

HOW MAIL INFLUENCES VOTING BEHAVIOUR

The impact of media channels
On the general election 2017



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EXECUTIVE SUMMARY

Royal Mail MarketReach was founded in 2012. We're dedicated to supporting mail and door drop channels in an increasingly digital world, where it can be harder to justify the spend on these traditional media when email and social media are often the go-to channels.

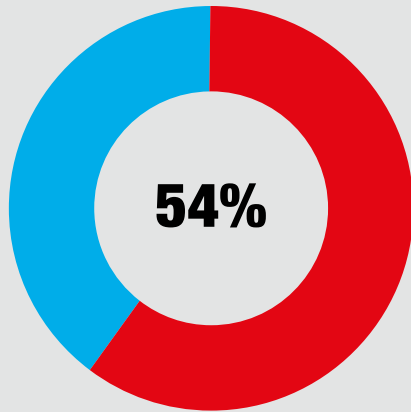
We undertake full and robust research into the impact of direct channels, helping support the mail industry and giving you the insight into the effects of mail on consumers – in this case voters.

We know that your spend during an election is important. Budgets are tight and you need the right tools to make sure your message hits home with the electorate.

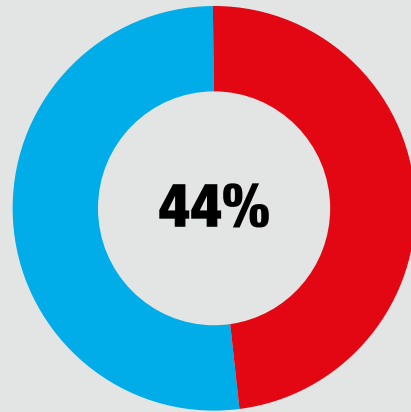
We were also aware that no research had ever been conducted on the impact of different media channels on voting behaviour. So we set out to understand this during the General Election of June 2017.

Royal Mail MarketReach worked with Illuminas, a leading qualitative and quantitative research agency, to help us understand the attitudes of voters towards the different communication channels they were exposed to during the election period.

Overall voters are influenced very much by the messages they consume during the election period



The communications I engaged with influenced my opinion towards political parties



The communications I engaged with influenced my opinion towards political parties

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017

54% of voters said that they had been influenced by what they'd seen during the campaign, and that had helped shape their political outlook. They also said that this had affected their voting intention.

Those who were undecided, which according to our sample data was 48% of the electorate during the early stages of the campaign, were more receptive to the communications they received. This suggests they were hungry for information - more than those voters who had already made up their minds.

Our findings showed that one in four voters only decided on which way they would vote in the week before the election or on the actual day. So communications needed to be consistently delivered across the election period if the parties' messages were to influence up until polling day.

The channels that have the highest recall might be surprising. TV is the highest at 76%, followed by door drop at 55% and mail at 52%.

With social media and other digital forms of communication it's less clear who the message is from. But with door drop, 86% of people are clear who the message is from, followed by mail at 84%. The next closest channel is TV at just 40%. Mail and door drop are able to deliver a local message, which provides clarity around who put the message out.

If you want to boost voter comprehension of your party's vision or policies, mail and door drop are more likely to be read in full than any other media - 69% for door drop and 68% for mail, ahead of social media at 67%.

This is amplified amongst those groups who have opposing views to the party sending the message. So if you want to sway voters, mail will at least be read and consumed by voters, even if they disagree with its message.

Mail and door drop are also more likely to be saved for future reference above any other media channel. Up to 30% of mail and 29% of door drops are kept so they can be looked at again.

Door drop has a significant influence on undecided voters, with 69% saying that this channel influenced their view on either an issue or the sender.

Printed material has a significant role to play in influencing voters during an election period where there is a short space of time to capture hearts and minds.

Get the bigger picture

Read on to find out more about how mail and door drop can influence voting behaviour.

If you need any help or advice, MarketReach is here to help with insights, creative and planning tools so you can maximise the performance of your mail.

HOW WE STRUCTURED THE RESEARCH

Royal Mail MarketReach selected Illuminas, a leading UK qualitative and quantitative research agency, to conduct a research programme designed to understand how all the channels impact voters over an election period.

Our methodology was to establish the nuances between voting intention and behaviour during the first and third weeks of the election. We also followed up with voters in the week after the election.

The research was conducted over three waves through an online qualitative questionnaire:

- **Wave 1** - the week starting the day the election was called, 18-25 May
- **Wave 2** - the week in the run-up to election day, 2-8 June
- **Wave 3** - following up with voters in the days after the actual poll

In wave 3 we undertook in-depth interviews of voters across the country for further insight into the materials they received throughout the entire election. It was important that we took in a range of constituencies with different challenges in each seat. It also had to be nationally representative.

We wanted to ensure that the seats selected would potentially use different communications approaches in those areas.

The seats selected were:

- Croydon Central, a marginal Conservative seat
- Bury North, a marginal Conservative seat
- Leeds North West, a Liberal Democrat seat, that was being defended
- Leeds Central, a safe Labour seat



We recruited a range of voters who were going to engage in the political process. First, we applied some important screening criteria:

- People had to be registered to vote or planning to register
- They had to be actively planning to participate in voting
- They needed to be open to hearing and discussing political views

And finally we excluded any individuals who were themselves politically active and engaged in the communication of election messages to the electorate.

Of those who qualified, over three quarters had voted in the 2015 election, almost one in five were first-time voters, 31% had made up their mind who they would vote for, and nearly half were undecided.

The total sample size that passed the screening phase was 1,685.

This was representative of the national population.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
			MAY 18	19	20	21
22	23	24	25	26	27	28
29	30	31	JUNE 1	2	3	4
5	6	7	ELECTION DAY 8	9	10	11
12	13	14	15			



The calendar shows the dates on which the 1,685 participants were asked to complete the online surveys. Wave 1 began three weeks before election day, lasting eight days.

Perhaps unsurprisingly, those who dropped out didn't vote in 2015 either.

There was a one week period between the end of wave 1 and the start of wave 2, which began a week prior to election day. Some participants chose to opt out of the research at this point, as well as some being filtered out as they had decided they weren't going to vote or were not registered to do so.

Wave 3 was the week immediately following the election to gather a more reflective view.

The final sample size going into this wave was 1,044.

Our research mirrored the outcome of the General Election

It was reassuring to see that our results closely reflected the actual outcome of the General Election, which meant we had made the right constituency and audience selections for our survey.

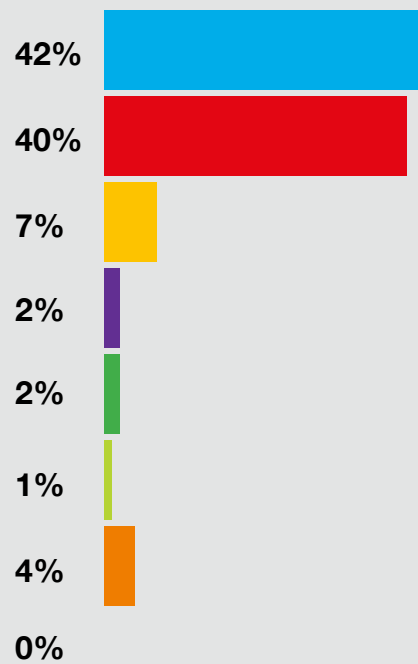
What happened on the day

Conservatives had 42.45% of the vote, Labour 39.99% and Liberal Democrats 7.37%. The chart below shows that our sample was very similar in terms of their voting behaviour to those who voted on the day.

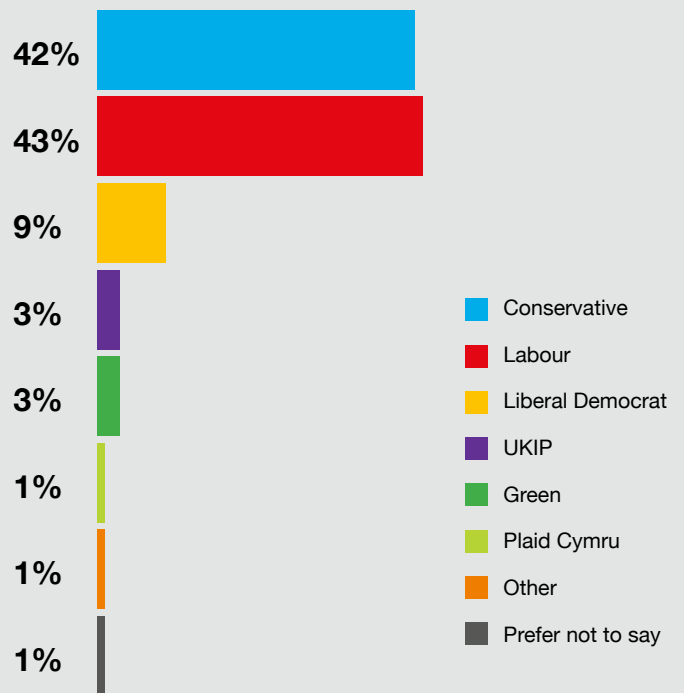
Interestingly, within our sample, 77% of people voted for the party they thought they would vote for at the outset of the election. During wave 1 of our survey, a significant 16% of people changed their mind as to who they would vote for, the remaining 7% were undecided from the start.

Which party did you vote for?

Actual result



Our survey



Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All Wave 1 who went on to complete the survey and cast a vote (921), All Wave 3 inc Wave 2 postal voters (921), all voters (32.18m)

INFLUENCING THE VOTER

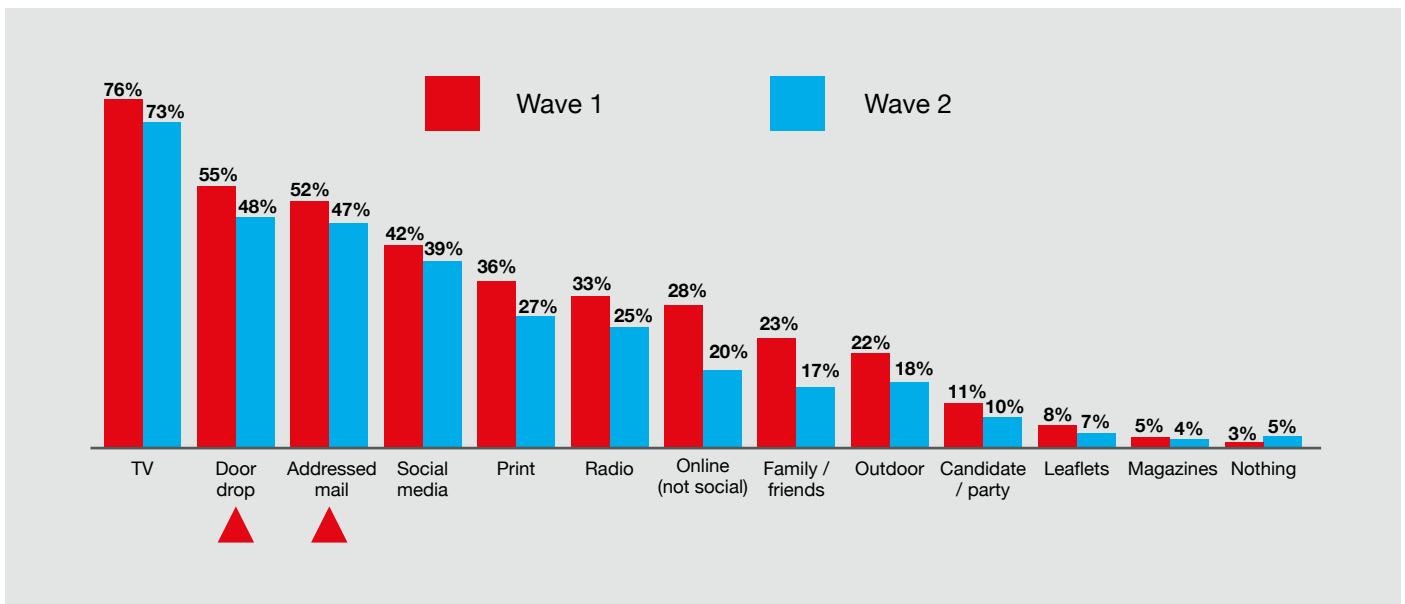
Our questionnaire revealed that 54% of people said that their general political outlook was influenced by the electoral communications they consumed during that time.

And 44% said that the communications they were exposed to influenced which party they voted for.

So, the range of communications that voters were exposed to during the election had an impact. But we wanted to understand the relative strength of all those channels in the minds of voters.

Awareness of communications channels

The recall of the various channels is shown below, across the two waves in the run-up to the election. The red bar shows the first week of the election and the blue bar shows the week in the run-up to voting.



TV has the highest recall of all the channels. In the week before the election it appears that people are generally more engaged in the first two weeks of the election, indicating that interest waned slightly in the week before voting. Largely speaking, however, engagement rates with all channels were consistent across the two periods.

Door drop and addressed mail followed TV in terms of recall, ahead of social media, print, radio and online.

Again, the recall of all channels seems to wane slightly over the election period, suggesting that people are more keen on hearing these messages during the earlier part of the election. It may also reflect the way people make their decisions regarding who they'll vote for over that period of time.

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All Wave 1, All Wave 2

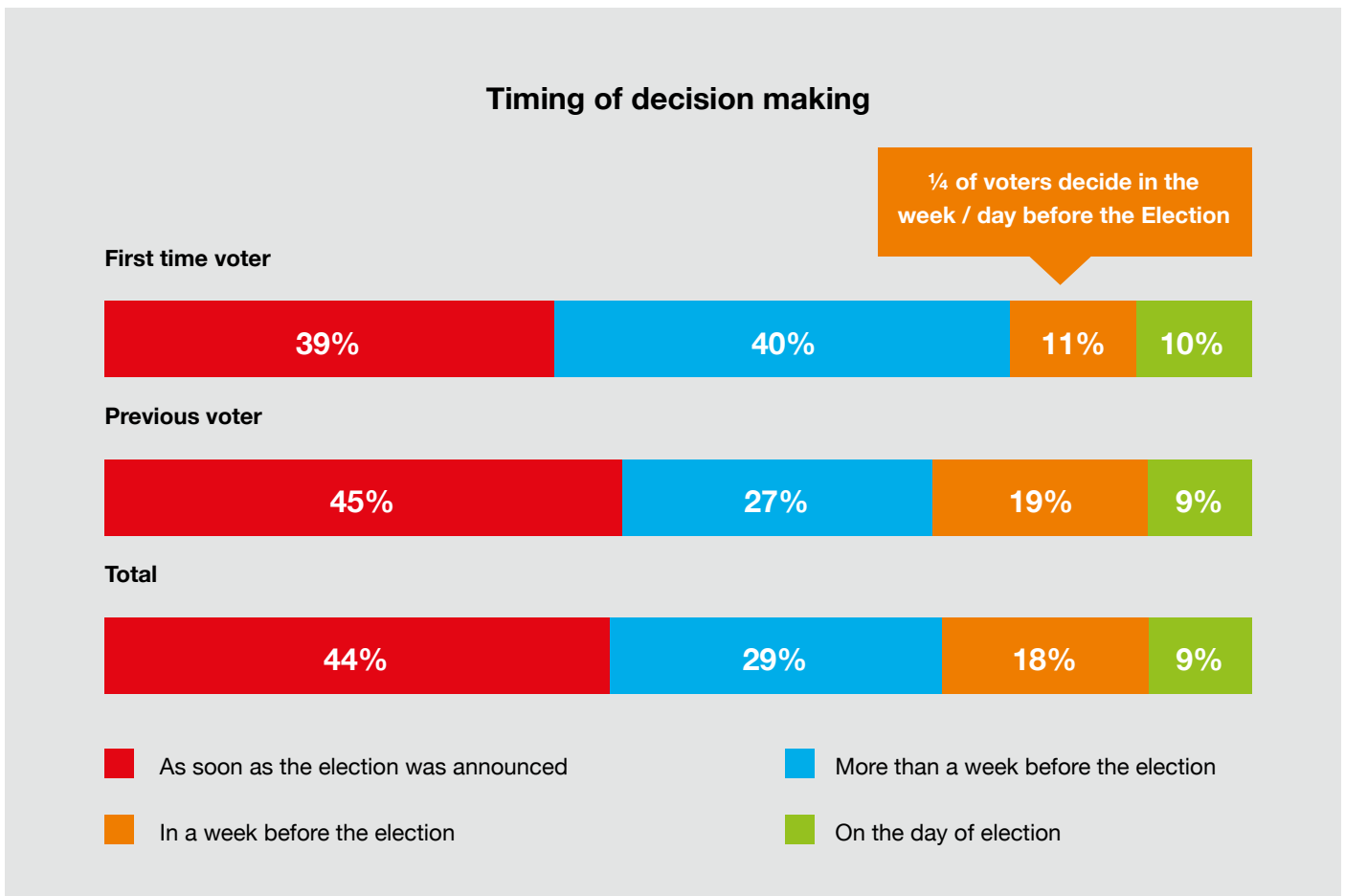
Communicating throughout the process

We then investigated at what point people decided who they would vote for. A significant number are making up their minds right at the start of the election, with this number being lower for first-time voters.

Another large proportion of voters make up their mind two weeks before the election, with that number decreasing in the week before, and then even further on the day itself.

Overall, 50% of voters are still making up their minds more than a week before the election.

This shows how important it is to keep communicating your messages to the right people throughout the election.



Interestingly, while fewer first-time voters know how they will vote the moment the election is called, they are more likely to have made their decision more than a week before the election, rather than leave it to the last few days. This suggests they are most hungry for information in that first week to help them weigh up their options.

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: Wave 3 (All)

HOW MAIL AND PRINT ARE PERCEIVED

Mail is recognised as being partisan but is welcomed for its ability to deliver detailed information, and for giving voters the time to cut through the sound bites.

They also recognise that few mediums are not biased, so many people overcome this by consuming as much information as possible to help them reach an 'educated' decision. They also consult with friends and family to hear their opinions.

Voters would really like the parties to present information in a non-partisan way.

They want communications that accurately and truthfully inform them about policies, helping them make an informed choice on who to vote for.

Ultimately they recognise this is probably unrealistic, and across all channels there is a perceived bias of one form or another.

They also don't want to get overwhelmed by too much information, so they tend to filter and hone in on what they see as the key issues.

What they're looking for

- The reassurance and confidence that the decision they're making on how to vote is a good one
- That they have made a reasonable effort to understand the issues and have considered things fully

So, even though 44% of voters have made up their minds early on in the election process, they still seek the reassurance that they've made the right decision. Mail and door drop play a major role in confirming this to them.

Print is preferred to screen

When speaking to voters during in-depth interviews we found that printed material plays a different role to that of looking at political information on screen.

The tactile nature of print allows people to have some quiet time by themselves to consider things

at their own pace, allowing them to engage at a more emotional level. They are less intimidated and it gives them a greater sense of ownership of the content.

Print gives time for consideration

Printed communications allow voters to fully read and digest information without any distractions. 73% of people agree that print makes it easier to see past sound bites and slogans if they have time to read it on their own. It also gives them something physical that they can go back to whenever they like.

47% said that even if they don't agree with it, being sent mail from politicians makes them feel more involved with the political process.

58% said that mail is a good way to make sure that opposing viewpoints get through to people who might ignore or block them in other media. With other more passive media channels, voters are able to ignore or at least filter out messages they don't agree with.

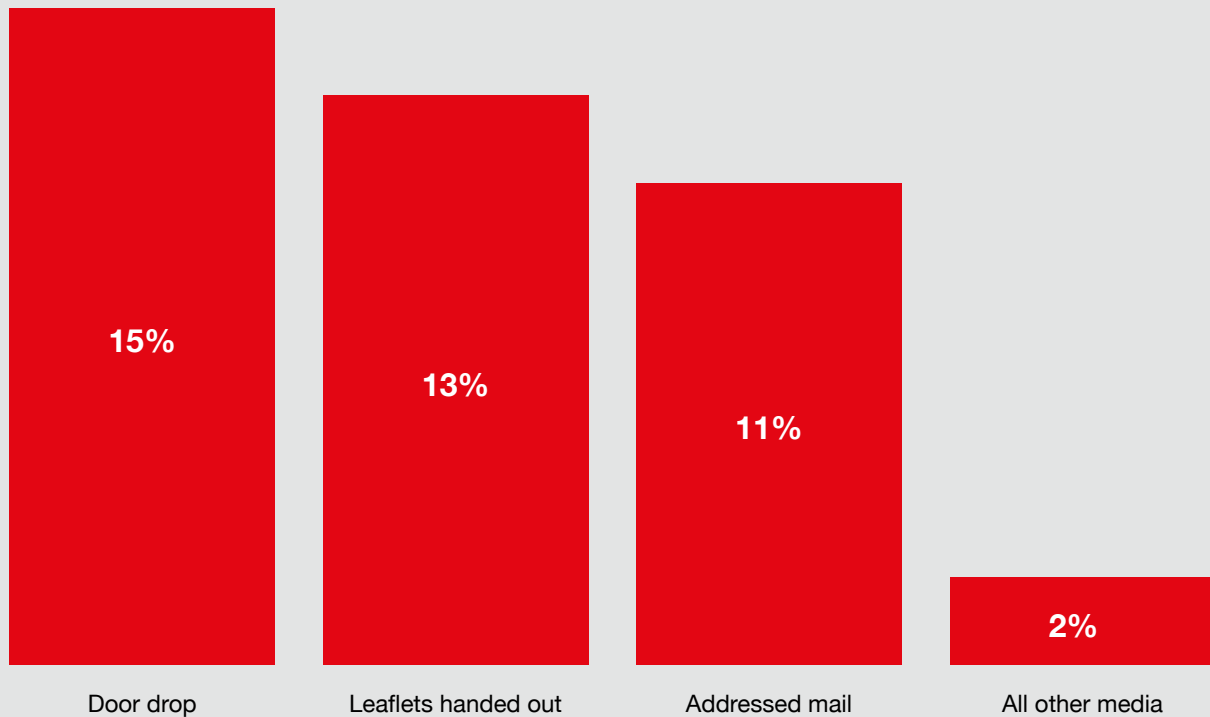
In addition, **56%** of people said they were more likely to read about viewpoints they don't agree with if they see them in print rather than online.

69% of voters felt it was easier to make sense of conflicting arguments if they could read them on paper.

To summarise, mail allows people to fully digest a party's entire message, even if it is an opposing view. It also lets voters compare that message with other printed communications they have received, something other channels can't offer.

Mail and door drops are local

To the best of your knowledge, which issues you saw, read or heard were about: local information



As mail and door drop are seen as local communications, they are not confused with national messages and are valued for their focus on local issues.

Recipients say that mail is an effective way of spreading the local message and makes them feel valued when it lands on the doormat. They value the fact that mail contains information about how their local area will be affected, and provides a sense of belonging and a link to the local community, which national communications can't do.

And as it is really about the local candidate, they view it differently from national-centric content consumed on other channels, often fronted by the party leaders.

For some, this local content was important in reaffirming their voting decision in the run-up to the election.

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017 . Base: Wave 3 (All)

THE ROLE OF MAIL IN ENGAGING VOTERS

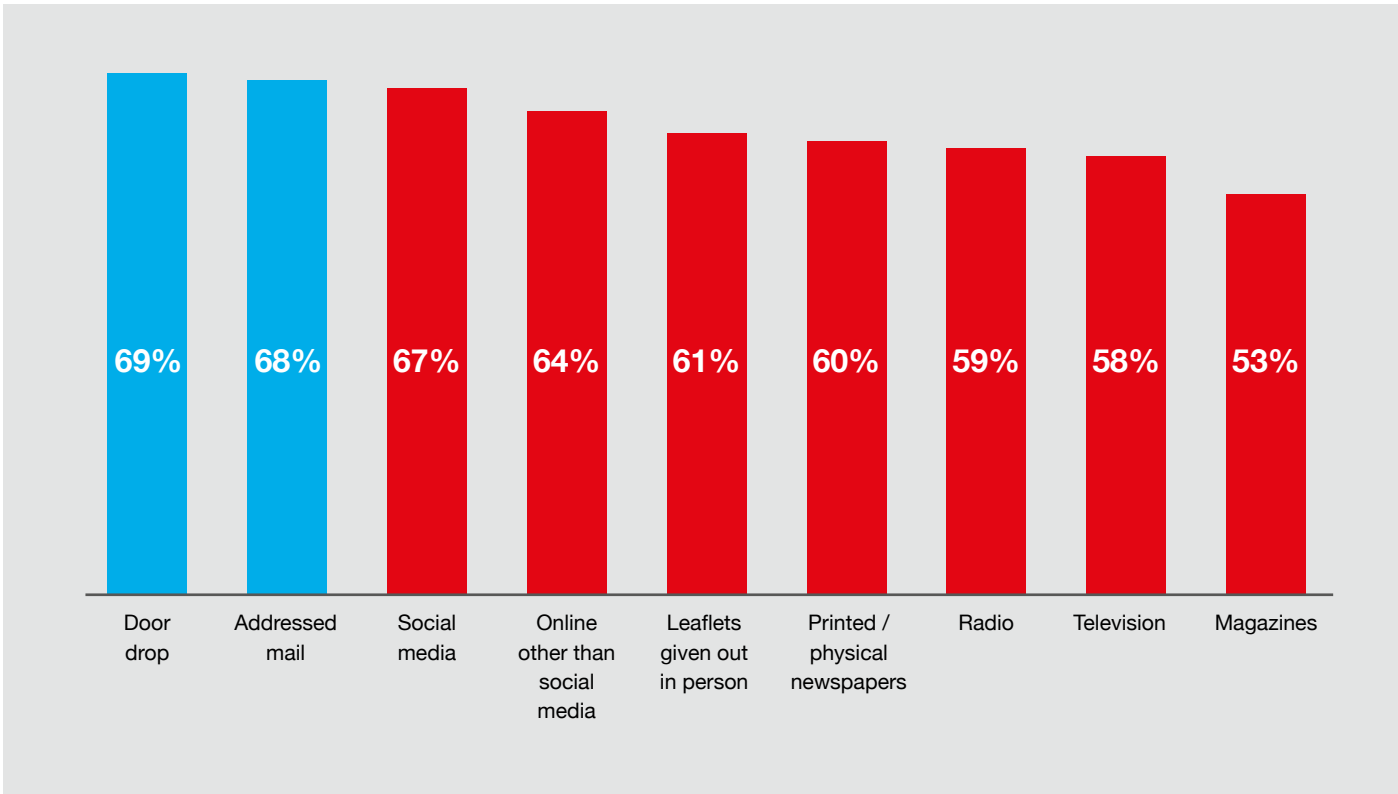
We also wanted to understand how voters engage with the mail they receive. What are engagement levels like across all the channels? How long might an election leaflet stay in the home? And how often might it be looked at?

Which communications are read or listened to in full?

The chart below shows that mail and door drop are very good at gaining the full attention of voters.

69% of respondents said that they are most likely to read a door drop in full, followed by mail at 68%.

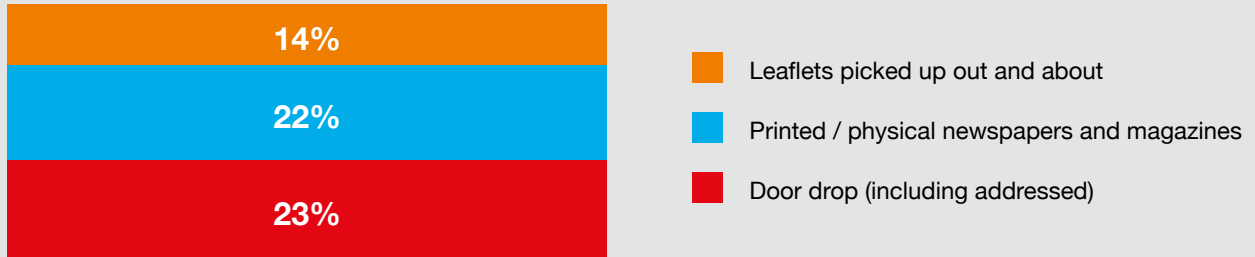
Social media is the next nearest channel, then online. And while TV is one of the most recalled channels, it fares less well in terms of commanding undivided attention.



Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All comms read on receipt, by media, (Wave 1; Wave 2)

Print gives time to reflect on content

It gives me time and space to reflect on what's being said



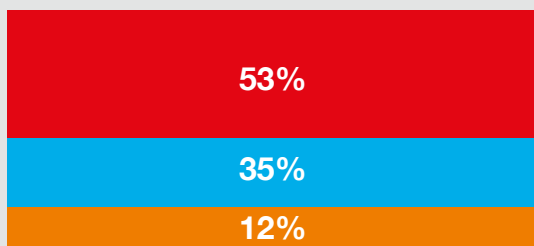
How much do people engage with print?

The chart below shows that print has the ability to bring people in, regardless of whether they agree with the views of the sender or not.

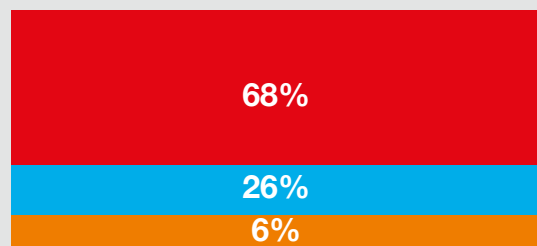
Even if they don't agree with the views presented, 53% are still likely to read it and 35% will read or look at some of it.

If the voter agrees with those views, 68% of them are likely to read it in full and 26% will read or look at some of it.

The extent to which all communications were read or consumed



Communication somewhat / strongly reflected views



Communication somewhat / strongly different from views

■ Read / watched in full
 ■ Read / watched some of it
 ■ Skim read / vaguely watched

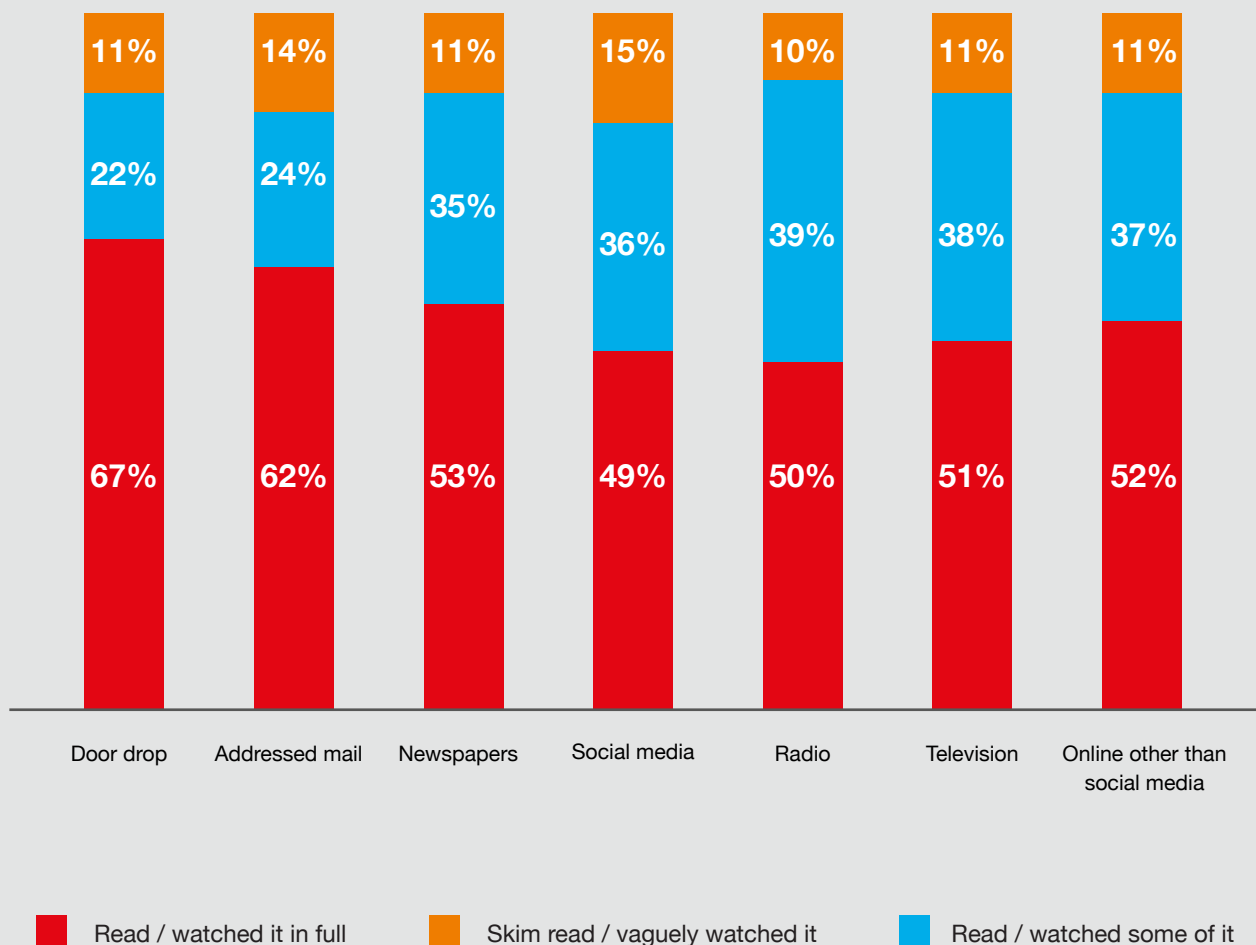
Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All comms read on receipt, by media, (Wave 1; Wave 2)

Comparing print to other channels

Door drop and mail have the power to drive this level of engagement among voters who don't necessarily agree with the content they're reading more than other channels.

67% read unaddressed mail in full and 62% read addressed mail in full, compared with the next closest channel, newspapers, at 53%.

Extent to which communication has been read / consumed which somewhat / strongly differed from my views

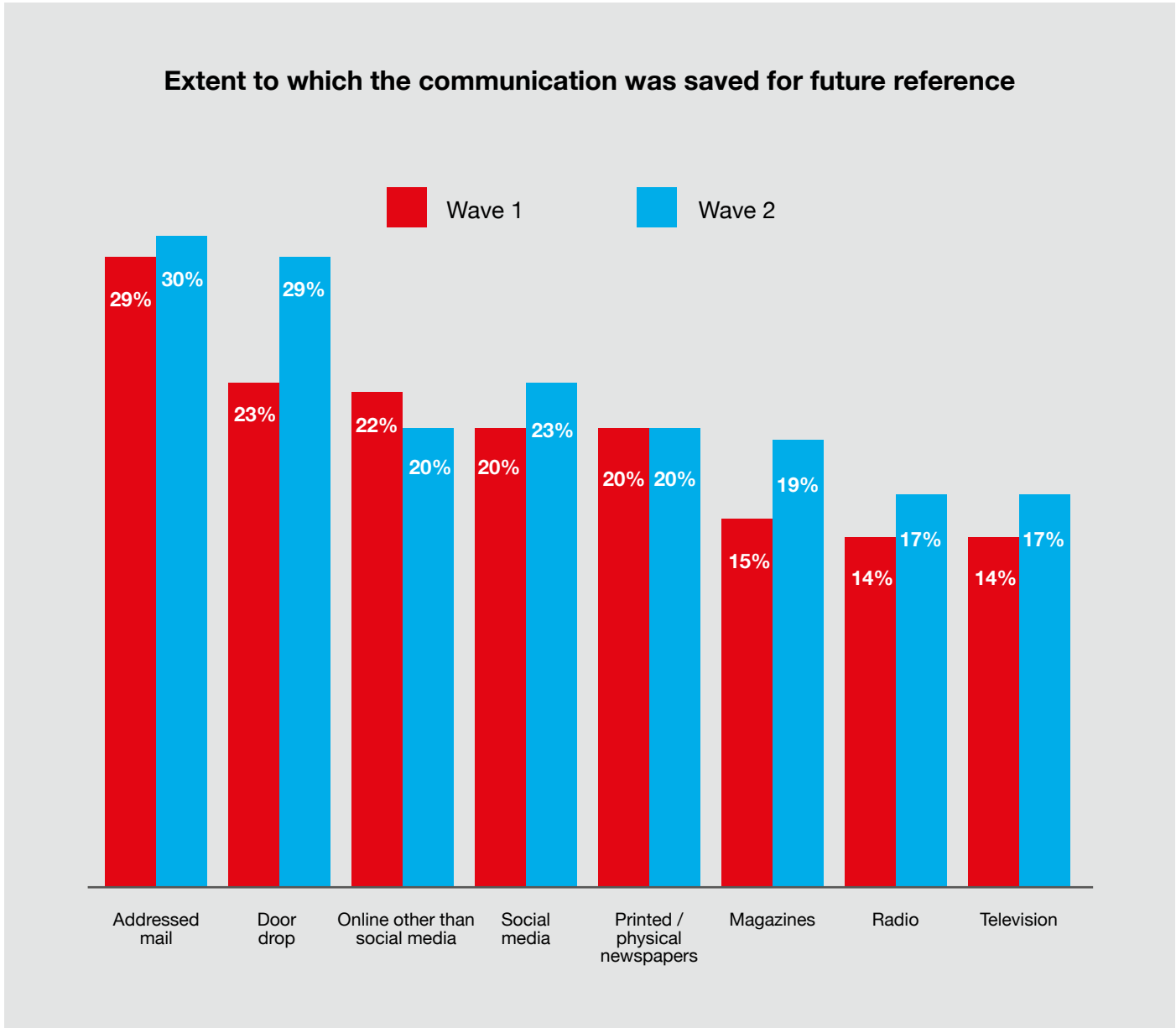


And when we delved deeper into the data, it suggested that this impact would be most felt in marginal constituencies where there was more importance placed on gaining voters who might not agree with a party's policies.

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All answers on communications which somewhat / strongly differed from views by media (excluding leaflets & magazines)

How communications are revisited

Again, mail and door drop command the highest percentages of those saying they will keep the material to come back to another time.



This also stimulates conversation and debate in the home, with two in three people saying that they had spoken to someone else about the mail or door drop they had received.

During waves 1 and 2, addressed mail is most likely to be saved for future reference.

Wave 2 is higher than wave 1, potentially a result of the messaging in wave 1 being tailored by parties to address the known position of the voter being targeted.

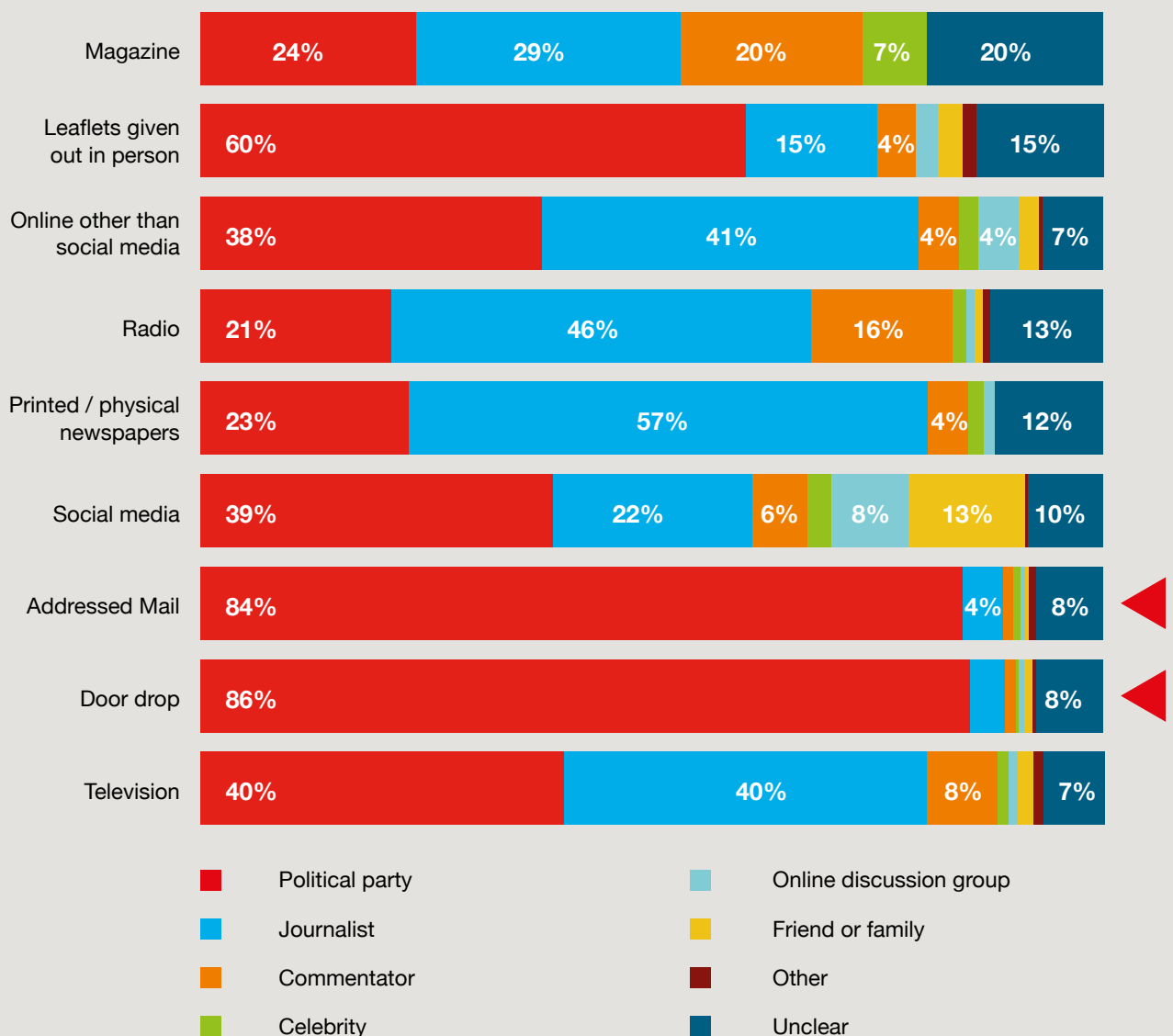
Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All answers by media (Wave 1 & 2)

People understand who mail and door drop come from

There is very little ambiguity in mail and door drop as to who is promoting the message, but this is less obvious in most other channels.

On TV the message can obviously be coming from a politician in a debate (although not in this instance), but often there's a journalist or commentator involved too, giving their view on what's being said.

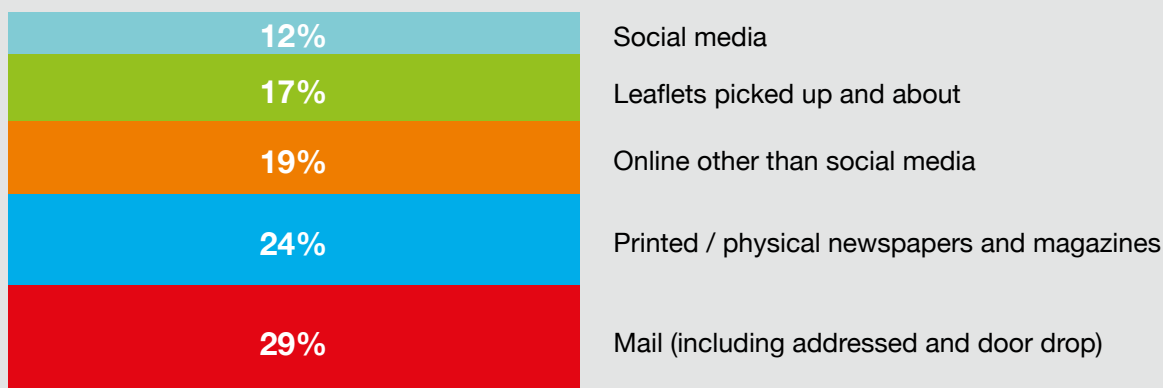
You can see from social media that this can be seen to come from a variety of sources: the party, a journalist or commentator, and also family and friends.



Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All answers by media (Wave 2)

Because it's clear with mail who's sending the message, people interpret it as being the communication that best reflects "the sincerely held views of the sender". Mail scores 29% on this measure, compared with online media at 19% and social media at 12%. This supports the case that mail is more transparent and trusted than other media, resulting in its higher engagement rates.

Best communication type across interpretation lenses



It accurately represents the sincerely held views of the author / sender

Clear branding helps get the message across

The branding on a piece of mail or door drop also plays a role in helping voters pick out the messages they will engage with. This is driven by four main elements:

- **Colour** - using colour coding can significantly aid comprehension. Your party's brand colour helps with recognition and identifying who the message is from
- **Message** - voters expect the messaging in communications they read to have a bias, but they're able to pick through the headlines and make sense of the content
- **Format** - generally the traditional formats let people know exactly what to expect and how to interpret or filter what's inside. Leaflets and broadsheet formats are two good examples
- **Authenticity** - the clear branding shows an 'honesty' that isn't always there in other media – especially traditional ones – which are supposed to be agnostic but appear not to be

The overt branding means consumers see mail and door drop as authentic sources of information, whereas with other channels it's not so clear-cut.

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: All answers by media (Wave 2)

The voice of the voter

“I like the flag, it’s the British Standard. It’s the local MP and he’s actually met the leader, which is good. It talks about the local issues, it’s actually a lie what they say here though.”

Fummi, Older Family
Croydon Central

“Just looking at the way he (James Firth) has presented this leaflet I believed in him and thought he is the one, definitely.”

Anissa, Fledgling
Bury North

“I think I read this and I remember it prompted me to look inside, they give facts and figures. It appeals as not too lengthy or detailed.”

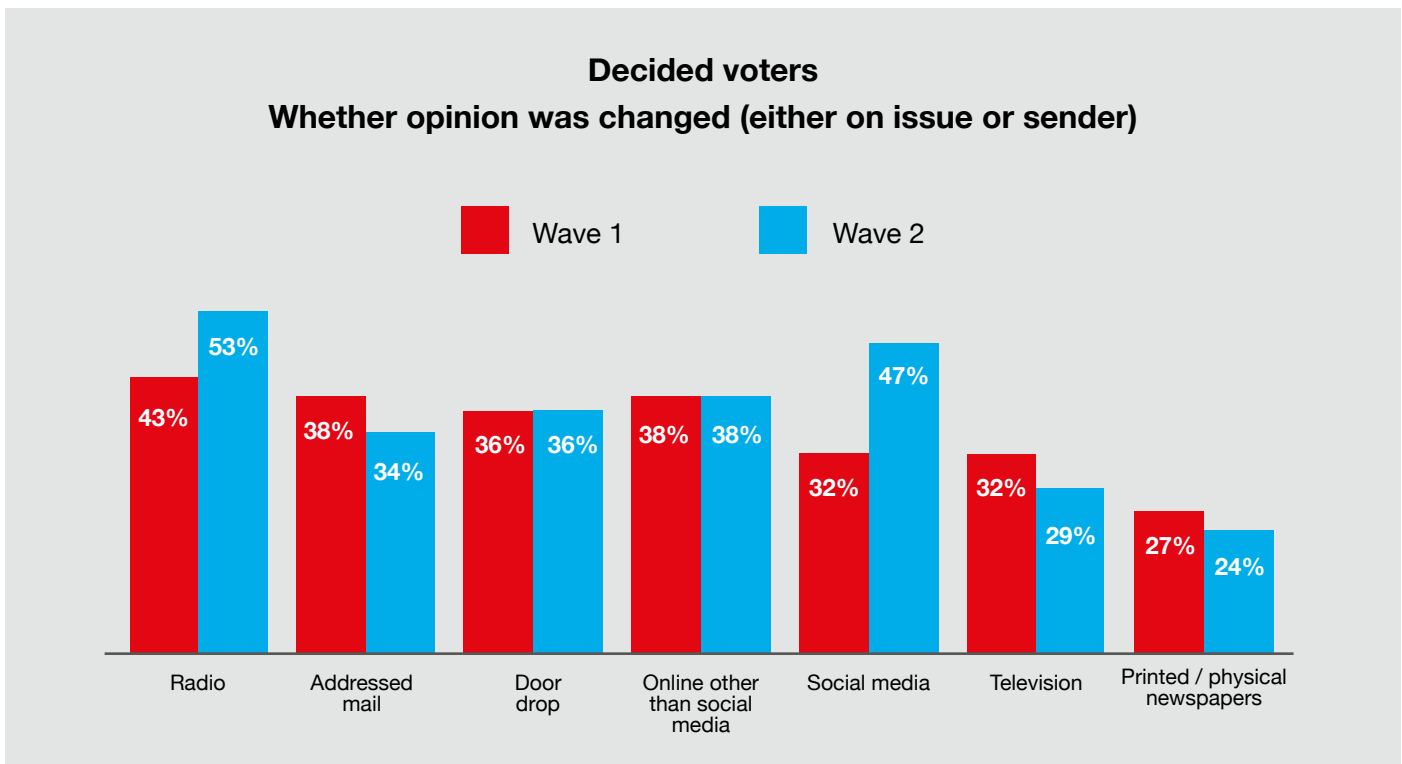
Paul, Young Family
Bury North

THE IMPACT ON PEOPLE'S VOTING INTENTIONS

The final piece of analysis was to understand to what extent voters' opinions had been changed over the election period and by which channels.

We looked at broad groups of voters – those who had decided at the start of the election, those who were undecided at the start but firmed up their views as the election progressed, and first-time voters.

Voters are influenced by different channels throughout the election



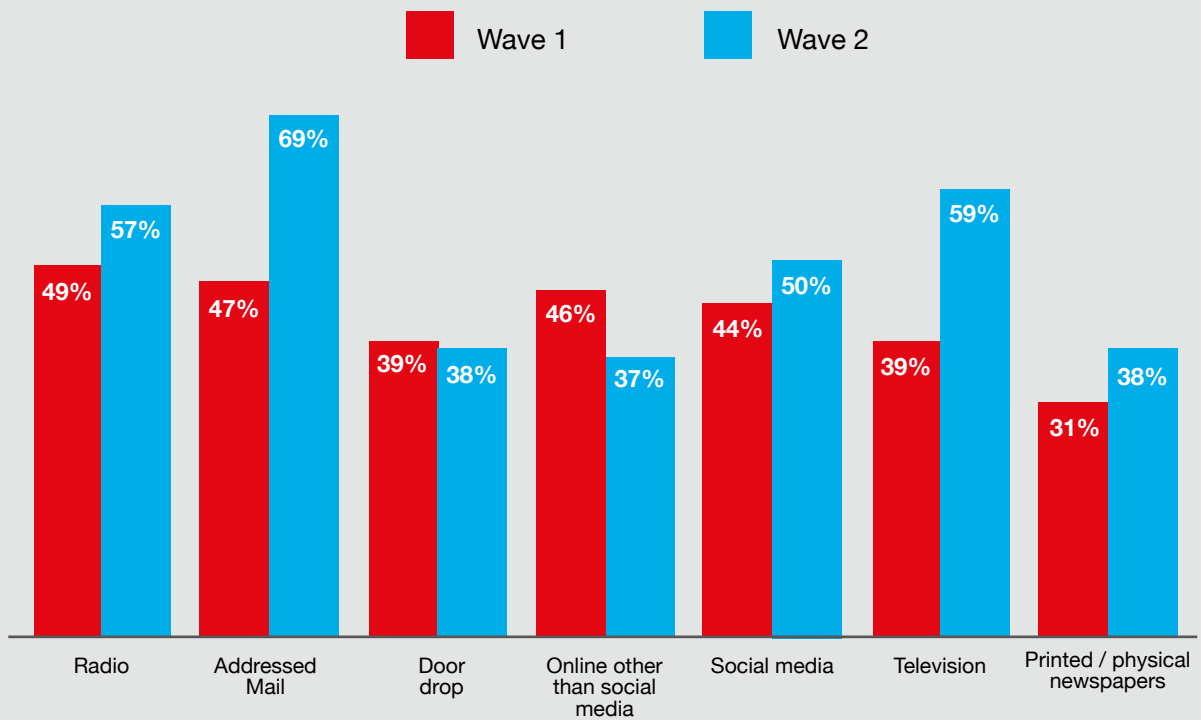
In the early stages of the voting process, those who had originally decided which party they would vote for when the election was announced were influenced across multiple channels.

Radio came out as the most effective channel for changing opinion either on an issue or on the party.

This rose to 53% in the week before the election and also increased for social media, where most other channels were fairly consistent across the two waves. Mail, door drop and online media all delivered at a similar rate, ranging from 34% to 38%.

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: Decided voters Those that said comms had an influence / impact...unaddressed mail, addressed mail, wave1, wave 2

Undecided voters Whether opinion was changed (either on issue or sender)



With undecided voters radio does well again in terms of changing people's views. But addressed mail in the week before the election comes out highest, followed by TV and radio.

So, undecided voters are perhaps looking for more information to help them make their minds up, whereas decided voters look like they're seeking confirmation of the decision they've already made.

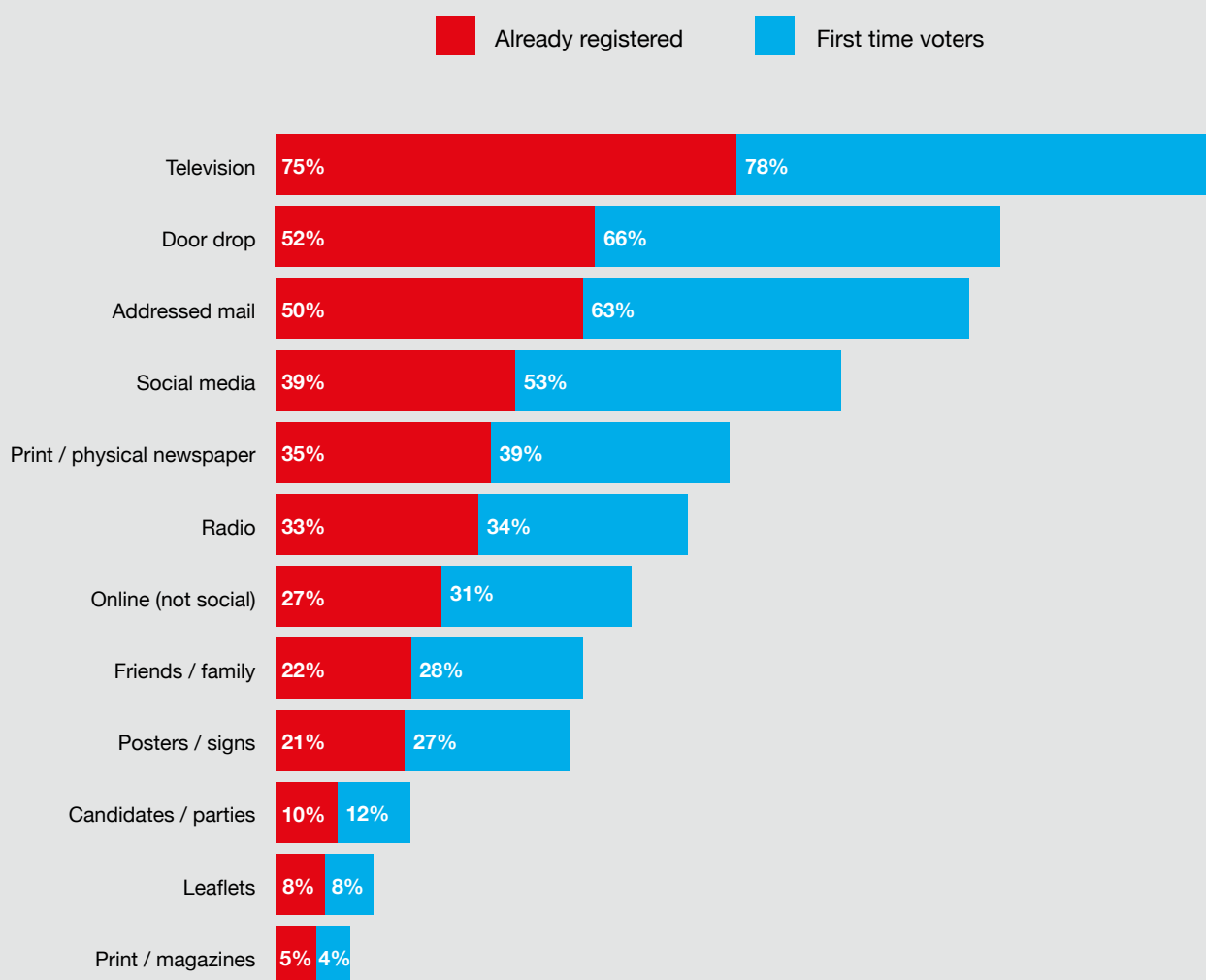


Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: Undecided voters Those that said comms had an influence / impact...unaddressed mail, addressed mail, wave1, wave 2

First-time voters

Almost 90% of first-time voters didn't know who they would vote for when the election was called. With this much uncertainty, it's important to send communications to them as early as possible so they have information to base their decision on.

Where voters have seen communications to help them consider political issues (over last few weeks)



You might expect these voters to be more digitally engaged than their more experienced counterparts. But like older voters they still look to TV, door drop and mail – only then followed by social media.

Source: Communications in Electoral Engagement, Royal Mail MarketReach, Illuminas 2017. Base: Wave 1 already registered voters, first time voters

CONCLUSION

54% of people said that their general political outlook was influenced by the electoral communications they received.

44% said the communications influenced which party they would vote for.

- Of the many forms of communication used throughout the General Election campaign, mail and door drop proved very strong at influencing voters' opinions and perceptions
- Mail is one of the most memorable forms of communication for all voters, having the highest recall behind TV. This is important during a decision-making process as those messages will resonate more than others
- Mail is also the most read form of communication, regardless of whether it contains views shared by the voter or not
- Due to its tangibility, mail is easy to save compared to other types of media and is often reviewed at a later date. This also means it's shared and discussed with others
- Voters are influenced across multiple channels but undecided voters are particularly influenced by door drop, especially in the week leading up to polling day
- First-time voters actively seek information to help inform their decision as they are very often undecided on which party to vote for in the early stages. They are more influenced by TV, mail, door drop and social media than those who have voted before

HOW MARKETREACH CAN HELP

Call on the power of MarketReach to boost your marketing effectiveness - we're a dedicated team of specialists with a unique set of skills, tools and free services to help you make great communications. Our data planners and media specialists are on hand to enhance your marketing strategy through mail. So your campaigns get the best results possible.

Data, strategy and media - our team work with brands to boost mail performance as part of the media mix.

Tools - we have access to insights, creative and planning tools, all of which help you generate the best outcomes for your campaign.

Insights - our ongoing research seeks to identify why mail delivers more powerful one-to-one relationships. What is it that makes this a pivotal moment in the voter journey, and how can marketers benefit?





As the UK's leading expert on the power of mail, we help organisations to achieve their goals by unleashing the magic of mail.

Whether you need broad market insight or have a question about making mail work for your organisation, we've got it covered. And our advice is always available for free.

For more information, visit marketreach.co.uk

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