

**A Study of the Incentive Merchandise
and
Travel Marketplace**

Conducted for

The Incentive Federation

By the

Center for Concept Development

**Princeton, NJ
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“A Study of the Incentive Merchandise and Travel Marketplace” has been sponsored by the following members of The Incentive Federation:

ASSOCIATION OF RETAIL MARKETING SERVICES

INCENTIVE MAGAZINE

INCENTIVE MANUFACTURERS REPRESENTATIVES ASSOCIATION

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THE MOTIVATION SHOW BY HALL-ERICKSON, INC.

POTENTIALS MAGAZINE

PROMOTION MARKETING ASSOCIATION

PROMOTIONAL PRODUCTS ASSOCIATION INTERNATIONAL

SITE FOUNDATION

Methodology

In 1999, the Incentive Federation requested that the Center for Concept Development conduct focus groups with incentive users in the New York, Los Angeles, Dallas, Chicago, and Atlanta areas. The purpose of this qualitative research was to identify issues regarding the following:

- The level of awareness (usage) of incentives by corporate America;
- Usage levels of the various types of incentives;
- Industry breakout of user organization;
- Delineation by type of incentive used;
- Degree of involvement by corporate management/ officers in incentive program planning;
- Usage of the Internet for incentives;
- Sources of information relating to incentives; and
- Indications regarding effectiveness of incentives.

In 2000, the Incentive Federation requested that the Center for Concept Development execute the second, quantitative, phase of this research. This research consisted of a mail questionnaire sent to 8,000 executives in a cross section of American enterprises on a national basis. The questionnaire, designed by Ralph Head & Associates, was sent with a \$1.00 bill and a postage-free return envelope and reflected issues that were learned in the focus groups conducted among incentive users in 1999. A test mailing of 1,000 was made to ensure that the desired results would be obtained. Once it was determined that the desired results would be obtained the full mailing was made.

The mailing was sent to Sales, Marketing and Human Resource executives in organizations where such titles existed. In others it was sent to the ranking individual (President, owner, etc.), but in all cases it was sent to an individual and not just a company name. The names were provided by Dun & Bradstreet.

Of the 8,000 questionnaires mailed out, 315 were returned as non-deliverable resulting in a net mailing of 7,685. When the mailing was closed for tabulation on November 18, 2000, 808 useable returns had been received. Subsequent to the close 27 additional questionnaires have been received bringing the total return to 835.

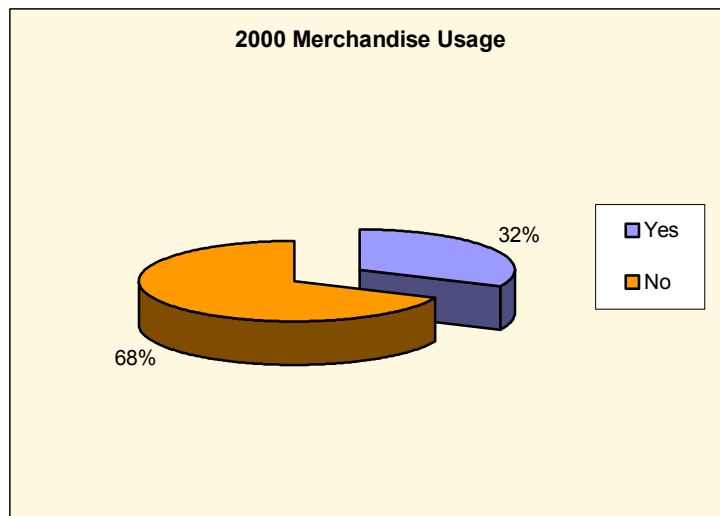
Management Summary

The following pages present the highlights of the findings of this study. Complete values for each graphic will be found in the Details section of this report.

Merchandise and/ or Travel Usage and Estimated \$\$ Value

- Thirty-two percent (32%) of the respondents currently use merchandise and/ or travel to motivate consumers, company salespeople, dealers, distributors and non-sales employees, up from 26% in the 1996 survey.

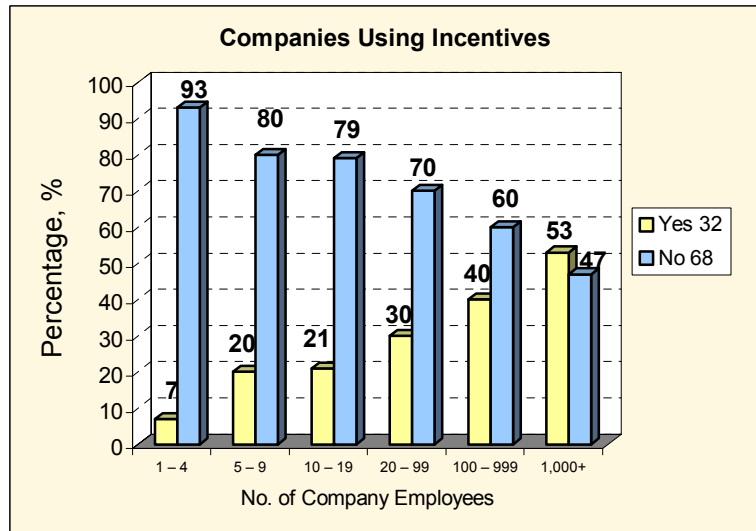
	1996	2000	Change
Use	26%	32%	+6%
Do Not Use	74%	68%	-6%



[Details, Tables 1a & 1b]

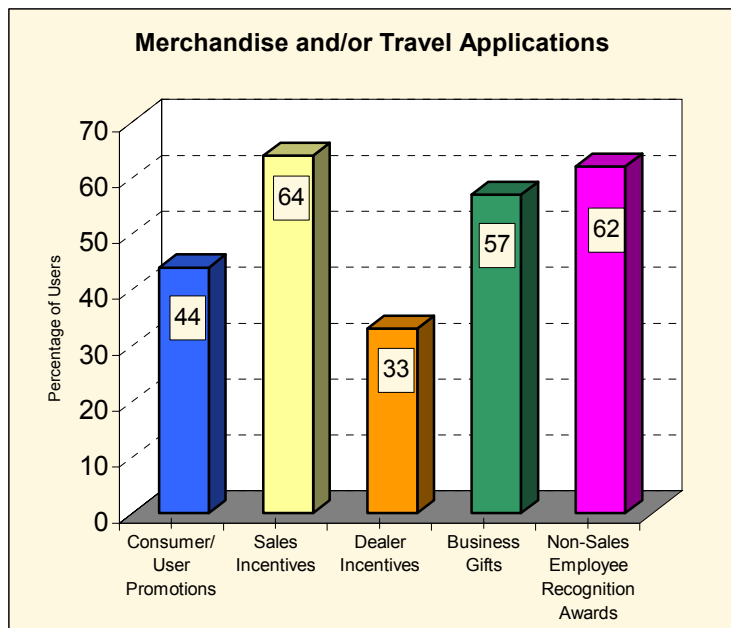
- The highest percentage of usage occurs in the organizations with the greatest number of employees (e.g., 100 – 999 employees and 1,000 + employees). However, according to Dun & Bradstreet (see Tables 13a and 13b in the Details section), these companies account for only 1.8% of the total universe of businesses.

[Details, Tables 1a & 1b]



- Of the 32 percent using merchandise or travel incentives, 64 percent of the respondent organizations use merchandise and/ or travel as Sales/ Incentives for sales management and internal/ outside sales forces, dealer and distributor personnel and independent sales representatives.

Note: “Business Gifts” was added as a separate category in the 2000 survey.



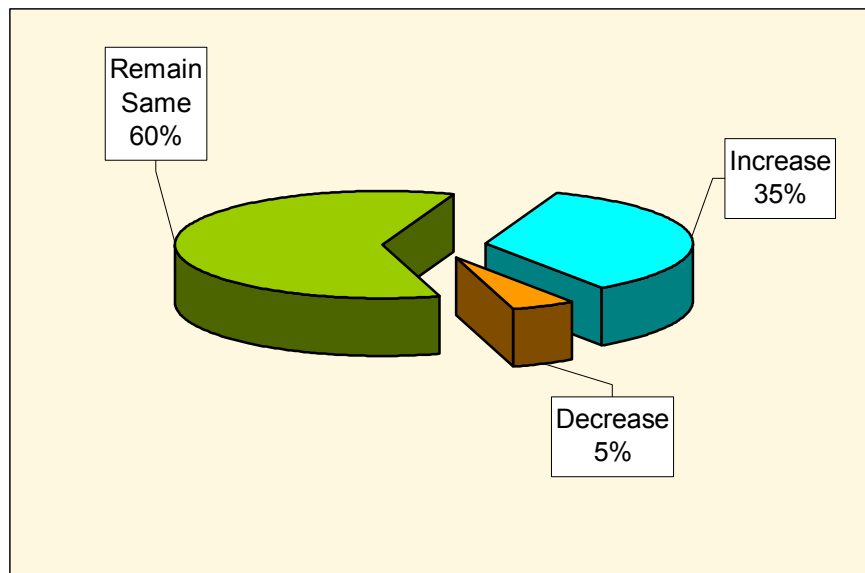
[Details, Tables 2a & 2b]

- The estimated total 2000 expenditure for merchandise and travel items used for motivational purposes is \$26.9 billion. This is based on this survey and Dun & Bradstreet database estimates.
- The estimated expenditure by type of incentive is shown in the table below. “Business Gifts” may include some of the expenditures that were recorded in the “Dealer Merchandise and Dealer Travel” categories in the previous survey.

Type	% of Total	Estimated Expenditure (expressed in \$billions)
Consumer/ User Promotions	16%	\$4.3
Sales Incentives - Merchandise	15%	\$4.0
Sales Incentives - Travel	18%	\$4.7
Dealer Incentives - Merchandise	16%	\$4.3
Dealer Incentives - Travel	15%	\$4.0
Non-Sales Employee - Merchandise	9%	\$2.5
Non-Sales Employee - Travel	4%	\$1.1
Business Gifts	7%	\$2.0
Total	100%	\$26.9

Future Merchandise and Travel Usage of Organizations using Incentives

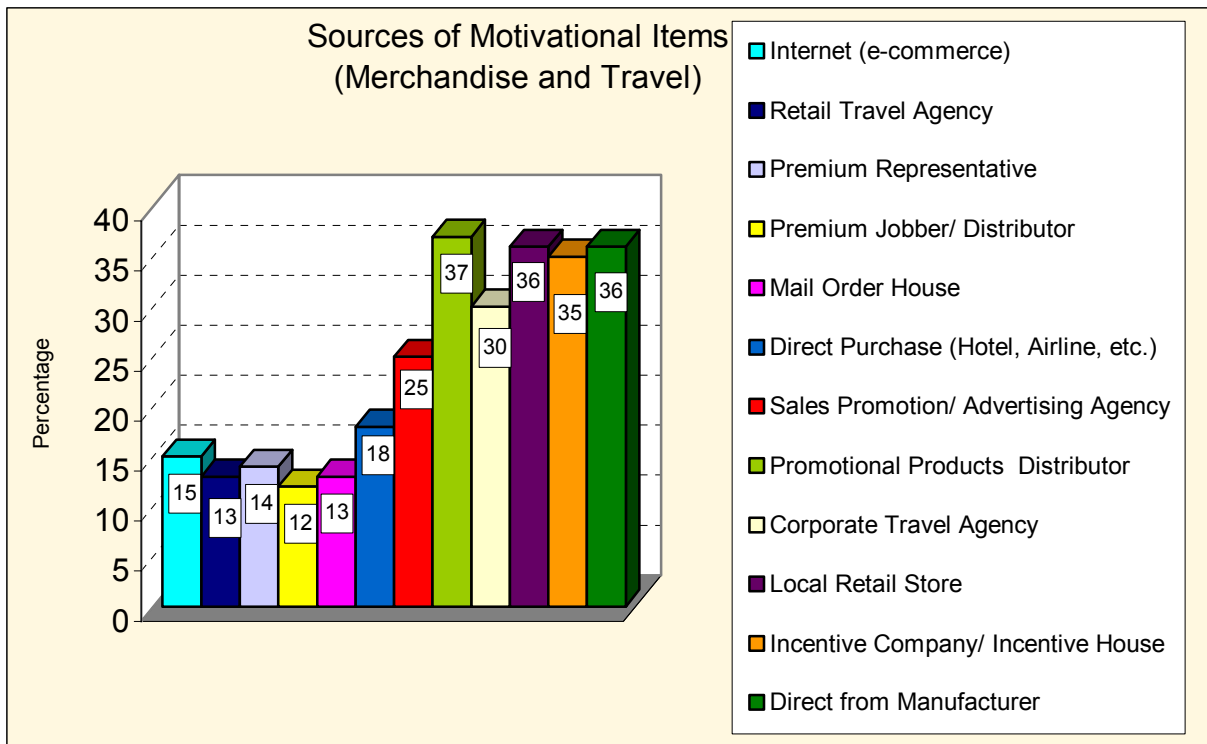
- Thirty-five percent (35%) of the total budgets for motivational items will increase in 2001.
- The average increase is 17%; the average decrease is 27%.



[Details, Tables 4a & 4b]

Sources of Merchandise and Travel Items of Organizations using Incentives

- Thirty-seven percent (37%) of the survey's respondents using incentives have acquired motivational items from a Promotional Products Distributor within the past 12 months.
- Fifteen percent (15%) have used the Internet for motivational programs.
- Thirty-six percent (36%) purchased from a local retail store and thirty percent (30%) purchased from a corporate travel agency.

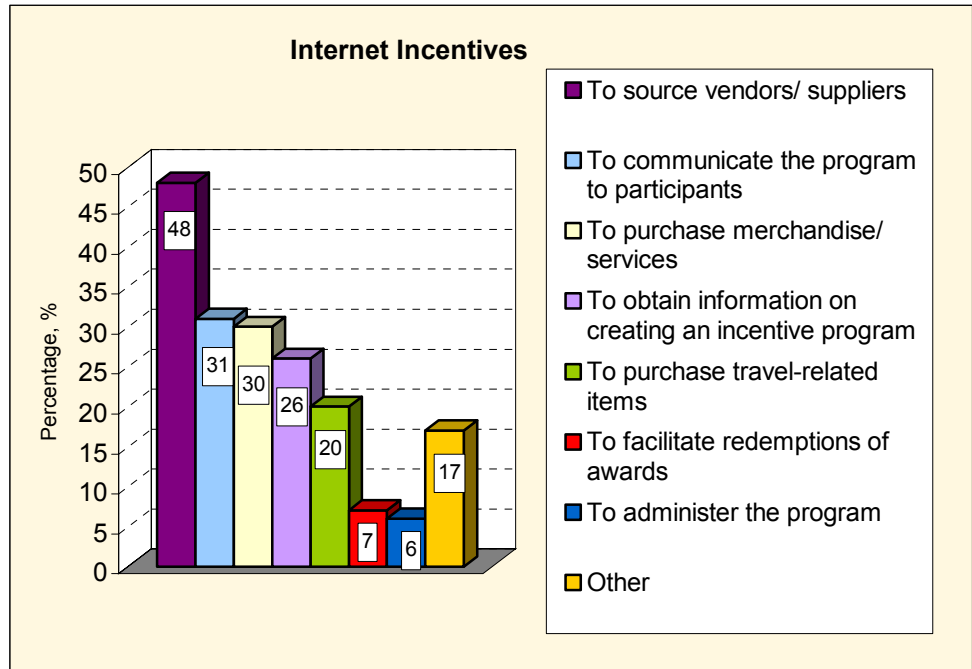


[Details, Tables 5a & 5b]

Usage of the Internet for Motivational Items by Organizations using Incentives

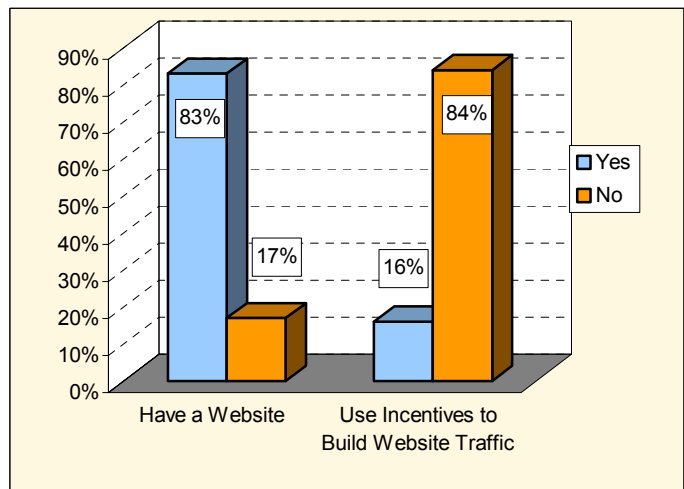
- Of the fifteen percent (15%) of the respondents who used the Internet for motivational programs in the past 12 months, they used the Internet for a variety of purposes:

[Details, Tables 9a & 9b]



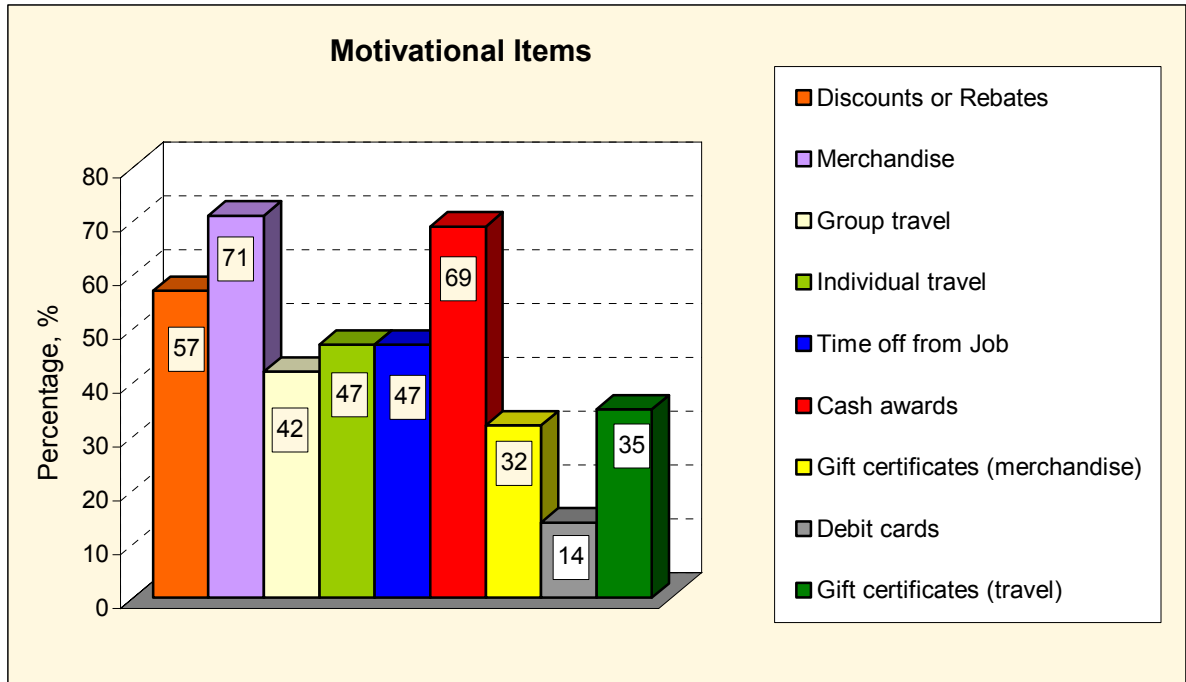
- While 83% of the respondents had a website for their organization, only 16% of the respondents used incentives to build traffic to their website:

[Details, Tables 10a & 10b]



Usage of and Opinions about Selected Motivations

- Sixty-nine percent (69%) of the respondents use cash awards to motivate consumers/ users, salespeople, dealers, distributors or non-sales employees, compared to 63% of the respondents in the 1996 study. However, usage of other non-cash awards also increased versus 1996, suggesting that respondents are using a more varied mix of motivations.



[Details, Tables 6a & 6b]

- “**Cash Awards**” was rated most effective, on an index rating, in reaching both marketing and sales goals and personnel goals. “**Time Off from Job**” and “**Cash Awards**” were rated most effective in reaching non-sales personnel goals.

The index rating is based upon the respondents’ indication of how effective they have found each of the items. The effectiveness ratings are Extremely, Very, Fairly, Somewhat, Not Very and Not At All [Details, Tables 7a & 7b].

Effectiveness Ratings of Selected Motivations		
Motivation	Marketing / Sales Goals	Non-Sales Personnel Goals
Cash Awards	500	491
Gift Certificates (Merchandise)	428	438
Discounts or Rebates	421	364
Individual Travel	419	392
Merchandise	415	420
Time Off from Job	423	448
Group Travel	407	320

*Note: Values in **Bold** added for emphasis.*

About Those Who Don’t Use Incentives

Concern about cost	48%
Making program fair to all employees/ customers	25%
Uncertain about the outcome	21%
Uncertain about the kind of incentives to offer	21%
Don't know enough about incentive programs	21%
Management resistance	18%
Legal/ liability issues	16%
Don't know how to measure results	13%
Won't be able to administer	12%

- Of the respondents who did not use incentives in the past 2 years, a concern about cost is the main reason why their companies do not use incentives.

[Details, Table 11c]

Conclusions

The survey recently conducted among executives shows that the usage of merchandise and/ or travel as incentives has increased slightly since the last survey conducted in 1996. Despite this increase, approximately 2 out of 3 companies still are not using merchandise and/ or travel as incentives. This suggests a considerable untapped opportunity for companies who supply products or services that are used as incentives.

According to the companies who do not use incentives, the biggest obstacle by far is a concern about the cost of an incentive program. To overcome this concern, suppliers of incentives must offer incentives that represent a good value for the expenditure. In addition, suppliers of incentives should be ready to demonstrate how incentive programs deliver tangible results and achieve their objectives. To make a convincing case, testimonials about successful incentive programs could be very persuasive to non-users of incentives, especially if these testimonials are from companies in non-users' respective industries.

For suppliers of incentives, a good opportunity for increasing volume may be in companies and industries where usage of motivational items as incentives is underdeveloped versus the average. According to this survey, companies with fewer than 99 employees and the Distribution, Retail, and Services industries are relatively underdeveloped with respect to usage of incentive programs.

Another opportunity can be to focus on companies who plan to increase their expenditure for motivational items in the future. About 1 in 3 companies who participated in this survey plan to increase their expenditure for motivational items in 2001. However, the planned increases are not uniform across all company sizes or industry groups. Based on survey participants' responses, suppliers of incentives should consider focusing on the Financial/ Transportation and Manufacturing industries because these groups plan to increase their spending on motivational items in 2001.

Replacing cash as an incentive is another opportunity for suppliers. Cash continues to be a popular incentive, with about 7 out of 10 companies using cash in the most recent survey. To offset the appeal of cash as an incentive, suppliers of incentives need to make a convincing case that demonstrates the effectiveness of non-cash incentives. Relevant testimonials or case studies, if available, can make a compelling argument in support of non-cash incentives. The Retail industry might offer a specific opportunity since the Retail industry is over-developed in terms of using cash as an incentive and is under-developed with respect to using non-cash incentives.

The use of the Internet is a new area explored in the 2000 survey. The Internet can be both a threat and an opportunity for suppliers of incentives. As shown in the Summary and Details sections, about 1 in 6 companies used the Internet for motivational programs in 2000. Since a primary reason for using the Internet was to source vendors or suppliers of motivational items, suppliers of incentives should be sure to have a presence on the Internet via a Web site. In addition, their company name should appear when Internet users use a search engine to find incentive suppliers.

Another Internet-related opportunity for suppliers could be to promote the use of incentives to build Web site traffic. According to this survey, 83 percent of the companies have a Web site but only 16 percent of these companies use incentives to build traffic to their Web site. Suppliers of incentives may wish to focus on educating non-users of incentives about the value of using incentives to build Web site traffic.

From this report writer's experiences outside of this project, it is apparent that many companies desire to increase their use of the Internet, for both business building and business efficiency reasons. However, the companies do not know *how* to drive customers and potential customers to their site – an area that falls squarely into the world of incentive programs.

Details

*Bases vary, by question, because
not every respondent answered
every question.*

Question: *Does your organization presently motivate consumers, company salespeople, dealers, distributors or non-sales employees with merchandise and/or travel? This does not include advertising specialties such as key chains, luggage tags, pens, etc., which are given out without performance requirements.*

Table 1a							
	Total Respondents, %	No. of Company's Employees, % Responding					
		1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1,000+
Total Companies		93	71	62	173	240	125
Yes	32	7	20	21	30	40	53
No	68	93	80	79	70	60	47
	100%	100%	100%	100%	100%	100%	100%

If no, have you made such offers within the past two years?

Table 1b							
	Total Respondents, %	No. of Company's Employees, % Responding					
		1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1,000+
Total Companies		82	54	48	115	134	57
Yes	4	5	7	2	3	5	2
No	96	95	93	98	97	95	98
	100%	100%	100%	100%	100%	100%	100%

The following tables are the results of the same question cross-tabbed by the nature of the respondent organization's business.

Table 1c	Principal Product or Service, % Responding						
	Total Respondents, (%)	Mfg.	Dist.	Retail	Svc	Finance/ Trans	Other
Total Companies		202	45	82	226	114	89
Yes	32	39	27	27	27	32	27
No	68	61	73	73	73	68	73
	100%	100%	100%	100%	100%	100%	100%

If No, have you made such an offer within the past two years?

Table 1d	Principal Product or Service, % Responding						
	Total Respondents, %	Mfg.	Dist.	Retail	Svc	Finance/ Trans	Other
Total Companies		119	23	58	161	71	60
Yes	4	3	4	7	2	7	3
No	96	97	96	93	98	93	97
	100%	100%	100%	100%	100%	100%	100%

The codes used in the headings for the principal product or services are:

Table 1e		
Code	Industry	SIC Codes
Mfg	Manufacturing/ Importing	20 – 39
Dist	Distributor/ Wholesaler	50 – 51
Retail	Retailer	52 – 58
Svc	Services	70 – 89
Fin/ Trans	Financial Services/ Transportation/ Communications/ Insurance/ Real Estate	40 – 49 (excluding 43) 60 65
Other	Other including Construction, Mining, Agriculture, etc.	1 -17

Question: *Indicate for which applications your company uses merchandise and/ or travel incentives.*

Table 2a	Employees in Organization, % Responding						
	Total Respondents, (%)	1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1,000+
Consumer/ User Promotions	44	20	17	21	52	46	51
Sales Incentives	64	20	33	57	63	69	75
Dealer Incentives	33	20	17	29	35	33	36
Business Gifts	57	50	44	43	67	58	55
Non-Sales Employee Recognition Awards	62	30	33	64	60	63	72

Table 2b	Principal Product or Service, % Responding						
	Total Respondents, (%)	Mfg.	Dist.	Retail	Svc	Fin/ Trans	Other
Consumer/ User Promotions	44	48	65	42	38	49	31
Sales Incentives	64	75	78	69	51	63	44
Dealer Incentives	33	48	35	31	16	32	23
Business Gifts	57	66	48	35	62	54	50
Non-Sales Employee Recognition Awards	62	59	48	46	73	61	77

Question: Please indicate your best estimate regarding what percentage was used for the items listed.

Table 3.	Percent of Total Expenditures	Employees in Organization					
		1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1,000 +
Consumer/ User Promotions	16	0	15	16	25	17	18
Sales Incentives Merchandise	15	34	8	27	23	19	18
Sales Incentives Travel	18	33	19	17	5	13	19
Dealer Incentives Merchandise	16	0	8	2	12	6	3
Dealer Incentives Travel	15	0	4	1	2	4	5
Non-Sales Merchandise	9	20	26	14	16	22	19
Non-Sales Travel	4	0	2	4	2	3	4
Business Gifts	7	13	18	19	15	16	14
	100	100	100	100	100	100	100

Question: *Will your total budget for motivational items increase, decrease or remain the same in 2001?*

Table 4a	Employees in Organization, % Responding						
	Total Respondents, %	1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1000+
Increase	35	38	38	57	36	34	32
Decrease	5	12	0	0	7	3	8
Remain Same	60	50	62	43	57	63	60
	100	100	100	100	100	100	100

Table 4b	Principal Product or Service, % Responding						
	Total Respondents, %	Mfg.	Dist.	Retail	Svc	Fin/ Trans	Other
Increase	35	37	30	28	31	41	44
Decrease	5	11	0	4	2	3	4
Remain Same	60	52	70	68	67	56	52
	100	100	100	100	100	100	100

Question: *From which of the following sources have you obtained merchandise or travel for motivational programs in the last 12 months?*

Table 5a	Employees in Organization, % Responding						
	Total Respondents, %	1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1,000+
Direct from Manufacturer	36	25	5	27	46	31	34
Local Retail Store	36	5	42	55	38	33	32
Corporate Travel Agency	30	25	8	9	17	3	52
Sales Promotion/ Advertising Agency	25	0	8	18	27	25	27
Incentive Company/ Incentive House	35	25	42	18	25	4	38
Promotional Products Distributor	37	25	5	9	38	36	4
Direct Purchase (Hotel, Airline, etc.)	18	25	8	9	15	2	22
Premium Representative	14	0	0	0	13	11	25
Retail Travel Agency	13	25	42	27	1	6	14
Mail Order House	13	25	0	18	19	11	13
Premium Jobber/ Distributor	12	0	8	18	1	19	16
Internet (e-commerce)	15	0	0	18	21	12	14

Table 5b	Principal Product or Service, % Responding						
	Total Respondents, %	Mfg.	Dist.	Retail	Svc	Finance/ Trans	Other
Direct from Manufacturer	36	44	37	47	31	19	4
Local Retail Store	36	24	42	42	48	43	2
Corporate Travel Agency	3	36	16	37	19	41	3
Sales Promotion/ Advertising Agency	25	25	11	37	19	35	15
Incentive Company/ Incentive House	35	35	58	32	37	19	4
Promotional Products (ad specialty) Distributor	37	38	42	11	42	35	45
Direct Purchase (Hotel, Airline, etc.)	18	19	11	26	21	16	15
Premium Representative	14	18	0	5	19	11	2
Retail Travel Agency	13	1	5	16	12	22	15
Mail Order House	13	9	11	0	17	16	25
Premium Jobber/ Distributor	12	14	11	0	12	19	0
Internet (e-commerce)	15	19	5	5	21	11	5

Note: Columns may not add to 100 percent due to multiple responses.

Note: The results that follow are from those respondents who indicated in the previous two questions they are presently using or have used merchandise and/or travel within the past two years.

Question: *Which of the items listed below do you use to motivate consumers/users, salespeople, dealers, distributors or non-sales people?*

Table 6a	Employees in Organization, % Responding						
	Total Respondent, %	1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1000+
Discounts or Rebates	57	67	47	43	68	52	61
Merchandise	71	33	65	71	72	71	79
Group travel	42	22	29	36	43	33	63
Individual travel	47	22	24	50	47	45	57
Time off from Job	47	33	53	57	59	39	46
Cash awards	69	33	88	86	76	81	81
Gift certificates (merchandise)	32	33	35	57	79	69	79
Debit cards	14	11	18	14	28	19	21
Gift certificates (travel)	35	11	24	29	36	26	42

Table 6b	Principal Product or Service, % Responding						
	Total Respondents, %	Mfg.	Dist.	Retail	Svc	Finance/Trans	Other
Discounts or Rebates	57	62	44	77	51	50	60
Merchandise	71	82	83	69	62	70	52
Group travel	42	50	48	35	33	45	40
Individual travel	47	48	61	58	46	43	32
Time off from Job	47	38	26	46	57	53	52
Cash awards	69	79	74	89	75	73	88
Gift certificates (merchandise)	32	70	65	69	74	70	64
Debit cards	14	22	22	23	18	23	20
Gift certificates (travel)	35	31	26	39	34	38	24

Note: Column totals are more than 100% due to multiple responses.

Question: *Please indicate how effective you have found each of the items in reaching your marketing and sales goals and non-sales personnel goals.*

Table 7a	How Effective, % Responding					
Marketing/ Sales Goals	Extremely	Very	Fairly	Some-what	Not Very	Not at All
Discounts or Rebates	17	32	26	13	9	3
Merchandise	9	34	34	13	6	4
Group travel	23	26	16	10	11	14
Individual travel	15	43	16	7	10	9
Time off from Job	23	36	13	8	9	11
Cash awards	34	42	15	5	2	2
Gift certificates (merchandise)	7	38	38	9	5	3
Debit cards	2	16	8	10	16	48
Gift certificates (travel)	6	28	25	10	15	16

Table 7b	How Effective, % Responding					
Non-Sales Personnel Goals	Extremely	Very	Fairly	Some-what	Not Very	Not at All
Discounts or Rebates	12	27	23	11	10	17
Merchandise	11	36	27	16	3	7
Group travel	10	22	18	10	9	31
Individual travel	23	30	10	11	5	21
Time off from Job	27	34	19	7	6	7
Cash awards	35	36	19	4	2	4
Gift certificates (merchandise)	14	40	31	9	2	4
Debit cards	4	17	8	13	10	48
Gift certificates (travel)	12	23	21	10	5	29

Question: *From which of the following sources have you obtained merchandise or travel for motivational programs in the last 12 months?*

Table 8	Respondent Job Function, % Responding				
	Total Respondents, %	Owner/ Sr. Mgt.	Sales	Marketing	Human Resources
Direct from Manufacturer	36	33	46	43	22
Local Retail Store	36	33	31	30	52
Corporate Travel Agency	30	24	28	43	33
Sales Promotion/ Advertising Agency	25	28	28	21	11
Incentive Company/ Incentive House	35	40	26	38	26
Promotional Products Distributor	37	29	44	40	44
Direct Purchase (Hotel, Airline, etc.)	18	23	21	11	11
Premium Representative	14	5	18	30	7
Retail Travel Agency	13	20	10	11	11
Mail Order House	13	16	18	6	7
Premium Jobber/ Distributor	12	9	16	11	15
Internet (e-commerce)	15	8	15	21	19

Question: *How do you currently use the Internet in relation to your incentive program(s)?*

Table 9a	No. of Employees in Organization, % Responding						
	Total Respondents, %	1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1000+
To source vendors/ suppliers	48	86	50	29	59	41	45
To communicate the program to participants	31	0	30	0	29	35	40
To purchase merchandise/ services	30	0	30	29	37	27	30
To obtain information on creating an incentive program	26	29	20	29	42	15	30
To purchase travel-related items	20	14	10	14	27	15	25
To facilitate redemptions of awards	7	0	10	0	7	6	10
To administer the program	6	0	0	0	5	9	8
Other	17	0	0	29	10	26	15

Table 9b	Principal Product or Service, % Responding						
	Total Respondents, %	Mfg.	Dist.	Retail	Svc	Fin/ Trans	Other
To source vendors/ suppliers	48	41	62	63	44	48	53
To communicate the program to participants	31	41	15	13	35	21	40
To purchase merchandise/ services	30	32	31	25	33	35	20
To obtain information on creating an incentive program	26	28	15	25	28	31	20
To purchase travel-related items	20	13	15	13	28	31	20
To facilitate redemptions of awards	7	9	0	6	7	3	13
To administer the program	6	7	0	6	12	0	7
Other	17	17	23	19	14	21	7

Question: *If your organization has a Website, do you use incentives to build traffic to your Website?*

Table 10a	Have Website	Use Incentives	No. of Employees in Organization, % Responding					
			1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1000 +
Yes	83%	16%	0	0	0	16	19	16
No	17%	84%	0	100	100	84	81	84
Total			100%	100%	100%	100%	100%	100%

Table 10b	Have Website	Use Incentives	Principal Product or Service, % Responding					
			Mfg.	Dist.	Retail	Svc	Fin/Trans	Other
Yes	83%	16%	21	7	28	14	9	6
No	17%	84%	79	93	72	86	91	94
Total			100%	100%	100%	100%	100%	100%

Note: The following question was asked of those respondents who are not presently using merchandise or travel incentives.

Question: *Has your company used merchandise or travel incentives in the past 2 years?*

Table 11a	No. of Employees in Organization, % Responding						
	Total Respondents, %	1 – 4	5 – 9	10 – 19	20 – 99	100 – 999	1000 +
Yes	4	5	7	2	3	5	2
No	96	95	93	98	97	95	98
	100%	100%	100%	100%	100%	100%	100%

Table 11b	Principal Product or Service, % Responding						
	Total Respondents, %	Mfg.	Dist.	Retail	Svc	Fin/ Trans	Other
Yes	4	3	4	7	2	7	3
No	96	97	96	93	98	93	97
	100%	100%	100%	100%	100%	100%	100%

Question: *If your organization has not used merchandise or travel incentives within the past 2 years or has never used them, please indicate why.*

Table 11c	
Concern about cost	48%
Making program fair to all employees/ customers	25%
Uncertain about the outcome	21%
Uncertain about the kind of incentives to offer	21%
Don't know enough about incentive programs	21%
Management resistance	18%
Legal/ liability issues	16%
Don't know how to measure results	13%
Won't be able to administer	12%

Classification Data (All Respondents)

Question: *What is the principal product or service of your organization?*

Table 12a

	SIC Codes	% Responding
Manufacturing	20 – 39	26%
Services	70 – 89	30%
Transportation/ Communications/ Insurance/ Real Estate	40 – 49 & 60 – 65 excluding 43	15%
Retailer	52 – 58	11%
Other	1 - 17	12%
Distributor/ Wholesaler	50 - 51	6%
		100%

Question: *What is your title?*

Table 12b

	% Responding
Owner/ Senior Management	42%
Sales	12%
Marketing	14%
Human Resources	15%
Other/ No answer	17%
	100%

Question: *How many employees are there in your organization WORLDWIDE?*

Table 12c

	% Responding
1 – 4	12%
5 – 9	10%
10 – 19	8%
20 - 99	23%
100 – 999	31%
1,000 +	16%
	100%

Employee Counts for Reporting Categories

Source: Dun & Bradstreet

Table 13a

No. of Employees	Employee Counts	
	No. of Businesses	% of Businesses
1 – 4	6,966,126	65.8%
5 – 9	1,604,214	15.1%
10 – 19	929,116	8.8%
20 – 99	905,773	8.5%
100 – 999	180,812	1.7%
1000 +	9,394	0.1%
Total	10,595,435	100.0%

Table 13b

Description	Major Industry Groups	
	No. of Businesses	% of Businesses
Manufacturing	619,808	5.6%
Distributor	670,698	6.1%
Retail	2,178,177	19.8%
Services	4,374,353	39.7%
Fin/ Trans	1,413,472	12.8%
Other	1,766,631	16.0%
Total	11,023,139	100.0%

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