
2009 ASI Power Summit Report
End-User Buying Habits Study

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Background:

The 2009 ASI Power Summit survey was conducted in August, 2009. Its purpose was to quantify end-buyer perceptions about their expectations for promotional product spending vs. other forms of advertising, the effect of the current economy on marketing spending in general and promotional product spending in particular, types of programs that use promotional products, and promotional products they use for those programs.

Where appropriate, results of this study have been compared with the 2007 ASI Power Summit End Buyer Study.

Conclusions:

- **Promotional Products Second Only To Internet As Most Effective.** The Internet is considered the most effective advertising medium overall by 72% of end-buyers, with promotional products second (64%). Promotional product programs that are combined with other forms of advertising, such as the Internet and B-to-B magazines, may make the most effective strategy possible.
- **Creativity Beats Price and Product Recommendations.** Even in a challenging economic environment, creativity is the number one trait end-buyers look for in distributors by a 2:1 margin. Over one-third (34%) listed it as the top trait, while only 15% said “price recommendations” is the most important trait; and 14% said “product recommendations” is the most important.
- **End-Buyer Attitudes on ROI Drive Spending.** Nearly one-half (48%) of respondents indicated that promotional products are expected to deliver positive Return on Investment (ROI). Educating end buyers about the effectiveness of promotional products is critical. Those who have the highest expectations for promotional products ROI will spend significantly more money on them this year than those who believe promotional products are simply “nice to have but don’t add real value.”
- **Customer Programs Are Key.** Business gifts are the most commonly used promotional product, cited by over two-thirds (69%) of respondents; customer retention/loyalty programs are second, as 53% of respondents use them; and customer acquisition programs are third, as 48% of respondents use them. While spending is down this year on employee incentive and recognition programs, spending is flat for customer programs, indicating that more end-buyers are focusing on these types of programs.
- **Shirts Are Tops.** Shirts are perceived as the most effective in reaching program goals, as nearly one-half (47%) cited shirts as among their most effective products. Shirts are particularly effective for employee incentive programs or trade promotions.



Detailed Findings:

I. 2009 Results

Do you anticipate your marketing spending for the second half of 2009 will be greater, lower or about the same as it was in the second half of 2008?

- Nearly one-half (47%) felt marketing spending during the second half would be about the same as it was in 2008.
- Manufacturing was the most conservative segment, with 41% anticipating lower spending overall.
- Nearly one-half (48%) of the Education segment anticipated an increase in spending, significantly higher than any other segment.
- More than one-half (53%) of event planners anticipated spending would be the same as last year for the last half of 2009.

Anticipated Market Spend	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Greater	22.0%	19.4%	15.6%	48.0%	27.5%	17.4%
Lower	30.8%	32.3%	40.6%	20.0%	35.0%	28.3%
About the same	47.3%	48.4%	43.8%	32.0%	37.5%	54.3%

What will your overall marketing spending be in 2009? Please include all forms of marketing, such as print, broadcast outdoor and Internet.

- Those who increased their spending had larger marketing budgets than those who decreased their marketing spending.

Average Annual Marketing Spend

Size of Company	Increased	Decreased	Remained the Same
Small	\$41,682	\$37,470	\$44,178
Medium	\$444,425	\$132,674	\$241,345
Large	\$2,221,406	\$2,143,967	\$2,213,036

Do you anticipate your promotional product spending for the second half of 2009 will be greater, lower or about the same as it was in the second half of 2008?

- About one-half (46%) anticipated second half 2009 spending to be about the same as in 2008.

Anticipated Promotional Product Spend	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Greater	19.3%	27.4%	12.5%	36.0%	20.5%	15.6%
Lower	35.0%	30.6%	50.0%	24.0%	43.6%	33.3%
About the same	45.7%	41.9%	37.5%	40.0%	35.9%	51.1%



Overall, how has your promotional product spending changed in 2009 vs. 2008?

- Spending on promotional products will decline in 2009 vs. 2008, as 45% cited spending will be lower, while 22% anticipated an increase.
- Spending will be especially lower for the manufacturing sector, but education is expected to remain stable vs. 2008.
- According to ASI estimates, total sales of advertising specialties in 2008 were \$19.8 billion. A decline for 2009 is expected, in the range of at least 8%-12%.

Promotional Product Spending	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Increased	21.7%	21.0%	21.9%	32.0%	20.0%	21.7%
Decreased	44.5%	45.2%	53.1%	36.0%	47.5%	43.5%
Remained the same	33.8%	33.9%	25.0%	32.0%	32.5%	34.8%

Overall, how has your marketing spending changed year to date in 2009 vs. 2008?

- Nearly one-half (46%) of respondents indicated their marketing spending vs. 2008 decreased.
- Over one-quarter (28%) of Education segment respondents increased their marketing budget, the highest among any industry segment analyzed. Only 40% decreased their spending, lowest of any segment.
- Conversely, over one-half (55%) of health care and manufacturing segments (53%) decreased their marketing budget, the greatest decrease of any industry segment.
- Among those reporting a decrease in marketing spend; the average decline is 37.8%, while those reporting an increase reported 23.6%.

Overall Marketing Spend	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Increased	21.2%	24.2%	18.8%	28.0%	20.0%	13.0%
Decreased	46.0%	46.8%	53.1%	40.0%	55.0%	43.5%
Remained the same	32.9%	29.0%	28.1%	32.0%	25.0%	43.5%



II. ROI and Promotional Products

What are your expectations for promotional product spending vs. other forms of advertising?

- Nearly one-half (48%) of respondents indicated promotional products are expected to be as accountable as other forms of advertising.

Expectations for Promotional Products	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non- Profits
Promotional products are expected to deliver positive Return on Investment just as much as other forms of advertising.	48.4%	48.4%	58.1%	64.0%	52.5%	35.6%
Promotional products can't be expected to deliver a quantifiable return, but I think they do.	35.3%	37.1%	32.3%	32.0%	20.0%	35.6%
Promotional products are nice to have, but don't add much real value to our marketing mix.	16.3%	14.5%	9.7%	4.0%	27.5%	28.9%

- Those that have the highest expectations for promotional product ROI spend the most on them.

Average Annual Promotional Product Budget

Expectations for Promotional Products	Size of Company & Annual Budget		
	Small	Medium	Large
Promotional products are expected to deliver positive Return on Investment just as much as other forms of advertising.	\$23,647	\$131,112	\$256,395
Promotional products can't be expected to deliver a quantifiable return, but I think they do.	\$17,427	\$30,475	\$65,261
Promotional products are nice to have, but don't add much real value to our marketing mix.	\$5,485	\$6,250	\$44,609

Overall, how has your marketing spending changed year to date in 2009 vs. 2008?

- Nearly one-third (30%) of those that expect promotional products to deliver a positive ROI increased their budgets, double that of those with lower expectations of promotional products ROI.

Marketing Spend Change '09 v '08	Expected to deliver positive ROI	Not expected to deliver a quantifiable return, but I think they do.	Nice to have, but don't add much real value
Increased	30.4%	16.3%	4.4%
Decreased	39.2%	48.3%	61.8%
Remained the same	30.4%	35.4%	33.8%

Do you estimate your marketing spending for the second half of 2009 will be greater, lower or about the same as it was in the second half of 2008?

- Firms that expected promotional products to deliver at positive ROI were much more likely to estimate marketing spending would be greater (28%).

Anticipated Marketing Spend	Expected to deliver positive ROI	Not expected to deliver a quantifiable return, but I think they do.	Nice to have, but don't add much real value
Greater	27.7%	14.6%	4.5%
Lower	30.7%	32.6%	52.2%
About the same	41.6%	52.8%	43.3%



What types of programs does your company engage in that use promotional products?

- Those who expect advertising specialties to deliver a positive ROI use them more in five out of the seven programs studied.

Programs	Expected to deliver positive ROI	Not expected to deliver a quantifiable return, but I think they do.	Nice to have, but don't add much real value
Business gifts (thank-you gifts, PR items, holiday gifts, etc.)	71.1%	74.1%	55.2%
Customer retention/loyalty programs	61.8%	51.7%	31.3%
Customer acquisition (new businesses)	53.4%	46.9%	34.3%
Trade shows	45.1%	45.6%	35.8%
Employee incentive programs (productivity, safety, attendance, sales goals, etc.)	43.1%	31.3%	20.9%
Recognition programs (employee service, team or individual performance, etc.)	35.3%	32.0%	38.8%
Trade promotions (dealers, distributors, etc.)	23.0%	16.3%	6.0%

What is your primary criterion in determining what products to select?

- Those expecting advertising specialties to deliver a positive ROI are split roughly evenly on criteria when selling a product.

Criterion	Expected to deliver positive ROI	Not expected to deliver a quantifiable return, but I think they do.	Nice to have, but don't add much real value
Return on Investment	33.8%	8.8%	13.2%
Perceived value	30.9%	55.1%	41.2%
Cost per person	26.5%	29.9%	33.8%
Other	8.8%	6.1%	11.8%

Do you typically have set measurable goals that measure the effectiveness of promotional products in your programs?

- Nearly two-thirds (64%) do not have set measurable goals for their programs.

Measurable Goals	Total	Finance/Insurance/Real Estate	Manufacturing	Education/Universities	Health/Medical/Hospitals	Non-Profits
Yes	35.9%	32.8%	43.8%	44.0%	32.5%	32.6%
No	64.1%	67.2%	56.3%	56.0%	67.5%	67.4%

- Only about one-half (51%) of those that expect positive ROI from advertising specialties have measurable goals to gauge their effectiveness.

Measurable Goals	Expected to deliver positive ROI	Not expected to deliver a quantifiable return, but I think they do.	Nice to have, but don't add much real value
Yes	51.0%	21.8%	20.6%
No	49.0%	78.2%	79.4%



What types of promotional products/incentives do you find are the most effective in reaching program goals?

- Shirts are perceived as the most effective in reaching program goals, as nearly one-half (47%) cited shirts as among their most effective products.
- The 2008 ASI Ad Impressions Study showed bags to be the most cost-effective promotional product. They're rated highly by end-buyers as well, with 39% citing them as effective.

Rank	Products	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non- Profits
1	Shirts	47.4%	41.0%	65.6%	48.0%	25.0%	34.8%
2	Writing instruments	42.1%	45.9%	46.9%	44.0%	35.0%	34.8%
3	Bags	38.5%	26.2%	46.9%	60.0%	35.0%	39.1%
4	Computer-related	35.3%	26.2%	43.8%	28.0%	37.5%	28.3%
5	Desk/office/business accessories	35.3%	34.4%	43.8%	28.0%	35.0%	26.1%
6	Calendars	32.9%	37.7%	50.0%	24.0%	32.5%	32.6%
7	Gift cards	30.5%	39.3%	43.8%	28.0%	32.5%	21.7%
8	Food gifts	27.4%	31.1%	31.3%	24.0%	37.5%	19.6%
9	Magnets	26.9%	31.1%	18.8%	24.0%	32.5%	17.4%
10	Caps/headwear	23.8%	23.0%	34.4%	32.0%	10.0%	19.6%

Products	Human resources	Marketing	Sales	Public Relations	Event Planning	Purchasing
Shirts	42.1%	48.9%	44.1%	45.2%	52.4%	57.1%
Writing instruments	31.6%	41.6%	40.7%	48.4%	52.4%	47.6%
Bags	31.6%	44.5%	32.2%	38.7%	57.1%	52.4%
Computer-related	36.8%	37.2%	32.2%	25.8%	52.4%	33.3%
Desk/office/business accessories	42.1%	35.0%	35.6%	35.5%	42.9%	38.1%
Calendars	26.3%	27.7%	45.8%	38.7%	57.1%	28.6%
Gift cards	36.8%	29.2%	35.6%	38.7%	47.6%	14.3%
Food gifts	31.6%	27.0%	27.1%	38.7%	33.3%	14.3%
Magnets	15.8%	21.2%	40.7%	25.8%	19.0%	33.3%
Caps/headwear	21.1%	24.8%	27.1%	9.7%	33.3%	47.6%

Gender

- Females are far more likely than males to rate bags, gift cards and food gifts as effective, while males are more likely to rate caps/headwear, clocks/watches and magnets as effective.

Products	Males	Females	Percentage Difference
Bags	30.6%	47.1%	35.0%
Caps/headwear	31.1%	17.0%	82.9%
Clocks/watches	18.7%	6.3%	196.8%
Gift cards	25.8%	35.4%	27.1%
Food gifts	23.0%	31.6%	27.2%
Magnets	31.1%	22.0%	41.4%



Please rate the effectiveness of each of the advertising mediums below.

- The Internet is considered the most effective advertising medium overall by 72%, with promotional products second (64%).
- The perception of effectiveness of all advertising mediums is lower in 2009 than in 2007.
 - However, only Internet and promotional products show less than a double-digit decline.
- Health/Medical/Hospitals consider promotional products most effective, despite recent legislative changes.

Effectiveness of Advertising Mediums (Very/Somewhat Effective)

Advertising Mediums	2009 Total	2007 Total	Change	2009 Finance/Insurance/Real Estate	2009 Manufacturing	2009 Education/Universities	2009 Health/Medical/Hospitals	2009 Non-Profits
Internet	72.0%	75%	-3%	76.2%	70.0%	70.8%	66.7%	68.9%
Promotional Products	64.4%	72%	-8%	62.7%	58.1%	60.8%	69.3%	60.0%
Business-to-Business Magazines	48.9%	51%	-14%	43.4%	71.0%	50.0%	46.2%	31.1%
Newspapers	37.7%	66%	-17%	47.5%	38.8%	47.8%	43.6%	40.0%
Radio	37.6%	52%	-14%	45.6%	26.7%	41.7%	30.8%	44.2%
Network TV	36.6%	51%	-17%	40.4%	45.2%	45.9%	30.8%	44.4%
Cable Network TV	33.9%	50%	-12%	34.5%	43.3%	45.4%	30.8%	44.5%
Consumer & Sunday Magazines	32.1%	44%	-12%	37.3%	33.3%	34.8%	28.2%	33.3%
Outdoor	26.4%	31%	-13%	28.6%	32.3%	41.6%	20.5%	24.4%
Spot TV	18.4%	38%	-12%	14.1%	19.4%	16.7%	18.0%	15.6%
Syndicated TV	17.0%	25%	-10%	12.3%	29.0%	20.8%	15.4%	15.6%
Spanish Language Media	14.9%	32%	-15%	16.1%	22.6%	16.7%	12.9%	15.6%

- Among those who expect promotional products to deliver a positive ROI, promotional products are the most effective.

Effectiveness of Advertising Mediums (Very/Somewhat Effective)

Advertising Mediums	Expected to deliver positive ROI	Not expected to deliver a quantifiable return, but I think they do.	Nice to have, but don't add much real value
Promotional Products	77.5%	59.8%	35.4%
Internet	69.9%	75.3%	73.9%
Business-to-Business Magazines	45.0%	55.0%	46.9%
Newspapers	39.7%	35.5%	35.4%
Network TV	38.1%	38.7%	28.1%
Radio	37.9%	41.0%	28.1%
Consumer & Sunday Magazines	31.0%	34.3%	29.7%
Outdoor	30.2%	23.8%	19.1%
Cable Network TV	29.6%	41.6%	31.3%
Syndicated TV	20.0%	16.2%	9.5%
Spot TV	19.9%	17.6%	14.1%
Spanish Language Media	18.0%	13.9%	7.9%



- Females are more likely than males to rate promotional products as effective, with nearly three-quarters (73%) of females vs. 56% of males rating them effective.
- In general, females rate media that needs to be read (magazines, newspapers, etc.) more effective than males rate it.

**Effectiveness of Advertising Mediums
(Very/Somewhat Effective)**

Advertising Mediums	Males	Females	Percentage Difference
Internet	69.6%	74.3%	6.3%
Promotional Products	56.4%	73.4%	23.2%
Business-to-Business Magazines	46.5%	51.0%	8.8%
Newspapers	36.0%	40.1%	10.2%
Network TV	34.9%	38.5%	9.4%
Cable Network TV	34.5%	33.5%	3.0%
Radio	34.0%	39.8%	14.6%
Consumer & Sunday Magazines	27.7%	37.0%	25.1%
Outdoor	24.7%	26.6%	7.1%
Spot TV	19.8%	16.6%	19.3%
Syndicated TV	17.7%	15.7%	12.7%
Spanish Language Media	12.9%	16.5%	21.8%



III. New Sales Opportunities

What types of programs does your company engage in that use promotional products?

- Business gifts are the most commonly used promotional product, cited by over two-thirds (69%) of respondents.
- Customer retention/loyalty programs are second, as 53% of respondents use them.
- Overall, there are fewer programs using promotional products vs. 2007. Trade shows and employee programs are the hardest hit.

Programs	2009 Total	2007 Total	Percentage Difference
Business gifts (thank-you gifts, PR items, holiday gifts, etc.)	69.2%	73%	5.2%
Customer retention/loyalty programs	52.7%	52%	1.3%
Customer acquisition (new businesses)	47.7%	47%	1.5%
Trade shows	43.7%	48%	9.0%
Employee incentive programs (productivity, safety, attendance, sales goals, etc.)	35.6%	41%	13.2%
Recognition programs (employee service, team or individual performance, etc.)	34.6%	39%	11.3%
Trade promotions (dealers, distributors, etc.)	17.9%	20%	10.5%

- Business gifts continue to be the most frequent use of promotional products (69%), particularly in Health Care (78%), Finance (77%) and Manufacturing (75%).

Programs	2009 Finance/Insurance/Real Estate	2009 Manufacturing	2009 Education/Universities	2009 Health/Medical/Hospitals	2009 Non-Profits
Business gifts (thank-you gifts, PR items, holiday gifts, etc.)	77.4%	75.0%	40.0%	77.5%	65.2%
Customer retention/loyalty programs	58.1%	50.0%	44.0%	52.5%	30.4%
Customer acquisition (new businesses)	56.5%	37.5%	44.0%	57.5%	28.3%
Trade shows	38.7%	75.0%	36.0%	30.0%	37.0%
Employee incentive programs (productivity, safety, attendance, sales goals, etc.)	29.0%	43.8%	40.0%	47.5%	26.1%
Recognition programs (employee service, team or individual performance, etc.)	35.5%	37.5%	28.0%	47.5%	45.7%
Trade promotions (dealers, distributors, etc.)	14.5%	46.9%	12.0%	12.5%	2.2%



What types of service beyond procurement do you look for from your typical source of promotional products?

- Over one-third (34%) look for creativity from distributors. The education market in particular is looking for creativity.
- Nonprofits and finance are particularly concerned about price recommendations, with 19% and 21%, respectively citing this service.

Services	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non- Profits
Creativity	33.9%	35.5%	34.4%	44.0%	20.0%	28.3%
Price recommendations	15.0%	19.4%	12.5%	16.0%	17.5%	21.7%
Product recommendations	14.1%	14.5%	25.0%	4.0%	15.0%	13.0%
Decoration/imprinting of items	11.2%	4.8%	12.5%	8.0%	7.5%	10.9%
Return on Investment metrics	11.0%	8.1%	6.3%	8.0%	20.0%	10.9%
Access to new products	10.5%	12.9%	6.3%	12.0%	15.0%	8.7%
Other	4.3%	4.8%	3.1%	8.0%	5.0%	6.5%

What is your primary criterion in determining what products to select?

- Perceived value still the most important criteria by far, even out weighing cost per person and ROI.

Criterion	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non- Profits
Perceived value	41.0%	45.2%	50.0%	28.0%	40.0%	28.3%
Cost per person	28.8%	25.8%	15.6%	28.0%	35.0%	50.0%
Return on Investment	21.9%	21.0%	25.0%	32.0%	20.0%	10.9%
Other	8.3%	8.1%	9.4%	12.0%	5.0%	10.9%

To the best of your knowledge, what other areas/departments in your company purchase promotional products?

- Over one-third (35%) of respondents indicated that no other departments beyond the one they are in purchased promotional products.
- Marketing was noted most frequently as purchasing promotional products, as over one-quarter (27%) cited it.
- Each industry segment had at least one department cited as purchasing promotional products in higher proportion to the others. Respondents in the Finance/Insurance/Real Estate segment cited Sales 23% of the time, as did those in Manufacturing 28% of the time. Participants in the Education and Nonprofit segments noted Human Resources 28% and 24%, respectively.

Departments	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non- Profits
None	34.8%	32.8%	21.9%	28.0%	42.5%	34.8%
Marketing	27.1%	21.3%	28.1%	28.0%	32.5%	13.0%
Sales	16.1%	23.0%	28.1%	4.0%	10.0%	4.3%
Human resources	10.8%	13.1%	15.6%	28.0%	7.5%	23.9%
Operations	7.2%	3.3%	6.3%	4.0%	7.5%	19.6%
Other	4.1%	6.6%	0.0%	8.0%	0.0%	4.3%



Promotional Products Used by Type of Programs

The table below shows the type of programs that use promotional products, and the product categories most commonly used.

- Among those that engage in employee incentive programs or trade promotions, they use shirts a particularly great amount of time, 60% and 63% for each program, respectively.
- Customer acquisition and trade show program participants also use a particularly high amount of writing instruments, 47% and 48%, respectively.
- While those that do trade promotions in general use more types of promotional products, they are more likely to include bags (48%) than other types of programs.

Products	Employee incentive programs	Customer retention/ loyalty programs	Customer acquisition	Business gifts	Trade shows	Trade promotions	Recognition programs
Shirts (T-shirts, polos, button-downs, etc.)	59.9%	50.0%	53.2%	53.1%	55.2%	62.7%	55.9%
Writing instruments	42.9%	46.4%	47.3%	45.5%	48.1%	44.0%	42.0%
Bags	43.5%	40.1%	41.3%	40.7%	41.4%	48.0%	44.1%
Desk/office/business accessories	44.9%	41.0%	43.8%	40.3%	44.2%	45.3%	44.8%
Computer-related products	42.9%	39.2%	39.3%	38.6%	48.6%	50.7%	42.7%
Calendars	38.1%	40.1%	35.8%	39.3%	38.1%	41.3%	38.5%
Gift cards	39.5%	40.1%	34.8%	34.5%	34.3%	41.3%	38.5%
Food gifts	31.3%	32.9%	32.3%	32.1%	29.3%	28.0%	35.0%
Magnets	29.3%	34.7%	29.4%	28.3%	24.3%	26.7%	29.4%
Caps/headwear	32.7%	27.9%	27.4%	28.6%	28.7%	36.0%	32.2%
Recognition awards/trophies/jewelry	31.3%	21.6%	20.4%	22.1%	23.2%	30.7%	37.8%
Electronics	29.9%	25.2%	24.4%	21.0%	25.4%	40.0%	23.8%
Textiles (umbrellas, flags, banners, blankets, etc.)	22.4%	21.2%	21.9%	22.4%	23.2%	29.3%	23.1%
Books/cards/postcards/stationery/ gift wrap	17.0%	23.4%	19.4%	21.0%	21.0%	28.0%	23.8%
Glassware/ceramics (includes mugs)	22.4%	17.6%	18.4%	20.3%	19.3%	24.0%	21.0%
Other apparel (jackets, slacks, ties, etc.)	23.8%	21.2%	20.9%	20.7%	23.8%	33.3%	23.1%
Buttons/badges/ribbons/stickers/ decals/emblems/transfers	21.8%	18.9%	15.4%	17.6%	14.9%	24.0%	24.5%
Automotive accessories (includes keytags)	19.7%	21.2%	16.4%	15.9%	16.6%	20.0%	16.1%
Housewares/tools (flashlights, knives, corkscrews, drills, etc.)	18.4%	17.6%	17.9%	16.6%	16.0%	21.3%	18.2%
Sporting goods/leisure products	15.6%	15.8%	15.9%	16.2%	17.7%	22.7%	16.1%
Clocks/watches	24.5%	18.5%	13.4%	15.2%	16.0%	30.7%	23.8%
Personal/pocket-purse products (includes sunglasses)	15.6%	17.6%	13.9%	13.4%	11.6%	20.0%	16.8%
Health and safety products (first-aid kits, etc.)	18.4%	14.0%	15.4%	13.8%	13.8%	14.7%	15.4%
Games/toys/playing cards	15.0%	13.1%	13.4%	12.8%	14.9%	18.7%	15.4%
Balloons	7.5%	7.2%	7.0%	6.6%	6.6%	12.0%	9.1%



IV. Methodology

On August 14, 2009, email survey invitations went out from *Successful Promotions* magazine to a sample of *Successful Promotions Trend Report* recipients. In total, 13,220 survey invitations were sent, with one reminder notification. There were 313 completed responses. Incentive to take the survey was a drawing for an American Express gift card worth \$250. Further, respondent sample was purchased from Zoomerang, resulting in 111 more responses. In total there were 414 completed surveys.

Respondents were screened to make sure they met the criteria of: Buy/recommend/approve/authorize promotional products for their company.

V. Respondent Demographics

Department	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Human resources	4.6%	3.2%	0.0%	12.5%	15.4%	13.0%
Marketing	33.4%	35.5%	65.6%	25.0%	23.1%	15.2%
Sales	14.4%	32.3%	12.5%	12.5%	7.7%	4.3%
Public Relations	7.5%	11.3%	3.1%	16.7%	7.7%	15.2%
Event Planning	5.0%	0.0%	0.0%	4.2%	0.0%	13.0%
Advertising	3.4%	1.6%	0.0%	0.0%	0.0%	0.0%
Purchasing	4.8%	3.2%	9.4%	4.2%	0.0%	8.7%
Other	26.9%	12.9%	9.4%	25.0%	46.2%	30.4%

Company Size by Employee	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Less than 10	36.3%	36.1%	15.6%	16.0%	30.0%	41.3%
11-99	26.7%	18.0%	37.5%	28.0%	27.5%	28.3%
100-499	18.1%	21.3%	28.1%	40.0%	20.0%	17.4%
500 or more	18.9%	24.6%	18.8%	16.0%	22.5%	13.0%

Age	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Under 25	4.3%	1.6%	6.3%	8.0%	7.5%	6.5%
25-34	16.9%	17.7%	18.8%	12.0%	10.0%	13.0%
35-44	28.1%	27.4%	34.4%	40.0%	25.0%	21.7%
45-54	29.3%	32.3%	28.1%	20.0%	37.5%	23.9%
55-64	17.1%	17.7%	9.4%	16.0%	12.5%	23.9%
65 or over	4.3%	3.2%	3.1%	4.0%	7.5%	10.9%

Gender	Total	Finance/Insurance/ Real Estate	Manufacturing	Education/ Universities	Health/Medical/ Hospitals	Non-Profits
Male	49.9%	58.3%	59.4%	44.0%	60.0%	45.7%
Female	50.1%	41.7%	40.6%	56.0%	40.0%	54.3%



VI. Appendix

- Compared to the 2007 study, bags are significantly up, from 31% to 39%, while desk/office/business accessories fell from 41% to 35%.

Top Promotional Products

Products	2009 Total	2007 Total	2009 Finance/ Insurance/ Real Estate	2009 Manufacturing	2009 Education/ Universities	2009 Health/Medical/ Hospitals	2009 Non-Profits
Shirts (T-shirts, polos, button-downs, etc.)	47.4%	49%	41.0%	65.6%	48.0%	25.0%	34.8%
Writing instruments	42.1%	46%	45.9%	46.9%	44.0%	35.0%	34.8%
Bags	38.5%	31%	26.2%	46.9%	60.0%	35.0%	39.1%
Computer-related products	35.3%	41%	26.2%	43.8%	28.0%	37.5%	28.3%
Desk/office/business accessories	35.3%	29%	34.4%	43.8%	28.0%	35.0%	26.1%
Calendars	32.9%	26%	37.7%	50.0%	24.0%	32.5%	32.6%
Gift cards	30.5%	32%	39.3%	43.8%	28.0%	32.5%	21.7%
Food gifts	27.4%	32%	31.1%	31.3%	24.0%	37.5%	19.6%
Magnets	26.9%	24%	31.1%	18.8%	24.0%	32.5%	17.4%
Caps/headwear	23.8%	27%	23.0%	34.4%	32.0%	10.0%	19.6%
Electronics	18.8%	24%	14.8%	37.5%	8.0%	17.5%	6.5%
Recognition awards/trophies/jewelry	18.8%	18%	14.8%	12.5%	24.0%	10.0%	26.1%
Textiles (umbrellas, flags, banners, blankets, etc.)	17.8%	17%	21.3%	25.0%	24.0%	7.5%	8.7%
Books/cards/postcards/stationery/gift wrap	17.3%	19%	16.4%	9.4%	20.0%	22.5%	15.2%
Glassware/ceramics (includes mugs)	17.1%	17%	13.1%	21.9%	20.0%	10.0%	19.6%
Other apparel (jackets, slacks, ties, etc.)	16.3%	17%	11.5%	18.8%	8.0%	7.5%	21.7%
Buttons/badges/ribbons/stickers/decals/emblems/transfers	15.6%	12%	4.9%	15.6%	16.0%	17.5%	17.4%
Automotive accessories (includes keytags)	14.2%	15%	23.0%	18.8%	4.0%	10.0%	4.3%
Housewares/tools (flashlights, knives, corkscrews, drills, etc.)	13.5%	13%	13.1%	15.6%	12.0%	12.5%	2.2%
Sporting goods/leisure products	12.7%	14%	18.0%	12.5%	16.0%	2.5%	8.7%
Clocks/watches	12.3%	17%	11.5%	31.3%	8.0%	10.0%	4.3%
Personal/pocket-purse products (includes sunglasses)	11.8%	10%	8.2%	15.6%	16.0%	15.0%	8.7%
Health and safety products (first-aid kits, etc.)	11.3%	11%	9.8%	9.4%	12.0%	27.5%	6.5%
Games/toys/playing cards	10.6%	12%	11.5%	12.5%	12.0%	10.0%	6.5%
Balloons	5.0%	4%	6.6%	9.4%	8.0%	2.5%	4.3%

