

JICMAIL

Q1 2021 Results Analysis
May 2021

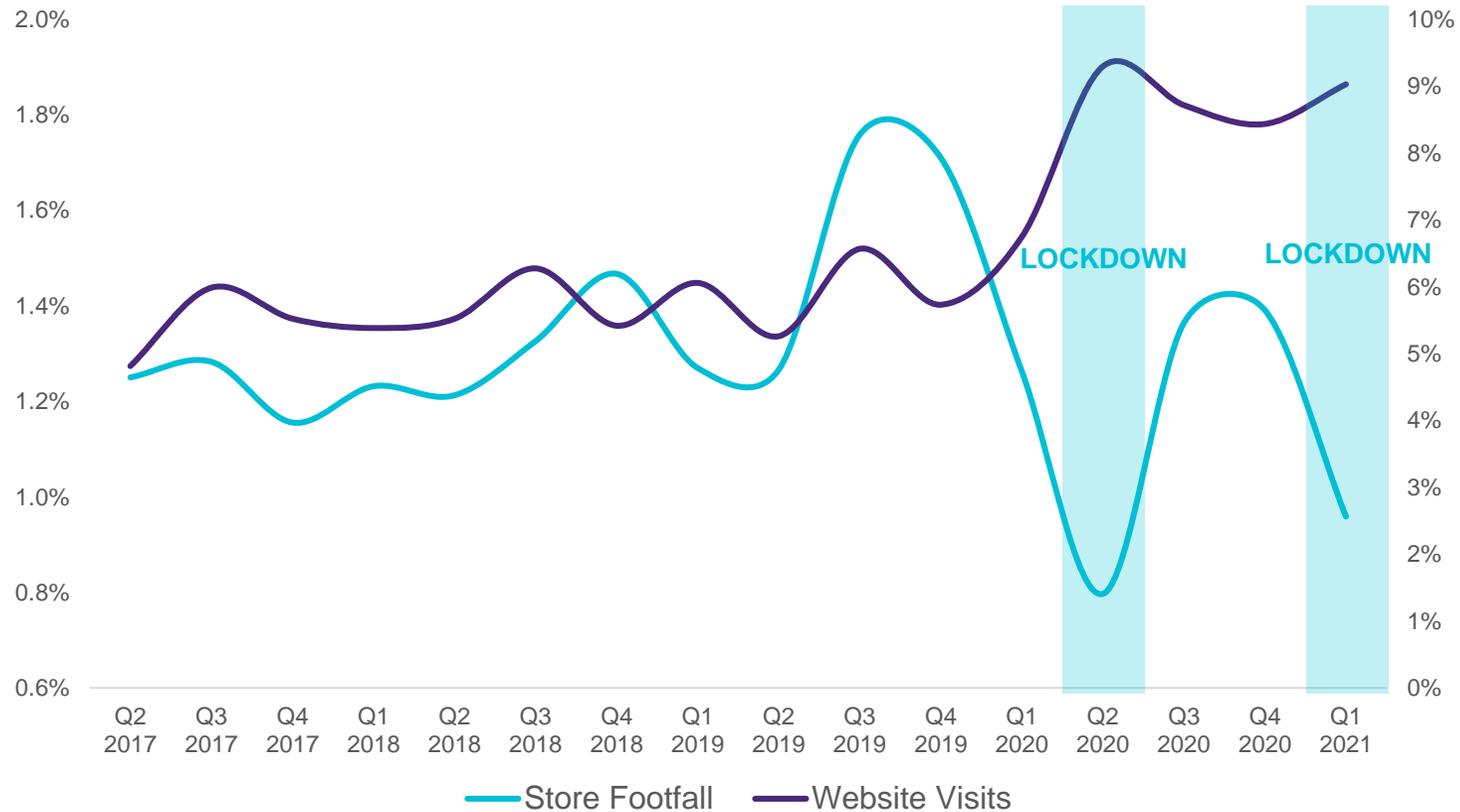


Mail Media Metrics



Q1 HIGHLIGHT: mail drives fewer people in store during lockdown but makes up for it by driving more people online. In between lockdowns, footfall effects rebound.

% of Direct Mail, Business Mail and Door Drops driving people in store vs online

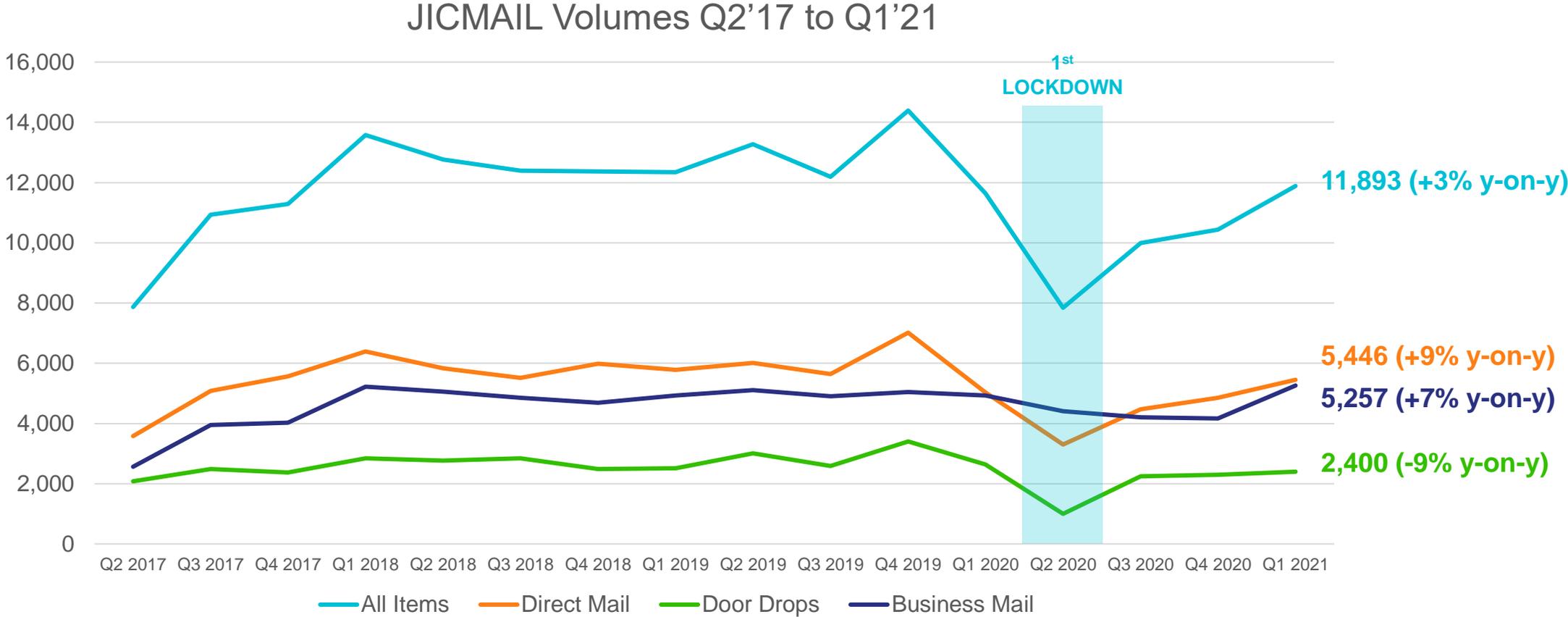


The story in Q1 2021

- 1. Mail volumes up.**
- 2. Commercial effectiveness (particularly digital) up.**
- 3. Evidence of long term frequency growth.**
- 4. Small businesses engage with Mail.**

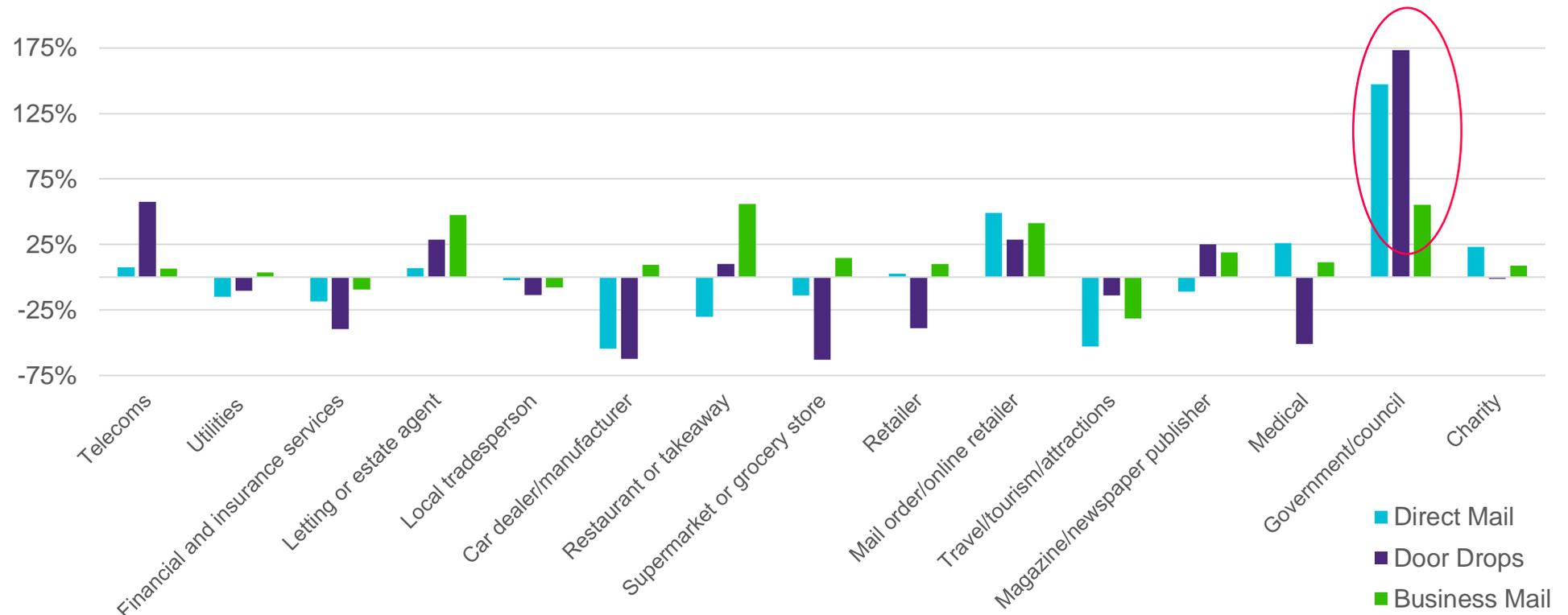


Mail volumes are up year-on-year for the first time since the start of the pandemic

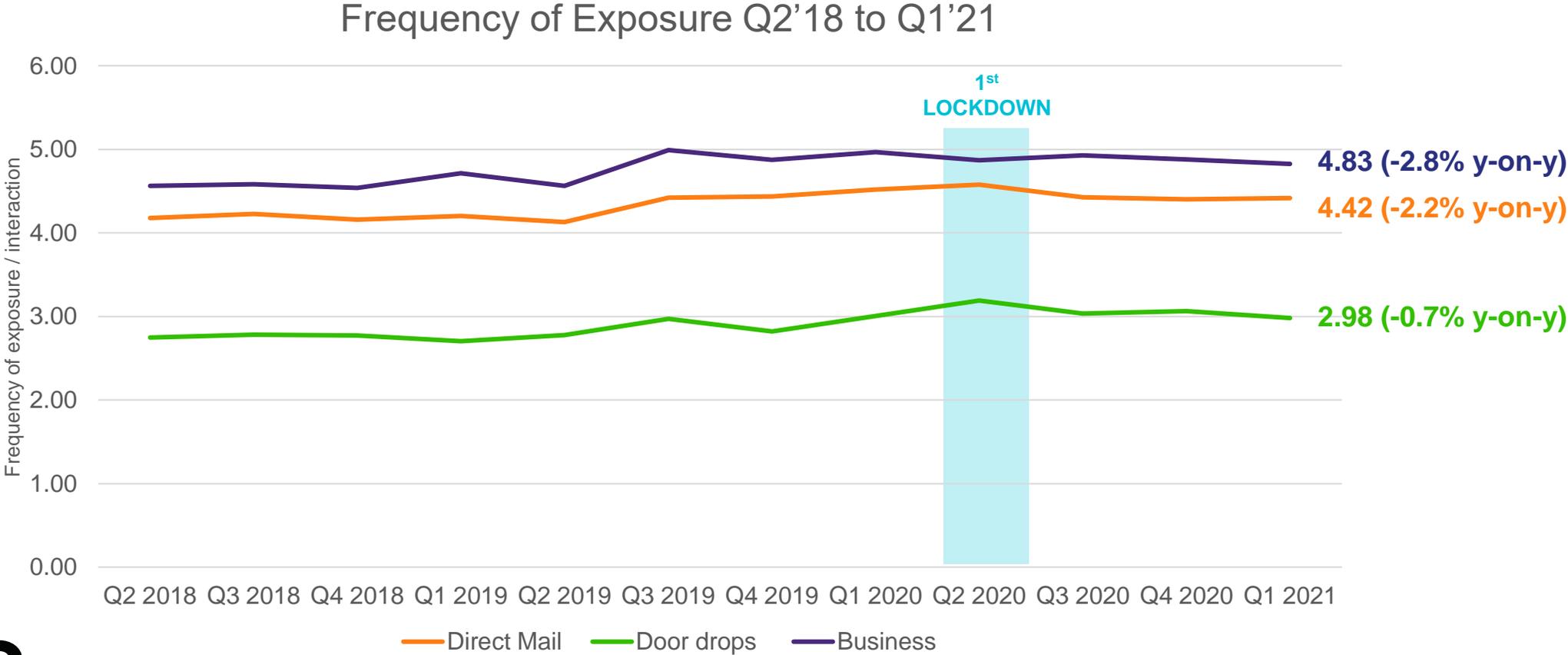


Government has been a huge driver of volume growth in Q1. Mail order and Telecoms have also contributed.

Q1 '21 year on year volume changes by category



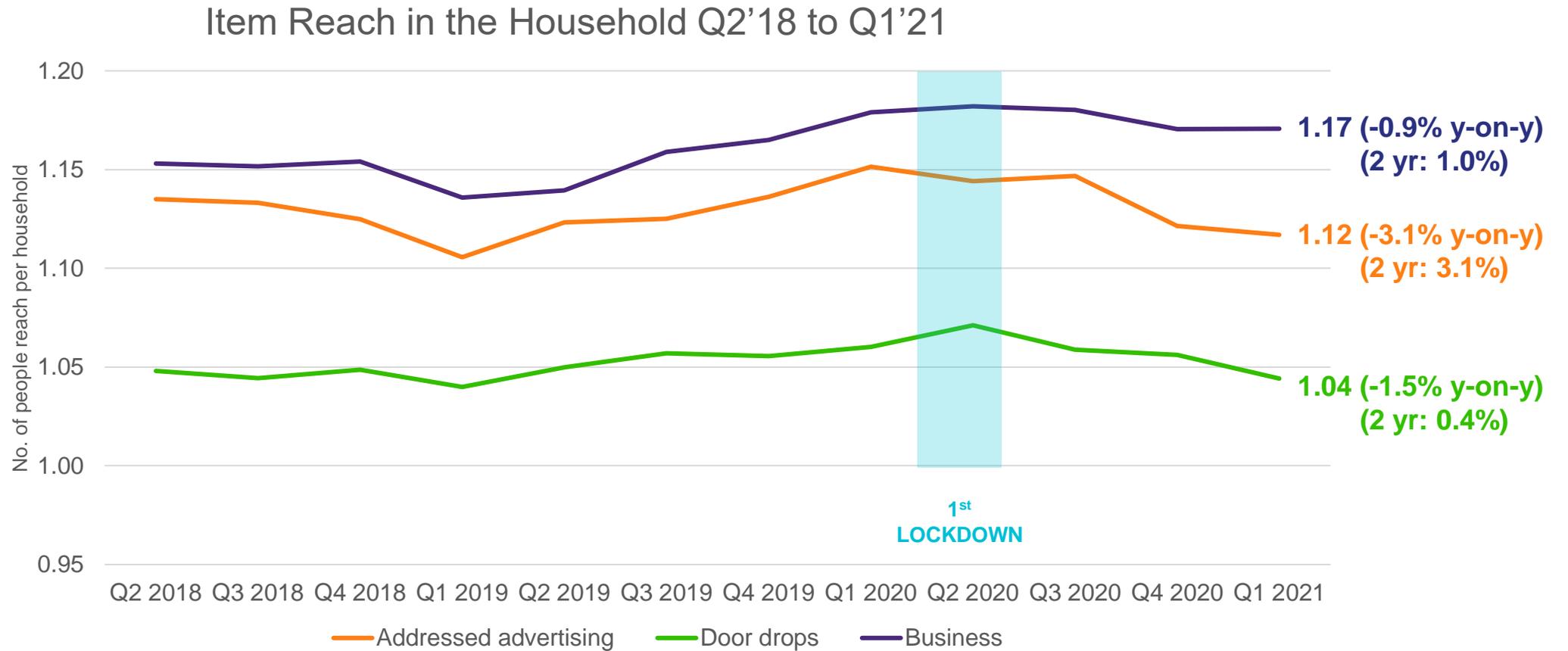
Frequency of interaction has taken a slight dip as mail volumes increase



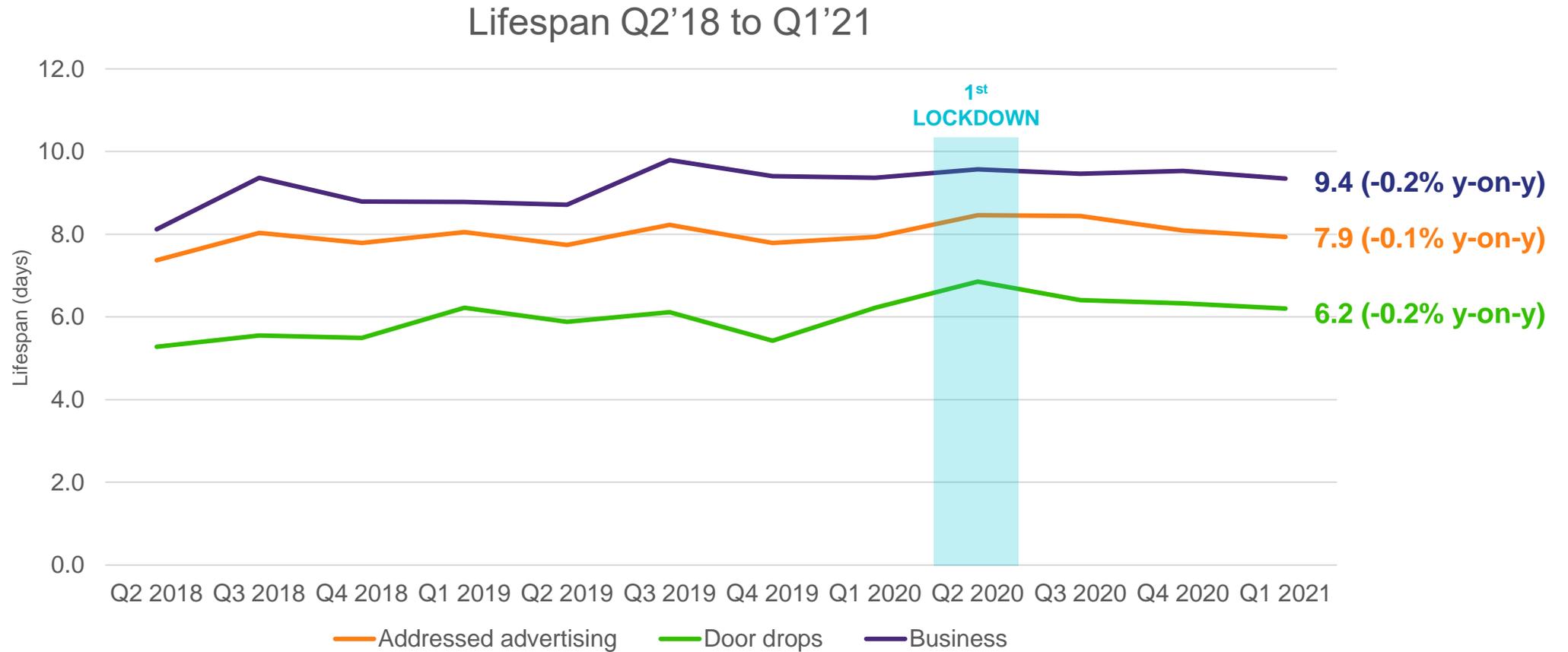
However, there is evidence of long term mail behaviour changes with growth in frequency seen over a two year time frame

Q1 2021 Frequency	Year-on-Year Growth	Two Year Growth Rate
Direct Mail	-2.2%	+5.1%
Business Mail	-2.8%	+2.4%
Door Drops	-0.7%	+10.3%

Item reach has also recorded some declines as volumes have increased, but again the two year trend is positive

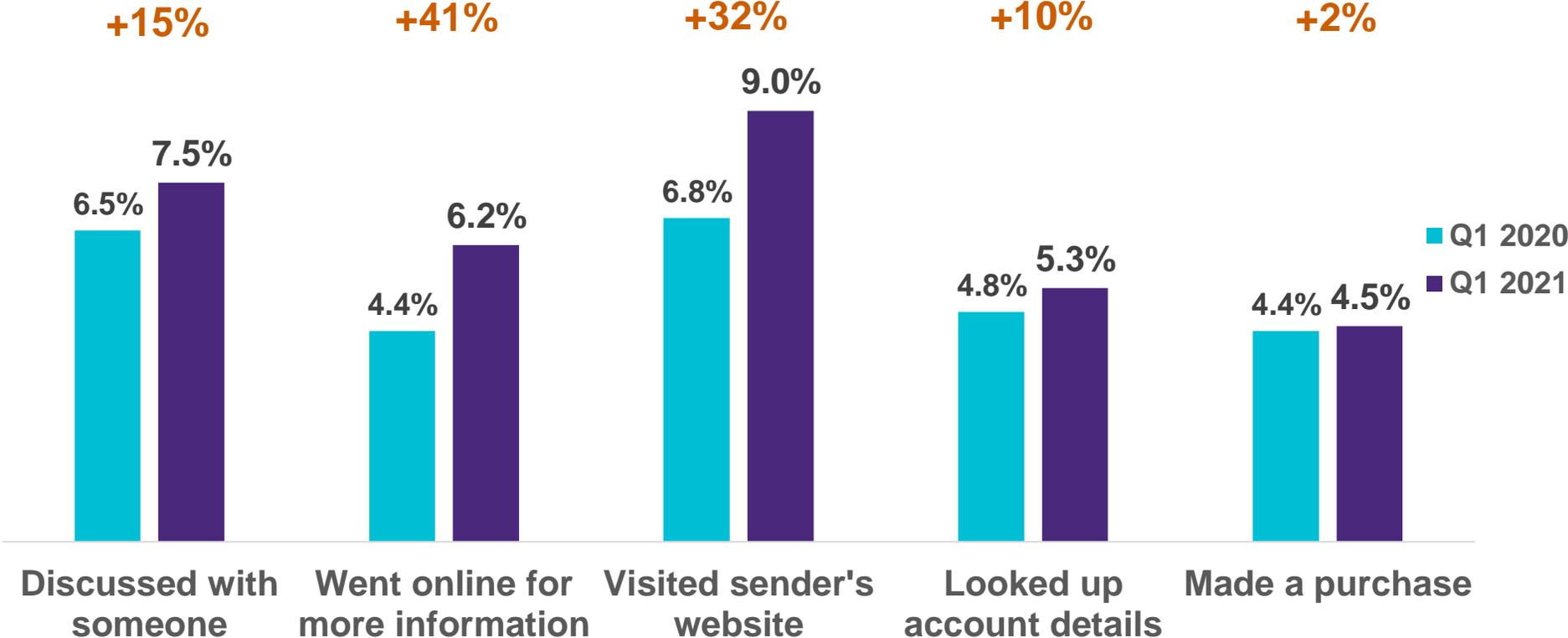


Mail lifespan virtually flat year-on-year

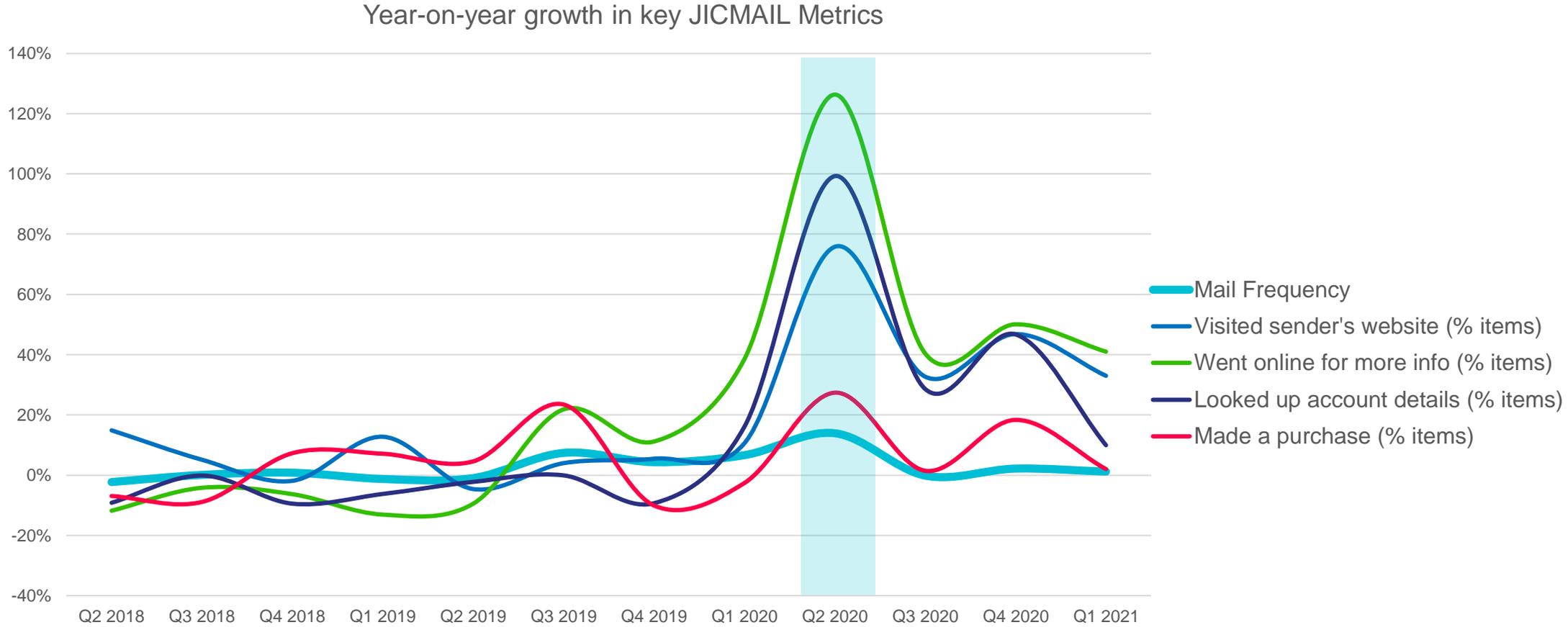


Mail effectiveness up year on year

Mail Commercial Actions (All Mail Types) % of mail items

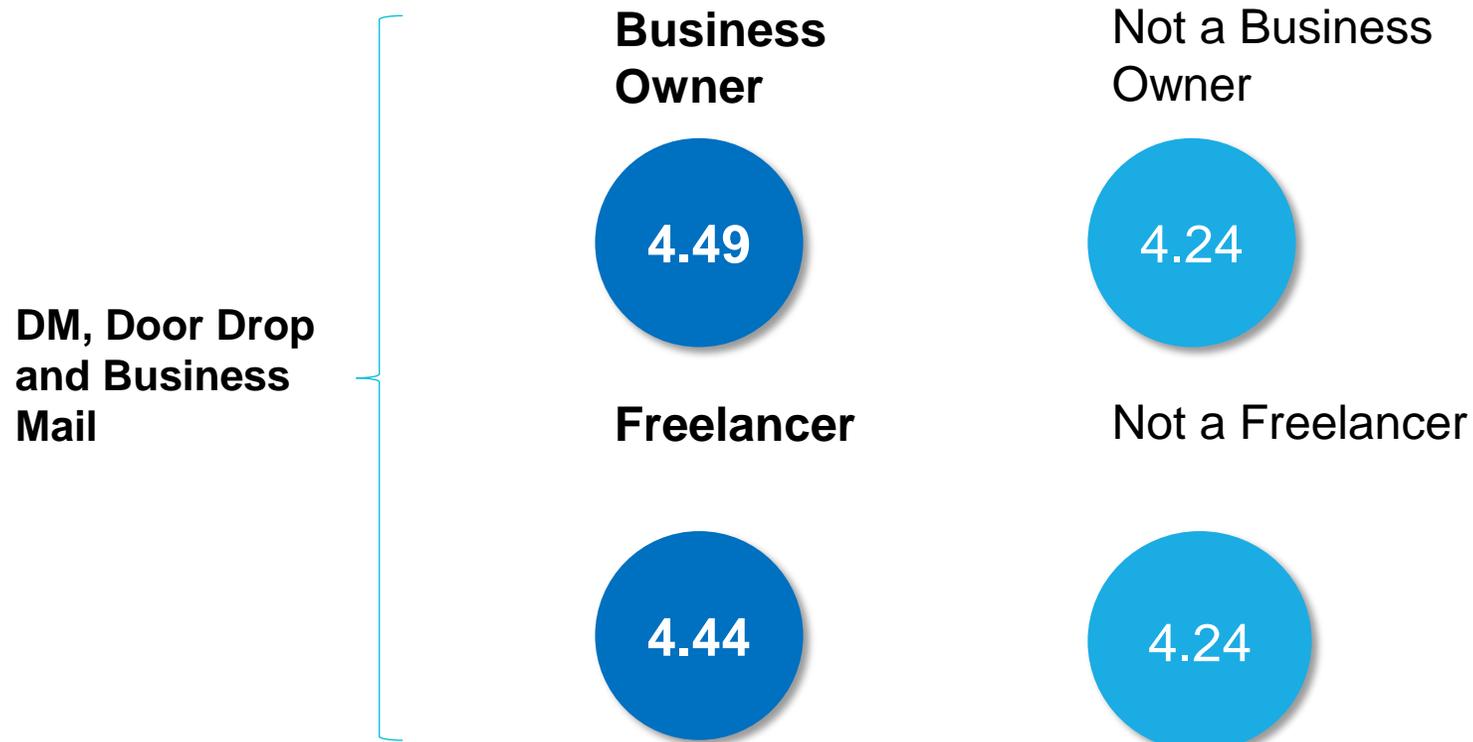


Mail is becoming more efficient: digital effectiveness growth is outstripping frequency of interaction growth rates



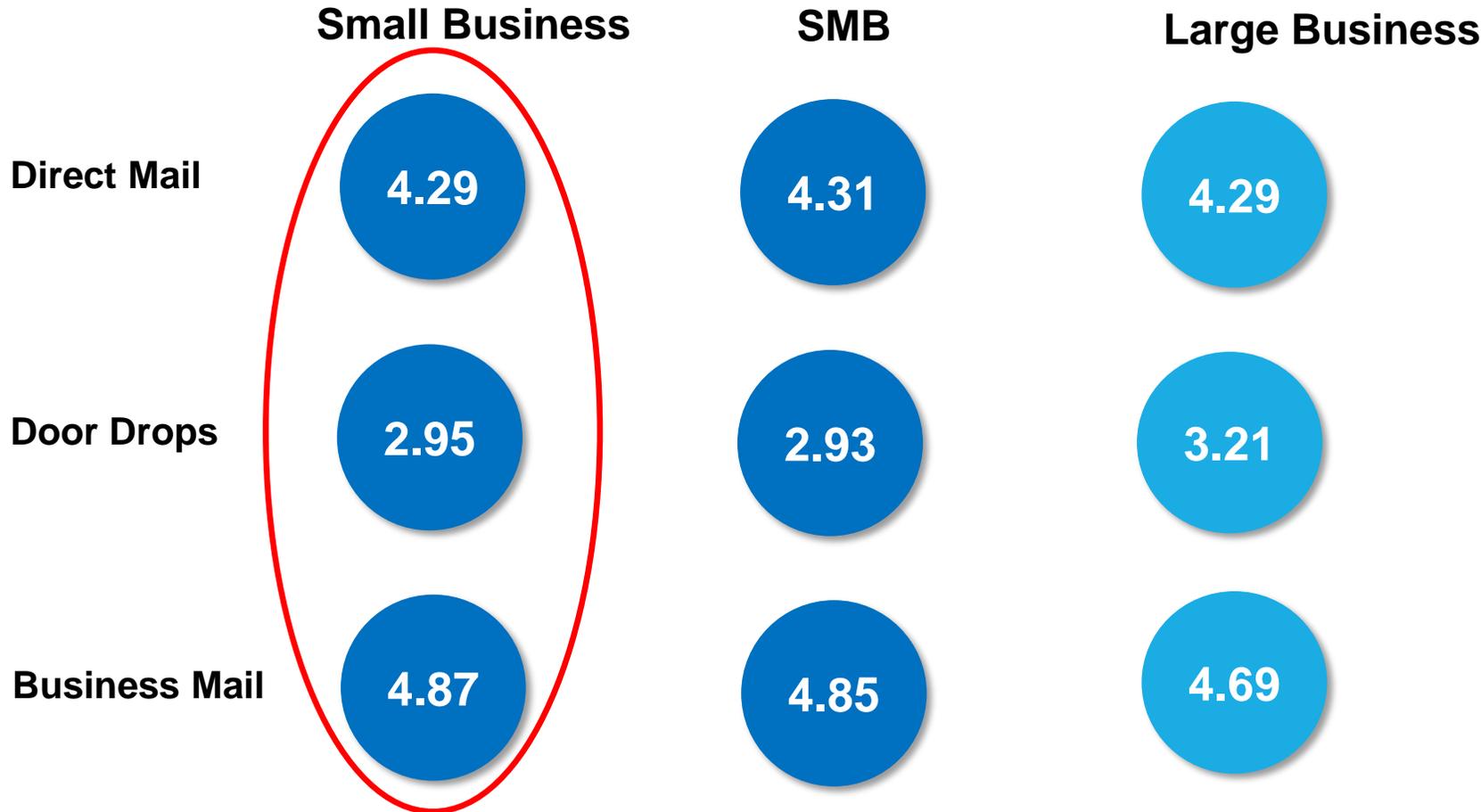
New B2B audience variables: business owners and freelancers display higher mail engagement rates

Frequency of mail interaction



Small Business employees – on whom economic recovery will depend - show high engagement across all mail types

Frequency of mail interaction

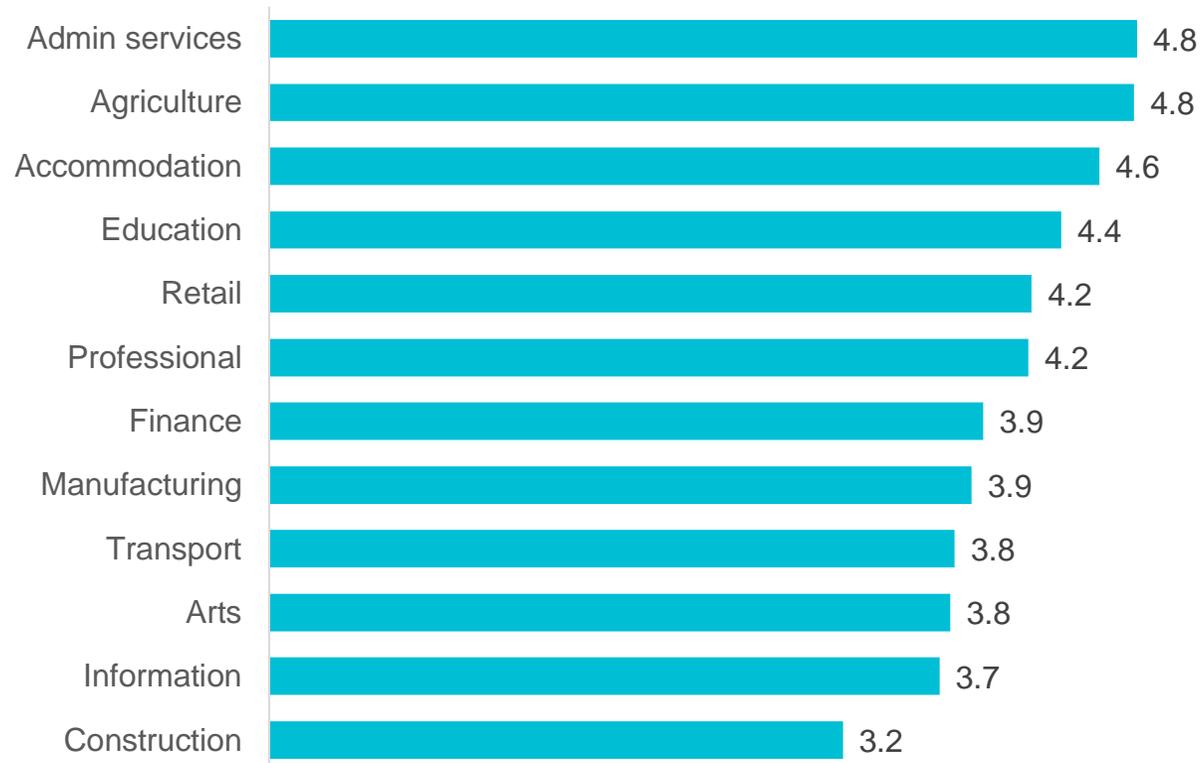


Source: JICMAIL Audience Data n=22,177 mail exposed Q2 2020 to Q1 2021
Small Business = 1-50 Employees. SMB = 1-250 employees. Large Business = 250+ employees

Data points now available to inform the targeting of different industry sector employees in the home

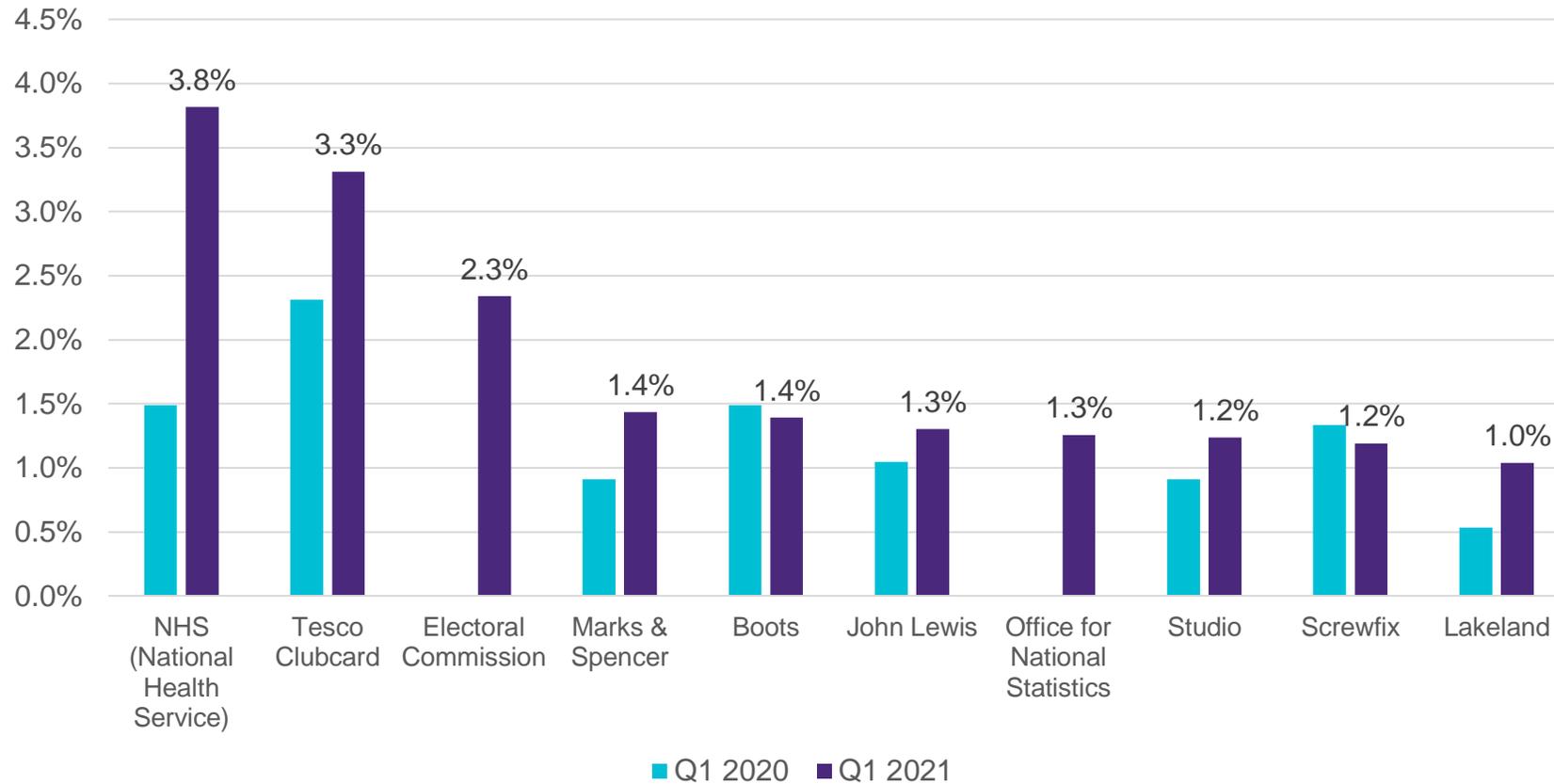
Frequency of mail interaction

Frequency by mail interaction industry employed in



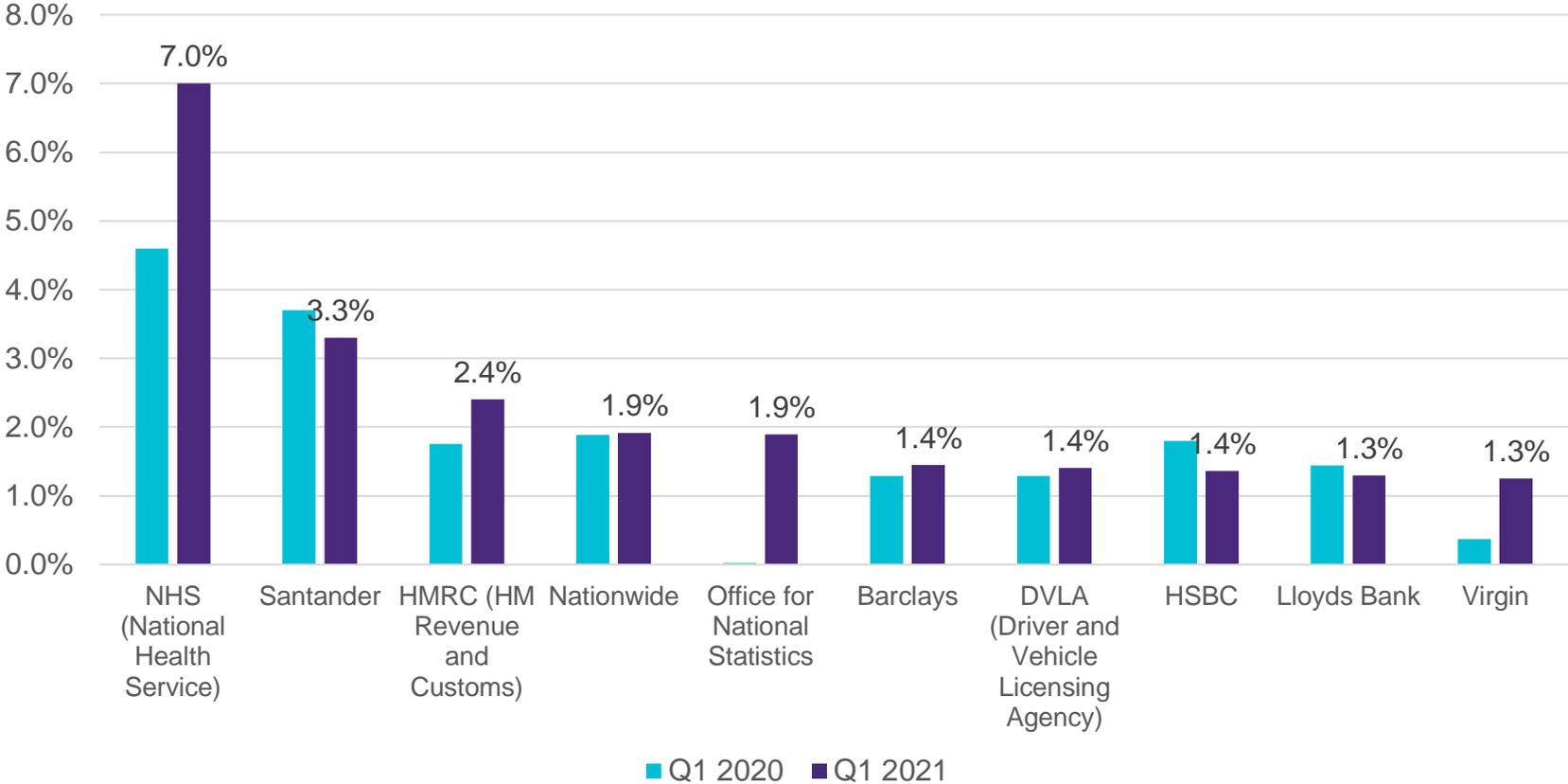
Retail and public sector dominate the top ten DM advertisers in Q1 2021

Share of Voice (% of DM items)
Q1 2021 vs Q1 2020



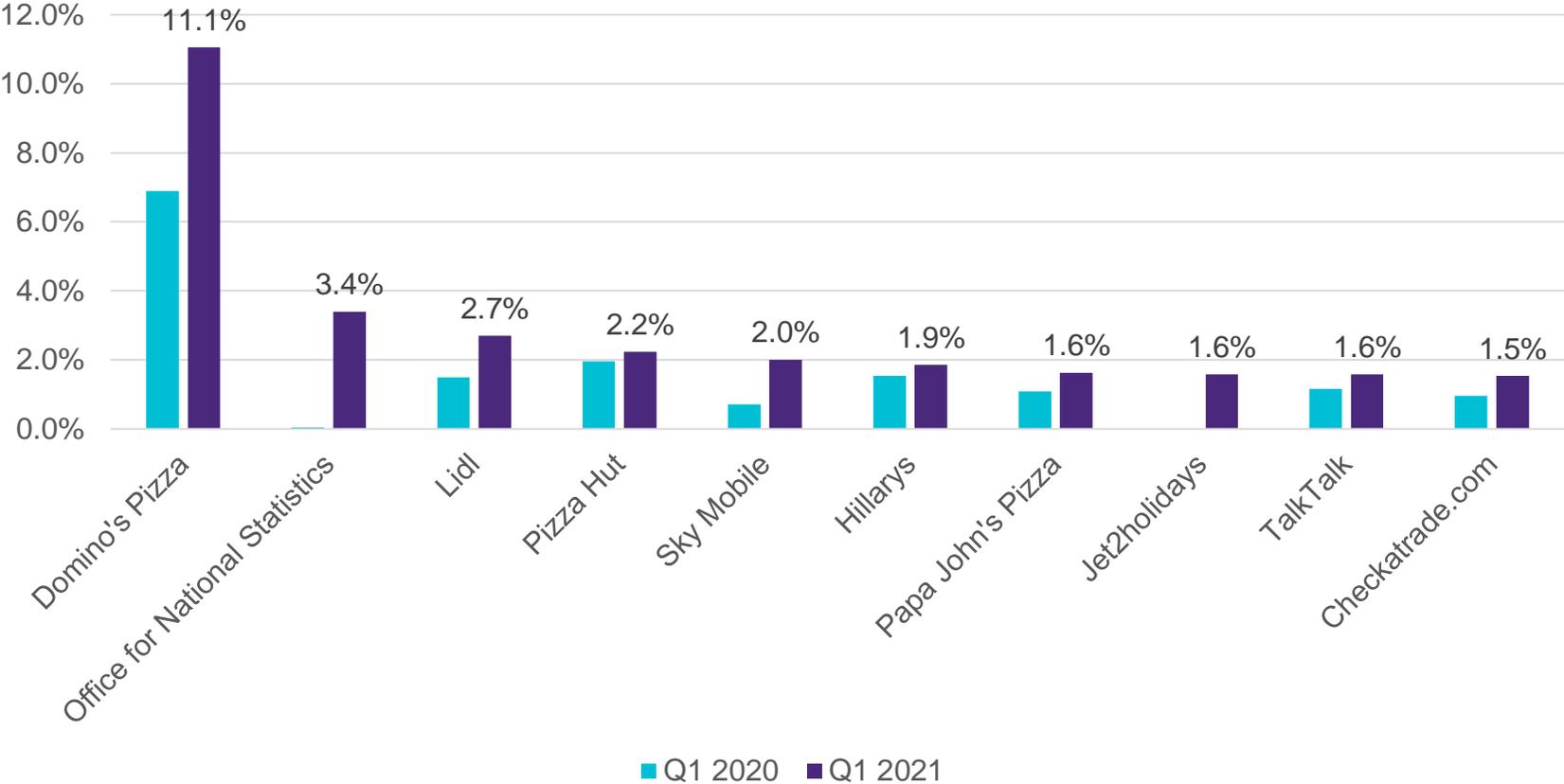
Finance and public sector dominate the Business Mail rankings

Share of Voice (% of Business Mail items)
Q1 2021 vs Q1 2020

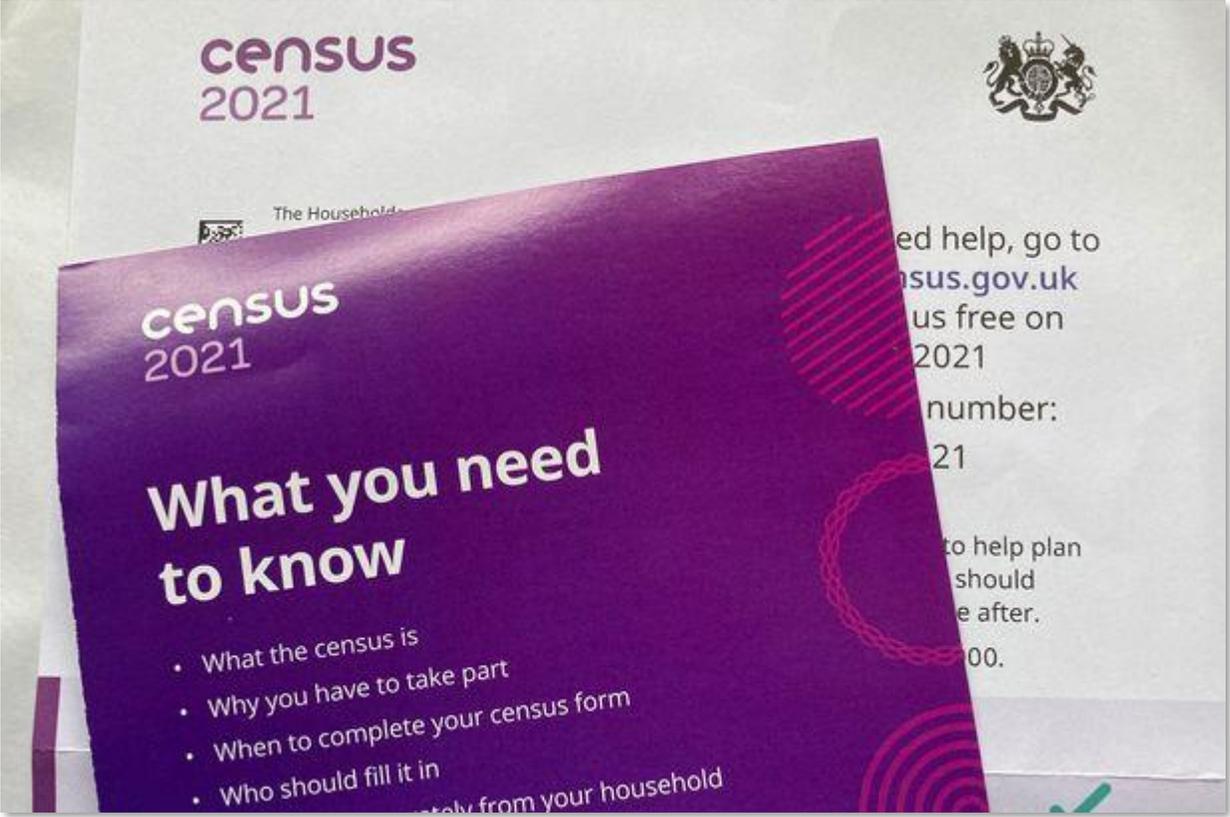


ONS census door drop activity recorded in Q1 2021

Share of Voice (% of Door Drop items)
Q1 2021 vs Q1 2020



ONS mail was more likely to be shared and kept in the home longer than the sector average in Q1



	ONS Q1	Government DM Q1
FREQUENCY (interactions)	4.25	4.86
ITEM REACH (people)	1.18	1.15
LIFESPAN (days)	10.1	9.7

What happened during Q1 2021?

1

Mail volumes returned to year on year growth for the first time since the start of the pandemic.

2

Increased mail volumes in the home have resulted in marginal declines in mail reach and frequency, although the two year trend is positive, indicating long term changes in mail behaviours.

3

Mail effectiveness continues to grow however – particularly in terms of driving digital effects. Up to 40% growth in digital effects seen year on year.

Thanks

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Mail Media Metrics