

**National Survey of
Presentations Readers**

Presentations

TECHNOLOGY AND TECHNIQUES FOR EFFECTIVE COMMUNICATION

2004
Report of findings

Table of contents

Executive summary	3
Project methodology and demographics	6
Key findings.....	7-9
Reader involvement with presentation creation and delivery.....	10
Technology used to create presentations	11-13
Technology used to deliver presentations.....	14-17
Media used in presentations	18
Reasons for creating/delivering presentations.....	18
Purchasing roles, process and decision criteria	19
How and where presentation products are purchased	20
Use and intent to purchase presentation services.....	20
Influence of local dealers/systems integrators/VARs on presentation product purchasing	20
2005 purchasing intentions.....	21-22
Travel	23
Reader involvement with <i>Presentations</i> magazine.....	23-24
Readership of other magazines	25
Other information sources	26
Presentations.com	26

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Project methodology and demographics

Presentations magazine commissioned VNU Business Publications Research to conduct their annual comprehensive readership study. The study was done to learn more about readers' information needs as well as their plans, roles, and processes for purchasing presentation-related equipment, materials and services.

The survey was conducted online in May of 2004. An email invite containing a link to the Web-based survey was sent to a random selection of 31,500 subscribers. The email invite was successfully sent to 30,015 subscribers on April 28, 2004, and 1,019 usable responses were received by the project's close, May 14, for a response rate of 3.4%. This allows for projections to the magazine's readership with a 3.05% margin of error at the 95% confidence interval.

Below is a table illustrating the demographics of the readers responding and participating in the study.

Respondent demographics

By primary job function

Education.....	21.7%
Sales/Mktg/Advertising	14.4
Presentation Management	13.4
Training/Human Resources	12.5
Corporate/Gen Mgmt.....	10.7
MIS/DP/Syst Mgmt/Technical	5.8
Other Consulting	5.2
Consulting (Presentations)	4.0
Engineering/R&D.....	2.9
Other	9.4

By industry

Corporate/Industrial	27.5%
Education	24.7
Government	11.2
Consulting (other)	7.8
Religious Organization	7.2
Medical	6.0
Advertising/Media	3.9
Creative/Production Services	3.7
Consulting (Presentations)	3.5
Dealers/Distributors/VAR's	
Software/Systems Integrators.....	3.5
Other	0.9

By size

1 to 99 Employees	35.7%
100 to 999 Employees	26.5
1,000 to 9,999 Employees	23.0
10,000 or More Employees.....	14.8

Key findings

Reader involvement with the purchasing process

- 85.9% determine need.
- 66.9% evaluate products and services.
- 46.2% advise in supplier selection.
- 80.0% of *Presentations* readers' purchases are approved by their department budget and require no additional approval.
- 34.2% have purchased a product or service after seeing it in *Presentations*.

Reader involvement with creating presentations

- Readers of *Presentations* will create 2.14 million presentations during the next 12 months.
- The average reader creates 30 presentations per year.

Technology used to create presentations

- 96.8% of readers indicated they sometimes use presentation software (PowerPoint, Astound, Freelance Graphics, etc.)
- 62.7% use multi-media authoring software.
- 84.3% use image-editing software.
- 58.9% use video-editing software.
- 56.6% use sound-editing software.
- 60.2% use inkjet printers often or all of the time.
- 79.3% use laser printers often or all of the time.
- 94.3% use a digital camera.
- 59.2% use a digital video camcorder.
- 95.2% use clip art and/or stock photos.
- 81.1% use a CD-R/CD-RW drive often or all of the time.
- 69.5% use a DVD-R/DVD-RW.
- 23.5% use MAC O/S.
- 92.1% use Windows O/S.
- 31.4% of readers currently use creation skills training.
- 21.5% currently use outside creative production services.

Executive summary

Effective communication is critically important to all organizations regardless of size or industry. The need to create and deliver high-quality presentations and the broad array of technologies available with which to do so provides for a dynamic and growing presentation industry.

Presentations magazine has been serving the presentation industry since 1988. During that time, there have been many technological advancements and the industry has changed significantly. Many professionals are responsible for creating and delivering presentations and are using powerful software and hardware that didn't exist even a few years ago. The demand for information on new technology and techniques for effective communication has only changed in that it has become stronger and this trend is likely to continue.

Presentations magazine subscriber purchasing intentions for products and services is strong in 2005. Purchasing plans for specific products by *Presentations* subscribers has increased from last year in nearly all categories, and organizations' budgets have increased.

Organizations represented by readers of *Presentations* magazine are projected to spend \$14.6 billion on presentation products and services in 2005. Subscribers reported their individual purchasing power to be \$3.2 billion.

The data collected and analyzed in this report reflects purchasing intentions through 2005. The projections made to the circulation are for *Presentations'* 75,000 subscribers and the approximately 59,894 organizations they represent.

Key findings (con't)

Reader involvement with delivering presentations

- Readers will deliver 2.08 million presentations during the next 12 months.
- The average reader delivers 32 presentations per year.

Technology used to deliver presentations

- 75.5% of readers use a notebook computer often or always.
- 28.0% sometimes, often or always use a wireless projector.
- 54.0% use an ultraportable projector.
- 80.0% use a portable projector.
- 75.1% use a meeting room projector.
- 49.9% use a large-venue projector.
- 28.4% use a document camera.
- 56.9% use a handheld remote control often or always.
- 73.1% use external multimedia speakers.
- 39.4% use an electronic whiteboard.
- 31.1% use a plasma monitor.
- 32.0% use an LCD monitor.
- 29.2% use a CRT monitor.
- 72.2% use email.
- 50.1% use a room-control system.
- 17.7% use an audience-response system.
- 40.0% use a videoconferencing system.
- 40.3% currently use webconferencing services

Key findings (con't)

Media used to deliver presentations

- 97.5% of readers use computer based slideshows.
- 72.5% use handouts.

Presentation purposes

- 67.1% of readers create presentations for training.
- 67.4% create presentations for meetings.
- 51.2% create presentations for professional conferences.
- 41.4% create presentations for sales/marketing.

Travel

- The average reader takes 10.64 trips per year to deliver presentations.
- Readers spend 18.59 nights in hotels each year while traveling to present.
- 23.4% determine where off-site meetings are held.

Skills training

- 31.4% of readers use presentation creation skills training.
- 31.3% use presentation delivery skills training.

Reader involvement with *Presentations magazine*

- 97.9% of readers have read one or more of the last four issues.
- 75.3% spend 30 minutes or more reading a typical issue.
- Readers pass *Presentations* to 129,675 additional readers on average each month.
- 66.7% of readers have visited a Web site listed in editorial or advertisements.
- 98.9% take action after reading *Presentations*.

Involvement with presentation creation and delivery

Presentations readers create and deliver an enormous number of presentations. Readers create an estimated 2.14 million presentations, and deliver an estimated 2.08 million each year.

- Readers personally create an average of 30.22 presentations a year.
- 23.9% of readers create presentations exclusively for their own use.
- 14.4% of readers create presentations exclusively for other peoples use.

- Readers personally deliver an average of 32.25 presentations a year.
- 97.3% deliver presentations that they have created.
- 24.0% deliver presentations that were created by a staff member.
- 9.9% deliver presentations created by an in-house media service, AV, graphics or presentation department.
- 4.4% use an outside service bureau or design firm to create their presentations.
- 5.1% use freelance designers.

- 44.3% of readers manage or supervise an average of 6.82 employees who create presentations.
- 42.4% manage or supervise an average of 11.92 employees who deliver presentations.

- 47.7% of readers are employed by organizations with a media services, AV, graphics or presentations department.

Number of presentations created and delivered.

Create	2004	2003	2002	2001	2000	1999
12-9 presentations	22.9%	27.9	32.8	33.3	33.8	30.8
10-19 presentations	28.2	28.7	29.4	27.0	26.8	29.7
20+ presentations	48.9	43.4	37.8	39.7	37.4	36.0

Deliver	2004	2003	2002	2001	2000	1999
1-9 presentations	28.4%	33.0	40.9	36.5	34.3	35.6
10-19 presentations	22.4	22.9	21.0	21.8	19.8	19.6
20+ presentations	49.2	44.1	38.1	41.7	36.2	35.0

Technology used to deliver presentations

Desktop computer	2004	2003	2002	2001	2000	1999
Always/Almost always	33.8%	34.7	25.2	24.9	25.9	29.8
Often	14.6	13.5	17.5	18.0	18.0	18.3
Sometimes	24.9	29.1	28.2	29.3	28.4	27.6
Never	26.7	22.7	29.1	27.7	27.8	23.9

Graphics workstation	2004	2003	2002	2001	2000	1999
Always/Almost always	4.1%	4.7	4.0	4.3	4.2	4.8
Often	3.7	3.3	4.1	4.7	5.0	5.4
Sometimes	8.7	12.6	9.3	9.4	9.8	11.8
Never	83.5	79.3	82.6	81.7	81.1	78.0

Notebook computer	2004	2003	2002	2001	2000	1999
Always/Almost always	60.3%	54.9	61.5	57.1	50.9	46.3
Often	15.2	19.0	16.1	16.8	17.6	17.5
Sometimes	15.5	16.1	10.9	12.7	15.4	16.3
Never	9.0	9.9	11.5	13.4	16.1	19.9

Tablet PC	2004	2003	2002	2001	2000	1999
Always/Almost always	1.7%	2.4	-	-	-	-
Often	2.2	1.6	-	-	-	-
Sometimes	6.4	5.2	-	-	-	-
Never	89.8	90.8	-	-	-	-

Graphics tablet	2004	2003	2002	2001	2000	1999
Always/Almost always	1.5%	1.1	-	-	-	-
Often	1.6	2.4	-	-	-	-
Sometimes	5.7	5.7	-	-	-	-
Never	91.3	90.9	-	-	-	-

Handheld computer/PDA	2004	2003	2002	2001	2000**	1999**
Always/Almost always	3.3%	1.7	2.5	1.9	2.1	2.3
Often	3.3	4.0	3.3	3.1	2.7	1.5
Sometimes	13.0	13.5	9.8	8.5	6.3	6.3
Never	80.4	80.7	84.5	86.4	88.9	89.9

*Asked as 'Palmtop computer' **Asked as 'Handheld computer'

Wireless projector	2004	2003	2002	2001	2000	1999
Always/Almost always	6.2%	6.0	-	-	-	-
Often	7.4	6.2	-	-	-	-
Sometimes	14.4	14.2	-	-	-	-
Never	72.0	73.6	-	-	-	-

Networked projector	2004	2003	2002	2001	2000	1999
Always/Almost always	15.0%	12.1	-	-	-	-
Often	12.1	11.6	-	-	-	-
Sometimes	16.6	18.9	-	-	-	-
Never	56.3	57.4	-	-	-	-

Ultraportable projector	2004	2003	2002	2001	2000	1999
Always/Almost always	16.6%	19.5	21.4	14.6	9.3	-
Often	15.0	13.9	14.6	10.6	10.9	-
Sometimes	22.4	23.3	18.3	15.9	14.7	-
Never	46.0	43.3	45.7	58.9	65.1	-

Technology used to deliver presentations (con't)

Portable projector	2004	2003	2002	2001	2000	1999
Always/Almost always	32.4%	28.4	33.6	24.6	24.5	20.9
Often	23.6	25.7	22.8	18.2	18.8	14.9
Sometimes	24.1	26.9	19.6	17.3	16.0	21.1
Never	20.0	19.0	24.0	40.0	40.7	43.1

Meeting room projector	2004	2003	2002	2001	2000	1999
Always/Almost always	18.8%	20.6	23.0	27.8	28.6	30.4
Often	23.7	21.2	22.6	23.5	24.0	27.6
Sometimes	32.5	34.7	26.2	25.3	24.1	22.4
Never	24.9	23.5	28.3	23.4	23.3	19.7

Large-venue projector	2004	2003	2002	2001	2000	1999
Always/Almost always	9.3%	8.6	10.3	9.1	9.3	12.5
Often	12.2	10.8	9.9	10.4	11.8	14.7
Sometimes	28.3	30.3	26.2	22.5	22.9	25.5
Never	50.1	50.4	53.5	58.1	56.1	47.4

Desktop computer monitor	2004	2003	2002	2001	2000	1999
Always/Almost always	17.0%	16.4	12.7	14.5	15.6	15.1
Often	10.9	12.0	12.8	13.4	15.2	16.1
Sometimes	33.3	43.0	32.0	31.4	31.2	32.6
Never	38.9	28.6	42.6	40.7	38.1	36.1

Plasma monitor	2004	2003	2002	2001	2000	1999
Always/Almost always	3.7%	4.9	-	-	-	-
Often	6.4	5.8	-	-	-	-
Sometimes	21.0	21.7	-	-	-	-
Never	68.9	67.6	-	-	-	-

LCD monitor	2004	2003	2002	2001	2000	1999
Always/Almost always	5.4%	5.2	-	-	-	-
Often	5.9	7.0	-	-	-	-
Sometimes	20.7	20.1	-	-	-	-
Never	68.0	67.6	-	-	-	-

CRT monitor	2004	2003	2002	2001	2000	1999
Always/Almost always	5.1%	5.4	-	-	-	-
Often	6.5	8.1	-	-	-	-
Sometimes	17.6	20.4	-	-	-	-
Never	70.8	66.1	-	-	-	-

Document camera	2004	2003	2002	2001	2000	1999
Always/Almost always	1.6%	1.8	3.3	3.4	4.4	4.3
Often	5.3	7.8	6.5	6.2	6.3	7.5
Sometimes	21.7	19.9	15.7	14.9	14.6	13.7
Never	71.6	70.5	74.5	75.6	74.7	74.5

Overhead projector	2004	2003	2002	2001	2000	1999
Always/Almost always	9.4%	10.3	15.9	18.6	22.6	23.2
Often	14.3	21.7	22.0	27.9	28.2	31.6
Sometimes	37.4	39.1	32.7	30.1	28.0	24.9
Never	39.0	28.9	29.4	23.3	21.2	20.2

Technology used to create presentations (con't)

Image-editing software	2004	2003	2002	2001	2000	1999
Always/Almost always	42.0%	38.7	31.5	30.5	30.0	32.4
Often	23.9	21.9	21.1	20.6	22.4	16.8
Sometimes	18.4	21.9	17.5	19.0	16.6	17.4
Never	15.7	17.4	30.0	29.8	31.0	33.4

Video-editing software	2004	2003	2002	2001	2000	1999
Always/Almost always	15.6%	14.1	12.1	10.6	11.8	12.3
Often	15.5	12.4	11.5	13.1	11.2	11.1
Sometimes	27.8	31.5	21.0	21.4	18.8	21.3
Never	41.1	41.8	55.4	54.9	58.1	55.4

Sound-editing software	2004	2003	2002	2001	2000	1999
Always/Almost always	13.6%	11.6	8.5	7.7	8.6	10.7
Often	11.1	12.8	10.4	10.9	10.3	10.3
Sometimes	31.8	32.0	22.5	24.0	21.8	21.7
Never	43.4	43.6	58.5	57.4	59.2	57.3

Desktop publishing software	2004	2003	2002	2001	2000	1999
Always/Almost always	36.7%	38.8	44.3	45.6	46.1	48.2
Often	21.5	22.5	18.8	19.9	20.1	22.9
Sometimes	26.4	24.2	17.1	18.5	17.2	13.4
Never	15.4	14.5	19.8	16.0	16.7	15.5

Inkjet printer	2004	2003	2002	2001	2000	1999*
Always/Almost always	35.2%	35.8	46.5	47.2	45.7	46.6
Often	25.0	27.1	20.8	23.4	23.7	22.8
Sometimes	25.5	25.2	17.2	16.9	15.9	15.8
Never	14.4	11.9	15.5	12.6	14.7	14.9

*asked as 'Inkjet printer – color'

Laser printer	2004	2003	2002	2001	2000	1999*
Always/Almost always	55.5%	57.1	64.5	64.0	63.2	41.1
Often	23.8	23.9	18.1	19.7	20.4	18.9
Sometimes	13.9	13.1	9.0	8.2	9.2	12.7
Never	6.8	5.9	8.4	8.1	7.2	27.3

*asked as 'Color-laser printer'

Wide-format inkjet printer	2004	2003	2002	2001	2000	1999
Always/Almost always	6.2%	7.5	7.7	7.9	6.9	8.1
Often	9.7	8.5	8.1	7.8	7.1	9.9
Sometimes	19.2	19.2	12.6	13.2	12.4	12.6
Never	65.0	64.9	71.6	71.2	73.7	69.3

Digital camera	2004	2003	2002	2001	2000	1999
Always/Almost always	34.9%	28.4	32.5	26.7	23.9	19.8
Often	33.7	36.1	30.2	30.8	28.8	23.7
Sometimes	25.7	29.7	24.2	28.4	27.6	29.2
Never	5.7	5.8	13.2	14.1	19.8	27.3

Film scanner	2004	2003	2002	2001	2000	1999
Always/Almost always	6.8%	4.2	-	-	-	-
Often	7.6	9.7	-	-	-	-
Sometimes	19.0	20.6	-	-	-	-
Never	66.5	65.5	-	-	-	-

Technology used to create presentations (con't)

Flatbed scanner	2004	2003	2002	2001	2000	1999
Always/Almost always	24.9%	23.2	29.9	30.2	32.2	32.2
Often	32.7	36.4	33.2	34.1	33.2	30.5
Sometimes	33.9	33.5	25.8	25.7	24.9	22.7
Never	8.5	6.9	11.2	10.0	9.6	14.5

Digital video camcorder	2004	2003	2002	2001	2000	1999
Always/Almost always	13.9%	12.2	11.6	9.4	8.8	7.9
Often	17.1	17.7	12.8	12.8	9.6	8.8
Sometimes	28.2	27.9	20.2	18.9	16.8	15.1
Never	40.8	42.1	55.4	58.9	64.8	68.2

Analog video camcorder	2004	2003	2002	2001	2000	1999
Always/Almost always	3.7%	2.9	5.2	6.4	7.1	10.1
Often	5.4	8.4	7.1	9.0	10.0	10.9
Sometimes	21.3	26.9	18.4	19.3	17.5	18.0
Never	69.6	61.7	69.4	65.3	65.5	60.9

Nonlinear video editing	2004	2003	2002	2001	2000	1999
Always/Almost always	8.0%	7.6	7.1	6.7	8.1	8.3
Often	7.3	7.3	6.1	7.4	6.8	7.6
Sometimes	13.9	15.1	10.6	11.2	10.1	12.5
Never	70.9	70.1	76.2	74.6	75.0	71.7

Clip art/stock photos	2004	2003	2002	2001	2000	1999
Always/Almost always	38.1%	34.4	36.4	38.0	35.8	24.1
Often	32.5	35.6	27.8	28.5	30.3	26.6
Sometimes	24.6	25.8	24.6	24.1	23.4	22.1
Never	4.8	4.1	11.2	9.4	10.5	27.2

CD-R/RW drive	2004*	2003*	2002	2001	2000	1999
Always/Almost always	52.6%	46.6	33.4	25.0	19.9	17.7
Often	28.5	30.7	26.1	22.5	20.7	19.1
Sometimes	14.7	16.8	17.1	20.6	19.7	16.2
Never	4.2	5.9	23.5	31.9	39.8	47.1

*CD-R and CD-RW were combined in 2003. Figures prior to 2003 are for CD-R only.

Removable storage drive	2004	2003	2002	2001	2000	1999
Always/Almost always	29.4%	19.1	21.3	22.4	22.9	27.1
Often	18.7	22.3	18.3	18.4	21.3	17.3
Sometimes	24.5	27.3	18.9	19.7	18.6	15.0
Never	27.4	31.3	41.5	39.5	37.2	40.6

DVD-R/RW drive	2004*	2003*	2002	2001	2000	1999
Always/Almost always	27.5%	16.0	5.9	2.2	2.6	1.9
Often	18.6	15.6	6.1	3.2	2.9	2.8
Sometimes	23.4	23.8	9.9	7.6	6.4	6.6
Never	30.4	44.6	78.1	87.0	88.2	88.8

*DVD-R and DVD-RW were combined in 2003. Figures prior to 2003 are for DVD-R only.

Graphics tablet	2004	2003	2002	2001	2000	1999
Always/Almost always	4.5%	4.6	-	-	-	-
Often	6.1	5.6	-	-	-	-
Sometimes	15.0	13.3	-	-	-	-
Never	74.4	76.5	-	-	-	-

Technology used to deliver presentations (con't)

35mm slide projector	2004	2003	2002	2001	2000	1999
Always/Almost always	0.7%	1.7	5.3	5.3	8.6	11.0
Often	3.3	5.9	7.9	12.5	13.6	18.0
Sometimes	16.8	24.2	19.9	22.5	24.6	25.6
Never	79.1	68.2	66.8	59.7	53.2	45.4

Handheld remote control	2004	2003	2002	2001	2000	1999
Always/Almost always	35.6%	28.4	30.1	28.0	25.9	25.1
Often	21.3	23.5	21.7	24.6	23.8	22.2
Sometimes	23.5	27.7	22.4	21.2	21.7	22.2
Never	19.6	20.4	25.7	26.2	28.5	30.5

External multimedia speakers	2004	2003	2002	2001	2000	1999
Always/Almost always	22.4%	17.6	16.5	14.6	14.0	14.1
Often	21.5	22.5	20.0	18.5	18.7	19.0
Sometimes	29.2	34.2	24.6	26.2	24.9	23.6
Never	26.9	25.6	38.9	40.8	42.5	43.2

Electronic whiteboard	2004	2003	2002	2001	2000	1999
Always/Almost always	5.9%	4.7%	4.7	3.4	4.4	2.3
Often	10.3	9.7	9.1	9.4	7.3	9.4
Sometimes	23.2	25.1	22.3	21.6	19.5	16.7
Never	60.6	60.5	64.0	65.5	68.9	71.6

Webconferencing	2004	2003	2002	2001	2000	1999
Always/Almost always	3.1%	3.6	3.1	14.1	12.7	12.2
Often	10.7	9.4	8.2	18.9	17.4	18.5
Sometimes	26.5	26.1	22.0	27.8	26.2	24.2
Never	59.7	61.0	66.7	39.2	43.8	45.2

Webcasting	2004	2003	2002	2001	2000	1999
Always/Almost always	2.3%	1.9	2.5	-	-	-
Often	5.3	7.0	5.0	-	-	-
Sometimes	22.2	16.6	12.1	-	-	-
Never	70.2	74.6	80.5	-	-	-

E-mail	2004	2003	2002	2001	2000	1999
Always/Almost always	12.2%	10.3%	26.3	16.6	-	-
Often	21.4	21.4	19.2	19.4	-	-
Sometimes	38.6	42.1	25.3	26.2	-	-
Never	27.8	26.2	29.2	37.7	-	-

Corporate intranet	2004	2003	2002	2001	2000	1999
Always/Almost always	9.2%	7.7	7.9	7.8	7.2	6.6
Often	16.6	18.4	12.6	13.9	12.0	10.9
Sometimes	28.6	27.3	18.5	20.6	21.3	15.8
Never	45.7	46.5	61.0	57.7	59.5	66.7

Laser pointer	2004	2003	2002	2001	2000	1999
Always/Almost always	24.2%	21.5	26.4	24.4	-	-
Often	18.9	20.4	21.0	20.8	-	-
Sometimes	31.4	34.7	22.9	26.5	-	-
Never	25.4	23.3	29.7	28.3	-	-

Room-control system	2004	2003	2002	2001	2000	1999
Always/Almost always	9.0%	8.7	8.1	6.1	7.1	6.1
Often	13.1	11.8	12.0	10.8	10.0	8.1
Sometimes	27.9	31.3	20.9	22.6	20.2	19.7
Never	49.9	48.2	59.2	60.5	62.8	66.1

Technology used to deliver presentations (con't)

Audience-response system	2004	2003	2002	2001	2000	1999
Always/Almost always	1.6%	0.7	1.6	1.3	1.5	1.4
Often	2.9	3.2	2.9	2.9	2.3	1.9
Sometimes	13.2	14.3	9.9	8.7	7.4	8.5
Never	82.3	81.9	85.7	87.1	88.8	88.1

Videoconferencing system	2004	2003	2002	2001	2000	1999
Always/Almost always	3.4%	3.5	5.0	4.0	4.9	4.4
Often	8.4	8.8	10.3	11.0	9.4	10.5
Sometimes	28.3	30.1	22.2	22.2	22.6	20.3
Never	60.0	57.6	62.4	62.8	63.0	64.9

Audioconferencing system	2004	2003	2002	2001	2000	1999
Always/Almost always	2.8%	2.5	5.1	3.9	4.4	3.2
Often	9.5	9.3	10.1	10.1	9.8	11.0
Sometimes	24.2	28.0	17.4	17.4	16.7	18.3
Never	63.5	60.3	67.3	68.6	69.1	67.4

Videowall	2004	2003	2002	2001	2000	1999
Always/Almost always	1.1%	0.7	0.9	0.9	1.1	1.6
Often	1.3	1.5	2.0	1.6	2.0	1.6
Sometimes	6.0	7.7	5.9	7.1	6.3	6.4
Never	91.7	90.1	91.1	90.5	90.5	90.4

DVD drive	2004	2003	2002	2001	2000	1999
Always/Almost always	11.4%	7.1	7.0	3.0	3.1	1.7
Often	16.1	12.1	10.3	6.0	6.3	4.4
Sometimes	30.3	29.5	15.6	13.0	11.4	10.4
Never	42.2	51.2	67.2	78.0	79.2	83.6

Removable storage drive	2004	2003	2002	2001	2000	1999
Always/Almost always	12.6%	7.6	10.4	9.6	10.3	9.3
Often	16.3	12.2	12.5	13.6	15.4	14.6
Sometimes	28.1	30.9	19.9	19.0	18.7	18.4
Never	43.0	49.3	57.1	57.8	55.5	57.7

CD drive	2004	2003	2002	2001	2000	1999
Always/Almost always	23.9%	28.6	22.5	19.5	16.2	-
Often	28.1	24.2	24.8	23.3	22.1	-
Sometimes	34.6	22.2	22.0	22.2	21.0	-
Never	13.4	25.1	30.7	35.0	40.7	-

Media created and used during presentations

Created	2004	2003	2002	2001	2000	1999
Computer-based slides	97.5%	95.2	88.1	86.2	85.1	80.7
Pro-authored multi-media	24.5	23.0	17.5	16.3	15.6	18.3
35mm slideshows	5.6	11.8	15.1	17.8	22.0	30.3
Overhead transparencies	37.0	46.0	44.3	50.8	58.2	57.2
Video	36.8	35.1	28.0	29.2	28.4	29.2
Flip charts	25.3	32.3	32.9	32.4	35.8	31.0
Handouts	72.5	74.6	75.9	75.8	76.1	70.7

Used to deliver	2004	2003	2002	2001	2000	1999
Computer-based slides	97.7%	95.2	78.3	75.3	74.2	69.4
Pro-authored multi-media	21.0	20.4	17.6	16.7	14.8	16.7
35mm slideshows	5.5	12.5	13.1	15.8	17.6	25.6
Overhead transparencies	36.3	41.0	37.9	43.6	48.1	45.8
Video	40.4	40.2	32.4	32.3	30.7	29.0
Flip charts	30.1	35.5	32.3	31.3	32.6	28.0
Handouts	73.0	73.7	66.2	65.3	66.1	60.1

Reasons for creating and delivering presentations

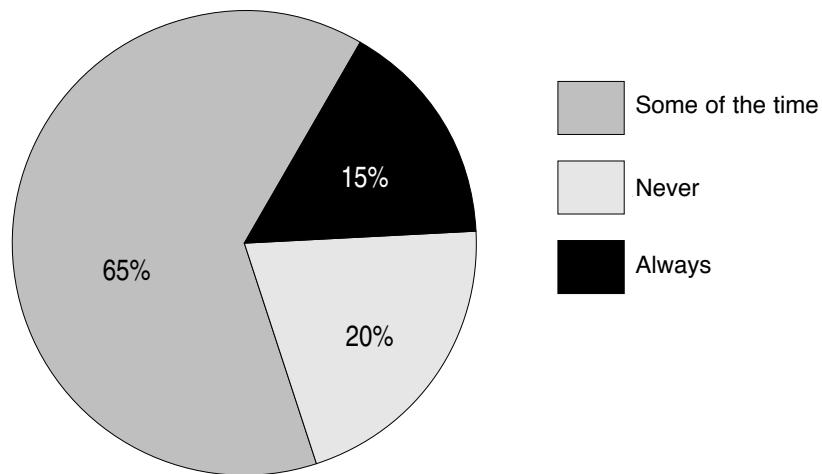
Reasons	2004	2003	2002	2001	2000	1999
Meetings	67.4%	70.6	52.0	53.2	54.7	58.8
Training	67.1	68.8	66.2	65.3	63.9	61.0
Professional conferences	51.2	53.7	39.6	38.9	37.0	40.7
Sales/marketing	41.4	45.8	41.8	42.6	44.9	51.3
Other educational	38.2	38.7	-	-	-	-
Corporate communications	28.6	28.8	26.3	26.8	27.7	29.6
Public relations	25.5	26.1	8.3	9.6	19.4	23.8
Web sites	25.3	27.4	21.1	19.9	17.4	21.3
Trade shows	21.6	23.1	20.4	21.0	23.2	28.4
College-level classes	20.3	20.3	10.3	11.5	18.8	19.1
Religious services	10.8	9.5	-	-	-	-
K-12 classes	10.0	10.2	6.6	6.8	10.4	9.0
Corporate intranets	9.5	9.6	16.6	15.9	7.3	8.8
Information kiosks	9.1	7.8	19.1	20.8	7.4	7.5
Other	2.8	3.7	5.8	4.1	6.0	5.2

Purchasing roles, process and decision criteria

Purchasing roles	2004	2003	2002	2001	2000	1999
Determine need	85.9%	86.4	83.4	83.5	87.0	88.9
Determine budget	46.2	47.1	45.0	46.4	49.4	58.4
Determine specifications	64.0	67.0	62.2	63.5	65.5	71.6
Request/review bids	45.7	48.5	47.2	48.2	54.2	61.8
Determine where off-site meetings held	23.4	24.9	25.4	25.7	26.8	-
Advise in supplier selection	46.2	47.0	43.3	43.6	47.8	65.3
Make final purchasing decision	41.0	42.3	39.3	41.4	42.7	57.2
Authorize/approve purchase	34.8	33.5	33.8	33.6	37.2	50.9
Evaluate products/services	66.9	68.6	62.1	62.3	65.4	76.5

How purchases are approved

“Considering your organization’s typical purchasing process, how frequently are purchases approved by your department budget, requiring no higher approval?”



How/where presentation products are purchased

Readers were asked to share how they purchase presentation products by indicating all sources they use.

Where they buy	2004	2003	2002	2001	2000
Online	55.0%	58.5	49.5	44.3	41.0
Mail order/catalog	40.9	46.7	55.4	57.5	61.8
Retail stores	36.9	43.8	45.0	43.6	45.2
Office supply catalog	35.1	42.6	46.8	47.0	49.7
Direct from manufacturer	43.9	39.3	-	-	-
Contracted/authorized dealers	31.1	36.4	-	-	-
AV dealers (VARs)	29.0	28.8	37.0	36.5	42.5
Request through purchasing department	20.2	25.2	-	-	-
Request through MIS/IT	20.3	21.2	-	-	-
Conferences/tradeshows	9.8	11.9	-	-	-
Other	0.6	1.0	10.4	10.4	9.2

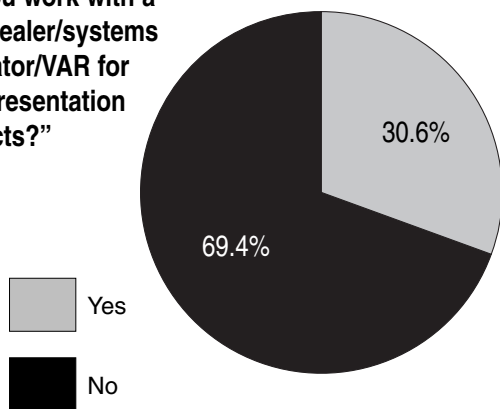
Presentation services

Readers were asked to share what presentation services they currently use or plan to purchase.

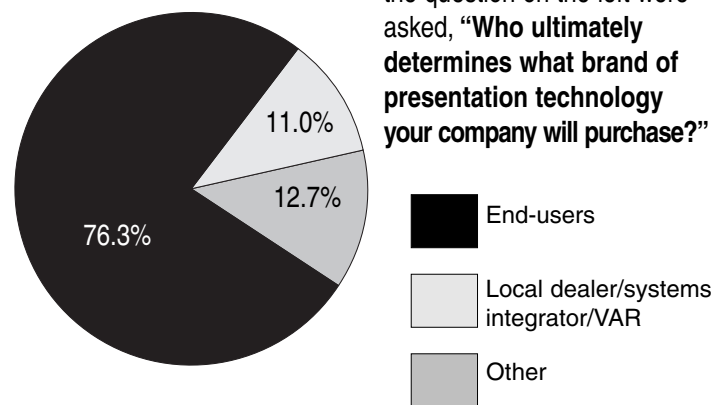
	2004	2003	2002	2001	2000
Use presentation creation skills training	31.4%	28.6	17.8	19.0	19.0
Plan to purchase creation-skills training	21.7	19.5	9.0	12.6	12.6
Use presentation delivery skills training	31.3	30.0	20.5	20.8	20.8
Plan to purchase delivery-skills training	18.7	16.2	7.2	11.0	11.0
Use outside creative/production services	21.5	22.7	11.7	15.3	15.3
Plan to purchase outside creative/production services	21.2	17.2	7.4	10.0	10.0
Use webconferencing services	18.5	17.3	12.4	8.8	8.8
Plan to purchase webconferencing services	19.9	17.6	7.9	9.6	9.6
Use webcasting services	14.0	12.0	7.6	-	-
Plan to purchase webcasting services	19.2	17.4	6.7	-	-

Influence of local dealers/systems integrators/VAR's

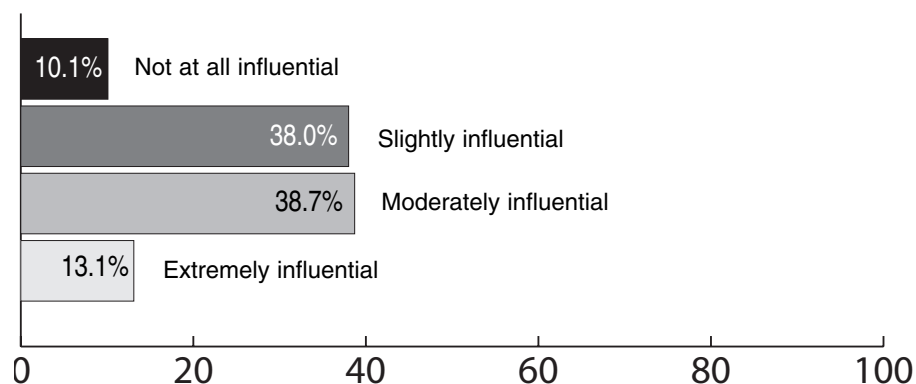
Readers were asked, "Do you work with a local dealer/systems integrator/VAR for your presentation products?"



Readers who answered yes to the question on the left were asked, "Who ultimately determines what brand of presentation technology your company will purchase?"



Readers who indicated they work with a local dealer/systems integrator/VAR were asked, "How influential is your local dealer/systems integrator/VAR in determining what brand of presentation technology your company will purchase?"



Technology used to create presentations

Macintosh O/S	2004	2003	2002	2001	2000*	1999
Always/Almost always	11.9%	11.0	13.8	15.2	16.1	-
Often	3.5	3.1	4.5	3.7	5.5	-
Sometimes	8.2	11.0	8.5	8.8	8.4	-
Never	76.5	74.9	73.3	72.3	70.0	-

*asked as 'Apple O/S'

Windows O/S	2004	2003	2002	2001	2000	1999
Always/Almost always	83.0%	82.7	74.8	74.0	68.2	-
Often	5.2	5.4	6.6	6.8	8.9	-
Sometimes	4.0	4.6	5.0	6.3	6.7	-
Never	7.9	7.2	13.6	12.9	16.1	-

Desktop computer	2004	2003	2002	2001	2000	1999
Always/Almost always	73.3%	72.8	78.3	79.5	78.7	82.0
Often	13.3	14.7	10.4	10.5	11.0	9.1
Sometimes	8.7	8.4	5.4	5.7	5.8	4.9
Never	4.8	4.0	5.9	4.3	4.4	4.0

Graphics workstation	2004	2003	2002	2001	2000	1999
Always/Almost always	13.6%	14.4	14.1	16.1	16.1	23.5
Often	8.0	7.3	7.9	8.7	8.3	8.8
Sometimes	12.5	14.2	13.7	11.9	15.1	15.3
Never	65.9	64.1	64.3	63.3	60.6	52.4

Notebook computer	2004	2003	2002	2001	2000	1999
Always/Almost always	35.0%	31.8	30.1	27.4	27.5	27.2
Often	24.4	23.4	20.3	21.0	19.8	24.1
Sometimes	26.7	28.0	27.5	28.0	26.4	22.6
Never	13.9	16.9	22.1	23.6	26.2	26.1

Presentation software	2004	2003	2002	2001	2000	1999
Always/Almost always	77.4%	76.3	75.2	74.6	72.1	69.5
Often	13.2	14.2	12.2	11.5	14.4	14.7
Sometimes	6.3	6.7	6.2	8.5	6.7	10.1
Never	3.2	2.8	6.4	5.4	6.8	5.7

Multi-media authoring software	2004	2003	2002	2001	2000	1999
Always/Almost always	20.8%	18.5	14.6	14.9	13.6	15.2
Often	16.0	14.7	14.4	12.9	12.7	13.4
Sometimes	25.9	27.4	23.3	24.1	22.9	24.6
Never	37.3	39.4	47.7	48.2	50.8	46.7

CBT/WBT software	2004	2003	2002	2001	2000	1999*
Always/Almost always	5.0%	4.9	3.2	3.3	2.9	3.5
Often	7.0	6.9	5.2	5.4	5.1	5.2
Sometimes	17.9	16.7	13.3	11.4	11.9	11.6
Never	70.2	71.4	78.3	80.0	80.1	79.8

*asked as 'CBT-authoring software'

2005 purchasing intentions

Presentations readers have a wide spectrum of products, equipment and services at their disposal. To quantify the number of various items that readers intend on purchasing during the coming year, a detailed list of more than 100 products was provided on the survey questionnaire. Products were categorized into major presentation equipment and software groupings.

Percent of respondents intending to purchase one or more units

Audio equipment	2004	2003	2002	2001
Microphones	19.2%	18.9	15.5	16.4
Portable Sound Systems	16.1	12.7	12.0	13.6

Computer hardware & peripherals	2004	2003	2002	2001
Apple desktop computers	13.5%	10.6	10.8	11.8
Apple notebook computers	8.8	8.8	8.4	8.7
Computer monitors, CRT	23.3	26.2	24.2	29.1
Computer monitors, LCD	40.8	37.1	22.6	17.7
Handheld computers/PDAs	30.6	32.6	21.2	20.2
Tablet PCs	13.0	12.9	-	-
Handheld remote controls	23.0	21.7	11.8	12.3
Surge protectors	42.8	41.2	24.9	24.4
Windows-compatible desktops	49.1	51.8	36.8	40.6
Windows-compatible notebooks	49.1	48.4	22.4	35.7

Conference/meeting/distance learning tools	2004	2003	2002	2001
Audience/keypad response systems	3.2%	2.6	1.7	1.8
Audioconferencing systems	6.1	6.9	3.5	4.5
Electronic whiteboards	13.9	12.3	9.1	8.9
Laser pointers	24.9	23.0	12.2	12.5
Room-control systems	8.9	6.0	3.7	4.0
Videoconferencing systems	10.6	9.4	-	-

Display & projection	2004	2003	2002	2001
Document cameras	11.8%	11.7	8.9	9.5
Large-screen rear-projection displays	5.1	5.7	5.1	4.1
Presentation monitors/displays, CRT	5.4	7.8	6.8	8.3
Presentation monitors/displays, gas plasma	5.9	7.2	5.6	4.7
Presentation monitors/displays, LCD	11.9	10.3	-	-
Projector lense	6.6	7.3	3.9	4.1
Projectors, ultraportable	26.3	25.1	17.1	13.6
Projectors, portable	23.6	24.7	17.4	18.6
Projectors, meeting room	13.7	12.2	8.0	10.6
Projectors, large venue/fixed installation	6.6	5.8	3.8	4.5
Scalers	4.1	2.9	2.1	1.5
Videowall cubes	1.6	0.9	1.1	0.5

Furniture, fixtures & accessories	2004	2003	2002	2001
Carrying/shipping cases	26.5%	24.0	15.3	18.9
Mounting/suspension systems	16.2	13.4	7.0	8.1
Racks, stands, carts	21.0	20.2	11.8	14.0
Screens	21.4	19.0	-	-
Workstation furniture	18.2	18.4	14.0	15.8

2005 purchasing intentions (con't)

Drives/media storage	2004	2003	2002	2001
CD/DVD jukeboxes	5.0%	5.2	5.0	6.2
CD/DVD duplicators	17.3	15.5	-	-
CD/DVD printers	10.4	8.2	-	-
CD-R/RW drives	23.7	26.8	-	-
DVD-R/RW/RAM drives	24.1	24.7	-	-
Flash media	21.9	17.6	10.3	-
Removable storage drives	25.2	18.5	14.0	15.3
Web/Online storage	6.4	5.0	4.7	4.0

Media input equipment	2004	2003	2002	2001
Flatbed scanners	30.1%	31.1	22.8	25.4
Film scanners	6.6	7.8	7.8	7.9
Graphic tablets	7.8	7.9	7.6	7.8
Digital cameras	44.0	44.6	-	-

Media output equipment	2004	2003	2002	2001
Color copiers/printers	19.5%	19.6	11.5	13.4
Color inkjet printers, desktop	25.4	27.1	22.9	24.2
Color inkjet printers, wide-format	9.7	8.6	7.3	8.1
Laser printers	34.2	30.7	12.2	12.5
Poster/sign-making equipment	6.5	5.4	3.8	3.4

Video equipment	2004	2003	2002	2001
Camcorders, analog	1.7%	5.0	3.1	3.9
Camcorders, digital	27.3	25.2	21.9	20.3
Nonlinear video-editing systems	9.6	8.4	6.5	6.8
MPEG encoders	7.7	8.5	5.3	4.8

Software & media	2004	2003	2002	2001
3D animation software	15.3%	16.4	13.5	14.8
CBT authoring software	7.8	8.3	6.9	7.1
Charting software	6.2	7.7	5.5	6.5
Clip/stock media collections	24.2	23.1	-	-
Desktop publishing software	28.9	27.0	-	-
Digital video-editing/effects software	25.0	24.8	17.8/12.8	17.4/13.0
Draw/illustration software	21.8	20.2	19.2	19.6
DVD-authoring software	19.0	19.3	-	-
Image/photo-editing software	29.9	31.5	23.0	26.3
Media management software	12.0	8.8	6.5	6.0
Multimedia authoring software	16.3	15.2	12.0	11.6
Presentation software	34.2	29.0	19.5	19.1
Sound-editing software	14.8	14.2	8.9	8.8
Web-authoring software	18.3	17.6	13.5	13.7

Travel

Presentations readers were asked about their travel and meetings while on the road. Readers spend 18.59 nights in a hotel annually while traveling to present. 83.2% have a hotel budget of \$150 or more per night.

Traveling to present	2004	2003	2002	2001
Average number of trips taken to present per year	10.64	9.95	9.9	7.4
Average hotel nights required per year	18.59	13.55	16.4	17.7

Average hotel budget	2004	2003	2002	2001
Less than \$100 per night	3.1%	-	-	-
\$100-\$149 per night	13.7	-	-	-
\$150-\$199 per night	52.0	-	-	-
\$200 or more per night	31.2	-	-	-

Number of presentations delivered while traveling	2004	2003	2002	2001
1 – 4 per trip	93.6%	92.9	93.2	92.3
5 – 9 per trip	4.7	6.0	4.5	4.9
10 – 14 per trip	1.2	0.4	1.4	1.0
15 or more	0.5	0.7	0.9	1.7

Number of attendees at meetings while traveling to present	2004	2003	2002	2001
1 – 49	56.7%	58.8	66.8	-
50 – 99	21.1	21.3	16.5	-
100 – 499	16.6	15.1	13.7	-
500 – 1000	3.6	2.6	3.0	-
More than 1000	2.0	2.2	0.0	-

Reader involvement with *Presentations* magazine

Subscribers were asked how many of the last four issues of *Presentations* they read.

# of last four issues read	2004	2003	2002	2001	2000	1999
0	2.1%	2.5	1.9	1.9	1.0	0.5
1	2.5	3.8	3.6	4.5	4.5	3.1
2	13.2	11.8	13.1	15.4	16.4	14.1
3	15.0	15.3	17.0	18.2	18.3	17.8
4	67.2	66.6	64.4	60.1	59.8	63.9

Subscribers were asked how much time they spend reading an issue.

Time spent reading each issue	2004	2003	2002	2001	2000	1999
Less than 30 minutes	24.7%	28.9	28.4	29.2	29.7	25.7
30-59 minutes	46.4	45.8	51.5	46.7	47.1	51.9
1-1.4 hours	18.5	16.1	12.2	13.2	12.9	12.8
1.5-1.9 hours	6.8	5.6	5.2	6.7	6.4	5.8
2 hours or more	3.6	3.5	2.7	4.2	3.9	3.8

Pass-along readership

65.0% of readers pass their issue along to an average of 2.66 other people after they're finished reading it. In total, each issue of *Presentations* is read by 204,675 people.

Pass-along	2004	2003	2002	2001	2000	1999
1 other	33.7%	37.6	38.4	34.3	36.4	32.4
2 others	33.1	30.8	35.5	36.4	35.1	35.4
3 others	13.9	14.8	12.3	13.9	13.6	14.6
4 or more	19.3	16.8	13.8	15.4	14.9	17.6

Actions taken after reading *Presentations* magazine

Readers were asked "In the past year, what actions have you taken after seeing interesting editorial/advertising in *Presentations* magazine?"

Actions taken when finished reading	2004	2003	2002
Route/discussed with others	57.8%	60.0	61.3
Filed for future reference	57.4	63.9	60.8
Sent in RSC for more info	14.8	17.6	20.0
Contacted supplier directly	33.1	33.5	30.1
Visited Web site in editorial/ad	66.7	67.4	57.5
Contacted supplier's sales rep/dealer	12.2	14.0	12.7
Recommended product/service	36.0	34.7	29.3
Purchased product/service	34.2	35.6	31.4
Other	1.5	1.2	1.8

What is done with issue after reading *Presentations* magazine

Readers were asked "What do you typically do with your copy of *Presentations* magazine after reading it?"

When finished reading, readers...	2004	2003	2002	2001	2000	1999
Save entire issue	53.8%	48.3	43.3	44.9	45.6	48.6
Save selected articles/ads	25.2	31.5	-	-	-	-
Place in public area	16.7	15.2	13.0	22.7	25.1	20.0
Pass issue on to others	65.0	65.1	62.9	67.8	69.6	73.4
Clip/copy ads	13.7	18.0	19.5	-	-	-
Clip/copy selected articles	38.9	41.8	47.1	35.9	36.9	33.0
Discard/recycle	17.9	24.1	28.0	14.9	14.4	11.8

Readership of other magazines

Readers were asked to indicate whether or not they subscribe to each magazine listed below and how many of the last four issues they've read.

Subscriptions to other magazines	Avg. # of last four issues read	2004	2003	2002	2001
PC Magazine	3.29	21.6%	22.3	22.5	19.2
Successful Meetings	2.85	21.2	19.1	20.6	15.0
Training	3.18	16.2	18.4	16.1	13.6
eWeek	2.78	15.9	21.7	15.2	12.1
Business Week	2.94	12.7	13.6	15.4	13.8
PC World	3.46	11.0	14.1	13.0	16.4
Fortune	2.78	10.3	10.2	10.3	9.0
Fast Company	2.97	9.9	13.1	14.7	15.5
AV Video	3.08	9.3	12.1	12.3	12.0
Sales & Marketing Mgmt	2.83	8.8	9.7	8.8	7.9
MacWorld	3.32	7.4	7.4	9.0	9.0
Inc.	2.76	7.3	8.0	7.3	5.6
Digital Video	3.33	7.1	9.4	8.4	9.0
Business 2.0	2.89	6.4	7.1	6.3	4.8
eMedia	2.98	6.3	6.6	6.8	6.8
Videography	3.29	6.1	5.7	7.0	6.7
Videomaker	3.61	4.5	5.5	6.1	6.6
Pro AV	3.55	4.5	4.7	3.3	4.6
Government Video	2.75	4.2	5.1	4.4	4.6
Sound & Video Contractor	3.43	4.2	2.8	3.6	-
Sound and Communications	3.32	4.2	-	-	-
Video Systems	3.43	3.8	4.4	4.2	4.9
Selling Power	3.00	3.3	3.2	4.8	4.3
Systems Contractor News	3.65	2.9	2.8	2.0	-
Digital Camera	3.35	2.5	3.9	3.5	2.9

It can be concluded that considering the minimal duplication of readership and the average number of the last four issues read amongst other magazines, the audience of *Presentations* can not effectively be reached through other publications.

Other information sources

Readers were asked to indicate additional resources they use to stay current on presentation technology and techniques.

	2004	2003	2002	2001	2000
Trade shows	43.7%	41.1	41.0	40.0	45.8
Local dealers/retailers	19.8	22.3	23.9	24.2	28.0
Magazines	64.2	70.8	65.5	62.9	68.4
Web sites	72.1	67.3	64.2	61.5	64.7
Seminars	28.9	34.7	28.7	28.9	31.9
e-Newsletters	44.1	50.7	39.1	37.6	31.7
Colleagues/peers	45.3	52.8	-	-	-
Other	1.1	1.9	4.2	4.2	4.3

Presentations.com

Readers were asked "How often do you visit Presentations.com?"

	2004	2003	2002	2001	2000
Daily	2.7%	0.5	0.2	0.1	0.2
Weekly	6.6	6.2	5.0	4.1	4.0
Monthly	54.8	50.6	46.3	36.4	30.1
Never visited	35.9	42.7	48.6	59.4	65.7