GLOBAL ADVERTISING SPECIALTIES IMPRESSIONS STUDY

V.4

A cost analysis of promotional products versus other advertising media

Released at the 2013 ASI Power Summit

A PDF of this report (plus end buyer-friendly, downloadable charts) can be found at asicentral.com/study

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# Table of Contents

Introduction .................................................................................................. 3

## Section One

Product Popularity ................................................................................... 4
Product Spotlight: Writing Instruments ..................................................... 5
Product Spotlight: Shirts ........................................................................ 6
Product Spotlight: Bags .......................................................................... 7
Product Spotlight: Calendars .................................................................... 8
Product Spotlight: Desk Accessories ....................................................... 9
Product Spotlight: Caps/Headwear .......................................................... 10
Product Spotlight: Drinkware ................................................................... 11
Product Spotlight: USB Drives ................................................................. 12
Product Spotlight: Health & Safety Items ................................................ 13
Product Spotlight: Outerwear ................................................................. 14
Staying Power ......................................................................................... 15
Promo Products are Passed Along — Usefulness is Key ......................... 16
How Many Items Do People Own? ......................................................... 18

## Section Two

Recipients’ Views on Advertisers ............................................................... 19
Swaying Opinions ................................................................................... 20
Ad Specialties Generate New Business .................................................... 21
Location of Promotional Products ............................................................ 22

## Section Three

Promotional Products Make an Impression ............................................. 23
The Cost-Effectiveness of Ad Specialties .................................................. 25
Demographics ......................................................................................... 26
The ASI Ad Impressions Study was first launched in 2006 by ASI's research team to give its members powerful data that proves ad specialties are one of the most high-impact, cost-effective ad mediums available.

Through thousands of live and online interviews with businesspeople and college students in key cities in the United States, Canada, Europe and Australia, the study gauges consumer perceptions of promotional products and how they influence buying decisions; highlights the popularity of key promo product categories by demographic group (such as age, race, sex and gender); reveals the cost-per-impression of top advertising specialty product categories; and shows the cost-per-impression of promotional products compared to other forms of advertising media, like radio, TV and Internet advertising. The study is conducted by ASI annually.

Methodology

This report contains results from the 2012 study and additional research which took place in 2013. For the 2013 phase of the study, conducted during May through July of 2013, ASI's research team and business partners interviewed businesspeople in nine metro areas: Atlanta, Boston, Houston, Phoenix, San Francisco, Madrid, Rome, Berlin/Düsseldorf and Sydney. In Germany, ASI partnered with PSI (Promotional Product Service Institute) to administer the surveys, while Pantheon Systems conducted the research in Sydney, Australia. Respondents in all regions were asked questions about the promotional products they had received, including how many they had, how they used them, why they kept them, and their impressions of the advertisers that gave them the items.

Further, an online panel survey was conducted among recipients of advertising specialties in those same geographic areas to augment the sample from the man-on-the-street interviews. All respondents were at least 18 years old.

Results from the 2012 ASI Ad Impressions Study have been incorporated here so that additional metro areas can be included in the analysis as well as providing a more robust view of the U.S. Last year there were 12 metro areas: New York, Chicago, Miami, Los Angeles, Seattle, Dallas, Philadelphia, London, Paris, Toronto, Vancouver and Montreal. This brings the total number of metro areas covered by the report over the two-year period to 21, eight of which took place outside of the U.S. There are responses from eight different countries in the report.

The total combined number of interviews, both in person and online, for both waves of this study is 7,145.

How This Report is Organized

This report contains three sections:

- **“Product Popularity”** (Pages 4 to 18) highlights the most popular promotional products by category, and includes detailed demographic breakdowns by geography, gender, race, age, income and political affiliation. For example, on the “Product Spotlight: Writing Instruments” section on page 5, you’ll note that women are significantly more likely than men to own a logoed pen or pencil, and over one-half of Caucasians own branded writing instruments. This section will be a helpful tool for distributors to use in guiding their clients toward products that will be the most impactful in their marketing efforts.

- **“Recipients’ Views on Advertisers”** (Pages 19 to 22) reveals important information showcasing how long businesspeople hold onto logoed items; what they do with items they don’t wish to keep; and how many total promotional items they own, broken out by a variety of demographic groups. This section provides hard data to combat objections from buyers who may think that promotional items are “throwaways” or “afterthoughts” in a marketing campaign, and may not understand their true value.

- **“Promo Products Make an Impression”** (Pages 23 to 25) highlights the industry products that deliver the best cost-per-impression and compares the cost-per-impression of ad specialties to other forms of media, like Internet and radio advertising. This is a great tool distributors can use to convince end-buyers to allocate more of their marketing dollars to promotional products.

While this report includes the study’s highlights, ASI members can go online at www.asicentral.com/study for a research tool that will allow them to gain access to the full study data.

Note: All demographic breakdowns (age, race, gender, etc.) reflect U.S. consumers only. Respondents from other countries are represented in aggregate.
Section One

Product Popularity

Key Takeaways

For this section, respondents were asked to provide up to three promotional items they had received in the last 12 months. Promotional items were defined as items that include pens, T-shirts, mugs, calendars or any items that have a logo or message from an advertiser on them; they are usually given away for free to consumers in hopes of positively influencing their purchasing preferences or their attitudes toward the advertiser.

As the chart below reveals, writing instruments were most commonly cited, as one-half (50%) of promotional product recipients in the 12 cities in the U.S. reported getting at least one in the prior 12 months, similar to the 52% that reported getting them in Sydney. There are also significant differences in cities in other countries, such as 53% of study respondents in Rome who received a shirt, higher than any other metro area, or 66% that had writing instruments in Philadelphia.
More Women than Men Own Promo Pens & Pencils

53% 47%

50% of U.S. Consumers Own Logoed Writing Instruments

Logoed pens and pencils tie bags for the lowest cost-per-impression in the United States.

1/10th of a cent

66% LOVE

Philadelphians continue to love writing instruments the most. 66% say they own a branded pen or pencil, vs. 50% in the U.S. overall.

5,788

Rome generates the most product impressions of any European city.

52% DOWN UNDER

Writing instruments are more popular than in the U.S. 52% of Aussies own a branded writing instrument.
Product Spotlight: Shirts

44% of U.S. consumers own a promotional shirt.

Viva Italia!

Romans love their gelato... and their promo tees. 53% of consumers in Rome own branded shirts — the highest percentage of any of the 21 metro areas in the survey.

Tee it up!

Although they’re popular among all age groups, younger consumers are most likely to own a branded shirt.

Men own more promo shirts than women.

46% of independent voters report owning a promotional shirt. 40% of Democrats and 41% of Republicans make the same claim.

The vote is in.

53% of Latino consumers own a promotional T-shirt, the most of any racial demographic.

Independent - 40%
Democratic - 46%
Republican - 41%

52% of Latino consumers own a promotional T-shirt, the most of any racial demographic.

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Logoed bags tie with writing instruments as having the lowest cost-per-impression of any promotional item in the United States.

1/10th of a cent

31% of U.S. consumers own a promotional bag

37% The percentage of African Americans who own promo bags – the highest percentage of any racial demographic.

5,983 Bags generate more impressions in the United States than any other promotional item.

Politically Speaking
33% of Democrats own logoed bags, compared to 27% of Republicans and 27% of Independents.

By the Bay
In the United States, San Franciscans are most likely to own a promotional bag.

38% of consumers there have received one in the last 12 months.

Women are more likely than men to own branded bags

Income Gap
People who make less than $50,000 are most likely to carry promo bags.

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Product Spotlight: Calendars

27% of consumers in Houston own promotional calendars. That’s five percentage points above the U.S. average.

26% Independent
The Votes are In
Independent voters were most likely to report having calendars.

22% of U.S. consumers own a promotional calendar.

Staying Power
Not surprisingly, calendars are held onto longer than all other promotional products — nine months on average, compared to seven months for the average ad specialty.

On Display
Promotional calendars are great branding tools.

76% of consumers who own calendars say they display them prominently in their homes or offices.

Better With Age
Branded calendars are especially popular among older consumers.

37% have one in their possession now.

Northern Exposure
Of all the metro areas, consumers in Montreal have the most branded calendars.

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Product Spotlight: Desk Accessories

Go Blue!
Democrats are the most likely among the major political parties to own desk accessories.

Women Vs. Men
Women are more likely than men to own desk accessories.

Women: 24%
Men: 18%

Trending Young
Younger consumers are more likely to have desk accessories than older ones.

Australians are the most likely to have a branded desk accessory.

22% of U.S. consumers own a logoed desk accessory.

25% of U.S. Asian consumers who own desk accessories, the most of any racial demographic group.

25% of Sydney residents adorn their desks with pen sets, logoed phone chargers, business card holders and the like.

Democrats are the most likely among the major political parties to own desk accessories.

Women: 24%
Men: 18%

Democrats: 25%
Republicans: 19%
Independents: 18%

35-44: 25%
30-34: 20%
45-54: 19%
55+: 16%

34% of Australians are the most likely to have a branded desk accessory.

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Of U.S. consumers own a promotional cap

Men at Work
Male consumers are far more likely than females to own a branded cap.

Dollar Signs
Looking to target high earners? A cap might do the trick. Those who earn $100,000+ are more likely to wear a branded hat.

Seeing Red
22% of Republicans own promotional hats, versus 20% of Independents and 18% of Dems.

Hats off to Gen Xers
Caps are most popular among the 35- to 44-year-old segment.

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More women own branded drinkware than men.

Consumers under 35 own more drinkware than their older counterparts.

Branded drinkware is just as likely to be kept in the office as in the home.

Of all of the metro areas surveyed, Phoenix residents love their logoed mugs and glasses the most.

36% of consumers own promotional drinkware.

Cheers!

Consumers under 35 own more drinkware than their older counterparts.

Drinks in the Desert

Campaign Cups

Democrats report owning more drinkware than members of other political parties.

21% of U.S. consumers own branded drinkware.
11% OF U.S. CONSUMERS OWN A LOGOED USB DRIVE

Democrat = Techie?
13% of democratic voters own branded USB drives; 8% of Republicans own them and 11% of Independents have them on hand.

Deep Pockets
Six-figure earners are more likely to own a logoed USB drive than those in other economic groups.

Men are More Likely to Own a Branded USB Drive Than Women

27%
Merci!
Parisians are far more likely to own promotional USB drives than consumers in other cities: 27% own them vs. 11% of U.S. consumers.

Trending Young
Younger consumers are more likely to own a promo USB drive than their older counterparts.

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17% of African American consumers own branded health and safety items, the most of any racial demographic group.

Product Spotlight: Health & Safety Items

- **17%** of U.S. consumers own promotional health and safety products, the most in the United States.
- **17%** of Berlin residents own promotional health and safety products, the most in Europe.
- **17%** of San Franciscans own promotional health and safety items, the most in the United States.
- **82%** of U.S. consumers can immediately remember the advertiser’s name on the safety product they own.
- **9%** of Berlin residents own promotional health and safety products, the most in Europe.
- **17%** of San Franciscans own promotional health and safety items, the most in the United States.

YOUTHFUL CHOICES

Consumers between 21 and 34 were the most likely to own a logoed health and safety product.

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Total Recall
Jackets have the best advertiser recall of any promotional product. A whopping 95% of those who own logoed outerwear can recall the advertiser’s name.

Business-Builder
In the U.S., nearly half (48%) of all outerwear recipients say they were more likely to do business with an advertiser after they were given a logoed jacket.

Bundle Up!
Outerwear recipients think very favorably about the advertiser — especially in Sydney, where 86% of consumers think more positively about an advertiser after receiving a promotional jacket.

In the Money
Those with household incomes above $100,000 are slightly more likely to have branded outerwear than those with lower incomes.

To the Left
Democrats are more likely to have logoed jackets than members of other political parties.
Staying Power
In addition to identifying the logoed items they had kept, respondents were asked how long they kept the most recently-obtained item of each product type. On average, ad specialty items are kept for nearly seven months in the U.S. Overall, calendars are typically held the longest - about nine months on average. Writing instruments are held the shortest amount of time at just over five months.

Fun fact
The longest time an item was kept was in Madrid, where calendars were kept nearly 13 months. The shortest was in Rome, where writing instruments were kept only 4.1 months.

Key Takeaways
- One of the advantages promotional products have is that just one item can deliver a message for a far longer time period than other forms of advertising. Advertisers can reinforce their brand or a call to action for an average of seven months, and even longer on some products such as calendars and outerwear.
- Perhaps not surprisingly, calendars are kept for a long period. This offers advertisers obvious advantages, but because of their longevity, steps should be taken to keep the product noticed. For example, a changing image each month is key; so is positioning an advertiser’s logo in a prominent spot on each page.
Promo Products are Passed Along
Since the study was first conducted in 2008, U.S. recipients of ad specialties are increasingly passing them along, extending the advertisers’ reach. In fact, 63% of respondents in the U.S. said that when they receive a logoed item they no longer wish to keep, they give it to someone else. Canadian and Australian respondents were more likely to give an item to someone else (64%) than any other group examined.

Fun fact
Germans are the most likely to discard promotional products they no longer wish to keep; 28% disposed of them as compared to 17% in the U.S. Consumers in London are the least likely to throw away promotional products.

<table>
<thead>
<tr>
<th>Areas Interviewed</th>
<th>United States</th>
<th>Canada</th>
<th>London</th>
<th>Paris</th>
<th>Berlin</th>
<th>Rome</th>
<th>Madrid</th>
<th>Sydney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Throw it away</td>
<td>17%</td>
<td>18%</td>
<td>15%</td>
<td>21%</td>
<td>28%</td>
<td>23%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>File the item away</td>
<td>20%</td>
<td>18%</td>
<td>18%</td>
<td>21%</td>
<td>16%</td>
<td>29%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Give the item to someone else</td>
<td>63%</td>
<td>64%</td>
<td>67%</td>
<td>59%</td>
<td>56%</td>
<td>48%</td>
<td>54%</td>
<td>64%</td>
</tr>
</tbody>
</table>

In the United States, consumers in Dallas are the most likely to pass along the item to someone else: 75% pass along promotional items they don’t wish to keep.

Key Takeaways
- Promotional products are not simply thrown away. Items are kept because they’re useful, or given to someone who can use them. Advertisers’ messages often go beyond the initial target.
- As awareness of recycling in the U.S. has become more prevalent, so has the desire to pass along unwanted promotional products.
Usefulness is Key

Consumers will be much more likely to keep a promotional product that is useful, according to the survey. About eight in 10 (77%) of product recipients indicated that an item’s usefulness is the primary reason to keep it. In addition, 29% of recipients said they kept an item because it’s attractive, and 29% say they keep a promotional product simply because it’s “enjoyable to have.” Interestingly, it's nearly as important for outerwear to be attractive (60%) and enjoyable to have (51%) as it is to be useful (70%). In addition to being useful, the need for caps to be both attractive (42%) and enjoyable to have (41%) is also high.

Reasons for Keeping Products: U.S.

<table>
<thead>
<tr>
<th></th>
<th>Useful</th>
<th>Attractive</th>
<th>Enjoyable to have</th>
<th>Point of reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bags</td>
<td>83%</td>
<td>28%</td>
<td>23%</td>
<td>4%</td>
</tr>
<tr>
<td>Calendars</td>
<td>86%</td>
<td>33%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>Caps</td>
<td>59%</td>
<td>42%</td>
<td>41%</td>
<td>5%</td>
</tr>
<tr>
<td>Desk/Office</td>
<td>83%</td>
<td>22%</td>
<td>25%</td>
<td>8%</td>
</tr>
<tr>
<td>Drinkware</td>
<td>80%</td>
<td>31%</td>
<td>29%</td>
<td>2%</td>
</tr>
<tr>
<td>Health/Safety</td>
<td>79%</td>
<td>17%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Outerwear</td>
<td>70%</td>
<td>60%</td>
<td>51%</td>
<td>7%</td>
</tr>
<tr>
<td>Shirts</td>
<td>64%</td>
<td>37%</td>
<td>36%</td>
<td>3%</td>
</tr>
<tr>
<td>USB Drives</td>
<td>90%</td>
<td>10%</td>
<td>18%</td>
<td>4%</td>
</tr>
<tr>
<td>Writing Instruments</td>
<td>91%</td>
<td>19%</td>
<td>21%</td>
<td>8%</td>
</tr>
<tr>
<td>Average</td>
<td>77%</td>
<td>29%</td>
<td>29%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Fun fact

In Rome, ad specialties were kept because they were attractive 35% of the time, the highest of any metro area.

Areas Interviewed

<table>
<thead>
<tr>
<th></th>
<th>United States</th>
<th>Canada</th>
<th>London</th>
<th>Paris</th>
<th>Berlin</th>
<th>Rome</th>
<th>Madrid</th>
<th>Sydney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Useful</td>
<td>77%</td>
<td>82%</td>
<td>79%</td>
<td>70%</td>
<td>75%</td>
<td>70%</td>
<td>81%</td>
<td>80%</td>
</tr>
<tr>
<td>Attractive</td>
<td>29%</td>
<td>25%</td>
<td>33%</td>
<td>27%</td>
<td>31%</td>
<td>35%</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Enjoyable to have</td>
<td>29%</td>
<td>20%</td>
<td>23%</td>
<td>25%</td>
<td>21%</td>
<td>27%</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Point of reference</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>11%</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>
In the study, respondents were asked how many logoed items they currently had in their homes and/or offices. As indicated in the accompanying charts, people in the U.S. own an average of 9.8 promotional products. The number varies according to U.S. city, country, gender, race, income, age and political affiliation.

<table>
<thead>
<tr>
<th>City</th>
<th>Promotional Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>8.5</td>
</tr>
<tr>
<td>Canada</td>
<td>9.1</td>
</tr>
<tr>
<td>Spain</td>
<td>9.9</td>
</tr>
<tr>
<td>France</td>
<td>9.8</td>
</tr>
<tr>
<td>Italy</td>
<td>9.6</td>
</tr>
<tr>
<td>Germany</td>
<td>9.7</td>
</tr>
<tr>
<td>Australia</td>
<td>9.3</td>
</tr>
<tr>
<td>U.K</td>
<td>9.1</td>
</tr>
<tr>
<td>Miami</td>
<td>9.2</td>
</tr>
<tr>
<td>Seattle</td>
<td>9.9</td>
</tr>
<tr>
<td>Dallas</td>
<td>10.8</td>
</tr>
</tbody>
</table>

Typically, people have about 10 ad specialties. Asians have more ad specialties than any other group.

Democrats reported having the most promotional items in 2012 (10.5), a change from the prior year. Deeper support among Democrats for President Obama than the Republican challenger Mitt Romney could be part of the reason why.

**Key Takeaway**

Knowing the target audience can help any marketing initiative be more successful. While promotional products are widely valued, some groups have more than others, either by interest or opportunity.
Section Two: Recipients’ Views on Advertisers

Recipients’ Views on Advertisers

For this section, we asked respondents whether they could identify the advertisers on the promotional items they currently owned. The result: Nearly nine in 10 (86%) U.S. recipients of promotional merchandise can identify the advertiser on the item, the highest of any country in the study. As the graphic below reveals, of all major product categories, outerwear has the highest recognition of all promotional items: 95% of respondents who have logoed outerwear can name the advertiser on the items. Overall, wearables as a whole maintain a very high advertiser awareness rate, taking the top three spots.

Fun fact
Advertiser awareness is high in other countries as well. In Canada, 85% of respondents can identify the advertiser. In all other countries in the study, recipients were able to recall the advertiser on a promotional item about 80% of the time.

Key Takeaways
• Distributors who have clients looking to get their company or brand’s name in the marketplace have a compelling reason to suggest advertising specialties as a marketing solution: Promotional product recipients clearly remember the advertisers on the items they receive.
• The more interaction recipients of promotional items have with the item, the higher the recognition of the advertiser. This explains in part why wearables lead the way with advertiser recall. Further, a higher perceived value of the product, such as that obtained with outerwear, increases advertiser recognition even more. Distributors looking to present clients with an item of high perceived value that has high advertiser recognition might consider higher-end wearables as an option.

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Swaying Opinions

In this section, we also asked consumers their opinions of advertisers who gave them a logoed item. Over one-half (53%) of the time, ad specialties leave a more favorable impression of the advertiser. This trend was seen across all countries.

Outerwear leaves the most positive attitude about the advertiser, as three-quarters (75%) of branded outerwear recipients had a more favorable impression of the advertiser.

Positive attitudes about the advertiser are correlated with advertiser recall. Once again, the top three products generating positive feelings are also the most likely to have advertiser recall.

An exception to that rule is health and safety products, which have a lower advertiser recollection but generate favorable impressions about the advertiser.

趣闻小知识
Italians were even more likely to feel favorable towards the advertiser, with nearly two-thirds (64%) of those in Rome citing a more positive view, by far the most of any group.

### Key Takeaway
All categories of promotional products generate favorable impressions of the advertisers as a whole. Steps should be taken when presenting recipients with items that are seen as more of a commodity (like writing instruments) to reinforce the advertiser connection with the item.

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Ad Specialties Generate New Business

When consumers were asked how likely they were to do business with an advertiser they hadn’t previously done business with after receiving an item, over one-third (36%) said they were more likely to do business with them in the future.

Fun fact
Perhaps in part because of the good will generated by ad specialties in Rome, Italians were also the most likely to cite a positive likelihood for doing new business, as nearly one-half (48%) thought they would be more likely to do business with the advertiser. Further, 17% thought it very likely, twice that of any other area.

Some items generate even more goodwill from consumers: For example, about 48% of recipients of logoed outerwear said they’d be more likely to do business with an advertiser; recipients of bags were 43% more likely to do business with an advertiser; and USB recipients were 39% more likely.

Key Takeaway
A goal of advertising is to get the prospect more likely to buy from the advertiser. This is often done in incremental amounts. Even the lowest-scoring ad specialty (health and safety) still manages to get nearly one-quarter of recipients to feel more likely to do business with the advertiser in the future.
Location of Promotional Products

Consumers were asked about the location of the logoed items they’d received. Overall, the office was cited most often (41%), but only marginally more than at home (36%).

Wearables, bags and health and safety products were most likely to be at home, while desk accessories, calendars, writing instruments and USB drives were most likely in the office.

<table>
<thead>
<tr>
<th>Item</th>
<th>Home</th>
<th>Office</th>
<th>On Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shirts</td>
<td>47%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Caps/headwear</td>
<td>40%</td>
<td>35%</td>
<td>25%</td>
</tr>
<tr>
<td>Bags</td>
<td>40%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>Health and safety products</td>
<td>40%</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Drinkware</td>
<td>39%</td>
<td>39%</td>
<td>23%</td>
</tr>
<tr>
<td>Outerwear</td>
<td>35%</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>Calendars</td>
<td>35%</td>
<td>51%</td>
<td>14%</td>
</tr>
<tr>
<td>USB drives/flash drives</td>
<td>30%</td>
<td>50%</td>
<td>19%</td>
</tr>
<tr>
<td>Writing instruments</td>
<td>27%</td>
<td>50%</td>
<td>23%</td>
</tr>
<tr>
<td>Desk/office accessories</td>
<td>25%</td>
<td>59%</td>
<td>16%</td>
</tr>
<tr>
<td>Overall</td>
<td>36%</td>
<td>41%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Some geographic areas have a higher propensity to have items at home. For example, nearly one-half (48%) of recipients in Madrid reported the items were kept in the home.

Key Takeaway

When choosing promotional products, the end-buyer needs to consider where the item will ultimately be used. The office isn’t necessarily a given, especially for items like shirts, caps and bags.
Section Three
Promotional Products Make an Impression

For this section, the average number of impressions each promotional product receives was calculated. The number of impressions a product makes was derived from multiplying how long a recipient has the product to how many people he comes into contact with each month while using it.

In the U.S., we again saw that bags generated the most impressions (5,983) of any item in the study. That’s because bags are frequently used, often in public places where they can be seen by many people. Other items that deliver extremely high numbers of impressions in the U.S. include writing instruments, caps, outerwear, calendars and shirts.

The accompanying charts illustrate the top five products, by country, that deliver the most impressions:

**The Most Impressions in the U.S.**

- Bags: 5,983 impressions
- Writing instruments: 3,134 impressions
- Outerwear: 2,999 impressions
- Shirts: 2,288 impressions
- Caps: 2,167 impressions

In the U.S., bags generate the most impressions by far.

**The Most Impressions in Canada**

- Bags: 4,724 impressions
- Writing instruments: 3,634 impressions
- Outerwear: 2,943 impressions
- Shirts: 2,805 impressions
- Caps: 2,253 impressions

In Canada, bags also generate the most impressions.

**The Most Impressions in London**

- Writing instruments: 5,125 impressions
- Outerwear: 4,066 impressions
- Calendars: 3,449 impressions
- November: 2,323 impressions
- Shirts: 1,852 impressions

Though the incidence of owning promotional outerwear items is low, they generate the most impressions.

**The Most Impressions in Paris**

- Writing instruments: 3,473 impressions
- Outerwear: 2,665 impressions
- Calendars: 2,372 impressions
- November: 1,700 impressions
- Shirts: 1,204 impressions

Similar to London, the incidence of owning promotional outerwear is low, but a high number of impressions are generated.
Key Takeaway
While the exact ranking of impressions changes somewhat from location to location, the overall list of products generating the most impressions is consistent. Wearables consistently deliver a high number of impressions, and in the U.S., bags deliver the most impressions every year. Items that create the fewest impressions tend to be those intended mostly for one person, such as health and safety items and USB drives. The value of these items is more in the connection they make with the user than the total number of impressions generated.

Distributors should work with clients to determine the goals of their campaigns and the connection they want to establish with the intended recipient before selecting the right vehicle to deliver their message. Taking into account the number and quality of the impressions generated, in addition to some of the demographic considerations shown earlier in the report, gives the distributor the opportunity to serve as a consultant rather than an order taker.
The Cost-Effectiveness of Ad Specialties

Advertising specialties are less expensive per impression than most other forms of media. The investment in ad specialties is modest, more targeted and more achievable for smaller businesses than other forms of advertising.

As the chart on this page illustrates, promotional products have a lower cost-per-impression in the United States than prime-time television advertising, national magazine advertising and newspaper ads, and a similar CPI to spot radio and Internet advertising.

However, a report published in October, 2012 by Forrester Research, “U.S. Online Display Ad Spend $12.7B in 2012,” sheds some light on Internet advertising. It points out that CPMs are actually on the rise. The average CPM — cost per thousand impressions — for 2012 was $3.17, but by 2017 that will rise to $6.64, largely because of the shift to real-time bidding and away from portal buys where placement is not guaranteed. The rise, the analysts note, is also a supply and demand issue: marketers are competing for similar audience segments and bid density is continuing to increase.

The cost of advertising specialties are not expected to increase markedly in the next four years, making them an even better comparison to other forms of media advertising such as the Internet.

Key Takeaway
Promotional products deliver the same or better ROI than most other forms of media, without the interruption inherent with other forms of advertising. And when one considers the prohibitive cost of producing radio or television commercials or the cash outlay to buy sufficient Internet advertising, promotional products offer the best value. Promotional products can also be used to more closely target the intended message recipient than mass media.

Further, even smaller companies can achieve as high an ROI as major corporations by using advertising specialties because even a modest investment delivers superior results.

For More Information
To gain access to the full study data, plus downloadable PDFs of the charts in this study, visit www.asicentral.com/study.
**Demographics**

The following is a breakdown of the demographics of all survey respondents who indicated they currently owned promotional products.

<table>
<thead>
<tr>
<th>Gender</th>
<th>%</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>47%</td>
<td>1,416</td>
</tr>
<tr>
<td>Female</td>
<td>53%</td>
<td>1,616</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>3,032</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>%</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>21 to 34 years</td>
<td>46%</td>
<td>1,482</td>
</tr>
<tr>
<td>35 to 44 years</td>
<td>23%</td>
<td>744</td>
</tr>
<tr>
<td>45 to 54 years</td>
<td>18%</td>
<td>576</td>
</tr>
<tr>
<td>55 to 64 years</td>
<td>10%</td>
<td>320</td>
</tr>
<tr>
<td>65 years and over</td>
<td>2%</td>
<td>79</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>3,201</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ethnicity (U.S.)</th>
<th>%</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian</td>
<td>11%</td>
<td>297</td>
</tr>
<tr>
<td>Black or African American</td>
<td>9%</td>
<td>245</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>8%</td>
<td>207</td>
</tr>
<tr>
<td>White</td>
<td>68%</td>
<td>1,779</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>101</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>2,629</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Political Affiliation (U.S.)</th>
<th>%</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Democrat</td>
<td>42%</td>
<td>741</td>
</tr>
<tr>
<td>Republican</td>
<td>25%</td>
<td>438</td>
</tr>
<tr>
<td>Independent</td>
<td>19%</td>
<td>331</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>57</td>
</tr>
<tr>
<td>Not Registered</td>
<td>12%</td>
<td>217</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>1,784</strong></td>
</tr>
</tbody>
</table>
## Demographics continued

<table>
<thead>
<tr>
<th>Country</th>
<th>%</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>58%</td>
<td>1,874</td>
</tr>
<tr>
<td>Germany</td>
<td>5%</td>
<td>153</td>
</tr>
<tr>
<td>Australia</td>
<td>4%</td>
<td>144</td>
</tr>
<tr>
<td>Spain</td>
<td>5%</td>
<td>157</td>
</tr>
<tr>
<td>Italy</td>
<td>4%</td>
<td>131</td>
</tr>
<tr>
<td>Canada</td>
<td>14%</td>
<td>453</td>
</tr>
<tr>
<td>Great Britain</td>
<td>5%</td>
<td>152</td>
</tr>
<tr>
<td>France</td>
<td>4%</td>
<td>126</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>24</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>3,214</strong></td>
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</table>

<table>
<thead>
<tr>
<th>U.S. Cities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta</td>
<td>9%</td>
<td>165</td>
</tr>
<tr>
<td>Boston</td>
<td>9%</td>
<td>155</td>
</tr>
<tr>
<td>Chicago</td>
<td>7%</td>
<td>116</td>
</tr>
<tr>
<td>Dallas</td>
<td>8%</td>
<td>142</td>
</tr>
<tr>
<td>Houston</td>
<td>9%</td>
<td>153</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>8%</td>
<td>141</td>
</tr>
<tr>
<td>Miami</td>
<td>9%</td>
<td>155</td>
</tr>
<tr>
<td>New York</td>
<td>9%</td>
<td>153</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>7%</td>
<td>131</td>
</tr>
<tr>
<td>Phoenix</td>
<td>8%</td>
<td>151</td>
</tr>
<tr>
<td>San Francisco</td>
<td>8%</td>
<td>151</td>
</tr>
<tr>
<td>Seattle</td>
<td>10%</td>
<td>171</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>1,784</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Canadian Cities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Montreal</td>
<td>33%</td>
<td>151</td>
</tr>
<tr>
<td>Toronto</td>
<td>32%</td>
<td>147</td>
</tr>
<tr>
<td>Vancouver</td>
<td>35%</td>
<td>160</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>458</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>European Cities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Düsseldorf/Berlin</td>
<td>21%</td>
<td>153</td>
</tr>
<tr>
<td>London</td>
<td>21%</td>
<td>150</td>
</tr>
<tr>
<td>Madrid</td>
<td>22%</td>
<td>157</td>
</tr>
<tr>
<td>Paris</td>
<td>19%</td>
<td>135</td>
</tr>
<tr>
<td>Rome</td>
<td>18%</td>
<td>131</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>726</strong></td>
</tr>
</tbody>
</table>

| Sydney           | 100%| 144   |