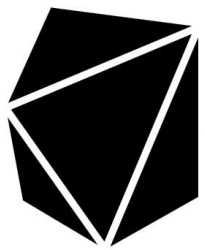




**LETTERBOX MEDIA/
AUSTRALIA**

**QUANT RD1/CONSUMER
READERSHIP AND
ENGAGEMENT**



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Recontact online survey findings

Expanding Single Source Letterbox Media module, based on qualitative findings

November 2018

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Roy Morgan

Prepared for:
Kellie Northwood
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Methodology and Sample

**Methodology:**

Online recontact survey,
fieldwork conducted over
November 2018

**Sample:**

2000 Australians, General
population 14+

**Survey design:**

based on exploratory
qualitative findings

Analysis:

For today's presentation data was
analysed by the following sub-groups:

- All Australians
- Any catalogue readers (hard copy or digital)
- Hard copy readers L7D or L4W
- Digital L4W

In today's presentation

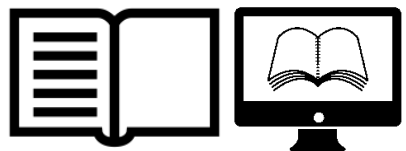
Topline online survey findings

- Overall catalogue usage – digital and hard copy, overlap
- Most popular catalogues by industry and channel
- Comparing catalogues to other media channels
- Keeping and sharing catalogues
- Lifecycle of catalogues
- Catalogues on path to purchase
- Time spent reading catalogues
- Role of inspiration, price savings, usefulness
- Spending on catalogue purchases

Next steps

- Implementation into Single Source media diary
- Launch date of new SS module
- New Zealand

Overall catalogue readership



93% have read a Hard Copy or Digital Catalogue at least sometimes



58% have read a Hard Copy Catalogue L7D



69% have read a Hard Copy Catalogue L4W



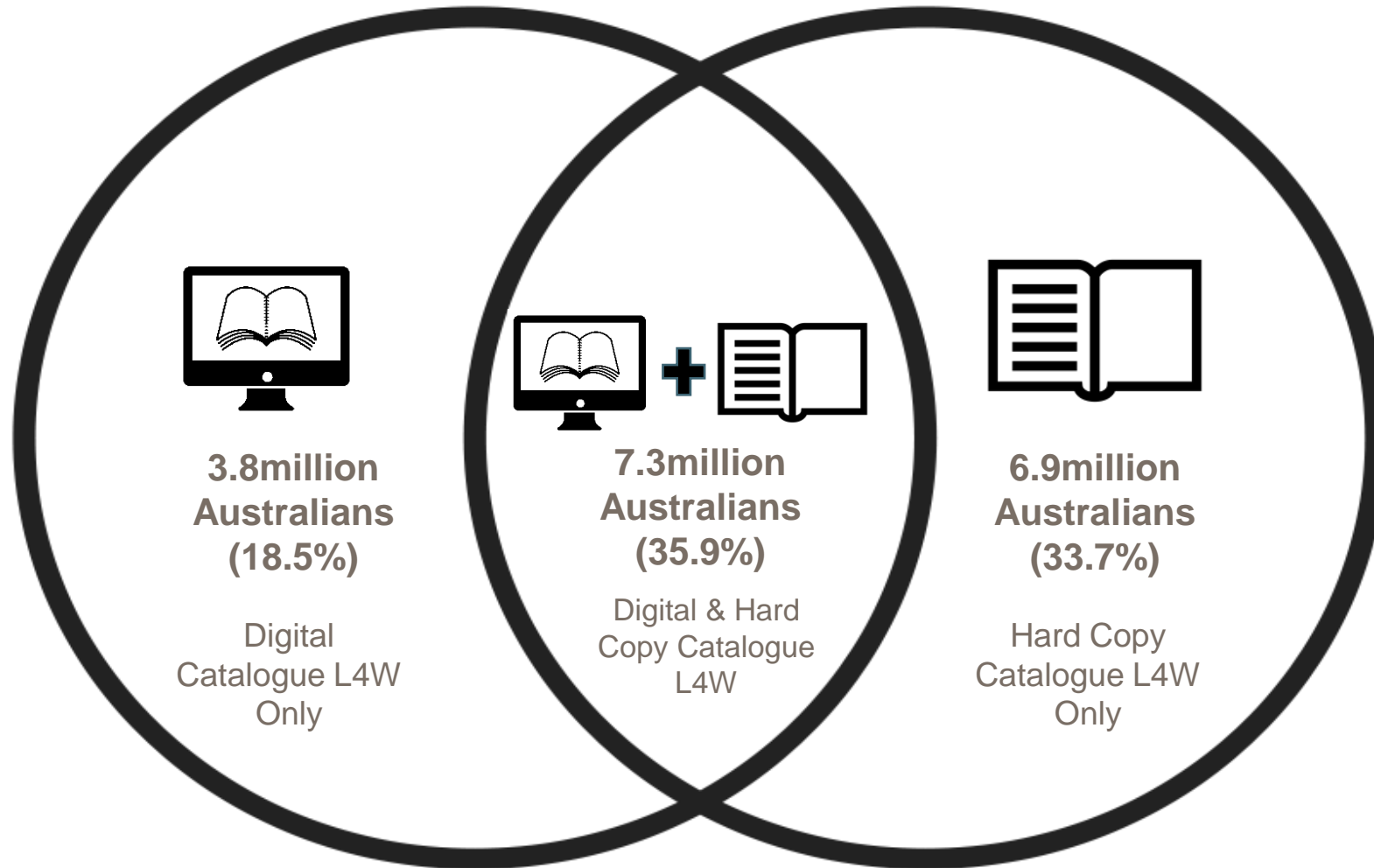
48% have read a Digital Catalogue L4W



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Online or Offline? Catalogue Readers are doing both

There's a considerable overlap of people reading both digital and hard copy catalogues – 7.3 million have read both in the last 4 weeks



Australia's favourite Catalogue types

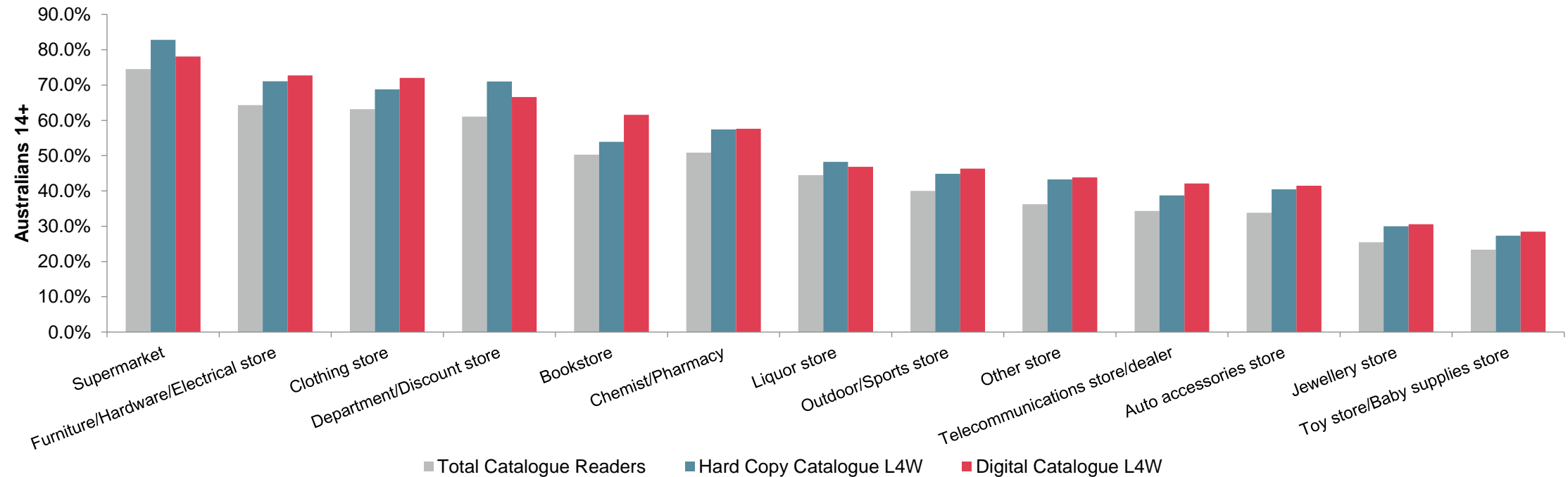


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Most popular catalogue types

Amongst Hardcopy L4W readers: Supermarket and Homeware are top

Amongst Digital L4W: Clothing and Bookstore are top



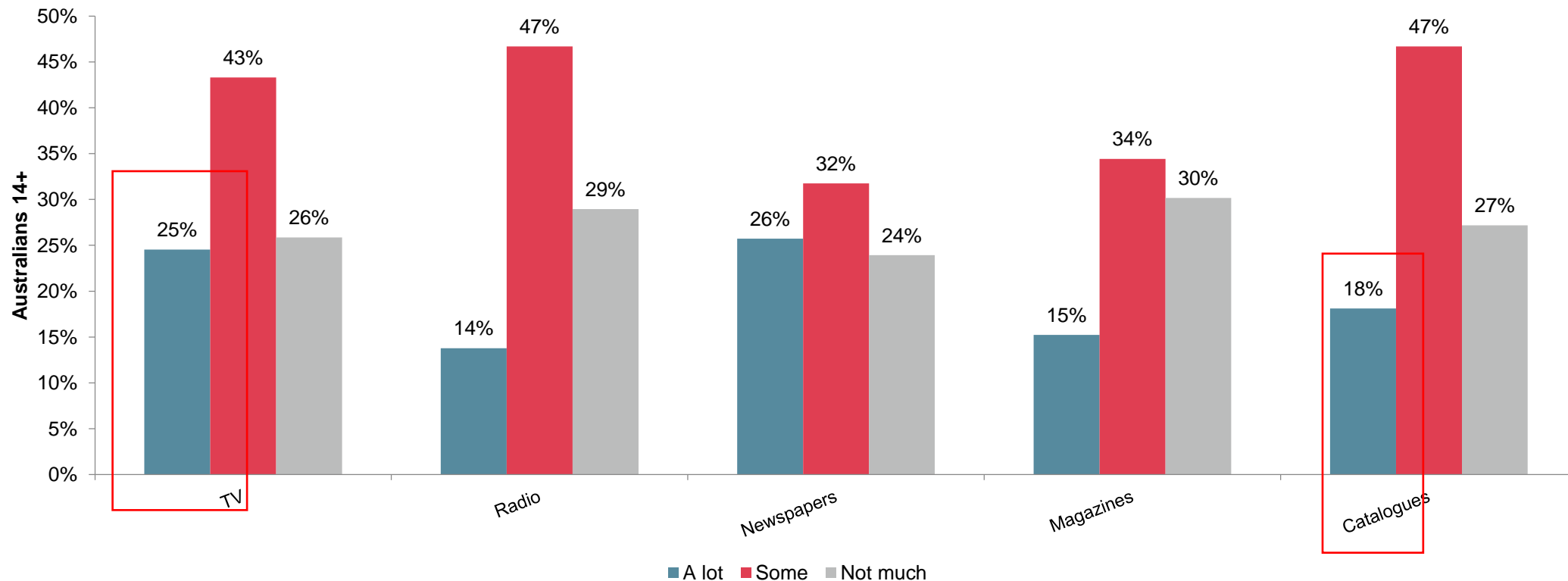
How catalogues stack up compared to other media channels when it comes to quality of attention?



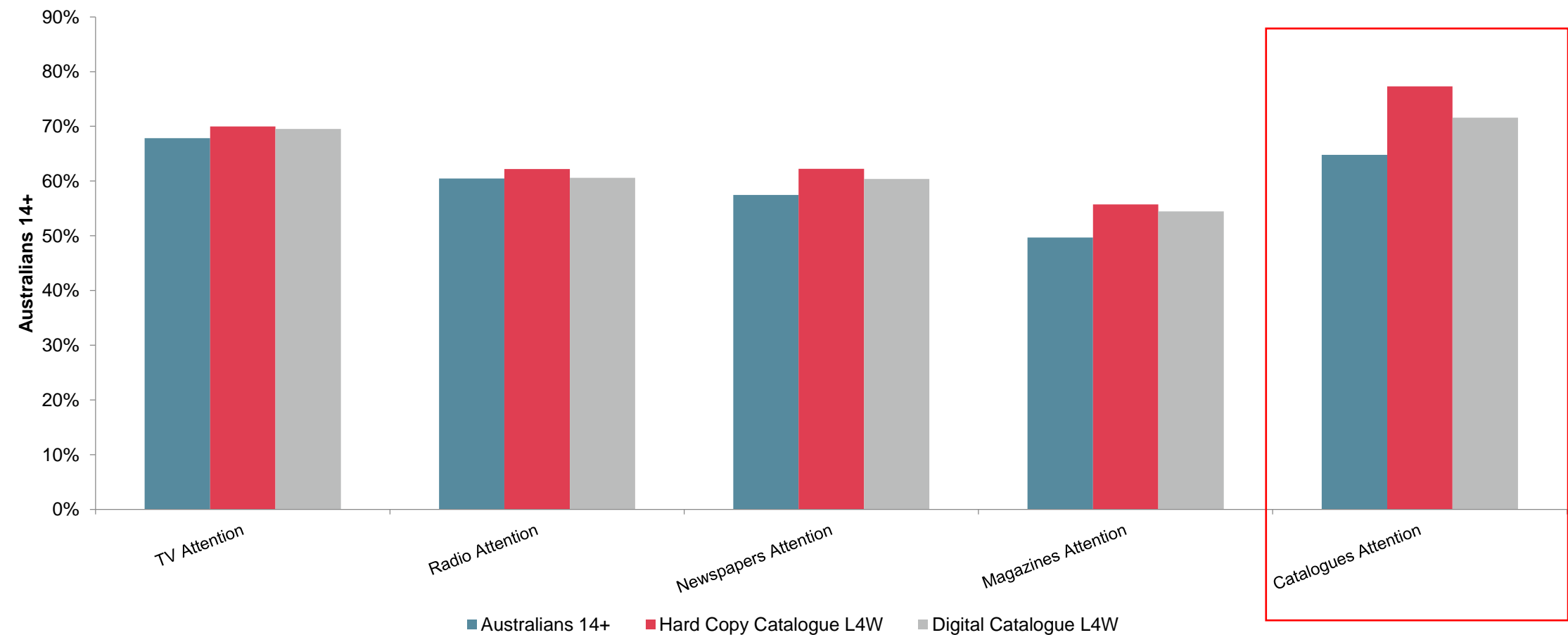
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Catalogues are a true competitor to other mainstream media when it comes to quality of engagement

- Australians pay just as much attention to Catalogues as TV and Newspapers
- And they pay more attention to catalogues than Magazines or Radio



Not surprisingly, more **hard copy** and digital catalogue readers are paying a lot/some attention when reading catalogues



Roy Morgan Online Survey November 2018 (Sample n=1,813)
Base: Australians 14+
'Attention' is an ad-hoc of those who pay 'a lot' or 'some attention'

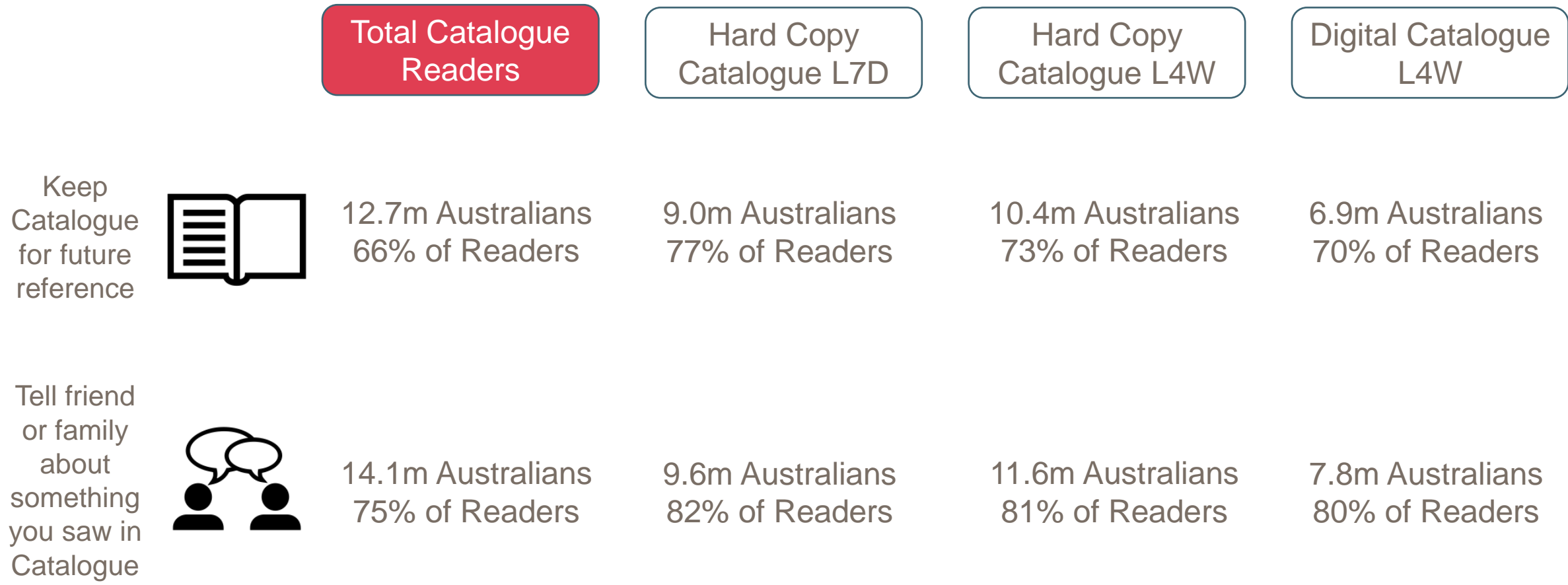
Australians like to hang on to
their catalogues and share
them



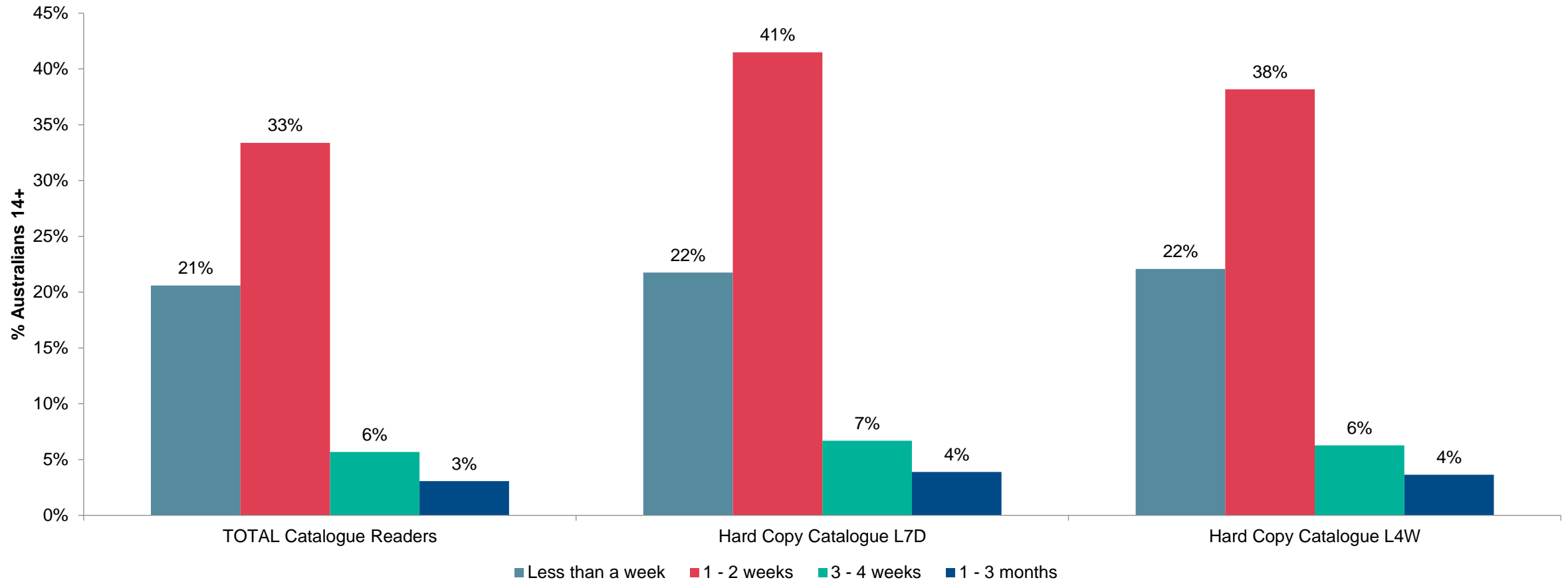
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7 in 10 keep catalogues for future reference

8 in 10 tell others about what they've seen in a catalogue

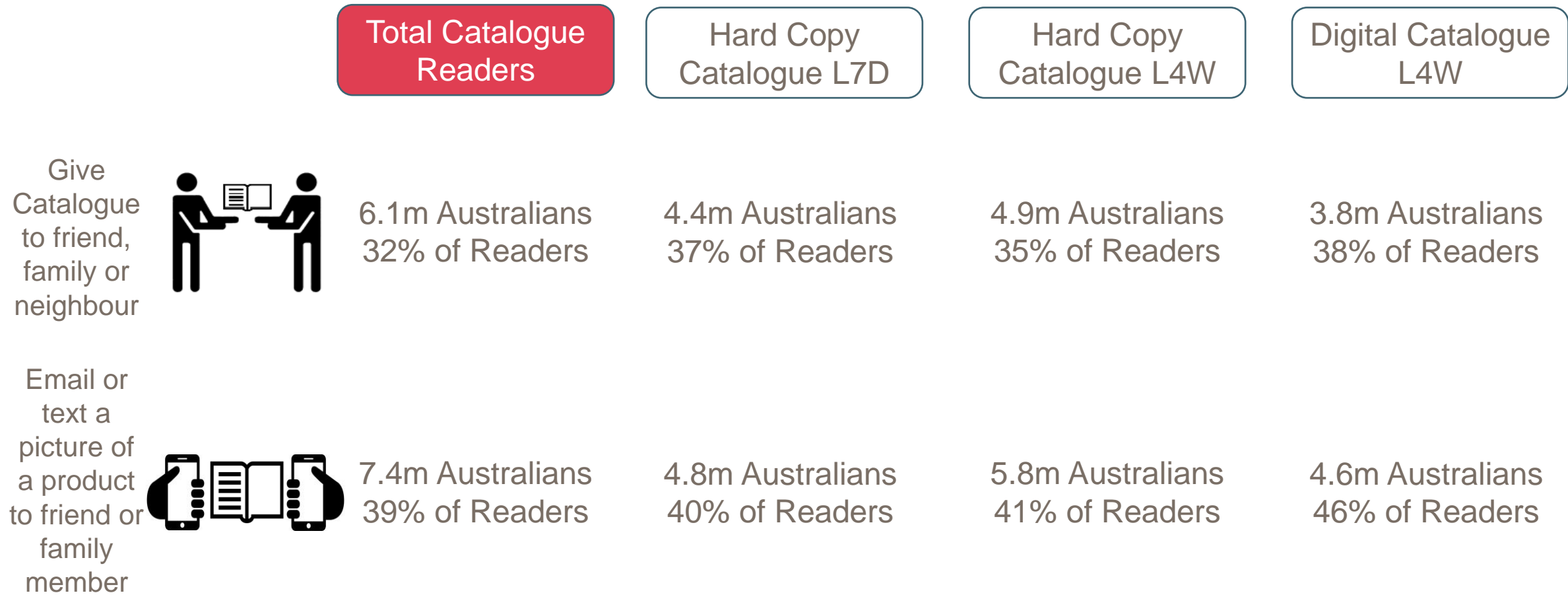


When it comes to catalogue lifecycle: Hard Copy readers keep their catalogues for 2.5 weeks on average



There is a significant secondary circulation of catalogues:

1 in 3 share hardcopy catalogues, 4 in 10 share them via DIY digital



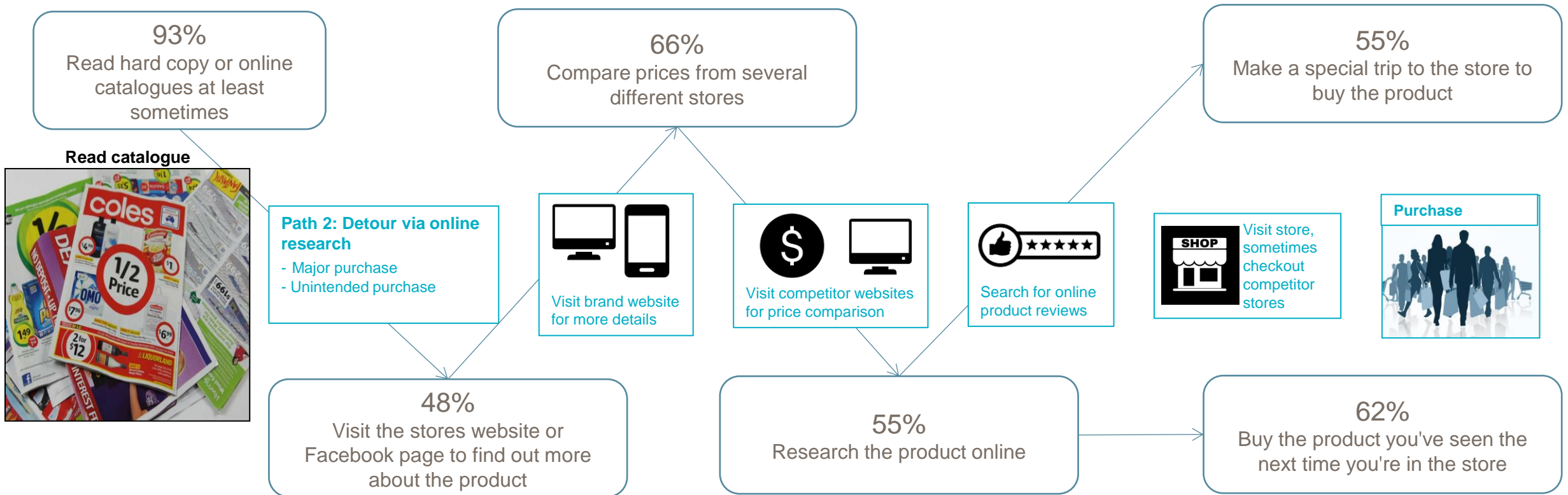
Catalogues are a key player
on the path to purchase



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Quantifying the role of catalogues on the Path to Purchase

- Catalogues drive readers to the store's website or social media
- And to make a special trip to the store to purchase the product



Path to Purchase by Catalogue type:

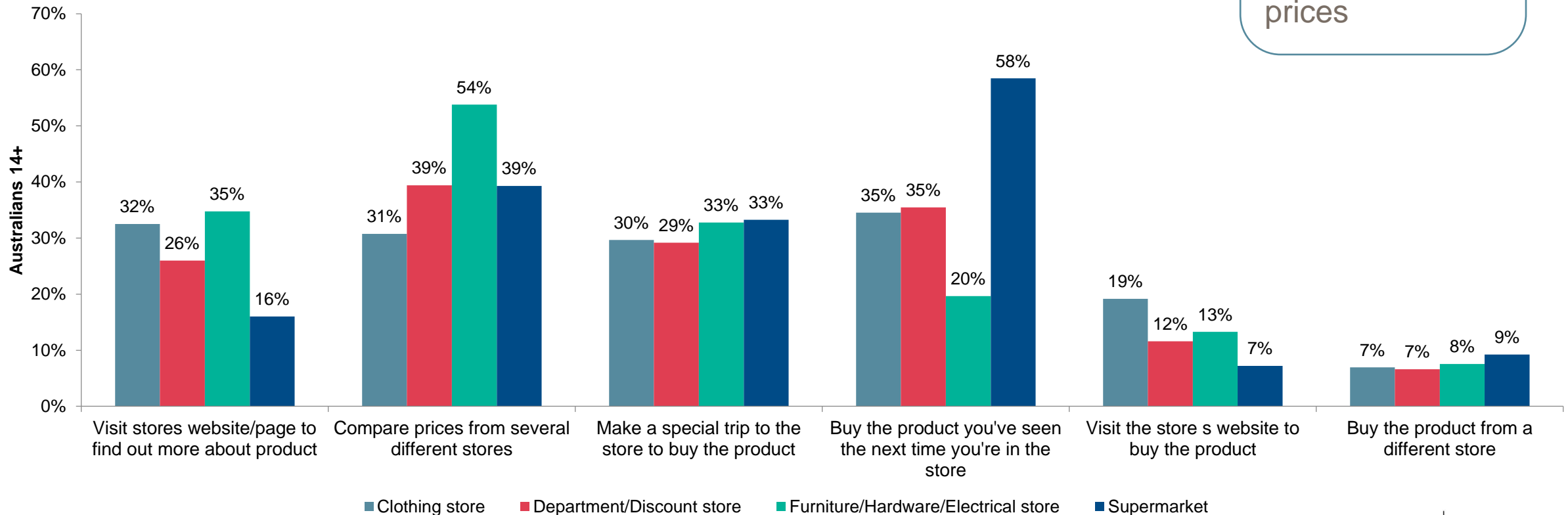
Catalogues drive brand interaction and get people in store

1 in 3

Furniture and electrical catalogue readers go to the store's website/FB

1 in 5 clothing catalogue readers will go the store website to buy online

...Furniture, hardware and electrical more likely to compare prices



Australians make time for Catalogues: time spent reading



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Supermarket + baby/toy catalogues have the highest average readership time

Supermarket Catalogue readers spent 7.5 mins reading on average

31% read Supermarket Catalogues for **5-9 minutes**

15% read Supermarket Catalogues for **10-19 minutes**

46% of Supermarket Catalogue readers spend between 5-19 mins reading

Toy Store/Baby Catalogue readers spent 7.23 mins reading on average

25% read Toy Store/Baby Catalogues for **5-9 minutes**

13% read Toy Store/Baby Catalogues for **10-19 minutes**

38% of Toy Store/Baby Catalogue readers spend between 5-19 mins reading

Measuring the role of:

Inspiration

Price

Utility

Daily routine



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Inspiration, discovery and relaxation are significant drivers of catalogue readership

	Total Catalogue Readers	Hard Copy Catalogue L7D	Hard Copy Catalogue L4W	Digital Catalogue L4W
I read catalogues to discover new products	74%	82%	80%	79%
Catalogues are a stress-free way to browse or window-shop	66%	76%	73%	69%
I find inspiration for gift ideas in catalogues	62%	70%	68%	68%
I read catalogues because they sometimes inspire new ideas	59%	67%	65%	67%
I read catalogues to relax and unwind	35%	43%	40%	38%

Catalogues save us money



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Saving money and planning shopping are also significant drivers

	Total Catalogue Readers	Hard Copy Catalogue L7D	Hard Copy Catalogue L4W	Digital Catalogue L4W
I read catalogues to save money	75%	82%	80%	76%
I read catalogues to keep up-to-date on products and prices	64%	74%	71%	69%
I use supermarket catalogues to plan my grocery shopping and meals	41%	51%	48%	44%

Measuring the role of utility: Catalogues make shopping easier



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Catalogues are a useful shopping tool and more useful form of advertising

Total Catalogue
Readers

Hard Copy
Catalogue L7D

Hard Copy
Catalogue L4W

Digital Catalogue
L4W

Catalogues are a helpful
shopping tool

74%

84%

81%

76%

I find catalogues more
useful than other forms
of advertising

55%

68%

63%

57%

I spend more time
reading catalogues than
magazines

47%

54%

51%

47%

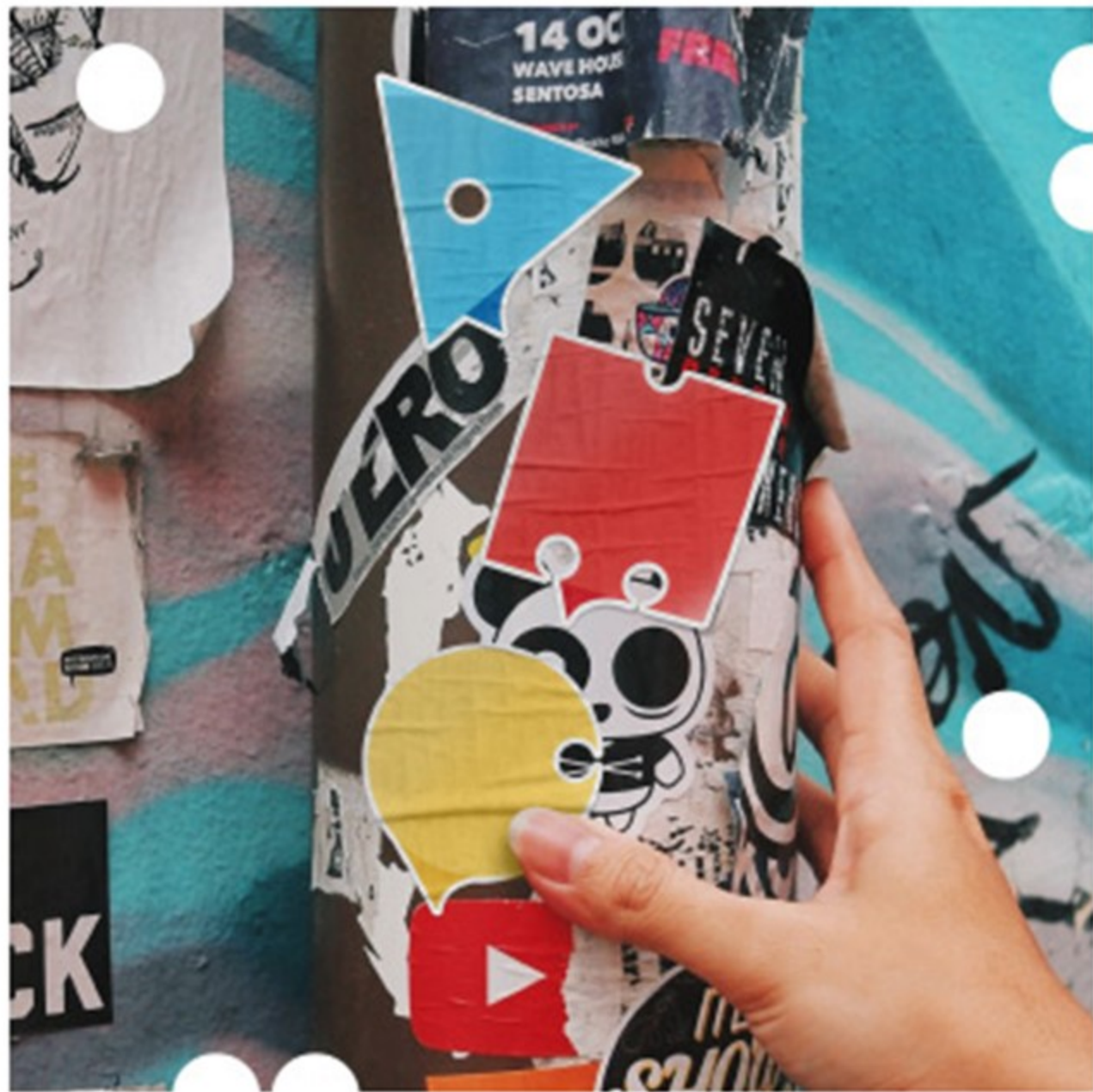
I would rather read a
catalogue than search
for a product online

36%

47%

43%

34%



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