

THE

LIFE

STAGES

OF

MAIL

JUNE 2016



Royal Mail

MarketReach



MAILMEN
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EXECUTIVE SUMMARY

In previous research – “The Private Life of Mail” and “This Time It’s Personal” – we examined how consumers think, feel, and interact with mail. We used a variety of research techniques – from quantitative and qualitative to ethnography and neuroscience – and found that mail’s tangible and tactile nature influences positive attitudes and drives profitable behaviours from consumers.

This time, we set out to understand how people of different ages consumed, interacted with, and felt about mail. We took this route because we had seen subtle differences in the way different age groups related to mail. These differences were linked to age, but not directly correlated.

What we wanted were insights that would help advertisers get the best from their mail, and help answer questions like:

- Would digital natives respond differently from older groups?
- Which groups are most likely to respond by phone? And which type of phone – smartphone or landline?
- How does a consumer’s experience of mail affect the way they respond?
- How is mail shared and discussed in different types of households?
- Who takes responsibility for dealing with mail?
- How do young parents, perhaps at the most momentous change point in their lives, interact with mail?

Our path led us to analyse consumers by life stage. It is a framing device that incorporates age, but allows for sensitivity to other variables that are significant to advertisers.

The findings are clear: while there are some differences, people of all life stages read, engage with, share, file, enquire further and respond to mail.

TouchPoints 6 data supports this. It shows that, on average, 26.7% of respondents across seven life stages (Fledglings, Sharers, Couples, Young Families, Older Families, Empty Nesters and Older Retirees) had bought or ordered something as a direct result of an item of mail they had received in the last 12 months.

Across a wide range of questions regarding attitudes and behaviours we found similar results. No group – regardless of their usage of technology – rejected mail as a relevant channel in their lives.

But we found important nuances that impact interactions with mail.

Fledglings – adults living in the home of their parents – have very little experience of marketing mail aimed at them. To influence them, advertisers need to provide creative-led packs that fit with their social orientation, are highly personalised, and which indicate clearly how to respond to mail (since they don't receive much mail). They should also provide a digital response mechanism.

Sharers are adults living in shared accommodation with other adults who may not be their partners. They too are focused on social status, so high presentation values and clear personalisation is important. They are also the group most likely to respond to unaddressed mail and use it to start to build relationships with brands.

People living as **Couples** with neither children nor other adults in the accommodation can be of many ages and different relationship stages. Their attitudes and behaviours regarding mail are very close to the sample index in most regards. But simple, stylish messaging and a slightly more mature tone of voice seems to be most appropriate.

Young Families have one or more children none of whom are above primary school level. They love mail. As they adapt to their new lives, mail informs, inspires and helps them choose and afford new products and services. They are more likely to respond than most other life stages and tend to do so online, often via smartphone. Keep messages easy to understand, upbeat and quick – they tend to be time poor.

Older Families have at least one child at secondary school living at home. Like younger families, they use, share and respond to mail. And as older children get more involved in decision making, mail is often displayed and used communally. Appropriate mail should reflect this.

Empty Nesters no longer have children living at home, but one or both partners may be economically active. Some feel liberated by their children leaving home, while others are more concerned about funding their future. They respect print, and are willing to spend time reading and responding to relevant mail – particularly by phone.

Older Retirees are singles or couples where neither partner has an income other than from pensions or investments. They are often living in households managed by only one person. They respond well to relevant mail, but are also the most experienced with marketing messages. Treat them, the written word, and traditional values, with appropriate respect.

In this report you'll find what differentiates these life stage groups is their attitude and response to mail, but also what they have in common: they all find it relevant, motivating and valuable.

“I found this a fascinating read as to how the different life stages consume mail. Some of it was counterintuitive and surprising.

It puts mail in context – how it’s consumed and how it sits with other channels. Everyone assumes it’s all about digital but everything is maturing and consumers are multichannel so it’s not ‘either or’ but often ‘and’.

It’s also interesting to apply some of these insights to other channels too. Since the report reminds us about proper storytelling, attention and relevance – the industry at times can be obsessed with what it wants to tell consumers and not what they want to hear.

I’ll definitely be showing this to the rest of the agency and build relevant insights into client presentations – even those who have not thought about mail.”

Ian Haworth – Global ECD



INTRODUCTION

UNDERSTANDING THE RELATIONSHIP BETWEEN AGE AND MAIL CONSUMPTION

Historically it has been the content of a medium that defines its consumption, not the medium itself.

Assuming literacy, availability and affordability, anyone could read a magazine or newspaper, watch TV, or listen to the radio.

Is digital media different? Its early adoption by Gen Xers and Millennials created a new social divide: digital natives versus digital immigrants. Would the natives be so deeply engaged with “their” channel that they would reject established, traditional media?

In fact traditional channels have always been resilient. TV hasn’t killed cinema, nor video the radio star. These traditional channels have, however, evolved and in some cases been enhanced by digitisation.

Equally, just as older generations have adopted digital media, Gen Xers and their successors have done the same with established media. It’s not a matter of one or the other, but both.

Nor has the “bricks are dead” mantra killed the High Street. Despite the ability to manage much of our lives online, physical retailers and bank branches have not died; they have evolved. They continue to offer value to consumers and generate profit. They have leveraged their strengths – tactility, face to face engagement, communal sharing of experiences and instant gratification – while integrating with the new entrants.

But will this continue to be the case? Will digital natives reject all channels except digital? And as they age, will all traditional media, including mail, wither?

In this hypothesis, the biological age of the consumer is seen as a proxy for digital engagement. It can be used as a primary factor in media selection.

Age is of course well suited to this role. Three core characteristics mean it has been used as a marketing discriminator for years.

First, it is absolute. Other things can change: an individual migrates from being single to being married; prospects turn into customers; and people move home. But their date of birth is fixed, and age can always be calculated.

Second, it is linear; people can't jump forward or backward in time. Within certain broad parameters, it is a useful tool for marketers to predict shifts in attitudes and behaviours.

Third, it is familiar. We can think rationally about it, but also – heuristically – use our own experiences to reinforce our beliefs. We use our experience, for example, to generalise the characteristics of people of different ages, and create expectations about their health, relationships and their life experiences.

So it is not difficult to transfer that thinking to marketing.

Given this, age has long been used as a media tool to target specific groups of people who are believed to share key needs, wants, characteristics and behaviours.

Its accuracy as a means of differentiating groups of people has, however, come under the spotlight. We live longer, in different family structures and our work and career patterns are different.

Age remains a key marketing tool, but making the same historical assumptions about consumers based on their age may not be so useful.

Given this context, Royal Mail MarketReach has decided to test the theory that people of different ages engage with mail in different ways.

Is it true that young digital natives don't engage with mail?

How is the growth of digital devices – particularly smartphones – affecting the use of mail?

And what is the relevance of mail, and how might that change with different generations?

This report is a summary of our explorations and resulting recommendations.

OUR APPROACH

HOW WE WENT ABOUT THIS RESEARCH

To investigate how different groups of people engage with mail we used a wide range of sources. These included data from research we had previously commissioned and reported on, as noted in this report.

We commissioned two independent research agencies to conduct new qualitative research to explore the views of individuals in different life stages, using a combination of approaches including home interviews, diaries, and cameras.

In order to understand the role of mail in the digital economy, we specifically chose users of digital technology regardless of their current life stage.

Quadrangle conducted 30 three hour depth interviews and 20 online diaries with consumers in London, Brighton and Manchester.

Trinity McQueen conducted week long immersions with 12 consumers in the North and South, comprising daily depth interviews and data capture from life-logging cameras, diaries and passive tracking of participants' mobile digital devices. They chose consumers who were all high or medium digital users.

Fieldwork took place in September and October 2015.

We also made extensive use of TGI GB data and TouchPoints 6. In this report we use TGI and TouchPoint data to show both the actual percentage of people who responded and the differences between groups. The latter is expressed using indices, where "100" refers to the average of the sample as a whole, and the index in any particular situation expresses the percentage difference from the sample as a whole.

For example, an index of "140" means the group was 40% more likely to respond in the manner described than the sample as a whole, while an index of "60" means the group was 40% less likely to respond that way than the sample as a whole.

“I found the report really useful. I especially liked the chart showing why people open mail, by life stage. Us marketers often obsess about paper weight, colour and format forgetting there are more important factors, and these factors will vary by life stage.

Also of interest was how the young and digitally savvy respond to mail and the opportunities this presents. Also how the older groups use mail and integrate technology into their lives in their response to it.”

Liz Curry – Business Planning & Processes Manager



MAIL ENGAGEMENT ACROSS AGE AND LIFE STAGE

This chapter is a short summary of some of our previous research. Its aim is to show first, how this latest report builds on our previous learnings; and second, why and how we developed our research into mail consumption across the seven life stages.

In the last few years, we've run major insight projects. These include "It's all about Mail and Email", which looked at the relationship and roles of physical and digital mail; "The Private Life of Mail" which focused on how people consumed and responded to mail and "This Time It's Personal", which looked at attributes of the mail that recipients defined as interesting and useful.

One factor stood out by its absence across our nationally representative samples: there were few significant differences between age groups.

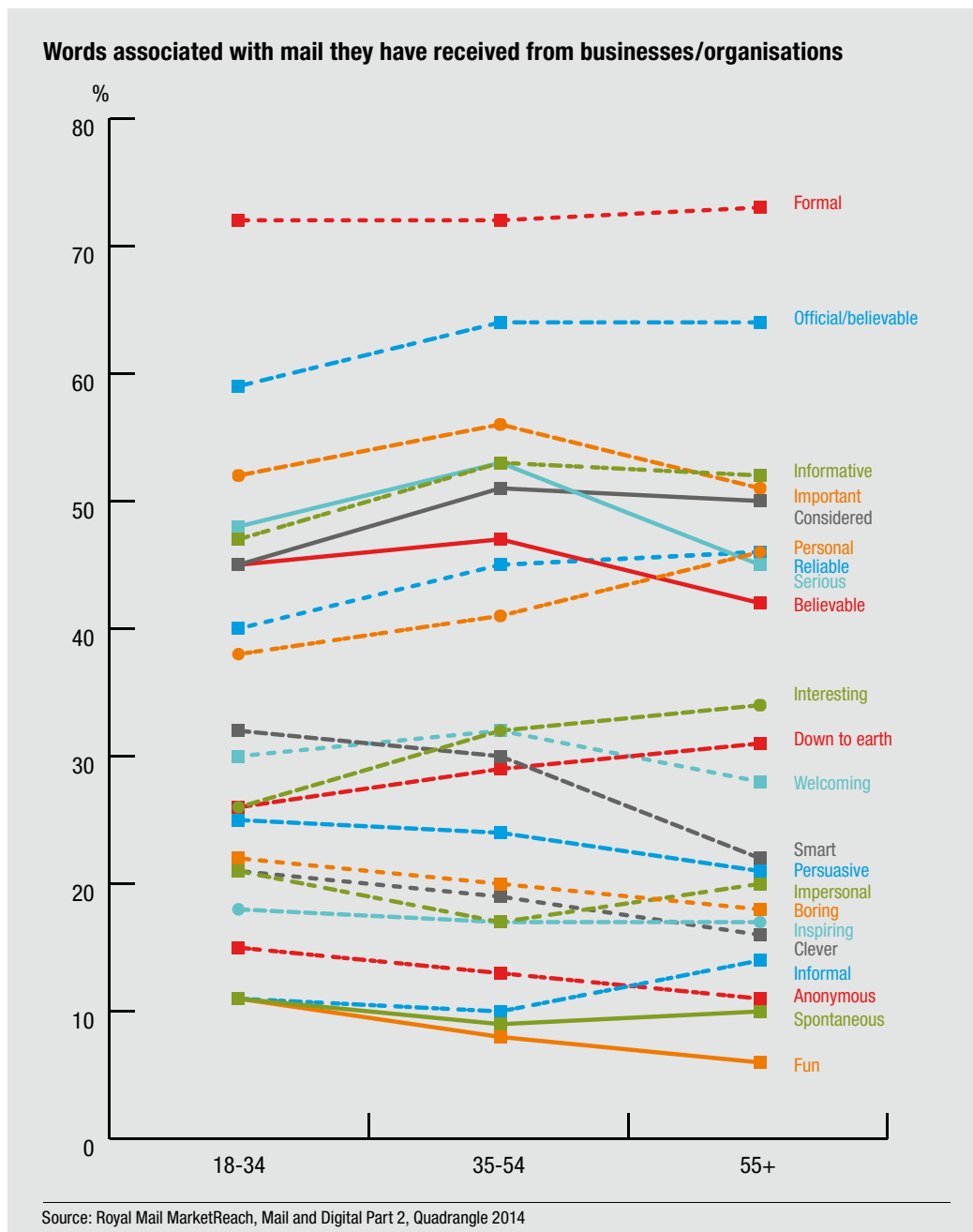
There were many similarities, however. In "This Time It's Personal", mail that was personally relevant, had a similar effect across age groups. Among other things, it provided:

- Reassurance (by informing me things are in order).
- Reminders (that I need to do something to keep things in order).
- Appreciation (by giving me something valuable or special).
- Information (by providing new or important information).
- Inspiration (by showing me things I want).
- Help to stay in control (by helping me organise, record and have evidence).

In "It's all about Mail and Email" we asked respondents from three age groups, 18–34, 35–54, and 55+, to identify words or expressions that they associated with mail.

The chart below shows the results.

Different age groups see mail the same way

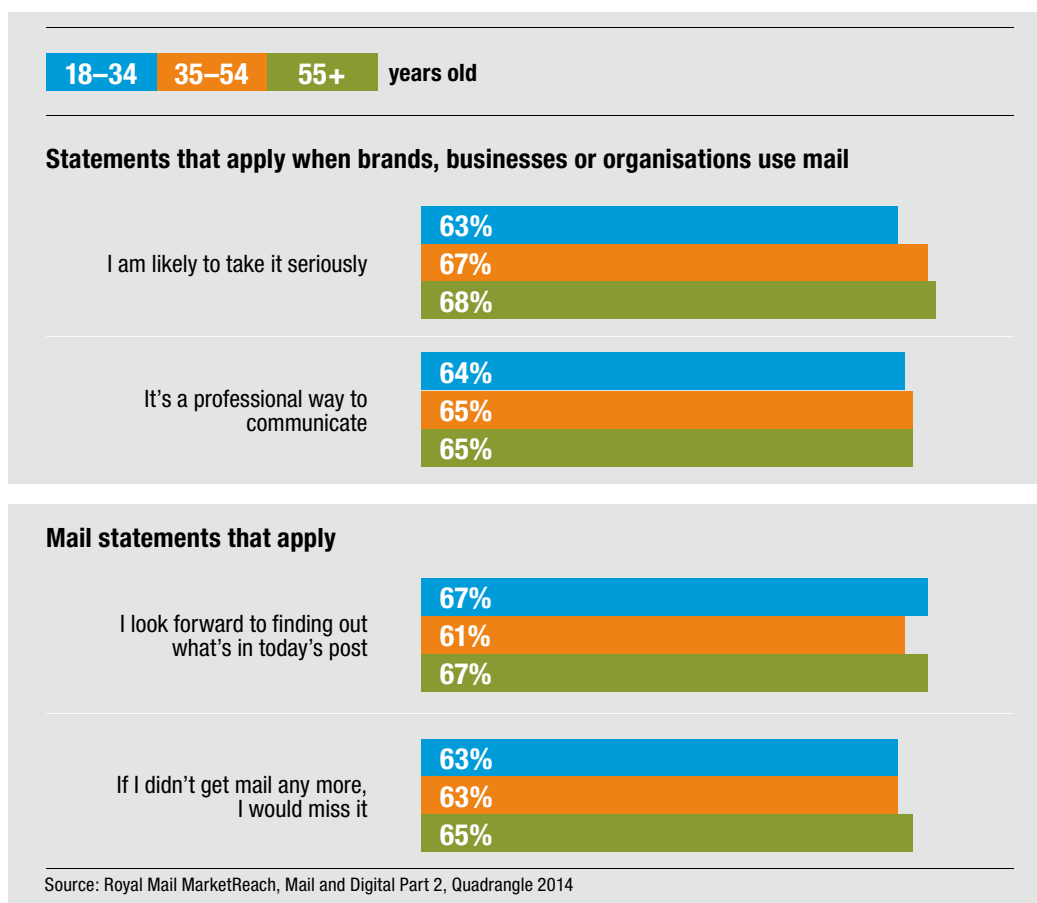


Clearly the three groups had similar perceptions of the channel: formal, personal, informative, serious, and believable.

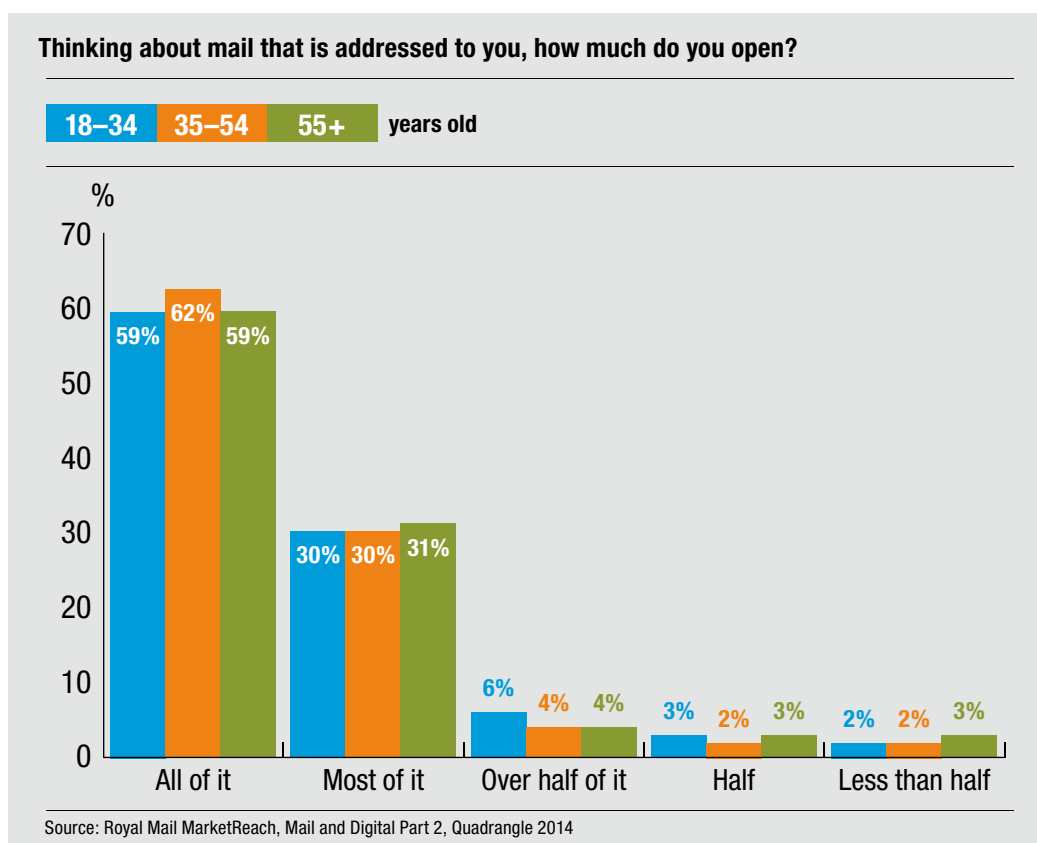
We also found, broadly consistent across the age groups, a higher propensity to open personally addressed mail than email.

Those three age groups also had similar responses to a range of statements shown on the next page.

Uniformity of response to mail by age



Proportion of addressed mail people open



Qualities consumers assign to mail

It's easy to take in the information (% agree)



It's likely to really grab my attention (% agree)



Source: Royal Mail MarketReach, Mail and Digital Part 2, Quadrangle 2014

These responses suggest that advertisers targeting younger people could improve engagement with more age appropriate creative executions. But overall, there's no suggestion younger people dismiss mail as a channel.

In quantitative research for "It's all about Mail and Email", we asked 1,000 respondents to indicate if they had taken any actions as a result of receiving mail in the last 6 months. The data showed that there were no significant differences by age.

Age is not a factor in response levels

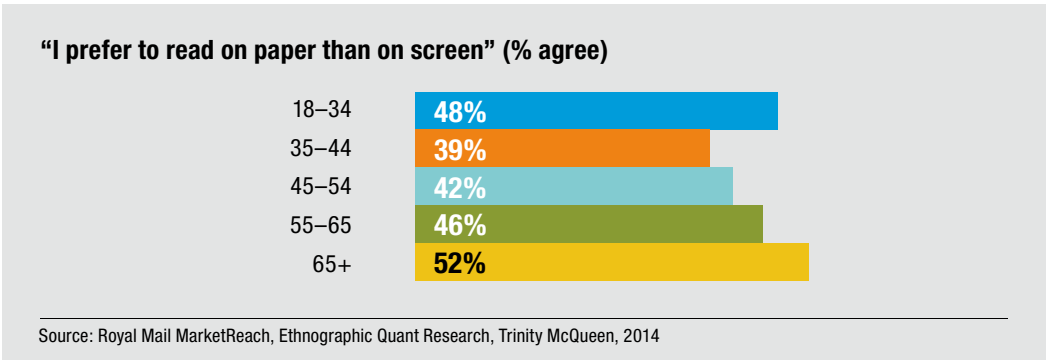
Proportion taking action in response to post over the last 6 months



Source: Royal Mail MarketReach, Mail and Digital Part 1, Quadrangle 2013

In reviewing other research, similar trends appeared.

In the “The Private Life of Mail”, for example, when asked to agree or disagree with the statement “I prefer to read on paper than on screen”, there was no clear trend that indicated an age-based bias.

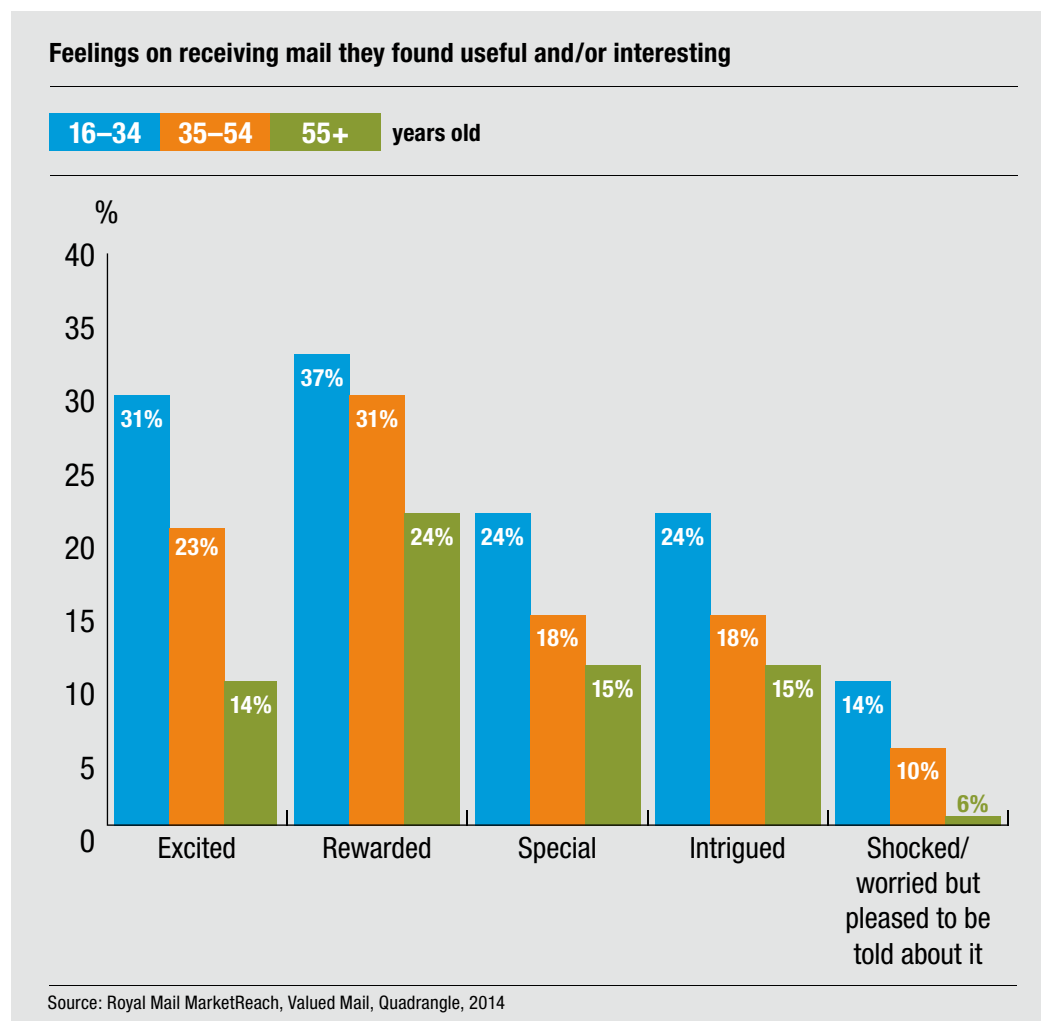


In our neuroscience research, there was no indication that age significantly affected the importance of tactility to encoding or responding to printed material. If anything, young people were more likely to register a higher level of emotional intensity to mail.

A later study, “This Time It’s Personal”, was designed to identify the attributes of mail that consumers defined as interesting and/or useful. Again it showed only minor differences between age groups in both the qualitative and quantitative fieldwork.

The most notable finding was that younger respondents tended to be more likely to indicate emotional responses to the mail they valued.

Younger respondents react emotionally to mail



Research into envelope opening rates showed that 16–34s were more likely to open all types of mail than those in the 55+ group – whether the envelope was blank, coloured or obviously marketing mail – if it was perceived to be relevant¹.

Trinity McQueen, which conducted the work, noted: “Higher opening amongst young people may be due to novelty or less developed rules of thumb around different mail types (the exception is when an item is very obviously not aimed at them)”.

Nonetheless, the distinction between the age groups didn't indicate an age related correlation that was relevant to our objectives.

To check further, we used questions we had developed with TGI and TouchPoints for inclusion in their surveys.

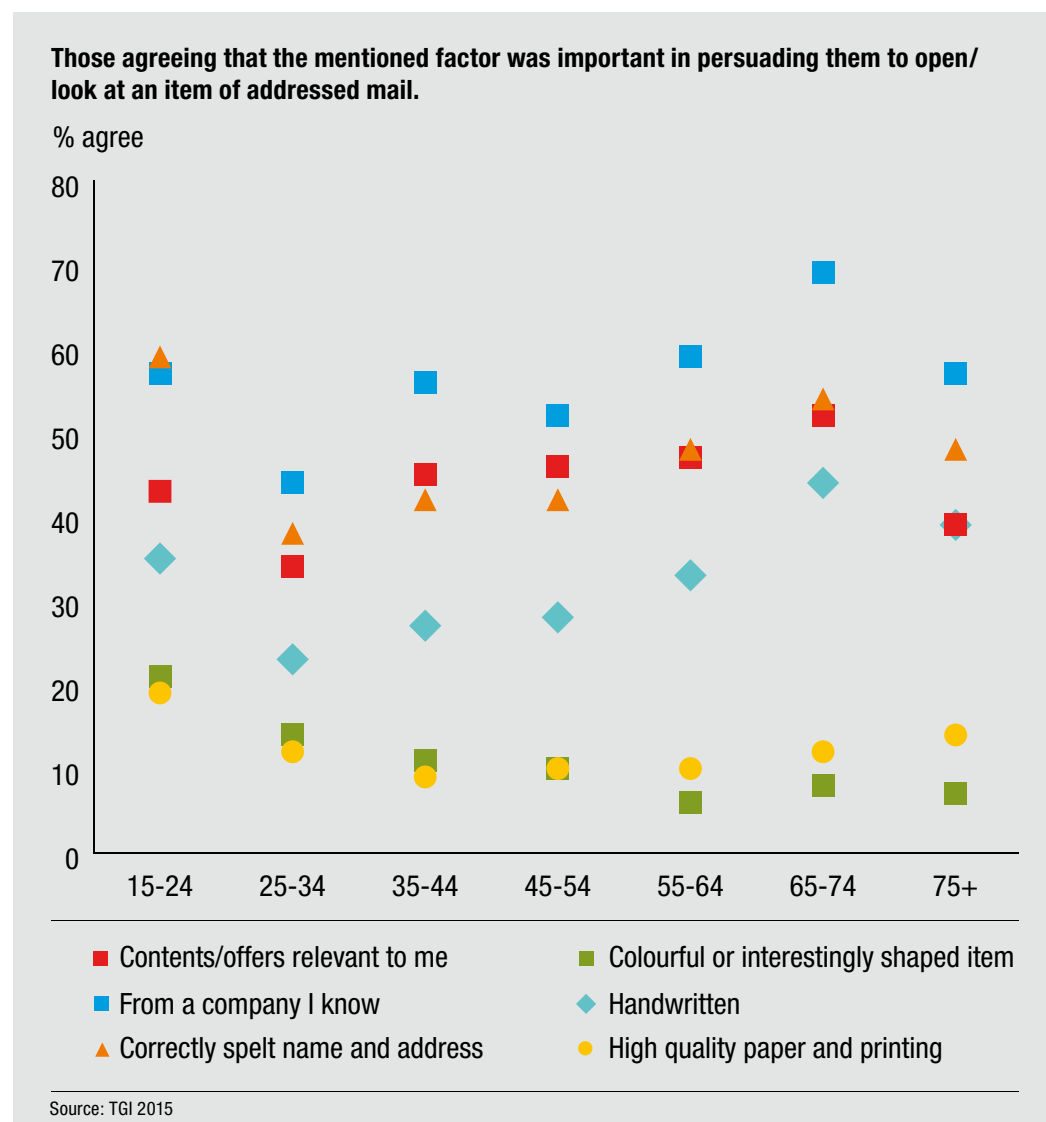
¹ Royal Mail MarketReach, Trinity McQueen, 2015.

A CLOSER LOOK

We first decided that clear and distinctive group characteristics might be more visible if we used smaller age bands.

This more granular examination did yield more distinctions between groups, but not always significant ones. However, when respondents in TGI were asked how important a number of characteristics were in persuading them to open a piece of mail, differences did appear.

Why different age groups open mail



As the chart on page 16 shows, some factors stand out:

- People under the age of 25 are slightly more motivated than others by creative and production values.
- The importance of a handwritten item increases with age (up to the age of 75).
- Those between 55 and 74 are more likely than others to be positively influenced by brand recognition.

But anomalies, particularly amongst 25–34s, suggested age was not the sole discriminating factor.

We reconsidered by looking at other evidence.

TGI asks respondents if they recall buying or ordering something as a result of receiving an item of mail in the past 12 months.

Again, we saw that there was not a smooth upward trend and that 25–44 year olds stood out.

Bought or ordered in response to addressed mail

| TGI | 15–24 | 25–34 | 35–44 | 45–54 | 55–64 | 65+ |
|---|-------|-------|-------|-------|-------|-----|
| Bought or ordered something in the last 12 months | 27% | 21% | 21% | 24% | 25% | 33% |

Source: TGI 2015

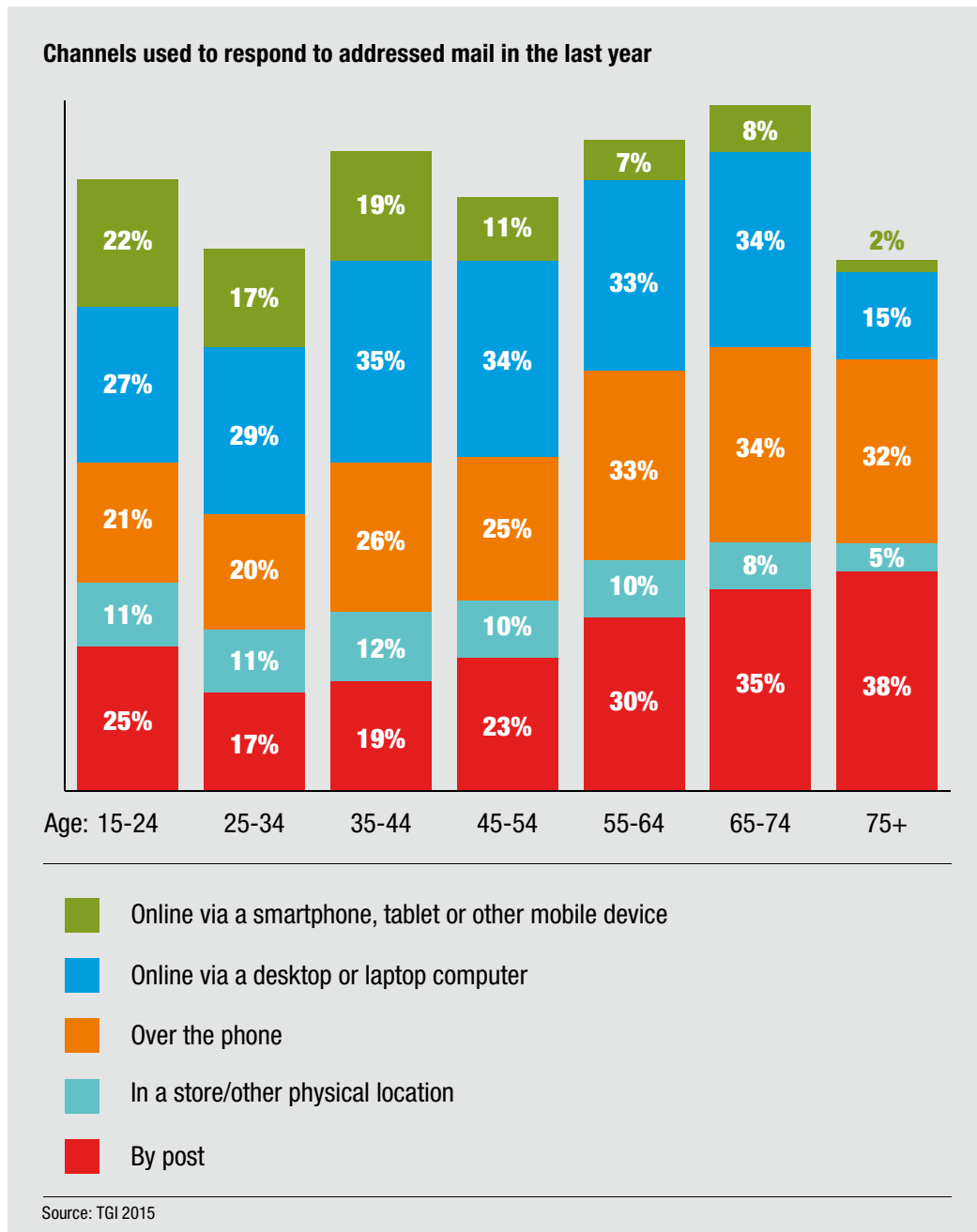
We checked to see if this had to do with the amount of mail they received. Ebiquity data tells us that 15–24 year olds and 25–34 year olds are likely to receive roughly the same amount of mail, while 35–44 year olds are likely to receive almost 2.5 times that. Given this and the percentages above, the volume of mail received wasn't an explanation for the unexpected behaviour of the 25–44 year olds.

So was it somehow related to a quirk in the penetration of technology usage? We decided to look at the technology used to respond to direct mail.

Our assumption was that the response channel used by any individual would be based on the technology that each age group was most familiar with. Thus the oldest people would be more likely to prefer post than the other groups; the older middle-aged would be more likely to prefer the phone; the younger middle-aged would prefer PCs or laptops, and the youngest adults would – we assumed – stand out as the group who were most likely to prefer mobile devices.

We explored this using TGI.

Does age determine method of response to mail?



Some of what we assumed was proven:

- The use of post to respond to direct mail rose in a gentle curve from the age of 25 to 75+.
- 55+ year olds were more likely to respond by phone.
- Under 45 year olds are more likely to respond via smartphone or tablet or other mobile device.

But this also raised some more questions.

Why, for example, were respondents aged 65–74 almost as likely to respond by PC as those aged 35–44?

And why was the group aged 25–34 out of line with other groups in terms of response levels?

After consideration, we concluded:

- There were subtle differences in engagement with mail that, while minor, were relevant to explore and report.
- These differences were age related, but not directly correlated.

We needed a more effective tool than age to understand the variations.

After much thought and initial desk research, we decided to use a life stage filter. Unlike age, there are many different life stage models.

We chose the seven life stage groups model for two principal reasons: first, because our initial research showed us that the way people interacted with mail was driven less by age than by factors such as whether they lived with family, friends, partners and children; and second, the life-stage model covers a large majority - 87% - of the UK population.

This meant that we could be both inclusive and sensitive to differences, but also look at the way in-home dynamics had a bearing on the consumption of, and response to, mail.

Of course, there are some groups who do not fit neatly into the life stage models, including those who live alone or those who live in multi-generation households.

A BETTER WAY TO MEASURE: LIFE STAGE ANALYSIS

We chose seven different life stages:

- **Fledglings**, or young adults still living with their parents.
- **Sharers**, or adults living in shared accommodation, at least one of whom was not in a relationship with the other(s).
- **Couples**, people living as partners with no one else in the accommodation.
- **Young Families** with one or more children living at home – none of which are above primary school level.
- **Older Families**, or adult(s) living with a child/children of whom at least one is in secondary school or further education.
- **Empty Nesters**, defined as either one or two adults living as partners whose children have left home, and with at least one still earning income through employment.
- **Older Retirees**, either one or two adults living as partners, financially dependent on pension or interest income only.

Using TouchPoints 6, TGI and proprietary qualitative research, we examined how each stage thought about mail, engaged with it and responded to it. The detailed TGI life stage definitions are listed in the appendix.

From these observations, we have developed insights and tips that advertisers can use to develop and assess direct mail relevant for each group. Our findings and conclusions are detailed in the next chapter.

Before diving into the detail of the differences, remember the commonalities: (1) consumers in all life stages read, share, store, follow up and respond to mail; and (2) there are no groups that cannot be reached or influenced by mail.

The table below shows clearly that while there are fluctuations and trends in the percentages. Most are within a 20-index point margin of an index of 100 (the average) for the entire sample.

Mail response by life stage. More in common than not

| Response to addressed mail by life stage | | | | | | | | |
|--|-------|------------|---------|---------|----------------|----------------|---------------|----------------|
| | Total | Fledglings | Sharers | Couples | Young Families | Older Families | Empty Nesters | Older Retirees |
| Bought or ordered | 26.7% | 23.3% | 21.7% | 25.2% | 29.6% | 26.9% | 25.8% | 31.7% |
| Kept for reference | 36.7% | 31.3% | 32.0% | 35.2% | 37.2% | 39.4% | 37.2% | 43.2% |
| Passed on | 12.6% | 16.7% | 14.0% | 13.2% | 14.8% | 13.6% | 10.7% | 10.3% |
| Visited store | 21.4% | 17.4% | 17.9% | 19.7% | 23.1% | 23.5% | 22.3% | 23.4% |
| Requested info by phone | 14.8% | 14.1% | 9.2% | 13.7% | 16.2% | 16.4% | 14.7% | 17.5% |
| Requested info online | 12.9% | 13.8% | 10.3% | 14.1% | 16.0% | 14.7% | 10.9% | 8.13% |
| Used a voucher | 49.2% | 38.0% | 37.4% | 45.8% | 52.7% | 51.9% | 51.0% | 51.0% |
| Renewed subscription | 25.7% | 14.8% | 17.3% | 20.9% | 24.0% | 26.0% | 32.2% | 34.9% |
| Tried a new product | 11.8% | 12.0% | 9.9% | 12.2% | 13.3% | 12.9% | 9.8% | 9.6% |

Source: TouchPoints 6, 2015

“In mail we have a channel that carries massive strengths across all ages. ‘Personal, formal, informative and believable’ – these are strong positives regardless of age.

However, in Fledglings mail is massively powerful as their world is predominantly fast paced and fairly disposable. Think Snapchat, Twitter, Groupon. What standout you can achieve with messages to this audience! It contrasts to the majority of their interactions and the right messages can carry real weight in this environment for them.”

Victoria Fox – CEO



MAIL CONSUMPTION THROUGH THE LIFE STAGES

“It’s easy to assume that because a brand’s customers are highly digitally active that digital channels are the way to reach them, but this report tells us that mail can really stand out for this audience since they don’t get much. Mailing Fledglings could give a competitive advantage and this is something I’m keen to explore with my clients.

And then we see other clients in the FMCG sector with products historically aimed at older audiences, wanting to reposition themselves for younger audiences. This report tells me that there’s a great opportunity to do this with mail, which they will see as innovative. It’s also a great way to make a product tangible.

I think this insight will really help us in conversations with clients. Yes, we live in a digital world, and digital channels are great but they can work much harder when mail is included in the mix and especially when that mail is highly targeted and personal. Thinking about audiences by life stage is really helpful.”

Marius Bartsch – Integrated Partner


J. WALTER THOMPSON WORLDWIDE

FLEDGLINGS

c. 3 million in GB

ABOUT ME

52%

AGE 18-24

17%

PLAN TO MOVE OUT OF
THEIR PARENTS HOME IN
THE NEXT 12 MONTHS



MAIL AND ME

23%

BOUGHT OR ORDERED
SOMETHING AS A RESULT OF
RECEIVING ADDRESSED DIRECT
MAIL IN THE LAST 12 MONTHS

38%

AGREE THEY ARE MORE
LIKELY TO LOOK AT MAIL
PRINTED ON HIGH QUALITY
MATERIALS



ATTITUDES

+32%*

MORE LIKELY TO TRUST
INFORMATION IN PRINT
MORE THAN INFORMATION
ON THE INTERNET

+56%*

MORE LIKELY TO AGREE
MONEY IS THE BEST
MEASURE OF SUCCESS

2x*

MORE LIKELY TO LIKE
GOING TO TRENDY PLACES
TO EAT AND DRINK



* = index percentage

Source: TGI, TouchPoints 2015

Fledglings are young adults living at home after they have finished school or tertiary education rather than in shared accommodation (see next section on Sharers). Some are known as the “boomerang” generation, and they choose to live at home with their parents for a variety of reasons.

These may be cultural, practical or financial – such as the cost or availability of accommodation, the carry-over of student debt – or a combination of one or more reasons that outweigh the attraction of independent living.

Fledglings generally have far fewer responsibilities than other age groups. Unless they are carers, they have little experience of utilities suppliers, budgeting for the household food shopping, or paying the rent or mortgage.

It is easy to characterise Fledglings as essentially self-centric. Data from TGI shows that they are more likely than the average of our life stages to agree with statements such as “I am willing to sacrifice time with my family in order to get ahead”, and “To me, being beautiful means asserting personality, my difference”.

In fact this “me-ness” is not introversion but the desire to position themselves within their social world – their social status. The “selfie generation” is looking to establish, maintain, and exert itself or themselves in terms of others. Accordingly, Fledglings are more likely than the norm to agree to statements such as “I like to go to trendy places to eat and drink”, “I am more influenced by my friends these days” and “I feel the need to check social networking sites everyday”.

Given this need for social interaction, digital communication tools – particularly smartphones – are central to their lives. Not surprisingly, Fledglings spend more time online than all other media combined.

It's easy to assume that as digital natives engrossed in social activities, Fledglings don't engage with mail.

TouchPoints analysis indicates they spend less time with the mail each day (an average of 10 minutes, compared with 16 minutes for the sample as a whole) than any other group.

Figures from Ebiquity suggest many advertisers think so; in 2015, 16–24 year olds received substantially less mail than other age groups, and most of our Fledglings are in this age bracket. TouchPoints confirms this: when asked to indicate the sectors that had mailed them in the last four weeks from an extensive list, they recorded reading less mail from any sector than the average, and were more likely to say they received mail from “none of these” in the last four weeks.

LEAVE IT TO THE PARENTS

Living in their family home, it is not surprising that Fledglings also take less responsibility for the mail that comes into the dwelling than other groups. They are the least likely of any life stage to say that they personally have responsibility for opening the mail, checking statements, paying bills or filing paperwork.

Only 47.2% agreed with the statement “Opening the post is part of my daily household routine” (index 71) and 42.8% agreed with the statement “Unaddressed mail often gets left out for someone else in the household to have a look at” (index 182).

They see dealing with the mail as a parental task. Their mail sharing behaviour reinforces this: even when they open a piece of addressed mail, they are far more likely than any other group to pass most of it or all of it to someone else.

But is this a circular argument? Could the fact that Fledglings are sent less mail be the reason that they spend less time with it?

FLEDGLINGS LIKE PRINT, AND MAIL TOO

Their perceptions of print as a whole are no different from the other groups. There were no outstanding differences in neurology, associations with mail, or preferences about reading printed material rather than on screen. And they accept the value of printed material: 65.8% of them agreed with the statement “I am more likely to remember to use a voucher if I have a physical copy of it to carry around”.

They are also appreciative of prints inherent creative qualities. Almost half (47.8%/index 110) agreed that “The quality of printing and material in a piece of mail tells me something about the organisation that has sent it.” And 38% of them (index 116) agreed with the statement “I am more likely to look at mail that is printed on high quality materials”.

In fact TouchPoints indicates that Fledglings are generally positive towards mail. They are more likely than the population as a whole to welcome it – 21.4% agreed with this (index 118) – and to find it memorable.

More than a quarter (25.2%/index 123) agreed that they trust the mail/post they receive through the door, and 21.4% (index 132) agree they are “more likely to trust mail than information they find on the internet”.

RESPONDING DIGITALLY

They are, however, more likely than the oldest groups to respond digitally than by post or phone. TGI notes that they are also more likely than the sample as a whole to respond by SMS, although the sample size for this activity is very small (3.1%).

They are not, however, radically different from the majority of the sample in their use of smartphones to respond to post. Only 8.7% of Fledglings responded to direct mail online via a smartphone or tablet, indexing at 116.

We could conclude therefore that Fledglings are not dismissive of mail at all; they are simply inexperienced in dealing with it. This means that they are the group least likely to feel confident about responding to mail. For example, they are much less likely than the sample as a whole to associate the statement “Easy to respond to” with mail.

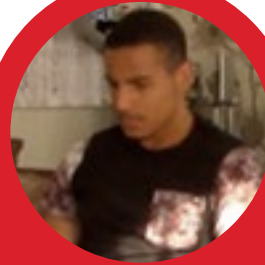
In short, they don’t get much mail, and they tend not to have responsibility for its content. This has created a cohort that simply doesn’t expect mail, and isn’t yet confident in dealing with it. But they will respond to personal, relevant, creatively affirming post that helps them understand what to do next.

Given the low volume of direct mail aimed at this group and the warmth they have for it, advertisers who use mail that recognises and responds to their specific needs have a significant opportunity.

CONFIRMATION FROM QUALITATIVE RESEARCH

Our qualitative research confirmed many of these findings.

As expected, Fledglings claimed to receive very little mail – and most of that was statements or account updates. But after keeping a diary for a week in which they recorded their mail experiences, they were surprised to discover how much marketing mail they actually received and responded to.



Daniel, for example, received and took action in the course of one week to:

- A statement mailing from his bank which he checked on his app and then filed in a shoebox under his bed.
- A catalogue from Sports Direct which he shared with members of his football team and used to order kit for both himself and others online.
- Subway vouchers collected and left out by his mother. Daniel put them in his wallet and redeemed them.

Daniel's use of unaddressed vouchers and his sharing of the catalogue illustrate how items of mail can have a much higher readership than just one person.

“

I have started getting stuff through the post since I got a bank account and running a sports team. It actually helps to have stuff to refer to so I don't have to keep looking at my phone and using data.

”



Lauren demonstrated similar behaviour. She received a catalogue from Capital Hair and Beauty which she shared not only with her friends but also her Nan, who tends to purchase in store.

“

I know my Nan likes a specific brand... If that's on offer I pass her the booklet and she uses my card and goes up there... And for my friends, if there are certain nail varnishes I know they like I'll tell them.

”

Conversely, Lauren happily browsed through her mother's catalogues from Next, H&M, and M&S as well as her own catalogue from ASOS.

But Lauren also received a renewal letter from her car insurer which triggered her to act. She's likely to stay with her current supplier: she knows that after three years with one company she might get a better deal with someone else, but she wants to give her current supplier the chance to match any discount:

“

I'd have a look around. If there was anything I would call them because I have been with them for quite a while, and it is nice sometimes just to stay with the same company. I've never had any problems with them.

”

The letter had helped remind her of the positive aspects of the brand.

Sam, who lives with his parents in London, also gets very little addressed mail. He only received bank statements during the week his diary covered. But he was likely to pick up magazines and catalogues in his house on subjects he has interest in, and he will keep hold of these to read and refer back to at a future date. These could inspire him to use retail shops.

Other examples included brochures of his favourite resort Val Thorens, the Geographical Society's magazine, and promotional material for his favourite clubs.

These examples show that addressed or unaddressed, relevant and interesting mail benefits from being passed on, shared or displayed.

Another of our Fledglings had the following to say.



These [mail] items... stay on the kitchen table until everyone's finished with them. If it's an important or interesting piece of mail it comes to my bedroom on top of my chest of drawers, if it's just bits of advertising etc. it goes on the kitchen table.

Sam, Manchester



TIPS FOR FLEDGLINGS

Make it clear that this item is for them not their parents

Mail that is personalised, and uses an age appropriate style and tone of voice is more likely to be opened.

Make it clear what to do next and how

Fledglings are relatively inexperienced with mail so, without being patronising, help them use it by guiding them through any next steps.

Make it share worthy

For Fledglings, sharing is linked to social status. The design, tone and style of mail should encourage sharing.

Make it easy to respond to by all channels

Ease of digital response is critical to Fledglings. Highlight the response mechanisms, and offer as many options as possible for different devices.

Leverage tangibility

Fledglings are responsive to image and brand. Imagery (including brand imagery) that is visible and browse-able is more likely to be savoured and shared.

SHARERS

c. 1.9 million in GB

ABOUT ME

51%

AGE 18-24



MAIL AND ME

22%

BOUGHT OR ORDERED
SOMETHING AS A RESULT
OF RECEIVING DIRECT MAIL
IN THE LAST 12 MONTHS

+75%*

MORE LIKELY TO BUY OR
ORDER SOMETHING AS A
RESULT OF DOOR DROPS

2x*

MORE LIKELY TO HAVE
PROVIDED PERSONAL OR
HOUSEHOLD INFORMATION
TO A COMPANY AS A
RESULT OF A DOOR DROP

+24%*

MORE LIKELY TO HAVE TALKED
TO PEOPLE IN THEIR HOUSEHOLD
ABOUT AN UNADDRESSED ITEM
OF MAIL (THEY RECEIVED)

+49%*

MORE LIKELY TO FEEL REASSURED
ABOUT THE SENDER'S SERVICE OR
PRODUCT AS A RESULT OF MAIL

+45%*

MORE LIKELY TO FIND MAIL
MEMORABLE



ATTITUDES

2x*

MORE LIKELY TO
BE MORE
INFLUENCED BY
THEIR FRIENDS
THESE DAYS

* = index percentage
Source: TGI, TouchPoints 2015

“ Anyone who stereotyped mail as only for older or affluent audiences will see their thinking changed. Mail has relevance across all life stages. In fact, if you have a letterbox mail can have purpose - it’s just a question of identifying the most relevant point in the journey for a personal, tactile experience.

I especially identified with the behaviour of the sharers taking mail out of the home to deal with on the train or work. So true!”

Nick Myers – Planning Director



Sharers live in flats or homes with others, sharing the costs involved. For many, it is a typical first step when starting tertiary education or a first job.

Money may be tight, and thus shared accommodation the easiest way to gain independence. It provides a social environment that eases the path from the security of the family into the wider world.

This often means taking on new responsibilities. It requires them to learn many new life skills, and begin to establish new relationships with commercial organisations.

Sharers are the group most likely to be in a fairly constant state of change. They are more likely than others to say they are “about to rent a flat”, be “about to change jobs”, careers, or develop new life skills.

Given the focus on higher education in the last decades, Sharers tend to be well educated: 52% have further education. Like Fledglings, their primary focus is how they fit in with their social groups.

GETTING USED TO BEING RESPONSIBLE

Sharers interact with mail, but are still reluctant to take responsibility for it. They are much less likely than the norm to say that they are the person who usually opens the mail, checks statements, pays bills, or files material, but they are far more likely than Fledglings to say they take turns undertaking these tasks.

Like Fledglings, Sharers report receiving low levels of addressed mail. Many utilities companies may send material addressed to the landlord or only one of the room mates, so they see few bills or statements.

They may have asked their parents to hold on to any addressed mail sent to them at home, and only inform the senders that they have moved address some time afterwards. It will take time for them to register to vote or for local services, much less participate in a census. So they may still be overlooked by many organisations.

According to TGI, both Fledglings and Sharers index highly on spending a lot on clothes, wanting to go to trendy places to eat and drink, wanting to stand out in a crowd and being more influenced by friends. In fact, 57.1% of them (index 187) agree with the statement “I often compare what I do with others in my social circle”. But they may lack the resources: 30% say they find it difficult or very difficult on their present income.

Although more than one in five Sharers bought or ordered something as a result of addressed direct mail in the last 12 months (21.7%), this is the lowest penetration of any of our groups.

LOWER PROPENSITY TO RESPOND TO MAIL

TouchPoints questions about direct mail show that Sharers are among the least likely to act in response to addressed mail. Why? Is this the digital effect? Or is it driven by their financial circumstances?

It doesn't appear to be a problem with mail itself; like Fledglings, Sharers are more likely than the norm to find mail memorable (13.2%/index 145) and to trust printed material more than the internet (18.5%/index 114). And they are much more likely than the Fledglings to say they personally open the post (45.1% of Sharers versus 32.4% of Fledglings).

They are also more likely than any other group to feel reassured about the product or service the sender of addressed advertising mail provides: 11.4% of Sharers agreed with this, an index of 149. And as a result of receiving transactional mail, 9.5% said they felt they understood the sender better than before (indexing at 158 – the highest of all groups).

It seems likely that they are using mail to begin to decide what brands they will use now or later on in life. So why don't they respond to addressed mail?

UNADDRESSED MAIL SCORES HIGH WITH SHARERS

Sharers are, it turns out, the heaviest users of unaddressed mail, indexing well above the norm. With 8.2% of them saying they bought or ordered something as a result of receiving unaddressed mail, they index at 175. Nine per cent said they tried a new product (index 148), 19.8% said they used a voucher or coupon delivered by this method (index 141), and 4.4% provided personal or household information to a company or service provider (index 209).

And they share mail, addressed and unaddressed. Of this group, 14% pass their addressed mail on to someone else, indexing at 111. But 14% also passed their unaddressed mail on, indexing at a much higher 160.

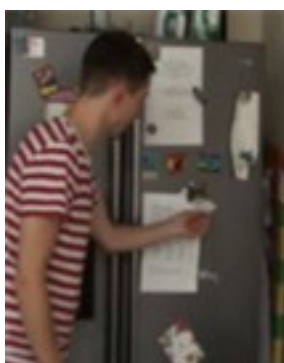
So the relatively low response rates to addressed mail are countered by a comparatively high response rate to unaddressed mail.

Part of the reason for this may be that like Fledglings, they simply don't receive much addressed mail. As noted, just over half are 18–24 year olds – the group who receive the least amount of mail.

It appears that not only are they on a learning curve, but so too are advertisers. As there may be limited data about what they like or dislike, advertisers are less likely to send them addressed post at first.

Instead, unaddressed post (and their responses) can help identify and build insight based relationships for the future.

COMMUNAL VERSUS ADDRESSED MAIL



The qualitative research indicated that in shared households, space is often at a premium, demanding that mail be dealt with fairly efficiently. Transactional mail – bills, statements, account information and the like – and some addressed direct mail is treated with respect and sorted into piles for each other's attention.

For example, in one instance all mail that comes into the house is placed on the table in the living room in three piles – mail for individuals, house mail and other items including flyers or small brochures. People usually interact with the communal mail only in the communal space – it will often live here for a few days and then be put into the recycling. And they may make a joint decision on how to respond.

The household of one respondent in shared accommodation in Brighton recently received a good-quality flyer from Deliveroo. The Sharers liked the idea of Deliveroo, and posted it on the fridge for everyone to see.

Appreciated or relevant items can be displayed for some time in communal space.



John appreciates his mailings from his musician's membership organisation and Chelsea Football Club. Of the latter he said:



I do like getting the Chelsea magazine. It's glossy and does have some interesting articles in it. It's quite substantial. So I tend to keep it around the living room for a week or two.



This appreciation of the style and aesthetics of a mailing can extend to appreciation of the values of the company as well.

Another Sharer, speaking of a brochure from The Herschel Supply Company brand, said:



They sent a really nice glossy visuals catalogue that I kept since I liked the photography and ethos of the company... it was nice to see a company take so much care and attention to detail in promoting their brand.



One of the factors that began to emerge – and which we would see in many of the life stages – was mail being taken out of the home to be dealt with during “dead time” e.g. commuting.

Noel, for example, lives in Brighton but commutes to Gatwick by train each day. He takes his mail with him.



My letter and newsletter from Plan charity came three weeks ago. I didn't open for a week as was too busy. Then it was in my work bag for a few days then I opened it on the train the next day and then have kept it in my bedroom by the side of the bed.



Sharers can be touched by print, including mail, as they start to give their permission to be marketed to. But unaddressed mail should be seen as a powerful tool as they develop their relationships with companies, organisations, and other advertisers.

TIPS FOR SHARERS

Create personalisation that stands out on the doormat

Sharers have a strong sense of identity, and often live in multi-occupant accommodation. Visual, personalised mail is most likely to stand out and be opened.

Reflect the life they want to live

Sharers are more conscious of social status, tend to be social and open to new experiences that reflect well on them. Creative, well designed, mail that matches these characteristics is more likely to cut through and build brand equity.

Value is a powerful message for them

Sharers like to spend money on clothes and going out. Mail that offers them value, such as coupons for new products or experiences, is likely to be well received. Clearly communicate the value proposition.

Make mail easy to take out of the home

Mail that is easy to take out of the home and deal with – including responding digitally – is likely to be considered and responded to.

Consider door drops

As young adults, Sharers are only beginning to show up on databases. But they respond to unaddressed mail, which can be used effectively for multi-person households and, if they have a response mechanism, to build profiles.

COUPLES

c. 6.4 million in GB

ABOUT ME

COUPLES SPAN A WIDE
RANGE OF AGES

47%

AGE 35-54

36%

AGE 18-34

MAIL AND ME

14%

PASSED ON AN ITEM OF
MAIL TO SOMEONE ELSE

16%

REQUESTED MORE
INFORMATION ONLINE

22%

VISITED A STORE AS A
RESULT OF RECEIVING
ADDRESSED MAIL IN THE
LAST 12 MONTHS

13%

TRIED A NEW PRODUCT
OR SERVICE

26%

BOUGHT OR ORDERED
SOMETHING



“This report serves as a great reminder and refresher for many of the behaviours we recognise and understand but is substantiated in fact and new insight.

Examining by life stage can help add another layer to thinking behind data, planning and messaging.”

Laura Ramsell – Head of Tesco Clubcard Brand and Proposition



On one level, it's easy to define Couples: two people living together as partners with no children or other people in the accommodation.

But it's far harder to define them in other ways. From 18 to 54 they are more or less evenly distributed across the age ranges. We can't know what commitment they have to each other, and thus what level of planning for the future they are making.

Some are in the early stages of a relationship; some may have committed to each other and be considering having children; and others may have lived together for many years and have no intention to have a family. Ultimately, this breadth means there are somewhat fewer identifiable, unique characteristics to the group.

Couples are often socially focused: they are not, or not yet, absorbed by their own children. They are still more interested in their friends than other groups, and spend money on clothes and going out.

In terms of dealing with mail they – like the Sharers – are more likely than the sample as a whole to say they don't know who takes responsibility for managing the mail. For example, 53% say that they usually open the post – far higher than the 45% of Sharers but – indexing at 91 – lower than the sample as a whole.

The figures are similar for taking responsibility for checking statements, paying bills, or filing paperwork. In essence they take mail and its contents more seriously than Sharers, but less than Young and Older Families.

Across most of the mail focused questions covered in TouchPoints, the responses of this group are close to the norm. They receive a middling amount, spend a middling amount of time on it, and – particularly in response to addressed mail – respond in proportions very similar to the average of the sample. They have more positive responses to unaddressed mail than the sample as a whole, but at a lower level than Sharers.

But in the context of the other life stages, their responses overall show a level of engagement with addressed mail that is higher than that of Sharers, and yet lower than it will be with the life stages such as Families. They bridge the gap.

The table below illustrates a few of these:

Which of the following have you done in response to addressed mail/post you received in the past 12 months?

| | | Total | Shared House | Couples only | Young Family |
|---|-------|-------|--------------|--------------|--------------|
| Bought or ordered something | % | 26.7% | 21.7% | 26.0% | 29.6% |
| | Index | 100 | 81 | 98 | 111 |
| Made an enquiry/request for more information by phone | % | 14.8% | 9.2% | 14.9% | 16.2% |
| | Index | 100 | 62 | 101 | 110 |
| Visited a store | % | 21.4% | 17.9% | 21.5% | 23.1% |
| | Index | 100 | 84 | 101 | 108 |
| Paid more attention to an advert | % | 9.3% | 6.8% | 9.3% | 11.1% |
| | Index | 100 | 73 | 100 | 120 |
| Referred to information from mail whilst online | % | 12.4% | 9.7% | 12.2% | 15.2% |
| | Index | 100 | 78 | 99 | 123 |

Source: TGI 2015

LIVING SPACE DICTATES MAIL'S JOURNEY IN THE HOME

Qualitative research helps us understand the nuances of how members of this group responded to mail differently from others.

We noticed that Couples tended to live in smaller premises: and for these people, mail items took a fairly short journey around the home.



Danielle's approach is quite organised. Mail is brought directly to the coffee table in the lounge, examined and dealt with immediately – discarded if irrelevant and stored briefly on a bottom shelf if it needs to be dealt with.

Financial statements and insurance schedules were quickly filed in the home office; there was little on display. Their house was immaculate, and in the relatively small space they chose to live in an uncluttered environment. It felt as if in deciding to live together, they had chosen to begin to take their living space very seriously by keeping it uncluttered.

But this “adulthood” did not mean that they had lost all youthful traits. Like other younger people, Danielle was happy to admit that while the channel through which she received advertising didn't matter, its relevance and look still did:



If something sparkly and new catches my eye, I'm automatically drawn to it regardless of whether it is a TV ad, an ad on Facebook or something through the post.



Danielle and her husband received only five pieces of mail in the week of the diary. One item, a Yorkshire Carnegie discount voucher, was discussed with her husband with the plan to go online and order. A Next catalogue, still on the lower shelf in the lounge, received the same treatment.

Elaine, another young woman in a couple, also likes a tidy living space.



“

We live in an apartment, we don't want clutter everywhere, so it's pretty much “sort then it's gone straightaway”... There's no “I'll come back to that later” – you either grab my attention or you don't.

”

For many, this attitude meant mail was read and assessed outside their homes – on their commute or during breaks at work. Only the items that needed to be filed or considered jointly came back to their home.

This could mean that mail was discussed with friends or colleagues at work who were at similar life stages.

“

I usually open my mail on the way to going to work. I pick up my mail and take it with me – I read it, put it in my handbag and sort it out next time I look in my handbag.

Hayley, Manchester

”



The most dramatic example was Stephen from Manchester. Like the other couples in our sample, he and his partner led active social lives. But they were older, and in a different part of this life stage. When we interviewed them they had already moved from their first smaller dwelling to a new property. Mail had a significant role to play in their new lives.

“

I received a booklet from estate agents; a property magazine, and I actually bought my house from the info that was advertised within it – off plan – and I got quite a good deal.

”

Moving into their new home, he received marketing leaflets from the development offering financial incentives if he could help sell the remaining plots. He mentioned this to his friends, two of whom made purchases.

Mail from service companies also garnered response; a flooring leaflet offering 20% discount prompted an enquiry and subsequent purchase (following wider online price comparison); and a car valet service leaflet prompted the uptake of a monthly car valet for both himself and his partner. As he was on the lookout for a new sofa, his mother passed on a voucher for John Lewis – this led to a store visit and purchase.

Clearly mail had arrived at a key trigger point, and the advertisers had benefited from it.

TIPS FOR COUPLES

Couples are focused on friends, but leading more grown-up lives

Mail should address the Couples mindset: they are socially active and focused on their relationship. Mail should reflect that they are more settled than Sharers, but looking forward to building stylish lives and enjoying new experiences.

Mail is starting to have a place in their home

Adult responsibilities to homes and partners mean mail requires more serious, shared and structured management. As they engage with their home and consider new products and services, unaddressed mail can have a significant impact.

Compact living accommodation may influence how Couples treat mail

Couples tend to live in smaller premises. Mail may therefore take a shorter journey round the home. Possible shortages of filing or storage space mean mail imagery needs to be strong to demand attention. It also means mail may be dealt with outside the home, so digital response mechanisms should be included.

Be clear about what the mail is for and what you want Couples to do with it

Lack of living space means mail is dealt with promptly. Overt messages both on the envelope and in the content will help drive attention and action, especially with the inclusion of digital response channels. Value matters to Couples, and value messages should be clearly signalled.

Door drops can play a role for local amenities and businesses

Couples are not only engaging with their home, but also their local area. Door drops by local businesses or localised operations of larger companies are likely to resonate.

YOUNG FAMILIES

c. 8.5 million in GB



MAIL AND ME

+92%*

MORE LIKELY TO HAVE
USED A MOBILE PHONE
OR TABLET TO RESPOND
TO MAIL

30%

BOUGHT OR ORDERED
SOMETHING AS A RESULT
OF RECEIVING ADDRESSED
DIRECT MAIL IN THE LAST
12 MONTHS

+23%*

MORE LIKELY TO HAVE
REFERRED TO MAIL
WHILST ONLINE

+24%*

MORE LIKELY TO GO ONLINE TO
MAKE AN ENQUIRY/REQUEST
FOR MORE INFORMATION AS A
RESULT OF RECEIVING MAIL

+37%*

MORE LIKELY TO AGREE
THAT RELEVANT MAIL CAN
CHANGE THEIR OPINION OF
A COMPANY OR BRAND

62%*

HAVE A SPECIFIC PLACE IN
THEIR HOUSE WHERE THEY
KEEP LETTERS AND VOUCHERS



ABOUT ME

69%

AGE 25-44

* = index percentage

Source: TGI, TouchPoints 2015

Few moments in life have such a fundamental impact as the birth of a first child. So much changes; there are so many new things to learn about and deal with. It comes as no surprise that the shift in attitudes and behaviours from Couples to Young Families is one of the most dramatic we observed.

The average age of first-time mothers is, according to the Office of National Statistics, just over 28, higher than ever before². They work in a wide range of jobs and, because they are older before becoming parents, are likely to have some form of higher education.

The responsibilities of parenthood mean Young Families need to connect with new types of products and services. Young Families are more likely than the sample as a whole to agree that “Product reviews have a major influence on my purchasing decisions”, but also to agree that they are “Tempted to buy products I’ve seen advertised”.

It’s no surprise that Young Families embrace mail. They begin to receive more – they start new relationships with companies, retailers, health and local community organisations – and engage with it more.

At the same time, they begin to value more both the information that mail conveys and the companies that send it to them. They appreciate that mail alerts them to new products (24.6%/index 118) agree “The mail/post I receive often alerts me to new products and services”; they like post that rewards customer loyalty (62.4%/index 116); and feel reassured about the product or service the sender provides (for addressed mail 8.8%, indexing at 115).

They are also more likely to agree that “Addressed mail can positively influence my opinion of a company or brand” and that “Relevant direct mail can change my opinion of a company or service”.

MORE FOCUSED ON DEALING WITH MAIL

Young Families create specific places, such as a notice board or fridge, where they keep letters with vouchers or items that are interesting or useful.

They begin to read their mail more thoroughly, and file more of their mail, but also to share it. They are more likely than the sample to talk with other members of the household about marketing mail, transactional mail and unaddressed mail.

² Office Of National Statistics (ONS), 2014.

This engagement ultimately drives action. As a result of receiving an item of addressed mail, Young Families are more likely than the sample as a whole to:

- Have bought or ordered something (29.6%/index 111).
- Enquired for more information by phone (16.2%/index 124) or online (16%/index 124).
- Used a voucher (52.7%/index 107).
- Tried a new product (13.3%/index 113).
- Provided household information to a company (12.3%/index 114).
- Visited a store (23.1%/index 108).
- Paid more attention to an advertisement (11.1%/index 120).

THE SMARTPHONE IS INDISPENSABLE

This enthusiasm spreads to digital channels as well. Just under half (45%) say they could not live without the internet on their mobile phone (index 152). This is reflected by the fact that they use smartphones to respond to mail more than any other group.

From our sample, 14.4% of Young Families have responded to direct mail using the internet on a mobile or tablet (index 192) and 20.8% have used a PC or laptop (index 126).

By contrast, only 6.4% responded by post and 7% responded by phone.

Research from Babycentre, published in Marketing in April 2013, confirms the role of the smartphone and tablet in the lives of Young Families. “The smartphone quickly becomes the mother’s significant other: 36% of women purchase a smartphone as a result of becoming a mum, while 59% of mothers called it their “do-everything device”.

Mail not only stimulates them to respond online, but it can also play a helpful part in their online experience. And 15% referred to information from mail whilst online, an index of 123.

Magazines also have a new role to play. Young Families are more likely than most to be looking for ideas to improve their home (41.1%/index 136), and are more likely to say they change the decoration of their home as often as possible: more than a third (35.2%/index 123) agree that “magazines give me ideas on how to improve my home”.

MONEY AND TIME PRESSURE

But all this activity comes at a cost. Young Families become more price conscious as costs rise and in some cases income – perhaps only temporarily – falls.

They are more likely to use credit cards daily than any other group, and to be concerned about consolidating loans. They are quite likely to use price comparison sites: 44.8% (index 124) agree “I find I am using price comparison sites more often these days” and 38.5% (index 110) agree with the statement “I check through my post for things that might save me money”.

Time poverty is very real for this group: 69.7% (index 122) of this group agree “There are not enough hours in the day to do the things I want to do”, and 53.6% (index 144) agree “I find it hard to find time to relax”.

HOW MAIL HELPS YOUNG FAMILIES

As the Young Families’ mail diaries show, mail can provide both information to help them create order, and a focus for when they want to relax.



Greg and his wife have two young children. Like others, Greg thought he had very little interaction with mail before keeping his diary but this proved to be inaccurate.

Among the items he looked at and responded to were:

- An appointment for a flu jab for one of his children, which he phoned to accept.
- A door drop for a local guttering company which he enquired about online and then phoned to book.
- A voucher for H&M which he shared with his wife and filed for online purchase.
- And a newsletter from Opera North (Howard Assembly Room) with which he has a relationship.

Many other items were discussed with his wife – a door drop from a local chiropractic practice, an acquisition mailing from a credit card company, and a flyer from a local property services company among them. Some things did get binned immediately; take away menus, for example, which were not to their taste.

FAMILY MAIL ROUTINE

Greg's family had developed a clear routine for handling mail as well. Mail packs were initially kept in the kitchen until sorting. Some were then stored in filing boxes, others put away in a post rack on the worktop or displayed on their fridge – the place for items that needed to be discussed with his wife and dealt with.

Magazines wound up in the bathroom and Greg took some mail to work, where he used his breaks to respond online.

Another Young Family respondent articulated the same behaviour, and made it clear why they did it:



I had a letter this week reminding me I need to pay the annual freehold fee. I put it in my work bag to remind me to pay this at work. That way I won't get preoccupied doing family things and forget.

Leanne, Manchester



The newsletter from Opera North was read and displayed in Greg's living room. Not only did he personally enjoy it, but it also had a function:



Mail that I particularly remember being of use to me was a listing for an arts house in Leeds (Howard Assembly Room) – a spin off from Opera North. It impressed guests.

Greg, Leeds



So although the family had become the centre of his attention, mail also had a role in affirming and signalling his other interests.

Note that the casual display of mail to make a social statement can't be done digitally: sharing online is by definition "on purpose" rather than accidental. This role for newsletters, catalogues and magazines is present in most life stages, but seems to increase as the home's function as the place for entertaining friends – rather than going to a restaurant or club – increases with family life.

Claire lives with her partner. She is getting used to being a first-time mother, and while still on maternity leave is getting more organised than before.

This applies to mail too: she picks up the family mail very quickly – to prevent the family dog from chewing it – and quickly sorts it in the kitchen, making, as she says, fairly snap decisions.

Transactional mail gets filed upstairs, irrelevant material gets put in the recycling bin, and those items that need action are handled using the internet via her smartphone, which she can use one-handed while looking after her baby.

CATALOGUES FOR RELAXATION

A number of items get much more thorough attention: catalogues from The White Company and Laura Ashley are kept in a rack in the living room so Claire can look through them in the rare moments she has to relax.



I get some nice ideas for things from it, [Laura Ashley brochure] things I might want to buy, or curtains I might get made... It gives me some inspiration.

Claire, London



Other Young Family respondents echoed this description of spending some time with a catalogue, brochure or magazine as a treat or reward. Vouchers are useful, but it was a catalogue that inspired this comment from a mum of three:



It's [Lakeland catalogue] an association. It means a cup of tea and 10 minutes for me. Flicking through something that's pretty to look at.

Sarah, London



Life for father-of-two Neil is busy, so mail from companies he had previously used was by far the best way to reach him. He only watches pre-recorded television and takes steps to avoid advertising of all forms, but warm mail is different:



If we've already a pre-established interest in a brand I don't mind being on their mailing list. By sending news of offers by post they are fulfilling the job I've asked them to do in keeping me updated. Email just wouldn't come close to doing the same job because it's so easily ignored.



RELEVANT AND USEFUL MATTERS

Busy Young Families were clear that they want more relevant and useful mail. To the question "what mail would you like to receive?" one father said:



Nights out... You don't seem to get that, 2 for 1 off them would be nice... Club entry, theme parks... It would be nice to get it through the door. And something interesting to read.

Lee, Manchester



Leanne, with one child, used the items she received in one pack for a wide variety of activities.



“

These were sent to me by Boots in an envelope referring to my daughter's upcoming 1st birthday so I decided to open it. It contained a voucher for a free photo book which I have been on to the Boots website and used to order the book. I have kept the items below because I think they will be very useful as they contain information regarding child nutrition and food ideas for my one year old. I will place them on the inside of one of my cupboards in the kitchen for easy reference.

”

“What I found particularly surprising from your research is that young people aged 15-24 years respond so highly to direct mail. Your suggestion to offer them various means of response channels, but always a digital one, makes perfect sense.

I also think you make a good point around the need to use the insights you've gathered on your customers to tailor your communications – send them relevant and timely communications, and make sure what you send is a worthy investment of their time. We tried to do exactly that with our “Because” campaign aimed at new parents. The sentiment was that life's now more than just about you. We ensured our copy and creative communicated that insurance is a family issue and tapped in to this big period of change in their lives.”

Richard Thomas – Existing Customer Campaign Manager



TIPS FOR YOUNGER FAMILIES

Appeal to them in their family roles

As parents, Young Family couples want to do the best for their children. They are especially focused on areas like health, nutrition, early years development, as well as finding value for money.

Reflect their positive energy and optimism

Young Families are enthused by their new status and optimistic about their lives. Mail that aligns with their mind frame is more likely to be considered than that which disrupts it or does not take it into account.

Time is precious

Young Families are often time poor. Mail that simply and clearly expresses benefits and response mechanisms is likely to be well regarded, as is that which rewards them or allows them precious time to relax.

Young Families value mail

Relevant mail that helps Young Families is valued, and the sentiment is transferred to the company or organisation that sends it. They are practical and focused on their parental roles, so content is likely to be more important than design.

Make digital the key response channel

Young Families are time poor and digitally focused. Clear digital response mechanisms make it easy for them and allow multi-tasking. The exception is vouchers which they appreciate, because they are often tight for money and allow immediate redemption.

OLDER FAMILIES

c. 3.7 million in GB

ABOUT ME

63%

AGE 35-54

MAIL AND ME

27%

BOUGHT OR ORDERED
SOMETHING AS A RESULT OF
RECEIVING ADDRESSED DIRECT
MAIL IN THE LAST 12 MONTHS

52%

USED A VOUCHER THEY
RECEIVED IN THE MAIL IN
THE LAST 12 MONTHS

39%

HAVE KEPT MAIL THEY
RECEIVED IN THE LAST
12 MONTHS

ATTITUDES

+30%*

MORE LIKELY TO SAY THAT
ADVERTISING HELPS THEM
CHOOSE WHAT THEY BUY

25%

SAY THEY ARE FINDING IT
DIFFICULT TO LIVE/COPE ON
THEIR PRESENT INCOME

39%

SAY THEY BUDGET FOR
EVERY PENNY WHEN DOING
THE HOUSEHOLD SHOPPING



* = index percentage

Source: TGI, TouchPoints 2015

“I found this research both enlightening and somewhat reassuring too. We know mail works, and have seen your previous research on this, but this report helps us to understand why it works, and also gives some useful practical advice that I will be sharing with my creative and media agencies. I want to think about how to apply these insights into our existing segmentation, with a view to formulating some test plans.

One thing really stood out for me. I hadn’t realised how widely mail is shared within households of Older Families. This insight has brought to my attention the need to consider this when developing propositions and creative to this group, in order to maximise share-ability.

I also found it reassuring to see that this life stage like to use digital channels to respond to mail. We have seen that direct mail drives people to respond online, so we are always mindful to ensure that we offer as many online response channels as possible.”

Duncan Clayson – Senior Marketing Manager



Older Families are those with at least one child in secondary school. They tend to be between the ages of 35 and 54. Their income is similar to that of younger families, but they are the group most likely to be finding it difficult or very difficult on their current income. They are also the group most likely to have a pet.

This life stage seems to be the most communal of all the different groups. Older children are more able to share in the life of the household rather than simply be its focus. Choices about activities, products and services are more likely to be discussed with partners and children rather than the partner alone. The manner in which this group engages with their mail reflects this.

This group is more likely than most to share the management of mail, from opening it to checking, paying bills, and filing it. They also discuss it; 24.3% said of addressed mail that they “talked to other people in my household about what I had read” (index 119).

The volume and breadth of mail they receive seems to continue to grow, as does the time they spend on it per day (14 minutes). Almost a fifth (19.8%) receive mail from high street stores (index 120), and they over-index on mail from credit card companies, supermarkets and even takeaway restaurants.

They also over-index in terms of their positive associations with mail, including finding it welcoming, useful, memorable and informative. Thus they are generally warm to mail:

- 59.4% say they like mail from companies that reward customer loyalty (index 111).
- 23.4% agree that mail often alerts them to new products and services (index 112).
- 9.3% agreed that after receiving an item of addressed mail they felt “more reassured about the service or product the sender provides” (index 122).

DIGITALLY DRIVEN RESPONDERS

In most areas Older Families are above average in their actions and response to mail. They buy or order as a result of it, go to stores because of it, file it, refer to it, follow up any queries using phone or internet, and use the vouchers it provides.

They see mail as part of an omni-channel world: 11.3% (index 122) said that as a result of receiving addressed mail, they paid more attention to an advert.

Like Younger Families, they are also more likely than most to use digital channels to respond. Of those who responded, 30.4% did so online via a PC or laptop (index 129) and 9.7% (again index 129) went online using a mobile or tablet.

It's clear that mail is fully integrated into and a key part of their lives. As older children seek to be treated as equals, mail helps by making it easier for the family to take into consideration everyone's views.

Older Families understand how to manage it, use it, appreciate and share it. This is mail's heartland.



Paul, works in IT and has two school-aged children. He receives between four to six items of mail a day.

During the week he kept his diary, he was surprised how much he engaged with mail and used it.

As a result of the mail he received, Paul took actions including:

- Booking a family holiday.
- Planning his Christmas shopping with the help of a Littlewoods catalogue.
- Phoning a takeaway restaurant.

And acting on other items (including items from Chessington, Alton Towers, BT and HSBC).

He conducted all these actions online.



I work in IT so am used to looking everything up online. To be honest I am glad to have something in my hand. I often take stuff to work to look at on the train.



ADVERT AVOIDER ENGAGES WITH MAIL



Anita describes herself as an ad avoider, including marketing mail. She watched virtually no TV, and had ad avoidance software on her internet technology.

Nonetheless, she happily showed items that came via mail on a pin board in her hallway, on the sofa in her living room, on a bookcase in her kitchen, and items in her study that were waiting to be filed. She actively engaged with much of the mail she received.

During the week she kept her diary of mail she received and engaged with:

- A door drop about a local community group which inspired her to look them up on the internet.
- A flyer from a pharmacy offering free flu jabs, which resulted in her going online to check its efficacy.
- A catalogue from Screwfix, which she read and kept on top of her toolbox (in the kitchen) and with the intention of ordering a chainsaw before Christmas.
- Vouchers from Dominos, which she put on the pin board to be used for her children if she was out for the evening or too tired to cook.
- She searched a local magazine that had arrived by door drop for a roofer.
- A renewal letter from Saga home insurance was discussed with her son and reminded her she needed to shop around. As a result, she accepted a cold call from a different supplier and spent 40 minutes discussing and ultimately buying a new policy.

Mother-of-two Natasha also uses the fridge door as a handy place to keep vouchers:



“

If post is useful to me such as vouchers these do get stuck to the fridge, so that they are a visual reminder that I have them and they are easy to grab, I don't have to go looking for them when I want to use them. I put Tesco Clubcard vouchers in a magnetic display sleeve on my fridge in date order to remind me to spend them before their expiry date.

”

She also gets excited by the right type of catalogue:

“

Factory store leaflet. This is my guilty pleasure. I love getting this through the door at home, seeing the bargains that are available that month. It almost always prompts a visit to my local store. I love this leaflet, you have to sift through the tat to find the bargains, makes me feel like I have earned a bargain, bit like going to a jumble sale and finding a gem amongst the haystack.

”

COMMUNAL EXPERIENCE

Others in this life stage illustrated again how mail was often passed around or used communally. Transactional mail is a helpful reminder to take action, but the recipient may not be the person who takes action. One man told us that when he received bills or account statements in the mail, it went straight to his wife:

“

My wife deals with all of the finance – well, she's a book-keeper. But she leaves very early and I often work at home. So I tend to work out what needs action and it all goes here on her laptop. She'll deal with everything usually at least once a week – all of that's done online where we can.

Anthony, Brighton

”

For one of our Older Families, mail items help the family enjoy mutual hobbies and activities.



In Steve's family, a Go Outdoors brochure lives permanently on the kitchen table to be viewed by the whole family.

“

Go Outdoors is a really good shop. Kids are into camping and Scouts. We've bought clothes from there on a number of occasions; we've got a card for it... We'll go in twice a year and buy something. [Re the catalogue] I tend to have a flick through [but] it's more about the lads. It's handy to have something like this, you can have a flick through to see what's there and then we'll go online before going in [store]. I always go there first.

”

And effective warm communications can drive sales, even when the buyer is not the recipient. One Older Family respondent reported:

“

I used to have an Audi. I get a lot of glossy items from the dealership. I guess they are trying to keep up a relationship with me. I don't mind that... My daughter was looking for a new car, but the Audis were too big. [Then] I got an invite to the launch of the Audi A1 through the post, so I thought we might go down. We had some fizz and canapes, it was nice enough... We bought one in the end. I wouldn't say it was the reason we bought it, but it just happened to arrive at the right time.

John, Brighton

”

We also found that the quality of a brochure can add to the sales experience – even if they buy online.

“

I like the occasional new season brochure from Boden/Hush as I like their clothes... [A] brochure is good to bookmark pages but if I buy it's almost always online. I like the content... nice quality clothing always photographed well.

Heather, London

”

TIPS FOR OLDER FAMILIES

Recognise the role of the family

Amongst Older Families, children often share in the life of the household and participate in discussions about product choices and activities. Mail is more “communal” and often shared or displayed to be actioned or discussed by more than one family member. Content and design should recognise this.

Older Families may be financially hard-pressed

Value messages and offers are likely to resonate with this group.

Mail is used to evaluate – and evangelise – brands

Mail designed for parents is also seen and noticed by their children. The immediate benefits may accrue to parents, but it is an opportunity for brands to register with a younger audience by sending mail that is inclusive and acknowledges the role of children in older families.

Mail informs and drives digital response and action

Older Families over-index on digital response channels, so mail that highlights easy-to-use digital response mechanisms is likely to be considered. Parents in Older Families may also deal with mail out of the home, further underlining the importance of digital response.

EMPTY NESTERS

c. 10 million in GB



MAIL AND ME

26%

BOUGHT OR ORDERED
SOMETHING AS A RESULT
OF RECEIVING DIRECT MAIL
IN THE LAST 12 MONTHS

32%

RENEWED A SUBSCRIPTION
TO A PRODUCT OR SERVICE
AS A RESULT OF RECEIVING
MAIL

18 MINS

ARE SPENT READING
MAIL EVERY DAY

ABOUT ME

67%

AGE 55-74

ATTITUDES

74%

AGREE YOU MUST TAKE
RESPONSIBILITY FOR YOUR
OWN FINANCIAL SECURITY
AFTER RETIREMENT

29%

REPORT RELYING ON
NEWSPAPERS TO KEEP
THEM INFORMED

63%

BELIEVE IT IS IMPORTANT
TO BE WELL INSURED FOR
EVERYTHING

68%

BELIEVE THEY ARE VERY
GOOD AT MANAGING
MONEY



“We have always used direct mail and have a customer base that appreciate this medium and are familiar with it. Our customers love to learn about what’s new and exciting and be inspired to do something new too. Direct Mail works for this – since you can’t read an 80 page email!

Great to have much of our thinking reflected in this research and validated by other 3rd party sources.”

Mat Finch – Marketing Director

Warner
Leisure
Hotels

The peak age for Empty Nesters – couples whose child(ren) have left home, and where at least one partner is still economically active – is between 55 and 64 (36.9%).

This group's age spread will continue to increase, driven by several factors. First, as the age of a mother at the birth of her first child increases, so too will the age that children leave home; second, as the age of retirement increases and more people continue to work at least part time past the age of retirement; and third, some may have children that "boomerang" back into the family home.

SOME EMPTY NESTERS "LIVE THE DREAM"

Despite that, Empty Nesters have specific characteristics. They have, on the one hand, experienced the challenges and rewards of raising children. But unlike the older retired group, many are not yet limited to pension income alone, so disposable income stretches further: 38.8% (index 155) say they are comfortable on their present income.

Empty Nesters are more likely than previous groups to watch broadcast TV, read newspapers, and spend significantly on DIY. Preferred brands include M&S and John Lewis. For some, this is the opportunity to "live the dream". Without the costs and responsibilities of dependent children and relatively unencumbered with age related health limitations, they have the money, time and energy to reward themselves. According to TouchPoints, they are more likely than the norm to agree with the statements "I am optimistic about life" (71.2%/index 107); "I like to get out of the country when I can" (74.6%/index 114) and "I can afford to splash out on luxury goods sometimes" (58.7%/index 111).

Compared to the Older Families group, they are less stressed: 29.7%/index 69 of Empty Nesters agreed with the statement "I am feeling more stressed these days", versus 48.4%/index 112.

Accordingly, people in this group are more likely to have read mail from the holiday and travel sector in the previous four weeks.

SOME FOCUS ON CONSOLIDATION

For other Empty Nesters, however, this is a more conservative period or a time of consolidation. They know that retirement is coming, and worry that it will be longer and perhaps more expensive than they had thought.

The emphasis becomes on protecting what they have. Only 34%/index 89 agreed with the statement "I am willing to spend money to save time", compared to 40.4%/index 105 for Older Families respondents; and 81.3%/index 107 agree with the statement "I don't spend what I don't have", higher than that for Older

Families (71.3%/index 94). This is the group that is least likely to report that they enjoy shopping for clothes but most likely to “get a good deal of pleasure from their garden”.

They are more likely to believe they are “very good at managing money” (67.9%/index 124) and are putting that ability to work. They are the group most likely to feel it is important to “be insured for everything” (63%/index 125) and to believe that “financial security after retirement is your own responsibility” (73.7%/index 126) above norm.

PREFERENCE FOR THE FAMILIAR

What is interesting about this group is that their use of digital technology as a way to respond to mail may be starting to decline.

For example, 30% of Older Families responded to an item of direct mail online (index 129) via a desktop or laptop and 10% went online using a mobile or tablet (index 129). The respective figures for the Empty Nesters are 21% (index 90) and 3% (index 46). Empty Nesters are much more likely to respond by phone (14.5%/index 156) or post (10.5%/index 136).

It seems that without the influence of the younger generation, people in this life stage continue to use familiar methods of communication.

This includes print. Empty Nesters are the group most likely to read a newspaper every day and rely on newspapers to keep them informed. As printed material, mail benefits from this too: 64.2% (index 117) agree they “would feel less in control of their lives if they didn’t have printed copies of important documents”.

MAIL HAS ITS PLACE, BUT...

Mail is still a key part of Empty Nesters’ communications channels, but it is beginning to lose some of the positive associations held by those in the family life stages. It is not that they are negative; simply that their perceptions are much closer to the average of the groups as a whole, rather than dramatically higher.

This may be due to the nature of the mail they receive. Almost one in five claim to receive between three and five items of addressed mail per day. Compared to family groups, it comes from a wider range of sectors, including building societies (31.2% versus 21.6% for Older Families), insurance companies (30.5% versus 20.9%) and charities (34.2% versus 25%).

So their mail is no longer new or filled with answers to problems they have not faced before. They've experienced many years of mail, and handling it has become a habit.

For 72% of Empty Nesters opening the post is part of their daily routine: this is only 8% above the average of the sample – part of a trend that sees marginally higher interaction rates with mail. For example, Empty Nesters are also above norm in having specific places in the home to keep catalogues, letters and vouchers, and to display useful items.

EFFICIENT AT DEALING WITH MAIL

Empty Nesters are more efficient and focused at dealing with mail. They are more likely to open all their mail immediately, read it once and then decide to what to do with it.

If they keep the item they are more likely to leave it out and read it more than once, or to set aside spare time to read it carefully. They are much more likely overall to re-read items they keep, often four or more times for items such as newsletters, catalogues, statements, loyalty mailings and information on local events and businesses.

Together this suggests Empty Nesters become more selective than other groups. Mail that is relevant, useful or interesting is kept, used, and considered; mail that is not is discarded quickly. Their life experience has taught them how to separate the wheat from the chaff.

Their likelihood of trying a new product or service is relatively low; only 9.8% (index 83) agreed with this.

EMPTY NESTERS OVER-INDEX ON RENEWALS, UNDER-INDEX ON THE NEW

Why? A child-free life could create new needs or desires. But this may reflect the fact that while some Empty Nesters are planning new experiences, others are downsizing mentally, if not in actual property.

But they are still consuming, and over-index in renewing an existing product or service as a result of mail: 32.2% (index 126) of Empty Nesters said they did this.

As with the respondents from other life stages, the Empty Nesters in our qualitative research tended to assume they interacted with mail far less than they actually did.



Ronald and Carole were a case in point. The interviewer talked to them in the family home shortly before they were to move. “We don’t keep any mail”, they said at first.

But when asked, they said that the letter from Sky in view on the living room table was to remind them to get connected in their new property. There were also five different cruise catalogues they were looking through to consider new routes and show to visitors. For them, leaving the catalogues in the living room was a way of displaying their identity.

Carole carried with her vouchers from Clubcard and M&S which she nearly always used when shopping.

Ronald read his copies of Qwerkity catalogue in the living room, looking for presents for his children and grandchildren, but then took it upstairs to keep by the computer when appropriate. Ronald says:

“

To look through [the brochure on] e-mail... you just couldn't do it, you're not going to look through 80 pages but this is divided into girls, boys, teenagers. The right 20 pages, you can delve into at any time. I'd much rather look at a brochure than online but I think that's probably because we're older.

”

Ronald also has an eye out for value:

“

Anything that comes has got to have an interest to it... or it has to have value, and it tells you what's coming up promotion wise for the following week.

”

ORGANISED USERS – AND CONDUITS – OF MAIL

It appears common for Empty Nesters to keep relevant items of mail to help or benefit others.

Theresa kept a door drop from a local builder – not for herself, but to pass on to a friend in her dog walking group.

John, who lives with his wife, proved the most committed in this regard. During the week he was keeping his diary, a mailing came in from British Gas offering a discount on a new boiler. He tore it up and put it in the recycling bin, only to remember later that his father-in-law had mentioned he was considering buying a new one. John retrieved it from the bin, taped it together and passed it on.

Empty Nesters' mail habits may change once they are child free, but organised systems are still very much in place.

General sorting takes place on the kitchen table; things that need to be responded to are left out, either by the computer or on a desk; vouchers go in the wallet or purse of the person most likely to use them; and the finance material is filed. One woman had paper copies of her accounts going back 10 years, as she liked to keep them "just in case".

But catalogues and brochures of brands they regularly used were more likely to be on display than in other groups – possibly because, now child free, they had more space.

Irene, is planning a trip to Scotland and while she was researching online, she ordered brochures to look at the options in more detail. She brought them with her when she visited her family to show them what she is planning.

And again, while they may be more likely to respond by phone or mail than other groups, some also go online to respond. Jackie said:



“ A brochure from Cotton Traders a few years ago tempted me to send off by post for clothing and shoes... I have since transferred to online ordering from Cotton Traders which I do fairly regularly. Jackie, Manchester ”

TIPS FOR EMPTY NESTERS

Empty Nesters are comfortable with, and respect mail

If it's relevant, Empty Nesters like longer form copy, and make the time to read it – often more than once.

Empty Nesters take pride in their experience of life

Empty Nesters have considerable experience of mail and dealing with life situations. They should be addressed in a manner that is personal and respectful, and doesn't condescend.

Show you understand their feelings about the future

Empty Nesters are both excited about “living the dream”, and apprehensive they may face future health and money concerns. Consider your message in terms of the inspiration and reassurance it offers.

Empty Nesters of the Baby Boom generation are the original teenagers

Mail that treats Empty Nesters as individuals and empowers their ability to make choices is likely to be well received. The idea of choice extends to response channels, so it is helpful to provide digital mechanisms as well as analogue ones, including the phone.

They are ageing, not old

Their children may not live at home, but Empty Nesters may feel a sense of responsibility for other adults, including relatives from the previous generation. They often act as conduits for others, passing on tips or content from relevant mail.

OLDER RETIREES

c. 6 million in GB

ABOUT ME

66%

AGE 65+

MAIL AND ME

18%

USED THE PHONE TO ASK FOR MORE INFORMATION AFTER RECEIVING AN ITEM OF MAIL

32%

SAY THEY RESPONDED TO MAIL IN THE LAST YEAR

43%

KEEP MAIL FOR REFERENCE

ATTITUDES

72%

SAY THEY LIKE RECEIVING MAIL IF IT IS RELEVANT TO THEM

34%

AGREE IT'S MORE IMPORTANT TO DO YOUR DUTY THAN LIVE FOR YOUR OWN ENJOYMENT

54%

AGREE THAT UNADDRESSED MAIL IS A GOOD WAY FOR A LOCAL AUTHORITY TO TELL THEM WHAT'S GOING ON IN THEIR AREA

“An excellent report which gave insight into consumer behaviour and mind set beyond their interaction with mail. Well written, easy to digest, I found the report really helpful – I really liked the tips sections which were direct and actionable. The examples were great – bringing to life segments in such an explicit way.

The report highlights some behaviours/consumer attitudes we know, but have maybe forgotten about, and then some new insights too. Overall a well-considered and insightful report.”

Ann Steer – Marketing Director



Older Retirees are singles or couples whose only income is from pensions and/or investments. They may live in households managed by one person.

They have the highest claimed viewing of TV and the lowest claimed usage of online of any group. Unlike Empty Nesters they are more likely to say they are “coping” rather than comfortable, with 76% agreeing that “I am coping on my current income”.

Attitudinally, they are value driven in areas like religion, conservation and patriotism. For example, 34.2%/index 136 agree “It is more important to do your duty than to live for your own enjoyment”. More than half (53.9%/index 144) agree with the statement “I buy goods produced in my own country whenever I can”.

Higher life expectancy means that, as a proportion of the population, this group is growing. Numbers will increase further as more Baby Boomers reach this life stage.

Some behaviours may change as a result, but many may still live on limited budgets, and will not anticipate material increases in their income.

ORGANISED MAIL ROUTINES

TouchPoints shows that Older Retirees are more likely than any other group to: take personal responsibility for opening the mail; paying the bills; checking statements; and filing any relevant items. They were more likely to indicate that they don’t pass mail to someone else.

This may simply be a factor of the highly organised way they deal with mail. Four out of five agree that post is part of their daily routine, and they are more likely to say that they open mail immediately. They over-index in having specific places in the house for catalogues, vouchers and other offers.

There may be a substantial proportion of this group who are widowed or who have a partner who – whether at home or in care – no longer takes part in managing their lives.

This group appreciates addressed mail. They have the highest propensity to buy or order something in response to mail (31.8%/index 119) and, according to TGI, are most likely to respond by post. They are more likely to keep mail – particularly newsletters, catalogues, brochures, and advertisements from local traders – for later use, often for a long time.

Amongst Older Retirees, mail drives renewals: 34.9% (index 136) renewed an existing service as a result of receiving a mail item.

FAMILIARITY LEADS TO APPRECIATION

For this group, print is a familiar and comfortable medium. Almost 75% (index 136) agree that they would feel less in control of their life if they didn't have printed copies of important documents.

In many areas they are marginally above the sample as a whole in their perceptions of mail. They like receiving mail if it is relevant (71.5%/index 111) and believe it is acceptable for companies they have used before to send them information on other goods and services (37.3%/index 110).

They are comfortable with unaddressed mail as well: 37.4% (index 111) say that it is a good way for local traders to let them know about their services, and 53.5% (index 115) see it as a good way for a local authority to communicate. In sharp contrast to Fledglings, they also find it easy to respond to (13.2%/index 131).

Older Retirees spend an average of 21 minutes a day reading and managing their mail, longer than any other group. This could be simply because they have more time available to them and they linger longer over mail.

RELEVANCE IS REWARDED

Older Retirees' attitude to mail is not indiscriminate. Having long experience of the channel, they know that while there is much that is worth using, sharing, saving and re-reading, some mail isn't.

They are slightly more likely than the sample to discard an item immediately after reading it. And while Older Retirees are more positive about direct mail than any other medium, they can also find it intrusive. They are less likely to engage if the content is irrelevant.

All the Older Retirees in the qualitative research lived on their own, although they previously had partners. Many, however, had family nearby.

Brochures, catalogues and information that connected with and fostered what they do already – rather than disrupt set ways – were mentioned by many of our respondents as useful. Some used these to find gifts for family relatives close and far.



I will go through all the brochures eventually and decide if there's anything there and if there isn't they get thrown away. There's an item in one of the older ones I really like, a possible wedding present. I'm keeping it because they haven't got married and I like the item – I haven't seen them anywhere else. It's a reminder.

Val, London



KEEPING MAIL FOR SHARING

Dorothy from Lancing enjoys getting brochures to flick through before going online or calling in her orders. While much of her mail is in the kitchen – and letters can get stacked for up to two weeks – her brochures are in her study next to her computer to use on line. Even so, she will often finally order by phone.

She typically has material from Coopers, JD Williams, Fred Olsen and Lifespan, and tends to discard these only when a new one arrives. She also keeps travel brochures. When asked why she liked the cruise brochure, she said:



To see where they're going... And then I did go on their web site to look into it from that. But actually having it in the catalogue, it's easy to show anyone I want to show it to – where I'm thinking of going.



Human instincts to share and show cross age boundaries. Dorothy may not use social networking but, just like the Fledglings, she wants to show, discuss and enjoy interacting with friends. But for her, paper is a more useful and intimate means to do so than a digital screen.

TIPS FOR OLDER RETIREES

Build on their comfort and respect for printed materials

Older Retirees appreciate longer copy – and have the time to read it – and the more traditional rules of grammar.

Values – as well as good value – are important to them

Older Retirees tends to live off a fixed income, so mail that offers value and/or discounts will resonate. Mail should also highlight values that appeal to them and align with their world view.

Remember that many are alone – and not all by choice

Many Older Retirees may live alone, either through bereavement or the ill-health of their partner. It is important to be sensitive to this possibility.

Relevant mail can be saved, savoured and shared with both friends and younger relatives

As with Empty Nesters, Older Retirees are often a conduit for mail messages to reach others, including those from younger generations. Their mail experience may influence others. Like all life stages, those in this group share and display mail.

Post is a favoured response mechanism

Older Retirees are more likely to respond by post, but not exclusively so they use all available channels. Offer them a choice, including voice and digital.

CONCLUSIONS

The aim of this project was to explore how mail was seen and used by consumers at different points in their lives, and how they engaged with mail.

Consumers of all ages and all levels of digital use engage with mail; they open, share, display, file and respond to mail, both addressed and unaddressed. There are variances, but these are relatively minor and appear to be at least partially due to the volume and type of mail they receive.

Age is a conventional framework marketers use to differentiate different groups of people. But it can sometimes be a blunt tool. An individual aged 18–24 who lives at home is not the same as one who lives in shared accommodation or one who is part of a couple.

For this project therefore, we found that life stage was a more sensitive way to look at mail consumers. It allowed us to include factors like accommodation, co-habitation and family responsibilities, all of which have a significant bearing on how people receive, use and respond to mail.

The differences between different life stages reflect different levels of experience and confidence. Those who have received the least amount of mail need more clarity about how to use and respond to it, while those with more experience do not.

As people move between life stages, the role and benefits of mail change. Those who are facing new challenges in life, like parents bringing up children, use mail to help them understand and respond to activities they lack experience of; while those who have passed through these stages tend to use it more to help consolidate their lives, or to provide more leisurely inspiration. For all of these life stage groups, however, mail is a reassuring medium that can help organise, reassure, and direct them.

By considering the details of each life stage, advertisers can fine tune their mail strategies and creative executions to make it an even more effective medium.

“This is a great piece of work challenging the ‘perceived’ wisdom that direct mail is dead (especially for younger groups).

Direct mail has always proved successful when combined with multiple means of response however this report goes further and talks about the added value mail can bring in demonstrating the ability to create mental availability and so enhance the brand experience.

The tangible nature of mail is also a good call out as it talks to the ability to prolong brand impact beyond the initial exposure and finally it’s great to have solid metrics that support the use of mail as part of a mobile or shareable recommendation.”

Caitriona Henry – Global Strategy Director



APPENDIX

ABOUT THE QUALITATIVE RESEARCH

The report draws from two complementary strands of qualitative research conducted on behalf of Royal Mail MarketReach by independent research agencies.

Quadrangle conducted three-hour in-home interviews with 30 consumers from a range of life stages, in order to understand their attitudes and behaviours towards mail. 20 of these participants also completed online diaries and interviews which enabled deeper reflection and discussion around mail attitudes and behaviour.

Trinity McQueen conducted week-long immersions with 12 consumers, which comprised daily depth interviews, data capture from life-logging cameras, diaries and passive tracking of participants' mobile digital devices, in order to understand participant's stated as well as actual behaviours around mail.

How life stages were defined on TGI and TouchPoints

Which of the following have you done in response to addressed mail/post you received in the past 12 months?

| Life stage | Definition |
|-----------------------|---|
| Fledglings | TGI Fledglings |
| Sharers | TouchPoints PI3 "I am sharing a home with flatmates" OR "I am sharing a home with tenants/lodgers" |
| Couples | TGI Flown the nest + Nest Builders + Mid-life Independents + Unconstrained couples AND ticking YES to TouchPoints PI4 "Married/Civil partnership/ Living with partner" TGI "Married/Living as a couple" in marital status question |
| Young Families | TGI Playschool Parents + Primary school Parent |
| Older Families | TGI Secondary School Parents |
| Empty nesters | TGI Empty Nesters |
| Older Retirees | TGI Retirees/TouchPoints Retirees (PI11) EXCLUDING "Empty Nesters" |

TGI data used: TGI 2015 Q4 (July 2014 – June 2015) or (March 2014 - April 2015)

IPA TouchPoints 6 data used: February – June 2015. Time used within TouchPoints diary study, 7 day average of "looking at mail".

CHART AND TABLE SOURCES

Page 13: Different age groups see mail the same way

Source: Royal Mail MarketReach, Mail and Digital Part 2, Quadrangle 2014

Base: UK adults 790 age 18–34, 1,059 age 35–54, 519 age 55+.

Question: “Please choose the words you most associate with the different ways that [industry sector] tend to communicate with you”

Page 14: Uniformity of response to mail by age

Source: Royal Mail MarketReach, Mail and Digital Part 2, Quadrangle 2014

Base: UK adults 790 age 18–34, 1,059 age 35–54, 519 age 55. (Multiple answers allowed.)

Questions:

“Please indicate which you feel apply to the different communication types when they are used by brands, businesses and /or organisations?”

“Does the following apply to you?”

“Thinking about mail that is addressed to you, how much do you open?”

“Which communication method do you feel applies to the following?” (Multiple answers allowed.)

Page 15: Age is not a factor in response levels

Source: Royal Mail MarketReach, Mail and Digital Part 1, Quadrangle 2013

Base: UK adults 256 age 18–34, 390 age 35–54, 354 age 55+.

Question: “In the last 6 months, have you taken any of the following actions in response to the post you have received?” (Multiple answers allowed.)

Page 16: “I prefer to read on paper than on screen” (% agree)

Source: Royal Mail MarketReach, Ethnographic Quant, Trinity McQueen, 2014

Base: UK adults 326 age 18–34, 277 age 35–44, 214 age 45–54, 306 age 55–64, 106 age 65+.

Question: “To what extent do you agree or disagree with the following statement. ‘I prefer to read on paper than on screen?’”.

Page 17: Younger respondents react emotionally to mail

Source, Royal Mail MarketReach Valued Mail, Quadrangle, 2014

Question: “And how did this mail from [brand] make you feel when you received it?

And what did you feel as a result of receiving this item of mail from... (%)”

Base: UK adults 768 age 16–34, 277 age 35–44, 1,241 age 35–54, 984 age 55+. (Multiple answers allowed.)

Page 18: Why different age groups open mail

Source: TGI 2015 Q4 (July 2014 – June 2015)

Base: GB adults 2539 age 15–24, 3877 age 25–34, 3558 age 35–44, 4373 age 45–54, 4551 age 55–64, 4220 age 65–74, 1883 age 75+

Question: “What elements of a piece of addressed mail would make you more likely to open/look at it?”

Page 19: Bought or ordered in response to addressed mail

Source: TGI 2015 Q4 (July 2014 – June 2015)

Base: GB adults 2539 age 15–24, 3877 age 25–34, 3558 age 35–44, 4373 age 45–54, 4551 age 55–64, 6103 age 65+

Source: Ebiquity 2015, 3366 UK households.

Page 20: Does age determine method of response to mail?

Source: TGI 2015 Q4 (July 2014 – June 2015)

Base: GB adults 2539 age 15–24, 3877 age 25–34, 3558 age 35–44, 4373 age 45–54, 4551 age 55–64, 4220 age 65–74, 1883 age 75+

Page 23: Mail response by life stage. More in common than not

Source: TGI 2015 Q4 (July 2014 – June 2015)

Base: GB adults 2539 age 15–24, 3877 age 25–34, 3558 age 35–44, 4373 age 45–54, 4551 age 55–64, 4220 age 65–74, 1883 age 75+

Question: “What channels have you used to respond to addressed and unaddressed mail in the last 12 months?”

WE CAN HELP YOU GET MORE FROM YOUR INVESTMENT IN MAIL

At Royal Mail MarketReach we have a dedicated team of media specialists, planning professionals and data experts ready to share their knowledge and expertise.

With a deep understanding of direct mail in all industry sectors, they're ideally placed to apply their insights to your business and to your particular briefs.

To talk to us about how we can help, please call our team on **0800 996 1656**.

For a deeper look at the power of mail, you can download our full series of research reports, case studies and learn more about our incentives at **mailmen.co.uk**



How consumers want brands to use mail and email together.



18 months of research into how mail enters the homes, heads, hearts and wallets of consumers.



Consumer attitudes to data privacy and giving permission.



Consumers explain what the mail they value helps them know, think, feel and do.



We have a team of media experts and data planners ready to apply these learnings to your organisation.

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