

JICMAIL Quarterly Results

Q4 2023

The logo features the text 'JIC MAIL' in a bold, white, sans-serif font. The 'J' and 'I' are connected. The logo is positioned over a background image of a wooden bowl containing various fruits like bananas and apples.

**JIC
MAIL**

Mail Media Metrics



Full year 2023 in numbers



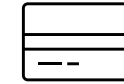
95%

of mail was engaged with
(up 1% y-on-y)



30%

of mail prompted a commercial action
(up 6% y-on-y)



5%

of mail prompted a purchase
(up 24% y-on-y)



5.2 million

seconds spent with mail across the entire JICMAIL panel



42,000

Mail items measured (304,000 running total)



1.

Mail engagement

After five straight quarters of growth, frequency of mail interaction stabilised at 4.17 interactions in Q4 2023. However, increases were still noted in the proportion of mail passed on to others and filed away in the home.



2.

Mail effectiveness

Mail effectiveness continues to go from strength to strength with website visits, purchases and discussions prompted by mail all increasing year on year. Purchases driven by mail increased across all channels quarter on quarter, the largest being online: up to 3.3% from 3% last quarter.



3.

Advertiser performance

Tesco Clubcard, The NHS and Farmfoods continued to generate a disproportionately high share of attention, as did Cotton Traders in Q4. The Salvation Army, The AA and ROL Cruises have been the biggest users of cold DM in Q4.

Mail Engagement Q4 2023

Reach, Frequency, Lifespan and Attention

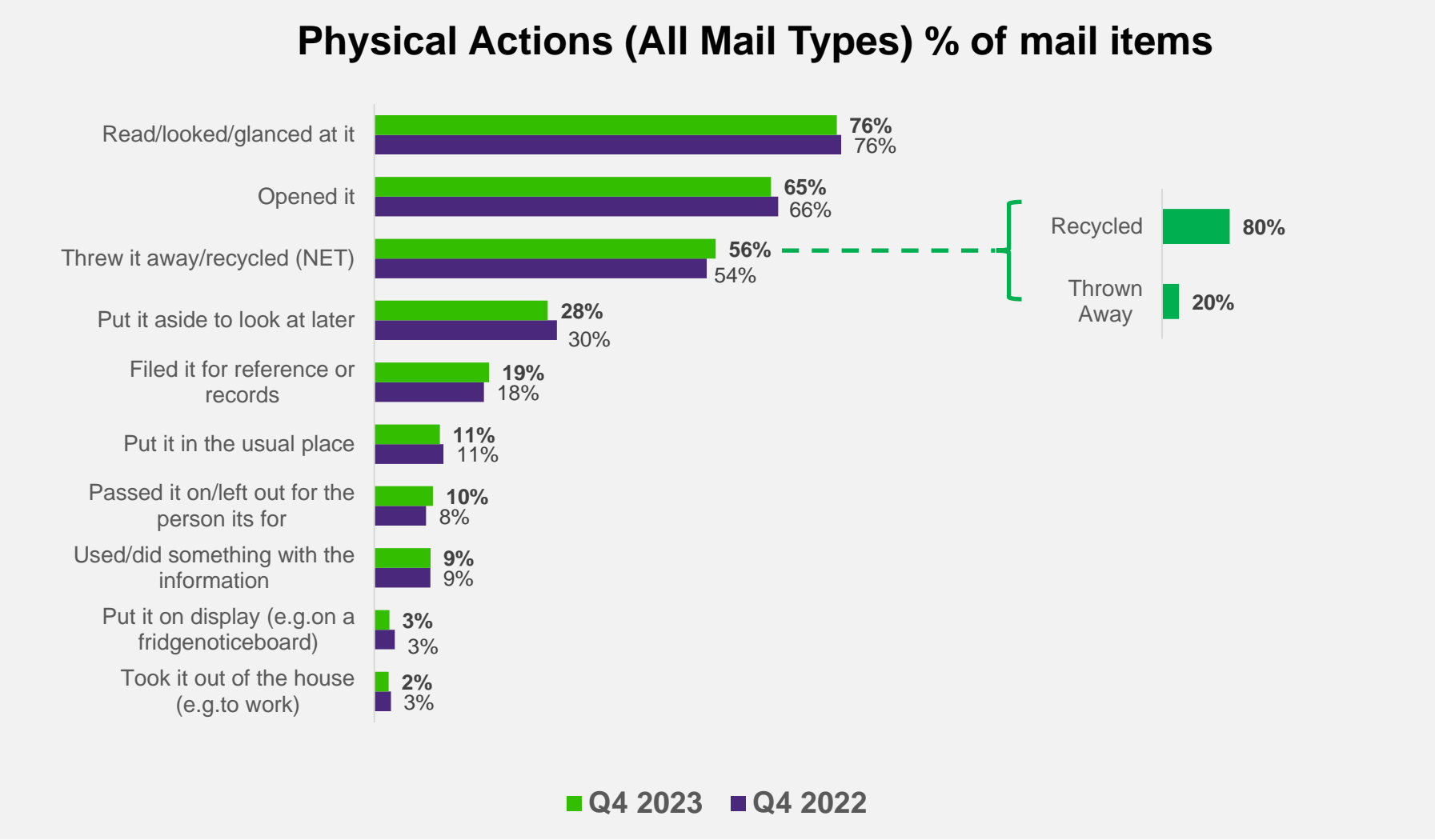


Mail Media Metrics

Mail interaction rates virtually stable year on year

Following five quarters of growth, physical interactions with mail have stabilised in Q4 2023. Marginal increases in the amount of mail passed on or filed away have been noted, while read rates remain at 76% year on year.

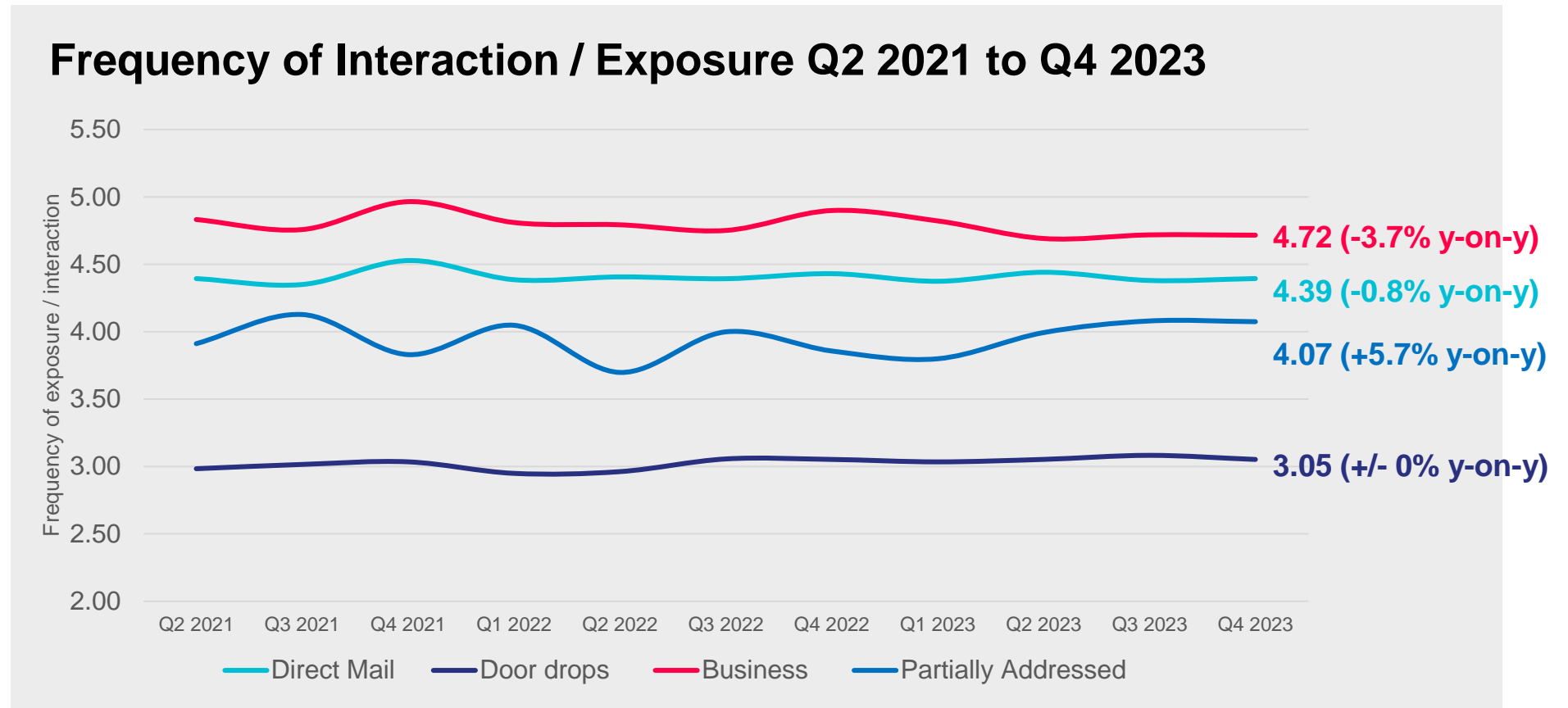
Of the mail discarded, 80% is recycled as opposed to thrown away.



Source: JICMAIL Item Data Q4 2022 n=10,395 mail items; Q4 2023 n=10,083

Frequency of interaction stable for Direct Mail and Door Drops year on year

While Business Mail frequency of interaction has declined by -3.7% year on year, Partially Addressed has increased by 5.7%.

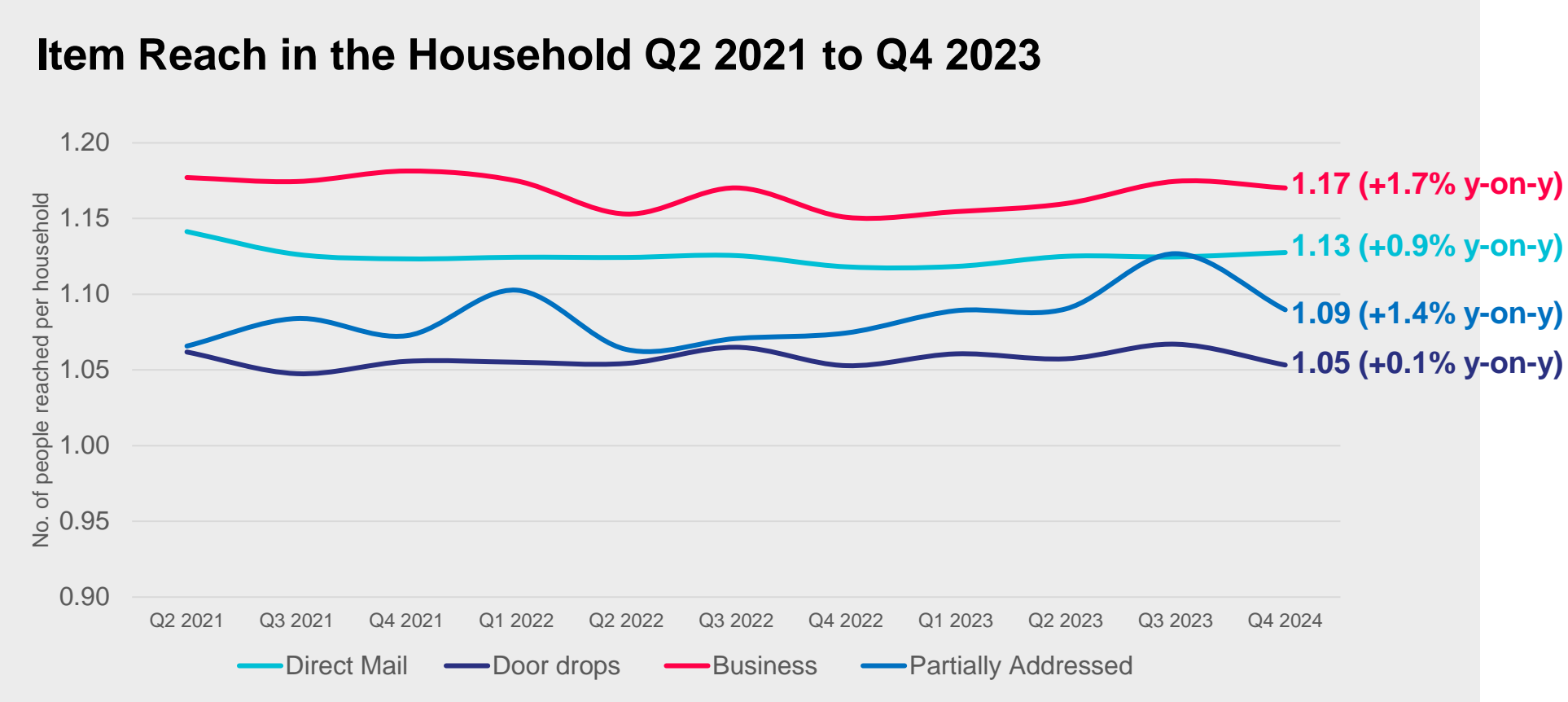


Source: JICMAIL Item Data Q1 2019 to Q4 2023 n=219,774 mail items

Mail sharing makes marginal upward swing in Q4 2023

Business Mail recorded an additional 17% reach in Q4, up 1.7% year on year, while Direct Mail recorded an additional 13% (up 0.9%).

Item Reach in the Household Q2 2021 to Q4 2023

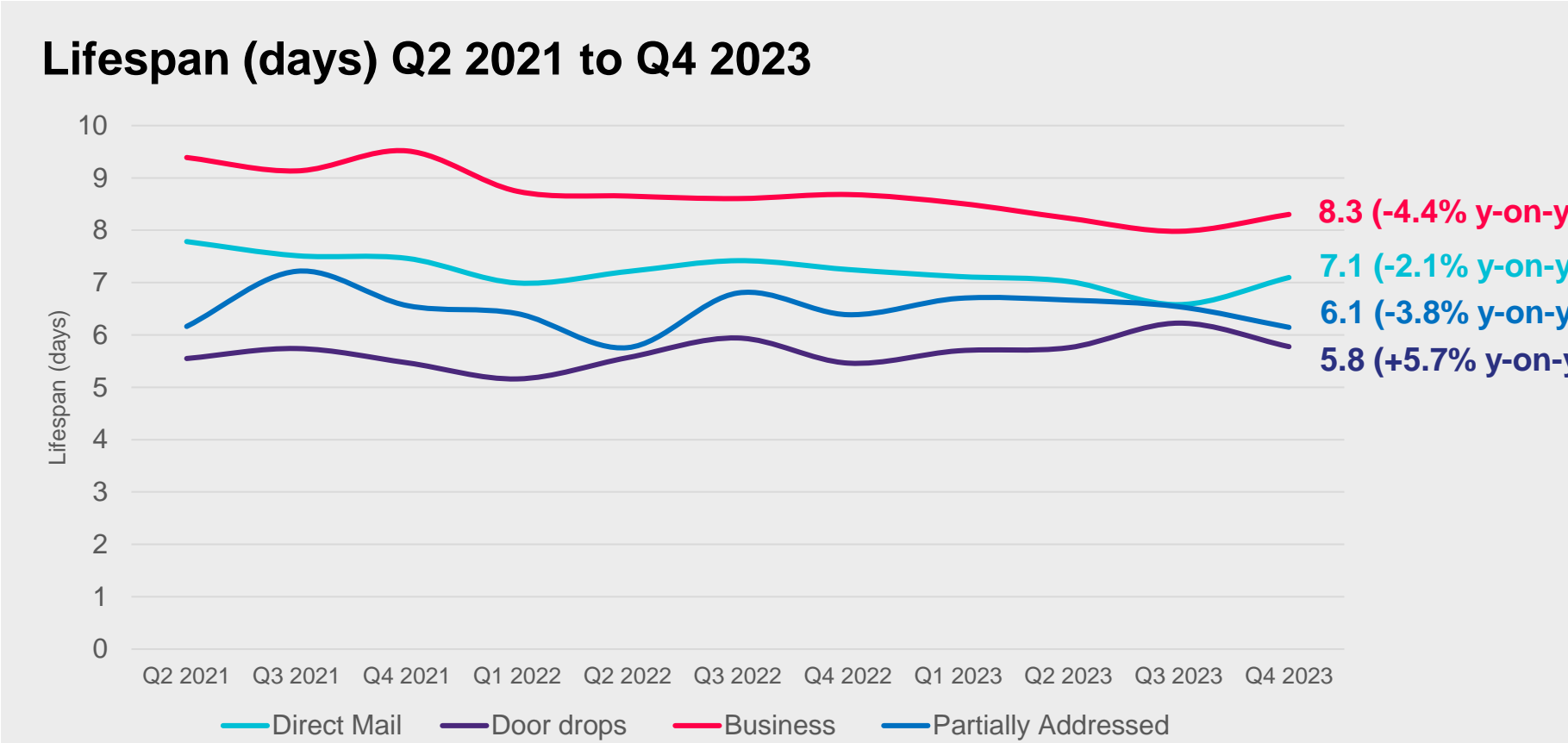


Source: JICMAIL Item Data Q1 2019 to Q4 2023 n=219,774 mail items

Door Drop lifespan increases for fifth quarter in a row

Direct Mail lifespan has declined year on year although it is again worth noting that more mail has been filed away in Q4. While not necessarily “active”, this mail is still present in the home although no longer contributing to lifespan calculations.

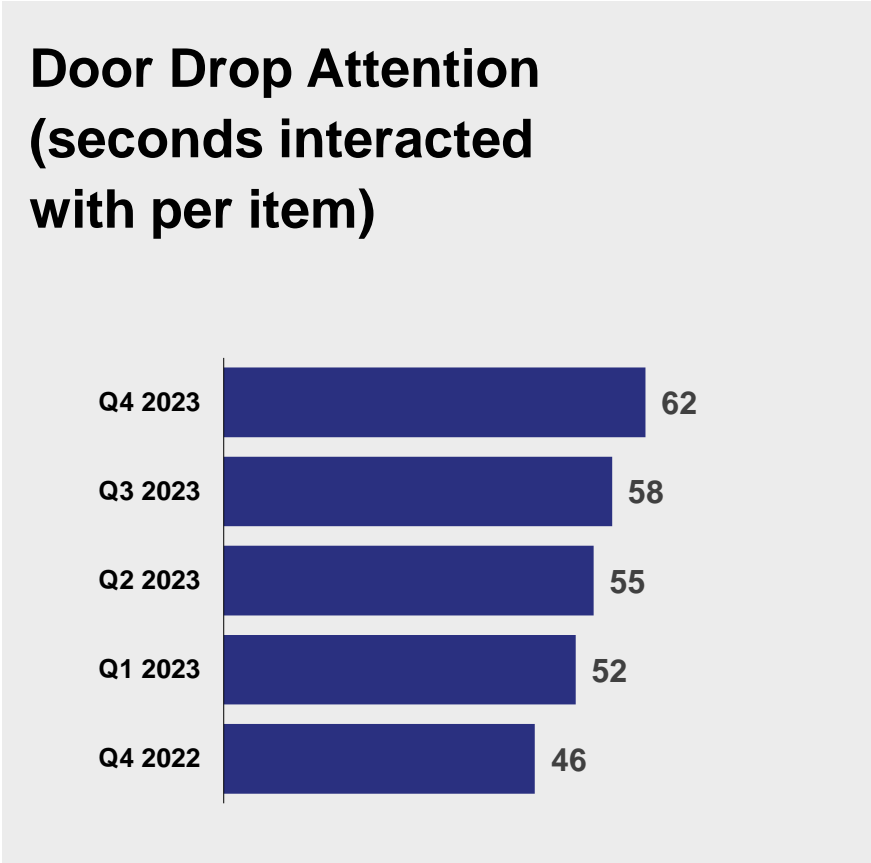
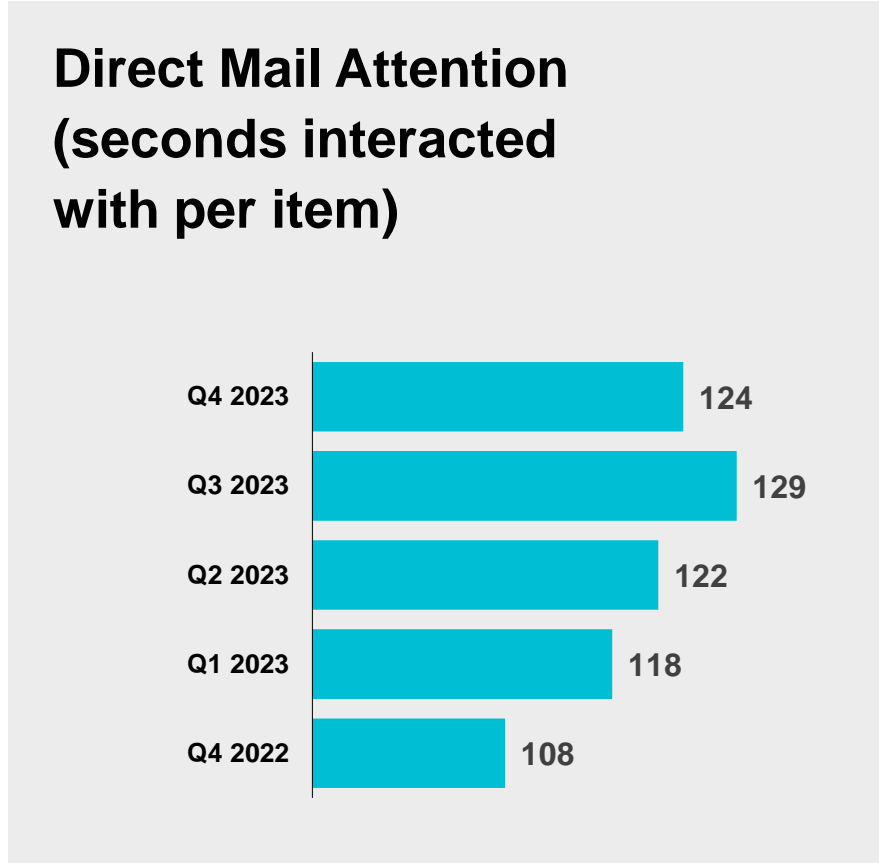
Lifespan (days) Q2 2021 to Q4 2023



Source: JICMAIL Item Data Q1 2019 to Q4 2023 n=219,774 mail items

The average Direct Mail item is engaged with for over two minutes across 28 Days vs one minute for Door Drops

Direct Mail and Door Drop attention is up year-on-year, but has stabilised on a quarter-on-quarter basis

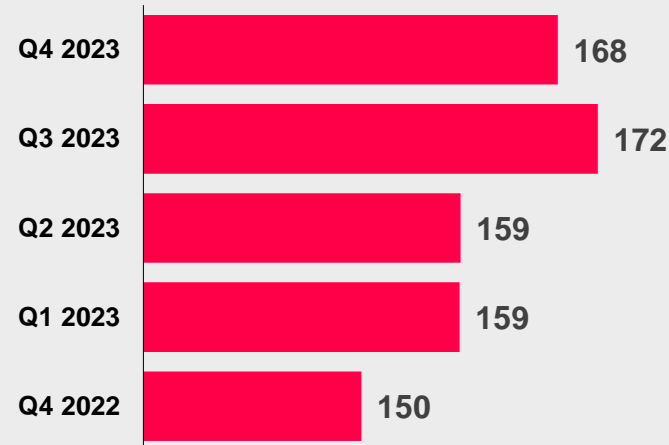


Source: JICMAIL Item Data Q1 2019 to Q4 2023 n=219,774 mail items

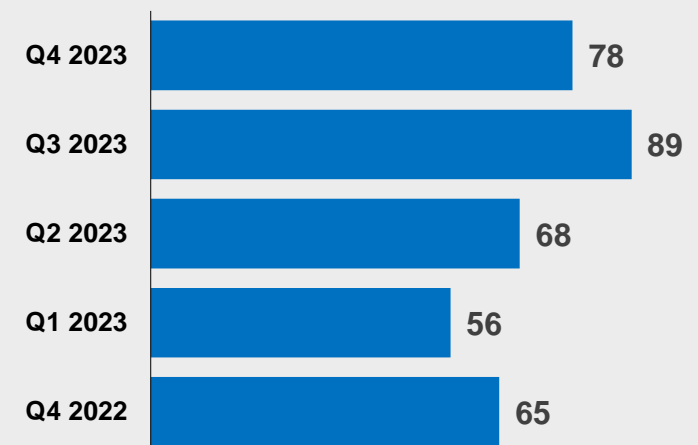
Business Mail and Partially Addressed attention up year on-year

Again, while growing year-on-year, attention has stabilised on a quarterly basis.

Business Mail Attention (seconds interacted with per item)



Partially Addressed Mail Attention (seconds interacted with per item)



Mail Effectiveness Q4 2023

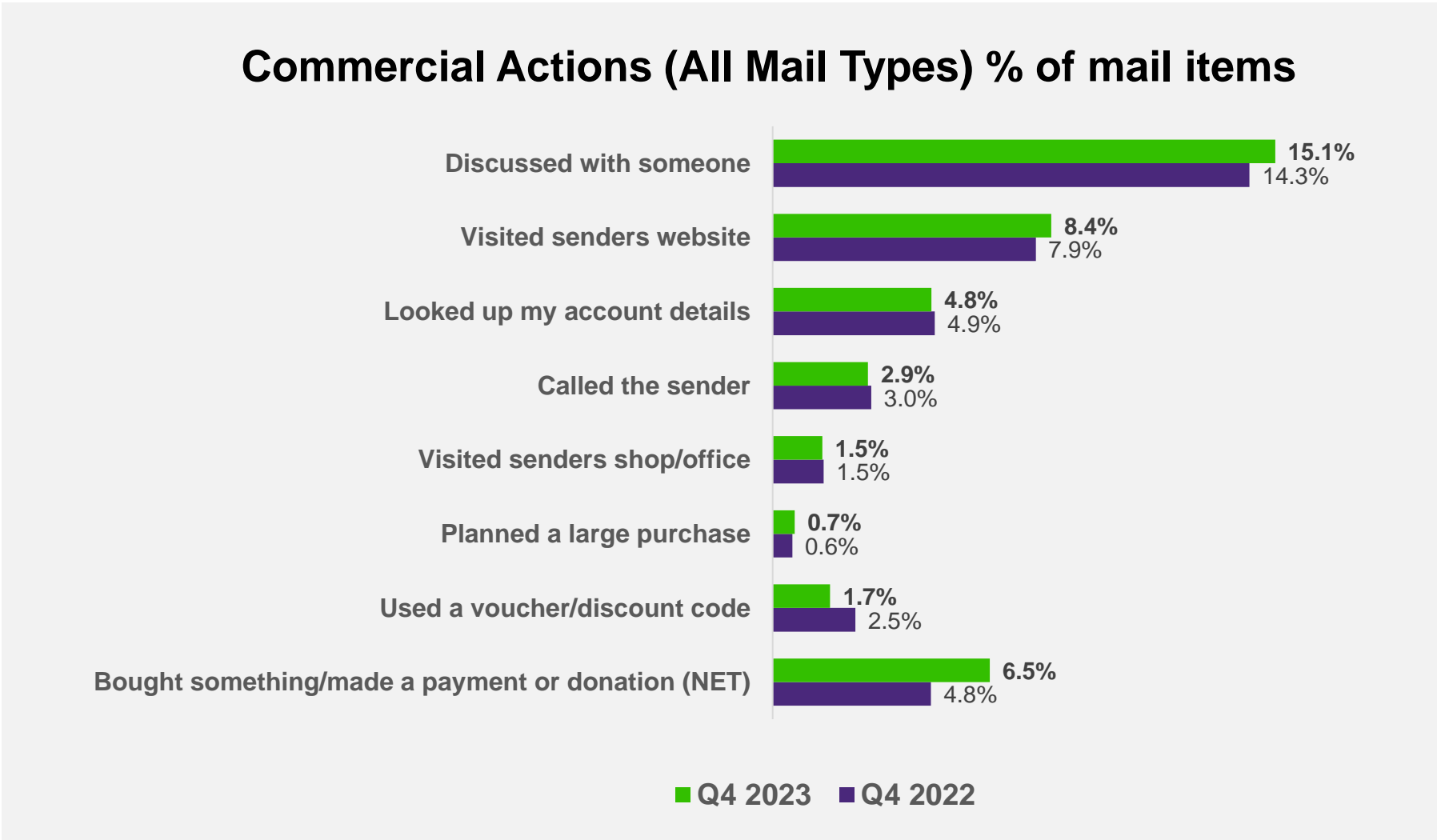
Commercial Actions



Mail Media Metrics

Website visits, purchases and discussions prompted by mail have all increased in Q4 2023

Brand Discovery {
Customer Engagement {
Purchase {

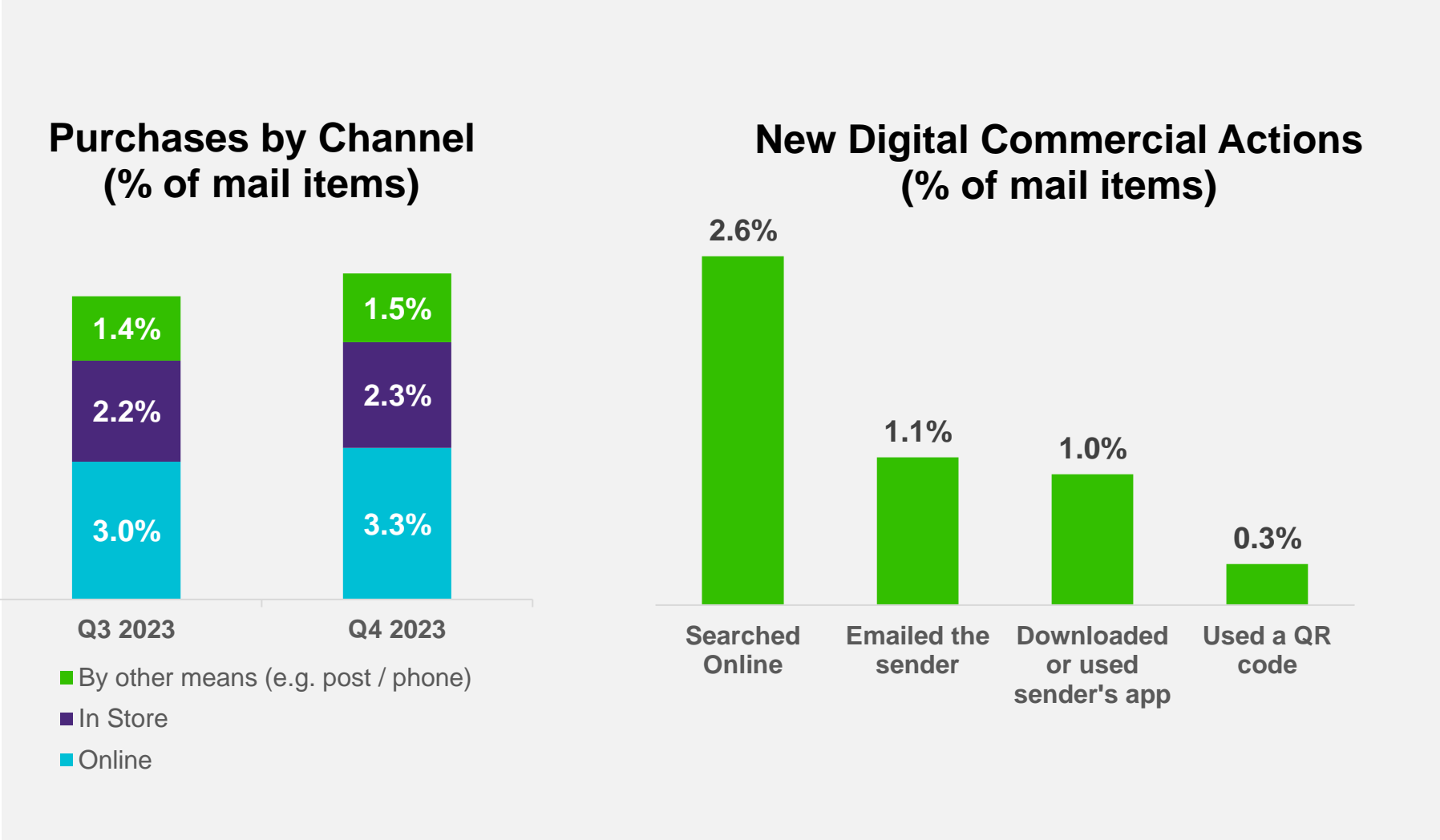


Source: JICMAIL Item Data Q4 2022 n=10,395 mail items; Q4 2023 n=10,083

Purchases across all channels have increased in Q4 2023

Online purchases grew by the greatest margin quarter-on-quarter: up from 3.0% of mail items to 3.3%.

Mail continues to generate a range of digital engagement actions including searches, email sends, app and QR code usage.



Source: JICMAIL Item Data Q3 and Q4 2023 n=20,360

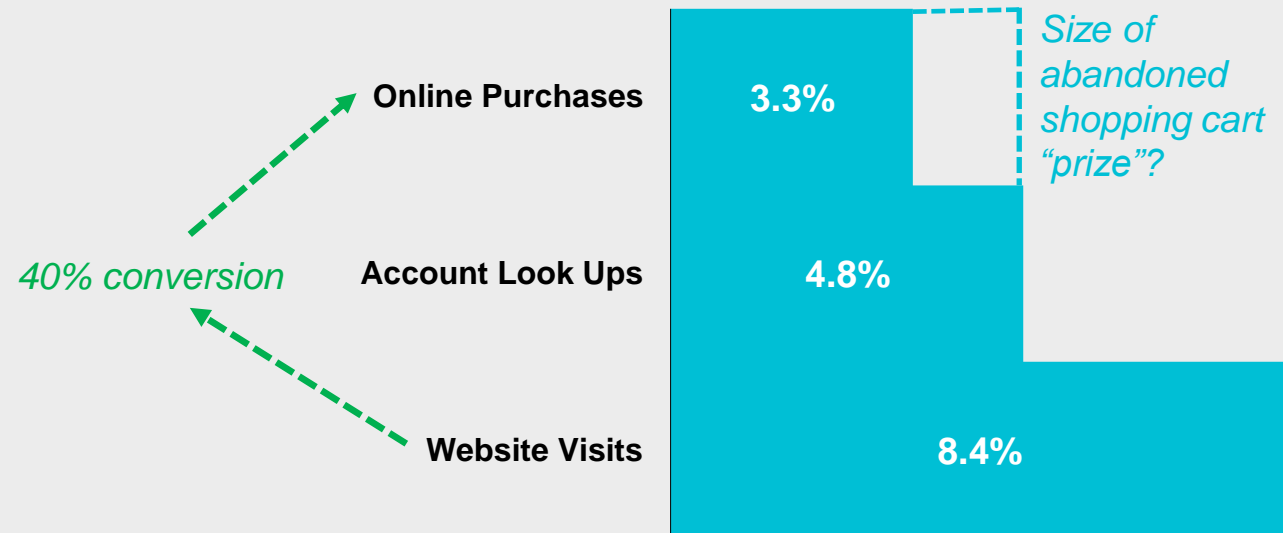
40% conversion rate from website visits

40% of website visits prompted by mail convert into an online purchase.

However, there is a 1.5% gap between the proportion of mail prompting account look ups vs an online purchase.

This demonstrates the maximum potential of abandoned online shopping carts – a gap which solutions such as programmatic mail are adept at filling.

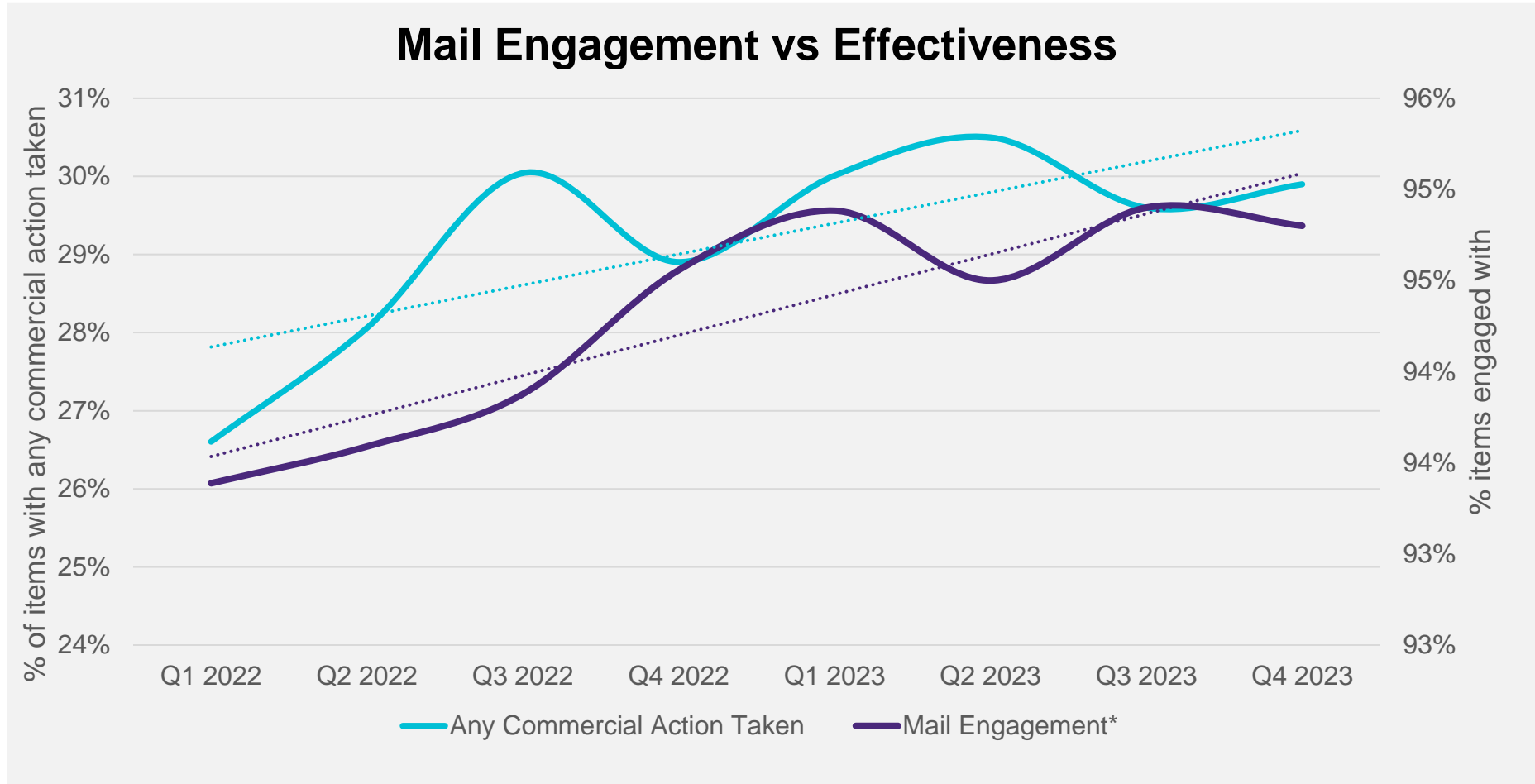
Digital path to purchase actions (% of mail items)



Mail Media Metrics

Mail engagement and effectiveness on a long-term upward trend

95% of mail had some sort of physical action taken with it, other than being immediately discarded. 30% of mail prompts a commercial action.



Source: JICMAIL Item Data Q1 2022 to Q4 2023 n=85,537 mail items

* Engaged Mail = % of mail with any physical action taken other than being immediately thrown away



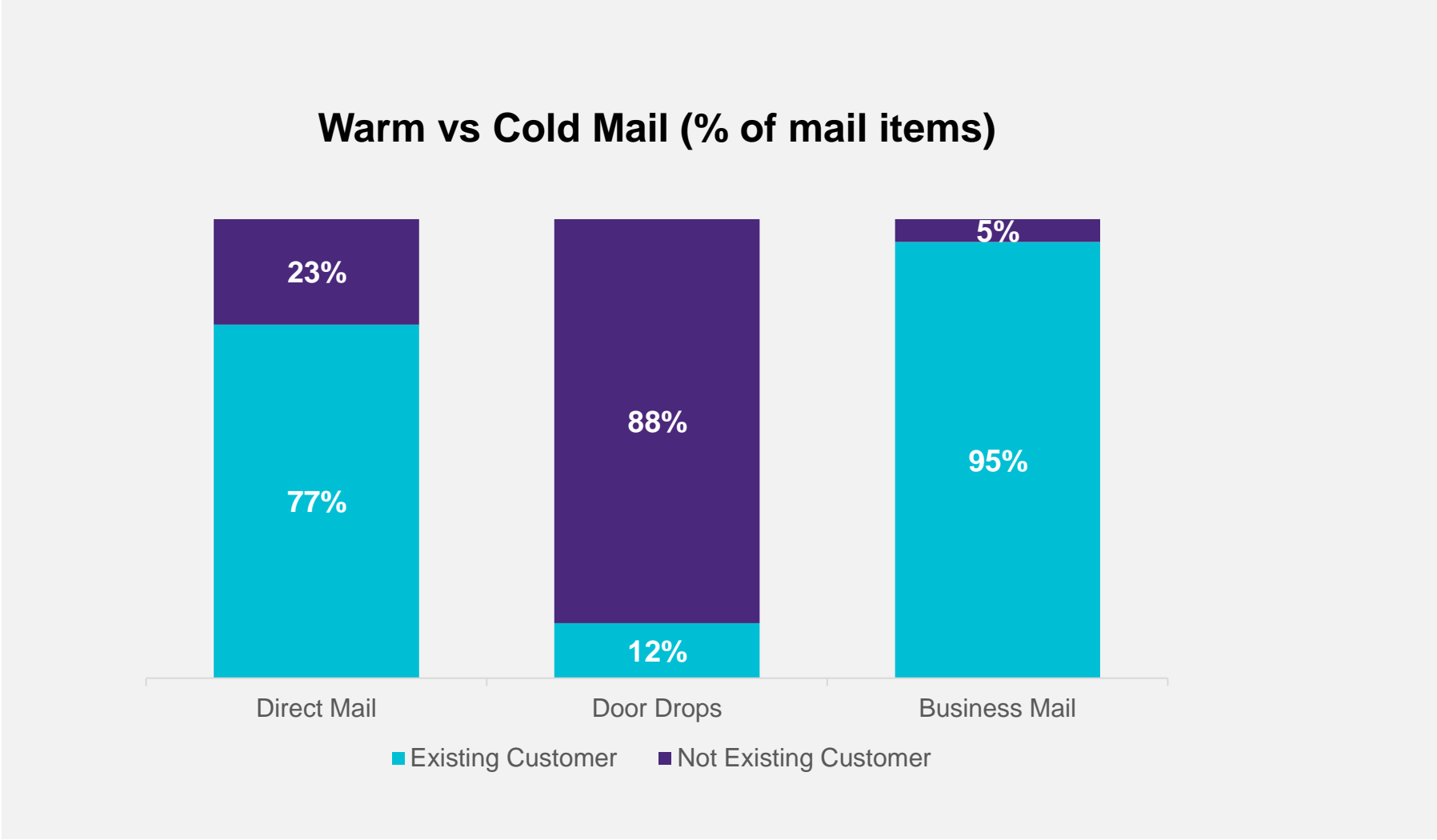
Acquisition and Retention

Cold vs Warm



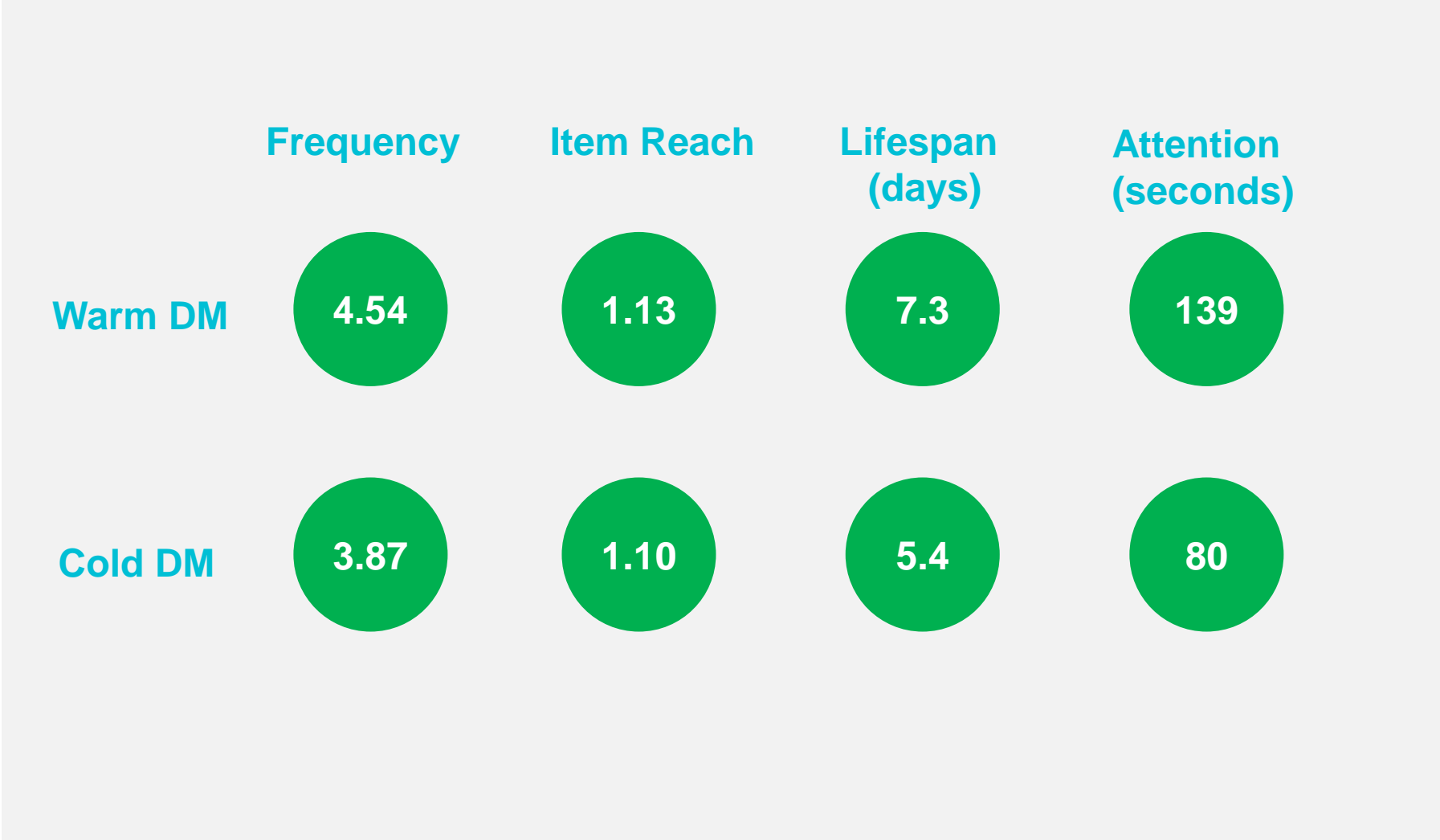
Mail Media Metrics

Over three quarters of Direct Mail is used for customer retention. 88% of Door Drops are used for customer acquisition



Source: JICMAIL Item Data Q3 and Q4 2023 n=20,360

Warm DM has higher engagement benchmarks than cold



Source: JICMAIL Item Data Q3 and Q4 2023 n=20,360

Top users of cold acquisition Direct Mail in Q4 2023



72%
Cold DM



63%
Cold DM



45%
Cold DM

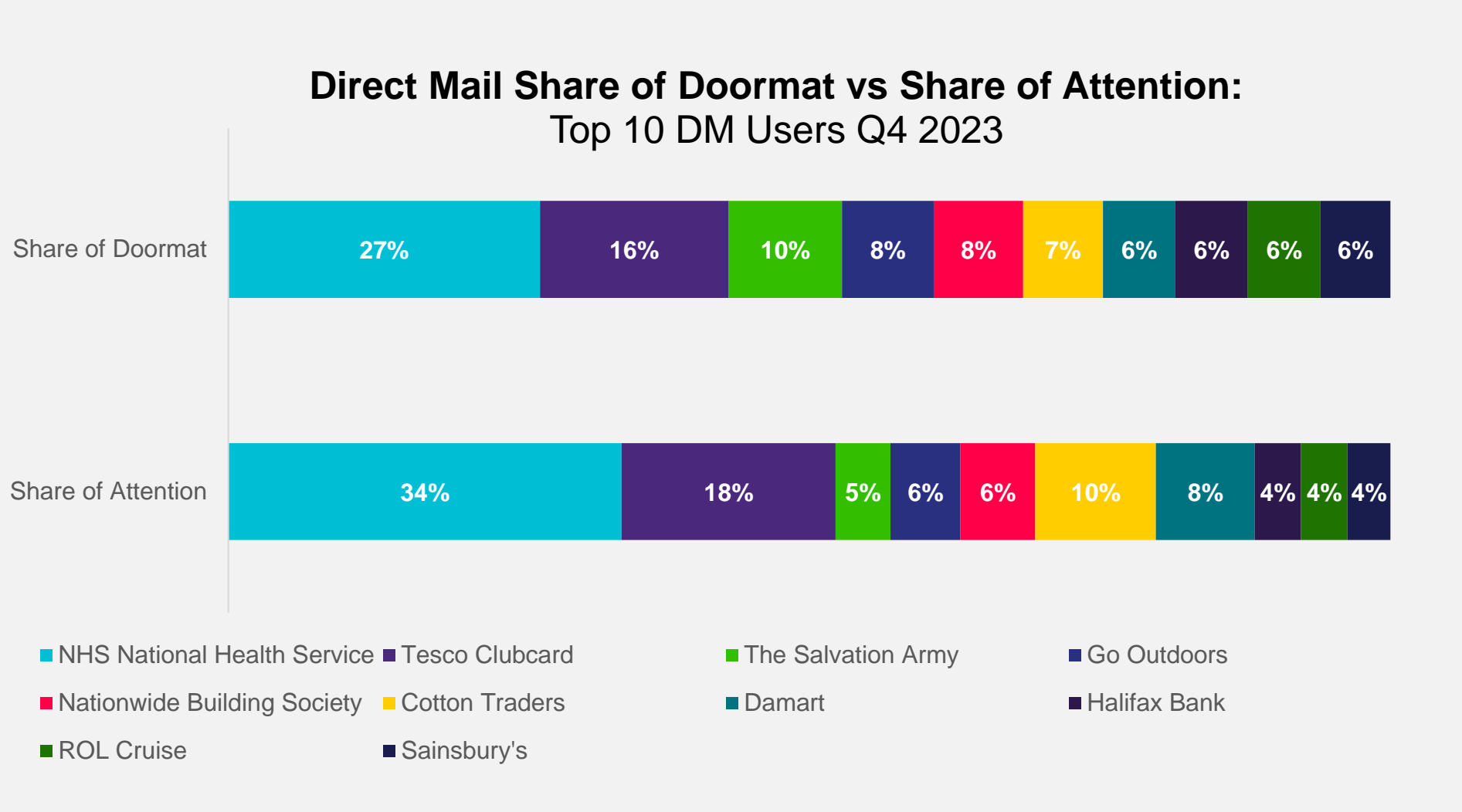
Advertiser Activity Q4 2023

Share of Doormat and Attention



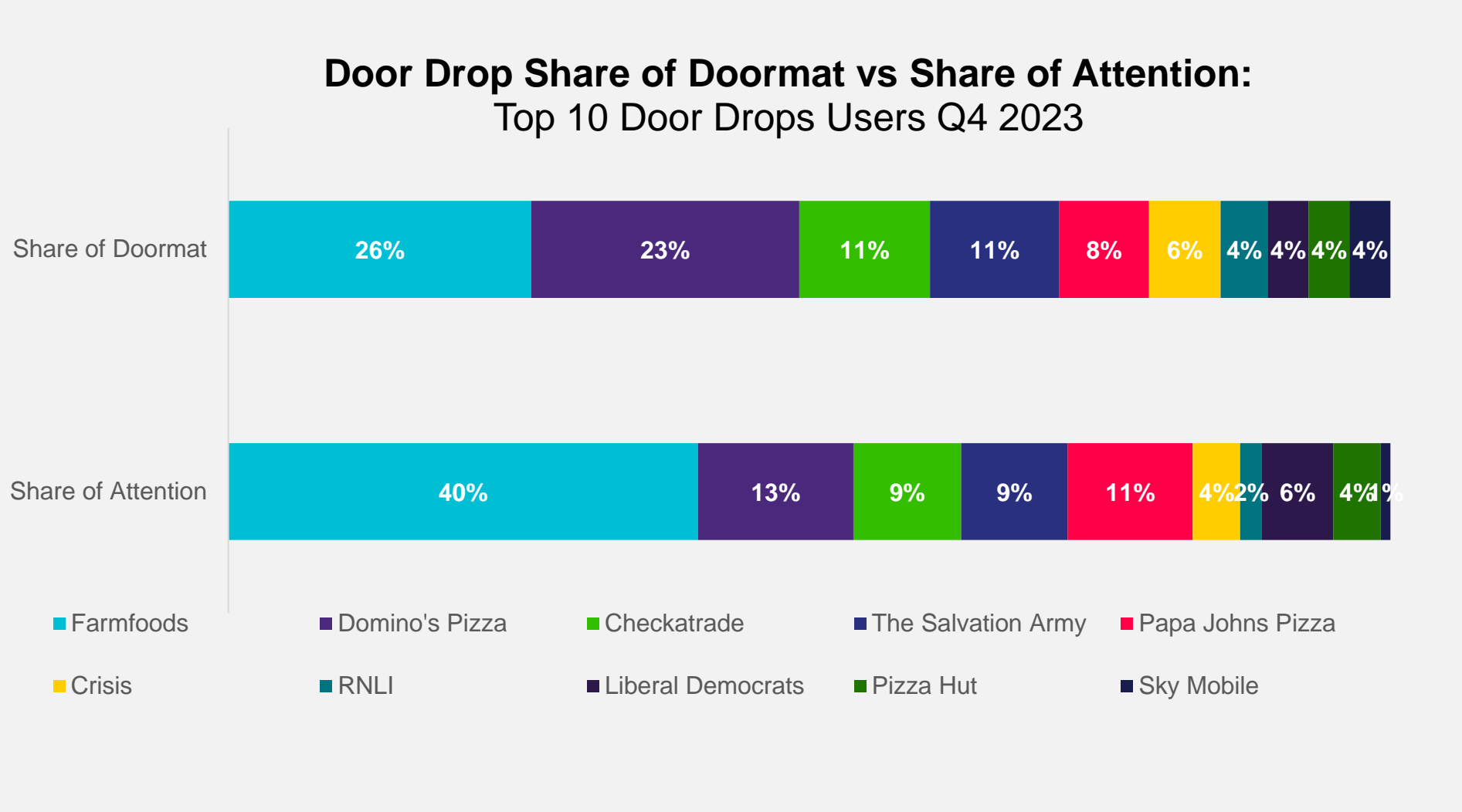
Mail Media Metrics

NHS, Tesco and Cotton Traders outperform in terms of mail attention in Q4 2023

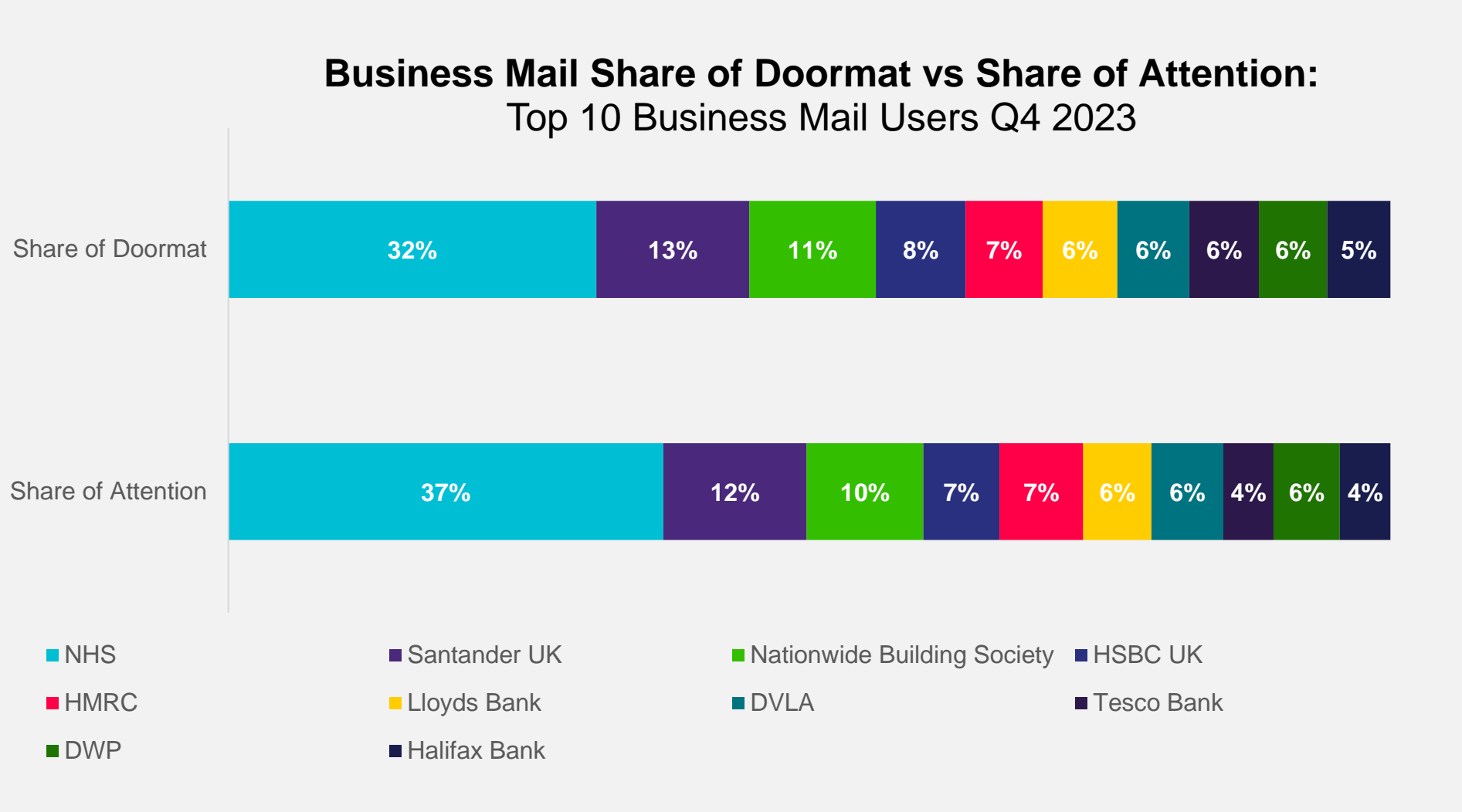


Source: JICMAIL Advertiser Attribution Data Q4 2023

Farmfoods Door Drops again command a disproportionately high share of audience attention



NHS tops Business Mail share of doormat and share of attention rankings



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Thanks

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