



THE DECISION MAKER

Why mail is the channel
that counts for choices
that really matter

 **marketreach**
unleash the magic of mail



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FOREWORD



Amanda Griffiths, Head of Communications Planning at Marketreach

When I started out in advertising, most marketers tended to have a shared view of the media world.

It felt like we shared the same 'map' of how to get our brands to where we wanted them to be on the customer journey. Marketers all instinctively knew where our 'North' was.

We had a lot of insights about what messages we needed to deliver when and through which media to help consumers along the path to making their minds up.

TV's A/V mix was all about brand messaging. So was the vast majority of press advertising. Mail's space and potential for creativity in three dimensions gave it a different power. Which made it ideal for providing customers with the information they needed to make the right choice, along with a big helping of emotion.

Now, digital media has completely revolutionised the world of marketing. For a start, it's muddied those nice divisions between brand and action-driving media. And made the decision-making process feel messier.

Sometimes it can feel like everything is now part of the 'messy middle' of the customer journey. The 'map' we used to share has become a lot more difficult to navigate. It can be hard to work out where our 'North' is.

And yet 'North' hasn't really moved at all. Sure, we may think of our world as one of 'instant' choices – fast thinking. But the reality is that many choices still take time and careful consideration.

Choosing the right mortgage, the right car, the right insurer, the right holiday, or even the right coat isn't something most people feel comfortable deciding in mere minutes. Customers want to explore their options, revisit the information, and often share it with friends or family before making a choice.

Mail allows them to do exactly that. It stays in a home for as long as it's needed, ready to be picked up, read and re-read, and acted upon. It's tangible, so it feels like it 'belongs' to the reader. And it's a whole lot more convenient and more personal than bookmarking web pages or trying to save a TV ad.

At its core, marketing is about showing customers why a brand matters to them. And, ultimately, it's about driving them to take action.

Businesses still need a truly integrated customer journey – albeit one that now spans many

more touchpoints, across different media, each serving a unique role. Some of those media will certainly be digital. Some may be more traditional above or below the line channels.

The customer journey might be more difficult to plan, but as we said, 'North' has not moved.

Which means mail still has a very important role to play in that journey.

Mail is popular with customers. It waits to be read until they have time to give it time. Young people really notice it – perhaps because they receive so little of it. Something addressed to them stands out and commands attention.

If digital is disruptive, then mail is doubly so. It comes through your letterbox into your home. It's even got your name on it.

At a time when trust in online messaging is being questioned, research shows that mail is highly trusted as a medium, a powerful advantage. Mail continues to play a critical role in the media mix, delivering impact in ways other channels simply cannot.

I regularly hear from industry leaders that they 'love' direct mail, waxing lyrical about the creativity and engagement of the channel.

But I also hear from results-focused brand owners and CFOs who value the strategic, results-based power it delivers to their businesses.

Marketreach is proud of this groundbreaking study. We're confident it will reaffirm for marketers where 'North' is and how mail will get their customers to the right destination on their journey.



01 WE'RE STILL LIVING IN THE REAL WORLD

People rely on 'real, three-dimensional' media to make 'real' decisions

Even as our media landscape becomes more and more digital, people increasingly have a growing desire to interact with the physical world.

We see it every day. As streaming grows in popularity, so do vinyl records. As e-readers and podcasts take hold on people's lives, real books are still being bought and read. In a world of zeroes and ones, people crave reality.

And even in a time of apparently instant decisions, lots of us still need to take our time over choices that really make a difference. We're still willing to engage with what matters.

At Marketreach, we wanted to know the facts about how different media affect people's decision-making.

This is the reason we commissioned a significant piece of consumer research before and during the 2024 General Election campaign.

We compared how voters noticed, trusted and responded to communications across a range of different media, both analogue and digital.

Of course, these voters are consumers too. So they can also give us a snapshot of how society is feeling about different media.

Before the election, many experts predicted that the General Election would be digitally dominated. We needed to see if these expert opinions were grounded in reality.

It is true that digital media are fantastically good at communicating some things to some audiences. They can be used quickly. They are a relatively cheap way to reach a large number of people. And they can be immensely engaging.

But it can also be easy to forget that digital media are not always the most effective channels through which to reach and influence customers at every stage of their decision-making process. (As our research proves.)

In fact, one of the clear conclusions of that

research shows that the only way to influence an audience's decision-making in the most effective way is through genuinely integrated campaigns. That includes marketing mail.

The research shows that mail is a very powerful tool for:

- Creating engagement among prospects, customers and supporters
- Giving people the information they need to consider when they're making a complex decision (like who to vote for in an election or an AGM; which expensive new car to buy; whether to go on a cruise in the Norwegian fjords or the Caribbean; whether to include a legacy to a particular charity in your will)
- Persuading people to take action
- Providing customers and prospects with an involving, physical communication. An object that they can hold in their hand, keep and go back to, allowing them to explore and investigate a range of content that will help the reader make the right decision for them

This report summarises the results of our findings. We think you'll find it stimulating reading.

Method

Marketreach commissioned a nationally representative, multi-stage, mixed method market research programme to take place around the 2024 General Election. Carried out by Thinks Insight & Strategy, it consisted of four quantitative surveys (early, mid, late and post election). In total 3,920 UK adults aged 16+ completed at least one survey with 1,079 respondents completing all four waves to give us a longitudinal view across the full study.

This quantitative approach was complemented with qualitative research using online communities of voters in three 'swing-seat' constituencies during and after the election campaign.

The research includes a sample of pre-voters, age 16-17 given their importance as future voters. This segment is included in total sample data.

02 EXECUTIVE SUMMARY

The research gave us a clear message: Anyone who forgets the importance of marketing mail does so at their peril.



The results of our research are very clear indeed. Despite expectations that digital would monopolise, mail was the single dominant medium.

And as voters are also consumers, the conclusions are important for marketers beyond the political sphere.

There are a number of reasons for this, as this report demonstrates, and all of them have significant impact on marketers in all sectors.

These include:

Mail is the only medium that reaches everyone

Regardless of age or location, mail is the single medium that enables organisations to get their message into the hands of all the people they want to reach.

Mail is trusted

One of the most powerful outcomes of this research is that it confirmed that mail was the most trusted medium. This has great significance for decisions that really matter. Especially at a time of great concern about ‘fake news’ and AI involvement in ‘scam’ communications.

Mail is held onto for longer than other media

Many of our respondents kept their mail and used it right up until the day they needed to make a decision. Our experience and other research carried out by Marketreach proves that mail is retained and consulted for far longer than other media. Customers can’t go back to a social media ad once it has left their feed, or consult a newspaper or TV ad that they first saw weeks earlier. They *can* pick up a catalogue or a letter they have saved to read at their leisure from their coffee table or kitchen counter.

Mail makes people think

Mail has the physical space to explain complex arguments in detail. This is one of the reasons why it is favoured for delivering involved communication making it ideally suited to telling detailed stories about pensions and investments, holidays or cars for instance.

Mail stands out through its physical presence in people’s homes

Unlike almost all other marketing communications, mail occupies a space in your audience’s home. It comes through their front door, into *their* personal space.

Mail helps undecided people decide

42% of the respondents in our research were uncertain of who they might vote for at the beginning of the election campaign. These ‘Sway’ voters in particular believed that mail had been the most impactful channel in informing their decisions and increased their confidence in who to vote for. This was the largest group in our research, and is likely to be significant in any pool of prospective customers.

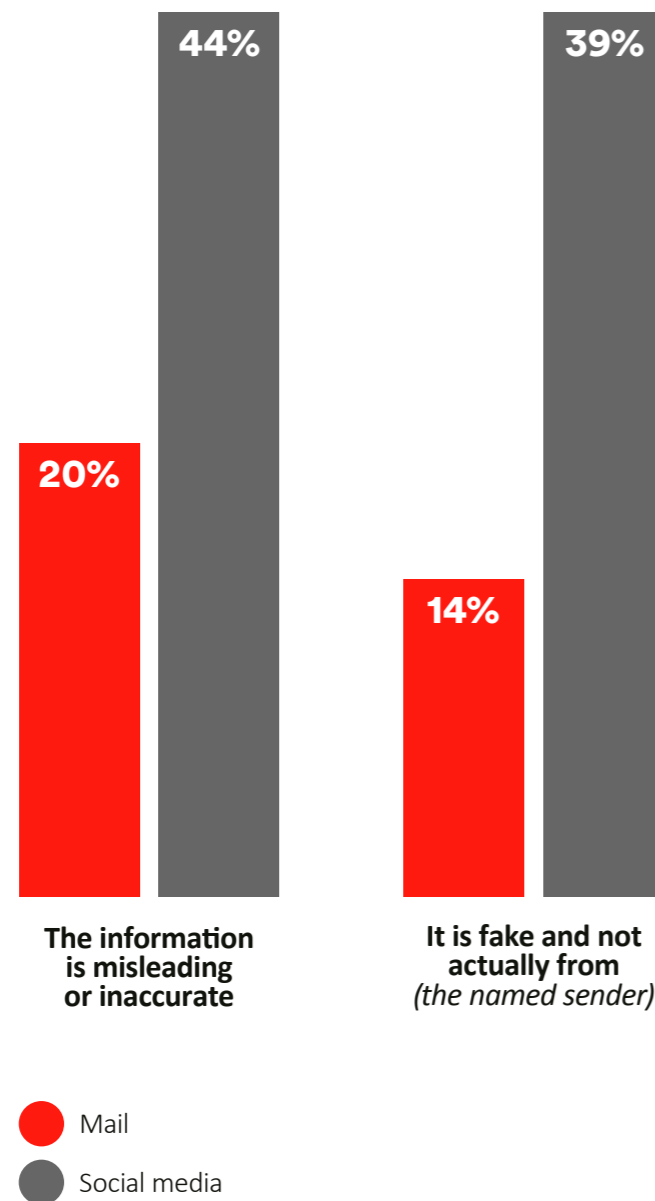
Mail is popular with young people

This is one of the most significant findings from the research. Contrary to pundits’ expectations, mail was extremely well-liked – and even welcomed – by young voters who received it. These members of Generation Z were one of the reasons why this General Election was expected to be ‘really digital’. In fact, their response to both direct mail and door drops helped make it ‘really analogue’. If you’re targeting a younger audience, mail has the potential to give your message a real boost.

03 TRUSTED. NOT SUSPECTED

Concerns associated with channels

Showing % of all respondents selecting each channel in relation to each concern



Respondents to our research told us one of their largest concerns was about the possibility of receiving misleading communications. The medium they were most worried about was social media.

In contrast, mail was trusted, because it is seen as much less likely than an organisation's social media to be fake news or the product of AI interference. This is true even for younger people, who see mail as the most trustworthy communications medium.

We believe these degrees of trust in mail hold true when it is used to deliver all messages – whether commercial, charitable or from government.

Converting the undecided

In our research, the largest single group of voters, 42%, was made up of those who started as 'sway voters'. These were individuals who had intentions to act, but had not yet decided what action to take.

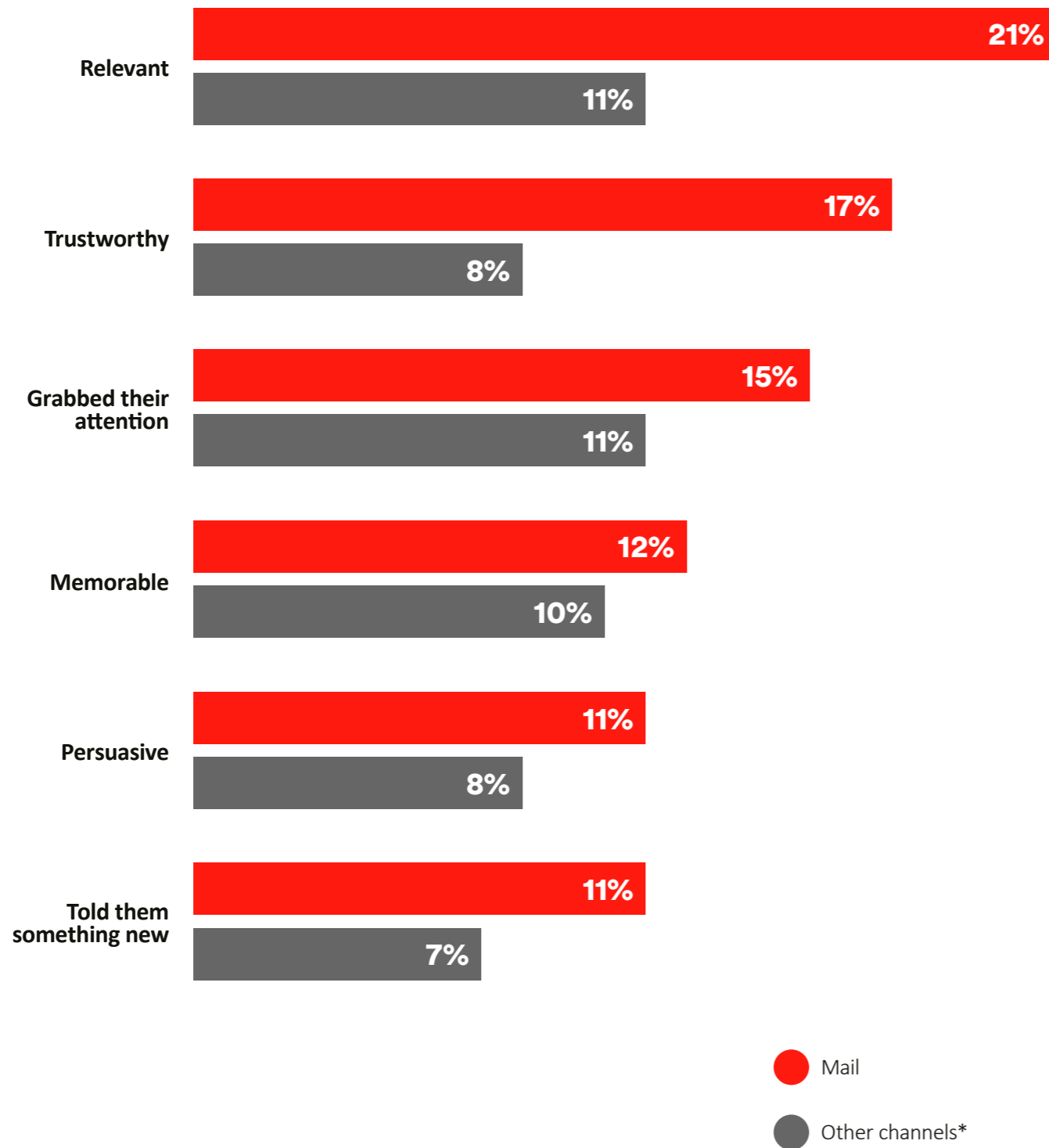
Mail reached this group powerfully and effectively – providing crucial information to help them make their decision. They were most likely to report engaging with mail, showing that they were actively seeking information to help them make the 'right' decision.

Mail stood out as the communications channel with the greatest effect on their decision. It gave them more confidence about their ultimate choice. They also had more positive perceptions of mail than they did of other channels.

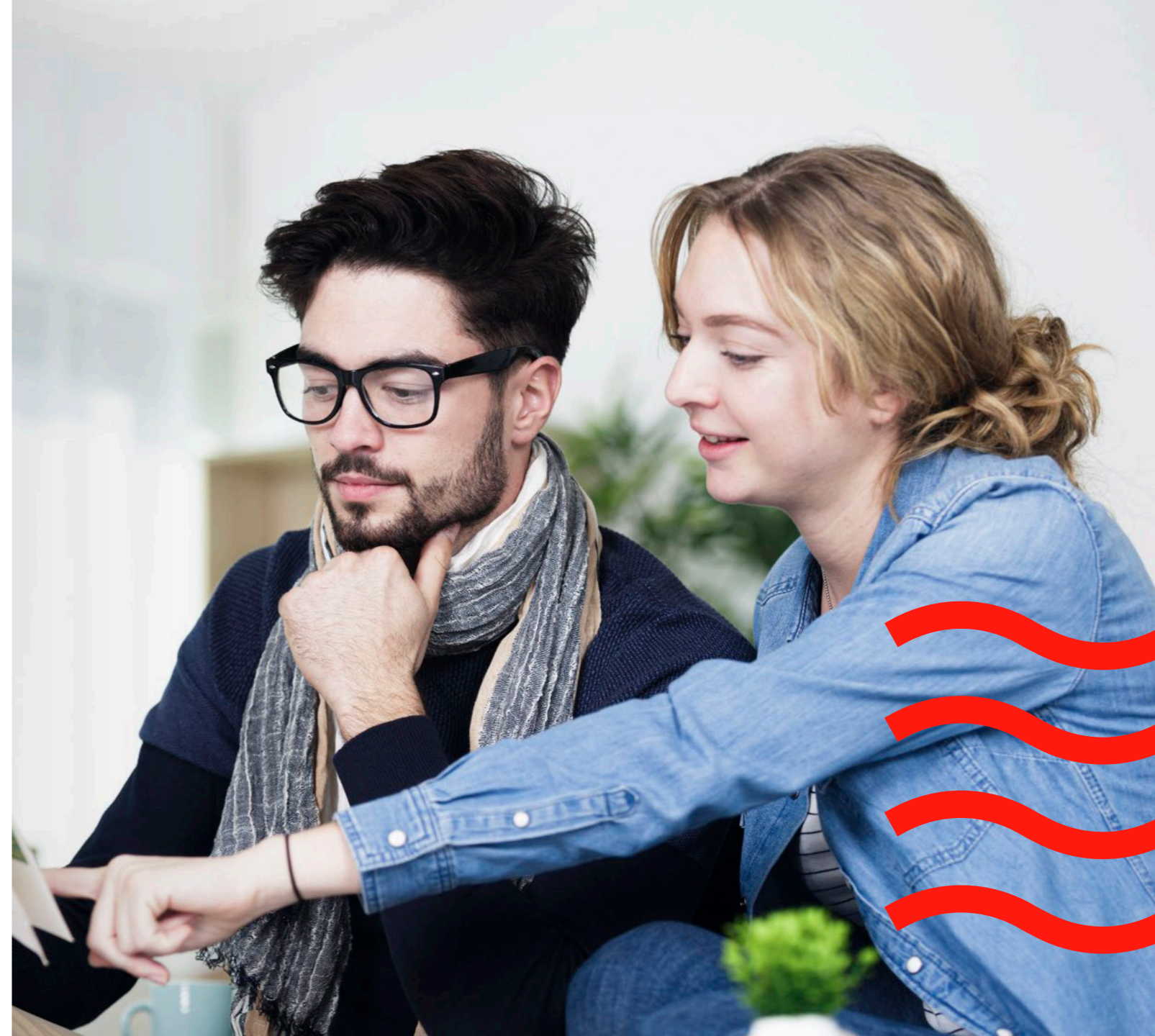
04 CONSIDERED. NOT IGNORED

Views on information from channels

Showing % of respondents selecting each statement per channel



*Note these figures are averages across party political TV broadcast, social media, posters and online advertising.



Mail makes people think

Mail was reported as more than 50% more effective at prompting thought about their intentions than other channels. This ability to make audiences think is one of the key advantages using mail can give your organisation.

Respondents also told us that mail had a number of advantages over other communications channels:

More control. People can read it in their own time, at their own pace – and re-read it whenever they want. Mail can be retained, and does not simply disappear in the way that online ads and social media posts can.

More standout. Many people – especially young people – simply do not receive very much mail. This makes mail more memorable and noticeable when it does arrive. Especially when it is clear, visual, and colourful.

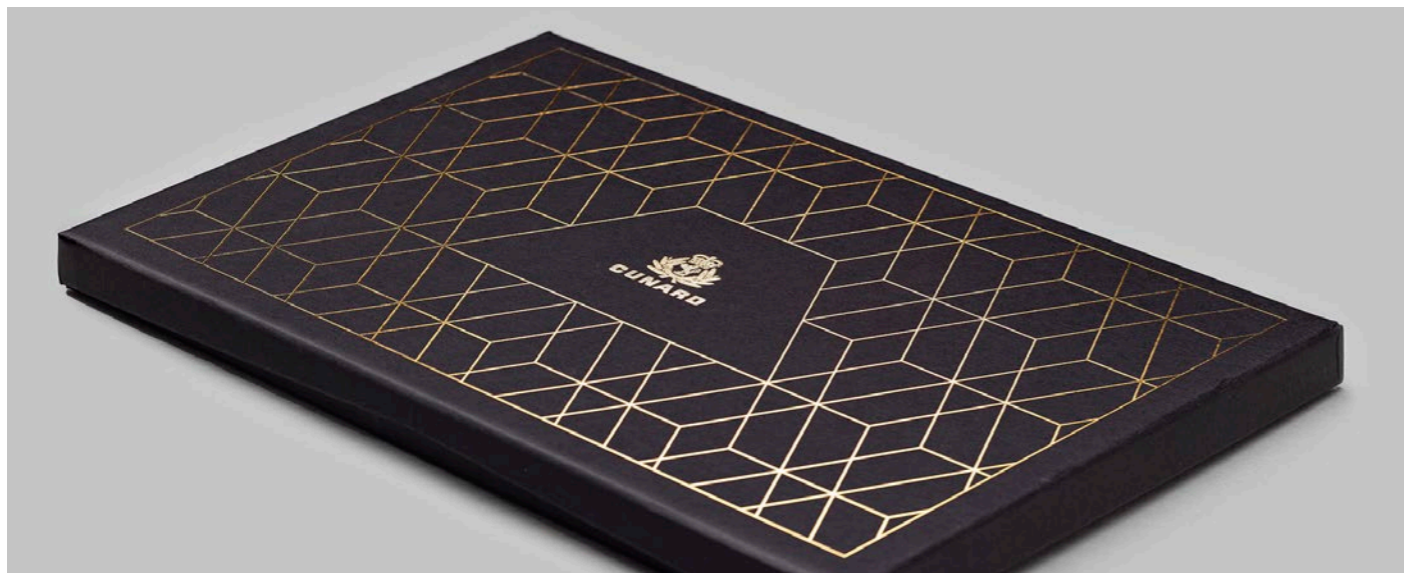
For this audience, mail can be a clear ‘zag’ when the rest of the world is ‘zigging’ in its choice of media channels.

05 MAIL IS...

VALUED

Receiving a direct mail invitation to join the maiden voyage of Cunard's new ship Queen Anne made recipients feel valued and important.

It also worked; Cunard reported that they enjoyed their busiest booking day in a decade. In fact the whole maiden voyage sold out in less than a day.



TANGIBLE

The tangibility of mail helped Land Rover stand out from the many digital communications customers were receiving. Appealing to families also gave the communication more interest and longevity, with direct mail typically being consumed by 1.2 people in each household.



COST-EFFECTIVE

If you really want to generate a response, mail is an extremely cost-effective channel. For its AGM, Nationwide used technology such as QR codes to improve the customer experience by making voting easier and quicker. It also pushed the CPR down and cost effectiveness up.

AGM 2021

Mr E Mann
12 Woodthorpe Close
Matlock
Derbyshire
DE82 7AB

3031

Nationwide Building Society

Vote at our AGM and we'll donate to Shelter
See our Shelter leaflet for details

Online
Go to nationwide.co.uk/agmvote and use the codes below:

Code 1
99999999

Code 2
9999

Scan the QR code
It'll take you straight to our voting site and your voting codes will be loaded for you.

OR

By post
Using the form attached and the enclosed pre-paid envelope.

Voting ends
Postal and online votes to reach us by
11am on 19 July 2021

Vote and help Shelter do more to tackle homelessness

Dear Mr Sample

Our Annual General Meeting (AGM) is your opportunity to have your say on the way your Society is run and to vote on the people standing for your Society's Board. We'd love you to do so.

This year your vote is even more valuable
That's because this year, we're celebrating the 20th anniversary of our partnership with Shelter. So we're going to donate 10p to Shelter for every vote cast in our AGM up to a maximum of £50,000.

It's so easy to vote
You can:

- vote online at nationwide.co.uk/agmvote - if you scan the QR code, it will take you straight there; or
- fill out the attached form and send it back in the post.

Watch the AGM online
Throughout the pandemic, our primary focus has been on keeping our members and colleagues safe. And in April when we were planning our event, we were aware that even if everything goes to plan, the virus will still be present in the UK at the time of our AGM. So reluctantly we're asking members not to attend this year's AGM in person. You can however watch the event online and this year also ask questions.

See the enclosed **Notice of AGM** for more details.

If you'd like to ask a question before you vote in our AGM
It's really important that we who run your Society hear your voice. So we are also holding an Online Member TalkBack one week before the AGM where we listen and answer your questions. You can find out more by searching 'TalkBacks' on nationwide.co.uk

Thank you for all your support and thank you for voting. It really does make a difference. Especially this year.

David Roberts
David Roberts - Chair

Nationwide Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 106078. You can confirm our registration on the FCA's website fca.org.uk
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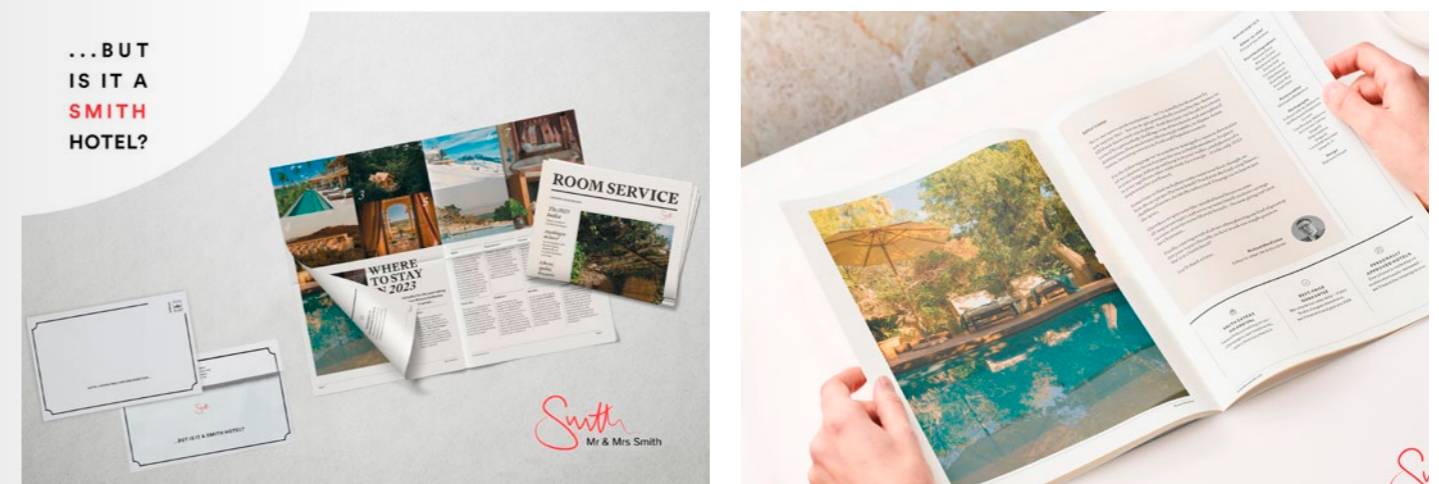
PERSONAL

Why make one general brochure when you can make countless genuinely personal ones instead? Titan Travel found that real personalisation of this kind not only sold more holidays, but also increased brand exposure among their hard-to-reach prospects. That's because many customers enjoyed sharing their 'special' brochure on social media. They were thrilled with the design carefully reflecting their holiday plans and personal choices.



RETAINED

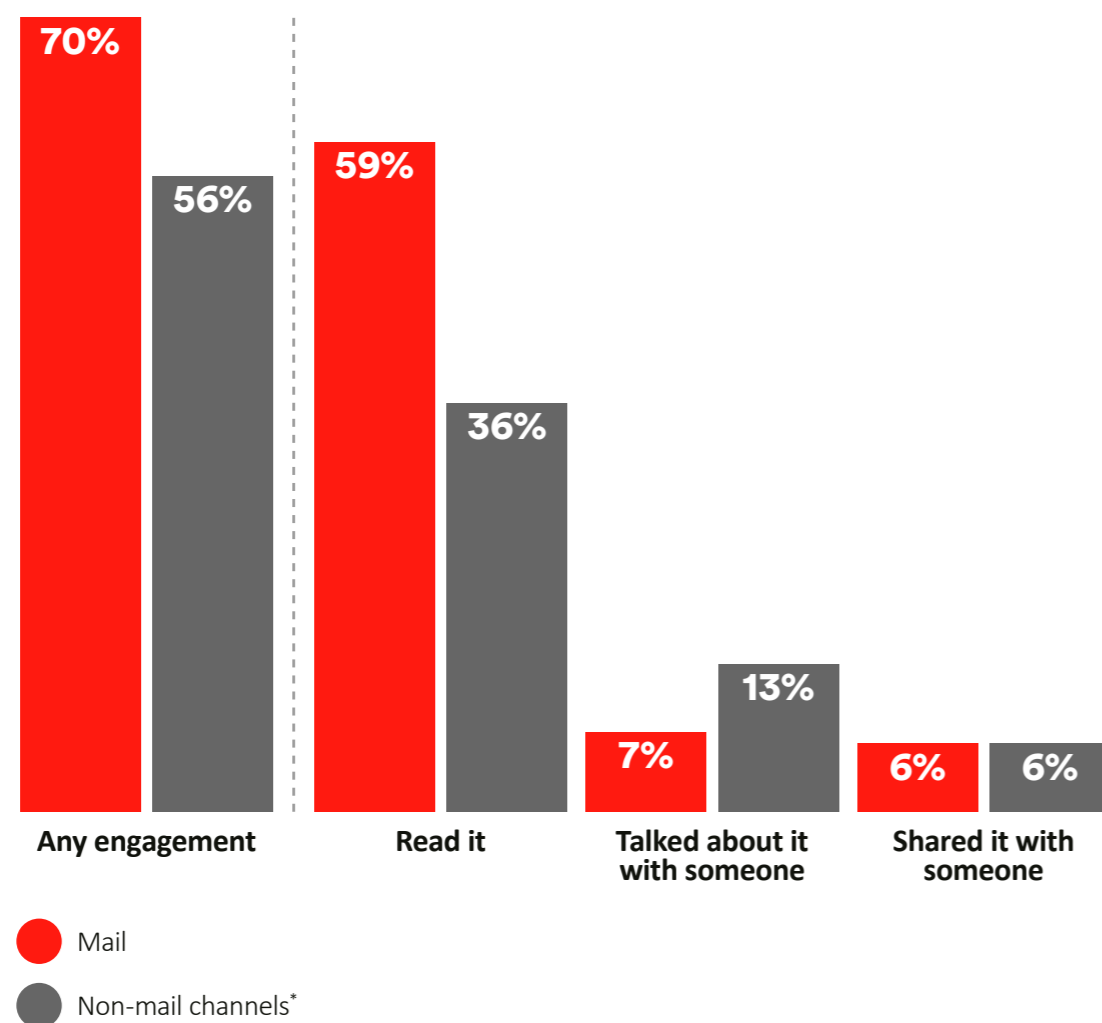
Mr & Mrs Smith's clear strategy used extensive analytics to identify the audience and the content required to drive bookings. It then drew on this insight to create something that 'lived' on the coffee table for a longer time.



06 THE MOST ENGAGING MEDIUM. AND THE MOST READ

Actions taken related to information received via mail and non-mail channels

Showing % of respondents selecting each option



High engagement. High interest

Overall, mail was the medium most engaged with, our research reported. This was an especially powerful finding given this was expected to be the most 'digital' General Election campaign ever.

And mail achieves significantly longer dwell times than TV, digital or press. People take their time reading, talking about and sharing the mail they receive. High engagement coupled with mail's staying power makes it the ideal channel for people to gather the information they need for making important decisions that are right for them.

Mail engages and holds attention because:

- It arrives at people's homes
- Meets a real need that they have for information
- Can be retained

- It can be designed to present a lot of information in an easy to read format
- It can be personalised right down to the level of individual interests

This means it can answer important questions for a huge range of audiences. It is trusted too. Especially compared to digital media it is seen as reliable and less likely to be 'fake'.

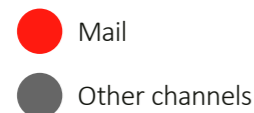
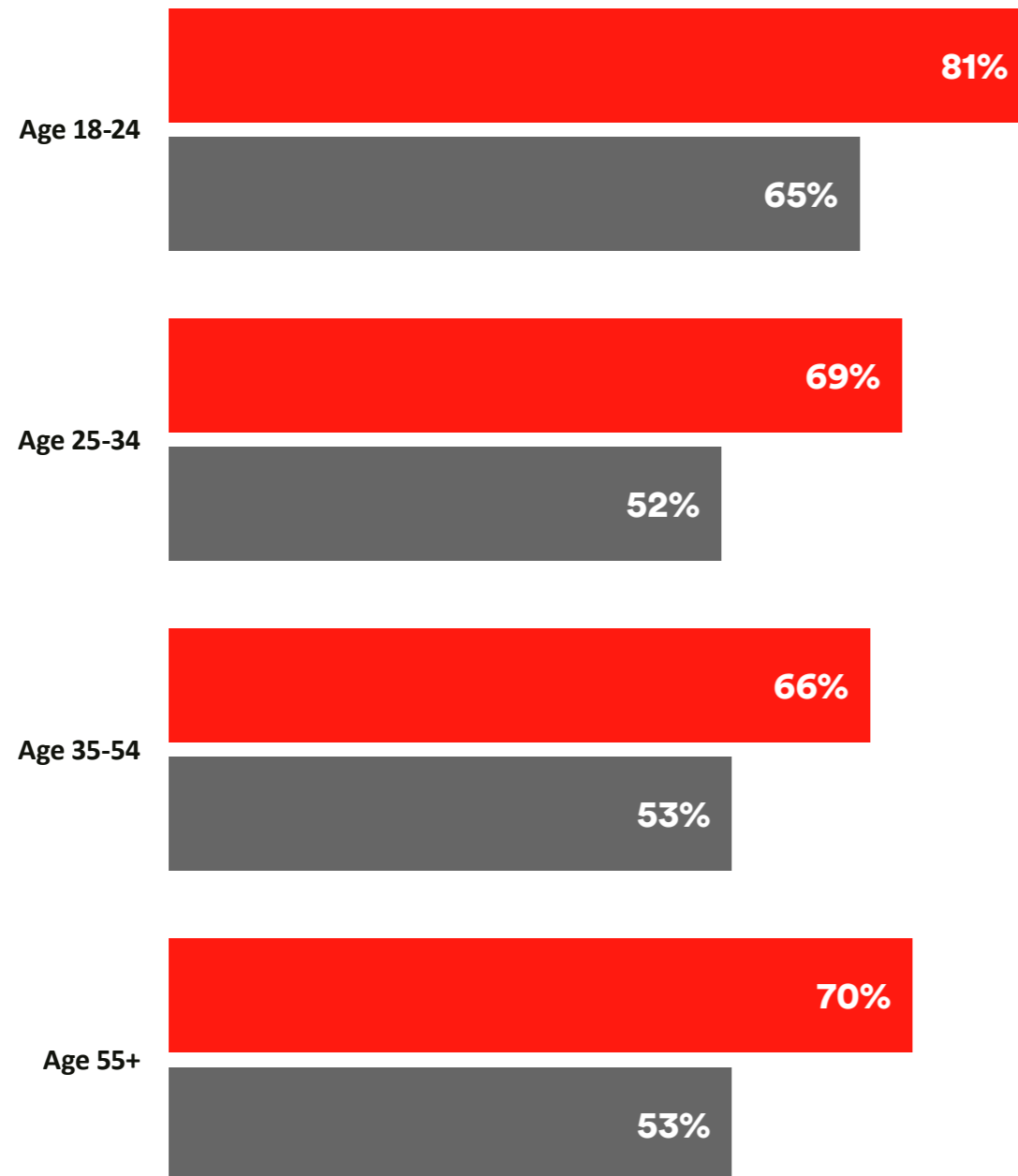
Mail can be personalised for specific audiences. This can be broad-based by geography, such as testing a new product in a new region. It can be selected by house type – enabling marketers to target a specific audience. Or it can be completely individual, with recipients selected on the basis of the last product they purchased.

Mail is ideally suited to helping support decisions that take more thought than an instant choice to buy or not. These may be big-ticket purchases, or ones that are very close to the recipient's heart.

07 LOVED BY THE YOUNG

Actions taken related to information received

Showing % of all respondents reporting some engagement



We did not assess engagement with TV party political broadcasts in the same way as mail as PPBs aren't read, so these figures exclude them.



Mail is inclusive – it reaches all audiences, while other media don't

We have already said that mail enjoyed the highest levels of engagement of any of the communications channels covered in our research.* This is true among all age groups.

This is perhaps a surprise, as our younger voters might well have been expected to regard digital channels as more engaging. The reality turned out differently for Generation Z.

Indeed among 18-24-year-olds more than four in five (81%) said they had engaged with mail during the run-up to the election. This is almost 10% higher than the figure for social media (72%), and much higher than those for OOH (67%), online advertising (64%) and party political broadcasts on TV (51%).

While younger voters did engage with digital, this was not to the exclusion of mail. In fact, they engaged with a mixture of both channels.

Mail seems to enjoy a 'boost' to its effectiveness among younger audiences, perhaps because of its relative rarity. When people generally do not receive much mail, what they do receive stands out more.

*The only exception is TV party political broadcasts, which obviously cannot be assessed in the same way as mail.

08 WHAT OF THE FUTURE?

Simple ways to make your mail even more effective

Give people what they want

Time and time again respondents to our research showed that they engaged with mail. They trust it more than other channels. They read it and keep hold of it longer than other communications.

Targeting is crucial

Mail can be targeted very closely indeed – home by home or person by person. Addressed mail can ensure that your messages are opened, while partially addressed mail enables you to target around 15 households with a single message.

Mail allows you to personalise your message right down to the level of the individual; so you can use data-driven insights to persuade your prospects, customers or donors.

Age is important

Across all age groups in our research, mail generated the highest levels of engagement of all communications channels. It was also the most impactful, the most read and generated the lowest level of suspicion about being fake or a scam.

Assuming that young people will only respond to digital media could be a very expensive mistake for any marketers to make. Mail is a medium for everyone.

Integration is important

Mail can do the heavy lifting when it comes to delivering information, but it does not have to do the whole comms job on its own. It works best as part of an integrated campaign alongside other channels such as press, OOH, TV and digital advertising.

Consider sustainability at every stage

It is important to consider the circularity and sustainability of mail at every stage of its design and production. Recipients should be encouraged to recycle their communications once they are finished with them and their decision is made.





09 CONCLUSION

Our research proved that mail played a significant – and perhaps the dominant – role in influencing election choices.

We saw that mail communications are more trusted, more engaged with, more widely read and held onto for longer than those from other media.

Mail is particularly popular with younger audiences, who, while they may be digital natives also live in and value the wider, tangible ‘real’ world.

Mail had a powerful impact on one of the most personal and important decisions any audience can take – exercising their democratic right to vote.

If mail can still make itself heard in the midst of such a huge amount of digital noise, then surely it can have even more power in many other decision-making situations, no matter how pressurised. When you need both to engage your audience and to persuade them to take a decision and act on it, then mail can deliver for you.

At the right time and place in your customers’ journeys, mail can be the difference that makes the difference.

Marketreach is the marketing authority on commercial mail. We help organisations and agencies to make the most of mail's effectiveness in order to gain a competitive advantage.

We provide research, information and tools to help you stay in touch with all the latest innovations and opportunities mail offers you.

To find out how you can unleash the magic of mail, visit marketreach.co.uk

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unleash the magic of mail

