

The time we spend with mail

A JICMAIL Attention Study

JUNE 2023



Mail Media Metrics



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Five key mail attention takeaways

Across the following five chapters this report presents compelling insight that potentially transforms how mail is planned. It presents new fundamental truths on mail attention, contextual relevance, content planning, performance optimisation, and cost efficiency.

01

Mail is a high attention channel, The average Direct Mail item generates 108 seconds of attention across 28 days; Business Mail 150 seconds; Partially Addressed 64 seconds; and Door Drop 46 seconds.

02

Mail attention is linked to commercial effectiveness. There is a **x2 to x3 multiplier for time spent** with commercially effective Direct Mail items and a **x3 to x5 multiplier** for Door Drops.

03

Mail generates **over five minutes of website usage** on average, by items prompting digital traffic.

04

Location and contextual relevance are key drivers of mail attention. The Living Room and Kitchen are particularly high mail attention environments.

05

Mail attention is generally a solus activity and it is **more attention efficient** than virtually all other media channels.



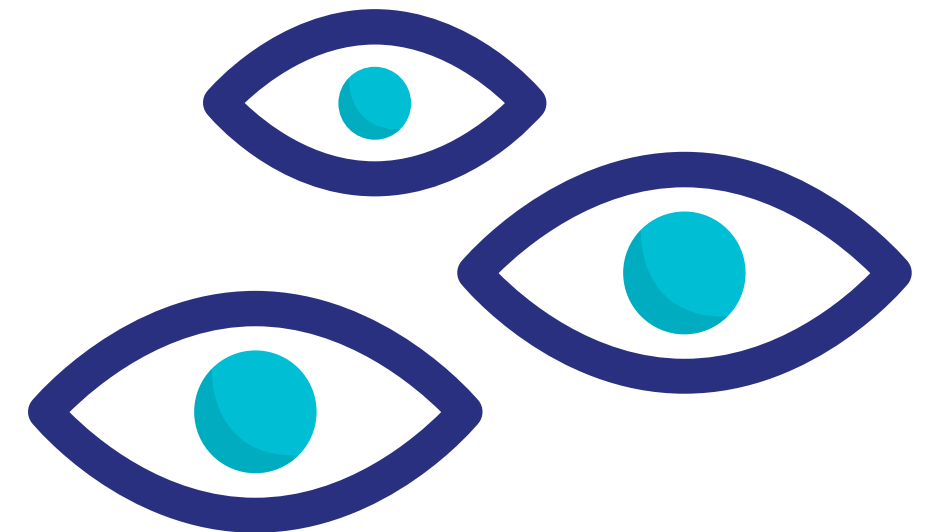
Introduction

It is said that human exposure to advertising can no longer be assumed, and in the age of ad-blocking, billion-dollar ad fraud, and the mass-fragmentation of consumer attention across multiple devices, it is easy to see why. What has become abundantly clear ever since programmatic algorithms started valuing ad inventory in high quality editorial environments online in exactly the same way that they do in the long-tail of lower quality websites, is that the media pricing mechanism that acknowledges that not all ad-exposures are equal has become almost (almost) irreversibly fractured.

Intuitively planners and buyers know that exposures in TV, Direct Mail, Door Drops, Out of Home and Radio are qualitatively different beasts, and these assumptions used to be baked into prices accordingly. The advent of digital however – and in particular, the use of low-cost digital display inventory – has prompted a race to the bottom and advertising has increasingly become regarded as a homogenous product as the ugly forces of commoditisation start to take hold.

The result is bad news for consumers, brands and media owners alike. Consumers get bombarded with low quality advertising at unacceptably high frequency levels; advertisers end up wasting ad budget on inefficient inventory that is doing nothing to their long term brand health; while media-owners find their ad revenue targets under increase pressure.

And so, enters attention: the increasingly not-so-new media planning metric on the block. Once the preserve of out-of-home, TV and digital effectiveness studies that rely on eye-tracking technology to quantify how long a consumer's gaze is directly fixed on advertising, other media-channels are now broadening their approach in this area: adding to the weight of research in the field and developing new pricing models that finally enable planners and practitioners to evaluate media on a like-for-like basis.





Introduction (Continued)

JICMAIL has embarked on a year-long attention initiative that has taken in a pilot-study in the summer of 2022; a validation exercise by PWC; full-scale attention measurement across our panel of 1000 households in Q4 2022, along with an in-home AI driven video analytics exercise in 32 households in Q1 2023.

With the results of JICMAIL's pilot study released in October 2022, this report aims to wrap up the most recent findings from the industry currency for mail, crucially answering the following key questions for planners and measurement practitioners:

- 1. How much attention does the average piece of Direct Mail, Business Mail, Door Drop or Partially Address Mail attract?**
- 2. Does JICMAIL's existing panel measurement methodology provide a credible route for ongoing mail attention measurement?**
- 3. How can the attention results from JICMAIL's panel be validated against other data sources?**
- 4. What else do we know about the contextual backdrop to mail engagement in the home?**
- 5. How can mail attention data be factored into mail pricing and planning decisions?**

Ian Gibbs

Director of Data Leadership
and Learning, JICMAIL





Why should JICMAIL care about attention?

Much has been written about the exact definition of attention and the approaches that should be taken to quantify it. This report is not intending to cover each of these approaches in detail when they have been covered so ably elsewhere ([this attention literature review](#) from ThinkBox is a great place to start; as is this piece from [Royal Mail Marketreach](#); along with the work of [Karen Nelson-Field of Amplified Intelligence](#); and [Mike Follet of Lumen](#).)

Instead, while acknowledging that various practitioners espouse the virtues of neuro-science, AI and facial coding in measuring attention, JICMAIL has to work with a definition that is both practical to measure and scalable enough to introduce attention measurement across its entire panel of 1,000 UK households a month. It is for this reason, that like many other channels, attention in this context is being expressed in terms of time-spent directly looking at, or engaging with, mail.

Like many media practitioners, JICMAIL subscribes to the views popularised in Daniel Kahneman's Thinking Fast and Slow. The human brain has two systems for processing information and stimuli: System 1 deals with 'thinking fast.' It is unconscious, instinctive and emotive. In the marketing world, brand advertising builds emotional connections between consumers and brands, creating the shortcuts in the purchase decision making process that allow emotional brand considerations to over-ride rational purchase considerations like price and availability.

System 2 on the other hand, deals with 'thinking slow.' It is considered, deliberate and rational. It happens at the conscious level and takes effort from the consumer. Delivering rational advertising messaging that helps consumers make decisions closer to the point of purchase is an example of when System 2 processing might be important in the world of marketing comms. Delivering complex information related to financial services (as the upcoming FCA Consumer Duty

regulations are so concerned with) or big-ticket high-consideration products and services also crucially requires a degree of thinking slow to enable key messaging to be conveyed more clearly.

High attention ad platforms intuitively feel well suited to System 2 thinking. A direct fixing of the human gaze upon ad messaging is deliberate and conscious and well aligned to a number of key marketing objectives.

For many, attention is a proxy metric for effectiveness – a KPI that should be optimised against when planning for campaign success where campaign outcomes are not immediately measurable or obvious. With JICMAIL already measuring twelve commercial outcomes following campaign exposure (from voucher redemption, to store football, web visits and brand conversations), it could be argued that there is no need for such a proxy measure where real effectiveness data is present. However, as an industry currency owned by the sell-side and buy-side of the channel, it is incumbent upon



However, as an industry currency owned by the sell-side and buy-side of the channel, it is incumbent upon JICMAIL to ensure that the mail channel is conversant in the same language as all other media channels, providing an important view on the role of mail in the attention economy.”

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Attention is one crucial missing piece of the measurement jigsaw covered in JICMAIL's 2022 [Mind the Measurement Gap](#) whitepaper and corresponding roundtable of industry experts. This report looks to provide compelling new data to help start plugging those gaps in planner's campaign measurement framework.



The approach

JICMAIL's year-long programme of attention measurement has taken in four key stages of work – the results of the first two of which were released at JICMAIL's [annual conference](#) at PwC in October 2022.

Stage 1

An attention pilot study conducted on half of the JICMAIL panel for the month of June 2022. 1,500 mail items were measured across 500 households, with attention self-reported by panellists using a series of time-bands (determined by a pre-pilot survey) that appear after each mail interaction is logged by panellists across a 28 day period.

Stage 2

A quality assurance exercise in which PwC assessed the validity and robustness of the pilot study methodology and findings. In addition, JICMAIL and PwC worked up a range of cross platform attention efficiency comparisons using agency-supplied ad rate data and publicly available attention data for other media channels.

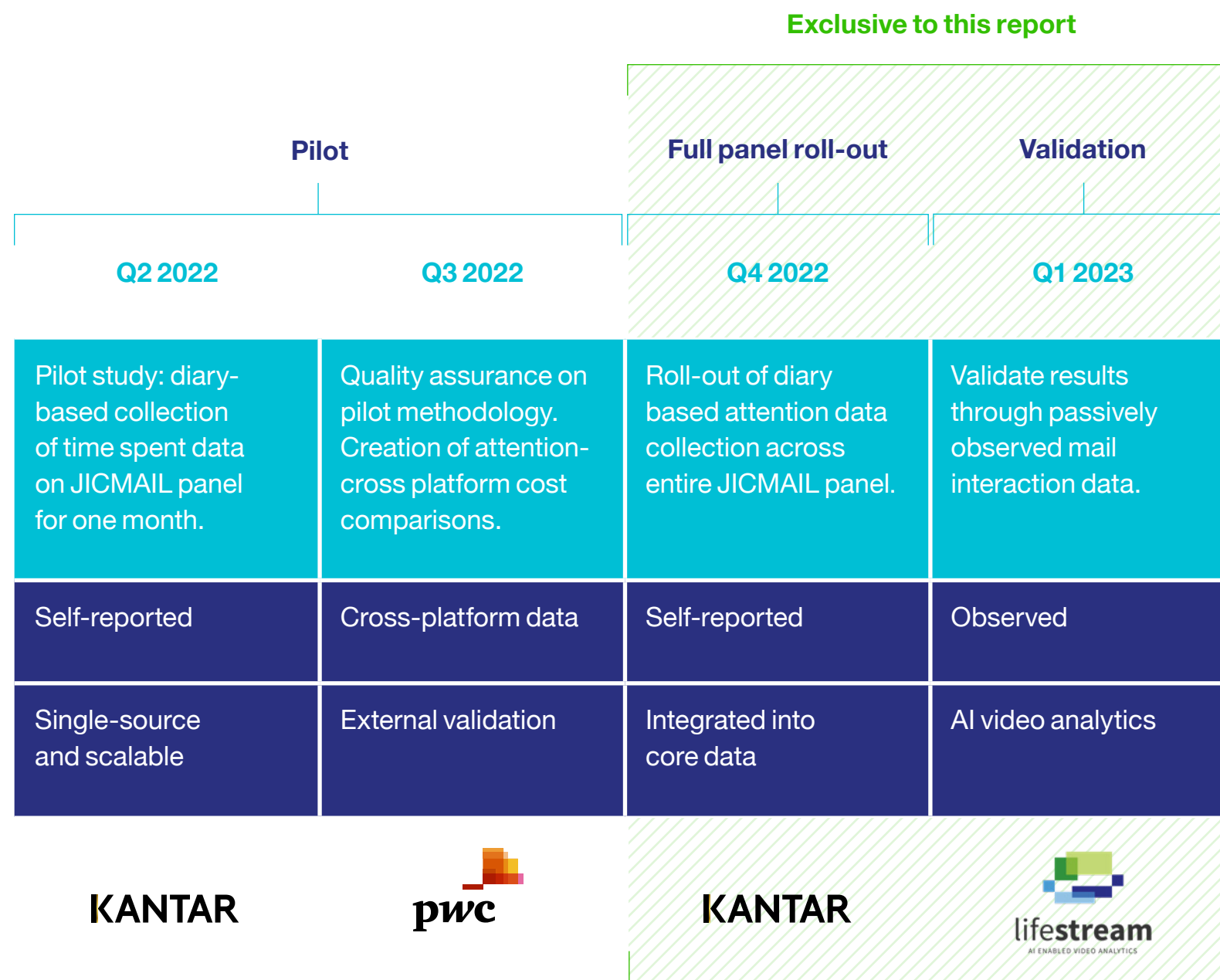
Stage 3

A full-scale roll-out of the pilot study methodology across JICMAIL's 1000-strong panel for the entirety of Q4 2022. With the pilot study results having passed PwC's quality assurance exercise and being well received by the buy and sell side of the market, and in addition, evidence from the pilot that the additional time-spent data collection task did not detrimentally impact panellist burden, JICMAIL had the confidence to proceed to full attention measurement.

Stage 4

To provide an additional layer of results validation, the in-home video-analytics company Lifestream was commissioned to directly observe mail attention in 32 households (30 households for seven days each, and 2 for the full 28 days each). While it is expected that self-reported and observed data sets will produce different results, the broad attention trends observed are intended to add context and weight to the understanding of mail attention in the home.

JICMAIL Attention Measurement Road Map





CHAPTER 1

The time we spend with mail





The time we spend with mail

Mail attention is fundamentally dictated by the type of mail channel deployed by advertisers looking to achieve specific campaign objectives.

The average piece of Business Mail is interacted with for **150 seconds** on average across a **28 day period**; Direct Mail for **108 seconds**; Partially Addressed Mail for **64 seconds** and Door Drops for **46 seconds**.

The ranking of attention between the four different mail types mirrors that seen with other JICMAIL engagement metrics such as frequency of interaction and lifespan, and is reflected by the varying price points of these channels. Highly targeted warm mail communications containing relevant existing customer information generate more direct attention than more widely targeted colder acquisition formats such as Partially Addressed and Door Drops. Yet at the same time Door Drops cost less than it takes to deliver Addressed Mail.

To characterise different mail types as having high and low attention does a disservice to the channel however. At 46 seconds, the amount of time spent with a Door Drop dwarfs that of time spent with the average [digital ad impressions](#) or [standard TV spot](#), several times over.



Average time spent with mail across 28 days (seconds)

150s

Business Mail



108s

Direct Mail



64s

Partially Addressed



46s

Door Drops





A new perspective on magazine and catalogue engagement

Magazines and catalogues accounted for 10% of mail volumes tracked by JICMAIL in Q4 2022. As ad channels which straddle a hybrid role between content platform and advertising medium they can play a unique role in the consumer path to purchase. Their tactile nature and coffee-table appeal means that they occupy quite a different space to the other mail types tracked by JICMAIL in terms of engagement.

Magazines and catalogues are formats that consumers can feel at ease putting on prominent display in the home. They don't need to be filed away or pinned to the pile of vouchers on the noticeboard. As such their relatively more permanent presence in the home has seen the average magazine generate over five and a half minutes of attention across and 28 day period, and catalogues just over three minutes.

10%

Magazines and catalogues accounted for 10% of mail volumes tracked by JICMAIL in Q4 2022.

Average time spent across 28 days
(minutes:seconds)

05:32

Magazines



03:06

Catalogues



Source: JICMAIL Item Data Q4 2022 n=498 magazines and 581 catalogues



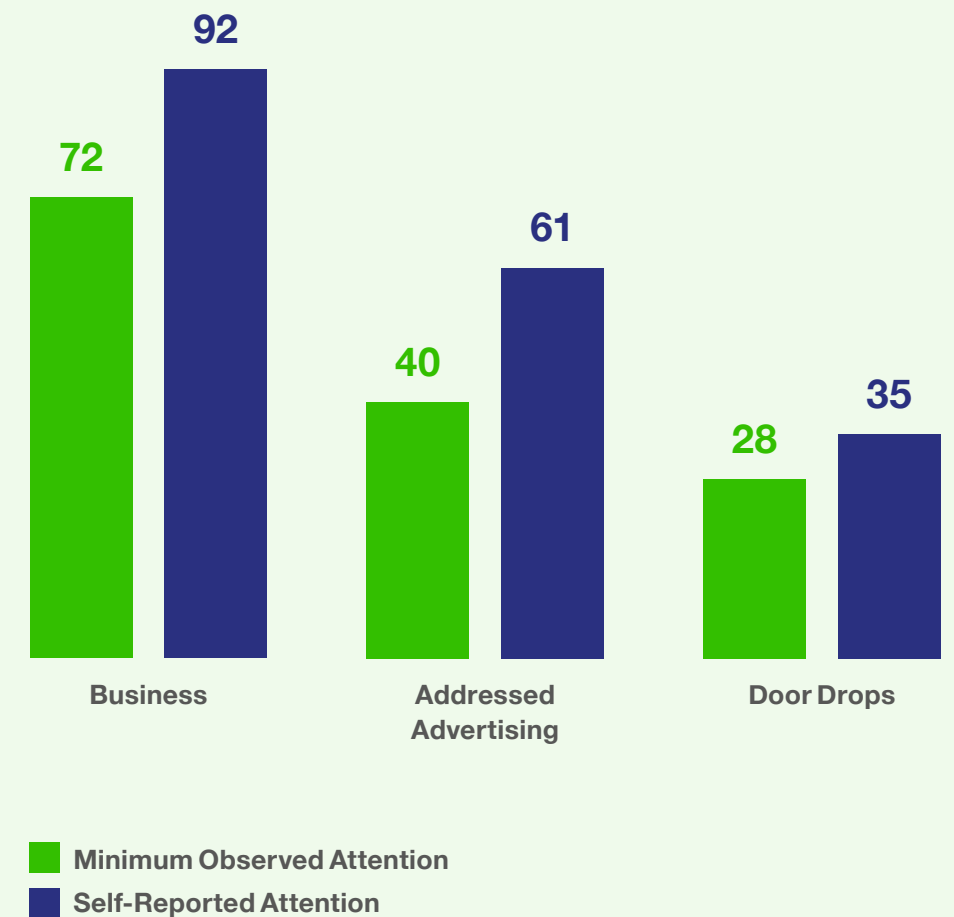
Validating mail attention metrics

Assessing the ability of the JICMAIL panel to accurately self-report how long they spend with mail is a step of vital importance in the attention measurement journey. Through the in-home video analytics company Lifestream, video cameras were placed in 32 households in the location where the panellist primarily sorts through their mail every day (for example, the kitchen, living room or home office). Video analytics software automatically codes consumer interactions with their mail, enabling us to generate a passively observed minimum time-spent figure with which to compare to the those numbers self-reported by panellists through the JICMAIL diary app.

Passively observed data sets invariably differ from self-reported data sets. It is a widely recognised phenomenon in media research that it is generally a hard task for consumers to recall and record their media behaviours accurately, meaning that passive data is the holy-grail when conducting validation exercises.

However, the difference between the two approaches were reassuringly limited when it comes to mail attention. For Door Drops, the two approaches only yielded a difference of 7 seconds. For Addressed Ad Mail the difference was more pronounced: 40 seconds over the course of a week from the observed data vs 61 seconds from the panel. For Business Mail, there was also about 20 seconds difference between the two figures. It is worth noting that the video-analytics work only recorded attention in a single location in the home. Given that mail moves around the home throughout its lifespan, the true passive number is likely to be even closer to the JICMAIL self-reported number, hence the observed number being framed as “minimum observed attention.”

Time spent with average mail item across 7 days (seconds)



Observed sample: n=146 Addressed Advertising; 86 Door Drops and 26 Business Mail Items. Source: Lifestream

Self Reported sample: n=5,024 Direct Mail; 2,369 Door Drops and 4,379 Business Mail items; Source: Kantar



Validating mail attention metrics (Continued)

Given the scale of the difference expected and given the lower sample sizes involved with the observed data, the two numbers were relatively aligned to each other, giving us confidence that:

- a. **In the context of media attention, JICMAIL’s panel is reporting at a realistic level, producing time spent metrics that operate in the magnitude of tens-of-seconds above the half-minute level, as opposed to seconds or milli-seconds worth of attention.**
- b. **The attention relationship between Addressed Mail and Door Drops in that attention is higher with the former, holds true across both data sets.**
- c. **Panellists are very accurate at recording Door Drop time spent in particular.**
- d. **The high degree of accuracy noted with the self-reported JICMAIL panel data set is likely a result of high overall panel compliance plus JICMAIL’s unique bottom-up approach to measuring mail interactions as close to the point of mail engagement as possible.**

Mail attention measurement methodology comparison

	Panel	Video Analytics
Methodology?	Self reported	Observed
Attention measured in...	All locations	One location
Attention measured across...	Core JICMAIL physical interactions	All interactions
Phasing	Ongoing since Q4 2022	Ad-hoc
Mail item sample size	'0,000's	'00's



Mail attention is driven by its tactile nature



 [Watch the video here](#)

“

There's something quite kinetic about it... the fact you have to touch it...”



Key considerations for marketers

01

Mail is unquestionably a **high attention channel**. Its longevity in the home and high interaction rates offer a huge potential to capture consumer attention throughout the course of the month.

02

Magazines and catalogues offer a particular opportunity to **stretch attention further** in the home.

03

The JICMAIL panel are broadly accurate at self-reporting their mail attention – particularly when it comes to Door Drops. Planners should have confidence in drawing on the core panel data for **enhanced attention planning**.



CHAPTER 2

Why attention matters for mail





The link between mail effectiveness and attention

The reason why practitioners are increasingly interested in planning on attention, becomes very clear when quantifying the attention of high effectiveness mail items.

While the average Direct Mail item is looked at for 108 seconds on average, DM which prompts a commercially beneficial outcome for a brand typically generates attention between two and three times higher than this average.

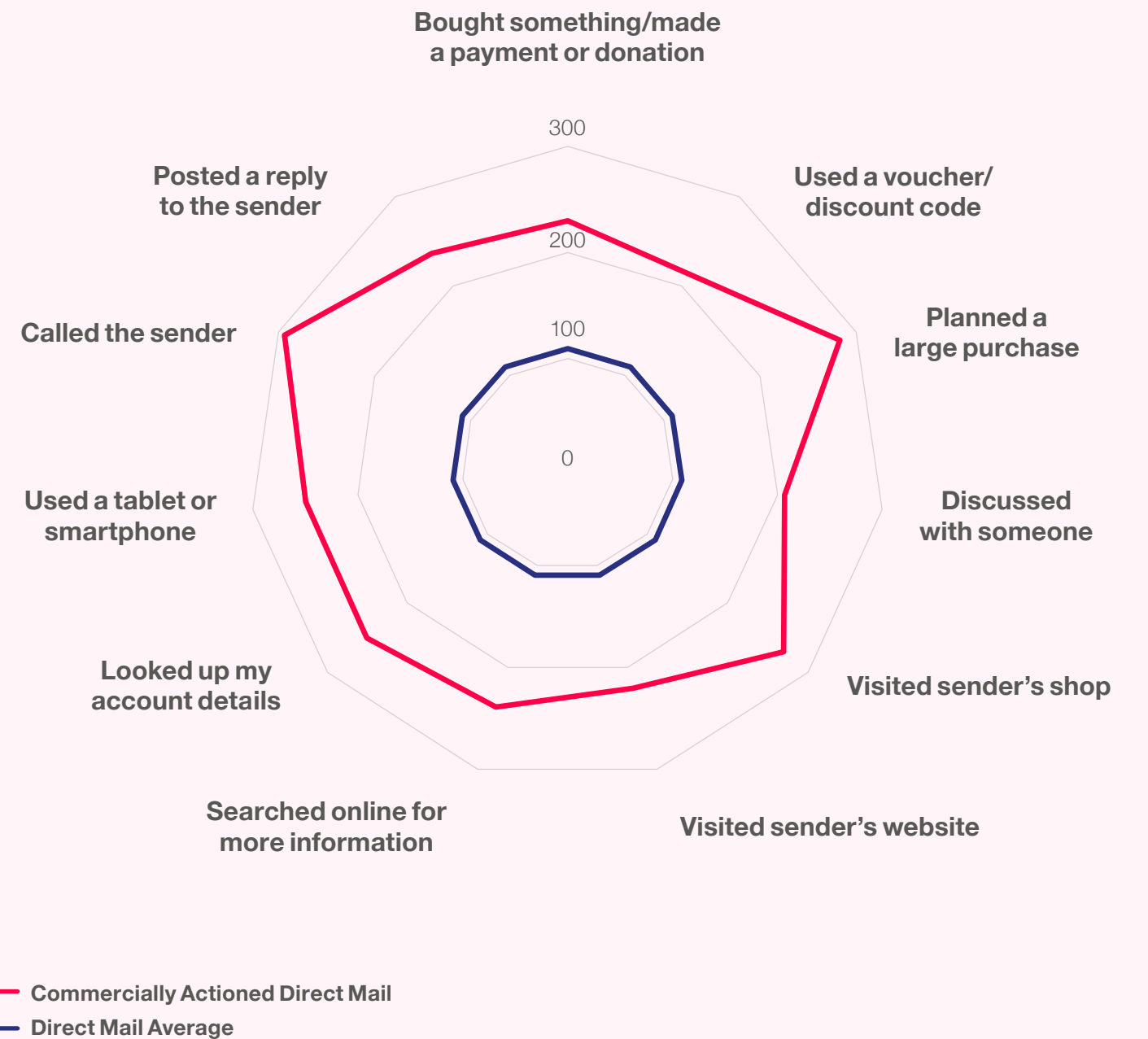
Caution must be taken when inferring causality between high attention mail and commercial effectiveness. Simply optimising towards attention while failing to acknowledge other key planning considerations such as targeting, audience, creative content, and crucially campaign objectives, is unlikely to yield effective results. However, if these other planning considerations have been taken in to account then at the very least, attention becomes a useful metric to plan against, and at the most it becomes a leading indicator of effectiveness.

It should be noted that 31% of Direct Mail prompts a commercial action within JICMAIL's 28 day tracking time frame. The value of the attention generated by mail items which do not prompt one of these actions must be considered in the context of upper funnel and brand effects such as those covered in The Shape of Attention Mining paper published in WARC last year.

The Direct Mail Attention Effectiveness Multiplier:

x2-x3

Direct Mail Attention vs Commercial Effectiveness (time spent across 28 days – seconds)



Source: JICMAIL Item Data Q4 2022 n=5,024 Direct Mail Items



Attention linked to full funnel effectiveness for Direct Mail

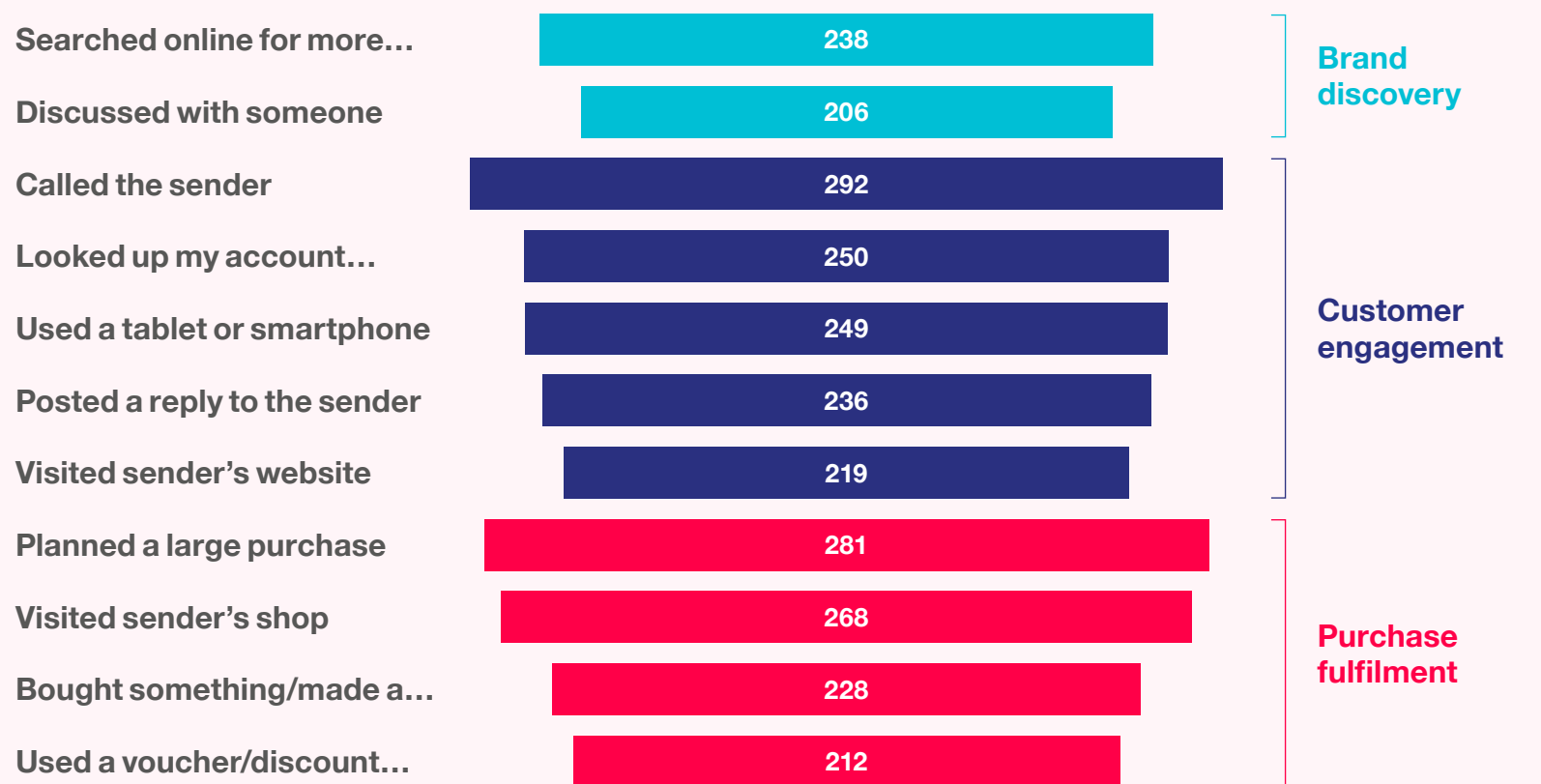
High mail attention is linked to mail effectiveness at all stages of the customer journey – from brand discovery to customer engagement to purchase fulfilment.

In particular, mail that prompts calls to advertisers, account look ups and shop visits records high attention levels.

Mail that is being used to plan a large purchase tends to record higher attention than mail that is used to prompt an immediate purchase.

Higher consideration products and services (i.e. big ticket items such as holidays and mortgages) which prompt consumers to at least plan a large purchase if they are not able to immediately financially commit, will naturally require consumers to spend more time with the mail item in question as they consider all options in the purchase decision making process.

Direct Mail Attention vs Commercial Effectiveness (time spent across 28 days – seconds)



Source: JICMAIL Item Data Q4 2022 n=5,024 Direct Mail Items



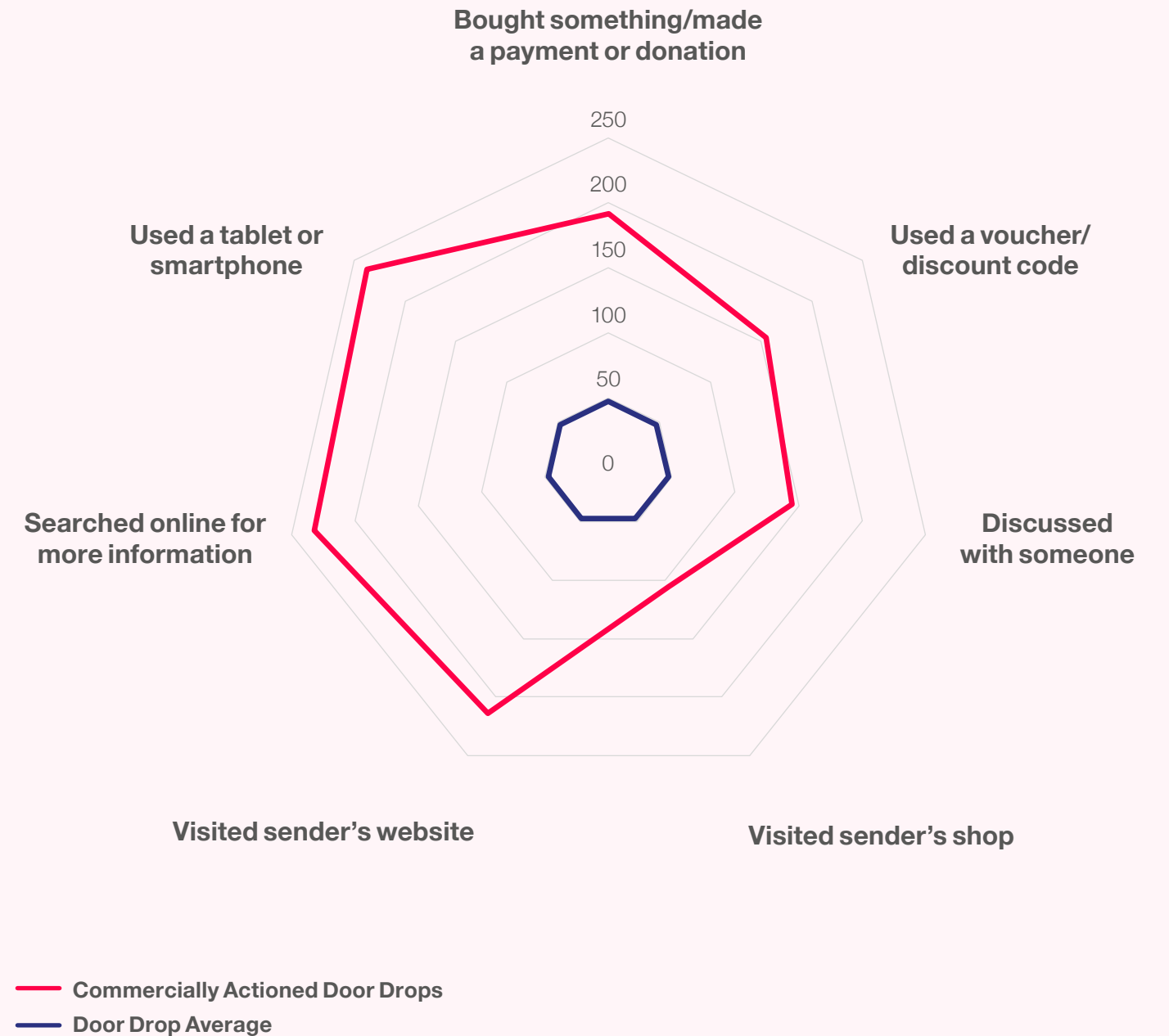
Significant Door Drop attention effectiveness multiplier

The commercial effectiveness attention dynamic is as present for Door Drops as it is for Direct Mail. If anything, the effectiveness multiplier is even greater, with Door Drops that drive commercial outcomes for brands typically commanding between three to five times the attention of the average Door Drop.

The Door Drop Attention Effectiveness Multiplier:

x3-x5

Door Drop Attention vs Commercial Interaction



Source: JICMAIL Item Data Q4 2022 n=2,369 Door Drop Items

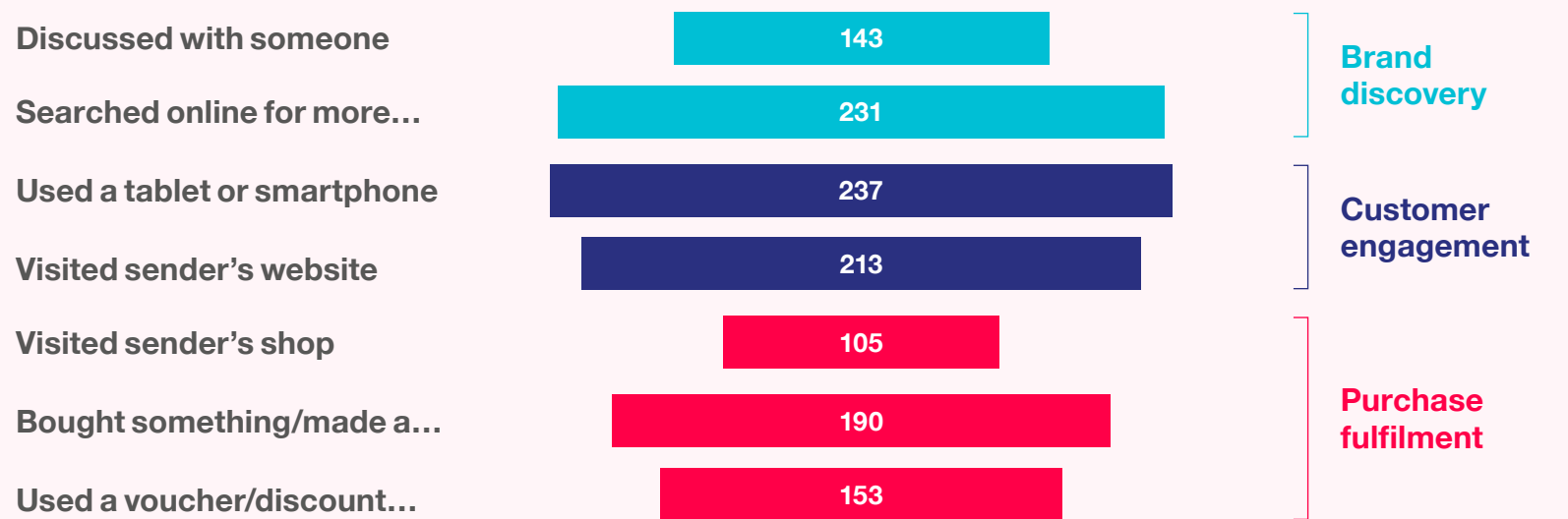


Door Drop attention and digital effectiveness

As with Direct Mail, high attention Door Drops are associated with a range of effects throughout the customer journey.

There is a notable digital effectiveness dynamic also associated with high Door Drop attention: items which prompt online searches for more information, tablet and smartphone usage and specific advertiser website visits are among the highest attention Door Drop items tracked by the JICMAIL panel.

Door Drop Attention vs Commercial Effectiveness (time spent across 28 days – seconds)





How long do people spend responding to mail?

Given the high levels of attention paid to digitally effective mail items, it comes as no surprise that in terms of time spent taking individual actions, using a computer to go online comes out on top. According to the observed Lifestream data, items which prompted web usage, did so for over five and a half minutes on average, while the figure sits at a minute and a half for smartphone usage. Calls to advertisers also prompted a similar amount of time spent to online: nearly five minutes in total.

The fact that the 5.5 minutes time-spent figure for using a computer is a simultaneous exposure figure provides a key consideration for planners and creatives. The rich content potential of mail should be complimentary to that found online, not duplicative. With mail providing the initial stimulus, content should look to inspire action amongst those of an inquisitive nature, while the information offered online should be additive and in-depth.

No media exists in isolation. There is an increasingly common fallacy in media planning that as growing amounts of purchase fulfilment happens online, then so too should ad budgets follow. With an offline channel like mail not only driving digital traffic, but doing so for a significant amount of time per session, there is clear evidence that a broad multi-channel strategy is as important as ever in driving campaign outcomes, and furthermore that attribution models that give too much credit to digital channels in driving digital activity need to be reviewed urgently.

“No media exists in isolation. There is an increasingly common fallacy in media planning that as growing amounts of purchase fulfilment happens online, then so too should ad budgets follow.”

Mail attention also while... (minutes:seconds)

05:33

Going online



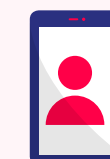
04:53

Making a call



01:36

Using a smartphone



00:33

Writing on / about mail



00:29

Talking about mail



00:06

Tearing off a voucher



Base = items on which each individual action is taken; Source: Lifestream



Relevant mail appeals to an inquisitive nature



[Watch the video here](#)

“

If I'm going to be sent something about an area of my life where I can make savings and it's relevant to my life, then I do like to receive that kind of mail.”



Voucher redemption: does attention matter?

The lowest attention commercial action prompted by mail is the tearing-off of vouchers. A purely kinetic action that requires little effort, it takes just six seconds on average to tear off a voucher.

A low attention commercial action does not necessarily mean limited commercial effectiveness however. While it might take 6 seconds to retain a voucher, 15% of the Lifestream sample claim to have used a voucher delivered by a Door Drop in the last few weeks, and 21% claim to have done so for Direct Mail delivered vouchers and special offers.

Attention must clearly be evaluated on the basis of the desired commercial outcome and judged within the context of a realistic timeframe for response.



The lowest attention commercial action prompted by mail is the tearing-off of vouchers.”



00:06

Attention when looking at mail while tearing off a voucher (seconds)

15%

have used a voucher / special offer delivered via a Door Drop in the last few weeks

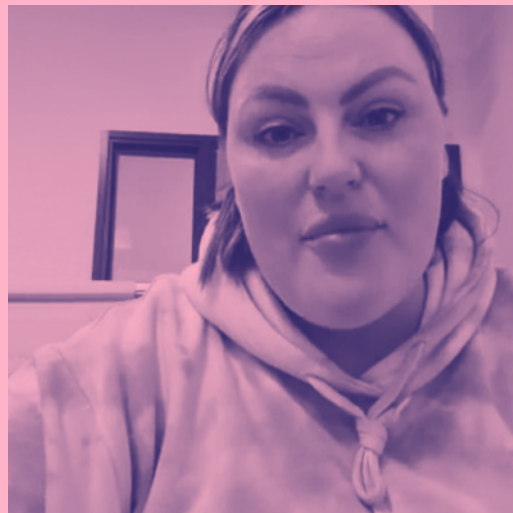
21%

have used a voucher / special offer delivered via Direct Mail in the last few weeks

Base = items on which each individual action is taken; Source: Lifestream



What our panellists say about offers and discounts



[Watch the video here](#)

“

If I'm looking for something in particular and I receive a mailshot including certain deals, I will always look because I always like to find the best deal.”



Key considerations for marketers

01

Mail attention is linked to commercial effectiveness. Typically there is a **x2 to x3 multiplier for time spent** with commercially effective Direct Mail items. The same is true for **Door Drops** which have an even higher attention effectiveness multiplier of **x3 to x5**.

02

Mail prompts significant amounts of time online, with over **five minutes of website usage** on average generated by items prompting digital traffic. Mail doesn't just drive response, it drives customer engagement with owned channels.

03

Some commercial actions don't need long to take effect. It **only takes 6 seconds to tear off a voucher** from a mail item, but over a fifth of respondents had used vouchers in the last few weeks.



CHAPTER 3

Mail attention in context





Where is mail primarily interacted with?

The observed Lifestream panel were asked to self-declare about the location where they primarily tended to interact with and sort through their mail.

Most commonly, panellists were sorting through their mail in the kitchen or at the front door or hallway close to the point of delivery in to the household. After that, the home office / work desk and the dining table were equally popular locations, followed by the living room.

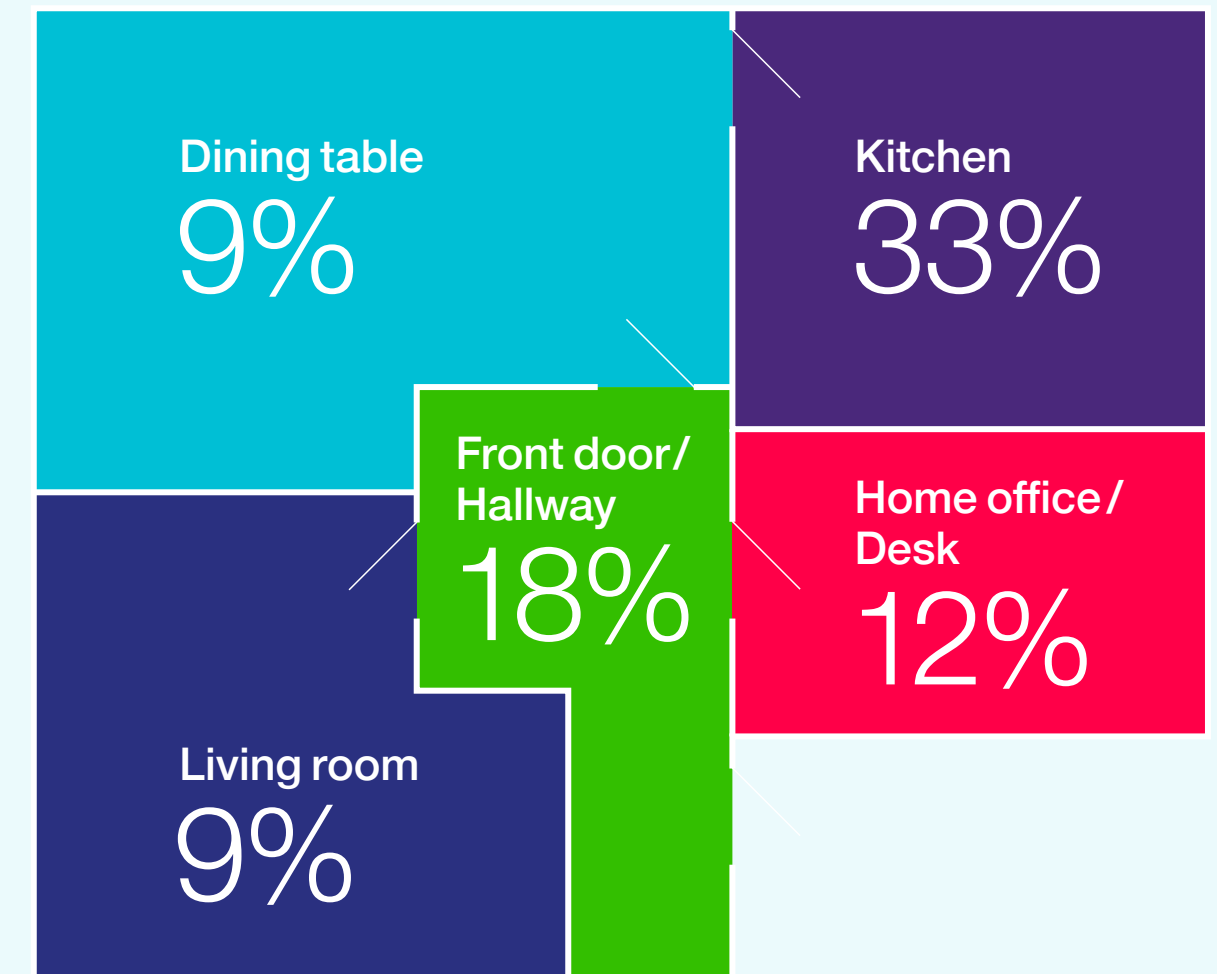
The way in which mail flows through the household was dissected in great detail in Royal Mail Marketreach’s 2015 paper [The Private Life of Mail](#). In the words of Marketreach, the physical nature of mail means that from the moment it enters the household it changes the environment – and that these changes fundamentally drive mail’s effectiveness at shifting consideration and response.

As mail flows through the household it is interacted with, filtered, discussed, actioned – and crucially, paid attention to – in different ways. Some of these household locations are described as mail ‘holding’ areas where mail is kept before being dealt with (e.g. the front door or hallway); some are described as mail ‘pile’ areas where mail is kept while it awaits action (such as the dining table or desk); and some are described as mail ‘display’ areas where useful or important items are stored and displayed (such as in the kitchen or living room). To assess how attention varies by context is a key consideration for planners who must ask themselves where they want their mail to be taken to in the household – a question they are unlikely to have asked themselves about other advertising media.



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Preferred location for sorting through the mail in the home



Observed sample: n=405 mail items; % of mail items displayed;
Source: Lifestream

Remaining 19% sort mail in other household locations



Attention varies by location

If an advertiser’s mail makes it as far as a ‘display’ area like the Kitchen or Living Room then they will reap the rewards of high consumer attention: over 40 seconds on average. Mail ‘pile’ areas such as the dining table or home office / desk on the other hand offer reasonable levels of attention of 25–26 seconds on average.

It is worth noting that even a mail ‘holding’ location like the Front Door / Hallway can generate a healthy levels of attention at 21 seconds on average.

The question of whether an advertiser has any control over where their mail is paid attention to, is partially answered by studying the mail types commonly interacted with by location.

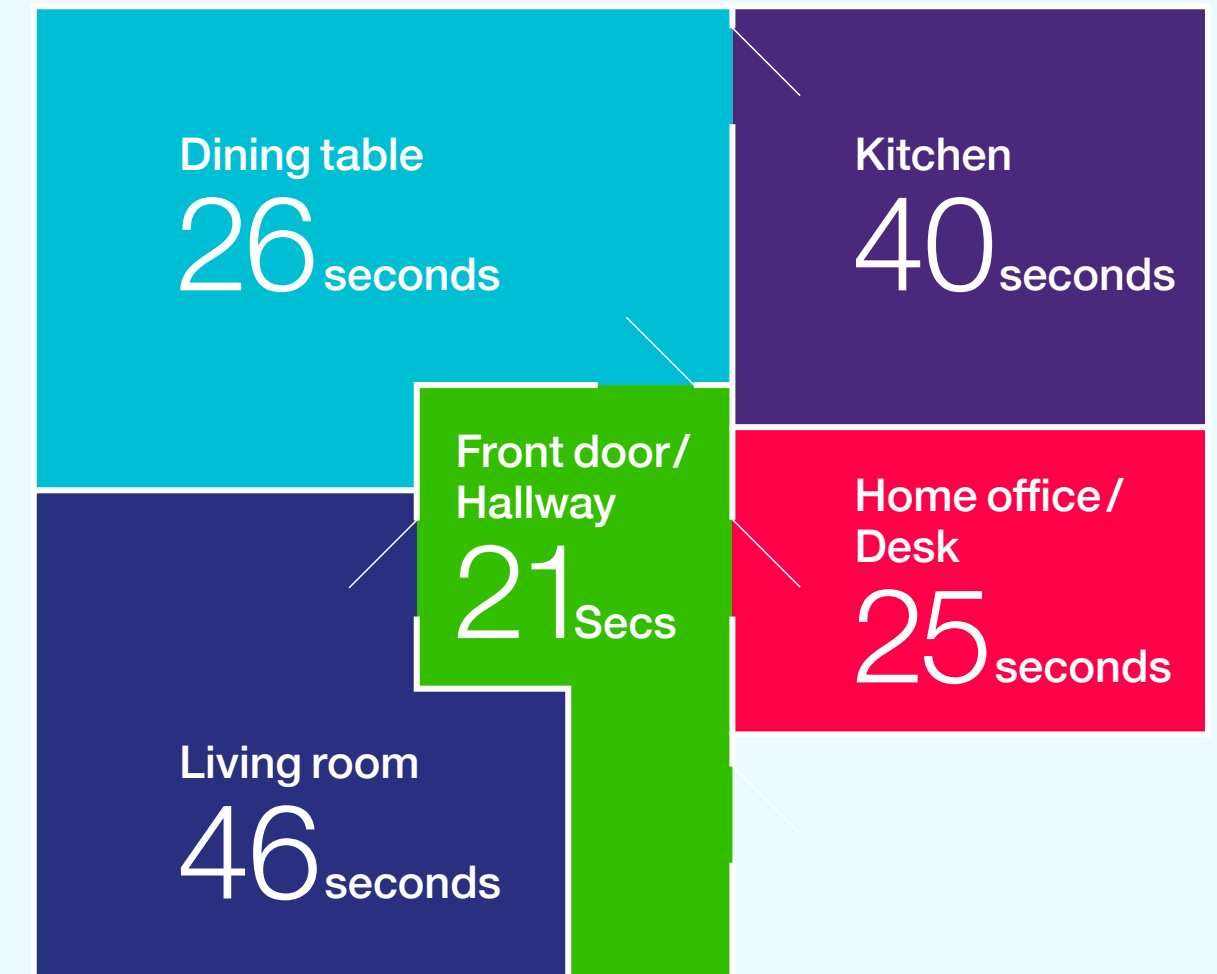
Either way, the location of mail in the home can play a crucial role in how it primes consumers to respond to advertising messages.



The question of whether an advertiser has any control over where their mail is paid attention to, is partially answered by studying the mail types commonly interacted with by location.”



Time spent with mail (7 days average) by location (seconds)



Observed 7 day sample: n=361 mail items; % of mail items displayed; Source: Lifestream















Consider the contextual relevance of your mail

Although based on a smaller / qualitative sample, the Lifestream data offers a sense of the types of mail content that are capturing consumer attention in different household locations.

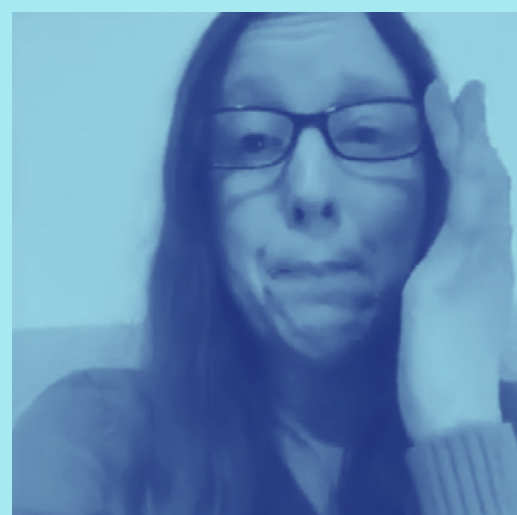
Items with contextual relevance from retailers (including grocers) and restaurants / takeaways sit in the kitchen, whereas mail from high street banks and the government tends to be found in the home office / desk. Important medical information and requests for donations from charities are kept front-of-mind in the living room; while local information and offers and discounts are kept to hand by the hallway / front door.


The key questions for planners is to ask the questions of where they want their mail to be in the household in order to maximise attention, and in turn how they can deploy different campaign messaging and contextual relevance to influence this decision.

	Kitchen	Front door/ Hallway	Home office / Desk	Dining table	Living room
Sector	Retail 	Retail 	Tradesperson 	NHS 	Charity 
	Tradesperson 	Banking 	Banking 	Retail 	Medical / NHS 
	Restaurant / Takeaway 	Medical 	Government / Council 		Government / Council 
Content	Product / Service info Local info QR code	Product / Service info Offers & discounts Local info	Product / Service info QR code Offers & discounts	Product / Service info Local info	Donation request Product / Service info Special offers



What our panellists say about attention by location



 [Watch the video here](#)

“

I like to look at my mail either in the hallway where the post comes through, or I will do it in the kitchen.”



Key considerations for marketers

01

The kitchen is the most popular place to interact with mail and provides the second most **attention-rich household location** (after the living room). Understanding how to gain access to this key mail display area is a vital consideration for planners.

02

While a less popular room to interact with mail, once mail gets to **the living room** it commands the highest amount of attention vs all other household locations. For brands seeking enhanced mental availability, getting past the gateway to the living room is another important consideration.

03

Contextual relevance is key to determining where mail is interacted with – e.g. grocer and restaurant / takeaway mail in the kitchen vs banking and government / council mail in the home office / desk. Contextual relevance primes consumers in the consideration and purchase of products and services.



CHAPTER 4

Optimising for attention





The mail attention opportunity by sector

Given that this report has established that mail is a high attention channel, and that high mail attention is linked to commercial response, the next step is to establish what planners can practically do to shift the dial on this metric. In other words, to answer the question of which planning levers can be pulled to optimise on attention.

The opportunity to make more of the mail attention opportunity varies by sector. As the chart overleaf shows, mail from the government or local council, and mail from publishers tends to attract above average attention depending on whether Door Drops or Direct Mail are appearing on the plan. For government at least there is a clear weight of pre-determined importance that consumers assign to their mail which means that it is a relatively easy task to capture their attention. When it comes to delivering all important public awareness campaigns, or messages from the central departments which have significant financial consequences (e.g. HMRC or the DVLA), mail must be part of the media mix.

Retail and Online Retail advertisers, along with Medical / NHS mail are doing well at generating above average Direct Mail attention. During the cost-of-living crisis, customer promiscuity has been on the rise as household budgets have felt the pinch. Loyalty schemes and offers targeted at retaining existing customers in this space will receive the high attention associated with positive commercial response.



“

During the cost-of-living crisis, customer promiscuity has been on the rise as household budgets have felt the pinch. Loyalty schemes and offers targeted at retaining existing customers in this space will receive the high attention associated with positive commercial response.”

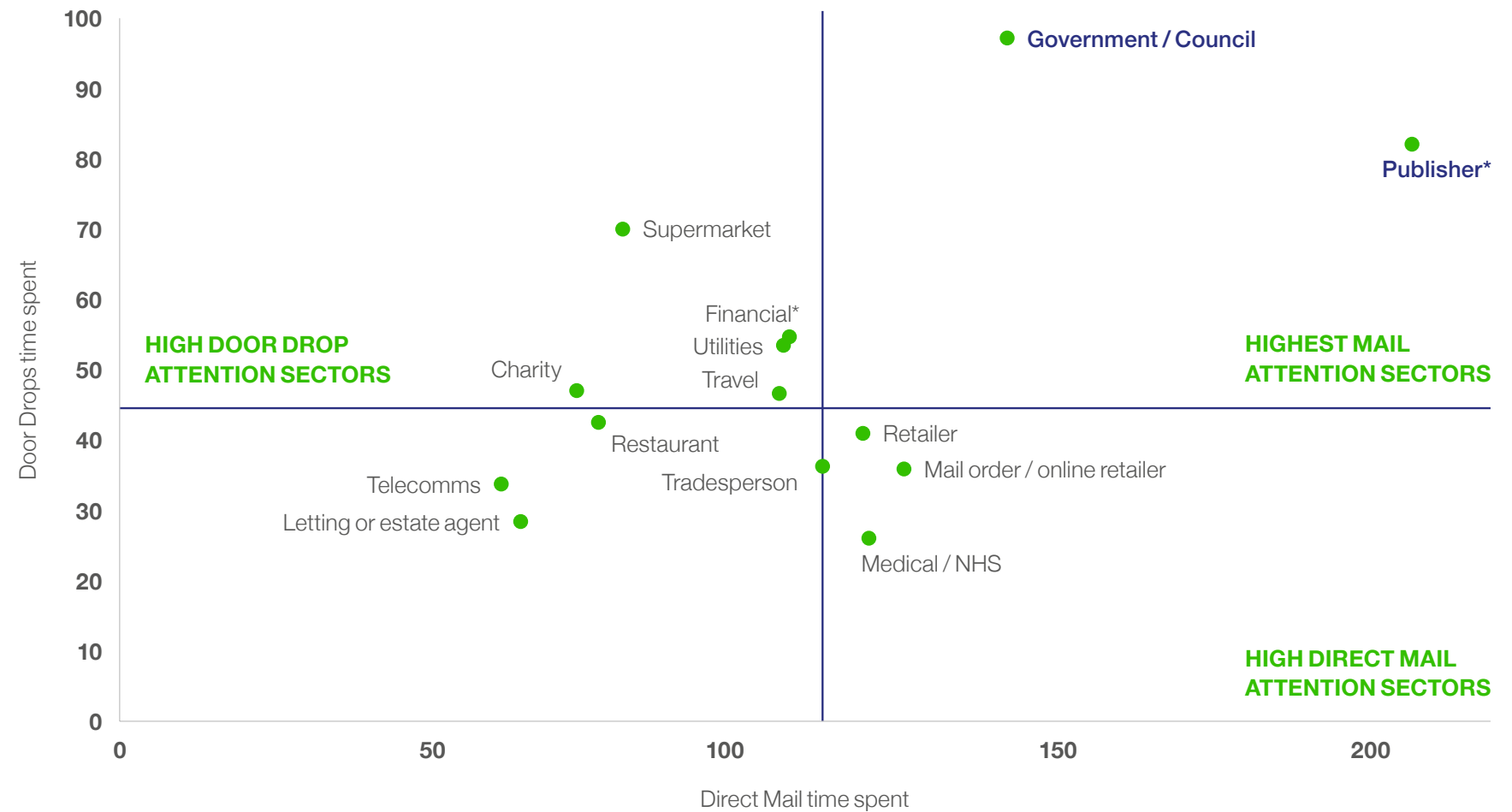


The mail attention opportunity by sector (Continued)

Supermarket, Utility, Travel and Charity advertisers on the other hand are proving adept at generating above average Door Drop attention – using the channel to acquire new customers at a time when performance marketing effectiveness is increasingly hard to come by. Advertisers in these sectors not currently vested in the Door Drop Channel should reconsider their media mix in this light.

For Telecoms, Letting / Estate Agencies, Restaurant and Tradesperson advertisers, below average attention is recorded for both Direct Mail and Door Drops. For these sectors more than any other, it is important to understand how to dial up time spent with mail.

Direct Mail and Door Drop Attention by Sector (seconds across 28 days)



Source: JICMAIL Item Data Q4 2022 n=10,669 mail items
*Caution: Low Door Drop sample size



Direct Mail content for attention

Broader content marketing combined with sharper conversion messages drives Direct Mail attention.



Direct mail that contains general news updates and articles along with information related to entertainment and activities will naturally require more time to engage with and to process. Unlike the majority of media channels, mail offers the chance to deliver rich tactile content experiences within a delivered impression.

For mail, the ad is the medium – in other words there is no surrounding media context (**such as website or magazine content**) from which to distract from ad attention. The result is a high attention content opportunity with full editorial control by the advertiser.

However, planners must capitalise on this content opportunity by delivering pointed response messages at the same time. For Direct Mail this comes in the form of a notification or reminder about an upcoming service or subscription renewal for example – a vital tool in customer retention.



Unlike the majority of media channels, mail offers the chance to deliver rich tactile content experiences within a delivered impression.”

Direct mail content	Seconds (Across 28 days)	Role
Notification/reminder 	155.06	Retention/Conversion
Information about entertainment or activities 	146.16	Content Engagement
News/updates/magazine articles 	145.55	Content Engagement

Source: JICMAIL Item Data Q4 2022 n=5,024 Direct Mail items



One stop mail attention



 [Watch the video here](#)

“

Everything is in one spot on that leaflet or flyer... I don't have to go searching.”



Door Drop content for attention

Acquisition related conversion messages combined with content marketing drives Door Drop attention.




As with Direct Mail, it is the combination of content style marketing with harder conversion messages that results in above average attention.

While news updates and articles generate over 100 seconds of attention across the month, specific conversion messages generate over a minute of attention on average.

Whether it be to drive footfall to specific events (such as store launches or sales in bricks and mortar retailers) or to drive sales through voucher redemption, the power of attention lends itself well to the natural role of Door Drops in acquiring new customers.



As with Direct Mail, it is the combination of content style marketing with harder conversion messages that results in above average attention.”

Door Drop Content	Seconds (Across 28 days)	Role
News / updates / magazine articles 	106.84	Content Engagement
Invitation / information about a specific event 	66.46	Footfall/ Conversion
Vouchers / coupons 	62.18	Acquisition/ Conversions

Source: JICMAIL Item Data Q4 2022 n=2,369 Door Drops



What do our panellists want to see from mail creative?



[Watch the video here](#)

“

Bright colours tend to draw your attention more... clear information... if something's a little bit too busy I might be quite quick to disregard it.”



Business Mail content for attention




Business Mail drives customer loyalty through a combination of content and special offers.

As the highest attention mail channel, Business Mail offers a huge opportunity to generate attention-based effectiveness amongst existing customers.

As with the other mail channels, content marketing is key, while for Business Mail, special offers and discounts tailored towards existing customers generates above-average attention. Building customer loyalty is crucial at a time when brand promiscuous consumers are chopping and changing their preferred brands. Rewarding loyalty through offers and discounts is one such way of doing this (although brands should also be conscious that the overuse of promotions can also create more price-sensitive customers).



Building customer loyalty is crucial at a time when brand promiscuous consumers are chopping and changing their preferred brands.”

Business Mail Content	Seconds (Across 28 days)	Role
Information about entertainment or activities 	335.61	Content Engagement
News/updates/ magazine articles 	254.93	Content Engagement
Special offers or discounts 	250.54	Loyalty/ Conversion

Source: JICMAIL Item Data Q4 2022 n=4,379 Business Mail items;



Mail quality reflects well on the advertiser



“

You feel if the company has invested in printing... it means they are quite committed.”



[Watch the video here](#)



Optimising mail attention by target audience

Attention is naturally derived from mail interaction, with each engagement opportunity offering the opportunity to add incremental time to the attention score. It is generally true therefore, that those audiences who engage with their mail the most, pay the most attention to it. On the chart below a diverse set of MOSAIC audiences ranging from Prestige Positions, to Transient Renters to Countryside Communities fall in to the top right quadrant signifying that they are both engaged with and attentive to their mail.

It is perhaps the outlier audiences that are of more interest to planners when it comes to planning for attention. If these outlier audiences have strong overlap with an advertiser's target audience, then there are some key considerations to bear in mind in the planning process.

The City Prosperity group – an audience of high income city dwellers tend to pay high levels of attention to their mail, but with below average interaction rates. As a potentially time poor group with busy lives and busy jobs, they have limited time to return to their mail. However, on the few instances when they do interact with their mail, they do so for a healthy amount of time. Clearly the key with this audiences is to catch attention as quickly as possible, and to deliver key messages as efficiently as possible – to prompt immediate engagement without the need for constant revisits to the mail item.



Tailoring content and offers through the insight offered through JICMAIL, coupled with a test-and-learn approach to ad measurement is key to unpicking how to drive attentiveness from these audiences.”





Optimising mail attention by target audience (Continued)

Higher interaction but lower attention groups include the older Vintage Value audiences and lower income Municipal Tenants audience. Within these groups, the attention opportunity is potentially not being maximised to its full potential. High levels of interaction provides a strong signal that these audiences have a degree of demand for relevant ad messaging, yet the lack of attention means that their demands are not being fulfilled as they should be.

Tailoring content and offers through the insight offered through JICMAIL, coupled with a test-and-learn approach to ad measurement is key to unpicking how to drive attentiveness from these audiences.

Attention vs Interaction by MOSAIC Group



Source: JICMAIL Item Data Q4 2022 n=10,669 Direct Mail, Door Drop and Business Mail items



Key considerations for marketers

01

Very few advertiser sectors are adept at commanding both Door Drop and Direct Mail attention – generally they are good at either one or the other. If attention matters, then planners must select the most **relevant channel for achieving time based KPIs**.

02

Direct Mail, Door Drops and Business Mail all generate consumer attention with a combination of **content-style marketing and harder conversion messages**. Whether that conversion message refers to acquisition, retention or loyalty, depends on the channel.

03

Generally, audiences who interact with their mail more, display higher levels of attention. There are notable exceptions however and planners should take care to **test and learn with their creative** accordingly.



CHAPTER 5

Mail attention in channel context



Solus attention to mail is high

In an era of media saturation and proliferation of advertising comms across an expanding array of channels and platforms, it is instructive to understand whether mail commands undivided attention or not.

Very few mail items were actually interacted with while engaging with other media channels during the in-home Lifestream research. Only 1% for example were looking at mail while watching the TV or listening to the radio. In practical terms, the high processing activity of reading text is not possible while doing something else, which may lead consumers to dealing with their mail before or after turning to other media.

This high level of solus attention commanded by mail speaks to the strength of the channel in delivering messages unaffected by background noise.

The most prominent simultaneous activity to happen while reading mail is conversing or socialising with other household members – a finding which supports JICMAIL’s key metric of Item Reach – a metric which takes in to account that mail is shared in the home.

Mail generates brand conversations – a powerful commercial effect that is as present on the core JICMAIL panel data as it is with the observed Lifestream data, again at remarkably similar levels of 14% of items. Advertisers seeking attention and influence should consider mail.

Percentage of mail items interacted with while also...

1%

Listening to the radio



1%

Making a call



1%

Watching TV



14%

Socialising / conversing



n=426 mail items; Source: Lifestream



Mail is an attention efficient channel

The amount of attention attracted by mail over the course of a 28 day period, completely reframes the conversation about the cost of the channel vs other media. By drawing on publicly available industry visual attention data from Lumen and TV Vision (measured with eye-tracking technology rather than a self-reported diary survey as with JICMAIL) and combining it with standard industry ad rates, it has been possible to calculate the cost of acquiring a minute of consumer attention in each media channel among ABC1 Adults.

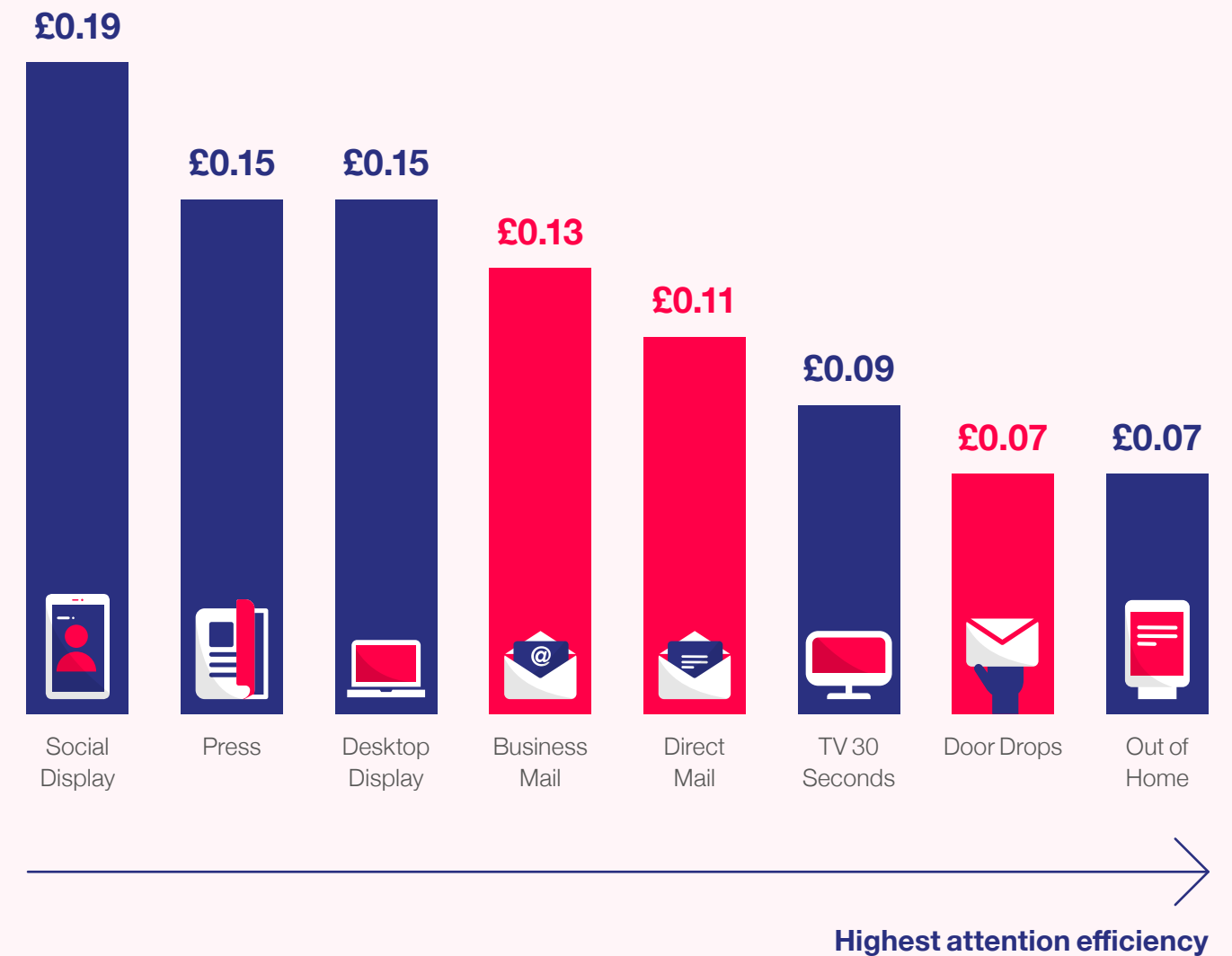
This approach was scrutinised and validated by PwC upon the release of JICMAIL's attention data in October 2022 and now shows that the three main mail channels are amongst the most cost-efficient media at capturing consumer attention amongst ABC1s.

Door Drops are revealed to be twice as attention efficient as Display.

Ubiquitous on almost every media plan, planners should re-appraise the value of using social display to generate attention with all mail channels far more cost efficient.

Quite simply, if attention matters to an advertiser, then mail has to be considered as part of the media mix.

Cost per minute: ABC1 Adults

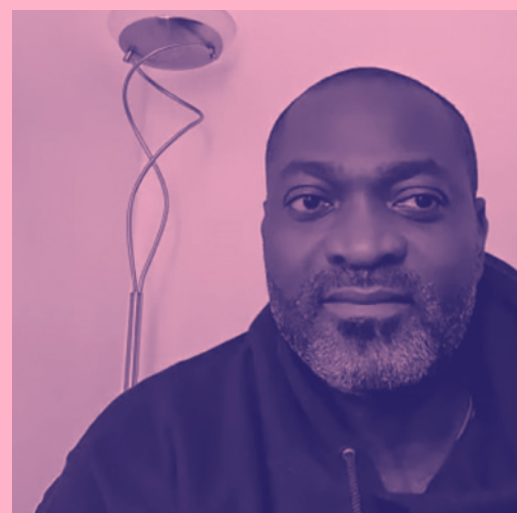


Source: JICMAIL Item Data Q4 2022.; Lumen; TVision; Kite Factory CPM data

Note: Attention is measured using an eye-tracking methodology for all channels apart from mail. Mail attention is a claimed metric measured using the JICMAIL diary survey and verified by observed video analytics data. Viewability and % Viewed metrics have not been taken into account as standard across this analysis.



Mail cuts through the digital noise



[Watch the video here](#)

“

A mail coming through the post [box] will demand your attention.”



Key considerations for marketers

01

Mail attention is generally a **solus activity**. Reading mail copy demands undivided attention – a trend which works to the benefit of advertisers communicating in-depth messages to consumers.

02

Conversing / socialising with other household members is a fairly common activity happening simultaneously with mail – confirming the reach multiplying nature of the channel.

03

Mail is highly attention efficient – generating time-spent at a cost-efficient rate comparable to many other media channels. Advertisers who care about attention have to pay attention to mail.



Key attention planning implications

1	<p>Mail is a high attention channel. The average Direct Mail item generates 108 seconds of attention across 28 days; Business Mail 150 seconds; Partially Addressed 64 seconds; and Door Drop 46 seconds.</p>	<p>Comparisons between panel data and observed data from have shown that the JICMAIL panel self-reports mail attention with a good degree of accuracy, particularly when it comes to Door Drops. Planners should have confidence in drawing upon the core panel data for enhanced attention planning.</p>
2	<p>Mail attention is linked to commercial effectiveness. There is a x2 to x3 multiplier for time spent with commercially effective Direct Mail items and a x3 to x5 multiplier for Door Drops.</p>	<p>Effective mail items (i.e. those which drive purchases, web visits and product discovery) have the dual benefit of providing a high attention opportunity in which to deliver and embed key brand messages.</p>
3	<p>Mail prompts over five minutes of website usage on average.</p>	<p>Mail doesn't just drive response, it drives customer engagement with owned channels. No media exists in isolation and mail's profound effects on driving attention in digital channels speaks to an 'attention rub' effect.</p>
4	<p>Location and contextual relevance are key drivers of mail attention. The Living Room and Kitchen are particularly high mail attention environments.</p>	<p>Planners should consider how to enter the gateway to these attention critical mail zones in the home. Contextual relevance is a factor (e.g. grocer and restaurant / takeaway mail in the kitchen vs banking and government / council mail in the home office / desk) Contextual relevance primes consumers in the consideration and purchase of products and services.</p>
5	<p>Mail attention is generally a solus activity.</p>	<p>Direct Mail, Door Drops and Business Mail all generate consumer attention with a combination of content-style marketing and harder conversion messages. Whether that conversion message refers to acquisition, retention or loyalty, depends on the channel.</p>



Thank You

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