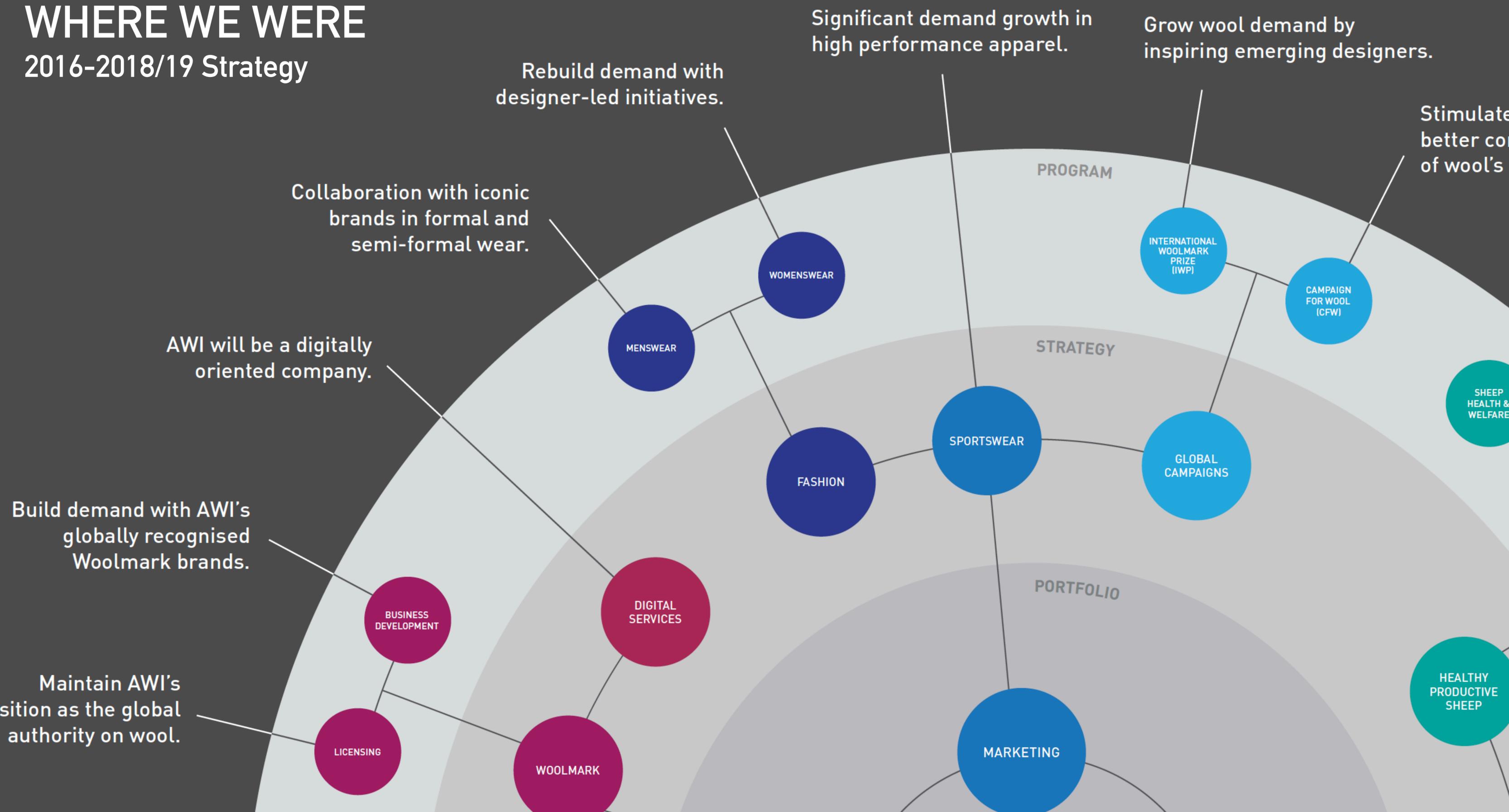


**2019-2021/22 STRATEGY:**  
Marketing Communications

# WHERE WE WERE

## 2016-2018/19 Strategy



# PORTFOLIO

3



Marketing

Trade

Business & Talent Development

Consumer

Sheep Production Innovation & Advocacy

Healthy Productive Sheep

Consultation

Traceability

Processing Innovation, Education & Extension

Woolmark Licensing

Education & Extension

Processing & Product Innovation

## WHERE WE ARE GOING 2019 - 2021/22 Strategy

Wool Lab

Events Presence

Fibre Advocacy

Meaning of the Woolmark

International Woolmark Prize

Woolmark

Eco Credentials

Benefits

Sports

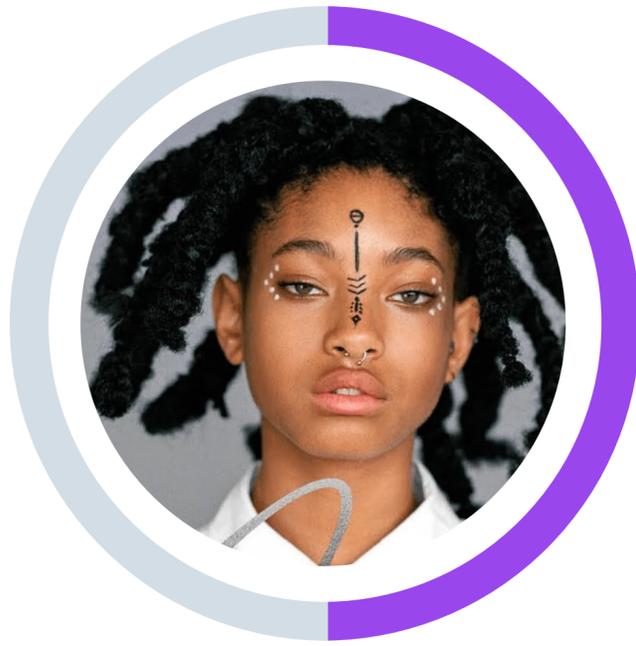
Fashion

Brand Partnership

Interiors

Interiors

# CONSUMER AUDIENCE SEGMENTS



## GEN Z

Anxiety has become prevalent among today's youth, leading to the rise of Generation Sensible, a group of teenagers that are more risk-averse than expected.

For this generation, excess is not as cool as it used to be. Brands must offer products that promote mental and physical health rather

 than detracting from it.



## MILLENNIAL

Clear-eyed and pragmatic about budget limitations, more cognisant than ever of product attributes, and unwilling to compromise on them. Parents who deem educational fees, property and experiences higher on the agenda

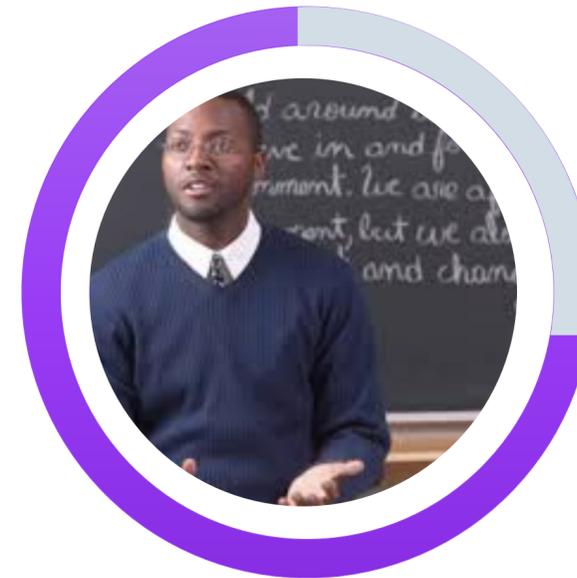


## SILVER SPENDERS

By 2035, there will be 78m people aged over 65, compared with 76.4m under the age of 18. Insurers Fidelity estimate that healthcare fees during retirement would cost a US couple now aged 65 an average of \$280,000. In the UK, two-fifths of the National Health Service budget is spent on aged care. In China, it is estimated that long-term care costs for the elderly will have doubled by 2030.

Keeping older people fit and healthy for as long as possible will be a long-term aim for individuals and the state.

# TRADE AUDIENCE SEGMENTS



## APPAREL SUPPLY CHAIN

Pressure to deliver quality, responsible products, We must deliver a turn-key solution for natural and sustainable offering through our fibre, story and quality assurance program.

## DESIGNERS / BRANDS / RETAILERS

Universities, High Schools and apparel business training departments are constantly searching for new educational resources that will add value to their offering, Woolmark accreditation will be used to promote the Learning Centre.

## EDUCATORS

The media landscape has changed dramatically. People are consuming more media but in less traditional formats. In order to stand out, we must focus on branded content features, paid trade media plan, ambassadors and media delegations to drive a significant share of voice for Merino wool.

## MEDIA



**THE STRATEGIC FRAMEWORK:**  
(the bigger narrative)



Marketing goals:

**DRIVE GROWTH**

**DEFEND THE CORE**

**BUILD REPUTATION**

Outcome:

*INCREASE THE DEMAND & PERCEIVED VALUE OF WOOL*

Product focus:

**SPORTSWEAR**

**MENSWEAR**

**WOMENSWEAR**

**CONSUMER**

**TRADE**

Audience:

Primary:

**MILLENNIALS**

Secondary:

**GEN Z**

**SILVER SPENDERS**

Primary:

**MILLENNIALS**

**BRAND**

Secondary:

**SILVER SPENDERS**

**GEN Z**

Primary:

**MILLENNIALS**

**BRAND**

Secondary:

**SILVER SPENDERS**

**GEN Z**

Primary:

**MILLENNIALS**

Secondary:

**GEN Z**

**SILVER SPENDERS**

Primary:

**MEDIA**

**DESIGNERS**

Secondary:

**EDUCATIONAL INST.**

**PROCESSORS**

Global Consumer Trends:

**Mindful consumption**  
**Nature's Way**  
**Health is Wealth**

**Nature's Way**  
**Inclusive Diversity**  
**Material Futures**

**Radical Openness**  
**Material Futures**  
**Nature's Way**

Strategic imperatives:

**#1 Educate on the benefits of wool (e.g. breathability)**  
**#2 Fibre advocacy (technical and environmental)**

**#1 Champion the eco-credentials of wool**  
**#2 Fibre advocacy (technical and environmental)**  
**#3 Communicate Merino as a luxury fibre**

**#1 Focus on innovation & young talent**  
**#2 Champion the eco-credentials of wool**  
**#3 Build trust about wool (e.g. fibre advocacy & traceability)**

Initiatives:

**Owned campaigns**  
**Benefits Comms**  
**Brand Partnerships**

**Brand Partnerships**  
**Meaning behind the mark**

**IWP / WPC**  
**Meaning Behind the Mark**  
**The Wool Lab**  
**Events**  
**Thought Leadership**

**LOCALISE**

## **THE STRATEGIC FRAMEWORK:**

Mapping it out in detail

# Mindful Consumption

## DRIVER

Sustainable living has taken on a new urgency. Anxiety about climate change and over-consumption is driving consumers to want for more out of their purchases.

## Trend

A more-than-me, and less-is-more mentality to purchase decisions. Brands are adopting a sustainability approach when it comes to core values & CSR initiatives, and more minimalist when it comes to design & product libraries.

## Wool's Opportunity

- Buy Less, Choose Well, Choose Wool
- The meaning of the Woolmark - Quality assurance, to keep and cherish
- Minimalist living - luxury Investment pieces / capsule wardrobes
- Resale Economy - Wool lasts longer, Woolmark authenticated



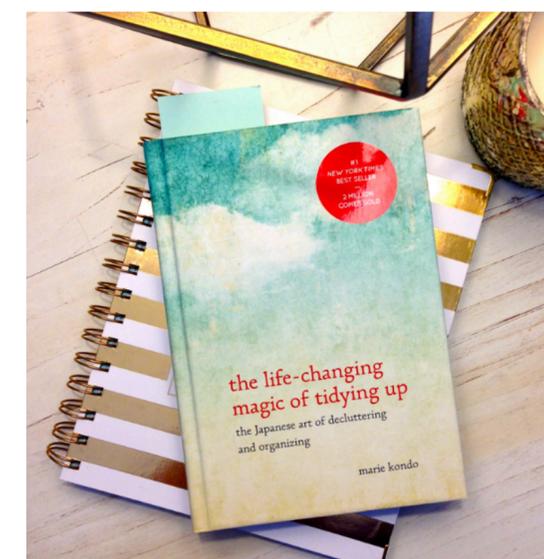
## Overconsumption is costing us the earth and human happiness

Story of Stuff creator Annie Leonard's new book examines the high price of the western world's obsession with all things material

- US cult of greed is now a global environmental threat, report warns
- Fred Pearce: Consumption dwarfs population as main environmental threat



DRIVERS: NEW URGENCY FOR SUSTAINABILITY



TREND: MINIMALIST LIFESTYLES



BRAND: PATAGONIA

# Radical Openness

## DRIVER

Consumer trust in brands and governing bodies is at an all time low. The immediacy of information and digital connectivity of humanity has created a demand for transparency.

## Trend

Authenticity has exploded. Brands are now being challenged to be honest, open and straightforward alongside the emergence of new technologies. The first step in creating consumer trust is shameless transparency. Increasingly, startups use this openness to win over consumers from established legacy brands too slow to adapt.

## Wool's Opportunity

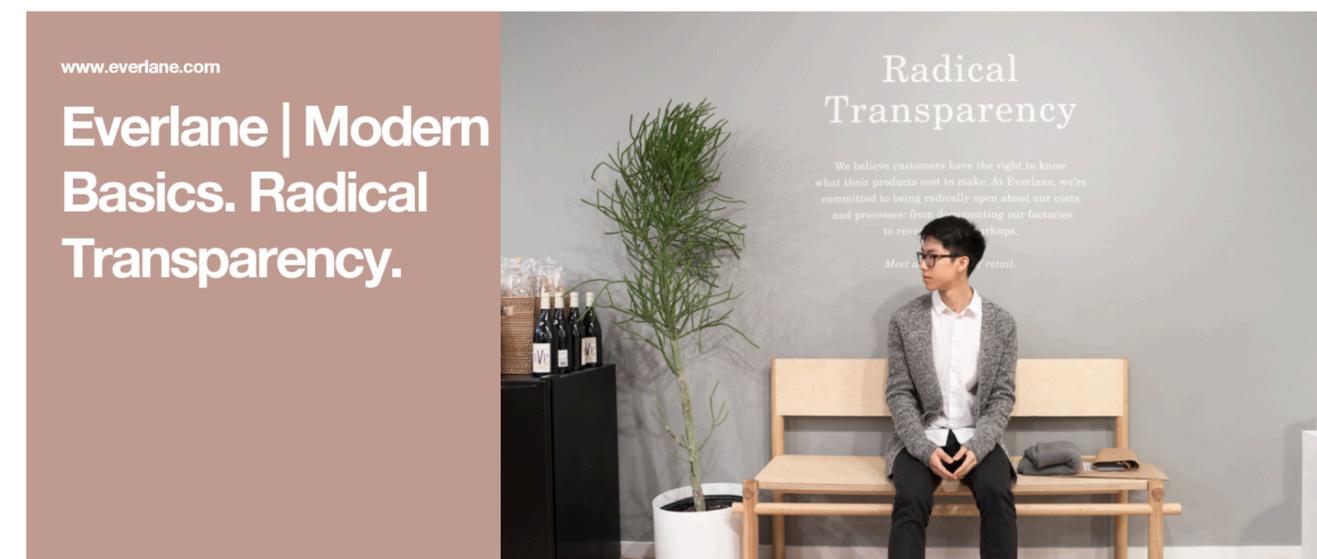
- [woolmark.com](http://woolmark.com) content strategy taking the world to Australia
- Media delegations: opening the gate to the world
- Traceability program, Interactive swing tickets



DRIVERS: DIGITAL AGE OF CITIZEN JOURNALISM AND FAKE NEWS



TREND: BRAND TRANSPARENCY CREATES CUT THROUGH



BRAND: EVERLANE RADICAL TRANSPARENCY

# Nature's Way

## DRIVER

The environmental impact and wastage of fast-fashion on natural resources has been illuminated in popular culture.

## Trend

High-end customers of luxury fashion are increasingly becoming more involved in sustainability issues and naturally-sourced materials. To satisfy this demand, luxury brands are looking to win over wallets with commitments to more ethical practices, and a commitment to sustainable processes.

## Wool's Opportunity

- Building social equity for wool
- Media delegations: opening the gate to the world
- Defining Wool's place in the circular economy
- Promoting Wool's position against synthetics



DRIVERS: AWARENESS OF FAST FASHION IMPLICATIONS



TREND: NATURALLY SOURCED FASHION MATERIALS



BRANDS: GUCCI, STELLA MCCARTNEY

# Health is Wealth

## DRIVER

Wellness is fashionable and very much trending. The evolving wellness movement and industry is supplanting the scientific, white-coat authority of the healthcare industry.

## Trend

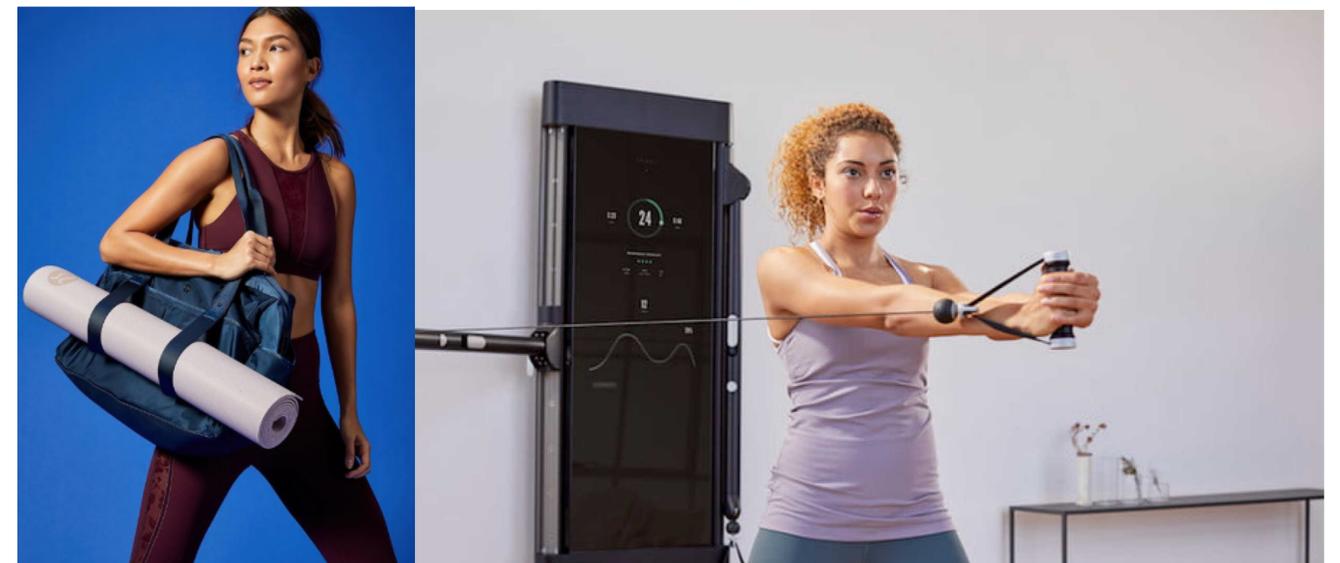
Consumers are looking for a holistic, user-led approaches that address both body & mind. Solutions and products that go beyond simple problem-solution, but sell the notion of optimisation.

## Wool's Opportunity

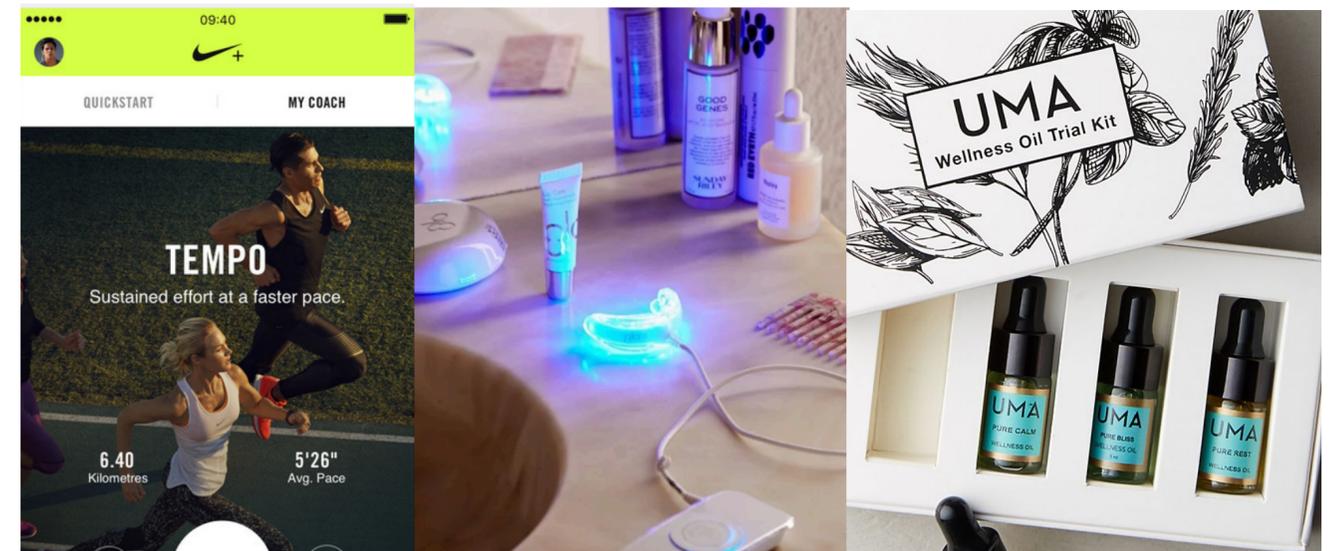
- Sports, comfort, lounge, travel
- Skin health
- Sleep health
- Environmental impacts
- Ageing populations / silver spenders



DRIVERS: WELLNESS IS TRENDING



TRENDS: WELLNESS AS PERSONALISATION AND OPTIMISATION



BRANDS: NIKE RUNNING APP, ELITE BODY CLINICS, UMA WELLNESS OILS

# Health is Wealth

## Optimised Fire Resistant Base Layer

An investigation on the ability of market available wool blend garments (FR and otherwise) to protect against heat and flame damage.

## Global Eczema Study

Assessment of potential therapeutic effects of Merino wool clothing in different geographical climates on atopic dermatitis in infants aged up to 5 years using clinical, quality of life and physiological outcome measures.

## Wool's Dynamic Benefits

Addressing gaps in demonstrating wool's dynamic benefits.

## Sleep Study

An investigation of the impact of sleepwear fibre type on menopausal sleep quality.

END  
DATE

24/06/2019

30/04/2020

30/04/2021

15/12/2021



# Material Futures

## DRIVER

The rise of robotics and technology is touching every aspect of human life.

## Trend

The world of intuition and personalisation means some of the most exciting developments in fashion aren't happening on the runway, but in the lab. From fabrics that absorb sweat better, to materials that generate power through motion.

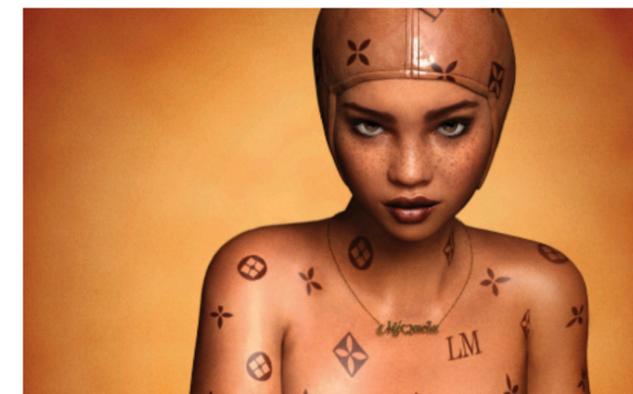
## Wool's Opportunity

- Pushing the potential of The Wool Lab
- Talent incubation and innovation programs
- Dedicated trade engagement program (trade show strategy)
- Thought Leadership initiatives

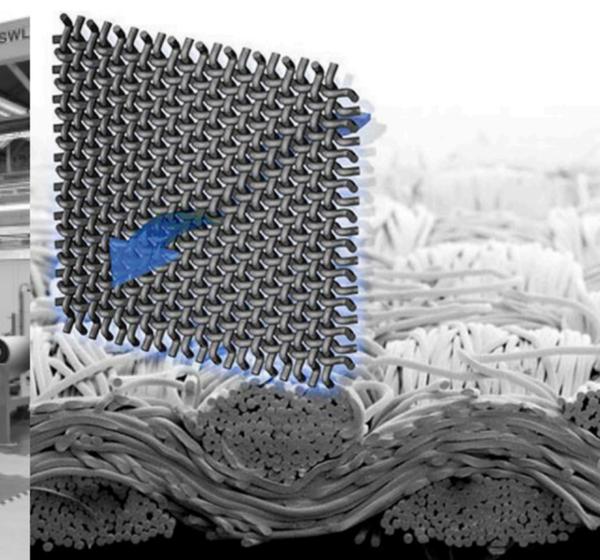


MAY 28, 2018

## Lil Miquela and the age of artificial influencers



DRIVERS: EVOLUTION OF TECH



TRENDS: TECHNICAL TEXTILES & FUNCTIONAL FABRIC



PREVENTS APPROX. 11 PLASTIC BOTTLES FROM ENTERING OUR OCEANS

BRANDS: ADIDAS PARLEY

# Inclusive Diversity

## DRIVER

Diversity and gender fluidity have gone mainstream in the 21st century.

## Trend

Luxury brands have begun — but will continue to experiment more outside of the traditional confines of what is ‘for men’ and what is ‘for women’, in a celebration of diversity.

## Wool’s Opportunity

- Local Marketing programs - trade & influencers
- New categories (Genderless)
- Emerging markets
- Impact visual content (Gen Z & Millennial)



DRIVERS: INCREASE IN DIVERSITY & VISIBILITY ACROSS CULTURE



TRENDS: GROWING GENDER FLUIDITY IN HIGH FASHION

## Chanel Releases Makeup For Guys

Chanel is set to launch Boy de Chanel, a new makeup collection for men. - by Sally Humwick



BRANDS: CHANEL MAKEUP FOR MEN, BURBERRY GENDERLESS

# HOW WE WILL ENGAGE GLOBAL CONSUMERS

## TASKS

*WHAT*

**DRIVE REAPPRAISAL**

**COMMUNICATE WHY WOOL IS  
DIFFERENT AND BETTER**

**GET PEOPLE TO ACT**

## AUDIENCE BEHAVIOUR

*WHY*

*Consumers don't need wool, they  
need garments that suit a purpose  
and reflect their personal values*

*Consumers have mental  
associations of wool that we need to  
break and position wool as relevant  
to their everyday lives*

*Consumers need persuading to  
consider buying wool*

## ENGAGEMENT PILLAR

**DISRUPT**

**GET PEOPLE TO RE-THINK WOOL  
BY CONNECTING WITH EMOTION**

**PROVE**

**SUBSTANTIATE THROUGH  
DIFFERENTIATED PRODUCT MESSAGING**

**CONVERT**

**DRIVE CONSIDERATION**