



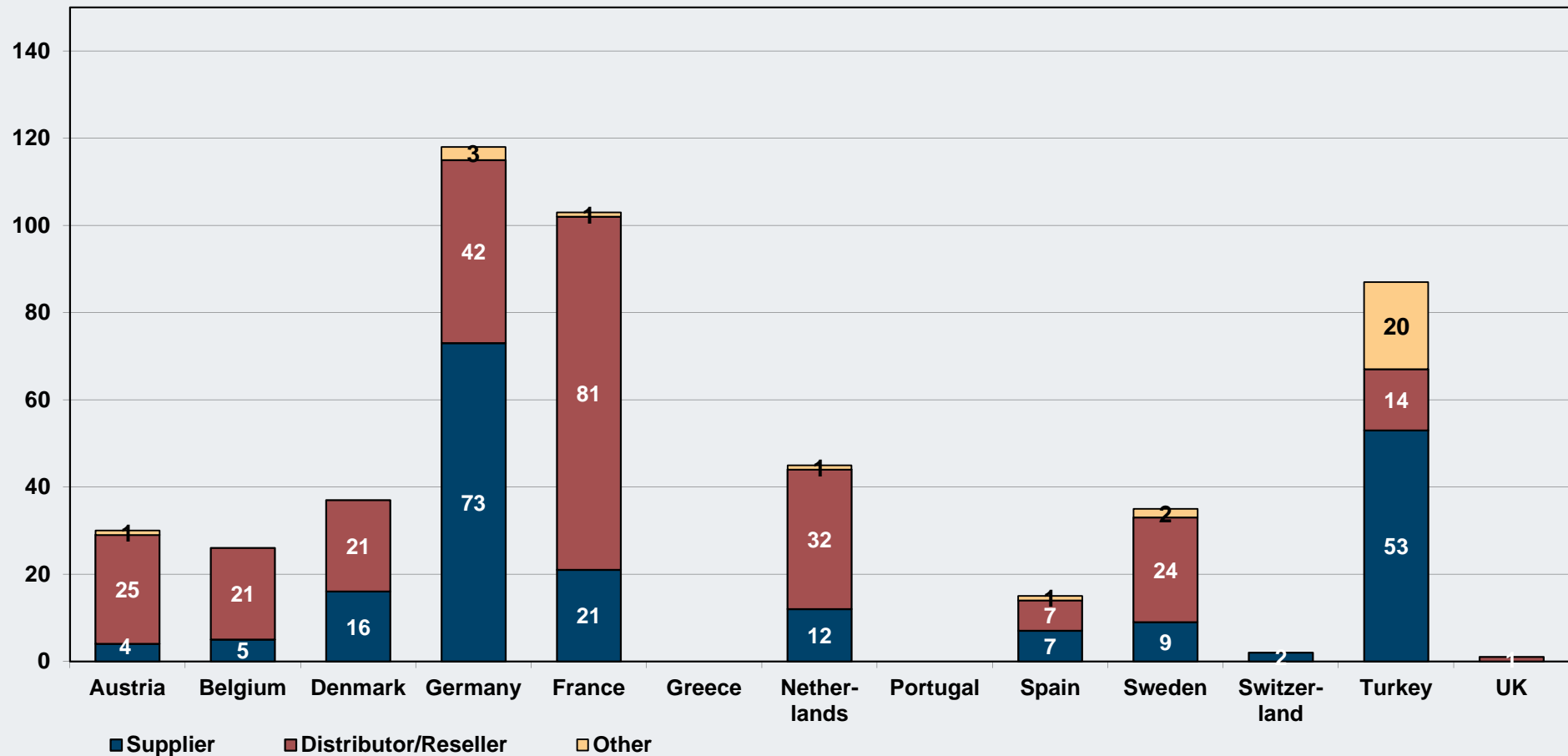
Quarterly EPPA Business Survey Q II 2012

carried out by the Institute for Research in Retailing (IFH)
at the University of Cologne



Size (number of participants) and structure of the sample: Type of business (Supplier, Distributor/Reseller, Other)

Explanatory notes: The pan-european comparisons are categorized by the type of the firm (supplier vs. distributor/reseller). The minimum sample-size of a category-country-combination (e.g. number of german suppliers in the sample) to be shown in the following graphs is ten.



1. COMPANY CHARACTERISTICS

2. TURNOVER DEVELOPMENTS (TOTAL SALES)

3. BUSINESS SITUATION AND EXPECTATIONS

- PAN-EUROPEAN COMPARISON
- COUNTRY-BY-COUNTRY TIME SERIES

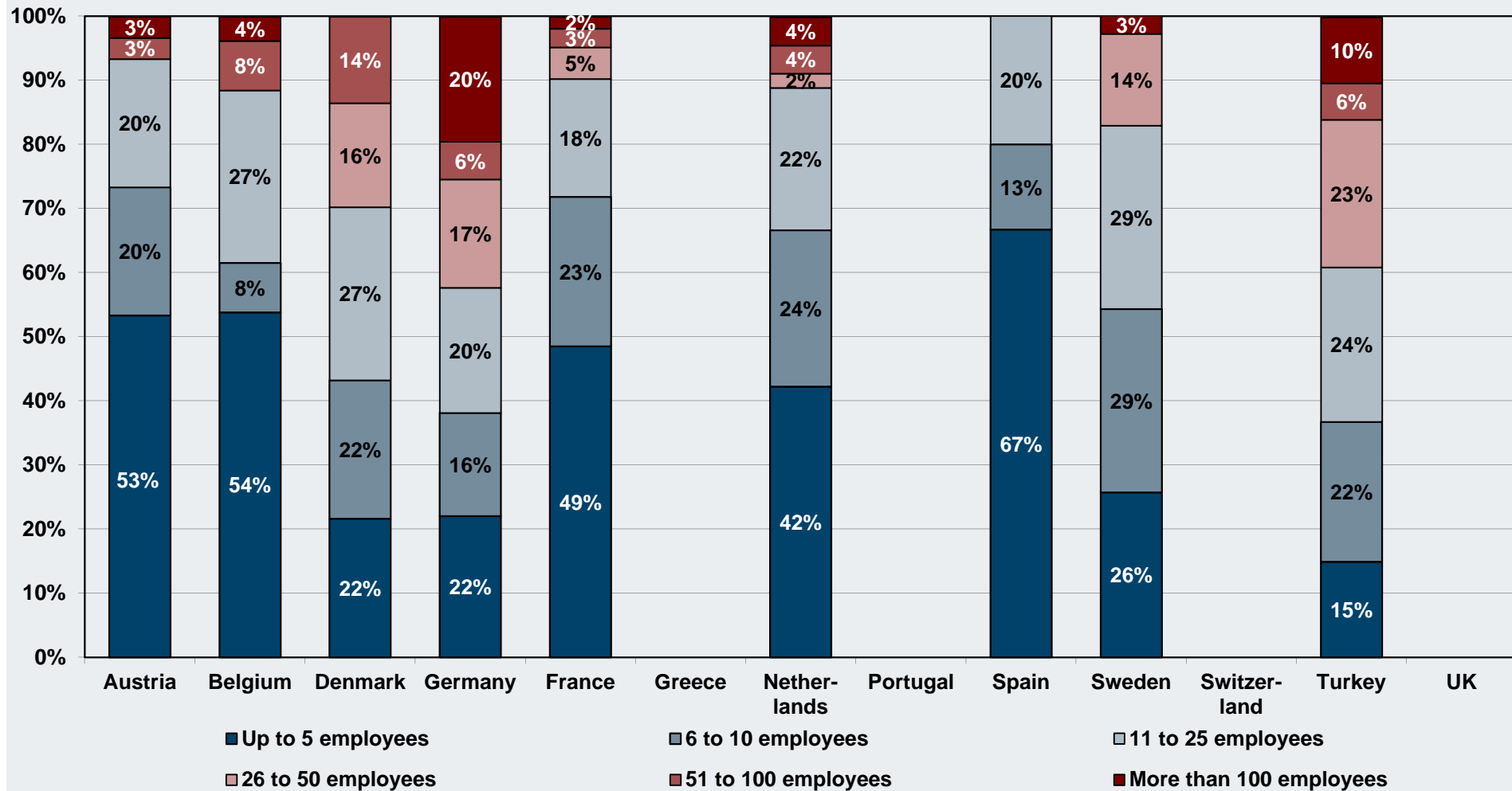
4. ADJUSTMENTS OF BUSINESS POLICY

5. QUESTION OF THE QUARTER

Company characteristics: Employees (fully employed)

All participants

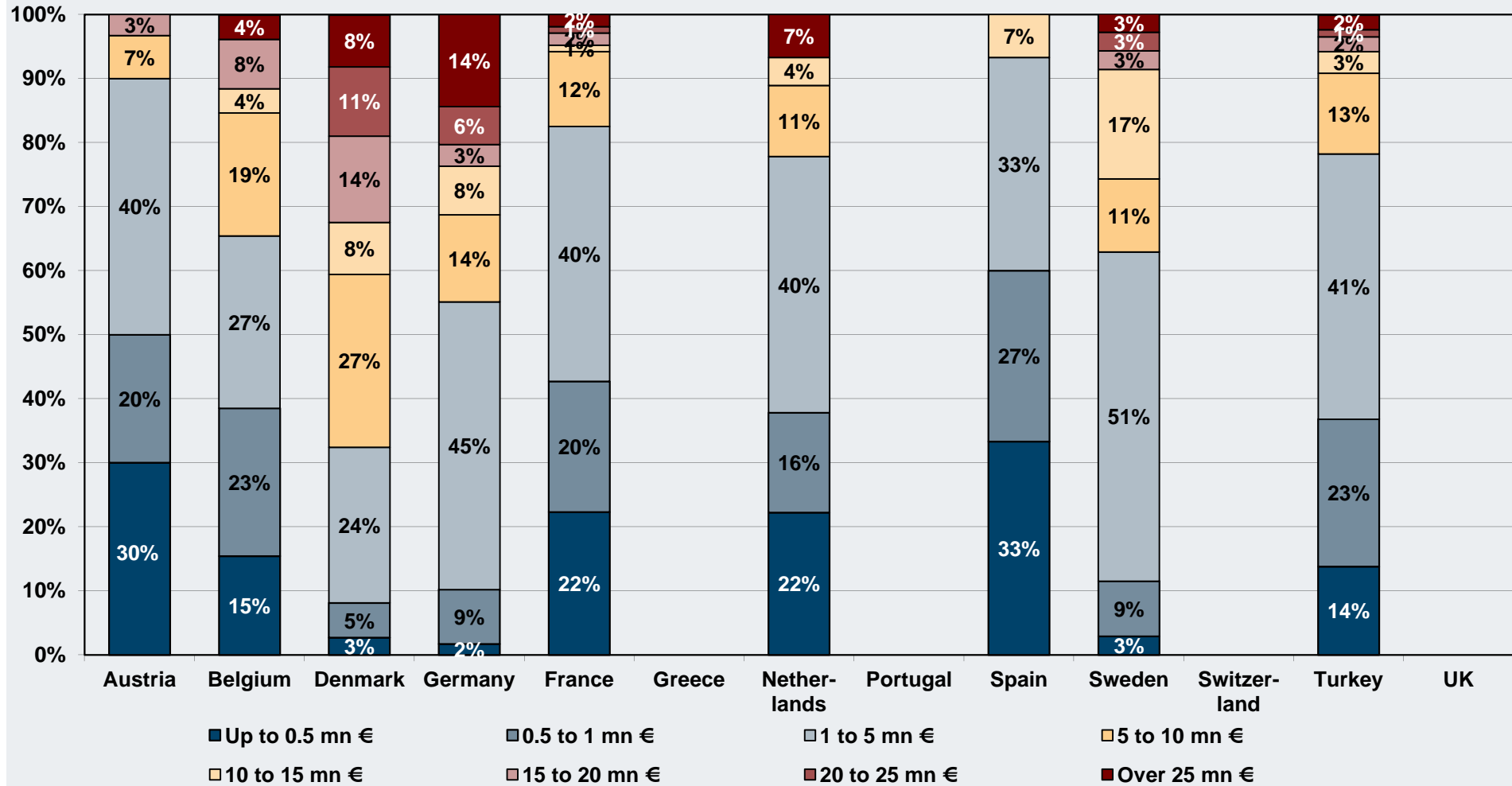
Employees (fully employed):



Company characteristics: Net turnover

All participants

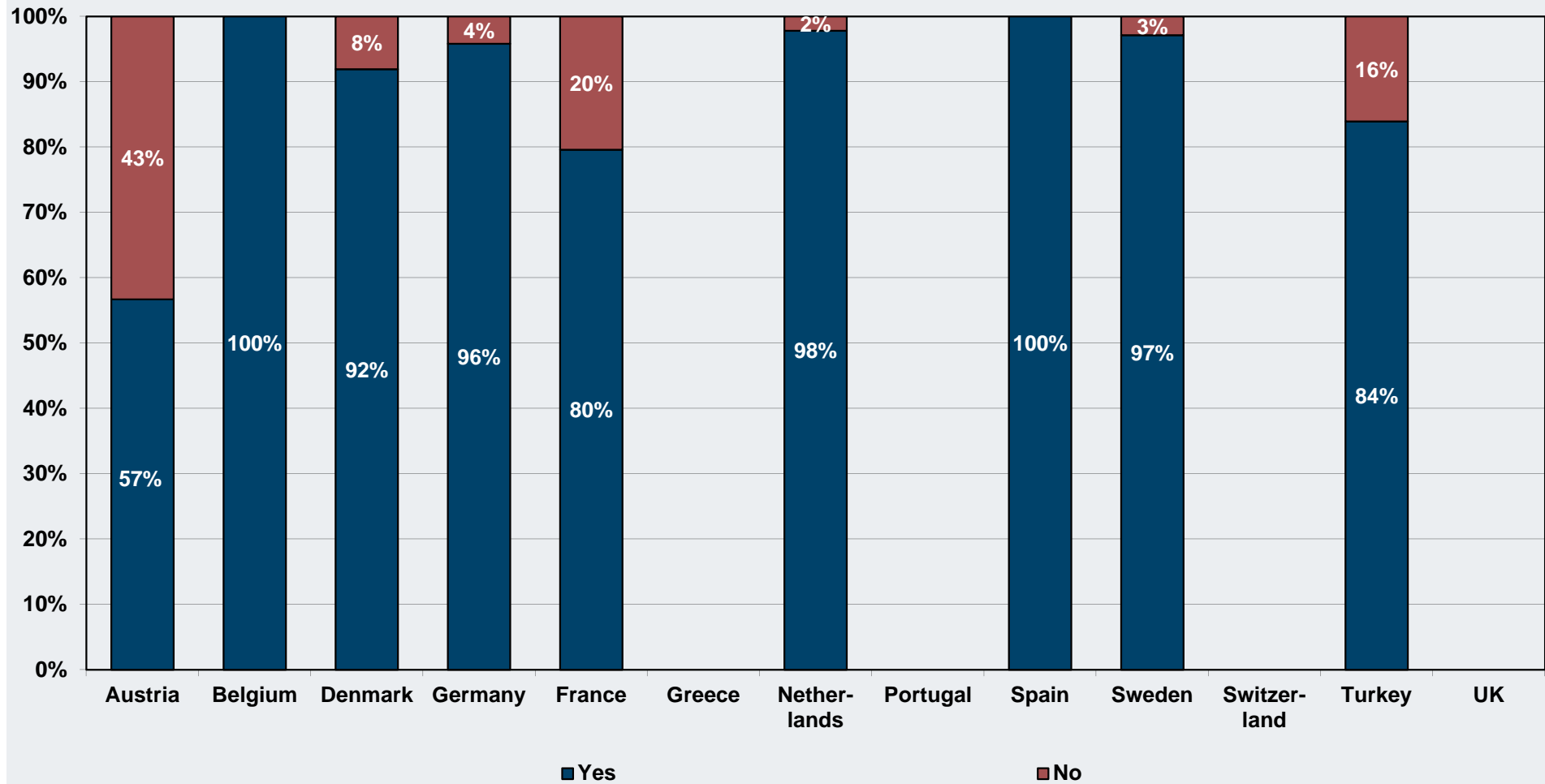
Net turnover:



Company characteristics: Membership of national trade association

All participants

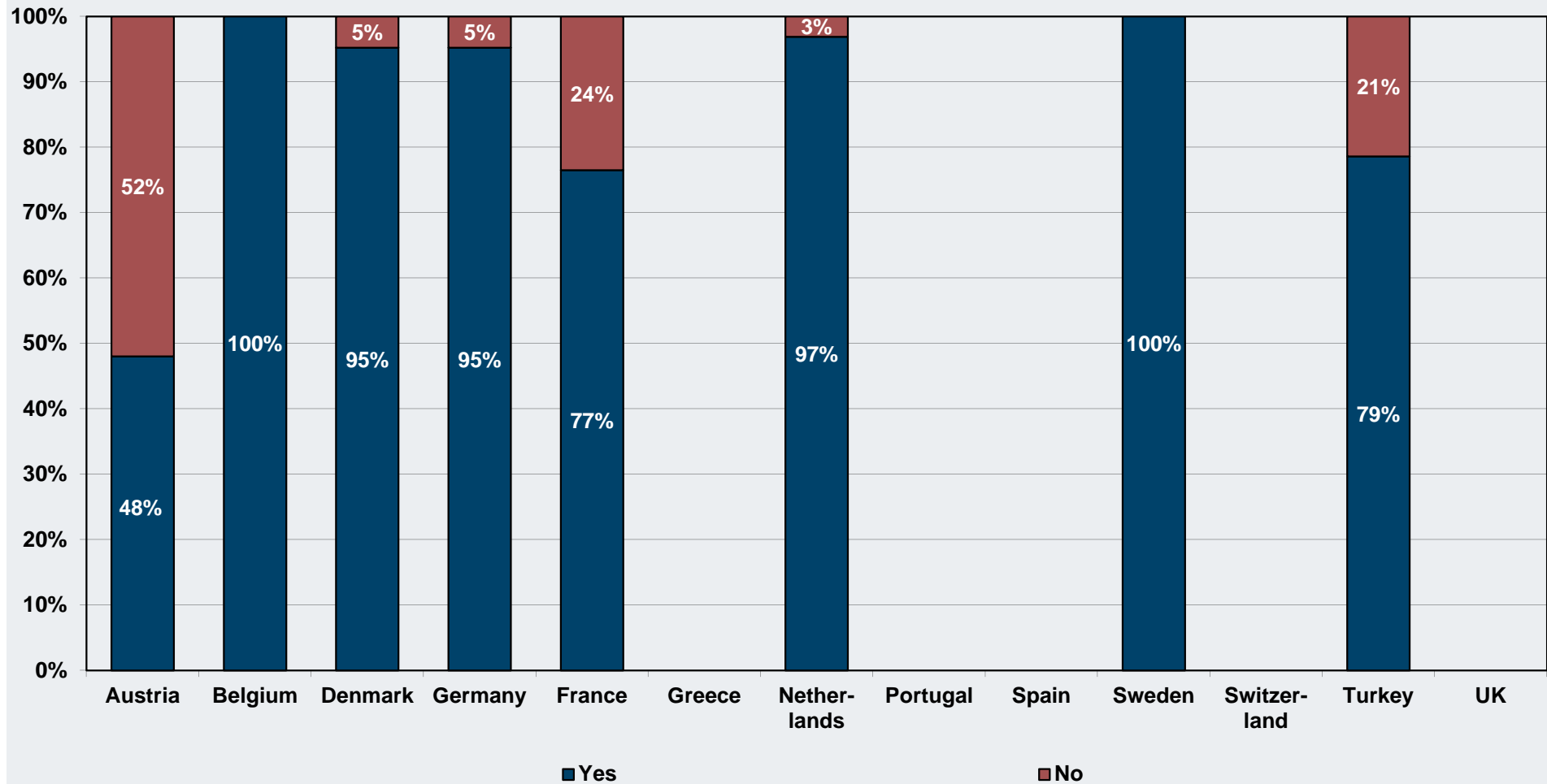
Are you a member of your national trade association?



Company characteristics: Membership of national trade association

Distributor/Reseller

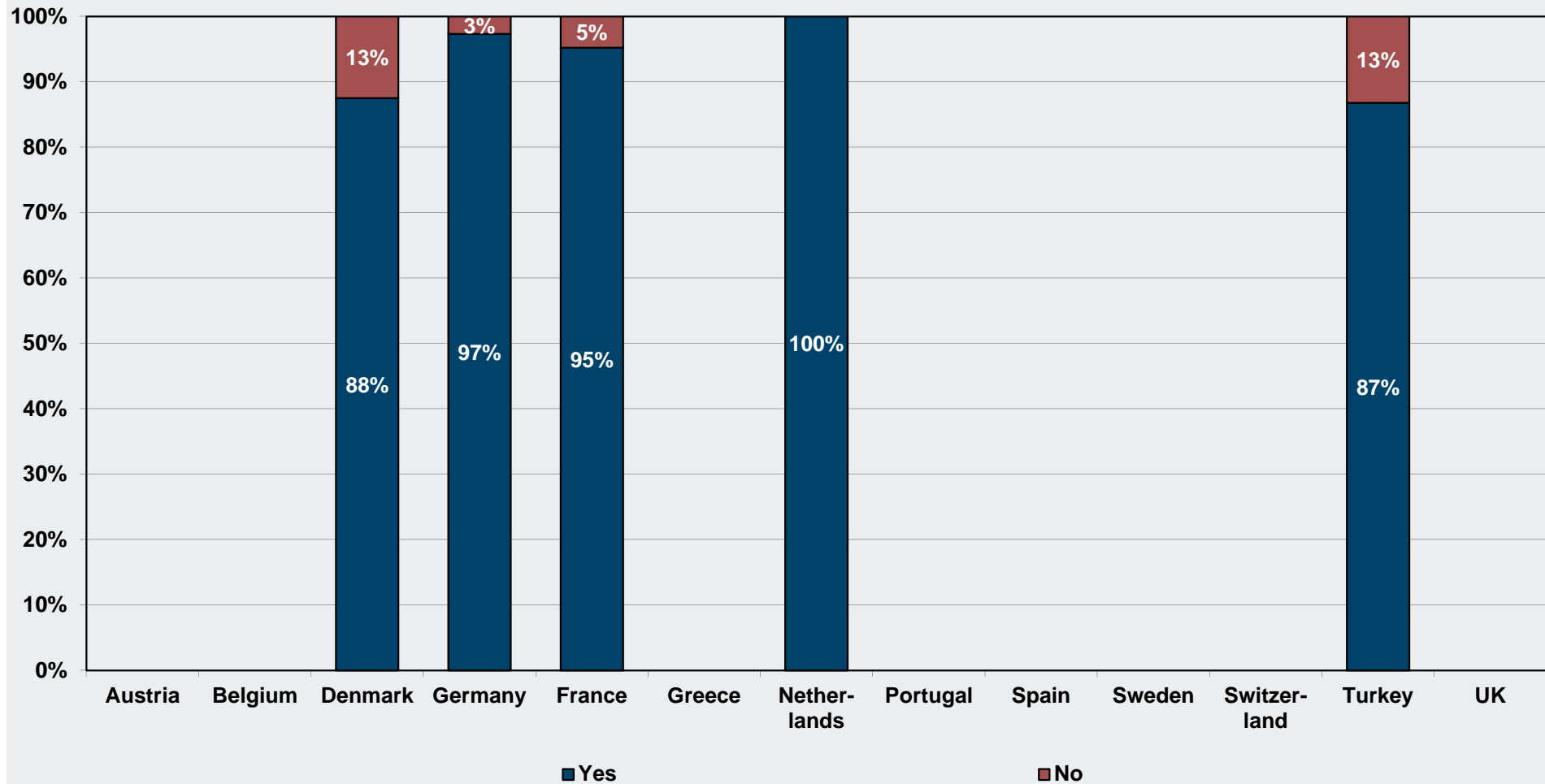
Are you a member of your national trade association?



Company characteristics: Membership of national trade association

Supplier

Are you a member of your national trade association?



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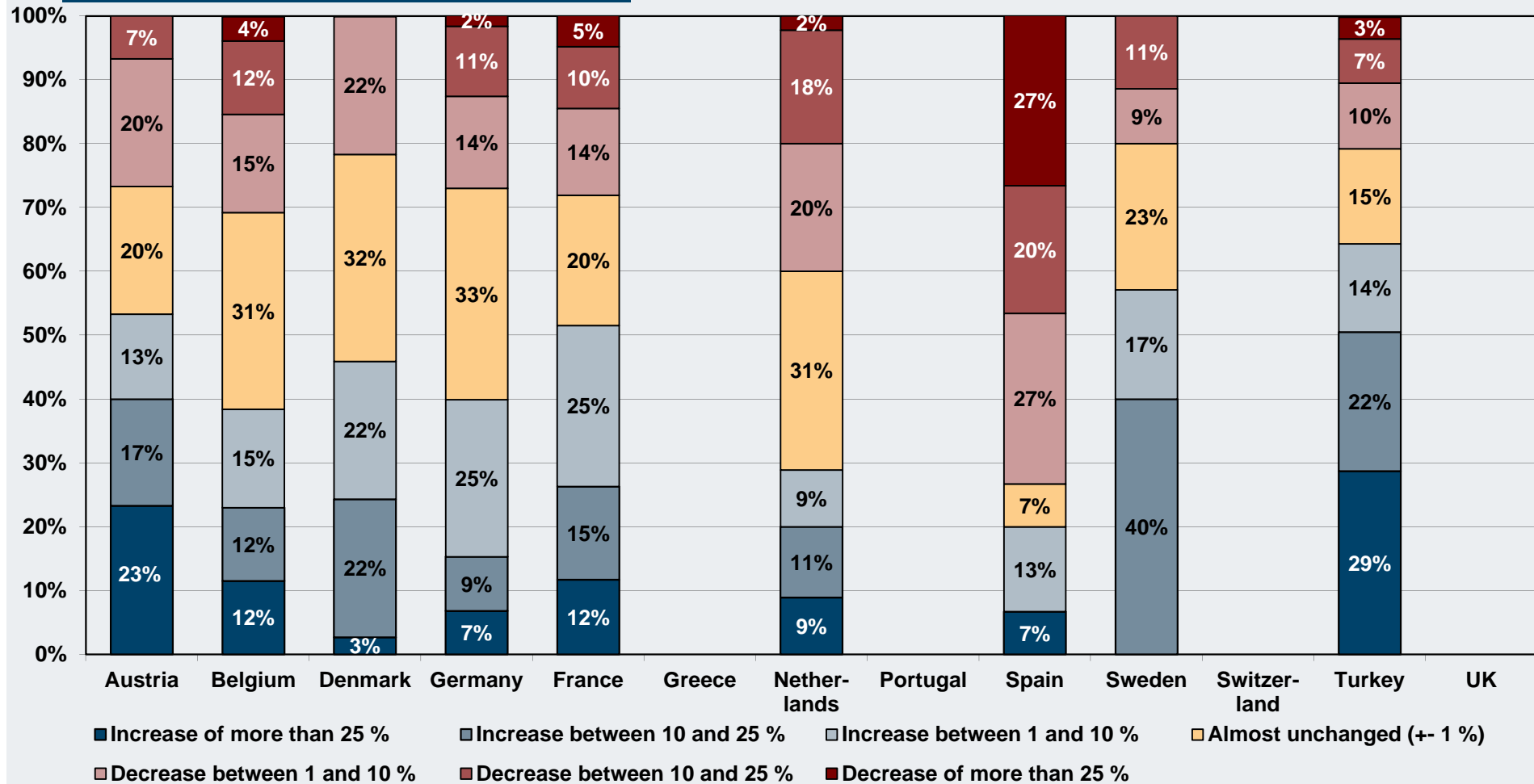
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Turnover developments (Total sales)

All participants

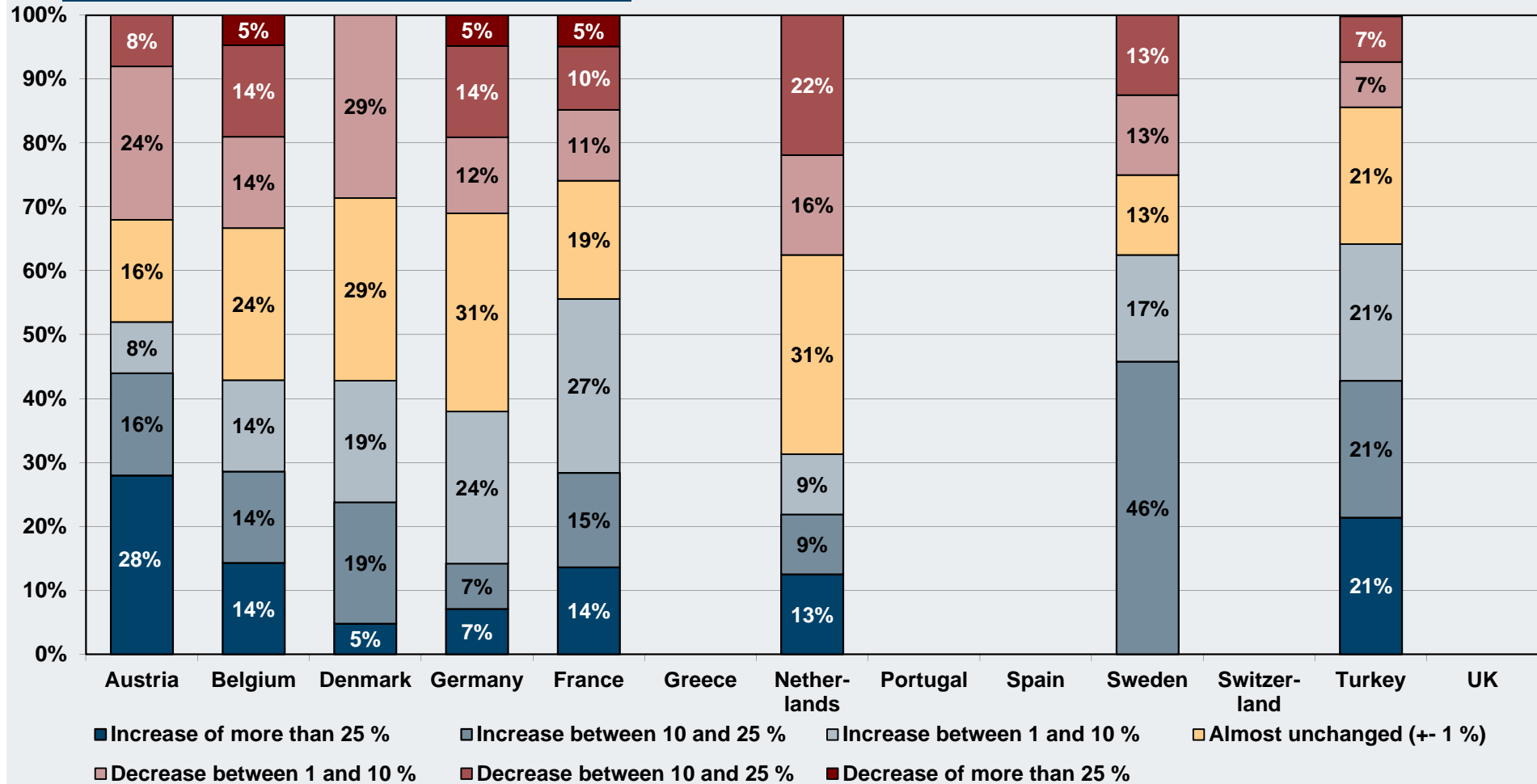
Turnover developments: How did your company turnover (total Sales) comparing the second quarter 2012 to the second quarter 2011?



Turnover developments (Total sales)

Distributor/Reseller

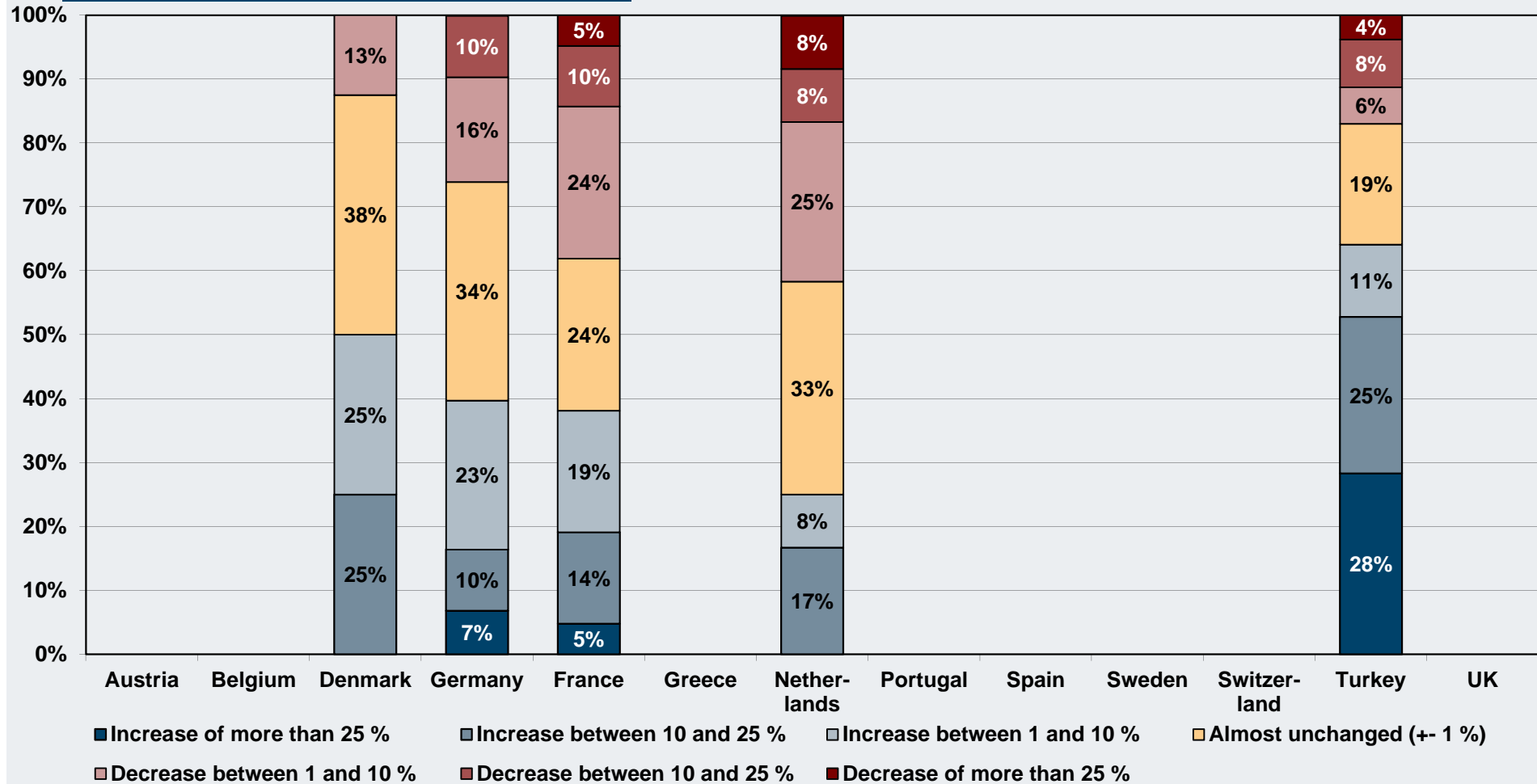
Turnover developments: How did your company turnover (total Sales) comparing the second quarter 2012 to the second quarter 2011?



Turnover developments (Total sales)

Supplier

Turnover developments: How did your company turnover (total Sales) comparing the second quarter 2012 to the second quarter 2011?



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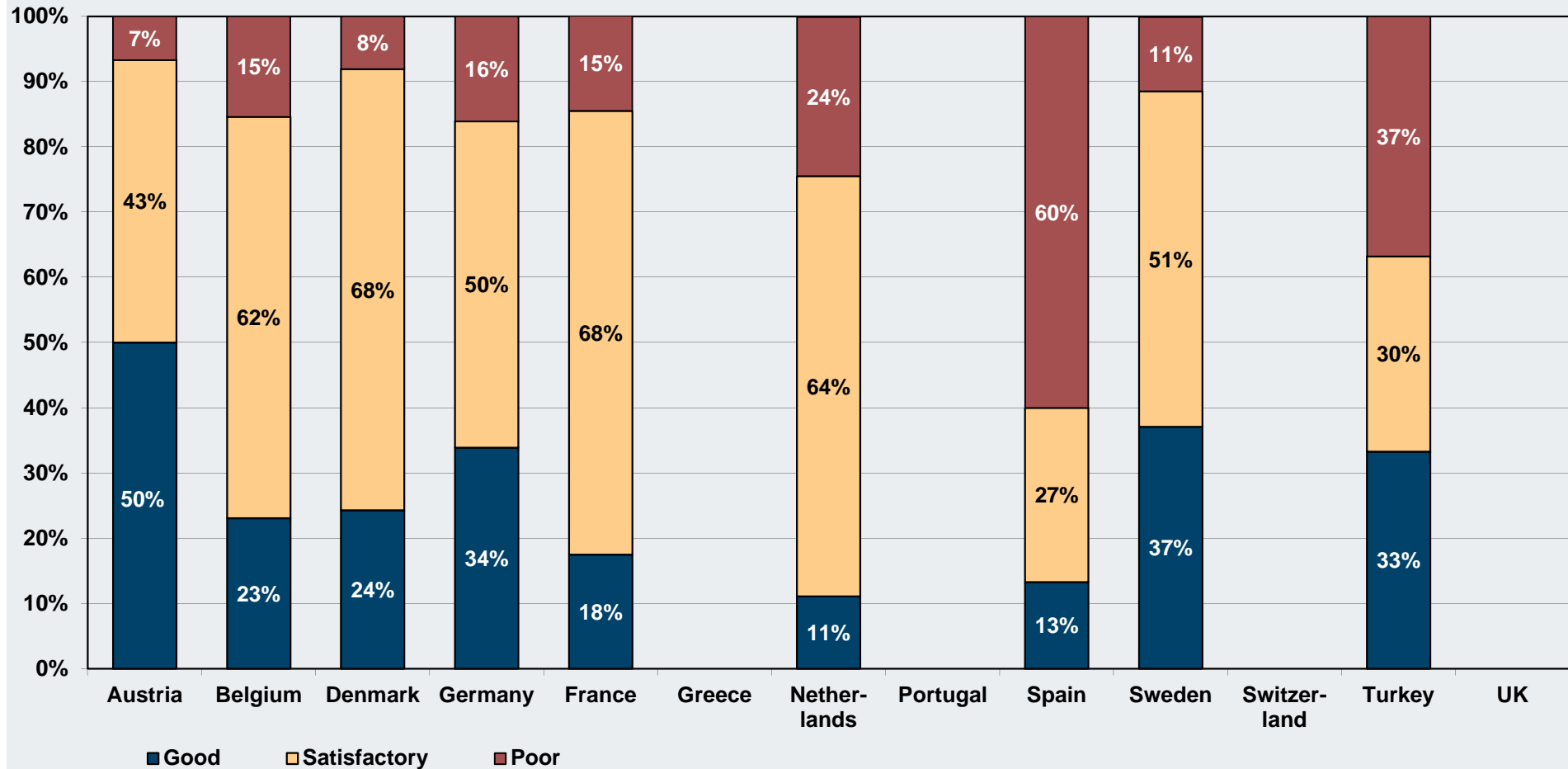
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Business situation

All participants

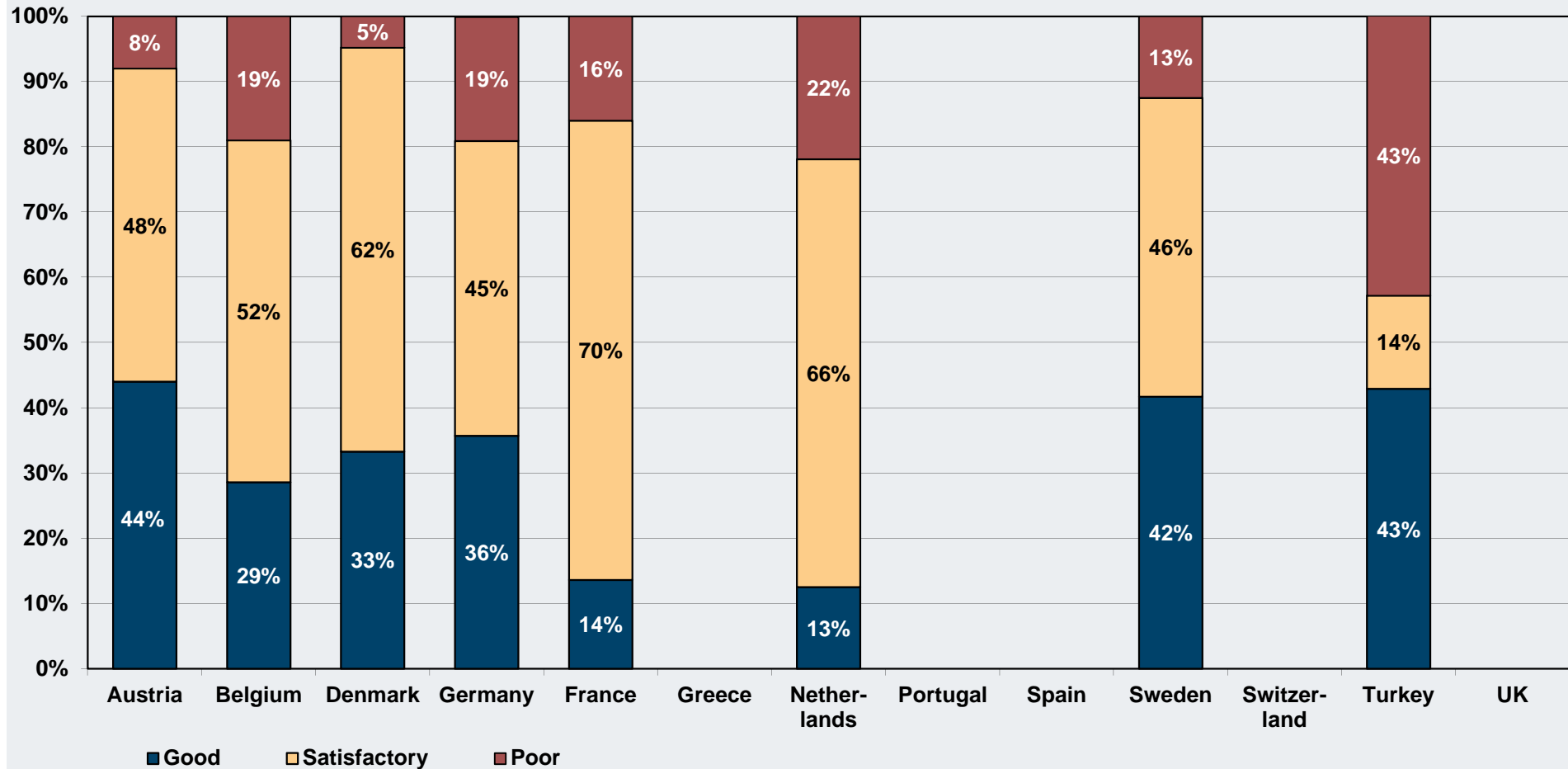
Business situation: How does your company see its present business situation?



Business situation

Distributor/Reseller

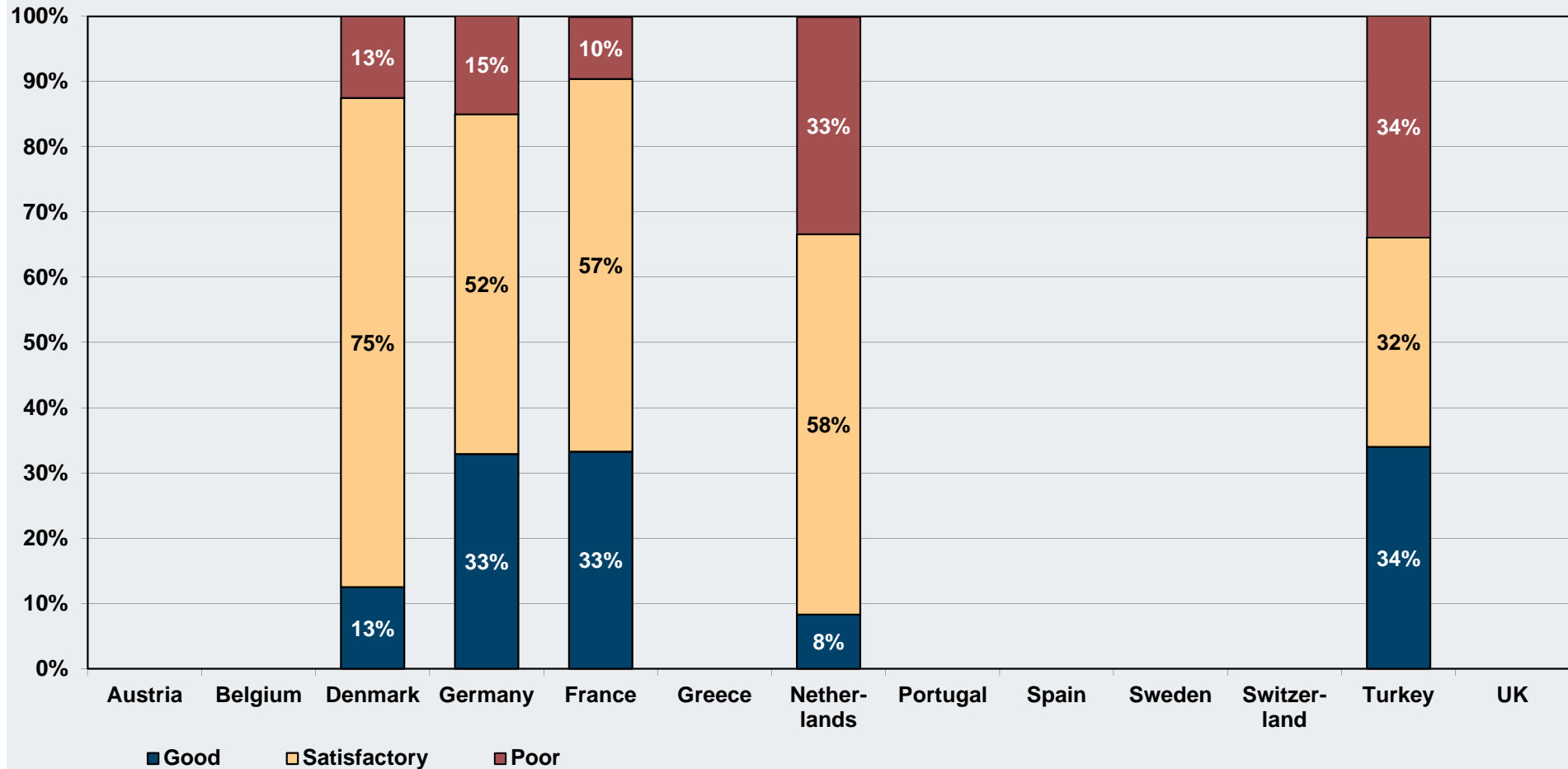
Business situation: How does your company see its present business situation?



Business situation

Supplier

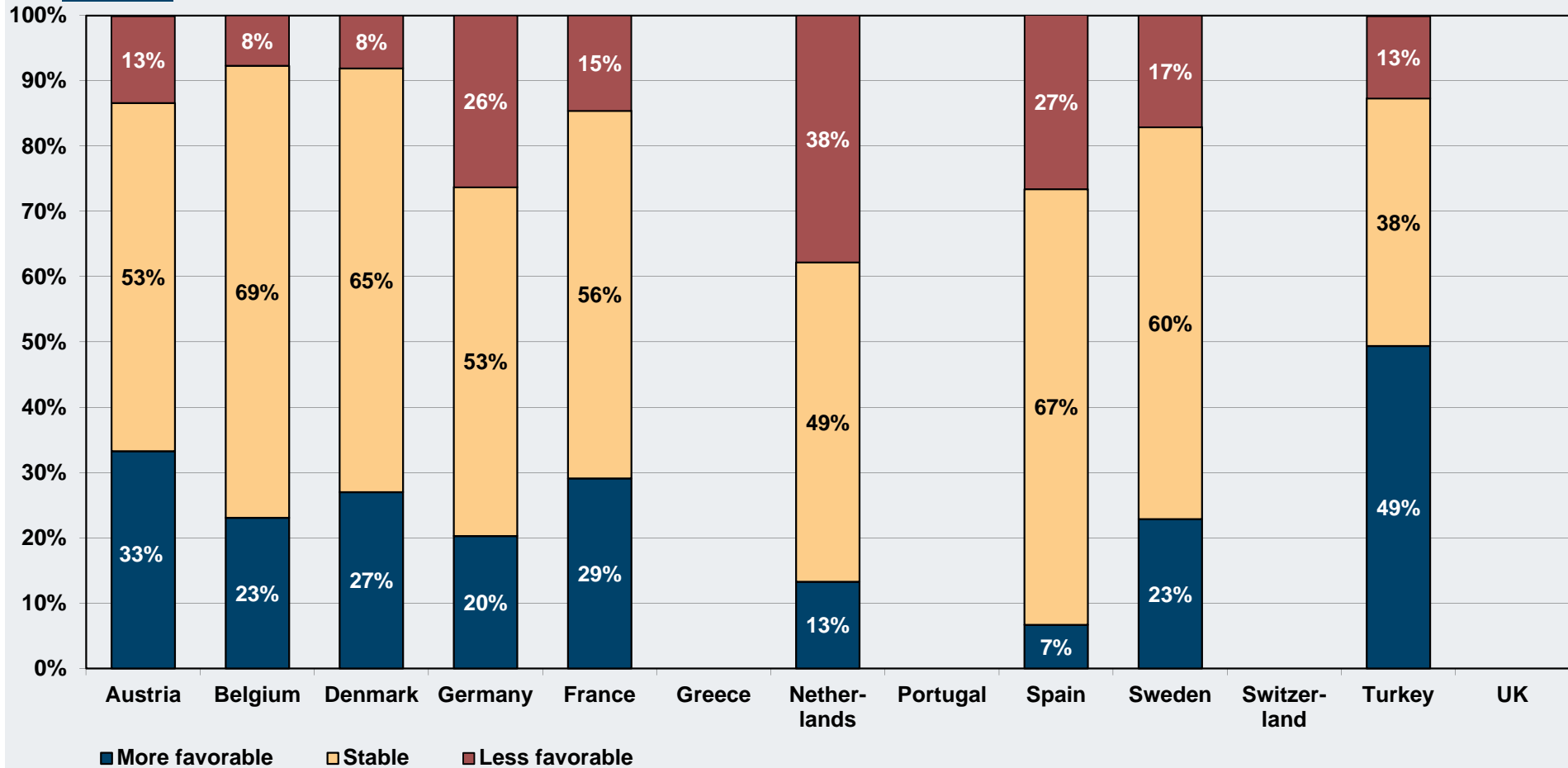
Business situation: How does your company see its present business situation?



Business expectations

All participants

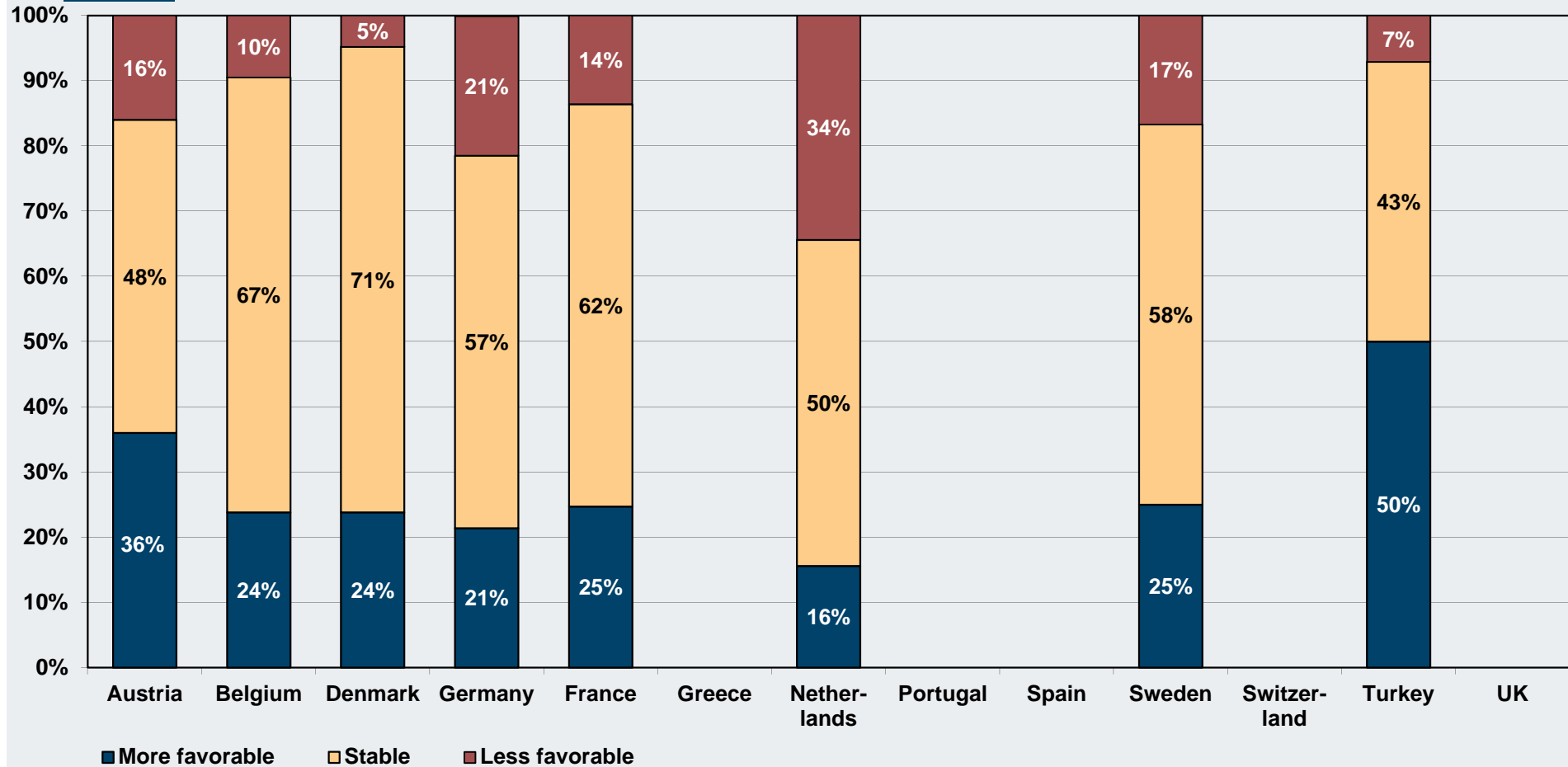
Business expectations: How does your company expect its situation to change over the next six months?



Business expectations

Distributor/Reseller

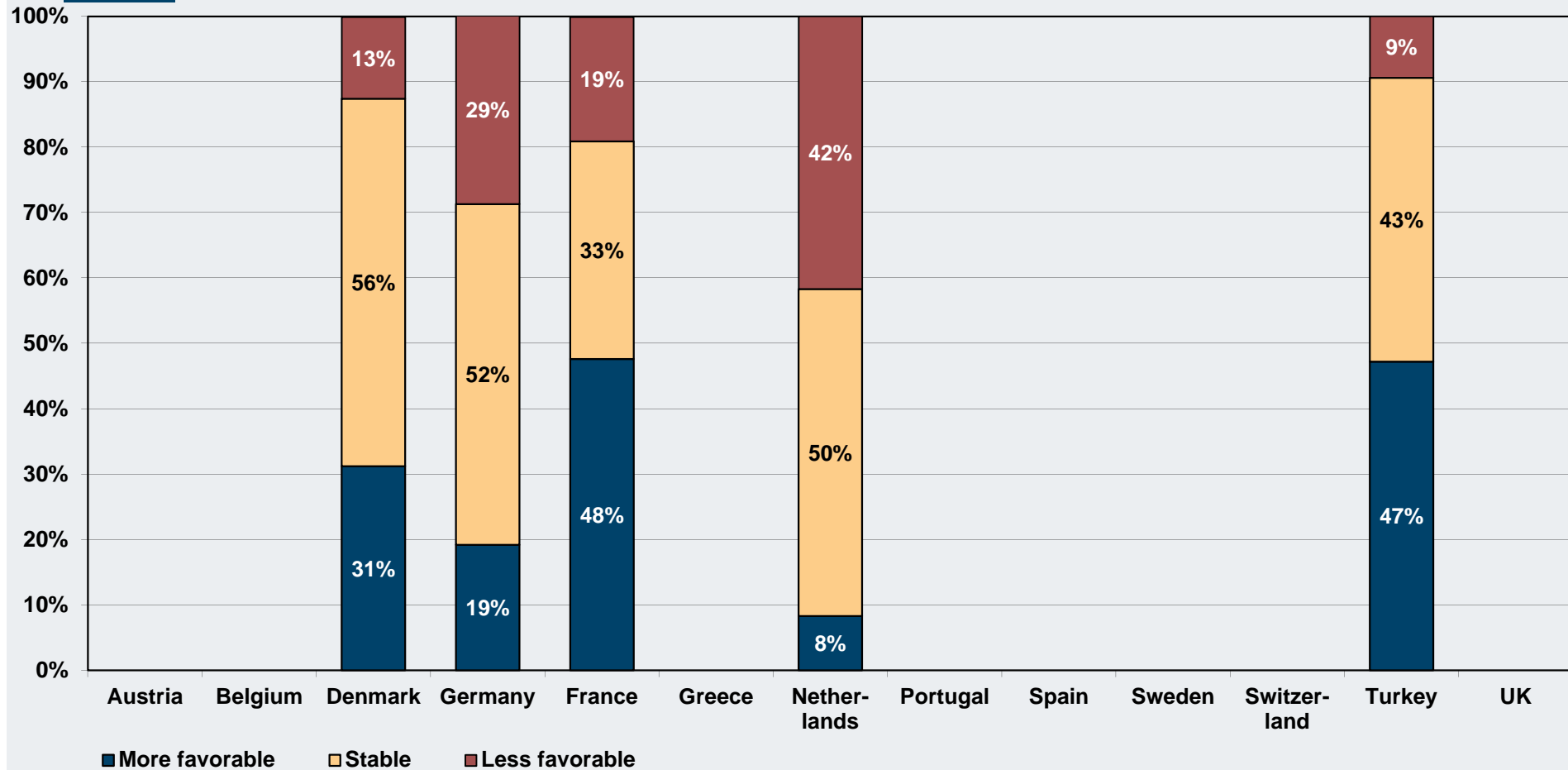
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Business expectations

Supplier

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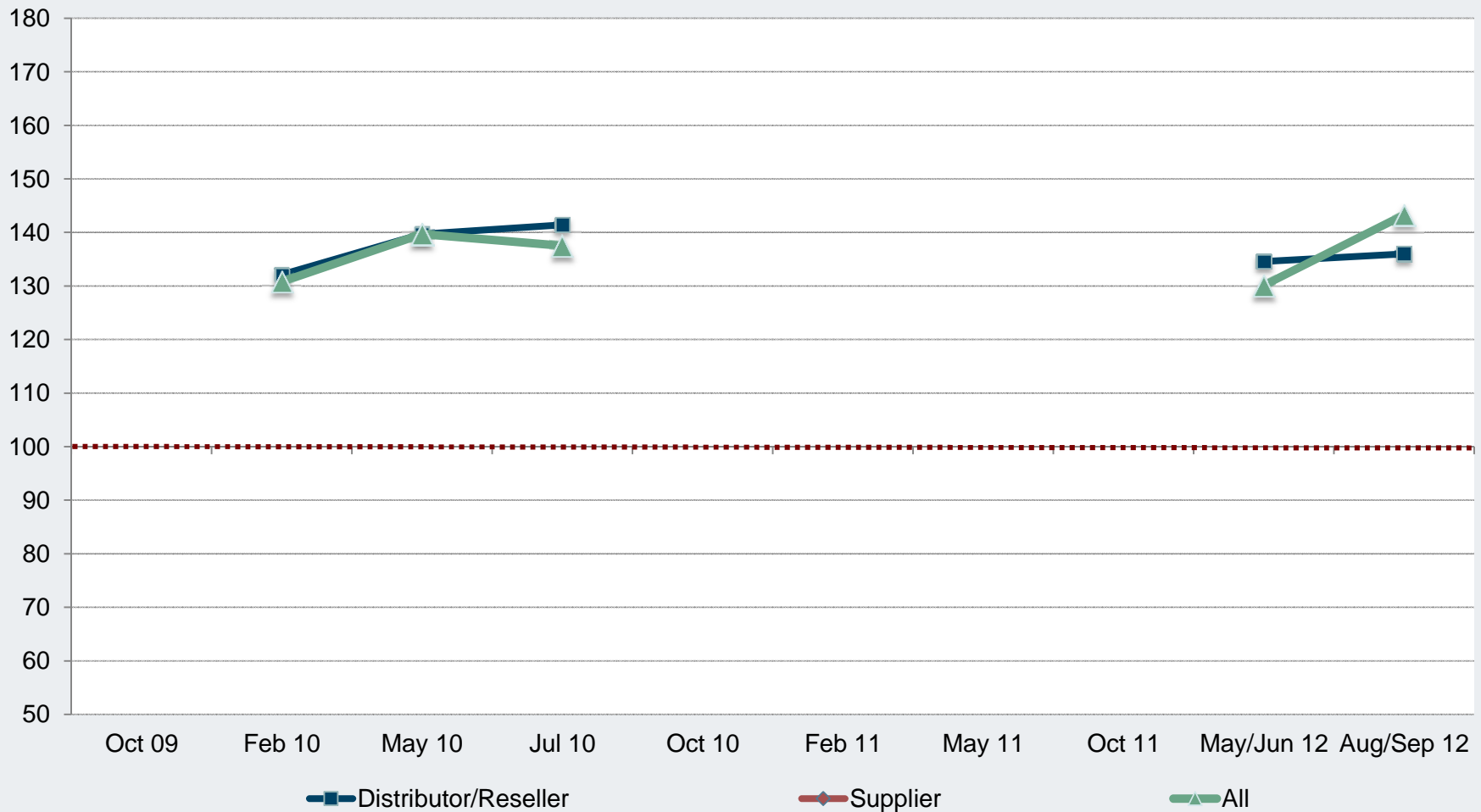
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Austria

Business situation

Time series Austria

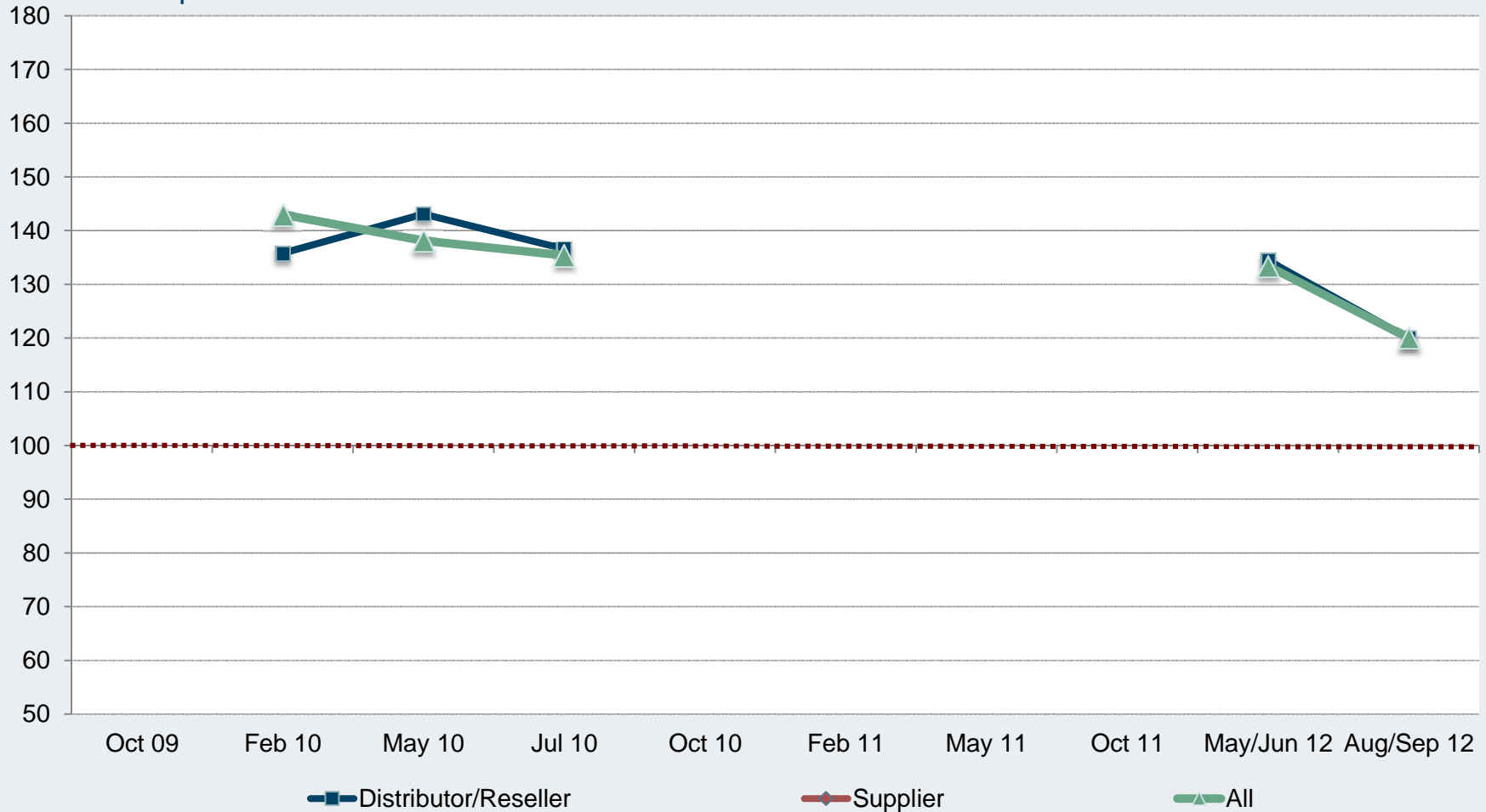
Business situation: Difference between positive ('Good') and negative ('Poor') evaluations plus 100



Business expectations

Time series Austria

Business expectations: Difference between positive ('More favorable') and negative ('Less favorable') evaluations plus 100

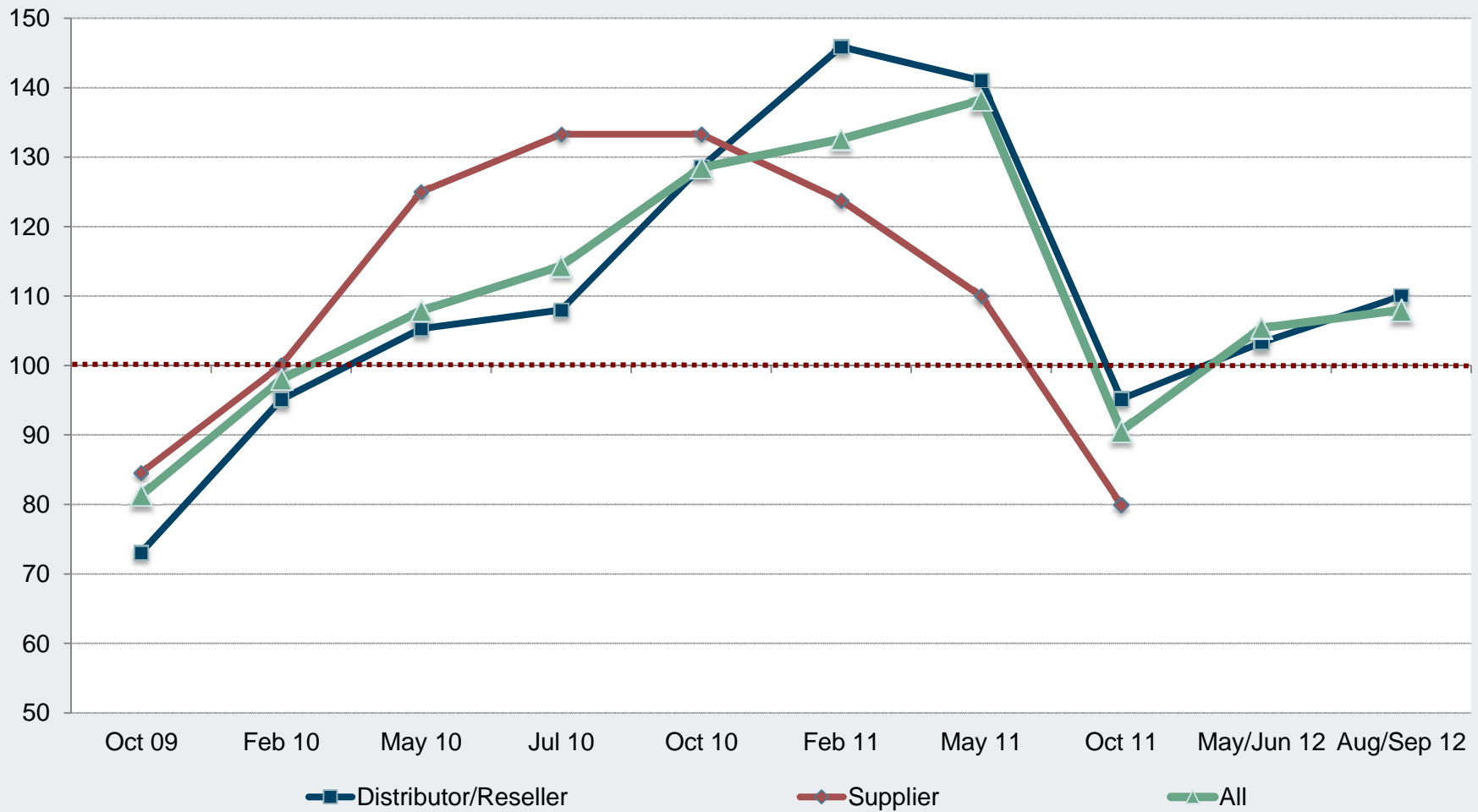


Belgium

Business situation

Time series Belgium

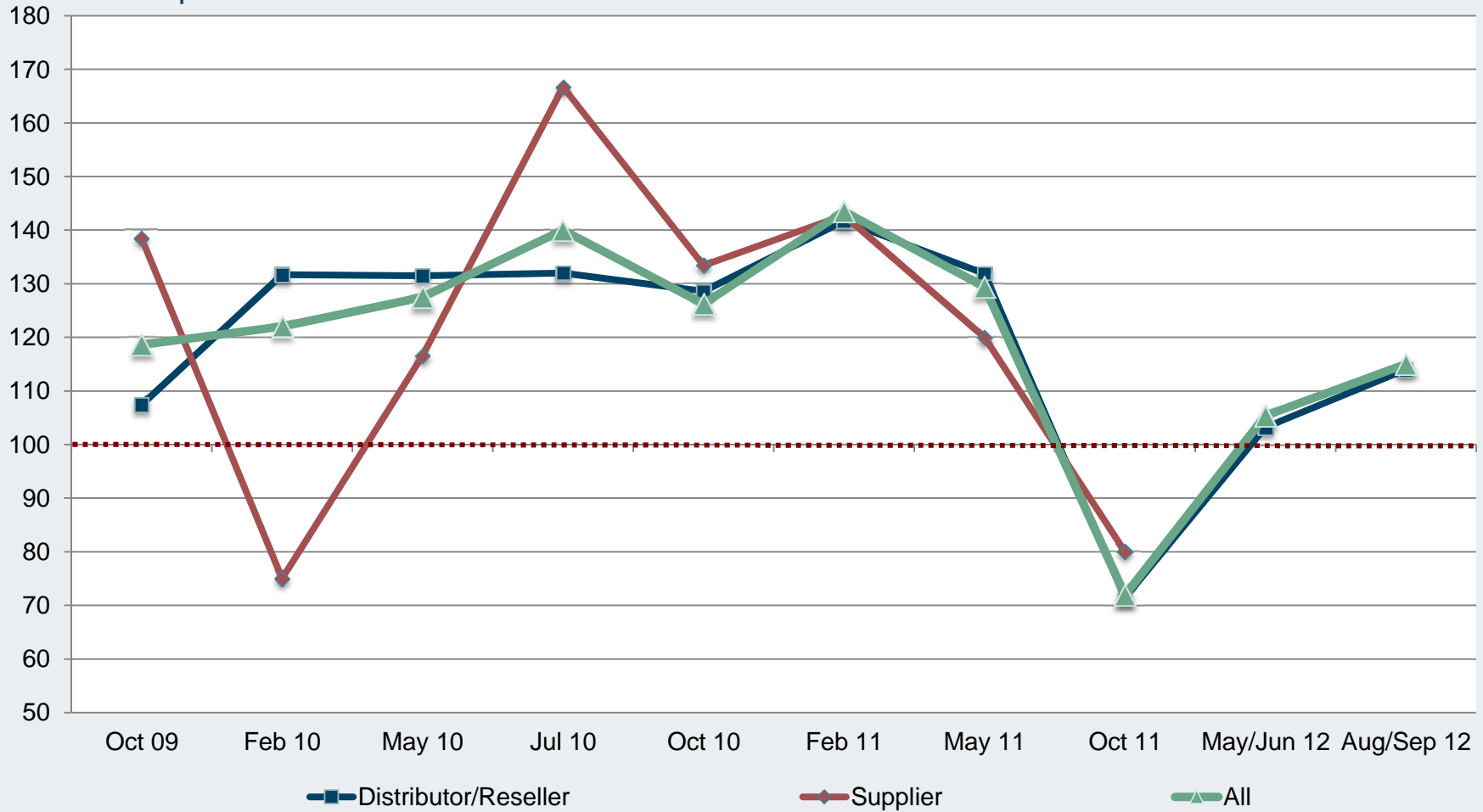
Business situation: Difference between positive ('Good') and negative ('Poor') evaluations plus 100



Business expectations

Time series Belgium

Business expectations: Difference between positive ('More favorable') and negative ('Less favorable') evaluations plus 100

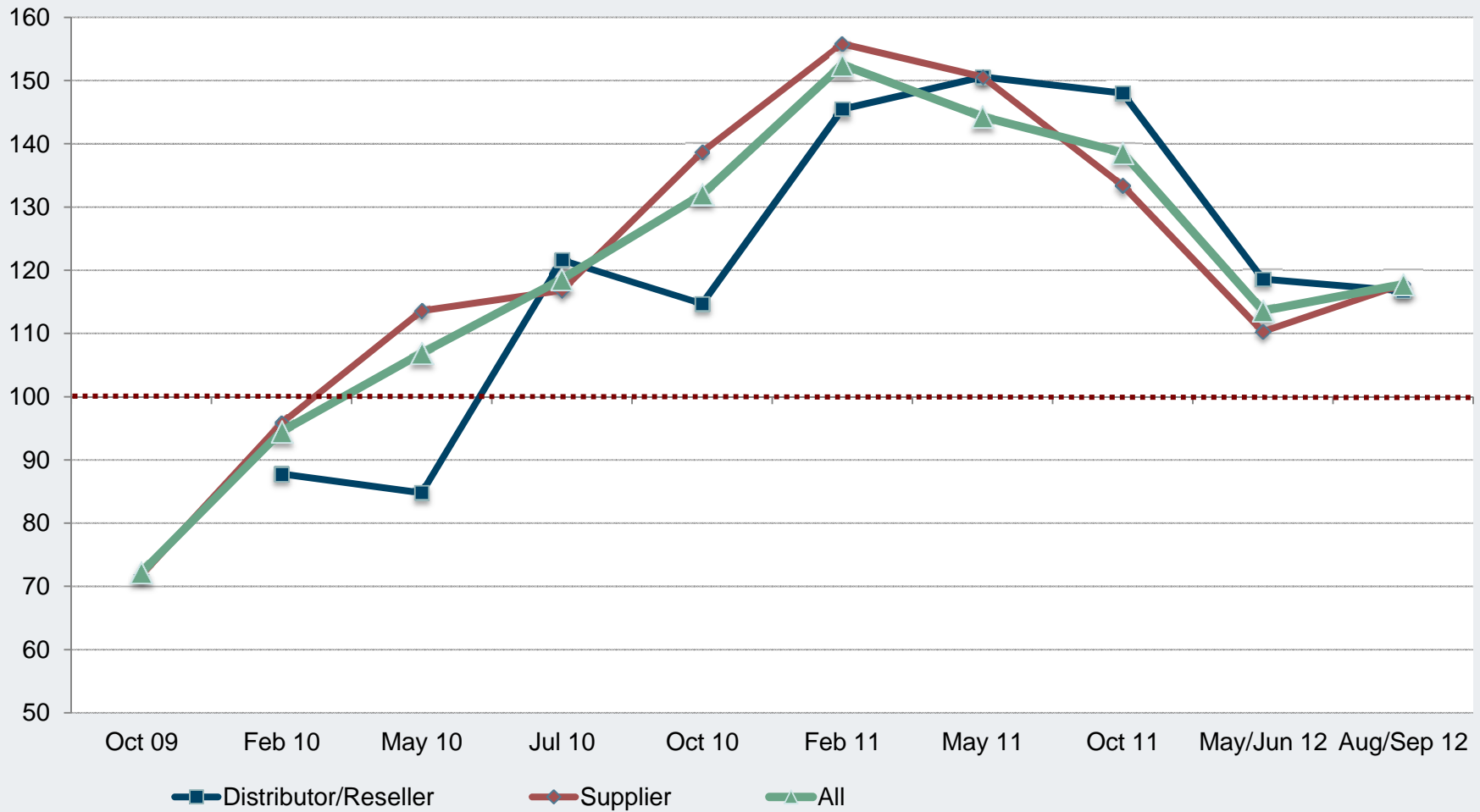


Germany

Business situation

Time series Germany

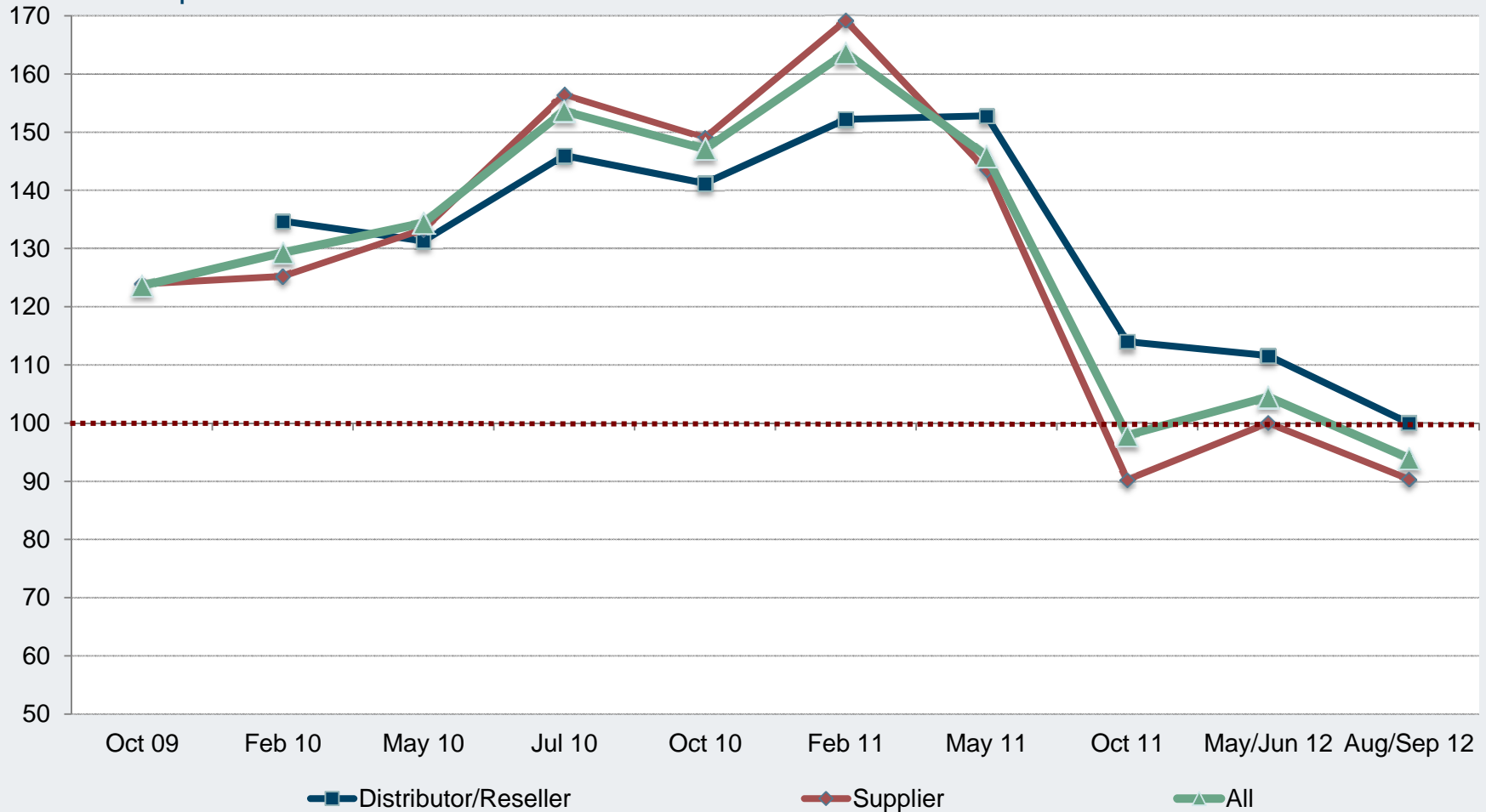
Business situation: Difference between positive ('Good') and negative ('Poor') evaluations plus 100



Business expectations

Time series Germany

Business expectations: Difference between positive ('More favorable') and negative ('Less favorable') evaluations plus 100

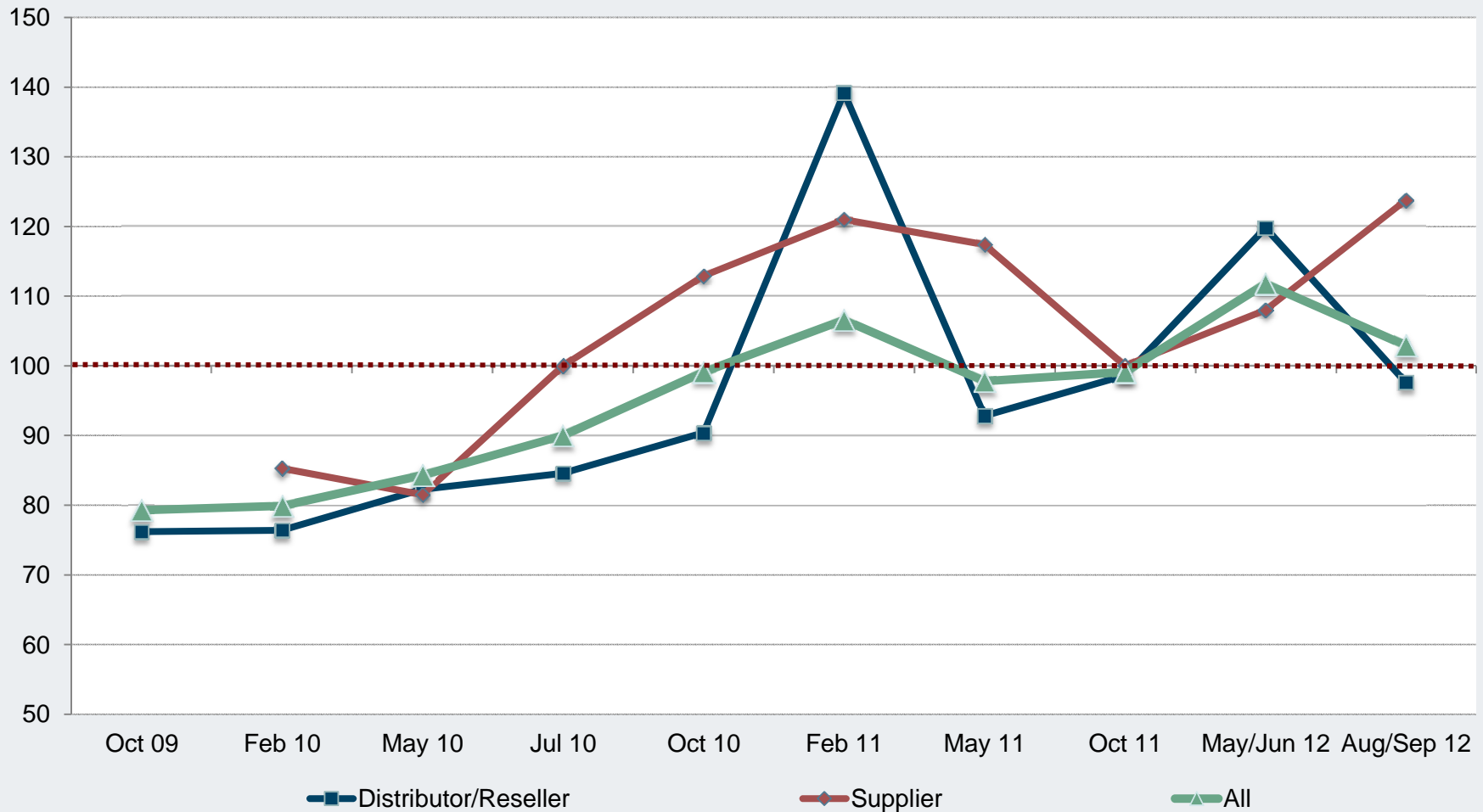


France

Business situation

Time series France

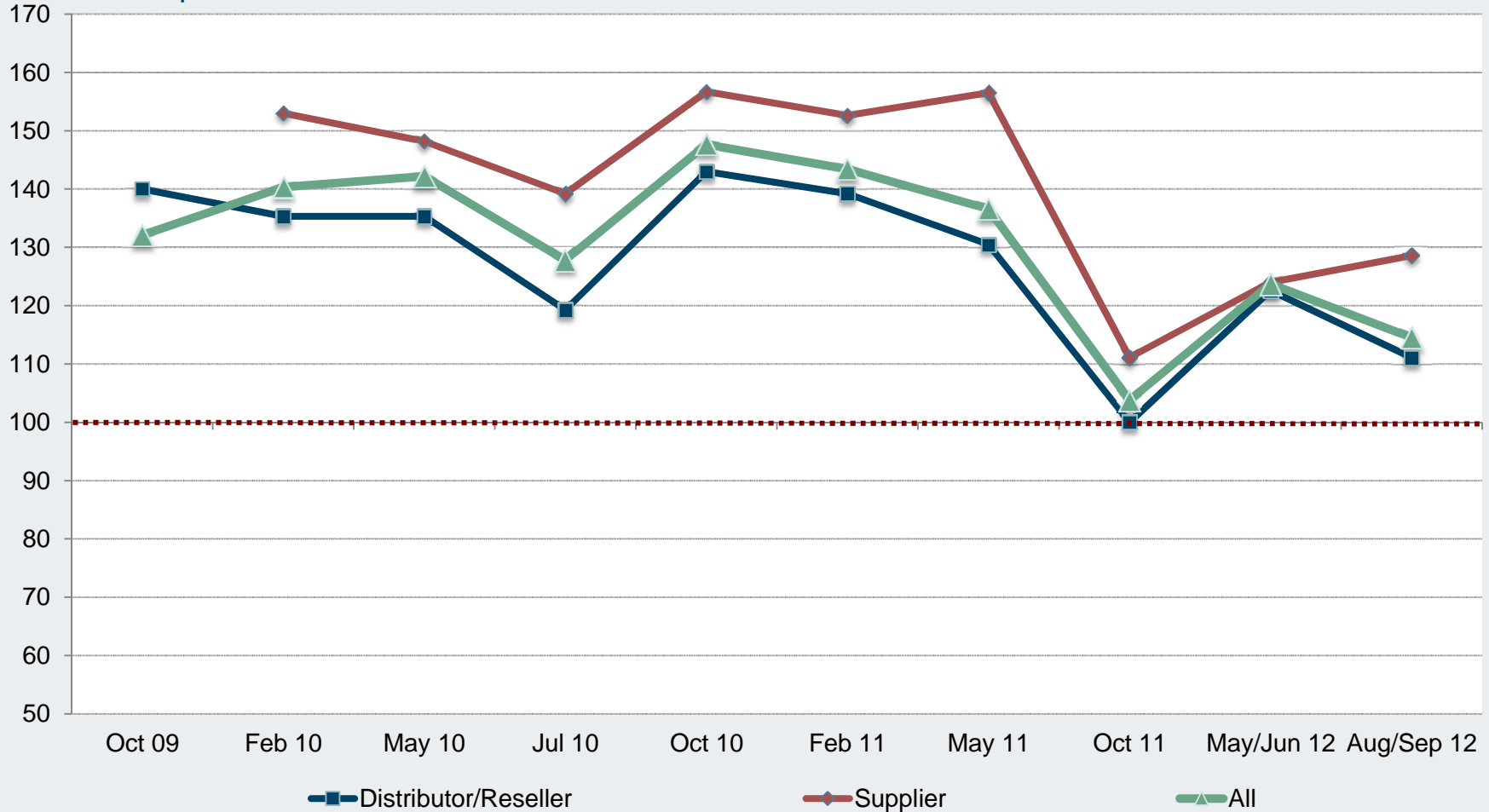
Business situation: Difference between positive ('Good') and negative ('Poor') evaluations plus 100



Business expectations

Time series France

Business expectations: Difference between positive ('More favorable') and negative ('Less favorable') evaluations plus 100

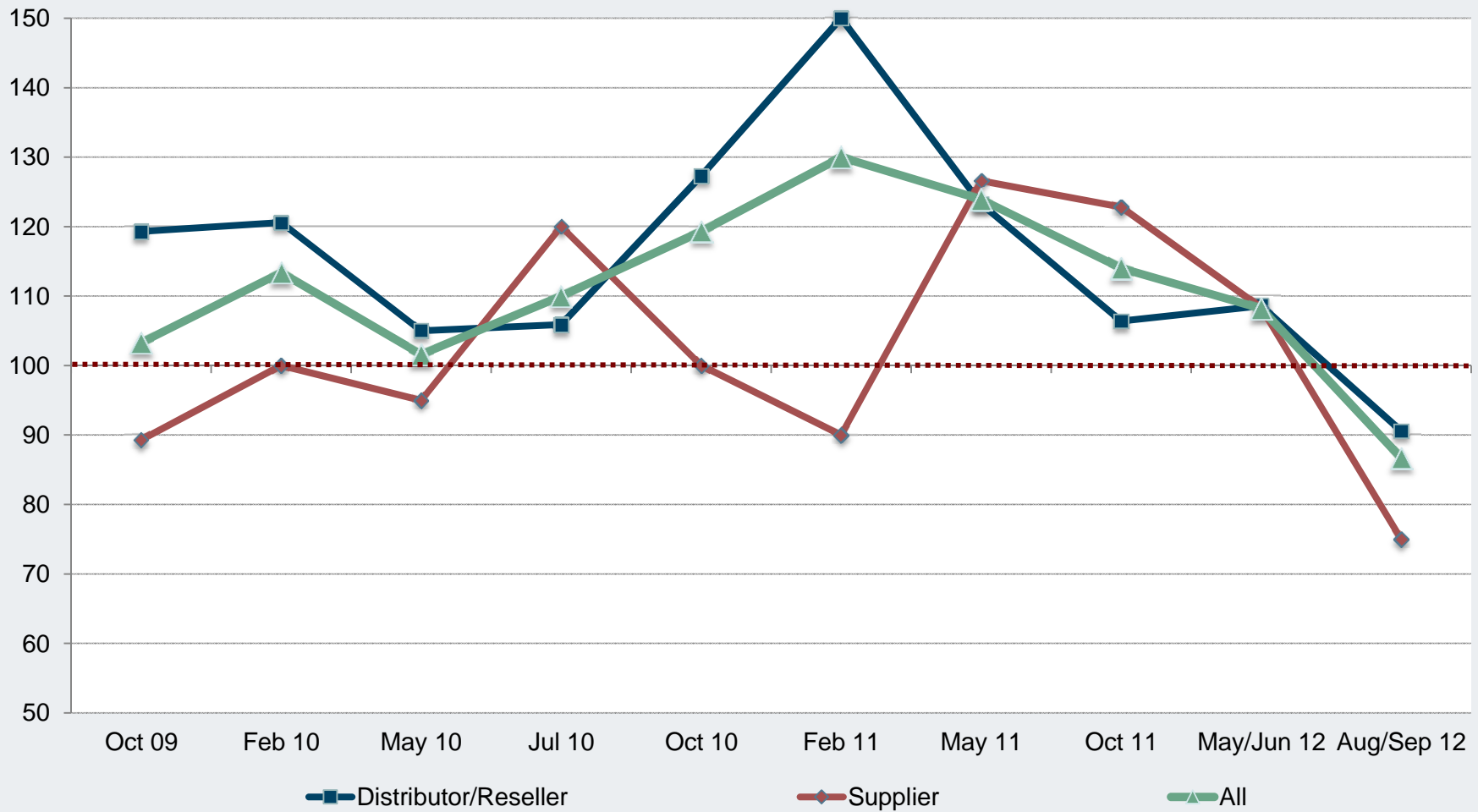


Netherlands

Business situation

Time series Netherlands

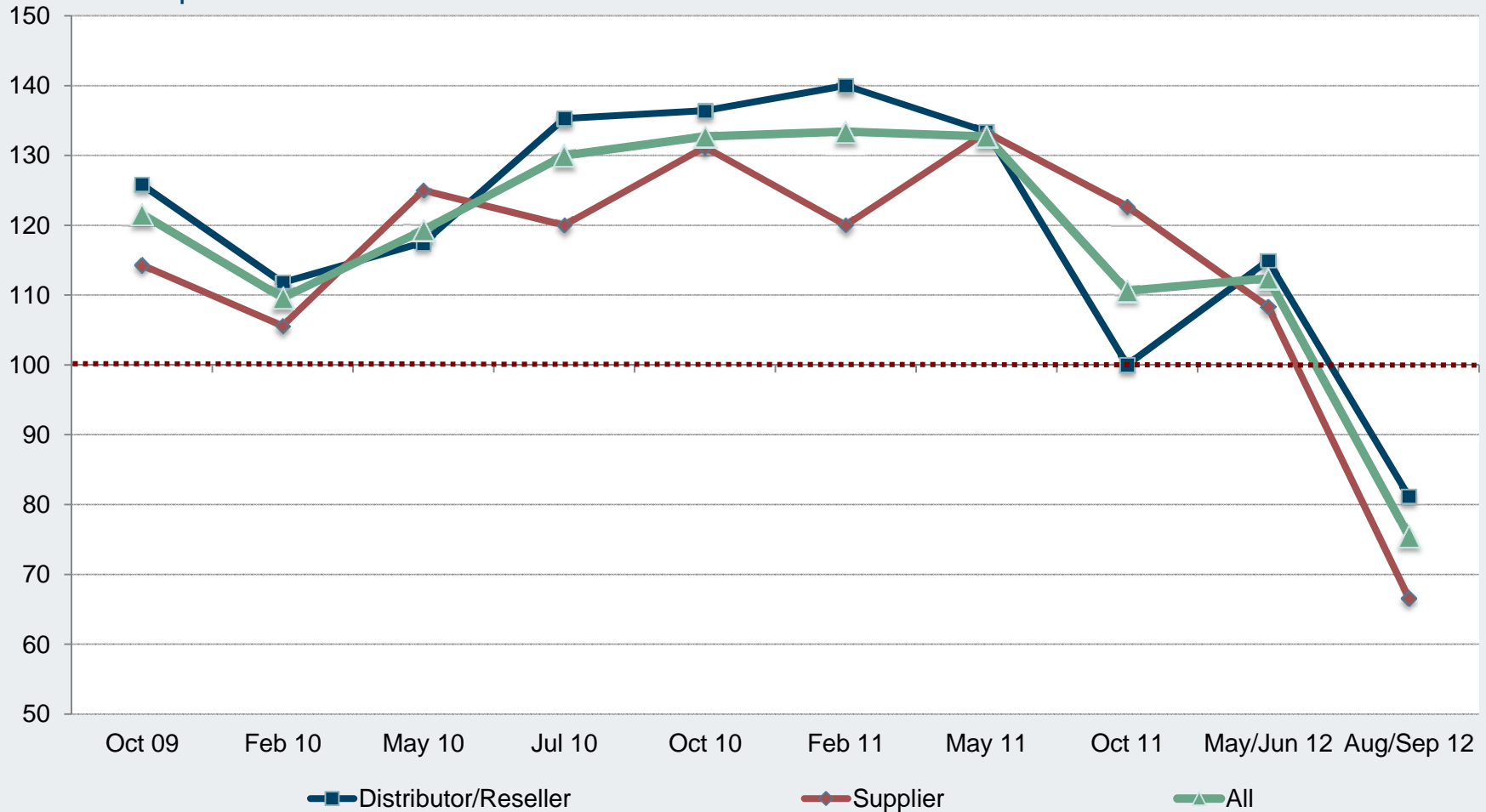
Business situation: Difference between positive ('Good') and negative ('Poor') evaluations plus 100



Business expectations

Time series Netherlands

Business expectations: Difference between positive ('More favorable') and negative ('Less favorable') evaluations plus 100

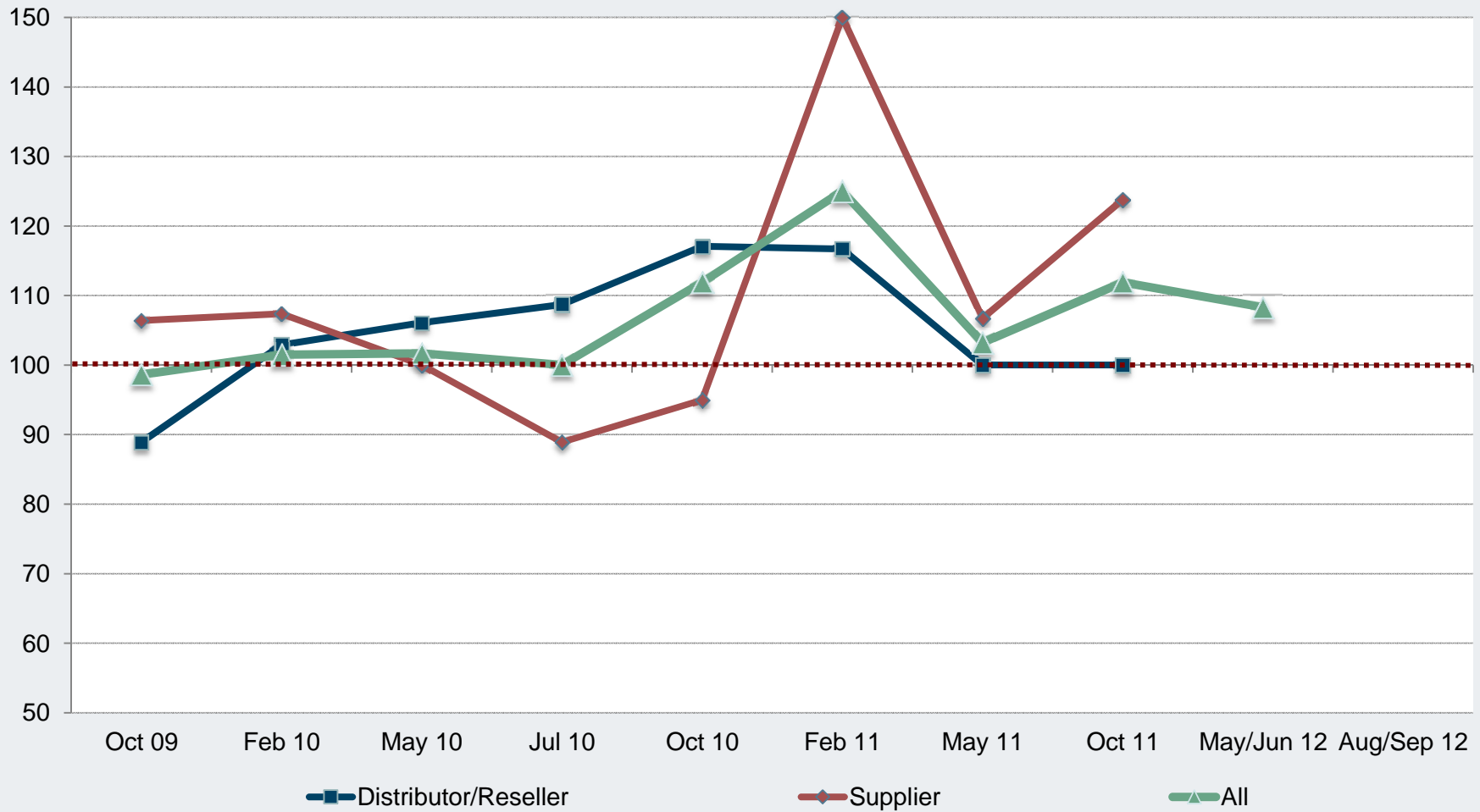


United Kingdom

Business situation

Time series UK

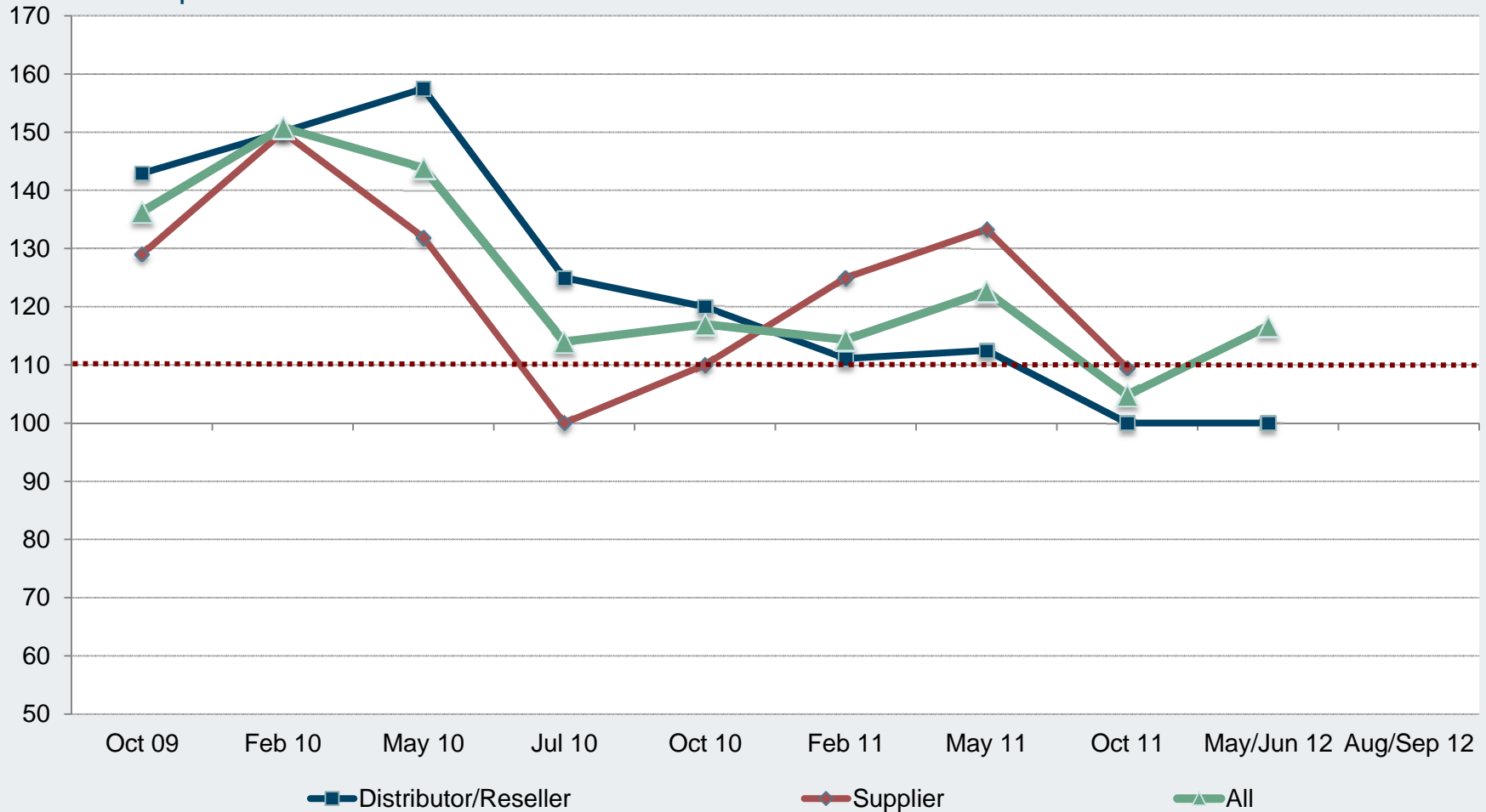
Business situation: Difference between positive ('Good') and negative ('Poor') evaluations plus 100



Business expectations

Time series UK

Business expectations: Difference between positive ('More favorable') and negative ('Less favorable') evaluations plus 100

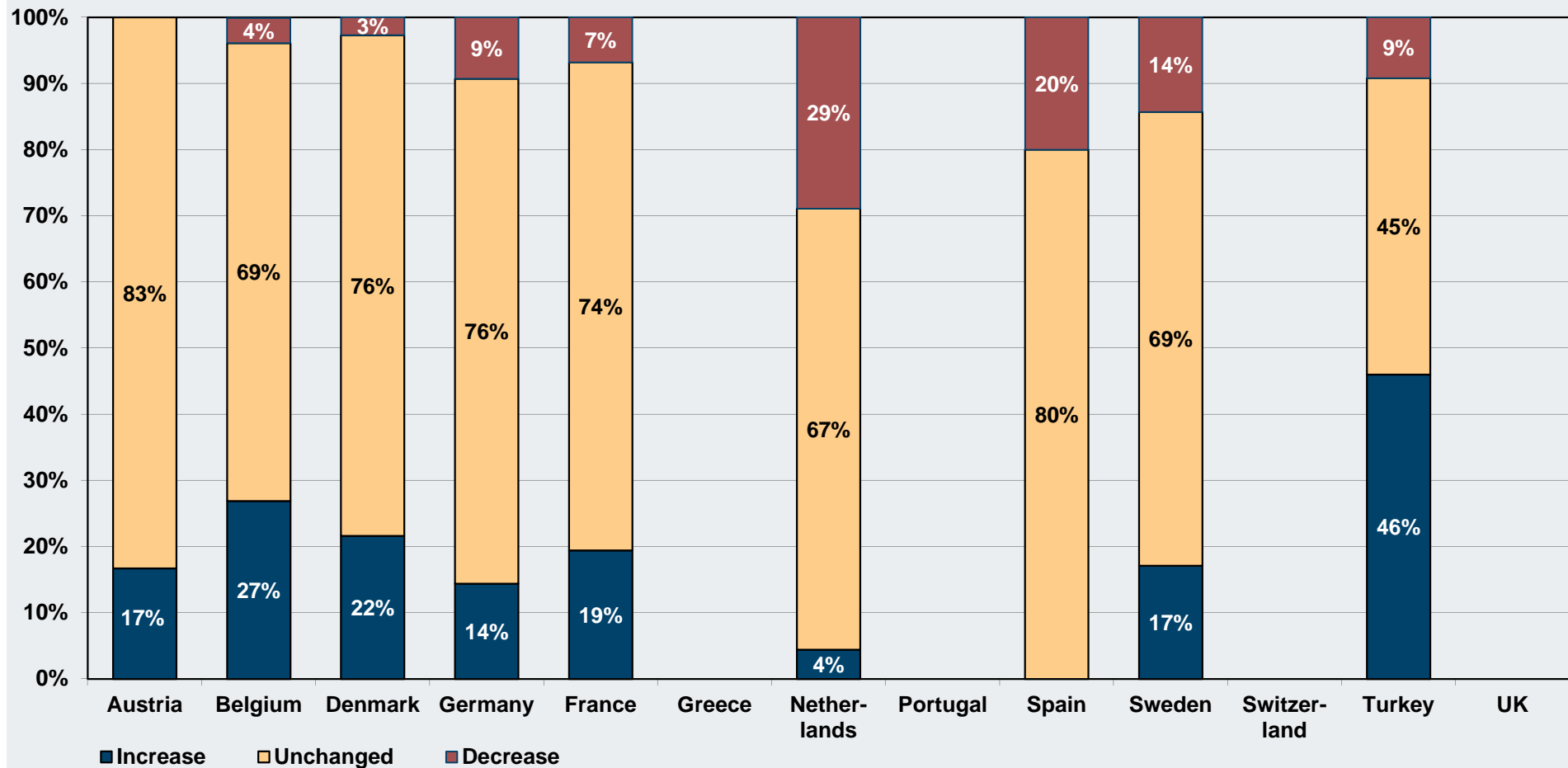


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Adjustments of business policy: Personell

All participants

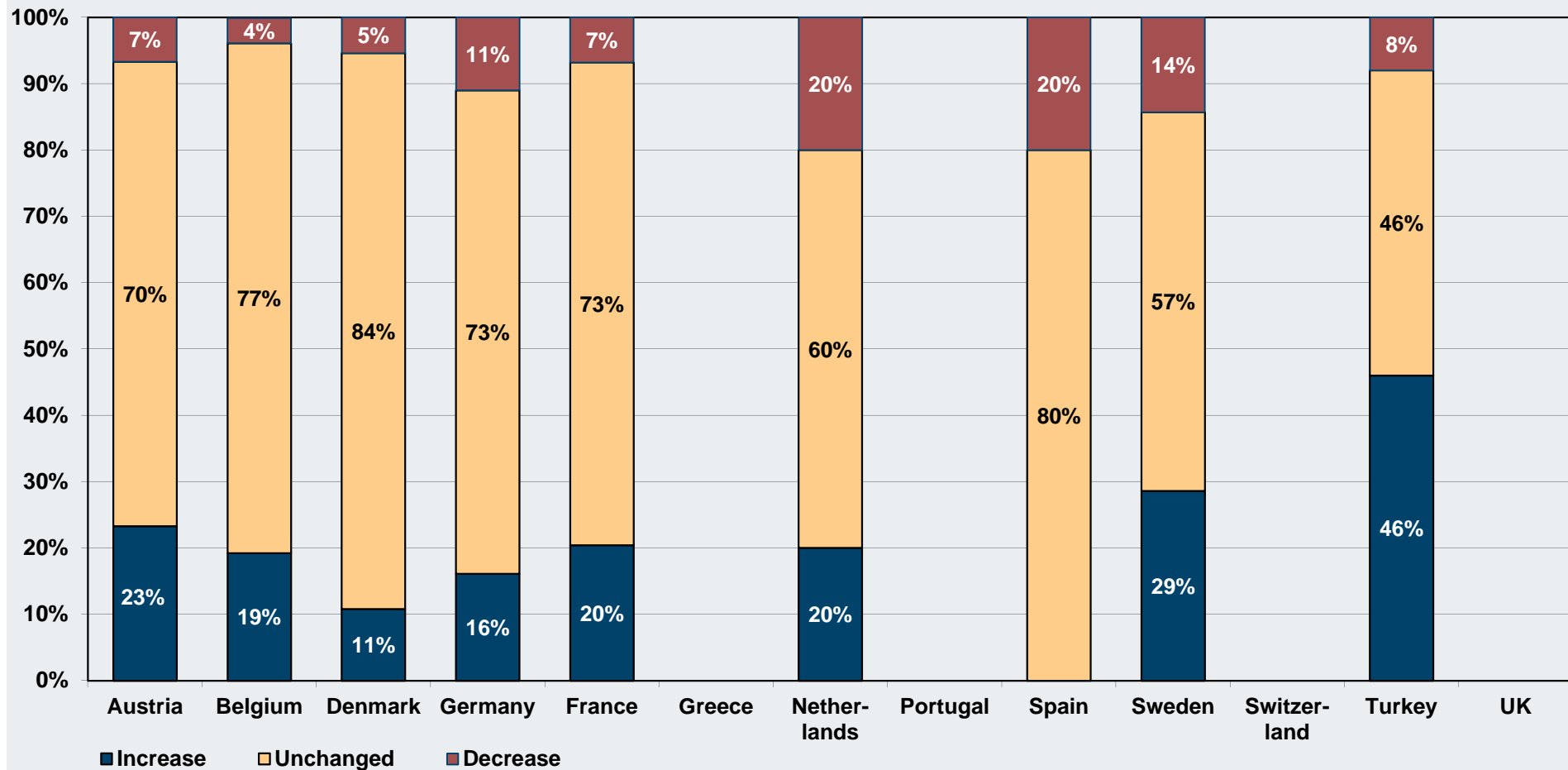
Adjustments of business policy: Which operational changes are your company likely to experience in the third quarter 2012? – Personell



Adjustments of business policy: Investments

All participants

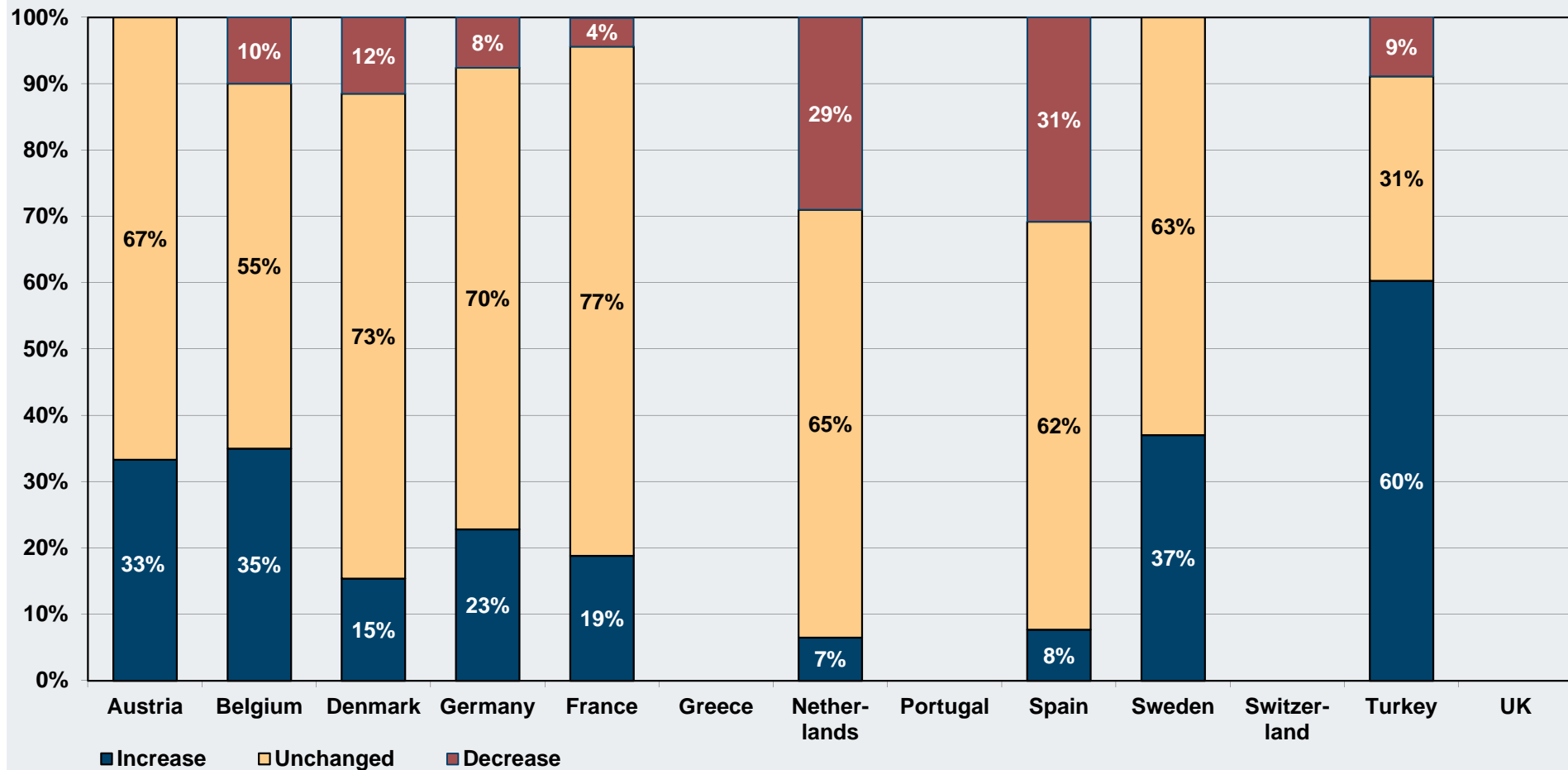
Adjustments of business policy: Which operational changes are your company likely to experience in the third quarter 2012? – Investments



Adjustments of business policy: Production

All participants

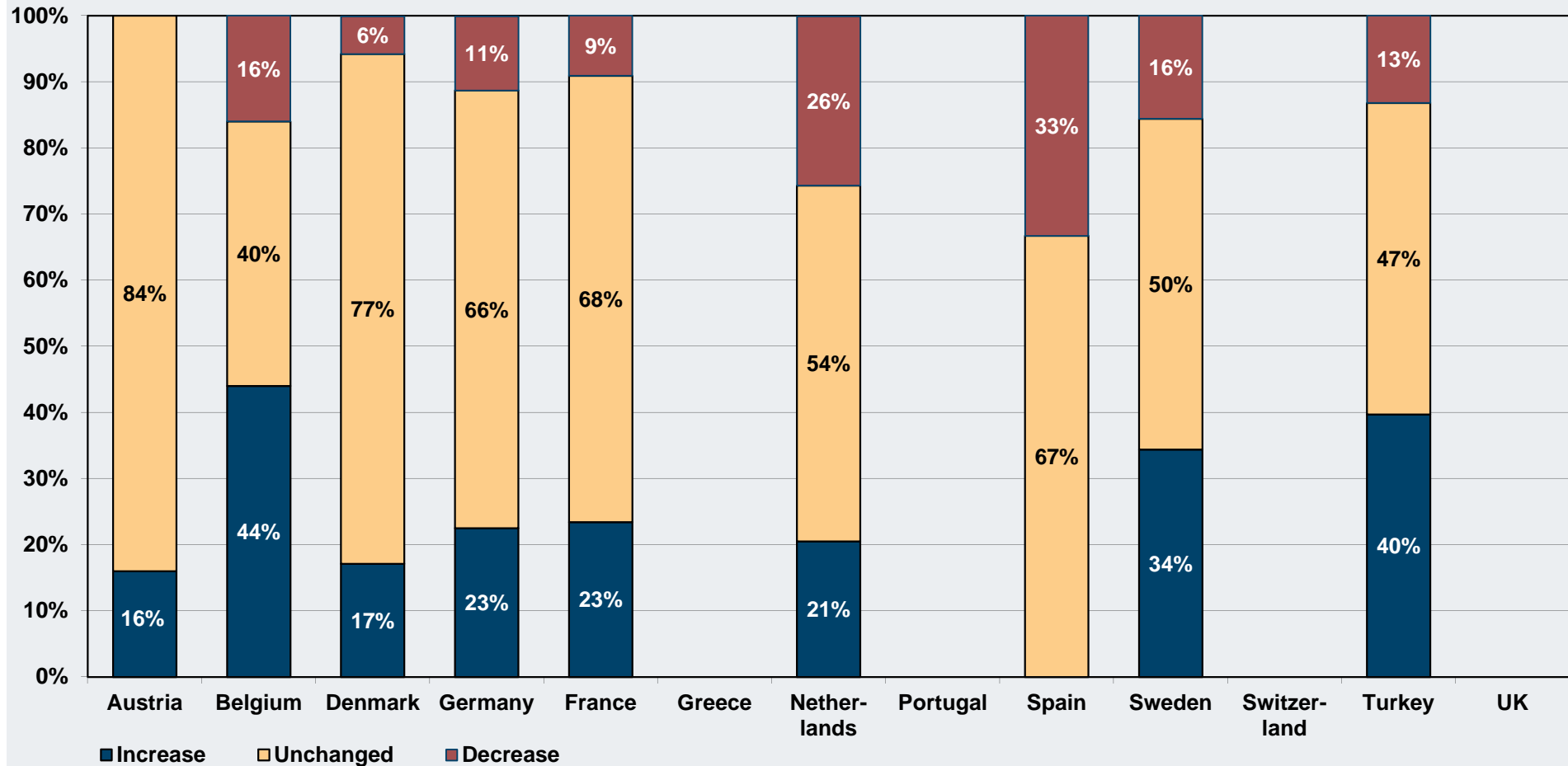
Adjustments of business policy: Which operational changes are your company likely to experience in the third quarter 2012? – Production



Adjustments of business policy: Import

All participants

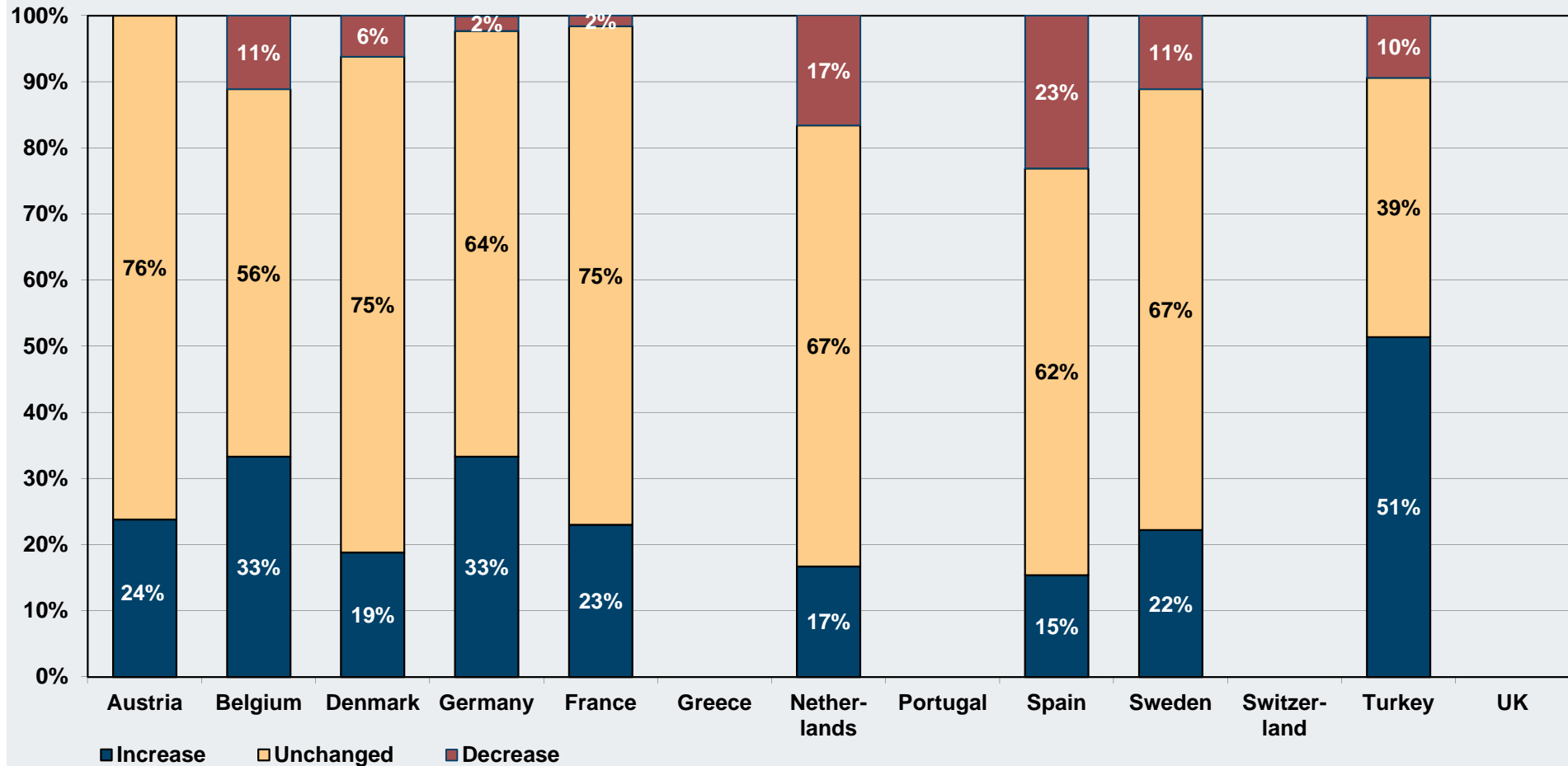
Adjustments of business policy: Which operational changes are your company likely to experience in the third quarter 2012? – **Import**



Adjustments of business policy: Export

All participants

Adjustments of business policy: Which operational changes are your company likely to experience in the third quarter 2012? – **Export**

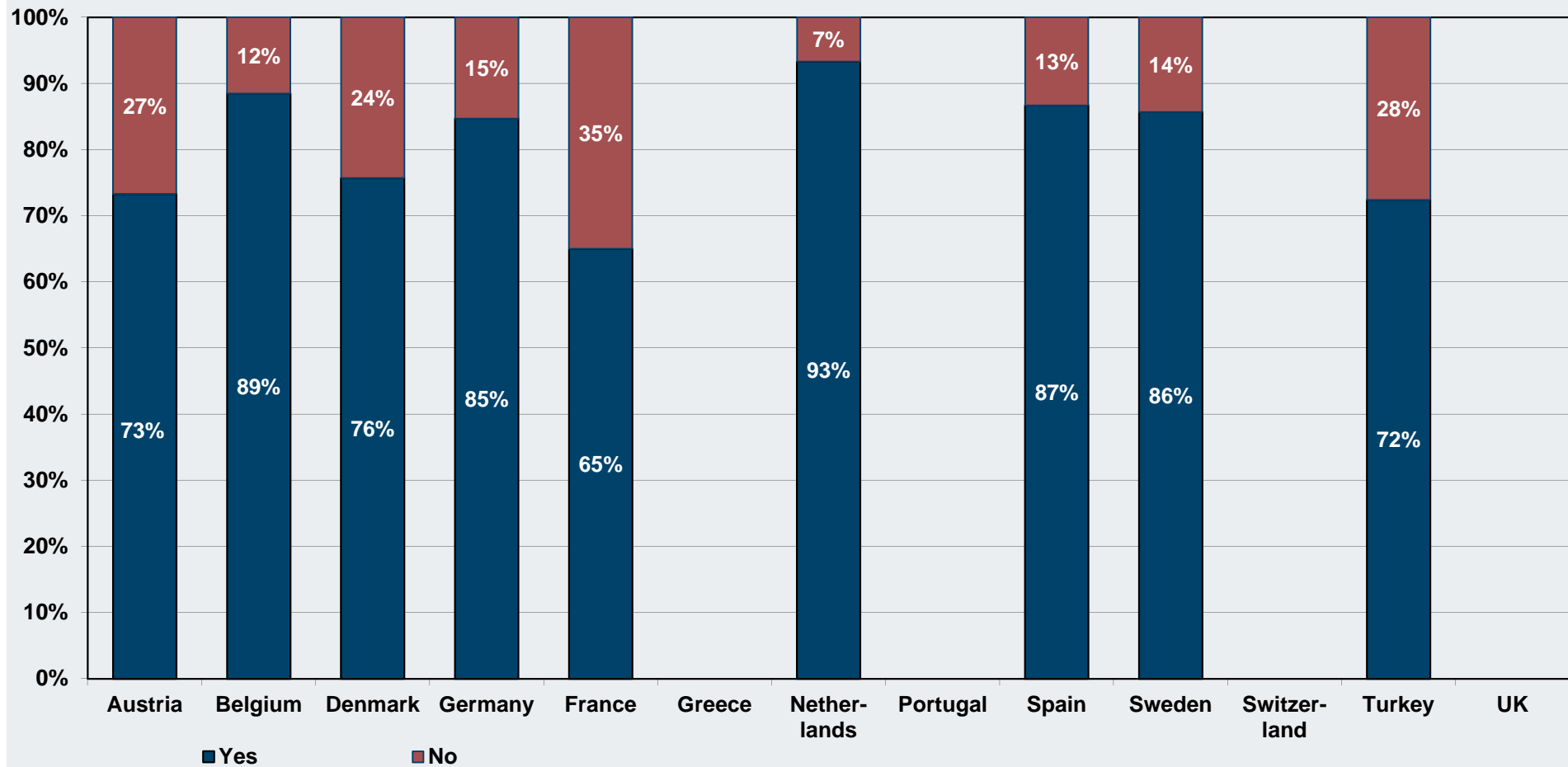


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About EPPA

All participants

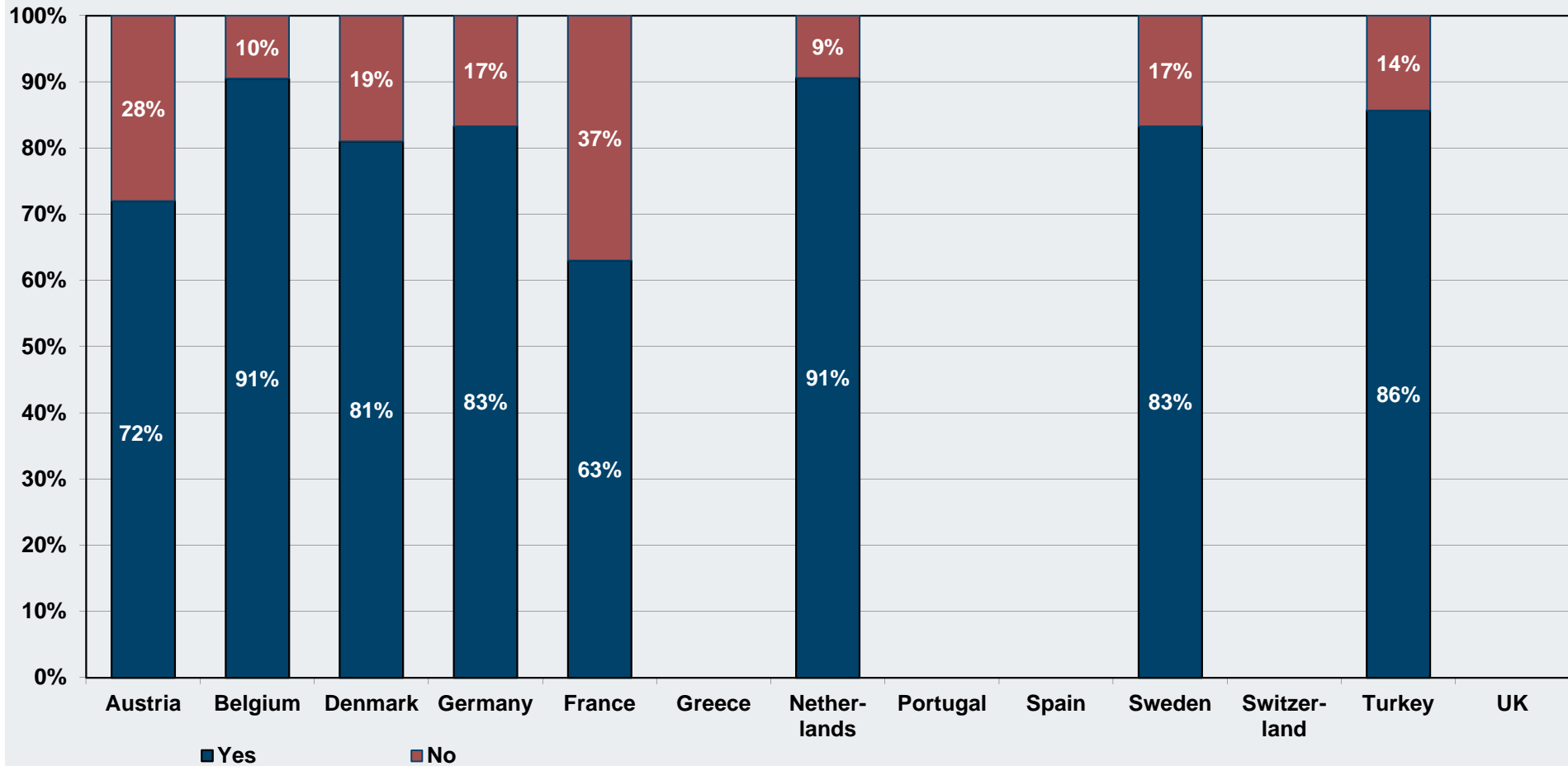
EPPA is the European Promotional Products Association and looks out for the interests of all companies within the promotional products industry. Do you know EPPA?



About EPPA

Distributor/Reseller

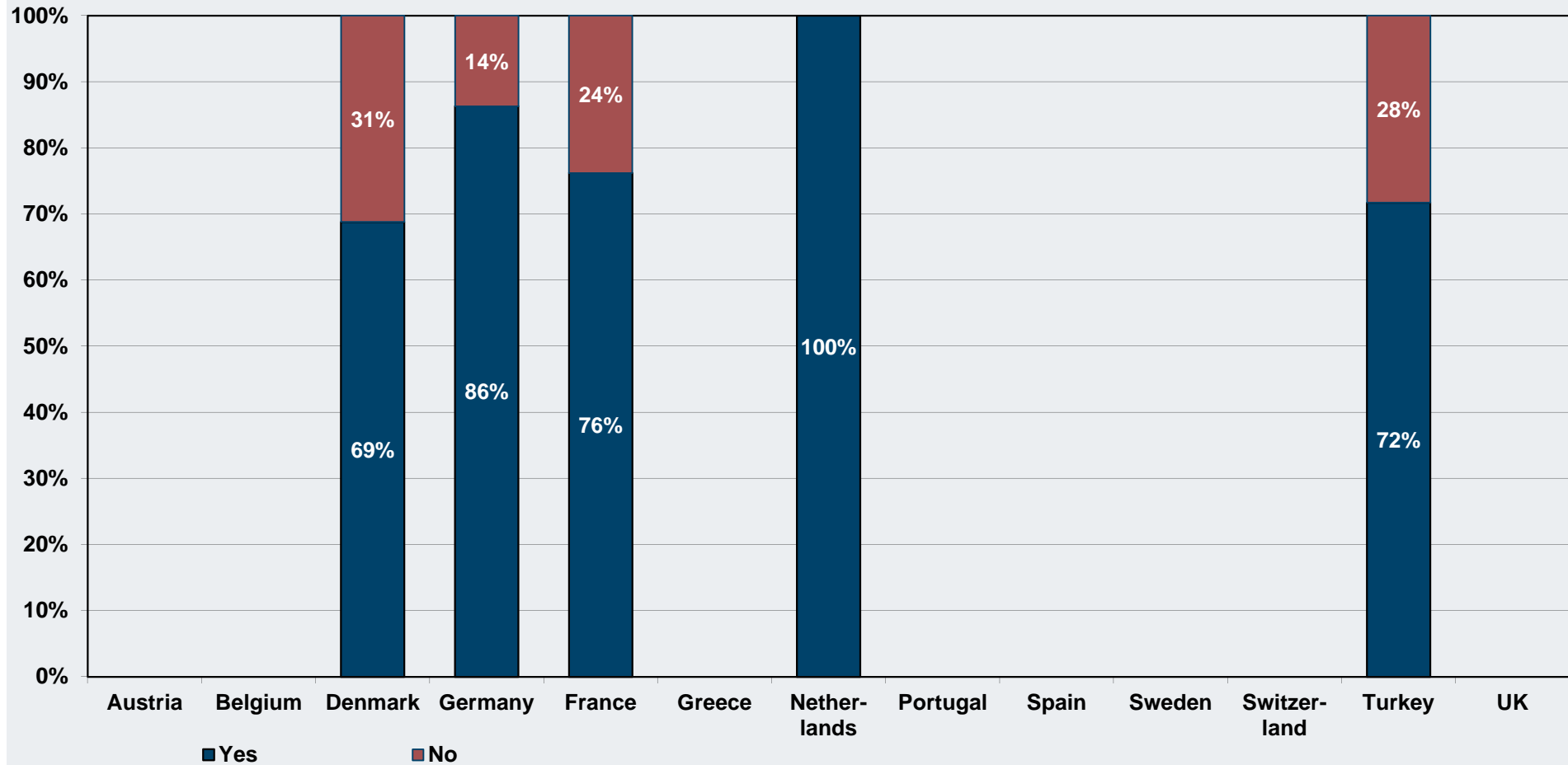
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About EPPA

Supplier

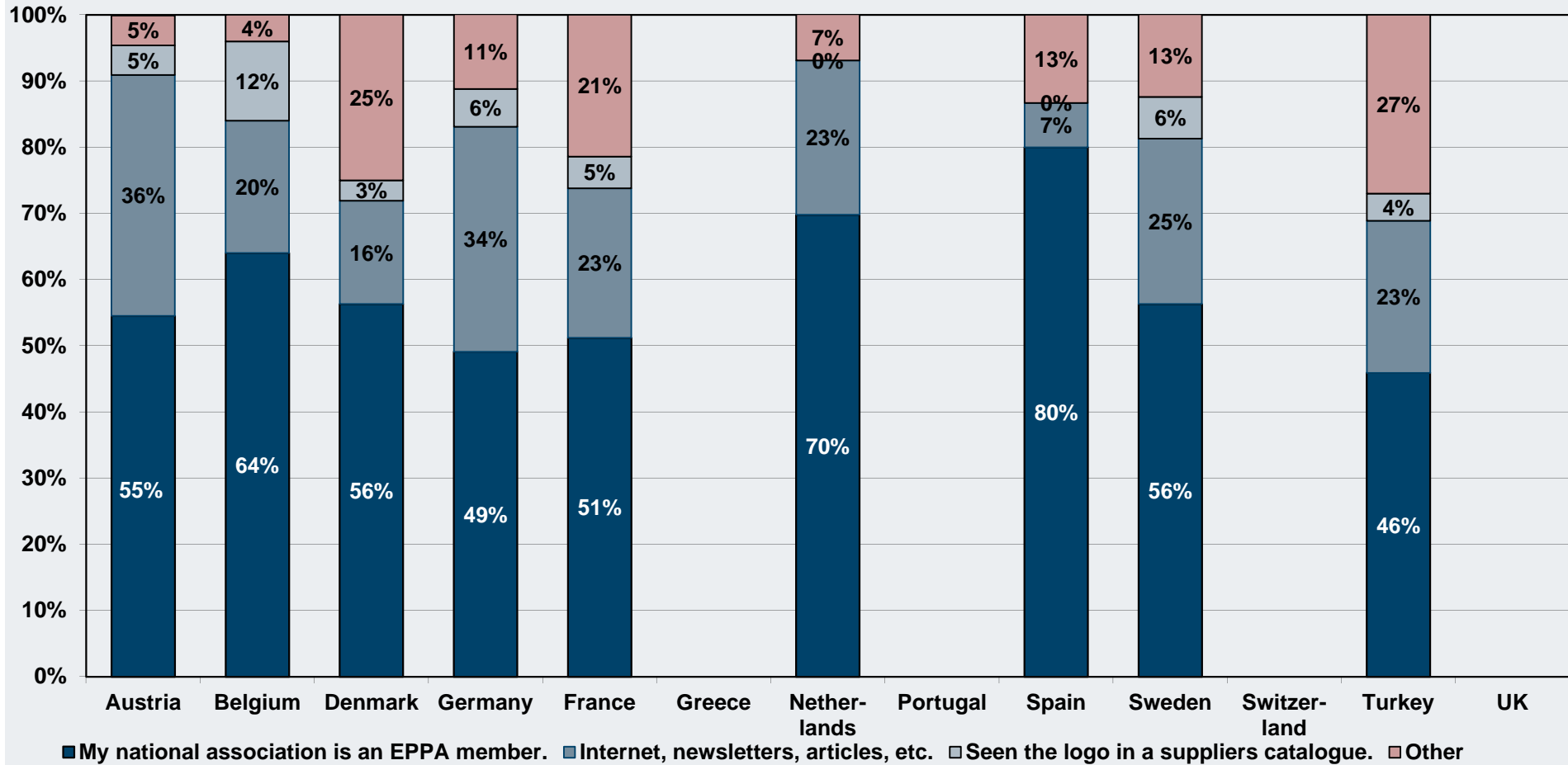
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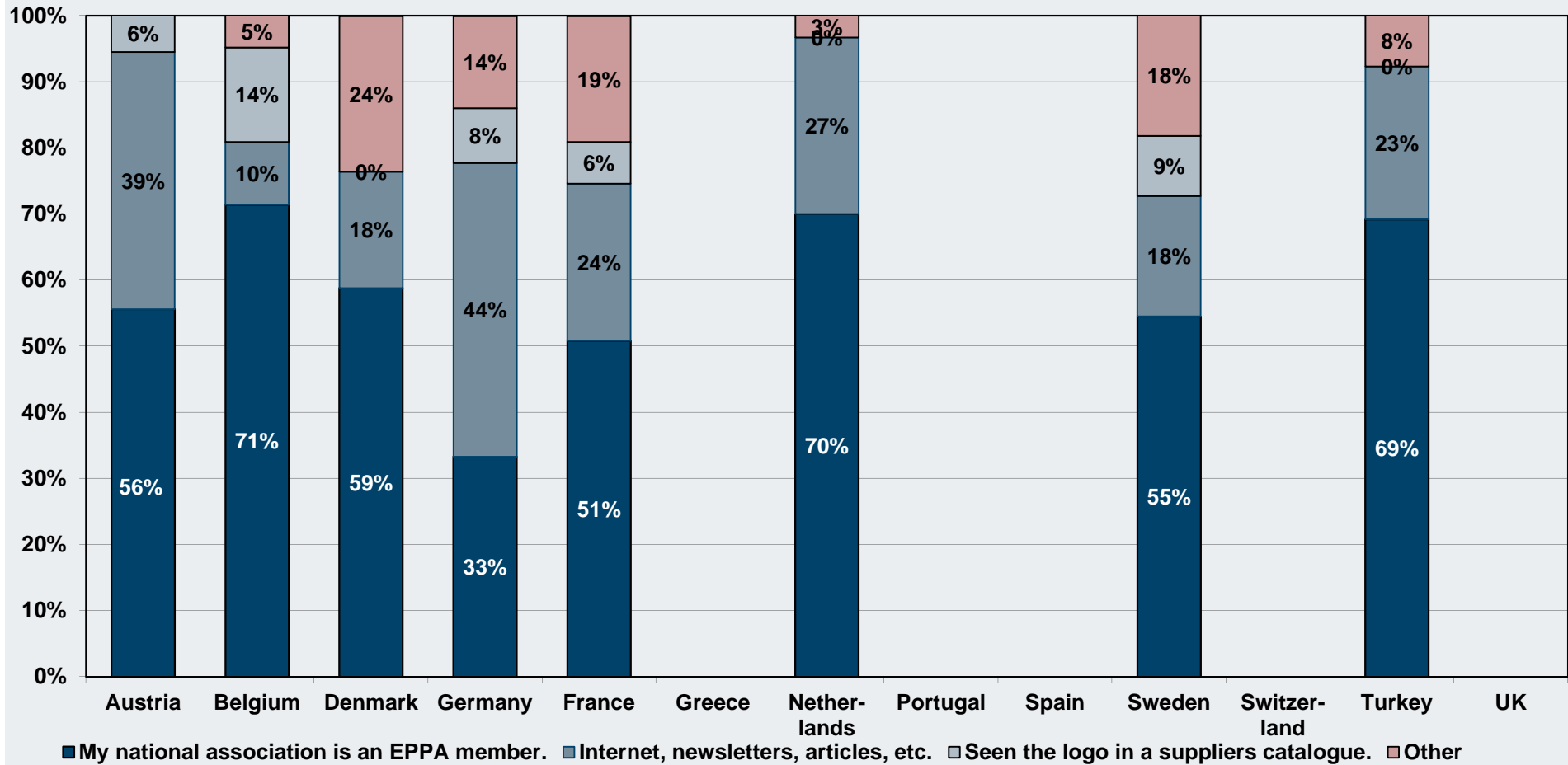
Do you know EPPA? If yes, please select how you know EPPA.



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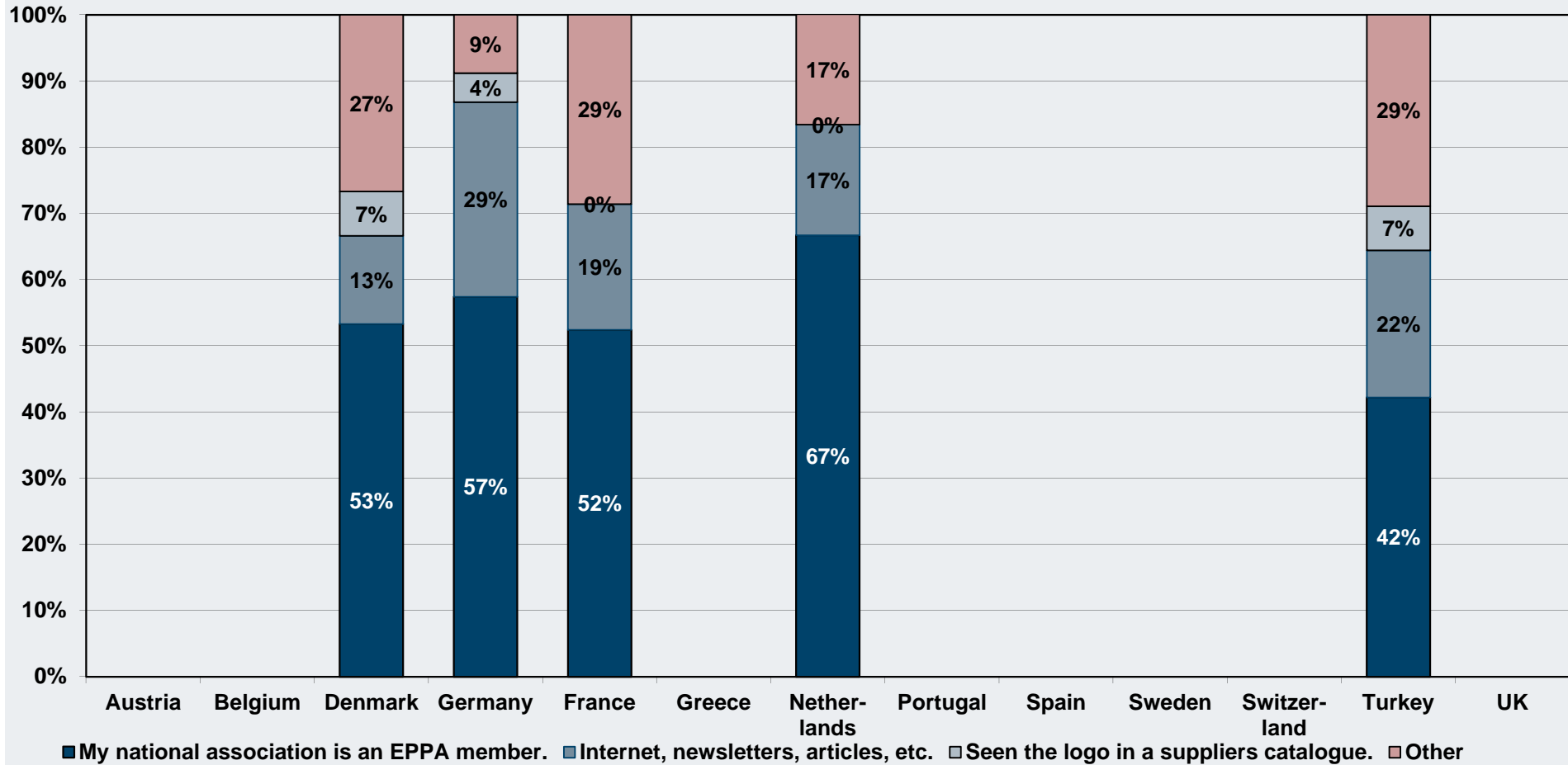
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Dr. Markus Preißner

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