

# JICMAIL Quarterly Results

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Q3 2024

**JIC  
MAIL**

Mail Media Metrics

# Q3 2024 Highlights



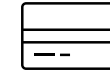
**+5%**

Increase in JICMAIL panel volumes year-on-year



**76%**

Of mail was read or looked at (up 1% y-on-y)



**6%**

Of mail drove purchases: nearly half of which were transacted online



**8.7 days**

Average lifespan for Business Mail (up 9% y-on-y)



**9%**

Of mail prompted a website visit. 2.5% resulted in an email send



**134 secs.**

Spent with the average piece of DM. **56 seconds** with Door Drops. Strong relationship between attention and effectiveness.



**87%**

Of discarded mail was recycled. Up 14% points year on year





## Panel Volumes

Panel volumes increased by 5% in Q3 202. DM volumes grew across the medical, travel, supermarket and retail sectors; while Door Drop volumes were up across all sectors apart from charities and automotive. Business Mail volumes declined -4.4%.



## Engagement and Effectiveness

Mail engagement remained stable across most mail types, with Business Mail recording particular growth in frequency of interaction and lifespan. A strong linear relationship between attention and effectiveness is still seen, with levels highest among mail reaching existing customers.



## New reporting variables one year on

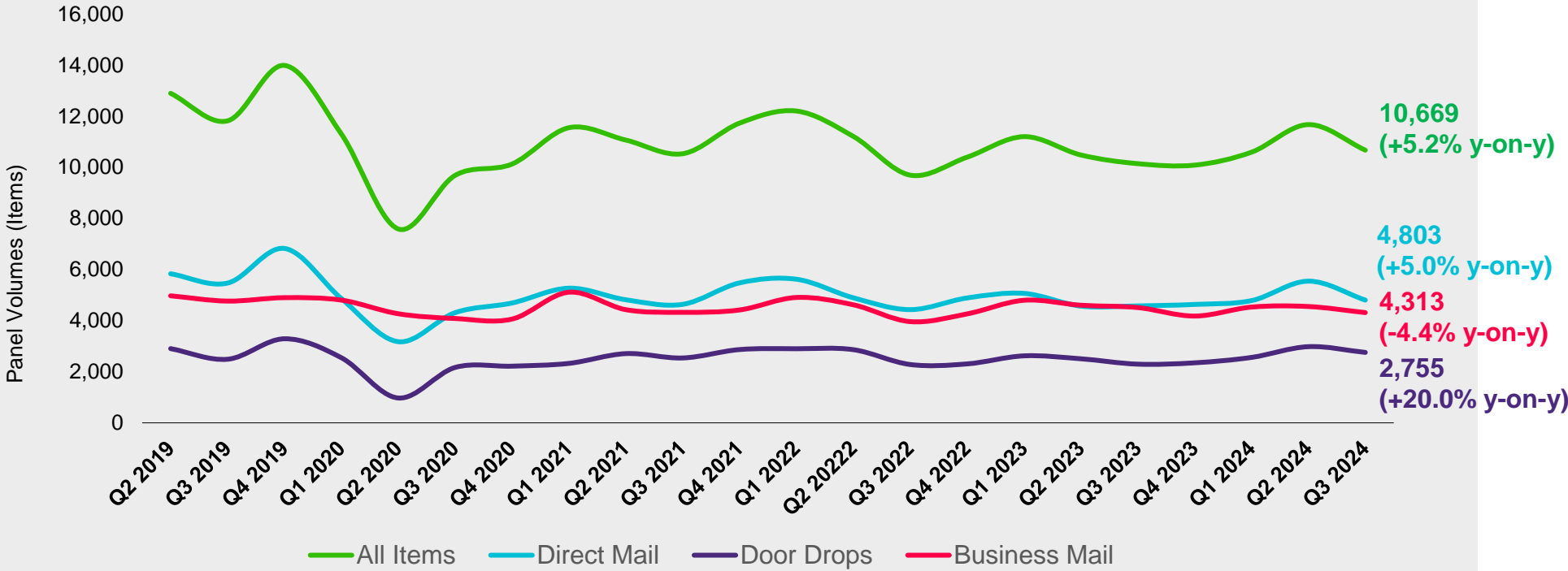
Mail recycle rates have grown +14% in just 12 months. 87% of all discarded mail is now recycled.

6% of all mail drives a purchase – most commonly online (45%) vs in store (36%).

# Panel volumes grew for second quarter in a row in Q3 2024

Door Drops (+20% year and year) and Direct Mail (+5%) were the key contributors to volume growth, with Business Mail volumes declining - 4.4% year on year.

### JICMAIL Panel Volumes Q2 2019 to Q3 2024 (no. of mail items)

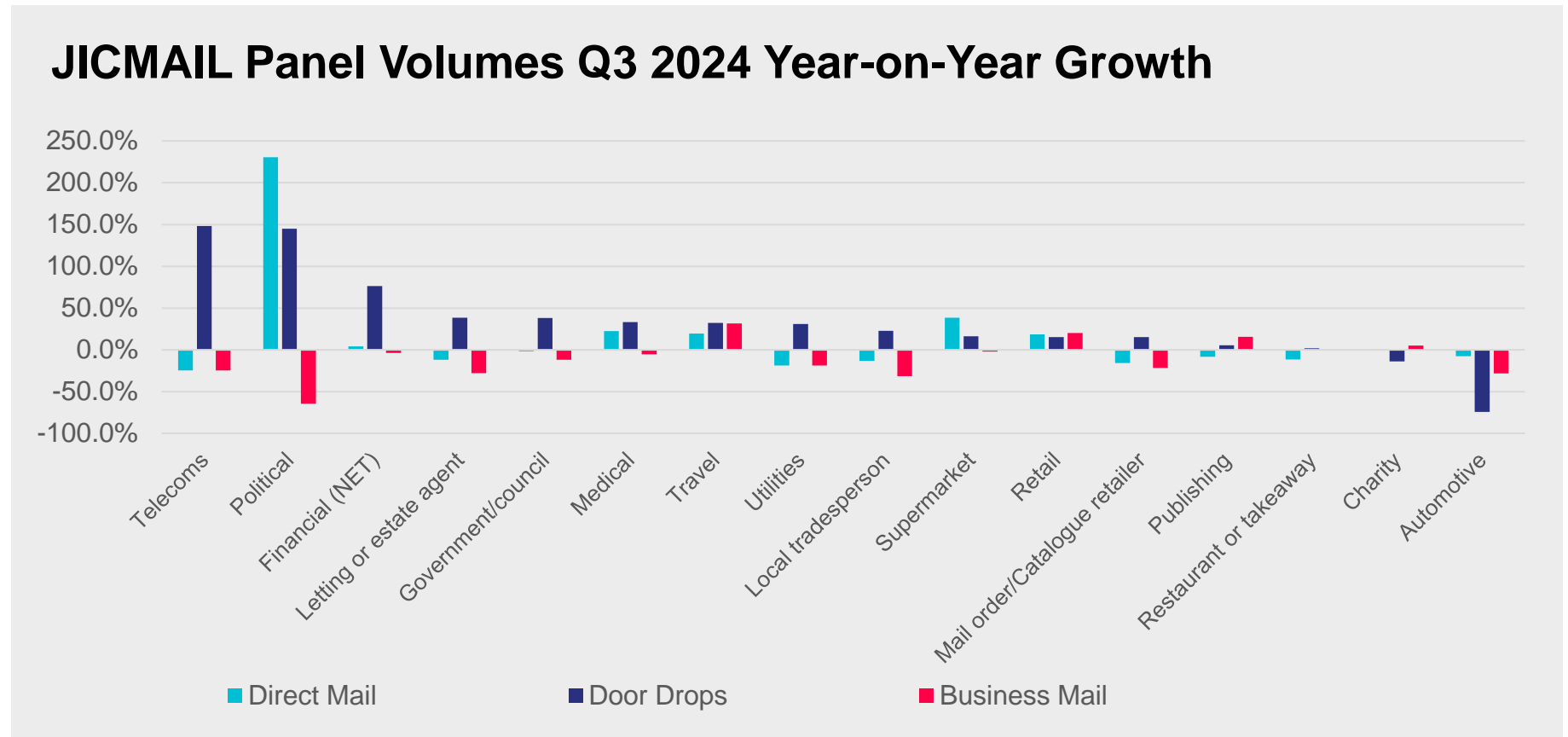


Source: JICMAIL Item Data Q2 2019 to Q3 2024 n=213,917 mail items

# Door drop volumes up across nearly all sectors

DM volumes were up across the medical, travel, supermarket and retail sectors.

Door Drop volumes up across all sectors apart from charities and automotive.



Source: JICMAIL Item Data Q2 2019 to Q3 2024 n=213,917 mail items

**Mail Engagement Q3 2024**

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# **Reach, Frequency, Lifespan and Attention**



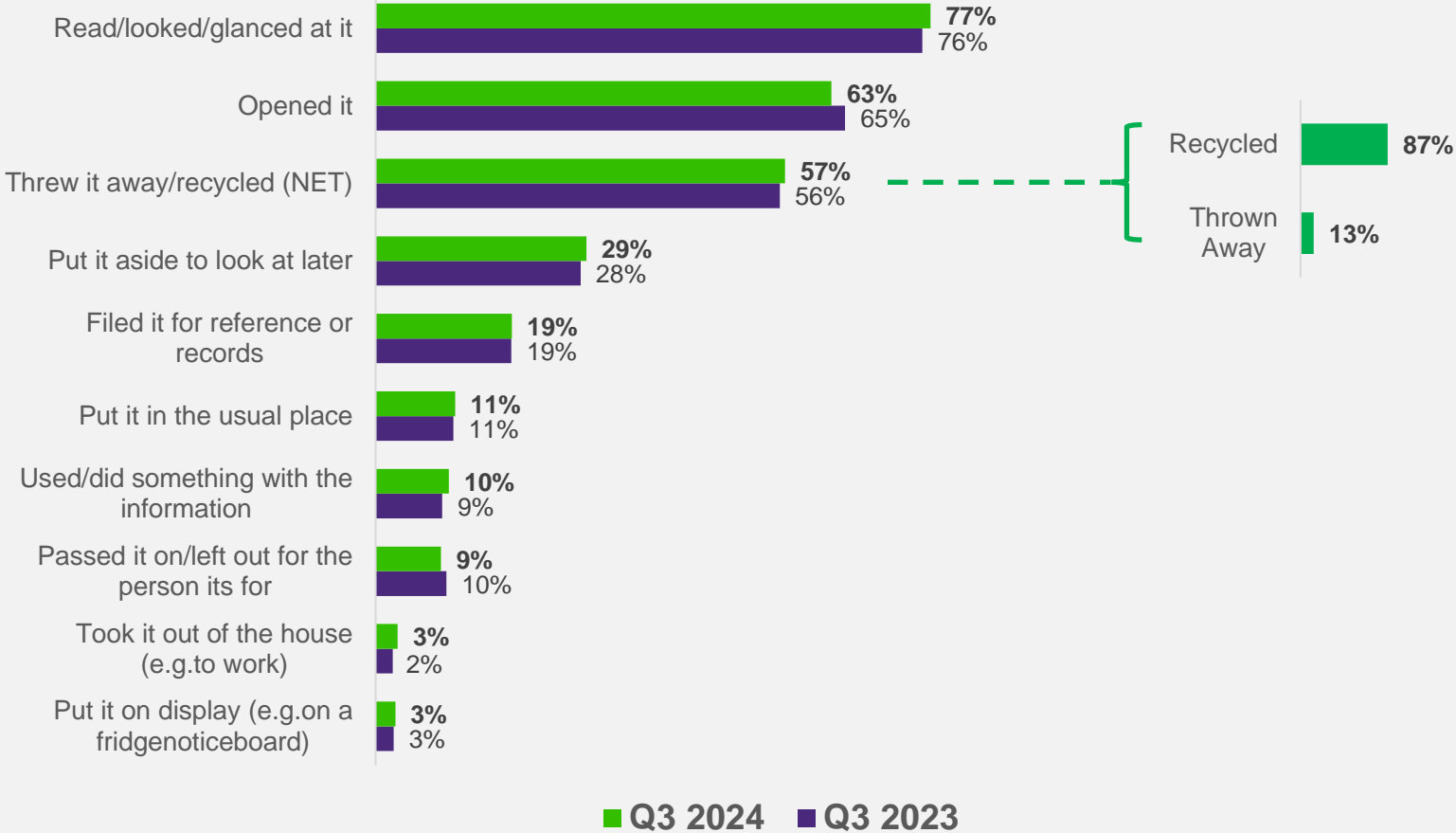
Mail Media Metrics

# Mail read rates up year on year

Marginal decline in mail open rates were in part down to the increased share of Door Drops in the mail type mix.

Door Drops accounted for 26% of volumes in Q3 2024 vs 23% a year prior.

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

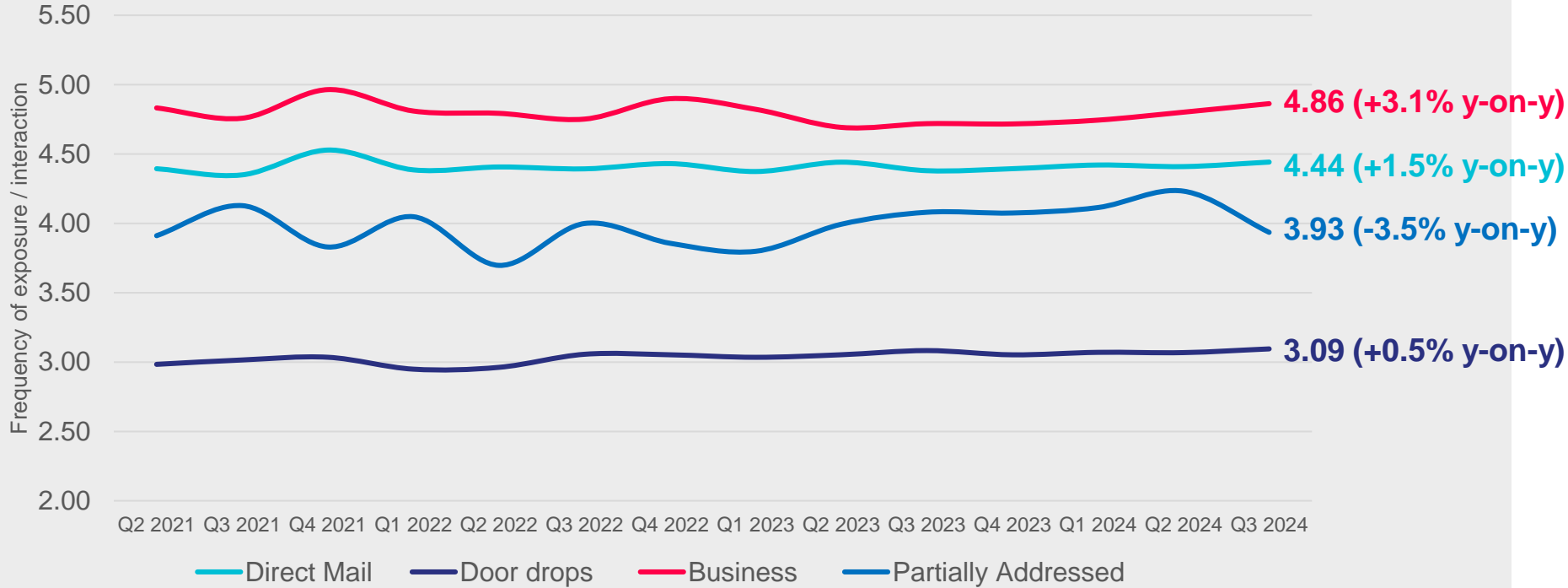


Source: JICMAIL Item Data Q3 2023 n=10,141 mail items; Q3 2024 n=10,669 mail items

# Business Mail records strongest frequency growth

Only Partially Addressed Mail saw interaction rates decline year on year, with all other formats growing in engagement levels.

### Frequency of Interaction / Exposure Q2 2021 to Q3 2024

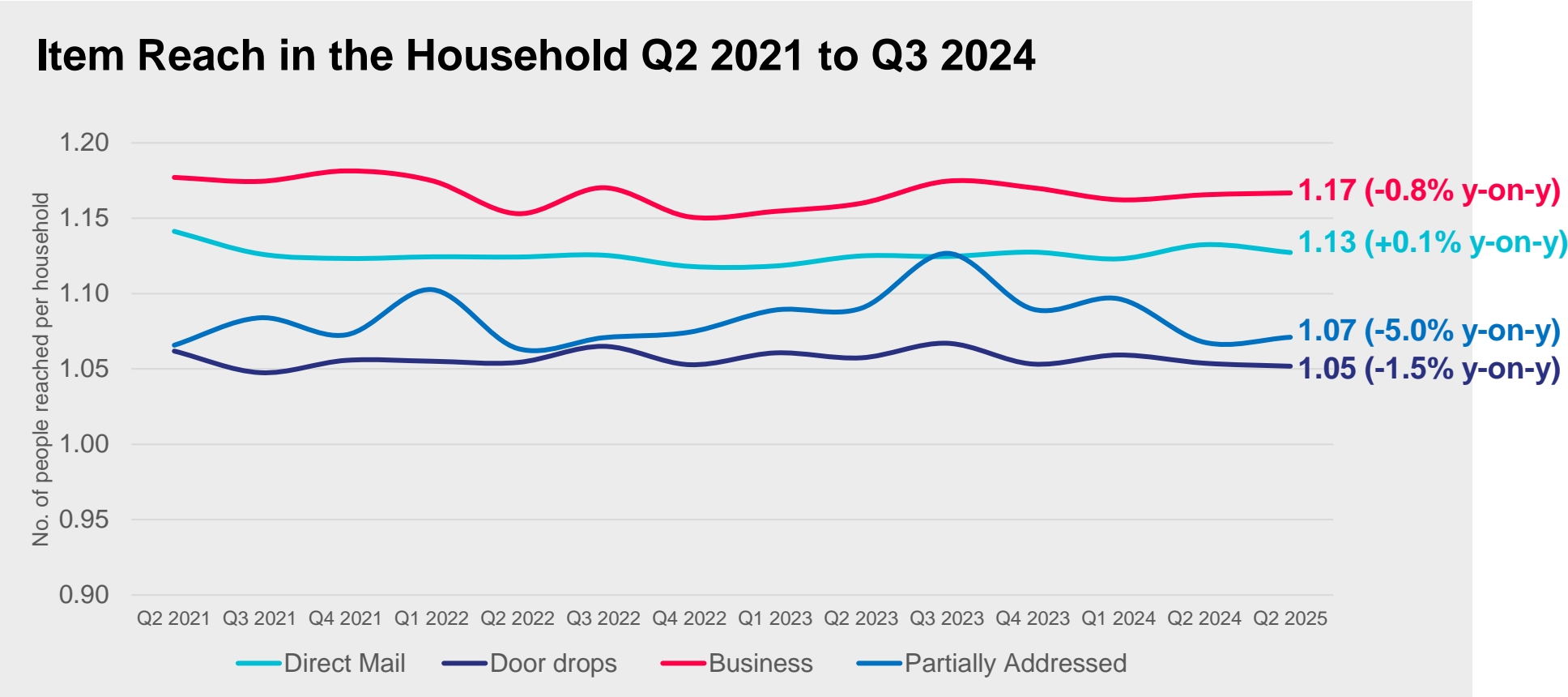


Source: JICMAIL Item Data Q2 2021 to Q3 2024 n=150,236 mail items



# Addressed Mail sharing rates stable year on year

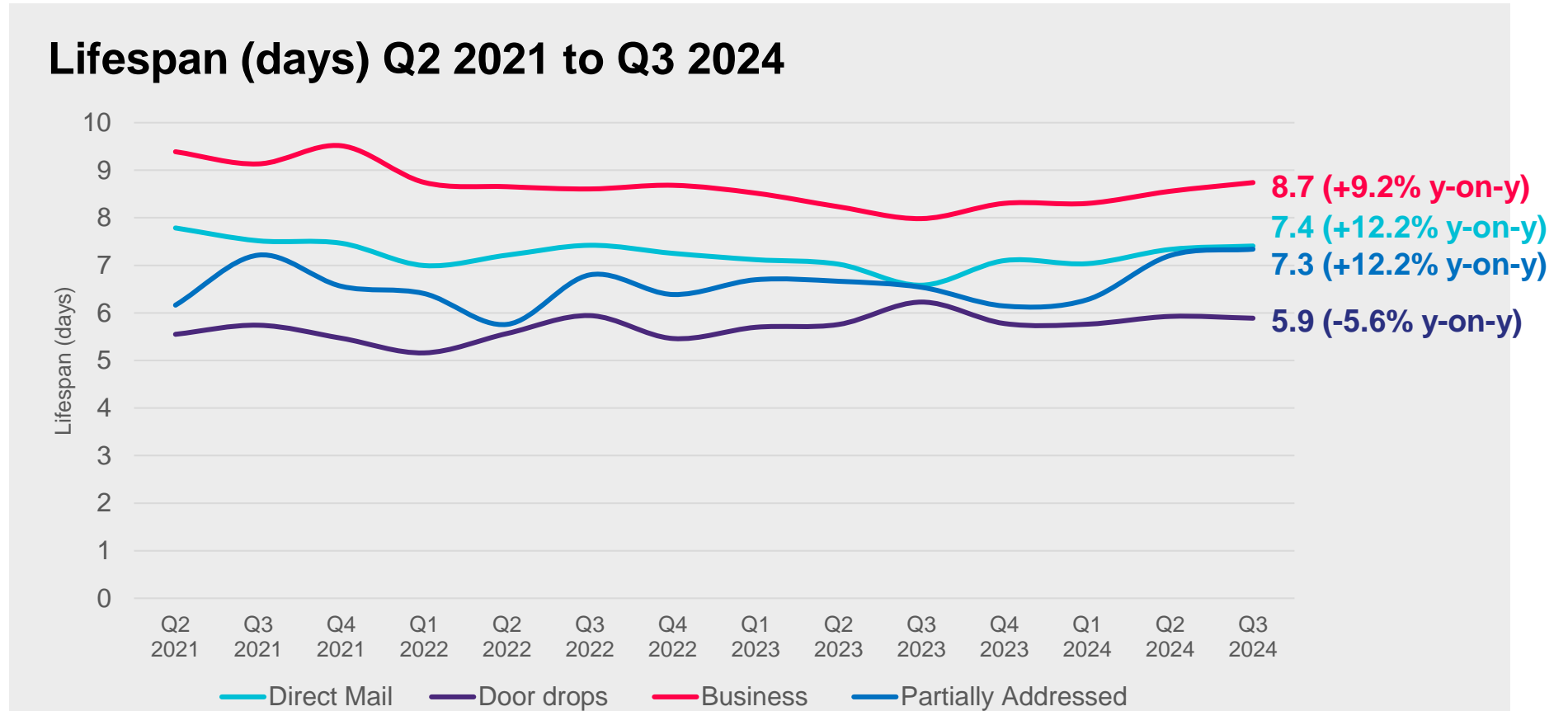
Partially Addressed Mail Item Reach has declined -5% year on year, although with a smaller volume sample size, mail metrics for PAM do fluctuate more than for the other mail types.



Source: JICMAIL Item Data Q2 2021 to Q3 2024 n=150,236 mail items

# Strong growth in lifespan for most mail types

Direct Mail, Business Mail and Partially Addressed all showed strong growth in the amount of time the average item was retained in the home for, while Door Drop lifespan declined.

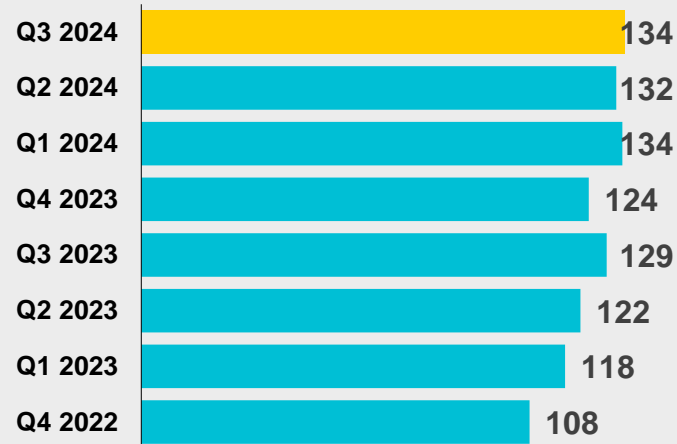


Source: JICMAIL Item Data Q2 2021 to Q3 2024 n=150,236 mail items

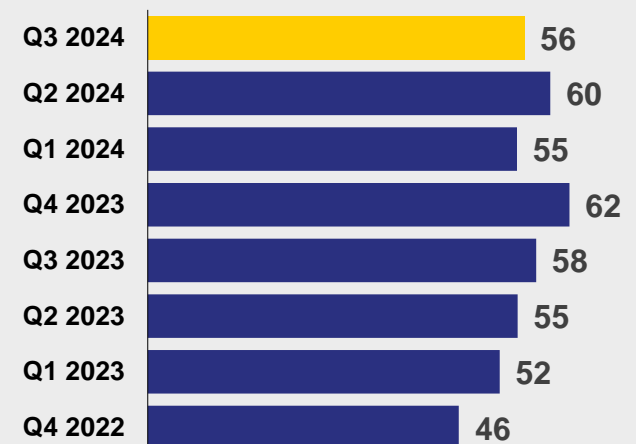
# Stable mail attention year on year

The average Direct Mail item was interacted with for 134 seconds by anyone in the household across a 28 day period in Q3 2024, and the average Door Drop for 56 seconds.

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



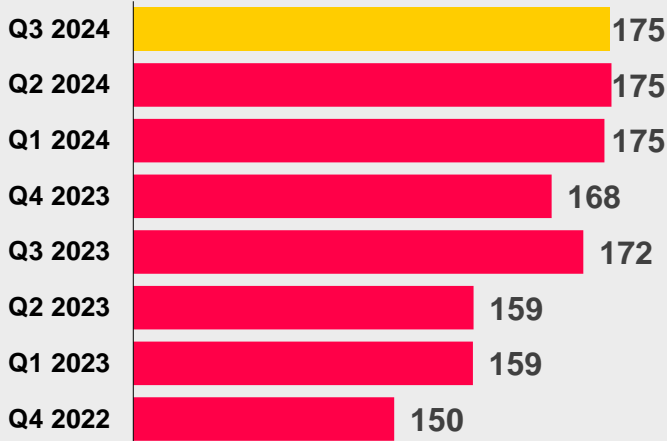
## Door Drop Attention (seconds interacted with per item)



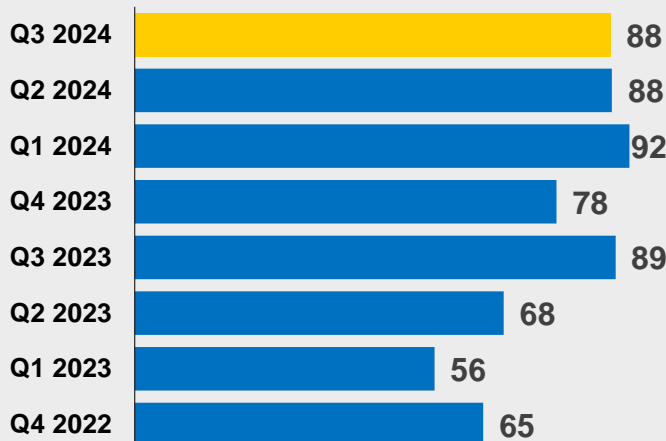
# Business Mail and PAM attention also stable

The average Business Mail item was interacted with for 175 seconds by anyone in the household across a 28 day period in Q3 2024, and the average Partially Addressed item for 88 seconds.

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



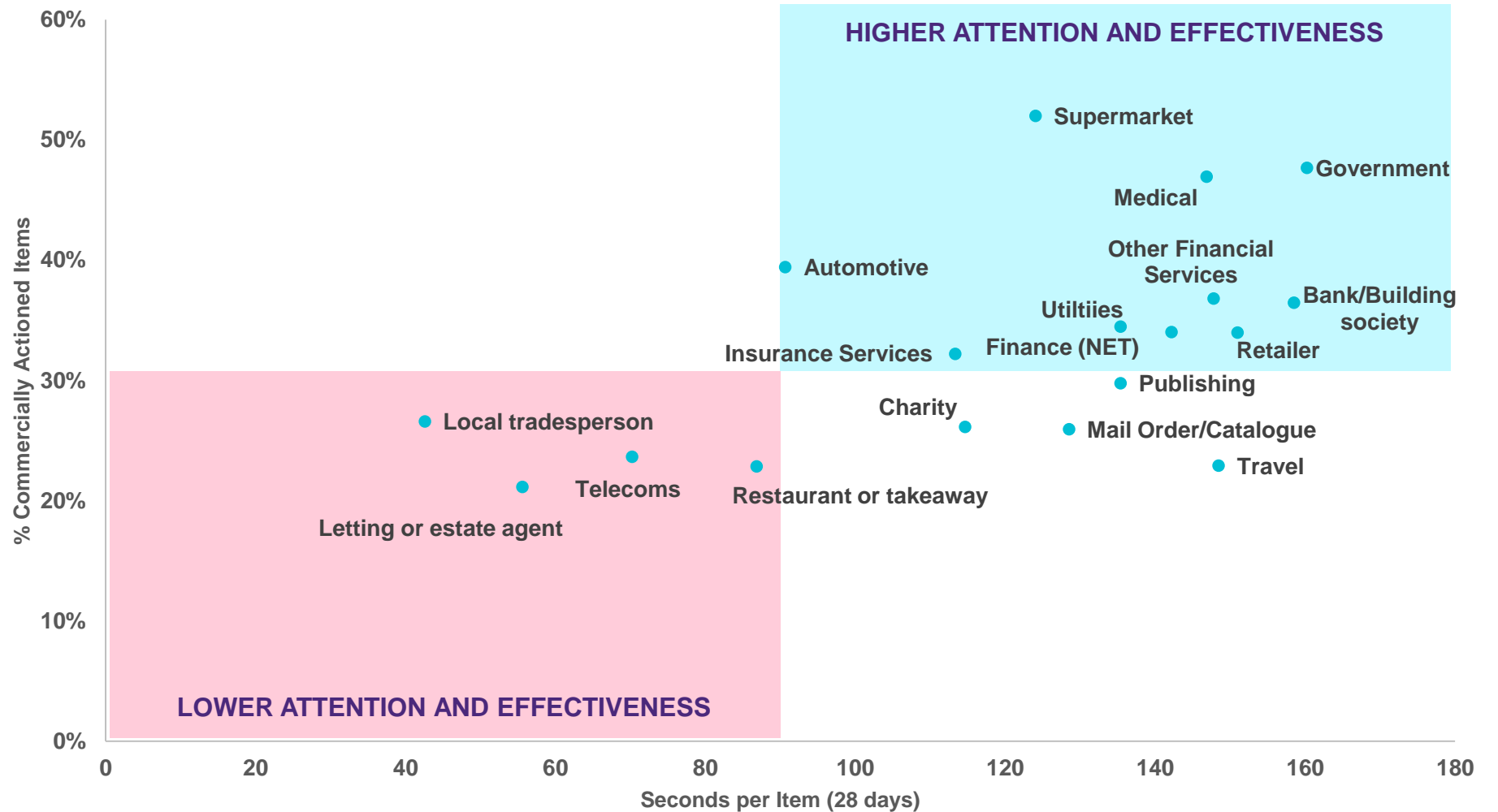
## Partially Addressed Mail Attention (seconds interacted with per item)



# There is a strong relationship between attention and commercial effectiveness

It should be noted that sectors in the lower attention and effectiveness quadrant tend to be users of cold direct mail (i.e. for customer acquisition) rather than warm (i.e. for targeting existing customers).

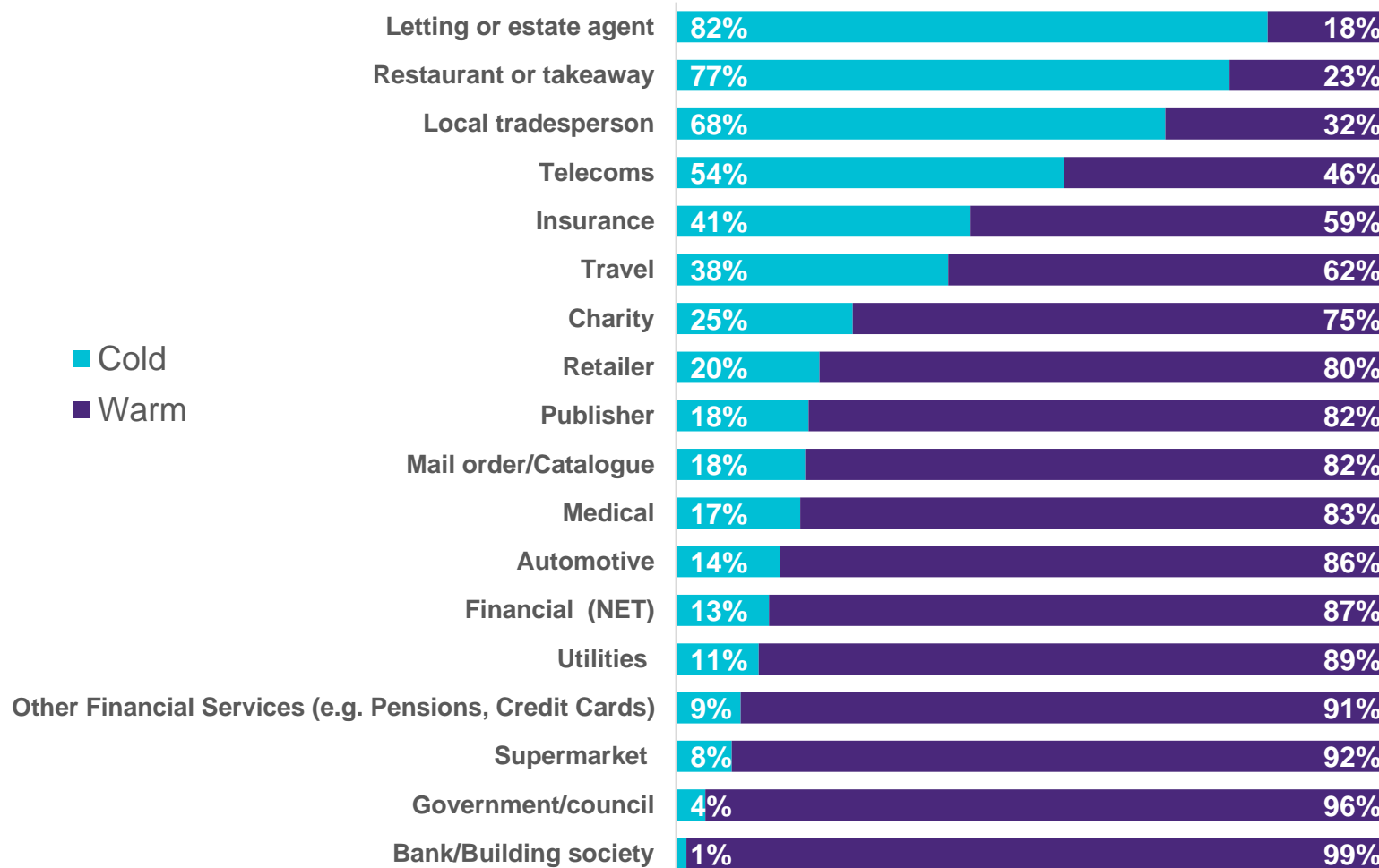
### Direct Mail Attention vs Effectiveness by sector Q3 2024



Source: JICMAIL Item Data Q3 2024 n=4,803 Direct Mail items

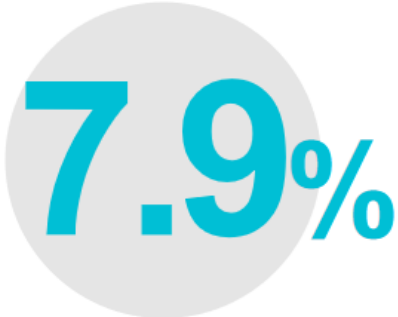
# Majority cold Direct Mail for property, restaurant, tradesperson and telecoms advertisers

## Usage of Cold vs Warm Direct Mail (% of DM items)

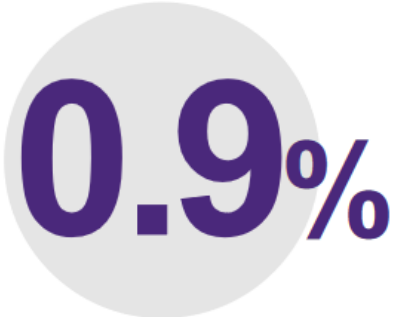


# Reminder: effectiveness should be contextualised accordingly

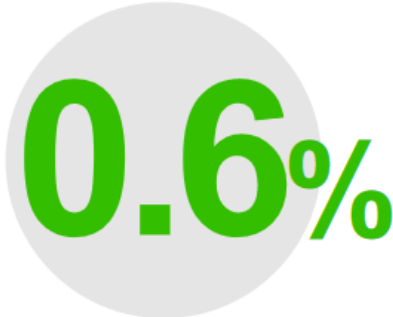
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**Warm Direct Mail  
average response  
rate**



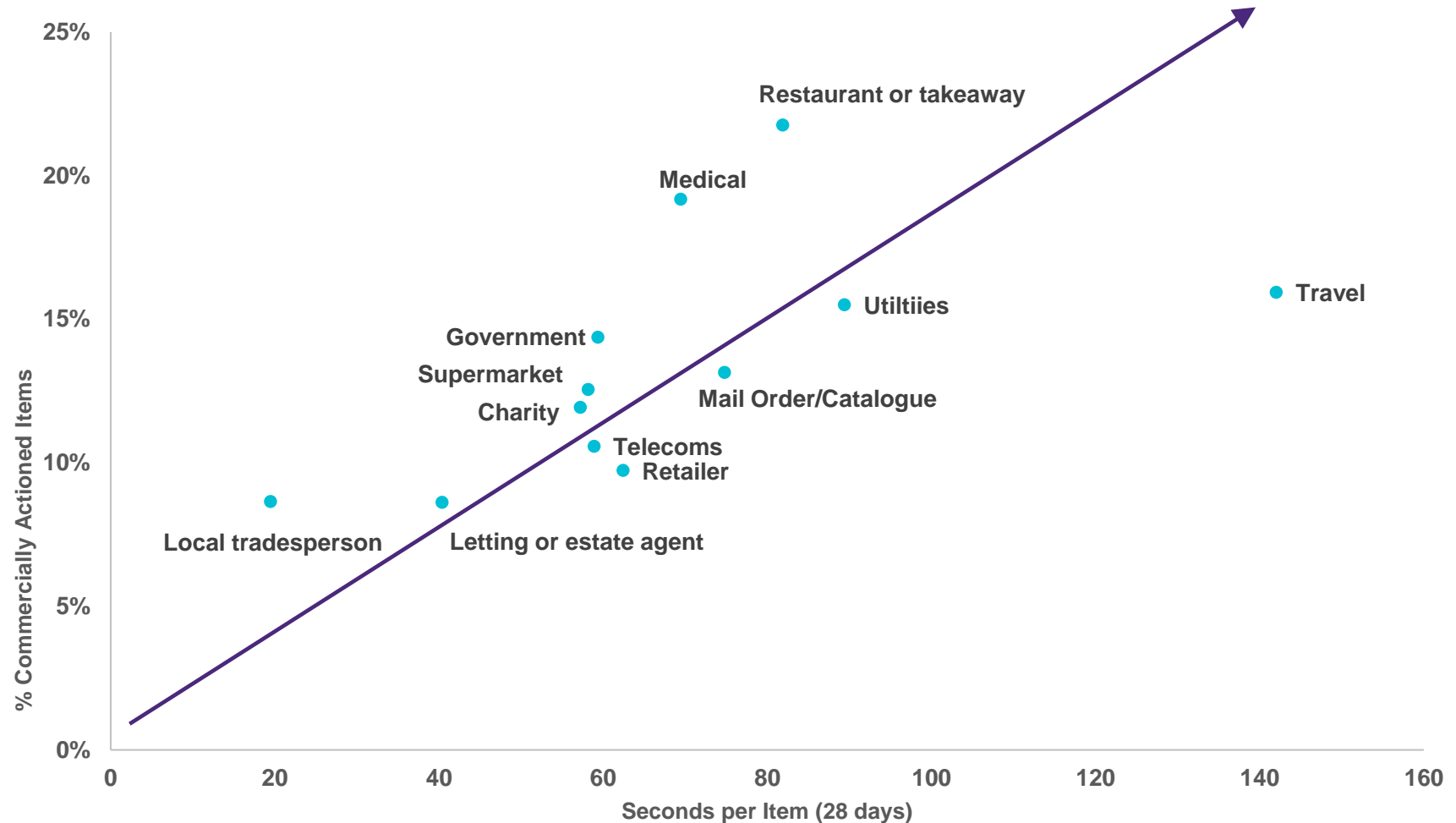
**Cold Direct Mail  
average response  
rate**



**Door Drops average  
response rate**

# Strong linear relationship between Door Drop attention and effectiveness

### Door Drops Attention vs Effectiveness by sector Q3 2024





Mail Effectiveness Q3 2024

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# Commercial Actions

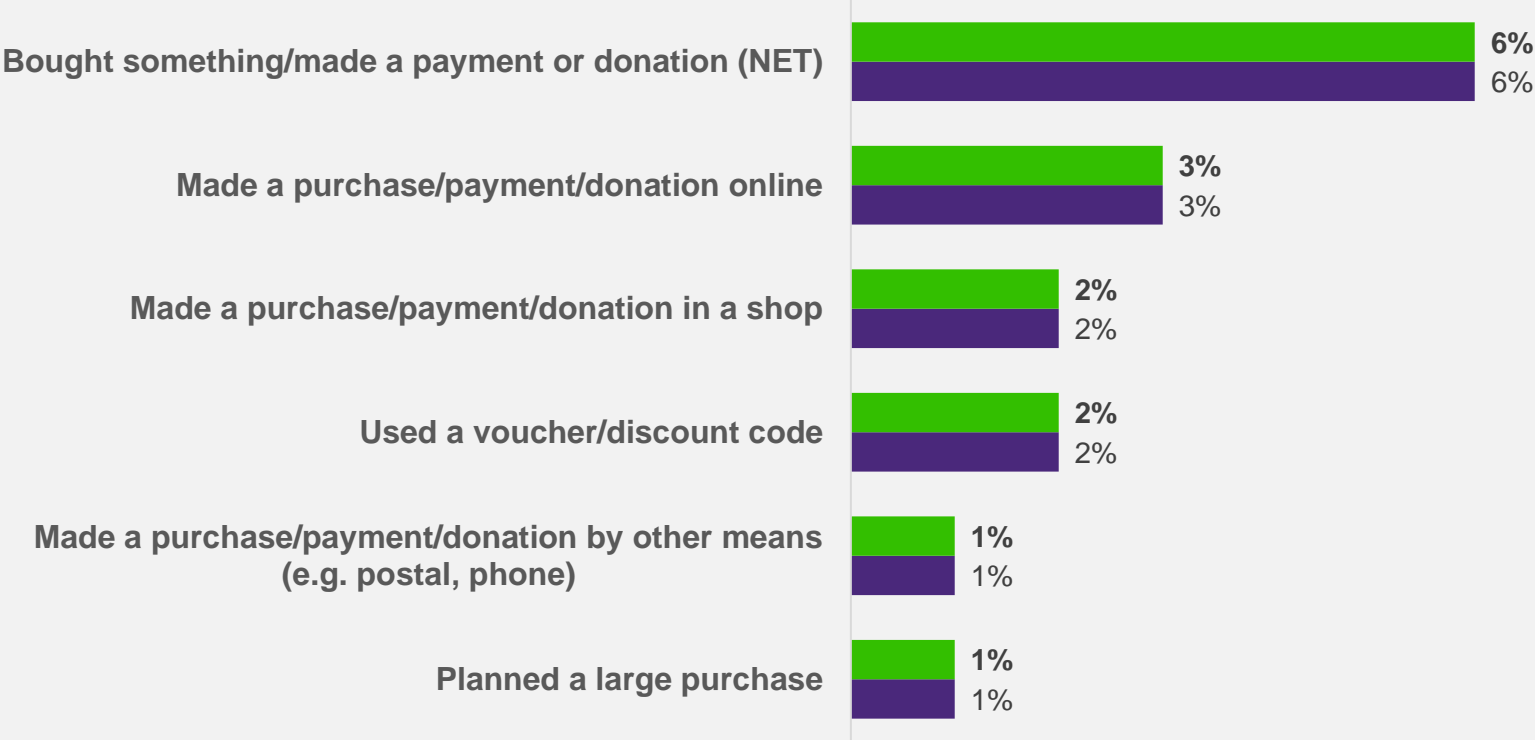


Mail Media Metrics

# 6% of mail prompted a purchased in Q3 2024

Purchase related commercial actions

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



■ Q3 2024 ■ Q3 2023

Source: JICMAIL Item Data Q3 2023 n=10,141 mail items; Q3 2024 n=10,669 mail items

# 15% of mail prompted a conversation

Customer Engagement  
and Brand Discovery

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



Source: JICMAIL Item Data Q3 2023 n=10,141 mail items; Q3 2024 n=10,669 mail items

Mail Sector Performance Q3 2024

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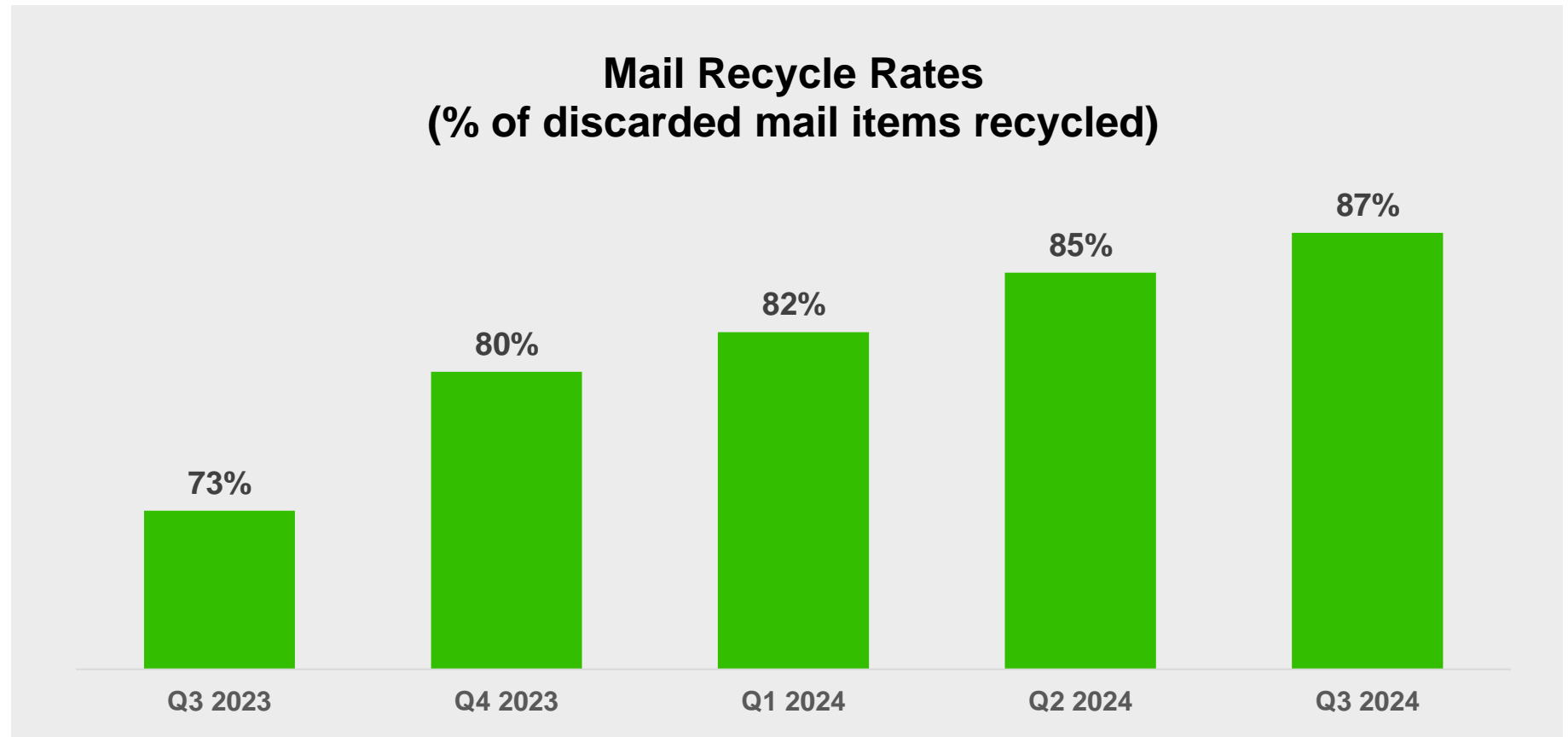
# New Data Points One Year On



Mail Media Metrics

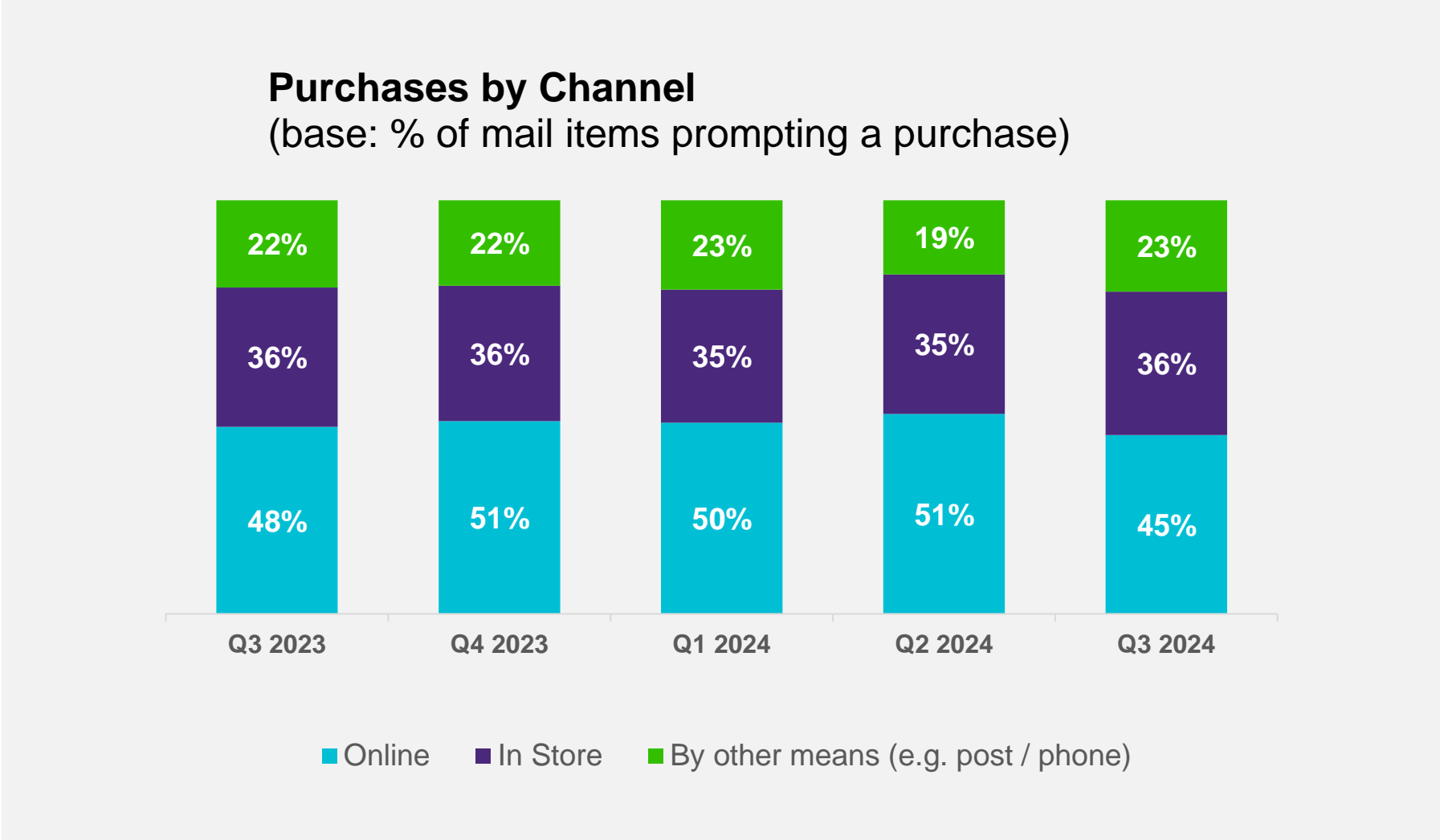
# Mail recycle rates have grown +14% in just 12 months

In Q3 2023 JICMAIL introduced a raft of changes to the diary app in order to generate additional insight across a number of mail and household profile points. With five quarters of data now available, year on year trends can start to be observed.



# Online purchases are the most common fulfilment channel

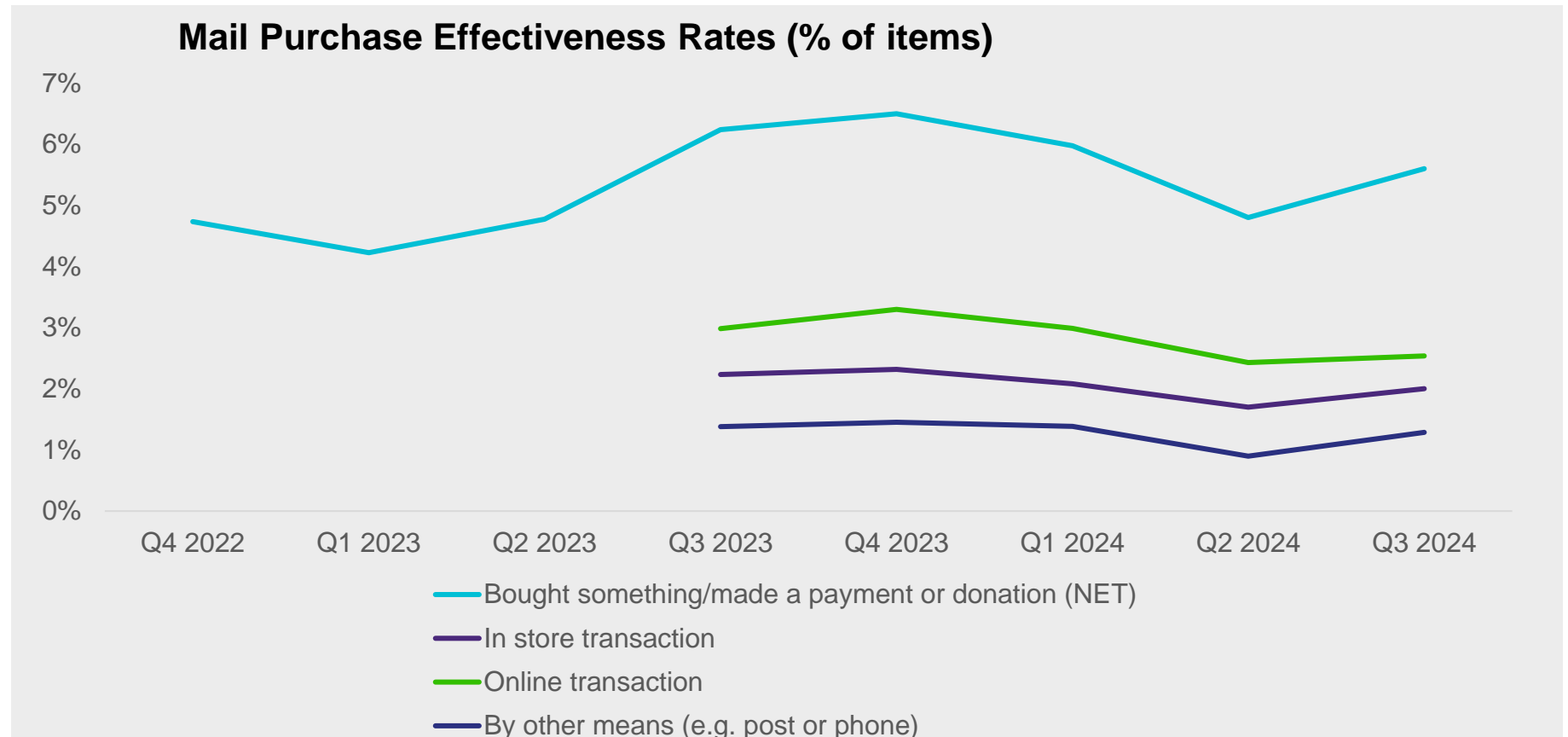
Despite the dominance of online, share has dipped slightly in Q3 2024: to 45% of purchase-driving items vs 51% in the previous quarter.



Source: JICMAIL Item Data Q3 2023 to Q3 2024 n=52,806 mail items

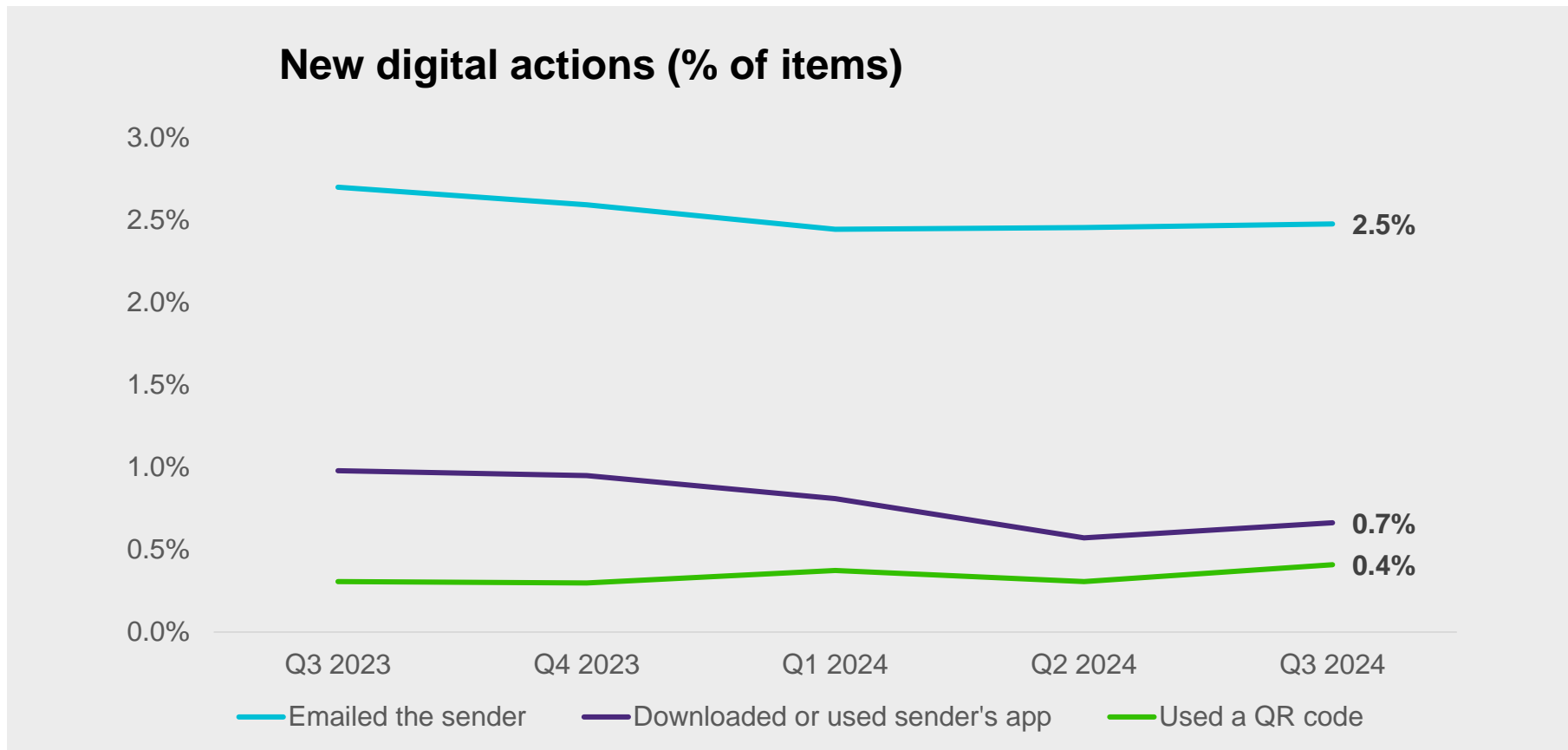
# A bump in purchase effectiveness noted from Q3 2023

By asking panellists to think more explicitly about the channel of purchase fulfilment, a broader and more robust view on purchase activity driven by mail is now available.



# Emails prompted by mail are the most commonly occurring new digital effectiveness metric

App downloads and QR code scans are typically happening at a much lower level, with the former even dipping over the last five quarters.



Source: JICMAIL Item Data Q3 2023 to Q3 2024 n=52,806 mail items



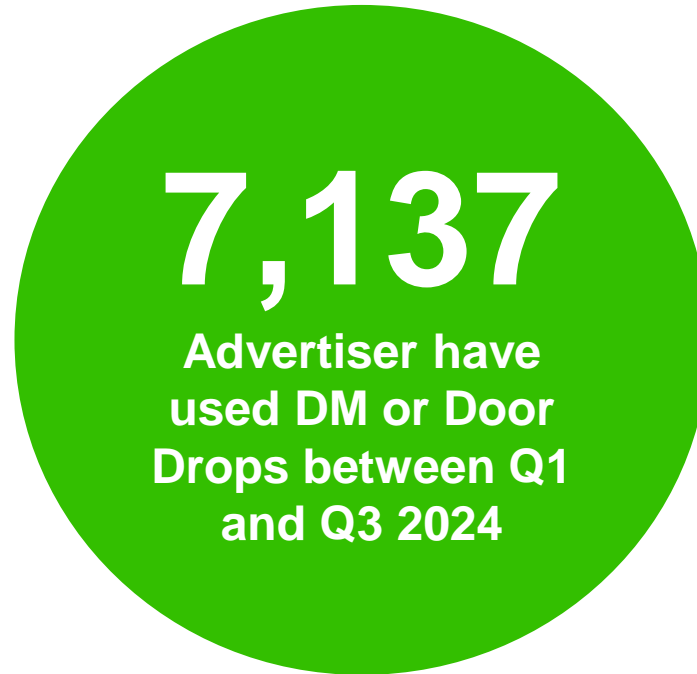
Advertiser Activity Q3 2024

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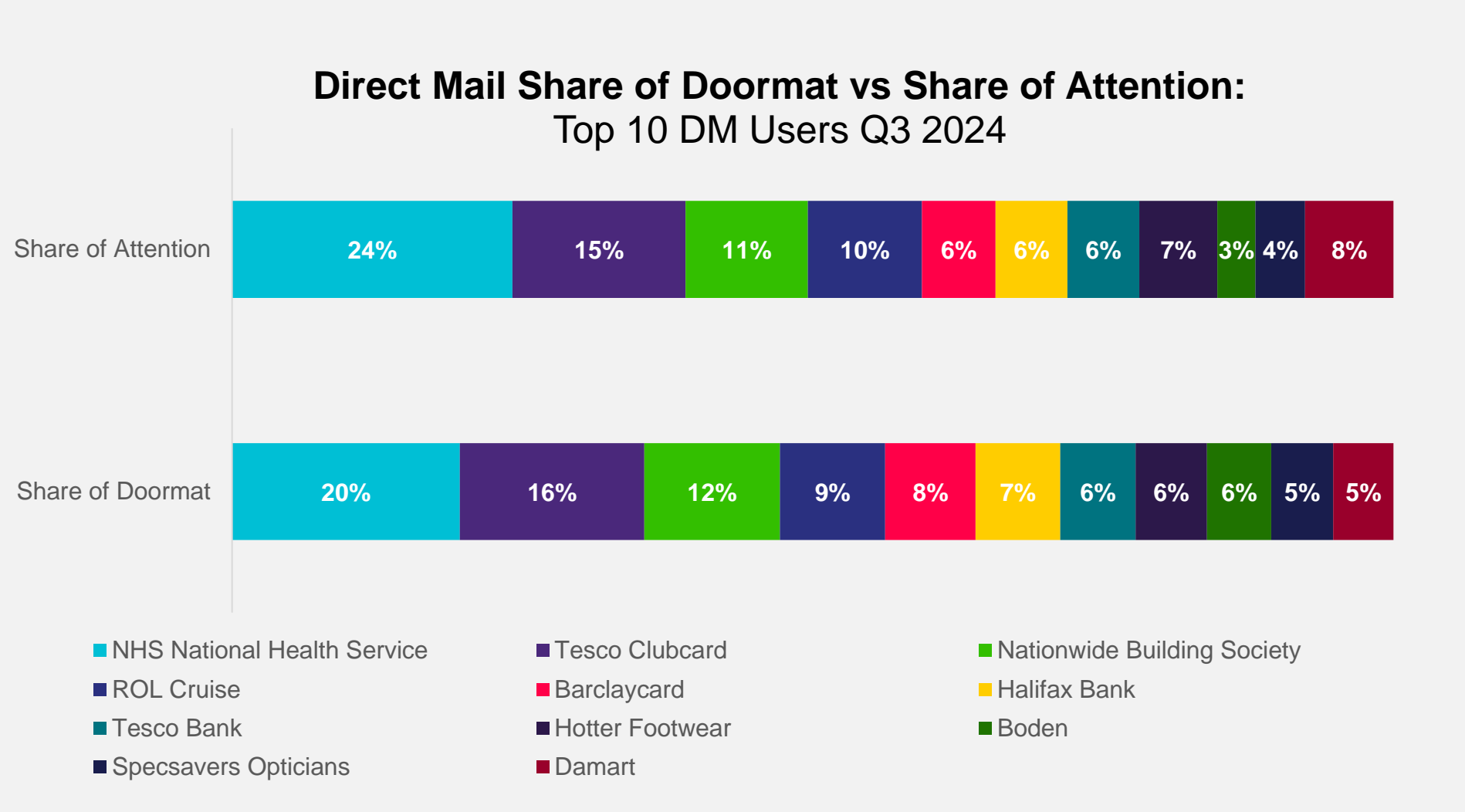
# Share of Doormat and Attention



Mail Media Metrics

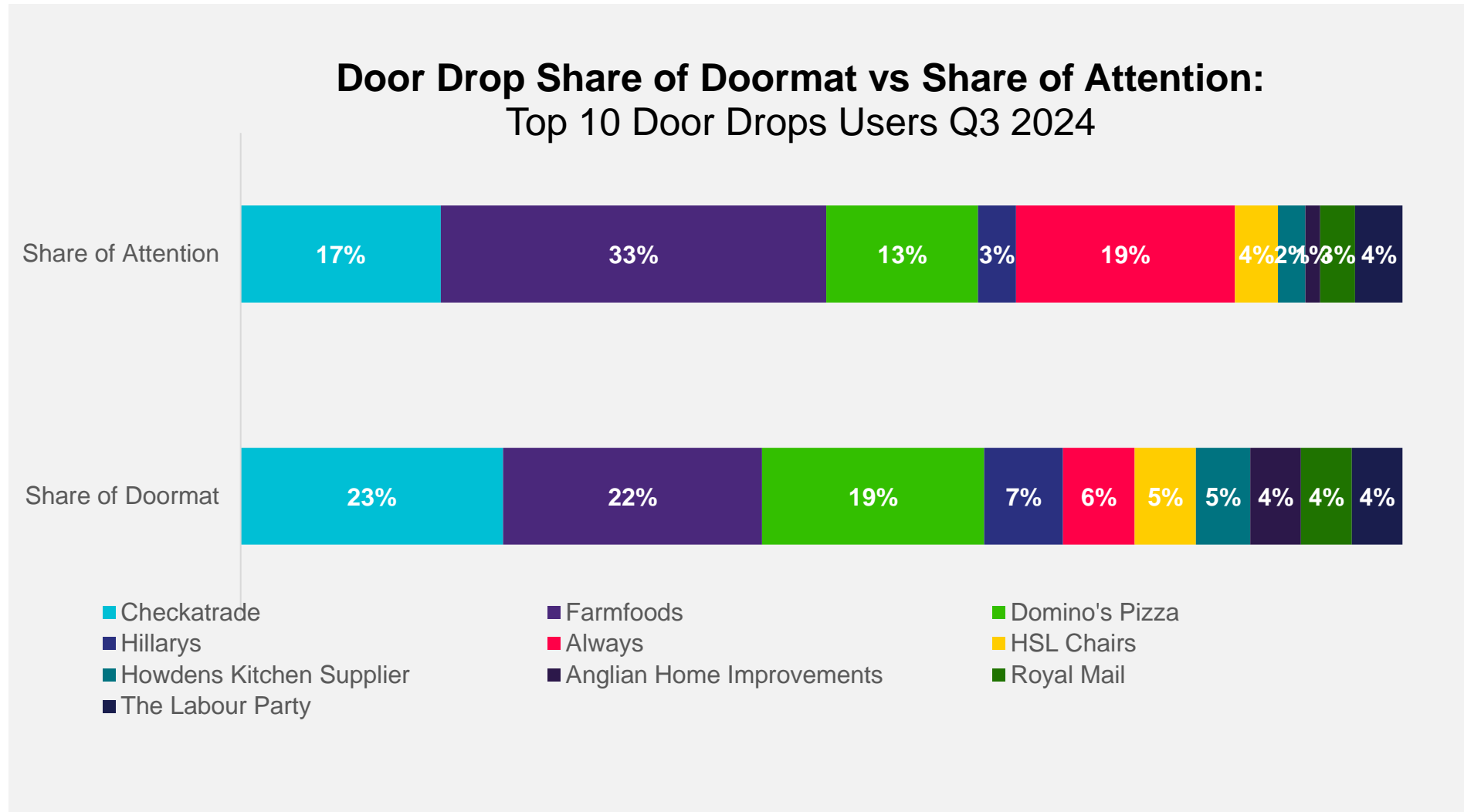


# NHS, Damart and Hotter Footwear over-performing for attention

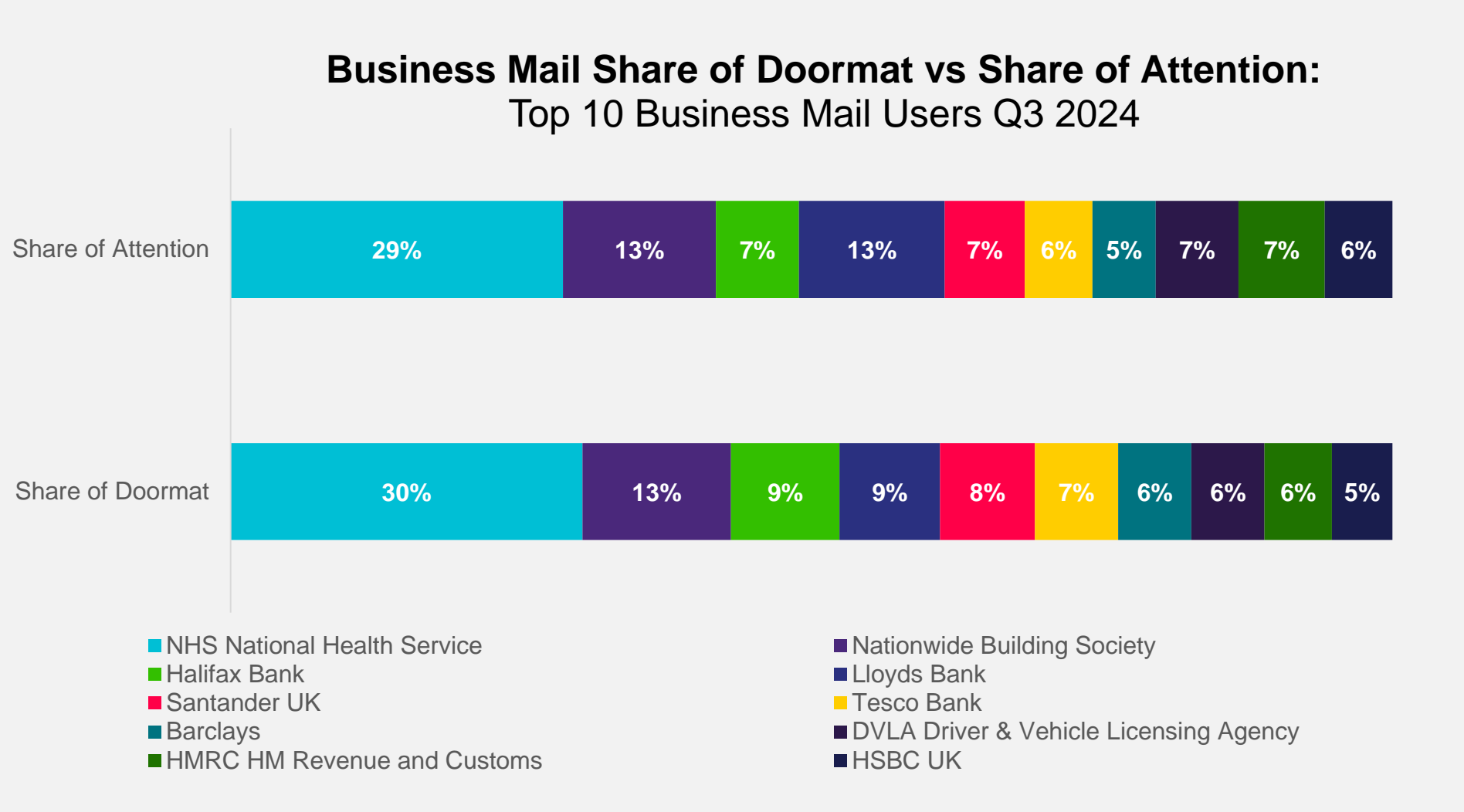


Source: JICMAIL Advertiser Attribution Data Q3 2024

# P&G Always Door Drop sampling activity recorded x3 share of attention vs volumes



# Lloyds Bank Business Mail over-performing for attention



Source: JICMAIL Advertiser Attribution Data Q3 2024

1.

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## Engagement and Effectiveness

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3.

## New reporting variables one year on

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6% of all mail drives a purchase – most commonly online (45%) vs in store (36%).

# Thanks

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