

NWX-US DEPT OF COMMERCE

Moderator: Anthony Eremitaggio
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2:00 pm ET

Coordinator: Good morning or good afternoon everyone and thank you all for holding. Your lines have been placed on a listen only mode until the question and answer portion of today's conference. During the question and answer session you can press Star then 1 on your touchtone phone to ask any questions over the phone line. Please be sure your phone line is unmuted and state your name at the prompt so we can announce your name prior to you're asking your question.

Today's call is being recorded. If you have any objections please disconnect at this time. And I'd like to turn our call over to our first speaker, Mr. Andrew Hait. Sir you may begin.

Andrew Hait: Great thank you so much. Thank you everyone for taking time out of your busy day to join our webinar today. Again my name is Andy Hait. I'm an Economist here at the U.S. Census Bureau at our headquarters' office in Maryland. I'm actually calling to you from home teleworking. As you all know we're 100% telework at census. So if you hear any strange dog barking or other strange noises you'll understand that no I'm not here at the office.

So today's webinar is going to be an update on where we are with the local area data from the 2017 Economic Census. As many of you already know, we started releasing data from the economic census in September of last year in January we began releasing our local area data. So this webinar today is going to be focusing on the data that we have released so far for Alaska, Idaho, Montana, Oregon, Utah, Washington and Wyoming. This is the third in a 20-part webinar series.

The Tuesday webinars will always be geography-based data for specific states. And the Thursday webinars are going to be for individual sectors. So this Thursday's webinar -- the 26th -- is a webinar on the Transportation and Warehousing sector which as many of you can probably guess is a very important one in that it states not just in general terms but especially true right now with everything that's been going on in our economy in the last few weeks.

So to get us started I want to talk a little bit about what is the U.S. Census Bureau. By now every one of us should have received either a letter with a postcard or a letter with a form from the Decennial Census. However, the Decennial Census is not the only thing we do at the U.S. Census Bureau. We conduct more than 130 monthly, quarterly, annual and periodic programs as part of the Census Bureau's mission.

Those programs include demographic programs, like, the Decennial Census. But it also includes a really fantastic program called the American Community Survey or the ACS. The ACS replaces what used to be the old Decennial Census long form and now provides a rich set of demographic, socioeconomic and even housing data every single year. For those of you who are not already using the data from the American Community Survey I would highly encourage you all to check it out. It forms the basis of a lot of the research that businesses do to understand their customers.

In addition to those demographic programs, though we conduct 58 business surveys. Two of them are here on the slide and that is the census of governments and the economic census. These two programs are conducted every five years on the years ending with two and seven. So 2017 is our latest

economic census year. And these two programs work hand in hand to measure the private sector and the public sector economy.

When we talk about those 58 different programs, I love to use this pyramid as a visualization to understand the hierarchy of these different programs. At the very top of the pyramid is our monthly and quarterly surveys. These are the surveys that you hear about on the evening news. The monthly retail sales report or the monthly trade imports and exports data report or some of those other very, very timely economic indicator surveys.

Seventeen of the 22 economic indicator surveys are actually done by the U.S. Census Bureau and these provide very timely data but fairly limited in terms of detail. Fifteen of those 17 surveys only publish data at the national level. Two of them do provide some more detail.

Below the monthly and quarterly surveys are our annual surveys. We conduct 20 different annual surveys that measure nearly every sector of the U.S. economy. They include sector specific programs, like, the annual survey of manufacturers and they also include programs that cover all sectors of the economy, like, county business patterns or non-employer statistics.

What we're going to spend today talking about is the base of the pyramid - the economic census. This is our program that we do every five years as I mentioned and it is our most comprehensive and detailed program we conduct at the Census Bureau.

When we talk about the economic census there's a number of things that are sort of important points to understand. First of all, it is the most detailed program that we publish in terms of industry breakouts. We publish data for nearly every two through six digit North American Industry Classification

System or NAICS codes that we cover at the Census Bureau. There are some exclusions in the economic census. The biggest exclusion is the agriculture sector, which is NAICS 11. That is because the U.S. Department of Agriculture publishes data from the census of agriculture.

I've also provided here on the slide a link to the other exclusions that we have. And I just want to quickly point out to you all that after our webinar today not only will the recording and a transcript be provided but so will the actual presentation itself. So you don't have to frantically write down that URL to understand what else is excluded.

For example, that exclusion file excludes colleges and universities because of the National Center for Education statistics, which is detailed data on those types of businesses. The economic census is our most detailed program in terms of geography too. The census provides data not only at the national and state level but even by metropolitan area, county and place. Place is our term that we use at the Census Bureau to talk about cities, towns, villages and boroughs.

In the economic census, we recognize every incorporated city and unincorporated area or what we call a census designated place that has at least 2,500 people living there or 2,500 people working there. So that 2,500 cut off is a key cut off for separate inclusions in the economic census. Communities that have fewer than 2,500 people that live or work in the community are counted in the economic census. They are just included in something called the balance of county, which is the term that we use in the econ side.

The economic census is also our most detailed program in terms of other dimensions that we publish at the Census Bureau. I get questions a lot about business side data. Users will ask me "Andy does census have data on small businesses?" And my answer is yes we do.

But I always then ask them well what do you mean by small? Are you talking about small individual businesses what we all an establishment or are you talking about small companies what we call a company or a firm? Are you talking about small as defined by employment size - how many employees a business has - or is your definition of small based upon what their revenues are?

The economic census publishes detailed data not only by employment size and revenue size but also by size of the establishment or size of the firm. We even have other detailed dimensions, like, franchise status. Users often will ask me “Andy, I’m thinking about opening a restaurant and I’ve been debating whether or not I want to be a franchise, I want to purchase the franchise for my restaurant or just open Andy’s Bar and Grill. What do you think? Does census have any data that can help me?” And in short yes we do. The economic census does publish data for over 300 detailed industries on franchise status.

The economic census is also our most detailed program in terms of the data variables that are shown. It includes core statistics, like, the number of businesses or what we call establishments, employment, payroll and some measure of output, whether that is sales, shipments, receipts or revenue. But we also publish detailed information that is specific to individual sectors of the U.S. economy. For example in the manufacturing sector, we publish detailed information on inventories, capital expenditures, assets, depreciation, et cetera.

The fifth bullet here is about our product line data, which is again unique to the economic census. Product lines measure the individual products or services provided by businesses. So if I was looking at data for the grocery

store industry, I could look at total revenue, total sales or grocery stores. But I might be interested in finding out how much canned vegetables do grocery stores sell versus how much chicken do they sell versus how much broccoli do they sell. These detailed product lines are published in our product line statistics that again is one of the key attributes - key unique variables that is published in the economic census.

In terms of where you can go to get data from the economic census. For this census we are releasing all of our data in the economic census on our brand new data.census.gov platform. We'll learn a little bit more about that later. But we also are releasing the economic census on two other data tools - Census Business Builder and QuickFacts. There are a few others that may have this data as well.

Now at the very bottom of the slide I've included a note about data that we publish at the Census Bureau based upon the race, ethnicity, gender and veteran status of the business owner. Historically we have published a survey called the Survey of Business Owners that was conducted on the same year as we do the economic census that measures that detailed data on business ownership.

A couple of years ago we added a brand-new survey called the Annual Survey of Entrepreneurs. ASE is supplemented annually. The data that was published every five years as part of the survey of business owners or SBO.

Starting in the spring we will be releasing brand-new data in a brand-new survey called the Annual Business Survey or ABS. ABS will replace both SBO and ASC and we'll publish similar statistics on the race, ethnicity, gender and veteran status of the business owner as well as a lot of other detailed data.

Now as you can probably tell this economic census is so comprehensive that it takes a while to get all the data released. What you're seeing on your slide right now is a screenshot of our release schedule; our calendar that shows when are all the data from the economic census are coming out. In September of last year, we released something called the First Look Report at the very top of this chart on the left-hand side.

The First Look provided national level estimates for every two through six-digit industry that we publish in the economic census. The data are preliminary. These national level numbers will be superseded when we release the national level numbers at the end of the local area data releases - the geographic area that's affixed which is over on the left-hand side as well.

Geographic Area data started coming out in January and will complete by November of 2020 of this year. I have it on good authority though that we are likely to complete that data much earlier. The bottom of the slide I have provided a link to this release schedule. So if you want to kind of look at this in a little bit more detail you can.

Now as we are flowing out that data from the geographic area series one of the things that users often ask us is "Why do you flow it out the way you do and what is that flow?" Users have historically said it looks like you start on the West Coast and on the East Coast and slowly work your way toward the center of the nation. Why is that? And this is mostly a function of metropolitan areas.

It's easier for us to publish data for states who have metropolitan areas that are fully enclosed within that state because if you think about the ability for us to publish data for that metropolitan area, when we publish the metro area we

publish not only the metro as a total, but also all of the counties that make up that metropolitan area. Metropolitan areas that are totally within a particular state we can publish all those counties and that metro area total in one package. But for metropolitan areas that straddle state boundaries it makes it harder because we have to review the data for all those neighboring states at the same time as when we release the data for the metropolitan areas as a whole.

Now to help users understand this flow of these data we have a geographic area series release resource page on our economic census Web site. At the top left of the slide you can see the URL to that release schedule. When you go to the release schedule page, you will see three pieces of information. At the very top, you'll see an Excel file of what has been released. We update this Excel file every Monday and that file reflects all of the data that has been released through that date.

Below that at the bottom of the page we have a link to an Excel file that provides information on what's coming in the next 30 days. So if the data that you care about or the state or the sector that you're interested in are not yet released, you can check this upcoming release's file to see if it is scheduled for release in the next 30 days.

In between those two resources is the graphic that's over on the right-hand side of the slide. This graphic - this state visualization - allows users to go in and graphically see what states and what sectors have been released. When a state has a peach fill in it that means that we have started releasing data for that state. Once that state is completely finished - all the data released - the entire state will then be filled in that peach color.

So you can see we've got a lot of West Coast states - Alaska and Hawaii and we've been working also on the East Coast states as well. In this visualization, there are a couple of really nice features. In the bottom right-hand corner is a donut chart that shows us the percentage of the data that have been released as of the date of this visualization. My slide's a little bit old. This is as of March 12. So as of March 12 we had released 38% of all of the data that's released as part of the geographic area series.

At the very top of the slide of the visualization, though there's a menu. And in that menu I can choose a particular sector of the U.S. economy. So let's say I'm interested in the healthcare sector. I could choose healthcare from that menu at the very top. And then the map would repaint and would allow me to see what are all the states that we have released healthcare data for yet.

In providing those lists of states that have released data when you click on a particular state you get a link first that shows all of these sectors that have been released for that state. So for example if I were to click on Alaska on this graphic, I would see that 14 of the 18 economic census sectors have been released. In that list of released sectors I could then click on one of those links and it would actually bring me straight into data.census.gov right to the data for that sector and for that state.

So I'm really encouraging you all to check out this release visualization, bookmark it and periodically come back to it because it gives you a really nice shortcut to get into our brand-new data.census.gov platform.

At the very bottom of the slide I just wanted to mention that the data for Alaska and Montana was actually some of our first states that we started releasing in January. Those data started coming out on January 16. The other states that we're talking about today - Idaho, Oregon, Utah, Washington and

Wyoming all started on January 23. So you can see we've been making pretty good progress on these data.

Now when we talk about the economic census one of the things that we like to talk about is the key changes that you're going to see in the economic census. Because this is our baseline and benchmark survey we implement a lot of changes in the economic census that are then reflected in the monthly, quarterly and annual programs that occur after the economic census.

For example, the boundaries of geographies change all the time. Some of us may not be aware of this but even counties can change from year to year. Places change all the time. Metropolitan areas also change. And of course ZIP Codes are at the whim of the United States Postal Service. They change even on a monthly basis.

So in the next couple of slides we'll be talking about some of those geographic area changes that you're going to see in looking at the data from the 2017 Economic Census for these states that we're going to talk about today.

I want to bring this up about geography change. It's the very important concept not only for users of Census Bureau business data but users of other business data as well. Often I will talk with a user who is comparing data for their local economy over the last 5 or 10 years. And they're saying, you know, Andy the data is showing that there's this really big increase in this particular city and it just doesn't seem right to me. It doesn't seem like we really have grown as much as this data might indicate.

Well if you then look at the change notes for that geography, you might then discover that the boundaries of that city actually grew; the city annexed some neighboring land. And maybe some amount of the growth of that city over

those last 5 or 10 years were due to the annexation, not due to actually real economic growth.

So anytime you're doing time series comparisons of business data, and again I'm going to stress this not only for the Census Bureau's business data but for business data in general, we always recommend you check to make sure that the thing you are comparing is in fact comparable. And one of the things that you want to check on is that it is geographically comparable.

Now in addition to geographic area changes we also make changes to the North American Industry Classification System or NAICS system and we'll spend a little bit of time talking about that. And then finally at the end of the presentation we'll talk a little bit about this new NAPCS system - the North American Product Classification System and some of the other changes that you're going to be seeing.

So let's start off with those geography changes. And there's going to be a couple of slides here - one for each state. I would encourage you all who are interested in a particular state when you get this Excel file or, excuse me, this PowerPoint file, to go ahead and download it, print off this particular page, and keep it to the side.

So for the state of Alaska there were no metropolitan area changes from 2012 to 2017 economic census. That means that I can compare the data for the Anchorage metropolitan area between 2012 and 2017 and know that that data are completely and totally comparable.

However, there are 55 economic places that had some type of change. Twenty-five of them had area gain, 25 of them lost some area, 2 of them had a name change and there were 2 brand-new places that we recognized for the

first time in the 2017 economic census. They are over on the right-hand side. They include Care Bank's Northstar Borough and Valdez Cordova census area. Those two areas are brand-new places - excuse me, Ester CDP and Cordova city, are two brand-new places that we are recognizing for the first time in the 2017 economic census.

Normally the reason why we recognize a brand-new place is because the population of that area has grown to the point that it now meets that 2,500 minimum criteria that I mentioned earlier.

And finally there were no dropped places. There are no places in Alaska that had qualified for the 2012 economic census and now don't qualify in the 2017. At the very top right of this slide and all of the other slides that we're talking about in the next couple of slides, I've provided a link to our geography's page where you can go in and not just see these high-level totals - 55 places with area gain, but you can actually go in and actually see which places by name had area gain.

A lot of times users assume the only places that are gaining or losing area are small geographies. That certainly is not true at all. For example, the city of Anchorage actually gained area between 2012 and 2017 and the city of Barrow, Alaska lost area.

The bottom of the slide is a link to our TIGERweb Econ resource. This is a Web based interface that allows you to not only learn about these changes from a list perspective but actually see those changes on a map.

For example, the town that I live in had a boundary change from the last economic census. That boundary change annexed some land that is adjacent to the town that I live in. In that land that they annexed, all that exists there -

the only things that were on that land - were businesses. There were 27 businesses that were in that area that had been in that area for quite some time but were not considered part of the town that I live in.

There were no houses though in that area. So by looking at the TIGERweb Econ I could see what is that piece of land that now constitutes the barrier and the boundary change. And that means I can now go in and say well I know that there were businesses that were there but there's no people. So that means that that boundary change is important when you think about the business data -- the economic data from my town -- but it's not important from a demographic perspective because that boundary change had no impact on the demographics of Crofton, Maryland.

So let's talk a little bit about Idaho. So, just like with Alaska, we had no metropolitan area changes but 103 economic place changes. Fifty-four were gains, 47 with area loss, one place that had a name change. Boundary County actually had a name change. One brand-new place - the city of Bellevue - and again no dropped places.

Over on the right-hand side is a small screenshot of a piece of the geo notes file for the state of Idaho. So you can go in and actually see what were those areas that had a change. So American Falls city at the very top had area loss. Right underneath it, Ammon city had area gain. Bellevue city is that third line that has - that was a new economic place. These types of resources, these geo note files are all available on that geography's page in the upper right-hand corner.

Looking at the state of Montana once again there are no metropolitan area changes. But 97 of the economic places in Montana had some type of

boundary change. Forty-six places had area gain, 46 with area loss. No places had a name change or brand-new places and no dropped places. In looking over on the right-hand side, we can see a little piece of our geo notes file that list what are those four added places.

You'll notice that Big Sky CDP and Pueblo CDP were added. Those blue highlighted ones mean that the city of Blue Sky -- that particular census designated place - actually straddles both Gallatin County and Madison County. So we've added a geography that actually is in multiple counties in that state.

Okay. For Oregon, again no metropolitan area changes but 137 economic place changes; 79 with area gain, 50 with area loss. No places with a name change, 7 new places and 2 dropped places. On the right-hand side we can see where are those 7 new places that actually qualified.

And again to the point I was making before about changes to geography are not just for small towns. The city of Portland actually had area gain and the city of Astoria, Oregon had area loss.

For the state of Utah, once again there were no metropolitan area changes. But you can see the following list of types of other changes that did occur - 152 economic place changes in total. The city of Salt Lake City actually gained area and the city of Provo, Utah lost area between '12 and 2017.

The last couple of states I want to talk about are Washington State. Again there are no metropolitan area changes. But 277 economic place changes - 156 places that had area gain, 112 that lost area and you can see the other statistics here.

So again I just want to reiterate that showing - understanding the geography changes is really important when you're then comparing data over time because you want to make sure that the data in fact you're using is comparable. That geography page I have a link to in the upper right-hand corner gives you the detail more than what I'm showing here on the slide. And what I always tell people is print these things off and have them when you're using data from other resources so that you can make sure that the comparison you're about ready to make with that other data -- even the third party data - is in fact comparable.

The city of Seattle, Washington had area gain and Tacoma, Washington was one of those cities that had area loss.

And finally we'll finish off with Wyoming. Wyoming once again had no metropolitan area changes. Thirty-one economic places that changed. There were 15 places that had area gain, 15 that lost area. No places that had a name change. A single new place. I'm really sort of intrigued by this called Bar Nunn. I really want to understand where is Bar Nunn and go visit that maybe someday and no dropped places.

Over on the right-hand side again I've got a little screenshot just a piece of the data available for this particular state. Okay.

Okay so let's now talk about the NAICS changes - the North American Industry Classification System changes that we're making in the 2017 economic census. NAICS is a classification that we use to classify every business in the economic census. Every single business establishment gets its own single six-digit NAICS code that identifies the primary activity or is based upon the primary activity of that particular business.

NAICS is a three-country agreement. It was developed by the Office of Management and Budget here in the United States. But it also has participants from Canada and the Mexico statistical agency, INEGI. Having a single consistent classification system helps users compare data across those three North American countries. It was adopted in 1997 and it does get updated every five years. 2017 is our latest update. We do the NAICS updates on the same year as we do the economic census. So the economic census is one of those first programs that we released that has detailed data on the new NAICS basis.

Now when we make changes -- when there are changes made to the NAICS classification system - those changes can be grouped into a number of categories. There are simple recodes where we take one code in 2012 and it becomes a different code in 2017 but where there was no content change. On the following few slides you'll see these highlighted in blue.

There are many to one, or what we call combos, where two or more NAICS codes in 2012 were combined into a single NAICS code in 2017. And then finally there are many to many, which are shown in sort of a peach color on the next few slides, where pieces of NAICS industries were pulled out of one industry and moved to another to better align with the actual activity that's occurring in the United States.

Splitters are cases where you take a single NAICS code on one year and split it into two or more NAICS codes in this year. There were none for the 2017 NAICS system. But there were a couple in the 2012 NAICS system, including brand-new industries for solar, wind, geothermal and biomass electric power generation.

These slides now talk about the NAICS changes themselves. So you can see that there are three sectors listed here. The mining sector, the manufacturing sector and the retail trade sector all had NAICS changes for 2017. Just like those geography changes we were talking about, it's important to understand how NAICS is changing when you're looking at the local area data because sometimes those NAICS codes may disappear or may have changed. And you may think that a certain change occurred when in fact it really was more a figment of the NAICS change.

So for example over on the right-hand side you can see that we have this grouping of four industries for household appliances - household refrigerator, household laundry equipment and other major household appliance manufacturers. Those four industries existed in the 2012 NAICS system. And they have now all been combined into a single NAICS code for major household manufacturers in 2017.

So if I was looking at data for 2012 and I wanted to see how has this industry changed between 2012 and 2017, I would no longer be able to find the data for those four separate codes. I would have to add those four codes together to create the new total for major household manufacturers.

It's the same for the retail trade sector. We used to publish detailed data specifically for electronic shopping, electronic auctions and mail order houses. But because of the consolidation that has occurred in those three industries between 2012 and 2017, we now have a single six-digit NAICS code 454110 for electronic shopping and mail order houses.

Now these couple of slides here - this slide and the next one will give you some high level looks at what these NAICS changes are. I would encourage you all to check out the NAICS Web site to learn more information. And I've

provided that link here in the bottom right of the slide. This NAICS Web site is nice to not only understand the changes for the 2017 economic census but you could also look as far back as the 1997 economic census when NAICS was first born. And this is the place that you can also go to check out the proposed changes for the NAICS 2022.

So as you can imagine because of the three-country agreement the three countries have to work together for quite some time to come up with revisions to the classification system.

These are the last slides on these changes. The Information sector, Real Estate and Rental and Leasing, and the Professional, Scientific, and Technical Services sectors all had changes. In Professional, Scientific, and Technical Services this is where we have the only truly brand-new industry for Research and Development in Nanotechnology. That industry has now matured to such a point, to such an extent here in the United States, that it now warrants having its own NAICS code and the data will now be shown that way.

Now for Real Estate and Rental and Leasing, you can see all of those industries are these one to ones. So if I was interested in finding out just how many videotape and disk rental places are there left in the United States I'm actually quite intrigued to find out. But if there's any left in the United States the NAICS code that we had in 2012 - 532230 that code has now changed and is now 532282.

So often, these recodes happen to better group those industries together into a particular grouping. But they've had no content change. So all of these blue highlighted industries are ones where the data is completely comparable between 2012 and 2017 even though the code has actually changed.

Now we just talked a few minutes ago about where can you go to get all of these data. Data.census.gov of course is the primary place that you want to go for the economic census data. This is our brand-new data dissemination platform that is replacing American FactFinder. American FactFinder will be sunsetted in less than a week. For those of you who are freaking out a little when you hear that, I would encourage you all to go in and check out data.census.gov, check out some of the training materials that we have available and get used to using it because this is where you're going to have to go to get these data.

The economic census data are also released on our most popular census bureau tool, QuickFacts. QuickFacts is found right in the middle of the main Census Bureau homepage. And its key feature is it allows you to go in and find demographic and business data for a particular specific geography. You can go in and choose up to seven different geographies and compare - for example the nation to a state to a county to a city and even to a zip code.

And finally the third tool I want to quickly mention where you can go to get data from the 2017 economic census is Census Business Builder Version 3.0. We will be releasing the data from the 2017 economic census in the 3.1 release of Census Business Builder, which is scheduled for release in August of this year.

We were going to include these national number levels right away. But we decided to hold off and to wait until the data were complete before we put them into Census Business Builder.

Now as we are releasing these data we also want to promote them via social media. So we have been creating these nice little fun facts that provide a little tiny snippet of information about a given state and about a given sector. So

these are three of the fun facts that we have released so far for Oregon, Utah and the state of Washington. You can see we have used the 50-state quarter that was done for each of those states as part of this visualization. I love them. And I would really encourage you all to tweak them and to send them out to your friends, et cetera.

Bottom of the slide I have a link to the visualization's page where all of these visualizations that have been released are sitting. Right now we have 26 of them released so far including these three. We will have 56 of them by the time we are completely finished with the economic census local area data.

And finally on this slide I want to mention that we write stories in something called America Counts. America Counts is a Web site that provides stories about Census Bureau data. And I actually wrote a nice little story about these fun facts and about how this measures our changing economy in this particular site. And I provided a link to that story here on the slide.

Now I want to quickly highlight some data since I am sure you are curious about the data that are available for these particular states. I have one slide for each state here. Now you will notice that there are a couple of slides, a couple of bars where there's an N/A. We don't publish state level data for three different sectors - Utilities, Information and the Finance and Insurance sectors.

So those are the three where the bar, the revenue bar is N/A. But you can see that in the state of Alaska the retail trade sector actually has the highest sales of any of the sectors that we have released so far. Now I will tell you we have not yet released the data for Mining, for Construction, for Manufacturing or for Management of Companies and Enterprises. Those four sectors will all be released together in August. But I suspect that retail trade will probably continue to be the largest sector in Alaska's economy when it comes to sales.

However when you look over at the right-hand side you can see a pattern that is very common across many states, and that is the boom in revenue in the Healthcare sector. That sector by far has had the largest increase. An increase change of \$1.5 billion between 2012 and 2017. The one bar that is actually negative is actually the Wholesale Trade sector. So while that sector is a very high sector looking at that left chart in terms of total sales that number is actually down quite a bit from the 2012 economic census.

Looking at the data for Idaho you can see again Wholesale Trade is one of those really high sectors. And Wholesale Trade has also had both the largest increase in their sales from 2012 to 2017. Again I want to remind you all that some of these sectors haven't been released yet. And some of them are not available but of the ones that we have published you can clearly see how much the wholesale sector in Idaho has grown.

Looking at the state of Montana we see a similar pattern of Wholesale Trade and Retail Trade really being the dominant sectors in that state. But once again looking at change between 2012 and 2017 we can see the Healthcare and Social Assistance sector has seen the largest increase.

Now in each of these slides we are looking at data for sales. But I also mentioned that the economic census publishes data on numbers of businesses, employment, payroll and a wide variety of other statistics. I picked on revenue as our key statistic to show here because it's one of the statistics that is unique to the economic census publishing this comprehensive data. But you could also look at the other statistics as well.

And I also want to point that while we are looking at data just for the state as a whole, these same types of statistics are available at those lower levels of geography as well. Metropolitan areas, counties, places, et cetera.

Now some of the sectors we only publish data at the state and metro level not the full hierarchy because of privacy. So for example, you think about the numbers of utility companies in the United States. It's the smallest sector in the U.S. economy. So that sector we only publish data at the national, state, and metro level - not the full detail - because there'd be so many suppressions. For the county that I live in, for example, there's only one utility company in that particular county.

Switching gears to Oregon. Once again, we can see Wholesale Trade being our largest sector in the state of Oregon of the published sectors. But we can really see how much the Retail Trade sector has boomed in Oregon between 2012 and 2017 increasing about \$12.2 billion in that five-year period. So that sector is ranked second in terms of total sales but boy has it really grown, growing even faster than the Healthcare sector is growing.

In Utah we see a similar pattern of Wholesale and Retail really dominating. But unlike Oregon, in Utah we see Wholesale and Retail also are the sectors that have the largest increases in sales between 2012 and 2017. We don't see that same sort of increase for the Healthcare and Social Assistance sector, although the number it did increase a good amount. It's just not quite to the point of the wholesale/retail.

For the state of Washington, a similar pattern of Wholesale and Retail really dominating, but again, like some other states, Retail Trade is doing really quite well in the state of Washington, showing the largest gain between 2012 and 2017.

And finally the state of Wyoming we see Retail Trade being slightly larger than the Wholesale Trade sector in terms of total sales. But again, we see Wholesale being up but Retail sales actually being down quite a bit between 2012 and 2017. The Healthcare and Social Assistance sector is that sector that has had the largest increase in revenue.

Healthcare has become one of our largest sectors in the United States. It is the largest employer sector in 32 of our 50 states. And it's actually ranked number 2 in another 10 sectors, in another 10 states. So this is a very, very important sector in the U.S. economy. It's something we are certainly hearing an awful lot about in the news in the last few days and weeks.

Let's now change gears and just close us out today to talk about what's coming next. I mentioned at the very start of the presentation today, that one of the data products we release as part of the economic census is something called product lines. Product lines provide a breakout of the different products and services made or sold by businesses within the United States.

In the 2012 economic census, the way that we published data on product lines for the manufacturing and mining sectors, the construction sector and all other sectors were released completely separately in three very different looking tables.

So if I was the user and I was interested in looking at shoe manufacturers - in the sales and the amount of shoes made by companies in the United States, shoe wholesalers, shoe stores and shoe repair facilities - if I cared about looking at the entire supply chain of shoes - I would have to look at four different tables to find the information for those types of businesses and the products that they make or sell.

Under the North American Product Classification System or NAPCS you will now be able to look at the product line data in one consolidated set of tables that are all done in a consistent manner that will allow users to pull the data together. In the bottom right-hand corner I have included the URL for the NAPCS Web site.

I would encourage you all to check out this Web site. The NAPCS data will be coming out in November of this year. But I would encourage you all to check out that Web site to get a preview of what is going to be coming from the NAPCS Web site from the NAPCS data so you know how to compare them to the 2012 and prior product line's data.

The second thing that we are releasing after NAPCS is our Establishment and Firm Size report. These are scheduled for release between November of 2020 and September of 2021. It's quite a long period of time. And the major change there is that we are consolidating all of those different establishment or firm size tables into seven consolidated tables.

In 2020 - excuse me, in 2012 - we released separate tables for each individual sector. So if I was interested in small manufacturers, small retailers, and small healthcare providers, I would have had to go to three different tables to get the data for those three different sectors. Now we are combining all of the data for those sectors into consolidated tables.

So all of the employment size of the establishment tables are going to be consolidated into one big consolidated table. That will make it much easier for people to be able to pull data by business size across the different sectors.

And finally the last set of data that we released as part of the economic census is the (unintelligible) subject tables. We are going to be dropping some tables this time due to a low response and a few other reasons. But there are a couple of brand-new tables. And again I would encourage you to check out our economic census Web site to learn more about these.

Now way at the beginning of the presentation you might have seen a note about ZIP Code level data from the economic census. And a note that we aren't publishing ZIP Code level data. I've had some users that have said "Oh my goodness Andy, zip codes, I love them. They're the smallest geographies you guys publish in econ. Why are you not publishing zip code data for the economic census?" And my answer is, you don't need to fuss. We actually publish just as good, if you will, say just as much detail - zip code data from zip code business patterns our zip code business pattern's program. And those data are available every year not just every five years. So losing the zip code data from the economic census really isn't a big deal because you have that data available from zip code business pattern.

So to summarize, the economic census provides an amazing wealth of business data. Even after more than 30 years at the Census Bureau, I still am astounded by the types of information that we publish in the economic census. And how businesses and others can use that data. To learn more about this incredible wealth of data I would encourage you all to check out our economic census Web site.

Because we release so much data, the data are released on this flow basis. We spent a good part of the webinar today talking about that flow, how it compares to the geographic area statistics. All states and sectors should be completed by around August of this year. But then there's more data coming after that. Again, I would encourage you all to check out our census Web site

and specifically the news release's page to find out information about that flow of data to find out when is the sector and state that you care about going to be released.

I really would encourage you all to check out our geographies page to learn about the geographic changes, so that when you are comparing data, whether it's in the Census Bureau or from another source, that you are in fact making good, honest comparisons between geographies over time. And similarly, I would encourage you all to check out the NAICS Web site to learn more about the North American Industry Classification System for 2017 and about those changes.

Finally the last couple of points is that data are now being released on data.census.gov. I would encourage you all to go there and check out that site. There's a lot of great training materials that my colleagues have actually started working on but more data is coming.

So with this I would now like to start opening the questions up for Q&A. My colleague, Lynda Lee, is standing by to take any questions that come in via the chat. And then after we do that we will then go ahead and take any questions over the phone. So operator if you want to say a few things about questions that would be great.

Coordinator: Absolutely. At this time if you would like to ask any questions over the phone lines please press Star then 1 on your phone's keypad. Be sure your phone line is unmuted and state your name at the prompt so we can announce your name prior to you asking your question. Again that is Star then 1 on your phone's keypad to ask any questions over the phone lines.

Andrew Hait: So while we wait for you all to queue up your phones Lynda do we have any questions that came in via chat?

Lynda Lee: Hi Andy yes. At this moment we have three questions in the queue via the chat feature. And our first question is “How does the data compare with the information from the yellow book and what are the similarities and differences?”

Andrew Hait: Yes that’s a great question. So I get a lot of questions that compare Census Bureau data to other data whether those are other government data, like, Bureau of Labor Statistics data or whether that’s other third-party data, like, yellow book data. And what I usually say is there’s a couple of key differences.

First, sometimes our data are more current than the other data and sometimes those other data sources are more current. So for example, I could go into Bing or Yelp or Google to find out how many restaurants are there in Crofton, Maryland. And I would get a list of all of the restaurants that are available there. And that list would be a fairly current list. The latest data people were talking about right now from the census is from 2017. So sometime the third-party data sources are more current than the Census Bureau’s data are and sometimes the opposite. So I would encourage people to use both.

A second big difference that people will see when they’re comparing data across different providers is how those data are processed and supplied to the data provider. At the Census Bureau, most of the economic programs that we conduct are done on a survey basis, where we actually send out forms to businesses. When they complete their form, our analysts review their data and often our analysts have to contact the respondent to clarify answers that they gave that may not sound quite right.

So for example if I was the analyst looking at data for the convenience store industry and I knew that in this particular industry the average payroll per employee of an employee in this particular business is \$22,000 a year. If I saw a business responding to me that they were paying their employees \$220,000 a year, I would probably call them to find out did you maybe add an extra zero to the payroll number to come up with that number.

So we do a lot of analysis of the data. And some of those other data providers out there don't do that kind of analysis. So you're essentially looking at self-reported data that may be perfect or it might not be.

And then the last thing, the last different I also point out when people ask me about comparing that data is the Census Bureau is committed to protecting the privacy of businesses who respond to our surveys. Title 13 and Title 26 of the U.S. Code prevents Census Bureau employees from publishing data that would disclose the identity of individual companies.

So for example let's say Lynda and I owned the only two gas stations in our little town. The Census Bureau would not be able to publish data for gas stations because Lynda could easily subtract her employment and her payroll and her sales from the published total and know exactly what I pay my employees and how many employees I have. That would be a clear violation of my privacy.

Many of these other third-party data providers do not have those same types of privacy protections. So users often say "Andy, it's kind of a bummer that I can't see individual responses individual businesses by name in the economic census." And what I often tell people is use our data to understand the total for a particular industry in a particular geography. And then use that third-party data to understand the details.

Again read the fine print, make sure you know what they do and how they process that data before you do that. But merging our data with theirs can be very, very helpful so great question.

Lynda Lee: Okay and our next question is “Are marijuana industry data collected or plan to be collected?”

Andrew Hait: So another great question. Short answer is yes they are already collected. The longer answer is they do not have their own separate NAICS code. So there is no way to be able to separately identify from these industries where the data are currently being collected and published. There’s no way of separating out how much of that data is specifically for cannabis-related businesses versus other types of businesses.

So for example most cannabis retailers are classified in the same NAICS code as things, like, GNC or other nutrition, you know, nutrition centers, the supplement type stores. That’s the same NAICS code that they use. So there isn’t a separate code for them. I know that there has been some discussion in the NAICS Committee to see about eventually splitting out cannabis-related industries to get them their own particular industry code.

I suspect that one of the things that’s going to have to happen for that to happen is for this industry to grow to a large enough extent that it’s not only clustered in certain states but that it’s across the entire nation as a whole. Because for our ability to publish data for the nation, if that activity is not legal in certain states then we wouldn’t be able to publish that data for it. So yes great question.

Lynda Lee: Andy at this time I have been notified that we have several calls in the queue and we should probably go onto the questions from the phone line.

Andrew Hait: Okay sounds very good Lynda. Again you all see my email address and phone number here on the screen. So whatever questions we can't get to via the chat please feel free to contact me and we'll answer them later. So operator we're ready to take the phone calls.

Coordinator: Absolutely. Our first question, your line is open.

(Caller 1): Yes hi. First of all thank you very much, great job Andy and staff. My question really is the difference between zip codes and census tracts. Are you doing anything with either or both of them? I know you're doing zip codes.

Andrew Hait: Right. So in the economic program's area at census the farthest we go down to is census tract, excuse me is zip codes. We do not publish any data below the zip code level, which would include census tract level data. And as you can probably guess the single biggest reason is privacy. When you start slicing 8 million employer businesses in the United States down to detailed industries and then try to slice and dice it down to individual census tracts, the probability of having a tract that has only one business of a certain type in that tract would mean that we couldn't publish data for that tract for that industry. So we don't even try. Zip codes is the most detail we go.

It is an interesting point though because often census tracts are geographically larger than zip codes. So sometimes zip codes are actually a smaller level of geography than a census tract is. That's especially true in rural America. But even true in some other areas.

So I always tell people look at those census tract boundaries and then look at the U.S. Postal Service zip code boundaries and it may be that the zip code level data may meet your needs even though you may think it might be tract level data. Yes great question.

(Caller 1): Thank you.

Andrew Hait: You're welcome.

Coordinator: And your next question, your line is open.

(Caller 2): Yes hi there. Thank you very much for hosting these. I was particularly interested in the new annual business survey that census is implementing. And first I wanted to confer or to confirm what I think which is that there was in fact no 2017 survey of business owners and no survey of entrepreneurs after 2016. If those are the 2012 and the 2016 were the last ones to happen. And then if that's true when can we expect the release of data from the new survey - American Survey Annual Business?

Andrew Hait: So I will confirm that the 2012 SBO and the 2016 ASE are in fact the latest versions of those two datasets. The first release from ABS is scheduled for this spring. I have it on authority that it might come as early as April with some of our challenges that we're experiencing here in the D.C. area with the federal government being 100% telework that might be delayed a little bit. But I would check back on the ABS Web site to find out more information about when that data are coming out.

What is also being worked on right now is in deciding exactly what levels of detail are going to be published in the ABS versus in the previous SBO and ASE. SBO used to publish data down to the place, down to...

(Caller 2): Okay.

Andrew Hait: ...cities and towns. Whereas ASE was only shown annually down to the state level. In replacing both SBO and ASE, ABS will probably similarly have a mixture of geographies that are published more detailed every five years and less detailed on the years in between. But again I would definitely check out that ABS Web site. They're going to have a lot of great information. I get a lot of questions about that program.

(Caller 2): Thank you very much.

Andrew Hait: You're welcome.

Coordinator: Your next question, your line is open.

(Caller 3): Hello Andy thanks for hosting me. I'd like to ask compared to coming out of past recessions is the wholesale or retail trade on a similar course percentage wise as with Americans incomes, are their salaries and wages stagnating or are the percentages similar to past recessions coming out of them or have the percentages fallen in the growth of the retail and wholesale sectors especially the wages and the income stagnated of Americans.

Andrew Hait: Yes so that's a great question. Probably a little bit much for me to do to give you a good thorough answer as an economist on the phone. What I'd suggest is to maybe send me an email with your question to the email address here on the screen and we can kind of go to it that way.

What I will definitely tell you is when you look at the growth in the retail industry which of course is an industry who's customers are the general

public, the growth in that industry is much more tied to individual's personal income and what they're spending power is than the wholesale sector. The wholesalers by definition are an intermediary in between the manufacturer or even in some cases the importer and the final retailer.

So the movement of their goods it has a very different sort of flow. So often wholesale trade is less impacted by things, like, income change than the retail sector is. But we can definitely talk about this some more in more detail.

(Caller 3): Okay thank you.

Andrew Hait: You're welcome.

Coordinator: And your next question, your line is open.

(Caller 4): Hi. When the not available is expressed on the charts does this mean the data is incomplete or that the statistics are unavailable or possibly under a different sector? What would that sector be? Example for...

Andrew Hait: Yes so that's a great question. So you're talking about when we were looking at those different bar charts for each state I had mentioned that data for the utility sector, for finance and there was a third one I'm having a brain cramp right now. I can't remember what the third one was. But the data...

(Caller 4): I think it was...

Andrew Hait: Mineral.

(Caller 4): Yes it was, like, minerals and that would kind of fall into well water.

Andrew Hait: Right. So for the utility sector and for the finance sector the single biggest reason why revenue data are not available - well let's pick on finance first. The reason why the revenue data are not available at state level below is because when you think about the typical finance companies let's pick on banks specifically. The bank's revenue - the employment and the payroll of bank workers is easily associated with the individual branches or offices that those workers work in.

So the ability for us to publish local area data on the number of banks, branches, the number of bank employees and the number of banking payroll of those employees is really easy because those workers are actually working at a single physical location. So we can actually tabulate the data. But when you think about the revenue of banking and this is also true in a way for the other sectors. It's very hard to tag if you will to associate the revenue of that business with a specific geography, with a specific location because that bank's revenue may be generated from things that cannot be associated with a particular thing.

So to give you a specific example. If you go to your local bank and you take out a small business loan at that local bank branch for your small business, should the revenue that comes to that bank from the sale of that loan to you, should it all be associated with that one particular branch or should it be more associated with the larger bank because when you start paying that loan back, you're going to be paying it back to the bank not to that specific branch location.

So we don't actually publish the detailed data on revenues by that geography because associating that geography, that revenue with a specific geographic area is just - it's impossible. It's not that the activity is published somewhere else, it's just that we don't tabulate the data, that revenue for that level of

geography. The data are published nationally. They're just not published at the lower level of geography. That's a complicated answer but does that make sense?

(Caller 4): Yes so what would be the national geography site to look up how many gallons of water are being pumped through certain sectors?

Andrew Hait: Right. So specifically for water consumption there's actually another source of information that I can refer you to. Go ahead if you can send me an email to my email address up here on the slide - andrew.w.hait@census.gov I'll actually put you in touch with the person at the federal agency that has really good data on water consumption.

(Caller 4): Cool, thank you very much.

Andrew Hait: You're welcome.

Coordinator: And your next question, your line is open.

(Caller 5): Yes hi thank you, great job Andy. I really appreciate all the information that's provided. Quick question in regards to future data. Now I know that you shared information about the statistics and the data collected for 2017. However in the now in the real time 2020 is there any algorithm that you use to project or forecast data for this time? I know that actual data would be, you know, presented at a later time. But is there an algorithm to use as a right now to project statistical data for this time?

Andrew Hait: So that's a great question. When we were talking in the very beginning of the presentation about all of the different surveys that we conduct at the Census Bureau I mentioned that we do 58 different business surveys. And those

include monthly and quarterly surveys and annual programs. So what users often do is they use the economic census to look at data at a much more detailed industry and geographic basis albeit old data - the data from 2017 that we're publishing right now for calendar year 2017.

But then what they do is they then use our annual, our quarterly and our monthly data to see what has happened in that industry, you know, since the 2017 economic census data. So we would have for example monthly data on retail sales through February or January I guess, no February. February of 2020 data would be available.

Unfortunately, though those data because they are so timely are only available at the national level. So what users often do - and I can't specifically encourage you all to do that but I know people do this - is they take the national level data -- the current national level data - and they then estimate what that number would be at the state and the metro and the county level based upon the distribution that was published in the economic census. So they basically assume that the growth that has occurred between 2017 economic census and the 2020 monthly data has been uniform across the country and then apply those same distributions across.

Now we don't do that at the Census Bureau. We don't even recommend specifically people do that because again that assumption that that growth is uniform across the nation, may not be true. It may be true in some industries, maybe not in others. But that's sort of the best that we can do is directing you to the more current data that we have and then say, you know, you're going to have to make some leap of faith if you want to try to estimate what that distribution would be at the local area.

(Caller 5): Very good, thank you.

Andrew Hait: You're welcome.

Coordinator: Thank you and currently we have no further question in the queue.

Andrew Hait: Okay. Well again thank you all so much for taking time out of your busy schedules. Apologies for running a few minutes late. Try to keep our webinars to one hour.

I would remind you all again that we have another webinar scheduled for Thursday talking about the transportation and warehousing sector where we'll take a deeper dive into data that we've released for that sector. It's a really interesting one. So I would encourage you all to come back and check out that webinar. And then also check out our webinar's page for the other webinars that we're doing as part of this sector for the rest of the nation. So thank you all so much for taking time out of your busy day and have a wonderful afternoon.

Coordinator: Thank you and this ends today's conference.