

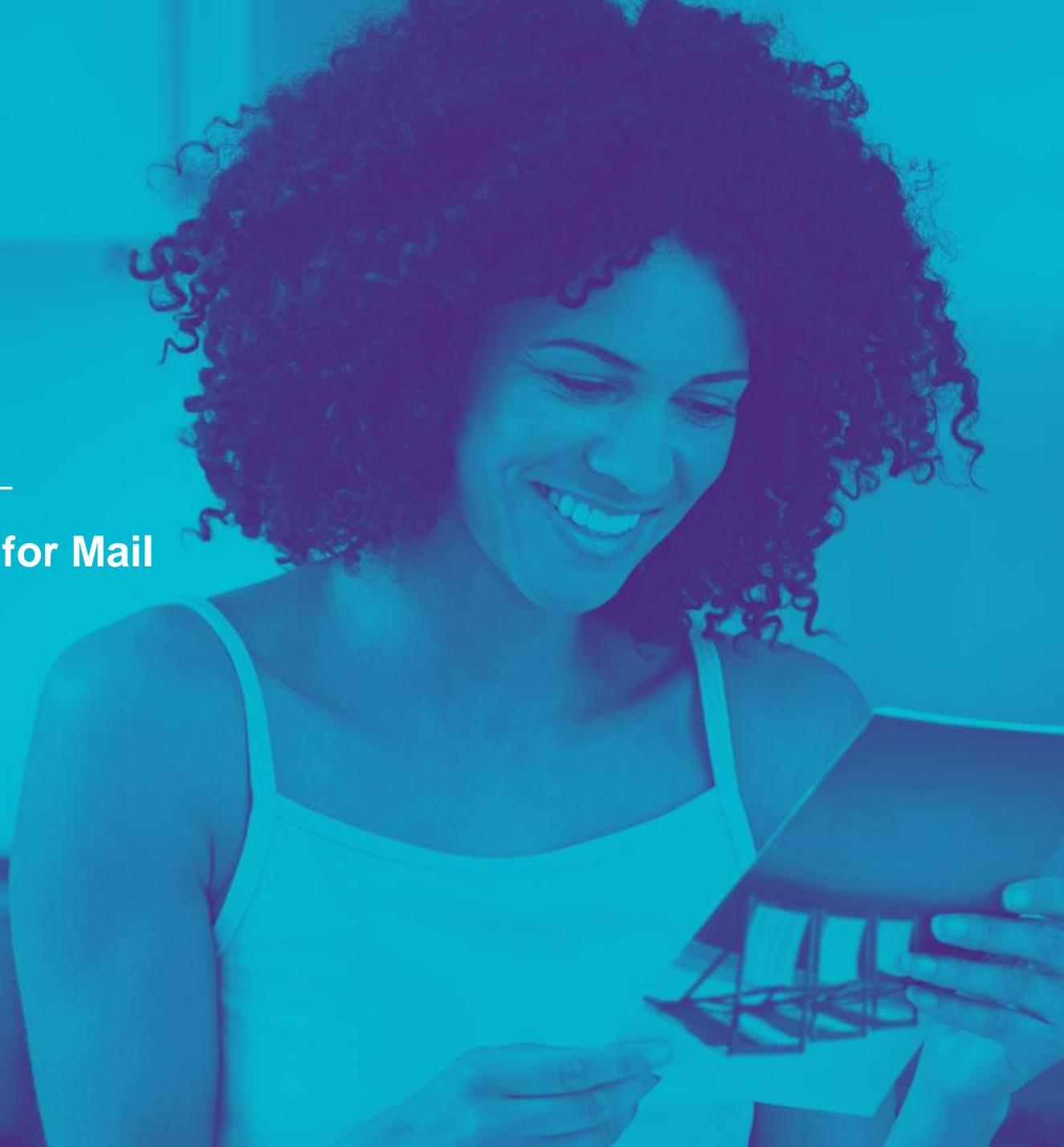
JICMAIL Q2 2021 Webinar

Introducing Unrivalled Competitor Insights for Mail

September 2021

**JIC
MAIL**

Mail Media Metrics



Shoppers are returning to the high street

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Business

Online retail sales slip in June as shoppers return to high street

The IMRG Capgemini online retail index for June revealed a 14.1% slump in online sales for the month, against the same period last year.

Henry Saker-Clark | Tuesday 13 July 2021 16:56    



Understanding the drivers of footfall is more important than ever



joshua 
@joshcharles_21



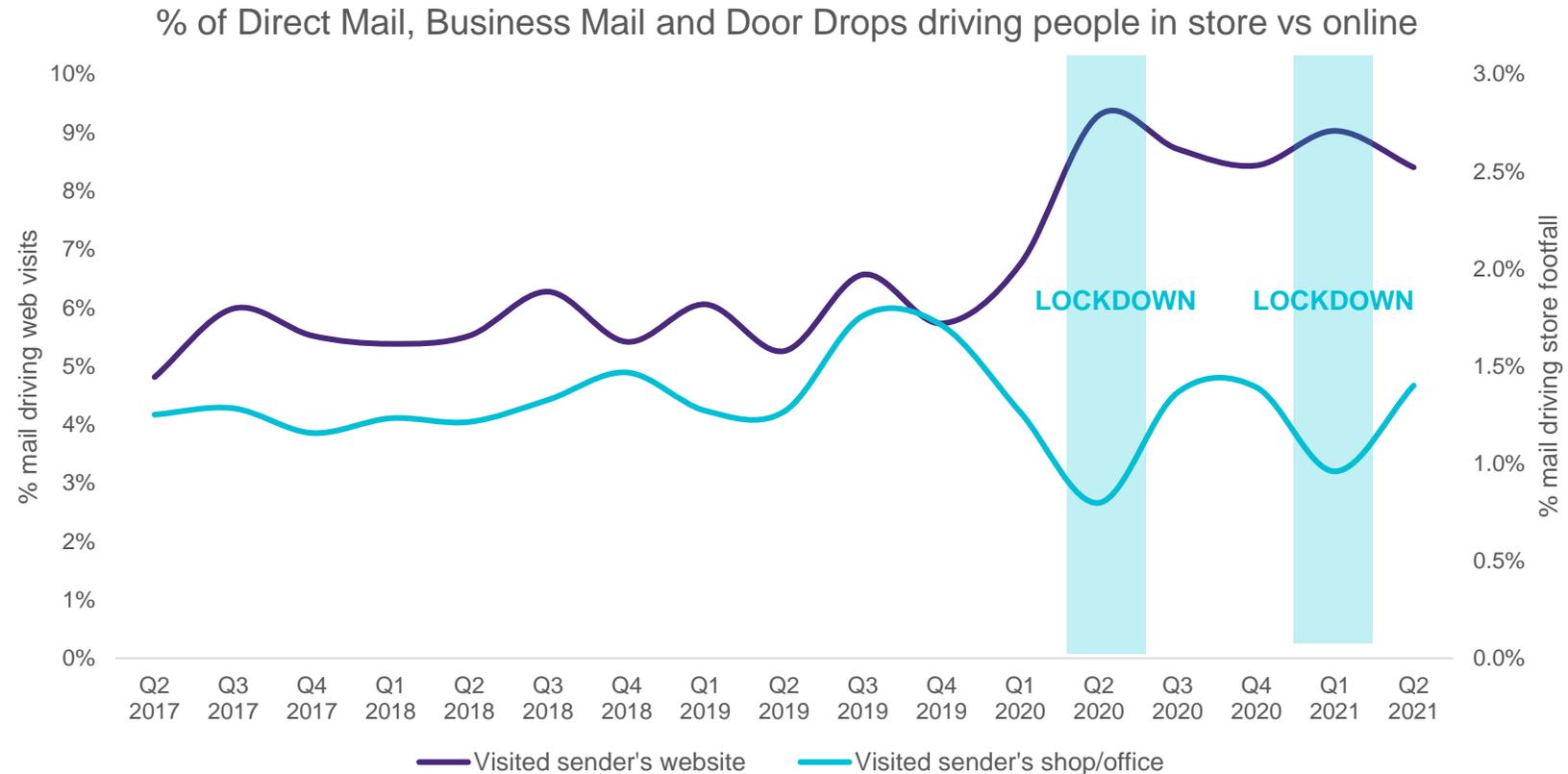
you cannot tell me the Marble Arch mound doesn't look like the first level in mario 64



9:30 am · 27 Jul 2021 · Twitter for iPhone

© Twitter/ Joshcharles

Mail plays a crucial role in driving store footfall



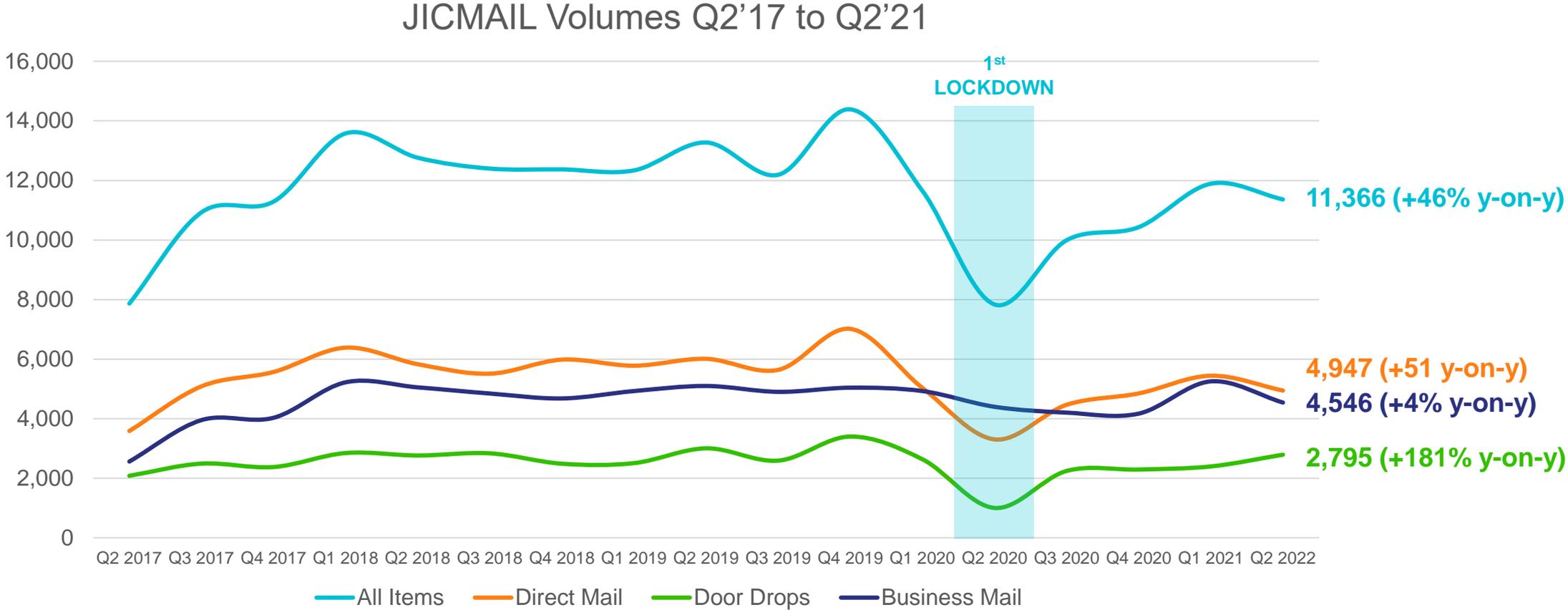
First, a look at Key Mail Media Metrics

Q2 2021



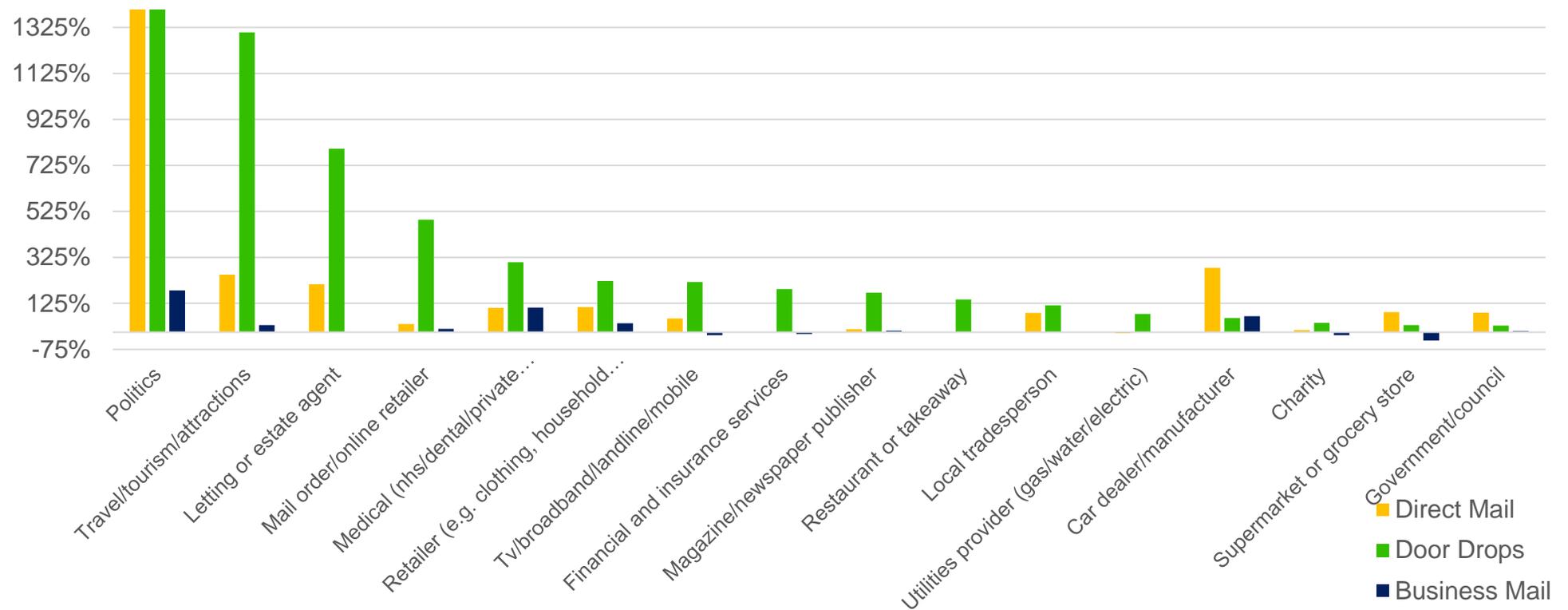
Mail Media Metrics

Strong year-on-year growth volume growth rates vs a weak Q2 2020

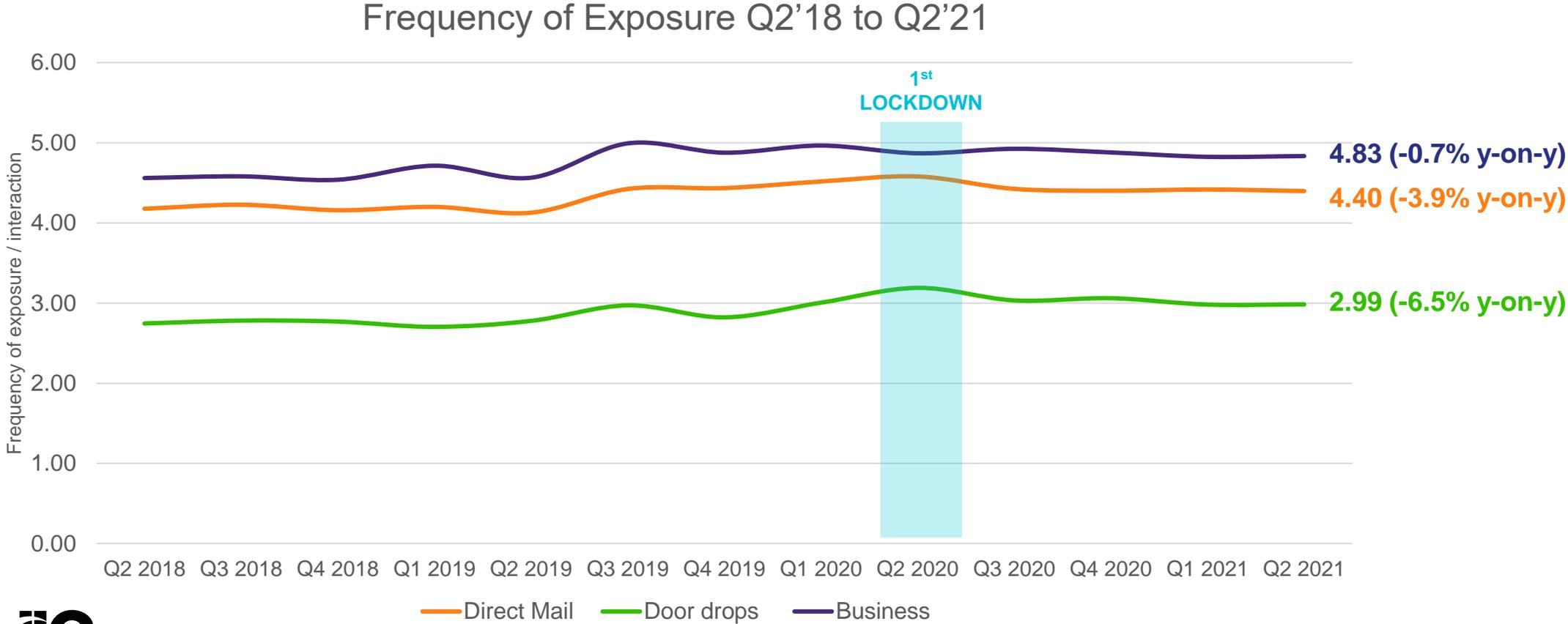


A rebound in travel, mail order / online retail and medical mail drove Q2 volume growth. Local elections also played a big part.

Q2 '21 year on year volume changes by category



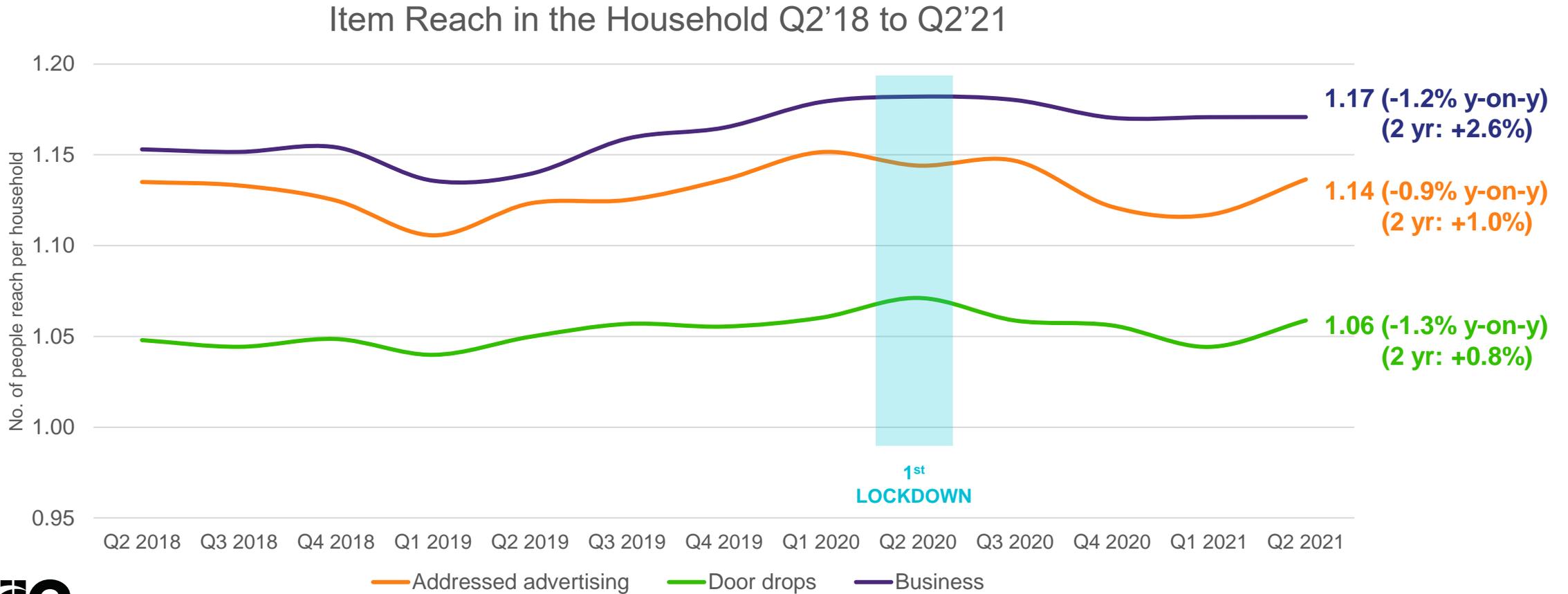
Frequency of interaction has taken a slight dip vs a record breaking quarter for mail interaction a year ago during the first lockdown



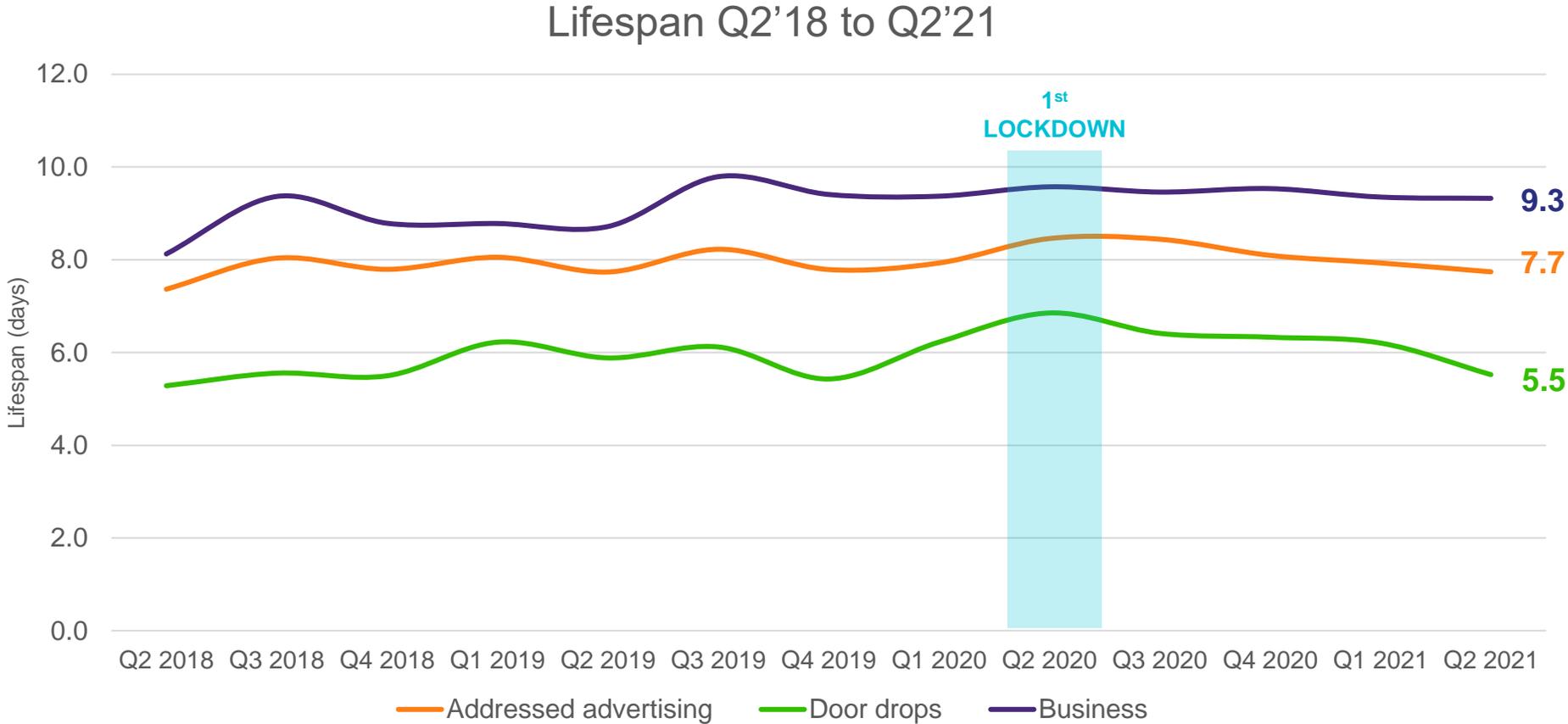
However, again there is evidence of long term mail behaviour changes with growth in frequency seen over a two year time frame

Q2 2021 Frequency	Year-on-Year Growth	Two Year Growth Rate
Direct Mail	-3.9%	+6.5%
Business Mail	-0.7%	+5.9%
Door Drops	-6.5%	+7.5%

Item reach records a strong two year trend



DM live in the home for over a week on average

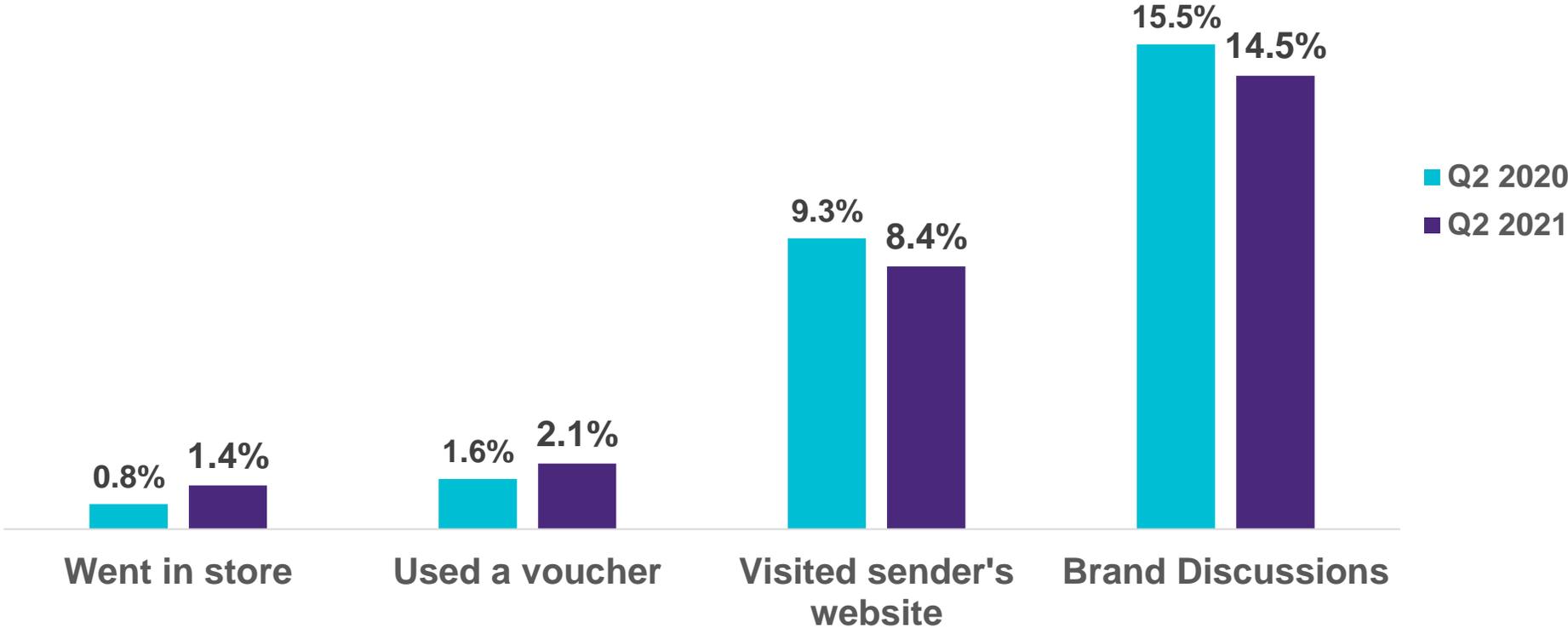


Mail Effectiveness Update

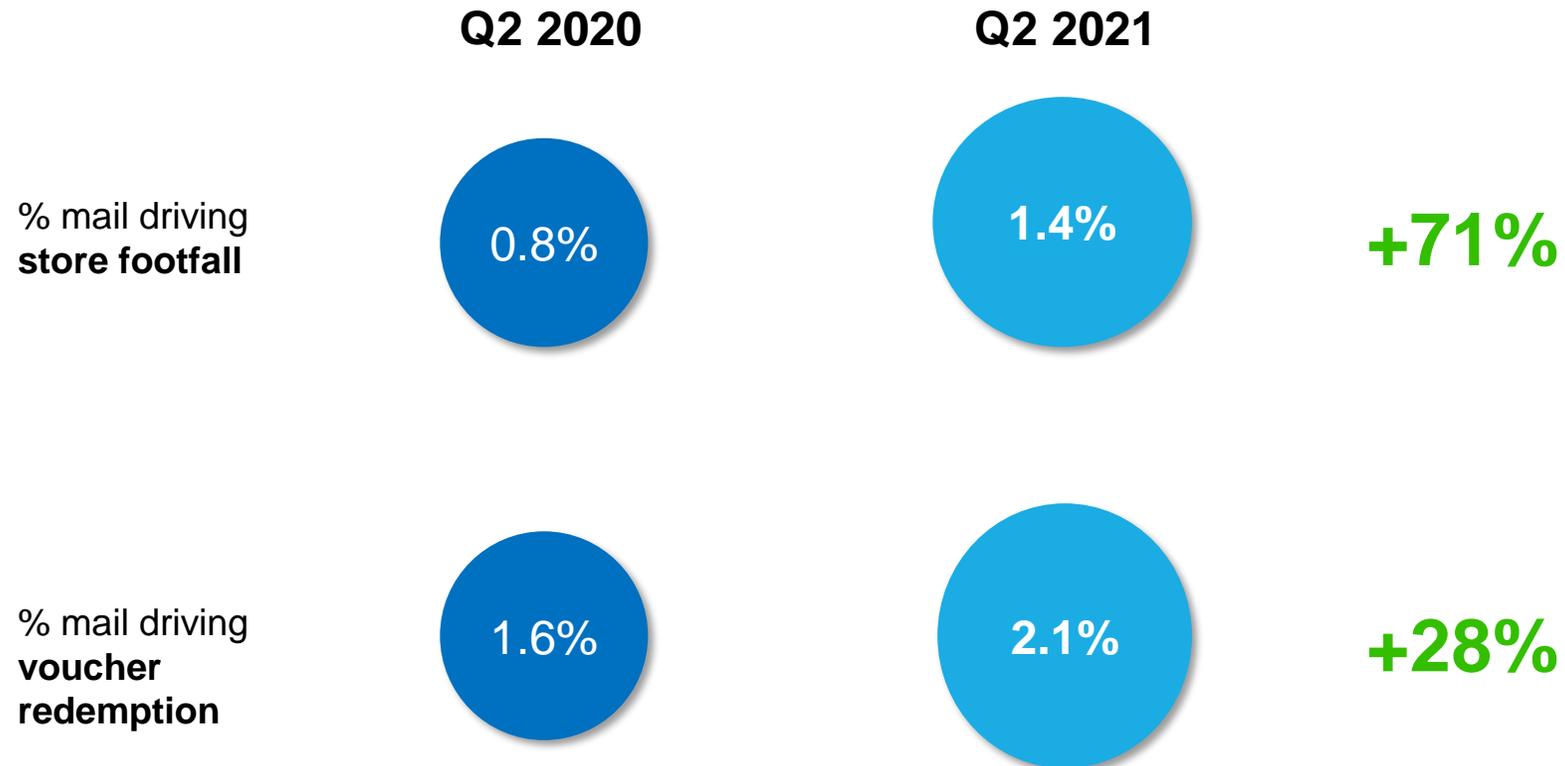
Q2 2021

While some metrics have struggled to reach the high benchmarks set in Q2 2021, store footfall and voucher redemption effects have increased

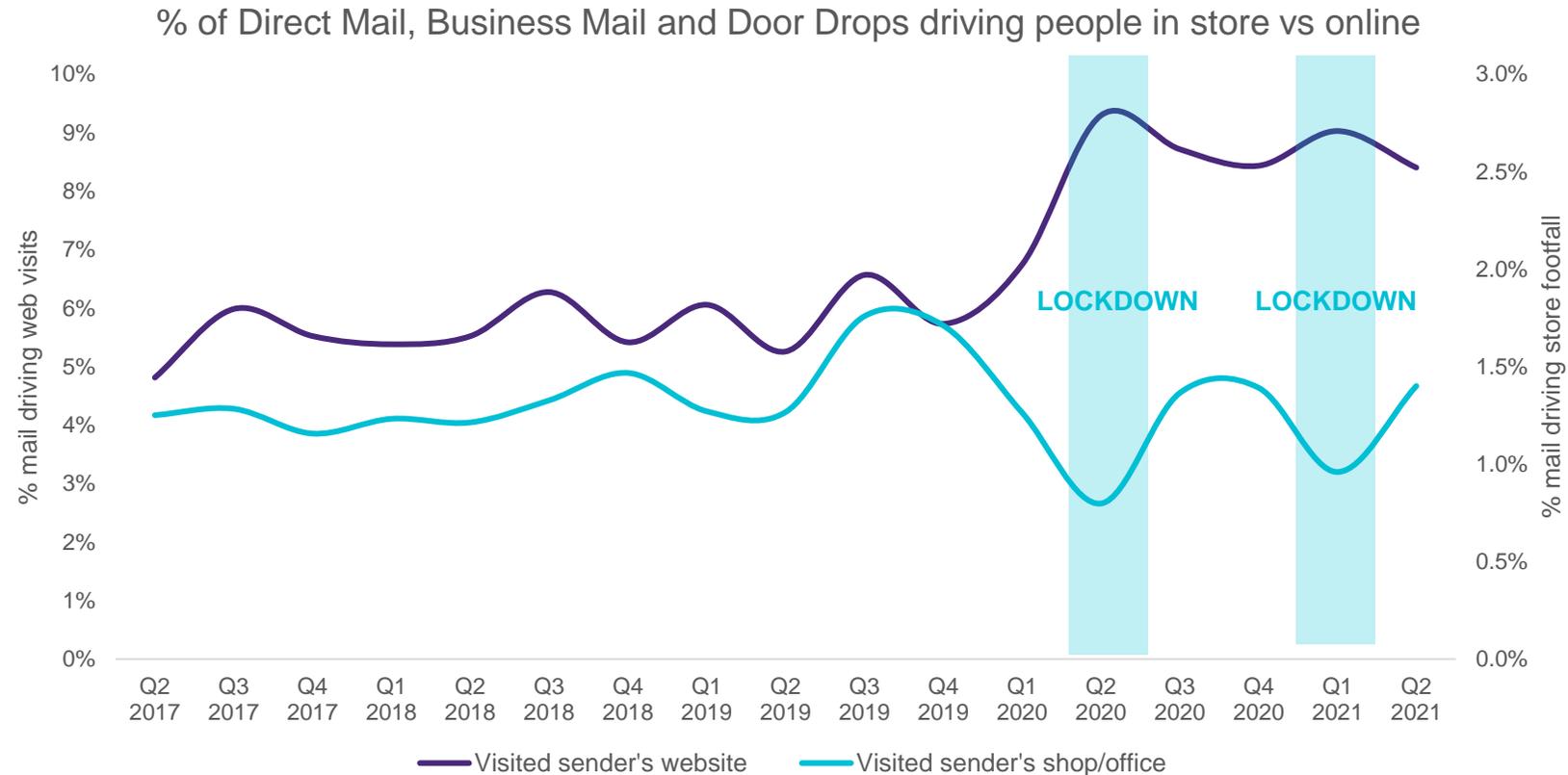
Mail Commercial Actions (All Mail Types) % of mail items



As lockdown restrictions eased, mail played a crucial role in driving consumers in store in Q2



The new normal: digital effects nearly x 6 greater than footfall effects



Advertiser activity

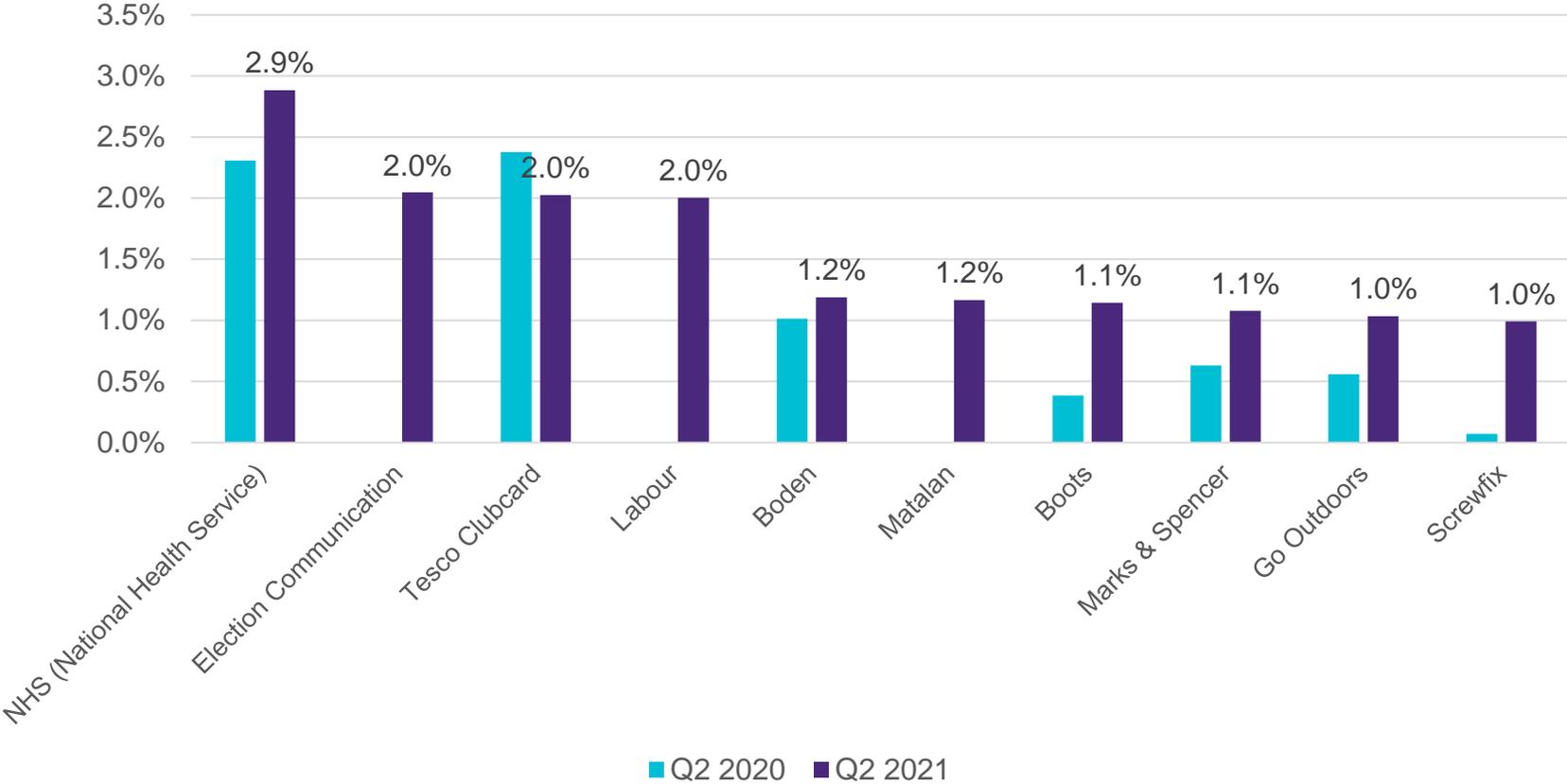
Q2 2021



Mail Media Metrics

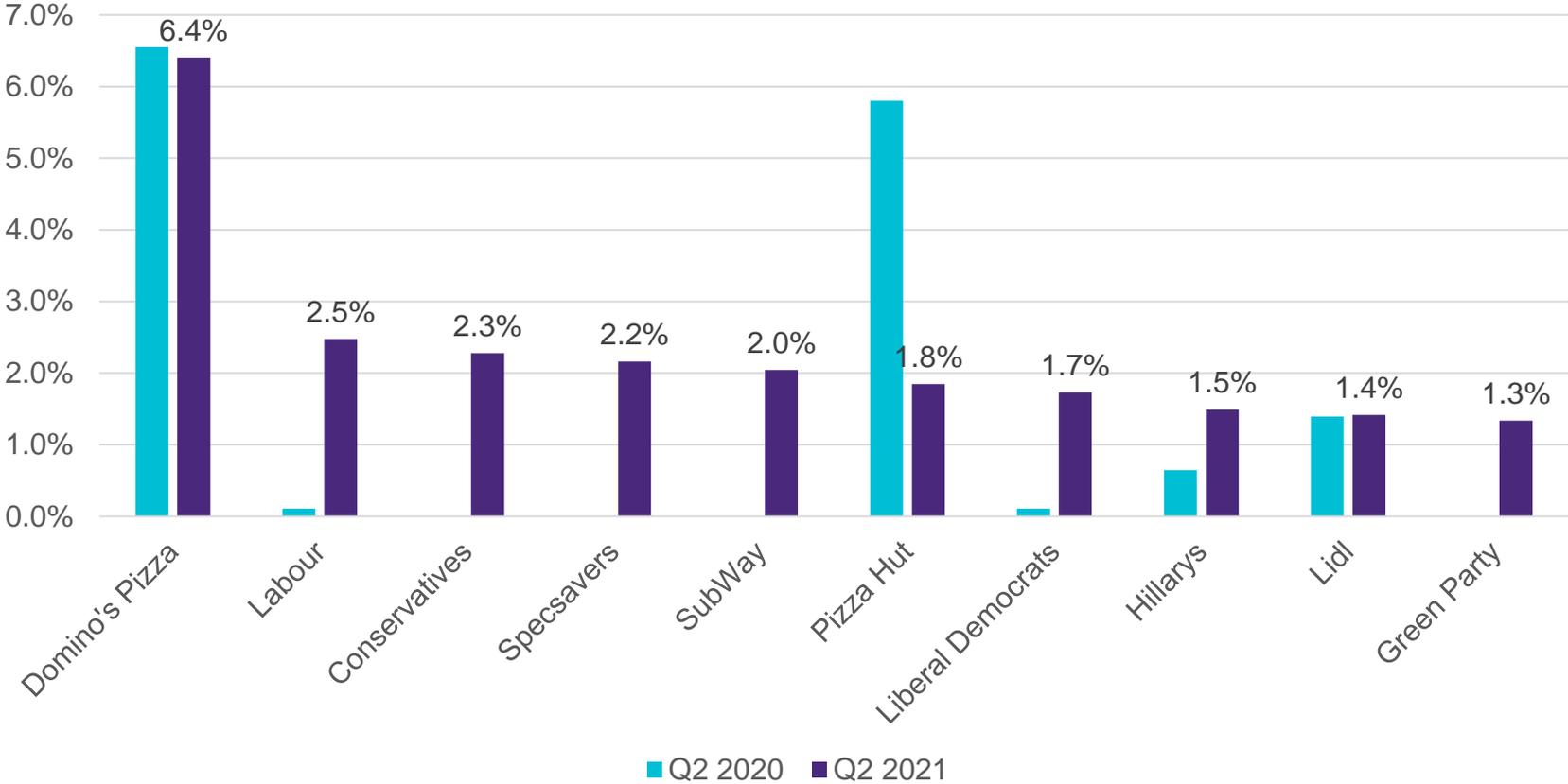
Local elections prompted increased Election Communication and Labour Party Direct Mail. The NHS and retailers dominate the rest of the top 10

Share of Door Mat (% of DM items)
Q2 2021 vs Q2 2020



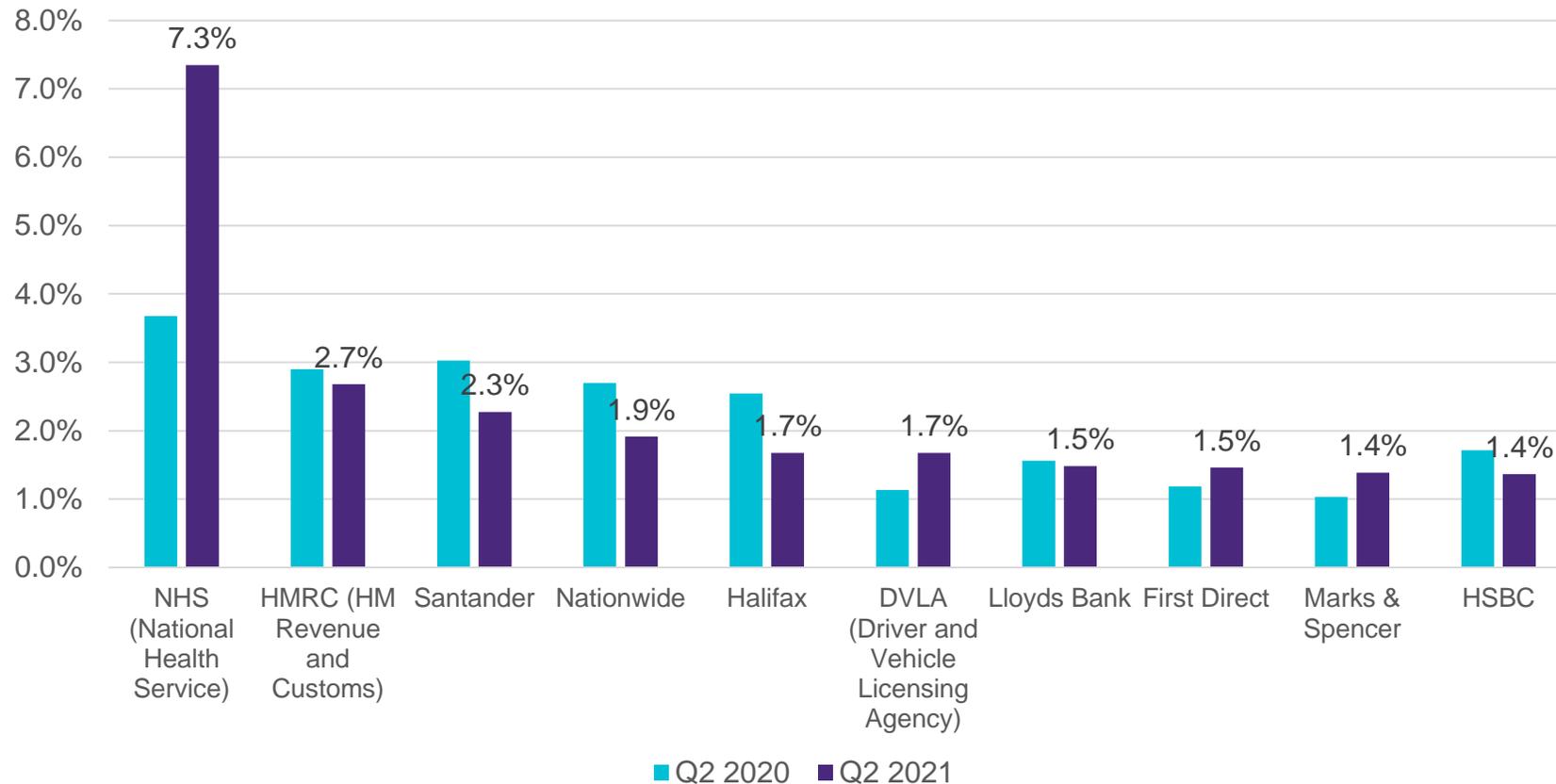
The local election effect: Politics, pizza and retail dominate the Door Drop rankings

Share of Door Mat (% of Door Drop items)
Q2 2021 vs Q2 2020



Government and finance dominate the business mail rankings. NHS takes over 7% of share

Share of Door Mat (% of Business Mail items)
Q2 2021 vs Q2 2020



Unlock unrivalled competitor insight with new JICMAIL Discovery competitive insight tools!



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Report Type

- Share of Door Mat
- Frequency Comparison
- Item Reach Comparison
- Lifespan Comparison
- Audience Profile
- Performance by Audience
- Items by Actions
- Key Actions

Select Advertiser Brands or choose an advertiser sector

Clear All

Advertiser Brand

Marks & Spencer ALL COMBINED Tesco ALL COMBINED Co-Op ALL COMBINED

Advertiser Sector

ALL

Select Time Frame

Single Year

Select Period

2021

Select Mail Type

All

Select Mail Content

All

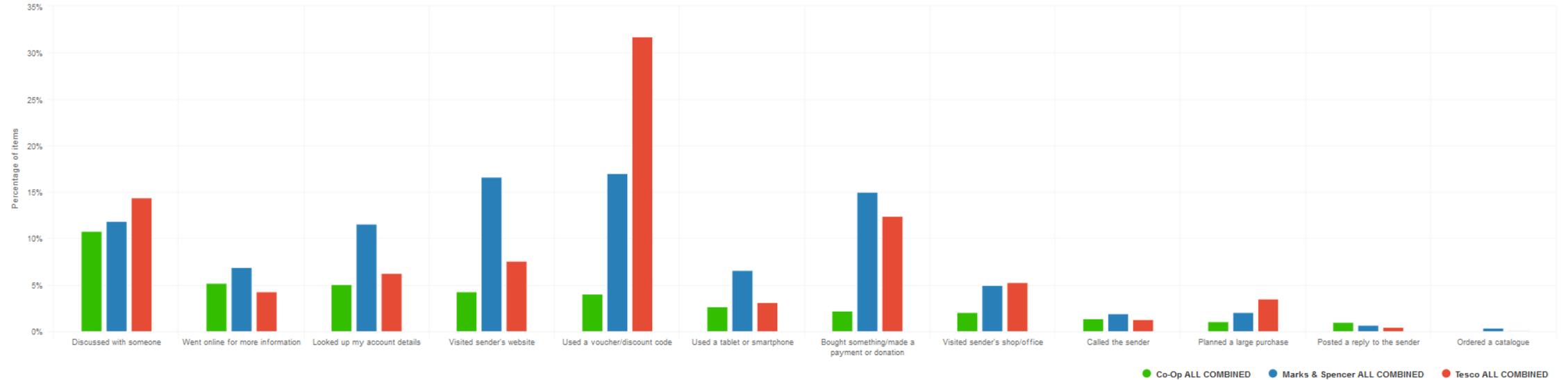
Physical Actions Taken on Mail (%) Commercial Actions Taken with Mail (%)



Items by Actions - 2021

Mail Type: All - Mail Content: All

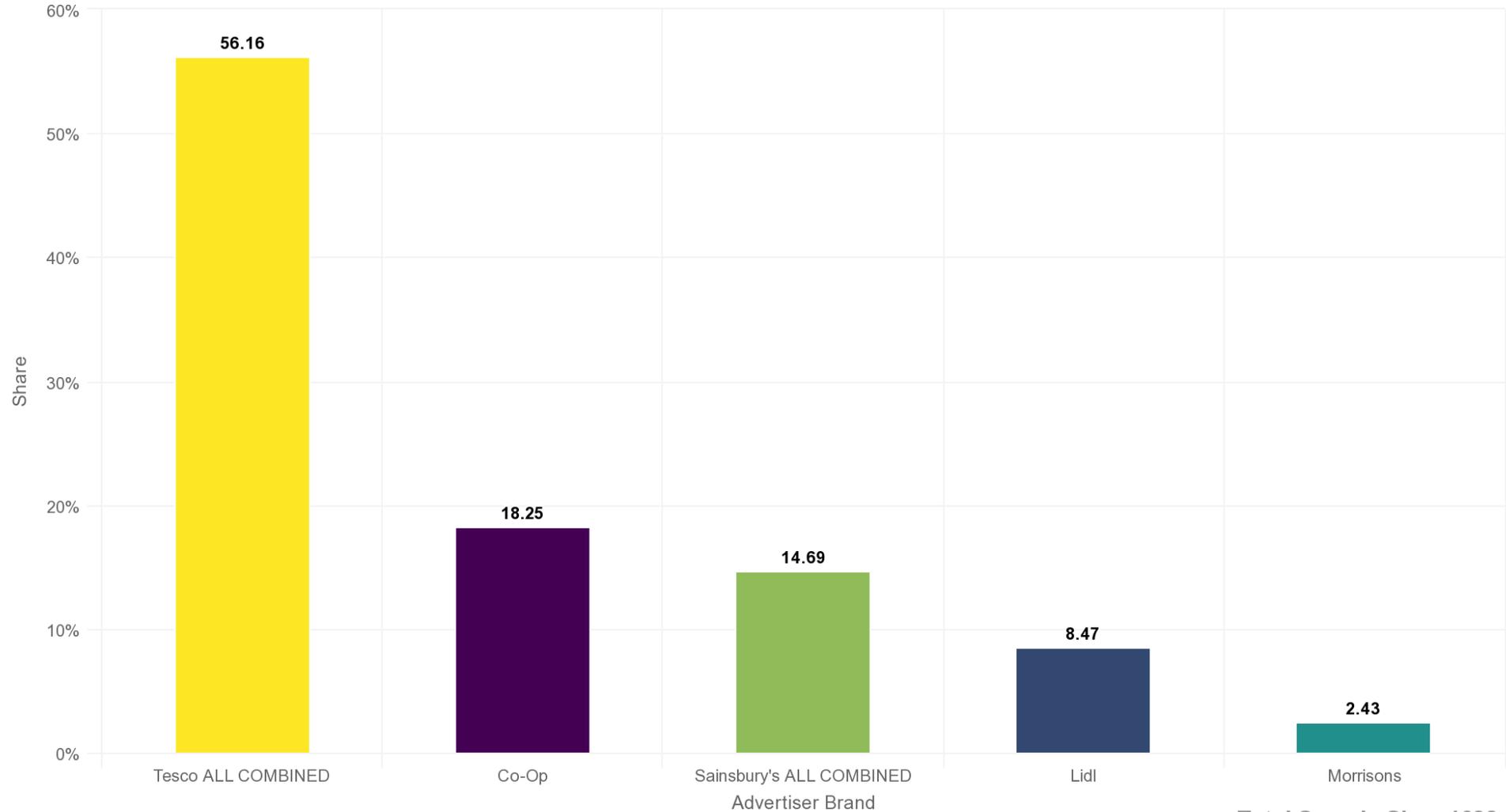
Download



Measure your share of doormat vs a custom competitor set

Share of Door Mat - 2020

Mail Type: All - Mail Content: All

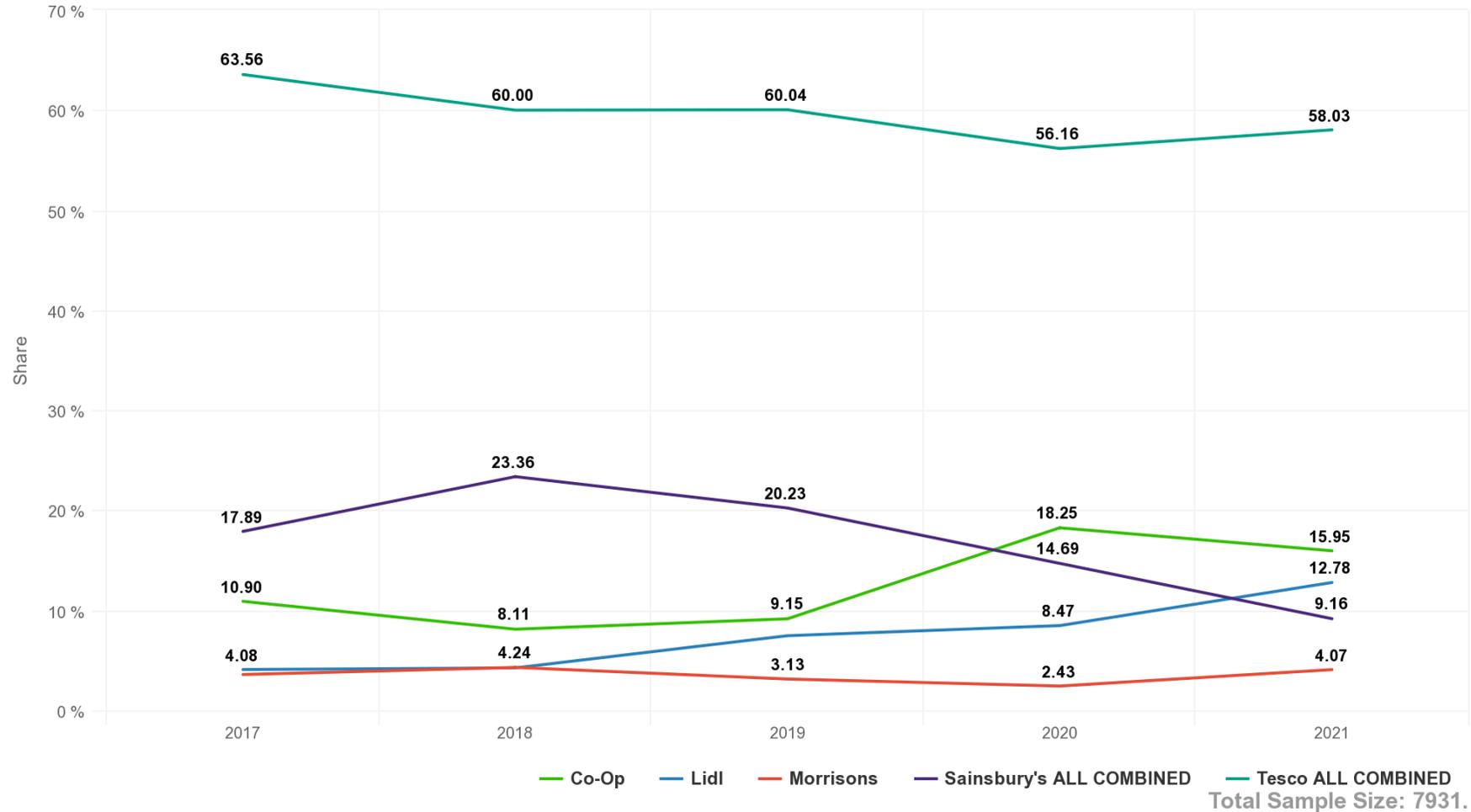


Total Sample Size: 1688.

Track share of door mat over time

Share of Door Mat 2017 - 2021

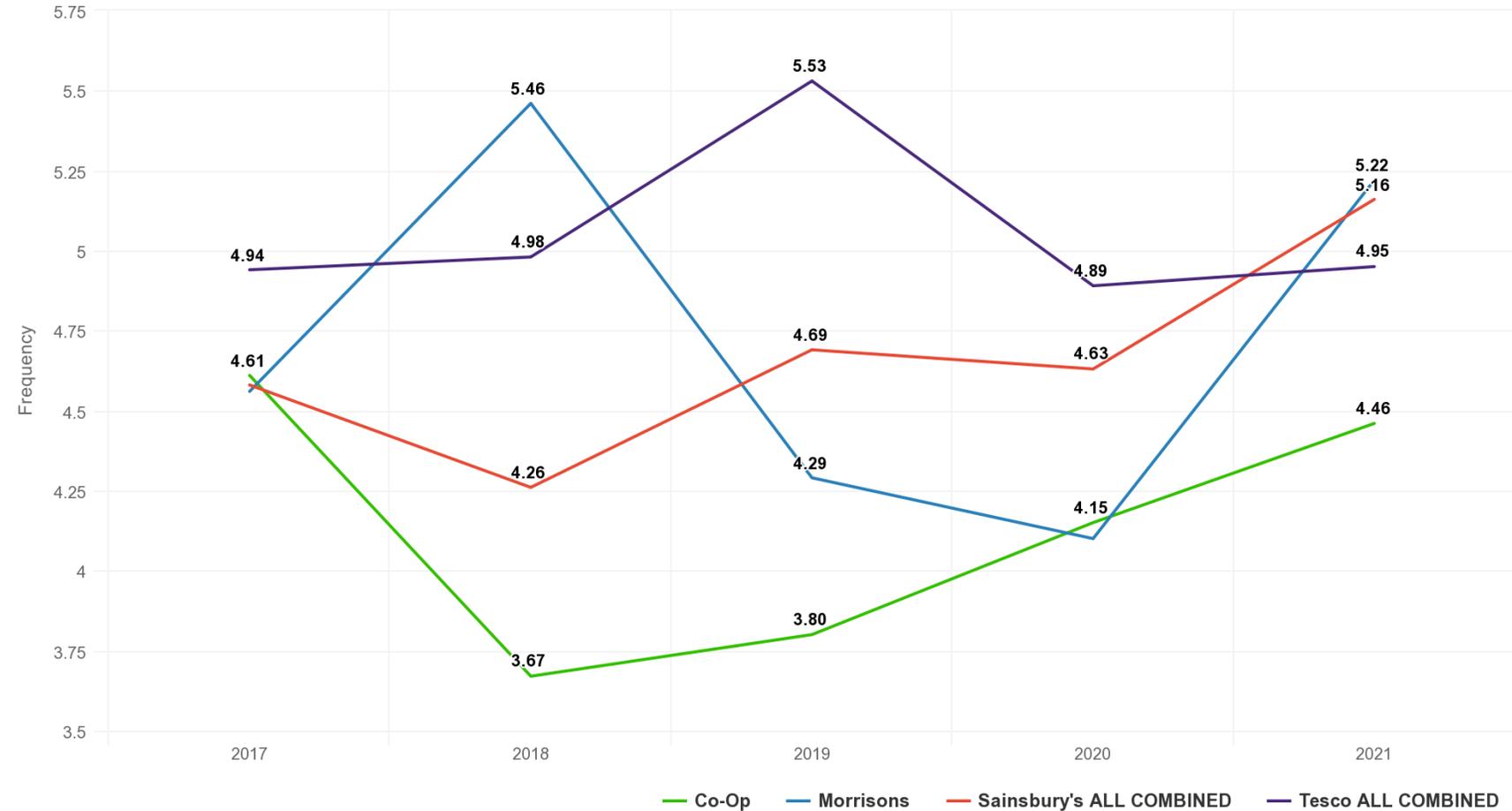
Mail Type - All | Mail Content - All



Track mail performance over time

Frequency Comparison 2017 - 2021

Mail Type - All | Mail Content - All

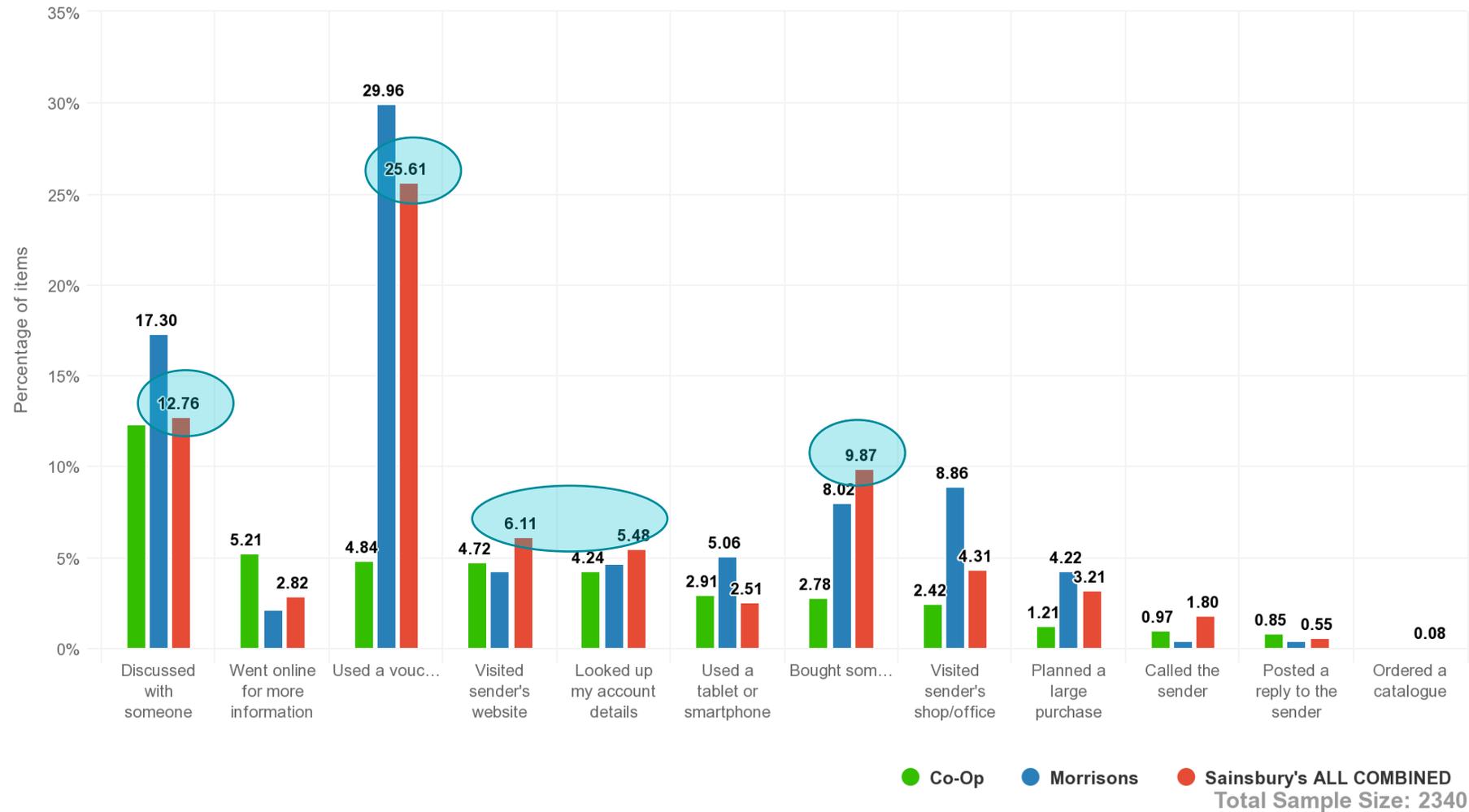


Total Sample Size: 7385. Showing only advertiser brands with total sample size > 30 items

Compare mail effectiveness

Items by Actions - 2017 - 2021

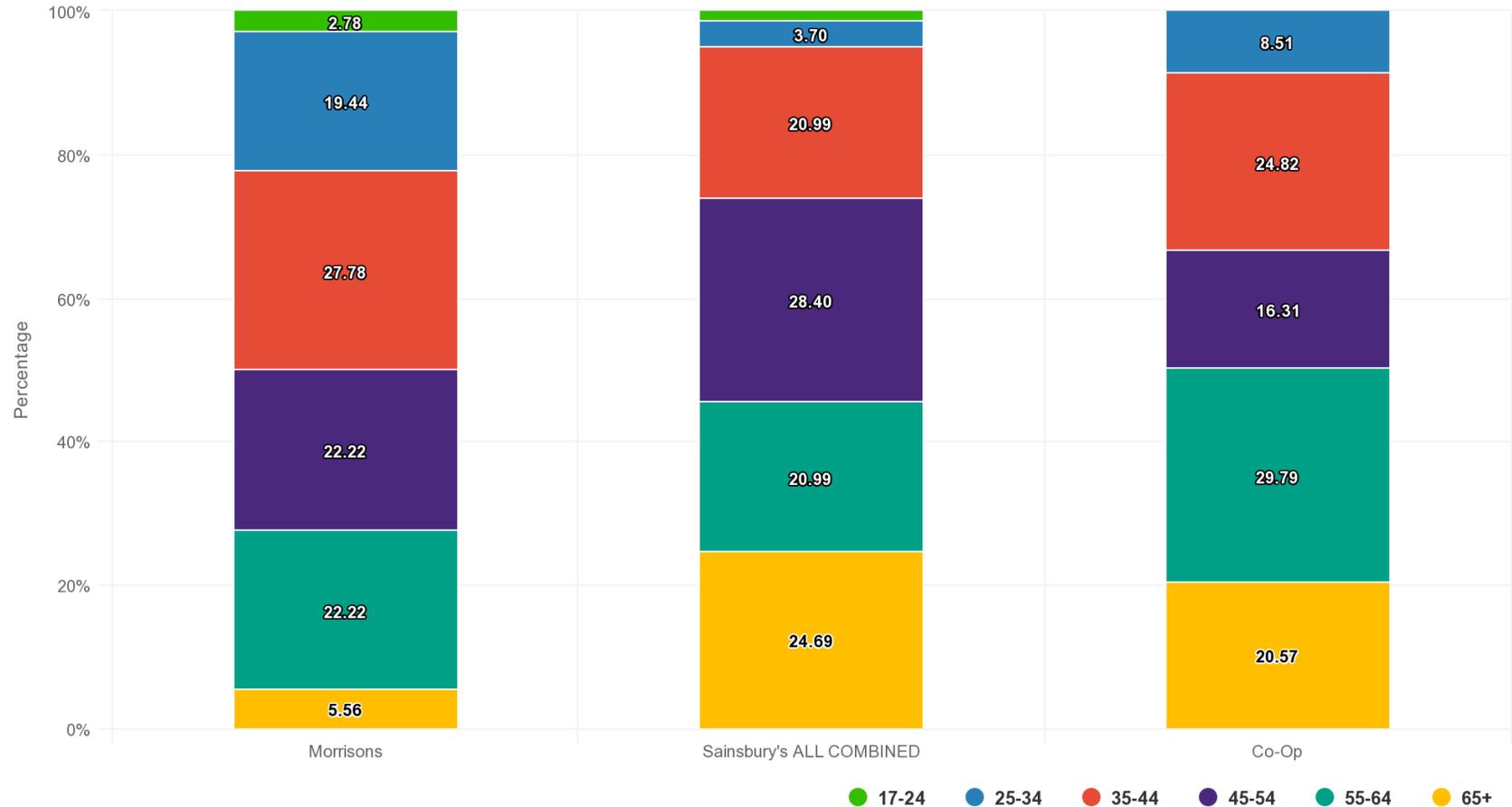
Mail Type: All - Mail Content: All



Who are your competitors targeting?

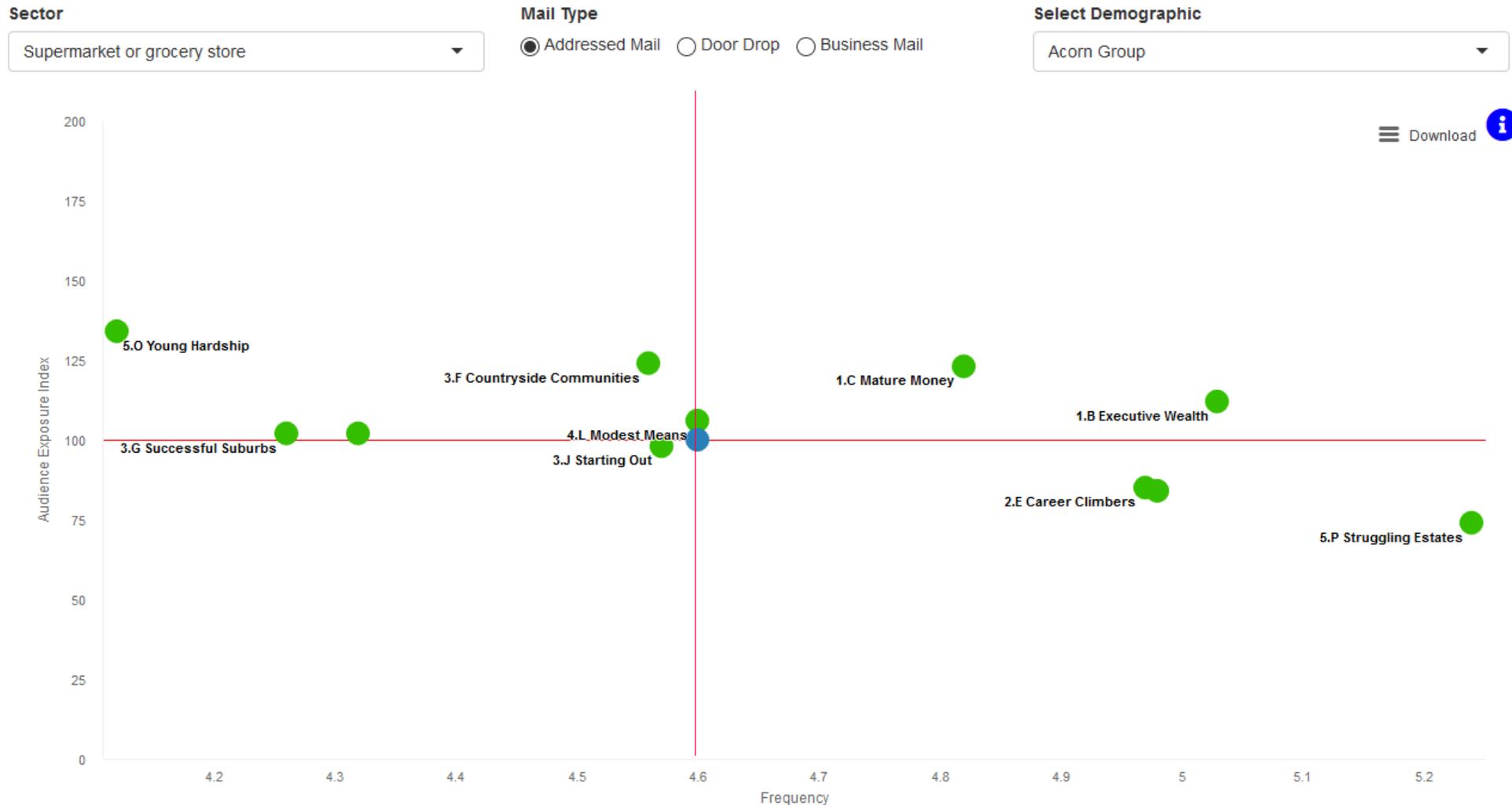
Audience Profile - 2021

Mail Type- All | Mail Content- All | Demographic Group - Age



Total Sample Size: 258. Showing only advertiser brands with total sample size > 30 items

Identify hidden audience opportunities

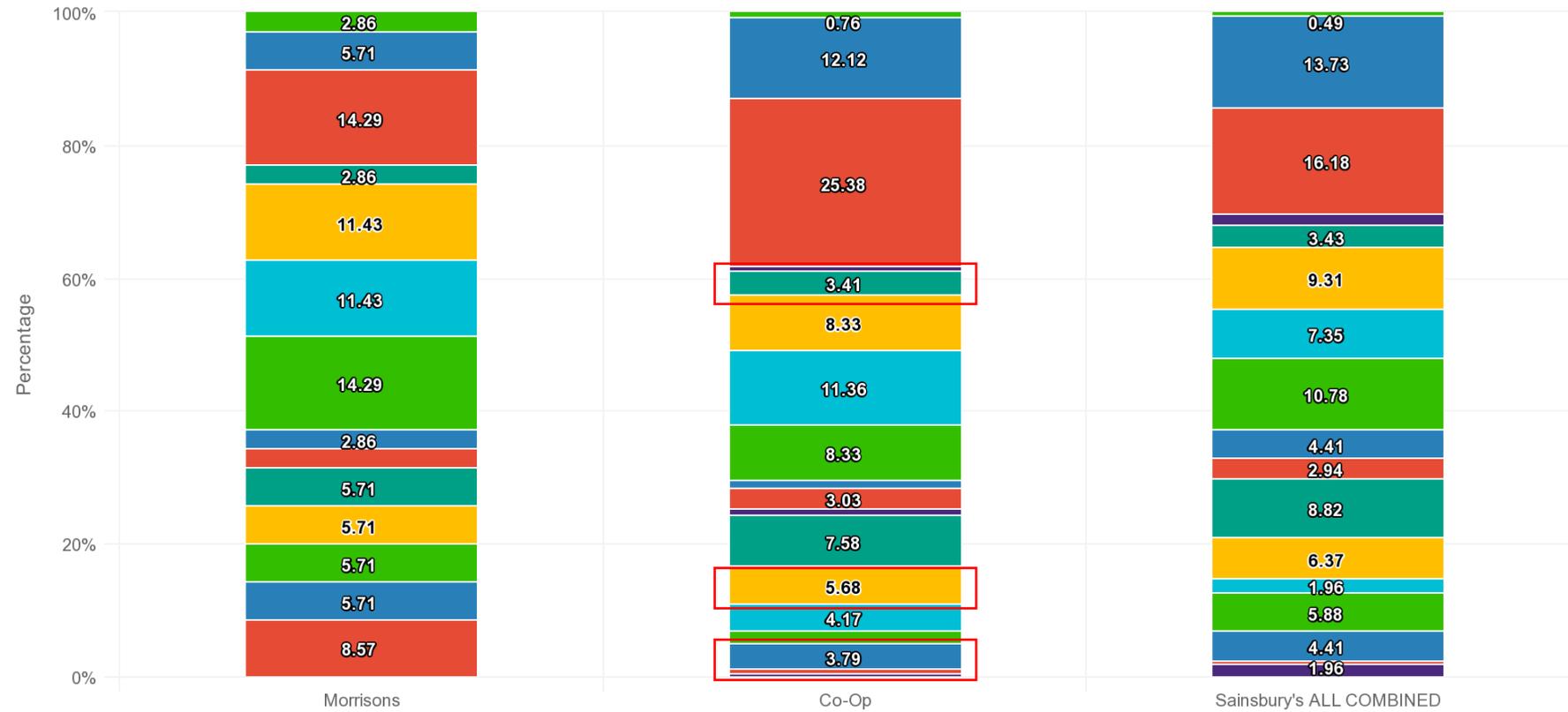


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Compare audience opportunities to competitor targets

Audience Profile - 2020

Mail Type- All | Mail Content- All | Demographic Group - Acorn group



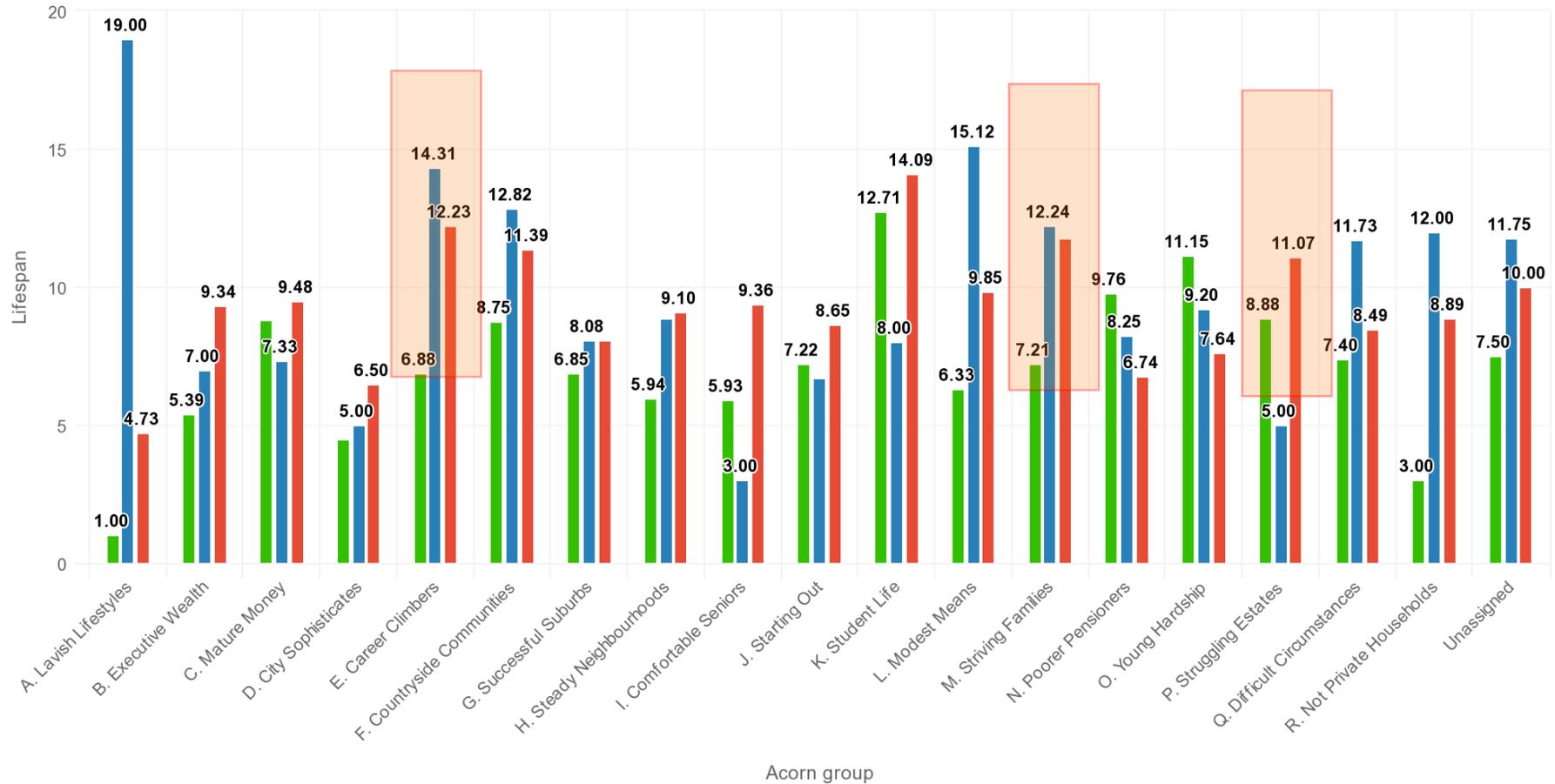
- A. Lavish Lifestyles
- B. Executive Wealth
- C. Mature Money
- D. City Sophisticates
- E. Career Climbers
- F. Countryside Communities
- G. Successful Suburbs
- H. Steady Neighbourhoods
- I. Comfortable Seniors
- J. Starting Out
- K. Student Life
- L. Modest Means
- M. Striving Families
- N. Poorer Pensioners
- O. Young Hardship
- P. Struggling Estates
- Q. Difficult Circumstances
- R. Not Private Households

Total Sample Size: 503. Showing only advertiser brands with total sample size > 30 items

Performance by audience

Performance by Audience 2017-07-03 - 2021-07-04

Mail Type - All | Mail Content - All | Demographic Group - Acorn group | Metric - Lifespan



What happened during Q2 2021?

1

With year-on-year comparisons being made with a pandemic baseline for the first time, volumes have increased nearly 50% year on year as the market rebounds.

2

Matching the record breaking levels of mail interaction and effectiveness recorded during the Q2 2020 lockdown is a hard task. Two year growth in mail reach and frequency points to long term mail behaviour change however.

3

With lockdown restrictions easing, mail played its part in driving consumers back in store. The footfall effects of mail increased by 71% year on year.

Thanks

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