

JICMAIL Quarterly Results

Q2 2023



Mail Media Metrics



1.

The mail opportunity

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2.

The retail opportunity

With store footfall effects increasing there is increasingly a missed mail opportunity at play for bricks and mortar brands who are not investing in the mail channel.

3.

Share of doormat

A handful of household names have taken advantage of share of doormat gains in Q2, including: Nationwide, BT, Farmfoods, Checkatrade, Hillarys and Sky Mobile.

Mail Engagement Q2 2023

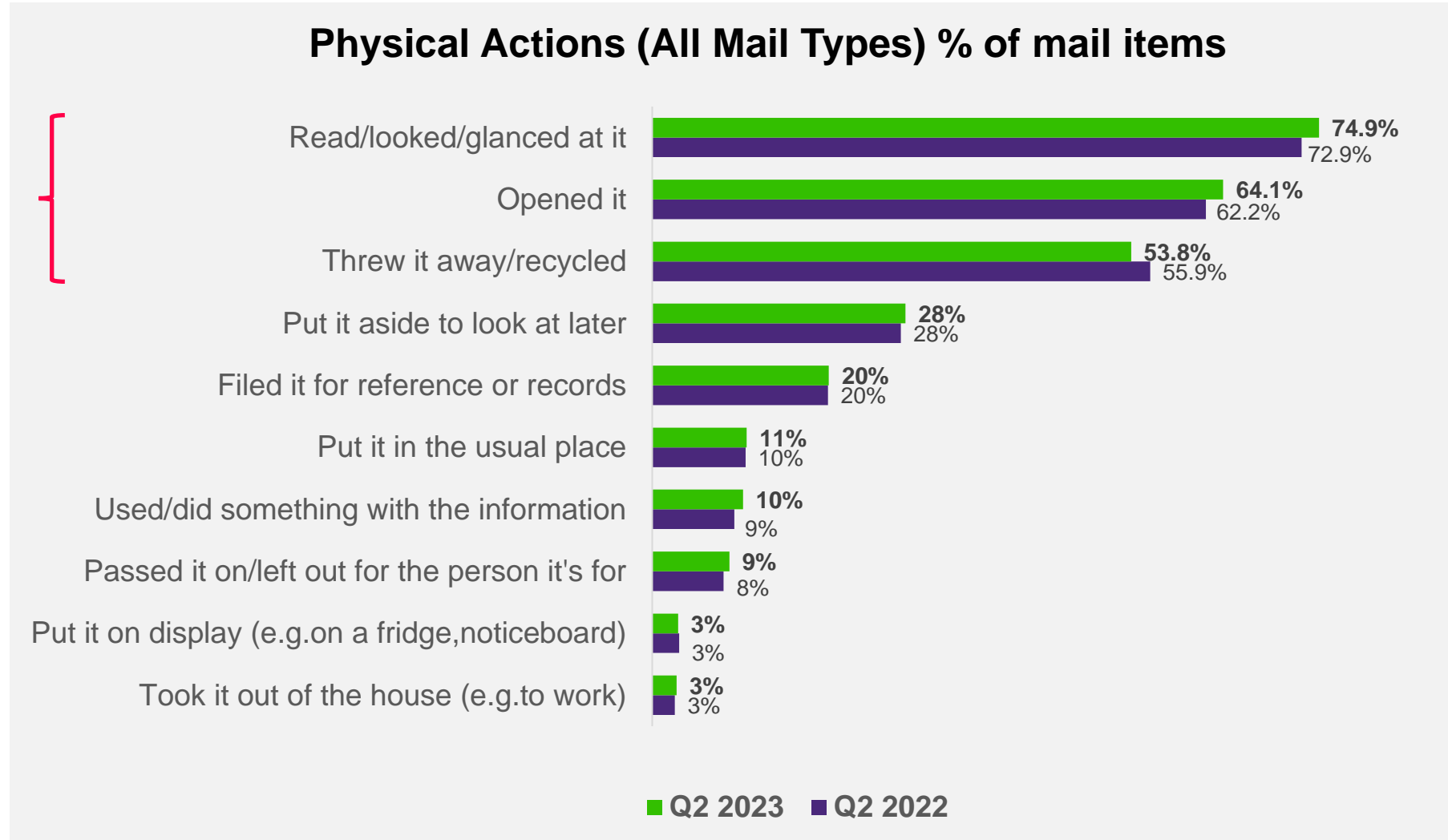
Reach, Frequency, Lifespan and Attention



Mail Media Metrics

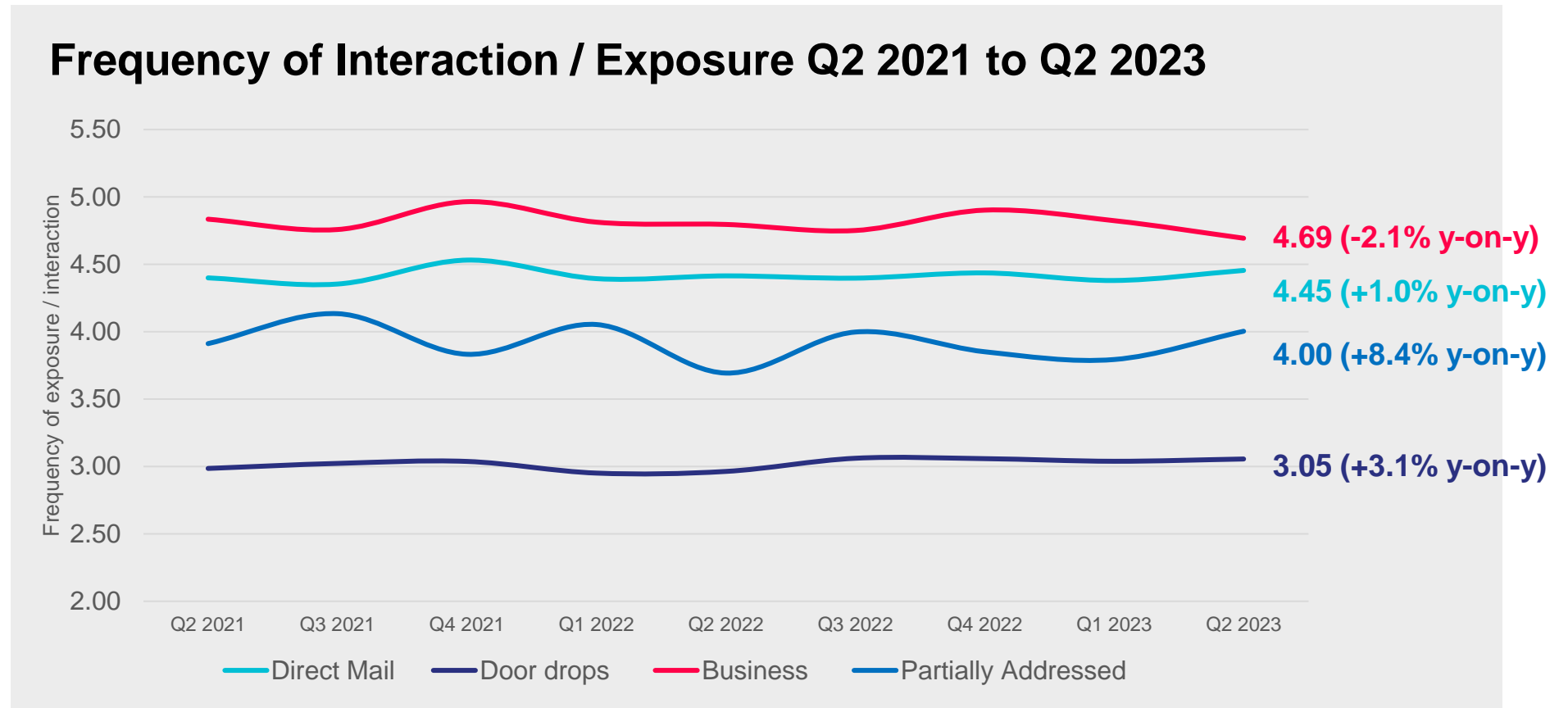
Mail open, read and retention rates continue to grow for the fourth quarter running

Fourth quarter in a row in which mail read, open and retention rates have grown year-on-year



Steady upward trend in consumer interaction rates across all advertising mail types

Partially addressed mail has shown the strongest increase in interaction rates (+8.4% year on year), while Business Mail frequency is down marginally.

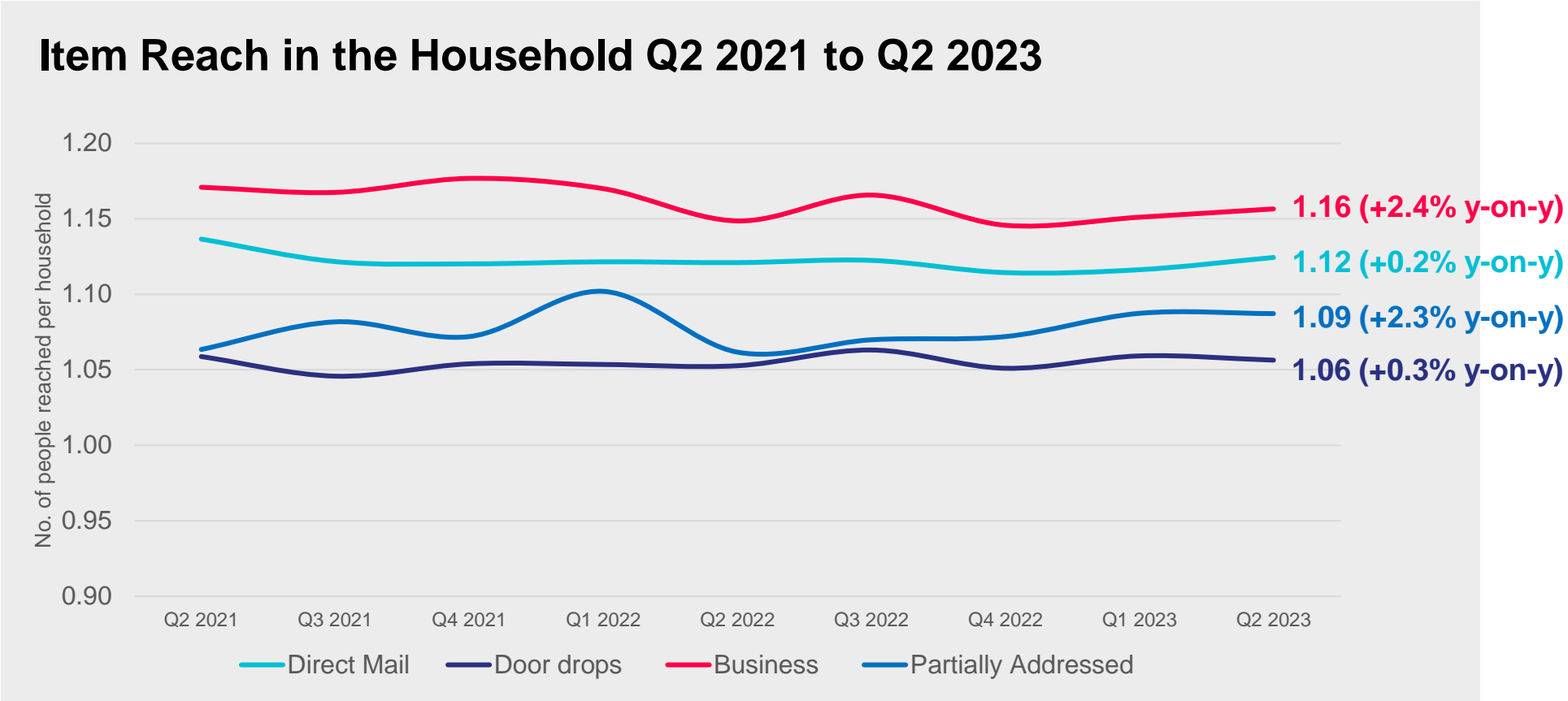


Source: JICMAIL Item Data Q2 2017 to Q2 2023 n=283,699 mail items

Uplift in mail sharing across the board in Q2 2023

Business Mail and Partially Addressed recorded the largest increases in item reach in Q2 2023

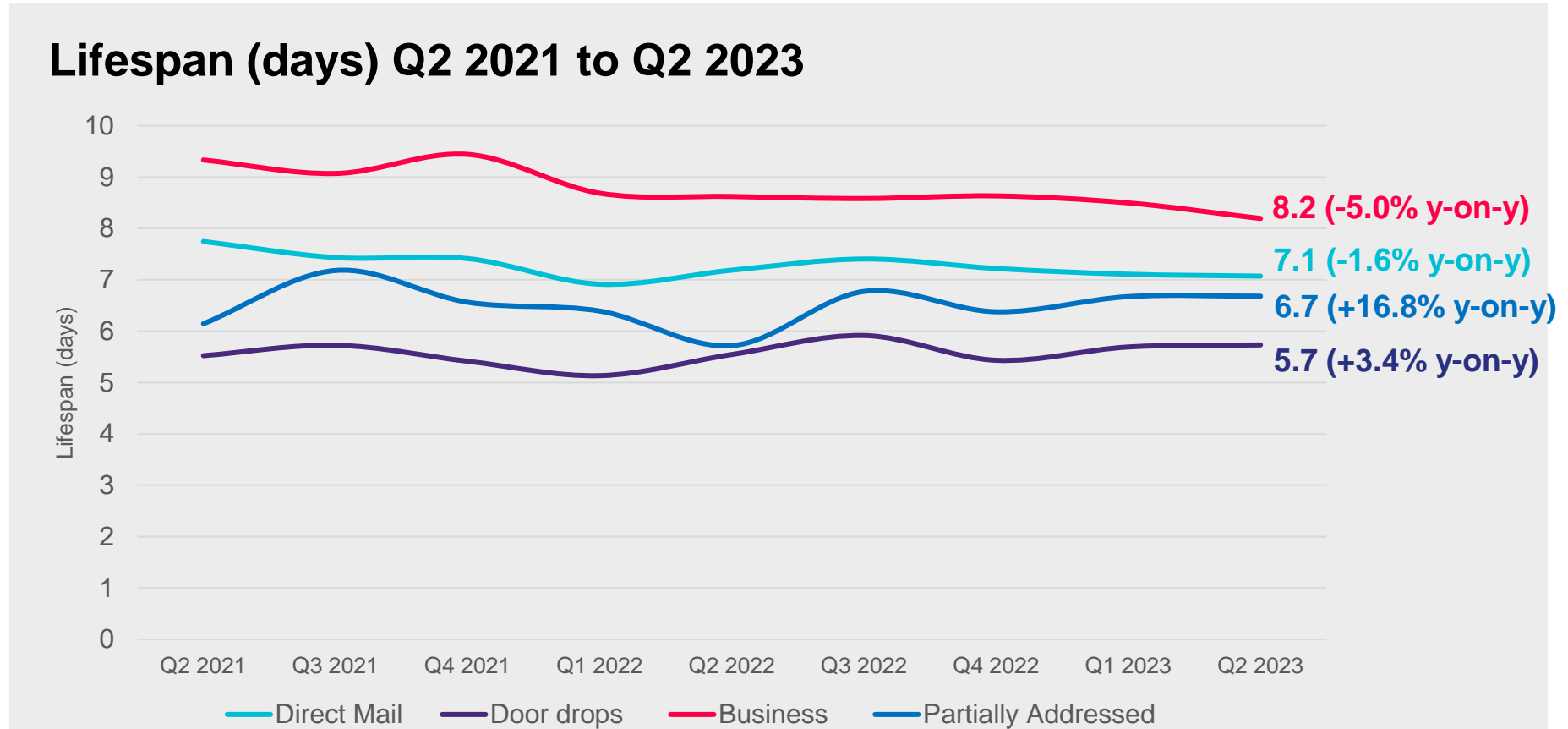
Item Reach in the Household Q2 2021 to Q2 2023



Source: JICMAIL Item Data Q2 2017 to Q2 2023 n=283,699 mail items

Increased Door Drop and PAM lifespan in Q2 2023

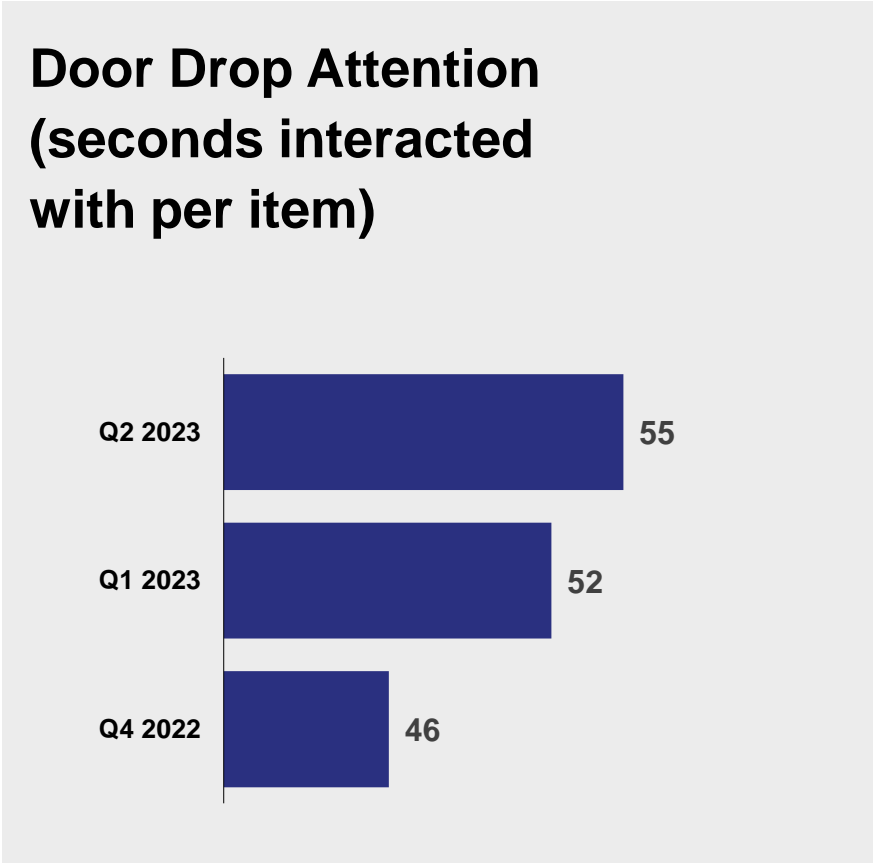
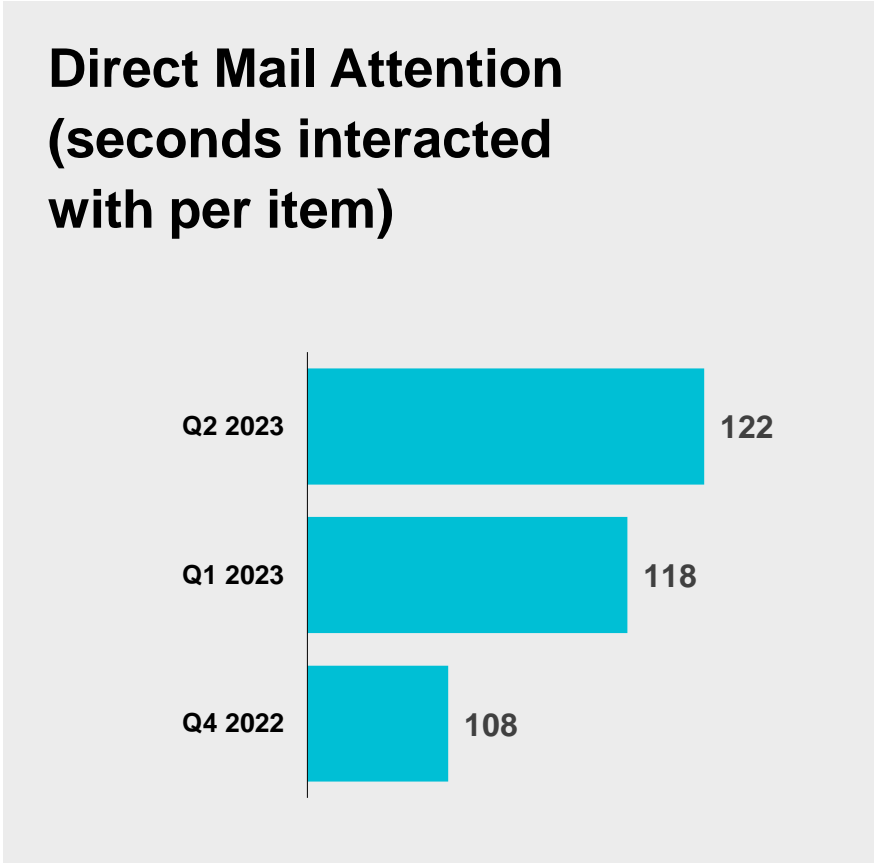
While Door Drop and PAM lifespan increased, Business Mail and DM lifespan declined slightly in Q2.



Source: JICMAIL Item Data Q2 2017 to Q2 2023 n=283,699 mail items

Direct Mail and Door Drop attention climbed steadily in Q2 2023

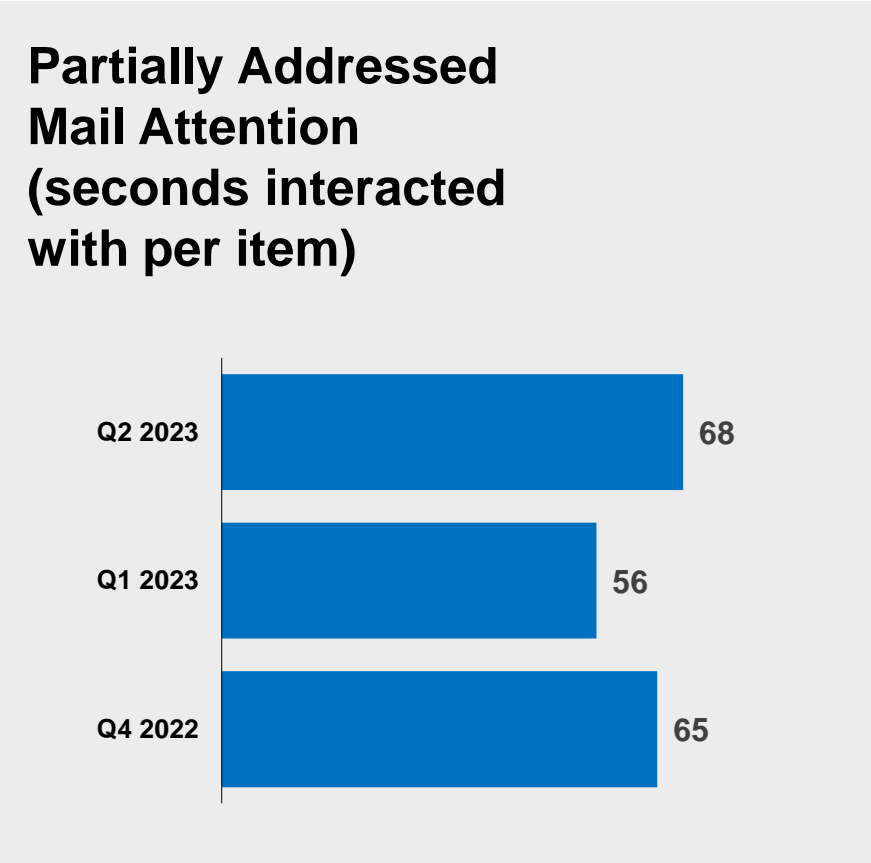
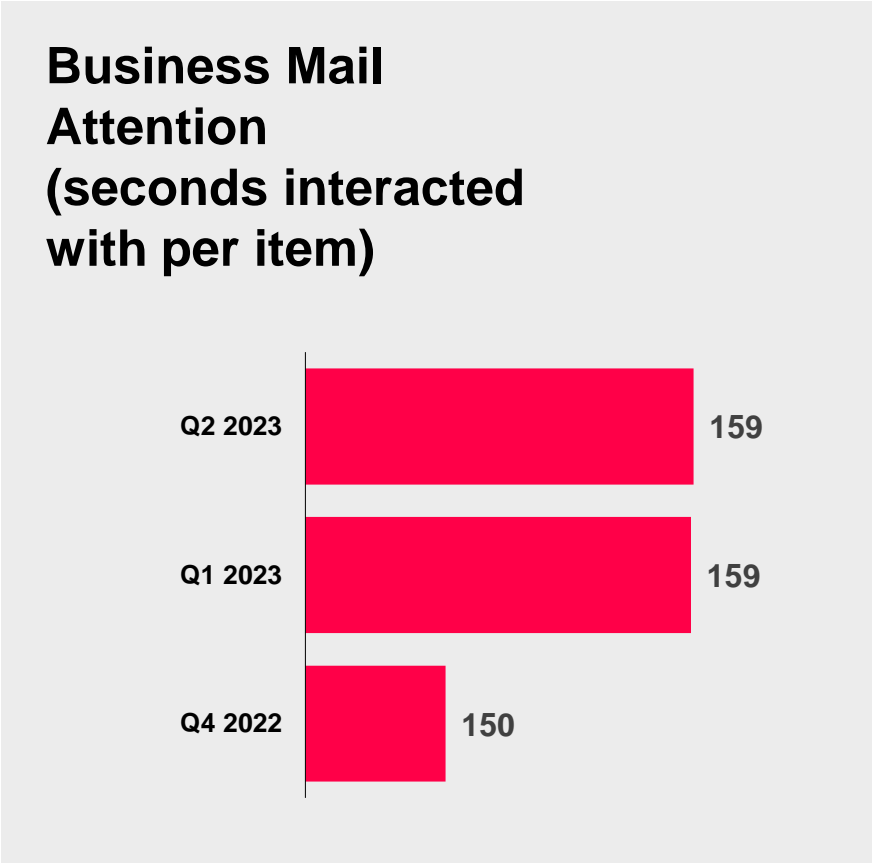
The average piece of Direct Mail was engaged with for over two minutes across a 28 day period in Q2 2023. For Door Drops the figure was 55 seconds.



Source: JICMAIL Item Data Q2 2017 to Q2 2023 n=283,699 mail items

Business Mail attention stable at 159 seconds in Q2 2023

The average piece of PAM was engaged with for 68 seconds in Q2 2023



Source: JICMAIL Item Data Q2 2017 to Q2 2023 n=283,699 mail items

Content highlights for Q2 2023



Direct Mail

Entertainment / activity
info content frequency:
4.9 (+8% year on year)

Info about local services
item reach: **1.13 (+6%)**



Door Drops

Vouchers and coupons:
frequency: **3.5 (+6%)**

Info about local
services frequency: **5.7
days (+8%)**



Business Mail

Appointment related
information item reach:
1.22 (+5%)

Special offers / discounts
frequency: **5.88 (+6%)**

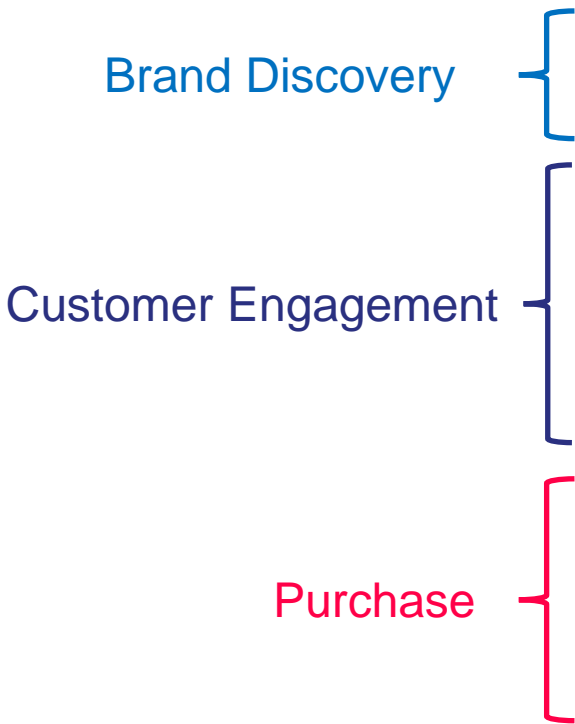
Mail Effectiveness Q2 2023

Commercial Actions

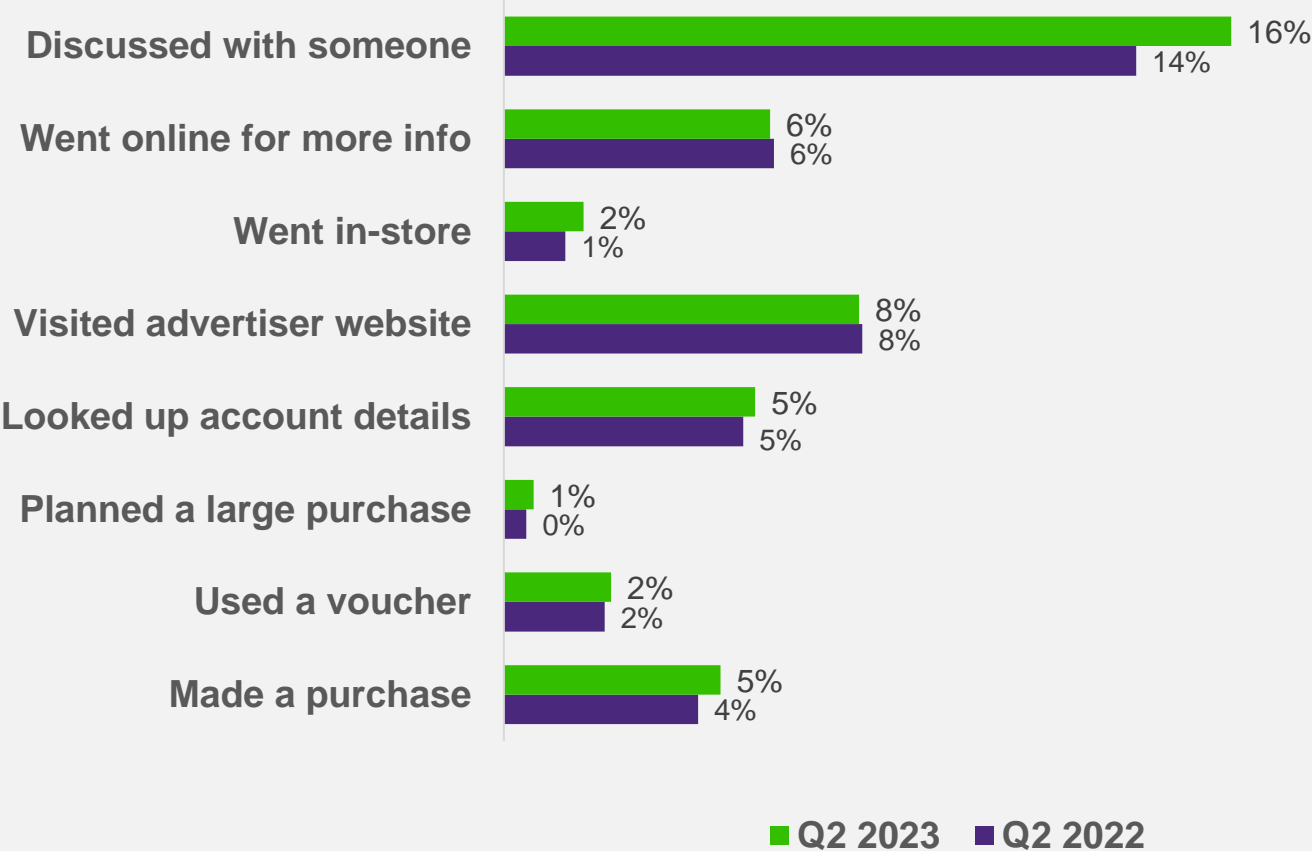


Mail Media Metrics

Improved mail effectiveness across all stages of the customer journey



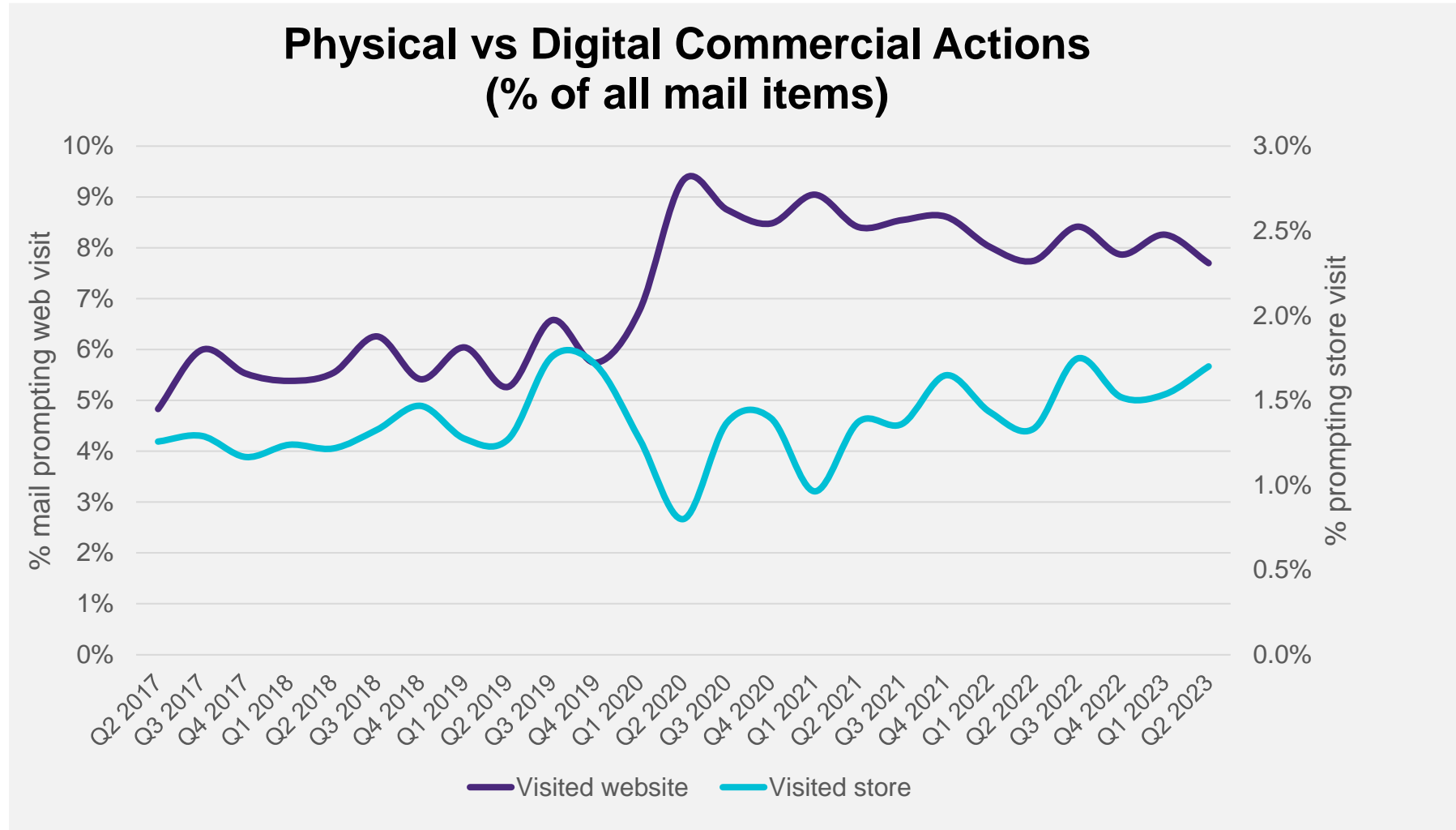
Commercial Actions (All Mail Types) % of mail items



Source: JICMAIL Item Data Q2 2022 n=11,463 mail items; Q2 2023 n=10,590

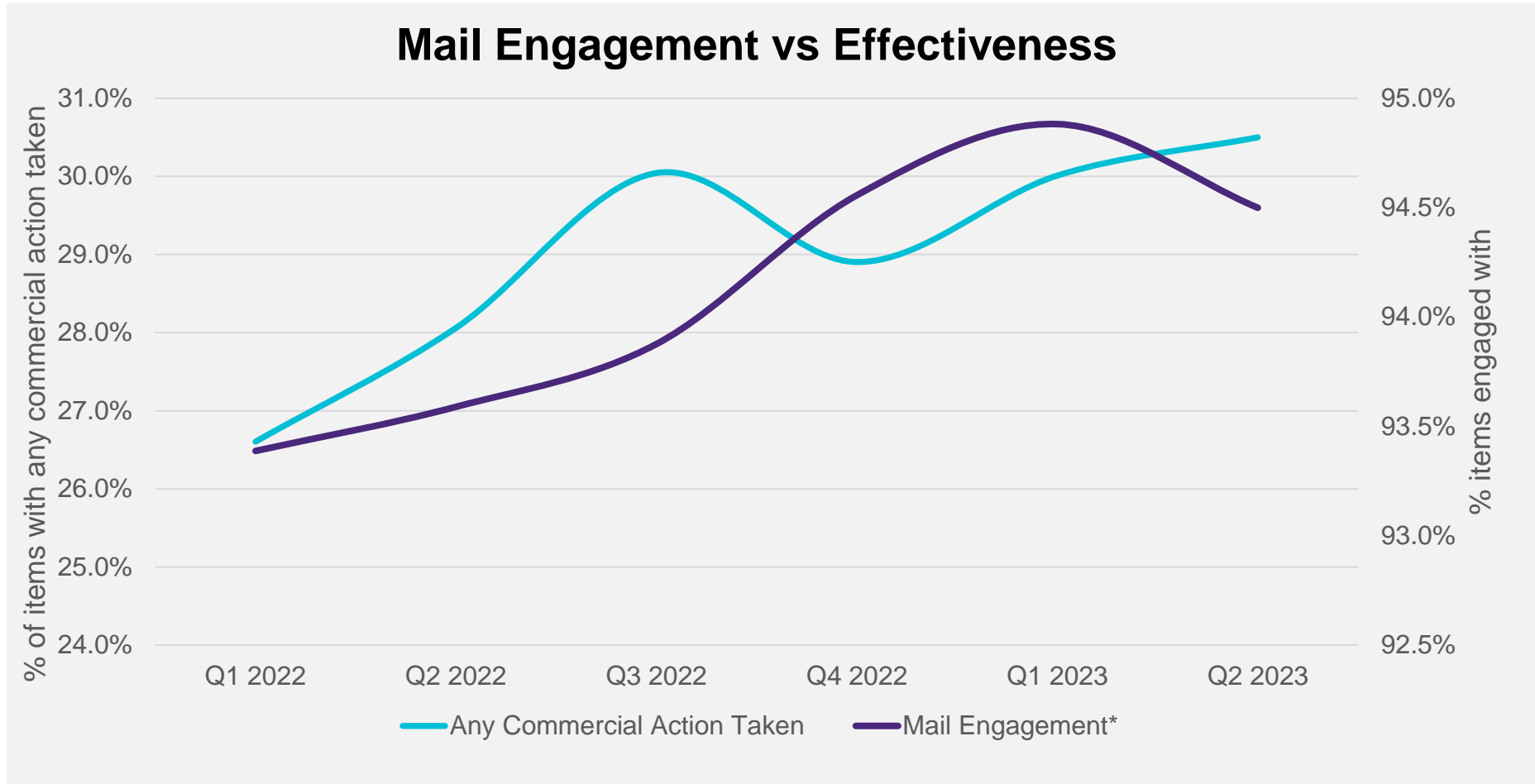
Rebound in store footfall driven by mail in Q2 2023

Despite the challenges faced by the British high street, mail continues to be an effective store footfall driver, alongside its digital effectiveness.



Mail effectiveness growth outstrips engagement in Q2 2023

Mail effectiveness is now at its highest level in a year and half



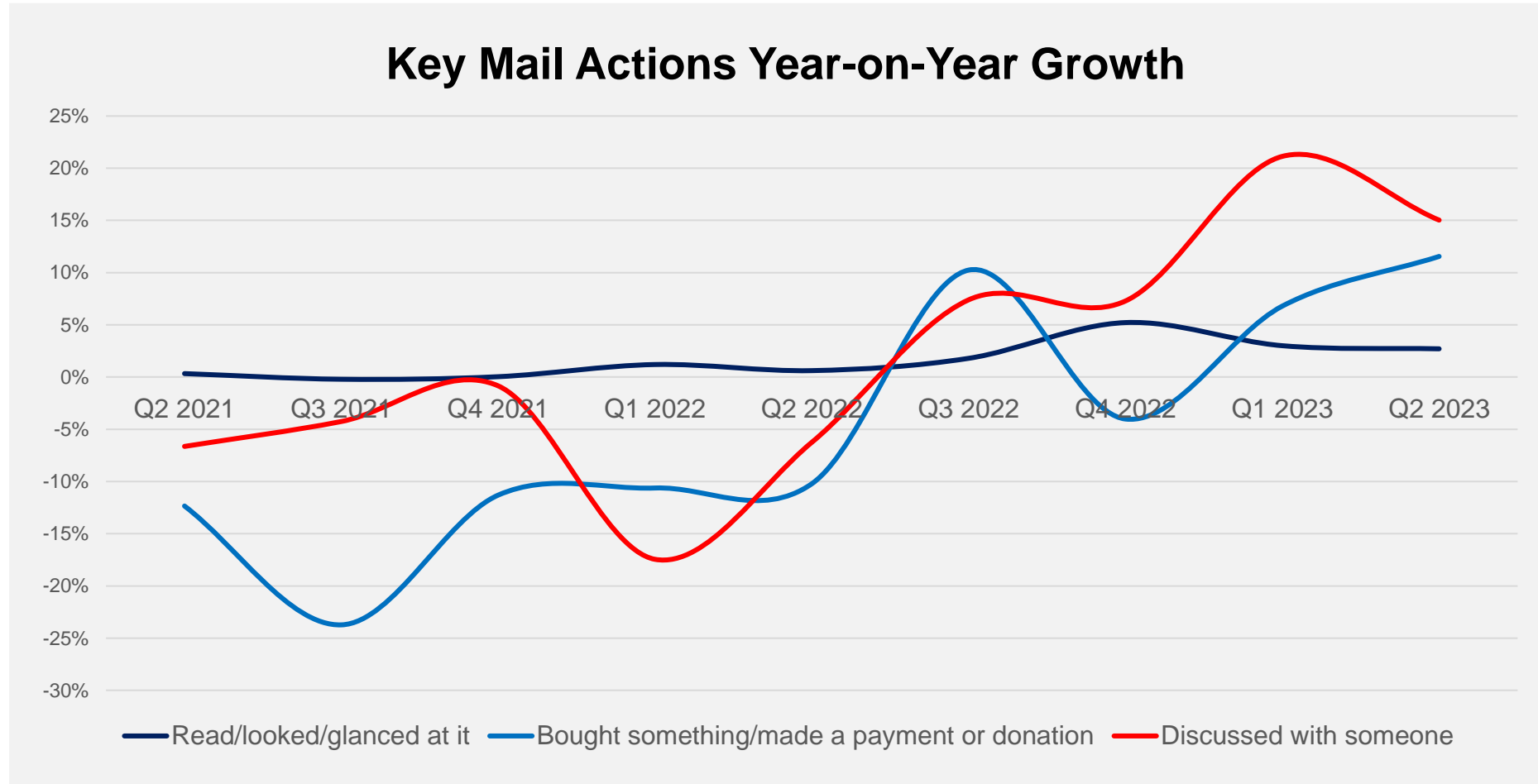
Source: JICMAIL Item Data Q2 2017 to Q2 2023 n=283,699 mail items

* Engaged Mail = % of mail with any physical action taken other than being immediately thrown away



The last twelve months have seen healthy growth in key physical and commercial actions for mail

Year on year growth in read rates, purchase rates and word of mouth for the last year.



Source: JICMAIL Item Data Q2 2017 to Q2 2023 n=283,699 mail items

* Engaged Mail = % of mail with any physical action taken other than being immediately thrown away



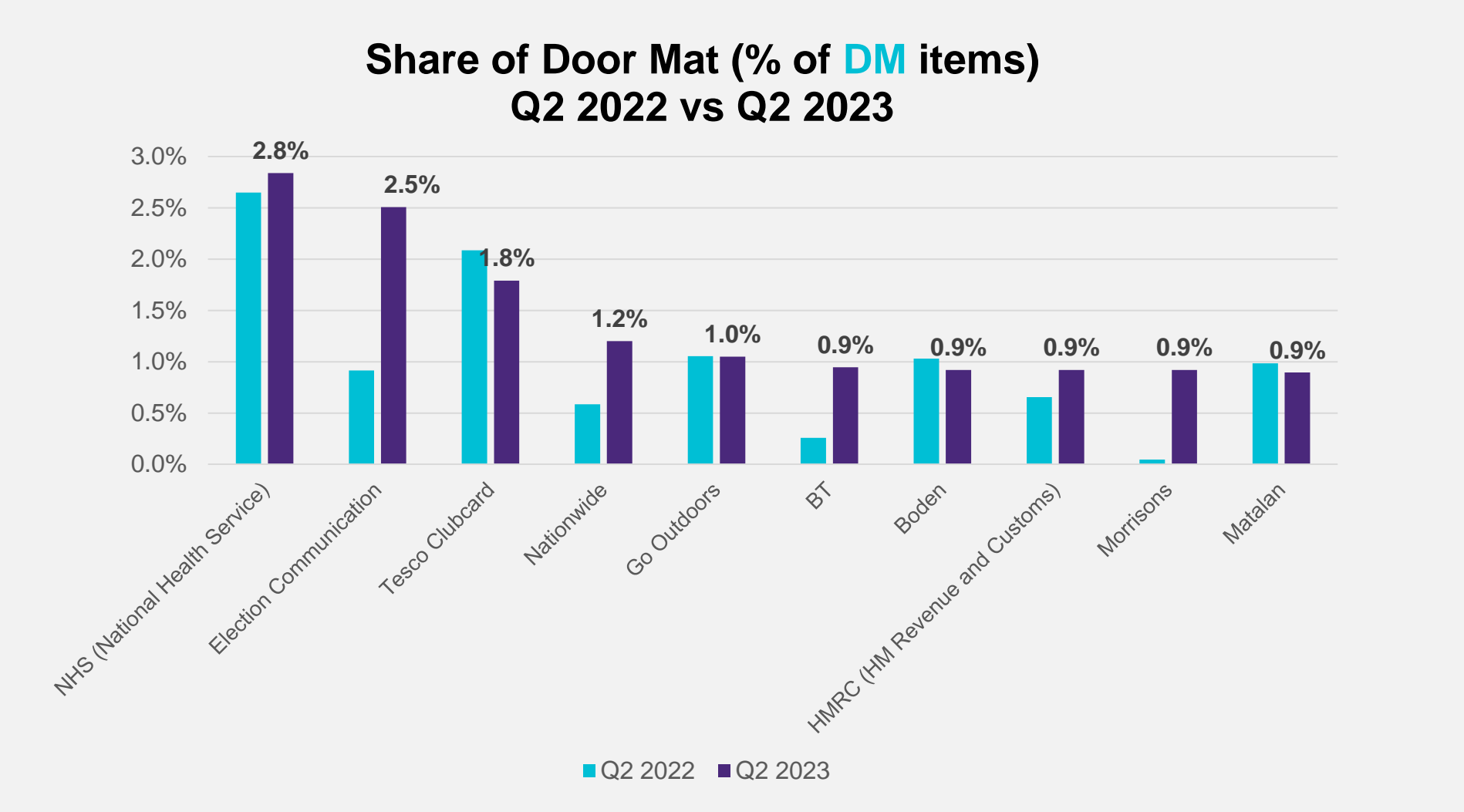
Advertiser Activity Q2 2023

Share of Doormat

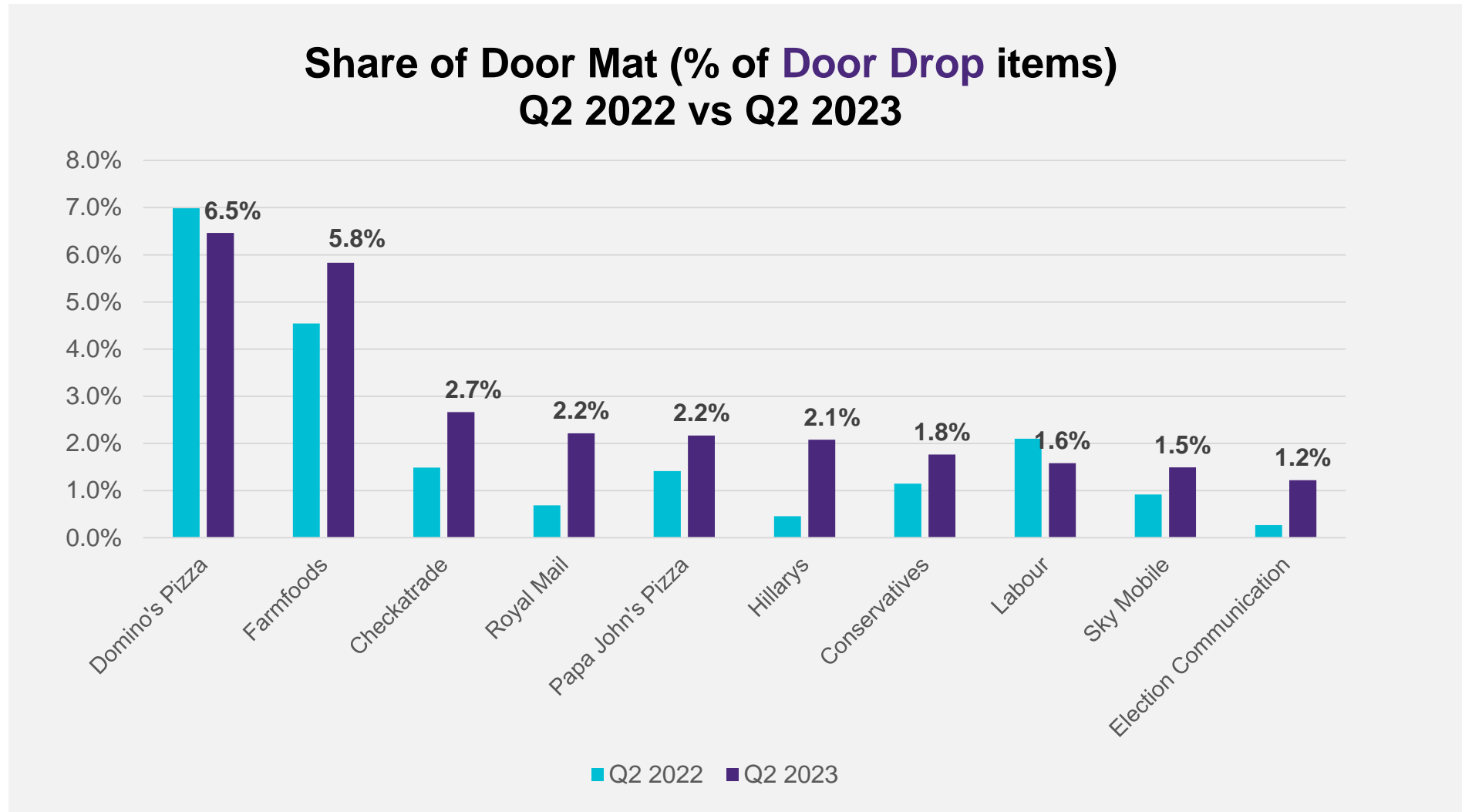


Mail Media Metrics

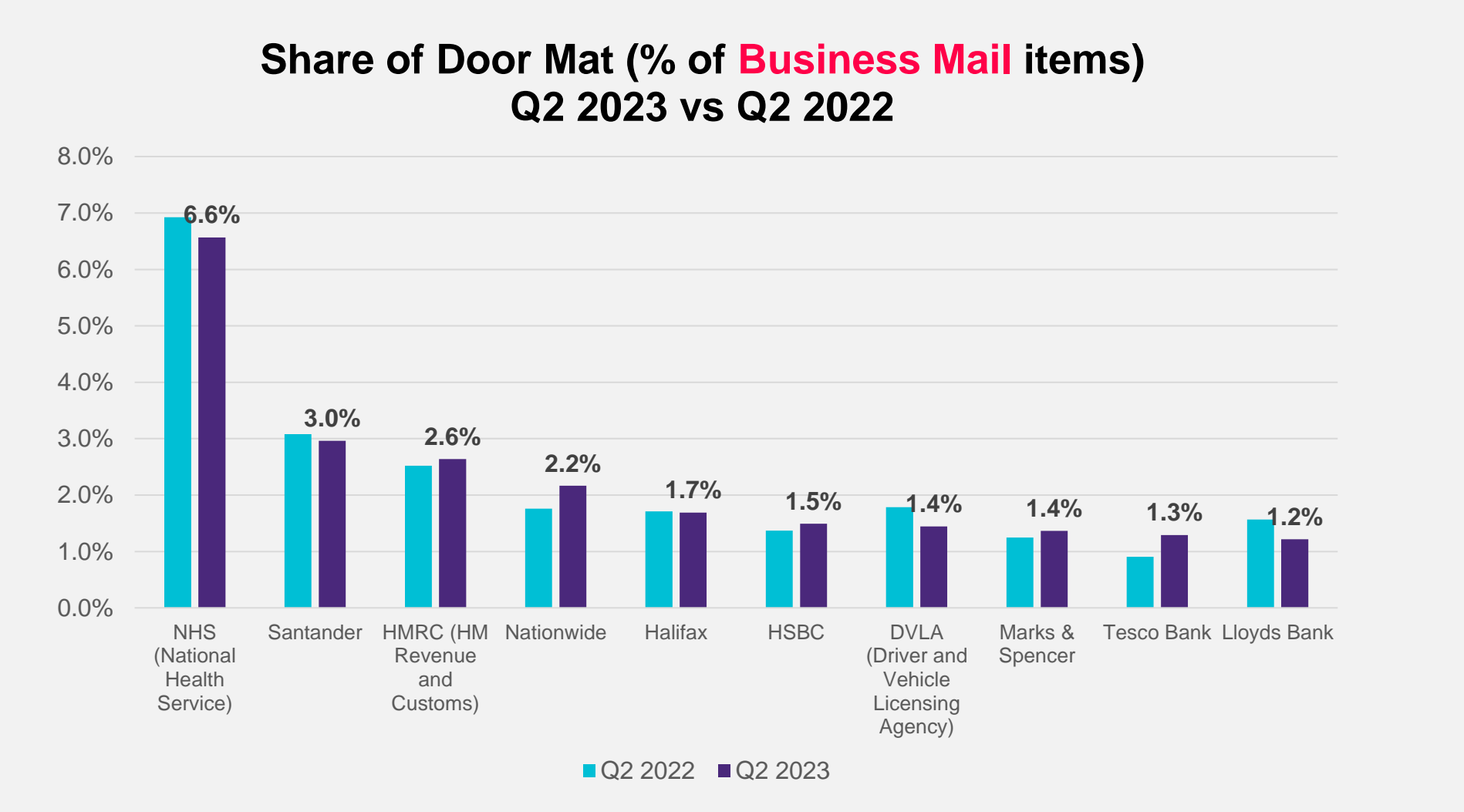
Local Election activity impacts Direct Mail share of doormat in Q2. Nationwide, BT and Morrisons also make share gains



Door Drop share gains for Farmfoods, Checkatrade, Papa Johns and Hillarys



Continued stability in the Business Mail share of doormat rankings



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New mail and audience detail coming in Q3!

Sectors & Content

Bank / Building
Society separated
from Insurance
Services

QR Codes

Actions

Purchased Online
Purchased In-store

Emailed sender
Used QR code
Downloaded app

Threw away and
Recycled separated

Customers

Current Customer
(warm)

Not current customer
(cold)

Thanks

 jicmail.org.uk

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

 ian@jicmail.org.uk

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

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