

JICMAIL Q4 2021

Key Results

February 2022

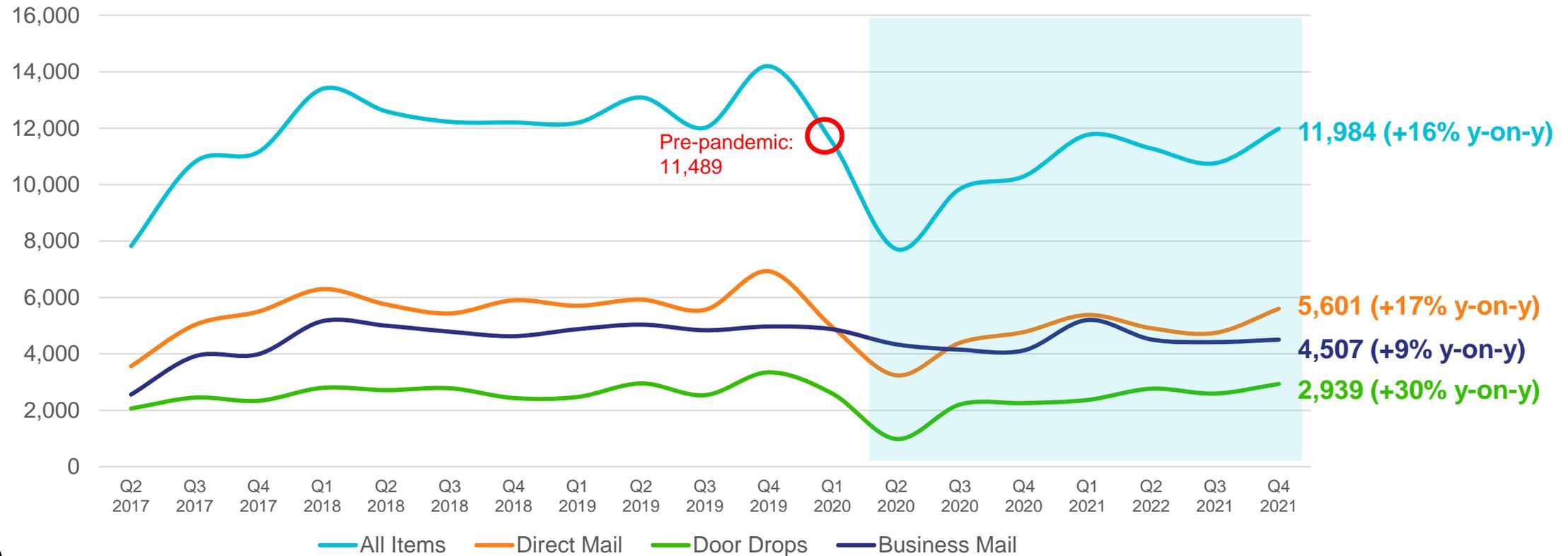
**JIC
MAIL**

Mail Media Metrics



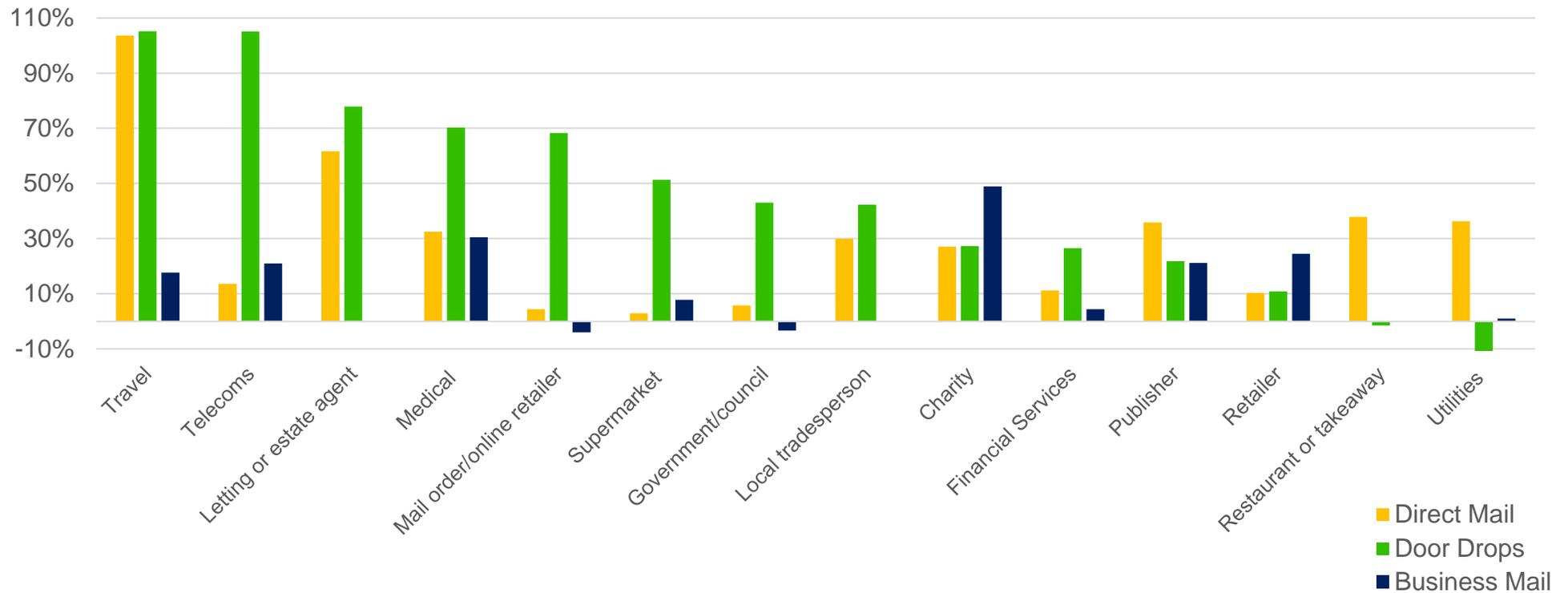
Mail volumes up 16% and now ahead of where they were pre-pandemic

JICMAIL Volumes Q2 2017 to Q4 2021

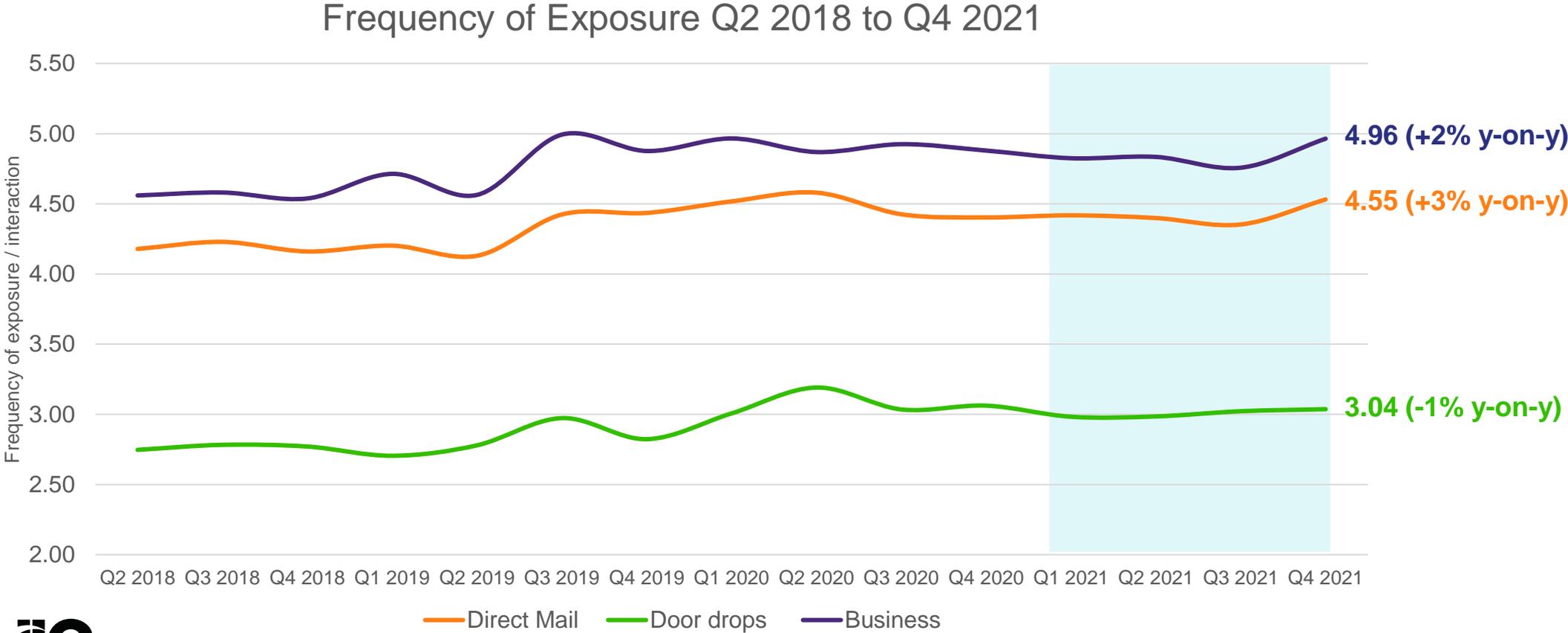


Virtually all industry sectors have been responsible for the above average growth rate in Door Drop volumes

Q4 2021 year on year volume changes by category



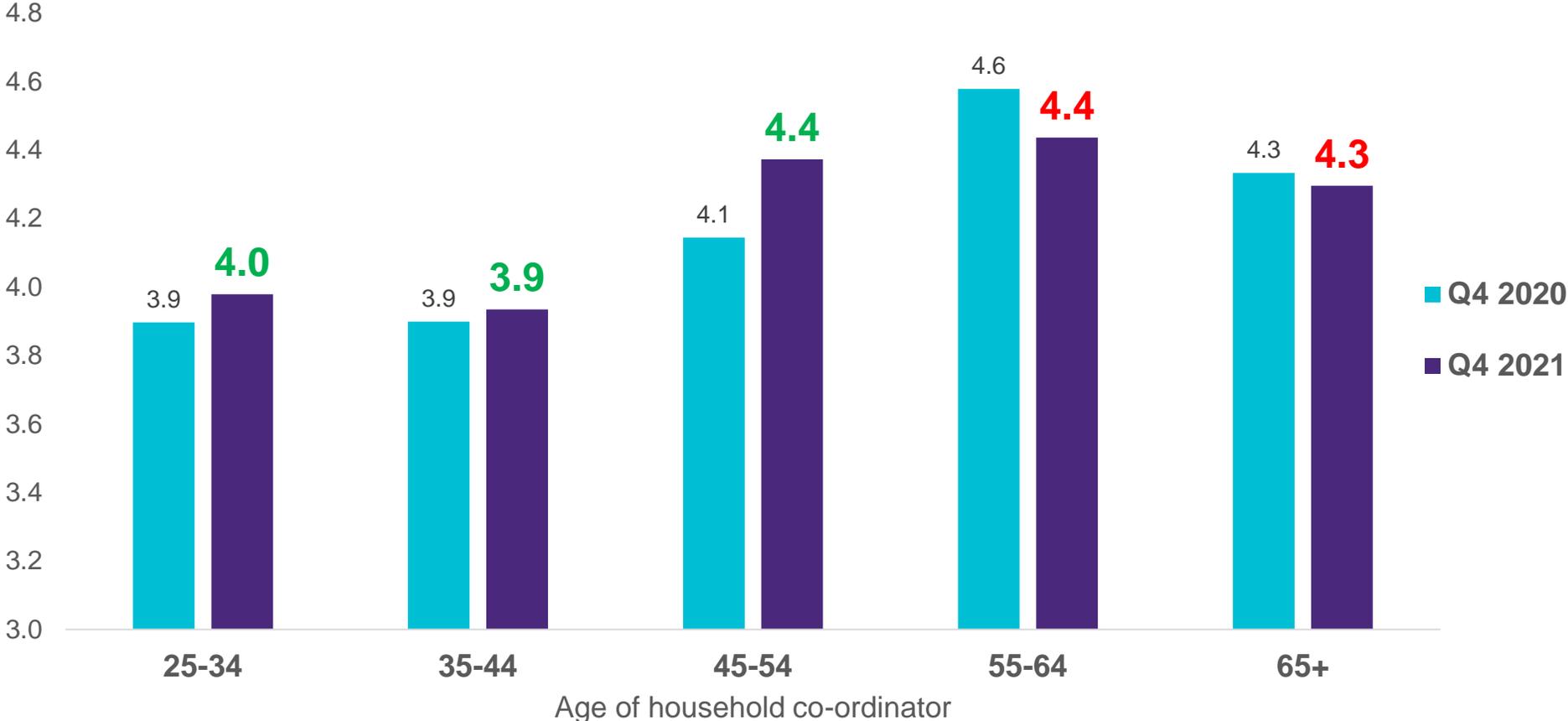
Marginal upticks in mail engagement rates in the 2021 festive period



Source: JICMAIL Item Data Q2 2017 to Q4 2021 n=216,866 mail items

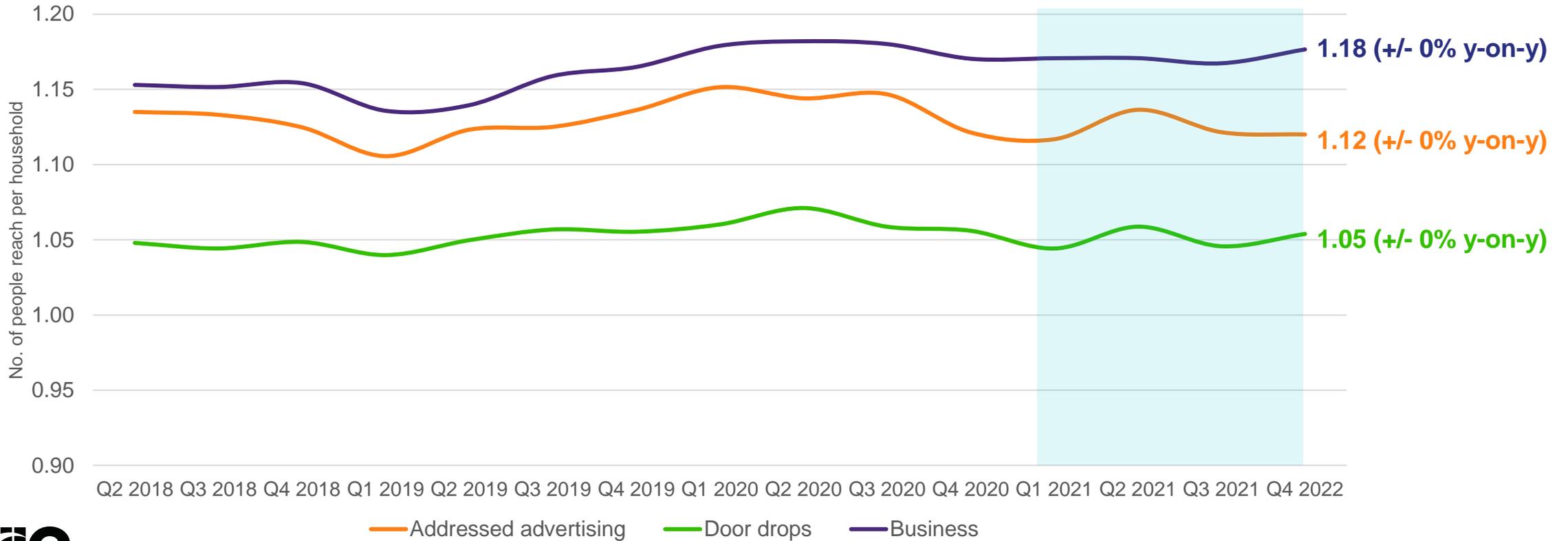
Increased frequency of mail interaction driven by younger audiences

Direct Mail Frequency of Interaction by Age

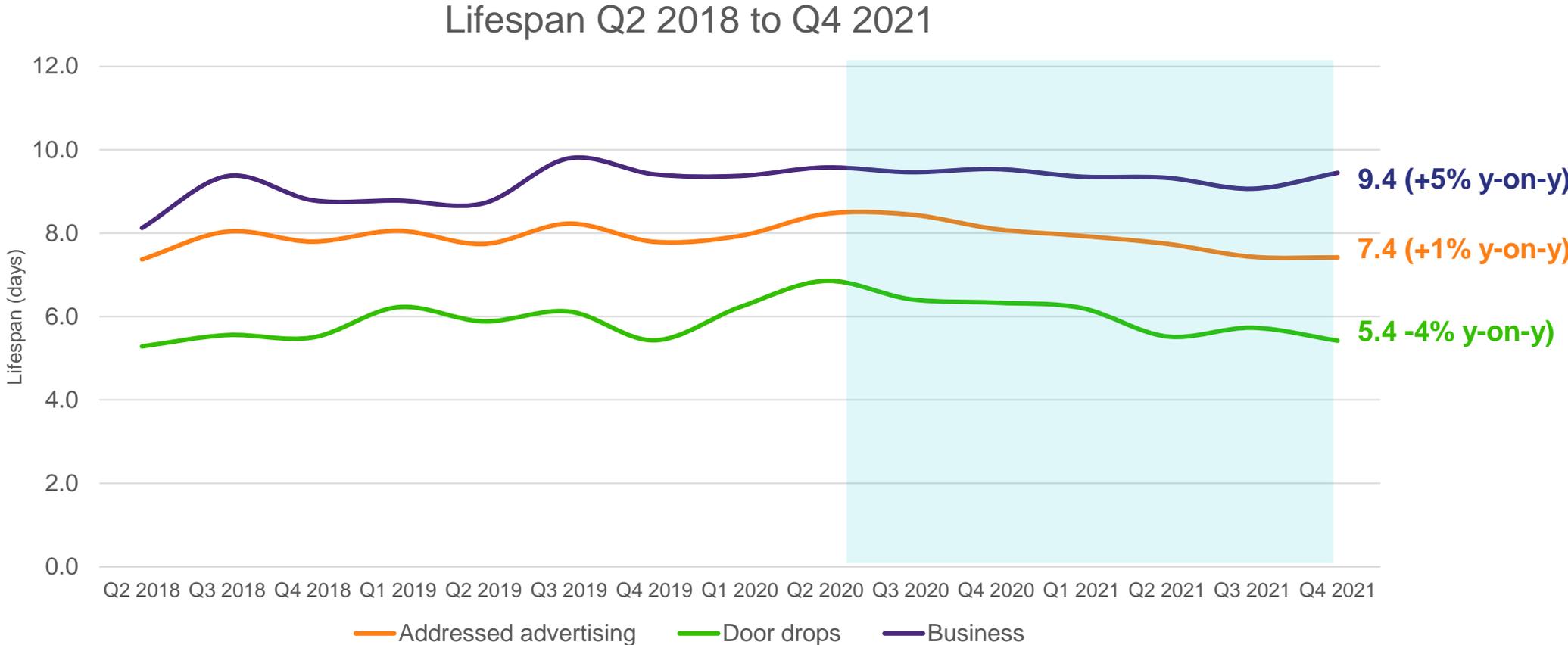


Mail sharing has remained stable year-on-year

Item Reach in the Household Q2 2018 to Q4 2021



Business mail lifespan increases for the third quarter in a row



Source: JICMAIL Item Data Q2 2017 to Q4 2021 n=216,866 mail items

Advertiser activity

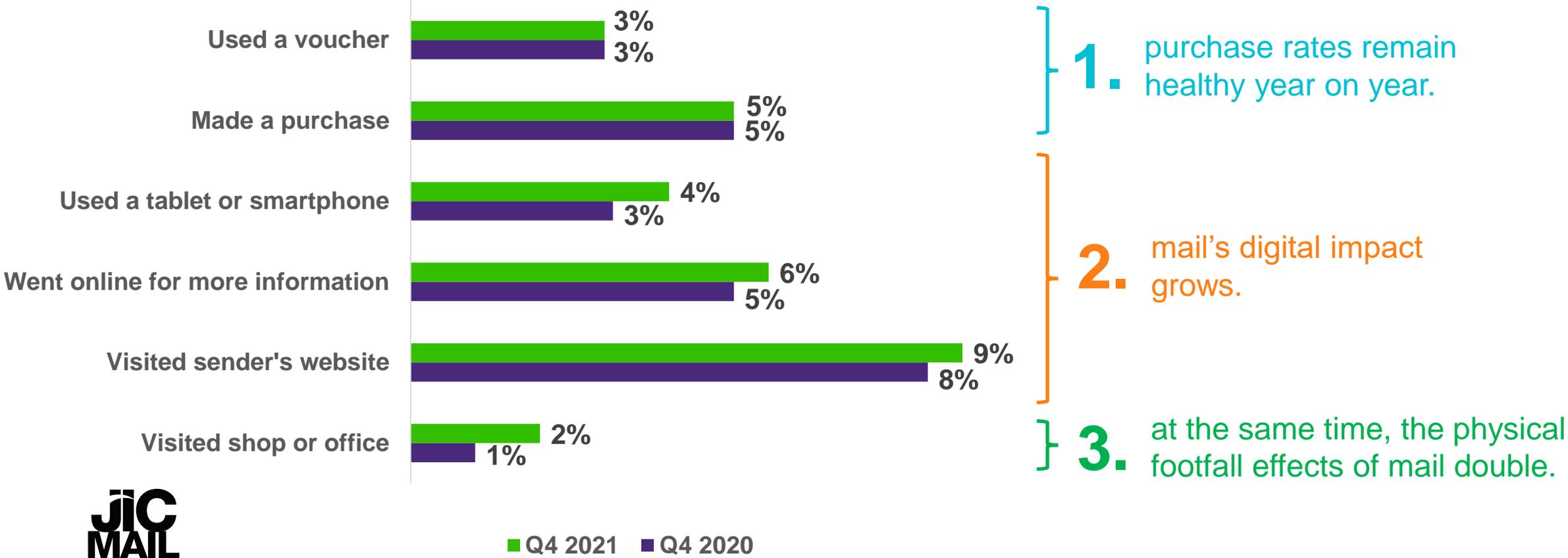
Q4 2021 Mail Effectiveness



Mail Media Metrics

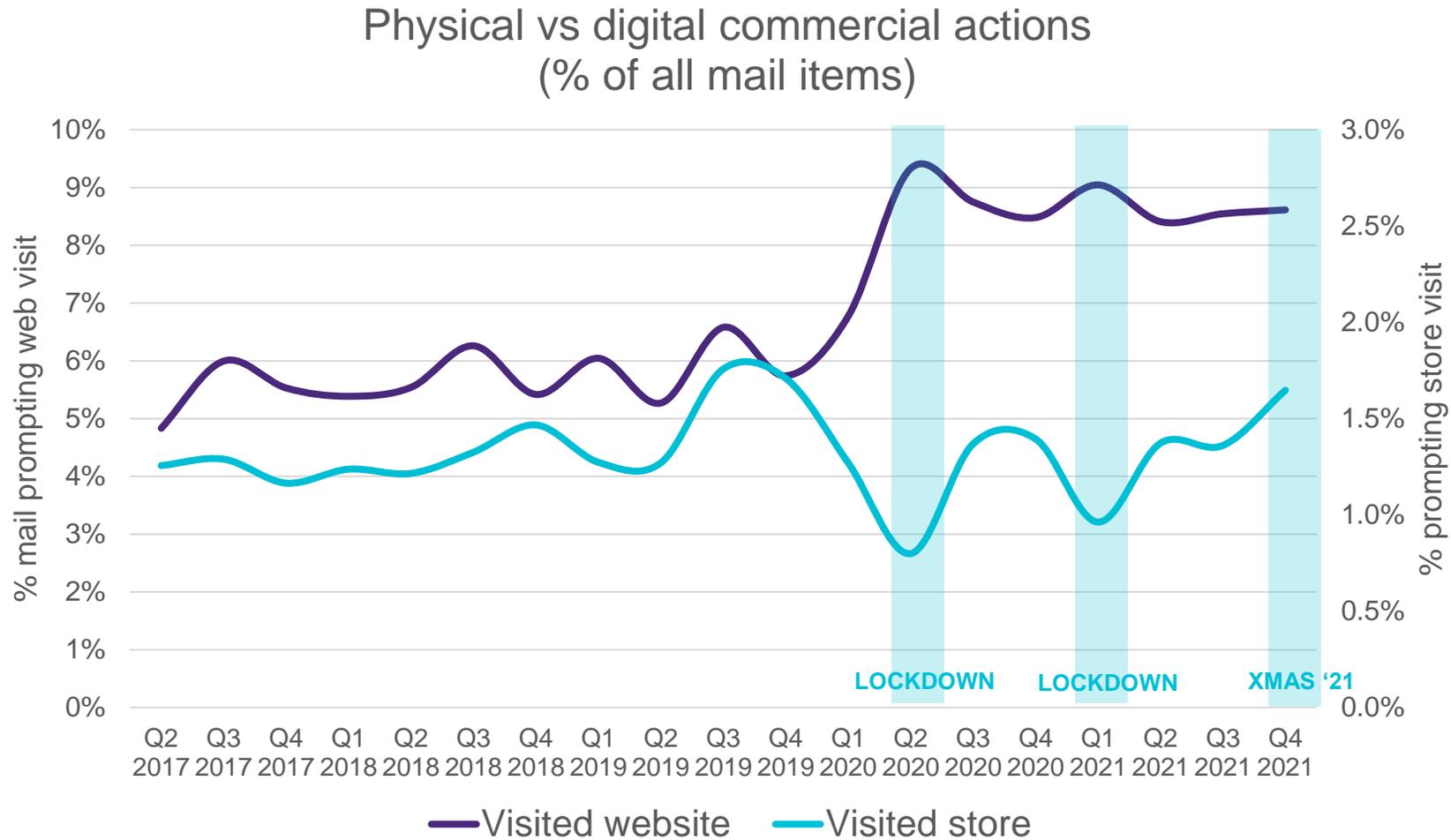
Mail's effectiveness story in 2021: improved digital AND physical impact 9

Commercial Actions (All Mail Types) % of mail items



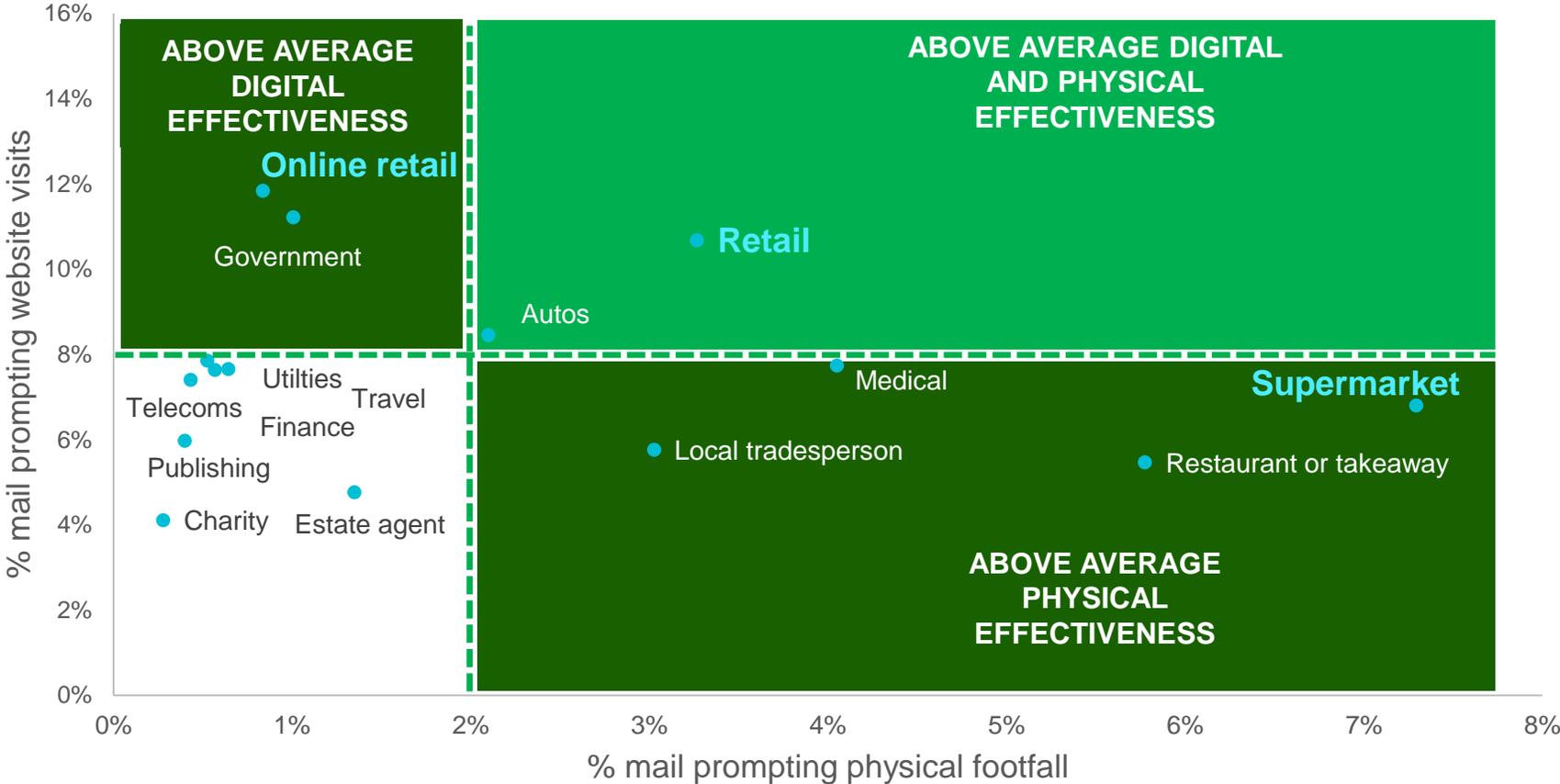
Source: JICMAIL Item Data Q2 2017 to Q4 2021 n=216,866 mail items

With the UK avoiding another lockdown in Q4 2021, mail's footfall effects have continued to rebound while new found digital effects are sustained



Retailers are driving above average levels of physical and website traffic with their mail. Supermarkets could do more to drive digital effects

Digital vs Physical Direct Mail Effectiveness



Source: JICMAIL Item Data Q2 2017 to Q4 2021 n=99,610 direct mail items

Advertiser activity

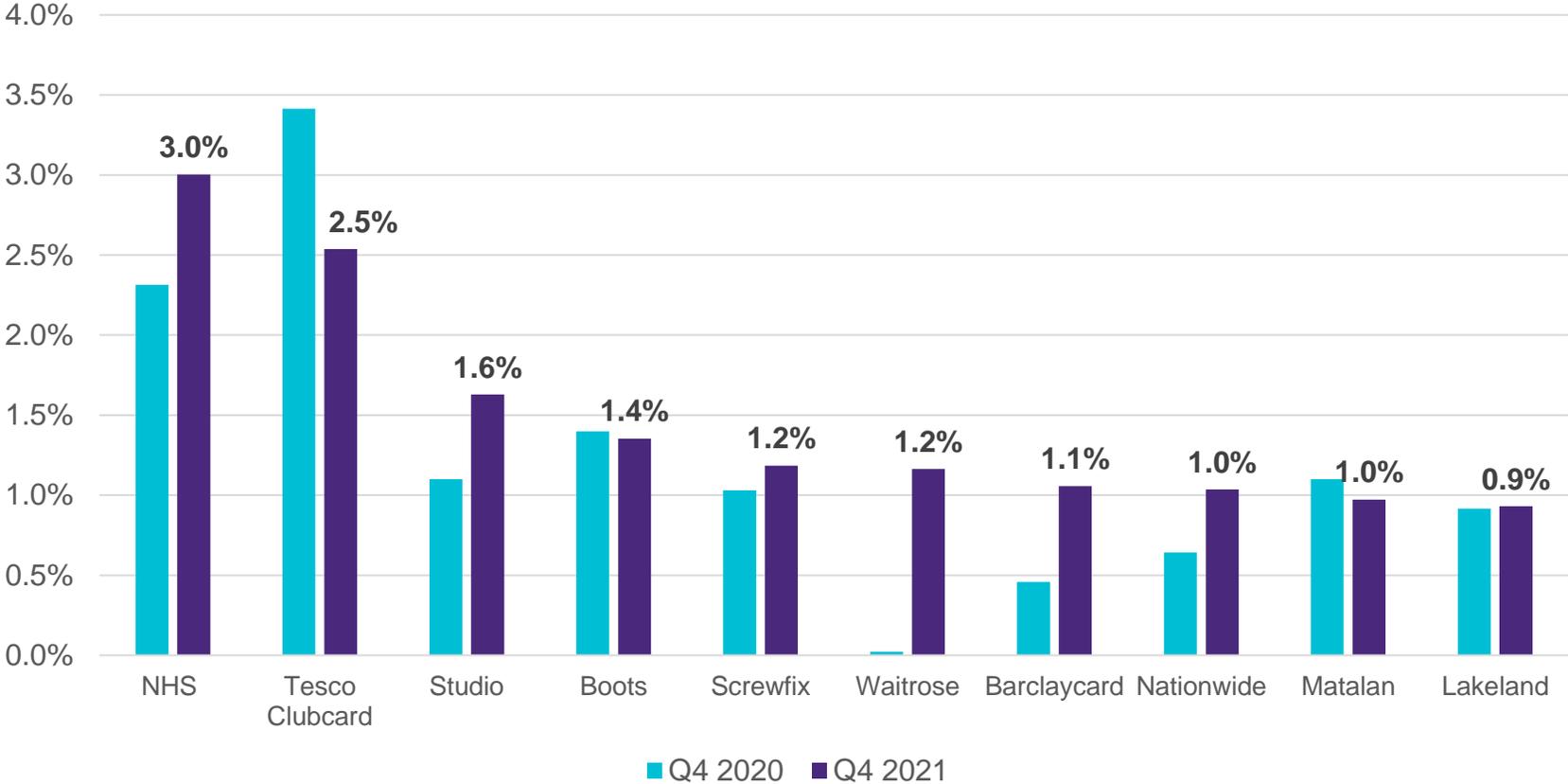
Q4 2021 Share of Door Mat



Mail Media Metrics

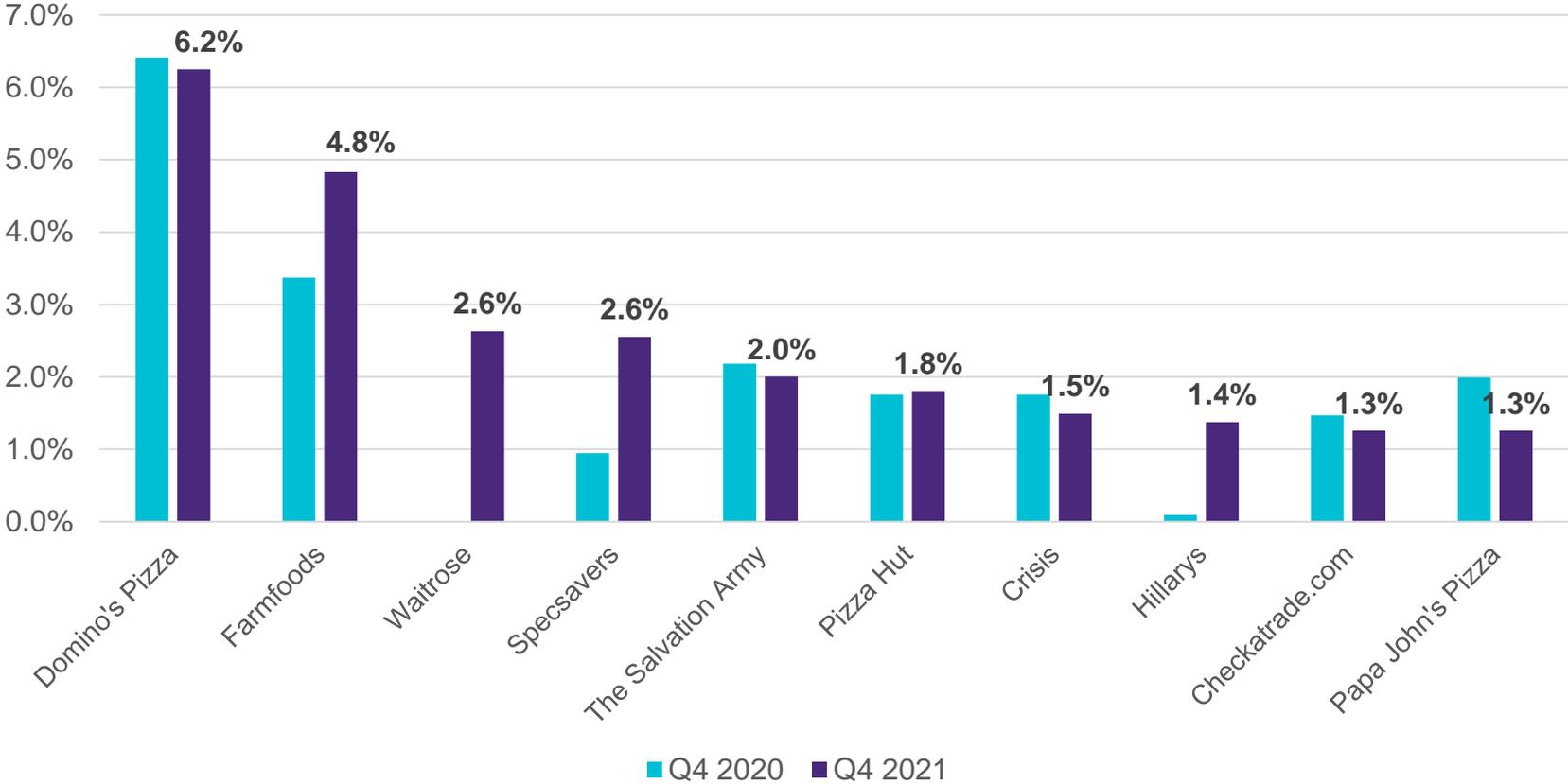
NHS trades places with Tesco to top the Q4 Direct Mail share of door mat rankings

Share of Door Mat (% of DM items)
Q4 2021 vs Q4 2020



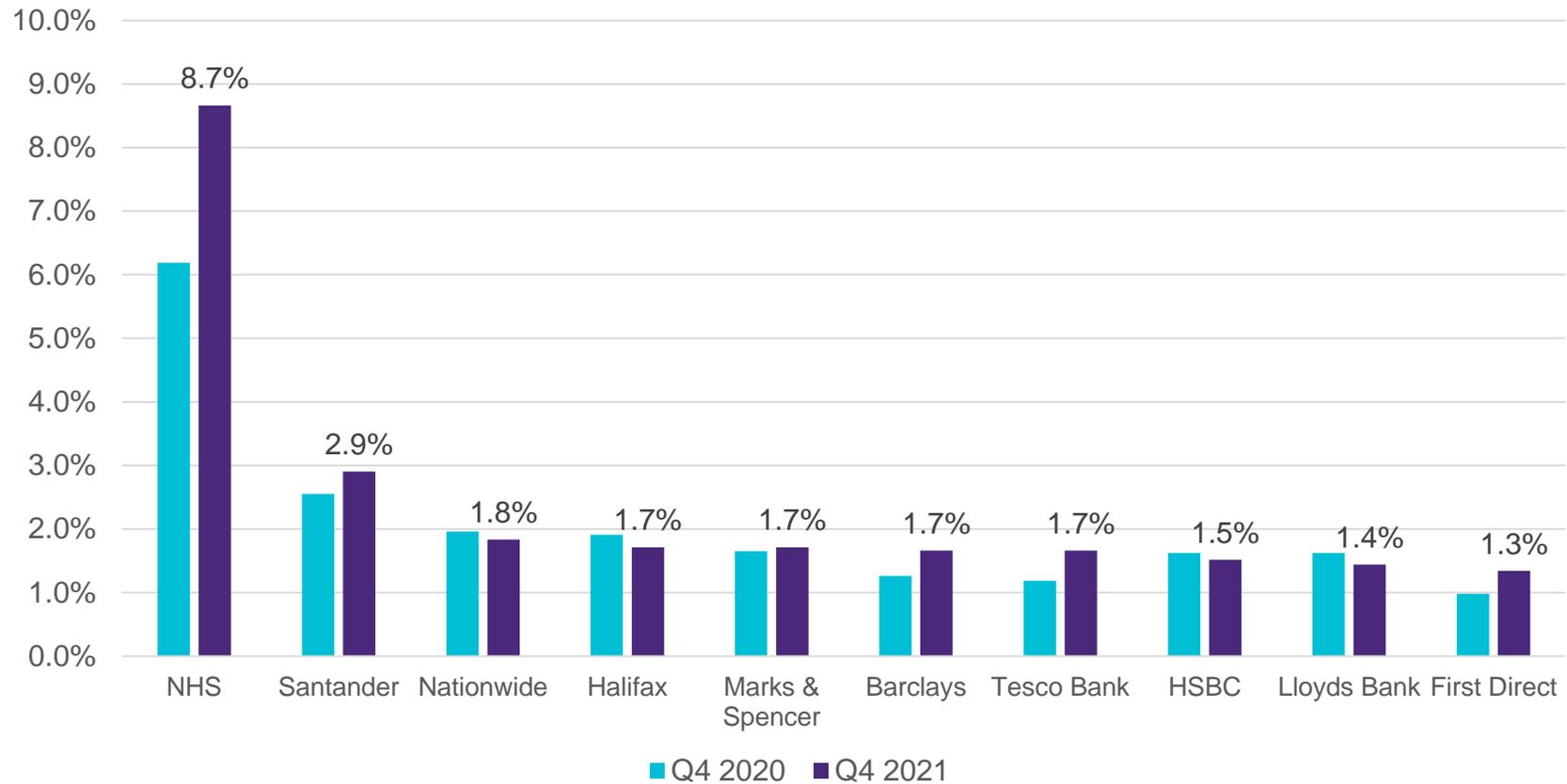
Farmfoods, Waitrose and Specsavers record the biggest share of door mat gains in the Door Drop channel

Share of Door Mat (% of Door Drop items)
Q4 2021 vs Q4 2020



The NHS again dominated the Business Mail rankings in Q4

Share of Door Mat (% of **Business Mail** items)
Q4 2021 vs Q4 2020



What happened during Q4 2021?

1

Mail volumes have recovered to the extent that they are now in excess of where they were in the last pre-pandemic period of Q1 2020 (11,984 items tracked in Q4 2021 vs 11,489 in Q1 2020).

2

Direct Mail and Business Mail have both recorded uplifts in frequency of interaction in Q4 2021. Most notably this uplift has been driven by younger audiences for Direct Mail, with 25-34, 35-44 and 45-54 year olds all interacting with mail more than they were a year ago.

3

Mail has recorded year on year uplifts in both digital and physical effects, with the retail sector performing above average on both measures.

Thanks

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