the·real·media·collective

THE REAL MEDIA COLLECTIVE

INDUSTRY INSIGHTS REPORT

NEW ZEALAND

IN THIS REPORT

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. The Real Media Collective Australia announced in 2022 a merger with the peak industry body, the Print & Visual Communication Association of Australia. At the time of writing this report, the merger is in process. The Real Media Collective New Zealand was formed as an independant entity in 2022 with secretariat partnership with Australia.

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 print 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 New Zealand.

www.therealmediacollective.co.nz

EXECUTIVE SUMMARY

As we navigate our way from 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, we now expand our horizons. As we do, the role of print media and its interaction with digital channels is critical to understand.

As consumer patterns re-emerge and settle to a new 'normal', this report leads us to ask some important questions. How are consumer 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 slice of the marketing budget?

This report explores the successes and opportunities of real media channels delivering results from a consumer 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 in 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 from digital that we can replicate through a multi-channel universe.

Consumer behaviour is changing; however, we know magazine engagement is increasing, with the average Kiwi spending 62 minutes reading a magazine, an 11% uplift from 2020-2021. A report by *'Read NZ'* found that 17% of New Zealanders read digital and printed material simultaneously, and 82% read both online and print content each week. The channels are often used together, so how can we ensure the two interact more intelligently?

Print mediums create higher rates of recall and engagement than digital channels. A study commissioned by the *News Publisher Association* found New Zealanders, monitored with brain imaging technology, had higher levels of focus and emotional intensity when engaging with newspaper stories and advertising than they did with TV. When customers recall your products, they are more likely to purchase.

Print holds a sense of legitimacy for consumers amidst a landscape of misinformation and cybercrime. A comparative survey by the New Zealand Journal of Social Sciences found that only 51% of New Zealanders trusted news they found online, and trusted online information at almost a 15% lower rate than the other 38 surveyed countries.

Alongside public broadcasters, newspapers were found to be the most trusted mediums. One in three Kiwi's experienced cybercrime in the past year and there has been a notable increase in scams, with the organisation *NetSafe* reporting a 20% increase in complaints of online fraud and scams from 2021 to 2022.

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 packaging is favoured for being more environmental - 38% of Kiwis are willing to spend more on products if packaged in sustainable materials and 47% would consider avoiding a retailer if they believe that retailer is not doing enough to reduce its use of non-recycling packaging. Further, 57% of New Zealanders prefer online packaging to be fibre-based. And supporting these statistics is evidence, paper-based media channels' renewability, recyclability and compostability credentials are recognised and understood by consumers.

All that said, 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 catalogue 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

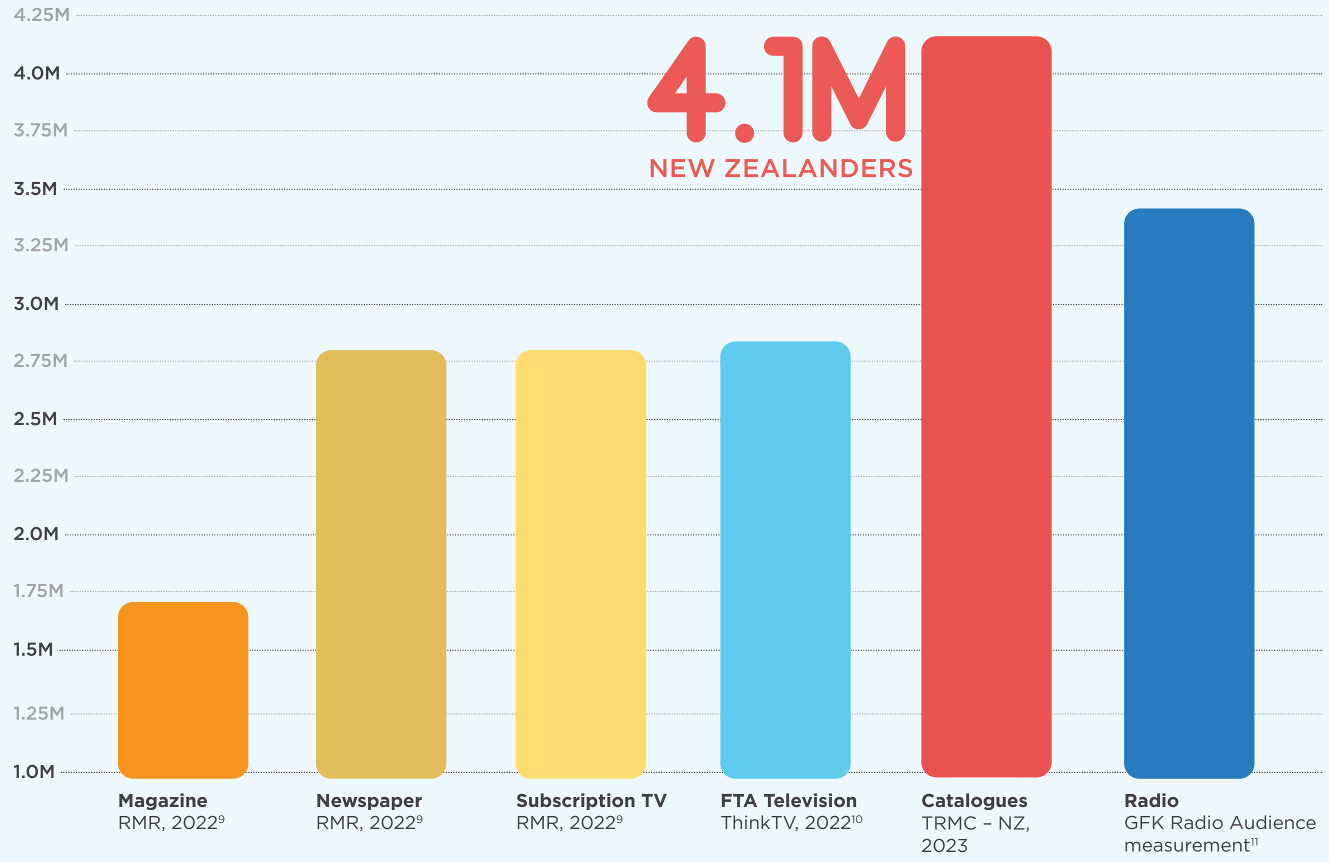
Kellie Northwood
Chief Executive Officer
The Real Media Collective

Sources: *Kantar Media Trends, 2021.*
Toluna Survey, 2021.
Nielsens Consumer & Media Insights, 2022.
Read NZ Reading In A Digital Age Report, 2019.
News Publisher Association 'Newspaper Advertising Sticks' ,2021.
New Zealand Journal of Social Sciences 'In Media We Trust? A comparative analysis of news trust in New Zealand and other Western media markets', 2021.
The 2022 Norton Cyber Safety Insights Report.
NetSafe Annual Report 202

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.

READERSHIP AND REACH



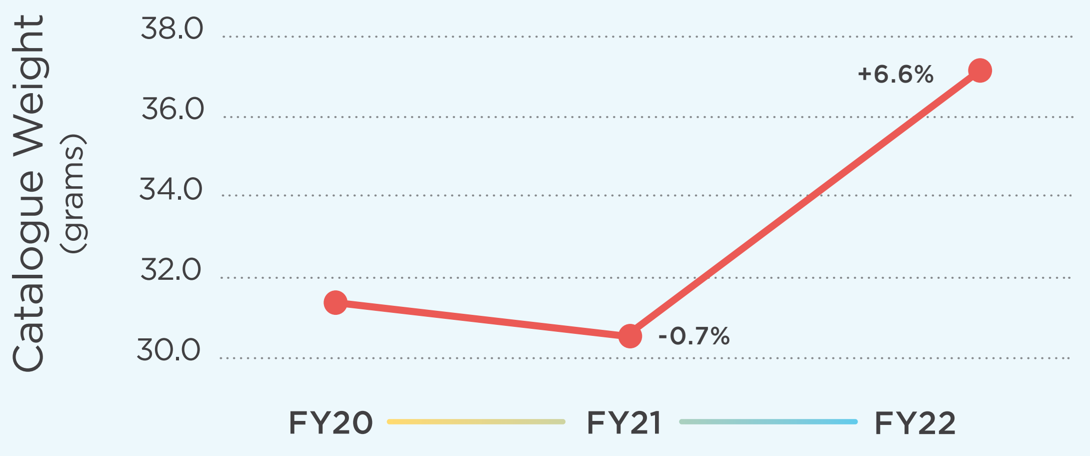
CIRCULATION

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

20%

THROUGH THE PANDEMIC



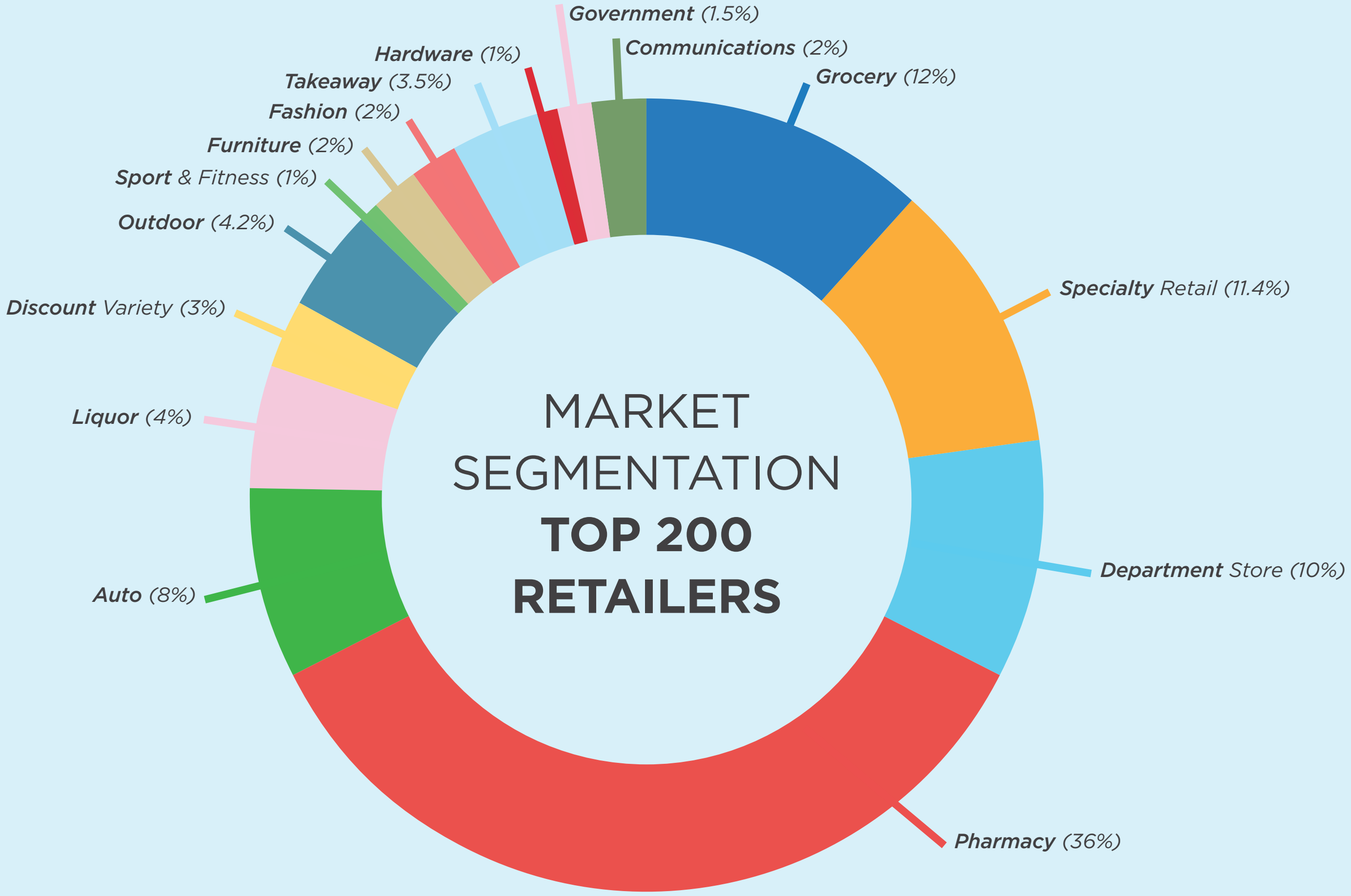
MARKET SEGMENTATION

The pandemic chapter, trends in pagination and design shifts reflect minor changes in segmentation with sectors re-emerging with forecasted schedule increases. The dominance of Pharmacy, Grocery/Specialty Retail and Fashion/Department Store remain firm.

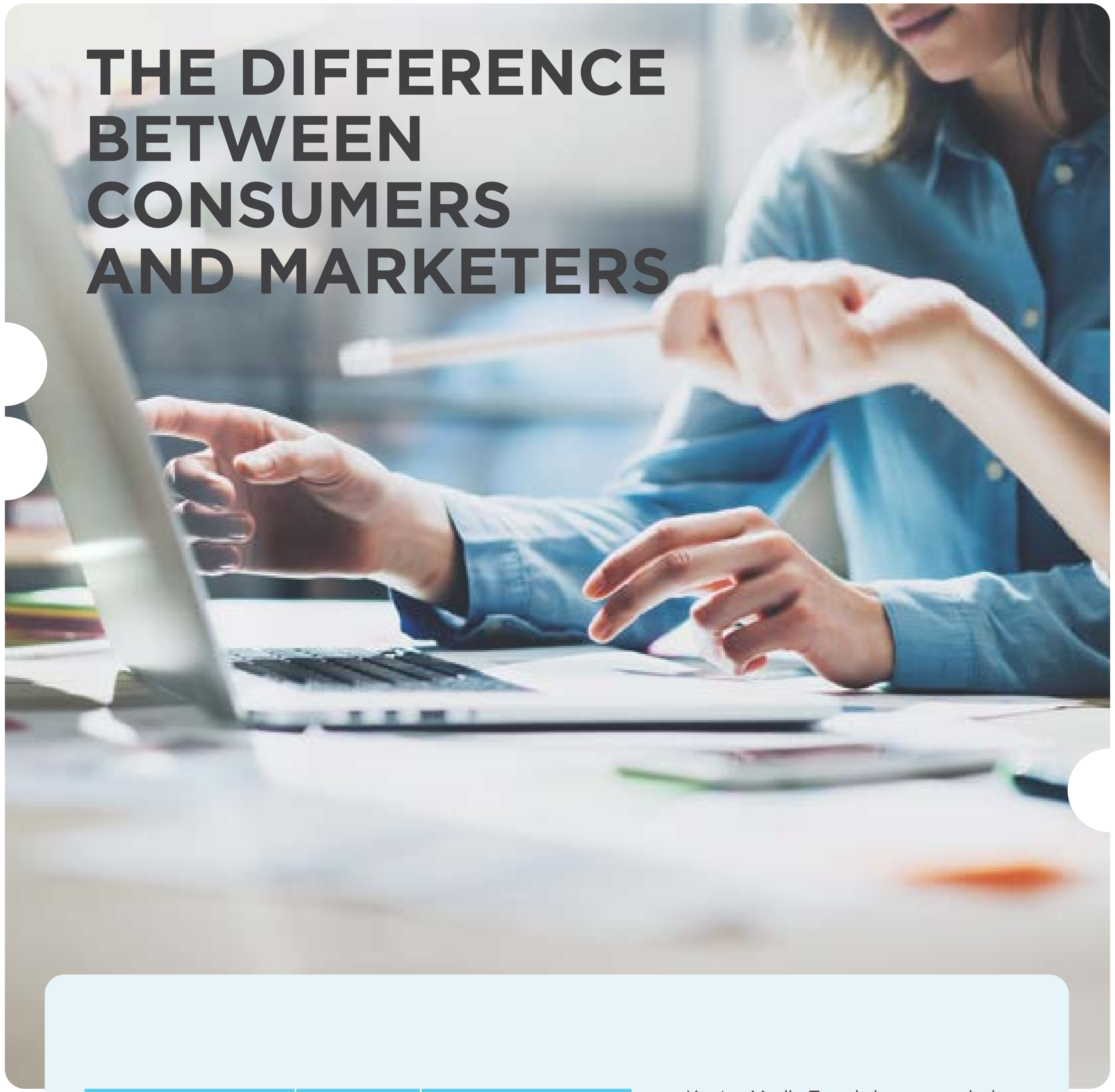
The Pharmacy sector demonstrate their expertise in the acquisition funnel utilising catalogues and letterbox distribution to re-enforce brand messaging, acquisition and recall with frequency, format and sales messaging to retain loyalty and attraction to store – online and physical. Increased market-share being realised by pharmacy brands within the catalogue and letterbox distribution sector is proving a powerful success story for the channel.

Grocery and Specialty Retail has seen an 'in/out' trend leading into and throughout the pandemic. Countdown left the channel, only to return due to sales and recall declines, with speciality retailers looking to change frequency from sales to seasonal, only to return to sales acquisition once more. These trends, partnered with trial periods, have delivered insights and consumer patterns not before reported which has seen retailers re-invest with more targeted distribution, alignment with digital campaigns and refinement in the recirculation across the acquisition funnel to build the long-tail of customer engagement and ultimate purchasing.

Automotive and Hardware are seeing shifts into custom publishing with quarterly magazines building brand authority across DIY and advisory publications that are brand owned. Mirroring success across the grocery customer publication sector, this is a growth sub-sector of the catalogue channel replicating international trends.



***Source:** TRMC NZ, 2023*



THE DIFFERENCE BETWEEN CONSUMERS AND MARKETERS

Consumers	Preference	Marketers
Cinema ads	1st	Online video ads
Sponsored events	2nd	Social media stories
Magazine ads	3rd	Influencer content
Point of sale ads	4th	Television ads
Newspaper ads	5th	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 magazines continue to remain stable as a mass channel and receive superior readership in New Zealand over their digital counterparts. However, with time we are seeing digital magazine and cross platform readership increase. While print remains the most attractive option due to its reach, its higher levels of engagement and its position as a preferred channel for consumers, combining channels and using them together allows for maximum reach and alignment with consumer trends.

THE TIME NEW ZEALANDERS SPEND READING AND ENGAGING WITH MAGAZINES IS INCREASING. KIWIS SPENT AN AVERAGE OF 62 MINUTES READING A MAGAZINE FROM 2020-21, UP 11% FROM THE PRIOR YEAR.

Source: *Nielsens Consumer & Media Insights 2020-2021*

Year	Print Readership	Online Readership	Cross-platform Readership
2020 (June end)	1.76M	804K	2.28M
2021 (June end)	1.49M	813K	2.02M
2022 (June end)	1.37M	935K	2.06M

Source: *Roy Morgan 2018-2022*

This data is based on the readership of the Top 10 Magazines in New Zealand over time. Print is average issue readership, digital is average website visitation and usage in last 7 days for weekly titles and last 4 weeks for all other non-weekly titles. Cross-platform audience is the number of New Zealanders who have read or accessed individual magazine content via print or online.

PACKAGING

46%

OF NEW ZEALANDERS ARE ACTIVELY TAKING STEPS TO INCREASE THEIR USE OF PAPER PACKAGING.

38% of New Zealanders would be willing to spend more on a product if it were packaged using sustainable materials.

58% of New Zealanders would buy more from retailers who are removing plastic from their packaging.

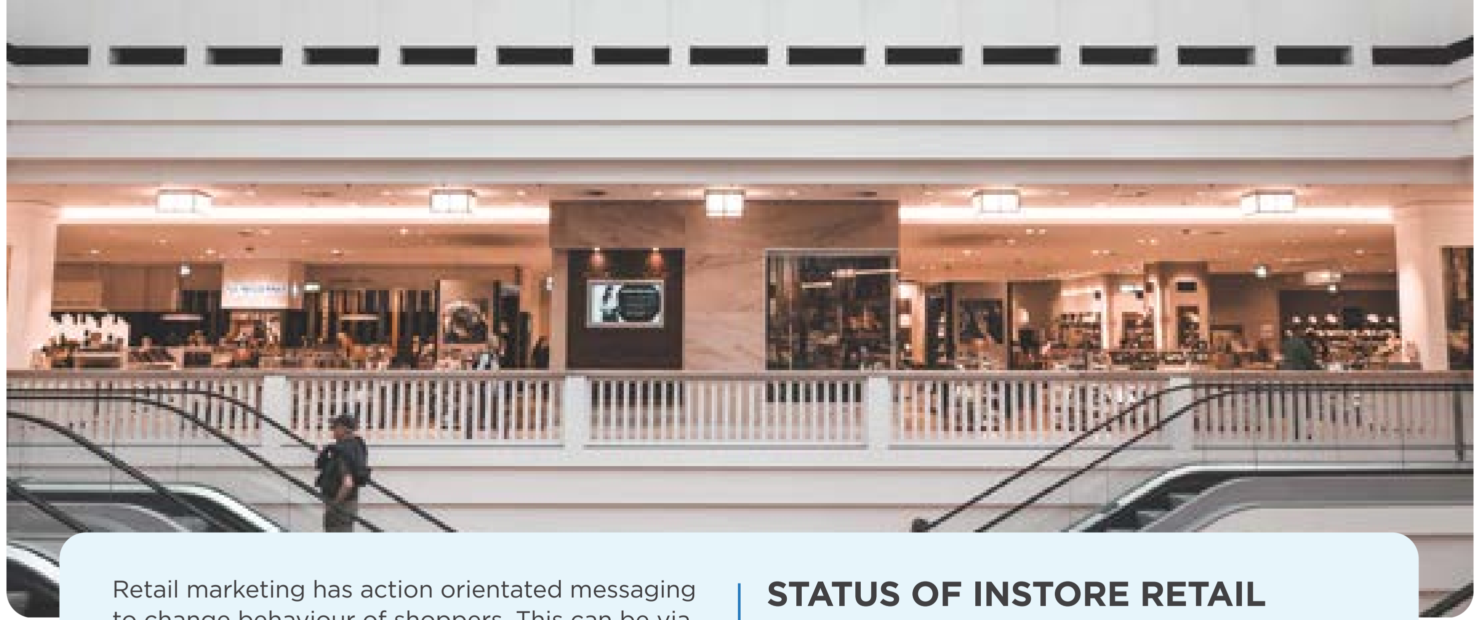
57% of New Zealanders prefer products ordered online to be delivered in paper packaging.

47% of New Zealanders would consider avoiding a retailer if they knew they were not actively trying to rescue their use of non-recyclable packaging.

59% of New Zealanders think that non-recyclable packaging should be discouraged through taxation.

Source: *Toluna Survey, 2021*

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 basis.

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

72% of shoppers at supermarket queues make impulse purchases.

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 2021.

STATUS OF INSTORE RETAIL MARKETING IN BRAND ORGANISATIONS

(Top 2 Box Agree/Completely Agree)

Source: *Shop!ANZ, 2021.*

TOP ADVERTISING IN THE CHILDRENS SECTOR: DIGITAL, PRINT + TELEVISION

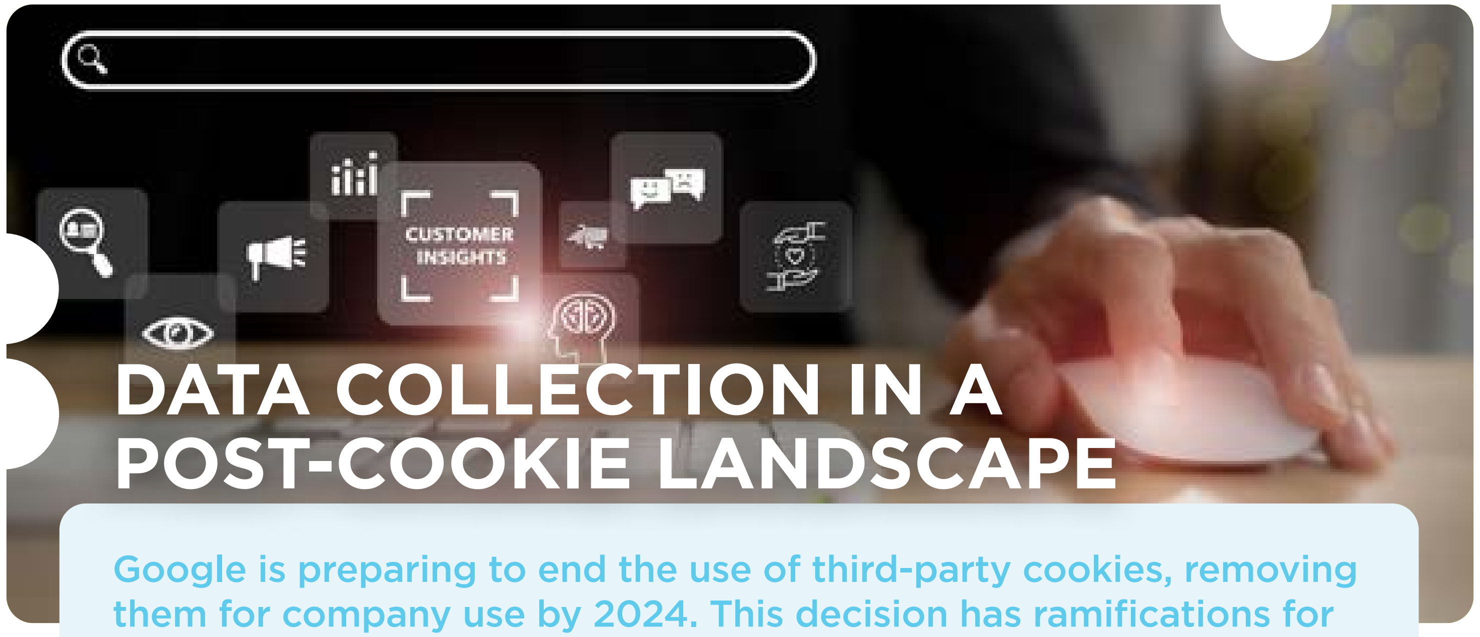
Children and toy brands are are increasing their advertising investment, with the top 3 channels being invested in being Digital, Print and Television across the major global brands.

The global baby boom is a contributing reason to why Children's brands are investing significantly in their marketing and advertising, as they re-emerge post-pandemic. Media Radar reported a 50% increase in advertising spending in the United States in 2022 across children's brands in the categories of Toys & Nappies. This was a total spend of $1.6 Billion USD.

Companies, Lego, Pampers, Zuru, Huggies, and Hasbro are deploying cross-platform approaches to maximise their reach and optimise their ROI. Inevsting the greatest funding into consistant channels across the sector: Digitl, Print and Television.

BRAND	CATEGORY	SPENDING	CHANGE Y/Y	MEDIA USED
LEGO	Toys and Games	> NZD 100m	↑	•Digital •Print •Television
Pampers	Diapers/Nappies	> NZD 100m	↑	•Digital •Print •Television
ZURU	Toys and Games	< NZD 100m	↑	•Digital •Print •Television
HUGGIES	Diapers/Nappies	< NZD 100m	↑	•Digital •Print •Television
Hasbro	Toys Conglomerate	< NZD 100m	↑	•Digital •Print •Television

***Sources:** Media Radar 2023, Stats NZ 2020 & 2022*



DATA COLLECTION IN A POST-COOKIE LANDSCAPE

Google is preparing to end the use of third-party cookies, removing them for company use by 2024. This decision has ramifications for advertisers and brands who depend upon them to track the web activity of potential customers and develop data bases to assist in their marketing strategy.

The decision was in part born out of growing consumer concerns about the over collection and misuse of personal data.

So, how can marketers ensure they respond to consumer concerns and adjust to the changing landscapes while still fulfilling their data targets?

One option for a digital solution is *'Google Topics'*, Privacy Sandbox's new approach to interest-based advertising. The software works through determining a series of topics based on the user's main interests over the past week, deduced on their browsing history. Topics are only retained for three weeks and then deleted, and users have more control over their own information, and able to more easily see, and control, how their data is shared.

A traditional solution are to rebuild and strengthen data collection, of loyalty programs, an excellent way to grow and retain customers and build trust and loyalty.

Kiwis are a big fan of loyalty programs, with 97% of the population signed up as a member of at least one retail loyalty program according to *StuffNZ*. While this provides retailers with excellent information and knowledge about their customers, they are often not turning this into real results and understanding consumer preference is essential.

Research by *Visa* found that 74% of customers prefer loyalty programmes that offer smaller, and more accessible rewards with the ability to redeem more frequently. Swapping out slow rewards programs requiring customers to save for bigger rewards over time for this preferred method will add more satisfaction and positive association with your brand. This is even more true for Gen Y, with 82% preferring small options.

Catering to consumer preference will improve consumer engagement and sales over time as customers build positive association with your brand and grow excited to return to your business to receive their rewards. Managing and building data is the leading quality to identifying customer preferences and can be across multiple platforms.

***Sources:** NZ Business 'Kiwi's Worry About Their Identity Survey', 2023.*
Stuff NZ 'How Businesses Can Disrupt Traditional Loyalty Programmes', 2023.
Cyberclick 'Google Topics, What It Is And How It Will Work In Cookie Free Advertising', 2023.

78%

of New Zealanders are concerned about the protection of their identity and the use of personal data by organisations.

50%

of New Zealanders have adapted their online behaviour due to concerns around data privacy.

60%

of New Zealanders don't feel they know how to protect their personal information properly online.

***Source:** Digital Identity New Zealand Survey 2023*

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 any marketing channel. 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.

74%

MARKET-SHARE GROWTH WITH PRINT AND DIGITAL.

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) 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 marketing 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.”

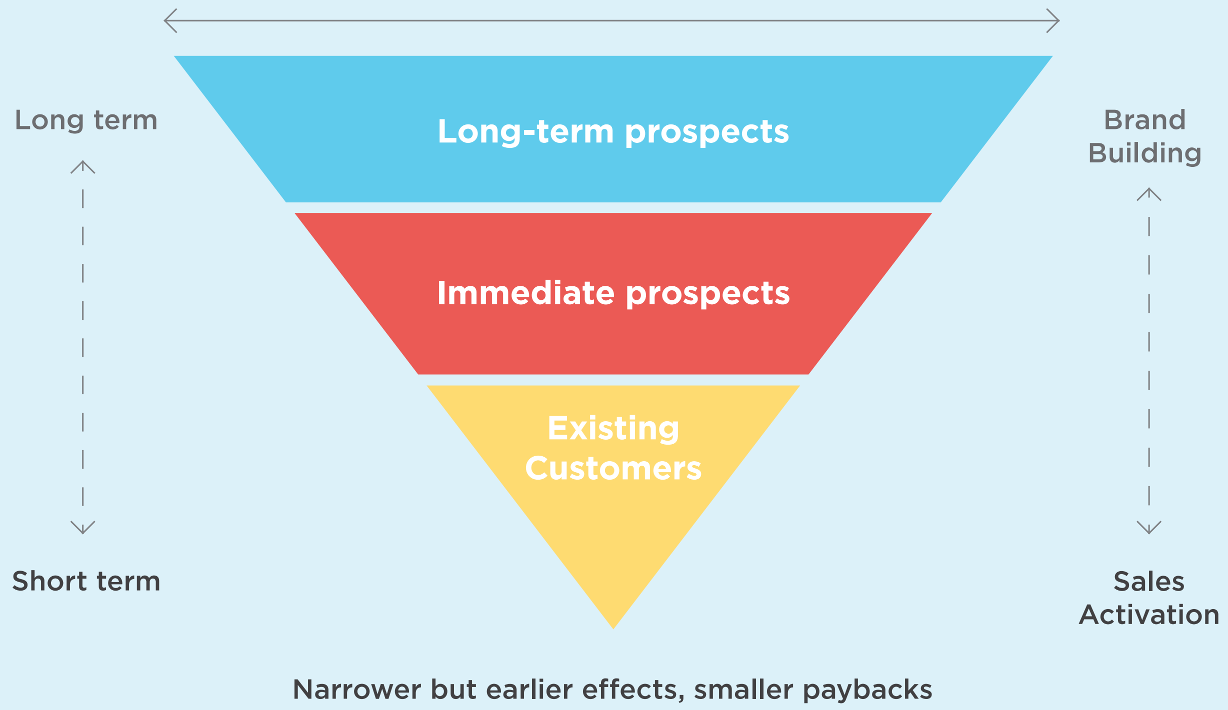
“In more specific terms, for categories where there is a high degree of product innovation–or, for brands, where there is a high degree of product activation–activation is easy.

“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.

Source: *WARC, 2021.*



Source: *Les Binet and Peter Field, The Long and the Short of It, IPA (Figure 22)*

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

They argue that a long term approach towards brand building delivers broader and bigger effects.

Further they find that campaigns including 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.

Source: *Tom Roach, 2022*
Mi3, 2021

MAKE IT MEMORABLE

Engaging your customers in a way that creates memory and recall that aligns with your brand, increases 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.

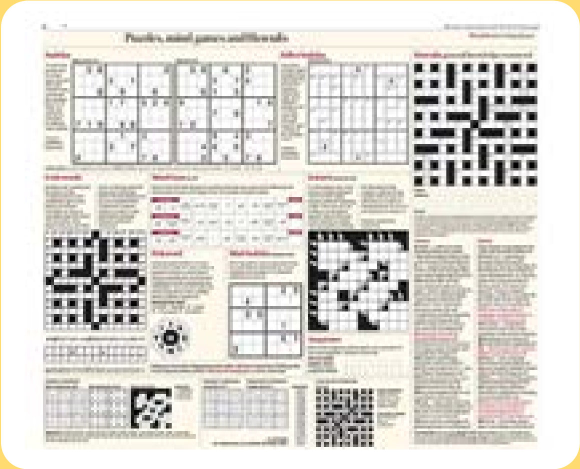
FIREPROOF NEWSPAPER

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. 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 Fohla 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.



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

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.

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.

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.

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

Brands that employ a cross-channel philosophy perform better than those who do not. This statement is exemplified by a case study of two major grocery retailers.

A major grocery retailer (Brand B) decision in 2020 to remove catalogue and letterbox from their marketing mix led an industry competitor (Brand A) to assess the performance of the channel.

Brand A led an extensive, national review of catalogues over a period of 14 weeks to ensure the channel's effectiveness. Entering homes and making real sales, all without catalogues, the Brand made a series of findings.

- Double digit sales declines occurred in affluent suburbs without the presence of catalogues
- Single digit declines or no difference occurred in metropolitan suburbs
- When no difference in sales were seen, recall was reduced despite stable sales
- Digital solutions such as QR codes, online apps and hubs, led to a minimal percentage of customer engagement compared to the massive reach of letterbox marketing

Since removing catalogues, Brand B has heavily invested in a digital presence. Despite their efforts to move consumers from their catalogues to digital platforms, 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 marketshare increase 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.

Source: *TRMC, 2022*

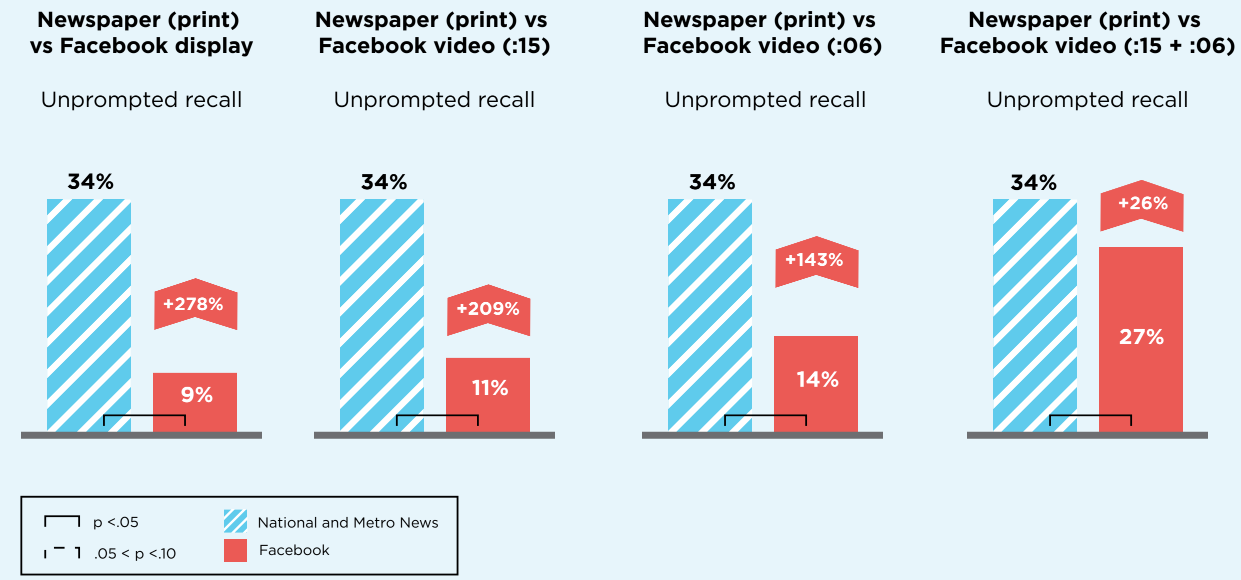
$5.5BN
IN MARKET SHARE FROM CATALOGUES

MASS MEDIA VS. FACEBOOK

ThinkNewsBrands 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.

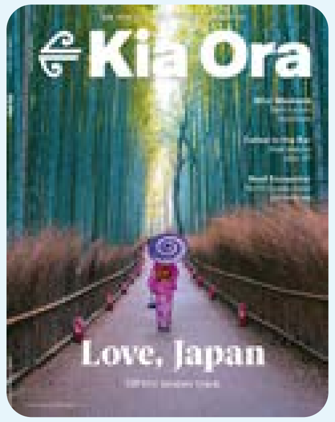
IRRESPECTIVE OF FACEBOOK AD TYPE, ADS IN NEWSPAPERS OUTPERFORM FACEBOOK BY UP TO 4X



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 owning the end to end benefits of print media on their terms, consumers are now experiencing 'free' publications filled with rich content. Often profit-centres, this new trend is a powerful tool for brands communicating their message direct.



KIA ORA

A premium custom in-flight publication produced by *Are Media* for Air New Zealand. The magazine has an informative and entertaining tone, with a range of stories and columns on food, destinations, and culture, showcasing the best of travel in New Zealand and the airlines flight network. This publication assists Air New Zealand in connecting to a highly desirable audience of travellers, positioning itself as the best magazine for reaching people with an income over $200k. The content reaffirms the airlines brand values, and mission of 'connecting New Zealanders to each other and the world'.

Readership: 265,000
6.5% of New Zealanders aged 15 and above

AA DIRECTIONS

AA Directions is a custom publication produced by the New Zealand Automobile Association. It is New Zealand's most widely read magazine and its success could be attributed to its wide diversity of stories; showcasing not only expert knowledge of motoring but colourful, interesting features on travel, environment, arts, culture, and more. It is primarily circulated to the organisations membership and is an effective way of keeping their brand in the conversation and engaged with.

Readership: 931,000
20.7% of New Zealanders aged 15 and above

HABITAT

Habitat is a custom publication by Resene, a paint manufacturer for house, commercial, industrial and marine painting. The magazine contains home renovation and decoration inspiration, expert DIY's and tips, and the intelligent incorporation of products through design and story integration. Habitat has a low editorial to advertising ratio of 80:20 and is one of the country's largest circulating titles, demonstrating the success of their approach.

Readership: 283,000
6.8% of the New Zealander's aged 15 and above

Sources: *ARE Media Kit, 2021.*
Nielsen National Readership Survey, 2022.
ICG Media, 2020.

FEATURING PRODUCTS IN MAGALOGUES IS AN EFFECTIVE WAY TO DRIVE SALES. ONE EXAMPLE IS BUNNINGS MAGAZINE REALISING A

30% SALES UPLIFT

OF FEATURED PRODUCTS.

Source: *Medium Rare Content Agency, 2022*

KIWIS SPEND AN AVERAGE OF

62 MINUTES

READING A MAGAZINE, UP 11% FROM 2020-2021. AS CONSUMERS INCREASE THEIR READING TIME, MAGAZINES ARE AN EFFECTIVE WAY TO ENGAGE AND CAPITALISE ON BRAND EQUITY.

Source: *Magazine Publishers Association 2021*

NZ MAGAZINE READERS ARE

19% MORE LIKELY

TO BE THE MAIN HOUSEHOLD SHOPPER AND HAVE A STRONG INFLUENCE ON PURCHASING. ALLOWING BUSINESSES TO TAP INTO AN INVALUABLE MARKET OF AFFLUENT, EDUCATED CONSUMERS.

EATING OUT +16% more
WINE +25% more
FASHION +17% more
HOME RENO +31% more
NEW CARS +31% more
INT. FLIGHTS +20% more
GROOMING +21% more
HOLIDAYS +29% more

Source: *Magazine Collective, '10 Reasons To Choose Magazines', 2022*

RESEARCH

A RETURN TO IN-STORE SPENDING

Online spending in New Zealand has fallen for two consecutive quarters, with in-store spending returning.

These results are nuanced, due to the impact that the 2020 lockdown had on increasing online sales and the current inflationary pressures due to the rising cost-of-living. Despite this, in-store spending is shifting too, with in-store spending 14% higher than pre-pandemic. Kiwi's spent almost $12.4 billion on in-store spending in the third quarter of 2022, which is a 19% increase from the year prior.

The sectors most impacted by decreased online spending have been Specialty Food, Groceries, and Liquor Spending. Meanwhile, Essential Grocery Stores and Supermarkets saw increased growth and spending.

ONLINE SPENDING SAW A

14% DECREASE

IN Q3 OF 2022.

IN Q3 OF 2022 KIWIS INCREASED THEIR INSTORE SPEND BY

19%

FROM Q3 IN 2019

This aligns with suggestions from the Kiwi Bank Household Spending Report that New Zealanders are turning from luxurious spending and seeking value-adding experiences after years of restrictions.

Customers are often drawn into store not just for purchases but to enjoy a brand experience, and bringing interactive and memorable components to the in-store experience.

Post-pandemic, there has been a rise in local and hyperlocal shopping. To align with these values, many brands have been activating promotions and activities that give back to local businesses and communities, according to the Shop!ANZ Retail Marketing Report. Using in-store charity minded POS promotions is a way to involve your customers, build customer loyalty, and attract new customers driven by similar values.

Localised instore campaigns and local area marketing is a way to maximise traffic and sales. Marketers and retailers who utilise multi-channels and create seamless shopping experiences across physical and digital, will likely benefit the most from increases in-store.

The findings indicate a shift to pre-pandemic behaviours, and a possible preferential shift to in-person interaction and consumption moving forward.

***Inner** Kiwi 'Consumer Spending Is Holding Up, For Now'*
Shop!ANZ Retail Marketing Report, 2021

OFFLINE AND ONLINE – ITS NOT ONE OR THE OTHER

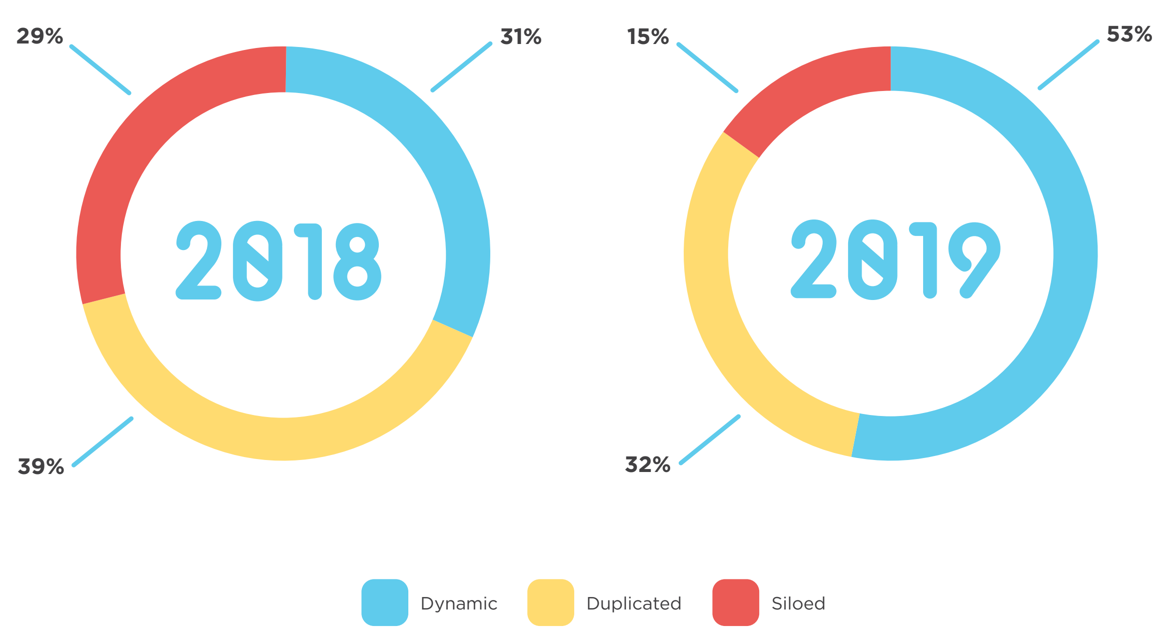
Salesforce, the largest marketing automation platform company in the world in their latest *Salesforce State of Marketing Report*, have found the strong value for offline channels. Salesforce, whilst digitally led, reports an insightful understanding and advisory for brands and marketers – do not ignore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

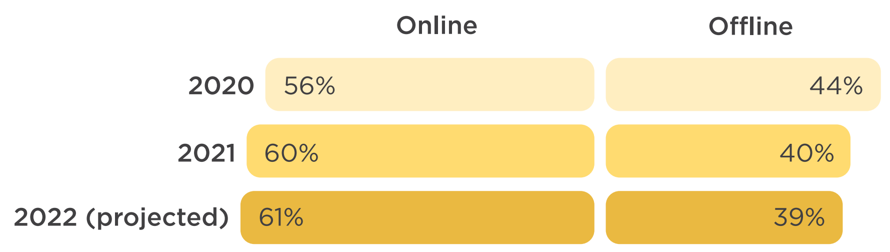


Consumer's have raised the bar on marketing and brands, they now demand more engagement and experiences than ever before and they are fluid across their channels. When online can be noisy and lacking emotional connectivity and recall, offline can build trust triggers and a 'physical human' element. Understanding 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.

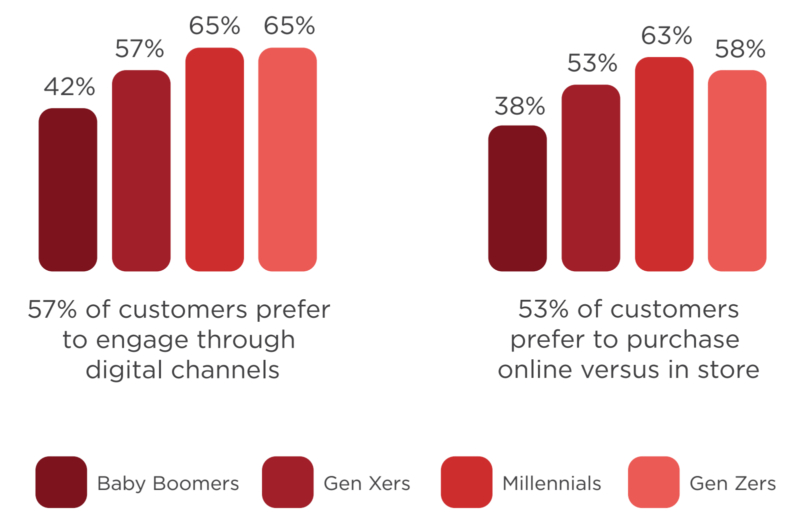
Online has a strong capability to distract and interrupt prospective customer groups, with offline holding a loyal engagement experience that is memorable.

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

BICYCLE SUPERSTORE

Bicycle Superstore, a privately owned retailer selling a range of bikes, helmets, accessories and apparel, launched their Easter Sale campaign to increase sales in bricks and mortar stores as well as their e-commerce store. Utilising available data from an online catalogue and deals aggregator, they were better able to employ valuable information for their audience of sporty families to promote engagement and reader interest.

In the week of catalogue distribution there was a 10.2% increase in total sales compared to the same period in the year prior. Further, there was a 10.7% rise in gross profit percentage; especially notable as this is typically expected to drop during a sales period.

10% INCREASE IN TOTAL SALES

BABY VILLAGE

Buying for Baby

Baby Village set out to reach the specific audience of 28 - 40 year old new parents with mid-high disposable income, who seek trusted businesses and personalised service.

Baby Village created a printed catalogue and saw a total sales growth of over 30% for brands and products included.

This also led to a 48% increase in the number of customers overall, promoting the sales of an extended range of products not in the catalogue, as well as increasing customer loyalty and trust for Baby Village.

48% INCREASE IN CUSTOMER GROWTH

TASMAN LIQUOR

The Bottle O C12 Flyer

The Bottle-O distributed their flyers to the letterboxes of people in the local areas of stores in New Zealand through a multi-channel campaign. With the objective to enforce to customers that Bottle-O should be their focus for their seasonal Christmas purchases, Bottle-O were significantly successful.

Displaying the potent value in the marketing value of catalogues, Bottle-O witnessed an over 9% increase the sales of advertised products. Particularly, there was a greater than 14% increase in sales under the spirits category.

14% INCREASE FOR THE SPIRITS CATEGORY

REPCO

Oil Bonanza Campaign

Repco launched two trans-Tasman retail catalogues dominated by oil, which was sent to the letterboxes of 1.27 million households across New Zealand.

The results of their multi-channel campaign realised a 9.1% increase in the sales of participating supplier's products compared to the same period the previous year.

There was also an increase in VIP Club sign ups by almost 60,000 members across Australia and New Zealand, which included record weekly acquisitions and sustained database growth post promotion.

60K NEW LOYALITY CLUB SIGN UPS ACROSS NEW ZEALAND & AUSTRALIA

COUNTDOWN

Affordable Health Campaign

Countdown ran an Affordable Health Campaign, making use of the growing trend amongst consumers to be more health-conscious and value more nutritious food alternatives. Aiming to promote good health to consumers and highlight how they are combatting the higher prices associated with healthier products, Countdown utilised the marketing reach of catalogues.

2.12% SALES GROWTH COMPARED TO PREVIOUS YEAR

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.

PRINT MARKETING

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 Diirector 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.

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

KNOW LEDGE

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.

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.

DIRECT MAIL

KNOW LEDGE

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 nest 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.

Sources: *BrandScience, 2021.*
Accenture, 2021.

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%).

MAGAZINES

SANDWICH

Sir Kensingston'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 foor 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.

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.

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 Tines 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.

Sources: *Roy Morgan, 2022.*
ThinkNewsBrands, 2022.

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 people[12].

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 lunchtime[13].

4. Multi Media Campaign Effectivness

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.

MEDIA IMPACT

Energy consumption has increased at a rapid rate since the industrial revolution. With this we leave behind a carbon footprint, reported as CO_2.

CO_2e, however, is the contemporary scientific code for 'carbon dioxide equivalent', a term used for describing different greenhouse gases in a common unit to help measure our impact on the environment.

The research below shows how much CO_2e is produced across all the media channels as we assess our media impact.

SOCIAL

Spending 145 minutes on TikTok every day for a year produces approximately 140kg of CO_2e, which is equivalent to driving a standard car for more than 563.27km. Posting a photo on Instagram emits 0.15g of CO_2e, and scrolling on your newsfeed for 60 seconds emits 1.5g of CO_2e. The average user spends 28 minutes scrolling daily which amounts to 42g of CO_2e every day, equalling 15.33kg of CO_2e yearly across one social media platform.

DIGITAL SEARCH

If the internet were a country, it would rank 5th for the amount of energy it uses, sitting just below Japan. According to Google, someone who performs 25 searches a day using their services, watches 60 minutes of YouTube, has a Gmail account and accesses some of its other services, produces approximately less than 8g of CO_2e a day, which is equivalent to driving up to your local grocery store.

EMAIL

An email's carbon emission depends on the size of the email itself and what is attached to it. A typical year of incoming mail adds up to approximately 135kg of CO_2e, which is the equivalent to driving 321.8km in a standard car. When considering email emissions and size, spam email roughly produces approximately 0.3g CO_2e, whereas a regular email produces 4g CO_2e, and an email with a photo attached produces 50g CO_2e in comparison.

DEVICES

Different devices used to view media generate carbon emissions at different rates and are also produced differently. Apple's Environmental Reports suggest that a 24-inch Apple iMac desktop during its life cycle will produce 481kg CO_2e. Another find is that 30kg CO_2e is produced in making an Apple Watch Series 4, and that it also takes 233kg CO_2e to produce a 12-inch MacBook, which is equivalent to driving 353.1km in a standard car.

TELEVISION

Consuming one hour of television per day on the 32-inch LCD produces 35kg of CO_2e a year. This is equivalent to driving 53.1km in a standard car. An average New Zealander spends approximately 15.75 hours watching TV per week, which works out to be 63 hours a month, or 2.25 hours a day. This is equivalent to producing 78.75kg of CO_2e and driving 119.5km in a standard car.

RADIO

Since radio's introduction in the 1890s, there have been many improvements to the channel's sustainability practices. However, radio emits a large amount of carbon when producing a segment and whilst listening. A conventional 20W radio turned on for two hours a week by one person will produce approximately 18,000 tonnes of CO_2e a year.

NEW ZEALANDERS WATCH TV

2.25 HOURS A DAY

PRODUCING EMMISIONS EQUIVALENT TO DRIVING

119.5KM

IN A STANDARD CAR.

CATALOGUES

Customers who spend 60 seconds browsing a digital catalogue will emit 12g of CO_2e, in comparison to viewing a printed catalogue for a day emitting 0.5g of CO_2e, which is equivalent to turning your standard car on and off again. The printing and producing of a catalogue using fossil fuels can emit an average of 0.12kg of CO_2e per page, but this reduces if a printer is using renewable energy sources such as solar or wind.

MAGAZINES

One of the most respected magazines in the world, *National Geographic*, took up the question of how much carbon it emits producing the magazine itself. They financed a study completed by the 'International Journal of Life Cycle Assessment' which showed that the average life cycle of a *National Geographic* magazine produces around 0.82kg of CO_2e. The quantity of greenhouse gas emissions per life cycle of each *National Geographic* magazine produces about the same quantity of greenhouse gases as driving a standard car over a 3km distance.

CONCLUSION

The New Zealand and Australian print industries can stand tall in their environmental credentials. According to Dr Phillip Lawrence, they have reduced their carbon footprint by more than 90% since 1990. Digital giant Apple, Google and others are also driving sustainability initiatives.

Research and analysis show that all media have impacted and we should consider all elements across our marketing channels.

Sources: *Ecometrica, 2012*
Global Citizen, 2022
Earth.Org, 2021
Target Internet, 2022
Google News, 2022
How Bad Are Bananas? The Carbon Footprint Of Everything 2010
Apple, 2021
ThinkTV NZ, 2022
The Guardian, 2006
The Real Media Collective, 2020
Tremblant Express, 2019
B&T Magazine (Dr Phillip Lawrence), 2020

CIRCULATING ECONOMIES

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), which leapt to a gigantic 59.4 million metric tonnes (Mt) across the world in 2022.

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 74.7 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 is that the packaging is recyclable (80%) and made of bio-degradable material and (63%) compostable materials (55%).

THE ORIGINAL SUSTAINABILITY CHAMPION

Paper has the advantage of being produced by an industry driving sustainability. Between 2005 and 2015, European forests (where a lot of Australian 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*
E-Waste Monitor, UN, 2022
The Round Up, 2023

59.4M
METRIC TONNES OF ELECTRONIC WASTE ACROSS THE WORLD IN 2022

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

1 IN 5
CONSUMERS PREFER SUSTAINABLE BRANDS

LOVE PAPER

SUSTAINABILITY

CONSUMER PACKAGING PREFERENCES

Paper-based packaging is favoured by New Zealand consumers for being better for the environment, according to the results of a recent survey by Toluna. As consumers become increasingly conscious of their packaging choices, paper and cardboard packaging is considered to be the most recyclable material.

Consumers throughout New Zealand are demonstrating a willingness to change their behaviour to shop more sustainably. 38% are willing to spend more on a product if packaged using sustainable materials, and 47% would consider avoiding a retailer if they knew they were not actively trying to reduce their use of non-recyclable packaging. Plastic-free packaging is important to consumers too, with 58% indicating they would purchase more items from retailers actively removing plastic from packaging.

New Zealanders are willing to bear the consequences of using non-recyclable packaging too, with 59% believing it should be discouraged through taxation.

In New Zealand, paper is sourced from managed regrowth forests, with more than 1.6 million hectares of productive planted forests where the cycle of planting, growing and harvesting is carefully controlled. 70% of the nations planted forests are FSC certified, which is an impressive comparison to the global average, where about 13% of forests are eco-certified through FSC or PEFC.

38%

OF NEW ZEALANDERS SPEND MORE ON SUSTAINABLY PACKAGED PRODUCTS.

58%

OF NEW ZEALANDERS WOULD PURCHASE MORE FROM PLASTIC-FREE RETAILERS.

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

The importance of 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'. Despite this greenwashing behaviour, paper has a strong social and environmental argument. It is renewable, recyclable, carbon-storing, preferred by consumers, and a high employing industry.

58% believe that when a service provider urges them to switch from paper to electronic bills and statements, they are motivated by finances and are trying to save costs rather than protect the environment. This could lead to the argument that brands pushing this line may be hurting their longer-term reputations.

As cybercrime and scams increase, 20% of New Zealander's consider cybercrime to be a current life concern. In 2022, the New Zealand online safety organization NetSafe, received more than 15 thousand complaints of fraud or scams, a 20% increase from the previous year. This led to a combined loss of $35 million to victims. Paper and mail are safer channels for consumers to use, not hosting the same risks plus also providing a sense of legitimacy.

Sources: *Toluna Survey, 2021*
NZ Ministry for Industries and Forestry
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Netsafe Annual Report, 2022.

82%

OF NEW ZEALANDERS BELIEVE THEY SHOULD HAVE THE RIGHT TO CHOOSE HOW THEY RECEIVE COMMUNICATIONS FROM FINANCIAL ORGANISATIONS AND SERVICE PROVIDERS.

ACKNOWLEDGEMENTS

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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 Members. 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.

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