JICMAIL

Mail Media Metrics

A new currency for mail

18.1.18

Contents

An introducion to JICMAIL

"Our intention is to move mail from being a 'special child' that is dealt with on its own by clients, and to put it on desk tops of media planners and buyers."

For my sins I have been a media man for more than thirty years. My first ten years were spent planning and buying "above the line media" – television, radio, newspapers and the like. I grew up using their planning and buying currencies as everyday tools to help me understand how best to deploy my clients' investments. In the early nineties I discovered the world of direct marketing, and direct mail. Whilst the commercial value of this channel was obvious to its inner circle of talented practitioners, I was never able to explain its role as a media channel to my fellow media directors.

Fast forward twenty-five years and as Chair of the DMA Advertising Mail Council I was able to revisit this conundrum with members of the Council. As a team we started a conversation about why mail wasn't measured, reported on and governed as all other media channels are. We all knew on the Council, as practitioners of mail, that the medium was woefully under-represented by the metrics of pure direct response. Essentially we were counting each letter as a single impact – an item that is viewed once and once only. Logic and plain common sense said that this couldn't be right. So we embarked on a journey to bring the industry together and to establish how mail is read and used each day in homes across the land. And to do so under the auspices of proper industry governance – within a JIC representing both buy and sell sides of the industry.

So I'm delighted that JICMAIL is launching because for the first time we are normalising mail as a media channel. We have created the readership, coverage and frequency, and exposure data that brings it in line with every other major UK media channel.

Mail Media Metrics give us exactly the same data as we have for television, as we have for press, as we have for radio, as we have for out of home. Our intention is to move mail from being a "special child" that is dealt with on its own by clients, and to put it on desk tops of media planners and buyers. Our intention is to bring it in line with the other £20 billion of media money that is planned every year by the media agencies, giving them access to a channel that commands attention, dwell time, respect, and drives commercial actions from consumers of all ages, classes and genders.

This is a gold standard currency that gives the ability to all planners to plan mail using the same tools and metrics they use for all other communications channels. This is truly a landmark moment for mail in a digital age.

Mike Colling
Founder & CEO, MC&C
and IPA Board Member of JICMAIL

Executive summary

One thing that our early findings make clear is that the reach and frequency of mail have been significantly under-reported.

Why launch a JIC for mail?

JICMAIL has been set up to provide the industry with gold standard metrics for advertising mail – which are defined as addressed items and door drops.

This means that advertising mail can now be planned using the same metrics as all other media channels, with comparable data covering reach and frequency.

How we gather the data

JICMAIL provides the same corporate governance on the collection and publishing of data as other JICs such as BARB and PAMCo.

We continuously collect that data from a panel of 1,000 households weighted for demographics, regionality and household make-up.

Respondents use an app to photograph every piece of mail they receive, reporting on what they do with that mail over the following four weeks.

In addition to continuous reporting, we also produce an Establishment Survey, similar to that provided by BARB.

One more thing

We also have additional insight that 17% of all addressed mail and door drops lead to a commercial action.

This isn't reported within our reach and frequency metrics, but you can explore these further metrics on the JICMAIL website. They indicate that mail prompts a significant number of actions as a result of the mail piece being in the home, if not present when the recipient 'speaks to a friend' or 'goes to the sender's website'.

SOME OF THE KEY FINDINGS

65% of all addressed mail is opened. On average each item is passed on 1.2 times, and read 4.2 times by each person who receives it. Not surprisingly the more people in a household, the more a piece of mail is shared and passed on. ABC1 households tend to share mail more with each other, and C2DE households tend to re-read letters more often.

Door drops are also shared and re-read, but not to the same extent as addressed mail. For every 100 items received ten are passed on and shared, and each piece is revisited three times. Grocery, Restaurants and local Tradespeople see the highest frequency of re-reading for their door drops.

The average household receives 1.3 items of addressed mail each day.

Households with children and ABC1 households get significantly more mail.

Each household gets one door drop item for each addressed mail item – with younger and C2DE households receiving fewer door drops.

Women are 16.7% more likely than average to be exposed to addressed mail. Men are interacting with Utilities, Council and Magazine mail most frequently. Healthcare (pharmacy, optician etc.) and Supermarkets appear higher up the list for women.

How we collect
the data

In the first two quarters of data collection we surveyed 1,846 households. This nationally representative sample also comprises offline panelists who log all mail and actions continuously but via a paper based diary.

JICMAIL data is collected using a panel which is weighted to NRS.

Over each quarter JICMAIL is tracking the mail activity of around 1,000 households. Panelists record the mail they receive for a week and subsequent mail actions taken by them, or anyone in their household, for three more weeks. They then begin this process again with mail they receive the following week. Our panel is split into four groups, each starting on a different week so that we are tracking mail activity for every week of the year. Over the first two quarters of data collection we have surveyed 1,150 separate households. This nationally representative sample also comprises offline panelists who log all mail and actions continuously but via a paper based diary.

Panelist recruitment is targeted at National Readership Survey defined household demographics, and weighted to match targets where necessary. The household level dataset is then converted into an audience level dataset and factored up to and weighted to Census and Kantar TGI data for use in media industry planning tools.

We developed a methodology that reflects how mail is used by consumers

When the JICMAIL team embarked on establishing a currency for mail, we knew we had some unique challenges. Mail had never been measured in the home and we needed to find a way of helping people capture their mail and log it on an on-going basis.

So we decided to get our panelists to capture the piece of mail itself. By having a visual reference for the mail pack panelists would then be able to refer to the visual and this would help them tell us what they did with it.

Initially we set up a pilot which ran for four months so that we could tweak the approach as we went along and understand from our consumers taking part what they found easy and what they didn't.

This approach resulted in finding a methodology that allows panelists, using an app, to take a photograph of each mail pack received each day, and then they tell us what they did with each piece. The photograph of the mailing piece provides the consumer with a visual prompt for each piece of mail, making it easier to record at a glance what they've done with individual pieces.

The data is collected across a twenty-eight day period. We ask people only to record the mail delivered during the first week; to log it and tell us what they did with it immediately. That first weeks' worth of mail is then tracked by the consumer for the subsequent three weeks.

We constructed this approach based on the learning from our pilot. We saw that consumers tended to sort, distil and disseminate mail to other members of the household in the first week. In the subsequent three weeks we were more likely to see behaviour patterns dealing with mail, that is, reading, re-reading, sharing and acting upon.

Structuring the on-going panel

Just like BARB we have an annual Establishment Survey which helps us to structure the on-going panel.

At the outset of building our currency we undertook a paper based Establishment Survey to ensure our panel would be representative of a UK national population composition.

There were 2 elements to the Establishment Survey:

1. A face to face Omnibus survey to identify the drivers of mail volume.

   To establish which household / individual characteristics are most influential on mail volume (to verify any sampling approach used for the main diary panel).

2. An online survey to understand variances in mail volume throughout the week.

   To understand fluctuations of mail volume across the week, in order to validate mail volumes collected in the face to face Omnibus.

The face to face omnibus survey included:

• 2,000 interviews in Great Britain, plus 55-60 in Northern Ireland.

• Random location sampling was applied each week.

• Nationally representative of adults aged 16+ in UK (including Great Britain and Northern Ireland).

• A face to face methodology with coverage of the offline population.

The online survey consisted of:

• 500 interviews per day, for 7 days.

• This ran simultaneously to the face to face Omnibus.

• Quota sampling.

• Nationally representative, by gender, age and region (North, Midlands, South).

• Online interviews, via Kantar TNS's own panel.

The Establishment Survey confirms circulation data

As well as ensuring we create a representative panel for continuous data, the Establishment Survey allows us to cross check the circulation data provided by the mail industry and is audited by ABC.

It gives us insights into how much mail is received by different households:

• The average household receives 1.3 items of addressed mail each day.

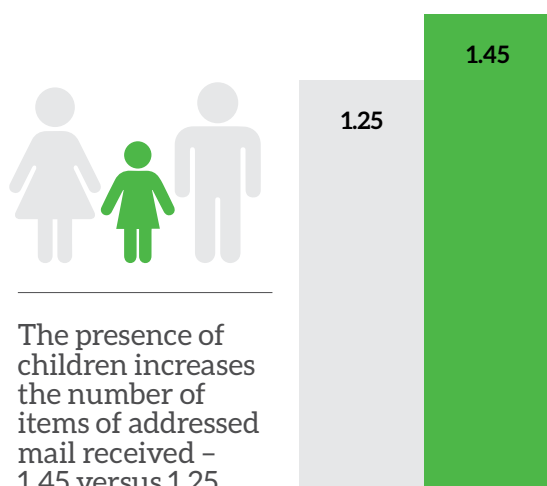**The average daily volume of addressed mail was affected by some key characteristics:**

• The presence of children increases the number of items of addressed mail received – 1.45 versus 1.25.

• ABC1s receive significantly more addressed mail than on average at 1.46.

• Age has no significant impact on the volume of mail received.
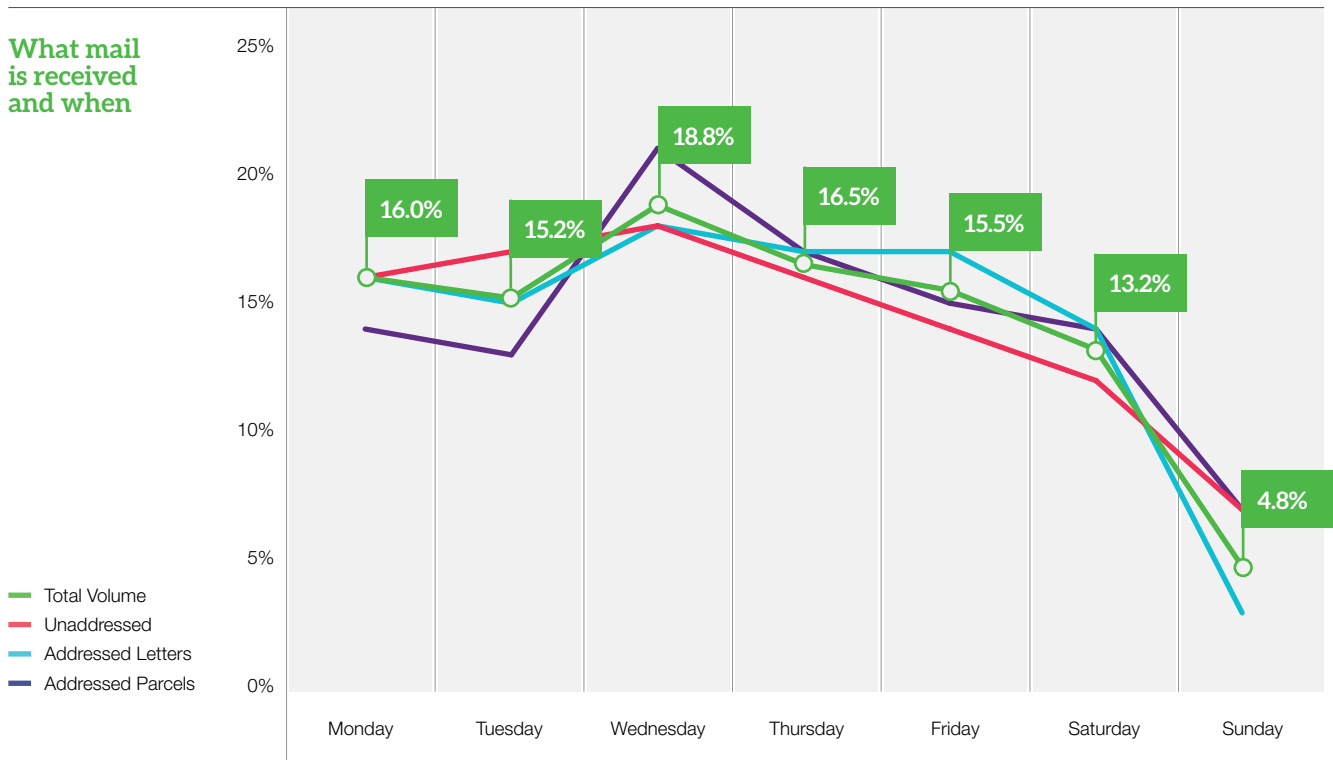
Door drops differ from addressed mail:

• The average daily volume of door drops is 0.77.

• Having children in the household does not significantly increase the number of unaddressed items received but age and social grade do.

• Younger respondents (aged 16-24) receive significantly fewer items of door drop at 0.55.

• ABC1s receive significantly more than C2s at 0.66 and DE at 0.70.

What mail is received and when:

• Mail volume remains relatively stable throughout the week, dropping off as you might expect at the weekend.

• There is also little difference by the type of mail being received.

1.25 **1.45**

The presence of children increases the number of items of addressed mail received – 1.45 versus 1.25.

What mail is received and when

Legend:
- Total Volume
- Unaddressed
- Addressed Letters
- Addressed Parcels

Data labels: Monday 16.0%, Tuesday 15.2%, Wednesday 18.8%, Thursday 16.5%, Friday 15.5%, Saturday 13.2%, Sunday 4.8%

We use the Establishment Survey to set targets for panel recruitment

Recruitment of panelists has been targeted to a set of specific demographic variables, with a weighting exercise taking place to account for shortfalls in any key target groups. Household size, region and social grade were targeted to profiles established by the National Readership Survey – a gold standard in media measurement.

Presence of children in the household, household tenure and household size were targeted to weights dictated through the initial Establishment Survey conducted through Kantar TNS.
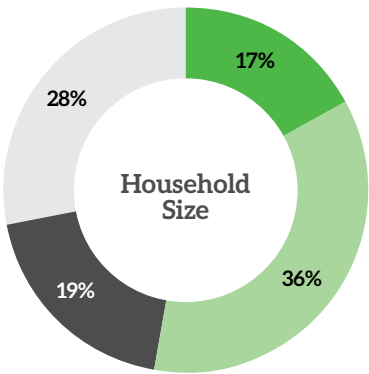
Household size, region and social grade were targeted to profiles established by the National Readership Survey – a gold standard in media measurement.

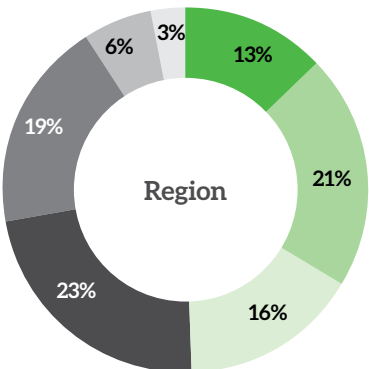**Here is a summary of the key demographics of the panel after weighting**

Presence of children in household

31%
69%
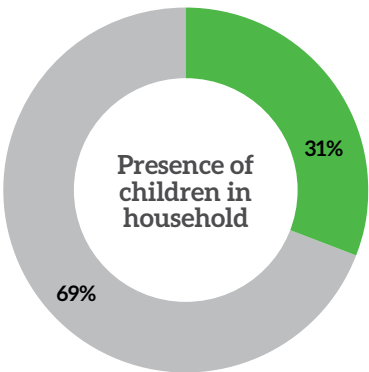
31% of households within the panel have children and 69% do not.

- Yes
- No

Household Size

17%
28%
19%
36%

Household size is representative of the UK population in terms of numbers within each household that are included in the panel.

- 1
- 2
- 3
- 4+

Region

13%
21%
16%
23%
19%
6%
3%

Panelists are also recruited from a regional spread of the UK. With 82% from urban areas and 18% from rural ones.
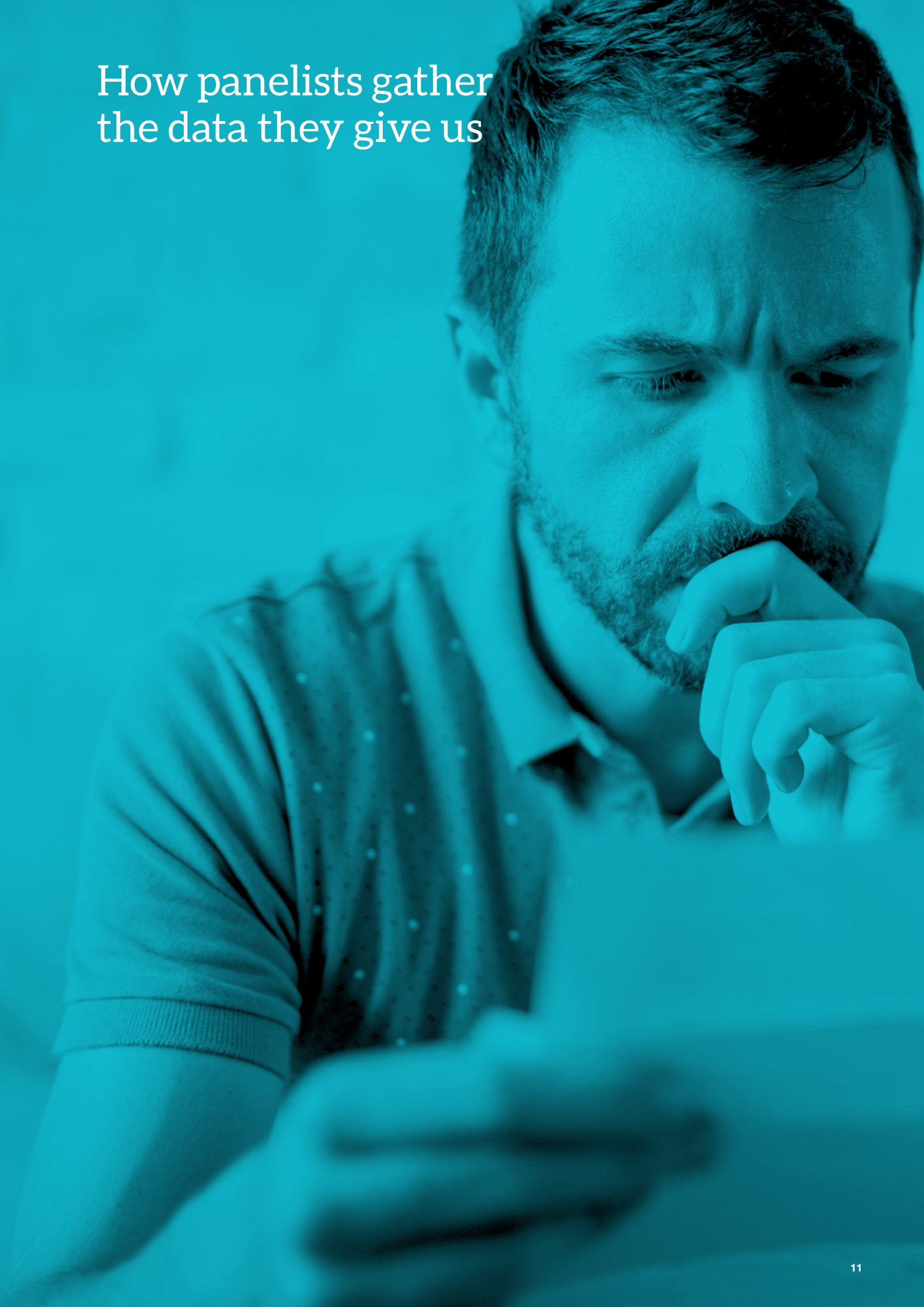
- North East, Yorkshire & The Humber
- North West & West Midlands
- East Midlands & East of England
- London & South East
- South West & Wales
- Scotland
- Northern Ireland

Social Grade

30%
40%
31%
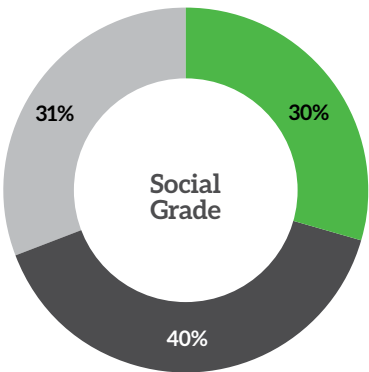
Again, social grade is commensurate with the split against social grade of the national population.

- AB
- C1C2
- DE

How panelists gather the data they give us

We designed and built a mobile app where panelists were able to take a photograph of each piece of mail and upload it to their diary.

As mail isn't a passive medium – you are not just watching or listening, you are actively engaging with the process of receiving, sorting, categorising and reading your mail – we knew we needed a way of collecting data for mail that would be able to cope with this level of engagement.

From the start we understood that to track mail through the house recipients needed a visual reference for each letter they received. This enables them to identify each piece of mail when reporting back on their sharing, reading, re-reading and subsequent commercial actions. In short it acts as a memory prompt to refer back to when reporting on all their interactions with their mail.

We designed and built a mobile app where panelists were able to take a photograph of each piece of mail and upload it to their diary. We also created a paper based entry form, ensuring we could include those within older age groups where smart phone penetration is lower.

We balance the level of data we ask panelists to provide, extracting maximum insight whilst guarding against panel fatigue. Designing the app to make it as easy as possible to fill in the diary was an imperative.

How panelists categorise incoming mail

The diary questionnaire requires all online panelists to take a picture of each mail item that they receive and to classify it using three different attributes:

Mail type
What is it, an addressed, unaddressed letter, a catalogue, a magazine for example.
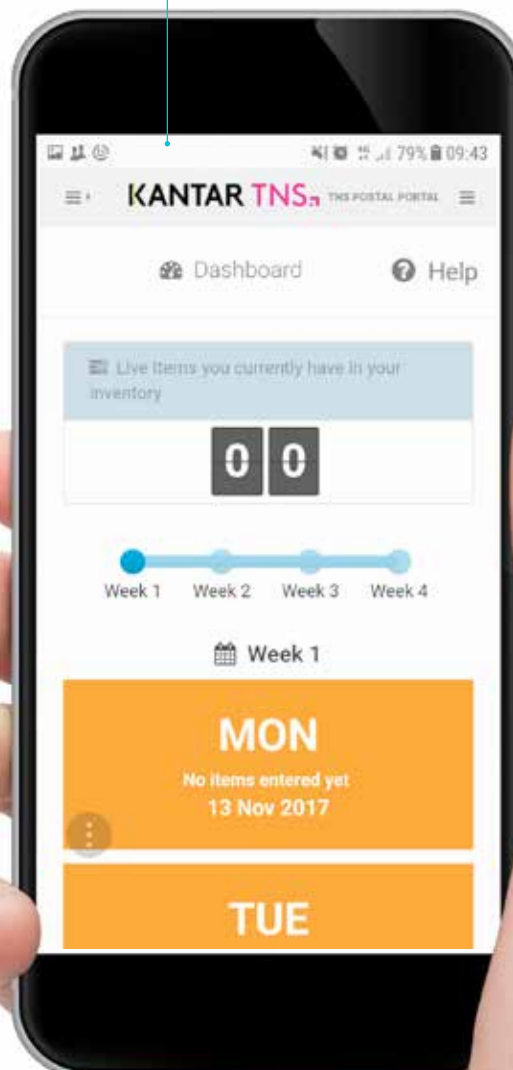
Mail sender
What kind of brand sent the mail, was it Retail, Financial Services, Telecoms or any other sector.

Mail content
What is the main content of the mail, is it information about products or services, is it a special offer, or a request for a donation.

This is the main dashboard, where panelists are taken to when they first open up the app on their smart phone.

1

When a panelist receives a new item of mail, they firstly use this drop down menu to categorise it, that is, tell us what it is. Is it an addressed piece of mail, unaddressed and so on.

Free sheet newspaper, local directory and parcel activity is recorded but not included in final JICMAIL metrics.

2

Then they select who the item(s) is from, that is, what sector does the mail piece come from.

The sectors were carefully developed with the help of initial pilot data to ensure that the panelists found them easy to identify with and thus categorise as many items of mail as possible.

3

We then ask them to tell us how they first dealt with it. They can select more than one option. This approach was based on the findings of our pilot where we discovered that consumers tend to have a process of filtering and sorting the mail they get in the first instance.

4

They also tell us what the main focus of the mailing or door drop was. So for example did it contain an update, vouchers/coupons or a notification/reminder.

5

At this point we collect the follow up actions which can take place at any point in the twenty-eight day period we collect the data.

How panelists tell us what they do with their mail

From our first pilot study and other insight we realised that mail cannot be measured by simple behavioural proxies that other channels use such as "read" or "looked at".

We had to find a more relevant set of language, that reflected the language consumers use when they explain how they deal with their mail.

Consumers talk about opening, sharing, using, and passing on mail. They talk about putting it on display to remind them or others to deal with it. So we needed to create a lexicon and a methodology that could capture and report on exposure for a piece of mail which has been put on the fridge – enabling a consumer to see this every single time they open the fridge door!

The approach we took uses all of the interactions with mail as a proxy for mail exposure – recording the physical actions our panelists take with their mail each day.

Physical actions with mail

JICMAIL panelists can record any of the following types of interaction that they have had with each individual piece of mail delivered to them:

- Opened it

- Threw it away/recycled

- Read/looked/glanced at it

- Took it out of the house (e.g.to work)

- Put it on display (e.g. on a fridge, noticeboard)

- Used/did something with the information

- Filed it for reference or records

- Passed it on/left out for the person it's for

- Put it in the usual place

- Put it aside to look at later

These interactions are recorded both when the mail is initially received and then follow up interactions are recorded on any subsequent occasion that an interaction takes place over a four week period, or until the item in question has been thrown away. Each interaction is logged as an opportunity to see.

If a panelist discards or throws away an item then it is recorded as a single impact as a consumer has to look at it to decide to discard it – after this point it is considered 'dead'. If it is passed on to somebody else, any other actions are then attributed to that other household member.

Unique to mail – the role of the household co-ordinator

At the heart of our thinking throughout the creation of JICMAIL, the panel and the methodology, is "how can we make mail research just like other media".

But when we started with our first pilot we quickly identified one key challenge that is unique to mail - the presence of a household co-ordinator. Our pilot study consistently told us that in each household there is more likely to be a single household co-ordinator who looks after the mail as it enters the home. Their role is typically to sift and sort the mail into relevant categories and then either deal with it or share it with the right people in the household.

The co-ordinator is responsible for logging not only their actions with the mail they receive but also any mail that has been handed to another person in the household.

In our current panel 71% of the households within the panel are represented by a single household co-ordinator and 28% are where more than one person takes responsibility for sorting and distributing the mail amongst people within the household.

Who sorts the mail?

71%

SINGLE HOUSEHOLD CO-ORDINATOR

28%

JOINT RESPONSIBILITY

Defining the
metrics for mail

We have used the same definitions as other media use to define impressions, reach and frequency for mail.

Impressions

An impression is one panelist, reading, looking at, or doing something with an item of mail, once.

Reach

Item reach refers to the number of people in a household who have been exposed to a mail item. When a mail item has been delivered, it is automatically assigned a reach of one on the assumption that the household co-ordinator will be exposed to that item through the act of sorting through the mail.

If a mail item is passed on to another household member, this additional exposure is added to the item reach calculation.

Definition of audience reach

The number of people in the population who have been exposed to a certain type of mail – either expressed as 000's or % of the population or a target audience.

Definition of frequency

The number of times a mail item has been interacted with based on the following list of interactions:

- Opened it
- Threw it away/recycled
- Read/looked/glanced at it
- Took it out of the house (e.g.to work)
- Put it on display (e.g. on a fridge, noticeboard)
- Used/did something with the information
- Filed it for reference or records
- Passed it on/left out for the person it's for
- Put it in the usual place
- Put it aside to look at later

Frequency can be added over the entire twenty-eight day period that an item is considered "live" within the home.

28

**EVEN AFTER
TWENTY-EIGHT DAYS
27%
OF MAIL IS STILL
"LIVE" WITHIN THE
HOUSEHOLD**

It's important to say however that even after twenty-eight days 27% of mail is still "live" within the household, so hasn't been finally dealt with – that is filed away or recycled.

We ask panelists to record all the actions that they have taken with their mail, so they can select as many options as they want. If something is recycled it is attributed a frequency of one, as the household co-ordinator has had one exposure to the piece in order to filter that item.

There is also a raft of commercial activity we collect which cannot directly be linked to someone being exposed to the mail piece. We have not included these in this report as they are not included in our reach and frequency data but they do give some key insight about the commercial metrics that might be attributable to different types of mail. More detail about the commercial activity linked to advertising mail and door drop can be found at **www.jicmail.org.uk** in our extra insight section.

Classifying different types of mail

Our methodology captures everything that has come through a consumer's letter box. This includes free newspapers, magazines, parcels, packets as well as addressed mail, leaflets and door drops.

The primary purpose of JICMAIL was to measure and report on readership, reach and frequency for addressed mail, and door drops.

In order to capture all mail coming into the house and understanding what happens with the total mail received we decided to ensure households capture everything received. This gives us data to understand the different exposure to reach and frequency for different types of mail.

This is so that end users of the currency can understand better how all their types of mail are performing. Here are the classifications we have built.

Addressed mail

This can effectively come from any sector that we capture, from a Supermarket to a Financial and Services business.

It is classified as addressed mail if it clearly contains information about products and services, an offer or drive to web.

Anything that conforms to all three criteria highlighted is advertising mail

These are the categorisations that people select from a drop down menu

TYPE ▼

ADVERTISING MAIL

Letter addressed to me

Letter addressed to someone else in the household

Letter addressed to "household" or "occupier"

Letter for someone who doesn't live here

Leaflet/flyer or other mail with an address

Catalogue addressed to me or someone else in the household

Leaflet/flyer or other mail without an address

Magazine from a publication or organisation we subscribe to

Magazine from a publisher or organisation we don't subscribe to

Local directory

Free paper

Parcel

Other (please specify)

SENDER ▼

ADVERTISING MAIL

TV/Broadband/landline/mobile

Utilities provider (Gas/Water/Electric)

Financial and insurance services

Letting or estate agent

Local tradesperson

Car dealer/manufacturer

Restaurant or takeaway

Supermarket or grocery store

Retailer (e.g. clothing, household electrical, etc)

Mail order/online retailer

Travel/tourism/attractions

Magazine/newspaper/publisher

Medical (NHS, dental, private healthcare, chemist, optical)

Government/council

Charity

Religious organisation

Political parties

Family member or friend

Employer

Other (please specify)

Didn't open/read

CONTENT ▼

ADVERTISING MAIL

Information about products/services

Information about local services

Information about entertainment or activities

Invitation/information about a specific event

Special offers or discounts

Vouchers/coupons

Request for a donation

Sender's contact details (e.g. website, phone number)

Political content

Postal reply

BUSINESS MAIL

Financial statement/bill/update

Loyalty reward statement

News/update/magazine articles

Notification/reminder

Administrative information e.g. account details)

Appointment related information

Didn't open/read

Other (please specify)

Classifying different types of mail

ADVERTISING MAIL

Advertising mail is then split into two different categories as they provide different metrics for planners that can be used to plan both addressed mail (ie mail with name and address to an individual) and unaddressed mail (or door drop) which arrives in the home with no address. Clearly one is more targeted than the other and this is reflected in the reach and frequency metrics.

ADDRESSED MAIL

An item of mail addressed to an individual in the household

DOOR DROP

Door drops are any item of mail with no address on it.

Anything that conforms to all three criteria highlighted is addressed mail

TYPE ▼	SENDER ▼	CONTENT ▼
ADDRESSED MAIL		**ADVERTISING MAIL**
Letter addressed to me	*TV/Broadband/landline/mobile*	*Information about products/ services*
Letter addressed to someone else in the household	*Utilities provider (Gas/Water/Electric)*	*Information about local services*
Letter addressed to "household" or "occupier"	*Financial and insurance services*	*Information about entertainment or activities*
Letter for someone who doesn't live here	*Letting or estate agent*	*Invitation/information about a specific event*
Leaflet/flyer or other mail with an address	*Local tradesperson*	*Special offers or discounts*
Catalogue addressed to me or someone else in the household	*Car dealer/manufacturer*	*Vouchers/coupons*
	Restaurant or takeaway	*Request for a donation*
Leaflet/flyer or other mail without an address	*Supermarket or grocery store*	*Sender's contact details (e.g. website, phone number)*
Magazine from a publication or organisation we subscribe to	*Retailer (e.g. clothing, household electrical, etc)*	*Political content*
Magazine from a publisher or organisation we don't subscribe to	*Mail order/online retailer*	*Postal reply*
Local directory	*Travel/tourism/attractions*	**BUSINESS MAIL**
Free paper	*Magazine/newspaper/publisher*	*Financial statement/bill/update*
Parcel	*Medical (NHS, dental, private healthcare, chemist, optical)*	*Loyalty reward statement*
Other (please specify)	*Government/council*	*News/update/magazine articles*
	Charity	*Notification/reminder*
	Religious organisation	*Administrative information e.g. account details)*
	Political parties	*Appointment related information*
	Family member or friend	*Didn't open/read*
	Employer	*Other (please specify)*
	Other (please specify)	
	Didn't open/read	

ADDRESSED MAIL (vertical labels on TYPE, SENDER, and CONTENT columns)

Door drops

These are items which do not have an address and are not addressed to a "householder" or "occupant". Again, of course, they will come from any sector and can be from any sender.

Anything that conforms to all three criteria highlighted is door drops

TYPE ▾	SENDER ▾	CONTENT ▾
Letter addressed to me	TV/Broadband/landline/mobile	**ADVERTISING MAIL**
Letter addressed to someone else in the household	Utilities provider (Gas/Water/Electric)	Information about products/ services
Letter addressed to "household" or "occupier"	Financial and insurance services	Information about local services
Letter for someone who doesn't live here	Letting or estate agent	Information about entertainment or activities
Leaflet/flyer or other mail with an address	Local tradesperson	Invitation/information about a specific event
Catalogue addressed to me or someone else in the household	Car dealer/manufacturer	Special offers or discounts
Leaflet/flyer or other mail without an address	Restaurant or takeaway	Vouchers/coupons
Magazine from a publication or organisation we subscribe to	Supermarket or grocery store	Request for a donation
Magazine from a publisher or organisation we don't subscribe to	Retailer (e.g. clothing, household electrical, etc)	Sender's contact details (e.g. website, phone number)
Local directory	Mail order/online retailer	Political content
Free paper	Travel/tourism/attractions	Postal reply
Parcel	Magazine/newspaper/publisher	**BUSINESS MAIL**
Other (please specify)	Medical (NHS, dental, private healthcare, chemist, optical)	Financial statement/bill/update
	Government/council	Loyalty reward statement
	Charity	News/update/magazine articles
	Religious organisation	Notification/reminder
	Political parties	Administrative information e.g. account details)
	Family member or friend	Appointment related information
	Employer	Didn't open/read
	Other (please specify)	Other (please specify)
	Didn't open/read	

DOOR DROPS

Business mail

Business mail again can come from any sector that we capture but it must contain a financial statement, bill, notification or reminder rather than a selling message. Business mail is not a key focus for this study but we have included a section on business mail in order for planners to be able to understand the reach and frequency of customer communications which is what this portion of mail includes.

Anything that conforms to all three criteria highlighted is business mail

TYPE ▼	SENDER ▼	CONTENT ▼
Letter addressed to me	*TV/Broadband/landline/mobile*	**ADVERTISING MAIL**
Letter addressed to someone else in the household	*Utilities provider (Gas/Water/Electric)*	*Information about products/ services*
Letter addressed to "household" or "occupier"	*Financial and insurance services*	*Information about local services*
Letter for someone who doesn't live here	*Letting or estate agent*	*Information about entertainment or activities*
Leaflet/flyer or other mail with an address	*Local tradesperson*	*Invitation/information about a specific event*
Catalogue addressed to me or someone else in the household	*Car dealer/manufacturer*	*Special offers or discounts*
	Restaurant or takeaway	*Vouchers/coupons*
Leaflet/flyer or other mail without an address	*Supermarket or grocery store*	*Request for a donation*
Magazine from a publication or organisation we subscribe to	*Retailer (e.g. clothing, household electrical, etc)*	*Sender's contact details (e.g. website, phone number)*
Magazine from a publisher or organisation we don't subscribe to	*Mail order/online retailer*	*Political content*
	Travel/tourism/attractions	*Postal reply*
Local directory	*Magazine/newspaper/publisher*	**BUSINESS MAIL**
Free paper	*Medical (NHS, dental, private healthcare, chemist, optical)*	*Financial statement/bill/update*
Parcel	*Government/council*	*Loyalty reward statement*
Other (please specify)	*Charity*	*News/update/magazine articles*
	Religious organisation	*Notification/reminder*
	Political parties	*Administrative information e.g. account details)*
	Family member or friend	*Appointment related information*
	Employer	*Didn't open/read*
	Other (please specify)	*Other (please specify)*
	Didn't open/read	

Column labels (left side, vertical): BUSINESS MAIL

What we capture but don't track

We ask recipients to tell us about other things they receive in their post daily but we don't ask them to record the life of that mail in the household.

We don't track:

- Local directories

- Free papers

- Parcels

- Personal mail, like birthday cards or letters

The volume of mail recorded

The households in the panel have collected thousands of individual pieces of mail, and the volumes of mail have been collected since the beginning of April 2017, which represents over 5 months' of mail. This will continue to build over the course of the panel, which runs continuously.

From April to September 2017 we collected two quarters of data. 1,150 households were included in the panel and 136,812 mail interactions recorded. Panelists are regularly rotated in and out of the panel in order to avoid panel fatigue.

Volume of mail items collected

6,444

8,553

19,560
mail items

4,563

- Addressed mail
- Door drop
- Business mail
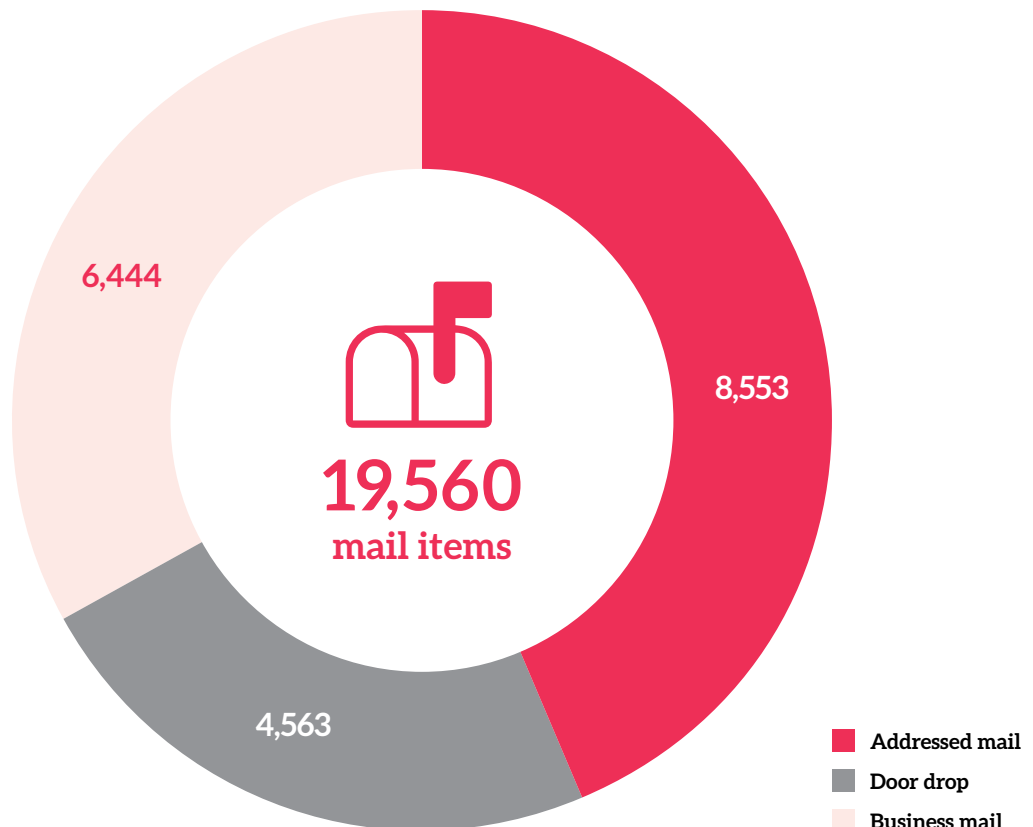
What do consumers do with their addressed mail?

They open it – at least 65% of all mail items are opened. 57% of all addressed mail is opened immediately, with a further 21% opened subsequently. When asking why 100% isn't opened we should note that not all addressed mail can be physically opened. For example catalogues and leaflets may not need to be physically opened as they don't come in any outer carrier, and one piece mailers that also don't need conventional "opening" are common.

26% of addressed mail is recycled after being first received, but only after some form of exposure has been recorded. Another 30% of mail is subsequently recycled at some point in the following three weeks, but normally after other actions have been recorded such as read, put aside for later or used/did something with the information.

27% of all mail is still "live" after the twenty-eight days reporting period. Further study will be scheduled to establish more detail on this statistic. JICMAIL will report further when the new findings are available.

What do consumers do when the mail first arrives in the home?

The chart below captures panelist behaviours when mail is initially received. The majority of actions relate to opening and reading, storing, recycling and sharing.

% of items with initial actions taken when item is logged

Action	%
Opened it	57.1%
Read/looked/glanced at it	48.5%
Threw it away/recycled	26.2%
Put it aside to look at later	24%
Passed it on/left out for the person it's for	9.1%
Put it in the usual place	8.4%
Filed it for reference or records	5.3%
Used/did something with the information	3.6%
Put it on display (e.g. on a fridge, noticeboard)	1.6%
Took it out of the house (e.g. to work)	0.4%

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

What do consumers do with their addressed mail?

% of items with subsequent actions within twenty-eight day period

Action	%
Opened it	20.8%
Read/looked/glanced at it	23.1%
Threw it away/recycled	30.3%
Put it aside to look at later	5.2%
Passed it on/left out for the person it's for	2.4%
Put it in the usual place	3.7%
Filed it for reference or records	9.4%
Used/did something with the information	6.6%
Put it on display (e.g. on a fridge, noticeboard)	1.7%
Took it out of the house (e.g. to work)	1.9%

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

Over the subsequent twenty-eight days they are still opening their mail.

Not surprisingly in the period after initially logging what they did more mail is thrown away or recycled as households sort and sift their mail. But a further 20.8% of mail is opened and 6.6% used it or did something with their mail and those filing away the mail piece rises to 9.4%.

28

Addressed mail item reach

Category	Reach
Automotive	1.2
Political	1.2
Government/council	1.2
Medical	1.2
Tradesperson	1.2
Financial services	1.2
Retail	1.1
Charity	1.1
Utility	1.1
Quadplay	1.1
Leisure	1.1
Magazine/newspaper	1.1
Grocery	1.1
Mail order/online retail	1.1
Religious	1.1
Restaurant/takeaway	1.1
Letting/estate agent	1.1

0.0   0.5   1.0   1.5
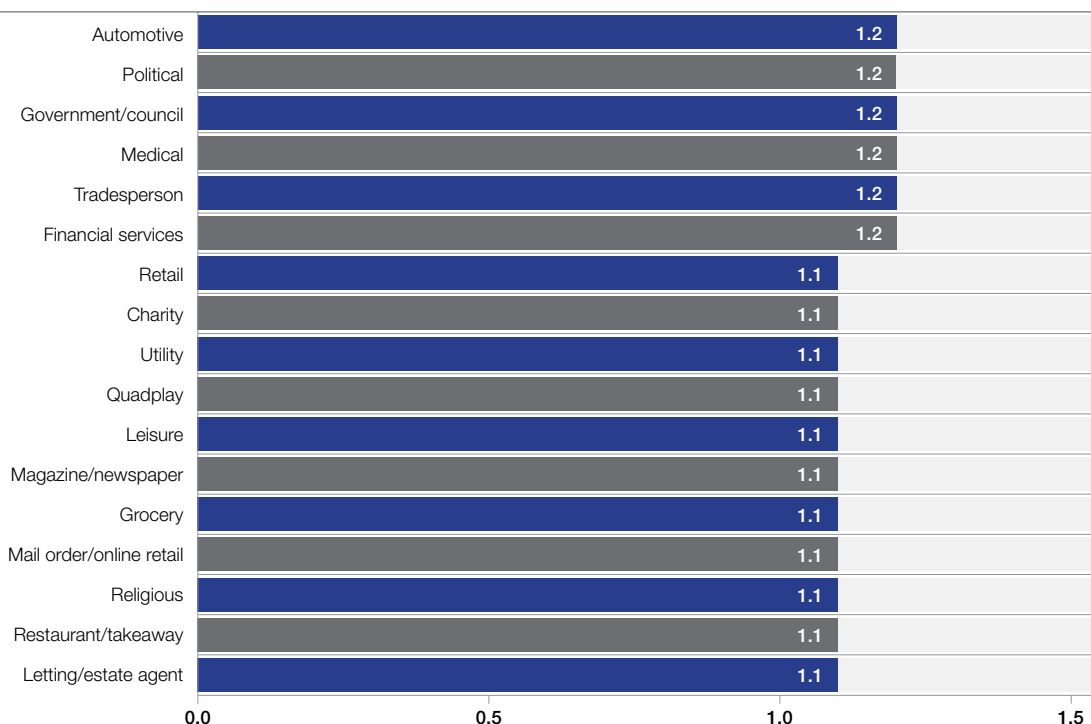
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

How many individuals see each piece of mail?

The average reach across addressed mail is 1.2. Every item of mail achieves a reach of plus 1. Information from the Government or Local Council is more likely to be shared but alongside this Car Dealership or Car Manufacturer mailings are shared within the household at a higher rate. So for every 100 people receiving a mailing pack in these sectors each one is shared with another 20 people.

What do consumers do with their addressed mail?

Addressed mail frequency

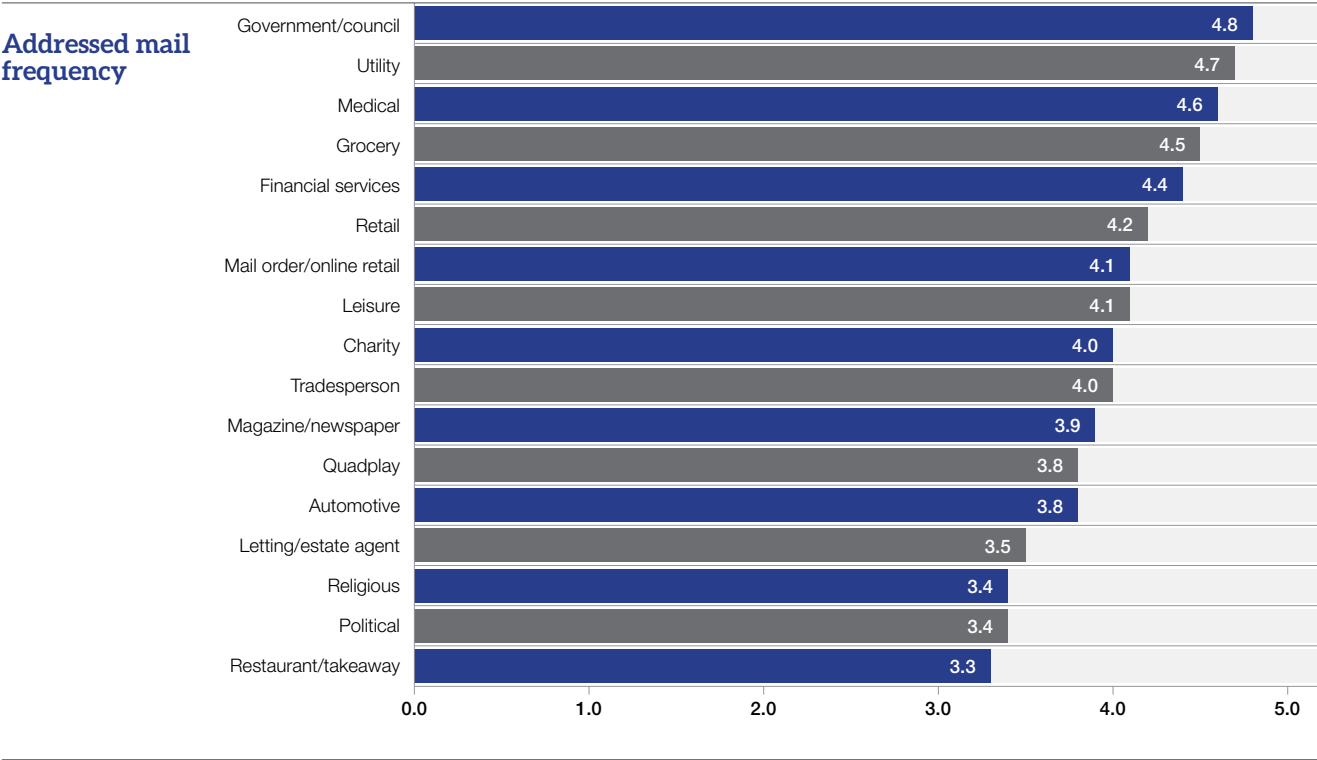| Category	Frequency
Government/council	4.8
Utility	4.7
Medical	4.6
Grocery	4.5
Financial services	4.4
Retail	4.2
Mail order/online retail	4.1
Leisure	4.1
Charity	4.0
Tradesperson	4.0
Magazine/newspaper	3.9
Quadplay	3.8
Automotive	3.8
Letting/estate agent	3.5
Religious	3.4
Political	3.4
Restaurant/takeaway	3.3

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

How many times is each piece of mail re-visited?

The average frequency across addressed mail is 4.2.

The lowest frequency still means that an item is revisited, on average, over three times.

Top ranking frequency is Government and Council communications at a frequency of 4.8, closely followed by Utilities, Medical information, Supermarkets/Grocery and Financial and Insurance Services.

4.2

What types of mail are shared in the home
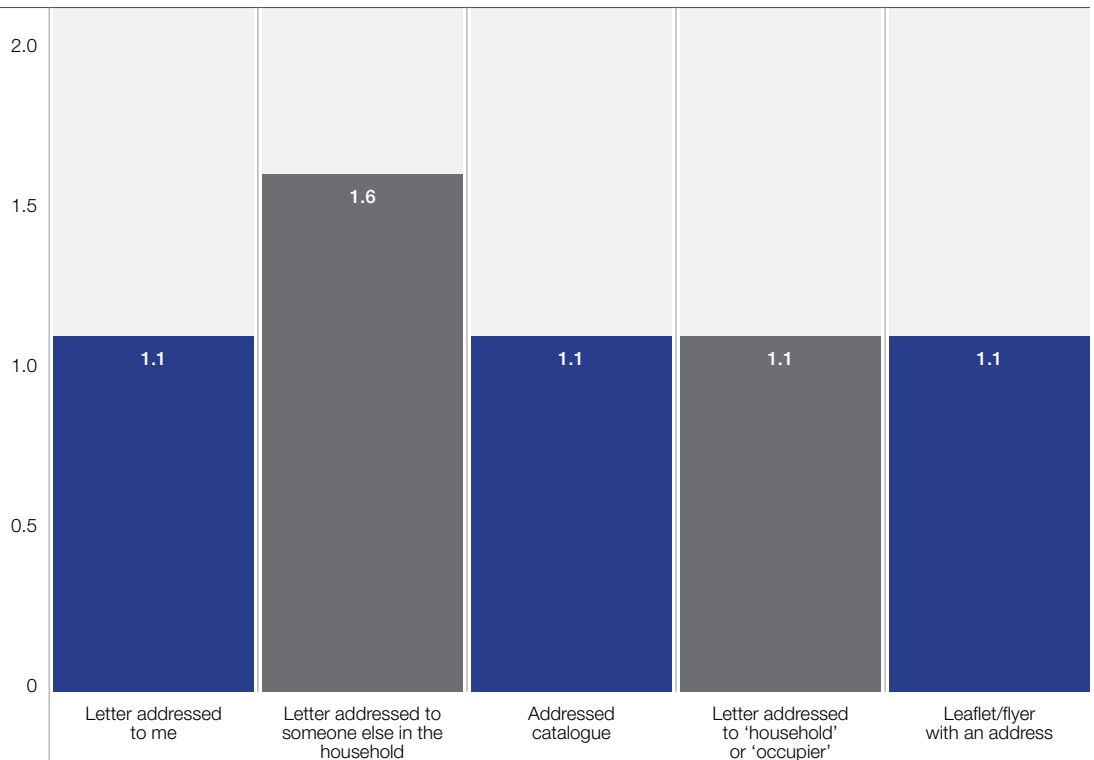
	Letter addressed to me	Letter addressed to someone else in the household	Addressed catalogue	Letter addressed to 'household' or 'occupier'	Leaflet/flyer with an address
	1.1	1.6	1.1	1.1	1.1

Where is mail shared the most?

Reach by type of mail only varies when you look at "letter addressed to someone else", not surprisingly this is highest and reflects the fact that the household co-ordinator is sorting the mail and passing it on to others to read. The reach is very consistent across all types of mail.

What do consumers do with their addressed mail?
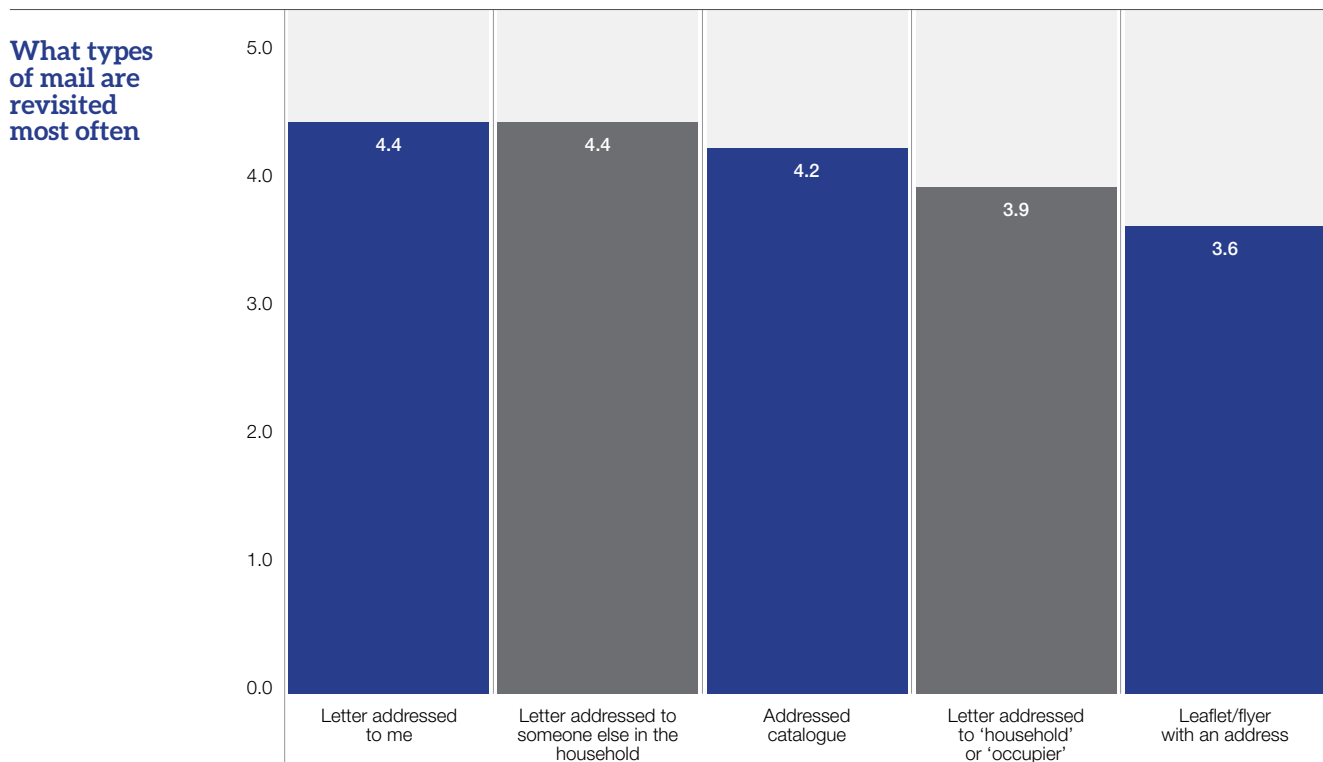
What types of mail are revisited most often

Value	Category
4.4	Letter addressed to me
4.4	Letter addressed to someone else in the household
4.2	Addressed catalogue
3.9	Letter addressed to 'household' or 'occupier'
3.6	Leaflet/flyer with an address

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

Do different households revisit mail at different rates?

Letters do command a higher frequency than catalogues or "partially" addressed mail. Leaflets and flyers are revisited 3.6 times.

Which types of households share mail

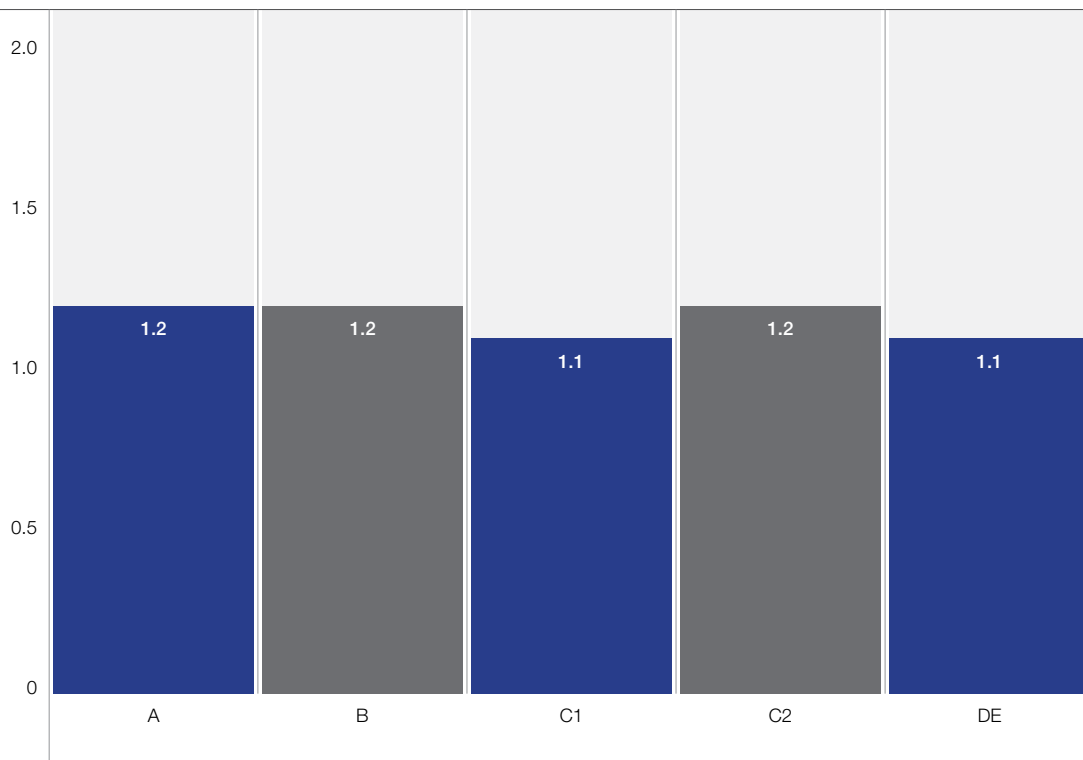|	A	B	C1	C2	DE
	1.2	1.2	1.1	1.2	1.1

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

Do different households share mail at different rates?

Sharing is highest amongst ABs and C2s, but only marginally different from the other socio-economic groups.

What do consumers do with their addressed mail?

Reach of addressed mail by household size
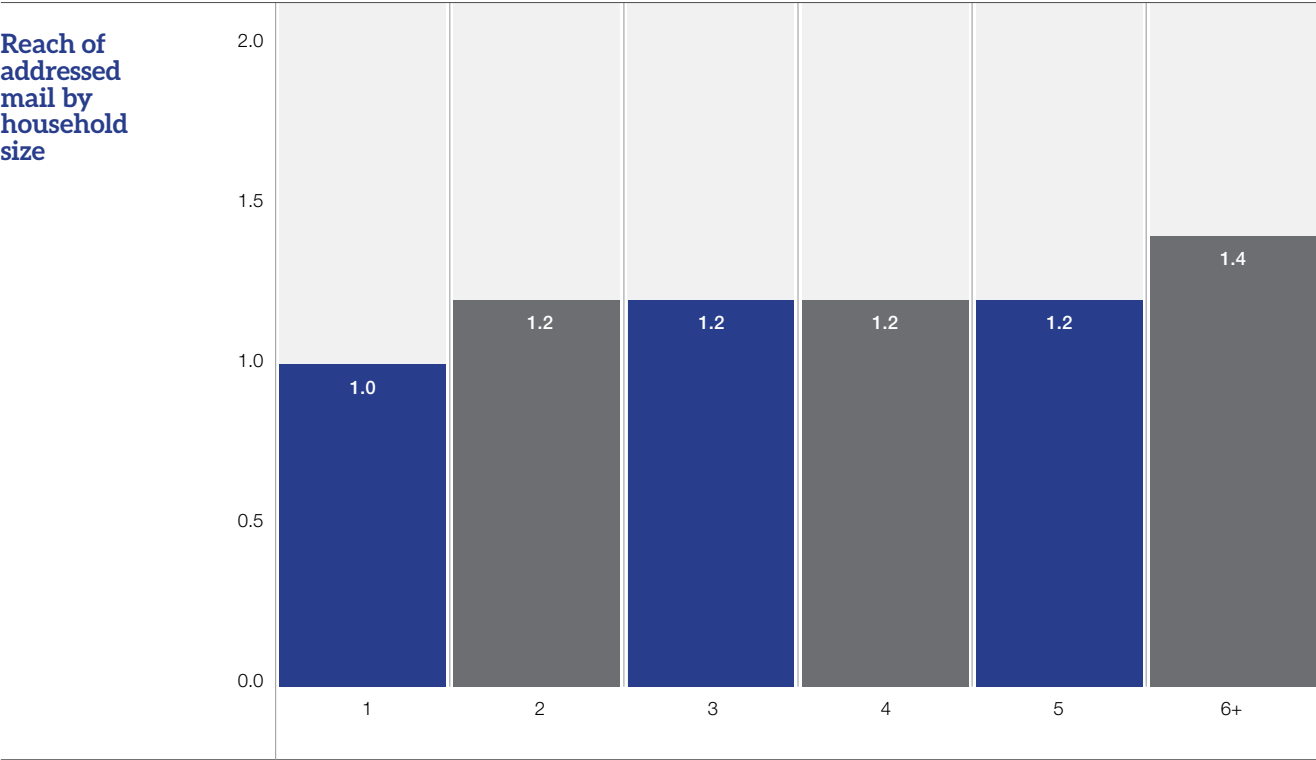
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

Does the household size affect reach?

Single households do have a lower reach than those with two or more people. Of course the highest reach we see is within households where there are six or more occupants. Where there are more people to see mail the reach is naturally higher.

Reach of addressed mail by region

Region	Value
East Midlands and East of England	1.2
London and South East	1.1
North East, Yorkshire and the Humber	1.2
North West and West Midlands	1.1
Nothern Ireland	1.1
Scotland	1.1
South West and Wales	1.1

Are there regional differences for reach?

Reach by region is also a fairly consistent pattern but with slightly higher reach in the East Midlands and East of England and North East Yorkshire and the Humber.
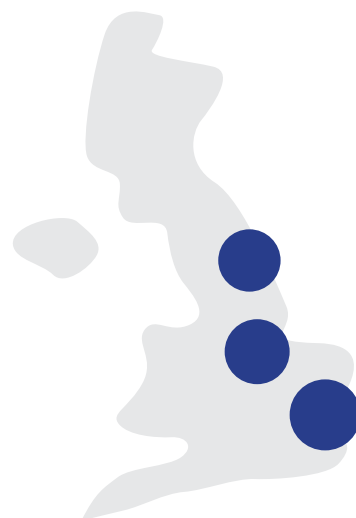
Addressed mail frequency by social group

Chart values:
- A: 4.1
- B: 4.0
- C1: 4.1
- C2: 4.6
- DE: 4.5
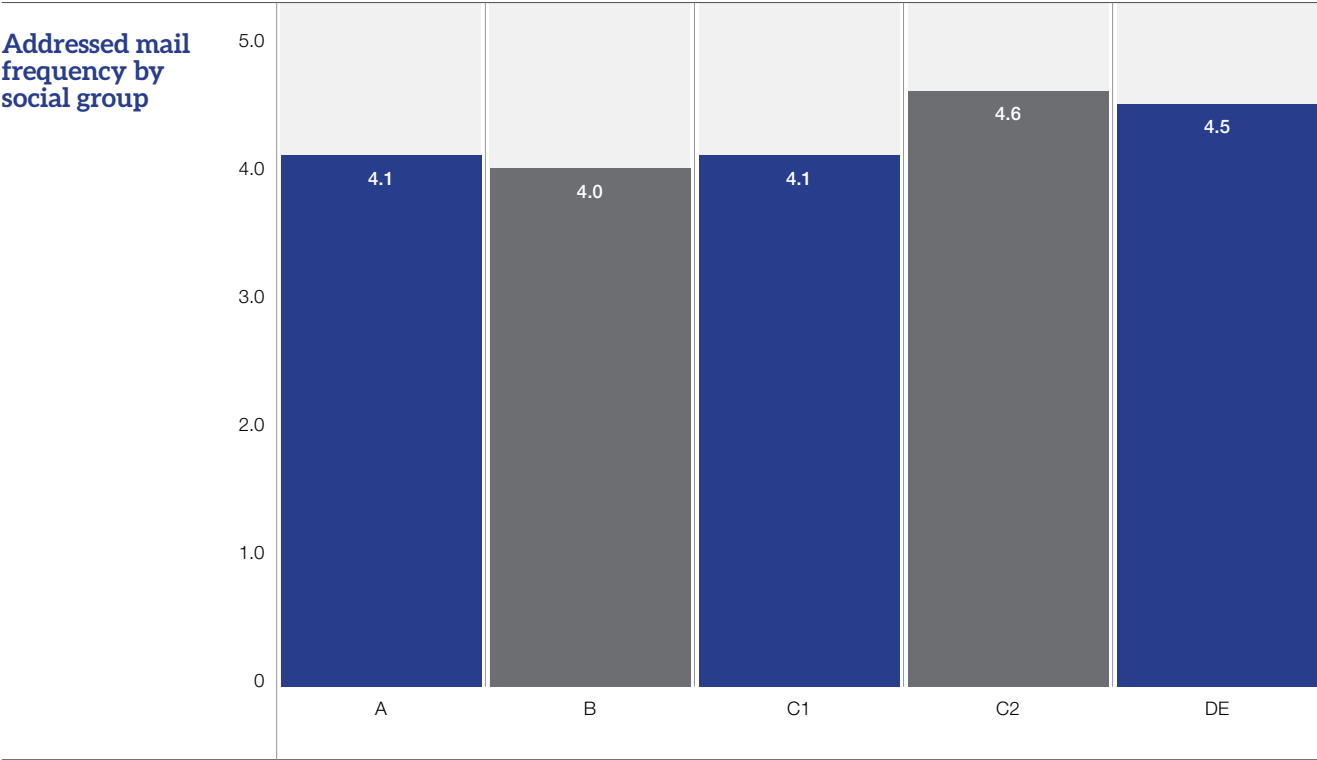
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

How do different socio-economic groups revisit mail?

Frequency does show some marked differences, with those in the higher social grades a bit less likely to go back to their mail so often. However those within C2 and DE social grades are more likely to return to their mail.

Addressed mail frequency by household size

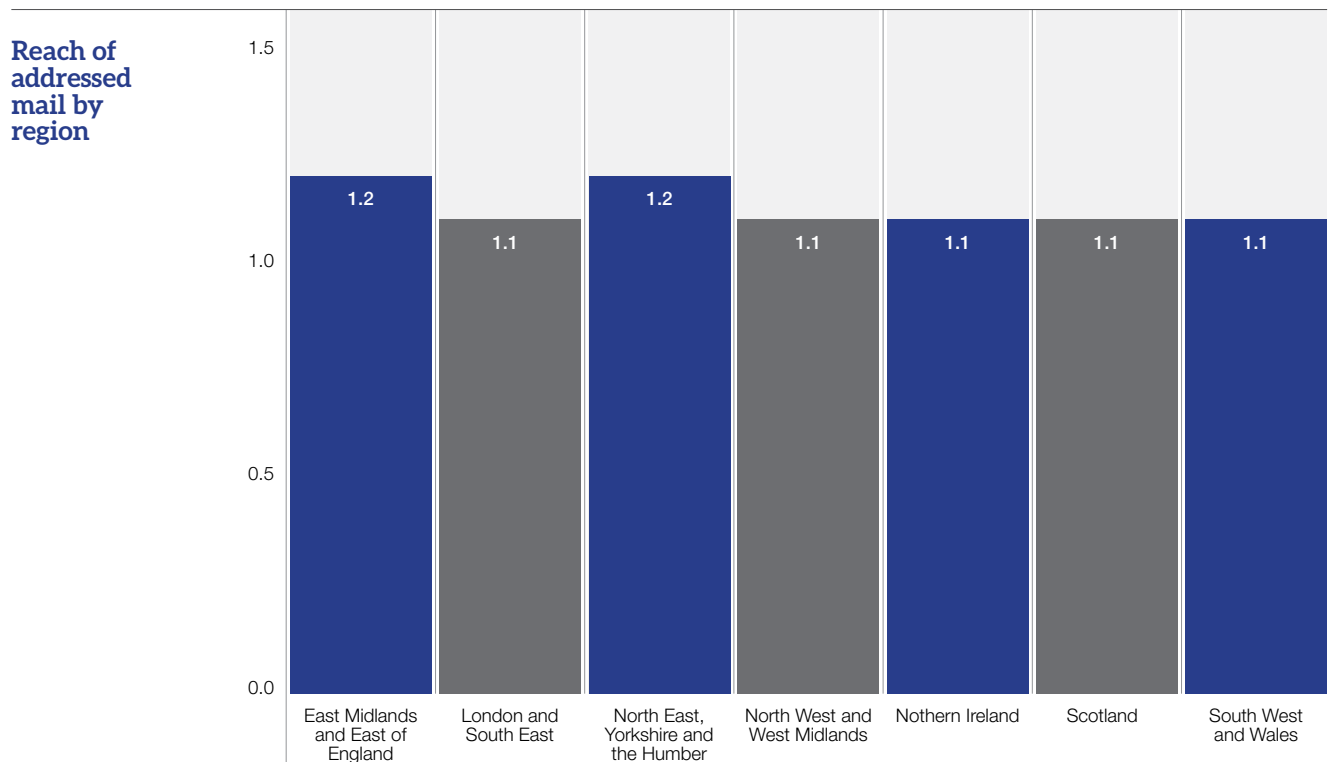|					
4.0	4.4	4.3	4.0	4.1	4.4
1	2	3	4	5	6+
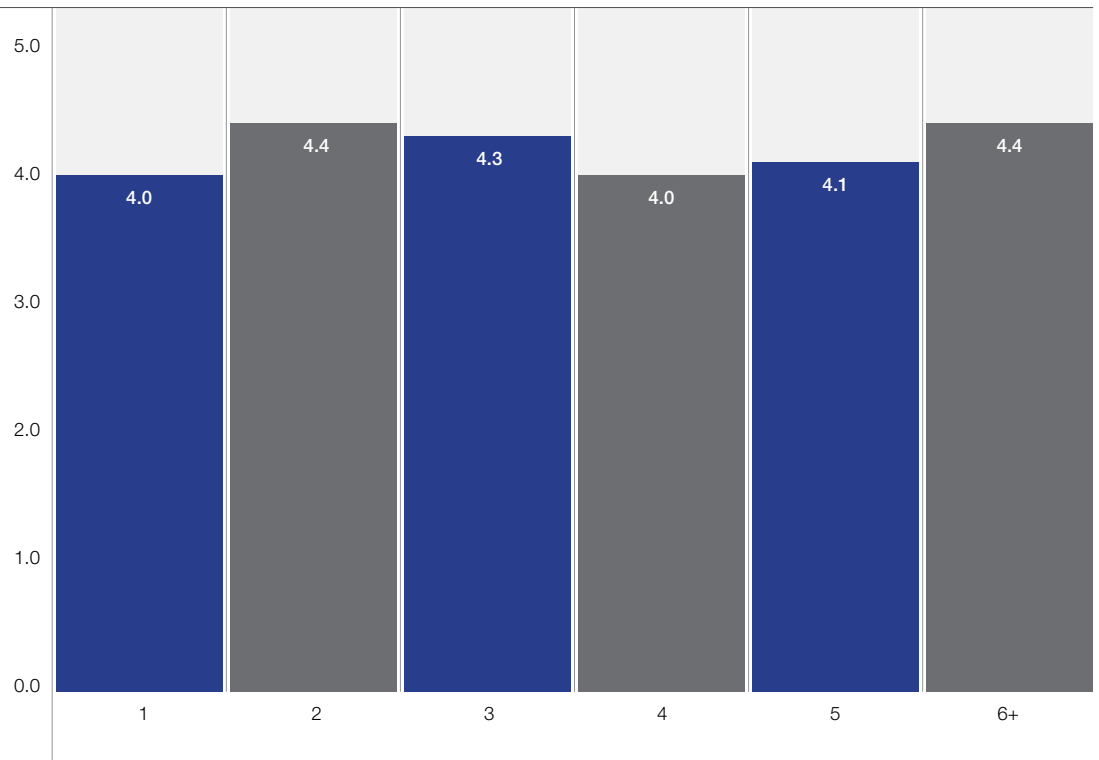
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

Does household size affect frequency?

In households that comprise couples they are a bit more likely to return to their mail, along with those in 6+ households. Typically households made up of four inhabitants tend to be young families and mature families who maybe have less time for their mail.

What do consumers do with their addressed mail?

Addressed mail frequency by region

Region	Value
East Midlands and East of England	4.1
London and South East	4.2
North East, Yorkshire and the Humber	4.5
North West and West Midlands	4.0
Nothern Ireland	4.4
Scotland	4.3
South West and Wales	4.3
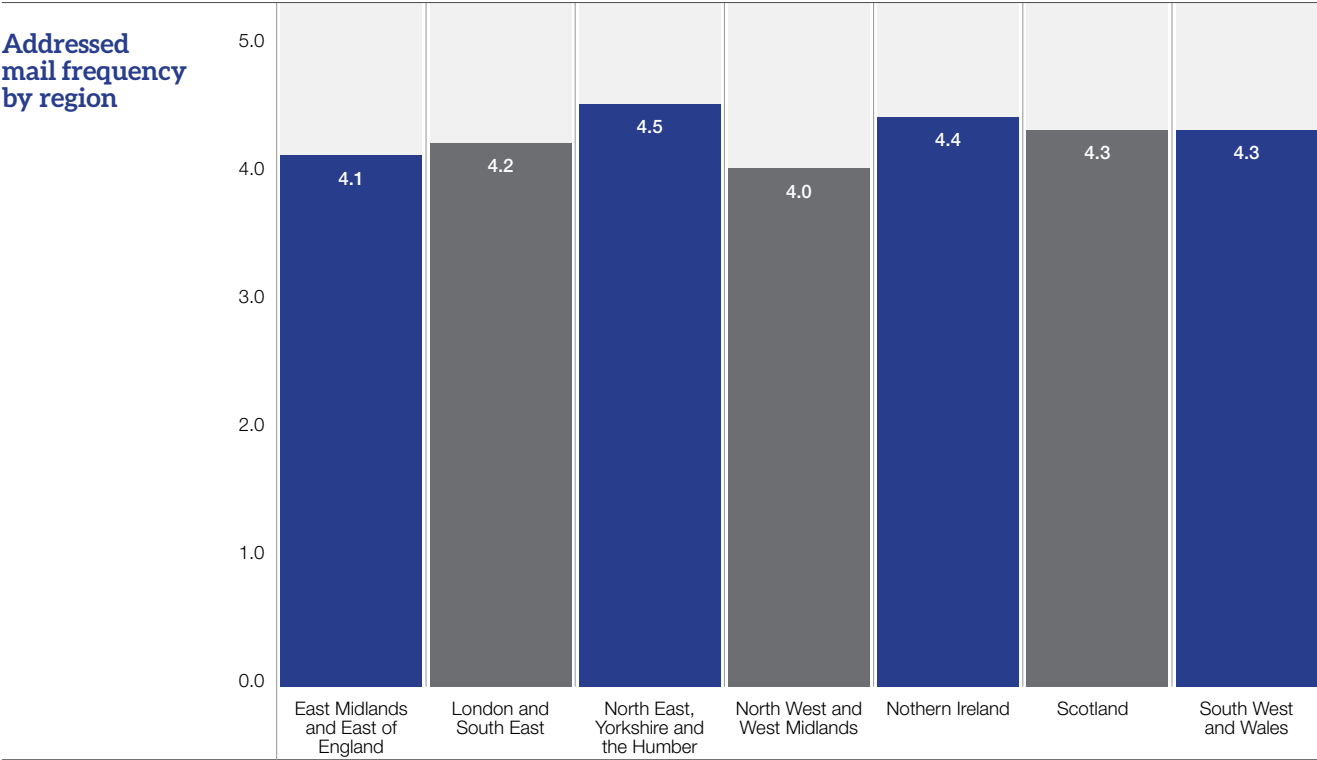
Source: JICMAIL Q2&Q3, Kantar TNS, 2017.
Base: Addressed Advertising Mail Items n=8,553

Are there any regional differences in frequency?

The North East, Yorkshire and the Humber area and Northern Ireland have higher frequency rates than the North West and West Midlands.
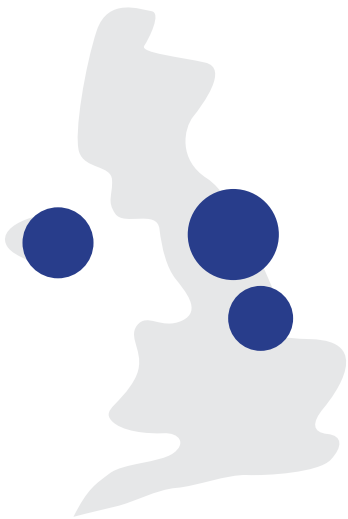
What do consumers do with their door drops?

What do consumers do with their door drops?

% of items with actions over twenty-eight days

Action	%
Opened it	5.7%
Read/looked/glanced at it	60.5%
Threw it away/recycled	85.8%
Put it aside to look at later	15.8%
Filed it for reference or records	2.2%
Put it in the usual place	5.3%
Passed it on/left out for the person it's for	0.8%
Used/did something with the information	1.9%
Put it on display (e.g. on a fridge, noticeboard)	2.2%
Took it out of the house (e.g. to work)	0.5%
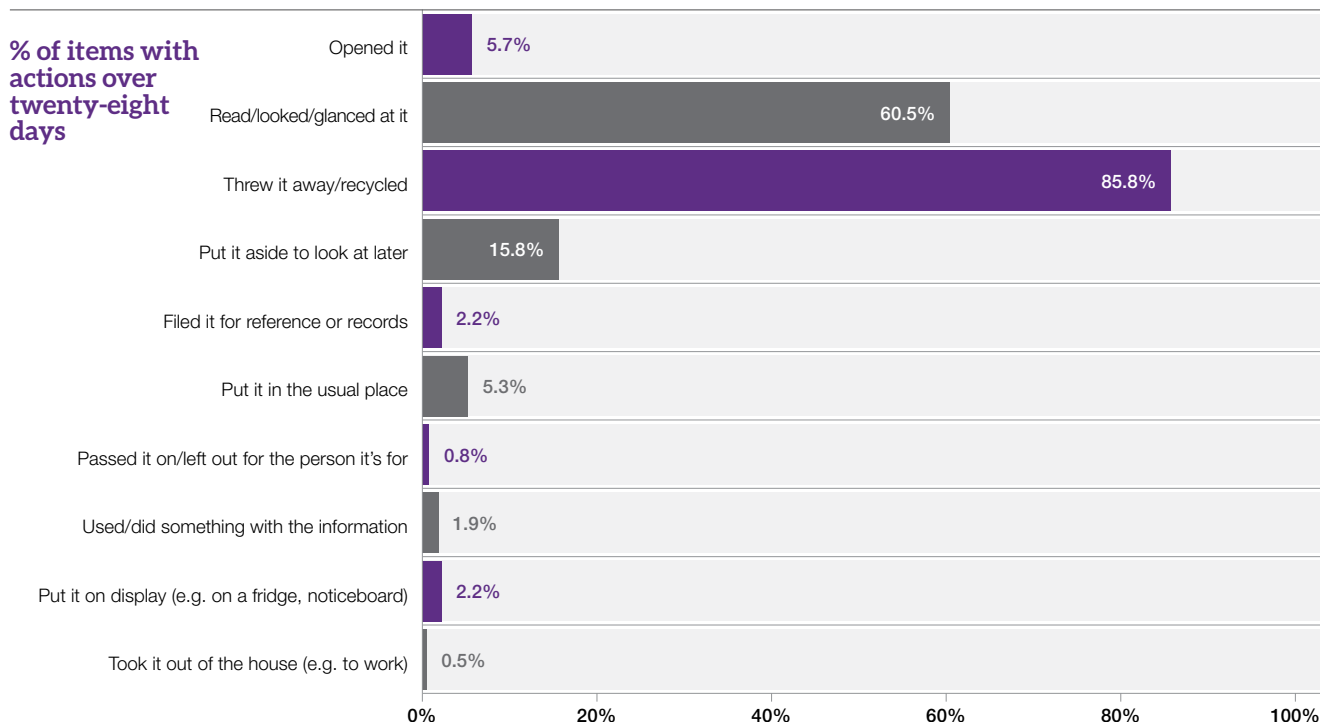
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Addressed Advertising Mail Items n=8,553

Fewer door drop items are "opened", not surprisingly, as a lot of door drop items are not necessarily contained within an envelope.

59% of door drops are thrown away or recycled at the initial stage, but after some form of exposure has been recorded. 85% of door drops are thrown away or recycled within the full twenty-eight days of tracking but only after some form of exposure.

30% is thrown away or recycled at a follow up stage at some point throughout the four week tracking period after other exposures have been recorded.

Door drop reach by sender

Sender	Reach
Government/council	1.2
Mail order/online retail	1.1
Grocery	1.1
Political	1.1
Restaurant/takeaway	1.1
Retail	1.1
Medical	1.0
Charity	1.0
Tradesperson	1.0
Quadplay	1.0
Leisure	1.0
Letting/estate agent	1.0
Utility	1.0
Financial services	1.0
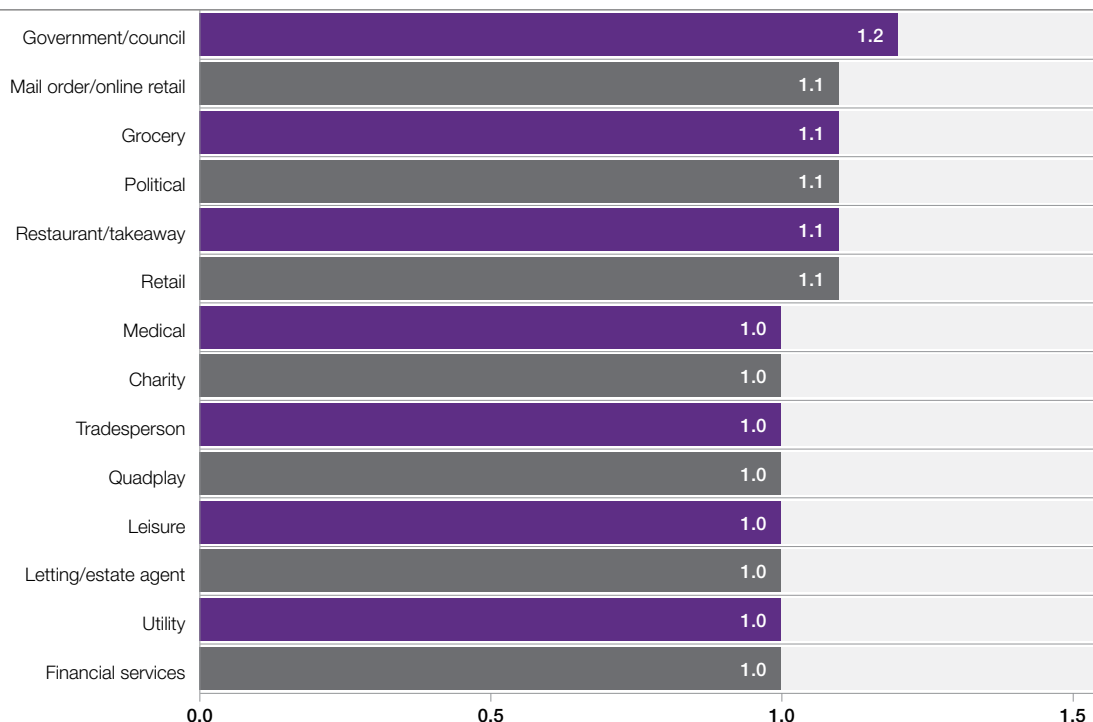
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

Door drop reach and frequency

For every 100 door drops that are sent out another 10 people will see them.

How many individuals see each door drop?

Like addressed mail the highest category for reach is for Government/Council communications. After this though the order changes and the top ranking sectors for door drop are Mail Order/Online Retailers, Supermarkets, Political Parties and Restaurants/Takeaways and Retailers.
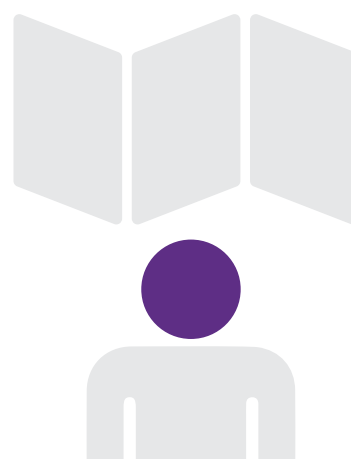
What do consumers do with their door drops?

Door drop frequency by sender

Sender	Value
Government/council	3.7
Grocery	3.1
Restaurant/takeaway	3.1
Political	3.1
Tradesperson	3.0
Leisure	3.0
Medical	3.0
Charity	3.0
Mail order/online retail	3.0
Retail	2.9
Quadplay	2.9
Financial services	2.8
Letting/estate agent	2.7
Utility	2.7

0.0   1.0   2.0   3.0   4.0
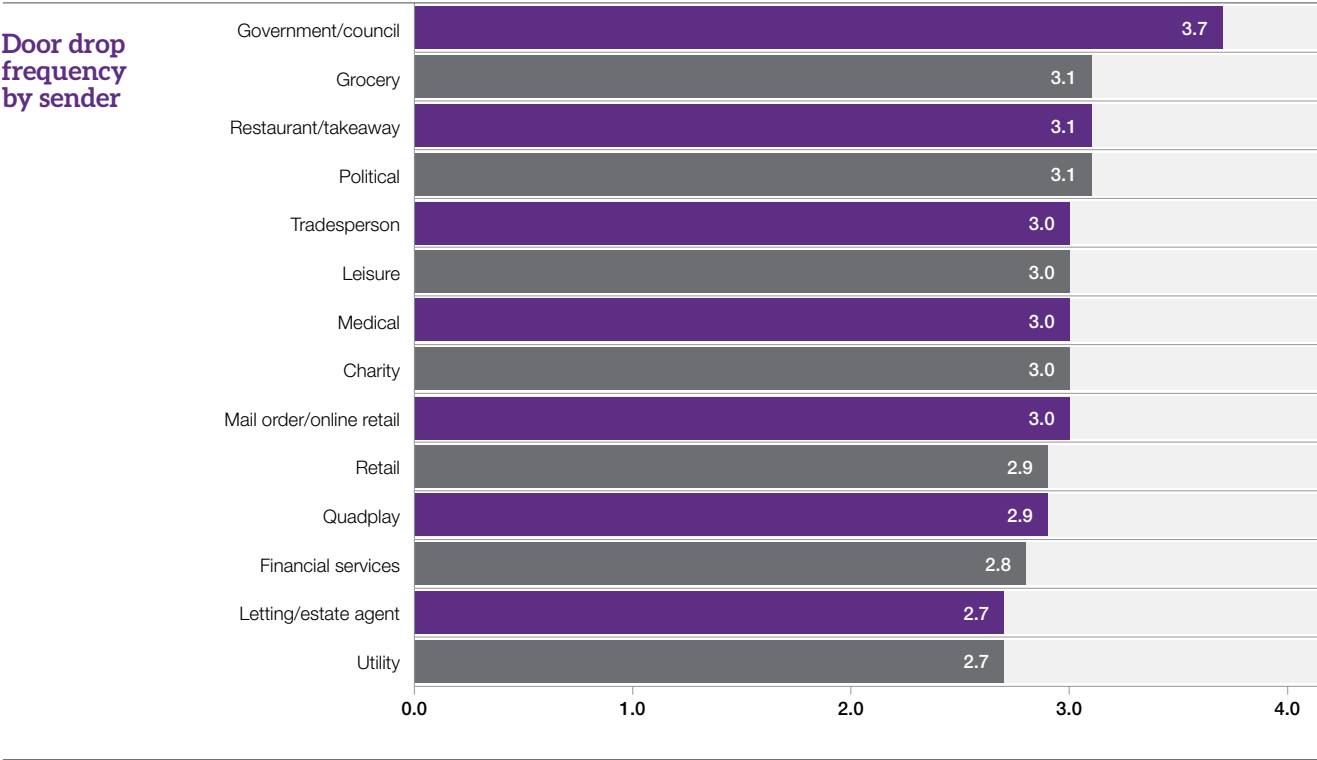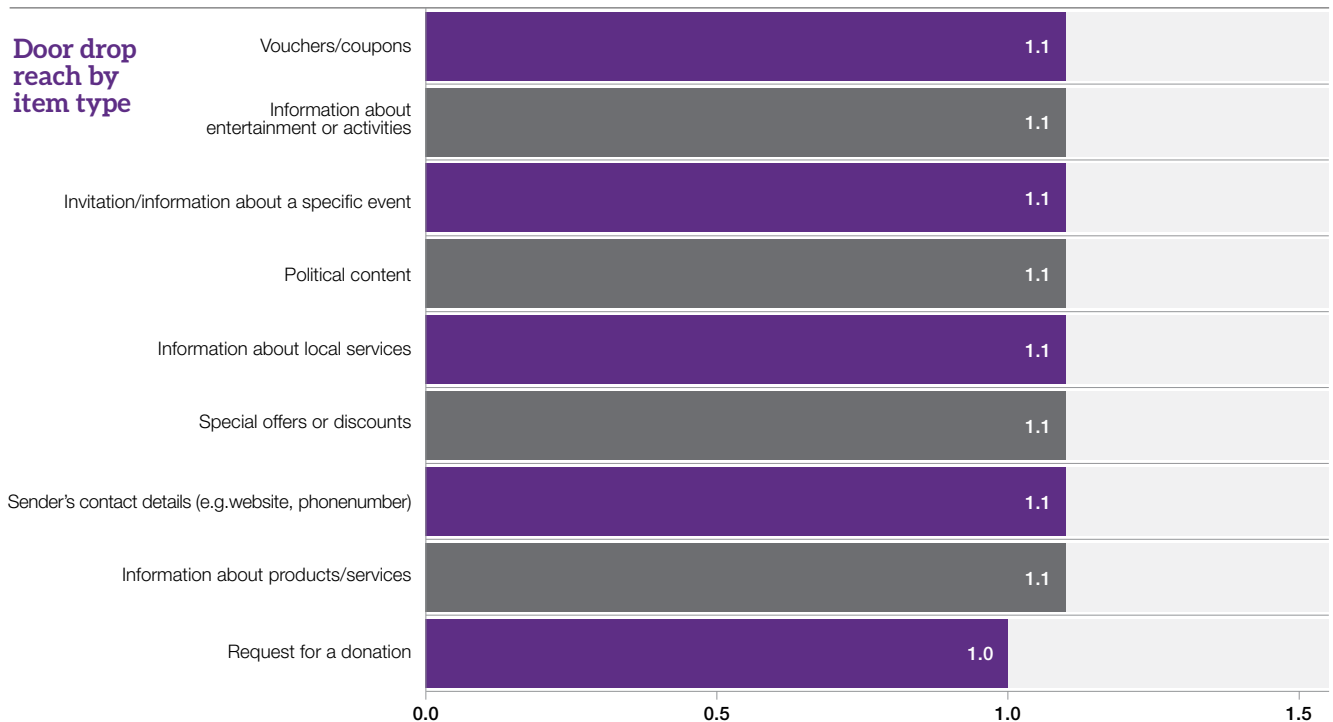
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

How many times is each door drop re-visited?

The average frequency for door drop is 3.

The frequency by sector reflects a similar pattern to that of reach by sector.

3

Door drop reach by item type

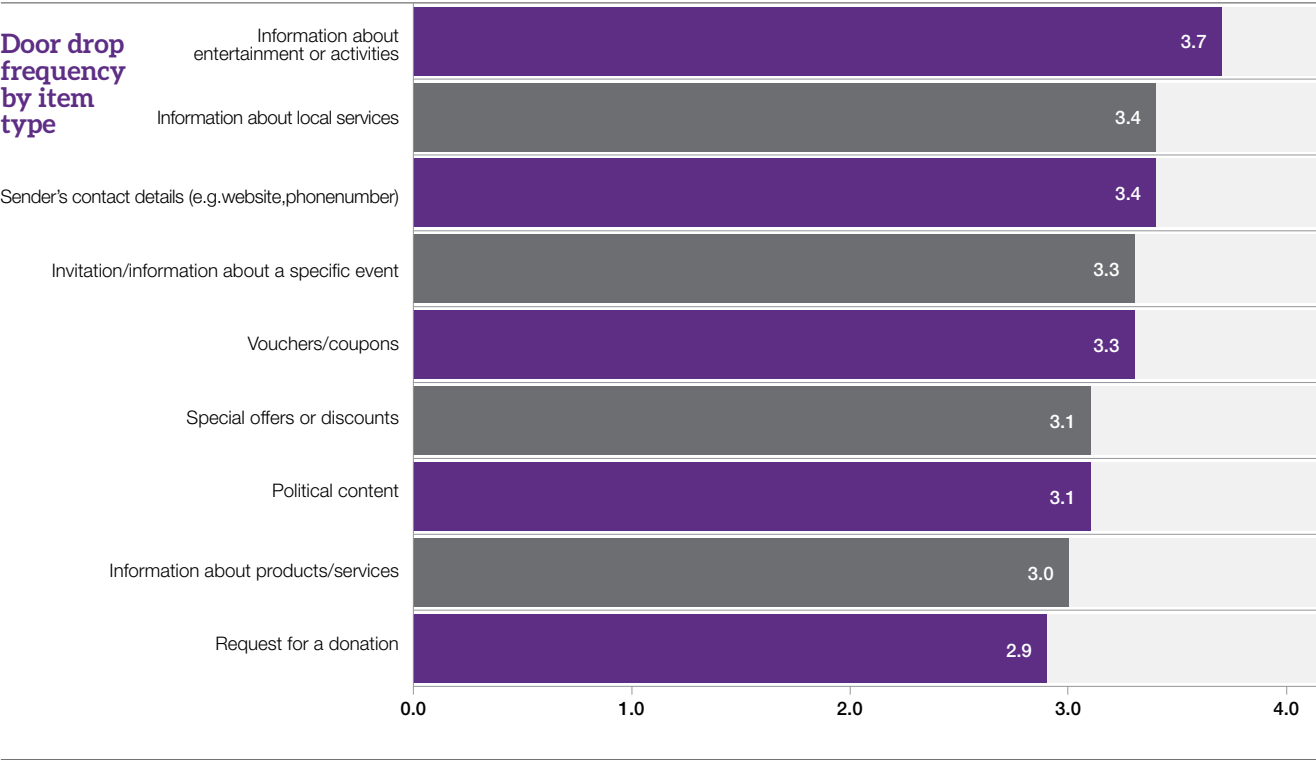|	
Vouchers/coupons	1.1
Information about entertainment or activities	1.1
Invitation/information about a specific event	1.1
Political content	1.1
Information about local services	1.1
Special offers or discounts	1.1
Sender's contact details (e.g.website, phonenumber)	1.1
Information about products/services	1.1
Request for a donation	1.0

0.0   0.5   1.0   1.5

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

What types of door drop are shared in the home?

Reach by door drop type has a fairly consistent pattern across all types of content.
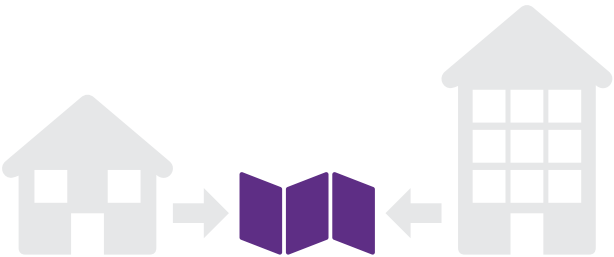
What do consumers do with their door drops?

Door drop frequency by item type

| Item type	Value
Information about entertainment or activities	3.7
Information about local services	3.4
Sender's contact details (e.g.website,phonenumber)	3.4
Invitation/information about a specific event	3.3
Vouchers/coupons	3.3
Special offers or discounts	3.1
Political content	3.1
Information about products/services	3.0
Request for a donation	2.9

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

What types of door drop are revisited most often?

The top ranking frequency is for information about entertainment or activities. Information about local services and details about the sender and how to reach them closely follow.

Door drop item reach by social grade

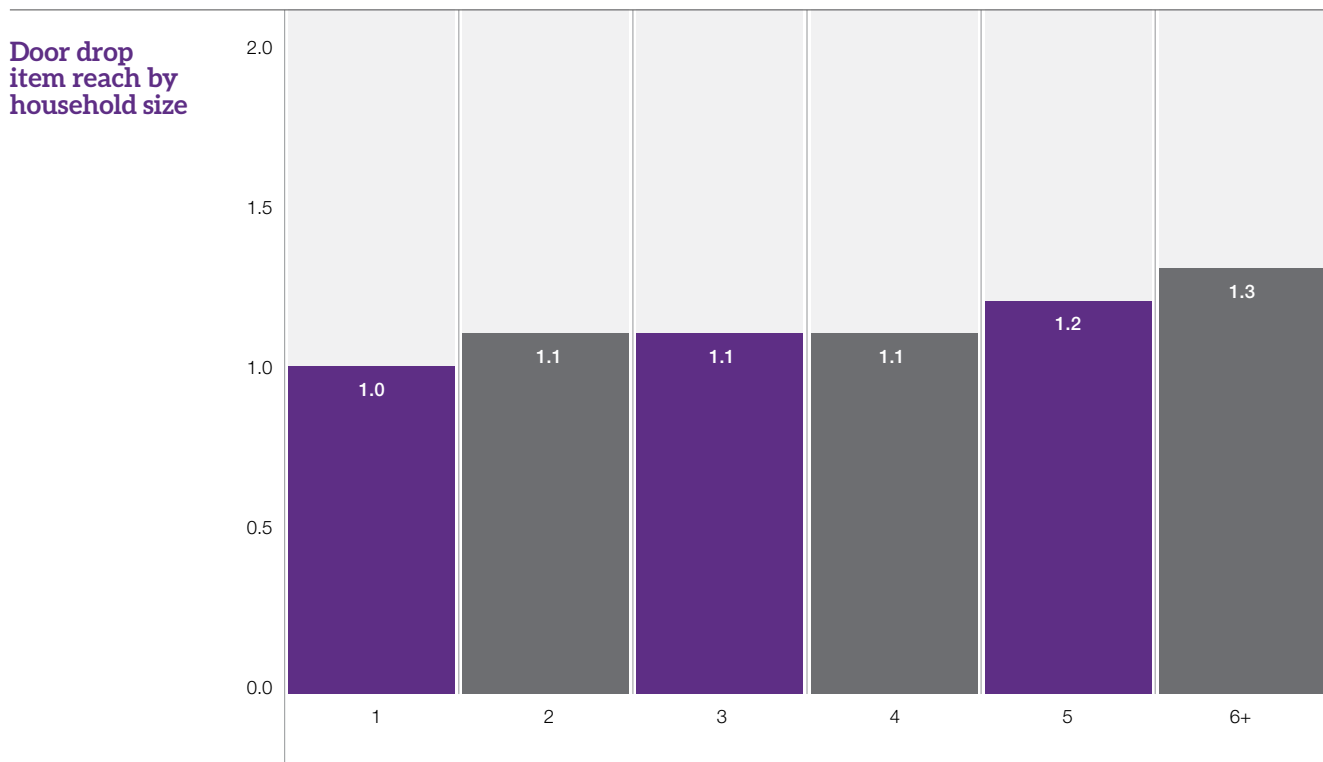|				
2.0				
1.5				
1.0 — 1.1	1.1	1.1	1.1	1.1
0.5				
0				
A	B	C1	C2	DE
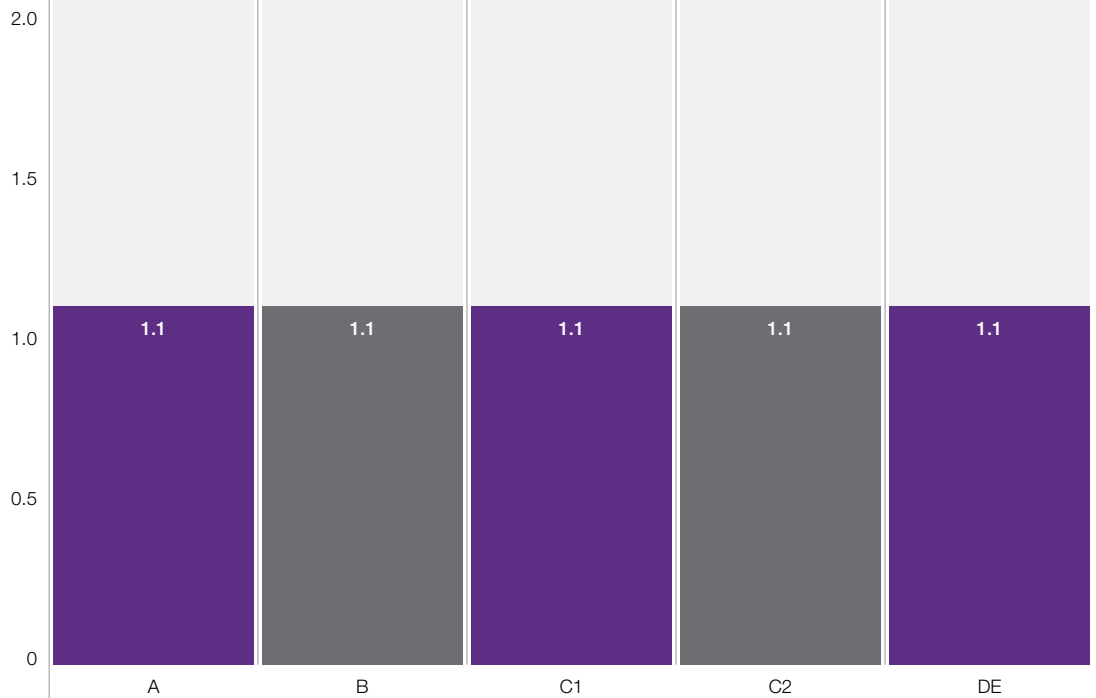
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

Which types of households share door drop?

Door drop item reach by social grade is consistent across ABC1, C2 and DE.

What do consumers do with their door drops?

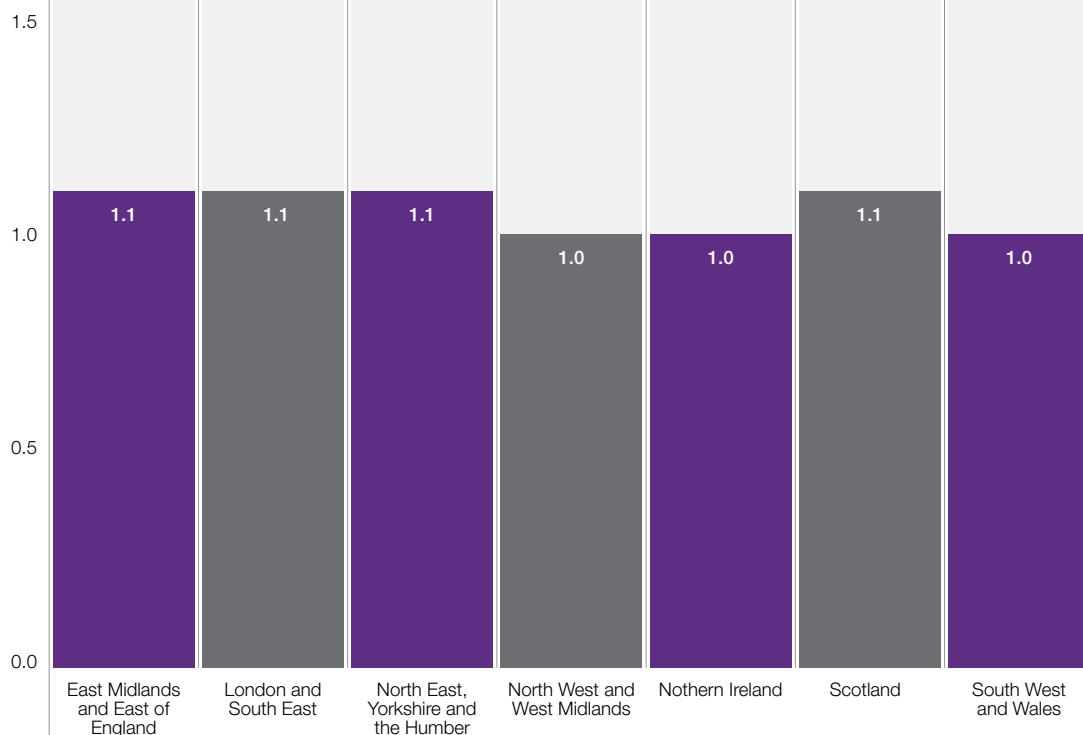**Door drop item reach by household size**

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

Does the household size affect reach?

Item reach by household size is consistent across most households showing a slightly higher reach in those households with more people in them and lower where there is only one occupant.

Door drop reach by region

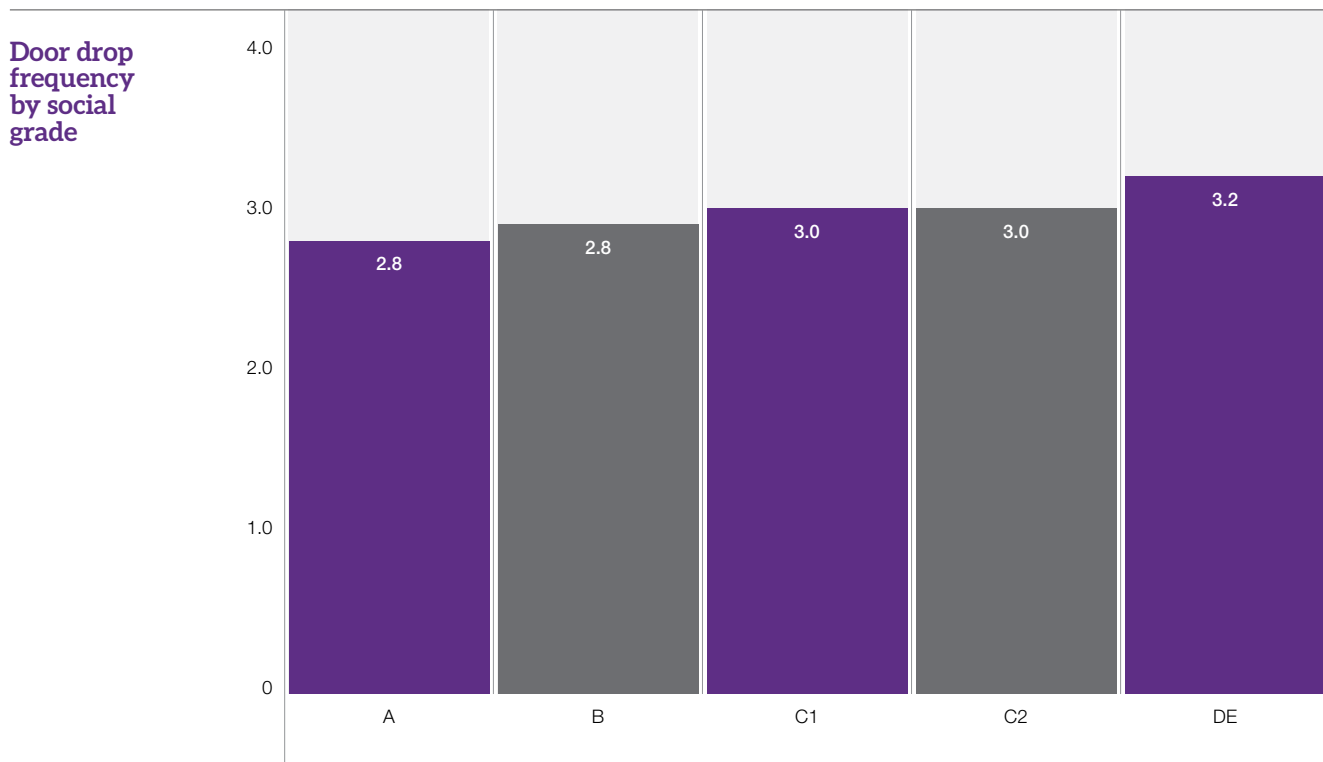|	East Midlands and East of England	London and South East	North East, Yorkshire and the Humber	North West and West Midlands	Nothern Ireland	Scotland	South West and Wales
Reach	1.1	1.1	1.1	1.0	1.0	1.1	1.0

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

Are there regional differences for reach?

Item reach by region, again shows a consistent pattern but there are three regions that have a lower reach of 1 – the North West and West Midlands, Northern Ireland and South West and Wales.

What do consumers do with their door drops?

Door drop frequency by social grade

Social grade	Value
A	2.8
B	2.8
C1	3.0
C2	3.0
DE	3.2

Which types of households revisit door drop?

Echoing addressed mail, it would appear that those in higher socio-economic groups return to door drop less frequently than those in the lower ones.

Door drop frequency by household size
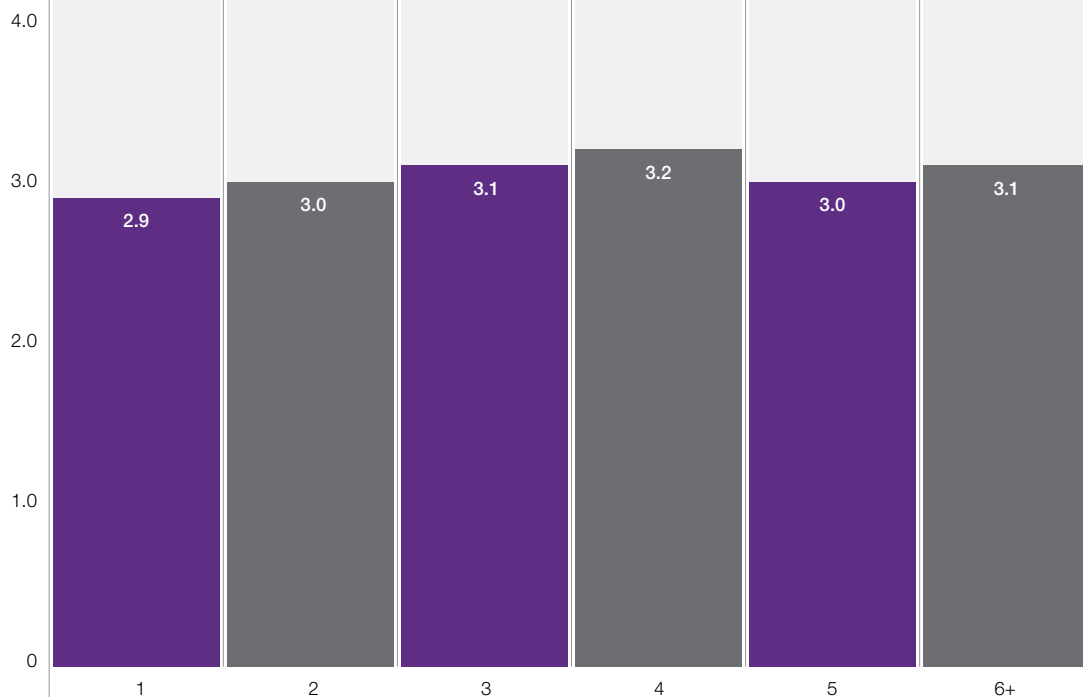
Household size	Frequency
1	2.9
2	3.0
3	3.1
4	3.2
5	3.0
6+	3.1

Does household size affect frequency?

This is the only instance where household size does not seem to have as much of an impact on frequency, with frequency being highest in households comprising four people. And where there is only one person in the household the average times a door drop will be revisited is 2.9.
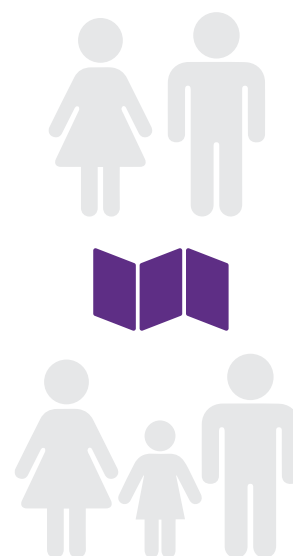
What do consumers do with their door drops?

Door drop frequency by region
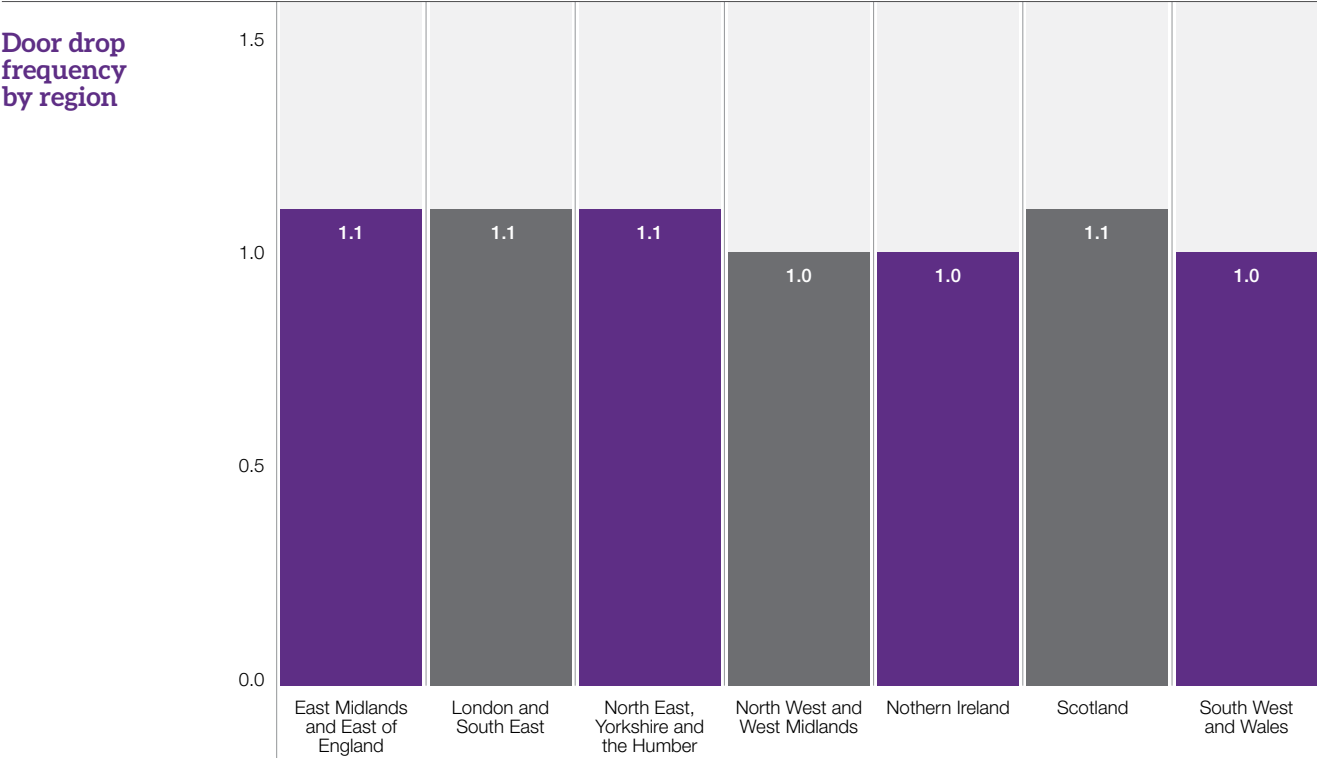
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Door drop items n=4,563

Does door drop frequency differ by region?

Frequency is highest in the North East, Yorkshire and the Humber and lowest in the South West and Wales.

Appendices

Where to find the data?
JICMAIL core survey data

The main JICMAIL survey will be available via industry data bureau planning systems from January 2018; these are Telmar, Nielsen IMS and Kantar Choices.

Two JICMAIL databases will be accessible enabling users to run queries to research the following planning scenarios.

Audience level database
How likely are different audiences to be exposed to different types of mail? What types of mail are different audiences interacting with and at what frequency?

Item level database
What is the reach and frequency of each addressed mail or door drop at a household level.

JICMAIL campaign scheduler

Following the launch of the core survey, JICMAIL campaign scheduling functionality will be introduced by Q2 2018 via the main data bureau systems. This will enable users to input mail campaigns of different sizes and for different target audiences to determine reach, frequency and campaign impacts.

JICMAIL website

Key audience and household level data is also available via downloadable data tables and presentations via the JICMAIL website – www.jicmail.org.uk.

What do consumers do with their business mail?

Whilst our establishment survey and continuous diary set about to capture the reach and frequency for advertising mail, comprising addressed mail and door drop, we also knew from all previous research on mail that consumers don't really make a distinction between the different types of mail they receive from brands. At most they might think about it in terms of brands they know sending them things and brands they don't know. We very much wanted to understand the full journey of all mail within the household. So whilst this section is not part of the currency which is fused within all the industry tools, we have included a detailed breakdown here of how the metrics for business mail work in order to aid planners who are working on customer relationship marketing. Our hypothesis being that this will enable brands to map out and maximise their on-going customer communications.

Business mail is any item from any sector but through its contents is classified as business mail.

This includes the following items

Financial statement/bill/ update

News/update/ magazine articles

Administrative information (e.g. account details)

Loyalty reward statement

Notification/ reminder

Appointment related information

Business mail item reach by type of mail
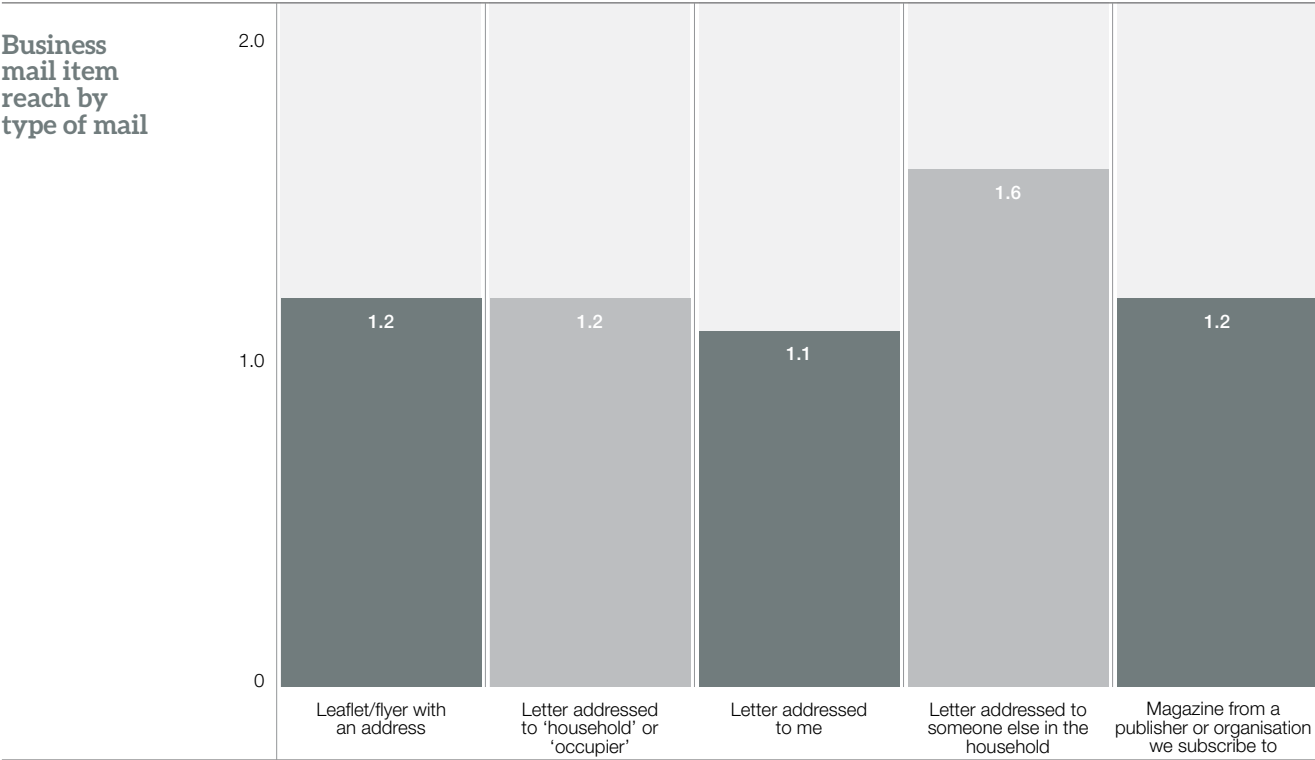
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Business mail items n=6,444

How many individuals see each piece of mail?

Reach for business mail is the highest across all mail categories at an average of 1.2. It is least likely to be shared when the letter is addressed to the household co-ordinator, but still will be shared with a reach of 1.1.

Business mail item frequency by mail type

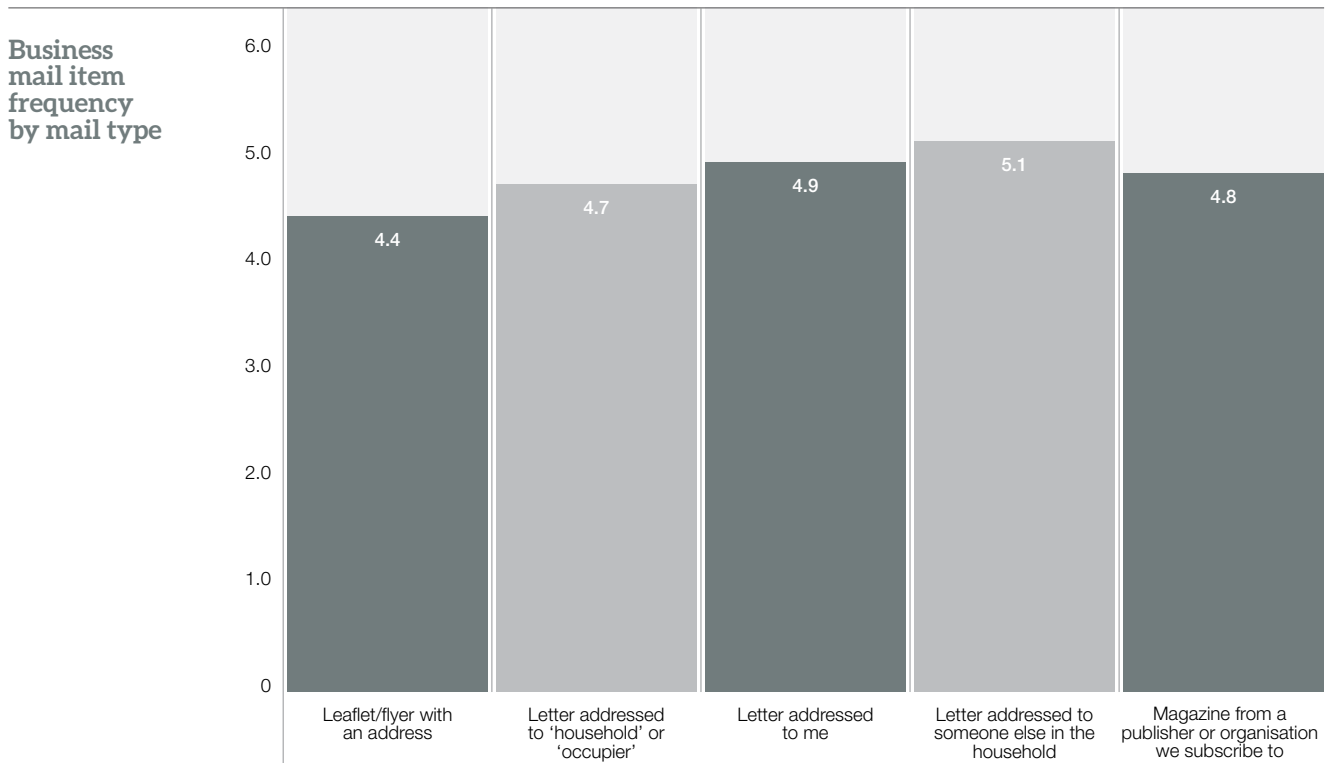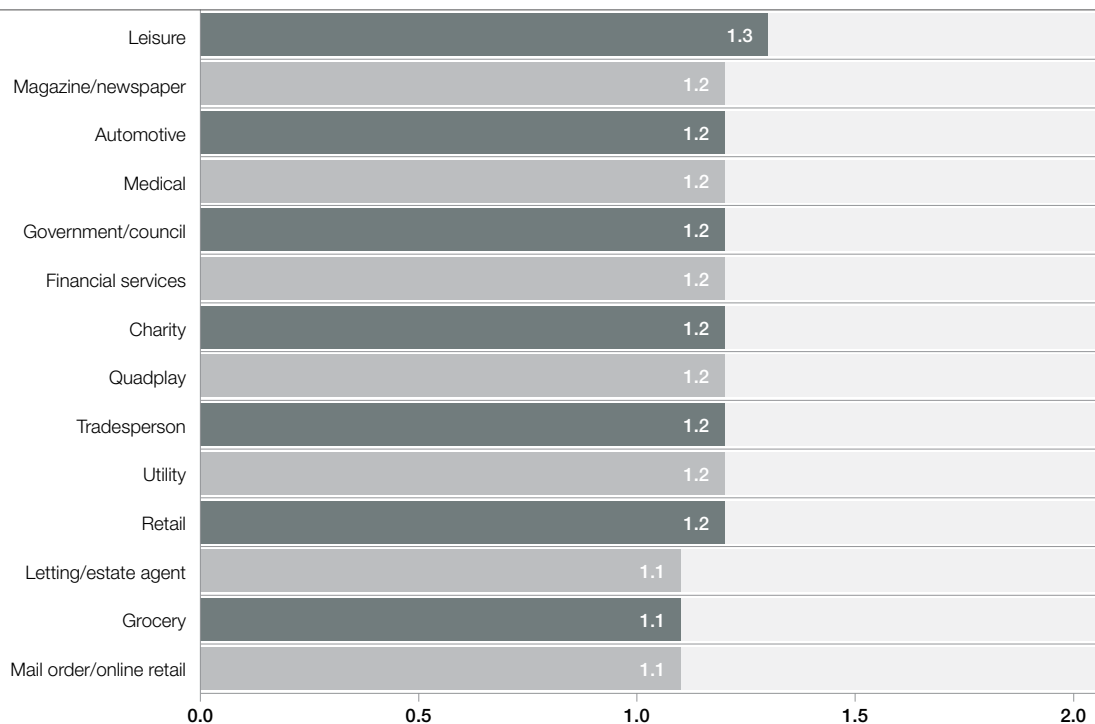| Mail type	Frequency
Leaflet/flyer with an address	4.4
Letter addressed to 'household' or 'occupier'	4.7
Letter addressed to me	4.9
Letter addressed to someone else in the household	5.1
Magazine from a publisher or organisation we subscribe to	4.8

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Business mail items n=6,444

How many times is business mail re-visited?

Frequency is highest in those categories where it is personally addressed either to the household co-ordinator or to someone else in the house the household co-ordinator then passes it on to. This is consistent with addressed mail but higher in business mail overall.

Business mail item reach by sender

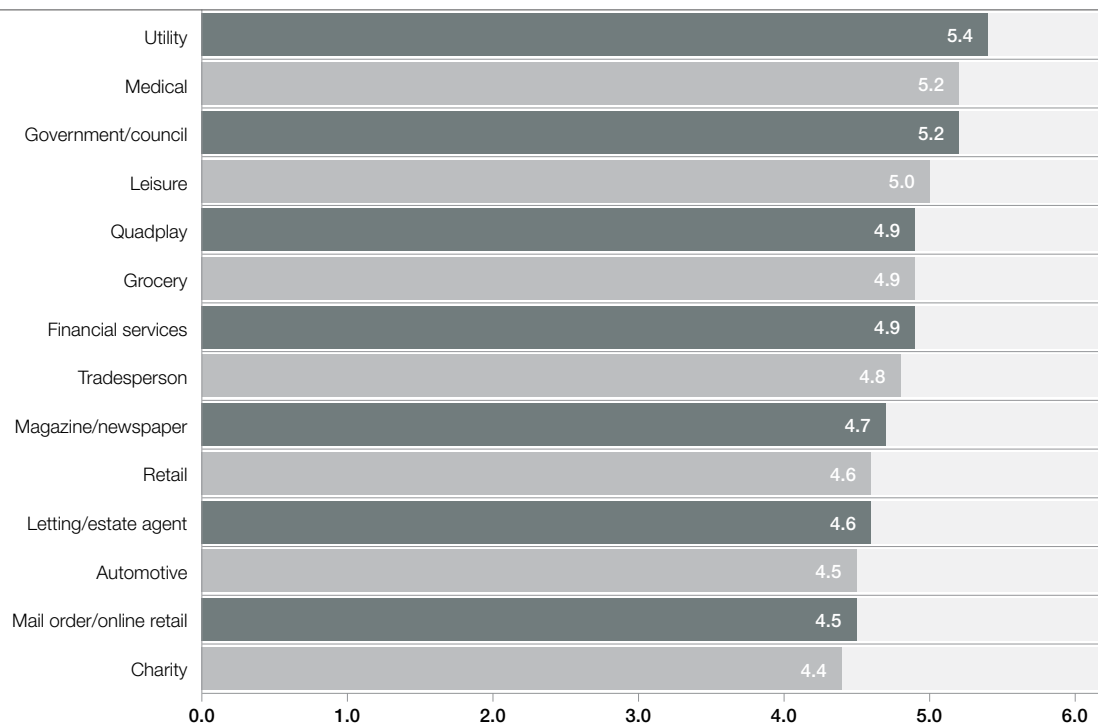|	
Leisure	1.3
Magazine/newspaper	1.2
Automotive	1.2
Medical	1.2
Government/council	1.2
Financial services	1.2
Charity	1.2
Quadplay	1.2
Tradesperson	1.2
Utility	1.2
Retail	1.2
Letting/estate agent	1.1
Grocery	1.1
Mail order/online retail	1.1

0.0   0.5   1.0   1.5   2.0

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Business mail items n=6,444

What types of business mail are shared in the home?

Business mail has a consistent reach of between 1.1 and 1.3 across key sectors like Travel/tourism/ attractions (Leisure), Magazines, Automotive, Medical, Government, Financial Services.
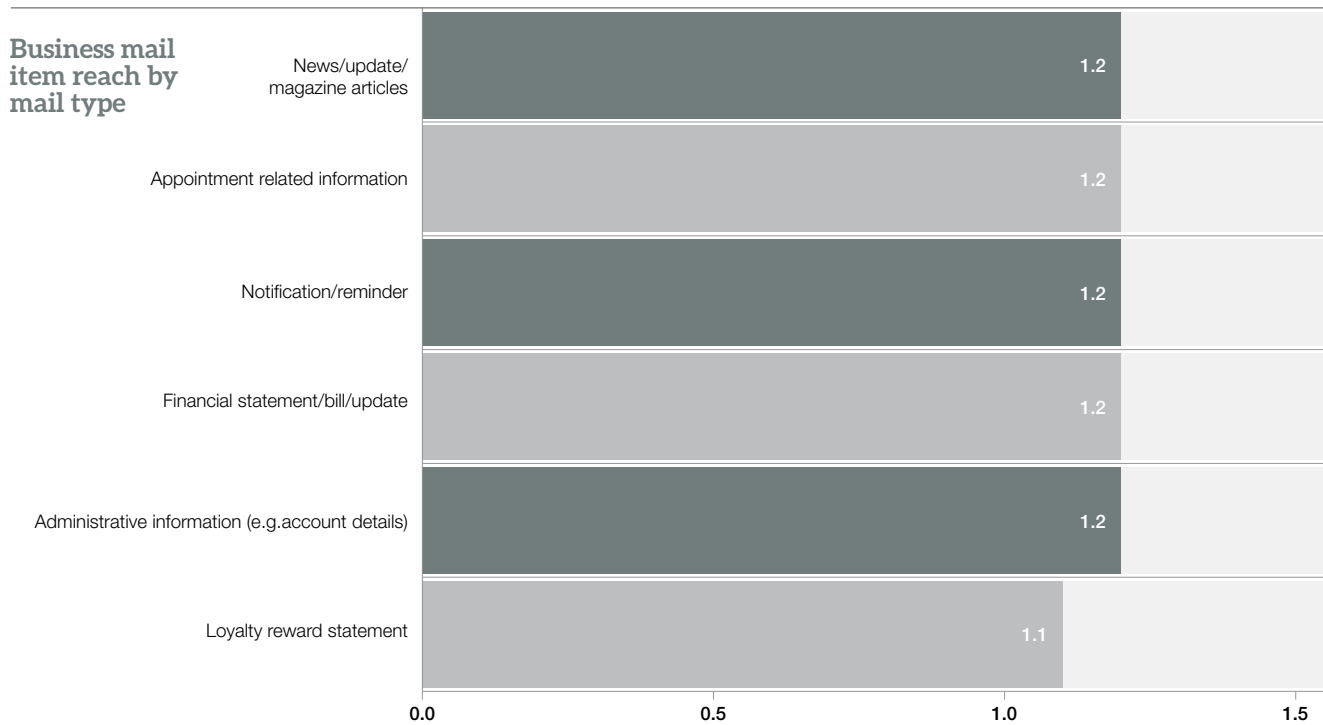
Business mail frequency by sender

Sender	Frequency
Utility	5.4
Medical	5.2
Government/council	5.2
Leisure	5.0
Quadplay	4.9
Grocery	4.9
Financial services	4.9
Tradesperson	4.8
Magazine/newspaper	4.7
Retail	4.6
Letting/estate agent	4.6
Automotive	4.5
Mail order/online retail	4.5
Charity	4.4

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Business mail items n=6,444

What types of business mail are re-visited?

Business mail frequency is highest for Utilities at 5.4, followed by Medical and Government/Council information. But business mail has a consistently high frequency across all sectors. This is information consumers are returning to again and again.
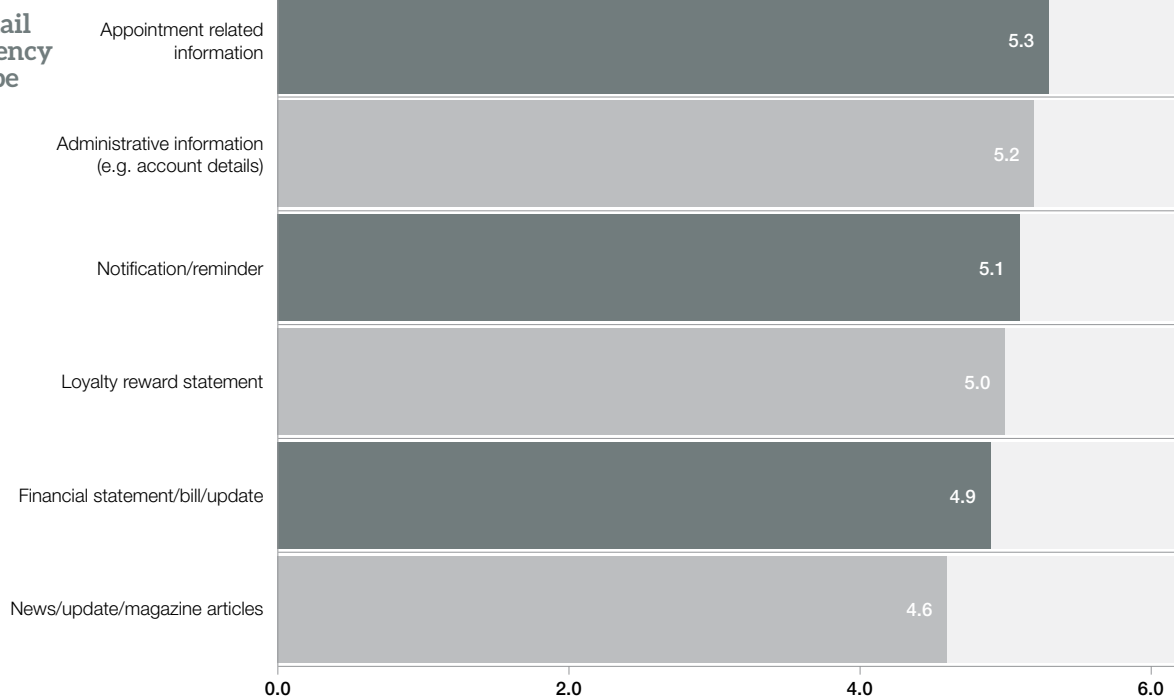
Business mail item reach by mail type

Mail type	Reach
News/update/magazine articles	1.2
Appointment related information	1.2
Notification/reminder	1.2
Financial statement/bill/update	1.2
Administrative information (e.g.account details)	1.2
Loyalty reward statement	1.1

0.0   0.5   1.0   1.5

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Business mail items n=6,444

What types of business mail are shared?

Reach is fairly consistent across all the types of content that people receive.

Business mail item frequency by mail type

Mail type	Frequency
Appointment related information	5.3
Administrative information (e.g. account details)	5.2
Notification/reminder	5.1
Loyalty reward statement	5.0
Financial statement/bill/update	4.9
News/update/magazine articles	4.6

0.0   2.0   4.0   6.0

Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Business mail items n=6,444

What type of business mail content is re-visited?

People return to appointment related information 5.3 times, to administrative information 5.2 times and to notifications 5.1 times. Whilst loyalty reward statements don't achieve the highest reach the recipient is revisiting them on average 5 times.
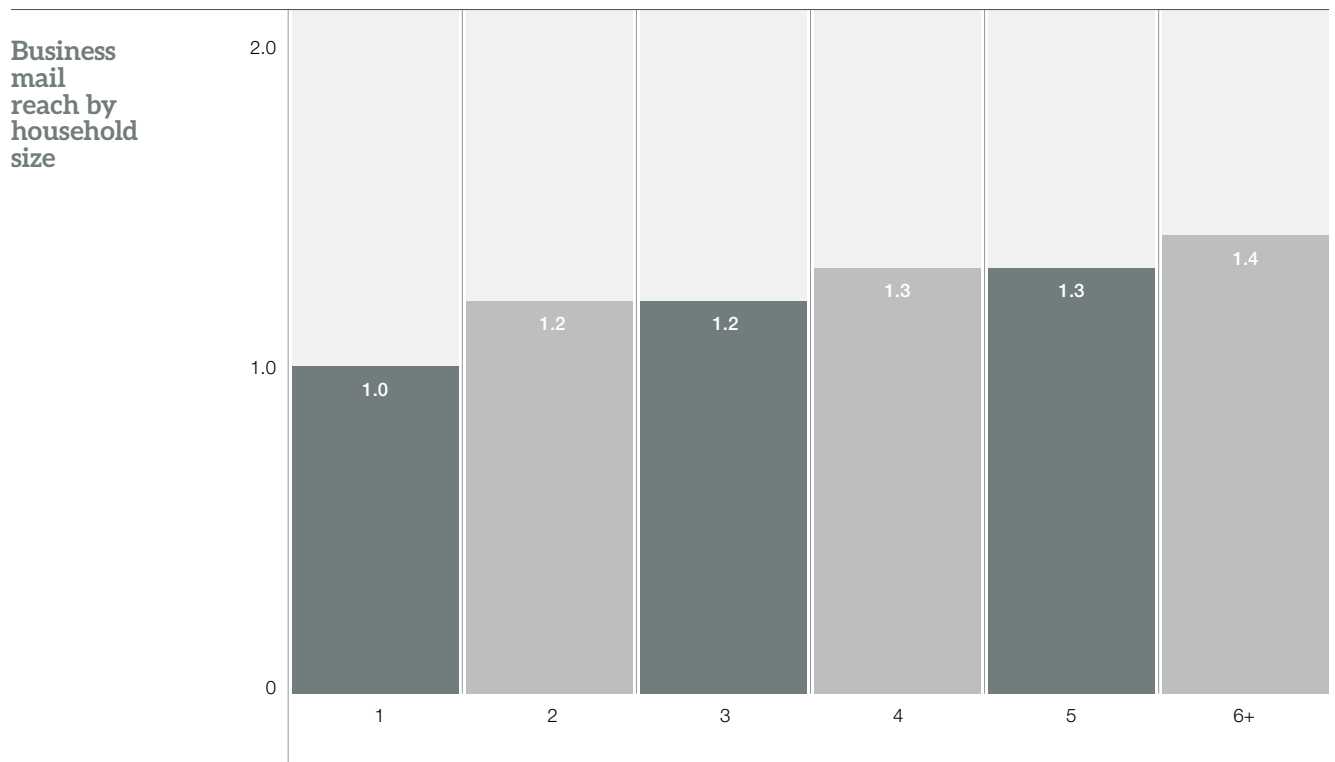
Business mail reach by social grade
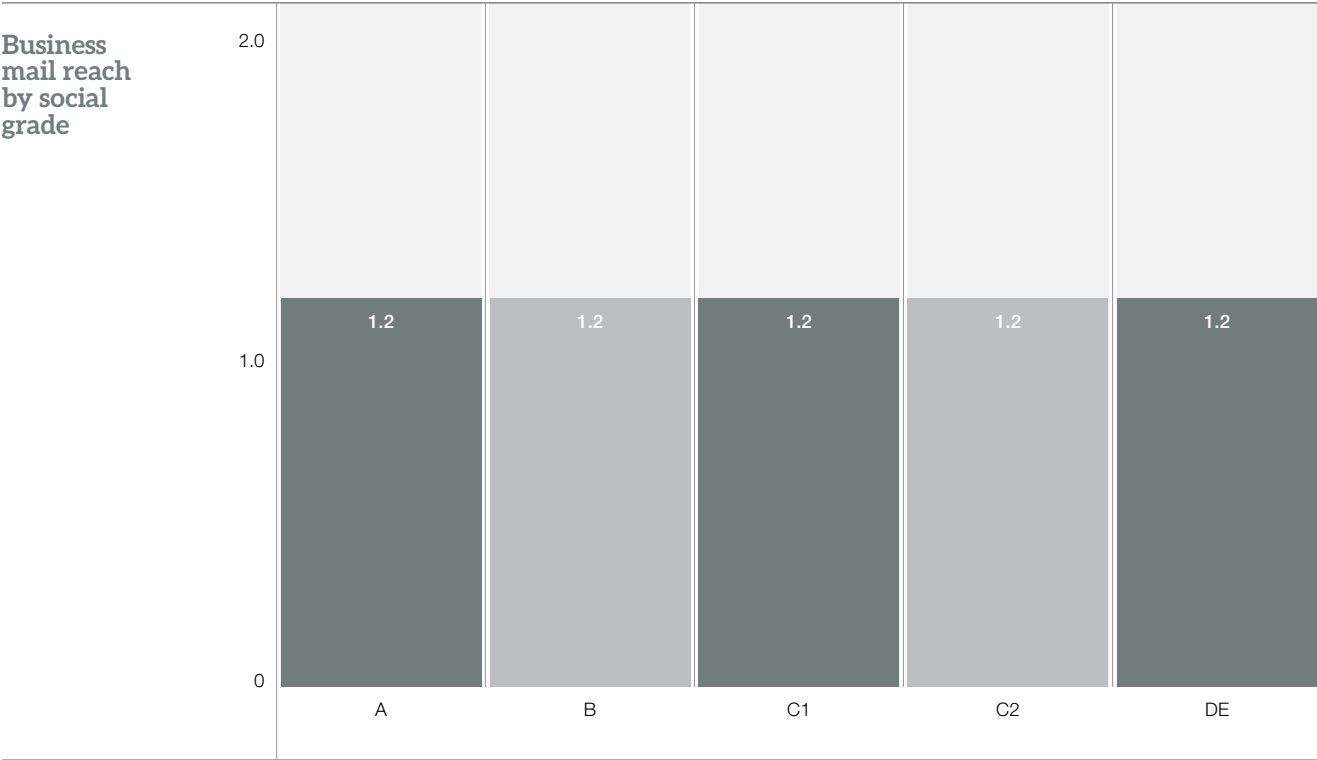
Source: JICMAIL Q2&Q3, Kantar TNS, 2017
Base: Business mail items n=6,444

How is business mail shared in different households?

Business mail is consistently shared at a rate of 20 additional people per hundred mailings sent and this does not vary across the social classes.
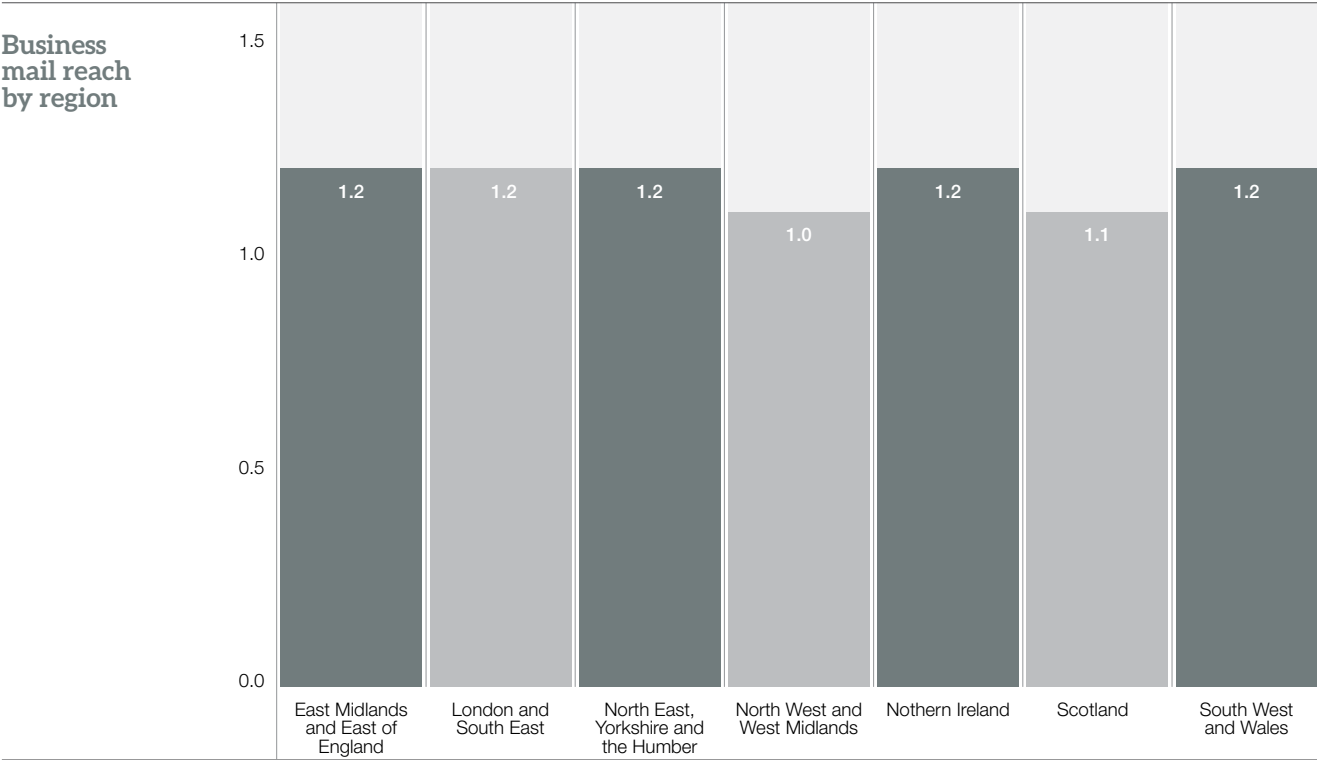
Business mail reach is consistent across all socio-demographic groups.

Business mail reach by household size

|	1	2	3	4	5	6+
	1.0	1.2	1.2	1.3	1.3	1.4

How does household size affect business mail reach?

Again we see a fairly consistent pattern for item reach, which increases slightly the larger the household.

Business mail reach by region

	East Midlands and East of England	London and South East	North East, Yorkshire and the Humber	North West and West Midlands	Nothern Ireland	Scotland	South West and Wales
	1.2	1.2	1.2	1.0	1.2	1.1	1.2

Source: JICMAIL Q2+Q3 2017.
Base: Business mail items n=6,444

Does region affect business mail reach?

We see a consistent pattern again for reach by region of between 1.1 and 1.2.

Business mail frequency by social grade

Social Grade	Value
A	4.6
B	5.3
C1	5.4
C2	6.2
DE	5.7
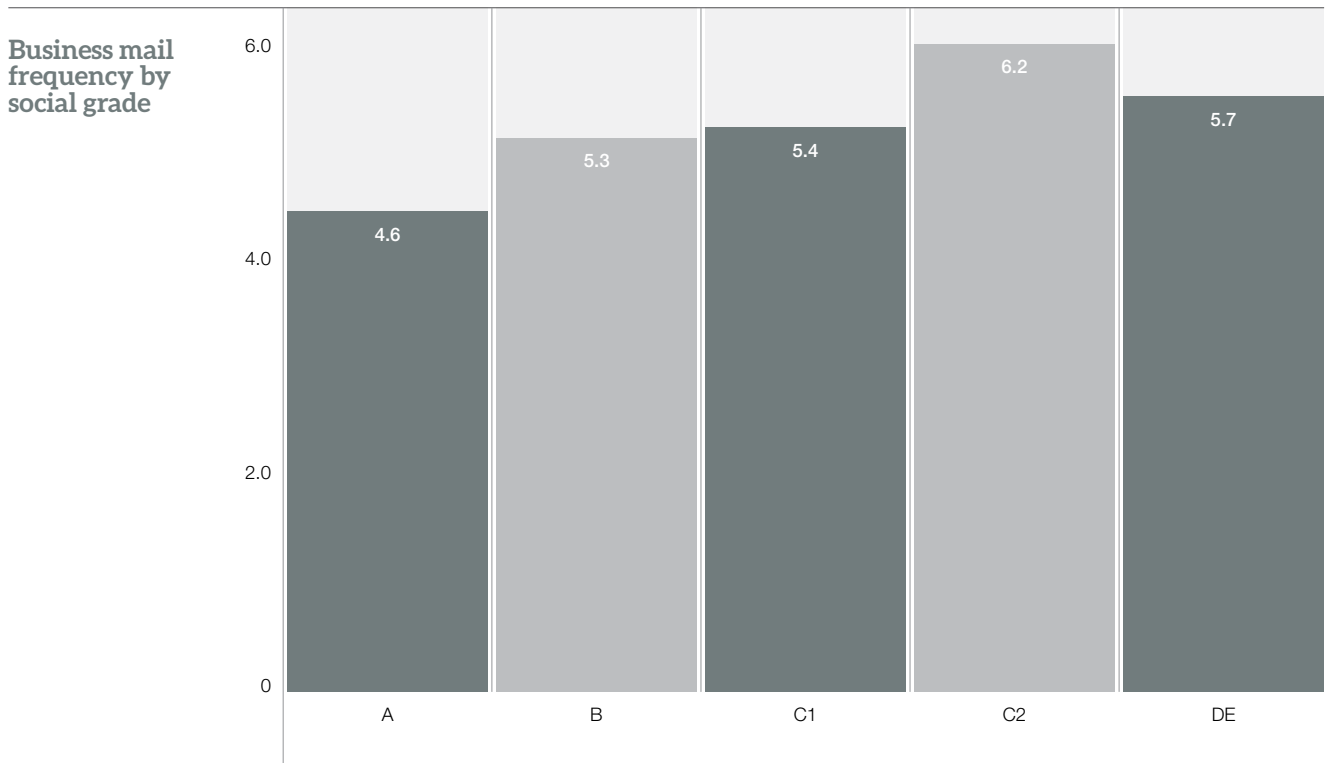
Source: JICMAIL Q2+Q3 2017.
Base: Business mail items n=6,444

Does business mail frequency change by social grade?

Business mail frequency is lower amongst the most affluent and highest amongst C2s.

Business mail frequency by household size

6.0

4.9   5.8   5.5   5.4   5.3   5.7

4.0

2.0

0

1   2   3   4   5   6+
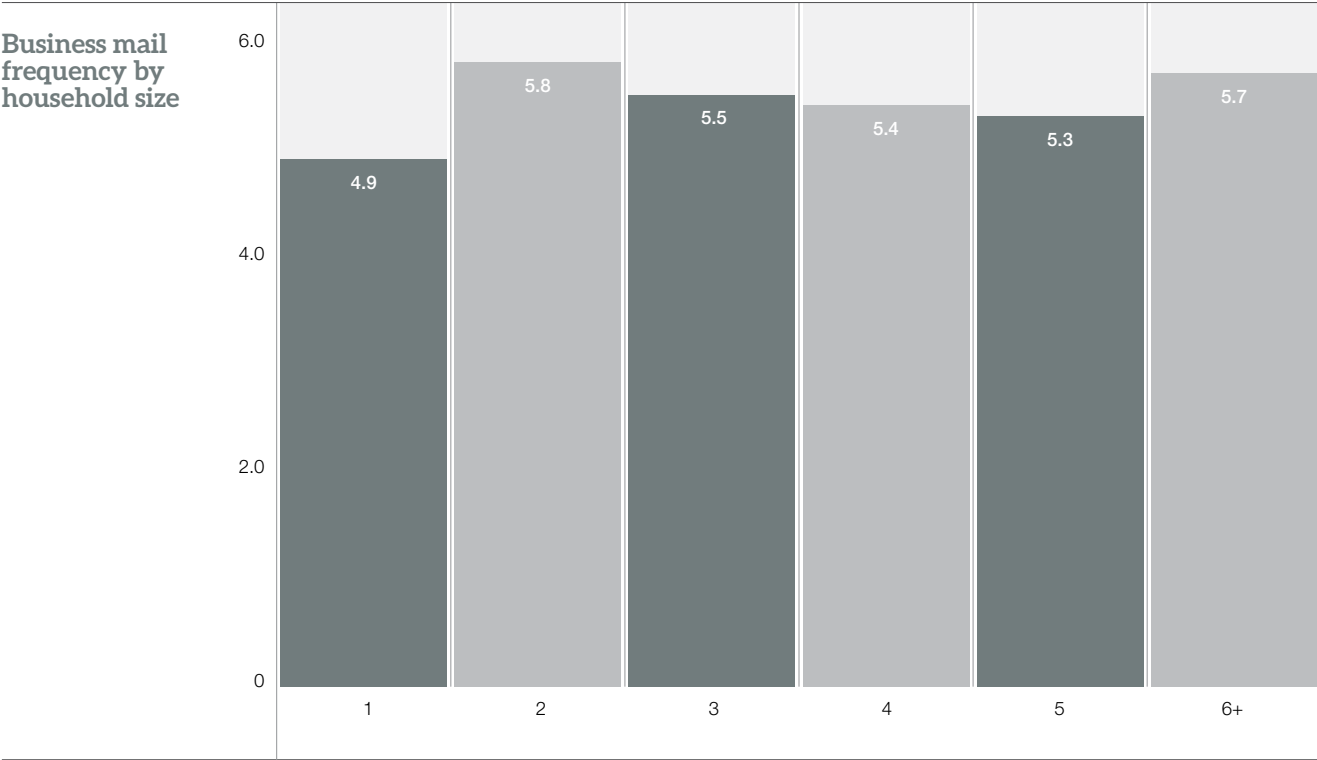
Source: JICMAIL Q2+Q3 2017.
Base: Business mail items n=6,444

Does business mail frequency vary by household size?

Frequency peaks at 5.8 for 2 people households which are mainly made up of couples with no children. Again it is high also in those households with 6+ people.

www.jicmail.org.uk

Mail Media Metrics

JiC
MAIL

Mail Media Metrics

70 Margaret Street, London, W1W 8SS