



GLOBAL ADVERTISING SPECIALTIES IMPRESSIONS STUDY

2016 EDITION

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

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



©Copyright 2016 Advertising Specialty Institute. All Rights Reserved

This report may be reproduced and used in presentations by active supplier, distributor and decorator members of the Advertising Specialty Institute (ASI) to educate the public about advertising specialties. Such use must not alter the information and must set forth the following legend: "Research provided by the Advertising Specialty Institute, ©2016, All Rights Reserved." No other use is permitted without the express written consent of ASI.

TABLE of CONTENTS

Methodology	3
► Section One – PRODUCT SPOTLIGHTS	
U.S. Product Ownership	4
International Product Ownership	5
Product Spotlight: Writing Instruments	6
Product Spotlight: T-Shirts	7
Product Spotlight: Bags	8
Product Spotlight: Calendars	9
Product Spotlight: Desk Accessories	10
Product Spotlight: Caps/Headwear	11
Product Spotlight: Drinkware	12
Product Spotlight: USB Drives	13
Product Spotlight: Health & Safety	14
Product Spotlight: Outerwear & Fleece	15
Product Spotlight: Umbrellas	16
Product Spotlight: Mobile Power Banks	17
► Section Two – INFLUENCE/IMPACT	
Most Impactful Product by State	18
Most Influential Products by Key Demos	19
Impact of Environmentally Friendly Products	20
Impact of Made-in-the-USA Products	21
► Section Three – CONSUMER BEHAVIOR	
Staying Power	22
Promo Products are Passed Along	23
Usefulness is Key	24
Number of Products Owned	25
Feelings Generated by Receiving Promotional Products	26
► Section Four – IMPRESSIONS	
North America Impressions	27
International Impressions	28
Cost Effectiveness of Ad Specialties	30
Opinion of Advertising Mediums	31

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 know – 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 around North America, Canada, Europe and Australia. These interviews have been used to gauge the reach of these products, consumers' perceptions of promotional products, their influence on buying decisions and their influence on the perception of the advertiser.

METHODOLOGY: This year's report updates the prior years' reports by greatly expanding the geographic reach of the study across the United States. Using online surveys, we have conducted this year's research with over 100,000 consumers across the United States. Consumers from every state in the United States are represented and for the first time we have expanded beyond just the major cities into suburban and rural America. By employing this new methodology, we are able to provide even more pointed, specific results that show that value of promotional products across the U.S.

Results from prior ASI Ad Impressions studies have been incorporated into this report to allow for a greater depth of analysis and statistics that you can use with your clients to show the value of promotional products.



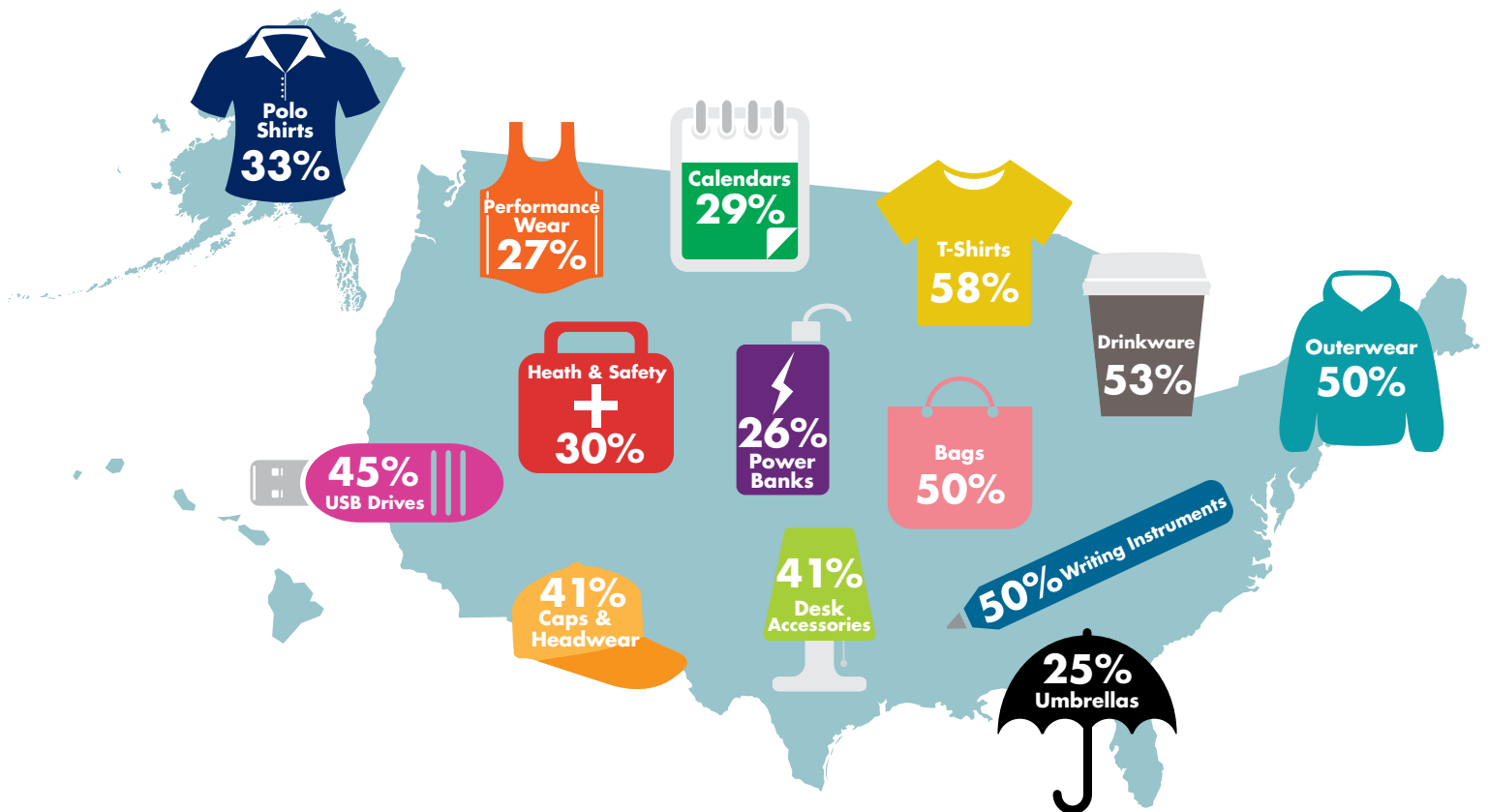
►Section One

PRODUCT POPULARITY

U.S. consumers were asked which promotional products they currently owned. Promotional items were defined as items that include pens, T-shirts, drinkware, calendars or any items that have an advertiser's logo on them. They are usually given away free by companies to consumers.

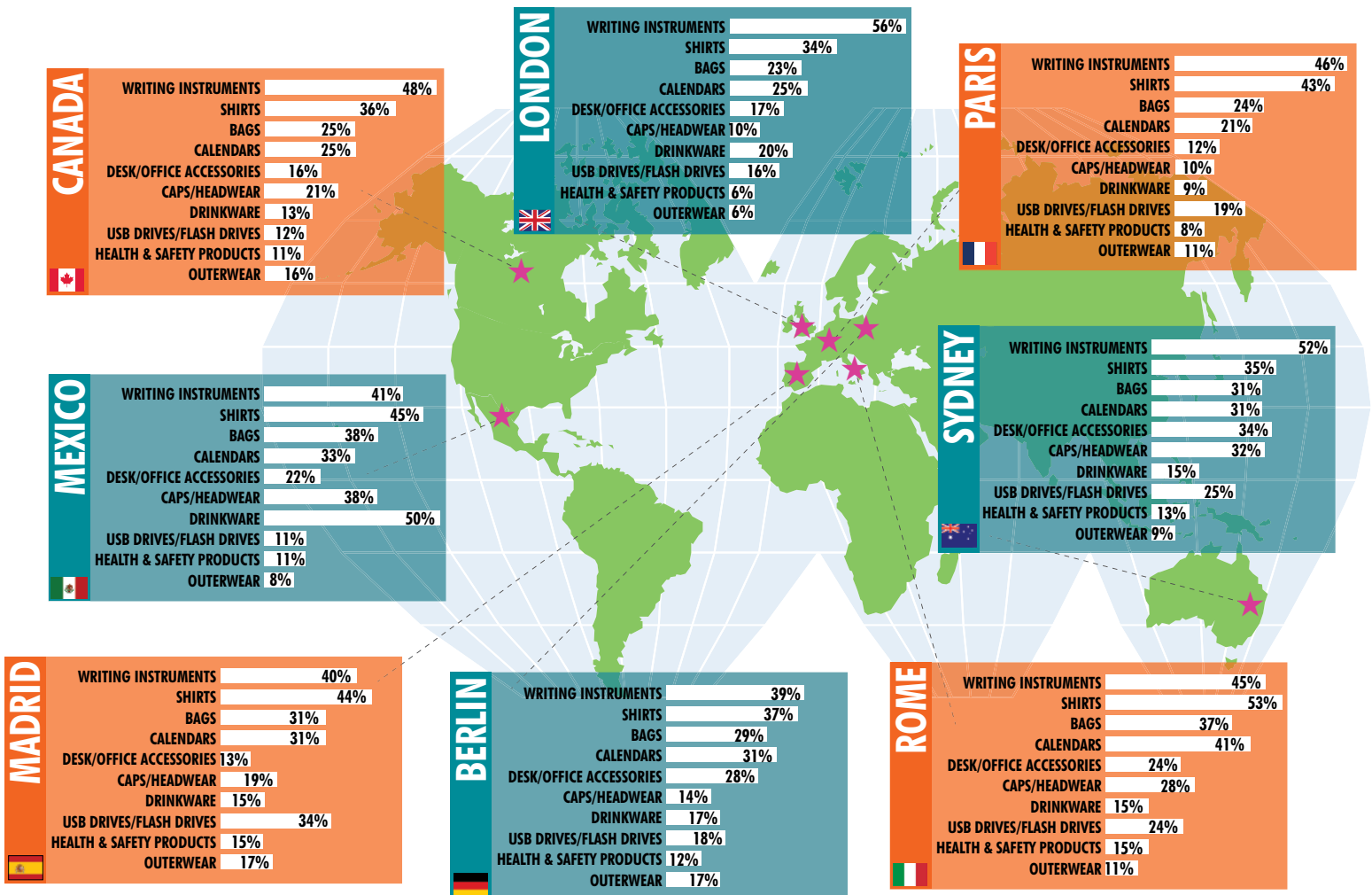
As the graphic below reveals, T-shirts are the item that is most often owned by promotional product recipients in the U.S., followed by drinkware, writing instruments and outerwear. In fact, all promotional products have strong ownership, with one-quarter or more of recipients owning each.

PRODUCTS OWNED in the UNITED STATES



PRODUCT POPULARITY OUTSIDE of the U.S.

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.

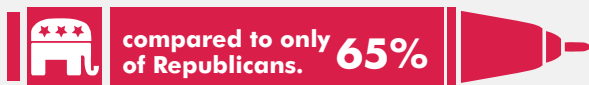


50% of U.S. CONSUMERS OWN PROMOTIONAL WRITING INSTRUMENTS.



Women who live in suburbia are more likely (58%) to own a promo pen than those who live in the city or the country.

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

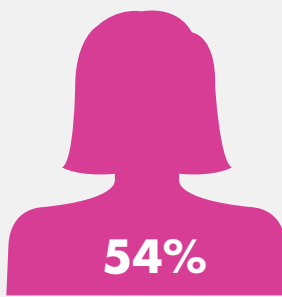


66%

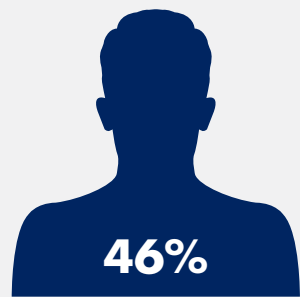


Philadelphians are ready to write in their candidate at this year's convention, as 66% of them own a logoed writing instrument.

Writing Instruments



Female



Male

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

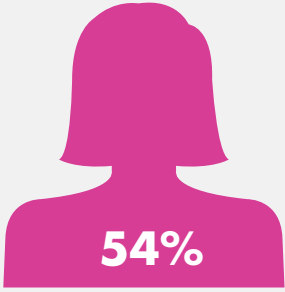
1/10th of a cent



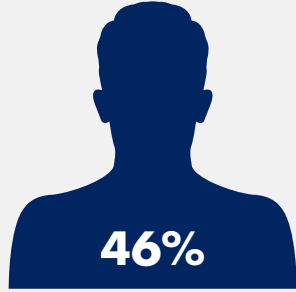
Pens + Impressions = Best Value

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

PRODUCT SPOTLIGHT: T-SHIRTS



Female



Male

More women than men own logoed T-shirts in the U.S.



Rhode Island

The smallest state is biggest on T-shirts – **they are the most influential item in Rhode Island.**

Viva Italia!

53%

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.



58%



The T-shirt is king in California, where 58% report owning a logoed one.



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

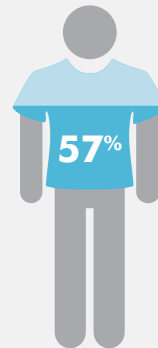
% who recall advertiser on shirt

Midwest:	95%
West:	93%
Pacific:	90%
Southwest:	88%
Northeast:	88%
Southeast:	81%

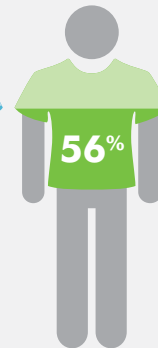
18-34



35-44



45-54



55+



More than half of consumers across all age groups report owning a branded T-shirt.

PRODUCT SPOTLIGHT: BAGS



Among Women

Those 18-24 are the most likely to own a logoed bag.



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



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



Female



Male



Will the Stanley Cup fit in my promo bag?

Nearly two-thirds of consumers in Illinois report owning a promo bag, among the highest rates in the country.

Down under, bags get the most impressions.



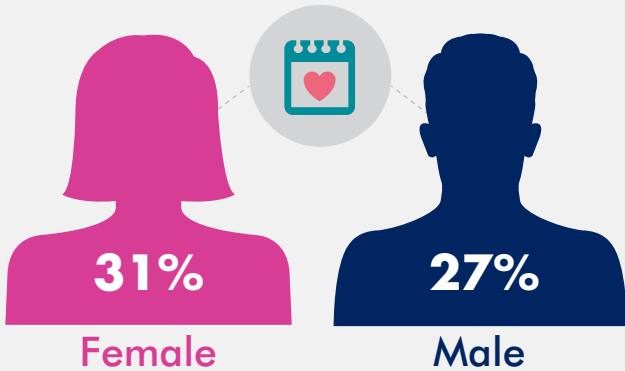
The only location that has more impressions per bag than the U.S. is **Sydney**, with over **5,800 per promo bag**.

PRODUCT SPOTLIGHT: CALENDARS



It's a Great Lakes Thing

More than 4 in 10 consumers in Ohio and Michigan report owning branded calendars.



Women in the U.S. are slightly more likely to own a logoed calendars.

On Display

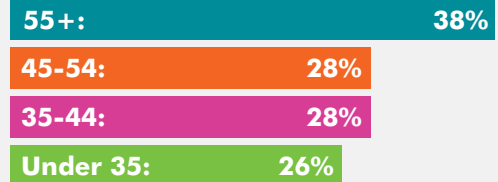
Promotional calendars are great branding tools.



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



Older and Wiser



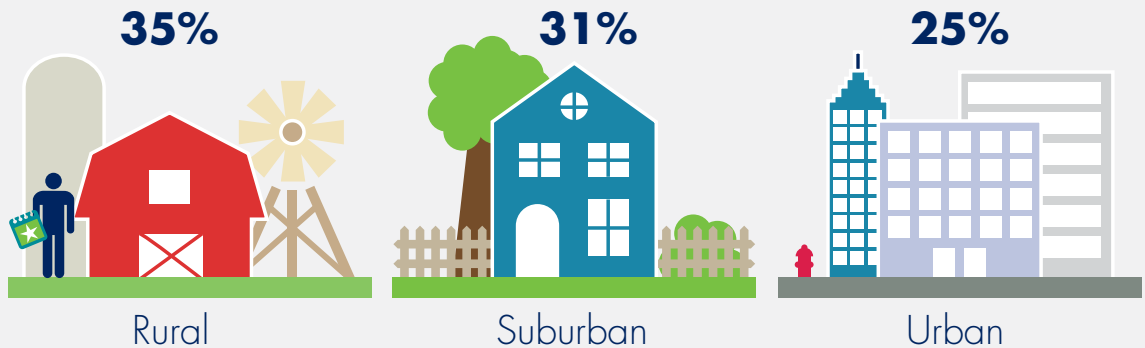
Older Americans are more likely to own promotional calendars.

A Year's Worth of Branding

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



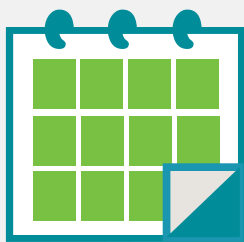
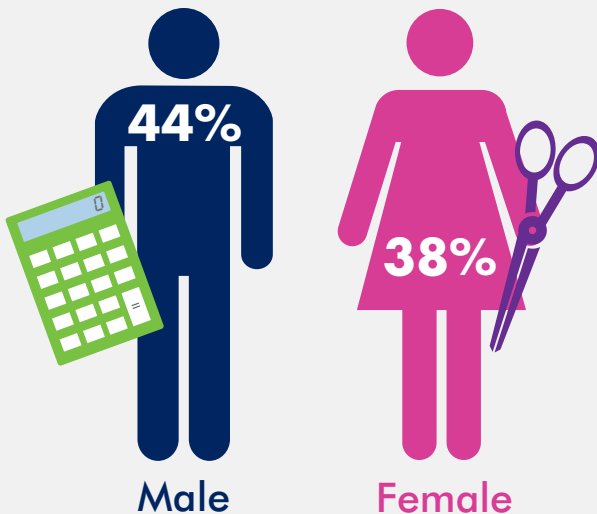
Consumers in rural America are most likely to own a promo calendar.



PRODUCT SPOTLIGHT: DESK ACCESSORIES

41% of U.S. CONSUMERS OWN PROMOTIONAL DESK/OFFICE ACCESSORIES.

Men are more likely than women to own branded desk/office accessories.

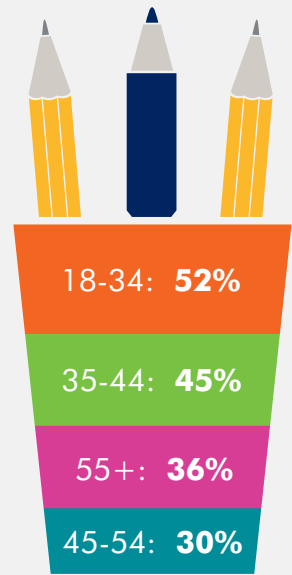


More Than a Year Consumers who own a promotional desk accessory report they typically will keep it for about 14 months.

14 months

Millennials **love** desk accessories

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



The 49th and 50th states are #1 with logoed desk/office accessories.

67%

of consumers in Alaska and Hawaii report owning logoed desk/office accessories.

Desk accessories make their impressions in the office.

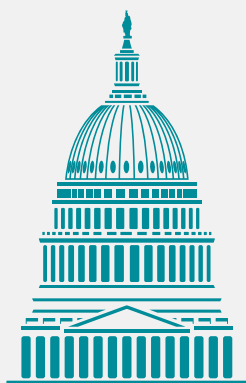


PRODUCT SPOTLIGHT: CAPS & HEADWEAR

Hats need to look good!



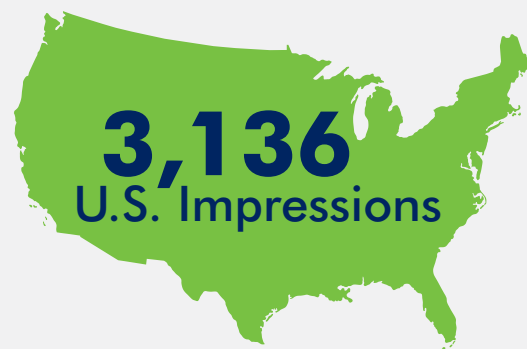
42% of U.S. consumers who keep promotional hats do so because they are attractive, second only to outerwear.



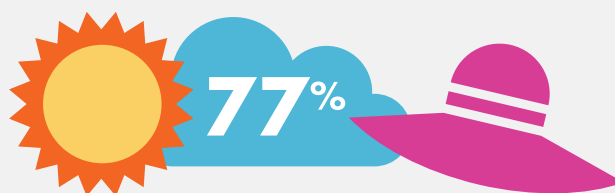
Politicians must love their promo headwear.

In Washington D.C., hats rate a close second to USB drives as the most influential promo product.

41% of U.S. CONSUMERS OWN PROMOTIONAL CAPS/HEADWEAR.



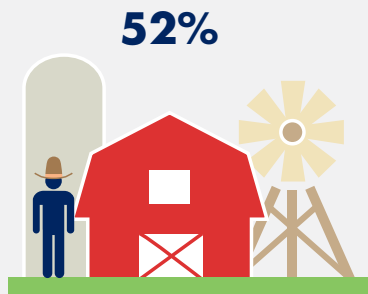
The number of impressions that caps make over their lifetime in the U.S.



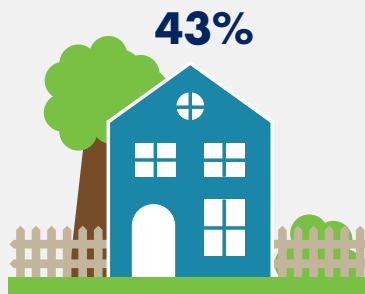
It's sunny in Florida.

Among owners of promotional headwear in Tampa, three-quarters report wearing them once a week or more.

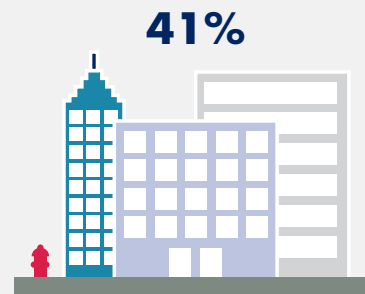
Men in rural America are tops for logoed headwear with 52% ownership.



Rural



Suburban



Urban

53% of U.S. CONSUMERS

OWN PROMOTIONAL DRINKWARE.



GO TEAM!

Razorback fans show off their drinkware.

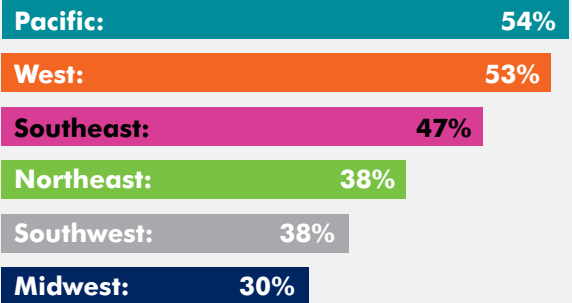
Consumers in Arkansas select Drinkware as their most influential promotional product.



The Pacific Northwest loves their logoed drinkware.

61% of consumers in Washington and Oregon own logoed drinkware.

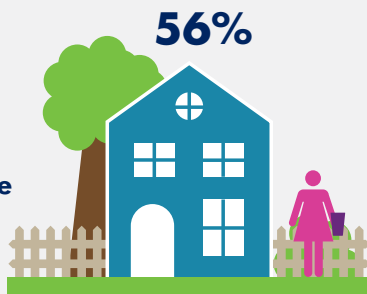
More than half of the consumers in the West and Pacific regions report **they are more likely to do business with the advertiser on their drinkware.**



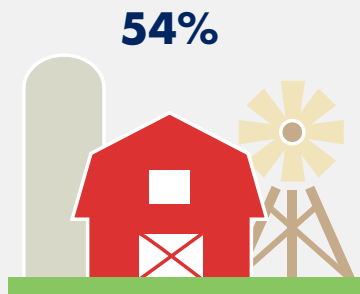
Bottoms up!

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

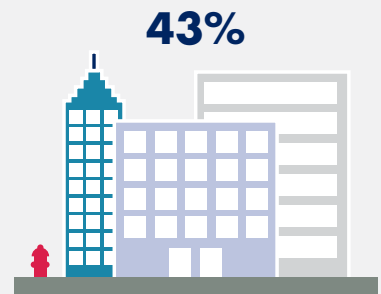
Logoed Drinkware is biggest outside of the big cities.



Suburban

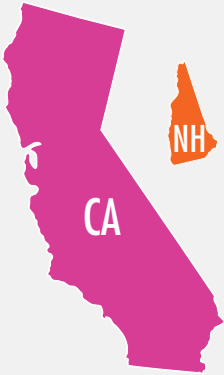


Rural



Urban


PRODUCT SPOTLIGHT: USB DRIVES



What do **California** and **New Hampshire** have in common?

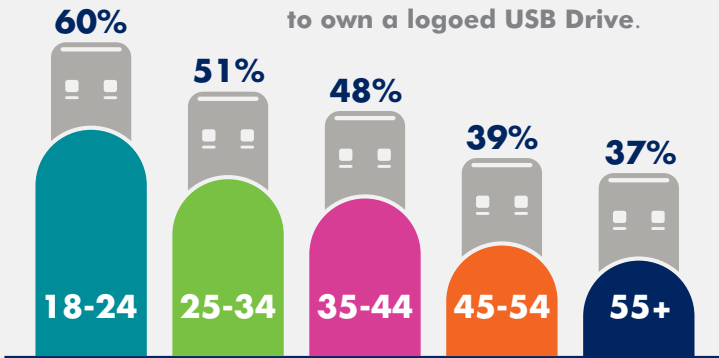
They both chose **USB Drives** as their most influential promo product.

45%
of U.S. **CONSUMERS**
OWN PROMOTIONAL **USB DRIVES.**

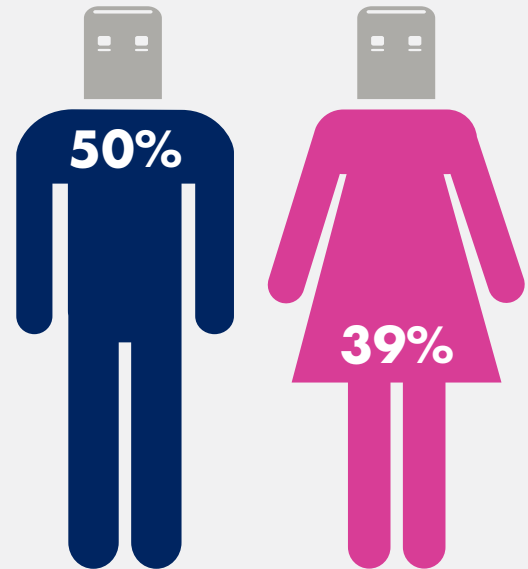


Trending Young

Younger consumers are **most likely** to own a **logged USB Drive**.



Men are much more likely to own a **branded USB Drives**.



Utility is Key

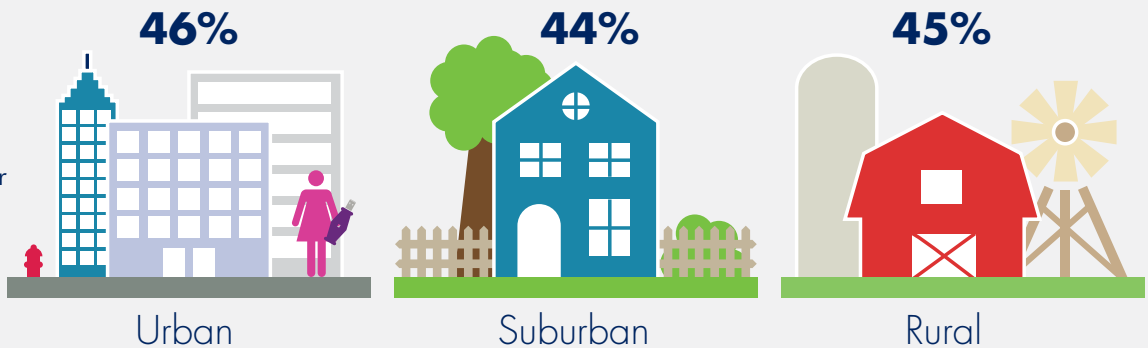


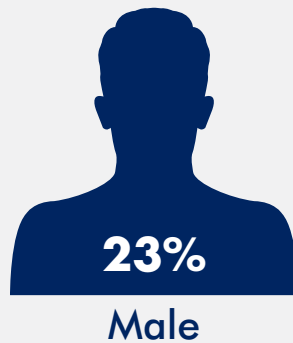
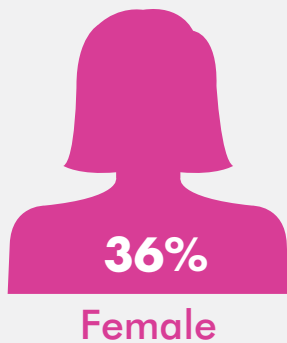
In the U.S., **7%** keep **USB Drives** because they are **attractive**.



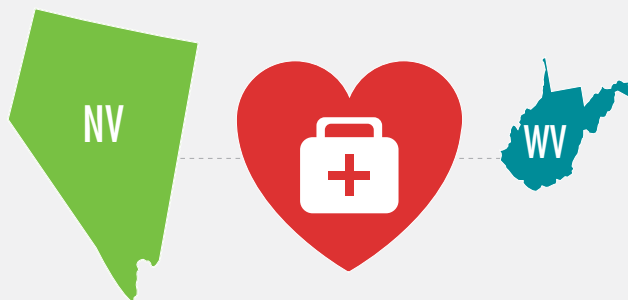
In the U.S., **91%** keep **USB Drives** because they are **useful**.

City or country – everyone loves their promo **USB Drives**.





Women are much more likely to own a branded Health and Safety Product.



Nevada and **West Virginia** have one thing in common

– their love for Health and Safety products.

Health and Safety products are the most influential products in these two states.



82%

of U.S. consumers can immediately remember the advertiser's name on the safety product they own.



Consumers in Michigan

are the most likely to own a **logoed Health and Safety product** at 42%.



Have health and safety product, will travel

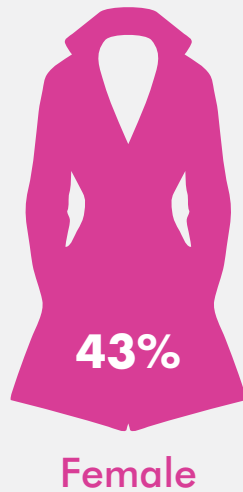
27% of U.S. consumers who own a health and safety product report they carry it with them.

PRODUCT SPOTLIGHT: OUTERWEAR & FLEECE

Across all ages,
outerwear is a top 5 influential product.



**More men own promotional
outerwear than women.**



Warm Weather or Cold Weather,
Outerwear is the most influential product in **12 states.**

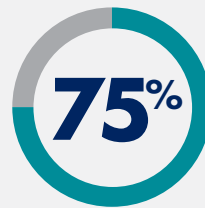
(AZ, CT, DE, IA, KY, NJ, MA, ME, NC, PA, UT, WY)

50% of U.S.
CONSUMERS
OWN PROMOTIONAL
OUTERWEAR
and FLEECE.



Outerwear is kept for a variety of reasons.

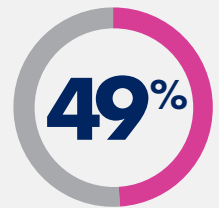
Reasons for keeping promo outerwear:



Useful



Attractive



Enjoyable to Have

86%



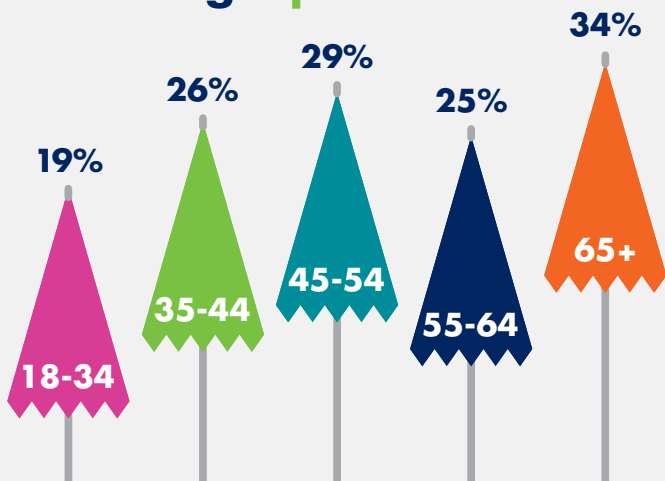
Bundle Up!

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.

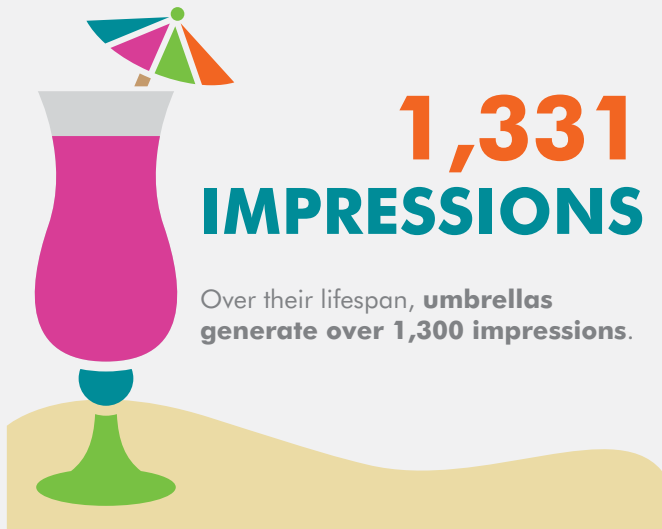


25% of U.S. CONSUMERS OWN PROMOTIONAL UMBRELLAS.

Trending Up!

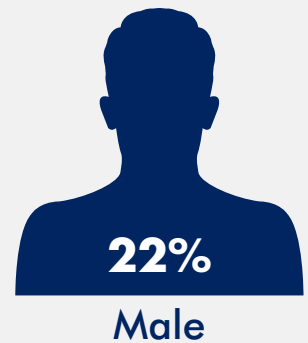
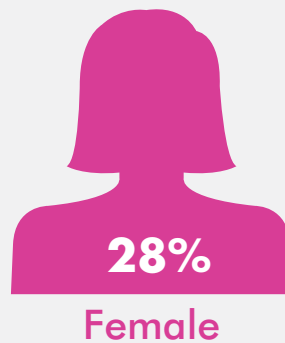
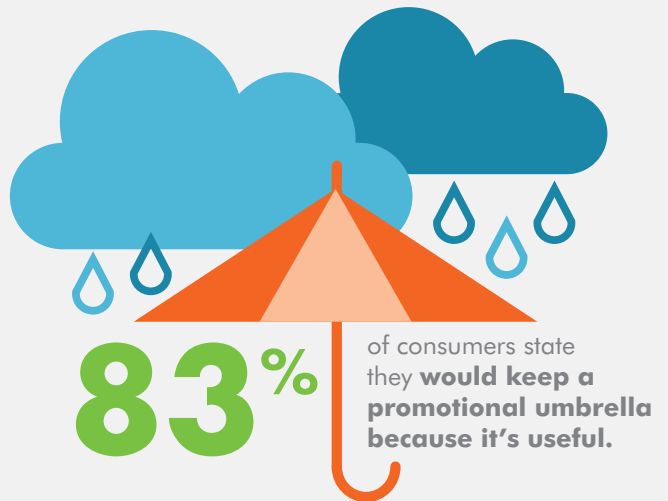


Ownership of promo umbrellas trends upward with age.



51% More than half of consumers state they would be more likely to do business with the advertiser who gave them the umbrella.

Umbrellas are Useful!

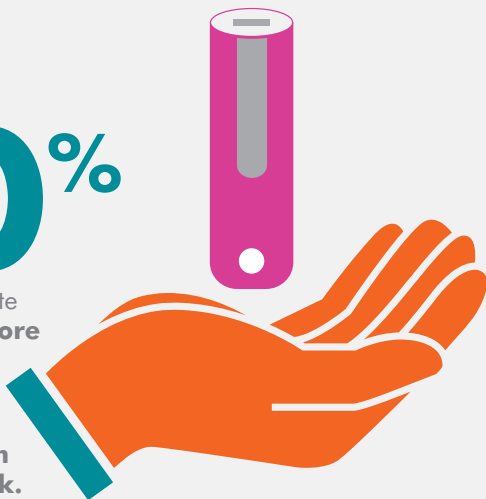


Women are more likely than men to own promo umbrellas.

PRODUCT SPOTLIGHT: MOBILE POWER BANKS

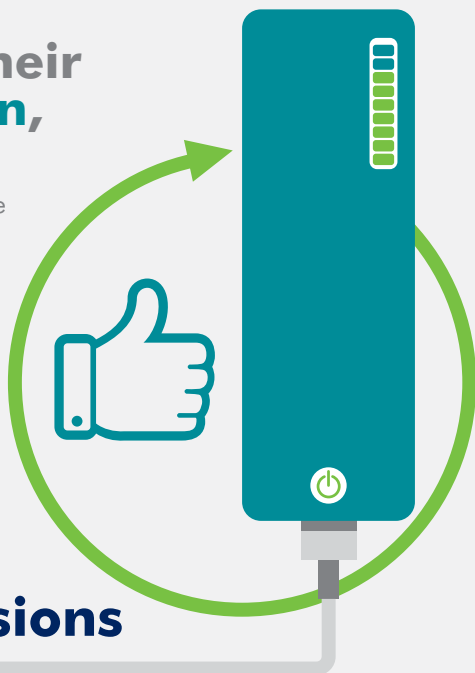
60%

of consumers state they would be **more likely to do business with the advertiser who gave them the Power Bank.**



Over Their Lifespan,

mobile Power Banks generate over 1,000 impressions.



1,034 Impressions

Power Banks are on Top!



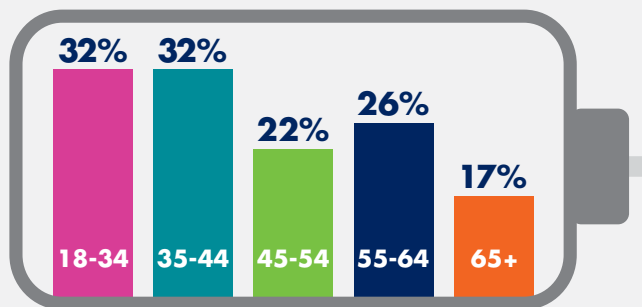
Mobile Power Banks resonate in the Rockies. They are the most influential product in Colorado.

26%

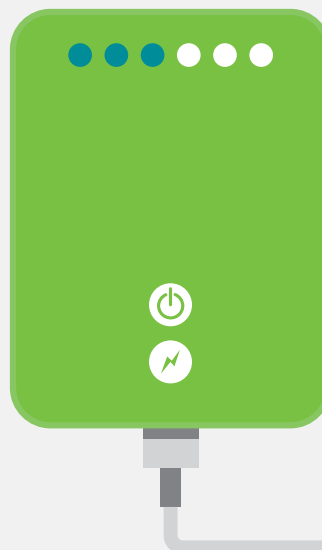
of U.S. **CONSUMERS** OWN PROMOTIONAL MOBILE POWER BANKS.



Trending Down!



Ownership of mobile power banks trends down with age.



Keeping Power

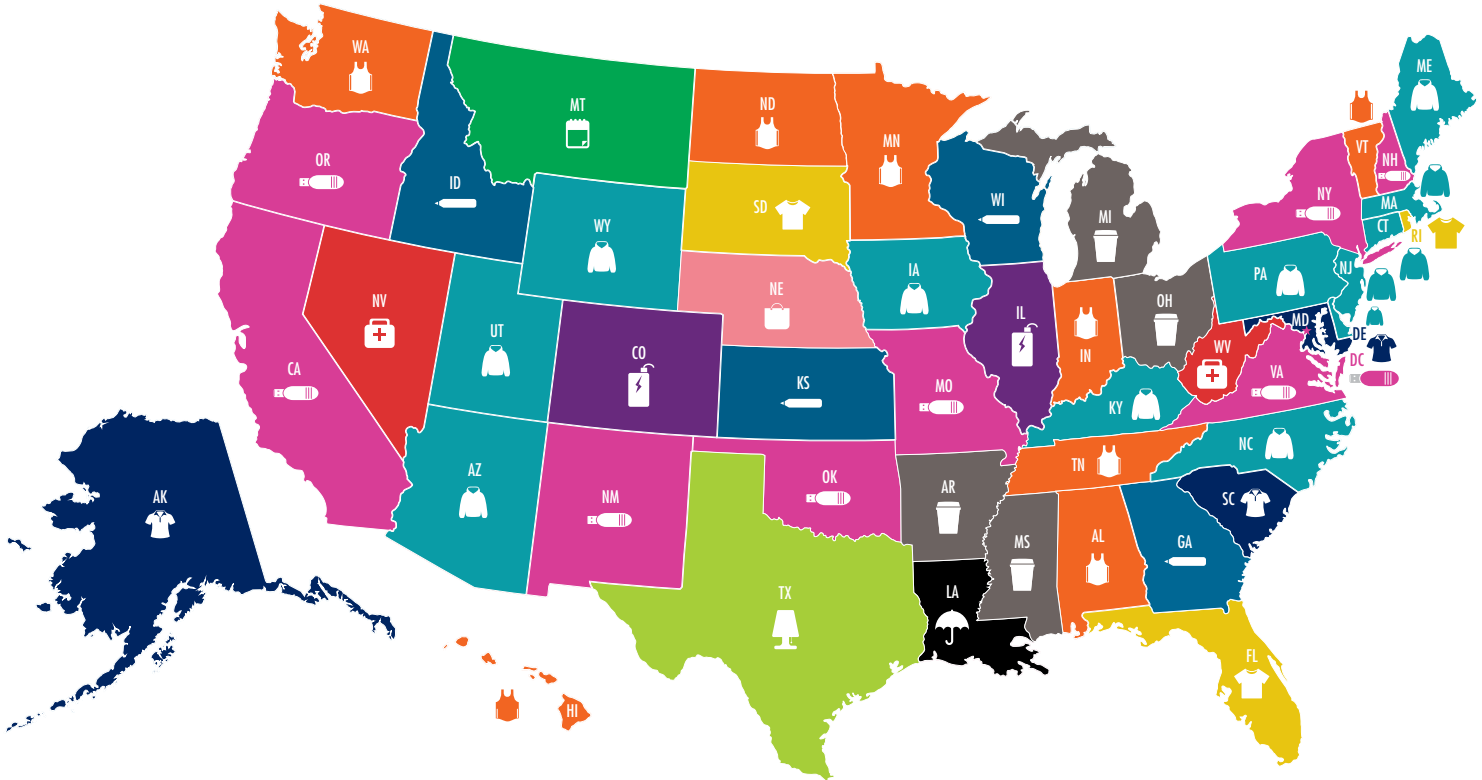
87%

of consumers state they would keep a **promotional Power Bank** because it's useful.

Promotional Products that have the **Biggest Impact on Opinions about Advertiser**. Opinions are by state.

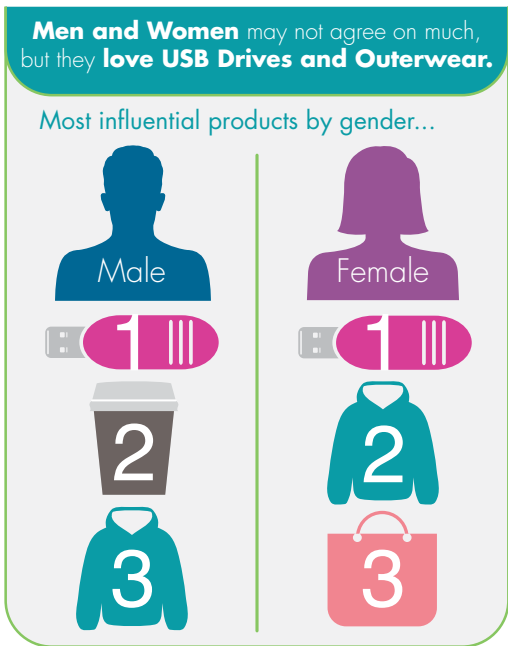
★ **PRODUCTS ARE COLOR CODED BY STATE**

NATIONWIDE



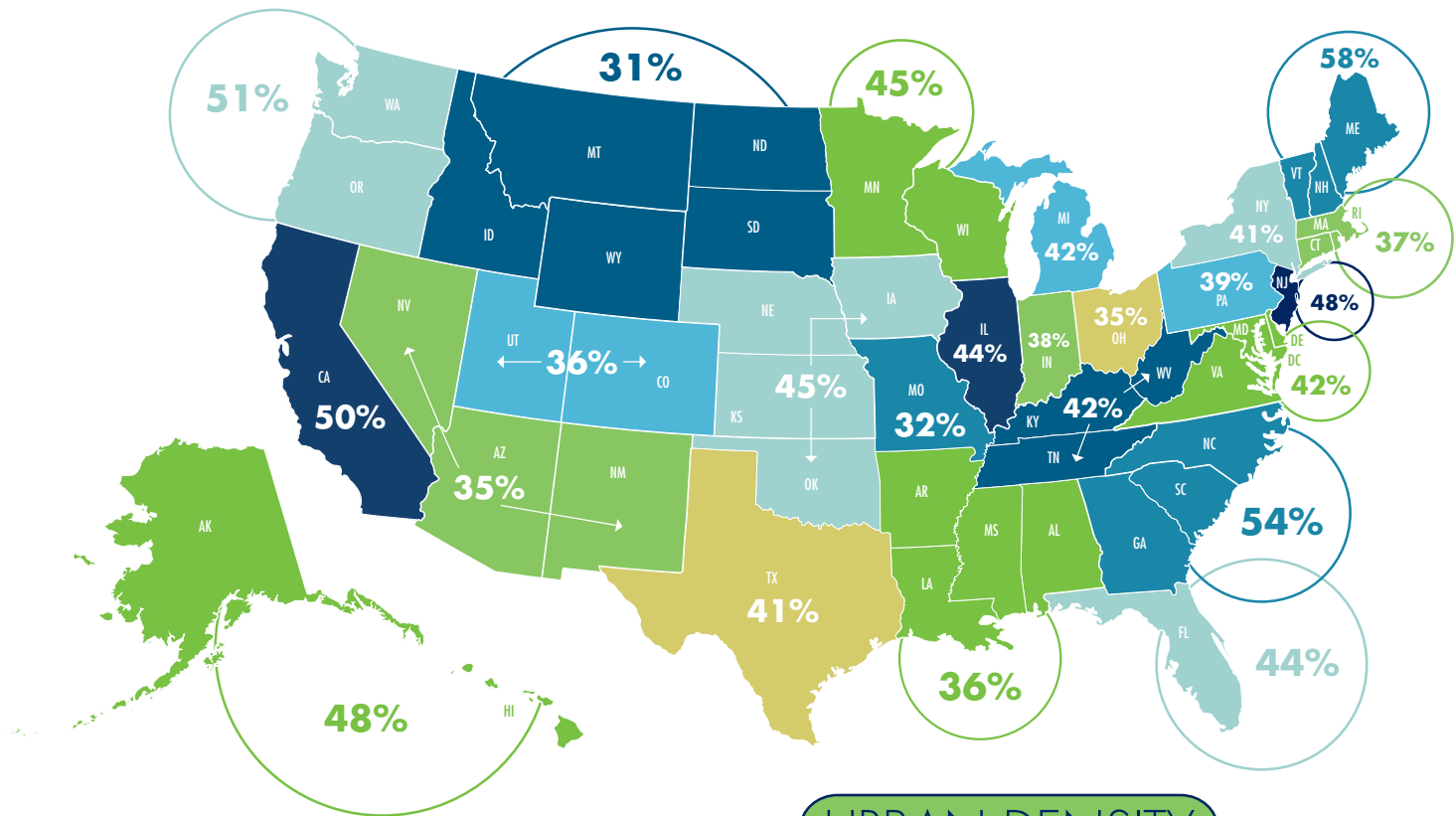
★ **Leading Color Coded Products Key by State:**

If you want to influence opinions, **GIVE AWAY USB DRIVES.**
Top 5 most influential products on opinion of advertisers.



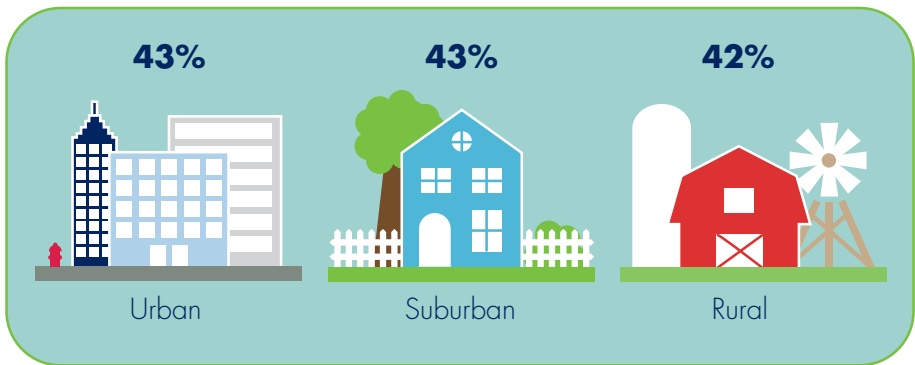
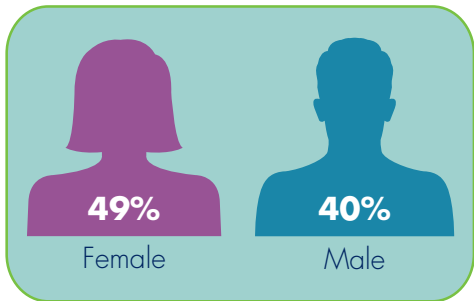
In **TOTAL**, **42%** have a more favorable opinion of an advertiser if the Promotional Product they received was **ENVIRONMENTALLY FRIENDLY**.

NATIONWIDE

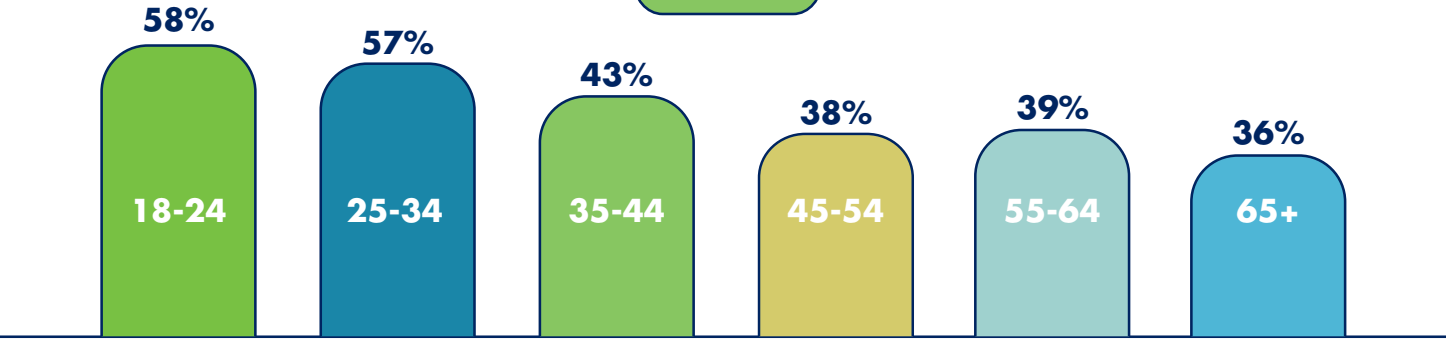


URBAN DENSITY

GENDER

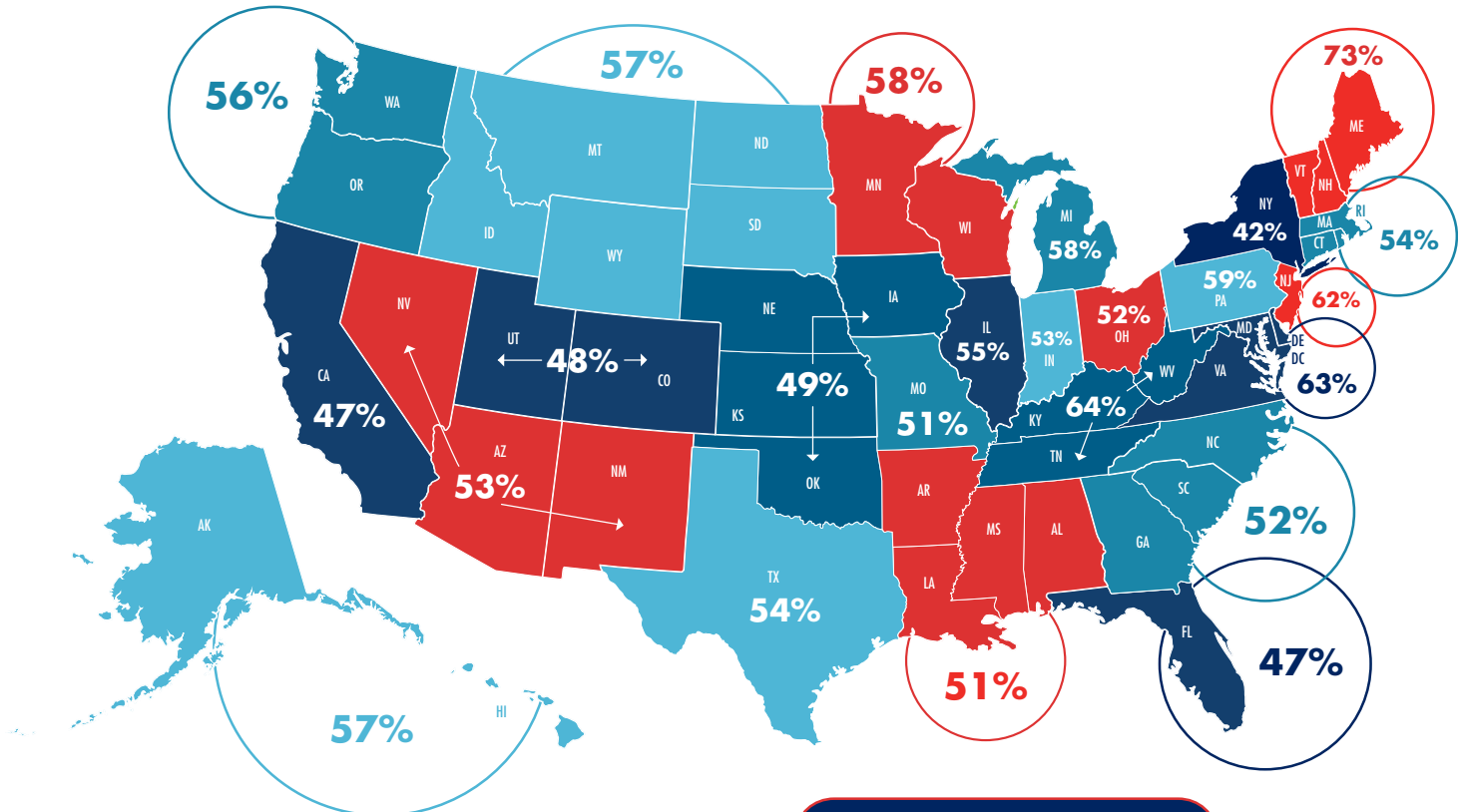


AGES



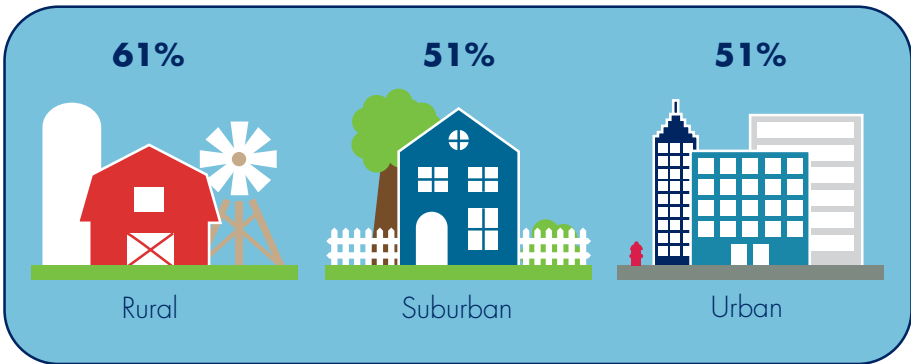
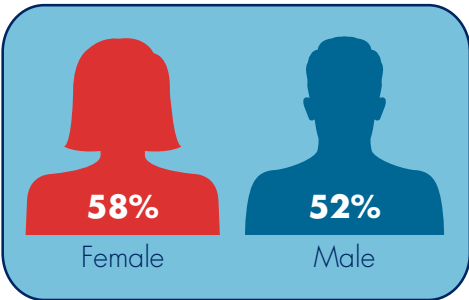
In **TOTAL 53%** have a more favorable opinion of an advertiser if the promotional product was **MADE IN THE USA.**

NATIONWIDE

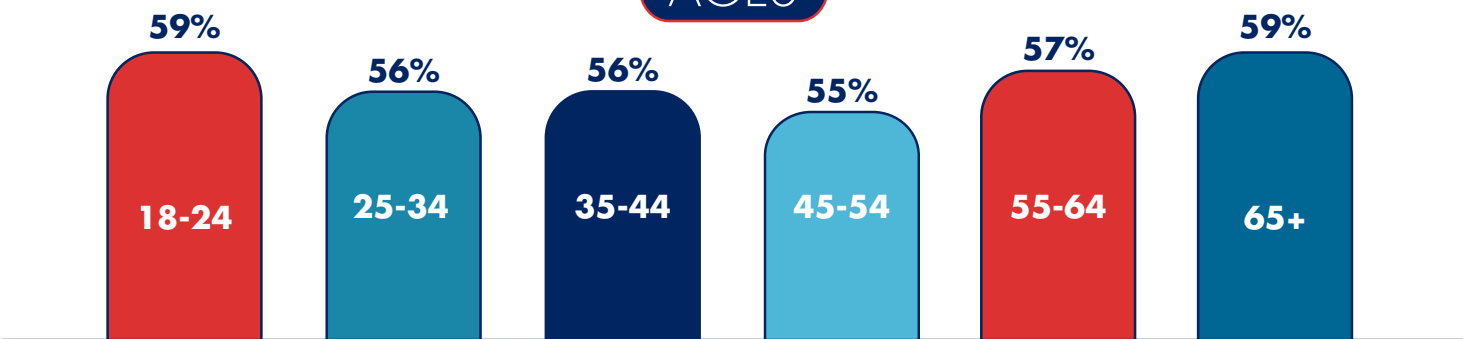


URBAN DENSITY

GENDER



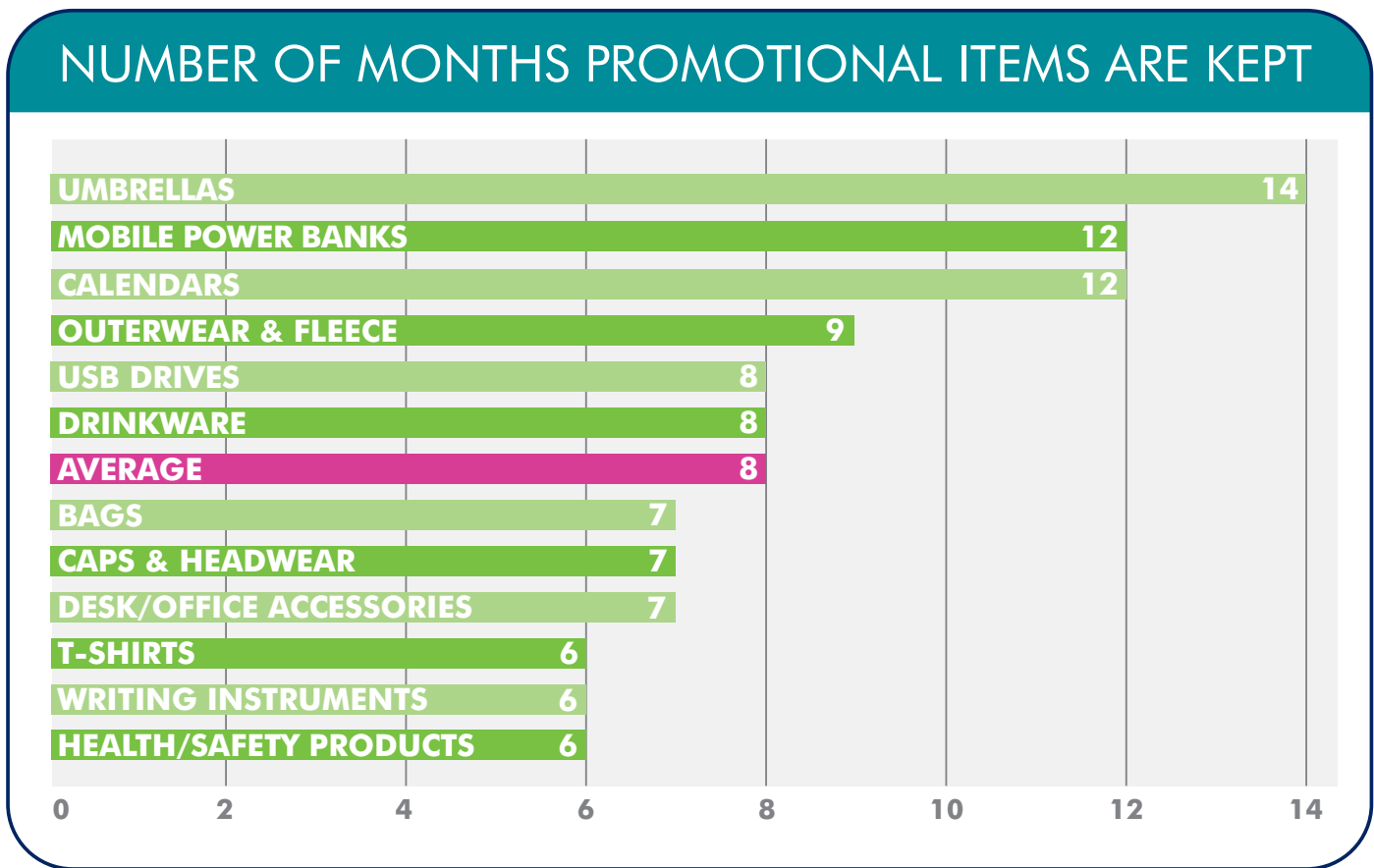
AGES



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.



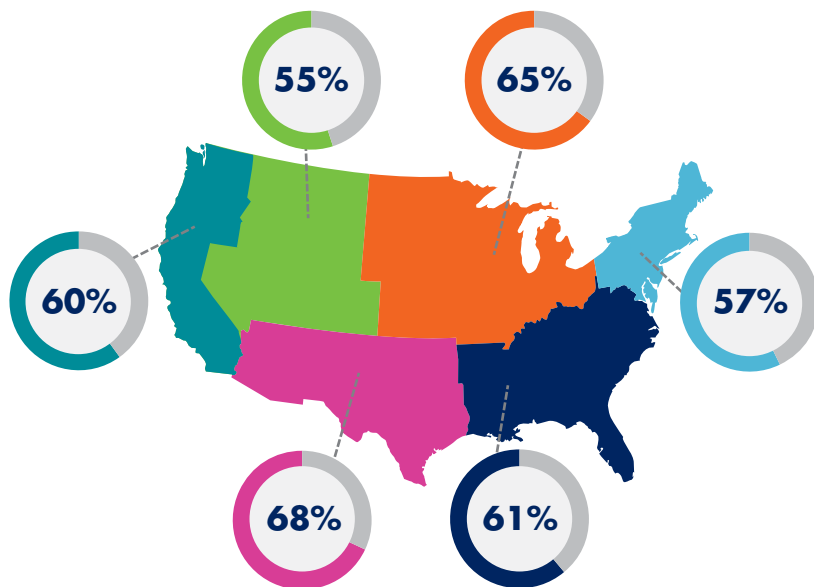
PROMO PRODUCTS ARE PASSED ALONG

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 than 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.

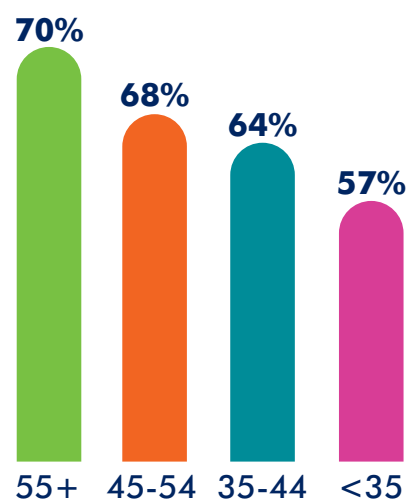
Areas Interviewed	United States	Canada	London	Paris	Berlin	Rome	Madrid	Sydney	Mexico
Throw it away	20%	18%	15%	21%	28%	23%	22%	18%	42%
File the item away	17%	18%	18%	21%	16%	29%	24%	18%	20%
Give the item to someone else	63%	64%	67%	59%	56%	48%	54%	64%	38%

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 Give Away an Item Than are Older Consumers



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

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 attractiveness 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 because 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.

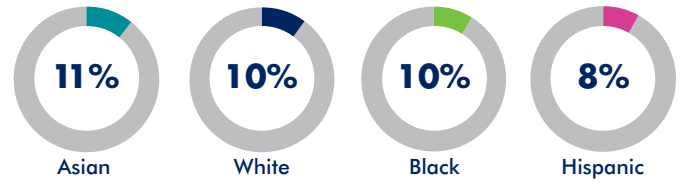
	Useful	Attractive	Enjoyable to Have	Point of Reference
Bags	87%	31%	23%	3%
Calendars	88%	37%	23%	13%
Desk/Office Accessories	85%	20%	20%	7%
Drinkware	84%	27%	30%	2%
Hats	65%	42%	36%	3%
Health/Safety Items	84%	11%	16%	4%
Mobile Power Banks	87%	13%	15%	10%
Outerwear	75%	54%	49%	5%
T-Shirts	70%	37%	33%	2%
USB Drives	91%	7%	18%	4%
Writing Instruments	93%	17%	16%	7%
Umbrellas	83%	28%	16%	4%
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%

HOW MANY ITEMS DO PEOPLE OWN?

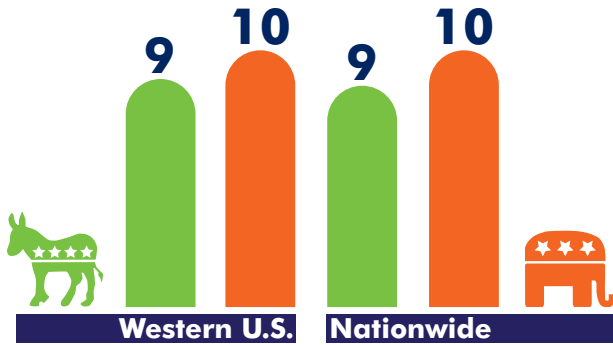
In the study, respondents were asked how many logged items they currently had in their homes and/or offices. As indicated in the accompanying charts, people in the U.S. own an average of 9.8 promotional products. The number varies according to U.S. region, country, gender, race, age and political affiliation.

Among U.S. consumers, Asians have the most ad specialty products.

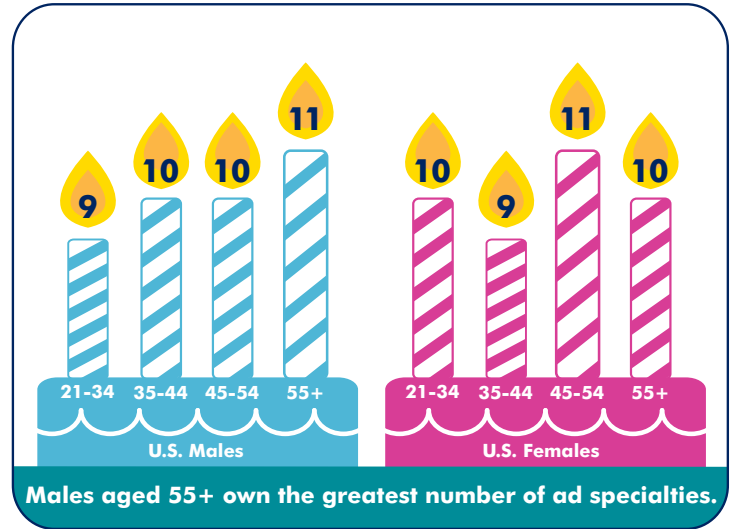


15% of Asian consumers report having 21 or more products.

Nationwide, Republicans have more products than Democrats.



In the Western regions, including Texas, Republicans own more.

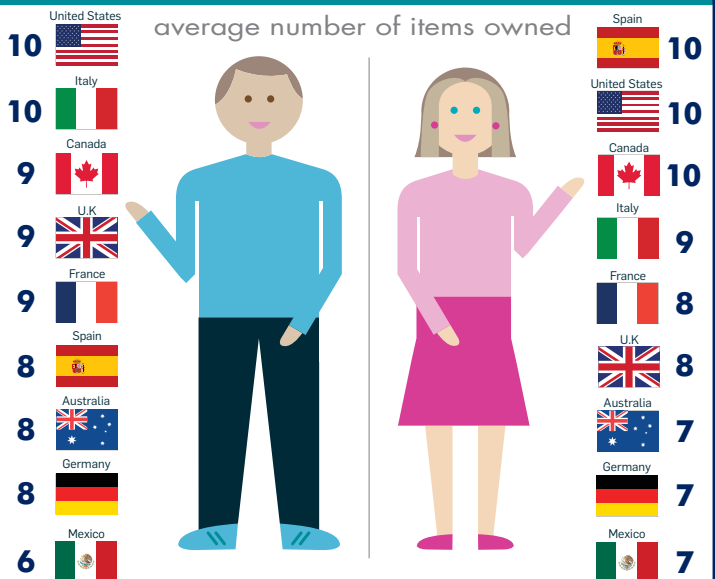


Males aged 55+ own the greatest number of ad specialties.

Midwesterners own the most promotional products.



Ad Specialties Ownership Around the World



The market in Mexico is still developing.

What happens when you ask 2,000 people the following: "When you receive a promotional product, how do you feel about the company that gave it to you?"



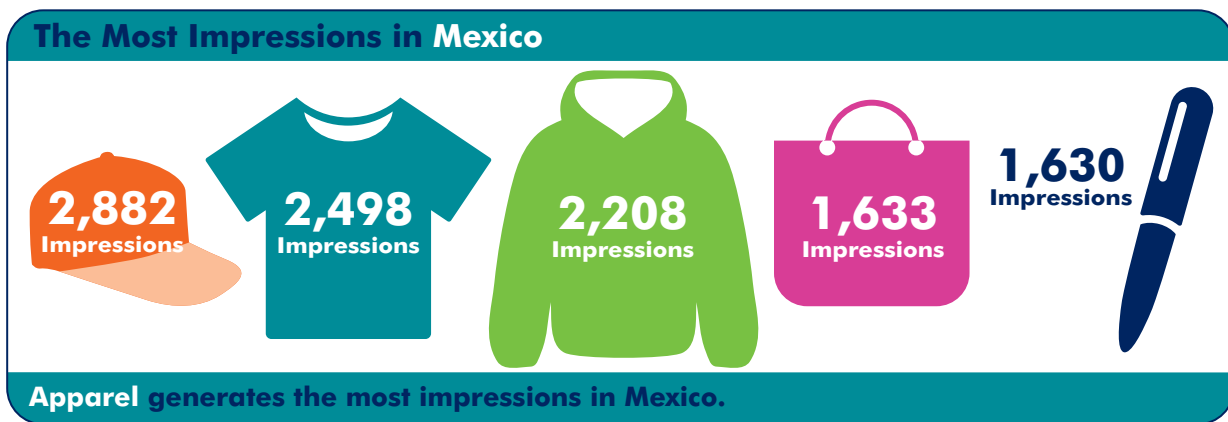
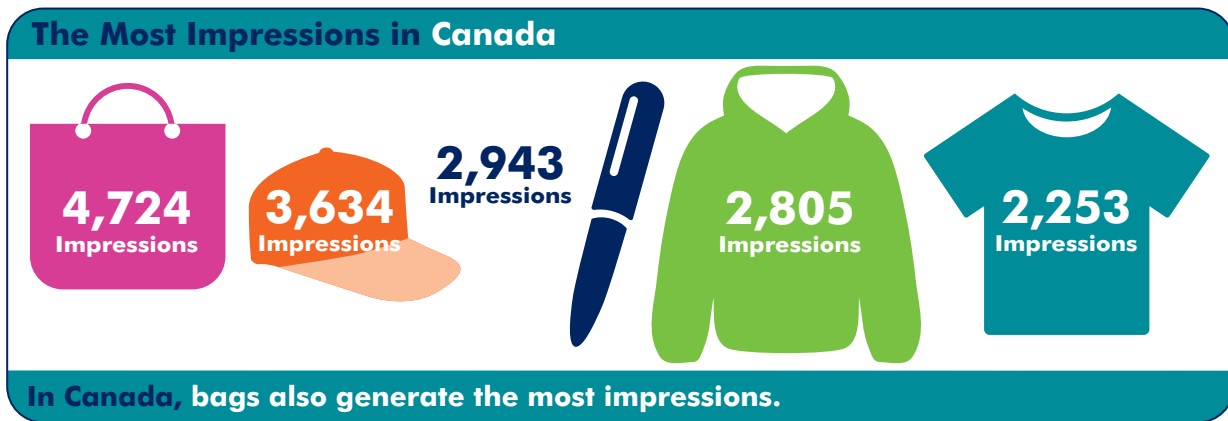
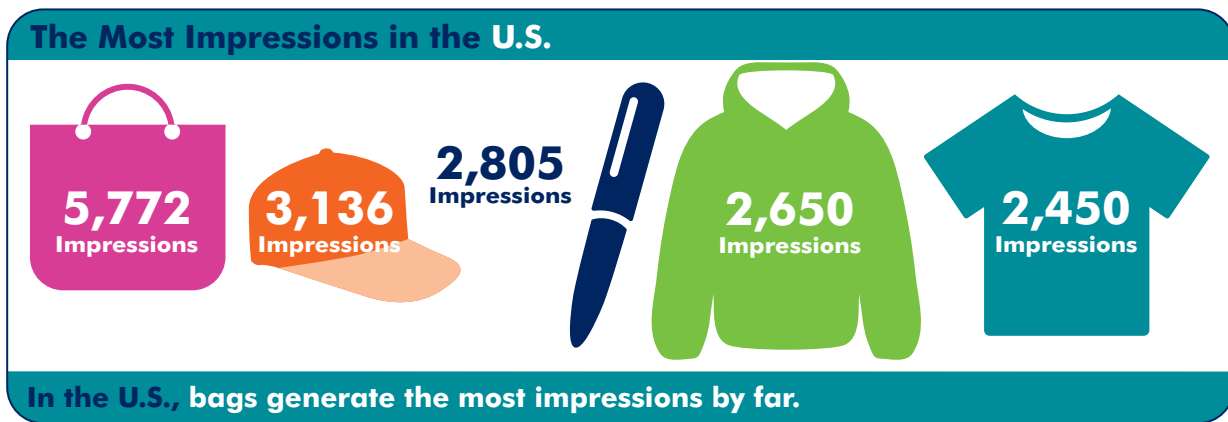
►Section Three

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.

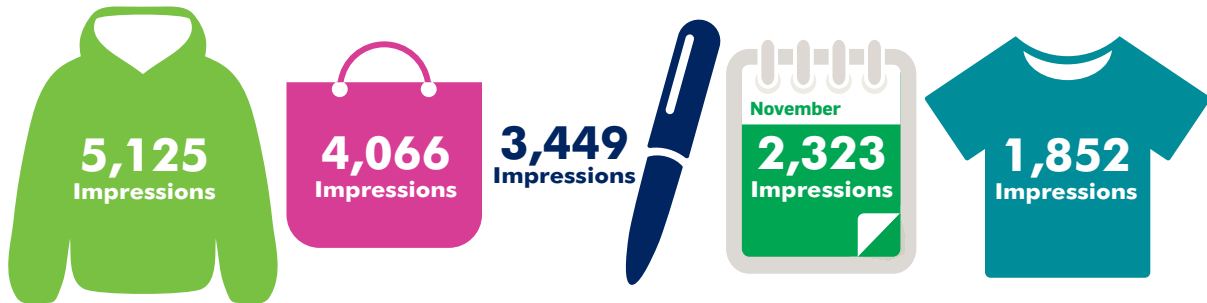
The accompanying charts illustrate the top five products, by country, that deliver the most impressions:



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.

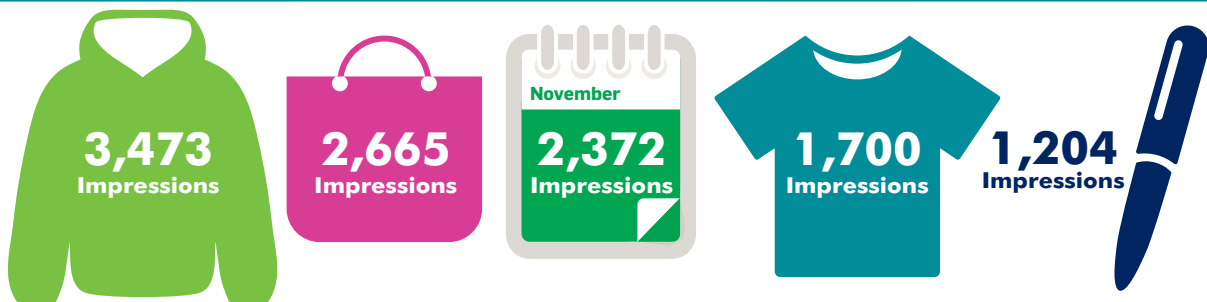
Items that create the fewest impressions tend to be those intended mostly for one person, such as health and safety items and USB drives. The value of these items is more in the connection they make with the user than the total number of impressions generated.

The Most Impressions in London



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

The Most Impressions in Paris



Similar to London, the incidence of owning promotional outerwear is low, but a high number of impressions are generated.

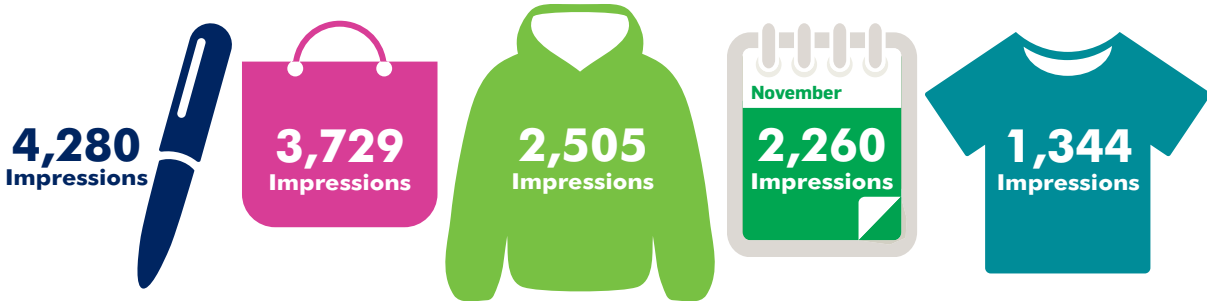
The Most Impressions in Berlin



In Berlin, writing instruments generate the most impressions by far.

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 Most Impressions in Madrid



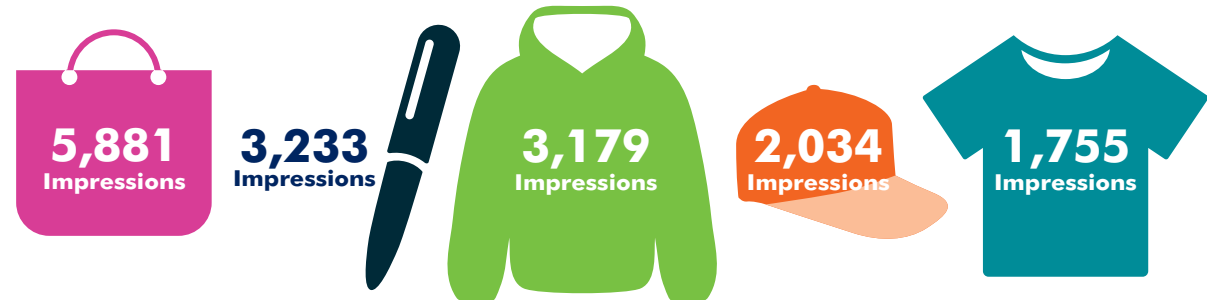
In the Madrid, writing instruments generate the most impressions.

The Most Impressions in Rome



In Rome, writing instruments also generate the most impressions by far.

The Most Impressions in Sydney



In Sydney, bags generate the most impressions.

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.



OVERALL OPINION OF ADVERTISING MEDIUMS

When asked what types of advertising they like best, **consumers under 55 prefer PROMOTIONAL PRODUCTS.**

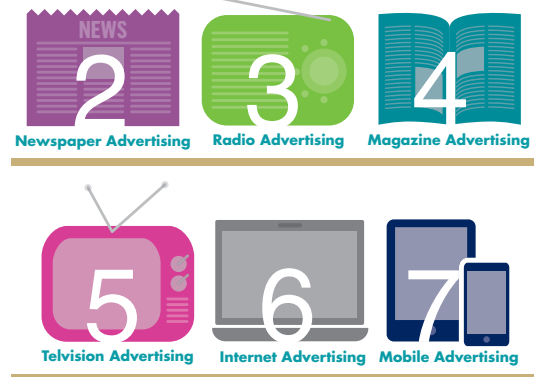


Ranking from best to worst

PROMOTIONAL PRODUCTS are the **most highly regarded form of advertising.**



PROMOTIONAL PRODUCTS



Ranking from best to worst

The World Remembers

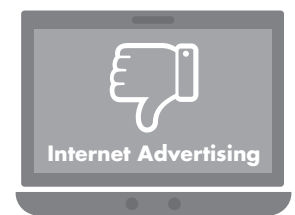


85%
remember
the advertiser
worldwide.

Recall is highest for apparel items, as 85% recall the advertiser that gave them a shirt or hat.

Deciding between **PROMOTIONAL PRODUCTS** or Internet advertising?

Consider this...



Consumers are nearly 2.5x more likely to have a positive opinion of promotional products compared to Internet advertising.