

# JICMAIL Quarterly Results

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Q2 2024

**JIC  
MAIL**

Mail Media Metrics

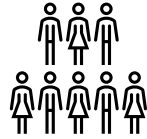


# Q2 2024 Highlights



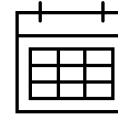
**+12%**

Increase in JICMAIL panel volumes year-on-year



**10%**

Of volume driven by political parties: more than quadrupling their mail activity year on year



**7.3 days**

Average mail lifespan: up across all mail types



**5%**

Of non-political mail drove a purchase: Up 8% year on year



**8%**

Of non-political mail prompted a website visit: Up 3% year on year



**80**

**seconds**

Spent with the average piece of political DM among 45-54 year olds



**76**

**seconds**

Spent with the average political Door Drop among the C1C2 social grade





## Panel Volumes

Panel volumes increased by 12% in Q2 2024 and are at their highest level in over two years. The General Election fuelled a quadrupling of political volumes, but growth was also seen in the travel and retail sectors.



## Engagement and Effectiveness

Mail engagement remained strong even as the panel had more volume to sort through: lifespan and attention increased across all mail types year on year.

Non-political mail recorded an 8% increase in purchase effectiveness and a 3% increase in website traffic.



## Political Mail

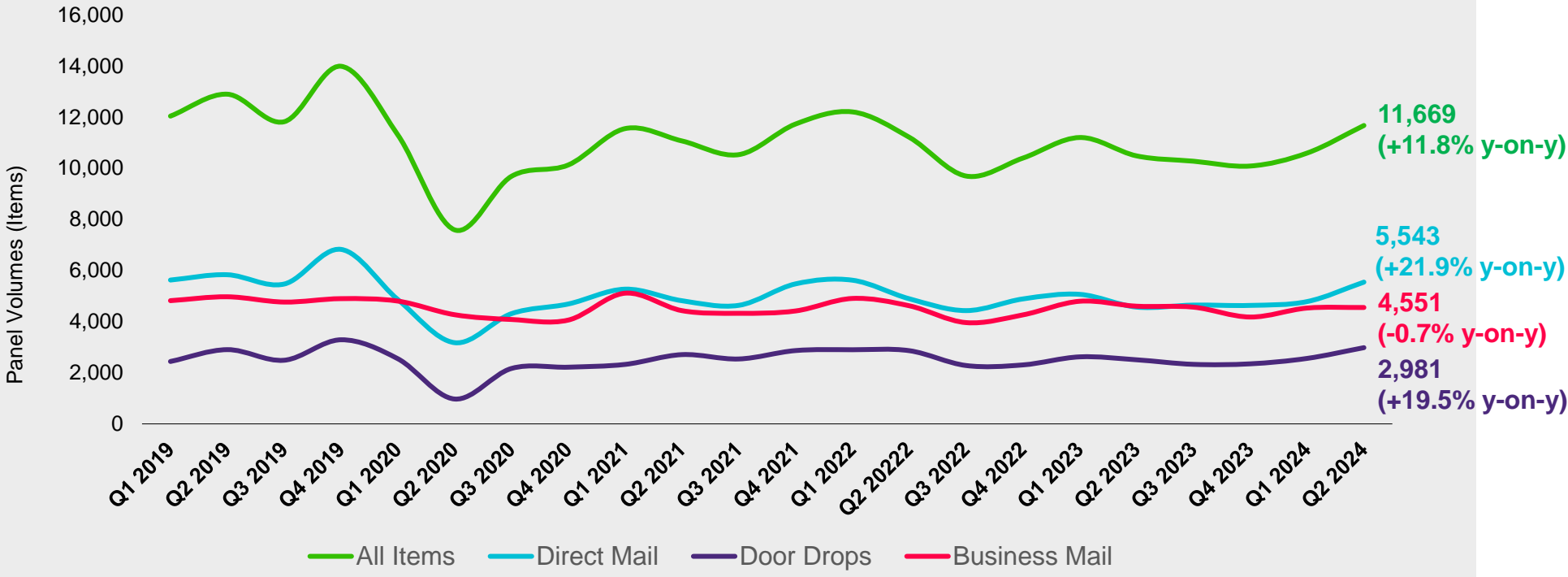
Political mail tended to stay in the home for five days on average and record around a minute of attention. Its ability to drive discussions contributed to its overall effectiveness.

Younger audiences tended to pay more attention to political Door Drops than DM, as did C1C2 households. DM attention tended to be higher among 45+ year olds and was well distributed by social grade.

# Panel volumes up 12% year-on-year in Q2 2024

Quarterly panel volumes were at their highest level in over two years in Q2 2024, buoyed by a strong performance from both Direct Mail (up 22% year on year) and Door Drops (up 20% year on year)

### JICMAIL Panel Volumes Q1 2019 to Q2 2024 (no. of mail items)



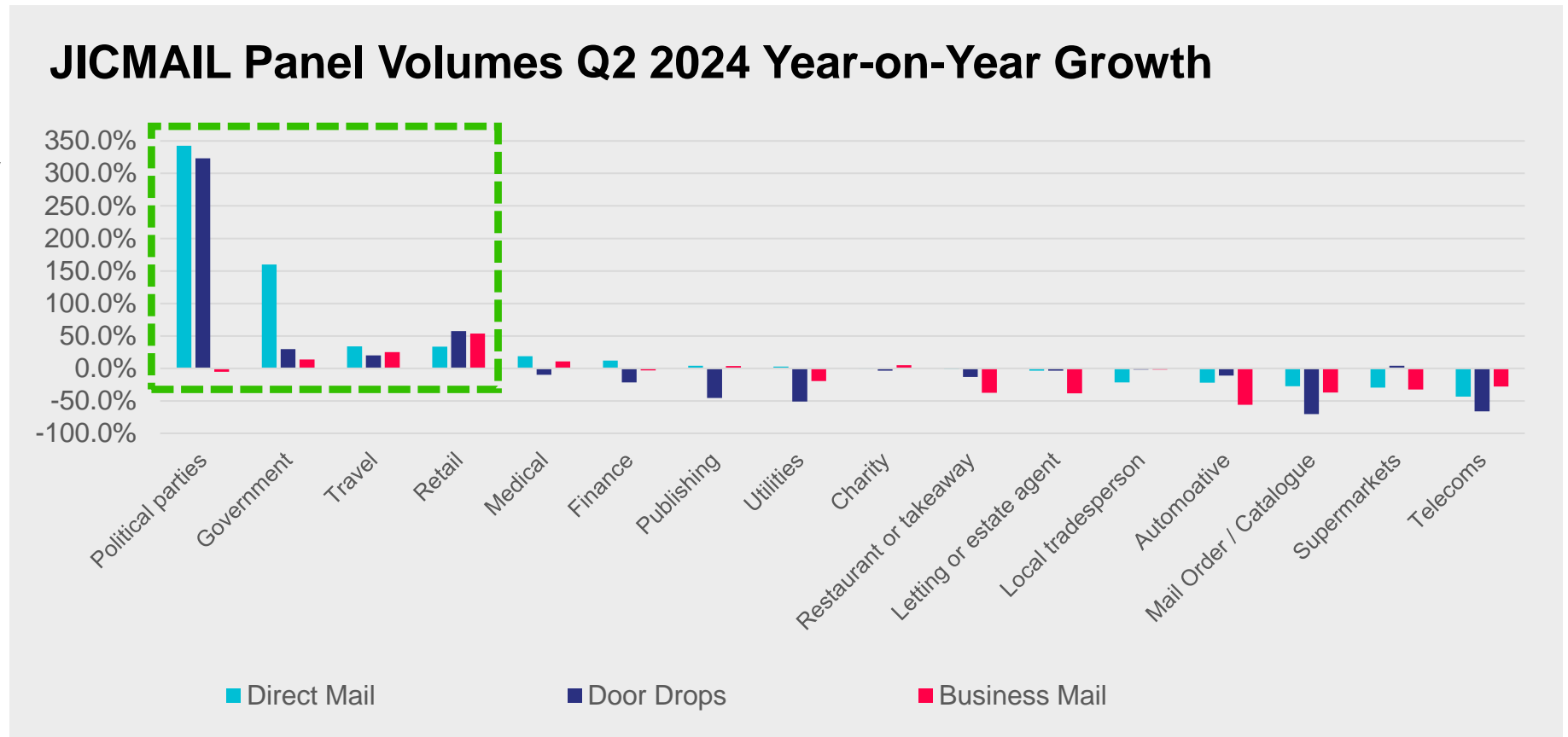
Source: JICMAIL Item Data Q1 2019 to Q2 2024 n=242,092 mail items



# Political mail volumes quadrupled year on year in the run up to the July General Election

As the country geared up for a snap election in July, political parties took full advantage of the opportunity to communicate with voters via the mail channel, with over 300% growth seen in volumes across DM and Door Drops.

Government, Travel and Retail mail volumes also contributed to growth in Q2.



Source: JICMAIL Item Data Q1 2019 to Q2 2024 n=242,092 mail items

Mail Engagement Q2 2024

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# Reach, Frequency, Lifespan and Attention



Mail Media Metrics

# Mail read rates increase year-on-year to 76%

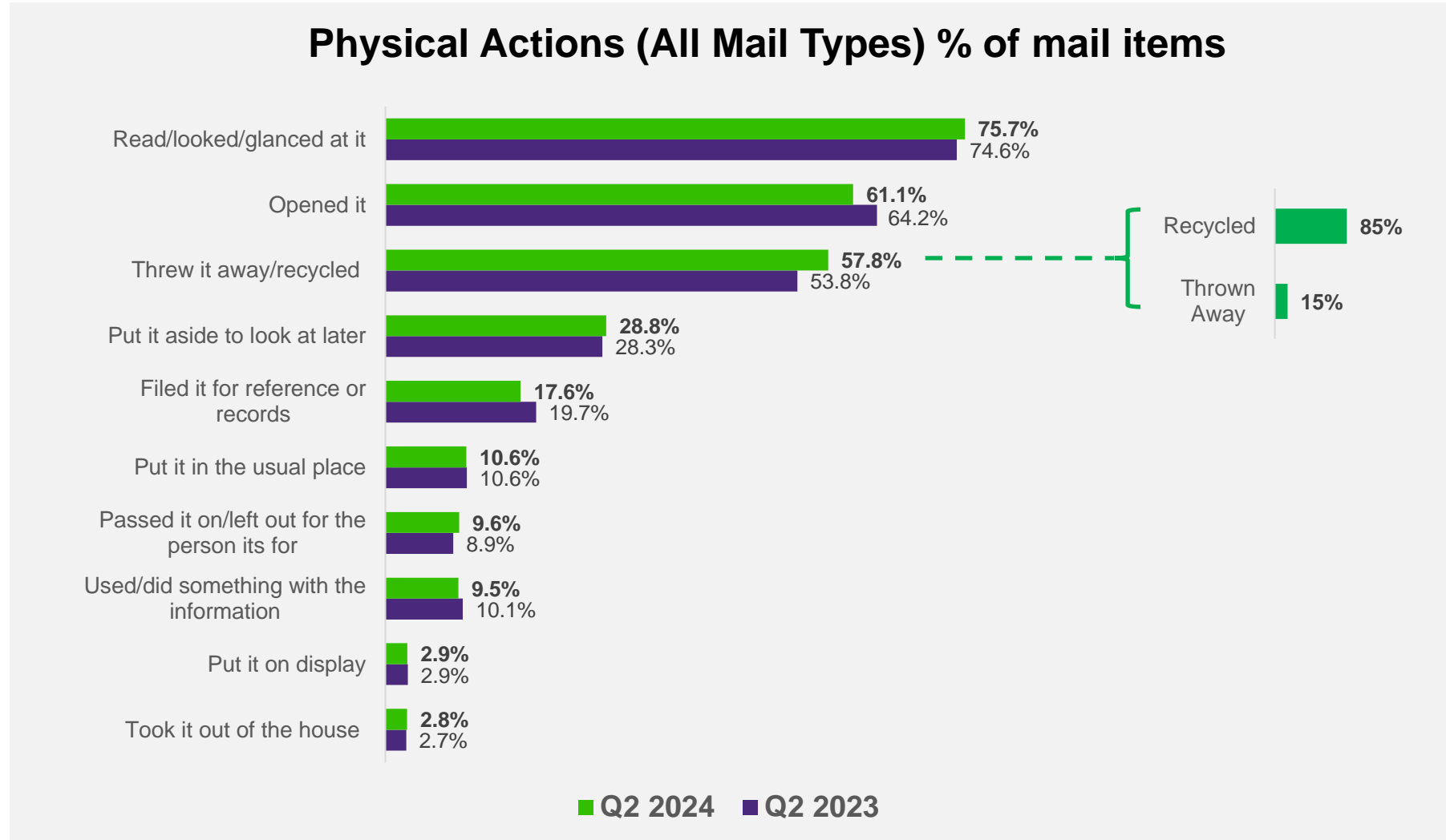
With political mail taking centre stage in Q2, the proportion of mail read, looked or glanced at increased to 76%.

While open rates declined year on year, it should be noted that Door Drops accounted for a greater share of volumes in Q2 2024 vs a year ago (26% vs 24%) – a format that generally isn't open-able.

Of the mail discarded, recycling rates climbed to 85%.



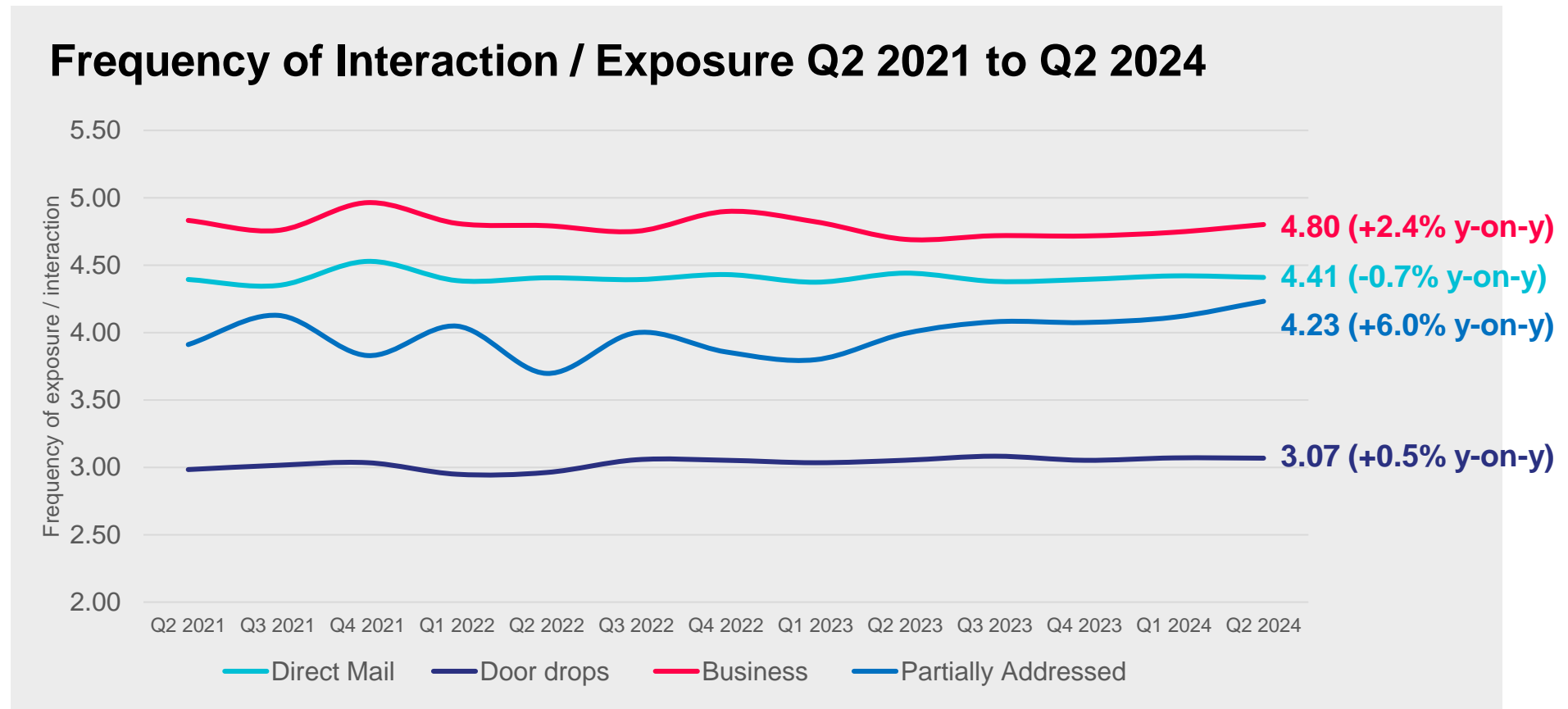
Mail Media Metrics



Source: JICMAIL Item Data Q2 2023 n=10,437 mail items; Q2 2024 n=11,669 mail items

# Q2 2024 frequency of mail interaction increased for three out of the four mail types measured

Despite receiving more mail to interact with in Q2 2024, frequency of interaction remained strong – increasing for Door Drops, Business Mail and Partially Addressed Mail and remaining virtually flat for Direct Mail.

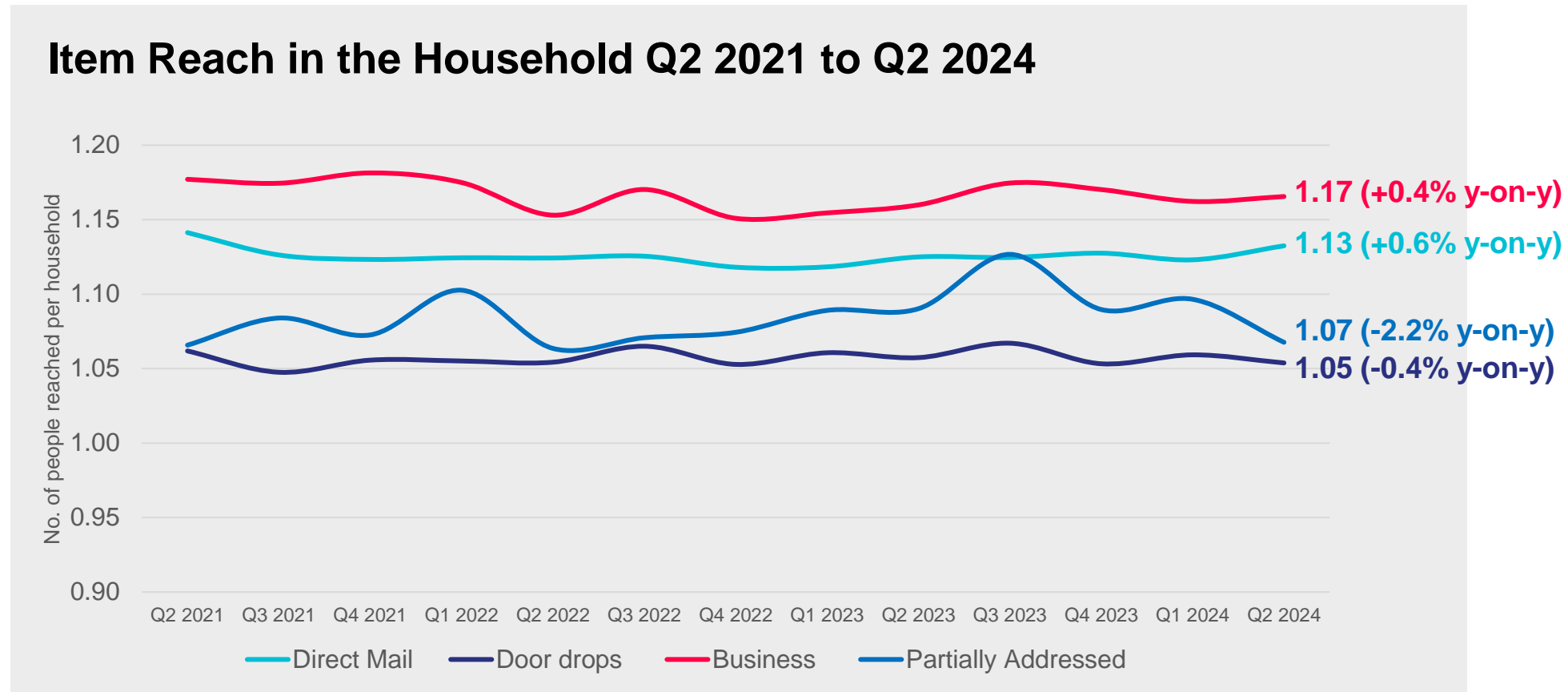


Source: JICMAIL Item Data Q2 2021 to Q2 2024 n=141,114 mail items



# Addressed mail formats recorded marginal improvements in sharing rates in Q2 2024

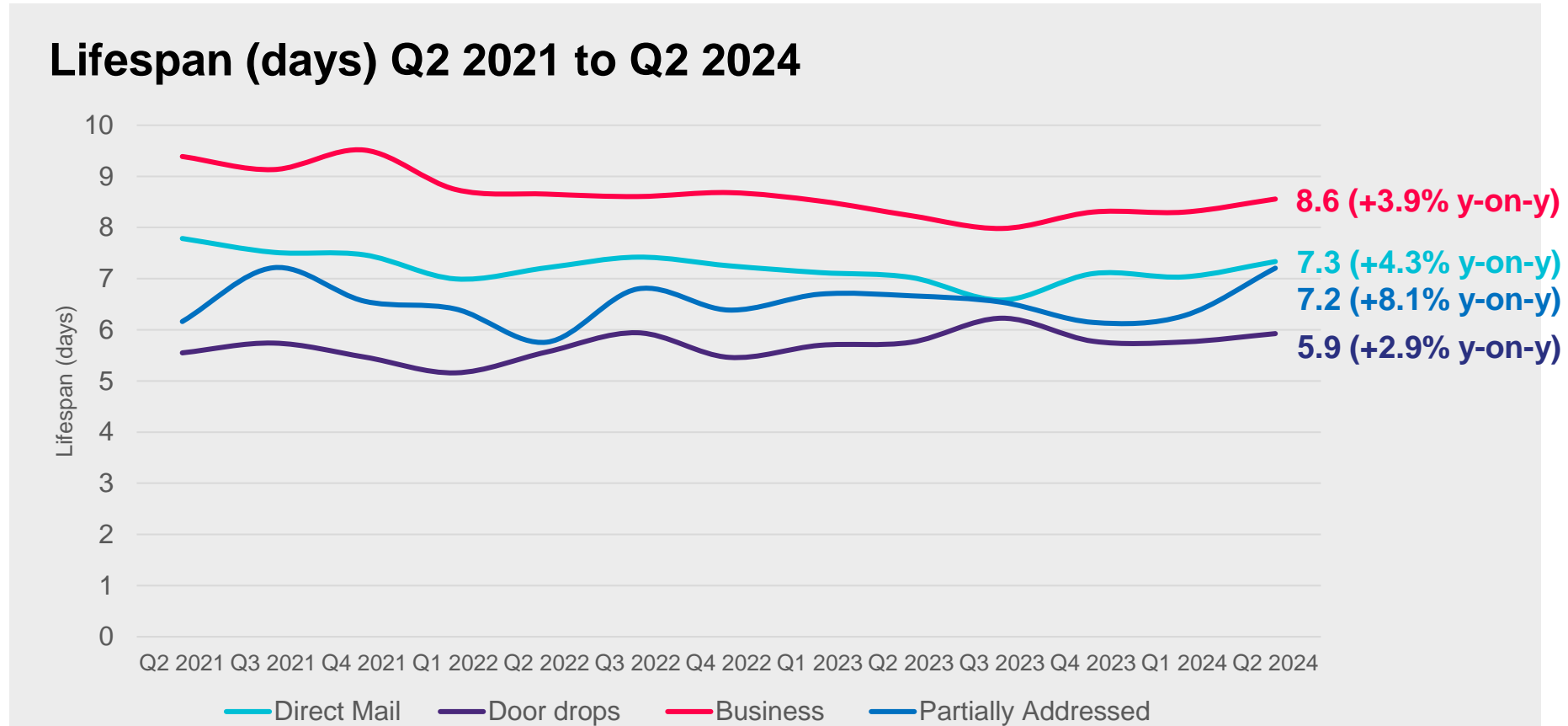
The increases in addressed mail item reach was particularly noted among Direct Mail and Business Mail sent from political parties, indicating a high likelihood of political mail content to be shared with others in the households.



Source: JICMAIL Item Data Q2 2021 to Q2 2024 n=141,114 mail items

# Mail lifespan increased across all formats to its highest point in seven quarters

In a positive quarter for mail volumes and engagement metrics, mail has demonstrated its power to deliver messages that audiences want to retain in their homes at increasing levels.



Source: JICMAIL Item Data Q2 2021 to Q2 2024 n=141,114 mail items

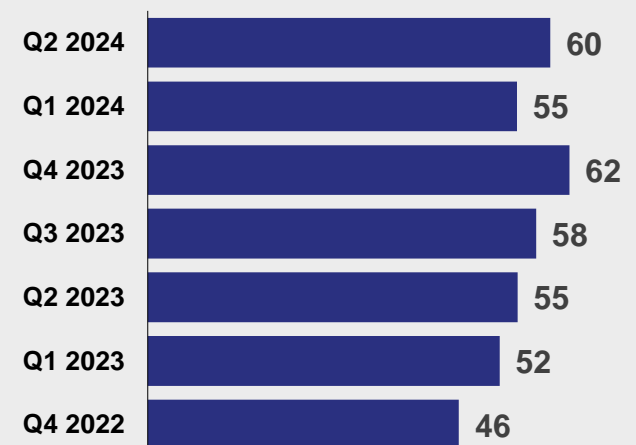
# The average Direct Mail item was engaged with for 132 seconds in Q2 2024. The average Door Drop for 60 seconds

Attention remains strong across the mail channel. It should be noted that attention metrics represent interactions with the mail item across any household member.

## Direct Mail Attention (seconds interacted with per item)

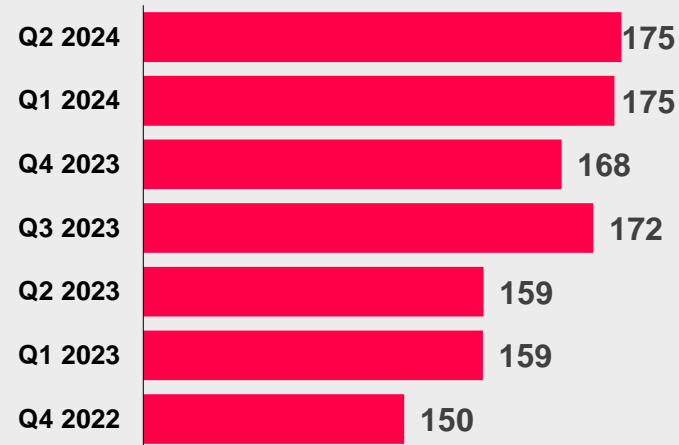


## Door Drop Attention (seconds interacted with per item)

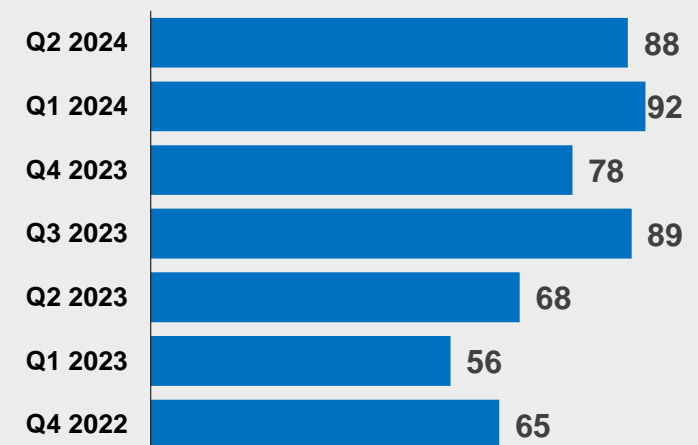


# Business Mail and Partially Addressed attention levels stable quarter-on-quarter

## Business Mail Attention (seconds interacted with per item)



## Partially Addressed Mail Attention (seconds interacted with per item)



Mail Effectiveness Q2 2024

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# Commercial Actions



Mail Media Metrics

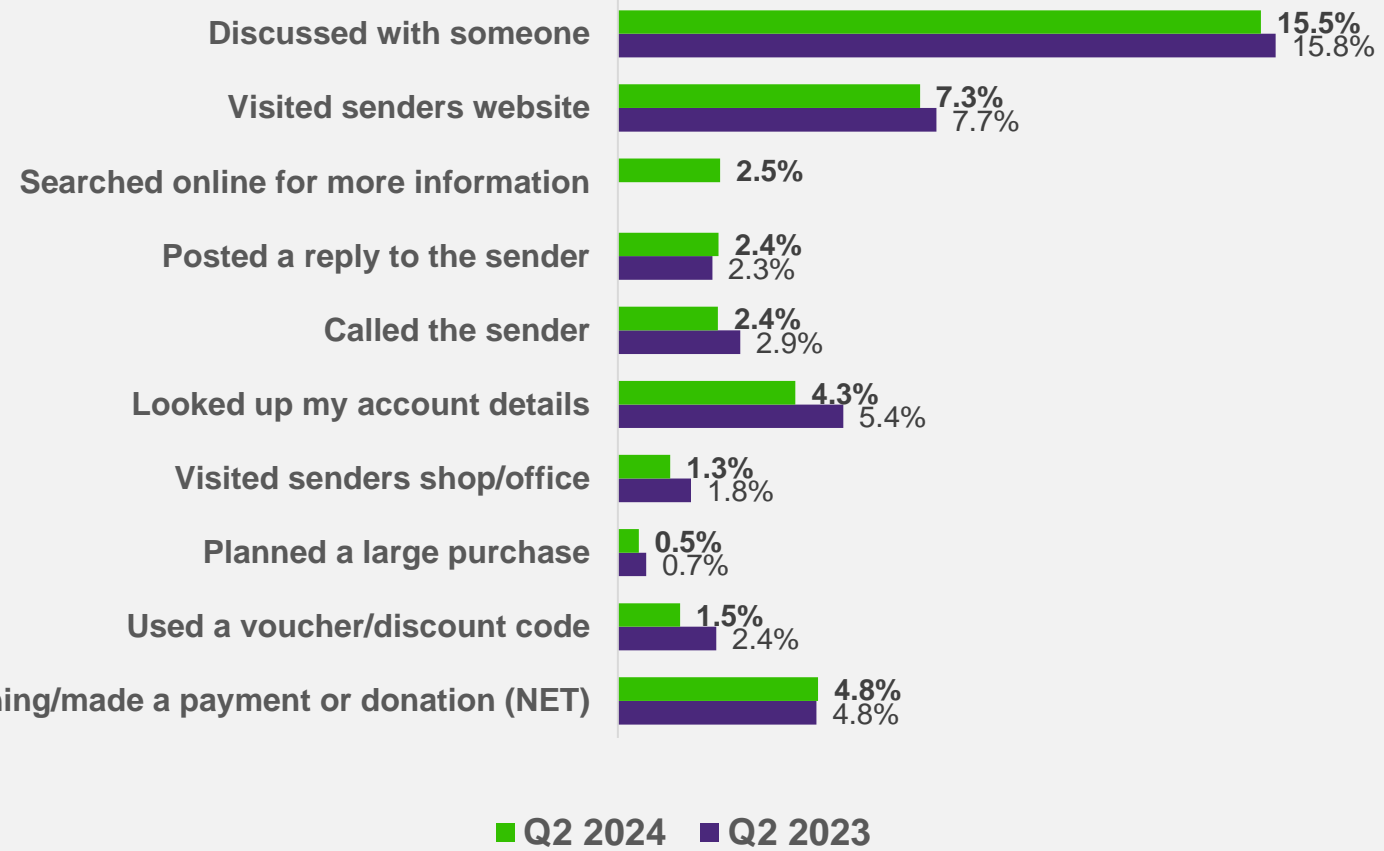
# Commercial actions have to an extent been diluted by large volumes of political mail in Q2 2024

Brand Discovery {

Customer Engagement {

Purchase {

### Commercial Actions (All Mail Types) % of mail items

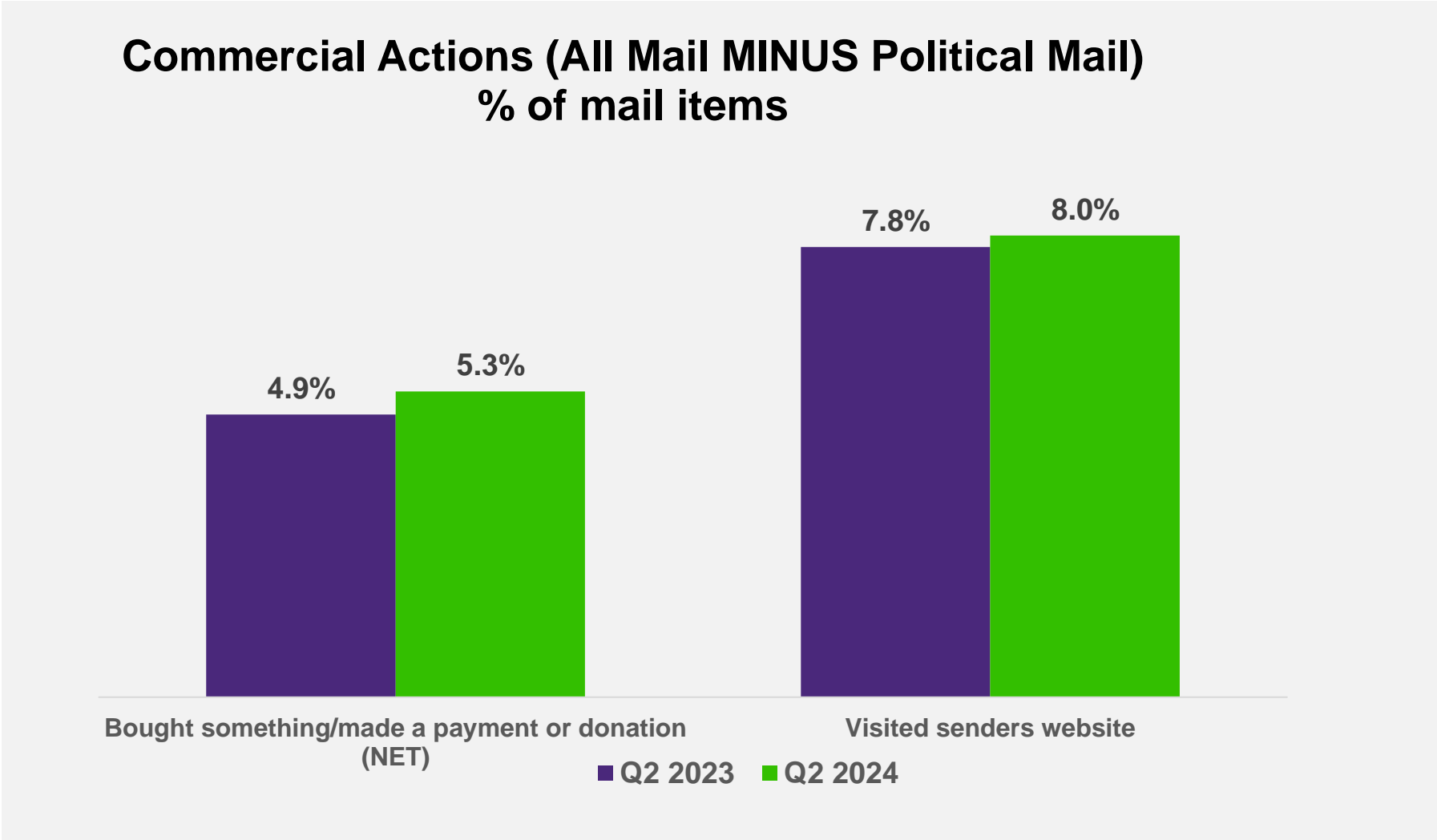


Source: JICMAIL Item Data Q2 2023 n=10,437 mail items; Q2 2024 n=11,669 mail items

# When political mail is stripped out of the data set, website visits and purchases driven by mail have increased year on year

While political party mailings have boosted panel sample sizes and engagement rates, many of the commercial actions tracked do not overtly relate to the political sector.

Once political mailings have been stripped out of the database, a picture of continued year on year improvement in purchases and website visits emerges.

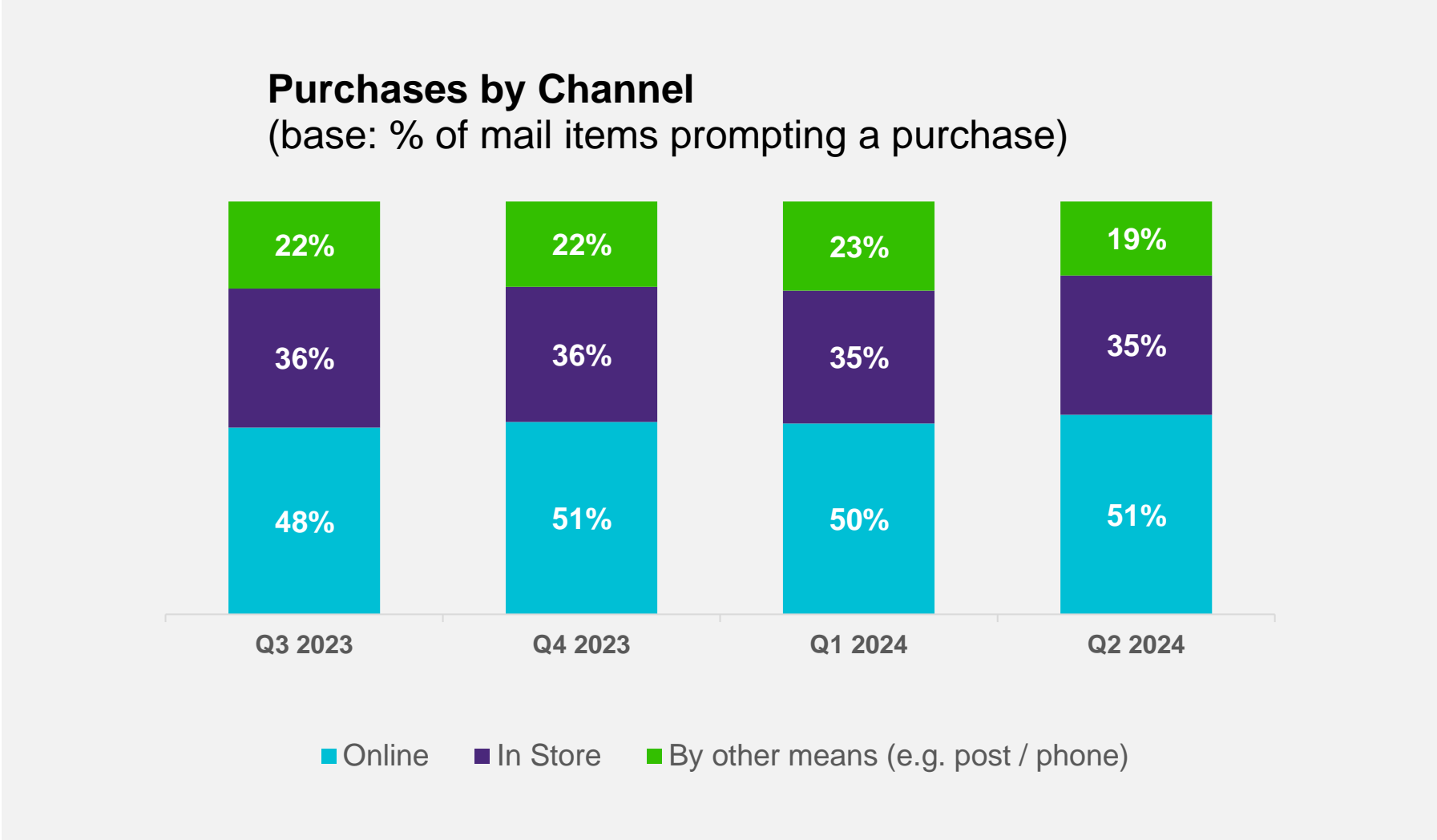


Source: JICMAIL Item Data Q2 2023 n=10,154 mail items minus political mail; Q2 2024 n=10,467 mail items minus political mail

# Half of all purchases prompted by mail are transacted online

JICMAIL has now been tracking a more granular view of purchase behaviours for four quarters.

The proportion of purchases transacted online has increased from 48% in Q3 2023 to 51% in Q2 2024.



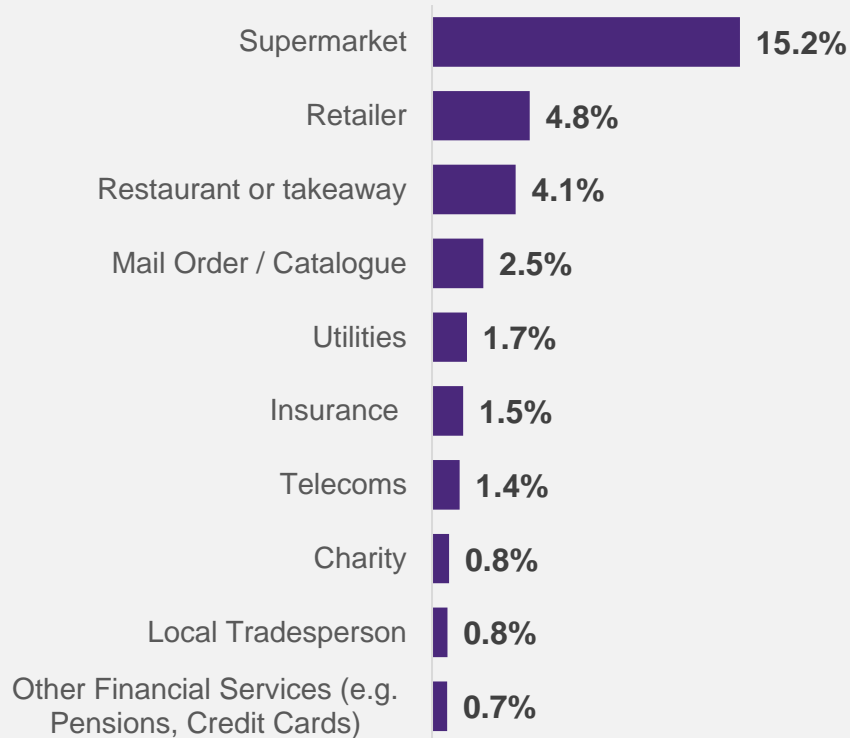


# Supermarket mail is most likely to prompt an in-store purchase. Utilities are most likely to drive online response

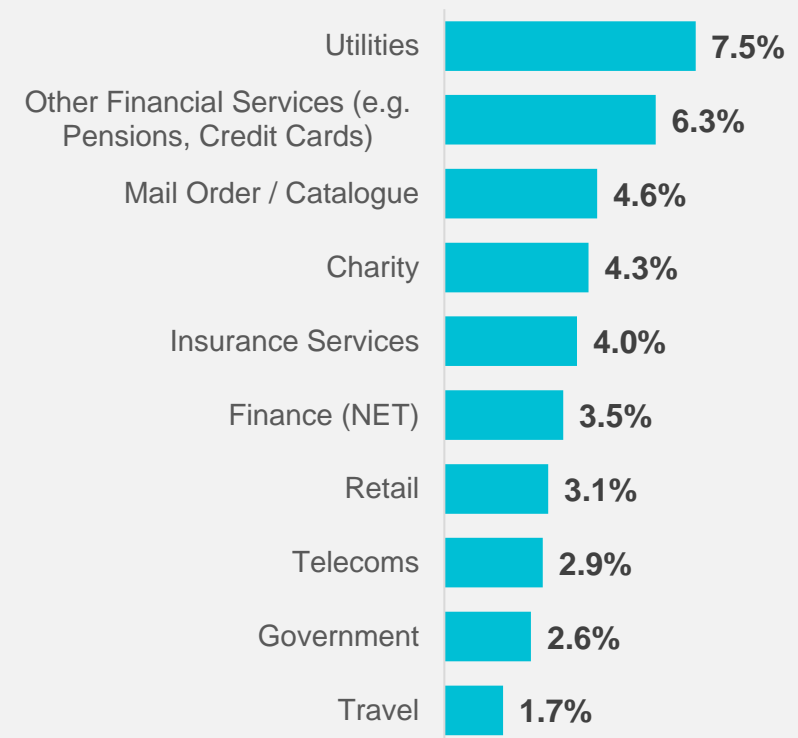
Advertisers with bricks and mortar presence sit at the top of the in-store purchase rankings as would be expected.

Utilities and finance mail tend to be drivers of online response.

### % Mail Prompting **In Store** Purchases (all mail types)



### % Mail Prompting **Online** Purchases (all mail types)



Source: JICMAIL Item Data Q2 2024 n=11,669 mail items



Mail Sector Performance Q2 2024

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# Key Political Mail Metrics



Mail Media Metrics

# Direct Mail and Door Drops from political parties were kept in the home for around five days

The average piece of Direct Mail from political parties reached an additional 13% per household, while for Door Drops the figure was +7%.

Political mailings were interacted with for around a minute on average – a figure slightly higher for DM vs Door Drops.



Mail Media Metrics

## Political Party Key Mail Metrics Q2 2024

	Direct Mail	Door Drops
<b>Item Reach</b> (people in household)	1.13	1.07
<b>Frequency</b> (no. of interactions)	3.56	3.11
<b>Lifespan</b> (days live in the home)	5.48	4.77
<b>Attention</b> (seconds interacted with)	65.63	58.72

Source: JICMAIL Item Data Q2 2024 n=1,192 political mail items

# Political mail's primary strength is as a conversation catalyst

Political parties capitalised on mail's talkability factor in Q2 2024, with 15% of political DM generating conversations in the households, and 12% of Door Drops doing the same.

## Political Party Key Commercial Actions Q2 2024 (% of mail items prompting action)

	Direct Mail	Door Drops
Discussions	14.6%	11.9%
Digital Response	1.8%	1.4%
Posted Reply	2.9%	-

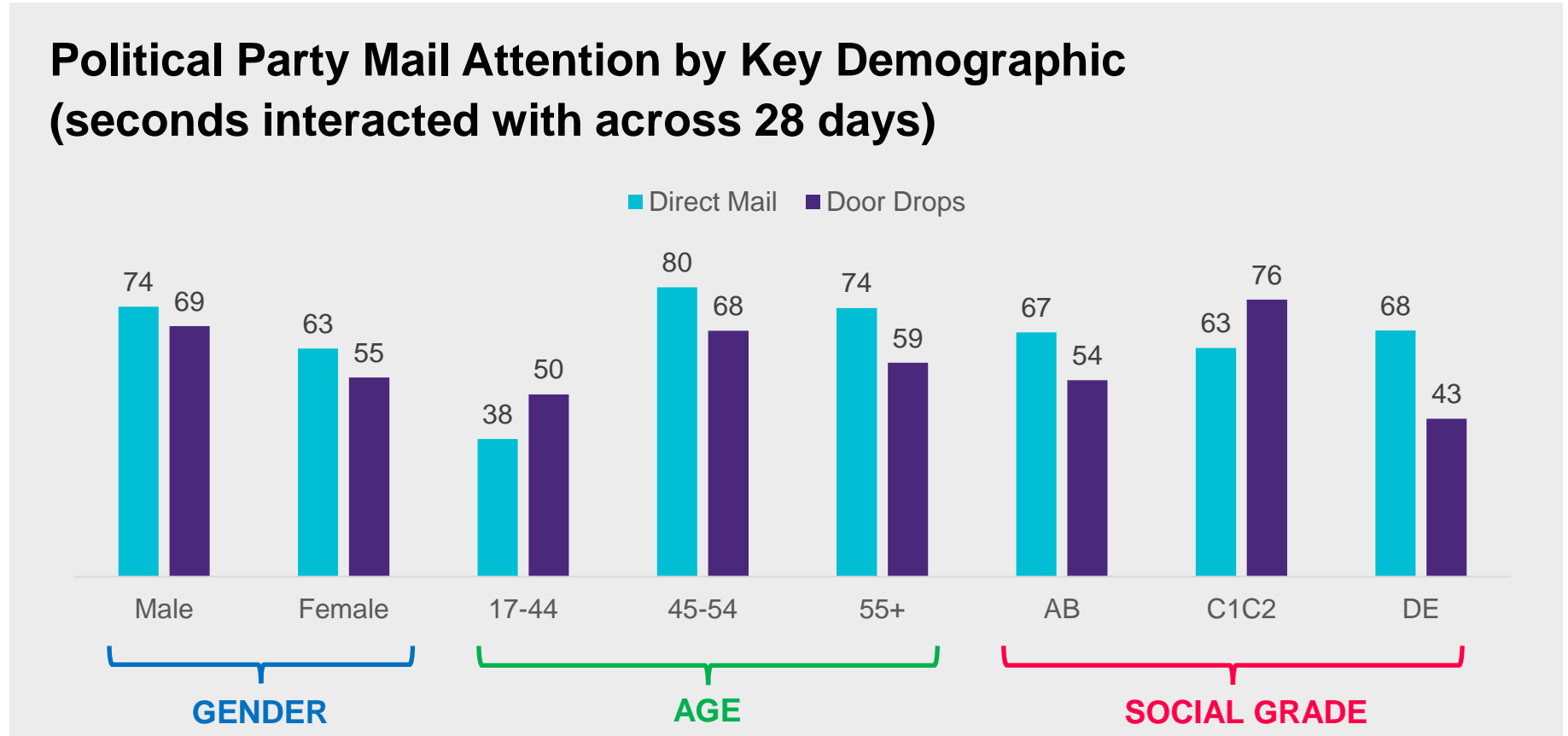


# Who paid the most attention to political party mail?

Political mail that reached households with men and 45-54 year olds tended to record the highest attention.

Younger audiences tended to pay more attention to political Door Drops than DM, as did C1C2 households.

DM attention tended to be higher among 45+ year olds and was well distributed by social grade.



Advertiser Activity Q2 2024

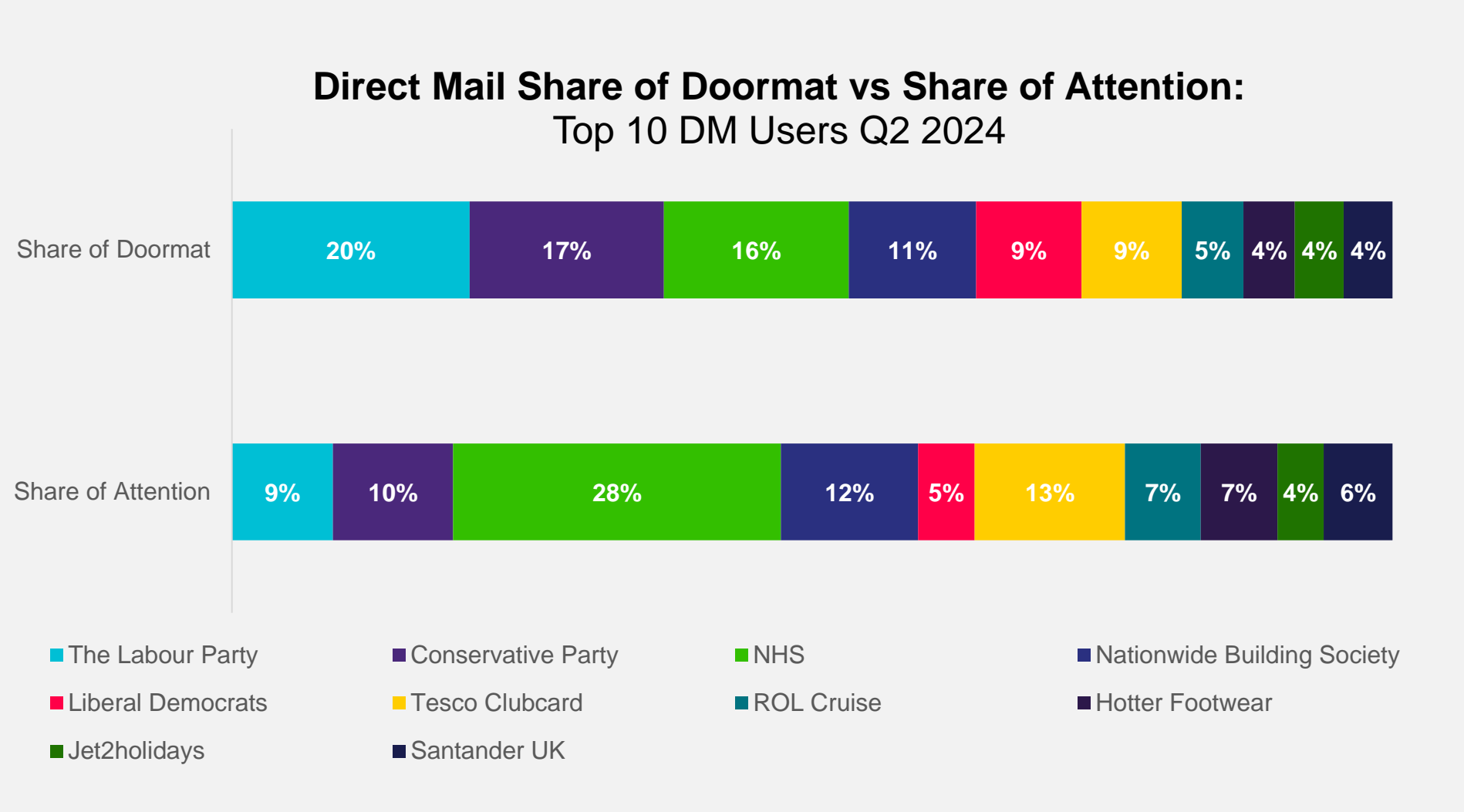
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# Share of Doormat and Attention

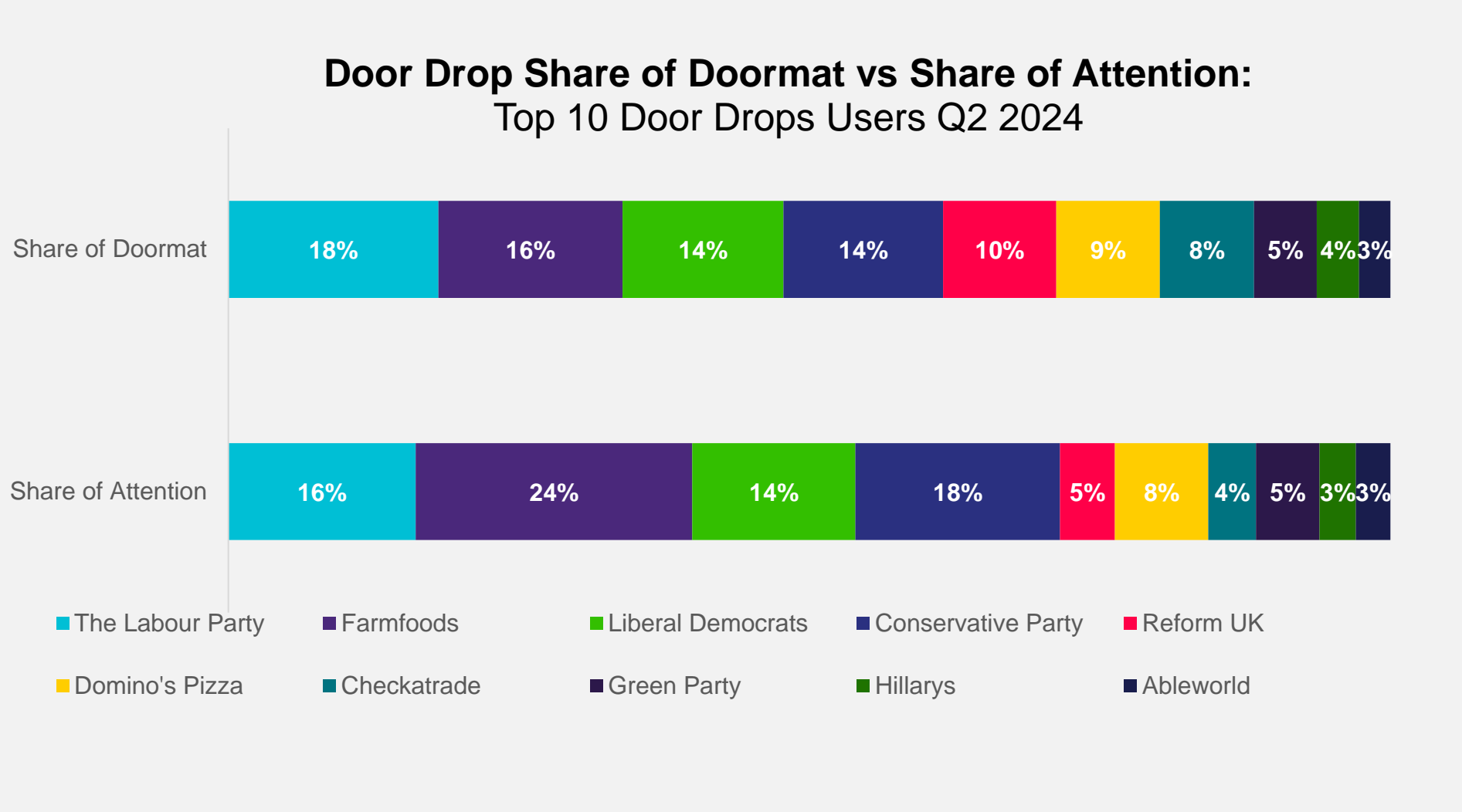


Mail Media Metrics

# While the Labour and Conservative parties topped the DM volume rankings, mail from the NHS was number one for attention

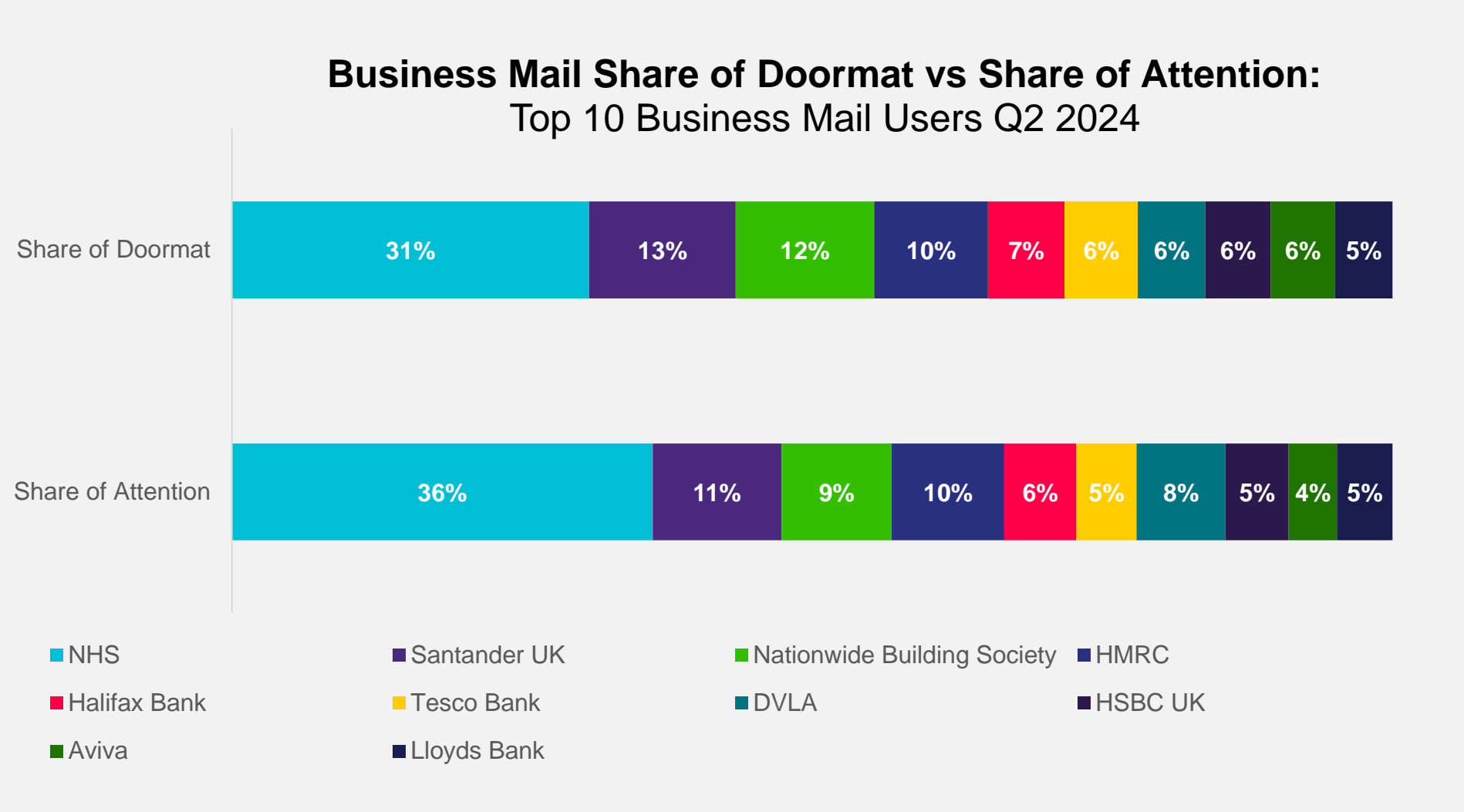


# Farmfoods and The Conservative Party again command a disproportionately high share of Door Drop attention





# Share of doormat and attention fairly well aligned for Business Mail. NHS number one on both counts



1.

## Panel Volumes

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## Engagement and Effectiveness

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# Thanks

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