

JICMAIL Q3 2021

Key Results

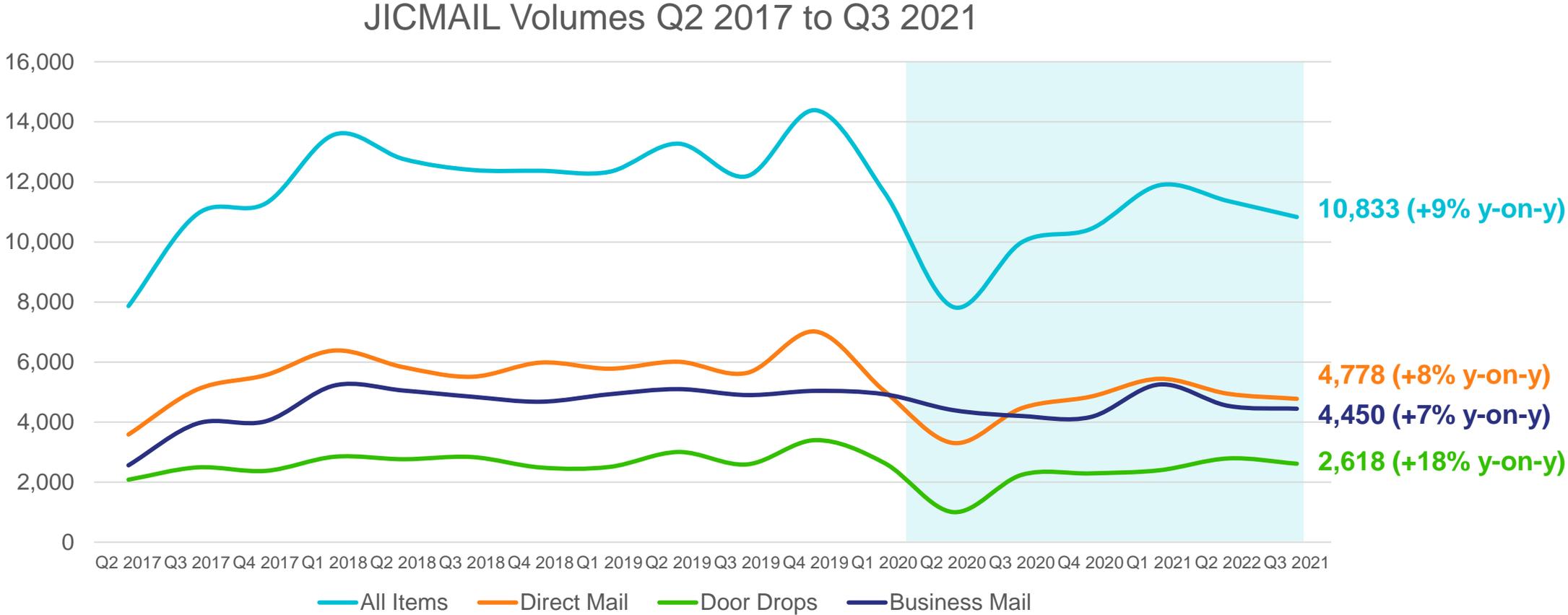
November 2021



Mail Media Metrics

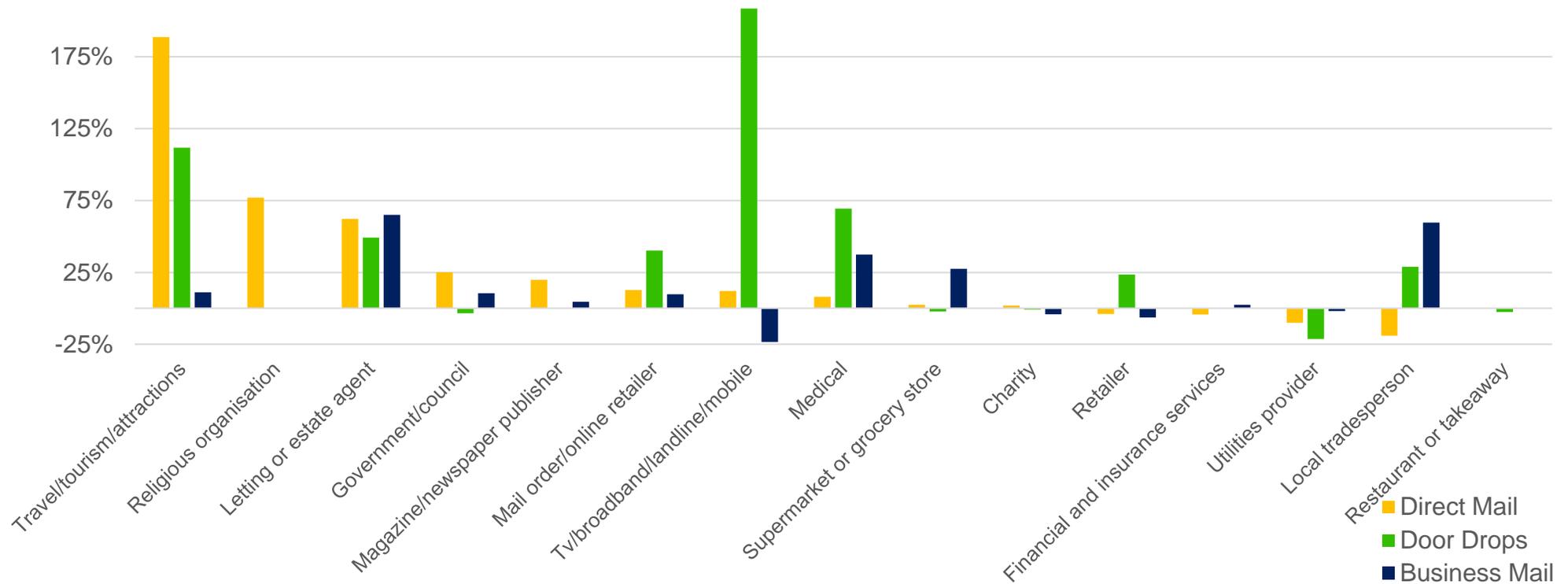


JICMAIL has now tracked over two hundred thousand mail journeys

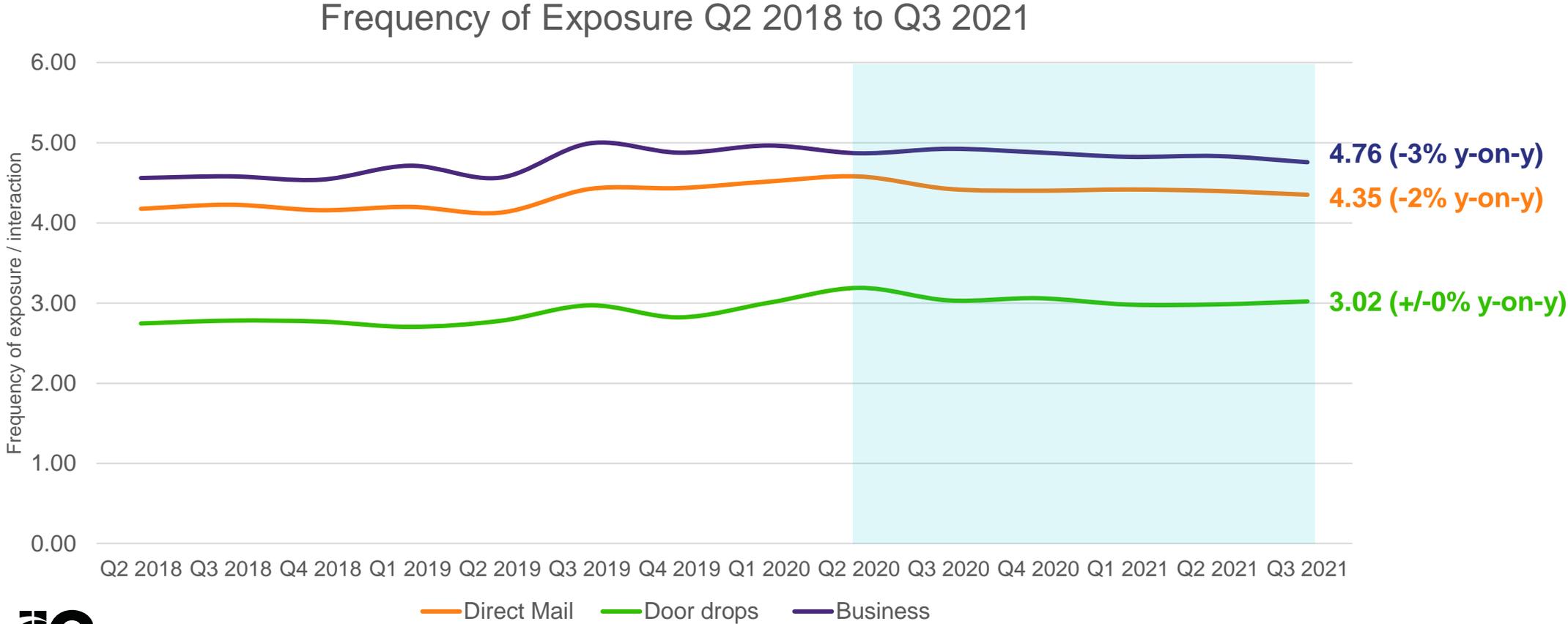


Summer holiday activity drove volume growth in the travel sector. TV / Broadband volumes prompted a Door Drop uptick year on year

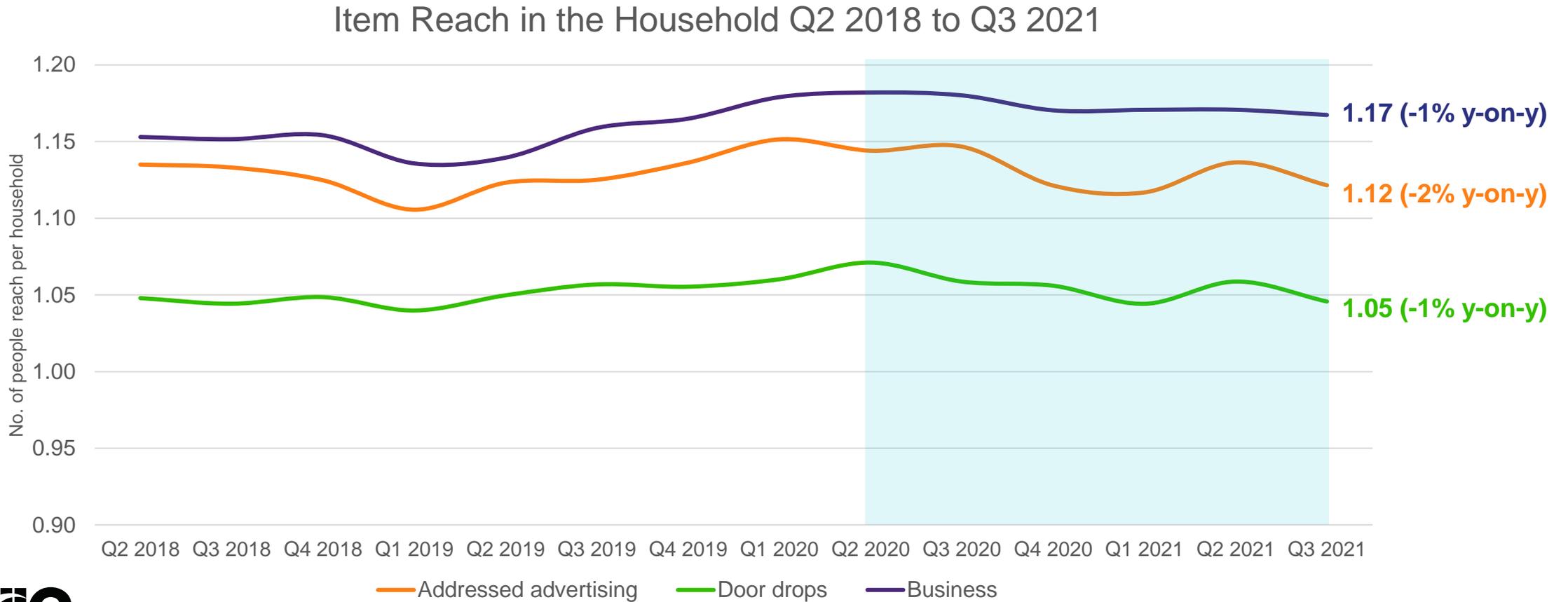
Q3 2021 year on year volume changes by category



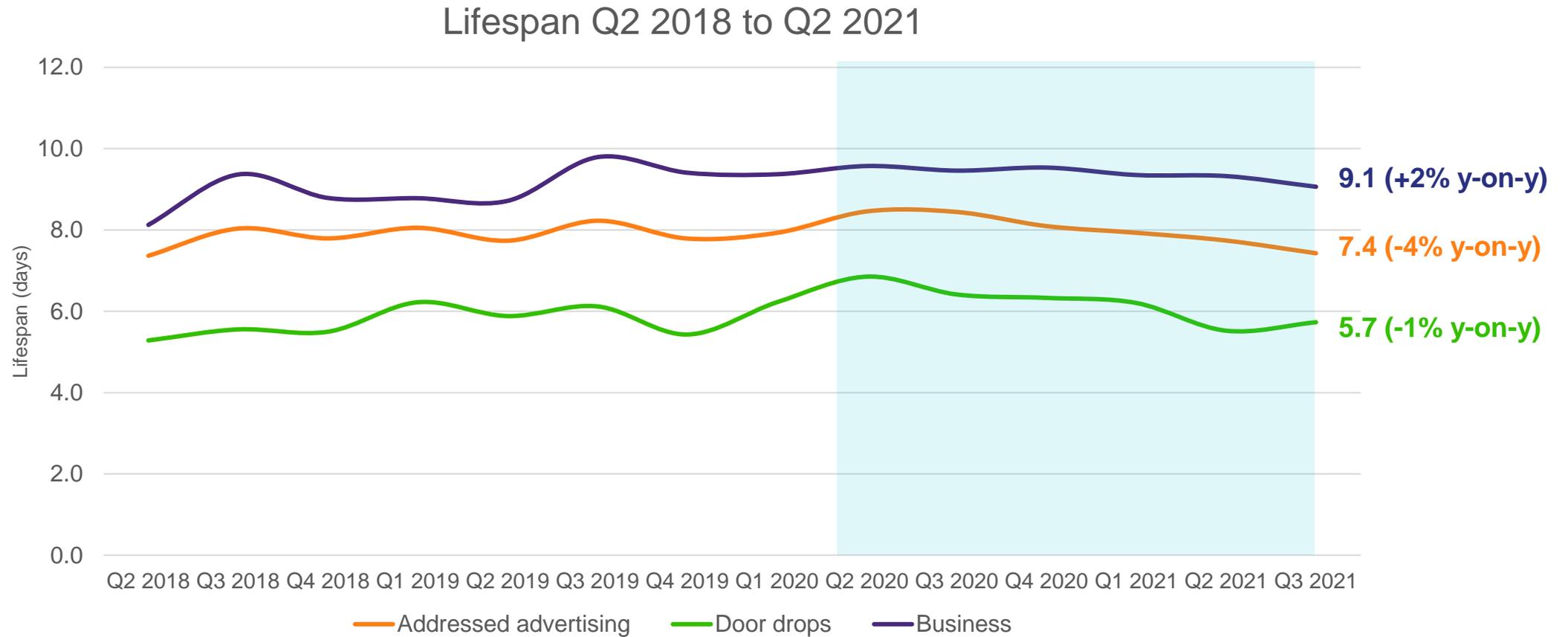
Frequency of interaction broadly returns to “normal” pre-pandemic levels ⁴



Similarly, item reach / mail sharing is virtually flat year on year

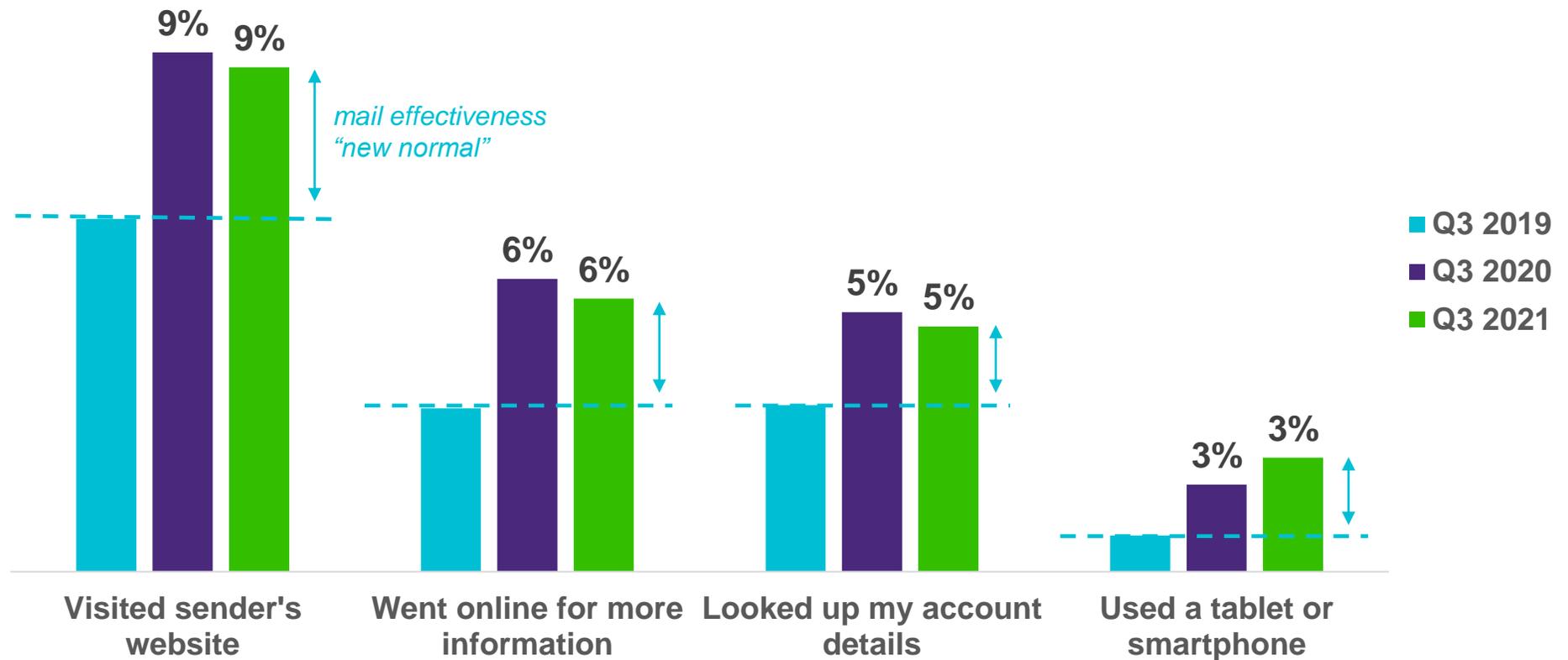


Business Mail lifespan up marginally year on year, while Direct Mail moves in the opposite direction



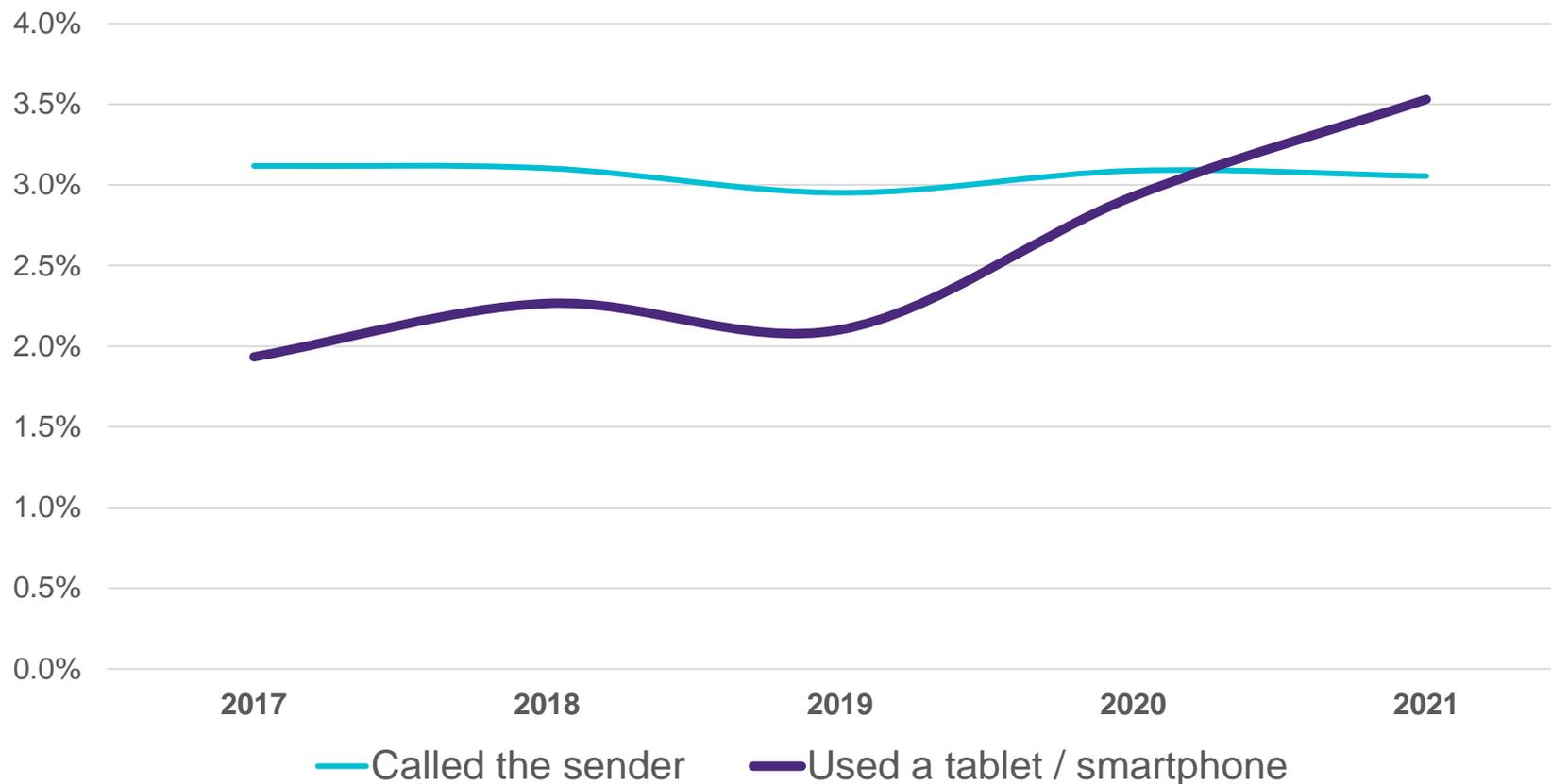
A “new normal” in mail’s effectiveness at driving digital actions was established in the pandemic and has been maintained over a year later

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



The mobile tipping point? More mail has prompted more smartphone usage than calls to advertisers so far in 2021

Mobile digital actions vs advertiser calls prompted by mail
(% of all mail items)

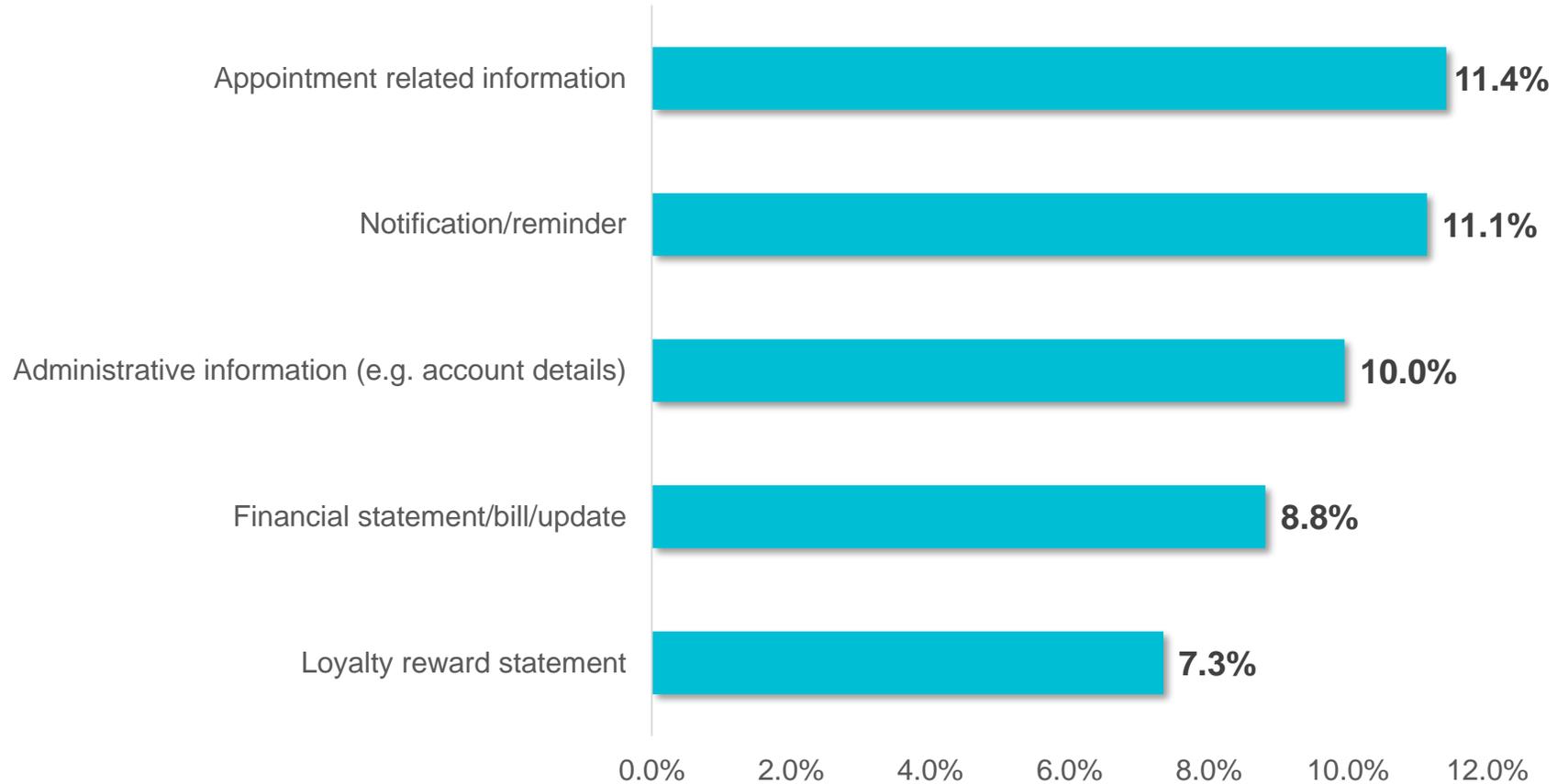


Mail Media Metrics

Source: JICMAIL Item Data Q2 2017 to Q3 2021 n=205,876 mail items
2017 = Q2, Q3 and Q4 2017
2021 = Q1, Q2 and Q3 2021

Customer-oriented mail messaging is the most likely to prompt smartphone / tablet usage

% of Direct Mail items prompting smartphone / tablet usage



Mail Media Metrics

Source: JICMAIL Item Data Q2 2017 to Q3 2021 n=94,294 Direct Mail Items

Advertiser activity

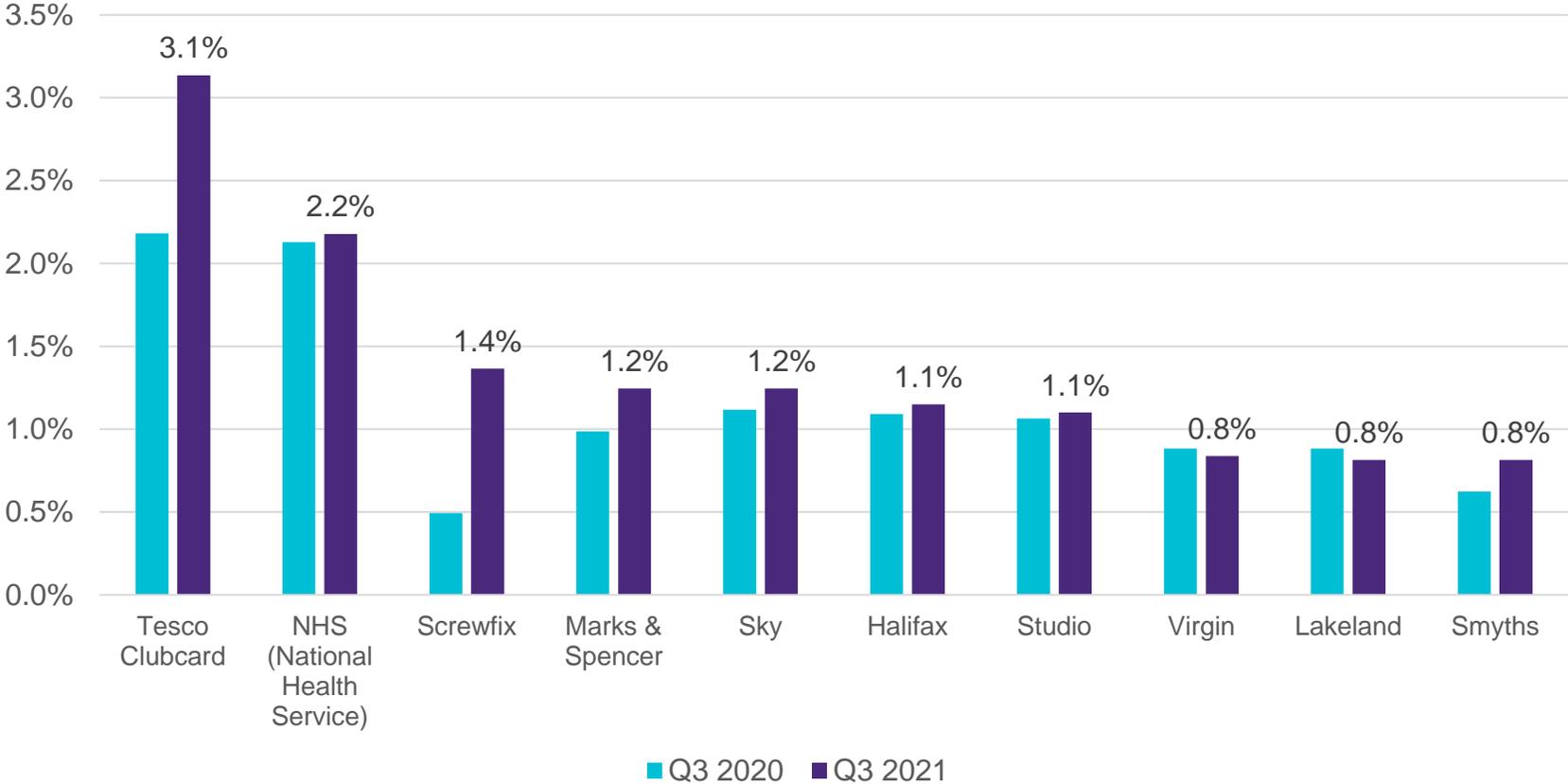
Q3 2021 Share of Door Mat



Mail Media Metrics

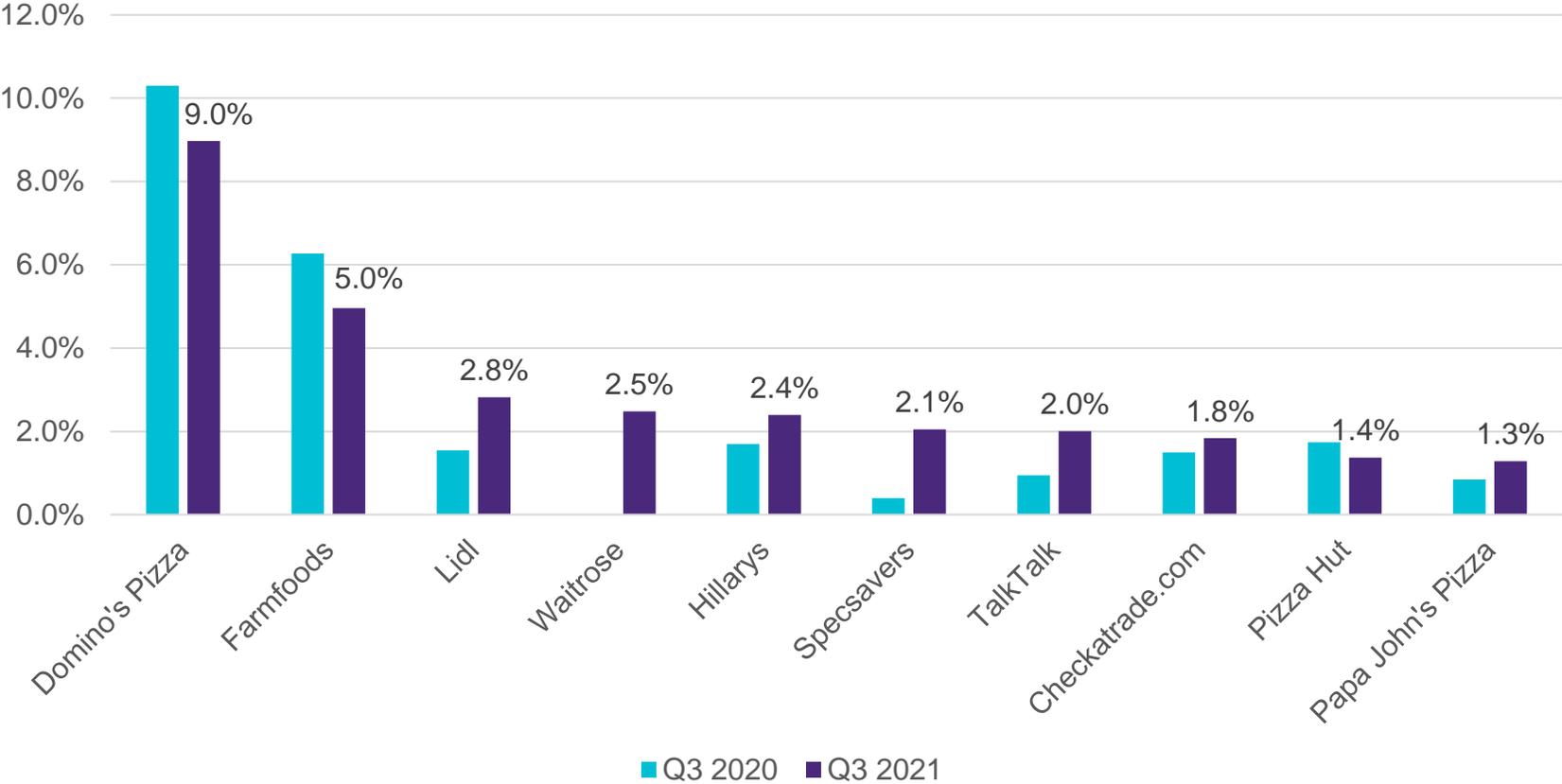
Of the top advertisers, Tesco, Screwfix and M&S have seen the largest gains in Direct Mail share of doormat in Q3

Share of Door Mat (% of DM items)
Q3 2021 vs Q3 2020



Retail brands up their share of doormat in the Door Drop channel. In addition TalkTalk doubles its visibility in the home

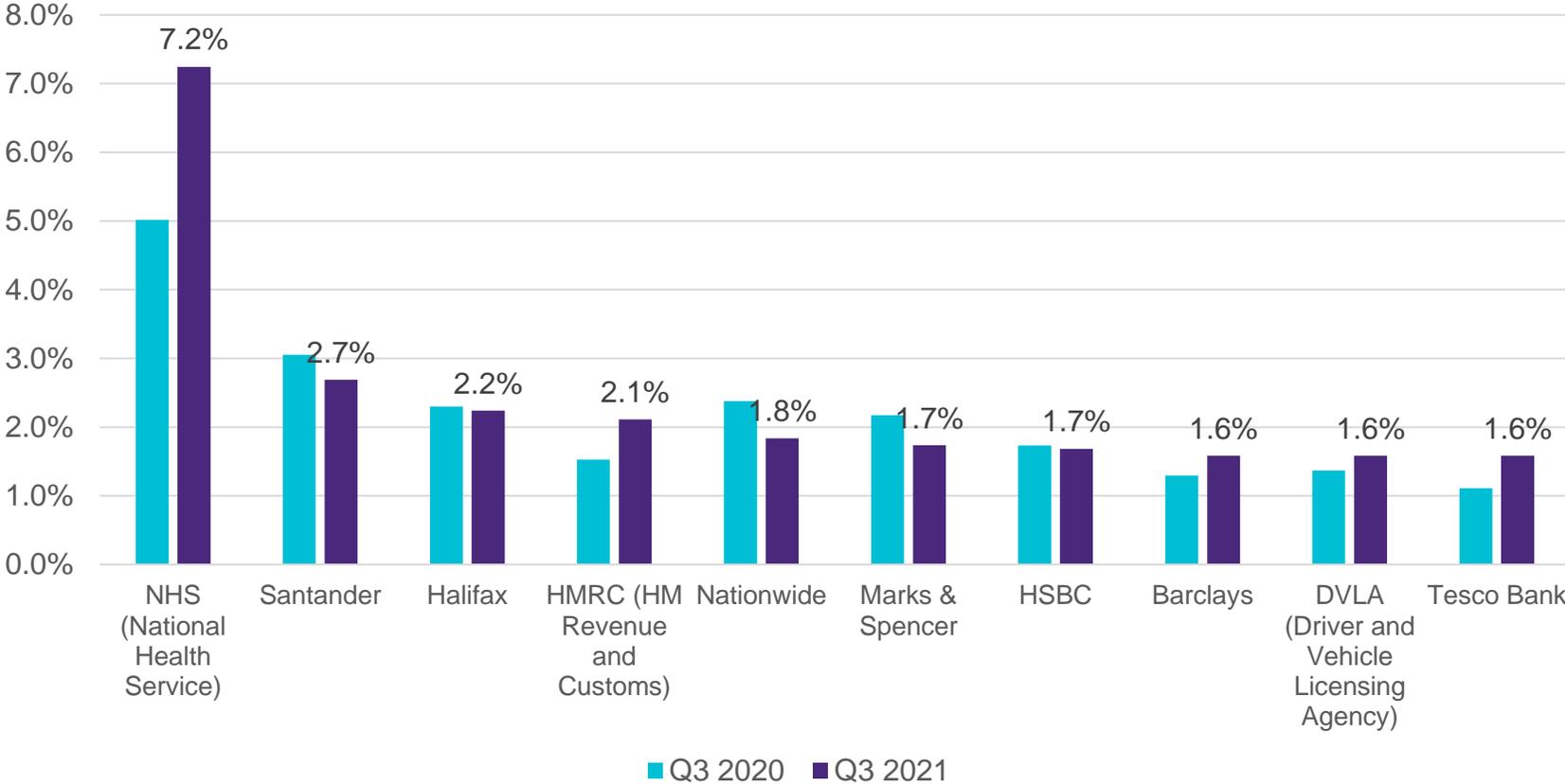
Share of Door Mat (% of Door Drop items)
Q3 2021 vs Q3 2020



Source: JICMAIL Mail Item Database Q3 2020 to Q3 2021

NHS continues to dominate the Business Mail rankings

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



What happened during Q3 2021?

1

Mail volumes continue to claw their way back after the pandemic, with volumes on the JICMAIL panel increasing 9% year on year.

2

Key mail metrics (reach, frequency and lifespan) have remained broadly flat year-on-year, growing within the range of -2% to +2% depending on the mail type and metric.

3

Mail's digital effectiveness has been maintained at the "new normal" benchmarks established during the pandemic. For the first time, tablet / smartphone actions prompted by mail have outstripped calls to advertisers.

Thanks

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