

JICMAIL Q2 2022

Key Results

August 2022

**JIC
MAIL**

Mail Media Metrics



1. Increased mail importance

Discard rates down; filing rates up; mail taken out of the home up

2. Cross-sector volume growth

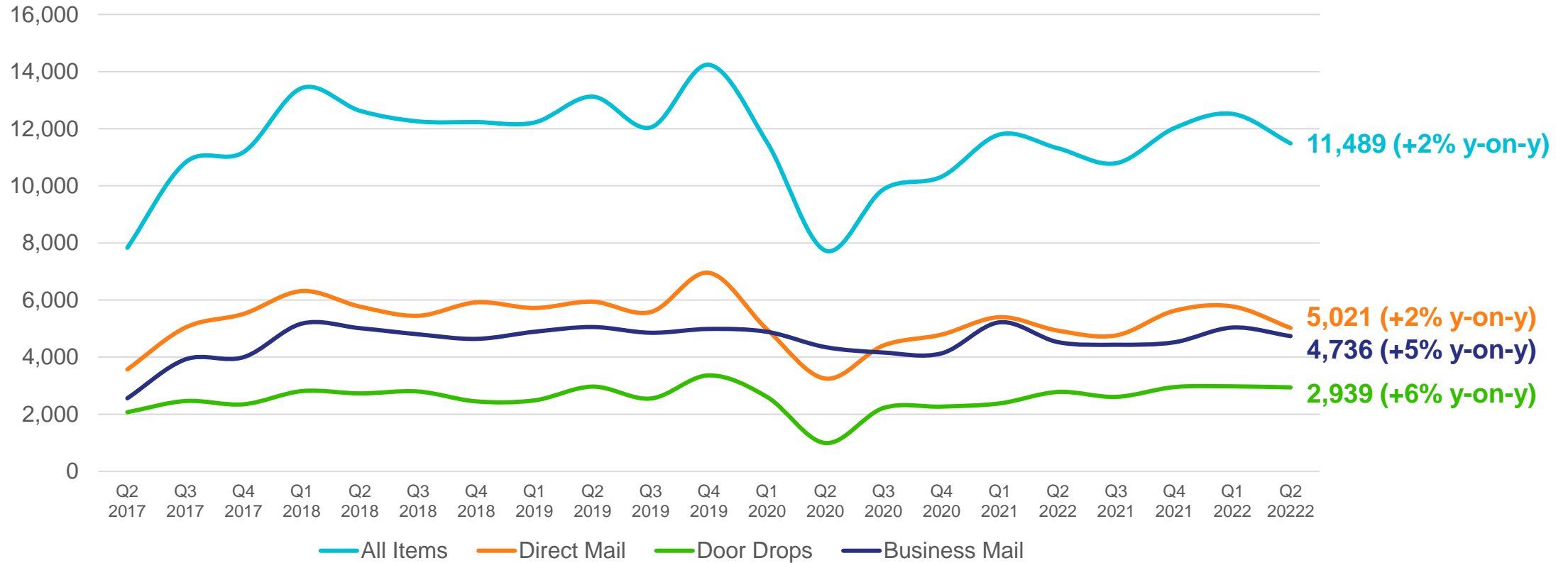
Travel, Supermarket, Utilities and Charities are the biggest volume growth drivers

3. Stable and reliable mail planning metrics

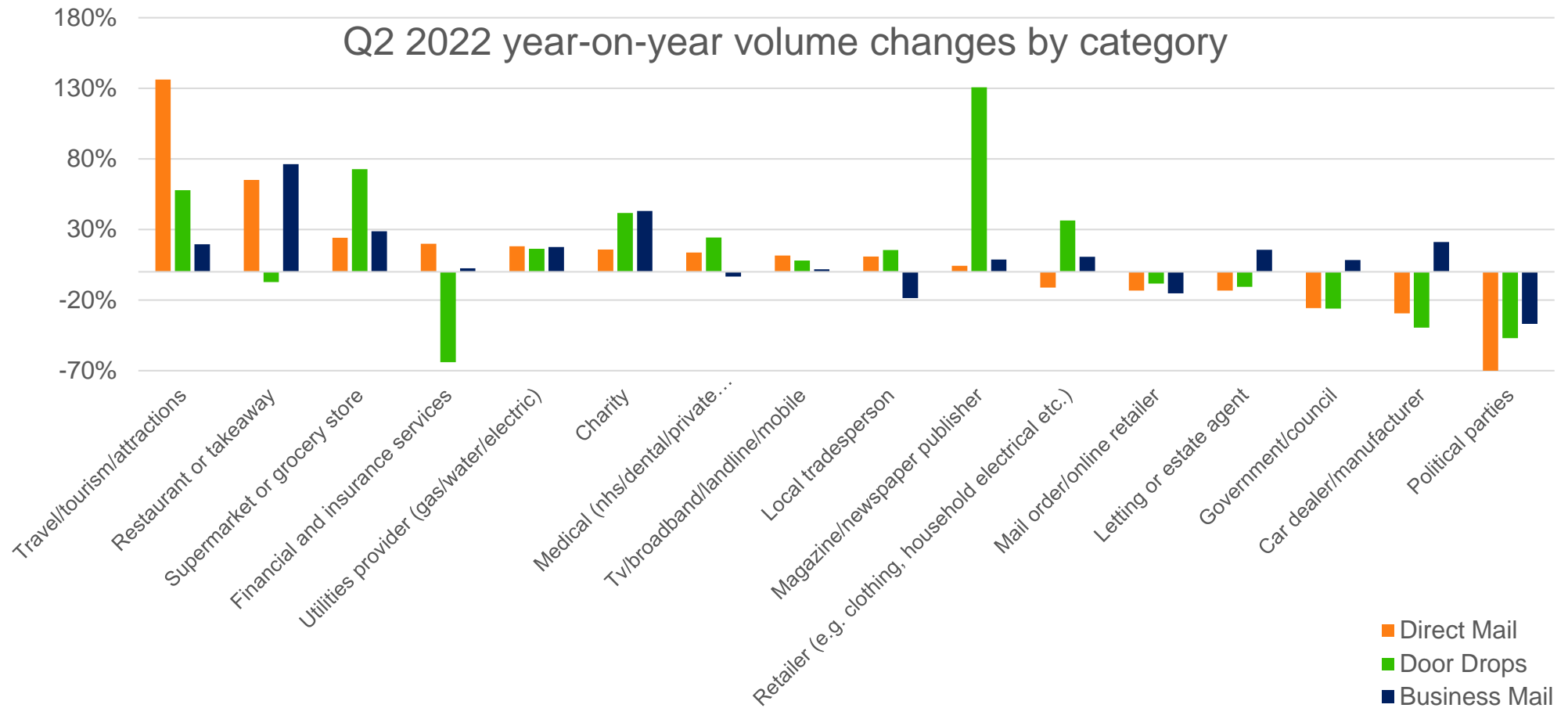
Mail reach frequency and lifespan all stable year on year

Modest year-on-year growth in panel volumes in Q2 2022

JICMAIL Volumes Q2 2017 to Q2 2022

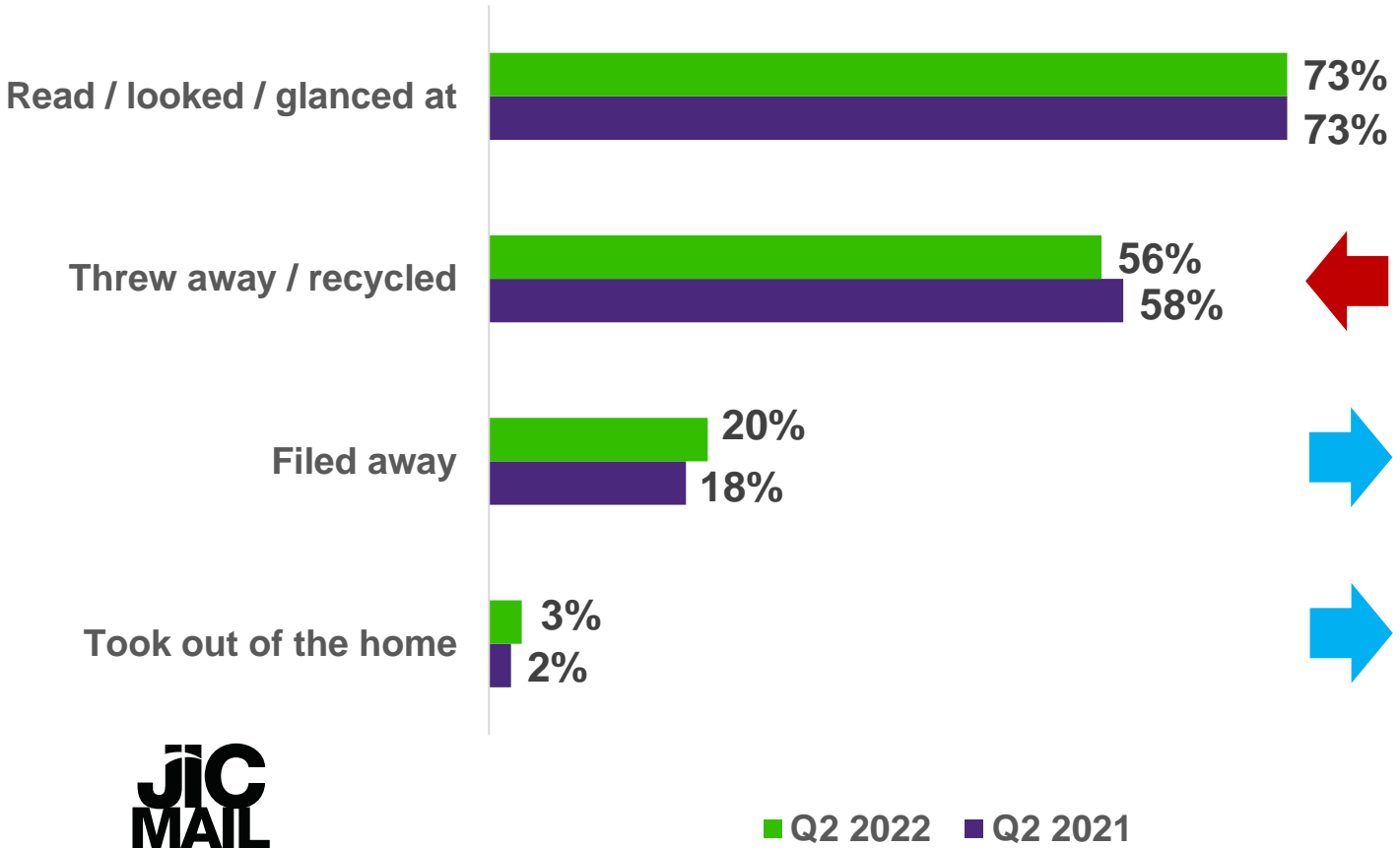


Travel, Supermarket, Utilities and Charities are the biggest growth drivers 4



Significant increase in the importance of mail in people's lives in Q2. It's less likely to be discarded and more likely to be filed away or taken out of the home

Physical Actions (All Mail Types) % of mail items

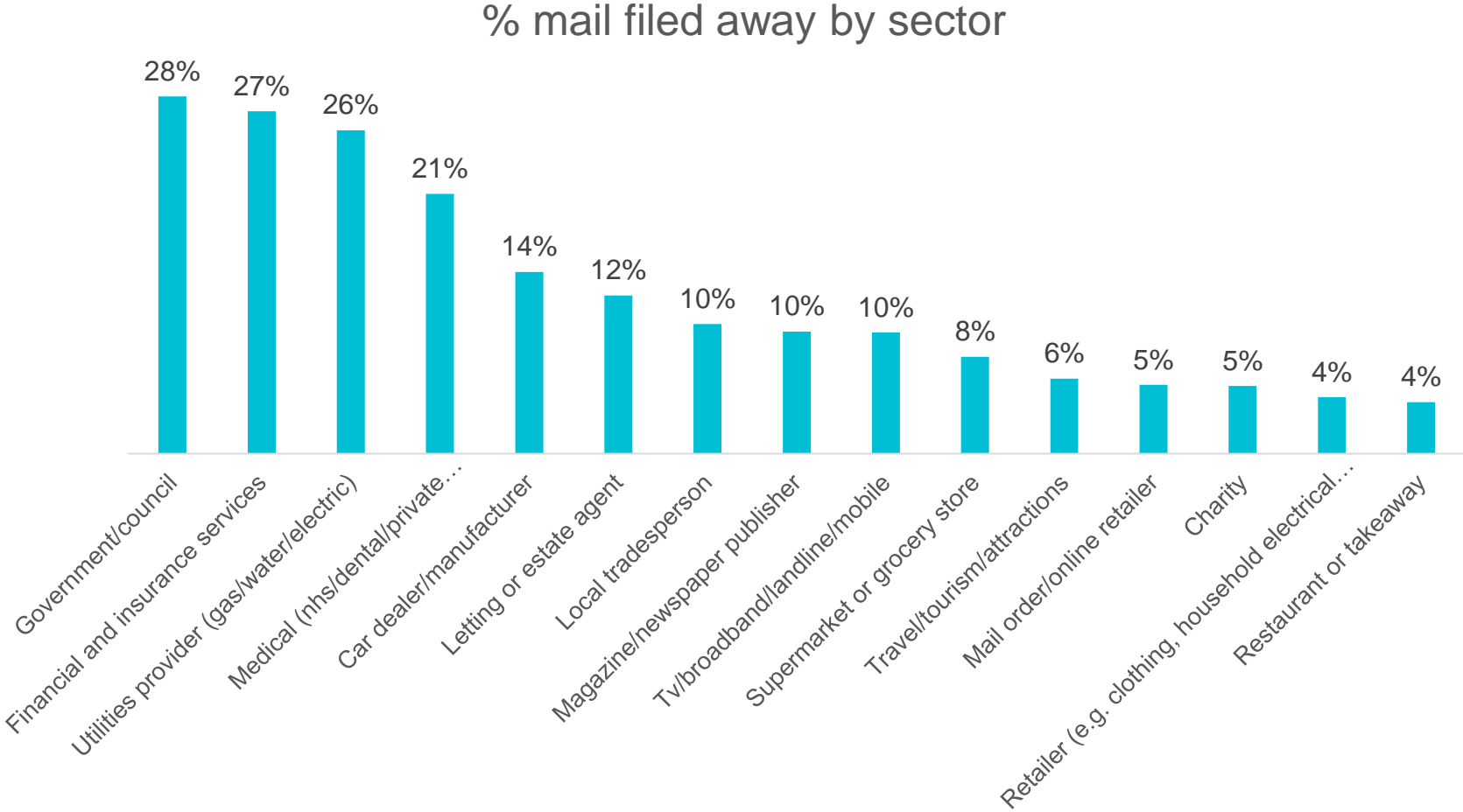


- 1. Active engagement with mail is high.
- 2. There has been a statistically significant decline in the amount of mail being discarded in Q2 2022.
- 3. Instead of discarding their mail, people are filing it away for later reference or taking it out of the home.



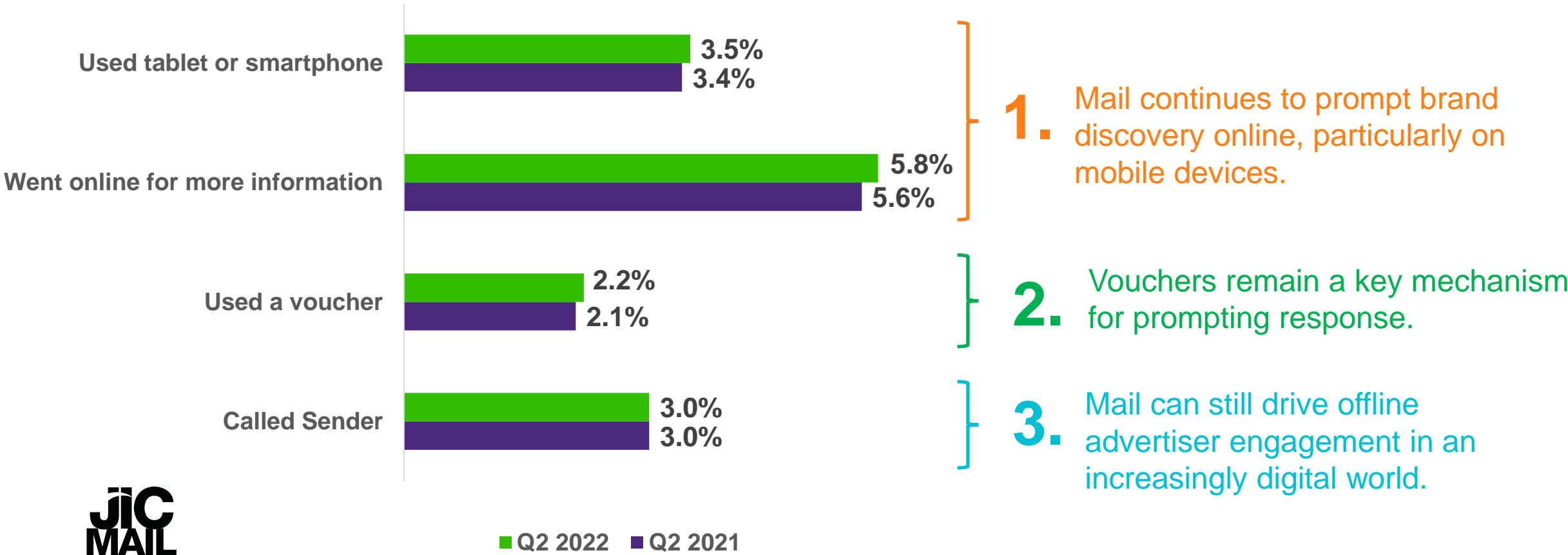
Source: JICMAIL Item Data Q2 2022 n=11,489 mail items

Government, finance and utilities mail is the most likely to be retained by households

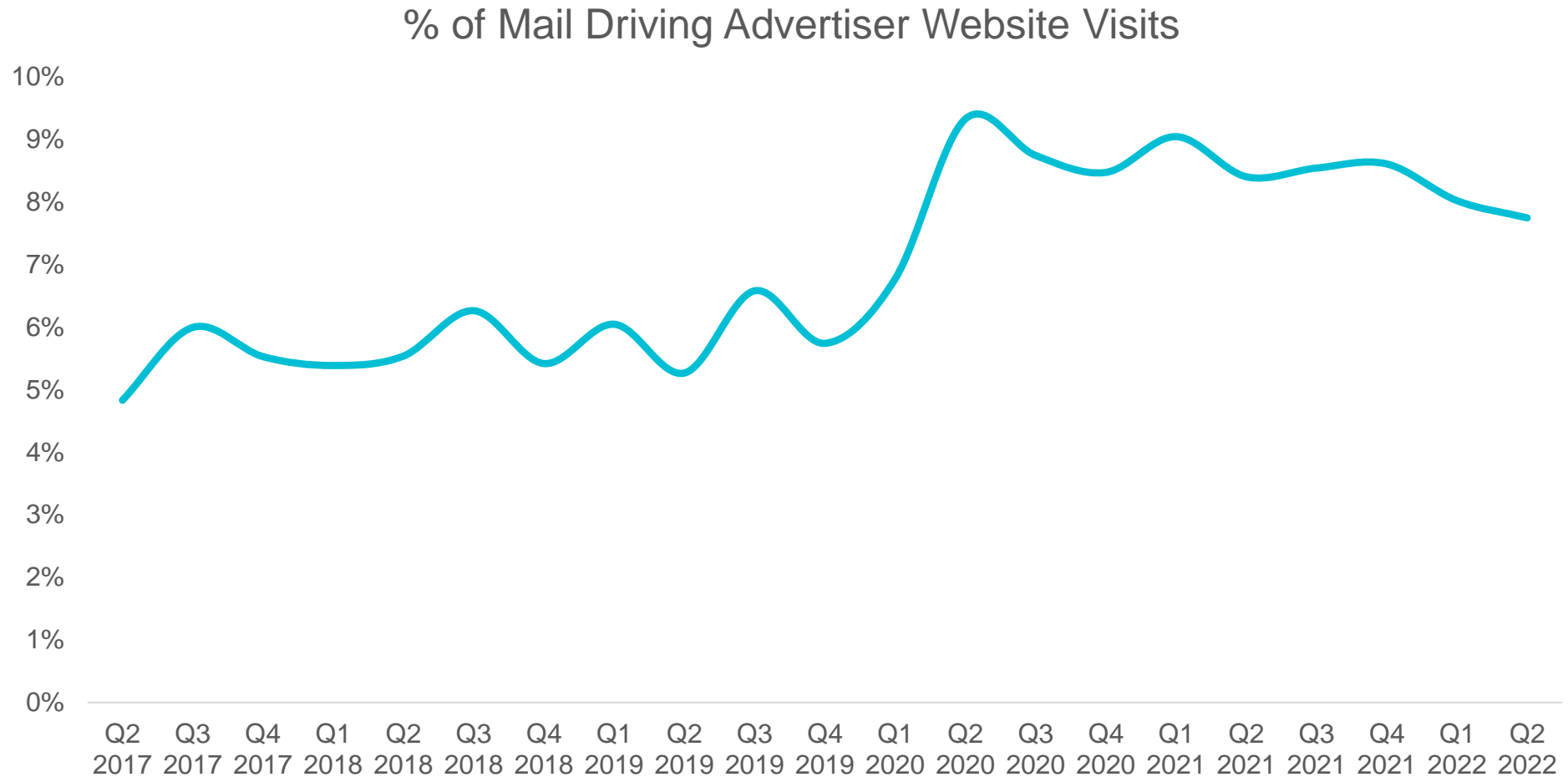


Incremental improvements in the digital effects of mail, along with voucher redemption

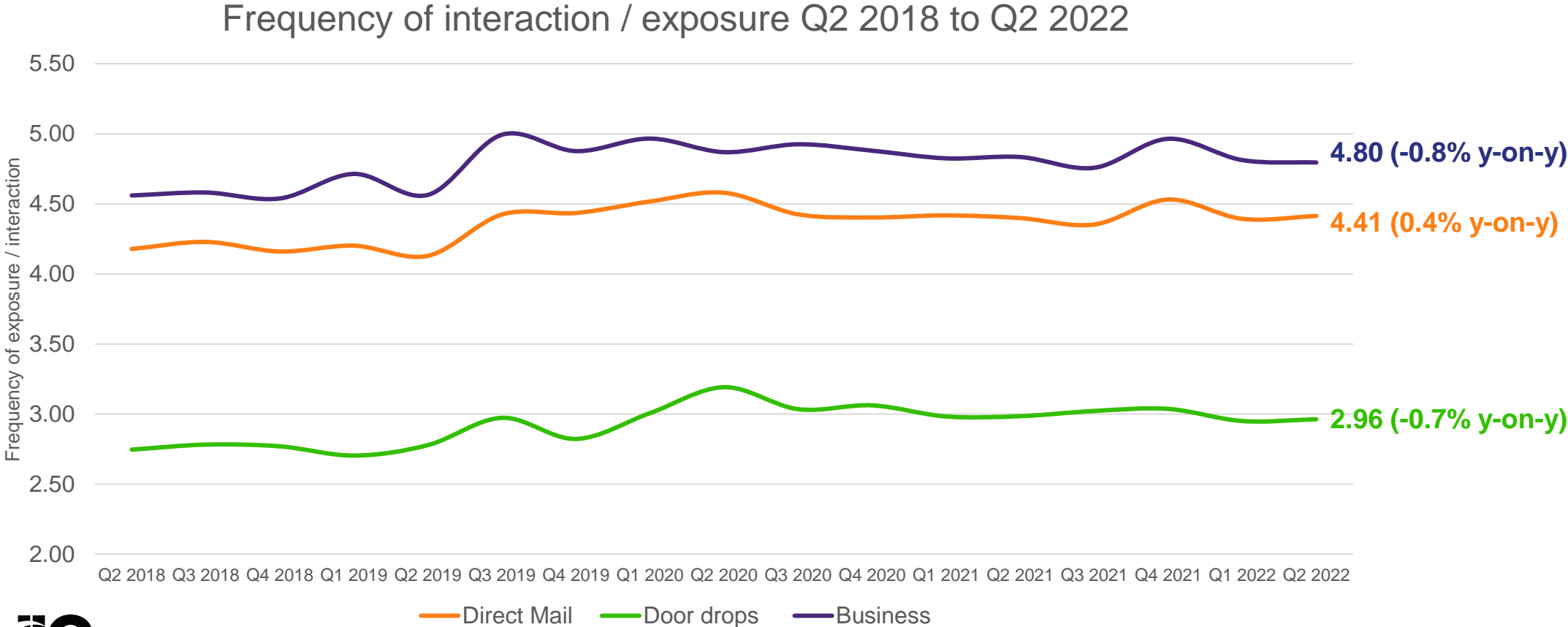
Commercial Actions (All Mail Types) % of mail items



Key five year trend: mail's ability to drive website traffic has increased by 60% between Q2 2017 and Q2 2022

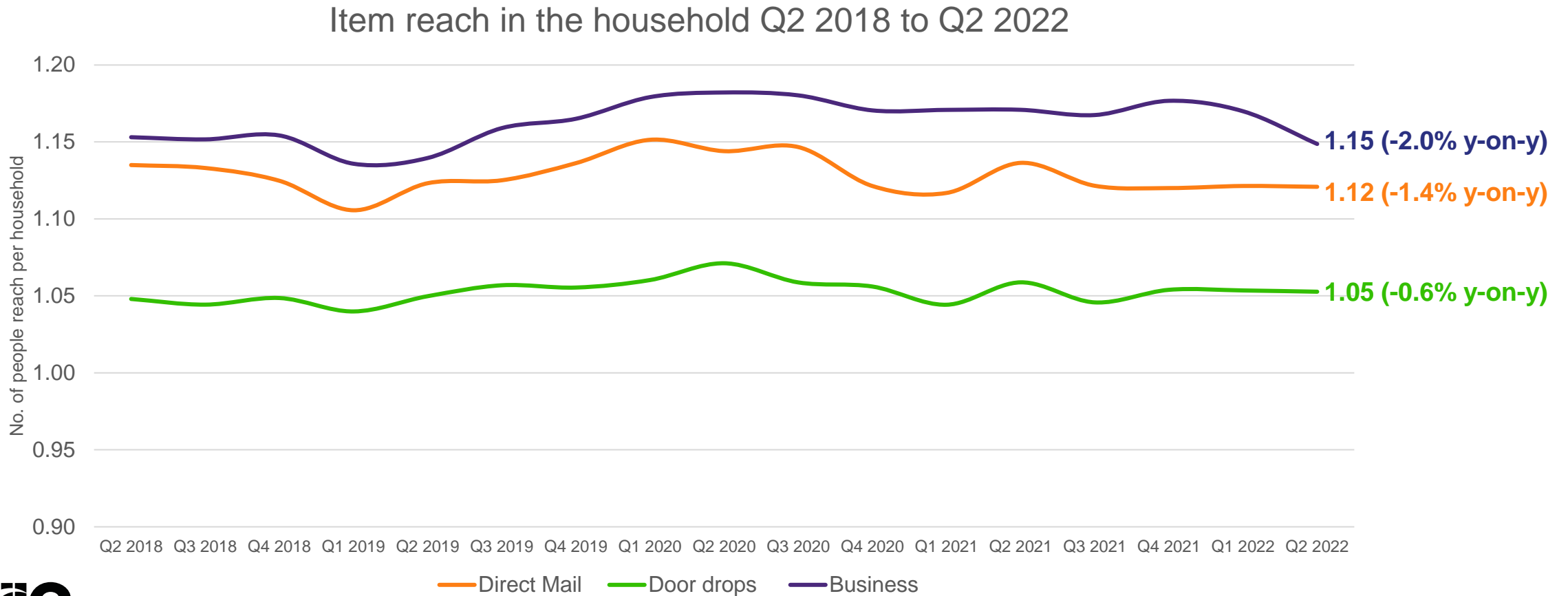


Frequency of interaction / exposure again very stable year-on-year

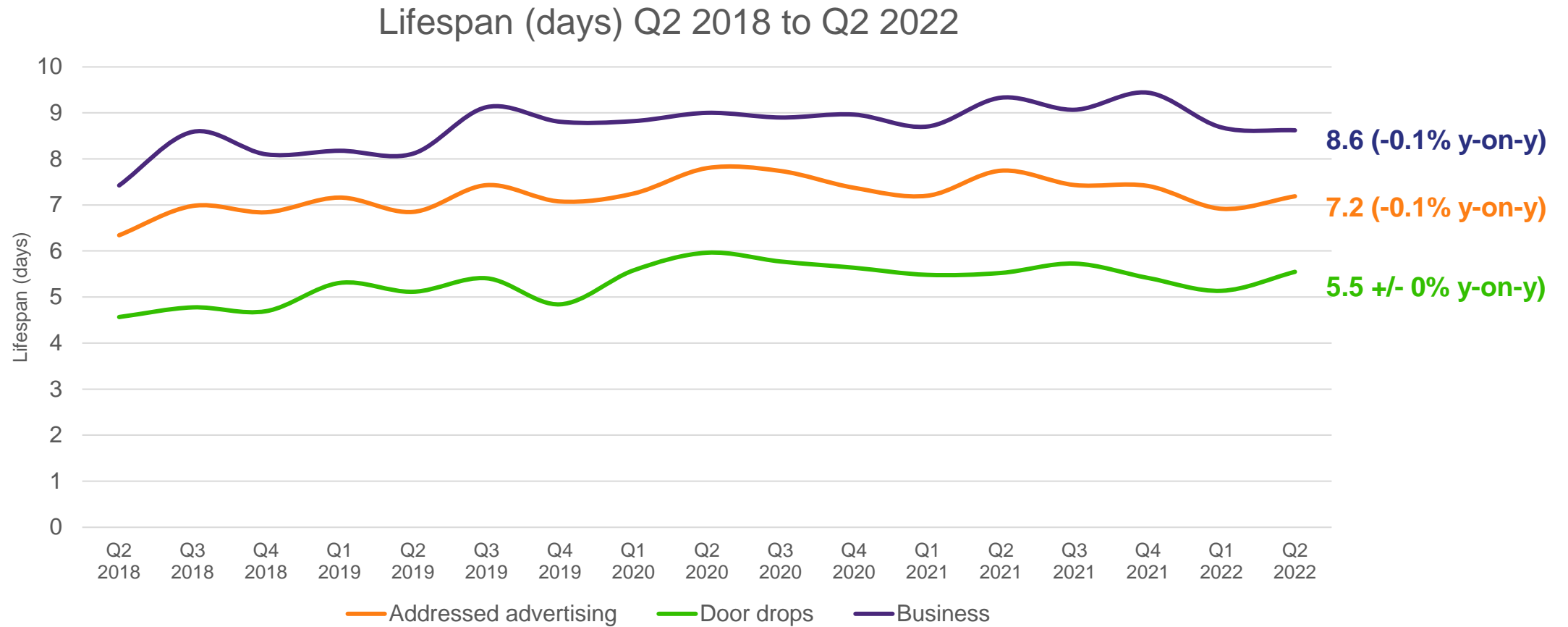


Source: JICMAIL Item Data Q2 2017 to Q2 2022 n=241,441 mail items

Mail sharing and therefore overall audience reach also very stable

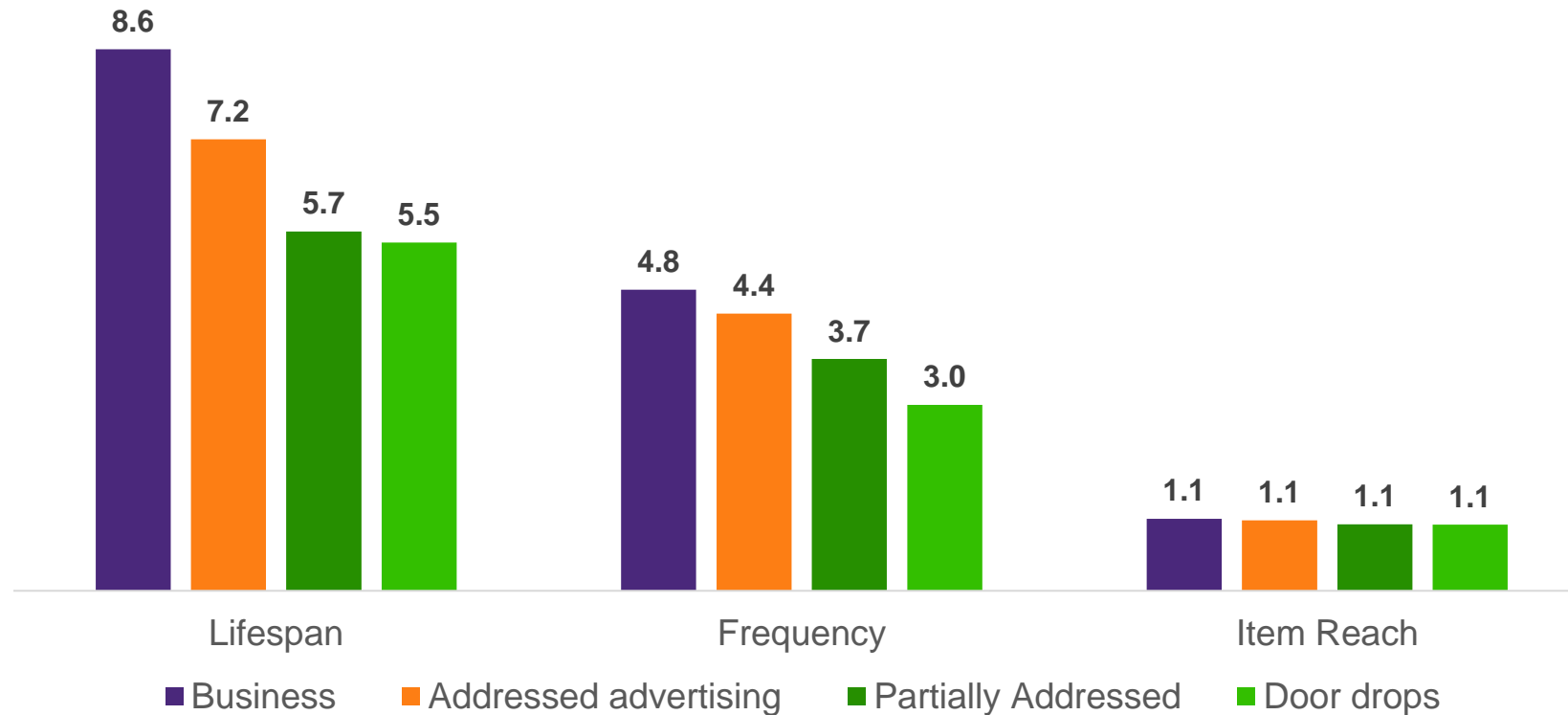


Lifespan metrics remain in the five to eight day range depending on mail type



Business mail stays in the home the longest, while mail sharing is fairly consistent across the four key mail types (i.e. +10% reach per household)

Mail media metrics across key mail types
Q2 2021 to Q2 2022



Advertiser activity

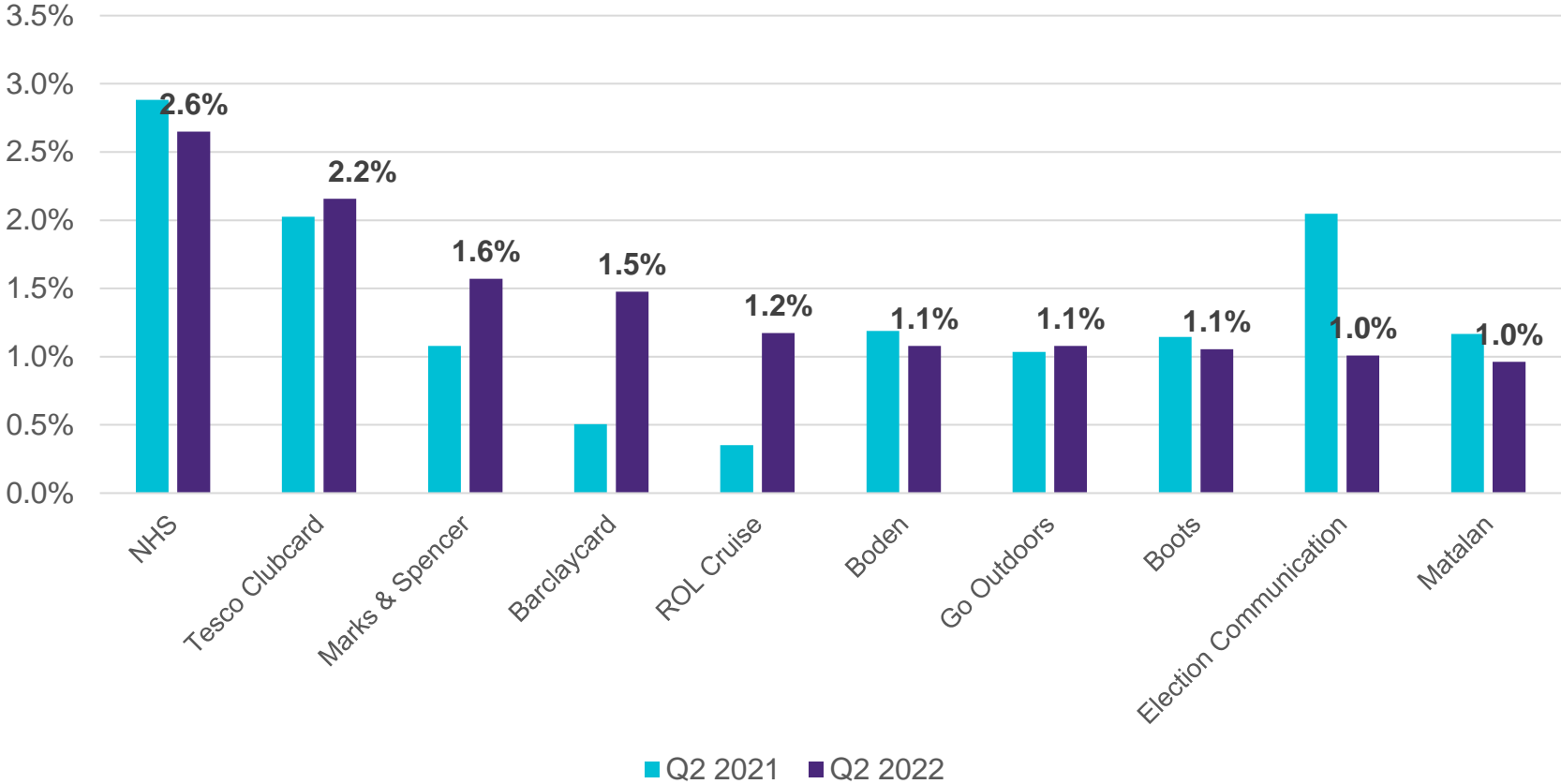
Q2 2022 Share of Door Mat



Mail Media Metrics

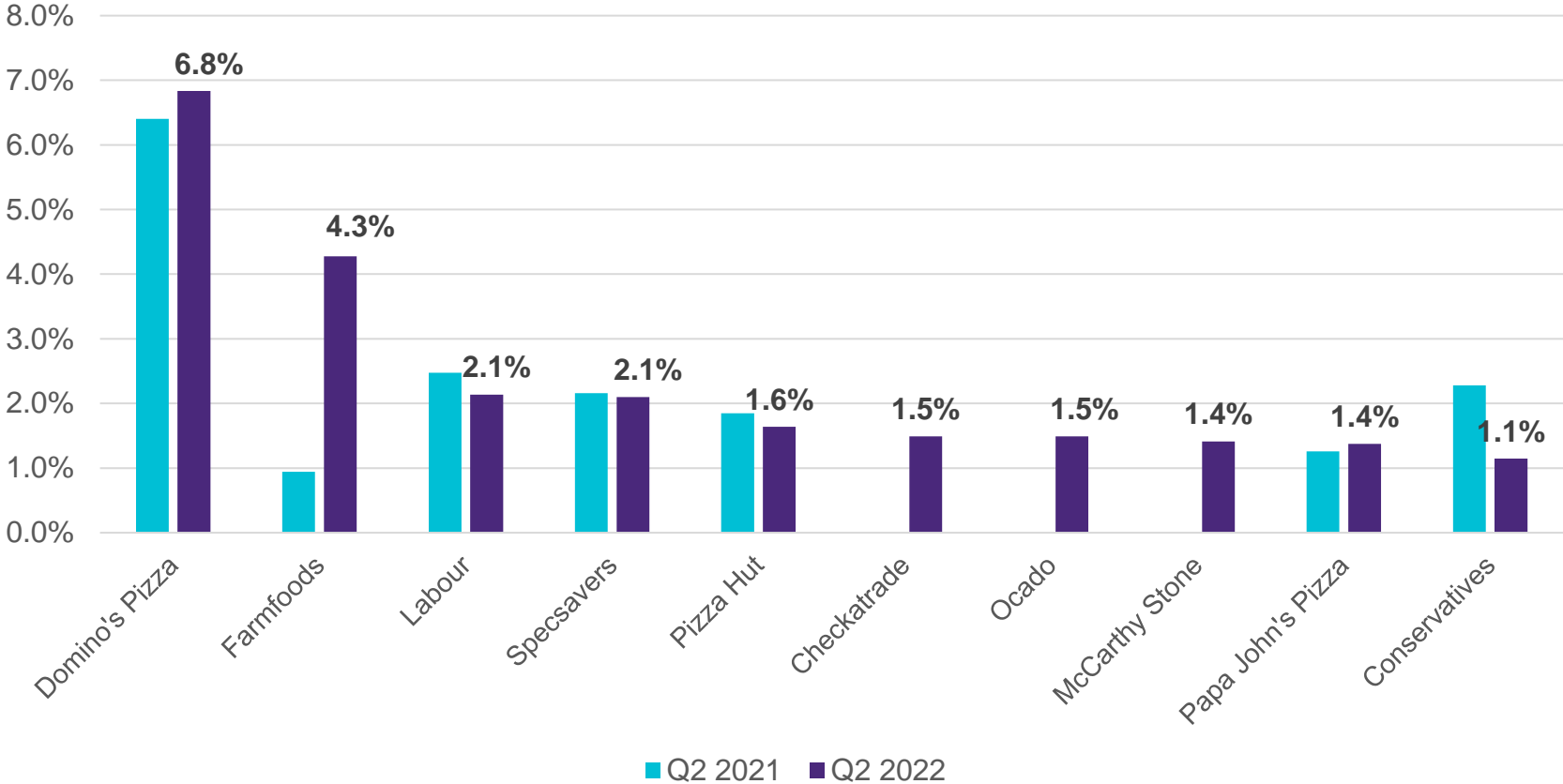
M&S, Barclaycard and ROL Cruises record the biggest DM share gains in Q2

Share of Door Mat (% of DM items)
Q2 2022 vs Q2 2021



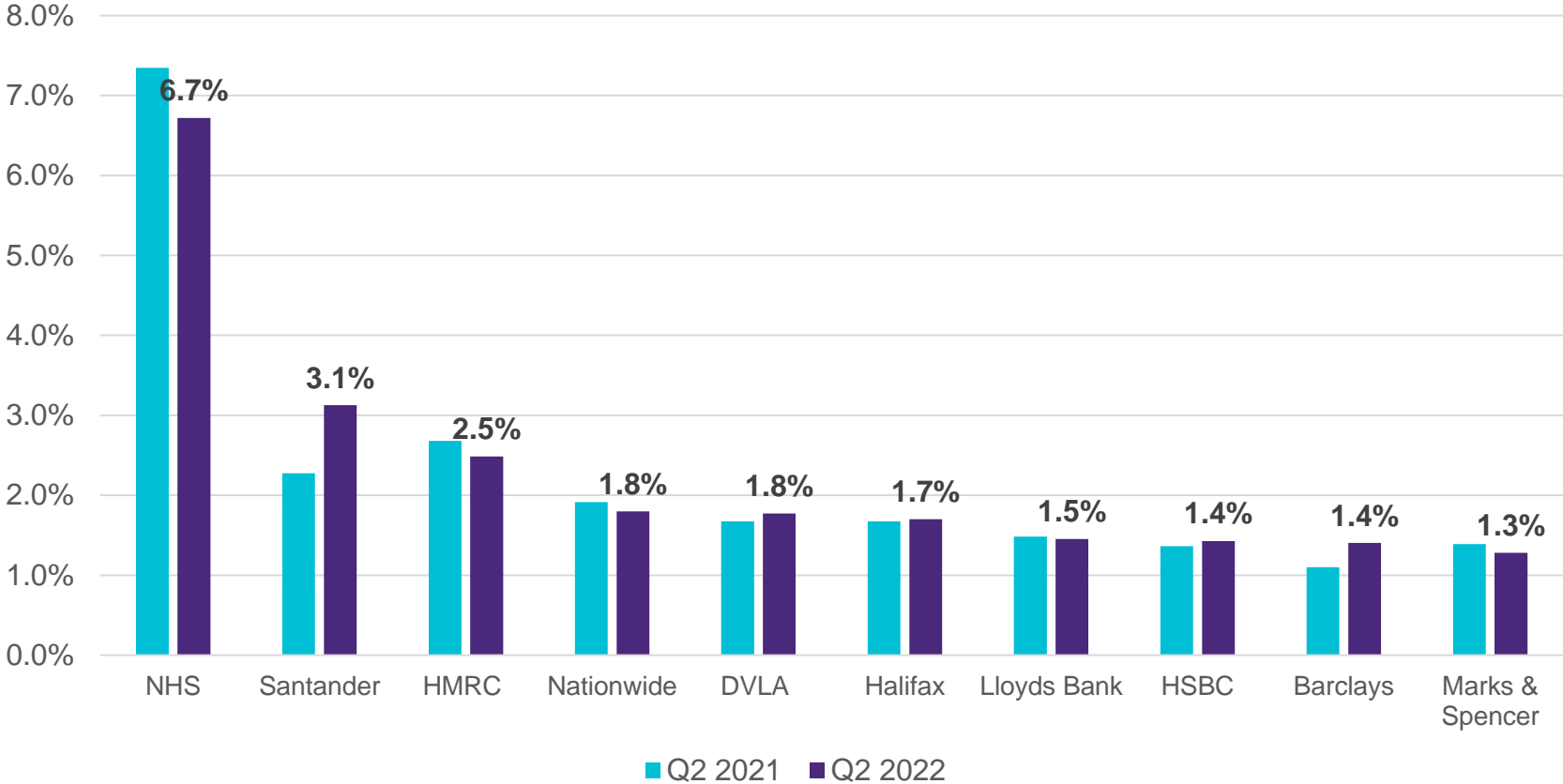
Checkatrade, Ocado and McCarthy Stone now present in the Door Drop channel when they weren't a year ago

Share of Door Mat (% of Door Drop items)
Q2 2022 vs Q2 2021



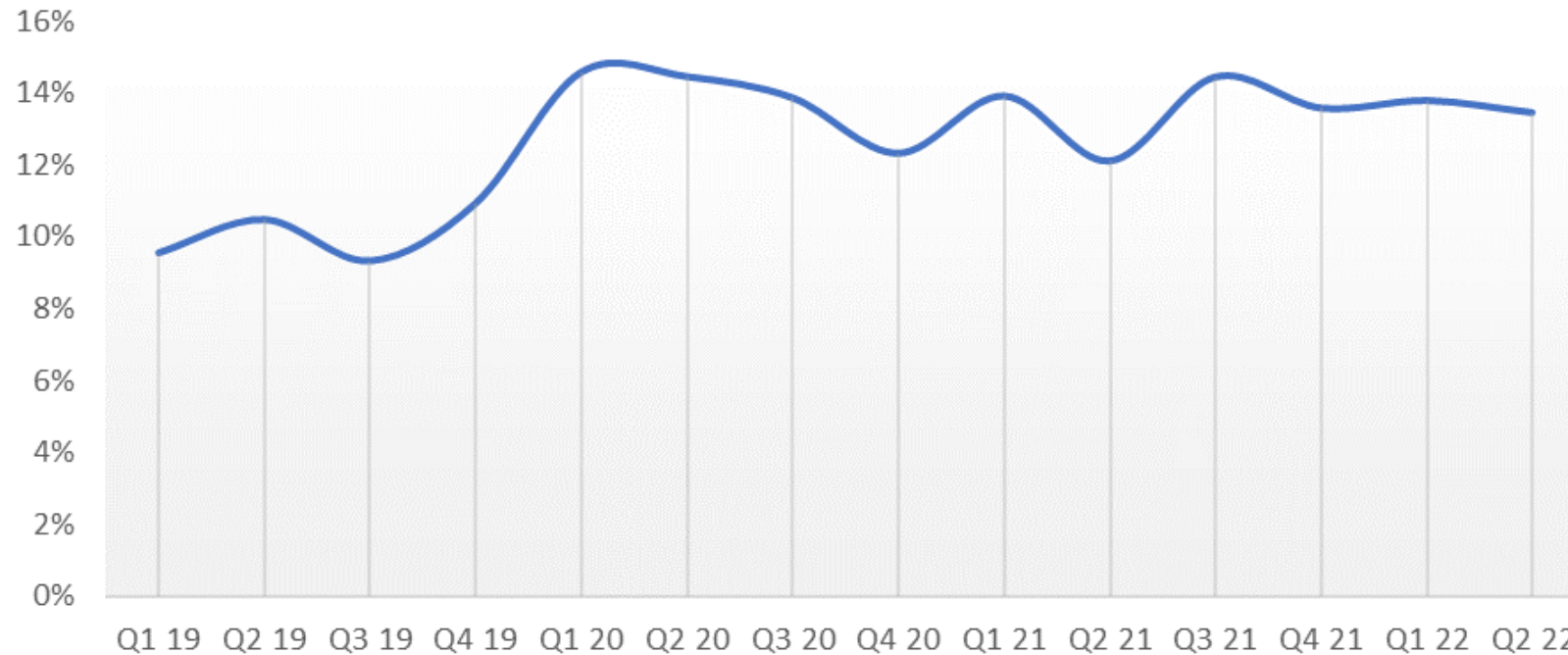
Santander records the highest share gains in the Business Mail market

Share of Door Mat (% of Business Mail items)
Q2 2022 vs Q2 2021



The top 10 mail advertisers accounted for 13% of total mail volumes in Q2

Top 10 Mail Advertisers % Share of Doormat



Q2 2017 to Q2 2022: Half a decade of JICMAIL data!

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Thanks

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