

# MAIL IS WORKING EVEN HARDER FROM HOME: LOCKDOWN EFFECTIVENESS INSIGHTS

\*LETTER SPECIALIST NAME\*

September 2020



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LASTING  
IMPRESSION.**  
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# MAIL IS ONE OF THE ORIGINAL IN-HOME ENGAGEMENT CHANNELS...

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IT'S **ALWAYS** WORKED FROM HOME AND CONTINUES TO FORM POWERFUL **CUSTOMER CONNECTIONS**





**BUT, MAIL WAS OFTEN  
OVERLOOKED DURING  
THE PANDEMIC**

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DID SOME MISS A TRICK DURING  
THE HEIGHT OF THE CRISIS?

# WE ANALYSED THE LOCKDOWN DATA TO FIND OUT

MAKING YEAR-ON-YEAR COMPARISONS BETWEEN Q2 2019 AND Q2 2020

**JIC  
MAIL**

Mail Media Metrics

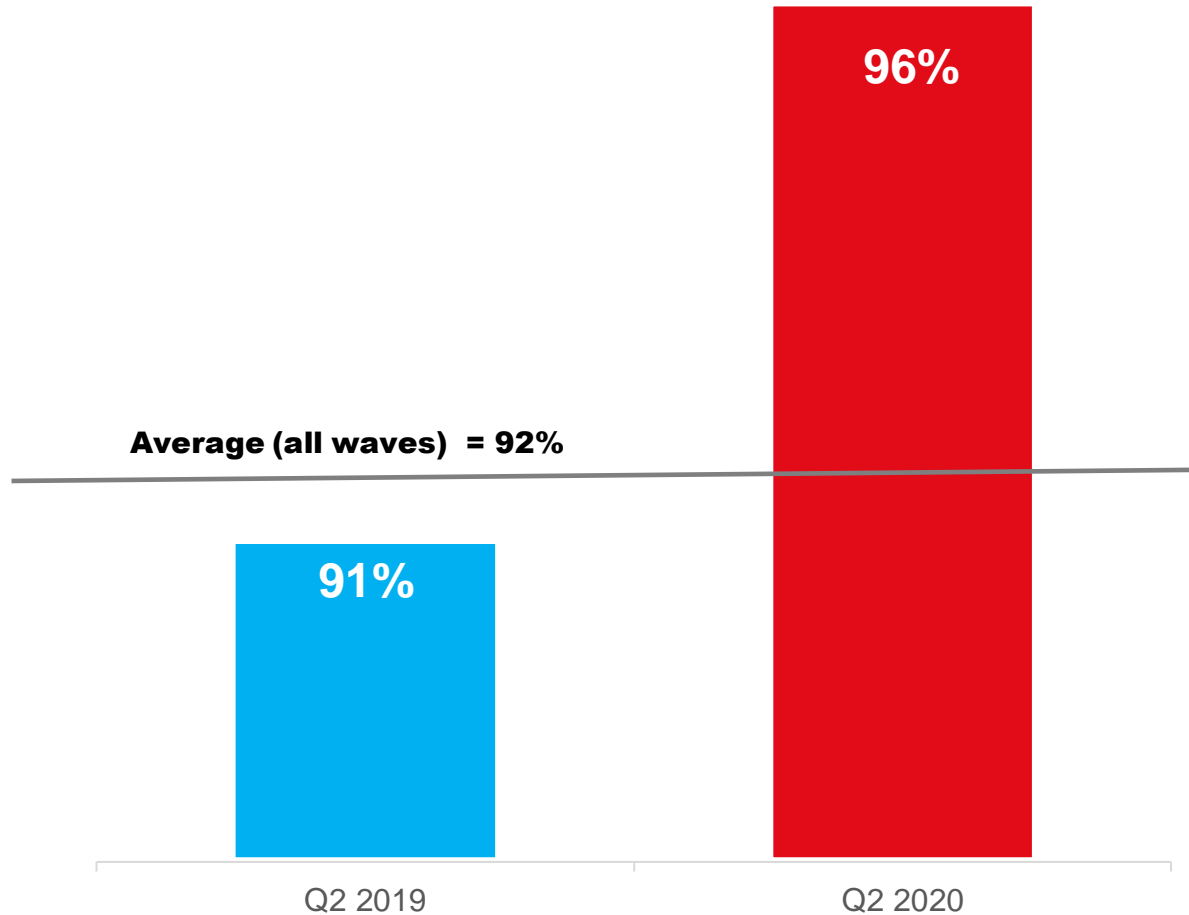
- We reviewed and compared JICMAIL data gathered over the last 2 years – with emphasis on the critical Covid-19 period, and focusing on the key metrics; reach, frequency, lifespan, how long kept at home and the physical and commercial interactions with all mail types; Business Mail, Addressed Advertising Mail and Door Drops.
- Diary based survey app with Kantar TNS
- Records all mail interactions across a 28 day period
- 1,000 UK nationally representative households
- 150,000+ mail items





**AND WHAT WE FOUND...  
WAS RECORD-BREAKING  
LEVELS OF INTERACTION  
DURING LOCKDOWN**

# A RECORD 96% OF ALL MAIL WAS ENGAGED WITH



The engagement rate\* of mail increased to 96% in Q2 2020 – a 5% gain on the same period the year before

\*Mail engagement rate = % of mail processed in some way including – opening, reading, sorting, put aside for later, filed, put on display, put in the usual place

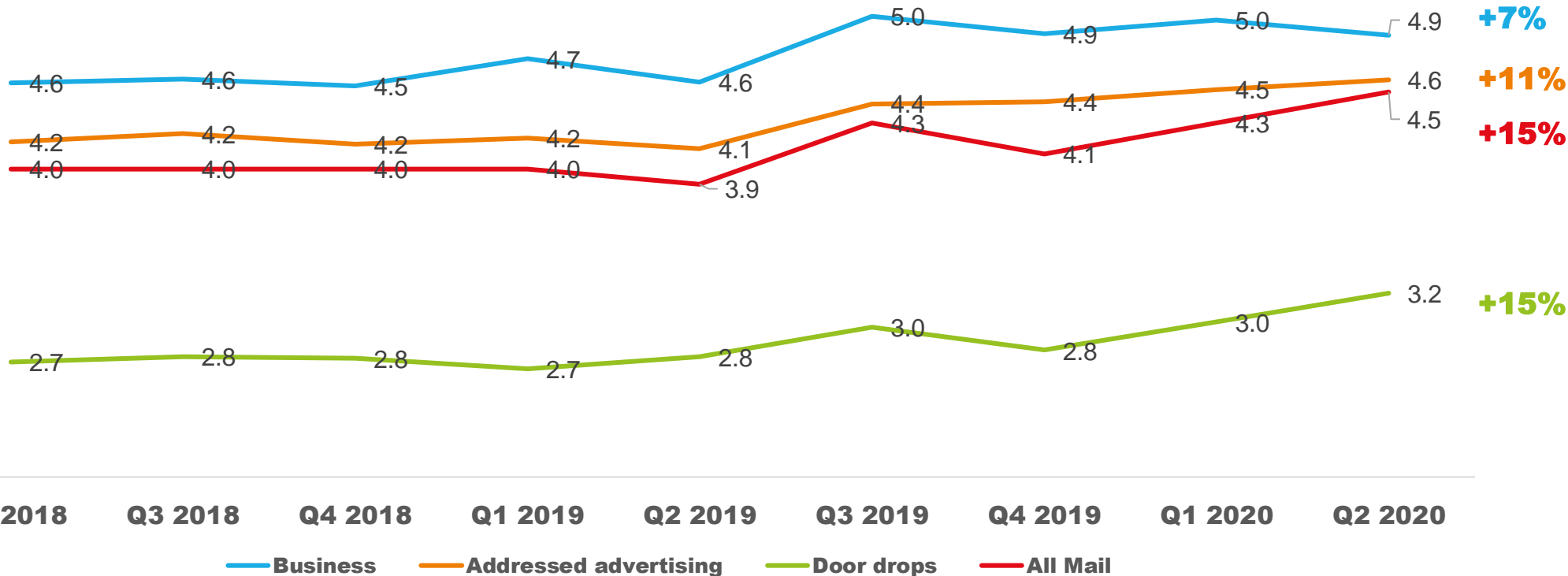
Source: JICMAIL Q2/17 TO Q2/20 Base: All mail; (Q2 2019 n = 12,935, Q2 2020 n = 7,532)

# FREQUENCY OF EXPOSURE TO ALL MAIL IS AT ITS HIGHEST LEVEL IN RECENT HISTORY



Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; n = 106,588

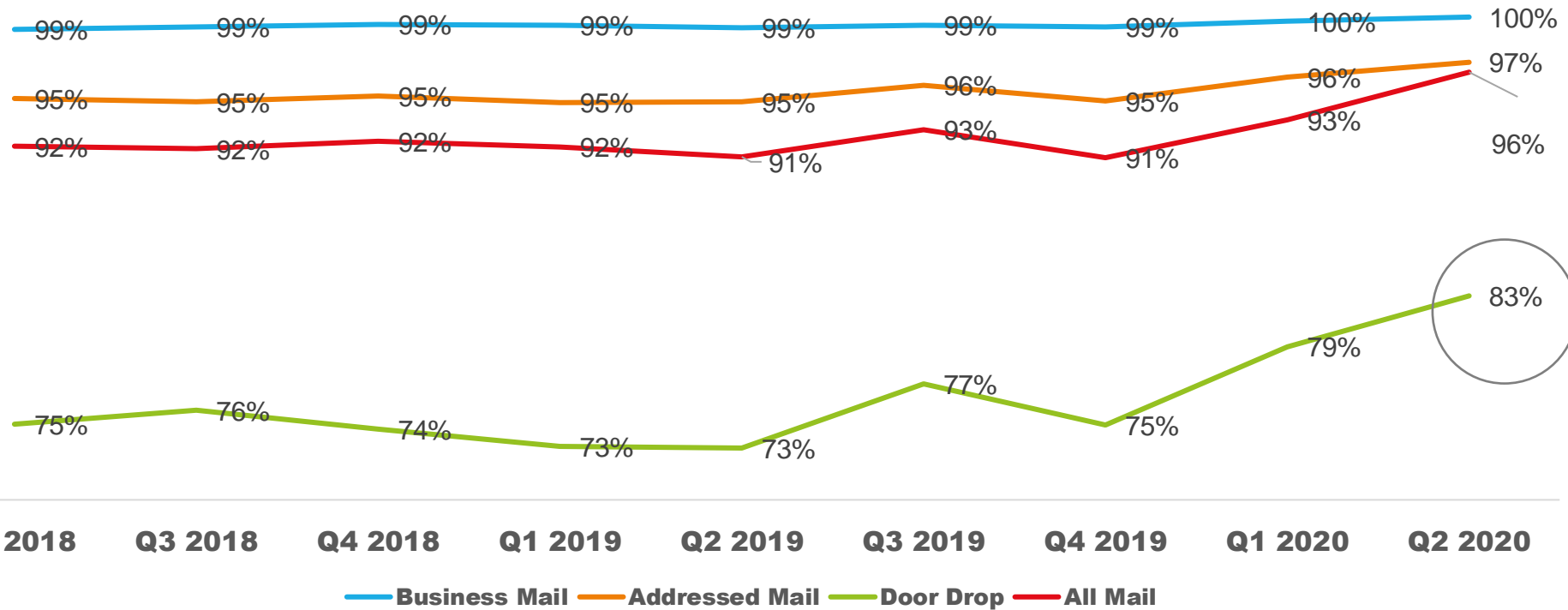
# HUGE GROWTH IN Y-O-Y INTERACTION WITH ALL MAIL TYPES, PARTICULARLY **AD MAIL** & **D2D**



Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; n = 106,588 (Q2 2019 n = 12,935, Q2 2020 n = 7,532)



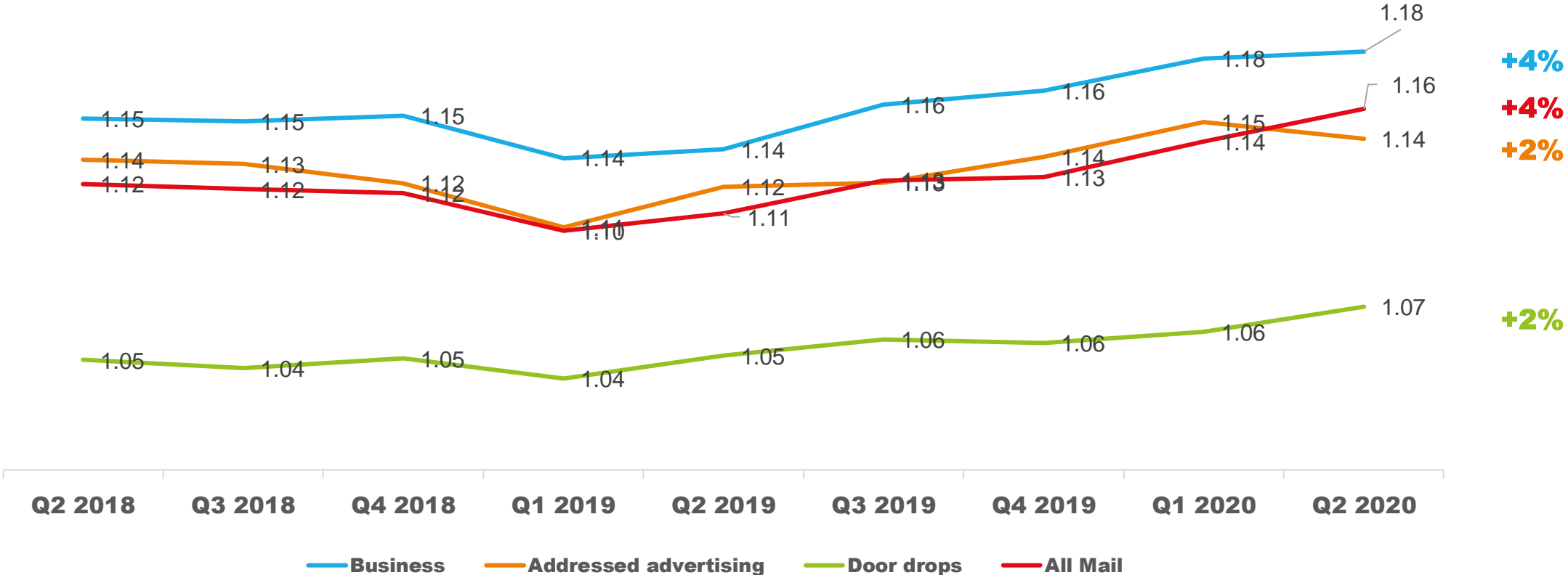
# DOOR DROP ENGAGEMENT IS HIGHER THAN EVER AND 100% OF BUSINESS MAIL IS ENGAGED WITH



Door Drop has the highest % increase in engagement

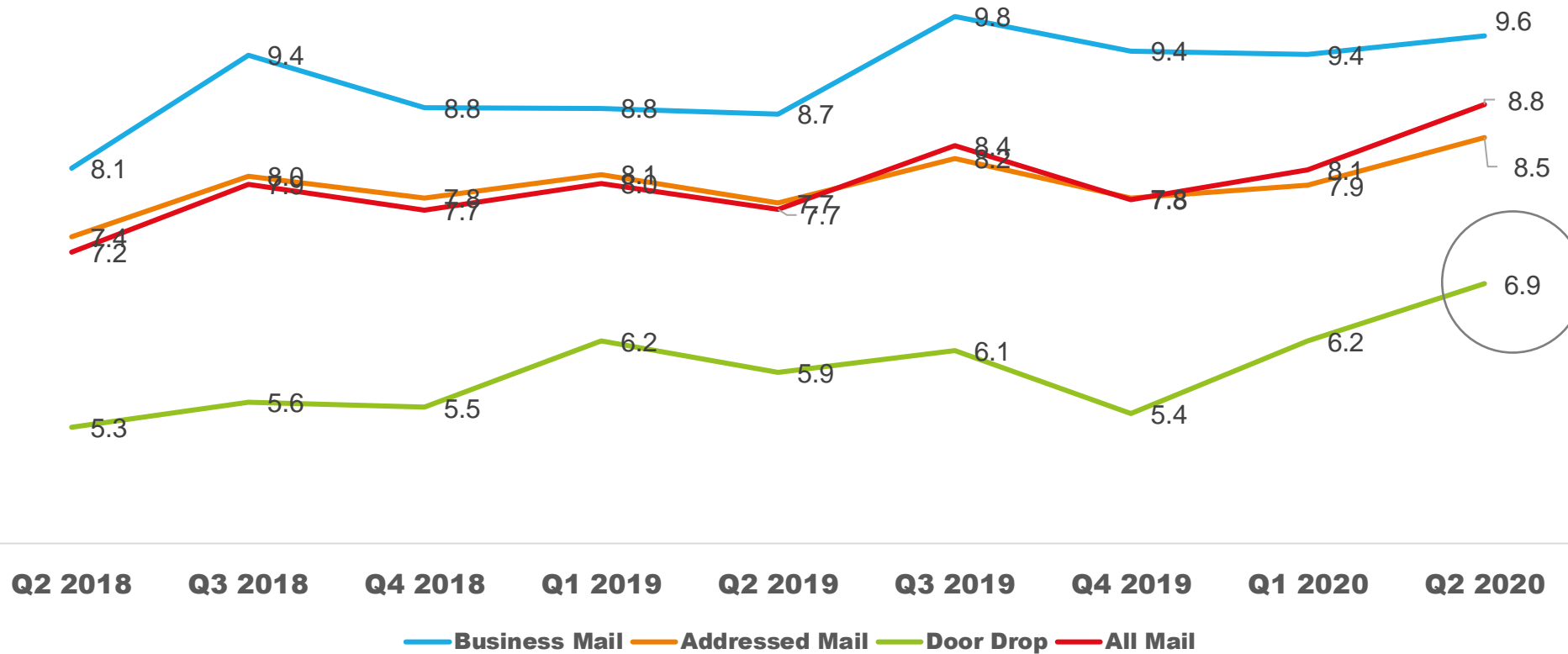
Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; n = 106,588 (Q2 2019 n = 12,935, Q2 2020 n = 7,532)

# MAIL REACH FOR ALL MAIL TYPES HAS ALSO INCREASED, MEANING EVEN MORE AD IMPRESSIONS



Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; n = 106,588 (Q2 2019 n = 12,935, Q2 2020 n = 7,532)

# MAIL LIFESPAN HAS INCREASED TOO – WITH ALL MAIL TYPES LIVING IN THE HOME LONGER

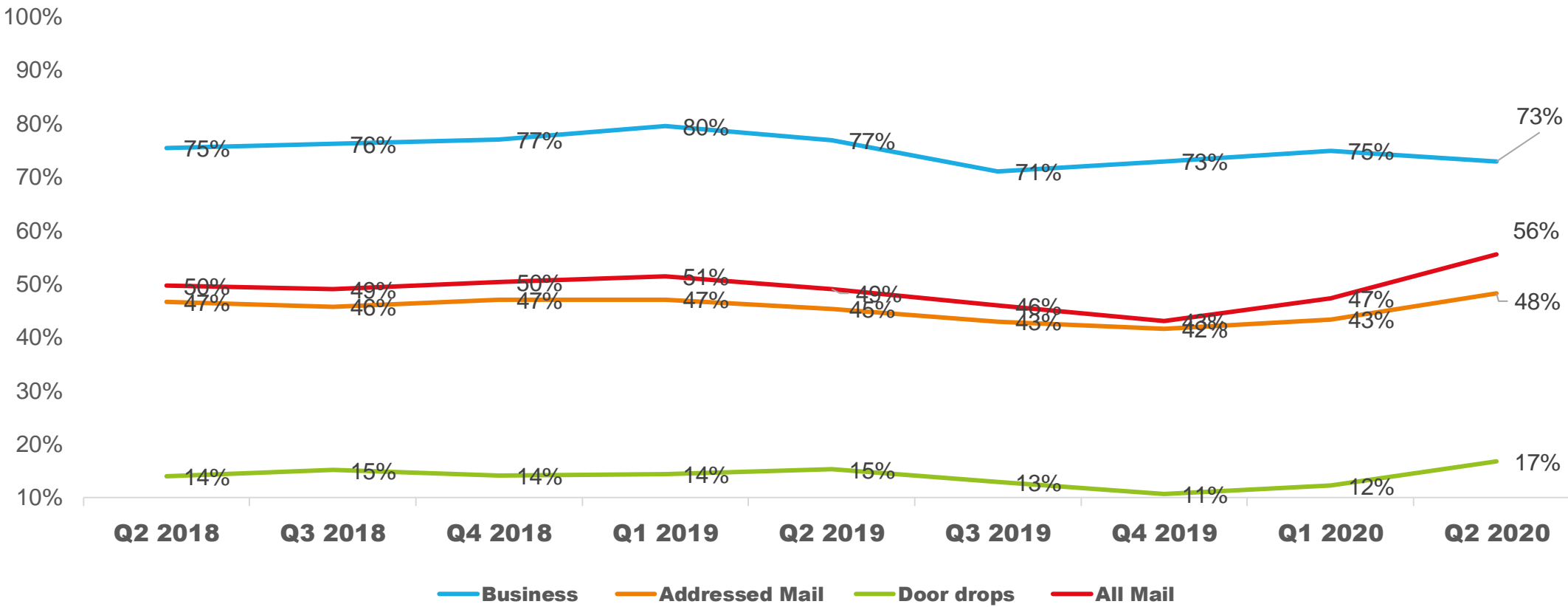


The average number of active engagements with mail at home was higher during the height of the pandemic

Door Drops again, having the highest % Increase  
**(+16%)**

Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; n = 106,588 (Q2 2019 n = 12,935, Q2 2020 n = 7,532)

# MAIL HAS REAL LONGEVITY: 56% OF ALL MAIL ITEMS ARE STILL ACTIVE IN THE HOME AFTER 28 DAYS



Almost 3/4 of all business mail is kept at home beyond 4 weeks

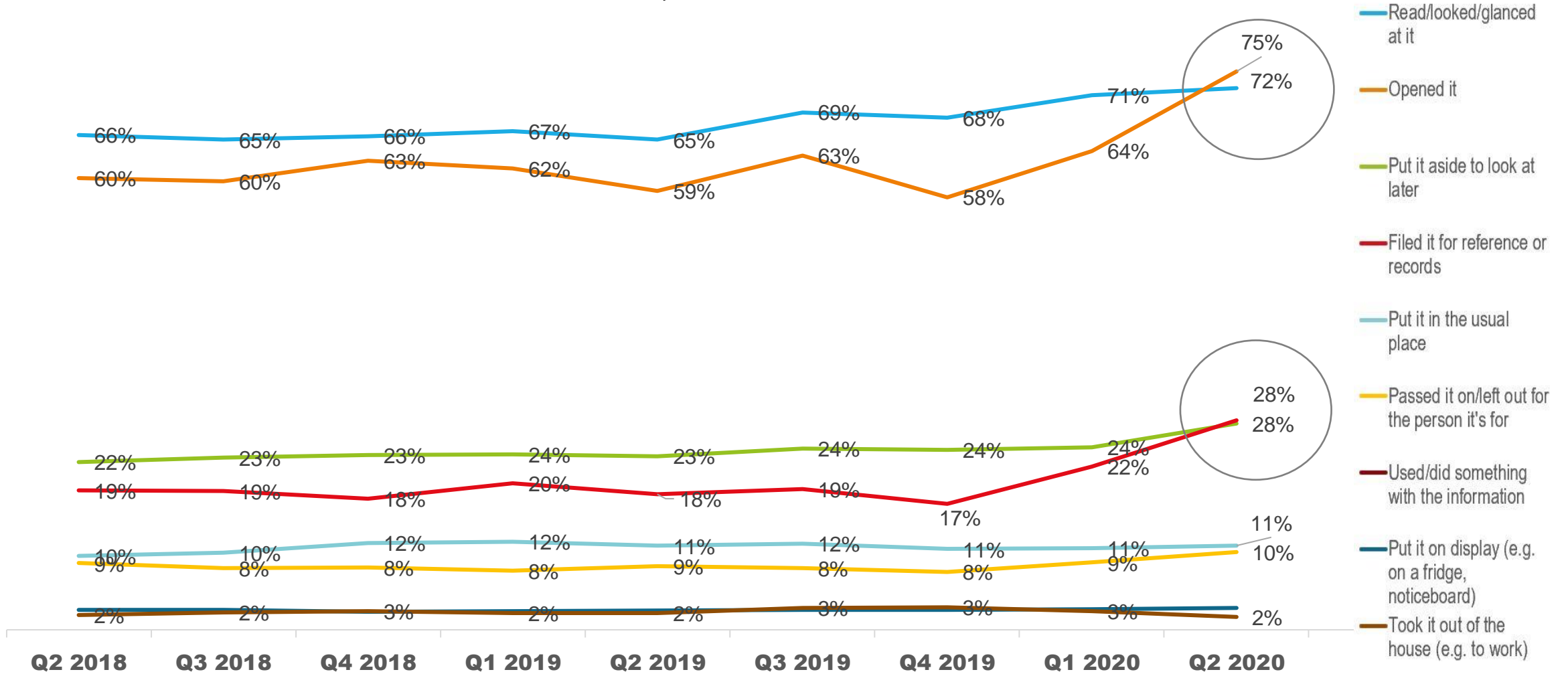
Nearly half of ad mail stays at home over 28 days

Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; n = 106,588



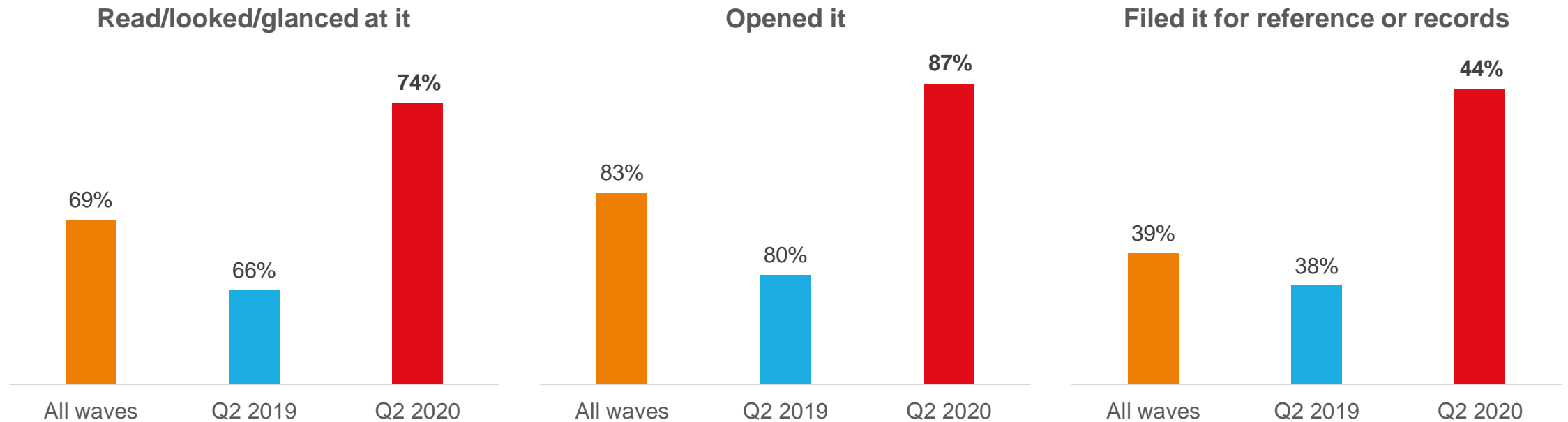
**WE'VE ALSO SEEN A CHANGE IN  
PHYSICAL AND COMMERCIAL  
BEHAVIOUR**

# HUGE Y-O-Y UPLIFTS FOR ALL TYPES OF MAIL - MAIL IS INCREASINGLY OPENED, READ AND FILED AWAY



Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; All waves n = 106,588; Q2/19 n = 12,935; Q2/20 n = 7,532

# THE PHYSICAL ACTIONS ASSOCIATED WITH BUSINESS MAIL HAVE INCREASED SIGNIFICANTLY Y-O-Y

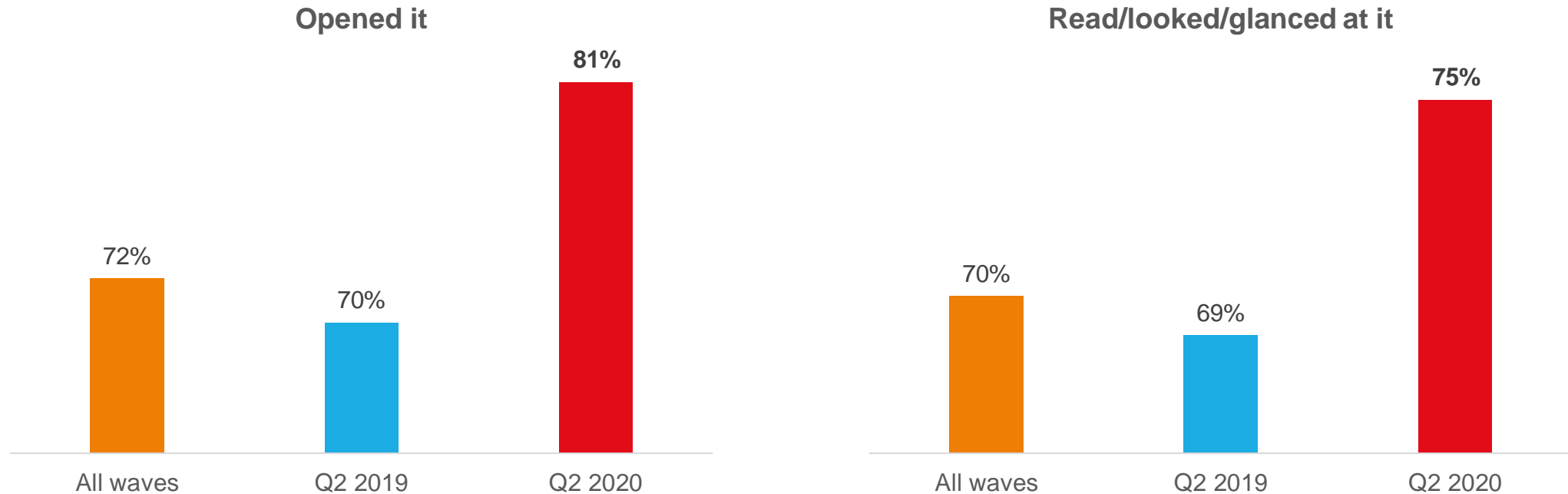


87% of business mail items were opened, 74% read/looked at, and 44% were filed away in Q2 2020



Source: JICMAIL Q2/18 TO Q2/20 Base: Business mail; All waves n = 43,212, Q2/19 n = 5,022, Q2/20 n = 4,246

# PEOPLE ARE ALSO OPENING & ENGAGING WITH AD MAIL MORE THAN EVER...



81% of ad mail items were opened, and 75% actively read in Q2 2020

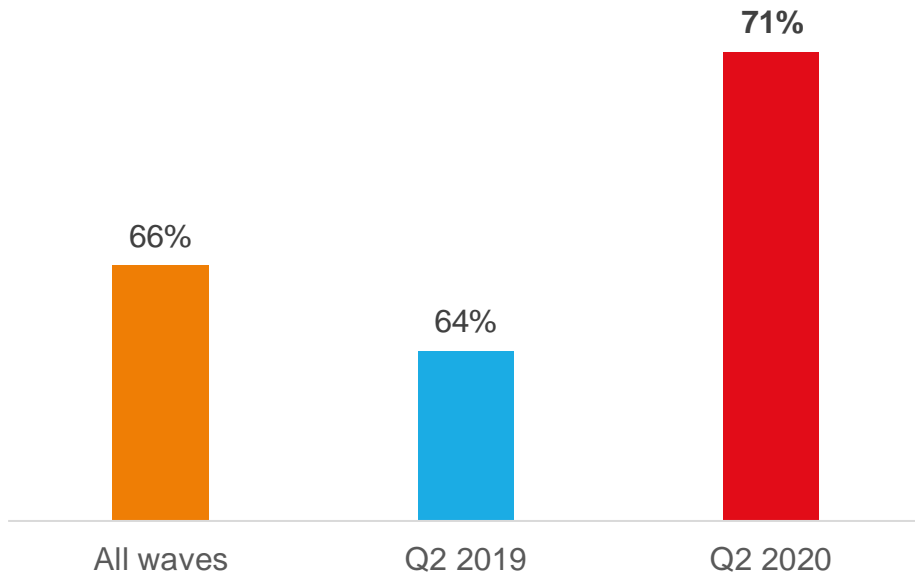


Source: JICMAIL Q2/18 TO Q2/20 Base: Addressed ad mail; All waves n = 48,516, Q2/19 n = 5,831, Q2/20 n = 3,085

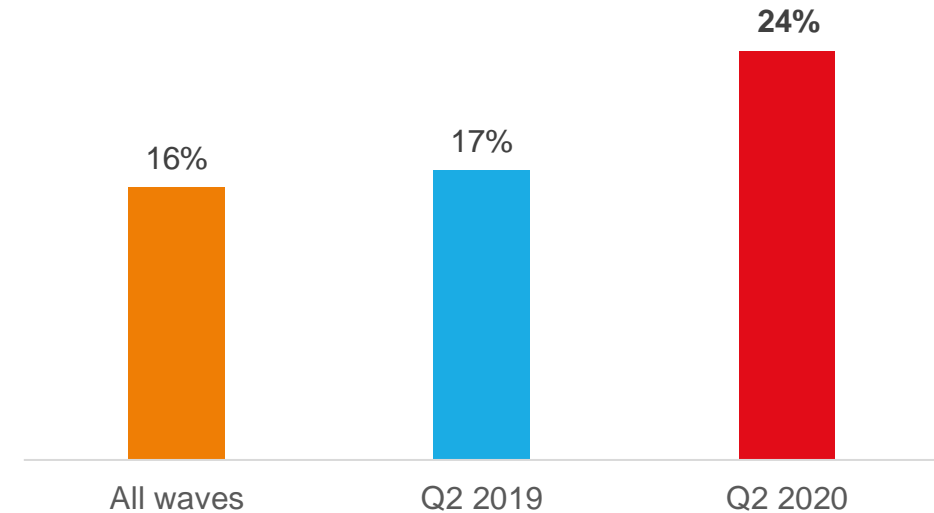


# AND THE PROPORTION OF DOOR DROPS READ AND PUT ASIDE FOR LATER IS HIGHER Y-O-Y

Read/looked/glanced at it



Put it aside to look at later

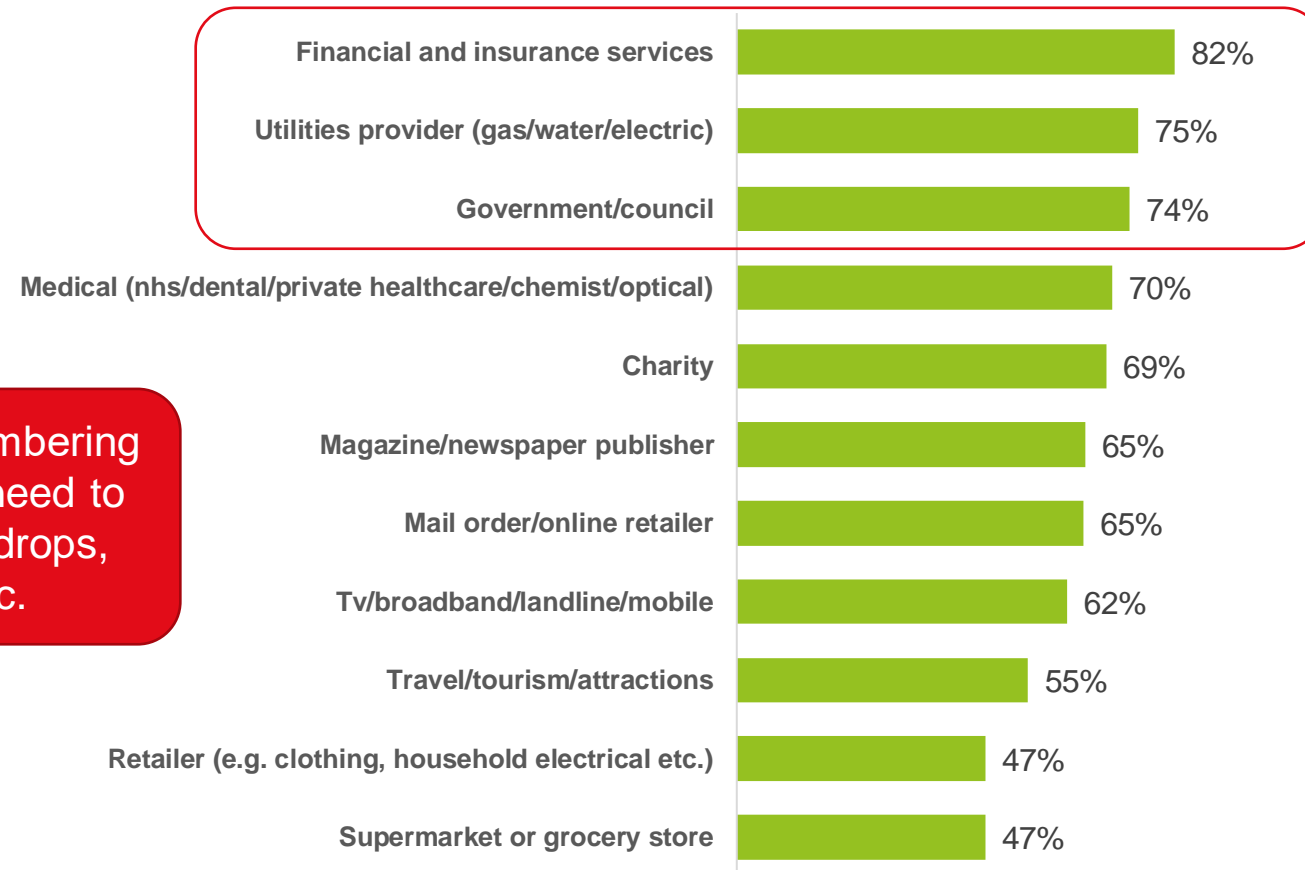


71% of door drops were read/looked at,  
and 24% were put aside in Q2 2020



Source: JICMAIL Q2/18 TO Q2/20 Base: Door Drops; All waves n = 22,047, Q2/19 n = 2,854, Q2/20 n = 963

# DURING THE CRISIS, SECTOR OPEN RATES ALSO INDICATED WHAT PEOPLE DEEMED IMPORTANT

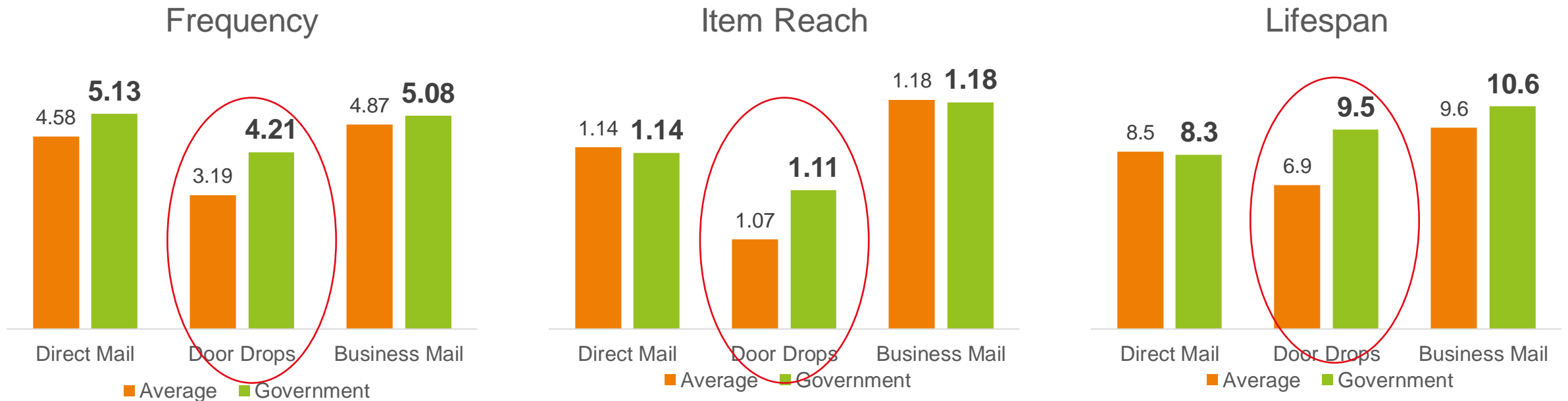


NB It's worth remembering not all mail types need to be opened; door drops, post cards etc.

Source: JICMAIL Item Data Q2 2017 to Q2 2020 n=7,837 Q2 2020 items

# WE SAW A HUGE SHIFT IN KEY GOVT MAIL METRICS

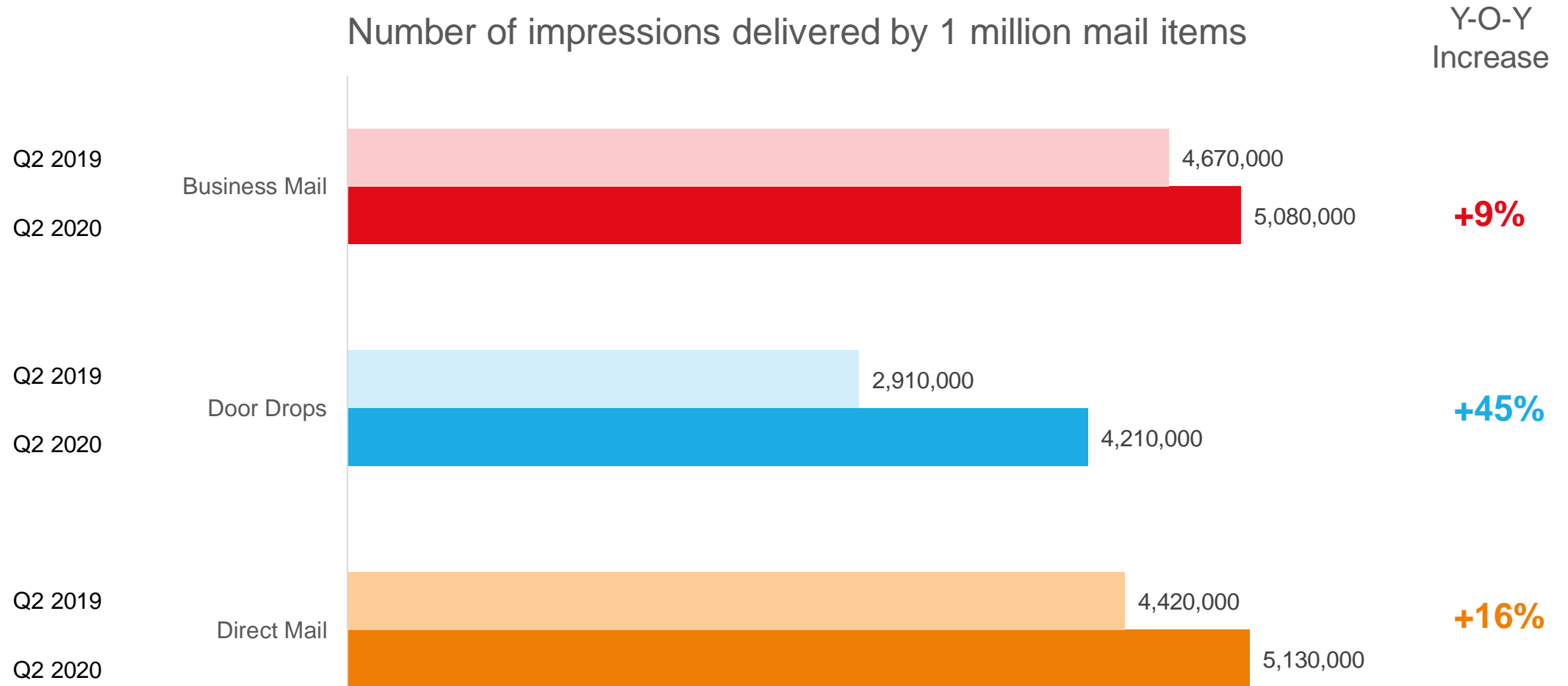
LARGELY ATTRIBUTABLE TO DOOR DROPS



Source: JICMAIL Item Data Q2 2017 to Q2 2020, Q2 2020 n=243 Government DM; 91 Government Door Drops; 457 Government Business Mail

# LEADING TO SIGNIFICANTLY MORE IMPRESSIONS

DELIVERED FOR THE AVERAGE GOVERNMENT MAILING



Source: JICMAIL Item Data Q2 2017 to Q2 2020, Q2 2020 n=243 Government DM; 91 Government Door Drops; 457 Government Business Mail

# MEANING THE BORIS LETTER DELIVERED

WHEN HE NEEDED TO DELIVER A VITAL MESSAGE

27.8m  
Households  
=  
Over 117m  
Impressions



10 DOWNING STREET  
LONDON SW1A 2AA

THE PRIME MINISTER

I am writing to you to update you on the steps we are taking to combat coronavirus.

In just a few short weeks, everyday life in this country has changed dramatically. We all feel the profound impact of coronavirus not just on ourselves, but on our loved ones and our communities.

I understand completely the difficulties this disruption has caused to your lives, businesses and jobs. But the action we have taken is absolutely necessary, for one very simple reason.

If too many people become seriously unwell at one time, the NHS will be unable to cope. This will cost lives. We must slow the spread of the disease, and reduce the number of people needing hospital treatment in order to save as many lives as possible.

That is why we are giving one simple instruction – you **must** stay at home.

STAY  
HOME

PROTECT  
THE NHS

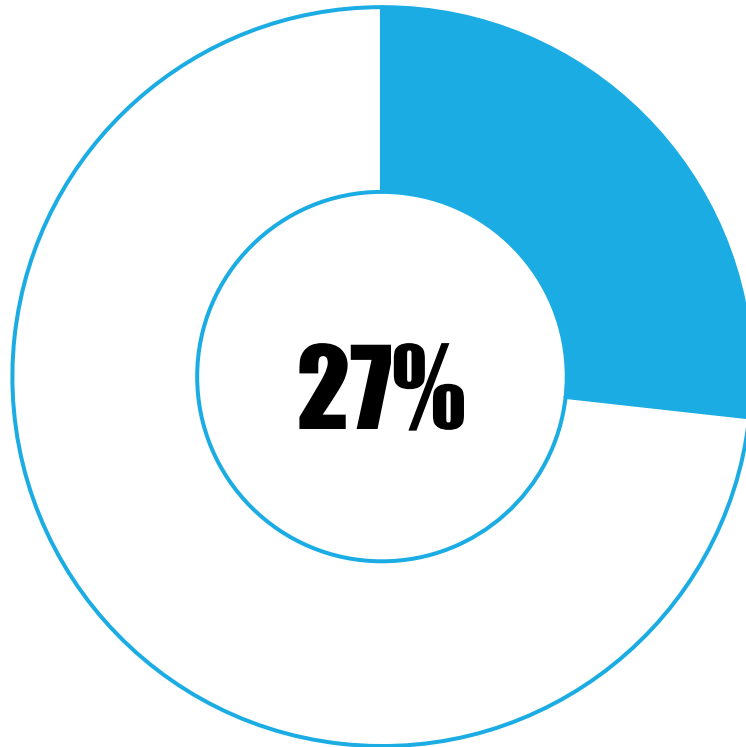
SAVE  
LIVES



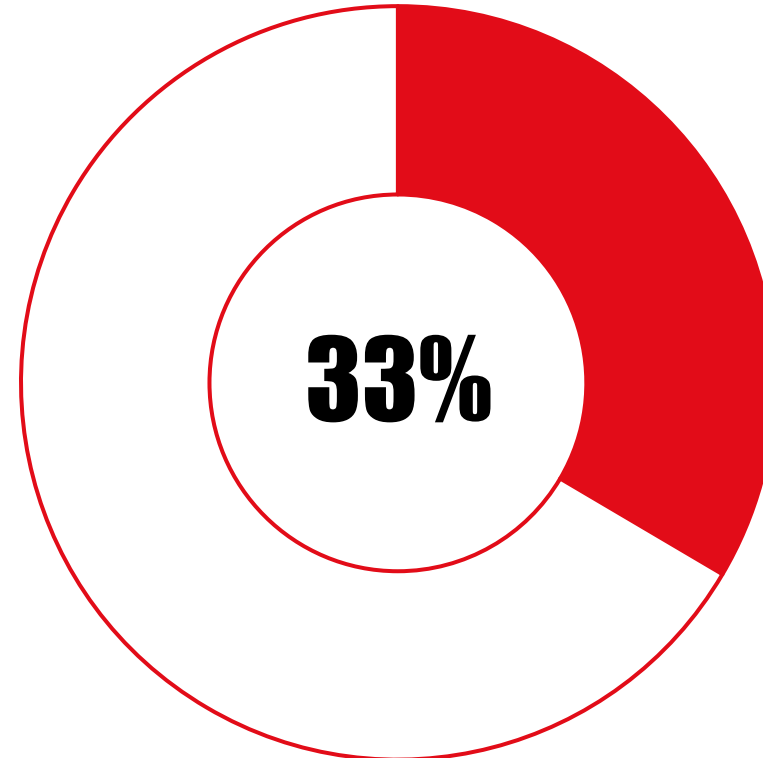
# MORE GENERALLY, 1 IN 3 MAIL ITEMS LEAD TO A COMMERCIAL ACTION DURING LOCKDOWN

Compared with 1 in 4 the year before

Q2 2019

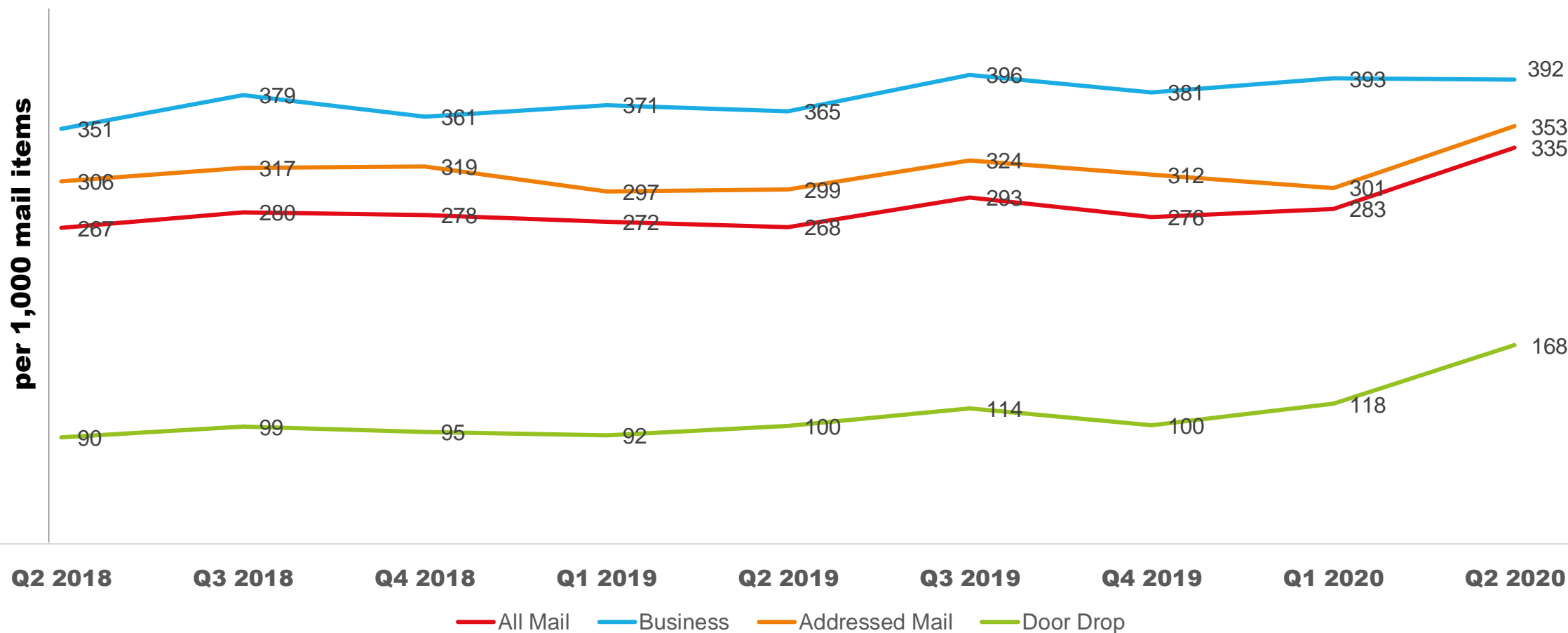


Q2 2020



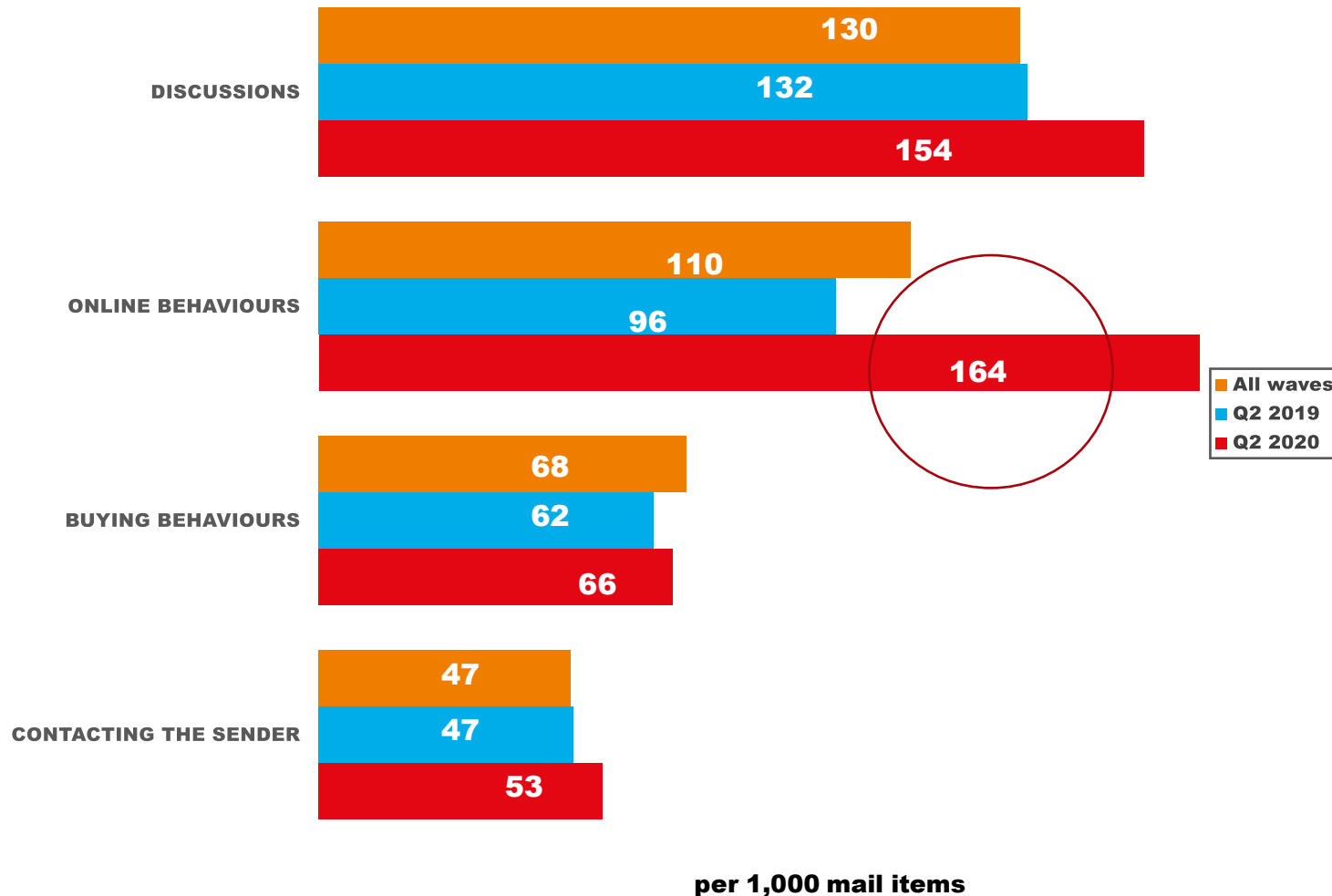
Source: JICMAIL Q2/17 TO Q2/20 Base: All mail; (Q2 2019 n = 12,935, Q2 2020 n = 7,532)

# AND IT'S WORTH NOTING THAT **DOOR DROPS** THAT LEAD TO A COMMERCIAL ACTION INCREASED BY 68% Y-O-Y



Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; All waves n = 106,588, Business n = 43, Addressed n = 48,516, Door Drops n = 22,047

# MAIL WAS POWERFUL AT DRIVING RECIPIENTS ONLINE DURING A TIME OF TRANSFORMATION

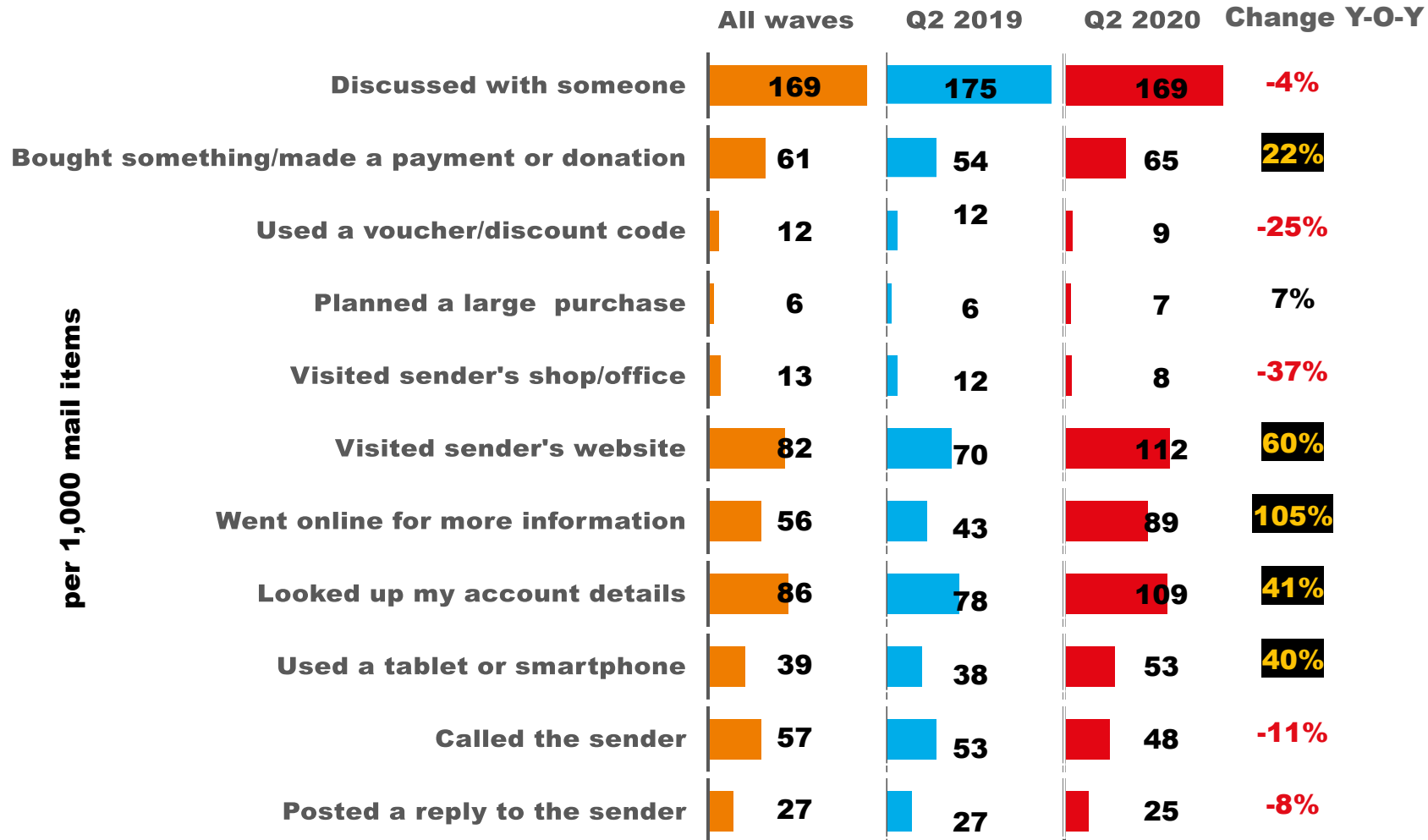


164 out of 1,000 mail items resulted in an online behaviour in Q2 2020 – a huge increase of **70%** year-on-year.

Source: JICMAIL Q2/18 TO Q2/20 Base: All mail; All waves n = 106,588; Q2/19 n = 12,935; Q2/20 n = 7,532

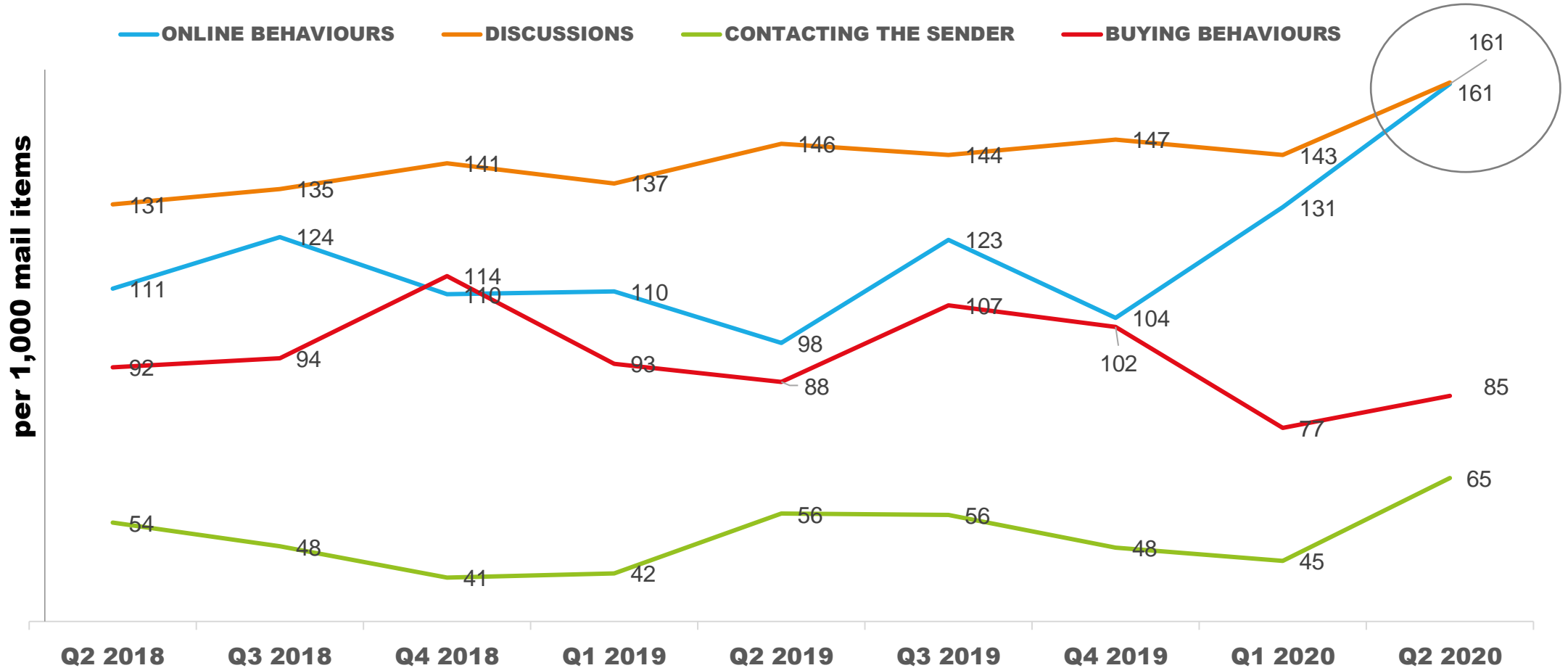


# BUSINESS MAIL WAS NOTABLY EFFECTIVE FOR DRIVING ONLINE ACTION AND BUYING BEHAVIOUR



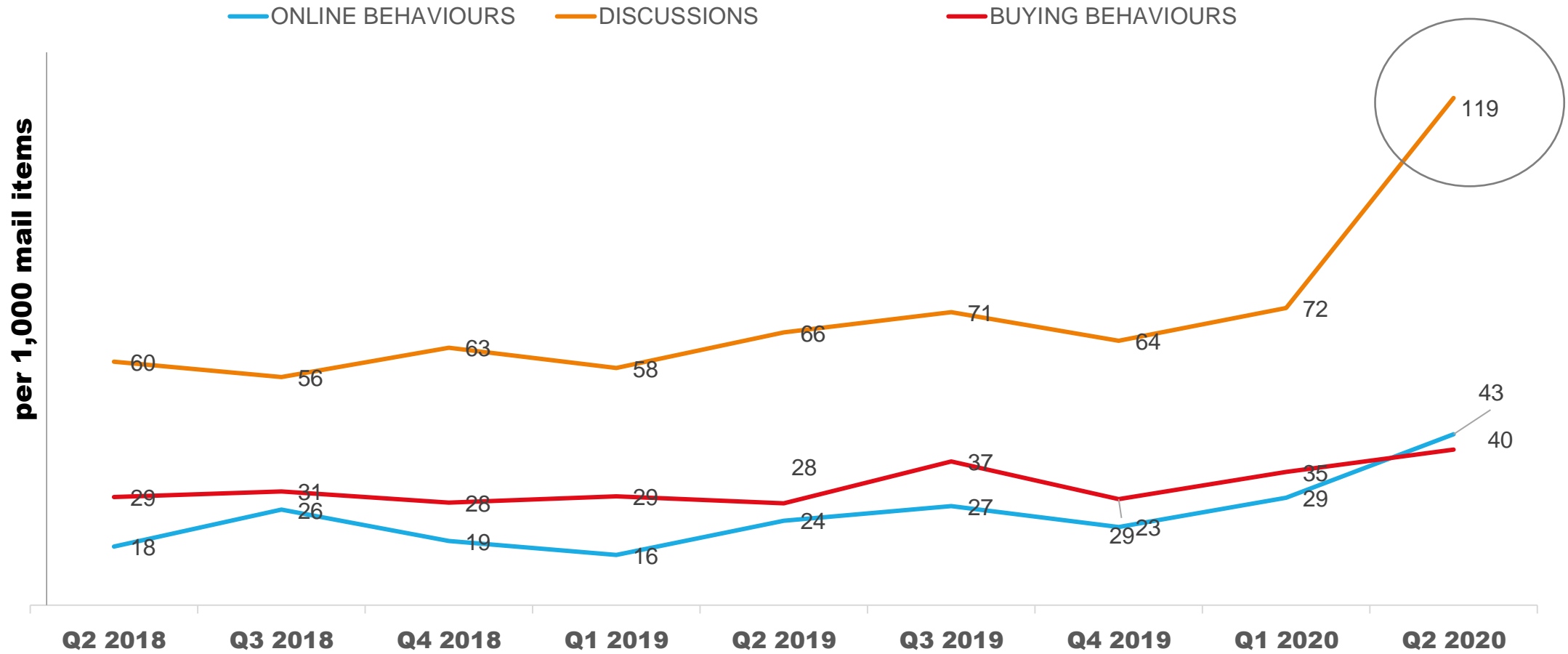
Source: JICMAIL Q2/18 TO Q2/20 Base: Business mail; All waves n = 43,212, Q2/19 n = 5,022, Q2/20 n = 4,246

# AD MAIL ALSO HAD THE NUDGE FACTOR - SEEING A SIGNIFICANT 64% SHIFT IN ONLINE BEHAVIOURS Y-O-Y



Source: JICMAIL Q2/18 TO Q2/20 Base: Addressed ad mail; All waves n = 48,516, Q2/19 n = 5,831, Q2/20 n = 3,085

# DOOR DROPS IMPRESSIVELY DROVE 80% Y-O-Y INCREASES IN ONLINE BEHAVIOURS & DISCUSSIONS



Source: JICMAIL Q2/18 TO Q2/20 Base: Door Drops; All waves n = 22,047, Q2/19 n = 2,854, Q2/20 n = 963



**NEW TOUCHPOINTS DATA HAS ALSO  
REVEALED THAT TRADITIONAL FORMS  
OF MEDIA WERE MORE TRUSTED  
DURING LOCKDOWN**

# INCREASING TRUST IN MORE ESTABLISHED MEDIA

LIKE PRINT AND AV DURING THE PANDEMIC – MAIL REMAINS 3<sup>RD</sup> MOST TRUSTED

Please indicate how much you trust what you see/hear or read on each of the following

Channel	2020 Pre-Lockdown	2020 Lockdown	% Change
National newspapers	35.2	38.2	9%
Radio	49.6	52.4	6%
Mail addressed to me	38.9	39.4	1%
Television	49	49.1	0%
Search results	42.2	38.8	-8%
Social media	11.7	10.2	-13%

Source: IPA TouchPoints 2020



**SO, WHAT CAN WE LEARN  
FROM THIS ANALYSIS?**



# 6 KEY LESSONS FROM LOCKDOWN

TO CONSIDER IN YOUR COMMUNICATION STRATEGY MOVING FORWARD

1

With more people staying at home we're seeing high levels of engagement and interaction across all mail types

2

Those brands & organisations who remained active during the pandemic would've received more bang for their buck in terms of impression delivery

3

If you're predominantly investing in digital at the moment, mail can alleviate some of the issues around online bombardment and excessive frequency

4

The highly-trusted mail medium lends itself to influencing behaviour change, delivering supportive comms and reinforcing important messages that need to cut through

5

Mail does more than elicit response, it prompts commercial action – generating household discussion and acting as a significant driver of online traffic

6

As we enter the second wave of the pandemic this autumn, now is the time to re-evaluate your in-home options to cement long-term relationships in 2021 & beyond

# TIPS TO GENERATE EVEN MORE VALUE FROM MAIL



Carefully consider your core objectives this autumn. What are you trying to achieve with other communication channels at the moment; raise awareness of a new product/service, drive online sales/donations, migrate people to online services, influence behaviour change, notify customers of important changes? Mail & door drops can help with all of that and much more.



Leverage your online data to deliver highly personalised, 1-2-1 physical communications that will resonate with the recipient. We all like a hug from time-to-time, even a metaphorical one from brands. Think about companies that have delivered empathy in their messaging throughout the crisis.



Could you be conveniently signposting people to engaging or helpful online content with a QR code? Think about the benefit of real-time performance analytics that a digital CTA provides, helping you measure response, conversion and ROI. Utilise tech to deliver connected experiences and directly attribute the effectiveness of the mail channel.



Maximise your marketing and CRM toolkit, and think multi-channel for the win. Can you identify trigger moments in the journey where customers haven't responded to email or SMS, where a mailing might prompt action? Can you convert awareness into action after a TV or social media campaign?



# THANK YOU



MarketReach

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LASTING  
IMPRESSION.**

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