

Thursday 21 November
@DMA_UK #dmaevents

/ Webinar: Elections – How Much Does Mail Matter?

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/ Welcome

Mark Cross, Engagement Director, JICMAIL

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/ How mail swept the board for political parties in the 2024 General Election

Amanda Griffiths, Head of Customer Communication Planning and Insight,
Marketreach

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LANDSLIDE

HOW MAIL SWEEPED THE BOARD FOR POLITICAL PARTIES IN THE 2024 GENERAL ELECTION

November 2024



EXPERTS PREDICTED 2024 WOULD BE THE 1ST TRULY DIGITAL GENERAL ELECTION



We wanted to understand what that meant for mail.

But to explore communications' impact on voters' behaviour, you have to run research during the election .

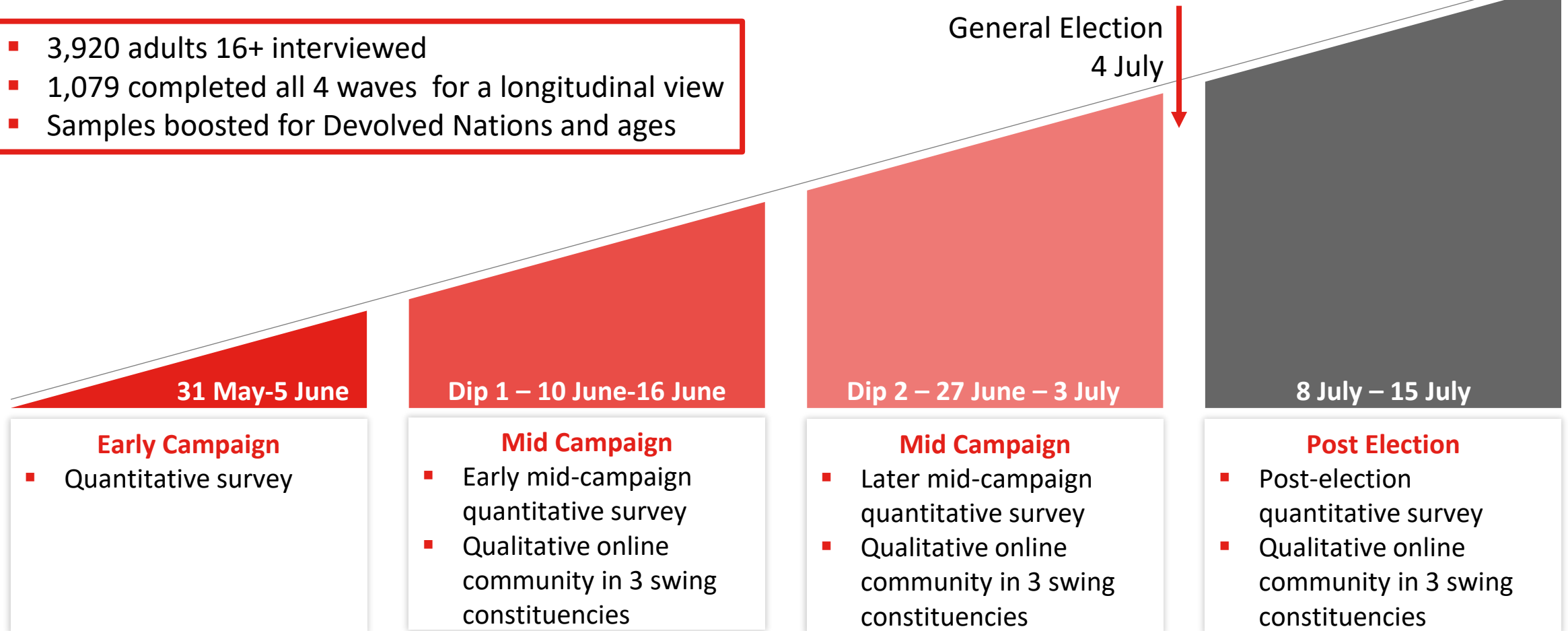
- When the Prime Minister called a snap election for July 2024, we had our research in field within a week.
- A nationally representative research of a scale and reach to explore the role Mail (Direct Mail and Door Drop) plays in UK election voting in 2024

Is this the TikTok general election?



MARKETREACH RAN IN DEPTH RESEARCH AT THE START OF, DURING AND AFTER THE ELECTION

- 3,920 adults 16+ interviewed
- 1,079 completed all 4 waves for a longitudinal view
- Samples boosted for Devolved Nations and ages




In total 3,920 UK adults 16+ completed at least one survey with 1079 respondents completing all 4 waves. The research included a sample of pre-voters, age 16-17 given their importance as future voters. Qualitative online communities ran in 3 'swing' constituencies, Crewe and Nantwich, Glasgow North and Norwich North.

Source: Royal Mail Marketreach, Thinks, How Mail Swept the Board for Political Parties, November 2024

This report proves once and for all, that any successful election communications strategy simply has to include mail.

Even – or perhaps especially – in a digital world.



A man with glasses and a beard, wearing a red t-shirt and blue jeans, is standing in a kitchen. He is leaning against a white countertop and looking down at a document he is holding. The kitchen has white cabinets and a window in the background. On the left side of the image, there are four thick, red, wavy lines that curve across the frame. The text is overlaid on the image in a bold, white, sans-serif font.

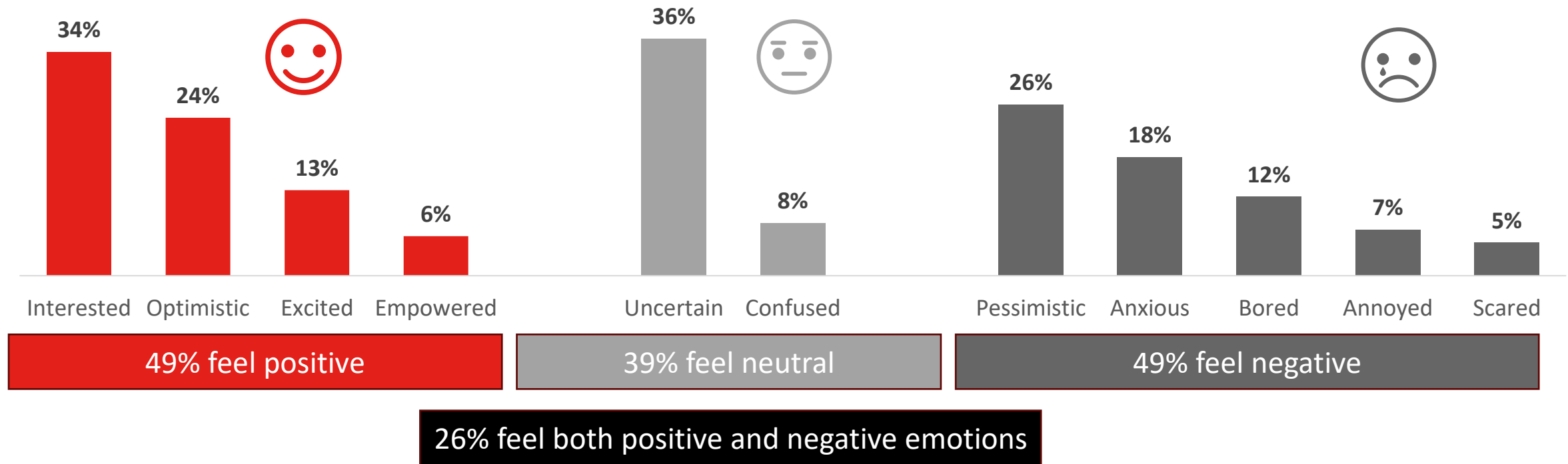
**TO START WE WANTED TO
UNDERSTAND THE ELECTION
ENVIRONMENT.
WHAT WAS THE NATIONAL
FRAME OF MIND?**

AT THE START OF THE CAMPAIGN, NEARLY HALF OF THE PUBLIC REPORTED FEELING 'UNCERTAIN'



Feelings towards the election

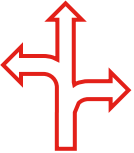



Showing % of respondents in the early-campaign wave selecting each option

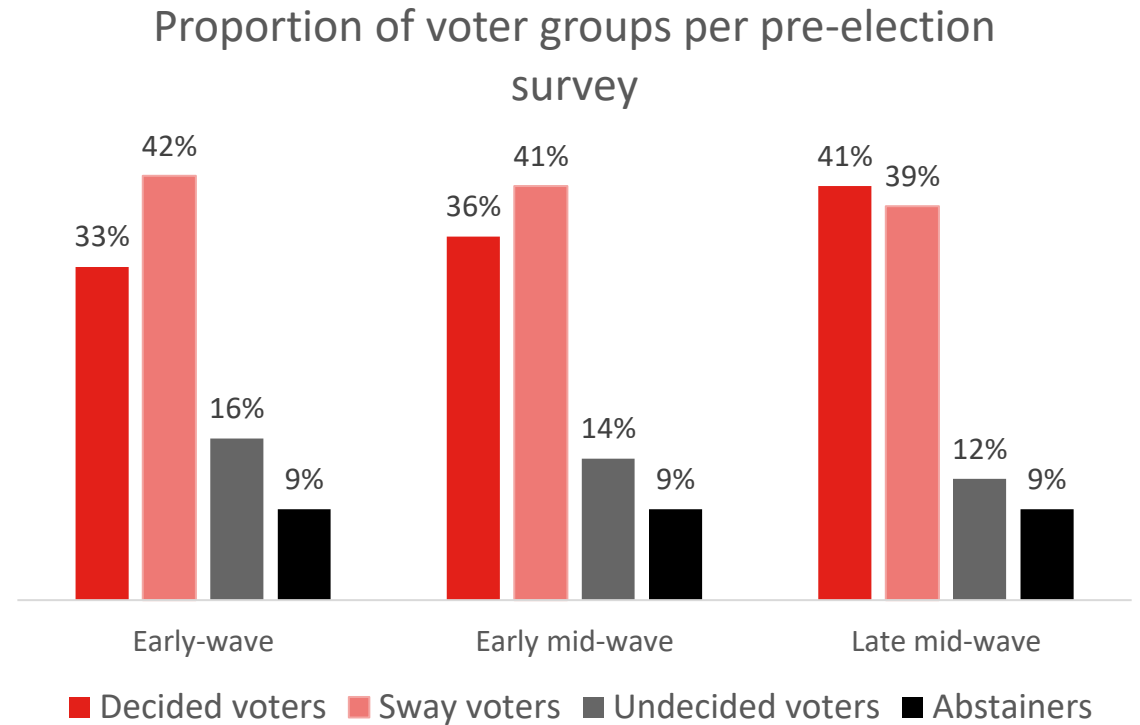


WE IDENTIFIED 4 KEY VOTER GROUPS



Undecided and sway voters, comprised over 50% of voters in each wave of research – a huge opportunity to influence voting

 <p>UNDECIDED VOTERS</p> <p>Those who don't know who to vote for.</p>	 <p>SWAY VOTERS</p> <p>Have decided who to vote for, but report that there is some chance they may change their mind.</p>
 <p>DECIDED VOTERS</p> <p>Have decided who to vote for, who report that there is no chance of changing their mind.</p>	 <p>ABSTAINERS</p> <p>Those who don't intend to vote.</p>





OUR FINDINGS

OUR FINDINGS: POLITICAL PARTIES WHO FORGET THE IMPORTANCE OF MAIL DO SO AT THEIR PERIL



01

Mail is the dominant medium

02

Mail is trusted, not suspected

03

Mail is considered, not ignored

04

Mail is the most engaging and most read medium

05

Mail is loved by all ages, and the most engaged with by younger voters

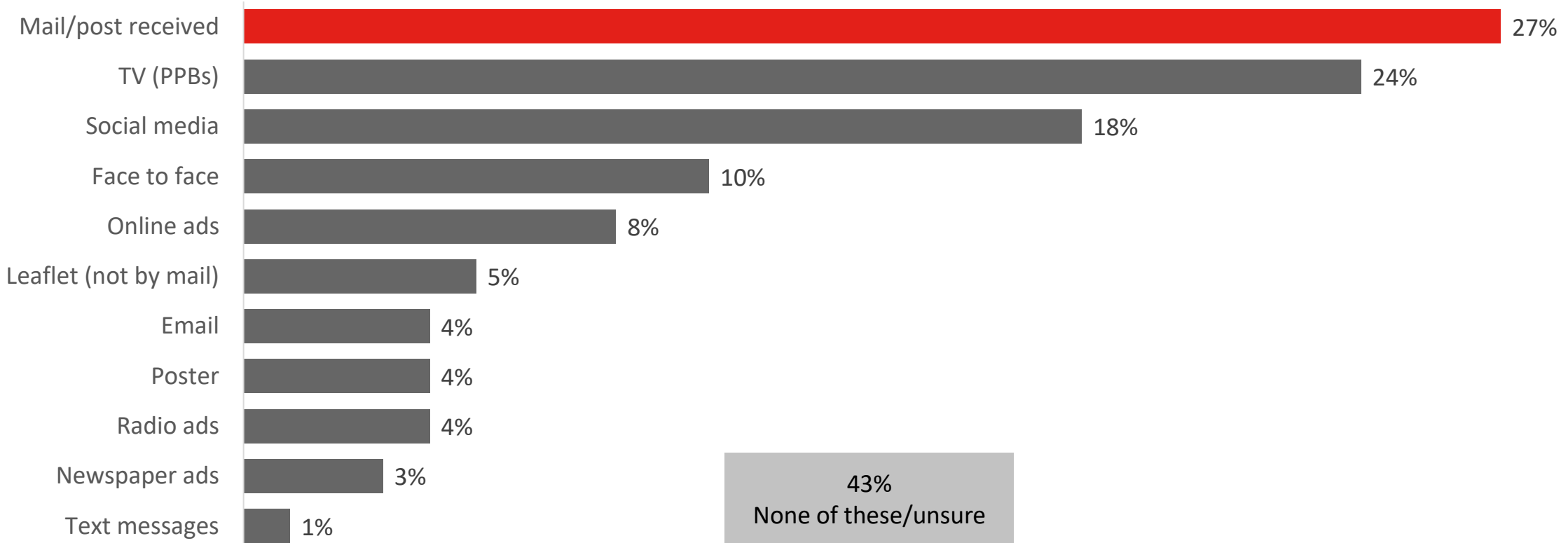
06

Mail became the most recalled campaign channel

1. MAIL HAD THE MAJOR IMPACT ON VOTERS' CHOICES IN THIS ELECTION



Most impactful channels in deciding which party to vote for
Showing % of voters placing each channel in their top 3



Source. Thinking about how you might hear or receive campaign information from political parties during the General Election, which of these you will find most useful in deciding how to vote. Please choose and rank your top 3. Base: All respondents in early-campaign survey who have heard/received information via each channel (n=312-1212).

WHAT MADE ELECTION MAIL THE DOMINANT MEDIUM

All voters

The only medium that gets through to all ages

Impactful

Mail stands out and grabs attention

Engaging

Most likely to be read, shared or talked about

Trusted

Almost twice as trustworthy as any other channel

Relevant

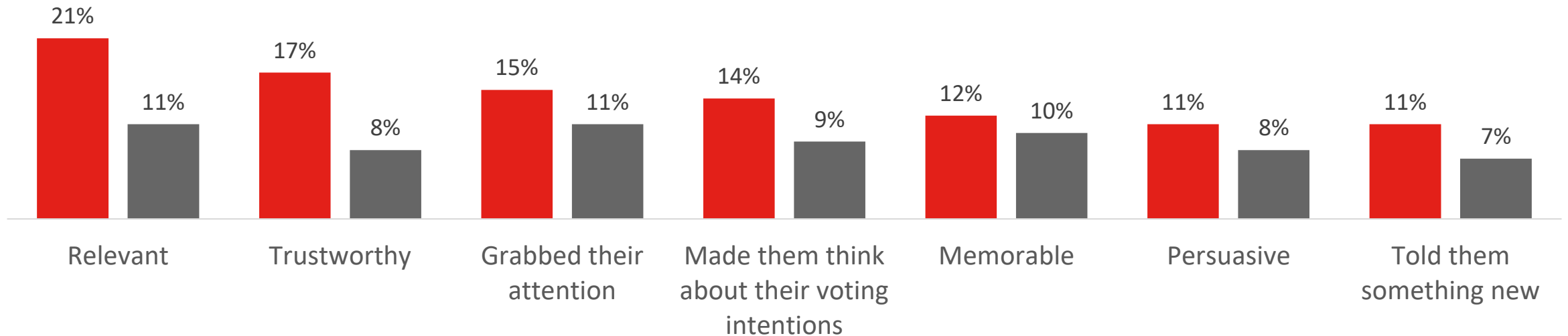
About issues voters care about; personal, local, significant

MAIL OUTPERFORMED OTHER CHANNELS FOR ATTRIBUTES THAT DRIVE VOTER CONSIDERATION



Views on information from channels
Showing % of respondents selecting each statement per channel

■ Mail ■ Other channels*




Equally true for both addressed and unaddressed mail



Source: Royal Mail Marketreach, Thinks, How Mail Swept the Board for Political Parties, November 2024

* Note, these figures are average across party political TV broadcast, social media, posters and online advertising



“
I actually think my feeling towards receiving information on the election by post has changed. I used to think it was annoying but now consider it to be enlightening/informative.
”

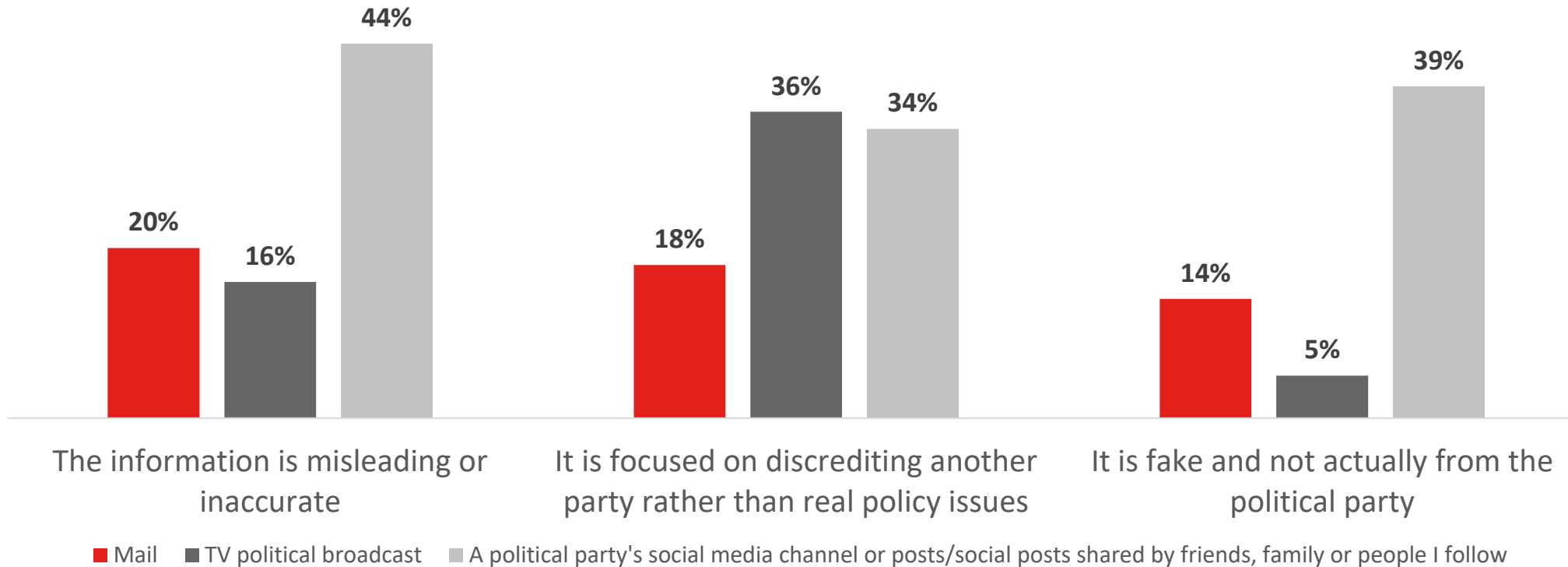
Female voter, 26-45 Crewe and Nantwich

2. MAIL IS TRUSTED, NOT SUSPECTED

Mail was most likely to be free of suspicions about fake news and AI. Least likely to be associated with discrediting other parties.



Concerns associated with channels: Showing % of all respondents selecting each channel in relation to each concern



Young people aged 16-19 are less likely than older respondents to associate trust concerns with mail

REASSURING VOTERS ABOUT THEIR CONCERNS

“

In future elections I'll be looking to mail and leaflets – they are more informative, trustworthy and approachable

”

Female, 16-25, Crewe and Nantwich



3. MAIL IS CONSIDERED, NOT IGNORED

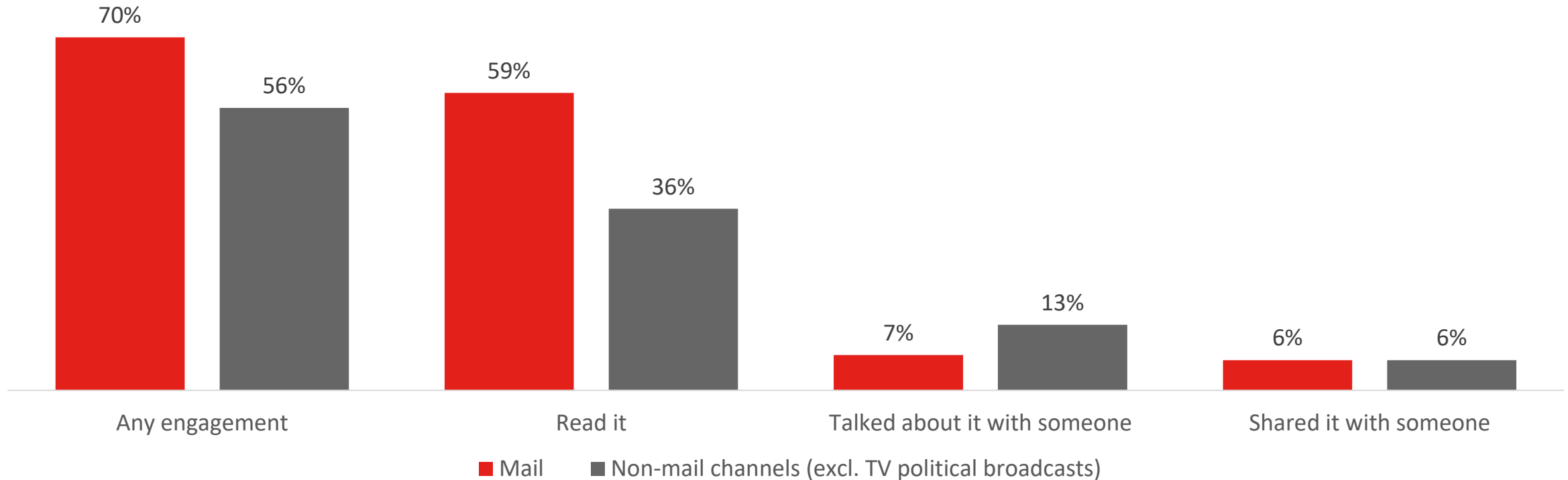


Mail makes voters think	<ul style="list-style-type: none">▪ More than 50% more effective at making them think about voting intention than other channels
Gives voters control	<ul style="list-style-type: none">▪ Mail can be read in their time and pace – and re-read when they want.▪ It can be easily retained – doesn't disappear as social can
Has standout	<ul style="list-style-type: none">▪ Stands out on the doormat. Not lost in a crowded feed or email inbox▪ Concise, visual, colourful, easy to identify
More local	<ul style="list-style-type: none">▪ The only medium that can be localised to constituency level▪ Content can be personalised

4. MAIL WAS THE MOST ENGAGING MEDIUM AND THE MOST READ



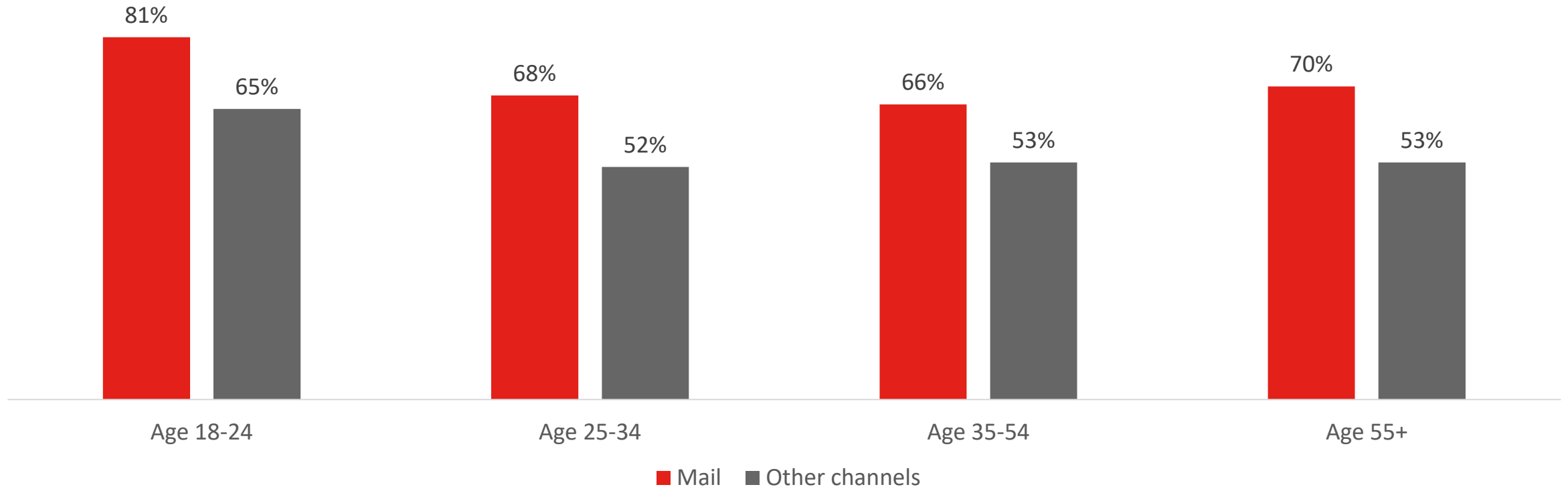
Actions taken related to political information received via mail and non-mail channels
Showing % of respondents selecting each option



5. ALL AGES ENGAGED WITH MAIL MORE THAN OTHER CHANNELS. THE YOUNG MOST OF ALL.



Actions taken related to political information received
Showing % of all respondents reporting some engagement



ELECTION MAIL IS INCLUSIVE – IT REACHES ALL VOTERS, WHILE OTHER MEDIA DON'T



- Even the youngest age groups show very high levels of engagement with mail.
 - Among 18-24-year-olds, 81% said they had engaged with mail during the run up to the election, higher than social media (72%), posters (67%), online advertising (64%) and party political broadcasts on TV (51%).
- More than a quarter of all voters reported that they kept mail packs until just before the election, giving it a very long shelf life.
 - 60% of 18-19-year-olds (new voters) kept any mail until a few days before the election versus an average of 27%.

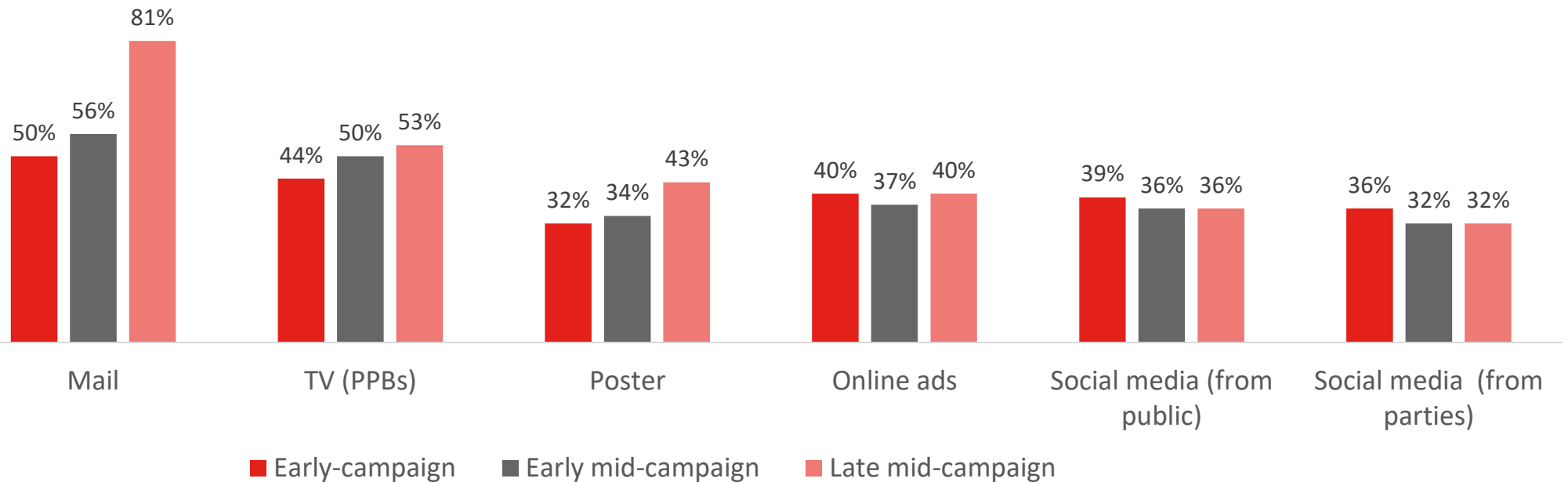
This long shelf life is a huge plus in an election where almost half of voters said they were considering changing their minds about their choice of party right up until polling day.

6. MAIL BECAME THE MOST RECALLED CHANNEL IN THE WEEKS BEFORE THE ELECTION



Reported channels for General Election campaigning

Showing % of all respondents that have received information from each channel once or more in the last week

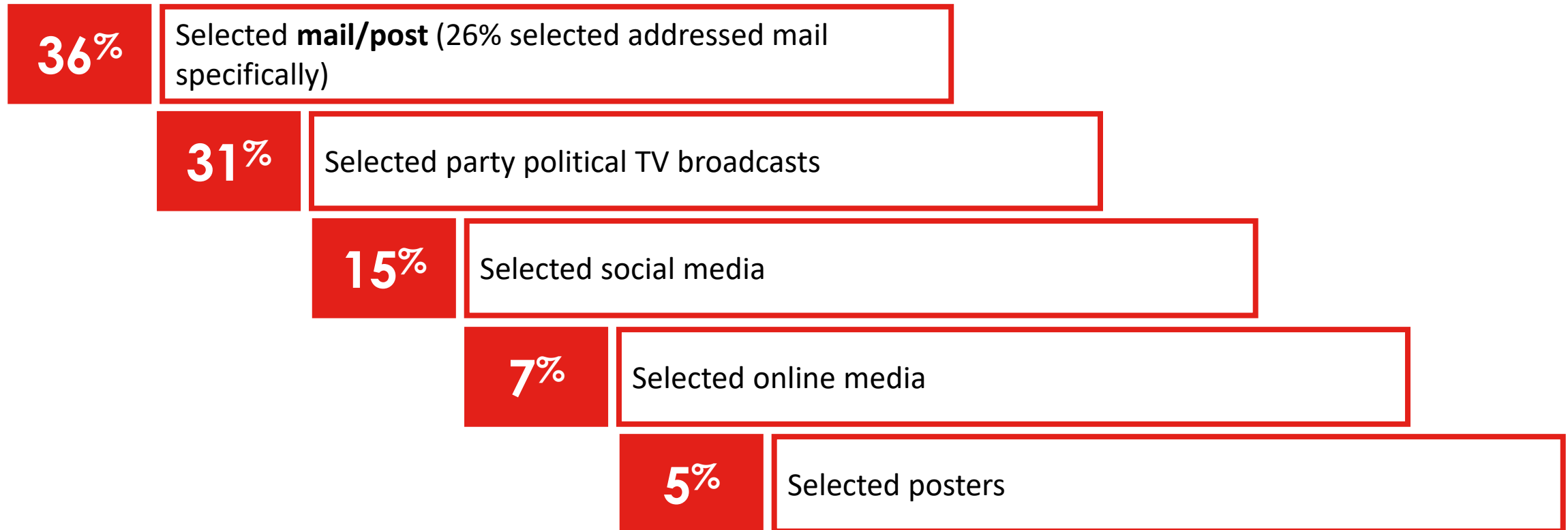


VOTERS CONSIDER MAIL THE MOST USEFUL CHANNEL FOR FUTURE ELECTIONS



Most useful sources for future elections

Showing % of respondents selecting each channel in their most useful channel





MAKING MAIL WORK HARDER AND SMARTER

My first steps for change

1. Deliver Economic Stability
2. Cut NHS waiting times
3. Launch a new Border Security Command
4. Set up Great British Energy
5. Crack down on antisocial behaviour
6. Recruit 6,500 new teachers

labour.org.uk/firststeps

Vote Labour Change

SCAN ME

“Colour-coded their policies which was helpful”

- Female voter, 45, constituency: Crewe and Nantwich

IT'S LIB DEM OR CONSERVATIVE IN WEST DORSET

- The Lib Dems beat the Conservatives here in recent council elections.
- The Lib Dems were a clear second place to the Conservatives here at the 2019 General Election.
- Labour have never won in West Dorset. Only the Lib Dems can beat the Conservatives this time.

CON 55%

LIB DEM 32%

LAB 9%

GREEN 4%

This was the result in West Dorset at the last General Election in 2019. Only a vote for Lib Dem Edward Morris can beat the Conservatives here.

Labour are in third place here

Sign up to help at: WESTDORSETLIBDEMS.UK/VOLUNTEER

FOR SCOTLAND

A STRONG AND EXPERIENCED VOICE TO SERVE OUR COMMUNITY

FIGHTING FOR REAL SUPPORT WITH THE WESTMINSTER COST OF LIVING CRISIS

WORKING TO BUILD A FAIRER, GREENER, INDEPENDENT SCOTLAND

REJOIN THE EUROPEAN UNION AND THE WORLD'S LARGEST SINGLE MARKET

STOP THE PRIVATISATION OF OUR NHS

“I have received one ... which was quite useful as it had a lot of information in it and was very detailed”

- Female voter, 16-25, constituency: Norwich North

THE IMMIGRATION ELECTION
Only Reform UK will freeze immigration...

IMMIGRATION NEEDS REFORM

- ✓ **Freeze Non-Essential Immigration**
Smart immigration will target those with the essential skills that we need, such as doctors.
- ✓ **Stop the Boats and Leave the ECHR**
Only Reform UK will turn the boats back to France and leave the undemocratic ECHR.
- ✓ **Stop the Illegal Working Scandal**
We will ensure rules around illegal working are robustly enforced and impose penalties on companies and directors that breach the rules.

@ReformParty_UK
@ReformUK
@TheReformPartyUK
WWW.REFORMPARTY.UK
0800 414 8525

“It was a simple and concise message. A paragraph explaining what they support and a paragraph which argues what they’ve done”

- Female voter, 45, constituency: Crewe and Nantwich

“I found this one easier to read as it was big text”

- Female voter, 16-25, constituency: Crewe and Nantwich

MAKING MAIL EFFECTIVE – WHAT VOTERS VALUE FROM MAIL



Wanted by voters

Voters expect and anticipate mail in an election

Timing is crucial

Mail was frequently kept to read and held until election day

Targeting is powerful

Messaging can be personalised to the most local level

Age is important

Election mail is valued by every age – newest to oldest voters

Design is crucial

Colour coding and images help communication and memory

Tone matters

Mail helps explain policies and facts, and avoids negativity

Integration is important

Mail works best as part of an integrated plan – national & local

Consider sustainability

Consider sustainability at every stage of design and production

DON'T JUST TAKE OUR WORD FOR IT

“

Elections are national, sometimes even global, events. But in our Parliamentary system, they are first of all local ones. We want a direct, emotional connection between ourselves the candidates and ultimately the MP. Mail arrives at an actual address not an IP address; a physical postcode, not a digital identifier; something I can hold in my hand, not something only held, briefly, in the mind's eye. This report is a welcome dose of reality, a happy corrective.

”

Andrew Marr - Journalist, Broadcaster and Commentator



THE RESULTS OF THIS RESEARCH ARE VERY CLEAR



Despite expectations that this would be a 'digital' Election campaign, mail was the single dominant medium.

- Mail is *more trusted* than other election media
- Mail *stands out* from other mediawsx
- Mail is the *only* medium that reaches all voters
- Mail is held onto *for longer* than other media
- Mail *makes* voters think
- Mail is *personal*
- Mail is *popular* with young people



Marketreach can provide the insight, expertise and tools to ensure mail delivers success in all your campaigns

An aerial photograph of a large solar farm. The rows of solar panels are arranged in a grid that recedes into the distance. On the right side of the image, there is a prominent red and white diagonal striped pattern overlaid on the solar panels. In the top left corner, there are two small blue structures, possibly storage containers or equipment. The overall scene is captured from a high angle, looking down at the solar panels.

Thank you

/ What JICMAIL tells us about mail effectiveness during the election

Ian Gibbs, Director of Data Leadership and Learning, JICMAIL

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unleash the magic of mail



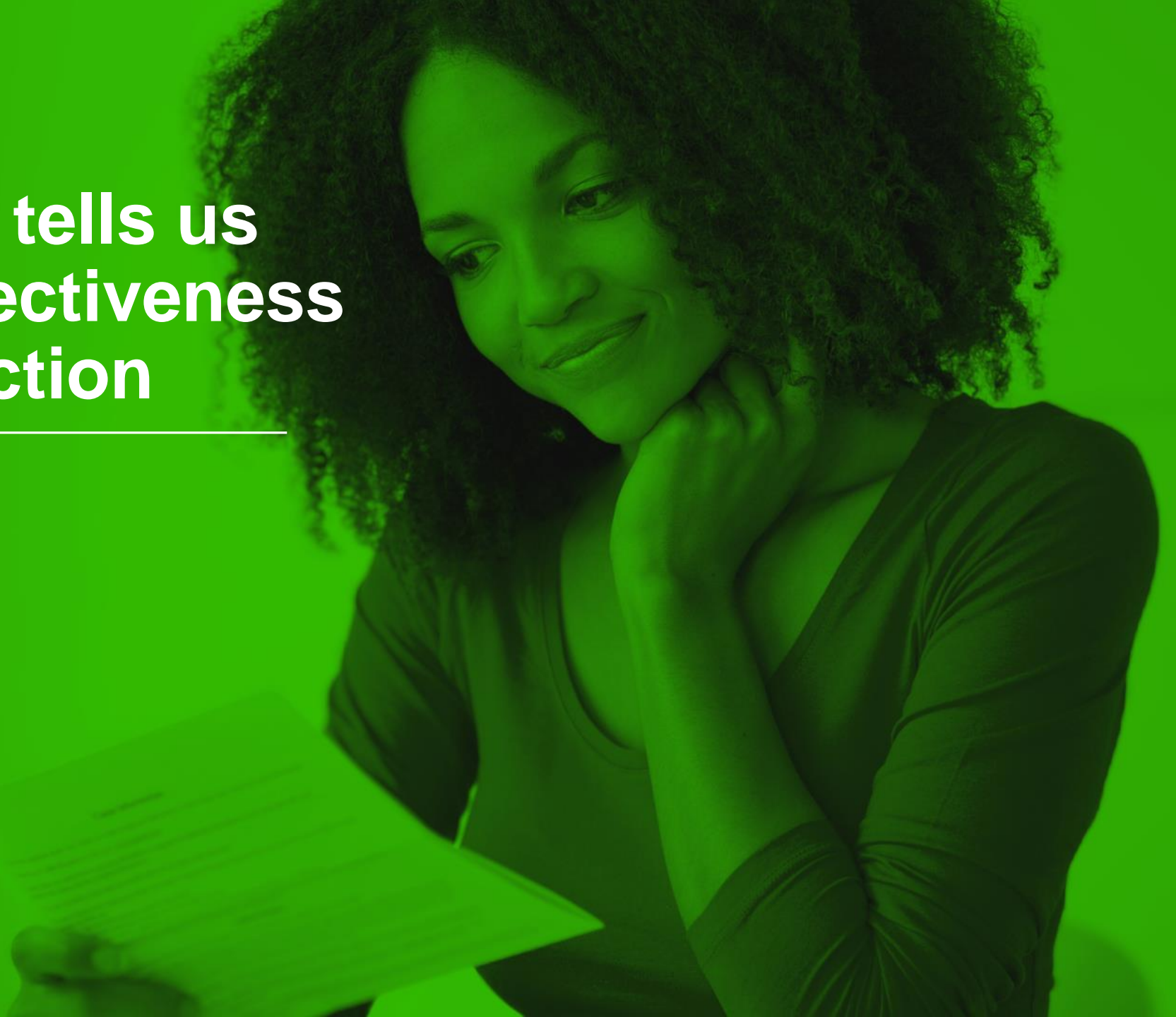
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What JICMAIL tells us about mail effectiveness during the election

November 2024

**JIC
MAIL**

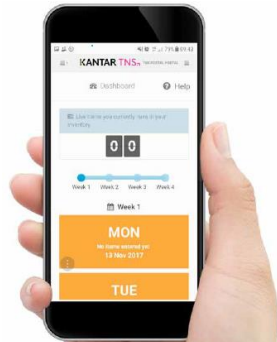
Mail Media Metrics



JICMAIL: gold standard mail measurement

1.

The JICMAIL Panel: 1,000 households, mail R&F and effectiveness



KANTAR

2.

Response Rate Tracker:
2,300 campaigns, response, ROI, AOV and CPA

13 Industry Organisations

3.

Custom Research:
e.g. attention research, campaign effectiveness studies

4.

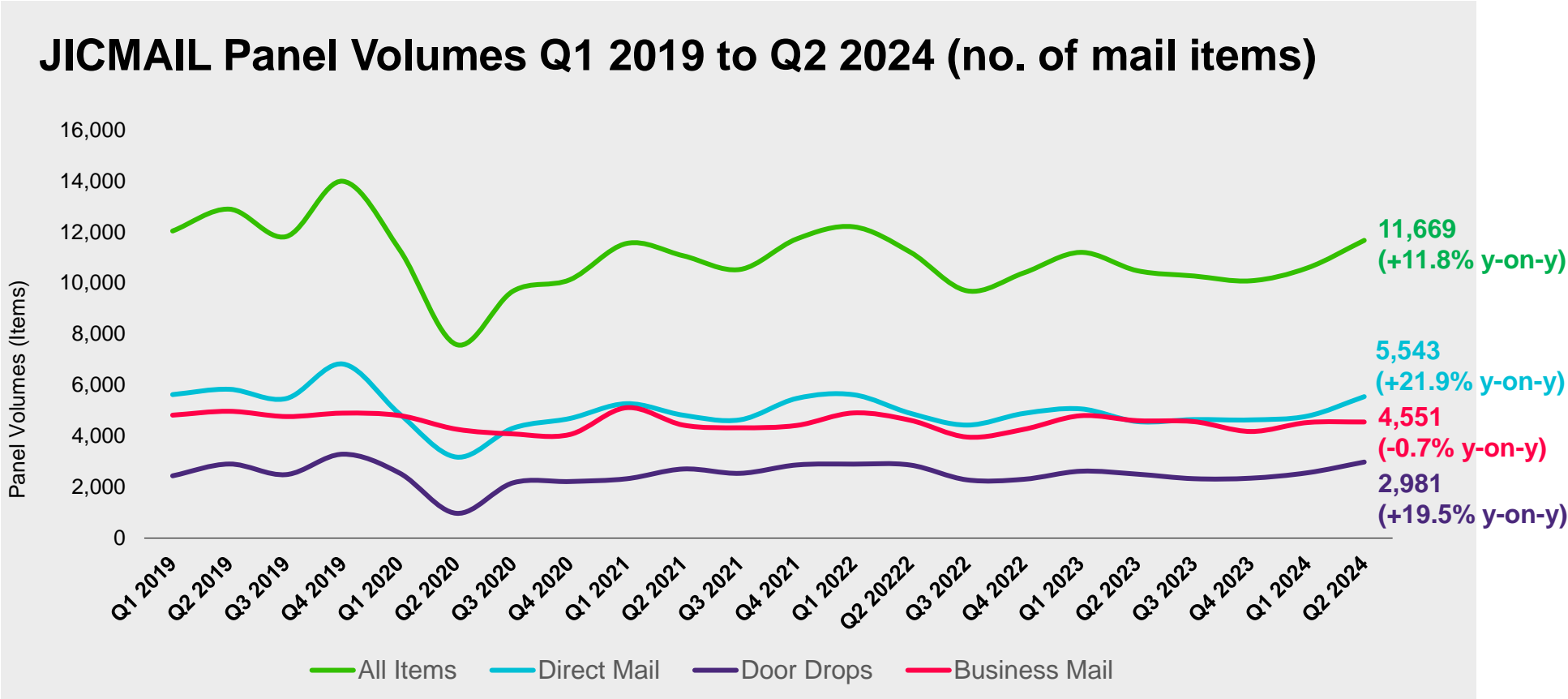
NEW:
Circulation Data

 Nielsen

**JIC
MAIL**

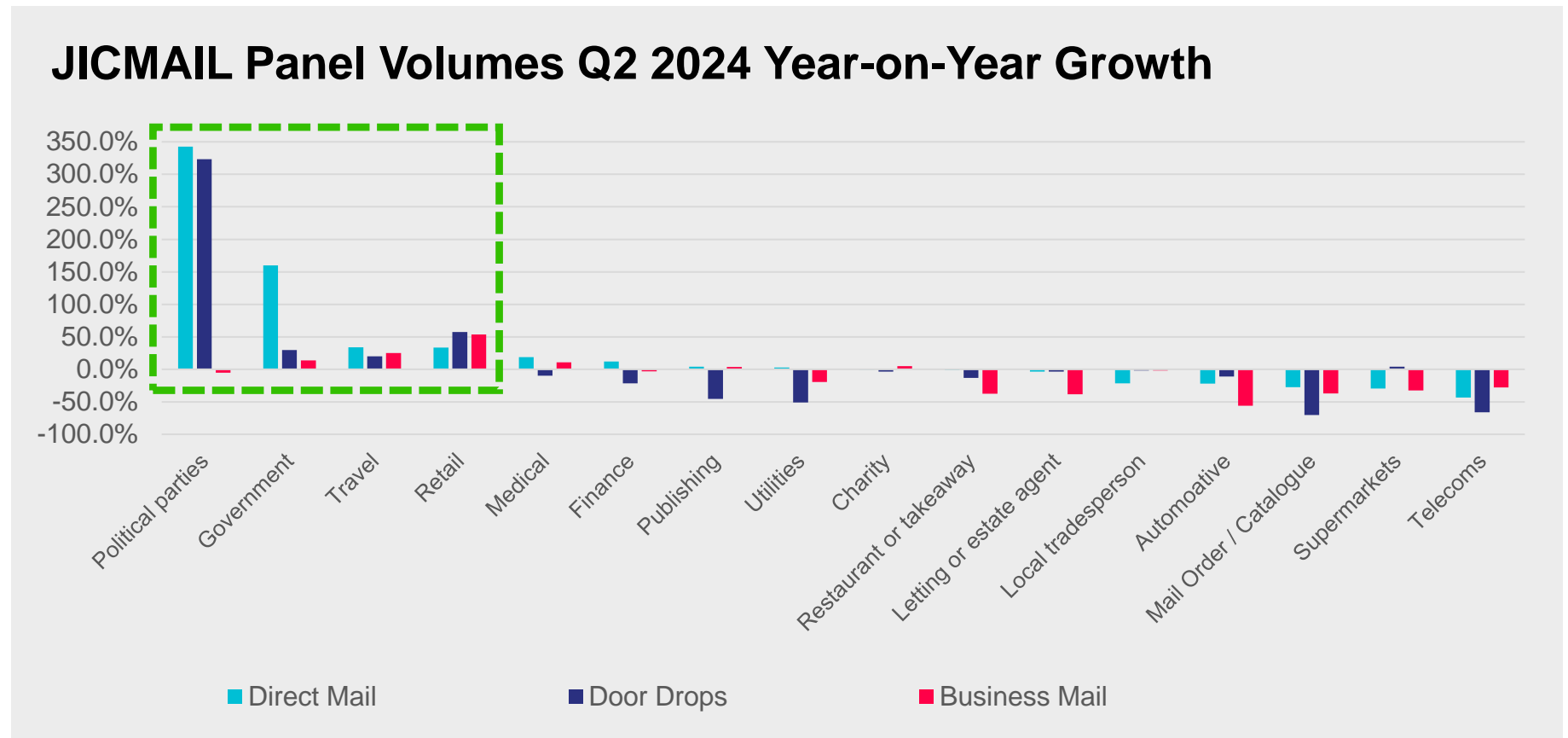
Mail Media Metrics

Panel volumes up 12% year-on-year in Q2 2024



Source: JICMAIL Item Data Q1 2019 to Q2 2024 n=242,092 mail items

Political mail volumes quadrupled year on year in the run up to the July General Election



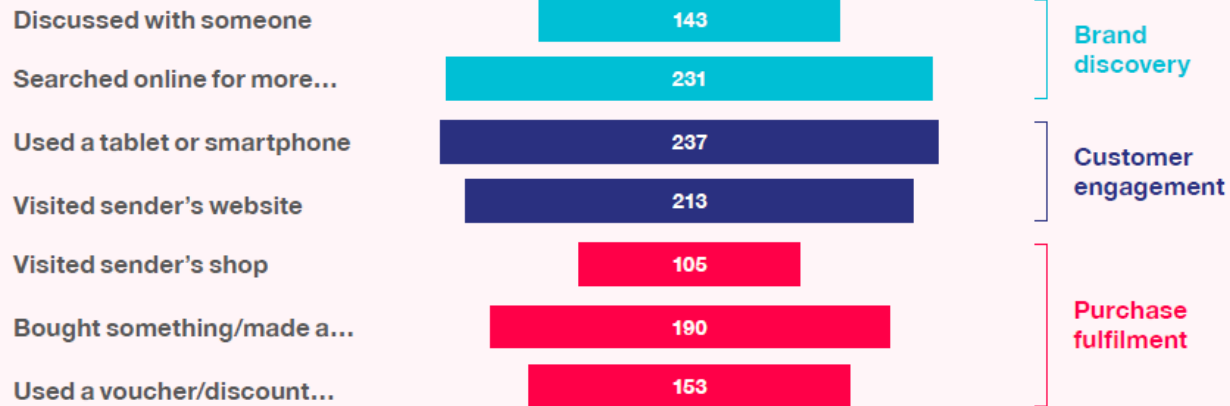
Direct Mail and Door Drops from political parties were kept in the home for around five days

Political Party Key Mail Metrics Q2 2024

	Direct Mail	Door Drops
Item Reach (people in household)	1.13	1.07
Frequency (no. of interactions)	3.56	3.11
Lifespan (days live in the home)	5.48	4.77
Attention (seconds interacted with)	65.63	58.72



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

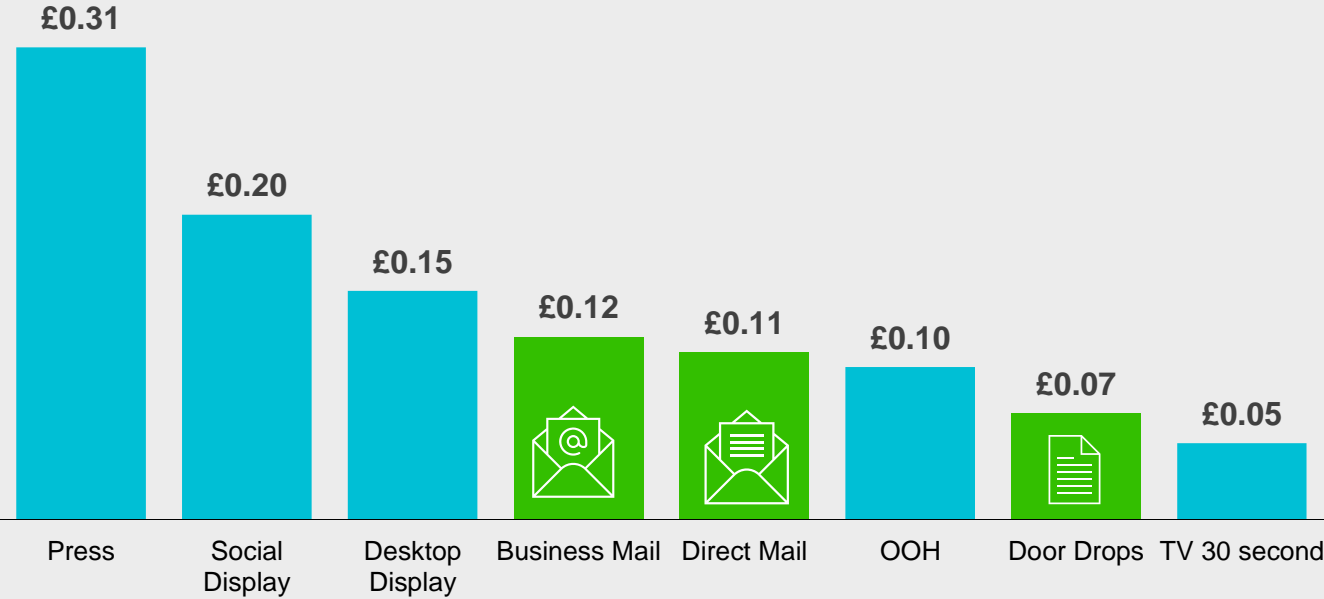


The Door Drop Attention Effectiveness Multiplier:

x3—x5

Mail is as attention efficient as any other channel

Cost per Minute of Attention as of Q1 2024 (ABC1 Adults)



Source: JICMAIL Item Data Q1 2024.; Lumen; TVision; 7Stars 2023 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. OOH data based on roadside only.

Political mail's primary strength is as a conversation catalyst

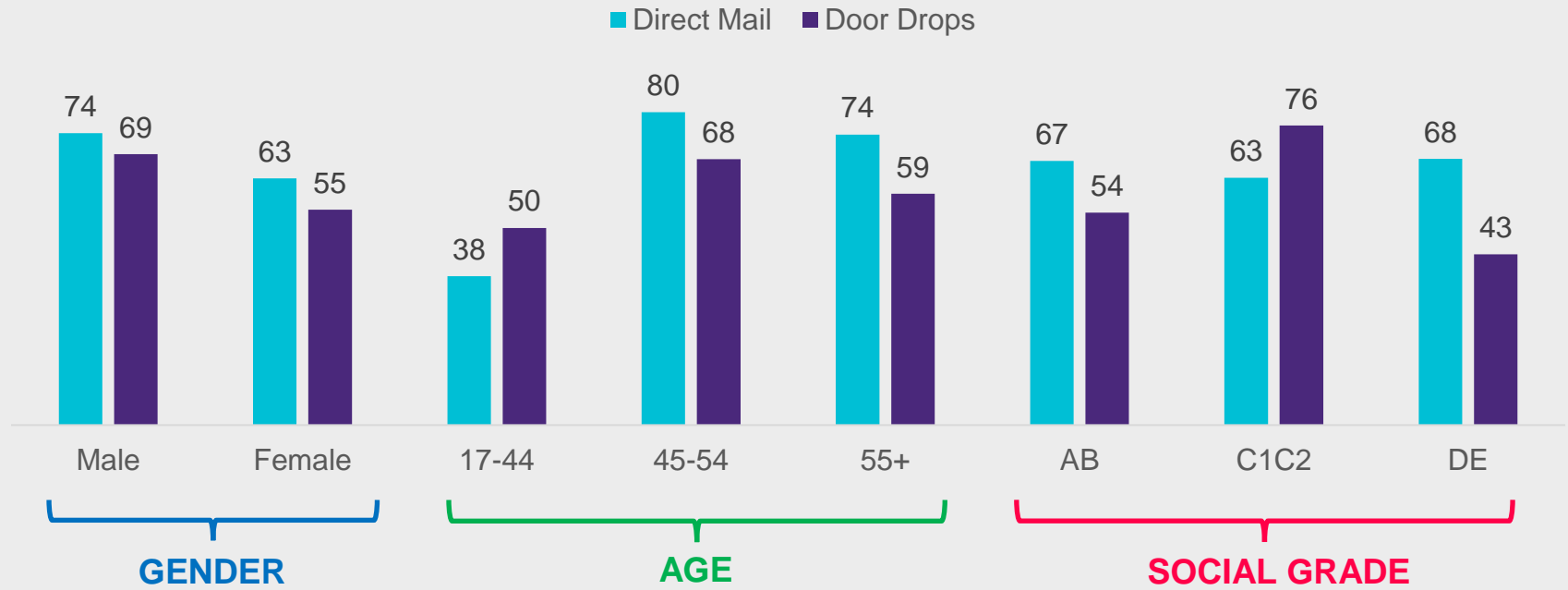
Political Party Key Commercial Actions Q2 2024 (% of mail items prompting action)

	Direct Mail	Door Drops
Discussions	14.6%	11.9%
Digital Response	1.8%	1.4%
Posted Reply	2.9%	-



Who paid the most attention to political party mail?

Political Party Mail Attention by Key Demographic (seconds interacted with across 28 days)



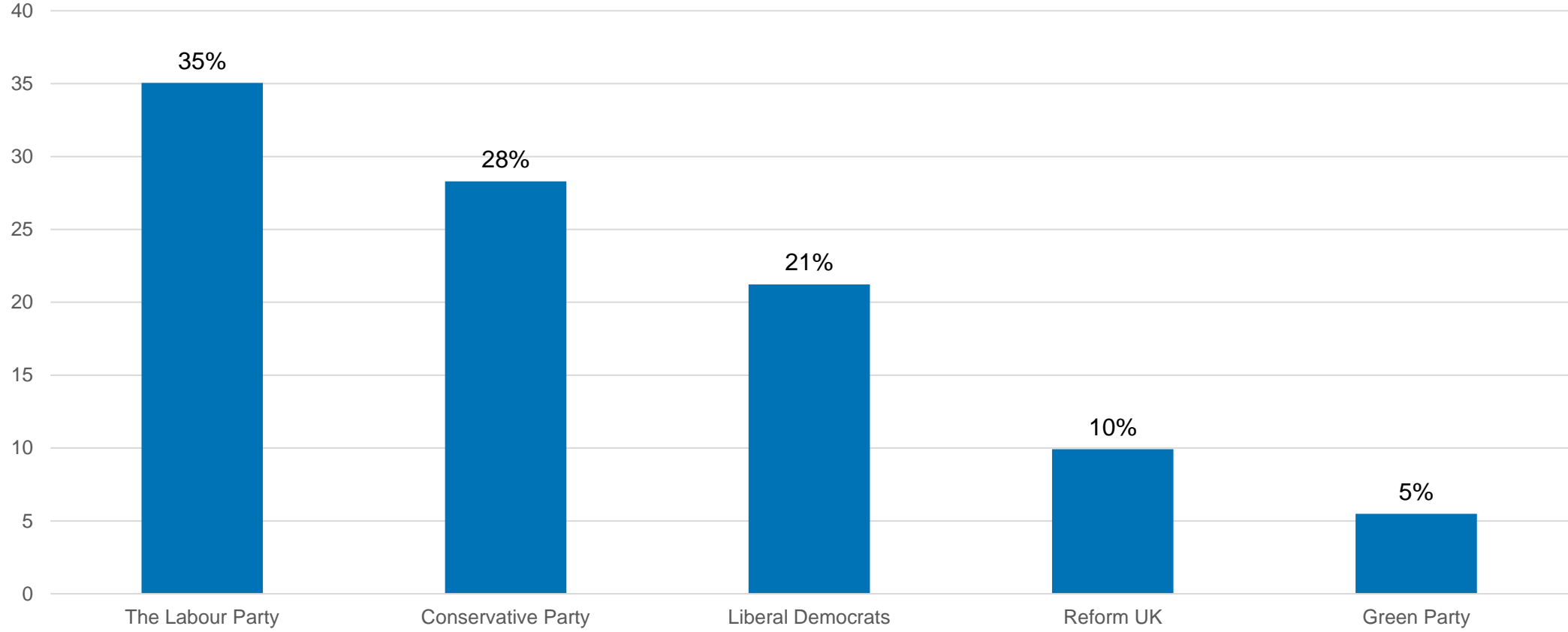
How did mail from the key political parties perform?



Mail Media Metrics

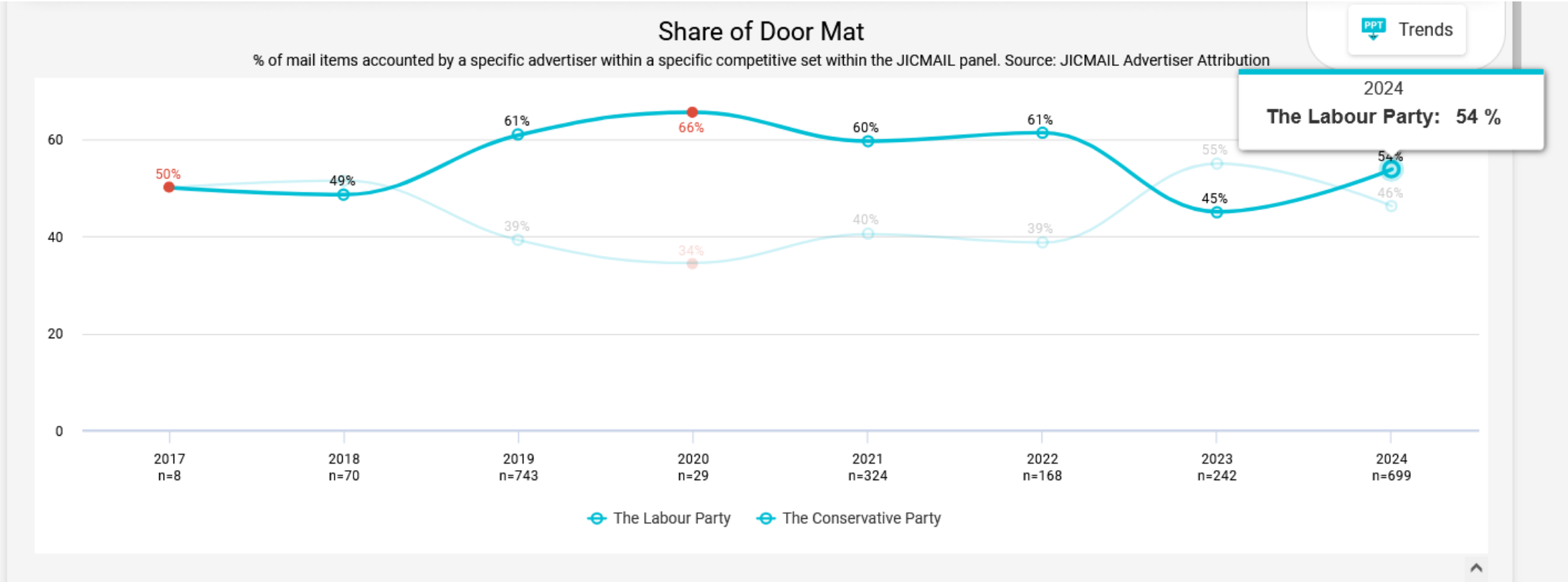
Labour took control of the doormat

% Share of Panel Volumes



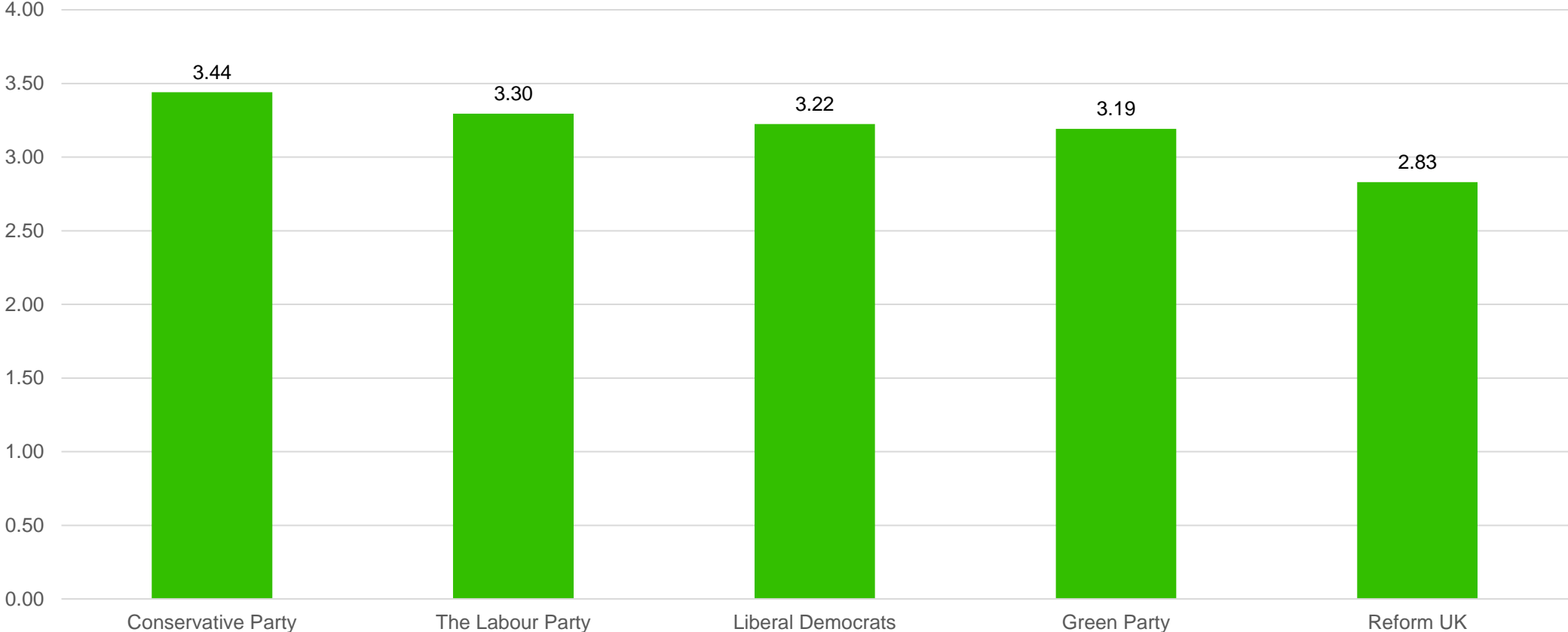
The Labour Party	Conservative Party	Liberal Democrats	Reform UK	Green Party
332	268	201	94	52

Recovering from share loss in 2023



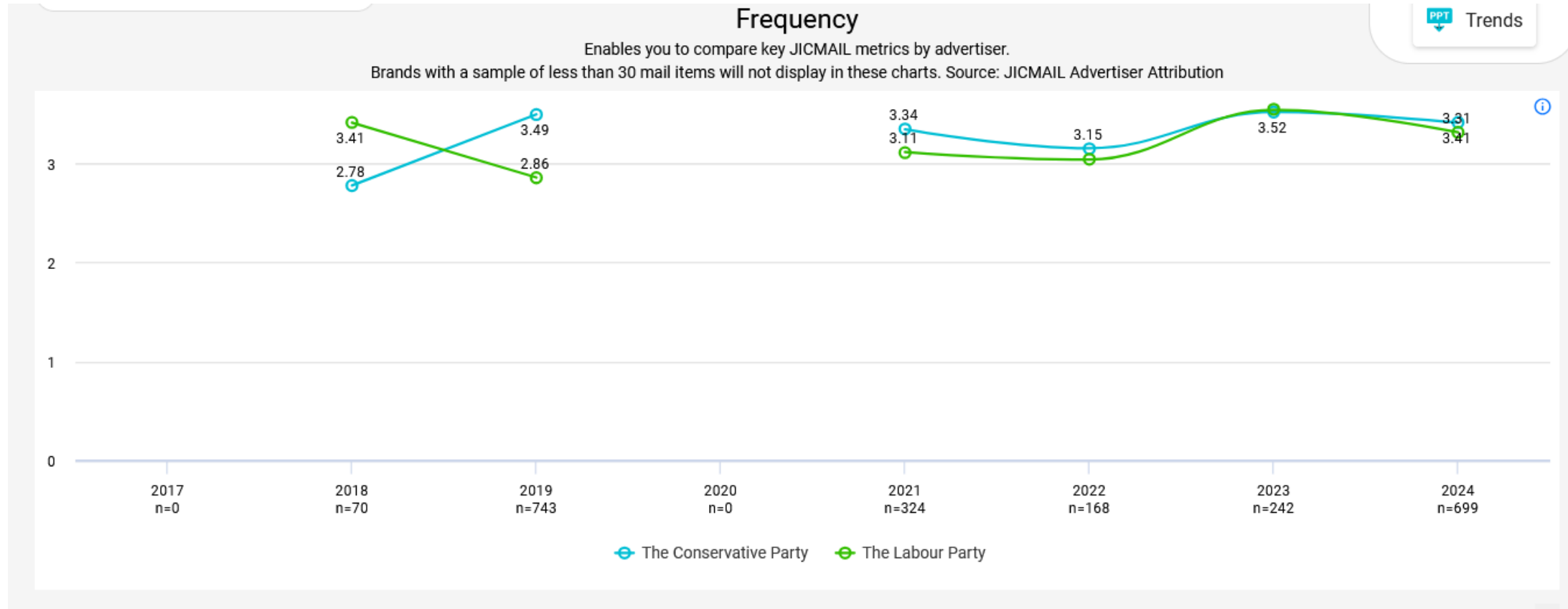
Mail from the Conservatives interacted with slightly more

Frequency of mail interaction



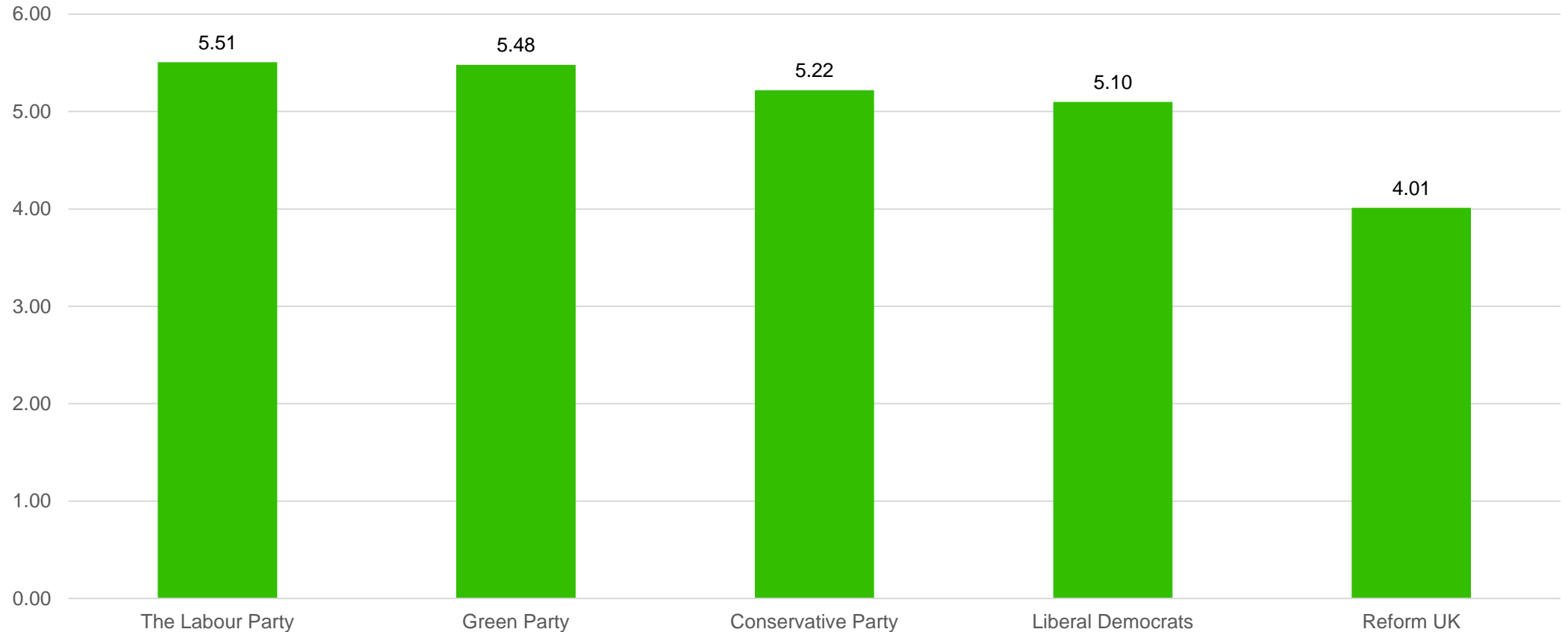
Conservative Party	The Labour Party	Liberal Democrats	Green Party	Reform UK
268	332	201	52	94

Generally mail interaction rates tend to be close



Mail from Labour stayed in the home marginally longer

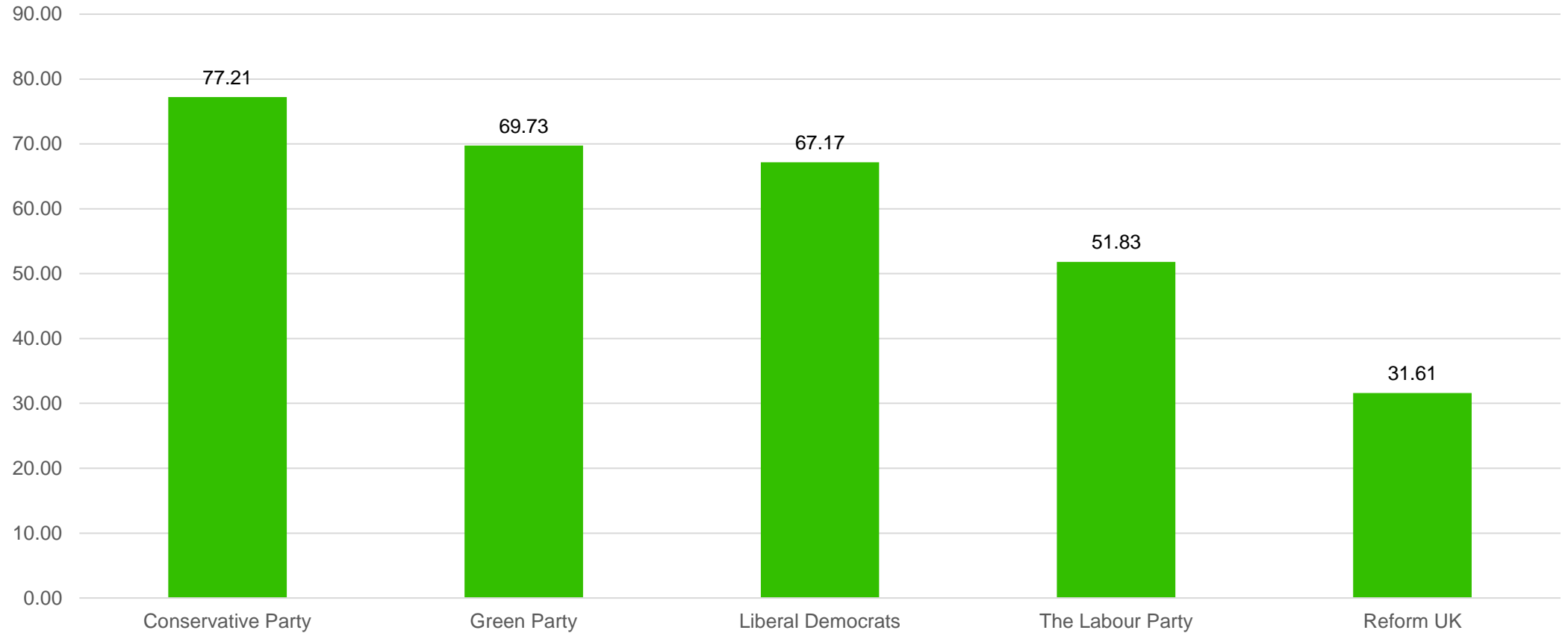
Day live in the home



The Labour Party	Green Party	Conservative Party	Liberal Democrats	Reform UK
332	52	268	201	94

Conservative mail looked at for longer

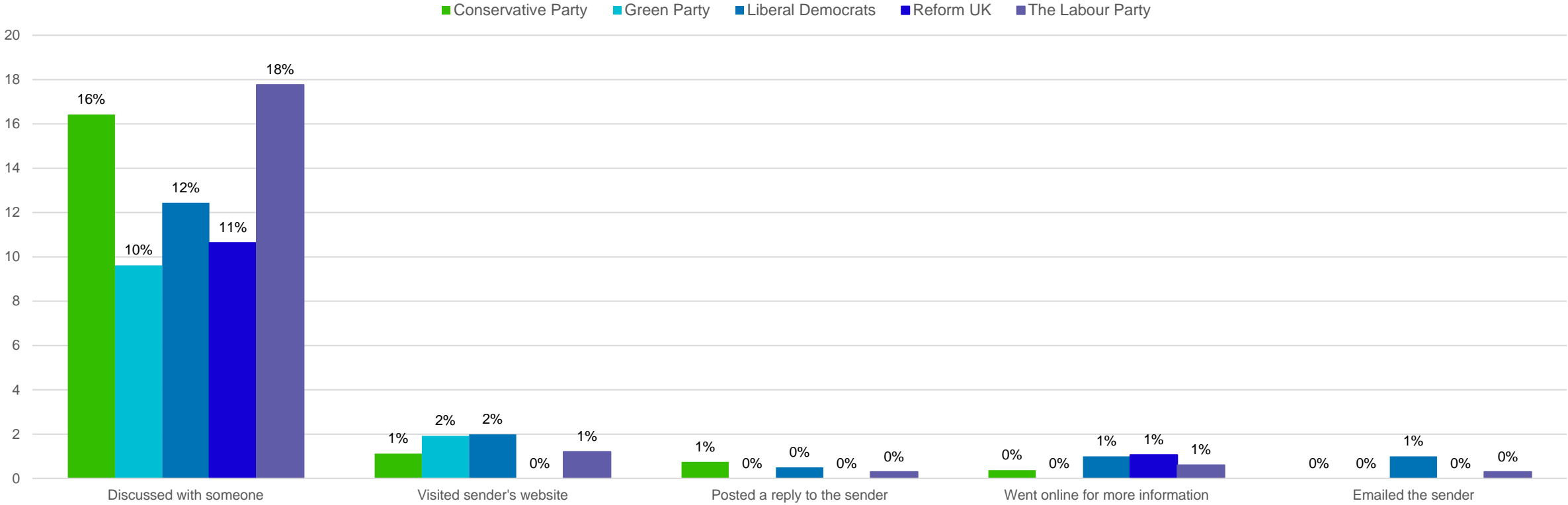
Number of second mail interacted with across 28 days



Conservative Party	Green Party	Liberal Democrats	The Labour Party	Reform UK
268	52	201	332	94

But crucially Labour generated more conversation

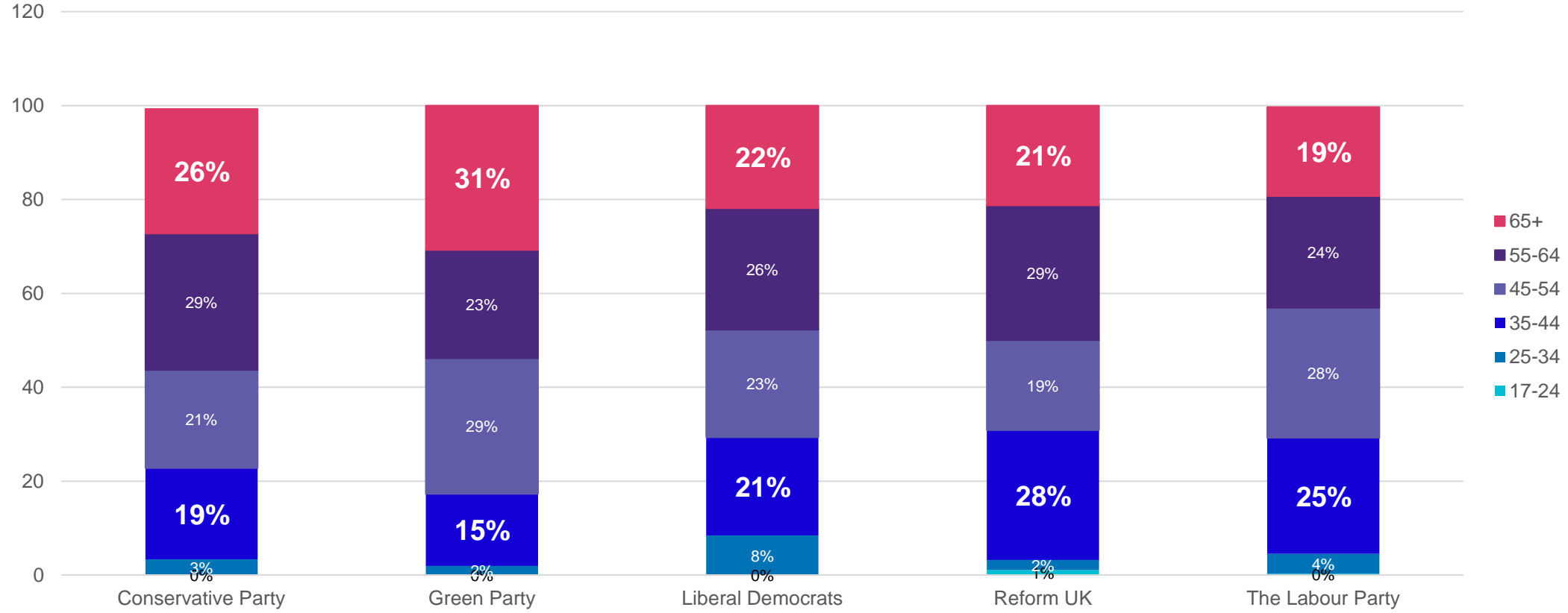
% of mail items prompting action



Discussed with someone	Visited sender's website	Posted a reply to the sender	Went online for more information	Emailed the sender	Bought something/made a payment or donation (NET)	Called the sender	Made a purchase/payment/donation by other means (e.g. postal, phone)
143	12	4	6	3	1	1	1

Labour reached a younger audience

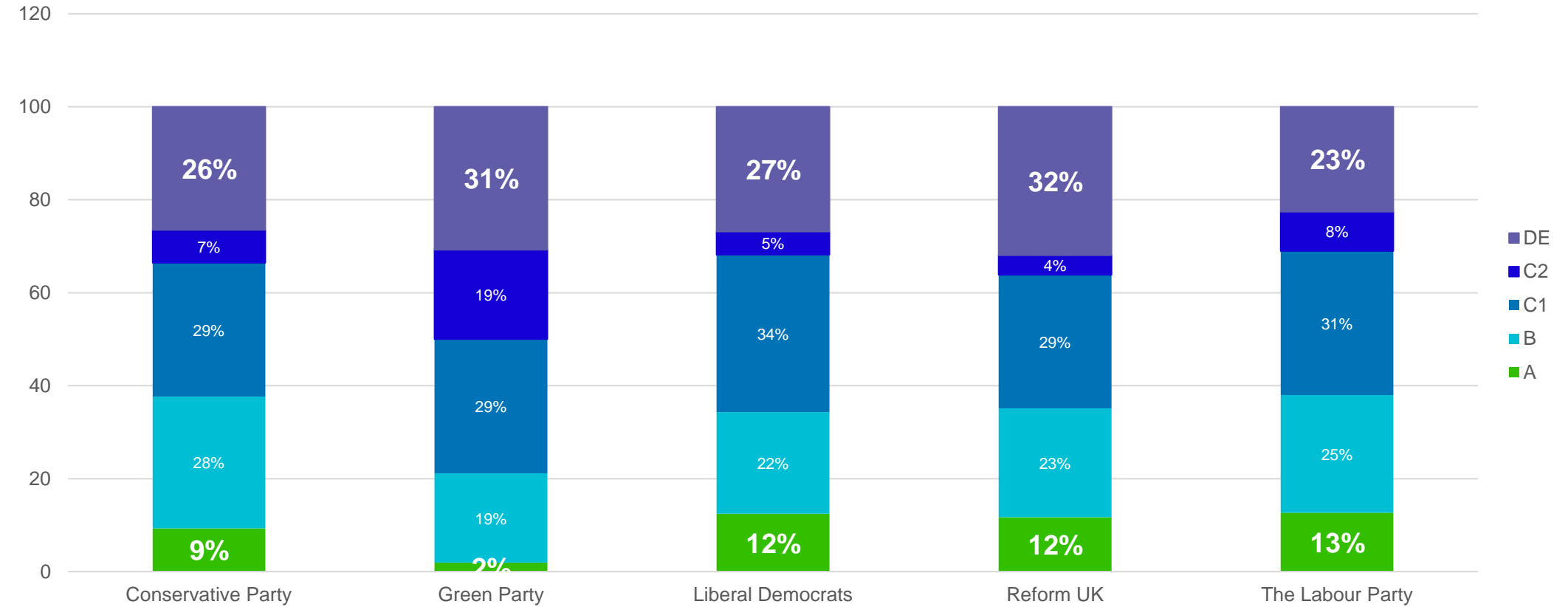
Age categories % audience profile



Conservative Party	Green Party	Liberal Democrats	Reform UK	The Labour Party
268	52	201	94	332

And a slightly more upmarket audience

Social Grade % audience profile



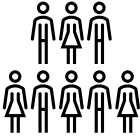
Conservative Party	Green Party	Liberal Democrats	Reform UK	The Labour Party
268	52	201	94	332

Election Mail Highlights in Q2 2024



+12%

Increase in JICMAIL panel volumes year-on-year



10%

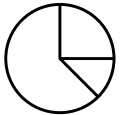
Of volume driven by political parties: more than quadrupling their mail activity year on year



80

seconds

Spent with the average piece of political DM among 45-54 year olds



5%

Share of doormat for Labour in Q2



18%

Of Labour's mail prompted a conversation



76

seconds

Spent with the average political Door Drop among the C1C2 social grade

Thanks

 jicmail.org.uk

 [linkedin.com/company/jicmail](https://www.linkedin.com/company/jicmail)

 ian@jicmail.org.uk

 [@jicmailuk](https://twitter.com/jicmailuk)

**JIC
MAIL**

Mail Media Metrics

/ Q&A

Amanda Griffiths, Head of Customer Communication Planning and Insight, Marketreach

Ian Gibbs, Director of Data Leadership and Learning, JICMAIL

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/ Closing Comments

Mark Cross, Engagement Director, JICMAIL

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/ Feedback Link

