

STRUCTURAL INTELLIGENCE BRIEF

Other Services

NAICS 81 — Repair, Religious, Civic & Personal Services



S.J. Bridger

Four Frequencies Framework

April 2026

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Executive Summary

The Other Services sector is the NAICS classification system's catch-all residual category—717,000 businesses that share no unifying production logic, only the shared condition of structural invisibility. Seven hundred seventeen thousand solo proprietors and micro-firms employ 5.1 million workers across the functions that hold daily American life together: repairing vehicles, cutting hair, burying the dead, gathering in worship, caring for pets, cleaning clothes, and sustaining civic organizations where communities once formed. What federal data reveals is not a collection of unrelated service businesses in transition. It is the systematic erosion of the workforce, membership, and economic model that sustained the physical spaces where Americans repair, gather, grieve, and groom.

This brief applies the Four Frequencies diagnostic framework to U.S. Other Services using nine federal data metrics from Census Bureau, Bureau of Labor Statistics, Bureau of Economic Analysis, IRS, FTC, and EPA. It identifies structural conditions that organizational leaders and business owners inside this sector inherit, whether or not they recognize them. The severity scores are not predictions. They are measurements of conditions that already exist.

Three of the four frequencies score VULNERABLE. One scores STRAINED. The sector is losing the workforce, the membership, and the economic model that sustained it simultaneously.



Sector Structural Profile

Other Services (NAICS 81) encompasses four distinct subsectors: Repair & Maintenance (811), Personal & Laundry Services (812), Organizations (813), and Private Households (814). The classification is intentionally broad, capturing everything not classified elsewhere: independent auto repair, religious organizations, civic associations, funeral homes, cosmetology, dry cleaning, pet care, and personal services. The heterogeneity is itself diagnostic. No other NAICS sector serves this range of structural functions.

Radical Micro-Fragmentation

The Other Services sector contains 717,000 establishments with 93.5% operating outside the top four firms. This is extreme fragmentation. The sector produces no consolidated operators with meaningful scale. A typical establishment employs fewer than seven workers. Seventy-nine percent operate with no employees beyond the owner. This radical fragmentation means no operator has meaningful structural buffers. An auto shop owner cannot absorb losing a technician by shifting workload. A funeral home

cannot absorb a cremation rate increase to 61.8% by simply adjusting operations. A 65-person congregation cannot maintain a 400-capacity building. The sector's structural condition is precisely inverted from consolidated industries: no single operator has scaling capacity, and each operator inherits full exposure to sector-level disruption.

Auto Technician Shortage and EV Displacement

The United States faces a shortage of approximately 613,000 automotive technicians. The Bureau of Labor Statistics projects 70,000 annual openings through 2034 against a training pipeline that produces fewer than 40,000 graduates annually—a 4:1 demand-supply gap. The average technician is 40 years old. Degree completions fell 34% from 40,658 in 2012 to 28,866 in 2021. The pipeline is contracting structurally.

The electric vehicle transition compounds this shortage. Electric vehicles have 40% fewer moving parts, eliminating oil changes, spark plugs, and transmission work—the routine services that generate 60% of independent shop revenue. Independent shops operating on 8–15% margins cannot finance the capital transition to EV-ready diagnostic equipment. Manufacturer restrictions on diagnostic software and parts access cost independent shops \$3.1 billion annually in repair data barriers. The structural consequence is that independent auto repair—71% of the market—gradually cedes capacity to dealership networks and corporate chains that can absorb the capital requirements.

Religious Institutional Contraction

Average congregation size collapsed from 137 weekly participants in 2000 to 65 in 2020—a 52% decline. Sixty-eight percent of congregations now operate below 100 members. Weekly church attendance dropped from 32% of Americans in 2000 to 20% in 2025. Approximately 4,000 congregations closed in 2024 versus 3,800 new starts. Seminary enrollment declined from 6,426 seminarians in 1970-71 to 2,686 in recent years—a 58% cumulative decline. Fifty-three percent of clergy are considering leaving the ministry.

The structural reading: congregations with fixed-cost building infrastructure (heating, maintenance, insurance, staffing) face inverted cost-per-member burdens. A 65-person congregation cannot afford to maintain a 400-capacity building. A single clergy departure terminates a congregation with no succession plan. Cremation rate increases to 61.8%—projected to exceed 80% by 2035—displace \$3,000 to \$5,000 in revenue per death from independent funeral homes already operating on 10–15% margins.

Nine Federal Metrics

SOURCE	METRIC	READING
Census	Market concentration (top 4 firms)	93.5% outside; 717K businesses
BLS	Auto technician shortage	613,000 gap; 4:1 demand-supply

SOURCE	METRIC	READING
BLS	Auto trade enrollment change	-3.3% CAGR (2017-2023); overall trades +1.2%
BLS	Auto technician degree completions	-34% (40,658 to 28,866, 2012-2021)
Pew/BLS	Congregation size & attendance	137 to 65 avg; 32% to 20% weekly attendance
NCHS	Cremation rate trajectory	61.8% (2024), projected 80%+ by 2035
AATS	Seminary enrollment decline	-58% (6,426 to 2,686, 1970-2023); -8% YoY recent
Census/BLS	Dry cleaning establishment decline	-1.9% annually; ~30% since pandemic
Gallup	Civic organization membership	6% of Americans; volunteer hours -27.5% (2017-2023)

Sources: U.S. Census Bureau, Bureau of Labor Statistics (BLS), Bureau of Economic Analysis (BEA), Internal Revenue Service (IRS), Federal Trade Commission (FTC), Environmental Protection Agency (EPA), Centers for Disease Control & Prevention (CDC), Pew Research Center, Gallup, American Association of Theological Schools (AATS).

Structural Risk Scenarios

Structural conditions do not predict specific events. They define the envelope of probable outcomes. The following scenarios are structurally plausible given current conditions. They are not forecasts. They are the shapes that failure takes in a sector with this structural profile.

Scenario 1: Succession Deadlock

An independent funeral home director reaches retirement. No internal successor exists. Industry consolidators (Service Corporation International controls 25% of the market) acquire the business. Family-operated funeral homes disappear into corporate chains. This repeats across the sector because no training pipeline produces replacement funeral directors at the rate incumbents retire. The structural condition: succession is the binding constraint across every subsector.

Scenario 2: Infrastructure Abandonment

A congregation reaches an inflection point. Attendance of 65 members cannot sustain a 400-capacity building. Fixed costs (heating, maintenance, insurance, roof repair) exceed giving capacity. The organization dissolves or is absorbed by a larger congregation. The building is sold. The community loses the gathering space. This is not unique to one congregation. It is structural: congregations below 100 members operating at permanent structural deficit.

Scenario 3: Capacity Reallocation

An independent auto shop cannot hire technicians because degree completions declined 34% and the average technician age is 40. The shop cannot service vehicles that require new diagnostic equipment because margins of 8–15% do not finance capital investment. The shop loses customers to dealerships and corporate chains that can hire and equip. Independent repair—71% of the market—gradually cedes

market share. The structural consequence: a sector transition from distributed (71% independent) to consolidated (dealership/corporate).

Each scenario describes a pattern occurring across the sector today. Whether a specific organization experiences them depends on its internal structural profile, which is what the diagnostic measures.

The Diagnostic Gap

This brief assesses structural conditions visible from federal data and public sources. The Four Frequencies framework measures 20 dimensions. Twelve are assessable from public data. Eight require diagnostic access to an organization's internal structural patterns through behavioral intelligence from raters inside the organization.

What Public Data Reveals (12 Dimensions)

The 12 public dimensions capture sector-level structural conditions: workforce supply and demand ratios, market concentration, workforce age distribution, training pipeline capacity, institutional participation rates, and succession readiness signals. These are the dimensions scored in this brief. They describe the structural environment that every organization in this sector inherits.

What Requires Diagnostic Access (8 Dimensions)

Succession Readiness

Whether identified successors can actually absorb the structural load of critical roles. Public data shows 53% of clergy are considering leaving. It cannot tell which specific congregations have successors prepared and which face terminal transition risk.

Decision Authority Distribution

Who can make which decisions, and how far authority sits from the point of impact. Public data shows market concentration. It cannot map the decision architecture inside a specific business or congregation.

Institutional Knowledge Mapping

Where critical knowledge actually lives. Federal data shows auto technician departures. It cannot tell which specific knowledge domains departed with them inside a particular shop.

Cultural Load Distribution

Which informal norms and relationships are currently absorbing structural weight that formal systems have failed to carry. No federal dataset measures this.

Communication Pathway Integrity

Whether information moves through the organization at the speed required for the decisions being made. Only internal assessment reveals the actual communication architecture.

Role Architecture Coherence

Whether the organization's role structure matches its actual operational requirements, or whether critical functions survive on workarounds and informal arrangements.

Adaptive Capacity Under Stress

How the organization's structural profile changes under pressure. The scenarios in this brief describe sector-level patterns. How a specific organization responds depends on dimensions only visible through diagnostic engagement.

Strategic Alignment Depth

Whether stated strategy and actual structural capacity point in the same direction. A congregation pursuing growth while its attendance declines has a strategic alignment problem that only internal data can quantify.

The gap between what is publicly visible and what is structurally real is where organizational risk lives. The brief tells you the weather. The diagnostic tells you whether your roof can hold.

Methodology

The Four Frequencies framework measures structural resilience across four dimensions: Thinness (depth of critical capacity), Permission (distribution of decision authority), Management (leadership and operational effectiveness), and Absence (gaps in critical functions and their consequences). Each frequency is assessed across five dimensions, for a total of twenty structural measurements.

Sector-level assessments draw on federal data mapped to the twelve publicly-measurable dimensions. Organization-level diagnostics add behavioral intelligence from internal raters to score all twenty dimensions. The combination produces the Structural Resilience Index (SRI), a composite score calibrated to a six-band severity scale.

Severity terminology: RESILIENT (structural depth across all frequencies), STABLE (adequate structural capacity with minor gaps), STRAINED (measurable structural pressure in one or more frequencies), VULNERABLE (significant structural gaps with compounding risk), FRAGILE (structural conditions that amplify disruption), CRITICAL (structural failure in progress or imminent).

What This Means for Your Organization

This brief describes the structural environment your organization operates inside. Whether these sector-level conditions are amplified or mitigated within your specific organization depends on your internal structural profile.

The Four Frequencies diagnostic measures all 20 dimensions for a single organization, producing a 40-page structural analysis with the Structural Resilience Index.

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About S.J. Bridger

S.J. Bridger is a structural resilience diagnostics practice. We analyze the structural conditions that determine whether organizations hold together when key people leave, when systems fail, and when the relationships that carried institutional knowledge disappear. The Four Frequencies framework was developed through forensic analysis of organizational failures across multiple sectors and refined through diagnostic engagements that measure what traditional assessments miss.

Structural Intelligence Briefs are published assessments of sector-level conditions. They are updated quarterly as federal data sources release new information. The Other Services brief is the second in a series covering all 20 NAICS sectors.

DISCLAIMER: This Structural Intelligence Brief is a sector-level structural assessment based on publicly available federal data and the Four Frequencies analytical framework. It does not constitute advice to any specific organization. It does not establish a consulting engagement, advisory relationship, or professional obligation between S.J. Bridger and any reader or recipient.

Sector-level structural conditions described in this brief may or may not apply to any individual organization within the Other Services sector. Organizational structural profiles vary based on internal conditions that are measurable only through diagnostic engagement. Decisions regarding organizational strategy, workforce planning, risk management, or any other operational matter should not be based solely on the sector-level findings in this document.

The severity scores, structural risk scenarios, and analytical observations in this brief reflect conditions as of the publication date. Federal data sources update at varying intervals. This brief will be updated quarterly. Prior versions should not be relied upon after a subsequent version has been published.

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