

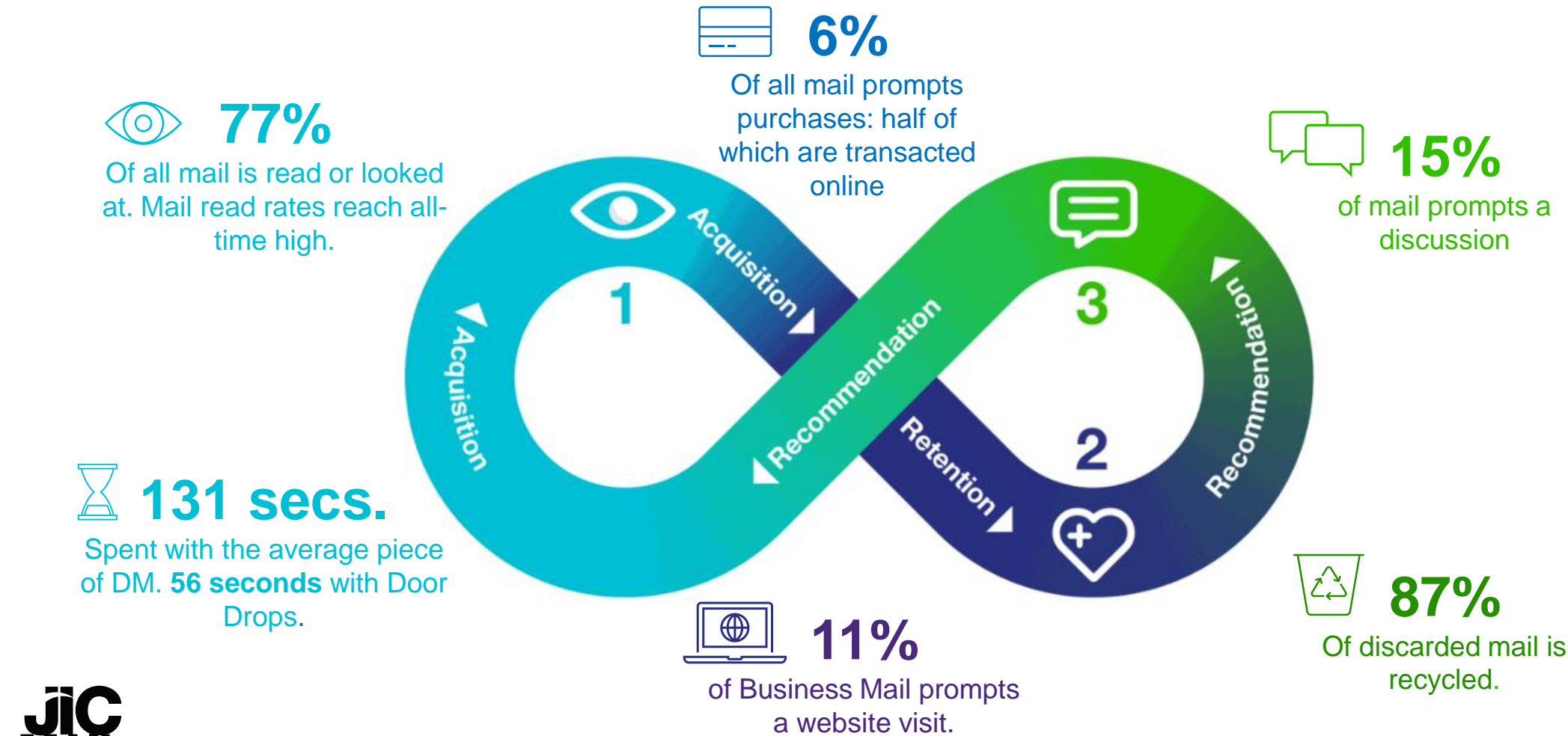
JICMAIL Quarterly Results

Q4 2024

**JIC
MAIL**

Mail Media Metrics

Mail's Super Touchpoint Strengths in Q4 2024



Q4 2024 Highlights

3



Panel Volumes

Panel volumes were virtually flat in Q4 2024. Door Drops increased 9.7% year on year; DM was down marginally by -0.4% and Business Mail down by -4.2%.

Growth was seen across all three mail types in the Supermarket and Travel sectors.



Engagement and Effectiveness

Mail read rates hit an all time high, with 77% of all mail read, looked at or glanced at.

The average Direct Mail item was interacted with for 133 seconds by anyone in the household across a 28 day period in Q4 2024, and the average Door Drop for 56 seconds. Business Mail attention has hit a new high of 191 seconds.



Mail: The Super Touchpoint

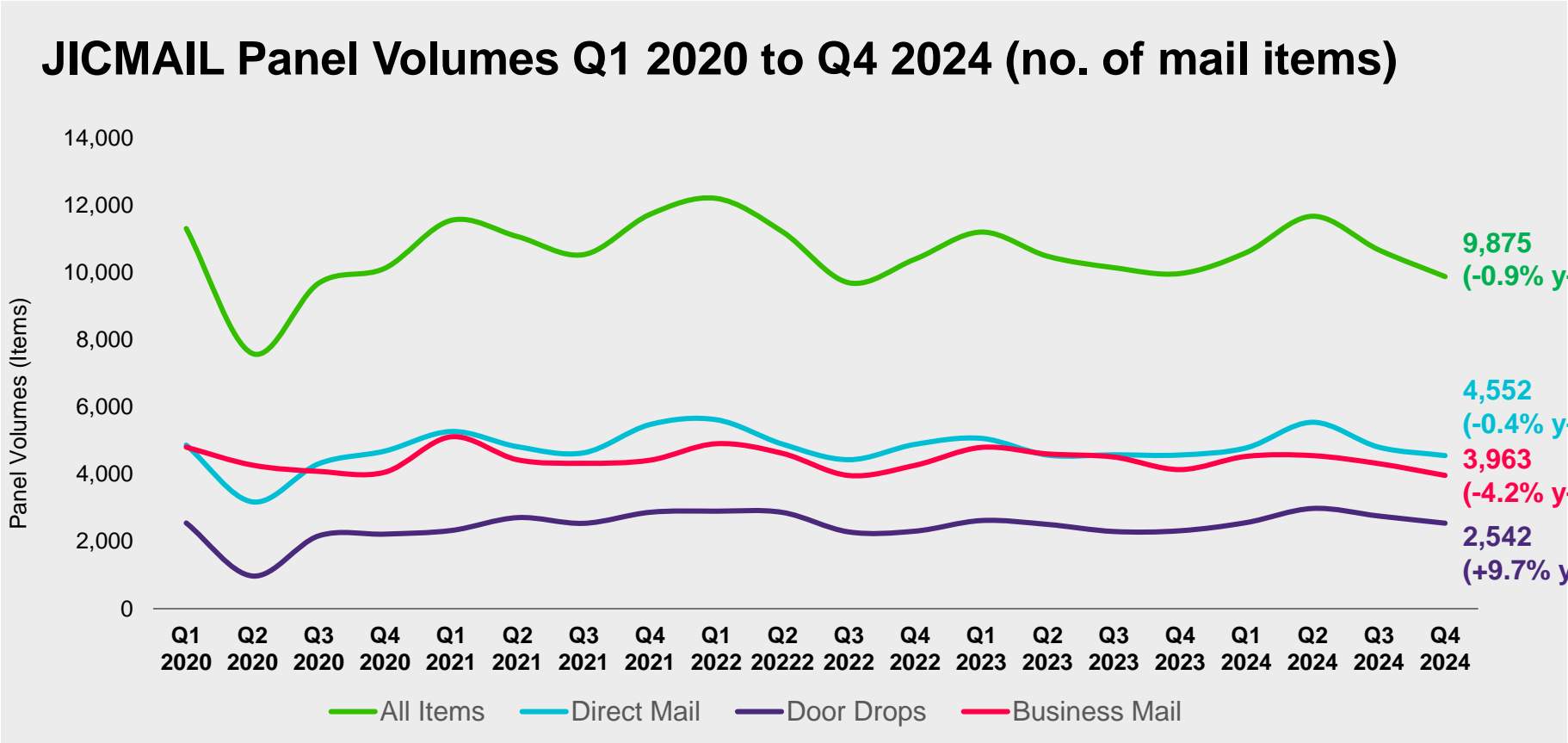
Acquisition: 6% of all mail prompts purchases: half of which are transacted online

Retention: 11% of Business Mail prompts a website visit.

Recommendation: 15% of mail prompts a discussion

Overall panel volumes flat year on year, with stand-out growth from Door Drops bucking the trend

While little change was seen in overall panel volumes year on year, a flat volume performance from DM and a slight decline in Business Mail volumes were compensated for by +9.7% growth in Door Drop volumes.

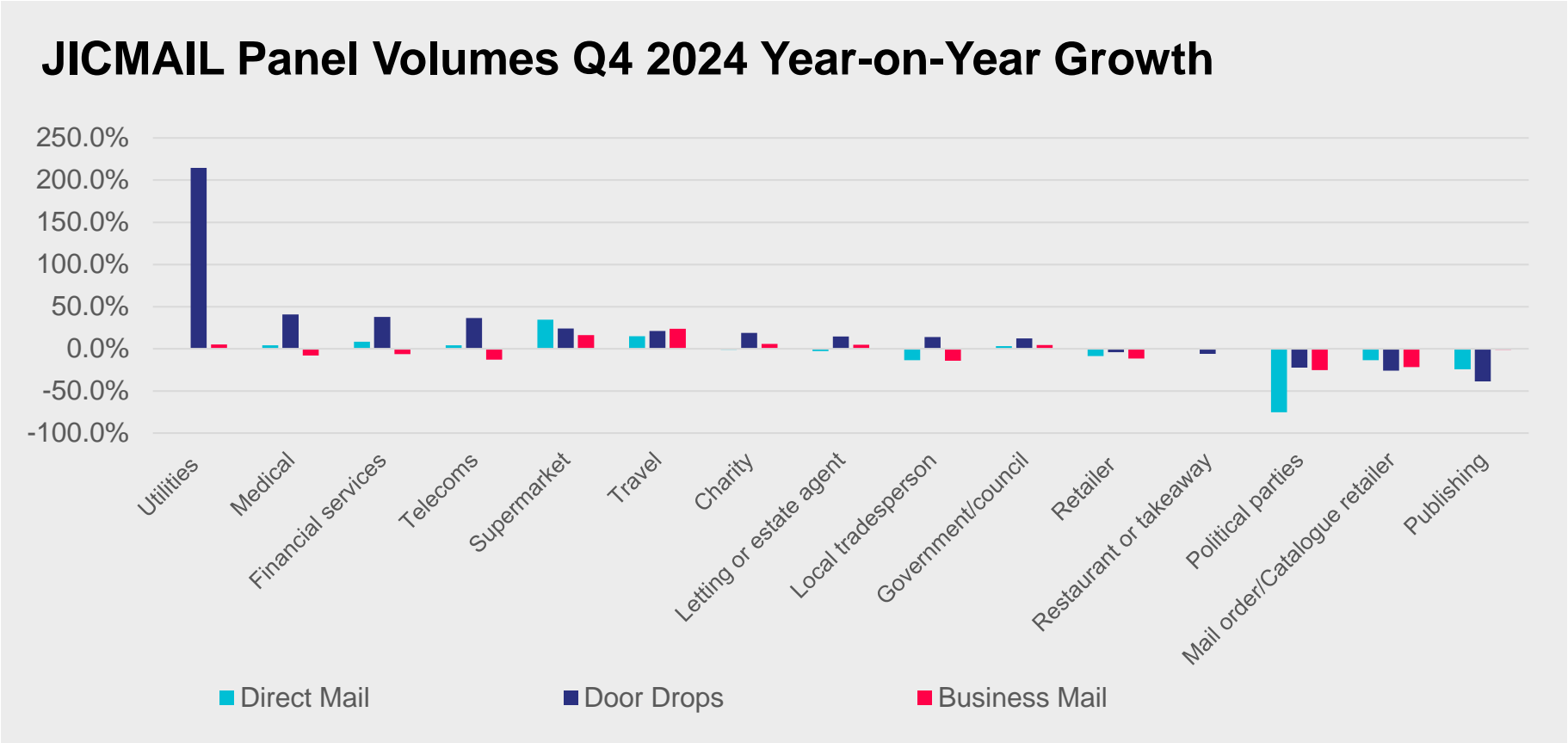


Source: JICMAIL Item Data Q1 2020 to Q4 2024 n=209,833 mail items

Strong Door Drop growth in utilities, medical, finance and telecoms

The supermarket and travel sectors experienced cross-format growth year on year and played a big role in sustaining volumes in Q4.

Although moving off smaller baselines, strong growth was recorded in utilities, medical, finance and telecoms Door Drop volumes.



Mail Engagement Q4 2024

Reach, Frequency, Lifespan and Attention

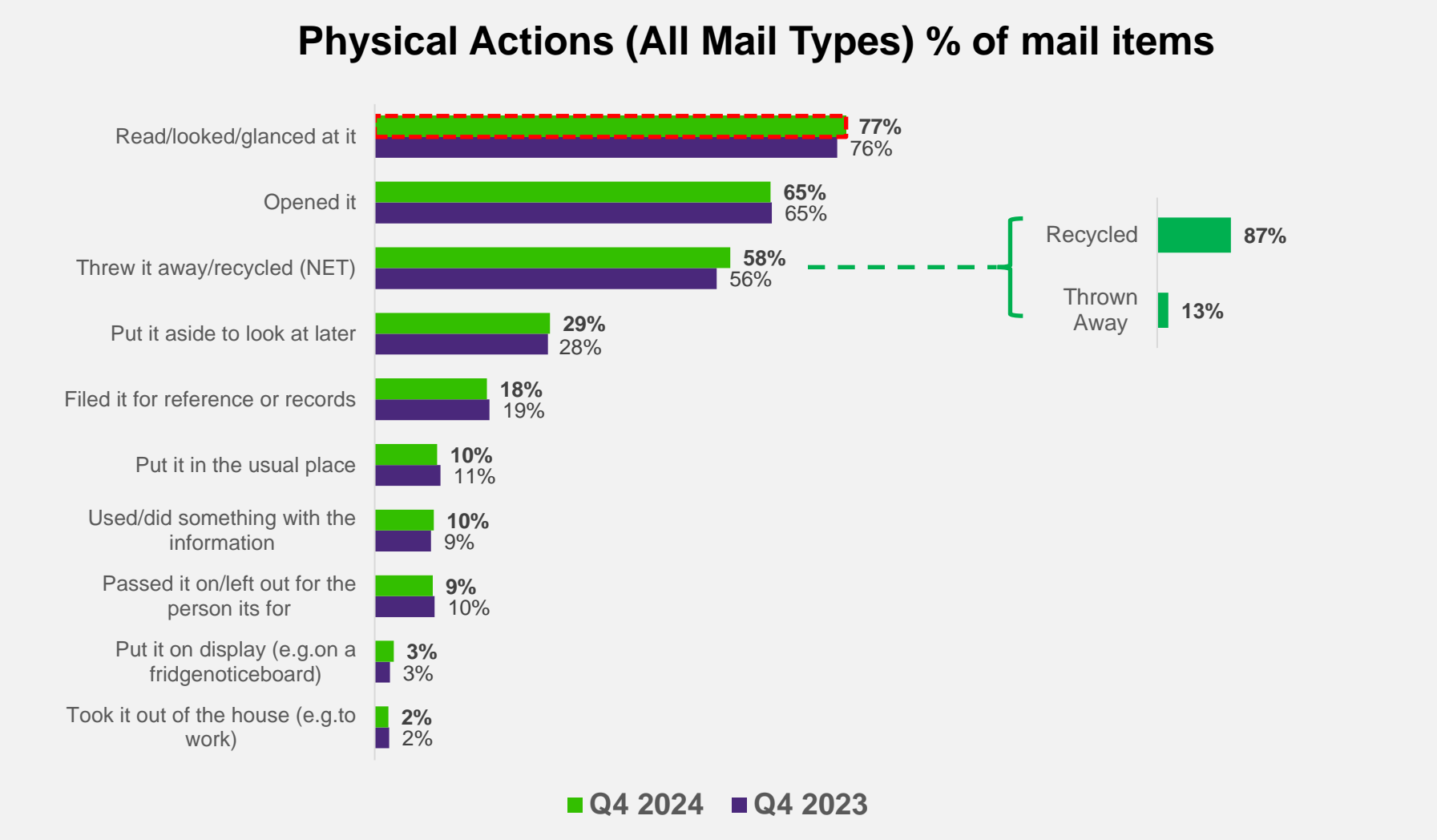
Mail read rates up to record levels in Q4 2024

In the last half decade, households have been showing ever increasing appetite for reading mail content.

Mail read rates have increased year in year in all but two of the last 16 quarters and reached a new peak of 77% in Q4 2024



Mail Media Metrics

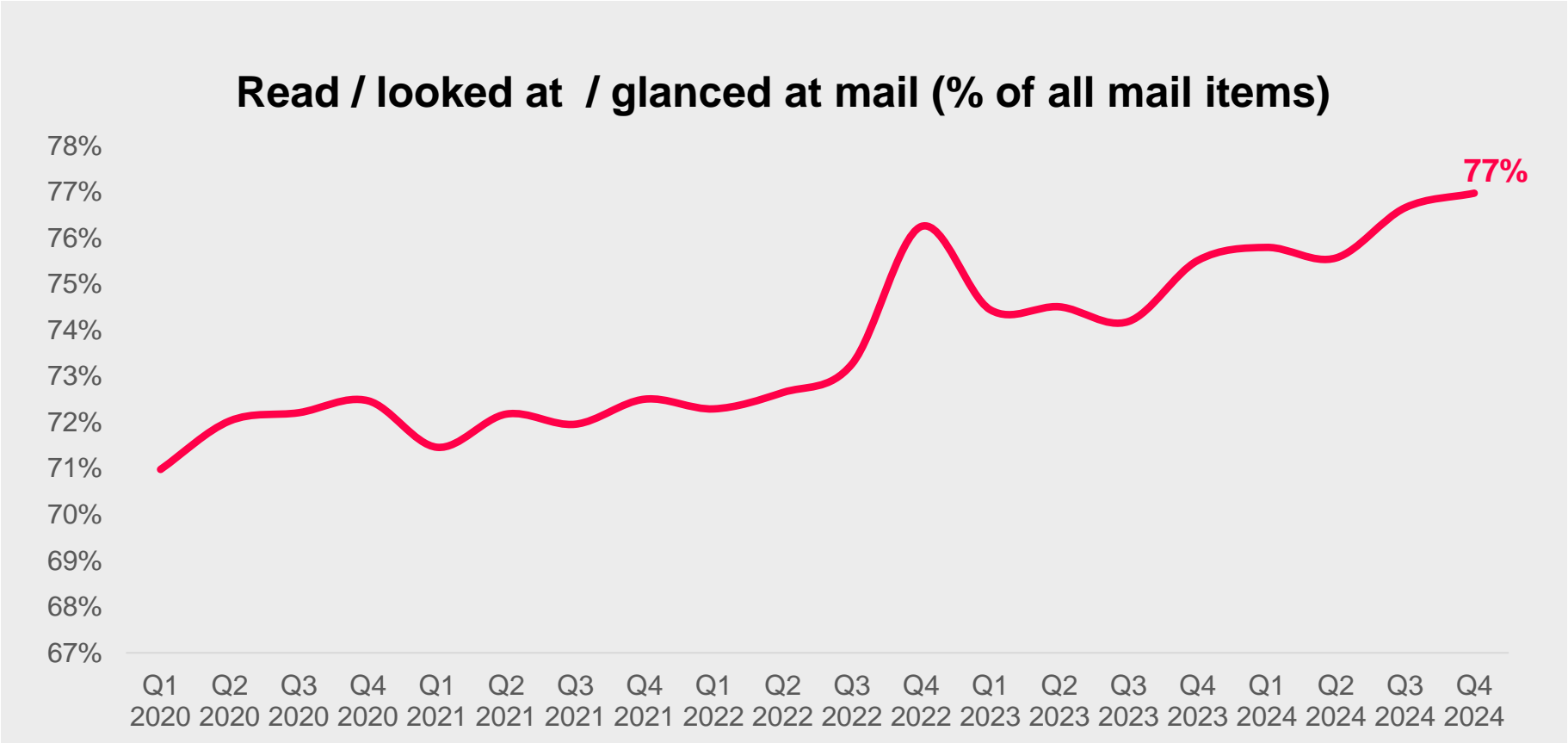


Source: JICMAIL Item Data Q4 2023 n=9,966 mail items; Q4 2024 n=9,875 mail items

More mail is being read or looked at than ever before

Even at the peak of the pandemic when mail engagement rates spiked, mail read rates hovered around the 71%-72% mark.

Now five years later the proportion of DM, Door Drops and Business Mail combined being read or looked at has hit a new peak of 77%



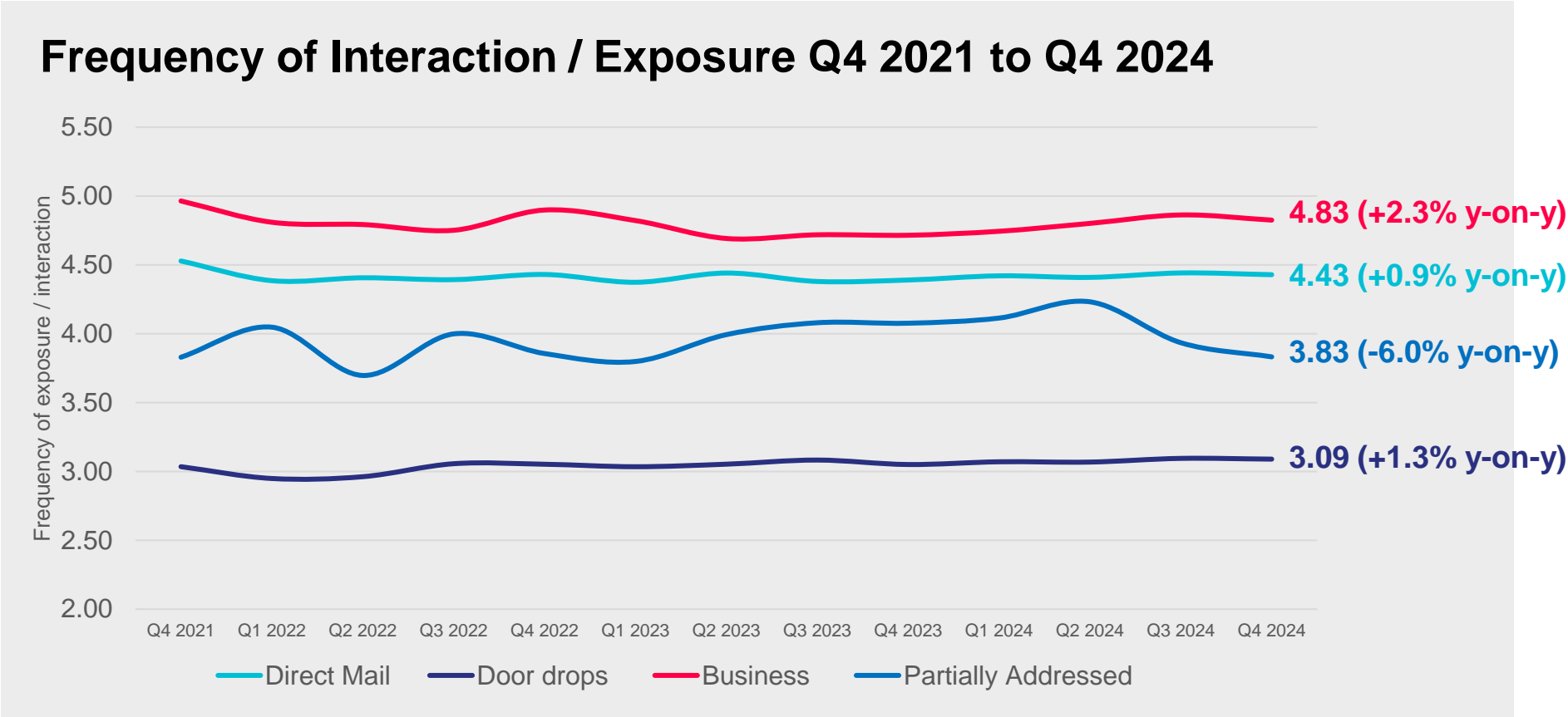
Source: JICMAIL Item Data Q1 2020 to Q4 2024 n=209,833 mail items

Business Mail interaction rates up again year on year

The average piece of Business Mail was physically interacted with 4.83 times across 28 days on average in Q4 2024: the third quarter of growth for the channel.

DM and Door Drop frequency was also up year on year.

Frequency of Interaction / Exposure Q4 2021 to Q4 2024



Source: JICMAIL Item Data Q4 2021 to Q4 2024 n=138,709 mail items

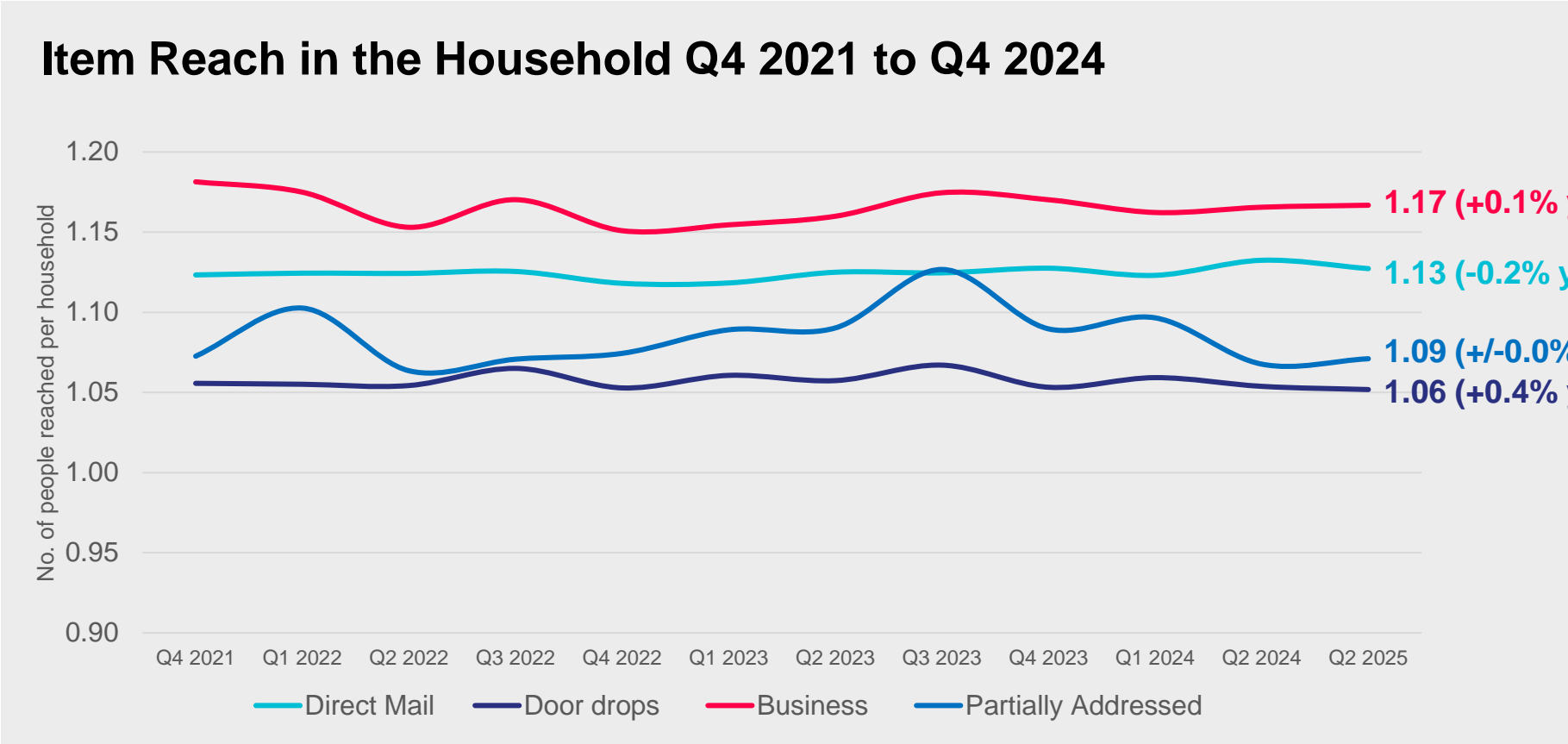
Mail sharing rates broadly stable year on year

The average piece of Business Mail is seen by 1.17 people per household, generating an additional 170,000 people reached per 1 million mail items.

DM Item Reach is at 1.13 and Door Drops 1.06.



Item Reach in the Household Q4 2021 to Q4 2024

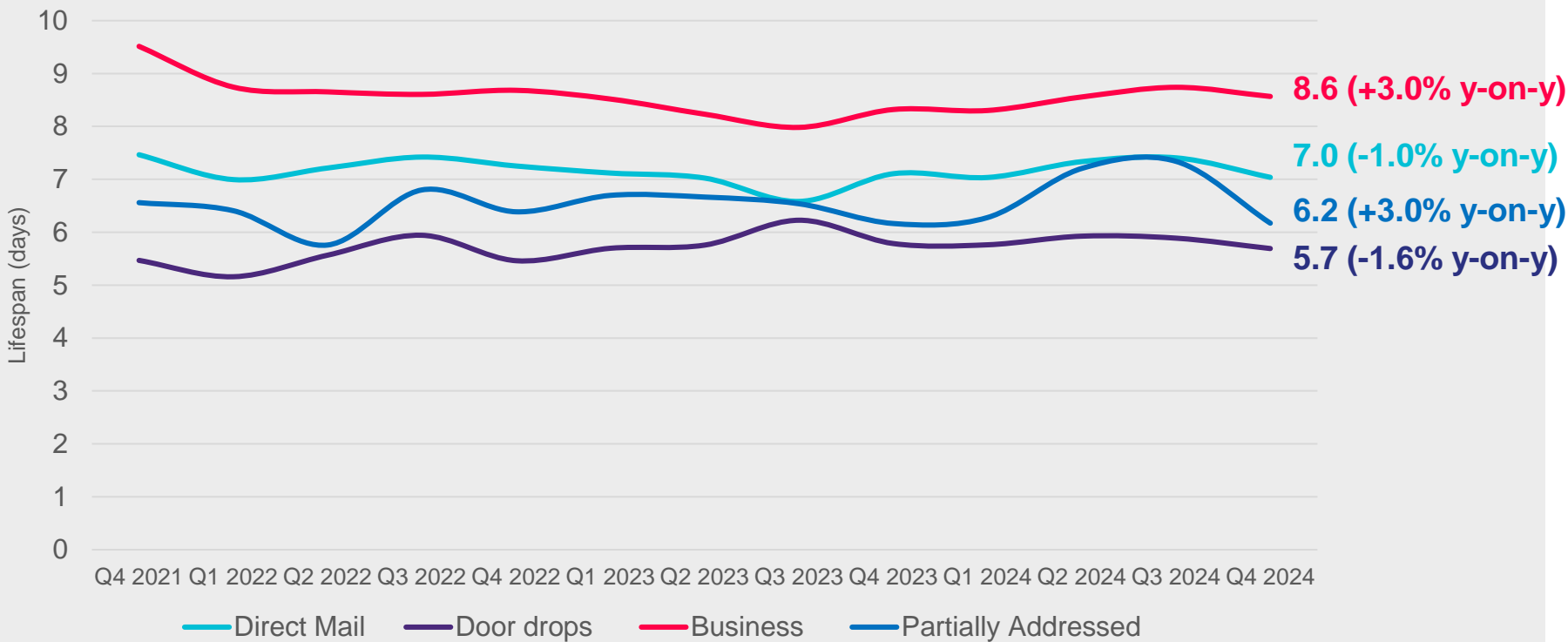


Source: JICMAIL Item Data Q4 2021 to Q4 2024 n=138,709 mail items

Business Mail lifespan up for third quarter running in Q4

Business Mail is live in the home for 8.6 days on average before being discarded or filed away – a metric which has grown for the third quarter in a row.

Lifespan (days) Q4 2021 to Q4 2024

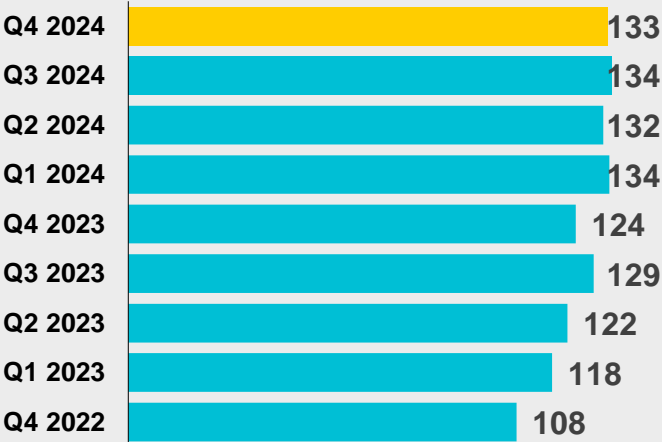


Source: JICMAIL Item Data Q4 2021 to Q4 2024 n=138,709 mail items

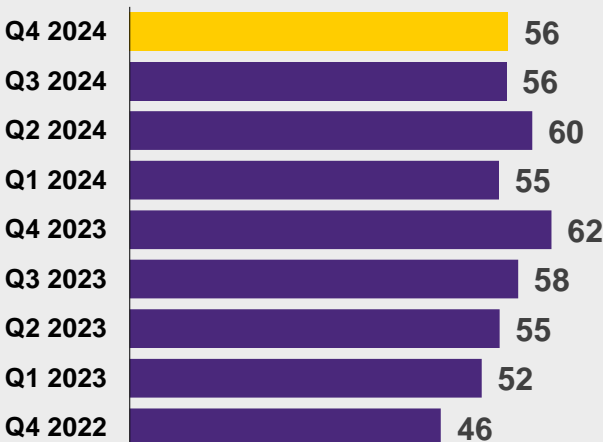
DM and Door Drop attention stable quarter on quarter

The average Direct Mail item was interacted with for 133 seconds by anyone in the household across a 28 day period in Q4 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)

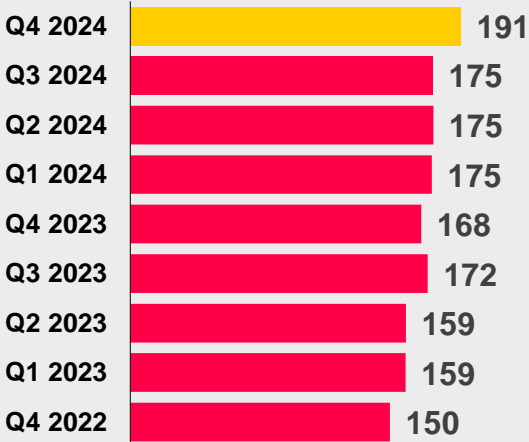


Business Mail attention hits two-year peak in Q4 2024

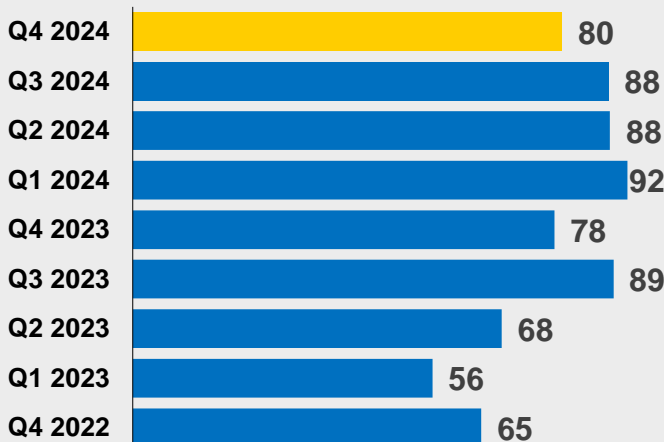
The average Business Mail item was interacted with for 191 seconds by anyone in the household across a 28 day period in Q4 2024 – the highest reading of this metric since JICMAIL began tracking it in Q4 2022



Business Mail Attention (seconds interacted with per item)



Partially Addressed Mail Attention (seconds interacted with per item)



Mail Effectiveness Q4 2024

Commercial Actions

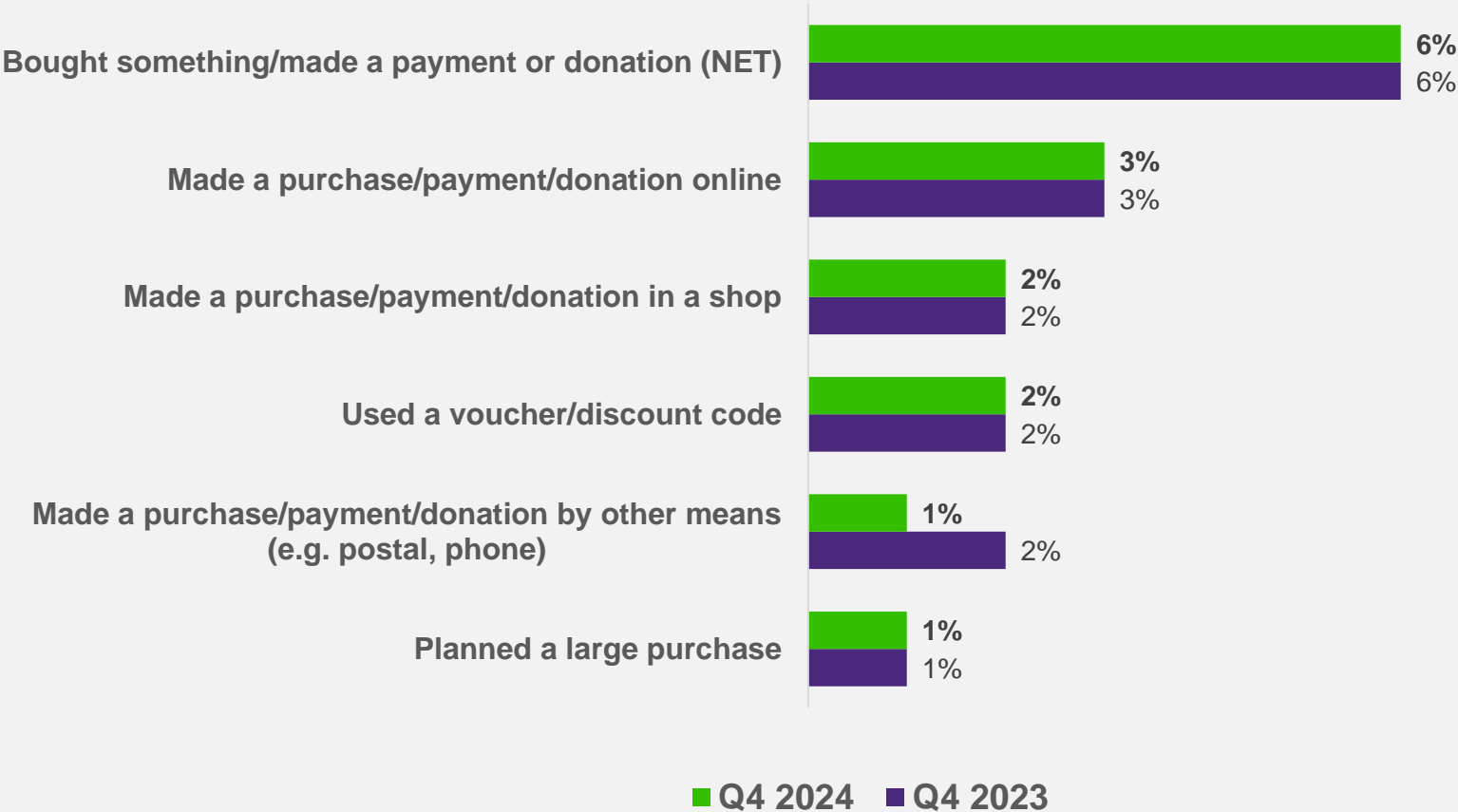


Mail Media Metrics

6% of mail prompted a purchased in Q4 2024

Customer Acquisition

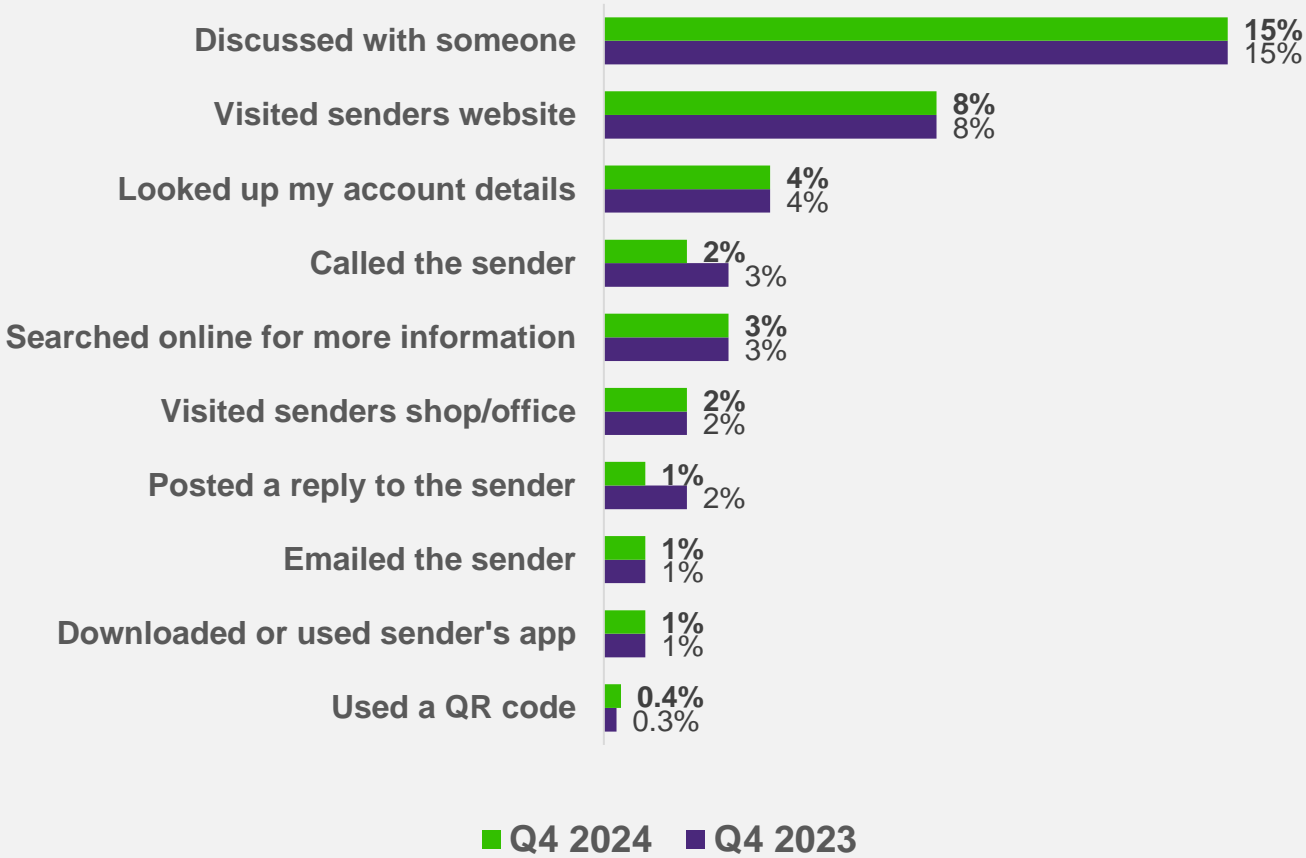
Commercial Actions (All Mail Types) % of mail items



15% of mail prompted a conversation

Customer Retention and Recommendation

Commercial Actions (All Mail Types) % of mail items



Mail Media Metrics

Source: JICMAIL Item Data Q4 2023 n=9,966 mail items; Q4 2024 n=9,875 mail items

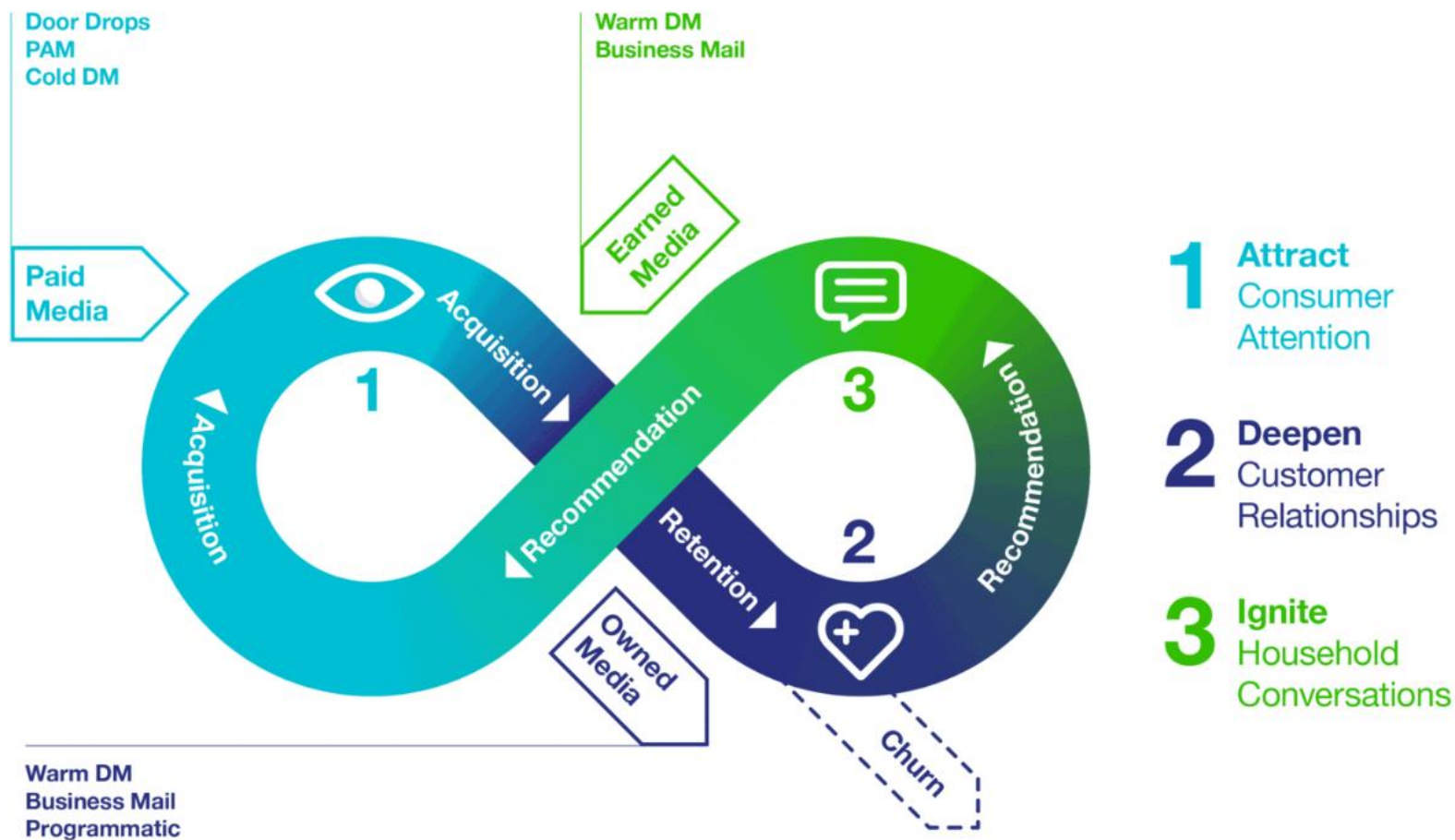
Mail Performance Drivers Q4 2024

Exploring mail's Super Touchpoint strengths



Mail Media Metrics

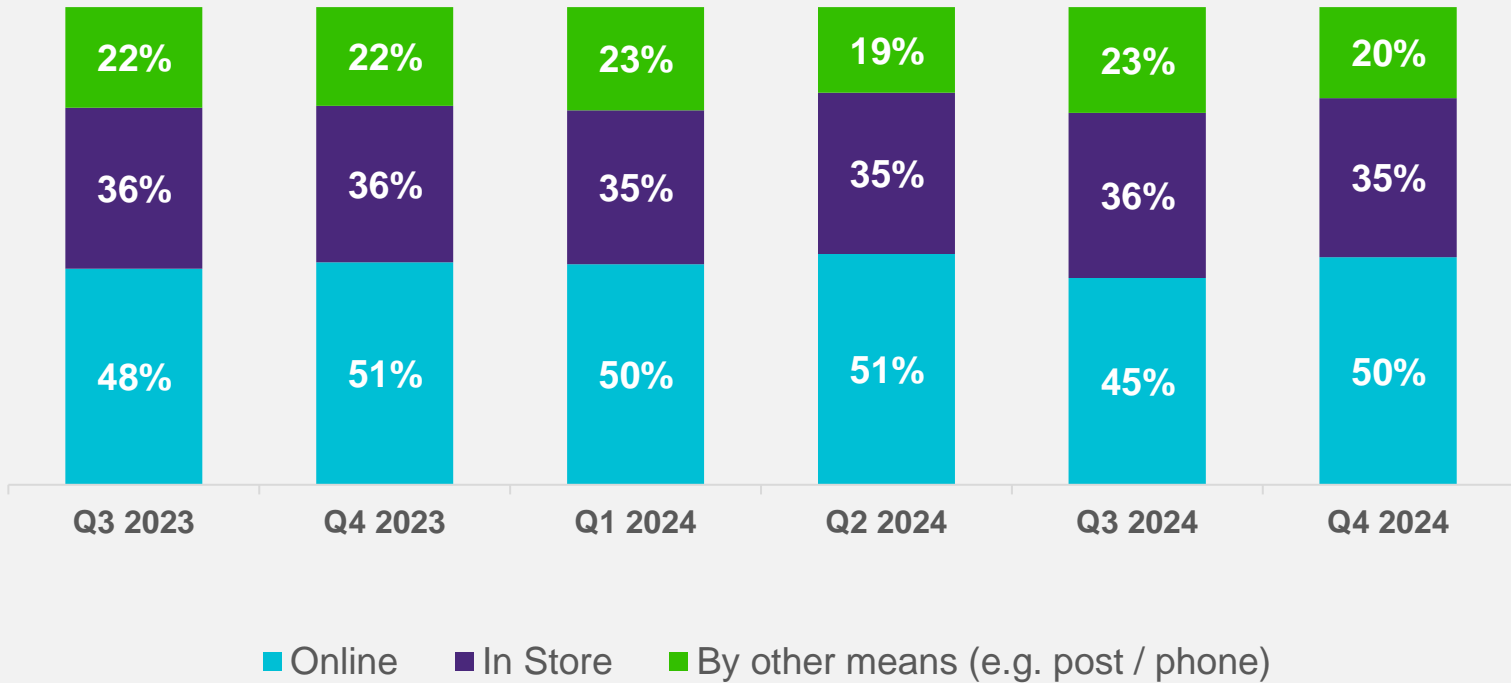
Mail has a role to play throughout the marketing cycle



Customer Acquisition: Mail drives omni-channel shopping activity

In the vital Q4 trading season, half of all purchases prompted by mail were transacted online, vs 35% in store.

Purchases by Channel
(base: % of DM, Door Drop and Business Mail items prompting a purchase)

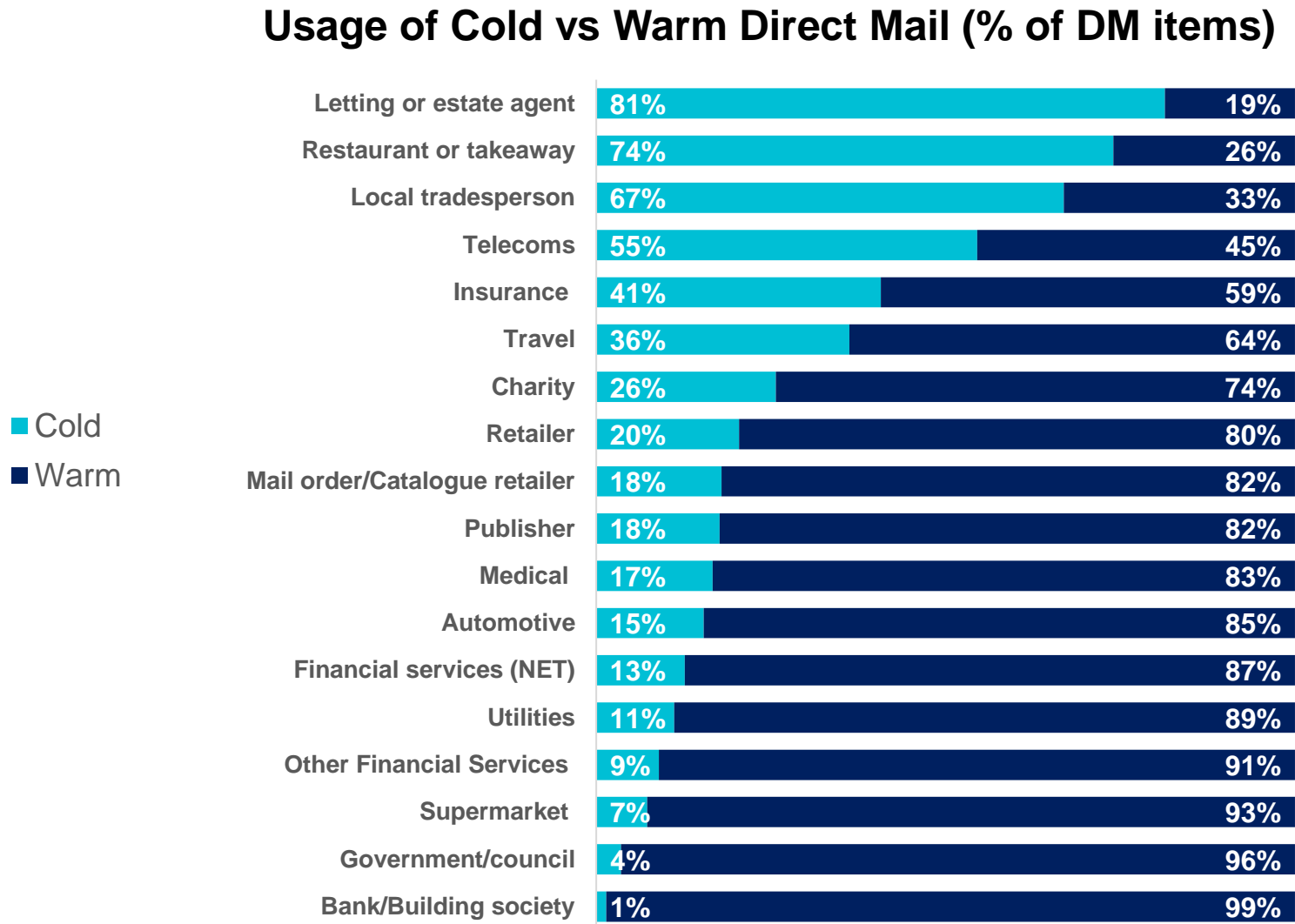


Mail Media Metrics

Source: JICMAIL Item Data Q3 2023 to Q4 2024 n=62,660 mail items

Customer Acquisition:

Wide sector variance in the usage of cold Direct Mail



Customer Acquisition: Supermarkets and Charities lead the way in driving DM response ²¹

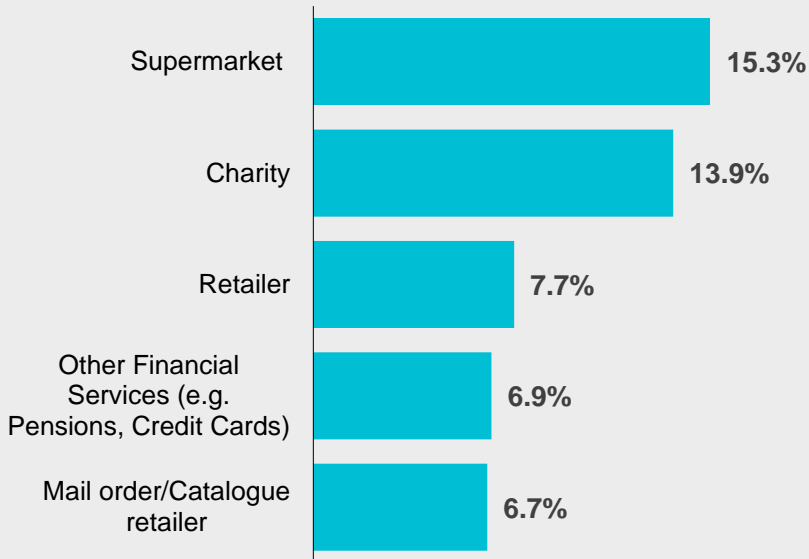
15.3% of Direct Mail from Supermarkets prompts a purchase. Loyalty reward statements for existing customers and vouchers and coupons for new acquisitions play a big role in driving purchase.

Charity advertisers are also adept at driving high levels of response from DM using requests for donation and postal replies.

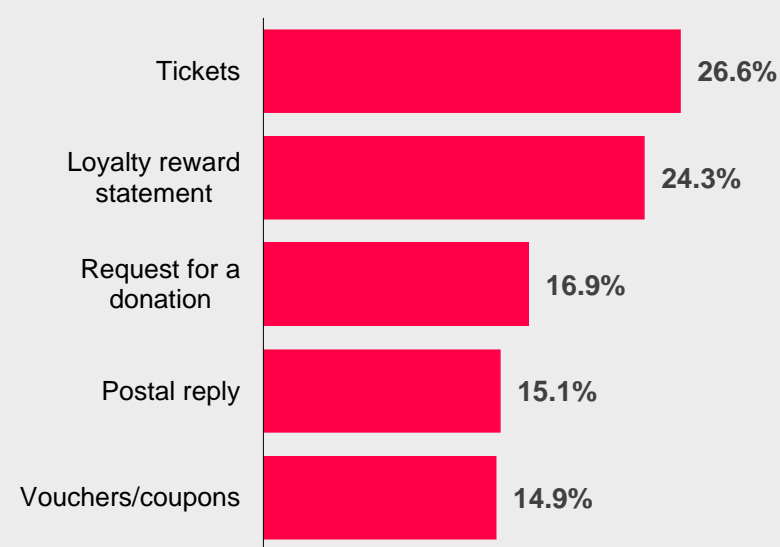


Mail Media Metrics

Direct Mail Sectors (% of items prompting purchase / donation: top 5)



Direct Mail Content (% of items prompting purchase / donation: top 5)



Source: JICMAIL Item Data Q1 2020 to Q4 2024 n=94,629 Direct Mail items

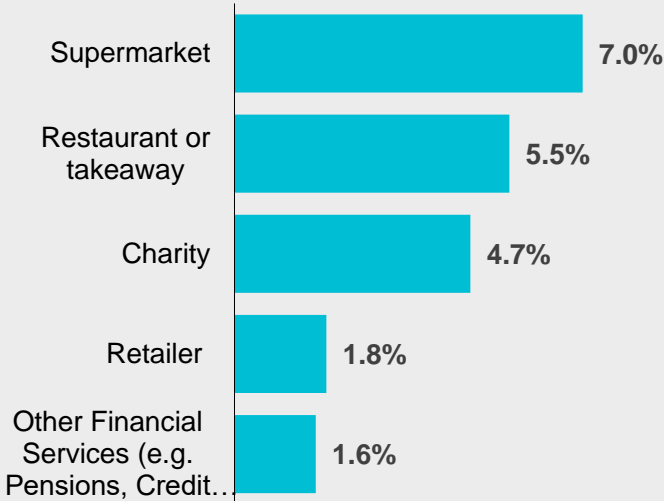
Customer Acquisition: Supermarkets, restaurant and charities top for Door Drop response

Door Drops are a particularly effective acquisition channel for supermarkets, charities and restaurants with vouchers, donation requests and special offers all playing a crucial role in driving response.

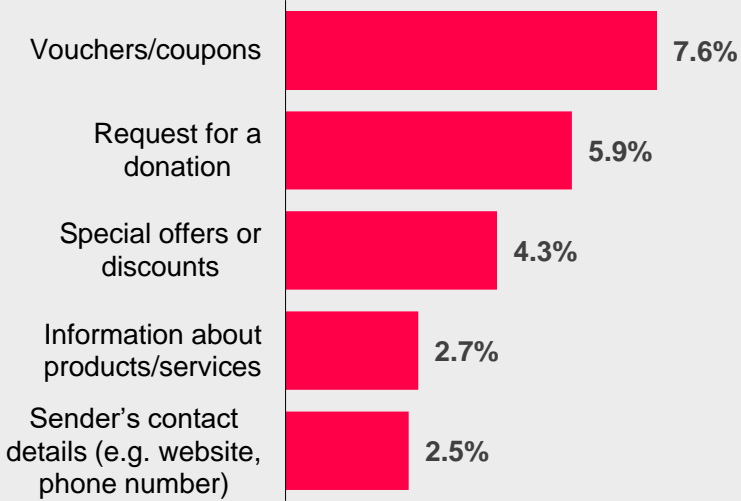


Mail Media Metrics

Door Drop Sectors
(% of items prompting purchase: top 5)



Door Drop Content
(% of items prompting purchase: top 5)

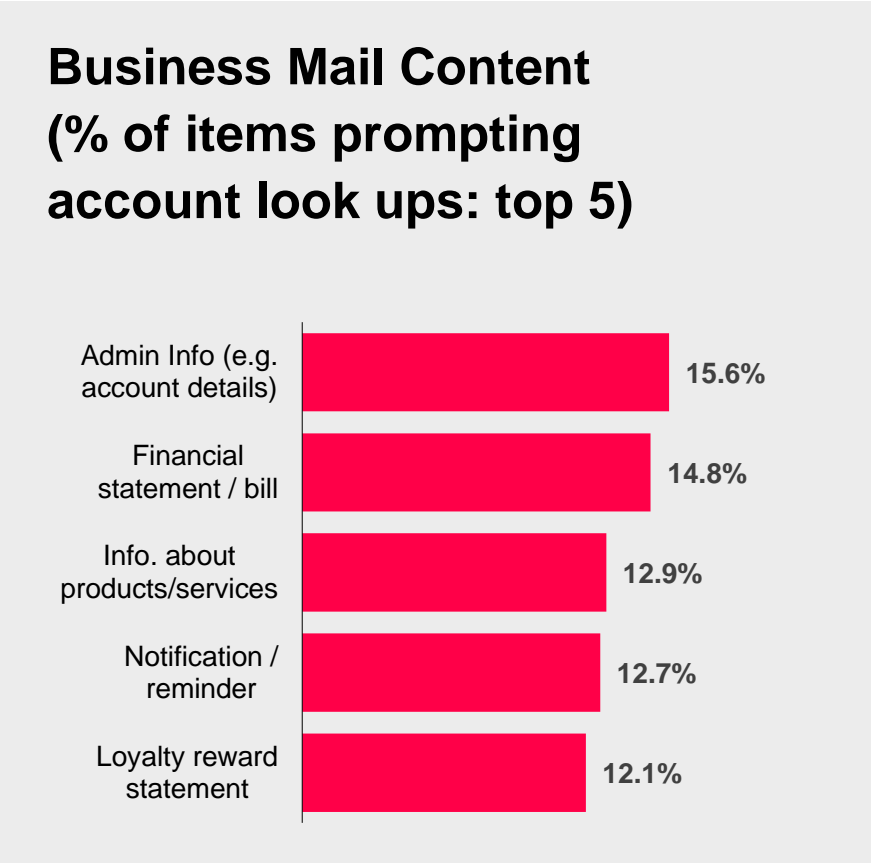
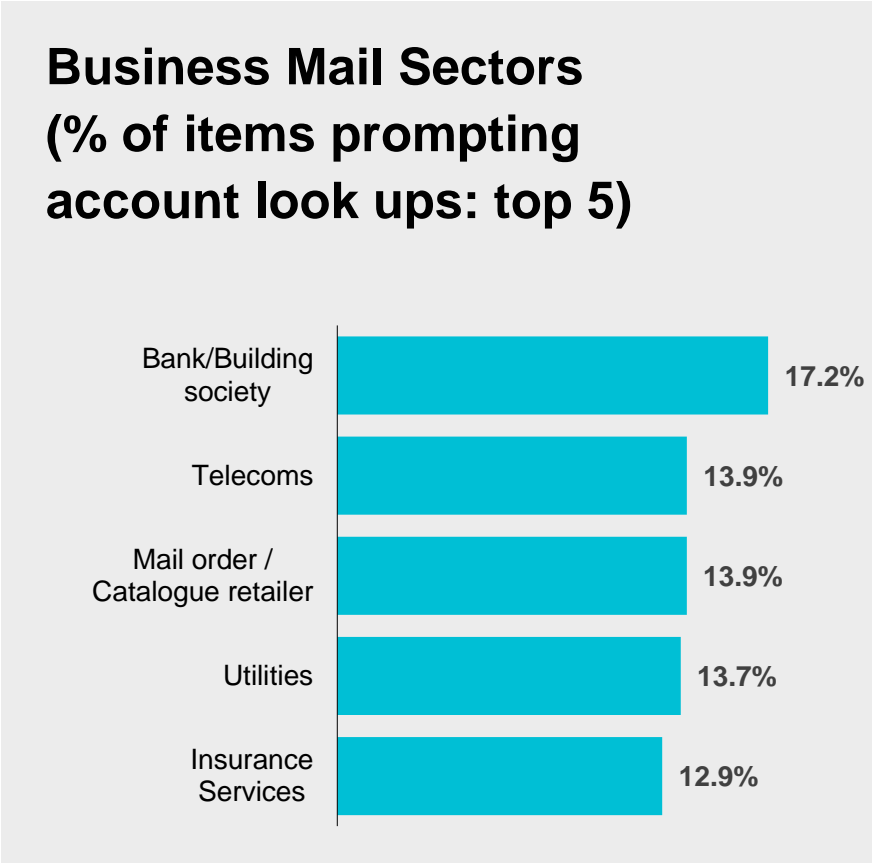


Source: JICMAIL Item Data Q1 2020 to Q4 2024 n=48,841 Door Drop items

Customer Retention:

17% of Business Mail from banks prompts account look ups

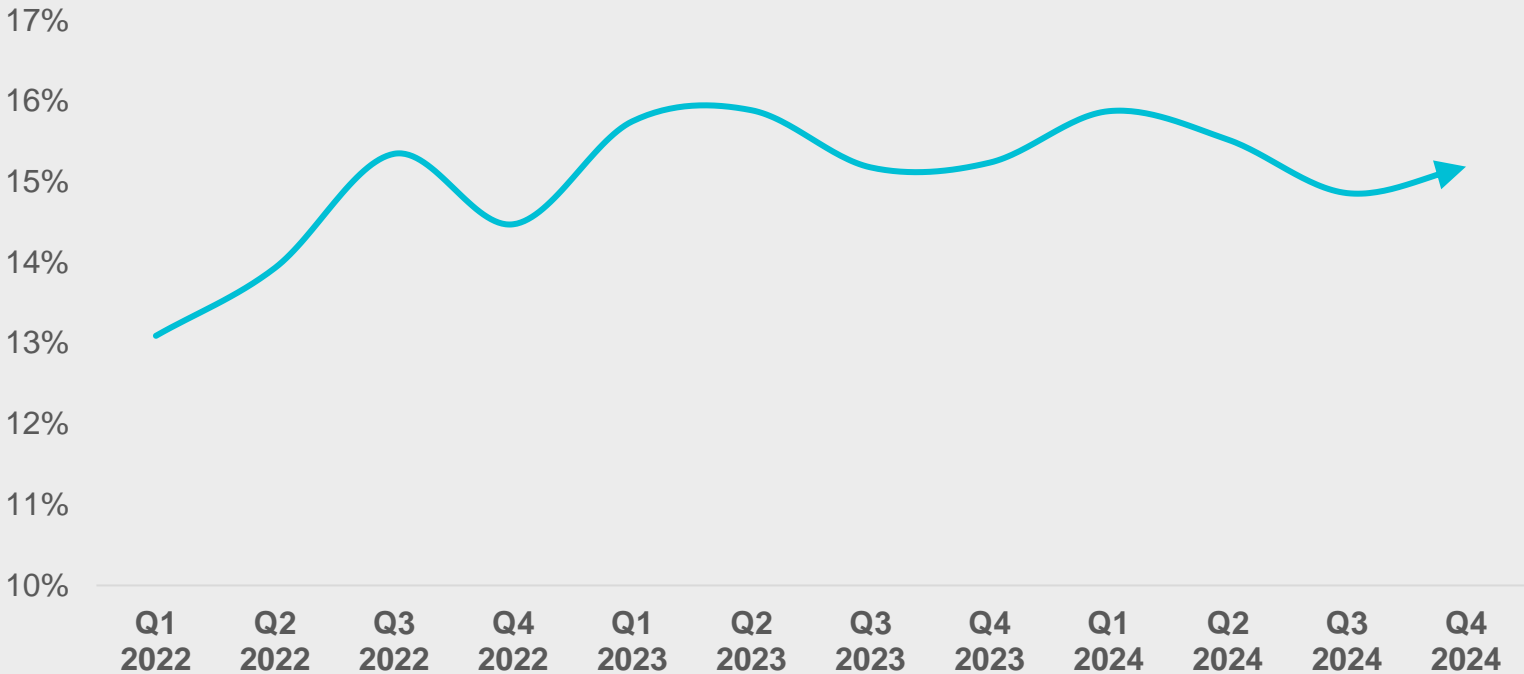
As a means to encouraging customer engagement online, Business Mail has a highly effective role to play for banking, telecoms, mail order, utilities and insurance brands alike.



Household Conversations: Discussions Prompted by Mail on a long-term upward trend

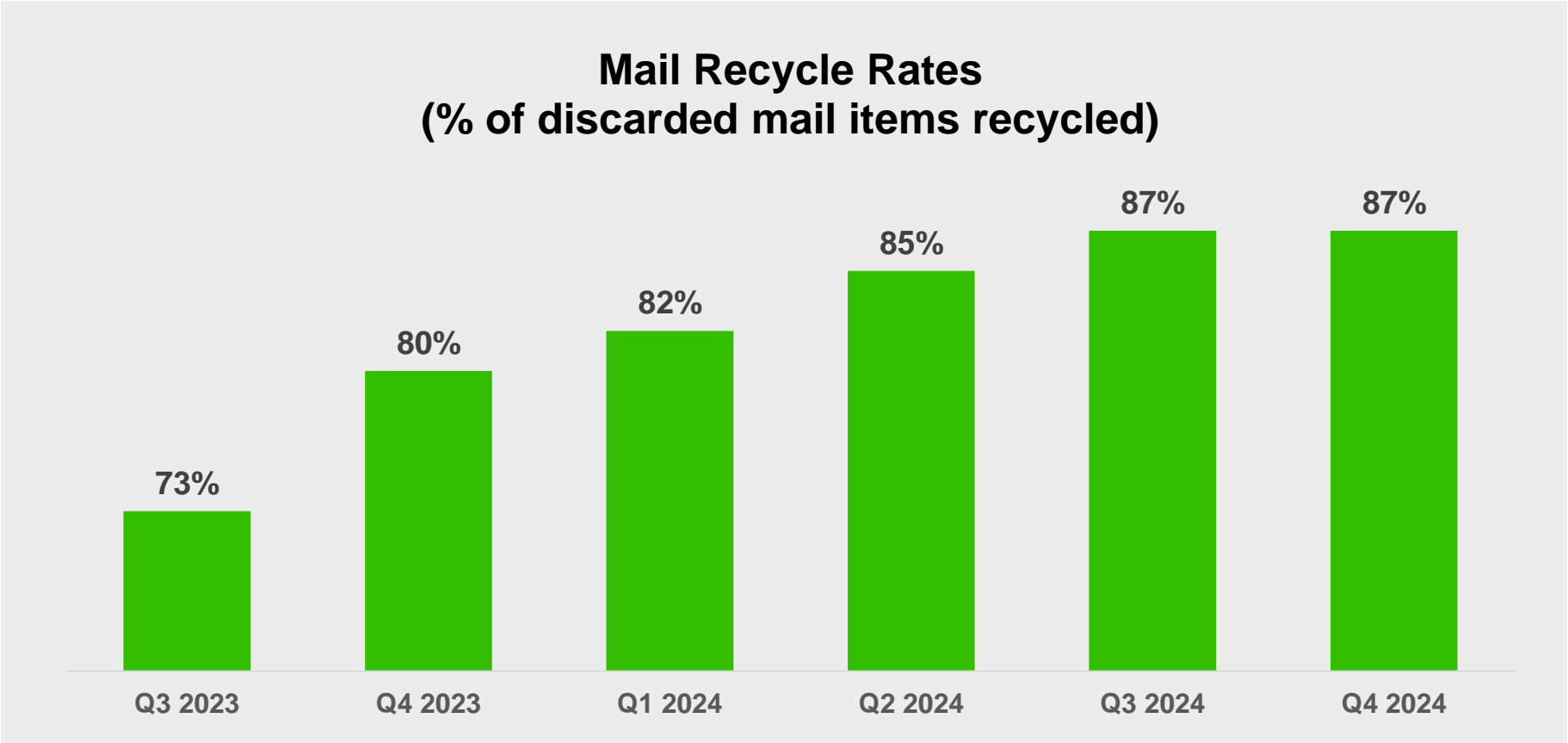
Over 15% of all mail items prompt a discussion in the household. This is on a long-term upward trends vs the 13% observed three years ago.

Discussions prompted by mail (% of mail items)



Mail recycle rates grew +7% year on year in Q4 2024

87% of mail discarded within 28 days is recycled, while 13% is thrown away.



Advertiser Activity Q4 2024

Share of Doormat and Attention

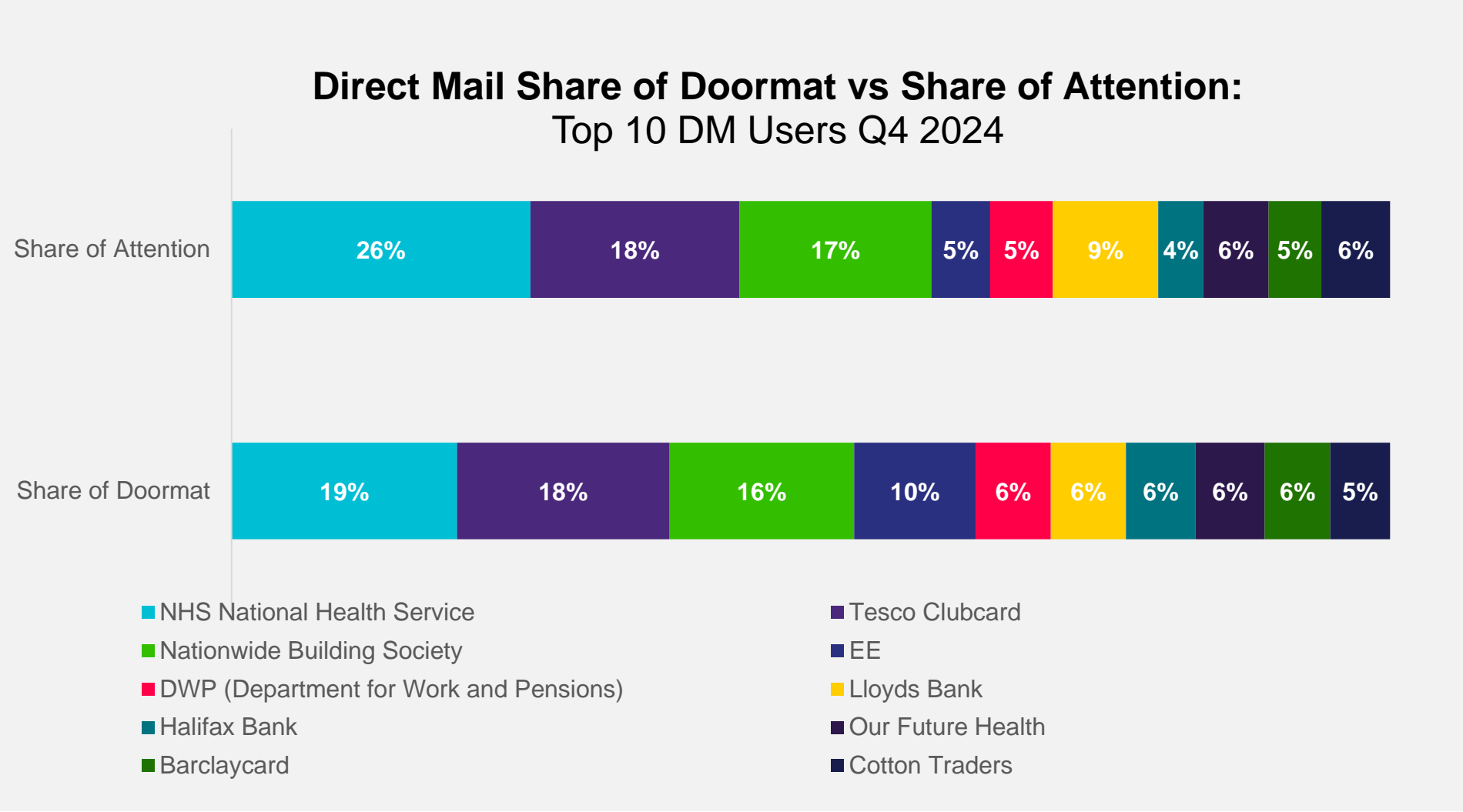


Mail Media Metrics

7,763

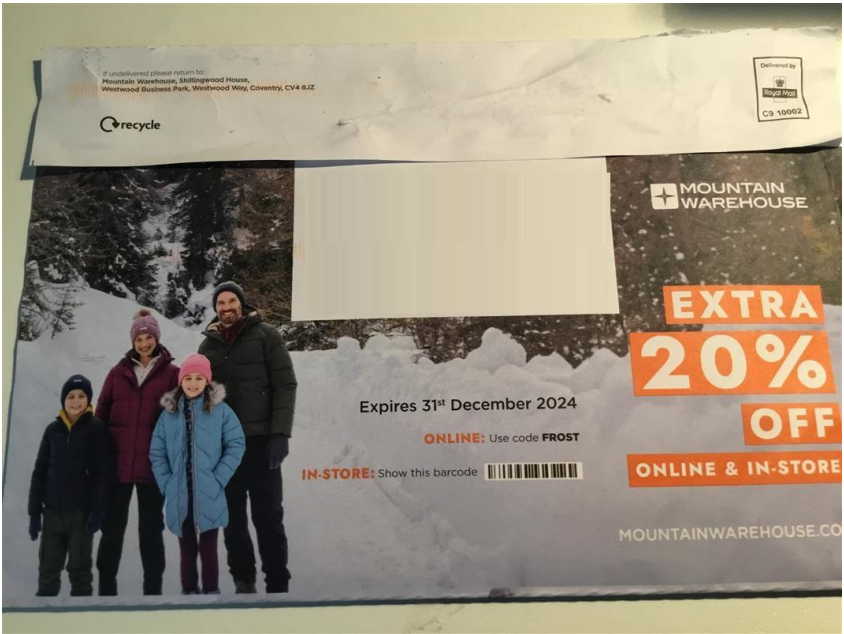
Advertisers have
used DM or Door
Drops in 2024 (15%
of all UK
advertisers)

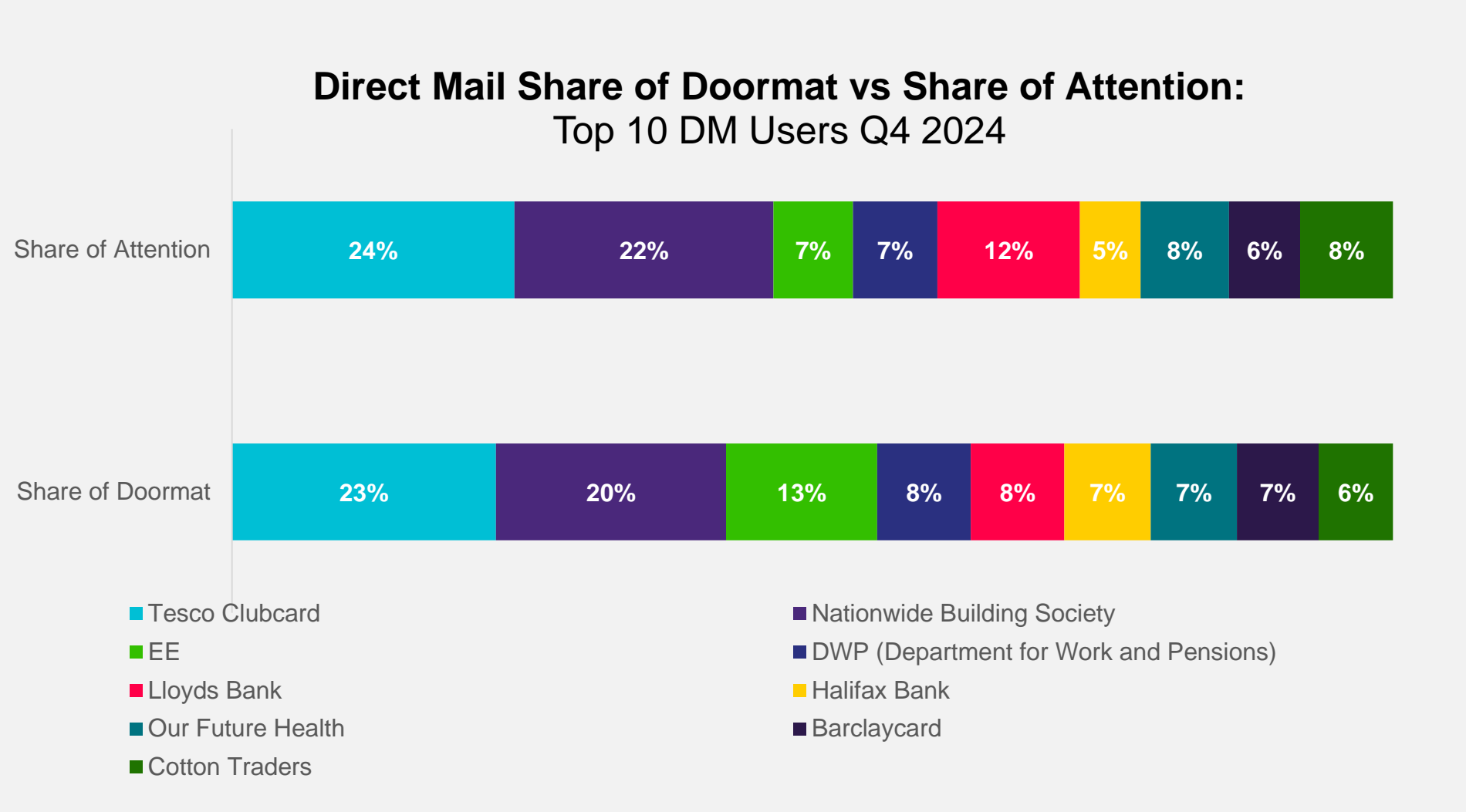
Lloyds Bank and the NHS overperforming for share of DM attention



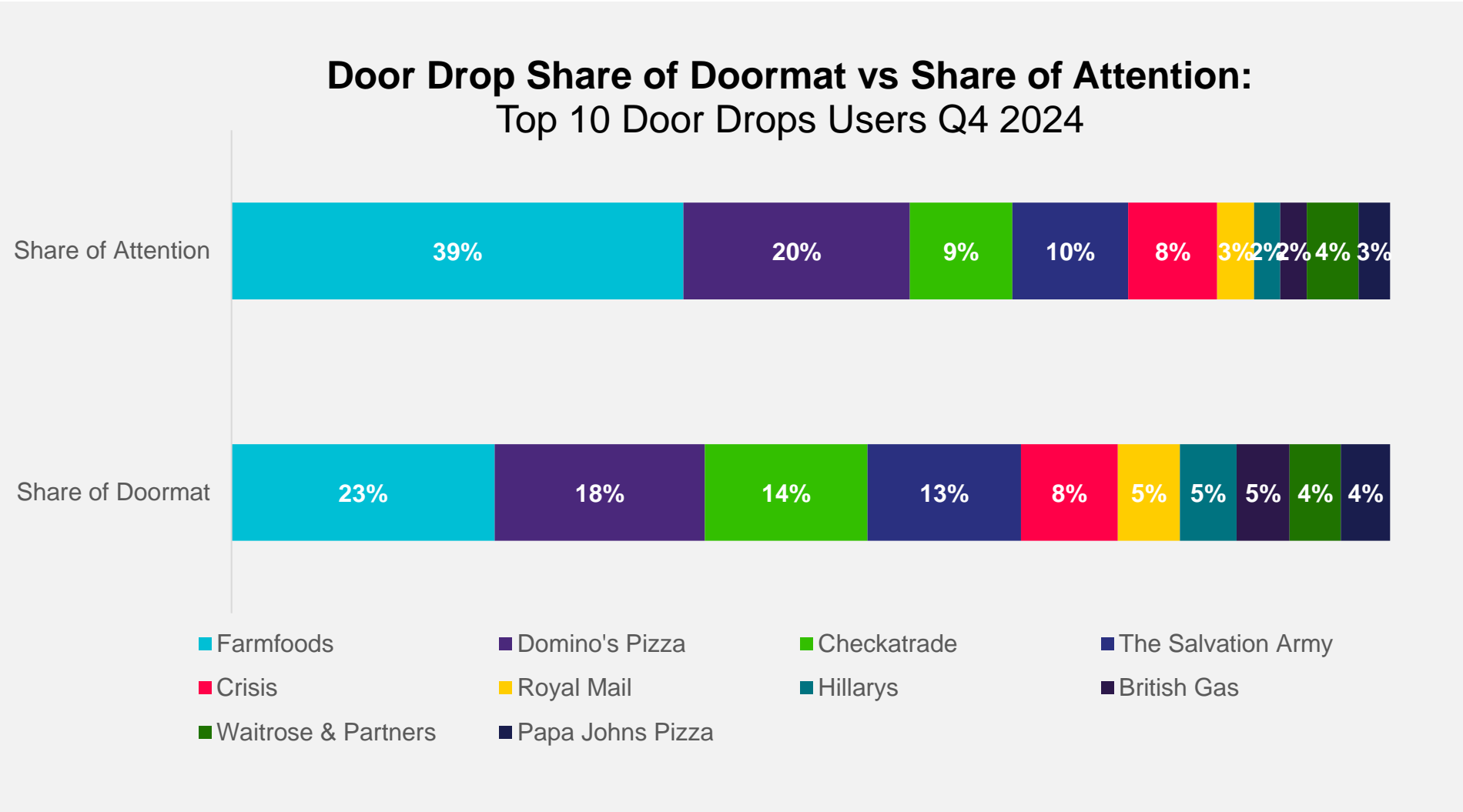
Source: JICMAIL Advertiser Attribution Data Q4 2024

Seasonal retail Direct Mail creative in full swing





Farmfoods captured a huge share of Door Drop attention in the crucial Q4 trading period

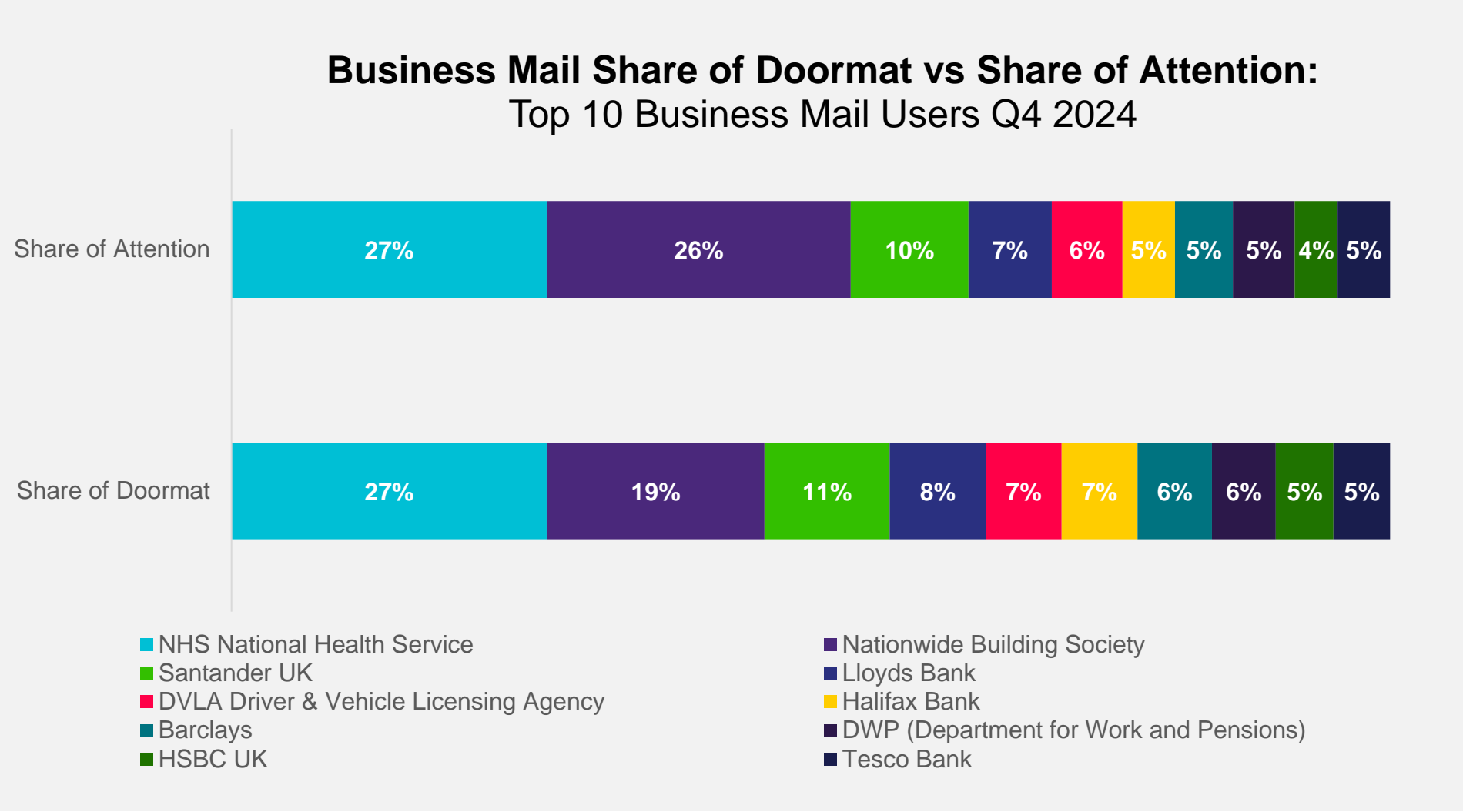


Both ends of the grocery market well covered by Door Drops

32

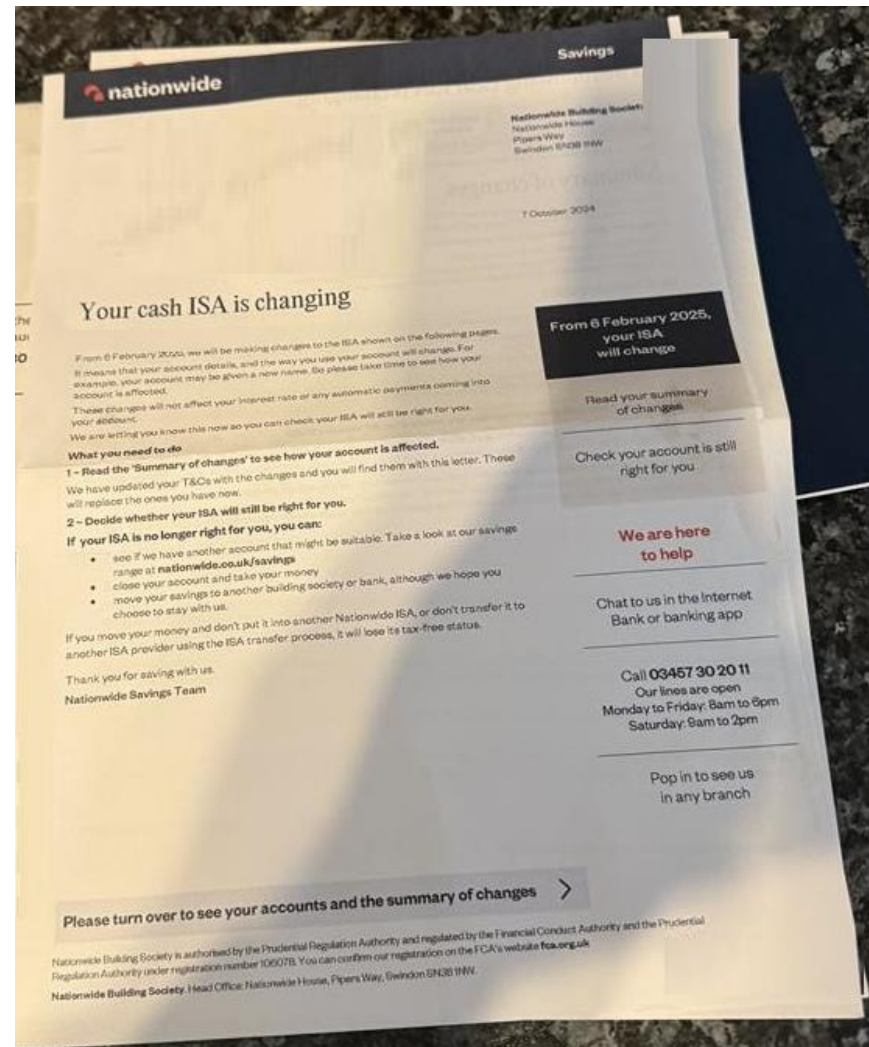


Nationwide over-performs for share of Business Mail attention



All eyes on ISAs!

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Mail Media Metrics



Panel Volumes

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Thanks

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