

***INCITE***



# INCITE

## ABOUT THE COVER

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Sink your teeth into our latest issue! Since 1986, Costco has maintained the price of its famous hot dog combo at \$1.50. From the C Suite to the warehouse floor, it's seen as a symbol of the retailer's commitment to value for its members.

On pg. 15, Costco taps into direct mail to help meet its biggest challenge – its own success.

Canada Post plays an important role in protecting the environment today and preserving it for future generations. *INCITE* follows in those lighter footsteps by producing this magazine using sustainable materials. We are pleased to present this issue on FSC-certified Sustana EnviroSatin™ paper, containing 100% sustainable recycled content. *INCITE* is mailed with an envelope and letter printed with vegetable-based inks on 100% recycled paper.

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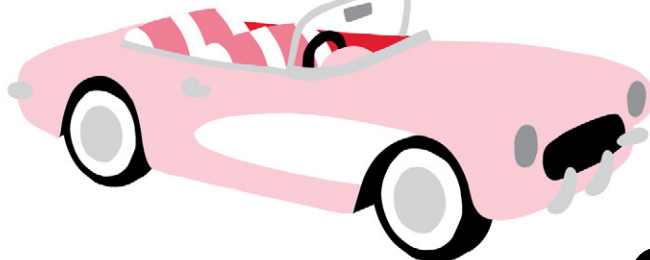


28,000 kg of non-methane volatile organic compounds (NMVOC)

Source: <https://sustanasolutions.com/eco-calculator/>

This issue of *Incite* was printed at Lowe-Martin, recognized at the 2023 Canadian Printing Awards as Canada's Most Environmentally Progressive Printing Company.

# THE MEDIA + COMMERCE ISSUE



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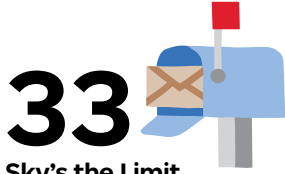
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## INCITING ACTION: MEDIA + COMMERCE



**W**hen navigating the ever-evolving landscape of advertising and commerce, one thing becomes abundantly clear: The lines between the two are blurring.

Amid this change, holistic marketing strategies and integration of channels, content and brand experience are becoming imperative. Every advertisement is seemingly now a gateway to ecommerce possibilities, fundamentally altering the dynamics of traditional advertising.

In this issue, we delve into the evolving world of commerce media.

Dana Toering provides invaluable insights into how retail media networks are reshaping the very fabric of the media landscape. Meanwhile, Lina Kim shares her expertise on maximizing the potential of new media, offering practical advice for marketers looking to leverage these new channels. Nick Moretta offers a hopeful beacon for those grappling with reconciling brand and performance marketing amidst budget constraints.

We also explore the myriad facets of commerce media, shedding light on where direct mail fits into this evolving landscape and its role as a vital plug in the proverbial leaky bucket. To underscore its significance in the media mix, Patrick Collister takes us inside Sky TV, revealing lessons on the enduring value of this often-overlooked channel.

And let's not forget our latest case study, which offers a tasty glimpse into Costco's unwavering commitment to value – enter the hot dog on our cover. Discover how this retail giant uses direct mail to navigate the challenges posed by its own success.

Ensuring effectiveness in every facet of our marketing endeavours to overcome ad deficiencies will require a holistic look at budgets as we traverse 2024.

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# ADAPTING LIKE BARBIE

*The convergence of advertising and commerce is good for the brand-consumer relationship.*

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## Key Takeaways

Commerce media comes in myriad forms suitable for any brand.

Gone are the days of winning with one-way advertising.

Commerce media thrives on interactive and experiential content.

Like Barbie, the iconic brand that has adapted beautifully to changing times, commerce media has morphed from traditional advertising methods, transforming how brands engage with consumers.

Purely passive and one-way advertising constructs that don't connect to commerce are fading. Likewise, consumers expect fluid content-to-conversion interaction across online and offline channels. Plus, the technology connects advertising impressions to conversion – and that's no small thing for marketers.

### A BARBIE FOR EVERYONE

Commerce media, much like Barbie herself, comes in a myriad of forms tailored to fit a brand's needs – from direct response TV, retail media network ads, QR-enabled direct mail catalogues and affiliate marketing to cutting-edge live-stream shopping and smart device interfaces.

What all commerce media have in common is the ability to connect advertising to conversion. It's not just about driving purchases; commerce media spans the entire consumer journey, seamlessly integrating online and offline touchpoints to create a cohesive brand experience. It thrives on experiential formats that foster deeper connections and resonance with consumers, and it uses first-party data to connect transactional retail data to audience targeting.

Commerce media has its roots in direct response media, affiliate models and ecommerce.

## “Just as Barbie continues to reinvent herself, brands can leverage commerce media to create immersive brand experiences that captivate audiences and drive real business results.”

Unpacking this arena of media is reflective of more than digital transformation maturity, new ad tech and data utility opportunities. It also reflects a mature consumer marketplace where audiences demand more from how advertising is delivered as they are increasingly bombarded with interruptive ads that take away from content enjoyment. And it reflects a mature ecommerce landscape where people want shopping to be less transactional.

Commerce media naturally reflects the next evolution of ecommerce – disaggregating from a singular scroll-and-click destination. Ecommerce is becoming embedded in brand experience across channels and environments of interaction. It feels less like the convergence of advertising and commerce and more like advertising being replaced with brand content that is interactive, entertaining and shoppable.

### SHINY BARBIE

Despite the term *commerce media* being used interchangeably with *retail media*, retail media is only one type of commerce media – albeit the format that is stealing the

spotlight, leveraging first-party data to deliver targeted messages and drive sales. Brands like Amazon and Walmart are reshaping the advertising landscape with retail media networks (RMNs).

Over the last few years, getting efficient reach, let alone efficient growth, has become harder – making retail media look shiny. According to the 2022 *IAB Canada Internet Ad Revenue Survey*, retail media experienced remarkable growth in 2022, increasing by 26% to reach \$982 million in Canada. This growth spurt establishes retail media as one of the fastest-growing segments in digital marketing. Its impact on search, display and video advertising revenues has also been significant. Amazon Ads, Walmart Connect, Loblaw Advance, Best Buy Ads and Home Depot Retail Media+ are just some examples of RMNs available in Canada.

Retail media capitalizes on first-party data and uses transactional data to gain shopper insights, improve targeting, deliver relevant messages and (most importantly) connect paid impressions to online and offline sales. A recent report by McKinsey states that

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## SHOPPERTAINMENT

Barbie always makes it entertaining. Behind the race for scale that's driving ad dollars toward RMNs, there's a more nuanced commerce media story unfolding that's contextual and experiential. Enter “shoppertainment” – a fusion of commerce, content and community that's revolutionizing the advertising playbook. From augmented reality integrations to gamified experiences, brands are turning shopping into entertainment.

The interest in shoppertainment from brands has been fuelled by several trends and market conditions coming together related to technology, consumer expectations for an omni-channel experience, and a mature ecommerce environment where ad interruption is being turned off in favour of more frictionless and interactive content formats.

Shoppertainment is finding its biggest growth in the U.S. and the Asian markets right now. And, not surprisingly, it's attracting younger, digitally native audiences first. But shoppertainment can

be applied successfully for any generation or category, whether B2C or B2B, by understanding their content needs and relevant formats for engagement. After all, boomers and Generation X experienced The Shopping Channel (TSC) and infomercials in the '80s and '90s. Older generations are getting used to tablet interaction, apps and telehealth. Through major publishing outlets like *The New York Times* and *Livingetc*, they're already engaging in affiliate marketing. Brands like IKEA, Netflix and LEGO have all proven that shoppertainment isn't just for “the kids.”

## “Like Barbie, the iconic brand that has adapted beautifully to changing times, commerce media has morphed from traditional advertising methods, transforming how brands engage with consumers.”

RMN ad performance is proving to be three to six times better compared to current performance marketing returns.

While the aim is ultimately to connect brands to retail experiences, retail media networks are still young and have their growing pains. RMNs started with monetizing eyeballs, then turned to data insight and now to media and measurement standardization. These new media publishers are still figuring out data, ad standardization across platforms, and measurement, as well as ensuring inventory and placements are full funnel across digital and physical retail environments. IAB Canada, The Trade Desk

and the Media Rating Council are working closely with RMNs to address these challenges.

RMNs bring a lot to the table. However, McKinsey advises, “Don’t lose sight of the big picture. Although RMNs present opportunities to drive growth, it’s essential to evaluate ad spending holistically. Marketing should be assessed and optimized across brand, trade, shopper marketing and traditional media.”

### WEIRD BARBIE

Programmatic display, third-party cookies, social media and retail media are taking larger bites from media publisher revenues.

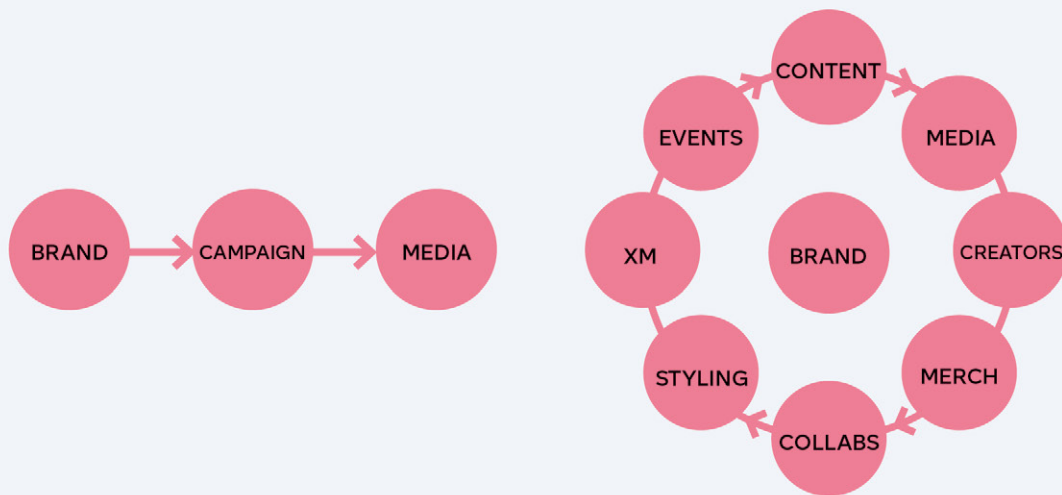
Media publishers are embracing commerce, blurring the lines between content and commerce to captivate audiences and deliver unique brand experiences.

They are adapting, finding opportunity in what walled gardens and platform players cannot do – contextually reflecting people’s identities, values and unique vertical interests. If RMNs are commerce media corporate, media publishers have permission to be commerce media “weird.”

As RMNs are learning to become media publishers, media publishers are learning to double down on their unique qualities and expertise – adding commerce flair through curation, editorial affiliate models, collaborations, premium subscriptions, experiential activations and events. According to Digiday, media publishers are fielding more RFPs for experiential offerings in 2024 than in recent years as advertisers look to connect with vertical audiences in more engaging,

## BRAND BEING

Barbie is all about being a brand. Ana Andjelic, author of *The Business of Aspiration*, describes this state of being as “less about communicating (just) the brand identity and values and more about activating this identity and values as a consistent, encompassing, and entertaining brand world that people aspire to be part of and identify with.” The brand is used as an operating system, creating an interconnected world of ways for people to relate to, experience and be empowered by the brand. The approach is culturally fluid, connecting meaning across an interplay of brand expressions, experiences and content formats, both online and offline.



Source: Adapted from *The Sociology of Business*, 2023



exclusive and community-oriented ways (translation: in ways that are also valuable to audiences).

Media publishers are taking charge of their first-party data, creating direct value for advertisers and their audiences. By investing in digital platform capabilities, publishers are well positioned to provide media opportunities to highly engaged audiences and help advertisers dip into the upside of commerce media.

Publishers are finding entertaining ways to bring content, community and commerce together without interruption. Examples include in-app augmented reality integrations, live commerce feeds, affiliate content curations, gamified experiences, micro-communities led by influencers, and experiential activations and events converging online and offline.

## MAKEOVER BARBIE

Barbie's marketing makeover offers a blueprint for brands to navigate the evolving landscape. Barbie demonstrates the effectiveness of creating a brand ecosystem that resonates culturally, emotionally and socially. Yes, Barbie had a lot of money invested in brand marketing, including a movie, but it's the marketing approach that offers guidance, not the investment.

Barbie's blueprint reflects how brand marketing is changing. The new brand marketing playbook requires building an ecosystem that's demonstrative of the brand across all touchpoints. It emphasizes creating a value exchange between brands and people over traditional paid advertising communications – the "throw it all at a 60-second anthem TV spot" comes to mind.

Interbrand frames the changing landscape through what it calls "iconic moves." It reminds us that brands have become complex systems with which we have an aesthetic, functional, emotional and even moral individual relationship. Barbie has perfectly embodied the following imperatives (as outlined in Interbrand's 2023 *Best Global Brands* report) of brand-driven commerce that ultimately drive consumer choice.

**Be empowering:** The leadership imperative states that if brands are the most trusted institution, they are also the world's most powerful narrative – and with great power comes great responsibility. Brands are no longer expected to just follow the rules but to lead on standards. Barbie won by challenging itself, creating new rules and asking the question, "What was I made for?" The brand has renewed its meaning and cultural status among women and girls everywhere.

**Be pink-core:** The identification imperative says to focus on a small set of brand codes that are memorable and flexible. It's all about being true to yourself. On a purely visual level, Barbie is easily recognizable, reinforcing the Barbie aesthetic at every opportunity – even in the wardrobe of the movie's actors at every event appearance.

**Be your own best friend:** The asset imperative says to start thinking of your brand as what the business should look like – its operating system. Barbie is the brand; the brand is the business. Barbie is in the driver's seat, adeptly reinforcing its ethos and mythology. Mattel leads with its brands to drive business and doesn't let the business get in the way (as it did in the past).

**Don't be put in a box:** The experience imperative dictates that great brands shift expectations. Barbie did this by having its existential crisis in public. Barbie memes, experiential activations (like life-sized Barbie dreamhouse pop-ups and Barbie-box photo booths) and the limited-edition Weird Barbie are just some ways people could feel part of the Barbie world.

**Be a Barbieland:** The ecosystem imperative emphasizes that data, technology, channels and partnerships come together to create a world of touchpoints, products, services and experiences that "productize" the brand. Barbie reached peak Barbie-core by using an interconnected brand marketing approach that was dimensional, dynamic and personalized.

## IT'S A BARBIE WORLD

In the converging landscape of advertising and commerce, brands must adapt and innovate to stay relevant. Just as Barbie continues to reinvent herself, brands can leverage commerce media to create immersive brand experiences that captivate audiences and drive real business results.

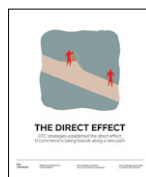
Living in a Barbie world takes adapting to. But, as Barbie has shown, you can have it all. ■

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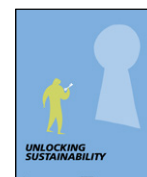
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# UNBOXING COMMERCE MEDIA

Commerce media (where advertising meets ecommerce) has gained popularity as ecommerce continues to grow and brands seek more effective ways to reach consumers while shopping. Today, there's a growing spectrum of commerce media options to explore.

From transactional to experiential, reach-based to direct, we are witnessing a shift from media impressions to models crafted for consumer interaction and conversion.



## RETAIL MEDIA NETWORKS (RMNs)

Ecommerce maturity. Media fragmentation. First-party data. Mounting pressure to translate marketing budgets into short-term sales. These are all factors in the growth of RMNs – ad platforms set up by retailers (like Walmart Connect) that enable brands to buy media impressions across a retailer's assets (online, on mobile and offline).

Fueled by the retailer's transactional data, these networks get brands closer to shoppers ready to buy with relevant advertising. These networks are challenging traditional advertising infrastructure, evolving performance marketing and providing new opportunities to connect media impressions to conversion.



## SOCIAL COMMERCE

The boundaries between socializing and ecommerce are blurring as users discover, discuss and purchase products directly within the social media environment. Social commerce leverages the social aspects of online interactions to drive and influence purchasing decisions. The increasing commercial clutter in our feeds, however,

is shifting social commerce models toward a mix of membership, affiliate and subscription to strike a better balance between content and commerce. The resale economy provides examples of how social commerce is evolving toward community commerce.



## OPT-IN COMMERCE

A subscription model's success is based on connecting people to valuable content (blogs, newsletters and podcasts), offers, products/services and community. Increasingly, influencers, bloggers and experts are moving offer codes behind closed doors and monetizing content through freemium models and exclusive access. While these models

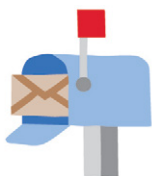
aren't new, they are becoming part of the social commerce toolkit to increase engagement, reduce commercial focus and maintain content value. Opt-in commerce models are also taking off in the B2B space as business shoppers increasingly want more self-directed ways to engage with content and B2B brands need to segment audience experience.



## LIVE COMMERCE

Live commerce brings the principles of direct response media, ecommerce and real-time buying into the connected era. Particularly popular in Asia, platforms like Taobao have seen significant success by combining instant purchasing of a featured product with audience participation through a chat function or reaction buttons. Live-streaming video, or "shoppable TV", combines entertainment, editorial and/or demonstration.

People can interact with video content and buy products directly from their TVs or device screens. As we try to digitally recreate the in-real-life shopping experience (digital twinning), live commerce is growing to include in-video-game and metaverse experiences and purchases. Brand apps and technologies like AR and VR could change ecommerce interaction and blur the line between in-store and ecommerce shopper experience.



## DIRECT MEDIA

Direct media is enhancing consumer engagement, delivering content and offers, and managing the customer experience in ways that are intimately connected to people's daily in-home and on-the-go moments. Direct mail is the original addressable, shoppable conversion channel. Aided with technology that improves omni-channel connectivity (like QR codes), it brings content, interaction

and shopping together. Through data and digital integration, direct mail targeting is scalable and precise, programmatically responsive and tangible. Smart devices can provide low-friction digital conversion through tactics like audio and short codes, voice activation, SMS, search and geofencing.



# SURFING THE WAVE

*By Dana Toering*

*The cresting third wave of marketing is brimming with opportunities for brands brave – and agile – enough to ride it.*

For the modern-day marketer, the timeless wisdom of the Greek philosopher Heraclitus resonates profoundly: Change is the only constant.

Now, in a whirlwind era of rapid technological advancement, these words echo louder than ever, especially for those navigating the modern marketing landscape.

It all began with a pivotal moment in 1994. That's when the first banner ad graced the screens of HotWired users, forever altering the course of marketing. Since then, a relentless surge of innovation has propelled marketers into a world of diverse platforms, devices, screens and formats, challenging them to connect with their audience effectively across more channels and environments.

Fast-forward six years to October 23, 2000, when Google unleashed its game-changing AdWords platform, revolutionizing how marketers tap into consumer intent. Subsequent milestones followed:

- Facebook's emergence in February 2004,
- Netflix pioneering streaming services in January 2007,
- Amazon monetizing its audience through ads in 2012,
- the launch of TikTok in September 2017.

The pace of change is staggering, and attention spans are fleeting. To thrive in this environment, marketers must fortify their strategies to weather the storms of innovation and build foundational new models for the future.

Reflecting on the past 30 years, we can discern three distinct waves of transformation that have shaped the marketing landscape.

The first wave, during the nascent stages of the open internet's rise, saw the dominance of static banner ads and email campaigns as primary tools for online engagement.

The second wave arrived with the 2000s, characterized by the emergence of search-engine marketing and the strategic use of keywords to drive website traffic. Social media platforms, spearheaded by Facebook, offered new avenues for brand-consumer

## **“The pace of change is staggering, and attention spans are fleeting. To thrive in this environment, marketers must fortify their strategies to weather the storms of innovation and build foundational new models for the future.”**

interaction, heralding an era of relationship-focused marketing.

Now, we find ourselves immersed in the third wave, where retail media reigns supreme.

When we talk about retail media, we're talking about advertising and promotional content displayed within a retailer's digital or physical store environments. That means everything from product displays and in-store signage to sponsored social media posts and targeted ads on the retailer's website or app.

Within this third wave where retail media reigns, smart brands prioritize personalized, relevant and engaging consumer experiences across diverse channels and devices. Data-driven targeting, programmatic advertising and advanced analytics define this wave, alongside a shift toward mobile-first strategies and heightened emphasis on transparency and data privacy.

Retail media seamlessly integrates digital media, retailer data, analytics and creative content to deliver immersive shopping experiences and foster customer loyalty. Brands leverage targeted advertising and interactive content to engage customers both online and in store, capitalizing on retail media's potential to reach audiences with unprecedented precision and scale.

In the daily lives of consumers, retail media appears as a seamless part of their shopping experience. For example, they may see a sponsored post on Instagram for a product available at their favourite retailer, or receive personalized recommendations for products while browsing the retailer's website. In store, they may notice eye-catching displays or signage promoting certain products or deals. Overall, retail media is designed to capture consumers' attention and drive them to make purchases within the retailer's ecosystem.

Yet, amidst these waves of transformation, one truth remains immutable: The marketing ecosystem is in perpetual flux.

As Roman Emperor Marcus Aurelius observed, obstacles become pathways to progress. Marketers need to adopt this mindset and embrace complexity, demographic shifts and media disruptions. Thoughtful, data-informed marketing strategies will drive growth, delivering superior audience access and enhanced customer experiences, and the time to act is now.

Coca-Cola Global Chief Marketing Officer Manolo Arroyo attests to this shift, emphasizing the power of digital segmentation over traditional TV-centric models: *“In our prior model, it was a TV-centric model where we would basically achieve high-reach levels, 80-90% population. In the new model, we have embraced the power of digital segmentation, allowing us to really focus our dollars in a much more targeted and strategic way.”*

Coca-Cola no longer wants to simply out-spend its competition. It understands the world has changed, and there are more effective ways to deliver business outcomes and connect with customers with the right message, in the right place and at the right time.

As brands pivot toward personalization and sophistication, retail media emerges as a linchpin for success. Transitioning from mass reach to personalized engagement, from static planning to real-time adaptation, requires strategic foresight across the entire marketing organization. Marketers need to prioritize data-driven decision making, holistic investment strategies, unified team structures and robust measurement frameworks to navigate the evolving landscape effectively.

It has become increasingly clear that brands need a more effective model. Moving from a world of mass reach to personalization, from

long planning cycles to real-time marketing, from audience archetypes to verified users and from loose attribution to measurable conversions will not happen on its own. To solve current and future challenges, we need to think strategically across the entire marketing ecosystem.

Here's where you should focus to future-proof your organization.

## DATA FIRST

Microsoft CEO Satya Nadella says, "*Retail – and retailers – have the most precious asset, which is commercial intent data. What they do with it is going to define retail and their own prospects.*"

Retailers are activating data both online and in store to drive audience targeting sophistication and attributable investments. More than 9 in 10 U.S. advertisers are planning to maintain or increase their investment in retail data in the next few years, according to a recent survey from the Trade Desk. On top of that, that same study showed nearly 7 in 10 advertisers surveyed don't currently have a retail media strategy and are reportedly planning to create one in the future, meaning that simplifying the complexity around retail data is a top priority.

## END-TO-END INVESTMENT STRATEGY

According to a recent Insider Intelligence report, retail media ad spending in Canada will surge past the \$3 billion mark this year. That's almost double what it was only three years ago.

GroupM, the world's biggest media buyer, said it expects global advertising revenue from retail media channels to surpass television revenue in 2028. By that date, it predicts, retail media will represent 15.4% of total ad revenue.

Having the right investment strategy will also require a new model. Strategy and planning must become holistic. The media organization and the sales, shopper and ecommerce teams need to work together on creating an integrated briefing and planning process. Start thinking about the right KPIs that tell the full story of how your media investments impact your business. Think

beyond the CPM to what business issues you are trying to solve.

Put the retail business at the centre of your plan and ensure your merchants, sales teams and other cross-functional leaders are involved. Understanding the strengths and weaknesses of your options is key, and planning how budgets are spent should focus on measurable outcomes.

## UNIFIED RETAIL MEDIA FUNDING AND TEAM STRUCTURE

Funding from retail media tends to come from multiple sources across the organization. It's time to break down the silos and embrace a unified approach to funding your holistic media plan.

In this third wave, retail media has moved beyond shopper and trade dollars and should consider all media across the full marketing funnel. Moving away from siloed budgets helps ensure you are not underinvesting but rather taking full advantage of your sales opportunities. Embracing a holistic approach to planning allows you to access key levers across national retail and other customer connections.

As challenging as it sounds, one plan and one budget across media, trade, shopper and ecommerce will set your organization up for long-term success. Your new model will require your teams to be structured to meet the needs of this new paradigm. More touchpoints will result in more complexity, and your teams need to be connected, cross-functional and collaborative. Duplicating efforts will drive investment waste, large missed revenue opportunities and potentially bad customer experiences. There are many structural models to consider, but your organization will need to find the right stakeholder mapping model that works for the future.

## NEXT-GEN MEASUREMENT

Measurement continues to evolve at lightning speed and is a focus needed to drive the full potential of riding the third wave. Advertisers choosing where to invest dollars across their funnel, inclusive of retail media platforms, face complexity by there being little standardization across retailer websites, making performance tracking an important strategic component of success.

Furthermore, the "walled garden" nature of advertising on retail platforms tends to limit marketers' access to essential campaign data necessary for optimization, both online and offline. While this is changing quickly, aligning business objectives with media performance becomes imperative in this landscape. Brands seeking exposure and growth through retail media must prioritize benchmarking key performance indicators as they expand their reach across diverse retailer websites and beyond.

In this dynamic environment, conversion remains a constant focal point. Understanding the intricacies of multiple touchpoint attribution and incrementality along the customer journey is pivotal.

These insights play a crucial role in informing broader media mix modelling (MMM). According to a recent WARC study, next-generation MMM offers a solution to this complexity, providing agility, relevance and user-friendly analytics. It empowers marketers to identify incremental sales, isolate the impact of various media channels, uncover online and offline synergies, discern between branding and sales activation efforts and furnish robust and enduring measurements.

This is an exciting time to be a marketer. The third wave crests upon us, brimming with opportunities for those agile enough to seize them. In this dynamic landscape, agility trumps size, and there is strength in the right partnerships. Forge strong partnerships with technology, data and agency allies to navigate the complexities of this ever-evolving ecosystem. ■

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**Dana Toering**, Managing Director of Commerce Media for Nectar First (nectarfirst.com), is an experienced and accomplished executive with a growth mindset and a strong track record of scaling digital media and technology-based companies. Over his 25-year career, he has held leadership roles with Walmart Connect, Accenture, Adobe, Addictive Mobility and AOL.



# THE MARKETER'S DILEMMA

*By Nick Moretta*

*Here's how marketers can win in  
the standoff between brand and  
performance investment.*

If you're a senior marketer, life is tough. There are things that you can measure but aren't working, and then there are things you can't measure that you know are working but you just can't easily show it.

VPs and CMOs are struggling with what seems like a never-ending battle between brand and performance investments. When it comes to justifying where paid media dollars are placed, marketers are clashing in boardrooms with other members of the C-suite.

According to a recent Gartner study, 71% of CMOs feel they don't have sufficient budget to hit their business targets. So, where these dollars are invested is paramount to them. Some marketers fight to invest more in performance (an easier battle), but most are fighting for investments in brand building.

Here's the thing though: It's a losing battle, and the loser is the business. Lean in too heavily on performance and you will typically encounter a higher customer acquisition cost and hit a point of diminishing returns or volume plateau. Lean in too heavily on brand and you may not see results fast enough to continue justifying the investment.

So, what is a business to do?

Our best clients invest materially in both areas of brand and performance because, in the end, they are a single thing – a combined set of strategies and tactics that deliver results for the business. These leaders set themselves apart and their organizations up for success by ensuring internal alignment, infrastructure and resources across three key areas.

By understanding these three areas, you can become more confident in your decision making and finally put this battle to rest at your organization.

### **AREA 1: REDEFINE WHAT 'PERFORMANCE' MEANS IN YOUR MARKETING DEPARTMENT**

There is a tendency to define brand investments and performance investments in the language of specific media channels. Paid search is performance and TV is brand, right?

## **“VPs and CMOs are struggling with what seems like a never-ending battle between brand and performance investments. When it comes to justifying where paid media dollars are placed, marketers are clashing in boardrooms with other members of the C-suite.”**

Don't fall into this trap.

An alternative way to look at this distinction is outcome-based, with an outlook on time to commercial impact. Typically, a set of performance strategies and tactics yields a shorter time to commercial impact with incremental gains, and a set of brand strategies yields a longer time to impact with exponential gains. But that's not always the case.

Looking away from specific channels and toward both short- and long-term business objectives ensures you and your teams don't get trapped in a channel or tactical box when you need to deliver an outcome for the business.

Let me share with you a quick example. One of our financial services clients is running an always-on “performance” program. Their North Star objective was a lead target, and they were pacing behind. We had already helped them significantly cut their cost per marketed lead and drive up volume with their performance channels of paid search and paid social.

The only issue? It was an aggressive target, and these channels, with all their penetration and engagement, were reaching a point of diminishing returns.

The solution? The company looked to what are typically categorized as “brand” channels – in this case, radio and out-of-home – to deliver short-term results. After three to four weeks in market, the lead target issue was a thing of the past – at least for now.

At the end of the day, performance is whatever will deliver the results you need, when you need them.

### **AREA 2: ENABLE YOUR PEOPLE TO MOVE BUDGET TO WHERE IT'S NEEDED, WHEN IT'S NEEDED**

In marketing departments, defining clear budgets is critical to ensuring effective and responsible allocation of funds. Giving your team direction on the budget is important, but creating something overly structured and rigid is likely holding your organization back.

So often, marketing leaders and teams sit down at the beginning of a year and allocate budgets to certain brand-building and performance activities – grappling with where to put dollars. Predetermining budgets can help to ensure these sets of activities are funded appropriately, but they don't take into account the changing needs of the business.

I've seen firsthand how a lack of fluidity in budgets can keep a business from driving immediate commercial impact at a time when the organization was significantly behind their revenue target. The reason? There wasn't enough budget allocated to performance initiatives that year and, as a result, a significant opportunity was lost (to competitors, by the way).

To your director or marketing manager, strict budget management is a job well done. To you, reporting to or with an active seat on the C-suite, strict budget management is a disaster.

This commonly happens due to a disconnect between marketing team members and the financial needs of the business (typically revenue growth, EBITA or a combination of the two).

This is why it is critical to empower your people with fluid budgets and ensure they are up to speed on the real business

objectives as they change in real time. This is key to using brand and performance investments in harmony, rather than constantly trying to steal from one to fund the other to the detriment of the business.

*But, you say, the CEO is demanding more leads, more ecommerce sales or more traffic! How could I have a brand budget left after all these demands?*

Another important mechanism is setting minimum spend thresholds for each set of brand and performance initiatives at the beginning of the year. This ensures that, despite the needs of the business in the short term, the fluidity of the overall budget doesn't starve one area for short-term gain and hurt the overall business in the long term. The best time to do this is when presenting the concept of a fluid budget to the C-suite, helping them understand that no matter where money moves, there will always be a minimum threshold supporting certain activities.

### **AREA 3: REMEMBER THAT CREATIVE IS A DRIVER OF PERFORMANCE**

We are entering a creative renaissance, a moment in time when marketers begin to value creative highly. The past 5 out of 10 years have pulled many marketers' attention away from creative and toward media as a business performance driver.

Google and Meta now account for 59.6% of digital ad spend in Canada. Keep in mind that 7 out of every 10 media dollars is spent on digital. These two platforms even reached a peak of 70% in 2020, which drove much of this focus away from strong creative and toward the power of platform targeting.

This all happened rather quickly because these platforms drove exceptional, measurable results. Marketers flocked to them for the ability to make an impact quickly, and the rest is history – or maybe not.

With the influx of aggressive marketers, major privacy changes and new AI-driven algorithms, the approach to generating results from these platforms has now changed. The ability

**“In marketing departments, defining clear budgets is critical to ensuring the effective and responsible allocation of funds. Giving your team direction on the budget is important, but creating something overly structured and rigid is likely holding your organization back.”**

for an agency or marketer to target on a granular basis has been significantly reduced.

And guess what has become exceptionally important? Creative.

Many marketers understand the value of strong tactical creative, but I'm willing to bet that, in most minds, creative is the realm of brand. The key here is to understand that sometimes we focus far too much attention on the endless metrics of media and not enough on creative. Even within creative, we spend much of our time focused on its impact on the brand, but we sometimes forget how a simple call to action on a powerful spot can make a difference.

The most successful leaders value creative highly and treat their creative campaigns, much like their media investments, in a balanced and complementary way. Every piece of creative work can perform, and everything that performs can generate a positive impact on brand building.

### **BRINGING IT TOGETHER**

Brand and performance investments are not distant cousins; they are important partners, both of which offer strategies and tactics to deliver results for the business. The more the two are at odds, the worse the business outcomes will be.

Effective leaders understand this and set up their organizations for success by:

1. clearly defining the important synergy between brand and performance within their organization and aligning resources and vision;
2. enabling their teams with fluid budgets that help address short-term needs while setting up minimum thresholds to protect long-term priorities; and

3. helping their teams understand that creative is not to be undervalued, but rather is something that must work to lift both the brand and business results.

Where your business is in its life cycle, the market conditions you are navigating and your internal organizational conditions will all constantly try to knock you off course in this quest for harmony. But, if you ensure these three areas are taken care of, you have a great shot at unlocking the benefit and business results of a truly holistic approach. ■

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**Nick Moretta** is one of three founding partners at Other, Canada's pre-eminent performance marketing firm on a mission to redefine excellence in advertising through enhanced quality, complete transparency and an unwavering accountability to business results. Visit Other. at [weareother.ca](http://weareother.ca) or contact Nick at [nick@weareother.ca](mailto:nick@weareother.ca).



# CASE STUDY

*Retention-acquisition power of direct mail helps Costco meet its biggest challenge – its own success.*

## A LEAGUE OF ITS OWN

In 40 years, Costco has grown into a global retail powerhouse – the No. 5 retailer in the world with 848 warehouses in 14 countries generating CAN\$293 billion in revenue in 2022 alone.

Since its debut in Canada in 1985, the company has become the country's No. 2 retailer, with 108 locations. Costco's unique warehouse business model offers a variety of products and services, including grocery, clothing, optometry, pharmacy, home furnishings and travel, to its more than 10 million members.

As the retailer has discovered, however, success can drive its own challenges – and those challenges often require creative solutions.

### CHALLENGE

In Canada, Costco does not face a direct challenge from other membership-based chains, yet overall competition remains stiff thanks to numerous big-box retailers across the country. Costco's biggest competitor, however, is its own success, as nearly one third of the adult population in Canada is already a member.

That means both membership retention and new customer acquisition are key to the company's success.

*"While our focus is on new member acquisition, we have an even greater goal of ensuring our members are taking full advantage of all the benefits of a Costco membership,"* said Shannon Ambrose, Director of Marketing, Costco Canada. *"When a member makes the most of their membership – not only by buying products at the best value, but booking a trip through Costco Travel, shopping online at Costco.ca, using home and auto insurance services, for example – it strengthens their engagement and loyalty."*

When it comes to acquisition, however, the challenge is less about explaining the opportunities and more about locating the



new customers. With the penetration Costco has attained in Canada, they are always looking for new and creative ways to reach people they feel should be members but aren't.

### RELEVANCE

Warehouse stores are physical experiences by design. The sheer size of the stores and variety of products found within create both an exhilarating and overwhelming experience that drives sales. Perhaps more than at any other retailer, accidental discovery and in-store signage are welcome parts of the customer experience.

That doesn't mean these retailers don't use technology. When it comes to digital marketing, they use traditional digital ads, while mobile apps deliver digital coupons, allow members to create shopping lists and offer real-time notifications about price drops or personalized recommendations, all based on purchase and browsing history.

Many warehouse retailers, including Costco, also have an ecommerce presence, although many shoppers find the digital experience of warehouse shopping far less satisfying, especially as the product offerings and prices aren't always the same as in store. For these warehouse chains, driving people to brick-and-mortar buildings is the key to success – and nothing does that better than physical direct media.

*"Sending mail to our members is the right thing to do. When we drive people to the store, it's most likely going to be a sale,"* Ambrose said. *"With mail, I know I am reaching every member. That's not so for digital or email. We want to make sure our members have access to all the information they need from us. Mail does that every time."*

### INCITING ACTION

Costco didn't need a one-off solution – they wanted a strategy with multiple levers for the



long run focused on customer lifetime value: from finding new prospects to increasing member engagement.

“Direct mail has the unique ability to put our brand physically into the hands of our members and prospective members, further connecting them with our business,” Ambrose said. “Canada Post and its extensive data solutions allow us to reach and inform members of upcoming discounts right in the comfort of their home.”

From helping inform members about sales and promotions to developing sophisticated, customized plans that connect with Costco’s desired marketing segments, Costco tapped

into nearly every Canada Post Smartmail Marketing solution, including:

- › strategic and customized data targeting;
- › delivery of savings books and Costco Connection magazines to members;
- › announcements of warehouse openings and business centre quarterly promotions;
- › acquisition targeting in rural areas;
- › match-back analysis of new membership sign-ups, demonstrating direct mail’s influence on acquisition;
- › analysis of each mailing result, aligning to Costco’s specific metrics; and
- › foot traffic analysis and visualization tool mapping.

## RESULTS

Over the last year, Costco has mailed millions of pieces using Canada Post Personalized Mail, Canada Post Neighbourhood Mail and Postal Code Targeting on behalf of warehouses across the country. The results have been impressive:

- › 40% lift in responses from prospects and members receiving direct mail vs. a control group that did not receive direct mail.
- › 94% lift in new memberships from targeted areas receiving direct mail over those exposed to Costco’s other marketing channels alone.
- › Thousands of new memberships attributed to direct mail and \$84 million in sales attributed to direct mail in 2022.

## Case Study Debrief

**BRAND** Costco

**INDUSTRY** Retail

### INCITING ACTION

Costco uses direct mail for membership retention and acquisition with a focus on CLV.

### RESULTS

\$84 million in sales and thousands of new memberships attributed to direct mail.

### CONVERSION FUNNEL

Dots indicate where direct mail was used to incite action.



### DATA SOURCES

First-party

### PRODUCT

Personalized Mail™  
Postal Code Targeting  
Neighbourhood Mail™

### ACTIVATION PILLARS

- Physicality
- Data
- Connectivity

### KEY TAKEAWAYS

- › Direct mail effectively brings brand and performance marketing together to increase customer engagement.
- › Retention and acquisition developed with a focus on customer lifetime value works better when developed for the long run.
- › Find a media partner that can create custom solutions built on data.

“Canada Post not only understands our marketing challenges, but also our core culture. Together, we leverage different ideas and formats to go a step further in order to enhance our marketing approach while keeping our members’ interest at the heart of every communication we develop. Canada Post has been committed to our campaign success from the definition of a given project to the measurement of it so we can, together, always optimize our next campaign.” – Shannon Ambrose, Director of Marketing, Costco Canada



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Smartmail Marketing™

# CASE STORIES

*A collection of global work from across industries, showcasing how modern marketers are using direct mail media to connect with their audiences.*

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## SAVED BY THE DOORBELL

Glow-in-the-dark stickers put safety in the hands of citizens.

The idea was simple: Turn every doorbell in the city into a call for help.

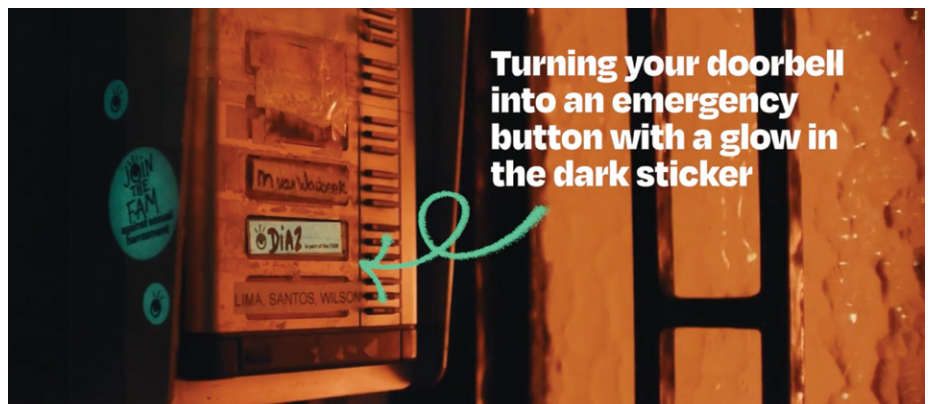
In Brussels, 9 out of 10 women have experienced some form of street harassment or violence. For years, the city has sought solutions through awareness campaigns, but, unfortunately, nothing changed – until it deployed a silent witness.

More than 180,000 households across the city were mailed glow-in-the-dark stickers that fit various doorbell types. When residents received the stickers by mail, they were directed to a video inviting them to affix them to their doorbell and explaining how to respond to rings for help.

In addition, influencers were recruited to explain the significance of the sticker campaign and promote the *Join the Fam* initiative. To further increase visibility, posters were hung in bars, restaurants and clubs explaining the mission.

Using a tangible, direct-to-consumer idea, the campaign amplified its paid and earned media to create a collaborative citizen safety network. The issue of street harassment and violence caught the attention of national press, becoming a hot topic of discussion.

Following the initial distribution of sticker sheets, the website still received requests for sheets from more than 3,200 other individuals. The campaign generated such a buzz that it has become a sustainable project for the city, rather than a one-time campaign.



Turning your doorbell into an emergency button with a glow in the dark sticker

## IN THE FABRIC OF COMMERCE

Shoppable media combines content and data to expand roots.

It's not always easy to expand your customer base when you're already an iconic Canadian brand from coast to coast to coast. But Roots knew it could grow deeper with a little help.

As back-to-school season approached, Roots knew there was a market eager to spend. The company defined its target segment for the growth campaign as independent and creative women and men between 28 and 35 years old, then sent them a mini-catalogue during this peak retail season when many people hit their reset button.

Using Postal Code Targeting from Canada Post, the catalogue went to five key neighbourhoods within a certain radius of a Roots store. With the help of Canada Post's data team, the company examined the demographics and past purchase data of Roots' customer base and sent the catalogue to this target group, offering them additional savings when they purchased two items or more.

Roots saw healthy sales growth almost immediately, both online and in store. But what was interesting was the order growth in the specific postal codes targeted with Canada Post. Online sales from customers within those targeted areas were considerably higher compared with non-targeted postal codes.

Moving forward, Roots plans to continue incorporating Postal Code Targeting into its campaigns, as shoppable content and strong data have proven to be a perfect fit.



## CHEMICAL REACTIONS

Campaign helps moms, politicians make 'scents' of toxic threat.

Considered a global threat by the UN and WHO, endocrine disruptors (EDs) are chemicals that can act like hormones and cause cancerous tumors, congenital disabilities and other developmental disorders.

These chemicals enter the body in numerous ways, including via smells, and can pollute human milk for years to come. Product manufacturers, however, are not required to warn of the presence of EDs on labels. That means moms cannot make informed decisions about their exposure during pregnancy and breastfeeding, thus potentially putting their child at risk through their milk.

Clovin, the biggest Polish producer of non-toxic household chemicals, wanted to promote a new safety standard for chemicals that are safe by design.

A European Commission report on EDs found that the doses that accumulate in human milk are so high, they are enough to make a perfume out of breast milk. So, a real perfume was made solely from the EDs a baby ingests in just six months of breastfeeding.

In May 2022, the perfume was mailed as a Mother's Day gift to moms in the European Parliament, along with mom influencers, journalists and celebrities. A follow-up video discussed the level of pollution in human milk, asking viewers to sign the petition to the EU Parliament.

The campaign resulted in six million video views on YouTube and Facebook, 600,000 interactions and 100,000 position reactions on Instagram, and more than 2,300 signatures on the petition presented to EU Parliament, where the issue of ED chemicals was discussed. With the rising awareness, advocates believe the law will soon be changed.



COMPANY: Clovin | PRODUCT: Cleaning products | COUNTRY: Poland | AGENCY: FCB&theMilkman



## ACCOUNTING FOR TASTE

New product launch puts a positive spin on pandemic rapid tests.

**M**atilda Bay's Aussie Wheat Ale was not just a new beer for the brand but a completely new style for the Australian market. At the time of launch, however, "taste" – or lack thereof – was a trending topic thanks to an outbreak of social media posts from people who had temporarily lost their sense of taste due to the latest wave of COVID.

The brand found influencers and journalists recovering from COVID and sent them a "Non-Rapid Taste Test," asking them to publicly take the test to determine if their taste receptors had fully recovered.

The test appeared like any other, only inside the box was a can of Wheat Ale with step-by-step instructions. Through the familiar language of internationally produced COVID tests, the brand outlined the four delicate flavours a healthy palate would detect.

If the influencer or journalist could detect all four, their taste had officially returned.

The brand hoped to take the product truth – that the beer had an exceptional taste profile – and bring it together with a trending topic of the day, thereby hacking the "taste" conversation.

With a budget of \$20K for media and production, the campaign resulted in 2.2 million earned media impressions, a 180% increase in bottle store distribution and a 95% increase in sales vs. the previous product launch.

Guess there is some accounting for taste.



# TAKE IT TO THE MAX

HBO puts family first in launch of new streaming platform.

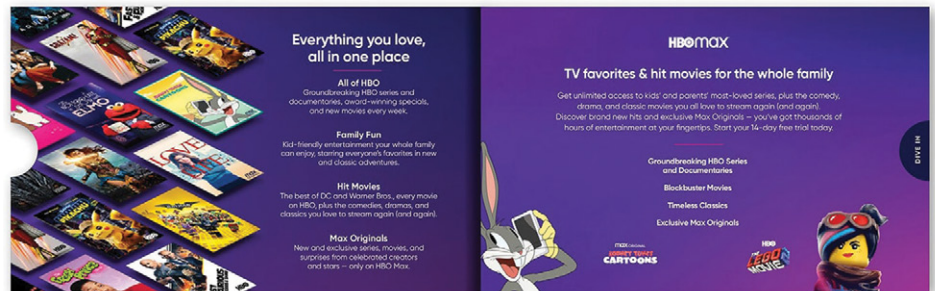
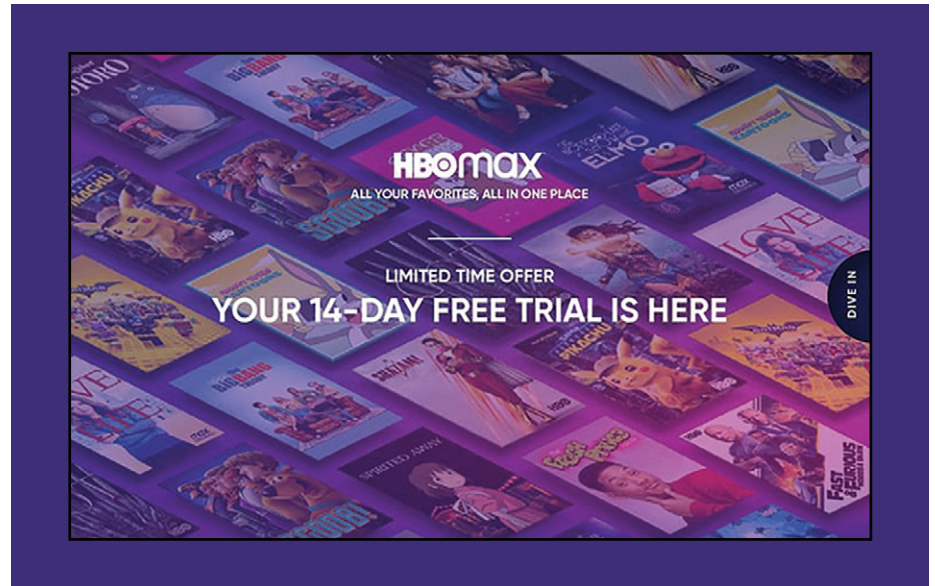
It's not TV. It's HBO. Actually, it's not even HBO. It's HBO Max (renamed Max in 2023) – and that was a fact Warner Bros. Discovery (formerly WarnerMedia) needed to drive home to consumers when launching its highly publicized streaming service in the United States.

As the first television service transmitted directly to individual cable television systems, HBO laid the blueprint for the premium television network model. More recently, the network has adapted to changing media consumption habits by expanding its web-based streaming experiences.

In May 2020, HBO launched the HBO Max streaming platform, a direct-to-consumer product that provides film and television content. In a hyper-competitive streaming market, subscriber numbers are king – and HBO Max needed a lot of them quickly to be seen as viable.

A digital and direct mail subscriber campaign targeted family households based on their potentially higher customer lifetime value. Offering a 14-day free trial, the mailing focused on the hundreds of family-friendly titles popular with early HBO Max subscribers. The creative was refreshed monthly to speak to the moment and fear of missing out.

One year later, HBO and HBO Max had a combined total of 69.4 million paying subscribers globally, including 43.5 million HBO Max subscribers in the U.S.



COMPANY: HBO Max | PRODUCT: Streaming service | COUNTRY: U.S. | AGENCY: Kern

## DOG-EARED PAGES

Kids learn to read alongside an eager audience – their dog.

For young kids, one of the biggest challenges when learning to read is the embarrassment of making mistakes. To help boost confidence and fast-track kids' progress, Pedigree partnered with teachers and language experts to create *Dogphonics* – a program designed to let kids read to someone who's extremely patient, full of love and never judgemental...

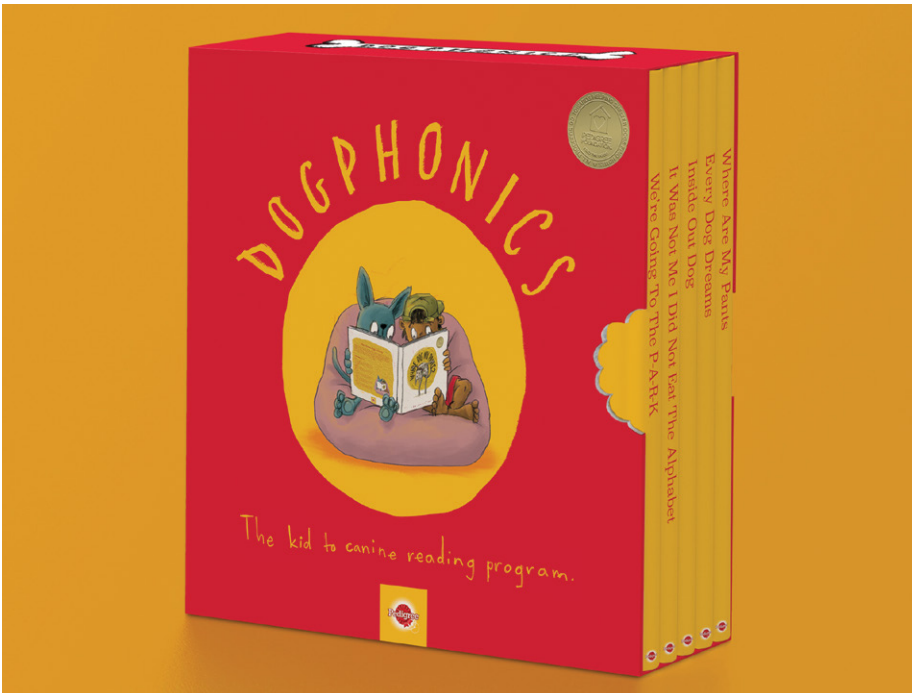
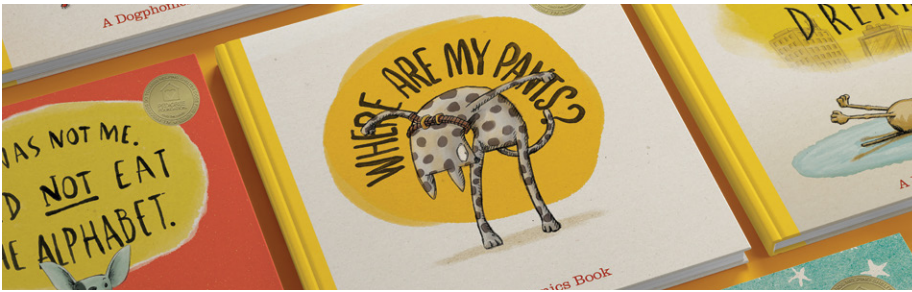
Their dog.

The program sought to remove any academic system where kids would feel pressure to achieve and instead let them experience the joy of reading.

Launched in April 2022 in New Zealand, *Dogphonics* consisted of five physical and electronic books with titles such as *Every dog dreams*, *Where are my pants?* and *We're going to the p-a-r-k*. In-school sessions and influencers were mailed copies of the books to help promote the program while print and social media ads directed people to bookstores.

In its first two weeks, *Dogphonics* gained a reach of more than one million and 93% of books sold. Additionally, surveys showed that over 90% of kids completed the program (read all the books), and 88% of kids who participated had an increase in reading confidence.

Following its success in New Zealand, *Dogphonics* rolled out across North America and is now available worldwide on Amazon Kindle. Proceeds from book sales go toward rehoming more of our four-legged teachers.



## MORE THAN SKIN DEEP

Riversol discovers a powerful way to win customers.

Not every free sample request turns into a sale – but every free sample request is an opportunity.

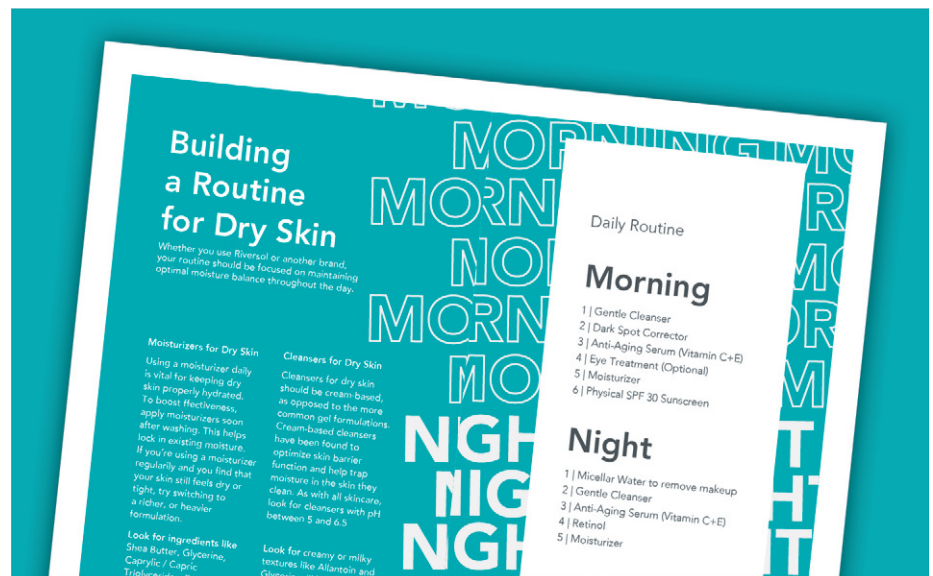
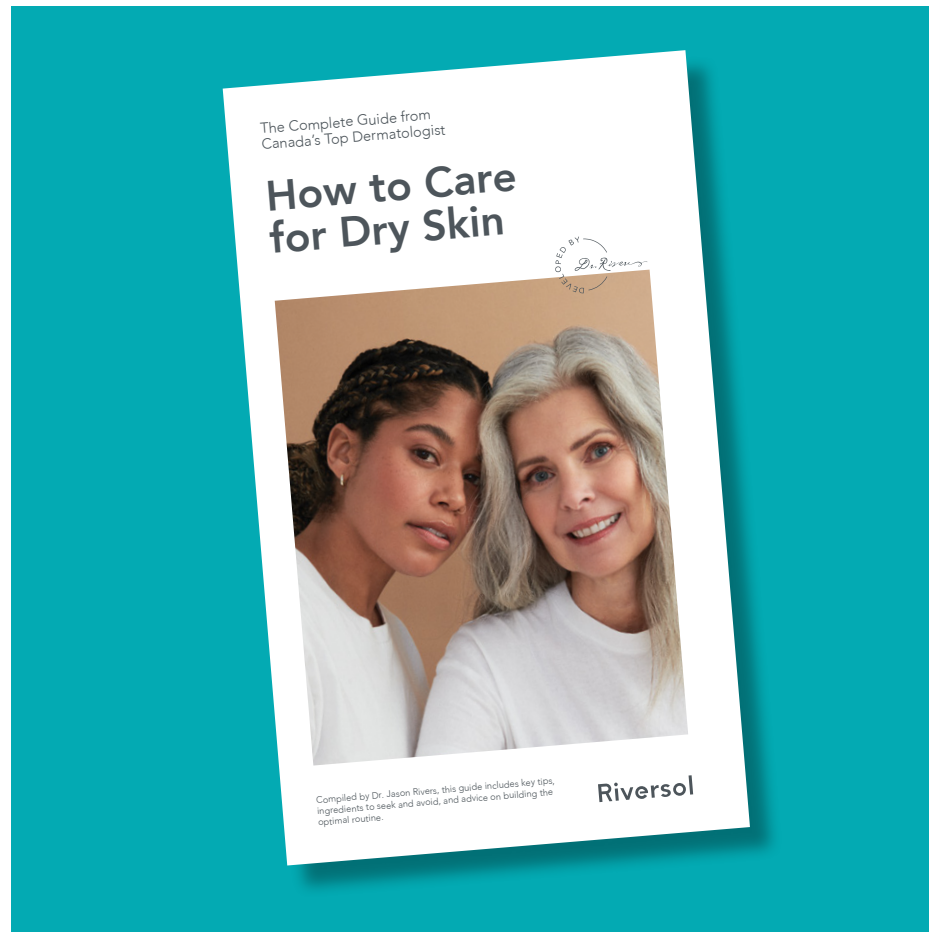
Riversol, a Vancouver-based skincare brand, credits its success to customers trying its products before making a purchase. To date, the ecommerce brand has mailed more than one million 15-day sample kits to existing and potential customers.

Riversol then uses information gathered from those requests to build its customer connections with communications promoting new products, seasonal skincare tips and upcoming sales.

Previously, the company leaned solely on digital channels – largely email – to reactivate customers. But technical challenges with getting accurate open rates made connecting via the inbox unpredictable. Add in noisy social media channels and uncertain search results, and it's no wonder the company wanted to explore direct mail as a way of getting its message heard.

Customers receiving the direct mail ordered 21% more items than those who were only exposed to digital channels. The results opened a promising channel to explore going forward, allowing the company to bring brand story and product together in ways that helped people experience the product first-hand.

Riversol was so impressed with the results of the campaign that it has decided to continue with direct mail as win-back channel moving forward. It also plans to test further, looking at how more impactful creative, different offers and new targeting ideas can help better captivate customers.





United Nations | Not for Profit

## EARTH ON THE BALANCE SHEET

Global Compact campaign puts planet on the open market.

The UN's Global Compact, the world's largest corporate sustainability initiative, calls for companies to align operations with its long-term targets. It's an ambitious goal that needs to capture the attention of world business leaders.

The UN, along with Brazil's B3 stock exchange, set out to make sure those leaders understood the initiative by speaking to them in a language they would understand – value.

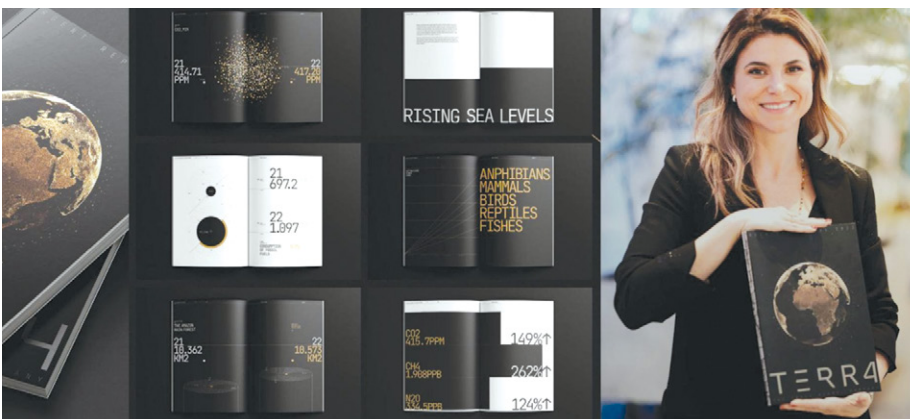
Enter the most urgent IPO ever. When B3, the first stock exchange to sign the Global Compact, listed Earth (ticker: EART4) on the exchange, the world took notice thanks to a campaign that used direct media to reach its target audience and amplify its message in earned media.

Business leaders were pointed to a real-time simulator website showing Earth's fluctuating stock price based on what was happening in the world. Each leader was also mailed *The Urgent Report*, an annual-report-style book on Earth's "performance" as a company.

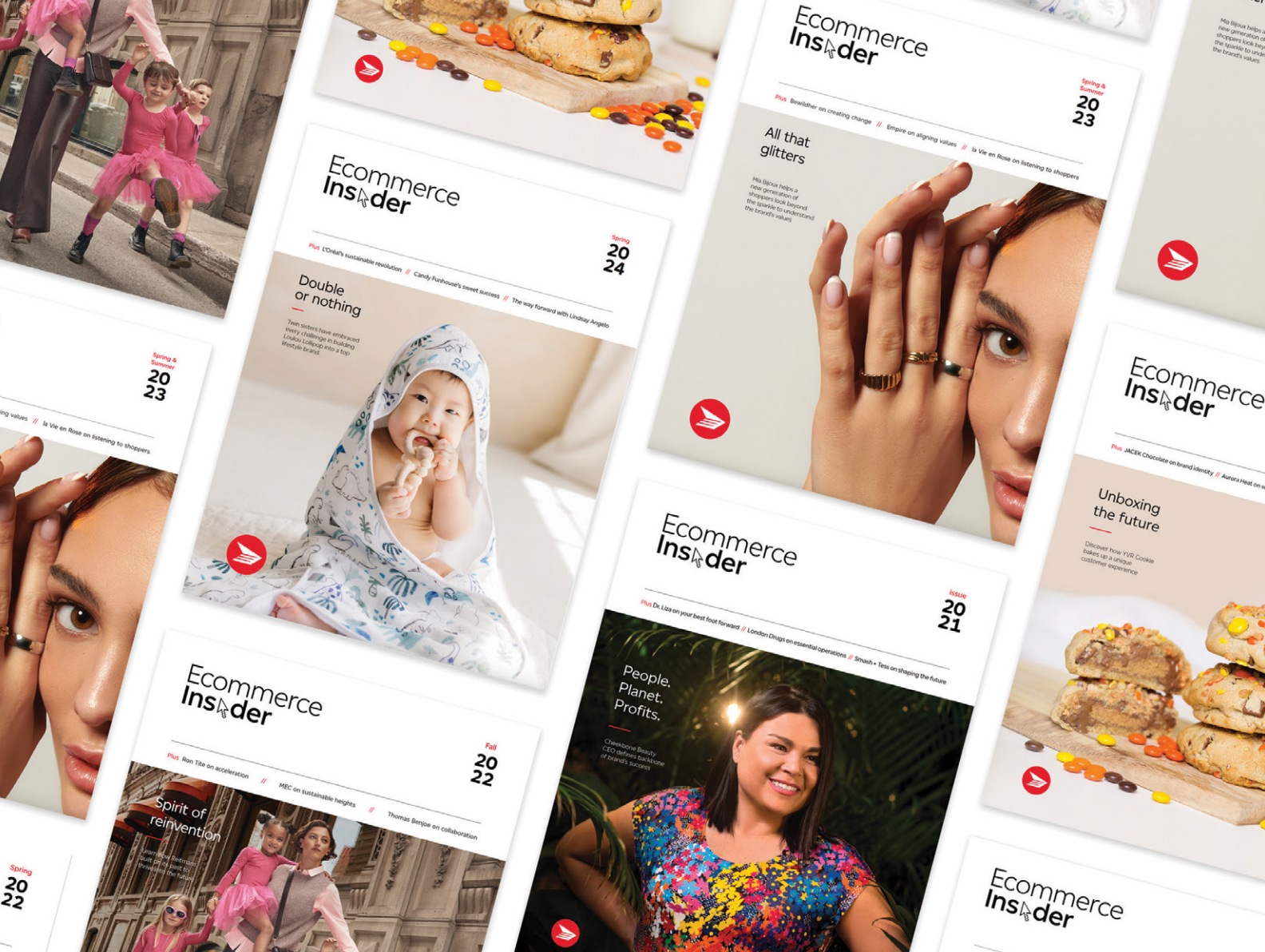
The report has already reached 20,000 business leaders across the globe and earned \$58 million in media. It boasts the best response rate for a UN direct mailing initiative ever and was featured in national and international media.

After its launch in Brazil, many other UN Global Compact networks started to request translated copies. To this date, Norway, the United States, Mexico, Italy, Colombia, Finland and Sri Lanka have made plans to do the same.

The campaign has resulted in a 140% year-on-year increase in sign-ups to UN Global Compact's voluntary agreement, including 70% of Brazil's top 100 companies.



COMPANY: United Nations | COUNTRY: Brazil | AGENCY: AlmapBBDO Sao Paulo



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DID YOU GET MY EMOJI REACTION TO YOUR DM RESPONDING TO MY COMMENT ON THE CONVERSATION THREAD ON WHY WE NEVER SEEM TO HAVE TIME TO GET ANY WORK DONE?



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# MORE OR LESS

*By Lina Kim*

*The new media landscape means exciting opportunities for brands to strike a balance by testing, learning and optimizing their way into the future.*



I am a child of the eighties – born in 1980, to be exact. One of the benefits of being this age is I've experienced two very different lives in these 40-plus years.

The first 20 pre-adult years were in a world relatively unfettered by the advances of technology; these were the days before the Internet of Things (IoT) took over. It was a time where purchasing an item meant physically going to a brick-and-mortar store. It was a time where being social meant leaving your house to go watch a movie with friends. It was a time where if you missed a call and didn't have an answering machine, you were screwed. And who needs phones anyway? Having a pager was even cool for a moment.

Our interactions with media and technology were limited and our exposure to advertising pretty mundane. In fact, in those pre-adult years, I distinctly recall my thirst for more – more TV time, more phone time, more Nintendo time.

Our pre-IoT lives were a far cry from the way we live our lives today.

In the last two decades, technology has unleashed an abundance of opportunity for us to connect, converse, and consume and create content, online and on demand. Digitization and the IoT have taken over the nooks and crannies of our daily lives.

Witnessing the digital transformation of the media landscape has been incredible and somewhat dizzying to experience first-hand. It's growing so rapidly that we're creating more universes and building media real estate seemingly out of thin air with the advent of the metaverse.

According to Deloitte, the average U.S. household had 21 connected devices in 2023. I own close to this number myself. Technology has certainly abated my thirst for more in my post-IoT life. In fact, despite a plethora of opportunities for more, I now find myself wanting less.

People have the potential to be exposed to thousands of ads a day. Even as an

experienced marketing professional, it's hard to believe, but it makes absolute sense – more media means more opportunities to see ads. The digital world, our devices and the data they hold cover us in a blanket of constant connection and are always priming us for advertising.

It has certainly been an exciting time to be in the media industry, especially in the last several years.

Digitization has created an explosion of advertiser opportunities using a combination of new forms of media and the enhancement and expansion of traditional channels. Audio has experienced a major boom with the introduction of podcasts. Social media options continue to grow, with the launch of Threads just last year. Offline media channels such as direct mail have become addressable. Retail media channels now go way beyond shelf toppers in grocery stores.

The growth of the media landscape even goes beyond the creation of new platforms. The proliferation of data and analytics allows for more advanced targeting and faster, better creative optimization. The recent introduction of generative AI and its impact on advertising reflects how our media landscape is growing not just in size but also in capabilities.

The dilemma faced by the modern-day consumer is no different from the one faced by the modern-day advertiser. As consumers, we have an abundant supply of media at our disposal, but our time and attention are limited. Advertisers also have the same media supply available to purchase, but their marketing dollars are limited, and the dilemma faced by advertisers is far more complicated to solve.

Understanding the impact of new forms of media on consumer behaviour alongside the rapid pace at which new technology and innovation are entering the market has been incredibly challenging.

The rewards of exploring new and emerging media can be incredibly fruitful. Brands may

discover net-new audiences or find new and more engaging ways to interact with their target audience. But the risks are also higher, as that trendy new media platform everyone is talking about may deliver little to no ROI while taking away marketing dollars from proven channels.

So, how can brands better navigate this dynamic landscape and effectively leverage new and emerging media opportunities? While there is no easy answer, there are three key areas advertisers must consider and implement in approaching the new media landscape.

## 1. ADOPTING AN AGILE MINDSET

I fondly remember the early days of my media career, when clients would balk at any recommendation to include test-and-learn budgets for digital channels. While brands are much more open now to testing new media opportunities, it's imperative to apply this ethos on a consistent basis.

Building and implementing an evergreen test-and-learn strategy is critical. Marketing is not a hard science; testing opens the door to data access that can help power smarter marketing decisions. Brands need to be agile and adapt plans to drive optimal results; when to make those changes is best guided by data. The insights that can be gleaned are invaluable, and advertisers must strive to learn as much as they can about the impact of the new media landscape to optimize their approach in the future and do so with speed.

## 2. ASSESSING MEDIA SUITABILITY

With the plethora of options to consider, brands also need to create a framework to assess the media suitability of new and untested opportunities. The fundamental goal of media planning serves to answer a simple question: Can it reach the right person, at the right moment, in the right place, with the right message?

What is "right" is relative to each brand. Filtering opportunities against clearly outlined minimum activation requirements will better determine if a new channel or tactic is worth the time and investment. Those filters include the following:

## “Both modern-day consumers and advertisers face similar dilemmas with abundant media supply but limited resources: Consumers have finite time and attention, while advertisers have restricted marketing budgets, making the advertisers’ challenge more complex.”

### Consumer

- › Can they accurately reach your target audience?
- › What is their targeting strategy, and what types of data do they use to inform targeting?
- › What is the total reach against your target audience? Is this reach sufficient?
- › What is the projected future audience growth?

### Content/context

- › Does the content align with the target’s interests and affinities? What is the breadth of targeting available?
- › How do users interact with the media? What are current user engagement levels? How much time is spent, and how are they spending it?
- › Is the environment brand safe? What brand safety protocols are in place to protect users and advertisers?

### Creative

- › What creative formats are offered? Do they go beyond standard units?
- › What are the current platform benchmarks by creative?
- › What are the creative best practices for the platform?

### Competitive presence

- › Are direct competitors present and active?
- › Can they provide competitor share of media or any data on levels of activity and investment?

### Cost implications

- › How does the cost compare to similar media?
- › Is the opportunity affordable compared to available marketing budgets?

### 3. MANDATORY MEASUREMENT STRATEGY

Now comes the fun part – data.

If data is the fuel that drives the marketing machine, the measurement strategy is the engine. How performance data is collected, defined and analyzed is as important as being able to generate the data itself. A strong measurement strategy, including clear objectives and KPIs, maximizes the utility of the data collected; it creates the blueprint we need to assess performance and provide actionable insights.

New and emerging media may not be able to provide the same breadth of campaign data as established channels. While more data is always better, less data is not always prohibitive. Assessing if there is sufficient data to effectively measure performance is key to determine early in the process.

If data is sufficient, level-setting KPIs against available platform performance benchmarks and realistic performance expectations is also recommended. However, if the data isn’t sufficient, or if we can’t measure the rewards of our efforts, then is it worth the risk and investment?

### EMBRACING NEW MEDIA

The thirst for more that characterized my pre-adult years has evolved into a desire for balance and meaning in new media

and in how we productively engage with it as marketers.

In this new world of media, the options seem overwhelming and endless. How do we know for certain if the juice is worth the squeeze? If the risk is worth the reward?

The fact is, nothing is certain until it’s tested. Brands can no longer afford to approach these new opportunities with fear. Marketing is a combination of science and art, or, more poetically, it is the intersection of data and imagination.

When it comes to new media opportunities: Be curious. Be open. Be brave. And remember to test, learn and optimize – always. ■

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**Lina Kim** is an executive media consultant and strategist. Over the last 17 years, she has deepened her understanding of the media industry in a diverse array of roles including President of The Podcast Exchange (TPX), Managing Director at Havas Media Group, and MiQ.



# SKY'S THE LIMIT WITH DIRECT MAIL

*U.K. media giant connects with customers by tuning in to the possibilities of direct mail.*

**W**hen your company has sky-high aspirations, your marketing needs to rise to the occasion.

U.K.-based Sky, one of Europe's leading media companies, serves 23 million customers in six countries, providing them with news, sports, entertainment and original programming. Operating in such a competitive marketplace, the media giant needs to be in constant contact with its current (and potential) customers.

Patrick Collister, former executive creative director of Ogilvy & Mather London and founder of the Caples Awards, a global advertising festival, recently sat down with members of the Sky marketing team to discuss the role of direct mail in the company's marketing efforts.

## WHY IS DIRECT MAIL SUCH A POWERFUL SOLUTION FOR SKY?

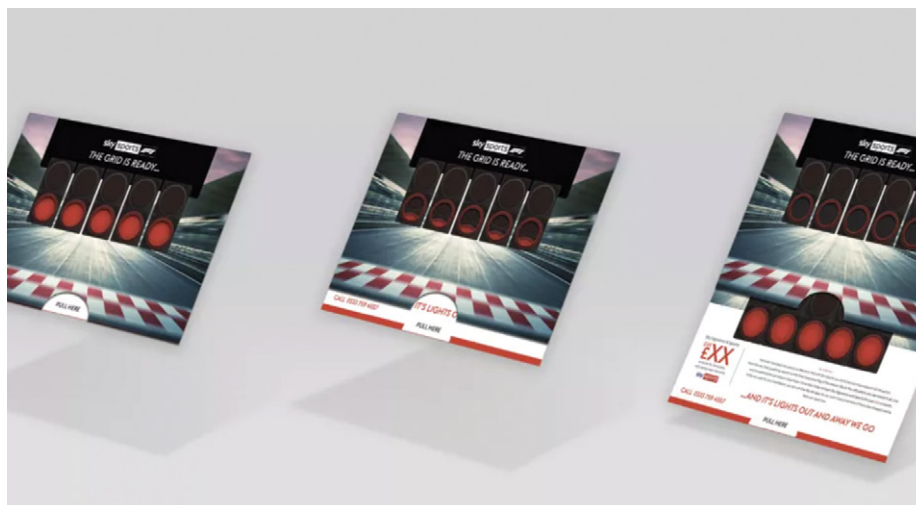
**SKY** Direct mail works. It's as simple as that. Getting customers to stay with you or luring them back in a cost-of-living crisis like this one is harder than ever. But time and time again we've had success. There are two key reasons for this: We have an "always-on" approach, and we believe in creativity.

Our in-house agency is constantly trying to generate fresh, surprising and interactive media pieces.

Our targeting may be spot on, but that's a double-edged sword, because if you are mailing people messages that aren't relevant to them, then you run the risk of getting the right people to think all the wrong things about you. That's why our team takes care to make the creative not only relevant but fun.

## LET'S TALK ABOUT FUN. ARE THERE ANY RECENT PIECES THAT STAND OUT FOR YOU?

**SKY** Let's take our Formula 1 racing campaign, for example. In the U.K., Sky is the only place where you can watch F1 live,



including practices and pre- and post-race coverage. The start of the 2023 season was a great opportunity to win back racing fans and sports lovers who hadn't renewed their subscriptions.

The idea used a die-cut window and pull-tab mechanic, with copy urging recipients to "turn off" the grid lights that signal the start of a race. This revealed punchy copy and a tailored price offer.

With this mailing, the urge to pull is almost irresistible. While we can't give away the data, let's just say the numbers of those who did pull was significantly above target.

## WHY DO YOU THINK THIS WORKED SO WELL?

**SKY** People hold mail in their hands and engage with it physically. We've learned from experience that interactivity is vital for success. We've also learned there's both an art and a science to it. Make the mechanic too simple and there's no reward for the recipient. Make it too complex or time-consuming and people can't be bothered with it.

With our *Game of Thrones* mailer as another example, all you had to do was lift the flap to see the dragon revealed. Previous packs have



included many different paper mechanics. For instance, tear-and-reveal strips, parts of the pack that can be rotated by the recipient, word search puzzles and more.

The ongoing brief is to come up with innovative ideas that also represent the best value for money: Return on investment is obviously critical.

## WHAT ARE SOME OF YOUR SECRETS TO MAKING DIRECT MAIL SUCH AN EFFECTIVE CHANNEL?

**SKY** Firstly, Sky is an entertainment brand, and that needs to be reflected in the creative. Secondly, when we were coming out of COVID-19 lockdowns, we learned exactly how important it is for our communications to be both timely and relevant to the recipient.

What we do now is identify key dates in a calendar year (national, traditional and special events such as Valentine's Day or the coronation) along with dates specific to Sky content or shows. Then we brief the creative department to come up with ideas, using that list as inspiration.

How those ideas work as a suite is important. For instance, we've just launched Sky Protect, a new home insurance and smart tech product. That was a huge campaign: TV, outdoor, print, digital, experiential, retail and email. Direct mail was brought in to extend and amplify the big idea.

Critically planned, proactive and ongoing campaigns are way more effective than just mailing out a series of reactive one-offs. Our win-back campaigns, for instance, are comprised of separate mailings all revolving around one cohesive theme.

## DO YOU USE DIRECT MAIL DIFFERENTLY FOR ACQUISITION THAN FOR RETENTION OBJECTIVES?

**SKY** Acquisition of new customers is crucial from a commercial perspective as it generates income and provides opportunities to offer them additional products and services in the future.



One tactic we use is to talk to people when they move into a new home. We send them a pack containing snacks, cleaning products, dishwasher tablets – those kind of “welcome home” things that feel personal and relevant.

Like any company, we have customers who leave. To win them back, we target each person with a tailored price offer and show them what they're missing. Bold, brave creative gets the best results.

We think it pays to take an “always-on” approach to our work, and we've had great success with direct mail when it is contextually relevant to what's happening in the world at the time.

When our *Coronation of King Charles III* campaign was sent to 350,000 customers, the results were more than twice as good as our usual, standard mailings. By combining authenticity, personalization and timeliness, we were able to achieve a 105% better performance compared to our standard business-as-usual direct mail campaigns.

What was brave here was that we didn't use the mailing to communicate information about Sky products and services in detail. It simply encouraged recipients to “RSVP” by calling a phone number to find out more. We thought this CTA would increase the likelihood that people would convert, and that proved to be the case.

## HOW DOES SKY ACCOUNT FOR SUSTAINABILITY IN ITS CAMPAIGNS?

**SKY** An important part of all our campaigns is to ensure they comply with the company's commitment to be net carbon zero by 2030. All direct mail ideas are reviewed with this in mind, ensuring paper stock, ink and any print finishing comply, while also meeting Sky's high production quality standards.

The paper manufacturers and print suppliers we select are chosen according to their environmental credentials, too.

## RISING TO THE OCCASION

Sky's strategic and creative use of direct mail has proven to be a flexible tool in engaging customers, driving retention and winning back lapsed customers. Its approach emphasizes the importance of entertainment and creativity, interactivity, timeliness and contextual relevance, along with a commitment to sustainability, showcasing how direct mail marketing can be effectively leveraged across different marketing objectives. ■



# THERE ARE HOLES IN THE BUCKET

*Patching the leaks amidst advertising deficiencies  
requires strategies focused on effectiveness.*

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## Key Takeaways

Holistic marketing strategies  
have never been more  
integral to success.

Focus on closing ad  
effectiveness gaps, not  
buying ad efficiencies.

Direct mail can play a  
valuable role in addressing  
advertising deficiencies.

**M**arketers are facing an array of challenges in 2024, from soft market economics and consumer spending constraints to shifts in the media advertising landscape and escalating budgetary pressures – it's creating a leaky bucket to end all leaky buckets.

According to Media in Canada, modest growth is anticipated for the Canadian economy, with the S&P Global forecast predicting a sluggish 0.8% growth in 2024 and 1.4% in 2025. This economic outlook foresees subpar in-store demand, a slower job market and an increase in unemployment to an average of 6.1%, up from 5.4% last year. BMO anticipates that the Canadian economy will continue to trail the U.S. for the next year, and the Canadian Conference Board highlights persistent concerns about the cost of living, high interest rates and inflation throughout 2024.

The Gartner 2023 CMO Spend and Strategy Survey (U.S.) reveals that 71% of CMOs lacked the budget to fully execute their strategy in 2023 and 75% felt increased pressure to “do more with less” for profitable growth. In response, 86% of marketers expressed the need for significant changes in how the marketing function operates to achieve sustainable results. Ewan McIntyre, Chief of Research and VP Analyst in the Gartner Marketing practice, notes, “*Suppressed budgets, increasing costs, and lower productivity are squeezing CMOs’ spending power.*”

Dentsu projects the Canadian ad market will reach \$9.3 billion this year and grow to \$9.8 billion in 2025, representing moderate

growth driven by cultural events like the Paris Olympics and ad inflation. As Canada lags behind American growth, Canadian marketers also face pressure to achieve more with less and demonstrate short-term results for marketing expenditure.

Beyond the hype and headlines of generative AI creative, retail media networks to the reach-rescue and digital channel absolutism, 2024 presents a complex amalgamation of factors that are contributing to advertising deficiencies and challenging overall ad effectiveness.

#### WHAT SETS 2024 APART?

**Complexity:** The media landscape has become vastly more intricate, both on the front end and the back end. It's getting harder to bring it all together. It's not just that there are more channels, it's about the changing economics of advertising and the increasing interplay between advertising, customer experience and commerce. Balancing numerous channels and adapting to these changes challenges traditional and siloed advertising approaches. Understanding how media works together is crucial for creating incremental advertising effects.

**Media inflation:** Shrinkflation isn't only for consumer packaged goods. Unlike CPGs, it can be hard to discern the impact of inflation on media productivity. In Canada, media inflation ranges from 0.4% to 10% across channels. Ebiquty research shows the highest inflation in the channels that are also getting the most investment while showing shrinking value (other than CTV).

This includes TV (9.7%), online video (6.7%), CTV (9.3%) and social media video (6.8%). Additionally, Dentsu reports that Canada ranks sixth in per-capita ad spend at \$275 in 2024 (against a global average of \$139), reflecting the growing ad load pressure faced by audiences.

**Short-termism:** A recessionary context and the imperative to link media impressions to conversion are concentrating dollars in performance marketing and retail media networks – keeping the focus on efficiencies. Research by Peter Field for the ICA in 2022 found that Canadian marketers already lean toward short-termism compared to other mature markets. This fact, combined with generative AI and increasing issues related to managing reach and frequency, points to a noisy and transactional ad economy in 2024.

**Technology changes:** Technological advancements in ad delivery and third-party cookie deprecation are steering the industry toward large platforms using first-party data. This dynamic shift is not only changing where dollars are allocated but also reshaping the relationships within the industry among agencies, media companies, publishers and audiences. The merging of advertising and commerce, along with new omni-channel requirements, is redefining how brands interact with audiences.

**Consumer gaps:** Fragmentation on the open web, coupled with cookie deprecation and the allure of CTV and retail media networks, directs funds to walled gardens, creating a disparity between where people spend their

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## WHAT'S IN AND OUT FOR 2024

2024 is bringing the heat. Lean in to the topics reshaping the landscape, surfacing the dos and don'ts to steer your decision making toward maximizing budget and channel value.

### In

- Consumer-channel match
- Holistic channel strategies
- Media value
- Incrementality
- Attention
- Content quality
- Commerce media

### Out

- Channel efficiency first
- Siloed channel strategies
- Media inflation
- Attribution
- Impressions
- Content volume
- Digital performance marketing



time and where ad dollars are allocated. The Trade Desk found that 60% of consumer time is spent on the open web while more than 52% of dollars are allocated to walled gardens (and Epsilon and LiveRamp both reported similar disparities). As AI proliferates, media safety challenges will persist on the open web, leading to increased ad avoidance.

### DIRECT MAIL, IT HITS DIFFERENT

While not the sole solution, direct mail stands out for its media value in addressing ad deficiencies. Paul Stringer, Managing Editor, Research & Advisory at WARC, states, *“What we found was that direct mail can act as a real differentiator, delivering against brand, performance and commercial goals while offering high levels of memorability and engagement.”*

**Come together:** Developments in marketing automation, first-party data and omni-channel connectivity enable cross-channel marketing integration like never before. Lob’s 2024 *State of Direct Mail Marketing* report indicates that 56% of marketers (+14% over 2023) automate direct mail using marketing automation platforms and CRM platforms. While direct mail is an excellent stand-alone tactic, marketers need the multiple effects that come from integration. According to Winterberry Group, more than one third of marketers say an improved ability to activate omni-channel campaigns is the top factor in their decision to increase direct mail spend over the next year.

**Neutralize shrinkflation:** Unlike other media, when it comes to media cost, direct mail inflation is one of the very lowest in the industry and extremely stable year over year. It also doesn’t vary by audience like it does with TV. The 2024 *State of Direct Mail Marketing* report found that 84% of marketers say the

## “What we found was that direct mail can act as a real differentiator, delivering against brand, performance and commercial goals while offering high levels of memorability and engagement.”

channel gives them the best ROI, up 10 points since the 2023 survey, with the greatest growth among ecommerce marketers.

**Attention getter:** Attention is the first principle of advertising – you have nothing without it. As opportunity-to-see metrics become less useful, attention metrics are getting all the attention. With today’s attention scarcity and digital ad loads having nearly doubled since 2014, Marketreach and JICMAIL found that 63% of people aren’t doing anything else while they’re looking at direct mail. Subsequently, the cost per minute of attention is 40% more efficient for direct mail than it is for social ads. With proven ad recall lift through neuromarketing studies and greater attention, marketers can build brand and improve conversion at the same time.

**More reach, please:** Marketers seek efficient reach at scale. Reach and frequency are proving difficult to manage in a developing cross-channel media landscape across linear and non-linear TV, walled gardens and digital channels. Direct mail can efficiently create incremental reach through influencer marketing, look-alike data targeting and automated retargeting, which complement TV, digital and even podcast efforts where audiences are shrinking, hard to reach or niche.

**Connect the dots:** Direct mail, while not a retail media network, is a form of commerce media – bringing advertising, media impressions

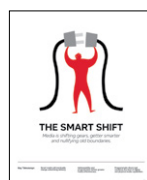
and conversion together through interactive content, samples, offers, catalogues and more. Direct mail’s ability to match high-value audiences through data and its proximity to buyer decision-making moments (with 9 in 10 buying decisions influenced or made at home) enhance overall time to conversion. It complements retail media networks and layers with other commerce media by filling gaps in brand and customer experience along the customer journey that are often exacerbated by digital-first and DTC strategies that aren’t diversified and don’t reflect the expectations of connected consumers.

### PATCHING THE LEAKY BUCKET

In today’s complex ad world, it’s vital to tackle challenges contributing to ad deficiencies. A comprehensive marketing approach across all channels is key to maximizing ad spend effectiveness and ensuring maximum media productivity. ■

### Read More >>

Go to [canadapost.ca/incite](https://canadapost.ca/incite) to download these articles from our issue archive for more on how direct mail can address ad deficiencies.



INCITE 2024 01  
The Smart Shift



INCITE 2023 02  
Directions and Directness



INCITE 2022 03  
Reconfiguring Identity



INCITE 2022 02  
Direct, Naturally



INCITE 2021 03  
Direct Mail Brings Media Home



# DIRECT MAIL x MEDIA VALUE DATAGRAM



## MORE VALUE PER TOUCH

Riversol targeted people who'd ordered a 15-day free trial, using direct mail to reactivate them. It allowed the brand to tell its story, extend content and provide an experience as intimate as its products. Customers receiving the direct mail ordered **21% more items** than those only exposed to digital channels.

Source: Riversol



## OMNI-CHANNEL BENEFITS

**39%** of marketers say an improved ability to activate omni-channel campaigns is the top factor in their decision to **increase direct mail spend** over the next year.

Source: *Delivering Performance: Direct Mail in the United States 2023*, Winterberry Group, September 2023



## ENGAGEMENT TO THE MAX

Direct mail has a **95% engagement rate**, whereas **57%** of consumers are unsubscribing from emails, primarily due to receiving an excessive number of digital messages.

Source: Marketreach, 2023



## ROI WINNER

**84%** of marketers agree **direct mail provides the highest ROI** of any channel they use. This number has consistently increased year over year over the last three years (**74%** in 2023; **67%** in 2022).

Source: *2024 State of Direct Mail Marketing*, Lob and Comperemedia



## ATTENTION EFFICIENT

Mail is more attention efficient than social and digital display. It costs only **£0.11 (CAN\$0.19)** to generate a minute of consumer attention with direct mail, compared with **£0.15 (CAN\$0.26)** for desktop display and **£0.19 (CAN\$0.32)** for social display.

Source: *The Time We Spend With Mail*, JICMAIL, 2023



## CUSTOMER LIFETIME LIFT

When a supplements brand looked to secure customer lifetime value, it turned to a direct mail win-back campaign targeting repeat purchasers who had exceeded **90 days** since their last purchase. The results? A **1,052.8% ROI**.

Source: "How these 5 retailers use direct mail to increase sales," Shopify, May 2022



## BROWSERS INTO BUYERS

Catalogues turn consumers into buyers:

**76%** said catalogues give them ideas of things to buy.  
**69%** spend 5-30 minutes reading catalogues.

**68%** notice a catalogue in the mail vs. a marketing email.

**55%** bought something they saw in a catalogue.

Source: *Catalogues: Connecting With consumers. Converting Sales.*, Royal Mail Marketreach



# IN THE NEXT ISSUE

## THE TECH ISSUE

- › Get advice on how to put tech into perspective.
- › See how post-third-party cookie data solutions are taking shape.
- › Understand new metrics like attention.
- › Explore perspectives on AI and advertising.

**“INCITE is my go-to resource to discover what’s on the minds of marketers. I often quote from its pages knowing full well the information is well researched and on the leading edge.”**

– Christine McArthur,  
Chief Marketing Officer, Legal Monkeys

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# The Essential Guide to Direct Mail



## This year's marketing must-have.

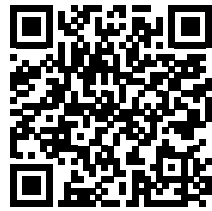
Looking to speak directly to your customers? The new Essential Guide to Direct Mail provides more insights, tips and tricks needed to let direct mail power your next marketing campaign.



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