



# PRINT MEDIA PREDICTIONS 2023

**INSIDER PERSPECTIVES ON THE  
PUBLISHING, PRINTING, PAPER  
AND ADVERTISING INDUSTRIES**





**ULBE JELLUMA**  
MD PRINT POWER

Print Power wants to bring the knowledge of advertising effectiveness in the publishing, printing and paper industries closer to the advertisers, media and creative agencies in order to stimulate the use of advertising in printed media.

**P**rint Power launched 14 years ago to present a voice against the then upcoming digital media. Focusing on brands, media and creative agencies, Print Power's narrative back then was on the effectiveness of advertising in print media such as newspapers, magazines, direct and door drops.

However, the publishing, printing, paper and advertising industries have changed dramatically over the last decade. Digital media advertising now accounts in some countries for 75 per cent of the total ad spend. Surprisingly, digital media also impacts the role of traditional media. Just check out the effect that BookTok has on the reading behaviour of young people.

The interest in the sustainability of paper has become mainstream, and the need for action in controlling global temperatures has intensified. This broadened perspective impacts the resources, processes and output of the entire value chain of (print) advertising.

The printing industry has also gone through some major changes, both in terms of technology and on the supplier side. Digital printing continues to eat from traditional print technologies, and offers increasingly innovative possibilities for printing on other 'substrates' like textiles, PVC, tiles and more. Online printshops have developed order grouping systems, allowing clients fast production and affordable prices.

Printed electronics, layered paper with integrated sensors, higher and faster quality printing technologies, the use of QR codes, Augmented Reality and Artificial Intelligence are just some of the innovations in the printing market, offering opportunities for the early adopters in the industry.

All of the above changes have and continue to impact the media mix of advertisers in 2023. Although all the players in the publishing, printing and paper industry organise conferences, expos and exhibitions, their business remains relatively unknown to the advertisers and their agencies. Research showed a couple of years ago that even on such a key subject as effectiveness of media, advertisers and their agencies were not able to correctly rank the channels.

Print Power's aim is to be the GO TO place for everything related to printing for advertising purposes. We want to serve the marketing and advertising industry with insight, information and inspiration about the effectiveness of printed channels. Without making a distinction between the 'substrate' used. We cover the effectiveness of printed newspapers, magazines, door drops, brochures, (large) format, signage, retail marketing channels and other material.

This provides Print Power a unique position. Marketers and their agencies continue to evaluate media on the basis of effectiveness. Print Power provides them with insights, case studies and expert interviews that will support the decision to include printed materials in the mix, regardless of the type of channel.

This year's Prediction booklet is a representation of this broader scope of Print Power, including interviews with Tyler Brûlé, founder of Monocle, Jennifer Kolloczek from Canon, Neil Felton, CEO of the global FESPA organisation, Tomaso Esposito from paper manufacturer Burgo, Kim Skjoldborg, professor and author of a new book on media planning, Kevin Longhurst, head of media trading agency Magna (part of IPG), Sonoo Singh, founder of Creative Salon and senior advertising and marketing journalist and finally Steve Lister, sustainability director at HH Global.

Finally, I'd like to announce that after having been involved in the work of Print Power since the start in 2009, as of this year, I've taken over the initiative from Euro-Graph, the European Association of Graphic Paper Producers. Despite this decision, paper companies remain strong supporters of the initiative.

What does 2023 have in store for the publishing, printing, paper and advertising industries? The insider view from our experts is truly illuminating...



# ‘IT’S THE JOURNEY FROM PRINTING PRESS TO COFFEE TABLE, TO LETTER BOX, TO DESK - THE DELIVERY ISSUE IS THE PART THAT’S BROKEN’

TYLER BRÛLÉ | EDITORIAL DIRECTOR OF MONOCLE

Editorial Director of Monocle Tyler Brûlé says: ‘The delivery issue is the biggest problem that print has. We can get a Poke bowl delivered to us within a matter of minutes. But the complexity of getting a Sunday newspaper in Germany delivered and the cost that comes with it is astounding...

## POST HASTE

When a piece of print lands in someone’s hand it can be an absolutely magical, transformative moment to get a message, or to get imagery across. Print isn’t the issue. There are great printers, there’s great paper, there are scores of exceptional publishers who do outstanding work. It’s the journey from printing press to coffee table, to letter box, to desk - the delivery issue is the part that is broken. Why is it that you can get heavy, cumbersome, fragile, perishable goods delivered no problem. But somehow there’s a block around newspapers and so many other elements of print? If we have any complaints from our readers, from our distributors, from our advertisers - it’s always about distribution. So I think the big challenge going forward is that we need to have conversations with the retailers, the logistics companies, the postal companies - everybody has to be involved and committed.

## PRINT’S PRESENCE

It’s not just delivery that’s a challenge. When it comes to the availability of magazines in retail outlets and kiosks, I would say the situation is probably at crisis point. There’s ever more space for M&Ms and KitKats and branded water and ever less space for

magazines and books. This is because a lot of decisions are being made by people reading industry reports that say the world is only going to be digital. Getting rid of print makes a kiosk a less interesting place to go. It becomes a world of junk food and items that I’m not convinced everyone wants to purchase.

## READ ALL ABOUT IT!

I think it’s essential we have a resilient, buzzy, engaged and entertaining newsstand. Because if I think about the big brands that we work with, and about the most important cities for us, there is something to be said for being top of mind and being present. If I’m a media planner for a major luxury goods group based in Geneva and I don’t see my core titles displayed at Geneva airport and train station, then I have to wonder if they’re reaching the readers in other corners of the world when they’re not present in the main city where I’m functioning.

## SHOW & TELL

Of course, when a publisher has diminishing margins, it becomes very difficult to be present in as many places as possible. I believe that the retailer and the publisher need to be in lockstep and are able to think things through. Like, what does that wall look like, what do those risers for display look like, and how are they merchandising? We brought out the Monocle Companion last year which is pocketbook size. It’s a very thick, meaty volume of essays, but it hasn’t been designed to be displayed in a traditional, vertical wall system. You can imagine the complexity of having conversations with the distributor, the wholesale partners and the retailers about a special approach to display. Nevertheless, the product has been hugely successful, both I would say because we’ve been able to sell it through our own channels, on ecommerce or through our own stores. →



'It's print's creativity that allowed us to deliver new formats that were able to push the margin for us. We can already see that in 2023, this is exactly what brands are looking for.'

#### AT A PREMIUM

Some of the momentum that we have in 2023, which is probably informed by last year, is a desire for ever more formats. And this is where I think there is a positivity around doing things in print. It's certainly nothing new, but I would say that in the last five or six years and probably because of paper prices and distribution costs, paper has become more of a luxury item.

When brands want to do something which is premium, many are choosing print. I just came back from meetings with a big luxury group and a global US bank in New York. What was interesting was that neither of them considered digital at all. Even though in many ways they're digital-first brands, they do things in print. I would say they probably spend more in the digital space than they do on paper, but they were mostly interested in a format that was even beyond Monocle's traditional trim size and Monocle's traditional paper choice. They wanted to know what else we could do for them.

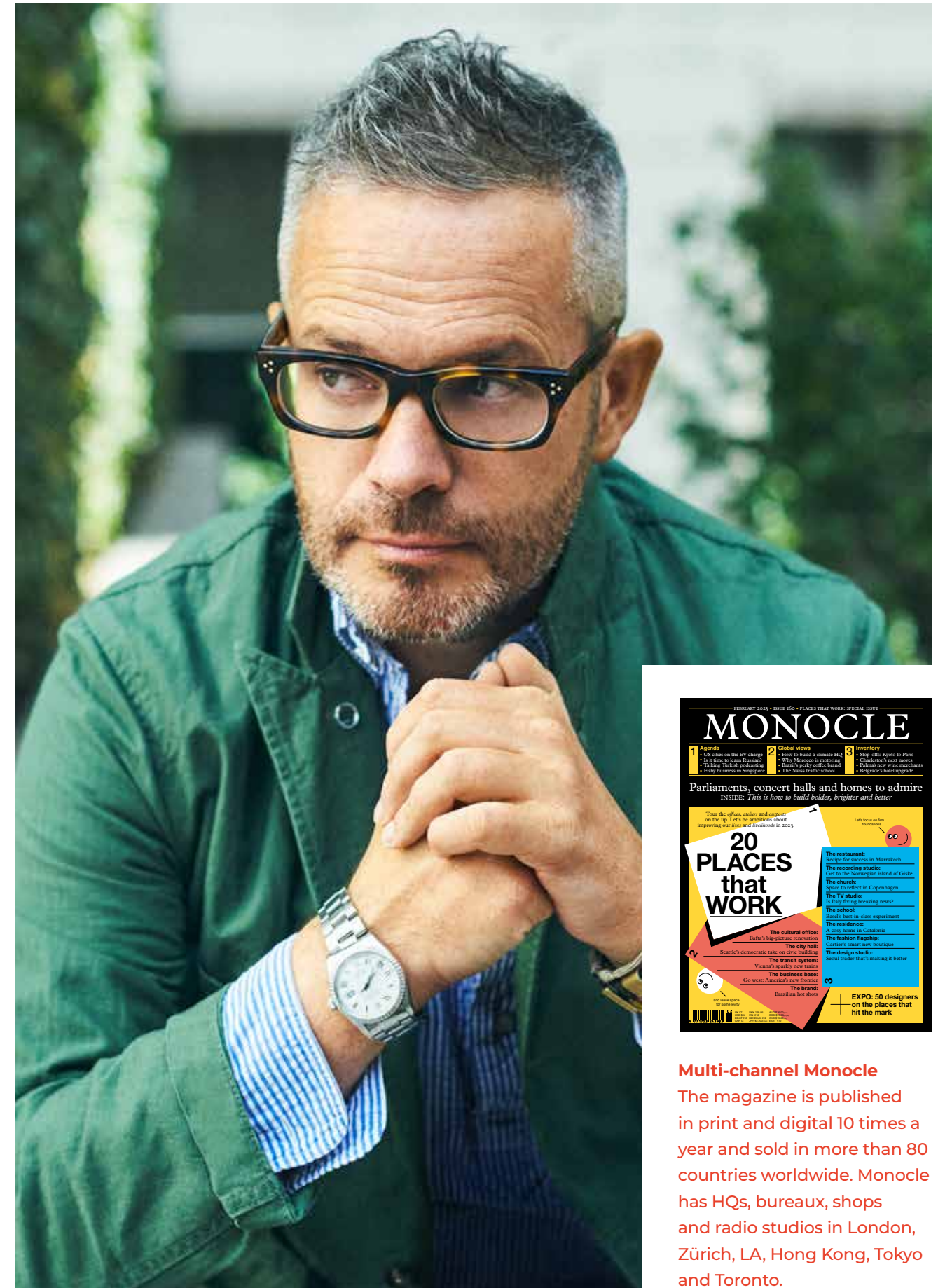
That's because, with print, you're able to get a certain level of cut through and you're able to be in a world of something which is collectible and tangible.

#### CREATIVE LICENSE

It's this creativity that I think resonates with advertisers. With digital format - just by the virtue of where you consume them on a laptop or on a mobile device - you're quite constrained in terms of the actual format. You are boxed in by a frame, whereas we know that it's quite endless in terms of what you can create on a page in a magazine or in newspaper format. When it comes to the relationships we have with companies and brands, I would say that in 2022, it was this innovation in print that really helped to drive our profitability. It's print's creativity that allowed us to deliver new formats that were able to push the margin for us. We can already see that in 2023, this is exactly what brands are looking for.

#### PRINT'S POTENTIAL

Of course, media brands understand this and that's why you do see an investment in print. For Monocle, 2022 was the most successful year for us in print ever. The money we made on paper far outstripped podcasts and other things we've done digitally. It's very much our forecast that it should do the same this year and we can only achieve that by going back to what I was saying earlier. That we need an able print supply, we need realistic print prices and we need to be able to successfully and efficiently deliver our product to the customer. ●



**Multi-channel Monocle**  
The magazine is published in print and digital 10 times a year and sold in more than 80 countries worldwide. Monocle has HQs, bureaux, shops and radio studios in London, Zürich, LA, Hong Kong, Tokyo and Toronto.

# '...HAVING A JOINED UP APPROACH IS GOING TO BE CRITICAL FOR THE FUTURE OF PRINT ADVERTISING'

KEVIN LONGHURST | HEAD OF MAGNA GLOBAL FOR THE EMEA REGION

**MAGNA** is the media investment, innovation and intelligence arm of media agency IPG Mediabrands. They are the trusted global source for predicting the future of media value, economic data, media and consumer consumption trends.

Head of Magna Global for the EMEA region Kevin Longhurst says: 'Looking forward to 2023, I think that the evolution of what investment and trading means is quite an important topic to cover, given that print titles, out of home titles and audio titles have probably been quicker to adapt to changing ways of trading, buying and quantifying value to clients...

## TRADITIONAL VALUES

The evolution of investment is fascinating to me, because it feels far more sophisticated in 2023 than it was even in 2018. Some of the traditional partners have really won out because they've evolved from the traditional sense of investment and trading into the new world of investment and trading, which is around brand safe environments and better value quantification in a different and prescriptive way to clients. I would probably say I've seen more traditional media companies be much more agile and adept at flipping their business to take advantage of that kind of convergence into a new investment, where it's working.

## MIND THE GAP

Magna produces a global adspend report on a biannual basis, and December's report noted that traditional media companies (Television, Audio, Publishing, OOH) saw their advertising revenues grow by +2.5 per cent last year, despite the challenging economic environment, while digital media companies grew by +9 per cent. This the narrowest growth gap ever observed by Magna, signalling that editorial media brands remain as attractive and relevant as they now combine brand safety with cross-platform reach.

## STANDING STRONG

It's also about the nervousness around things like data collection, brand safety, contextually irrelevant presence for clients, fraud, serving outside of the target audience. I think a lot of that implies convergence, in terms of how digital growth is slowing and traditional was actually holding its own despite declining audiences. That 2.5 per cent versus 9 per cent growth that we saw in traditional and digital still happened in spite of a relatively straightforward and normal year from a media buying perspective. I don't think that



difference will be as tight in 2023, but there won't be a massive growth in digital versus a huge decline in traditional. I would suggest that difference will be 10 to 15 points this year.

## THE MULTI-CHANNEL BOOST

And I think that's where we've seen a lot of success – where people are managing audience decline by ensuring that their product is fit for what our multimedia plan looks like in 2023. What does come out is that the cross-media sale is pivotal. We've only started measuring that in the last two to three years. Taking Mail/Metro as an example, they capture everything in an instant across print, sponsorship, digital and video. And I think having a joined up approach is going to be critical for the future of print advertising. The numbers suggest that the cross-media sale is central to the limited difference that exists between the growth of traditional and digital. I think measurement is absolutely key. And having some form of consistent currency unit that exists across any multimedia campaign is very important. ●





Head of Sales and Marketing at Burgo Group and board member at Euro-Graph Tomaso Esposito says: 'After two years marked by epochal changes due to the pandemic period, 2022 proved to be the most standout year of the decade, with the first phase bringing great economic and consumer recovery and the second being characterized by uncertainty...

#### IN THE FACE OF ADVERSITY

The key word of the year was unsurprisingly 'volatility'. But in the end, I don't think the overall trend was any different from our initial expectations. Advertising sales didn't experience any significant decreases, even if a large part of that continues to be channelled out of home. But there's no doubt that the printing market has suffered the effects of this uncertainty, with exceptional increases in raw materials and energy, leading to sharp price rises in paper, inks and logistics. However, we have also recorded marked accelerations of the processes that have been on the agenda for years. First of all, I'm really encouraged that in the search for sustainable products, fiber-based products are finally recognised as a true green medium after years of painful environmental criticism.

#### PLUS POINTS

I can't say that 2023 doesn't bring any less uncertainty, but the year's buzz words are 'effectiveness' and 'sustainability'. I'm

in no doubt that higher costs mean that advertising spend will be increasingly focused on the effectiveness of the media and its contents – and that's where printing and packaging excel. We can expect less generic investment - so fewer printed copies. And I predict that the focus will instead be on distinctive, customized print that's more effectively targeted to the consumer.

#### PRINT HAS ITS PLACE

With that in mind, because of digital printing's flexibility and sustainability compared to traditional printing, I foresee its growth within the publishing, commercial and packaging sectors. But I think it's crucial we avoid the cannibalization of traditional and volume printing, and see digital as a compliment to it.

With this increasing need for efficiency, I believe the digital OEMs should be talking directly to print media producers to find industrial solutions for a market with lower

'...ADVERTISING SPEND WILL BE INCREASINGLY FOCUSED ON THE EFFECTIVENESS OF THE MEDIA...'

TOMASO ESPOSITO | HEAD OF MARKETING AND SALES EUROPE, BURGO GROUP

numbers and higher costs per copy. Paper producers in turn will have to respond to these inevitable trends by seeking a balance in cost, availability, industrialization, waste reduction and environmental impact – all in a way that's compatible with ESG criteria.

#### GREAT EXPECTATIONS

Finally, I think that what were once the so-called special products (or paper specialities) will no longer be considered just niche. But rather, they'll be versatile enough to adapt to customer demand, new trends and the sustainability expectations of today and tomorrow. ●

**BURGO GROUP** is a producer and distributor of graphic papers, containerboards and speciality papers and sells its products in more than 90 countries. With the sale of 2 million tonnes of paper in 2021, they're a leading partner for those working in the graphics, printing, publishing and packaging sectors. They have 10 plants - nine in Italy and one in Belgium.

# ‘DIGITAL PRINT HAS ALL THE AGILITY OF DIGITAL MARKETING, WITH THE ADDED MAGIC OF BEING A TACTILE, SENSORY MEDIUM...’

JENNIFER KOLLOCZEK, EUROPEAN PLANNING, MARKETING & INNOVATION  
SENIOR DIRECTOR, PRODUCTION PRINT | CANON EUROPE

**CANON EUROPE** offers the industry's broadest portfolio of digital printing solutions and services. As the only company in the world to rank in the top 5 for the past 37 years for the number of US patents granted, they invest heavily in R&D and advanced print technologies.

Senior Director, Production Print at Canon Europe Jennifer Kolloczek says: 'The last three years have dramatically reshaped how brands interact and communicate with audiences. We've seen the rapid and sustained rise of e-commerce, leading many businesses to reimagine the role of retail spaces and the shopping 'experience'...

#### EXPLORING POSSIBILITIES

This is stimulating brand owners and their agencies to think again about how they can engage with shoppers, whether that's remotely or in person. At Canon, we're innovating in areas of technology that are critical to how brands communicate – promotional print, retail graphics and décor, publishing and business communications, for example. These days, brands have to grab customers' attention at each stage of the buying journey, and use the data points they've gathered from every interaction to deliver tailored services and products. This level of targeting helps customers to feel more valued, as well as stimulating cross-selling and repeat purchases.

#### UNLOCKING OPPORTUNITIES

By expanding print's possibilities, we're helping brands to maximise the impact of every touchpoint with customers – from out-of-home campaigns and immersive branded spaces to targeted direct marketing and personalised packaging. And we're supporting brands to radically reduce time

to market for promotional print, increase its effectiveness within their multi-channel campaigns, and unlock new sales and marketing opportunities through mass customisation and personalisation.

#### CARBON COST

There's another sustained marketing trend that we should hold the light up to. Working against a tough economic backdrop and under pressure to make more environmentally conscious choices, many brand marketing teams are still diverting spend from print to digital/online channels. I'd encourage brands to carefully consider the effectiveness of this tactical choice, because digital marketing on its own isn't the ultimate ideal solution that many perceive it to be. Firstly, from an environmental standpoint, email and digital marketing contribute towards vast energy usage by data centres and have a significant carbon footprint. And when you look at the large number of marketing emails that go straight into 'Junk' folders or are deleted, it's clear that much of this energy, cost and effort goes to waste.

#### CAMPAIGN WITH CUT THROUGH

To optimise campaign reach and ROI, brands need to consider a broader range of media, and use all the tools at their disposal to cut through with digitally-fatigued consumers. Digital print has all the agility of digital

‘We know that high-quality print, even in small quantities, can make brand communications so much more cost-effective and powerful.’

marketing, with the added magic of being a tactile, sensory medium that invites engagement in a way email just can't. We know that high-quality print, even in small quantities, can make brand communications so much more cost-effective and powerful.

**FAST RESULTS**

What brands may not understand is that today's digital print-on-demand technology, combined with clever workflows, makes it possible to totally automate production of time-sensitive, personalised, printed direct marketing assets, using their real-time sales and marketing data. The timelines of this 'programmable print' come very close to digital marketing, and it's already delivering compelling commercial results for brands.

**CALL TO ACTION**

I would also say that, post-COVID, real-world connections have become more important for most of us. Where brands connect with consumers in real life — in bricks-and-mortar retail spaces for example — print can play a

vital role in driving footfall. It helps to create visual impact, increase dwell time, promote exploration and drive purchase. Print can also stimulate interaction with digital channels – for example by driving consumers – through personalised direct mail at home or interactive POS material in-store – to specific online product information and offers. Every interaction helps to enrich the brand's understanding of consumers' behaviour and preferences.

**VERSATILITY IS KEY**

In 2023, I think that brands that want to stand out from the crowd and build more meaningful relationships with customers need to look beyond standard digital and print marketing collateral and finally get past the 'spray and pray' approach, which is still all too common, even in the age of 'big data'.

Most brands hold the insight to drive ultra-targeted campaigns that demonstrate far deeper understanding of their individual customers, both in the digital sphere and using physical media. In a multi-channel world, I'd urge brands to make better use of timely, targeted, creative print. It's a great way to stimulate response, nurture brand loyalty and achieve exceptional return on marketing spend. ●



‘I'd urge brands to make better use of timely, targeted, creative print. It's a great way to stimulate response, nurture brand loyalty and achieve exceptional return on marketing spend.’



# 'THERE IS EVIDENCE THAT DIGITAL CLUTTER MIGHT BE DRIVING BRANDS TO CONSIDER PRINT'

SONOO SINGH | FOUNDER, CREATIVE SALON

**CREATIVE SALON** is a platform that champions excellence in commercial creativity and supports the people and the companies who make it. Its ambition is to help secure a strong future for the advertising and marketing industries by doing whatever they can to nurture the next generation of diverse talent.

Founder of Creative Salon Sonoo Singh says: 'Decades ago, growing up in India with little access to libraries and no money to spend on magazines and books, my love affair with print started. Print was not just a means of communication, but a form of sensory stimuli - and I found myself devouring my parent's paper grocery bags that were recycled out of old newspapers and magazines...

## BRAND VALUE

From matrimonial ads to beauty campaigns and local stories about a man biting a dog - I consumed it all. Print stood out for me. And when I first arrived in the UK more than two decades ago - one of the few countries where there's a choice of established print media distributed for free (almost entirely dependent on ad revenue and commuter traffic), I understood better about the power and the authority of brands enhanced by print. Fast forward only a few years later, and the majority of print media titles continue to be under pressure, with surging newsprint costs adding to the longer term trend of declining subscriptions and advertising costs. So what of the future?

## PROVING PRINT'S WORTH

I understand that when asked 'is print dead?' - the argument cannot be binary. That feels increasingly like yesterday's debate. However, let's also not forget that in an environment where economic stress is forcing brand owners to scrutinise and optimise every channel, tactic, and campaign - print, as we know it, will continue to flounder in tough times. A recent Reuters survey says that more newspapers will stop daily print production this year due to rising print costs, weakening of distribution networks and diminishing ad revenue. We may also see a further spate of titles switching to an online-only model. Are there any reasons to be cheerful then?

## DIGITAL'S LOSS

There is evidence that digital clutter might be driving brands to consider print. Last month, General Electric took over The New York Times' print advertising for a day, amounting to 22 full-page colour ads as well as five partial pages. Omnicom-owned ad agency TBWA paid for its 'Last Ad from the Last Big Ad Agency on Madison Avenue' full-page ad in The Times, advertising their



move to a different location in Manhattan. In India, advertisers have been aggressively using QR codes in print as the new call to action. In the UK, brands that have been experimenting with print's unique ability to create awareness, hold attention and drive commercial actions are achieving stand-out. For example - last year, Confused.com released comic-strip-style print ads titled 'the Confused.comics'. Created by Accenture Song, the 'comics' offered a light-hearted commentary against the increasingly confusing times in the UK.

## OPPORTUNITY KNOCKS

Six years ago, when the last print edition of women's glossy Glamour was printed in the UK, it was also the time when counterculture print titles were seeing a rise in popularity, catering to a niche new audience and attracting brands that wanted to engage with them. My obsession with fashion brand ME+EM is enhanced further with its print catalogue. With that in mind, the next few years will be defined by how we can transform print into something more relevant and useful to a new audience. ●

# ‘THERE’S A HUGE AMOUNT OF MYTH AND IGNORANCE AROUND MEASURING COMMUNICATION’

KIM SKJOLDBORG | LECTURER, UNIVERSITY OF SOUTHERN DENMARK

**KIM SKJOLDBORG** is a lecturer at University of Southern Denmark where he teaches marketing communication and media planning. He has a background within the marketing and media industry and has his own consultancy.

Marketing communication and media planning lecturer Kim Skjoldborg says: ‘There’s a huge amount of myth and ignorance around measuring communication and media planning. Something that I address in Marketing Communication and Media Planning - my new book out in 2023 on the Danish market that’s directed at both marketing students and practitioners with the field...

## MARKETING MANUAL

The book focuses on the interplay between message, target audience and media. The holy trinity for a successful campaign. A hallmark of the book is the strategic approach and the fact that it contains the latest research about how marketing communication works. I cover the entire process from idea to media selection and the importance of context in media planning.

## SHIFTING PERSPECTIVES

I’ve collected what I consider to be the most solid knowledge I can find at the present time. But what the data tells us now will probably be different in three or five years. We’re constantly becoming wiser, which makes this entire field extremely fascinating.

## REALITY BITES

There’s an ignorance around the effectiveness of different channels, including print. When I ask my students to rank how effective different media groups are, they get it wrong from a theoretical point of view. This is explained by Daniel Kahneman and the availability heuristic. It means that we talk about and we believe what is in the media and what we hear. People talk about digital media all the time and consequently, they overestimate its effectiveness. Video and YouTube has an impact and an influence, but actually, some of the digital elements like display ads are a very costly way of advertising because 50 per cent is eaten up within the supply chain. People often get an unbalanced view, but when you present the data, people are actually willing to listen. When my students see how print is actually rated and how effective it is, something clicks in their head. My approach to the markets is to educate advertisers so they can have a much more balanced discussion with advertising and media agencies to come to the best marketing solutions.



## PAY ATTENTION

I try to emphasise that the entire crux of media planning is about the amount of attention you get. To me, that’s probably one of the best pitches to actually underline the strength of print. In Australia, there’s a company called Amplified Intelligence owned by Dr Karen Nelson-Field. She’s leading the way in the area of trying to sell attention. We’ve got Lumen in the UK, who are promoting exactly the same message. I’m trying to spread that same message and my prediction is that it will become more and more relevant in the future.

## MULTI-CHANNEL RETURNS

But people also have to realise that all media works in synergy. Because when you go from one media type to five, it more or less increases efficiency by about 35 per cent, which is a lot. It’s because all media types have diminishing marginal returns, which means that if you stay in one too long, then at some point it’s going to get negative. Digital gets negative quite fast compared to other media types. ●



Director of Sustainability for HH Global Steve Lister says: 'We used to have a dilemma in sustainability or procurement and that was cost versus functionality and quality. And it was easy to navigate this dilemma and pull those levers, because if you wanted less quality, the price would go down. But sustainability threw in a third one...

#### THE POWER OF THREE

We call it the trilemma. You now have cost, you have functionality and quality. But now you have sustainability too. And all three of those are now pulling on each other. And that's where the difficulties and the challenges lie. Because you can go and find a small, boutique, niche paper company that makes these beautiful fibres. But the costs are going to be higher, because they don't make mass produced paper or mass-produced oil-based plastics. The challenge moving forward is, as we move away from mass produced pulp or pre pulp, how do these small niche producers get volume up and prices down? That's a big challenge.

#### SCHOOLED IN SUSTAINABILITY

One thing we have noticed is that there's a knowledge gap that's opened up around sustainability. And that knowledge gap is now big. It's a chasm. People want to get onto the sustainability bandwagon. And when you ask people, what do you want to do? What's

your goal? What's your mission? Why do you want to do this? They don't actually know.

#### COMING FULL CIRCLE

At HH, we have a very structured approach where we adhere to 24 sustainable principles across six lifecycle stages when we're producing marketing materials. Our thinking is, is if you don't report it, and if you don't measure it, then you can't manage it. We work on those 24 principles across the six life cycles - design, materials, suppliers, production and distribution. Then we look at end of life. It's Mobius with a twist.

#### MEASURE FOR MEASURE

We've created our own proprietary software which measures CO2. Everything passes through what's called our sustainability hub, which has externally verified data points from environmental databases like ecoinvent. Sir David Attenborough once said that saving our planet is now a communications challenge. With that in mind, no one has a clue about

# 'MORE THAN 80 PER CENT OF THE CONVERSATIONS I'M HAVING ARE ABOUT PHYSICAL PRINT'

STEVE LISTER | SUSTAINABILITY DIRECTOR - GLOBAL BRANDS & RETAILERS, HH GLOBAL

the impact of digital. That every time you send an email, there's a CO2 impact of the server used. We can work out the sustainable impact of digital marketing campaigns too. Moving to digital is not always a sustainable answer. Rather, we want to speak to our clients about having a blended marketing campaign.

#### PRINT'S PHYSICALITY

I would say that at the moment, more than 80 per cent of the conversations I'm having are about physical print. As you go around the world, digital is not mature in certain countries. So physical print is still here and it's still going to be the dominant factor for us. ●

**HH GLOBAL** is the global leader in tech-enabled creative production and procurement. They deliver a brand's marketing campaign through industry-leading technology, and are the global leader when it comes to sustainability capabilities.





CEO of FESPA Neil Felton says: 'In 2023, I hope we'll see businesses moving out of 'survival mode' by sharing ideas and looking at problems from different angles to see business opportunities and new avenues for profitable growth. After three years in 'fight-or-flight', the appetite for new perspectives on how to adapt and move forward is enormous...

#### EFFICIENCY DRIVE

In my conversations with our global community, three key trends surface regularly – automation, sustainability and personalisation – which I predict will continue to drive change in 2023 and will be strongly represented at our landmark FESPA Global Print Expo event in May 2023 in Munich.

#### PLANET CONSCIOUS

Firstly, automation and process optimisation will continue to play a big role this year in maximising efficiencies across the production chain. From a brand owner and agency perspective, automation enables products to get into stores more efficiently, at a reduced manufacturing cost and with less associated waste. Therefore, brands can be more dynamic and responsive to changing consumer behaviour and selling patterns.

Secondly, the spotlight is on sustainability, as corporate brands put pressure on their print and signage partners to offer more 'planet-

friendly' options for out-of-home, event and point of sale graphics and other types of visual communication. Automation plays a major role in reducing waste, but we're also expecting print buyers to have more consideration for the technologies and inks being used to produce their products, and the materials they're made out of.

Thirdly, personalisation is a hot topic. Forward-thinking print businesses have seen the opportunity for individualisation that came with the shift to digital production, though many brands have yet to fully grasp the commercial value of personalisation, let alone embrace its full potential. Now we've reached a tipping point where the creative and technical capability is matched by widespread and immediate demand.

#### TAILORED & TARGETED

Consumers everywhere want experiences that are personalised, instant, and augmented. Brands that embrace personalisation are

**'BRANDS THAT EMBRACE PERSONALISATION ARE SHARPENING THEIR COMPETITIVE EDGE...'**

NEIL FELTON | CEO OF FESPA

sharpening their competitive edge. But to get to grips with personalisation, it's key for brands to de-mystify their view of its value by witnessing the full extent of real-time customisation in action.

#### GETTING PERSONAL

That's why we're launching Personalisation Experience, a brand-new experiential showcase and multi-day conference. Geared towards brand owners, marketers and agencies, the event will zone in on how to harness personalisation to enhance or differentiate products in areas including personalised loyalty marketing, sportswear and fashion customisation, and personalised packaging. ●

**FESPA** is both an exhibition organiser and a global membership organisation with members in 57 countries. At the heart of what they do are global events, where delegates can explore a wealth of product innovations for digital wide format, screen and textile printing as well as signage and visual communications.

## **What is Print Power?**

Print Power is an initiative that promotes printed media for use in integrated advertising and retail campaigns. Printed media include newspapers, magazines, direct mail, door drops, books, (large format) posters, signage and other material printed on paper, vinyl, polyester, textile or other substrates.

Want to arrange an online session? A presentation at your conference? Or are you simply interested in a better understanding of print in the advertising mix? Call, mail or connect with

**Ulbe Jelluma 00 32 478 600084**  
**[ulbe.jelluma@printpower.eu](mailto:ulbe.jelluma@printpower.eu)**



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