



the
real-media-collective

THE REAL MEDIA COLLECTIVE

INDUSTRY INSIGHTS REPORT

2022

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ABOUT THE REAL MEDIA COLLECTIVE

'The Real Media Collective' provides thought leadership, education and protection of the effectiveness, relevance, versatility, power and sustainability of consumer marketing channels.

All activities and communications are delivered in a considered, researched, balanced and verifiable manner offering a sophisticated industry voice across producers, distributors, buyers and end-users.

The Real Media Collective was formed in 2018 under a merger from the ACA, APIA and TSA Limited. In 2022, The Real Media Collective announced a merger with the peak industry body, the Print & Visual Communications Association of Australia. At the time of writing this report, the merger was in process.

The origins from the Australasian Catalogue Association see The Real Media Collective representing the users, producers, and distributors of catalogues, direct mail, print, paper and more across the entire marketing universe. Providing a forum for the promotion of all consumer marketing channels (established and new) in their capacity as an effective advertising medium delivering results.

In this report, we measure and build metrics across Audience Reach, Circulation, Market Segmentation, Engagement, Effectiveness and Path to Purchase.

The Real Media Collective operates across Australia and New Zealand.

www.therealmediacollective.com.au



EXECUTIVE SUMMARY



As we navigate our way through the pandemic economically and socially, our worlds of communication and engagement with consumers also evolves. Despite the period of lockdowns and restrictions, where our communities and opportunities to sell, shop and interact with our customers were limited, now as we expand our horizons the role of print media and its interaction with digital channels is critical to understand.

Throughout the report, we explore consumer behaviours, online versus bricks and mortar shopping behaviours. With a 24.4% increase through-the-year in turnover, this is the lowest proportion of online sales to total retailing since May 2021. Returns to in-person shopping have caused the proportion of online sales to total retailing to fall a total of 0.9% from 10.9% in March 2022 to 10.0% in April 2022. This is the lowest proportion of online sales to total retailing since May 2021, as consumer patterns re-emerge and settle to a new 'normal'. This leads us to ask some important questions. How are consumer's behaviours changing, if at all, post-pandemic? What behaviours are still evolving? As supply chains, pricing and other constraints impact the supply of all media from production to print, photography to direction, how will media establish its relevance and fight for the marketing budget?

This report explores the successes and opportunities of real media channels delivering results from a consumer's lens. We know print media channels remain stable and effective whilst carrying the strongest credential of all - being preferred by consumers across many engagement points across the path to purchase. Globally, 3 out of 5 of the top media channels consumers find most effective are print. These include magazine, POS and newspaper advertisements. Catalogues also sit as a highly effective sales driver with the weekly highest reach across all media channels across the region.

We know print media creates higher levels of engagement, trust, and emotional connection with consumers than digital channels, yet the opportunity to pair these two in a strong marriage is endless and provides analytical metrics we can replicate through a multi-channel universe.

Consumer behaviours have changed, however we know readers spend approximately 30 minutes a week engaging with brands through print magazines, compared to 3 minutes a month through online magazines - so how can we have the two interact more intelligently? Research across mail shows a highly engaged audience with 80% of people reading their mail immediately compared to 63% who open emails immediately.

Mail also carries a high trust index and emotionality, nearly two-thirds of respondents suggest that receiving mail provides a sense of affirmation that digital communications lack, making them 'feel important'. Mail makes consumers feel valued by a company, an opportunity to build emotional connections. Print also holds a sense of legitimacy for customers as incidences and anxieties regarding scams and cybercrime increase, with a 600% increase in Cybercrime since the beginning of the global pandemic brands are on alert to manage their integrity. In 2022, 59.4% of reported scams were through digital channels, as compared to 1.3% through physical mail.

With strengths and relevance of the channels that The Real Media Collective represents - magazines, newspapers, print marketing, catalogues, letterbox, point of sale, customised digital solutions and more, the industry must also continue to uphold and strengthen the sustainability values of our channels, as consumers become increasingly eco-conscious and aware of media's ecological footprint.

Paper production is a highly sustainable industry, with low greenhouse emissions in comparison to other industries and has been part of a circular economy for decades due to its harvesting of a renewable resource. Paper-based packing is favoured for being better for the environment and consumers know it - 43% of consumers are willing to spend more on products if packaged in sustainable materials and the same percentage would consider avoiding a retailer if they believe that retailer is not doing enough to reduce its use of non-recyclable packaging. 26% of 18-to-34-year olds have stopped using a brand altogether in the past six months due to concerns about sustainability. Paper based media channels' renewability, recyclability and compostibility are recognised and understood.

And, almost as a disclaimer, I always feel compelled to highlight, this report is not anti-digital, in fact online and offline channels work in a complementary fashion. We can have a website and EDMs, catalogues and television presence, collectively working for optimal results. No channel needs to be replaced by another, nor does one channel suit all audiences at each point of engagement. We have seen the error of this approach from major brands losing market-share and identity with a one or the other approach, we know brands are working through balancing the mix and this report is here to assist the thinking across the channels they have ready, and new, access to.

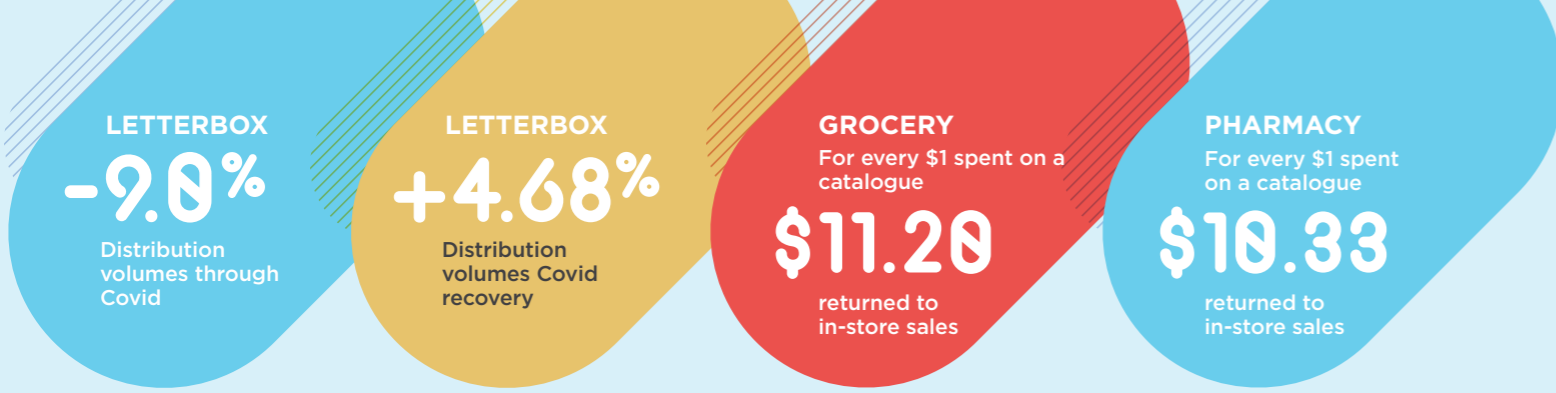
Kellie Northwood
Chief Executive Officer
The Real Media Collective





INDUSTRY METRICS

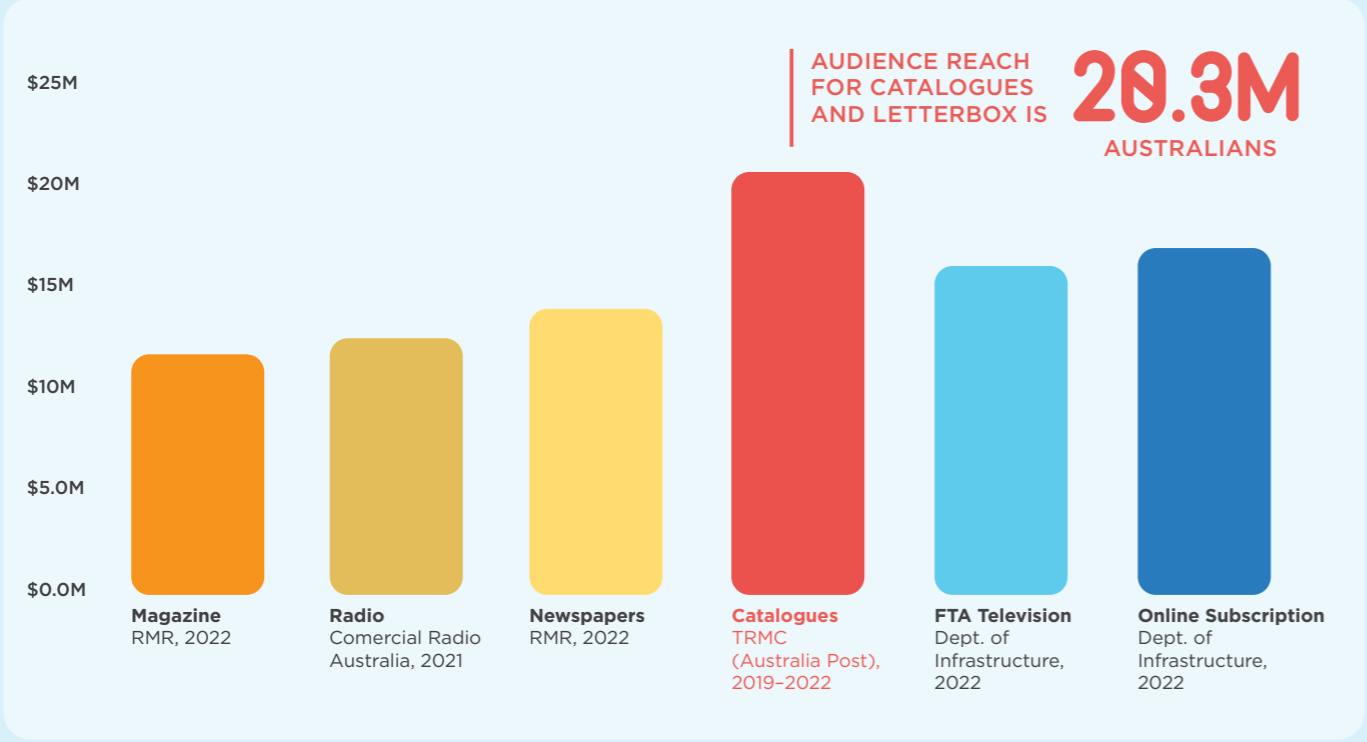
Industry metrics provide a quantitative analysis of print media and related marketing channels to assist media investors, brands, retailers, marketers, agencies and more in understanding the measurements, comparisons and general performance of print media and related marketing channel. Tracking performance across market segments, volumes, reach, size, value and comparative channel analysis as well as international trends allow marketers to understand the strengths of the print sector.



MARKET SEGMENTATION

The pandemic chapter, trends in pagination and design shifts and reflects some minor changes across market segmentation, however predominantly the balance across retail segments remains consistent

READERSHIP AND REACH



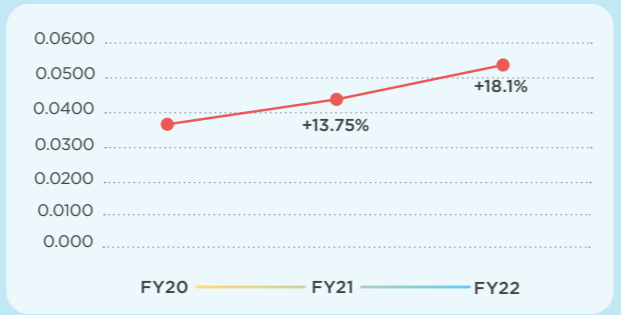
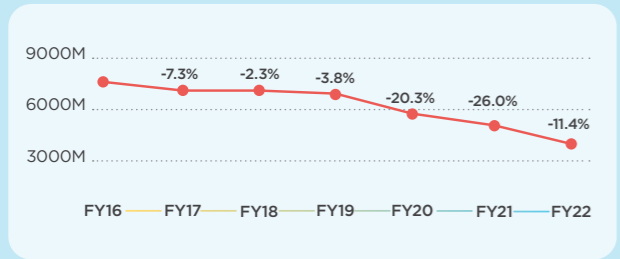
The Grocery sector, Woolworths, ALDI, IGA, Ritchies, Foodland, demonstrate their expertise across the catalogue and letterbox distribution channel. Increasing their investment in the channel through the past twelve months. With Coles moving away from the letterbox distribution channel, their grocery supermarket competitors have thrived from their absenteeism, increasing volumes and in turn increasing market-share. A powerful success story for the catalogue and letterbox marketing sector.

Pharmacy and Specialty Retail have both experienced increases as we see a trend of the sales acquisitional catalogue pushing with higher frequency and the introduction of product range, such as Fragrances or Skincare, being placed seasonally. Sales results and brand awareness improvements have been the reported outcomes of this approach.

Hardware was the second largest market segmentation growth with Mitre 10 showing leadership across marketing strategy and a strong local area marketing focus and use of a mass media channel. Using targeting tools and understanding the demographic reach of your local area is an effective analytical approach to catalogue and letterbox marketing strategy that has delivered double digit sales growth success for the brand. Customised, personalised and engaging campaigning, rather than mass brand blasting is the proving the power punch of success in this sector.

Fashion, Outdoor, Sport and Leisure sectors have witnessed increases, however from new and international players who do not have as strong a physical presence. Whilst operating from an online store and ecommerce pathway presence, the brands growing in investment in these sectors are using the catalogue to build a physical connection to customers and extended their reach from digital audiences to the 43% of consumers looking for offline experiences.

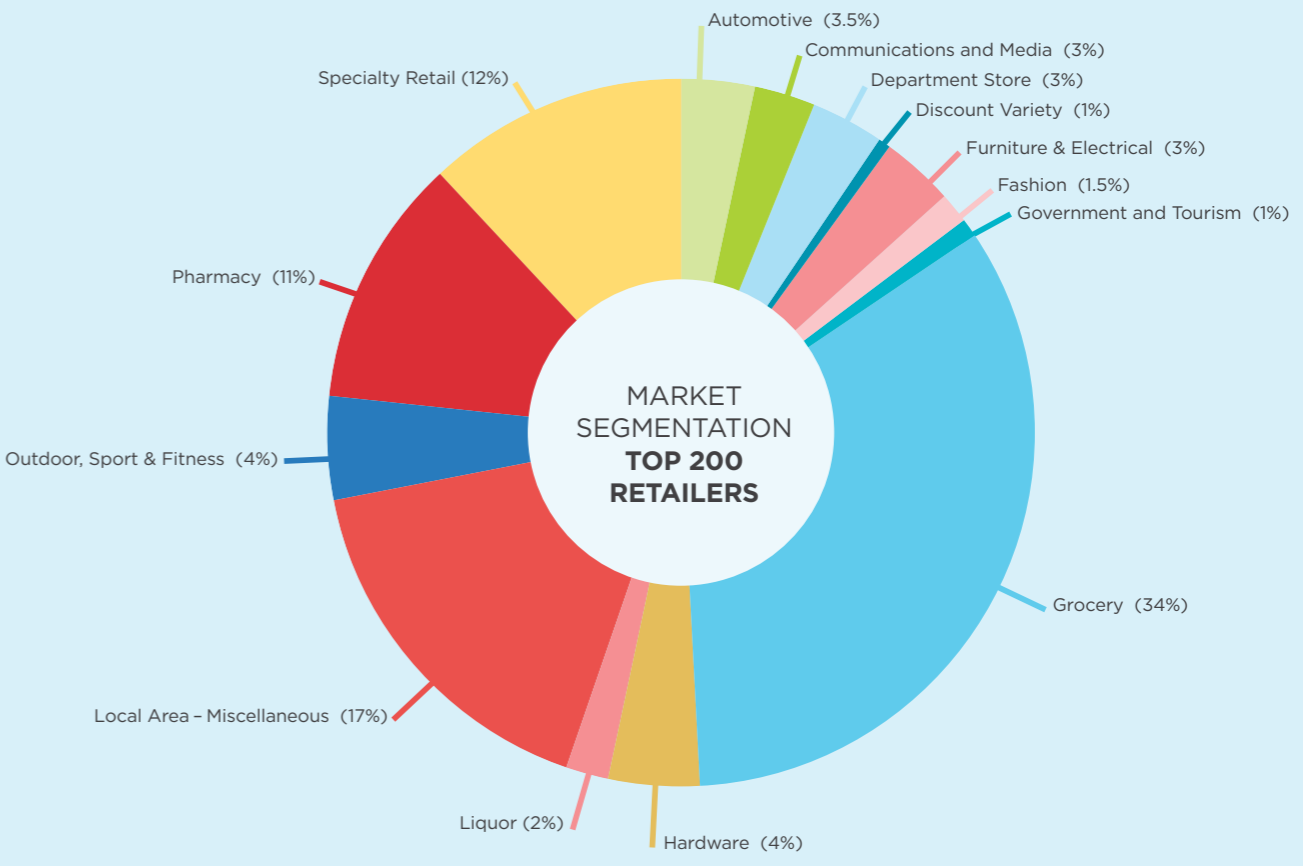
CIRCULATION



COVID, supply chain shortages, paper price increases and industry consolidation has hit the catalogue letterbox distribution volumes, however there have been recovery windows and frequency lifts in the use of the channel from brands and retailers.

CATALOGUE WEIGHT INCREASE BY 34.4% THROUGH THE PANDEMIC.

Despite supply chain and paper price pressures, the catalogue sector has remained buoyant with retailers adding pages and content whilst reducing frequency due to floods, lockdowns and other impacts on distribution networks. The quarter leading up the end of financial year, always a low letterbox distribution month, realised a +4.68% increase which is also reflected in the scheduling volumes now being established as supply chains are settling.



THE DIFFERENCE BETWEEN CONSUMERS AND MARKETERS



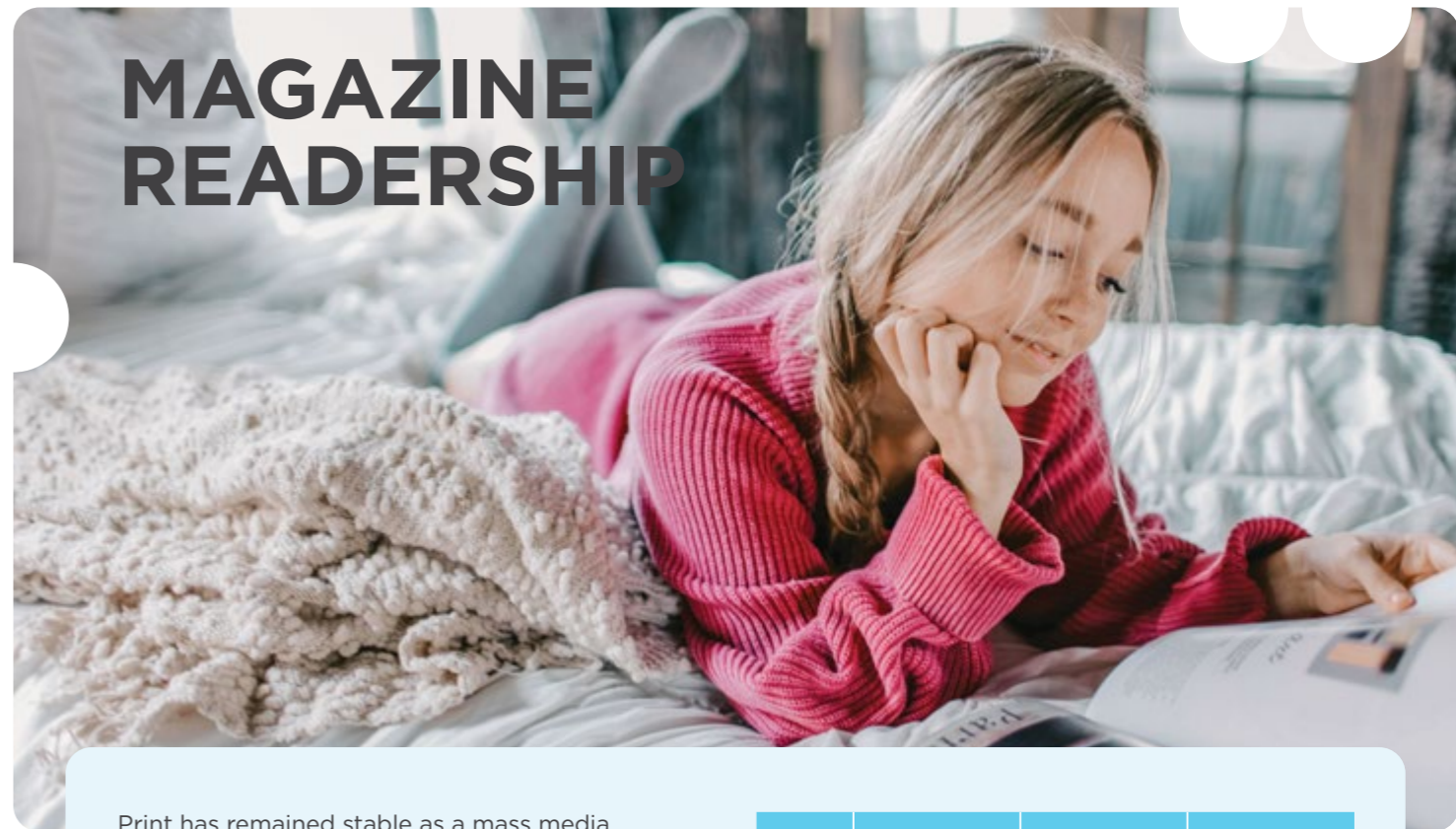
Consumers	Preference	Marketers
Cinema ads	1 st	Online video ads
Sponsored events	2 nd	Social media stories
Magazine ads	3 rd	Influencer content
Point of sale ads	4 th	Television ads
Newspaper ads	5 th	Digital OOH ads

Source: Kantar Media Trends, 2021

Kantar Media Trends have revealed that consumers and marketers have very different views when it comes to advertising. Globally, 3 out of 5 of the top media channels consumers find most effective are print. These include magazine, POS and newspaper advertisements.

However, when surveyed, marketers prefer and recommend digital channels such as online video ads, social media stories, influencer content, TV ads and digital OOH ads, none of which are represented in what consumers stated they prefer and trust more.

MAGAZINE READERSHIP

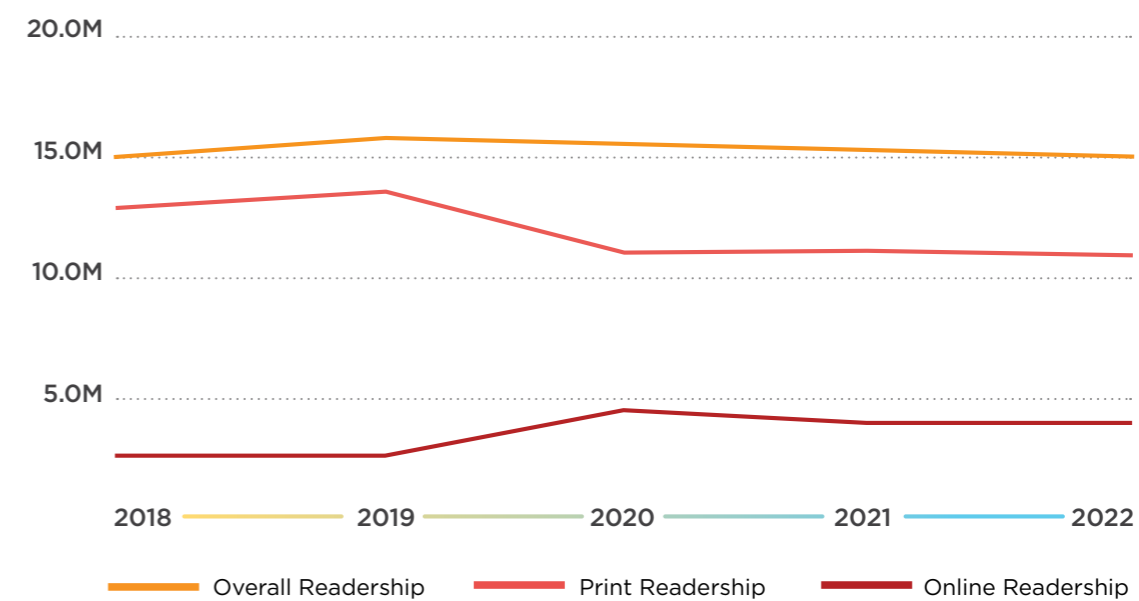


Print has remained stable as a mass media channel and despite greater focus on online readership in media coverage, receives superior readership, reflecting a uniform movement between online and print.

Year	Overall Readership	Print Readership	Online Readership
2018	15.19M	12.60M	2.58M
2019	15.64M	13.10M	2.54M
2020	15.40M	10.84M	4.56M
2021	15.00M	11.0M	4.00M
2022	14.80M	10.90M	3.90M

30 MINUTES VS 3 MINUTES

Audiences spend approximately 30 minutes each week engaging with brands through print magazines, compared to just 3 minutes a month through online magazines¹.



Source: Roy Morgan 2017-2022

PACKAGING



72%

OF PEOPLE SAY THAT THE DESIGN OF A PRODUCTS PACKAGING INFLUENCES THEIR PURCHASE DECISION²

51% of people prefer products ordered online to be delivered in paper packaging³.

43% of Australians would be willing to spend more on a product if it were packaged using sustainable materials³.

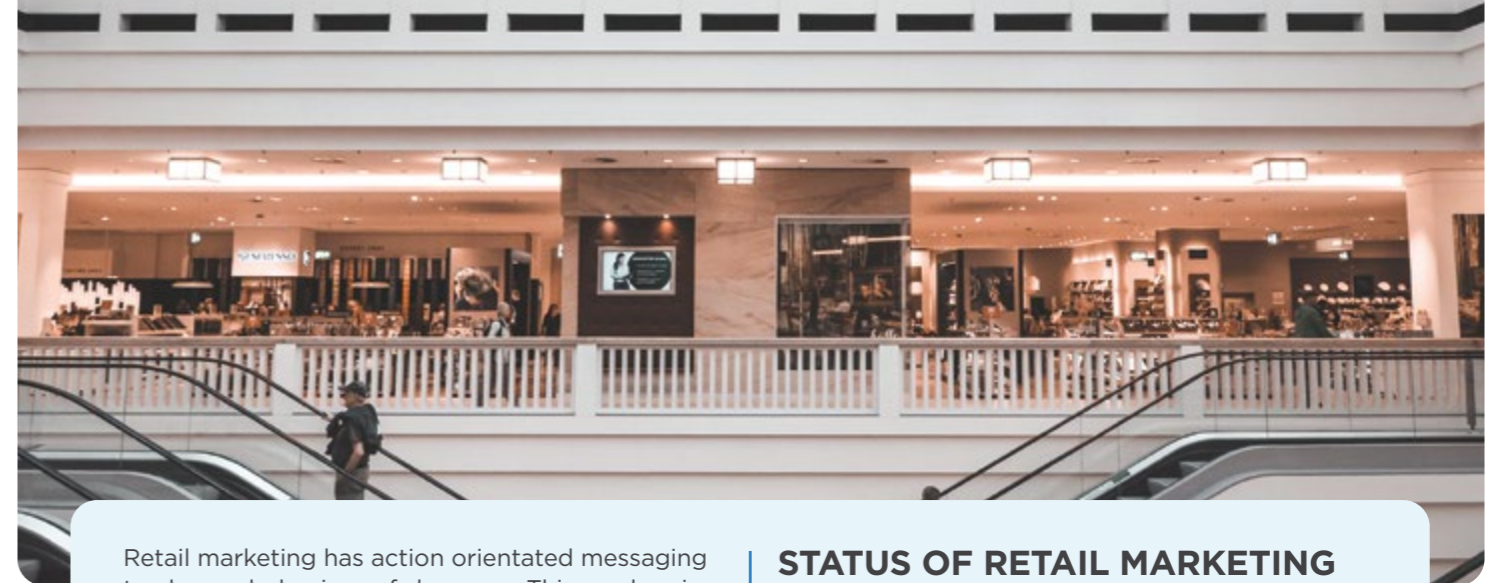
43% of Australians would consider avoiding a retailer if they knew they were not actively trying to rescue their use of non-recyclable packaging³.

41% of Australians are actively taking steps to increase their use of paper packaging³.

55% of Australians would buy more from retailers who are removing plastic from their packaging³.

55% of Australians think that non-recyclable packaging should be discouraged through taxation³.

RETAIL MARKETING AND POINT OF SALE



Retail marketing has action orientated messaging to change behaviour of shoppers. This can be via digital, or via physical POS in stores. The past year has seen some changes with involvement of retail marketing earlier in organisations' planning cycles to build more creative ideas and application, a matured industry deepening output from expertise and an expansion from purely in-store, to now the wider path to purchase process.

71% of customers remember the billboards that they see on a daily basis⁶.

57% of customers trust the messaging that they see on billboards⁶.

72% of shoppers at supermarket queues make impulse purchases, besides other retail stores⁵.

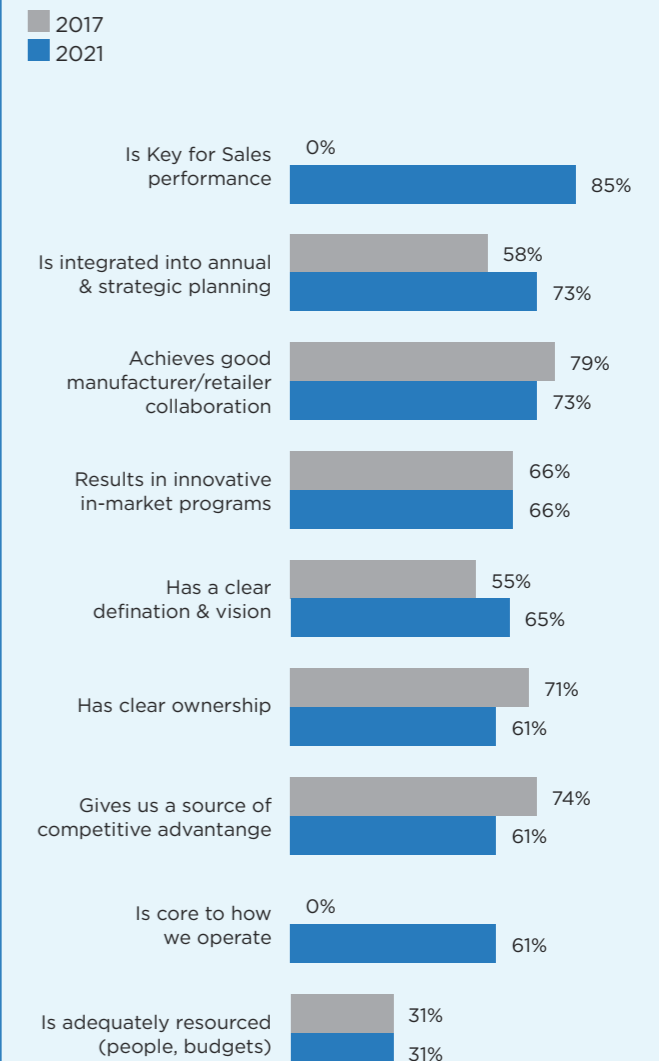
Retail Display and Point of Sale is expected to have a Return on Investment (ROI) of

497%

and an expected annual growth rate of **10%** throughout 2021⁶.

STATUS OF RETAIL MARKETING IN BRAND ORGANISATIONS

(Top 2 Box Agree/Completely Agree)



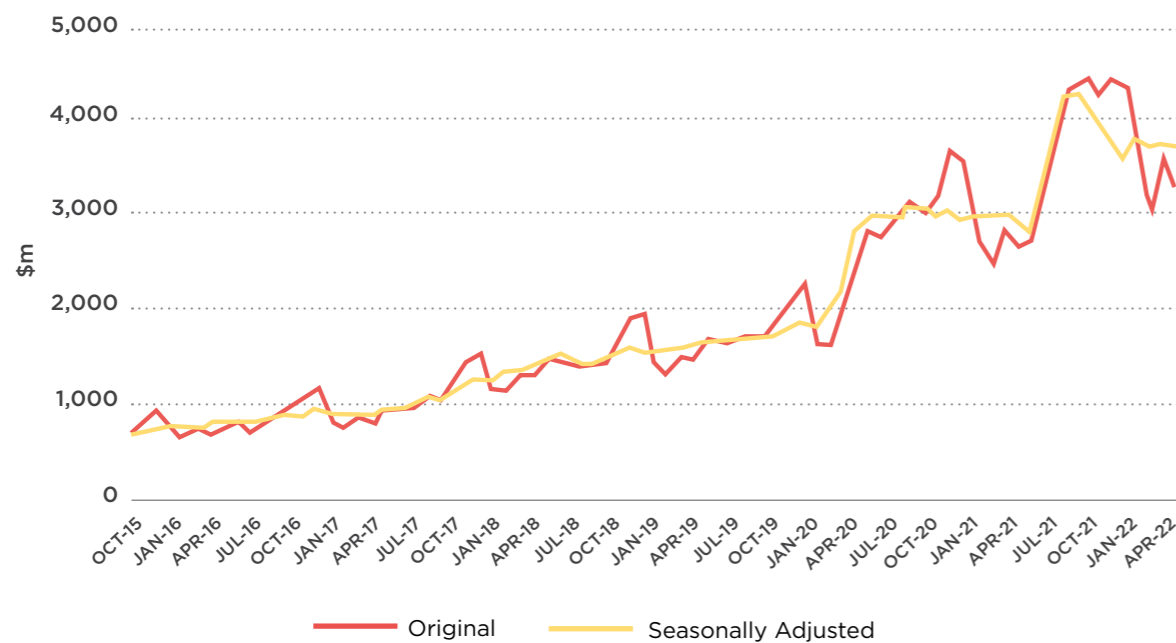
ONLINE RETAILING



Total online retailing sales in Australia were \$3,676m in April 2022, in seasonally adjusted terms⁷. Seasonally adjusted online sales fell 1.3% (-\$48.7m)⁷. This is the fourth monthly fall in online sales in the six months since state lockdowns ended in October 2021. Online sales whilst down from their peak, remain above the pre-Delta outbreak level. Total online retailing turnover remains elevated, up to 24.4% (\$718.8m) through-the-year, in seasonally adjusted terms⁷.

24.4%
INCREASE THROUGH-THE-YEAR IN TOTAL ONLINE RETAILING TURNOVER

TOTAL ONLINE, ORIGINAL AND SEASONALLY ADJUSTED

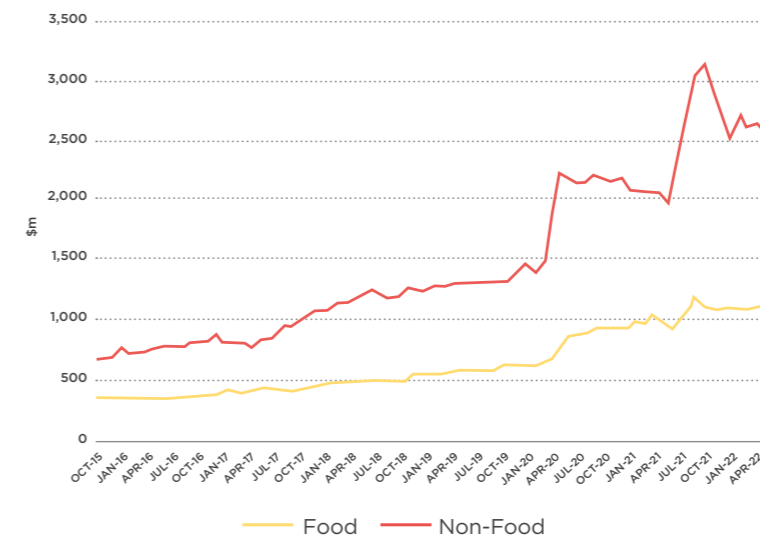


In April 2022, Food online sales were \$1,065.8m, and Non-Food online sales were \$2,610.4m, in seasonally adjusted terms⁷. Total seasonally adjusted online fell 1.3% (-\$48.7m). Non-Food sales were down 2.5% (-\$66.4m), whilst Food sales rose 1.7% (\$17.7m)⁷.

ONLINE RETAILING



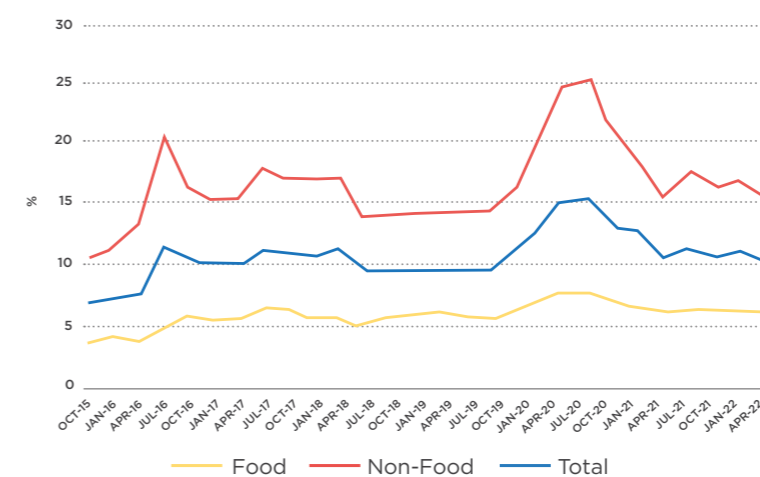
ONLINE SALES, FOOD AND NON-FOOD, SEASONALLY ADJUSTED



In original terms there were falls in the proportion of online sales for Food and non-Food retailing to total retailing⁷. The proportion of online food sales fell to 5.5% in April 2022 from 5.9% in March 2022, while the proportion of online non-food sales fell to 15.4% in April 2022 from 16.7% in March 2022⁷.

This pattern indicates, whilst online retail is here to stay, bricks and mortar retailing has a place and consumers are emerging from the pandemic and returning to prior behaviours and seeking offline and online experiences.

PROPORTION OF INDUSTRY GROUP TURNOVER ONLINE



In original terms, the proportion of online sales to total retailing fell 0.9%, from 10.9% in March 2022 to 10.0% in April 2022⁷. This is the lowest proportion of online sales to total retailing since May 2021, the last month prior to the Delta outbreak⁷.

10%
DECREASE IN PROPORTION OF ONLINE SALES TO TOTAL RETAILING



ENGAGEMENT

Engaging the consumer and holding a conversation for a period of time in a memorable way allows brands to develop strong relationships with potential customers. Insight into which consumer groups read print and how long they spend reading them or interacting with them is important in understanding the power of print marketing. Whether offering a comprehensive product range, brand positioning, new store or product offering, engaging your customers is critical when communicating your messages.



BINET & FIELD - BALANCING YOUR BUDGET

Binet and Field in their research have discussed the importance of brand building, especially in a digital economy, to increase effectiveness.



Binet and Field, leaders across brand equity and longevity, continue to develop their research in exploring the importance of brand building, especially in a landscape of emerging channels. Critical to the research and findings is building a balanced approach to marketing initiatives to optimise effectiveness and increased customer engagement results.

“Brand building is more important in a digital world than it is in the old economy,” Binet told delegates at the Advertising Research Foundation’s (ARF) 2019 AUDIENCExSCIENCE conference. In a keynote address to delegates, Binet asserted: “Most marketers have learned completely the wrong lesson. They’ve seen the efficiency of short-term activation and they put all their money in there.”

“But, in fact, what they actually should be doing is making digital activation work efficiently by supporting it with broad-reach, emotional brand building.”

Referencing the “60/40 Rule” that underpins much of the body of work Binet and Field have produced, Binet added: “Share of voice matters, but [what also matters is] how you allocate share of voice between brand building and activation.”

He said “there tends to be an optimum effectiveness” of 60% for brand building and 40% for activation in communications budgets.

The ratio, he allowed, is not an absolute, and may vary by category. “If brand building is easy in a category, you can dial down your brand spend. And if activation is easy in a category, you can dial down the activation spend.”

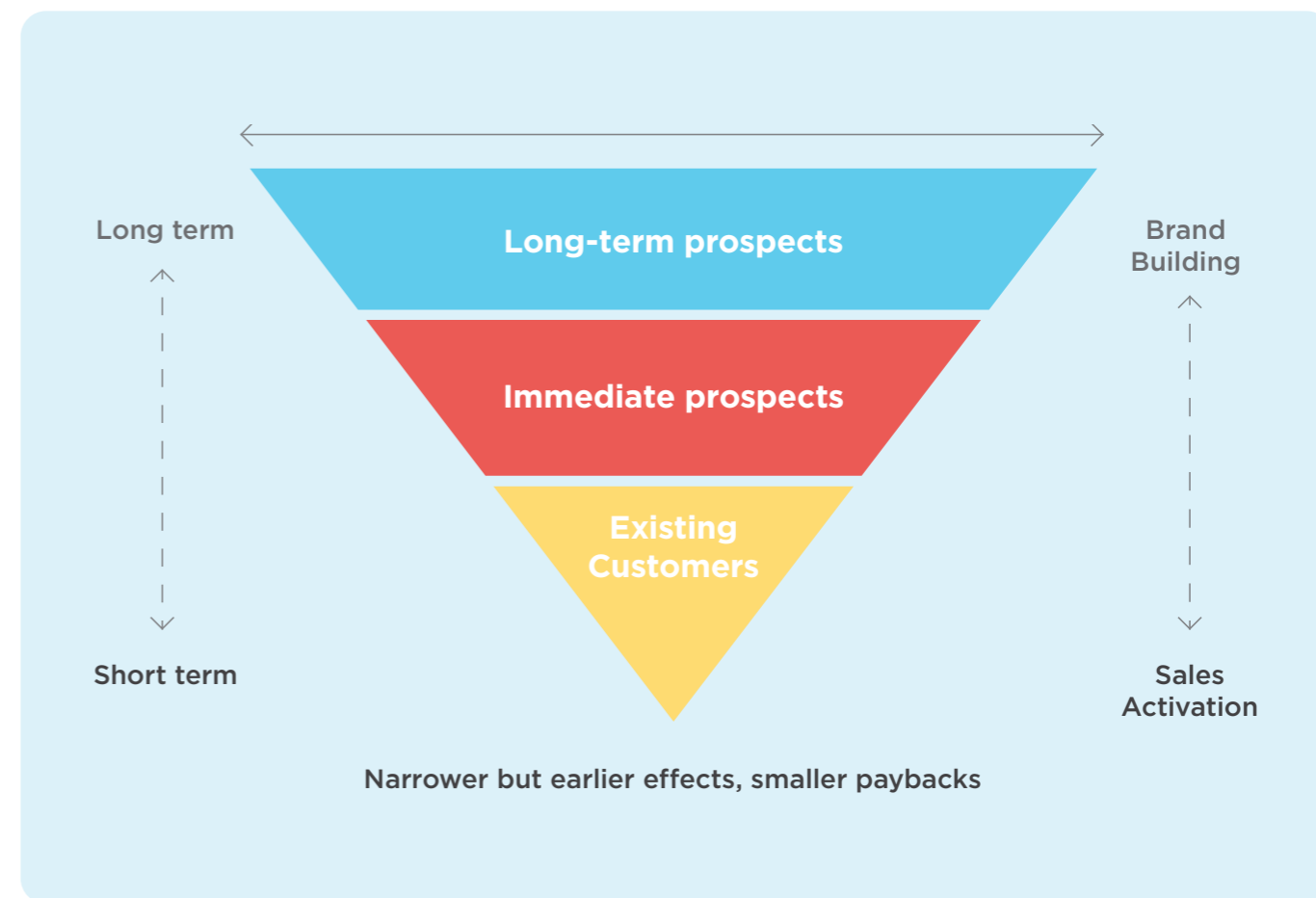
“In more specific terms, for categories where there is a high degree of product innovation – or, for brands, where there is a high degree of product activation – activation is easy.

“If you have really great new products, they’re actually quite easy to sell,” Binet continued. “So, you can dial down the activation and tilt towards brand, with a split that’s more like 70/30. In categories where there’s a great deal of online research (for example, holidays, where people will do research on Google, and on TripAdvisor, and on Booking.com) activation is easy, so you can dial it down and tilt towards brand, more like 75/25.”

On balance, Binet continued: “There are areas where it goes the other way... In a digital economy, there are efficiency gains to be made. There are areas you can cut the budget. But it’s actually the activation part of the budget you can dial down.”

Understanding the role established media plays across the brand versus activation and managing this mix is critical and a key strength of the role established media will play well into the future.

Sourced from WARC.



Binet and Field discuss the 60:40 rule, that splits the budget 60% for brand building and 40% for activation to deliver maximum effectiveness (Tom Roach, 2022).

They argue that a long term approach towards brand building delivers broader and bigger effects (Tom Roach, 2022).

Further they argue that campaigns that include a combination of print and digital have a 74% greater likelihood of driving major market share growth and are 58% more likely to deliver profit (M13, 2021).

Sources:
Tom Roach, 2022
Les Binet and Peter Field, The Long and the Short of It, IPA (Figure 22)

MAKE IT MEMORABLE

Engaging your customers in a way that creates memory and recall that aligns with your brand increase return on marketing investment.

All channels, not only established, must offer creative innovation to inspire information-rich consumers. We are limited only by our imaginations as technologies offer endless solutions for marketers and agencies.



SENSORY PACKAGING FOR THE VISUALLY IMPAIRED



Kellogg's has added a scannable code to its cereal boxes, helping people with sight loss to find the right products in the supermarket and making shopping more accessible. In addition, the 'Navilens' code allows anyone with a smartphone to scan the code from distance of 12 metres. Kellogg's is the first company in the world to use Navilens technology in packaging.



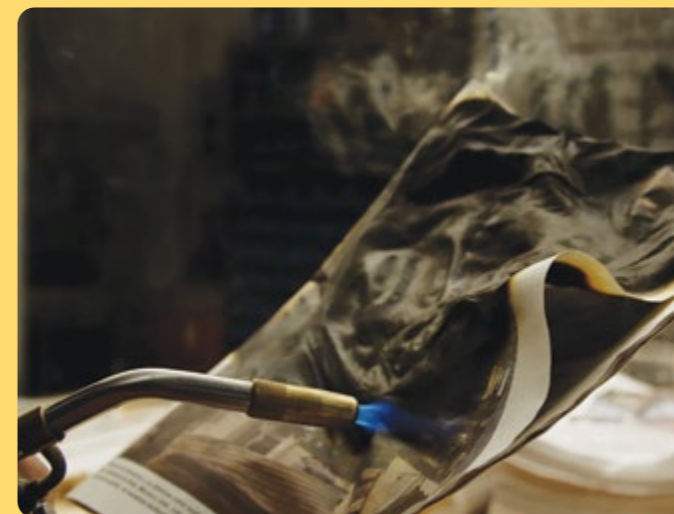
WASH DAY SUSTAINABILITY

Unilever recently launched their first paper-based bottles for their OMO laundry detergents in Brazil. With aims to reduce the use of single use plastic, the bottles are made from responsibly sourced wood pulp which are fully recyclable and compostable. The launch was made as part of their commitment to halve their use of virgin plastic by 2025.



WATCH STRAPS FOR THE ECO-CONSCIOUS

Luxury Swiss watchmaker IWC Schaffhausen have launched a new line of paper straps for watches. The 'TimberTex Straps' are made of 80% plant fibre, sourced from FSC-certified trees. The straps go through 60 manufacturing stages, resulting in highly luxurious straps that are durable, environmentally friendly, and water-resistant.



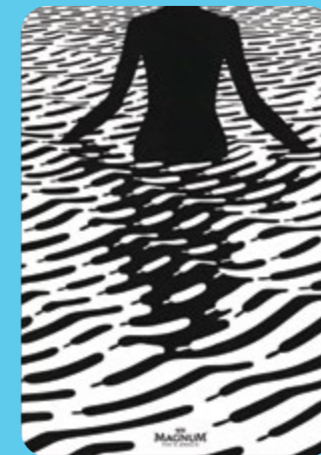
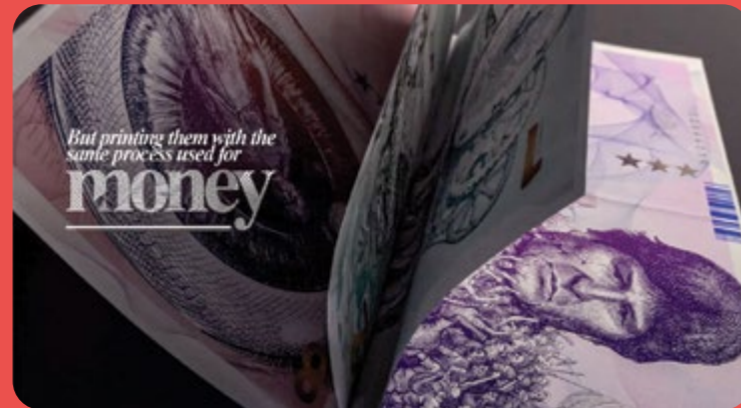
FIREPROOF NEWSPAPER

Argentinean ad agency Hoy Buenos Aires has created the world's first fireproof newspaper, spreading awareness about forest fires in the Patagonia region of Argentina - 95% of which are started deliberately, using newspapers. The campaign aimed to raise funds to donate to the Firefighters Foundation of Argentina.

MAKE IT MEMORABLE

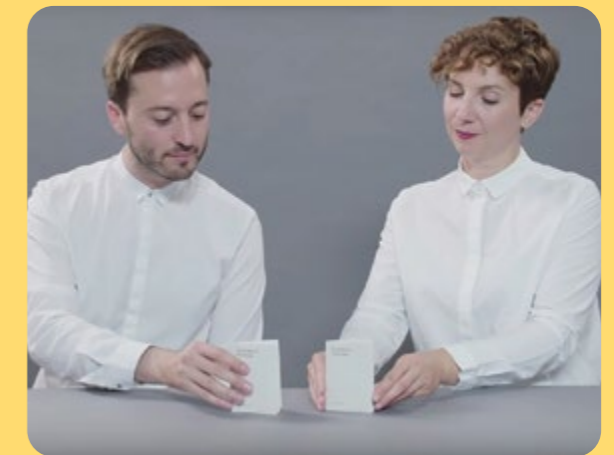
THE MOST VALUABLE NEWS

Latin America's largest newspaper Folha de S.Paulo set out to remind people of the important truth-telling role of newspapers in a world of fake news. They created a version of the newspaper that was identical to their currency to remind people that news is as valuable as money. The pages featured stories about the most recurring themes in the dangerous notion that is enveloping our world, fake news.



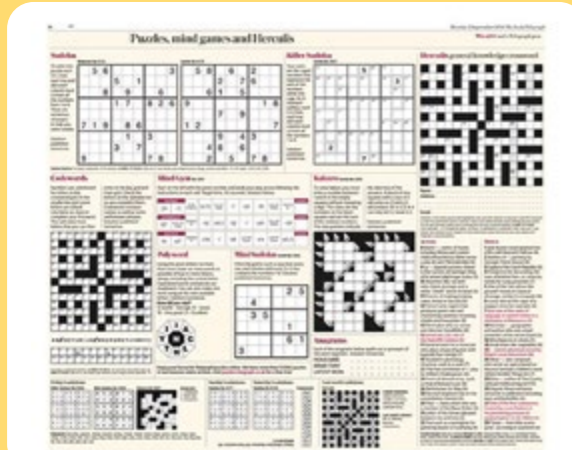
MAGNUM'S PLEASURE ICON

Sophisticated yet modern, sensual yet elegant, this collaboration between American sculptor and painter Brendan Monroe and Magnum is a truly mesmerising print campaign. The graphics are hypnotic and incorporate the iconic magnum ice cream shape in summer-like, female themed images. The illustrations were displayed in a series of posters and promotional materials.



GOOGLE'S PAPER PHONE

Google has created printable 'Paper Phones', to promote digital detox and combat technology addiction. The app prints out daily personalized and relevant information to be folded into eights, equipping users with everything they need for the day.



PRINTED PUZZLE HELPS LLOYDS CONVERT CUSTOMERS TO ONLINE

After the closure of multiple branches, Lloyds Bank has launched a campaign called 'Crossword Clues' to direct older customers to their online banking services. The campaign involves a series of print crosswords found in the British newspaper *The Telegraph*, with the answers revealing features of the app. The crosswords were effective, with 56% of readers visiting Lloyds Bank website and 44% using or downloading the app



THE TAMPON BOOK: A BOOK AGAINST TAX DISCRIMINATION

In 2019, the German organic female sanitary product company, 'The Female Company', printed books containing tampons in a move to protest tax discrimination. Tampons were taxed at 19%, the same as luxury items, but since books are taxed at 7%, the product helped women to pay less.

ADVERTISE OR DIE

Boardroom bosses are receiving a clear message from media owners via a multi-channel campaign that is calling out the importance of long-term advertising. With the tagline, 'If your brands not here it's nowhere', TV, outdoor, radio, print and digital industry bodies are emphasising the value of advertising to CEOs, CFOs and CMOs. Mark Ritson, campaign spokesperson, has three messages:

1. Continue to invest money in advertising.
2. Make sure at least half of your budget is invested on the top of the funnel and on long-term brand building.
3. Don't fall for the buzz around new, exaggerated media opportunities at the expense of proven long-term, brand building media.

This newspaper ad will work without a single click, like or share.
Old school.

advertiseordie.com.au

PATH TO PURCHASE

Understanding your customer's path to purchase allows you to refine your marketing campaigns and engagement strategies to deliver optimal results. Understanding your customer's purchasing journey allows you to create the most useful communication campaign for your customers.



CASE STUDY

CATALOGUE DELIVERS INCREASED MARKET SHARE



In September 2020, a major Grocery Retailer publicly announced removing letterbox catalogue distribution.

Following such a major announcement the major competitor of Brand B, we shall call Brand A, conducted an extensive national review of catalogues to ensure the channel's effectiveness.

This was a 14 week extensive research program in real time, real homes, real sales;

- > They found affluent suburbs realised double digit sales declines when removing catalogues.
- > They found metropolitan suburbs experienced single digit declines, or no difference.
- > When no difference was seen, recall was reduced, despite sales remaining stable.
- > Digital solutions, QR codes, online apps and hubs, reflected a minimal percentage of customers compared to the massive reach of letterbox marketing.

Since removing catalogues Brand B has heavily invested in a digital presence, in an effort to move consumers from the catalogue to a digital platform, from this Brand B has only gained 1 percentage point increase in market-

share. Comparatively, Brand B's major competitor, for doing nothing more or less than Brand B, across various marketing initiatives except keeping catalogues and letterbox marketing, has grown market-share by 4.4 points across the same period.

When understanding this is a \$125BN industry that equates to \$5.5BN in sales growth for Brand A and it's continuing.

So much so, that Brand B's store managers are hand delivering catalogues to homes surrounding their stores.

\$5.5BN
IN SALES GROWTH FROM CATALOGUES

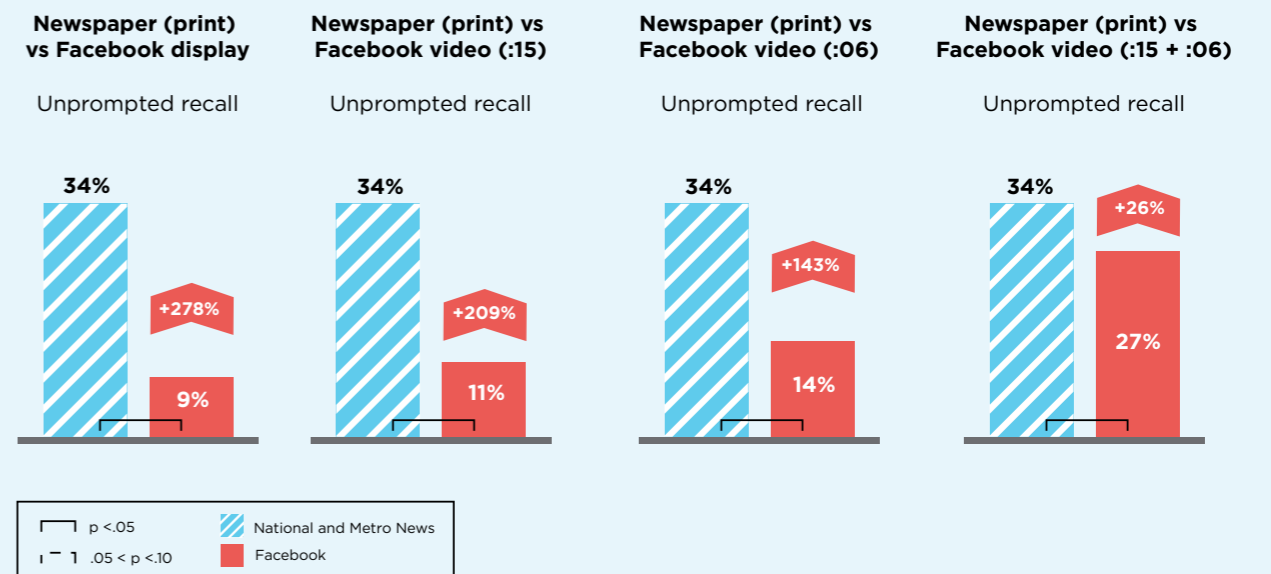


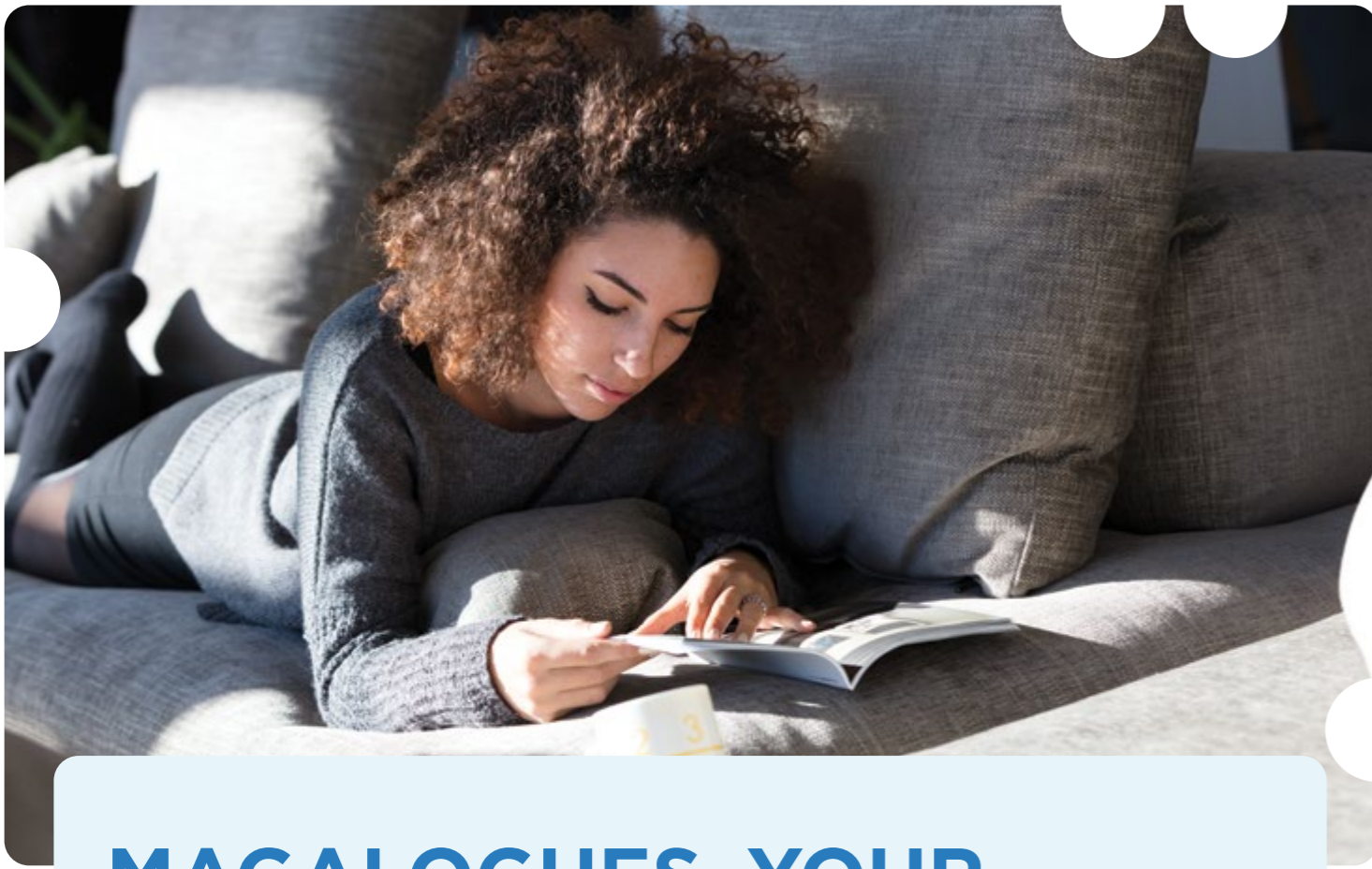
MASS MEDIA VS. FACEBOOK

ThinkNewsBrands has commissioned research to understand the role of Facebook v Newspapers assessing unprompted recall across newspapers and Facebook display and video. Consistently finding that newspaper advertising outperform Facebook and in the combined Facebook video, by up to four times. Recall and human engagement across offline channels offers a powerful strength of print media channels from newspapers to magazines and to catalogues. Overlooking the role of recall and brand loyalty of print media is something marketers building social solutions need to apply caution to.

IRRESPECTIVE OF FACEBOOK AD TYPE, ADS IN NEWSPAPERS OUTPERFORM FACEBOOK BY UP TO **4X**

Source: The benchmark Series: The powerful impact of placement. ThinkNewsBrands, 2021





MAGALOGUES—YOUR BRAND ON YOUR TERMS

With more and more brands building their own ‘mastheads’ and truly owning the end to end benefits of print media on their terms, consumers are now experiencing ‘free’ publications filled with rich content. Often self-funded or profit-centres, this new trend is a powerful tool for brands communicating on their own terms.

Magazine	Readership March 2022 (000's)	Readership March 2021 (000's)	Percentage Change
Coles Magazine	4,738	4,959	-4.5%
Fresh Ideas Magazine	4,542	4,462	1.8%
Bunnings Magazine	1,504	1,550	-3.0%

Source: Roy Morgan, 2022

64%

OF READERS PURCHASED A FOOD PRODUCT THEY HAVE SEEN IN **FRESH IDEAS** MAGAZINE⁸.

71%

OF READERS SAY THEY PURCHASE PRODUCTS FROM **COLES** SPECIFICALLY BECAUSE THEY WERE REQUIRED FOR A **COLES** MAGAZINE RECIPE⁹.

43%

SALES UPLIFT (ON AVERAGE) FOR **BUNNINGS** MAGAZINE'S FEATURED PRODUCTS¹⁰.

DAVID JONES

SOHANI FORSCUTT

Marketing Operations Manager

Sharing insights across the role of print in retail and brand marketing, Sohani Forscutt, Marketing Operations Manager, David Jones, builds the context of channel selection and when print is optimal.

HOW DOES A RETAILER DECIDE WHETHER PRINT IS THE RIGHT CHANNEL FOR THEM?

Print can be an effective channel to engage a new audience or a segment of an existing audience as a complimentary channel within a full funnel media program. Particularly within a known database of customers, print can provide a unique experience and function as a reward (i.e. free magazine with purchase) to these customers and inspire them in their journey to consideration and conversion. It all depends on how your audience consumes media and what channels work best for each segment.

HOW DO YOU GET STARTED?

It is very important to find the right partners in publishing, printing and distribution (including digitising print catalogues). You don't have to do it alone! Partners with the right experience and understanding of your brand can help to create something that works for you. It is important to set up these partnerships with the right intention so that everyone is incentivised to achieve the desired outcome. Once you have identified your target audience, you can create the content based on what is relevant to this audience.

HOW DO YOU MEASURE PRINT EFFECTIVENESS/WHAT DO YOU DEFINE AS EFFECTIVENESS?

There are multiple ways to measure the effectiveness of print. It all depends on what the objective of this channel is. At David Jones, we have utilised promotional discount redemption codes and QR codes to measure engagement within this channel. We have also used control groups within a direct mail distribution to assess incrementality, which has given us invaluable insights. Advertising has long helped fund print, as is what happens within magazine publishing and retailers can and should also consider this in measuring the effectiveness of print.



WHY PRINT (AND NOT ANOTHER CHANNEL) AND WHAT ARE SOME OCCASIONS TO USE PRINT?

Print helps us to gain access to talent and thought leaders that we would not be able to through traditional advertising channels. The content we produce is utilised across digital channels and across in store promotions, further increasing the return on investment. We have also successfully used the digital version of the printed magazine across paid media platforms such as Stocard and on our own website to enhance consistency and aid purchasing decisions. A printed magazine or gift guide can be very useful during key gifting periods such as Mother's Day, Father's Day and Christmas. In addition, it helps us present a wider product range, a point of view in market and provide useful edits as well as inspiring stories to our customers which we achieve through our award-winning Jones Magazine.

WHAT ARE SOME TIPS YOU WOULD GIVE TO OTHER RETAILERS TO ACHIEVE SUCCESSFUL OUTCOMES WITH PRINT?

Plan early with your partners, review results regularly, stay true to your brand and most importantly always inspire customers in the unique way that only you can. Whether it is print, radio, television or any other channel, the key is to understand how your target customers are consuming content by continuously testing, learning and evolving your media plan accordingly.

MAIL MATTERS

Recent research by Accenture commissioned by Australia Post, had some surprising revelations about the value of mail. The research shows that mail remains an effective and essential communication tool, helping businesses tackle the challenges of driving short-term results with long-term objectives like brand value and customer loyalty.



01

THE RESEARCH REPORTS, MORE THAN 80% OF PEOPLE READ MAIL IMMEDIATELY COMPARED TO 63% WHO OPEN EMAILS STRAIGHT AWAY.

The digital natives of younger generations, 18 to 35 years old, were more likely than older groups to report seeing mail as 'personalised' and 'considered' approach. Nearly two-thirds suggest that receiving mail provides a sense of affirmation that digital communications lack, making them 'feel important'. Compared to email, 81% of people are more likely to read the entire message 54% retain the message's information.

02

52% OF RESPONDENTS SAY IT SEEMS LIKE MAIL SENDERS TAKE THEIR INFORMATION MORE SERIOUSLY,

and 58% say they prefer mail for important information compared to 48% who prefer email. Respondents say mail makes them feel valued by a company, an opportunity to build emotional connections.

03

RESEARCH SUGGESTS THAT AUDIENCES ARE MORE LIKELY TO TRUST AND RETAIN INFORMATION WHEN THEY RECEIVE IT THROUGH MAIL.

It can be an ideal channel for communication that needs to convey detailed information such as operational, product or account updates.

OFFLINE AND ONLINE - ITS NOT ONE OR THE OTHER

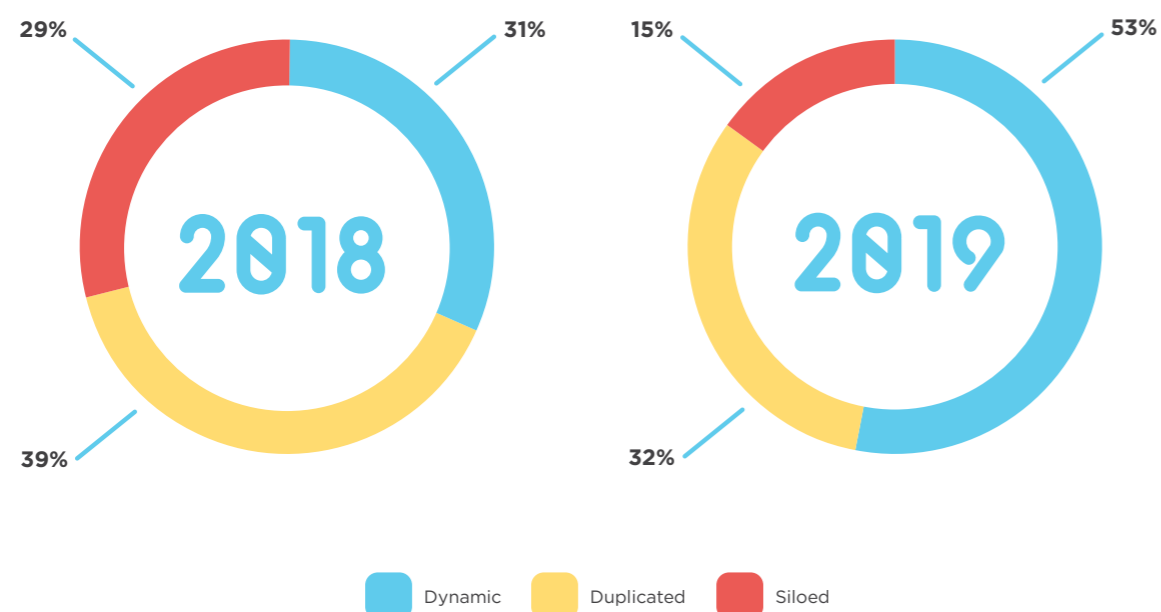
Salesforce, the largest marketing automation platform company in the world in their latest *Salesforce State of Marketing Report*, have found the strong value for offline channels. Salesforce, whilst digitally led, reports an insightful understanding and advisory for brands and marketers - do not ignore offline channels or the role they play in customer engagement and experiences.

The fundamental challenge of print in the modern era, it could be argued, is it has been positioned as an 'us or them' - print or digital. When in fact the two channels have a perfect marriage in their complementary characteristics. The strengths of print push to the strengths of digital channels and vice versa. Additionally, the inter-competitiveness within the stables of print and digital don't exist. Brands don't consider having a website or an EDM solution, they have both and they work hand in hand together. Advertisers don't think of having a catalogue or a magazine advertisement, again they build brand equity and sales acquisition simultaneously.

In a world where marketers and advertisers have a toolbox filled with sophisticated tools, now is the time to focus less on one or the other and more on optimisation of each channel at each phase of customer engagement and experience and each channel has a role to play to build innovative solutions across this.

CROSS-CHANNEL MARKETING IS CATCHING UP WITH CUSTOMERS

Marketers Who Describe Their Cross-Channel Coordination as Follows

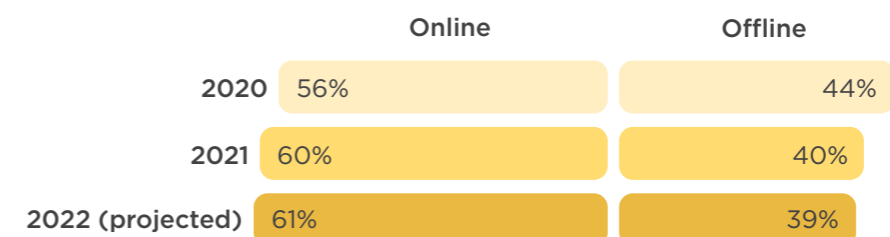


Consumer's have raised the bar on marketing and brands, they now demand more engagement and experiences than ever before and they are fluid across their channels. When online can be noisy and lacking emotional connectivity and recall, offline can build trust triggers and a 'physical human' element. Understanding how we enhance the experience offline and immerse online to develop unique and meaningful touchpoints is critical to building a powerful cross-channel marketing model for your brand and/or business.

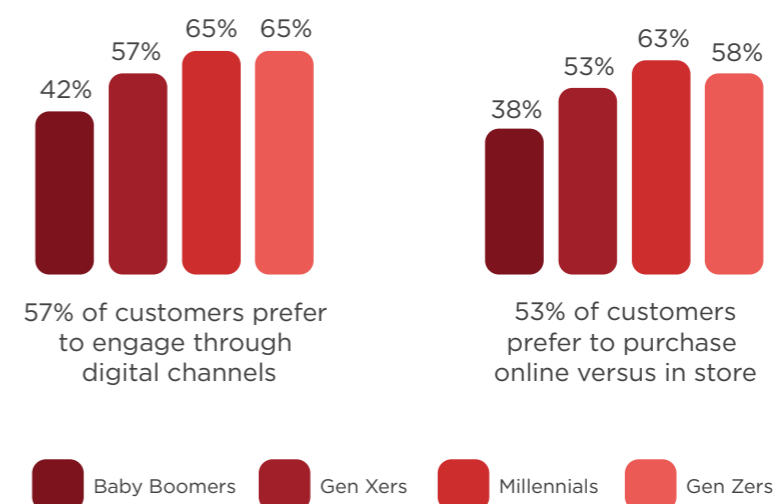
Online has a strong capability to distract and interrupt prospective customer groups, with offline holding a loyal engagement experience that is memorable.

DIGITAL ACCELERATION SPARKS DEMAND FOR PERSONALISATION AT SCALE

Customers' Estimated Split of Online and Offline Interactions with Companies



Social distancing accelerated consumer engagement with digital channels, of this there can be no dispute and the distribution volumes, consumer behaviours and uptake across online channels is reflected in the data of 2020. In 2020 56% Online v 44% Offline, realised a 4% online increase through COVID, to 60% v 40% respectively. However, as consumers have recovered this has slowed to 1% with 2022 projected, showing what other research is finding - consumers are returning to pre-pandemic behaviours.



This then is broken down further by Salesforce which shows consumer appetite for Online (57%), leaving an important 43% of consumers preferencing Offline channels. No marketer, advertiser or brand wants to ignore 43% of the market and this research reveals further the importance of forgetting the 'one or the other' and moving to a comprehensive cross-channel co-ordination across all activities.

Source: Salesforce, 2021.



EFFECTIVENESS

Effectiveness provides a snapshot of what is trending and delivering results as well as an opportunity to think outside the four walls of your marketing strategy workshops. Whether your goal is brand awareness or loyalty, sales and marketing targets, growth or communicating product range, a new store or even a product launch, achieving campaign goals and innovation often comes from exploring the journey of others. This is of significant importance when reaching for that extra idea or understanding the learnings of others.

CASE STUDIES OF SUCCESS

The best brands leading the industry sectors across their successful campaigns demonstrate the importance of not simply investing in the channel, but ensuring they optimise the channel with marketing and brand expertise – clarity of offering, product range, strategic frequency and more. Here are the best of the best across Grocery, Hardware, Pharmacy and Fashion. The top ten performers as recognised by the industry Association and peers.

CASE STUDY

GROCERY



8%

INCREASE IN SALES FROM PREVIOUS YEAR

ROMEO'S FOODLAND

Romeo's Foodland ran a seasonal holiday campaign aiming to showcase the brand as the destination for fresh and local produce so customers could have the 'freshest Christmas ever'.

This catalogue letterbox marketing campaign led to an 8% increase in sales from previous year.

HARDWARE

CASE STUDY

70%

SALES INCREASE FROM THE PREVIOUS YEAR'S CAMPAIGN

MITRE10

'Mitre 10' ran a national catalogue and letterbox marketing campaign targeting the serious DIYers in the age range of 25 to 54 called 'It's Time to Reno'. It aimed to inspire DIYers to start renovating to change the look of their homes through creative ideas and product savings with 'Mitre 10'.

This led to a 70% sales increase from the previous year's campaign which focused on a seasonal holiday window.



24.7% INCREASE IN SALES

13.37% TRANSACTIONS UP

10.08%

AVERAGE BASKET UP

TOTAL TOOLS

Total Tools for the first time targeted the 'Weekend Warriors' over a seasonal holiday window to get more families and DIYers along with the usual tradies, in-store. 'April Tools Deals' reminded the customers that Total Tools has what they need for the long-weekend.

Targeting different activities over the holidays to uplift sales of tools, gardening, home projects supplies or camping trips, Total Tools achieved a staggering 24.7% increase in sales. Along with transactions up 13.35% and average basket size up 10.08%.



PHARMACY

CASE STUDY

MY CHEMIST

My Chemist launched their 'Bloom! It's Mother's Day' catalogue for Mother's Day, focusing on increasing sales of their perfume range, which led to a 31% increase in the fragrances sales as compared to the same period in the previous year.

Further, total sales across all categories more than doubled as compared to the same period in the previous year.

The 15 page catalogue led to an increase in sales not only for the main product advertised but led to an increase in sales across all categories.

31%

INCREASE IN FRAGRANCE SALES



CHEMIST WAREHOUSE

Chemist Warehouse combined two important events of the Australian summer: Australian Tennis Open and School re-opening to produce the 'Grand Slam Savings' campaign, which led to a nationwide increase of 7% in sales as compared to the previous year.

Two brands that had a full-page ad, established brand and new brand, achieved sales increase of 8% and 782% respectively.

The massive sales increase with a letterbox-drop catalogue shows the immense marketing reach of catalogues, partnered with the marketing success of Chemist Warehouse.

7% SALES INCREASE COMPARED TO PREVIOUS YEAR

FASHION

CASE STUDY

ALDI SUPERMARKETS

ALDI launched the 'SNOW GEAR catalogue' promoting the ski gear available at their stores for customers to not have to compromise on quality whilst saving money. The campaign was targeted at budget-conscious families, avid skiers and boarders who enjoy a fresh look each season. The campaign was a huge success with people lining outside the stores before the opening time. 10% increase on sell through, an increase in YOY sales dollars over 15% for the ski gear category and almost 100% sell through on both adults and kids ski jackets. Further, an increase of almost 15% YOY sales across core range of groceries.

10%

INCREASE ON SELL-THROUGH



MYER

Myer launched the 'Feel Like New?' campaign to answer the questions 'What's new for me at Myer?', with a focus on 35+ women who need help navigating/interpreting new colours, brands and styles to suit them. An Omni-Channel approach with the catalogue acting as an anchor, this campaign was a success. Significant growth against last year, best results from 45-54 aged customers. Sales uplift per member targeted, at +5% and the shop rate was up by approximately +4% with an ROMI of x4.

+5%

SALES UPLIFT PER MEMBER TARGETED



TARGET

Target created a campaign called 'Denimland' to let their diverse customer base know that Target can be their number one denim destination, with high-end quality at affordable prices. As a result, sales were 8% higher than forecast, with women's apparel performing an outstanding 45% better than forecast.

WOMEN'S APPAREL

45%

BETTER THAN FORECAST



GRAND CENTRAL

'Grand Central' is a shopping centre located in regional city of Toowoomba in Queensland, which launched the 'Grand Central Winter' campaign inspired by the parks and gardens in the city targeting females aged 25-50 seeking inspiration for latest seasonal trends. As a result of the campaign, monthly sales saw a growth of 2.2% in apparel and 5.3% in cosmetics in July. In August, an increase of 10.6% in homeware sales, 1.2% in jewellery, 16.2% in apparel; and 11.6% in cosmetics across the shopping centre.

16.2%

SALES INCREASE IN APPAREL





KNOW
LEDGE

PRINT MARKETING

KNOW
LEDGE

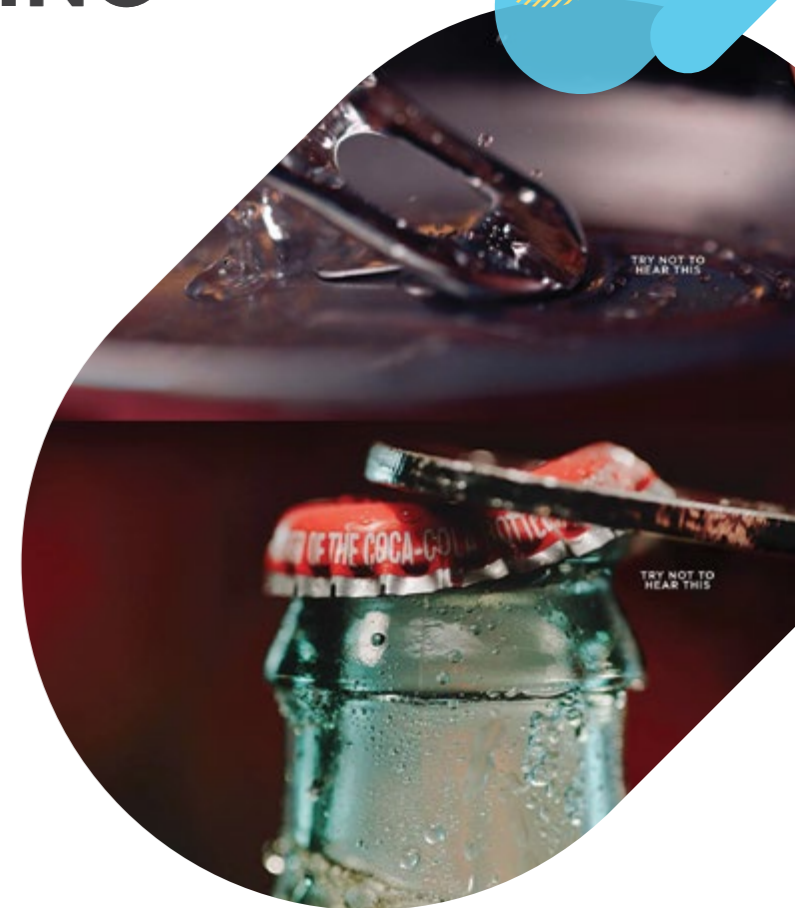
COCA COLA

Leveraging the notion that triggering one sense can create a domino effect for the other senses, Coca Cola produced its 'Try not to hear this' poster. The campaign created a series of posters with close-ups that showed a bottle or can of Coke being opened or poured next to the slogan 'Try not to hear this'. The idea was to entice the craving for a Coke—you see the ad, you hear the Coke being opened, and you instantly crave one. We've all been there.

Executive creative director at David, Juan Javier Pena Plaza, said the posters aimed 'to make viewers remember a sound that they've been told to avoid'.

"This is all about making them feel surprised that a printed image could make them hear, and subsequently, crave something," he said.

This bold campaign generated a whopping 86 million impressions and dozens of online conversations. Pointing to the power of a simple, intelligent print campaign.



STATS AND FACTS

- 1. Print Marketing**
 Providing the perfect platform for creativity and innovations, print remains a strong part of the marketing mix.
- 2. Catalogues**
 One of the oldest forms of marketing, catalogues are a highly effective sales driver with the weekly highest reach across all media channels.
- 3. Direct Mail**
 With an ROI of up to 40%, direct mail is one of the most effective marketing channels.
- 4. Magazines**
 With millions reading magazines every week, they are an ideal way to get your brand in front of a key target audience.
- 5. Newspapers**
 Marketing on a trusted platform like newspapers builds recall and helps consumers develop a deeper understanding.

5 REASONS

- 1. Creative**
 A lot of brands take advantage of the creative potential of print marketing with many using innovations such as lenticular inks, holograms, scented paper and embellishment add memorability.
- 2. Trust**
 Print holds a sense of legitimacy. The fear of spam, viruses and privacy invasion is enough to make people wary of clicking. Cybercrime has increased by 600% since the beginning of the global pandemic. It is predicted that ransomware will continue to become the number 1 threat. There is no imminent danger in picking up a printed brochure.
- 3. Switch Off**
 On average, users spend 6 hours and 13 minutes per day using their devices, whether it be watching TV, utilising social media or reading press media (Global Web Index). The amount of time 16 to 24-year-old users spent online jumped by 10% since last year. Switching off is needed now more than ever.
- 4. Luxurious**
 Luxury brands use print to get that exclusive look and feel. Finishes from foiling to spot UV can add a luxurious touch to marketing campaigns.
- 5. Hand in Hand**
 Print and digital work together and deliver optimal marketing results. Research consistently shows significant increase in ROI when print and digital marketing tools are adopted across one campaign.

CATALOGUES

3 SUISSES

According to the New York Times, catalogue mailings have been steadily increasing since 2015. Many brands and retailers are investing heavily in physical catalogues. Clothing brand 3 Suisses launched a new bi-monthly campaign featuring professional and artistically rendered product photography with high quality printing.

The company conducted the field experiment using a random 30% of its US-based customers. Of those customers, 55% of them received a weekly marketing email, and 40% of them received the new bi-monthly catalogues in addition to the weekly email marketing. Over 90% of the products were the same between emails and the catalogues.

Results showed that the 'email + catalogue' group experienced a 15% lift in sales and a 27% lift in inquiries. Furthermore, surveys by the company's staff found that over 90% of the customers have browsed through the catalogues and kept them for an average of seven days.



DIRECT MAIL

UP

At Up, they strive to create experiences that change perceptions of what a bank should look like and how it should act. In a world where instant digital satisfaction and gratification is rife, they want the physical interactions people have with Up to be potent. How could they crank up the heat on their current welcome pack?

Since they launched they've put a lot of effort into making the 'unboxing' experience of their mailers memorable but they wanted to kick it up a notch and use the next iteration as a chance to emphasise their brand values of sustainability, financial literacy and fun by making something that would bring endless joy to their customers.



5 REASONS

- 1. Building the Brand**
Catalogues offer the brand a significant amount of time with their customers, strengthening the relationship and building the brand.
- 2. Information-packed**
The catalogue is a lightweight and readily available source of information, with most questions answered within its pages. Price, look, colour, size, quality and performance can all be communicated quickly.
- 3. Accessibility**
The advantage of print catalogues is their ease of use, level of trust and accessibility. They are portable, aspirational and designed to be picked up repeatedly.
- 4. Effectiveness**
Working alongside direct mail, online and digital media, the catalogue's ability to have its results measured quickly and accurately is a significant advantage for the marketer.
- 5. Targeting Opportunity**
Since the main distribution method for catalogues is letterbox, targeting is a key element to ensure you are reaching the right prospect. Whatever demographic you are after, you can reach them.

5 REASONS

- 1. Make People Act**
Direct mail is the most likely form of communication to get a response with the cost of every response measured with accuracy.
- 2. Precision Targeting**
Direct marketing works best when it's made for the recipient, with tailor-made content appealing directly to the consumer. Digital printing technology now makes personalisation even easier.
- 3. Integration**
Adding direct mail to an integrated campaign can raise the campaign's effectiveness by up to 62% (BrandScience), while bridging technologies such as QR codes and augmented reality make it simple for consumers to go from print to digital.
- 4. Get Creative**
Direct mail is unique in that mailings can be produced in a wide variety of formats, using different shapes, sizes, colours and materials to create a surprising and memorable brand experience that will stay in the home for weeks and even months.
- 5. Effectiveness**
Reports have demonstrated the enduring effectiveness of direct mail, when compared to email, people are more likely to read the entire mail piece. (81% versus 63%)¹¹.

MAGAZINES

SANDWICH

Sir Kensington's, a Unilever brand of condiments, uses a quarterly magazine, Sandwich, to promote its products. The brand has the aim to reimagine ordinary and overlooked food with a level of integrity and charm.

Sandwich is written as a celebration of the often overlooked, but universally beloved culinary creation, the sandwich. It uses the humble sandwich as a springboard to explore the wider world of foodie culture—and the communities it brings together.

Each issue features a specific sandwich along with a cultural reporting, photo essays, and interviews on the most surprising and creative corners of the food world at large. The first issue pays homage to the BLT, possibly the greatest sandwich of all time. The imagery is extremely eye catching and engaging.

In the 2020 international CMA Awards the magazine won Gold in the Best Use of Print category, and the New York Times heralded it 'the magazine of culinary publications.' For a custom brand publication this piece demonstrates the power of brand equity ownership through custom media.



KNOWLEDGE

NEWSPAPER

THE DAILY STAR

In the late 2019, the Daily Star, a Lebanese daily newspaper hit back at the deteriorating political and economic situation plaguing the country by publishing a blank newspaper. Instead of filling its pages with the usual political tit for tat, the idea for the paper was to do nothing at all, exactly as the politicians were doing.

The edition had a blank eight page spread to create public interest, combined with the newspaper's editor-in-chief calling a press conference to encourage the people of Lebanon to use the blank sheets to write the future they wanted. This campaign was a huge success. It became the #1 trending topic on Twitter and it was discussed in over 100 international publications including the New York Times and the Washington Post.

The campaign generated over 500 million media impressions equivalent to 5 million in earned media. It was the best-selling edition for that newspaper, and most remarkably, a government was formed.



KNOWLEDGE

5 REASONS

- 1. Escapism**
Magazine readers love nothing more than taking the time to sit down with their thoughtfully curated content and indulge in some screen free reading time – taking in every single page!
- 2. Boost Your Brand**
More and more magazines are working with advertisers to position brand advertisements beside relevant content, creating a more integrated and reader friendly approach, sure to pique audience interest.
- 3. Inspiration**
From education and fashion to home and garden, magazines provide style, beauty and much needed inspiration to the reader.
- 4. Reach Your Target**
The design and placement of your company advertisements in publications, newspapers and magazines can help you reach your target audience, whether it be a niche market or the general public.
- 5. Sustainable**
As one of the most recyclable resources on the planet, paper has a huge advantage over other materials. A survey completed by Toluna found that 47% of 18-to-24-year-olds preferred to read magazines in print.

5 REASONS

- 1. The Ever-Popular News Medium**
The news reaches the majority of people every day. In the past year, print news readership has increased by 1.4%, reaching 11 million people¹².
- 2. Trust**
In the era of fake news that we find ourselves in, it is more important than ever to rely on trustworthy and timely sources of information. Printed newspapers can provide us with legitimate and truthful information.
- 3. Starting the Day Off**
54% of people read their news in the morning and 29% do so in the afternoon. News sets the daily agenda as over half of news readers have consumed the news before lunchtime¹³.
- 4. Multi Media Campaign Effectiveness**
Campaigns using newsbrands are significantly more likely to deliver share growth, profit, trial and loyalty, and reduce price sensitivity. Newsbrands also boost the effectiveness of other media—both 'legacy' media, like TV, and online video, display and social media. The effect is greater when both print and digital platforms are used.
- 5. Key for Advertising**
Print can sometimes be that point of difference that helps advertisers stand out in a crowded marketplace. Advertising on a trusted platform like press helps consumers build a deeper understanding of a story.



SUSTAINABILITY

The sustainability of any media channel must be assessed across three areas: environment, social and economic impact. Understanding industry employment figures, commitment to environment and economical sustainability is an important measure when understanding an industry's sustainable credentials.





CIRCULATING ECONOMIES

BY SAM UPTON

A TOOL FOR CHANGE

In practical terms, becoming circular means using what we have for longer rather than discarding and replacing. It means seeking to repair an item rather than buying a new model. It means recycling or upcycling instead of taking it to the tip. In short, simply throwing an item away shouldn't be an option.

Many - especially the makers of electronic devices and appliances - keep repair instructions a closely guarded secret and make it difficult for most people to access spare parts. This has led to an explosion in electronic waste (e-waste), which leapt to a gigantic 57.4 million metric tonnes (Mt) across the world in 2021.

That's equivalent to the weight of 350 cruise ships the size of the Queen Mary 2, and up by an alarming 21% over the previous five years. At the current rate, global e-waste will reach 74 Mt by 2030, making it the fastest

growing domestic waste stream in the world - a fact that should make everyone take a very different look at their devices.

THE ECO-CONSCIOUS CUSTOMER

The impressive fact about the circular economy is that people are actually more willing to buy from companies with strong eco-credentials. The research found that the choice of brands and products for one in five consumers is now defined by sustainability, with younger shoppers quicker to drop brands that don't meet their eco-preferences. In fact, 26% of 18 to 34-year-olds have stopped using a brand altogether in the past six months due to concerns about sustainability.

According to the Toluna research, the most important factors for shoppers are that the packaging is recyclable 80% and made of 63% bio-degradable material and 55% compostable materials.

THE ORIGINAL SUSTAINABILITY CHAMPION

Paper has the advantage of being produced by one of the most sustainable industries in the world, with one of the lowest greenhouse gas emissions. Between 2005 and 2015, European forests (where a lot of Australia and New Zealand paper supply comes from) grew by an area of Switzerland - and it's still growing.

Over the coming months and years, you will be hearing a lot about the circular economy, with companies, brands, and politicians keen to make their commitments to reuse, repair and recycle. But let's not forget that paper has been part of a circular economy for decades - and will continue to expand and develop its sustainability values for many years to come.

Source: Two Sides, 2022.

57.4M

METRIC TONNES OF
ELECTRONIC WASTE ACROSS
THE WORLD IN 2021

GLOBAL E-WASTE WILL BE
74 MT
(METRIC TONNES) BY 2030

1 IN 5

CONSUMERS PREFER
SUSTAINABLE BRANDS





LOVE PAPER

SUSTAINABILITY

CONSUMER PACKAGING PREFERENCES

Results of a recent Australian survey by Toluna reveal that paper-based packaging is favoured for being better for the environment, as consumers become increasingly conscious of their packaging choices.

69% of consumers prefer paper/cardboard packaging for being better for the environment, 50% believe it is easier to recycle and 72% prefer paper/cardboard because it is home compostable.

Paper/cardboard packaging is considered to be the most recycled material, 45% believing the Australian recycling rate to be over 60%. With an actual recycling rate of 87%, one of the leading rates in the world.

Consumers throughout Australia are willing to change their behaviour to shop more sustainably. 43% are willing to spend more on products if packaged in

sustainable materials and 43% would consider avoiding a retailer if they believe that retailer is not doing enough to reduce its use of non-recyclable packaging. 55% would purchase more from retailers who are removing plastic from their packaging.

66% of consumers prefer products to be delivered in a fitting packaging e.g. that is not too big for the size of the actual product and 51% prefer these products to be delivered in paper packaging.

55% think that non-recyclable packaging should be discouraged through taxation. 42% think that brands, retailers and supermarkets could be doing more to introduce more sustainable packaging and 53% think that brands, retailers and supermarkets are doing enough to inform people of their commitments and changes in relation to sustainability.

In Australia, 90% of our forests are certified as being sustainably managed, this is in comparison with the global average of 12%, impressive.

'GOING PAPERLESS' MAY NOT BE THE ANSWER CONSUMERS ARE LOOKING FOR

Fair and balanced representation of paper and paper products is being scrutinised as marketers are being challenged with unsubstantiated claims such as 'go paperless' or 'go green'. However, paper has a strong social and environmental argument - renewable, recyclable, carbon storing, high employer and also preferred by consumers.

A survey conducted by Toluna, in 2021 found that 78% of Australians believe that consumers should have the right to choose how they receive communications from financial organisations and service providers.

61% believe that they should not be charged more for choosing a paper bill or statement. 3.56% of Australians believe that when a service provider wants them to switch from paper to electronic bills and statements, they know that the company is really trying to save costs³.

91% of Australians over 65 years of age think that consumers should have the right to choose how they receive communications from financial organisations or service providers³. 62% of 18-24-year-olds think this too, challenging the myth that only certain sectors of society are looking to mail for information³.

During the 2020-21 financial year, over 67,500 cybercrime reports were made via ReportCyber, an increase of nearly 13% from the previous year¹⁴. In 2022, 59.4% people have reported scams through digital channels as compared to 1.3% through mail¹⁵.



ACKNOWLEDGEMENTS

The Real Media Collective would like to thank all our members, retailer, brands and agency friends who support our industry, our Real Media Awards and our industry association. Without you we wouldn't exist and your support to all that we do is truly valued.

To each and every report we have referenced throughout this document, thank you. The contributors, experts, researchers and brands sharing their learnings benefits us all. Should you wish to be a contributor of future publications please contact hello@thermc.com.au, we would love to include your voice.

And last but not least, a special thanks to our Patron Members - Australia Post, IVE Group and Ovato. Your ongoing leadership across the industry and the industry body is a testament to the people representing your brands and it is a privilege to work with organisations such as yours.



PRINT PARTNER



Additional thanks to IVE Group for printing these reports for our audiences.

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