

JICMAIL Q1 2022

Key Results

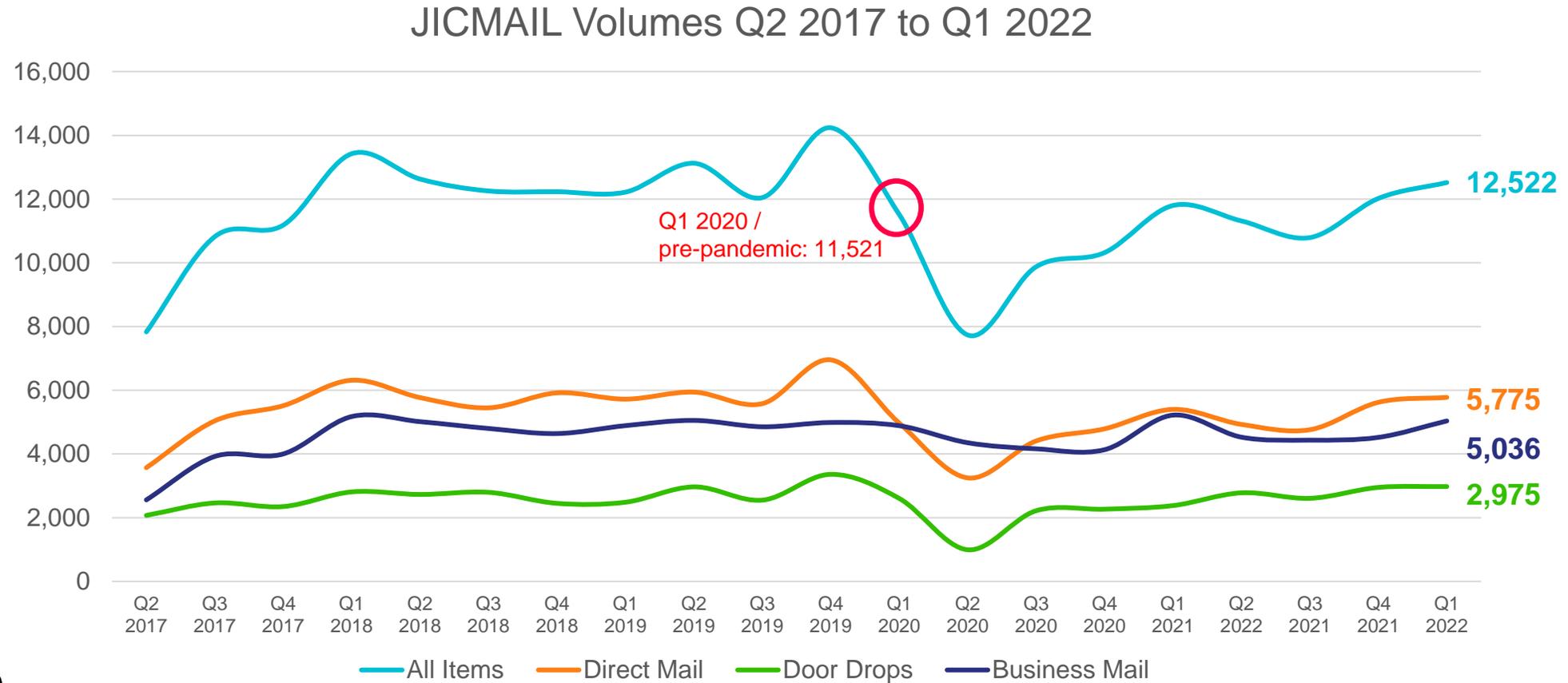
May 2022

**JIC
MAIL**

Mail Media Metrics

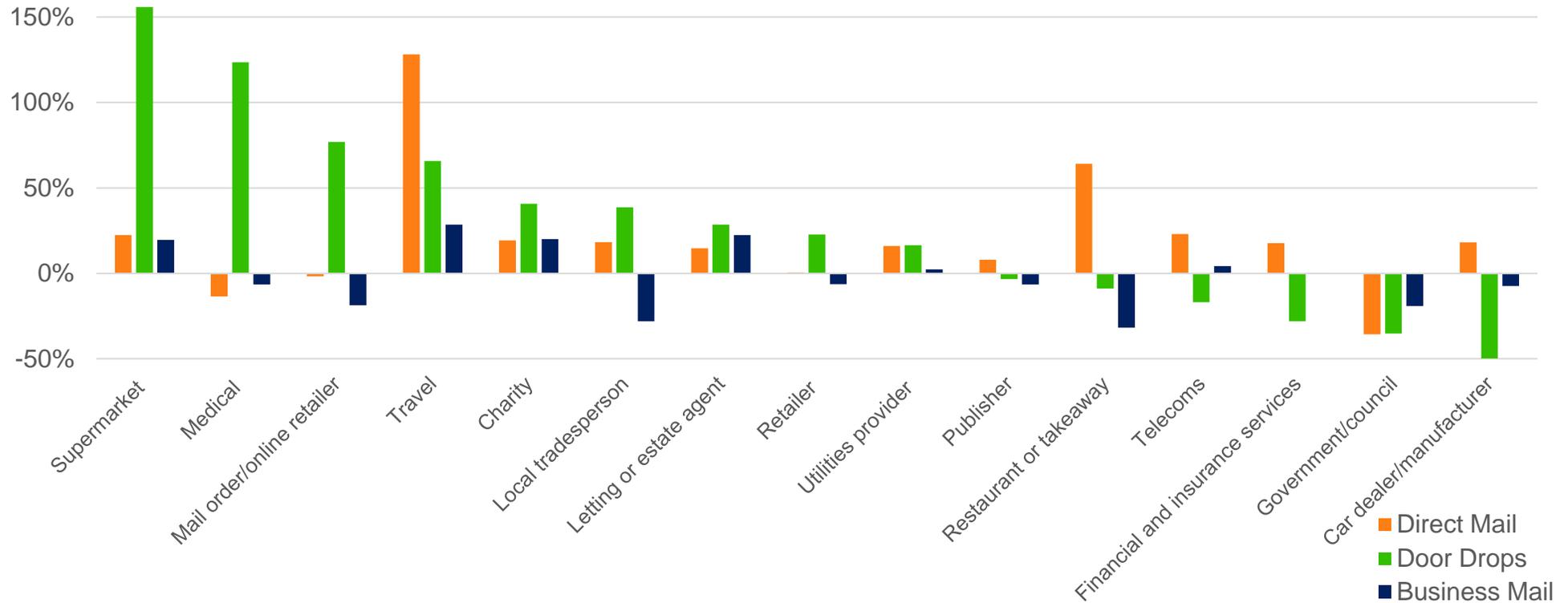


Mail volumes up to their highest level in two years.

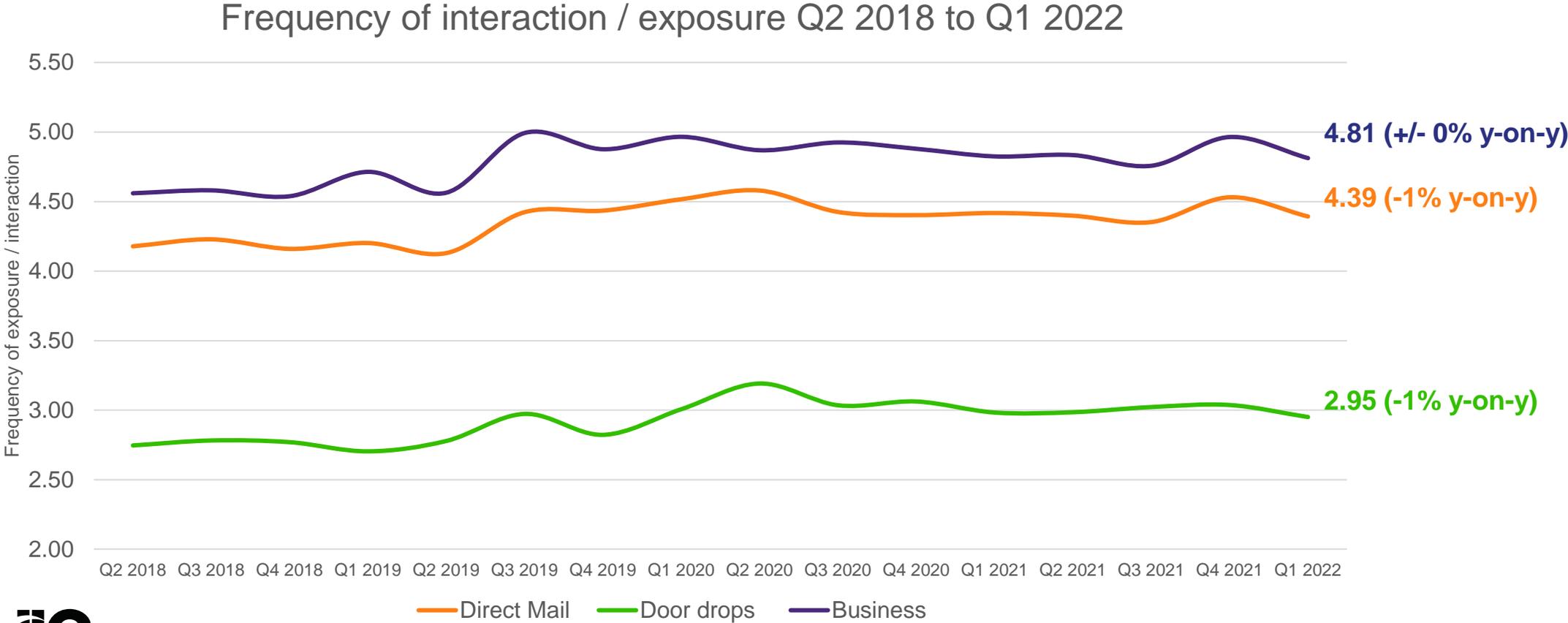


Supermarket and medical advertisers have driven the Door Drop volume uptick. Travel advertisers record the highest growth in Direct Mail.

Q1 2022 year-on-year volume changes by category

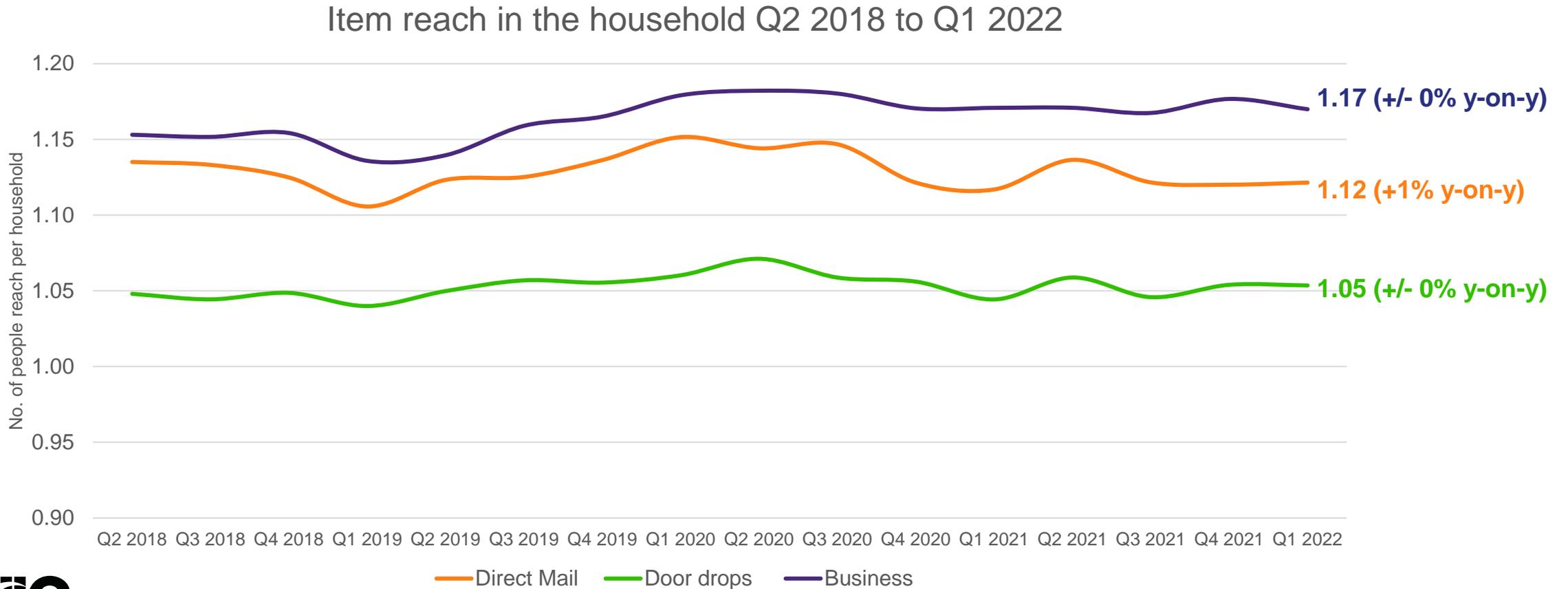


Frequency of interaction / exposure very stable year-on-year



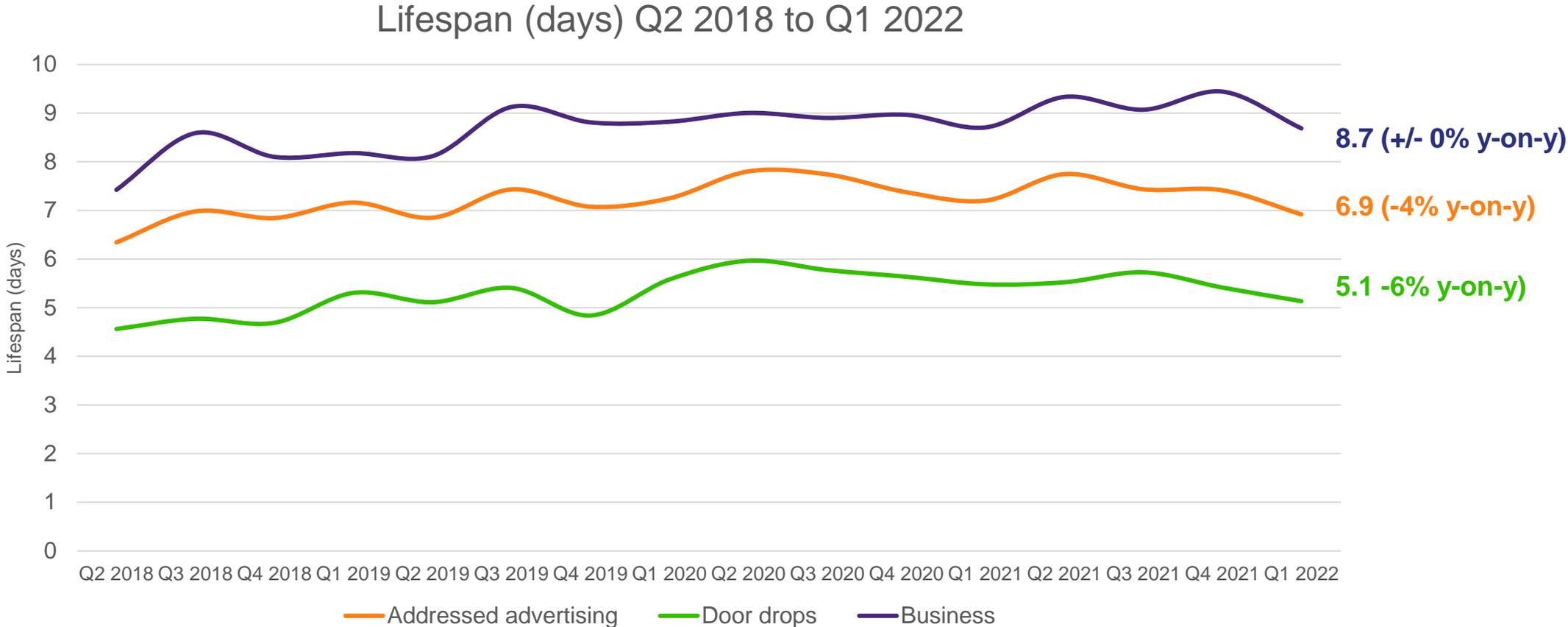
Source: JICMAIL Item Data Q2 2017 to Q1 2022 n=229,953 mail items

Mail sharing and therefore overall audience reach again very stable



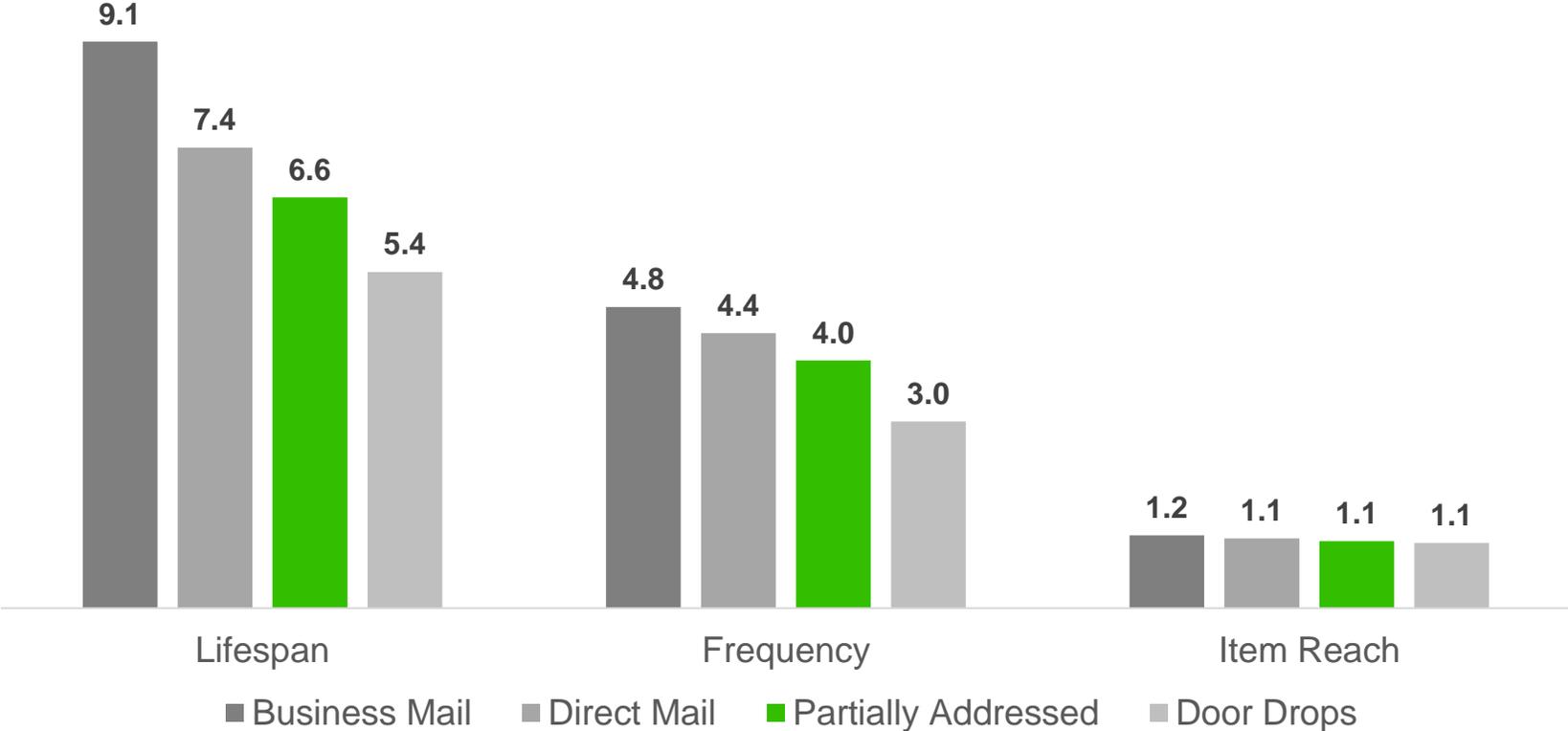
Source: JICMAIL Item Data Q2 2017 to Q1 2022 n=229,953 mail items

Business Mail is retained the longest, for nearly nine days on average



Partially addressed mail metrics now part of JICMAIL reporting as standard

Mail media metrics across key mail types
Q2 2021 to Q1 2022



Source: JICMAIL Item Data Q2 2021 to Q1 2022 n=46,658 mail items

Advertiser activity

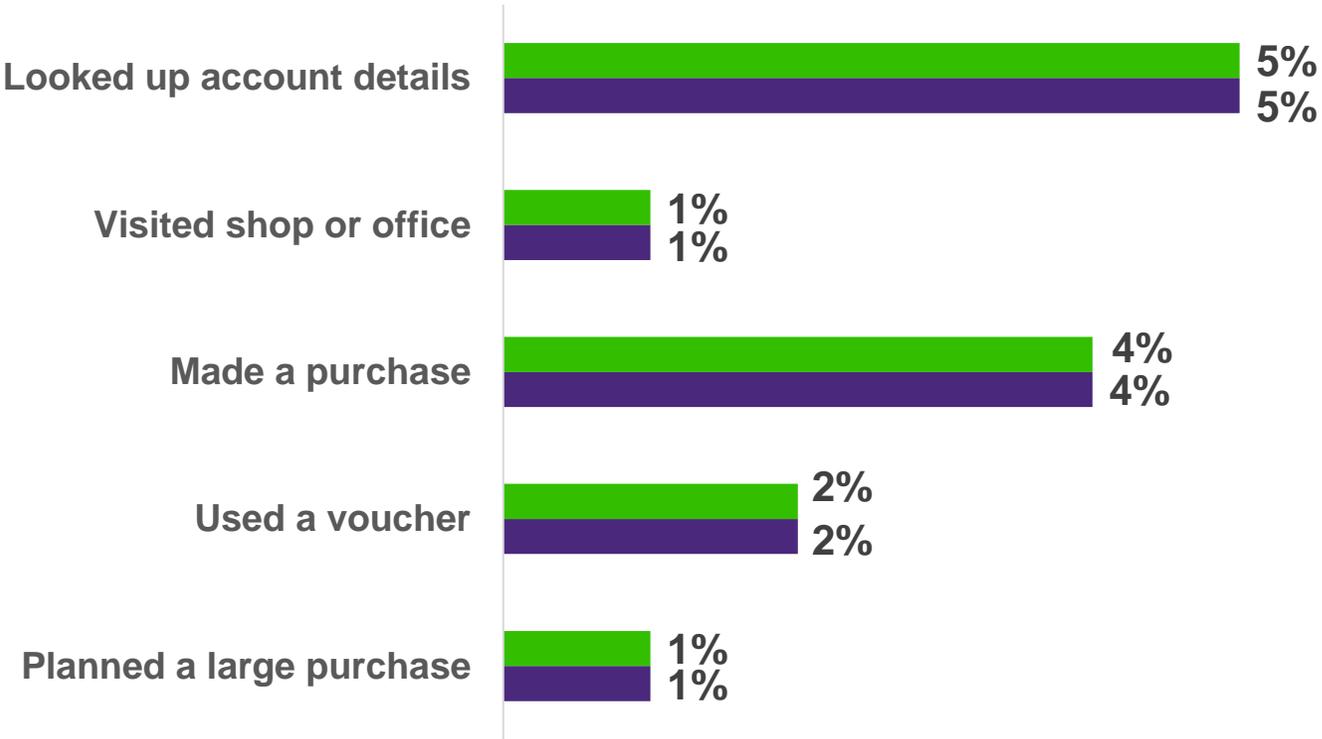
Q1 2022 Mail Effectiveness



Mail Media Metrics

The commercial effectiveness of mail has remained strong in the late pandemic phase

Commercial Actions (All Mail Types) % of mail items



- 1. mail continues to drive digital customer engagement
- 2. at the same time, the physical footfall effects of mail remain
- 3. purchase rates remain healthy year on year.

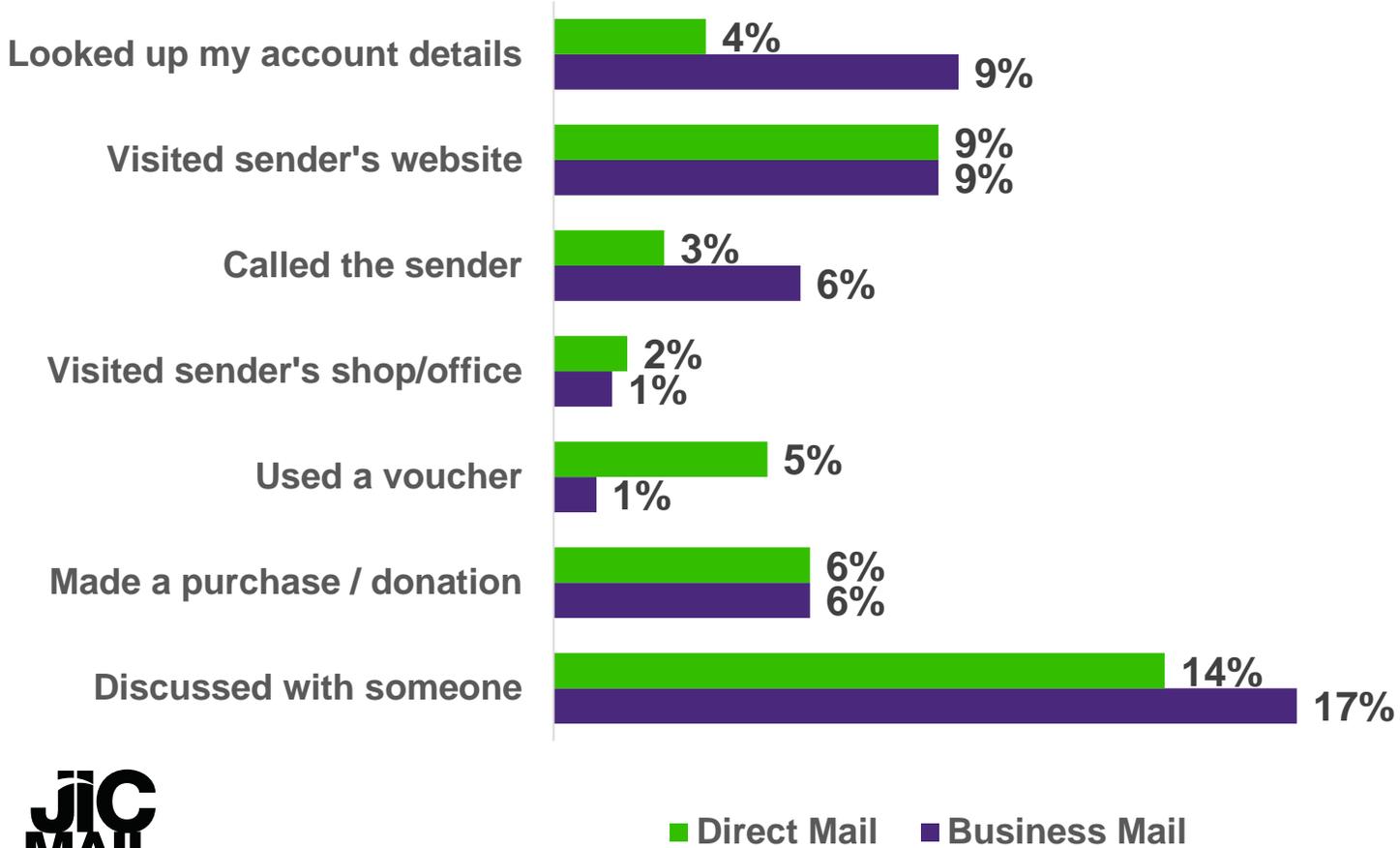


■ Q1 2022 ■ Q1 2021

Source: JICMAIL Item Data Q1 2022 n=12,522 mail items

Business mail does more than just engage customers

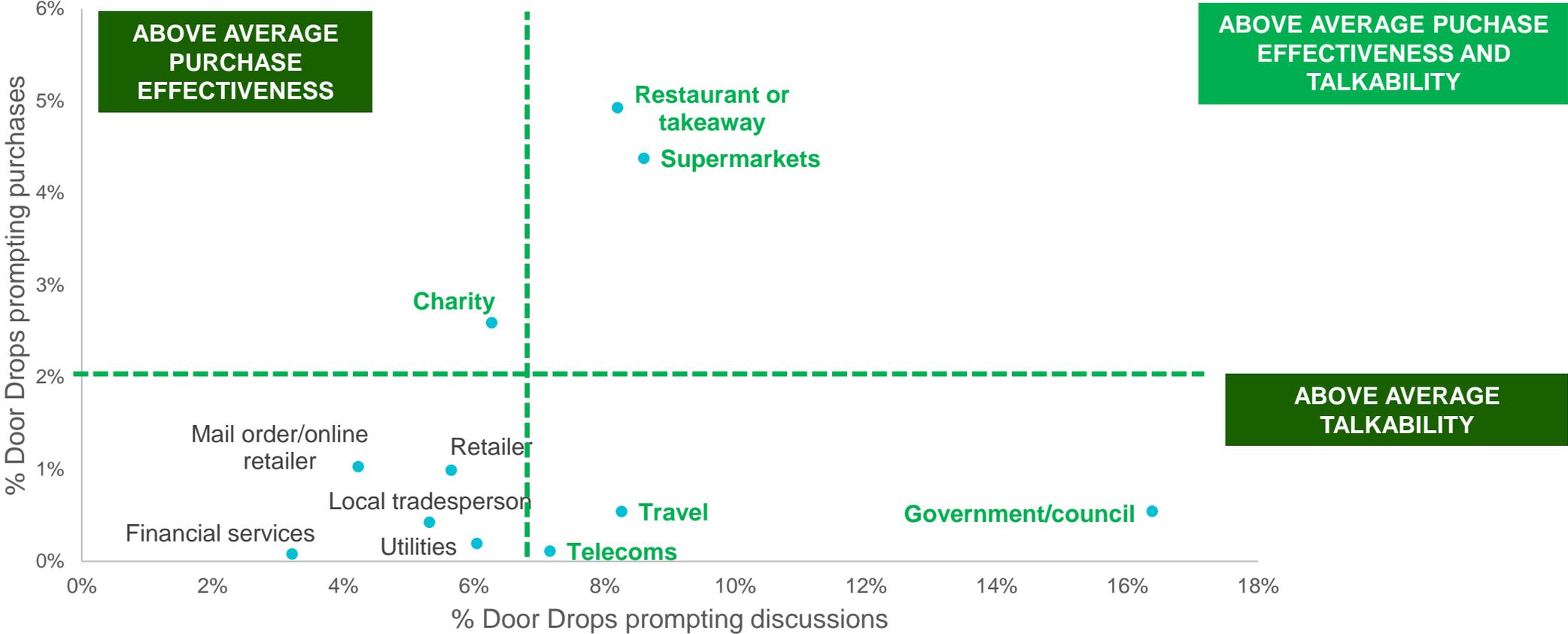
Commercial actions: Business Mail vs Direct Mail % of mail items



- 1. business mail prompts higher levels of customer engagement than DM
- 2. while direct mail is more likely to drive footfall and voucher redemption, business mail is just as likely to result in a purchase
- 3. the contents of business mail are more likely to be discussed than DM

Door Drops do more than just drive sales: Grocers, restaurants and public sector Door Drops also have high talkability

Door Drop purchase effectiveness vs discussions prompted



Advertiser activity

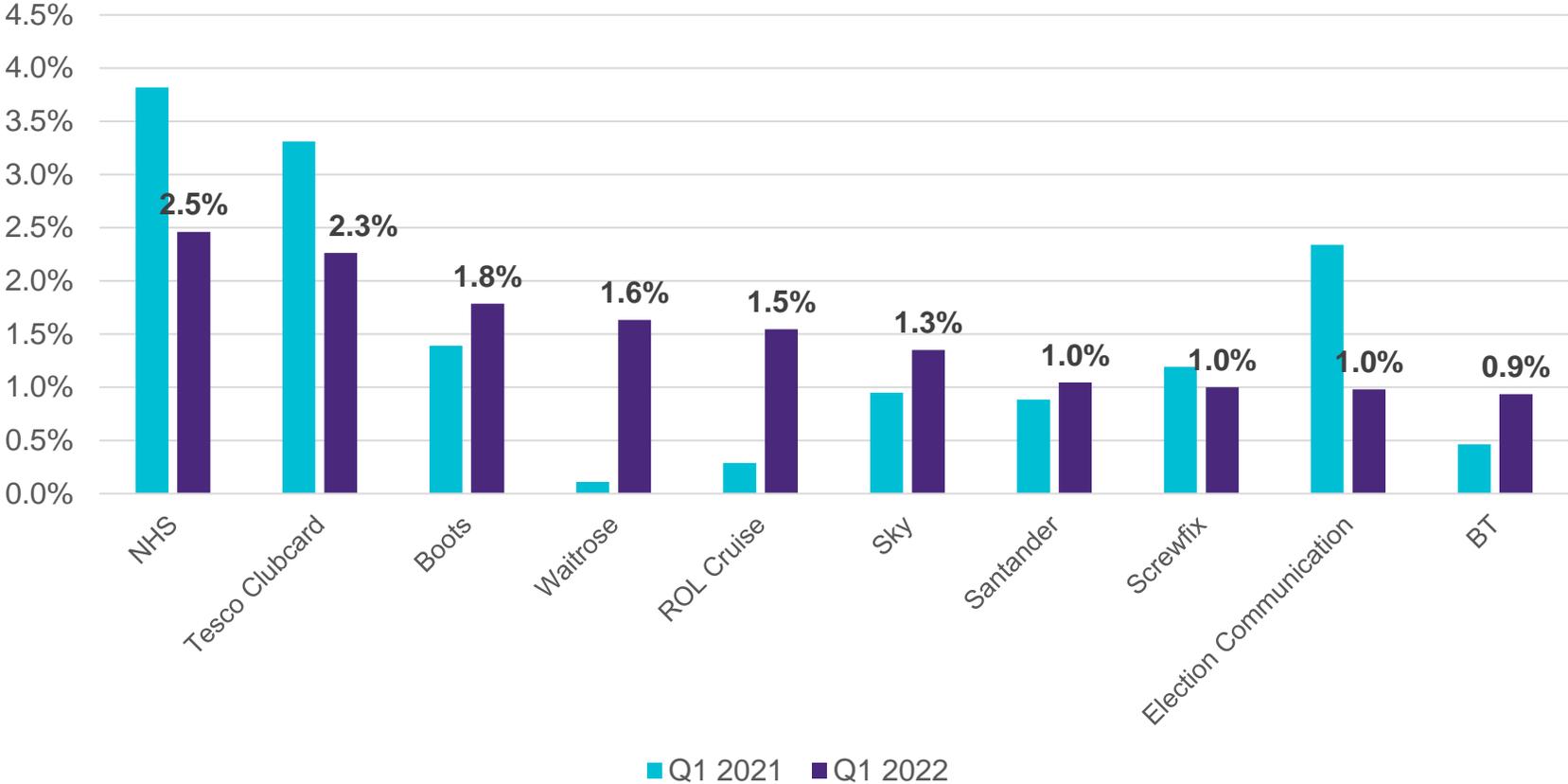
Q1 2022 Share of Door Mat



Mail Media Metrics

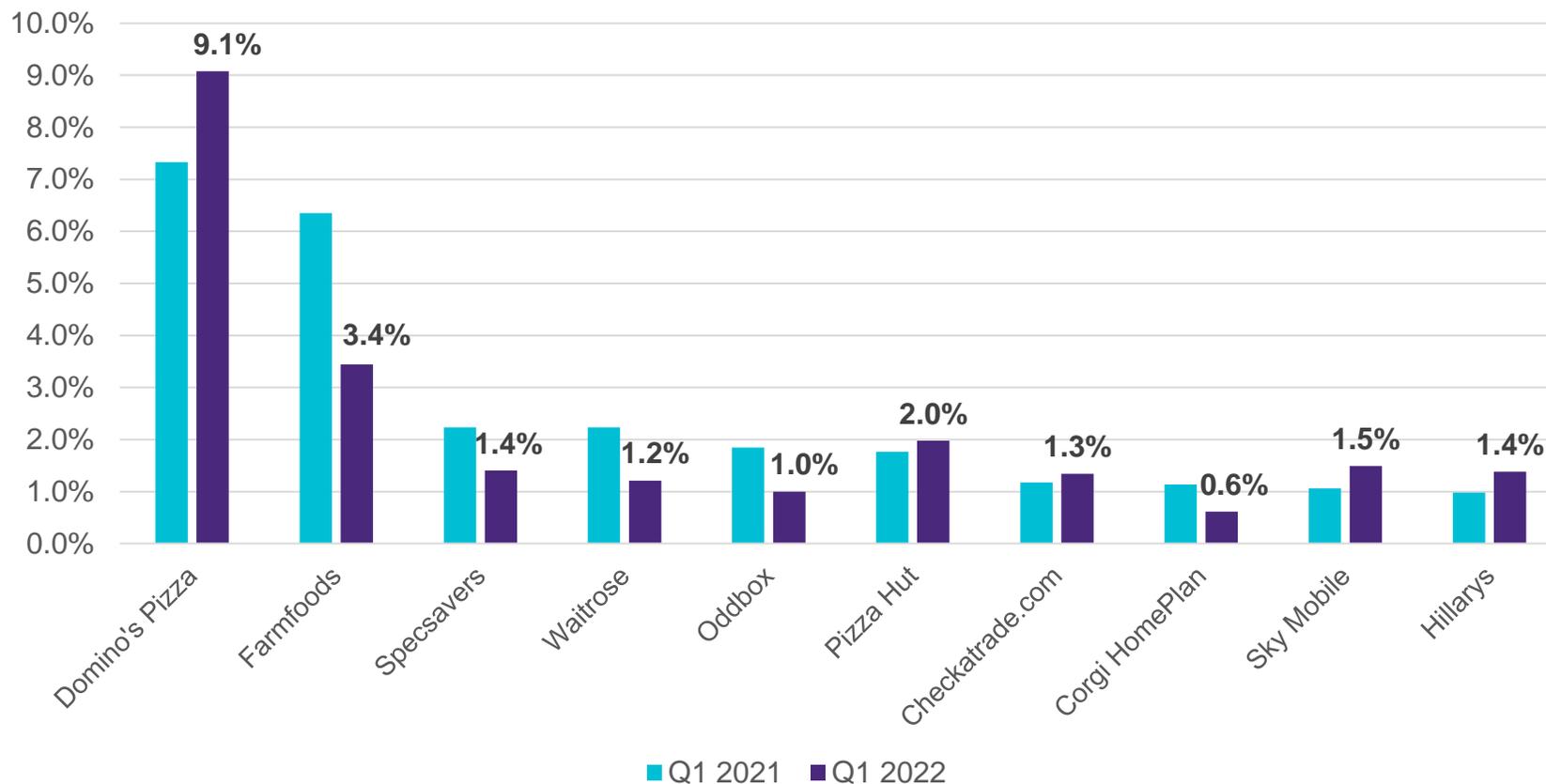
Big share of door mat gains for Waitrose and ROL Cruises in Q1 2022, while NHS, Tesco and Election Communications declined

Share of Door Mat (% of DM items)
Q1 2022 vs Q1 2021



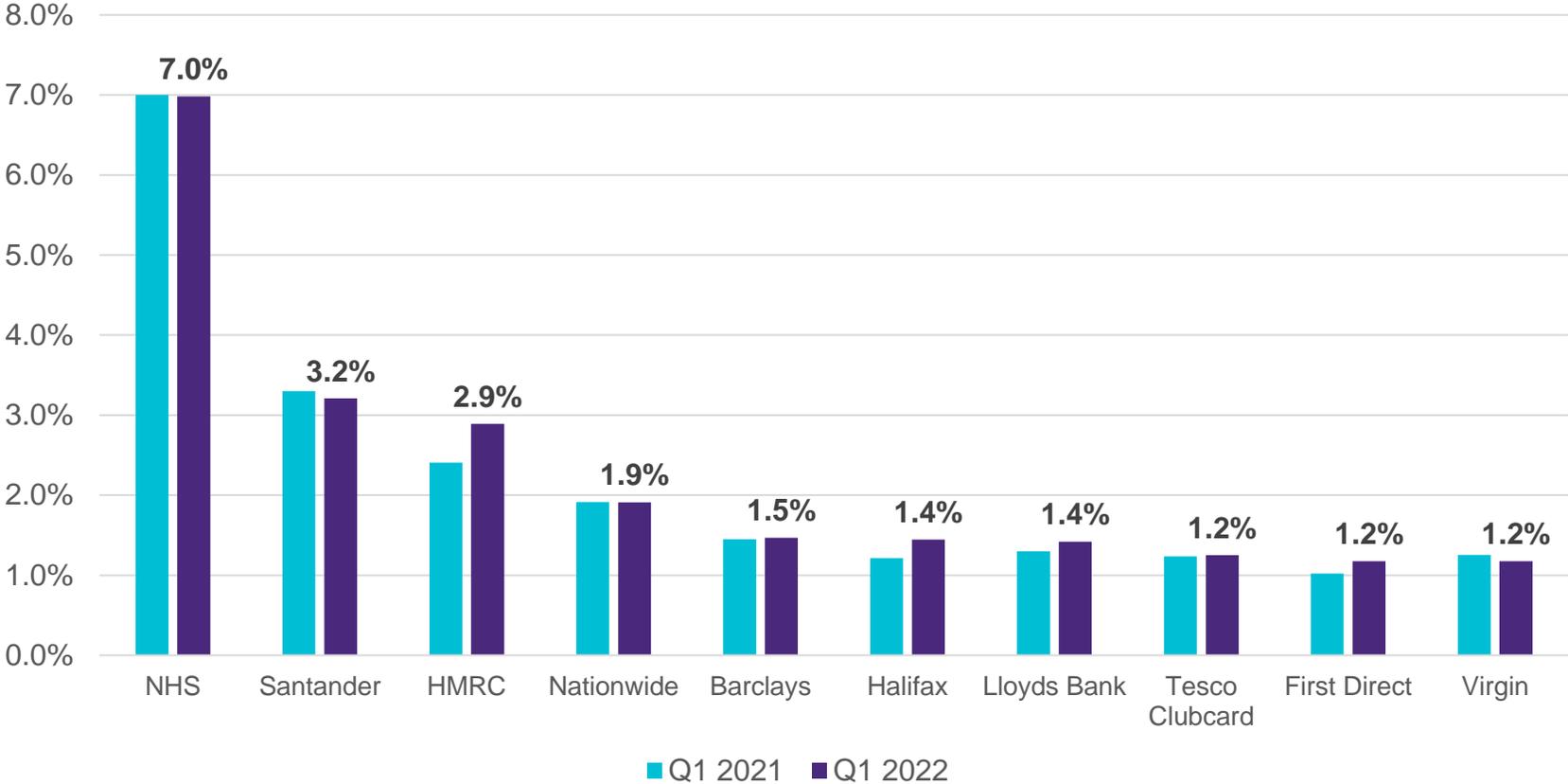
Total Door Drop share of door mat for the top 10 advertisers declined from 26% to 23% in Q1, indicating a slight rebalancing of volumes to the long tail of smaller Door Drop users

Share of Door Mat (% of Door Drop items)
Q1 2022 vs Q1 2021



The top 10 Business Mail advertisers account for nearly a quarter of all Business Mail volumes

Share of Door Mat (% of Business Mail items)
Q1 2022 vs Q1 2021



Source: JICMAIL Mail Item Database Q1 2021 to Q1 2022

What happened during Q1 2022?

1

Mail volumes are now in excess of pre-pandemic levels, signalling continued confidence in the mail channel.

2

The majority of key mail media metrics have remained stable year on year. New reporting variables for Partially Addressed Mail confirms that it has engagement and lifespan levels that sit between DM and Door Drops.

3

Mail effectiveness has been maintained at the impressive benchmarks set during the pandemic.

Thanks

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Mail Media Metrics