

White paper

The attention advantage:

Exploring the impact of mail in an attention-scarce world

WARC

marketreach
unleash the magic of mail







About this report

This report presents new findings and analysis on the benefits of mail as a marketing channel.

There are four chapters in total, covering the emergence of new consumer behaviours; the attention advantage of mail; the role of mail across the marketing funnel; and recommended actions for brands to leverage attention to mail.

The insights are based on independent research commissioned by Marketreach, as well as interviews with leading industry professionals and detailed analysis by WARC.

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Foreword from WARC



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For a long time, marketers have operated under the assumption that exposures to advertising (impressions) work identically across different media channels. Indeed, this is the entire premise of reach-based planning, which – as we know from decades of marketing effectiveness research – is critical to market penetration and brand growth.

But there's a problem. According to experts such as Karen Nelson-Field and Mike Follett, the way we count and value impressions across different media channels is flawed. That's because there is a vast gap between what is deemed an impression and what a human actually does when they are exposed to an ad.

As research has demonstrated, most ads don't get the requisite attention they need to be remembered. And being remembered

is important because it means consumers are more likely to recall a particular brand in a buying situation.

It is against this backdrop that attention metrics have emerged as an additional filter through which to assess advertising impressions. The early evidence is promising, with increases in attention linked to improvements in metrics like brand recall and brand choice.

This white paper builds on previous attention research by examining attention for one specific media type: mail.

This isn't the first time WARC has looked at mail. In 2021 we published a paper, in collaboration with Marketreach, examining campaigns that had used Direct Mail within the marketing mix. What we found was that Direct Mail can act as a real differentiator, delivering against brand, performance and commercial goals while offering high levels of memorability and engagement.

We wanted to build on that work in this year's report, but with a special focus on attention. What we've found is really compelling. Not only is mail highly effective at generating meaningful media attention, it's one of the most cost-efficient channels at delivering against this objective.

For this reason, amongst several others, this may be a good time for marketers to reconsider the role of mail. In a world where the battle for attention is becoming ever harder to win, the channel can be a powerful addition to the media mix.

The view from Marketreach



Patrick Malone

Senior Media Planner
Marketreach

The concept of attention in advertising has been around for a few years, and there have been numerous studies from industry powerhouses, such as Lumen, Ebquity, and PwC. In a highly fragmented media environment with an ever more distracted audience, it makes sense that there has been a lot written on this subject. But in a screen focused world, non-screen media is not always included or considered.

Therefore, we at Marketreach needed to develop an approach, to give us a voice in the attention conversation, to show how the mail channel stacks up against all the others within the media sector.

We commissioned independent research to quantify the time people spend engaging with mail, with a view to creating robust results that reflect the true power of mail's engagement. There is already an existing attention measure provided by JICMAIL, the industry standard audience measurement data source for mail, which has laid the foundations for attention to mail.

JICMAIL's attention measures currently report attention by mail type from between 55 and 159 seconds, truly standout metrics within a media industry that is arguing the difference between 2 and 3 seconds.

What guided this further research was a desire to gain insight and provide real life behaviour-based metrics on the power of mail to hold readers' attention. We wanted to accurately determine how much attention people are giving their mail in seconds and across different mail types, understand how mail achieves that and what value that delivers, and establish how this compares to other media.

To meet our vision, our research partner Blue Yonder deployed an innovative three step approach. Innovation in technology through the use of Clickscape has been combined with post interaction surveys with participants to assess impact as close to the moment of truth as possible. This in-depth fieldwork was then followed by a final survey examining overall behaviour around mail and leading to some fascinating conclusions.

The research paper you are about to read is a persuasive exploration into the intricate relationship between attention and mail, which has been formed through our partnership with WARC into a compelling story. It delves deep into the mechanisms of advertising, attention and mail, shedding light on the complex interconnections that govern our modern consumer landscape. This work is the result of dedicated months of research by Blue Yonder and rigorous inquiry by WARC and Marketreach, offering valuable insights that have the potential to reshape the strategies and practices of advertisers, marketers, media and communication professionals alike.

As we stand on the cusp of a new era in advertising, one marked by evolving technologies, shifting consumer behaviours and heightened privacy concerns, this research paper serves as an indispensable guide. Its findings offer strategic guidance and actionable recommendations to navigate the intricate terrain of advertising in the context of attention and mail.

Executive summary by chapter

1 Mail enables brands to respond to changing consumer dynamics and the challenge of attention scarcity

We are witnessing a series of trends that argue strongly in mail's favour: the fact that people's lives are more centred on the home; the demand for more personally relevant messaging; and a shift towards well-trusted brands that communicate in ways that feel honest and authentic.

A fourth trend is currently occupying advertisers' minds. Meaningful media attention has never been at more of a premium.

Compelling new research from Marketreach and JICMAIL show that mail can help overcome this problem. The studies prove that mail is one of the most effective and efficient channels for capturing consumer attention.

2 Brands need attention to grow. Mail can provide it

Marketing budgets continue to gravitate towards digital, but the evidence suggests many ads on these platforms attract little or no attention.

The picture with mail is very different: it commands undivided attention and extremely high dwell-times. The average Door Drop is viewed for 46 seconds, more than three times as long as the average 30" TV spot.¹ Other mail types attract even more attention.

Marketreach's research demonstrates why mail enjoys this attention advantage. The channel stimulates a physical as well as a mental interaction; over 80% of items that have an envelope are opened. The average piece of mail is viewed more than twice in the week of receipt, and 58% is retained for future reference.

¹ Marketers should pay more attention to attention (marketingweek.com)

Executive summary by chapter

3 Mail can deliver significant uplifts across every level of the marketing funnel

Detailed analysis by WARC and Marketreach has quantified mail's impact on each stage of the path-to-purchase. The findings make a powerful case for mail's inclusion within the marketing mix.

The channel can create and reinforce awareness. In Marketreach's research, two-thirds of respondents could not recall seeing any other form of communication from the sender.

The average piece of mail persuaded 16% of recipients to consider the brand, with 9% saying it stimulated an intent-rich action such as visiting a website or shop. Mail can also 'seal the deal'. On average, 5% of items led to a transaction.

4 To unlock mail's full potential, brands should consider six actions

Our research has identified opportunities for marketers and agencies to capitalise on mail's attention advantage.

Brands should test whether greater 'share of doormat' leads to greater share of market; re-evaluate mail's ability to deliver incremental campaign reach; and leverage its strengths in amplifying other channels.

They should also define when mail will have the biggest impact within a multi-media plan, whilst focusing on creativity to multiply commercial impact. Finally, there are significant opportunities to increase response levels by harnessing digital technologies.

Chapter 1

How mail answers new consumer needs and combats attention scarcity

We are seeing the emergence of significant new consumer dynamics: people's lives are more centred on the home; they expect brand messaging to be more immediately relevant; and they are increasingly turning to brands they trust. Crucially, they're also becoming highly adept at 'blocking out' most advertising.

Mail is one way in which marketers can respond to these trends. Using the latest research, this chapter shows that mail commands very high dwell-times. The channel is both effective and efficient at delivering consumer attention.



Trend #1:

Whether working or at leisure, people’s lives have become more centred on the home

Many of us are now spending a much greater percentage of our waking hours at home.

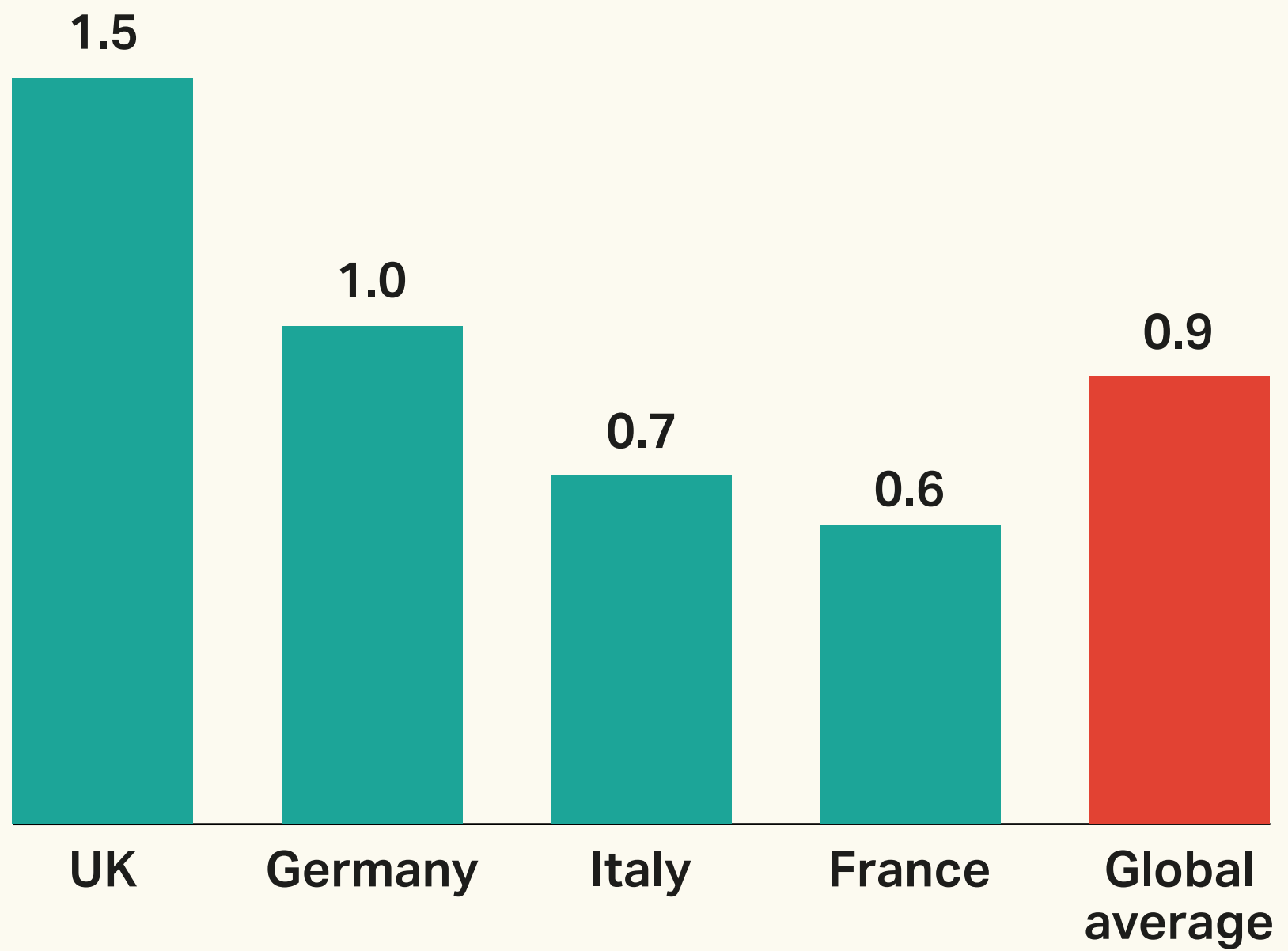
One consequence of COVID that seems here to stay is hybrid working. Recent research has found that the trend is significantly more pronounced in the UK than other European countries.

Hybrid working is only possible, of course, because of the spread of technology into our homes. Digitalisation is providing at-home access to many other activities too, from on-demand entertainment to internet-enabled exercise classes.

Online shopping is another important driver. With the internet and social media making it ever easier to search, discover and order items at the click of a button, we can now enter the world’s largest shopping mall without stepping foot outside our front doors.

The final factor is the cost-of-living crisis. For many people, days out with the family or socialising outside the home have become unaffordable treats.

Paid full days worked from home per week, April – May 2023



Source: Working from Home Around the Globe: 2023 Report | Publications | CESifo

Trend #2: People expect brand communications to be more immediately relevant

Technology, and the ways in which it leverages data, is impacting consumers' expectations as well as their behaviours.

People don't just expect service to be available 24/7; they are judging brands on their ability to deliver individualised experiences and solutions.

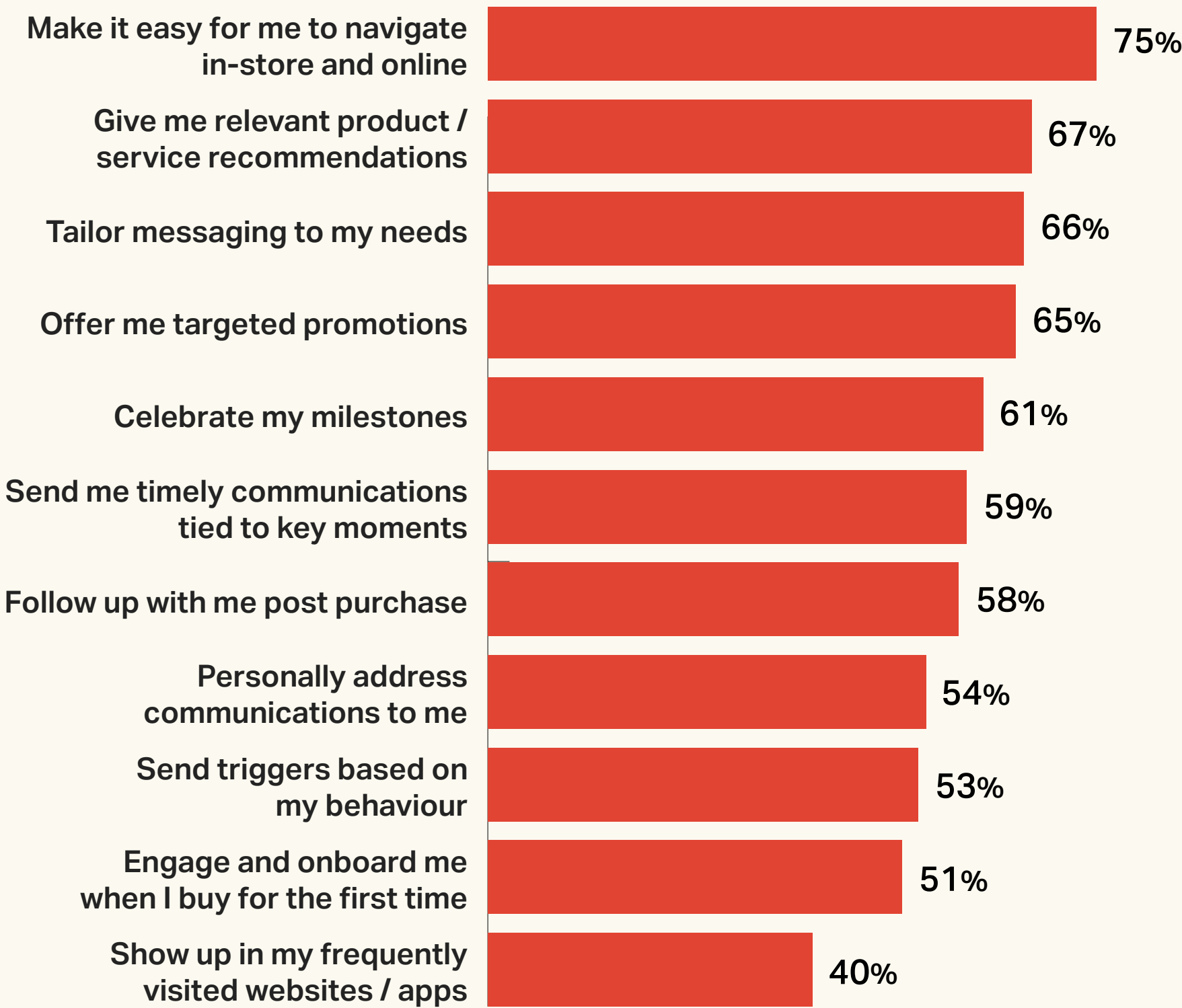
Two-thirds are looking for messaging that is tailored to their specific needs; 59% want timely communications that are tied to key moments and buying contexts; and over half expect messages to be personally addressed.

Brands still need to spend on reach-based activity to create mental availability; but where there's opportunity and economic logic, they also need to invest in building 1:1 relationships.

In some situations, relevant personalisation is now table-stakes.

Consumers expect brands to demonstrate they know them on a personal level

Importance of personalisation actions for customers purchasing for the first time, % of respondents



Source: The value of getting personalization right—or wrong—is multiplying | McKinsey

Trend #3: People are less confident and need greater assurance from brands

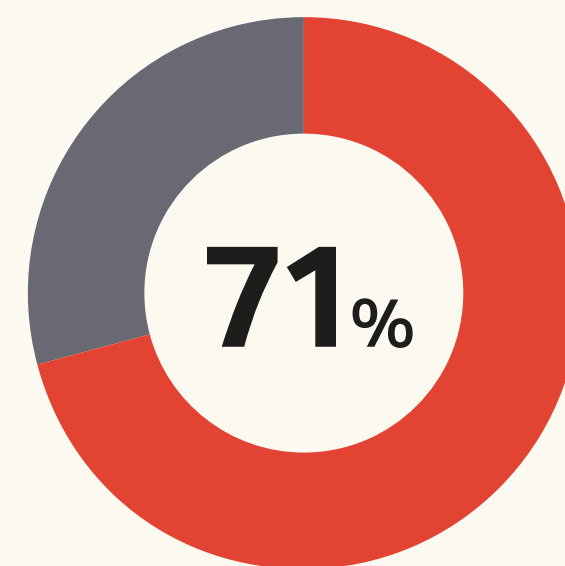
Brexit, COVID, the war in Ukraine, the cost-of-living crisis... since 2016, it feels like it's been "one damn thing after another."

It's not surprising that many consumers are feeling bruised and vulnerable. With money tight, large sections of the population are having to adjust what and where they buy.

At the same time, this lack of confidence and the need to avoid risk are driving people towards brands they perceive as reliable and trustworthy. Globally, 71% say "it is more important to trust the brands I buy or use today than it was in the past."

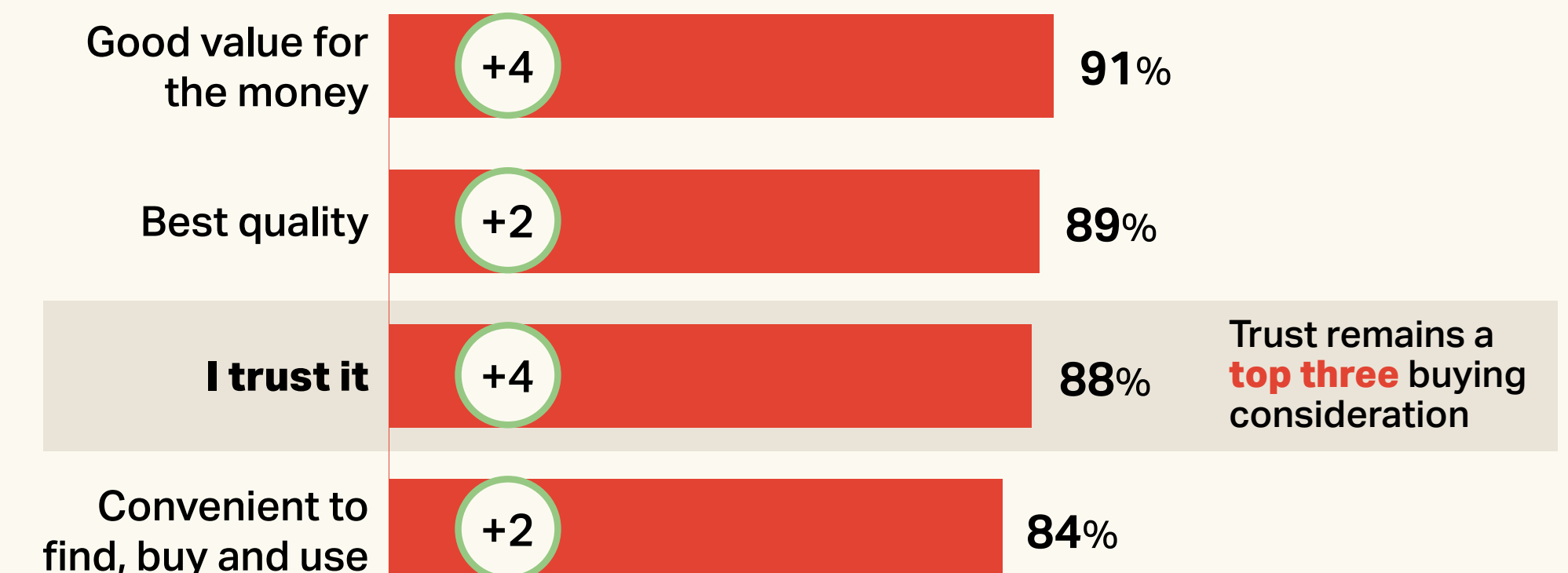
This has implications for how brands should behave from a communications perspective. It places a premium on high quality information, delivered in styles and formats that feel honest and authentic.

When consumers feel vulnerable, the need to trust brands grows more urgent



Percent who say
it is more important
to trust the brands
they buy or use today
than in the past

Top considerations when buying a brand



Source: [Special Report — Brand Trust 2023](#) | Edelman

Trend #4: People are ‘shutting off’ as perceptual loads increase

Commentators have been conscious of the effects of advertising clutter for centuries. As long ago as 1759, Samuel Johnson observed of newspapers that “advertisements are now so numerous that they are very negligently perused.”

Fifty years ago, political scientist Herbert A. Simon gave the problem a name: ‘The Attention Economy’. His core insight was that a surfeit of information creates a poverty of attention.

As media channels proliferate and advertising expenditure continues to rise, the challenge is growing by the year. Our brains simply aren’t wired

to process such an abundance of stimuli, so we instinctively block out all but the most relevant, compelling or entertaining messages.

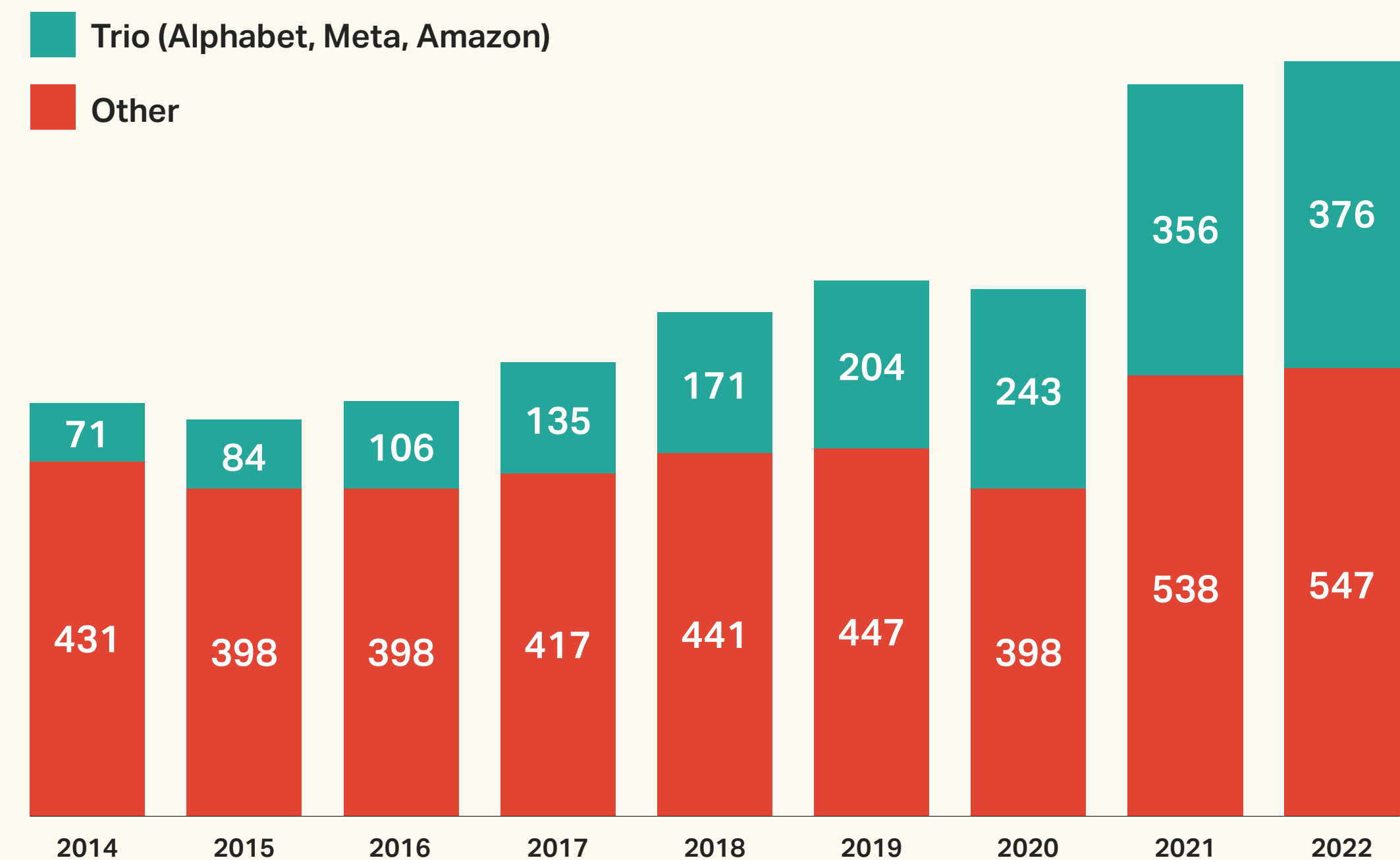
The extent to which this happens depends in part on the environment in which advertising appears. ‘Blocking out’ is most likely to happen in noisy, distraction-rich channels like social or retail media – and these are precisely the areas in which marketing investment is growing fastest.

As Faris Yakob has pointed out: “Attention thresholds are very different on different platforms. Some naturally garner higher attention for longer durations and advertisers should play to this strength.”²

² Attention Planning | WARC

Global advertising spend has nearly doubled since 2014 Digital platforms have soaked up most of the growth

Global Advertising spend - \$ 000 millions, nominal



Note: “Other” consists of all global ad spend except for the three companies named above.

Source: [Global Ad Trends: Media models in flux | WARC](#) and [Ad Spend Outlook 2023/24: Withstanding Turbulence | WARC Media](#)

How does mail map against these trends?

#1:

Whether working or at leisure, people's lives have become more centred on the home

For consumer audiences, mail's initial point of impact is always in the home.

Inherently transportable, mail moves around the house (and sometimes outside it) until reaching the place where it will be most useful: for instance, the study, kitchen or living room.

#2:

People expect brand communications to be more immediately relevant

Whether through full data-driven personalisation or geographic / demographic targeting, mail can be highly relevant to individuals' needs and buying contexts.

Being easy to keep, mail can be retained until such time as the information is required.

#3:

People are less confident and need greater assurance from brands

Mail helps brands to build 1:1 relationships with customers. It offers a rich quality and quantity of information in a format people instinctively trust.

Trust in mail is high overall, and highest amongst Gen Z. Nearly 90% of this segment say they prefer brands that combine physical and digital experiences.³

Its tangibility makes it inherently reassuring in a blink-and-you'll miss it, digital-first world. The very fact of receiving mail demonstrates thoughtfulness on the part of the brand.

#4:

People are 'shutting off' as perceptual loads increase

Mail is both the ad and the medium. There are none of the adjacent distractions so prevalent in short-form, screen-based channels.

At well over 80%, open rates for physical mail are much higher than email; while average dwell-times are substantially longer and more focused than in other media channels.

³ Marketreach, Coronavirus Research, Trinity McQueen 2020.

The evidence shows mail is highly effective at delivering meaningful media attention

Across Q4 2022, JICMAIL (the Joint Industry Committee for Mail, responsible for providing industry-standard audience measurement data), conducted in-depth research of its 1,000 strong panel.

It used a self-reported diary methodology to track how long members of the panel spent over four weeks with each item of mail they received. In total, 10,669 mail pieces were analysed over the quarter.

The findings were broken down by mail type. The lowest levels of attention were recorded for Door Drops, where the average amount of time spent per item was 46 seconds. Reflecting its high personal relevance, time spent with Business Mail was more than three times as long.

How do these figures compare to other channels? According to TVision, the average 30" TV spot attracts 13.8 seconds of attention; whilst Lumen has found the average infeed ad on Facebook receives 1.6 seconds of attention.⁴

Definitions:

Business Mail is based on an existing brand / customer relationship. It is always addressed to an individual and contains content such as financial and loyalty reward statements, bills, renewals documentation and / or administrative, account and appointment related information.

Direct Mail is always addressed to a named individual and contains information about products and services, an offer or a drive to visit a store or website.

Partially Addressed Mail includes address details but not the recipient's names. Like Direct Mail, it contains information about products and services, an offer or a drive to visit a store or website.

Door Drops also contain information about products and services, an offer or a drive to visit a store or website. However, no name or address is included and the majority have no envelope.

Average time spent with mail across 28 days (seconds)

150_{sec}



Business Mail

108_{sec}



Direct Mail

64_{sec}



Partially Addressed

46_{sec}



Door Drops

⁴ Marketers should pay more attention to attention (marketingweek.com)

Source: The time we spend with mail: A JICMAIL Attention Study (2023). JICMAIL

Attention to mail tends to be undiluted

When people consume media, the chances are they're doing something else at the same time. Multi-screening has become a way of life; we habitually scroll through a social feed or check our emails while watching TV.⁵ Radio is often playing in the background whilst we're engaged in other activities.

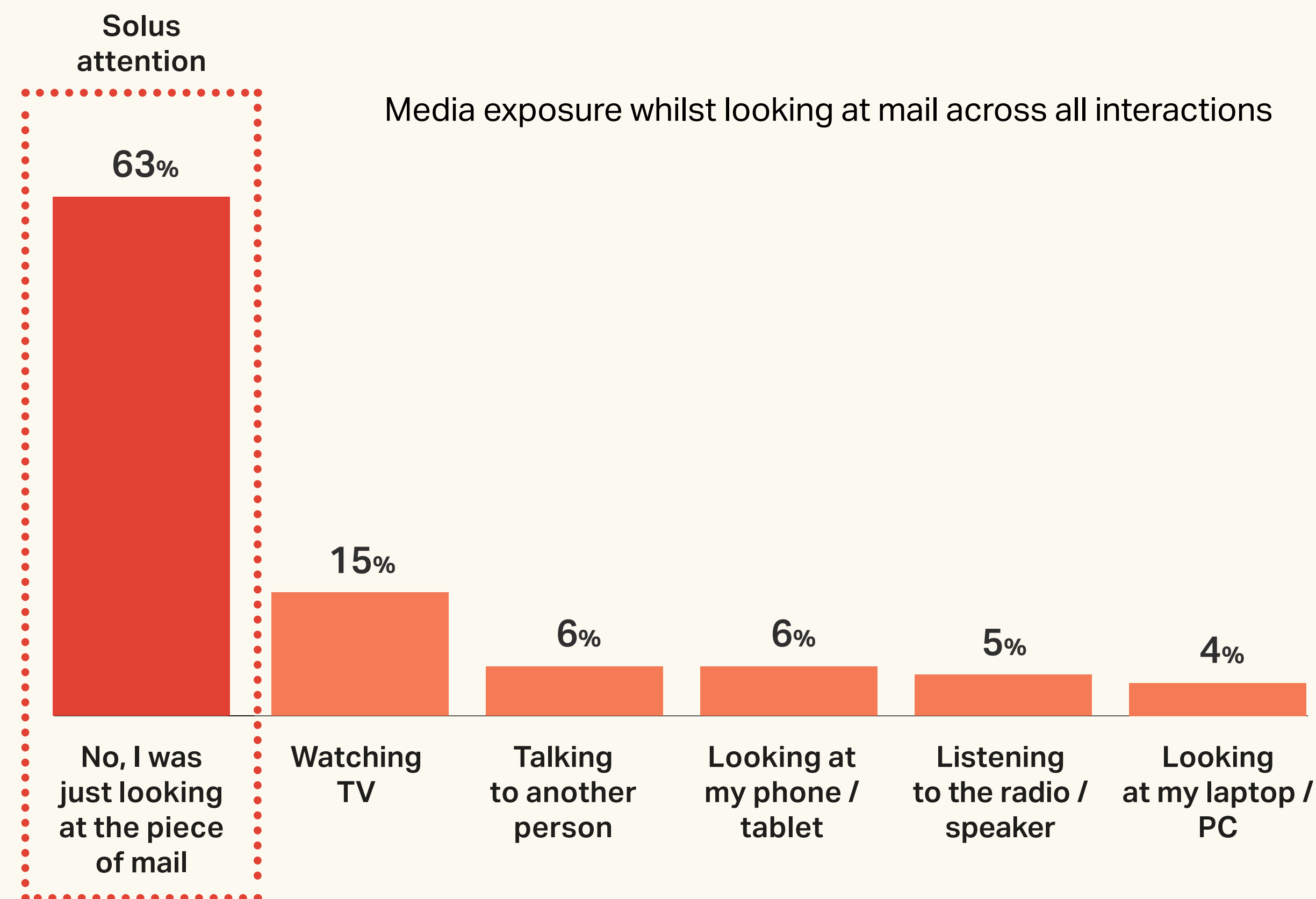
To help inform this report, Marketreach commissioned a major new research study.

One of the key findings was that people are highly focused when looking at a piece of mail. Nearly two-thirds of respondents claimed it attracted their undivided focus. Whether it's the act of opening an envelope or the fact that mail is usually perceived to contain valuable information, the channel is seen to warrant full concentration.

Mail doesn't just provide a high quantity of attention, therefore. It also delivers a high quality of attention.

⁵ Europe, Second screening | WARC

Q: Were you doing any of the below while looking at this piece of mail?



Base: n=2013
Source: Marketreach, Attention Research, Blue Yonder 2023

Mail is often the only communication recipients remember from a brand

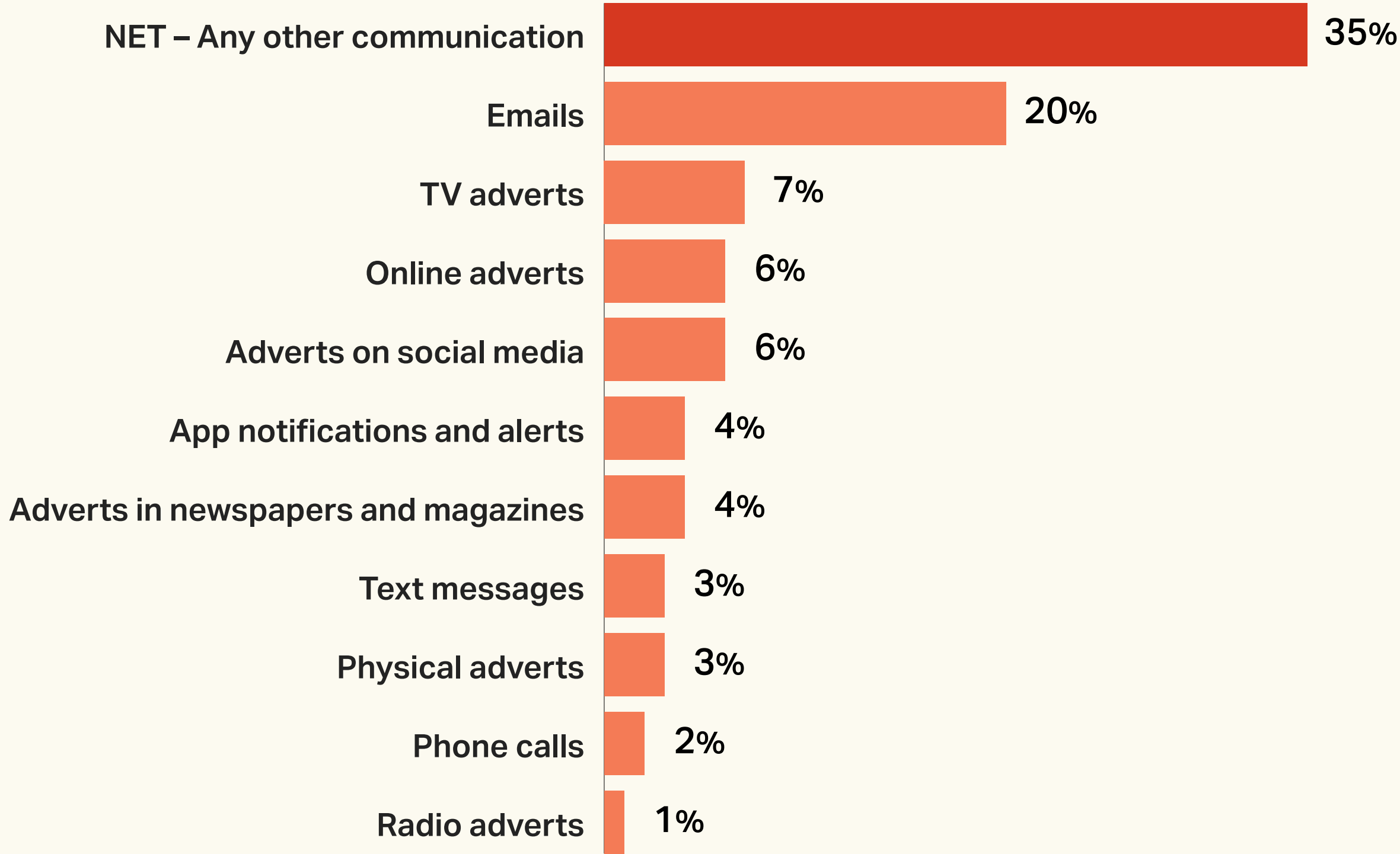
It may be a bitter pill for the industry to swallow, but the public isn’t generally very interested in advertising. The majority of messages are either easily ignored or soon forgotten.

Marketreach’s research found that 65% of respondents who had received a piece of mail could not recall seeing any other form of communication from the brand in question.

At 20%, email marketing was the channel most likely to be recalled. This higher level of cut-through may be because the email contained some degree of relevant personalisation; or it may reflect organisations building awareness and impact by using digital and physical mail in tandem.

No other channel scored above 7%.

Q: Do you receive or see any other forms of communication or advertisements from the sender of this mail?



Base: n=969
Source: Marketreach, Attention Research, Blue Yonder 2023.

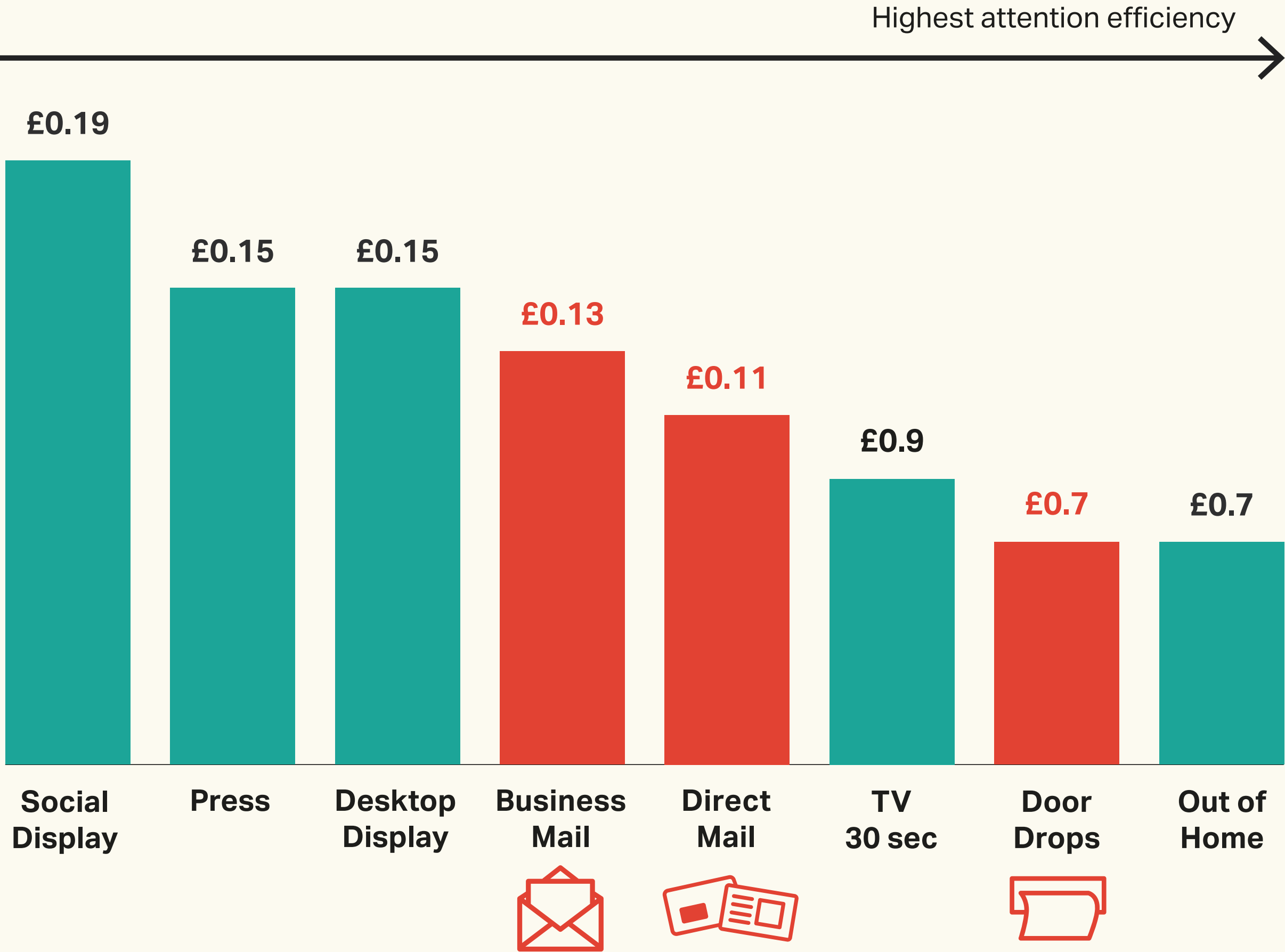
Mail is both effective and efficient at driving attention

As part of its recent 'Attention Study', JICMAIL drew on publicly available data from Lumen and TVision and combined it with standard industry ad rates to calculate the cost of acquiring a minute of consumer attention across different media. Its methodology was scrutinised and validated by PwC.

The analysis shows that mail is one of the most cost-efficient channels for capturing attention.

Direct Mail was found to be over 40% more efficient than a social display ad. Door Drops performed particularly strongly, being nearly 65% more efficient than social display and even bettering 30" TV.

Cost per minute of consumer attention (ABC1 Adults)



Source: The time we spend with mail: A JICMAIL Attention Study (2023). JICMAIL

Expert viewpoints

Mail comes to your door. You go and pick it up. You physically have it in your hand. That's a level of attention that you don't have when viewing a TV ad.

Mail is different and intentional. It has the potential to reach an audience that some of the other channels do not.

Ian Stevens | Chief Investment Officer | Wavemaker UK



There's a combination of senses involved in receiving and opening mail. Scientists call this 'super additivity' which activates multiple brain areas.

Activating more than one sense enhances engagement with a medium. It also enhances the learning from that engagement, memory encoding and recall.

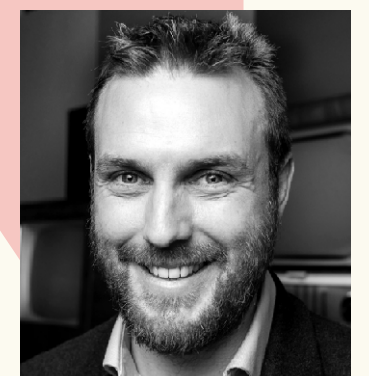
Phil Barden | Managing Director | Decode Marketing



There's no such thing as an absolute minimum amount of attention because ads can work even in a short timeframe.

However, they tend to work better in longer amounts of time. That's certainly true for more complicated messages and more involved decision-making. That can't happen in 1.5 seconds.

Mike Follett | Managing Director | Lumen Research UK



Takeaways

1 New consumer dynamics are emerging, driven by COVID, the ongoing digitalisation of society and the cost-of-living crisis

People are spending a greater percentage of their waking hours at home. Hybrid working in the UK is much more prevalent than the global average.

Digital technologies have elevated consumers' expectations, with brands being judged on their ability to deliver individualised experiences and solutions.

The need to avoid risk is driving preference for trustworthy brands that communicate in authentic styles and formats. All these trends argue in mail's favour.

2 As advertising expenditure rises and the number of media channels proliferates, the problem of attention scarcity continues to grow

Marketers have worried for years about advertising clutter and perceptual overload, and the situation is getting worse.

Their audiences are becoming increasingly adept at blocking out all but the most relevant, compelling or entertaining messages. This is particularly the case in noisy, distraction-rich channels like social or retail media – precisely the environments in which adspend is growing fastest.

3 Research from both JICMAIL and Marketreach proves that mail delivers the attention advantage brands require

Mail commands extremely high dwell-times, from an average of 46 seconds for Door Drops to 150 seconds for Business Mail. These figures compare to averages of 13.8 seconds for a 30" TV spot and 1.6 seconds for infeed Facebook ads.

The channel also provides a high quality of attention, with 63% of recipients saying items attract their undivided focus.

Analysis shows mail is one of the most effective and efficient channels for capturing meaningful media attention.

Chapter 2

Why meaningful media attention matters, and how mail delivers it

Marketing budgets continue to shift towards digital, but the evidence shows many forms of digital advertising attract little or no attention. This is clearly problematic. Without attention, brands cannot build mental availability.

This chapter highlights Marketreach's new findings on 'attention to mail', which demonstrate how strongly the channel performs in capturing attention. Mail provokes both a physical and a mental interaction, stimulating engagement in multiple different ways.



Many digital ad impressions command little or no attention

The surest way for brands to create future demand is to maximise mental availability amongst as many potential category buyers as possible. This is why campaign reach is such an important metric for advertisers.

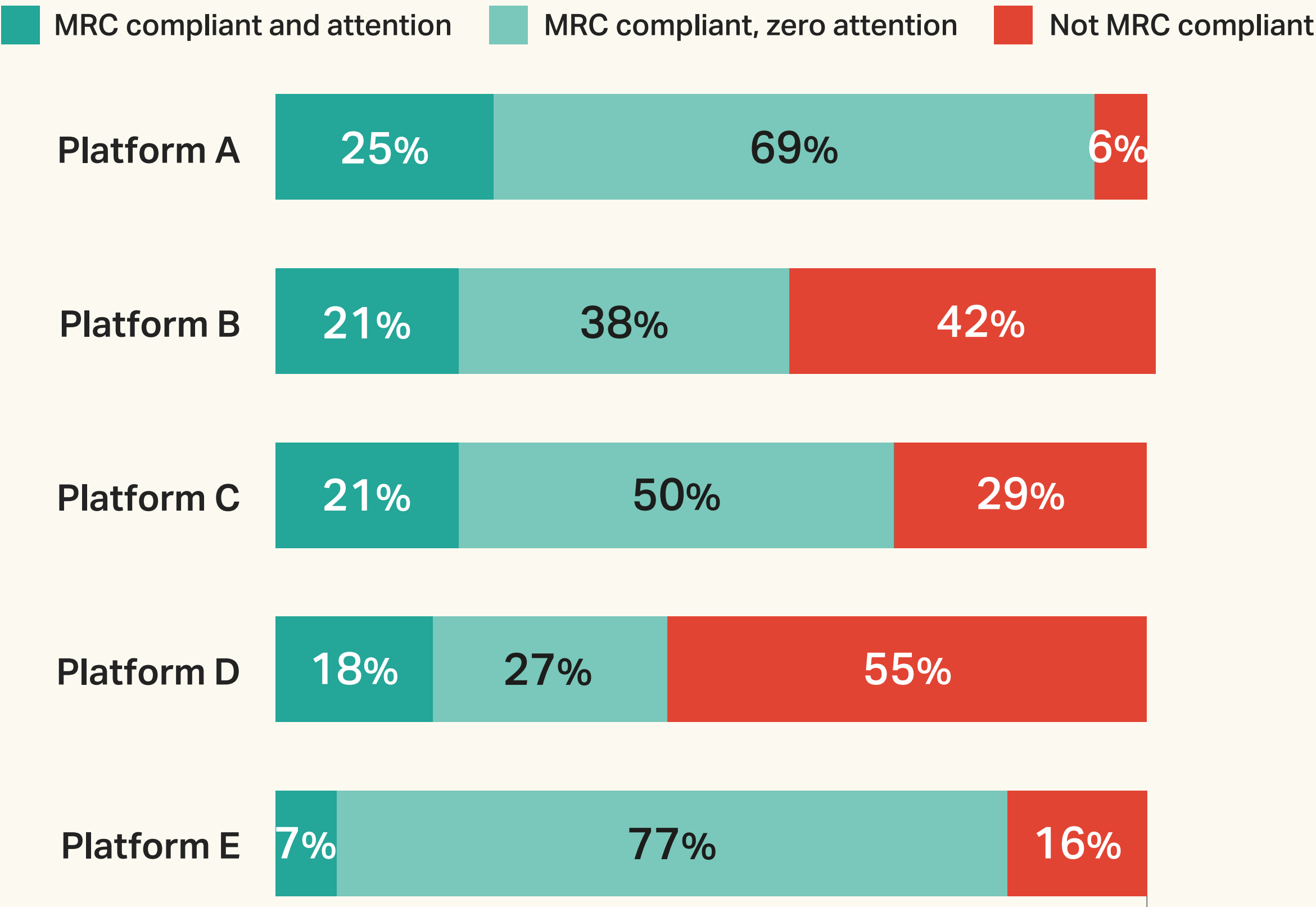
However, it is becoming increasingly apparent that not every point of reach is equally beneficial.

Particularly with digital advertising, ‘viewability’ alone has been shown to be inadequate in evaluating how likely an impression is to increase mental availability.

Amplified Intelligence conducted a test across five anonymised digital platforms. It found no relationship between Media Ratings Council (MRC) compliant ad units, which are favoured by advertisers, and attention.

Reporting the results, Karen Nelson-Field (CEO of Amplified Intelligence) summed up the problem neatly: “You might buy a million impressions and your competitor might buy a million impressions, but the volume of human attention achieved could be very different... 75% of the ads we tested delivered no attention whatsoever.”

How attention differs between digital platforms



Percentages may not total 100 due to rounding

Footnote: The Media Rating Council (MRC) is a not-for-profit industry self regulatory body that audits and accredits media measurement products and data sources across Digital, Out of Home, Print, Radio, Television, and cross-media products.

Source: Amplified Intelligence, [The WARC Guide to cross-media effects](#) | WARC

Audience attention is the lifeblood of brands

There is a growing body of evidence that what drives sales is meaningful media attention. According to research by Dentsu, "attention is a three-times better predictor of positive outcomes, including brand choice, than viewability."

Visual dwell-time is one objective way of measuring the attention an ad receives. The data is most often collected using eye scanning technology (with an adapted method used for audio).

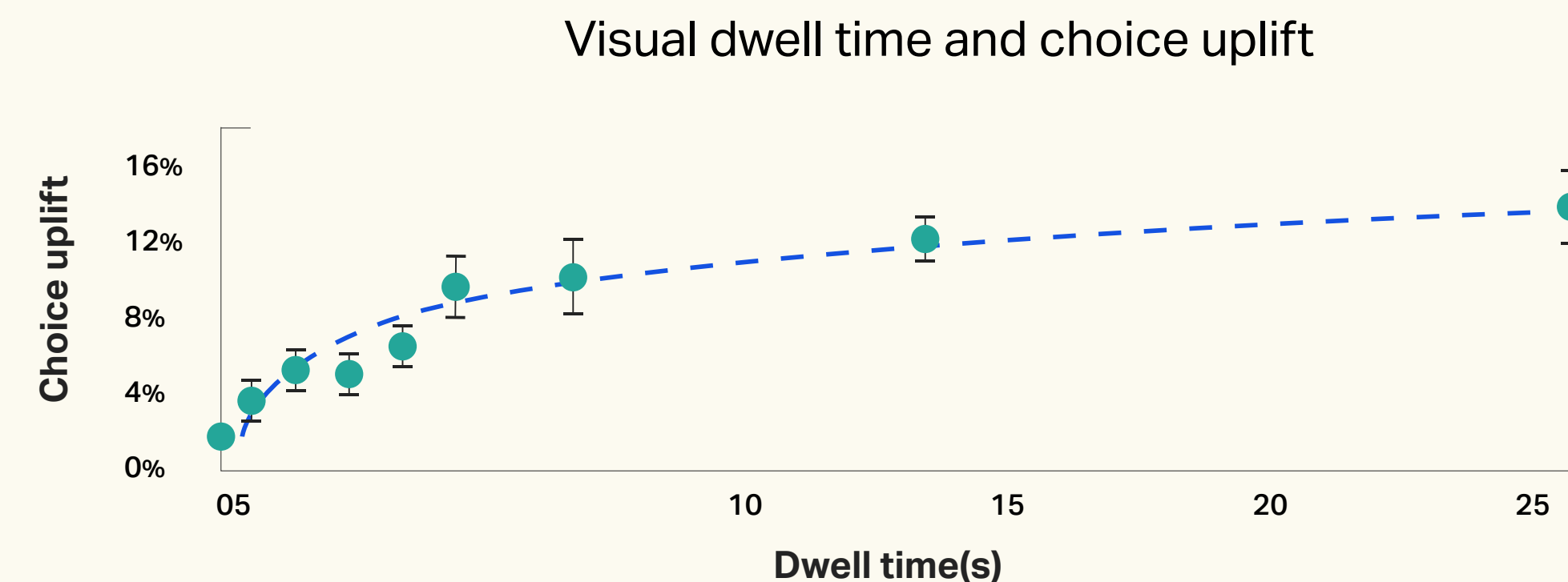
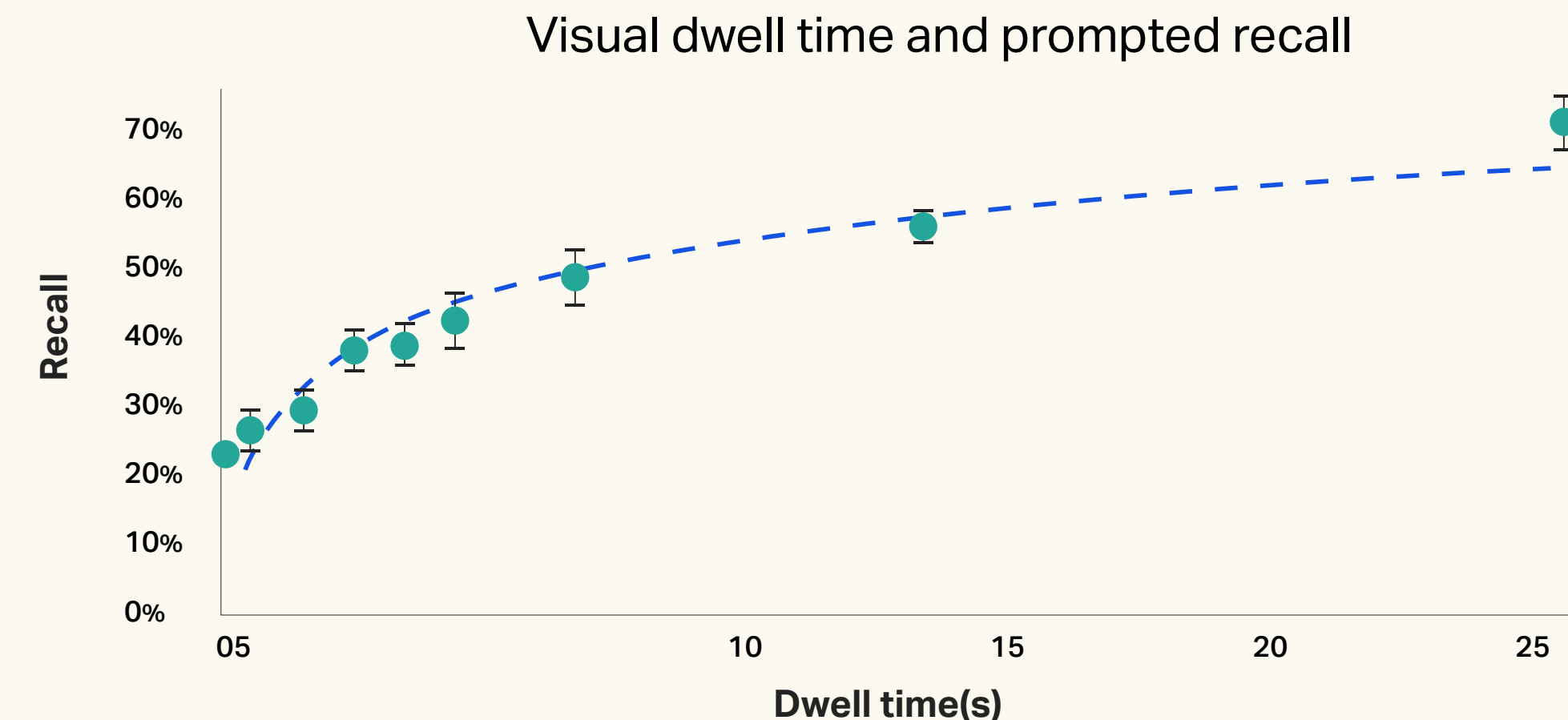
As the graph on the right shows, longer visual dwell-times are positively related to uplifts in prompted recall and brand choice.

In response to these and parallel findings, some marketers are beginning to prioritise 'visibility' over 'viewability'. Visibility takes into account exposure time and visual impact, both of which

can be affected by platform, ad format, sequencing, location and clutter. Generally, visibility tends to be higher in quality advertising contexts.

In a recent A / B test, Coca-Cola found that reallocating budgets to higher attention impressions yielded double-digit uplifts in key brand metrics without increasing spend.⁶

Higher attention times drive superior outcomes



⁶ Coca-Cola taps attention metrics to enhance campaign effectiveness | WARC

Error bars represent standard deviation of the data and the trend line represents a linear regression fit to the data.
Source: Dentsu and Lumen, [Dentsu attention economy project](#) | WARC

Higher attention impressions are more effective throughout the marketing funnel

A recent study by Teads, Lumen and Dynata explored how length of dwell-time affects outcomes across the funnel.

The research compared four sets of proven ad exposure times (collected via the Lumen Attention Measurement Platform’s eye-tracking methodology),

with a control sample. Exposure times ranged from <1 second for the control to 10+ seconds.

The results show a clear correlation between dwell-time and brand uplift.

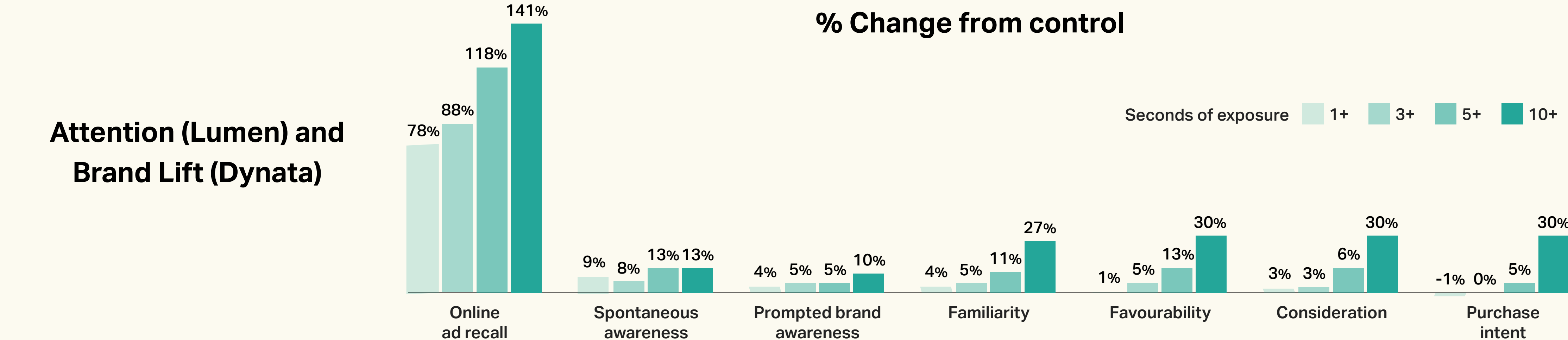
Not surprisingly, the largest percentage differences against the control were

seen in terms of ad recall. Even 1+ second of proven exposure increased recall by 78%. 10+ seconds generated an uplift of 141%.

The more significant findings, however, related to consideration and purchase intent. To move the needle on these critical metrics, proven exposure

needed to be a minimum of 5+ seconds. The most significant wins came with exposure of 10+ seconds.

As we’ve seen, average dwell-times for mail are much higher than 10 seconds. The implication is that the channel is well-equipped to drive significant uplifts across every level of the funnel.



Source: [Unveiling the Connection: Attention & Outcomes, a Brand Lift Meta-Analysis \(2023\)](#). Teads

Expert viewpoints

We're very mindful that all of us exist in an over-communicated world right now.

If you believe customers are seeing between 6,000 and 10,000 different adverts every day, why should ours be the one that they pay attention to?

Lucy Halley | Executive Head of Strategy | Havas CX Helia



If you have an objective around a rational mid-funnel barrier, then attention is very important: for example, if you have specific product barriers or you need to overcome price perceptions.

For higher consideration categories, attention becomes important because people may be looking for specific information.

Geoff de Burca | Joint Chief Strategy Officer | EssenceMediacom UK



People have been talking about emotion and engagement and they lose track of the first hurdle you have to get over.

If you don't pay attention to attention – learn some of the principles by which attention is attracted and directed, what works and what doesn't – you could miss a huge amount.

Phil Barden | Managing Director | Decode Marketing



Mail has a memorability advantage over email and social media

Like mail, digital platforms enable precision targeting. But the evidence suggests some digital channels are not as effective as mail at delivering attention.

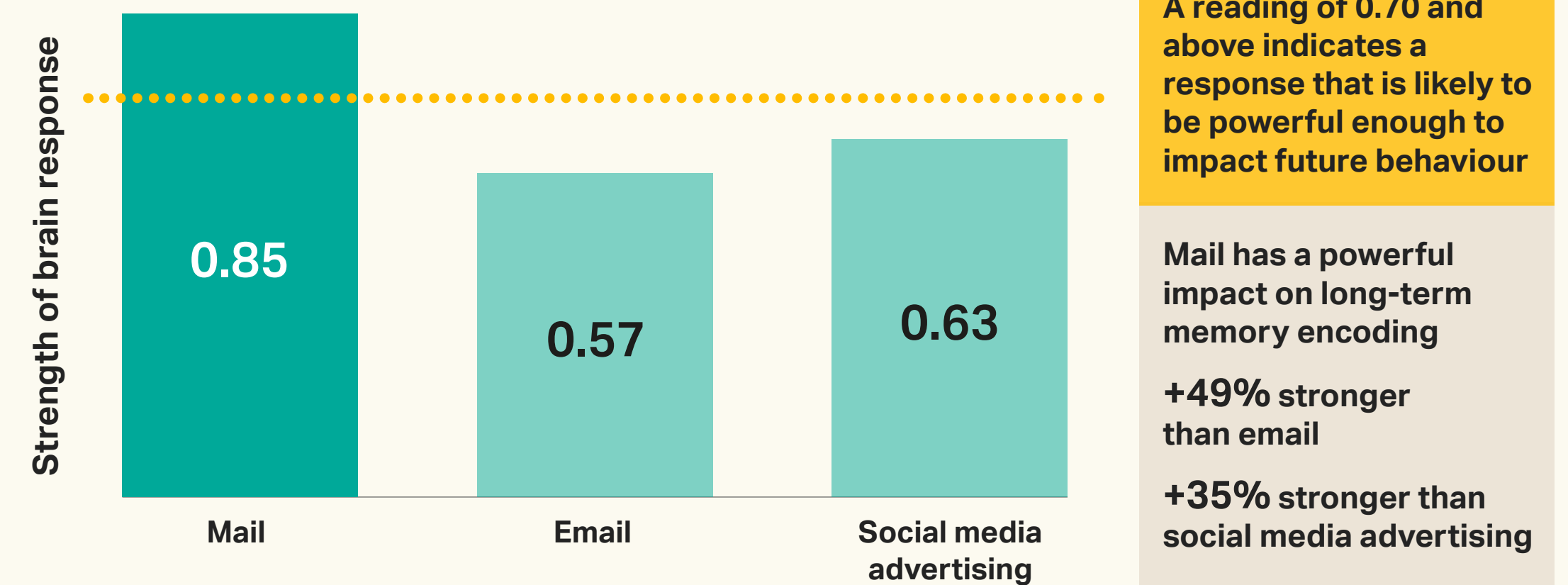
Previous research by Neuro-Insight and Marketreach used neuroscience to measure the subconscious effect of different media channels on consumers. They found that mail performed better than email marketing (+49%) or social media advertising (+35%) at activating those areas of the brain responsible for long-term memory encoding.

The primary reason was mail's ability to create higher levels of engagement. The results revealed mail to be 33% more engaging than email and 35% more engaging than social media advertising.

A parallel study in Canada underlines the point. Their analysis showed that, compared to digital ads, mail requires 21% less effort to understand and creates 70% higher brand recall.⁷

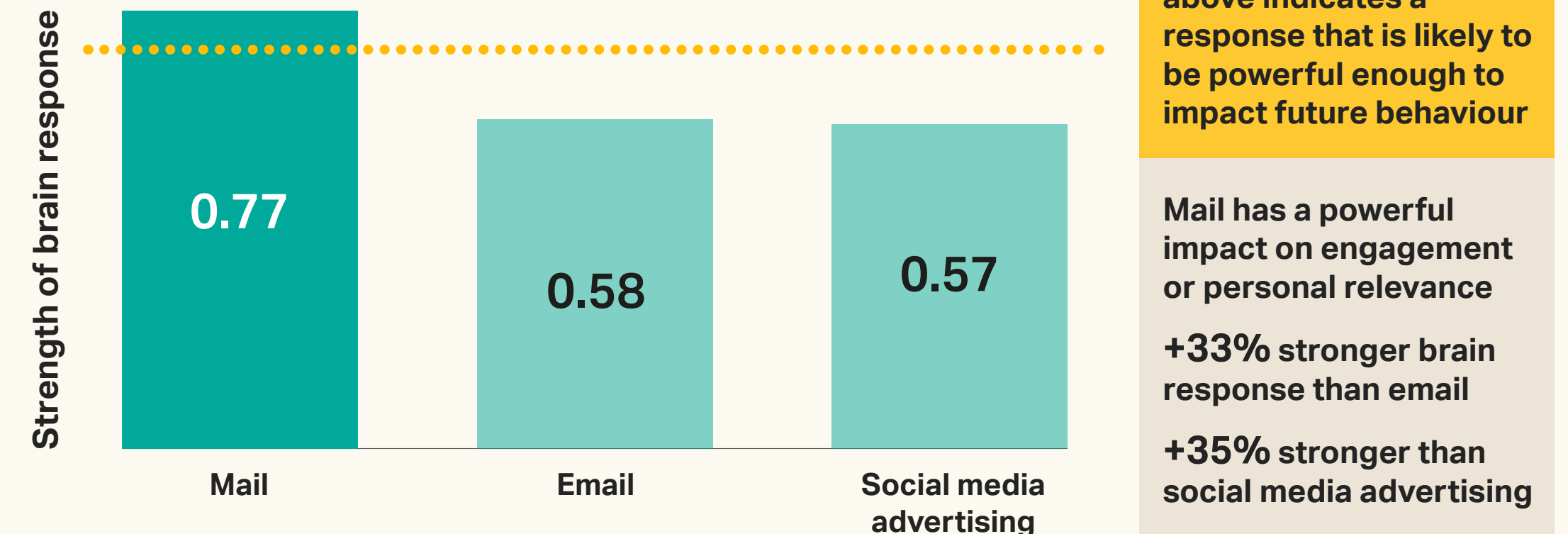
Mail makes a lasting impression

Long-term memory encoding



Mail is engaging

Engagement



⁷ Touch and Go: The activating power of the tangible | WARC

Source: Marketreach, Neuroscience Research, Neuro-Insight 2018

Understanding why mail commands such high levels of attention

To explore why mail outperforms other channels in terms of attention, Marketreach recently commissioned a major independent research programme.

341 people took part across an innovative 3 three stage approach. The sample closely matched JICMAIL's panel in terms of demographics. All findings were then weighted to ensure full comparability.

In total, 1,475 pieces of mail were examined:

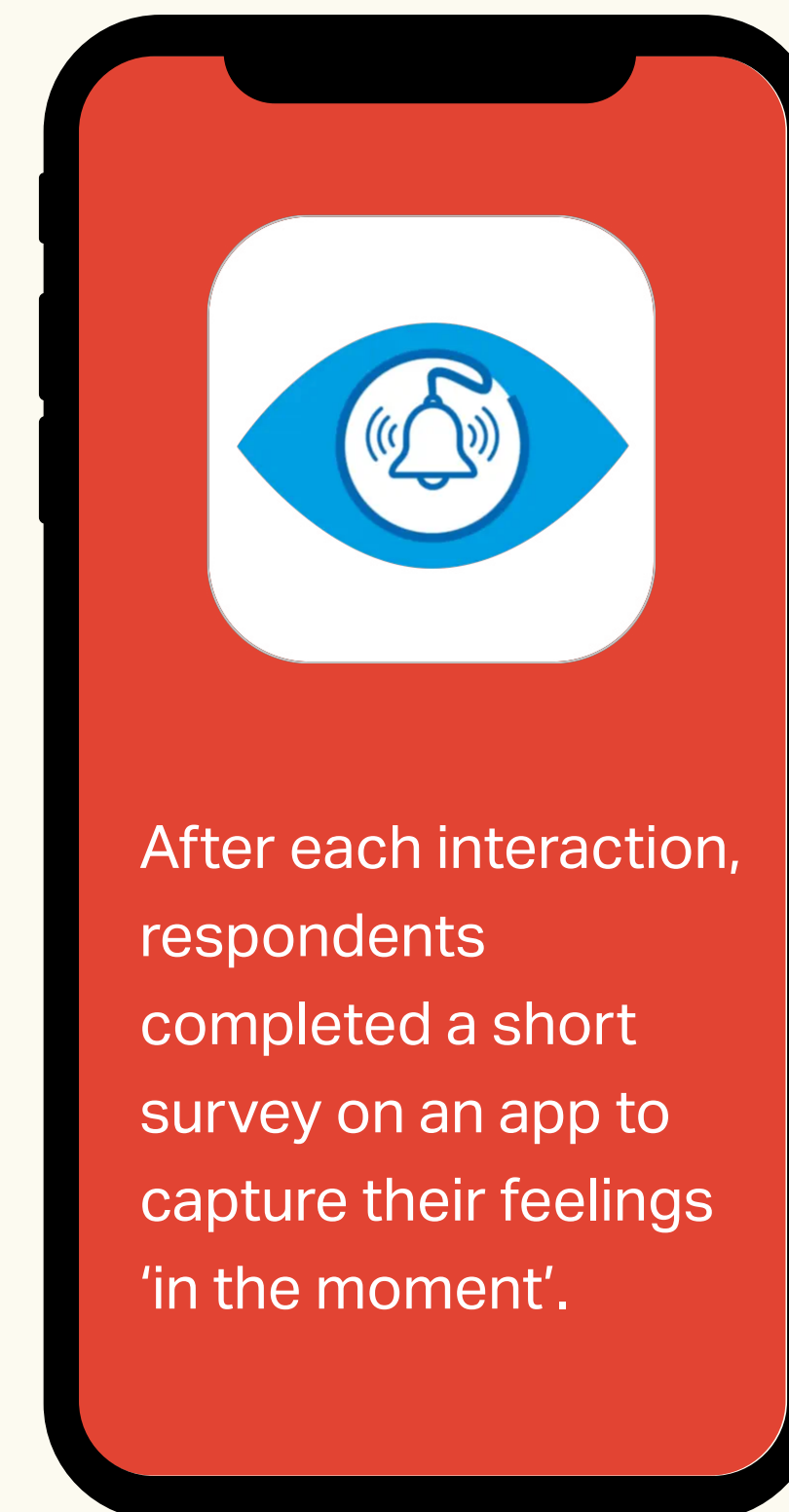
- 752 items of Direct Mail.
- 626 items of Business Mail.
- 228 Door Drops.
- 107 items of Partially Addressed Mail.

The reason these numbers add up to more than 1,475 is that individual items can simultaneously be both Direct Mail and Business Mail, i.e. they include both 'sales' and 'service' messaging. Such items were included in the findings for both mail types.

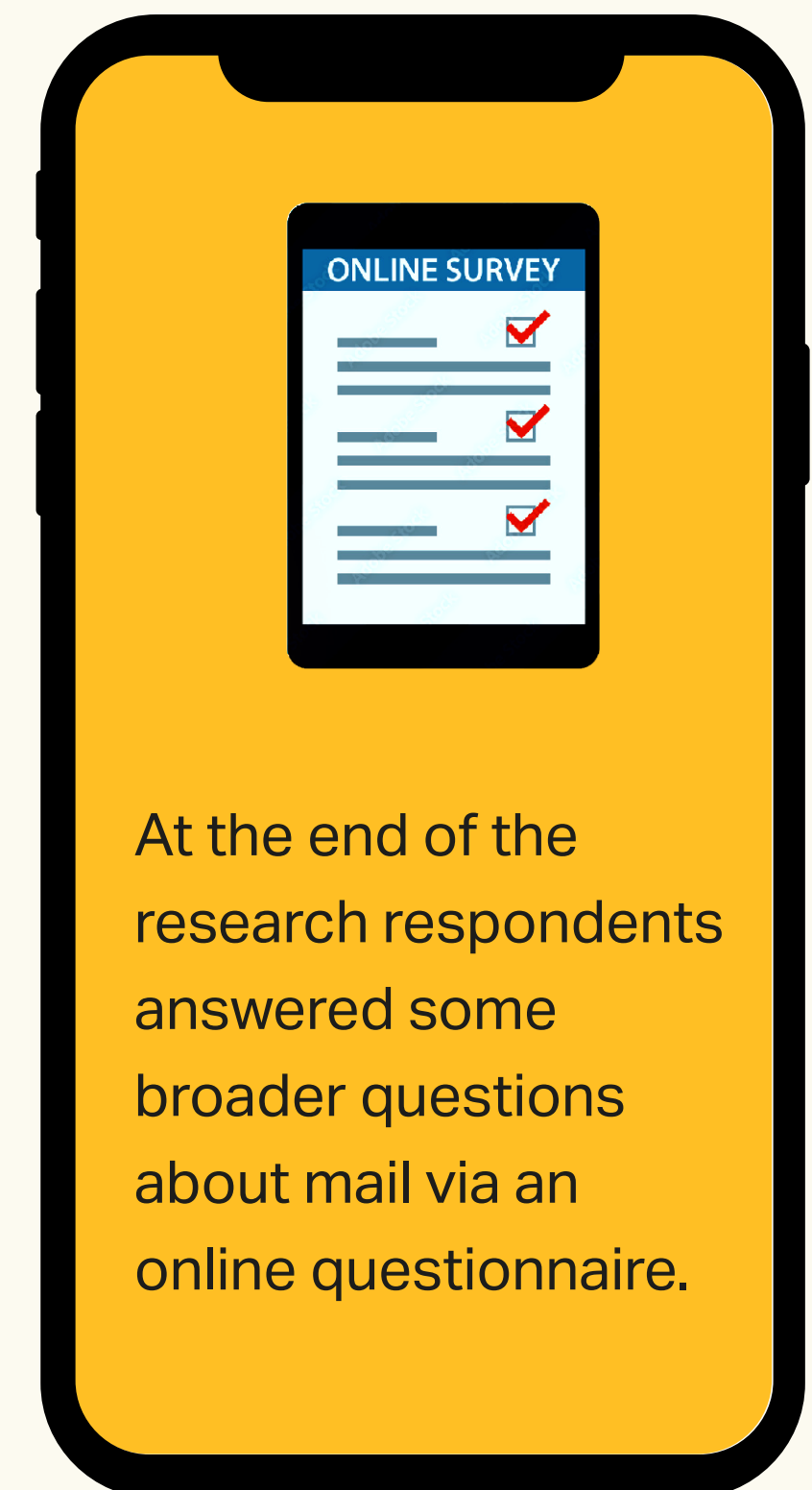
Stage 1 → Stage 2 → Stage 3



Respondents pressed a Clickscape button to record when they started and stopped looking at a piece of mail.



After each interaction, respondents completed a short survey on an app to capture their feelings 'in the moment'.



At the end of the research respondents answered some broader questions about mail via an online questionnaire.

Finding #1:

Strong support for JICMAIL’s ‘time spent’ data





JICMAIL’s attention metrics have provided valuable new benchmarks, demonstrating how all types of mail deliver extremely high dwell-times. JICMAIL now releases the data on a quarterly basis.

In its research, Marketreach was keen to build on JICMAIL’s findings. Rather than use the same diary-based approach, it deployed an innovative methodology.

Clickscape is a Bluetooth-enabled button that allows customers to signal what they are doing “in the moment”. Respondents were asked to click every time they started and stopped looking at a piece of mail, indicating how many seconds they spent on the first and all subsequent interactions.

Over a 7-day period, Marketreach’s research showed higher levels of dwell-time for all mail types. There are several reasons why this might be the case, including the nature of the research task and the variations in the mail mix that naturally happen from one time period to another. However, these seem unlikely to account for the full extent of the differences seen.

WARC’s advice to advertisers and agencies would be to continue using the JICMAIL data for attention planning purposes, safe in the knowledge that actual ‘time spent’ may be even higher.

7-day attention time (seconds)		
	Marketreach June / July 2023	JICMAIL Q2 2023
 Direct Mail	172	88
 Business Mail	169	111
 Partially Addressed Mail	126	59
 Door Drops	111	43

Sources: Marketreach, Attention Research, Blue Yonder 2023. JICMAIL Quarterly Results, Q2 2023

Finding #2:

Virtually all mail stimulates a physical as well as a mental interaction

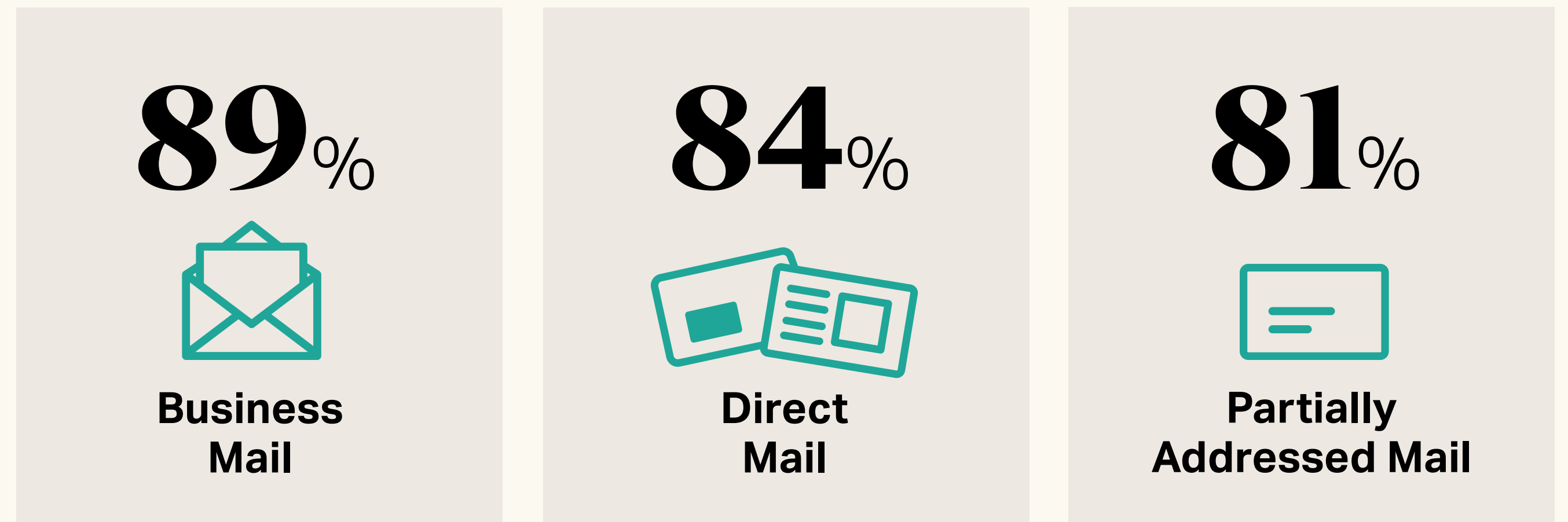
Few brands enjoy email open rates above 30%. Reports vary, but the average across industries is generally accepted to be in the low twenties.

The picture with mail is very different. Since it's considered to contain information of value, practically all items that come in an envelope are opened. And even those that typically don't have an envelope, like Door Drops, will almost always be looked at.

As we said earlier, mail's tangibility is one of its key benefits. Hard to ignore, the channel allows brands – quite literally – to get a message into the audience's hands and provoke a response.

Mike Follett of Lumen Research has an interesting take on this. He describes mail as a 'haptic medium' with innate sensory appeal. Again, this flags how mail can contribute something that's quintessentially different to other parts of the media mix.

% opening on first interaction



Bases: n=626 (Business Mail), 752 (Direct Mail), 107 (Partially Addressed Mail).
Source: Marketreach, Attention Research, Blue Yonder 2023

Finding #3: **58% of mail is retained for future reference**

Whether through locational / demographic targeting or full data-driven personalisation, mail often conveys information of immediate relevance.

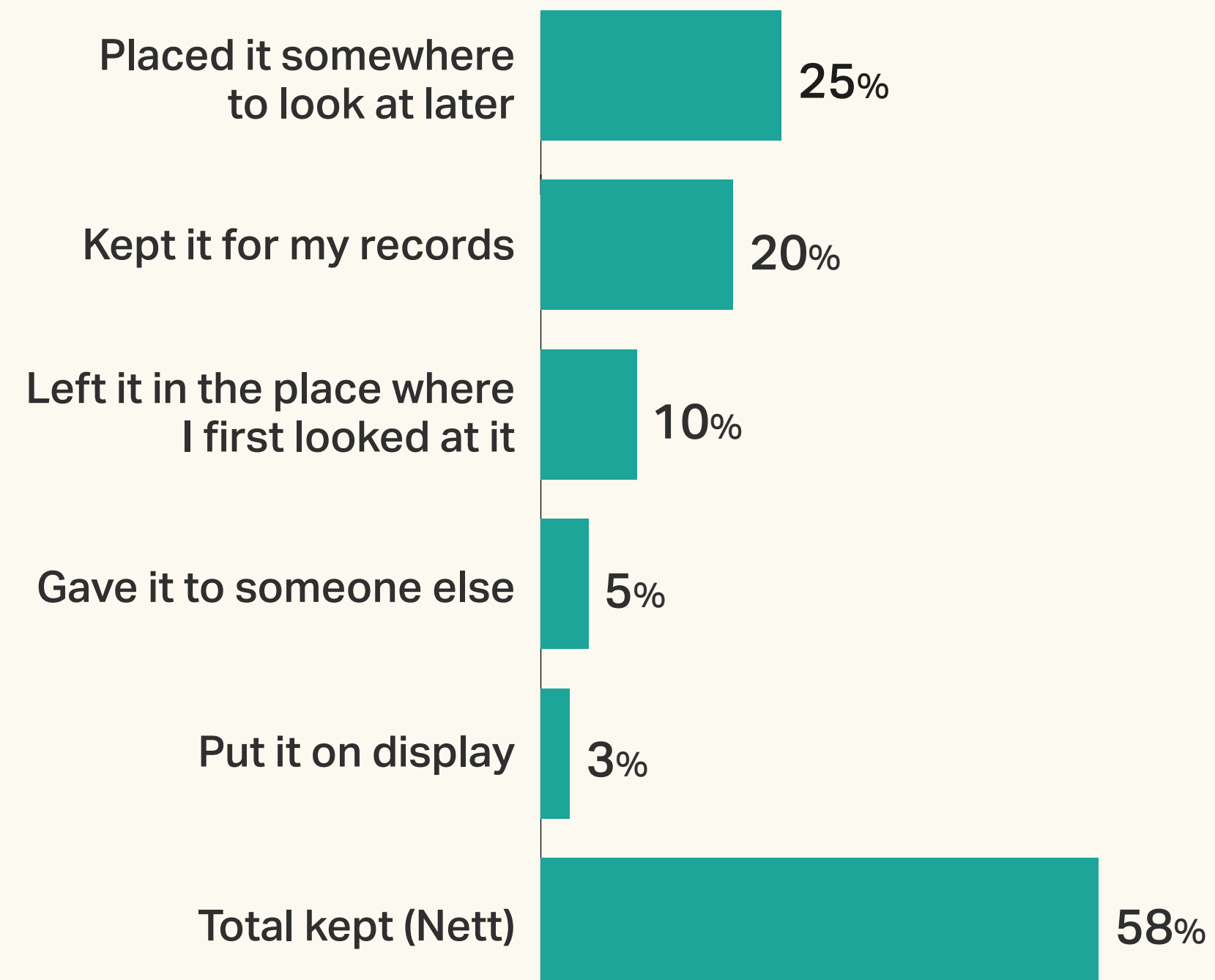
But it has a parallel strength, one that rests on its inherently keepable format.

Mail is often retained to be re-read later, shared with a family member, or simply filed away until the contents will be most useful.

Items are often revisited soon after they arrive at the house. Marketreach's research indicates that the average piece is interacted with twice on average within seven days of receipt, further cementing mail's attention advantage.

These interactions often occur in different rooms. Unlike other media, mail can travel through the home until it reaches the most appropriate destination.

Q: What did you do with the piece of mail after you first looked at it?



Base: n=1475

Source: Marketreach, Attention Research, Blue Yonder 2023.

Finding #4: There are multiple ways in which mail can attract attention

We’ve seen that mail is a high attention channel, but which elements are most likely to drive impact?

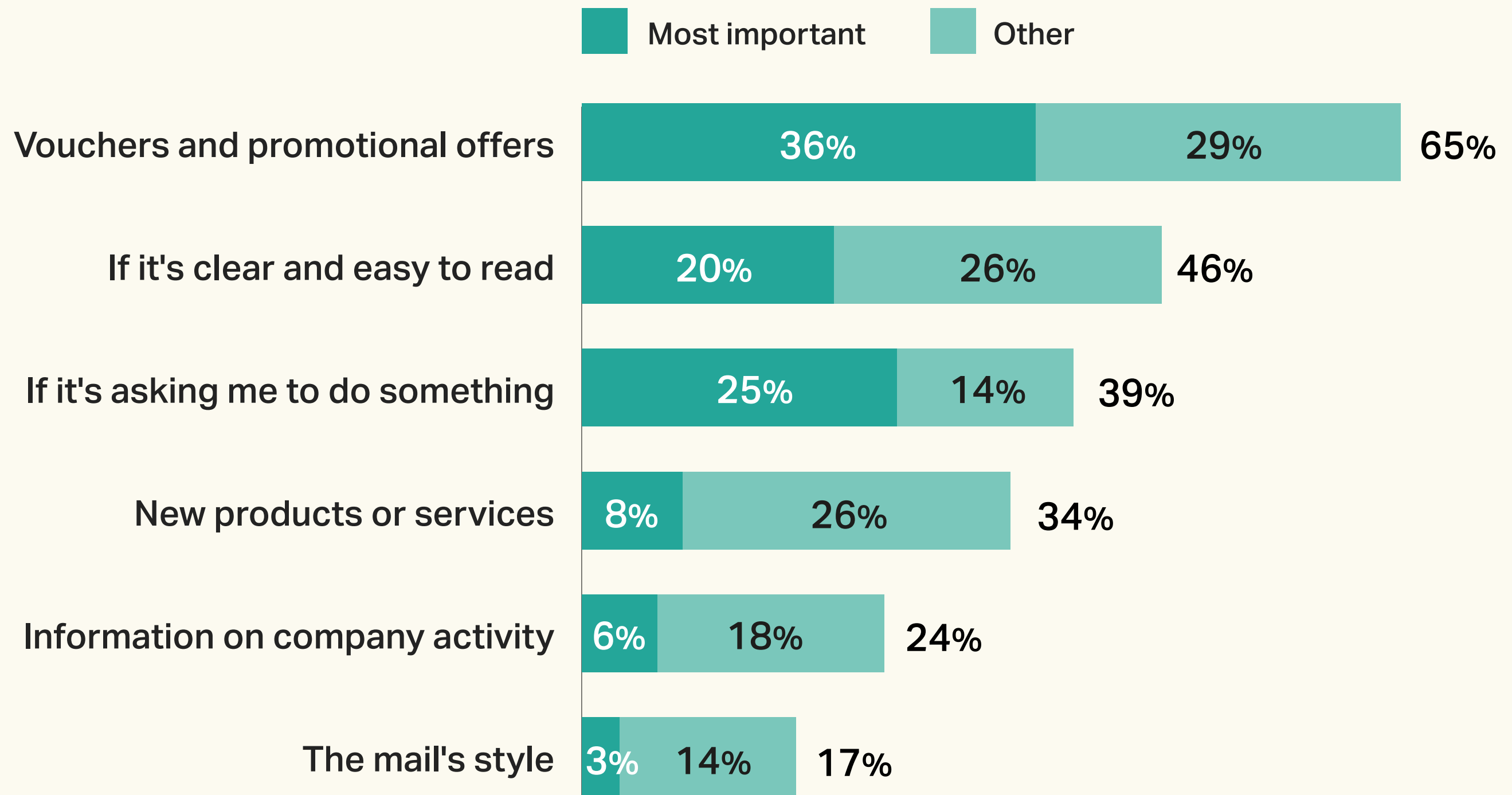
Particularly in the current environment, the power of promotional offers is hardly surprising. Giving people a physical voucher they can put in their wallet is an effective way to keep a brand front-of-mind and incentivise short-term sales.

But consumers are also responsive to other triggers, including:

- Stylistic factors, especially clarity of copy and layout.
- An urgent, hard-to-ignore call-to-action.
- News about a brand’s activities, products and services, especially if recipients feel they’re gaining information that is not yet available to the world at large.

Underpinning all this is the opportunity mail provides for high creativity. With no surrounding clutter or competing ads, the channel is a clean canvas on which brands can explore new and imaginative ways to engage their audience. This potential is accentuated by one of mail’s key points-of-difference: its ability to deliver branding and messaging in a tactile form.

Q: Once you’ve looked at or opened a piece of mail, which of the following elements / features would most likely hold your attention?



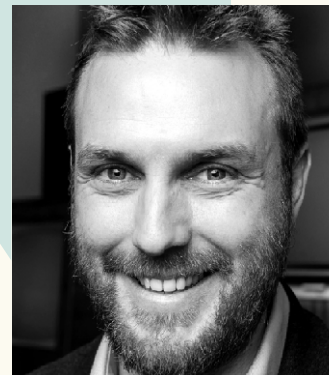
Base: n=328
Source: Marketreach, Attention Research, Blue Yonder 2023

Expert viewpoints

Mail is incredibly diverse. You have 15-second unskippable YouTube ads or half-page newspaper ads, but there's no equivalent with mail.

The world is your oyster. Because of the variety of the medium, you can get four or five times more attention.

Mike Follett | Managing Director | Lumen Research UK



Mail's power to feel valuable physically in our hands is not something to underestimate.

It's interesting that this perspective is true even for younger audiences... they live more of their lives online than older people do, so physical experiences become super important to them.

Lucy Halley | Executive Head of Strategy | Havas CX Helia



So often, communication is intrusive – whether it's a ping as an email comes in or something trying to get our attention and intruding on whatever's going on in our brain at the time.

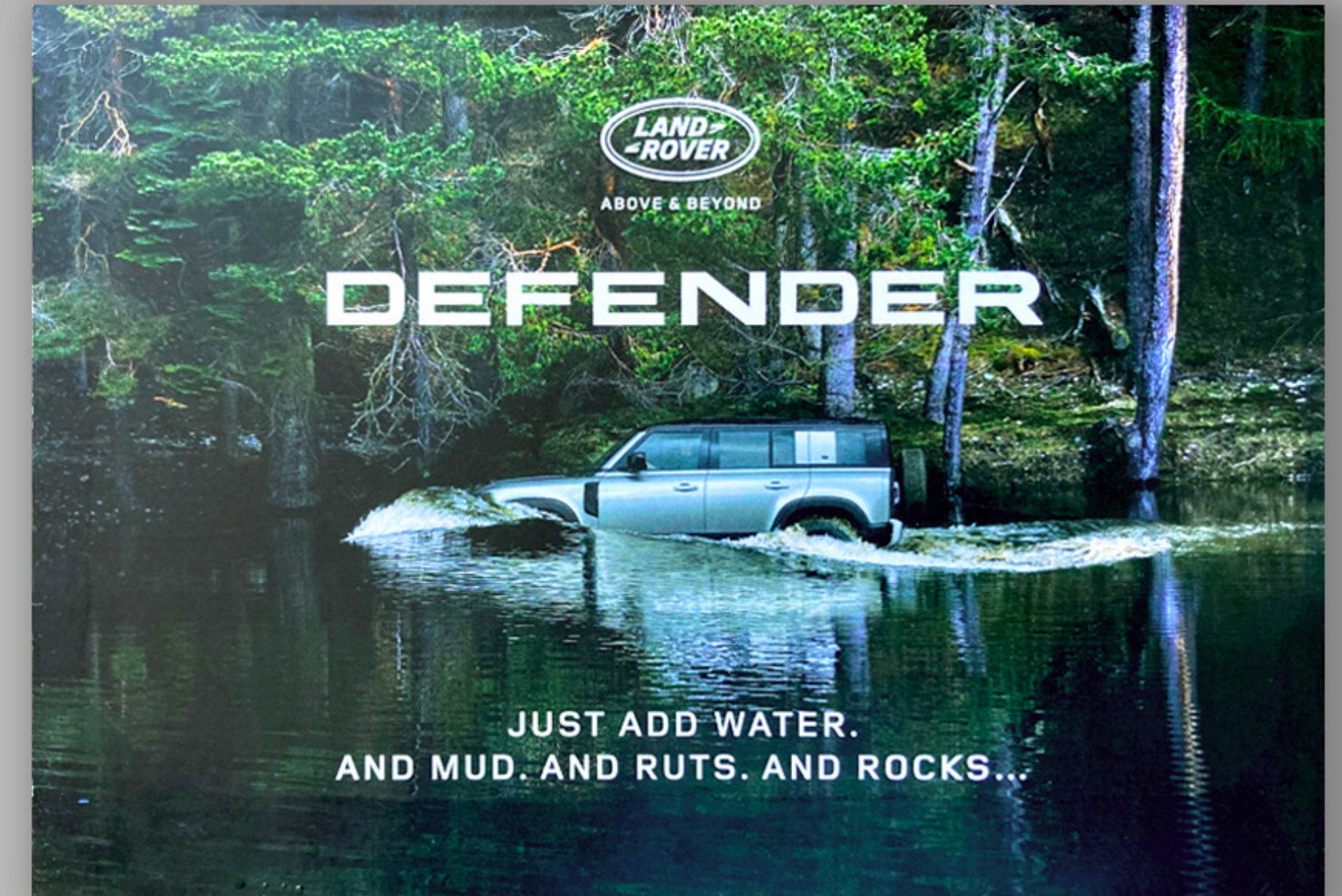
It can be diverting and interesting, but sometimes it can be frustrating and annoying. The thing with mail is that it's already integrated into our daily routine, so the brain is more prepared to receive it.

Phil Barden | Managing Director | Decode Marketing





How mail enabled Land Rover to grab the attention of a sceptical audience



Context:

Land Rover had struggled to produce a model that could replace the iconic LR4 Discovery in drivers' affections. Many felt that the brand was 'going soft'. As a result, owners were tending to hang on to their old vehicle – or worse, defecting to competitors.

The new Defender presented the opportunity to reverse the tide. But Land Rover knew that advertising alone would not overcome owners' scepticism. It needed to persuade them to put the Defender, and themselves, to the test.

Strategy:

To demonstrate the Defender's go-anywhere, do-anything capabilities, the company developed a series of unmissable test drive experiences. It then needed to invite high-potential prospects in an equally unmissable way.

Land Rover turned to mail to dramatise the Defender's credentials in tackling rugged terrain and extreme wet weather. Recipients were challenged to "just add water". Using hydrochromic inks, the mailing revealed an exclusive invitation once run under a tap.

The inclusion of a QR code made it easy for people to book a test drive at one of nine locations around the country.

Results:

- Land Rover's innovative mailing delivered a response rate of 22% at a cost-per-response of £1.88.
- 1,096 prospects booked a test drive. Of these, 147 went on to buy a Defender – well ahead of the company's target of 85 vehicles.

Read the full case study here: [Land Rover 'Water Reactive'](#).

How Cunard used mail to convey luxury and create appetite



WARC

Context:

Queen Anne, the latest addition to Cunard's fleet, is due to take her maiden voyage in May 2024. The ship will set a new benchmark in luxury, grandeur and service.

In an increasingly crowded category, marketing's first task was to create interest and excitement amongst loyal customers.

Strategy:

No other channel is as tactile as mail. Cunard exploited this strength to let its audience enjoy a 'first touch' of the glamorous on-board experience offered by Queen Anne.

Opening a crisp, white envelope, prospects discovered a black presentation box with the brand's distinctive iconography embossed in gold foil. Within it were four teal and gold cards, each showcasing the ship's unique architectural features.

The final item within the box was a 16-page brochure, providing details of forthcoming cruises and instructions on how to book.

Results:

- Cunard's investment in a high-attention mail piece produced rich results.
- As the item began to land on customers' doormats, the company enjoyed its busiest booking day in a decade.
- Berths for the ship's maiden voyage sold out in a day.

Read the full case study here: [Cunard 'Queen Anne'](#).

Takeaways

1 Attention is the lifeblood of brands. There is growing evidence that it is the best predictor of positive commercial outcomes

Research has shown that longer visual dwell-times are positively related to uplifts in prompted recall and brand choice.

Proven exposures of 5+ seconds result in significant gains in both consideration and purchase intent.

Proven exposures of 10+ seconds are even more effective.

Whilst digital advertising provides important benefits, many commonly used formats fail to generate these levels of attention.

2 Mail can deliver the attention that brands need to grow

JICMAIL has provided valuable new benchmarks, demonstrating how all types of mail deliver extremely high dwell-times.

Marketreach has now built on JICMAIL's findings. Using Clickscape, an in-the-moment research methodology, it found that 'time spent with mail' could be even higher than JICMAIL's attention metrics indicate.

3 New research by Marketreach has revealed the reasons mail attracts such high levels of undivided attention

The channel stimulates a physical as well as a mental interaction. Virtually all mail that has an envelope is opened, and this physical engagement drives memory encoding.

Not only is mail hard to ignore when it lands on the doormat, 58% of items are retained for future reference.

Underpinning these advantages is the opportunity mail offers for high creativity. With no adjacent distractions, the "ad is the medium".

Chapter 3

The impact of mail's attention advantage on customer journeys

Attention translates into much more than ad recall. It is critical across every level of the marketing funnel.

This chapter quantifies mail's impact on awareness, consideration, intent and transaction. The findings show the channel delivers substantial uplifts at every stage of the path-to-purchase, with individual types of mail exhibiting different strengths.



Mail can both create and reinforce awareness

As we saw earlier in the Teads, Lumen and Dynata research study, there is a strong correlation between length of exposure and ad recall.

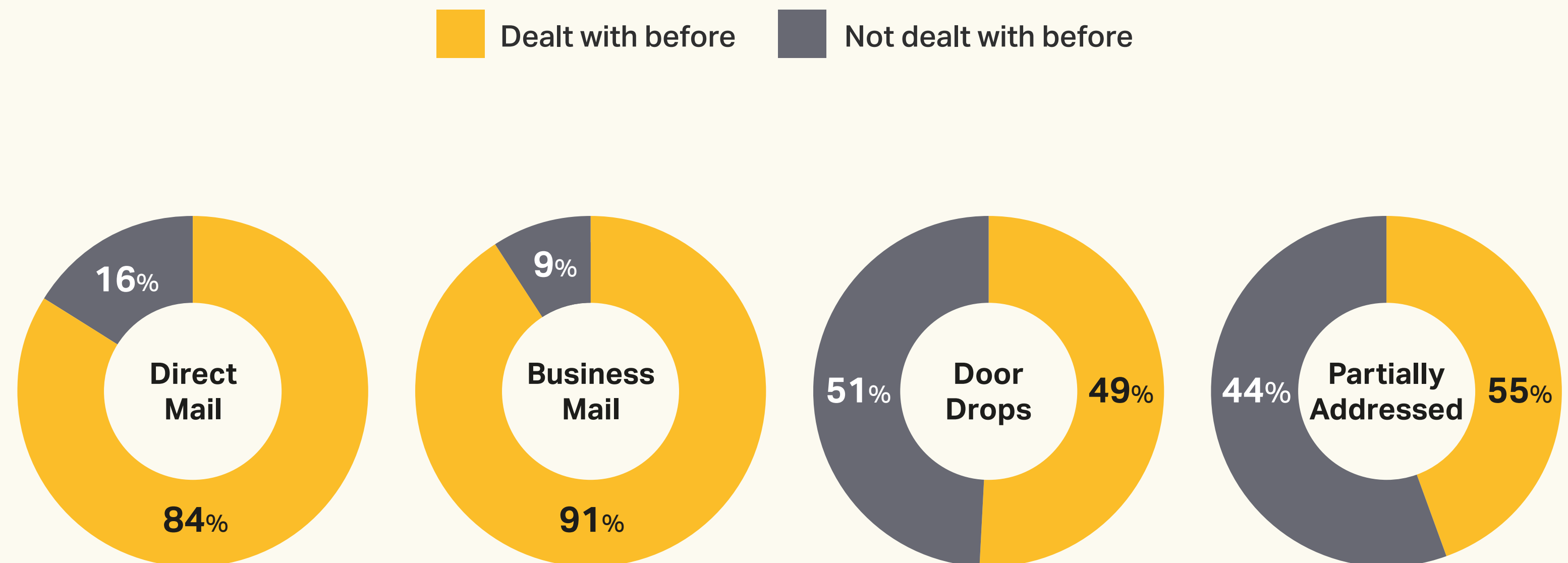
With dwell-times of 45+ seconds, mail can help brands cut through the noise and build awareness. Marketreach's research throws further light on this.

Given their nature, it's unsurprising that Direct Mail and Business Mail typically work to reinforce existing awareness (although with the former, it's also possible for brands to target new prospects by buying cold list data).

With Door Drops and Partially Addressed Mail, the channel's role is more nuanced. Approximately half the recipients in the research claimed to already have some sort of relationship with the sender. But the other half had never dealt with the company before (or at least couldn't remember doing so).

Mail can clearly play a role in introducing consumers to brands for the first time.

Q: Is the piece of mail from a company / organisation that you have dealt with before?



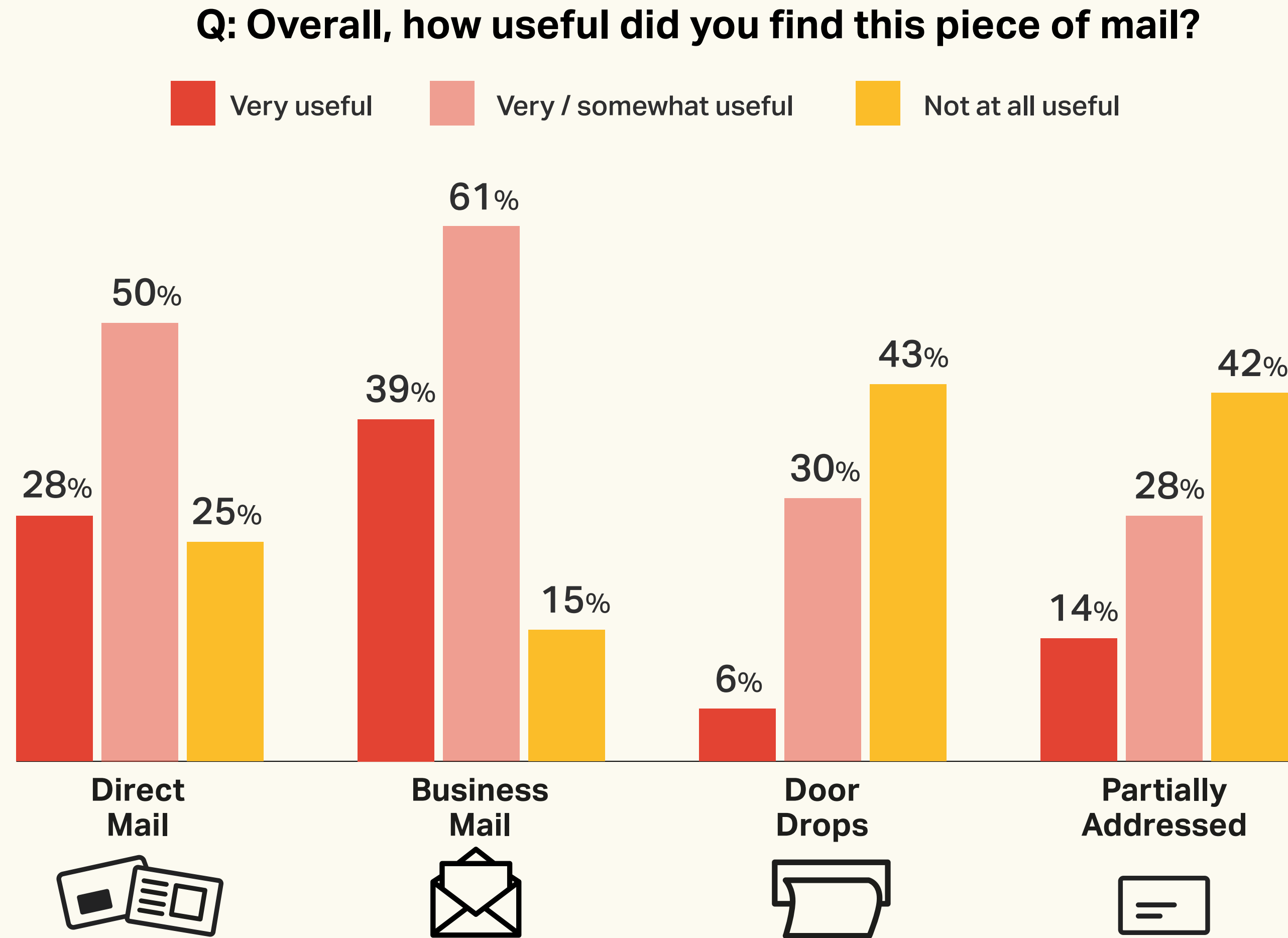
Bases: n= 762 (Direct Mail), 621 (Business Mail), 221 (Door Drops) 104 (Partially Addressed).
Source: Marketreach, Attention Research, Blue Yonder 2023

Mail is seen as useful rather than intrusive

Mail is no different to any other communication channel: it is relevance that determines how the content will be received. If the message is pertinent and timely, it will be welcomed. And, as we've seen, the vast majority of people will open the envelope to find out.

Since it generally includes 'service' messaging, Business Mail is seen as particularly useful. 50% of Direct Mail is also considered useful, even though it is typically more commercial in nature.

Being more broadly targeted, Door Drops and Partially Addressed Mail perform less strongly on this measure. Even so, three out of ten people found the item received to contain information of value.



Base: n= 496 (Direct Mail), n= 371 (Business Mail) 174 (Door Drops) 74* (Partially Addressed).
Source: Marketreach, Attention Research, Blue Yonder 2023
*Please note the sample size here is small

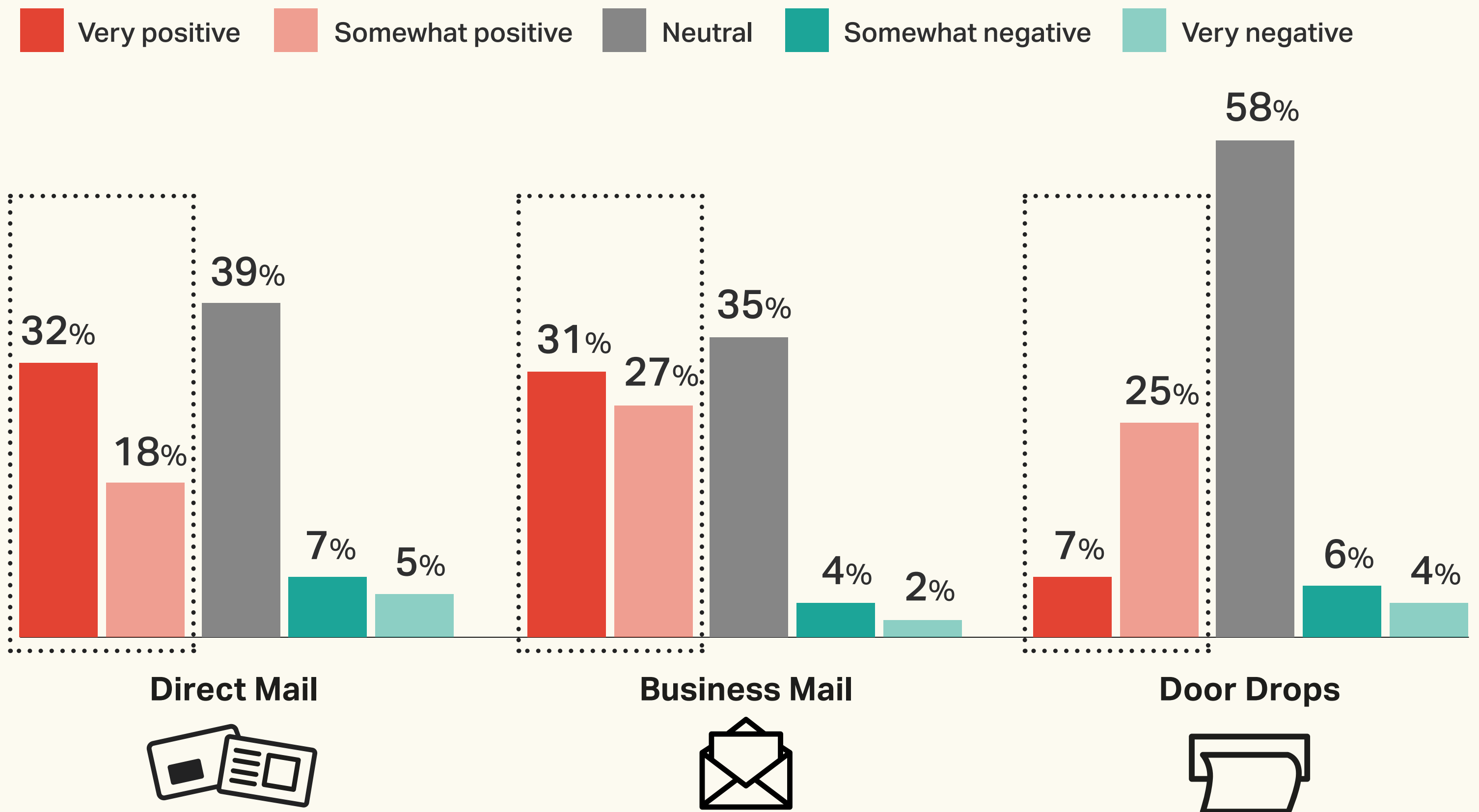
Mail has a positive impact on brand perceptions

Even if the contents aren't seen as immediately useful, mail receives low levels of outright rejection. Only a tiny minority of people say it makes them feel very negative about the sender.

Nearly a third of those getting Direct Mail or Business Mail claim they feel very positive towards the brand sending it. Positive sentiment overall is 50% or higher for both types of mail.

Door Drops get a more neutral response; but even so, 32% say they feel very or somewhat positive towards the company who sent the item. Only 4% say they feel very negative.

Q: Having received this mail item, how do you feel about the company that sent it?



Base: n= 496 (Direct Mail), n= 371 (Business Mail) 174 (Door Drops).
Source: Marketreach, Attention Research, Blue Yonder 2023.

Mail can deliver uplifts across every stage of the funnel

Brands always need to balance long and short-term goals. Future growth requires awareness and consideration. Stimulating intent and providing a drive-to-purchase enables brands to increase their share of current demand. How does mail stack up against these twin imperatives?

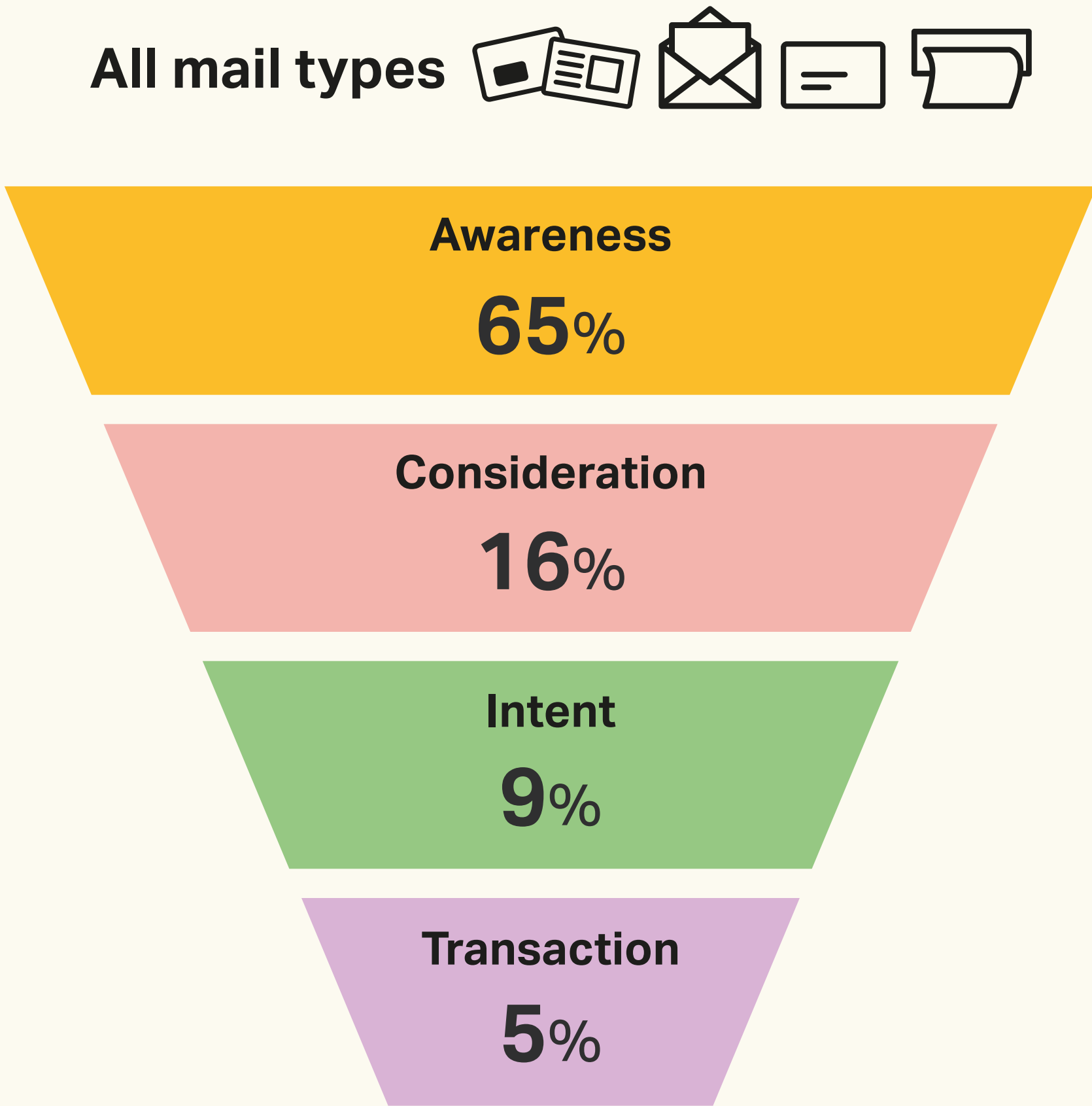
Customer journeys are becoming increasingly less linear, but the marketing funnel remains a useful construct to examine how individual channels contribute across the path-to-purchase.

In analysing 1,475 pieces of mail, Marketreach found that the average item drove 16% of recipients to consider the brand (as measured by actions like 'discussed with someone' or 'went online for more information').

Consideration flowed through into intent. On average, each mail piece led 9% of people to take a purposeful action such as 'planned a purchase' or 'visited a shop'.

As the final link in the chain, each individual item of mail persuaded an average of 5% of people to transact by buying something, using a voucher or discount code, or settling a bill.

To produce the awareness figures shown here and on the next page, Marketreach used the percentage of respondents who could not remember seeing any other form of communication from that brand. The figure is therefore more representative of top-of-mind ad recall than brand awareness per se. However, it's a reasonable proxy.



Awareness base: n=1475 mail items.
% who do not recall receiving any other communication from the brand. Consideration, Intent and Transaction base: n=2013 mail interactions.
Consideration actions: Discussed with someone, Went online for more information, Looked up my account details, Used a tablet or smartphone.
Intent actions: Planned a purchase, Ordered a catalogue / more information, Visited sender's website, Visited sender's shop / office. Transaction actions: Bought something, Made a payment / paid a bill, Used a voucher / discount code.
Source: Marketreach, Attention Research, Blue Yonder 2023

All mail types repeat this pattern

Drilling into the data, the research examined the relative performance of the four different types of mail.

Direct Mail proved the most effective at creating intent. Compared to a 9% average for mail overall, 12% of recipients claimed an item persuaded them to take an action such as 'planned a purchase', 'ordered a catalogue or requested more information', 'visited

the sender's website' or 'visited the sender's shop or office'. This would seem to demonstrate the value of personalisation: heightened relevance drives intent.

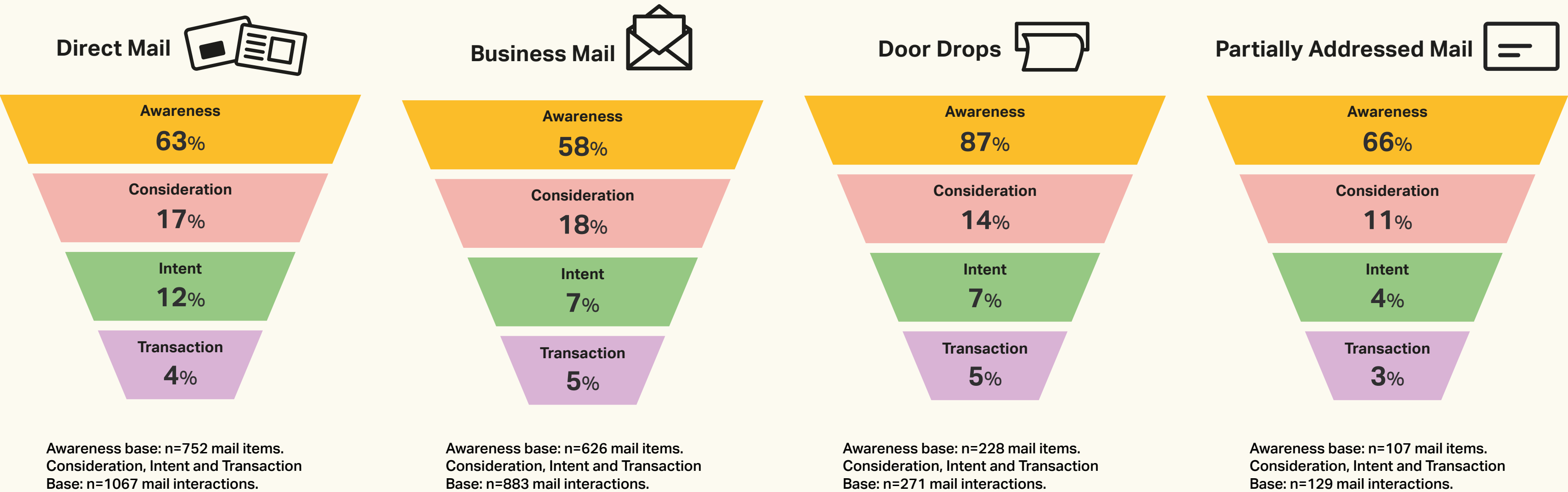
Business Mail delivered the strongest level of consideration, reflecting the fact that it usually contains information of high personal importance. It also led 5% of people to transact. In the

majority of cases, this will have been paying a bill such as a credit card. But Business Mail can also include sales messaging, and the high consideration score underlines its potential to stimulate 'new' purchases and extend a customer's relationship with the brand.

Door Drops scored notably well in terms of awareness (in the sense that they were the only form of

communication from the brand that the recipient could recall). Often offer-based, Door Drops also proved effective at driving transaction.

Partially Addressed Mail also performed creditably, especially given the relative affordability of this mail type.



Definitions:

Awareness: % who do not recall receiving any other communication from the brand.

Consideration actions: Discussed with someone, Went online for more information, Looked up my account details, Used a tablet or smartphone.

Intent actions: Planned a purchase, Ordered a catalogue / more information, Visited sender's website, Visited sender's shop / office.

Transaction actions: Bought something, Made a payment / paid a bill, Used a voucher / discount code.

Source: Marketreach, Attention Research, Blue Yonder 2023

How important is brand familiarity?

Mail can be a powerful way to introduce consumers to a brand, but the evidence suggests it's most effective when people already have dealings with a company in some shape or form. The channel appears to be an

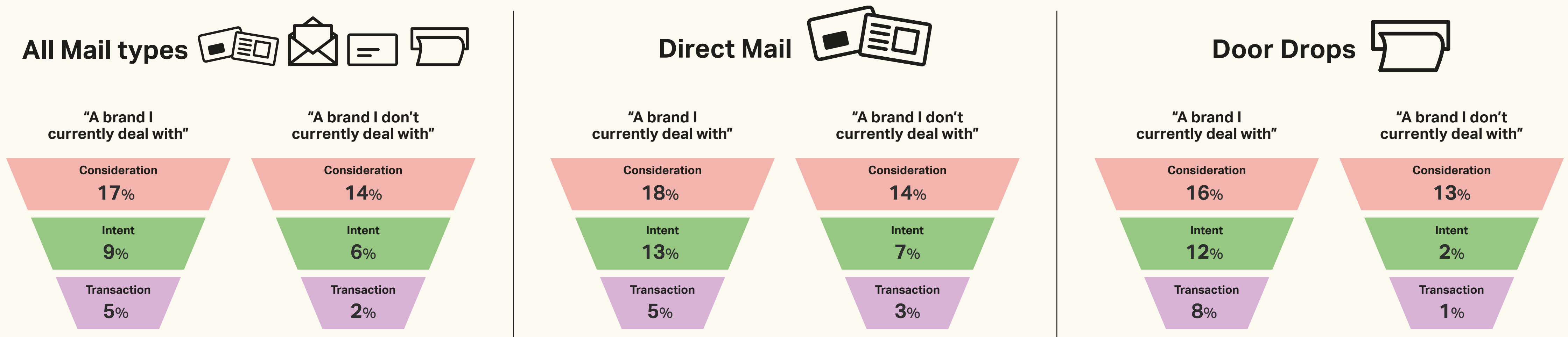
effective means of nudging people back into action, whether that's by re-awakening consideration, stimulating intent or driving transaction.

Marketreach found this applied across the board. Perhaps surprisingly, it

seemed to be particularly true for Door Drops.

This type of mail can spark consideration whether there is an existing relationship or not. However, its impact towards the bottom of the funnel is significantly magnified if the

recipient already has dealings with the brand; it's one reason why companies like Domino's and Specsavers use Door Drops to target the same audience multiple times. High frequency enables them to win consideration from non-users, whilst also triggering additional transactions from existing customers.



Bases: n= All Mail types 1625 / 360. Direct Mail 901 / 154. Door Drops 136 / 126.
Source: Marketreach, Attention Research, Blue Yonder 2023

How Sky created the simplest mailing imaginable to drive consideration



Context:

A sizeable proportion of Sky's potential audience believes its products are complicated and expensive.

To target this segment, the company created Sky Essentials: a more affordable, stripped-down bundle that included broadband, calls, a Sky box and access to Freeview channels.

While Sky was confident Essentials provided excellent value-for-money, the brand was finding it hard to gain consideration.

Strategy:

There are many innovative ways to use mail; but its strengths in terms of simplicity and directness can sometimes be under-appreciated.

Reflecting the 'no frills' nature of Essentials, Sky set out to create the simplest mailing possible. Everything people needed to know was printed on the outside of the envelope, with the package's key benefits and pricing outlined clearly and succinctly.

It was the perfect item to be shared among family members, sparking conversation and interest.

Results:

- Sky's approach shows that simplicity can sell.
- The mailing generated a response rate 44% higher than the average for previous campaigns.
- Cost per acquisition was 57% lower than Sky's average CPA for mail.

Read the full case study here: [Sky-essentials-direct-mail-campaign](#)

How SunLife used ‘smelly mail’ to turn interest into intent



Context:

All insurance companies suffer from the same problem: a high number of online enquiries that are never followed through. SunLife Pet Insurance is no exception.

Clearly, these enquirers have a need. Equally clearly, they've included SunLife in their consideration set. The challenge for the brand was to find ways to nudge them further down the funnel.

Strategy:

SunLife came up with an interesting concept: enlist pets to do the sales job on its behalf. Mail was the ideal channel to bring this idea to life.

The brand created 'smelly mailpacks' that pets – and therefore their owners – would find unignorable. After testing, peppermint emerged as the most stimulating scent for cats. For dogs, bacon proved the winning aroma.

Insurers need to get to prospects before they buy elsewhere, so speed is of the essence. SunLife was already set up for success. Digital print meant the brand could produce and send fully personalised mailings within days whenever it received an unfulfilled enquiry.

Results:

- For the marketers at SunLife, the results smelt sweet.
- The campaign saw a response rate of 7%, nearly double the target. ROI was an impressive 3.8:1.
- Just as importantly, the average premium paid was 11% higher than expected. Relative to those acquired through aggregator sites, a higher percentage of customers chose to upgrade to the Gold or Silver packages.

Read the full case study here: [SunLife Pet Insurance 'Smelly Pack'](#).

How a playful mailing helped IKEA increase footfall and sales



Context:

In early 2022, with household bills rising fast and COVID still fresh in the nation's memory, IKEA UK saw in-store traffic decline sharply.

The retailer needed to plug a £1m sales gap but was determined not to default to simple price discounting. Rather, it wanted a solution that would strengthen the brand's reputation for playfulness.

Strategy:

On average, members of IKEA's loyalty programme spend 24% more than non-members. Given their addressability and proven interest in the brand, these Family Members were quickly identified as the priority target.

IKEA then asked itself two questions. How could it combat its customers' rising levels of stress by bringing them a moment of playfulness? And how could it do so in a way that would also maximise response? The solution was a dot-to-dot mailer.

By resolving the puzzle, recipients revealed a threshold discount: "spend £50 in-store and get £5 off".

Results:

- In just three weeks, 14,000 Family Members redeemed their voucher.
- This translated to over £1.6m in sales at an average of £116 per customer – well ahead of the £50 threshold.
- Just as importantly, IKEA proved that mail cannot only stimulate transaction. It can also reinforce brand equity.

Read the full case study here: [IKEA 'Join The Dots'](#).

How Specsavers' Audiologists deploy mail across the customer journey



Context:

Accepting hearing loss is an emotional journey. People often wait seven years or longer before addressing the issue. Even then, 73% of those who visit an audiologist and are diagnosed with hearing loss will put off buying a hearing aid for another day.

Specsavers knew that mail could intercept people at different stages on this journey and encourage them to take positive action.

Strategy:

When dealing with such a sensitive subject, empathy is crucial. Humour is also an effective way to counter people’s natural resistance.

Specsavers uses Door Drops to raise awareness of both the problem of hearing loss and its Audiology service. High need areas are pinpointed using a combination of historical customer data and regional profiling.

In parallel, the brand utilises Direct Mail to target individuals who have taken a hearing test but failed to buy an aid.

Creatively, the brand’s approach is characterised by a light-hearted but informative tone.

Results:

- Econometrics have shown that mail consistently delivers superior ROI than TV or OOH.
- Analysis by Whistl found Door Drops delivered a 16% uplift in appointments versus control areas.
- While mail’s specific contribution was not isolated, the campaign overall led to a 15% improvement in brand consideration and a 10% rise in purchase intent.

Read the full case studies [here](#) and [here](#).

Expert viewpoints

I think mail has a 100% role in marketing.

Depending on the brief, you can expect some very strong results if it's done in the right way and it's delivering something that's interesting and valuable to the user.

Ian Stevens | Chief Investment Officer | Wavemaker UK



Mail works by being the most seductive and voluntary medium of them all.

It's a wonderful storytelling opportunity, but it also provides a resource for people to return to for help with more rational decisions.

Mike Follett | Managing Director | Lumen Research UK



Where Direct Mail can come into its own is when you're trying to change perceptions.

Think of those instances where we're trying to overcome barriers in the middle of the funnel, or convert to a sale at the lower end of the funnel.

Geoff de Burca | Joint Chief Strategy Officer |
EssenceMediacom UK



Takeaways

1 Mail is seen as useful rather than intrusive, and typically has a positive impact on brand perceptions

As with advertising in any medium, relevance is critical to success. Mail that includes pertinent and timely content is welcomed into the home.

61% of people find Business Mail useful. For Direct Mail, the figure is 50%. Sentiment towards the channel overall is warm.

The percentage of recipients feeling positive towards the sender of an item vastly outweighs those feeling negative.

2 Given the strong correlation between length of exposure and ad recall, mail can both create and reinforce awareness

With dwell-times of at least 45 seconds, mail can help brands cut through the noise and build awareness.

Direct Mail and Business Mail are particularly effective at deepening awareness. Well over 80% of recipients recognise that the item has come from a company they already deal with.

But the channel can also introduce consumers to brands for the first time. Half of those receiving a Door Drop or a piece of Partially Addressed Mail have had no prior dealings with the brand.

3 Mail can deliver strong uplifts across every level of the marketing funnel

Mail's impact goes well beyond awareness.

Analysis by WARC and Marketreach shows that the average item drives 16% of recipients to consider the brand (as measured by actions like 'went online for more information').

Increased consideration translates into intent and transaction. On average, each mail piece leads 9% of people to take a purposeful action such as 'visited a shop or website'.

It also persuades 5% of consumers to buy something, redeem a voucher or settle a bill.

Chapter 4

Leveraging attention to mail: Six recommended actions for brands

High dwell-times make mail an effective solution to the problem of attention scarcity. But for the best results, it needs to be incorporated into the communications strategy and media mix in the right way.

This chapter covers six actions – from testing the impact of greater 'share of doormat' to driving interaction via the inclusion of digital technologies – that will help marketers realise the channel's full potential.



Is mail's contribution to the media mix undervalued?

As meaningful media attention becomes increasingly scarce, high dwell-times present a strong argument in mail's favour. However, the channel's share of UK adspend is in gradual decline.

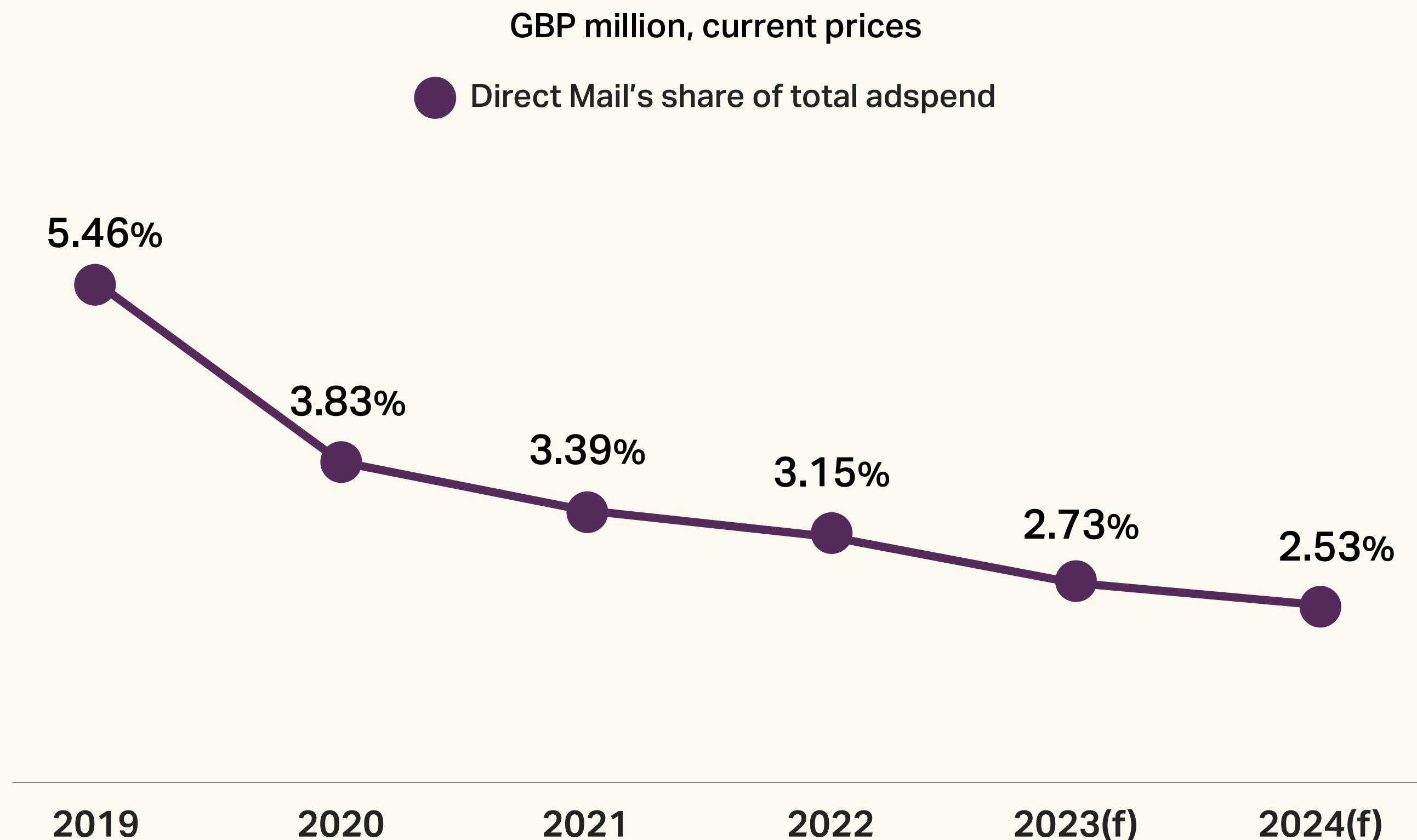
It seems counter-intuitive given we were all confined to home, but COVID hit investment levels hard as print and logistics services struggled to cope. Mail's share of media spend was 5.5% in 2019. A year later, it had dropped to 3.8%.

Much of this money shifted to digital. While digital advertising provides many important benefits, most impressions do not deliver high levels of attention. In one test, Amplified Intelligence found that: "85% of 130,000 digital ad views researched didn't achieve the 2.5 seconds or more of active attention necessary to impact brand memories and so help build mental availability."⁸

Every medium has a role to play in the marketing mix, but this attention deficit needs addressing. Mail is one way in which advertisers and agencies might seek to do so.

Following are six actions that will help brands to capitalise on the channel's intrinsic strengths and generate positive commercial outcomes.

United Kingdom, Direct Mail advertising spend



⁸ Attention's the problem, creativity's the answer – as ever (marketingweek.com)

Source: United Kingdom, Direct Mail advertising spend (annual) | WARC

Action #1:

Test whether greater ‘share of doormat’ leads to greater share of market

Regardless of channel, increases in a brand’s share of voice generally lead to positive gains. The benefits are significantly magnified when additional spend is focused towards high-attention channels like mail.

Brittain Consulting has quantified the impact. It found that increasing spend on high-attention platforms resulted in brands seeing, on average, a 135% uplift in the number of very large business effects from a campaign; more than double what they could expect from spending more on low-attention platforms.⁹

Given that investment levels in mail have been in gradual decline, securing a greater share of customers’ and prospects’ doormats may prove a strategy that is both affordable and commercially effective.

Increasing spend on low-attention platforms yields an average 64% uptick in the typical number of very large business effects, from 1.1 to 1.8.

[But] directing additional spend towards high-attention platforms generates a 135% spike in the average number of very large business effects, from 1.1 to 2.6.

Rob Brittain | Rob Brittain Consulting



⁹ How attention and emotion combine to drive effectiveness | WARC | The Feed

Action #2:

Re-evaluate what mail can add to the mix

Multi-media planning has always been fundamental to campaign success. It’s becoming even more so as platforms proliferate and fragment. In order to reach the right people with the right message at the right time, integration across channels is now non-negotiable.

As part of its large-scale “How Advertising Works” programme, the Advertising Research Foundation found that going from one platform to two increases marketing ROI by 19%. Returns grow further as more channels are added. When brands invest in five platforms, they can expect to see an average boost in ROI of over 35%.¹⁰

Lying behind this is the fact that more platforms almost always means more reach, thereby helping maximise mental availability amongst all potential category buyers.

Other than in tightly defined geographies, mail is rarely used to generate mass coverage. However, it can improve a campaign’s overall reach when used as part of a multi-media plan. Research by Ebiquity in 2020 demonstrated that many marketers appear unaware of this opportunity.

Q: Which channels are most effective at maximising campaign reach?

Evidence		
1	Out of home	10
2	TV	9
3	Radio	8
4=	Social media	7
4=	Direct Mail	7
6	Newspapers	5
7	Magazines	3
8	Online display	3
9	Online video	2
10	Cinema	1

Perception		
1	TV	4.8
2	Online video	4.4
3	Social media	4.3
4=	Out of home	3.8
4=	Radio	3.8
6	Online display	3.6
7	Newspapers	2.9
8	Magazines	2.5
9	Cinema	2.5
10	Direct Mail	2.2

¹⁰ The ARF spells out how cross-platform marketing boosts ROI | WARC

Source: Re-evaluating media for recovery | Ebiquity

Action #3:

Leverage mail’s ability to amplify other channels

Another reason why multi-media campaigns work harder is the synergies that exist between channels. As Analytic Partners has proven, “advertising helps improve the effectiveness of other advertising... for instance, performance marketing is often significantly more effective when combined with brand messaging.”¹¹

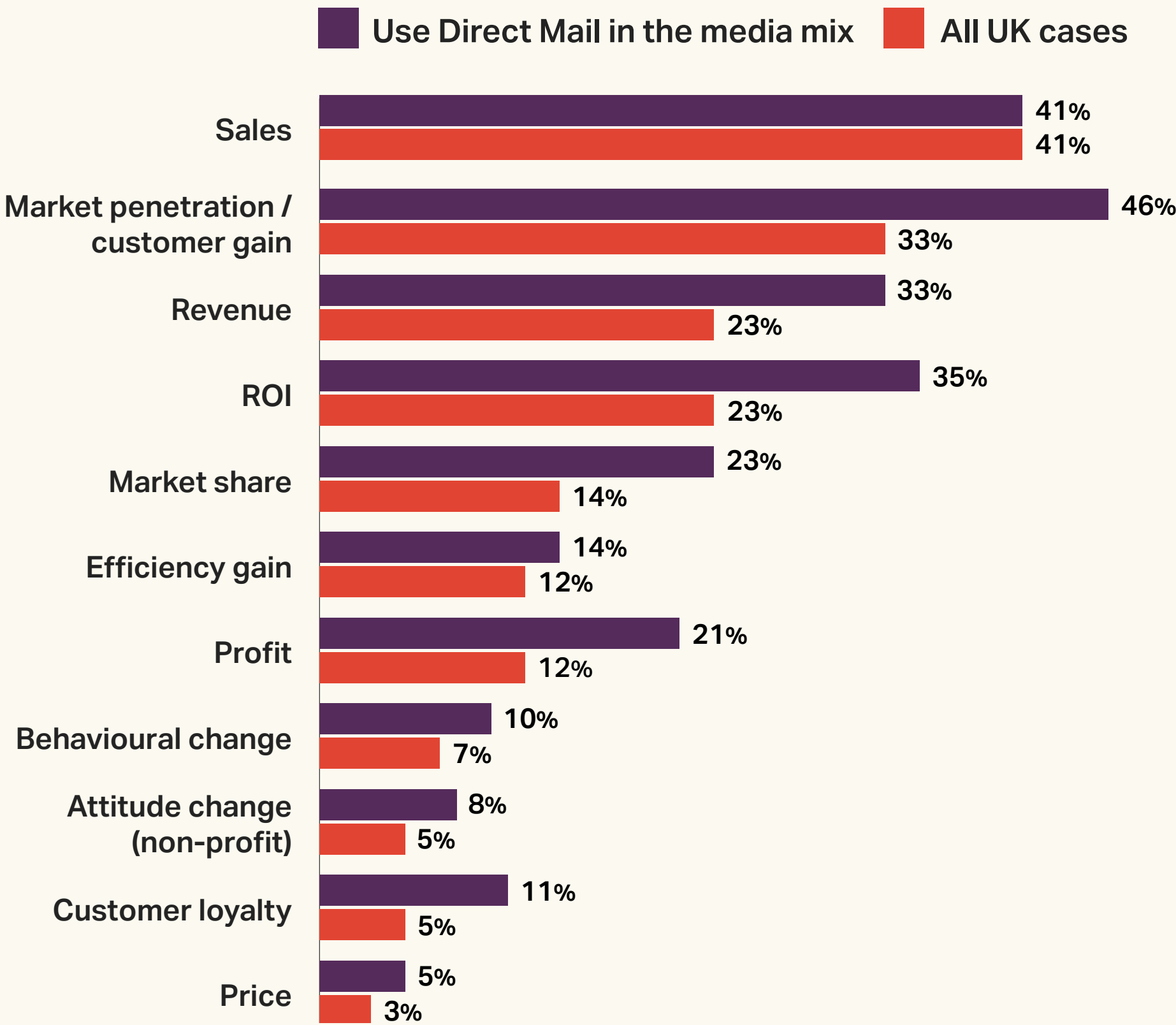
In a 2021 white paper, ‘Driving effectiveness with Direct Mail’, WARC conducted a close analysis of UK case studies from the previous five years. WARC’s database comprises studies that have been entered into marketing effectiveness awards and can thus be regarded as ‘successful’.

¹¹ Analytic Partners report: Looking at marketing performance through today’s media complexity | WARC

Compared to the total sample, campaigns that featured Direct Mail within the mix were significantly more likely to deliver positive outcomes in terms of market penetration, market share, customer loyalty, revenue and profitability.

As we wrote at the time: “Mail appears to not only deliver direct performance. It also amplifies the messages and calls-to-action run through other channels, particularly digital.”

Proven outcomes



Source: Driving effectiveness with Direct Mail: Making a physical impact in a digital world | WARC

Action #4: Define when mail will have the biggest impact

Mail possesses certain attributes that, in combination, make the channel unique: its innate physicality; the fact that “the ad is the medium”; high levels of personalisation; and the ability to deliver very extended dwell-times, both on first interaction and subsequently.

This all adds up to a strong hand, but marketers must decide when best to play it. For some brands, mail’s principal role is to prime and reward a defined audience in advance of a mass-market campaign. Common examples would include giving loyalists first sight of next season’s holidays (as we saw with Cunard), or announcing the launch of a new car to current owners (per Land Rover).

Alternatively, mail might be deployed to capitalise on the awareness generated

by other channels. Charities, for instance, frequently follow up TV campaigns with an information-rich mailing and a formal request for donations. DTC companies adopt the same strategy, often including a time-limited incentive to nudge people from interest into action.

Timing is also critical for many Business Mail campaigns, particularly if the goal is to secure a contract renewal or nudge a customer into using their ISA allowance.

Programmatic Mail is another interesting use case. Every brand that sells online has abandoned baskets and unfulfilled enquiries, many from identifiable and addressable customers. As SunLife proved, Programmatic Mail can be an effective way to ‘save the sale’.

By deploying mail strategically at key moments, we can witness moments of magic throughout the customer experience.

Considering mail in these moments can be really powerful.

Lucy Halley | Executive Head of Strategy | Havas CX Helia



How TalkTalk leveraged mail as part of a hyper-targeted campaign



Context:

The roll-out of Full Fibre is the next big revolution in the UK telecoms industry.

For TalkTalk, this represents a real business opportunity – but also a significant marketing challenge since households are literally being connected street-by-street. With a much smaller budget than its rivals, every penny has to count. Advertising wastage is simply not an option.

Strategy:

TalkTalk believed it could use data to out-think its competitors. It developed a media planning approach built from the ground-up, targeting prospects at the postcode and household level.

To create impact, OOH was the first component in its integrated campaign. Addressable channels including paid social, online display and connected TV were then added to increase reach and frequency.

The final, critical element was mail. With other channels having primed the market, mail was used to educate and convert. Three variants of the mailer were produced, based on a household’s predicted propensity to buy. These propensity scores were kept under constant review and refined as results started to come in.

Results:

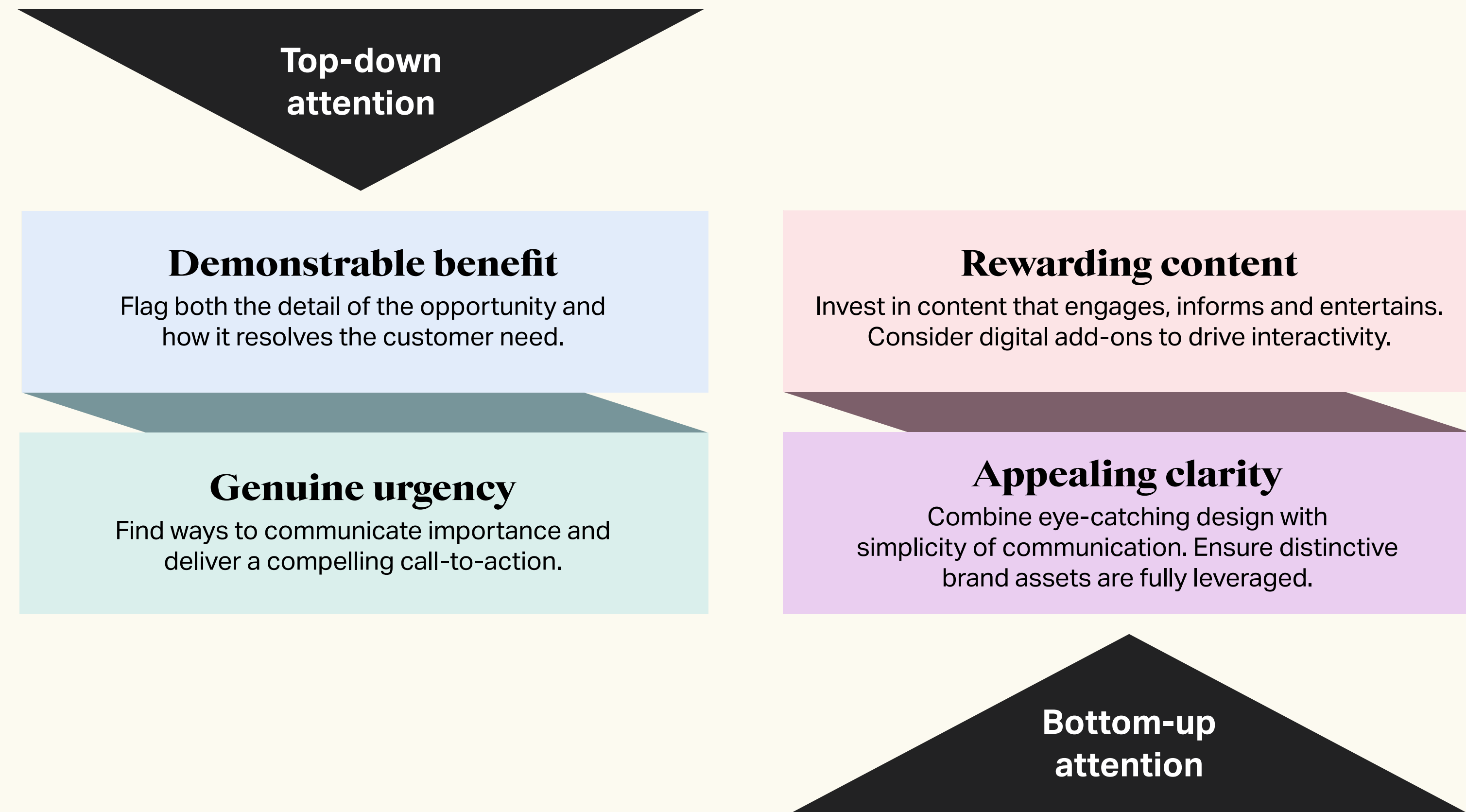
- Sales to new customers in targeted postcodes were 380% higher than in non-targeted postcodes.
- Sales to existing customers in targeted postcodes were 36% higher than in non-targeted postcodes.
- Via ongoing optimisation of its propensity scoring system, TalkTalk was able to reduce the cost per acquisition for mail by 54% over the course of the campaign.

Read the full case study here: [TalkTalk Future Fibre – beating the competition street by street](#)

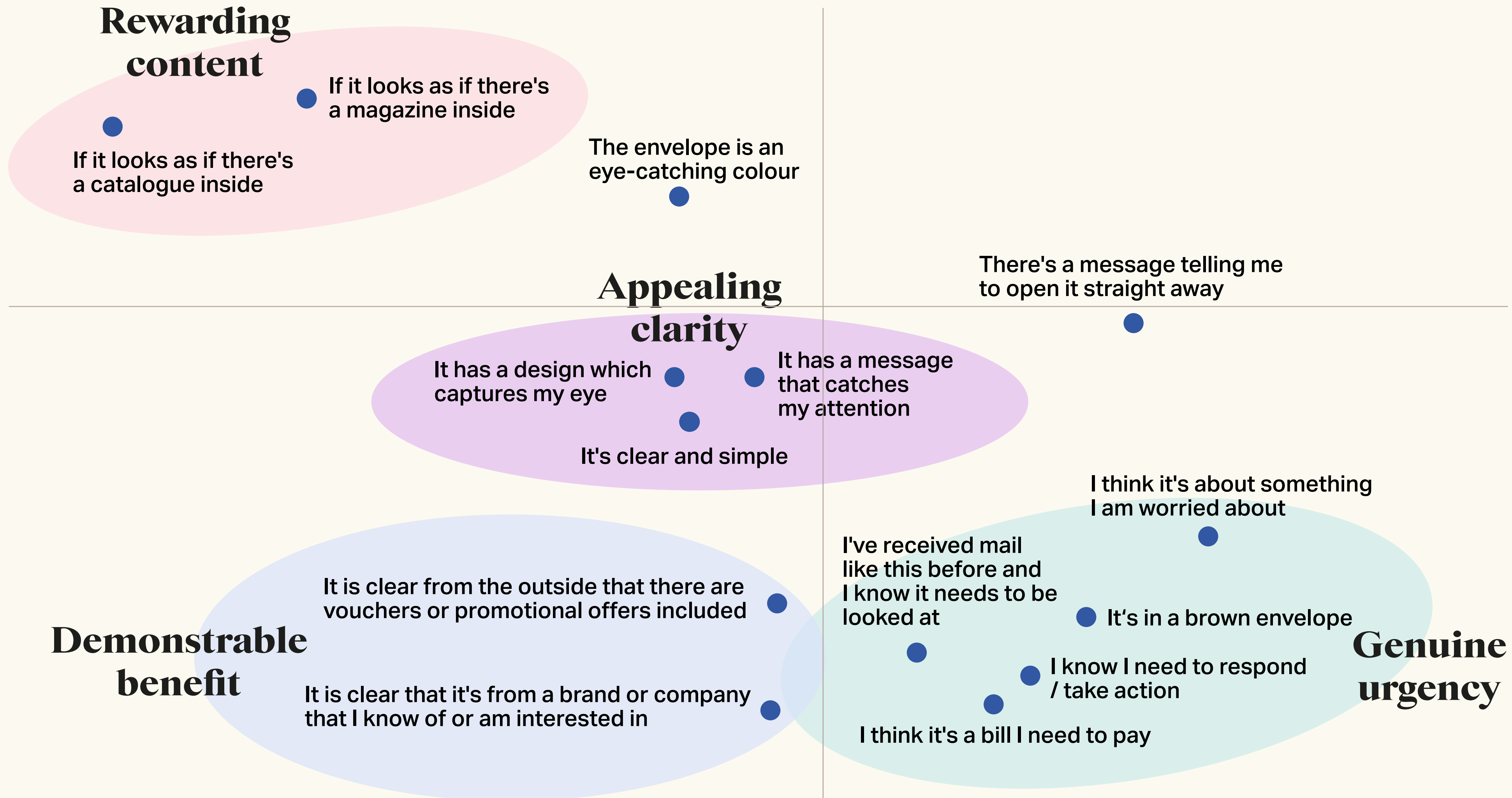
Action #5: Focus on creativity to multiply commercial impact

Scientists split attention into two types: 'top-down', which relates to those mental processes required to plan and accomplish a task; and 'bottom-up', which is driven by external, often unexpected factors. In the language of marketing communications, we can think of these as referring to 'relevance to a buying need' and 'creative stand-out' respectively.

In its research, Marketreach identified the elements most likely to persuade someone to interact with a piece of mail immediately. The results are visualised in the correspondence map on the next page. The closer the variables sit on the map, the more likely they were to be selected together.



Q: When you receive mail, what makes you open the envelope or look at it straight away?



Base: n=328
Source: Marketreach, Attention Research, Blue Yonder 2023

Action #6: Increase response levels by harnessing digital technologies

Mail is one of the world’s oldest communications channels. But that doesn’t mean it’s old-fashioned. Progressive brands are using new technologies to make mail more interactive than ever before.

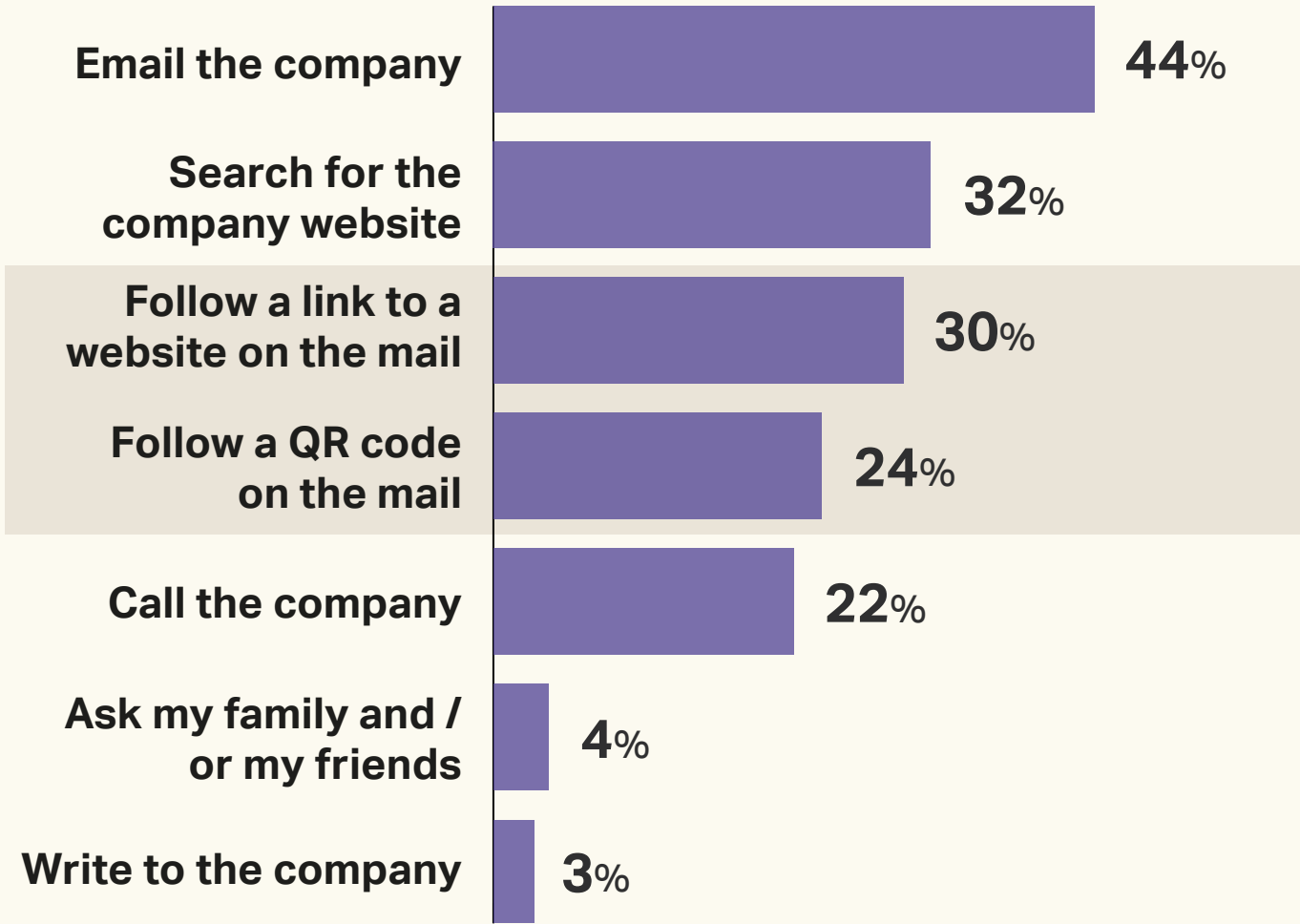
COVID familiarised many of us with QR codes. Research shows they’re now a strongly favoured route for responding to mail or discovering more about the products promoted.

Including a personalised URL (PURL) within mail can take recipients to their own landing page. PURLs enable brands to create more individualised experiences and glean deeper insights into the customer journey.

Digital technologies are throwing up other opportunities too, including:

- **Prompt to voice.** Mail can encourage people to order a sample via Alexa or other smart speakers.
- **Augmented reality,** bringing an overlay of digital information into the user’s home environment.
- **Programmatic Mail.** By re-targeting shoppers who have left items in abandoned carts.

Preferences for responding to mail



Preferences if planning a purchase



Base: n=328
Source: Marketreach, Attention Research, Blue Yonder 2023

How mail persuaded Toolstation's customers to order online



Context:

Toolstation was founded on its quarterly catalogue. For many customers, it had become an indispensable part of their working lives.

While there were significant risks, Toolstation knew things had to change. The catalogue was expensive to produce and impossible to update regularly.

How could it encourage customers to use its website instead?

Strategy:

With mail the chosen channel, the brand faced the knotty problem of boiling an 800-page catalogue down into a 4-page mailpack.

Data analysis showed the typical customer only shopped from six of Toolstation's 21 departments, and usually bought the same items. Armed with this insight, the company set about creating 143,000 ultra-personalised mailers.

Each pack contained appealingly designed QR stickers that linked directly to the products the individual customer purchased most often. Attached to a van dashboard or toolbox, these stickers ensured the brand was always within arm's reach.

Results:

- Even allowing for thousands of different iterations, the mailpack was 75% cheaper to produce than the catalogue. This saved Toolstation nearly £1m per year.
- The initiative was positively received, with incremental traffic to the website increasing by 10%.
- New-to-online customers shopped 9% more frequently than before and their average order value rose by 5%, leading to a 14% increase in revenue per customer.

Read the full case study here: [My Toolstation](#)

Expert viewpoints

In terms of geotargeting, clients are interested in making their advertising unmissable in a certain postcode.

You can't necessarily activate TV and radio for a local area and down to a postcode. But mail just fits perfectly in a postcode and is really personalised.

Ian Stevens | Chief Investment Officer | Wavemaker UK



I'm a massive fan of mail and I genuinely believe it still has a role in the customer experiences that we create.

I think we've proven with the Toolstation campaign how effectively it can connect the offline and the online experience, and often that can be problematic for clients.

Lucy Halley | Executive Head of Strategy | Havas CX Helia.



Mail creates an environment that has the potential to deliver more sustained attention to a message than any other channel.

The challenge lies in attracting enough attention that a person picks up a mail piece and opens it. That's a creative challenge as much as a media one. Once the mail has been picked up and read, then we know it can really deliver.

Geoff de Burca | Joint Chief Strategy Officer |
EssenceMediacom UK



Takeaways

Mail is an effective solution to the challenge of attention scarcity. It may be time for brands to re-evaluate its role within the marketing mix

Increasing share of voice generally leads to positive commercial gains. The benefits are magnified when additional spend is focused towards high-attention channels like mail.

Mail's share of UK adspend has been in gradual decline, making it more affordable for brands to test the impact of achieving greater 'share of doormat'.

Marketers who pursue this opportunity as part of a multi-media plan are also likely to see an increase in total campaign reach.

Mail is a powerful amplifier of other media channels, especially when deployed at key moments within a campaign

In 2021, WARC conducted an analysis of UK case studies from the previous five years.

Campaigns that featured Direct Mail within the mix were significantly more likely to deliver growth in market penetration, market share, revenue and profitability.

Whether used to prime a defined audience in advance of a mass-market campaign or capitalise on pre-existing awareness, mail strongly amplifies the impact of other channels.

Heightened creativity and the inclusion of digital response mechanisms can maximise engagement and interaction

Marketreach's new research has pinpointed the creative factors most likely to drive above-average levels of engagement.

Demonstrable, customer-specific benefits should be communicated with an irresistible sense of urgency. Content should be informative, entertaining and easy to digest.

New technologies, including AR, programmatic and QR codes, are making the channel more interactive than ever before.

Pay attention – mail will surprise you



Amanda Griffiths

Head of Communications,
Planning and Insight
Marketreach

Advertising is always looking to the Next Big Thing: OOH going digital, TikTok turning content into entertainment, and digital channels continuing to explode, evolve and reinvent themselves with new offerings from A to, well, X.

In this stampede to 'the new', it's not surprising that mail is often overlooked. It's a message, on paper, delivered by your Postie – and it's been that for 500 years.

But thinking mail is only that is a huge mistake. And when the industry conversation turned to Attention, it was time for Mail to stand up and be heard (or read).

This report and all of our previous research consistently proves that mail does what no other media channel can do. It's a personal message that comes into the home. It is nearly always looked at and opened. Its physicality delivers a welcome break in

a digital world, something that fits into consumers' lives rather than interrupting and demanding attention now. It is a clear, open and trusted message to an individual from a brand. And a message that has a strong role in the customer journey – whether that be a purchase, donation, booking, payment, agreement or attendance.

The reasons why mail stands apart are also the reasons it works so well with all other media. In a world of messages that can often feel loud, intrusive and confusing, mail provides a welcome respite – time to read, think and consider, often multiple times. It builds on awareness created by other media to guide consumers to the all-important action. This study shows that mail holds attention not for 2 or 3 seconds, but for 2 or 3 or even 10 minutes.

And this research shows the more attention mail holds, the more action it creates.

Which opens endless opportunities for planning mail into the media mix where it can deliver the most impact.

For many brands, mail's power will be driving the final push at the transaction stage. But there are attention advantages to be had throughout the marketing funnel. Mail can create awareness for a brand, delivering the full story of something new, with a message guaranteed to be opened and viewed. It can build consideration using a QR code to engage customers to gather more information. And it can move consumers close to intent by turning brand interest into engagement through powerful positive actions from a test drive to a recipe download, a catalogue request to a store visit.

So the next time you are looking for a new, impactful and creative media idea to make consumers take notice, focus, engage and act – pay attention to Mail.

In summary

Attention is the lifeblood of brands

For marketers, attention scarcity presents a significant challenge. The evidence contained in this paper shows that mail is one of the most effective and efficient channels for capturing meaningful media attention.

Mail delivers very extended dwell-times

New research by Marketreach indicates that the time spent with mail could be even higher than JICMAIL's benchmarks. Over and above quantity, the channel provides a high quality of attention.

Mail can drive significant uplifts across the marketing funnel

The channel's ability to cut through the noise, its sensory appeal and the fact that it is often retained for future reference mean mail can impact key brand metrics from awareness to transaction.

Mail is strongly additive to the media mix

Mail is highly complementary to other marketing channels especially when strategically planned and deployed at key moments in the campaign.

Who we are

At WARC, our purpose is to save the world from ineffective marketing by putting evidence at the heart of every marketing decision.

We believe that effective marketing is based on facts and not opinions.

Since 1985, we’ve brought confidence to marketing decisions through the most trusted research, case studies, best practice, data and inspiration.



Today, we help 75,000+ marketers across 100+ countries. Our clients include the world’s leading brands, advertising and media agencies, media owners, research companies and universities – including the top-five largest agency groups and top-five largest advertisers in the world.

Learn more about WARC Advisory [here](#).

For more information on bespoke advisory projects, contact imaad.ahmed@warc.com or edward.pank@warc.com

About Marketreach

Marketreach is the marketing authority on commercial mail. It provides evidence of mail’s effectiveness and gets brands and businesses excited about its creative and strategic possibilities. In a digital age, mail is changing fast – we aim to keep you up-to-date on the latest innovations and opportunities.

As part of the Royal Mail Group, Marketreach is committed to responsibly managing its impact on the world and having a positive relationship with our customers, our people, our communities and our environment.

Find out more:
<https://www.marketreach.co.uk>

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