

# BREAKING THROUGH THE NOISE

How direct mail combines the intimacy of ritual, the impact of physicality and the power of data-driven relevance to send a signal that resonates.

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June 30, 2015





# ABSTRACT

It's noisy out there, and every brand vying for consumer attention knows it.

To understand how direct mail can help them break through this noise, Canada Post commissioned a major ethnographic study that explored how it factors into the lives of today's consumers and thereby influences the purchase journey.

Through this study, and reinforced by a series of additional Canadian consumer surveys and global research into the topic, they found that by combining the intimacy of ritual, the impact of physicality and the power of data-driven relevance, direct mail can mean the difference between contributing to the noise and breaking through it. It helps brands stand out (consumers are far more likely to **notice**, **open** and **read** it); trigger emotional responses (consumers tend to experience it in a mindset that makes them more open to inspiration from brands); generate a lasting effect (consumers often **keep** it, **display** it in highly visible areas of the home and **share** it with others); and, perhaps most importantly, influence consumer behaviour (consumers are more likely to action it than digital advertising).



# INTRODUCTION

## The average consumer's attention span is 8 seconds.

In 2000, it was 12 seconds. To put this in context, the average attention span of a goldfish is 9 seconds.<sup>1</sup>

So, what's compressing consumer attention? Content overload, and the constant noise that comes with it.

The volume of content that consumers are exposed to, and the pace at which they're consuming it, has never been greater. In fact, 90% of the world's data has been generated in the last two years alone.<sup>2</sup>

The only way for brands to break through this noise is to differentiate. This means they need to know (*really know*) their customers, and serve them experiences that are unique, personally relevant, meaningful and memorable.

In the quest for differentiation, can the channel in which a message is delivered mean the difference between adding to the noise and rising above it? Canada Post wanted to find out. So they partnered with leading market research consultancy Phase 5 on a two-part, Canada-wide ethnographic research project that explored how physical and digital mail factor into the lives of consumers – and how the visibility, longevity and overall impact of each channel compares to one another.

Through this paper, Canada Post details the findings of this research – as well as a series of additional Canadian consumer surveys and global research into the topic – and explores their implications for customer relationships, brand value and sales.



# METHODOLOGY

The findings in this paper were drawn primarily from a qualitative, Canada-wide

ethnographic study commissioned by Canada Post and conducted by market research consultancy Phase 5.

This foundational study inspired an in-depth review of related secondary research focused on consumer attitudes towards and responses to direct mail – including, but not limited to, various Canada Post-commissioned consumer surveys, Canadian consumer insights from independent market research companies, and direct mail studies from postal agencies around the globe. Qualitative and quantitative findings from this body of research are referenced throughout this paper.

# What is ethnographic research?

**Ethnographic research** is an observational research methodology for learning about human cultures that originated in **anthropology**. Rather than ask specific, highly practical questions, ethnographers observe their subjects in an open, non-directed way. They focus on both the “what” that happens (behaviour) and the “why” that underpins it (context).



**Ethnographic research** is an observational research methodology for learning about human cultures that originated in anthropology.

**Anthropology** is the study of humans.

A **customer journey** is the total experience that a customer has with an organization, from initial point of contact through to post-purchase.

## Ethnography use cases

Arnie Guha, Ph.D., Phase 5 Partner-in-Charge and recognized user experience expert, notes that ethnography is becoming a hot topic in the marketing community lately. “We’ve been doing a lot of this research for Tier 1 banks through some of the world’s largest retail chains and media organizations,” he says. “One of the reasons for this is that organizations are recognizing the need to more fully understand their **customer journey** – where their organization lies in the overall flow of their customers’ lives, what types of interactions their customers have with them, which of their customers’ needs are being fulfilled or unfulfilled, and so on.” Guha adds that in business, this insight is used to inform everything from process improvements to product innovation, marketing and long-term strategy development.

Canada Post chose this research approach because they wanted a thorough view of the mail journey – the way consumers behave towards it, the attitudes and emotions they associate with it, and the context in which they interact with it – in order to understand what this mode of customer communication means for brands.

# Research approach

Through this ethnographic research project, Canada Post and Phase 5 examined the consumer's mail management experience across physical mail, email and social media (Facebook), with a primary focus on promotional messages. This study was conducted in two stages:



**Eye tracking** tests measure the gaze and movement of the eyes using a small, specialized camera.

## 1. In-person observation of mail management rituals and habits

The physical and digital mail sorting behaviour of participants was observed via **eye tracking**. Eye tracking tests seek to understand how people interact with stimuli by measuring the gaze and movement of their eyes using a small, specialized camera. These tests were used to devise the hypotheses upon which the second part of the study was framed.

## 2. Semi-structured online forum with diary entries

Subjects participated in a two-week semi-structured online forum with diary entries, where they shared their responses to, behaviour around and attitudes towards physical and digital mail. This was followed by a one-week re-convened online forum to validate experience maps and other findings.

The ethnographic study included six audiences of interest:

## Three representing mail delivery types

- Home delivery
- Apartment/condo delivery
- Community mailboxes

## Three representing different age groups

- Millennials (ages 20–34)
- Generation Xers (ages 35–49)
- Baby Boomers (ages 50+)

When recruiting, the researchers ensured a mixture in terms of volume of mail, employment, household composition, education, income, language (English and French) and gender.

# IDEA IN BRIEF

We live in a world of pervasive digital interactions – a world so awash in noise that the average consumer’s attention has been compressed to just 8 seconds.

Consumers are absorbing content in a constant, fluid, channel-agnostic way, and brands vying for share of their limited attention spans have more competition than ever. To understand how direct mail can help them break through this noise, Canada Post commissioned a major ethnographic study that explored how it factors into the lives of today’s consumers, examining its visibility, longevity and overall impact in relation to digital mail.

Through this study, and reinforced by a series of additional Canadian consumer surveys and global research into the topic, they found that by combining the **intimacy of ritual**, the **impact of physicality** and the **power of data-driven relevance**:

## Direct mail...

### 1 inspires

It’s so engrained in life that consumers ritualize it. In the process, they imbue it with emotionally charged meaning, making them more susceptible to inspiration from brands.

### 2 gets noticed

Consumers are far more likely to **notice, open, read** and enjoy mail than digital forms of advertising. They consider it less intrusive, more memorable, and the best way to make them feel valued.

### 3 persists

Consumers **keep** mail, **display** it in highly visible areas of their homes, and even **share** it with others. This creates multiple opportunities for a brand to be seen and engaged with.

### 4 persuades

Whether it’s to drive a store visit or purchase, mail delivers a call-to-action that resonates.



# RESULTS



A **routine** is a sequence of actions regularly followed.

## Finding #1: Direct mail inspires

It's so engrained in life that that consumers ritualize it. In the process, they imbue it with emotionally charged meaning, making them more susceptible to inspiration from brands.

Dealing with mail is described as part of life's **routine** – a routine fixed in frequency and process, a routine so engrained and imbued with sentiment that it is often ritualized.

“When I sort through the mail I am curious to know what's inside as well as surprised when I see things I did not expect or offers that I did not know even existed.”<sup>3</sup>

## Part of the “coming home” routine

For those with a major activity away from home, such as work or school, collecting the mail is part of the “coming home” routine. Consumers with door-to-door and apartment/condo delivery tend to collect it daily or every second day, while those with community mailboxes collect it daily or every few days. Mail that is considered interesting or important is sometimes read at the mailbox or on the way back from it, while the rest is carried into the home for a more detailed sort.

The mail sort takes between two to five minutes and tends to happen in the same part of the home each day – the kitchen, home office, living room or dining room. It can be accompanied by a range of associated activities, including listening to music, making dinner, talking with family members, watching TV or waiting for coffee to brew. Addressed mail is opened and read immediately, promotional mail is filtered for interest, and items that require a more detailed read are set aside for later.

Digital (email and Facebook) mail management behaviour, on the other hand, is less routine-oriented and more fluid, with those who receive a lot of messages (particularly the younger, more connected consumers) checking their accounts often throughout the day, in various locations, using multiple devices. As one consumer put it, “I can say that unless I am watching a movie, sitting at a meal or driving or something like that, I am likely to check for new emails at least a couple of times every hour.”<sup>4</sup> The triggers for digital mail checking are also varied – from notifications to having free time or experiencing boredom.

### How long does it take to pick up the mail?

➤ Door-to-door delivery  
**Less than one minute<sup>5</sup>**

➤ Apartment/condo delivery  
**Less than three minutes<sup>6</sup>**

➤ Community mailbox delivery  
**Up to five minutes<sup>7</sup>**

## From routine to ritual

Through deep ethnographic interviews, the researchers found that this routine is so entrenched in life that it is often ritualized by consumers. “A **ritual** is a routine that we bestow with significance,” explains Guha. “For example, if I’m in the habit of sitting down with my flyers and a glass of wine every Thursday night to plan my grocery shopping for the next week, and this is an activity that I look forward to, then it’s a ritual.”

The time-honoured ritual associated with mail has important implications for brands. Every time they make contact with a customer via mail, they embed themselves within it – tapping into the emotions involved, nestling within the intimate home setting, and taking advantage of the brand reinforcement that comes with its often prolonged shelf life.

Guha notes that this ritual presents a unique opportunity for brands looking to form relationships with new customers. “We know that if an individual associates positive emotions with a particular ritual, they become much more receptive to inspiration. In the case of direct mail, this can increase a consumer’s openness to offers from brands they wouldn’t normally respond to.”



A **ritual** is a routine upon which an individual bestows meaning.

## Finding #2:

# Direct mail gets noticed

Consumers are far more likely to **notice, open, read** and enjoy mail than digital forms of advertising. They consider it less intrusive, more memorable, and the best way to make them feel valued.

Direct mail's tactility enhances a message's noticeability, extends its memorability, and imbues it with emotion and intimacy, positively influencing the way consumers feel about both the sender and their relationship with them.

“In an age where person-to-person communication is being phased out, it is good to know some services still come from the hands of another human being. Hokey I know, but I feel it's getting more and more important.”<sup>8</sup>

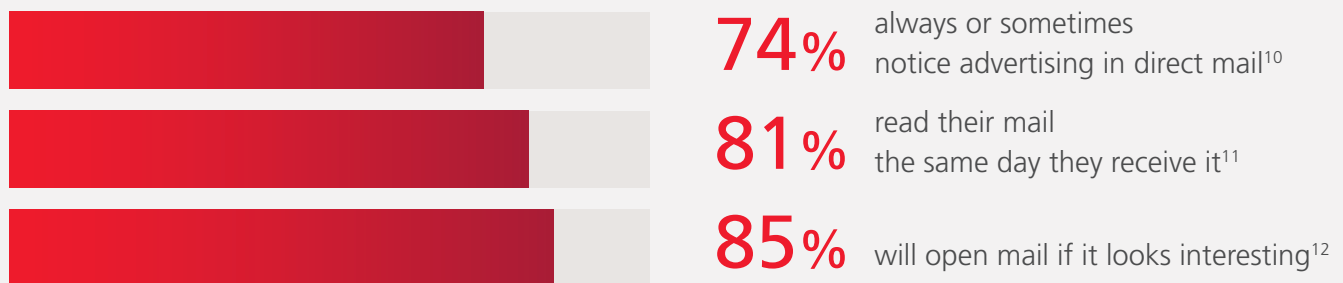
## Direct mail is noticed, opened and read

Direct mail sends a sensory signal that stimulates a deeper level of engagement than digital messages, making it much more likely to be noticed. Consumers consciously recognize the impact that mail has on their attention, stating that they are more likely to **notice** and **read** direct mail (**53%**) than email (**26%**) because, as they put it:

- "It is more tangible/physically in my hands"
- "Emails are skimmed over without opening, content is determined based on subject line"
- "More visible, do not receive a lot of mail"
- "Have to collect the mail and decide what to keep"
- "Receive too many emails and ads get lost or deleted"
- "Spend all day on a computer at work, prefer to read print"<sup>9</sup>

Even items that are discarded are noticed. The mere act of having to physically handle mail draws consumers' attention to it and, if nothing else, cumulatively builds up awareness of recurring brands.

## Consumers notice, open and read direct mail



Direct mail's noticeability and impact can even be observed and measured at the neurological level, as evidenced by a recent Canada Post-commissioned neuromarketing study ("A Bias for Action: The Neuroscience Behind the Response-Driving Power of Direct Mail" will be available through Canada Post, August 2015). The study quantified the relative effectiveness of direct mail and digital advertising media by way of their impacts on the consumer's brain, and found that direct mail outperforms digital media on the two key indicators of media effectiveness – (1) ease of understanding and (2) persuasiveness – making it more effective at driving consumer action.<sup>13</sup>

## Direct mail is memorable

Direct mail helps keep brands top-of-mind, with consumers reporting that it's the most effective way to get them to remember a product or service.

Mail's greater memorability appears to be anchored in its physicality. Not only does it serve as a visible reminder to act on a promotional message or offer, but scientific research suggests that the mere act of consuming information in print format makes it easier to digest and more memorable than when it's consumed digitally. For instance, through Canada Post's above-noted neuromarketing assessment of the comparative impacts of physical and digital media on the consumer's brain, they found that because physical media is more easily understood, it is more likely to be encoded into memory.<sup>14</sup> Some researchers posit that this is because screen-based reading is more physically and mentally taxing – and the subsequent drain on the reader's mental resources makes it more difficult for them to encode what they read into memory.<sup>15</sup> Others believe the tactile experience of reading print helps the brain form mental maps that facilitate comprehension and memory encoding.<sup>16</sup>

## Consumers remember direct mail



## Direct mail is enjoyed and valued

More than twice as many consumers say they enjoy receiving direct mail than digital advertising.<sup>20</sup> They tend to prefer direct mail for brand communications, find it inspiring and convenient for making online and in-store purchase decisions, and believe it's the most useful and effective form of advertising. Consumers are also more likely to associate feelings of happiness, excitement and surprise with physical advertisements, while digital ads are more often experienced as distracting, disruptive and intrusive.

The greater value and overall enjoyment that consumers ascribe to physical mail may be a consequence of what economists refer to as the "endowment effect." The **endowment effect** is the theory that people ascribe more value to things that they own. And research suggests that the mere act of touching an object, such as mail, results in an increased perceived ownership of that object.<sup>21</sup> So, the physical contact inherent in mail prompts consumers to assume ownership of it and, by extension, value it more highly.



The **endowment effect** is the theory that people ascribe more value to things that they own.

## Consumers welcome and enjoy direct mail

**62%**

rate catalogues and flyers the most effective media for advertising messages<sup>22</sup>

**51%**

prefer companies to use a combination of mail and email when communicating with them<sup>23</sup>

**74%**

prefer print, among multi-format flyer users<sup>24</sup>

**70%**

are curious to find out what's in their mailbox<sup>25</sup>




## Direct mail elicits positive emotional responses

Consumers interact with direct mail in an instinctive, emotionally charged way that colours how they feel about brands. They tend to have a better impression of brands that reach them by mail, and even go as far as to say that the physical qualities of a mail piece influence how they feel about the sender.

The format in which a brand makes contact also influences how consumers feel about themselves, pointing to the intimacy inherent in the mail experience. Consumers say they're much more likely to feel valued when brands communicate with them through mail than email or social media.

These findings suggest that while direct mail has long been known for its direct response-driving capabilities, it is also an effective vehicle for deepening customer intimacy and even transmitting brand values.

### Direct mail makes consumers feel valued

-  **57%** are more likely to feel valued when brands contact them through mail than email (17%)<sup>26</sup>
-  **38%** say the physical properties of mail influence how they feel about the sender<sup>27</sup>
-  **55%** have a better impression of a company if they contact them by mail than email (25%)<sup>28</sup>
-  **55%** believe that physical mail is the medium that gives the best impression of the sender<sup>29</sup>



## Finding #3:

# Direct mail persists

Consumers **keep** mail, **display** it in highly visible areas of the home, and even **share** it with others. This creates multiple opportunities for a brand to be seen and engaged with.

Direct mail is often **displayed** in prominent areas of the home, **kept** for extended periods, and **shared** with others, multiplying its value by presenting repeated opportunities for brands to be seen and engaged with.

“I will sit down and make my grocery shopping list according to the flyers. I like it because I keep them together and then put time aside to look at all of them at once at my leisure.”<sup>30</sup>

## Direct mail is displayed

Mail is often displayed as “functional art” in highly visible, common areas of the home:

- Catalogues and flyers tend to be kept in the living room
- Promotional mail is kept on the fridge or by the couch
- Restaurant menus are left in a kitchen drawers or cupboards
- Fast-food coupons are kept on or by the fridge<sup>31</sup>

Through a similar ethnographic study, UK postal agency Royal Mail identified three distinct types of storage areas for mail:<sup>32</sup>

1. A *holding area* where mail is kept before being dealt with;
2. A *pile* where mail is kept after being sorted and is awaiting action; and
3. A *display area* where useful or important items are stored, such as local information or time-limited offers.

There is significance in the centrality of mail’s display areas, explains Guha. “The fact that mail is kept in highly visible places multiplies its value beyond the immediate recipient, presenting repeated opportunities for it to be seen and engaged with.”

## Direct mail is shared

Even if a consumer finds a piece of direct mail irrelevant to their needs, they sometimes pass it along to someone else who might benefit from it. In fact, research shows that consumers are much more likely to share direct mail than digital advertisements.

## Direct mail is kept

Mail is often kept for extended periods of time – a month or longer, in the case of coupons – fast food (53%) and other (38%); restaurant menus (49%); and catalogues (35%).<sup>33</sup>

“How long a consumer keeps a mail item is indicative of its value. Mail can have both **immediate value**, for its content, and **deferred value**, as a physical artifact. That is, if an advertisement relates to a product that I’m in-market for, then it has immediate value to me. On the other hand, because it’s physical and tangible, even if it does not have immediate value to me, I might save it for someone else for whom it is relevant, in which case the mail item would assume deferred value.” – Arnie Guha.



### Immediate value

is value that is realized immediately.

### Deferred value

is value that is realized at some point in the future.

## Consumers share direct mail

**32%**

have passed a direct mail ad along to someone else – surpassing both email ads (26%) and social media promotions (22%)<sup>34</sup>

**23%**

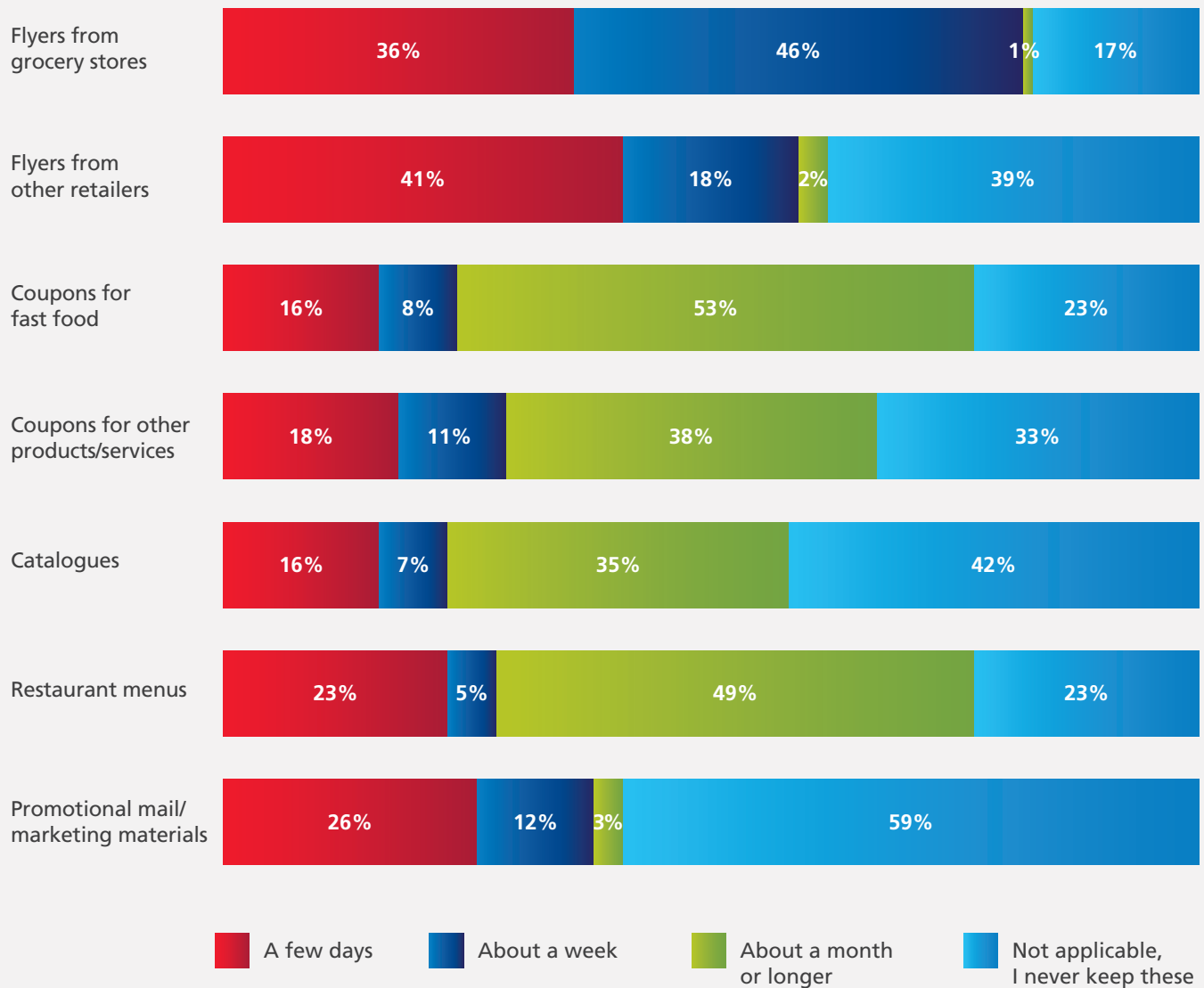
of mail is shared in a household<sup>35</sup>

**35%**

of promotional mail is passed along to others, in shared households<sup>36</sup>

# Consumers keep and display mail

How long are items kept in the home?



Question: Assuming you have kept these mail pieces because they are of interest to you or someone else in your household, how long do they tend to stay in your home before they are recycled or trashed?<sup>37</sup>

# Consumers save and display mail

› Magazines in the living room

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› Restaurant coupons on side of fridge

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› Restaurant menus in kitchen cupboard

**17 days**

Advertising mail is kept for 17 days, on average<sup>38</sup>

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**40%**

of those who receive catalogues typically keep them for at least a month (20% for at least four months)<sup>39</sup>

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**66%**

keep mail they consider useful<sup>40</sup>

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**39%**

have a dedicated display area in their home where they put mail<sup>41</sup>



## Finding #4: Direct mail persuades

Whether it's to drive a store visit or purchase, mail delivers a call-to-action that resonates.

Direct mail is noticeable, memorable and enjoyable. It stimulates an experience that is connected with emotion and intimacy. And its value is extended and multiplied when it is **kept**, **displayed** and **shared** with others. So, perhaps it comes as no surprise that it's far more likely to be actioned than digital advertising.

“Advertisements are meant to be seen and decided upon, which is what I do, and I enjoy making that decision every time I check the mail.”<sup>42</sup>

## Direct mail inspires

Direct mail is a go-to source of information and inspiration in the early stages of the purchase journey. Consumers use it to get ideas for both unintentional and planned purchases, and consider it a convenient way to compare products before making purchases both in-store and online. Overall, they consider mail the most useful channel for everything from special offers to new product launches and loyalty communications.

### Consumers are inspired by direct mail

**92%**

say they get ideas for household shopping trips from flyers<sup>43</sup>

➤ Consumers say catalogues are a convenient way to compare products before making purchases in-store (53%) and online (44%)<sup>44</sup>

**95%**

check grocery store flyers at least once a month compared to 57% for digital flyers<sup>45</sup>

➤ Around one in five use unaddressed mail for unintentional purchases, and one in three use it to help with planned purchases<sup>46</sup>

➤ One in four (25%) say print catalogues improve their online shopping experience<sup>47</sup>

## Direct mail drives traffic

Direct mail significantly outranks its digital counterparts across formats (flyers, coupons, catalogues) when it comes to driving traffic to retail stores – and as consumers start migrating more of their shopping online, it’s also proving an effective way for brands to drive traffic to their online properties.

### Direct mail drives traffic



**64%**

visited a website  
in reaction to  
direct mail<sup>48</sup>



**47%**

visited a store  
in reaction to  
direct mail<sup>49</sup>



**54%**

have engaged  
in social media  
as a result of  
receiving mail<sup>50</sup>



**33%**

of all print  
catalogues received  
in the past six  
months triggered a  
visit to a retail store<sup>51</sup>



**25%**

of all print catalogues  
received in the last six  
months triggered a  
website visit<sup>52</sup>



# Direct mail drives store traffic

When it comes to store traffic, print outperformed digital across almost all formats:

## > Flyers

**from grocers  
(45% vs 14%)  
and other retailers  
(39% vs 12%)**

## > Coupons

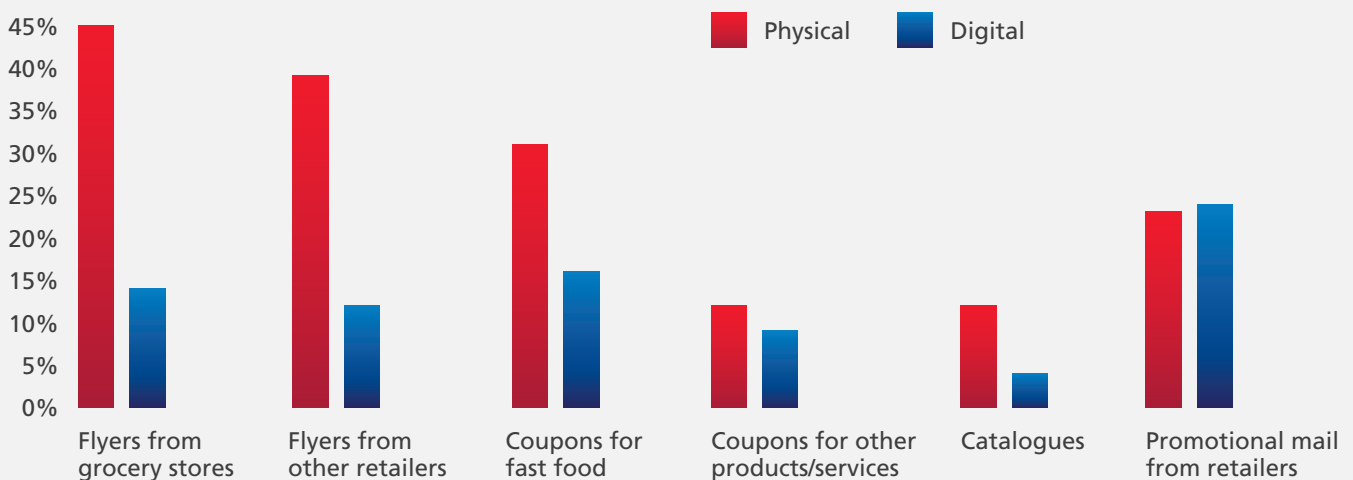
**from fast-food  
restaurants (31% vs 16%)  
and other products/  
services (12% vs 9%)**

## > Catalogues

**(14% vs 4%)<sup>53</sup>**

*The only exception was promotional mail from retailers, where digital (24%) outperformed physical (23%) by 1%.<sup>54</sup>*

# Store traffic: print vs digital advertising



Questions:<sup>55</sup>

- In the past year, have you visited a retail store in person as a result of advertising materials you have received in the mail?
- In the past year, have you visited a retail store in person as a result of online/digital advertising?

## Direct mail drives purchases

Direct mail prompts purchases – in-store, as brands have long known, and increasingly online. And its bottom-line benefits may extend “beyond the close” into customer loyalty metrics. For instance, research shows that customers who browse items in a catalogue are likely to spend more money with a retailer (regardless of whether the actual purchase takes place on- or offline).<sup>56</sup> And if somebody purchases an item online, they’re much more likely to be a loyal customer if the purchase was a result of seeing the item in a catalogue.<sup>57</sup>

### Direct mail drives purchases

**23%** in 23% of cases, direct mail prompts respondents to take action<sup>58</sup>

**33%** of all print catalogues received in the last six months triggered a purchase<sup>59</sup>

**50%** have purchased a product in-store over the past six months as a result of a direct mail ad<sup>60</sup>

**43%** ordered a product online in reaction to direct mail<sup>61</sup>

## Consistent results across audience groups

As mentioned in the [Methodology](#) section of this paper, Canada Post's ethnographic study included six audiences of interest – three representing different mail delivery types, and three representing different age groups. They found that mail management behaviour is remarkably consistent across segments.

When it comes to delivery type, there were modest variations in the frequency of mail collection (daily or every few days for community mailbox delivery, compared to daily or every second day for apartment/condo and door-to-door delivery) and the length of time to pick up the mail (up to five minutes for community mailbox delivery, compared to less than three minutes for apartment/condo delivery and less than one minute for door-to-door delivery). However, across delivery types, mail is taken into the home post-collection, where its sorting and subsequent handling is virtually unaffected by the method in which it was delivered.

There were some variations in attitudes towards print advertising across the age groups tested. However, as Guha explains, responses to direct mail were notably consistent. "We assumed the youngest group, the Millennials, would be quite averse to print advertising. And while they did express concerns about the environment, when we looked at their behaviour, they were as likely as the Boomers to take consequent action based on physical mail."



[Methodology](#)

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## Direct mail drives in-store purchases

Print outperformed digital across almost all formats for driving in-store purchases:

➤ **Flyers**  
from grocers (61% vs. 23%) and other retailers (31% vs. 12%)

➤ **Fast-food coupons**  
(30% vs. 8%)

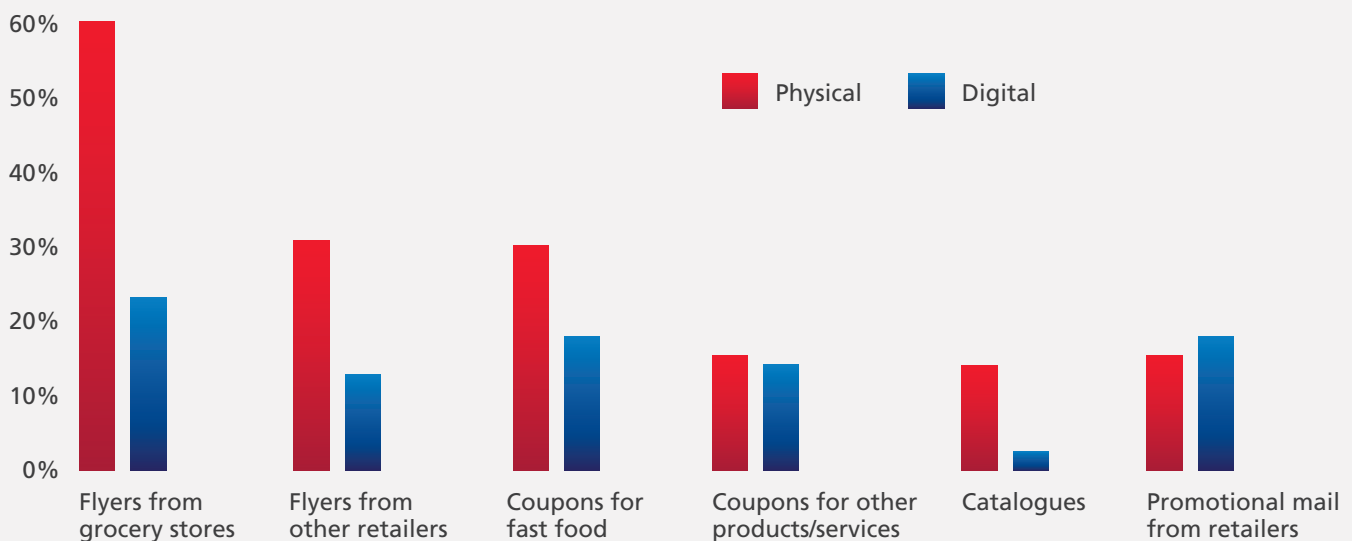
➤ **Catalogues**  
(16% vs. 3%)<sup>62</sup>

*The only exception was promotional mail from retailers, where digital (18%) outperformed physical (16%) by 2%.<sup>63</sup>*

## Implications for brands

Action – whether it’s a store visit or final purchase – is an effect of a decision that can be made immediately and impulsively, or over time after extended consideration. Direct mail is well-positioned to drive both. It has long been known for its ability to combine the influences of physicality and data-driven relevance to inspire a time-sensitive response. And, where higher-consideration offers are involved, its physical format serves as a visible reminder through the purchase journey until the consumer is ready to make a decision.

### In-store purchases: print vs. digital advertising



Questions:<sup>64</sup>

- In the past year, have you made a purchase in-store as a result of advertising materials you have received in the mail?
- In the past year, have you made a purchase in-store as a result of online/digital advertising?



# CONCLUSION

In a world of pervasive but ephemeral digital interactions, direct mail combines the intimacy of ritual, the impact of physicality and the power of data-driven relevance to send a signal that resonates:

- It's entrenched in a ritual that makes consumers more **susceptible to inspiration** from brands they wouldn't normally respond to
- It's noticeable and memorable, helping brands **capture consumer attention** and **stay top-of-mind** through the purchase journey
- It imbues messages with emotion and intimacy, suggesting it's an effective vehicle for **transmitting brand values** and a conduit for deeper and **more-genuine one-to-one customer relationships**
- Its value is extended, and sometimes even multiplied, when it is kept, displayed and shared with others. This enables **repeated brand exposure** throughout the purchase journey and serves as a **visible reminder** until a consumer is ready to buy
- Last, but not least, it is a powerful **trigger for action** and may even **enhance customer value and loyalty**

In the fierce competition for share of consumers' increasingly compressed attention spans, adding direct mail to the customer communication mix can indeed mean the difference between contributing to the noise and breaking through it.

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