



MAIL'S ROLE IN THE DIGITAL AGE

**Re-evaluating the role of mail in the
multi-channel communications mix**

Australia Post commissioned this research to better understand
mail's role in an increasingly digital world

EXECUTIVE SUMMARY

In an increasingly fast-paced and technology-dependent world, marketers should adapt to constant change and master a myriad of new communications channels. Pressure for speed to market and a demonstrable return on investment are ever present.

Organisations have moved, or skewed, marketing budgets towards digital communications in order to realise tight targeting, fast turnaround and accessible performance metrics. Marketing teams have been restructured around channel, often resulting in a siloed mentality—with mail considered a lower priority, given the belief that digital channels offer cost-effective substitutes.

This reallocation of marketing budgets has seen investment diverted away from traditional channels, mail included. Despite its inherent qualities of permanence, trust and assurance, many businesses have questioned if mail still has a role to play in the marketing mix, or if digital communications have replaced the need for mail entirely.

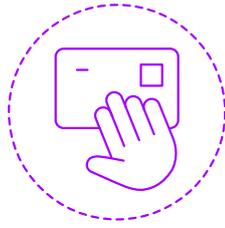
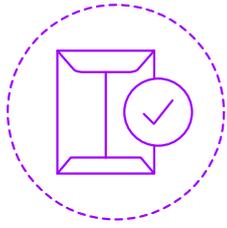
But has this shift towards digital and short-term results been to the detriment of longer-term brand engagement and trust? And are organisations in danger of losing the knowledge and skills to utilise mail as part of the communications mix?

It is as a result of factors like digital overload and safety concerns that trust in digital and response rates remain low. Given this, it seems fitting to question whether the reliance on and utilisation of digital channels has indeed delivered greater results, or proven overall to be a more effective marketing strategy.

This led Australia Post to commission Accenture to undertake research into the role and value of mail as a channel to better understand its unique qualities as part of the communication mix. The findings suggest mail has a distinct advantage, particularly over digital channels.

Not only is mail more likely to gain the attention of recipients than email, but findings suggest it has a role to play in building brands and adding value to customer relationships that email fails to match. Specifically:

- In an age of information overload with consumers overwhelmed by inbox clutter, mail stands out and captures people's attention.
- Receiving mail helps people feel significantly more valued and important than email. This suggests mail can play a role in creating and enhancing consumer relationships despite, or perhaps because of, digital's dominance.
- Mail helps build brand trust significantly more than email. Not only does mail lend credibility to a message, it also confers greater levels of trust on the sender than email.



Mail's strengths also offer more immediate, short-term benefits:

- Mail continues to be an effective driver of direct response. A significant number of survey respondents made a purchase as a direct result of receiving mail.
- Importantly for e-commerce businesses, mail is shown to drive online behaviour. A large proportion of respondents confirmed they made online purchases as a result of mail-driven offers.
- Analysis of the survey data reveals a causal relationship between three of mail's qualities and the likelihood recipients are expected to take action. The inherent trustworthiness, sensory dimensions of tactility and the affirmation experienced in relation to the receipt of mail are examined in turn and their potential applications discussed in our report.

These findings were witnessed across demographics. Perhaps somewhat surprisingly, the power of mail resonates with younger 'digital natives' too. The likely implication? A generation that has grown up with digital communication values the personal nature and considered approach of a relevant piece of mail. And it stands out when received in the letterbox.

These findings, more broadly, support mail's inclusion in the modern-day communications mix. Mail can offer organisations a unique advantage, driving both an immediate response and building brand value—typically a long-term proposition. Whilst mail has long been known for its ability to communicate complex and sometimes lengthy information to provoke a response, it also has the ability to engender a more valued and authentic relationship—to build trust. It can deliver short-term sales activation and long-term brand building. Its 'super' power is in doing both.

That is not to suggest that mail is the answer to all marketers' challenges. Rather, mail has a role to play in a balanced multi-channel mix to enhance and build relationships across the customer life-cycle. Marketers can take advantage of the complementary and synergistic effect between digital and mail to enhance their communications mix and balance short-term results with long-term brand building.

INTRODUCTION

In today's fast-paced and ever-changing business environment, technology, data and digital disruptors are changing the way brands engage and communicate with customers.

Technology has accelerated our ability to collect, store and use data to target, personalise and track communications. In tandem, it has fuelled the volume and velocity of marketing messages. As organisations capture more data to deliver increasingly tailored messages, personalisation risks becoming invasive and consumers' mistrust of communication intent increases.

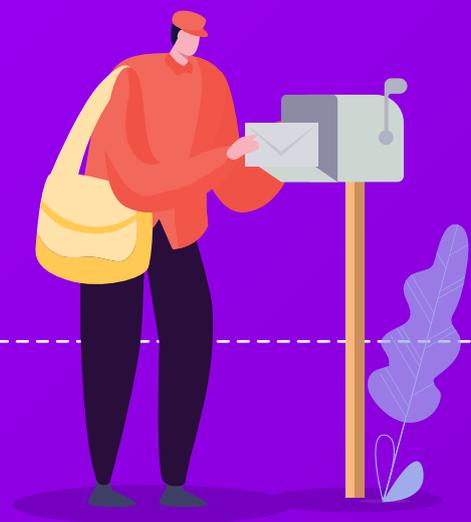
In turn, it's getting harder for organisations to cut through the noise and reach the right audience, at the right time. The proliferation of marketing messages has resulted in a "dramatic escalation in the rate at which people disconnect, unsubscribe and opt out" from digital communications.¹

Meanwhile, a 2015 Canada Post study considering the cognitive load, motivation and attention duration of marketing found that mail "requires 21% less cognitive effort to process than digital media", implying it is both more memorable and easier to understand.²

There is an increased recognition that the impact of technology, together with the pressure of providing a return on investment, have led to a focus on short-termism at the expense of brand building and creating meaningful engagement with the end customer.

This led Australia Post to commission Accenture to undertake research into the role and value of mail as a channel to better understand its unique qualities as part of the communication mix. The findings suggest mail has a distinct advantage, particularly over digital channels.

Accenture surveyed 2,015 Australian consumers on their views of the value and impact of mail in their lives and their decision making and supported this with 90 individual interviews.



More importantly, we now understand why mail has the impact it does, and how its unique attributes can provide invaluable support to brands that other channels cannot. We're able to help brands with new insights, and a new model on how best to use mail. We also debunk the myth that millennials only consume and respond to digital communications.

When marketing budgets need to achieve more for less, mail has the ability to extend brand reach (including consideration and preference) and deepen trust and engagement. This means that it should be a consideration in every marketers' channel mix.



RESEARCH METHODOLOGY

Accenture conducted a detailed review of existing literature on the value consumers place on mail. Using the resulting insights, a bespoke consumer survey was given to 2,015 Australian consumers, exploring their views on the value and impact of mail in their lives and on their decision-making. Subsequently, and to complement this, a qualitative survey based on 90 individual interviews with consumers sought to shed further light on their deeper perspectives and attitudes to mail.

A more detailed explanation of the methodology used is shown in the Appendix.

WHAT MAKES MAIL SPECIAL?

By investigating consumer attitudes to mail, the research reveals mail's strengths as a channel of communication. Comparing mail to email, in many respects its closest substitute, facilitated the study to help assess mail's uniquely valuable role and to identify potential applications in the marketing and communications mix.

The propositions that underpin mail's value have been grouped into key themes:



MAIL MAKES AN IMPACT



MAIL BUILDS BRANDS



MAIL RESONATES WITH DIGITAL NATIVES



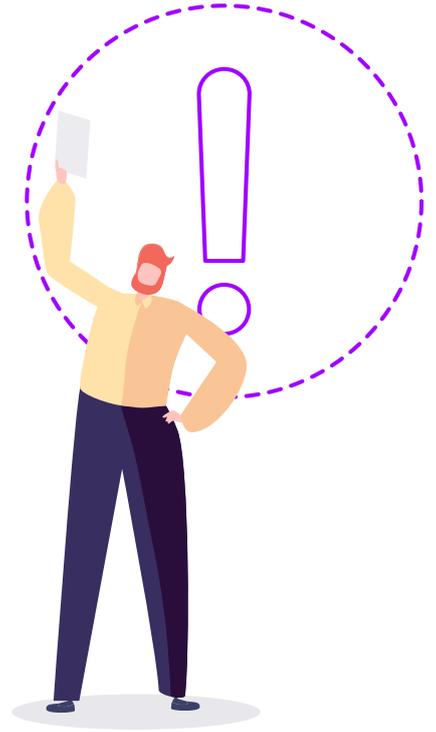
MAIL DRIVES A RESPONSE

1.

MAIL MAKES AN IMPACT

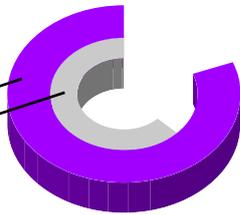
MAIL COMMANDS ATTENTION

In a time of overwhelming information, with so many channels competing for attention, mail offers a distinct advantage. The survey shows that mail distinguishes itself as a channel which commands people's attention. Not only are people more likely to read every item of mail than every email, they are more likely to do it immediately and with their full attention. More people also claim to always remember information sent in mail compared with email—a finding supported by numerous studies that show improvements in the brain's processing speed and learning performance when multiple senses are engaged.



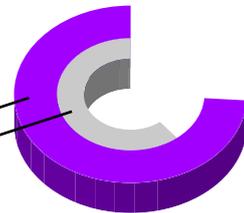
Open and read immediately

81% mail
63% email



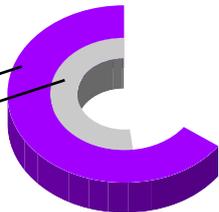
Give complete attention when reading

74% mail
61% email



Read every item received

65% mail
52% email



Always remember the information contained

54% mail
42% email



“ When I get a letter, I’m probably a lot more likely to actually read it and probably engage with it. Whereas, when I receive an email, I’m probably a lot less likely to go to the effort of actually reading it in proper detail.

Male, 26 years

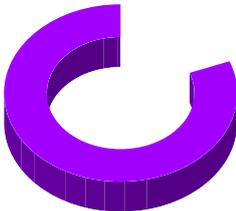
MAIL HAS A UNIQUE PLACE IN THE HOME AND RESONATES THROUGHOUT THE HOUSEHOLD

People see mail when it arrives, keep it in a dedicated place and appreciate being able to have it on hand for later reference. What's more, mail is often shared with the household, either directly or by putting it on display in the home. Thus, mail occupies a prominent position within the household, to a degree that cannot be matched by other channels of communication.

Have a dedicated place to keep mail in the home

81%

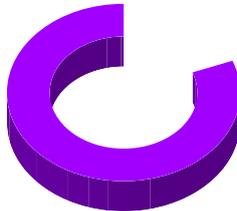
mail



Agree it's valuable to have hard copies of important information

84%

mail



Always display mail containing important information in the home

58%

mail



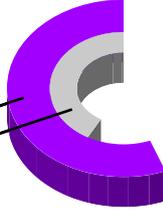
Always share with other members of the household

56%

mail

42%

email



“ A letter you can just share with anyone...with your friends and kids and family, easy as that.

Male, 26 years

“ I prefer physical mail for really important things, but digital mail for other things.

Male, 45 years

“ Particularly things like bank statements or tax returns...all the important documents that you want a copy of.

Female, 48 years

“ I can easily file it away and store the statements and then refer to them later if I need to, especially around tax time and things like that.

Female, 36 years

SUMMARY

Given its ability to grab and hold people's attention, mail is well suited to communication that is complex or multi-layered. Similarly, new brands or products, or those from low involvement categories can benefit from mail's superior cut-through and memorability.

Mail also offers a unique means of transmitting important messages into the heart of the home. Products or services consumed by multiple members of the household, or organisations conveying information relevant to entire households (such as from local governments or public agencies) can benefit from this. Similarly, products whose purchase decisions involve multiple family members should consider mail's ability to extend its reach beyond a single recipient.

When an organisation's message is imperative, such as important announcements, mail provides greater certainty that the audience would not only receive the message, but that they would give it their full attention. Similarly, when it comes to information that may be needed for future use, such as financial statements or account summaries, mail provides a useful and easily referenced document.

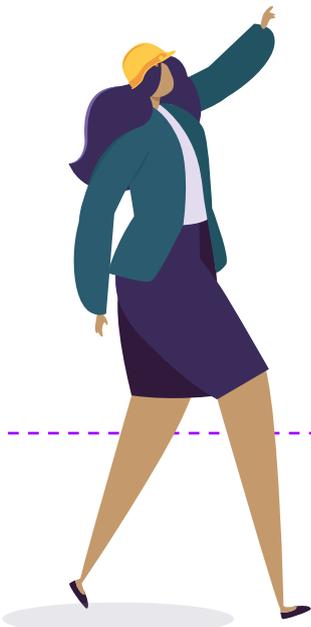
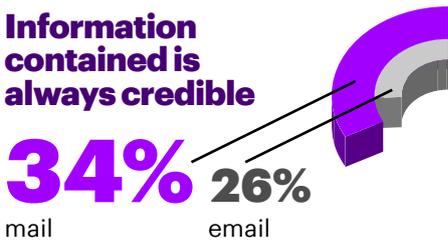
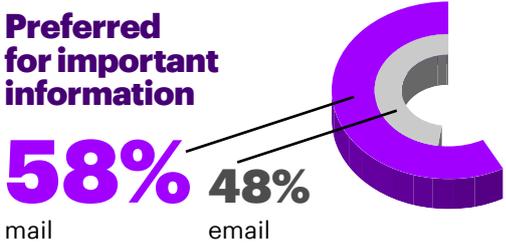
The message is clear: mail makes an impact. For organisations that need to make sure their message is received and understood, mail offers a reliable way to get consumers' attention and gain their full understanding.

2.

MAIL BUILDS BRANDS

MAIL IS TRUSTED AND CREATES CREDIBILITY FOR ITS MESSAGE

Mail can be an important means of building trust with consumers. Not only do the majority of survey respondents prefer mail for important information, but many agree that the information contained in mail is always credible. Mail also confers trust on the sender. In other words, compared to email, mail is more likely to give credibility to a message and trust to a brand.



“ Most people trust information that comes in the mail more than what’s in email. I think it’s just the time and the effort that it takes to put together a letter. Email is just so easy to send in bulk. Type it once, press the button and it’s done. It feels really mass produced, and it doesn’t instil as much trust.

Female, 45 years

“ It [mail] seems just a bit more legitimate. Someone’s taken the effort to put together a letter and put it in an envelope and post it. So it’s just a bit more trustworthy, as opposed to an email, which is just sort of randomly sent.

Male, 40 years

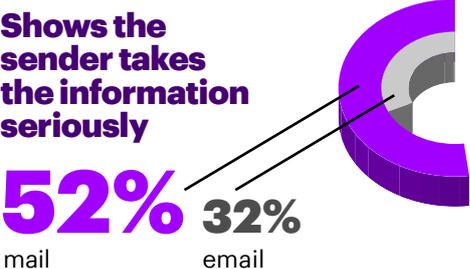
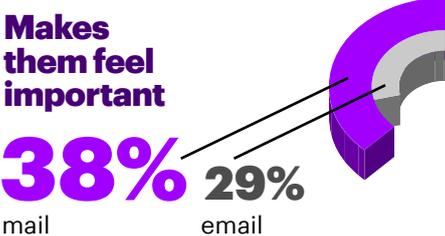
“ When I receive information online from companies, I don’t always trust it at first... So when a company actually takes the time and sends things physically to me, such as through mail, it shows that usually they are an established brand.

Male, 20 years



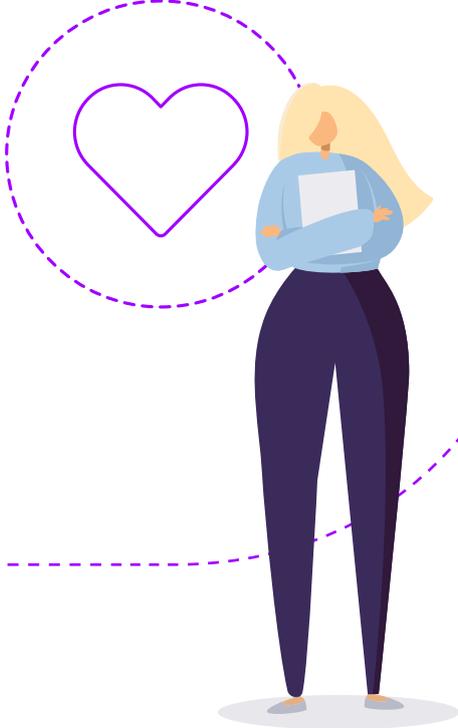
MAIL CREATES AN EMOTIONAL CONNECTION

Mail can create a strong emotional connection. Consumers feel valued and important when a company takes the trouble to send mail. The extra effort involved indicates to the recipient that the sender places value both on the message and on their relationship, compared to email.



“ People feel a little bit more special, because the organisation has been willing to spend money on sending them something, rather than just doing quite an impersonal all mailout via email.

Female, 35 years



“ Upon opening the letter you can see it’s from that organisation, that company, and it gives you a sense of worth that the company knows you.

Female, 26 years

“ I feel like with the post, when you receive a letter, it feels more authentic and professional and personable.

Male, 26 years

SUMMARY



Mail not only gives credibility to a message, it also builds trust in a brand. By using mail to reinforce their trusted status, brands with high trust can consolidate their advantage over their competition. On the other hand, companies experiencing trust issues, or looking to engage with customers after something has gone wrong, can use mail to start to repair damage and build goodwill.

When a customer is at risk, or when acquisition costs are high, businesses can use mail to help emphasise the importance of valuable customers. Organisations entering a new market or promoting a new product should also consider how mail can help to give their message credibility and build brand trust.

Businesses looking to create an emotional connection with a consumer should bear in mind that sending mail is likely to bear greater value to the recipient than an email or digital communication does. Mail is more personal, and thus more considered. It signals that the recipient is valued by the sender more than email does.

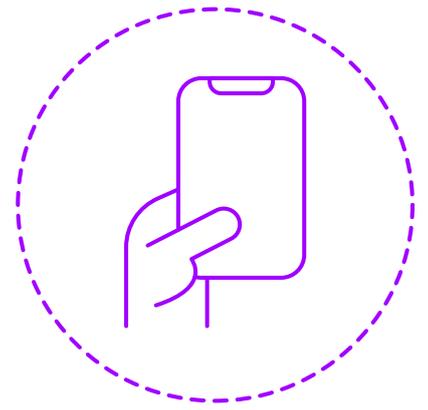
While email is quicker and more easily personalised, mail can better build brands and enhance the customer experience.

With sustained investment in technical capabilities, many organisations now provide digital customer experiences that meet customer expectations, but also tend to look and feel the same. To truly differentiate themselves, organisations would do well to consider how mail can be used to augment their customer experience and provide more valuable engagement at key times.

Mail, as part of a multi-channel programmatic campaign, also facilitates organisations to combine the benefits of digital and print communications by triggering a mail message when email or digital retargeting has ceased to provoke a response. Sending mail can often cut-through where repeated digital messaging fails.

3.

MAIL RESONATES WITH DIGITAL NATIVES



One might assume that a preference for mail is the preserve of older consumers. Not so. The research reveals that digital natives — people who were brought up during the age of digital technologies — appreciate mail’s value, often more than their older peers do.

It seems that despite having grown up with digital technology and communications, these ‘digital natives’ are likely to trust mail and to feel important when receiving it. This affinity translates into action: digital natives are slightly more likely to have made a purchase as a direct result of receiving mail, despite the likelihood that they are less likely to be targeted by mail than older peers.

Trust mail

56% 18–34
year olds

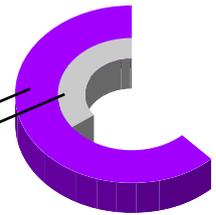
30% over 35
year olds



Feel important when receiving mail

62% 18–34
year olds

35% over 35
year olds



Have made a purchase as a direct result of being sent mail

46% 18–34
year olds

40% over 35
year olds

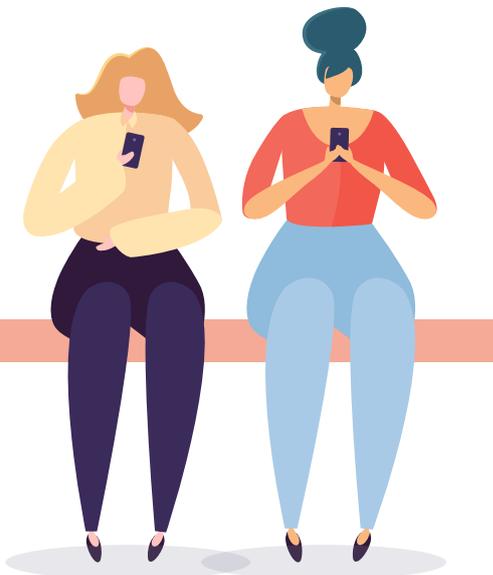


“ I like the physical nature of the mail because it feels like it’s a more, I suppose, genuine, authentic experience. So it’s quite exciting, actually, when you get a letter in the mail.

Male, 26 years

“ When information is sent in the mail it seems like something... they’ve gone through all the effort to type it up and actually print it. It seems like something that would be more legitimate, compared to something that they’ve just quickly copied and pasted in an email.

Female, 19 years



SUMMARY



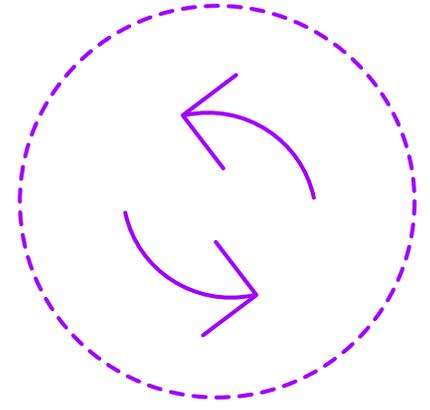
Organisations looking to attract people aged 18 – 35 years old should consider mail in their marketing mix as this audience of ‘digital natives’ particularly value mail. Indeed, as their lives become increasingly digital, we can anticipate opportunities for more impactful mediums, like mail, to continue.

Mail’s signal to the recipient goes beyond the written word. It confers a value on the relationship to which the younger generation is especially sensitive. Businesses focused on lifetime customer value should consider mail’s role in building and maintaining relationships in general, but among younger consumers in particular.

Organisations attempting to reach younger audiences by using digital at the expense of ‘traditional’ channels may be missing an opportunity. Mail can drive purchases, build trust and communicate value to this often hotly-contested and hard to reach audience segment.

4.

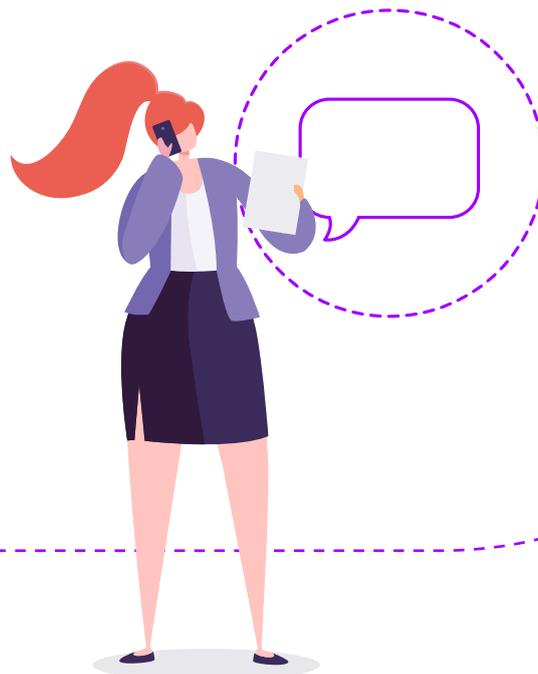
MAIL DRIVES A RESPONSE



Our study demonstrates, mail can play a valuable role in the communications mix. It holds a special place in the home. Its ability to command attention and create an emotional connection make it a highly effective channel capable of creating and affecting a lasting impact, even for younger, more digitally-savvy audience members.

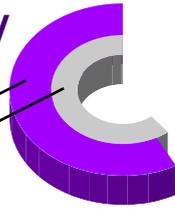
The research also highlights the capability of mail to drive direct response. 58% of respondents agreed they would likely make a purchase or follow-up on a relevant offer contained in mail; on par with email at 61%. When it comes to actual purchase behaviour, the research found 43% had made a purchase as a direct result of receiving mail. Crucially, nearly three-quarters (74%) had purchased online, highlighting the close interplay of digital and non-digital channels in today's patterns of consumer behaviour.

In addition, of those who had made a purchase as a result of mail, nearly two-thirds had done so within a month of receiving the mail. This further supports mail as a direct driver of purchase both online and offline and in a reasonably quick time frame.



Likely to purchase / follow-up on an offer

58% mail
61% email



43%

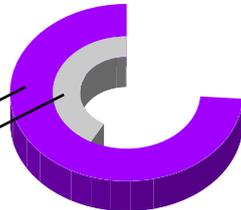
made a purchase as a direct result of receiving mail



Where

was the purchase made?

74% Online
47% In-store



When

was the online purchase made?

60% 1 Month ago
20% 3 Months ago



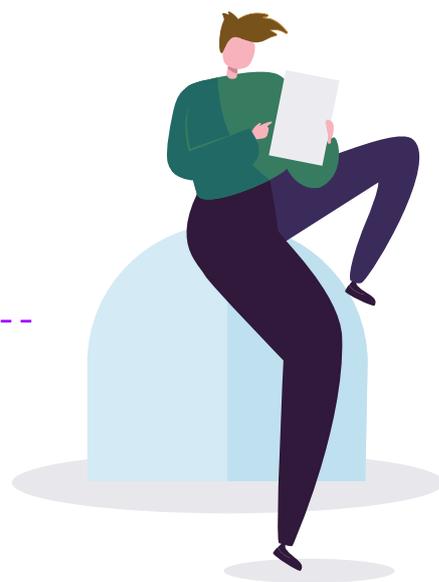
HOW CAN MAIL BE MORE EFFECTIVE TODAY?

A MODEL FOR ENHANCING MAIL'S IMPACT

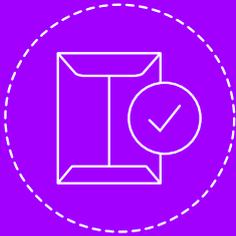
These are valuable insights for organisations and they raise a key question: how can mail communications be enhanced to better prompt people to respond?

The study investigated the causal link between mail's attributes and its efficacy as a direct response communications channel. That is, the likelihood mail will prompt recipients to make a purchase or follow-up on information contained within.

Analysis has identified three attributes that positively correspond with mail communication's efficacy in driving a direct response. They are: **trust, tactility and personal affirmation.**



VALUE ATTRIBUTES OF MAIL - MODEL



TRUST

The degree to which information in mail is trusted.



TACTILITY

The degree to which consumers perceive value in information being sent in tactile form.



AFFIRMATION

The degree to which consumers are made to feel 'valued' and 'important'.



EFFICACY OF MAIL

The degree to which consumers take action (follow-up / purchase).

In the following pages we describe the three mail levers—trust, tactility and affirmation—in more detail and suggest how businesses can apply these to improve the efficacy of mail communications.

1. TRUST

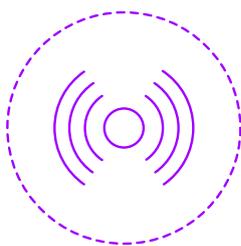
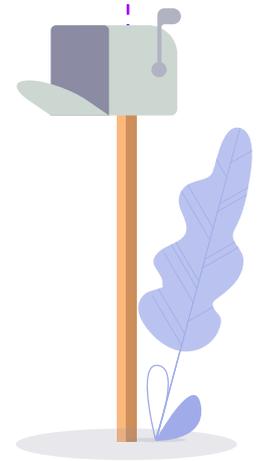
“ I think the reason why people of all ages trust original mail is that it’s been sent by a service such as Australia Post, or it’s been couriered, and it’s probably more confidential. It’s more personalised and I think that’s why people like to receive something like that.

Male, 50 years

The online world is increasingly rife with scams and in this context, mail may provide an avenue to cut through the clutter and engage with consumers in a channel that’s seen to be more trustworthy.³ Indeed, the inherent trustworthiness of mail is a big advantage in an era where trust is both critical to success, and in short supply.

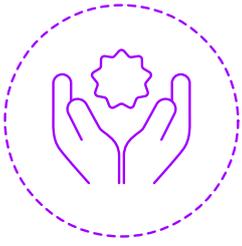
Our analysis suggests that it is possible to increase the effectiveness of mail campaigns by increasing consumers’ levels of trust. That is, the more trusted a piece of mail is, the more effective it will be at generating engagement and eliciting a response.

So, how do companies improve the trustworthiness of their mail? Here are some recommendations:



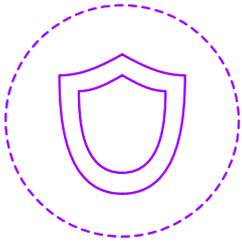
USE TRUST SIGNALS

‘Cues’ or ‘signals’ that identify brands can be important in lending trust and credibility to communications. The use of icons, logos and brand colours can be used as ‘short cuts’ to sender identification, particularly for brands with well-established identities. It can also be important when communicating with existing customers who are more likely to open mail from a company with whom they have an existing relationship.



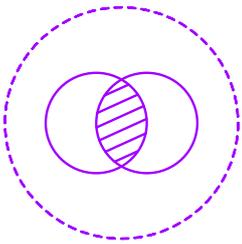
BE CONSISTENT WITH YOUR BRAND VALUES

A mail message is more trustworthy if it is consistent with an organisation's values and behaviours. For example, when brands espouse high ethical and moral values but produce goods that use unethically sourced raw materials, consumers would perceive the contradiction as a false promise, thus affecting trust.



PROJECT AUTHORITY

Organisations can also project authority and credibility through the use of letterheads and by incorporating a more traditional salutation and signature. This can work effectively for some types of messaging but, given its formality, may be less effective for other communications or for different target groups.



BE TRANSPARENT

Whilst the element of surprise can be effective in encouraging recipients to open and respond to mail messages, transparency of communication helps build trust. Mail that features a clear value proposition or offer, is easy to understand and contains a compelling call-to-action is likely to be more effective in eliciting a response.

Additionally, transparency can extend to marketing materials through the use of customer testimonials. These might further instil trust in the message and increase the likelihood consumers would respond.



I think that's the main reason why people do trust companies more when they send out physical correspondence and information because it does show that they must be an established brand because they can fund that sort of behaviour.

Male, 20 years

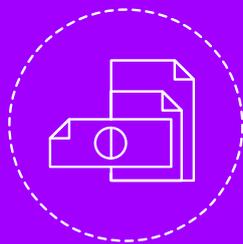
2. TACTILITY

“ I can't touch an email, I can't physically sort that into a pile that I want to keep as a record. So when you do have physical mail, it's something you can touch, it's tangible, it's really an extra sense that you can add to that correspondence or information.

Male, 20 years

Mail is uniquely tactile. It's tangible. It's received, opened and felt. It can have an extended shelf life and viewing can be easily shared with others.

Organisations can use mail's physical qualities in creative ways that go beyond simple combinations of colour, typography and imagery. Mail is highly customisable and there are multiple ways to help improve the tactility of mail campaigns and therefore increase the likelihood of a direct response:

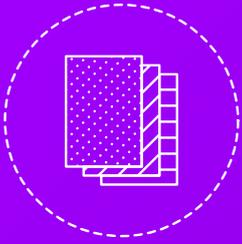


MULTIPLE FORMATS AND CUSTOMISATION

Different formats and techniques, from simple postcards to more complex 3D custom designs, have the ability to capture imagination and engage recipients. Marketing technology and digital printing provide organisations with the ability to bring to life their mail in a multitude of different ways. Mail can be tailored to suit more complex messaging, or tell enough of the story to create relevance and link people to deeper engagement elsewhere.

“ I absolutely prefer physical mail. I think that receiving physical mail is similar to receiving a gift and that's why people are so interested in it. I like being able to read something in my hand rather than digitally and I think it's very interesting to be able to look through things and touch them in your hand.

Female, 19 years



INCREASE TACTILITY

Use of different materials can help improve tactility with the use of different styles of paper or card. Paper weight and finish can also help influence overall impression. For example, organisations seeking to reinforce a proposition around low cost and efficiency may choose to use a simpler, less embellished look and feel than more luxury or premium brands and products. Different paper sizes and orientations can also be used to build the story and expand or reveal the message and offer, leading to greater engagement.



EXTEND 'SHELF LIFE' AND RESPONSIVENESS

Inclusion of a memento or useful element in the mail pack can encourage the recipient to retain the information for longer. Coupons and vouchers, brochures, calendars and 'key dates', or even contact information in the form of a magnetic card to be stuck to the fridge have all been used very effectively as a visible reminder of the call to action and to increase response.



ENGAGE THE SENSES

Sensory enhancements such as scent, sound and texture can be merged with content to enrich the experience of mail and increase the likelihood of generating a response.⁴ Similarly, digital can be used to augment the tactility of mail by connecting readers with digital content and providing an even more immersive experience for the reader, increasing overall response rates. This can be as simple as including a link to supporting content online or using digital technology as an additional call-to-action channel. The creative possibility of this space provides opportunity for forward-thinking brands to get ahead of the competition with a smart blend of digital technology and mail.

3. AFFIRMATION

“ I actually feel more valued by an organisation when they send me mail, because you know that they’re making the effort to think of you and go to the post office and send it out to you, and you mean something important to them and their business.

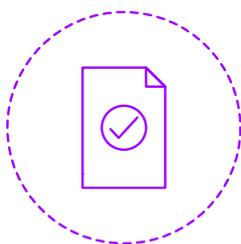
Female, 35 years

Our model shows that mail’s likelihood of driving a direct response increases with its ability to make recipients feel valued and important.

For many, the simple act of receiving mail makes them feel valued. In an increasingly digital world, where the volume of email and digital messages is growing, the unique and personal nature of mail can cut through and provide a highly impactful experience.

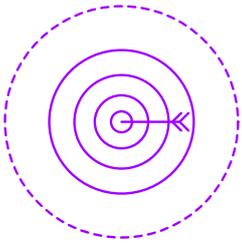
While digital marketing is rightly celebrated for its ability to deliver personalised offers, this study shows that mail too can offer a personal and self-affirming experience. Indeed, mail demonstrates a commitment to the relationship with the consumer that digital simply does not.

Here are some recommendations on how brands can use mail to provide consumers with affirmation and better drive them to act:



BE ACCURATE AND UP TO DATE

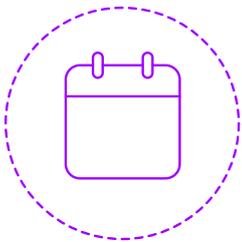
Data accuracy is key. If an email address is incorrect it ‘bounces’ and the recipient is none the wiser. In mail, small inaccuracies in personal details, such as a misspelt name or incorrect title, may easily offend the intended recipient.



BE RELEVANT TO PERSONAL CONTEXT

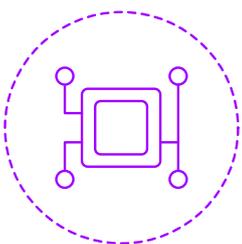
People expect that the data they provide or that is collected will be used to personalise communications and provide recommendations that are timely and tailored to their preferences. Mail has the ability to leverage this data to deliver highly targeted, relevant, timely and personal communications directly into the hands of the target audience.

Accenture's Personalisation Framework recommends that brands make sure that they recognise and acknowledge customers, remember their previous transactions and preferences, and make recommendations based on this past behaviour.⁵ By leveraging this understanding of customers, businesses can personalise timing, frequency, message and offer to create more relevant and engaging dialogue. Data and digital technology assist mail in being able to deliver this.



UTILISE KEY MOMENTS

Acknowledging key moments, such as a customer milestone or an anniversary, or even the power of a simple 'thank you' delivered through mail—an inherently personal form of communication—cannot be underestimated. Mail has the power to present this as an individualised communication that's highly personal, especially compared to an automated trigger email for example.



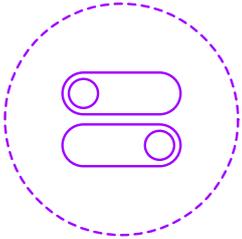
COMBINE DIGITAL WITH MAIL

Automation combines the power of digital marketing with mail. Data, combined with sophisticated marketing technology and digital printing capabilities, provides organisations with greater power than ever before to produce highly targeted and personalised mail. Research conducted by Canada Post and Ipsos* has also found that, when digital campaigns integrate mail, attention (time spent) increases by 39%, brand recall is 10% higher and a 5% stronger emotional response is achieved than via single-media digital campaigns.⁶



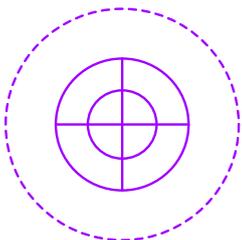
I think when you get something arrive in the mail that's addressed personally to you, you've been singled out, you've been given special attention about whatever the issue is.

Female, 43 years



RE-ENGAGE INACTIVE OR LAPSED CUSTOMERS

The personal nature of mail helps it to cut through to reach people who have 'tuned out' to digital communications. As an inherently personal and trustworthy channel, mail may also infer that the company is 'going that extra mile' to try to re-engage the customer in ways that other channels may not.



TARGETED MAIL FOR ACQUISITION

For new customer acquisition, brands can take advantage of data mapping tools based on customer insights including basic geodemographic information as well as powerful psychographic data such as lifestyle, attitude, behaviour and values. This data can be leveraged to craft messaging and offers ensuring greater relevancy for the target audience. Businesses can also segment the data to develop offers and messaging that is specifically relevant to each group, ensuring greater effectiveness of their communications.



It feels more personal than an email. Emails can be sent to multiple people at the same time, where a letter can be addressed to a person. It is more personalised to them so people can feel like it is actually the company taking more notice of them.

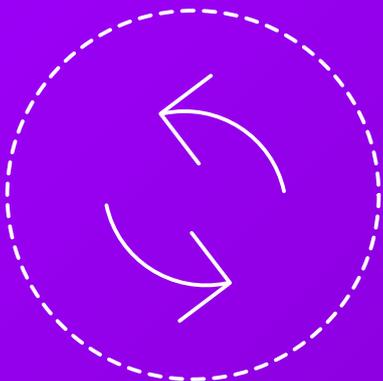
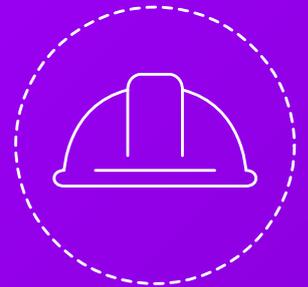
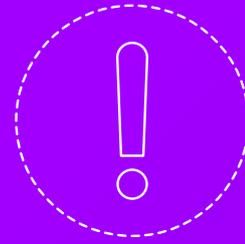
Female, 34 years

MAIL MATTERS

Mail is still highly relevant for communicating with consumers. It retains a unique set of attributes that help brands cut through in a world clamouring for attention. The continued relevance of those attributes, and mail's ability to leverage trust, tactility and self-affirmation correlate with mail's ability to drive direct response from recipients, prompting a purchase.

This report confirms that mail remains an important channel consideration of the communications mix for organisations of all sizes. Whether it's capturing consumer attention, getting into the heart of the home, creating an emotional connection, imparting a trusted message, or resonating with a digitally-jaded younger generation, mail can deliver in ways digital channels can't match.

Mail provides organisations with the ability to complement their multi-channel communications mix and create more powerful and engaging messages that build brands and generate response.



APPENDIX: RESEARCH METHODOLOGY

Over the past three months, as part of the research commissioned by Australia Post, Accenture has investigated the value attributes that differentiate mail from email and developed insights into how to build effective mail strategies. Specifically, we developed a four-stage process that spanned: literature review, survey design, survey data analysis, and a consumer qualitative survey. Each stage cumulatively built on the information from the previous stage.

1. LITERATURE REVIEW

A broad review of literature published by industry peers and academics was used to set a baseline to build on. While the practitioner literature was used specifically to understand the breadth of work already done in the mail domain, the academic literature was used to understand general consumer value frameworks that could be tailored and customised to mail usage.

2. SURVEY DESIGN

Synthesis of the literature review informed the focal research question, which eventually helped design a 70-question survey instrument that aimed to collect consumers' mail usage preferences and behaviours with a direct comparison to email. The survey was administered through an online link and was designed to take around 10–15 minutes to complete. The survey was advertised to 3,332 respondents after taking into consideration equal representation of gender, age and regional quotas. Removing respondents who did not complete the survey and those who failed our screener question resulted in a final sample size of 2,015 respondents.

3. SURVEY DATA ANALYSIS

The analysis of the survey data spanned two phases

a. Factor analysis

Factor analysis is a technique used to identify underlying patterns or relationships for many variables and assess whether the information can be condensed to a smaller set of macro variables or factors. Primary factors identified in this study were—Trust in mail, Trust in email, Tactility of mail, Personal affirmation, Privacy disposition, and Shareability.

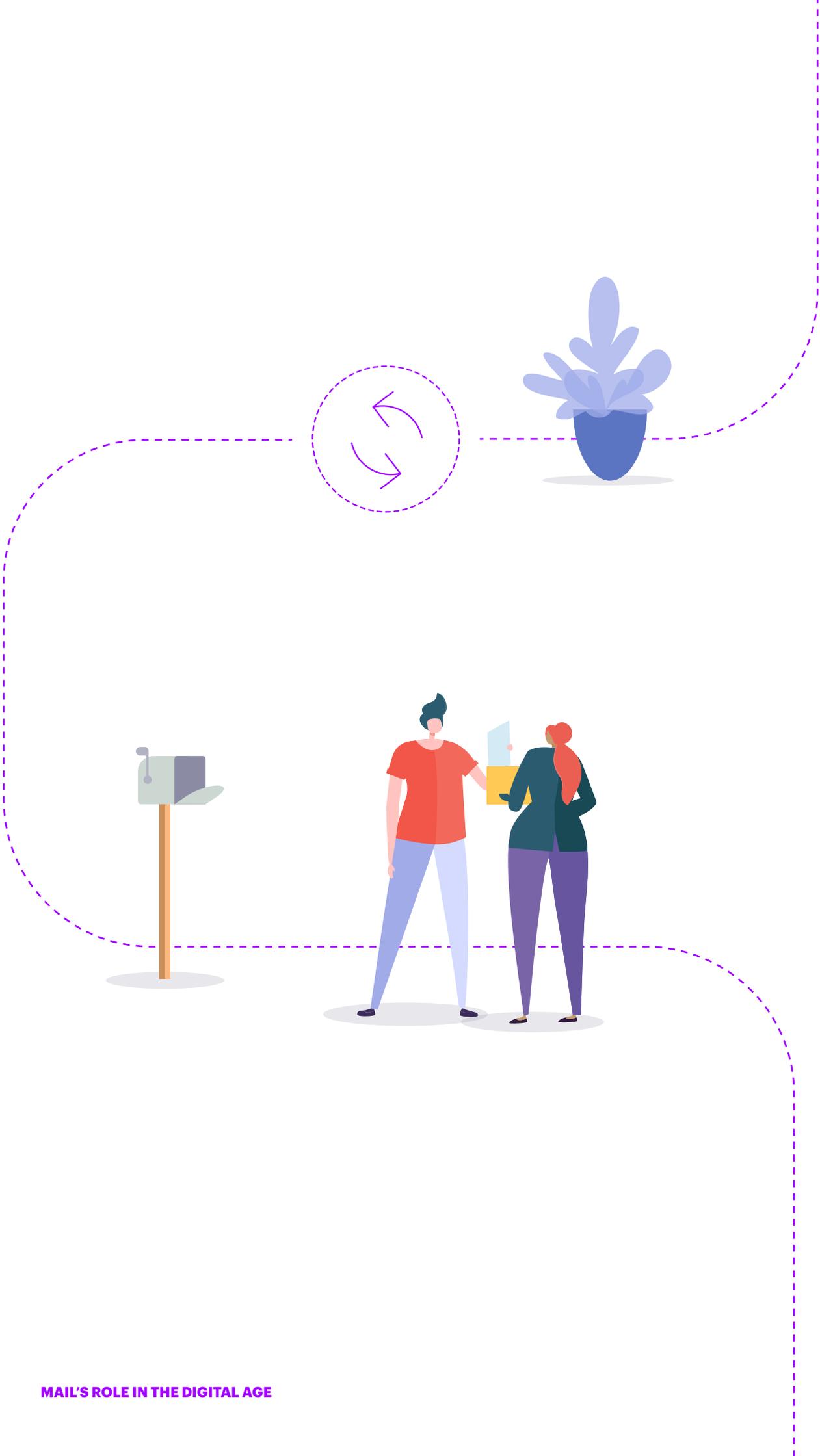
b. Regression analysis

Multivariate regression was used to establish causal links between 3 value attributes of mail—Trust in mail, Tactility of mail, and Personal affirmation—and the effectiveness of mail. Gender, age, and regional variables were used as control variables. As a comparison, we also tested but did not find a causal link between attributes Trust in email and Personal affirmation and the effectiveness of email.

4. CONSUMER QUALITATIVE SURVEY

Additional data was collected to validate the main findings from survey data analysis. We interviewed 90 consumers who gave their opinion on the value attributes of mail we used in the regression analysis. We then used qualitative thematic coding to identify the main themes that emerged in consumer responses.

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1. https://trends.fjordnet.com/Trends_2019_download.pdf
 2. https://www.canadapost.ca/assets/pdf/blogs/CPC_Neuroscience_EN_150717.pdf
 3. <https://theconversation.com/trust-in-digital-technology-will-be-the-internets-next-frontier-for-2018-and-beyond-87566>
 4. <https://postpressmag.com/articles/2016/usps-promotion-targets-the-senses>
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 6. Canada Post and Ipsos, Connecting for Action Whitepaper, January 2017



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Australia Post commissioned this research to better understand mail's role in an increasingly digital world.



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