

2019 GLOBAL SERVICES & MARKETS

Service Type: Development and/or fundraising services

Service Code: 37707

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- *Market Reports*
- *Industry Trends*
- *Demographic Data*

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Regional Markets

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Algeria	DZA	Cuba	CUB
Angola	AGO	Cyprus	CYP
Argentina	ARG	Czech Republic	CZE
Armenia	ARM	Denmark	DNK
Australia	AUS	Dominican Republic	DOM
Austria	AUT	Ecuador	ECU
Azerbaijan	AZE	Egypt, Arab Rep.	EGY
Bahamas, The	BHS	El Salvador	SLV
Bahrain	BHR	Equatorial Guinea	GNQ
Bangladesh	BGD	Estonia	EST
Belarus	BLR	Ethiopia	ETH
Belgium	BEL	Finland	FIN
Bolivia	BOL	France	FRA
Bosnia and Herzegovina	BIH	Gabon	GAB
Botswana	BWA	Georgia	GEO
Brazil	BRA	Germany	DEU
Brunei Darussalam	BRN	Ghana	GHA
Bulgaria	BGR	Greece	GRC
Burkina Faso	BFA	Guam	GUM
Burundi	BDI	Guatemala	GTM
Cambodia	KHM	Guinea	GIN
Cameroon	CMR	Haiti	HTI
Canada	CAN	Honduras	HND
Chad	TCD	Hong Kong SAR, China	HKG
Chile	CHL	Hungary	HUN
China	CHN	Iceland	ISL
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Country Name	Country Code	Country Name	Country Code
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Israel	ISR	Pakistan	PAK
Italy	ITA	Panama	PAN
Jamaica	JAM	Papua New Guinea	PNG
Japan	JPN	Paraguay	PRY
Jordan	JOR	Peru	PER
Kazakhstan	KAZ	Philippines	PHL
Kenya	KEN	Poland	POL
Korea, Rep.	KOR	Portugal	PRT
Kosovo	XKX	Puerto Rico	PRI
Kuwait	KWT	Qatar	QAT
Kyrgyz Republic	KGZ	Romania	ROU
Lao PDR	LAO	Russian Federation	RUS
Latvia	LVA	Saudi Arabia	SAU
Lebanon	LBN	Senegal	SEN
Lithuania	LTU	Serbia	SRB
Luxembourg	LUX	Singapore	SGP
Macao SAR, China	MAC	Slovak Republic	SVK
Macedonia, FYR	MKD	Slovenia	SVN
Madagascar	MDG	South Africa	ZAF
Malaysia	MYS	South Sudan	SSD
Mali	MLI	Spain	ESP
Malta	MLT	Sri Lanka	LKA
Mauritius	MUS	Sudan	SDN
Mexico	MEX	Sweden	SWE
Moldova	MDA	Switzerland	CHE
Mongolia	MNG	Tanzania	TZA
Morocco	MAR	Thailand	THA
Mozambique	MOZ	Trinidad and Tobago	TTO
Myanmar	MMR	Tunisia	TUN
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Nicaragua	NIC	United Arab Emirates	ARE
Nigeria	NGA	United Kingdom	GBR
Norway	NOR	United States	USA

Country Name	Country Code
Uruguay	URY
Uzbekistan	UZB
Venezuela, RB	VEN
Vietnam	VNM
West Bank and Gaza	PSE
Yemen, Rep.	YEM
Zambia	ZMB
Zimbabwe	ZWE

Users' Guide

Service: Development and/or fundraising services

About this Report

This report covers the global forecast for development and/or fundraising services produced in the development and/or fundraising services industry.

More than 140 countries are featured in this report as well as global and regional summaries. Estimates on services or functions sales (business services value) are published for six historical years and two forecast years. Services sales include the total value of all services and functions provided to either internal corporate departments or external customers.

These estimates services and functions values are also considered "market potentials" because the calculations assume efficient, free markets. Estimates can vary in countries with inefficient, closed markets with such issues as oppressive regulations and tariffs, black markets, and political problems impacted a regular business cycle.

Published annually, this report provides a unique and accurate estimate on market sizing for this services/functions using a proprietary economic model that integrates historical trends (horizontal analysis) and longitudinal analysis of incorporated industries (vertical analysis).

Services sales value are presented in US Dollars and local currency units for historical and forecast years.

Regional summaries include North America, Europe, Asia-Pacific, Latin America, Africa, and Middle East. Percent shares are presented for each region as a share of the global market.

Services values are also broken down by related costs, such as payroll, fringe benefits, operating expenses, as well as contract labor costs, cost of insurance, and lease and rental payments.

This report does not list key players/companies in the market but focuses on a top-down and outlook view of the market despite the existing and entering of market companies.

Users' Guide

NOTE: These service markets are different than definitions for service industries. Service industries aggregate the total companies sales for companies that self-select to be defined within that industry.

Service markets are the part of service company sales that make revenues in that function. For example, media representation services are a significant part of revenue streams for:

- 1) advertising agencies
- 2) media representation firms
- 3) public relations firms

Media representation service are important departments in most corporations (manufacturing, financial, retail, etc.) but these departments do not bring in revenue.

Also, media representation firms primarily make their most revenue from media representation but they also generate revenue from (that would be captured in separate reports):

- 1) advertising placement services
- 2) display advertising services
- 3) direct mail advertising services

Users' Guide

Barnes Reports is a leading publisher of industry studies on U.S. and global industries and forecasts sales and employment demographics. As a way of making the most of this information, we have included a few suggestions and tips to aid users in processing and using this information.

Managers, planners, and market researchers use this information for a variety of activities:

- Sizing markets and segments – You can estimate the size of the regional markets you sell in and your company's market penetration into that market. You can do the same with the market segments in which you participate.
- Sales territory potential – You can estimate your market penetration and also the market potential in any regional area or market segment.
- Sales forecasting – With the estimates on the size of the industry, market researchers supporting a sales force can then estimate and forecast the future size of the industry.
- Advertising strategies – You can use this information for forecasting and estimating sales potential and target advertising campaigns.
- Competitive analysis – You will use the information to locate your possible competitors (if it is not already known), to estimate their size, growth and strengths and weaknesses and to see what market segments in which they participate.

We recognize that many managers today are asked to provide detailed analysis of their markets, sales territories, distribution channels, and product placements. We have organized these reports in a logical format making your market analysis and research tasks easy to accomplish.

Definitions & Methodology

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Definitions

The services described in this report are primarily defined by its title since the title is generally long and includes most of the criteria used to differentiate the service from other similar services. The service descriptions are sourced from the U.S. Census. Additionally descriptions can be collected from the services industry descriptions that each equipment is categorized. The U.S. Census business service industry descriptions are listed below:

NAICS 54111: Offices of Lawyers. This industry comprises offices of legal practitioners known as lawyers or attorneys (i.e., counselors-at-law) primarily engaged in the practice of law. Establishments in this industry may provide expertise in a range or in specific areas of law, such as criminal law, corporate law, family and estate law, patent law, real estate law, or tax law.

NAICS 54132: Landscape Architectural Services. This industry comprises establishments primarily engaged in planning and designing the development of land areas for projects, such as parks and other recreational areas; airports; highways; hospitals; schools; land subdivisions; and commercial, industrial, and residential areas, by applying knowledge of land characteristics, location of buildings and structures, use of land areas, and design of landscape projects.

NAICS 54131: Architectural Services. This industry comprises establishments primarily engaged in planning and designing residential, institutional, leisure, commercial, and industrial buildings and structures by applying knowledge of design, construction procedures, zoning regulations, building codes, and building materials.

NAICS 54133: Engineering Services. This industry comprises establishments primarily engaged in applying physical laws and principles of engineering in the design, development, and utilization of machines, materials, instruments, structures, processes, and systems. The assignments undertaken by these establishments may involve any of the following activities: provision of advice, preparation of feasibility studies, preparation of preliminary and final plans and designs, provision of technical services during the construction or installation phase, inspection and evaluation of engineering projects, and related services.

NAICS 54138: Testing Laboratories. This industry comprises establishments primarily engaged in performing physical, chemical, and other analytical testing services, such as acoustics or vibration testing, assaying,

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biological testing (except medical and veterinary), calibration testing, electrical and electronic testing, geotechnical testing, mechanical testing, nondestructive testing, or thermal testing. The testing may occur in a laboratory or on-site.

NAICS 54141: Interior Design Services . This industry comprises establishments primarily engaged in planning, designing, and administering projects in interior spaces to meet the physical and aesthetic needs of people using them, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture. Interior designers and interior design consultants work in areas, such as hospitality design, health care design, institutional design, commercial and corporate design, and residential design.

NAICS 54142: Industrial Design Services. This industry comprises establishments primarily engaged in creating and developing designs and specifications that optimize the use, value, and appearance of their products. These services can include the determination of the materials, construction, mechanisms, shape, color, and surface finishes of the product, taking into consideration human characteristics and needs, safety, market appeal, and efficiency in production, distribution, use, and maintenance. Establishments providing automobile or furniture industrial design services or industrial design consulting services are included in this industry.

NAICS 54143: Graphic Design Services . This industry comprises establishments primarily engaged in planning, designing, and managing the production of visual communication in order to convey specific messages or concepts, clarify complex information, or project visual identities. These services can include the design of printed materials, packaging, advertising, signage systems, and corporate identification (logos). This industry also includes commercial artists engaged exclusively in generating drawings and illustrations requiring technical accuracy or interpretative skills.

NAICS 54151: Computer Systems Design and Related Services . This industry comprises establishments primarily engaged in providing expertise in the field of information technologies through one or more of the following activities: (1) writing, modifying, testing, and supporting software to meet the needs of a particular customer; (2) planning and designing computer systems that integrate computer hardware, software, and communication technologies; (3) on-site management and operation of clients' computer systems and/or data processing facilities; and (4) other

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professional and technical computer-related advice and services.

NAICS 54161: Management Consulting Services . This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on management issues, such as strategic and organizational planning; financial planning and budgeting; marketing objectives and policies; human resource policies, practices, and planning; production scheduling; and control planning.

NAICS 54162: Environmental Consulting Services. This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on environmental issues, such as the control of environmental contamination from pollutants, toxic substances, and hazardous materials. These establishments identify problems (e.g., inspect buildings for hazardous materials), measure and evaluate risks, and recommend solutions. They employ a multidisciplinary staff of scientists, engineers, and other technicians with expertise in areas, such as air and water quality, asbestos contamination, remediation, and environmental law.

NAICS 54181: Advertising Agencies . This industry comprises establishments primarily engaged in designing and implementing public relations campaigns. These campaigns are designed to promote the interests and image of their clients. Establishments providing lobbying, political consulting, or public relations consulting are included in this industry.

NAICS 54182: Public Relations Agencies . This industry comprises establishments primarily engaged in designing and implementing public relations campaigns. These campaigns are designed to promote the interests and image of their clients. Establishments providing lobbying, political consulting, or public relations consulting are included in this industry.

NAICS 54183: Media Buying Agencies Industry. This industry comprises establishments primarily engaged in purchasing advertising time or space from media outlets and reselling it to advertising agencies or individual companies directly.

NAICS 54184: Media Representatives Industry. This industry comprises establishments of independent representatives primarily engaged in selling media time or space for media owners.

NAICS 54185: Display Advertising Industry. This industry

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comprises establishments primarily engaged in creating and designing public display advertising, campaign materials, such as printed, painted, or electronic displays, and/or placing such displays on indoor or outdoor billboards and panels, or on or within transit vehicles or facilities, shopping malls, retail (in-store) displays, and other display structures or sites.

NAICS 54186: Direct Mail Advertising . This industry comprises establishments primarily engaged in (1) creating and designing advertising campaigns for the purpose of distributing advertising materials (e.g., coupons, flyers, samples) or specialties (e.g., key chains, magnets, pens with customized messages imprinted) by mail or other direct distribution; and/or (2) preparing advertising materials or specialties for mailing or other direct distribution. These establishments may also compile, maintain, sell, and rent mailing lists.

NAICS 54187: Advertising Materials Distribution Services. This industry comprises establishments primarily engaged in the direct distribution or delivery of advertisements (e.g., circulars, coupons, handbills) or samples. Establishments in this industry use methods, such as delivering advertisements or samples door-to-door, placing flyers or coupons on car windshields in parking lots, or handing out samples in retail stores.

NAICS 54191: Marketing Research & Public Opinion Polling . This industry comprises establishments primarily engaged in systematically gathering, recording, tabulating, and presenting marketing and public opinion data.

NAICS 54194: Veterinary Services . This industry comprises establishments of licensed veterinary practitioners primarily engaged in the practice of veterinary medicine, dentistry, or surgery for animals; and establishments primarily engaged in providing testing services for licensed veterinary practitioners.

NAICS 56131: Employment Placement Agencies. This industry comprises establishments primarily engaged in listing employment vacancies and in referring or placing applicants for employment. The individuals referred or placed are not employees of the employment agencies.

NAICS 56132: Temporary Help Services. This industry comprises establishments primarily engaged in supplying workers to clients' businesses for limited periods of time to supplement the working force of the client. The

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individuals provided are employees of the temporary help service establishment. However, these establishments do not provide direct supervision of their employees at the clients' work sites.

NAICS 56133: Professional Employer Organizations. This industry comprises establishments primarily engaged in providing human resources and human resource management services to staff client businesses. Establishments in this industry operate in a coemployment relationship with client businesses or organizations and are specialized in performing a wide range of human resource and personnel management duties, such as payroll accounting, payroll tax return preparation, benefits administration, recruiting, and managing labor relations. Employee leasing establishments typically acquire and lease back some or all of the employees of their clients and serve as the employer of the leased employees.

NAICS 56144: Collection Agencies. This industry comprises establishments primarily engaged in collecting payments for claims and remitting payments collected to their clients.

NAICS 56192: Convention & Trade Show Organizers. This industry comprises establishments primarily engaged in organizing, promoting, and/or managing events, such as business and trade shows, conventions, conferences, and meetings (whether or not they manage and provide the staff to operate the facilities in which these events take place).

NAICS 56211: Waste Collection. This industry comprises establishments primarily engaged in (1) collecting and/or hauling hazardous waste, nonhazardous waste, and/or recyclable materials within a local area and/or (2) operating hazardous or nonhazardous waste transfer stations. Hazardous waste collection establishments may be responsible for the identification, treatment, packaging, and labeling of waste for the purposes of transport.

NAICS 56221: Waste Treatment & Disposal. This industry comprises establishments primarily engaged in (1) operating waste treatment or disposal facilities (except sewer systems or sewage treatment facilities) or (2) the combined activity of collecting and/or hauling of waste materials within a local area and operating waste treatment or disposal facilities. Waste combustors or incinerators (including those that may produce byproducts, such as electricity), solid waste landfills, and compost dumps are included in this industry.

NAICS 56291: Remediation Services. This industry comprises establishments primarily engaged in one or more of the following:

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(1) remediation and cleanup of contaminated buildings, mine sites, soil, or ground water; (2) integrated mine reclamation activities, including demolition, soil remediation, waste water treatment, hazardous material removal, contouring land, and revegetation; and (3) asbestos, lead paint, and other toxic material abatement.

NAICS 62111: Offices of Physicians. This industry comprises establishments primarily of licensed practitioners having the degree of M.D. and engaged in the practice of general or specialized medicine and surgery. Establishments operating as clinics of physicians are included in this business. Osteopathic physicians are classified in 8031.

NAICS 62121: Offices of Dentists. This industry comprises establishments primarily of licensed practitioners having the degree of D.M.D. or D.D.S. (or D.D.Sc.) and engaged in the practice of general or specialized dentistry, including dental surgery. Establishments operating as clinics of dentists are included in this business.

NAICS 62131: Offices of Chiropractors. This industry comprises establishments of health practitioners having the degree of D.C. (Doctor of chiropractic) primarily engaged in the independent practice of chiropractic. These practitioners provide diagnostic and therapeutic treatment of neuromusculoskeletal and related disorders through the manipulation and adjustment of the spinal column and extremities, and operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.

NAICS 62142: Outpatient Mental Health & Substance Abuse Centers. This industry comprises establishments with medical staff primarily engaged in providing outpatient services related to the diagnosis and treatment of mental health disorders and alcohol and other substance abuse. These establishments generally treat patients who do not require inpatient treatment. They may provide a counseling staff and information regarding a wide range of mental health and substance abuse issues and/or refer patients to more extensive treatment programs, if necessary.

NAICS 62161: Home Health Care Services. This industry comprises establishments primarily engaged in providing skilled nursing or medical care in the home, under supervision of a physician. Registered or practical nurses engaged in the independent practice of their profession are classified in 8049, and nurses' registries are classified in 7361. Selling health care

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products for personal or household consumption is classified in retail trade and renting or leasing products for health care is classified in 7352.

NAICS 62191: Ambulance Services. This industry comprises

establishments primarily engaged in providing transportation of patients by ground or air, along with medical care. These services are often provided during a medical emergency, but are not restricted to emergencies. The vehicles are equipped with lifesaving equipment operated by medically trained personnel.

NAICS 62211: Medical & Surgical Hospital. This industry comprises

establishments primarily engaged in providing general medical and surgical services and other hospital services. Specialty hospitals are classified in 8063 and 8069.

NAICS 62221: Psychiatric & Substance Abuse Hospitals. This industry

comprises establishments known and licensed as psychiatric and substance abuse hospitals primarily engaged in providing diagnostic, medical treatment, and monitoring services for inpatients who suffer from mental illness or substance abuse disorders. The treatment often requires an extended stay in the hospital. These establishments maintain inpatient beds and provide patients with food services that meet their nutritional requirements. They have an organized staff of physicians and other medical staff to provide patient care services.

NAICS 62231: Other Specialty Hospitals. This industry comprises

establishments known and licensed as specialty hospitals primarily engaged in providing diagnostic and medical treatment to inpatients with a specific type of disease or medical condition (except psychiatric or substance abuse). Hospitals providing long-term care for the chronically ill and hospitals providing rehabilitation, restorative, and adjustive services to physically challenged or disabled people are included in this industry. These establishments maintain inpatient beds and provide patients with food services that meet their nutritional requirements.

NAICS 62311: Nursing Care Facilities. This industry comprises

establishments primarily engaged in providing inpatient nursing and rehabilitative services, but not on a continuous basis. Staffing must include 24-hour per day personnel with a licensed nurse on duty full-time during each day shift. At least once a week, consultation from a registered nurse on the delivery of care is required. Included are facilities certified to deliver

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intermediate care under the Medicaid program.

NAICS 62331: Community Care Facilities for the Elderly. This industry comprises establishments primarily engaged in the provision of residential social and personal care for children, the aged, and special categories of persons with some limits on ability for self-care, but where medical care is not a major element. Included are establishments providing 24-hour year-round care for children. Boarding schools providing elementary and secondary education are classified in 8211.

NAICS 62411: Child & Youth Services. This industry comprises establishments primarily engaged in providing nonresidential social assistance services for children and youth. These establishments provide for the welfare of children in such areas as adoption and foster care, drug prevention, life skills training, and positive social development.

NAICS 62423: Emergency & Other Relief Services. This industry comprises establishments primarily engaged in providing food, shelter, clothing, medical relief, resettlement, and counseling to victims of domestic or international disasters or conflicts (e.g., wars).

NAICS 62441: Child Day Care Services. This industry comprises establishments primarily engaged in providing day care of infants or children. These establishments generally care for preschool children, but may care for older children when they are not in school and may also offer prekindergarten educational programs.

Methodology

Barnes Reports' Global Services & Markets report series provide estimates of the size and characteristics of the largest services and functions by service industries in the largest 140 global countries. These estimates are produced by a proprietary economic model that is based on a number of sources and factors:

1. The size of U.S. services and functions from the U.S. Economic Census over the last twenty years.
2. Estimate current and forecast size of U.S. services and functions using regression analysis.

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3. Adjust estimates and forecasts using the most current U.S. services industry data and trends. This adjustment adds vertical (industry) analysis to the forementioned horizontal (trend) analysis.

4. Global estimates use trend GDP data and the ratio of service industries to GDP by country from World Bank databases to compare U.S. versus global countries size and trends.

Executive Summary

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2019 GLOBAL SERVICES SECTOR FORECAST

The global economic forecast for 2019 is the strongest it has been in more than a decade. Barnes Reports is forecasting 3.0 percent GDP growth from 2018 to 2019 globally. GDP forecasts for the largest countries include 4.0 percent for the United States, 7.0 percent for China, 6.0 percent for India, -2.0 percent for Japan and 1.0 percent for Germany.

The global services sector forecast for 2019 will outpace the growth in GDP increases. Barnes Reports is forecasting 7.4 percent manufacturing sector growth from 2018 to 2019 globally. The consulting services subsector will experience the highest growth of 13 percent.

Subsectors that are trailing the sector average forecast growth from 2018 to 2019 are advertising placement services (1.7 percent from 2018 to 2019) and basic telephony services (-4.7 percent).

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
211	Food services	1,919,908	6%
301	Health care services	6,529,049	7%
327	Temporary staffing services	1,494,321	6%
374	Computer systems services	1,385,966	10%
550	Loan services	1,587,729	2%
577	Investment services	1,139,139	3%
580	Insurance services	7,306,976	6%
386	Consulting services	1,413,454	13%

The largest subsectors in the services sector are the insurance services subsector (\$7.3 trillion for 2019) and the health care services subsector (\$6.5 trillion).

Political Issues

Political issues in the United States in the last few years have dramatically changed the landscape for the manufacturing sector globally. The Tax Cuts and Jobs Act of 2017, which lowered U.S. corporate tax rates, has generated significant business confidence in the United States and increased inventory expenditures, capital investment and bonuses to employees.

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Tariffs imposed by the United States against certain products by China have positive and negative impacts on U.S. manufacturing subsectors. The first \$200 billion round of duties in 2018 could be followed by another \$267 billion. Some U.S. products that benefit from the policy are small appliances, hot water heaters, steel products and wood products. Some U.S. products that are negatively impacted are aircraft, boats, fiberglass, electronics, chemicals and mattresses.

Another U.S. policy that is significantly changing the global economy is repatriating U.S. corporate money from abroad back the United States. Before the Tax Cuts and Job Act of 2017, income earned abroad was taxed by 35 percent and now it is 15.5 percent. Approximately \$3.1 trillion in U.S. corporate money is abroad but some of it is coming back. In the first months of 2018, nearly \$158 billion was repatriated according to the Federal Reserve.

Finance Issues

The rapid increase in the U.S. stock market since 2016 has raised investment in U.S. companies as well as the health of retirement accounts and investor wealth. Barnes Reports is forecasting some pullbacks in the market for the next few years as business confidence continues to support the stock market but many investors will take earnings out of the market.

Capital equipment spending by businesses in other sectors, a key driver of manufacturing profitability, has been accelerating. Equipment investment growth accelerated to 4.8 percent during 2017 in the United States according to the U.S. Census and Barnes Reports is forecasting continued equipment spending between 4.0 to 5.0 percent for 2018 and 2019.

Interest rates have been on the rise in 2018 as the Federal Reserve is trying to contain inflation and put the brakes on a sky-high U.S. stock market.

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Labor Issues

The U.S. labor market is the tightest it has been in decades, which benefits employee wages and benefits, but makes it difficult for employers to find qualified workers. The unemployment rate is 3.8 percent in late 2018 and Barnes Reports is forecasting a stable rate for 2019.

The need for more workers in the United States should moderately benefit employees and economies in developing countries as work is outsourced abroad. International migration of temporary workers may not increase by remote computer work will grow, especially in India.

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SUBSECTOR 211: Food services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
21101	Meals & snacks served by a server (i.e., full service)	797,614	5%
21103	Meals & snacks dispensed w/o table service for consumption on premises	399,343	7%
21105	Meals & snacks dispensed via drive-through service	254,329	5%
21107	Meals & snacks prepared for immediate consumption off the premises	253,001	8%
TOTAL		1,919,908	6%

The food services subsector globally is projected to be \$1.9 trillion in 2019, growing by 6 percent from 2018 to 2019.

The meals prepared for immediate consumption off premises services is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (8 percent) followed by the meals dispensed without table service (7 percent).

The largest global services in this subsector are the meals served by a server (\$797 billion for 2019) and the meals dispensed without table service (\$399 billion).

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SUBSECTOR 301: Health care services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
30171	Patient care - Infectious and parasitic diseases	127,073	-3%
30172	Patient care - Neoplasms (tumors)	613,148	11%
30173	Patient care - Endocrine, nutritional and immunity disorders	90,828	-6%
30175	Patient care - Mental disorders	222,989	1%
30176	Patient care - Diseases of the nervous system and sense organs	270,854	3%
30177	Patient care - Diseases of the circulatory system	1,232,423	17%
30178	Patient care - Diseases of the respiratory system	331,754	5%
30179	Patient care - Diseases of the digestive system	464,011	8%
30181	Patient care - Diseases of the genitourinary system (reproductive)	268,874	3%
30182	Patient care - Complications of pregnancy, and the puerperium	97,481	-6%
30183	Patient care - Diseases of the skin and subcutaneous tissue	63,684	-9%
30184	Patient care - Diseases of the musculoskeletal system and connective tissue	1,484,469	19%
30187	Patient care - Symptoms, signs, and ill-defined conditions	531,023	10%
30188	Patient care - Injury and poisoning	499,196	9%
30189	Patient care - Supplementary classification of factors influencing health status	522,282	6%
30192	Patient care - All other patient care	370,231	4%
TOTAL		6,529,049	7%

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SUBSECTOR 325: Health care services (continued)

The health care services subsector globally is projected to be \$6.5 trillion in 2019, growing by 7 percent from 2018 to 2019.

The diseases of the musculoskeletal system industry is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (19 percent) followed by the diseases of the circulatory industry (17 percent).

The largest global industries in this subsector are the diseases of musculoskeletal services (\$1.4 trillion for 2019) and the resin and diseases of circulatory services (\$1.2 trillion).

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SUBSECTOR 327: Temporary staffing services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
32731	Temporary staffing - Office/clerical and administrative support staff	72,091	0%
32732	Temporary staffing - Industrial/trades staff	117,316	3%
32734	Temporary staffing - Information technology (IT) staff	190,078	14%
32783	Employee leasing services with payroll, benefit, and human resource services	495,971	6%
TOTAL		1,494,321	6%

The temporary staffing services subsector globally is projected to be \$1.5 trillion in 2019, growing by 6 percent from 2018 to 2019.

The temporary staffing for information technology (IT) staff is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (14 percent) followed by the employee leasing services (6 percent).

The largest global industries in this subsector are the employee leasing services industry (\$495 billion for 2019) and the temporary staffing for IT staff industry (\$190 billion).

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SUBSECTOR 374: Computer systems services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
37411	Website design and development services	175,343	12%
37412	Database design and development services	189,247	13%
37413	Other custom application design and development services	356,311	13%
37434	Computer systems integration services, including telephony	207,140	10%
TOTAL		1,385,966	10%

The computer systems services subsector globally is projected to be \$1.4 trillion in 2019, growing by 10 percent from 2018 to 2019.

The database design and development services industry is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (13 percent) followed by the other custom application design and development services industry (13 percent).

The largest global industries in this subsector are the other custom application design and development services industry (\$356 billion for 2019) and the computer systems integration services industry (\$207 billion).

Executive Summary

Service: Development and/or fundraising services

SUBSECTOR 550: Loan services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
55011	Loans to financial businesses	126,486	6%
55013	Loans to non-financial businesses	481,312	3%
55015	Residential mortgage loans	195,680	-4%
55017	Vehicle loans, consumer	108,427	-1%
55032	Credit card services for cardholders, consumer	582,631	10%
55033	Credit card services for merchants	206,149	2%
TOTAL		1,587,729	2%

The loan services subsector globally is projected to be \$1.6 trillion in 2019, growing by 2 percent from 2018 to 2019.

The credit card services for cardholders industry is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (10 percent) followed by the loans to financial businesses industry (6 percent).

The largest global industries in this subsector are the credit card services for cardholders industry (\$582 billion for 2019) and the loans to non-financial businesses industry (\$481 billion).

Executive Summary

Service: Development and/or fundraising services

SUBSECTOR 577: Investment services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
57711	Financial management consulting services	143,834	-9%
57712	Personal financial planning and advice services	229,964	2%
57713	Personal investment management services	1,057,719	22%
57714	Mergers and acquisition financial consulting services	108,650	6%
TOTAL		1,139,139	3%

The investment services subsector globally is projected to be \$1.1 trillion in 2019, growing by 3 percent from 2018 to 2019.

The personal investment management services industry is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (22 percent) followed by the mergers and acquisition financial consulting services industry (6 percent).

The largest global industries in this subsector are the personal investment management services industry (\$1.1 trillion for 2019) and the personal financial planning and advice services industry (\$229 billion).

Executive Summary

Service: Development and/or fundraising services

SUBSECTOR 580: Insurance services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
58011	Individual term life	303,231	17%
58012	Individual whole life	187,127	-1%
58013	Individual universal life	96,116	-2%
58014	Group life	103,685	-3%
58031	Variable deferred annuities	751,818	6%
58032	Fixed rate deferred annuities	497,479	7%
58033	Immediate annuities	57,568	-5%
58042	Individual medical service plans	287,583	-2%
58043	Other health and medical insurance services	1,979,695	14%
58044	Dental service plans - group and individual	186,972	6%
58047	Group managed care medical service plans	845,835	6%
58048	Group fee-for-service medical service plans	242,186	6%
58071	Personal vehicle insurance policies	861,605	6%
58082	Underwriting services for homeowners multiple peril insurance policies	352,627	6%
58083	Underwriting services for commercial multiple peril insurance policies	123,088	4%
58089	Underwriting services for property and liability insurance policies, other	71,226	-4%
TOTAL		7,306,976	6%

The insurance services subsector globally is projected to be \$7.3 trillion in 2019, growing by 6 percent from 2018 to 2019.

Executive Summary

Service: Development and/or fundraising services

SUBSECTOR 580: Insurance services

The individual life term insurance services industry is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (17 percent) followed by the other health and medical insurance services industry (14 percent).

The largest global industries in this subsector are the other health and medical insurance services industry (\$1.9 trillion for 2019) and the personal vehicle insurance services industry (\$861 billion).

Executive Summary

Service: Development and/or fundraising services

SUBSECTOR 386: Consulting services

SERVICE CODE	SERVICE	2019 Sales (\$Million)	2018-2019 % Change
38621	Business strategy and planning consulting and implementation services	551,996	15%
38623	Other strategic management consulting and implementation services	112,094	9%
38641	Marketing strategy and market development consulting and implementation services	139,705	11%
TOTAL		1,413,454	13%

The consulting services subsector globally is projected to be \$1.4 trillion in 2019, growing by 13 percent from 2018 to 2019.

The business strategy and planning consulting services industry is forecast to have the highest growth rate globally from 2018 to 2019 in the subsector (15 percent) followed by the marketing strategy and market development consulting services industry (11 percent).

The largest global industries in this subsector are the business strategy and planning consulting services industry (\$551 billion for 2019) and the marketing strategy and market development consulting services industry (\$139 billion).

Global Markets

Service: Development and/or fundraising services

Country Name	2013	2014	2015	2016	2017	2018	2019	2020
Argentina	2.2	2.2	2.5	2.4	2.5	2.7	2.9	3.1
Australia	7.7	7.5	7.0	6.5	6.5	6.4	6.4	6.3
Austria	2.0	2.2	1.9	1.9	2.0	2.0	2.1	2.2
Belgium	2.7	2.9	2.4	2.5	2.5	2.6	2.6	2.7
Brazil	11.0	11.8	8.7	8.9	8.5	8.3	8.0	7.8
Canada	8.9	9.1	7.8	7.8	7.6	7.6	7.5	7.5
China	33.4	39.3	43.0	45.5	53.4	60.3	68.8	78.3
Colombia	1.5	1.6	1.2	1.2	1.2	1.2	1.2	1.2
Czech Republic	0.8	0.9	0.8	0.8	0.8	0.8	0.8	0.9
Denmark	1.7	1.8	1.5	1.6	1.6	1.7	1.7	1.7
Egypt, Arab Rep.	1.1	1.2	1.3	1.3	1.4	1.6	1.7	1.9
Finland	1.2	1.3	1.1	1.1	1.1	1.2	1.2	1.2
France	14.7	15.7	13.2	13.7	13.6	13.9	14.0	14.2
Germany	17.3	18.9	16.2	17.0	17.3	18.0	18.5	19.1
Greece	1.3	1.3	1.1	1.1	1.0	1.0	1.0	0.9
India	6.5	7.6	7.7	8.5	9.3	10.1	10.9	11.7
Indonesia	2.8	3.0	2.9	3.2	3.2	3.4	3.6	3.9
Iran, Islamic Rep.	1.7	1.7	1.7	1.8	1.6	1.6	1.6	1.5
Iraq	0.9	0.9	0.7	0.7	0.7	0.6	0.6	0.6
Ireland	1.2	1.3	1.2	1.3	1.4	1.5	1.6	1.7
Israel	1.5	1.7	1.6	1.7	1.9	2.1	2.3	2.5
Italy	10.6	11.3	9.4	9.7	9.6	9.8	9.8	9.9
Japan	27.4	26.8	23.5	26.8	23.2	22.6	21.9	21.3
Korea, Rep.	5.3	6.0	5.8	6.0	6.5	7.0	7.6	8.2
Malaysia	1.2	1.3	1.2	1.2	1.2	1.3	1.3	1.4
Mexico	5.7	6.1	5.4	5.0	5.3	5.4	5.4	5.5
Netherlands	4.5	4.8	4.1	4.3	4.3	4.5	4.5	4.7
Nigeria	2.0	2.4	2.2	1.9	2.2	2.4	2.5	2.6
Norway	2.1	2.1	1.7	1.7	1.6	1.6	1.6	1.6
Pakistan	0.9	1.0	1.1	1.2	1.3	1.3	1.4	1.5
Philippines	1.2	1.3	1.3	1.4	1.6	1.7	1.9	2.1
Poland	2.2	2.4	2.1	2.1	2.1	2.2	2.2	2.3
Portugal	1.1	1.2	1.0	1.1	1.1	1.1	1.1	1.1
Russian Federation	9.6	9.0	5.9	5.7	6.1	6.2	6.2	6.0
Saudi Arabia	2.1	2.4	2.6	2.8	3.0	3.2	3.4	3.6
Singapore	1.6	1.7	1.6	1.6	1.7	1.8	1.9	2.0
South Africa	1.7	1.7	1.5	1.4	1.4	1.3	1.3	1.2
Spain	6.8	7.3	6.2	6.5	6.4	6.5	6.6	6.7
Sweden	2.8	2.9	2.5	2.7	2.7	2.8	2.8	2.9

Global Markets

Service: Development and/or fundraising services

Country Name	2013	2014	2015	2016	2017	2018	2019	2020
Switzerland	3.6	3.9	3.7	3.8	3.9	4.1	4.3	4.5
Thailand	1.6	1.7	1.7	1.8	1.9	2.0	2.1	2.3
Turkey	3.8	3.9	3.5	3.7	3.7	3.9	4.0	4.1
United Arab Emirates	1.1	1.2	1.3	1.3	1.4	1.5	1.6	1.7
United Kingdom	14.4	16.8	15.8	14.7	16.1	17.0	17.8	18.7
United States	93.6	103.0	106.9	112.9	120.5	128.1	137.8	147.7
Venezuela, RB	1.2	1.8	1.7	1.8	1.7	1.7	1.5	1.4
Vietnam	0.5	0.6	0.6	0.7	0.7	0.8	0.9	1.0
GLOBAL	330.4	358.5	340.0	354.3	370.4	390.4	412.6	436.8

Source: Barnes Reports

*2018-2019 Forecasts

Regional Markets

Service: Development and/or fundraising services

The market for this service in North America is estimated to be \$0.2 billion dollars in 2019 and is expected to change by 6.8 percent from 2018 to 2019. The market in the Asia-Pacific region for this market is estimated to be \$0.1 billion in 2019 and is forecast to change by 7.9 percent from 2019 to 2020. The European market is \$0.1 billion in 2019.

Market Size by Year (US\$ Millions)

	2013	2014	2015	2016	2017	2018	2019	2020
North America	108.3	118.2	120.2	125.8	133.4	141.1	150.8	160.7
Latin America	14.7	15.6	12.4	12.6	12.3	12.2	12.1	12.0
Europe	85.8	93.6	81.3	82.7	84.5	87.2	89.2	91.7
Asia-Pacific	99.1	106.2	102.7	109.4	115.7	124.2	134.0	145.0
Middle East	7.6	8.0	7.8	8.2	8.3	8.6	8.9	9.3
Africa	4.8	5.3	5.0	4.6	5.0	5.3	5.5	5.8
GLOBAL	315.5	341.7	324.4	338.7	354.1	373.4	395.0	418.6

Regional Distribution

	2013	2014	2015	2016	2017	2018	2019	2020
North America	34.3%	34.6%	37.0%	37.1%	37.7%	37.8%	38.2%	38.4%
Latin America	4.7%	4.6%	3.8%	3.7%	3.5%	3.3%	3.1%	2.9%
Europe	27.2%	27.4%	25.1%	24.4%	23.9%	23.4%	22.6%	21.9%
Asia-Pacific	31.4%	31.1%	31.6%	32.3%	32.7%	33.3%	33.9%	34.6%
Middle East	2.4%	2.4%	2.4%	2.4%	2.3%	2.3%	2.3%	2.2%
Africa	1.5%	1.5%	1.5%	1.4%	1.4%	1.4%	1.4%	1.4%
GLOBAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Year-to-Year Change

	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
North America	9.2%	1.6%	4.7%	6.0%	5.8%	6.8%	6.6%
Latin America	5.9%	-20.0%	1.0%	-2.4%	-0.5%	-1.2%	-0.6%
Europe	9.1%	-13.2%	1.7%	2.1%	3.2%	2.3%	2.8%
Asia-Pacific	7.2%	-3.4%	6.5%	5.8%	7.4%	7.9%	8.2%
Middle East	6.3%	-2.5%	5.1%	0.7%	4.3%	3.3%	3.7%
Africa	11.3%	-6.4%	-6.5%	8.2%	5.2%	4.5%	5.2%
GLOBAL	8.3%	-5.1%	4.4%	4.6%	5.5%	5.8%	6.0%

Source: Barnes Reports

*2018-2019 Forecasts

Argentina

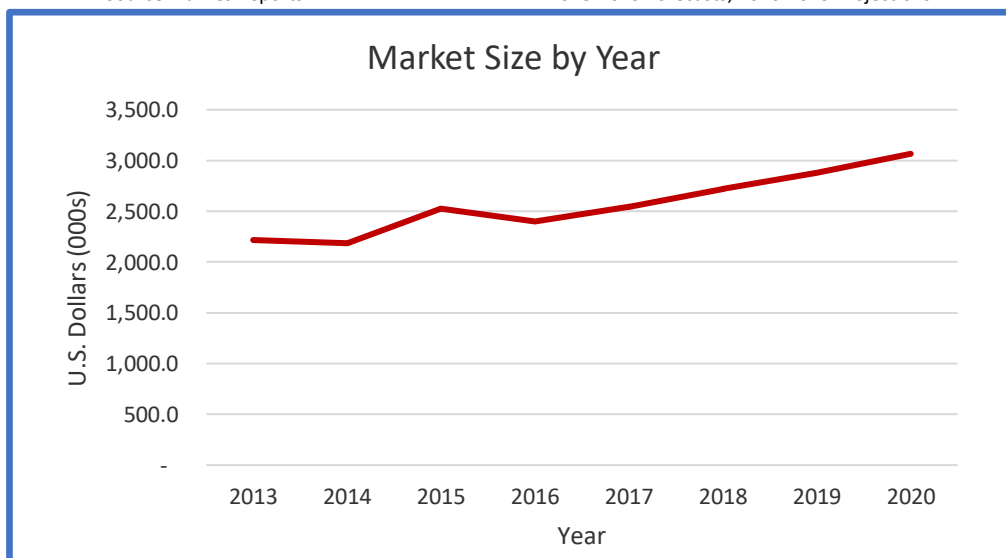
Service: Development and/or fundraising services

The market for this service in Argentina is estimated to be \$2.9 million dollars in 2019 and is expected to change by 6.5 percent from 2019 to 2020. The market will be 84.3 million Pesos in 2019 and is forecast to change by 36.2 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Pesos
2013	2,216.6	13,444.7
2014	2,184.9	19,009.4
2015	2,523.1	25,261.0
2016	2,399.3	35,408.7
2017	2,543.0	45,922.3
2018	2,718.5	61,880.8
2019	2,879.6	84,290.4
2020	3,065.5	116,908.4
2025	4,152.8	588,753.7
Y-to-Y Change	US Dollars	Pesos
2013-2014	-1.4%	41.4%
2014-2015	15.5%	32.9%
2015-2016	-4.9%	40.2%
2016-2017	6.0%	29.7%
2017-2018	6.9%	34.8%
2018-2019	5.9%	36.2%
2019-2020	6.5%	38.7%
CAGR 2020-2025	7.1%	403.6%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Argentina

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Argentina will be \$1.32 million dollars in 2019 and the lease and rental payments for the market will be \$0.14 million dollars. The operating expenses for this market is expected to reach \$2.17 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,324.63
Operating Expenses (\$1,000)	2,165.49
Employer Costs for Fringe Benefits (\$1,000)	210.21
Contract Labor Costs including Temporary Help (\$1,000)	89.27
Cost of Insurance (\$1,000)	40.31
Taxes and License Fees (\$1,000)	20.16
Lease and Rental Payments (\$1,000)	143.98

Cost of Services Estimates

The cost of transportation for this market in Argentina will be \$0.03 million dollars in 2019 and the cost of printing services for the market will be \$0.02 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	28.80
Cost of Purchased Repair and Maintenance Services (\$1,000)	14.40
Cost of Purchased Printing Services (\$1,000)	20.16
Cost of Purchased Advertising and Promotional Services (\$1,000)	40.31
Cost of Purchased Legal Services (\$1,000)	23.04
Cost of Purchased Accounting and Auditing Services (\$1,000)	14.40

*2018-2019 Forecasts

Source: Barnes Reports

Australia

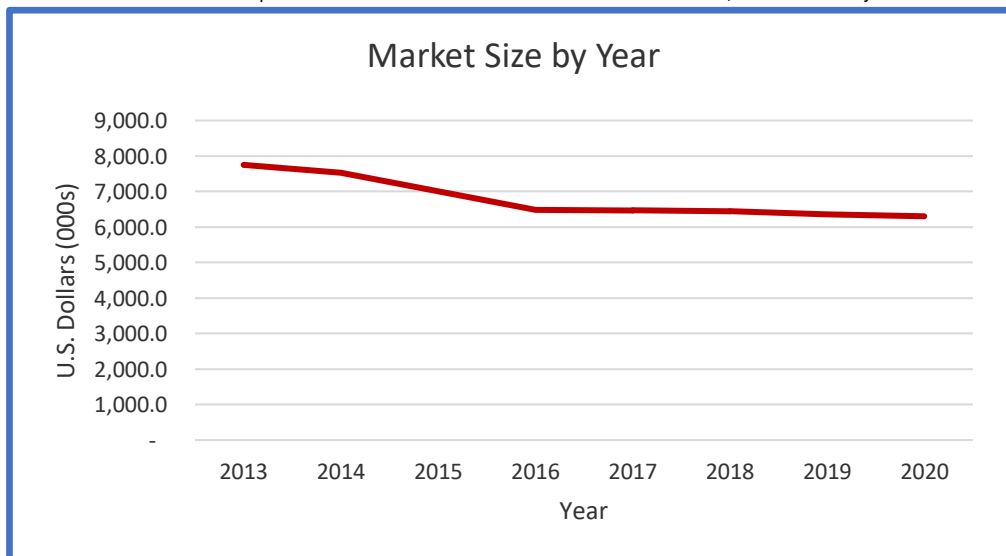
Service: Development and/or fundraising services

The market for this service in Australia is estimated to be \$6.4 million dollars in 2019 and is expected to change by -0.9 percent from 2019 to 2020. The market will be 10.7 million Dollars in 2019 and is forecast to change by 7 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Dollars
2013	7,749.9	7,553.8
2014	7,535.5	8,208.4
2015	7,007.8	8,422.6
2016	6,474.0	8,893.8
2017	6,471.6	9,427.7
2018	6,443.4	9,971.9
2019	6,356.8	10,666.9
2020	6,302.5	11,368.6
2025	5,983.5	15,338.6
Y-to-Y Change	US Dollars	Dollars
2013-2014	-2.8%	8.7%
2014-2015	-7.0%	2.6%
2015-2016	-7.6%	5.6%
2016-2017	0.0%	6.0%
2017-2018	-0.4%	5.8%
2018-2019	-1.3%	7.0%
2019-2020	-0.9%	6.6%
CAGR 2020-2025	-1.0%	34.9%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Australia

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Australia will be \$2.92 million dollars in 2019 and the lease and rental payments for the market will be \$0.32 million dollars. The operating expenses for this market is expected to reach \$4.78 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	2,924.12
Operating Expenses (\$1,000)	4,780.30
Employer Costs for Fringe Benefits (\$1,000)	464.04
Contract Labor Costs including Temporary Help (\$1,000)	197.06
Cost of Insurance (\$1,000)	88.99
Taxes and License Fees (\$1,000)	44.50
Lease and Rental Payments (\$1,000)	317.84

Cost of Services Estimates

The cost of transportation for this market in Australia will be \$0.06 million dollars in 2019 and the cost of printing services for the market will be \$0.04 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.03 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	63.57
Cost of Purchased Repair and Maintenance Services (\$1,000)	31.78
Cost of Purchased Printing Services (\$1,000)	44.50
Cost of Purchased Advertising and Promotional Services (\$1,000)	88.99
Cost of Purchased Legal Services (\$1,000)	50.85
Cost of Purchased Accounting and Auditing Services (\$1,000)	31.78

*2018-2019 Forecasts

Source: Barnes Reports

Austria

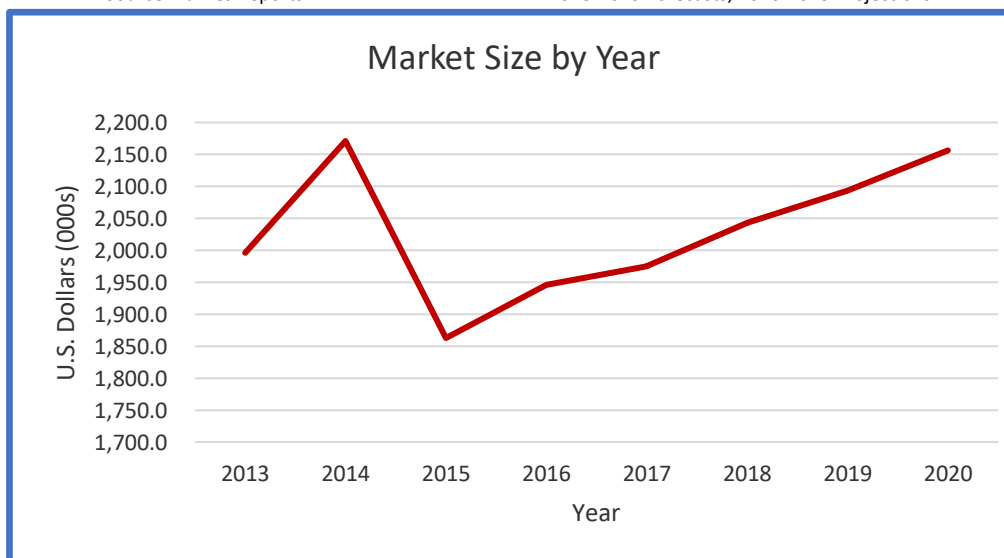
Service: Development and/or fundraising services

The market for this service in Austria is estimated to be \$2.1 million dollars in 2019 and is expected to change by 3 percent from 2019 to 2020. The market will be 2.1 million Euros in 2019 and is forecast to change by 6.8 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	1,996.2	1,503.4
2014	2,171.0	1,636.3
2015	1,862.8	1,679.6
2016	1,946.1	1,759.4
2017	1,975.2	1,868.8
2018	2,042.9	1,974.2
2019	2,093.6	2,109.2
2020	2,156.2	2,245.2
2025	2,475.8	3,010.4
Y-to-Y Change	US Dollars	Euros
2013-2014	8.8%	8.8%
2014-2015	-14.2%	2.6%
2015-2016	4.5%	4.8%
2016-2017	1.5%	6.2%
2017-2018	3.4%	5.6%
2018-2019	2.5%	6.8%
2019-2020	3.0%	6.4%
CAGR 2020-2025	3.0%	34.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Austria

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Austria will be \$0.96 million dollars in 2019 and the lease and rental payments for the market will be \$0.10 million dollars. The operating expenses for this market is expected to reach \$1.57 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	963.04
Operating Expenses (\$1,000)	1,574.37
Employer Costs for Fringe Benefits (\$1,000)	152.83
Contract Labor Costs including Temporary Help (\$1,000)	64.90
Cost of Insurance (\$1,000)	29.31
Taxes and License Fees (\$1,000)	14.66
Lease and Rental Payments (\$1,000)	104.68

Cost of Services Estimates

The cost of transportation for this market in Austria will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	20.94
Cost of Purchased Repair and Maintenance Services (\$1,000)	10.47
Cost of Purchased Printing Services (\$1,000)	14.66
Cost of Purchased Advertising and Promotional Services (\$1,000)	29.31
Cost of Purchased Legal Services (\$1,000)	16.75
Cost of Purchased Accounting and Auditing Services (\$1,000)	10.47

*2018-2019 Forecasts

Source: Barnes Reports

Belgium

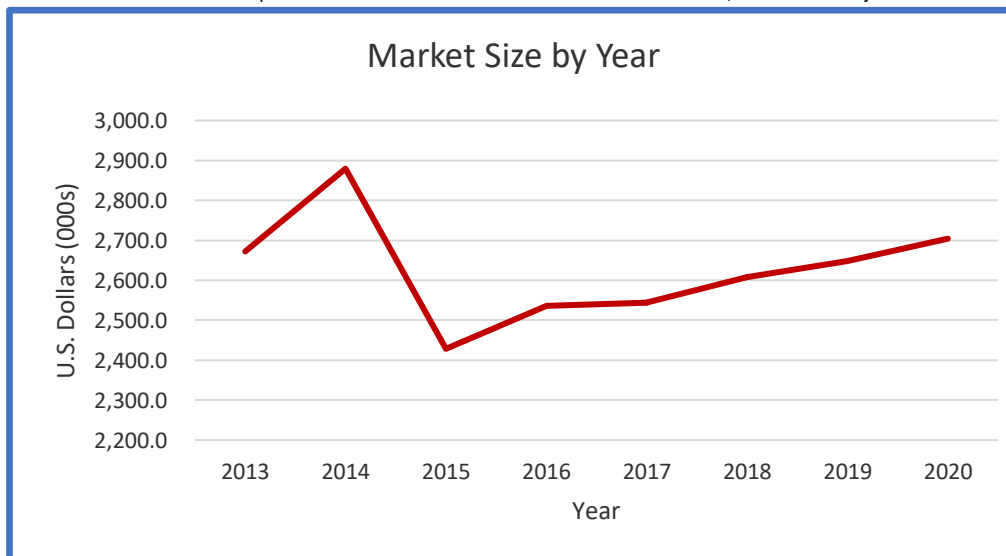
Service: Development and/or fundraising services

The market for this service in Belgium is estimated to be \$2.6 million dollars in 2019 and is expected to change by 2.1 percent from 2019 to 2020. The market will be 2.7 million Euros in 2019 and is forecast to change by 5.9 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	2,671.5	2,012.1
2014	2,879.5	2,170.3
2015	2,428.4	2,189.6
2016	2,536.4	2,293.0
2017	2,544.3	2,409.3
2018	2,607.9	2,523.4
2019	2,648.6	2,673.0
2020	2,703.4	2,820.9
2025	2,967.8	3,623.8
Y-to-Y Change	US Dollars	Euros
2013-2014	7.8%	7.9%
2014-2015	-15.7%	0.9%
2015-2016	4.4%	4.7%
2016-2017	0.3%	5.1%
2017-2018	2.5%	4.7%
2018-2019	1.6%	5.9%
2019-2020	2.1%	5.5%
CAGR 2020-2025	2.0%	28.5%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Belgium

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Belgium will be \$1.22 million dollars in 2019 and the lease and rental payments for the market will be \$0.13 million dollars. The operating expenses for this market is expected to reach \$1.99 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,218.37
Operating Expenses (\$1,000)	1,991.77
Employer Costs for Fringe Benefits (\$1,000)	193.35
Contract Labor Costs including Temporary Help (\$1,000)	82.11
Cost of Insurance (\$1,000)	37.08
Taxes and License Fees (\$1,000)	18.54
Lease and Rental Payments (\$1,000)	132.43

Cost of Services Estimates

The cost of transportation for this market in Belgium will be \$0.03 million dollars in 2019 and the cost of printing services for the market will be \$0.02 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	26.49
Cost of Purchased Repair and Maintenance Services (\$1,000)	13.24
Cost of Purchased Printing Services (\$1,000)	18.54
Cost of Purchased Advertising and Promotional Services (\$1,000)	37.08
Cost of Purchased Legal Services (\$1,000)	21.19
Cost of Purchased Accounting and Auditing Services (\$1,000)	13.24

*2018-2019 Forecasts

Source: Barnes Reports

Brazil

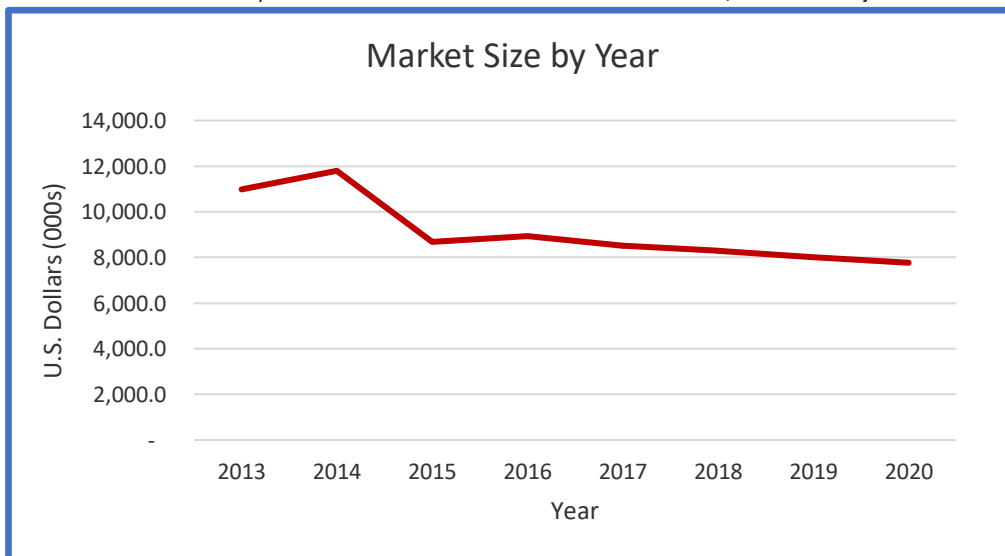
Service: Development and/or fundraising services

The market for this service in Brazil is estimated to be \$8.0 million dollars in 2019 and is expected to change by -3 percent from 2019 to 2020. The market will be 42 million Reals in 2019 and is forecast to change by 10.8 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Reals
2013	10,989.9	23,695.3
2014	11,796.2	27,756.4
2015	8,688.5	28,905.7
2016	8,940.5	31,193.4
2017	8,516.1	34,619.3
2018	8,296.0	37,938.8
2019	8,007.8	42,047.6
2020	7,768.1	46,430.3
2025	6,612.6	74,792.2
Y-to-Y Change	US Dollars	Reals
2013-2014	7.3%	17.1%
2014-2015	-26.3%	4.1%
2015-2016	2.9%	7.9%
2016-2017	-4.7%	11.0%
2017-2018	-2.6%	9.6%
2018-2019	-3.5%	10.8%
2019-2020	-3.0%	10.4%
CAGR 2020-2025	-3.0%	61.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Brazil

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Brazil will be \$3.68 million dollars in 2019 and the lease and rental payments for the market will be \$0.40 million dollars. The operating expenses for this market is expected to reach \$6.02 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	3,683.59
Operating Expenses (\$1,000)	6,021.87
Employer Costs for Fringe Benefits (\$1,000)	584.57
Contract Labor Costs including Temporary Help (\$1,000)	248.24
Cost of Insurance (\$1,000)	112.11
Taxes and License Fees (\$1,000)	56.05
Lease and Rental Payments (\$1,000)	400.39

Cost of Services Estimates

The cost of transportation for this market in Brazil will be \$0.08 million dollars in 2019 and the cost of printing services for the market will be \$0.06 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.04 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	80.08
Cost of Purchased Repair and Maintenance Services (\$1,000)	40.04
Cost of Purchased Printing Services (\$1,000)	56.05
Cost of Purchased Advertising and Promotional Services (\$1,000)	112.11
Cost of Purchased Legal Services (\$1,000)	64.06
Cost of Purchased Accounting and Auditing Services (\$1,000)	40.04

*2018-2019 Forecasts

Source: Barnes Reports

Canada

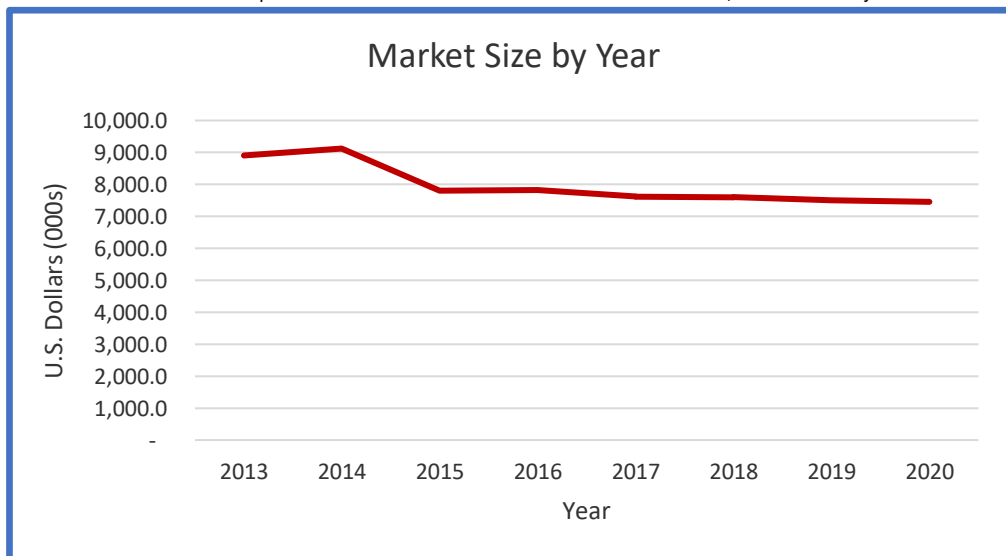
Service: Development and/or fundraising services

The market for this service in Canada is estimated to be \$7.5 million dollars in 2019 and is expected to change by -0.7 percent from 2019 to 2020. The market will be 11.9 million Dollars in 2019 and is forecast to change by 5.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Dollars
2013	8,908.0	9,173.5
2014	9,122.0	10,089.9
2015	7,795.8	9,971.5
2016	7,816.3	10,359.8
2017	7,616.0	10,853.3
2018	7,595.5	11,300.0
2019	7,506.0	11,898.3
2020	7,454.3	12,482.3
2025	7,136.5	15,563.4
Y-to-Y Change	US Dollars	Dollars
2013-2014	2.4%	10.0%
2014-2015	-14.5%	-1.2%
2015-2016	0.3%	3.9%
2016-2017	-2.6%	4.8%
2017-2018	-0.3%	4.1%
2018-2019	-1.2%	5.3%
2019-2020	-0.7%	4.9%
CAGR 2020-2025	-0.9%	24.7%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Canada

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Canada will be \$3.45 million dollars in 2019 and the lease and rental payments for the market will be \$0.38 million dollars. The operating expenses for this market is expected to reach \$5.64 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	3,452.74
Operating Expenses (\$1,000)	5,644.48
Employer Costs for Fringe Benefits (\$1,000)	547.93
Contract Labor Costs including Temporary Help (\$1,000)	232.68
Cost of Insurance (\$1,000)	105.08
Taxes and License Fees (\$1,000)	52.54
Lease and Rental Payments (\$1,000)	375.30

Cost of Services Estimates

The cost of transportation for this market in Canada will be \$0.08 million dollars in 2019 and the cost of printing services for the market will be \$0.05 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.04 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	75.06
Cost of Purchased Repair and Maintenance Services (\$1,000)	37.53
Cost of Purchased Printing Services (\$1,000)	52.54
Cost of Purchased Advertising and Promotional Services (\$1,000)	105.08
Cost of Purchased Legal Services (\$1,000)	60.05
Cost of Purchased Accounting and Auditing Services (\$1,000)	37.53

*2018-2019 Forecasts

Source: Barnes Reports

China

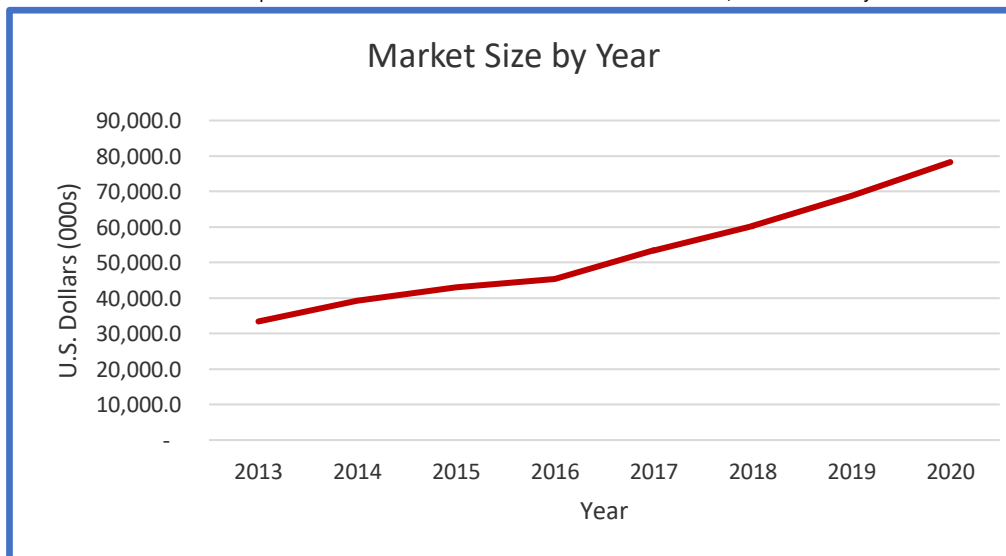
Service: Development and/or fundraising services

The market for this service in China is estimated to be \$68.8 million dollars in 2019 and is expected to change by 13.8 percent from 2019 to 2020. The market will be 448.7 million Yuans in 2019 and is forecast to change by 14.8 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Yuans
2013	33,409.2	206,996.9
2014	39,321.2	241,565.7
2015	42,973.1	267,614.7
2016	45,451.8	302,004.4
2017	53,387.0	344,045.8
2018	60,276.0	390,688.2
2019	68,824.8	448,678.8
2020	78,297.6	513,385.8
2025	143,705.9	987,956.4
Y-to-Y Change	US Dollars	Yuans
2013-2014	17.7%	16.7%
2014-2015	9.3%	10.8%
2015-2016	5.8%	12.9%
2016-2017	17.5%	13.9%
2017-2018	12.9%	13.6%
2018-2019	14.2%	14.8%
2019-2020	13.8%	14.4%
CAGR 2020-2025	16.7%	92.4%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



China

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in China will be \$31.66 million dollars in 2019 and the lease and rental payments for the market will be \$3.44 million dollars. The operating expenses for this market is expected to reach \$51.76 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	31,659.41
Operating Expenses (\$1,000)	51,756.26
Employer Costs for Fringe Benefits (\$1,000)	5,024.21
Contract Labor Costs including Temporary Help (\$1,000)	2,133.57
Cost of Insurance (\$1,000)	963.55
Taxes and License Fees (\$1,000)	481.77
Lease and Rental Payments (\$1,000)	3,441.24

Cost of Services Estimates

The cost of transportation for this market in China will be \$0.69 million dollars in 2019 and the cost of printing services for the market will be \$0.48 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.34 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	688.25
Cost of Purchased Repair and Maintenance Services (\$1,000)	344.12
Cost of Purchased Printing Services (\$1,000)	481.77
Cost of Purchased Advertising and Promotional Services (\$1,000)	963.55
Cost of Purchased Legal Services (\$1,000)	550.60
Cost of Purchased Accounting and Auditing Services (\$1,000)	344.12

*2018-2019 Forecasts

Source: Barnes Reports

Colombia

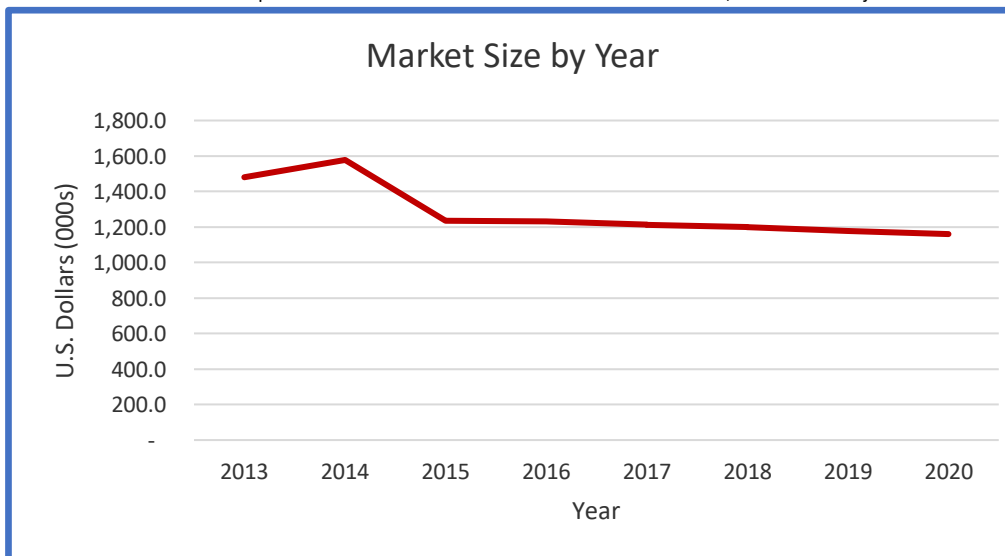
Service: Development and/or fundraising services

The market for this service in Colombia is estimated to be \$1.2 million dollars in 2019 and is expected to change by -1.4 percent from 2019 to 2020. The market will be 5212.1 million Pesos in 2019 and is forecast to change by 12.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Pesos
2013	1,479.3	2,764,423.8
2014	1,577.8	3,158,340.3
2015	1,234.1	3,383,730.5
2016	1,230.9	3,759,447.0
2017	1,212.2	4,181,993.6
2018	1,199.9	4,642,495.0
2019	1,177.0	5,212,076.9
2020	1,160.1	5,830,062.8
2025	1,069.9	10,016,999.0
Y-to-Y Change	US Dollars	Pesos
2013-2014	6.7%	14.2%
2014-2015	-21.8%	7.1%
2015-2016	-0.3%	11.1%
2016-2017	-1.5%	11.2%
2017-2018	-1.0%	11.0%
2018-2019	-1.9%	12.3%
2019-2020	-1.4%	11.9%
CAGR 2020-2025	-1.6%	71.8%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Colombia

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Colombia will be \$0.54 million dollars in 2019 and the lease and rental payments for the market will be \$0.06 million dollars. The operating expenses for this market is expected to reach \$0.89 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	541.40
Operating Expenses (\$1,000)	885.07
Employer Costs for Fringe Benefits (\$1,000)	85.92
Contract Labor Costs including Temporary Help (\$1,000)	36.49
Cost of Insurance (\$1,000)	16.48
Taxes and License Fees (\$1,000)	8.24
Lease and Rental Payments (\$1,000)	58.85

Cost of Services Estimates

The cost of transportation for this market in Colombia will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	11.77
Cost of Purchased Repair and Maintenance Services (\$1,000)	5.88
Cost of Purchased Printing Services (\$1,000)	8.24
Cost of Purchased Advertising and Promotional Services (\$1,000)	16.48
Cost of Purchased Legal Services (\$1,000)	9.42
Cost of Purchased Accounting and Auditing Services (\$1,000)	5.88

*2018-2019 Forecasts

Source: Barnes Reports

Czech Republic

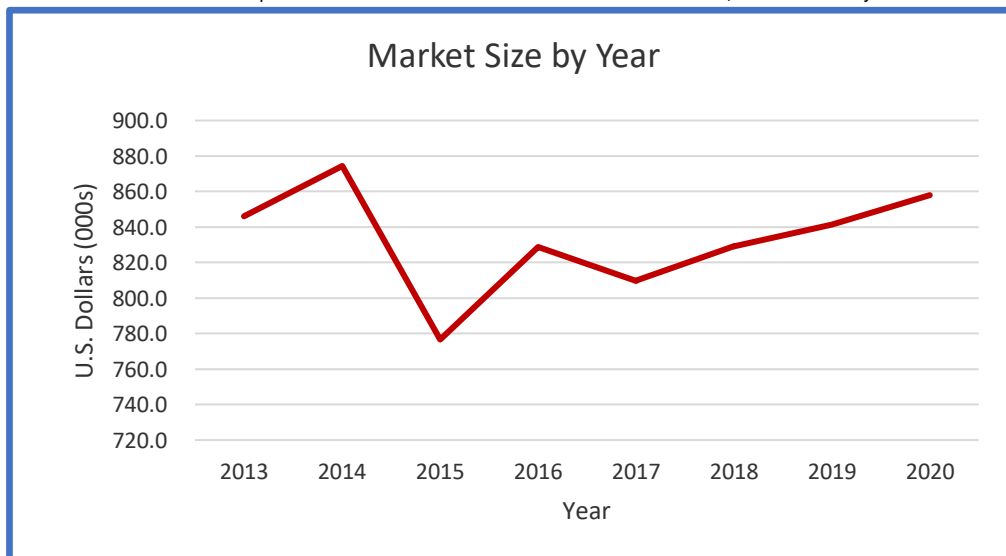
Service: Development and/or fundraising services

The market for this service in Czech Republic is estimated to be \$0.8 million dollars in 2019 and is expected to change by 2 percent from 2019 to 2020. The market will be 25.4 million Korunas in 2019 and is forecast to change by 8.4 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Korunas
2013	846.1	16,559.0
2014	874.4	18,149.9
2015	776.6	19,103.7
2016	828.7	20,254.5
2017	809.8	21,824.4
2018	829.2	23,401.2
2019	841.3	25,376.1
2020	857.8	27,416.8
2025	936.8	39,602.4
Y-to-Y Change	US Dollars	Korunas
2013-2014	3.3%	9.6%
2014-2015	-11.2%	5.3%
2015-2016	6.7%	6.0%
2016-2017	-2.3%	7.8%
2017-2018	2.4%	7.2%
2018-2019	1.5%	8.4%
2019-2020	2.0%	8.0%
CAGR 2020-2025	1.8%	44.4%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Czech Republic

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Czech Republic will be \$0.39 million dollars in 2019 and the lease and rental payments for the market will be \$0.04 million dollars. The operating expenses for this market is expected to reach \$0.63 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	386.98
Operating Expenses (\$1,000)	632.63
Employer Costs for Fringe Benefits (\$1,000)	61.41
Contract Labor Costs including Temporary Help (\$1,000)	26.08
Cost of Insurance (\$1,000)	11.78
Taxes and License Fees (\$1,000)	5.89
Lease and Rental Payments (\$1,000)	42.06

Cost of Services Estimates

The cost of transportation for this market in Czech Republic will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.00 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	8.41
Cost of Purchased Repair and Maintenance Services (\$1,000)	4.21
Cost of Purchased Printing Services (\$1,000)	5.89
Cost of Purchased Advertising and Promotional Services (\$1,000)	11.78
Cost of Purchased Legal Services (\$1,000)	6.73
Cost of Purchased Accounting and Auditing Services (\$1,000)	4.21

*2018-2019 Forecasts

Source: Barnes Reports

Denmark

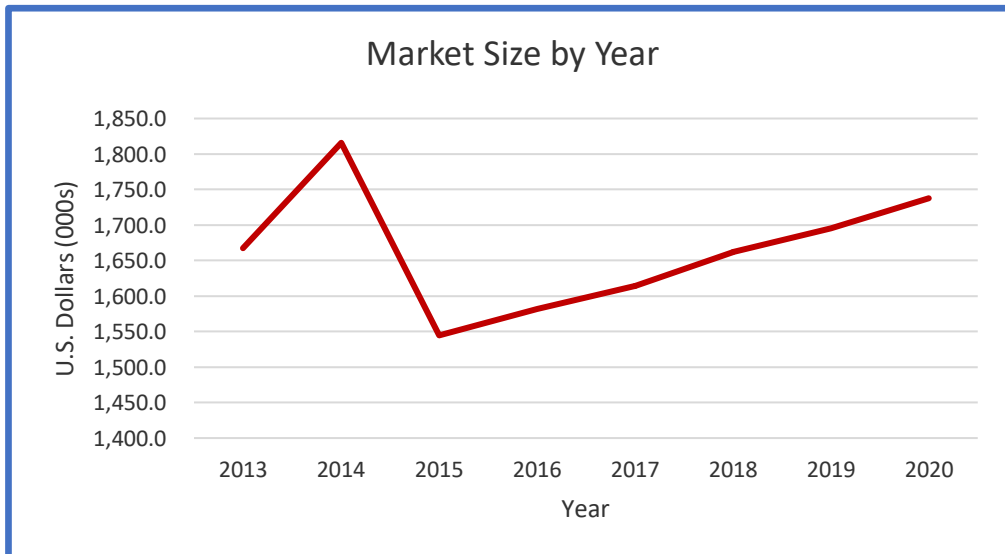
Service: Development and/or fundraising services

The market for this service in Denmark is estimated to be \$1.7 million dollars in 2019 and is expected to change by 2.5 percent from 2019 to 2020. The market will be 12.6 million Kroner in 2019 and is forecast to change by 6.2 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Krones
2013	1,667.0	9,362.4
2014	1,815.8	10,191.0
2015	1,544.6	10,392.0
2016	1,581.7	10,647.6
2017	1,614.0	11,336.7
2018	1,661.8	11,899.3
2019	1,695.3	12,631.3
2020	1,738.0	13,359.1
2025	1,950.9	17,344.9
Y-to-Y Change	US Dollars	Krones
2013-2014	8.9%	8.9%
2014-2015	-14.9%	2.0%
2015-2016	2.4%	2.5%
2016-2017	2.0%	6.5%
2017-2018	3.0%	5.0%
2018-2019	2.0%	6.2%
2019-2020	2.5%	5.8%
CAGR 2020-2025	2.4%	29.8%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Denmark

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Denmark will be \$0.78 million dollars in 2019 and the lease and rental payments for the market will be \$0.08 million dollars. The operating expenses for this market is expected to reach \$1.27 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	779.82
Operating Expenses (\$1,000)	1,274.83
Employer Costs for Fringe Benefits (\$1,000)	123.75
Contract Labor Costs including Temporary Help (\$1,000)	52.55
Cost of Insurance (\$1,000)	23.73
Taxes and License Fees (\$1,000)	11.87
Lease and Rental Payments (\$1,000)	84.76

Cost of Services Estimates

The cost of transportation for this market in Denmark will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	16.95
Cost of Purchased Repair and Maintenance Services (\$1,000)	8.48
Cost of Purchased Printing Services (\$1,000)	11.87
Cost of Purchased Advertising and Promotional Services (\$1,000)	23.73
Cost of Purchased Legal Services (\$1,000)	13.56
Cost of Purchased Accounting and Auditing Services (\$1,000)	8.48

*2018-2019 Forecasts

Source: Barnes Reports

Egypt

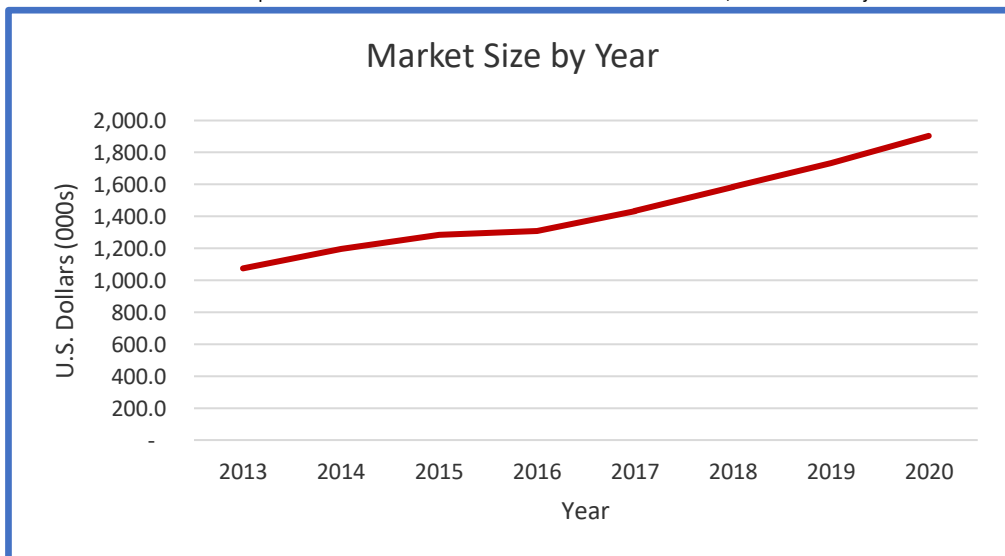
Service: Development and/or fundraising services

The market for this service in Egypt is estimated to be \$1.7 million dollars in 2019 and is expected to change by 9.9 percent from 2019 to 2020. The market will be 15.4 million Pounds in 2019 and is forecast to change by 14.6 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Pounds
2013	1,074.6	6,927.2
2014	1,197.9	8,351.2
2015	1,286.1	9,447.1
2016	1,309.9	10,659.9
2017	1,434.3	11,883.1
2018	1,583.3	13,470.3
2019	1,731.8	15,435.5
2020	1,903.7	18,009.6
2025	3,028.0	38,210.5
Y-to-Y Change	US Dollars	Pounds
2013-2014	11.5%	20.6%
2014-2015	7.4%	13.1%
2015-2016	1.8%	12.8%
2016-2017	9.5%	11.5%
2017-2018	10.4%	13.4%
2018-2019	9.4%	14.6%
2019-2020	9.9%	16.7%
CAGR 2020-2025	11.8%	112.2%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Egypt

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Egypt will be \$0.80 million dollars in 2019 and the lease and rental payments for the market will be \$0.09 million dollars. The operating expenses for this market is expected to reach \$1.30 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	796.65
Operating Expenses (\$1,000)	1,302.35
Employer Costs for Fringe Benefits (\$1,000)	126.42
Contract Labor Costs including Temporary Help (\$1,000)	53.69
Cost of Insurance (\$1,000)	24.25
Taxes and License Fees (\$1,000)	12.12
Lease and Rental Payments (\$1,000)	86.59

Cost of Services Estimates

The cost of transportation for this market in Egypt will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	17.32
Cost of Purchased Repair and Maintenance Services (\$1,000)	8.66
Cost of Purchased Printing Services (\$1,000)	12.12
Cost of Purchased Advertising and Promotional Services (\$1,000)	24.25
Cost of Purchased Legal Services (\$1,000)	13.85
Cost of Purchased Accounting and Auditing Services (\$1,000)	8.66

*2018-2019 Forecasts

Source: Barnes Reports

Finland

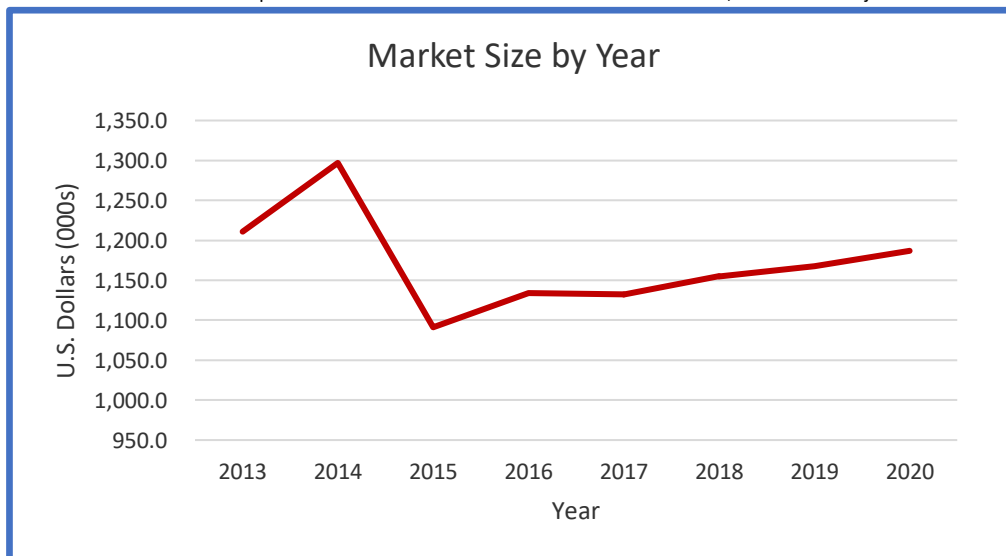
Service: Development and/or fundraising services

The market for this service in Finland is estimated to be \$1.2 million dollars in 2019 and is expected to change by 1.6 percent from 2019 to 2020. The market will be 1.2 million Euros in 2019 and is forecast to change by 5.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	1,211.2	912.2
2014	1,296.9	977.5
2015	1,091.2	983.9
2016	1,134.2	1,025.4
2017	1,132.2	1,068.5
2018	1,155.2	1,112.2
2019	1,167.9	1,170.7
2020	1,186.6	1,227.9
2025	1,273.1	1,528.7
Y-to-Y Change	US Dollars	Euros
2013-2014	7.1%	7.2%
2014-2015	-15.9%	0.6%
2015-2016	3.9%	4.2%
2016-2017	-0.2%	4.2%
2017-2018	2.0%	4.1%
2018-2019	1.1%	5.3%
2019-2020	1.6%	4.9%
CAGR 2020-2025	1.5%	24.5%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Finland

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Finland will be \$0.54 million dollars in 2019 and the lease and rental payments for the market will be \$0.06 million dollars. The operating expenses for this market is expected to reach \$0.88 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	537.23
Operating Expenses (\$1,000)	878.25
Employer Costs for Fringe Benefits (\$1,000)	85.26
Contract Labor Costs including Temporary Help (\$1,000)	36.20
Cost of Insurance (\$1,000)	16.35
Taxes and License Fees (\$1,000)	8.18
Lease and Rental Payments (\$1,000)	58.39

Cost of Services Estimates

The cost of transportation for this market in Finland will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	11.68
Cost of Purchased Repair and Maintenance Services (\$1,000)	5.84
Cost of Purchased Printing Services (\$1,000)	8.18
Cost of Purchased Advertising and Promotional Services (\$1,000)	16.35
Cost of Purchased Legal Services (\$1,000)	9.34
Cost of Purchased Accounting and Auditing Services (\$1,000)	5.84

*2018-2019 Forecasts

Source: Barnes Reports

France

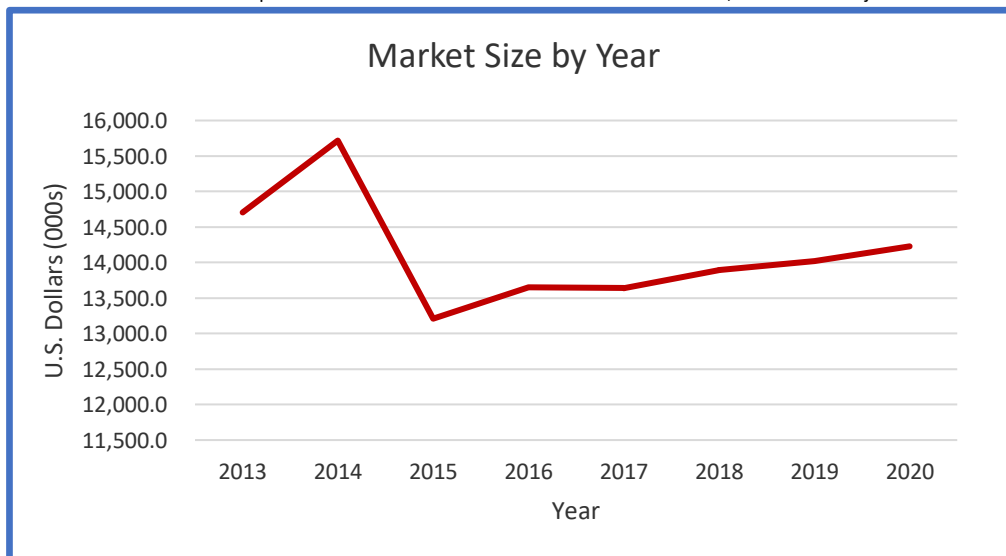
Service: Development and/or fundraising services

The market for this service in France is estimated to be \$14.0 million dollars in 2019 and is expected to change by 1.4 percent from 2019 to 2020. The market will be 14 million Euros in 2019 and is forecast to change by 5.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	14,704.0	11,074.5
2014	15,717.4	11,846.7
2015	13,209.3	11,910.3
2016	13,651.2	12,341.2
2017	13,638.2	12,862.0
2018	13,893.3	13,361.8
2019	14,023.9	14,038.2
2020	14,226.2	14,694.7
2025	15,144.3	18,120.2
Y-to-Y Change	US Dollars	Euros
2013-2014	6.9%	7.0%
2014-2015	-16.0%	0.5%
2015-2016	3.3%	3.6%
2016-2017	-0.1%	4.2%
2017-2018	1.9%	3.9%
2018-2019	0.9%	5.1%
2019-2020	1.4%	4.7%
CAGR 2020-2025	1.3%	23.3%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



France

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in France will be \$6.45 million dollars in 2019 and the lease and rental payments for the market will be \$0.70 million dollars. The operating expenses for this market is expected to reach \$10.55 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	6,451.01
Operating Expenses (\$1,000)	10,546.00
Employer Costs for Fringe Benefits (\$1,000)	1,023.75
Contract Labor Costs including Temporary Help (\$1,000)	434.74
Cost of Insurance (\$1,000)	196.34
Taxes and License Fees (\$1,000)	98.17
Lease and Rental Payments (\$1,000)	701.20

Cost of Services Estimates

The cost of transportation for this market in France will be \$0.14 million dollars in 2019 and the cost of printing services for the market will be \$0.10 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.07 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	140.24
Cost of Purchased Repair and Maintenance Services (\$1,000)	70.12
Cost of Purchased Printing Services (\$1,000)	98.17
Cost of Purchased Advertising and Promotional Services (\$1,000)	196.34
Cost of Purchased Legal Services (\$1,000)	112.19
Cost of Purchased Accounting and Auditing Services (\$1,000)	70.12

*2018-2019 Forecasts

Source: Barnes Reports

Germany

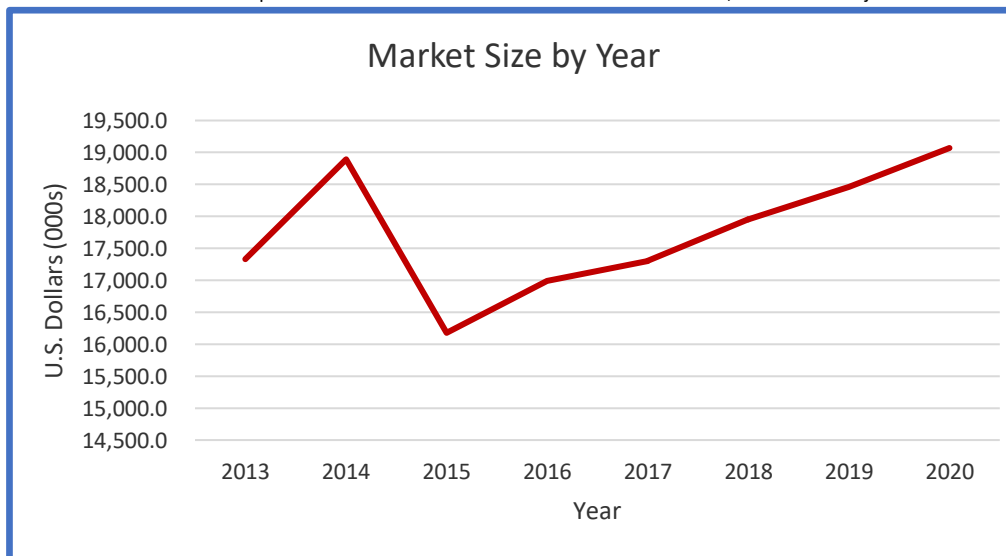
Service: Development and/or fundraising services

The market for this service in Germany is estimated to be \$18.5 million dollars in 2019 and is expected to change by 3.3 percent from 2019 to 2020. The market will be 18.6 million Euros in 2019 and is forecast to change by 7.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	17,326.1	13,049.3
2014	18,893.3	14,240.4
2015	16,177.7	14,586.8
2016	16,988.6	15,358.3
2017	17,304.9	16,355.4
2018	17,954.2	17,323.4
2019	18,457.7	18,556.5
2020	19,069.8	19,804.5
2025	22,245.5	26,906.0
Y-to-Y Change	US Dollars	Euros
2013-2014	9.0%	9.1%
2014-2015	-14.4%	2.4%
2015-2016	5.0%	5.3%
2016-2017	1.9%	6.5%
2017-2018	3.8%	5.9%
2018-2019	2.8%	7.1%
2019-2020	3.3%	6.7%
CAGR 2020-2025	3.3%	35.9%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Germany

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Germany will be \$8.49 million dollars in 2019 and the lease and rental payments for the market will be \$0.92 million dollars. The operating expenses for this market is expected to reach \$13.88 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	8,490.55
Operating Expenses (\$1,000)	13,880.21
Employer Costs for Fringe Benefits (\$1,000)	1,347.41
Contract Labor Costs including Temporary Help (\$1,000)	572.19
Cost of Insurance (\$1,000)	258.41
Taxes and License Fees (\$1,000)	129.20
Lease and Rental Payments (\$1,000)	922.89

Cost of Services Estimates

The cost of transportation for this market in Germany will be \$0.18 million dollars in 2019 and the cost of printing services for the market will be \$0.13 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.09 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	184.58
Cost of Purchased Repair and Maintenance Services (\$1,000)	92.29
Cost of Purchased Printing Services (\$1,000)	129.20
Cost of Purchased Advertising and Promotional Services (\$1,000)	258.41
Cost of Purchased Legal Services (\$1,000)	147.66
Cost of Purchased Accounting and Auditing Services (\$1,000)	92.29

*2018-2019 Forecasts

Source: Barnes Reports

Greece

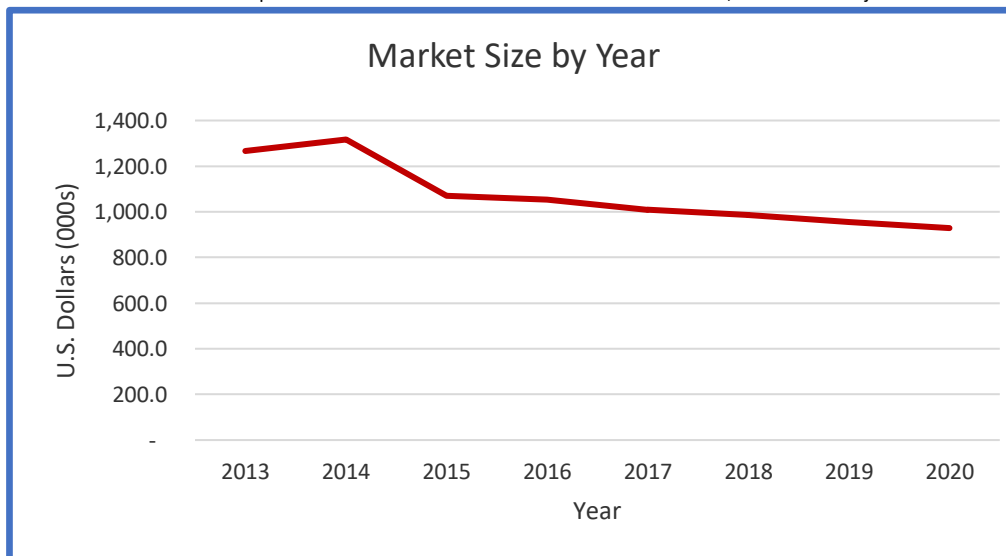
Service: Development and/or fundraising services

The market for this service in Greece is estimated to be \$1.0 million dollars in 2019 and is expected to change by -2.7 percent from 2019 to 2020. The market will be 1 million Euros in 2019 and is forecast to change by 1.5 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	1,265.1	952.9
2014	1,316.8	992.5
2015	1,069.9	964.7
2016	1,053.6	952.5
2017	1,009.3	966.9
2018	986.1	970.8
2019	954.5	985.8
2020	928.6	997.4
2025	801.9	1,037.4
Y-to-Y Change	US Dollars	Euros
2013-2014	4.1%	4.2%
2014-2015	-18.8%	-2.8%
2015-2016	-1.5%	-1.3%
2016-2017	-4.2%	1.5%
2017-2018	-2.3%	0.4%
2018-2019	-3.2%	1.5%
2019-2020	-2.7%	1.2%
CAGR 2020-2025	-2.7%	4.0%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Greece

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Greece will be \$0.44 million dollars in 2019 and the lease and rental payments for the market will be \$0.05 million dollars. The operating expenses for this market is expected to reach \$0.72 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	439.09
Operating Expenses (\$1,000)	717.82
Employer Costs for Fringe Benefits (\$1,000)	69.68
Contract Labor Costs including Temporary Help (\$1,000)	29.59
Cost of Insurance (\$1,000)	13.36
Taxes and License Fees (\$1,000)	6.68
Lease and Rental Payments (\$1,000)	47.73

Cost of Services Estimates

The cost of transportation for this market in Greece will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.00 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	9.55
Cost of Purchased Repair and Maintenance Services (\$1,000)	4.77
Cost of Purchased Printing Services (\$1,000)	6.68
Cost of Purchased Advertising and Promotional Services (\$1,000)	13.36
Cost of Purchased Legal Services (\$1,000)	7.64
Cost of Purchased Accounting and Auditing Services (\$1,000)	4.77

*2018-2019 Forecasts

Source: Barnes Reports

India

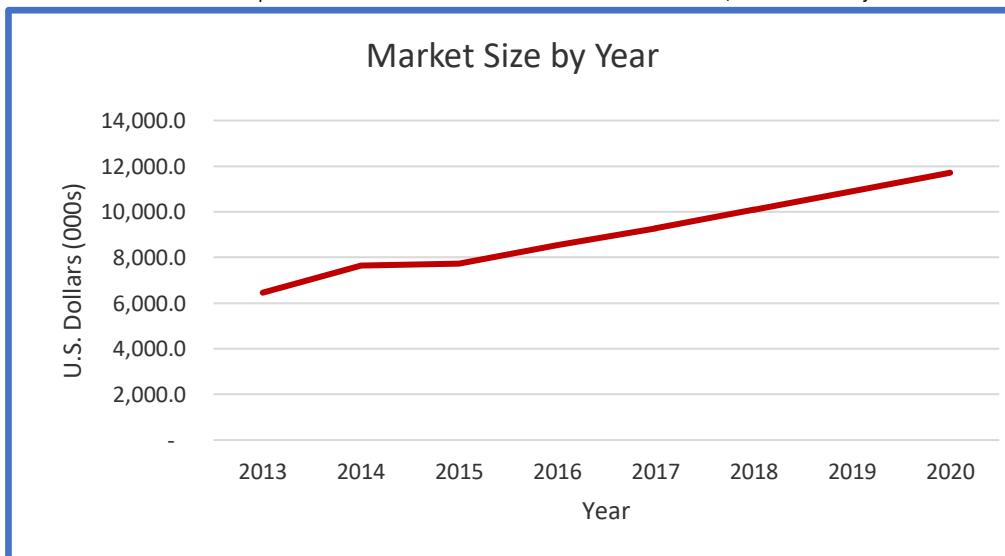
Service: Development and/or fundraising services

The market for this service in India is estimated to be \$10.9 million dollars in 2019 and is expected to change by 7.5 percent from 2019 to 2020. The market will be 860.8 million Rupees in 2019 and is forecast to change by 15.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Rupees
2013	6,457.1	390,664.1
2014	7,632.8	466,694.5
2015	7,741.2	506,807.3
2016	8,532.5	572,290.2
2017	9,279.6	657,052.6
2018	10,095.4	747,814.3
2019	10,891.6	860,753.3
2020	11,712.0	987,112.5
2025	17,522.2	1,921,139.0
Y-to-Y Change	US Dollars	Rupees
2013-2014	18.2%	19.5%
2014-2015	1.4%	8.6%
2015-2016	10.2%	12.9%
2016-2017	8.8%	14.8%
2017-2018	8.8%	13.8%
2018-2019	7.9%	15.1%
2019-2020	7.5%	14.7%
CAGR 2020-2025	9.9%	94.6%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



India

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in India will be \$5.01 million dollars in 2019 and the lease and rental payments for the market will be \$0.54 million dollars. The operating expenses for this market is expected to reach \$8.19 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	5,010.15
Operating Expenses (\$1,000)	8,190.51
Employer Costs for Fringe Benefits (\$1,000)	795.09
Contract Labor Costs including Temporary Help (\$1,000)	337.64
Cost of Insurance (\$1,000)	152.48
Taxes and License Fees (\$1,000)	76.24
Lease and Rental Payments (\$1,000)	544.58

Cost of Services Estimates

The cost of transportation for this market in India will be \$0.11 million dollars in 2019 and the cost of printing services for the market will be \$0.08 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.05 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	108.92
Cost of Purchased Repair and Maintenance Services (\$1,000)	54.46
Cost of Purchased Printing Services (\$1,000)	76.24
Cost of Purchased Advertising and Promotional Services (\$1,000)	152.48
Cost of Purchased Legal Services (\$1,000)	87.13
Cost of Purchased Accounting and Auditing Services (\$1,000)	54.46

*2018-2019 Forecasts

Source: Barnes Reports

Indonesia

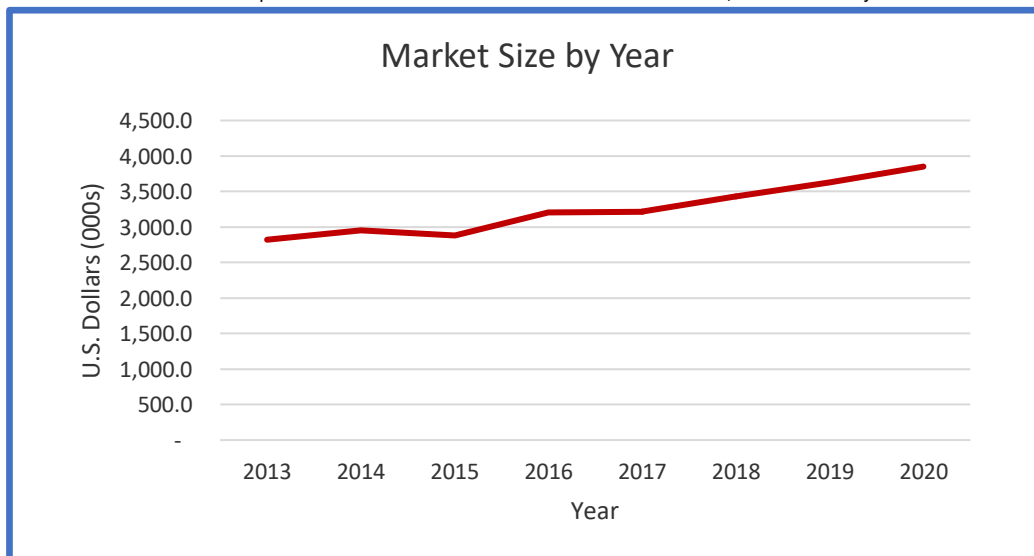
Service: Development and/or fundraising services

The market for this service in Indonesia is estimated to be \$3.6 million dollars in 2019 and is expected to change by 6.2 percent from 2019 to 2020. The market will be 63617.6 million Rupiahs in 2019 and is forecast to change by 14.6 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Rupiahs
2013	2,821.3	29,514,217.1
2014	2,950.8	35,011,528.3
2015	2,883.7	38,611,702.3
2016	3,204.1	42,641,450.1
2017	3,217.5	48,989,526.6
2018	3,431.5	55,512,993.2
2019	3,626.2	63,617,607.8
2020	3,851.1	72,637,864.1
2025	5,155.6	138,306,965.3
Y-to-Y Change	US Dollars	Rupiahs
2013-2014	4.6%	18.6%
2014-2015	-2.3%	10.3%
2015-2016	11.1%	10.4%
2016-2017	0.4%	14.9%
2017-2018	6.6%	13.3%
2018-2019	5.7%	14.6%
2019-2020	6.2%	14.2%
CAGR 2020-2025	6.8%	90.4%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Indonesia

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Indonesia will be \$1.67 million dollars in 2019 and the lease and rental payments for the market will be \$0.18 million dollars. The operating expenses for this market is expected to reach \$2.73 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,668.06
Operating Expenses (\$1,000)	2,726.91
Employer Costs for Fringe Benefits (\$1,000)	264.71
Contract Labor Costs including Temporary Help (\$1,000)	112.41
Cost of Insurance (\$1,000)	50.77
Taxes and License Fees (\$1,000)	25.38
Lease and Rental Payments (\$1,000)	181.31

Cost of Services Estimates

The cost of transportation for this market in Indonesia will be \$0.04 million dollars in 2019 and the cost of printing services for the market will be \$0.03 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.02 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	36.26
Cost of Purchased Repair and Maintenance Services (\$1,000)	18.13
Cost of Purchased Printing Services (\$1,000)	25.38
Cost of Purchased Advertising and Promotional Services (\$1,000)	50.77
Cost of Purchased Legal Services (\$1,000)	29.01
Cost of Purchased Accounting and Auditing Services (\$1,000)	18.13

*2018-2019 Forecasts

Source: Barnes Reports

Iran

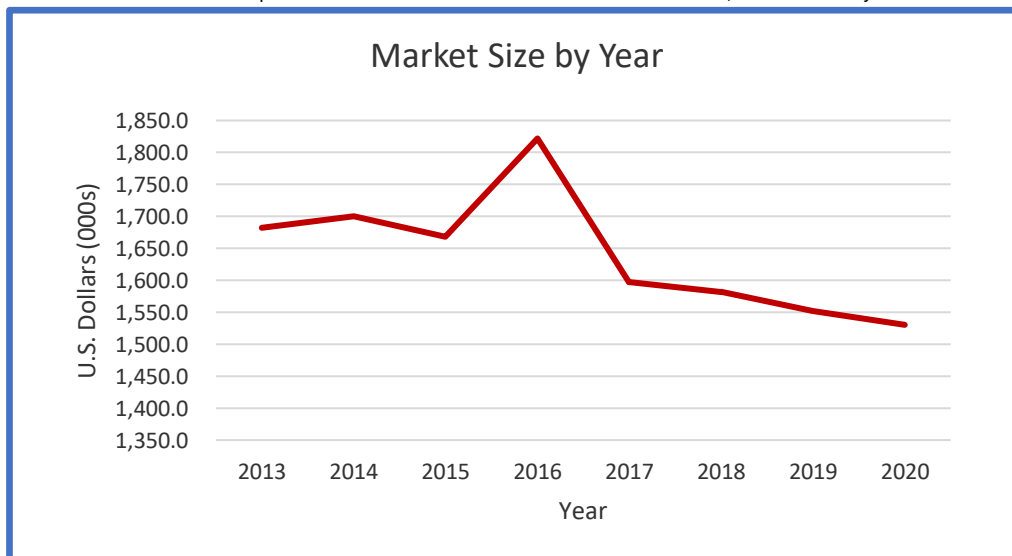
Service: Development and/or fundraising services

The market for this service in Iran is estimated to be \$1.6 million dollars in 2019 and is expected to change by -1.4 percent from 2019 to 2020. The market will be 85823 million Rials in 2019 and is forecast to change by 15.7 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Rials
2013	1,682.6	35,759,275.6
2014	1,700.2	45,071,187.9
2015	1,667.8	49,334,473.2
2016	1,821.9	57,187,626.8
2017	1,597.2	64,820,412.4
2018	1,581.6	74,167,227.8
2019	1,551.9	85,822,979.9
2020	1,530.3	98,945,984.6
2025	1,413.9	197,753,159.6
Y-to-Y Change	US Dollars	Rials
2013-2014	1.1%	26.0%
2014-2015	-1.9%	9.5%
2015-2016	9.2%	15.9%
2016-2017	-12.3%	13.3%
2017-2018	-1.0%	14.4%
2018-2019	-1.9%	15.7%
2019-2020	-1.4%	15.3%
CAGR 2020-2025	-1.5%	99.9%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Iran

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Iran will be \$0.71 million dollars in 2019 and the lease and rental payments for the market will be \$0.08 million dollars. The operating expenses for this market is expected to reach \$1.17 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	713.86
Operating Expenses (\$1,000)	1,167.01
Employer Costs for Fringe Benefits (\$1,000)	113.29
Contract Labor Costs including Temporary Help (\$1,000)	48.11
Cost of Insurance (\$1,000)	21.73
Taxes and License Fees (\$1,000)	10.86
Lease and Rental Payments (\$1,000)	77.59

Cost of Services Estimates

The cost of transportation for this market in Iran will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	15.52
Cost of Purchased Repair and Maintenance Services (\$1,000)	7.76
Cost of Purchased Printing Services (\$1,000)	10.86
Cost of Purchased Advertising and Promotional Services (\$1,000)	21.73
Cost of Purchased Legal Services (\$1,000)	12.41
Cost of Purchased Accounting and Auditing Services (\$1,000)	7.76

*2018-2019 Forecasts

Source: Barnes Reports

Iraq

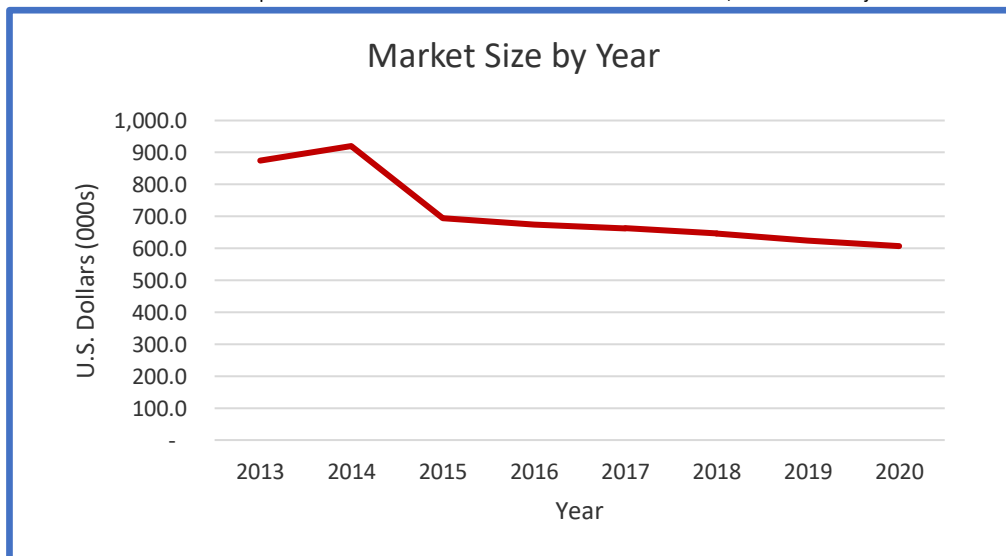
Service: Development and/or fundraising services

The market for this service in Iraq is estimated to be \$0.6 million dollars in 2019 and is expected to change by -2.9 percent from 2019 to 2020. The market will be 650.1 million Dinars in 2019 and is forecast to change by -6.4 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Dinars
2013	873.7	1,018,752.6
2014	920.0	1,072,723.8
2015	694.4	810,614.6
2016	675.0	797,826.1
2017	663.2	750,851.0
2018	646.7	694,882.1
2019	624.9	650,141.7
2020	606.9	594,929.2
2025	519.5	374,544.7
Y-to-Y Change	US Dollars	Dinars
2013-2014	5.3%	5.3%
2014-2015	-24.5%	-24.4%
2015-2016	-2.8%	-1.6%
2016-2017	-1.8%	-5.9%
2017-2018	-2.5%	-7.5%
2018-2019	-3.4%	-6.4%
2019-2020	-2.9%	-8.5%
CAGR 2020-2025	-2.9%	-37.0%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Iraq

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Iraq will be \$0.29 million dollars in 2019 and the lease and rental payments for the market will be \$0.03 million dollars. The operating expenses for this market is expected to reach \$0.47 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	287.48
Operating Expenses (\$1,000)	469.96
Employer Costs for Fringe Benefits (\$1,000)	45.62
Contract Labor Costs including Temporary Help (\$1,000)	19.37
Cost of Insurance (\$1,000)	8.75
Taxes and License Fees (\$1,000)	4.37
Lease and Rental Payments (\$1,000)	31.25

Cost of Services Estimates

The cost of transportation for this market in Iraq will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.00 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.00 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	6.25
Cost of Purchased Repair and Maintenance Services (\$1,000)	3.12
Cost of Purchased Printing Services (\$1,000)	4.37
Cost of Purchased Advertising and Promotional Services (\$1,000)	8.75
Cost of Purchased Legal Services (\$1,000)	5.00
Cost of Purchased Accounting and Auditing Services (\$1,000)	3.12

*2018-2019 Forecasts

Source: Barnes Reports

Ireland

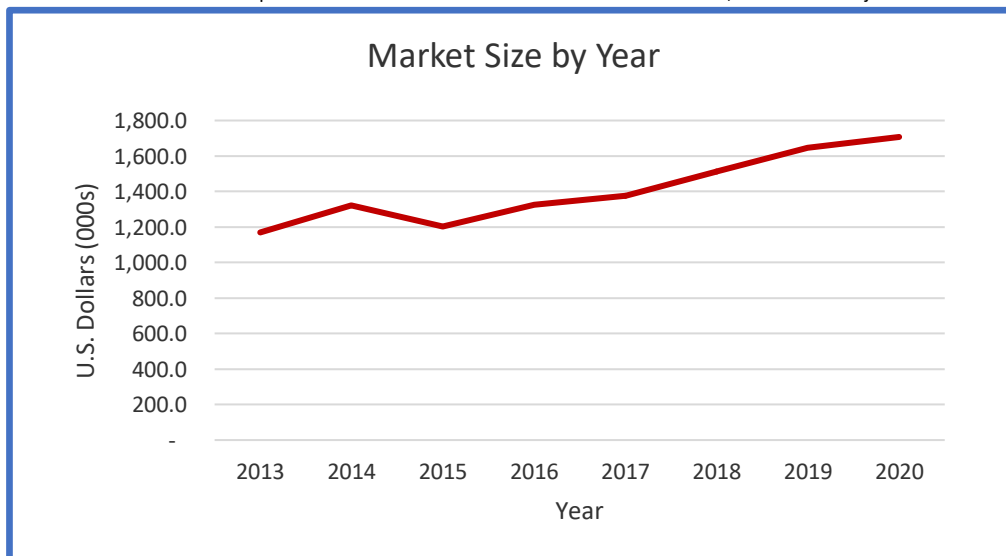
Service: Development and/or fundraising services

The market for this service in Ireland is estimated to be \$1.6 million dollars in 2019 and is expected to change by 3.7 percent from 2019 to 2020. The market will be 1.9 million Euros in 2019 and is forecast to change by 17.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	1,169.5	880.8
2014	1,320.1	995.0
2015	1,203.2	1,084.9
2016	1,326.7	1,199.4
2017	1,375.5	1,387.0
2018	1,512.4	1,612.9
2019	1,645.7	1,892.2
2020	1,707.2	2,162.0
2025	2,044.6	4,130.6
Y-to-Y Change	US Dollars	Euros
2013-2014	12.9%	13.0%
2014-2015	-8.9%	9.0%
2015-2016	10.3%	10.6%
2016-2017	3.7%	15.6%
2017-2018	10.0%	16.3%
2018-2019	8.8%	17.3%
2019-2020	3.7%	14.3%
CAGR 2020-2025	4.0%	91.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Ireland

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Ireland will be \$0.76 million dollars in 2019 and the lease and rental payments for the market will be \$0.08 million dollars. The operating expenses for this market is expected to reach \$1.24 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	757.02
Operating Expenses (\$1,000)	1,237.56
Employer Costs for Fringe Benefits (\$1,000)	120.14
Contract Labor Costs including Temporary Help (\$1,000)	51.02
Cost of Insurance (\$1,000)	23.04
Taxes and License Fees (\$1,000)	11.52
Lease and Rental Payments (\$1,000)	82.28

Cost of Services Estimates

The cost of transportation for this market in Ireland will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	16.46
Cost of Purchased Repair and Maintenance Services (\$1,000)	8.23
Cost of Purchased Printing Services (\$1,000)	11.52
Cost of Purchased Advertising and Promotional Services (\$1,000)	23.04
Cost of Purchased Legal Services (\$1,000)	13.17
Cost of Purchased Accounting and Auditing Services (\$1,000)	8.23

*2018-2019 Forecasts

Source: Barnes Reports

Israel

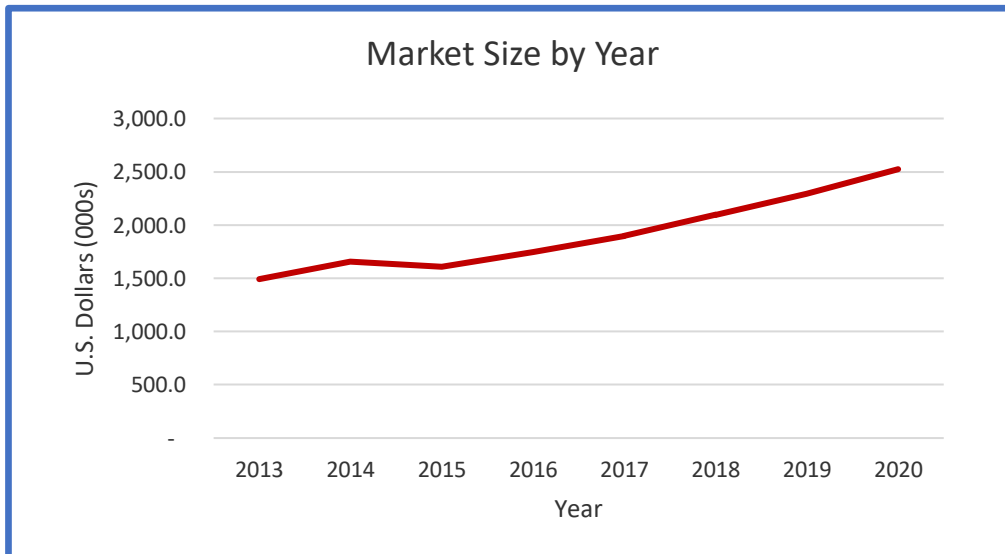
Service: Development and/or fundraising services

The market for this service in Israel is estimated to be \$2.3 million dollars in 2019 and is expected to change by 10 percent from 2019 to 2020. The market will be 8.5 million New Shekels in 2019 and is forecast to change by 8.9 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	New Shekels
2013	1,492.1	5,387.8
2014	1,656.1	5,925.3
2015	1,609.0	6,253.8
2016	1,745.0	6,701.8
2017	1,898.8	7,229.1
2018	2,097.1	7,785.0
2019	2,294.9	8,478.6
2020	2,523.9	9,200.2
2025	4,024.4	13,580.1
Y-to-Y Change	US Dollars	New Shekels
2013-2014	11.0%	10.0%
2014-2015	-2.8%	5.5%
2015-2016	8.5%	7.2%
2016-2017	8.8%	7.9%
2017-2018	10.4%	7.7%
2018-2019	9.4%	8.9%
2019-2020	10.0%	8.5%
CAGR 2020-2025	11.9%	47.6%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Israel

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Israel will be \$1.06 million dollars in 2019 and the lease and rental payments for the market will be \$0.11 million dollars. The operating expenses for this market is expected to reach \$1.73 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,055.66
Operating Expenses (\$1,000)	1,725.78
Employer Costs for Fringe Benefits (\$1,000)	167.53
Contract Labor Costs including Temporary Help (\$1,000)	71.14
Cost of Insurance (\$1,000)	32.13
Taxes and License Fees (\$1,000)	16.06
Lease and Rental Payments (\$1,000)	114.75

Cost of Services Estimates

The cost of transportation for this market in Israel will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.02 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	22.95
Cost of Purchased Repair and Maintenance Services (\$1,000)	11.47
Cost of Purchased Printing Services (\$1,000)	16.06
Cost of Purchased Advertising and Promotional Services (\$1,000)	32.13
Cost of Purchased Legal Services (\$1,000)	18.36
Cost of Purchased Accounting and Auditing Services (\$1,000)	11.47

*2018-2019 Forecasts

Source: Barnes Reports

Italy

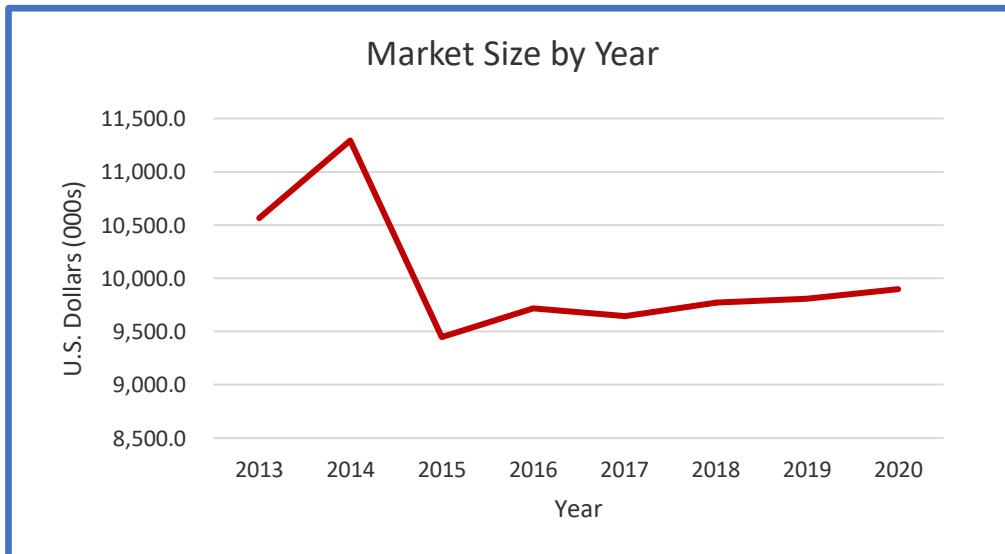
Service: Development and/or fundraising services

The market for this service in Italy is estimated to be \$9.8 million dollars in 2019 and is expected to change by 0.9 percent from 2019 to 2020. The market will be 10 million Euros in 2019 and is forecast to change by 4.9 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	10,562.7	7,955.4
2014	11,293.3	8,512.1
2015	9,448.1	8,518.9
2016	9,717.9	8,785.3
2017	9,643.6	9,161.2
2018	9,770.5	9,499.9
2019	9,808.7	9,962.8
2020	9,896.1	10,409.8
2025	10,251.2	12,720.4
Y-to-Y Change	US Dollars	Euros
2013-2014	6.9%	7.0%
2014-2015	-16.3%	0.1%
2015-2016	2.9%	3.1%
2016-2017	-0.8%	4.3%
2017-2018	1.3%	3.7%
2018-2019	0.4%	4.9%
2019-2020	0.9%	4.5%
CAGR 2020-2025	0.7%	22.2%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Italy

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Italy will be \$4.51 million dollars in 2019 and the lease and rental payments for the market will be \$0.49 million dollars. The operating expenses for this market is expected to reach \$7.38 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	4,512.02
Operating Expenses (\$1,000)	7,376.18
Employer Costs for Fringe Benefits (\$1,000)	716.04
Contract Labor Costs including Temporary Help (\$1,000)	304.07
Cost of Insurance (\$1,000)	137.32
Taxes and License Fees (\$1,000)	68.66
Lease and Rental Payments (\$1,000)	490.44

Cost of Services Estimates

The cost of transportation for this market in Italy will be \$0.10 million dollars in 2019 and the cost of printing services for the market will be \$0.07 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.05 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	98.09
Cost of Purchased Repair and Maintenance Services (\$1,000)	49.04
Cost of Purchased Printing Services (\$1,000)	68.66
Cost of Purchased Advertising and Promotional Services (\$1,000)	137.32
Cost of Purchased Legal Services (\$1,000)	78.47
Cost of Purchased Accounting and Auditing Services (\$1,000)	49.04

*2018-2019 Forecasts

Source: Barnes Reports

Japan

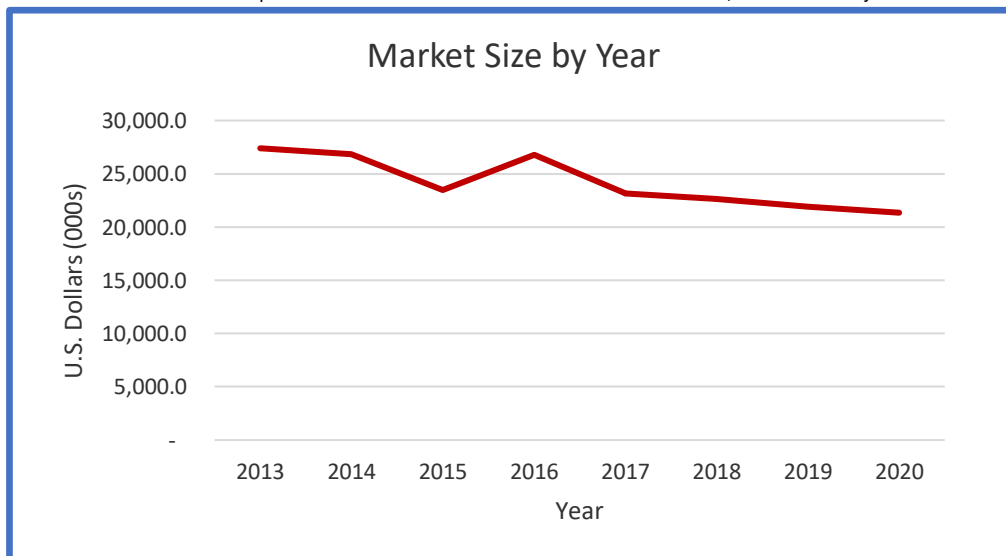
Service: Development and/or fundraising services

The market for this service in Japan is estimated to be \$21.9 million dollars in 2019 and is expected to change by -2.6 percent from 2019 to 2020. The market will be 3275 million Yens in 2019 and is forecast to change by 4.5 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Yens
2013	27,393.5	2,673,489.7
2014	26,809.6	2,840,341.3
2015	23,495.7	2,844,013.4
2016	26,796.3	2,915,242.4
2017	23,152.2	3,032,056.3
2018	22,634.1	3,133,479.9
2019	21,925.4	3,274,974.0
2020	21,344.6	3,410,294.2
2025	18,494.8	4,096,982.4
Y-to-Y Change	US Dollars	Yens
2013-2014	-2.1%	6.2%
2014-2015	-12.4%	0.1%
2015-2016	14.0%	2.5%
2016-2017	-13.6%	4.0%
2017-2018	-2.2%	3.3%
2018-2019	-3.1%	4.5%
2019-2020	-2.6%	4.1%
CAGR 2020-2025	-2.7%	20.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Japan

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Japan will be \$10.09 million dollars in 2019 and the lease and rental payments for the market will be \$1.10 million dollars. The operating expenses for this market is expected to reach \$16.49 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	10,085.70
Operating Expenses (\$1,000)	16,487.93
Employer Costs for Fringe Benefits (\$1,000)	1,600.56
Contract Labor Costs including Temporary Help (\$1,000)	679.69
Cost of Insurance (\$1,000)	306.96
Taxes and License Fees (\$1,000)	153.48
Lease and Rental Payments (\$1,000)	1,096.27

Cost of Services Estimates

The cost of transportation for this market in Japan will be \$0.22 million dollars in 2019 and the cost of printing services for the market will be \$0.15 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.11 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	219.25
Cost of Purchased Repair and Maintenance Services (\$1,000)	109.63
Cost of Purchased Printing Services (\$1,000)	153.48
Cost of Purchased Advertising and Promotional Services (\$1,000)	306.96
Cost of Purchased Legal Services (\$1,000)	175.40
Cost of Purchased Accounting and Auditing Services (\$1,000)	109.63

*2018-2019 Forecasts

Source: Barnes Reports

South Korea

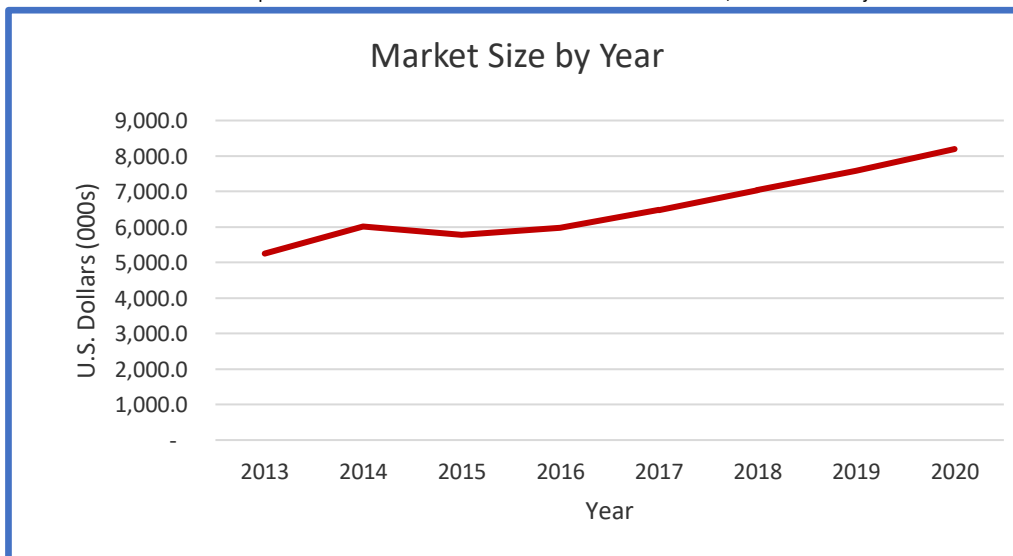
Service: Development and/or fundraising services

The market for this service in South Korea is estimated to be \$7.6 million dollars in 2019 and is expected to change by 8.2 percent from 2019 to 2020. The market will be 8567.5 million Wons in 2019 and is forecast to change by 7.9 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Wons
2013	5,252.3	5,750,471.7
2014	6,014.5	6,333,023.3
2015	5,777.4	6,535,128.9
2016	5,971.2	6,928,236.1
2017	6,475.1	7,437,095.0
2018	7,035.7	7,937,481.7
2019	7,575.0	8,567,486.6
2020	8,196.2	9,213,553.8
2025	12,045.6	13,003,138.9
Y-to-Y Change	US Dollars	Wons
2013-2014	14.5%	10.1%
2014-2015	-3.9%	3.2%
2015-2016	3.4%	6.0%
2016-2017	8.4%	7.3%
2017-2018	8.7%	6.7%
2018-2019	7.7%	7.9%
2019-2020	8.2%	7.5%
CAGR 2020-2025	9.4%	41.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



South Korea

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in South Korea will be \$3.48 million dollars in 2019 and the lease and rental payments for the market will be \$0.38 million dollars. The operating expenses for this market is expected to reach \$5.70 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	3,484.50
Operating Expenses (\$1,000)	5,696.39
Employer Costs for Fringe Benefits (\$1,000)	552.97
Contract Labor Costs including Temporary Help (\$1,000)	234.82
Cost of Insurance (\$1,000)	106.05
Taxes and License Fees (\$1,000)	53.02
Lease and Rental Payments (\$1,000)	378.75

Cost of Services Estimates

The cost of transportation for this market in South Korea will be \$0.08 million dollars in 2019 and the cost of printing services for the market will be \$0.05 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.04 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	75.75
Cost of Purchased Repair and Maintenance Services (\$1,000)	37.87
Cost of Purchased Printing Services (\$1,000)	53.02
Cost of Purchased Advertising and Promotional Services (\$1,000)	106.05
Cost of Purchased Legal Services (\$1,000)	60.60
Cost of Purchased Accounting and Auditing Services (\$1,000)	37.87

*2018-2019 Forecasts

Source: Barnes Reports

Malaysia

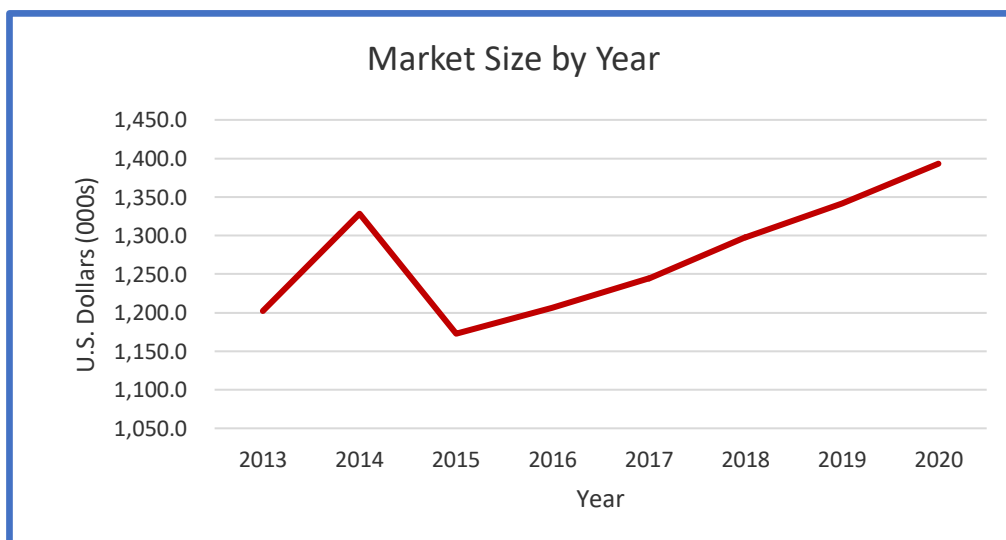
Service: Development and/or fundraising services

The market for this service in Malaysia is estimated to be \$1.3 million dollars in 2019 and is expected to change by 3.9 percent from 2019 to 2020. The market will be 6.8 million Ringgits in 2019 and is forecast to change by 11.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Ringgits
2013	1,202.4	3,788.6
2014	1,328.7	4,348.8
2015	1,172.7	4,580.1
2016	1,206.0	5,002.9
2017	1,244.2	5,534.8
2018	1,297.8	6,082.2
2019	1,341.3	6,759.3
2020	1,393.2	7,484.3
2025	1,669.0	12,222.1
Y-to-Y Change	US Dollars	Ringgits
2013-2014	10.5%	14.8%
2014-2015	-11.7%	5.3%
2015-2016	2.8%	9.2%
2016-2017	3.2%	10.6%
2017-2018	4.3%	9.9%
2018-2019	3.4%	11.1%
2019-2020	3.9%	10.7%
CAGR 2020-2025	4.0%	63.3%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Malaysia

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Malaysia will be \$0.62 million dollars in 2019 and the lease and rental payments for the market will be \$0.07 million dollars. The operating expenses for this market is expected to reach \$1.01 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	617.01
Operating Expenses (\$1,000)	1,008.68
Employer Costs for Fringe Benefits (\$1,000)	97.92
Contract Labor Costs including Temporary Help (\$1,000)	41.58
Cost of Insurance (\$1,000)	18.78
Taxes and License Fees (\$1,000)	9.39
Lease and Rental Payments (\$1,000)	67.07

Cost of Services Estimates

The cost of transportation for this market in Malaysia will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	13.41
Cost of Purchased Repair and Maintenance Services (\$1,000)	6.71
Cost of Purchased Printing Services (\$1,000)	9.39
Cost of Purchased Advertising and Promotional Services (\$1,000)	18.78
Cost of Purchased Legal Services (\$1,000)	10.73
Cost of Purchased Accounting and Auditing Services (\$1,000)	6.71

*2018-2019 Forecasts

Source: Barnes Reports

Mexico

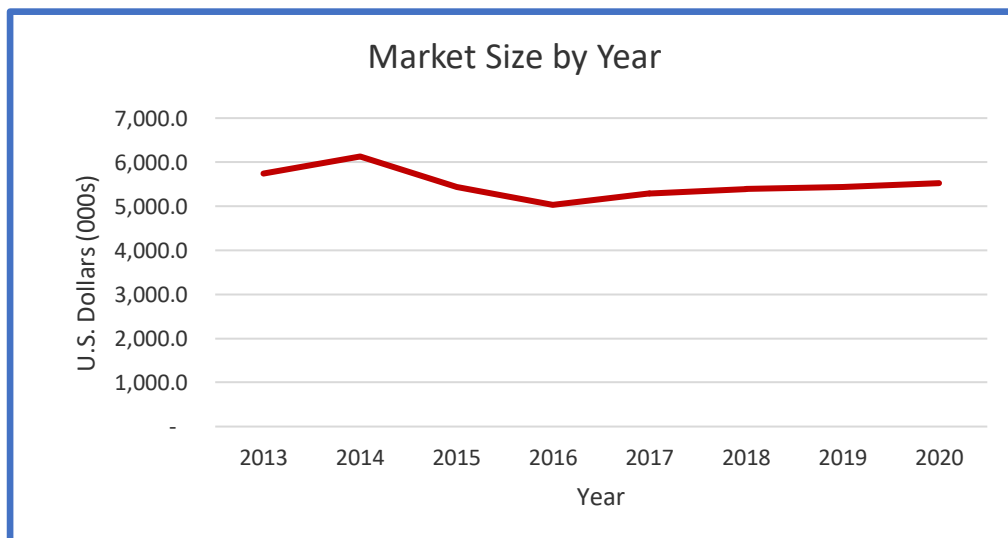
Service: Development and/or fundraising services

The market for this service in Mexico is estimated to be \$5.4 million dollars in 2019 and is expected to change by 1.5 percent from 2019 to 2020. The market will be 123.6 million Pesos in 2019 and is forecast to change by 10.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Pesos
2013	5,742.8	73,346.8
2014	6,128.9	81,468.5
2015	5,436.4	86,157.9
2016	5,031.7	93,911.4
2017	5,288.6	102,732.7
2018	5,389.2	112,071.2
2019	5,441.5	123,643.2
2020	5,521.7	135,909.5
2025	5,887.2	213,992.8
Y-to-Y Change	US Dollars	Pesos
2013-2014	6.7%	11.1%
2014-2015	-11.3%	5.8%
2015-2016	-7.4%	9.0%
2016-2017	5.1%	9.4%
2017-2018	1.9%	9.1%
2018-2019	1.0%	10.3%
2019-2020	1.5%	9.9%
CAGR 2020-2025	1.3%	57.5%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Mexico

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Mexico will be \$2.50 million dollars in 2019 and the lease and rental payments for the market will be \$0.27 million dollars. The operating expenses for this market is expected to reach \$4.09 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	2,503.11
Operating Expenses (\$1,000)	4,092.04
Employer Costs for Fringe Benefits (\$1,000)	397.23
Contract Labor Costs including Temporary Help (\$1,000)	168.69
Cost of Insurance (\$1,000)	76.18
Taxes and License Fees (\$1,000)	38.09
Lease and Rental Payments (\$1,000)	272.08

Cost of Services Estimates

The cost of transportation for this market in Mexico will be \$0.05 million dollars in 2019 and the cost of printing services for the market will be \$0.04 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.03 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	54.42
Cost of Purchased Repair and Maintenance Services (\$1,000)	27.21
Cost of Purchased Printing Services (\$1,000)	38.09
Cost of Purchased Advertising and Promotional Services (\$1,000)	76.18
Cost of Purchased Legal Services (\$1,000)	43.53
Cost of Purchased Accounting and Auditing Services (\$1,000)	27.21

*2018-2019 Forecasts

Source: Barnes Reports

Netherlands

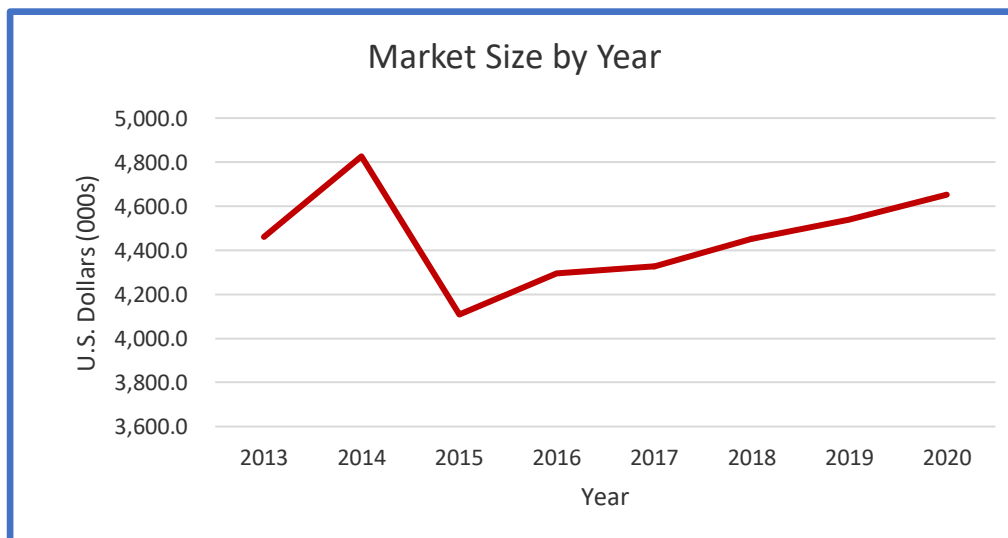
Service: Development and/or fundraising services

The market for this service in Netherlands is estimated to be \$4.5 million dollars in 2019 and is expected to change by 2.5 percent from 2019 to 2020. The market will be 4.6 million Euros in 2019 and is forecast to change by 6.4 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	4,461.6	3,360.3
2014	4,826.4	3,637.8
2015	4,108.6	3,704.5
2016	4,295.6	3,883.3
2017	4,326.5	4,100.4
2018	4,452.1	4,313.3
2019	4,539.4	4,588.8
2020	4,651.5	4,863.9
2025	5,207.3	6,385.2
Y-to-Y Change	US Dollars	Euros
2013-2014	8.2%	8.3%
2014-2015	-14.9%	1.8%
2015-2016	4.6%	4.8%
2016-2017	0.7%	5.6%
2017-2018	2.9%	5.2%
2018-2019	2.0%	6.4%
2019-2020	2.5%	6.0%
CAGR 2020-2025	2.4%	31.3%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Netherlands

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Netherlands will be \$2.09 million dollars in 2019 and the lease and rental payments for the market will be \$0.23 million dollars. The operating expenses for this market is expected to reach \$3.41 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	2,088.12
Operating Expenses (\$1,000)	3,413.63
Employer Costs for Fringe Benefits (\$1,000)	331.38
Contract Labor Costs including Temporary Help (\$1,000)	140.72
Cost of Insurance (\$1,000)	63.55
Taxes and License Fees (\$1,000)	31.78
Lease and Rental Payments (\$1,000)	226.97

Cost of Services Estimates

The cost of transportation for this market in Netherlands will be \$0.05 million dollars in 2019 and the cost of printing services for the market will be \$0.03 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.02 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	45.39
Cost of Purchased Repair and Maintenance Services (\$1,000)	22.70
Cost of Purchased Printing Services (\$1,000)	31.78
Cost of Purchased Advertising and Promotional Services (\$1,000)	63.55
Cost of Purchased Legal Services (\$1,000)	36.32
Cost of Purchased Accounting and Auditing Services (\$1,000)	22.70

*2018-2019 Forecasts

Source: Barnes Reports

Nigeria

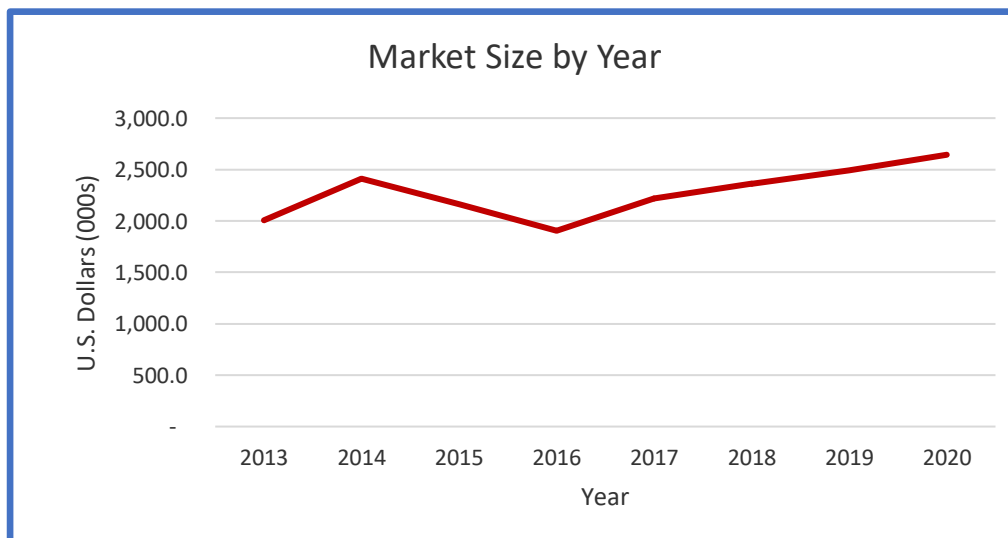
Service: Development and/or fundraising services

The market for this service in Nigeria is estimated to be \$2.5 million dollars in 2019 and is expected to change by 6 percent from 2019 to 2020. The market will be 758.1 million Nairas in 2019 and is forecast to change by 16.6 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Nairas
2013	2,008.2	315,918.8
2014	2,414.1	382,761.6
2015	2,161.7	427,684.6
2016	1,904.4	482,748.3
2017	2,218.7	563,596.5
2018	2,362.7	649,987.2
2019	2,493.0	758,110.7
2020	2,643.7	880,974.8
2025	3,512.9	1,831,766.6
Y-to-Y Change	US Dollars	Nairas
2013-2014	20.2%	21.2%
2014-2015	-10.5%	11.7%
2015-2016	-11.9%	12.9%
2016-2017	16.5%	16.7%
2017-2018	6.5%	15.3%
2018-2019	5.5%	16.6%
2019-2020	6.0%	16.2%
CAGR 2020-2025	6.6%	107.9%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Nigeria

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Nigeria will be \$1.15 million dollars in 2019 and the lease and rental payments for the market will be \$0.12 million dollars. The operating expenses for this market is expected to reach \$1.87 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,146.80
Operating Expenses (\$1,000)	1,874.77
Employer Costs for Fringe Benefits (\$1,000)	181.99
Contract Labor Costs including Temporary Help (\$1,000)	77.28
Cost of Insurance (\$1,000)	34.90
Taxes and License Fees (\$1,000)	17.45
Lease and Rental Payments (\$1,000)	124.65

Cost of Services Estimates

The cost of transportation for this market in Nigeria will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.02 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	24.93
Cost of Purchased Repair and Maintenance Services (\$1,000)	12.47
Cost of Purchased Printing Services (\$1,000)	17.45
Cost of Purchased Advertising and Promotional Services (\$1,000)	34.90
Cost of Purchased Legal Services (\$1,000)	19.94
Cost of Purchased Accounting and Auditing Services (\$1,000)	12.47

*2018-2019 Forecasts

Source: Barnes Reports

Norway

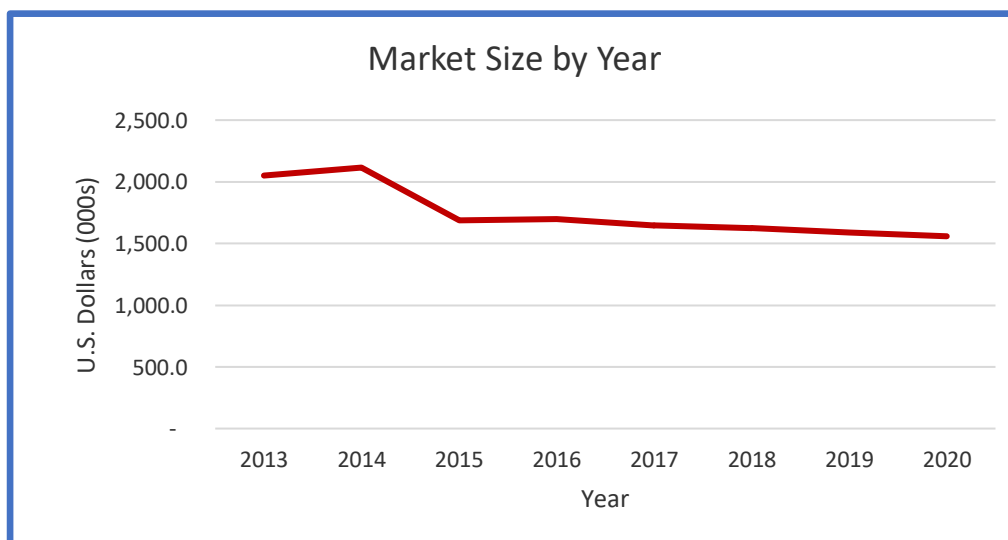
Service: Development and/or fundraising services

The market for this service in Norway is estimated to be \$1.6 million dollars in 2019 and is expected to change by -1.8 percent from 2019 to 2020. The market will be 17 million Kroner in 2019 and is forecast to change by 6.7 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Krones
2013	2,051.6	12,053.0
2014	2,115.4	13,330.3
2015	1,690.1	13,629.2
2016	1,696.3	14,249.3
2017	1,646.9	15,114.2
2018	1,624.2	15,949.5
2019	1,587.1	17,021.6
2020	1,558.6	18,099.1
2025	1,410.6	24,137.4
Y-to-Y Change	US Dollars	Krones
2013-2014	3.1%	10.6%
2014-2015	-20.1%	2.2%
2015-2016	0.4%	4.5%
2016-2017	-2.9%	6.1%
2017-2018	-1.4%	5.5%
2018-2019	-2.3%	6.7%
2019-2020	-1.8%	6.3%
CAGR 2020-2025	-1.9%	33.4%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Norway

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Norway will be \$0.73 million dollars in 2019 and the lease and rental payments for the market will be \$0.08 million dollars. The operating expenses for this market is expected to reach \$1.19 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	730.05
Operating Expenses (\$1,000)	1,193.48
Employer Costs for Fringe Benefits (\$1,000)	115.86
Contract Labor Costs including Temporary Help (\$1,000)	49.20
Cost of Insurance (\$1,000)	22.22
Taxes and License Fees (\$1,000)	11.11
Lease and Rental Payments (\$1,000)	79.35

Cost of Services Estimates

The cost of transportation for this market in Norway will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	15.87
Cost of Purchased Repair and Maintenance Services (\$1,000)	7.94
Cost of Purchased Printing Services (\$1,000)	11.11
Cost of Purchased Advertising and Promotional Services (\$1,000)	22.22
Cost of Purchased Legal Services (\$1,000)	12.70
Cost of Purchased Accounting and Auditing Services (\$1,000)	7.94

*2018-2019 Forecasts

Source: Barnes Reports

Pakistan

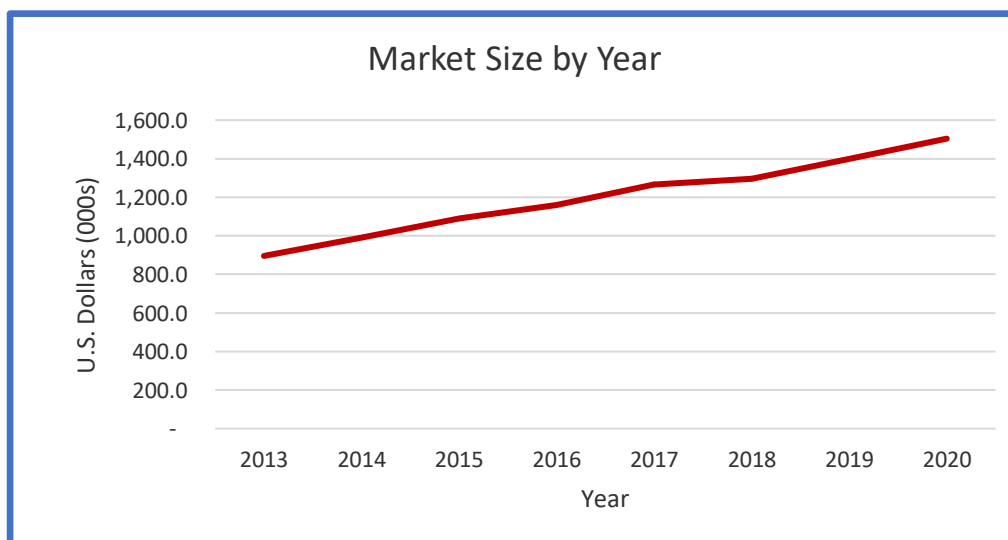
Service: Development and/or fundraising services

The market for this service in Pakistan is estimated to be \$1.4 million dollars in 2019 and is expected to change by 7.6 percent from 2019 to 2020. The market will be 173.7 million Rupees in 2019 and is forecast to change by 13.2 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Rupees
2013	895.5	86,703.2
2014	990.7	102,038.8
2015	1,091.1	110,667.4
2016	1,158.7	120,899.6
2017	1,266.0	137,145.1
2018	1,295.7	153,476.1
2019	1,398.2	173,697.1
2020	1,503.8	195,860.8
2025	2,157.3	350,327.3
Y-to-Y Change	US Dollars	Rupees
2013-2014	10.6%	17.7%
2014-2015	10.1%	8.5%
2015-2016	6.2%	9.2%
2016-2017	9.3%	13.4%
2017-2018	2.3%	11.9%
2018-2019	7.9%	13.2%
2019-2020	7.6%	12.8%
CAGR 2020-2025	8.7%	78.9%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Pakistan

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Pakistan will be \$0.64 million dollars in 2019 and the lease and rental payments for the market will be \$0.07 million dollars. The operating expenses for this market is expected to reach \$1.05 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	643.17
Operating Expenses (\$1,000)	1,051.44
Employer Costs for Fringe Benefits (\$1,000)	102.07
Contract Labor Costs including Temporary Help (\$1,000)	43.34
Cost of Insurance (\$1,000)	19.57
Taxes and License Fees (\$1,000)	9.79
Lease and Rental Payments (\$1,000)	69.91

Cost of Services Estimates

The cost of transportation for this market in Pakistan will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	13.98
Cost of Purchased Repair and Maintenance Services (\$1,000)	6.99
Cost of Purchased Printing Services (\$1,000)	9.79
Cost of Purchased Advertising and Promotional Services (\$1,000)	19.57
Cost of Purchased Legal Services (\$1,000)	11.19
Cost of Purchased Accounting and Auditing Services (\$1,000)	6.99

*2018-2019 Forecasts

Source: Barnes Reports

Philippines

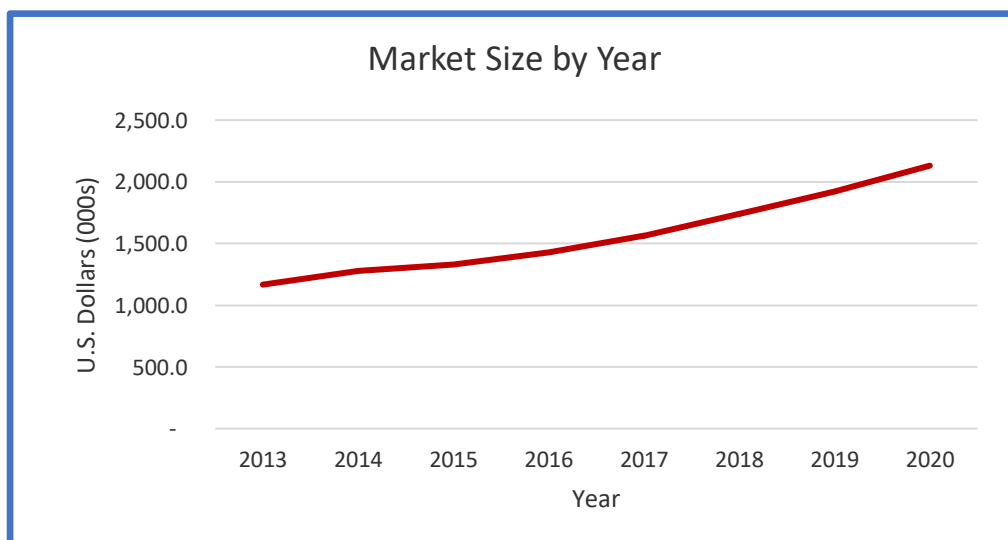
Service: Development and/or fundraising services

The market for this service in Philippines is estimated to be \$1.9 million dollars in 2019 and is expected to change by 10.9 percent from 2019 to 2020. The market will be 94 million Pesos in 2019 and is forecast to change by 12.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Pesos
2013	1,166.7	49,521.1
2014	1,279.5	56,802.7
2015	1,331.9	60,605.9
2016	1,430.5	67,937.1
2017	1,562.1	75,309.4
2018	1,740.2	83,644.1
2019	1,920.9	93,953.5
2020	2,130.9	105,146.1
2025	3,547.3	181,112.3
Y-to-Y Change	US Dollars	Pesos
2013-2014	9.7%	14.7%
2014-2015	4.1%	6.7%
2015-2016	7.4%	12.1%
2016-2017	9.2%	10.9%
2017-2018	11.4%	11.1%
2018-2019	10.4%	12.3%
2019-2020	10.9%	11.9%
CAGR 2020-2025	13.3%	72.2%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Philippines

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Philippines will be \$0.88 million dollars in 2019 and the lease and rental payments for the market will be \$0.10 million dollars. The operating expenses for this market is expected to reach \$1.44 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	883.60
Operating Expenses (\$1,000)	1,444.50
Employer Costs for Fringe Benefits (\$1,000)	140.22
Contract Labor Costs including Temporary Help (\$1,000)	59.55
Cost of Insurance (\$1,000)	26.89
Taxes and License Fees (\$1,000)	13.45
Lease and Rental Payments (\$1,000)	96.04

Cost of Services Estimates

The cost of transportation for this market in Philippines will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	19.21
Cost of Purchased Repair and Maintenance Services (\$1,000)	9.60
Cost of Purchased Printing Services (\$1,000)	13.45
Cost of Purchased Advertising and Promotional Services (\$1,000)	26.89
Cost of Purchased Legal Services (\$1,000)	15.37
Cost of Purchased Accounting and Auditing Services (\$1,000)	9.60

*2018-2019 Forecasts

Source: Barnes Reports

Poland

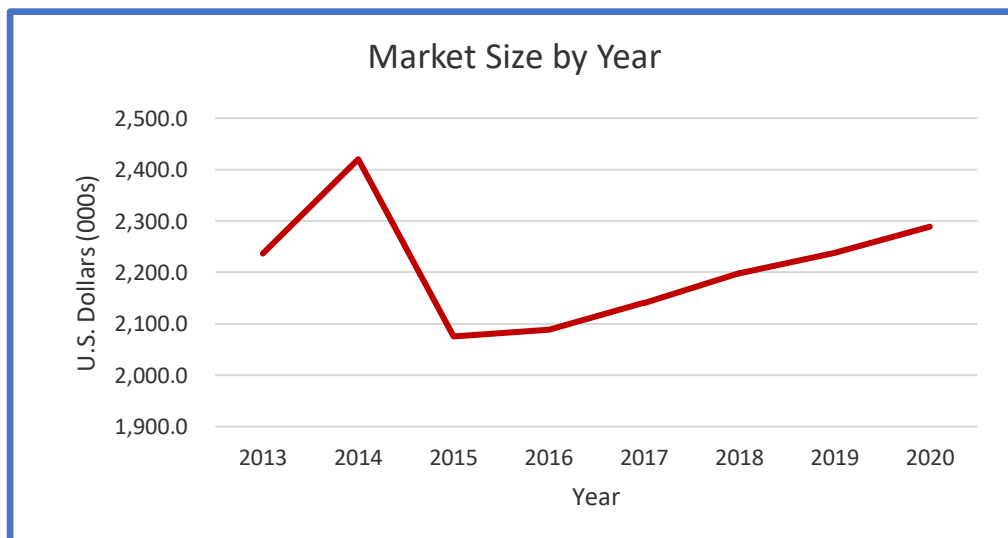
Service: Development and/or fundraising services

The market for this service in Poland is estimated to be \$2.2 million dollars in 2019 and is expected to change by 2.3 percent from 2019 to 2020. The market will be 10 million Zlotys in 2019 and is forecast to change by 7.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Zlotys
2013	2,236.0	7,067.7
2014	2,420.1	7,635.6
2015	2,075.3	7,824.3
2016	2,088.7	8,236.1
2017	2,140.1	8,784.7
2018	2,198.4	9,307.2
2019	2,237.7	9,972.4
2020	2,288.9	10,645.9
2025	2,540.4	14,483.1
Y-to-Y Change	US Dollars	Zlotys
2013-2014	8.2%	8.0%
2014-2015	-14.2%	2.5%
2015-2016	0.6%	5.3%
2016-2017	2.5%	6.7%
2017-2018	2.7%	5.9%
2018-2019	1.8%	7.1%
2019-2020	2.3%	6.8%
CAGR 2020-2025	2.2%	36.0%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Poland

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Poland will be \$1.03 million dollars in 2019 and the lease and rental payments for the market will be \$0.11 million dollars. The operating expenses for this market is expected to reach \$1.68 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,029.33
Operating Expenses (\$1,000)	1,682.72
Employer Costs for Fringe Benefits (\$1,000)	163.35
Contract Labor Costs including Temporary Help (\$1,000)	69.37
Cost of Insurance (\$1,000)	31.33
Taxes and License Fees (\$1,000)	15.66
Lease and Rental Payments (\$1,000)	111.88

Cost of Services Estimates

The cost of transportation for this market in Poland will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.02 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	22.38
Cost of Purchased Repair and Maintenance Services (\$1,000)	11.19
Cost of Purchased Printing Services (\$1,000)	15.66
Cost of Purchased Advertising and Promotional Services (\$1,000)	31.33
Cost of Purchased Legal Services (\$1,000)	17.90
Cost of Purchased Accounting and Auditing Services (\$1,000)	11.19

*2018-2019 Forecasts

Source: Barnes Reports

Portugal

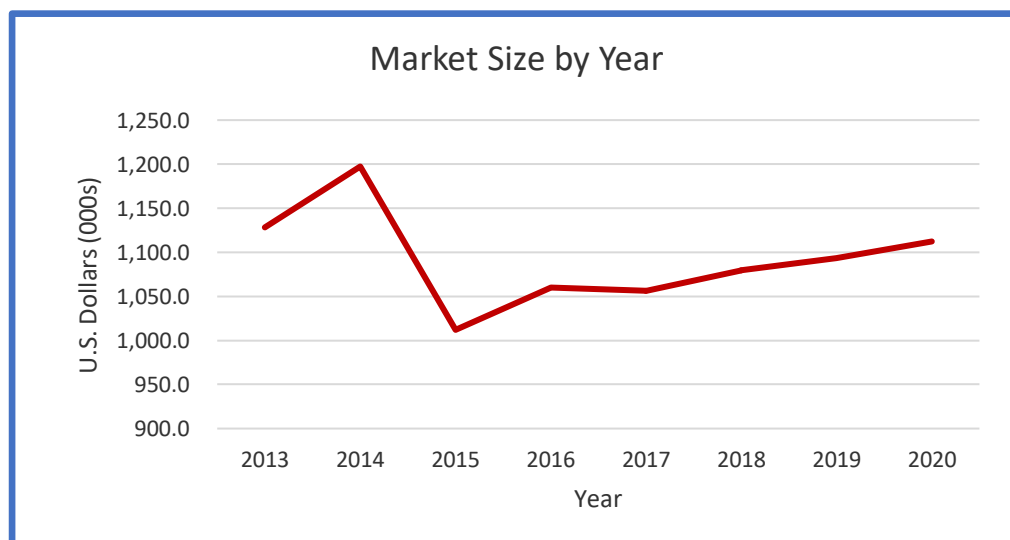
Service: Development and/or fundraising services

The market for this service in Portugal is estimated to be \$1.1 million dollars in 2019 and is expected to change by 1.8 percent from 2019 to 2020. The market will be 1.1 million Euros in 2019 and is forecast to change by 5.8 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	1,127.9	849.5
2014	1,197.3	902.5
2015	1,012.0	912.5
2016	1,059.9	958.2
2017	1,056.2	1,003.5
2018	1,079.4	1,049.7
2019	1,093.1	1,110.5
2020	1,112.5	1,170.5
2025	1,203.5	1,494.3
Y-to-Y Change	US Dollars	Euros
2013-2014	6.2%	6.2%
2014-2015	-15.5%	1.1%
2015-2016	4.7%	5.0%
2016-2017	-0.4%	4.7%
2017-2018	2.2%	4.6%
2018-2019	1.3%	5.8%
2019-2020	1.8%	5.4%
CAGR 2020-2025	1.6%	27.7%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Portugal

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Portugal will be \$0.50 million dollars in 2019 and the lease and rental payments for the market will be \$0.05 million dollars. The operating expenses for this market is expected to reach \$0.82 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	502.83
Operating Expenses (\$1,000)	822.01
Employer Costs for Fringe Benefits (\$1,000)	79.80
Contract Labor Costs including Temporary Help (\$1,000)	33.89
Cost of Insurance (\$1,000)	15.30
Taxes and License Fees (\$1,000)	7.65
Lease and Rental Payments (\$1,000)	54.66

Cost of Services Estimates

The cost of transportation for this market in Portugal will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	10.93
Cost of Purchased Repair and Maintenance Services (\$1,000)	5.47
Cost of Purchased Printing Services (\$1,000)	7.65
Cost of Purchased Advertising and Promotional Services (\$1,000)	15.30
Cost of Purchased Legal Services (\$1,000)	8.74
Cost of Purchased Accounting and Auditing Services (\$1,000)	5.47

*2018-2019 Forecasts

Source: Barnes Reports

Russia

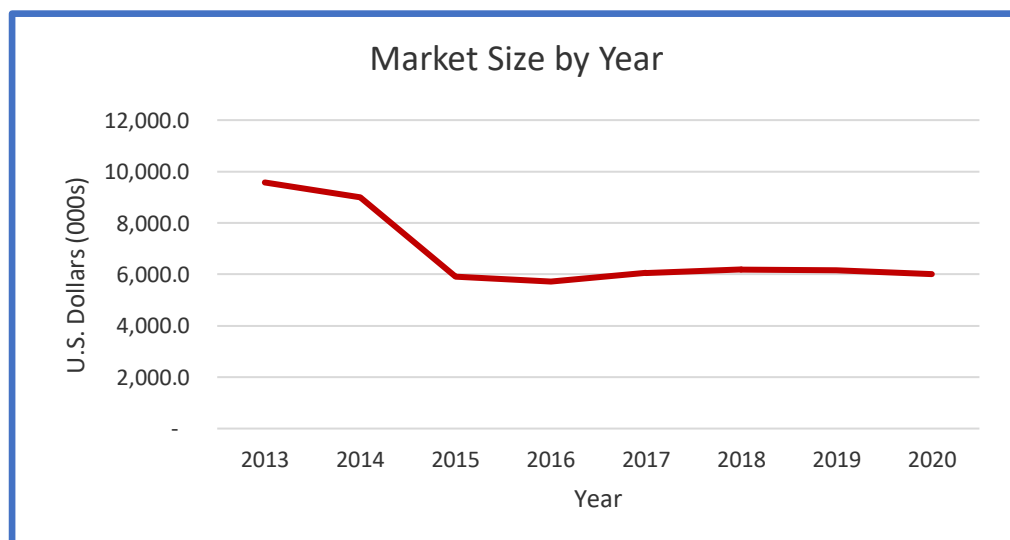
Service: Development and/or fundraising services

The market for this service in Russia is estimated to be \$6.2 million dollars in 2019 and is expected to change by -2.5 percent from 2019 to 2020. The market will be 505 million Rubles in 2019 and is forecast to change by 9.9 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Rubles
2013	9,574.0	304,809.9
2014	8,991.3	345,070.1
2015	5,907.6	359,994.4
2016	5,719.3	383,510.3
2017	6,050.3	422,927.9
2018	6,190.2	459,562.1
2019	6,152.5	505,025.6
2020	5,999.6	552,949.7
2025	4,921.9	853,687.9
Y-to-Y Change	US Dollars	Rubles
2013-2014	-6.1%	13.2%
2014-2015	-34.3%	4.3%
2015-2016	-3.2%	6.5%
2016-2017	5.8%	10.3%
2017-2018	2.3%	8.7%
2018-2019	-0.6%	9.9%
2019-2020	-2.5%	9.5%
CAGR 2020-2025	-3.6%	54.4%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Russia

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Russia will be \$2.83 million dollars in 2019 and the lease and rental payments for the market will be \$0.31 million dollars. The operating expenses for this market is expected to reach \$4.63 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	2,830.14
Operating Expenses (\$1,000)	4,626.66
Employer Costs for Fringe Benefits (\$1,000)	449.13
Contract Labor Costs including Temporary Help (\$1,000)	190.73
Cost of Insurance (\$1,000)	86.13
Taxes and License Fees (\$1,000)	43.07
Lease and Rental Payments (\$1,000)	307.62

Cost of Services Estimates

The cost of transportation for this market in Russia will be \$0.06 million dollars in 2019 and the cost of printing services for the market will be \$0.04 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.03 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	61.52
Cost of Purchased Repair and Maintenance Services (\$1,000)	30.76
Cost of Purchased Printing Services (\$1,000)	43.07
Cost of Purchased Advertising and Promotional Services (\$1,000)	86.13
Cost of Purchased Legal Services (\$1,000)	49.22
Cost of Purchased Accounting and Auditing Services (\$1,000)	30.76

*2018-2019 Forecasts

Source: Barnes Reports

Saudi Arabia

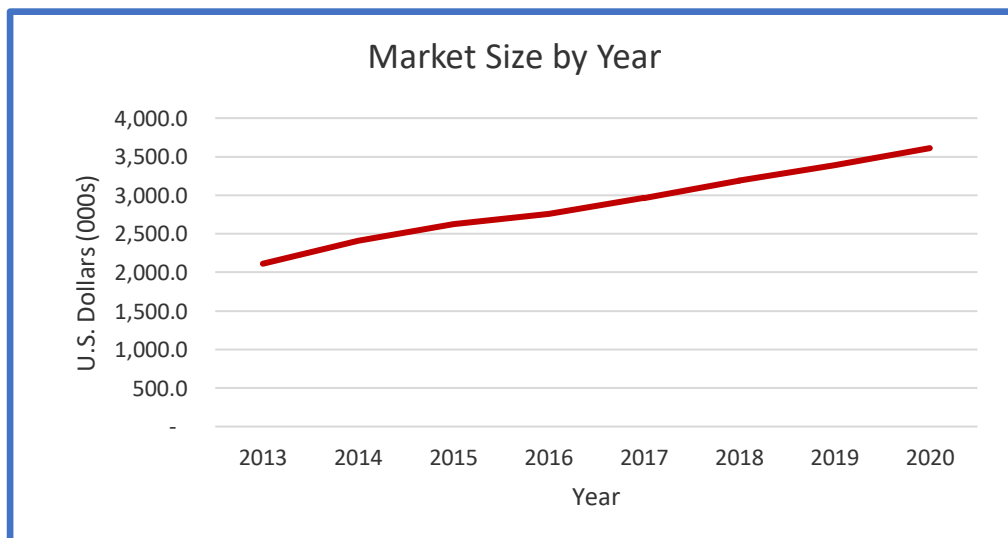
Service: Development and/or fundraising services

The market for this service in Saudi Arabia is estimated to be \$3.4 million dollars in 2019 and is expected to change by 6.5 percent from 2019 to 2020. The market will be 11.4 million Riyals in 2019 and is forecast to change by 3.4 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Riyals
2013	2,111.8	7,919.3
2014	2,407.8	9,029.3
2015	2,625.7	9,846.2
2016	2,755.9	10,334.7
2017	2,962.3	10,701.0
2018	3,188.7	10,979.4
2019	3,390.6	11,357.6
2020	3,610.6	11,665.1
2025	6,220.1	16,606.2
Y-to-Y Change	US Dollars	Riyals
2013-2014	14.0%	14.0%
2014-2015	9.0%	9.0%
2015-2016	5.0%	5.0%
2016-2017	7.5%	3.5%
2017-2018	7.6%	2.6%
2018-2019	6.3%	3.4%
2019-2020	6.5%	2.7%
CAGR 2020-2025	14.5%	42.4%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Saudi Arabia

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Saudi Arabia will be \$1.56 million dollars in 2019 and the lease and rental payments for the market will be \$0.17 million dollars. The operating expenses for this market is expected to reach \$2.55 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,559.67
Operating Expenses (\$1,000)	2,549.71
Employer Costs for Fringe Benefits (\$1,000)	247.51
Contract Labor Costs including Temporary Help (\$1,000)	105.11
Cost of Insurance (\$1,000)	47.47
Taxes and License Fees (\$1,000)	23.73
Lease and Rental Payments (\$1,000)	169.53

Cost of Services Estimates

The cost of transportation for this market in Saudi Arabia will be \$0.03 million dollars in 2019 and the cost of printing services for the market will be \$0.02 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.02 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	33.91
Cost of Purchased Repair and Maintenance Services (\$1,000)	16.95
Cost of Purchased Printing Services (\$1,000)	23.73
Cost of Purchased Advertising and Promotional Services (\$1,000)	47.47
Cost of Purchased Legal Services (\$1,000)	27.12
Cost of Purchased Accounting and Auditing Services (\$1,000)	16.95

*2018-2019 Forecasts

Source: Barnes Reports

Singapore

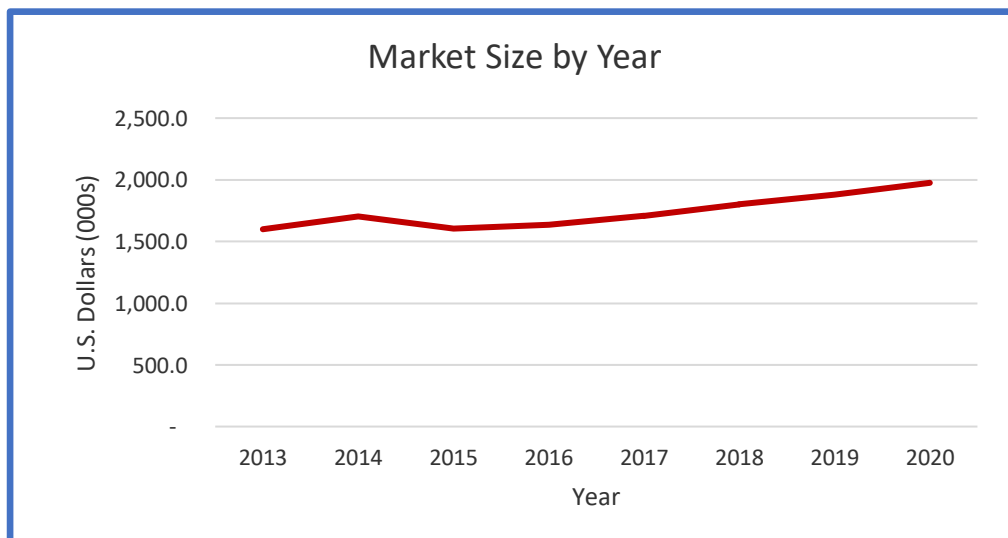
Service: Development and/or fundraising services

The market for this service in Singapore is estimated to be \$1.9 million dollars in 2019 and is expected to change by 5 percent from 2019 to 2020. The market will be 2.7 million Dollars in 2019 and is forecast to change by 6.2 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Dollars
2013	1,599.3	2,001.3
2014	1,701.9	2,156.5
2015	1,604.6	2,206.0
2016	1,637.6	2,262.4
2017	1,707.3	2,409.6
2018	1,800.4	2,530.3
2019	1,881.2	2,687.1
2020	1,975.5	2,843.1
2025	2,499.7	3,699.3
Y-to-Y Change	US Dollars	Dollars
2013-2014	6.4%	7.8%
2014-2015	-5.7%	2.3%
2015-2016	2.1%	2.6%
2016-2017	4.3%	6.5%
2017-2018	5.5%	5.0%
2018-2019	4.5%	6.2%
2019-2020	5.0%	5.8%
CAGR 2020-2025	5.3%	30.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Singapore

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Singapore will be \$0.87 million dollars in 2019 and the lease and rental payments for the market will be \$0.09 million dollars. The operating expenses for this market is expected to reach \$1.41 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	865.36
Operating Expenses (\$1,000)	1,414.68
Employer Costs for Fringe Benefits (\$1,000)	137.33
Contract Labor Costs including Temporary Help (\$1,000)	58.32
Cost of Insurance (\$1,000)	26.34
Taxes and License Fees (\$1,000)	13.17
Lease and Rental Payments (\$1,000)	94.06

Cost of Services Estimates

The cost of transportation for this market in Singapore will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	18.81
Cost of Purchased Repair and Maintenance Services (\$1,000)	9.41
Cost of Purchased Printing Services (\$1,000)	13.17
Cost of Purchased Advertising and Promotional Services (\$1,000)	26.34
Cost of Purchased Legal Services (\$1,000)	15.05
Cost of Purchased Accounting and Auditing Services (\$1,000)	9.41

*2018-2019 Forecasts

Source: Barnes Reports

South Africa

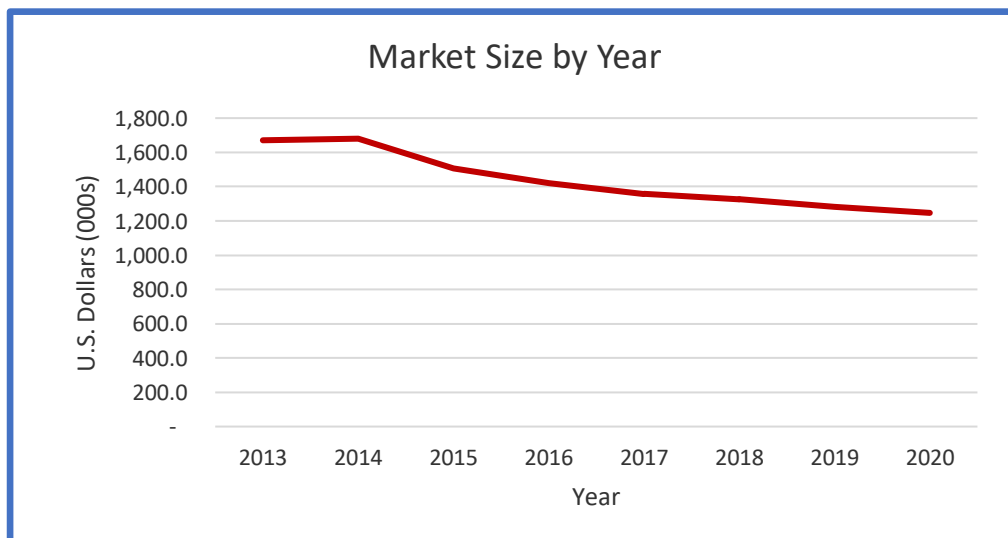
Service: Development and/or fundraising services

The market for this service in South Africa is estimated to be \$1.3 million dollars in 2019 and is expected to change by -2.8 percent from 2019 to 2020. The market will be 27.6 million Rands in 2019 and is forecast to change by 10.4 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Rands
2013	1,670.9	16,124.3
2014	1,680.1	18,219.6
2015	1,506.9	19,214.2
2016	1,419.2	20,875.2
2017	1,358.4	22,879.8
2018	1,326.1	24,969.9
2019	1,282.7	27,559.7
2020	1,247.0	30,306.3
2025	1,072.8	47,817.1
Y-to-Y Change	US Dollars	Rands
2013-2014	0.6%	13.0%
2014-2015	-10.3%	5.5%
2015-2016	-5.8%	8.6%
2016-2017	-4.3%	9.6%
2017-2018	-2.4%	9.1%
2018-2019	-3.3%	10.4%
2019-2020	-2.8%	10.0%
CAGR 2020-2025	-2.8%	57.8%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



South Africa

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in South Africa will be \$0.59 million dollars in 2019 and the lease and rental payments for the market will be \$0.06 million dollars. The operating expenses for this market is expected to reach \$0.96 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	590.06
Operating Expenses (\$1,000)	964.62
Employer Costs for Fringe Benefits (\$1,000)	93.64
Contract Labor Costs including Temporary Help (\$1,000)	39.76
Cost of Insurance (\$1,000)	17.96
Taxes and License Fees (\$1,000)	8.98
Lease and Rental Payments (\$1,000)	64.14

Cost of Services Estimates

The cost of transportation for this market in South Africa will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	12.83
Cost of Purchased Repair and Maintenance Services (\$1,000)	6.41
Cost of Purchased Printing Services (\$1,000)	8.98
Cost of Purchased Advertising and Promotional Services (\$1,000)	17.96
Cost of Purchased Legal Services (\$1,000)	10.26
Cost of Purchased Accounting and Auditing Services (\$1,000)	6.41

*2018-2019 Forecasts

Source: Barnes Reports

Spain

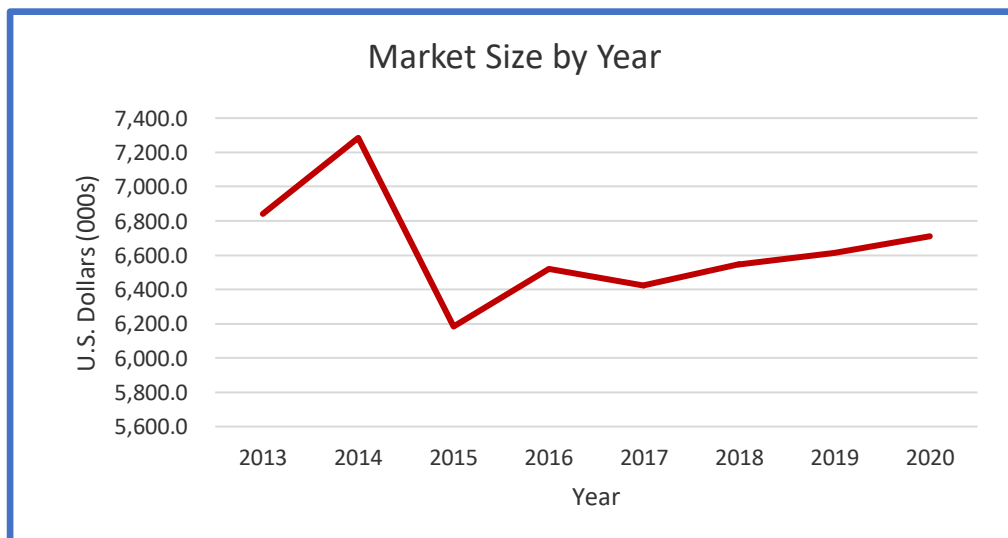
Service: Development and/or fundraising services

The market for this service in Spain is estimated to be \$6.6 million dollars in 2019 and is expected to change by 1.5 percent from 2019 to 2020. The market will be 6.9 million Euros in 2019 and is forecast to change by 6.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Euros
2013	6,842.1	5,153.2
2014	7,284.9	5,490.9
2015	6,183.8	5,575.7
2016	6,518.6	5,893.0
2017	6,424.5	6,171.5
2018	6,547.7	6,473.6
2019	6,612.3	6,867.3
2020	6,710.7	7,258.3
2025	7,160.1	9,393.2
Y-to-Y Change	US Dollars	Euros
2013-2014	6.5%	6.6%
2014-2015	-15.1%	1.5%
2015-2016	5.4%	5.7%
2016-2017	-1.4%	4.7%
2017-2018	1.9%	4.9%
2018-2019	1.0%	6.1%
2019-2020	1.5%	5.7%
CAGR 2020-2025	1.3%	29.4%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Spain

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Spain will be \$3.04 million dollars in 2019 and the lease and rental payments for the market will be \$0.33 million dollars. The operating expenses for this market is expected to reach \$4.97 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	3,041.65
Operating Expenses (\$1,000)	4,972.43
Employer Costs for Fringe Benefits (\$1,000)	482.70
Contract Labor Costs including Temporary Help (\$1,000)	204.98
Cost of Insurance (\$1,000)	92.57
Taxes and License Fees (\$1,000)	46.29
Lease and Rental Payments (\$1,000)	330.61

Cost of Services Estimates

The cost of transportation for this market in Spain will be \$0.07 million dollars in 2019 and the cost of printing services for the market will be \$0.05 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.03 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	66.12
Cost of Purchased Repair and Maintenance Services (\$1,000)	33.06
Cost of Purchased Printing Services (\$1,000)	46.29
Cost of Purchased Advertising and Promotional Services (\$1,000)	92.57
Cost of Purchased Legal Services (\$1,000)	52.90
Cost of Purchased Accounting and Auditing Services (\$1,000)	33.06

*2018-2019 Forecasts

Source: Barnes Reports

Sweden

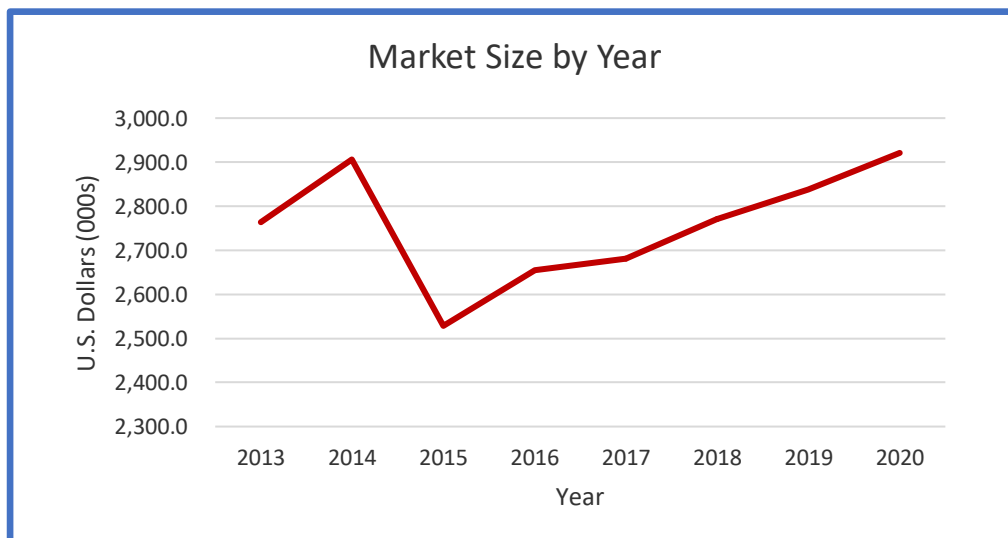
Service: Development and/or fundraising services

The market for this service in Sweden is estimated to be \$2.8 million dollars in 2019 and is expected to change by 2.9 percent from 2019 to 2020. The market will be 29.8 million Kronas in 2019 and is forecast to change by 9.9 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Kronas
2013	2,764.1	18,005.5
2014	2,905.9	19,936.5
2015	2,528.5	21,327.6
2016	2,655.2	22,734.0
2017	2,681.1	24,924.4
2018	2,771.1	27,080.8
2019	2,838.0	29,757.1
2020	2,921.0	32,577.8
2025	3,343.3	50,272.8
Y-to-Y Change	US Dollars	Kronas
2013-2014	5.1%	10.7%
2014-2015	-13.0%	7.0%
2015-2016	5.0%	6.6%
2016-2017	1.0%	9.6%
2017-2018	3.4%	8.7%
2018-2019	2.4%	9.9%
2019-2020	2.9%	9.5%
CAGR 2020-2025	2.9%	54.3%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Sweden

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Sweden will be \$1.31 million dollars in 2019 and the lease and rental payments for the market will be \$0.14 million dollars. The operating expenses for this market is expected to reach \$2.13 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,305.49
Operating Expenses (\$1,000)	2,134.19
Employer Costs for Fringe Benefits (\$1,000)	207.18
Contract Labor Costs including Temporary Help (\$1,000)	87.98
Cost of Insurance (\$1,000)	39.73
Taxes and License Fees (\$1,000)	19.87
Lease and Rental Payments (\$1,000)	141.90

Cost of Services Estimates

The cost of transportation for this market in Sweden will be \$0.03 million dollars in 2019 and the cost of printing services for the market will be \$0.02 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	28.38
Cost of Purchased Repair and Maintenance Services (\$1,000)	14.19
Cost of Purchased Printing Services (\$1,000)	19.87
Cost of Purchased Advertising and Promotional Services (\$1,000)	39.73
Cost of Purchased Legal Services (\$1,000)	22.70
Cost of Purchased Accounting and Auditing Services (\$1,000)	14.19

*2018-2019 Forecasts

Source: Barnes Reports

Switzerland

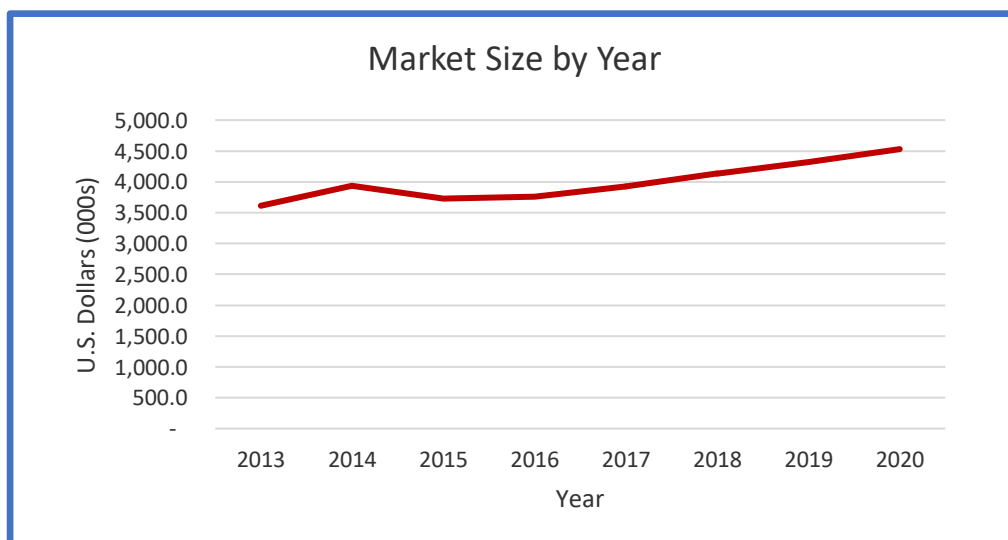
Service: Development and/or fundraising services

The market for this service in Switzerland is estimated to be \$4.3 million dollars in 2019 and is expected to change by 4.9 percent from 2019 to 2020. The market will be 4.2 million Francs in 2019 and is forecast to change by 4.6 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Francs
2013	3,611.9	3,347.9
2014	3,938.4	3,608.2
2015	3,732.6	3,592.2
2016	3,754.2	3,698.8
2017	3,925.5	3,847.4
2018	4,135.8	3,981.1
2019	4,317.6	4,166.1
2020	4,529.8	4,343.7
2025	5,706.0	5,251.2
Y-to-Y Change	US Dollars	Francs
2013-2014	9.0%	7.8%
2014-2015	-5.2%	-0.4%
2015-2016	0.6%	3.0%
2016-2017	4.6%	4.0%
2017-2018	5.4%	3.5%
2018-2019	4.4%	4.6%
2019-2020	4.9%	4.3%
CAGR 2020-2025	5.2%	20.9%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Switzerland

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Switzerland will be \$1.99 million dollars in 2019 and the lease and rental payments for the market will be \$0.22 million dollars. The operating expenses for this market is expected to reach \$3.25 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,986.09
Operating Expenses (\$1,000)	3,246.83
Employer Costs for Fringe Benefits (\$1,000)	315.18
Contract Labor Costs including Temporary Help (\$1,000)	133.85
Cost of Insurance (\$1,000)	60.45
Taxes and License Fees (\$1,000)	30.22
Lease and Rental Payments (\$1,000)	215.88

Cost of Services Estimates

The cost of transportation for this market in Switzerland will be \$0.04 million dollars in 2019 and the cost of printing services for the market will be \$0.03 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.02 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	43.18
Cost of Purchased Repair and Maintenance Services (\$1,000)	21.59
Cost of Purchased Printing Services (\$1,000)	30.22
Cost of Purchased Advertising and Promotional Services (\$1,000)	60.45
Cost of Purchased Legal Services (\$1,000)	34.54
Cost of Purchased Accounting and Auditing Services (\$1,000)	21.59

*2018-2019 Forecasts

Source: Barnes Reports

Thailand

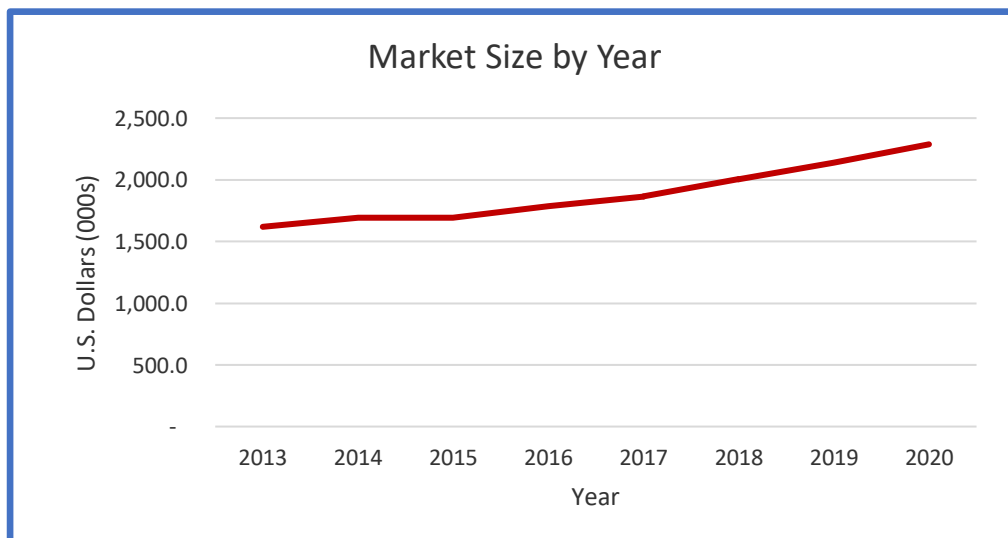
Service: Development and/or fundraising services

The market for this service in Thailand is estimated to be \$2.1 million dollars in 2019 and is expected to change by 7.1 percent from 2019 to 2020. The market will be 80.5 million Bahts in 2019 and is forecast to change by 9.4 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Bahts
2013	1,619.0	49,744.1
2014	1,691.8	54,950.1
2015	1,691.0	57,913.7
2016	1,785.2	63,012.1
2017	1,865.9	67,988.9
2018	2,006.0	73,562.8
2019	2,136.9	80,495.1
2020	2,287.6	87,757.4
2025	3,187.6	132,619.4
Y-to-Y Change	US Dollars	Bahts
2013-2014	4.5%	10.5%
2014-2015	0.0%	5.4%
2015-2016	5.6%	8.8%
2016-2017	4.5%	7.9%
2017-2018	7.5%	8.2%
2018-2019	6.5%	9.4%
2019-2020	7.1%	9.0%
CAGR 2020-2025	7.9%	51.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Thailand

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Thailand will be \$0.98 million dollars in 2019 and the lease and rental payments for the market will be \$0.11 million dollars. The operating expenses for this market is expected to reach \$1.61 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	982.96
Operating Expenses (\$1,000)	1,606.92
Employer Costs for Fringe Benefits (\$1,000)	155.99
Contract Labor Costs including Temporary Help (\$1,000)	66.24
Cost of Insurance (\$1,000)	29.92
Taxes and License Fees (\$1,000)	14.96
Lease and Rental Payments (\$1,000)	106.84

Cost of Services Estimates

The cost of transportation for this market in Thailand will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	21.37
Cost of Purchased Repair and Maintenance Services (\$1,000)	10.68
Cost of Purchased Printing Services (\$1,000)	14.96
Cost of Purchased Advertising and Promotional Services (\$1,000)	29.92
Cost of Purchased Legal Services (\$1,000)	17.09
Cost of Purchased Accounting and Auditing Services (\$1,000)	10.68

*2018-2019 Forecasts

Source: Barnes Reports

Turkey

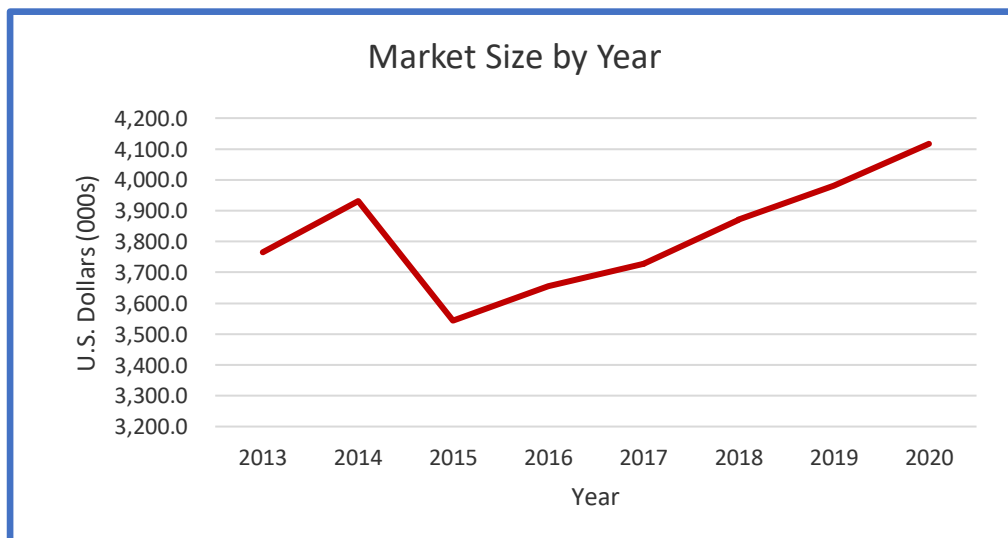
Service: Development and/or fundraising services

The market for this service in Turkey is estimated to be \$4.0 million dollars in 2019 and is expected to change by 3.4 percent from 2019 to 2020. The market will be 15.7 million Liras in 2019 and is forecast to change by 14.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Liras
2013	3,764.6	7,167.0
2014	3,930.6	8,602.4
2015	3,543.5	9,638.4
2016	3,655.4	11,039.9
2017	3,727.4	12,165.6
2018	3,870.2	13,750.3
2019	3,981.6	15,710.1
2020	4,116.7	18,276.5
2025	4,820.0	38,213.1
Y-to-Y Change	US Dollars	Liras
2013-2014	4.4%	20.0%
2014-2015	-9.8%	12.0%
2015-2016	3.2%	14.5%
2016-2017	2.0%	10.2%
2017-2018	3.8%	13.0%
2018-2019	2.9%	14.3%
2019-2020	3.4%	16.3%
CAGR 2020-2025	3.4%	109.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Turkey

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Turkey will be \$1.83 million dollars in 2019 and the lease and rental payments for the market will be \$0.20 million dollars. The operating expenses for this market is expected to reach \$2.99 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	1,831.55
Operating Expenses (\$1,000)	2,994.18
Employer Costs for Fringe Benefits (\$1,000)	290.66
Contract Labor Costs including Temporary Help (\$1,000)	123.43
Cost of Insurance (\$1,000)	55.74
Taxes and License Fees (\$1,000)	27.87
Lease and Rental Payments (\$1,000)	199.08

Cost of Services Estimates

The cost of transportation for this market in Turkey will be \$0.04 million dollars in 2019 and the cost of printing services for the market will be \$0.03 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.02 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	39.82
Cost of Purchased Repair and Maintenance Services (\$1,000)	19.91
Cost of Purchased Printing Services (\$1,000)	27.87
Cost of Purchased Advertising and Promotional Services (\$1,000)	55.74
Cost of Purchased Legal Services (\$1,000)	31.85
Cost of Purchased Accounting and Auditing Services (\$1,000)	19.91

*2018-2019 Forecasts

Source: Barnes Reports

United Arab Emirates

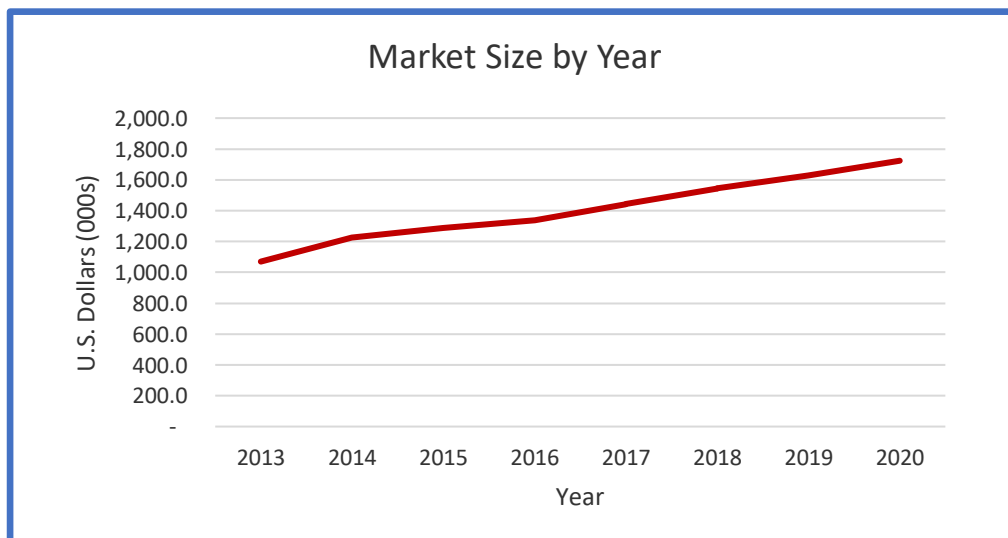
Service: Development and/or fundraising services

The market for this service in United Arab Emirates is estimated to be \$1.6 million dollars in 2019 and is expected to change by 5.8 percent from 2019 to 2020. The market will be 5.3 million Dirhams in 2019 and is forecast to change by 2.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Dirhams
2013	1,069.7	3,928.6
2014	1,226.9	4,505.8
2015	1,286.9	4,726.0
2016	1,339.5	4,919.2
2017	1,443.4	5,064.7
2018	1,543.2	5,140.2
2019	1,629.7	5,259.7
2020	1,723.7	5,343.6
2025	2,870.3	7,204.1
Y-to-Y Change	US Dollars	Dirhams
2013-2014	14.7%	14.7%
2014-2015	4.9%	4.9%
2015-2016	4.1%	4.1%
2016-2017	7.8%	3.0%
2017-2018	6.9%	1.5%
2018-2019	5.6%	2.3%
2019-2020	5.8%	1.6%
CAGR 2020-2025	13.3%	34.8%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



United Arab Emirates

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in United Arab Emirates will be \$0.75 million dollars in 2019 and the lease and rental payments for the market will be \$0.08 million dollars. The operating expenses for this market is expected to reach \$1.23 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	749.68
Operating Expenses (\$1,000)	1,225.56
Employer Costs for Fringe Benefits (\$1,000)	118.97
Contract Labor Costs including Temporary Help (\$1,000)	50.52
Cost of Insurance (\$1,000)	22.82
Taxes and License Fees (\$1,000)	11.41
Lease and Rental Payments (\$1,000)	81.49

Cost of Services Estimates

The cost of transportation for this market in United Arab Emirates will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	16.30
Cost of Purchased Repair and Maintenance Services (\$1,000)	8.15
Cost of Purchased Printing Services (\$1,000)	11.41
Cost of Purchased Advertising and Promotional Services (\$1,000)	22.82
Cost of Purchased Legal Services (\$1,000)	13.04
Cost of Purchased Accounting and Auditing Services (\$1,000)	8.15

*2018-2019 Forecasts

Source: Barnes Reports

United Kingdom

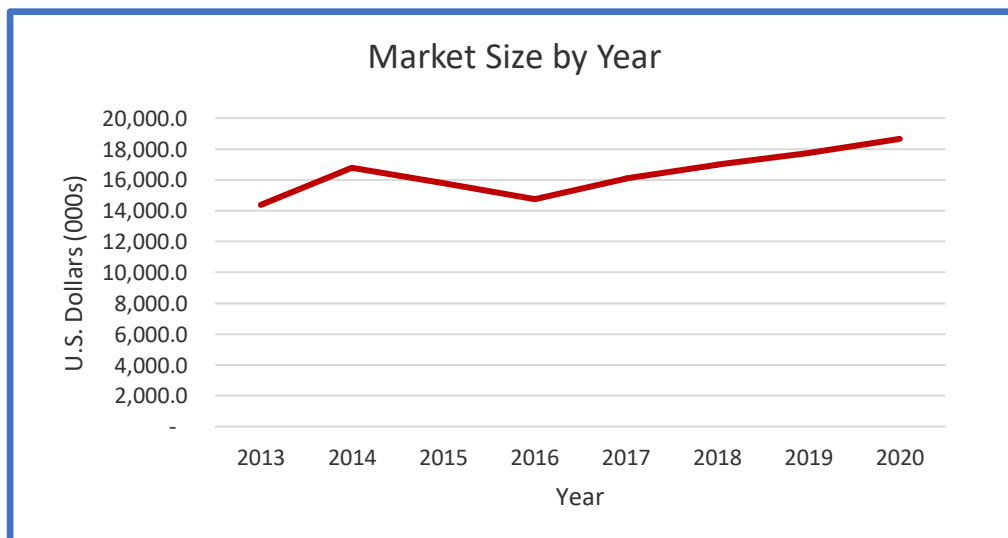
Service: Development and/or fundraising services

The market for this service in United Kingdom is estimated to be \$17.8 million dollars in 2019 and is expected to change by 5.1 percent from 2019 to 2020. The market will be 13.1 million Pounds in 2019 and is forecast to change by 7.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Pounds
2013	14,375.9	9,195.7
2014	16,766.6	10,189.6
2015	15,787.7	10,333.8
2016	14,733.3	10,912.0
2017	16,087.6	11,603.5
2018	16,976.6	12,283.0
2019	17,751.1	13,149.6
2020	18,653.3	14,025.7
2025	23,684.5	18,998.9
Y-to-Y Change	US Dollars	Pounds
2013-2014	16.6%	10.8%
2014-2015	-5.8%	1.4%
2015-2016	-6.7%	5.6%
2016-2017	9.2%	6.3%
2017-2018	5.5%	5.9%
2018-2019	4.6%	7.1%
2019-2020	5.1%	6.7%
CAGR 2020-2025	5.4%	35.5%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



United Kingdom

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in United Kingdom will be \$8.17 million dollars in 2019 and the lease and rental payments for the market will be \$0.89 million dollars. The operating expenses for this market is expected to reach \$13.35 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	8,165.51
Operating Expenses (\$1,000)	13,348.83
Employer Costs for Fringe Benefits (\$1,000)	1,295.83
Contract Labor Costs including Temporary Help (\$1,000)	550.28
Cost of Insurance (\$1,000)	248.52
Taxes and License Fees (\$1,000)	124.26
Lease and Rental Payments (\$1,000)	887.56

Cost of Services Estimates

The cost of transportation for this market in United Kingdom will be \$0.18 million dollars in 2019 and the cost of printing services for the market will be \$0.12 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.09 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	177.51
Cost of Purchased Repair and Maintenance Services (\$1,000)	88.76
Cost of Purchased Printing Services (\$1,000)	124.26
Cost of Purchased Advertising and Promotional Services (\$1,000)	248.52
Cost of Purchased Legal Services (\$1,000)	142.01
Cost of Purchased Accounting and Auditing Services (\$1,000)	88.76

*2018-2019 Forecasts

Source: Barnes Reports

United States

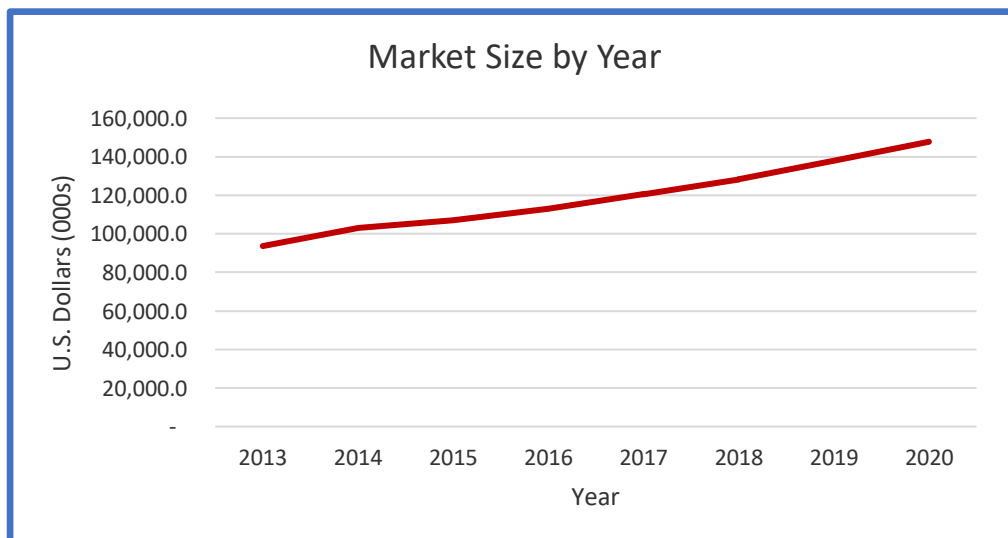
Service: Development and/or fundraising services

The market for this service in United States is estimated to be \$137.8 million dollars in 2019 and is expected to change by 7.2 percent from 2019 to 2020. The market will be 15.7 million Dollars in 2019 and is forecast to change by 14.3 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Dollars
2013	93,631.4	7,167.0
2014	102,979.4	8,602.4
2015	106,948.3	9,638.4
2016	112,922.5	11,039.9
2017	120,470.0	12,165.6
2018	128,137.7	13,750.3
2019	137,837.1	15,710.1
2020	147,726.5	18,276.5
2025	204,961.3	38,213.1
Y-to-Y Change	US Dollars	Dollars
2013-2014	10.0%	20.0%
2014-2015	3.9%	12.0%
2015-2016	5.6%	14.5%
2016-2017	6.7%	10.2%
2017-2018	6.4%	13.0%
2018-2019	7.6%	14.3%
2019-2020	7.2%	16.3%
CAGR 2020-2025	7.7%	109.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



United States

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in United States will be \$63.41 million dollars in 2019 and the lease and rental payments for the market will be \$6.89 million dollars. The operating expenses for this market is expected to reach \$103.65 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	63,405.07
Operating Expenses (\$1,000)	103,653.50
Employer Costs for Fringe Benefits (\$1,000)	10,062.11
Contract Labor Costs including Temporary Help (\$1,000)	4,272.95
Cost of Insurance (\$1,000)	1,929.72
Taxes and License Fees (\$1,000)	964.86
Lease and Rental Payments (\$1,000)	6,891.86

Cost of Services Estimates

The cost of transportation for this market in United States will be \$1.38 million dollars in 2019 and the cost of printing services for the market will be \$0.96 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.69 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	1,378.37
Cost of Purchased Repair and Maintenance Services (\$1,000)	689.19
Cost of Purchased Printing Services (\$1,000)	964.86
Cost of Purchased Advertising and Promotional Services (\$1,000)	1,929.72
Cost of Purchased Legal Services (\$1,000)	1,102.70
Cost of Purchased Accounting and Auditing Services (\$1,000)	689.19

*2018-2019 Forecasts

Source: Barnes Reports

Venezuela

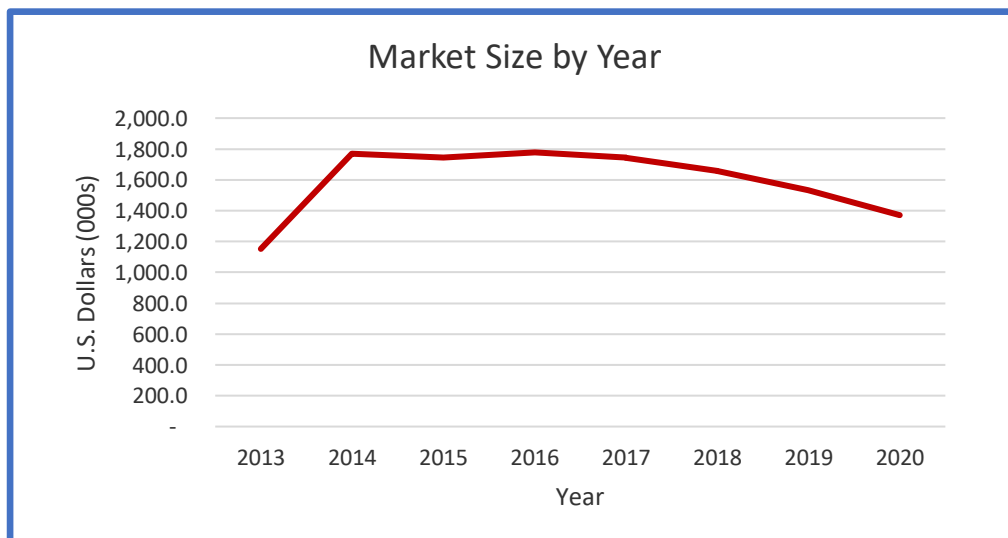
Service: Development and/or fundraising services

The market for this service in Venezuela is estimated to be \$1.5 million dollars in 2019 and is expected to change by -10.4 percent from 2019 to 2020. The market will be 14.8 million Bolivars in 2019 and is forecast to change by 8.1 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Bolivars
2013	1,152.1	6,974.2
2014	1,771.0	11,129.1
2015	1,746.0	10,972.5
2016	1,777.8	11,172.3
2017	1,742.6	12,730.8
2018	1,657.7	13,661.0
2019	1,531.3	14,772.5
2020	1,371.7	16,209.4
2025	1,533.4	32,113.9
Y-to-Y Change	US Dollars	Bolivars
2013-2014	53.7%	59.6%
2014-2015	-1.4%	-1.4%
2015-2016	1.8%	1.8%
2016-2017	-2.0%	13.9%
2017-2018	-4.9%	7.3%
2018-2019	-7.6%	8.1%
2019-2020	-10.4%	9.7%
CAGR 2020-2025	2.4%	98.1%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Venezuela

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Venezuela will be \$0.70 million dollars in 2019 and the lease and rental payments for the market will be \$0.08 million dollars. The operating expenses for this market is expected to reach \$1.15 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	704.40
Operating Expenses (\$1,000)	1,151.53
Employer Costs for Fringe Benefits (\$1,000)	111.78
Contract Labor Costs including Temporary Help (\$1,000)	47.47
Cost of Insurance (\$1,000)	21.44
Taxes and License Fees (\$1,000)	10.72
Lease and Rental Payments (\$1,000)	76.56

Cost of Services Estimates

The cost of transportation for this market in Venezuela will be \$0.02 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.01 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	15.31
Cost of Purchased Repair and Maintenance Services (\$1,000)	7.66
Cost of Purchased Printing Services (\$1,000)	10.72
Cost of Purchased Advertising and Promotional Services (\$1,000)	21.44
Cost of Purchased Legal Services (\$1,000)	12.25
Cost of Purchased Accounting and Auditing Services (\$1,000)	7.66

*2018-2019 Forecasts

Source: Barnes Reports

Vietnam

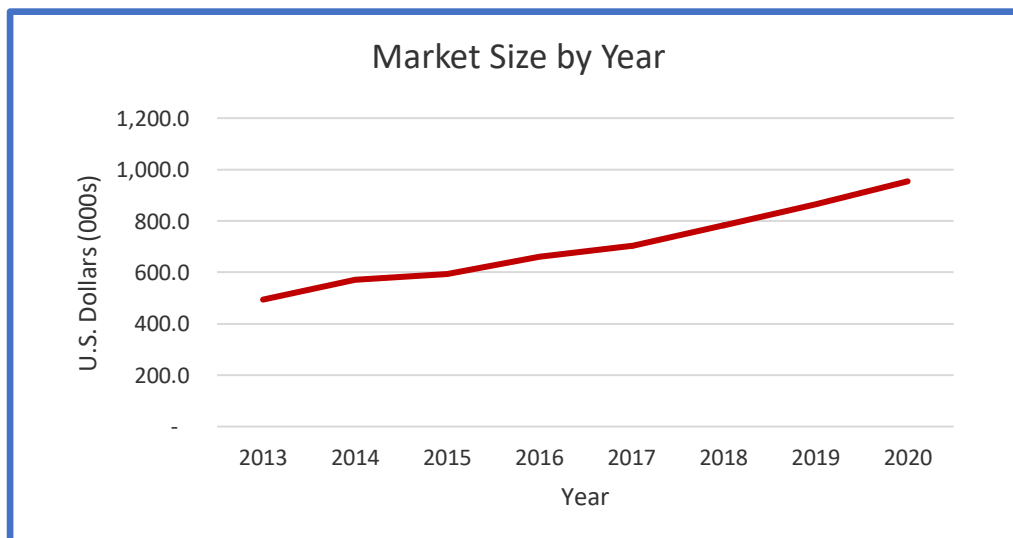
Service: Development and/or fundraising services

The market for this service in Vietnam is estimated to be \$0.9 million dollars in 2019 and is expected to change by 10.2 percent from 2019 to 2020. The market will be 20883.2 million Dongs in 2019 and is forecast to change by 13.6 percent from 2019 to 2020.

Market Sales (000s)		
Year	US Dollars	Dongs
2013	493.9	10,339,497.0
2014	570.0	12,054,004.3
2015	593.6	12,879,858.7
2016	661.3	14,505,942.6
2017	702.2	16,366,281.4
2018	782.9	18,383,480.9
2019	865.7	20,883,186.7
2020	954.1	23,635,719.8
2025	1,546.2	43,070,655.1
Y-to-Y Change	US Dollars	Dongs
2013-2014	15.4%	16.6%
2014-2015	4.1%	6.9%
2015-2016	11.4%	12.6%
2016-2017	6.2%	12.8%
2017-2018	11.5%	12.3%
2018-2019	10.6%	13.6%
2019-2020	10.2%	13.2%
CAGR 2020-2025	12.4%	82.2%

Source: Barnes Reports

*2018-2019 Forecasts; 2020-2025 Projections



Vietnam

Service: Development and/or fundraising services

Operating Costs Estimates

The annual payroll for this market in Vietnam will be \$0.40 million dollars in 2019 and the lease and rental payments for the market will be \$0.04 million dollars. The operating expenses for this market is expected to reach \$0.65 million dollars in 2019.

2019 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	398.21
Operating Expenses (\$1,000)	650.99
Employer Costs for Fringe Benefits (\$1,000)	63.19
Contract Labor Costs including Temporary Help (\$1,000)	26.84
Cost of Insurance (\$1,000)	12.12
Taxes and License Fees (\$1,000)	6.06
Lease and Rental Payments (\$1,000)	43.28

Cost of Services Estimates

The cost of transportation for this market in Vietnam will be \$0.01 million dollars in 2019 and the cost of printing services for the market will be \$0.01 million dollars. The cost of repair and maintenance for this market is expected to reach \$0.00 million dollars in 2019.

2019 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation and Warehousing (\$1,000)	8.66
Cost of Purchased Repair and Maintenance Services (\$1,000)	4.33
Cost of Purchased Printing Services (\$1,000)	6.06
Cost of Purchased Advertising and Promotional Services (\$1,000)	12.12
Cost of Purchased Legal Services (\$1,000)	6.93
Cost of Purchased Accounting and Auditing Services (\$1,000)	4.33

*2018-2019 Forecasts

Source: Barnes Reports

Appendix

Service: Development and/or fundraising services

Number of Establishments

General Definition

An establishment is a single physical location at which business is conducted and/or services are provided. It is not necessarily identical with a company or enterprise, which may consist of one establishment or more. Economic census figures represent a summary of reports for individual establishments rather than companies. For cases where a census report was received, separate information was obtained for each location where business was conducted. When administrative records of other Federal agencies were used instead of a census report, no information was available on the number of locations operated. Each economic census establishment was tabulated according to the physical location at which the business was conducted.

When two activities or more were carried on at a single location under a single ownership, all activities generally were grouped together as a single establishment. The entire establishment was classified on the basis of its major activity and all data for it were included in that classification. However, when distinct and separate economic activities (for which different industry classification codes were appropriate) were conducted at a single location under a single ownership, separate establishment reports for each of the different activities were obtained in the census.

Sector-Specific Information

Construction sector. Establishments are defined as a relatively permanent office or other place of business where the usual business activities related to construction are conducted. Establishments do not represent each project or construction site. Includes all establishments that were in business at any time during the year. It covers all full-year and part-year operations. Construction establishments which were inactive or idle for the entire year were not included. Establishments are based on a survey which included all large employers and a sample of the smaller ones.

Information; Professional, Scientific, and Technical Services; Administrative and Support and Waste Management and Remediation Services; Educational Services; Health Care and Social Assistance; Arts, Entertainment, and Recreation; and Other Services (Except Public Administration) sectors. An establishment is included in the census if it is an employer, the establishment has \$1,000 in payroll, and was in operation at any time during 1997. Leased service departments (separately owned businesses operated as departments or concessions of other service establishments or of retail businesses, such as a separately owned shoeshine parlor in a barber shop, or a beauty shop in a department store) are treated as separate service establishments for census purposes. Leased retail departments located in service establishments (e.g., a gift shop located in a hotel) are considered separate retail establishments.

Manufacturing sector. Includes all manufacturing establishments (plants) with one employee or more and establishments in operation at any time during the year.

Mining sector. Includes all mineral establishments with one employee or more and establishments in operation at any time during the year. Establishments in the crude petroleum and natural gas and support activities for mining represent statewide operations rather than those at a single physical location.

Real Estate and Rental and Leasing sector. Data for individual properties leased or managed by property lessors or property managers are not normally considered separate establishments, but rather the permanent offices from which the properties are leased or managed are considered establishments. Data for separate automotive rental offices or concessions (e.g., airport locations) in the same metropolitan area for which a common fleet of cars is maintained are merged together and not considered as separate establishments.

Retail Trade sector. Leased departments are treated as separate establishments and are classified according to the kind of business they conduct. For example, a leased department selling shoes within a

Operating Costs Estimates

Accommodation and Foodservices sector. Leased departments are treated as separate establishments and are classified according to the kind of business they conduct. For example, a leased department selling gifts/souvenirs within a hotel would be considered a separate retail establishment under the "gift, novelty, and souvenir stores" classification.

Auxiliaries sector. In the Standard Industrial Classification (SIC) system, auxiliary establishments (i.e., those establishments primarily serving other establishments of the same enterprise) were classified i

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Appendix

industry of the establishments served. In the North American Industry Classification System (NAICS), auxiliary establishments are classified according to the services performed rather than the industry served.

Sales, Shipments, Receipts, Revenue, or Business Done

General Definition

Includes the total sales, shipments, receipts, revenue, or business done by establishments within the scope of the economic census. The definition of each of these items is included in the information provided below.

Sector-Specific Information

Construction sector - Includes the value of construction work and other business receipts for work done by establishments during the year. Included is new construction, additions and alterations or reconstruction, and maintenance and repair construction work. Also included is the value of any construction work done by the reporting establishments for themselves.

Speculative builders were instructed to include the value of buildings and other structures built or being built for sale in the current year but not sold. They were to include the costs of such construction plus normal profit. Also included is the cost of construction work done on buildings for rent or lease.

Establishments engaged in the sale and installation of such construction components as plumbing, heating, and central air-conditioning supplies and equipment; lumber and building materials; paint, glass, and wallpaper; electrical and wiring supplies; and elevators or escalators were instructed to include both the value for the installation and the receipts covering the price of the items installed.

Excluded was the cost of industrial and other specialized machinery and equipment, which are not an integral part of a structure.

Finance and Insurance sector - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees from all sources, rents, net investment income, interest, dividends, royalties, and net insurance premiums earned. Revenue from leasing property marketed under operating leases is included, as well as interest earned from property marketed in the census year under capital, finance, or full payout leases. Revenue also includes the total value of service contracts and amounts received for work subcontracted to others.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Information sector - Includes receipts from customers or clients for services rendered, from the use of facilities, and from merchandise sold, whether or not payment was received. Receipts include royalties, license fees, and other payments from the marketing of intangible products (e.g., licensing the use of or granting reproduction rights for software, musical compositions, and other intellectual property). Receipts also include the rental and leasing of vehicles, equipment, instruments, tools, etc.; total value of service contracts; market value of compensation received in lieu of cash; amounts received for work subcontracted to others; dues and assessments for members and affiliates; this establishment's share of receipts from departments, concessions, and vending and amusement machines operated by others. Receipts from services provided to foreign customers from U.S. locations, including services performed for foreign parent firms, subsidiaries, and branches are included. For public broadcast stations and libraries, include receipts from contributions, gifts, grants, and income from interest, rental of real estate, and dividends.

Receipts DO NOT include sales and other taxes collected directly from customers or clients and paid directly to a local, state, or Federal tax agency. Also excluded are gross receipts collected on behalf of others; gross receipts or departments or concessions operated by others; sales of used equipment previously rented or leased to customers; proceeds from the sale of real estate (land and buildings), investments, or other assets (except inventory held for resale); contributions, gifts, grants, and income from interest, rental of real estate, and dividends EXCEPT for public broadcast stations and libraries; domestic intracompany transfers; receipts of foreign subsidiaries; and other nonoperating income.

Management of Companies and Enterprises sector- For holding companies, revenue includes revenue of only the holding company establishment, including net investment income, interest, and dividends.

Manufacturing sector - Covers the received or receivable net selling values, f.o.b. plant (exclusive of freight and taxes), of all products shipped, both primary and secondary, as well as all miscellaneous receipts, such as receipts for contract work performed for others, installation and repair, sales of scrap, and sales of products bought and resold without further processing. Included are all items made by or for the establishments from materials owned by it, whether sold, transferred to other plants of the same company, or shipped on consignment. The net selling value of products made in one plant on a contract basis from materials owned by another was reported by the plant providing the materials.

In the case of multiunit companies, the manufacturer was requested to report the value of products

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transferred to other establishments of the same company at full economic or commercial value, including not only the direct cost of production but also a reasonable proportion of "all other costs" (including company overhead) and profit.

Mining sector - Includes the net selling values, f.o.b. mine or plant after discounts and allowances, excluding freight charges and excise taxes. Shipments includes all products physically shipped from the establishment during the year, including material withdrawn from stockpiles and products shipped on consignment, whether or not sold in the current year. Prepared material or concentrates includes preparation from ores mined at the same establishment, purchased, received from other operations of the same company, or received for milling on a custom or toll basis. For products transferred to other establishments of the same company or prepared on a custom basis, companies were requested to report the estimated value, not merely the cost of producing the items. Multiestablishment companies were asked to report value information for each establishment as if it were a separate economic unit. They were instructed to report the value of all products transferred to other plants of the company at their full economic value; to include, in addition to direct cost of production, a reasonable proportion of company overhead and profits. For all establishments classified in an industry, value of shipments and receipts includes (1) the value of all primary products of the industry; (2) the value of secondary products which are primary to other industries; (3) the receipts for contract work done for others, except custom milling; and (4) the value of products purchased and resold without further processing. Receipts for custom milling are not included to avoid duplication with the value of custom milled ores included in an industry's primary and secondary products. Some duplication exists in industry and industry group totals because of the inclusion of materials transferred from one establishment to another for mineral preparation or resale.

Professional, Scientific, and Technical Services; Administrative and Support and Waste Management and Remediation Services; Educational Services; Health Care and Social Assistance; Arts, Entertainment, and Recreation; and Other Services (Except Public Administration) sectors - TAXABLE ESTABLISHMENTS:

Includes receipts from customers or clients for services rendered, from the use of facilities, and from merchandise sold whether or not payment was received. For advertising agencies, travel industries, and other service establishments operating on a commission basis, receipts include commissions, fees, and other operating income, NOT gross billings and sales. Excise taxes on gasoline, liquor, tobacco, etc., which are paid by the manufacturer or wholesaler and passed on in the cost of goods purchased by the service establishment are also included. The establishments share of receipts from departments, concessions, and vending and amusement machines operated by others are included as part of receipts. Receipts also include the total value of service contracts, market value of compensation received in lieu of cash, amounts received for work subcontracted to others, and dues and assessments from members and affiliates. Receipts from services provided to foreign customers from U.S. locations, including services performed for foreign parent firms, subsidiaries, and branches are included.

Receipts are net after deductions for refunds and allowances for merchandise returned by customers. Receipts DO NOT include sales, occupancy, admissions, or other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency, nor do they include income from such sources as contributions, gifts, and grants; dividends, interest, and investments; or sale or rental of real estate. Also excluded are receipts (gross) of departments and concessions which are operated by others; sales of used equipment rented or leased to customers; domestic intracompany transfers; receipts of foreign subsidiaries; and other nonoperating income, such as royalties, franchise fees, etc. Receipts DO NOT include service receipts of manufacturers, wholesalers, retail establishments, or other businesses whose primary activity is other than service. They do, however, include receipts other than from services rendered (e.g., sale of merchandise to individuals or other businesses) by establishments primarily engaged in performing services and classified in the service industries.

TAX EXEMPT ESTABLISHMENTS: Includes revenue from customers or clients for services rendered and merchandise, whether or not payment was received, and gross sales of merchandise, minus returns and allowances. Also included are income from interest, dividends, gross rents (including display space rentals and share of receipts from departments operated by other companies), gross contributions, gifts, grants (whether or not restricted for use in operations), royalties, dues and assessments from members and affiliates, commissions earned from the sale of merchandise owned by others (including commissions from vending machine operators), and gross receipts from fundraising activities. Receipts from taxable business activities of firms exempt from Federal income tax (unrelated business income) are also included in revenue. Revenue DOES NOT include sales, admissions, or other taxes collected by the organization from customers or clients and paid directly to a local, state, or Federal tax agency; income from the sale of real estate, investments, or other assets (except inventory held for resale); gross receipts of departments, concessions, etc., that are operated by others; and amounts transferred to operating funds from capital or reserve funds.

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Real Estate and Rental and Leasing sector - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees from all sources, rents, net investment income, interest, dividends, and royalties. Revenue from leasing property marketed under operating leases is included. Revenue also includes the total value of service contracts, amounts received for work subcontracted to others, and rents from real property sublet to others.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Retail Trade sector - Includes merchandise sold for cash or credit at retail and wholesale by establishments primarily engaged in retail trade; amounts received from customers for layaway purchases; receipts from rental of vehicles, equipment, instruments, tools, etc.; receipts for delivery, installation, maintenance, repair, alteration, storage, and other services; the total value of service contracts; and gasoline, liquor, tobacco, and other excise taxes which are paid by the manufacturer or wholesaler and passed on to the retailer.

Sales are net after deductions for refunds and allowances for merchandise returned by customers. Trade-in allowances are not deducted from sales. Sales do not include carrying or other credit charges; sales (or other) taxes collected from customers and forwarded to taxing authorities; gross sales and receipts of departments or concessions operated by other companies; and commissions or receipts from the sale of government lottery tickets.

Sales do not include retail sales made by manufacturers, wholesalers, service establishments, or other businesses whose primary activity is other than retail trade. They do include receipts other than from the sale of merchandise at retail, e.g., service receipts, sales to industrial users, and sales to other retailers, by establishments primarily engaged in retail trade.

Transportation and Warehousing sector - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees for arranging the transportation of freight.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Utilities sector - Includes revenue from all business activities whether or not payment was received in the census year.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Accommodation and Foodservices sector - Includes sales from customers for services rendered, from the use of facilities, and from merchandise sold. Also includes dues and assessments from members and affiliates.

Sales do not include carrying or other credit charges; sales (or other) taxes collected from customers and forwarded to taxing authorities; gross sales and receipts of departments or concessions operated by other companies; and commissions or receipts from the sale of government lottery tickets.

Excludes sales from civic and social organizations, amusement and recreation parks, theaters, and other recreation or entertainment facilities providing food and beverage services.

Number of Employees

General Definition

Paid employees consists of full-time and part-time employees, including salaried officers and executives of corporations. Included are employees on paid sick leave, paid holidays, and paid vacations; not included are proprietors and partners of unincorporated businesses. The definition of paid employees is the same as that used on IRS Form 941.

Sector-Specific Information

Construction and Manufacturing sectors. Comprises all full-time and part-time employees on the payrolls of establishments who worked or received pay for any part of the pay period including the 12th of March, May, August, and November, divided by 4.

Finance and Insurance sector. Includes all employees who were on the payroll during the pay period including March 12. Excludes independent (nonemployee) agents.

Information; Professional, Scientific, and Technical Services; Administrative and Support and Waste Management and Remediation Services; Educational Services; Health Care and Social Assistance; Arts, Entertainment, and Recreation; and Other Services (Except Public Administration) sectors - Includes all employees who were on the payroll during the pay period including March 12. Includes members of a professional service organization or association which operates under state professional corporation statutes and files a corporate Federal income tax return. Excludes employees of departments or concessions operated by other companies at the establishment.

Management of Companies and Enterprises sector. Includes all employees who were on the payroll during the pay period including March 12.

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Mining sector. Also included are employees working for miners paid on a per ton, car, or yard basis. Excluded are employees at the mine but on the payroll of another employer (such as employees of contractors) and employees at company stores, boardinghouses, bunkhouses, and recreational centers. Also excluded are members of the Armed Forces and pensioners carried on the active rolls but not working during the period. Includes all employees who were on the payroll during the pay period including March 12.

Real Estate and Rental and Leasing sector. Includes all employees who were on the payroll during the pay period including March 12. Excludes independent (nonemployee) agents.

Retail Trade and Accommodation and Foodservices sectors. Includes all employees on the payroll during the pay period including March 12. Excludes employees of departments or concessions operated by other companies at the establishment.

Transportation and Warehousing sector. Includes all employees who were on the payroll during the pay period including March 12.

Utilities sector. Includes all employees who were on the payroll during the pay period including March 12.