

Das Who und
How der Branche.
Mein PSI.

Promotional Product Market 2023 Presentation of Results

Presentation structure

- **Presentation structure**
- **Scope & mission & overview**
- **Survey & Sample**
- **Market data & extrapolation**
- **Country packages**
 - **EuropeTop10 + Countries**
 - **Deployment of spendings**
 - **Spendings by industry buyers**
 - **Product segments - allocation 2022 + 2023**
 - **Channel of Purchase (Sales Channel) 2022 + 2023**
 - **Relevance of sustainability**
 - **Importance of sustainable certificates**
 - **proportion of your promotional products that have sustainability certificates**
 - **Importance of product and provider characteristics**

Scope & mission & overview

- **Main task: to develop the market model of promotional products in 2022 and 2023**
 - **Data and structure out of the research 2018 (psi member survey + small buyers research)**
 - **But with elementary changes in the methods to get the following benefits:**
 - **specific information of product segments for each country possible**
 - **Much more validation and closer markets for each of the countries**
 - **Get a view on the areas that couldn't be captured with the PSI survey**
 - **Direct import out of asia or direct procurement from manufacturers**
- **Chosen option and approach (decided in 2019):**
 - **2,000 interviews in total with exclusively INDUSTRY BUYERS**
 - **With 200 Interviews each in country UK, GER, FRA, ITA, ESP, NEL, POL, BEL, AUT, SW**
 - **Evaluated according to countries, size classes and industries**
 - **Validation of deployments with PSI member survey in 2023 (still active)**

The market model will be based on interviews with INDUSTRY BUYERS in Europe Top 10



Base:

2,176 Interviews with
industry buyers

Countries surveyed

Spending by industry buyers on promotional products 2023

13,262 Mio. €

Increase compared to 2022

8 %



Top 3 products



Clothing & textiles



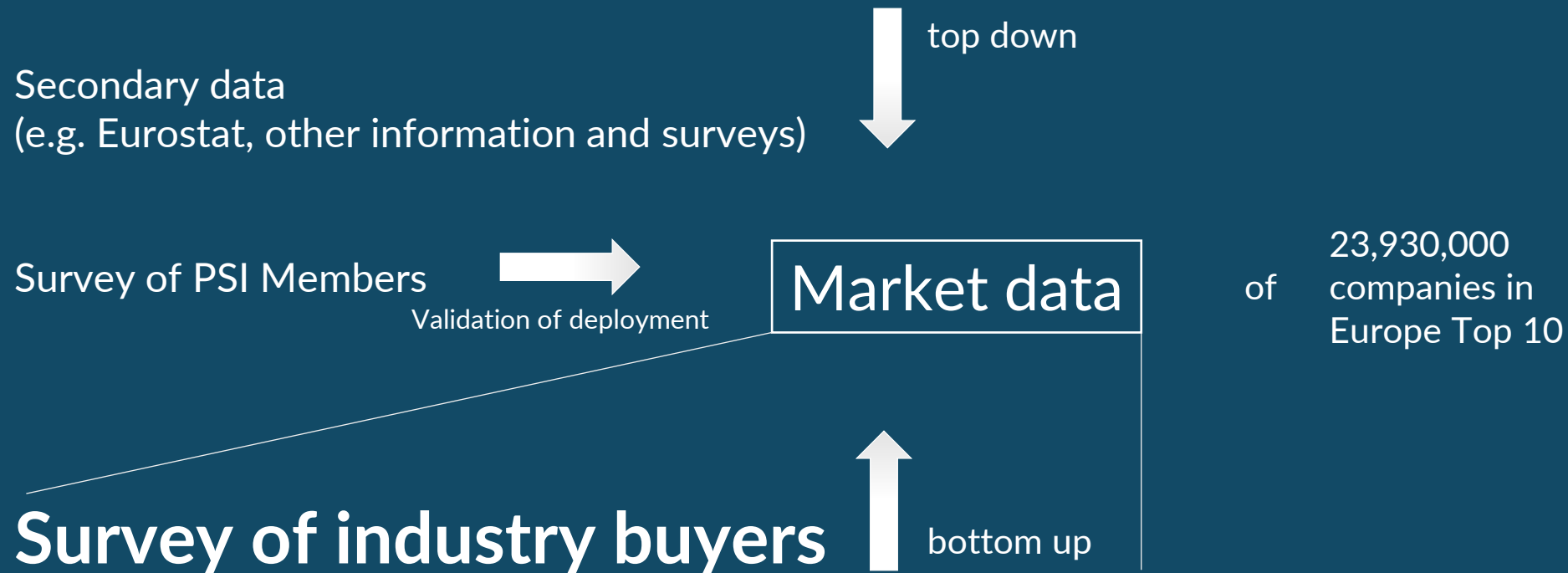
Electronics &
multimedia



School & office
supplies

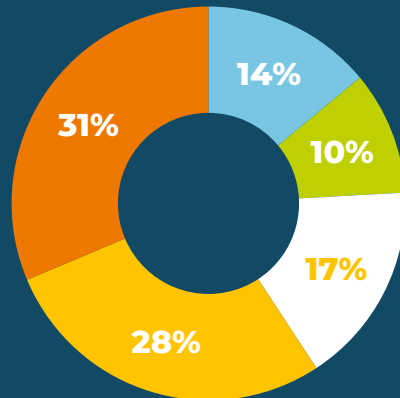


Market data & extrapolation How to compute...?



The survey and sample – Industry buyers only!

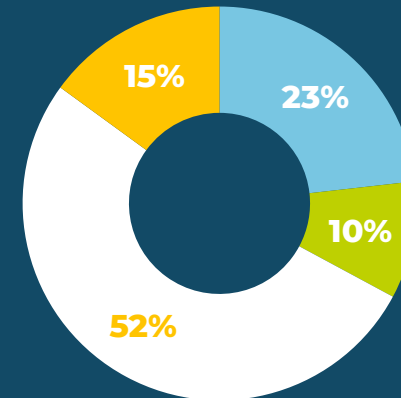
2,176 Interviews in total



»How many employees does your company have?«

- 0 to 9 employees
- 10 to 19 employees
- 20 to 49 employees
- 50 to 249 employees
- 250 or more employees

Disproportional approach to get reliable number of interviews in each segment



» What sector can your company be allocated to?«

- Industry
- Retail
- Service
- Non Profit

Representative approach and allocation

Questions:

How many employees does your company have?

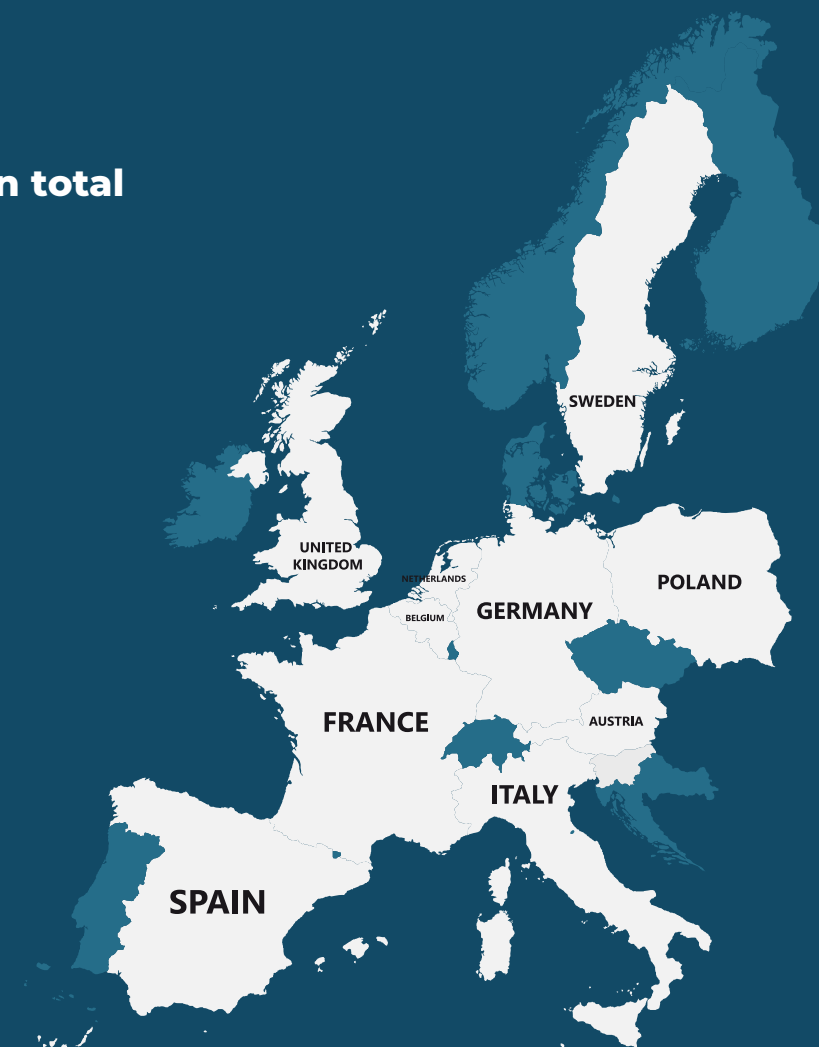
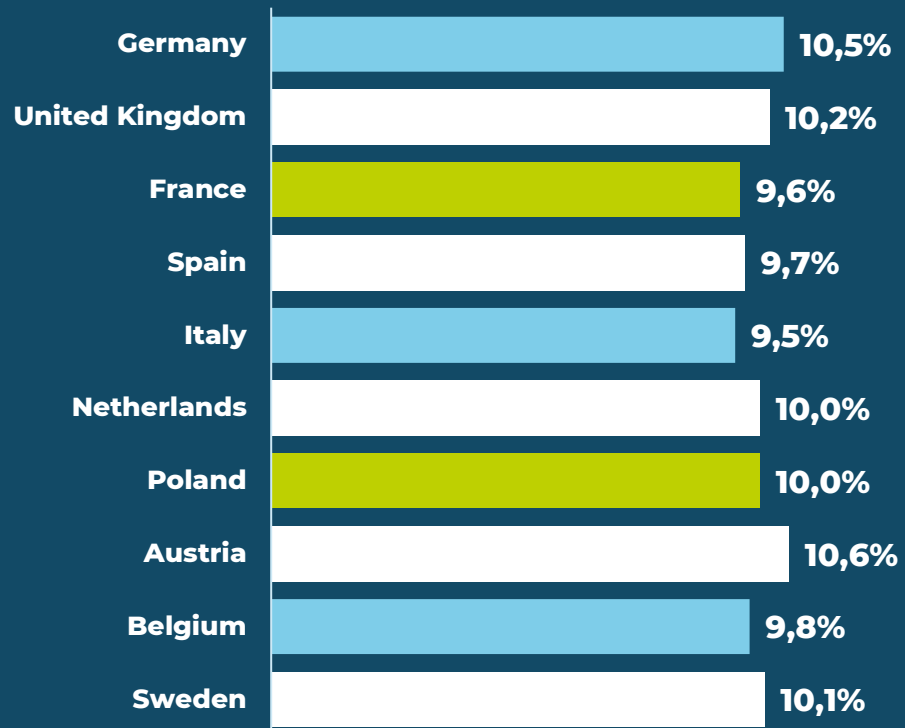
What sector can your company be allocated to?

Distribution of countries



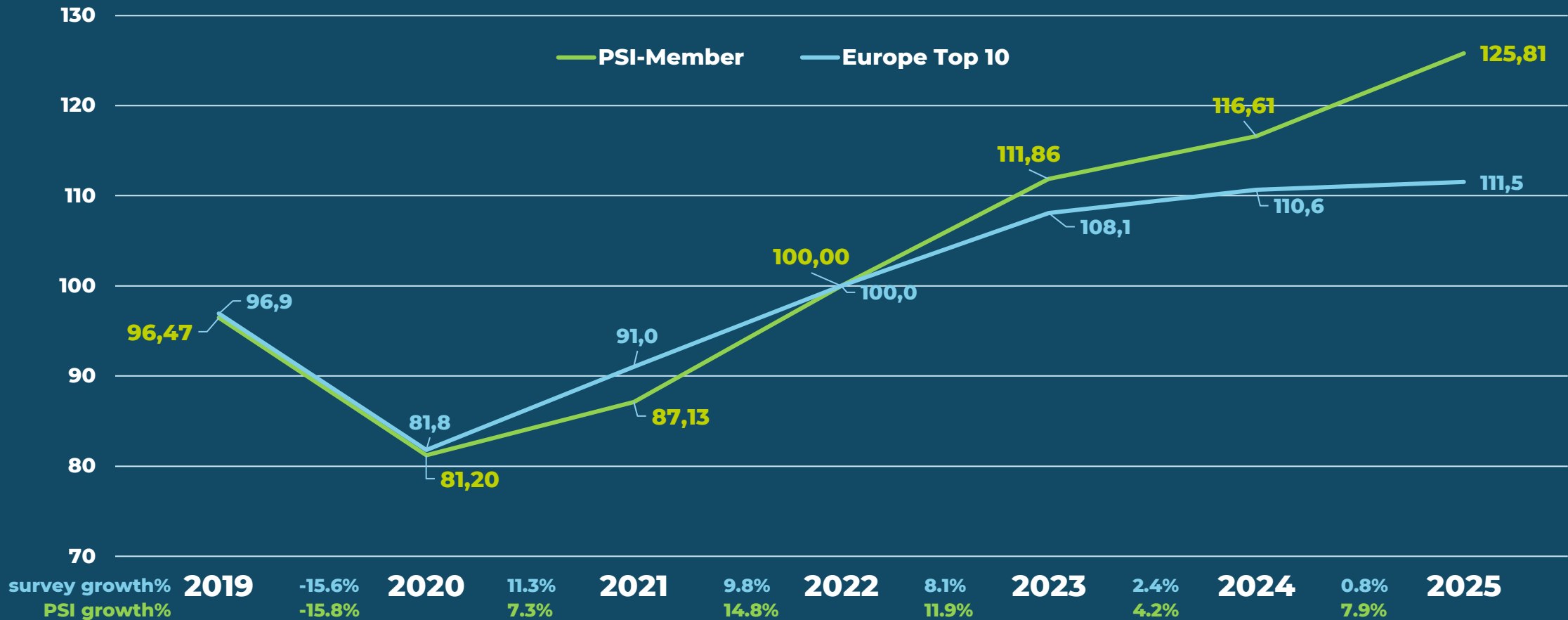
» From where are you participating?«

2,176 Interviews in total



Deployment of Spendings

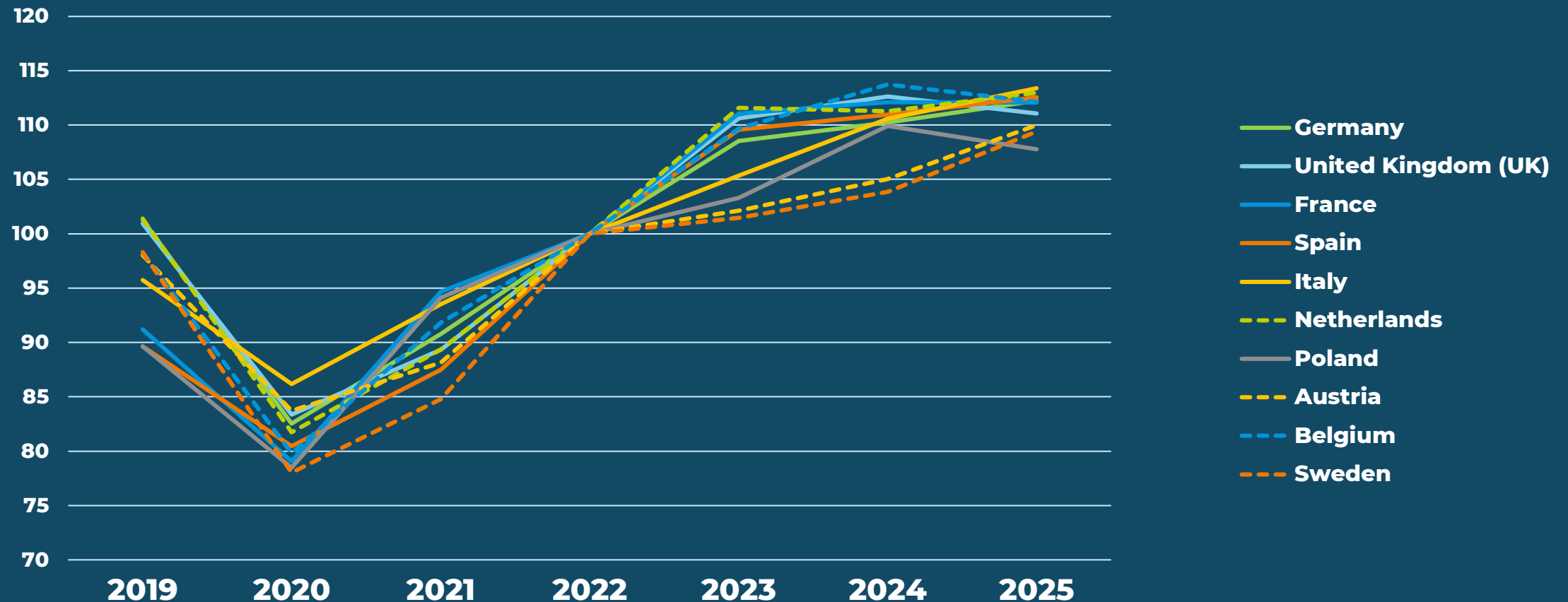
2022 = 100 Index points



Question:

Please try to indicate the development of your spending for promotional products, taking 2022 as the starting point, for the past and future years. Has your company spent more or less in recent years?

Deployment of Spendings

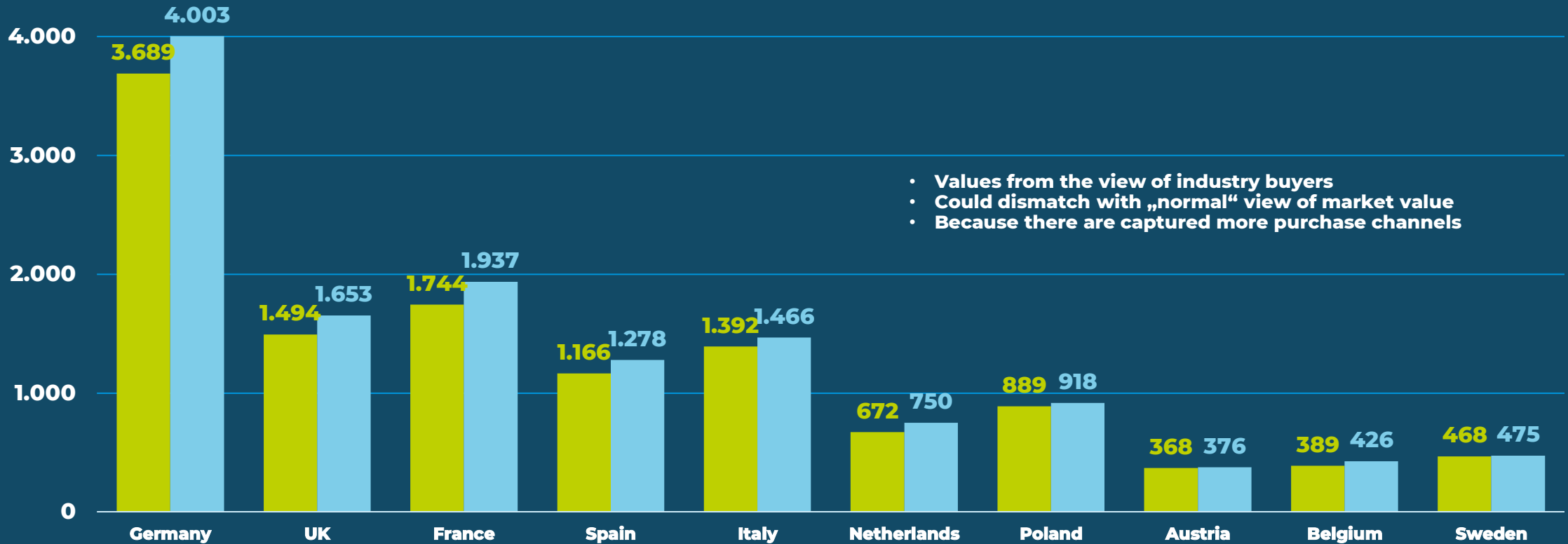


Question:

Please try to indicate the development of your spending for promotional products, taking 2022 as the starting point, for the past and future years. Has your company spent more or less in recent years?

Spending in countries in Million Euro

■ 2022 ■ 2023



Spending by Industry Buyers in Million Euro

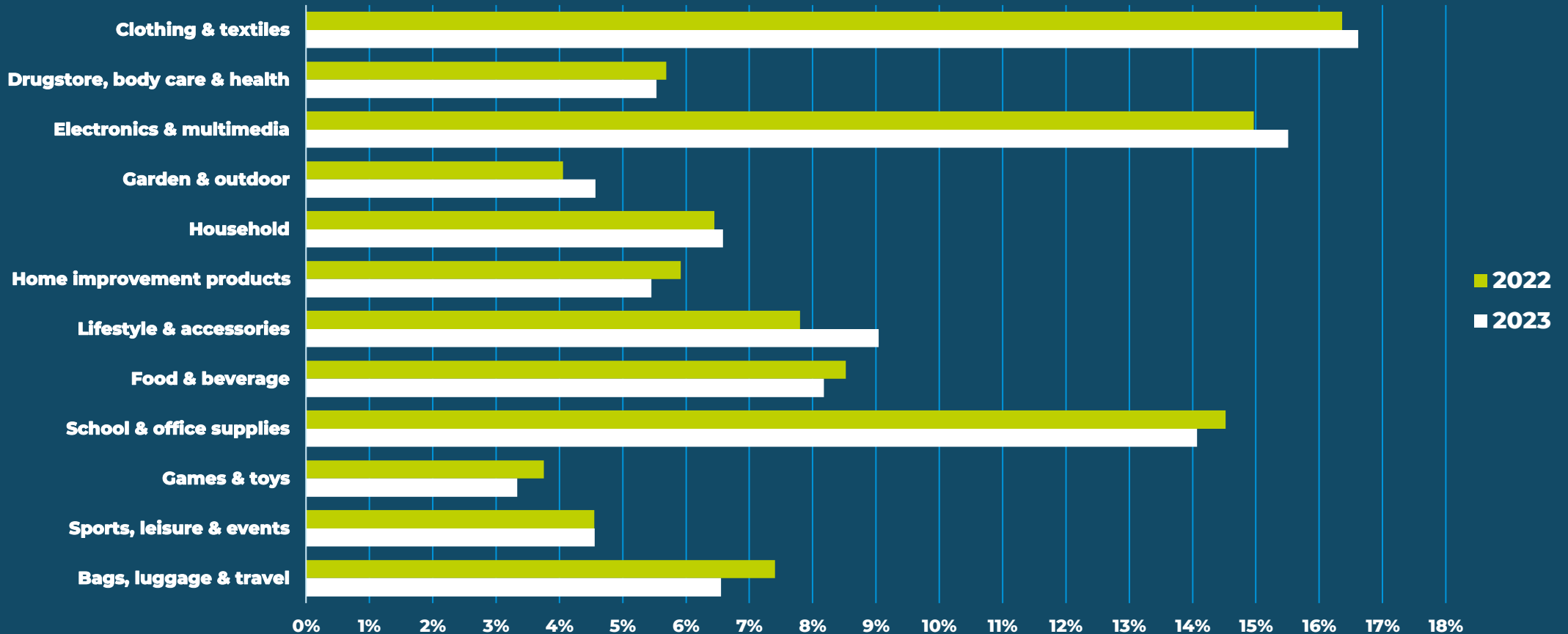
Europe Top 10 – 2022

12,271	Total
5,025	0 to 9 employees
1,164	10 to 19 employees
1,116	20 to 49 employees
2,641	50 to 249 employees
2,326	250 or more employees

Europe Top 10 – 2023

13,282	Total
5,356	0 to 9 employees
1,225	10 to 19 employees
1,219	20 to 49 employees
2,893	50 to 249 employees
2,589	250 or more employees

Product segments: Allocation of spendings %

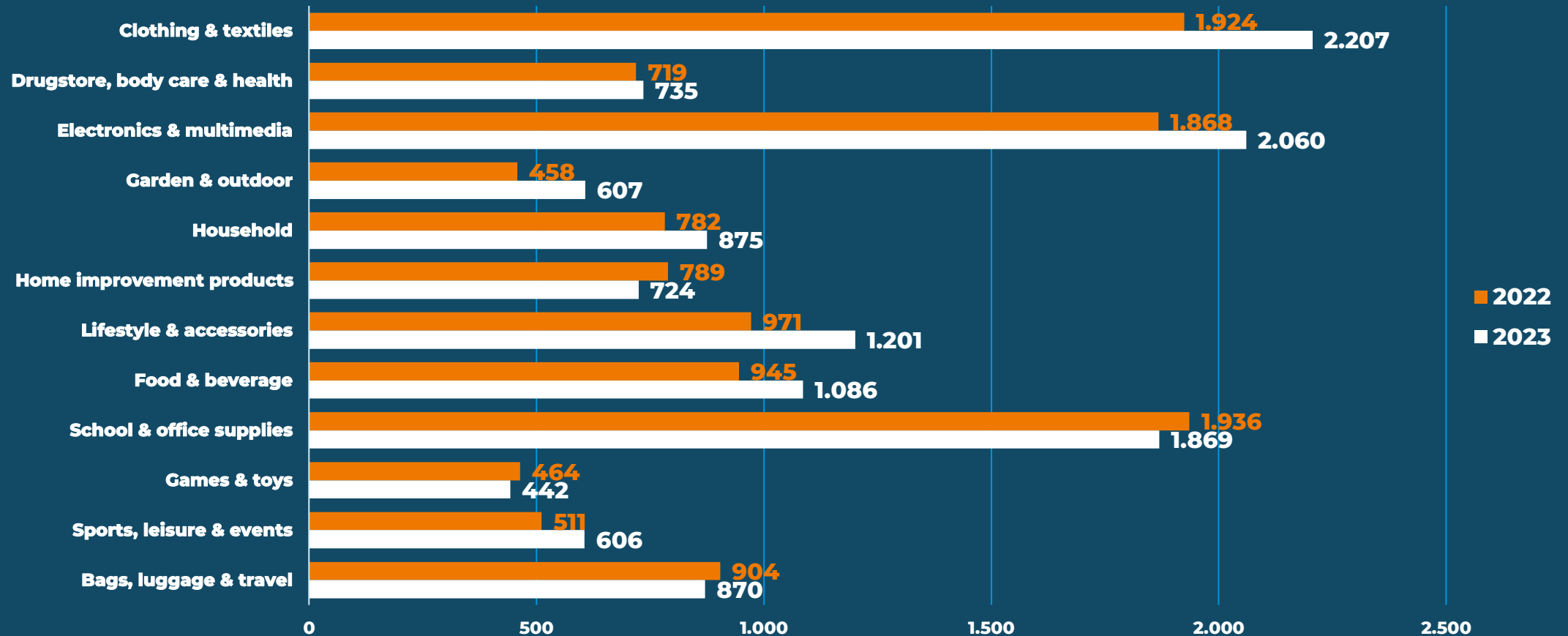


Question:

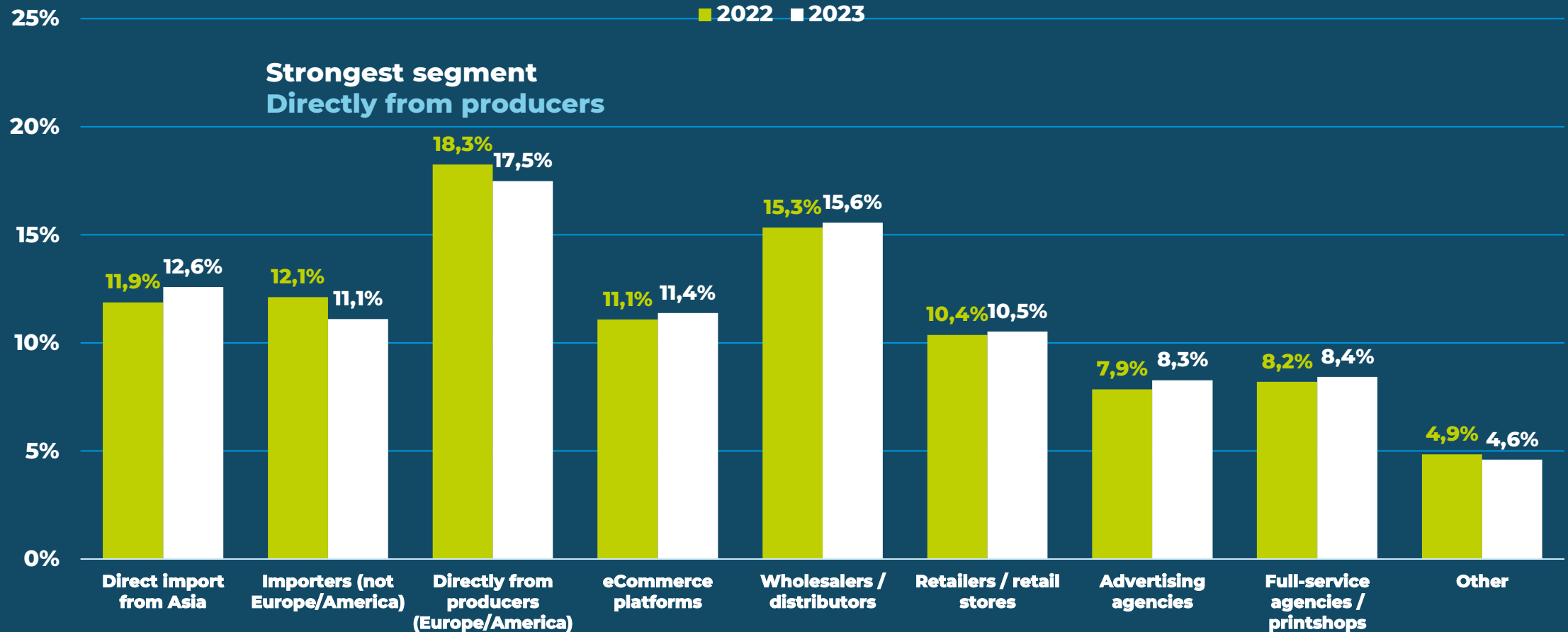
What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



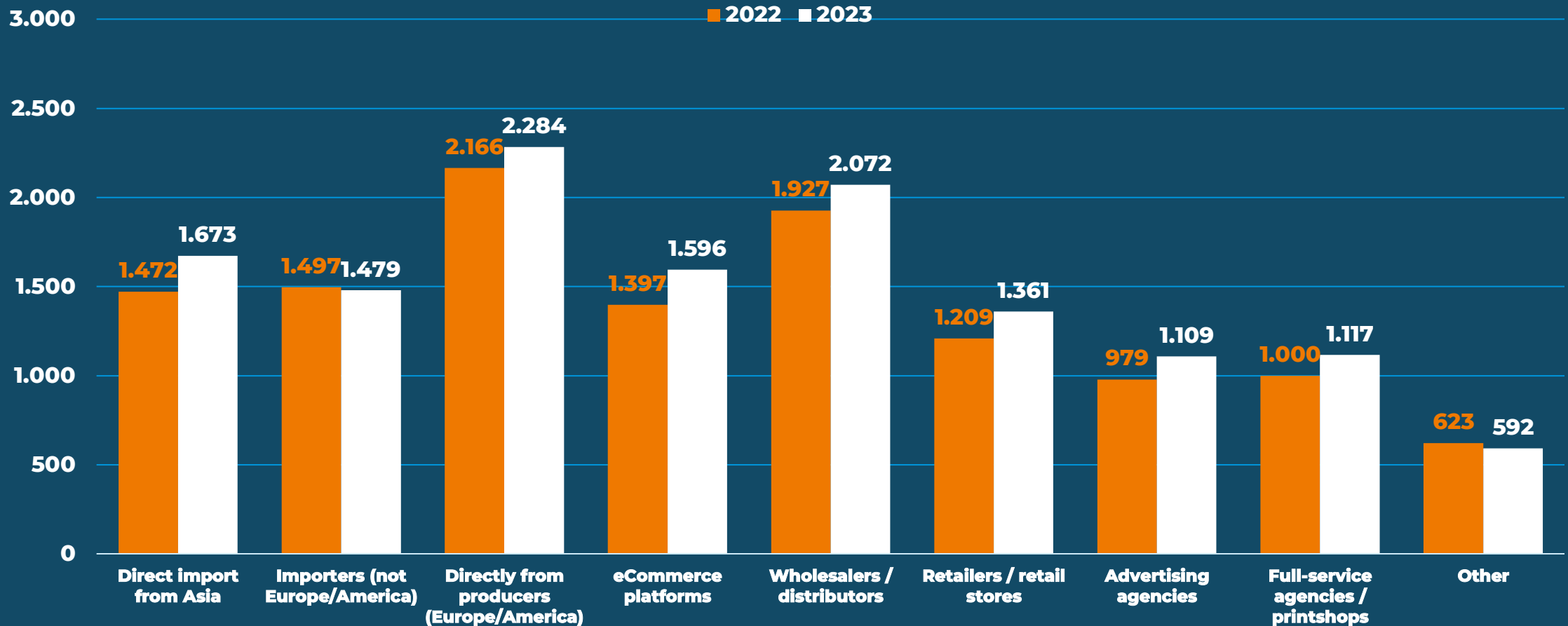
Purchase Channel: Allocation in %



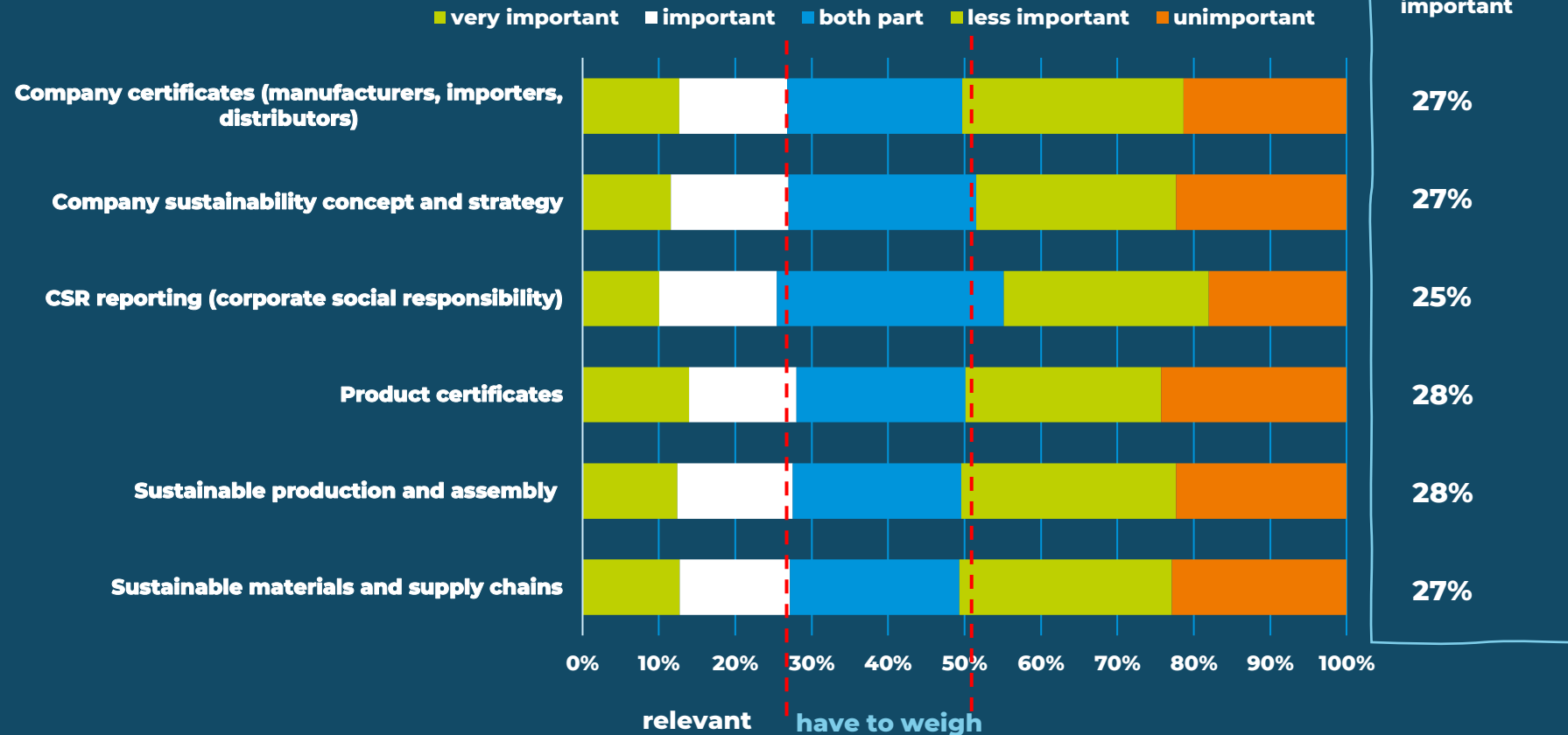
Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro



Relevance of sustainability



sustainable certificates considered relevant by about a quarter of respondents.

almost as many have to weigh

Sustainability factors correlate strongly

Question:
How important are the following sustainable certificates and measures in your purchase decision? Please rate them from “1 = very important” to “5 = not important”

Relevance of sustainability in countries

	Germany	United Kingdom	France	Spain	Italy	Netherlands	Poland	Austria	Belgium	Sweden
Company certificates	3.19	3.10	3.44	3.58	3.71	3.33	3.50	2.94	3.12	3.37
Company sustainability concept and strategy	3.25	3.20	3.46	3.47	3.62	3.39	3.34	3.00	3.08	3.44
CSR reporting (corporate social responsibility)	3.23	3.16	3.36	3.43	3.49	3.31	3.39	3.07	3.01	3.31
Product certificates	3.14	3.12	3.50	3.55	3.66	3.34	3.47	2.93	3.21	3.36
Sustainable production and assembly	3.29	3.19	3.38	3.50	3.70	3.46	3.39	2.88	3.13	3.41
Sustainable materials and supply chains	3.14	3.22	3.52	3.55	3.61	3.36	3.48	2.92	3.10	3.52

Level of relevance:

Higher level

Balanced

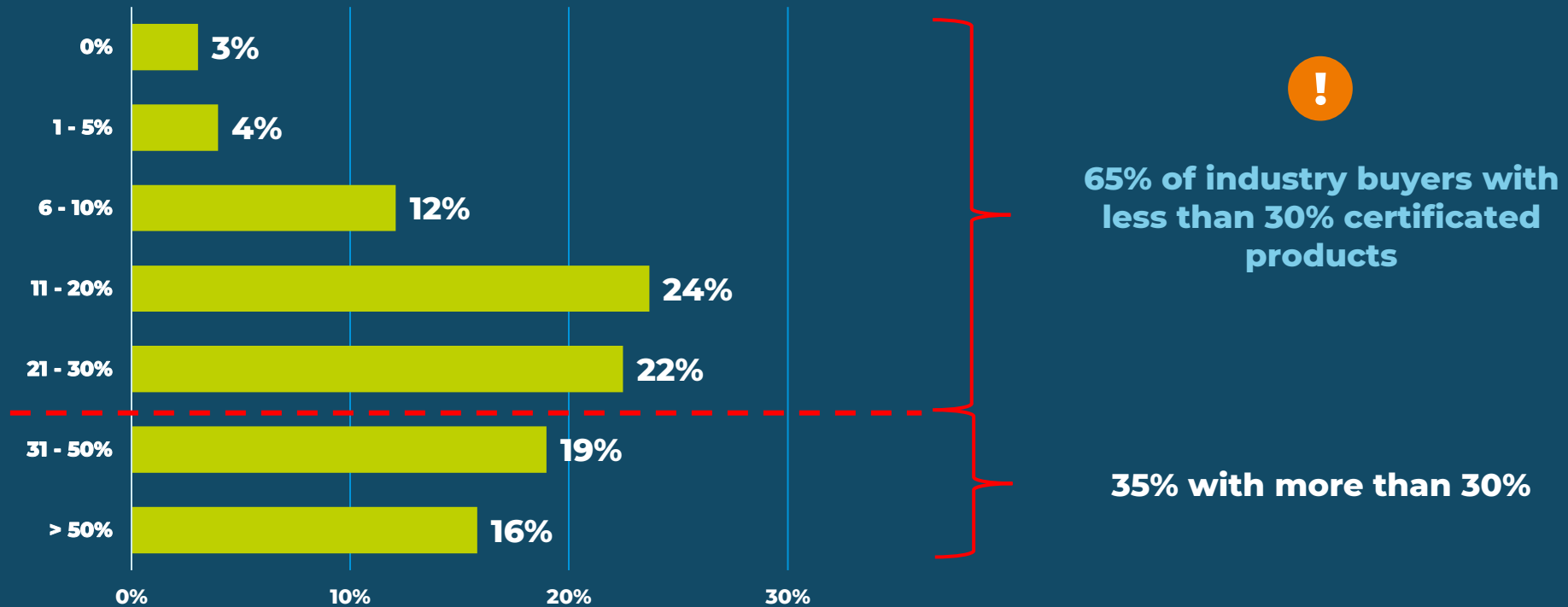
Lower level



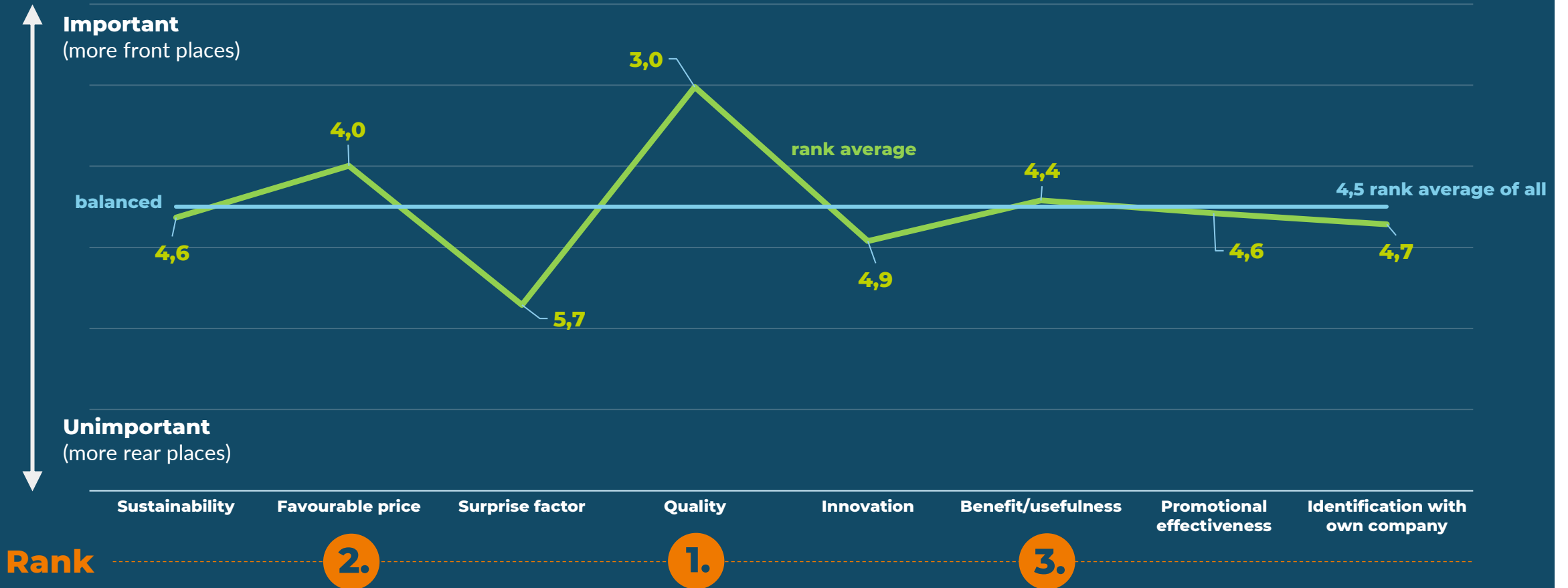
Question:

How important are the following sustainable certificates and measures in your purchase decision? Please rate them from “1 = very important” to “5 = not important”

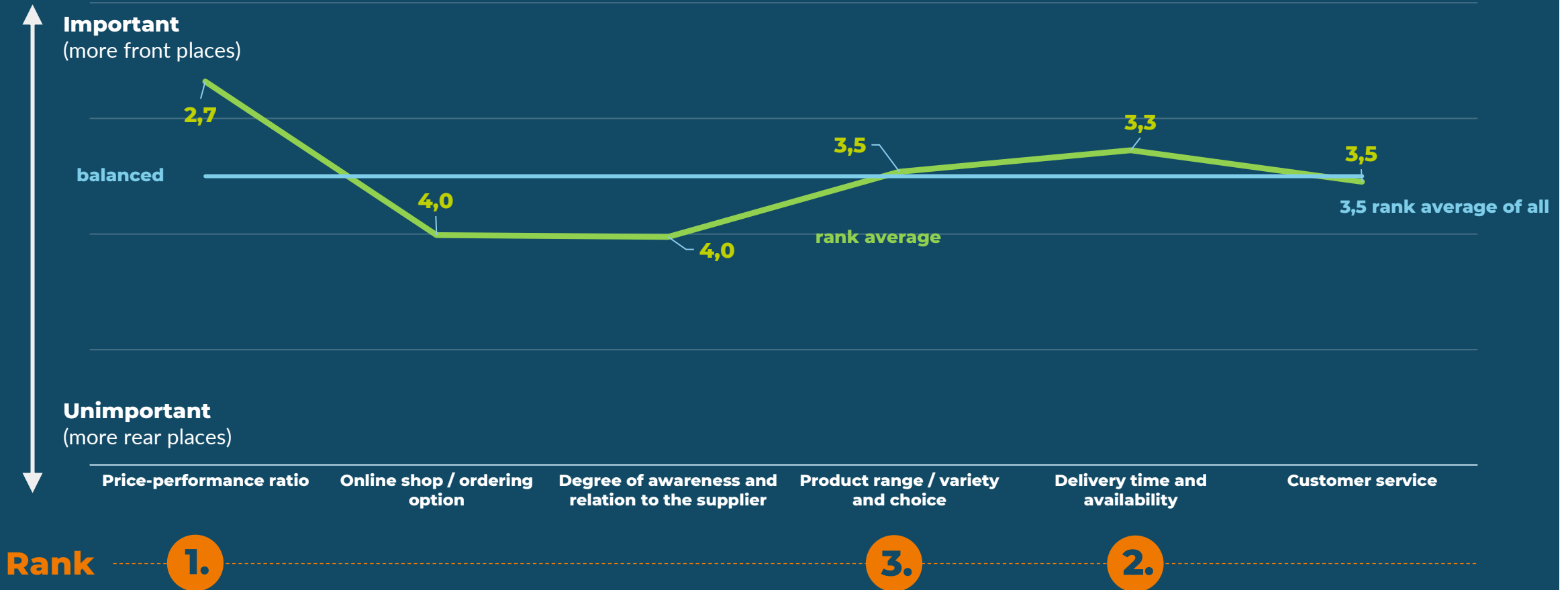
Part of promotional products with sustainability certificates



Products - Importance of characteristics ranking from place 1 to 8



Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

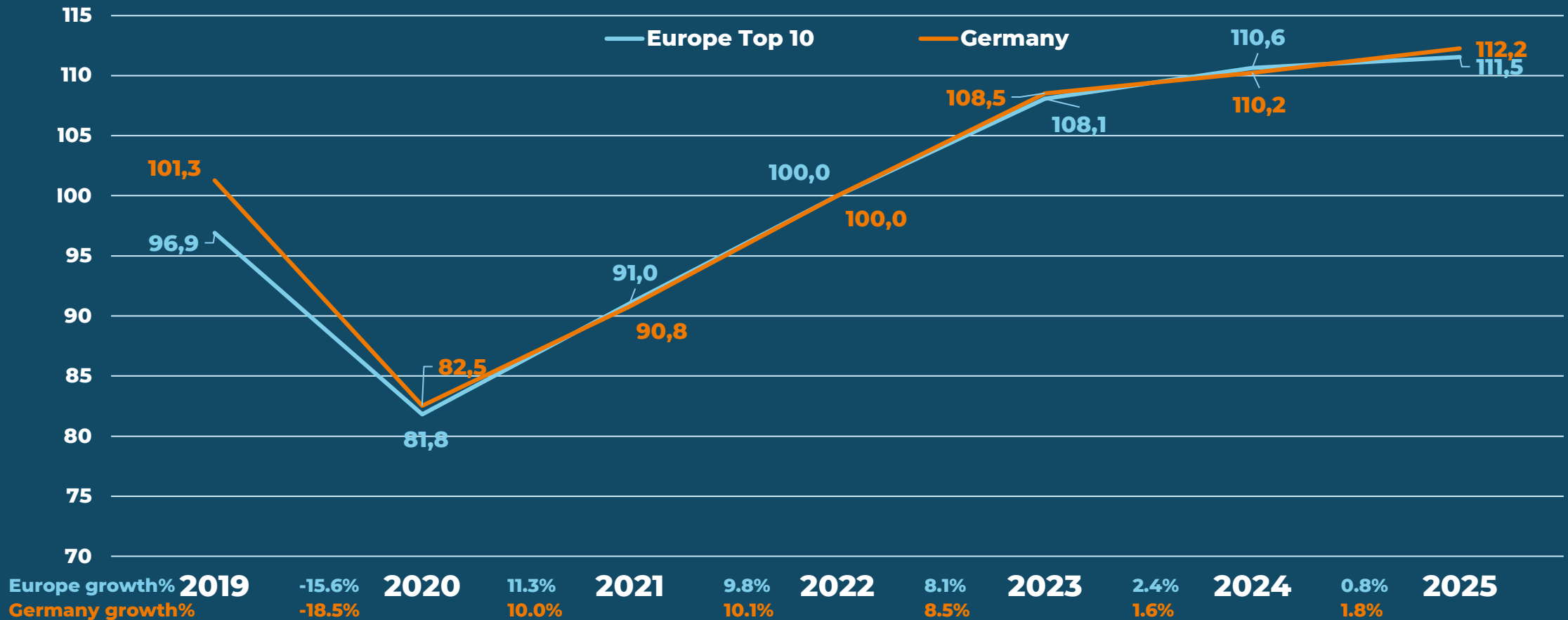
Das Who und
How der Branche.
Mein PSI.

Germany



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers in Million Euro

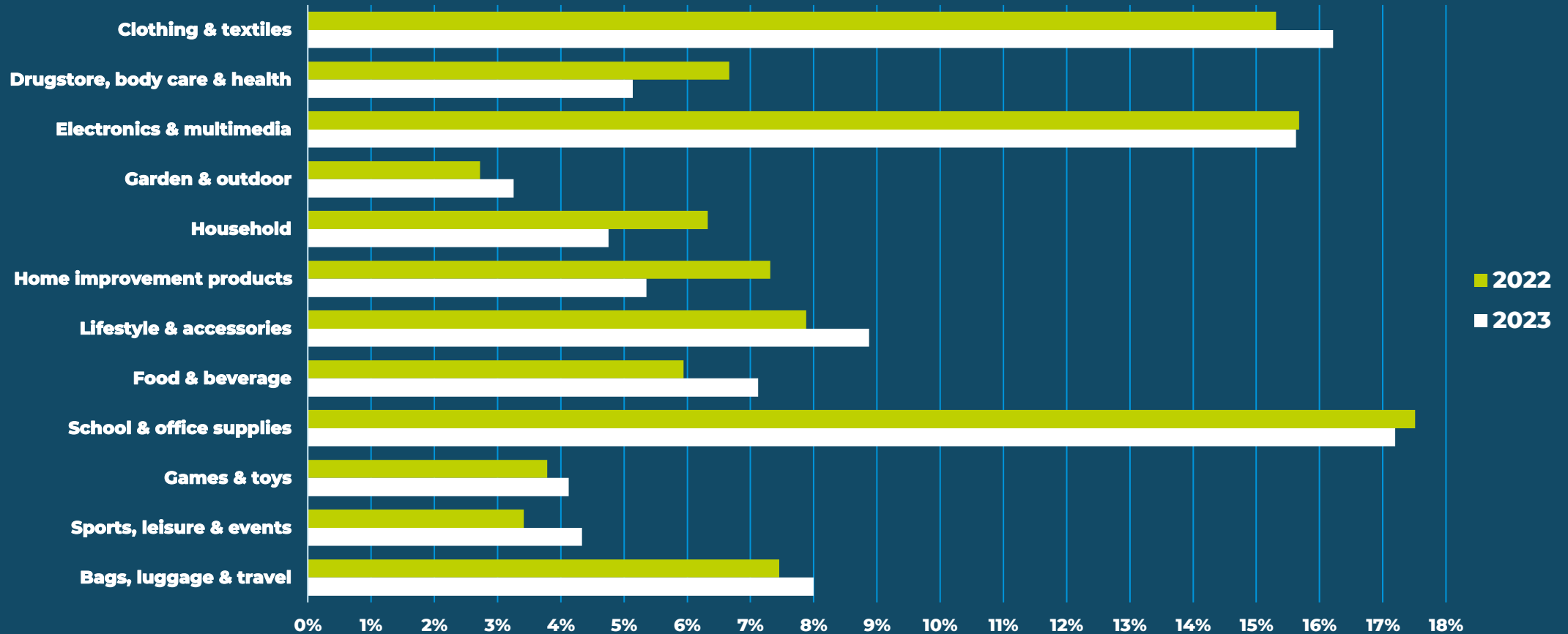
Germany – 2022

3,689	Total
847	0 to 9 employees
489	10 to 19 employees
390	20 to 49 employees
1,040	50 to 249 employees
923	250 or more employees

Germany – 2023

4,003	Total
932	0 to 9 employees
495	10 to 19 employees
417	20 to 49 employees
1,144	50 to 249 employees
1,015	250 or more employees

Product segments: Allocation of spendings %

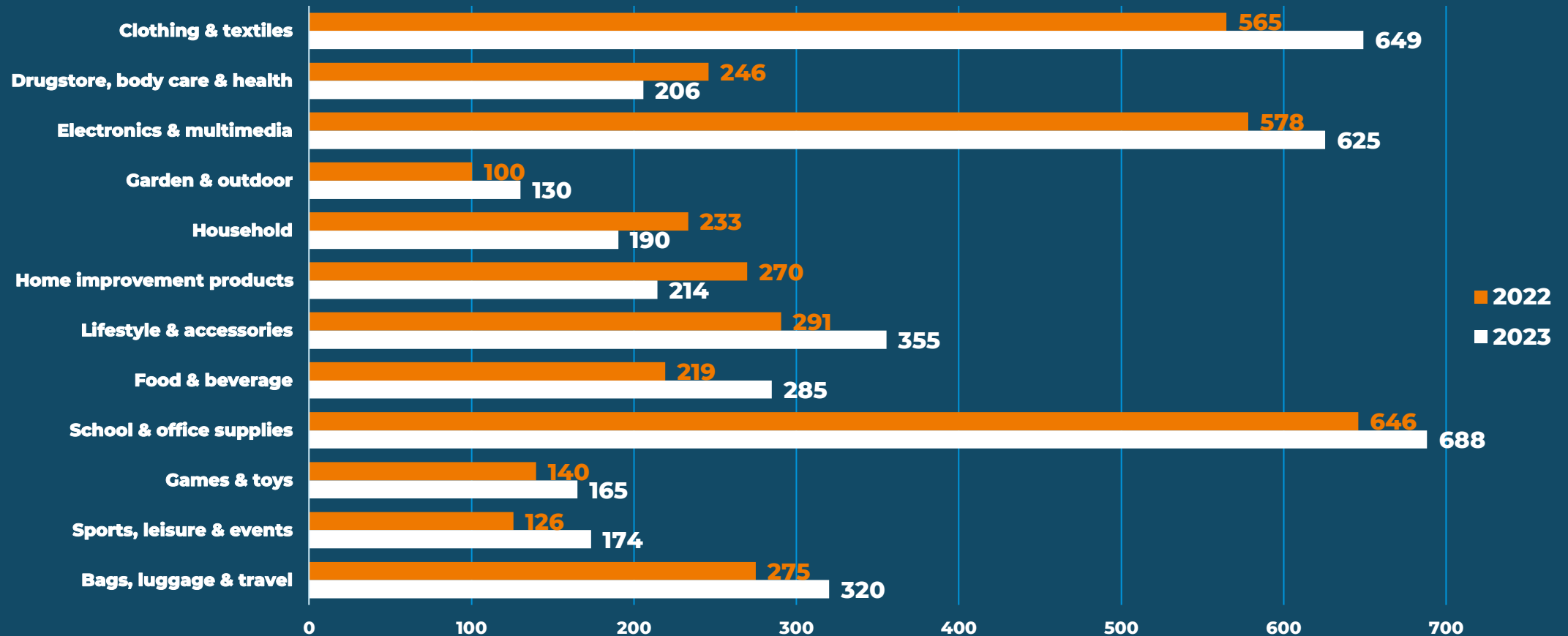


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



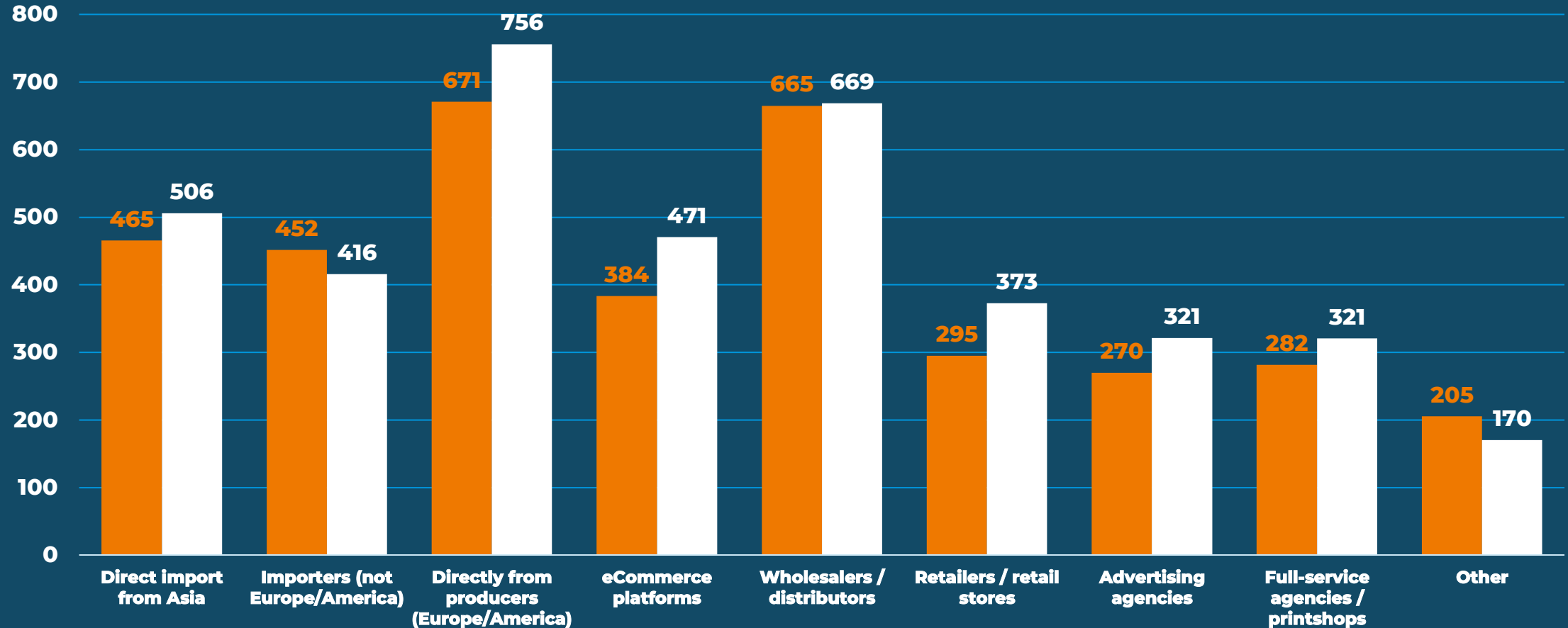
Purchase Channel: Allocation in %



Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro



Products - Importance of characteristics

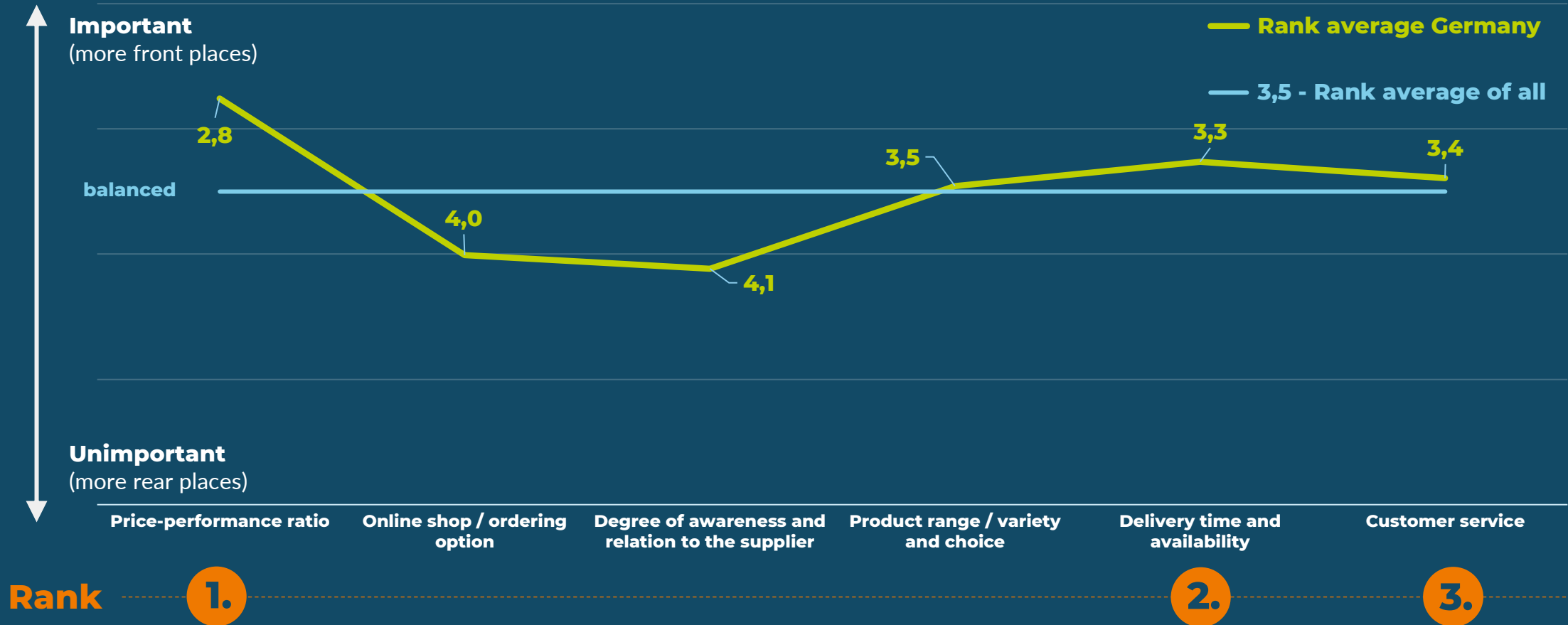
Ranking from place 1 to 8



Question:

How important are the following characteristics for your company when choosing promotional product? Please rank characteristics:

Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

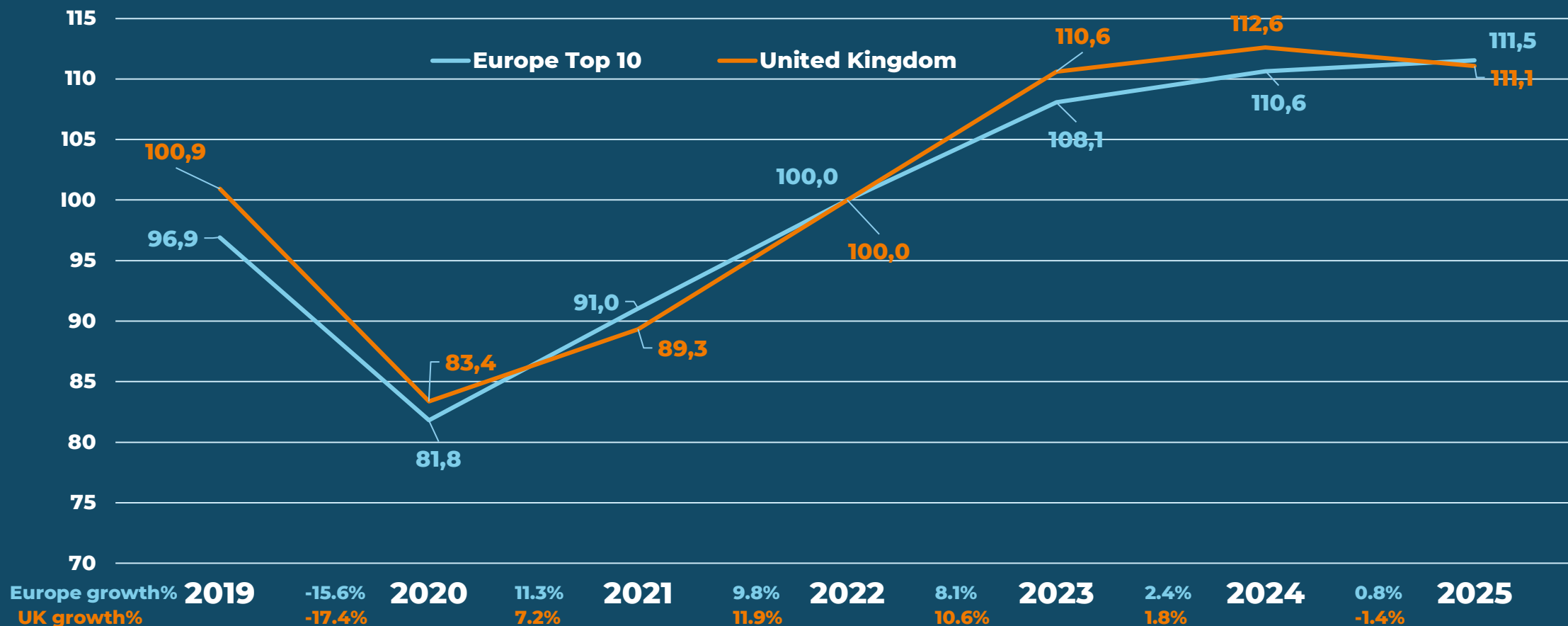
Das Who und
How der Branche.
Mein PSI.

United Kingdom



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

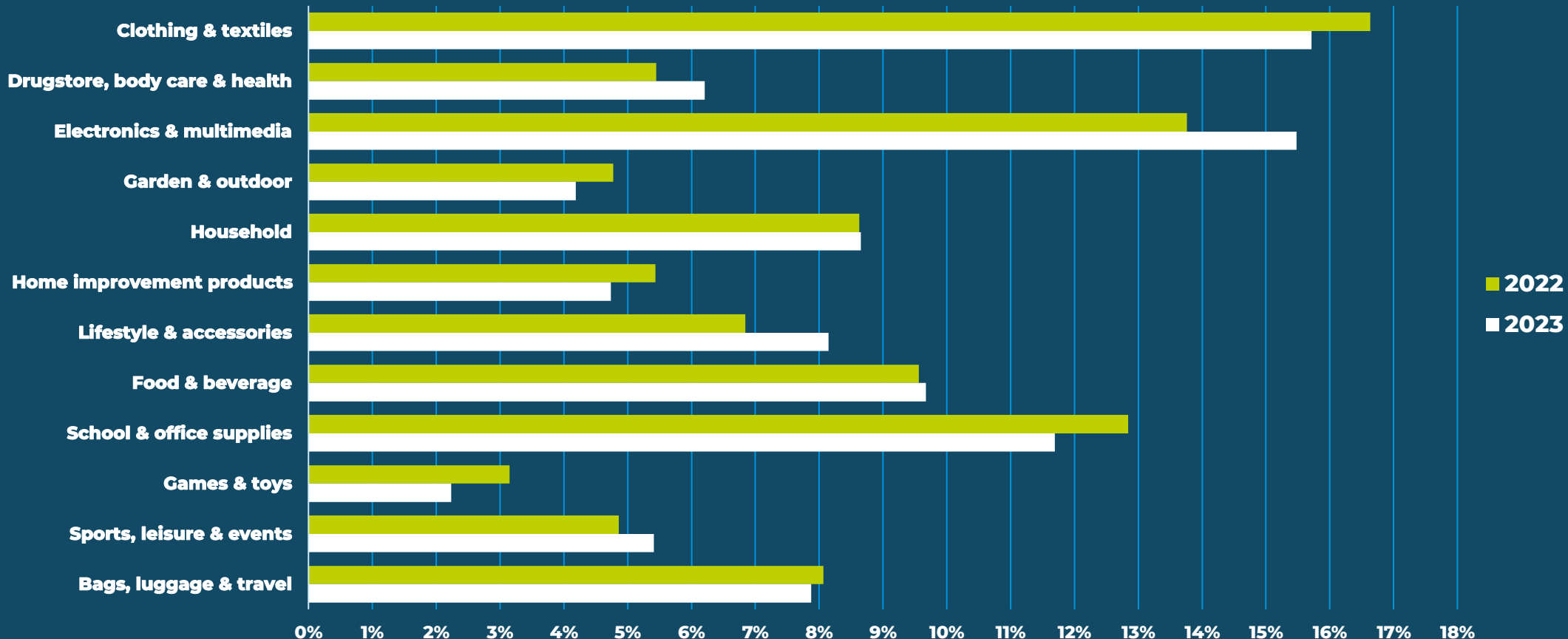
United Kingdom – 2022

1,494	Total
389	0 to 9 employees
151	10 to 19 employees
164	20 to 49 employees
399	50 to 249 employees
390	250 or more employees

United Kingdom – 2023

1,653	Total
417	0 to 9 employees
178	10 to 19 employees
180	20 to 49 employees
432	50 to 249 employees
446	250 or more employees

Product segments: Allocation

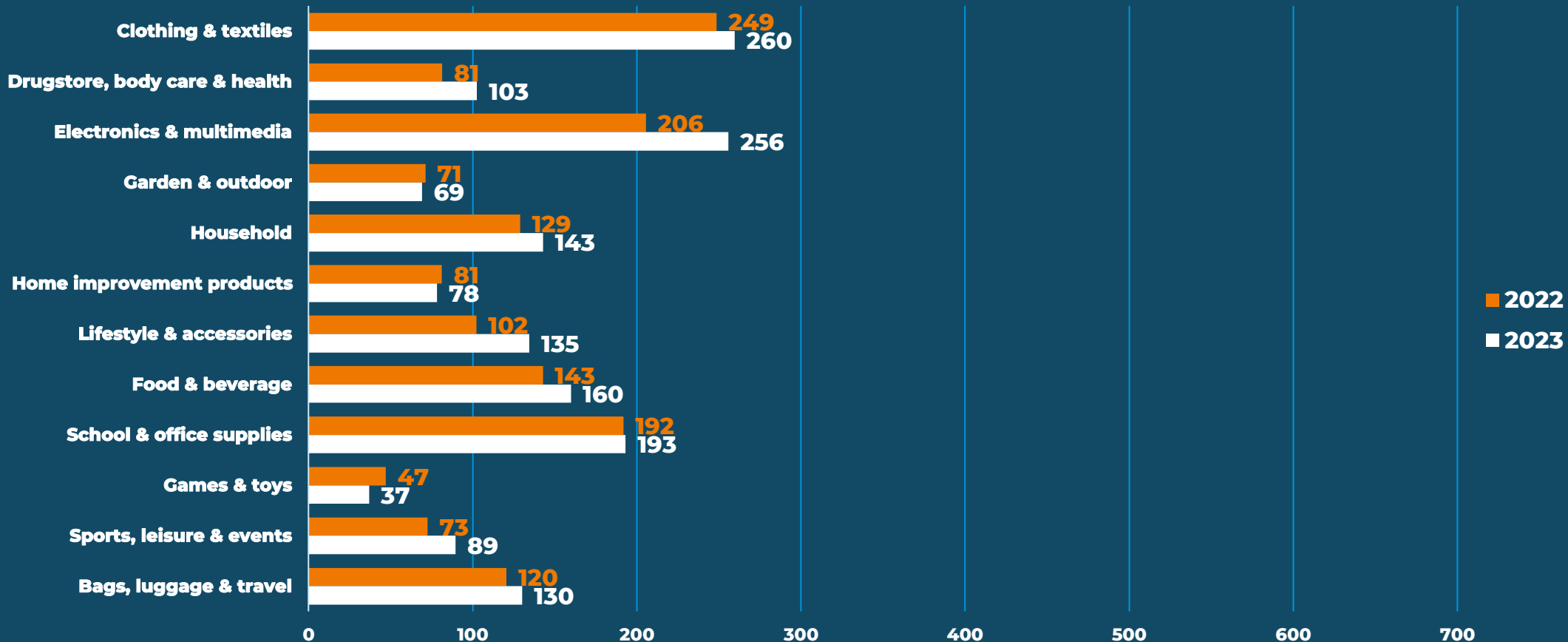


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



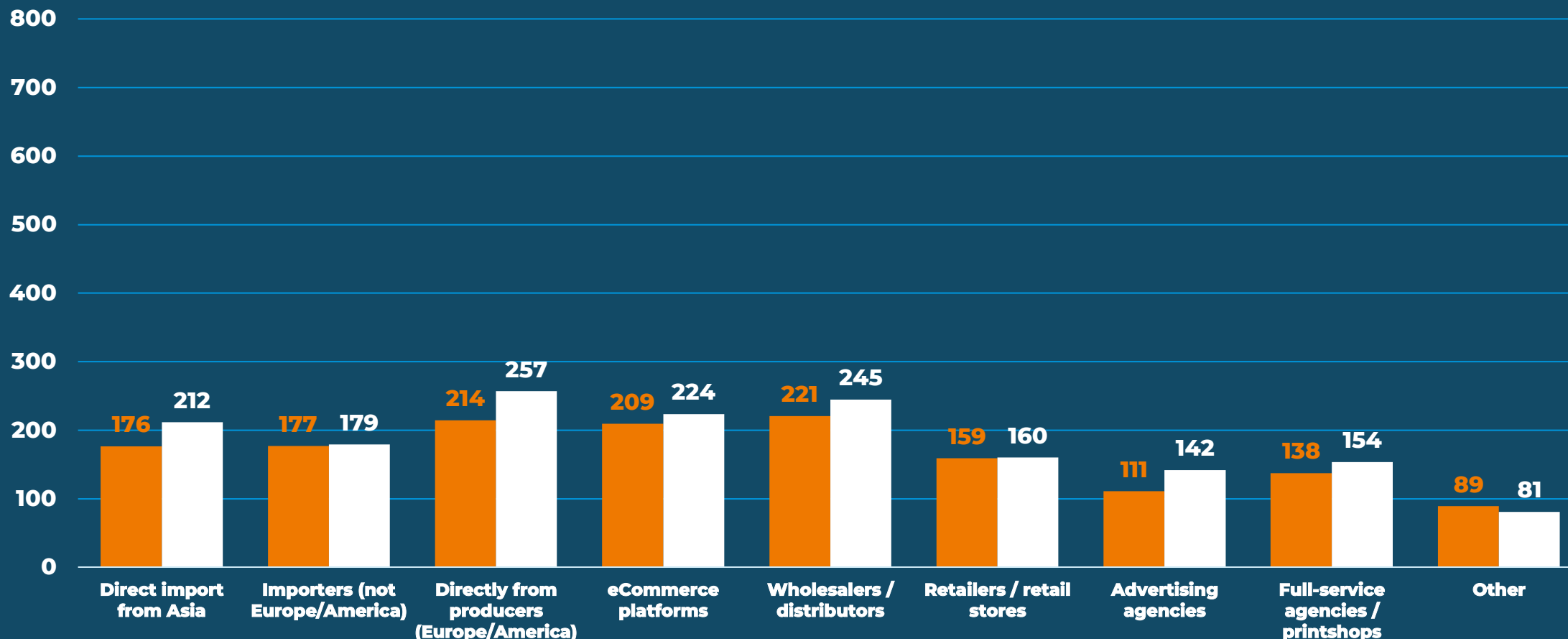
Purchase Channel: Allocation in %



Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro

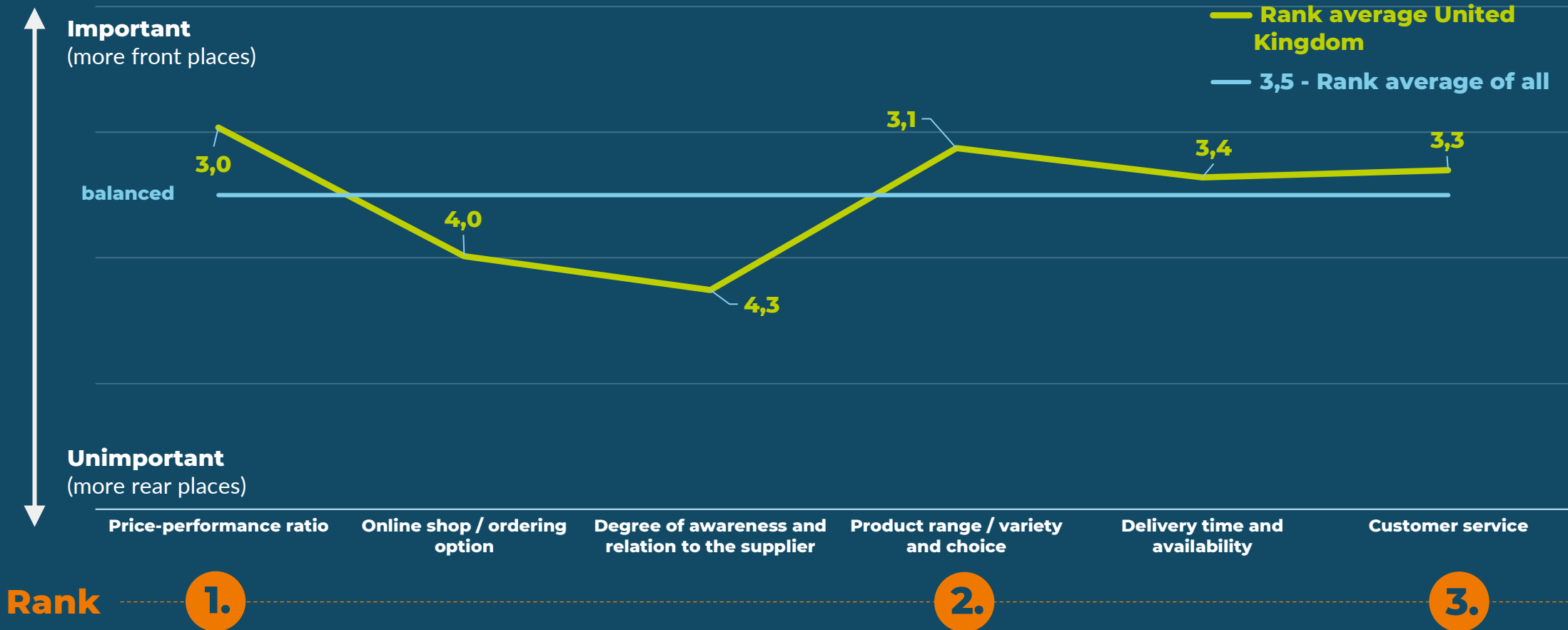


Products - Importance of characteristics

Ranking from place 1 to 8



Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

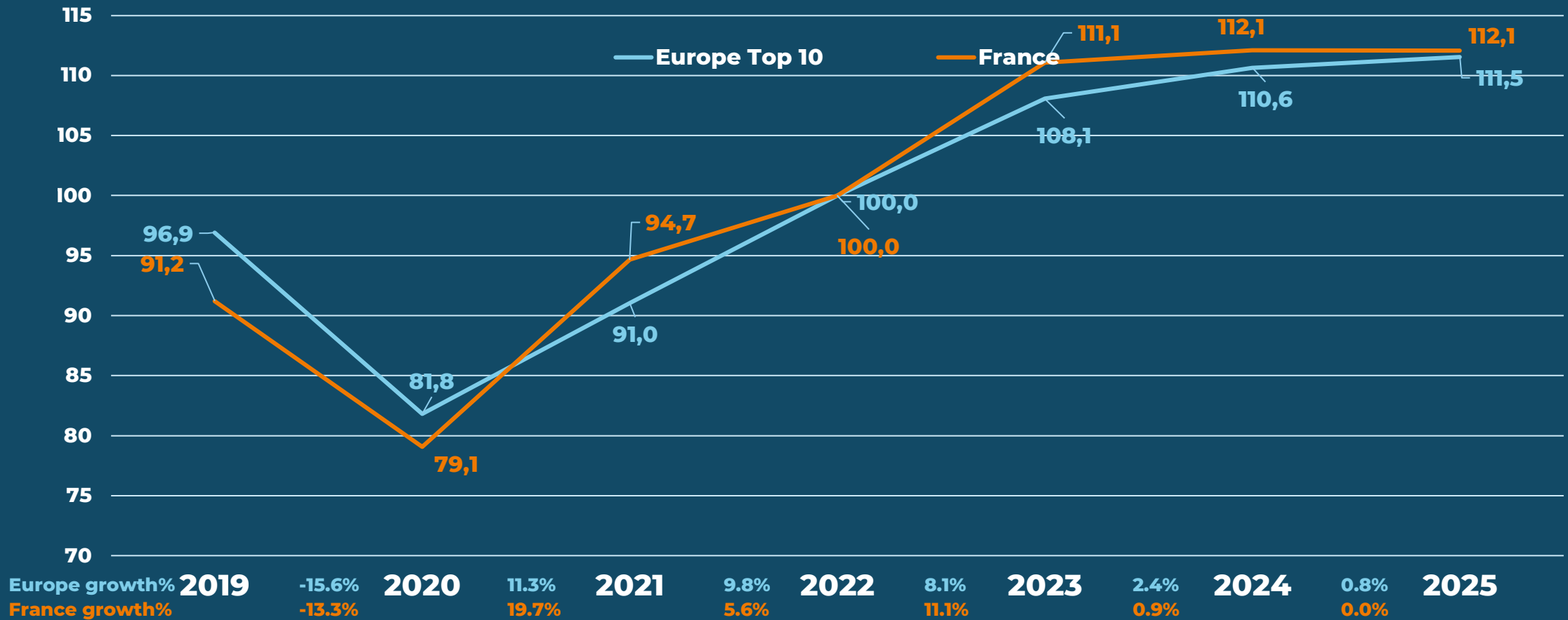
Das Who und
How der Branche.
Mein PSI.

France



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

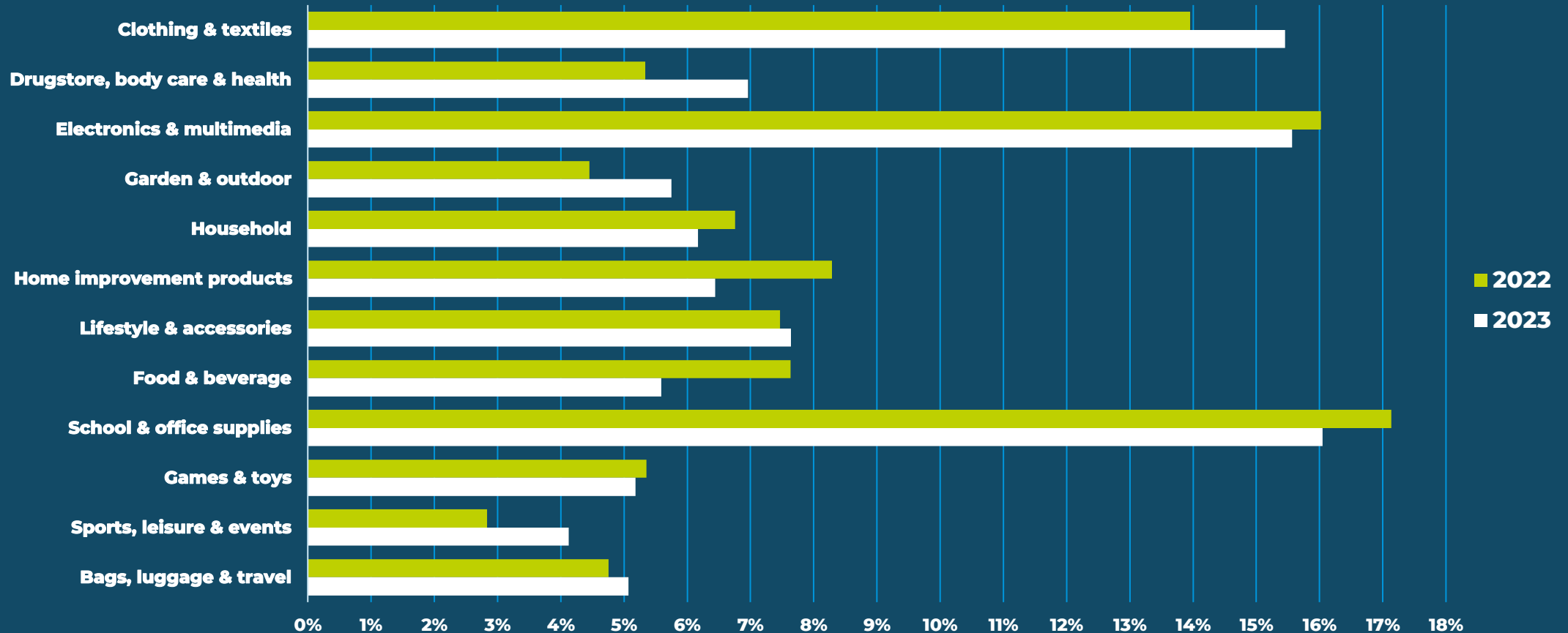
France – 2022

1,744	Total
825	0 to 9 employees
130	10 to 19 employees
172	20 to 49 employees
331	50 to 249 employees
286	250 or more employees

France – 2023

1,937	Total
887	0 to 9 employees
145	10 to 19 employees
202	20 to 49 employees
369	50 to 249 employees
335	250 or more employees

Product segments: Allocation

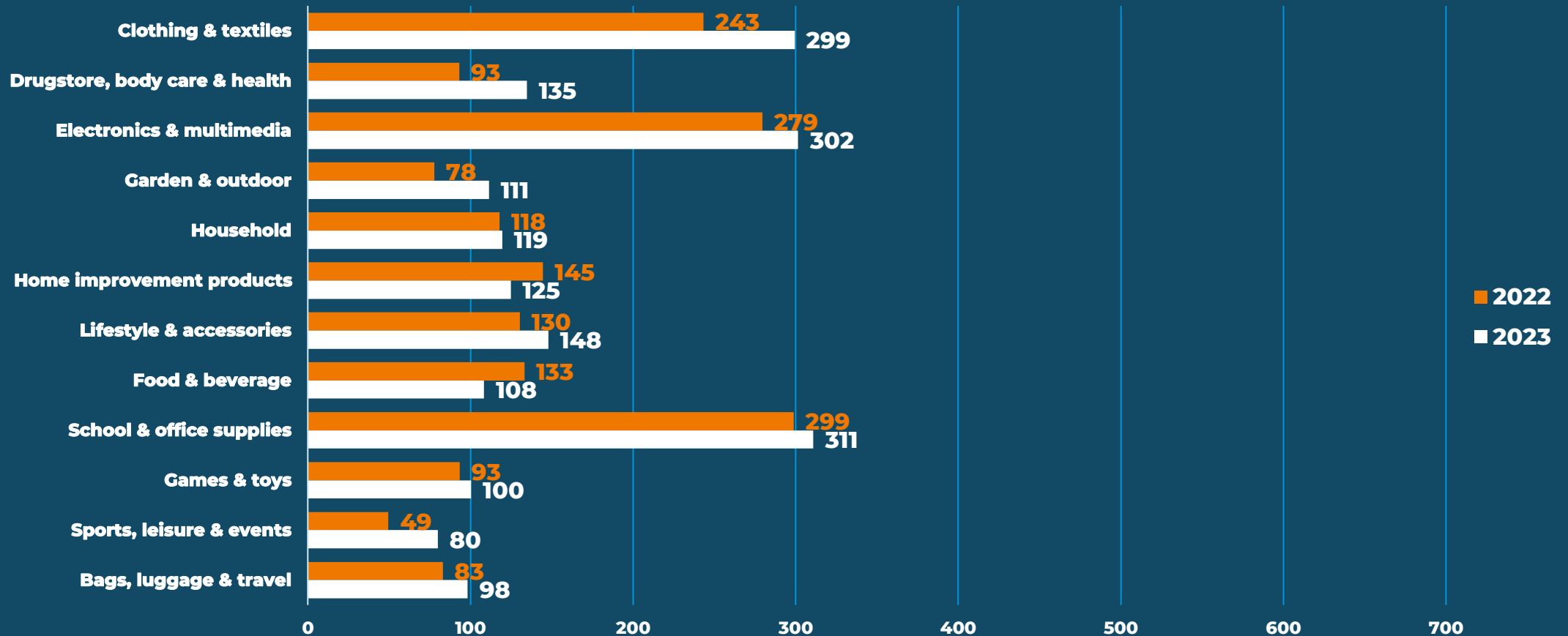


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



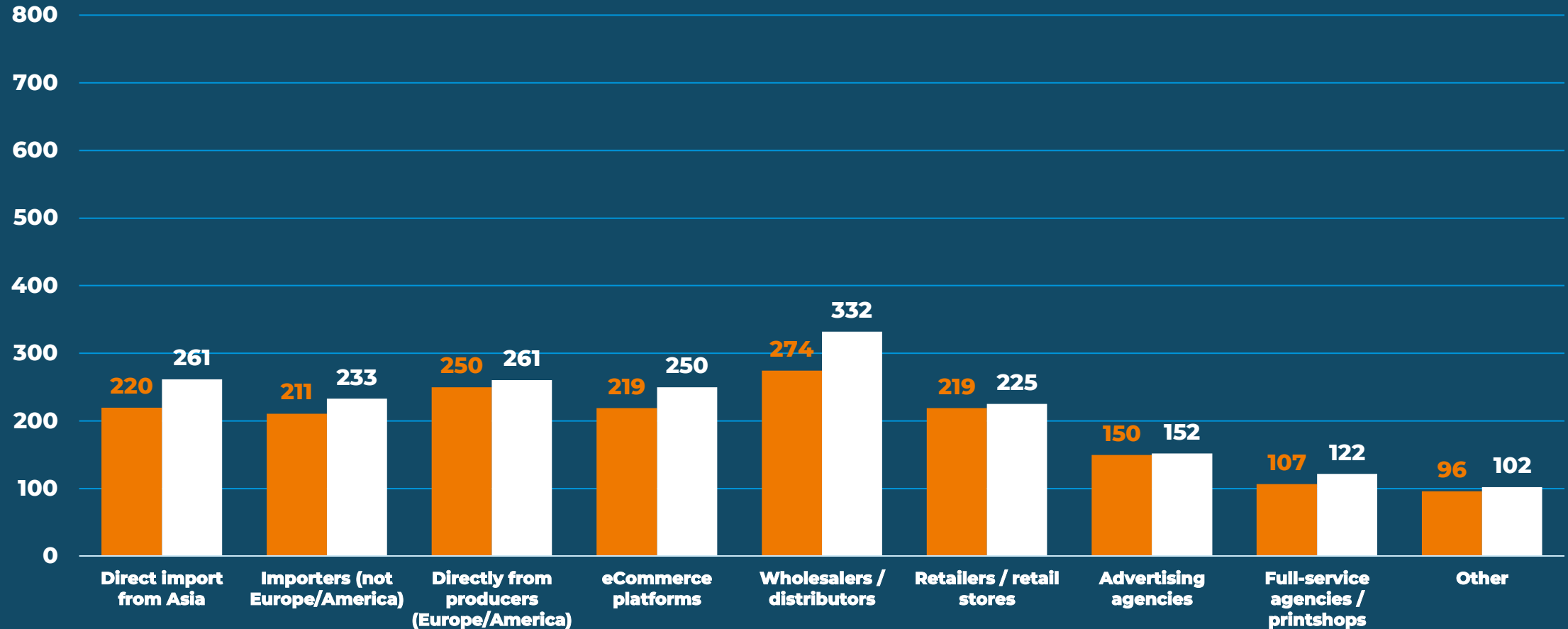
Purchase Channel: Allocation in %



Question:

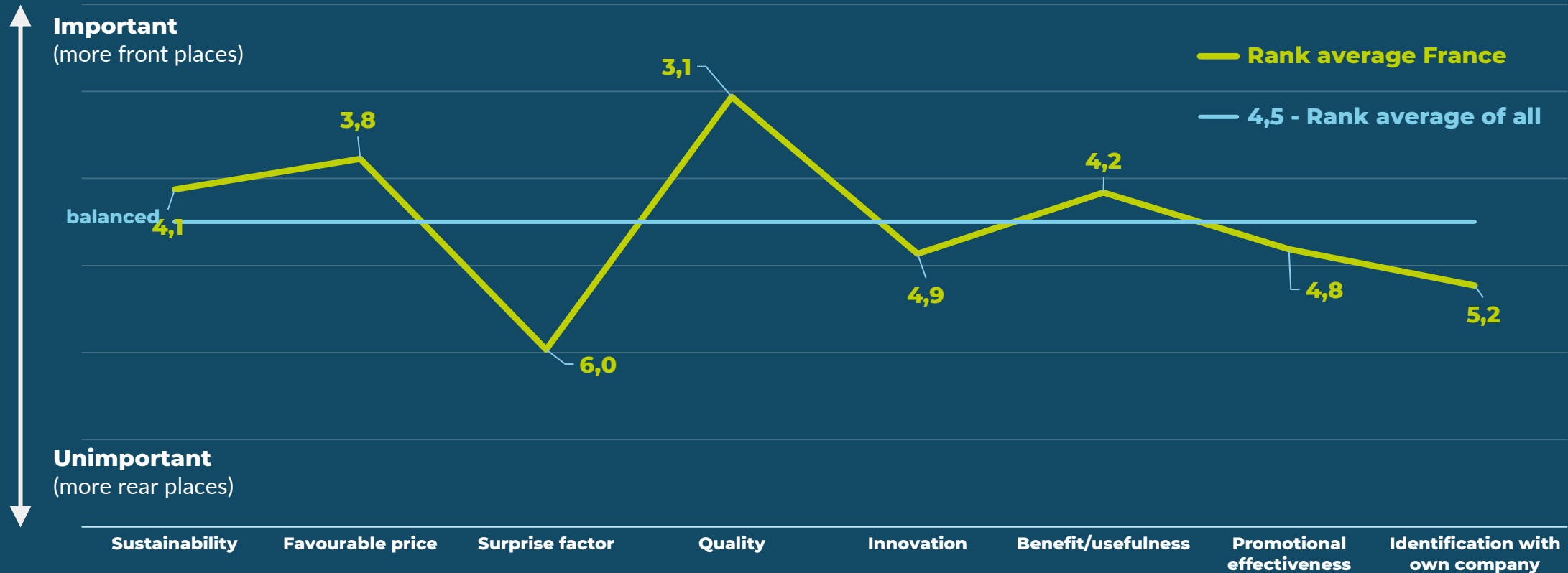
Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro



Products - Importance of characteristics

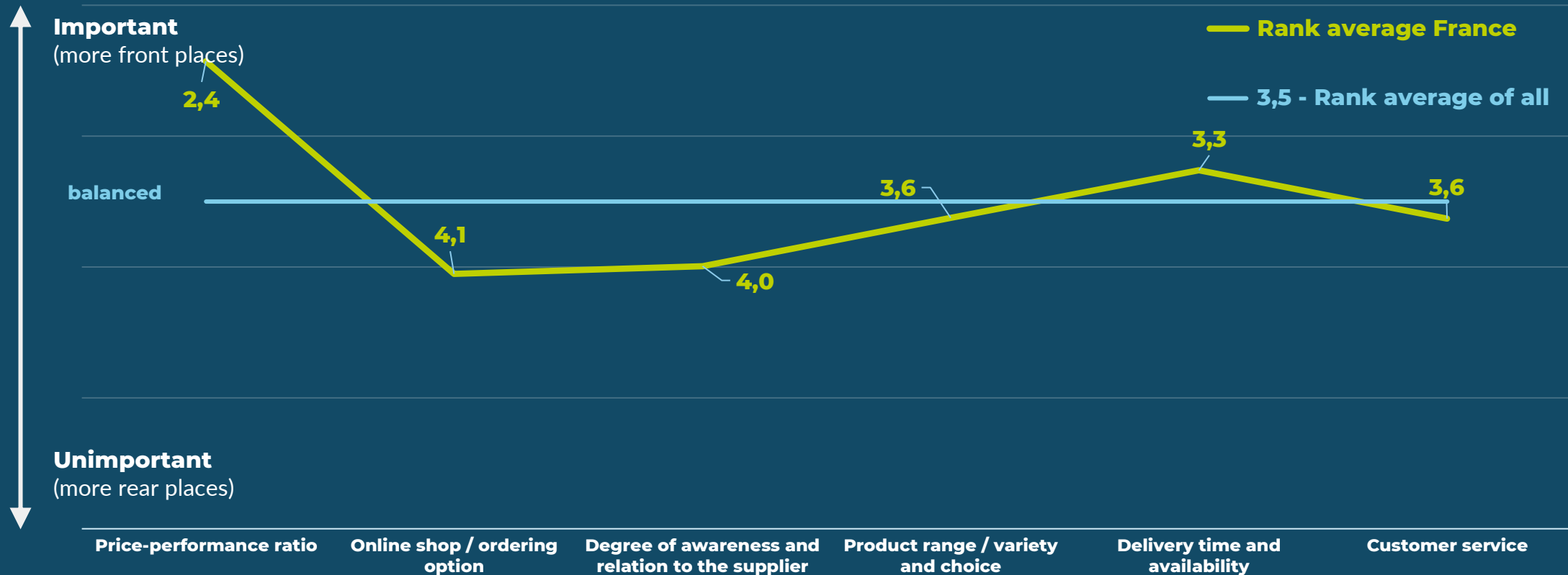
Ranking from place 1 to 8



Question:

How important are the following characteristics for your company when choosing promotional product? Please rank characteristics:

Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

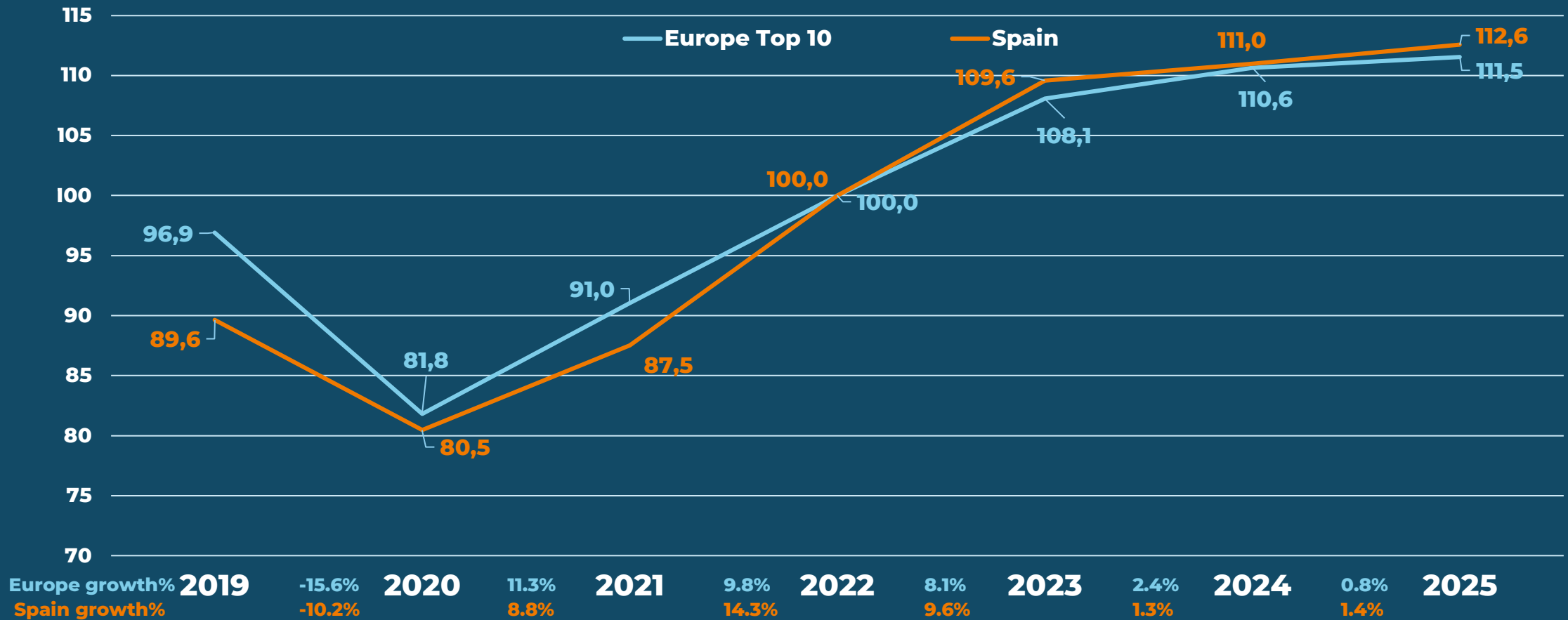
Das Who und
How der Branche.
Mein PSI.

Spain



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

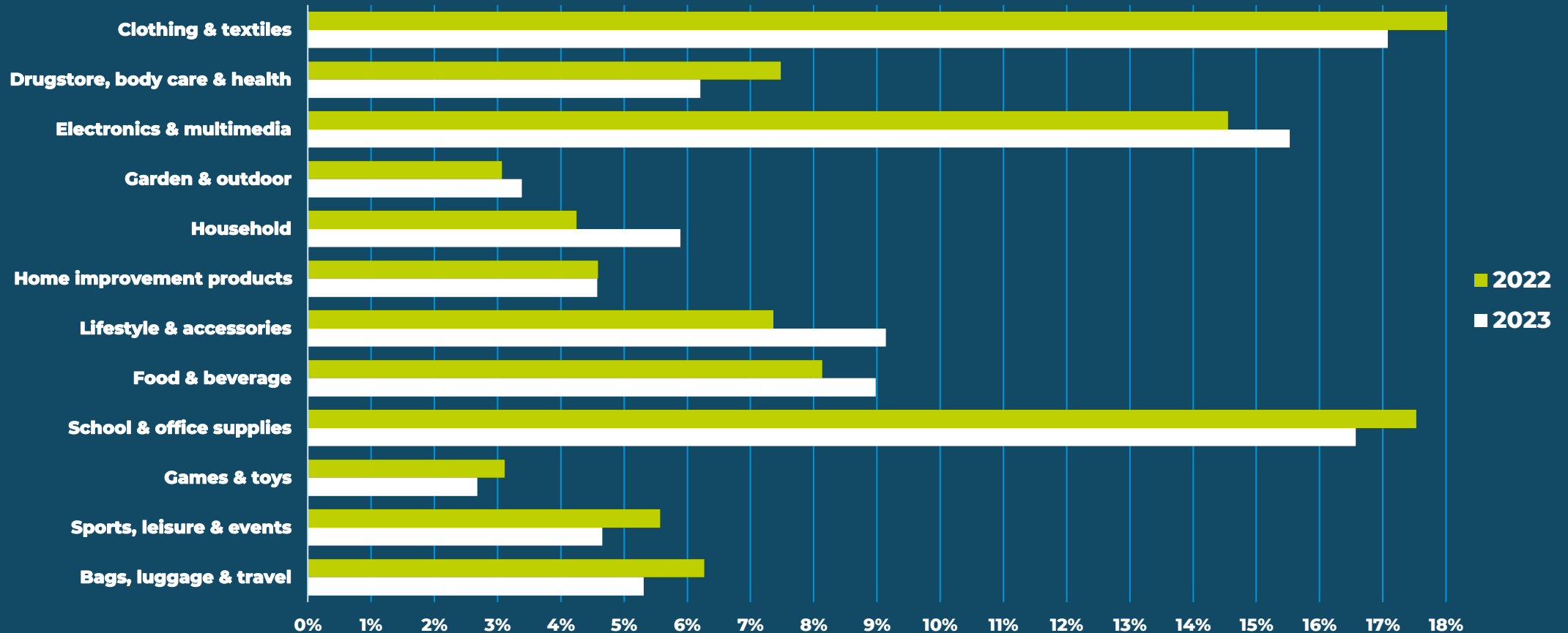
Spain – 2022

1,166	Total
661	0 to 9 employees
87	10 to 19 employees
66	20 to 49 employees
185	50 to 249 employees
168	250 or more employees

Spain – 2023

1,278	Total
727	0 to 9 employees
93	10 to 19 employees
68	20 to 49 employees
213	50 to 249 employees
177	250 or more employees

Product segments: Allocation

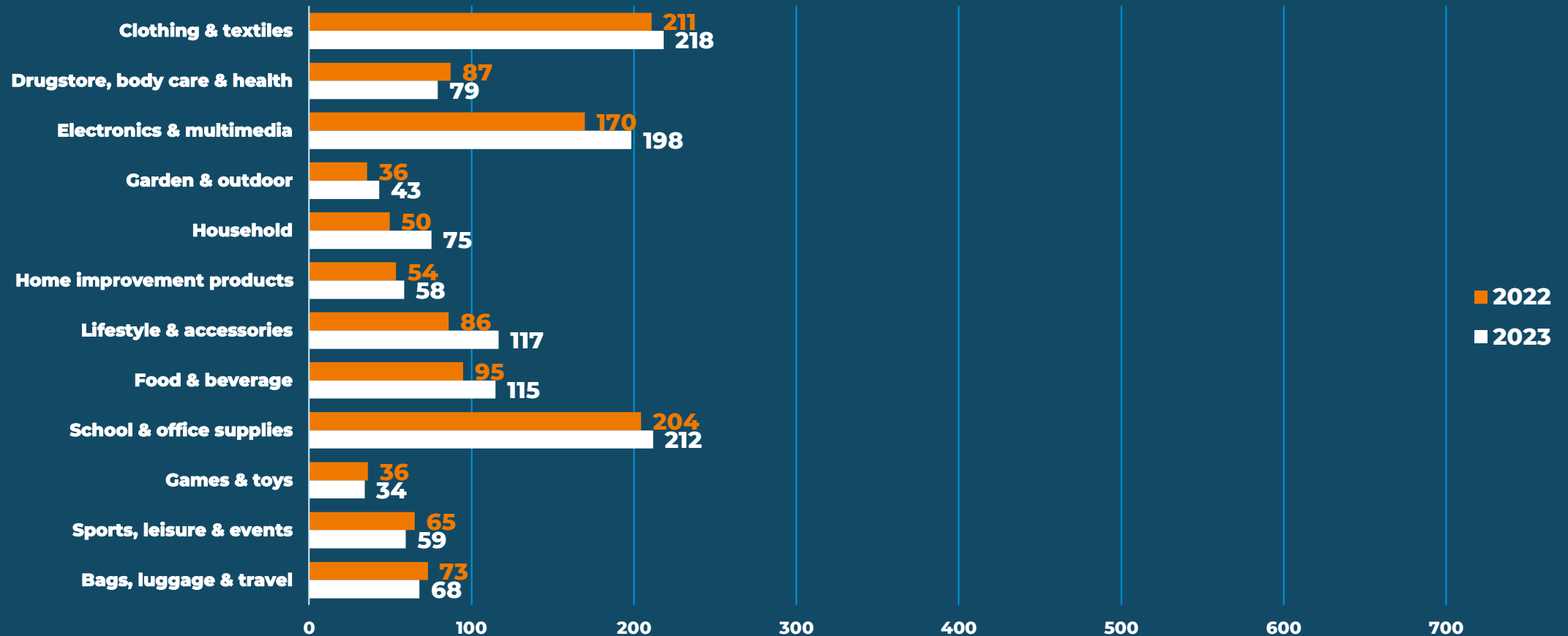


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



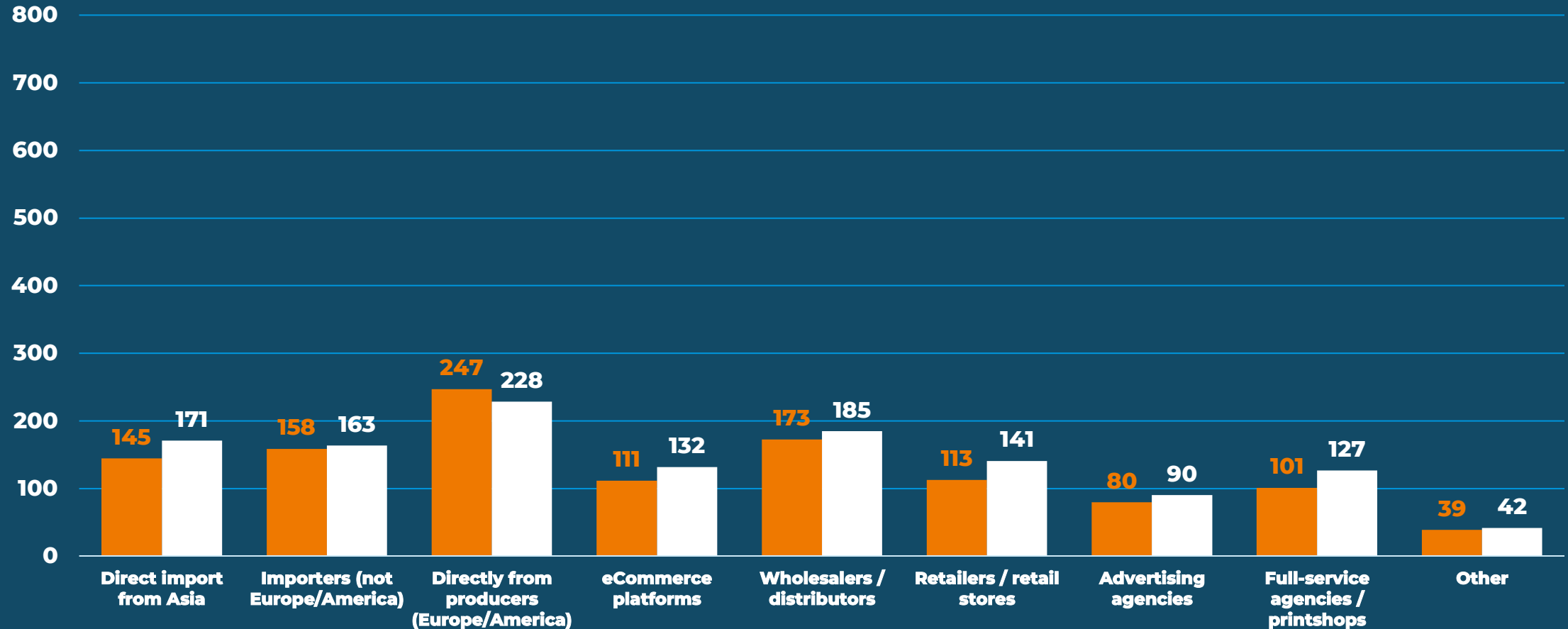
Purchase Channel: Allocation in %



Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro



Products - Importance of characteristics

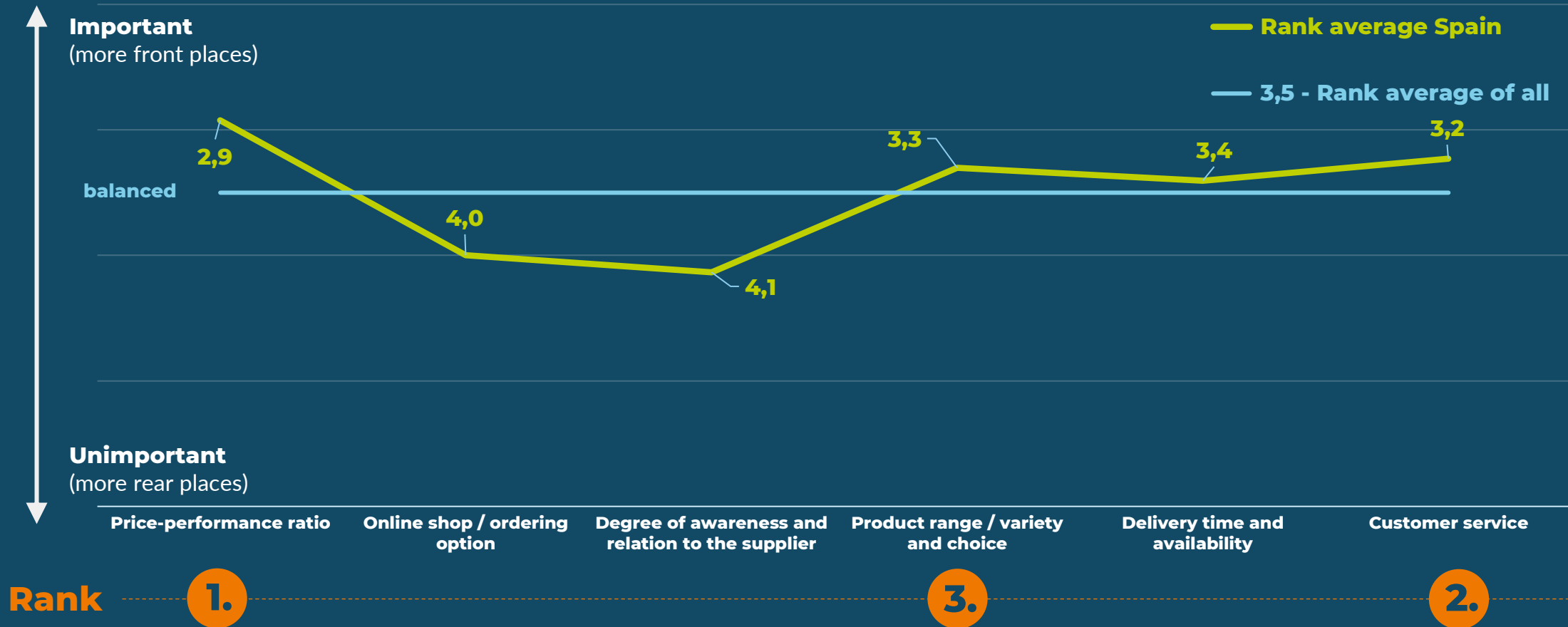
Ranking from place 1 to 8



Question:

How important are the following characteristics for your company when choosing promotional product? Please rank characteristics:

Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

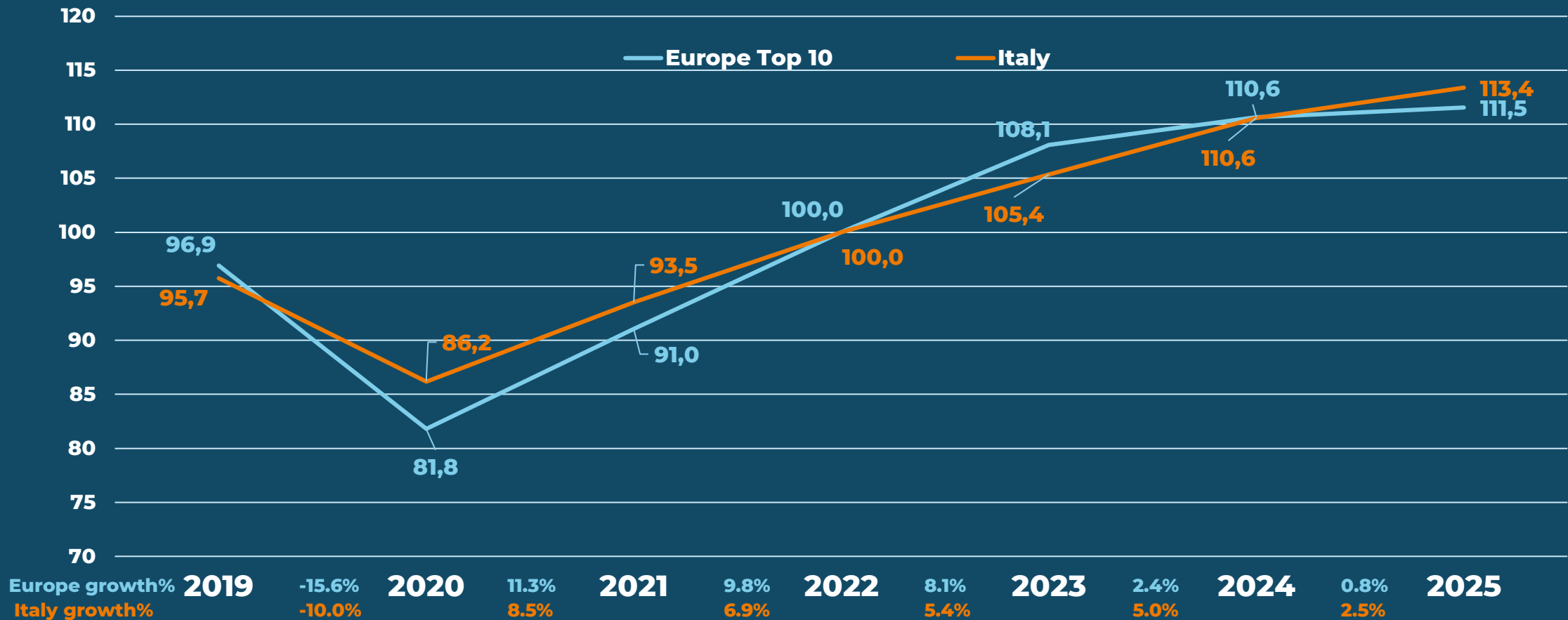
Das Who und
How der Branche.
Mein PSI.

Italy



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

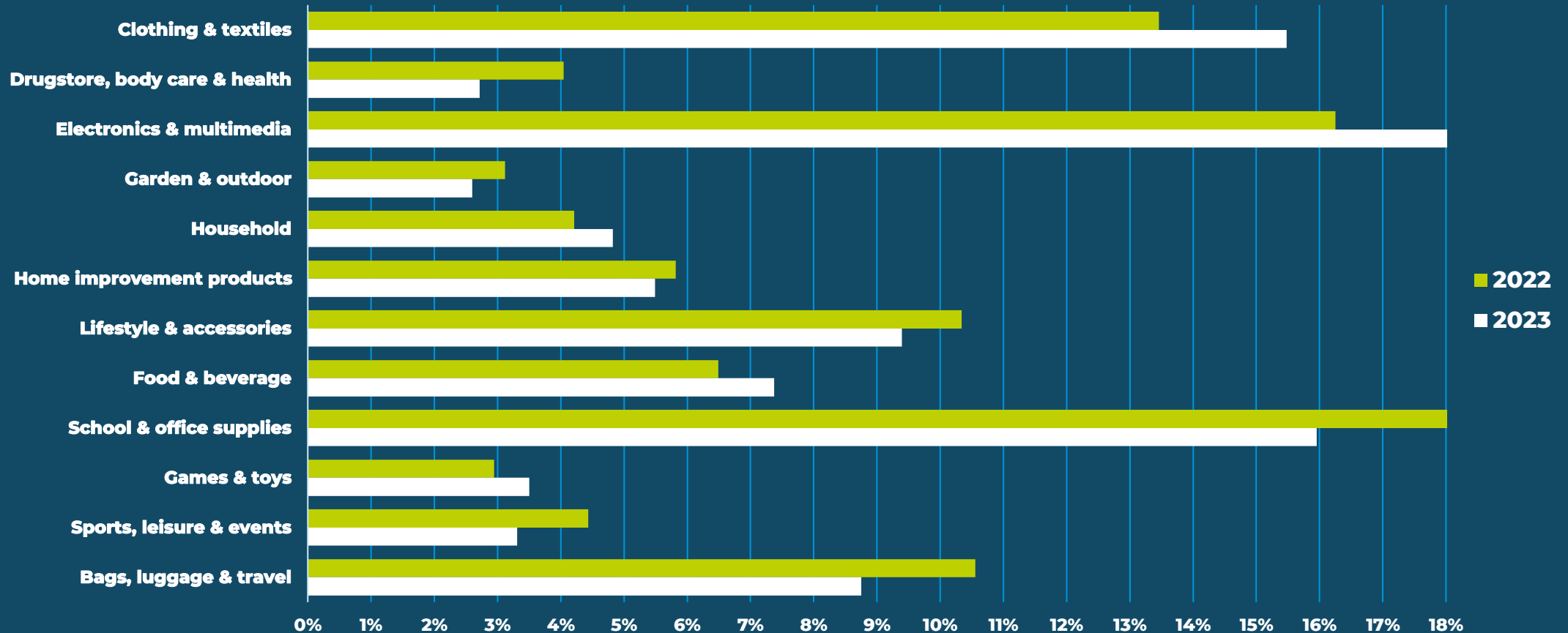
Italy – 2022

1,392	Total
781	0 to 9 employees
121	10 to 19 employees
107	20 to 49 employees
236	50 to 249 employees
147	250 or more employees

Italy – 2023

1,466	Total
818	0 to 9 employees
117	10 to 19 employees
122	20 to 49 employees
242	50 to 249 employees
167	250 or more employees

Product segments: Allocation

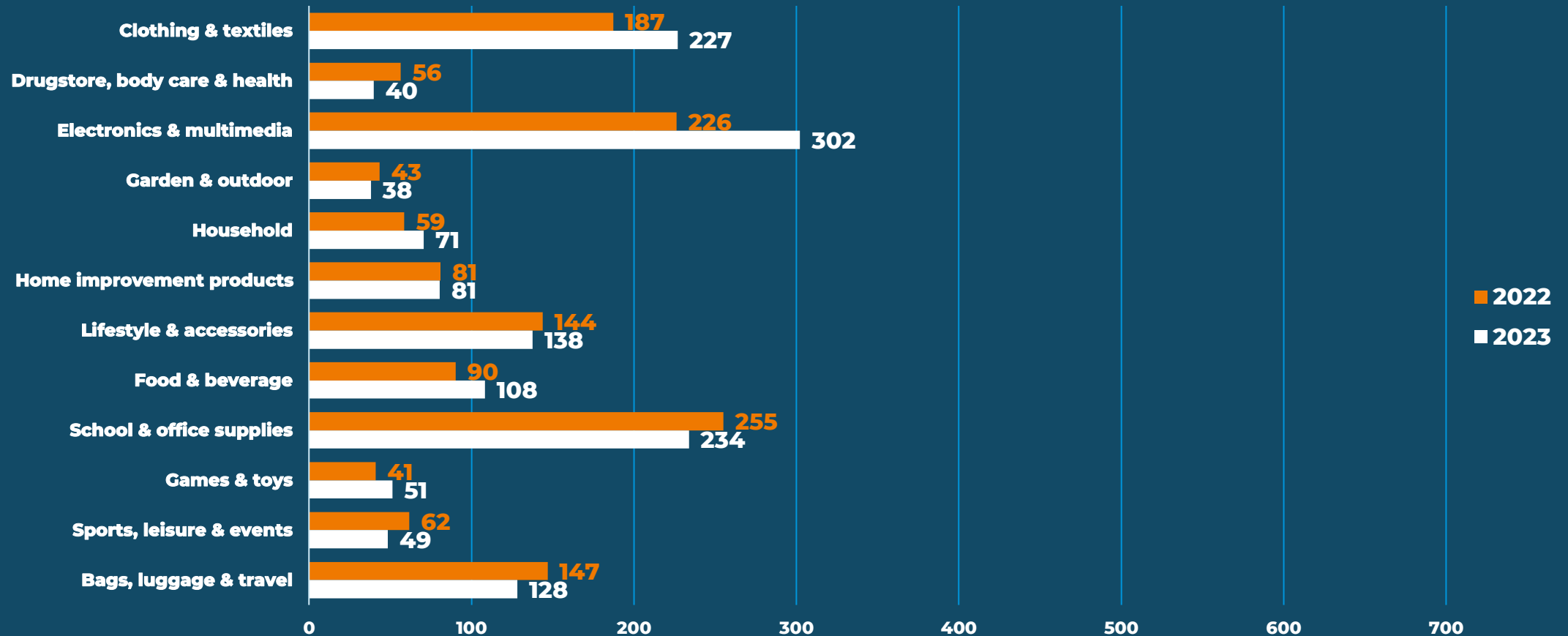


Question:

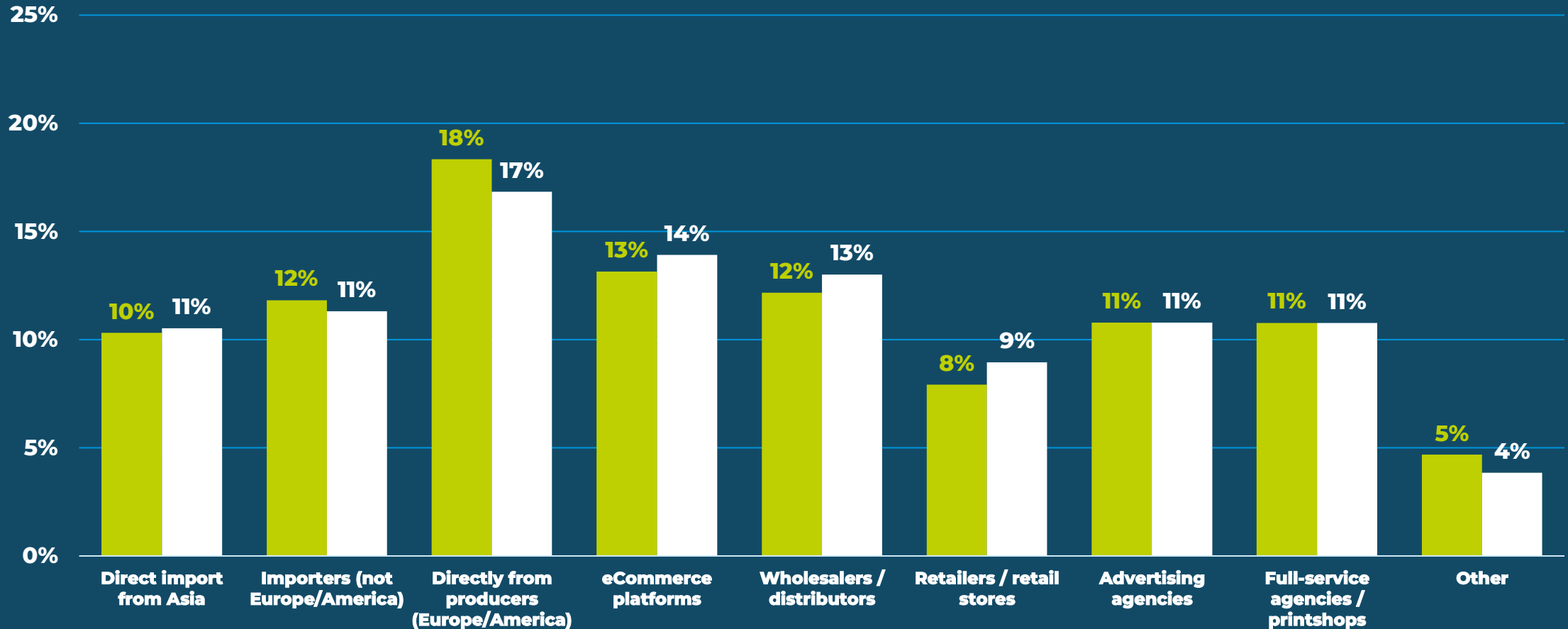
What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



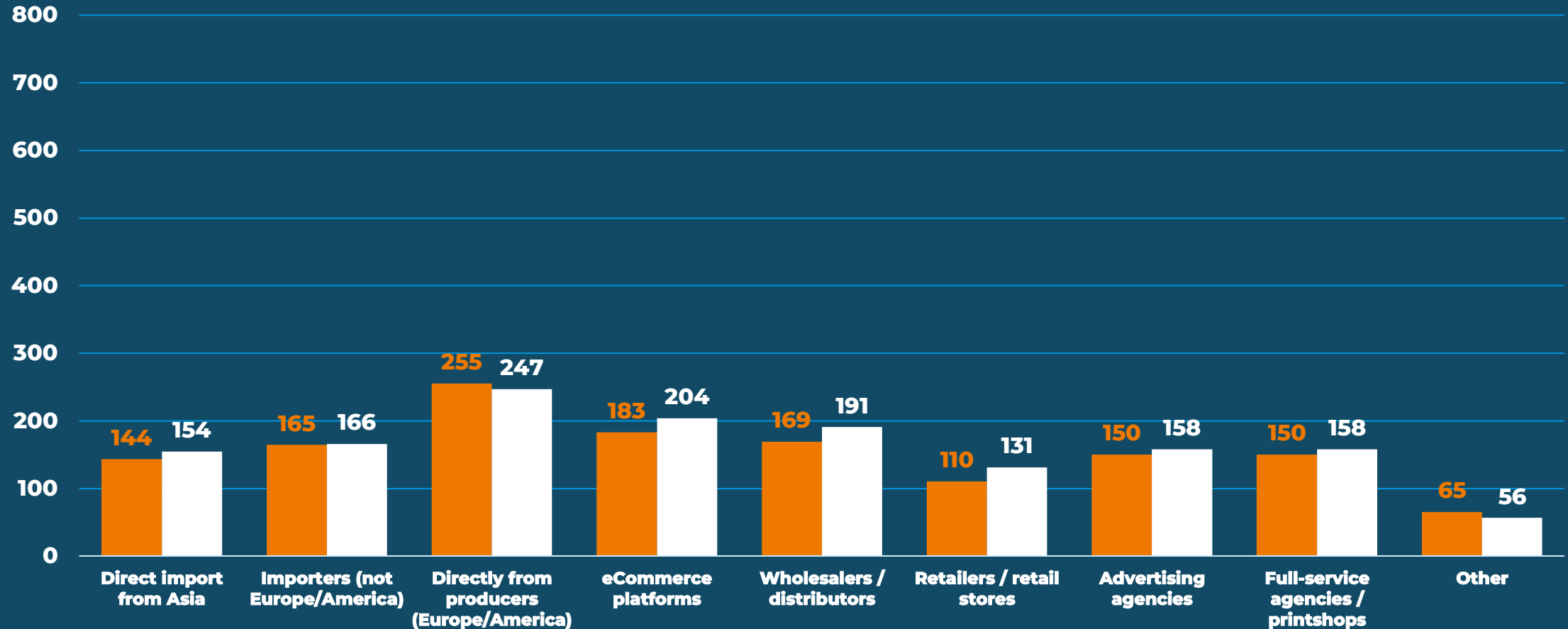
Purchase Channel: Allocation in %



Question:

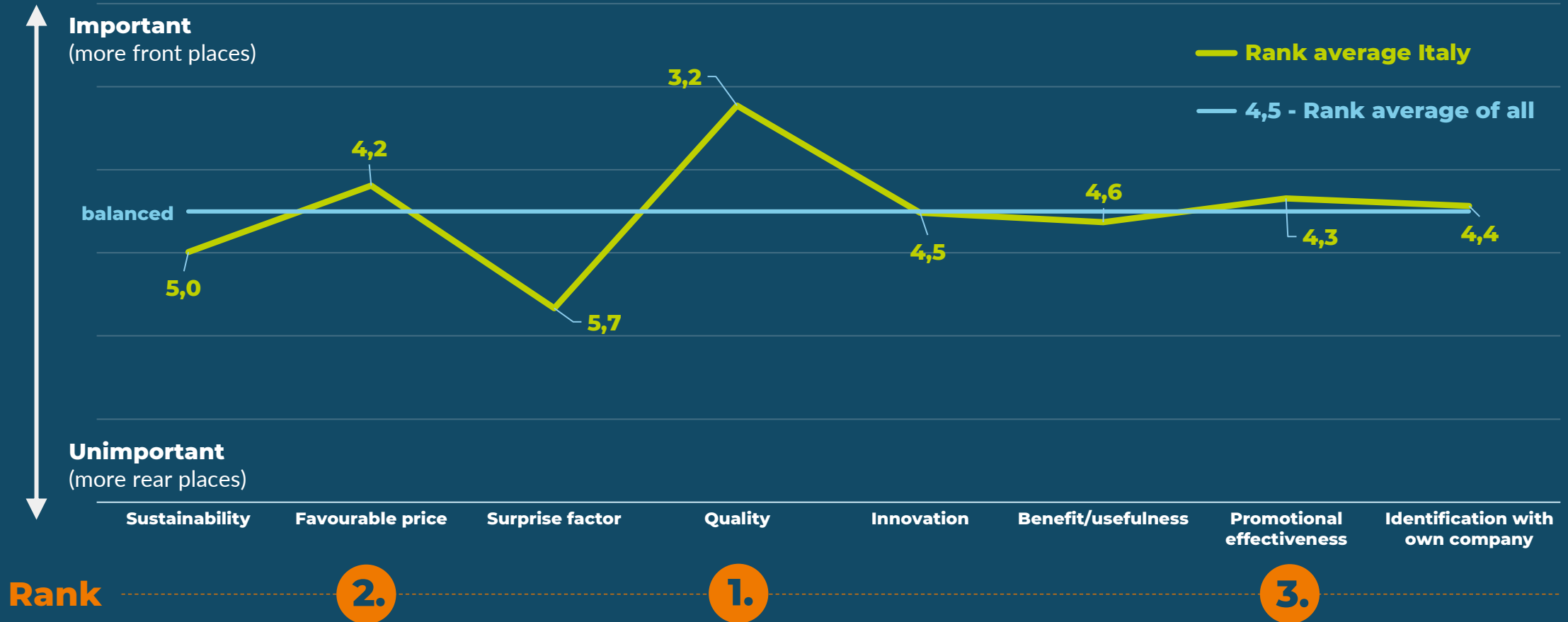
Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro



Products - Importance of characteristics

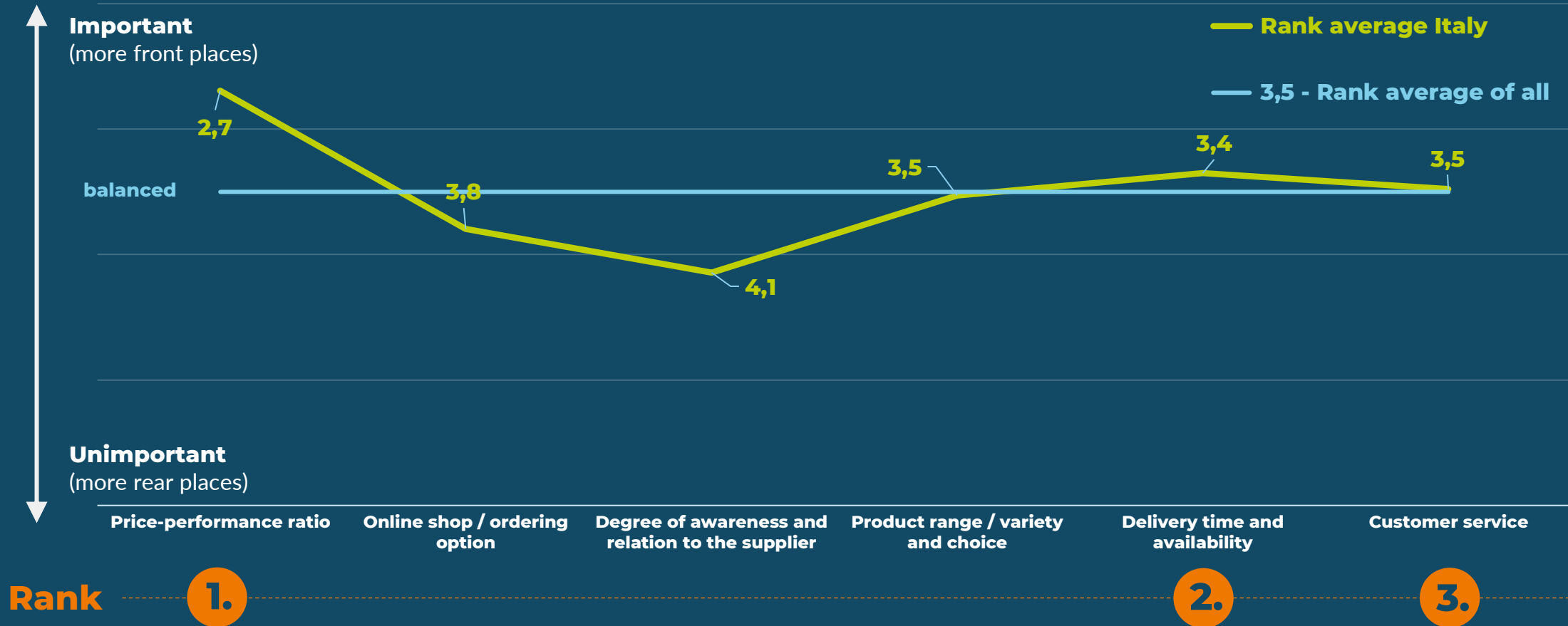
Ranking from place 1 to 8



Question:

How important are the following characteristics for your company when choosing promotional product? Please rank characteristics:

Provider - Importance of characteristics ranking from place 1 to 6



Question:

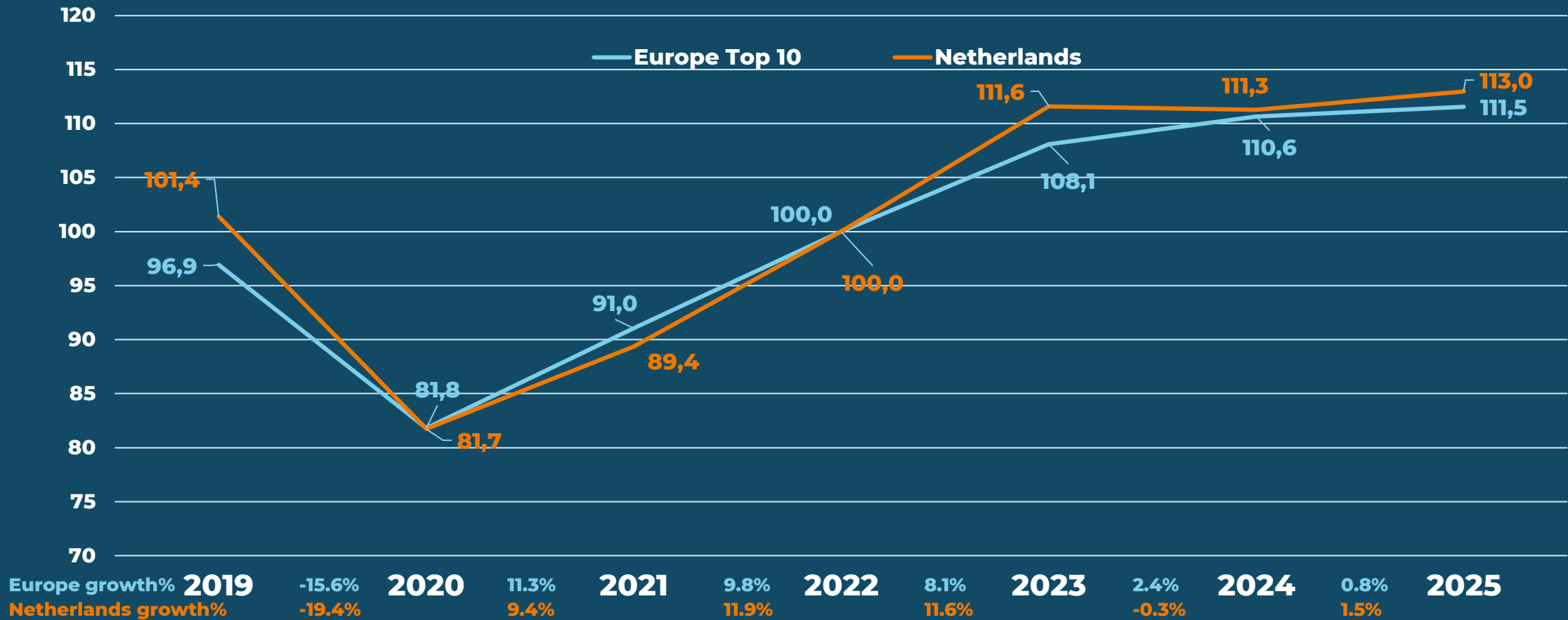
How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

Netherlands



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

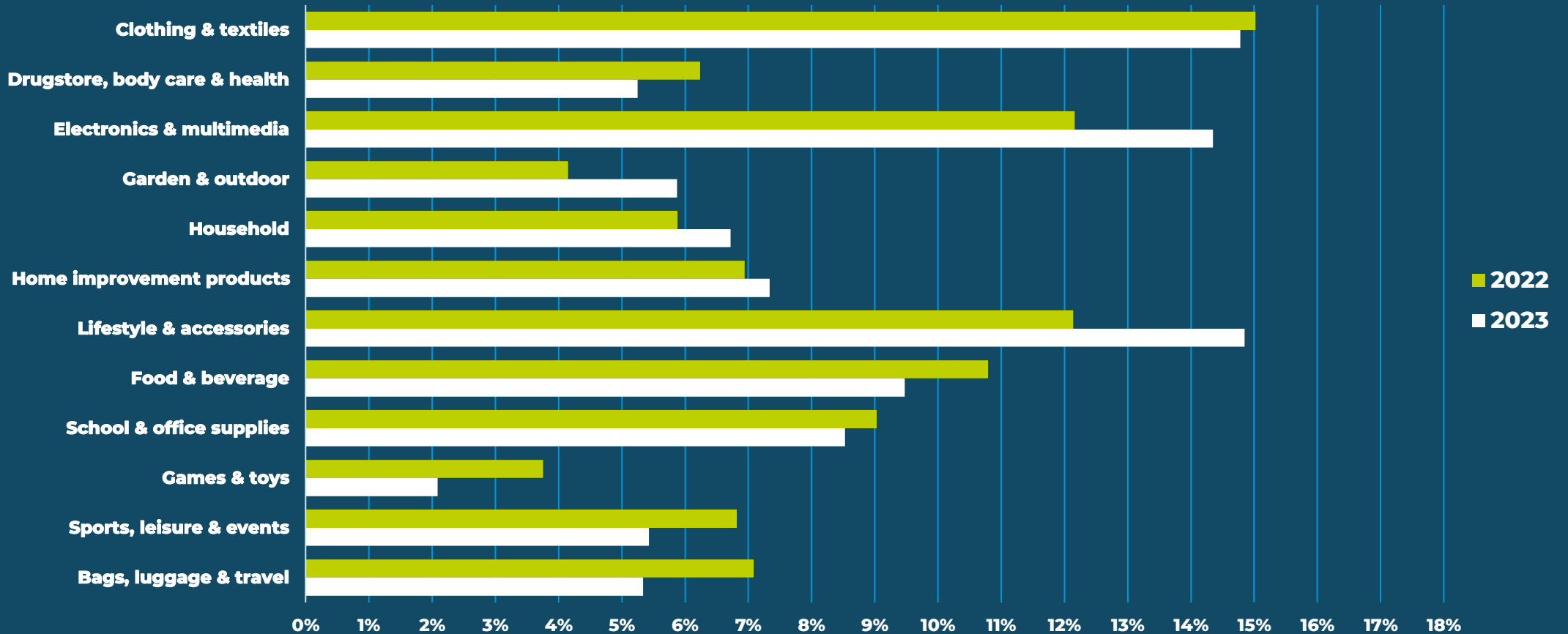
Netherlands – 2022

672	Total
336	0 to 9 employees
52	10 to 19 employees
64	20 to 49 employees
132	50 to 249 employees
88	250 or more employees

Netherlands – 2023

750	Total
380	0 to 9 employees
57	10 to 19 employees
69	20 to 49 employees
143	50 to 249 employees
101	250 or more employees

Product segments: Allocation

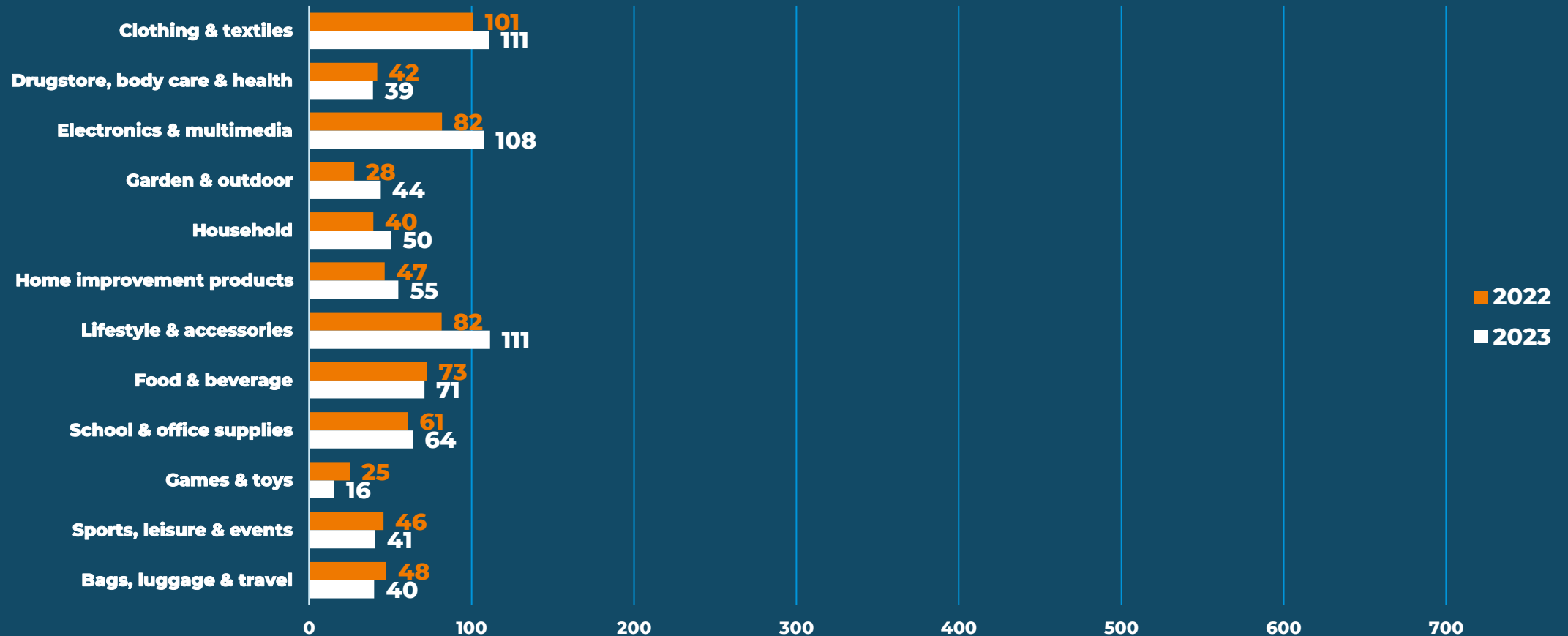


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



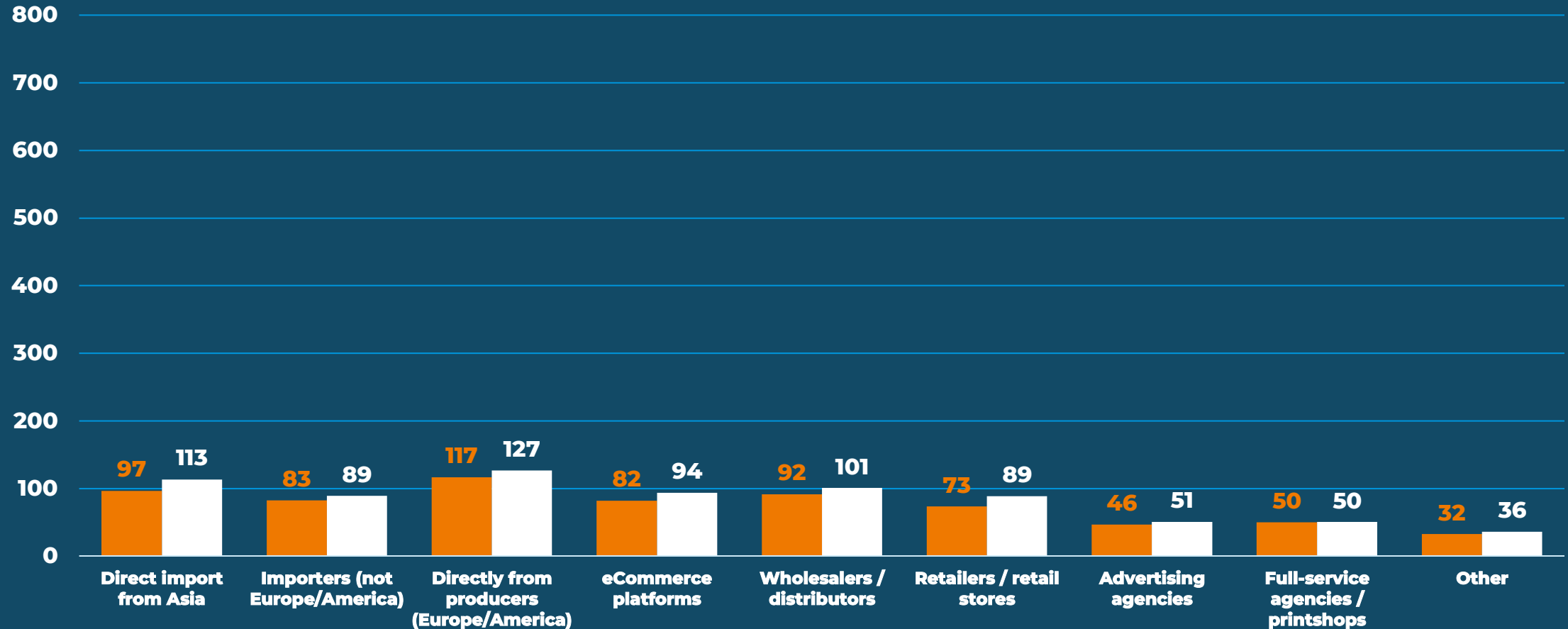
Purchase Channel: Allocation in %



Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro

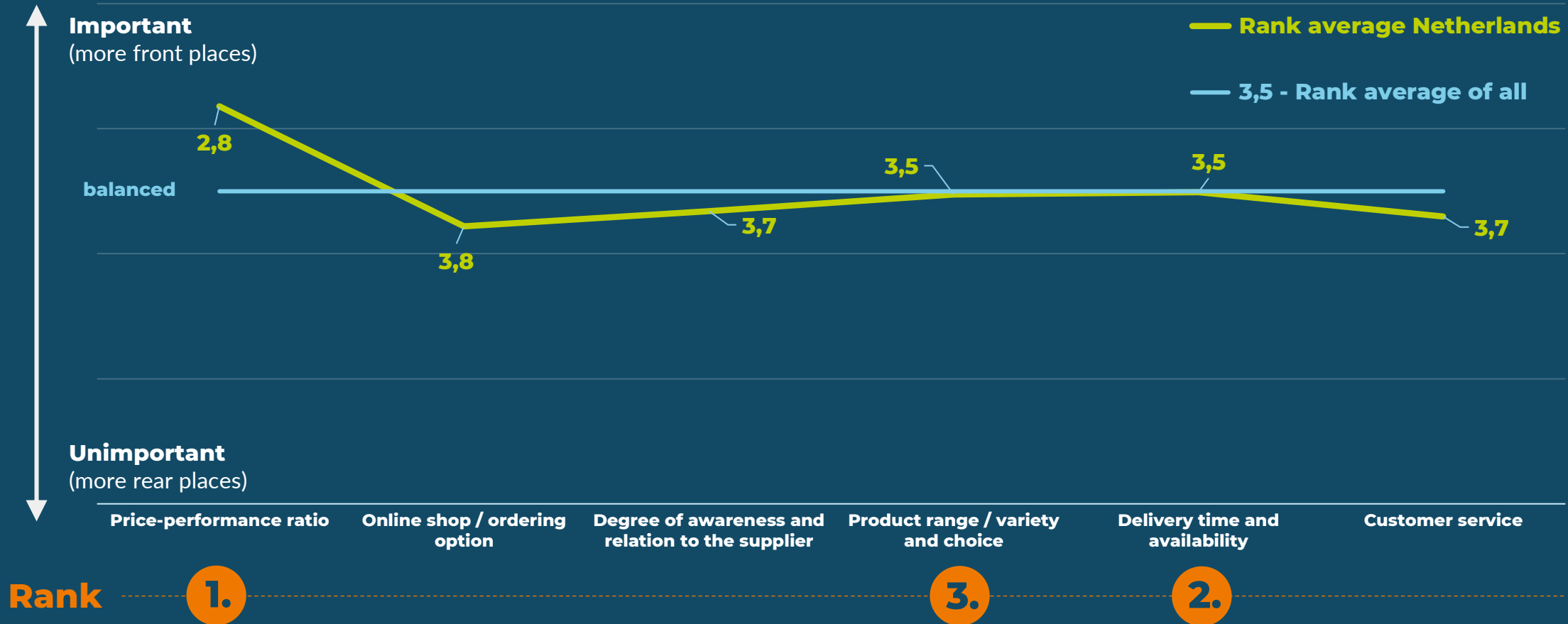


Products - Importance of characteristics

Ranking from place 1 to 8



Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

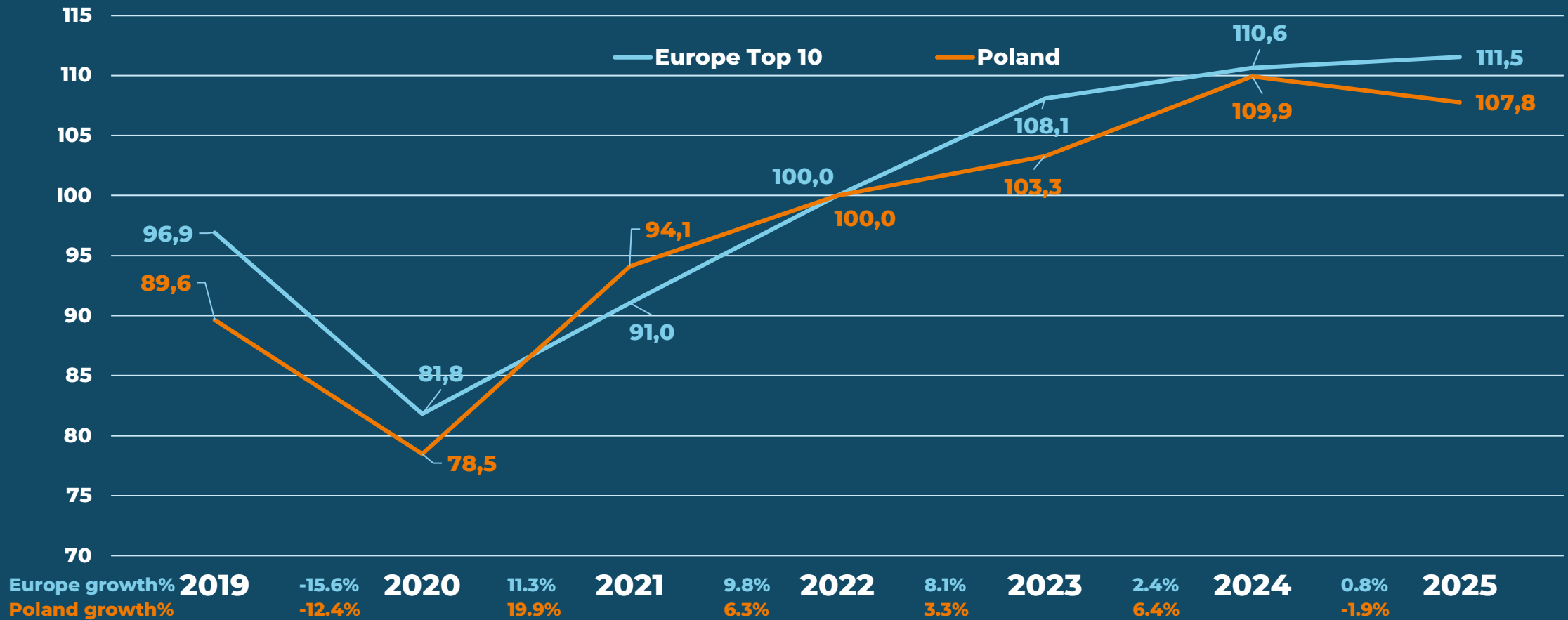
Das Who und
How der Branche.
Mein PSI.

Poland



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

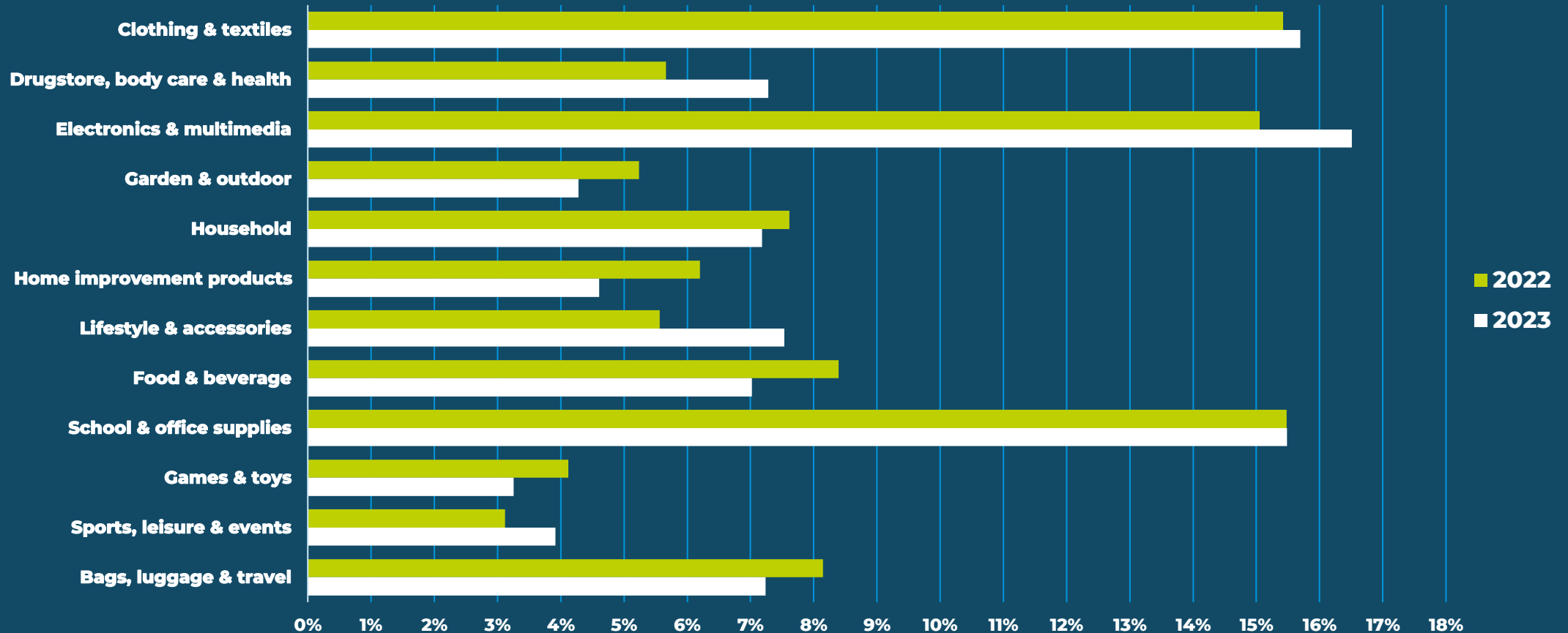
Poland – 2022

889	Total
586	0 to 9 employees
42	10 to 19 employees
50	20 to 49 employees
114	50 to 249 employees
97	250 or more employees

Poland – 2023

918	Total
586	0 to 9 employees
42	10 to 19 employees
51	20 to 49 employees
133	50 to 249 employees
106	250 or more employees

Product segments: Allocation

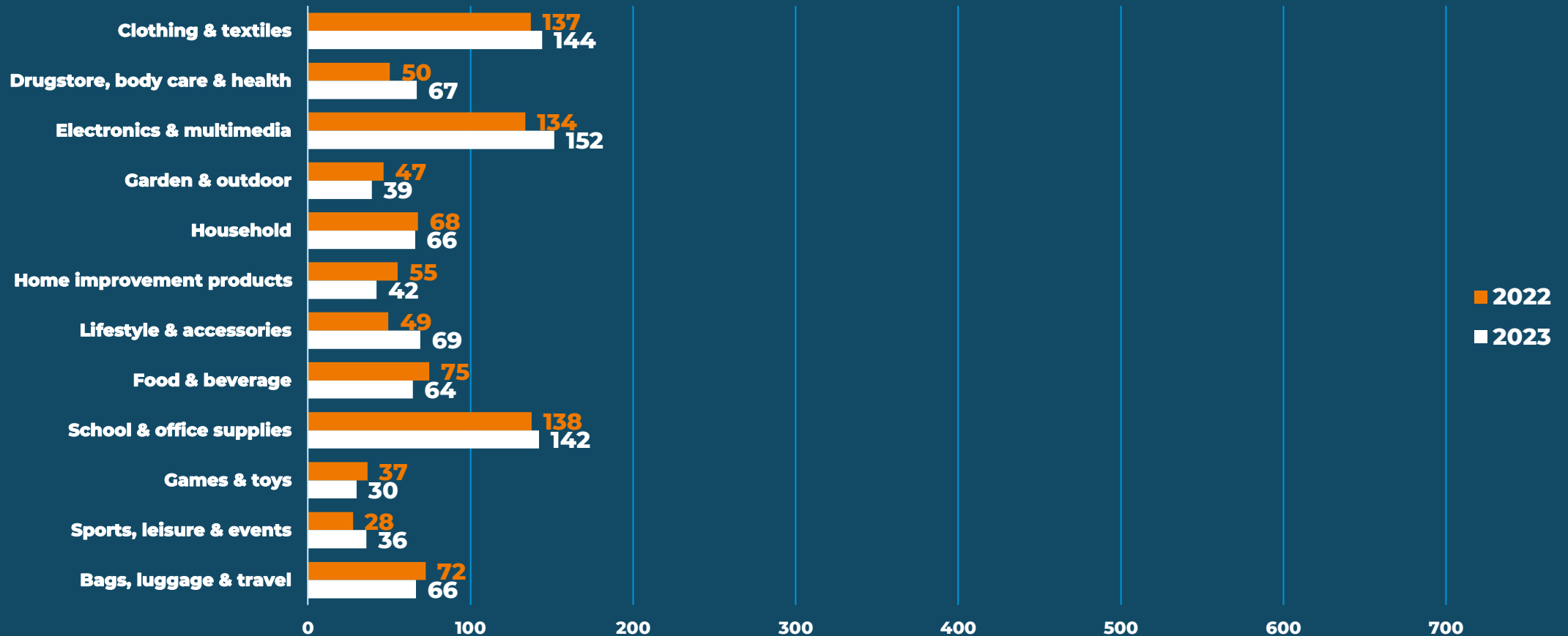


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



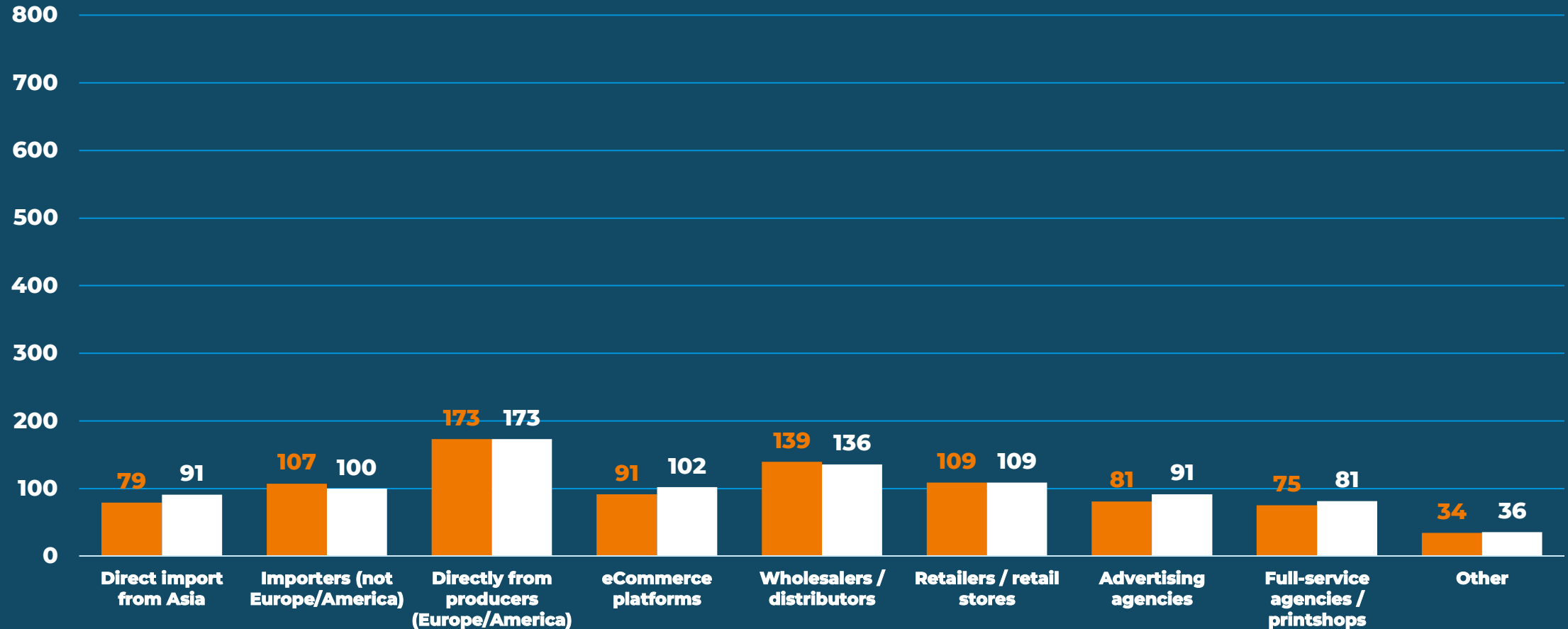
Purchase Channel: Allocation in %



Question:

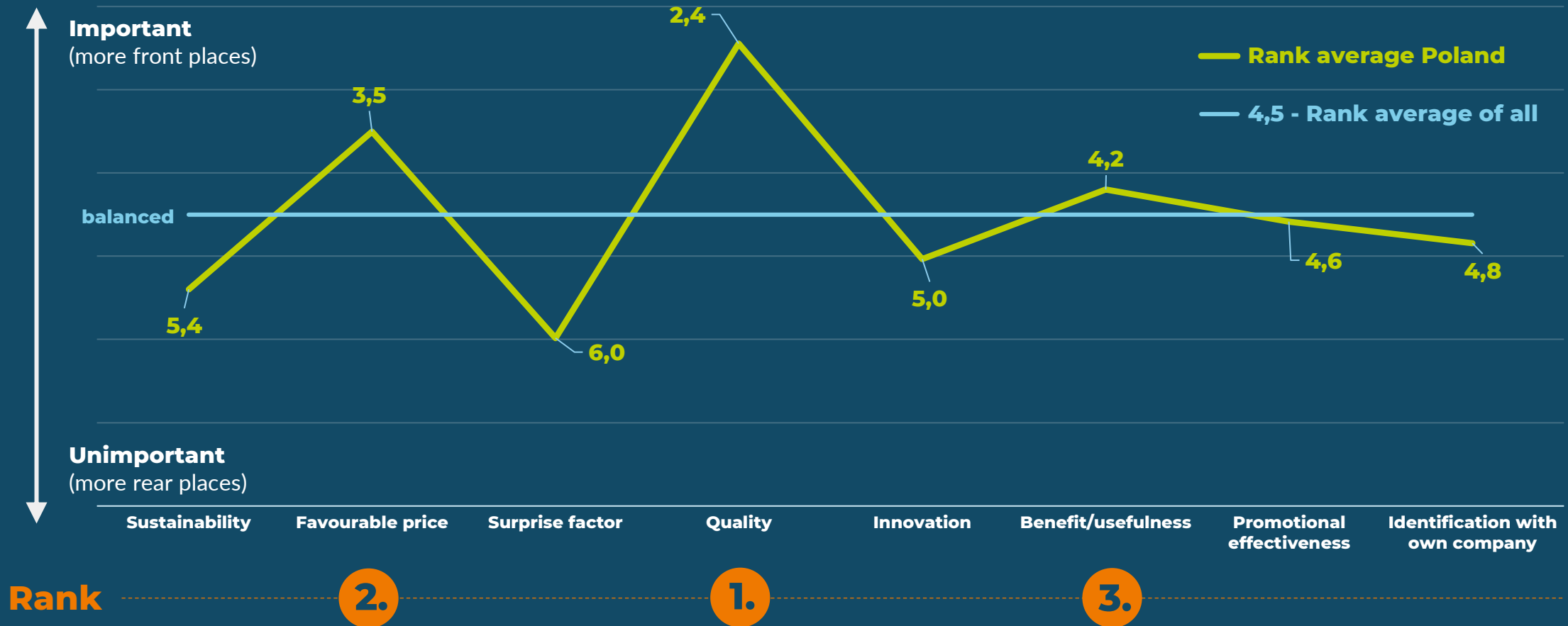
Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro



Products - Importance of characteristics

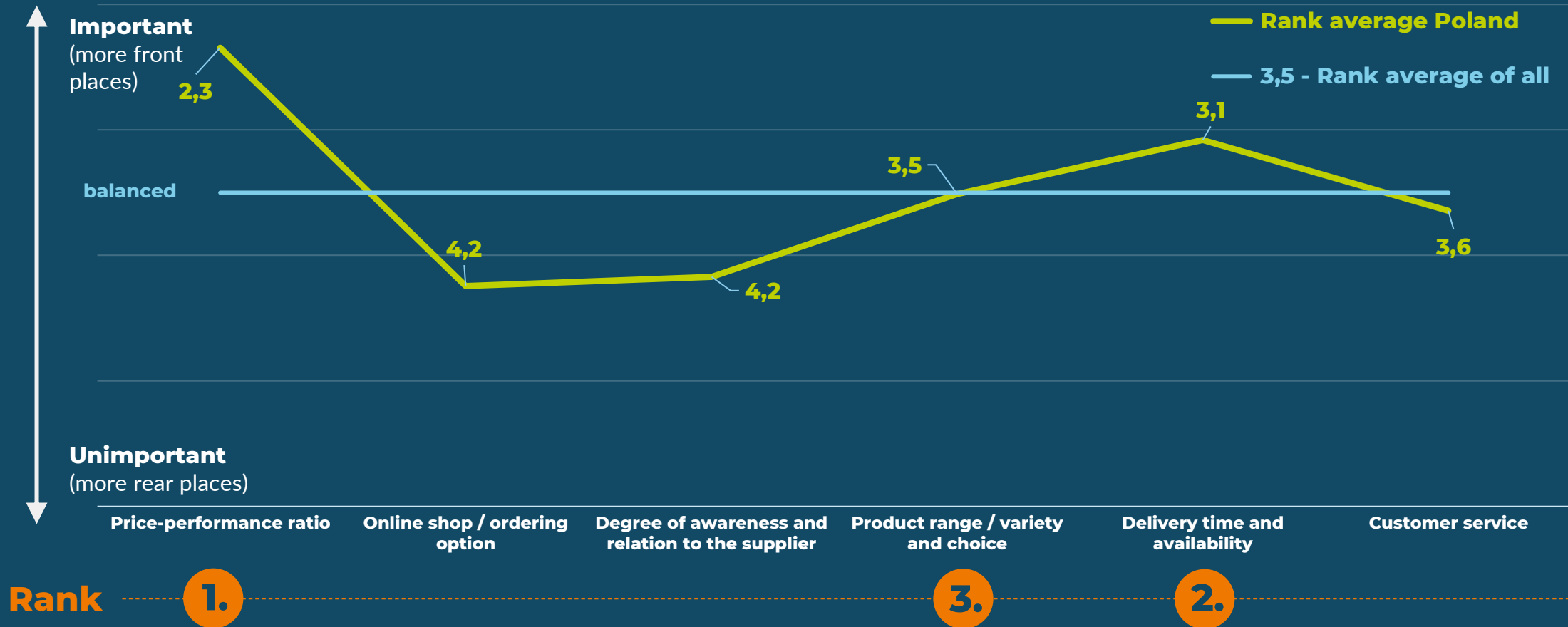
Ranking from place 1 to 8



Question:

How important are the following characteristics for your company when choosing promotional product? Please rank characteristics:

Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

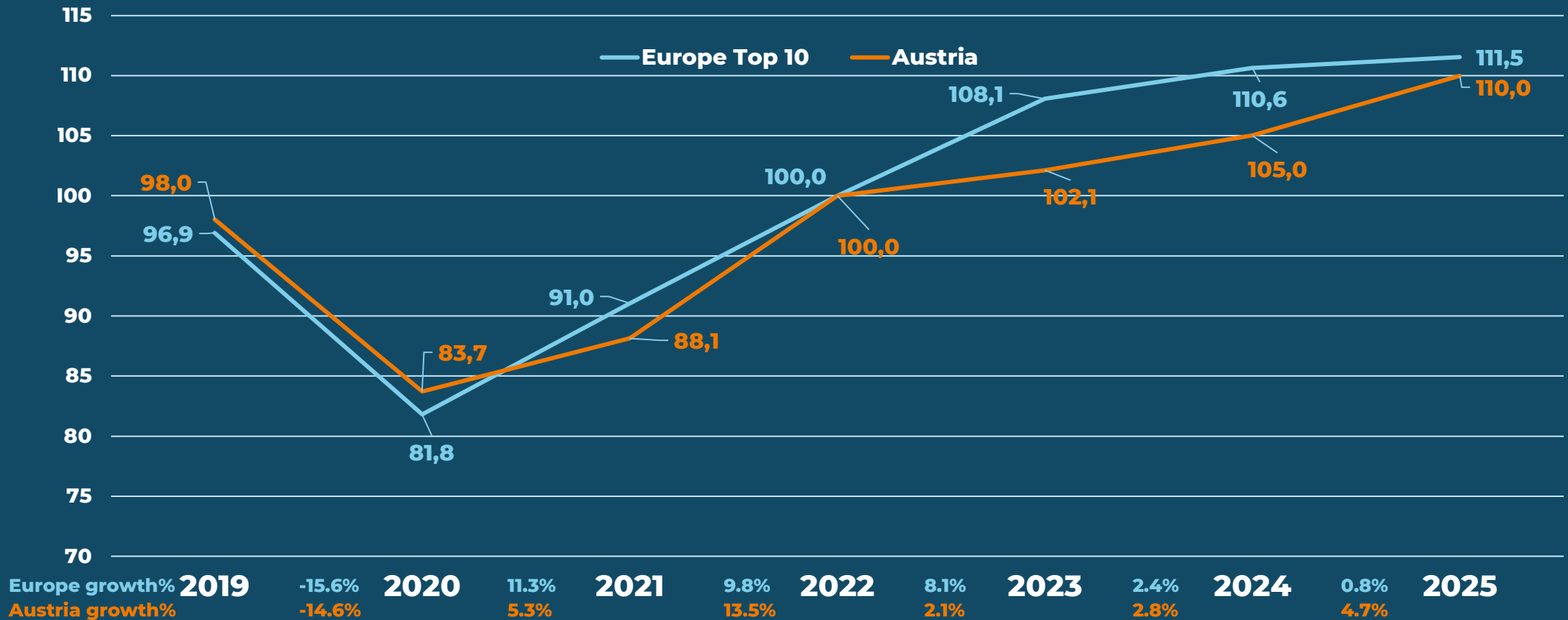
Das Who und
How der Branche.
Mein PSI.

Austria



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

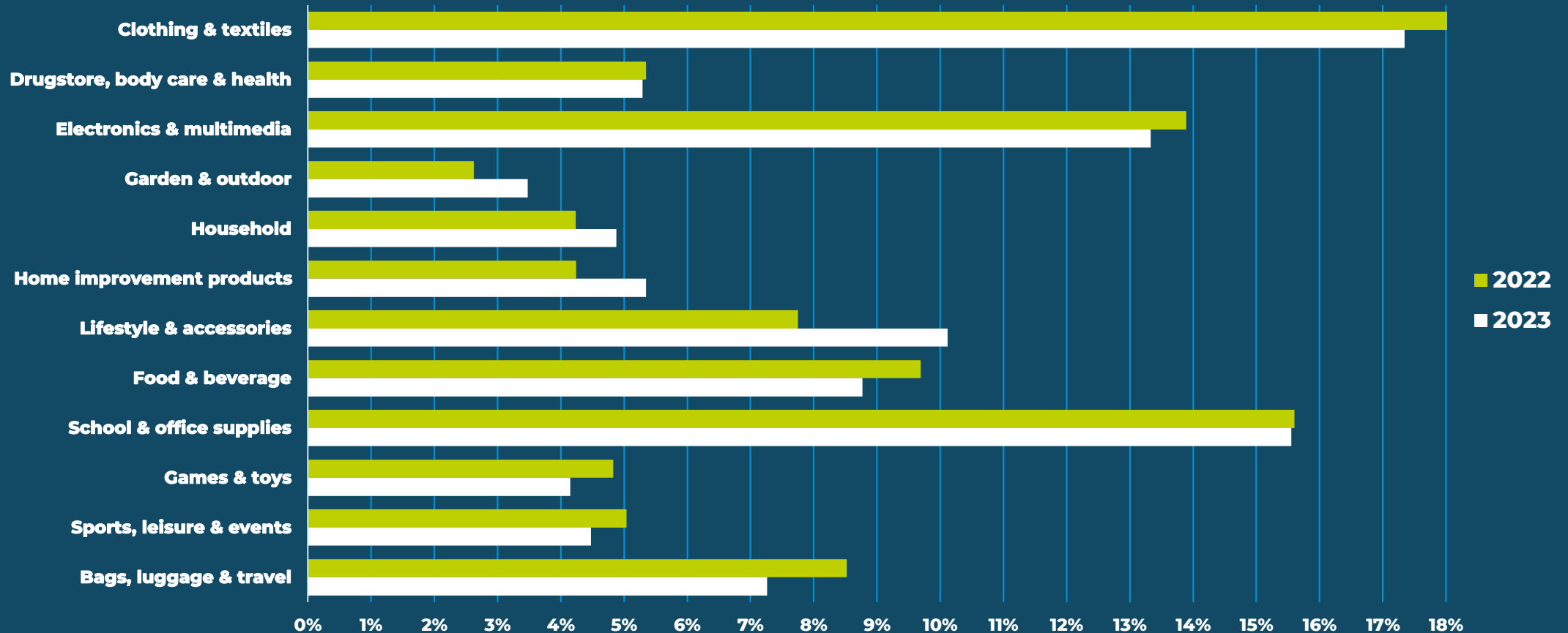
Austria – 2022

368	Total
163	0 to 9 employees
32	10 to 19 employees
34	20 to 49 employees
64	50 to 249 employees
75	250 or more employees

Austria – 2023

376	Total
160	0 to 9 employees
30	10 to 19 employees
36	20 to 49 employees
70	50 to 249 employees
80	250 or more employees

Product segments: Allocation

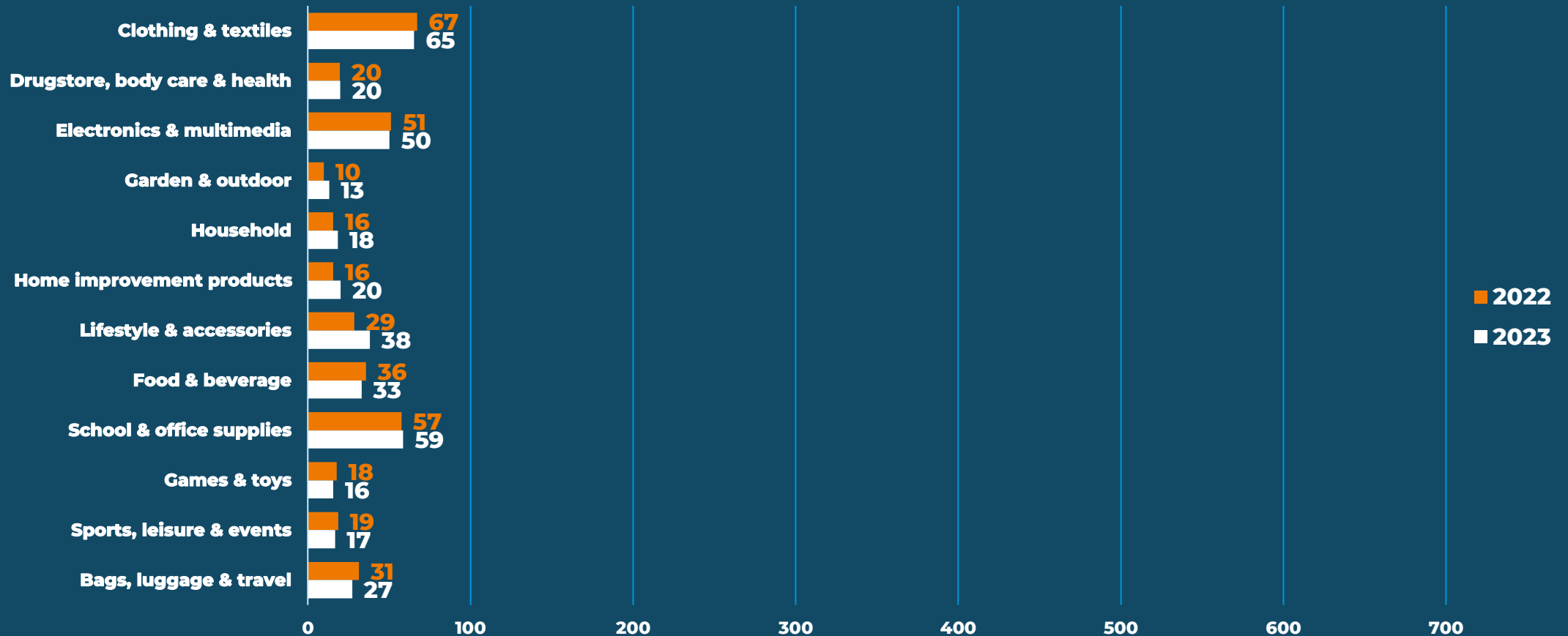


Question:

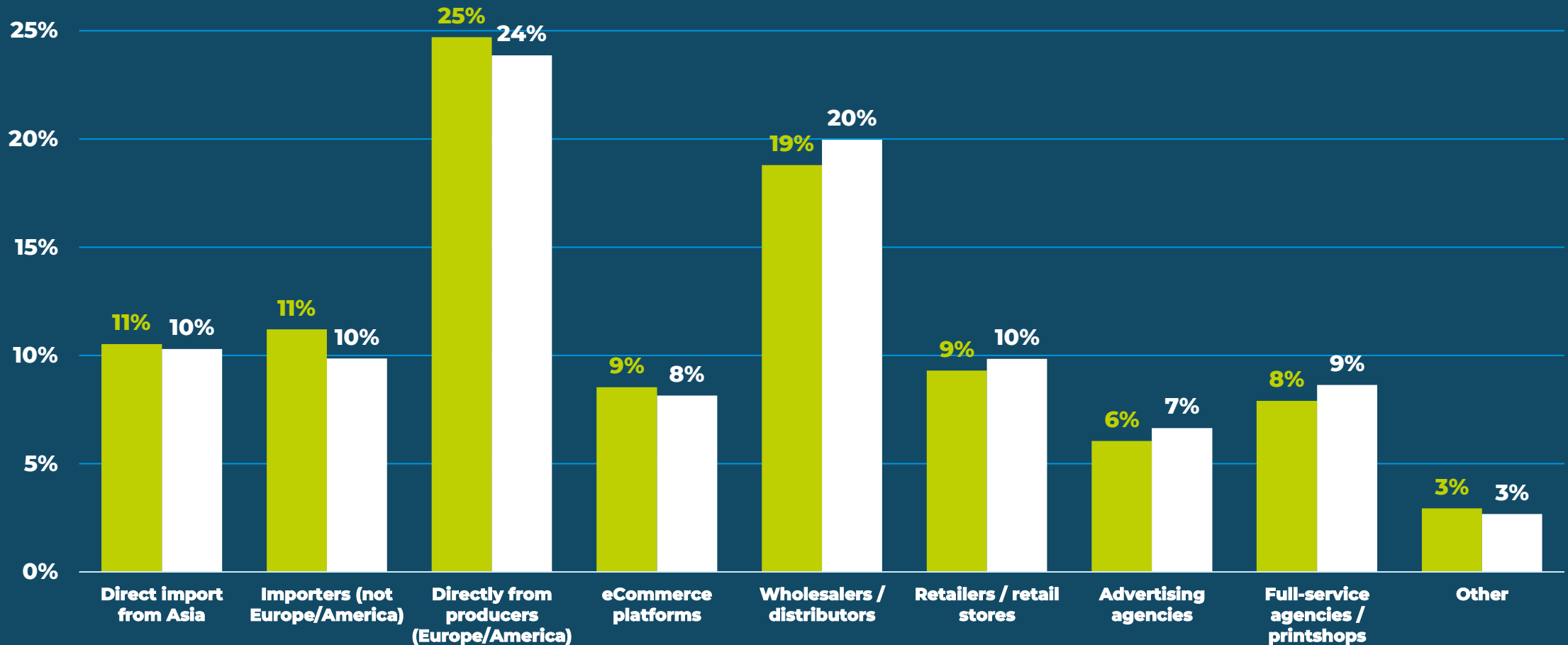
What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



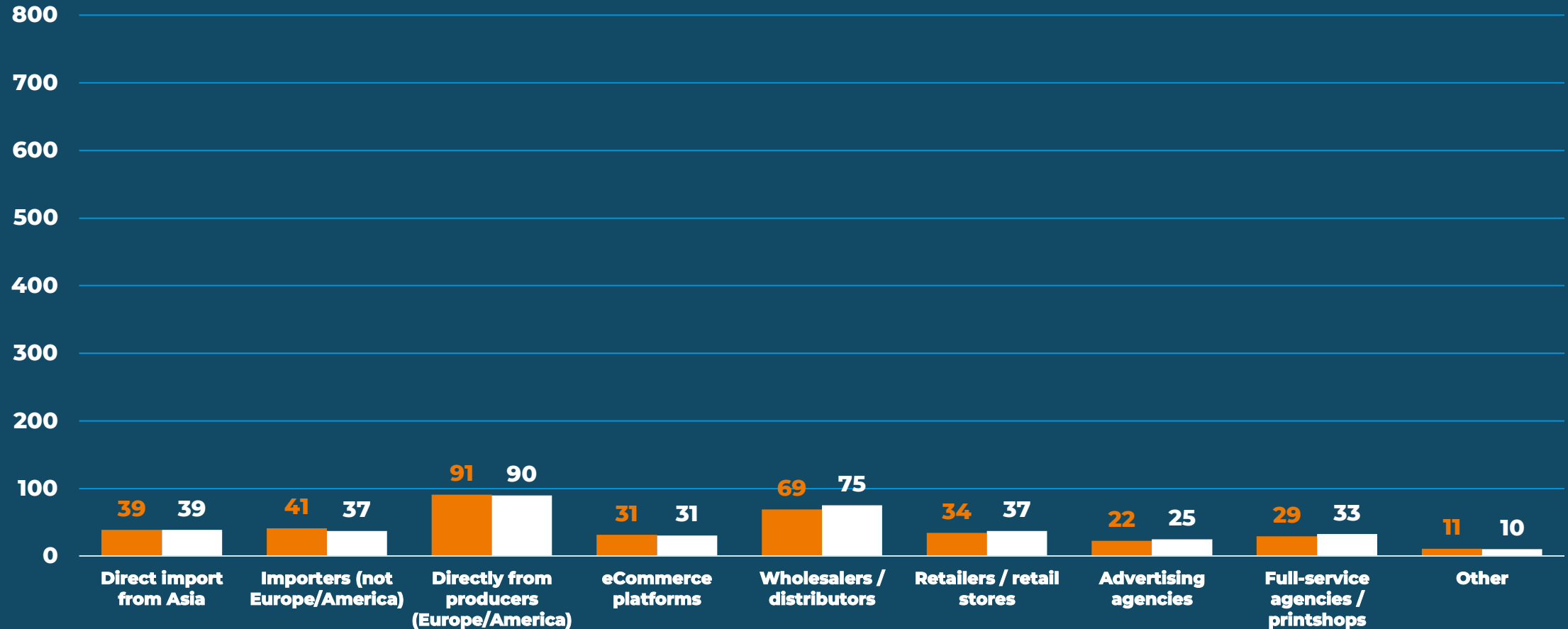
Purchase Channel: Allocation in %



Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro



Products - Importance of characteristics

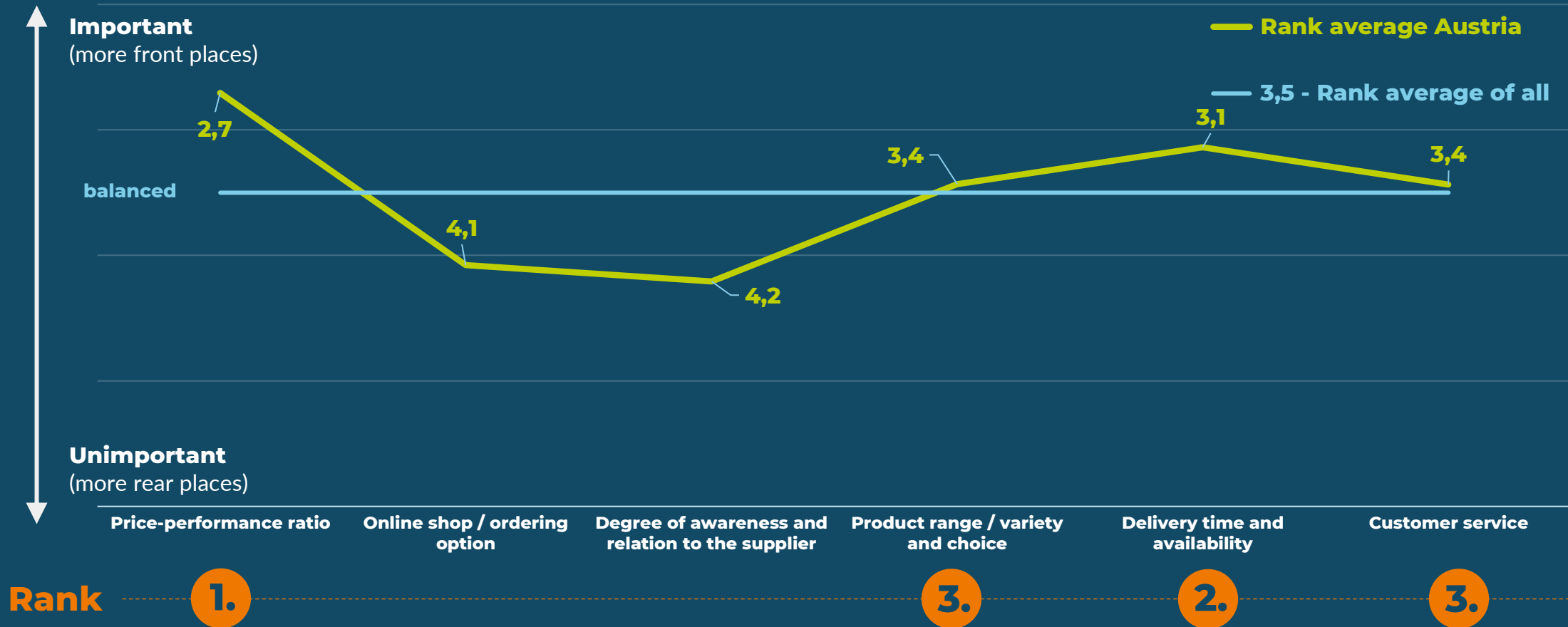
Ranking from place 1 to 8



Question:

How important are the following characteristics for your company when choosing promotional product? Please rank characteristics:

Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

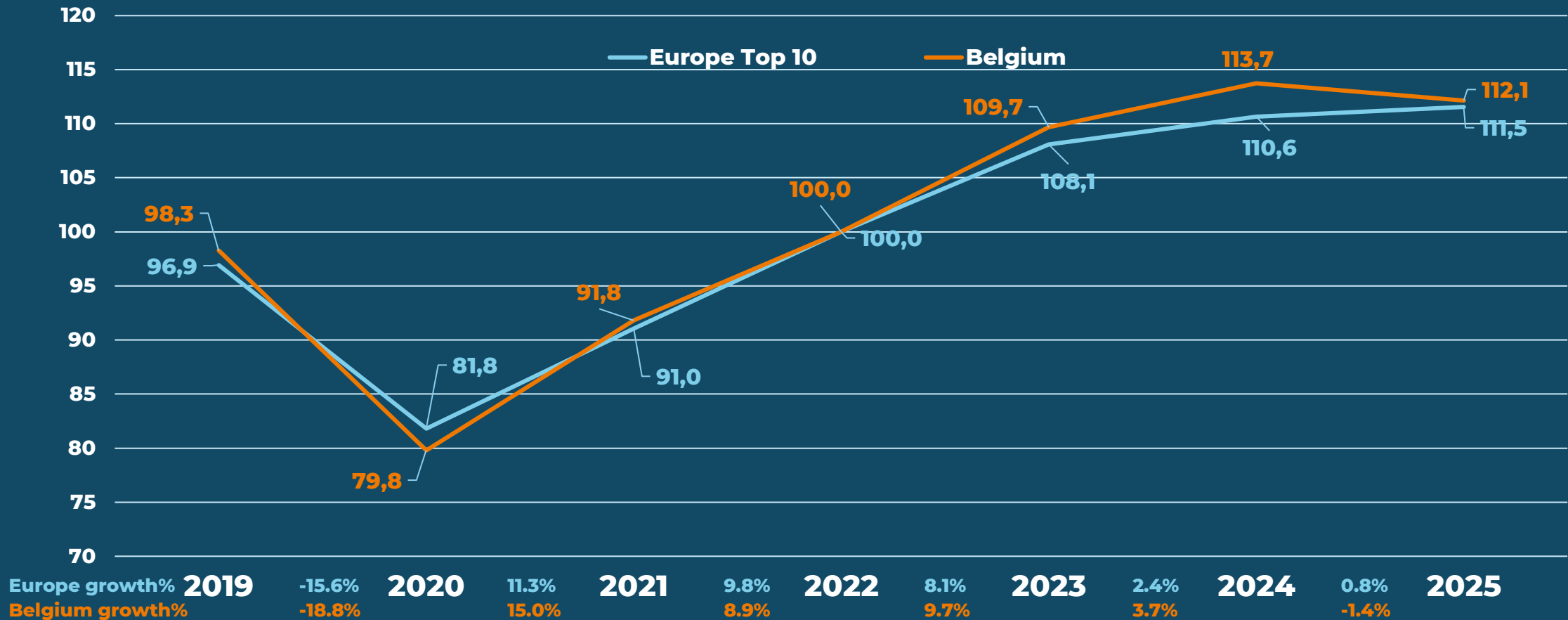
Das Who und
How der Branche.
Mein PSI.

Belgium



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

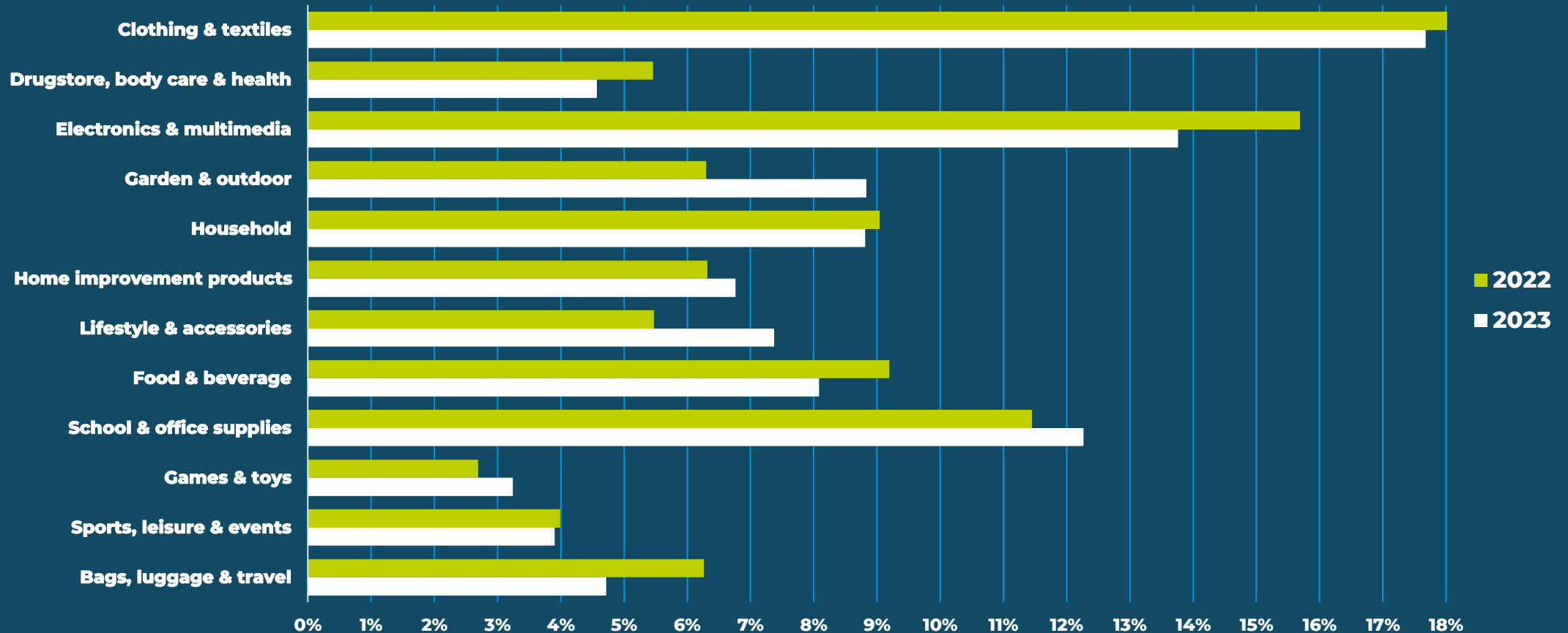
Belgium – 2022

389	Total
216	0 to 9 employees
31	10 to 19 employees
34	20 to 49 employees
53	50 to 249 employees
54	250 or more employees

Belgium – 2023

426	Total
235	0 to 9 employees
37	10 to 19 employees
39	20 to 49 employees
54	50 to 249 employees
62	250 or more employees

Product segments: Allocation

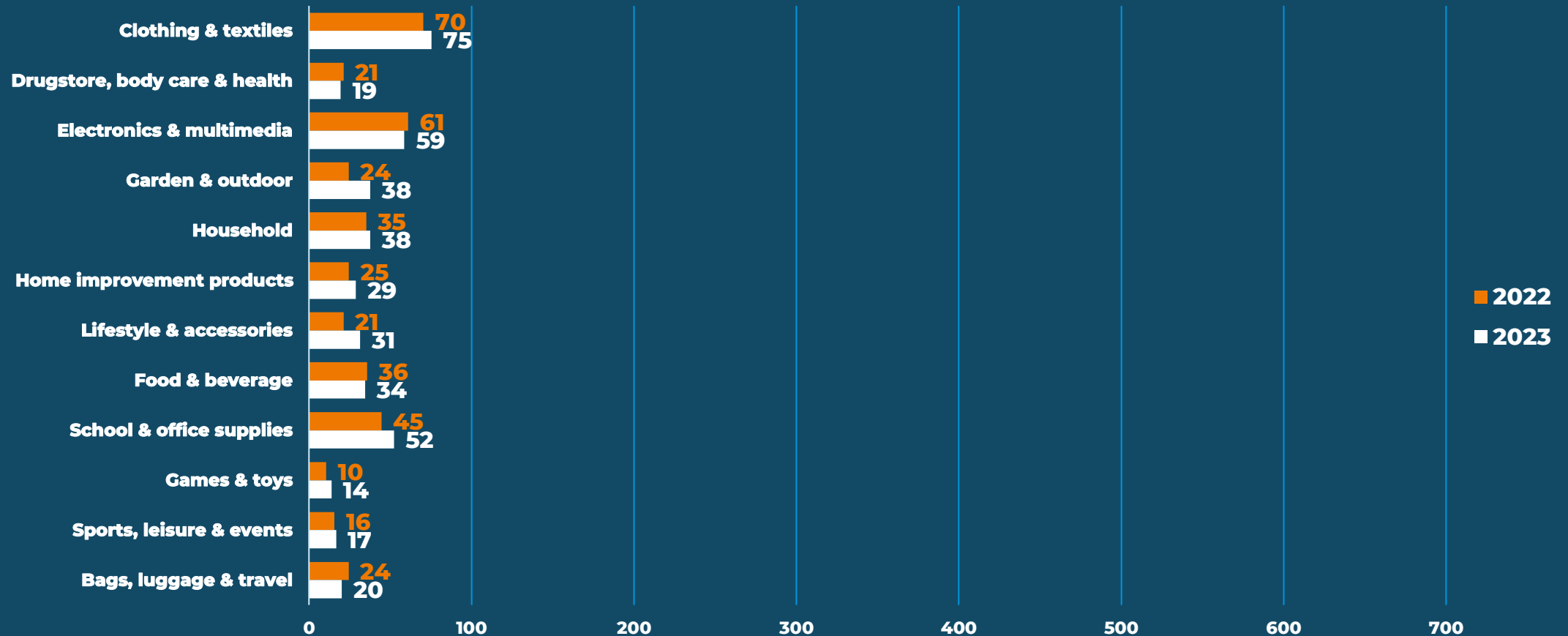


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



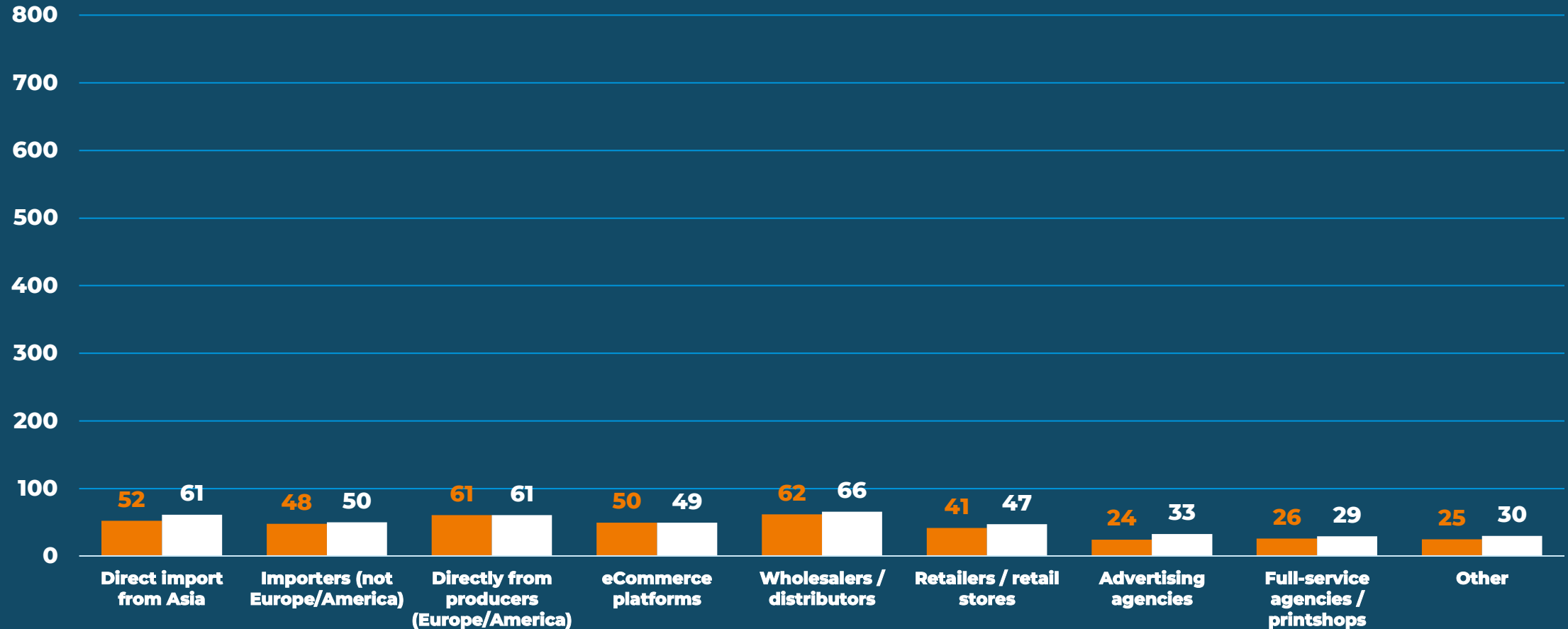
Purchase Channel: Allocation in %



Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro

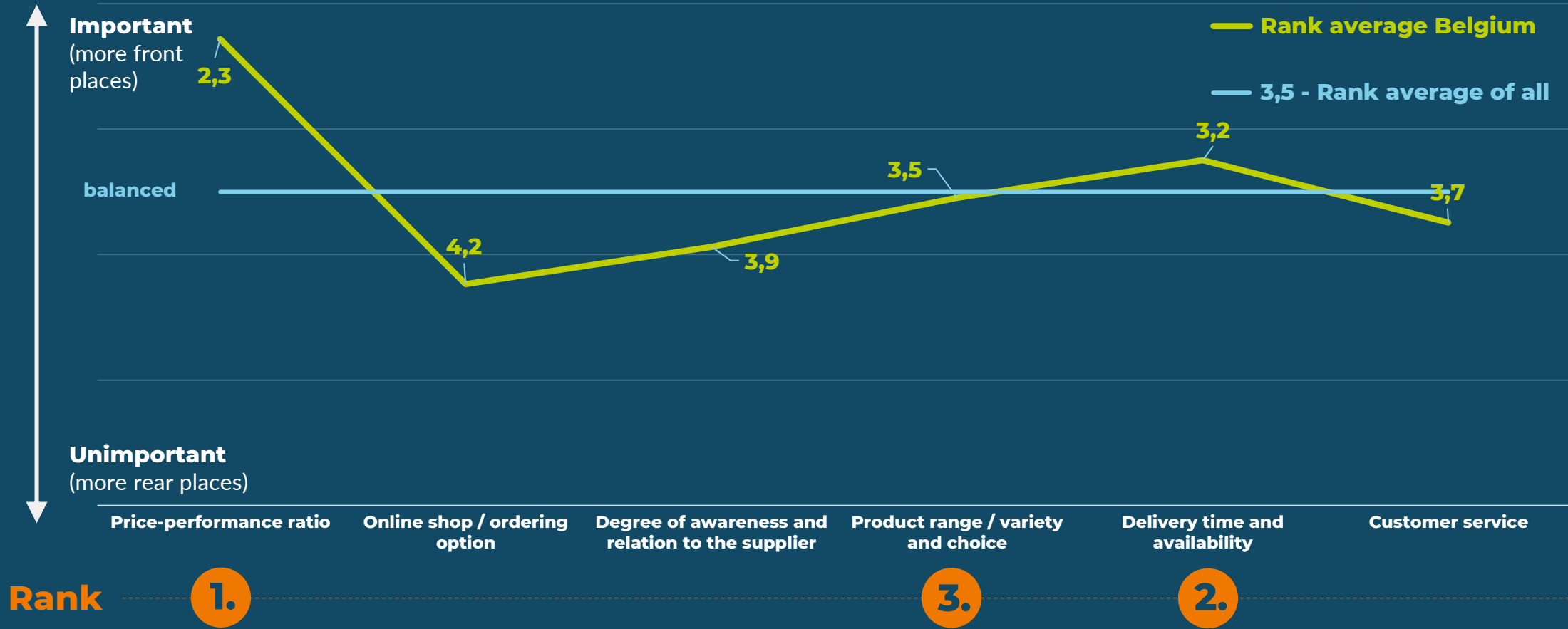


Products - Importance of characteristics

Ranking from place 1 to 8



Provider - Importance of characteristics ranking from place 1 to 6



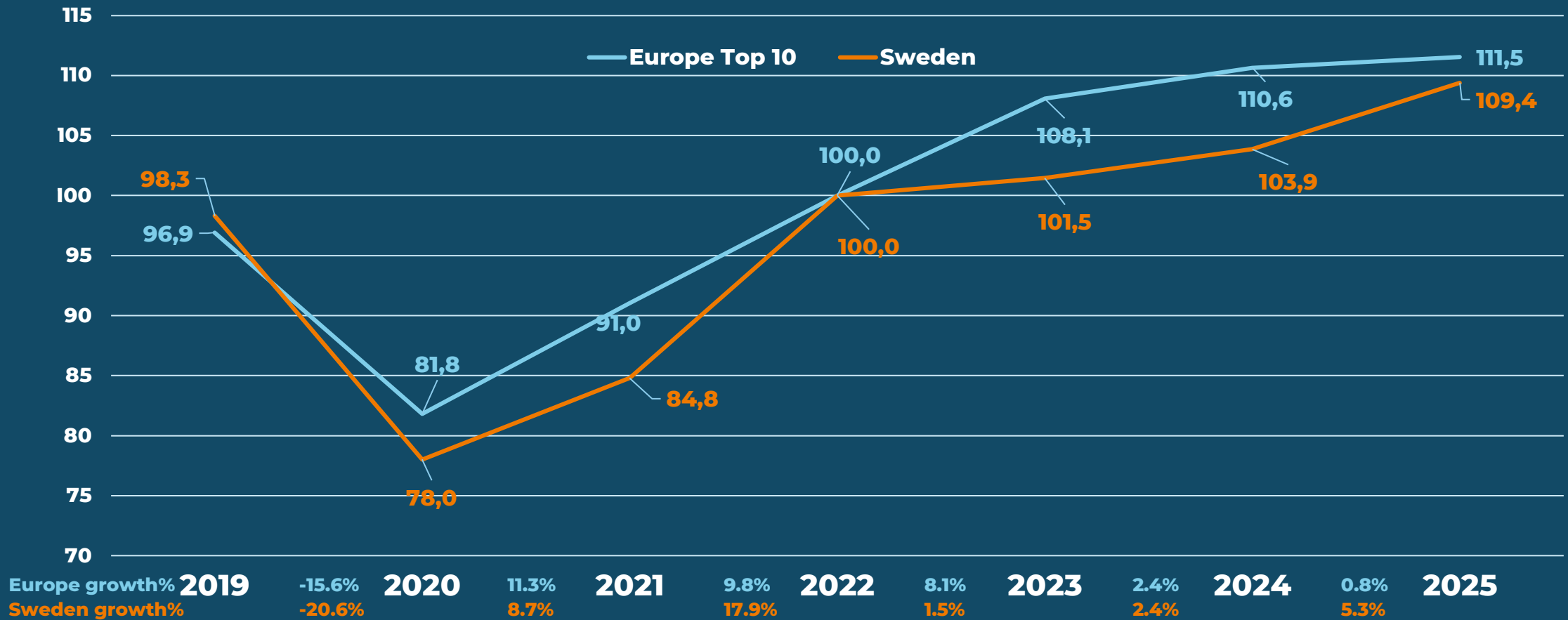
Question:
How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order:

Sweden



Deployment of Spendings

2022 = 100 Index points



Spending by Industry Buyers

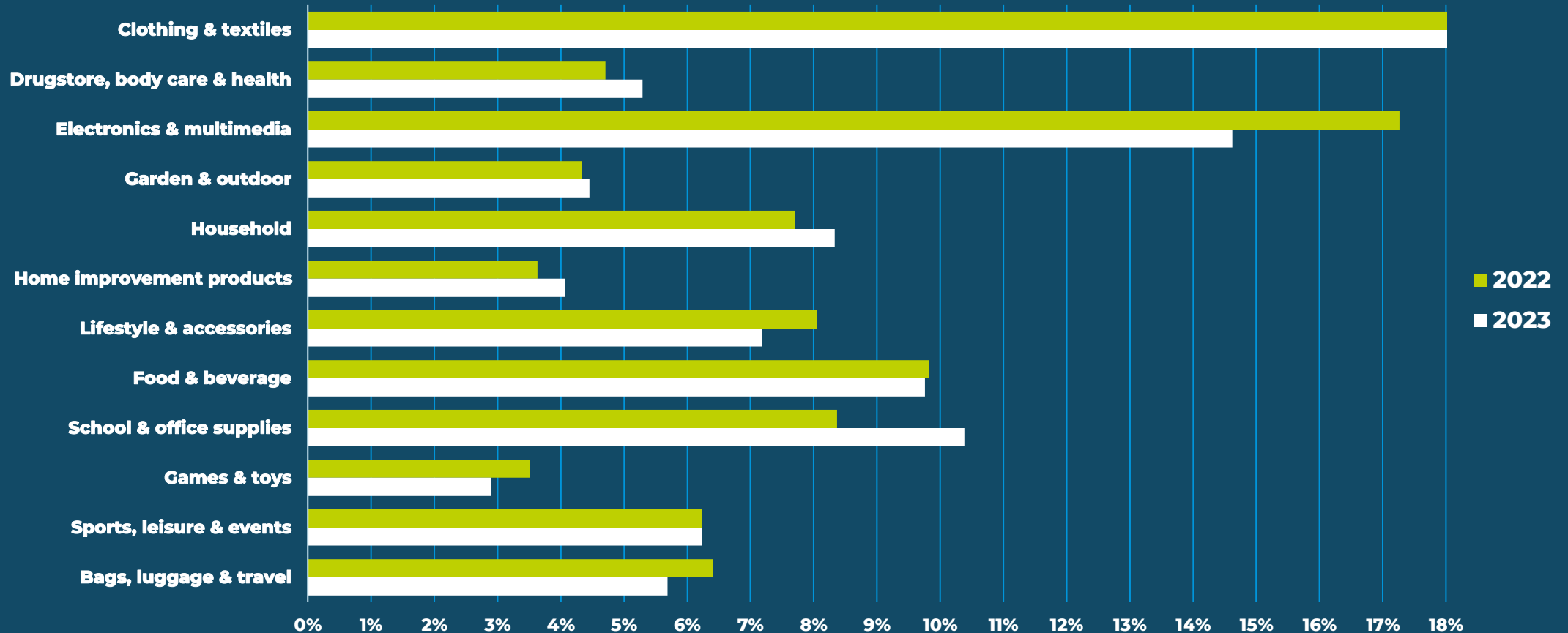
Sweden – 2022

468	Total
221	0 to 9 employees
28	10 to 19 employees
34	20 to 49 employees
88	50 to 249 employees
97	250 or more employees

Sweden – 2023

475	Total
215	0 to 9 employees
31	10 to 19 employees
36	20 to 49 employees
92	50 to 249 employees
100	250 or more employees

Product segments: Allocation

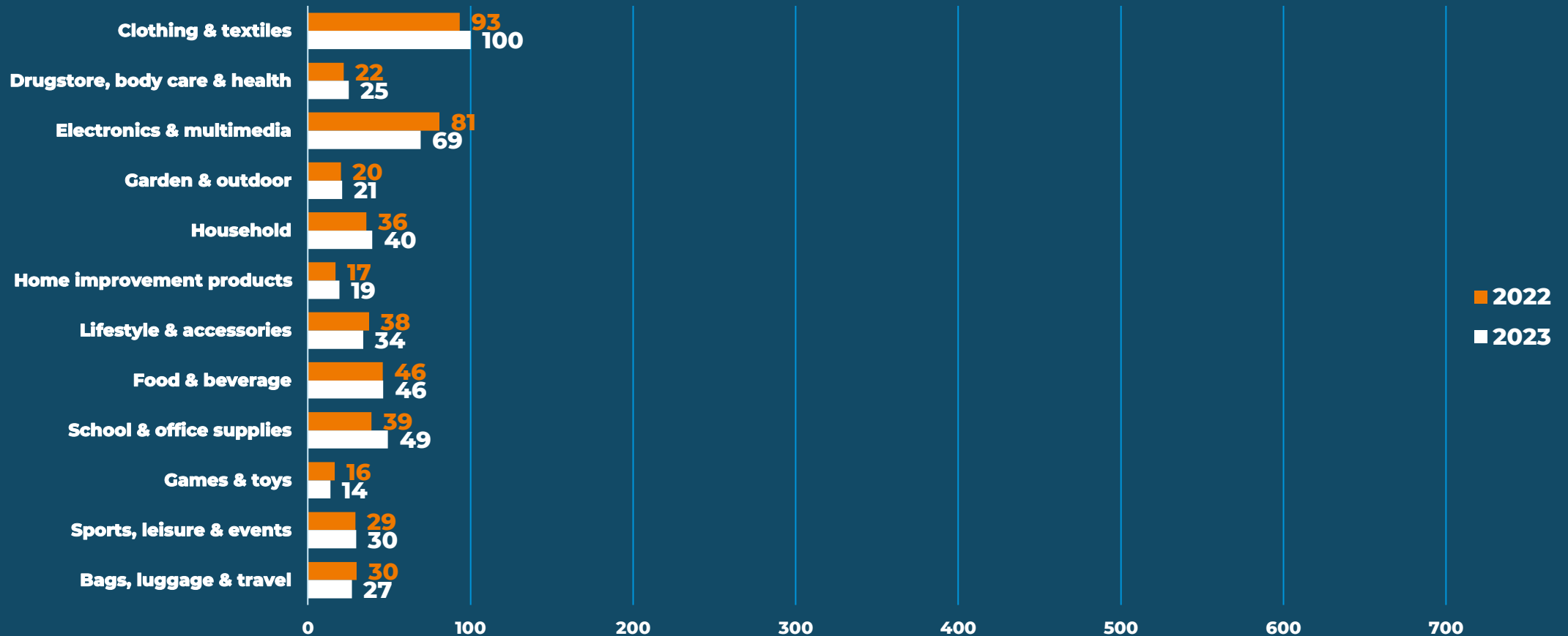


Question:

What percentage of your spending for Promotional products in the past year was allocated to the following product segments?

What percentage of your spending for promotional products in 2023 will be allocated to the following product segments?

Product segments: Spendings in million Euro



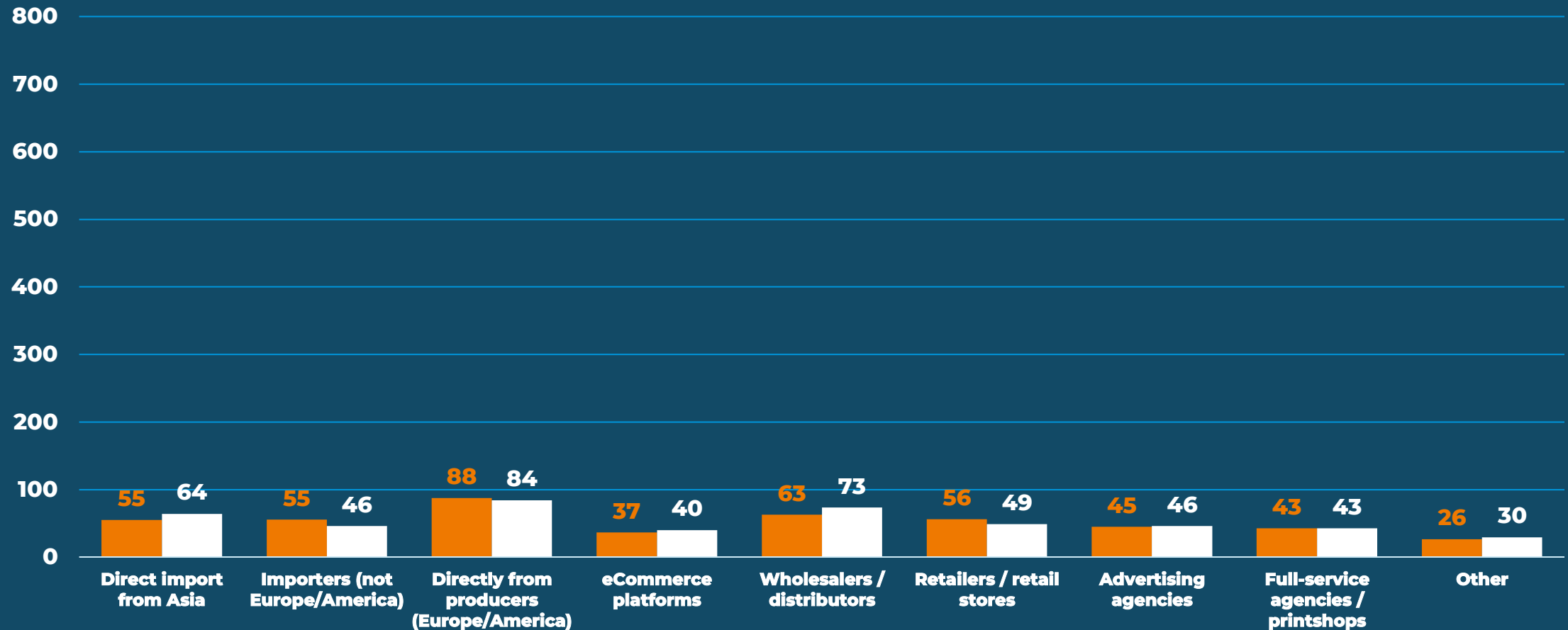
Purchase Channel: Allocation in %



Question:

Please assign a percentage figure to your spending for promotional products in 2022 and 2023 according to the purchase channel. The sum of spending is to be 100%.

Purchase Channel: Spendings in Million Euro

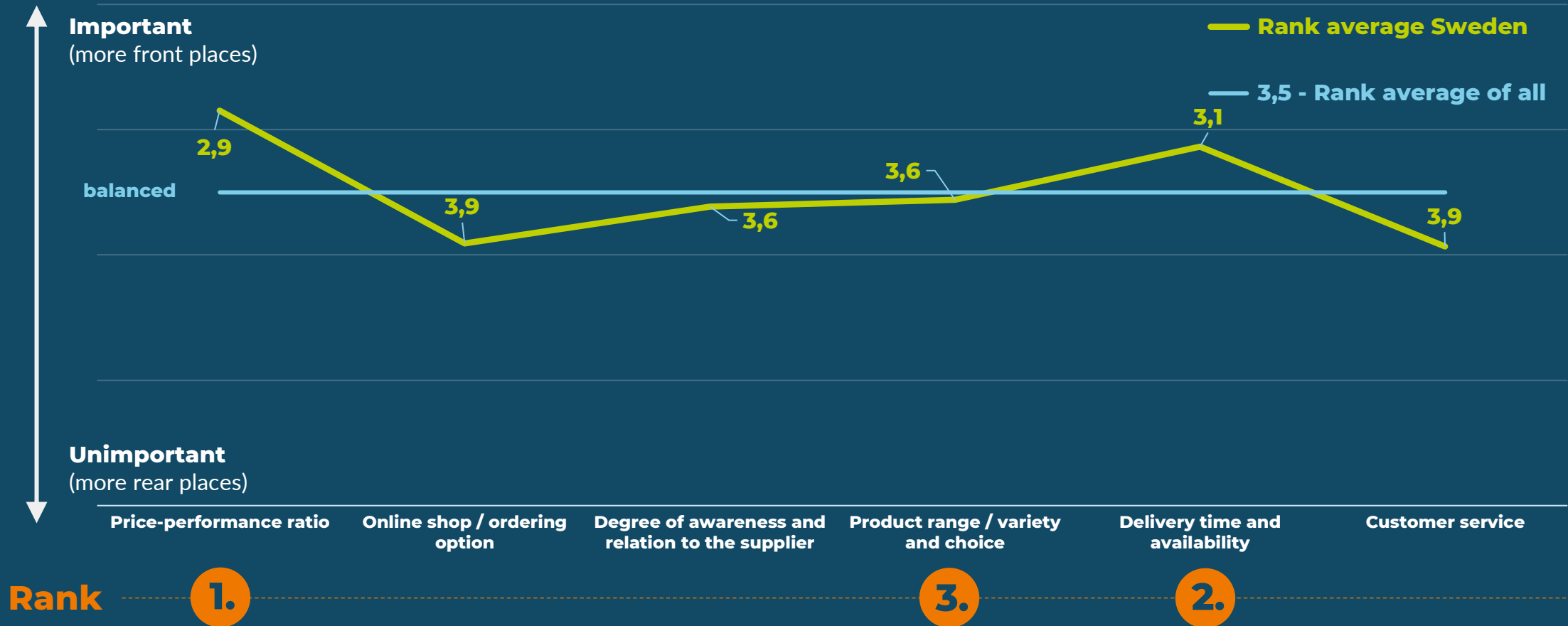


Products - Importance of characteristics

Ranking from place 1 to 8



Provider - Importance of characteristics ranking from place 1 to 6



Question:

How important are the following characteristics for your company when choosing a provider for promotional products? Please choose your order: