JICMAIL
Attention Pilot Study
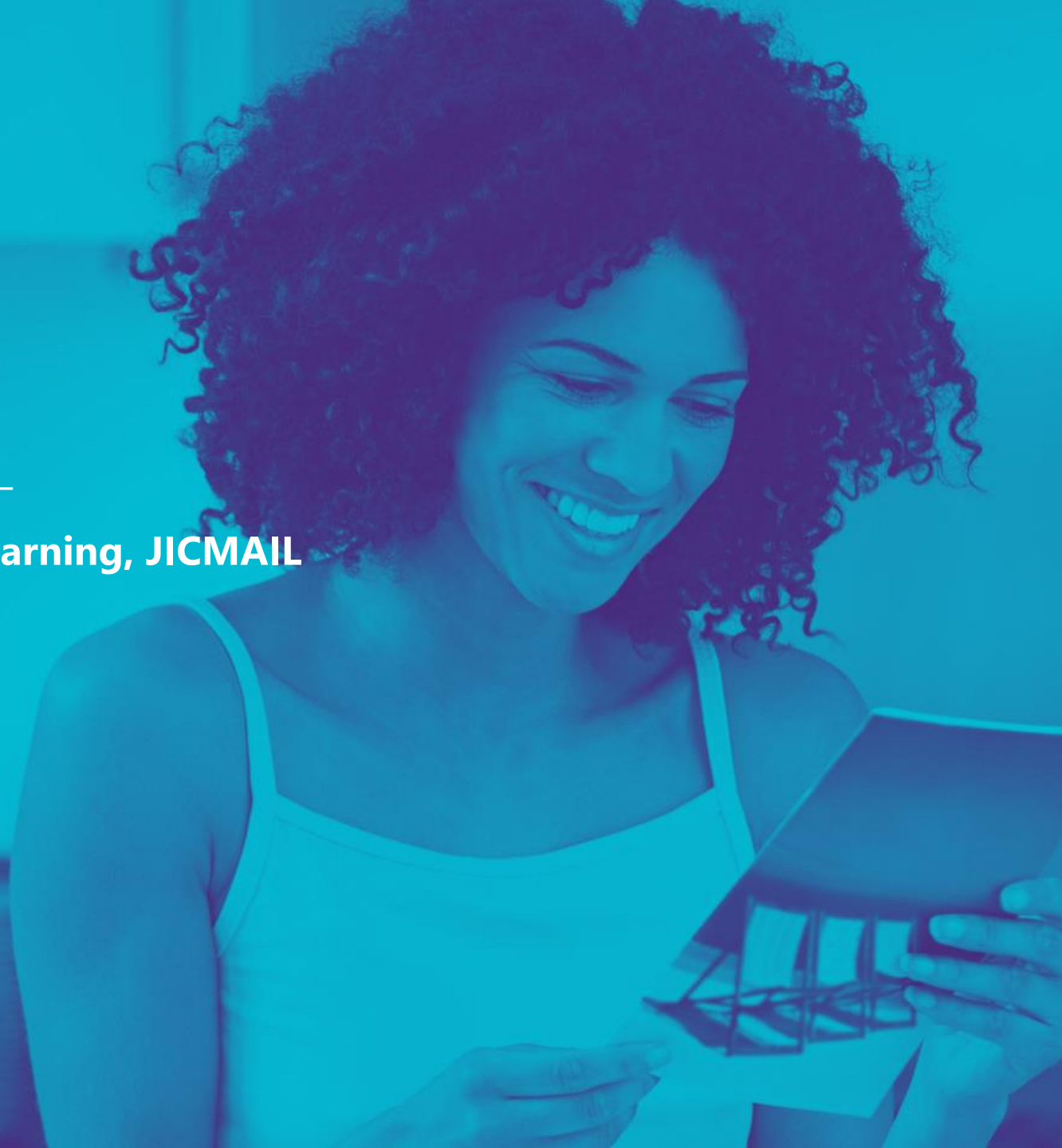
Ian Gibbs - Director of Data Leadership and Learning, JICMAIL

Adam Edelshain – Director, PWC

JIC MAIL

Mail Media Metrics

Why attention has come to the fore: because human interaction with ads cannot be assumed

Conversion to eyeballs is in doubt

71% "of digital ads in the UK are 'viewable' i.e. at least half the ad is viewable on screen for at least a second."
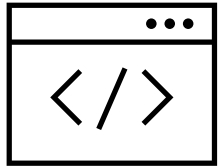
Source: IAS H1 2021 Viewability Benchmarks Report

JIC MAIL
Mail Media Metrics

Even viewable ads aren't being "viewed"

70%
viewability

vs

9%
viewed / fixated upon

JIC MAIL
Mail Media Metrics
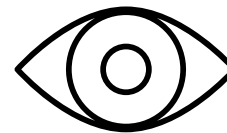
Much of the debate around why attention is important centres around its link to campaign outcomes

Attention linked to…
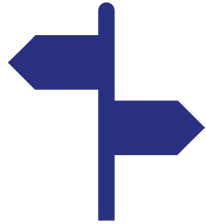
**MENTAL
AVAILABILITY**

**MEMORY
RETENTION**

**BRAND
UPLIFT**

JiC
MAIL
Mail Media Metrics

Mail is shared: **1.13** people per household

Mail is **live in the home for a week** on average

The **ad** *is* the **medium**

Response to mail is high: **31% prompts a commercial action**

JIC MAIL
Mail Media Metrics

JICMAIL's attention measurement roadmap

pilot

roll-out

quality assurance

Q3 2022

Q4 2022

Q4 2022

Q4 2022 / Q1 2023

Pilot diary-based collection of time spent data on JICMAIL panel for one month

Validate results through passively observed mail interaction data

Roll-out diary based diary based data collection on an ongoing basis

Create attention-cross platform cost comparisons

self-reported

observed

self-reported

cross-platform data

single-source & scalable

AI video analytics

Discovery integration

external validation

KANTAR

In-home video analytics

KANTAR

pwc

JICMAIL's attention measurement roadmap

Half of the JICMAIL panel selected at random to take part in June pilot study

Removing outliers has a greater impact on Business Mail than on Door Drops

Time spent with average mail item across 28 days (seconds)

	Business	Addressed advertising	Partially Addressed	Door drops
Overall	173.9	120.6	68.0	38.5
Outliers Removed	100.8	78.2	61.8	30.9

■ Overall ■ Outliers Removed

Source: JICMAIL / Kantar attention pilot study June 2022.
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023
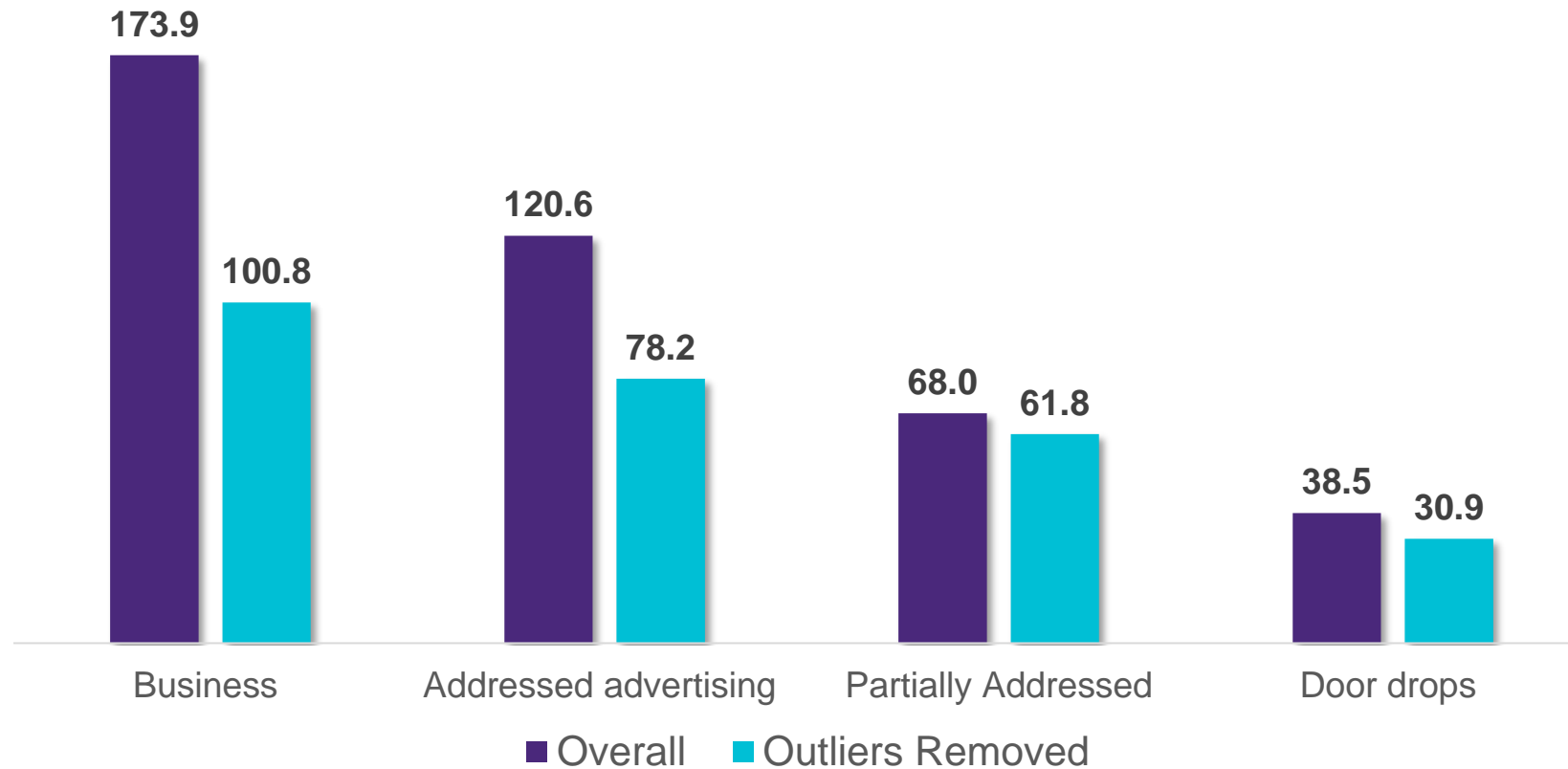
A lot of time is spent with government and medical DM

Time spent with **Direct Mail** by sector (outliers removed – seconds)

Sector	Seconds
Government/council	119
Medical	112
Mail order/online retailer	88
Financial	84
Travel	72
Retailer	62
Charity	57
Telecoms	43

JIC MAIL
Mail Media Metrics

Source: JICMAIL / Kantar attention pilot study June 2022.
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023
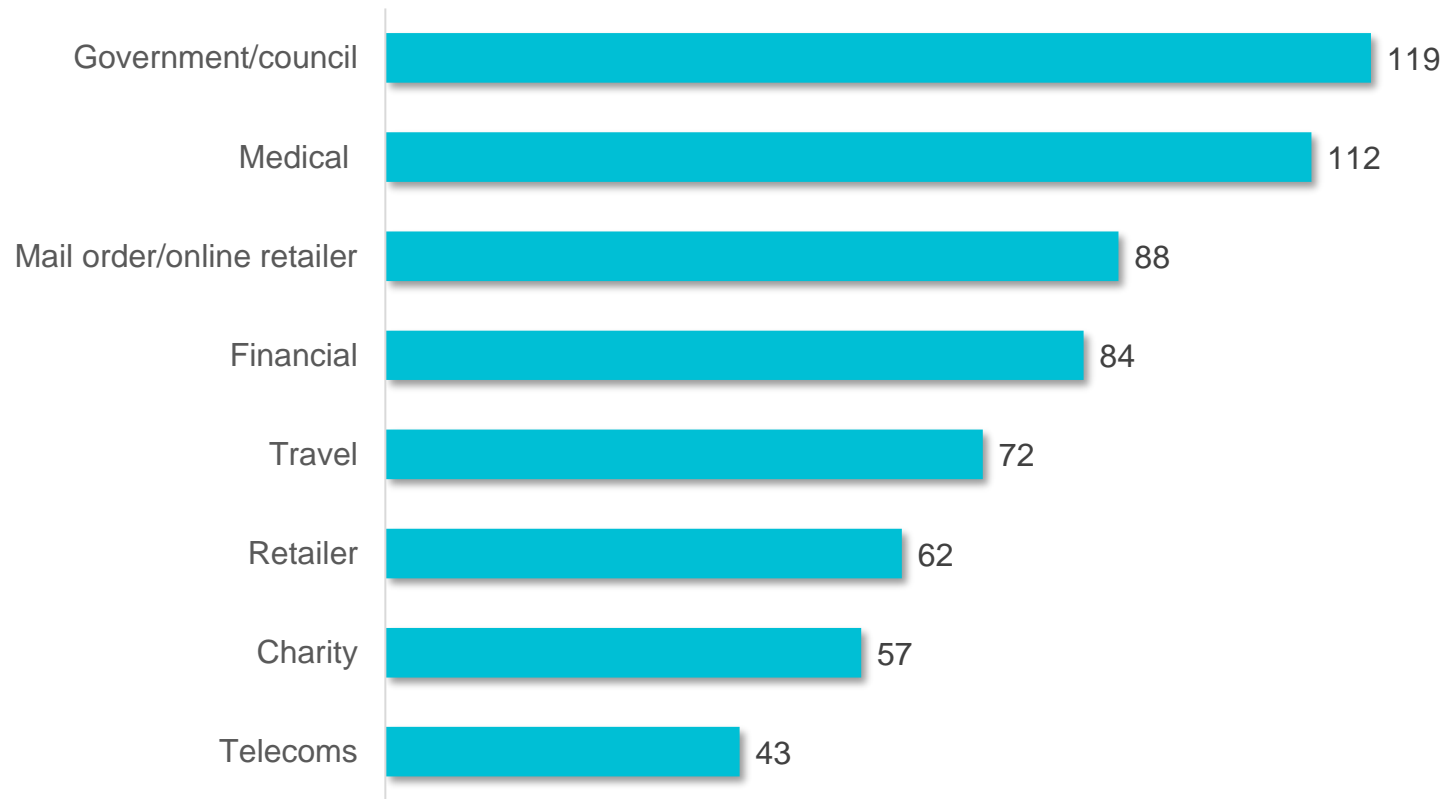
Bills and appointment related content record high attention

Time spent with **Direct Mail** by sector (outliers removed – seconds)
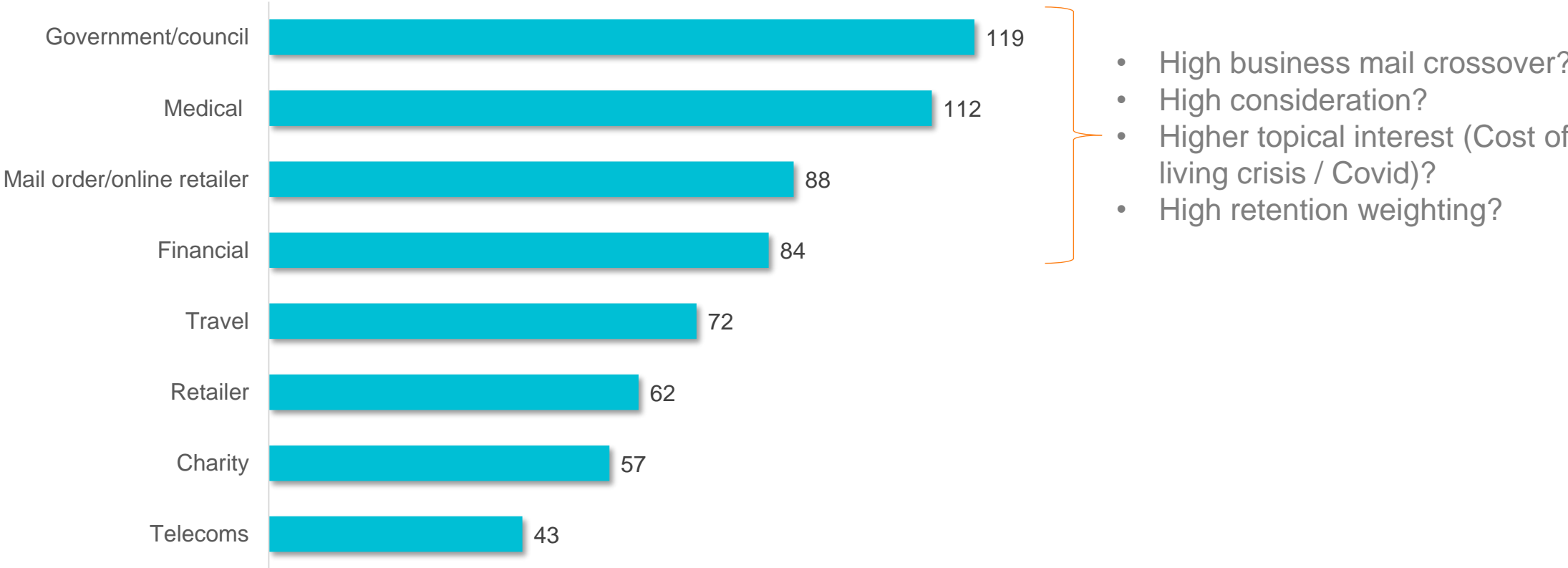
Sector	Seconds
Government/council	119
Medical	112
Mail order/online retailer	88
Financial	84
Travel	72
Retailer	62
Charity	57
Telecoms	43

- High business mail crossover?
- High consideration?
- Higher topical interest (Cost of living crisis / Covid)?
- High retention weighting?

Source: JICMAIL / Kantar attention pilot study June 2022.
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023

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Mail Media Metrics

Charity and grocer Door Drops record the highest attention

Time spent with **Door Drops** by sector (outliers removed – seconds)

Sector	Seconds
Charity	63
Supermarket	50
Retailer	41
Restaurant or takeaway	25
Mail order/online retailer	22
Medical	21
Local tradesperson	15
Letting or estate agent	14

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Mail Media Metrics

Source: JICMAIL / Kantar attention pilot study June 2022.
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023
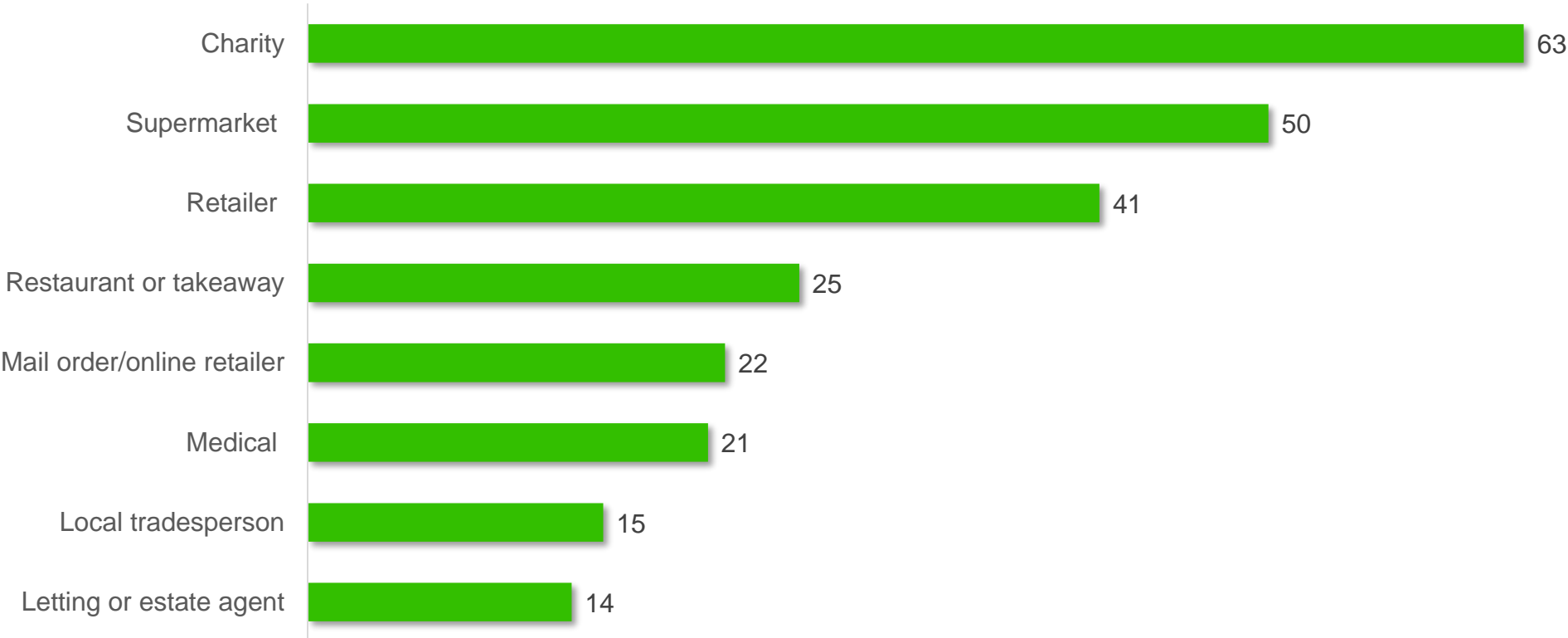
Commercially effective mail over-indexes for attention

Attention for mail items prompting commercial actions
(Index 100 = time spent with average mail item)

Action	Index
Called the sender	219
Visited sender's shop/office	209
Looked up my account details	192
Used a tablet or smartphone	191
Visited sender's website	177
Went online for more information	165
Bought something	148
Discussed with someone	148
Used a voucher	144

Over-indexes for offline actions

Over-indexes for digital actions

Over-indexes for purchase and word of mouth

JIC MAIL
Mail Media Metrics

Source: JICMAIL / Kantar attention pilot study June 2022.
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023
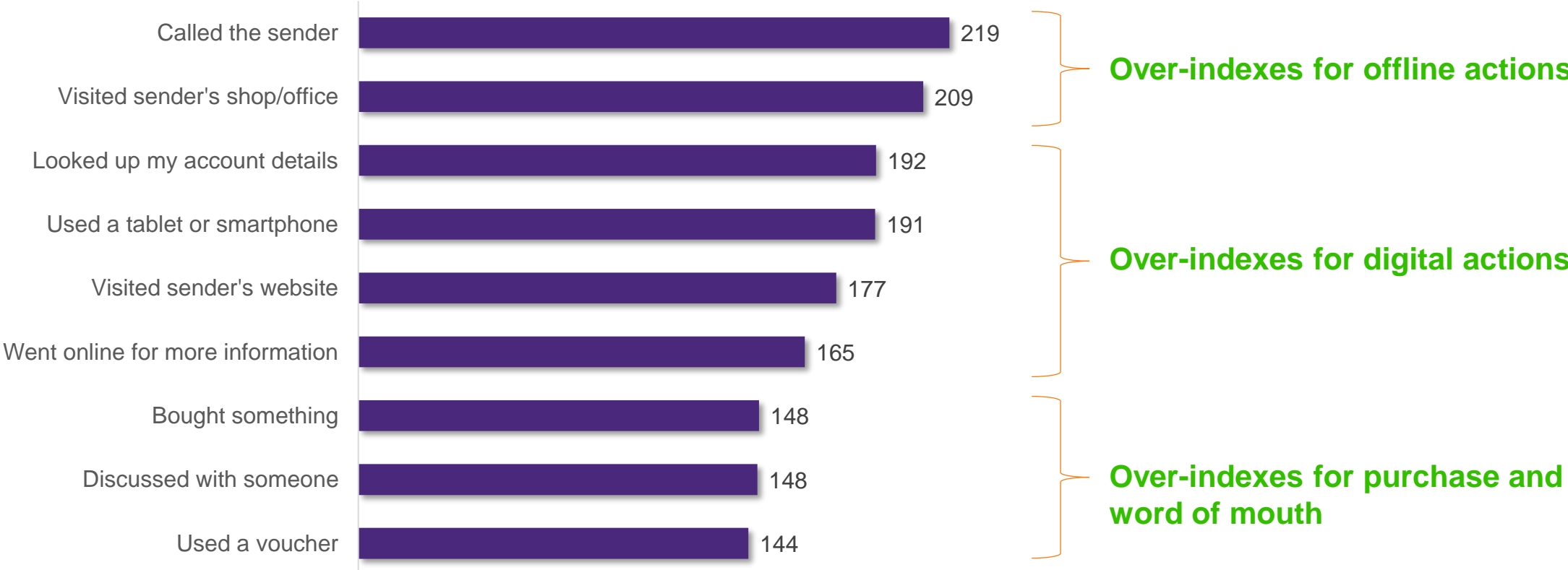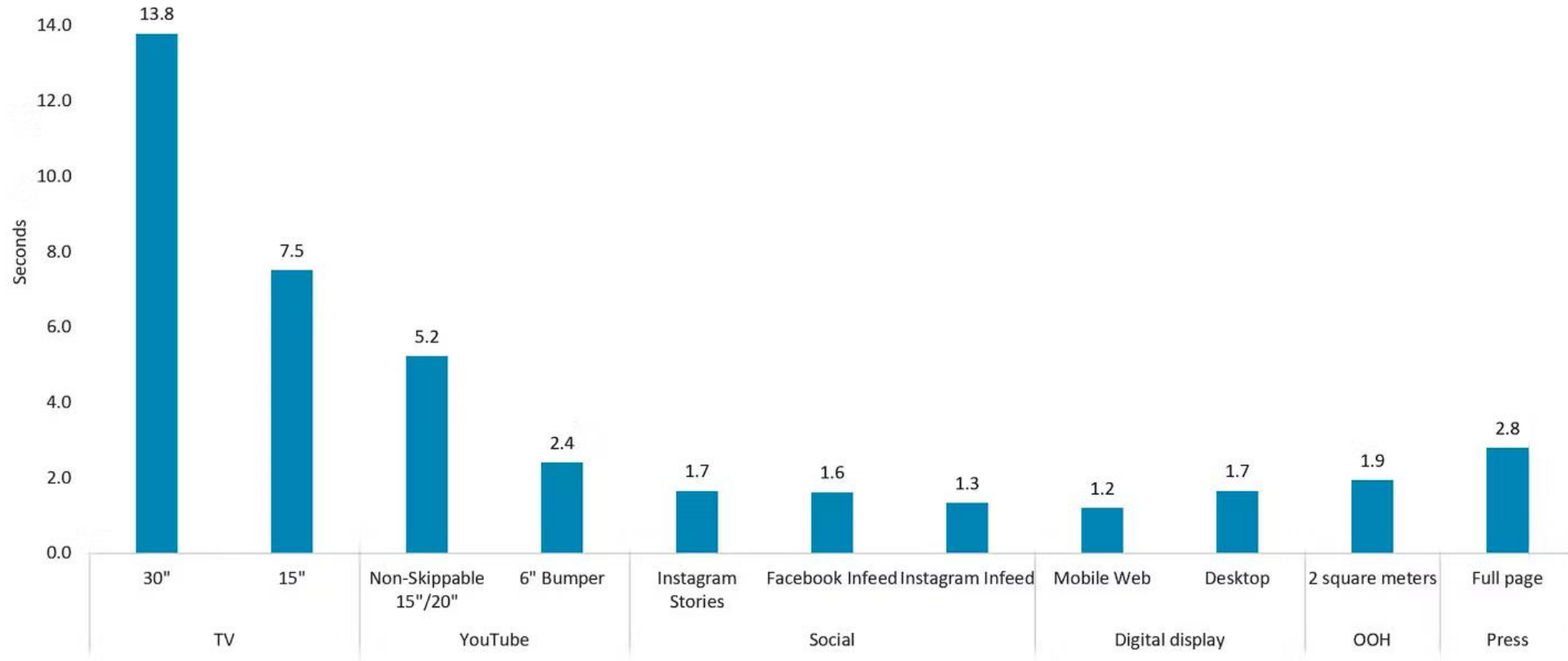
How does mail attention stack up against other media?

T>>VISION INSIGHTS   LUMEN

Factoring attention in to media planning

	Bought Impressions / Items	CPM
Desktop Display	1,000,000	£3.0
Direct Mail	1,000,000	£210.0

Source: JICMAIL / Kantar attention pilot study June 2022.; Lumen; Kite Factory CPM data
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023

Factoring attention in to media planning

	Bought Impressions / Items	CPM	Budget	Viewable / Engaged Impressions	Viewable / Engaged CPM
Desktop Display	1,000,000	£3.0	£3,000	700,000	£4.3
Direct Mail	1,000,000	£210.0	£210,000	4,300,000	£48.8

Source: JICMAIL / Kantar attention pilot study June 2022.; Lumen; Kite Factory CPM data
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023

Factoring attention in to media planning

	Bought Impressions / Items	CPM	Budget	Viewable / Engaged Impressions	Viewable / Engaged CPM	Attention per Item / Impression	Total Time Spent (s)	Cost per minute
Desktop Display	1,000,000	£3.0	£3,000	700,000	£4.3	1.7	1,190,000	£0.15
Direct Mail	1,000,000	£210.0	£210,000	4,300,000	£48.8	78	78,000,000	£0.16

JIC MAIL
Mail Media Metrics

Factoring attention in to media planning

	Bought Impressions / Items	CPM
Social Display	1,000,000	£5.0
Door Drops	1,000,000	£50.0

Source: JICMAIL / Kantar attention pilot study June 2022.; Lumen; Kite Factory CPM data
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023

Factoring attention in to media planning

	Bought Impressions / Items	CPM	Budget	Viewable / Engaged Impressions	Viewable / Engaged CPM
Social Display	1,000,000	£5.0	£5,000	1,000,000	£5.0
Door Drops	1,000,000	£50.0	£50,000	3,200,000	£16.1

Source: JICMAIL / Kantar attention pilot study June 2022.; Lumen; Kite Factory CPM data
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023
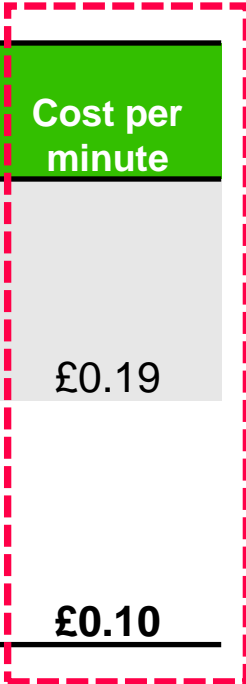
JiC MAIL
Mail Media Metrics
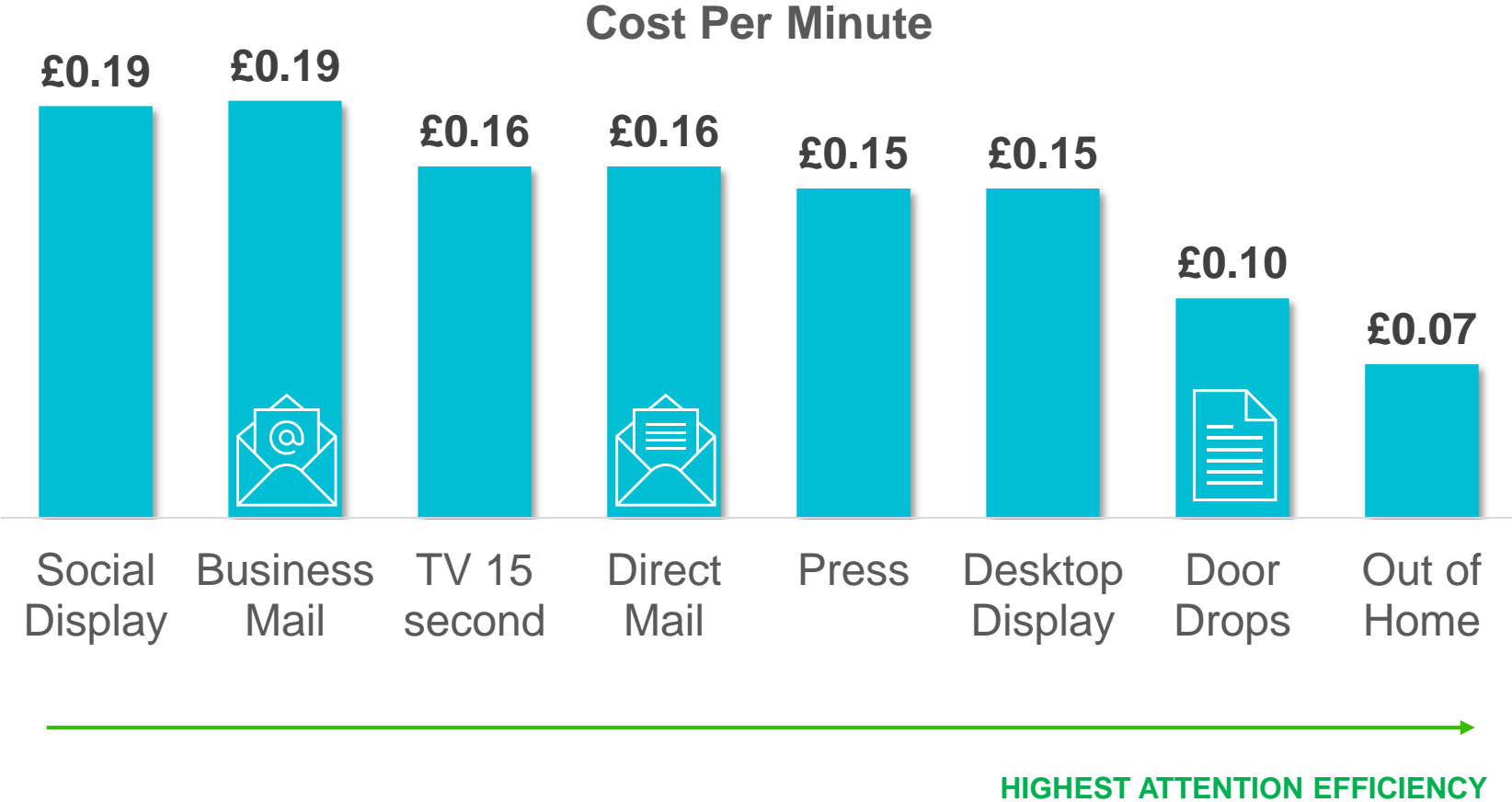
Factoring attention in to media planning

	Bought Impressions / Items	CPM	Budget	Viewable / Engaged Impressions	Viewable / Engaged CPM	Attention per Item / Impression	Total Time Spent (s)	Cost per minute
Social Display	1,000,000	£5.0	£5,000	1,000,000	£5.0	1.6	1,600,000	£0.19
Door Drops	1,000,000	£50.0	£50,000	3,200,000	£16.1	30.9	30,900,000	**£0.10**

Source: JICMAIL / Kantar attention pilot study June 2022.; Lumen; Kite Factory CPM data
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023

JIC MAIL
Mail Media Metrics

Early signs that mail is an attention efficient channel

Cost Per Minute

Social Display	Business Mail	TV 15 second	Direct Mail	Press	Desktop Display	Door Drops	Out of Home
£0.19	£0.19	£0.16	£0.16	£0.15	£0.15	£0.10	£0.07

HIGHEST ATTENTION EFFICIENCY

Source: JICMAIL / Kantar attention pilot study June 2022.; Lumen; TVision; Kite Factory CPM data
Warning: pilot study data only - subject to change in advance of full data release in Q1 2023

Next steps on our roadmap

1. Roll-out mail attention measurement across the **entire panel**, starting with Q4 data collection.

2. Validate results using **in-home video analytics**.

3. Reach consensus on treatment of outliers through technical committee and **industry consultation.**

4. Release **gold-standard** attention metrics in **Spring 2023**

5. Validate methodology with **PWC** as JICMAIL's **quality assurance** partner.