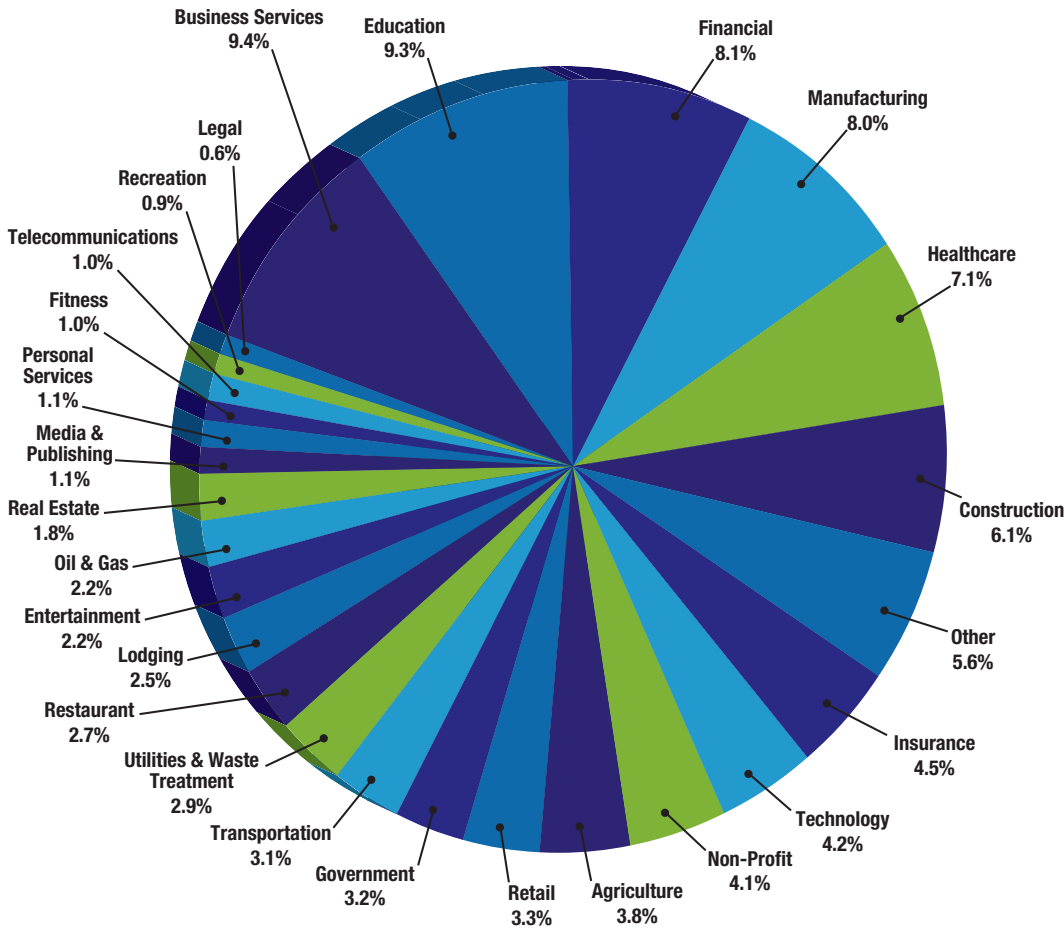


For more than 50 years, PPAI Research remains the industry's leading and trusted source in data and analytics. PPAI Research has estimated the size of the industry since 1965, but the current methodology being used has been in place since 1983. This annual sales study is considered the most definitive and comprehensive of its kind in the promotional products industry based on actual sales reported by U.S. distributor companies. In 2018, the study was conducted by a third-party, independent market research firm, Relevant Insights LLC, on behalf of PPAI and the members they serve. Methodology and detailed findings can be viewed in the full report at ppai.org/members/research.

NEW

The 2017 Sales Volume Study explores industries buying promotional products for the first time since 2007. Industry categories were classified by distributor sales and weighted 58 percent for large companies (over \$2.5 million) and 42 percent for small companies (under \$2.5 million). Distributor promotional products sales in 2017 is estimated at **\$23.3 billion**.



TOP TEN Industries Buying Promotional Products

	Business Services	1
	Education	2
	Financial	3
	Manufacturing	4
	Healthcare	5
	Construction	6
	Insurance	7
	Technology	8
	Non-Profit/Not-For-Profit	9
	Agriculture	10

INDUSTRY CATEGORY

Agriculture: e.g. Corporate & Private Farms, Ranches, Farm Co-Ops, Seed & Agrochemical Producers, Machinery Producers, Landscape Services, etc.

Business Services: [Business-To-Business (B2B)] e.g. HR & Recruiting Services, Advertising & PR Services, Consulting Services, Market Research Services, Translation Services, etc.

Construction: e.g. AC & Heating Services, Architecture Services, Engineering & Design Services, Plumbing Services, Electrical Services, etc.

Education: [Public / Private] e.g. Primary & Secondary Schools (Boarding, Charter, Magnet), Montessori Schools, Colleges & Universities, Technical & Trade Schools, Tutoring Services, Test Prep Services, etc.

Energy, Utilities & Waste Treatment: e.g. Alternative Energy Sources, Sewage Treatment Facilities, Waste Collection Services, Sanitation Services, Remediation & Environmental Cleanup Services, etc.

Entertainment: e.g. Motion Picture Exhibitors, Performing Arts Theatres, Sports Stadiums, Talent Agencies, Art Galleries, etc.

Financial: e.g. Banks, Credit Unions, Venture Capitals, Tax Preparation Services, Accountants, Investors, Credit & Collection Services, Mortgage Brokers, Payment Systems, Title Holding Corporations, etc.

Fitness: e.g. Gyms, Health Clubs, Fitness & Wellness Studios (Yoga, Pilates, Spin, Boxing, Barre), Personal Training, Weight Loss Centers, etc.

Government: [Federal / State / Local] e.g. Government Agencies, National Security, County Governments, Correctional Facilities, State Patrols, City Police, County Sheriffs, etc.

Healthcare: e.g. Pharmaceuticals, Medical Devices, Laboratories, Veterinary Clinics, Hospitals, Independent Practitioners (Dentistry, Optometry, Chiropractic, Physical Therapy), Family Planning Centers, etc.

Insurance: e.g. Life Insurance Providers, Health Insurance Providers, Property & Casualty Insurance Providers, Auto Insurance Providers, Specialty Insurance Providers, Claims Administration Services, etc.

Legal: e.g. Law Firms, Bail Bonds, Process Servers, Private Investigators, Document Review Services, Wills & Estates Practices, Civil Litigation Practices, Corporate Practices, Property Law Practices, etc.

Lodging: e.g. Hotels & Motels, Campgrounds, Vacation Rentals, Bed & Breakfasts, Resorts, Extended Stays, etc.

Manufacturing: e.g. Production Material Manufacturers (Plastic, Glass, Metal), Durable (Furniture, Jewelry) & Non-Durable (Food, Beverage, Apparel) Goods Manufacturers, etc.

Media & Publishing: e.g. Publishers (Book, Newspaper, Directory, Greeting Card), Independent Publishers (Bloggers), TV & Radio Broadcasters, Productions (Film, Music), Photography, etc.

Non-Profit / Not-For-Profit: e.g. Public Charities, Private Foundations, Social Welfare Organizations, Business Leagues (Trade Associations), Fraternal Societies, Religious Organizations, etc.

Oil & Gas: e.g. Crude Oil & Natural Gas Exploration & Production, Gas Stations, Pipeline Transporters, etc.

Personal Services: [Business-To-Consumer (B2C)] e.g. Auto Repair Services, Laundry & Dry-Clean Services, Nanny Services, Delivery Services, Moving Services, Consumer Electronics Repair Services, etc.

Real Estate: [Commercial / Residential / Industrial] e.g. Brokerages, Leasing & Management, Mobile Home Parks, etc.

Recreation: e.g. Amusement Parks, Casinos, Golf Facilities, Country Clubs, Professional & Amateur Sports, Historical Sites, Zoos, Bowling Centers, Ski Resorts, Water Parks, Summer Camps, etc.

Retail: e.g. Department Stores, Supermarkets, Specialty Stores, Wholesalers, Off-Price Retailers, Non-Store Retailers (Catalogue, In-Home, Multi-Level, Vending & Kiosk), etc.

Restaurant: e.g. Full-Service Restaurants (Upscale & Fine Dining), Quick-Service Restaurants (Fast Food, Fast Casual), Bars, Food Trucks, Meal Kit Services, Catering Services, etc.

Technology: e.g. Online Services, IT Services, Application Service Providers (ASPs), Software Providers, Program & Data Processing Services, Records Management Services, Computer Facilities, etc.

Telecommunications: e.g. Local Exchange & Long-Distance Carriers, Internet Service Providers, Communications Networks, Web Hosting Services, Wireless Communications, etc.

Transportation: e.g. Auto Dealerships, Airlines, Ride Sharing Services, Taxi & Limo Services, Vehicle Rental Services, Airports, Freight & Cargo Services (Air, Rail, Truck), Courier Services, etc.

Other: *Specific examples retained by third-party researcher*