



National
Institute for
Commodity
Promotion
Research &
Evaluation

**May 1999
NICPRE 99-01
RB 99-03**

Commodity Promotion Programs in the United States

by

**Philip R. Vande Kamp and
Harry M. Kaiser**

Department of Agricultural, Resource, and Managerial Economics
College of Agriculture and Life Sciences
Cornell University, Ithaca, New York 14853

Abstract

An analysis of 102 survey responses from generic commodity promotion organizations was completed. Details regarding objectives, export promotion, funding sources, program evaluation, and the allocation of expenditures for promotion organizations were evaluated. We estimate that the organizations included in this analysis control 70 to 80 percent of the total generic commodity promotion expenditures in the U.S.

Since generic commodity promotion organizations play a significant roll in promoting and marketing many commodities, analyses of these organizations should continue to provide potential benchmarking and summarizing information so that they can operate efficiently and effectively.

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Commodity Promotion Programs in the United States

Generic commodity promotion programs have grown in importance over the past several decades and have matured from primarily state level programs before the mid-1980's to a mixture of state and national programs (Forker and Ward). Currently a significant number of both federally legislated as well as state and regional commodity promotion programs are in effect. Generic commodity promotion describes activities when a standard industry-wide commodity, such as cotton or beef, is promoted as opposed to particular brands or the production of specific producers.

Farmers, cooperatives, and processors organize generic commodity promotion programs in order to provide information and promote their commodity. To assure orderly operation of generic promotion programs, however, a legislative mandate is needed for the promotion organization to collect equitable levies from those who benefit from the promotion activities. Although the Agricultural Marketing Agreement Act of 1937 set the federal legislative foundation for generic promotion programs, only several national programs were organized under this legislation. In recent years, the growth in commodity promotion activities has come from stand-alone legislation, which has the advantage of conforming to a specific commodity or organization's needs (Forker and Ward 82). Most generic commodity promotion legislation is similar where referendums of producers, processors, and/or cooperatives are used to determine support for check-off funded promotion programs.

New generic commodity promotion programs are frequently being introduced, while some current programs fail to pass referendums and are subsequently discontinued. For example, in the Federal Agricultural Improvement and Reform Act of 1996, three additional commodity promotion programs were authorized including popcorn, canola and rapeseed, and kiwifruit (Wright). Other programs have recently been discontinued including the Fresh Cut Flowers and Fresh Cut Greens Promotion and Information Order, also known as PromoFlor. As a result of failure to pass a referendum, this program was ordered to discontinue in 1997 (Agricultural Marketing Service, U.S. Department of Agriculture).

Over the years, the increased use of commodity promotion programs has given rise to a specific area of economic research that concentrates on investigating and evaluating generic commodity promotion programs. As a result, the base of literature relating to generic commodity promotion is extensive and continues to rapidly grow. An excellent source of details on the history and economics of generic commodity promotion programs is Forker and Ward. Ferrero et al. provide an extensive review of commodity promotion research. Also a previous survey of U.S. Commodity promotion organizations which was performed in 1990, is summarized in Lenz, Forker, and Hurst.

Survey

In this study, U.S. generic commodity promotion organizations were surveyed to obtain information regarding their objectives, funding sources, export promotion priorities, program evaluation procedures, and allocation of promotion expenditures. Of the 220 surveys mailed in the summer of 1995, 67 were sent to state departments of agriculture, 51 were sent to state,

regional, and national dairy promotion organizations, and 102 were sent to other generic promotion organizations.

Surveys were sent to state departments of agriculture to obtain information on any state generic promotion programs that were administered by personnel at the state departments of agriculture. Since many state departments of agriculture are not involved in any promotion programs, many of these surveys were either not returned or returned without any useful information. Some state departments of agriculture, however, have oversight of promotion organizations, and in these cases, a completed survey was returned. For the dairy and other generic promotion organizations, some programs had been discontinued and were no longer in existence. Of the surveys sent, 102 useful surveys were returned. We estimate that the organizations that returned useful surveys control 70 to 80 percent of the total generic commodity promotion expenditures in the U.S. The actual survey, which was used in this study, is provided in the appendix.

The survey responses were divided into seven categories based on the commodities that they represented and promoted (Table 1). A majority of the respondents promote one or possibly two commodities that fall clearly into one of the commodity categories. Several responses from state departments of agriculture, however, described promotion programs for a group of local or state commodities. In these programs, states frequently are attempting to differentiate their products from those in other states. This group of responses was classified under State and Region-Specific Products.

Also the survey responses were segmented into categories based on their total budgets. These categories range from less than one-half million dollars to greater than twenty-five million dollars. Table 2 shows the number of responses by commodity category and by total budget. Some commodity categories including vegetables, fruits and nuts, fibers and other products, and state and region-specific products are heavily weighted toward smaller organizations in terms of total budget, whereas the other categories show more of a balance of small and large organizations.

The number of staff and the aggregate budget for each commodity category is provided in Table 3. This table shows that the expenditures for dairy promotion organizations are significantly larger than the aggregate budgets for any of the other six categories. On the other extreme, the aggregate budget for the category of state and regions-specific products is very small relative to the other categories.

Objectives of Promotion Organizations

The survey of promotion organizations attempted to elicit who determines the objectives in each organization and what information is used in this process. The balance of responsibility for setting objectives differs across promotion organizations. Table 4a displays how objectives are set across commodity categories. In most organizations, the objectives are set either by the producer board or by the staff in consultation with the producer board. These two answers make up 76 percent of all surveyed organizations. The “other” response frequently included board of directors or board of trustees and not a producer board of directors since some organizations promote processed or high-value commodities. The state and region-specific product

organizations are somewhat atypical since the organization's staff or legislature frequently sets objectives in this category. Table 4b, which presents the determination of objectives across budget sizes, shows that in higher budget organizations, objectives are more likely to be set by either the producer board or the staff in consultation with the producer board.

Tables 5a and 5b show the types of information that are used in determining objectives by commodity category and budget size respectively. For all organizations, economic information about the commodity sector is the most commonly used information in setting objectives. From Table 5a, some promotion organizations such as vegetables, dairy, and meat, poultry, seafood, and eggs are more likely to use consumer surveys in determining objectives than other commodity categories. Grains and oilseeds, and fibers and other products are less likely to use consumer surveys. Table 5b shows that use of the various types of information is in general larger for organizations with larger budgets. Specifically, the use of consumer surveys and economic analysis is greater for organizations with larger budgets; however, no clear correlation occurs between budget size and when objectives are set externally. Other information used in determining objectives included overseas staff, specific data, and consultants.

The two main objectives reported by promotion organizations included "increase total commodity sales" and "increase producer prices and net returns" (Table 6a). The objective, "change consumer beliefs about the commodity" is ranked high for dairy and meat, poultry, seafood and eggs commodity promotion organizations, which is likely related to consumer concerns about fat and cholesterol associated with these commodities groups. The objective, "reduce surplus stocks of the commodity," is highly ranked by only a few organizations. Other objectives included changing overseas consumer beliefs and practices, and providing information to food service operators. No correlation between organizations' budget levels and highly ranked objectives was apparent (Table 7b).

Funding of Promotion Programs

A variety of methods are used to fund commodity promotion programs. Many traditional promotion programs are funded by a levy or checkoff applied to farmers or first-handlers of a commodity. In programs supported by processors, processors may be required to pay a levy based on the quantity or value of the product that is processed. Some programs are state mandated while others are federally mandated. The levy can take the form of a per unit levy or a levy on the value of the commodity. For example, producer-supported fluid milk and dairy product promotion programs are funded by a levy of \$0.15 per hundred pounds of raw milk marketed, while producer-supported pork promotion programs are funded by a levy of 0.45 percent of market value when hogs or pigs are sold. Methods of funding promotion programs also include voluntary contributions and membership fees.

While most state-authorized programs do not allow refunds, federally authorized programs were required until 1983 to allow producers to obtain a refund of their assessment. In 1983, however, Congress passed a precedent-setting generic dairy promotion program, which did not allow refunds (Forker and Ward). In the following years, many federal generic commodity promotion programs followed this example. Very recently, however, the constitutionality of mandatory assessments for generic commodity promotion programs was tested in the case *Glickman v.*

Wileman Bros. and Elliott, Inc. In June of 1997, the U.S. Supreme Court upheld the constitutionality of mandatory assessments.

In our survey, the most common method of funding was state-mandated producer checkoffs followed closely by federally mandated producer checkoffs (Table 7). It is interesting to note that the dairy, and meat, poultry, seafood, and eggs commodity categories show more organizations obtaining funding via federally mandated checkoffs relative to state mandated checkoffs. The reverse is true for grains and oilseeds, and fruits and nuts where the number of organizations funded by state-mandated checkoffs is larger than the number of organizations funded by federally mandated checkoffs. With the exception of state and region-specific products, all commodity categories contain organizations that are supported by voluntary contributions. Other methods of funding included excise taxes and license fees.

Export Promotion

In many of the U.S. generic commodity promotion organizations, export promotion is a significant and growing area of importance. Table 8 shows that 54 percent of the organizations in the survey promote in export markets. With the exception of the dairy category, a significant percentage of the organizations in all of the commodity categories promoted in export markets. Only 7 percent of the organizations in the dairy category participated in export promotion. Also from Table 8, one can observe that firms with larger total budgets appear more likely to participate in export promotion. Not only do a large proportion of the organizations promote in export markets, but also 73 percent consider export promotion to be “very important” to their organization’s goals (Table 9). Also 65 percent expect the importance of export promotion to increase while 33 percent expect it to remain the same.

While domestic promotion programs are almost entirely funded by producers, processors, and cooperatives, export promotion programs are often partially funded by public sources. States frequently provide financial support for export promotion, and federal programs such as the Market Promotion Program (MPP) and the Foreign Market Development Program (FMD) provide significant funding to generic commodity promotion organizations for the purpose of export promotion.

For organizations in our survey that promote in export markets, an average of 41 percent of export promotion expenditures was funded by the MPP (Table 10). Utilization of the MPP was highest for the vegetables and dairy categories – all organizations in these categories that promoted exports used MPP funds. Organizations in other categories such as grains and oilseeds, fibers and other products, and state and region-specific products were less likely to use MPP funds. No clear correlation is apparent between the percentage of organizations that utilized MPP and the total budgets of the promotion organizations. Of the organizations in the total budget categories that utilized MPP funds (given by the percentage with nonzero responses), the average percentage of export promotion funded by MPP ranges from 45 to 63 percent (average percent/percent with nonzero responses), which is a significant percentage.

The proportion of export promotion expenditures provided by non-MPP sources is shown in Table 11. For all organizations that participated in export promotion, 39 percent obtained funds

from non-MPP sources. On average, 15 percent of export promotion was funded by non-MPP sources including state sources and funds from the Foreign Market Development program (FMD). Not surprisingly, all organizations in the state and region-specific products category obtained funds from non-MPP sources, most of which are likely state funds. Furthermore, an average of 70 percent of export promotion in this category is supported by non-MPP funds.

Table 12 shows that the elimination of the MPP or state funds would have a significant impact on export promotion in some organizations. Overall, 25 percent would stop engaging in export promotion, but 35 percent would invest the same amount of organizational funds if these funding sources were eliminated. From the responses by total budget in Table 12, promotion organizations with small budgets would be more likely to abandon export promotion than organizations with larger budgets if MPP or state export promotion funds were eliminated. The specific meaning of “organizational funds” – whether it includes MPP or state funds – was somewhat ambiguous in the survey; therefore the responses to changes in the “investment of organizational funds” should be interpreted cautiously.

Methods Used to Evaluate Objectives

Tables 13a through 13e present the methods used by organizations to evaluate their objectives in terms of export activities. These responses are from organizations that, of course are involved in export promotion, but also provided a ranking of the specific objective for which evaluation methods are selected. The right-hand column in each table shows the number of organizations that ranked this objective. For example, in Table 13a, 50 organizations ranked “increasing aggregate commodity sales” as an objective and 32 percent of these organizations stated that consumer surveys were used to evaluate this objective. Similarly, 54 percent stated that economic analysis was used to evaluate this objective. No indication is provided here of what number this objective was ranked, but the number of organizations that ranked this method and whether a method or no method was used to evaluate this objective can give an indication of importance of the objective. No correlations were found between commodity categories and methods used to evaluate objectives; therefore results by commodity category are not presented.

Increasing aggregate commodity sales was a highly ranked objective; therefore a large majority of the organizations evaluated this objective using a variety of methods (Table 13a). The most common methods for evaluating this objective included change in sales and economic analysis. The most common methods for evaluating the objective of maximizing producer prices and returns included change in farm price and economic analysis (Table 13b). The choice of methods used to evaluate the objectives of reducing surplus commodity stocks, changing consumer beliefs, and changing retailer attitudes in export activities are shown in Table 13c, Table 13d and Table 13e respectively. It is interesting to note that the objective of reducing surplus commodity stocks was ranked by only 36 organizations out of 55 that promote in export markets. Also, 28 percent of organizations that ranked this objective did not provide an evaluation method, which suggests that this is a low ranking objective. Not surprisingly, the most common method used to evaluate changing consumer beliefs is consumer surveys (Table 13d). In these results, no clear correlation emerges between organizations’ total budget levels and methods used to evaluate objectives.

Similar to the above tables that applied to export activities, Tables 14a through 14e present the choice of evaluation methods for objectives in domestic activities. The most frequently ranked objective was increasing aggregate commodity sales where 92 organizations included this objective in their ranking. Similar to above, change in sales was the most commonly used method for evaluating this objective. In Table 14a, the use of consumer surveys, economic analysis, and change in sales tend to be higher for organizations with larger budgets. This result, however, is not as apparent for these methods when they are used in evaluating other objectives. The remaining results obtained for domestic activities are similar to those results obtained for export activities.

Use of Internet or World Wide Web

The use of the Internet or World Wide Web by commodity category and total budget is shown in Table 15. Use of the Internet or World Wide Web is highest among organizations in the category of meat, poultry, seafood, and eggs, and lowest among organizations in the fruits and nuts category. The size of organizations is likely a factor in this result. The fruits and nuts category contains a high number of relatively small organizations while the organizations in the category of meat, poultry, seafood and eggs are relatively large. This result is even better illustrated in the lower part of Table 13 where use of the Internet or World Wide Web is presented by total budget. These results show that in general, small organizations are less likely to use the Internet or World Wide Web than larger ones.

Allocation of Promotion Expenditures

The budget allocations of promotion organizations are shown by commodity category and total budget in Table 16 and Table 17 respectively. Table 17 also provides a breakdown of expenditures for all organizations in this study. These tables provide a useful overview of the allocation of generic commodity promotion organizations' expenditures and as a result, are probably one of the most interesting results of this study.

Some organizations encountered difficulty in allocating their budgets across the alternatives in the survey and as a result, a complete allocation of each organization's budget was not provided in all cases. In the tables, several additional rows were added to account for unallocated promotion expenditures. A couple of organizations were not able to separate expenditures on television advertising and radio advertising; therefore, a row was added to include television and radio advertising not separated. Rows entitled unallocated domestic promotion and unallocated export promotion were included for organizations that provided total domestic and total export promotion expenditures but were not able to itemize these expenditures. Also a row was included for unallocated expenditures since several organizations did not itemize any expenditures and provided only their total budgets.

Some funds are transferred between promotion organizations, especially in the case of collaboration between state and national programs. As a result, aggregate budgets in the commodity categories would be overstated by simply summing the total budgets of each of the promotion organizations in a category. To avoid double counting, the funds transferred to other promotion organizations included in our survey responses were subtracted from the sum of total

budgets in each category. Although the survey did not ask to which organizations the contributions were provided, fortunately most organizations that contributed to other promotion organizations voluntarily provided this information in the comments sections of the survey. Ignoring this potential double counting would have overstated the aggregate budget for all promotion organizations in the survey by approximately 0.8 percent.

From Table 16, one can observe that the vegetables, dairy, and meat, poultry, seafood, and eggs (MPSE) categories had proportionally high domestic promotion expenditures while grains and oilseeds, and fibers and other products had proportionally high export promotion expenditures. The categories which emphasized domestic promotion, including vegetables, dairy, and MPSE, spent 25.3, 37.6 and 25.7 percent respectively of their total annual expenditures on television. Organizations in the fruits and nuts category, while spending a moderate percentage of total expenditures on television advertising, heavily utilized in-store promotions in domestic promotion activities. Promotion organizations in fibers and other categories expended by far the largest percentage of total budget on export promotion. In this case, most of the export promotion expenditures were spent on consumer advertising.

One can observe that the dairy and MPSE categories spent a large percentage of their total budgets on nutrition education relative to other commodity categories. Consumer concerns about fat and cholesterol in these commodity categories are likely the stimulus behind nutrition education programs. This result corresponds to the earlier result where the objective of “changing consumer beliefs about the commodity” was highly ranked by organizations in both of these categories.

The differing methods of promotion across the budget categories are clearly evident in Table 17. One can see that television advertising is larger as a percentage of total expenditures for organizations with larger budgets. Smaller organizations utilize alternative promotion methods such as nutrition education and public relations. Expenditures as a percentage of total budget for nutrition education and public relations is higher for small organizations compared to large organizations. In general, program administration is also higher as a percentage of total budget for small organizations compared to large organizations.

Overall, 50.6 percent of all included organizations’ budgets is spent on domestic promotion, and 23.6 percent is spent on television advertising, which is the largest of all the itemized categories. Export promotion consumes 14.9 percent of the total budget, and 7.1 percent is expended on program administration. Many additional details on the budget allocations for promotion organizations can be found in Table 16 and Table 17.

Evaluation of Promotion Programs

Evaluation of promotion activities is an important function in generic commodity promotion organizations. To maintain the confidence of levy-paying producers, processors, or cooperatives, promotion organizations need to demonstrate that their promotion activities are effective and worthwhile. Also, when export promotion activities are supported by public funds, promotion organizations must show that these funds are used in an effective manner. Recently, evaluation activities of promotion organizations were mandated in the Federal Agricultural

Improvement and Reform Act of 1996, which requires an independent evaluation of the effectiveness of each generic commodity promotion program, not less than every five years (Wright).

The average percentage of budget used for program evaluation by commodity category and by total budget is given in Table 18a and Table 18b respectively. From Table 18a, promotion organizations in the dairy, and fibers and other products categories were most likely to allocate expenditures to program evaluation. These two categories also reported the highest average percentage of total budget applied to program evaluation. No organizations in the state and region-specific commodity category allocated expenditures to program evaluation.

Table 18b shows that organizations with small budgets were less likely to allocate funds to program evaluation compared to larger organizations. No clear correlation existed, however, between average percentage of total budget allocated to program evaluation and total budget categories. For all organizations in the survey that provided itemized budgets, 32 percent allocated funds to program evaluation and the average allocation was 1.0 percent of total budget.

Summary and Conclusion

An analysis of 102 survey responses from generic commodity promotion organizations was completed. Details regarding objectives, export promotion, funding sources, program evaluation, and the allocation of expenditures for promotion organizations were evaluated. We estimate that the organizations included in this analysis control 70 to 80 percent of the total generic commodity promotion expenditures in the U.S.

Some of the key results of this analysis include:

- o Total budgets for all organizations in the analysis were \$695,335,312
- o Of all the commodity categories, the dairy category has by far the largest aggregate budget.
- o Two highest ranked objectives for promotion organizations were “increase total commodity sales” and “increase producer prices and net returns.”
- o The most common funding sources among the organizations in our survey were state and federally mandated producer checkoffs.
- o Large organizations in terms of total budget are more likely to promote in export markets than smaller organizations.
- o For all organizations, 41 percent of all export promotion expenditures was obtained from the Market Promotion Program.
- o For all organizations, 15 percent of all export promotion expenditures was provided by public sources other than MPP.

- o Organizations with smaller total budgets are less likely to utilize MPP funds than organizations with larger budgets.
- o Sixty percent of the organizations in the survey do not use the Internet or World Wide Web.
- o Vegetables, dairy and meat, poultry, seafood, and egg categories had proportionally high domestic promotion expenditures while grains and oilseeds, and fibers and other products had proportionally high export promotion expenditures.
- o Larger promotion organizations are more likely to utilize television advertising while smaller organizations are more likely to use nutrition education programs and public relations.
- o Program administration expenses are high as a percentage of total budget for small organizations compared to larger organizations.
- o For all organizations, 50.6 percent of total budget was allocated to domestic promotion while 14.9 percent was allocated to export promotion. Television advertising consumed 23.6 percent of the total budget for all organizations. Similarly, program administration expenses were 7.1 percent of the total budget, and program evaluation expenditures were 1.2 percent of the total budget.

Since generic commodity promotion organizations play a significant roll in promoting and marketing many commodities, analyses of these organizations should continue to provide potential benchmarking and summarizing information so that they can operate efficiently and effectively.

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Table 1. Commodity Category Classifications

Grains and Oilseeds

Barley
Corn
Soybeans
Sorghum
Wheat
Rice

Vegetables

Artichokes
Avocados
Edible Beans
Lentils
Onions
Peas
Potatoes
Tomatoes

Dairy

Fluid Milk
Manufactured Dairy Products

Meat, Poultry, Seafood, and Eggs

Animal Genetic Products
Beef and Beef Products
Eggs
Fowl
Lamb
Pork
Seafood
Turkey
Veal

Fruits and Nuts

Almonds
Apples
Canola
Cherries
Figs
Flax
Grapes (fresh and wine)
Hazelnuts
Kiwifruit
Nectarines
Nuts
Peaches
Peanuts
Pears
Plums
Prunes
Raisins
Safflower
Sunflower seed and oil
Watermelon
Wines

Fibers and Other Products

Cotton (raw and value added products)
Cut Ferns
High Value Consumer Goods
Honey
Hops
Mohair
Seed and Plant Genetics

State and Region-Specific Products

Products promoted by state departments of agriculture, which frequently include a broad range of raw and manufactured agricultural products produced in a state.

Table 2. Number of Respondents by Commodity Category and Budget Size

Commodity Category	Total Budget (Million Dollars)						Total
	<0.5	0.5- 0.99	1.00- 4.99	5.00- 9.99	10.00- 24.99	>=25.0	
Grains and Oilseeds	0	3	3	0	2	1	9
Vegetables	6	0	2	1	1	0	10
Dairy	4	3	11	3	4	3	28
Meat, Poultry, Seafood, and Eggs	2	0	4	0	3	3	12
Fruits and Nuts	10	2	8	5	2	1	28
Fibers and Other Products	2	2	2	0	1	0	7
State and Region Specific	3	2	3	0	0	0	8
Total	27	12	33	9	13	8	102

Table 3. Survey Respondents, Number of Staff, and Aggregate Budgets

Commodity Category	Number of Respondents	Number of Staff	Aggregate Budgets (\$)
Grains and Oilseeds	9	215.5	85,391,070
Vegetables	10	50.5	25,729,558
Dairy	28	328	271,374,430
Meat, Poultry, Seafood, and Eggs	12	155 *	179,259,457
Fruits and Nuts	28	279	104,520,297
Fibers and Other Products	7	50.5	21,046,000
State and Region Specific	8	100.5	8,014,500
Total	102	1,179	695,335,312

* Number of staff for one respondent with an aggregate budget between 10 and 25 million dollars was not available

Table 4a. Determination of Objectives by Commodity Category

Commodity Category	Objectives are set by (percent of respondents): *				
	Organization's Staff	Producer Board	Staff in Consultation with Producer Board	Legislature	Other
Grains and Oilseeds	0	33	44	11	11
Vegetables	0	40	60	0	0
Dairy	11	11	64	4	11
Meat, Poultry, Seafood, and Eggs	0	55	36	0	9
Fruits and Nuts	4	29	50	7	11
Fibers and Other Products	14	29	29	0	29
State and Region Specific	38	0	38	25	0
All Groups	8	26	50	6	10

* Based on 101 responses

Table 4b. Determination of Objectives by Budget Size

Total Budget (Million Dollars)	Objectives are set by (percent of respondents): *				
	Organization's Staff	Producer Board	Staff in Consultation with Producer Board	Legislature	Other
< 0.5	11	48	37	4	0
0.5 - 0.99	8	25	33	17	17
1.0 - 4.99	9	12	64	6	9
5.0 - 9.99	0	0	67	11	22
10.0 - 24.99	8	17	58	0	17
>= 25.0	0	50	38	0	13
All Budgets	8	26	50	6	10

* Based on 101 responses

Table 5a. Types of Information Used in Determining Objectives by Commodity Category

Commodity Category	Percent of Respondents that Chose the Following Types of Information *					
	Economic Info. About Commodity Sector	Consumer Surveys	Economic Analysis	Objectives Set Externally	Projected Growth in Commodity Production	Other
Grains and Oilseeds	78	22	67	22	56	33
Vegetables	80	70	40	20	60	0
Dairy	64	68	50	4	39	14
Meat, Poultry, Seafood, and Eggs	82	73	64	9	55	18
Fruits and Nuts	75	57	39	11	61	14
Fibers and Other Products	57	0	14	14	0	0
State and Region Specific	50	50	50	25	63	25
All Groups	70	55	47	12	50	15

* Based on 101 responses

Table 5b. Types of Information Used in Determining Objectives by Budget Size

Total Budget (Million Dollars)	Percent of Respondents that Chose the Following Types of Information *					
	Economic Info. About Commodity Sector	Consumer Surveys	Economic Analysis	Objectives Set Externally	Projected Growth in Commodity Production	Other
< 0.5	63	37	19	11	59	19
0.5 - 0.99	67	33	42	17	58	8
1.0 - 4.99	70	61	52	9	33	18
5.0 - 9.99	78	67	56	33	67	0
10.0 - 24.99	83	75	83	8	42	25
>= 25.0	75	88	63	0	63	0
All Budgets	70	55	47	12	50	15

* Based on 101 responses

Table 6a. Organization Objectives by Commodity Category

Percent of Organizations that Ranked the Following Objectives 1 or 2 *						
Commodity Category	Increase Total Commodity Sales	Increase Producer Prices and Net Returns	Reduce Surplus Stocks of Commodity	Change Consumer Beliefs about Commodity	Change Retail Attitudes about Commodity	Other
Grains and Oilseeds	100	100	0	0	0	0
Vegetables	70	70	0	50	10	0
Dairy	96	36	4	61	7	4
Meat, Poultry, Seafood, and Eggs	55	45	0	64	0	36
Fruits and Nuts	79	71	11	21	14	4
Fibers and Other Products	71	14	0	29	29	29
State and Region Specific	88	75	0	13	25	0
All Groups	82	57	4	38	11	8

* Based on 101 responses

Table 6b. Organization Objectives by Budget Size

Percent of Organizations that Ranked the Following Objectives 1 or 2 *						
Total Budget (Million Dollars)	Increase Total Commodity Sales	Increase Producer Prices and Net Returns	Reduce Surplus Stocks of Commodity	Change Consumer Beliefs about Commodity	Change Retail Attitudes about Commodity	Other
< 0.5	85	56	4	44	15	0
0.5 - 0.99	92	50	0	50	8	0
1.0 - 4.99	82	73	3	27	9	6
5.0 - 9.99	89	56	11	33	11	0
10.0 - 24.99	92	33	8	33	8	17
>= 25.0	38	50	0	50	13	50
All Groups	82	57	4	38	11	8

* Based on 101 responses

Table 7. Number of Organizations by Method of Funding and Commodity Category

Commodity Category	Method of Funding					Total
	Federally Mandated *	State Mandated *	Processor Checkoff	Voluntary Contributions	Other	
Grains and Oilseeds	2	5	1	2	0	10
Vegetables	2	3	2	5	0	12
Dairy	21	12	4	3	1	41
Meat, Poultry, Seafood, and Eggs	8	4	0	2	6	20
Fruits and Nuts	5	15	5	6	5	36
Fibers and Other Products	1	2	0	2	3	8
State and Region Specific	0	1	0	0	7	8
Total	39	42	12	20	22	135 **

** Since some respondents had more than one funding source, the total is greater than the number of respondents.

* Producer Checkoffs

Table 8. Organizations that Promote in Export Markets

By Commodity Category						
Grains and Oilseeds	Vegetables	Dairy	Meat, Poultry Seafood, and Eggs	Fruits and Nuts	Fibers and Other Products	State and Region Specific
(percent of respondents)						
78%	50%	7%	67%	71%	86%	88%
By Total Budget (Million Dollars)						
< 0.5	0.5- 0.99	1.00 - 4.99	5.00 - 9.99	10.00 - 24.99	>= 25.0	All Respondents
(percent of respondents)						
41%	42%	64%	56%	62%	63%	54%

Table 9. Importance of Export Promotion *

How Important is Export Promotoin to Your Organization's Goals?				
Very Important	Somewhat Important	Neither Important nor Unimportant	Somewhat Important	Unimportant
(percent of respondents)				
73%	17%	10%	0%	0%
Relative to Domestic Promotion, Is the Importance of Export Promotoin Likely to:				
Increase?	Stay the Same?		Decrease?	
(percent of respondents)				
65%	33%		2%	

* Based on 52 responses out of 55 organizations that promote in export markets

Table 10. Proportion of Export Promotion Investment From the Market Promotion Program (MPP) *

By Commodity Category						
Grains and Oilseeds	Vegetables	Dairy	Meat, Poultry Seafood, and Eggs	Fruits and Nuts	Fibers and Other Products	State and Region Specific
(average percent)						
23%	44%	64%	54%	47%	35%	21%
(percent with nonzero responses)						
57%	100%	100%	75%	80%	50%	57%
By Total Budget (Million Dollars)						
< 0.5	0.5- 0.99	1.00 - 4.99	5.00 - 9.99	10.00 - 24.99	>= 25.0	All Respondents
(average percent)						
33%	20%	42%	55%	55%	36%	41%
(percent with nonzero responses)						
64%	40%	67%	100%	100%	80%	73%

* Based on all 55 responses of organizations who promoted in export markets

Table 11. Proportion of Total Export Promotion Investment From Public Sources Other than MPP
(e.g. State Funds) *

By Commodity Category						
Grains and Oilseeds	Vegetables	Dairy	Meat, Poultry Seafood, and Eggs	Fruits and Nuts	Fibers and Other Products	State and Region Specific
(average percent)						
32%	5%	5%	4%	5%	9%	70%
(percent with nonzero responses)						
50%	40%	50%	29%	15%	67%	100%
By Total Budget (Million Dollars)						
< 0.5	0.5- 0.99	1.00 - 4.99	5.00 - 9.99	10.00 - 24.99	>= 25.0	All Respondents
(average percent)						
17%	13%	19%	0%	8%	16%	15%
(percent with nonzero responses)						
45%	50%	42%	0%	43%	40%	39%

* Based on 51 responses out of 55 organizations that promoted in export markets

Table 12. Impact of the Elimination of MPP or State Funds on Export Promotion *

Commodity Category	Stop Engaging in Export Promotion	Percent of Respondents that Chose:		
		Same Investment of Organizational Funds	Increased Investment of Organizational Funds	Decreased Investment of Organizational Funds
Grains and Oilseeds	14	71	0	14
Vegetables	0	60	0	40
Dairy	0	0	100	0
Meat, Poultry, Seafood, and Eggs	20	40	0	40
Fruits and Nuts	26	32	21	21
Fibers and Other Products	17	17	33	33
State and Region Specific	71	14	14	0
Total Budget (Million Dollars)				
< 0.5	50	20	10	20
0.5 - 0.99	0	60	40	0
1.0 - 4.99	35	25	15	25
5.0 - 9.99	0	60	0	40
10.0 - 24.99	14	43	14	29
>= 25.0	0	50	50	0
All Budgets	25	35	18	22

* Based on 51 responses out of 55 organizations that promote in export markets

Table 13a. Methods Used to Evaluate the Objective of *Increasing Aggregate Commodity Sales* in Export Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	27	45	82	55	0	9	11
0.5 - 0.99	60	80	80	40	0	0	5
1.0 - 4.99	21	47	74	16	5	5	19
5.0 - 9.99	40	20	100	20	0	0	5
10.0 - 24.99	33	67	100	0	0	0	6
>= 25.0	50	100	100	25	0	0	4
All Budgets	32	54	84	26	2	4	50

Table 13b. Methods Used to Evaluate the Objective of *Maximizing Producer Prices and Returns* in Export Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	18	45	73	64	9	18	11
0.5 - 0.99	25	75	50	75	0	0	4
1.0 - 4.99	20	55	40	50	0	10	20
5.0 - 9.99	40	80	60	80	0	0	5
10.0 - 24.99	0	17	0	17	17	50	6
>= 25.0	20	60	80	40	0	20	5
All Budgets	20	53	49	53	4	16	51

Table 13c. Methods Used to Evaluate the Objective of *Reducing Surplus Commodity Stocks* in Export Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	13	38	88	25	0	13	8
0.5 - 0.99	33	0	0	33	0	33	3
1.0 - 4.99	8	58	50	17	8	17	12
5.0 - 9.99	0	0	50	25	0	50	4
10.0 - 24.99	0	20	40	0	0	60	5
>= 25.0	0	50	75	25	0	25	4
All Budgets	8	36	56	19	3	28	36

Table 13d. Methods Used to Evaluate the Objective of *Changing Consumer Beliefs* in Export Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	44	33	56	11	11	22	9
0.5 - 0.99	80	40	60	20	0	20	5
1.0 - 4.99	59	24	41	0	0	18	17
5.0 - 9.99	100	0	50	0	0	0	4
10.0 - 24.99	100	0	50	0	0	0	4
>= 25.0	100	20	60	20	0	0	5
All Budgets	70	23	50	7	2	14	44

Table 13e. Methods Used to Evaluate the Objective of *Changing Retailer Attitudes* in Export Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	25	38	75	13	25	13	8
0.5 - 0.99	75	50	75	25	0	25	4
1.0 - 4.99	33	20	40	7	7	20	15
5.0 - 9.99	25	25	75	0	25	25	4
10.0 - 24.99	50	0	50	0	50	0	4
>= 25.0	100	40	60	20	0	0	5
All Budgets	45	28	58	10	15	15	40

Table 14a. Methods Used to Evaluate the Objective of *Increasing Aggregate Commodity Sales* in Domestic Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	31	35	58	38	0	15	26
0.5 - 0.99	58	58	67	33	0	8	12
1.0 - 4.99	47	40	77	33	7	7	30
5.0 - 9.99	63	25	88	25	0	0	8
10.0 - 24.99	67	33	78	0	0	22	9
>= 25.0	57	86	100	14	0	0	7
All Budgets	48	42	73	29	2	10	92

Table 14b. Methods Used to Evaluate the Objective of *Maximizing Producer Prices and Returns* in Domestic Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	24	32	48	68	4	20	25
0.5 - 0.99	22	67	44	56	0	11	9
1.0 - 4.99	25	46	50	64	0	14	28
5.0 - 9.99	43	57	86	71	0	0	7
10.0 - 24.99	0	43	29	29	14	43	7
>= 25.0	14	86	86	43	14	0	7
All Budgets	23	48	53	60	4	16	83

Table 14c. Methods Used to Evaluate the Objective of *Reducing Surplus Commodity Stocks* in Domestic Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	6	25	50	13	0	38	16
0.5 - 0.99	17	17	17	33	0	50	6
1.0 - 4.99	22	56	67	33	6	11	18
5.0 - 9.99	14	29	57	29	0	43	7
10.0 - 24.99	0	40	40	0	0	40	5
>= 25.0	0	67	83	17	0	0	6
All Budgets	12	40	55	22	2	28	58

Table 14d. Methods Used to Evaluate the Objective of *Changing Consumer Beliefs* in Domestic Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	62	29	57	10	5	10	21
0.5 - 0.99	91	36	55	9	9	0	11
1.0 - 4.99	76	31	45	7	3	7	29
5.0 - 9.99	100	14	71	0	0	0	7
10.0 - 24.99	88	13	50	0	0	13	8
>= 25.0	100	38	63	13	0	0	8
All Budgets	80	29	54	7	4	6	84

Table 14e. Methods Used to Evaluate the Objective of *Changing Retailer Attitudes*
in Domestic Activities

Total Budget (Million Dollars)	Percent of Respondents that Chose:						Number of Organiza- tions
	Consumer Surveys	Economic Analysis	Change in Sales	Change in Farm Price	Other	No Method Selected	
< 0.5	39	17	72	17	17	11	18
0.5 - 0.99	71	43	57	14	0	14	7
1.0 - 4.99	50	29	58	8	13	8	24
5.0 - 9.99	29	14	43	0	14	29	7
10.0 - 24.99	25	13	38	0	50	25	8
>= 25.0	88	50	63	13	0	13	8
All Budgets	49	26	58	10	15	14	72

Table 15. Use of the Internet or World Wide Web

Commodity Category	Provide Information Network for Members	Facilitate Activities	Make Information Available to Researchers and Others	Maintain a Home Page	Send and Receive E-mail	Other	Internet or WWW Not Used
(percent of organizations) *							
Grains and Oilseeds	22	22	22	11	44	0	56
Vegetables	0	11	22	0	33	0	56
Dairy	5	9	0	5	9	14	64
Meat, Poultry, Seafood, and Eggs	33	11	33	33	56	22	33
Fruits and Nuts	5	5	10	5	15	10	75
Fibers and Other Products	14	14	0	0	29	0	71
State and Region Specific	43	29	14	14	29	0	43
Total Budget (Million \$)							
< 0.5	4	0	4	0	13	4	78
0.5 - 0.99	30	20	10	10	20	0	70
1.0 - 4.99	4	20	8	4	28	8	52
5.0 - 9.99	13	13	13	13	25	0	75
10.0 - 24.99	17	8	17	8	33	25	33
>= 25.0	60	20	60	60	60	20	40
All Budgets	13	12	12	8	25	8	60

* 83 organizations responded to this question

Table 16. Budget Allocation of Promotion Organizations by Commodity Category

Budget Item	Commodity Category						
	Grains & Oilseeds	Veget- ables	Dairy	M, P, S, & E *	Fruit & Nuts	Fibers & Other	State & Region
(Percent of Total Budget)							
Domestic Promotion	5.2	51.8	70.1	54.0	43.1	1.7	25.4
Television Advertising	0.0	25.3	37.6	25.7	8.9	0.1	1.1
Radio Advertising	0.1	0.0	3.2	0.0	2.0	0.1	3.7
Television & Radio Not Separated	0.0	0.0	0.0	4.3	3.8	0.0	0.0
Print Advertising	0.1	7.4	17.6	8.6	1.4	0.5	6.3
Outdoor Advertising	0.0	0.0	1.6	0.0	0.3	0.0	0.0
Trade Advertising	0.2	9.9	4.6	1.7	6.5	0.2	1.1
In-store Promotions	0.0	2.1	4.7	9.1	14.0	0.6	8.2
Coupons	0.0	0.0	0.1	0.4	0.2	0.0	0.0
Contests	0.0	0.1	0.2	0.7	0.7	0.0	0.0
Unallocated Domestic Promotion	4.7	6.9	0.3	3.4	5.4	0.3	5.1
Export Promotion	36.0	17.5	0.7	16.0	21.0	70.0	14.2
Consumer Advertising	0.5	0.1	0.2	0.8	8.1	50.5	1.1
Technical Assistance	16.1	4.1	0.1	2.0	2.5	11.1	3.2
Trade Servicing	8.1	10.2	0.3	3.1	8.1	6.2	8.0
Unallocated Export Promotion	11.3	3.3	0.0	10.2	2.3	2.2	1.9
Nutrition Education	0.0	1.8	7.2	5.6	1.0	0.0	0.0
Health Research	0.0	0.1	1.8	1.4	0.5	0.0	0.0
Product Research	6.8	1.3	3.7	3.9	2.4	0.5	0.0
Public Relations	0.4	8.4	3.7	7.8	5.9	2.2	5.6
Program Evaluation	0.6	0.9	1.9	0.6	0.7	2.8	0.0
Contributions to Other Organizations **	21.0	0.3	0.1	0.0	1.3	0.4	0.0
Program Administration	13.1	7.1	6.9	3.4	7.4	16.6	2.9
Other	15.0	10.8	3.0	7.4	9.6	5.8	33.0
Unallocated Expenditures	1.9	0.0	0.8	0.0	7.4	0.0	18.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total Budget (Thousand \$)	85,391	25,730	271,374	179,259	104,520	21,046	8,015

Note that due to rounding, percentages may not sum to 100.

* Meat, Poultry, Seafood, and Eggs

** Only includes contributions to non-surveyed organizations to avoid double counting.

Table 17. Budget Allocation of Promotion Organizations by Budget Size

Budget Item	Total Budget (Million Dollars)						All
	<0.5	0.5 - 0.99	1.00 - 4.99	5.00 - 9.99	10.00 - 24.99	>= 25.0	
	(Percent of Total Budget)						
Domestic Promotion	30.2	19.8	25.6	50.8	44.1	59.0	50.6
Television Advertising	5.5	4.4	6.2	26.3	20.3	28.5	23.6
Radio Advertising	5.2	2.3	4.3	2.8	2.3	0.5	1.6
Television & Radio Not Separated	0.0	0.0	0.0	0.0	6.2	0.0	1.7
Print Advertising	1.7	2.1	2.1	2.7	2.1	16.3	9.7
Outdoor Advertising	1.3	0.1	0.7	1.4	0.7	0.5	0.7
Trade Advertising	2.0	2.3	0.8	6.3	1.1	5.0	3.6
In-store Promotions	5.1	3.6	3.5	11.1	6.3	6.4	6.5
Coupons	0.0	0.0	0.2	0.3	0.0	0.2	0.1
Contests	0.9	1.7	0.5	0.0	0.2	0.5	0.4
Unallocated Domestic Promotion	8.5	3.3	7.3	0.0	4.9	1.1	2.7
Export Promotion	5.5	11.4	18.1	14.1	29.3	7.0	14.9
Consumer Advertising	0.4	2.8	5.5	2.0	4.5	2.1	3.1
Technical Assistance	0.8	0.9	2.9	2.9	8.8	1.0	3.4
Trade Servicing	4.4	2.8	6.7	9.3	5.7	1.3	3.8
Unallocated Export Promotion	0.0	4.9	3.0	0.0	10.4	2.6	4.6
Nutrition Education	10.7	6.7	14.5	5.4	2.7	3.1	4.5
Health Research	2.6	0.0	1.0	0.8	0.4	1.6	1.1
Product Research	3.4	5.6	3.6	1.1	0.2	5.8	3.7
Public Relations	12.7	8.1	5.6	4.5	1.8	6.0	4.8
Program Evaluation	0.4	0.4	1.4	0.4	0.5	1.6	1.2
Contributions to Other Organizations ***	3.7	9.9	4.9	2.4	0.4	5.1	2.8*
Program Administration	12.8	12.8	10.7	5.1	9.3	5.2	7.1
Other	6.0	16.1	7.5	4.4	11.3	5.4	7.3
Unallocated Expenditures	11.8	9.2	7.2	10.9	0.0	0.0	1.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total Budget (Thousand \$)	5,550	9,244	70,344	59,841	188,203	367,911	695,335**

Note that due to rounding, percentages may not sum to 100.

* Only includes contributions to non-surveyed organizations to avoid double counting.

** Since some organizations contribute to other organizations in different budget categories the total budget for all organizations is less than the sum of the total budgets over budget categories.

*** May include contributions to organizations in other budget categories.

Table 18a. Average Percent of Budget Used for Program Evaluation by Commodity Category *

Commodity Category						
Grains and Oilseeds	Vegetables	Dairy	Meat, Poultry Seafood, and Eggs	Fruits and Nuts	Fibers and Other Products	State and Region Specific
(average percent **)						
0.2%	1.1%	1.3%	0.2%	0.9%	3.4%	0.0%
(percent with nonzero responses)						
25%	30%	42%	25%	31%	43%	0%
(number of organizations that provided itemized budgets)						
8	10	26	12	26	7	5

* For organizations that provided itemized budgets

** Simple averages across organizations in the commodity category

Table 18b. Average Percent of Budget Used for Program Evaluation by Total Budget *

Total Budget (Million Dollars)						All Respondents
< 0.5	0.5- 0.99	1.00 - 4.99	5.00 - 9.99	10.00 - 24.99	>= 25.0	
(average percent **)						
0.8%	0.5%	1.8%	0.5%	0.5%	1.3%	1.0%
(percent with nonzero responses)						
8%	18%	35%	50%	39%	88%	32%
(number of organizations that provided itemized budgets)						
25	11	29	8	13	8	94

* For organizations that provided itemized budgets

** Simple averages across organizations in the budget group