**Engagement May – July 2015**

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| **Member Campaigns** |  |

Going forward Engagement reports will focus on activities aimed at initiating and encouraging members to engage with the scheme. Member and employer satisfaction will be covered in the Administration report, as this report deals with how members are interacting with the scheme.

Previously we reported healthy levels of interaction with the scheme by both active and retired members. Since the last report there has been a slight decline in this position, although the overall interaction levels remain positive and plans are in place to encourage a return to a position of growth moving forward.

In May the Annual Benefit Statement and P60 email campaigns were not distributed due to server capacity concerns. Although these issues were subsequently rectified, because of the delay and the loss of impact of this activity the campaign has been deferred until 2016.

Statistics for this quarter reflect the knock-on effect of reduced e-campaign activity. There are currently 352,851 members with a My Pension Online, of these 23,460 were set up in May – July which is a 32% fall on the previous period. There were 306,100 visitors to the web, which is a reduction of 34% on the previous period and a 19% fall on the same period in 2014 (377,087). Although 73,309 members updated their details online (an increase of 42% on the last period), 80,000 viewed their Annual Benefit Statement, which was a drop of 18%. The calculators tell a similar story with just under 800,000 page views compared to over 1million in the previous period, which is a fall of 20%.

However, the site is still converting well with an 8% increase on the number of registrations and 17% increase on Annual Benefit Statement views compared to the same period last year. Visitors to the site are also staying longer and visiting more pages, suggesting that the site is a good source of information to them. On a more optimistic note the activities piloted to encourage younger audiences to engage with their teachers’ pension via social media is starting to deliver positive results. In this period we have 165 more twitter followers tipping us over the 1000 mark. Analysis of web visitors shows an increase in twitter activity and it is hoped that this channel will become a stronger direct route moving forwards.

In order to ensure campaign activity is effective and supports the strategic objectives a number of activities are incorporated into the planning process. This includes categorising the population into segments using ‘lifestage metrics’ such as age group, marital status, number of years teaching and retirement interactions. This approach allows targeted and bespoke activity to be delivered. Other activities include ‘split testing’ whereby an email is sent to a small sample of the target audience but containing different subject lines - the subject line attaining the highest open rate is then used for the bulk send.

Campaign activity over this period focussed on two key areas : conversion activity and interaction levels. Campaign activity aimed at encouraging members to interact with, what is accepted as a dry subject, via their online account realised open rates ranging from 47% - 60%. Generic campaign activity to convert members to online accounts attained open rates of between 20% and 50% depending on the segment. Bespoke campaign activity discussing retirement options achieved open rates of 81% and click through rates of 39%, and a campaign encouraging members to re-join the scheme exceeded the 40% target, with an open rate of 51%.

Another way that TP measure and monitor the success levels of e-campaign activity is to benchmark open rates with similar industries. One of the most recognised measures of this is against ‘Mailchimp Email Marketing Benchmarking’. This is one of the largest global email distribution software providers and comparison with their results show that TPS activity is above financial/insurance/pension industry sector standards of 19.68%.

One of the actions arising from the June Board was for TP and the Department to help the Board better understand the context and comparison of data regarding email activity, specifically in respect of how TP benchmark. It is planned that this activity will be covered during a session explaining the engagement and marketing strategy that will be delivered as part of the site visit to TP in Darlington (December Board meeting).

Marketing exemption, the annual exercise whereby the Department secures Cabinet Office approval for it’s communication plans, is continuing to progress through the Department’s Communications Team.

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| **Employer Engagement and Campaigns** |  |

At a recent Local Government Association stakeholder event, discussions with employers about how they could support TP with member activity resulted in a specific employer campaign to provides tools and support materials that could be used to raise awareness of TP and the benefits of establishing an online account. Initial results are positive with good numbers of downloads and web visits by new visitors. TP plan to continue to build good working relations with employers to increase the reach of TP and encourage web visits.

Linked to this the ‘tell your teams’ campaign, provided employers with resources to help them advise employees of their status following Reform; this has delivered excellent results with 861 downloads, direct web visits reaching 6,872 (equating to 3,000 new users), over 250 logging in to My-Pension-Online and over 60 updating their details.

Other key activities in this period includes the implementation of developments to improve the employer experience. Enhancements to the member print functionality provide employers with more in-depth pension related member information in one place and access for payroll providers. Both developments were as a result of joint projects with key stakeholders and employers. The monthly distribution of the employer e-newsletter in this period had higher click thru’s than last period, suggesting that articles were of interest to all audiences which also helps to increase web visitors.

We previously reported concerns over the Academy audience due to their lack of engagement. Further analysis has identified that whilst academies may not be engaging with e-newsletters, interaction with other activities such as webinars and seminars is high. This information has reduced the level of concern with this audience, particularly as they generally submit data in a timely manner; however, because the expectation is that this sector will grow, the levels of interaction will be monitored.

The Employer Relationship Managers continue to deliver business as usual along with some residual Reform related activities. In addition the Prudential, DfE’s nominated Teachers’ Additional Voluntary Contribution provider, commenced delivery of member presentations to provide an overview for members of the scheme, with the aim of demystifying their pension and encouraging pro-active financial planning. No concerns have been raised by employers about the move to using the Prudential, and initial satisfaction results are around 80%. Regular liaison continues with Prudential to monitor future requirements.

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| **Seminars/Webinars** |  |

This period has seen the successful delivery of 44 seminars and 441 webinars, reaching 441 employers and 1033 delegates, predominantly focussing on Reform. Satisfaction levels achieved from the delegates are in the mid 80s%.

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| **Forward Look** |  |

The lengthy approval process for the Marketing Exemption has prompted us to explore further how to mitigate any future reduction in web visits caused by dips in campaign activity. By identifying key touch points which could be successfully used to encourage My Pension Online, conversions and interaction with the website could be increased. We plan to conduct and analyse more split subject line testing to ensure optimum conversions and achieve and increase in web visits as a direct result of campaign activity.

We will also be exploring fast-track My-Pension-Online activations via the contact centre, email contact and retirement applications. In addition social media activity will continue, with the intention of initiating campaigns swiftly following the approval of the marketing exemption.

Stakeholder management will be a key driver over the coming months, as educating and encouraging employers to support and promote the scheme and the use of My Pension Online is considered to be a key tool. To ensure we succeed in this we need to have a more in-depth understanding of each audience and the different dynamics, therefore a stakeholder management strategy will be considered and developed to provide more insight.