

Global Advertising Specialties Impressions Study

**A cost analysis of promotional products
versus other advertising media**

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Study Background

During July and August of 2010, a team conducted in-person interviews with businesspeople in New York, Chicago, Los Angeles, Philadelphia, London, Sydney, Toronto and Montreal metro areas on behalf of ASI regarding promotional products they had received. The purpose of the interviews was to understand where items are kept, frequency of use, why the promotional product was kept and estimate the number of impressions the advertiser makes with the item. In-person interviewers conducted a total of 406 completed surveys.

Further, an online panel survey was conducted among recipients of advertising specialties to augment the sample from the in-person interviews. Combined with the in-person interviews, there was a total of 3,332 completed surveys for this study. Respondents were asked if they had received any promotional products in the last 12 months.

Conclusions

- **Cost per Impression.** In the U.S., the cost per impression of a promotional product stayed virtually the same from 2008 to 2010, at .005 cents.
 - When compared to other forms of media like television or radio, promotional products are very affordable and effective. For a modest investment, a small company can obtain the type of exposure normally reserved for large companies with significant advertising budgets.
- **Product Usage.** Bags have the highest number of impressions in a month, over 1,000. In fact, over one-third (36%) of those with incomes under \$50,000 own bags.
 - Current global awareness of the importance of reusing, rather than throwing away, combined with high end-user needs for cost saving, make bags a better-than-ever way for advertisers to spread their message.
- **Gender Preferences.** Males are more likely than females to own shirts and caps, while females are more likely to have bags, writing instruments, calendars and health and safety products than males. And as men age, they are even more likely to have received a cap in the last 12 months. As women age, they are more likely to have received writing instruments or calendars.
 - Knowing the likely recipient of a promotional product is paramount for an advertiser. Decorating items that have special appeal to the end-user will mean the item gets used more often and held longer, extending the product's life span and increasing the number of impressions it makes.
- **Ethnic Preferences.** African Americans are more inclined to have received and kept caps/headwear and bags than any other ethnicity reported in the study, as nearly one-third (32%) reported having a cap and 37% a bag. They also have more promotional products on average (11.3) than any other group. More than eight out of 10 Hispanics reported having a writing instrument, the highest of any ethnicity in the study.
 - Identifying product preferences among ethnicities can increase the ROI of a promotional campaign.
- **Positive Reinforcement.** Product preferences differ among voters. 75% of Independent voters prefer consumer-branded products – nearly 1.5 times more than Democrats or Republicans. Independents get more promotional T-shirts than either Democrats or Republicans, but are less inclined than Democrats or Republicans to take free pens.
 - Promotional products are unique during political campaigns in that they primarily emphasize the positive qualities of a candidate, while mass media focuses more on the negative aspects of the opposing candidate. A positive message on a useful product stands above the fray of negative campaign ads.
- **Ability to Identify the Advertiser.** 83% in the U.S. indicated they could identify the advertiser on a promotional item they owned, very similar to 2008 (84%).
 - Not only do promotional products make impressions to everyone who sees them, but messaging is reinforced every time the item is used, as it is making a contribution to the needs of the owner. No other form of media can allow the advertiser to so closely tie a benefit to the recipient of the message or brand.
- **Ability to Influence User Opinions.** 41% of U.S. respondents indicated their opinion of the advertiser was more favorable after receiving a promotional product. Nearly one-half (47%) of Canadian respondents had a

more favorable impression. Among those who had not done business with the advertiser already in the U.S., 27% thought it likely they would. In Canada, this was 10 percentage points higher at 37%.

- Because the promotional products benefit is so clear to the end-user, they are more aware of the sponsor on the product and they are able to create a positive impression of the sponsor, as they find value in the item each time it is used.

- **Most Popular Products Across the Globe.** Nearly two-thirds (63%) of respondents from Great Britain have received and kept a pen in the last 12 months. In the U.S., writing instruments are used the most often, an average of 18.2 times per month. In Canada, caps are worn 5.8 times per month, the most of any country. Further, Canadians and Australians are more likely than respondents from any other country to have caps, 22% and 24%, respectively.

- Geographical and cultural differences can be addressed and exploited by promotional products so that the more effective products can be used in the most efficient manner.

- **Pass Along.** After receiving a promotional product they don't plan to keep, nearly two-thirds (62%) of respondents in the U.S. indicated that they give the item to someone else. This is up 11 percentage points from two years ago.

- Promotional product usefulness goes beyond the person who initially receives the item. Products are frequently passed along to others who might value them more.

Detailed Findings

Types of items owned

- The most commonly owned promotional products among U.S. respondents are writing instruments (46%), followed by shirts (38%) and calendars (24%). Calendars climbed from seventh in 2008 to third in 2010. The number of calendars given out was not necessarily higher, but the number kept and subsequently used was higher.
- Canadians and Australians are more likely than respondents from any other country to have caps, 22% and 24%, respectively.
- Nearly two-thirds (63%) of those from Great Britain have received and kept a pen in the last 12 months.
- Over one-quarter (29%) of Australians have received a calendar in the past 12 months.

Types of Items Owned (by Country)

	Rank 2010 (U.S.)	Rank 2008 (U.S.)	U.S.	Canada	Great Britain	Australia
Writing Instruments	1	1	46%	44%	63%	74%
Shirts	2	2	38%	42%	27%	24%
Calendars	3	7	24%	20%	24%	29%
Bags	4	4	23%	20%	20%	17%
Caps/Headwear	5	3	16%	22%	4%	24%
Desk/Office/Business Accessories	6	6	16%	18%	20%	22%
Food Items	7	n/a	12%	16%	15%	8%
Glassware/Ceramics (includes Mugs)	8	5	11%	18%	15%	17%
Health and Safety Products	9	n/a	9%	13%	6%	10%
Jackets/Hoodies/Sweatshirts/ Fleece	10	n/a	4%	8%	5%	7%
Electronics/Computer	11	n/a	4%	2%	8%	2%
Recognition-Awards/Trophies/ Plaques	12	10	3%	3%	3%	1%
Automotive	13	n/a	2%	1%	1%	0%

Average number of times used per month

- Writing instruments are used the most often, 18.2 times per month in the U.S.
- In Canada, caps are worn 5.8 times per month, the most of any country.

Average Number of Times Item Is Used per Month

	U.S.	Canada	Great Britain	Australia
Writing Instruments	18.2	18.2	19.0	17.6
Automotive*	7.8	n/a	n/a	n/a
Electronics/Computer*	7.7	n/a	n/a	n/a
Desk/Office/Business Accessories	7.2	6.7	7.2	7.2
Glassware/Ceramics (includes Mugs)	6.3	6.7	6.7	13.9
Bags	5.8	5.4	4.7	3.4
Health and Safety Products	5.6	6.2	n/a	n/a
Caps/Headwear	3.9	5.8	2.3	5.3
Shirts	3.1	3.1	2.8	3.7
Jackets/Hoodies/Sweatshirts/Fleece	2.7	7.0	7.5	5.1

*Results should be analyzed with caution due to low base size.

Average Number of Times Item Is Used per Month

	U.S.	Canada	Great Britain	Australia
Writing Instruments	18.2	18.2	19.0	17.6

FAST FACT:
 Writing instruments are the most-frequently used promo product for all countries that took part in the study.

Average number of contacts per month

- Bags have the highest average number of contacts when used each month, particularly in the U.S., where 187 see the item when used.
- Shirts also have a high number of contacts, with 113 in the U.S. and over 140 in Canada and Great Britain.
- Caps have a high number of contacts, particularly in Canada, where 173 see the item when it is used.

Average Number of Contacts per Month

	U.S.	Canada	Great Britain	Australia
Bags	186.9	127.0	111.4	41.6
Shirts	112.5	143.4	140.3	106.6
Caps/Headwear	112.1	173.4	129.2	156.5
Jackets/Hoodies/Sweatshirts/Fleece	84.8	82.9	72.3	63.4
Electronics/Computer*	36.1	n/a	n/a	n/a
Desk/Office/Business Accessories	33.3	33.2	36.9	66.2
Recognition-Awards/Trophies/Plaques	24.8	n/a	n/a	n/a
Writing Instruments	24.0	38.1	24.1	13.0
Glassware/Ceramics (includes Mugs)	16.4	16.3	12.2	5.5
Calendars	15.9	15.7	18.8	12.2
Health and Safety Products	15.4	15.2	n/a	n/a
Automotive*	7.3	n/a	n/a	n/a
Food Items	1.8	2.6	3.0	2.2

*Results should be analyzed with caution due to low base size.

Do you have the item displayed? (Asked to those who had recognition-awards and calendars)

- Results from year to year are fairly consistent, with awards being displayed about two-thirds (64%) of the time, and calendars three-quarters (76%) of the time.

Is Item Displayed? (U.S. Only)

	2010 Recognition-Awards*	2008 Recognition-Awards	2010 Calendars	2008 Calendars
Yes	64%	75%	76%	80%
No	36%	25%	24%	20%

*Results should be analyzed with caution due to low base size.

Impressions

U.S.

Impressions are calculated by multiplying the number of times an item is used by the number of people that see the item.

- Overall, the number of impressions for like items in 2008 and 2010 is similar. Once again, bags have the highest number of impressions per month, with 1,078.
- Wearables (shirts, caps, jackets) as a group generate the highest number of impressions.
- Items commonly used by only one person, such a health product (86 impressions/month) or food item (93 impressions/month), generate the lowest number of impressions.

Length of time item is kept

- The average length of time a respondent kept a promotional product is 5.4 months.
- Electronics are held the longest, at 8.1 months, while (as expected) food items are held for one month.

Total Impressions and Time an Item Is Kept – U.S.

	2010 Impressions/ Month	2008 Impressions/ Month	2010 Months Kept	2008 Months Kept
Bags	1,078	1038	6.7	8.6
Caps/Headwear	443	476	6.7	7.1
Writing Instruments	437	363	4.6	4.9
Shirts	344	365	6.4	6.8
Calendars	295	227	6.7	8.3
Electronics/Computer*	278	n/a	8.1	n/a
Automotive*	265	n/a	4.6	n/a
Jackets/Hoodies/Sweatshirts/Fleece	257	n/a	3.9	n/a
Desk/Office/Business Accessories	243	294	5.5	6.4
Recognition-Awards/Trophies/Plaques*	223	221	7.3	10.8
Glassware/Ceramics (includes Mugs)	198	251	6.6	8.0
Food Items	93	n/a	1.0	n/a
Health and Safety Products	86	n/a	4.1	n/a
AVG			5.4	5.9**

*Results should be analyzed with caution due to low base size.

** Average based upon product categories comparable year over year.

CANADA

- Caps generate the highest number of impressions per month, with 1,007 each time the item is worn.
- Jackets generate 579 impressions in Canada, over twice what is generated in the U.S.

Length of time item is kept

- On average, promotional products are held for 5.7 months.
- Calendars are held the longest, at 7.5 months, followed closely by caps, at 7.2 months.

Total Impressions and Time an Item Is Kept – Canada

	2010 Impressions/Month	2010 Length of Time
Caps/Headwear	1,007	7.2
Writing Instruments	692	5.4
Bags	679	6.3
Jackets/Hoodies/Sweatshirts/Fleece	579	6.6
Shirts	440	6.2
Calendars	294	7.5
Desk/Office/Business Accessories	222	3.8
Food Items	124	1.0
Glassware/Ceramics (includes Mugs)	109	7.1
Health and Safety	76	6.8
AVG		5.7

GREAT BRITAIN

- In Great Britain, jackets generate the highest number of impressions per month, with 544, close to bags, with 524.

Length of time item is kept

- Promotional products are kept an average of 4.9 months, the shortest amount of any of the four countries in the study.

Total Impressions and Time an Item Is Kept – Great Britain

	2010 Impressions/Month	2010 Length of Time
Jackets/Hoodies/Sweatshirts/Fleece	544	6.4
Bags	524	5.3
Writing Instruments	454	4.8
Calendars	348	7.1
Caps/Headwear	297	4.8
Desk/Office/Business Accessories	265	5.2
Shirts	240	4.3
Food Items	156	1.0
Health and Safety Products	109	6.0
Glassware/Ceramics (includes Mugs)	82	5.1
AVG		4.9

AUSTRALIA

- As in Canada, caps generate the highest number of impressions per month, with 826.
- Conversely, bags generate the lowest of any country in the study.

Length of time item is kept

- Promotional products are kept an average of 5.5 months, very similar to the U.S. and Canada.

Total Impressions and Time an Item is Kept – Australia

	2010 Impressions/Month	2010 Length of Time
Caps/Headwear	826	6.0
Desk/Office/Business Accessories	476	5.0
Shirts	363	6.2
Jackets/Hoodies/Sweatshirts/Fleece	323	6.4
Writing Instruments	236	5.5
Calendars	226	7.9
Glassware/Ceramics (includes Mugs)	159	5.9
Bags	140	5.5
Food Items	114	1.0
AVG		5.5

Total Impressions/Cost per Impression

- With the exception of Recognition-Awards, the cost per impression of ad specialties is very low, costing only fractions of a cent per impression.
 - The cost per impression of a promotional product stayed virtually the same from 2008 to 2010, and is now .005 cents

Impressions Summary Cost – U.S.

	Total Impressions	Average Cost	2010 Cost per Impression (cents)	2008 Cost per Impression (cents)
Total			0.005	0.004
Bags	7,224	\$10	0.001	0.002
Caps/Headwear	2,984	\$6	0.002	0.002
Electronics/Computer	2,243	\$13	0.006	n/a
Shirts	2,208	\$11	0.005	0.005
Writing Instruments	2,005	\$3	0.001	0.002
Calendars	1,984	\$5	0.003	0.003
Recognition Awards/Trophies/Plaques	1,634	\$35	0.021	0.021
Desk/office/Business Accessories	1,324	\$10	0.008	0.007
Glassware/ceramics (includes Mugs)	1,307	\$5	0.004	0.004
Automotive	1,227	\$6	0.005	n/a
Jackets/Hoodies/Sweatshirts/Fleece	1,002	\$50	0.050	n/a
Health and Safety Products	355	\$2	0.006	n/a
Food Items	93	\$7	0.076	n/a

Cost per impression of other media

- Advertising specialties are less expensive per impression than other media.
- The investment in advertising specialties is modest, more targeted and achievable by smaller business than other forms of advertising.

Cost Per Impression

Prime Time TV (1)	0.018
Syndicated (Day) TV (1)	0.005
Cable TV (Prime Time) (1)	0.005
National Magazine (1)	0.045
Spot Radio (1)	0.058
Billboard (2)	0.002
Newspaper (3)	0.029
Internet (4)	0.003

Cost per Impression by Media

Prime Time TV	National Magazines	Spot Radio	Ad Specialties
\$0.018	\$0.045	\$0.058	\$0.005

(1) Source: 2010 The Nielsen Company. Numbers derived by ASI from data provided by Nielsen.
 (2) Source: Outdoor Advertising Association of America
 (3) Source: Columbus Dispatch
 (4) Source: AdAgeOnline.com

FAST FACT:
 Ad specialties deliver a better cost per impression than most other media.

- Great Britain has the highest cost per impression, mostly due to the difference in promotional product costs.

Cost per Impression: All Countries (in \$U.S.)

	U.S.	Canada	Great Britain	Australia
Average Cost per Impression	0.005	0.004	0.008	0.005

Ability to Identify Advertiser

Are you able to identify the advertiser of the item?

- 83% in the U.S. indicated they could identify the advertiser on a promotional item they own, very similar to 2008 (84%).
- Britons feel they have the best memory, as 94% thought they could identify the advertiser on an item.
- As one would expect, items that are the most frequently used have the highest advertiser recall. Glassware/ceramics (87%) and shirts (86%) have the highest recall.
- Electronics/computer items have the lowest recall (31%), suggesting a need for better advertiser identification.

Ability to Identify Advertiser

	U.S. (2010)	U.S. (2008)	Canada	Great Britain	Australia
Total	83%	84%	92%	94%	80%
Glassware/Ceramics (includes Mugs)	87%	84%	97%	83%	67%
Shirts	86%	87%	88%	86%	92%
Writing Instruments	84%	85%	86%	88%	82%
Bags	82%	90%	98%	97%	89%
Calendar	82%	69%	88%	82%	73%
Health and Safety Products	82%	n/a	92%	78%	70%
Caps/Headwear	81%	89%	91%	88%	88%
Food Items	79%	n/a	94%	83%	88%
Recognition-Awards/Trophies/Plaques	79%	85%	n/a	n/a	n/a
Jackets/Hoodies/Sweatshirts/Fleece	77%	n/a	95%	88%	96%
Desk/Office/Business Accessories	70%	67%	87%	84%	61%
Automotive*	63%	n/a	n/a	n/a	n/a
Electronics/Computer*	31%	n/a	n/a	n/a	n/a

*Results should be analyzed with caution due to low base size.

Reasons for Keeping Item

Why do you keep the item you received?

- About three-quarters of respondents indicated that an item's usefulness is the primary reason to keep it, while Australians are even more pragmatic and cited usefulness 82% of the time.

Reason for Keeping Item: All Countries Summary

	U.S. (2010)	U.S. (2008)	Canada	Great Britain	Australia
Useful	75%	81%	74%	73%	82%
Attractive	27%	26%	28%	20%	18%
It's enjoyable to have	19%	n/a	22%	17%	8%
Refer to information like phone numbers	6%	3%	6%	6%	6%
Some other reason	10%	n/a	11%	15%	11%

- Calendars, writing instruments, health and safety items and bags are most frequently kept because they're useful.
- Recognition awards are kept by 43% because they're enjoyable to have, while calendars are kept for reference by 21%.

Reason for Keeping Item: U.S. Only by Product

	Useful	Attractive	Enjoyable to have	Reference	Other
Calendars	91%	37%	21%	21%	7%
Writing Instruments	90%	18%	14%	8%	5%
Health and Safety Products	89%	9%	9%	0%	9%
Bags	88%	29%	15%	4%	11%
Desk/Office/Business Accessories	87%	29%	25%	10%	8%
Glassware/Ceramics (includes Mugs)	73%	27%	21%	2%	13%
Shirts	65%	41%	25%	2%	14%
Jackets/Hoodies/Sweatshirts/Fleece	64%	27%	18%	0%	14%
Automotive	63%	0%	38%	0%	0%
Electronics/Computer	62%	12%	19%	4%	4%
Caps/Headwear	48%	40%	27%	1%	19%
Recognition-Awards/Trophies/Plaques	43%	21%	43%	0%	29%

Familiarity With Advertiser

Was the advertiser familiar to you before you received the item?

- Over three-quarters (78%) of U.S. respondents indicated they were familiar with an advertiser before they received the item, similar to 2008 (83%). The inclusion of items with lower awareness, such as electronics and health, likely pulled down the average score in 2010.
- Glassware/ceramics have advertisers that were the most familiar, as 87% indicated they knew the advertiser prior to receiving the item.
- Electronics have advertisers that were the least familiar with the advertisers (40%), but low recall of the advertiser could contribute to the finding.
- Canadians are most likely to be familiar with the advertisers on their jackets, as 97% said they were familiar, while 92% of Australians were familiar with shirt advertisers.

% Indicating Familiar With Advertiser Before Receiving Item

	U.S. (2010)	U.S. 2008)	Canada	Great Britain	Australia
Total	78%	83%	83%	73%	77%
Recognition-Awards/Trophies/Plaques	93%	85%	n/a	87%	n/a
Glassware/Ceramics (includes Mugs)	87%	83%	89%	78%	78%
Caps/Headwear	82%	86%	85%	67%	84%
Calendar	81%	77%	88%	82%	77%
Shirts	78%	85%	79%	71%	92%
Food Items	76%	n/a	76%	70%	75%
Writing Instruments	75%	84%	75%	77%	80%
Bags	73%	86%	85%	60%	83%
Jackets/Hoodies/Sweatshirts/Fleece	73%	n/a	97%	75%	71%
Health and Safety Products	69%	n/a	88%	50%	80%
Desk/Office/Business Accessories	68%	70%	84%	66%	57%
Automotive	63%	n/a	n/a	n/a	n/a
Electronics/Computer	40%	n/a	n/a	n/a	n/a

Existing Customers

Had you ever done business with the advertiser before you received the item?

- Ad specialties are likely to have been given to existing customers, as over three-quarters (78%) in the U.S. and 81% in Canada had done business with the advertiser before receiving the item.
- Less than two-thirds (64%) in Great Britain indicated they'd done business with the advertiser before.

Done Business With Advertiser Before Receiving Item – All Countries

	U.S.	Canada	Great Britain	Australia
Had done business before	78%	81%	64%	76%

- Among those receiving glassware/ceramics or recognition-awards, 85% had done business with the advertiser.

Done Business With Advertiser Before Receiving Item – U.S. Only

	2010	2008
Total	78%	65%
Electronics/Computer*	98%	n/a
Automotive*	97%	n/a
Recognition-Awards/Trophies/Plaques	85%	83%
Glassware/Ceramics (includes Mugs)	85%	69%
Calendars	81%	61%
Health and Safety Products	81%	n/a
Bags	80%	72%
Writing Instruments	79%	58%
Shirts	76%	66%
Desk/Office/Business Accessories	75%	62%
Caps/Headwear	73%	66%
Food Items	70%	n/a
Jackets/Hoodies/Sweatshirts/Fleece	69%	n/a

**Results should be analyzed with caution due to low base size.*

Impressions of Advertiser

Which of the following best describes your impression of the advertiser after receiving the item?

- 41% of U.S. respondents indicated their impression of the advertiser was more favorable after receiving a promotional product. Nearly one-half (47%) of Canadian respondents had a more favorable impression.

	U.S.	Canada	Great Britain	Australia
More favorable (net)	41%	47%	41%	41%
Significantly more favorable	11%	12%	9%	10%
Somewhat more favorable	30%	35%	32%	31%

- Among respondents of all promotional products received, 41% indicated that their impression of the advertiser had become either significantly or somewhat more favorable after receiving the item.
- This was especially true among receivers of awards, as nearly two-thirds (64%) had a more favorable view of the advertiser/award giver.

Impression of Advertiser After Receiving the Item Significantly/Somewhat More Favorable – U.S. Only

	2010	2008
Total	41%	42%
Recognition-Awards/Trophies/Plaques	64%	23%
Automotive	50%	n/a
Shirts	47%	49%
Bags	45%	53%
Caps/Headwear	45%	45%
Food Items	44%	n/a
Jackets/Hoodies/Sweatshirts/Fleece	41%	n/a
Calendars	39%	31%
Desk/Office/Business Accessories	38%	35%
Writing Instruments	38%	30%
Health and Safety Products	36%	n/a
Glassware/Ceramics (includes Mugs)	31%	39%
Electronics/Computer	30%	n/a

Business After Receiving a Promotional Product

Since receiving the item, have you actually done any business with the advertiser?

- 60% of respondents in the U.S. have done business with the advertiser after receiving an item.
- Over one-half of respondents across all countries indicated that they'd done business with the advertiser after receiving an item.

Done Business With Advertiser After Receiving Item – Total by Country

	U.S.	Canada	Great Britain	Australia
Have done business	60%	65%	51%	55%

- The percentage of those who indicated in 2008 that they had done business with the advertiser after receiving the item is very similar to 2010, 62% vs. 60%, respectively.
- Awards and bags both fell from 2008 levels, while calendars went up six percentage points to 65%.

Done Business With Advertiser After Receiving Item – U.S. Only

	2010	2008
Total	60%	62%
Recognition-Awards/Trophies/Plaques	71%	77%
Glassware/Ceramics (includes Mugs)	70%	65%
Shirts	65%	70%
Calendars	65%	59%
Bags	59%	68%
Caps/Headwear	57%	67%
Writing Instruments	57%	53%
Desk/Office/Business Accessories	56%	52%
Electronics/Computer	55%	n/a
Food Items	55%	n/a
Jackets/Hoodies/Sweatshirts/Fleece	50%	n/a
Automotive	50%	n/a
Health and Safety Products	46%	n/a

Likelihood to Do Business in the Future

(Among those who had not done business with advertiser since receiving item)

If no, please state how likely you would be to do business with the advertiser after receiving the item.

- Among those who had not done business already, 27% in the U.S. thought it likely they would. In Canada, this was ten percentage points higher, at 37%.

Likelihood of Doing Business With Advertiser After Receiving Item

	U.S.	Canada	Great Britain	Australia
More likely (net)	27%	37%	27%	31%
Significantly more likely	5%	8%	2%	4%
Somewhat more likely	22%	29%	25%	28%

- Findings from 2010 are similar to 2008, with over one-quarter (27%) reporting that they would be significantly or somewhat more likely to do business with the advertiser in the future.

Likelihood of Doing Business With Advertiser After Receiving Item – U.S. Only

	2010	2008
Total	27%	24%
Shirts	34%	21%
Calendars	33%	36%
Bags	32%	26%
Writing Instruments	32%	23%
Caps/Headwear	31%	14%
Food Items	31%	n/a
Recognition-Awards/Trophies/Plaques*	25%	27%
Automotive*	25%	n/a
Electronics/Computer*	22%	n/a
Desk/Office/Business Accessories	21%	0%
Glassware/Ceramics (includes Mugs)	19%	0%
Jackets/Hoodies/Sweatshirts/Fleece	18%	n/a
Health and Safety Products	16%	n/a

*Results should be analyzed with caution due to low base size.

Fate of Items Not Planned to Keep

When you receive a promotional product you don't plan to keep, which of the following best describes your action?

- After receiving a promotional product they don't plan to keep, nearly two-thirds (62%) of respondents in the U.S. indicated that they give the item to someone else. This is up 11 percentage points from two years ago, while those that indicated they throw the item away dropped 12 percentage points, to 22%.
- Australians are the most likely to give the item to someone else, according to 68% of respondents.

	U.S. (2010)	U.S. (2008)	Canada	Great Britain	Australia
Throw item away	22%	34%	16%	22%	15%
File the item away and never notice it again	15%	20%	22%	19%	15%
Give the item to someone else	62%	51%	62%	59%	68%

Number of Promotional Products Owned

Approximately how many promotional products do you own?

- U.S. residents have the most promotional products (9.6), while Australians have the least (8.3).
- Findings are consistent with 2008, when the average number of promotional products in the U.S. was 9.8.

	U.S. (2010)	U.S. (2008)	Canada	Great Britain	Australia
1-5	38%	35%	37%	38%	41%
6-10	28%	29%	32%	36%	36%
11-15	14%	16%	13%	15%	10%
16-20	7%	8%	7%	4%	3%
21 or more	13%	12%	11%	6%	10%
AVG	9.6	9.8	9.4	8.4	8.3

Importance of Brands

How important are well-known consumer brands to you when you receive a promotional product?

- Brands are important to over one-half (57%) of respondents in the U.S. However, only 18% consider them very important.
- Australians are the least impressed by brands, with 49% indicating they were not important at all, and only 7% stating they were very important.

	U.S.	Canada	Great Britain	Australia
Important (net)	57%	61%	57%	51%
Very Important	18%	13%	16%	7%
Somewhat Important	39%	48%	41%	44%
Not Important	43%	40%	42%	49%

Respondent Segmentation

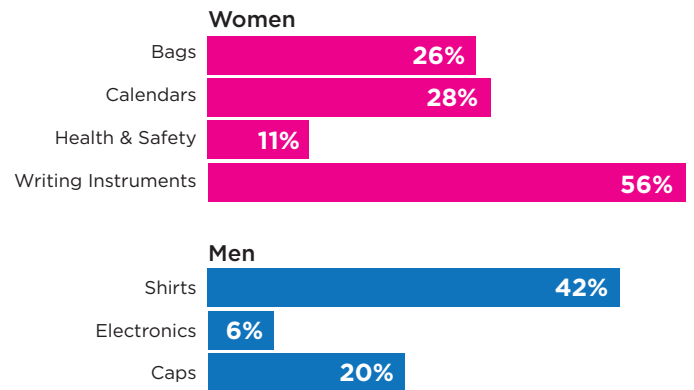
Gender (all respondents)

- Males are more likely than females to own shirts and caps, while females are more likely than males to have bags, writing instruments, calendars and health and safety products.
- Females are more inclined than males to give away a product they don't plan to keep, 68% to 56%, respectively.
- On average, males own more promotional products than females, 9.6 items vs. 8.9 items.

Types of Items Owned

	Male	Female
Writing Instruments	46%	56%
Shirts	42%	30%
Caps/Headwear	20%	12%
Calendars	19%	28%
Bags	16%	26%
Desk/Office/Business Accessories	16%	18%
Glassware/Ceramics (includes Mugs)	13%	14%
Food Items	12%	14%
Health and Safety Products	8%	11%
Electronics/Computer	6%	2%
Jackets/Hoodies/Sweatshirts/Fleece	5%	6%
Recognition-Awards/Trophies/Plaques	2%	3%
Automotive	2%	0%

Promotional Products by Gender



FAST FACT:
Women prefer writing instruments more than men do, while men favor shirts.

When you receive a promotional product you don't plan to keep, which of the following best describes your action?

	Male	Female
Throw item away	23%	17%
File the item away and never notice it again	21%	15%
Give the item to someone else	56%	68%

Number of items owned

	Male	Female
Average Number Owned	9.6	8.9

How important are well-known consumer brands to you when you receive a promotional product?

	Male	Female
Important (net)	59%	57%
Very Important	18%	13%
Somewhat Important	41%	43%
Not Important	42%	43%

Impact of Gender and Age

- As men get older, to age 64, they are more likely to keep a cap they receive.
- Conversely, as men age, they are less inclined to have a bag.
- As women age, they are more likely to have writing instruments or calendars.
- As women get older, to age 64, they are more inclined to give away an item they do not plan to use.

Types of Items Owned by Gender and Age: Males

	21 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years	65 years and over
Shirts	44%	40%	39%	44%	33%
Caps/headwear	16%	19%	24%	27%	13%
Jackets/Hoodies/Sweatshirts/Fleece	4%	7%	5%	5%	7%
Bags	19%	15%	13%	14%	7%
Writing Instruments	43%	41%	52%	56%	27%
Health and safety products	11%	8%	4%	3%	7%
Recognition-Awards/Trophies/Plaques	1%	3%	3%	3%	7%
Glassware/Ceramics (includes Mugs)	12%	12%	18%	15%	7%
Desk/Office/Business accessories	17%	11%	19%	20%	13%
Calendars	15%	22%	19%	29%	20%
Electronics/Computer	8%	7%	6%	2%	0%
Automotive	3%	2%	1%	2%	0%
Food Items	13%	14%	11%	5%	20%

Promotional Products By Age



FAST FACT:
People ages 45 to 54 own the most promo products.

Types of Items Owned by Gender and Age: Females

	21 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years	65 years and over
Shirts	32%	33%	27%	25%	30%
Caps/headwear	12%	10%	15%	13%	10%
Jackets/Hoodies/Sweatshirts/Fleece	5%	6%	8%	3%	10%
Bags	23%	28%	26%	33%	20%
Writing Instruments	50%	56%	58%	69%	40%
Health and Safety Products	16%	6%	8%	9%	20%
Recognition-Awards/Trophies/Plaques	3%	5%	2%	3%	0%
Glassware/Ceramics (includes Mugs)	14%	15%	13%	15%	20%
Desk/Office/Business Accessories	19%	16%	19%	21%	10%
Calendars	18%	29%	37%	36%	40%
Electronics/Computer	3%	2%	2%	1%	0%
Automotive	1%	0%	1%	0%	0%
Food Items	17%	11%	18%	9%	0%

When you receive a promotional product you don't plan to keep, which of the following best describes your action?

Action Taken: Females

	21 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years	65 years and over
Throw item away	19%	17%	15%	15%	20%
File the item away and never notice it again	20%	21%	11%	3%	20%
Give the item to someone else	61%	63%	74%	82%	60%

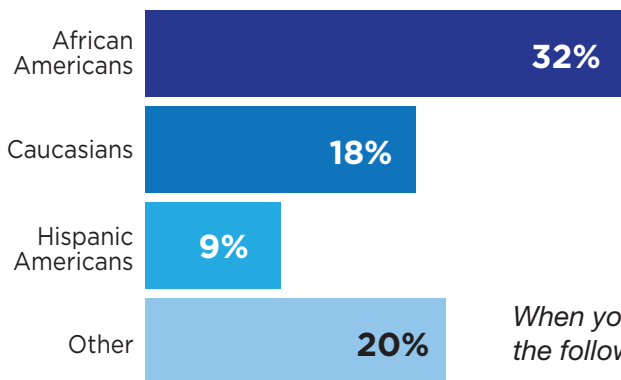
Race (U.S. Only)

- African Americans are more inclined to have received and kept caps/headwear and bags than any other ethnicity reported in the study, as nearly one-third (32%) reported having a cap and 37% a bag. They also have more promotional products on average (11.3) than any other group.
- More than eight out of 10 (82%) Hispanics reported having a writing instrument, the highest of any ethnicity in the study.

Types of Items Owned

	African American	Caucasian	Hispanic	Other
Shirts	42%	41%	27%	60%
Caps/Headwear	32%	18%	9%	20%
Jackets/Hoodies/Sweatshirts/Fleece	16%	4%	9%	0%
Bags	37%	28%	27%	30%
Writing Instruments	58%	61%	82%	75%
Health and Safety Products	0%	5%	0%	0%
Recognition-Awards/Trophies/Plaques	0%	3%	9%	0%
Glassware/Ceramics (includes Mugs)	16%	12%	27%	5%
Desk/Office/Business Accessories	16%	22%	27%	25%
Calendars	32%	37%	18%	50%
Electronics/Computer	0%	3%	0%	5%
Automotive	0%	0%	0%	0%
Food Items	26%	12%	9%	10%

Caps by Race



FAST FACT:
African Americans prefer caps more than those of other ethnicities.

When you receive a promotional product you don't plan to keep, which of the following best describes your action?

	African American	Caucasian	Hispanic	Other
Throw item away	21%	10%	27%	25%
File the item away and never notice it again	5%	8%	18%	10%
Give the item to someone else	74%	82%	55%	65%

Number of items owned

	African American	Caucasian	Hispanic	Other
Average Number Owned	11.3	10.3	9.4	8.9

How important are well-known consumer brands to you when you receive a promotional product?

	African American	Caucasian	Hispanic	Other
Important (net)	42%	58%	64%	90%
Very Important	5%	17%	9%	25%
Somewhat Important	37%	41%	55%	65%
Not Important	58%	42%	36%	10%

Household Income (U.S. Only)

- Over one-third (36%) of those with incomes under \$50,000 have bags, while over two-thirds (68%) of those with incomes between \$50,000 and \$99,999 have writing instruments.
- As income rises, respondents are more inclined to throw away an item they don't plan to keep and less inclined to give it to someone else.

Types of items owned

	Less than \$50,000	\$50,000-\$99,999	\$100,000 plus
Writing Instruments	61%	68%	55%
Shirts	42%	40%	40%
Calendars	38%	37%	30%
Bags	36%	24%	28%
Desk/Office/Business Accessories	28%	21%	13%
Caps/Headwear	22%	20%	13%
Food Items	11%	15%	13%
Glassware/Ceramics (includes Mugs)	10%	17%	8%
Jackets/Hoodies/Sweatshirts/Fleece	6%	3%	5%
Health and Safety Products	4%	5%	5%
Electronics/Computer	3%	2%	5%
Recognition-Awards/Trophies/Plaques	2%	3%	3%
Automotive	0%	0%	0%

When you receive a promotional product you don't plan to keep, which of the following best describes your action?

	Less than \$50,000	\$50,000-\$99,999	\$100,000 plus
Throw item away	8%	13%	23%
File the item away and never notice it again	7%	8%	10%
Give the item to someone else	85%	79%	68%

Number of items owned

	Less than \$50,000	\$50,000-\$99,999	\$100,000 plus
Average Number of Items Owned	9.8	10.9	9.8

How important are well-known consumer brands to you when you receive a promotional product?

	Less than \$50,000	\$50,000-\$99,999	\$100,000 plus
Important (net)	60%	58%	63%
Very Important	20%	12%	18%
Somewhat Important	40%	46%	45%
Not Important	40%	42%	38%

Political Affiliation (U.S. Only)

- Independents get more promotional T-shirts than either Democrats or Republicans, but are less inclined than Democrats or Republicans to take free pens.
- Republicans are more than 1.5 times more likely to accept a free promotional food item than either Democrats or Independents.
- 86% of Republicans give away the freebies they don't plan to keep.
- 75% of Independents prefer consumer-branded products – nearly 1.5 times more than Democrats or Republicans.
- Independents value promotional freebies the most; on average, they own 11.6 logoed products, compared to 9.4 for Democrats and 10.3 for Republicans.

Types of Items Owned

	Democrat	Republican	Independent
Writing Instruments	69%	66%	56%
Calendars	40%	34%	40%
Shirts	36%	38%	44%
Bags	26%	16%	30%
Desk/Office/Business Accessories	21%	16%	21%
Caps/Headwear	14%	25%	23%
Glassware/Ceramics (includes Mugs)	14%	13%	14%
Food Items	12%	19%	14%
Jackets/Hoodies/Sweatshirts/Fleece	7%	3%	2%
Recognition-Awards/Trophies/Plaques	5%	3%	0%
Health and Safety Products	2%	6%	5%
Electronics/Computer	2%	6%	2%
Automotive	0%	0%	0%

When you receive a promotional product you don't plan to keep, which of the following best describes your action?

	Democrat	Republican	Independent
Throw item away	19%	7%	19%
File the item away and never notice it again	5%	7%	3%
Give the item to someone else	76%	86%	78%

Number of items owned

	Democrat	Republican	Independent
Average Number of Items Owned	9.4	10.3	11.6

How important are well-known consumer brands to you when you receive a promotional product?

	Democrat	Republican	Independent
Important (net)	52%	58%	75%
Very Important	14%	9%	16%
Somewhat Important	38%	49%	59%
Not Important	48%	42%	25%

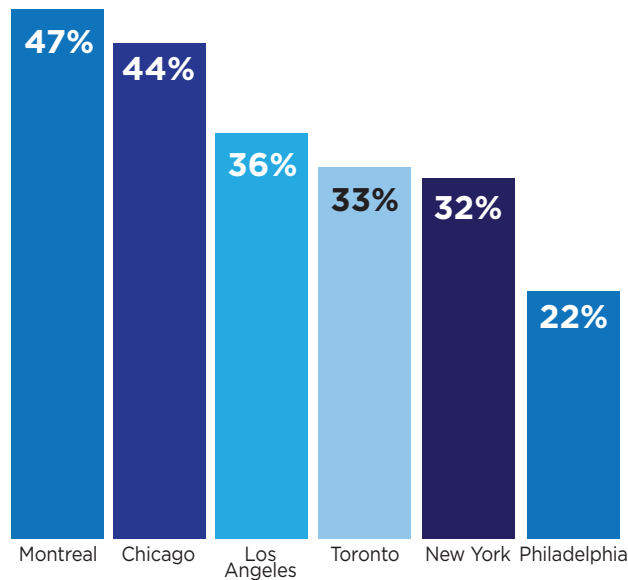
Metro Areas

- Nearly one-half (44%) of those in Chicago have shirts; the same percentage of those in Los Angeles have writing instruments, while a quarter (24%) of Chicago residents have bags.
- Food items are particularly prevalent in New York and Montreal, 37% and 25%, respectively.
- In Toronto, respondents are more likely to file away an item they don't plan to use, and less likely to throw it away, than any other metro.
- Los Angeles has the highest average number of items owned, at 12.7.

Types of items owned

	Philadelphia	New York	Los Angeles	Chicago	Toronto	Montreal	London
Shirts	22%	32%	36%	44%	33%	47%	25%
Writing Instruments	22%	10%	44%	32%	28%	36%	46%
Health and Safety Products	16%	17%	8%	6%	5%	28%	0%
Glassware/Ceramics (includes Mugs)	12%	2%	8%	9%	10%	17%	11%
Bags	10%	7%	10%	24%	13%	9%	14%
Calendars	10%	0%	10%	6%	10%	19%	4%
Food Items	10%	37%	5%	3%	13%	25%	7%
Caps/Headwear	8%	5%	10%	21%	25%	23%	4%
Automotive	8%	2%	0%	3%	0%	3%	0%
Desk/Office/Business Accessories	6%	10%	3%	18%	3%	14%	9%
Jackets/Hoodies/Sweatshirts/Fleece	4%	0%	5%	0%	5%	5%	5%
Electronics/Computer	4%	7%	0%	12%	5%	3%	11%
Recognition-Awards/Trophies/Plaques	0%	0%	8%	3%	0%	5%	4%

Logoed Shirts by City



FAST FACT:
Montreal residents favor shirts more than residents of other large cities.

When you receive a promotional product you don't plan to keep, which of the following best describes your action?

	Philadelphia	New York	Los Angeles	Chicago	Toronto	Montreal	London
Throw item away	37%	32%	36%	41%	10%	30%	28%
File the item away and never notice it again	37%	22%	18%	9%	50%	20%	24%
Give the item to someone else	27%	46%	46%	50%	40%	50%	48%

Number of items owned

	Philadelphia	New York	Los Angeles	Chicago	Toronto	Montreal	London
Average Number of Items Owned	6.8	8.8	12.7	9.8	9.3	8.3	10.3

How important are well-known consumer brands to you when you receive a promotional product?

	Philadelphia	New York	Los Angeles	Chicago	Toronto	Montreal	London
Important (net)	52%	49%	41%	62%	48%	50%	56%
Very Important	14%	32%	8%	9%	10%	14%	16%
Somewhat Important	38%	17%	33%	53%	38%	36%	40%
Not Important	48%	51%	59%	38%	53%	50%	44%

Demographic Information

Age	%	Count
21 to 34 years	36%	350
35 to 44 years	22%	212
45 to 54 years	25%	246
55 to 64 years	15%	147
65 years and over	3%	25

Gender	%	Count
Male	48%	469
Female	52%	510

Country	%	Count
United States	51%	497
Canada	21%	208
Great Britain	16%	158
Australia	11%	104
Other	2%	17

Interview Location	%	Count
Philadelphia	15%	50
New York	13%	43
Los Angeles	11%	39
Chicago	12%	41
Toronto	14%	49
Montreal	19%	64
London	16%	56