

Marketing Media in Australia

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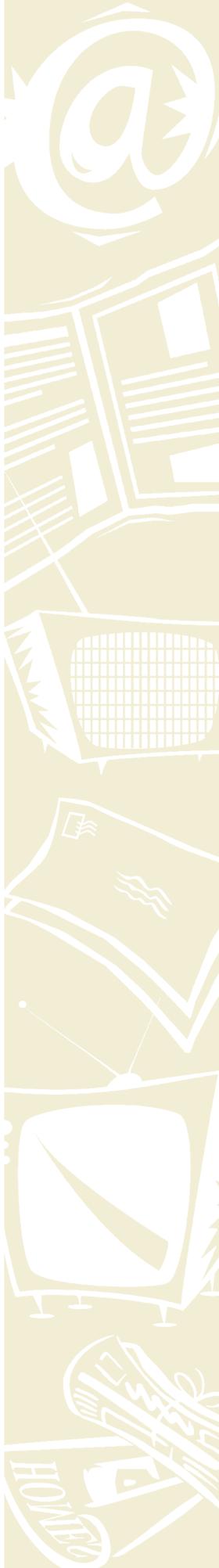


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Marketing Media in Australia



Executive Summary



Marketing Media in Australia



Executive Summary

Introduction

Welcome to Marketing Media in Australia 2001, a ResponseAbility Report, one of the most comprehensive examinations of marketing media ever conducted in Australia. The production of this report was sponsored by Australia Post.

The objective of this research is to examine Consumer and Business People's attitudes towards various marketing media in Australia. The marketing media examined includes marketing communications received via Direct Mail Advertising, TV Advertising, Newspaper and Magazine Advertising, Radio Advertising, Email Advertising and Unaddressed Advertising Mail.

Both qualitative and quantitative investigation was conducted in order to obtain a thorough understanding of how various marketing media are perceived. Specific focus was placed on understanding what attributes Consumers and Business People (both Business Consumers and Marketers) attach to each media, what is viewed as strengths and weaknesses and how receptive they are to marketing messages brought to them by each media.

The executive summary that follows presents the findings firstly in terms of a comparison between each Marketing media followed by an examination of the responses to each media individually, finishing with an overview of findings from the business market.

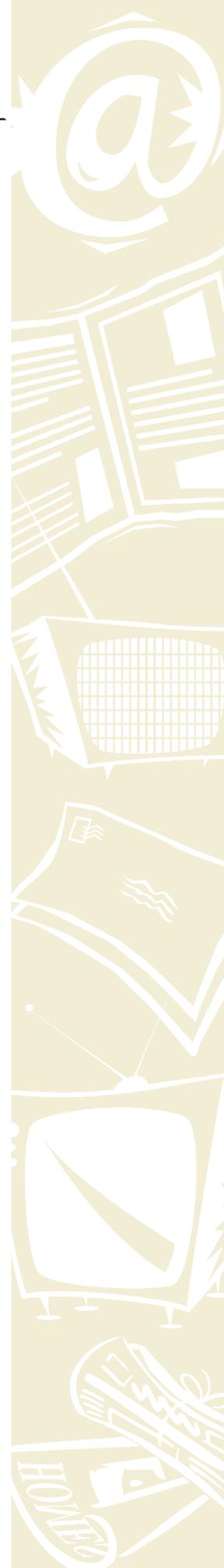
This report is the first in a tracking study that will form an important benchmark for looking at shifts and trends of the relative strengths of marketing media in Australia over time.

Methodology Overview

The research process began with qualitative research in the form of focus groups combined with in-depth interviews. The information gathered during this qualitative process was then used to write the quantitative telephone questionnaires.

In summary, the following was undertaken:

- Five Business focus groups
- Five Consumer focus groups
- 50 face-to-face in-depth interviews with Senders and Receivers of Marketing Media
- 1,100 telephone surveys with Consumers
- 400 telephone surveys with Senders and Receivers of Marketing Media
- 100 telephone surveys with Gatekeepers and Personal Assistants



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Executive Summary

Consumer Attitudes to Marketing Media

A Comparative View of Various Media

- The enjoyment factor
- Influence over purchasing decision
- Preferences for receipt of information

Perceptions of Individual Marketing Media

- Direct Mail
- Unaddressed Advertising Mail
- Email
- TV
- Radio
- Newspaper and Magazines

Business Attitudes to Marketing Media

- Effectiveness
- Preferences and perceptions
- Insights for Direct Mail
- Predictions for the future
- Gatekeepers and Personal Assistants (Filterers)



Marketing Media in Australia

A Comparative View of Various Media

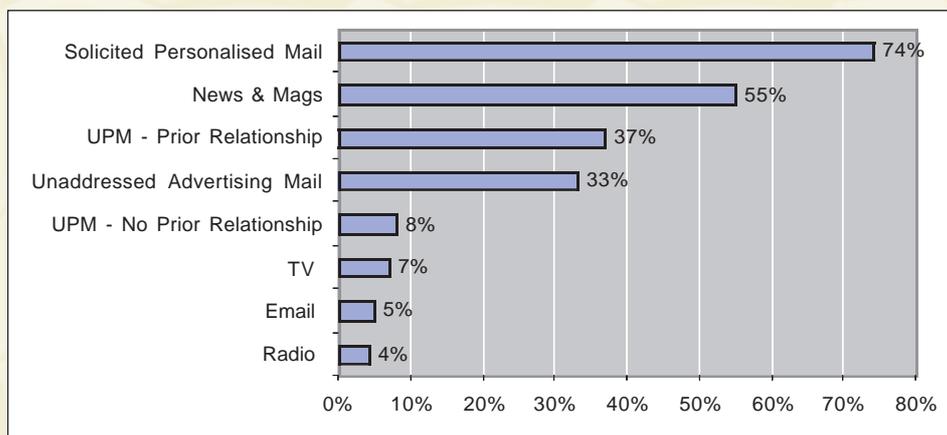
The Enjoyment Factor

Solicited Personalised Mail is the media most enjoyed by Consumers (74%), followed by Newspaper and Magazine Advertising (55%), with Email Advertising and Radio Advertising being the least enjoyed.

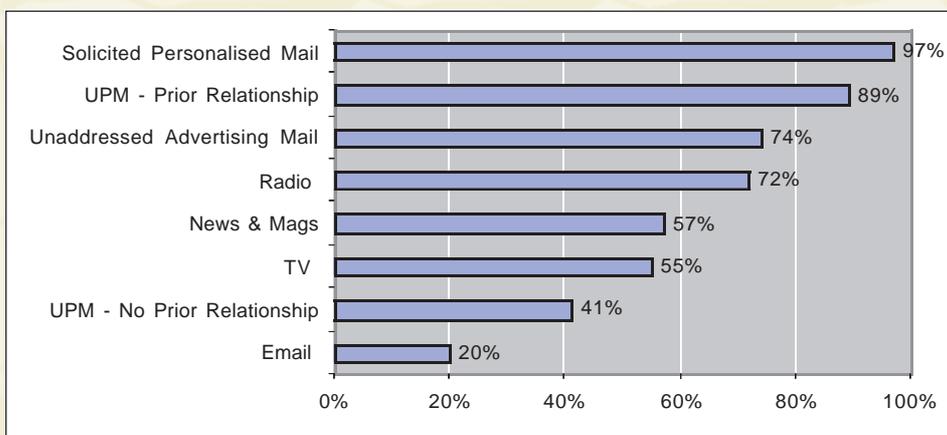
Solicited Personalised Mail is the media Consumers either most enjoy or are indifferent to (97%), followed by Unsolicited Personalised Mail - Prior Relationship (89%).

Executive Summary

Percentage of Consumers Who Enjoy Receiving Various Media



Percentage of Consumers Who Enjoy or are Indifferent to Receiving Media



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

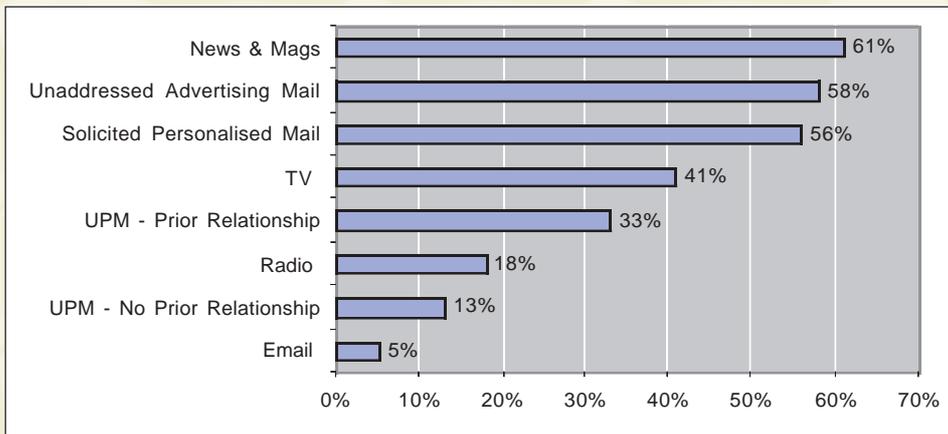
Influence of Various Media over Purchasing Decisions

Newspaper and Magazine Advertising has greatest influence upon Consumers' purchasing decisions (61%), followed by Unaddressed Mail Advertising (58%).

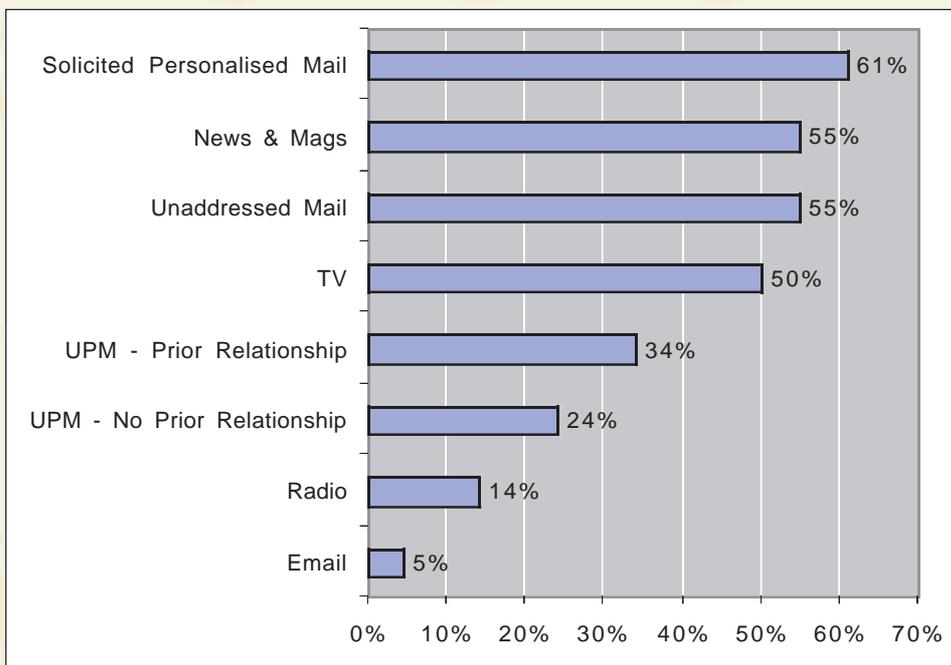
Solicited Personalised Mail is the media that most Consumers purchase from (61%), followed by Newspaper and Magazine Advertising (55%).

Executive Summary

Percentage of Consumers' Purchasing Decisions Influenced by Media



Percentage of Consumers Who Purchase as a Result of Receiving Media



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

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Executive Summary

Consumers Preferences of Receipt of Information

Direct Mail (60%) is clearly the preferred media for Consumers to receive Financial Information.

TV (38%), closely followed by Direct Mail (34%), is the preferred media for receipt of New Product Announcements.

Direct Mail is clearly the preferred media (34%) for receipt of Marketing Promotional Information.

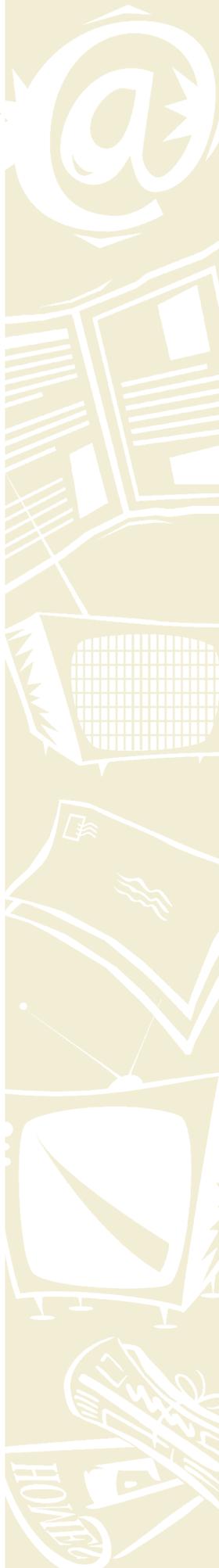
Direct Mail (36%), followed by TV and Newspapers and Magazines, is the preferred media for Consumers to receive General Information at home.

Direct Mail (33%) is the favoured media for receipt of general information at work, however, 38% of Consumers either don't need or don't want general information to be sent to them at work.

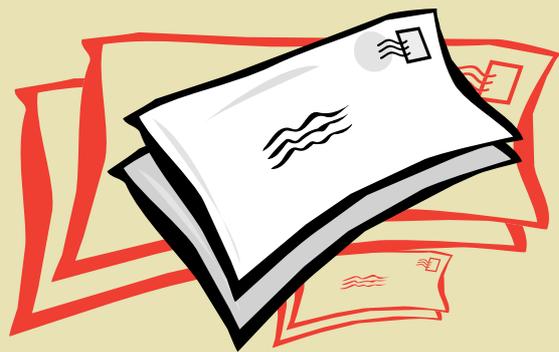
37% of Consumers nominate Newspapers and Magazines as their preferred media for the receipt of Automotive Information.

73% of Consumers prefer to receive Loyalty Program Information via Direct Mail.

29% of Consumers prefer to receive Travel/Holiday Information via Newspapers and Magazines, closely followed by other media forms.



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Executive Summary

Consumer Perceptions of Individual Marketing Media

Direct Mail

Solicited and Unsolicited (with a prior relationship) Direct Mail, rated very well in terms of Consumer enjoyment or indifference to receiving various marketing media with Solicited Direct Mail being the most enjoyed media of the eight media examined. The main reasons Consumers enjoy Solicited Direct Mail are information and relevance, the fact that it is the result of a request and that it aids the purchasing process at the Consumer's convenience.

Unsolicited Direct Mail (with no prior relationship) was less popular when compared to solicited and unsolicited (with a prior relationship) due to concerns regarding privacy, environmental impact and the relevancy of some received communications.

One of the strong trends to emerge from the research is the importance Consumers place on the difference between Unsolicited Direct Mail received from organisations with whom they have had a prior relationship and those that they have not.

37% of Consumers actually enjoy receiving unsolicited Direct Mail from organisations they have had a prior relationship with, as opposed to 8% who enjoy receiving unsolicited Direct Mail from those that they have no prior relationship with.

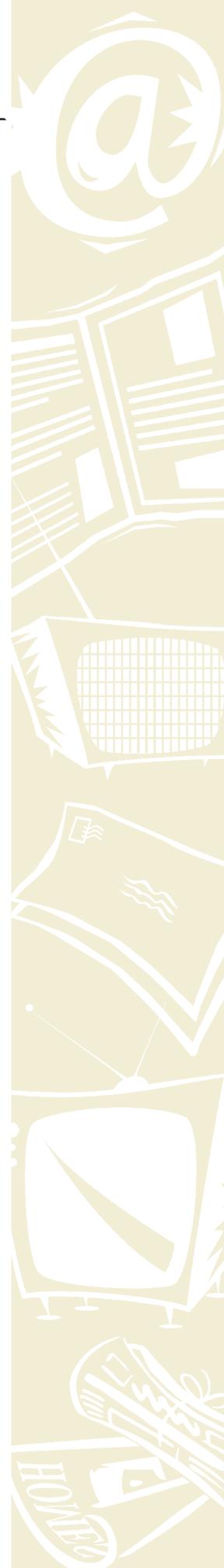
This outcome indicates that marketers should strive to maximise positive brand awareness and experience, employ strongly targeted customer acquisition techniques and should not disregard re-activating lapsed customers when looking to attract new business.

Consumers also nominated Solicited Direct Mail as the media that they most purchase from, which is not surprising given that Consumers have requested the information in the first place. This outcome indicates the importance of Solicited Direct Mail in the purchasing process.

Direct Mail is clearly the preferred method for receipt of loyalty program information with 73% of Consumers opting for mail over all other media. Similarly, Direct Mail was the preferred media for receipt of the following information:

- Financial Information at 60%
- General Information at home 36%
- Marketing Promotional Information 34%
- General Information at work 33%

Direct Mail was also second choice (34%) in regard to receiving New Product Announcements behind TV Advertising (38%).



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Unaddressed Advertising Mail

One of the more interesting findings to come out of the research is Consumer attitude to Unaddressed Advertising Mail, a medium traditionally spurned by many as 'junk'. But the fact is that 63% of Consumers open and read Unaddressed Advertising Mail and 74% of Consumers either enjoy or are indifferent to receiving it. The main reasons given are that the media provides useful local information and specials, cuts down on shopping time by allowing comparative analysis and is considered less intrusive than other media. Given these reasons, it's not surprising that 58% of Consumers say receiving Unaddressed Advertising Mail influences their buying decision and 55% say they purchase as a result of receiving it.

The concerns that some Consumers have about Unaddressed Advertising Mail tend to be environmental in nature, such as paper wastage and mess.



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Executive Summary

Email Advertising

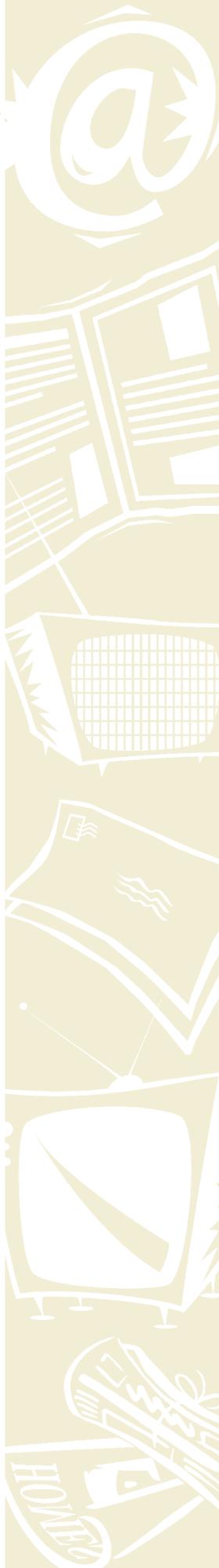
Although Email Advertising is in its relative infancy in Australia, 43% of Consumers surveyed have been subjected to it. Of this group, 54% do not enjoy receiving it, 42% are indifferent and 5% enjoy Email Advertising.

Of the Consumers who had been subjected to Email Advertising, 84% could nominate an element they don't like, such as concerns about viruses, volume and privacy invasion. E-marketers need to be aware of both Consumer and Business People concerns regarding privacy and unsolicited email. They need to be sensitive to the size and quantity of emails they send and they need to address Receivers' concerns regarding potential viruses.

31% of Consumers subjected to Email Advertising could nominate an element of it that they like, such as the perception that it is quick and easy to receive, informative and forms a permanent record.

Email did not perform particularly well with respect to influencing Consumers' purchasing decisions with only 11% of the 43% sample (5% of overall sample) stating that it influences the buying decision.

As can be seen from the research, email penetration is still relatively low in Australia, with only 43% of Consumers having access to email. 23% of Consumers surveyed have email access at home only, 15% both home and work and 5% have access at work only. As would be expected the 18-24 age bracket has by far the greatest access and the 55+ groups have the least.



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Executive Summary

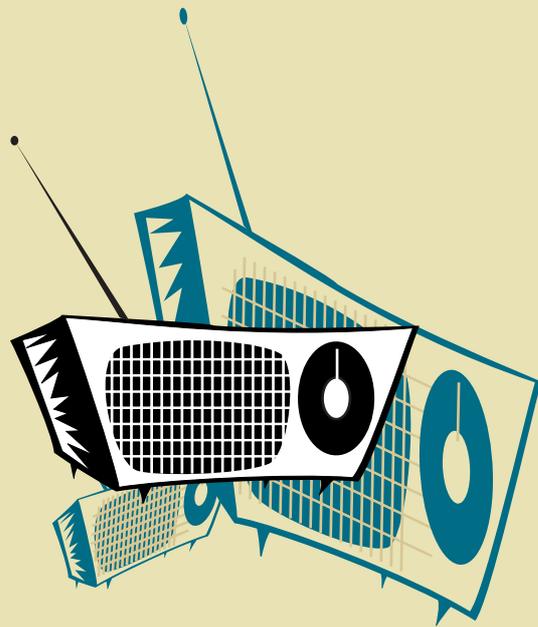
TV Advertising

Most Consumers are either indifferent to TV Advertising (48%) or don't enjoy it (45%), with only 7% saying that they enjoy TV Advertising. 95% of Consumers could nominate an element that they don't like about TV Advertising, such as frequency, volume (they are perceived as louder than the programs being viewed), the length of breaks, and that TV Advertising can be interruptive, intrusive and repetitious. Reasons provided when Consumers could nominate an element that they like about TV Advertising (57%) are that the ads can be funny, informative, clever, catchy jingles and that they provide a break from the programming.

Most Consumers researched said that TV Advertising does not influence their buying decision (58%), while 41% said that it does. Half the Consumers surveyed say that they purchase as a result of viewing TV Advertising.



Marketing Media in Australia



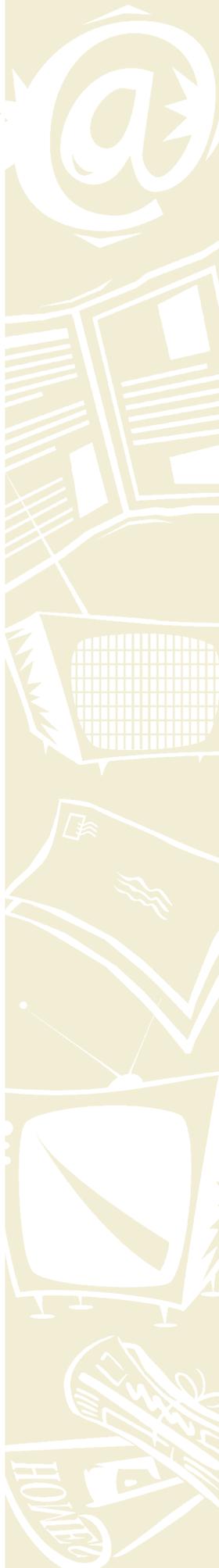
Executive Summary

Radio Advertising

The majority of Consumers are indifferent to Radio Advertising (67%) and 29% don't enjoy it. Only 4% say they actually enjoy Radio Advertising.

50% of Consumers could nominate an element of Radio Advertising they like, such as the fact that it is less intrusive than TV Advertising, it is informative and humorous and that they can tune out if they wish.

81% of Consumers believe that Radio Advertising does not influence their purchasing decision, 1% are unsure and 18% say that Radio Advertising does influence their purchasing decision, which reflects the 14% who say that they purchase as a result of Radio Advertising.



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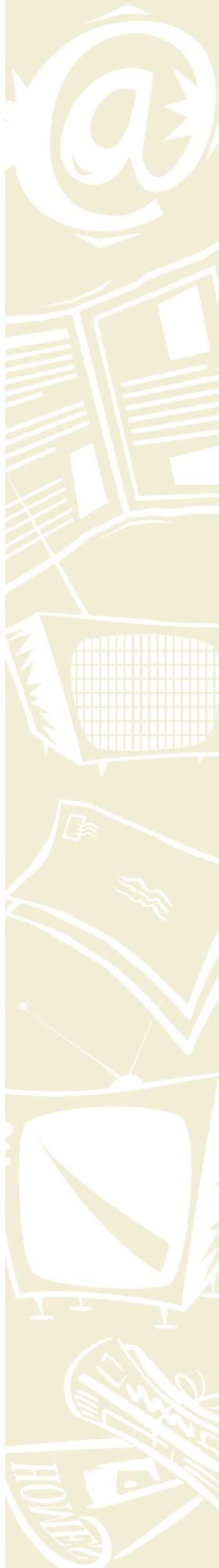
Executive Summary

Newspaper and Magazine Advertising

The majority of Consumers (57%) either enjoy or are indifferent to Newspaper and Magazine Advertising with 43% not enjoying it. 81% of Consumers can nominate an element of Newspaper and Magazine Advertising that they like. Key attributes cited were the fact that it is seen to provide useful information, it can be either read or ignored and it can be viewed at a time of the Consumer's choosing. It is the preferred way to receive automotive information and Travel/Holiday information.

48% of Consumers can nominate an element they don't like in Newspaper and Magazine Advertising, with the primary reason cited being that advertising takes up too much space, particularly in magazines.

55% of Consumers say they purchase as a result of Newspaper and Magazine Advertising.



Marketing Media in Australia



Executive Summary

Business Attitudes to Marketing Media

Effectiveness

Most Effective Media

Those researched in business who both receive and send media communications nominate TV Advertising ahead of Public Relations (PR) as the most effective media overall.

They also nominate TV Advertising as the most effective media for response and conversion to sales. However, when it comes to relationship building, there is a split decision, with Receivers nominating PR ahead of Direct Mail and Senders nominating the opposite with Direct Mail ahead of PR as the most effective relationship builder.

Following the initial trend however, Business Receivers and Senders nominate TV Advertising as the most effective Brand Builder, with Senders putting it just ahead of PR. When it comes to influencing behaviour, there is agreement again, with TV Advertising being nominated by both Senders and Receivers. And when it comes to attracting traffic to a web site, Business Receivers nominate TV Advertising as the most effective media.

Preferences and Perceptions

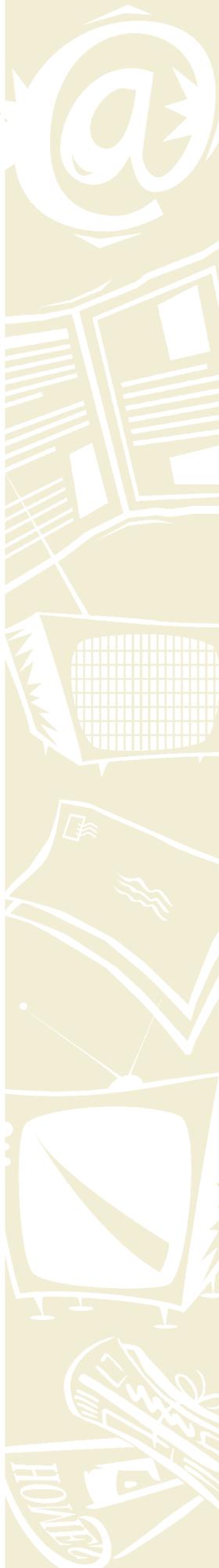
The Receipt of Information in the Workplace

Both Business Senders and Receivers are in agreement that the preferred way to receive information in the workplace is via Direct Mail. In fact, with a 52% positive response, it seems that Business Receivers either enjoy or are indifferent to receiving Direct Mail at work while interestingly a comparative 40% of Business Senders feel the same way.

From these respondents also comes the perception that the major strengths of Direct Mail are that it is a targeted, personal, 'in-your-face' media with good reach. And when it comes to the question of cost effectiveness, 39% of those on the receiving end of communications in business believe that Direct Mail is a cost-effective media while 42% of Business Senders share the same belief.

A question of interest in today's changing market is whether Business People prefer to receive Direct Mail or Email Advertising. The results are that 58% of Business Receivers prefer to receive Direct Mail compared to Email Advertising, while an even greater percentage of Business Senders (61%) agree.

Another point of interest is traditional catalogue versus catalogue delivery via the internet. It is of interest to note that 74% of Business Receivers prefer to receive a catalogue via Direct Mail compared to the internet with a very similar 75% of Business Senders expressing the same preference.



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Executive Summary

Insights for Direct Mail

How to Increase the Chance of B2B Direct Mail Being Opened

Business People say that the best way to increase the chances of them opening Direct Mail is for advertisers to make it clear on the envelope what's inside and to personalise the letter. They state that special offers and having their prior permission is the best way to increase the chance of response.

It is interesting to note that Business Receivers say that they open and read 90% of the DM they receive, while Business Senders open and read 84%. Most state the reason for not opening certain mail is their belief that they can tell without opening what's inside and its apparent irrelevance for them.

When it comes to response, 73% of Business Receivers say they respond to Direct Mail, while 78% of Senders claim the same thing.

The key motivator when it comes to response amongst Business People is having a need for the product or service being promoted.

Direct Mail Predictions for the Future

Predictions as to the General Future of B2B Direct Mail

The research undertaken predicts a stable immediate future for the B2B Direct Mail business, with 69% of Business Senders expressing the belief that the use of B2B DM will increase or stay the same in the future.

67% of Business Senders believe their own use of Direct Mail will increase or stay the same in the next 12 months.

Gatekeepers and Personal Assistants (Filterers)

Research also included the opinions of those people responsible for filtering other people's mail. Their responses mirrored much of what we learned from Business Receivers and Senders, with 77% of Filterers preferring to receive a catalogue via Direct Mail compared to Email. It is interesting to note that these influencers open and read 92% of the Direct Mail they receive, while only 33% of them pass on 100% of the Direct Mail they receive to their bosses.

Like their fellow business colleagues, Filterers nominate TV Advertising and Radio Advertising as the most effective media overall.



Marketing Media in Australia



Glossary of Terms

Solicited Personalised Mail (SPM)

Personally addressed mail received as a consequence of requesting it.

Unsolicited Personalised Mail - Prior Relationship (UPM-PR)

Personally addressed mail received from an organisation that has had prior contact with the Consumer and the information has not been requested.

Unsolicited Personalised Mail - No Prior Relationship (UPM-NPR)

Personally addressed mail received from an organisation that has had no prior contact with the Consumer nor has the information been requested.

Direct Mail (DM)

A combination of Solicited Personalised Mail, Unsolicited Personalised Mail - Prior Relationship and Unsolicited Personalised Mail - No Prior Relationship.

B2B Direct Mail

Business-to-Business Direct Mail Advertising

Unaddressed Advertising Mail (UAM)

Unaddressed unsolicited advertising mail received by Consumers from organisations that they may or may not know.

Email Advertising

Email of an advertising nature received by both Consumers and Business People at home and/or at work.

Business Receivers

Receivers of Marketing Media at work and/or at home.

Business Senders

Owners, senior decision-makers and marketing decision-makers of small, medium and large organisations.

Gatekeepers and Personal Assistants

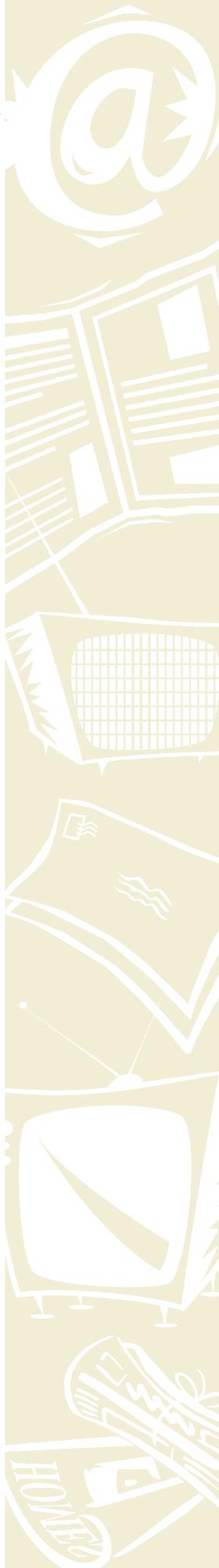
Those whose job it is to filter Marketing Media on behalf of their boss or fellow workers.



Marketing Media in Australia



General Questions



Marketing Media in Australia



General Questions

Consumers

- Percentage of Consumers Who Enjoy Receiving Various Media 37
- Percentage of Consumers Who Enjoy or are Indifferent to Various Media 37
- Percentage of Consumers' Purchasing Decisions Influenced by Media 39
- Percentage of Consumers Who Purchase as a Result of Receiving Media 39
- How Consumers Prefer to Receive Financial Information 41
- How Consumers Prefer to Receive New Product Announcements 41
- How Consumers Prefer to Receive Marketing Promotional Information 43
- How Consumers Prefer to Receive General Information at Home 43
- How Consumers Prefer to Receive General Information at Work 45
- How Consumers Prefer to Receive Automotive Information 45
- How Consumers Prefer to Receive Travel/Holiday Information 47
- How Consumers Prefer to Receive Loyalty Program Information 47
- What Prompts Consumers to Respond to Direct Mail 49
- What Percentage of Direct Mail is Opened and Read 51
- Do Consumers Pass On Information of Interest to Them to Others 53
- What Percentage of Consumers are Aware of SMS Advertising Messaging 55
- Do Consumers Enjoy SMS Advertising Messaging 57

Business People

- Most Effective Media Overall 61
- Most Effective Media for Response and Conversion Rates 63
- Most Effective Media for Relationship Building 65
- Most Effective Media for Brand Building 67
- Most Effective Media for Influencing Behaviour 69
- Most Effective Media to Attract People to a Web Site 71



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Direct Mail Advertising - An Overview

Consumers

60% of Consumers prefer to receive Financial Information via Direct Mail (DM)
 34% of Consumers prefer to receive New Product Information via DM
 34% of Consumers prefer to receive Marketing Promotional Information via DM
 36% of Consumers prefer to receive General Information at home via DM
 33% of Consumers prefer to receive General Information at work via DM
 73% of Consumers prefer to receive Loyalty Program Information via DM
 58% of Consumers say that the offer is the element that prompts their DM response
 75% of DM received by Consumers is opened and read
 81% of Consumers say they pass on Advertising Information of interest to them to others
 97% of Consumers either enjoy or are indifferent to receiving Solicited Personalised Mail (SPM)
 98% of Consumers can nominate an element of SPM that they like
 3% of Consumers can nominate an element of SPM that they don't like
 56% of Consumers say that receiving SPM influences their buying decision
 61% of Consumers say that they purchase as a result of receiving SPM
 89% of Consumers either enjoy or are indifferent to receiving UPM - PR
 87% of Consumers can nominate an element of UPM - PR that they like
 65% of Consumers can nominate an element of receiving UPM - PR that they don't like
 33% of Consumers say that receiving UPM - PR influences their buying decision
 34% of Consumers say that they purchase as a result of receiving UPM - PR
 41% of Consumers enjoy or are indifferent to receiving UPM - NPR
 34% of Consumers can nominate an element of UPM - NPR that they like
 78% of Consumers can nominate an element of UPM - NPR that they don't like
 13% of Consumers say that receiving UPM - NPR influences their buying decision
 24% of Consumers say that they purchase as a result of receiving UPM - NPR

Business Receivers

DM (20%) is the preferred way for Business Receivers to receive information
 52% of Business Receivers either enjoy or are indifferent to receiving DM
 39% of Business Receivers believe that DM is a cost-effective media
 58% of Business Receivers prefer to receive DM compared to Advertising Email
 74% of Business Receivers prefer to receive Catalogues via DM compared to Email
 Business Receivers say that they open and read 90% of DM received
 73% of Business Receivers say they respond as a consequence of receiving DM
 68% of Business Receivers believe that the use of B2B DM will increase or stay static
 67% of Business Receivers say that their usage of DM will increase or stay static

Business Senders

DM (21%) is the preferred way for Business Senders to receive information
 40% of Business Senders either enjoy or are indifferent to receiving DM
 42% of Business Senders believe that DM is a cost-effective media
 61% of Business Senders prefer to receive DM compared to Advertising Email
 75% of Business Senders prefer to receive Catalogues via DM compared to Email
 Business Senders say that they open and read 84% of DM received
 78% of Business Senders say they respond as a consequence of receiving DM
 69% of Business Senders believe that the use of B2B DM will increase or stay static
 67% of Business Senders say that their usage of DM will increase or stay static

Gatekeepers and Personal Assistants (Filterers)

77% of Filterers prefer to receive Catalogues via DM compared to Email
 33% of Filterers say they pass on 100% of the DM received to their boss
 Filterers say that they open and read 92% of the DM that they receive

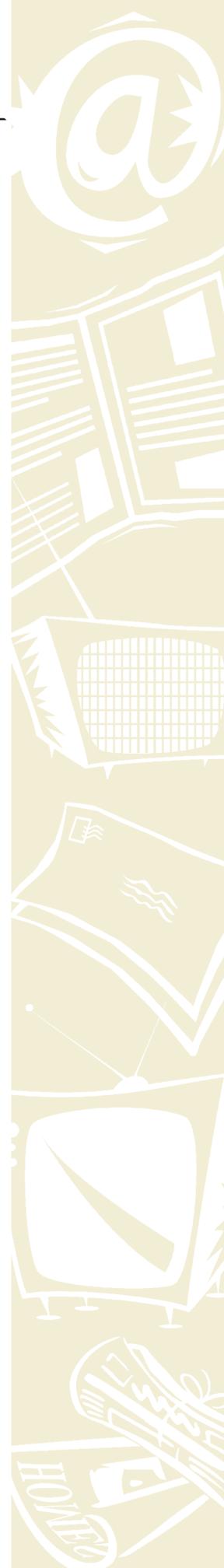
Glossary

DM = Direct Mail.

SPM = Solicited Personalised Mail.

UPM - PR = Unsolicited Personalised Mail - Prior Relationship.

UPM - NPR = Unsolicited Personalised Mail - No Prior Relationship.



Marketing Media in Australia

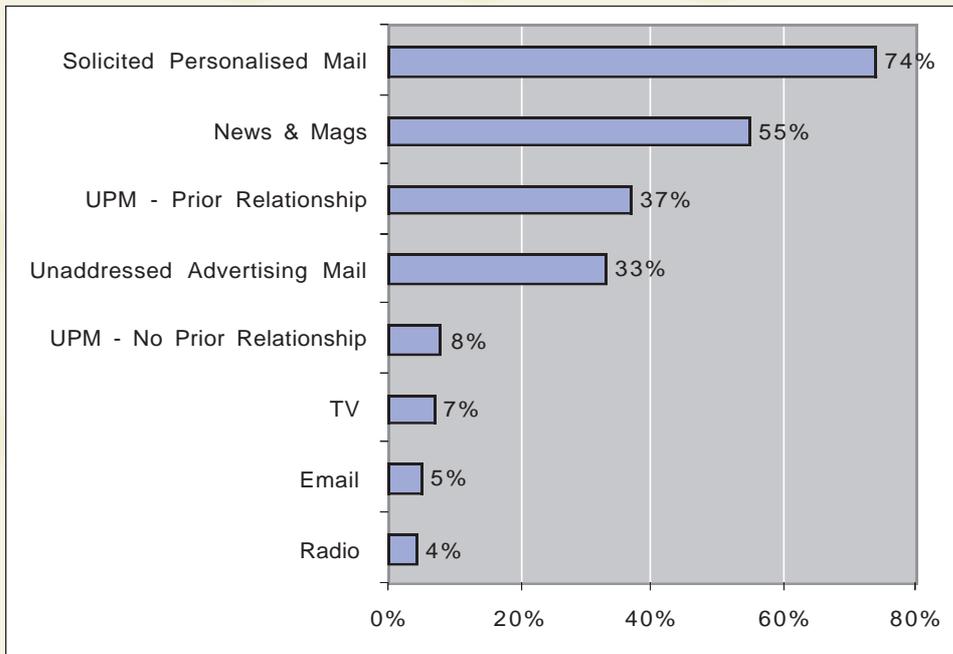
What Percentage of Consumers Who Enjoy Receiving Various Media and Percentage of Consumers Who Enjoy or are Indifferent to Receiving Various Media

Solicited Personalised Mail is the media most enjoyed by Consumers (74%), followed by Newspaper and Magazine Advertising (55%).

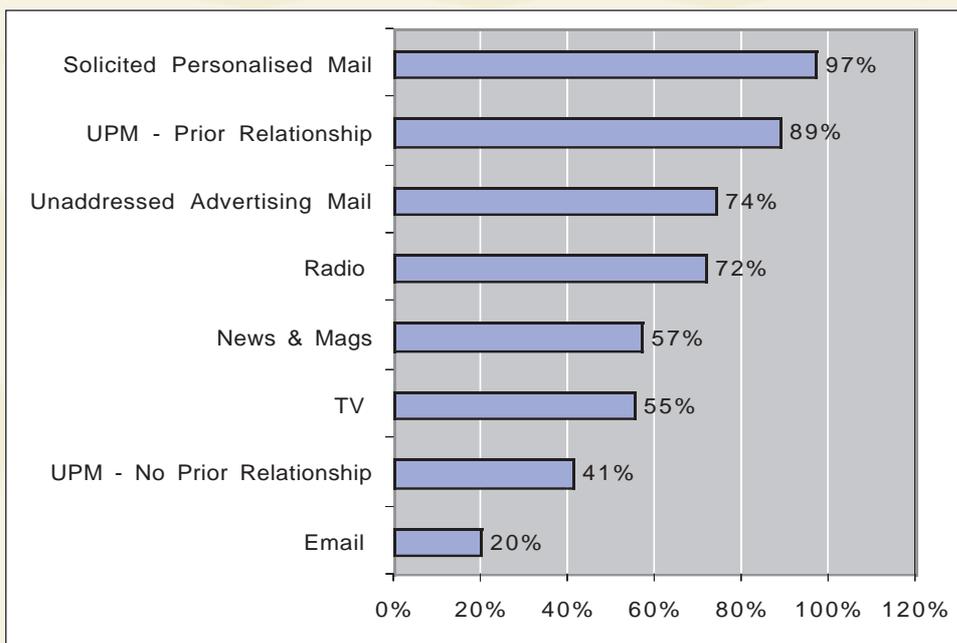
Solicited Personalised Mail is the media Consumers either most enjoy or are indifferent to (97%), followed by Unsolicited Personalised Mail - Prior Relationship (89%).

Consumers

Percentage of Consumers Who Enjoy Receiving Various Media



Percentage of Consumers Who Enjoy or are Indifferent to Receiving Media



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

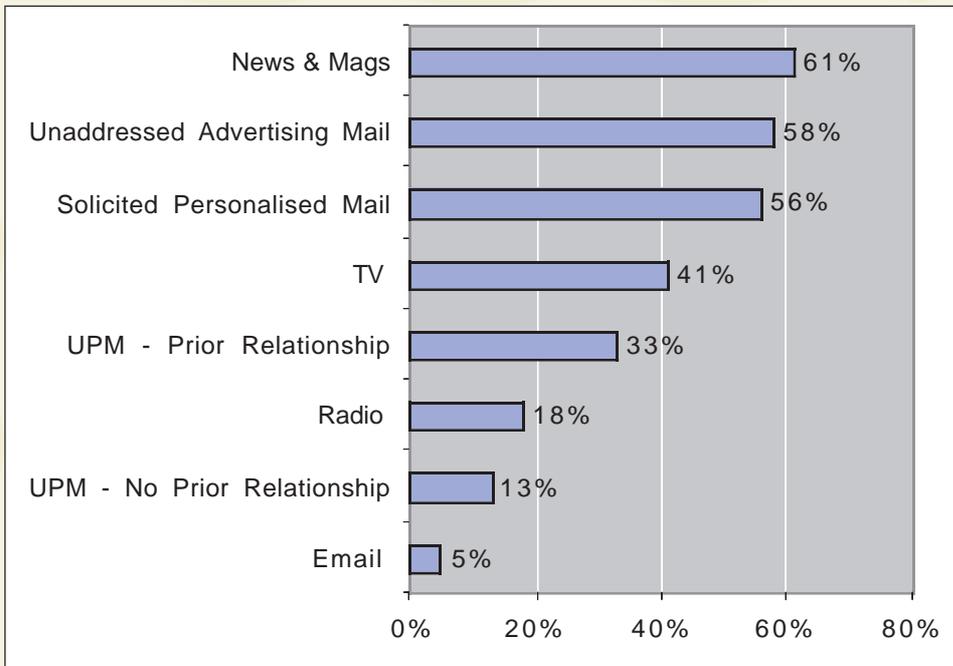
What Percentage of Consumers' Purchasing Decisions are Influenced By Various Media and What Percentage of Consumers Purchase as a Result of Receiving Various Media

Newspaper & Magazine Advertising most influence Consumers' purchasing decisions (61%), followed by Unaddressed Mail Advertising (58%).

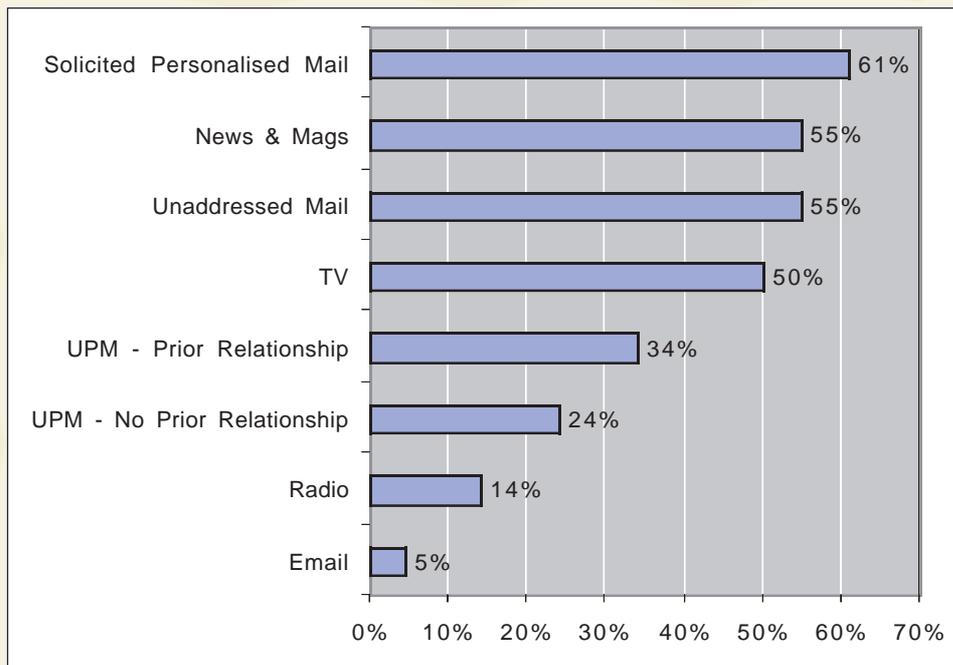
Solicited Personalised Mail is the media that Consumers most purchase from (61%), followed by Newspaper and Magazine Advertising (55%).

Direct Mail

Percentage of Consumers' Purchasing Decisions Influenced by Media



Percentage of Consumers Who Purchase From Various Media



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

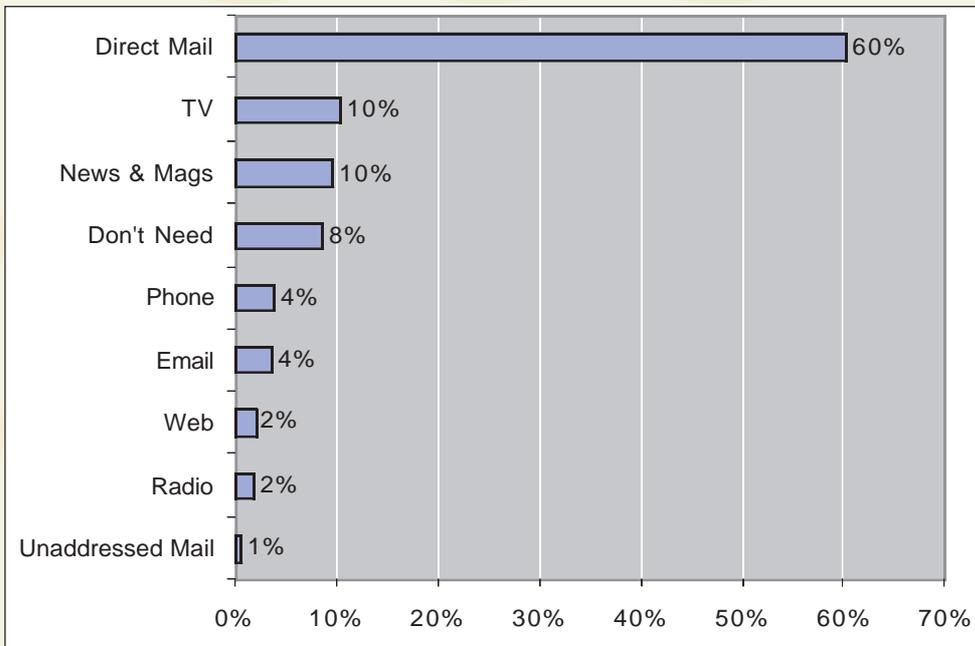
How Consumers Prefer to Receive Financial Information and New Product Announcements

Direct Mail is clearly the preferred media for Consumers to receive Financial Information (60%).

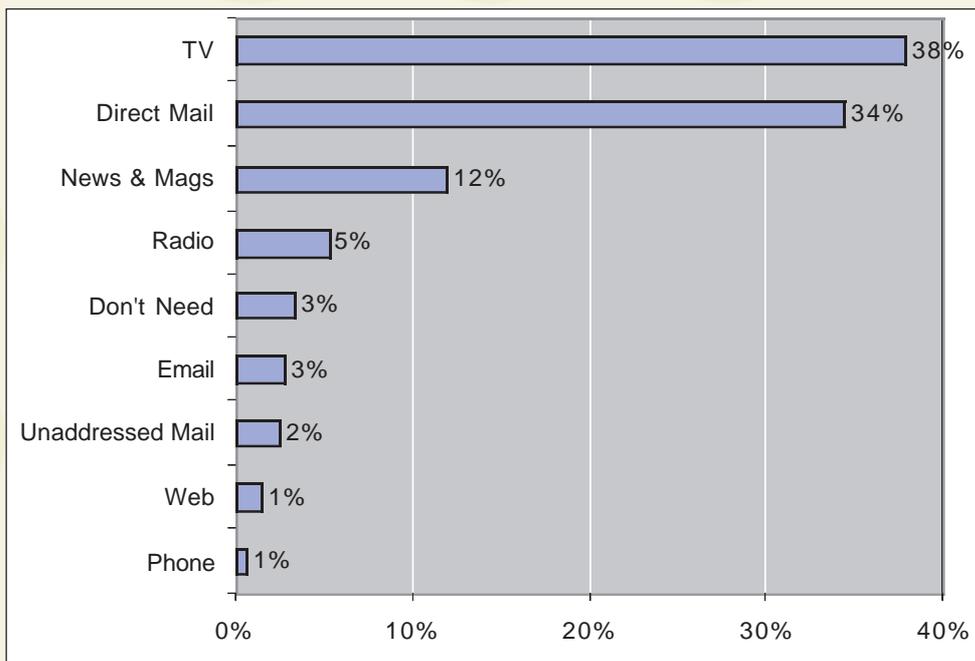
TV Advertising (38%), closely followed by Direct Mail (34%), are the preferred media for Consumers to receive New Product Announcements.

Direct Mail

How Consumers Prefer to Receive Financial Information



How Consumers Prefer to Receive New Product Announcements



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

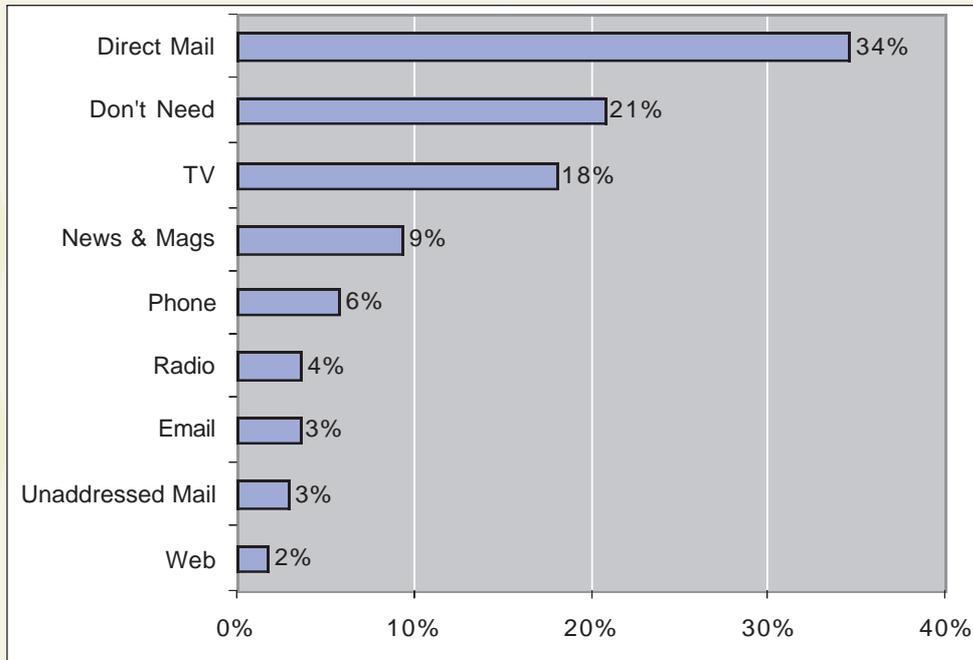
How Consumers Prefer to Receive Marketing Promotional Information and General Information at Home

Direct Mail is clearly the preferred media (34%) for Consumers to receive Marketing Promotional Information.

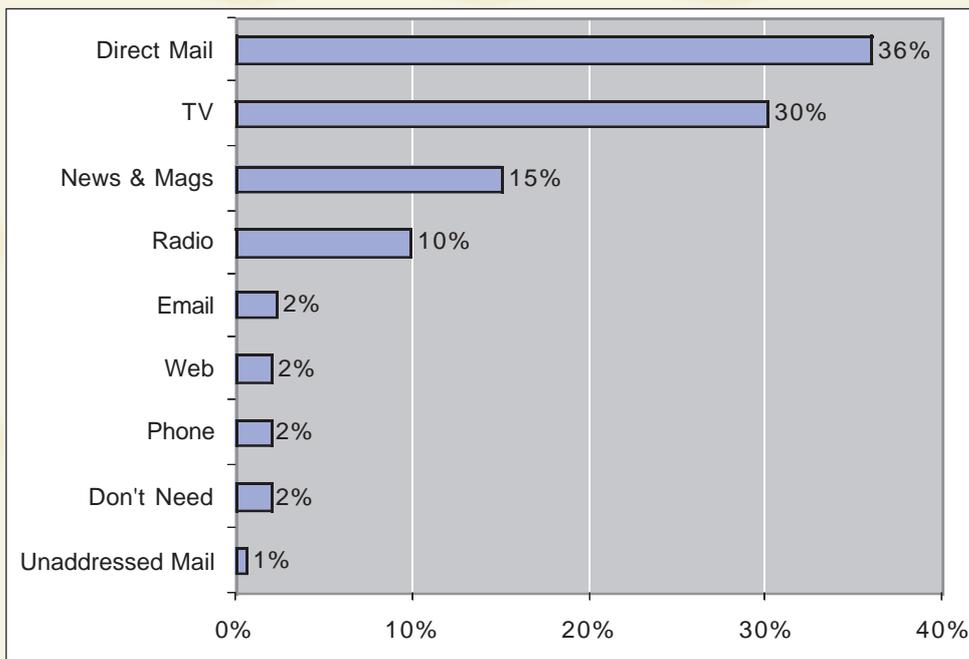
Direct Mail (36%), followed by TV Advertising (30%), are the preferred media for Consumers to receive General Information at Home.

Direct Mail

How Consumers Prefer to Receive Marketing Promotional Information



How Consumers Prefer to Receive General Information at Home



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

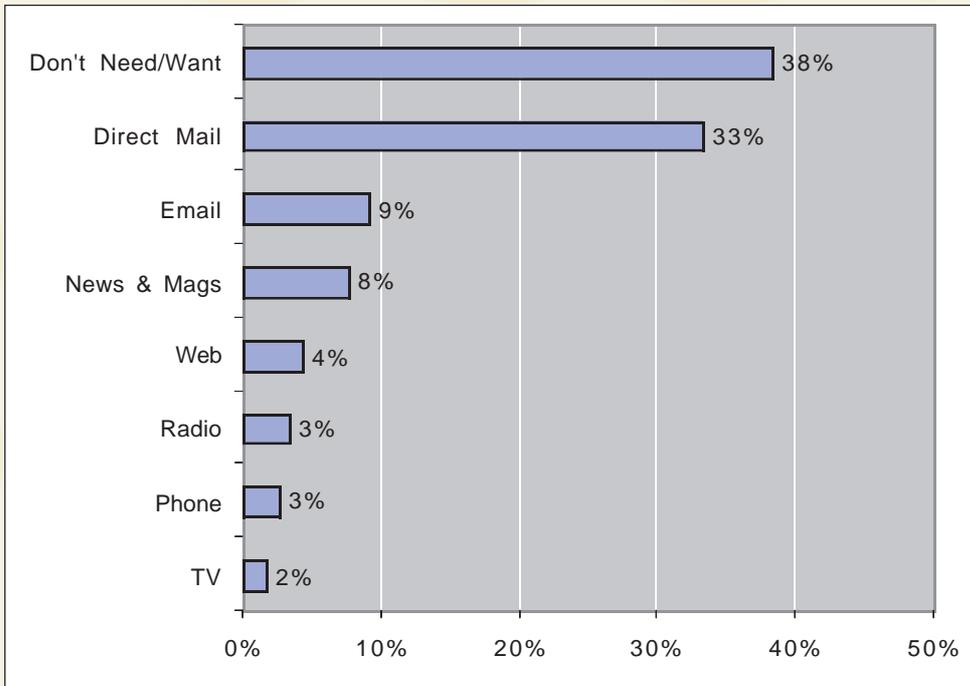
How Consumers Prefer to Receive General Information at Work and Automotive Information

38% of Consumers don't need or want general information sent to them at work. Direct Mail (33%) is the favoured media of Consumers to receive General Information at Work.

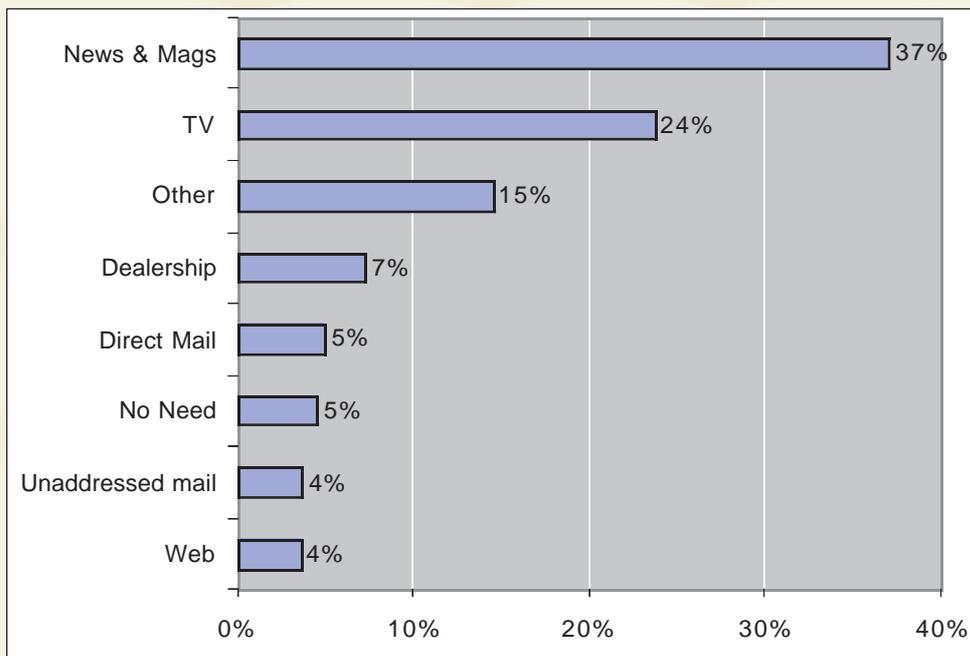
37% of Consumers nominate Newspapers and Magazines as their preferred media to receive Automotive Information.

Direct Mail

How Consumers Prefer to Receive General Information at Work



How Consumers Prefer to Receive Automotive Information



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

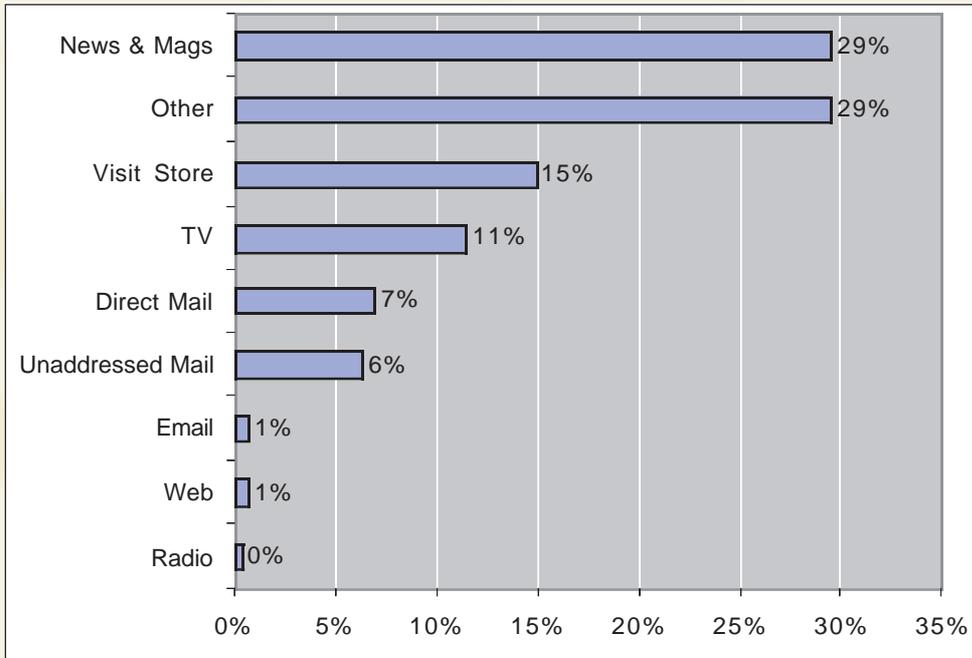
How Consumers Prefer to Receive Travel/Holiday Information and Loyalty Program Information

29% of Consumers prefer to receive
Travel/Holiday Information via
Newspapers and Magazines, closely
followed by other media forms.

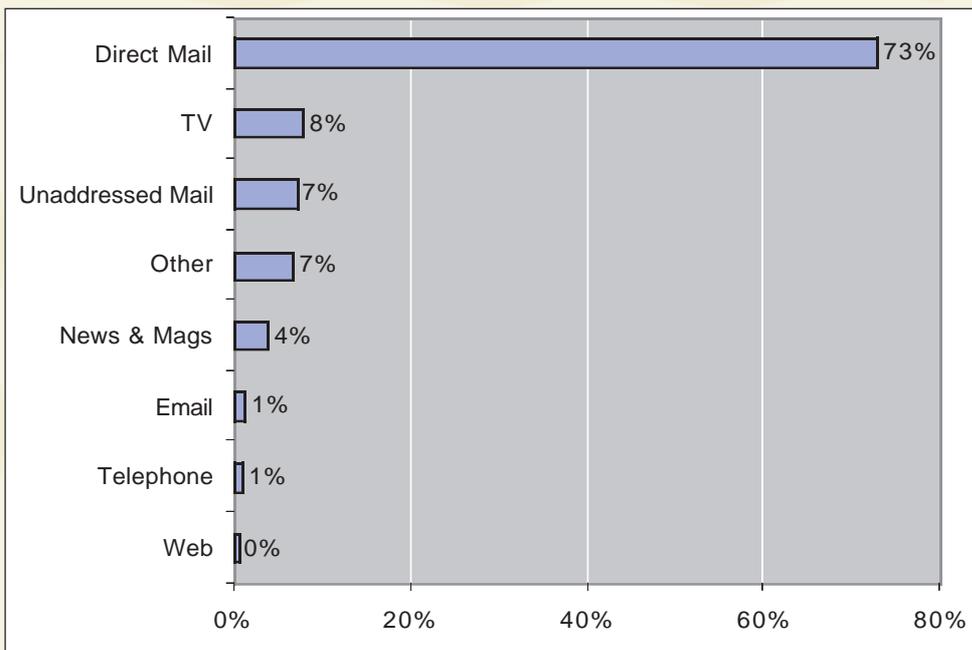
73% of Consumers prefer to receive
Loyalty Program Information via
Direct Mail.

Direct Mail

How Consumers Prefer to Receive Travel/Holiday Information



How Consumers Prefer to Receive Loyalty Program Information



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

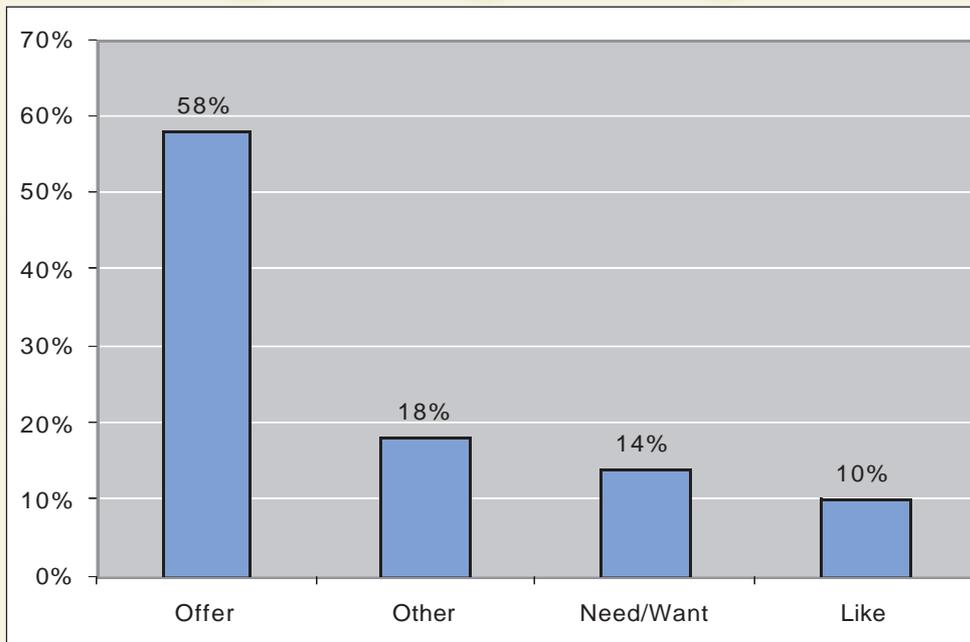
Marketing Media in Australia

What Prompts Consumers to Respond to Direct Mail

Consumers say the offer (58%) is the element that most prompts them to respond to Direct Mail.

Direct Mail

What Prompts Consumers to Respond



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Percentage of Direct Mail is Opened and Read

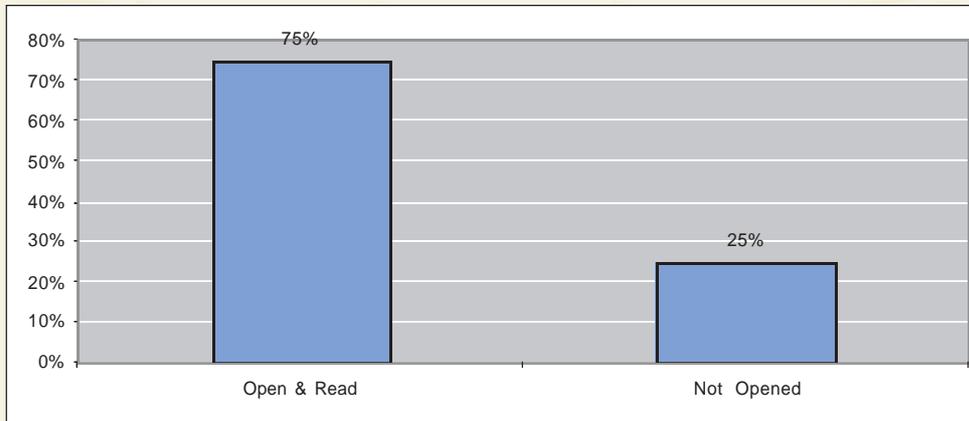
Consumers open and read 75% of the Direct Mail they receive.

The 35-49 age group opens and reads the highest percentage of Direct Mail received.

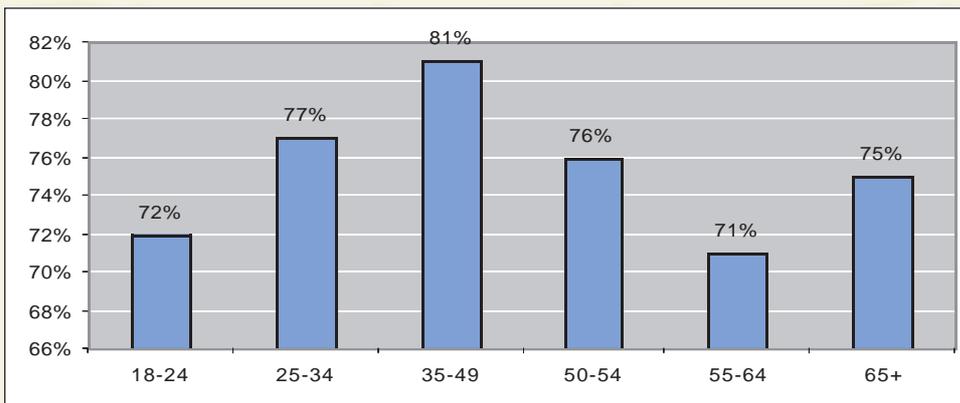
The \$100K+ income bracket opens and reads the highest percentage of Direct Mail received.

Direct Mail

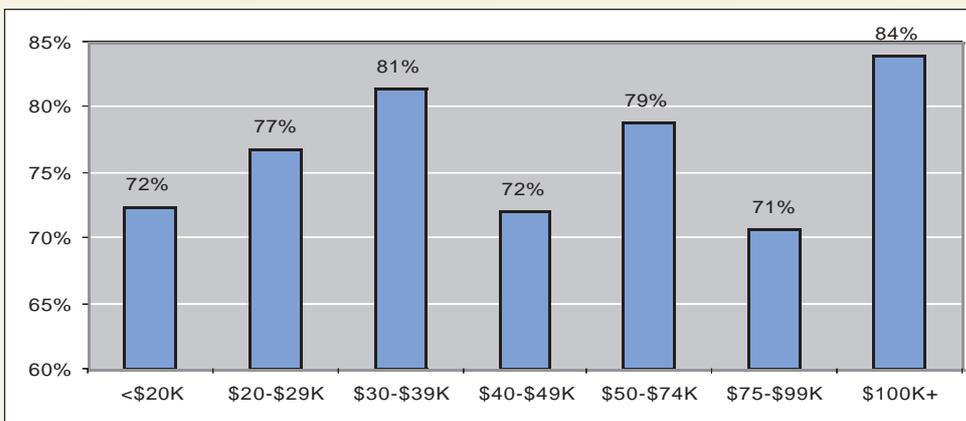
What Percentage is Opened and Read



By Age



By Household Income



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

Do Consumers Pass On Advertising Information of Interest to Them to Others

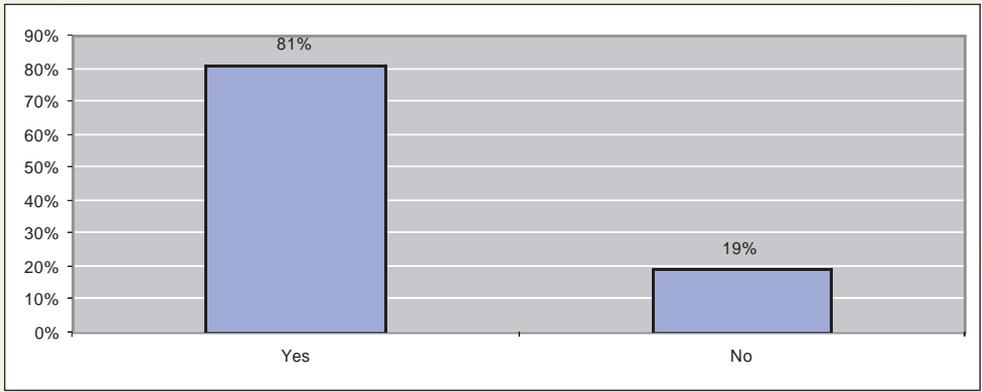
81% of Consumers say they pass Advertising Information of interest to them onto other people.

18-34 year olds are most likely to pass on Advertising Information of interest to them to other people.

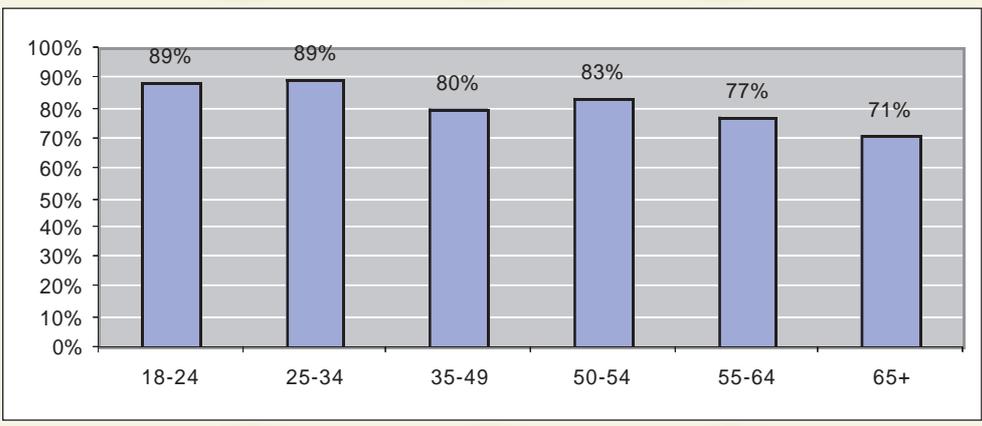
The \$30-39K income bracket is most likely to pass on Advertising Information of interest to them to other people.

Advertising Material

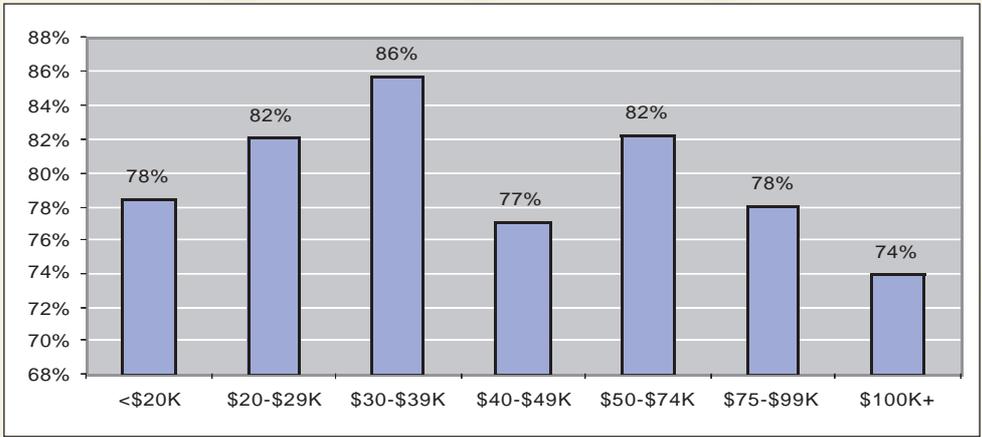
Do Consumers Pass On Advertising Information of Interest to Them to Others



Yes - By Age



Yes - By Household Income



Base: Graph 1 = Total Sample. Graphs 2 & 3 Sample = 891.
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Percentage of Consumers are Aware of SMS Advertising Messaging

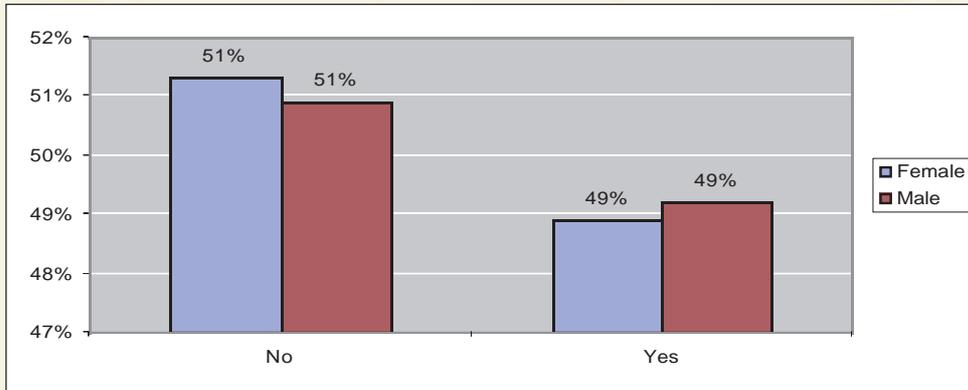
49% of Consumers say they are aware of SMS Advertising Messaging.

The 18-24 age bracket is most aware of SMS Advertising Messaging.

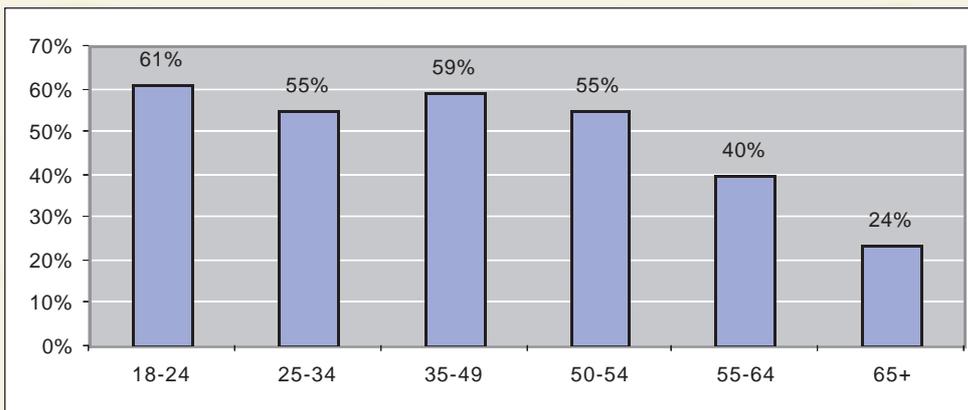
The \$75-99K income bracket is most aware of SMS Advertising Messaging.

SMS Advertising Messaging

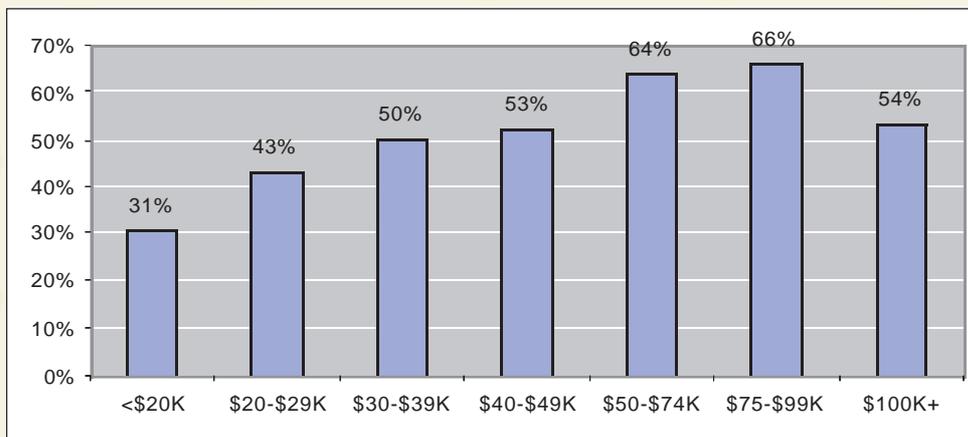
Are Consumers Aware of It



Yes - By Age



Yes - By Household Income



Base: Graph 1 = Total Sample. Graphs 2 & 3 Sample = 539.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

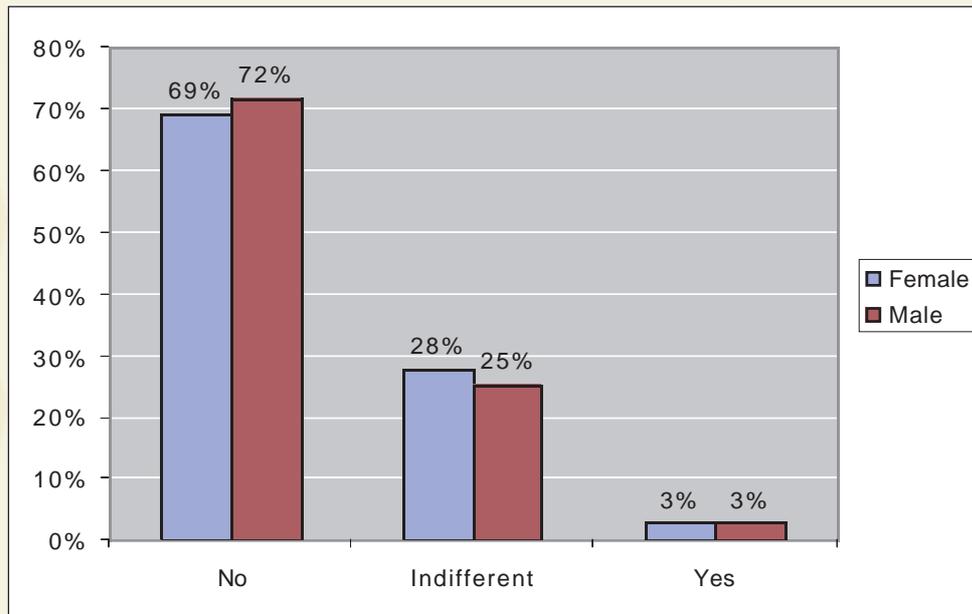
Do Consumers Enjoy SMS Advertising Messaging

Of the 49% of Consumers who are aware of SMS Advertising Messaging, 31% of females and 28% of males (14% of population) either enjoy or are indifferent to SMS Advertising Messaging.

Graphs as to age and household income have not been produced due to the small sample size of those who enjoy SMS Advertising Messaging (35).

SMS Advertising Messaging

Do Consumers Enjoy It



Base: Sample = 539.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia



General Questions - Business People



Marketing Media in Australia

Most Effective Media Overall

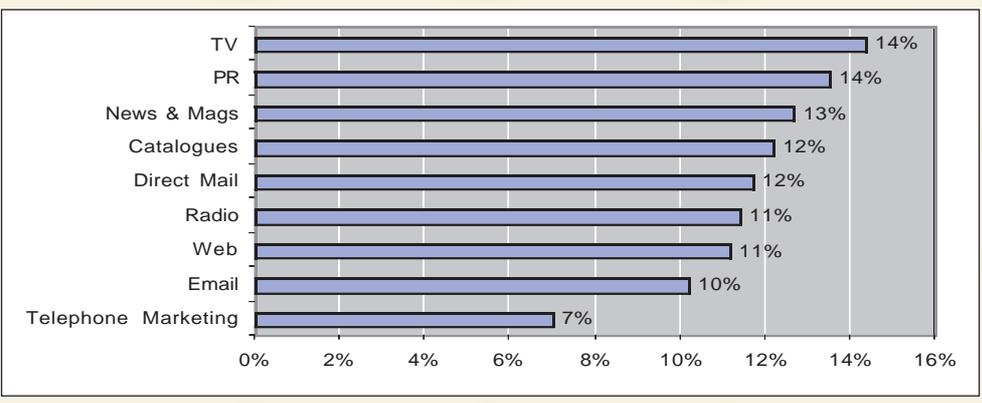
Business Receivers nominate TV Advertising just ahead of Public Relations (PR) as the most effective media.

Business Senders nominate TV Advertising ahead of PR as the most effective media.

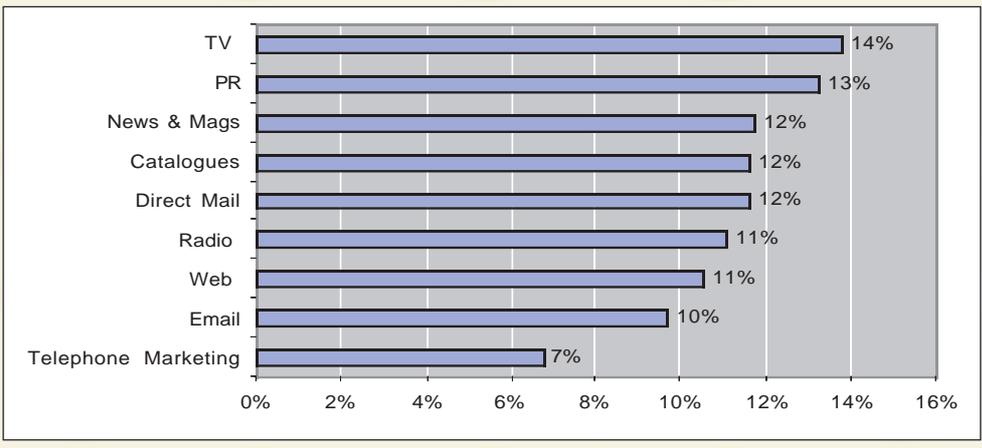
Gatekeepers and Personal Assistants nominate TV Advertising and Radio Advertising as the most effective media.

Business People Most Effective Media Overall

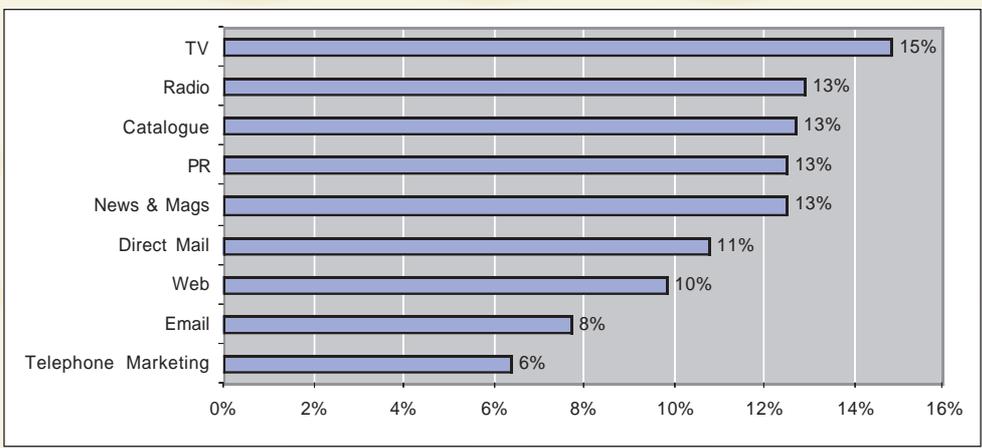
Receivers



Senders



Gatekeepers & Personal Assistants



Base: Graph 1 Sample = 213. Graph 2 Sample = 187. Graph 3 Sample = 100.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Most Effective Media for Response and Conversion Rates

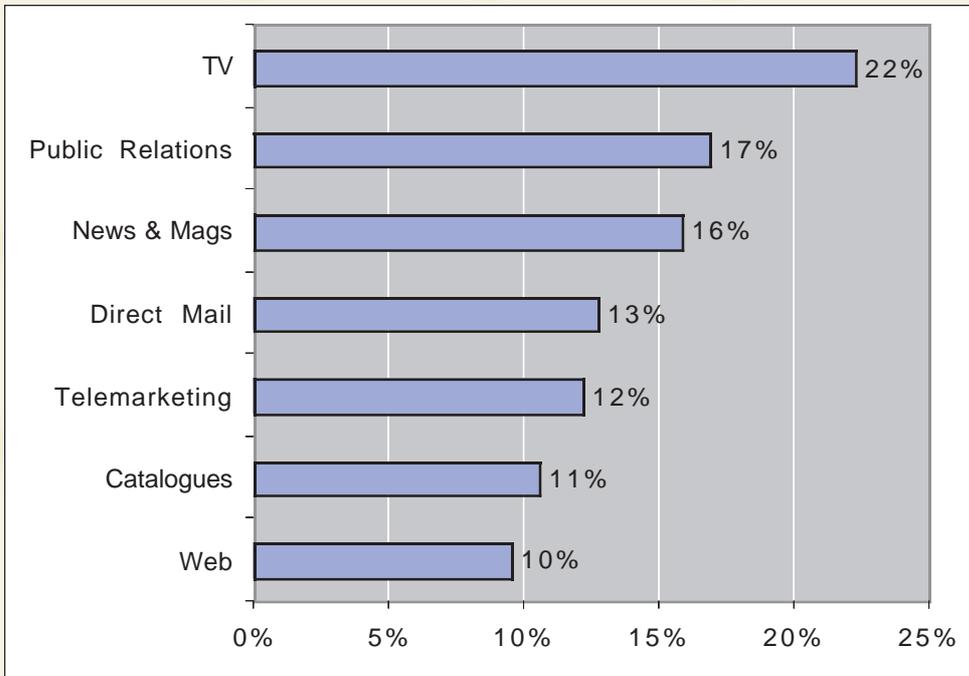
Business Receivers believe that TV Advertising produces the best response and conversion rates.

Business Senders believe that TV Advertising produces the best response and conversion rates.

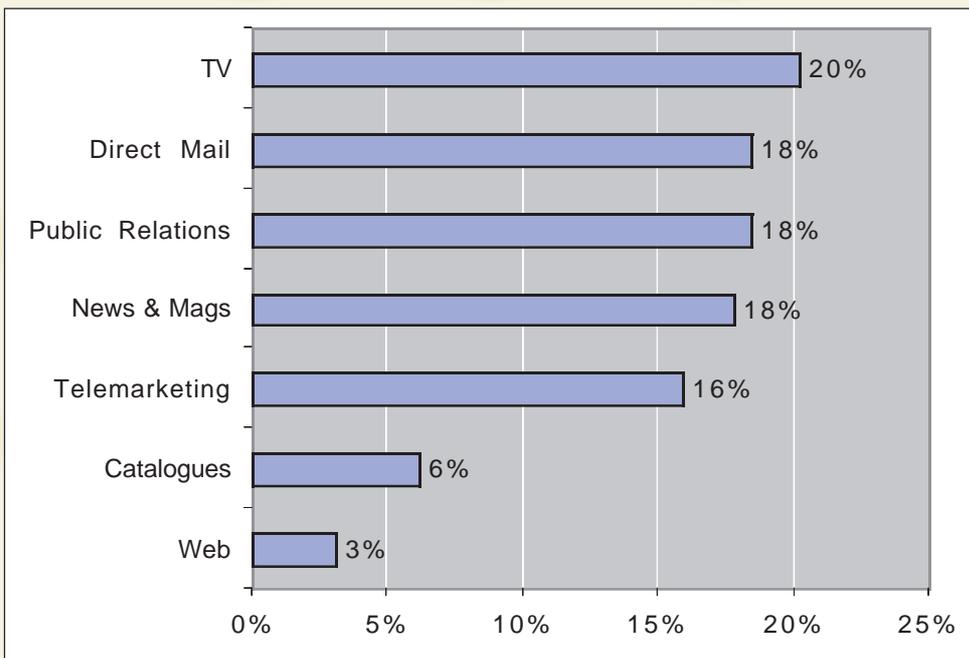
Business People

Most Effective Media for Response and Conversion Rates

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

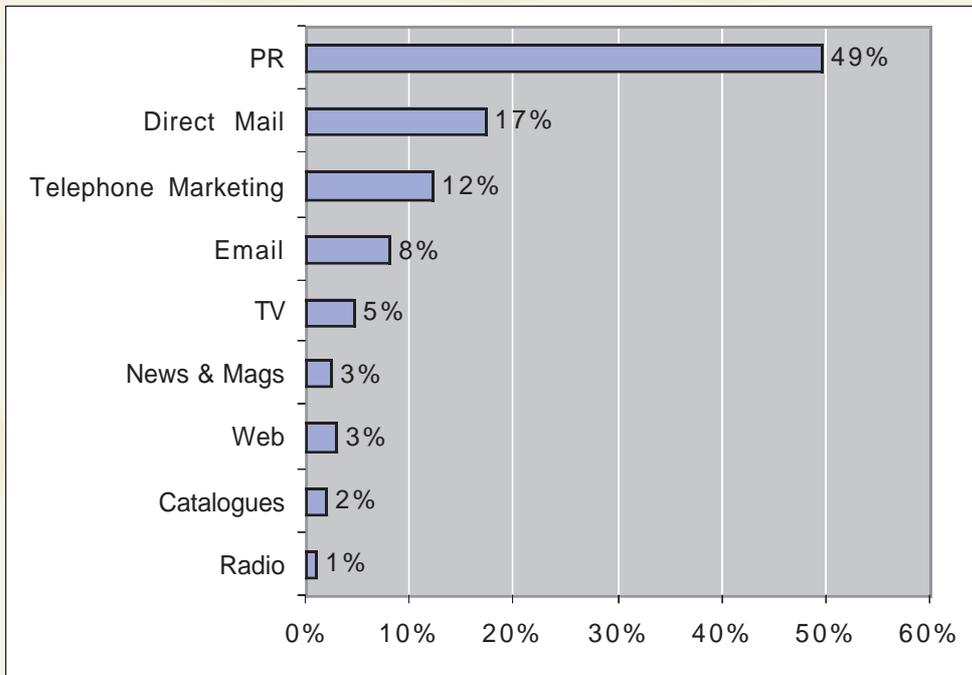
Most Effective Media for Relationship Building

Business Receivers nominate PR ahead of Direct Mail as the most effective media to build a relationship.

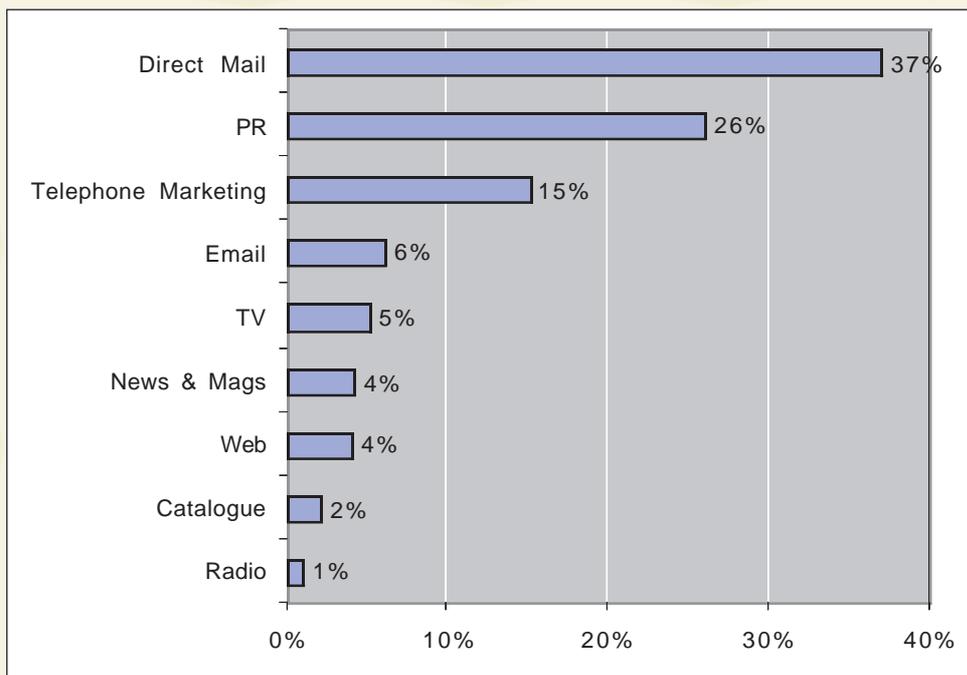
Business Senders nominate Direct Mail ahead of PR as the most effective media to build a relationship.

Business People Most Effective for Relationship Building

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Most Effective Media for Brand Building

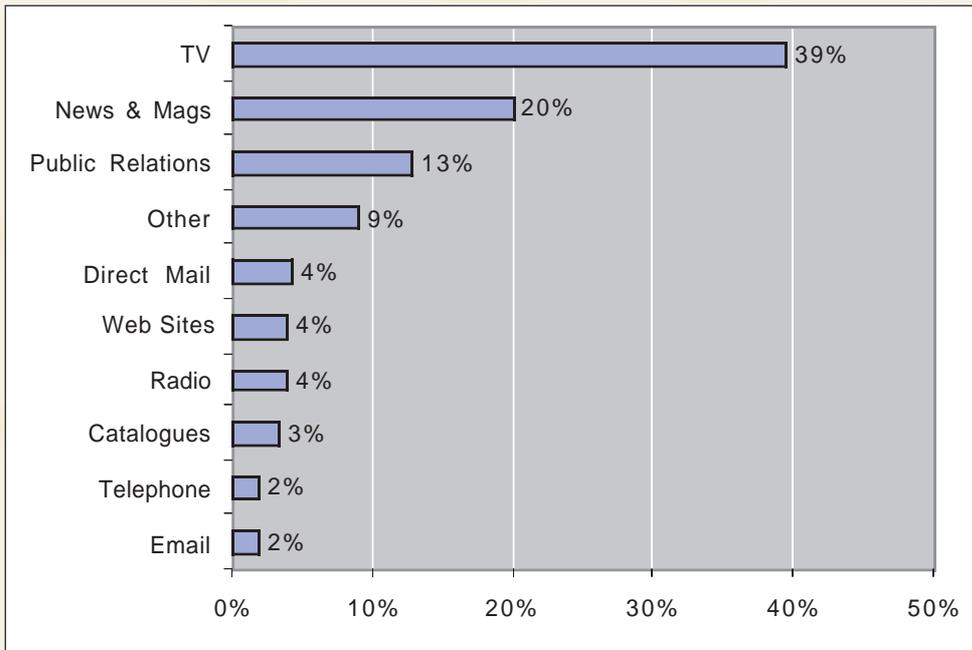
Business Receivers nominate TV Advertising followed by Newspaper and Magazine Advertising as the most effective media for Brand Building.

Business Senders nominate TV Advertising as the most effective media for Brand Building.

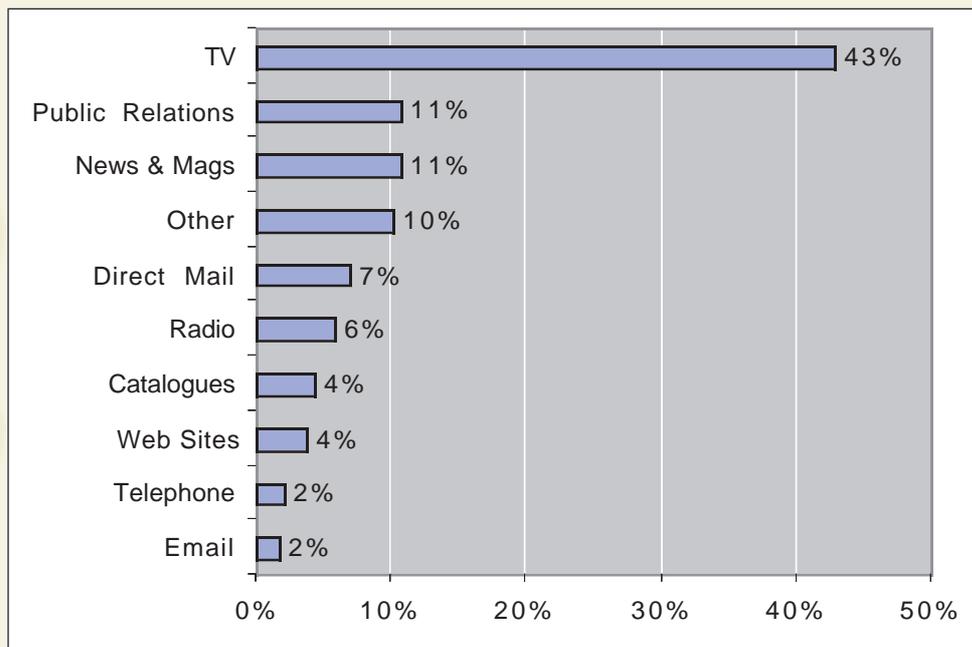
Business People

Most Effective Media for Brand Building

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Most Effective Media for Influencing Behaviour

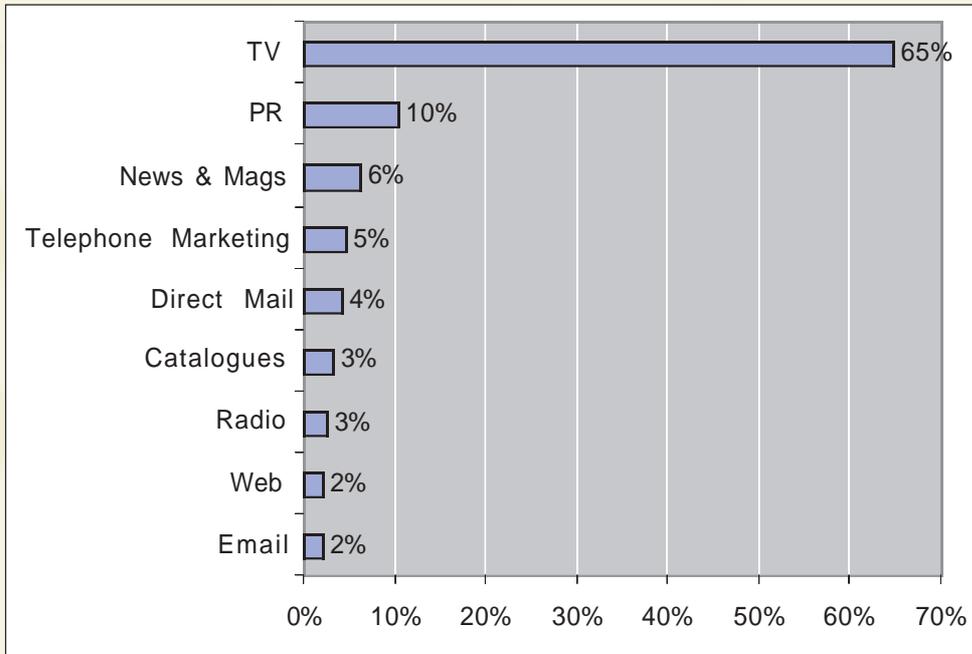
Business Receivers clearly nominate TV Advertising as the most effective media for influencing behaviour.

Business Senders clearly nominate TV Advertising as the most effective media for influencing behaviour.

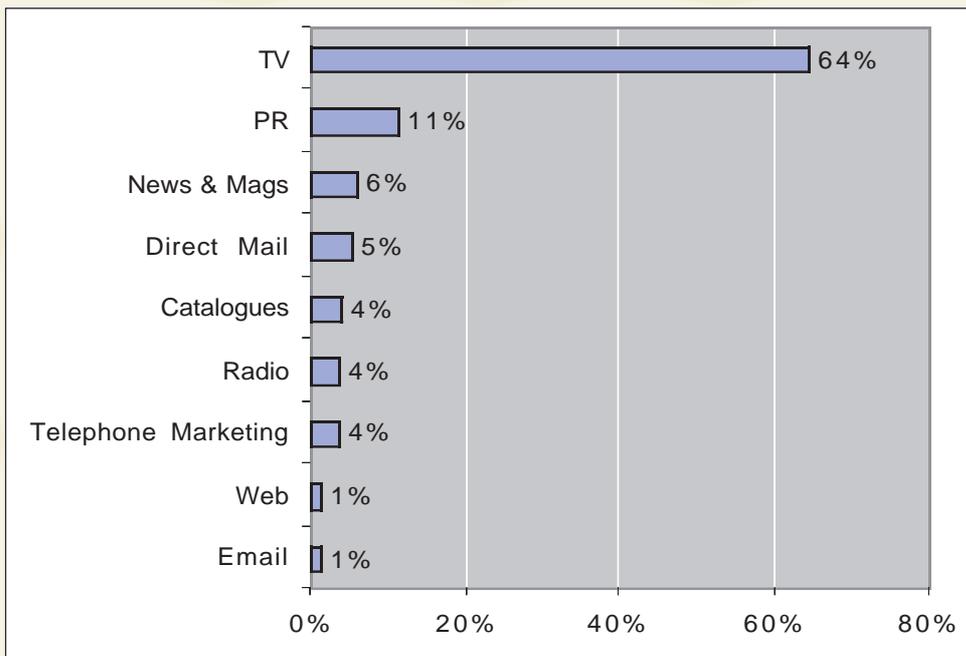
Business People

Most Effective Media for Influencing Behaviour

Receivers



Senders



Marketing Media in Australia

Most Effective Media to Attract People to a Web Site

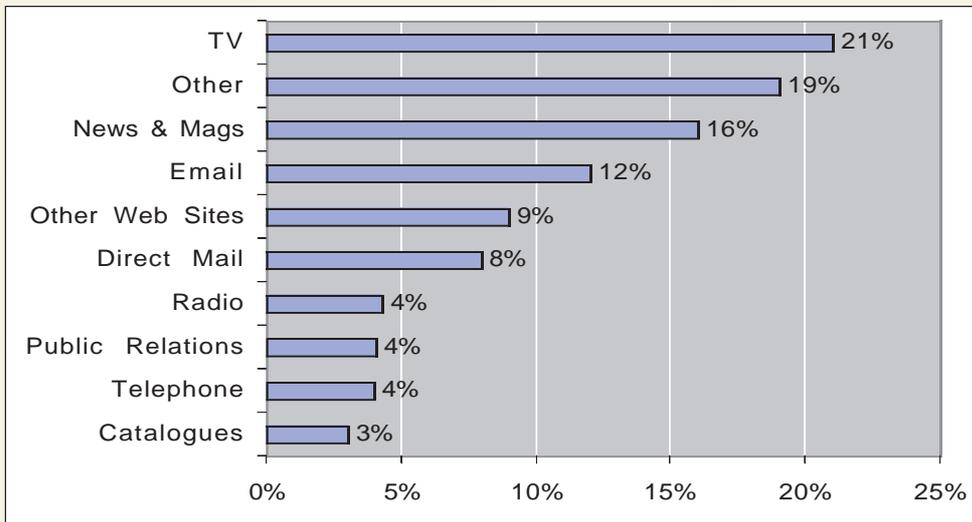
Business Receivers say TV Advertising is the most effective media to attract people to a web site.

Business Senders are more likely to nominate 'Other' media as the most effective media to attract people to a web site.

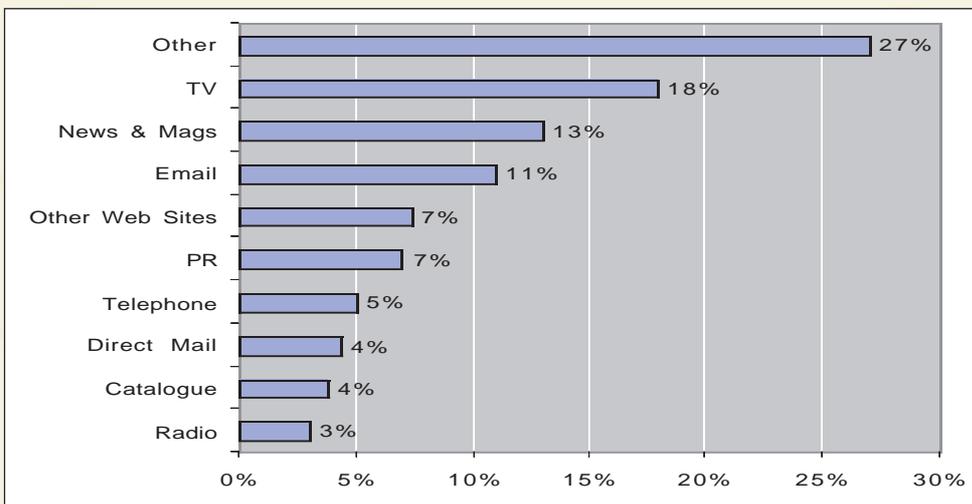
Business People

Most Effective Media to Attract People to a Web Site

Receivers



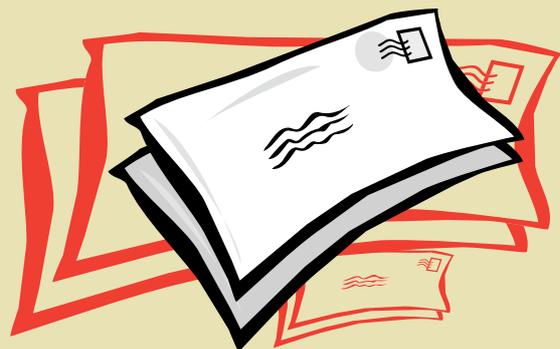
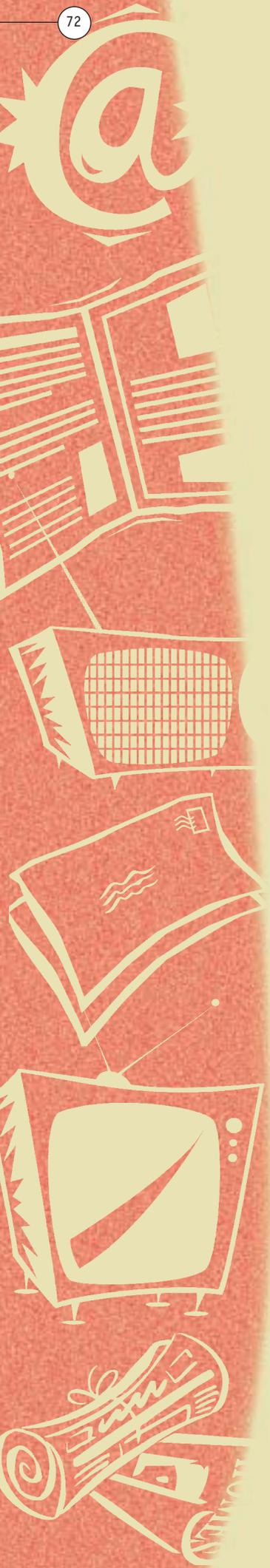
Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

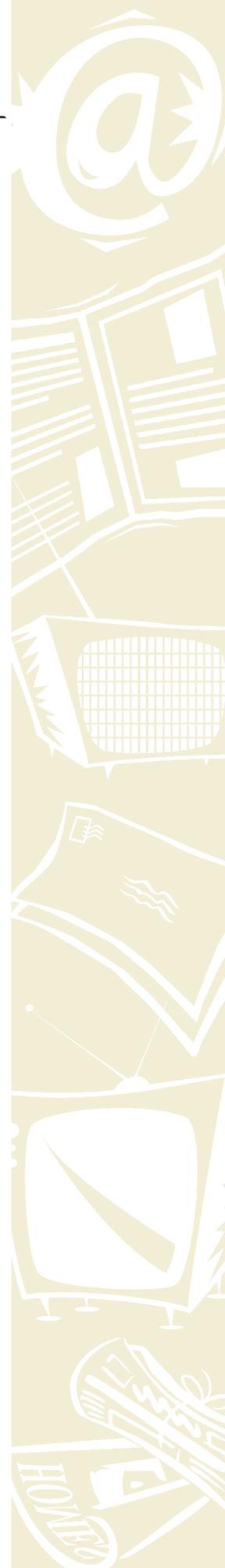


Direct Mail Advertising

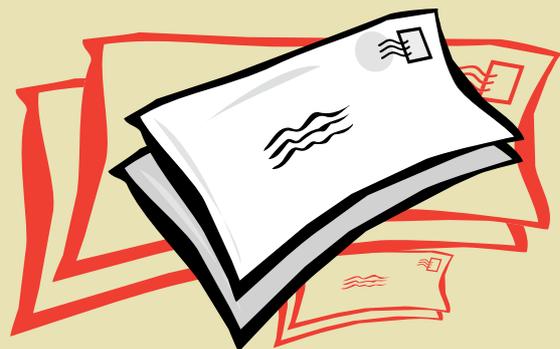
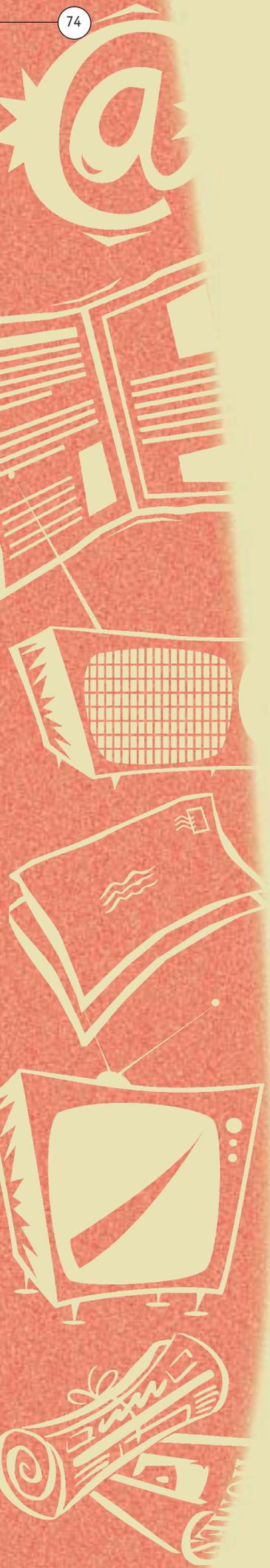
What Consumers Think

Contents

● Do Consumers Enjoy Receiving Solicited Personalised Mail	77
● What Consumers Like About Receiving Solicited Personalised Mail	79
● Does Receiving Solicited Personalised Mail Influence the Buying Decision	81
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● What Percentage of Consumers Purchase as a Result of UPM - NPR	107



Marketing Media in Australia



Solicited Personalised Mail



Marketing Media in Australia

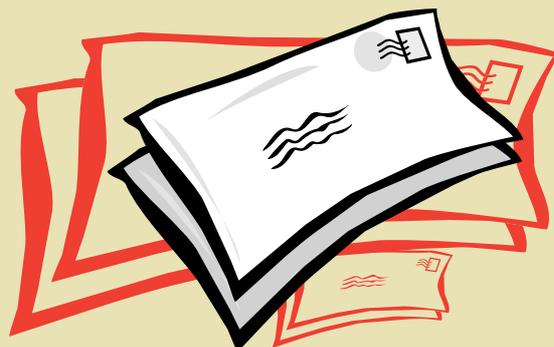
Do Consumers Enjoy Receiving Solicited Personalised Mail

97% of Consumers either enjoy or are indifferent to receiving Solicited Personalised Mail.

There appears to be little difference in the attitudes of male and female Consumers in regard to enjoying receiving Solicited Personalised Mail.

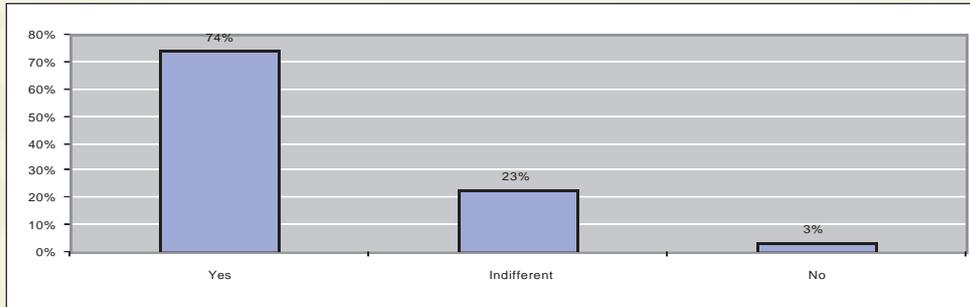
The 50-54 age group most enjoys receiving Solicited Personalised Mail.

The <\$20K household income bracket most enjoys receiving Solicited Personalised Mail.

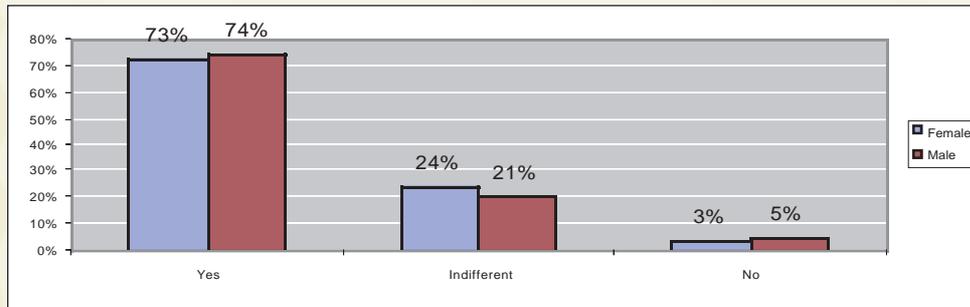


Solicited Personalised Mail

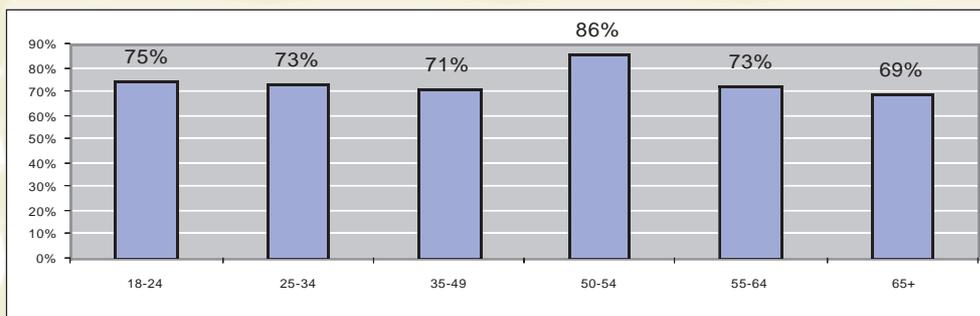
Do Consumers Enjoy Receiving It



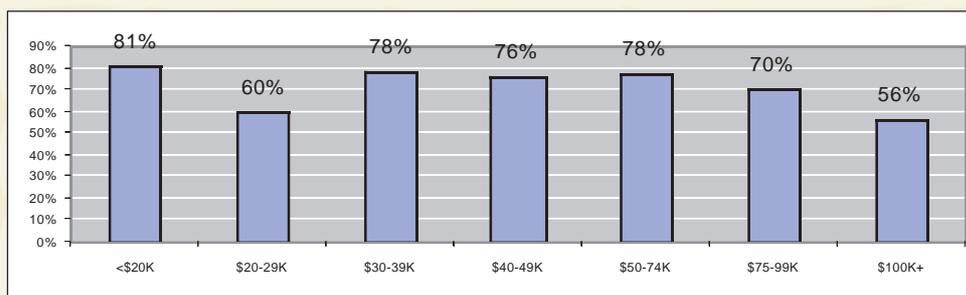
By Sex



Yes - By Age



Yes - By Household Income



Base: Graph 1 & 2 = Total Sample. Graphs 3 & 4 Sample = 812.
Source: ResponseAbility Consumer Research 2001.

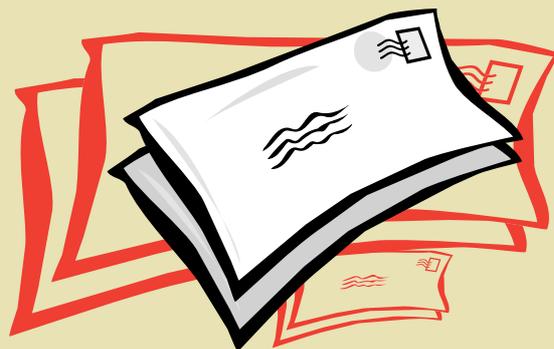
Marketing Media in Australia

What Consumers Like About Receiving Solicited Personalised Mail

98% of Consumers can nominate an element of receiving Solicited Personalised Mail that they like.

The main reasons Consumers enjoy receiving Solicited Personalised Mail are that they find it informative and relevant, it is something that they have asked for and it is something that aids the purchasing process at a time convenient to the Consumer.

The chart 'What Consumers Don't Like About Receiving Personalised Mail' has not been produced due to the small sample (35) of Consumers who can nominate an element of receiving Solicited Personalised Mail that they don't like.



Solicited Personalised Mail

What Consumers Like About It

APPEAL	COMMENTS	%
Informative & Relevant	Able to stay informed about topics of interest Rural location – helps us to stay informed Convenient way to find out information Specific to my information needs	42
Other	Knowledge of prices and new products Access to exclusive offers and prices Allows me to stay in touch Enjoy all types of mail	25
Get What I Ask For	Interested in the first place – enjoy receiving it I know what I am receiving so not annoyed It is something I have asked for You get what you asked for	24
Shopping Assistance	Able to make purchase decision without pressure Allows me to make smart buying decisions Info about new products/shop from home Convenient way to shop	5
Do Things in Own Time	Convenient relevant info – read when want Peruse products at own leisure/convenience Allows me time to think things through I am in control of the buying process	4

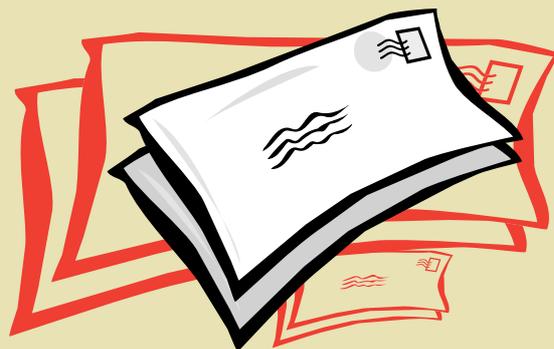
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

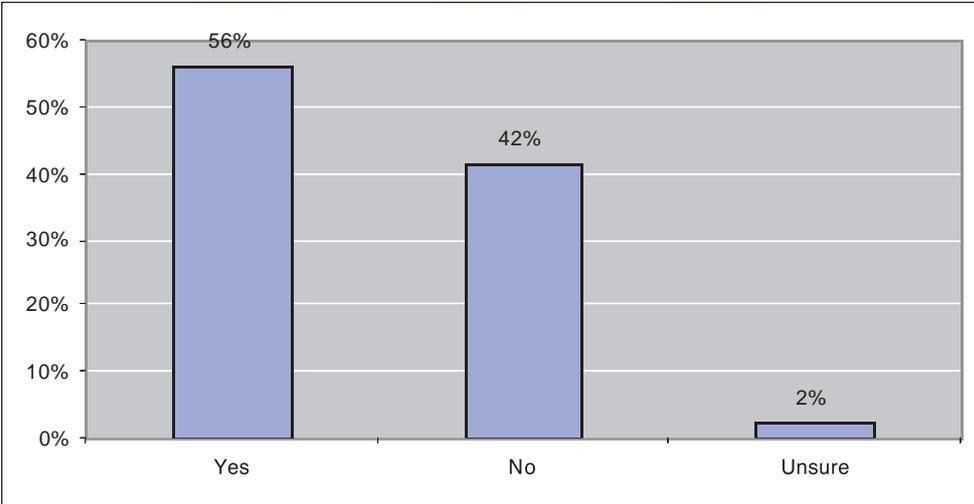
Does Receiving Solicited Personalised Mail Influence the Buying Decision

56% of Consumers say that receiving Solicited Personalised Mail does influence their buying decision.



Solicited Personalised Direct Mail

Does It Influence the Buying Decision



YES

I get stuff sent to me so I can make a decision
Of course it does - that's why I ask for it
It certainly does

NO

It's usually just information for the kids' school projects
I am not in the market to buy things
I don't think so - no

UNSURE

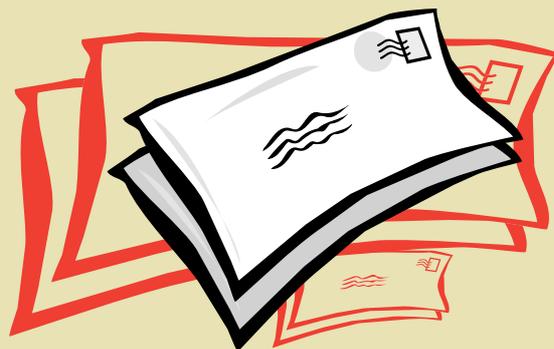
I suppose if I have asked for it - I don't know
I am open to many influences
I am not sure

Base: Sample = 1,100.
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

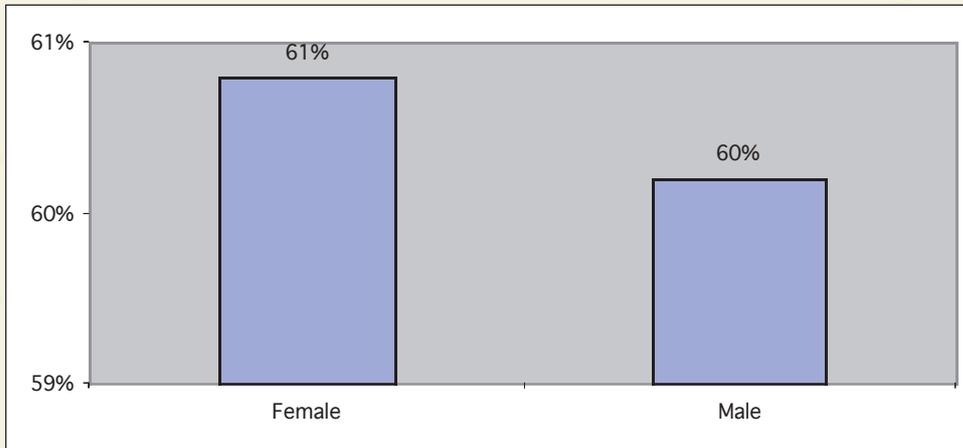
What Percentage of Consumers Purchase as a Result of Receiving Solicited Personalised Mail

61% of female Consumers and 60% of male Consumers say they purchase as a result of receiving Solicited Personalised Mail.



Solicited Personalised Mail

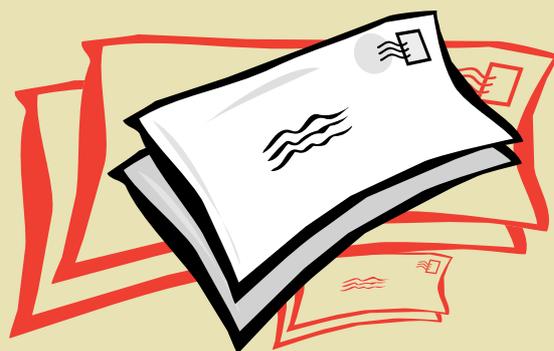
What Percentage of Consumers Purchase as a Result of Receiving It



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia



Unsolicited Personalised Mail - Prior Relationship



Marketing Media in Australia

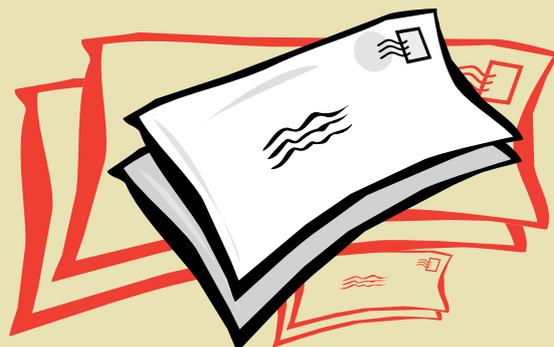
Do Consumers Enjoy Receiving Unsolicited Personalised Mail - Prior Relationship

89% of Consumers either enjoy or are indifferent to receiving Unsolicited Personalised Mail - Prior Relationship.

There appears to be little difference in the attitudes of male and female Consumers in regard to enjoying receiving Unsolicited Personalised Mail - Prior Relationship.

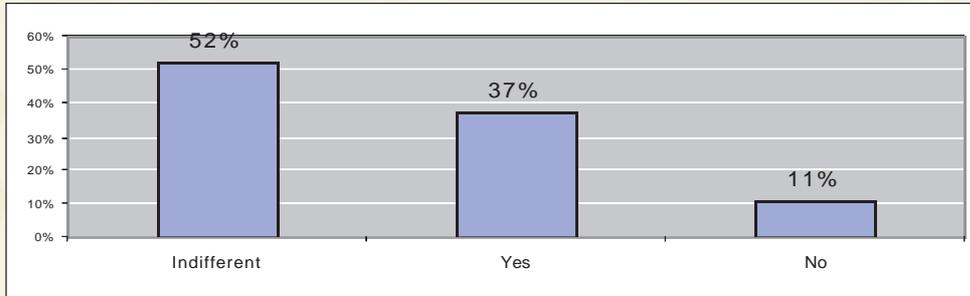
The 35-49 age group most enjoys receiving Unsolicited Personalised Mail - Prior Relationship.

The \$75-\$99K household income bracket most enjoys receiving Unsolicited Personalised Mail - Prior Relationship.

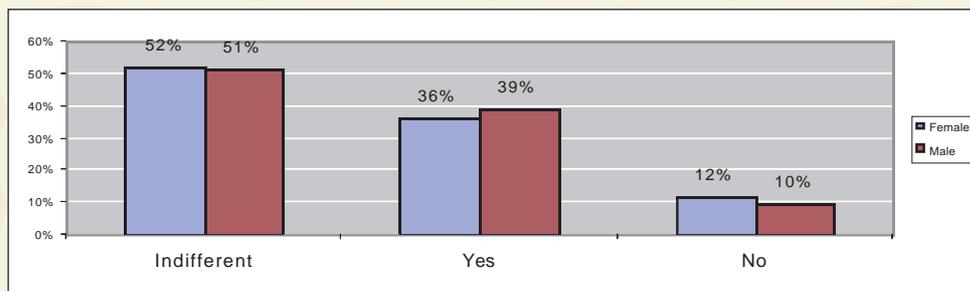


Unsolicited Personalised Mail - Prior Relationship

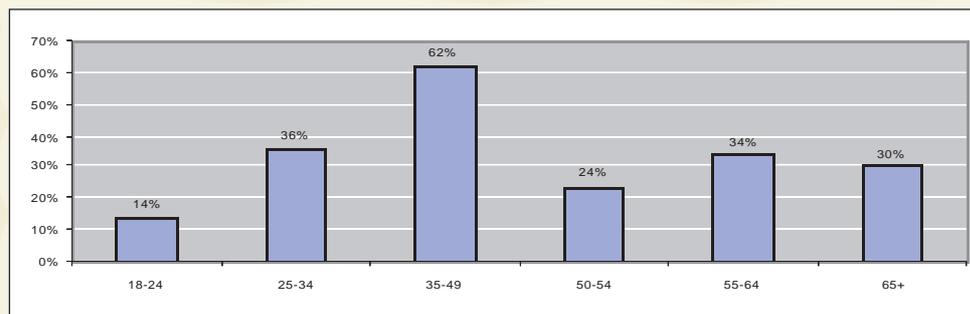
Do Consumers Enjoy Receiving It



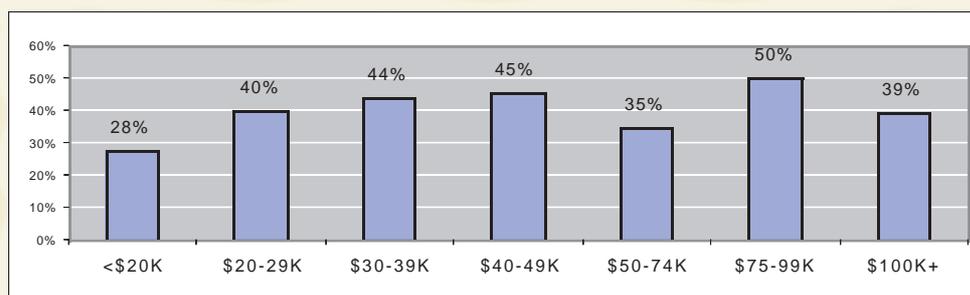
By Sex



Yes - By Age



Yes - By Household Income



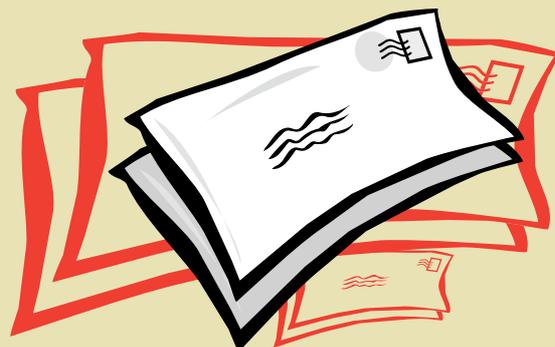
Base: Graph 1 & 2 = Total Sample. Graphs 3 & 4 Sample = 411.
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Like About Receiving Unsolicited Personalised Mail - Prior Relationship

87% of Consumers can nominate an element of receiving Unsolicited Personalised Mail - Prior Relationship that they like.

The main reasons Consumers like receiving Unsolicited Personalised Mail - Prior Relationship are that it keeps them informed with useful, informative and necessary information, that communication is being sent for a reason and that some Consumers feel better about themselves and the company as a consequence of receiving the mail.



Unsolicited Personalised Mail - Prior Relationship

What Consumers Like About It

APPEAL	COMMENTS	%
Keeps Me Informed	I like being kept up-to-date with important info Being kept informed creates incentive/inertia Awareness of new products/services Always good to keep up-to-date	49
Useful & Relevant	Info is informative, useful and necessary to me Gives me the opportunity to shop around Gives me vital information Comes at the right time	15
Other	Targeted information specific to my needs They need to and should keep in touch It's part of life in the big smoke Some of it is very colourful	15
Nothing	I would prefer they wouldn't send it to me They should ask my permission first I'd rather not receive it Nothing much	13
Necessary Information	It's often a necessary communication It's sent to me for a reason I find most of it necessary I use the information often	4
Makes Me Feel Good	It makes me feel like they still care about me It makes me trust the company more I like the personal touch It's just good to receive	4

Base: Sample = 1,100.

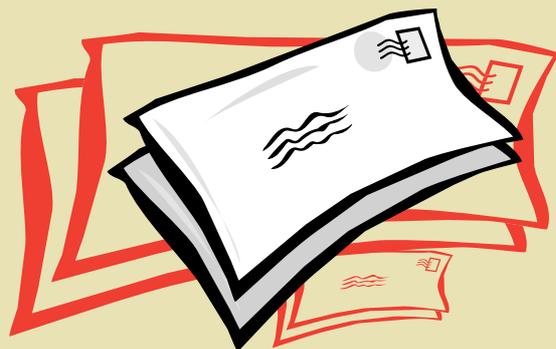
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Don't Like About Unsolicited Personalised Mail - Prior Relationship

65% of Consumers can nominate an element of receiving Unsolicited Personalised Mail - Prior Relationship that they don't like.

The main reasons that those Consumers do not like receiving Unsolicited Personalised Mail - Prior Relationship are that there is too much of it, that some of it is junk, that it can contain bad news and the fact that the Consumers did not ask for it to be sent.



Unsolicited Personalised Mail - Prior Relationship

What Consumers Don't Like About It

DISLIKE	COMMENTS	%
Nothing	Even if it's not good news I need to know I like receiving Direct Mail I like being kept informed I need to know	35
Other	Misuse of my personal details Forces me to make a decision Bad for the environment Waste of paper and time	32
Too Much	Too much repetitive and irrelevant information Do business with them once and it never stops There's just too much of it Too much rubbish	10
Junk	Truck loads of irrelevant information Too much of it is advertising junk Too much junk in the envelope Most of it's junk	9
Can Be Bad News	Don't like getting negative information Don't like receiving info with bills It can be the bearer of bad news Sometimes it's not good news	9
No Permission	Just because I bought once doesn't mean I want it Some of it can have nothing to do with my wants They should ask my permission to send it I did not ask for it	5

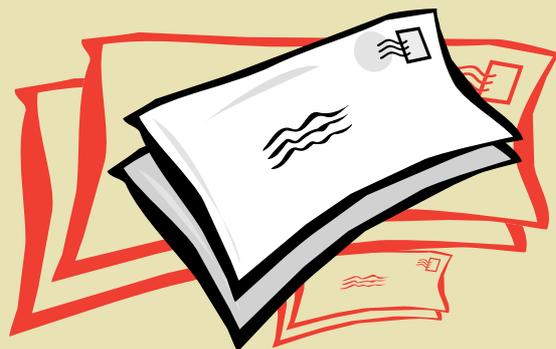
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

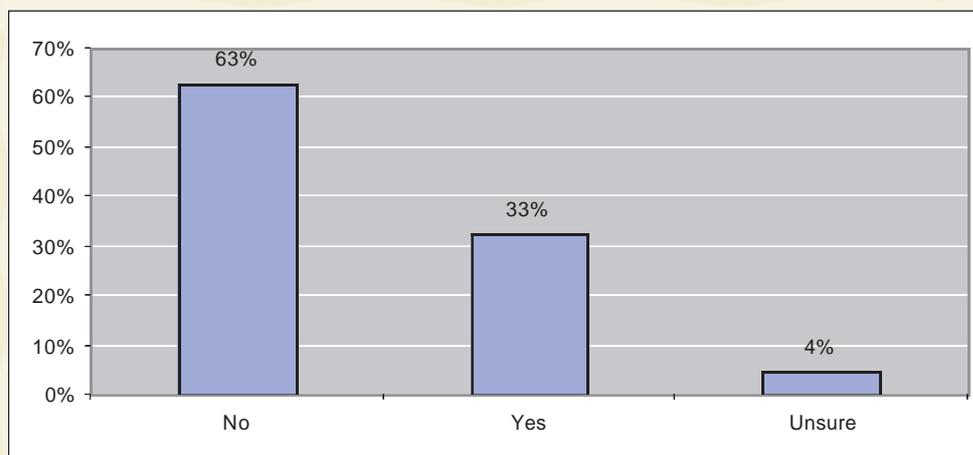
Does Receiving Unsolicited Personalised Mail - Prior Relationship Influence the Buying Decision

33% of Consumers say that receiving Unsolicited Personalised Mail - Prior Relationship does influence their buying decision.



Unsolicited Personalised Mail - Prior Relationship

Does It Influence the Buying Decision



YES

If I have a need and the offer is good
 This sort of stuff tends to get me
 If it's something I need

NO

Not if I didn't ask for the information to be sent to me
 I don't let myself be influenced by those things
 No, I tend to be more impulsive

UNSURE

That depends on a lot of things
 I really don't know
 It may, it may not

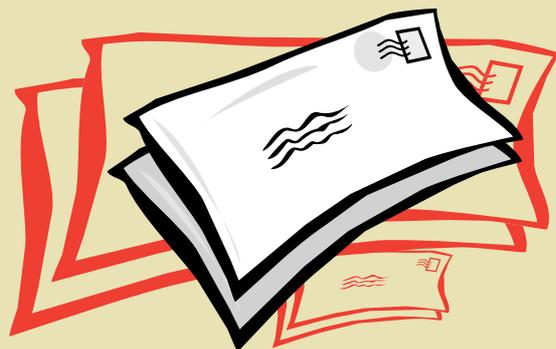
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

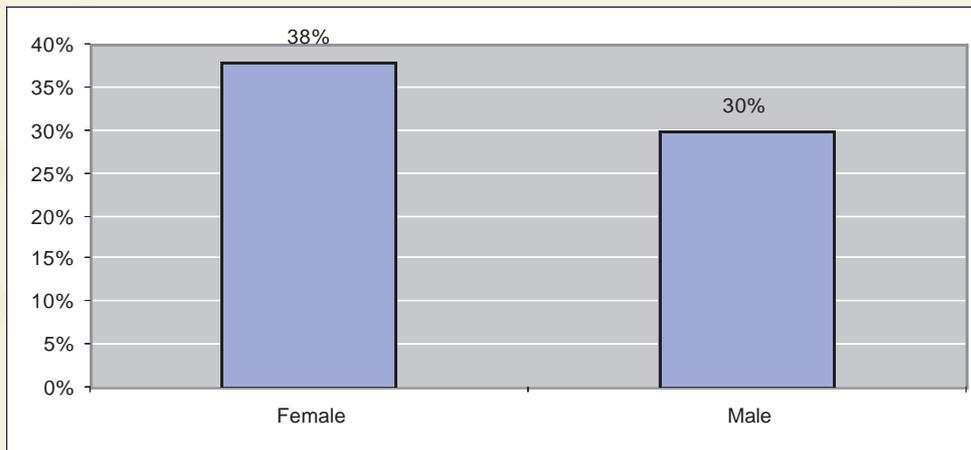
What Percentage of Consumers Purchase as a Result of Unsolicited Personalised Mail - Prior Relationship

38% of female Consumers and 30% of male Consumers say they purchase as a result of receiving Unsolicited Personalised Mail - Prior Relationship.



Unsolicited Personalised Mail - Prior Relationship

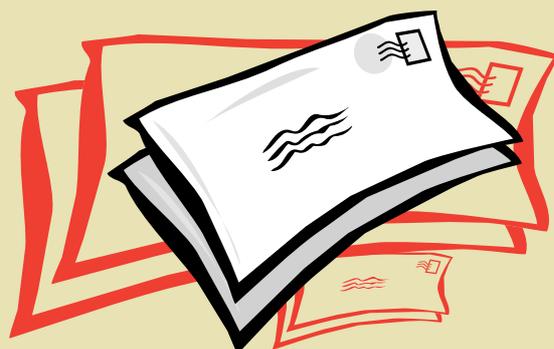
What Percentage of Consumers Purchase as a Result of Receiving It



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia



Unsolicited Personalised Mail - No Prior Relationship



Marketing Media in Australia

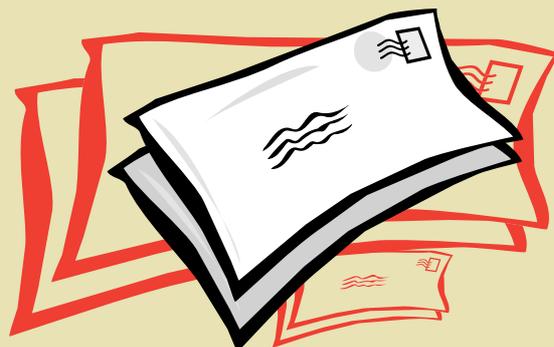
Do Consumers Enjoy Receiving Unsolicited Personalised Mail - No Prior Relationship

41% of Consumers either enjoy or are indifferent to receiving Unsolicited Personalised Mail - No Prior Relationship.

There appears to be little difference in the attitudes of male and female Consumers in regard to enjoying receiving Unsolicited Personalised Mail - No Prior Relationship.

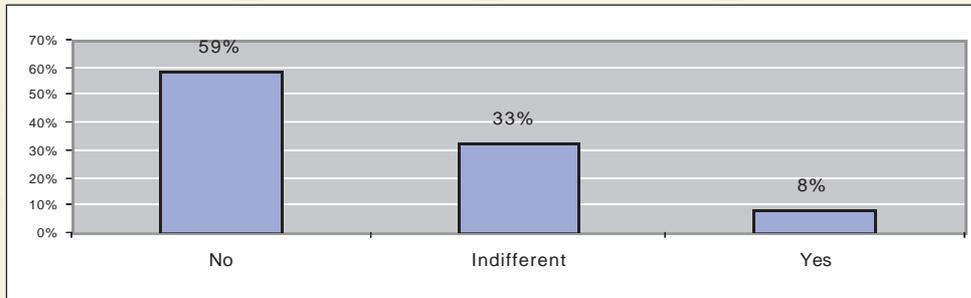
The 50-54 age group most enjoys receiving Unsolicited Personalised Mail - No Prior Relationship.

The \$20-39K household income bracket most enjoys receiving Unsolicited Personalised Mail - No Prior Relationship.

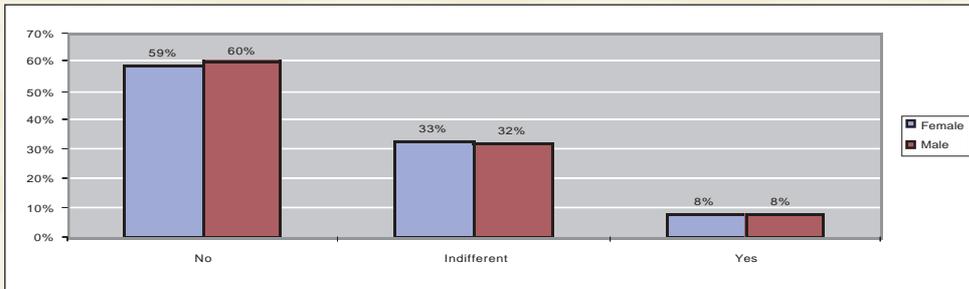


Unsolicited Personalised Mail - No Prior Relationship

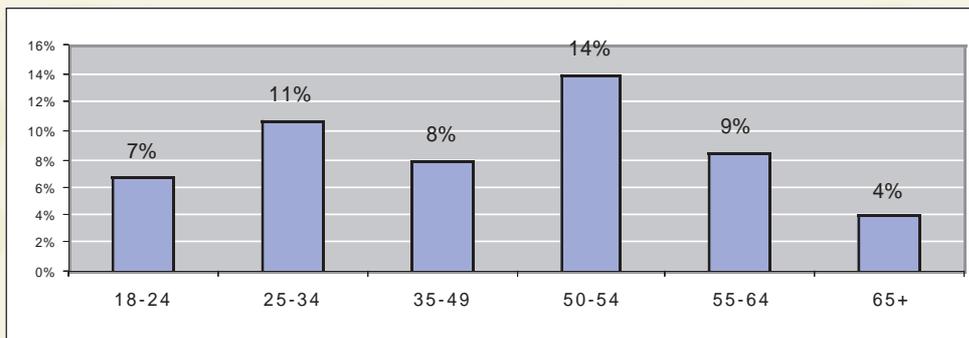
Do Consumers Enjoy Receiving It



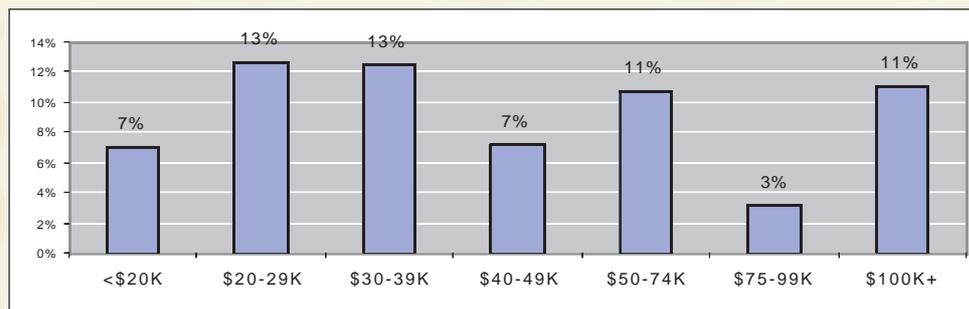
By Sex



Yes - By Age



Yes - By Household Income



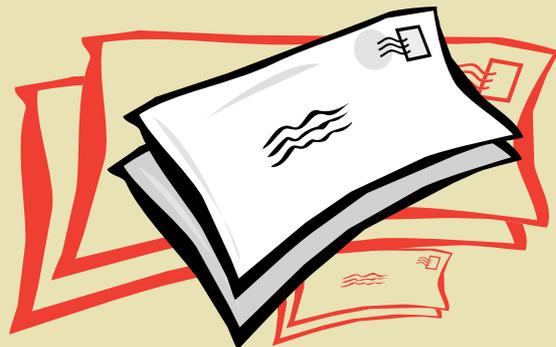
Base: Graph 1 & 2 Sample = 1,100. Graph 3 & 4 Sample = 90.
 Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Like About Receiving Unsolicited Personalised Mail - No Prior Relationship

34% of Consumers can nominate an element of receiving Unsolicited Personalised Mail - No Prior Relationship that they like.

The main reasons that those Consumers like receiving Unsolicited Personalised Mail - No Prior Relationship are the actual act of receipt, the fact that it is perceived to be a personal communication and that it provides useful information. Some Consumers prefer it to be permission based.



Unsolicited Personalised Mail - No Prior Relationship

What Consumers Like About It

APPEAL	COMMENTS	%
Nothing	None of it is relevant to me There's too much of it I just don't like it Nothing really	66
Receiving It	Knowing I am supposed to get it It might be an opportunity It has my name on it I like receiving mail	13
Information	Good information with no depressing news Exposure to new and interesting products I like to know what's available Useful information	11
Personal	Nothing like a personally addressed letter It's got my name on it - that feels special Only if it's personally addressed It's like a personal present	4
Permission Based	I prefer to receive information I have asked for Don't send me stuff I have not asked for I enjoy receiving things I've requested Only if I have requested it	3
Other	I like receiving catalogues I can read it at my leisure Can buy from the mail Helps me shop	3

Base: Sample = 1,100.

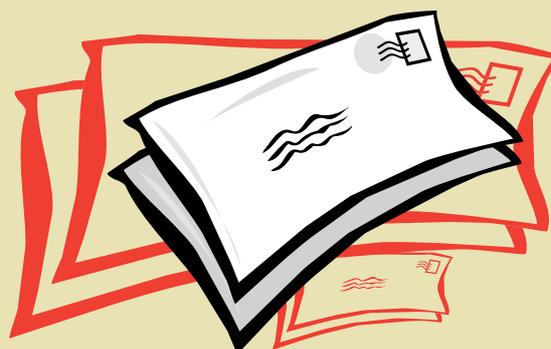
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Don't Like About Receiving Unsolicited Personalised Mail - No Prior Relationship

78% of Consumers can nominate an element of receiving Unsolicited Personalised Mail - No Prior Relationship that they don't like.

The main reasons that those Consumers dislike receiving Unsolicited Personalised Mail - No Prior Relationship relate to privacy issues, concerns about wastage, a belief that there is too much Direct Mail Advertising and issues relating to the relevance of the information received.



Unsolicited Personalised Mail - No Prior Relationship

What Consumers Don't Like About It

APPEAL	COMMENTS	%
Other	A hollow attempt to pretend they know me It give me a false sense of high expectations Charities make you feel guilty I never win anything	39
Nothing	I usually only get things I am interested in I enjoy receiving personalised mail Don't get much of it I like it	22
Privacy	They should not have access to my name My name should not be on any lists Where do they get my details from Breach of my privacy	21
Wasteful	Waste of resources Waste of my time Waste of paper Waste of trees	10
Too Much	Creates too much paper for recycling Too much of it - I don't want it Annoying - too much of it Fills my letterbox	6
Irrelevant	Irrelevant material - wastes my time Irrelevant and a waste of money Irrelevant - I don't ask for it None of it is relevant to me	3

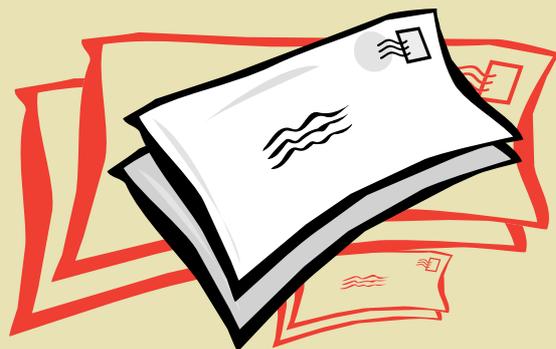
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

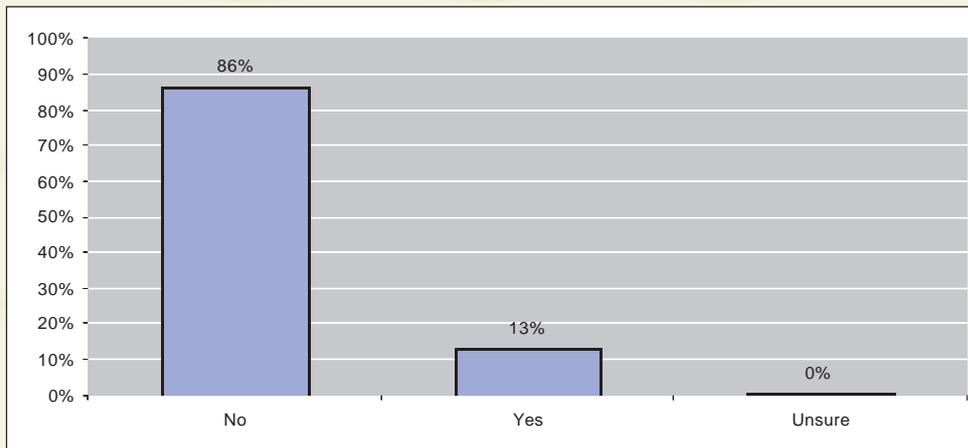
Does Receiving Unsolicited Personalised Mail - No Prior Relationship Influence the Buying Decision

13% of Consumers say that receiving Unsolicited Personalised Mail - No Prior Relationship does influence their buying decisions.



Unsolicited Personalised Mail - No Prior Relationship

Does It Influence the Buying Decision



YES

- I wait until getting information about sales before I shop
- I do most of my shopping from stuff I get in the mail
- I only shop at places where I get discounts

NO

- I am an impulse buyer
- I don't even open it much less keep it
- I have never received anything that was relevant to me

UNSURE

- It may but I am not aware of it
- Who knows what motivates my purchasing decisions
- I think I get influenced by lots of different things

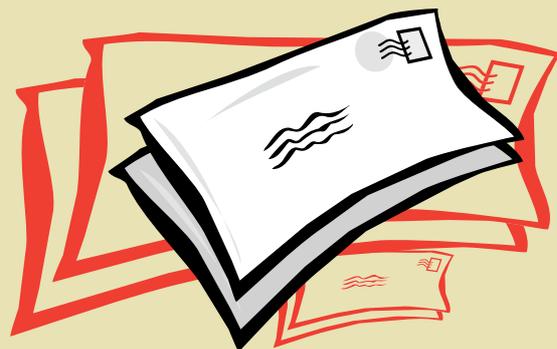
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

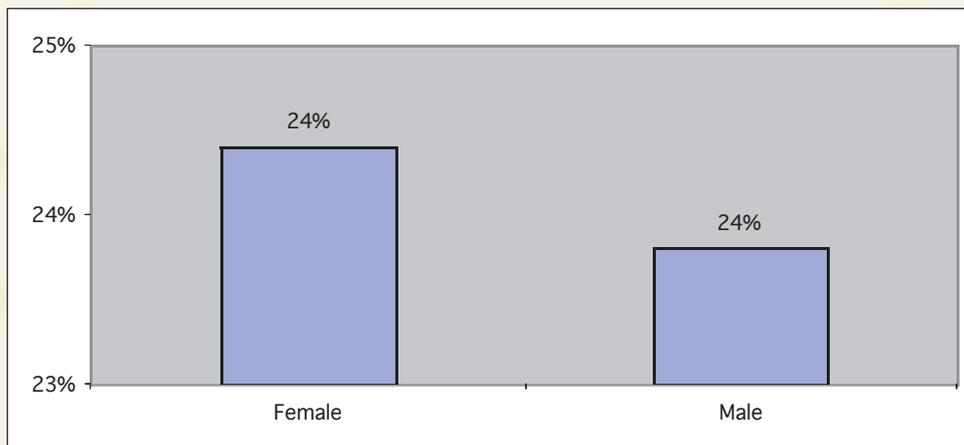
What Percentage of Consumers Purchase as a Result of Receiving Unsolicited Personalised Mail - No Prior Relationship

24% of Consumers say they purchase as a result of receiving Unsolicited Personalised Mail - No Prior Relationship.



Unsolicited Personalised Mail - No Prior Relationship

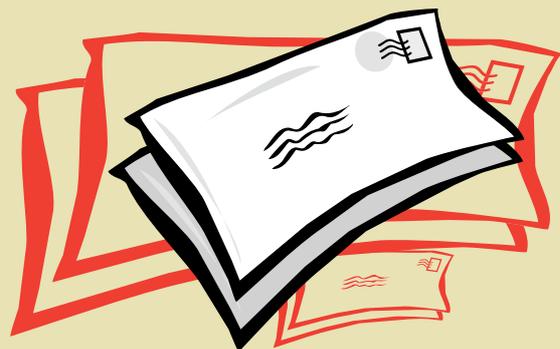
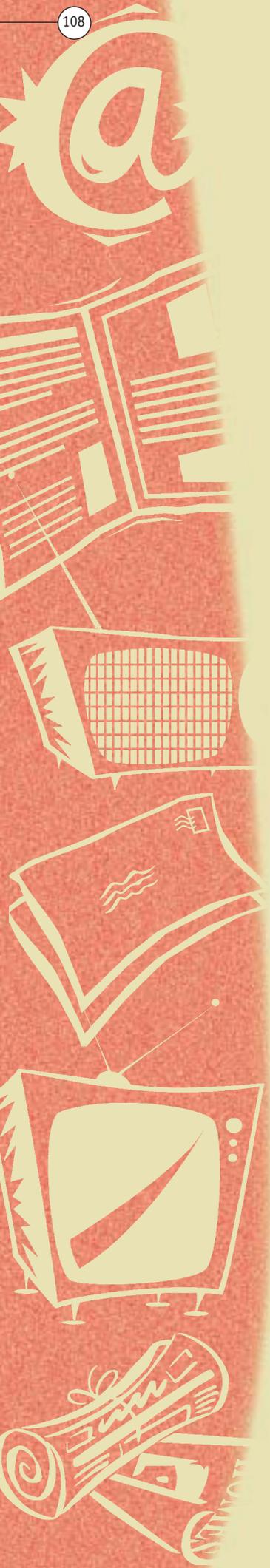
What Percentage of Consumers Purchase as a Result of Receiving It



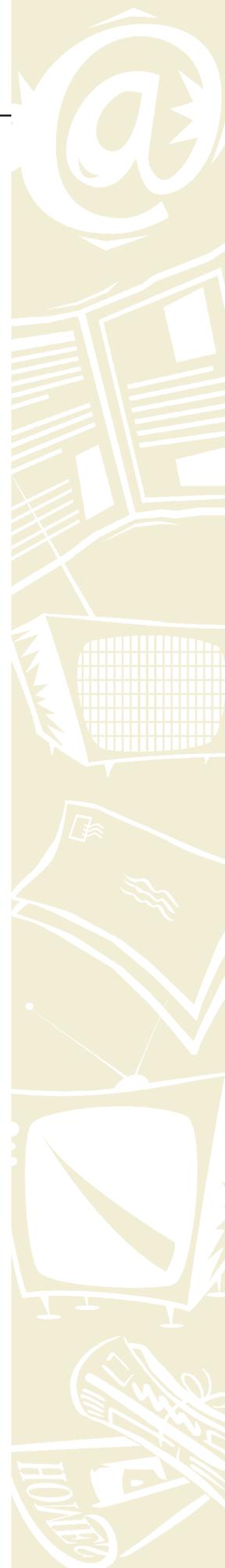
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

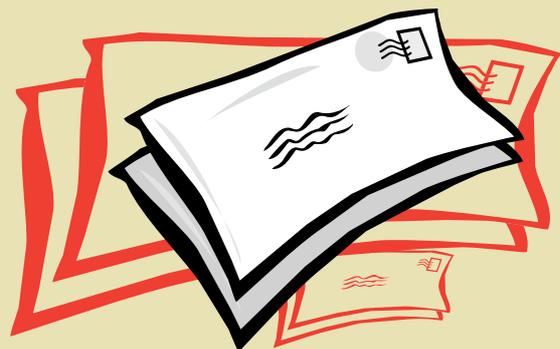
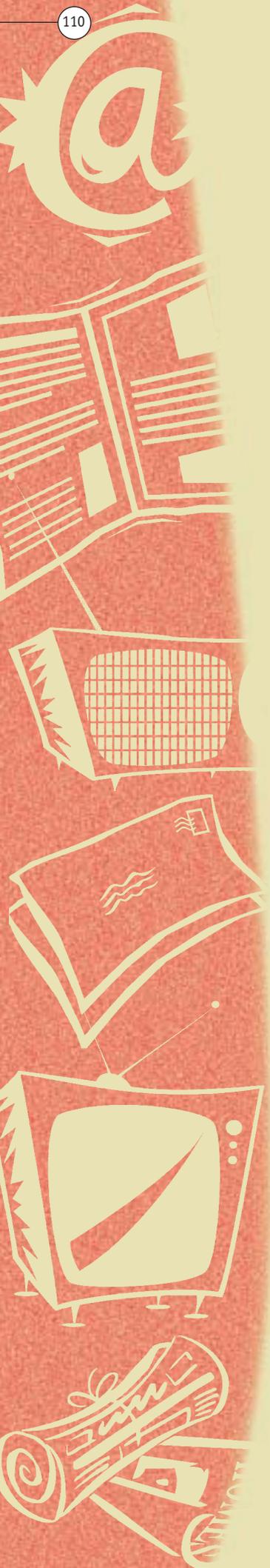
Marketing Media in Australia



Direct Mail Advertising - What Business People Think



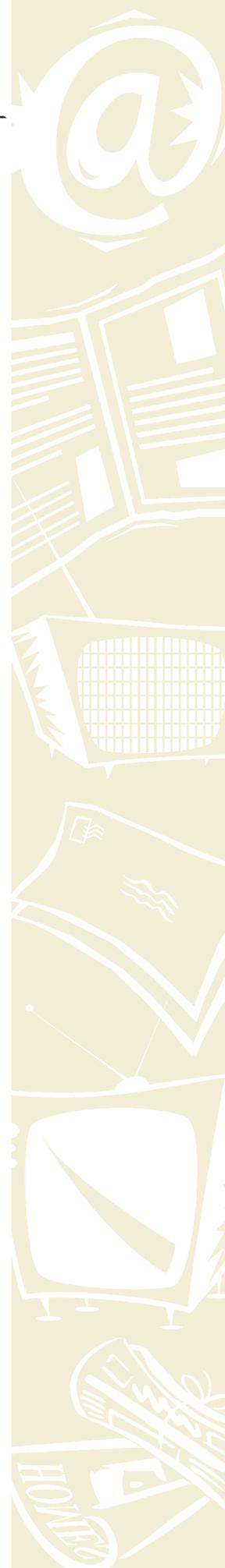
Marketing Media in Australia



Direct Mail Advertising - What Business People Think

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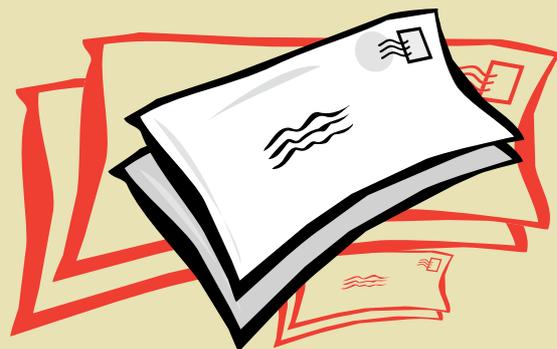


Marketing Media in Australia

Preferred Method of Receiving Information

Direct Mail is the preferred method of receiving information at work by Business Receivers.

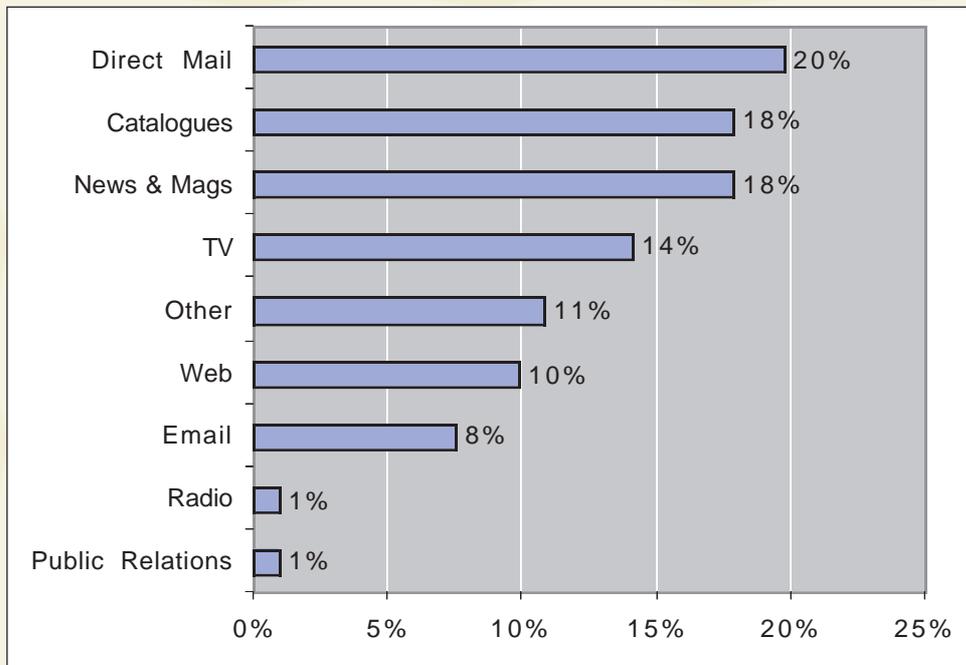
Direct Mail is the preferred method of receiving information at work by Business Senders.



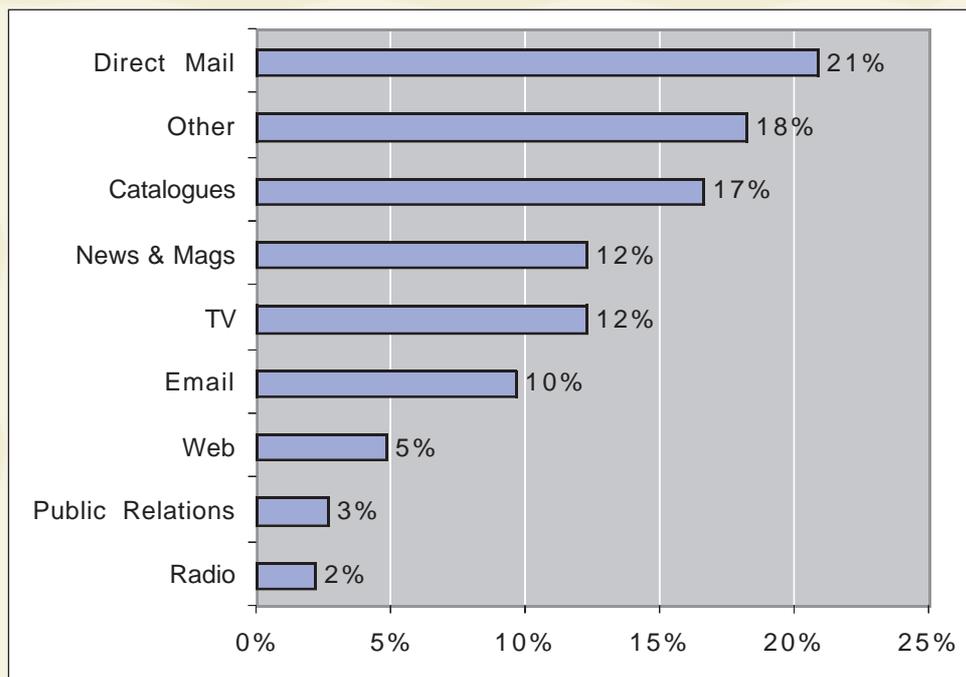
Direct Mail

Preferred Method of Receiving Information

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

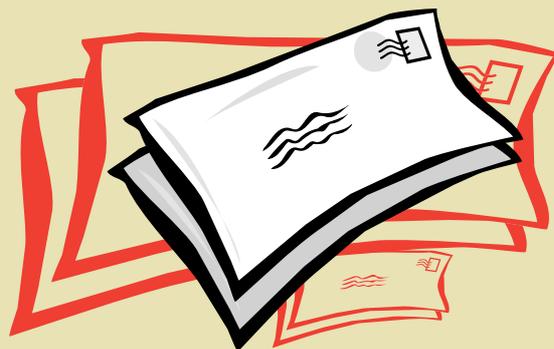
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Do Business People Enjoy Receiving Direct Mail

52% of Business Receivers say they either enjoy or are indifferent to receiving Direct Mail.

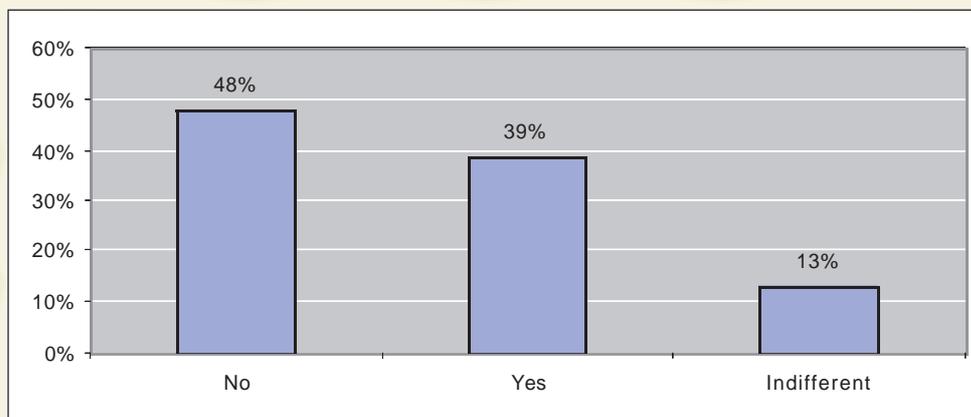
40% of Business Senders say they either enjoy or are indifferent to receiving Direct Mail.



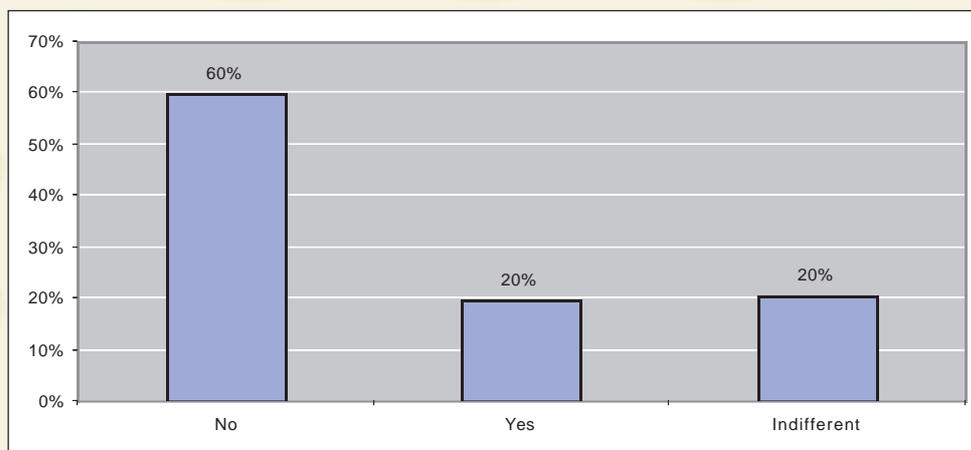
Direct Mail

Do Business People Enjoy Receiving It

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

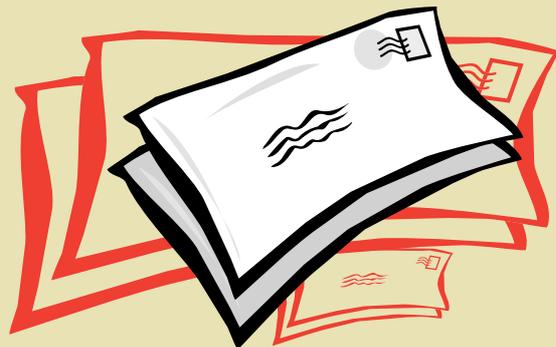
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Major Strengths of Direct Mail

Business Receivers believe that the major strengths of Direct Mail are that it is a targeted, personal, 'in-your-face' media with good reach.

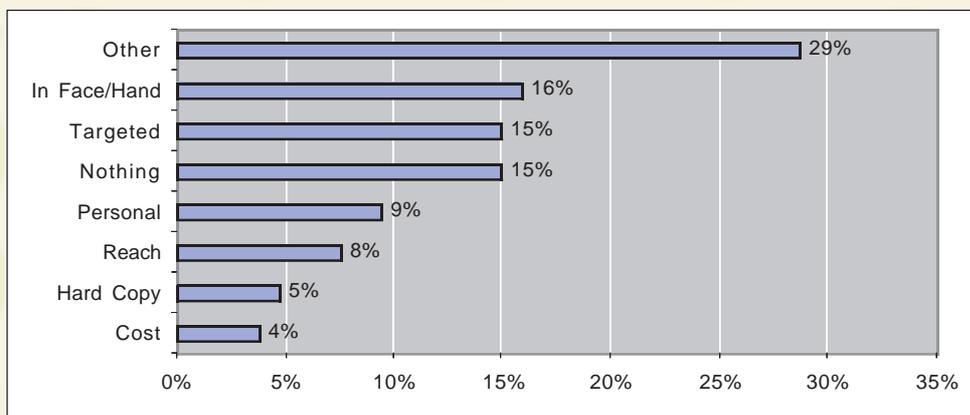
Business Senders believe that the major strengths of Direct Mail are that it is a targeted, cost-effective, 'in-your-face' media with good reach.



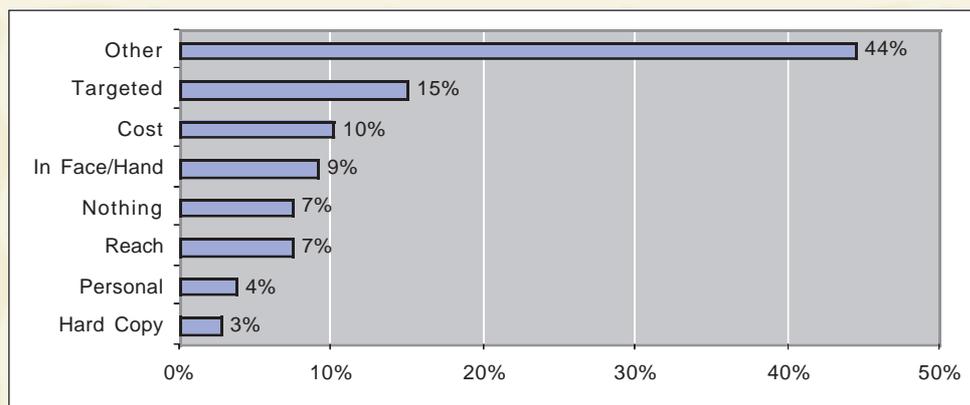
Direct Mail

What Business People Believe to be Its Major Strengths

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

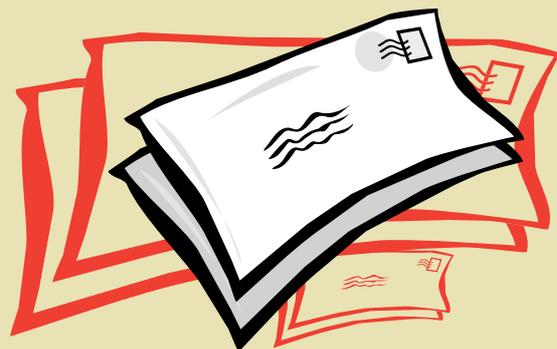
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Major Weaknesses of Direct Mail

Business Receivers nominate a variety of issues they see as weaknesses of Direct Mail.

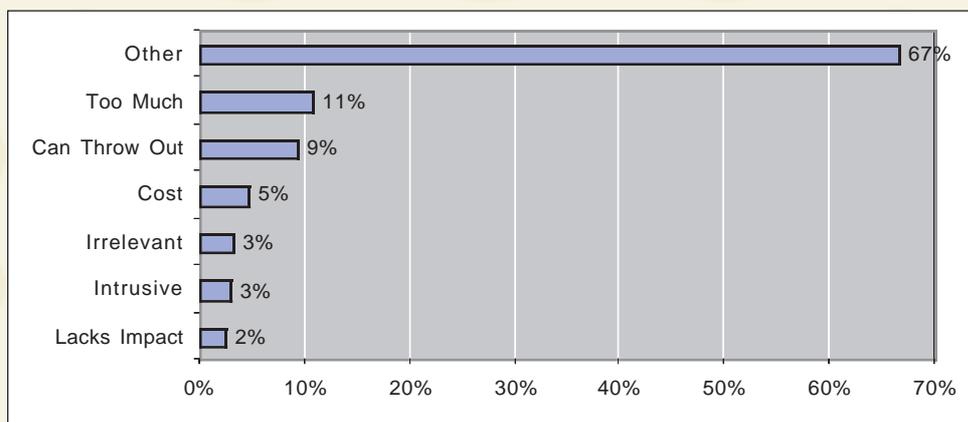
Business Senders nominate a variety of issues they see as weaknesses of Direct Mail.



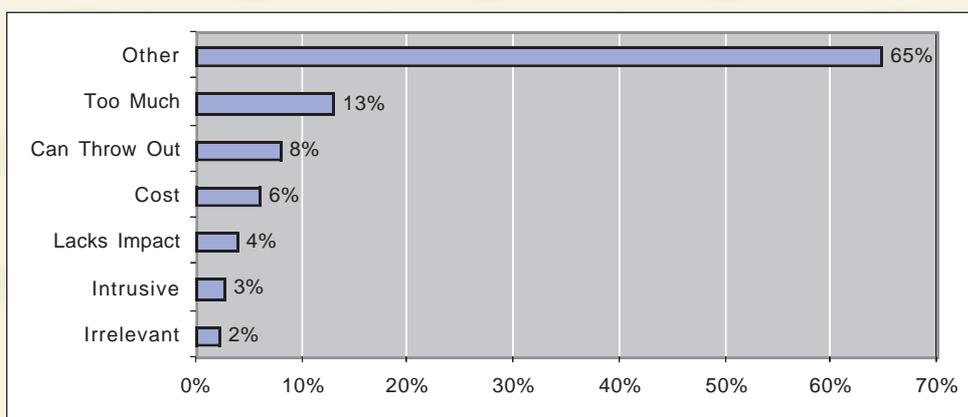
Direct Mail

What Business People Believe to be Its Major Weaknesses

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

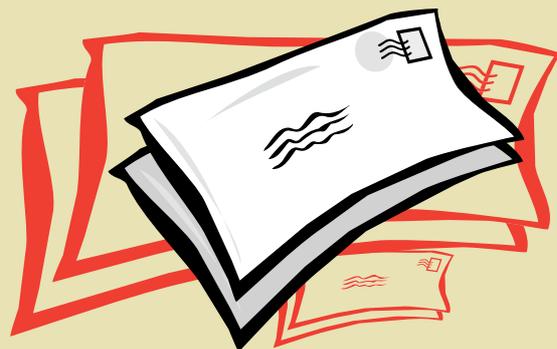
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Cost Effectiveness of Direct Mail

39% of Business Receivers believe that Direct Mail is a cost-effective media.

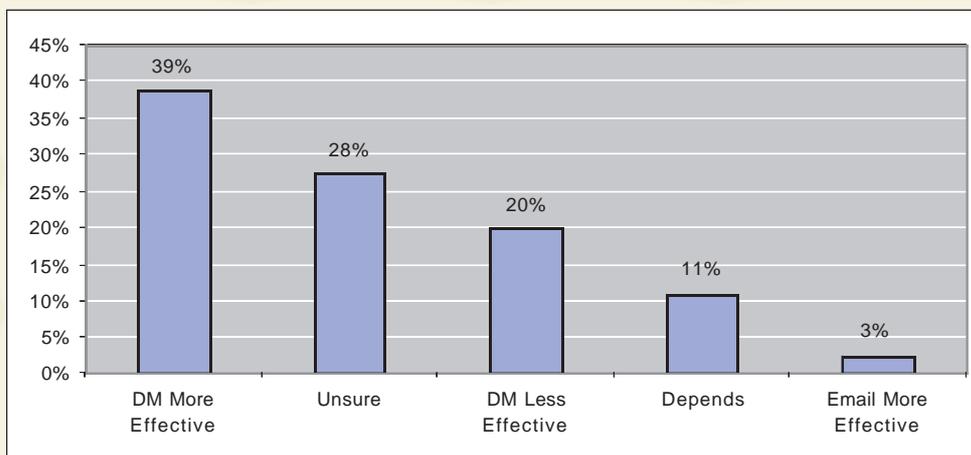
42% of Business Senders believe that Direct Mail is a cost-effective media.



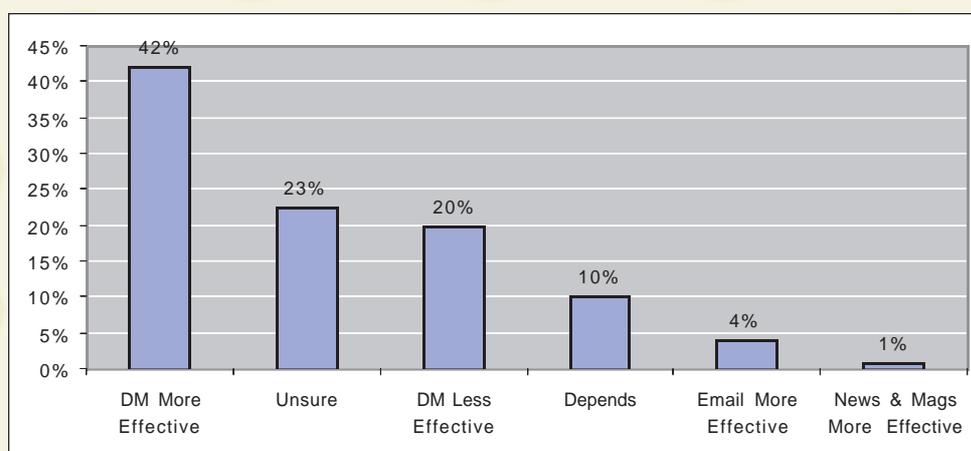
Direct Mail

Do Business People Believe That It is Cost Effective

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

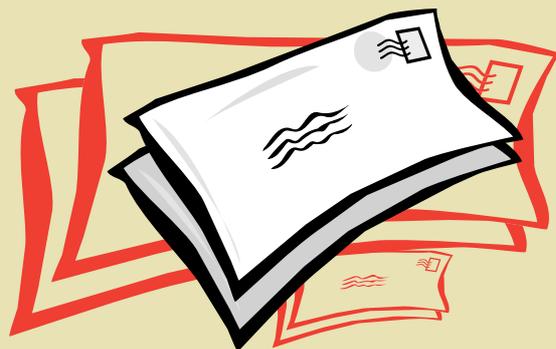
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Do Business People Prefer to Receive an Advertising Email or Direct Mail

58% of Business Receivers prefer to receive Direct Mail compared to an advertising email.

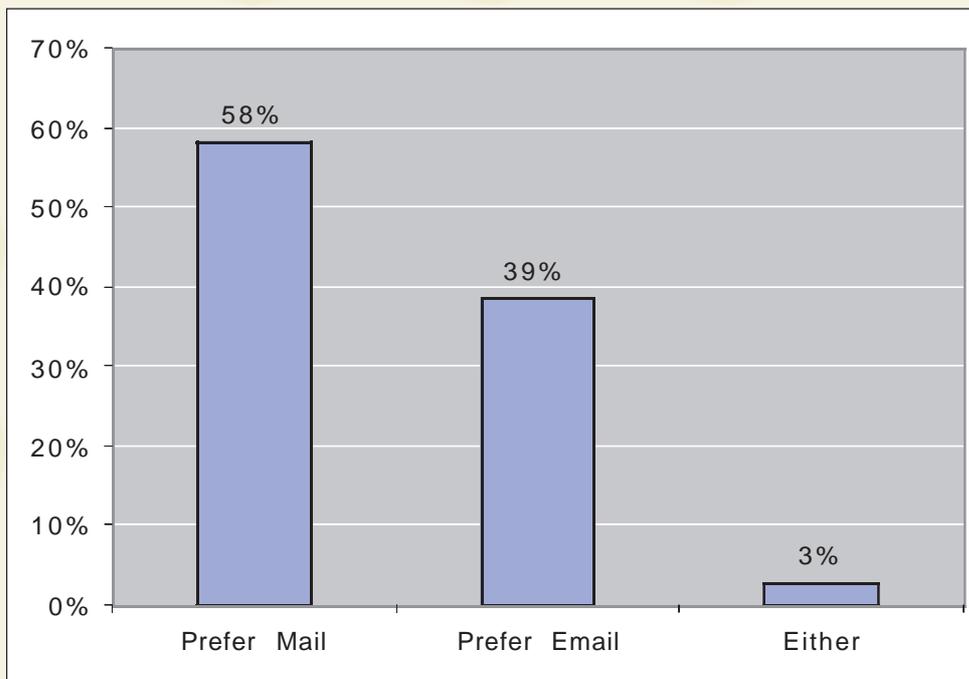
61% of Business Senders prefer to receive Direct Mail compared to an advertising email.



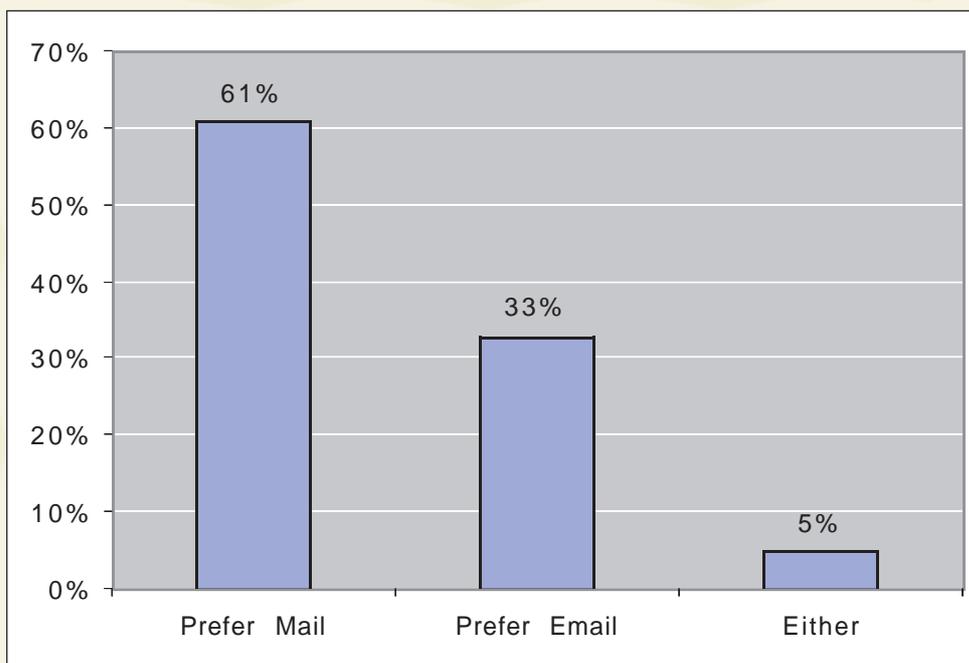
Direct Mail

Do Business People Prefer to Receive an Advertising Email or Direct Mail

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.

Source: ResponseAbility Business Research 2001.

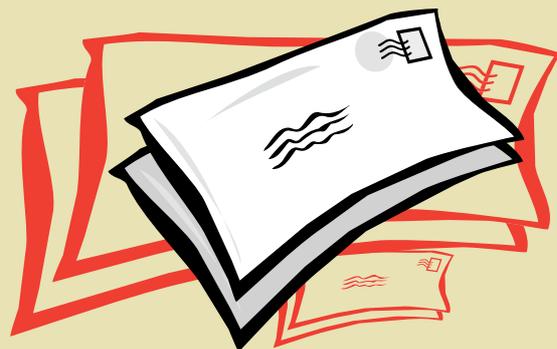
Marketing Media in Australia

Do Business People Prefer to Receive Catalogues via Mail or Internet

74% of Business Receivers prefer to receive a catalogue via Direct Mail.

75% of Business Senders prefer to receive a catalogue via Direct Mail.

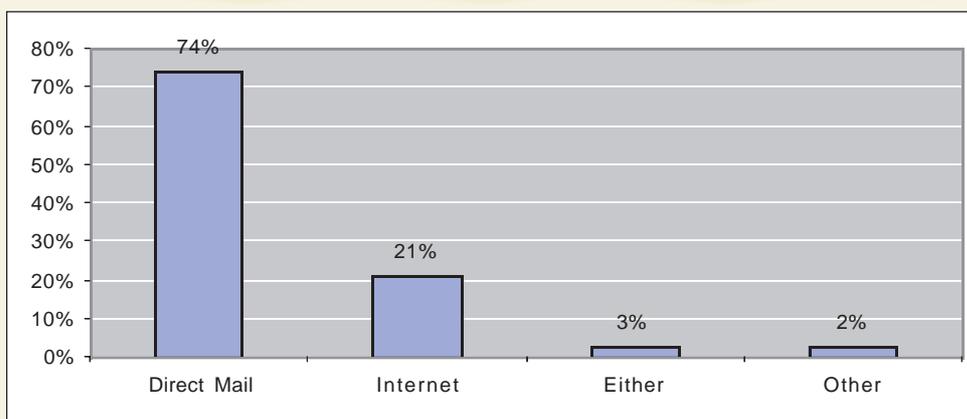
77% of Gatekeepers and Personal Assistants would prefer to receive a catalogue via Direct Mail.



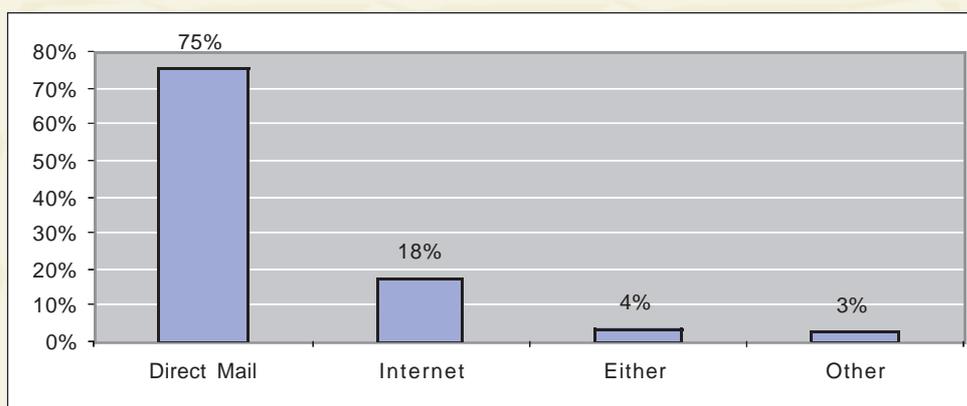
Direct Mail

Do Business People Prefer to Receive Catalogues via Mail or Internet

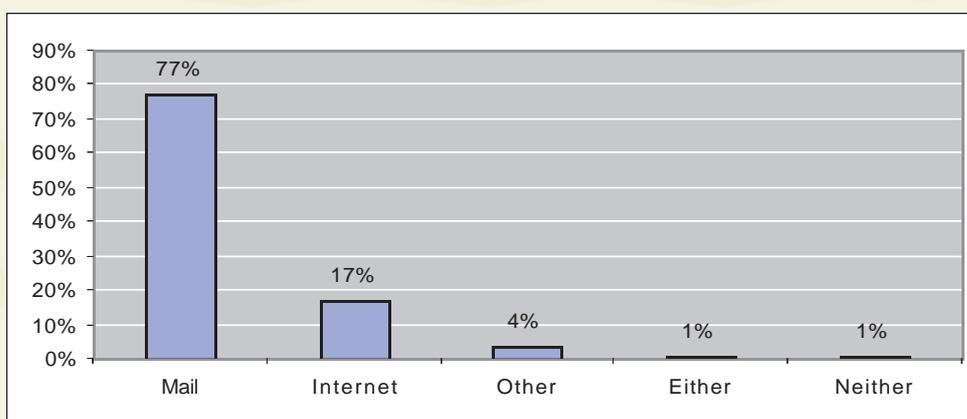
Receivers



Senders



Gatekeepers and Personal Assistants



Base: Graph 1 Sample = 213. Graph 2 Sample = 187. Graph 3 Sample = 100.

Source: ResponseAbility Business Research 2001.

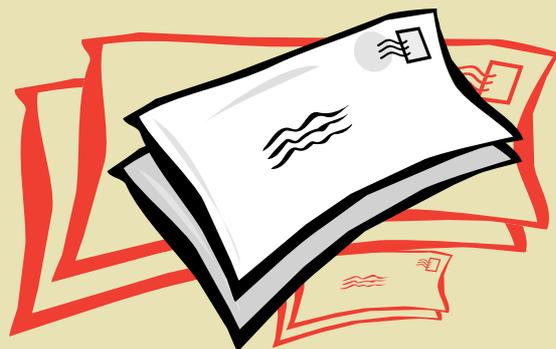
Marketing Media in Australia

How to Increase the Chances of Direct Mail Being Opened

Business Receivers say the best way to increase the chance of them opening Direct Mail is for advertisers to make it clear on the envelope what's inside and to personalise the letter.

Business Senders say the best way to increase the chance of them opening Direct Mail is for advertisers to make it clear on the envelope what's inside and to personalise the letter.

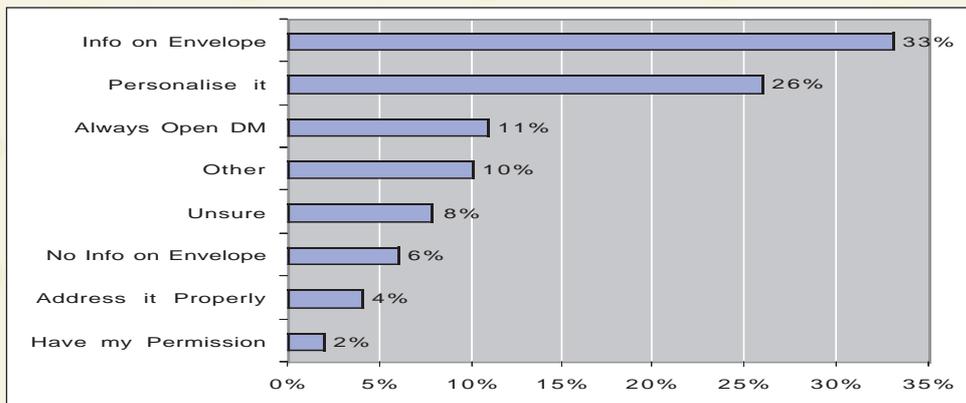
Gatekeepers and Personal Assistants say the best way to increase the chance of them opening Direct Mail is for advertisers to grab their attention, personalise the letter and to have the address details correct.



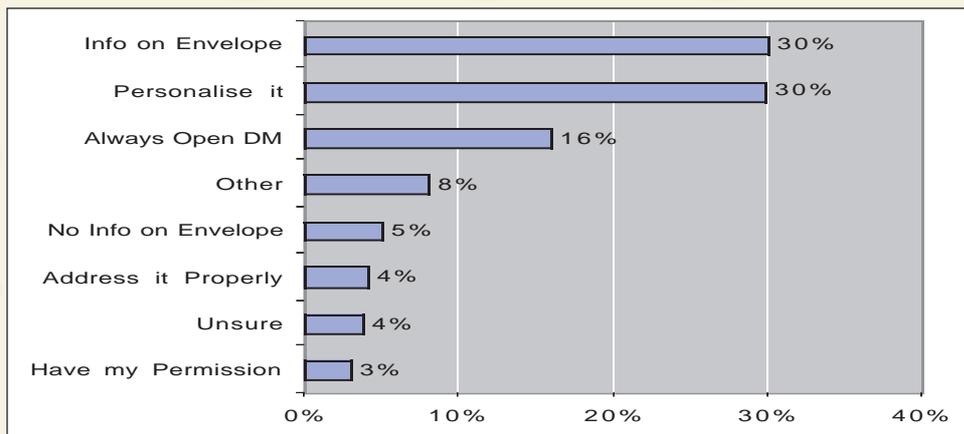
Direct Mail

How to Increase the Chances of Business People Opening It

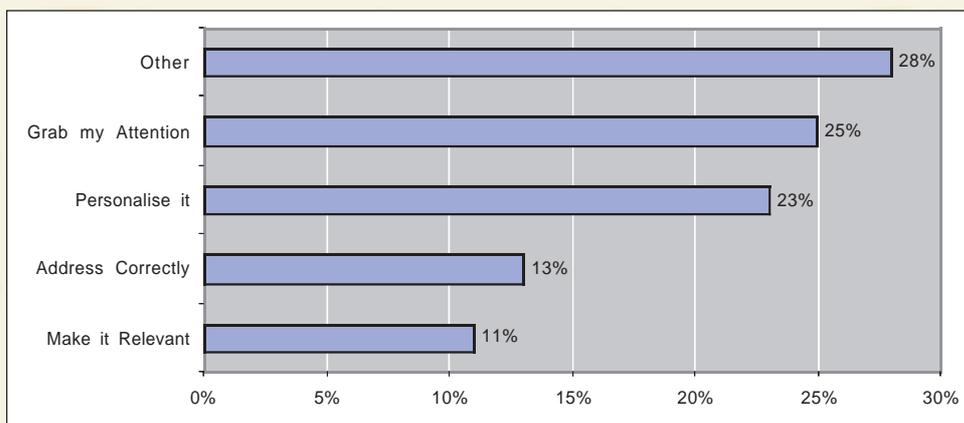
Receivers



Senders



Gatekeepers and Personal Assistants



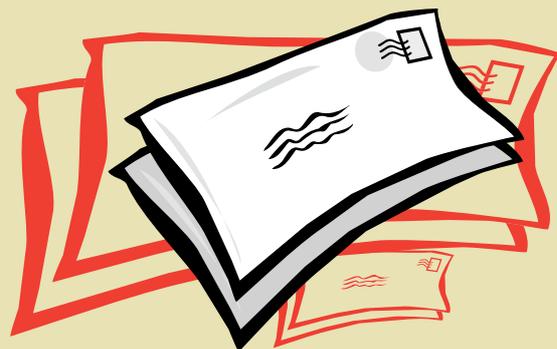
Base: Graph 1 Sample = 213. Graph 2 Sample = 187. Graph 3 Sample = 100.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

How to Increase the Chances of Direct Mail Response

Business Receivers say special offers and having their permission to market to them is the best way to increase the chance of them responding to Direct Mail.

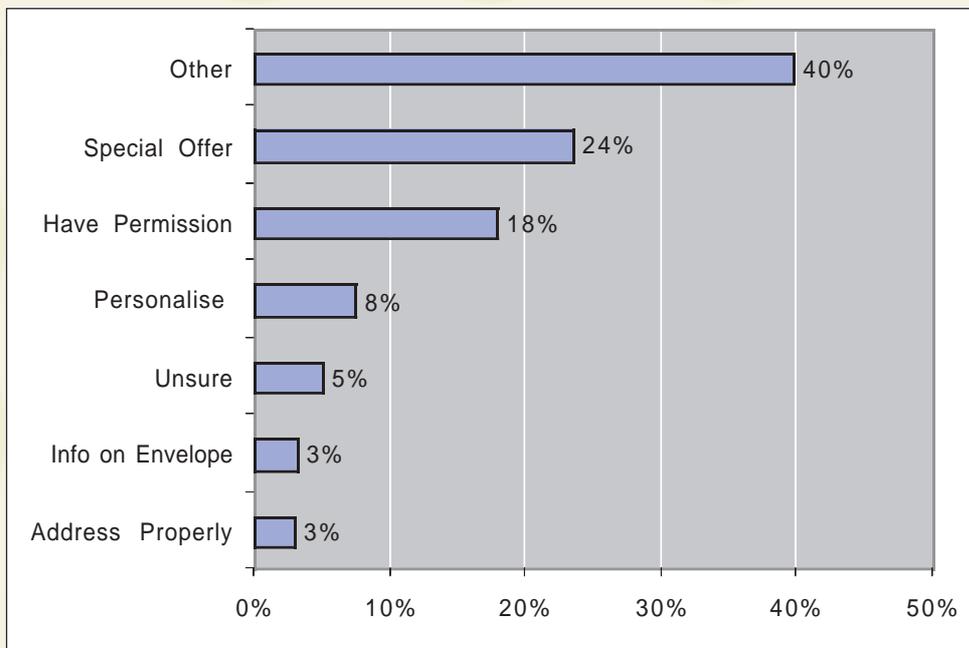
Business Senders say special offers and having their permission to market to them is the best way to increase the chance of them responding to Direct Mail



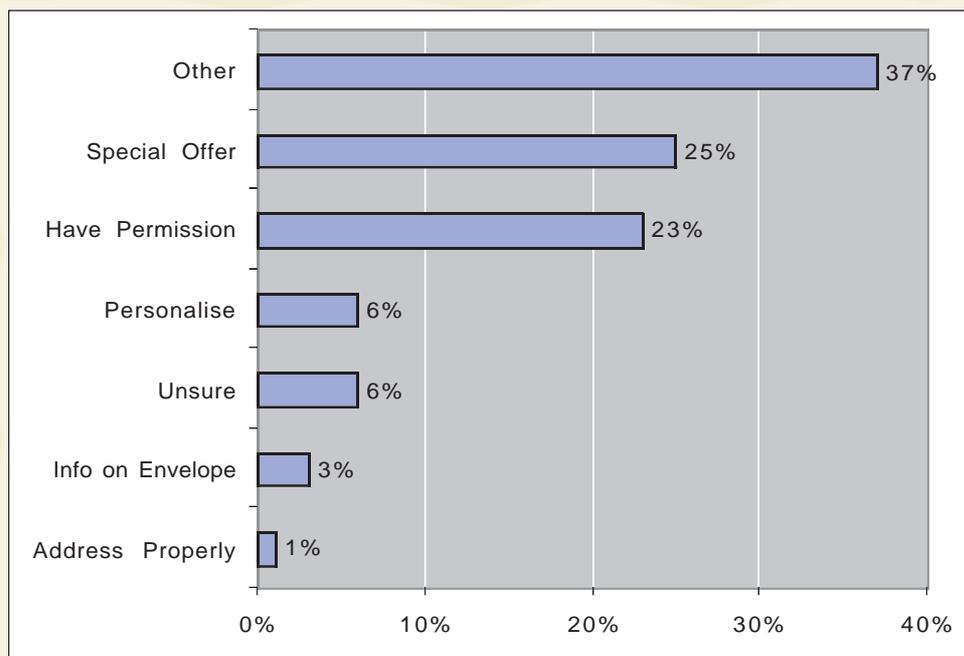
Direct Mail

How To Increase the Chances of Business People Responding

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.
Source: ResponseAbility Business Research 2001.

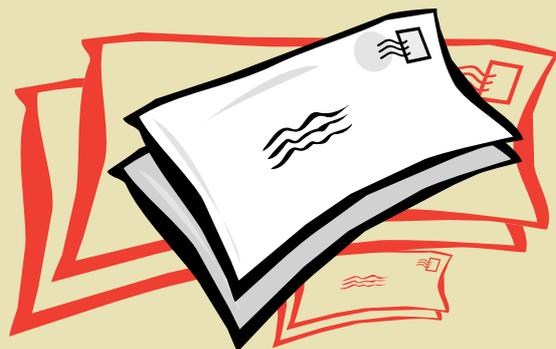
Marketing Media in Australia

Of the Direct Mail Received, What Percentage is Opened and Read by Business People

Business Receivers say they open and read 90% of the Direct Mail they receive.

Business Senders say they open and read 84% of the Direct Mail they receive.

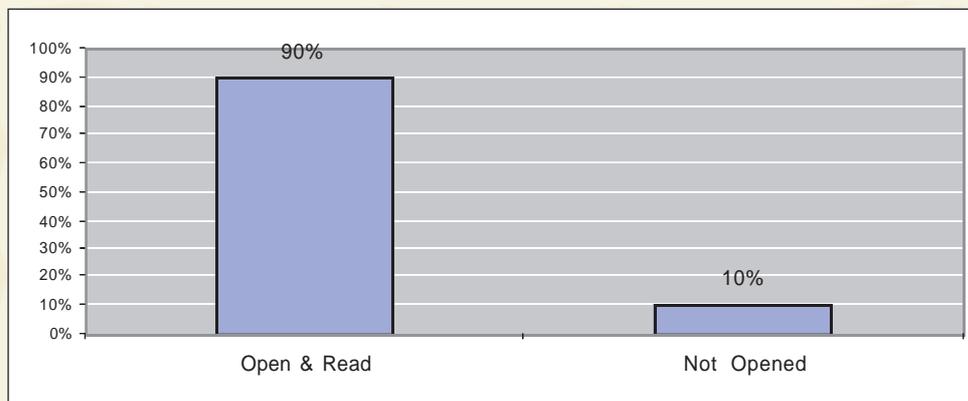
Gatekeepers and Personal Assistants say that they open and read 92% of the Direct Mail they receive.



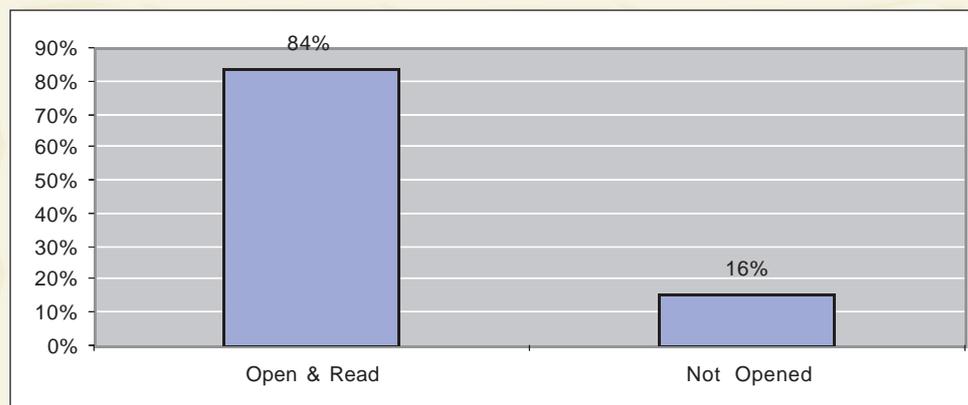
Direct Mail

What Percentage is Opened and Read by Business People

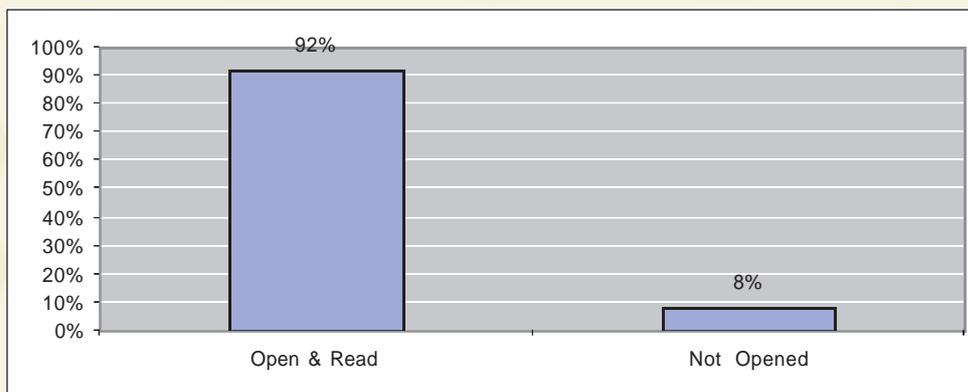
Receivers



Senders



Gatekeepers and Personal Assistants



Base: Graph 1 Sample = 213. Graph 2 Sample = 187. Graph 3 Sample = 100.
Source: ResponseAbility Business Research 2001.

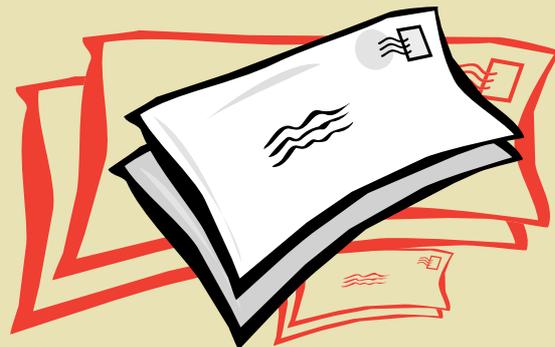
Marketing Media in Australia

Why Some Direct Mail Is Not Opened

The 10% of Business Receivers who do not open 100% of the Direct Mail they receive say that irrelevance and the fact that they know what it is without opening the mail are the main reasons they don't open all mail.

The 16% of Business Senders who do not open 100% of the Direct Mail they receive say that irrelevance and the fact that they know what it is without opening the mail are the main reasons they don't open all mail.

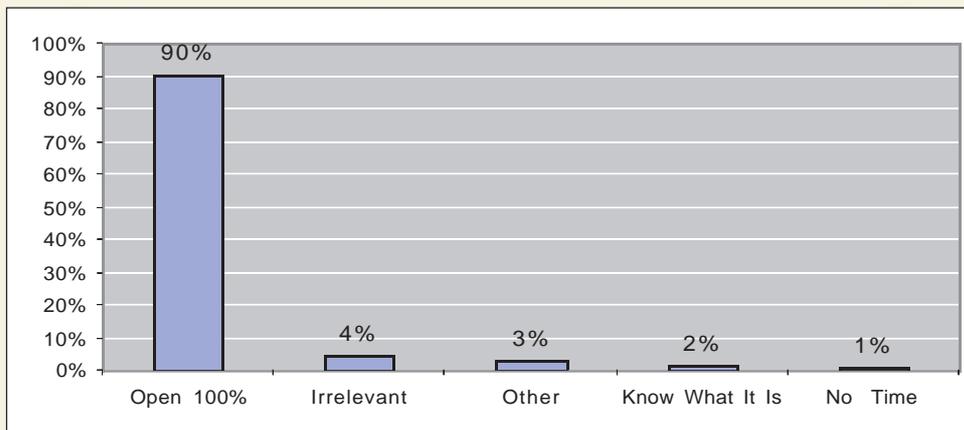
The 10% of Gatekeepers and Personal Assistants who do not open 100% of the Direct Mail they receive say that irrelevance and the fact that some mail is incorrectly addressed are the main reasons they don't open all mail.



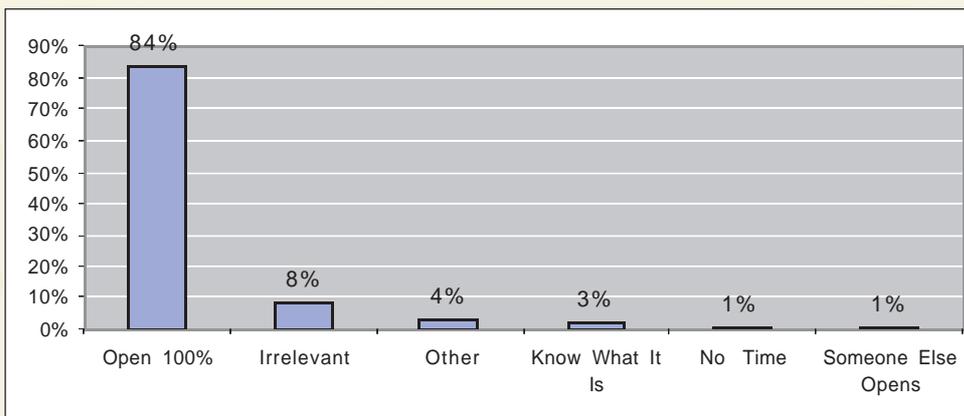
Direct Mail

Why Some Business People Don't Open It

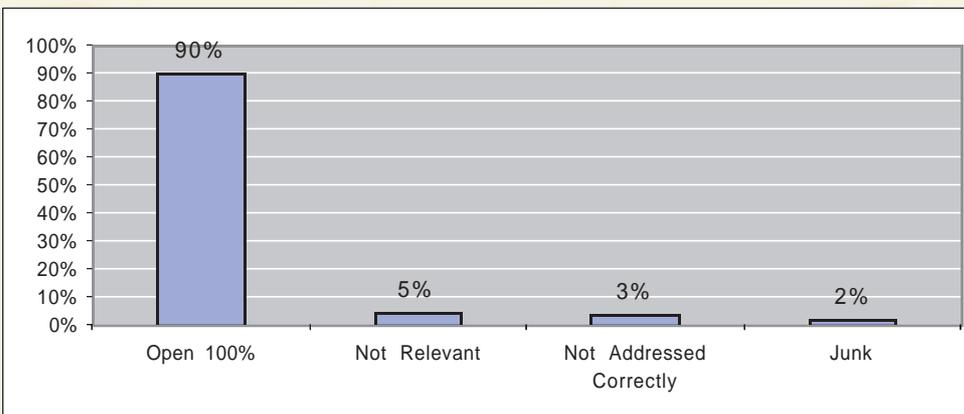
Receivers



Senders



Gatekeepers and Personal Assistants



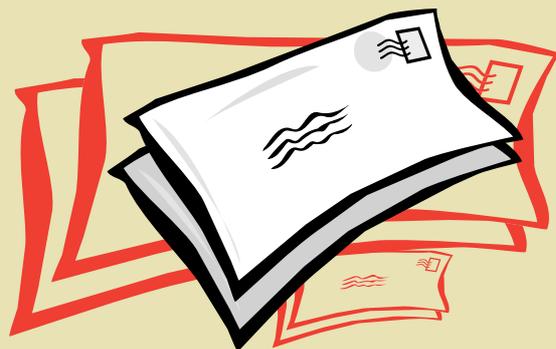
Base: Graph 1 Sample = 213. Graph 2 Sample = 187. Graph 3 Sample = 100.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

What Percentage of Business People Respond To Direct Mail

73% of Business Receivers say they respond as a consequence of receiving Direct Mail.

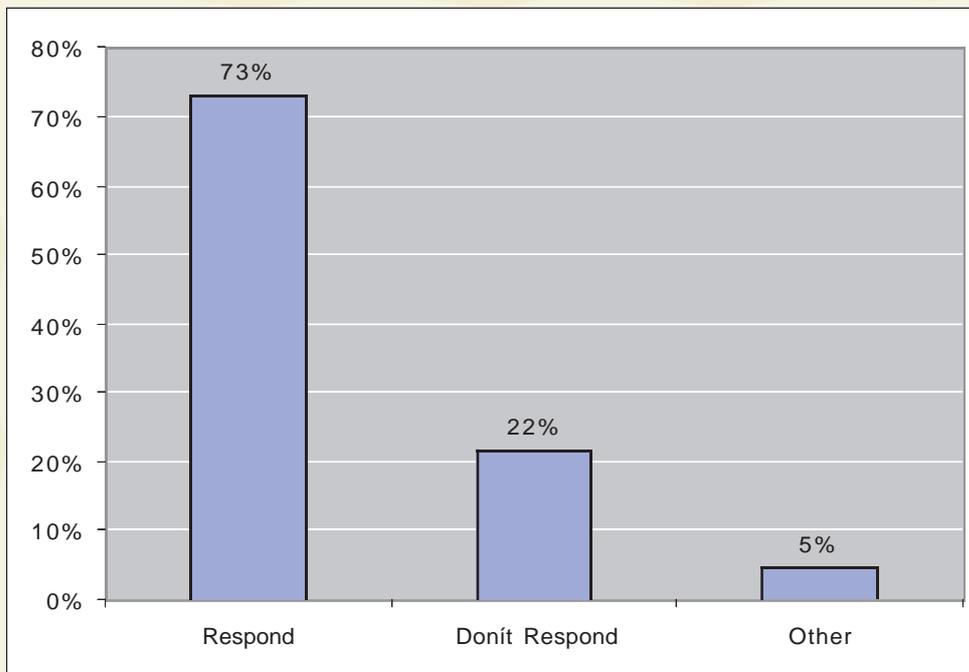
78% of Business Senders say they respond as a consequence of receiving Direct Mail.



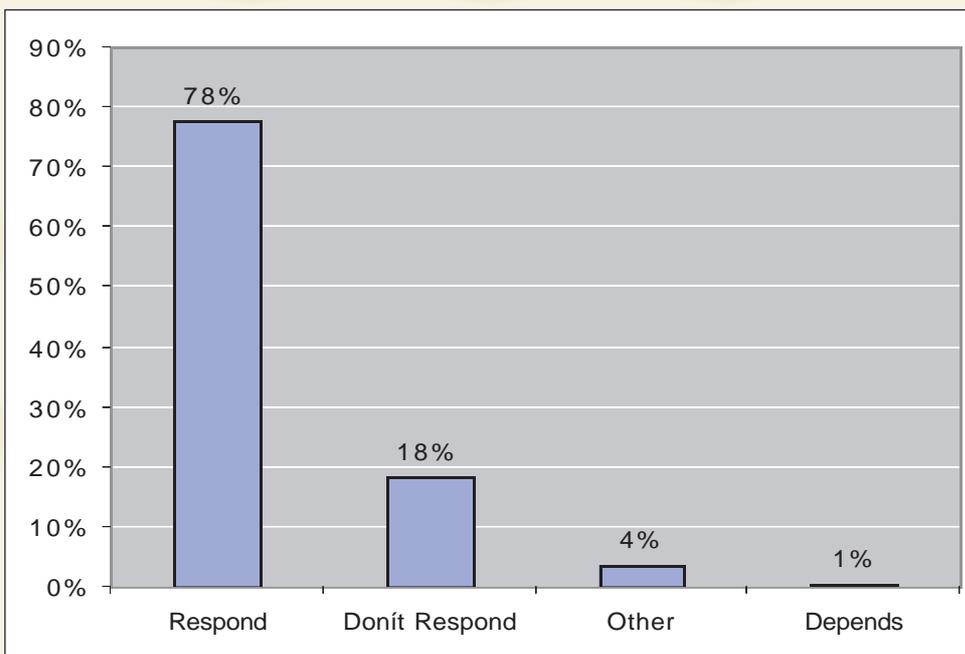
Direct Mail

What Percentage Respond as a Result of Receiving It

Receivers



Senders



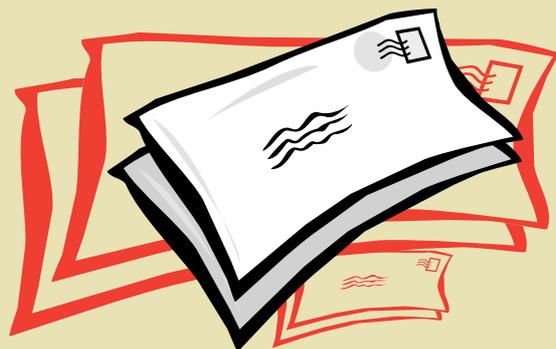
Base: Graph 1 Sample = 213. Graph 2 Sample = 187.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

What Motivates Business People to Respond to Direct Mail

Business Receivers say having a need for a product/service is the most significant motivator for them to respond to Direct Mail.

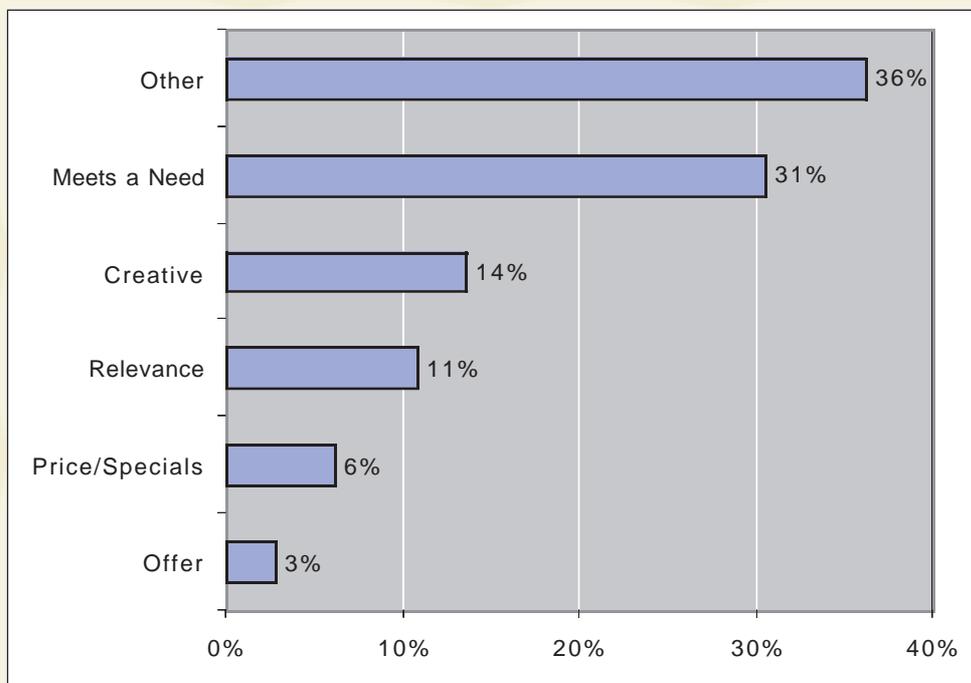
Business Senders say having a need for a product/service is the most significant motivator for them to respond to Direct Mail.



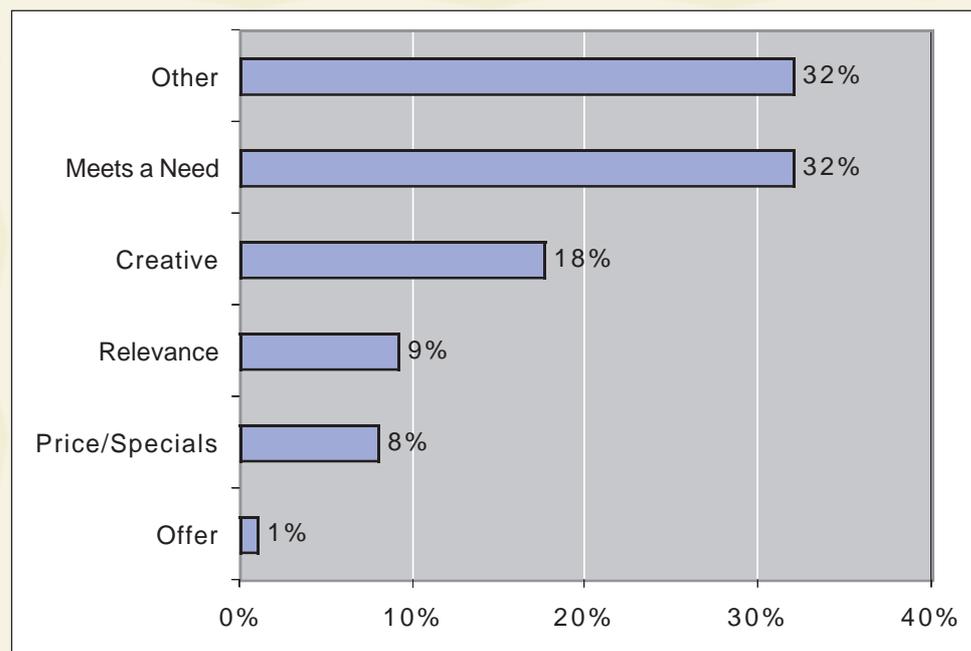
Direct Mail

What Motivates Business People to Respond to It

Receivers



Senders



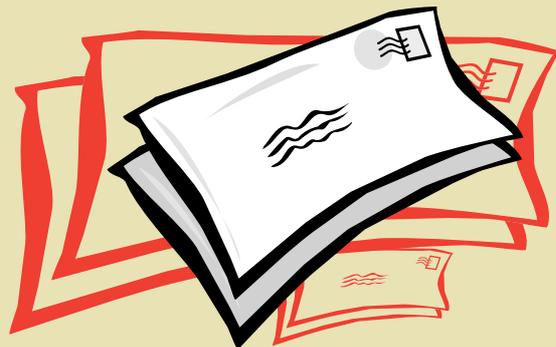
Base: Graph 1 Sample = 213. Graph 2 Sample = 187.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

The Future of Business-to-Business Direct Mail

68% of Business Receivers believe the use of Business-to-Business (B2B) Direct Mail will increase or stay the same in the future.

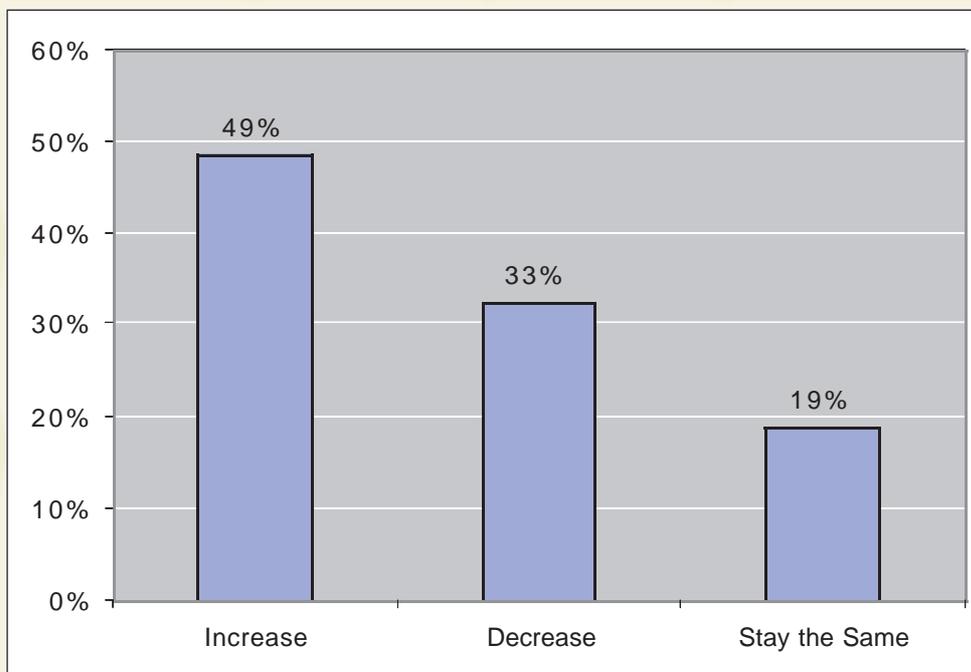
69% of Business Senders believe the use of B2B Direct Mail will increase or stay the same in the future.



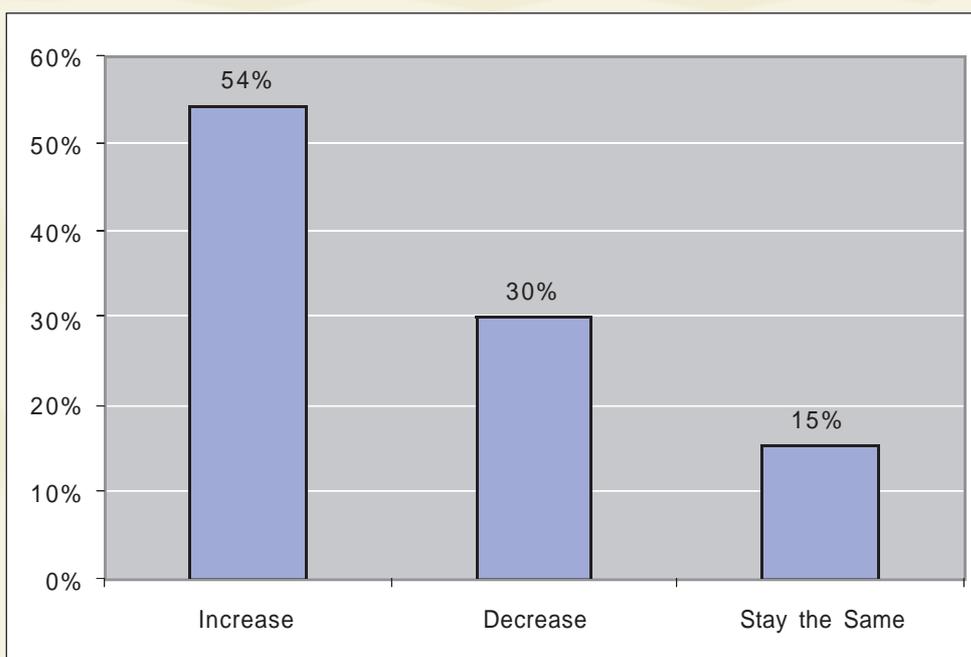
Direct Mail

The Future of Business-to-Business Direct Mail as Viewed by Business People

Receivers



Senders



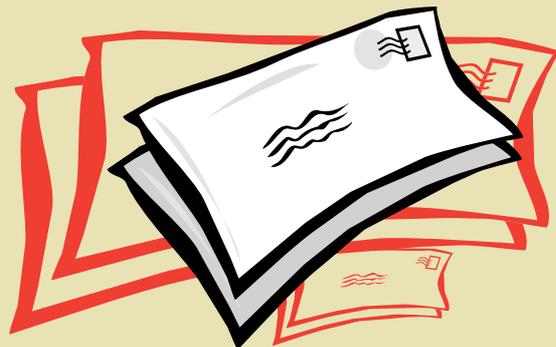
Base: Graph 1 Sample = 213. Graph 2 Sample = 187.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Planned Usage of Direct Mail in the Next 12 Months

67% of Business Receivers say their usage of Direct Mail will increase or stay the same in the next 12 months.

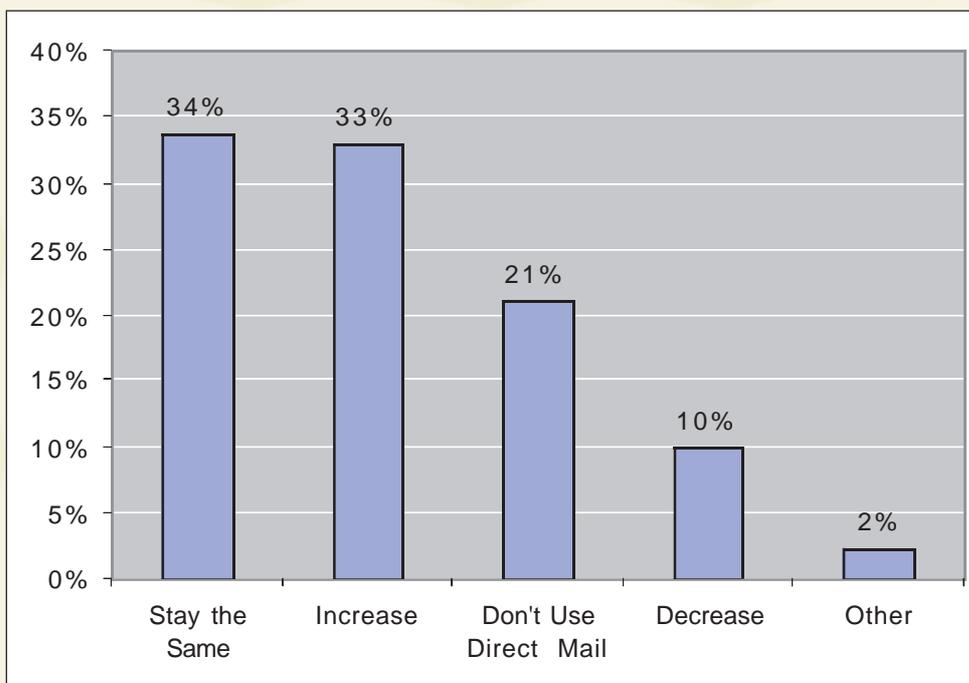
67% of Business Senders say their usage of Direct Mail will increase or stay the same in the next 12 months.



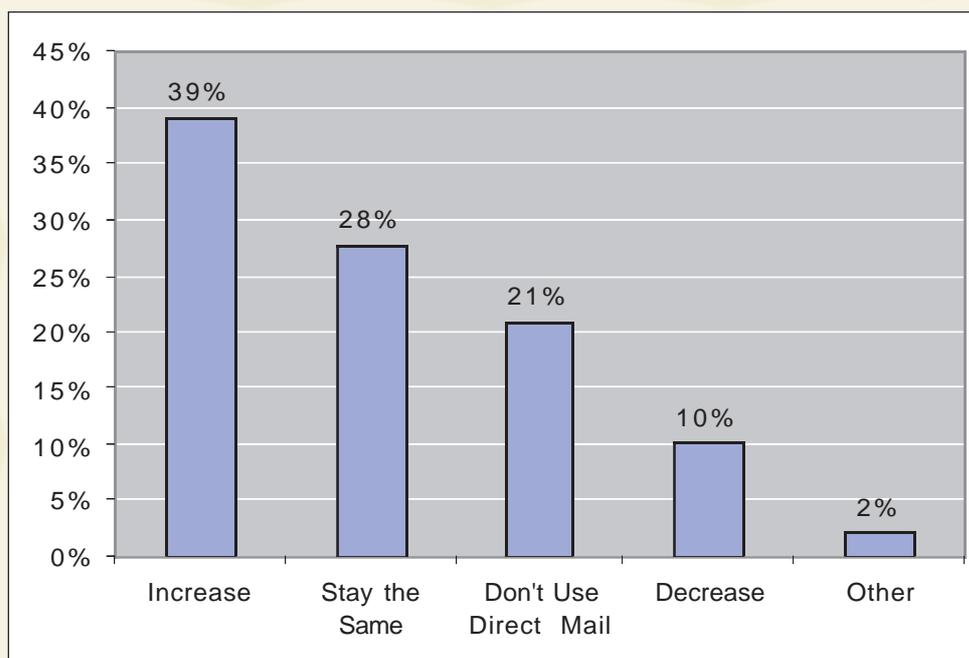
Direct Mail

Planned Usage in the Next 12 Months

Receivers



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.
Source: ResponseAbility Business Research 2001.

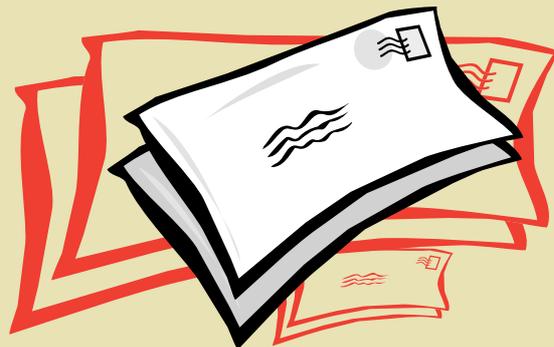
Marketing Media in Australia

What Advertisers Can Do to Ensure Direct Mail is Passed On to the Boss and of the Direct Mail Received, What Percentage is Passed on

Gatekeepers and Personal Assistants believe the best way to ensure Direct Mail material is passed to their boss is to grab their attention, to correctly and personally address the material and to make it relevant.

Gatekeepers and Personal Assistants believe the best way to ensure advertising material is not passed to their bosses is to make it irrelevant, to send too much of it, to address it incorrectly and to send it by fax.

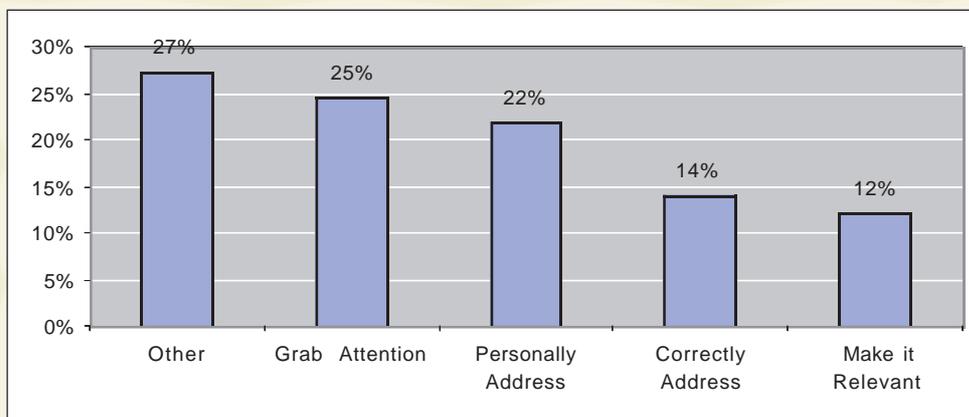
33% of Gatekeepers and Personal Assistants say they pass on 100% of the Direct Mail they receive to their boss.



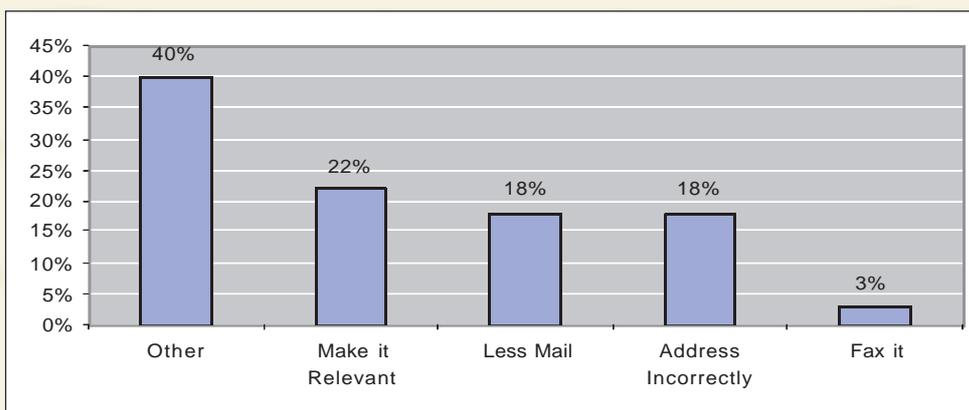
Direct Mail

Gatekeepers and Personal Assistants

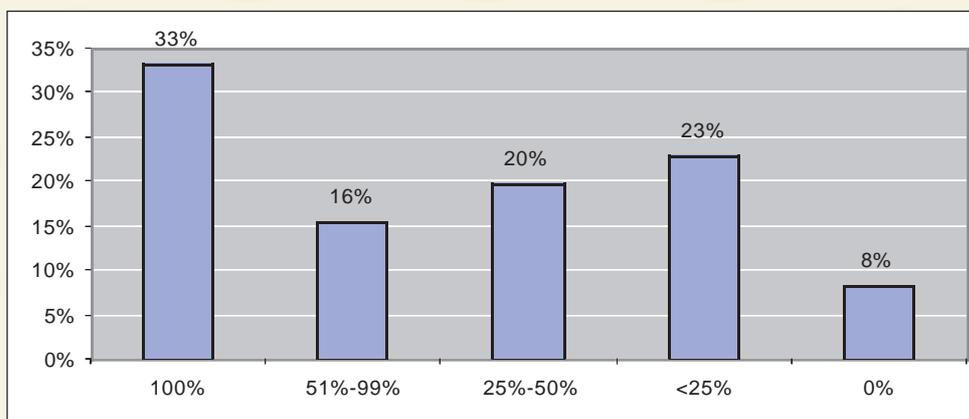
What Advertisers can do to Ensure Direct Mail is Passed On to the Boss



What Advertisers can do to Ensure Direct Mail is not Passed On



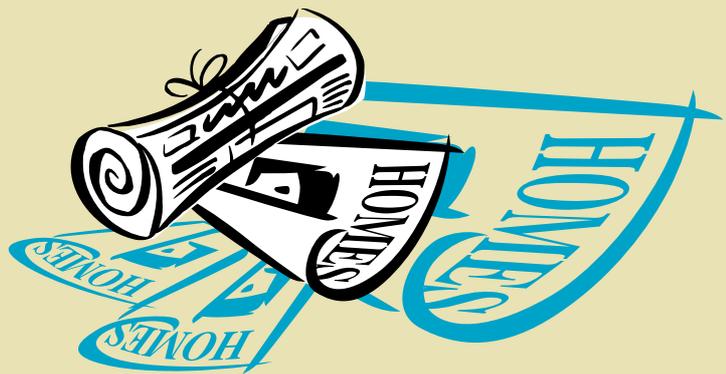
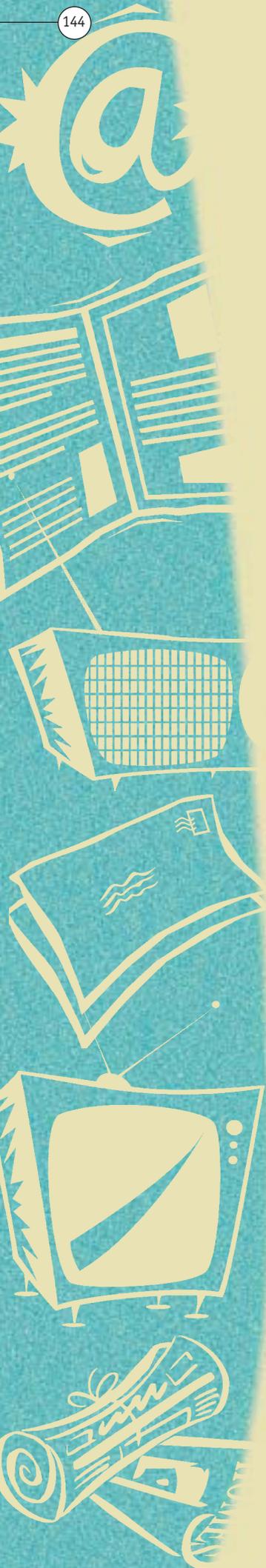
Of Direct Mail Received, What Percentage is Passed On



Base: Sample = 100.

Source: ResponseAbility Business Research 2001.

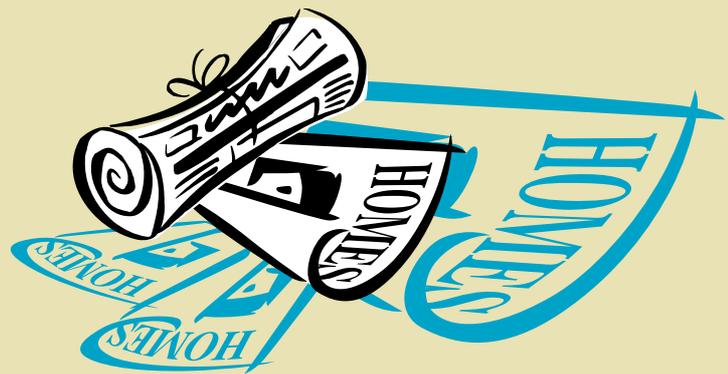
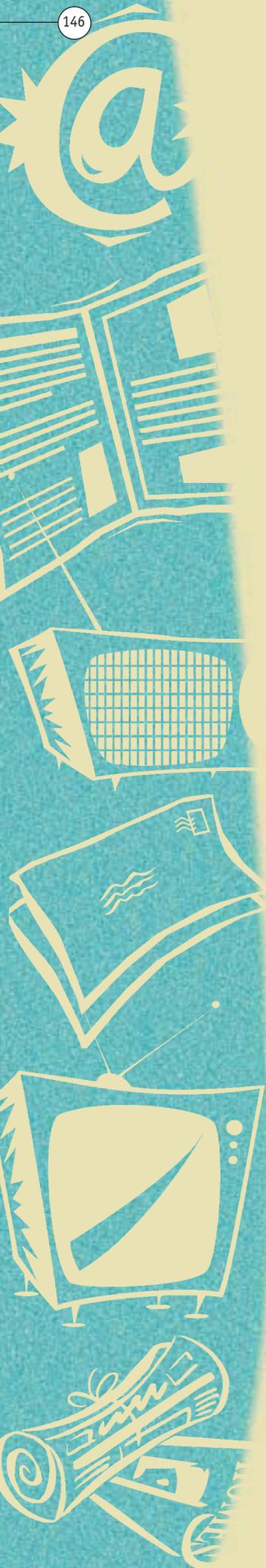
Marketing Media in Australia



Unaddressed Advertising Mail



Marketing Media in Australia



Unaddressed Advertising Mail (UAM) – An Overview

Consumers

74% of Consumers enjoy or are indifferent to receiving UAM

77% of Consumers can nominate an element of UAM that they like

67% of Consumers can nominate an element of UAM that they don't like

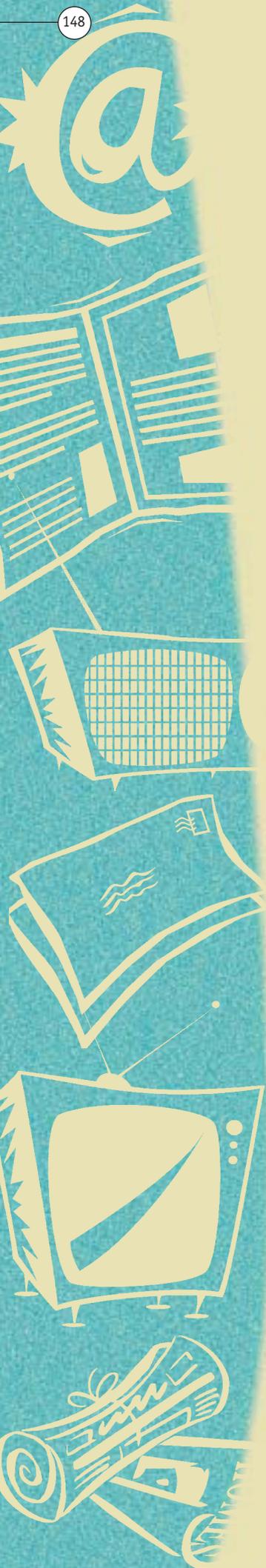
58% of Consumers say that receiving UAM influences their buying decisions

63% of UAM received are opened and read by Consumers

55% of Consumers say they purchase as a result of receiving UAM



Marketing Media in Australia

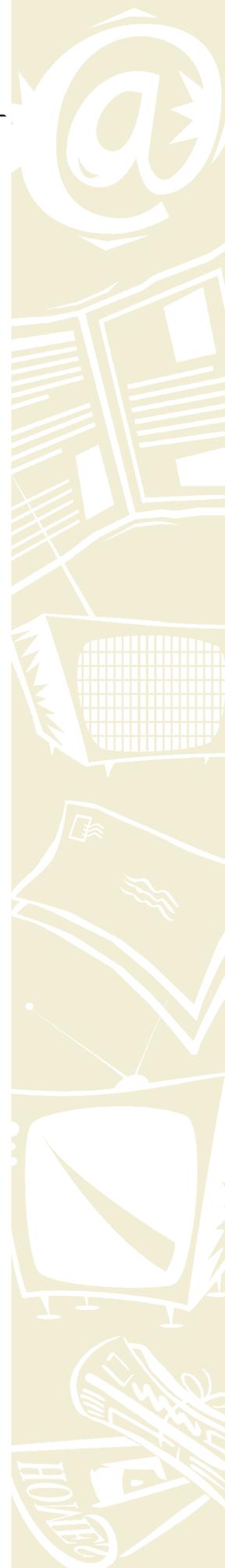


Unaddressed Advertising Mail

What Consumers Think

Contents

● Do Consumers Enjoy Receiving Unaddressed Advertising Mail	151
● What Consumers Like About Receiving Unaddressed Advertising Mail	153
● What Consumers Don't Like About Receiving Unaddressed Advertising Mail	155
● Does Receiving Unaddressed Advertising Mail Influence the Buying Decision	157
● What Percentage of Unaddressed Advertising Mail Items are Opened and Read	159
● What Percentage of Consumers Purchase as a Result of Receiving UAM	161



Marketing Media in Australia

Do Consumers Enjoy Receiving Unaddressed Advertising Mail

74% of Consumers either enjoy or are indifferent to receiving Unaddressed Advertising Mail.

There appears to be little difference in the attitudes of male and female Consumers in regard to enjoying receiving Unaddressed Advertising Mail.

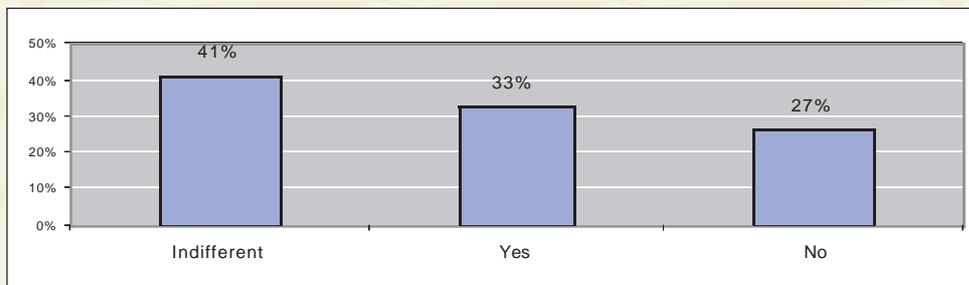
The 25-34 age bracket most enjoys receiving Unaddressed Advertising Mail.

The \$30-39K household income bracket most enjoys receiving Unaddressed Advertising Mail.

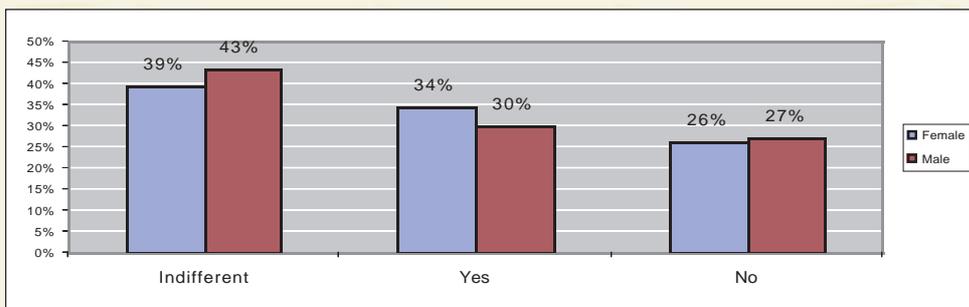


Unaddressed Advertising Mail

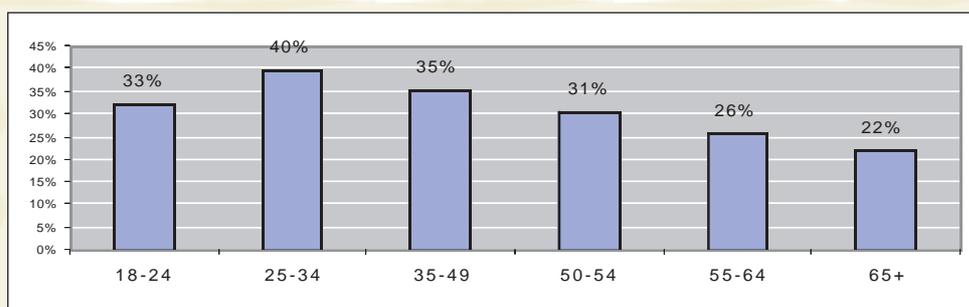
Do Consumers Enjoy Receiving It



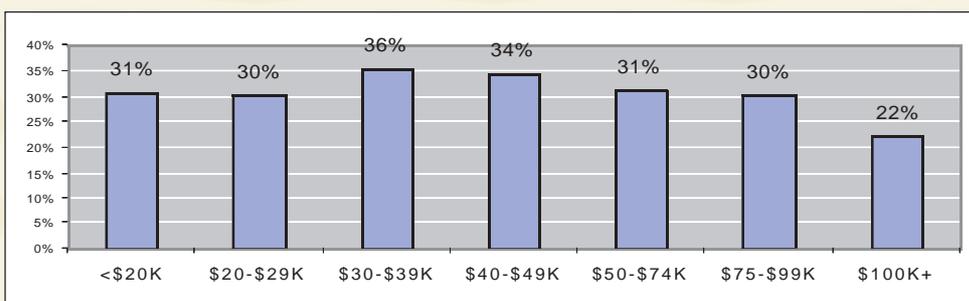
By Sex



Yes - By Age



Yes - By Household Income



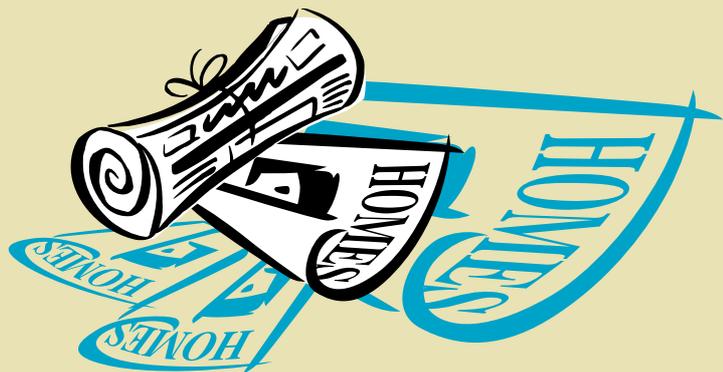
Base: Graph 1&2 Sample = 1,100. Graph 3&4 Sample = 365.
 Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Like About Receiving Unaddressed Advertising Mail

77% of Consumers can nominate an element of receiving Unaddressed Advertising Mail that they like.

The main reasons those Consumers like receiving Unaddressed Advertising Mail are that it provides useful local information, provides information about specials and sales, introduces variety into the shopping experience and is considered less intrusive than other media.



Unaddressed Advertising Mail

What Consumers Like About Receiving It

APPEAL	COMMENTS	%
Other	Sometimes there is something I might like Lets me know what's going on locally Cuts down on my shopping time It's very relevant	27
Nothing	Makes the street look very unclean Clogs up the letterbox Clogs up the drains Waste of paper	23
Information	See what's available without leaving home Interesting information about products Something to compare prices with Tells you what's going on locally	22
Specials	Helpful to review prices and make savings Like bonus coupons and weekly specials See where the bargains are Local offers	17
Variety	I like little offers and local fliers Informs me of local activities Adds variety to shopping Variety for weekly shopping	7
Non Intrusive	Prefer to personal mail from those I don't know Get information without pressure It's there when you need it Least intrusive media	4

Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Don't Like About Receiving Unaddressed Advertising Mail

67% of Consumers can nominate an element of receiving Unaddressed Advertising Mail that they do not like.

The main reasons that those Consumers dislike receiving Unaddressed Advertising Mail relate to wastage of paper, letterbox clutter, the perception that there is too much and that the information is irrelevant. There are some concerns about the mess Unaddressed Advertising Mail is seen to create.



Unaddressed Advertising Mail

What Consumers Don't Like About It

DISLIKE	COMMENTS	%
Nothing	Nothing unless we go away Nothing - find them all useful I like getting them No dislikes	33
Other	People can tell from letterbox that we are away Invasion of privacy in a minor way Supermarket catalogues Repetitious	25
Waste	Waste of paper and clogs up letterbox Waste of time and resources Waste and did not ask for it Bad for our forests	17
Too Much	Too much of it and it fills up letterbox Too much and rubbishes street Too many at Christmas time Too much and repetitive	13
Messy	Too messy and builds up during holidays Spews out of letterbox and into drains Makes the streets look dirty Messes up our letterbox	7
Irrelevant	Too much of it is irrelevant to me They send me stuff of no relevance It's usually irrelevant to me It's all irrelevant	5

Base: Sample = 1,100.

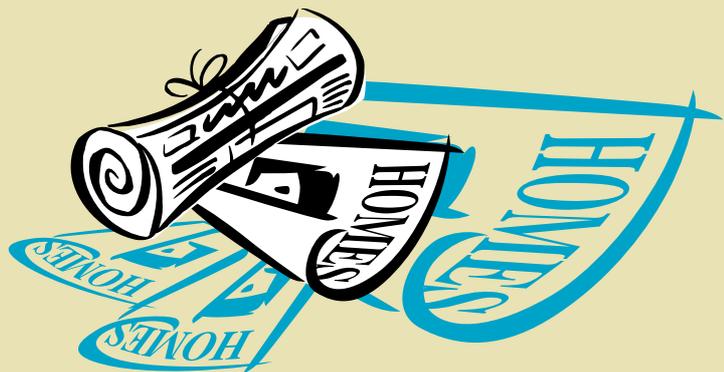
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

Does Receiving Unaddressed Advertising Mail Influence the Buying Decision

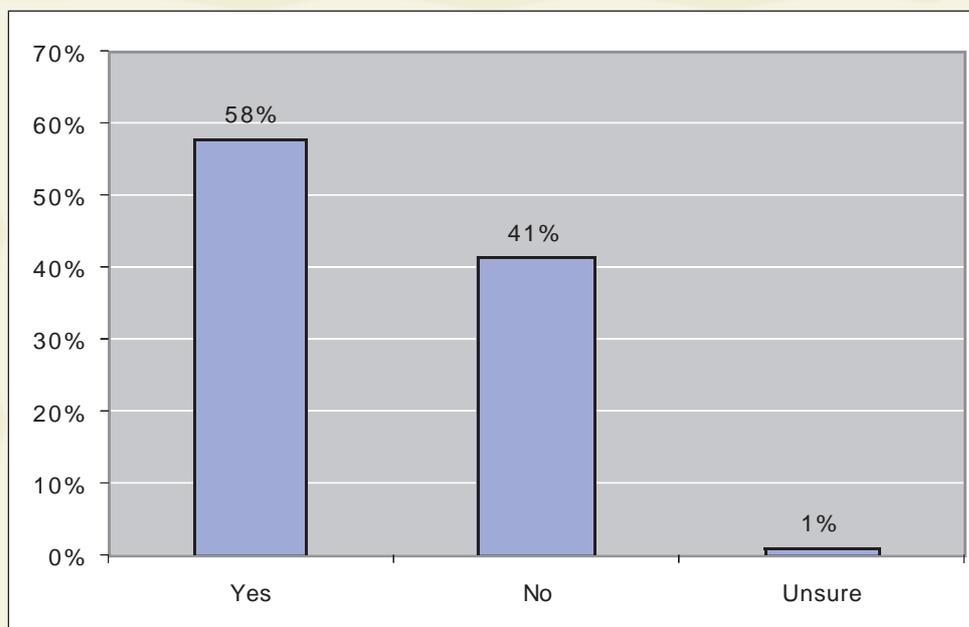
58% of Consumers say receiving Unaddressed Advertising Mail influences their buying decision.

This figure is similar to the 55% of Consumers who say they purchase as a result of receiving Unaddressed Advertising Mail as detailed later in this report.



Unaddressed Advertising Mail

Does Receiving It Influence the Buying Decision



YES

- I get most of my shopping information from it
- I only shop where I know the bargains are
- I use it to do my shopping locally

NO

- Not when I don't even look at it
- I bin it without reading it
- It's just rubbish

UNSURE

- I look at it but am not sure if it influences me
- Good question - don't know
- It might - I'm not too sure

Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Percentage of Unaddressed Advertising Mail Items Are Opened and Read

Consumers open and read 63% of the Unaddressed Advertising Mail items they receive.

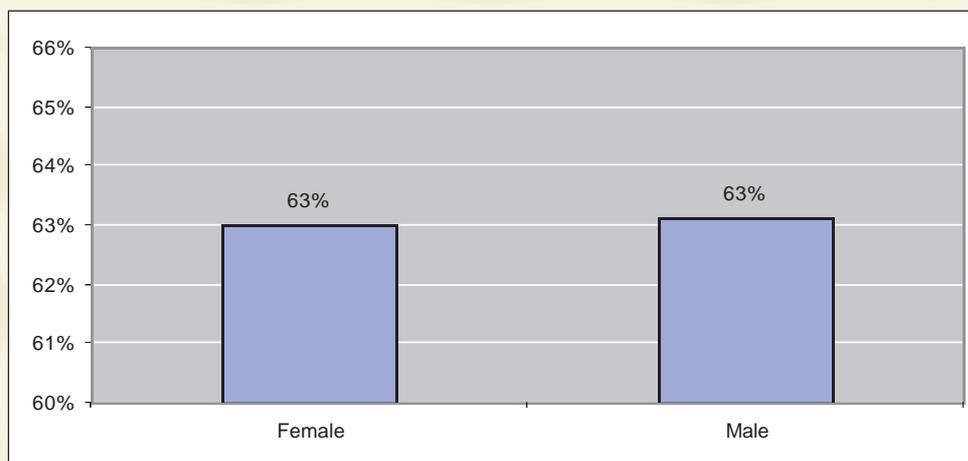
The 25-34 age group opens and reads the highest percentage of Unaddressed Advertising Mail items received.

The \$40-49K household income bracket opens and reads the highest percentage of Unaddressed Advertising Mail items received.

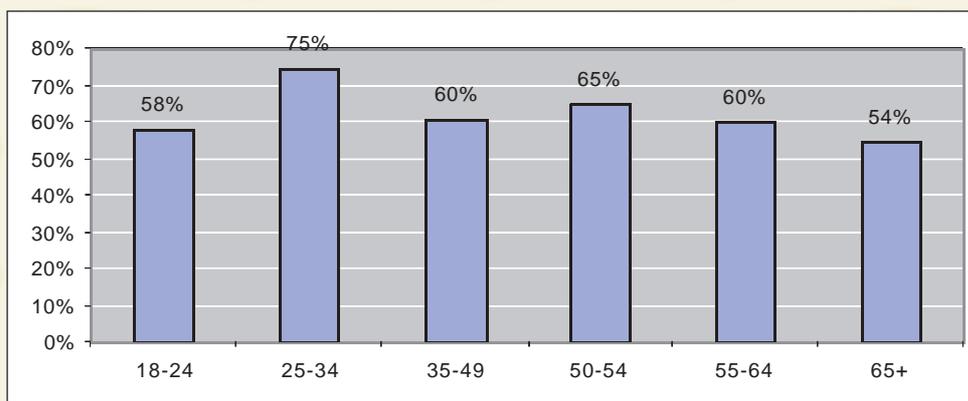


Unaddressed Advertising Mail

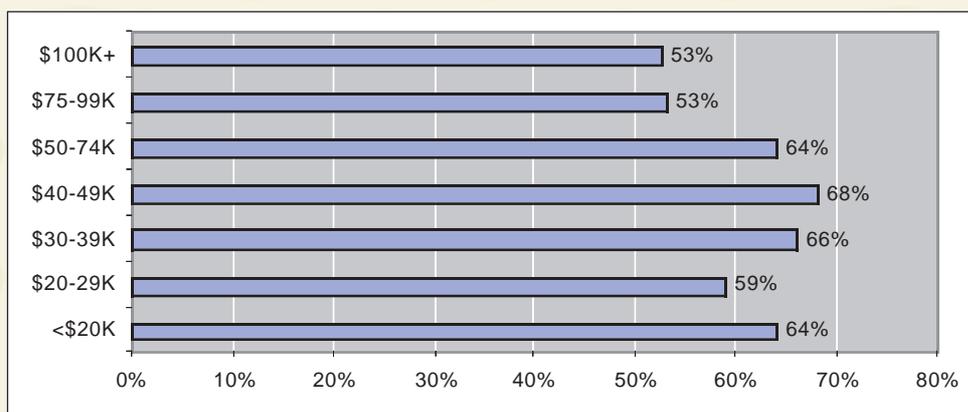
What Percentage of Items Received are Opened and Read



By Age



By Household Income



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

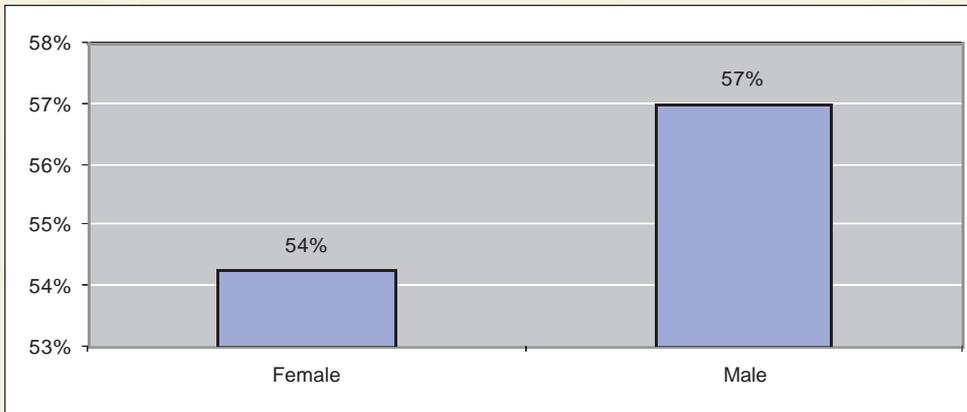
What Percentage of Consumers Purchase as a Result of Receiving Unaddressed Advertising Mail

54% of female and 57% of male Consumers say they purchase as a result of receiving Unaddressed Advertising Mail items.



Unaddressed Advertising Mail

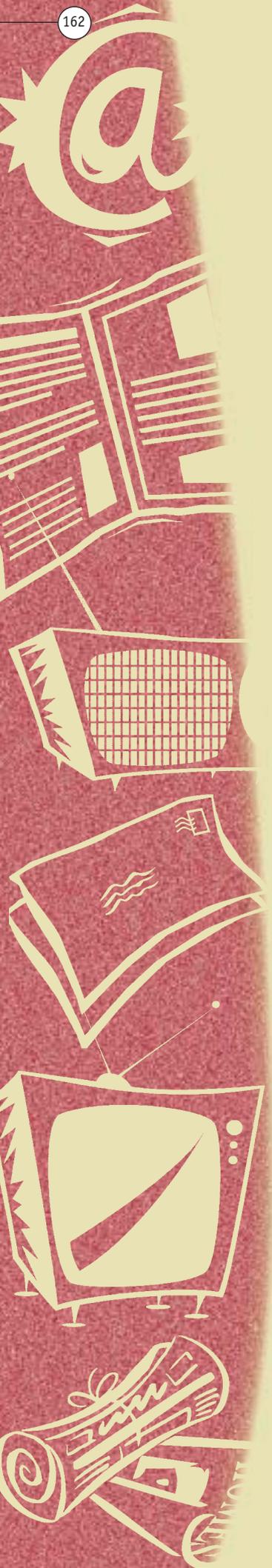
What Percentage of Consumers Purchase as a Result of Receiving It



Base: Sample = 608.

Source: ResponseAbility Consumer Research 2001.

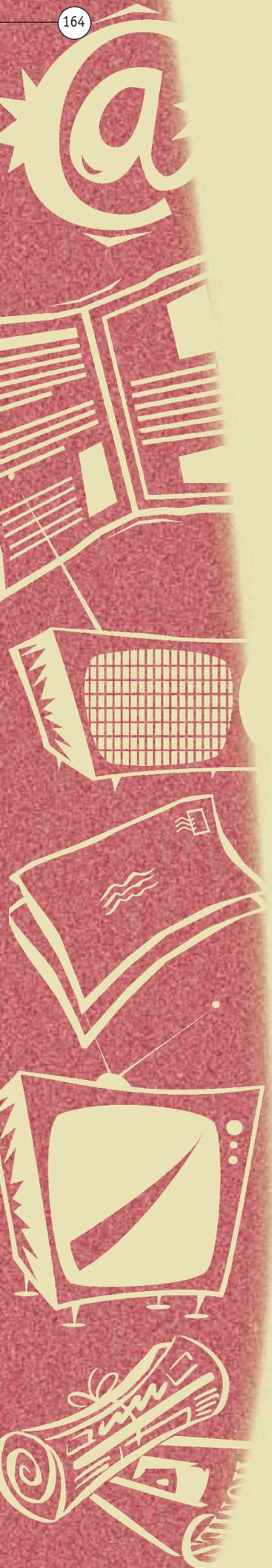
Marketing Media in Australia



Email Advertising



Marketing Media in Australia



Email Advertising – An Overview

Consumers

- 43% of Consumers say they have been subject to Email Advertising
- 47% of Consumers who have been subject to Email Advertising enjoy or are indifferent to it
- 31% of Consumers who have been subject to it can nominate an element of it that they like
- 84% of Consumers subject to it can nominate an element of it that they don't like
- 5% of Consumers say Email Advertising influences their purchasing decision
- 5% of Consumers say they purchase as a result of receiving Email Advertising
- 23% of Consumers say they have access to Email at home only
- 15% of Consumers say they have access to Email both at work and at home
- 5% of Consumers say they have access to Email at work only

Business Receivers

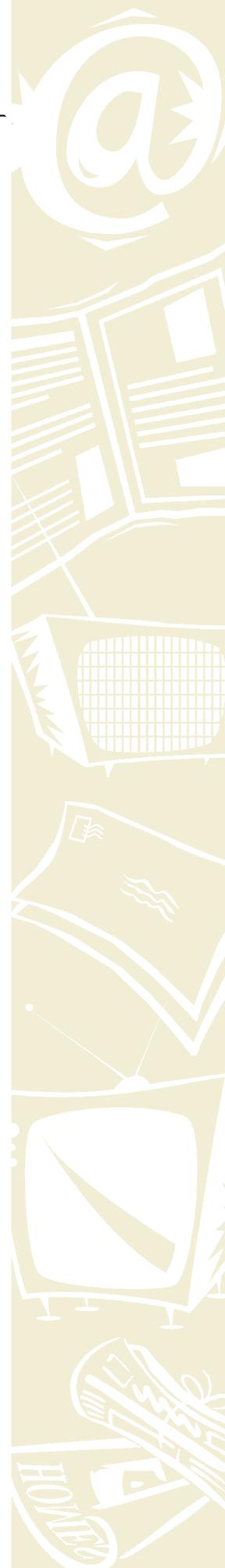
- 40% of Business Receivers enjoy or are indifferent to receiving Email Advertising
- 37% of Business Receivers say they open 100% of Email Advertisements received
- 67% of Business Receivers say their use of Email Advertising will increase in the next 12 months

Business Senders

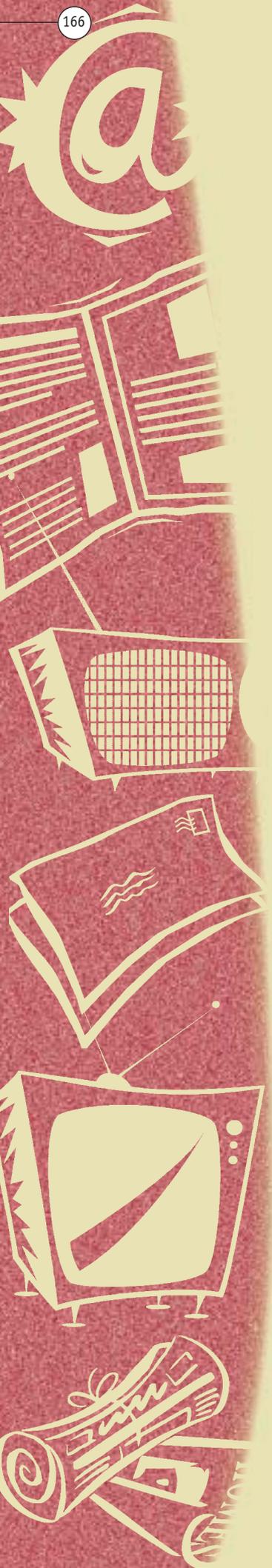
- 39% of Business Senders enjoy or are indifferent to receiving Email Advertising
- 44% of Business Senders say they open 100% of Email Advertisements received
- 73% say their use of Email Advertising will increase or stay the same in the next 12 months

Gatekeepers and Personal Assistants (Filterers)

- 39% of Filterers enjoy or are indifferent to receiving Email Advertising
- 40% of Filterers say that they open 100% of Email Advertisements received



Marketing Media in Australia



Email Advertising – What Consumers Think

Contents

- Do Consumers Enjoy Receiving Email Advertising 169
- What Consumers Like About Email Advertising 171
- What Consumers Don't Like About Email Advertising 173
- Does Email Advertising Influence the Buying Decision 175
- What Percentage Purchase as a Result of Receiving Email Advertising 177
- What Percentage of Consumers Have Access to Email at Work/Home 179



Marketing Media in Australia

Do Consumers Enjoy Receiving Email Advertising

Only 43% of Consumers say they have been subject to Email Advertising. 47% of these Consumers either enjoy or are indifferent to receiving Email Advertising (20% of population).

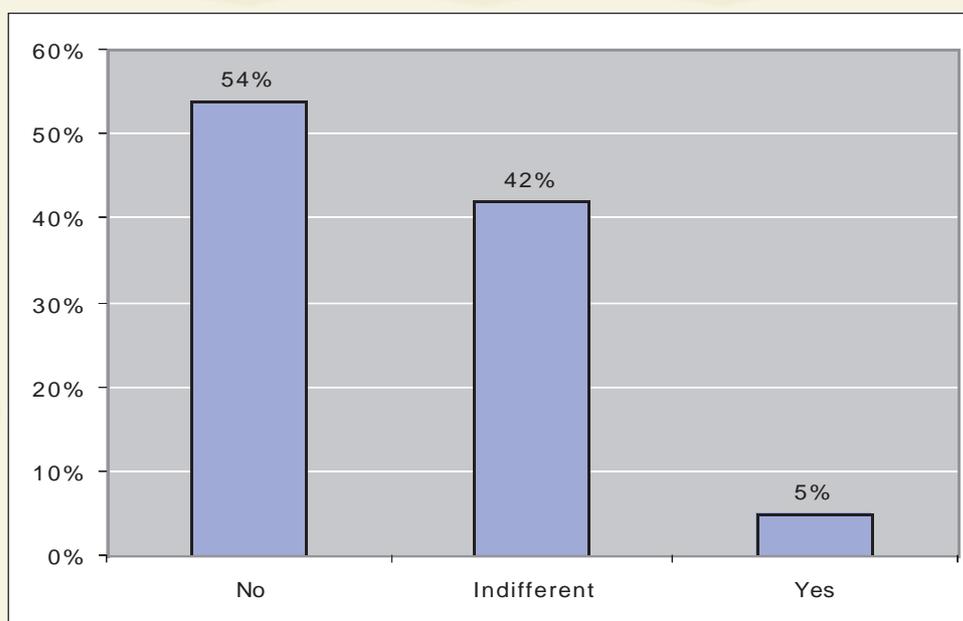
There appears to be little difference in the attitudes of males and females in regard to receiving Email Advertising.

Graphs as to age and household income have not been produced due to the small sample of 22 Consumers who say they enjoy Email Advertising.

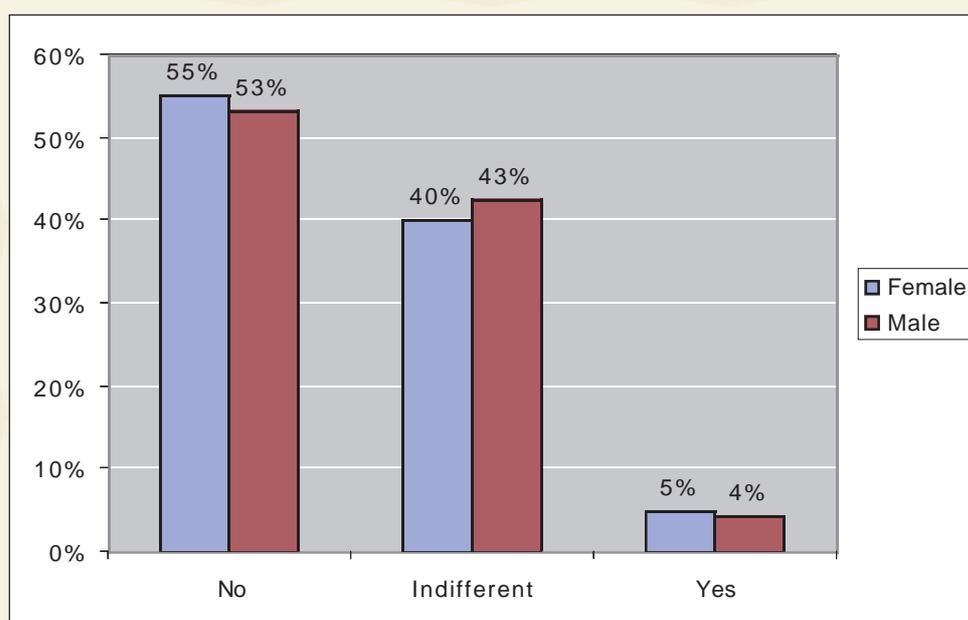


Email Advertising

Do Consumers Enjoy Receiving It



By Sex



Base: Sample = 472.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Like About Email Advertising

31% of Consumers who have a comment on Email Advertising can nominate an element of receiving Email Advertising that they like.

The main reasons that those Consumers like Email Advertising are that it is perceived to be quick and easy to receive, informative and forms a permanent record.



Email Advertising

What Consumers Like About It

DISLIKE	COMMENTS	%
Nothing	I don't even open them Delete them immediately Very annoying I hate them	69
Easy	Can read it and delete it easily Can read it at my leisure An easy process I am in control	13
Quick	Quick and easy to open and delete Doesn't take long Quick and efficient Very quick	8
Information	Good for information on special products Good for a variety of information I get the information I request Staying informed	6
Other	It's a permanent record Less paper wastage Can't loose it It's cool	4

Base: Sample = 472.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Don't Like About Email Advertising

84% of Consumers who have a comment on Email Advertising can nominate an element of Email Advertising that they don't like.

The main reasons that those Consumers dislike Email Advertising are concerns about electronic viruses, the fact that they perceive that there is too much Email Advertising and that it is seen to be wasteful, intrusive and an invasion of privacy.



Email Advertising

What Consumers Don't Like About It

ISSUE	COMMENTS	%
Other	Viruses that can destroy my computer Very careful about opening email Have no idea who they are from Concerned about viruses	52
Nothing	They can be informative I don't dislike them I don't mind them Indifferent	16
Too Much	Takes up too much space on my computer Too much unsolicited junk Too much irrelevant stuff Way too many	13
Wasteful	Time consuming to download Time wasting and intrusive Process takes too long Waste of my time	10
Privacy	Invasion of my privacy and takes too long Where do they get my details from I need a password - they don't Lack of censorship	5
Intrusive	How dare they assume I want this stuff I am busy enough without this rubbish Imposition on my work time Don't send them to me	4

Base: Sample = 472.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

Does Email Advertising Influence the Buying Decision

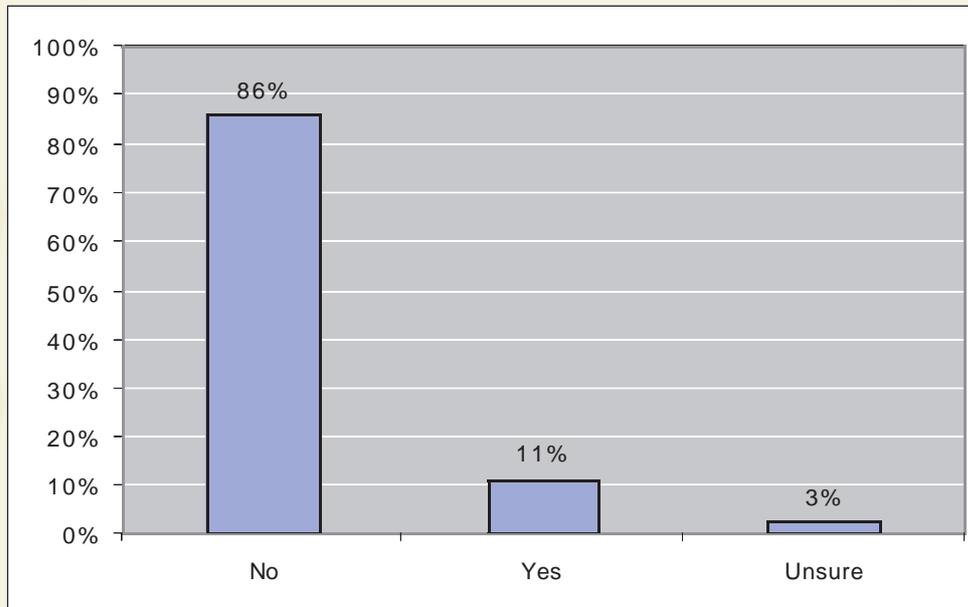
11% of the 43% of the sample who say they have been subject to Email Advertising (5% of overall sample) say Email Advertising influences their buying decisions.

This figure is similar to the 9% of Consumers that have been subject to Email Advertising (5% of overall sample) who say that they purchase as a result of Email Advertising.



Email Advertising

Does Receiving It Influence the Buying Decision



YES

It's good because I get them at work and have time to digest them
 Because I tend to receive stuff that's of interest to me
 I only open what I am interested in

NO

How can they get my email address and send me stuff without my permission
 I am so concerned about viruses that I don't even open them
 I hate the things

UNSURE

I tend not to like them but they may influence me
 I don't mind them at work but not at home
 I don't know - I open them

Base: Sample = 472.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

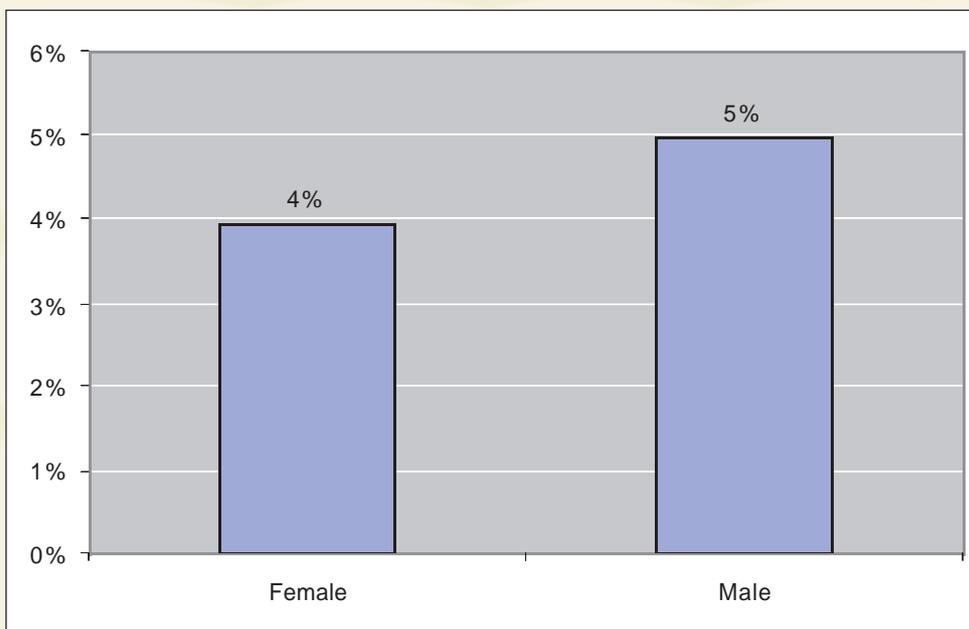
What Percentage of Consumers Purchase as a Result of Receiving Email Advertising

5% of Consumers say they purchase as a result of receiving Email Advertising.



Email Advertising

What Percentage of Consumers Purchase as a Result of Receiving It



Base: Sample = 51.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

How Many Consumers Have Access to Email at Work/Home

23% of Consumers have access to Email at home only, 15% have access both at home and at work, and 5% of Consumers have access to Email at work only.

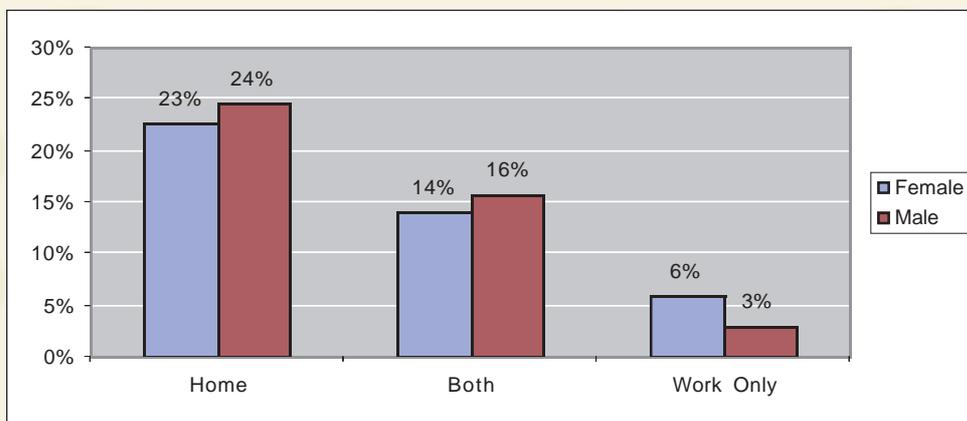
The 18-24 age group has by far the greatest access to Email in the home.

The \$75-99K income bracket has the greatest access to Email at home.

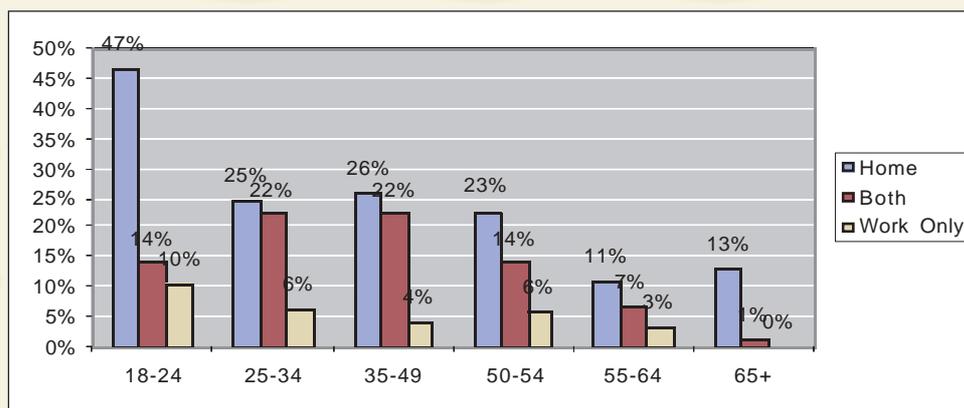


Email Advertising

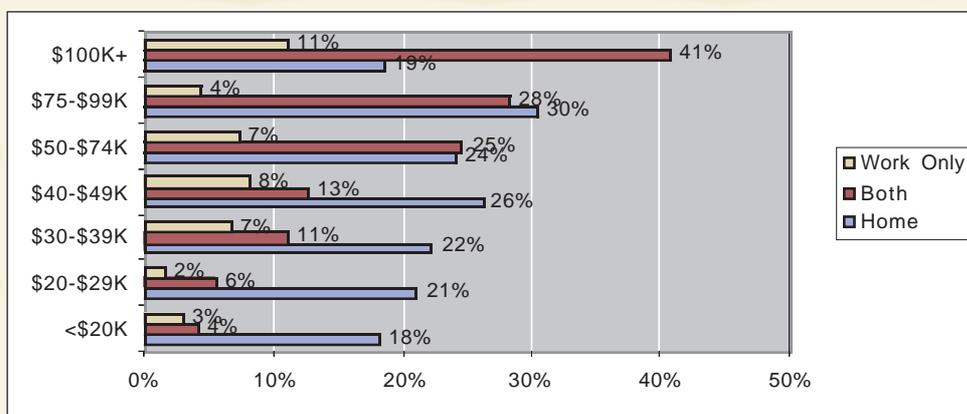
How Many Consumers Have Access to Email at Work/Home



By Age



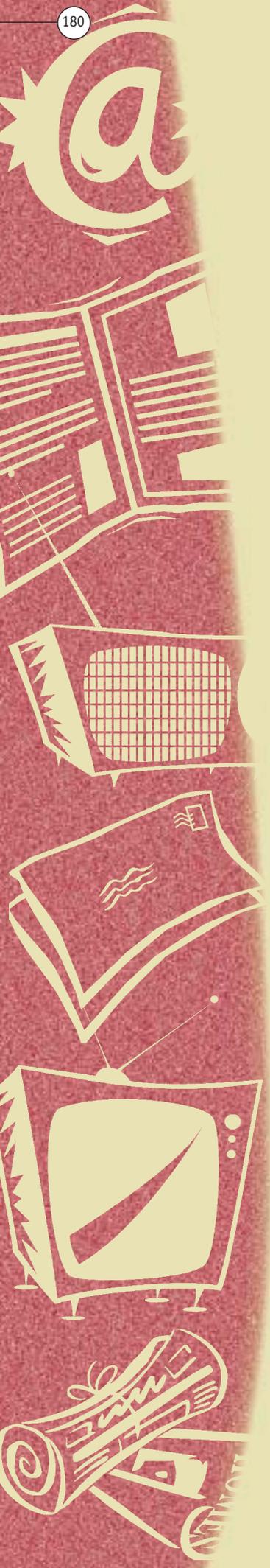
By Household Income



Base: Sample = 472.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia



Email Advertising - What Business People Think

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- Do Business People Enjoy Receiving Email Advertising 183
- What Percentage of Email Advertisements Are Opened 185
- Business Senders Email Advertising Intentions for the Next 12 Months 187



Marketing Media in Australia

Do Business People Enjoy Receiving Email Advertising

40% of Business Receivers say they enjoy or are indifferent to receiving Email Advertising.

39% of Business Senders say they enjoy or are indifferent to receiving Email Advertising.

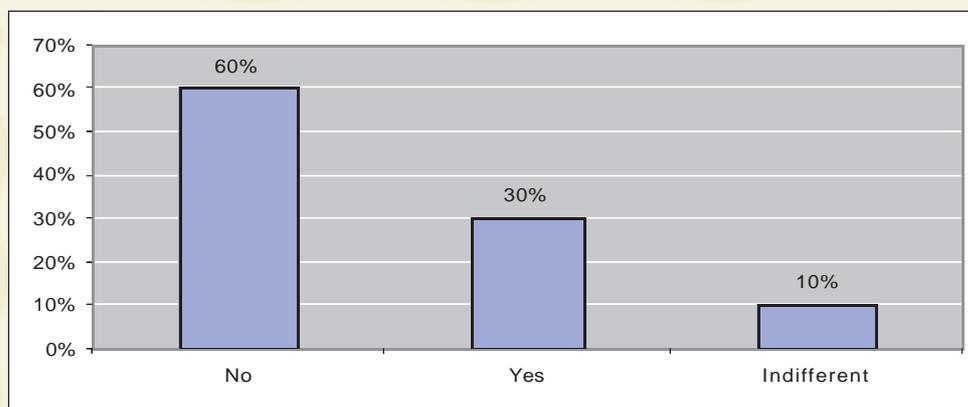
39% of Gatekeepers and Personal Assistants say they enjoy or are indifferent to receiving Email Advertising.



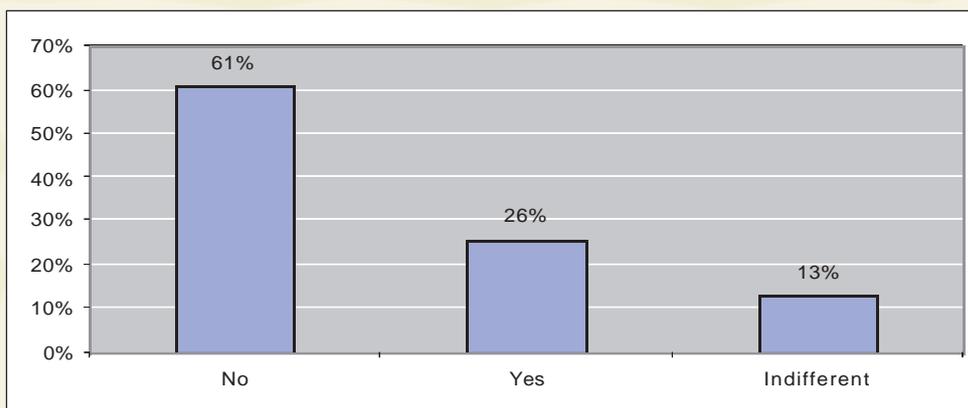
Email Advertising

Do Business People Enjoy Receiving It

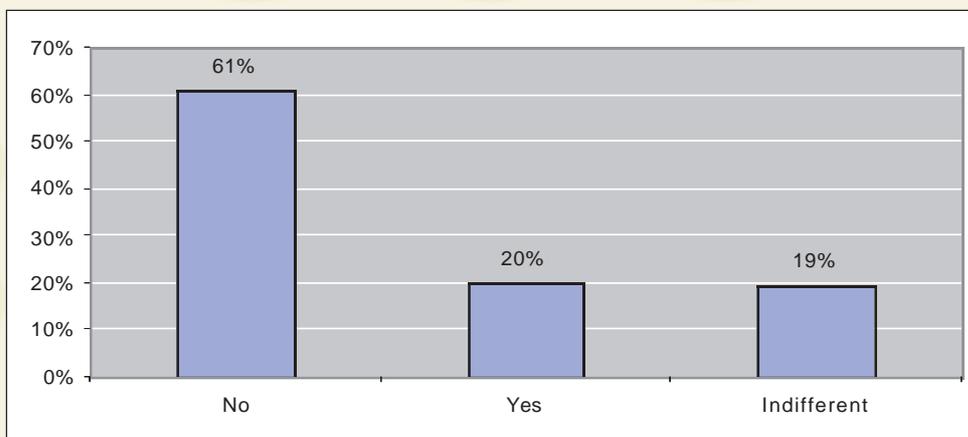
Receivers



Senders



Gatekeepers and Personal Assistants



Base: Graph 1 Sample = 213. Graph 2 Sample = 187. Graph 3 Sample = 100.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

What Percentage of Email Advertisements Are Opened

37% of Business Receivers say they open 100% of the Email Advertisements that they receive.

44% of Business Senders say they open 100% of the Email Advertisements that they receive.

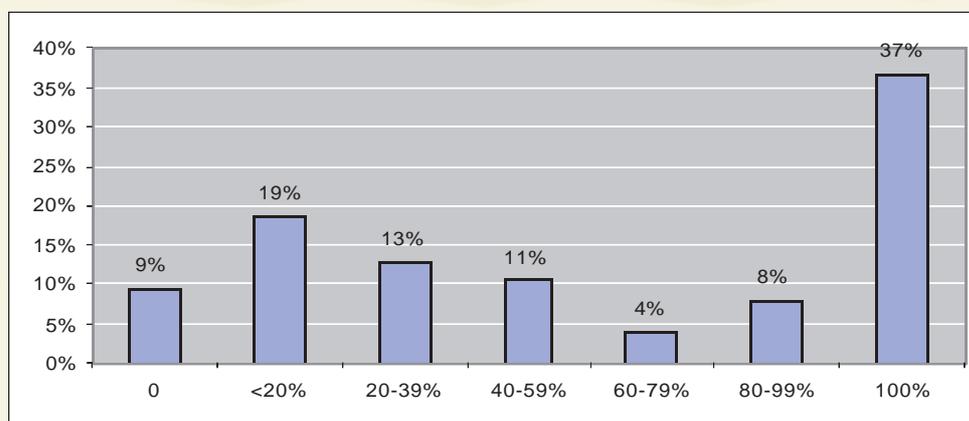
40% of Gatekeepers and Personal Assistants say they open 100% of the Email Advertisements they receive.



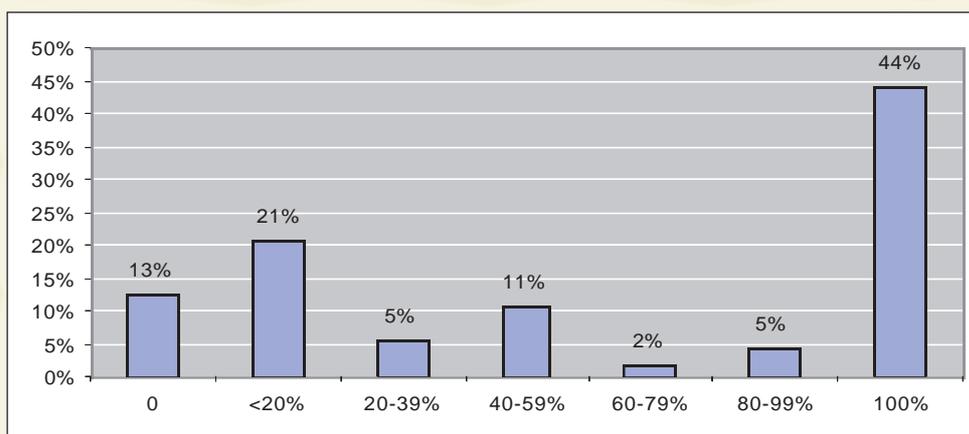
Email Advertising

How Many Advertisements are Opened by Business People

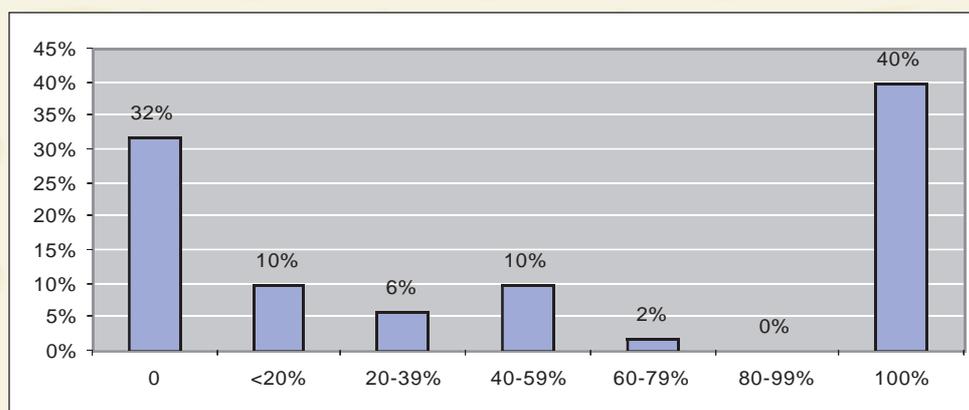
Receivers



Senders



Gatekeepers & Personal Assistants



Base: Graph 1 Sample = 213. Graph 2 Sample = 187. Graph 3 Sample = 100.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia

Business People's Email Advertising Intentions for the Next 12 Months

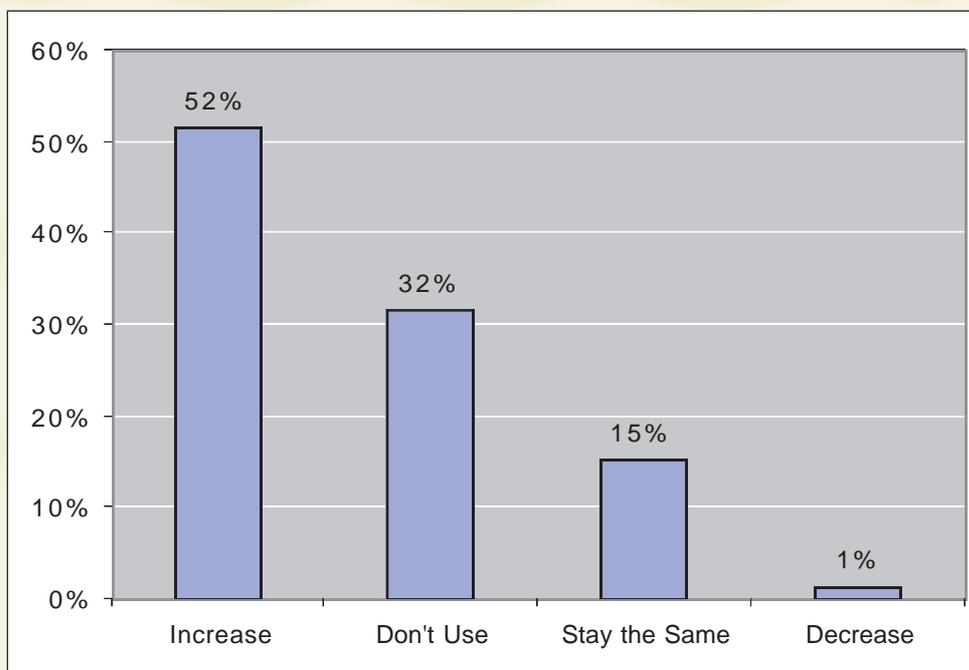
67% of Business Receivers say their usage of Email Advertising will increase or stay the same over the next year (usually off a low base).

73% of Business Senders say their usage of Email Advertising will increase or stay the same over the next year (usually off a low base).

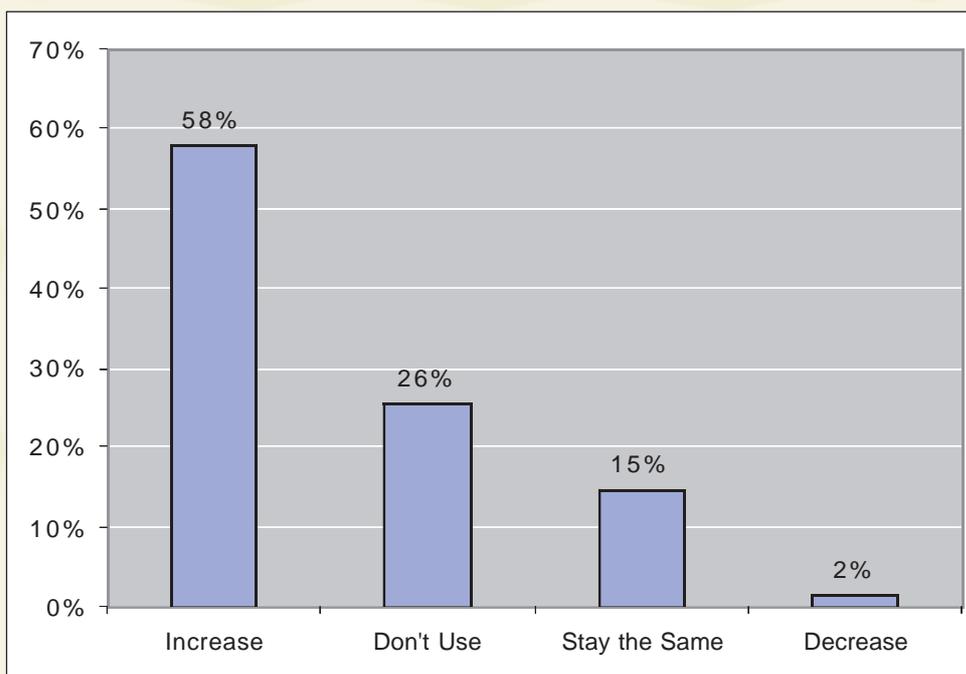


Email Advertising

Business People's Email Advertising Intentions for the Next 12 Months



Senders



Base: Graph 1 Sample = 213. Graph 2 Sample = 187.
Source: ResponseAbility Business Research 2001.

Marketing Media in Australia



TV Advertising

Marketing Media in Australia



TV Advertising - An Overview

Consumers

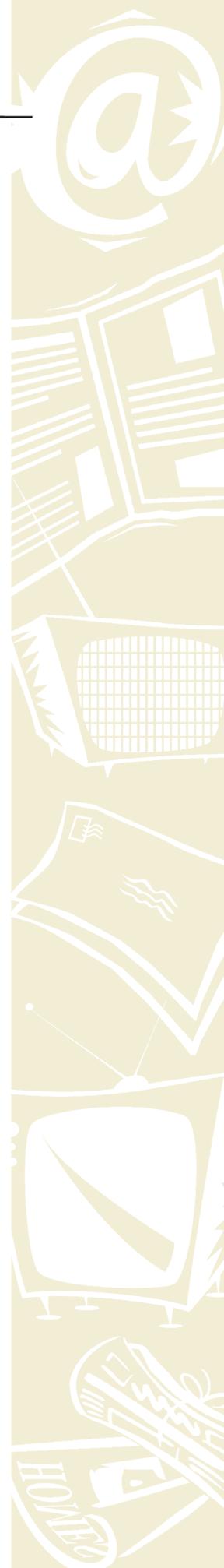
55% of Consumers enjoy or are indifferent to watching TV Advertising

57% of Consumers can nominate an element of TV Advertising that they like

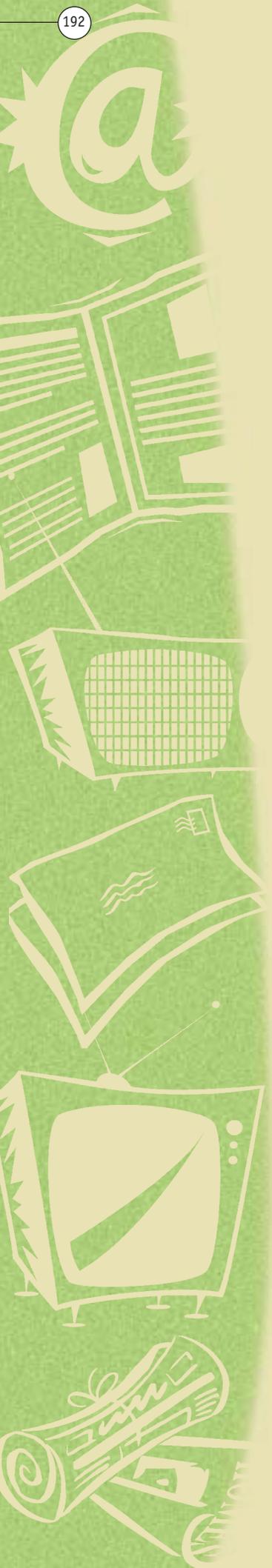
95% of Consumers can nominate an element of TV Advertising that they don't like

41% of Consumers say that TV Advertising influences their purchasing decisions

50% of Consumers say that they purchase as a result of watching TV Commercials



Marketing Media in Australia



TV Advertising - What Consumers Think

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- Do Consumers Enjoy TV Advertising 195
- What Consumers Like About TV Advertising 197
- What Consumers Don't Like About TV Advertising 199
- Does TV Advertising Influence the Buying Decision 201
- How Many Consumers Purchase as a Result of TV Advertising 203



Marketing Media in Australia

Do Consumers Enjoy TV Advertising

55% of Consumers either enjoy or are indifferent to TV Advertising.

There appears to be little difference in the attitude of males and females in regard to enjoying TV Advertising.

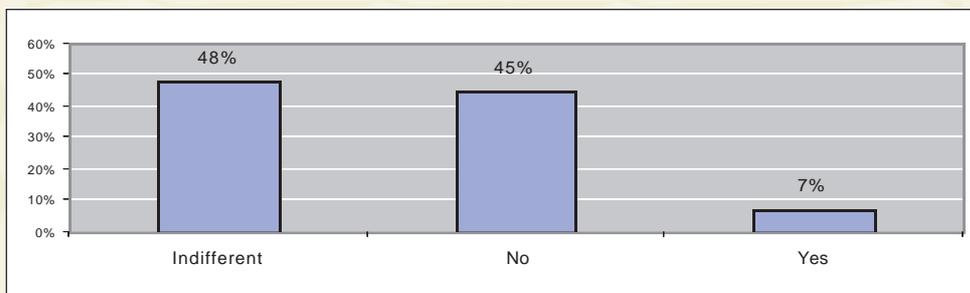
The 18-24 age group most enjoys watching TV Advertising.

Households with an income of <\$20K enjoy watching TV Advertising the most.

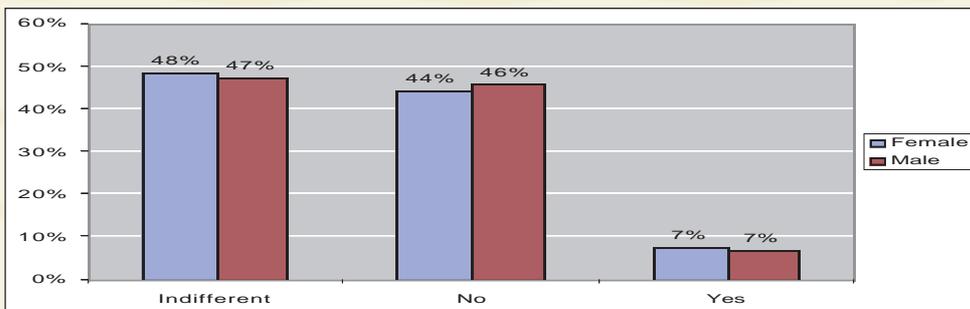


TV Advertising

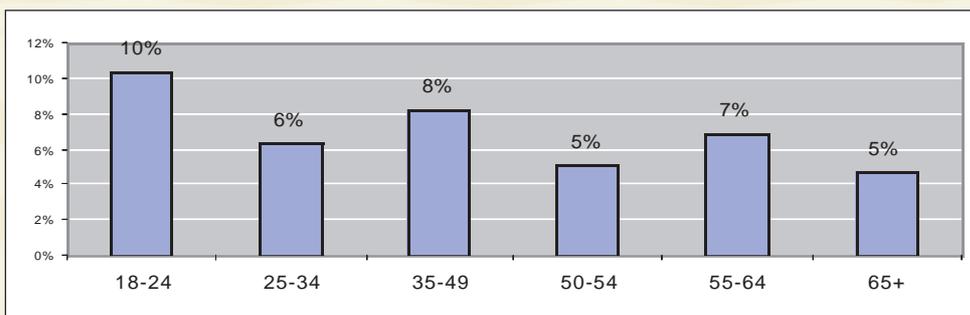
Do Consumers Enjoy It



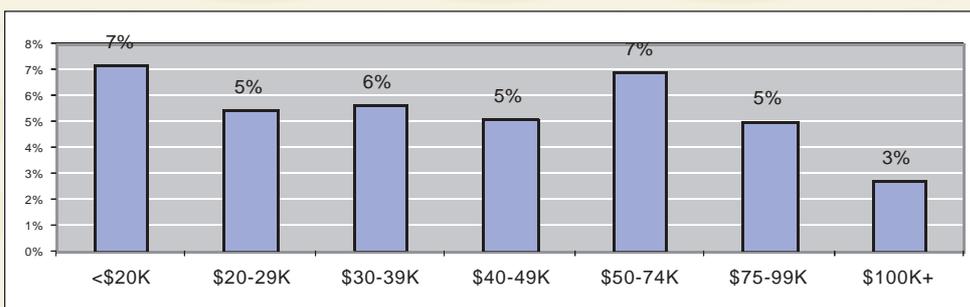
By Sex



Yes - By Age



Yes - By Income



Base: Graphs 1 & 2 = Sample = 1,100. Graphs 3 & 4 Sample = 77.
 Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Like About TV Advertising

57% of Consumers can nominate an element of TV Advertising that they like.

The main reasons those Consumers like TV Advertising are that TV ads can be funny, informative, clever and catchy, they may include good jingles and they provide a break in the programming.



TV Advertising

What Consumers Like About It

APPEAL	COMMENTS	%
Nothing	They're the reason I watch the ABC and SBS Switch station when ad comes on Nothing much None of them	43
Other	Ads are good if made properly Breaks up TV programs Entertainment for kids Pays for free TV	20
Humour	Like funny and strange ads Good entertainment value Funny and informative Only like funny ads	16
Informative	Opportunity to purchase if appropriate Keeps me informed of new products New products and specials Keeps me informed	12
Clever	Clever ads capture my attention Colourful and funny Clever and catchy Clever and funny	4
Break	Provides break in program Chance to get to fridge Time to make a cuppa Time to go to toilet	3
Jingles	Ads without music don't work The music can be great Jingle must be good Like clever jingles	2

Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Don't Like About TV Advertising

95% of consumers can nominate an element of TV Advertising they don't like.

The main reasons those Consumers dislike TV Advertising are that they believe there are too many ads, the ads are louder than the program and are too loud, and the breaks are too long. Some believe the ads to be interruptive, intrusive and repetitious.



TV Advertising

What Consumers Don't Like About It

ISSUE	COMMENTS	%
Too Many	Too many after the movie Too many and repetitive Too many annoying ads Just far too many	20
Too Loud	Louder than the program Too loud and too long Loud and intrusive Noisy and tasteless	20
Too Long	Too long and too frequent Should be a time limit Too lengthy and boring Too long and intrusive	18
Intrusive	Always at the wrong time in show Time wasting and intrusive Hate ads during footy Gets on my nerves	17
Other	Should not use sex to sell Bad influence on children Treat you like an idiot Brain washing	14
Repetitious	Too much repetition during break Repetitive and boring Stupid and repetitive Same ads all the time	6
Nothing	Sometimes better than the program Don't mind the ads Gives me a break Fills in the night	5

Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

Does TV Advertising Influence the Buying Decision

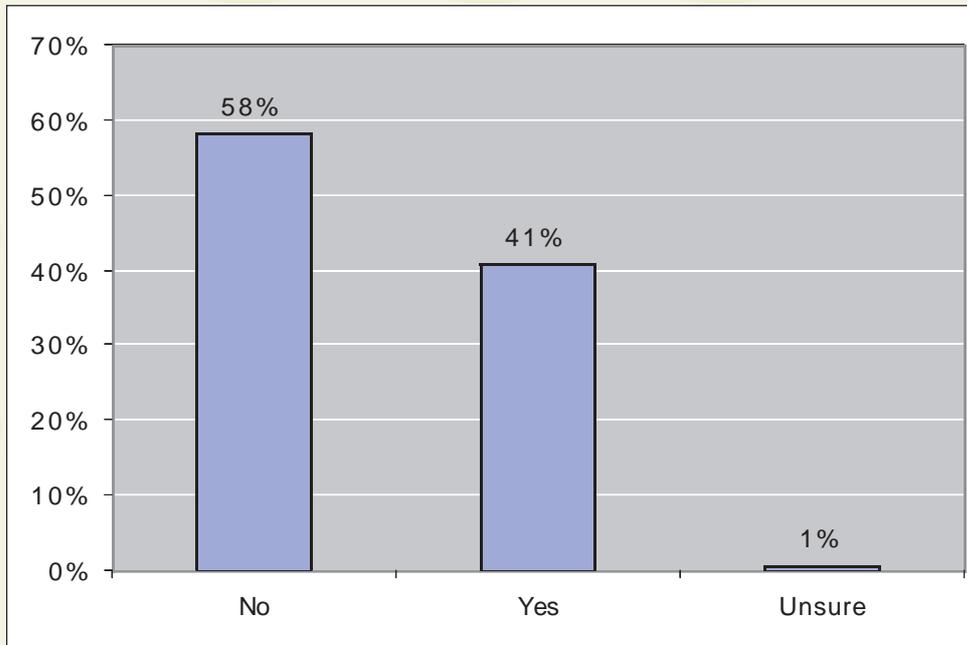
41% of Consumers say watching TV Advertising does influence their buying decisions.

This figure is similar to the 50% of Consumers who say they purchase as a result of watching TV Advertising as detailed later in this document.



TV Advertising

Does TV Advertising Influence the Buying Decision



YES

- It's hard not to be influenced by TV commercials
- I saw the car and knew I had to check it out
- I must see hundreds of ads a month

NO

- I switch off the remote when the ads come on
- I never watch the ads
- I ignore the ads

UNSURE

- It may influence me, I'm not sure
- You think they would but I don't know
- I am open to many influences

Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

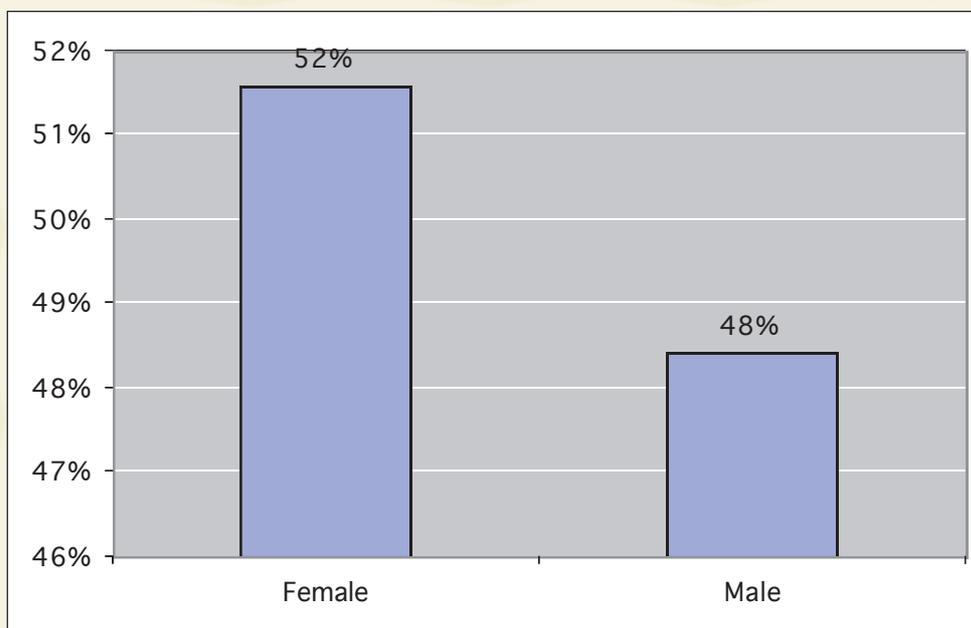
What Percentage Consumers Purchase as a Result of TV Advertising

52% of female and 48% of male Consumers say they purchase as a result of TV Advertising.



TV Advertising

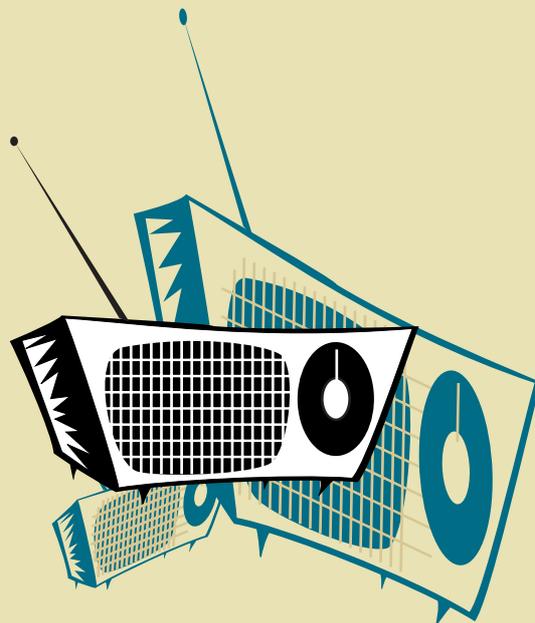
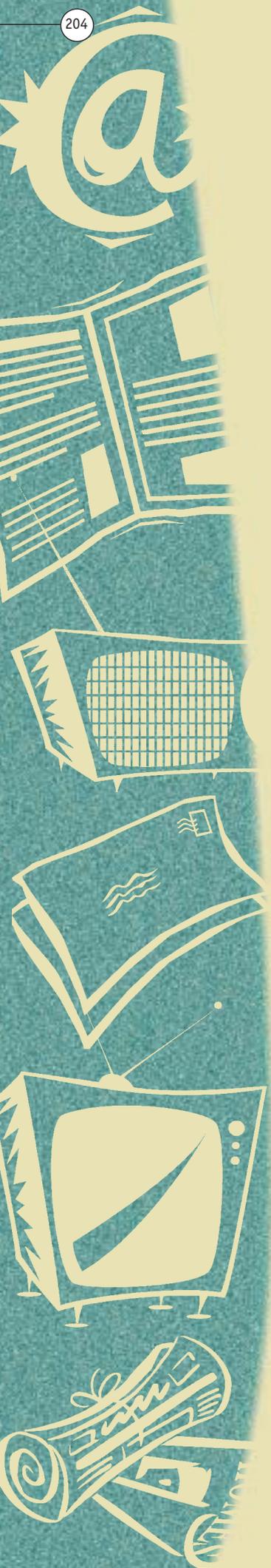
What Percentage of Consumers Purchase as a Result of It



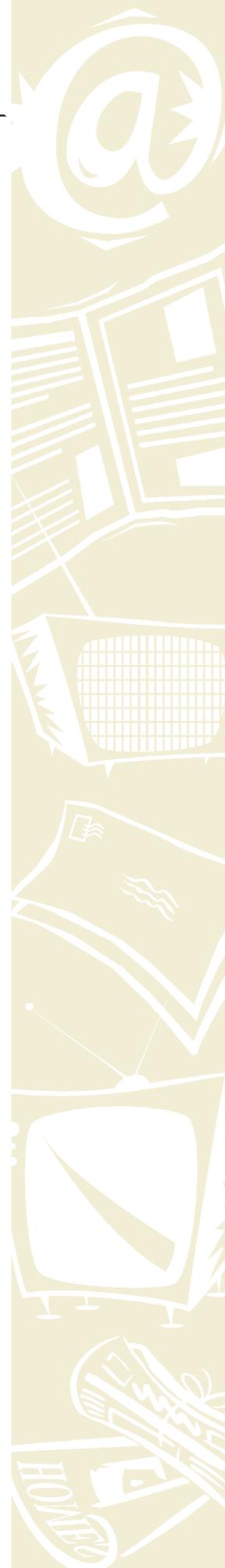
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

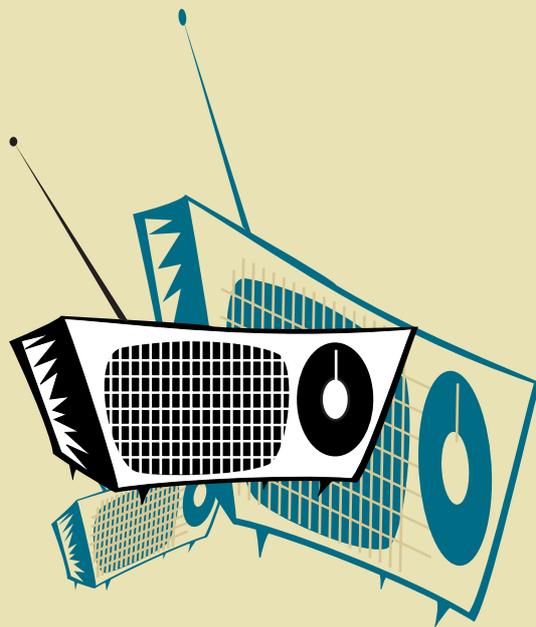
Marketing Media in Australia



Radio Advertising



Marketing Media in Australia



Radio Advertising – An Overview

Consumers

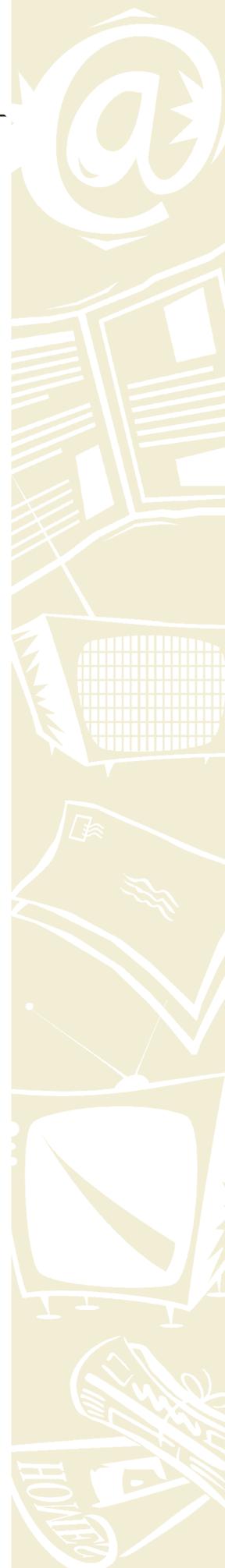
72% of Consumers either enjoy or are indifferent to Radio Advertising

50% of Consumers can nominate an element of Radio Advertising that they like

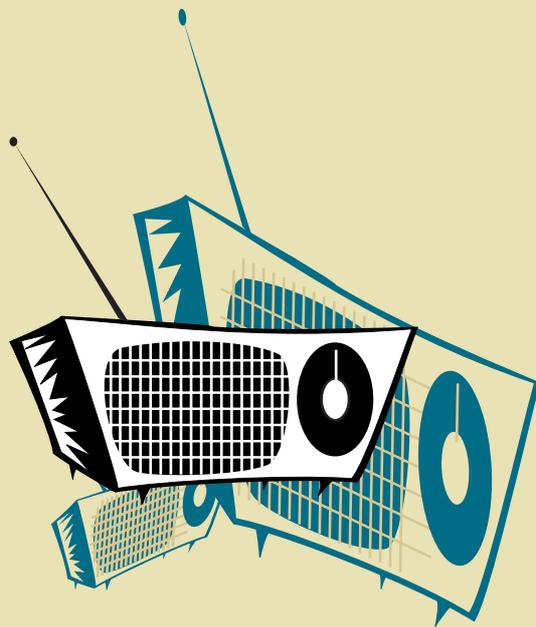
74% of Consumers can nominate an element of Radio Advertising that they don't like

18% of Consumers say that Radio Advertising does influence their purchasing decision

14% of Consumers say that they purchase as a result of Radio Advertising



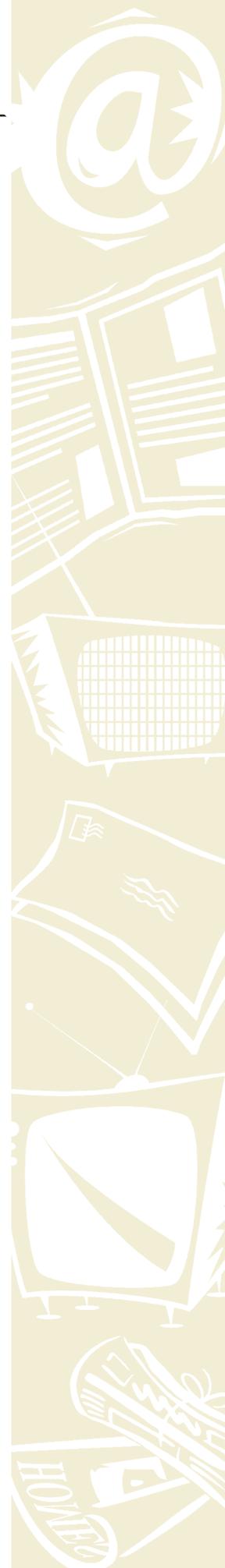
Marketing Media in Australia



Radio Advertising - What Consumers Think

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● What Consumers Don't Like About Radio Advertising	215
● Does Radio Advertising Influence the Buying Decision	217
● How Many Consumers Purchase As a Result of Radio Advertising	219



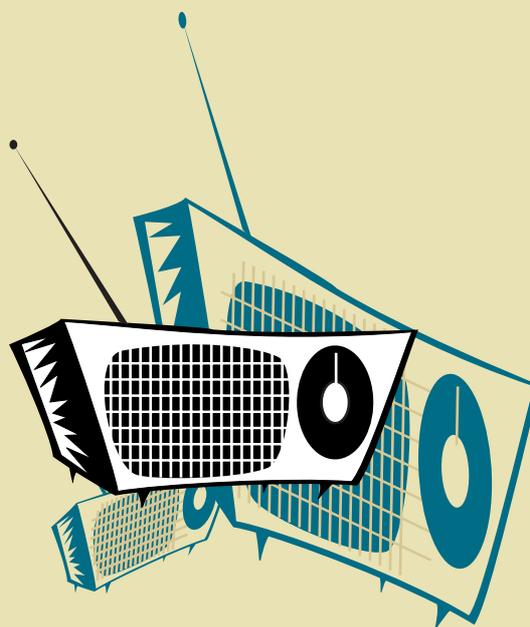
Marketing Media in Australia

Do Consumers Enjoy Radio Advertising

72% of Consumers either enjoy or are indifferent to Radio Advertising.

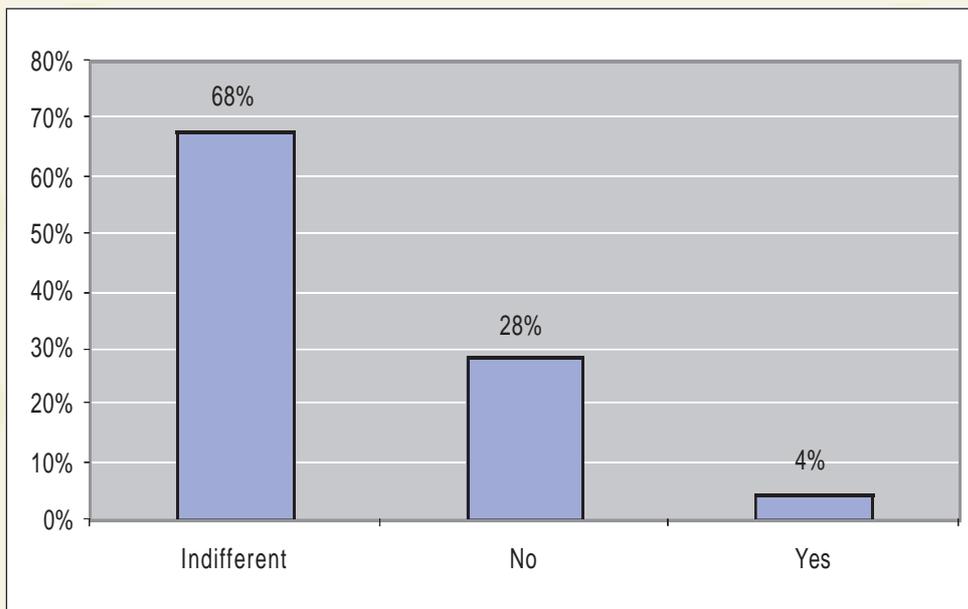
There appears to be little difference in the attitude of males and females in regard to enjoying Radio Advertising.

Graphs showing breakdowns by age and household income have not been produced due to the small sample of 47 Consumers who enjoy Radio Advertising.

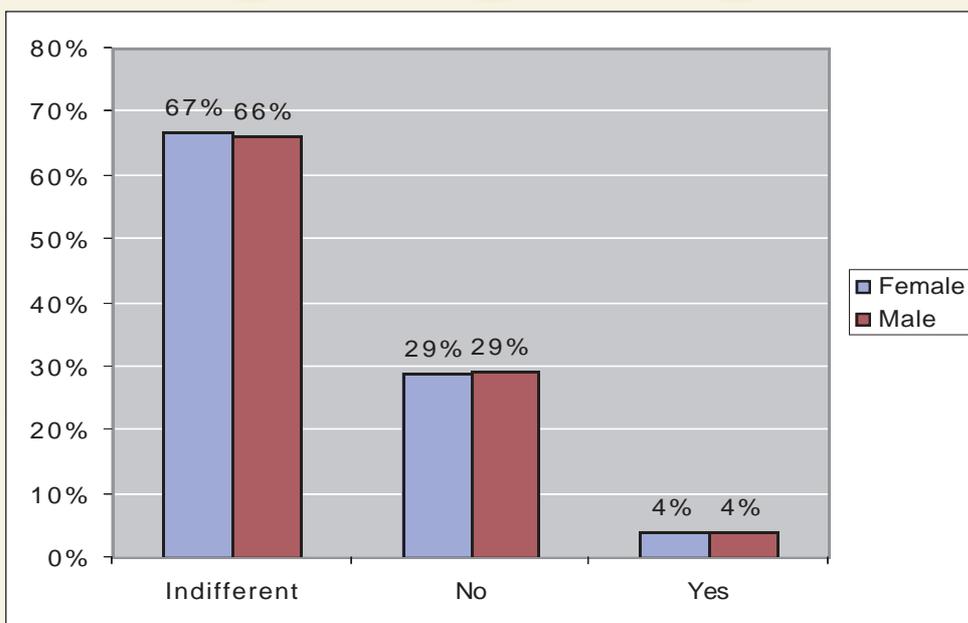


Radio Advertising

Do Consumers Enjoy It



By Sex



Base: Sample = 1,100.

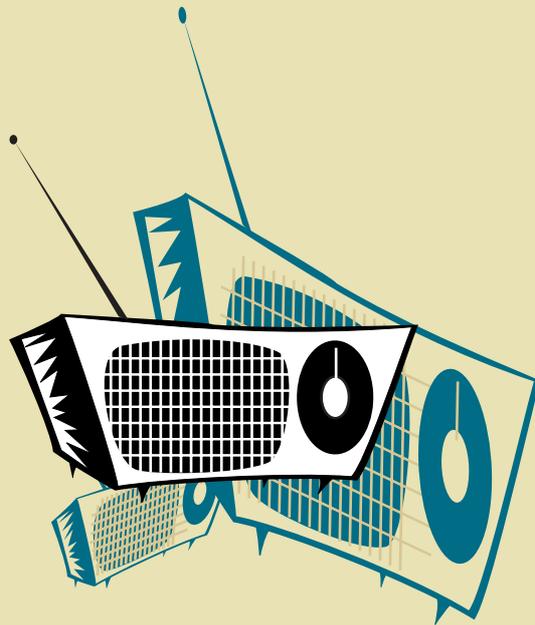
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Like About Radio Advertising

50% of Consumers can nominate an element of Radio Advertising that they like.

The main reasons that those Consumers like Radio Advertising are the fact that Radio Advertising is seen to be less intrusive than TV Advertising, Radio Advertising is seen to be informative and humorous and Consumers can tune out if they wish.



Radio Advertising

What Consumers Like About Receiving It

APPEAL	COMMENTS	%
Nothing	Can't think of anything They're all the same Nothing at all What's to like	50
Other	Good to listen in the car Quick and to the point Like the jingles Variety	39
Less Intrusive Than TV Advertising	Not as invasive as TV Advertising Not as in your face Not as noticeable Less interfering	4
Informative	Find out about the sales New product information Exposure to information Specials and sales	3
Can Tune Out	Don't have to pay attention Can ignore it - block it out Easier to ignore Can flick it off	2
Humour	Like humorous radio ads Humorous information Humorous and catchy Like Wendy Harmer	2

Base: Sample = 1,100.

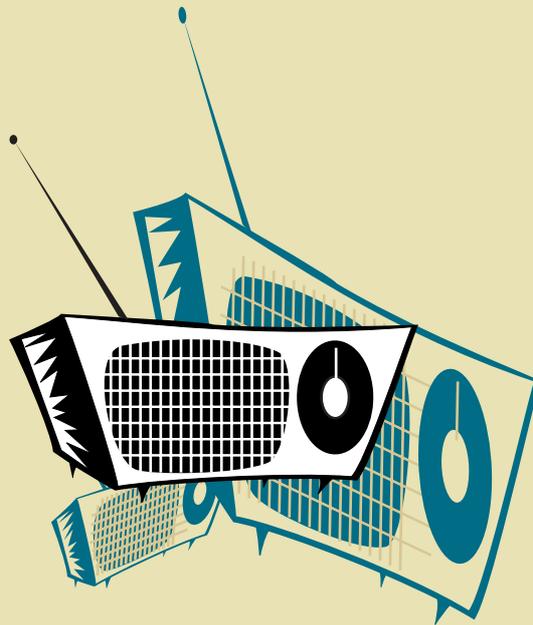
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Don't Like About Radio Advertising

74% of Consumers can nominate an element of Radio Advertising that they don't like.

The main reasons that those Consumers dislike Radio Advertising are that they are perceived to interrupt the program (especially music programs), there are too many ads, the ads are repetitious and the fact that products being advertised on Radio cannot be seen.



Radio Advertising

What Consumers Don't Like About It

DISLIKE	COMMENTS	%
Other	I turn off when the ads come on Try not to listen to them Hard to switch off Boring ads	40
Nothing	It's just part of listening to the radio Radio ads are sometimes funny Again it pays for free radio I don't mind radio ads	26
Interruptive	I only want to listen to the music Interrupts the program Stops the music Intrusive	17
Too Many	Excessive number of radio ads Takes up too much time Too many and too intrusive Far too many ads	9
Repetitive	Same old ads all the time Repetitive and boring Number of repeat ads Sick of repetition	5
Indifferent	Don't listen to radio ads Try not to listen to ads No opinion Don't care	2
Can't See Product	Can't see what's being offered Can't see products advertised Can hear but not see No touch no feel	1

Base: Sample = 1,100.

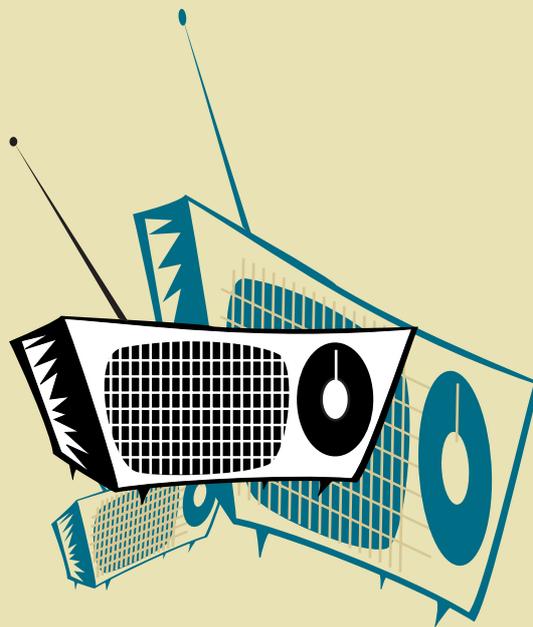
Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

Does Radio Advertising Influence the Buying Decision

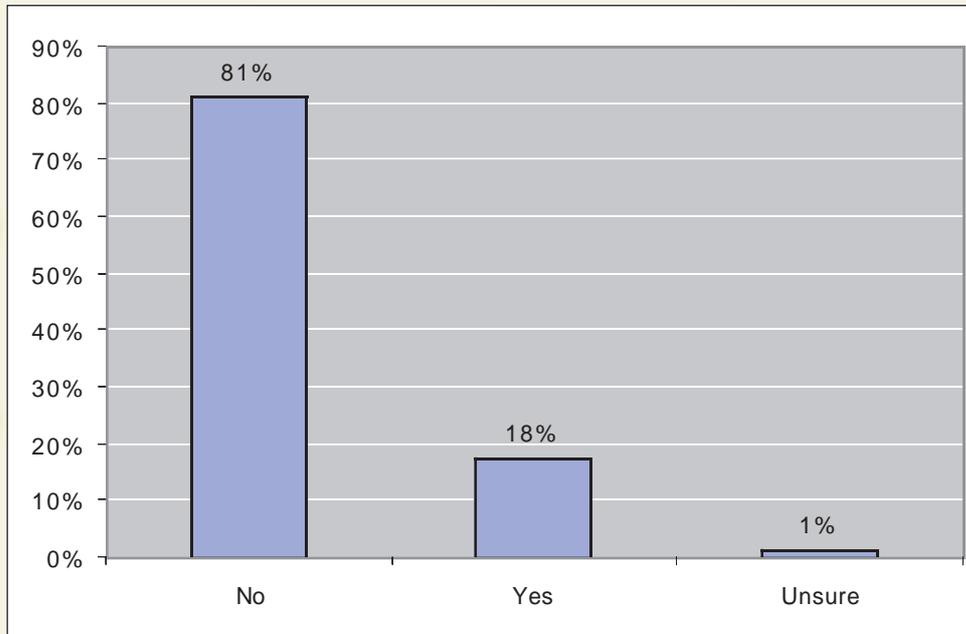
18% of Consumers say that Radio Advertising influences their purchasing decisions.

This figure is similar to the 14% of Consumers who say they purchase as a result of Radio Advertising as detailed later in this document.



Radio Advertising

Does It Influence the Buying Decision



YES

- I listen to radio all day at work
- They've got me captured driving around all day
- I enjoy radio ads and I am definitely influenced by them

NO

- I tune out to radio ads
- I only listen to non-commercial radio
- I try not to be influenced by ads

UNSURE

- I don't think so but I could be
- I don't know
- Who knows

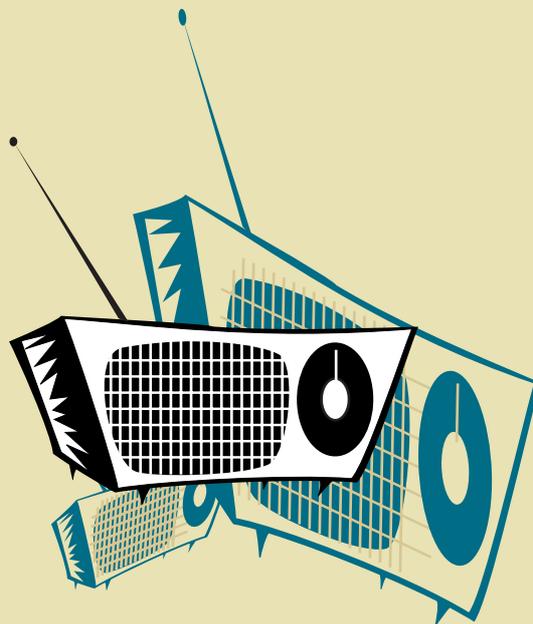
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

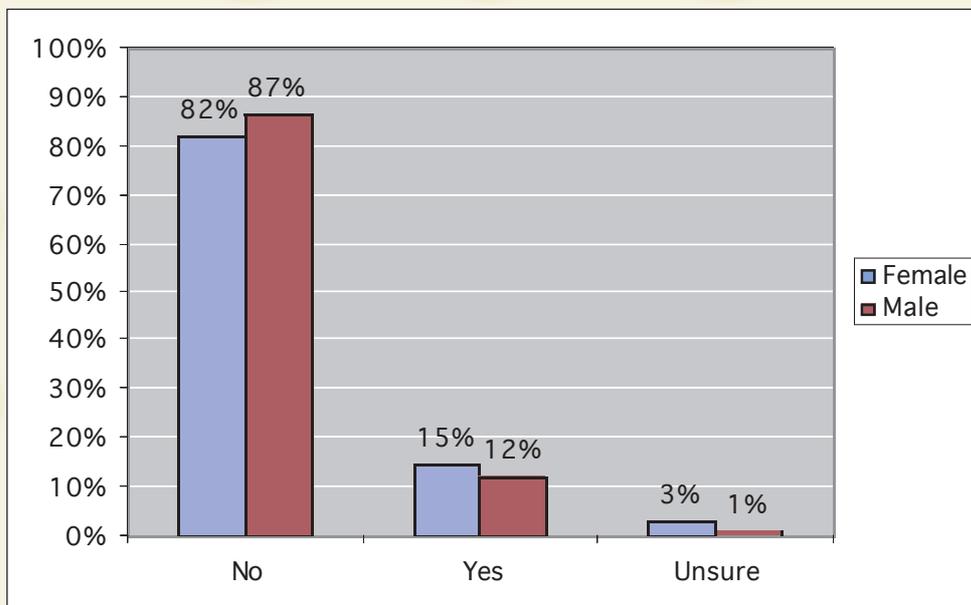
What Percentage Consumers Purchase as a Result of Radio Advertising

15% of female and 12% of male Consumers say they purchase as a result of Radio Advertising.



Radio Advertising

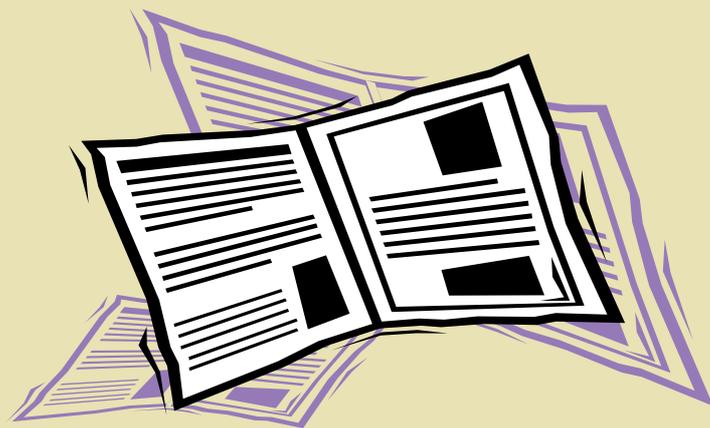
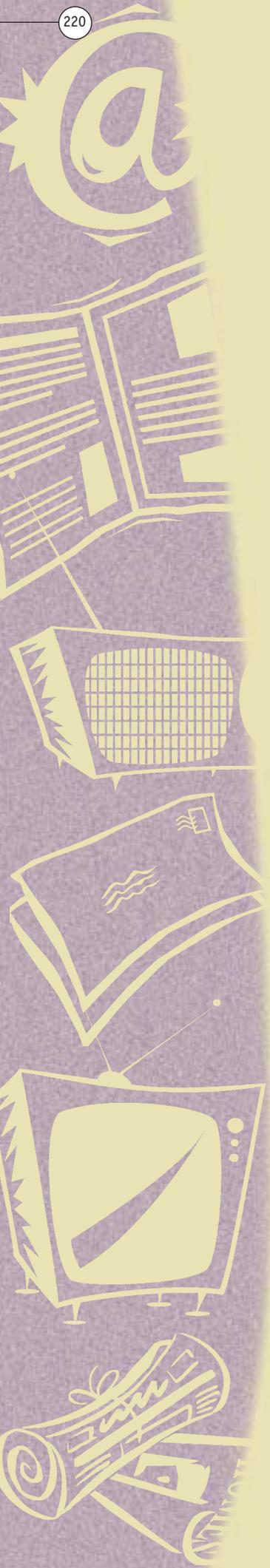
What Percentage of Consumers Purchase as a Result of It



Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia



Newspaper and Magazine Advertising



Marketing Media in Australia



Newspaper and Magazine Advertising - An Overview

Consumers

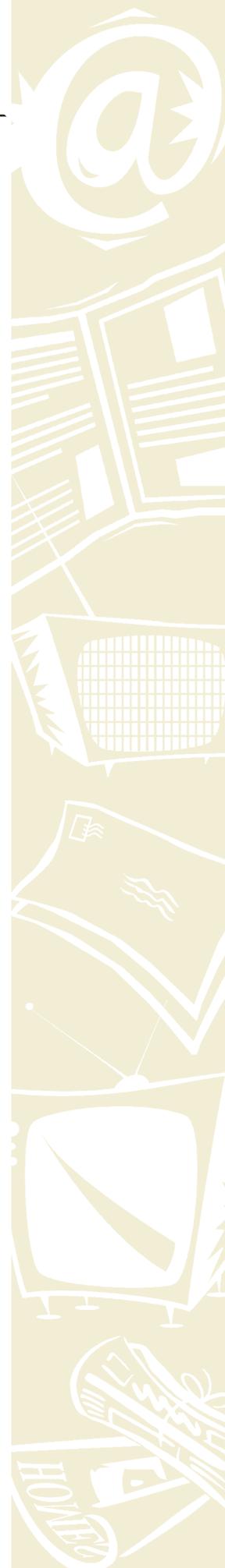
57% of Consumers enjoy or are indifferent to Newspaper and Magazine Advertising

81% of Consumers can nominate an element of Newspaper and Magazine Advertising that they like

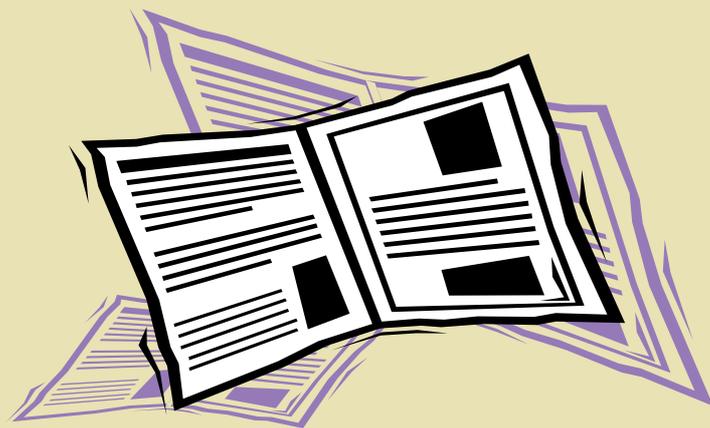
48% of Consumers can nominate an element of Newspaper and Magazine Advertising that they don't like

61% of Consumers say that Newspaper and Magazine Advertising influence their purchasing decisions

55% of Consumers say that they purchase as a result of Newspaper and Magazine Advertising



Marketing Media in Australia



Newspaper and Magazine Advertising - What Consumers Think

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- What Consumers Don't Like About Newspaper and Magazine Advertising 231
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Marketing Media in Australia

Do Consumers Enjoy Newspaper and Magazine Advertising

57% of Consumers enjoy or are indifferent to Newspaper and Magazine Advertising.

Once again, there is little difference in the attitudes of male and female Consumers in regard to enjoying Newspaper and Magazine Advertising.

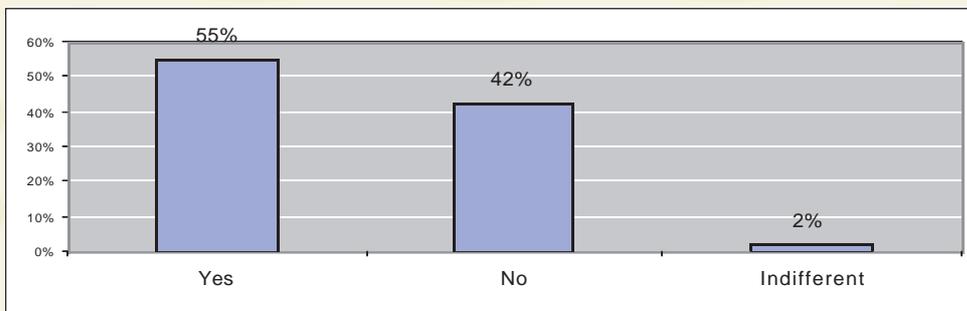
The 25-34 age group most enjoys Newspaper and Magazine Advertising.

The \$75-99K income bracket most enjoys Newspaper and Magazine Advertising.

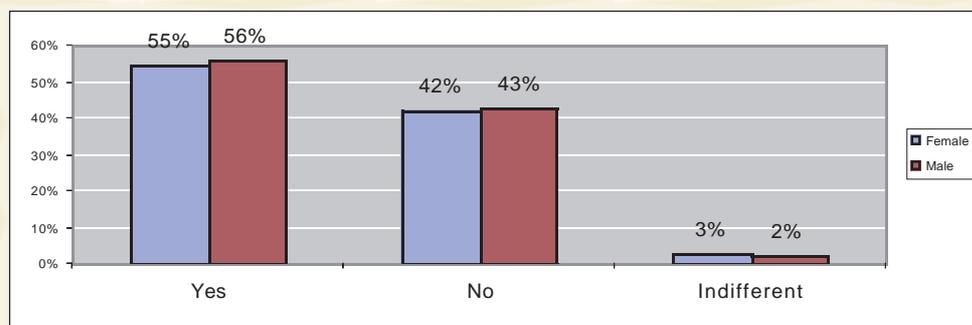


Newspaper and Magazine Advertising

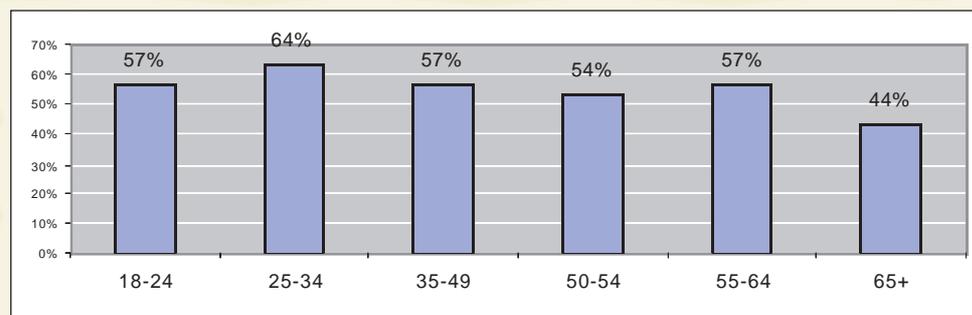
Do Consumers Enjoy It



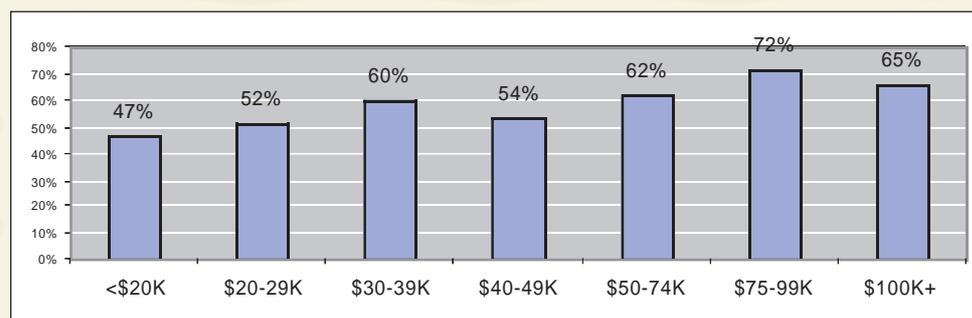
By Sex



Yes - By Age



Yes - By Household Income



Base: Graphs 1 & 2 = Sample = 1,100. Graphs 3 & 4 Sample = 604.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Like About Newspaper and Magazine Advertising

81% of Consumers can nominate an element of Newspaper and Magazine Advertising that they like.

The main reasons that those Consumers like Newspaper and Magazine Advertising are that it is seen to provide useful information, it can be either read or ignored and the fact that it can be viewed at a time of the Consumer's choosing.



Newspaper and Magazine Advertising

What Consumers Like About It

APPEAL	COMMENTS	%
Other	Well presented Less intrusive Indifferent Variety	37
Nothing	Try to ignore them Absolutely nothing Don't read ads Hate them	19
Information	Exposure to new products and services A lot of information about products Awareness of new products Gives all the information	18
Choice	Choose to read it or not Can skip over or read Don't have to read it Easy to ignore	11
Timing	Can read it later and not in your face Can cut it out and read it Can read it at my leisure Can take it with you	10
Visuals	Good usage of colour Colourful pictures Colourful ads Colourful	3
Convenience	Compares prices and quality Can shop from home Can read in detail Can skim easily	2

Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

What Consumers Don't Like About Newspaper and Magazine Advertising

48% of Consumers can nominate an element of Newspaper and Magazine Advertising that they don't like.

The main reasons that those Consumers dislike Newspaper and Magazine advertising are that they believe there are too many ads and they take up too much space, especially in Magazines. Some believe the ads are repetitive and/or misleading.



Newspaper and Magazine Advertising

What Consumers Don't Like About It

APPEAL	COMMENTS	%
Nothing	There's nothing I don't like about them I don't have to read them They're easy to ignore Can't say	52
Other	Too many boring ads Ads without pictures Don't like large ads Sexist media	20
Too Many	Magazines are ads with a bit of news thrown in More ads than there is news Just too many of them They're on every page	18
Space	Takes up all the good reading space More and more space going to ads Dominates magazine space Takes up most of magazine	6
Repetitive	It's always cars at the front and perfume at back It's always the same advertisers They're the same each week Repetitive and misleading	2
Misleading	They don't tell the full story Misleading and ambiguous Beware the fine print Unrealistic promises	2

Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

Does Newspaper and Magazine Advertising Influence the Buying Decision

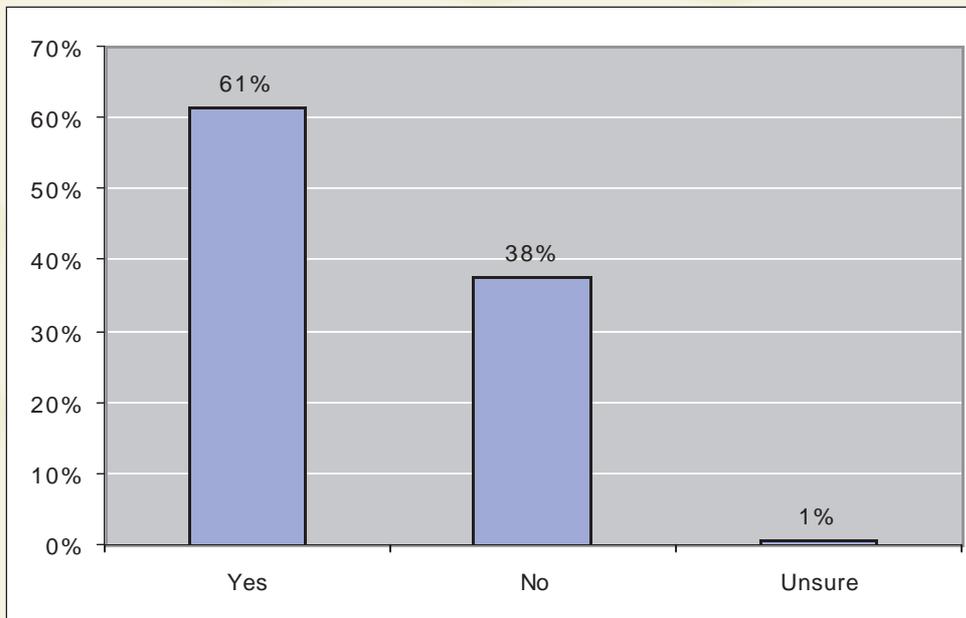
61% of Consumers say Newspaper and Magazine Advertising does influence their buying decisions.

This figure is similar to the 55% of Consumers who say they purchase as a result of Newspaper and Magazine Advertising as detailed later in this document.



Newspaper and Magazine Advertising

Does It Influence the Buying Decision



YES

I bought a coffee maker recently that I saw in a magazine
 The ads are the best bits of newspapers and magazines
 I buy them mainly to study the different ads for cars

NO

The Sunday magazines are all the same
 I buy the papers to read the news
 Don't look at the ads

UNSURE

I read the papers every day so I may be influenced by the ads
 I don't think I take that much attention to the ads
 Maybe they do maybe they don't

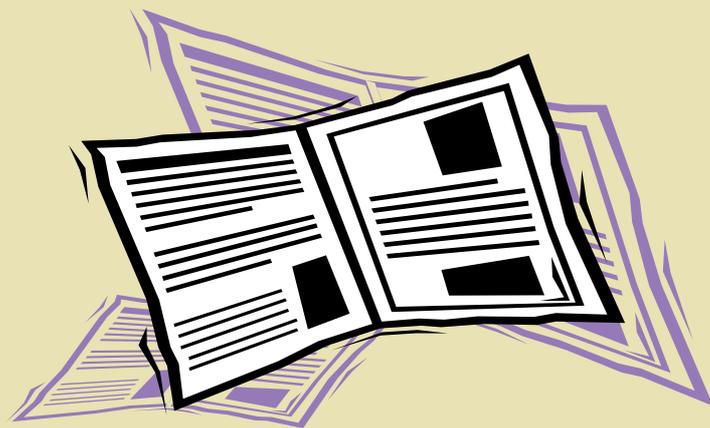
Base: Sample = 1,100.

Source: ResponseAbility Consumer Research 2001.

Marketing Media in Australia

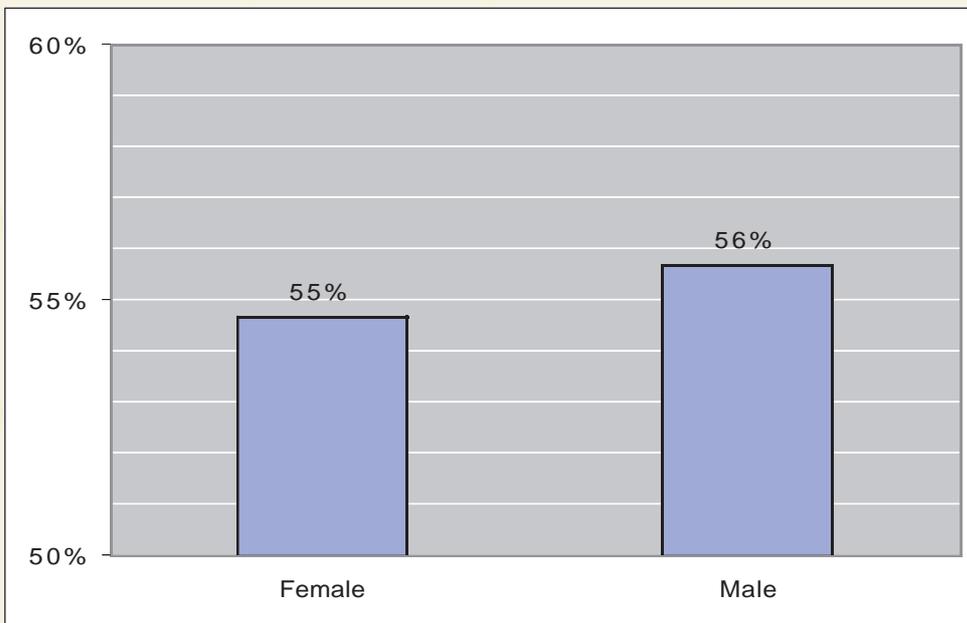
What Percentage of Consumers Purchase as a Result of Newspaper and Magazine Advertising

55% of Consumers say they purchase as a result of Newspaper and Magazine Advertising.



Newspaper and Magazine Advertising

What Percentage of Consumers Purchase as a Result of It



Base: Sample = 594.

Source: ResponseAbility Consumer Research 2001.

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Survey Details

The results and findings of this report are the outcome of research conducted using a combination of focus groups, face-to-face interviews and quantitative telephone interviews. The details of this research are provided below.

Focus Group Research

The focus groups included five consumer groups made up of males and females, aged 18-70, with a mix of both white and blue collar and full time and part time workers.

The five business focus groups involved small to medium sized business owners/managers, large business managers and personal assistants. There were eight people in each group.

Face-to-Face Interviews

A total of 50 in-depth face-to-face interviews were conducted in two Australian capital cities and two regional areas. The outcomes of both the focus group research (see above) and the face-to-face interviews were used to determine the questionnaires for the quantitative telephone research.

Quantitative Telephone Interviews

The telephone research examined the attitudes of Consumers, Business Senders, Business Receivers, and Gatekeepers and Personal Assistants to various media.

The 1,100 Consumer surveys completed were conducted in the following areas and in the following numbers around Australia:

New South Wales	200
Victoria	200
Queensland	200
South Australia	100
Western Australia	100
Tasmania	100
Northern Territory	100
ACT	100
Total	1,100

The Business surveys were conducted with the following people and in the following numbers:

Title	Sydney	Melbourne	Geelong	Total
Managing Director	25	20	5	50
General Manager	25	20	5	50
Operations Manager	25	20	5	50
IT Managers	25	20	5	50
Purchasing Managers	25	20	5	50
Owner/Manager	25	20	5	50
Marketing Managers	25	20	5	50
Other Title	25	20	5	50
Personal Assistants	25	20	5	50
Receptionists	25	20	5	50
Total	250	200	50	500



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Volume 1

A ResponseAbility Report

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