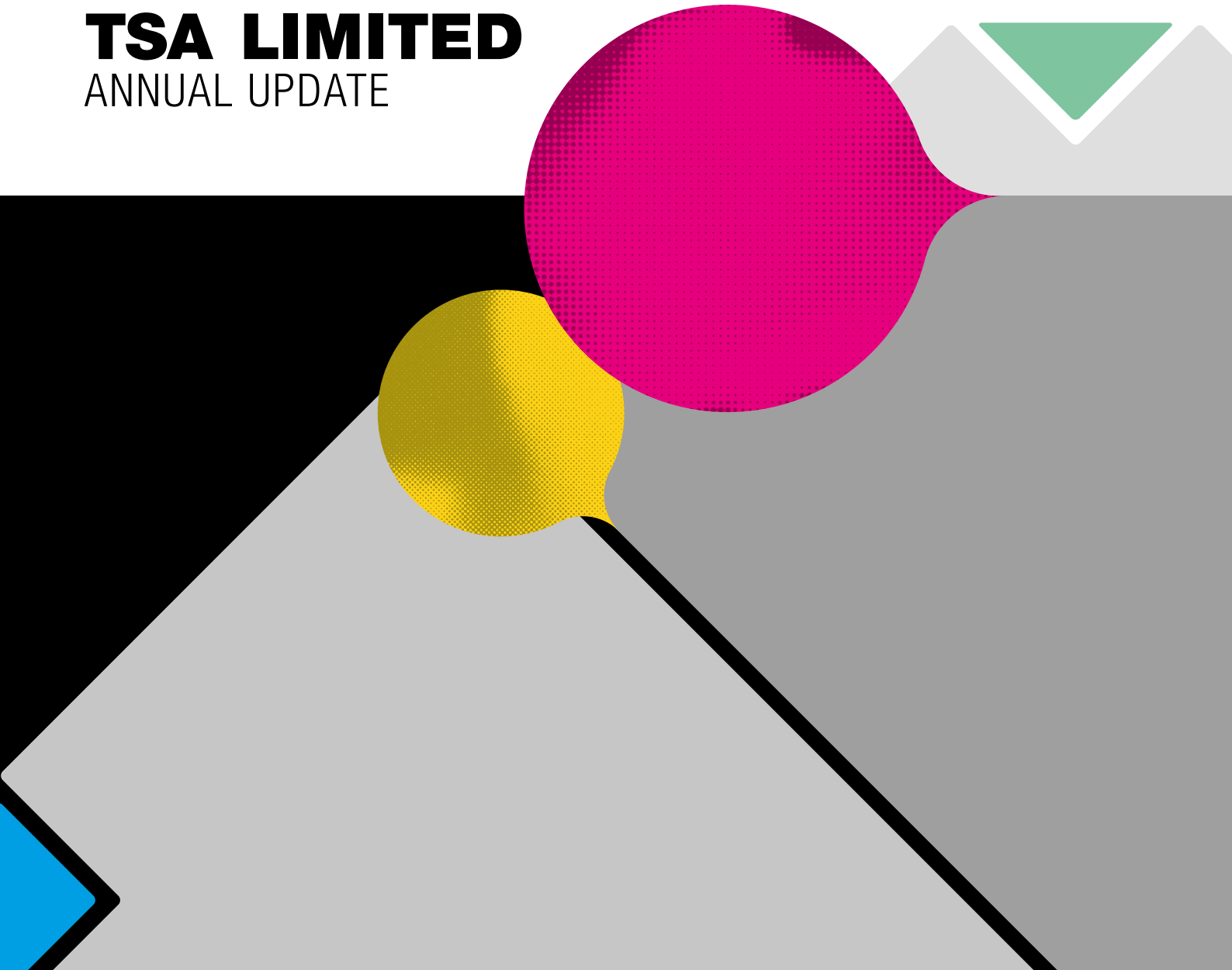




# TSA LIMITED

ANNUAL UPDATE







# THE YEAR THAT WAS...

**In a world as vibrant, courageous and resilient as the paper, print and mail industries, there is no such thing as ‘another’. Each year I spend working with our membership I am challenged with new adventures and I wouldn’t have it any other way – the TSA team remains what it always said it would be – responsive to our members’ needs and to that end we keep growing, diversifying and never sitting still. It makes the ride so much more enjoyable.**

**We started the TSA journey in 2012 with a single campaign, Two Sides, to promote a then \$7.5 billion industry. The budget was less than \$40,000 and we had only six member companies – our backs were certainly against it. When I look through the years and the activities at where we came from to today it is almost unimaginable how the campaigns are now holding senior Government Ministers to account for consumer legislative amendment and to ensure the protection of an important industry, to sitting before a panel of six ACCC lawyers answering relentlessly fired questions one after the other to protect our industries future, to staring down the barrel of a Channel 7 live news cross telling 1.2 million Australians that they are right in preferring print and mail over other channels.**

Our results in engagement of the industry are the biggest success story, with what started at six is now over one hundred member companies, encompassing two countries, 70% of the employees of our industry and 43% of our members are actively engaging with us each month.

We confidently march into corporate offices, the ACCC, Government and more, demanding equity and change for what is the country’s largest manufacturing employer.

In seven years we have built three industry influencing campaigns, leveraging with international bodies to reduce duplication to deliver campaigns to prevent greenwashing and ensure the ACCC’s Greenwashing Guidelines be more than a statement piece.

With VoPP, we have delivered a trans-Tasman campaign moving the focus of print as a manufacturing commodity and redefined an entire industry in our positioning of print, and now mail, as contemporary and relevant media channels.

Most recently we developed a national advocacy campaign, Keep Me Posted, calling on Australian’s right to choose how they receive their bills and statements when they prefer paper, print and mail, engaging yet a wider audience.

We recognised support needed to come from a wider scope than just our members and have built a ‘coalition of the willing’, joining together with industry lobbyists, trade unions, community groups and most critically every day Aussies and Kiwis to bring a voice

to our industry. The machinations and encouragement to bring all parties to a common table has not been undertaken as successfully before, yet TSA has earned respect through delivering what we said we would and created common-ground across what at times are enemy lines.

As an industry association, we are focused on ‘how to improve’ regardless of obstacles or roadblocks, we do what we say we will and in keeping with the mate-ship of an industry that doesn’t take itself too seriously, we also enjoy the journey.

There may be industries out there with less challenges than ours, however no industry holds the same greatness, endurance and has the ability to band together to deliver true industry reform on the smallest of budgets and in the most difficult of climates than ours.

We started because our industry was losing volume due to erroneous environmental criticism. Along with your support and assistance, we have successfully reduced the incidence and impact of this in Australia and New Zealand.

As print volumes continued to be challenged by new emerging technologies, we redirected our focus and with a growing membership base, moved on to promoting our wonderful paper and print channel as a relevant and important part of the media and marketing mix.

We can’t rest on this, as our industry needs and deserves so much more promotion and awareness from media buyers, advertisers, Government and community. We commit to remaining agile and energetic in order to address the ever changing landscape our industry faces over the next 12 months and beyond.

I thank you all for your Membership throughout the 2016 year and into the next; without your investment, passion and involvement we would be nothing more than six members on the leanest of budgets. This report provides you an overview of what we’ve achieved with you over the past twelve months and we look forward to achieving much much more with you in the year ahead and beyond with the renewed focus on packaging and direct mail into 2018.

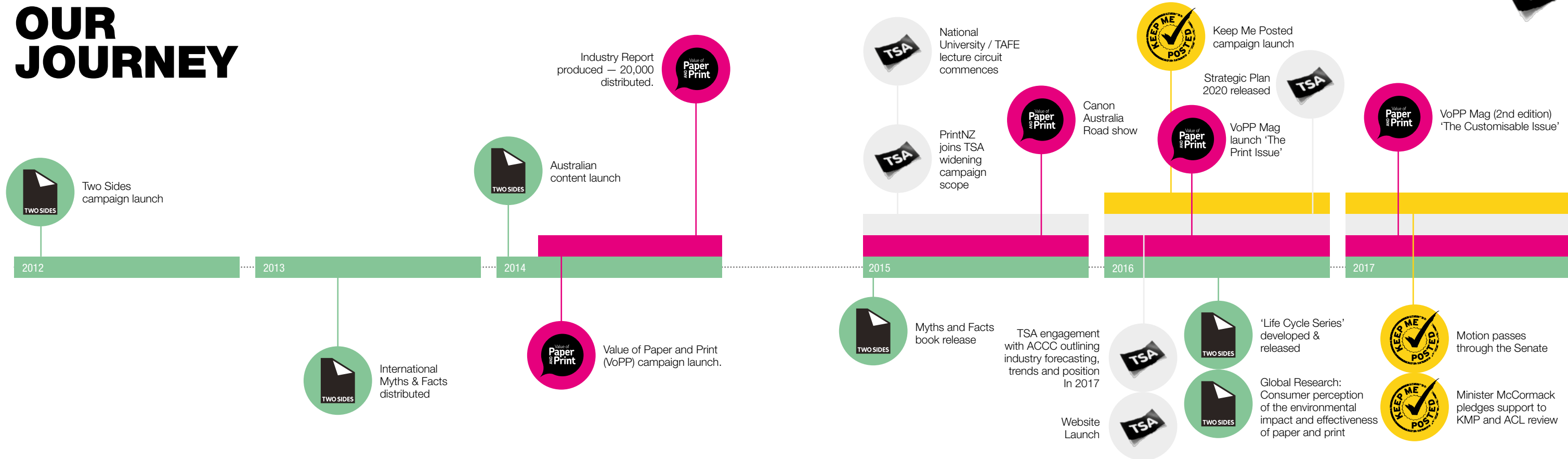
Keep fighting the good fight, laugh when you can and remember our industry is recognised for its operational excellence, as being one of oldest most respected crafts and delivers one of the highest returns on investment for marketers.

**As Porsche told millions across the world, “Print isn’t dead, it just needed a little CPR.”**





# OUR JOURNEY

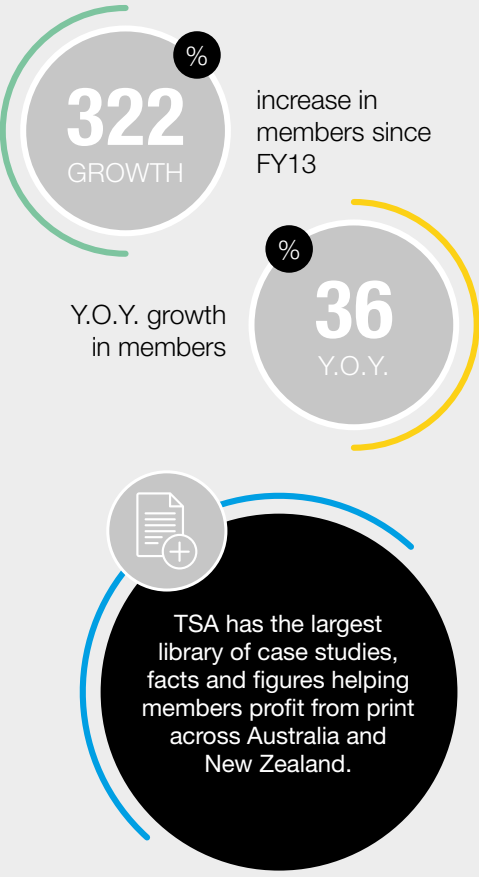
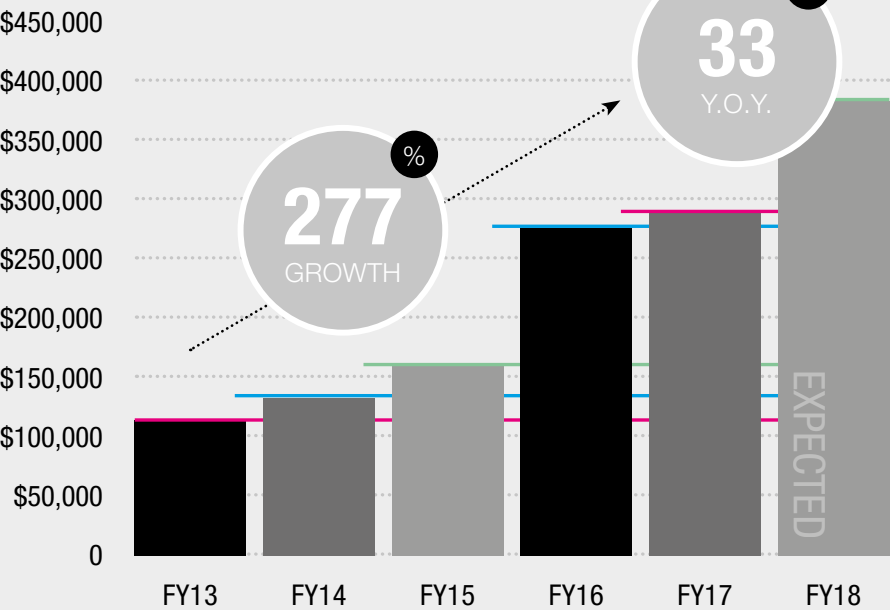


## OUR PERFORMANCE

### THANK YOU TO ALL OUR MEMBERS

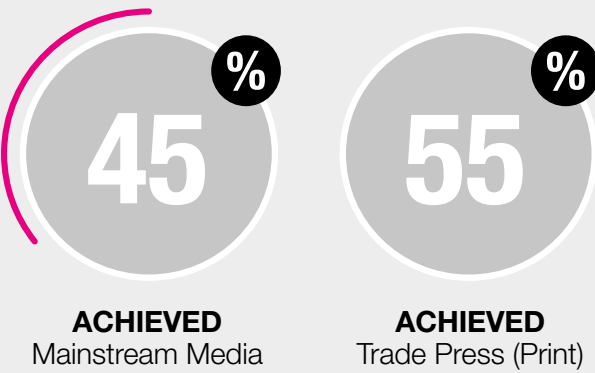
Your dedicated support has allowed us to develop a united voice that communicates the industry's strengths to the marketplace.

### ASSOCIATION INVESTMENT

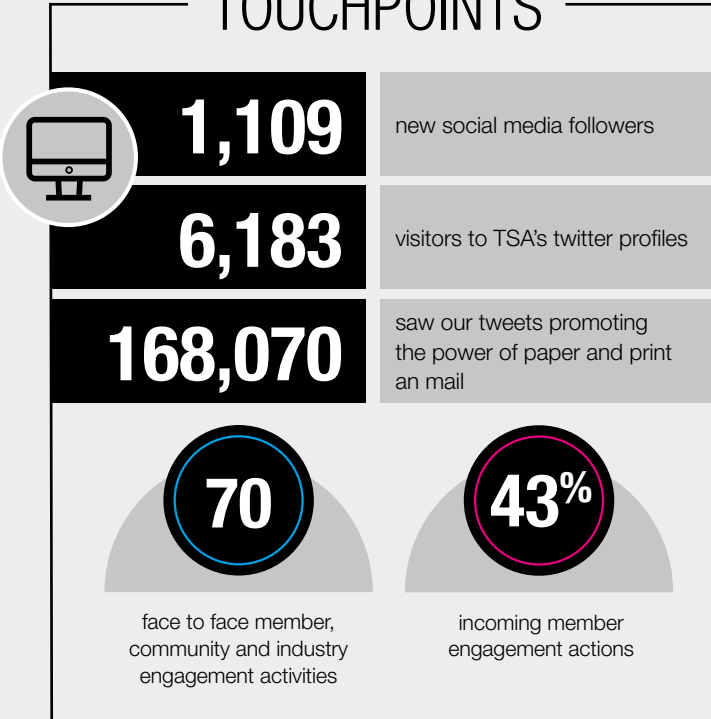


## MEDIA COVERAGE

TSA is committed to raising the national media profile of the paper, print and mail industries and we have had great results gaining media coverage in the mainstream and marketing media channels. Our focus for the upcoming year is to continue bringing the conversation promoting our relevance and value beyond the industry, to Australian and New Zealand marketers and agencies. We have a target for FY18 of 60% mainstream media coverage and 40% trade press coverage.



## TOUCHPOINTS



LOBBYING

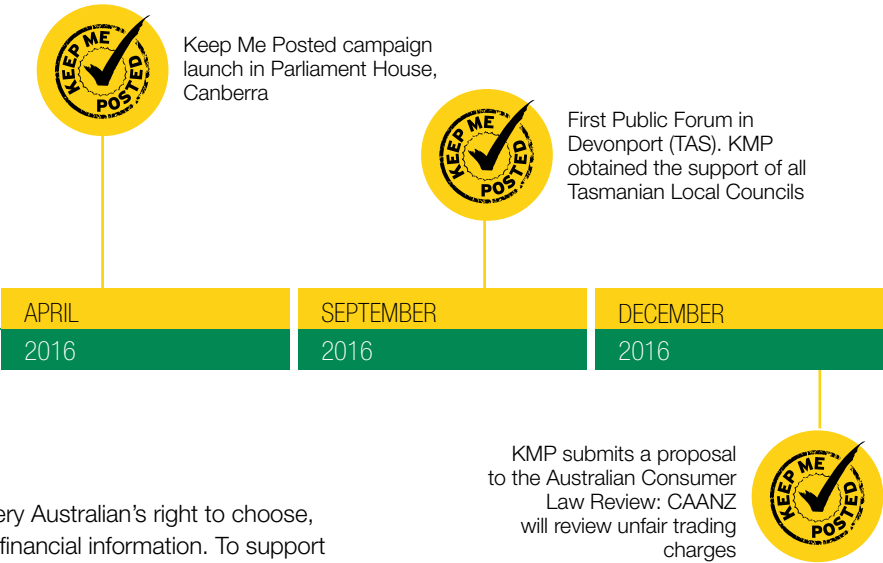
Bringing Paper and Print onto the agenda

CAMPAIGN MILESTONES

Keep Me Posted is a campaign advocating every Australian’s right to choose, free of charge and how they receive important financial information. To support its purpose, Keep Me Posted has gathered support from local, state and federal politicians, community groups and members, attracting a large media presence along the way.

The campaign has reached some critical milestones with a Private Member’s motion and a Private Member’s bill being introduced in the House of Representatives, and most notably, a Keep Me Posted motion has been passed by the Senate with an unprecedented majority.

The campaign will continue to work with all sides of Government to support legislative change and provide a representative voice to Australians who prefer paper, print and mail communications.



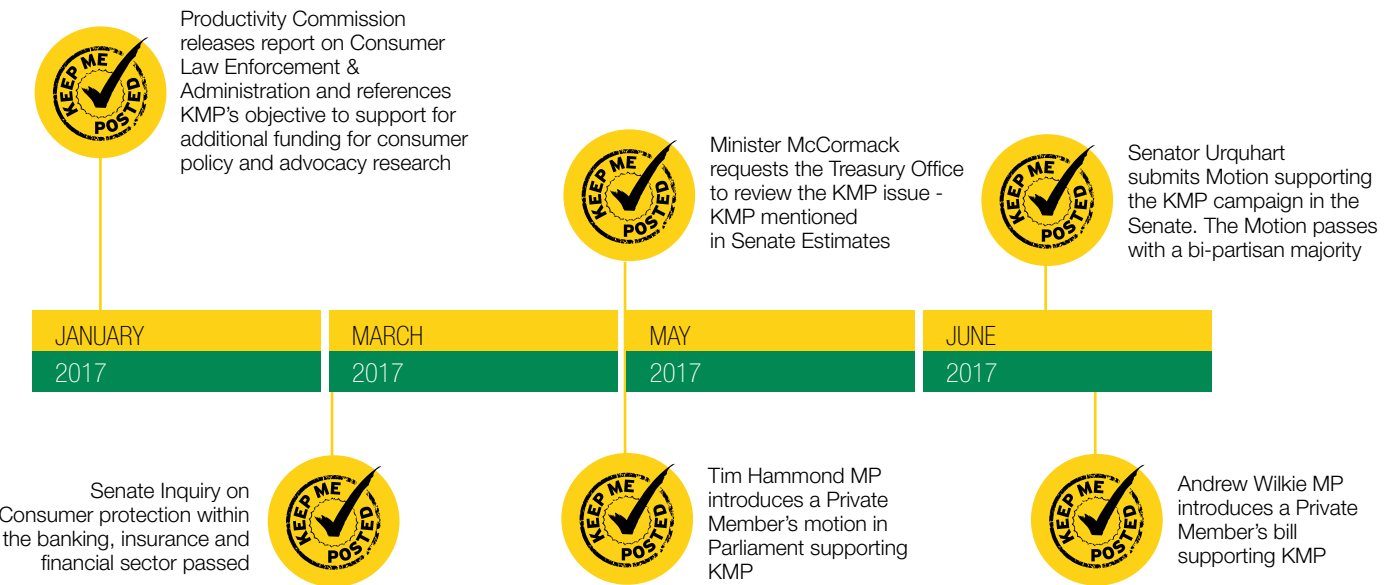
**COMING UP IN FY18**

- > Outdoor media campaign
- > Consumer Affairs Minister’s meeting in August
- > Treasury Office report in August

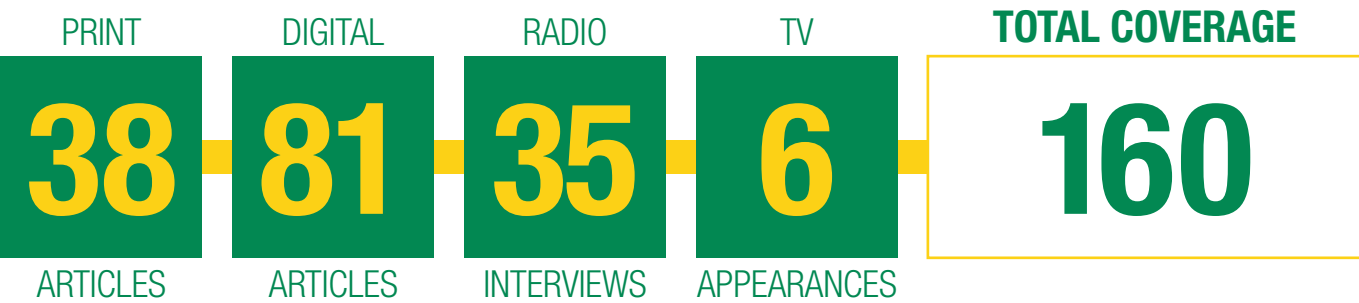
69

POLITICIANS MET

**Adam Bandt** **Tim Watts** **Mathias Cormann** **Bob Katter**  
**Gai Brodtmann** **Graham Perrett** **Justine Keay** **Ann Sudmalis**  
**Malcom Turnbull** **Mike Kelly** **Kim Carr** **Nick Xenophon**  
**Anne Urquhart** **Rebecca Sharkie** **John Madigan** **Andrew Leigh**  
**Michelle Rowland** **Nick Staikos** **Tim Hammond** **Rob Mitchell**  
**Anne Ruston** **Darren Chester** **Jason Falinski** **Lili D’Ambrosio**  
**Tara Cheyne** **Cathy McGowan** **Barry O’Sullivan** **Scott Ludlam**  
**Derryn Hinch** **Kimberley Kitching** **Stephen Jones** **Dean Smith**  
**Bill Shorten** **Stirling Griff** **Sam Dastyari** **Christine Couzens**  
**Steve Dimopoulos** **Andrew Wilkie** **Peter Whish-Wilson**  
**Linda Reynolds** **Shane Rattenbury** **Sharon Claydon** **Matt Keogh**  
**Lisa Chesters** **Mitch Fifield** **Mark Coulton** **Jacqui Lambie**  
**Michael McCormack** **Clare O’Neil** **Linda Burney** **Sue Lines**



MEDIA COVERAGE



KEY ACHIEVEMENTS

**NATIONAL PUBLIC FORUM ROADSHOW**

ACT/TAS/VIC/QLD  
With more than 350 community members attending.

**800,000 KMP COUNTERSTANDS**

KMP counterstands promoting the power of print in EVERY Australia Post office across Australia.

**TOP 100 ASX COMPANIES**

engaged to sign ‘The Pledge’ to protect print and distribution industries.

**ACCC / CHOICE & CONSUMER ACTION LAW CENTRE**

pledge support of the campaign objectives.

**34**

Local Government Councils across Australia pass motions of support





# ENVIRONMENT

## Presenting verifiable facts outlining the green credentials of paper and print

Two Sides is a campaign to promote the environmental credentials of paper and print. To support this mission over the past year, we partnered with twelve countries to conduct a Global Toluna and Two Sides survey. The survey provided insight into how consumers view the environmental impacts of digital versus paper-based communications and how they perceive and use paper in their everyday lives across the globe. Each country's independent results were also analysed and the results, on a global basis, proved just how much Aussies and Kiwis love paper. If you didn't get the survey give us a call and we'll post it out.

This year we also spent time producing a series of case studies that explored the full life cycle, from raw materials to end-of-life, of both paper and digital communications to offer guidance to individuals and companies on selecting media channels to best meet sustainability goals.

## TWO SIDES RESEARCH A GLOBAL FOCUS

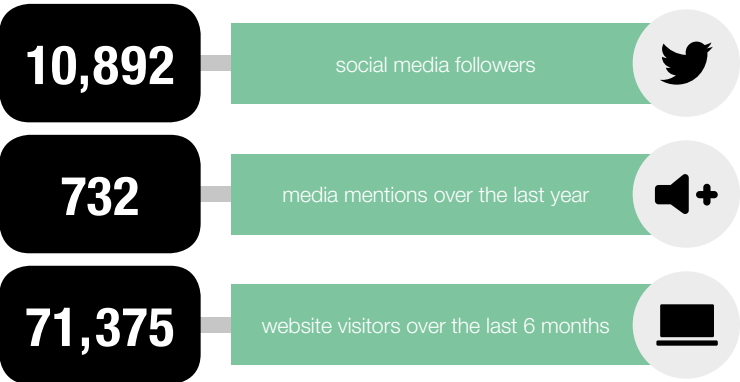
An international survey with over 7,000 recipients was commissioned by Two Sides and carried out by international research company Toluna Inc. in June 2016.

Lastly, a big part of Two Sides is the Anti-Greenwash campaign and as a result of its ongoing education, 73% of Australian companies contacted have removed or corrected environmental claims being used to promote electronic billing and other e-services as a more environmentally-friendly solution than paper.

## GLOBAL IMPACT

Two Sides is a global campaign active across North and South America, Europe and Oceania.

Together, we have a lot of impact!



The survey details responses from Australian and New Zealand consumers, providing insight into their perception of the environmental impacts of paper and print, their perception of why companies want them to turn to digital and their preferred communication format.

## HERE ARE A FEW HIGHLIGHTS FROM THE RESULTS:



### ANTI-GREENWASH CAMPAIGN

**73%**  
of Australian companies contacted have removed misleading claims about paper and print's environmental credentials.

### COMING UP IN FY18

- > Myths and Facts booklet: packaging focus
- > 2017 Global Two Sides Survey: Reading in a digital world: What do consumers prefer?
- > Webinars offering national campaign updates on new research and content

### PACKAGING

To ensure Two Sides represents the entire paper sector, an international collaboration of packaging content that communicates the environmental credentials of fibre-based packaging will be a FY18 focus.

This activity will see Two Sides working with various stakeholders who are mainly, but not exclusively, focused on fibre-based packaging to create a packaging focused Myths and Facts booklet. Should you have any Packaging Suppliers you feel we should engage please get in touch: [info@twosides.org.au](mailto:info@twosides.org.au)



# EFFECTIVENESS



## Building the story of the effectiveness of print and mail

Value of Paper and Print (VoPP) is a campaign promoting print media channels as relevant, effective and modern. To support this purpose, Spring 2016 saw the launch of our printed publication: VoPP Mag. The magazine is filled with a mixture of Australian, New Zealand and international content exploring how print is being used to drive successful marketing outcomes.

In addition to the magazine, the campaign also continued to produce case studies, Nickable charts and weekly eNews updates to keep members armed with fresh content.

## VOPP CONTENT - NEW CASE STUDIES & NICKABLE CHARTS



## VOPP MAG - TWO EDITIONS



“The VoPP Mag is a fantastic collection of well-crafted articles and case studies that we use as a tool when persuading clients to continue with print. As print remains a key part of many campaigns we work on, the VoPP Mag provides us with fresh content and ideas.”

**Stuart Shepherd,**  
Creative Director,  
redhanded (Clemenger)



“At Fairfax, we sell the value of print and digital hand in hand, the VoPP Mag encapsulates this relationship perfectly and is a real tool we can use to promote strengths in both channels. Well done to the team and keep them coming, it’s a game-changer.”

**Bob Lockley,**  
Group Director,  
Printing and Distribution,  
Fairfax Media

44

ARTICLES ACROSS TWO EDITIONS

40

THOUGHT LEADER CONTRIBUTORS

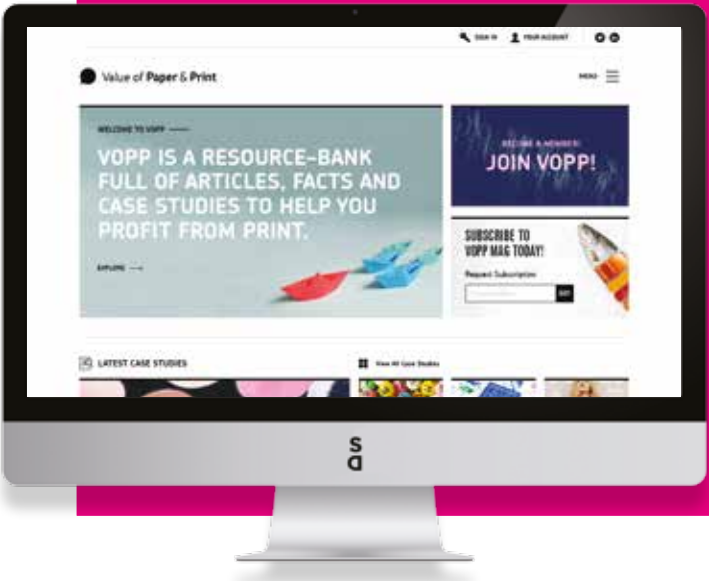
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DISTRIBUTED ACROSS ANZ



## VOPP WEBSITE NEW LOOK AND FEEL

The VoPP site will be upgraded to have a fresh look, rich visual styling, inspirational content, improved navigation and user experience with a highly functional search tool making the content easier to access and share.



## COMING UP IN FY18

- > Local area marketing: the upgraded website will contain a ‘Members Only’ area that allows VoPP content to be easily personalised, modified, exported and distributed to clients, leveraging the latest content.
- > Direct mail focus: A stand-alone Direct Advertising campaign communicating to designers, creatives and marketers the ROI and relevance of Direct Advertising.
- > Webinars: offering national campaign updates on new research and content.

# Tell your mates to join!

At TSA we are only as strong as our members, if you have friends or suppliers who aren't on board let them know this is an investment that delivers results. Spread the word to bring more opportunity for TSA to build on the good works we have been delivering to date.

TSA Limited is a not-for-profit industry funded organisation developing sales and marketing campaigns to promote the paper, print and mail industries.

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