

JICMAIL Q3 2022

Key Results

November 2022

**JIC
MAIL**

Mail Media Metrics



1. Mail's importance in the home continues to grow

Record amounts of mail are being put on display in the home while mail retention also continues to grow

2. Mail delivers crucial messages as the cost of living crisis deepens

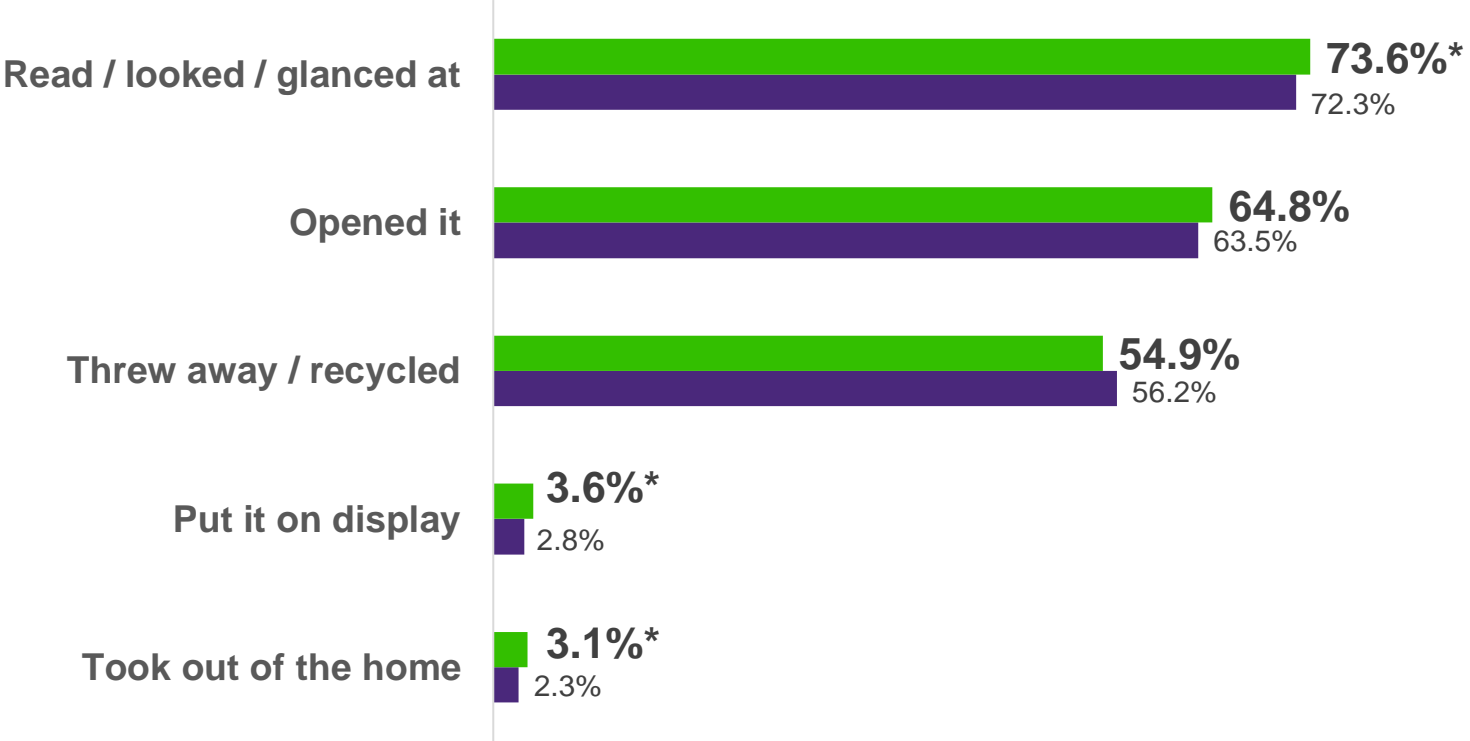
Consumers interact with special offers, notifications & reminders, and loyalty reward statements more than they did a year ago

3. The full funnel commercial effectiveness of mail continues to grow

Brand discussions, web visits and purchases prompted by mail have all increased year on year

Physical interaction with mail increased across a host of metrics in Q3 2022, while retention rates have improved for the second quarter running 3

Physical Actions (All Mail Types) % of mail items



1. Improvements in mail open and read rates

2. There has been a decline in the amount of mail being discarded for the second quarter in a row

3. Consumers are showing increased likelihood to put mail on display and take it out of the home

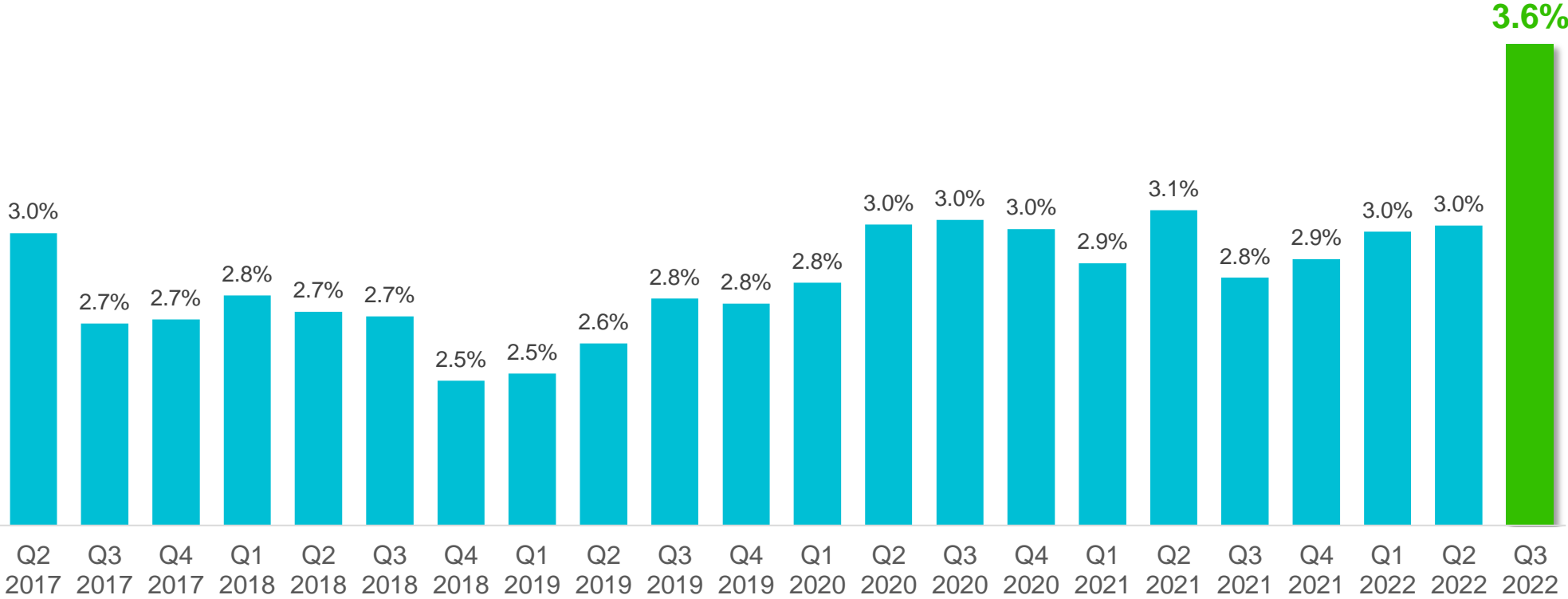


■ Q3 2022 ■ Q3 2021

Source: JICMAIL Item Data Q3 2022 n=9,942 mail items
 * Statistically Significant at 95% confidence level

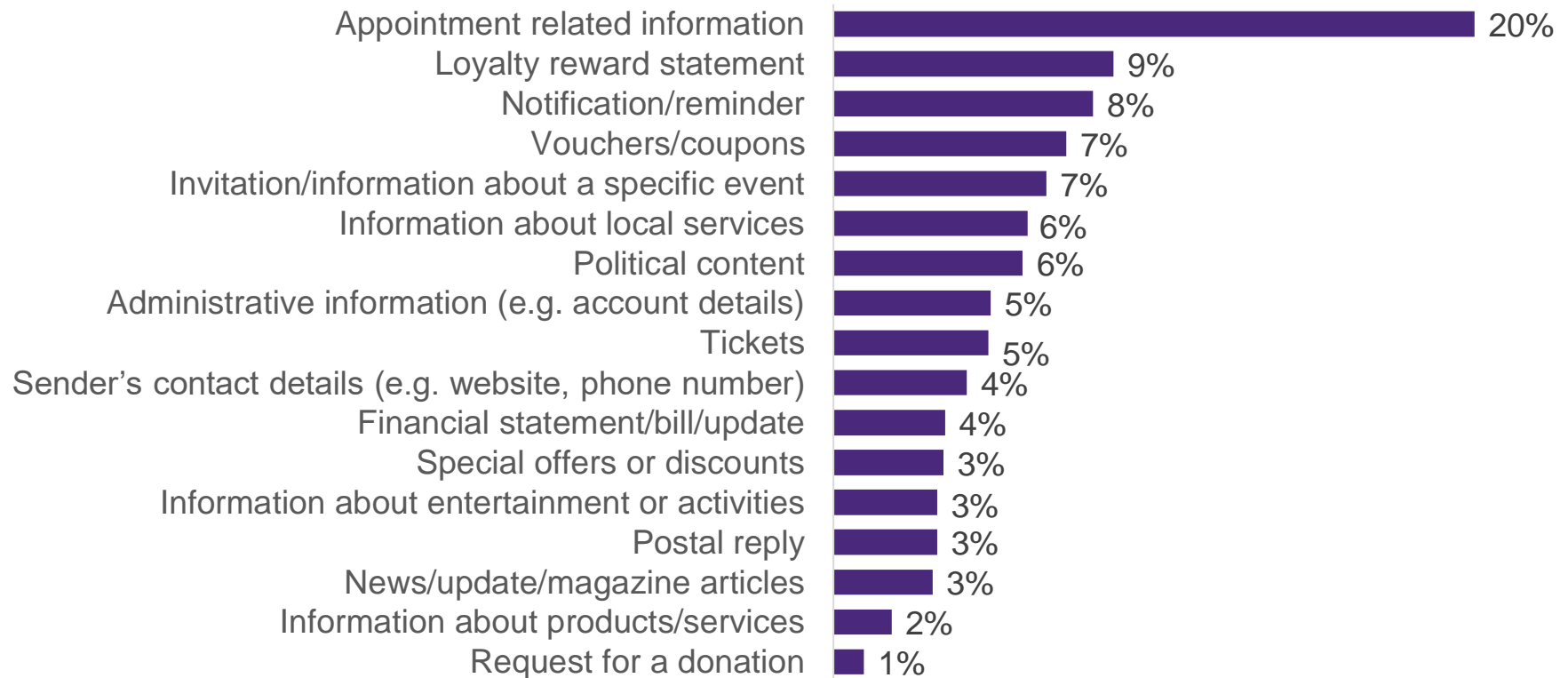
Record breaking levels of mail were put on display in the home in Q3 2022 – providing the potential to capture attention

% of mail put on display (e.g. on the fridge or noticeboard)



Appointment related information is most likely to be displayed in the home

Mail content most likely to be put on display in the home
(% of Direct Mail Items)



The cost of living crisis has seen increased engagement with a range of relevant mail content types



Door Drops
Special Offers
and Discounts

Frequency 3.4

+6.4% y-on-y



Direct Mail
Notification /
Reminder

Frequency 5.6

+8.2% y-on-y



Business Mail
Loyalty Reward
Statement

Frequency 5.5

+6.2% y-on-y

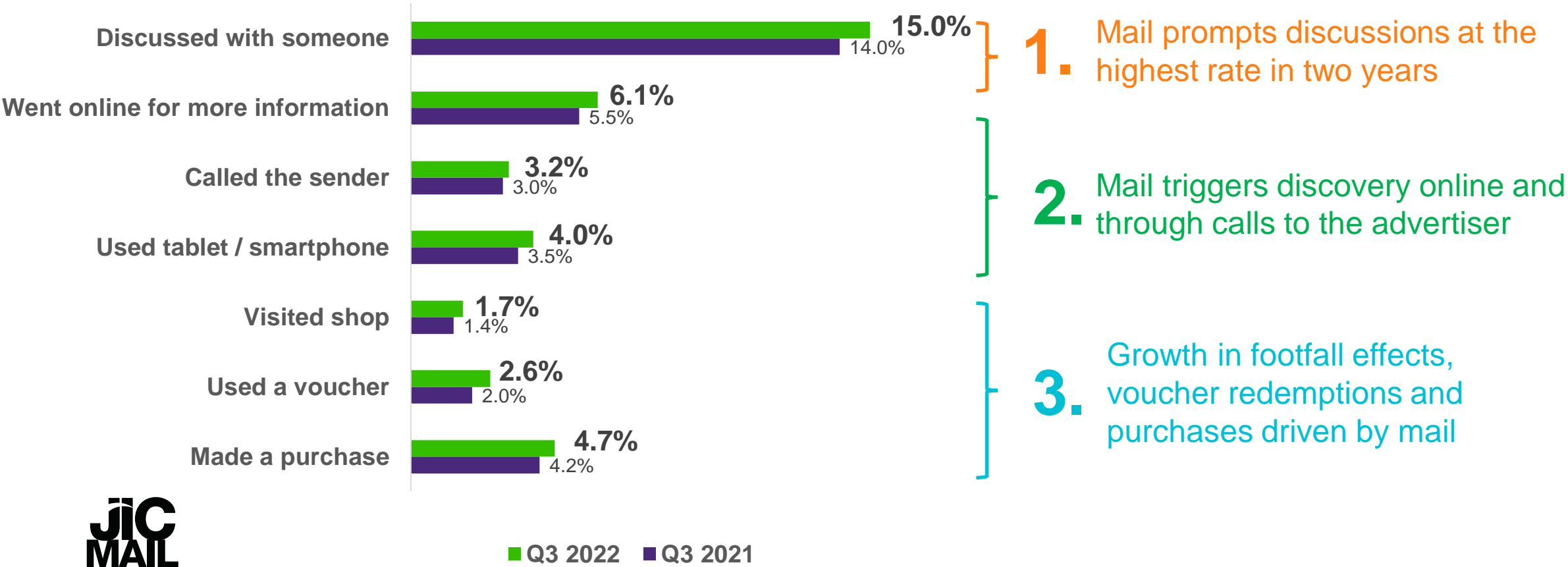


Mail Media Metrics

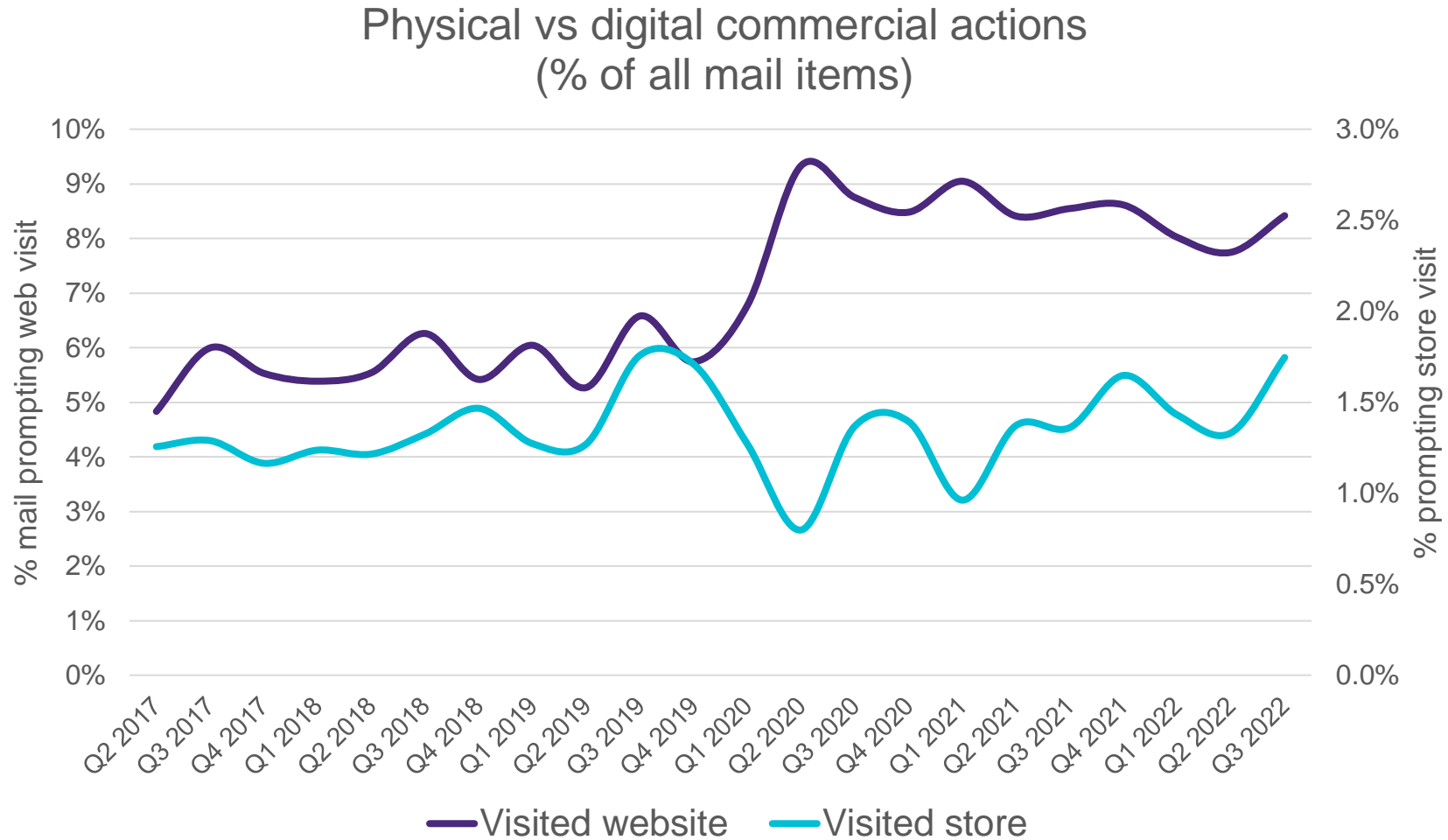
Source: JICMAIL Item Data Q3 2022 n=9,942 mail items

Year on year growth in the full-funnel effects of mail

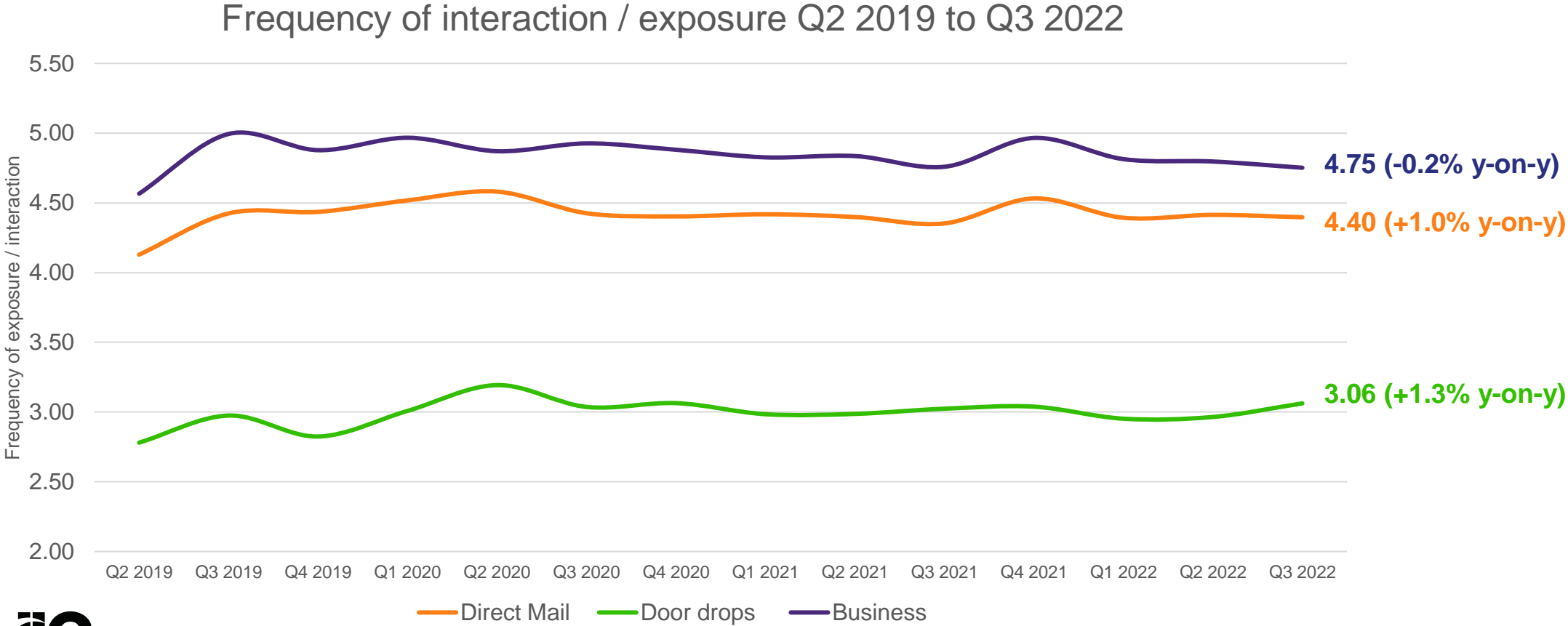
Commercial Actions (All Mail Types) % of mail items



The physical and digital effects of mail are both on the rise

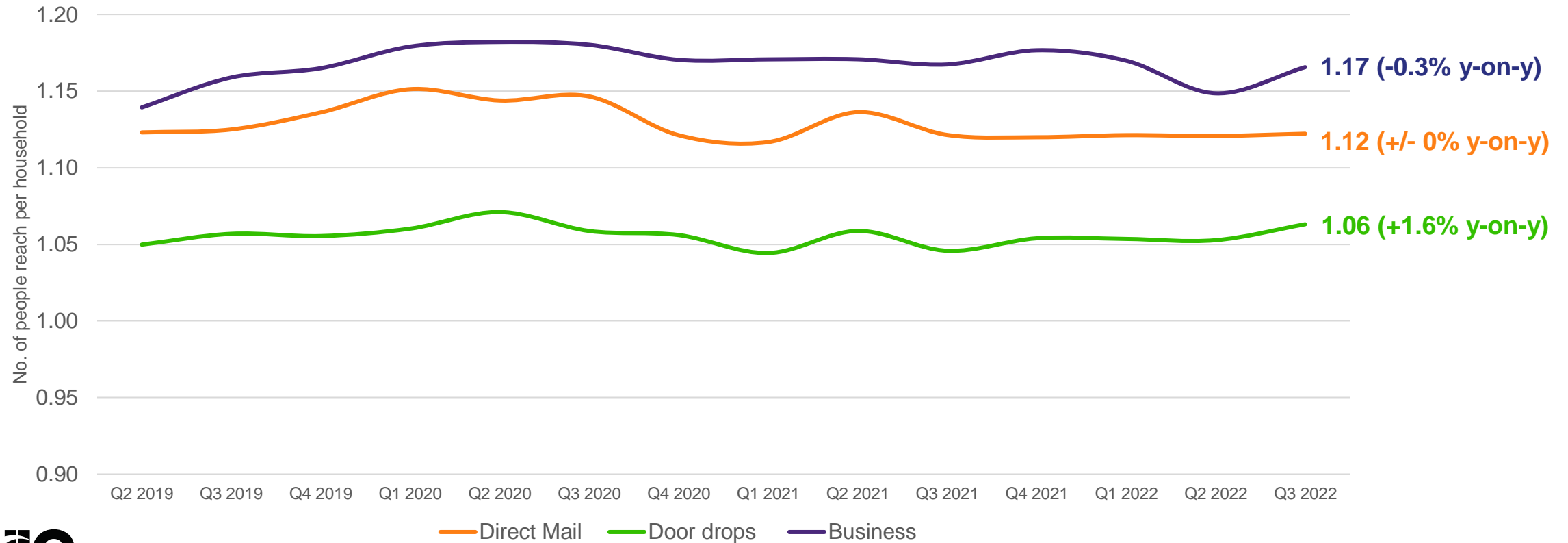


Frequency of interaction / exposure up marginally for Direct Mail and Door Drops

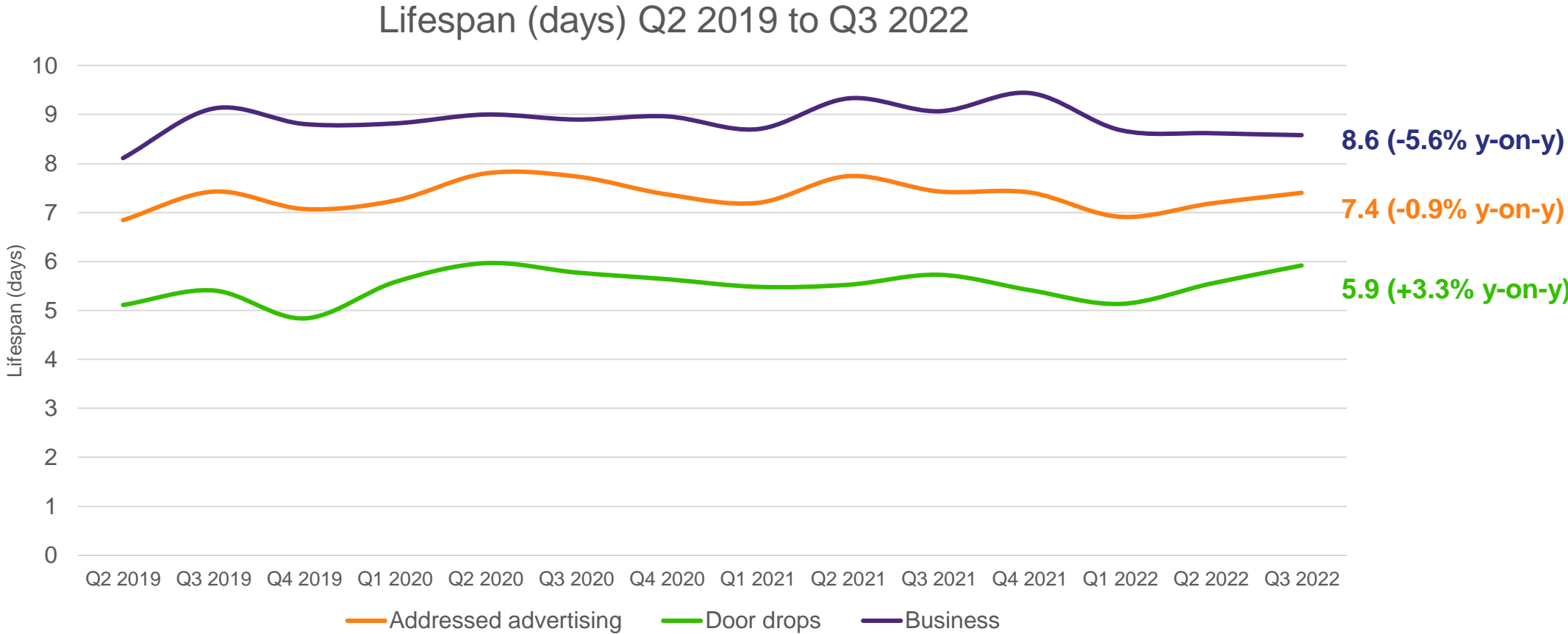


Mail sharing and therefore overall audience reach is stable year on year

Item reach in the household Q2 2019 to Q3 2022

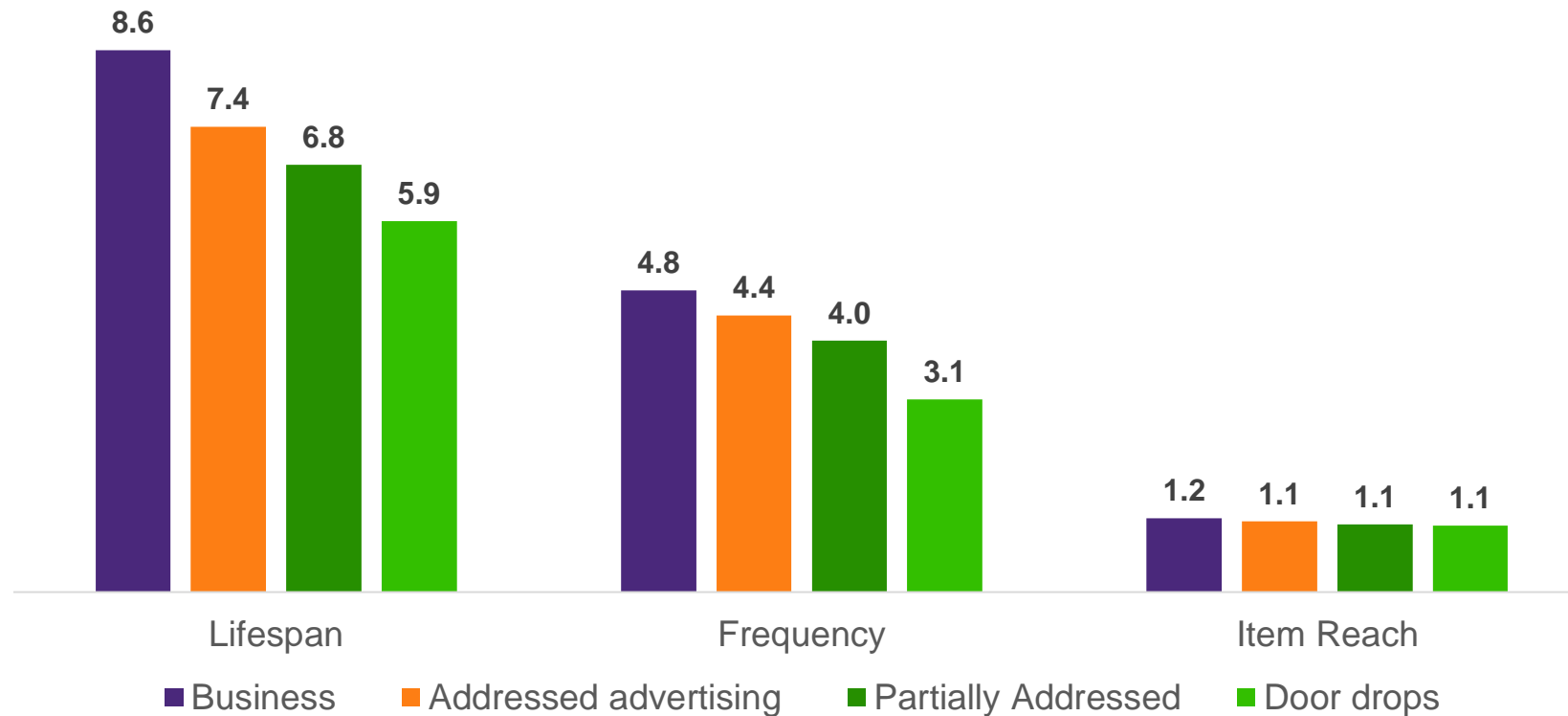


Door Drop lifespan up year on year, Business Mail down



Business Mail records the highest longevity and most consumer interaction overall however

Mail media metrics across key mail types
Q3 2022



Advertiser activity

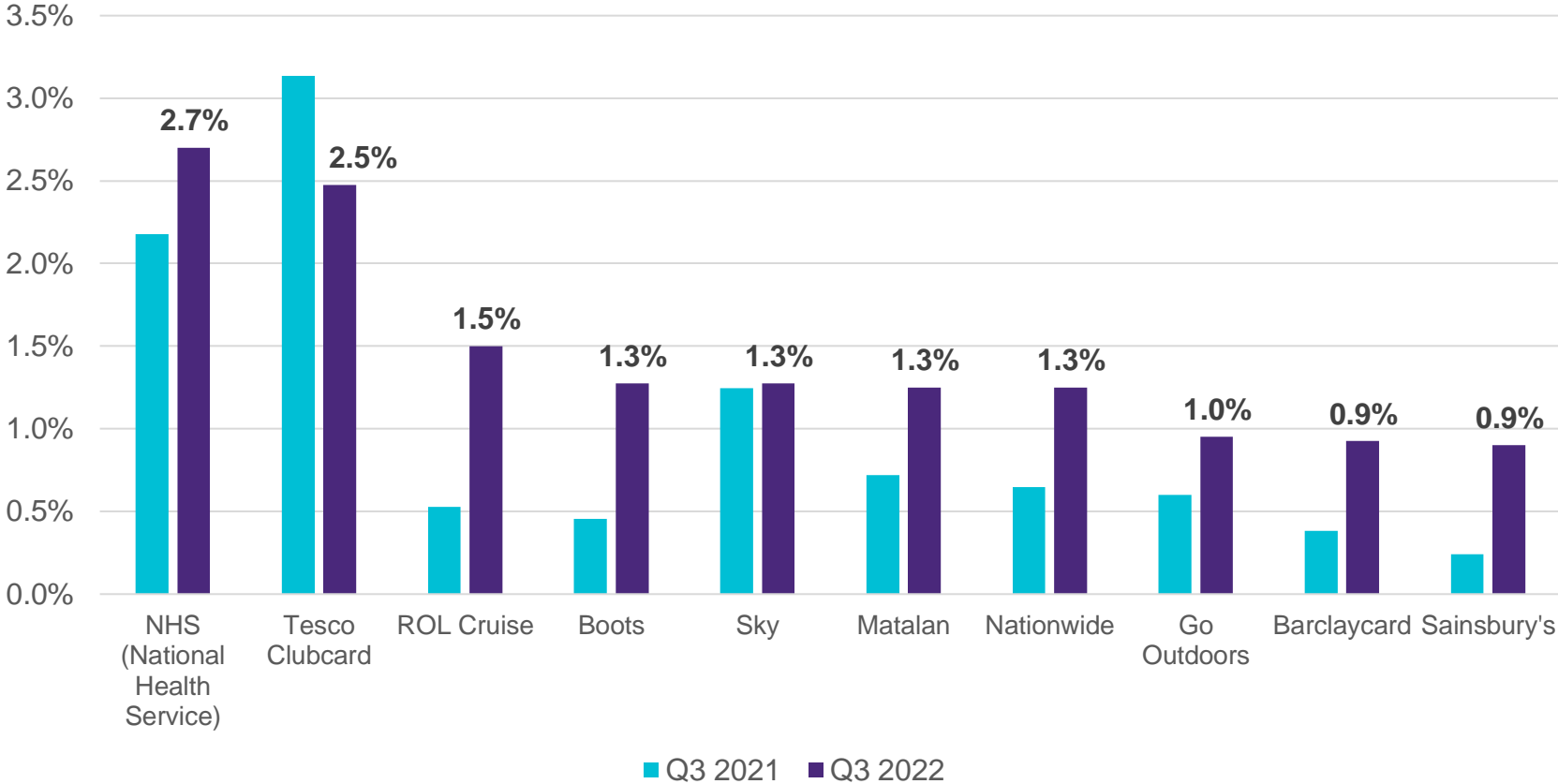
Q3 2022 Share of Door Mat



Mail Media Metrics

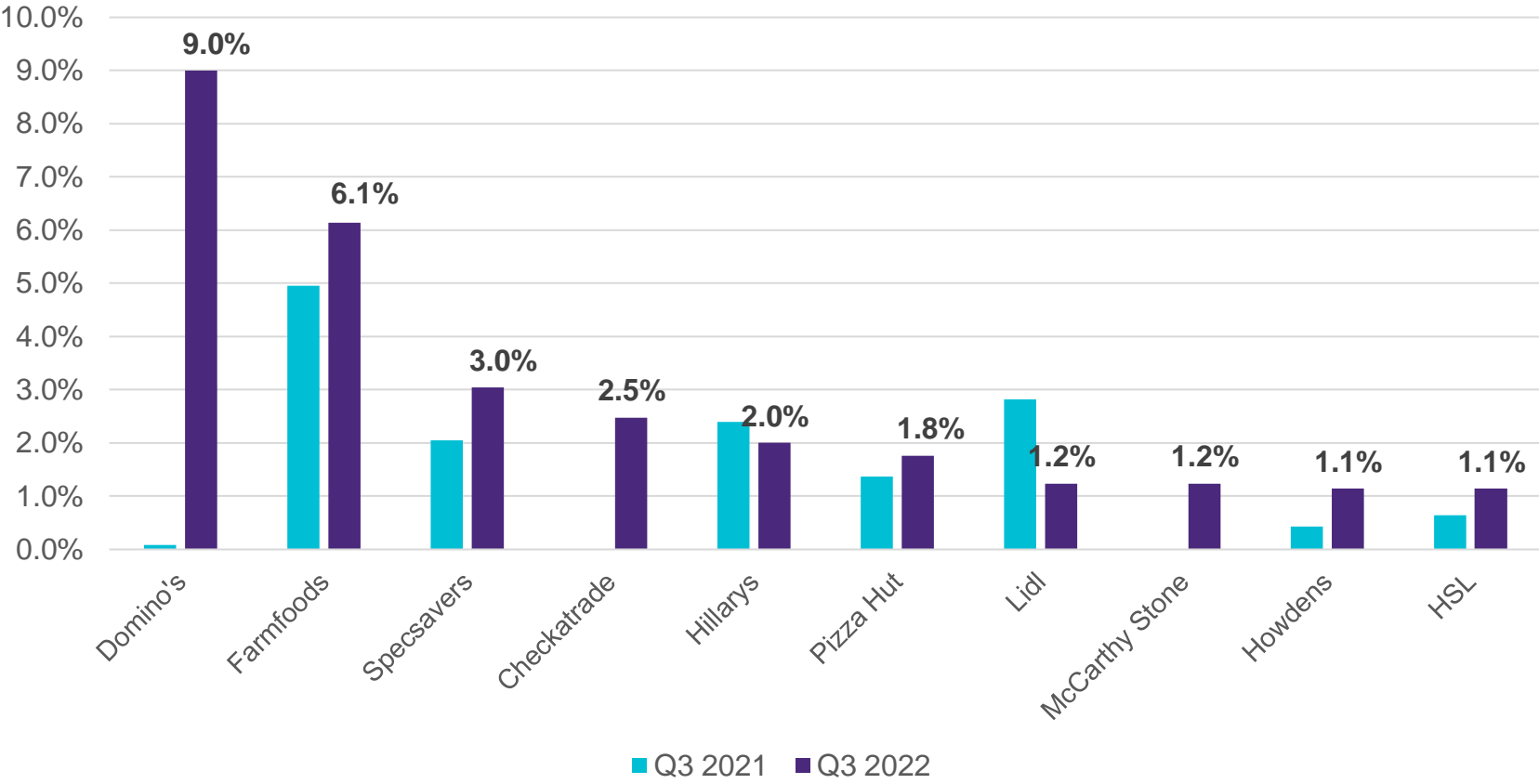
Nine out of the top ten DM brands increased their share of door mat in Q3 2022

Share of Door Mat (% of DM items)
Q3 2022 vs Q3 2021



Dominos Door Drop activity picked up considerably versus a year ago in Q3 2022

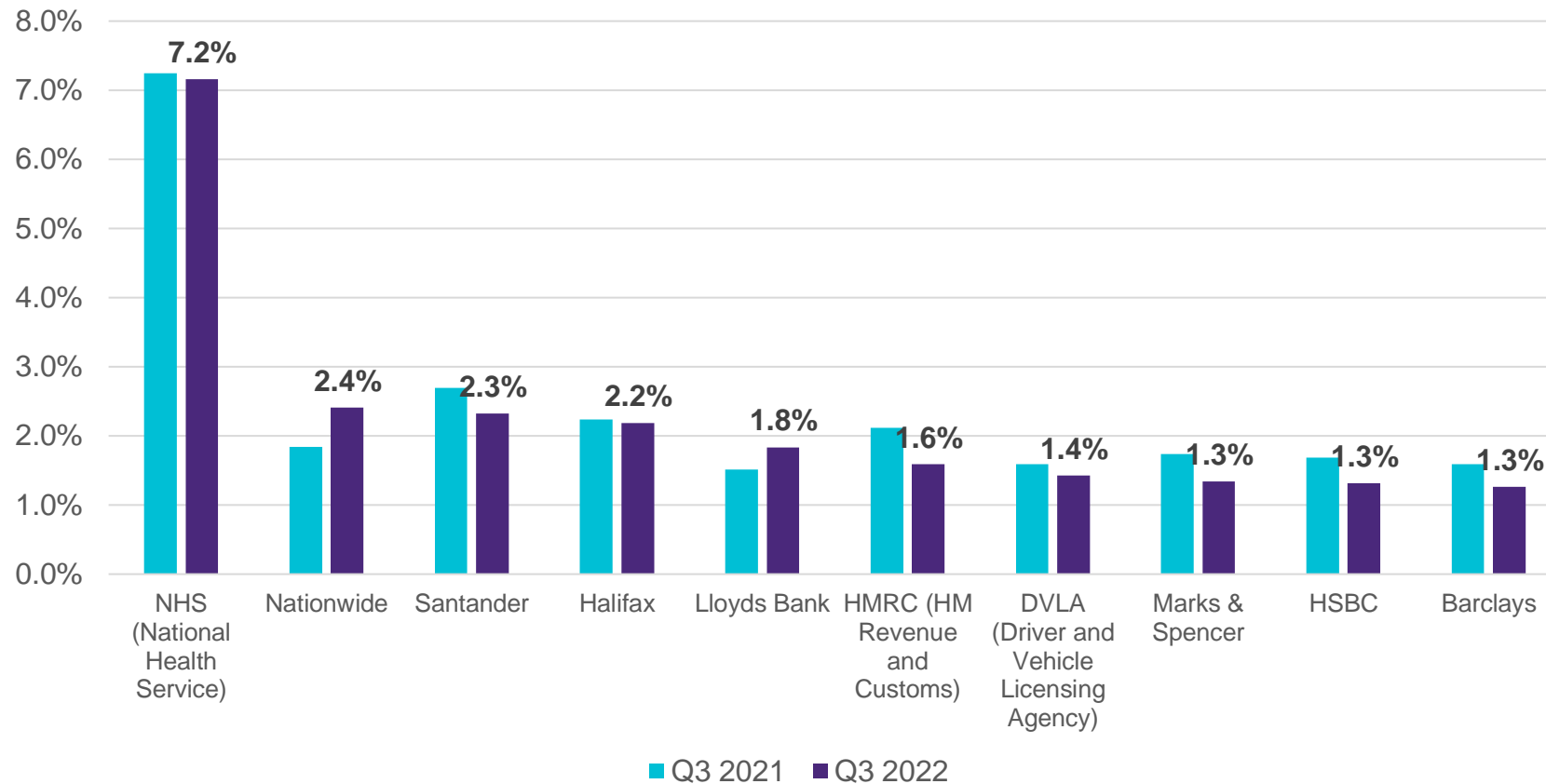
Share of Door Mat (% of Door Drop items)
Q3 2022 vs Q3 2021



Source: JICMAIL Mail Item Database Q3 2021 to Q3 2022

High street banks have kept their share of door mat broadly stable in the face of new consumer duty regulations

Share of Door Mat (% of **Business Mail** items)
Q3 2022 vs Q3 2021



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Thanks

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