

# GLOBAL ADVERTISING SPECIALTIES IMPRESSIONS STUDY

## 2014 EDITION

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

*Released at the 2014 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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GLOBAL ADVERTISING SPECIALTIES IMPRESSIONS STUDY
V.4

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# Methodology

**The ASI Ad Impressions Study** was first launched in 2006 by ASI's research team to give our members powerful data that proves what we already knew – that **advertising specialties are one of the most high-impact, cost-effective advertising mediums around.**

Thousands of in-person and online interviews have been conducted with businesspeople and students in key cities across North America, Canada, Europe and Australia. These interviews have been used to gauge the reach of these products, consumer's perceptions of promotional products, their influence on buying decisions and their influence on the perception of the advertiser.

*Methodology:* This report updates the prior years' reports by expanding our interviews into two cities in Mexico (Monterrey and Mexico City) and several additional U.S. cities, which represent mid-major markets (Tampa, Charlotte, Minneapolis, Denver, San Diego). 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 perceptions about the advertisers that gave them the items.

Results from prior ASI Ad Impressions studies have been incorporated into this report so that additional metro areas, both in the United States and abroad, could be included in the analysis.

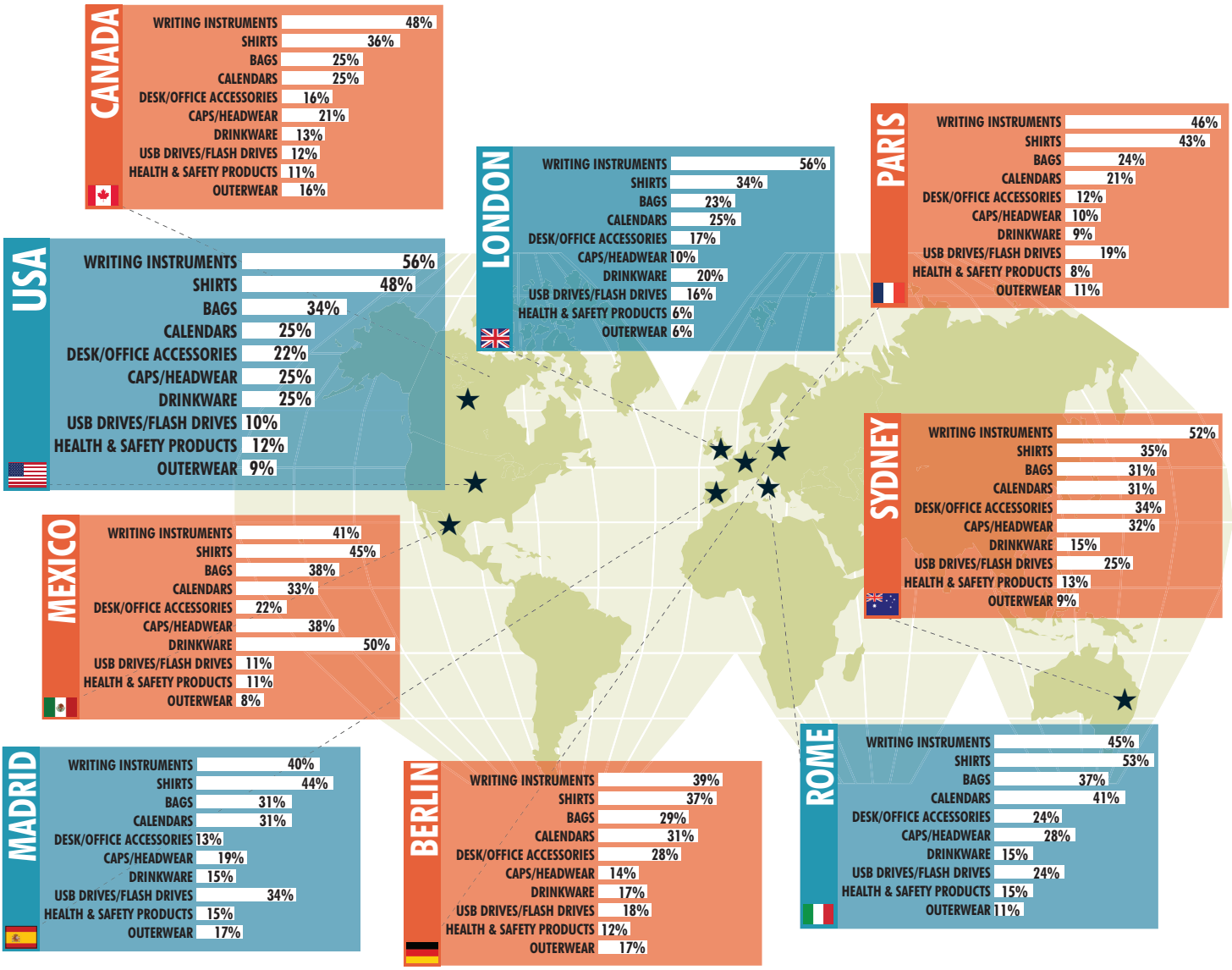



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# Product Popularity

For this section, **respondents were asked to rate 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 more then one-half (56%) of promotional product recipients in the U.S. reported getting at least one in the prior 12 months, followed by shirts (48%) and bags (34%).



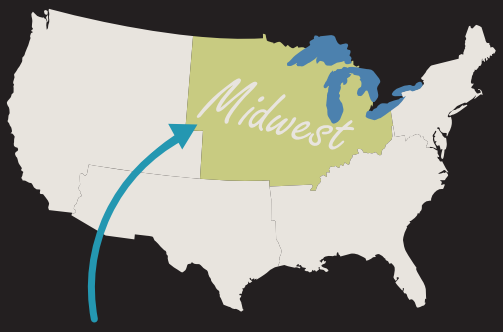

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# Product Spotlight: Writing Instruments

## 56% OF U.S. CONSUMERS OWN LOGOED WRITING INSTRUMENTS




## Midwesterners have a lot to write about.



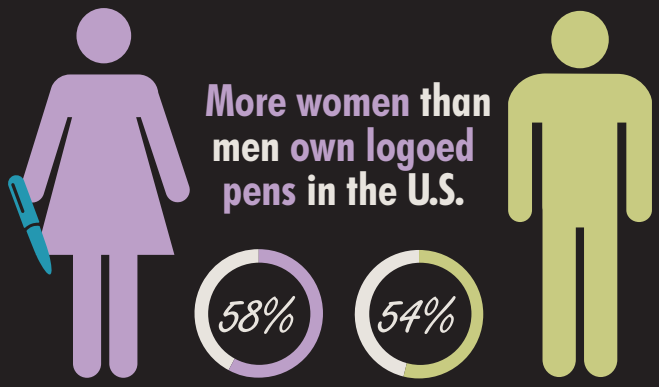

**68% of consumers in the Midwest own a logoed pen**, well above the U.S. average.

## Tampa Consumers can't keep their pens in their pockets.

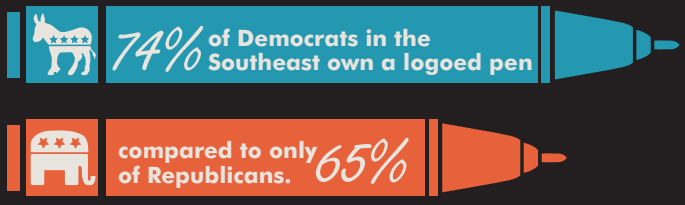


On average, **a logoed pen is used 3 to 4 times per day** for its lifetime.

## More women than men own logoed pens in the U.S.




## Democrats in the Southeast are prepared for write-in candidates.




## 1/10th of a cent



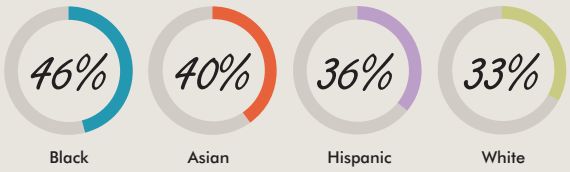

## Pens + Impressions = Best Value

**The cost per impression** is less than 1/10th of a cent in the United States.

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# Product Spotlight: Shirts

**African American consumers are much more likely to keep their shirts** because they are attractive, compared with other groups.

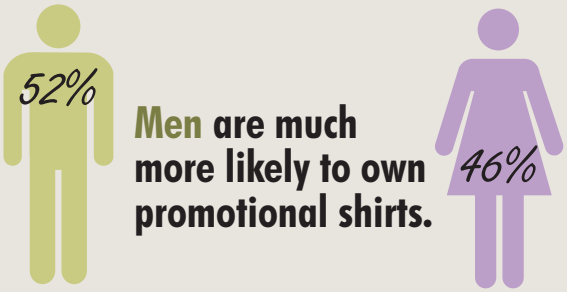






## Germans wear them well.

On average, Germans report **wearing their logoed shirts at least once a week.**




## Men are much more likely to own promotional shirts.

## Branded shirts: swaying opinions, influencing people




**of U.S. consumers** feel more favorable about the advertiser who gave them a promotional shirt.

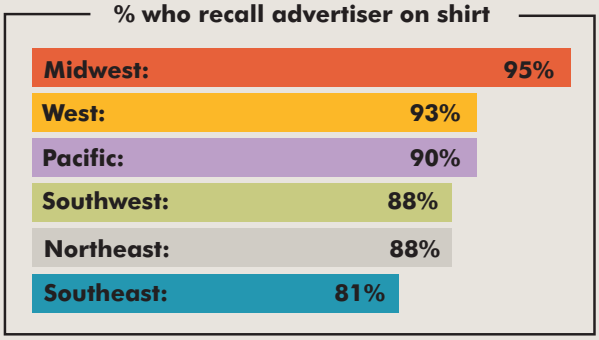



## Shirts in the Southeast score big.




**Promotional shirts in the Southeast** generate nearly 4,000 impressions.

## Consumers know who gave them their promotional shirt, especially in the Midwest region.

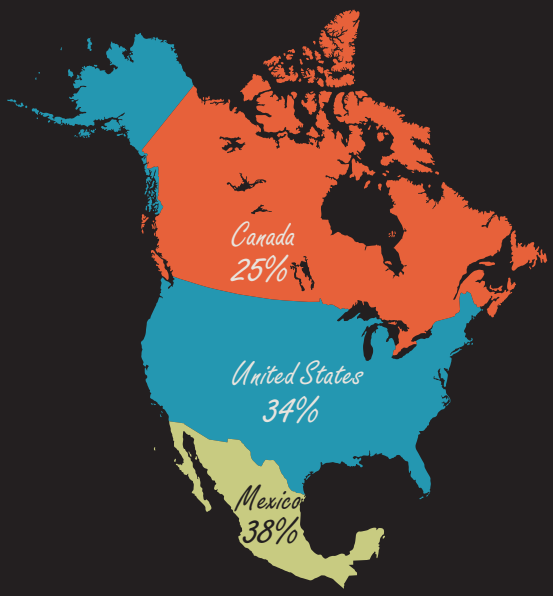



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# Product Spotlight: Bags

## 34% OF U.S. CONSUMERS OWN LOGOED BAGS

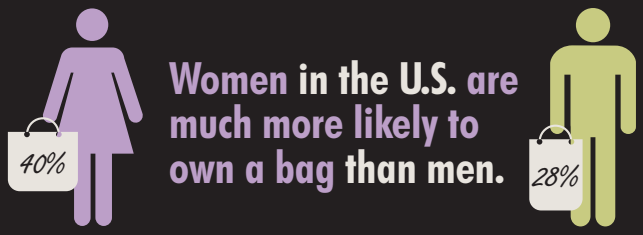
## ¡Viva la Bags!




**Mexico wins!** 38% of people in Mexico own a promotional bag.

**Bags generate more impressions in the U.S. than any other promotional item.**

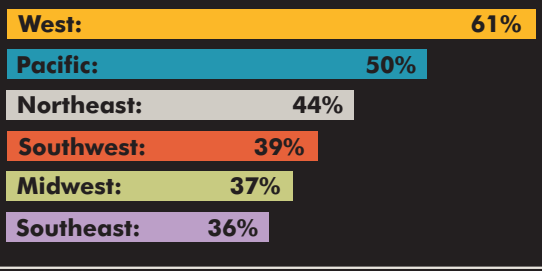
5,700+




**Women in the U.S. are much more likely to own a bag than men.**

## Need to grow your business in the West? Think promotional bags.

**61% of consumers in the West** who have a logoed bag say they **are more likely to do business with the advertiser.**






## Staying Power = 24 months

More than half of **consumers in San Diego who receive a promotional bag** report that they **keep it for 2 years or longer.**

## Down under, bags get the most impressions.



The only location that has more impressions per bag than the U.S. is **Sydney, with over 5,800 per promo bag.**

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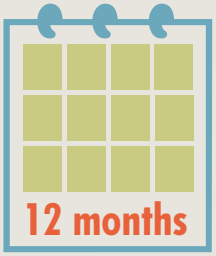
# Product Spotlight: Calendars



## When in Rome...

In Rome, **calendars generate the second-greatest number of impressions**, behind writing instruments.

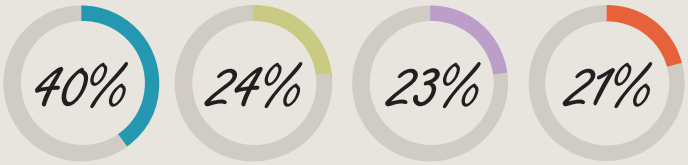
**2,125 Impressions**

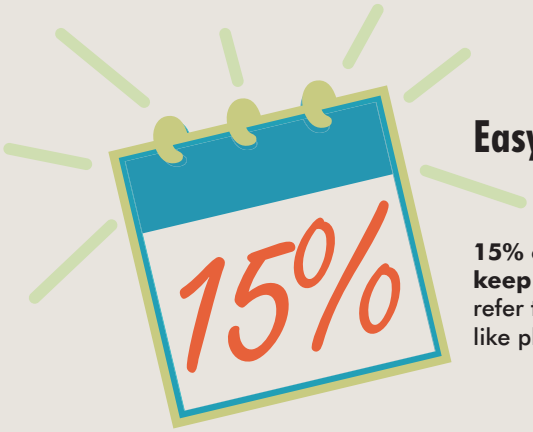



## A Year's Worth of Branding

On average, consumers report **keeping promotional calendars for about 12 months.**

**40% of African Americans own a promotional calendar**, the highest percentage of any racial demographic.

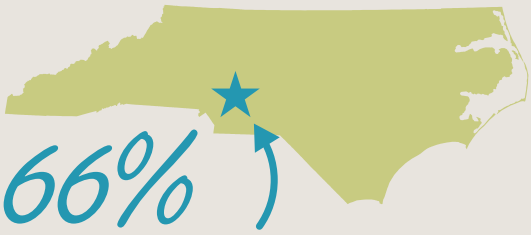



## Easy Reference

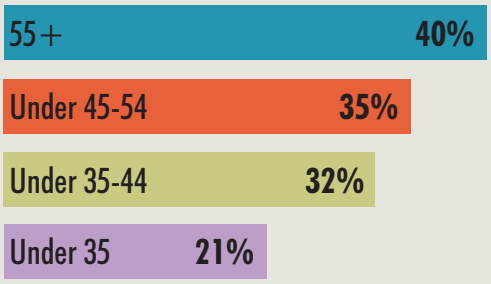
**15%** of consumers **keep a calendar** to refer to information like phone numbers.

**25% OF U.S. CONSUMERS OWN LOGOED CALENDARS**




**of consumers in Charlotte say they are more likely to do business with an advertiser that gives them a calendar.** This is the highest percentage of any U.S. city.

## Older and Wiser



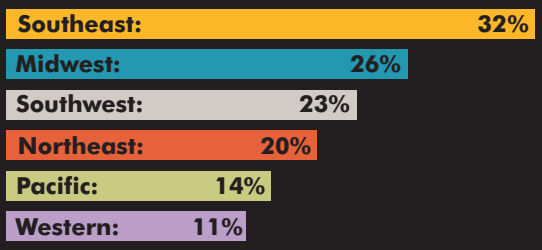

Older Americans **are more likely to own promotional calendars.**

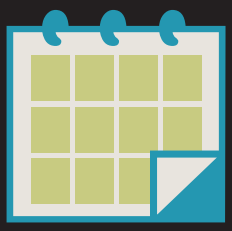
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# Product Spotlight: Desk Accessories

## 22% OF U.S. CONSUMERS OWN LOGOED DESK/OFFICE ACCESSORIES

**32% of consumers in the Southeast own a branded desk accessory, the highest of any region.**



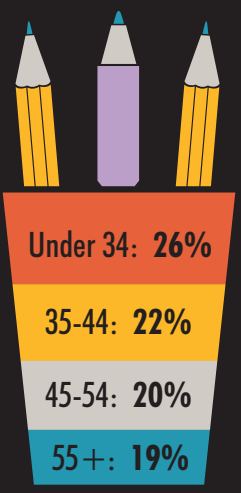
**14 months**

### More Than a Year

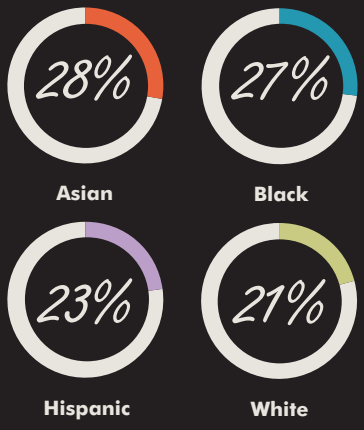
**Consumers who own a promotional desk accessory** report they typically will keep it for about 14 months.

### Millennials ♥ logoed desk accessories

**Younger consumers are the most likely** to own a promotional desk accessory.




**Asian Americans are most likely** to own a logoed desk accessory.




### Desk accessories make their impressions in the office.

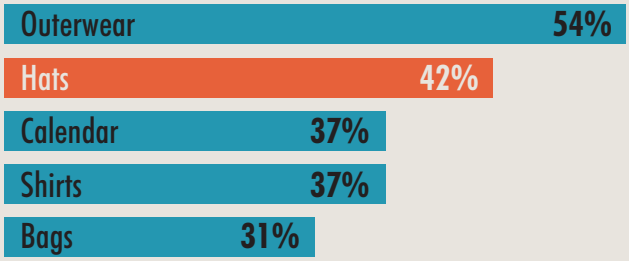



**61% of desk accessories** are kept at the workplace.

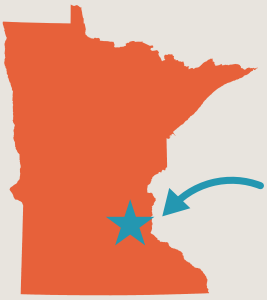
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# Product Spotlight: Caps/Headwear

## Hats need to look good!




**42% of U.S. consumers who keep promotional hats** do so because they are attractive, second only to outerwear.

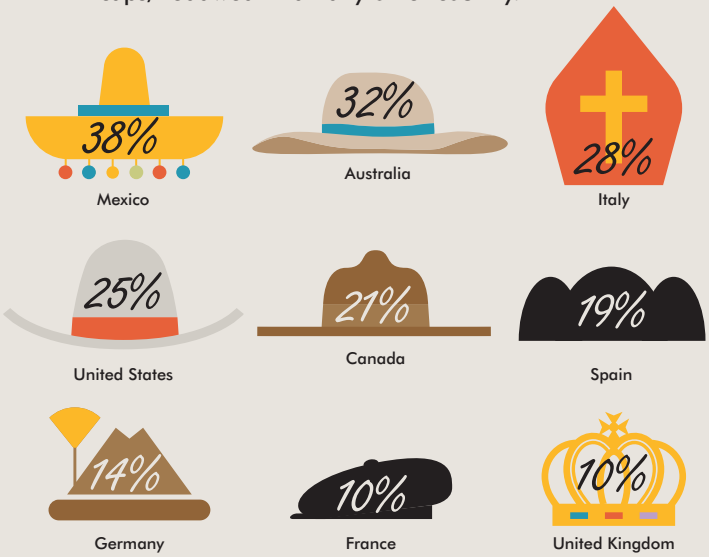


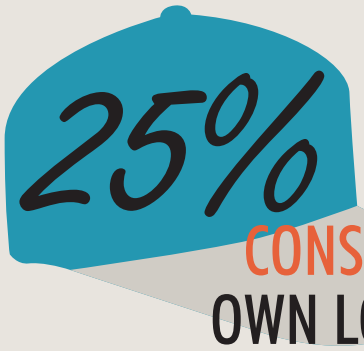
## 6x a month

The number of times a month **Minneapolis consumers who own logoed hats** wear them.

## Mexico is the leader

**Consumers in Mexico are more likely** to own caps/headwear than any other country.




## OF U.S. CONSUMERS OWN LOGOED CAPS/HEADWEAR

## Men come out on top.




In the Midwest, **men are more than twice as likely to own promotional headwear** as women are.




**The** number of impressions that caps make over their lifetime **in the U.S.**

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# Product Spotlight: Drinkware

## 25% OF U.S. CONSUMERS OWN LOGOED DRINKWARE

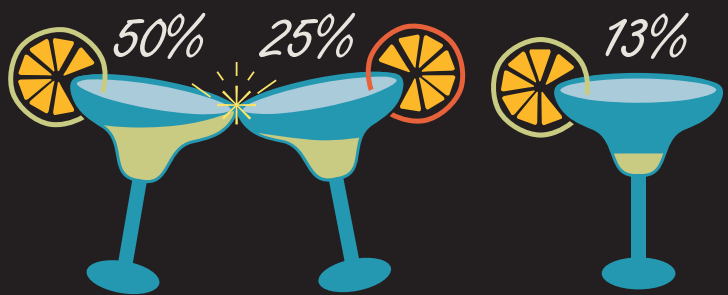
### 35% of Minneapolis consumers keep it in their office.

Of all the metro areas surveyed, **Minneapolis residents were most likely to keep their drinkware at the office.**

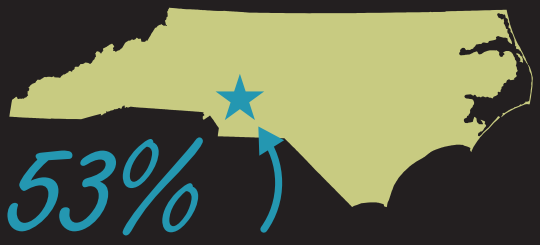


### ¡Salud!

**50% of Mexican consumers own promotional drinkware,** the highest percentage in North America.




### Looking good in Tarheel country



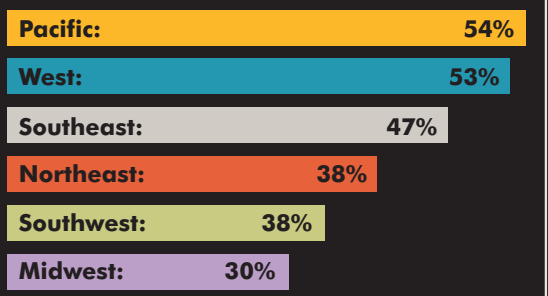

**53% of consumers who own drinkware in Charlotte keep it because it is attractive,** the highest percentage in the U.S.



### Bottoms up!

**Half of U.S. consumers who own logoed drinkware** use it 2-3 times a week or more.

More than half of the consumers in the West and Pacific regions report **they are more likely to do business with the advertiser on their drinkware.**




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# Product Spotlight: USB Drives

## In Madrid, USB drives are everywhere.



**34% of Madrid residents own a promo USB drive,** the highest of any area measured.

## Utility is Key

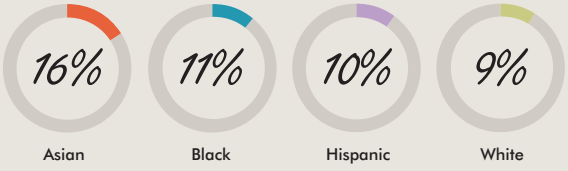


In the U.S., **7% keep USB drives** because they are attractive.



In the U.S., **91% keep USB drives** because they are useful.

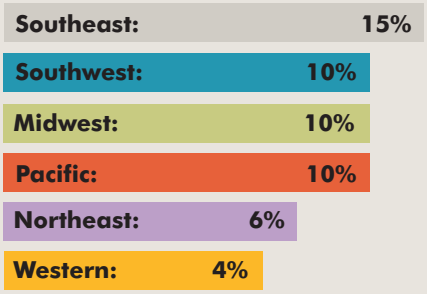
In the U.S., **Asian consumers are the most likely to own a USB drive.**



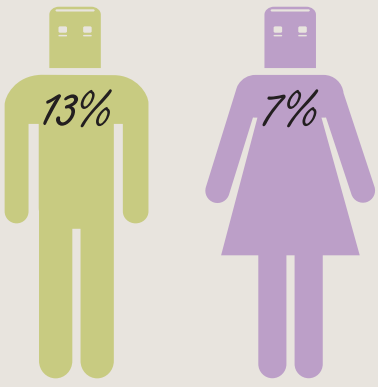

## 10% OF U.S. CONSUMERS OWN LOGOED USB DRIVES



## Consumers in the Southeast are most likely to own a USB drive.




## Men are more likely to own a branded USB drive.




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# Product Spotlight: Health & Safety Items

## 12% OF U.S. CONSUMERS OWN LOGOED HEALTH AND SAFETY ITEMS




**20% of consumers in the Southeast own a promotional health and safety product,** the highest of any region or country.



## Have health and safety product, will travel

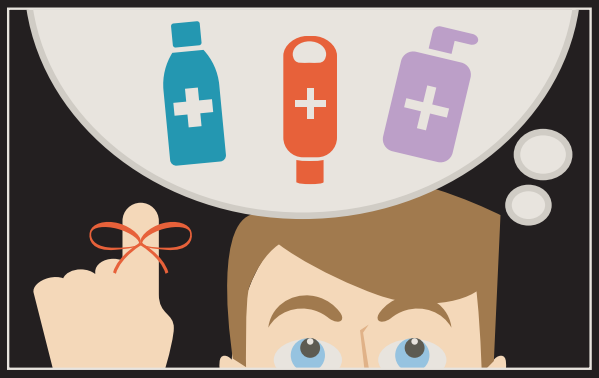
**27% of U.S. consumers who own a health and safety product** report they carry it with them.

## Health and safety products drive positive opinions.

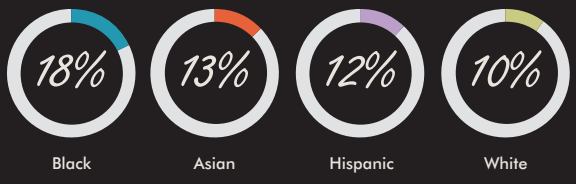



## The Northeast doesn't forget

**84% of consumers in the Northeast remember** the advertiser on the health and safety product.



**African Americans** own the most health and safety products.




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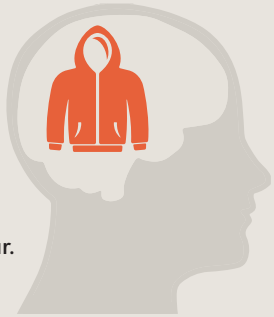
# Product Spotlight: Outerwear




**Men own more promotional outerwear than women.**

## Outerwear is Remembered

**85% of U.S. consumers remember** the advertiser who gave them the outerwear.



## Outerwear Has Staying Power




On average, **U.S. consumers report keeping outerwear for a year and a half.**

## Outerwear is kept for a variety of reasons.

Reasons for keeping promo outerwear:

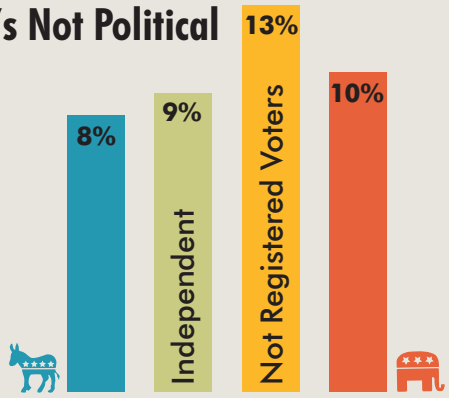



Useful | Attractive | Enjoyable to Have

## 9% OF U.S. CONSUMERS OWN PROMOTIONAL OUTERWEAR



## It's Not Political




They may not belong to a party, but **they have logoed outerwear.**

## Midwesterners are prepared for the cold weather.

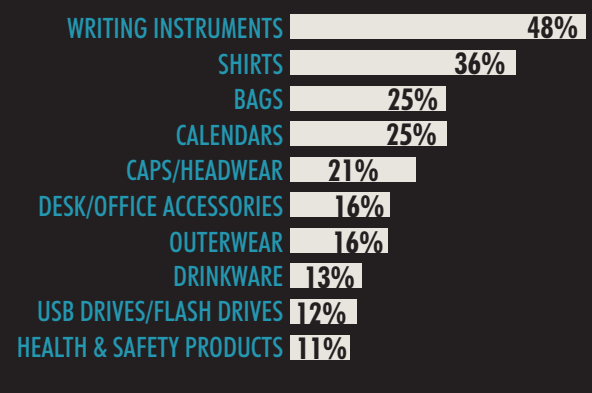



Ownership of logoed outerwear is highest in the Midwest, with 15% owning an item.

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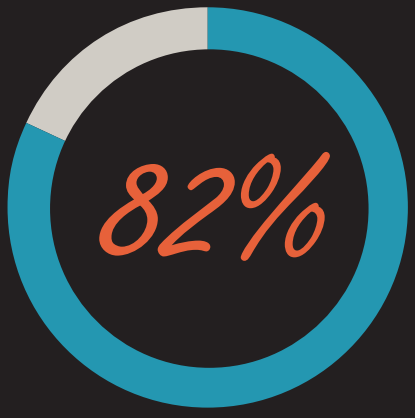
# Spotlight on Canada

## CANADA






**More than 90% of Canadians** who own promotional outerwear, hats, drinkware and bags remember the advertiser.




**82% of Canadians keep advertising specialities** because they are useful, the highest percentage of any country.

## In the North, we look out for each other.




Canadian consumers are the **most likely to give items they don't want to others.**

## Close to my heart, and my head



More than 60% of Candians who own promotional headwear **think more favorably of the advertiser who gave it to them.**



**4,700**

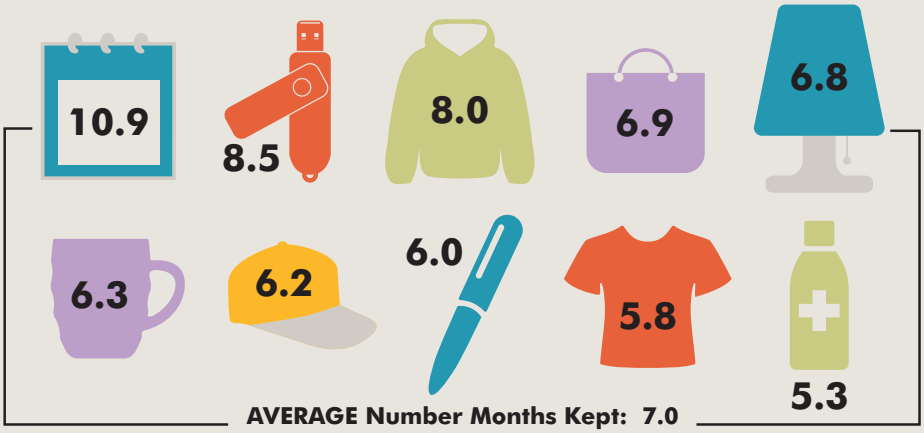
Bags in Canada **generate the most impressions.**

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# Spotlight on Europe

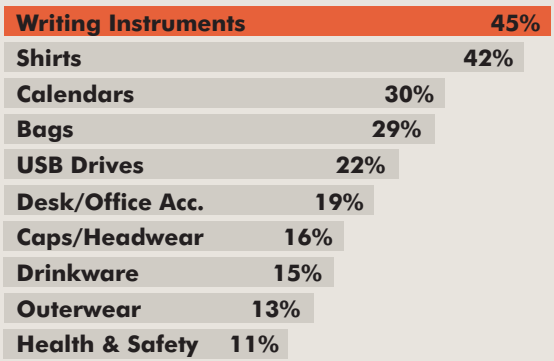
## Promo products in Europe have a long life.

Calendars, USB drives and outerwear are kept by European consumers for an average of eight months or longer.

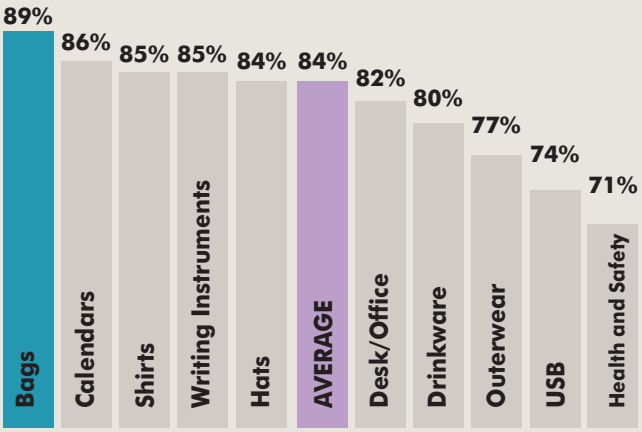



## More than four in 10 European consumers own a logoed writing instrument or shirt.

**Product Ownership in Europe**




## Nearly nine in 10 European consumers who own a promotional bag remember who gave it to them.




## Reason for Keeping Products: Europe

**To Europeans, the usefulness of a logoed product is the most important reason for keeping it.**




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# Spotlight on Mexico

## For the first time,




ASI interviewed businesspeople and students in two cities in Mexico: Monterrey and Mexico City. **In each city, a total of 150 interviews were completed, for a total of 300 interviews.**

## Apparel makes an impression in Mexico



**Hats: 2,882 impressions**



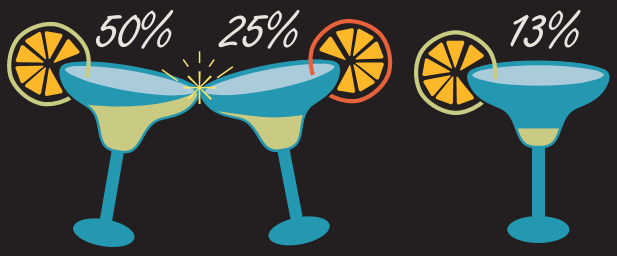
**Shirts: 2,498 impressions**



**Outerwear: 2,208 impressions**

## ¡Salud!

**Mexican consumers are nearly four times as likely to own promotional drinkware** as our neighbors to the North. **50% of Mexican consumers own promotional drinkware.**




Mexico | United States | Canada

## To share or not to share, that is the question.



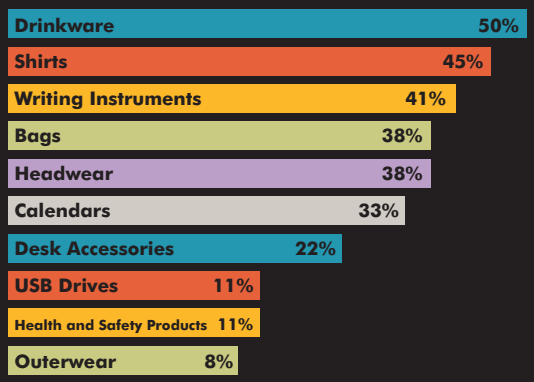

**In Mexico, consumers are more likely to throw away items** they don't want than give them away.

## Mexico Remembers



**Nearly 90% of Mexican consumers who own a promotional shirt remember the advertiser,** among the highest percentages of any category in any country.

**% of consumers who own**




## ¡Viva la Bags!

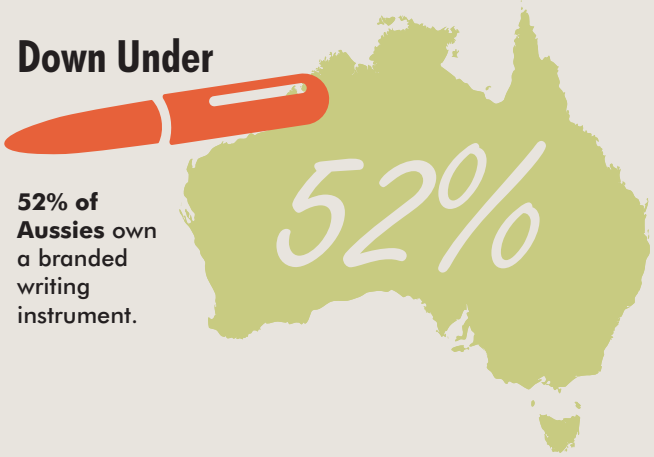



**Mexico wins!** 38% of people in Mexico own a promotional bag.

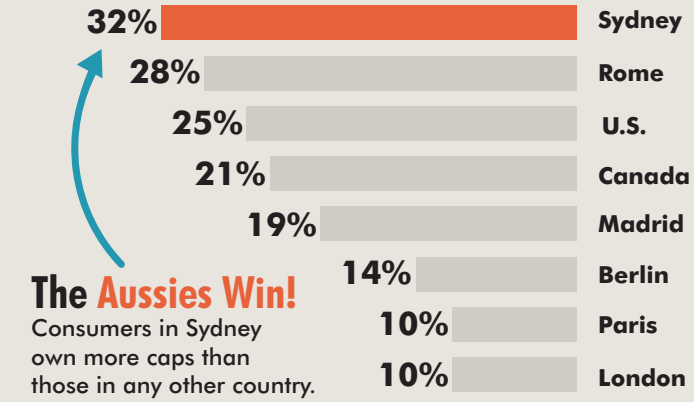
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# Spotlight on Australia

## Down Under




**52% of Aussies** own a branded writing instrument.




## The Aussies Win!

Consumers in Sydney own more caps than those in any other country.

## Down under, bags get the most impressions.

The only location that has more impressions per bag than the U.S. is **Sydney, with over 5,800 per logoed bag.**



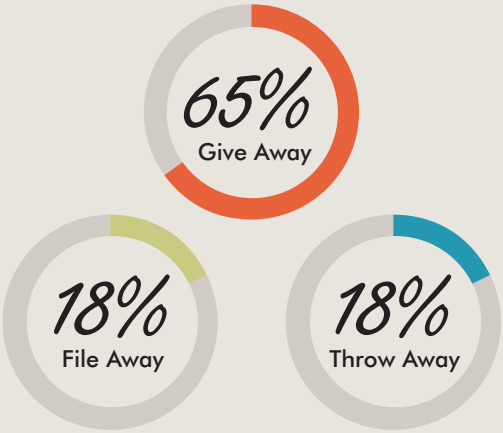


## Nearly one-third of Australian consumers own a promo hat.

## 34% of Australian residents adorn their desks with pen sets, logoed phone chargers, business card holders and the like.



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




**Australians are very likely to give a promotional** item they don't want to someone else.

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# Spotlight on New Cities: Key Facts

## Denver

- **90% of Denver consumers who own a promotional calendar** refer to it twice a week or more.
- **84% of businesspeople in Denver remember the advertiser** who gave them a logoed product.
- More than **nine in 10 Denver residents report that they keep promotional products** because they find them useful.



## Charlotte



- Nearly two-thirds of **Charlotte consumers report owning a promotional hat.**
- 66% of Charlotte consumers who own a promotional calendar **are more likely to do business with the advertiser.**
- More than one-half of **Charlotte consumers** who own logoed drinkware **keep it because it is attractive.**

## San Diego



- **More than one-half of those who own a promotional bag** report they keep it for 2 years or longer.
- **Consumers in San Diego own the fewest promotional products** of all cities measured in the U.S.
- **San Diegans** who own promotional drinkware **keep it for over a year and a half**, the longest of any U.S. City.

## Tampa



- **Tampa consumers** who **own promotional bags** report using them more than once a week.
- **Tampa residents own**, on average, **12 promotional items**, second only to Minneapolis.
- More than one-quarter of **Tampa consumers report owning a promotional USB drive.**

## Minneapolis

- **Consumers in Minneapolis own an average of 13 promotional products**, the highest of any city measured.
- More than one-half of **consumers in Minneapolis report owning a promotional hat,** and they wear it about six times a month.
- **Minneapolis residents were most likely to keep their logoed drinkware at their office.**

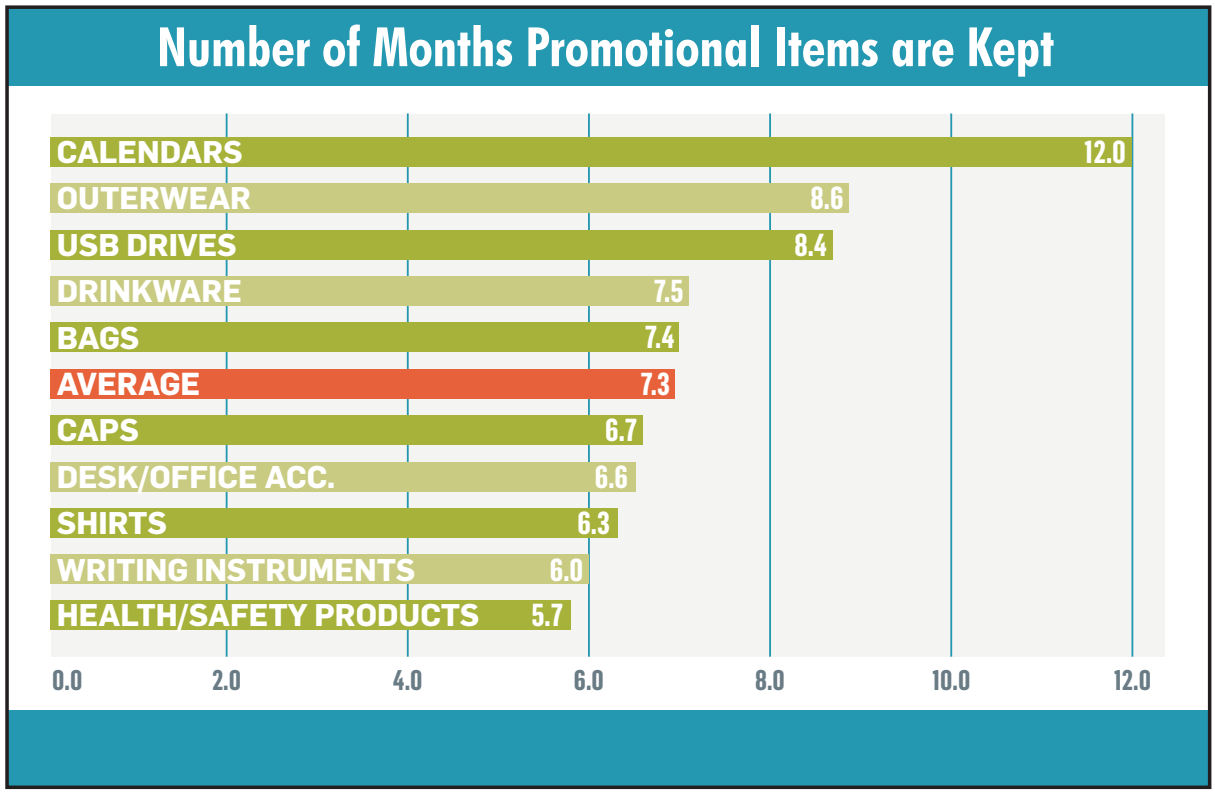


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# Staying Power

## Promotional Products Don't Fade Away

**Respondents were asked how long they keep a typical type of promotional item.** Across all promotional products, the average was just over seven months. Some products such as calendars can stay around for about a year, while others, especially health and safety products and writing instruments, last for about six months. Calendars, which have the longest staying power, are the one item used most often for reference purposes, such as referring to a name or phone number.




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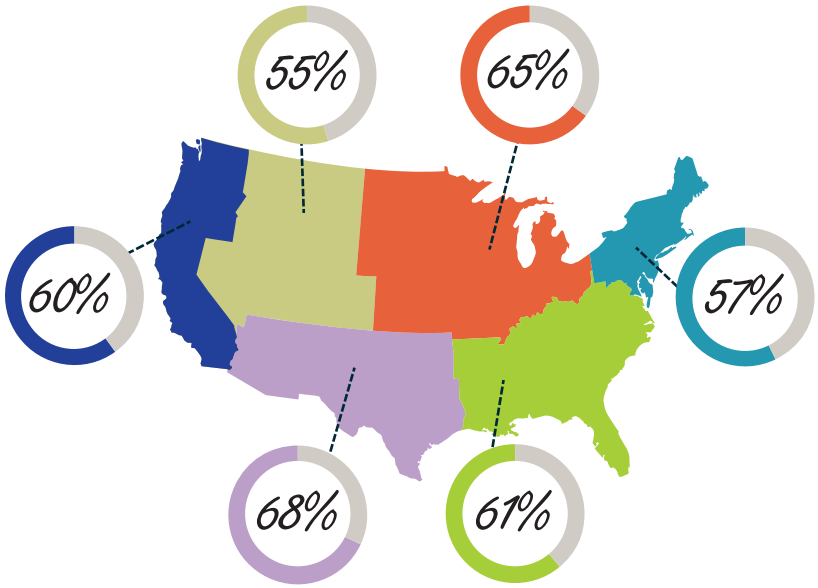
# Promo Products are Passed Along

**Consumers who receive ad specialty products will typically give them to someone else when they are finished with them**, thus furthering the advertiser's reach. In the U.S. and Canada, nearly two-thirds of ad specialties that are not wanted are given away. In fact, in most countries, more than half of consumers report that they will give away a product that they are finished with rather then throw it out or file it away.

**Promotional products are passed along when recipients are finished with them, except for those in Mexico, where they are much more likely to be thrown away.**

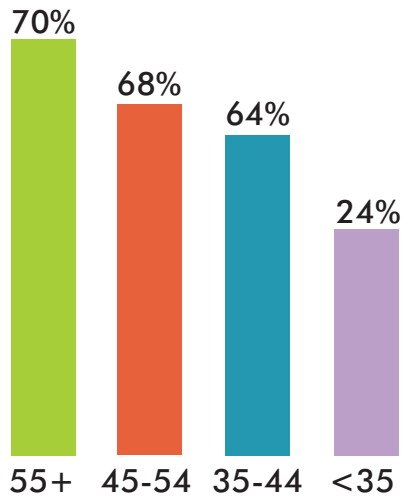
| Areas Interviewed | United States | Canada | London | Paris | Berlin | Rome | Madrid | Sydney | Mexico |
|---|---|---|---|---|---|---|---|---|---|
| Throw it away | 20% | 18% | 15% | 21% | 28% | 23% | 22% | 18% | 42% |
| File the item away | 17% | 18% | 18% | 21% | 16% | 29% | 24% | 18% | 20% |
| Give the item to someone else | 63% | 64% | 67% | 59% | 56% | 48% | 54% | 64% | 38% |

## Consumers in the Southwest are the Most Likely to Give Away a Product They are Finished With




Percent Who Give Items Away to Someone Else

## Younger Consumers Are Less Likely to Give Away an Item Than are Older Consumers




Percent of consumers who give away a promo item they're finished with

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# Usefulness is Key

**Consumers want products that are, first and foremost, useful to them**, especially when it comes to the more practical items such as writing instruments and USB drives. Here, usefulness outweighs attractivess by at least five to one. However, that's not to say that attractiveness isn't important, especially if the item needs to be worn. For outerwear, attractiveness is a very close second to usefulness in reasons for keeping the product, with more than half of those who own outerwear reporting they keep it becuase it is attractive. If you want a customer to use the product for reference, then calendars are the way to go. Apparel items, whether they be shirts, outerwear or hats, are cited as the most enjoyable to have.

## Reasons for Keeping Products: U.S.

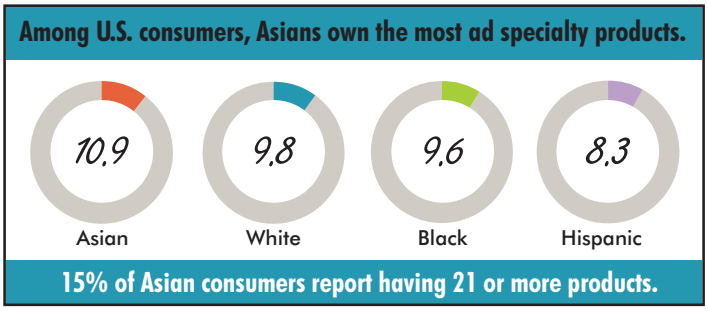
| | Useful | Attractive | Enjoyable to Have | Point of Reference |
|---|---|---|---|---|
| Bags | 87% | 31% | 23% | 3% |
| Calendars | 88% | 37% | 23% | 13% |
| Drinkware | 84% | 27% | 30% | 2% |
| Hats | 65% | 42% | 36% | 3% |
| Health/Safety | 84% | 11% | 16% | 4% |
| Desk/Office | 85% | 20% | 20% | 7% |
| Outerwear | 75% | 54% | 49% | 5% |
| Shirts | 70% | 37% | 33% | 2% |
| USB Drives | 91% | 7% | 18% | 4% |
| Writing Instruments | 93% | 17% | 16% | 7% |
| Average | 82% | 29% | **26%** | **5%** |

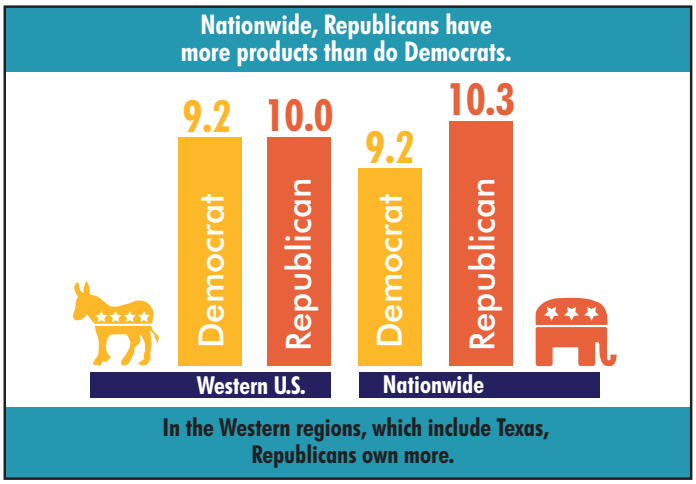
| Areas Interviewed | United States | Canada | London | Paris | Berlin | Rome | Madrid | Sydney | Mexico |
|---|---|---|---|---|---|---|---|---|---|
| Useful | 77% | 82% | 79% | 70% | 75% | 70% | 81% | 80% | 87% |
| Attractive | 29% | 25% | 33% | 27% | 31% | 35% | 32% | 26% | 27% |
| Enjoyable to Have | 29% | 20% | 23% | 25% | 21% | 27% | 20% | 22% | 16% |
| Point of Reference | 5% | 6% | 4% | 4% | 3% | 11% | 7% | 5% | 6% |

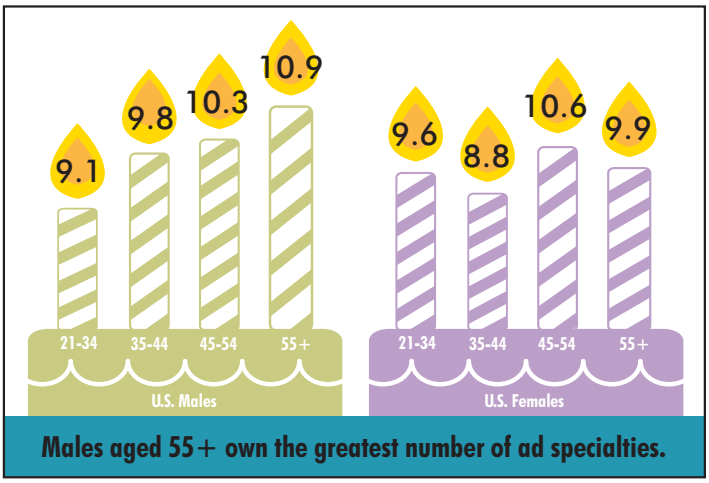
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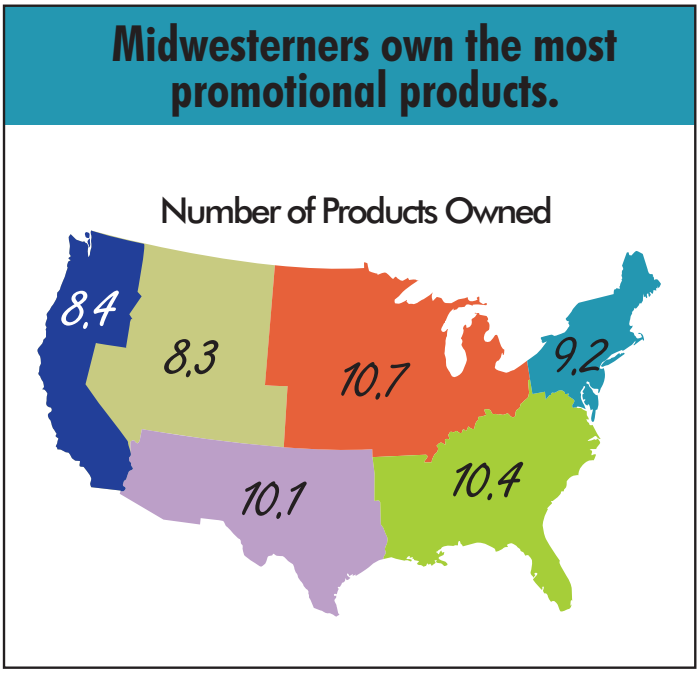
# How Many Items Do People Own?

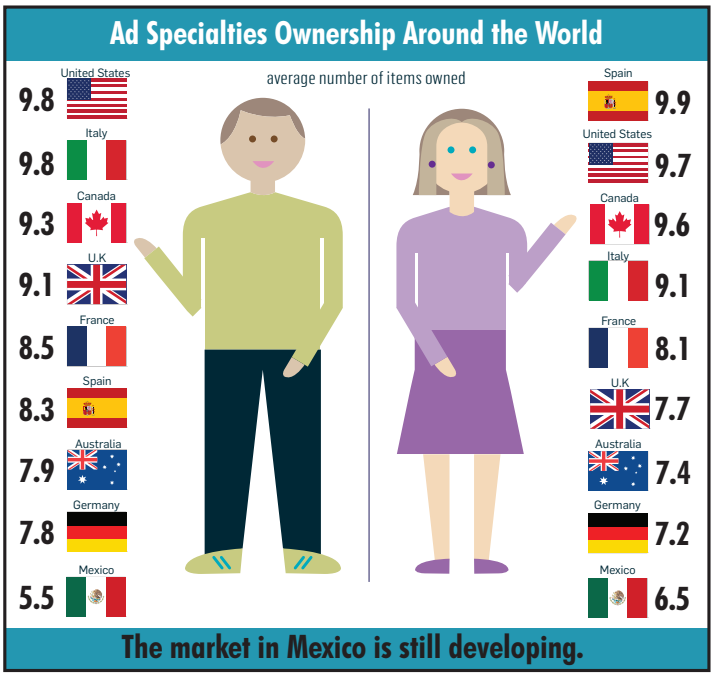
In the study, respondents were asked how many logoed items they currently had in their homes and/or offices. As indicated in the accompanying charts, people in the U.S. own an average of 9.8 promotional products. The number varies according to U.S. region, country, gender, race, age and political affiliation.




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# Recipients' Views on Advertisers

**Nearly six in seven (85%) recipients of promotional products could identify the advertisers on the promotional items they owned.** This is significant since promotional products have such a long shelf life with the consumers who own them. Additionally, recipients not only remember the name of the advertiser, they also overwhelmingly feel more positive about the advertiser. This number is highest for recipients of outerwear, where nearly two-thirds have a more favorable rating of the advertiser. **Promotional products get an advertiser remembered and drive positive opinions**, but can they also drive future purchase intent? The answer is a resounding YES! Across all promotional products, more than one-third of recipients state they are more likely to do business with an advertiser after receiving the item than they were beforehand.

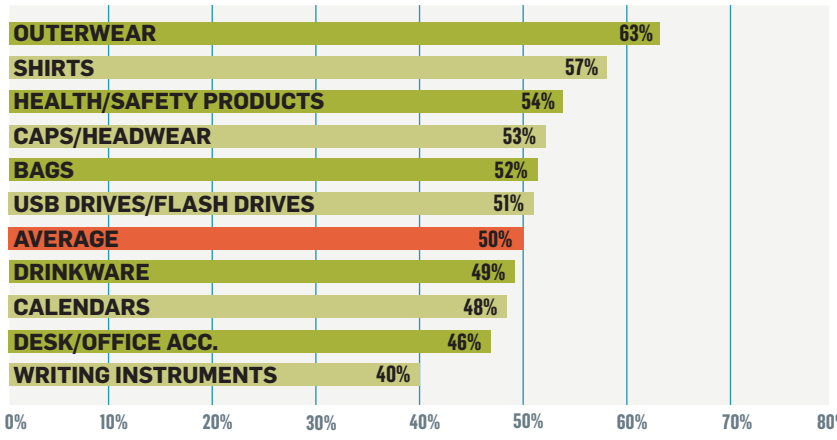
## The world remembers.

**85%** remember the advertiser worldwide.



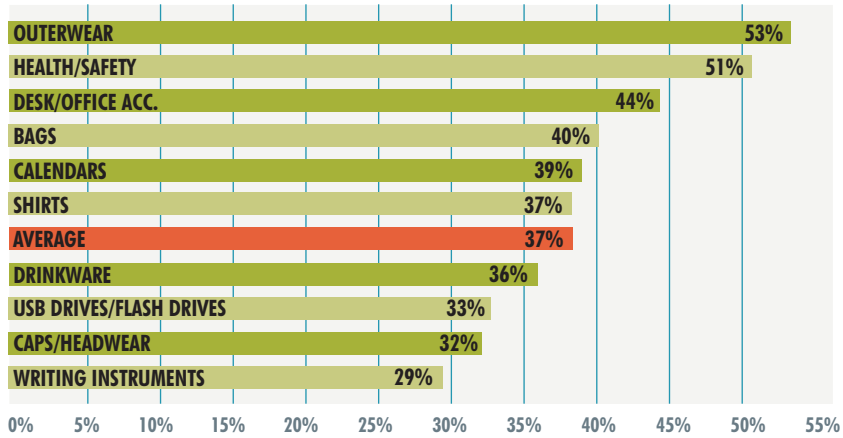
Recall is highest for apparel items, as 88% recall the advertiser that gave them a shirt or hat.

## If You Want to Sway Opinions, Give Outerwear.




Worldwide, 50% of consumers who received a promotional product had a more favorable opinion of the advertiser who gave it to him.

## Drive New Business in Addition to Favorable Opinions.




Nearly four in 10 consumers who received a product from an advertiser they had not done business with said they were more likely to do business with them in the future.

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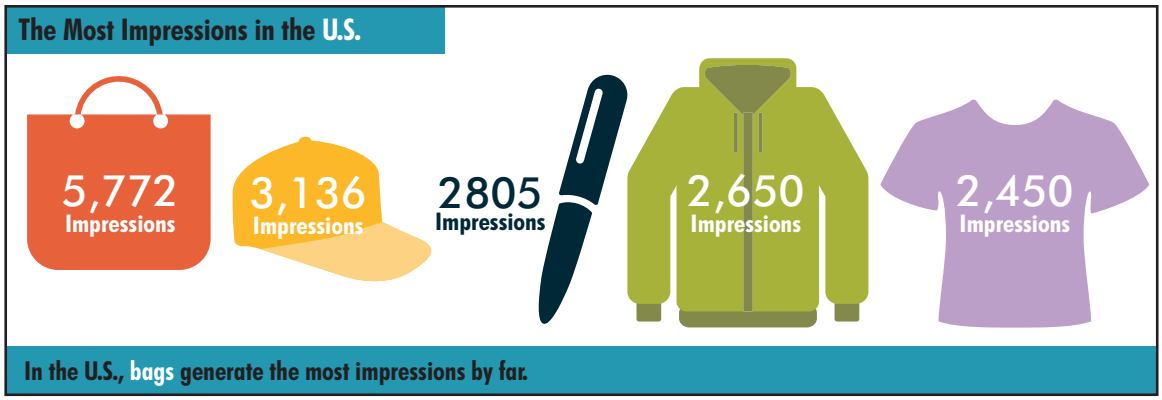
▶Section Three

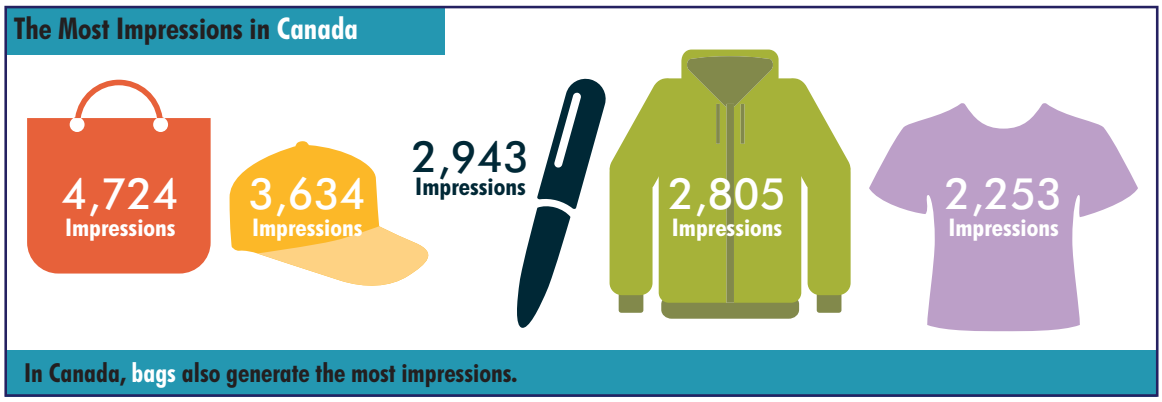
# Promotional Products Make an Impression

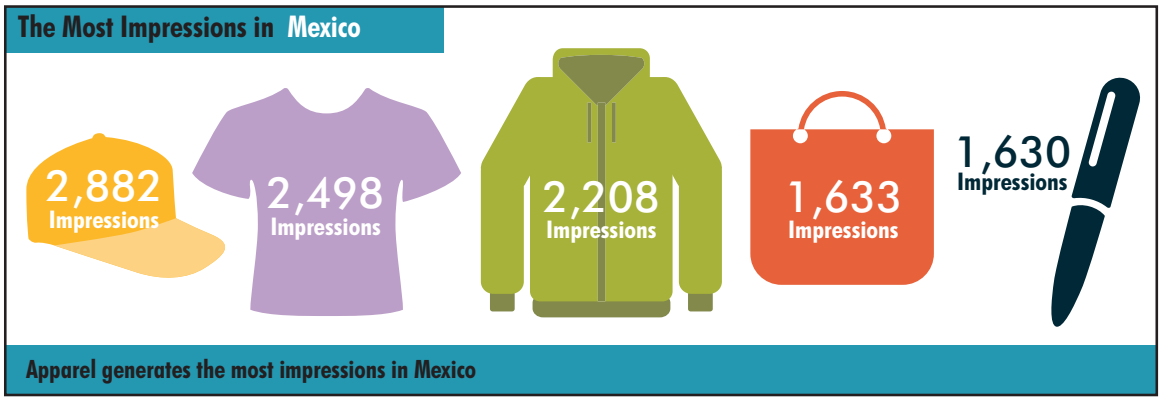
**For this section, the average number of impressions each promotional product receives was calculated.** The number of impressions a product makes was derived from multiplying how long a recipient has the product to how many people they come in contact with each month while using it.

In the U.S., bags continue to generate the most impressions (5,772) of any item measured in the study. This is because bags are used often in public places where they can be seen by many people. Other items that deliver a large number of impressions are writing instruments, hats, outerwear and shirts.

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



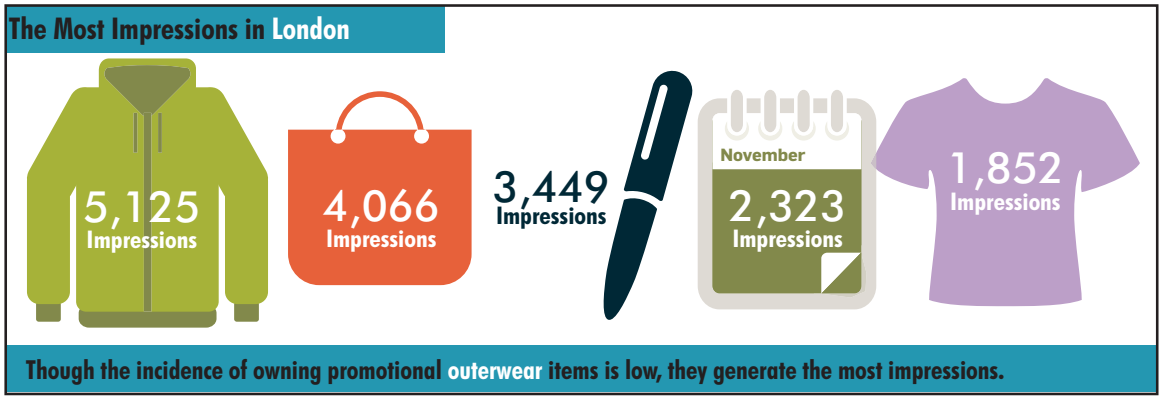



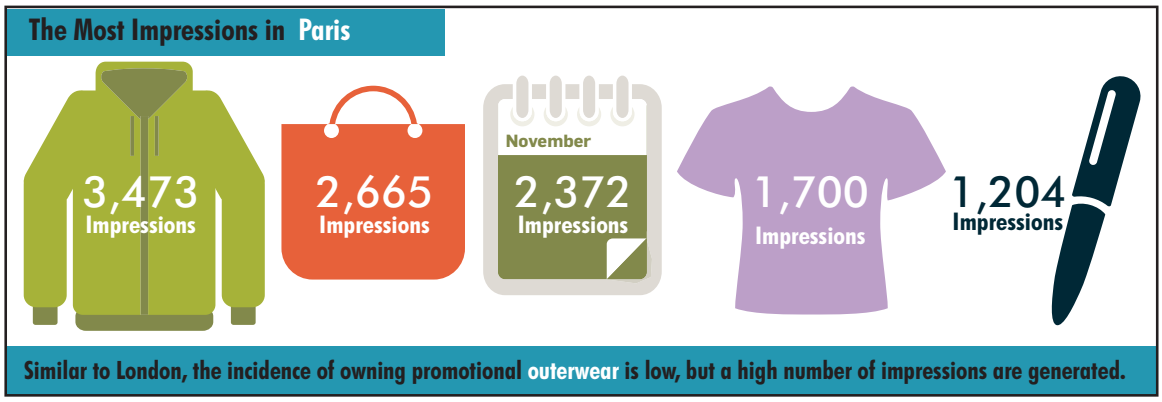



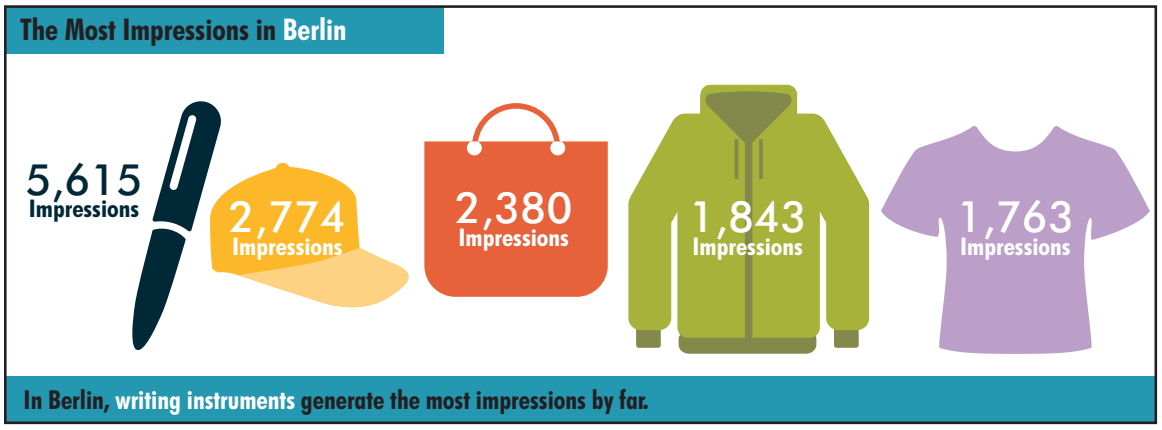

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While the exact ranking of impressions changes somewhat from location to location, the overall list of products generating the most impressions is consistent. Wearables consistently deliver a high number of impressions, and in the U.S., bags deliver 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.

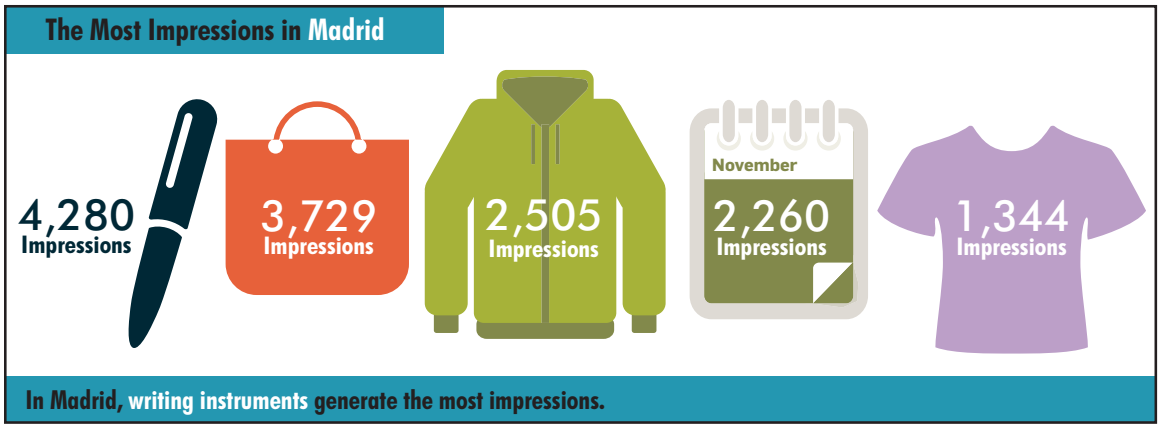


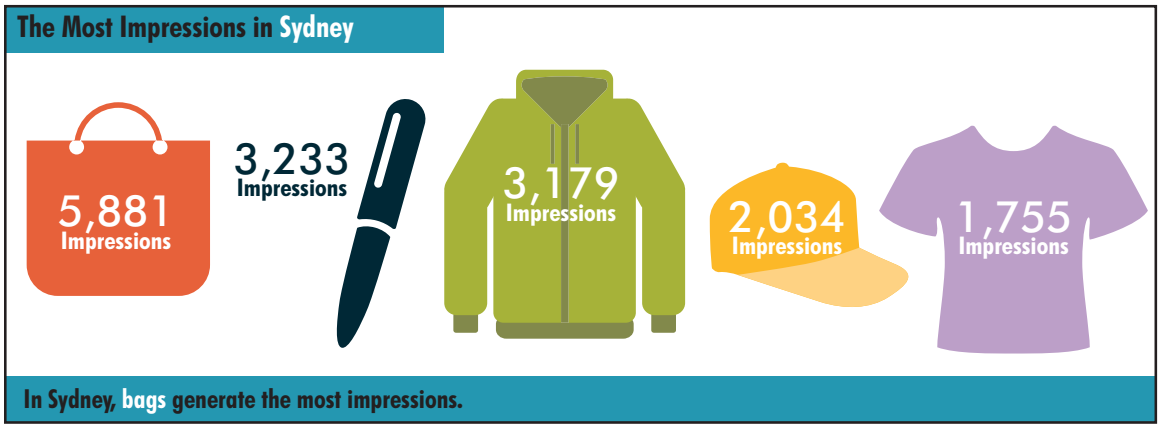

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Distributors should work with clients to determine the goals of their campaigns and the connection they want to establish with the intended recipient before selecting the right vehicle to deliver their message. Taking into account the number and quality 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.










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# Ad Specialties are Cost-Effective

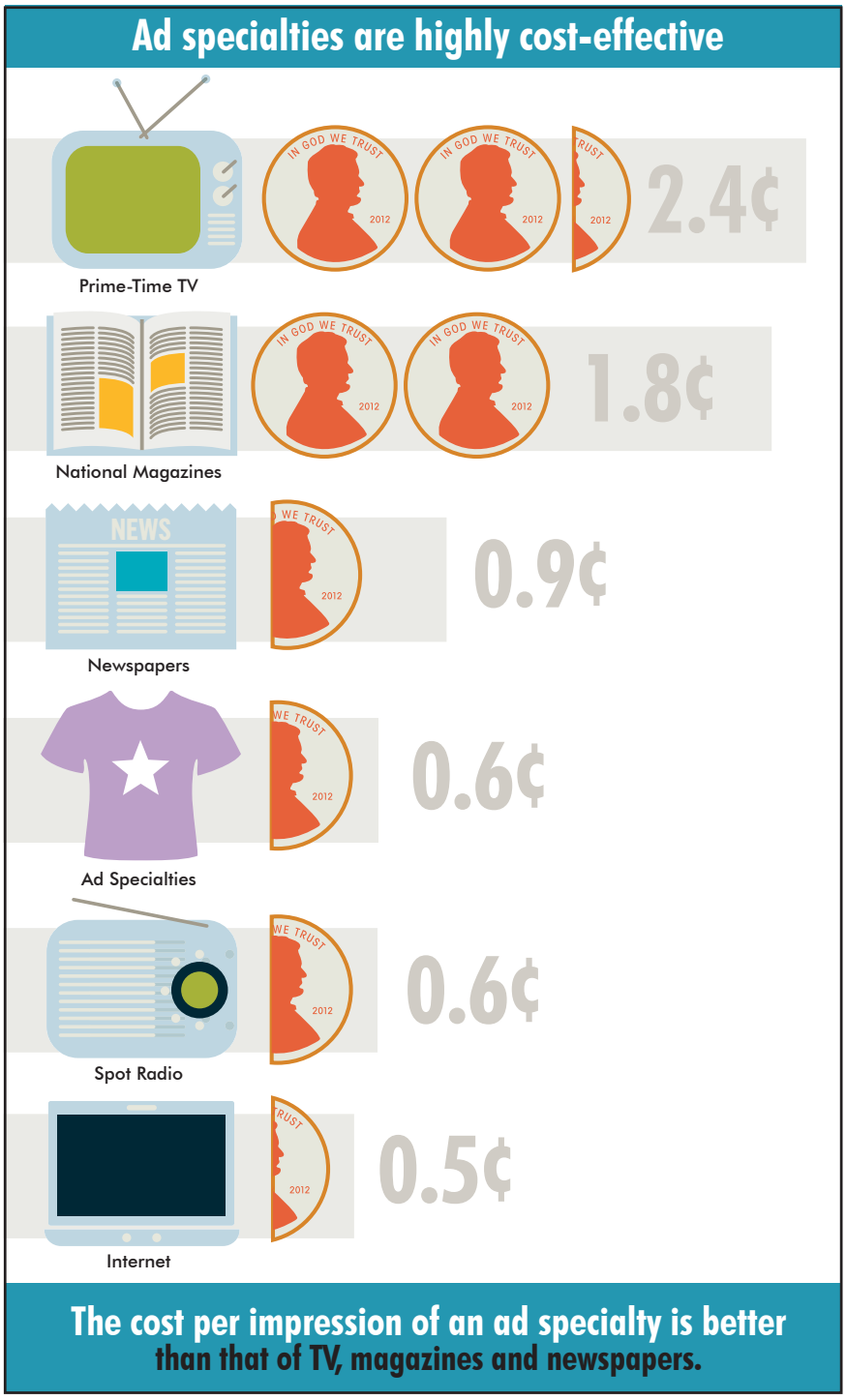
**Advertising specialties remain less expensive per impression than most other forms of advertising.** The investment in ad specialties is modest, more targeted and allows for much greater levels of interaction with consumers than other forms of advertising.

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 radio and Internet advertising. Plus, while all of these other forms of advertising are often passive, advertising specialties allow for much more active interaction, such as storing valuable information on a USB drive or carrying groceries or other items around town in a promotional bag.

Also, consider that when consumers receive advertising specialties, they are often the exact market segment the advertiser is trying to reach. Banks aren't simply mailing out pens to consumers of all ages from all areas, whether or not they have a branch there. Rather, they are giving out the pens only to current or prospective customers in the geographic areas that they serve. This targeted approach to advertising is much more difficult, if not impossible, to achieve in other forms of mass market advertising.

More good news: The cost for advertising specialties is not expected to increase markedly in the next few years, making them a more stable, reliable and innovative way for advertisers to reach consumers.

Even more good news: Consider that the cost of producing a 30-second radio or television commercial is often out of reach for all but the biggest advertisers. Many would have their entire advertising budget eaten up before they even aired the commercial more than a few times. This isn't true with advertising specialties. Companies from the smallest local businesses to the largest *Fortune* 100 companies have access to the best that the advertising specialty business has to offer.




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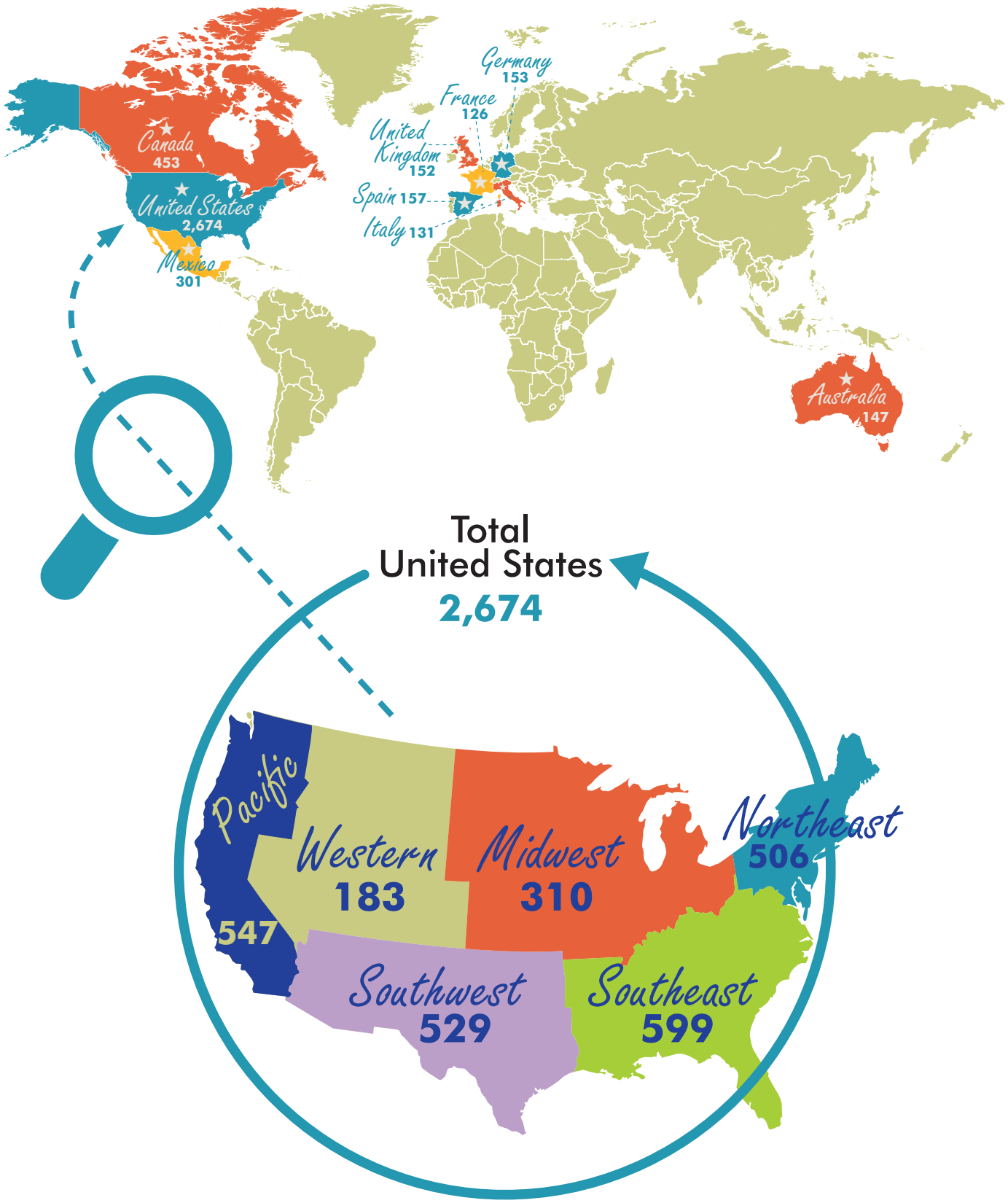
# Demographics

The following is a breakdown of the demographics of all survey respondents.

| | United States | International |
|---|---|---|
| **Gender** | **%** | **%** |
| Male | 48% | 48% |
| Female | 52% | 52% |
| | | |
| **Age** | | |
| Under 35 years | 43% | 48% |
| 35 to 44 years | 22% | 24% |
| 45 to 54 years | 20% | 17% |
| 55 to 64 years | 12% | 9% |
| 65 years and over | 3% | 1% |
| | | |
| **Race** | | |
| White | 66% | |
| Black | 14% | |
| Hispanic or Latino | 10% | |
| Asian | 7% | |
| Other | 3% | |
| | | |
| **Political Affiliation (U.S.)** | | |
| Democrat | 46% | |
| Republican | 23% | |
| Independent | 17% | |
| Other | 3% | |
| Not Registered | 11% | |
| | | |
| **Income** | | |
| Less than $50K | 44% | |
| $50K to $99K | 41% | |
| $100K or more | 15% | |

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# The number of completed surveys.




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