

news

THE ASSOCIATION FOR SUPPLIERS OF PRINTING, PUBLISHING AND CONVERTING TECHNOLOGIES

GAERF Awards Student Scholarships to Compete in SkillsUSA Championships

MEDALISTS ANNOUNCED

The NPES-managed Graphic Arts Education and Research Foundation (GAERF) awarded nearly \$30,000 in scholarships to the nation's top advertising design, graphic communications, and screen printing technology students who participated in the SkillsUSA Championships held June 22-24, 2011, in Kansas City, MO. Each competitor was given \$250 to defray the costs incurred in traveling to the event.

"GAERF is committed to supporting programs that pre-

pare our workforce of the future," said Ralph J. Nappi, GAERF President. "In this spirit, we are delighted to recognize our industry's most talented students and encourage them to consider the many exciting career opportunities the graphic communications industry has to offer."

The annual event which, this year, hosted more than 5,700 contestants competing in 94 different skill and leadership contests, showcases the top career and technical education students in the nation. Its purpose is to reward students for excellence, directly involve industry in evaluating student performance, and provide training relevant to employers' needs. To that end, the exhibition—which occupies a space equivalent to 16 football fields—is held with the assistance and support of industry, trade associations and labor organizations.

To become eligible for the national competition, students must first compete at the local and state levels. Two representatives from each state—one at the high school level and one at the



The 39 Graphic Communications competitors flanked by representatives of Heidelberg, an official sponsor of the event, in Bartle Hall, Kansas City, MO.

post-secondary level—then advance to the national competition.

In recognition of its continued financial support for the past five

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PRIMIR Summer Meeting



Nearly 50 marketing and other industry executives participated in the August 1-2, 2011, PRIMIR Summer Meeting held at RR Donnelley headquarters in Chicago.

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president's perspective

Postman, We'll Miss You If You Go



Ralph Nappi
NPES President

In June, NPES members attending our Capitol Hill Fly-in had a unique opportunity to meet with Postmaster General Pat Donahoe. Pat is a long time USPS employee

who came up through the ranks and was recently named Postmaster General. We quickly discovered at our meeting that he had a detailed grasp of USPS challenges.

Going into our visit I expected the typical 15-minute "meet and greet" quick exchange of issues and a polite hand towards the door. We received just the opposite! The 'polite hand to the door' led us to Pat's conference room where he spent 40 minutes sharing challenges and possible solutions, while pushing us for *our* opinions on what USPS should do in the future. Ironically, we were the ones who had to end the meeting, because we needed to attend prearranged congressional appointments. But we left his office with three distinct observations:

1. The USPS is in a lot more trouble than most people, including Congress, realize;
2. The possible solutions are not at all easy (*are they ever?*); and,
3. The USPS, at its highest level, is looking at the mailing industry, including supplier groups like NPES, as a partner and friend to move USPS forward.

While the issues are many, here are the key ones:

1. The USPS is looking at a \$9 billion shortfall for the 2011 fiscal year;
2. Labor accounts for nearly 80% of the post office's operating expenses;
3. First Class mail is the largest revenue source and it is now falling at over 7% annually; and,

4. The contentious overpayment of the USPS pension program is not likely to be 'given back' by the government to help balance the USPS budget.

So where does the USPS head from here? A few likely scenarios:

1. An additional 3,700 post office closures, approximately 11% of the current number;
2. A more aggressive transition to the "Village Post Office" concept, where postal services like selling stamps and handling small packages would be done in retail outlets like supermarkets and drugstores;
3. A potential decrease from 6 to 5 day delivery, with the elimination of Saturday mail; and,
4. A possible increase in the First Class postage rate starting in January 2012.

So why is this important to *you*? For many reasons! First, is the impact that changes to the USPS will have on our industry, since to this point roughly 50% of everything printed goes through the mail. So the future viability of the USPS is important to the entire printing industry. Second, is the need to emphasize to both community leaders and elected officials that the depth and breadth of the mailing industry—8 million private sector jobs in total—goes well beyond the current 570,000 plus postal employees. And finally, a 'call to arms' is needed to help many constituents recognize the need for a viable USPS.

As our industry's collective voice, NPES is meeting that "call to arms" by its active partici-

pation in the Coalition for a 21st Century Postal Service that is working at length with the new 112th Congress, the USPS, postal unions and other stakeholder groups to develop legislation that will provide solutions to the needs of all these constituencies, and strengthen a service that is still a vital part of the U.S. economy. But we need you, our members, to be engaged as well.

To facilitate that engagement, Deputy Postmaster General Ronald Stroman will be attending GRAPH EXPO 2011 and will be a keynote presenter at our EXECUTIVE OUTLOOK program on Saturday, September 10th. If you would like to see and hear him, and ask him questions, please contact me and I'll arrange for a complimentary pass for you to attend.

There are many things affecting our industry right now, and the future of the United States Postal Service is a huge one! Having you, our members, knowledgeable and impactful in this issue will have a direct effect on all our futures. ●

A promotional poster for the Vision 3 Summit. At the top left is a green triangle with the number '3' inside, above the text 'VISION summit'. Below this are logos for the ICA, NPES, and NAPL. To the right, the text reads 'Vision 3 Summit', 'February 19-22, 2012', and 'Marco Island Marriott • Marco Island, Florida'. Below that is the subtitle 'An Executive Leadership Conference for the Graphic Communications Industry'. The background features a large, stylized eye made of a mosaic of small squares. At the bottom, there is a photograph of a group of people in a conference setting. A green banner at the bottom right says 'SAVE THE DATE!' in white capital letters.

years, GAERF was recognized with a Donor Service Award at the Youth Development Foundation's Award and Recognition Luncheon on Thursday, June 23, 2011. ●

Congratulations SkillsUSA 2011 Medalists

GRAPHIC COMMUNICATIONS MEDALISTS

Secondary school level:

- Gold: Christina Hillman, Effingham County High School, Springfield, GA
- Silver: Zack Minor, Tri County Technology Center, Bartlesville, OK
- Bronze: Craig Sweet, Sammamish High School, Bellevue, WA

Post-secondary school level:

- Gold: Jonathan Hand, Appalachian State University, Boone, NC
- Silver: Amanda Breese, Riverside Community College, Riverside, CA
- Bronze: John Bohnett, Ferris State University, Big Rapids, MI

ADVERTISING AND DESIGN MEDALISTS

Secondary school level:

- Gold: McKinzie Madsen, Desert Hills High School, St. George, UT
- Silver: Emily Nelson, Arcadia High School, Phoenix, AZ
- Bronze: Danielle Thompson, Miami Valley CTC, Clayton, OH

Post-secondary school level:

- Gold: Tiffany Baker, Rolla Technical Institute, Rolla, MO
- Silver: Rheta Whittington, Guilford Tech Community College, Jamestown, NC
- Bronze: Isaiah Johnson, Des Moines Area Community College, Ankeny, IA

SCREEN PRINTING TECHNOLOGY MEDALISTS

Secondary school level:

- Gold: Travis Goad, Greenland High School, Greenland, AK
- Silver: Austin Chupp, Elkhart Area Career Center, Elkhart, IN
- Bronze: Domingo Ramirez, Austin High School, Austin, MN

Post-secondary school level:

- Gold: Danny Merritt, Forsyth Tech Community College, Winston-Salem, NC
- Silver: Ross Irwin, Sikeston Career & Technology Center, Sikeston, MO
- Bronze: Sara Newcomb, Arkansas Career Training Institute, Hot Springs, AR



In recognition of its five-year sponsorship of the SkillsUSA National Championships, GAERF Director Eileen Cassidy (c) accepts Donor Service Award on behalf of GAERF from Greg Rintala (l), Chairman, SkillsUSA Youth Development Foundation, and Tim Lawrence (r), Executive Director, SkillsUSA.

Discover a World of New Business Opportunities

LATIN AMERICA AWAITS AT GRAPH EXPO 2011

Introducing Today's Latin America Print Market

A year ago the World Bank forecast the region's economy would grow 4.5 percent. The main printing markets in the region are Brazil, Mexico, Argentina, Colombia, Chile and Peru. The region has approximately 50,000 printing companies with Brazil and Mexico representing 60% of total revenues. The main printing products are packaging, commercial and publishing.

In the past, Latin America was affected by debt defaults, currency devaluations and the need for bailouts from rich countries. Today, the envy of its northern counterparts, it is experiencing robust economic growth!



If you are among the NPES members who understand that NOW is the time to explore new business opportunities beyond the U.S. market, don't miss this FREE informational seminar and networking event at GRAPH EXPO 2011 on **Tuesday, September 13, "Success Formulas for Doing Business in Latin America."** This program will be the most efficient and effective way for you to explore the fast growing markets in Latin America as you:

- Network with prospective customers and partners,
- Listen to experienced business development experts, and
- Hear from already established printers.

While at GRAPH EXPO, be sure to visit the **International Business Center (IBC)** in McCormick Place, Room S102cd, open during show hours.

The IBC is a unique information and networking forum that brings together international buyers, U.S. exhibitors and NPES members.

The IBC's complimentary services include:

- Matchmaking service to connect international visitors and U.S. exhibitors,
- FREE export business assistance consulting with U.S. Commercial Services Specialists from the U.S. Department of Commerce,
- FREE customized market development consulting meetings with NPES Market Representatives from China and Brazil,
- Private meeting rooms,
- FREE Internet,
- Lounge area, and
- Translator assistance.

For more information about NPES' International Programs and Services, please contact Pernilla Jonsson, Assistant Director of International Trade at e-mail: pjonsson@npes.org or phone: 703/ 264-7200. ●





rethink print

Times are tough, so how are NPES members, *like you*, adapting to the realities of today's economy and impact of the latest industry trends?

This year's conference, themed "Rethink Print," not only recognizes the challenges—but addresses them head on with a solid, on-point program that will deliver all of the economic updates, current trends information, and industry expert insights you need to position your company for success now—and in the years ahead. And here, the networking is key since there's not a better time or place to meet and compare notes with peers who are going through the same challenges as you.

Registration is open now. Do it today and you will return home armed with all of the information, insights and actionable strategies and tactics to best position your business for success in the months and years ahead.

NPES 2011 ANNUAL CONFERENCE OCTOBER 17-19, 2011

Previewing the powerhouse line-up of presentations is our featured panel discussion on a groundbreaking 'new breed' of "Pioneering New Partnerships" with **Mal Baboyian**, President, Production Printing Systems, Oce North America; and, **Mark Hiscar**, President & CEO, KBA North America, *plus...*

• **Alan Beaulieu**, President and Chief Executive Officer, Institute for Trend Research—back by member request (and always eerily on-target)—on "The Economic Outlook"

• **Rob Stevenson**, author of "52 Essential Habits for Success" with his 'new age' advice on mastering "Leadership for Break-out Success"

• **Dr. David DeLong**, President, David DeLong & Associates with his well-timed method for "Confronting the Threats and Opportunities of a Changing Workforce: A Framework for Action"

• **Tom Saggiomo**, President and CEO, the DG3 Group—and longtime friend to our industry—with his 'both sides of the fence' perspective on "The Evolving Print Market," plus special guest...

• **Steve Ford**, Actor, Son of President Gerald Ford and First Lady Betty Ford, with insight he could only have gained from, "Inside the White House and Hollywood: Getting to the Top with Character."

From a value standpoint, in addition to the provocative program, the hotel room rates for *this* year are the lowest they have been for an Annual Conference in over 12 years! Plus, the location is ideal for travelers from everywhere—easy in, and easy out.



Alan Beaulieu



Rob Stevenson



Steve Ford

The NPES/PRIMIR EXCHANGE Means Business!

The NPES/PRIMIR EXCHANGE is more than just your *exclusive*, on-site oasis off the bustling GRAPH EXPO show floor. Just steps away, it's the *single* best place where NPES and PRIMIR members come to:

- Conduct business with key customers and prospects in semi-private meeting rooms
- Regroup with staff members to strategize the day's agenda
- Grab a quick morning cup of coffee or a short afternoon refreshment break, and
- Utilize the convenient PC Corner with Internet and printing capabilities.



LOCATION:

MCCORMICK PLACE SOUTH
Room S102a

HOURS OF OPERATION:

Sunday, Sept. 11 - Tuesday, Sept. 13
9am - 5pm

Wednesday, Sept. 14
9am - 4pm

FOR COMPLETE PROGRAM DETAILS AND
TO REGISTER VISIT: WWW.NPES.ORG



NPES Trade Mission: China and All in Print China Tradeshow

YOUR PASSPORT TO THE ASIAN MARKET

Let NPES be your guide to new business opportunities in the Asian marketplace during the NPES Trade Mission to China. Now is the ideal time to investigate first-hand how to expand your business into the global marketplace through one of the largest international exhibitions in Asia.

An NPES Trade Mission is...

A customized VIP business development program for NPES member companies and corporations seeking to:

- Expand into the International market
- Create brand(s) awareness

- Reach new customers, and
- Increase sales.

Utilizing NPES' comprehensive, extensive network of trade representatives and international offices strategically located in the fastest growing markets you will gain 'VIP access' to pre-qualified customers who are eager to learn more about U.S. products and know-how.

The NPES Booth at All in Print China is...

A high profile and cost-effective way to reach new customers at All in Print China 2011. Here you will display your company literature and, as part of the NPES Trade Mission, participate in a VIP tour to visit with local printers. ●

NPES Trade Mission All in Print China

November 14-17, 2011
Shanghai, China

For complete details about the NPES Trade Mission to China, or discounted exhibit booth space at All in Print China 2011

Contact Pernilla Jonsson
E-mail: pjonsson@npes.org
Phone: 703/264-7200

Market Intelligence News: UCC Filing Update

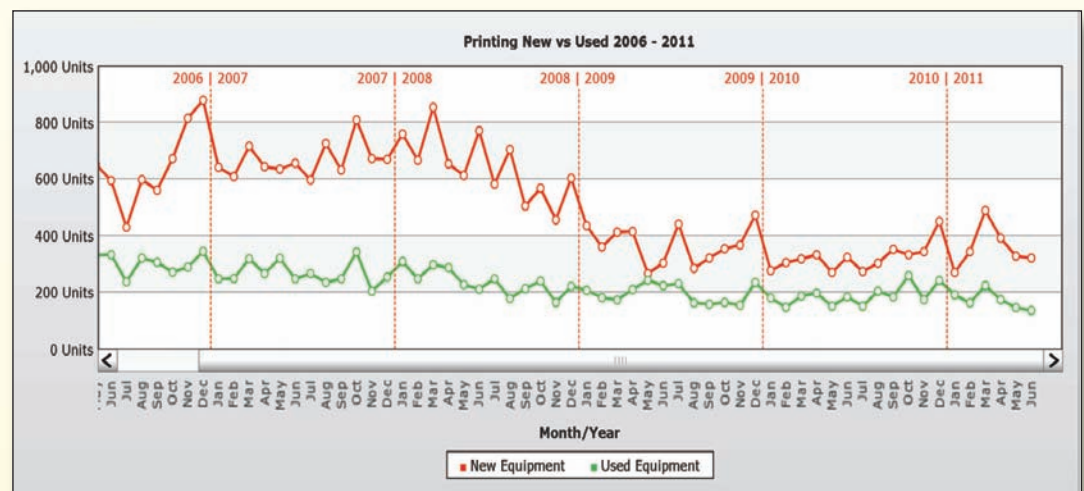
The chart compiled from UCC data provided herein by Equipment Data Associates (EDA), shows up-to-date UCC (see definition below chart) activity for all printing equipment. Although UCC filings are a combination of new equipment sales, used equipment sales and refinancings of existing placements, they are still a strong indicator of market activity. Although new equipment filings for June were essentially flat when compared to 2010 data, the first half of 2011 totaled 2151 units which is still up 17.3% from the first half 2010. June used equipment filings were down 40% from 2010 levels but despite that, used filings for the first six months of 2011 are only down 1%. Both new and used filings continued the downward trend from the 2011 high point in March, however. This information is extracted directly from EDA's comprehensive database of nearly 30,000 records for purchasers of printing equipment.

For each of the data points in the table, subscribers to EDA's market intelligence services can see exactly who purchased the piece of equipment—and the manufacturer and model. NPES member companies that participate in the free NPES Market Data program are eligible for significant discounts on EDA's services. By combining the critical

purchaser information from EDA with the comprehensive market statistics, analysis, and forecasts provided by NPES' free Market Data program, participating NPES member companies can get a complete picture of the current and anticipated future activity in the marketplace.

For more information, or to join the free NPES Market Data program, contact NPES Assistant Director for Market Data, Rekha Ratnam at phone: 703/264-7200 or e-mail rattanam@npes.org. For specific information about the market intelligence services offered by EDA, contact Mauricio Jurin at phone: 704/845-1099 or e-mail: mjurin@edadata.com. ●

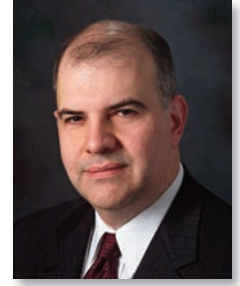
Printing Equipment UCC Filings: 2006–2011



A Uniform Commercial Code Form 1 (UCC-1) filing is a financing statement required by law to be filed with the state to show that one party (usually a lender) has a security interest in another party's (usually a borrower's) personal property, and most frequently relates to the commercial financing of capital equipment through a lending institution. UCC data is filed everyday throughout the U.S. Each UCC data filing statement has three components: the borrower, the lender, and what the borrower purchased, including make, model and serial number. Once the data is filed, EDA's more than 50 employees manually review each filing to identify and correctly classify the transactions of printing equipment. What results is a robust database that offers subscribers continually updated information on exactly who is buying or leasing what pieces of equipment.

NPES Lease Data Offers Insights into Capital Equipment Investment Patterns

by Dr. Joe Webb, Director, WhatTheyThink Economics & Research Center



Dr. Joe Webb

Every month, NPES reports a data series of the number of leases for new and used equipment to its members. The data offer an important glimpse into the investment patterns of print business executives, and also has a very strong statistical relationship, as would be expected, with U.S. commercial printing shipments.

“This is why this lease data series is so meaningful.”

NPES collects the leasing data through an exclusive contract with Equipment Data Associates (EDA) and publishes the data for its members. Not all printing equipment are leased, however, as many printing organizations either self-finance equipment, or fund their overall capital investment with broader banking relationships. There is enough volume of leases, however, especially among small and mid-size print businesses, that these data can be used to provide a perspective of the industry's investment condition and patterns.

The data are also the number of leases, and not their dollar value. That is, a tabletop folder counts as one lease just like a six-color press does. No data series is perfect, of course, and this is something that needs to be understood about these data. Since there are hundreds of leases per month, this issue tends to be less problematic over time. Many of these statistical issues are minimized by creating

a 12-month moving total, so that the lease data are always on an annual basis. Every time a new month is added, the oldest month is dropped. This smooths the data variations and seems to increase the statistical value of these data.

While there may be a downside to these data being the number of leases, there is a significant upside to that aspect. Dollar denominated data are subject to the distortions caused by inflation, but the number of leases is not. Comparing dollar sales from month to month does not usually pose a problem, but when comparing dollar-based data over a period of years, the

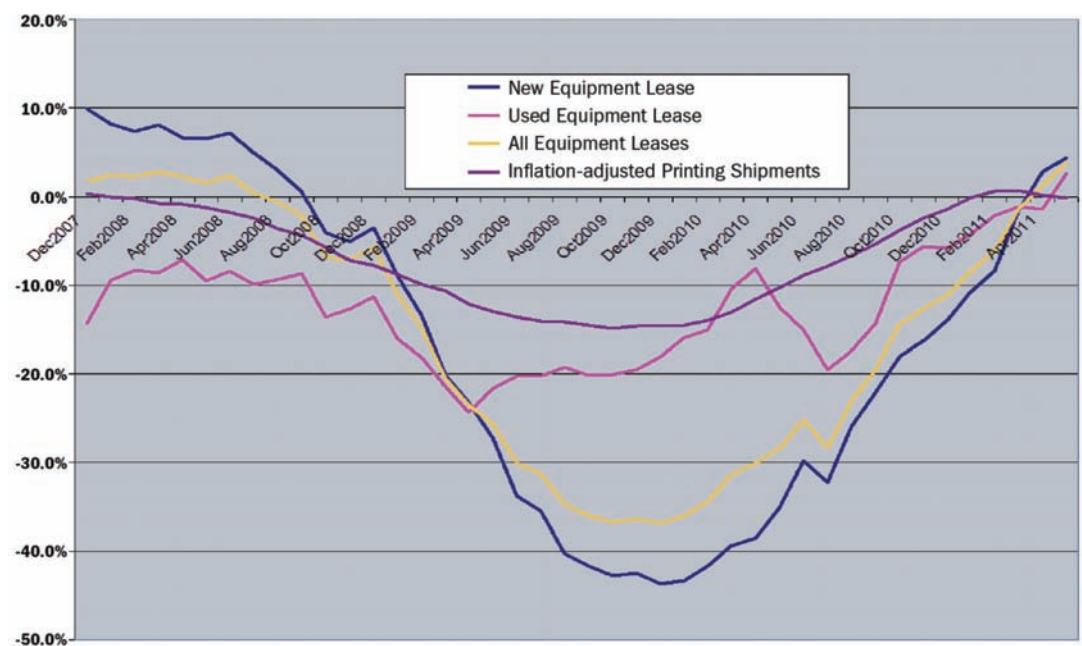
ing that upturn. This is why this lease data series is so meaningful.

This means that some care must be taken when comparing these data to other data series. For example, it is interesting to compare leasing trends with printing shipments. Printing industry shipments are in dollars, so those shipments data need to be adjusted for inflation to make that comparison relevant. There are many alternatives for inflation adjustment, but there is no perfect one. Our preference has always been the Consumer Price Index (CPI) as published by the Bureau of Labor Statistics. The creation of a 12-month moving total of the inflation-adjusted printing shipments data is also worthwhile, so we adjust each month's data for the CPI, and

series. That is, January 2007 is compared to January 2006, February 2007 is compared to February 2006, etc. The purple line, the one that does not dip as low as the others, is the inflation-adjusted printing shipments. Keep in mind that the recessionary period started in December 2007, and bottomed out in June 2009, and then the economy started to recover. All of the data series show that kind of U-shaped pattern to one degree or another.

The dark blue line is the change in new equipment leases. When business is better, new equipment has better sales. When business is bad, new

Figure 1



effects of inflation creep into the analysis. This means that rises in dollar sales volume might be attributed to stronger sales activity when it is actually inflation caus-

then create our moving totals.

The chart above (Figure 1) shows several data series. The basis of the chart is the year-to-year percentage change of each

equipment dips quite severely. Part of that dip is the greater availability of used equipment.

There has always been some speculation about the drivers of

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used equipment sales trends. From our analysis, it is usually a function of the availability of such equipment. The relative stability of used equipment leases in the chart compared to the more dramatic shifts of new equipment leases should not be a surprise. Economic downturns cause print businesses to close, and many weak shops default on their leases. This means that the amount of used equipment on the market rises. In good times, printers always check the used equipment markets, often seeking to match models of equipment they already have in their shops. This means that new and used equipment compete with the same dollars at those times, and if the used market is dry, the new equipment gets the preference.

In general, the U.S. market for used equipment is quite different than it was a couple of decades ago. At that time, used equipment would be shipped to developing areas of the world, such as Latin America and Asia. Today, those markets are now known for their strong economic growth and rising incomes, and are buying more new equipment. This, in turn, has ensured that there would be more used equipment stranded in North American than would have been typical many years ago.

Since the general decade-long decline in print volumes, and the commensurate decline in the number of print establish-

printing shipments have stabilized. The year-to-year comparisons are positive. How long this will last remains to be seen, of course, since printing shipments are still being aggressively challenged by digital media.

This leads to another question: can changes in printing shipments be used to forecast these leasing data? In some previous work we experimented with this idea, and even tested the concept of using printing profits to forecast investments. The profits relationship was not statistically strong enough to use, but the sales trends were.

We found the best statistical relationship with a 3-month lead for the 12-month moving totals of inflation-adjusted printing shipments and new, used, and total leases. In this case, having a 3-month lead would mean that knowing March printing shipments data might give you an indication about what June's lease data would be. The r-squared value, which statisticians use to measure the strength of the statistical relationship of shipments compared to new equipment leases was 98% with a three-month lead, which is superb. Without the lead, that is, comparing March leases with March shipments was about 75%, which is also good, but obviously not as good. The table below

Figure 2

r-squared results	New	Used	Total
Monthly data with no lead	75%	57%	79%
12-month moving total with no lead	95%	94%	98%
Monthly data with 3-month lead	70%	45%	70%
12-month moving total with 3-month lead	98%	91%	99%

ments, remaining printers have realized that looking for used equipment was often worthwhile, and also that the difficult financial circumstances of many printers has caused much of the used equipment to be "younger" and more current than it was historically. In 2008, the percentage of leases that was used hovered around 27%; in 2011, it has been about 35%.

Finally, the chart shows an upturn in the number of leases of printing equipment as

(Figure 2) summarizes the values:

What is very obvious from the chart is that using 12-month moving totals to make each month an annualized figure markedly raises the r-squared values. The improvement is particularly noticeable in the data for used equipment.

In summary, the NPES equipment lease data are a very important data series to monitor the overall health of the capital investment in our industry. ●

Continued from page 1

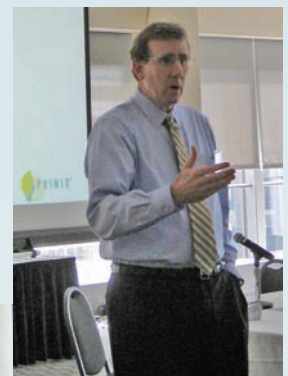
PRIMIR Summer Meeting

A record number of attendees participated in the recent PRIMIR Summer Meeting held August 1-2, 2011, at RR Donnelley headquarters in Chicago. Attendees learned the findings of two soon-to-be-published PRIMIR studies: **"Evolution of General Commercial Printing: Implications for the Future"** and **"Printing Industry Consumables Usage and Trends."** They also heard from RR Donnelley Executive Vice President, Doug Fitzgerald, about **"Keeping Print Relevant in a Digital Age"** and Wayne Peterson, Principal, Black Canyon Consulting Group, about adding creativity as an element of the business planning process. Attendees also participated in the development of six new PRIMIR studies. ●



Jack Miller, Market-Intell, shared findings from the recently completed PRIMIR study "Evolution of General Commercial Printing: Implications for the Future."

Doug Fitzgerald, Senior Vice President, RR Donnelley, explains to PRIMIR attendees about "Keeping Print Relevant in a Digital World."



Wayne Peterson, principal, Black Canyon Consulting Group, advises PRIMIR audience to incorporate and utilize creativity as a business discipline to create new value in their organizations.

NPES CALENDAR

September 2011

EXECUTIVE OUTLOOK Conference

September 10 • Chicago, Illinois

GRAPH EXPO

September 11-14 • Chicago, Illinois

TC130 Working Groups and Plenary

September 16-22 • Berlin, Germany

International Graphic Arts Show

NPES Member Booth and Trade Mission

September 16-21 • Tokyo, Japan

October 2011

NPES 2011 Annual Conference

October 17-19 • Palm Beach, Florida

November 2011

ICC Meeting

November 13-15 • San Jose, California

All in Print China

NPES Member Booth and Trade Mission

November 14-17 • Shanghai, China

CGATS/USTAG

November 17-18 • Long Beach, California

December 2011

PRIMIR Winter Meeting

December 5-7 • Charleston, SC

January 2012

ICC Meeting

January 30-February 1 • Munich, Germany

February 2012

Vision 3 Summit

February 19-22 • Marco Island, Florida

May 2012

drupa 2012

NPES Member Booth

May 3-16 • Düsseldorf, Germany

June 2012

ICC Meeting

June 11-13 • Tokyo, Japan

ICC Symposium

June 15 • Shanghai, China

October 2012

GRAPH EXPO

October 7-10 • Chicago, Illinois

November 2012

NPES 2012 Annual Conference

November 10-12 • Indian Wells, California

March 2013

PRINT

September 6-11 • Chicago, Illinois

Direct Mail and the Gorilla in the Room

WHAT MARKETERS CAN LEARN FROM TWO BASKETBALL TEAMS AND A WOMAN IN AN APE SUIT

Imagine watching a half-minute video in which two teams pass a basketball. One team wears black shirts, the other wears white. Your task is to count how many times the team members in white complete a pass. If you are like most people, chances are you will report the correct number of passes. But there is about an even chance that you will completely miss the woman in the gorilla suit ... even though she walks through the game in plain sight, including pausing to face the camera for a bit of chest beating before striding off.

By means of the gorilla challenge and other ingenious tests, a pair of cognitive psychologists demonstrated years ago that, try as they may, people simply cannot focus on more than one thing at a time. And though the psychologists never marched a gorilla past a mailbox—at least, as far as we know—we cannot help but see a possible connection between their research and this tidbit from a recent survey: about 79 percent of households read or at least skim their advertising mail, whereas only about 19 percent of commercial e-mails are even opened.

The same survey reports that it is e-mail from unknowns, or with too-long or irrelevant subject lines, that tends not to win attention. Seen in light of the gorilla test, this is hardly surprising. When people check their e-mail, they rivet their atten-

tion on the “From” field for names they know, and on the “Subject” field for short, relevant items. When minds are engaged in that manner, e-mails from strangers, or with irrelevant or too-long subject lines, may as well be invisible gorillas, chest-beating and all. Assuming, that is, that they evade spam filters in the first place.

By contrast, as people retrieve and sort through their mail, they must focus on each piece, one at a time, in order to settle on which ones they will explore further. In its moment, each piece—including advertising mail—commands full attention. And not just so people can avoid inadvertently discarding letters, bank statements or bills, either. Three out of four Americans say they like, trust and read advertising mail. In fact, for new product announcements, the open rate for direct mail is about 1.7 times that of commercial e-mail. That includes Generations X and Y, even though they grew up with the Internet.

Moreover, a visit to the mailbox is a daily, anticipated event. Most people look forward to it. And, conveniently for advertisers, it's an event that takes place away from the competing clamor of TVs, computers, stereos and video games.

Of course, there's no need to don a gorilla suit and saunter by a mailbox to prove that direct mail packs



a punch. Direct mail's consistent ability to deliver a robust ROI, along with survey data, do that on their own. So if you're looking for a solid way to keep the market's eye on the ball in an online world, count on direct mail.

It's the antithesis of the invisible gorilla. ●

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