

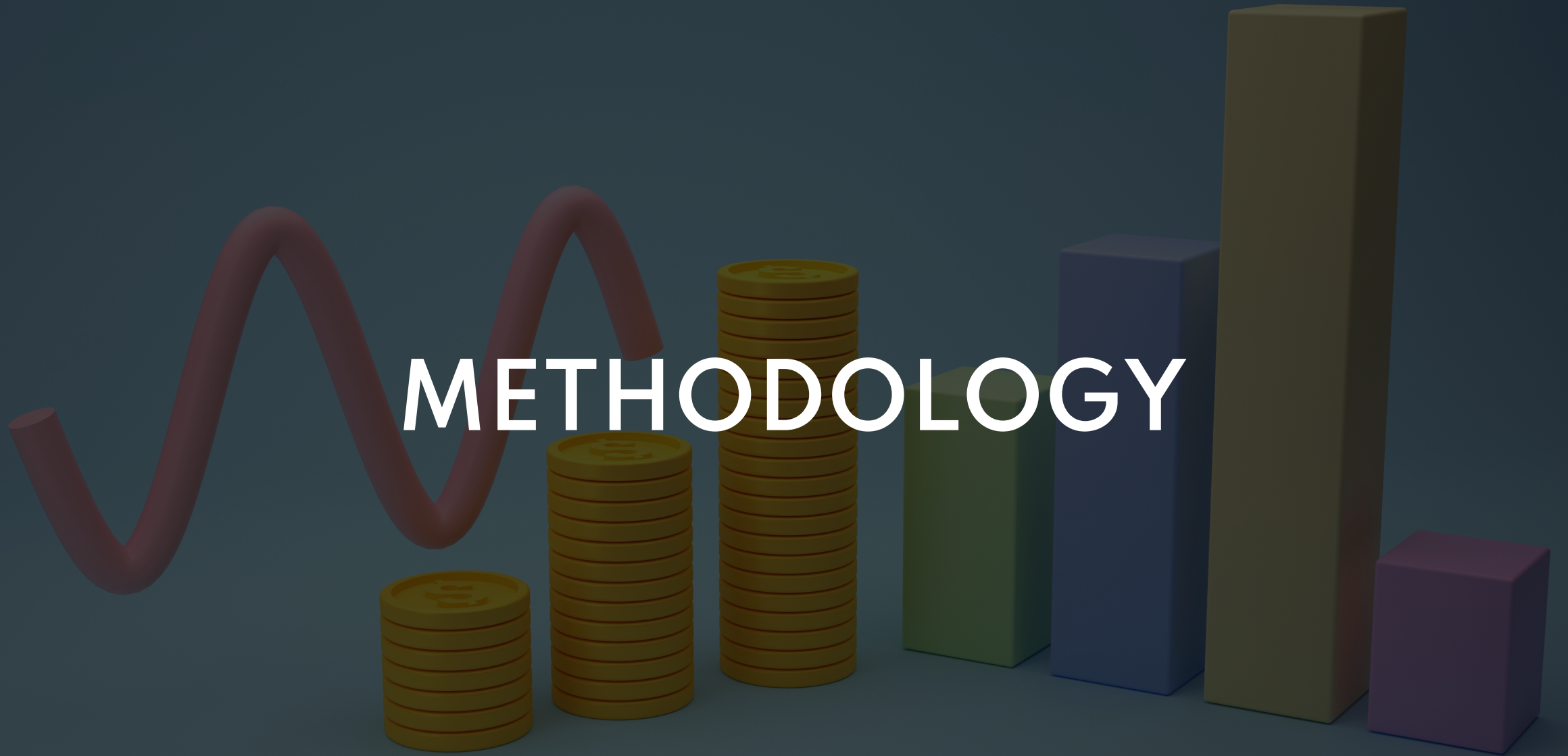
Study:

# From paper to digital: How French retailers shift their communication strategies?

January 2022



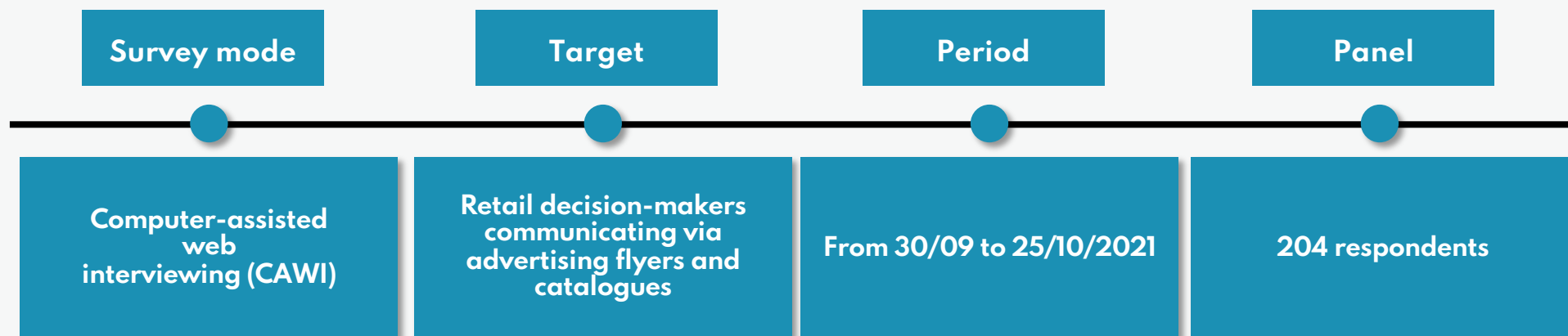
# METHODOLOGY



# Methodology

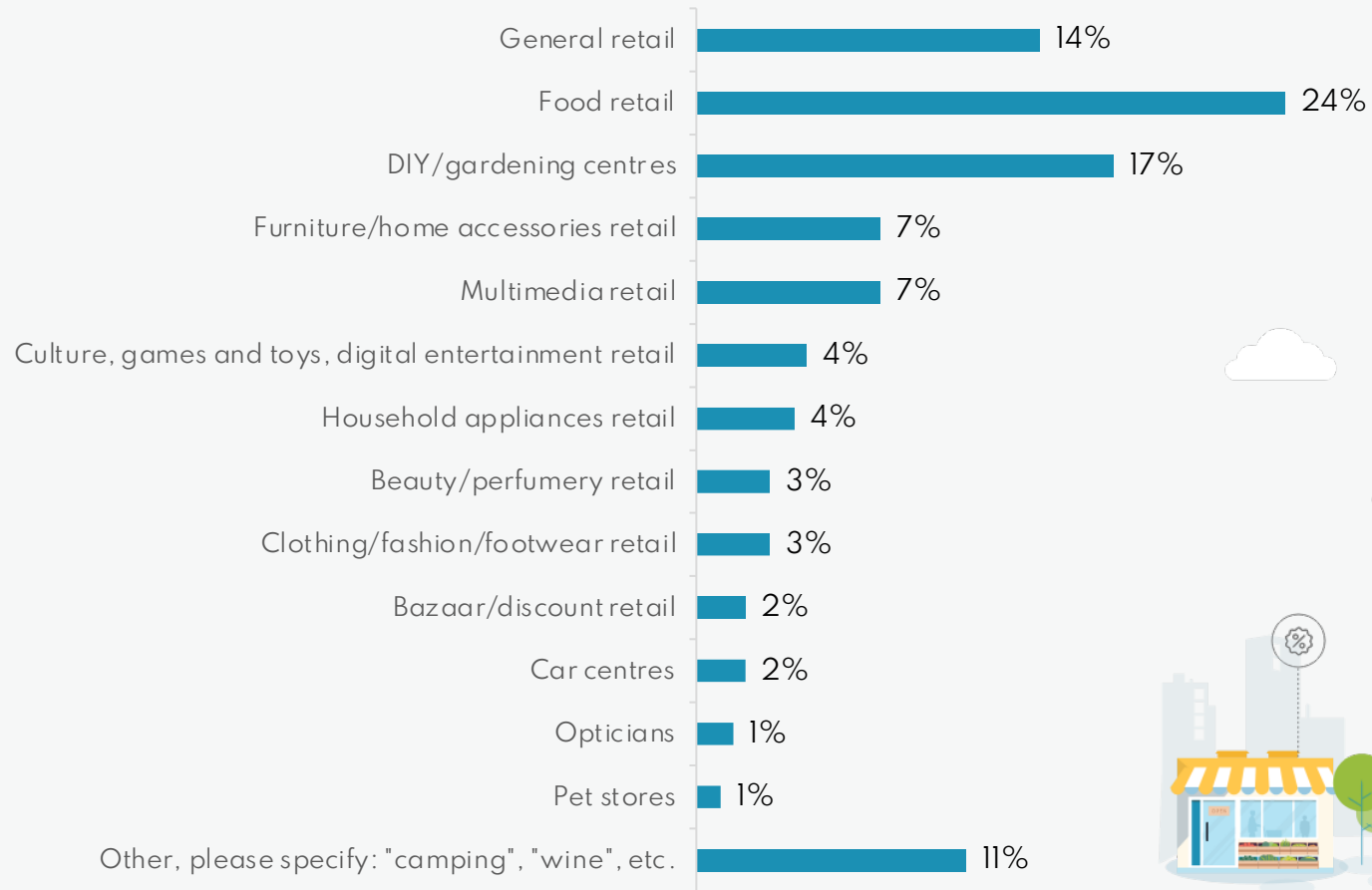
## More than 200 Retail decision makers surveyed

It is compulsory for any total or partial publication to use the full reference “**Infopro survey for Bonial and LSA**” and no work involving this survey may be dissociated from this title.



# Panel

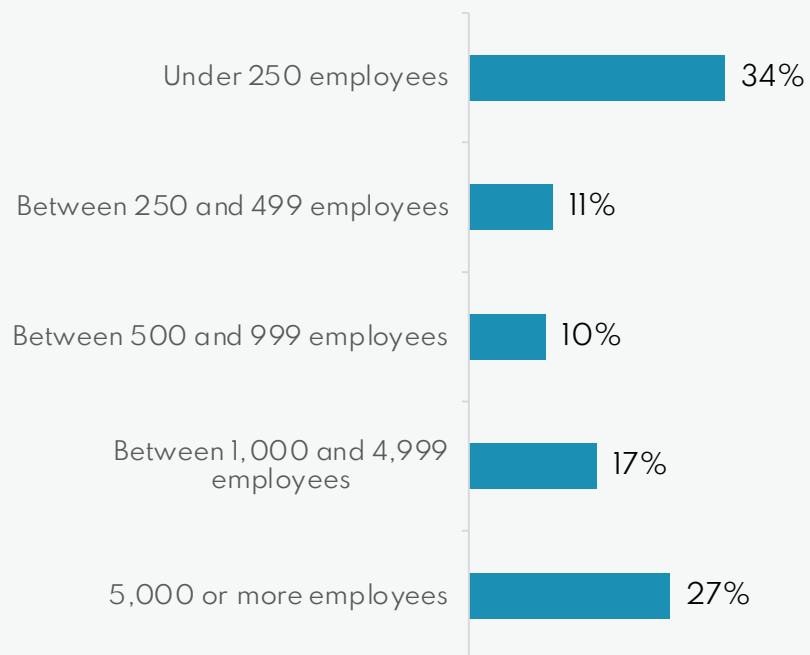
## A panel made up of retailers from various sectors



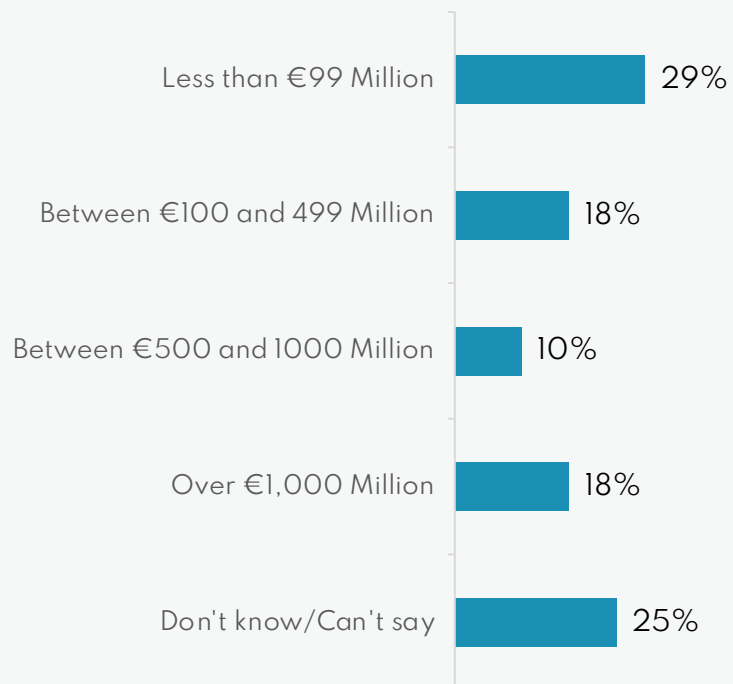
# Panel

## A panel composed of retailers of all sizes

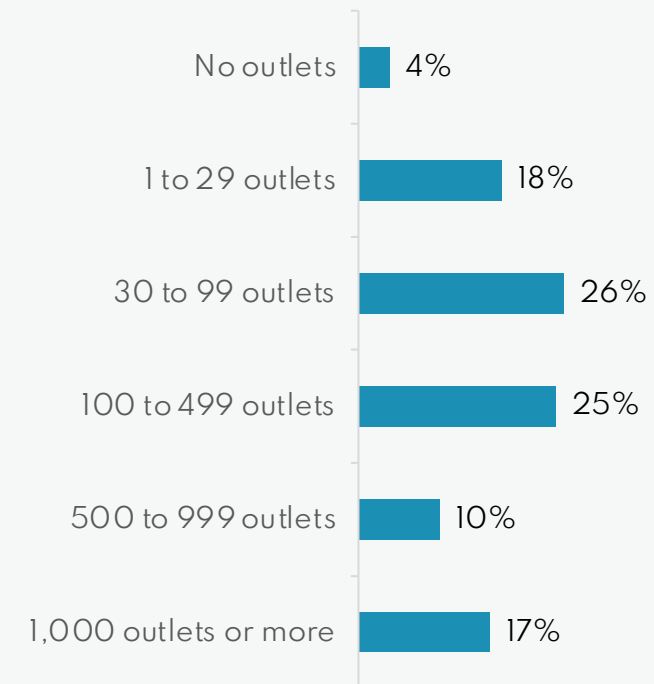
### Workforce



### Turnover

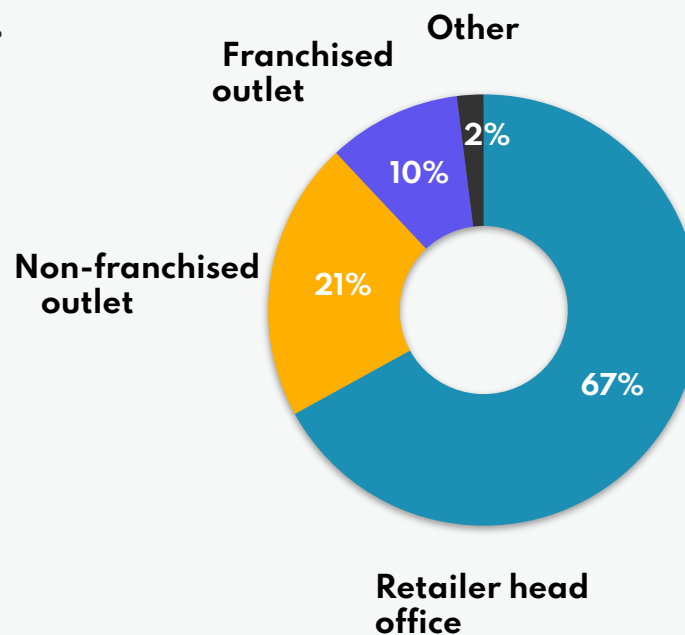
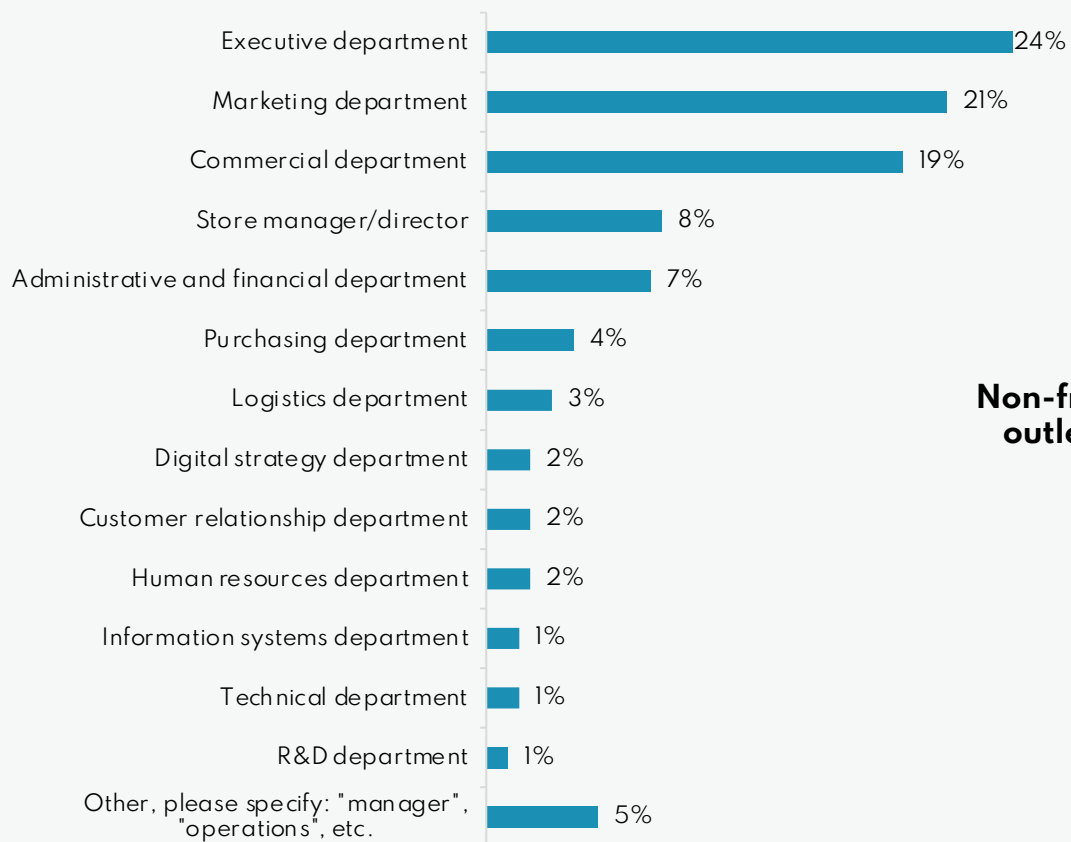


### Stores Network



# Panel

A panel composed of various job roles, both at head office and in the field

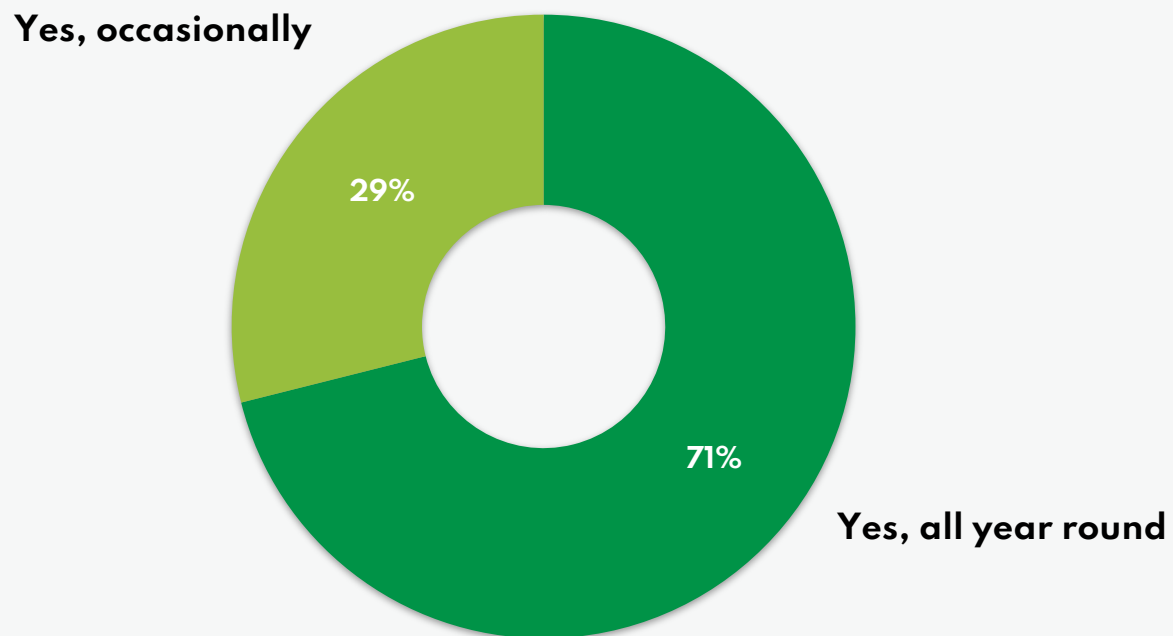




**RESULTS**

# Over 7 out of 10 French retailers send printed communications throughout the year

Question: Does your retail company send communications using advertising flyers and catalogues (either paper or digital)?



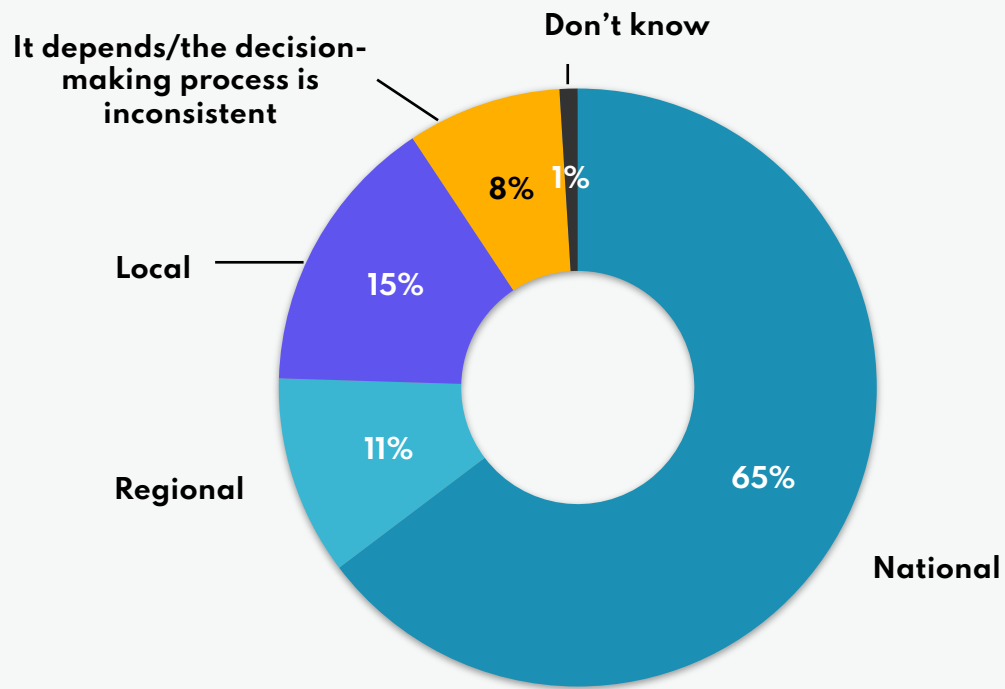
Together (204 respondents) – One answer per line



# Stores communication is managed on a national scale, especially for retailers that have over 30 stores

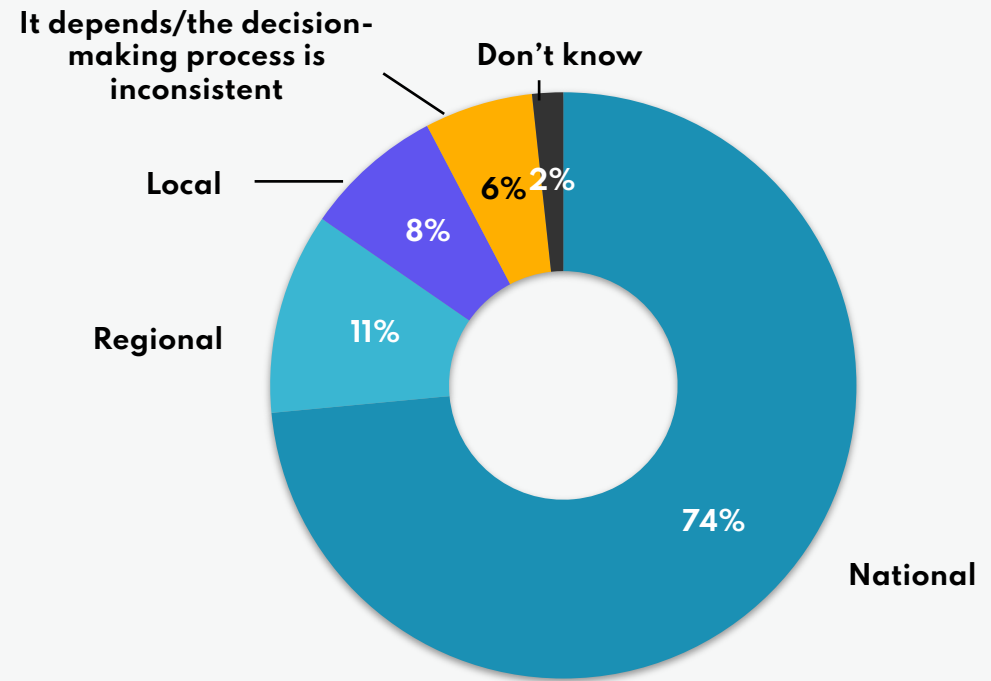
Question: Your retail company sends advertising flyers and catalogues on the following scale...

**All respondents**



204 respondents

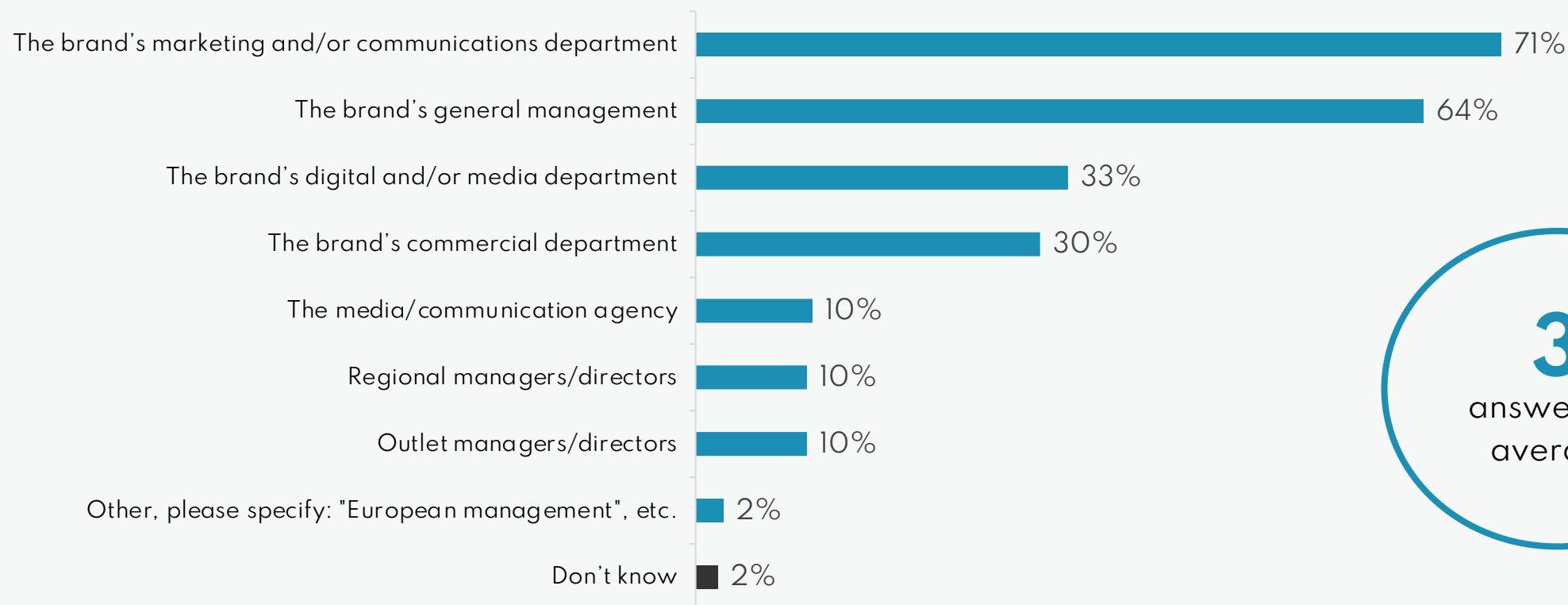
**Respondents from head office roles at retailers with over 30 outlets**



117 respondents

## Stores communication is managed by various job roles at head office

Question: At your retail company, which people are involved in the decision-making for digitalising your advertising flyers and catalogues?

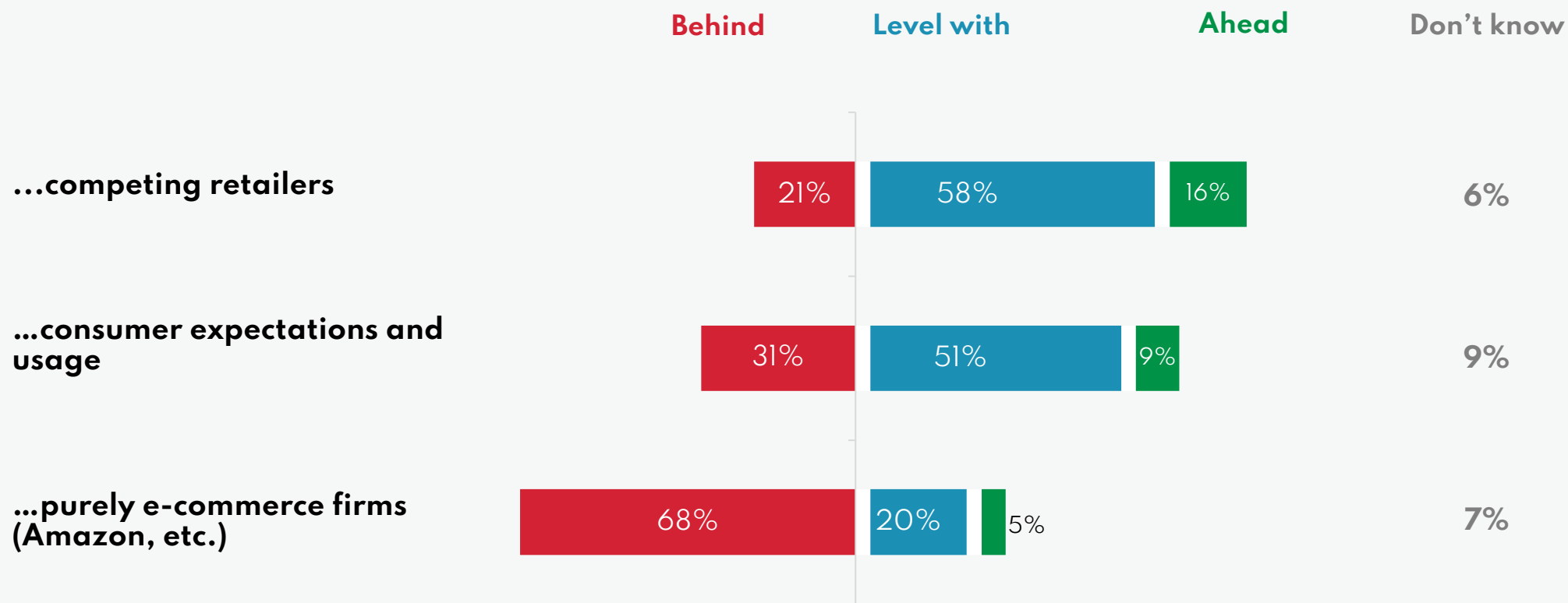


**3**  
answers on  
average

Together (204 respondents) - One answer per line

# Retailers feel that they are lagging behind in terms of digital transformation compared to purely e-commerce firms

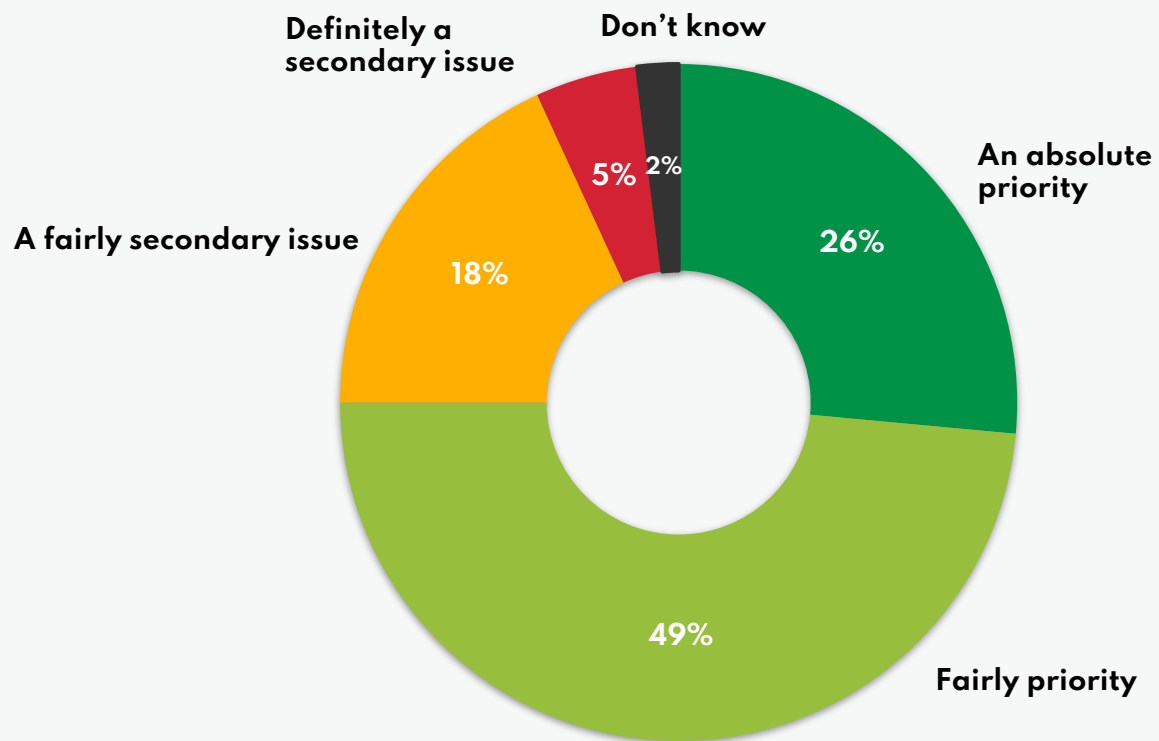
Question: In terms of digital transformation, is your retail company ahead or behind when compared to...



Together (204 respondents) - One answer per line

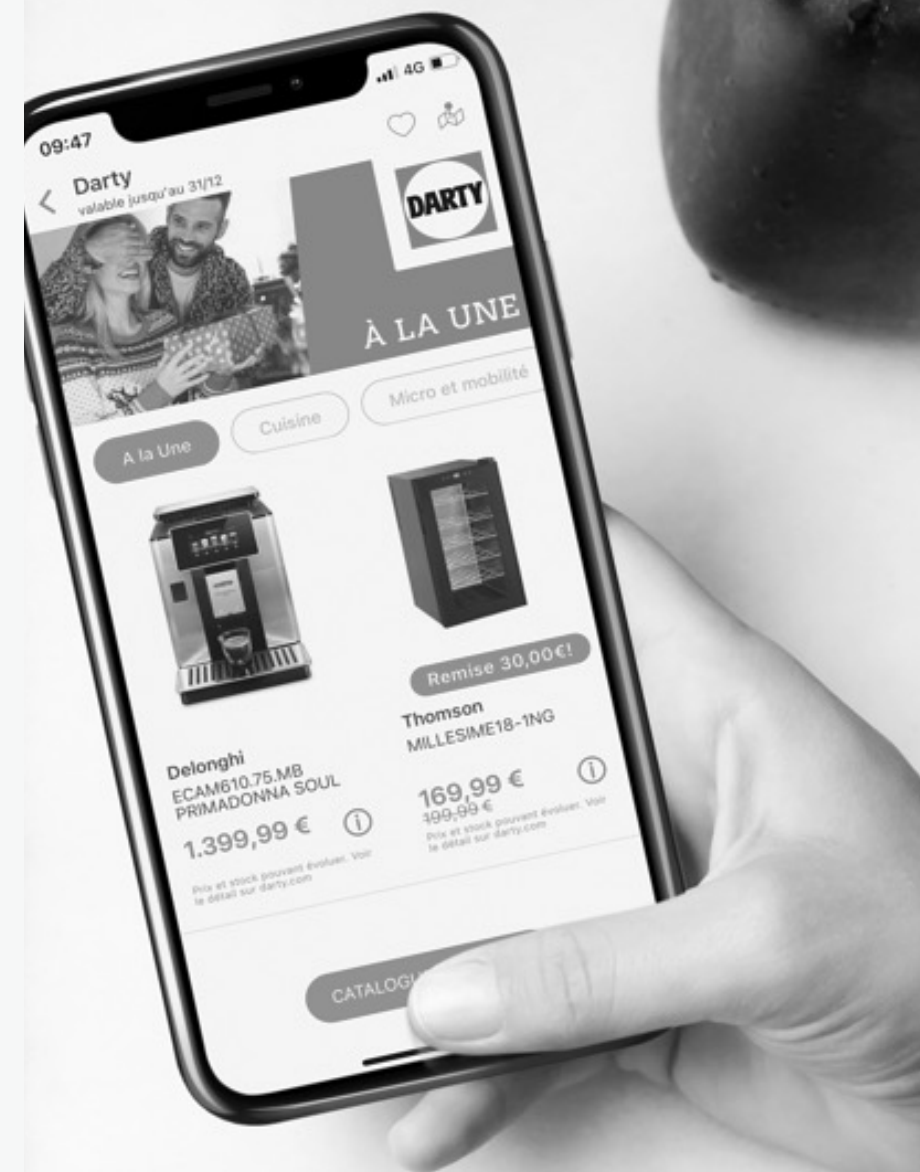
# Digital communication is a priority topic for 3 out of 4 retailers

Question: Digitalising advertising flyers and catalogues at your retail company is a challenge that it considers to be...



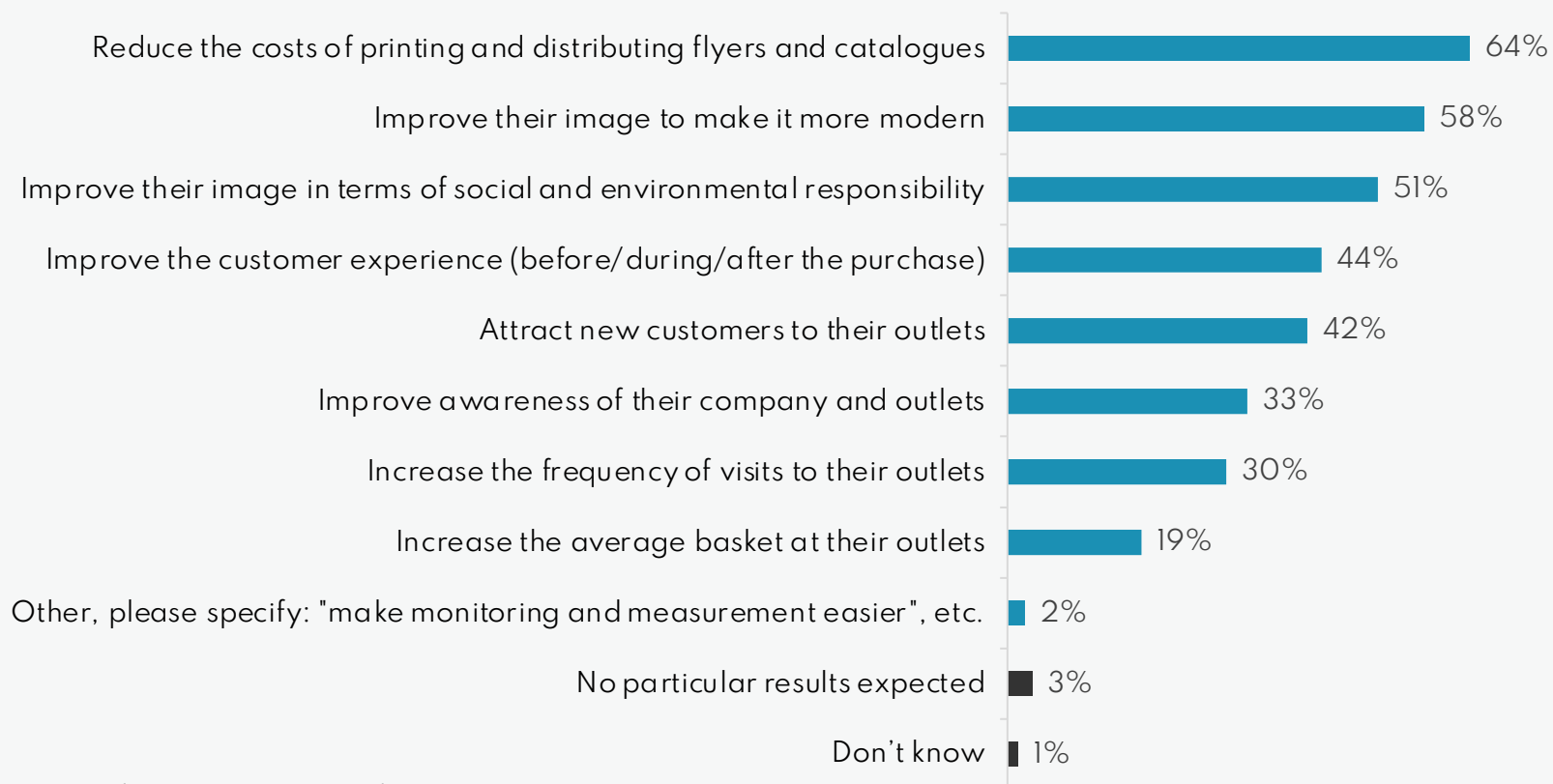
Together (204 respondents) – One answer per line

Infopro survey for Bonial and LSA, January 2022



# 64% of French retailers hope to reduce paper costs through Digital

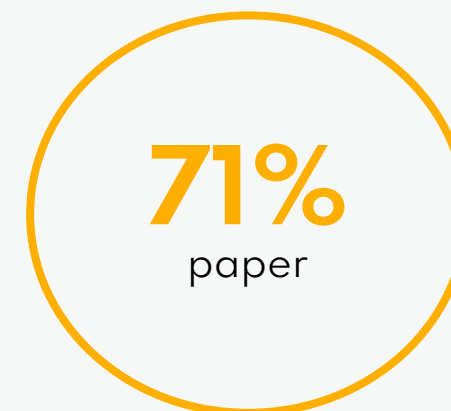
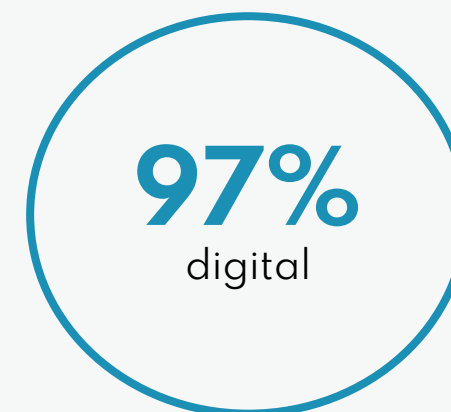
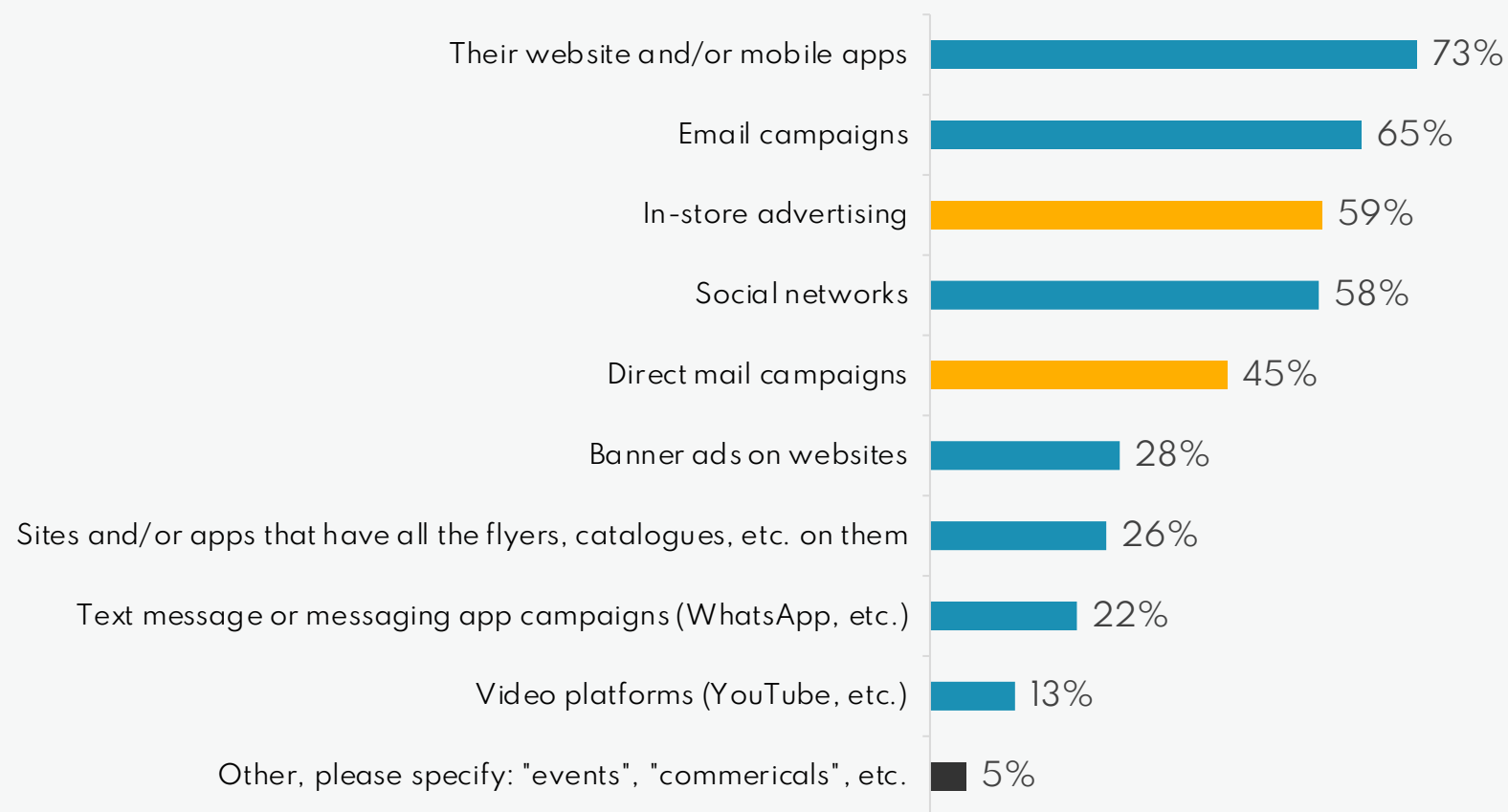
Question: By digitalising their advertising flyers and catalogues, does your retail company hope to...?



All using digital - 60 respondents - One answer per line

# Digital is the 1<sup>st</sup> media of French Retailers

Question: Which source(s) does your retail company use for advertising flyers and catalogues?

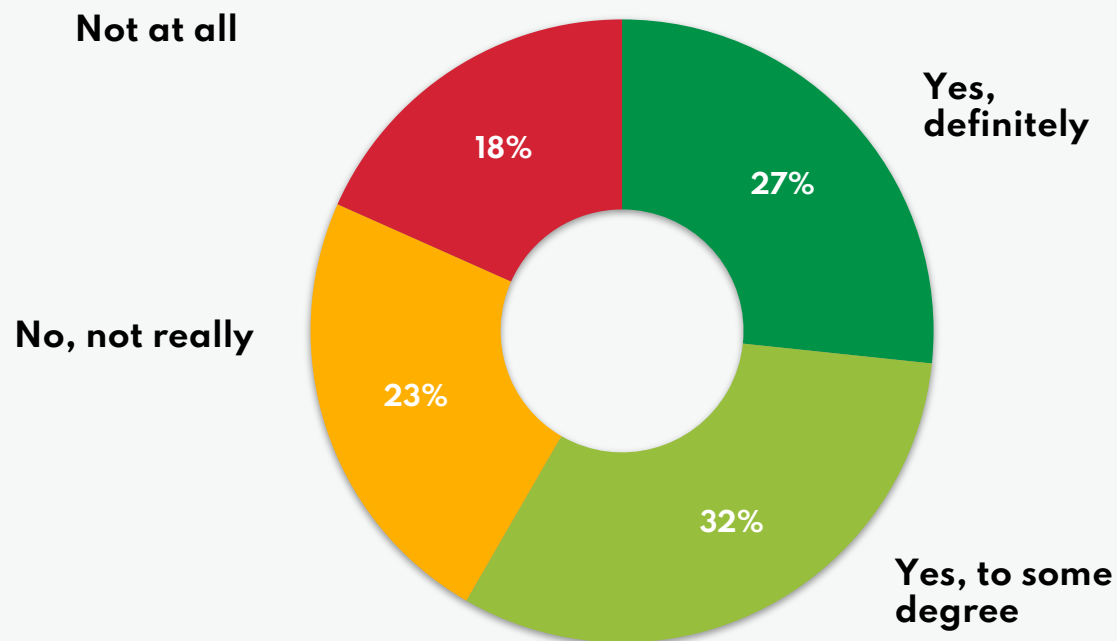


All (204 respondents) - One answer per line

Infopro survey for Bonial and LSA, January 2022

# 59% of French retailers that digitalise their catalogues let their customers know about it

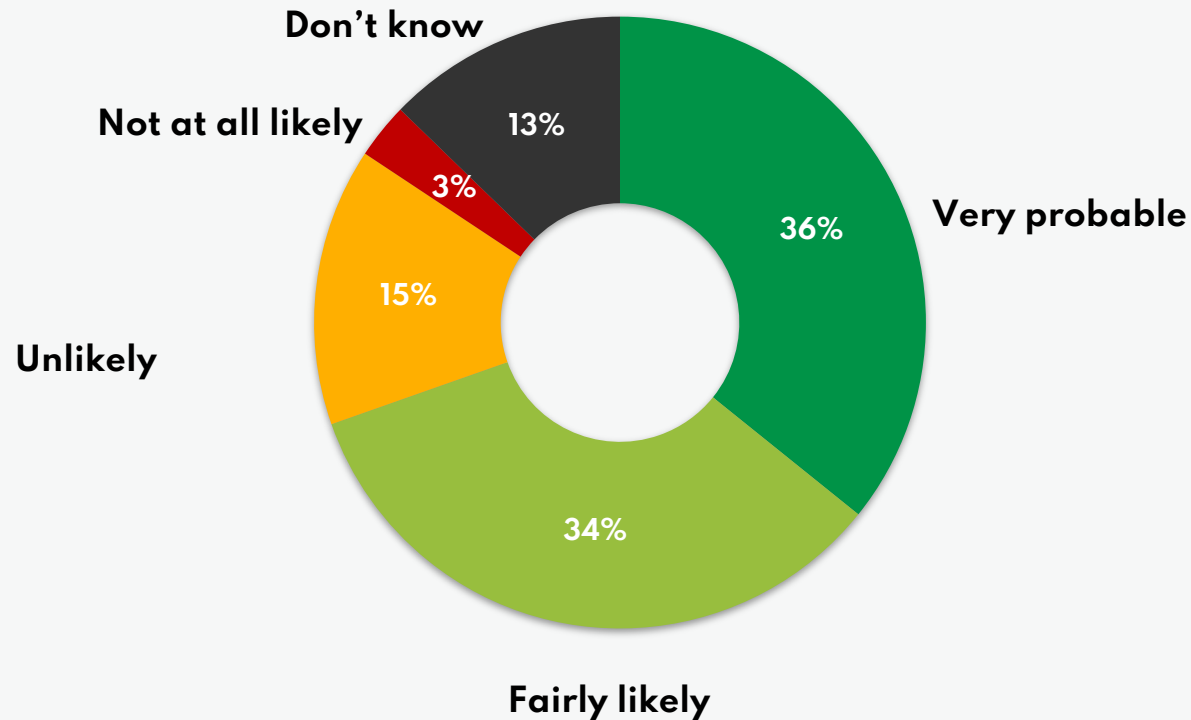
Question: Do you tell your customers when you digitise advertising flyers and catalogues?



All using digital - 60 respondents - One answer per line

# 70% of French retailers believe that the "Oui Pub" project (an initiative to restrict direct mail advertising to households) will be rolled out nationally

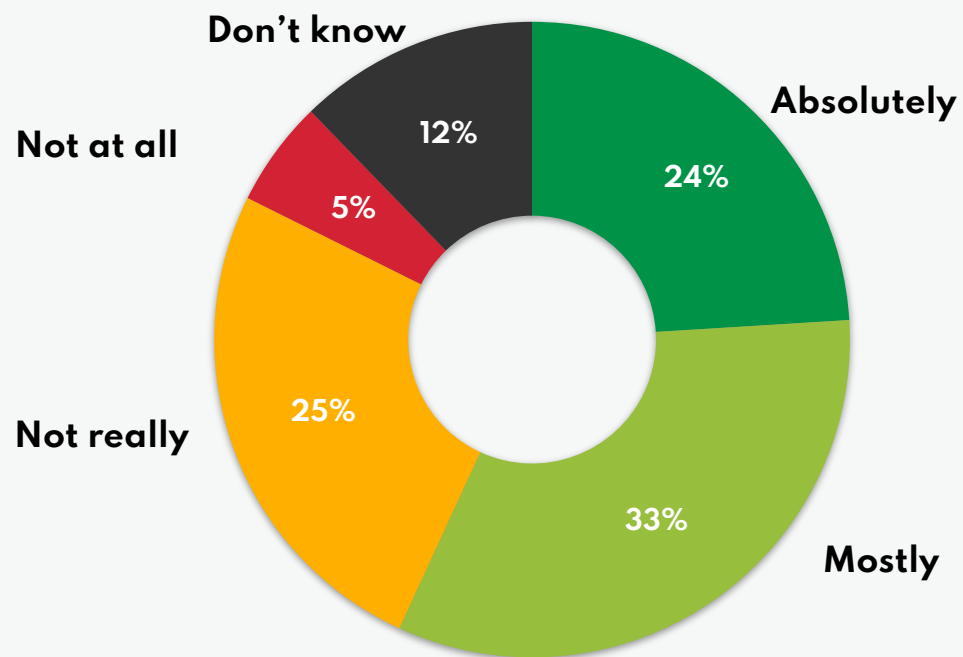
Question: In your eyes, is it likely that the Oui Pub campaign will be rolled out nationally within 3 years (by the end of the current trial period)?





## 57% of French retailers say they are ready for the "Oui Pub" initiative to be rolled out nationally

Question: If the "Oui Pub" system was rolled out tomorrow nationwide, would you say that your retail company is ready?

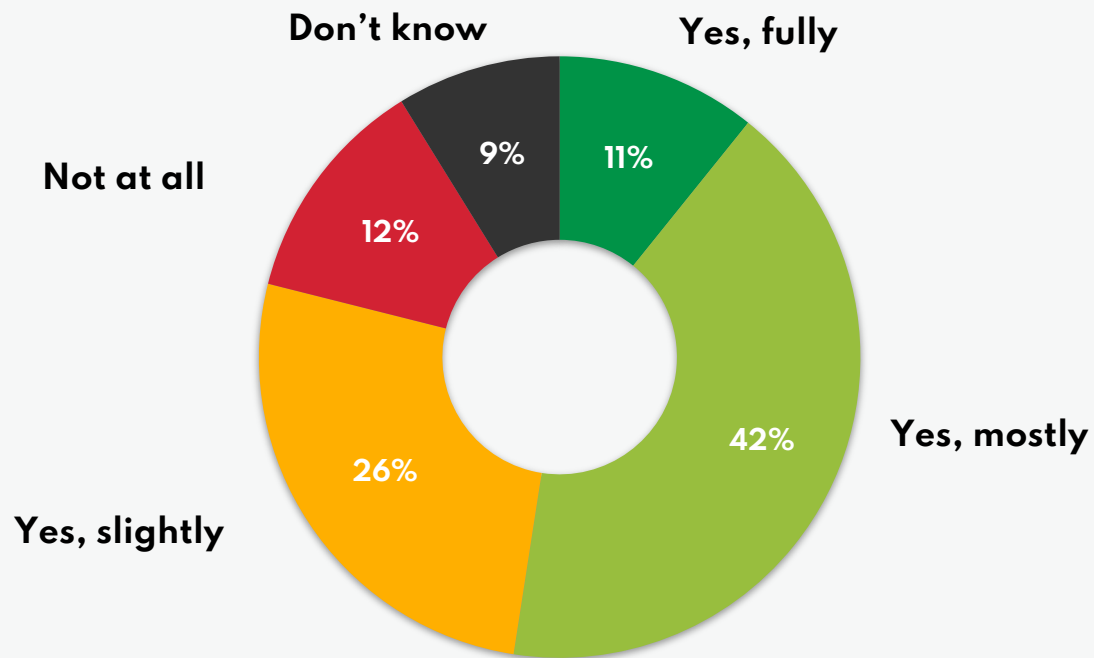


All (204 respondents) - Only one answer possible



# 79% of retailers are relying on digital to compensate for the erosion of traditional direct mail advertising

Question: Would you say that digital technology will be able to compensate for the erosion of direct mail advertising (increase in the Stop Pub rate, Oui Pub campaign, etc.)?



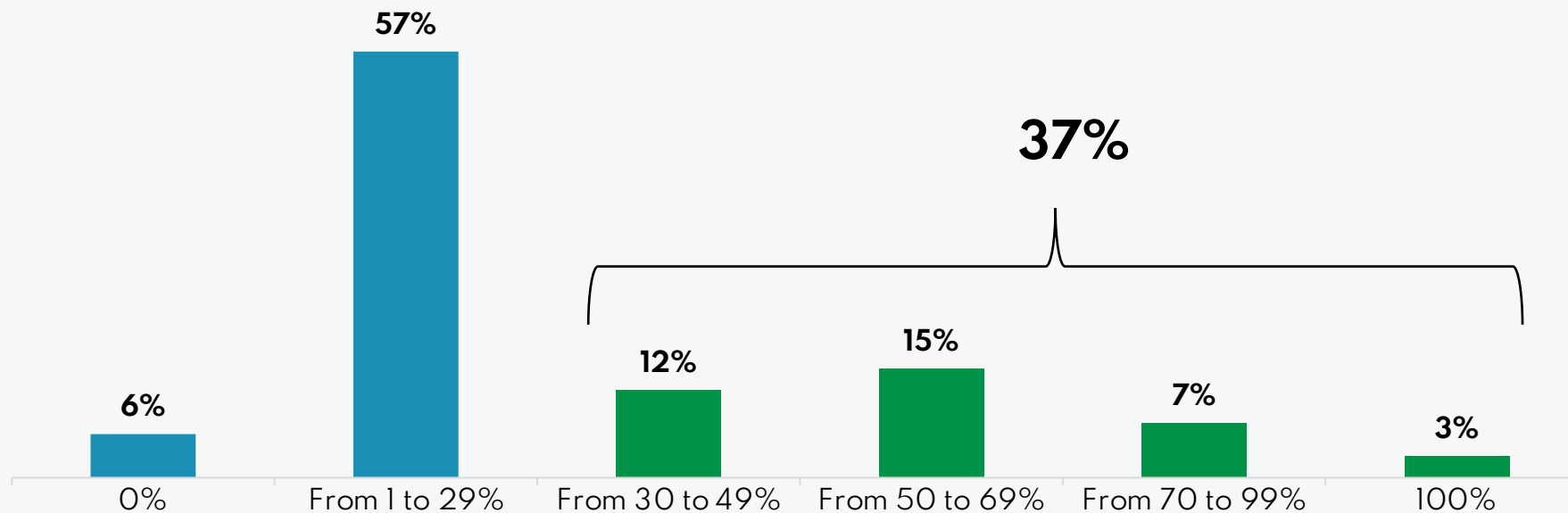
All (204 respondents) - Only one answer possible

Infopro survey for Bonial and LSA, January 2022



# 37% of French retailers allocate over 30% of their media budget to digital advertising

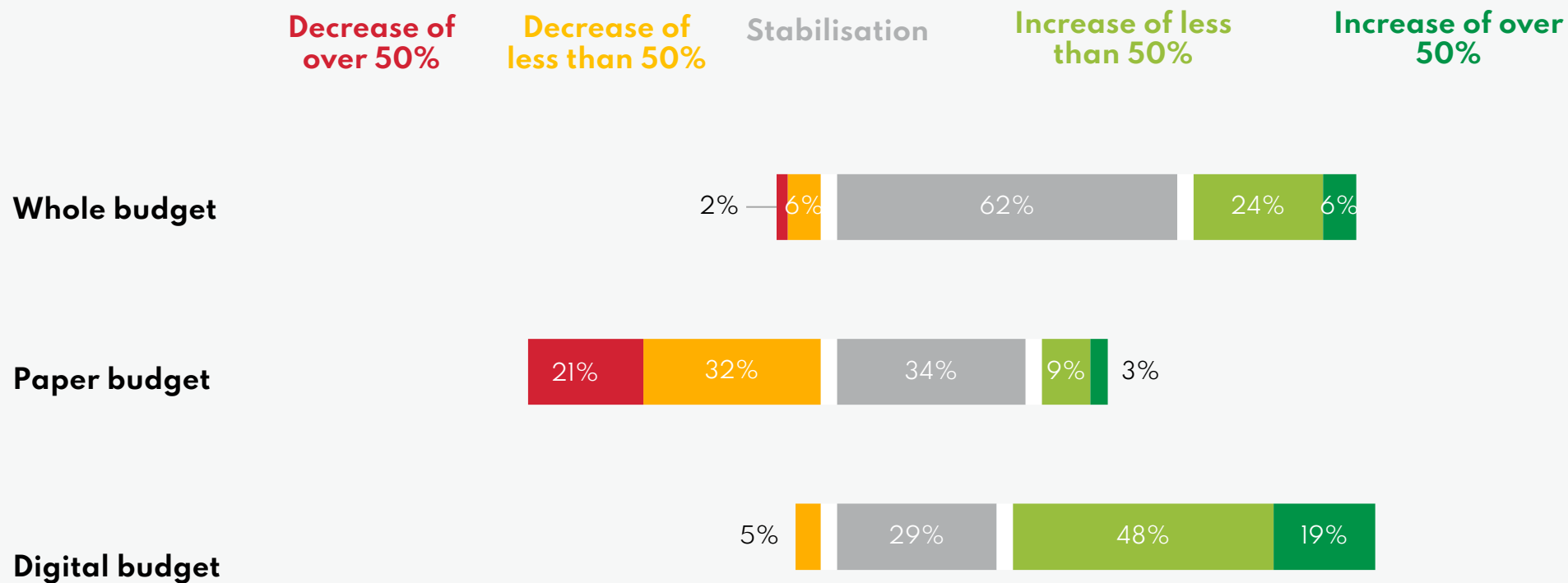
Question: What percentage of the media budget for advertising flyers and catalogues is allocated to digital advertising at your retail company?



All (204 respondents) - One answer per line

# French Retailers are rebalancing their media mix in favour of Digital advertising

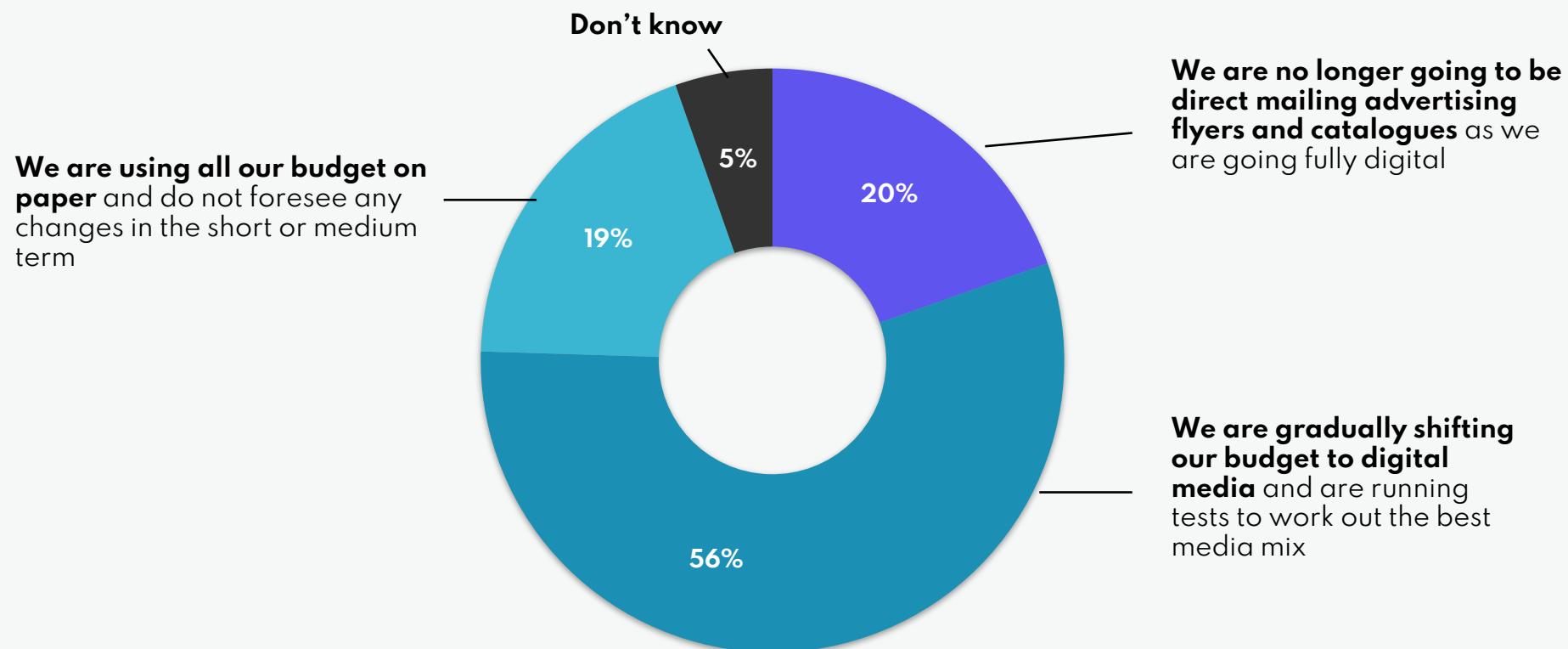
Question: How will your investment in communications through advertising flyers and catalogues change over the next twelve months?



All (204 respondents) - One answer per line

# French Retailers favour an iterative approach to optimising their media mix

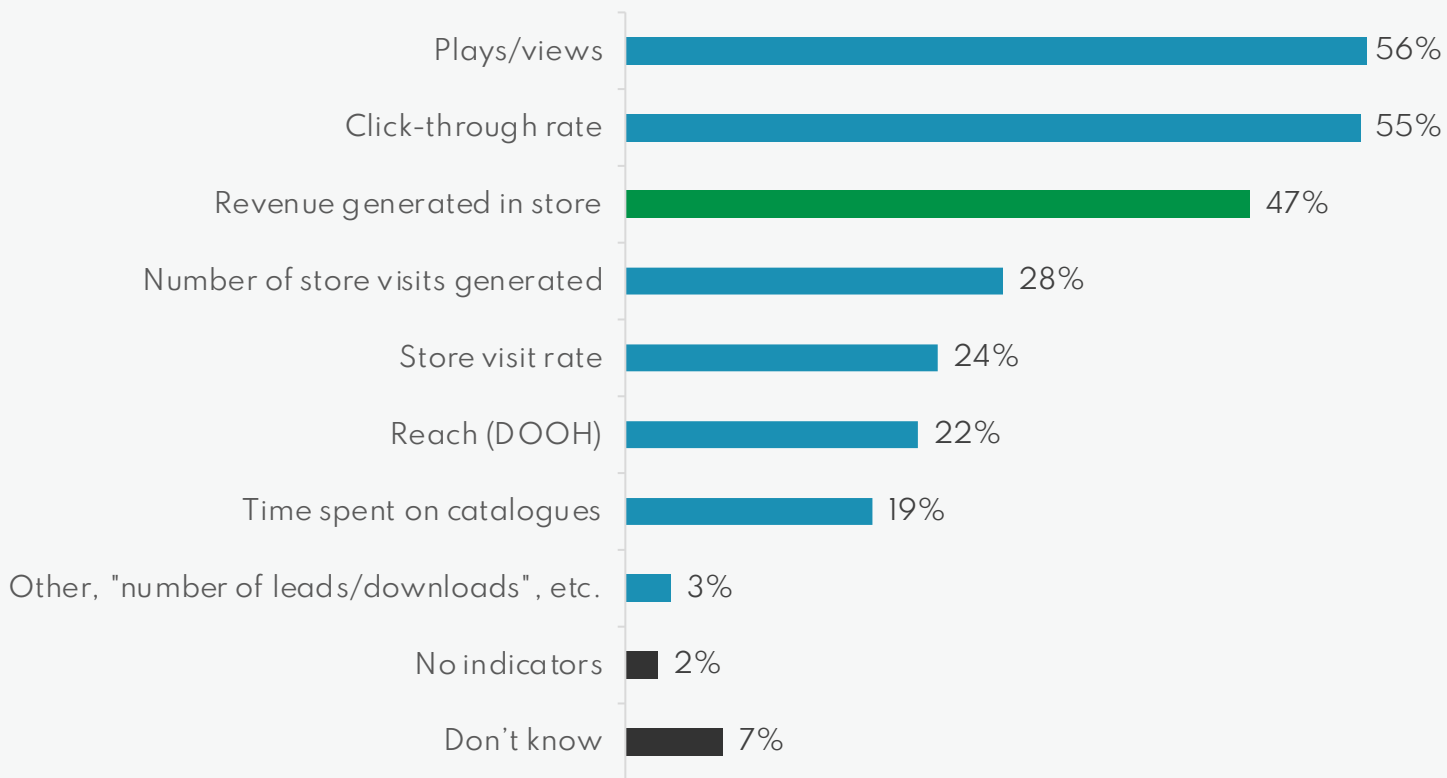
Question: Out of the following, which is the closest to the approach adopted by your retail company when it comes to digitalising advertising flyers and catalogues?



All (204 respondents) - One answer per line

# Nearly half of retailers assess the performance of digital media on store turnover

Question: What are the indicators followed by your retail company to assess the effectiveness of its digital advertising flyers and catalogues?



All (204 respondents) - One answer per line



## Key findings

- 71% of retailers communicate throughout the year via advertising catalogues
- 97% of retailers distribute their catalogues digitally, 71% in paper format
- The digitalisation of catalogues is a priority issue for 3 out of 4 retailers
- 56% of retailers want to gradually switch their budgets to digital media
- 64% hope to reduce printing costs by digitalising catalogues
- 59% of those who go digital let their customers know about it
- 36% of respondents think the "Oui Pub" campaign is very likely to be rolled out everywhere in 3 years
- 24% of respondents consider themselves completely ready if the "Oui Pub" campaign were to be rolled out everywhere tomorrow
- 57% of retailers say they are ready for "Oui Pub" to be rolled out nationally
- 79% of retailers believe digital media will compensate for the erosion of direct mail advertising
- 37% of retailers allocate over 30% of their media budget to digital media
- Nearly half of retailers assess the performance of digital media on store turnover

