Door Drop Report 2023

In partnership with

JIC MAIL
Mail Media Metrics

Intelligent Marketing

DMA
Data & Marketing Association

Contents

/ Introduction

A challenging environment for the economy invariably means a challenging environment for marketing spend. Not only has the Door Drop channel had to deal with these cyclical market factors in 2022, but at the same time it has also undergone the structural challenges of a continued shift of budgets towards digital channels.

The fact that Door Drop spend and volumes have been maintained year-on-year against this backdrop speaks to the continued confidence that advertisers place in the channel during tough times.

In partnership with JICMAIL, the DMA is pleased to reveal the latest performance metrics for the Door Drop channel, covering the full year 2022. While the robust levels of ad spend are positive for the industry, this report should also be seen as a rallying call to those brands which are currently missing out on the Door Drop opportunity:

1. **Door Drops drive campaign effectiveness throughout the customer journey.** While they are invariably used as a powerful acquisition tool, they also drive digital actions, website visits and brand conversations.

2. **Door Drops reach a broad range of target audiences.** Other than budget and planning best practice there is no limit on the types of households that can be targeted. Upmarket audiences are just as likely to interact with Door Drops as less well-off audiences, while under-35s are more likely to interact with the channel than any other age group. At the same time, they are the least likely group to be targeted by advertisers, creating huge short-term share-of-voice opportunities for brands.

3. New insight from JICMAIL also reveals that **Door Drops are among the most attention-efficient media channels** out there, costing just 7p to deliver a minute of consumer attention. In an era of media saturation and ad avoidance, this type of consumer interaction is invaluable to campaign planners.

The DMA and JICMAIL would like to thank the DMA Print Council's Door Drop Hub for its support and guidance in creating this report. We'd also like to thank those organisations which contributed anonymised Door Drop market data without them this industry report would not have been possible.

We hope you enjoy the read. Please get in touch with any comments or questions.

Ian Gibbs
Director of Data Leadership and Learning, JICMAIL

Director of Insight and Planning, Data & Marketing Association

Foreword – Print Council's Door Drop Hub

We're pleased to see that despite the challenging market conditions in the second half of 2022, volume and spend has held steady following the previous year's post-Covid recovery. Thanks to JICMAIL data, we can understand more about annual volume trends throughout the year as well as reviewing the annual total. Going back to Q1 2022, Door Drop volumes were at a three-year high and we were seeing a continuation of the performance that we enjoyed in late 2021. As the year went on, several challenges presented themselves; some specific to print industries and others that affected the wider advertising market.

1. Paper availability and prices became an increasingly significant factor for clients, leading to some businesses choosing to reduce their volume but maintain spend, whereas others had to postpone activity.

2. One of the channel's key delivery routes via Royal Mail started to become affected by industrial action. While this had minimal impact on the actual delivery of material, the media headlines and issues with postal services inevitably affected client confidence.

3. We then saw a wider market impacted by falling consumer confidence, particularly around Q3 with significant policy changes in central government but also the increasing impact of the energy crisis and war in Ukraine. This had a dual effect of squeezing consumer spending and increasing the industry's production costs.

These occurrences, alongside the ongoing challenges of high inflation, the rising cost of living and multi-sector strike action, are likely to have had noteworthy impacts on advertising spend and the use of Door Drops. All of these factors meant that 2022 was very much a year of two halves for Door Drop and the wider advertising industry.

In many cases, clients were actually spending more of their budget on the Door Drop channel, but with Royal Mail Door to Door prices stable year-on-year, that extra spend will cover print costs; not reflected in this report's findings.

This is the second DMA Door Drop Report that includes JICMAIL analysis alongside DMA member data and there are again some fascinating insights. For the first time ever we are beginning to understand how Door Drop's attention efficiency compares with other channels. JICMAIL's pilot study has shown Door Drops to be more cost effective in terms of time spent than almost every other channel, and we're looking forward to seeing more of this data as the year progresses.

Examining the share of doormat data, it is delightful to see so many sectors' use of the channel on the up. More sectors are increasing their use of the channel than those decreasing, which is a great sign as we move through 2023.

The channel is performing well and with issues around paper prices, industrial action and instability in government seemingly behind us, we're hopeful of seeing confidence return during 2023 so that even more clients are in a position to take advantage of Door Drop performance. Recent years have shown us that predictions are tricky to say the least, but if projections for inflation to fall into 2024 are accurate then 2023 may bring a reverse of what we have seen in this report; with volume and spend growing once again.

DMA Print Council Door Drop Hub

Acknowledgements

A special thank you to the DMA Print Council's Door Drop Hub for its expertise and support. Contributors and members of the hub include:

- Neal Dodd, The Letterbox Consultancy (Chair)
- Christian Petersen, Royal Mail
- Jayne Raynsford, Whistl
- Tom Malins, McCarthy and Stone
- Nick Brown, Newsquest
- Mark Graham, Smart Distribution Solutions

/ Exec Summary

OVERVIEW

1. Overall, the 2022 data suggests that the Door Drop channel has held up well in a difficult advertising market. Volumes and value were virtually flat year-on-year, and only hampered by availability of paper, production cost increases following the energy crisis, and Royal Mail strikes affecting advertiser confidence.

INDUSTRY - KEY FINDINGS

2. Annual expenditure on Door Drops has remained virtually flat year-on-year at a level of £181.2m - Door Drop volumes also held up relatively well at a level of 3.53 billion in 2022.

3. Continuing the upward trend seen in recent years, the majority of Door Drops sent in 2022 were leaflets (89.2%). In parallel, the proportion of envelopes and booklets both reduced slightly year-on-year.

4. Purchase-related effectiveness and the prompting of online actions by Door Drops, along with the effect of stimulating consumer conversations about brands, stayed stable year-on-year, despite a small decline in Q4.

5. The average time spent reading a Door Drop by consumers across 28 days is 46 seconds. This equates to £0.07 per minute of attention: the best result, matched only by Out Of Home.

HOUSEHOLD - KEY FINDINGS

6. Door Drop volumes have stayed flat year-on-year, at 2.42 units received per household per week.

7. Door Drop sample sizes on the JICMAIL panel were also virtually flat, decreasing by just 0.9% year-on-year. Volumes were stable in Q1 and Q2 but slumped in Q3 due to conditions such as paper scarcity mentioned above.

8. As of Q4 2022, the average Door Drop was shared with 1.05 people per household (referred to as Item Reach), reflecting an additional 5% audience reach on top of campaign volumes. In addition, the average person in the UK interacts with each Door Drop 3.1 times a month.

/ Industry

In this section, we will share the latest industry insights for Door Drops – including the spend and volume of the industry, the share of doormat figures, and long-term trends across both the DMA's and JICMAIL's datasets.

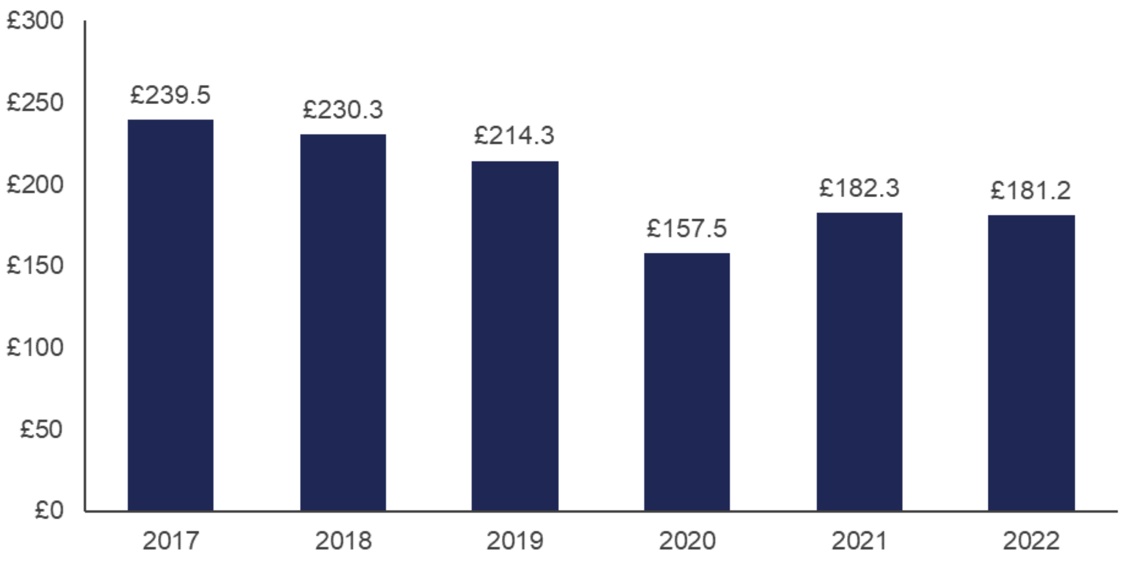
Spend and Volume

Annual expenditure on Door Drops reduced only slightly - by around £1.1m to £181.2m - year-on-year. Given rising paper costs during 2022, client spend on Door Drops increased significantly compared to previous years, but expenditure on printing is not reflected in these figures. In parallel, Door Drop volumes also held up relatively well, reducing by a minor amount from 3.54 billion to 3.53 billion year-on-year. It's also worth noting that a better performance in the first half of 2022 was counter-balanced by a drop off in the second half of the year as economic conditions deteriorated.

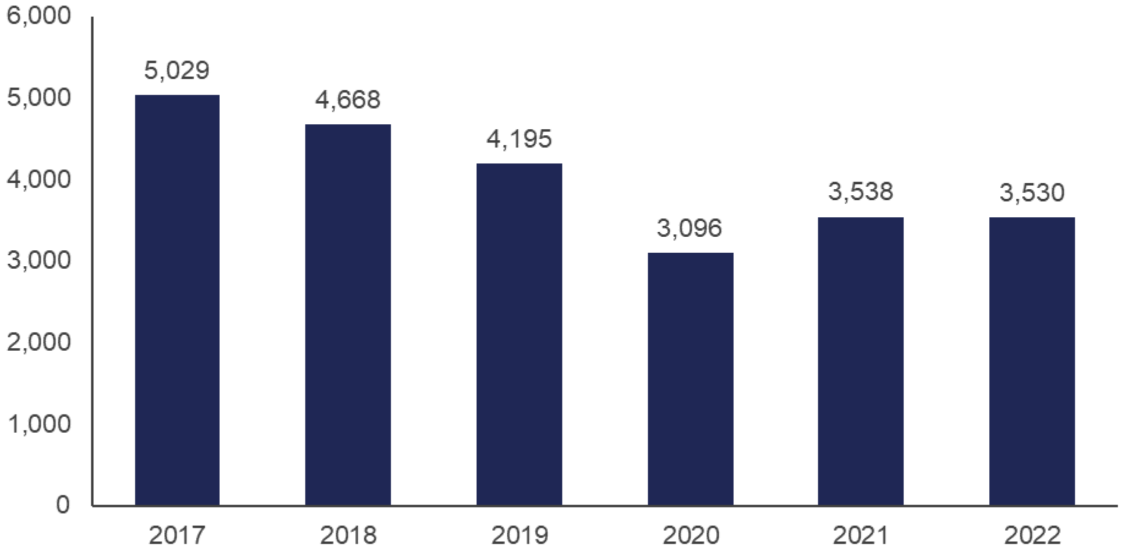
Achieving more or less flat expenditure and volume figures in tough economic times represents a steady performance and can be viewed as a positive. Moreover, Royal Mail prices continue to remain at their 2018 level. Compared to the 4.5% media cost inflation reported in other channels on average, Door Drops have remained good value for brands seeking media efficiencies in 2022.

Another longer-term trend that has impacted Door Drop volumes is the rising cost of paper, resulting in some brands opting to send less in terms of format, weight, or volume. It should be noted these costs had begun to fall at the time of publishing this report. In addition, there is a positive effect to consider as better campaign planning and targeting has also reduced the volumes of wasted paper. Indeed, environmental standards, such as ISO 9001 and ISO 14001, are the norm and the sector continues to work to collectively tackle the issue of waste.

Yearly expenditure (millions of pounds)



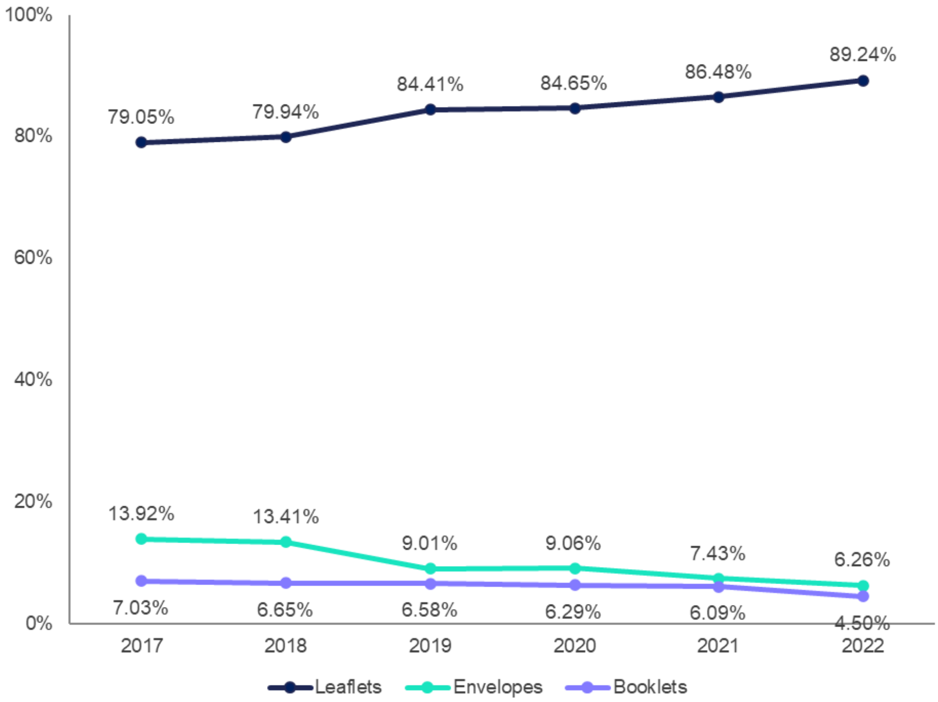
Yearly volumes (millions of units)



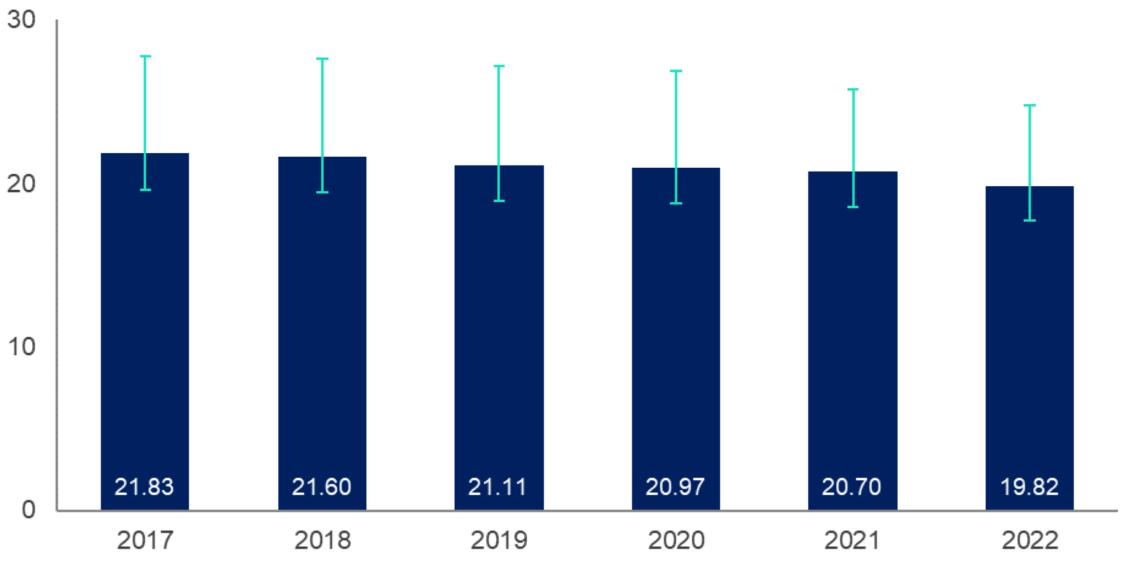
Total Material

Continuing the upward trend seen in recent years, the majority of Door Drops sent in 2022 were leaflets (89%). In parallel, the proportion of envelopes and booklets both reduced slightly year-on-year. These shifts could well be the result of cost-based printing decisions - anecdotally, grocers and other retailers cut seasonal brochure sizes - and contribute to an overall minor decrease in the average weight of each item to 19.82g, also continuing a downward trend seen over the past six years.

Percentages of Door Drop material by category



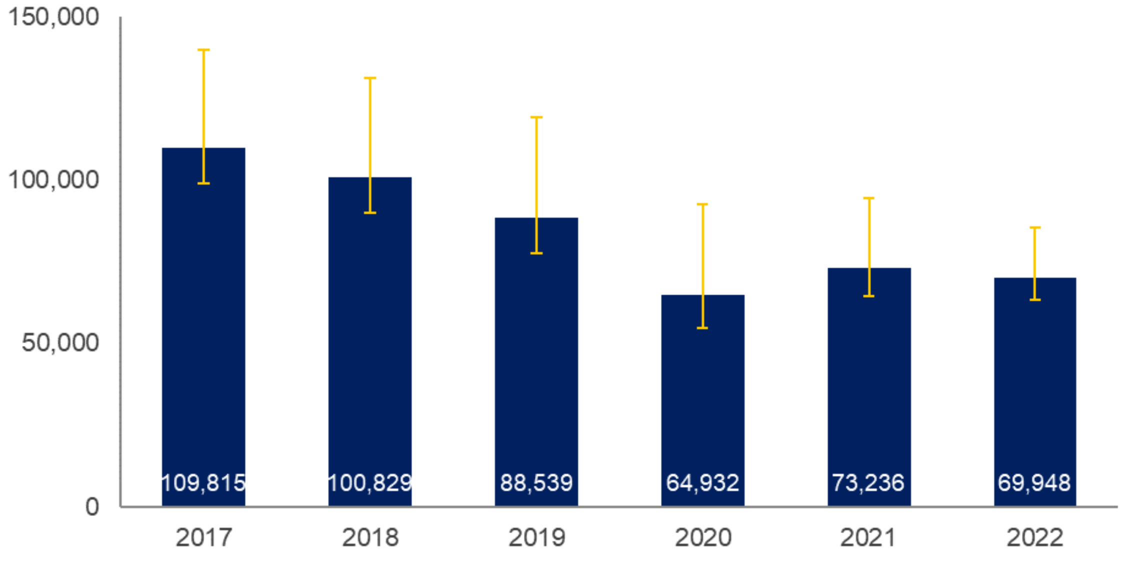
Average estimated weight of a Door Drop (grams)



No matter the format being sent, these items have the tactile influence to inspire customers like no other channel. A look at the latest history of DMA Awards winners in 'Unaddressed Print' showcases the effectiveness and power of the medium. Meanwhile, JICMAIL's data not only shows engagement, but its 'Mail Item Database' offers a host of examples of how consumers are interacting with specific mail items too.

Overall, the total weight of material that Door Drops account for has fallen again after increasing in 2021. Advertisers are compensating for higher paper and printing costs by using lower-quality and more lightweight paper.

Total Door Drop material (metric tonnes)



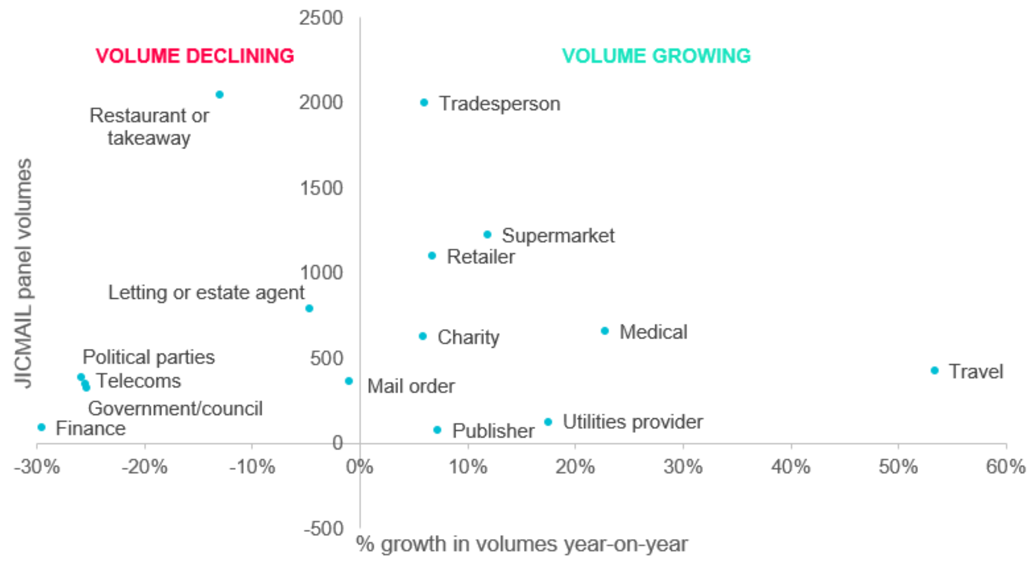
Share of Doormat (Sectors)

The chart below provides a perspective on the key advertiser sectors responsible for Door Drop volumes in 2022, with overall JICMAIL volumes for the year plotted on the vertical axis and year-on-year growth on the horizontal axis. Roughly the same amount of sectors have seen volumes increase vs decrease in 2022. While the volumes of travel Door Drops, for instance, are small enough to have little impact on overall growth, the decline in restaurant/takeaway volumes has had more of an effect on growth rates.

Overall, however, this was easily compensated by some larger sectors that experienced modest double-digit growth (supermarkets were around +10%) and others with smaller increases, but plenty of potential opportunity to grow volumes (such as local and national tradesperson e.g. Checkatrade or Screwfix Door Drops). Meanwhile, tech start-ups and direct-to-consumer brands are also using the channel as they search for the audience reach so vital for scaling their businesses rapidly (e.g. Deliveroo, Oddbox, AO.com and Who Gives A Crap? to name but a few). Despite the sector being dominated by digital, it appears that app/web-based businesses still rely on the power of print.

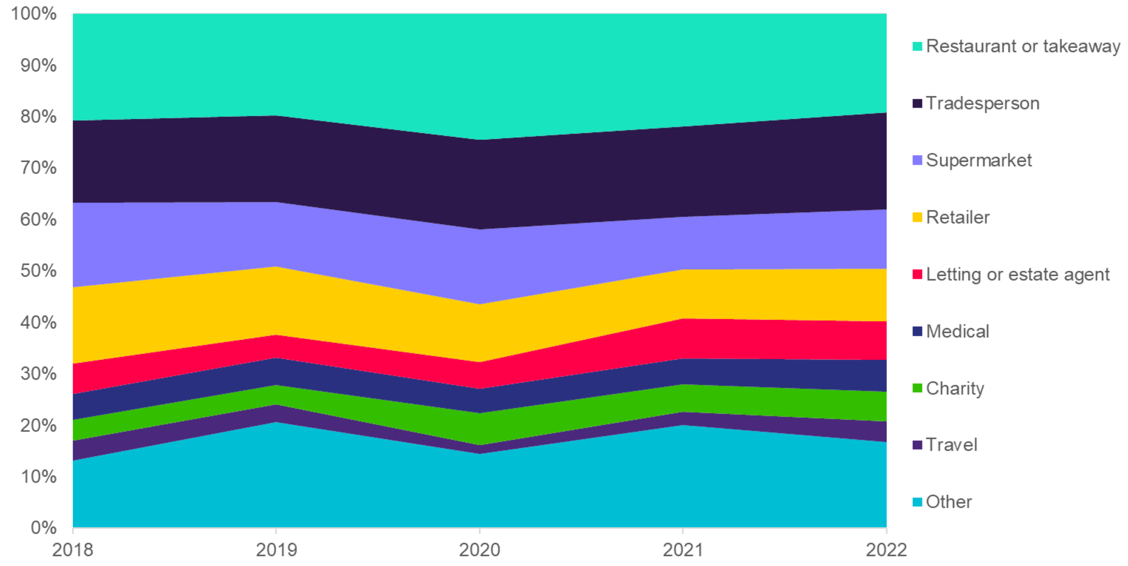
The growing use of the Door Drop channel among multiple, diverse sectors is indicative of it offering flexibility and effectiveness - even in an era dominated by digital advertising. The days of major Door Drop-using brands distributing hundreds of millions of them every year may be gone, but the client base using the medium is now much bigger and more widespread. This makes it a resilient, sustainable, attractive option - with proven effectiveness and consumer engagement. In effect, the Door Drop channel has redefined itself for its user base; it's now harnessed much more strategically than may have been true not so long ago.

Door Drop advertiser sector growth (2022)



As in 2021, the top three advertiser sectors in the Door Drop channel (restaurant / takeaway, tradesperson and supermarket) accounted for around half of all Door Drop volumes in 2022.

Advertiser Sector Share of Door Drop Panel Volumes

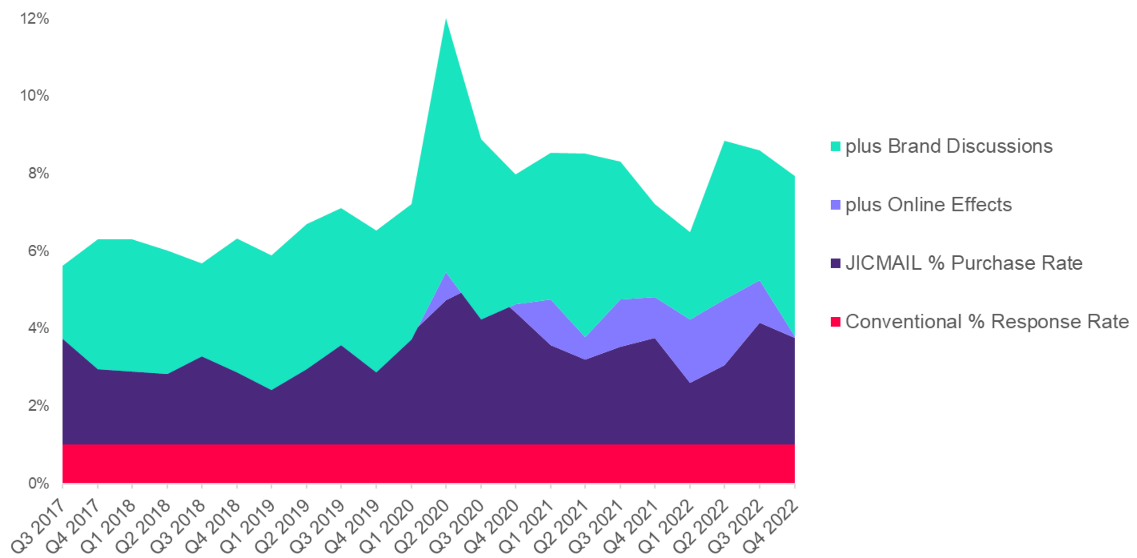


Effectiveness

The chart below imagines a hypothetical, but realistic, 1% response rate attributed to Door Drops, tracked by conventional means. JICMAIL attributes a broader range of purchase effects to the channel. However, effects that relate to consumers' own self-reported purchase behaviour (e.g. where a voucher or unique tracking code may not have been used), claimed voucher usage, or in the case of high-consideration purchases (such as holidays and cars), consumer intention to at least plan a large purchase. Once this fuller basket of purchase measures is taken into account, the purchase rate is typically four times higher than a conventional response rate.

Door Drops increasingly prompt product, service and brand discovery online – even when they don't impact an immediate sale. In addition, they drive discussions between consumers, promoting advocacy and extended reach. Q2 to Q4 2022 were especially strong for Door Drops prompting brand discussions. Ultimately, Door Drops have effects far earlier in the customer journey than they are traditionally credited with.

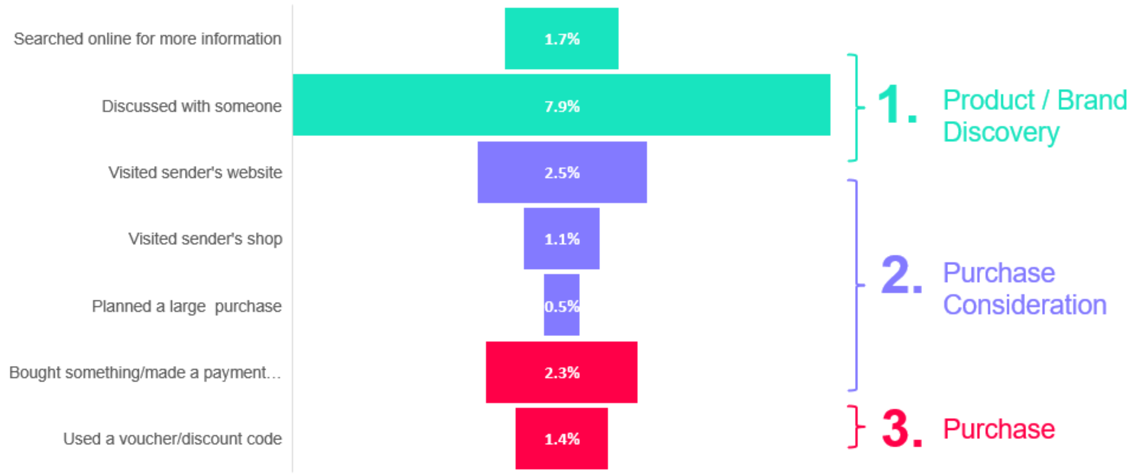
Door Drop commercial actions (% of items)



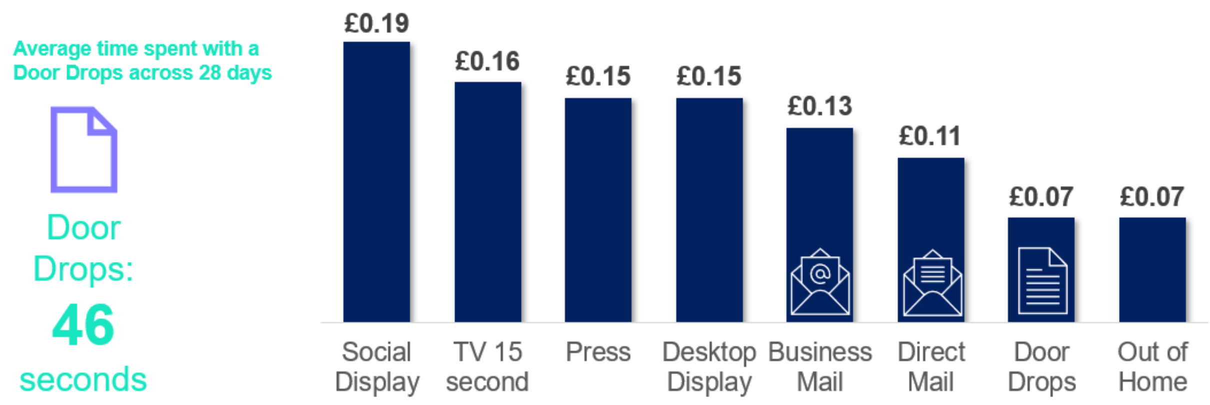
It was encouraging for the channel that up until Q4 2022 purchase-related effectiveness and online actions, along with being the starting point of consumer conversations, stayed stable year-on-year. Following the pandemic, although many people have returned to their place of work a growing number have hybrid roles - 24% of UK-based employees in May 2022, according to official figures - meaning they are at home to pick up the mail from their doormat during the day. This is another potential boost for the Door Drop channel.

Door Drop is clearly an offline channel with an online effect. Understanding this trend will help improve attribution models, and result in the more accurate assigning of effectiveness credit and campaign budget. Hence we conducted further analysis of commercial actions (below). The results are positive news for the channel: Door Drops are useful for driving full-funnel effectiveness.

Door Drop Commercial Action (% of mail items)



Door Drop Attention Efficiency



In addition JICMAIL has this year released a mail attention study, quantifying the amount of time consumers spend looking at mail.

As part of the research, a consumer panel was asked to record how long they read mail. Every time they interacted, they estimated the amount of time spent reading it. Alongside PwC the raw data was developed into cost-efficiency metrics: the cost of generating a minute's-worth of attention (this was calculated across each channel included in the study.)

As the chart displays, the average time spent reading a Door Drop by consumers across 28 days is 46 seconds. And this equates to £0.07 per minute of attention: the best result, matched only by Out Of

Home.

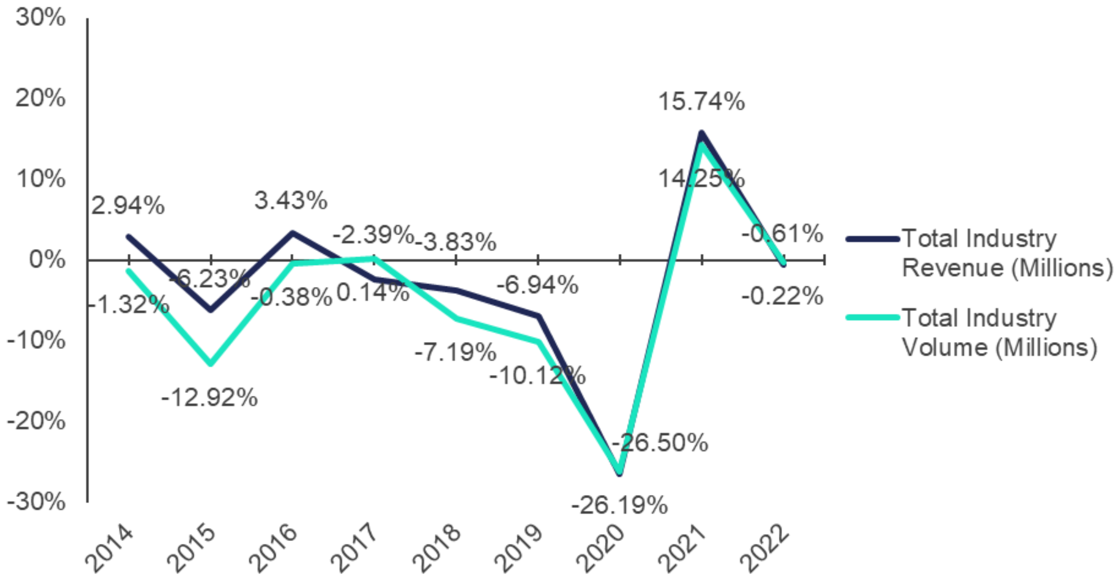
In an era when human interaction with brands can no longer be assumed, and ad avoidance is pervasive, the ability of the Door Drop channel to demonstrate that the channel holds consumer attention - alongside the effectiveness and efficiency metrics outlined earlier - is invaluable.

Overall, the 2022 data suggests the medium remains robust, and should be considered a key part of the marketing mix.

Long-term Trends

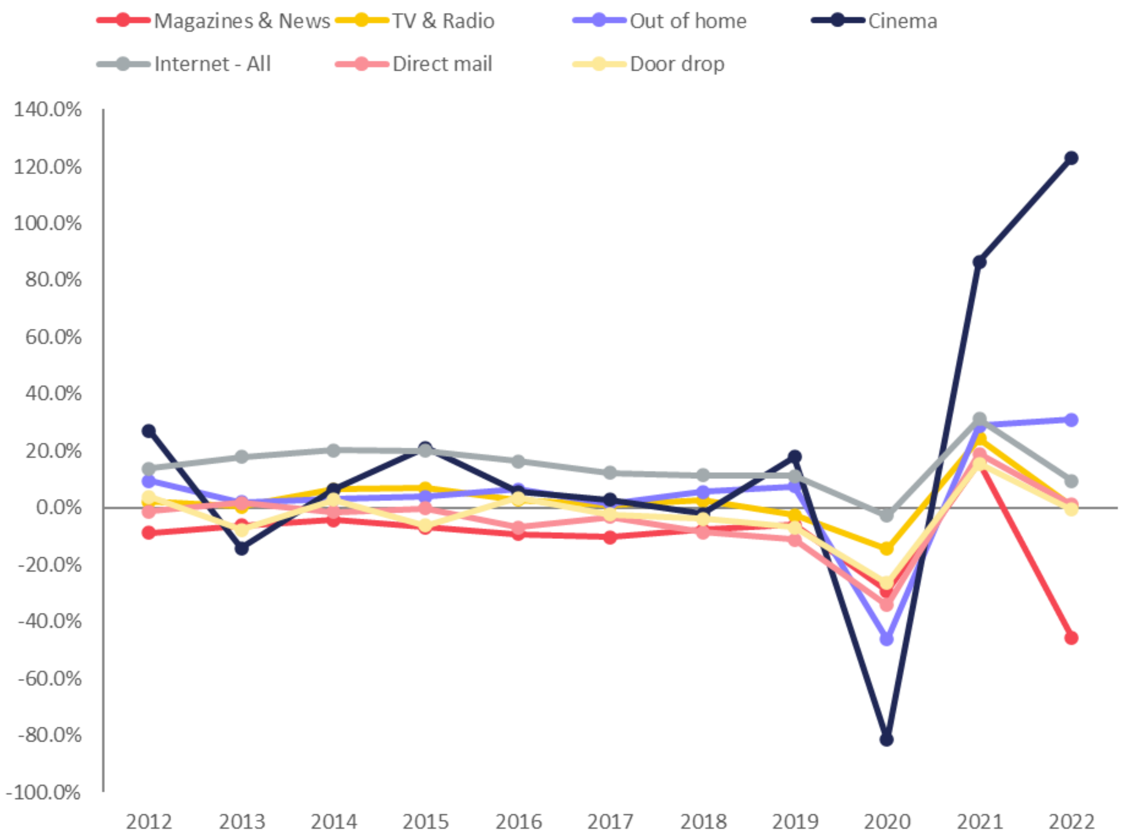
Looking back over the historic figures the DMA reports each year, it's clear that it has been a challenging decade for Door Drops – even before the unprecedented events of recent years. Indeed, this rollercoaster continued to some extent in 2022, with declines - albeit small - in the figures for both revenue and volume, taking the shine off a strong first half of the year and an improved 2021.

Change in year-on-year expenditure and volume

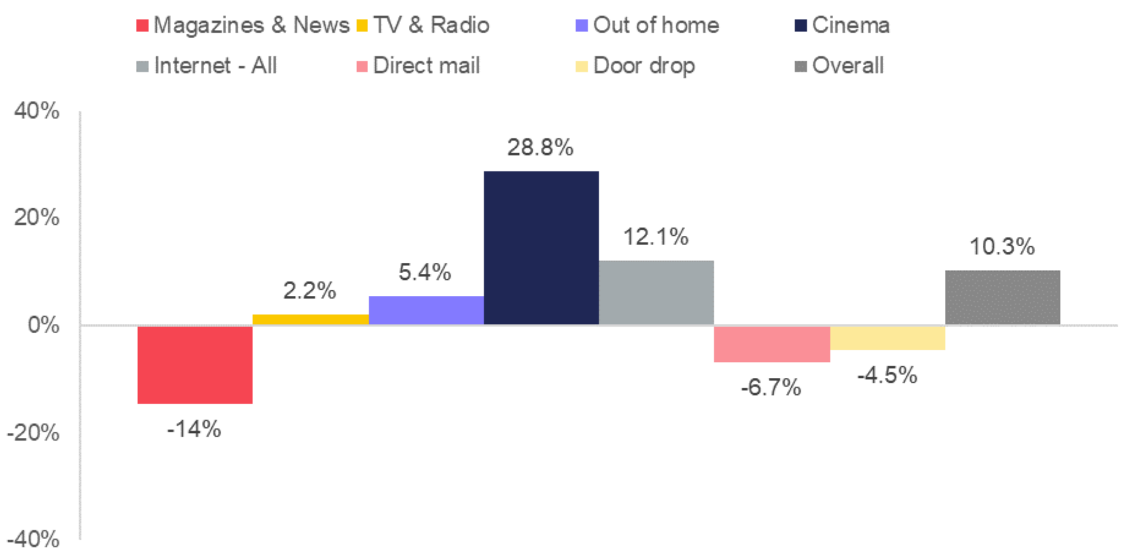


The latest [Advertising Association/WARC Expenditure Report] figures for 2022 show positive marketing spend growth across media. There was an overall 8.8% increase in ad spend. While digital continues to take share annually, other channels that show significant growth - including Out Of Home and Cinema - have largely done so as a result of 'course correction' following declines during the pandemic. Against other print channels, namely national newsbrands and direct mail, Door Drops are holding up well.

Change in year-on-year expenditure of Door Drops and other media



Five-year average change in year-on-year expenditure of Door Drops and other media



/ Household

In this section, we will focus on who is receiving Door Drops, how many, what they're receiving and how they're engaging with the medium. Insights come from both the DMA's annual industry data and JICMAIL's consumer panel.

Volume Received

The DMA's estimate for the number of Door Drops per household are calculated using data from the Office for National Statistics, which suggests there are around 28.1m households in the UK as of 2021. (While the Royal Mail number is significantly higher, for the purposes of year-on-year comparisons the ONS figure has been used.)

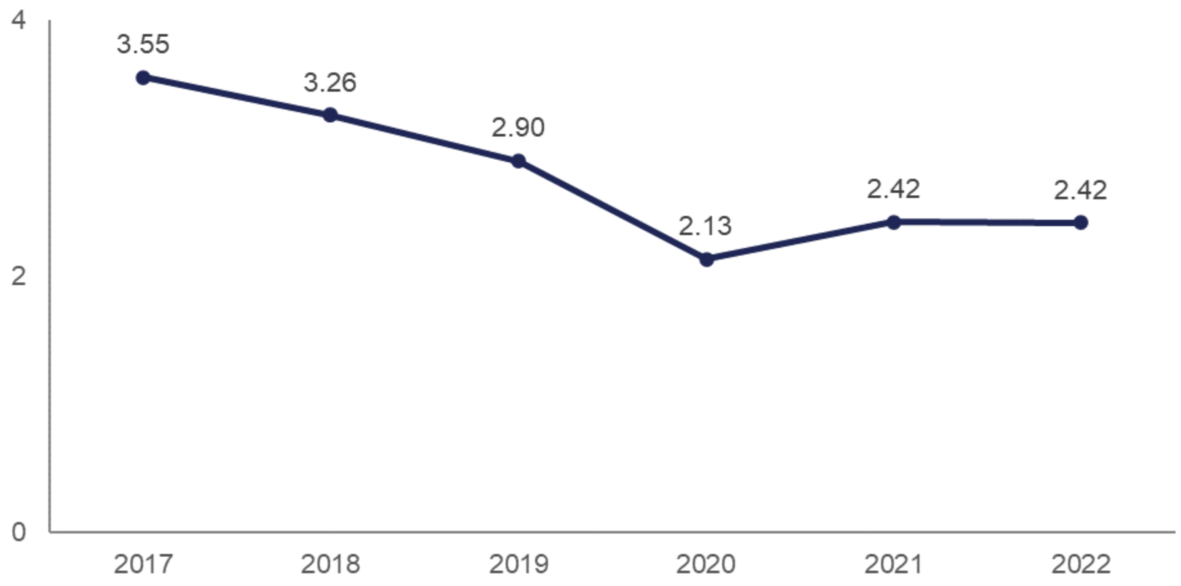
Door Drop volumes have stayed flat year-on-year, at 2.42 units received per household per week. However, they remain higher than mid-pandemic levels.

Maintaining average volumes demonstrates the resilience of the channel, especially when viewed in the context of a challenging economic and industrial environment, including:

- Rising energy, paper and print costs in 2022
- Strikes across Royal Mail, train operators, and the print and paper manufacturing industries

The knock-on effects of these wide-ranging issues include industry-specific pinch points; for example, hospitality Door Drop volumes decreased due to uncertainty about consumers being able to attend events. Meanwhile, some brands resorted to making their own provision to maintain Door Drop volumes. For instance, in September 2022, Lidl acquired a paper mill in Germany.

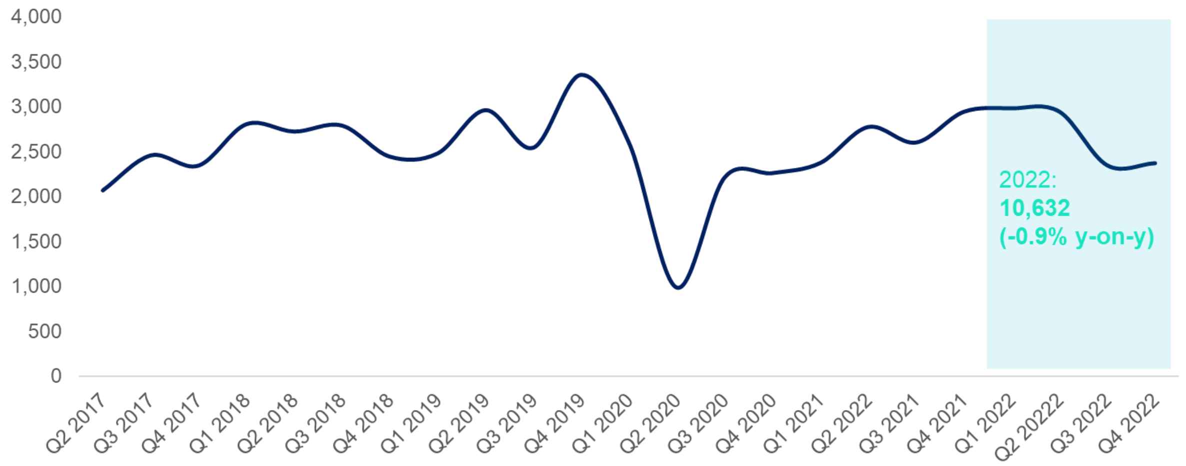
Door Drops received (units per household per week)



Through the industry-leading mail measurement system JICMAIL, and in lieu of Census-level data relating to mail circulation, it is possible to make data-driven observations about the state of Door Drop volumes within the mail channel. While JICMAIL was primarily set up to provide a quarterly measure of consumer mail engagement and mail effectiveness the robust, the nationally representative nature of the panel means that panel volume trends should mirror the overall picture of national circulation.

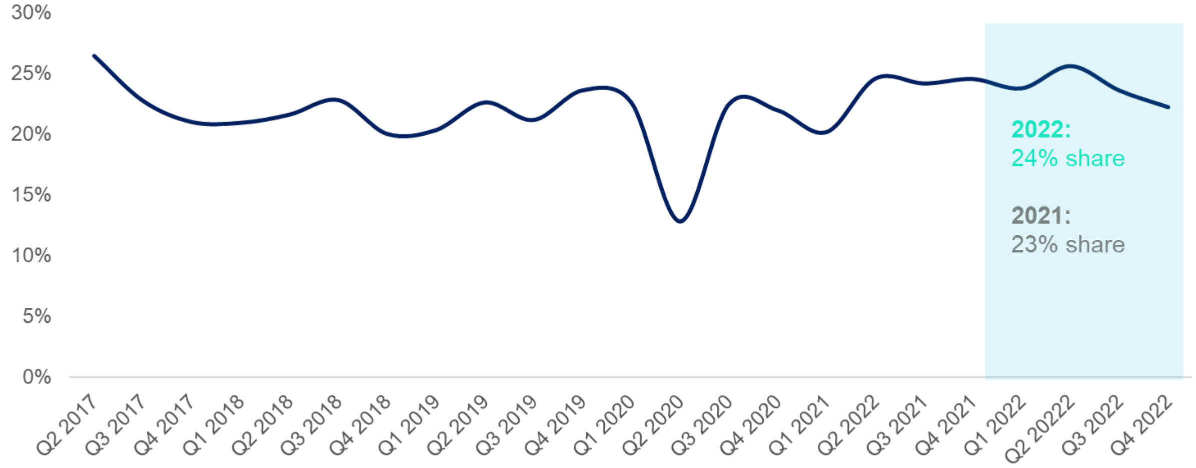
Door Drop volumes may have steadily climbed throughout 2021, but 2022 was very much a year of two halves. Volumes remained stable, almost at pre-pandemic levels, in Q1 and Q2. But they then experienced a slump in Q3, which industry experts attribute to factors ranging from the difficulty in sourcing paper alongside higher production costs, to industrial action by multiple unions and the economic uncertainty that followed the Chancellor's Growth Plan announcement in September 2022. As a consequence, by the end of the year Door Drop sample sizes on the JICMAIL panel had decreased by 0.9% year-on-year - although there was a slight recovery in Q4 volumes. In total, JICMAIL tracked 10,632 Door Drops on its panel in 2022.

JICMAIL Door Drop volumes (Q2 2017 to Q4 2022)



Despite the small annual decline Door Drops experienced during 2022, the medium's share of mail volumes actually rose slightly, by 1% to 24%, taking share from addressed mail. The high point for Door Drops as a share of mail volumes occurred in Q2, at the end of a strong first half.

JICMAIL Door Drop share of mail volumes (Q2 2017 to Q4 2022)



Engagement

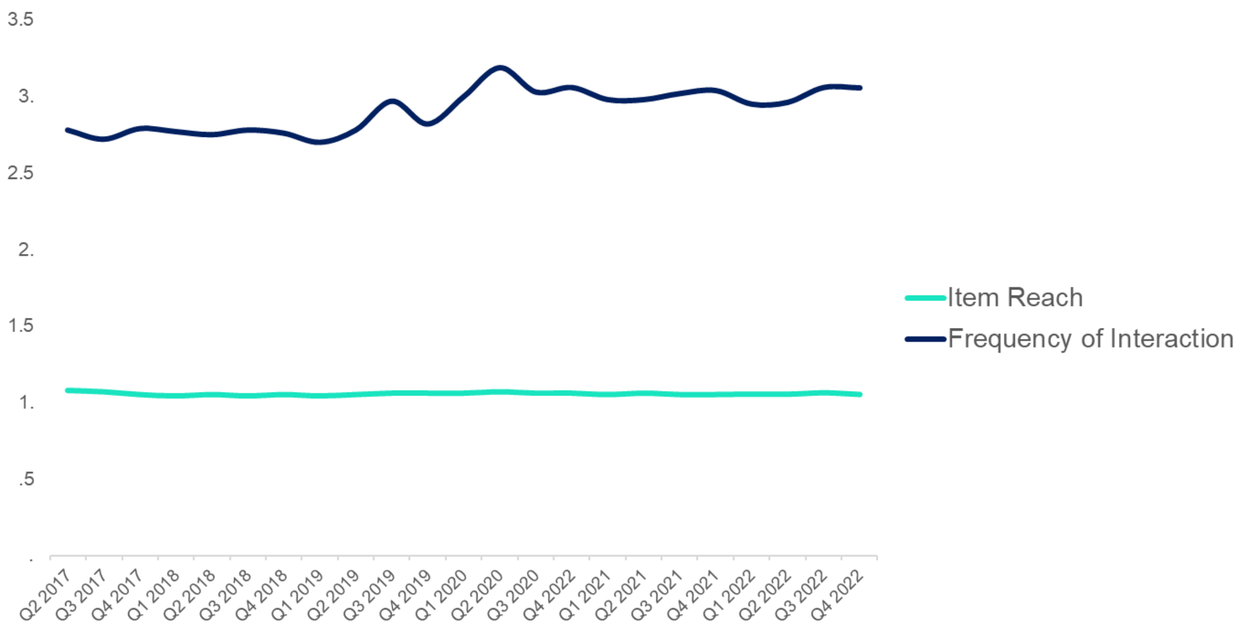
Tracking consumer engagement with Door Drops gives the industry a benchmark it can use to make credible and robust cases for their inclusion on media plans.

Each time a Door Drop is shared in the home, it contributes to a calculation that equates numbers of items delivered to numbers of eyeballs on ads.

And each time a Door Drop is interacted with (i.e. every occasion it's read, looked or glanced at; put aside to review later; or put in 'the usual place' among many other items) it contributes to a measure of frequency of exposure, which in turn is used to calculate Door Drop campaign impression delivery.

Usually credited to above-the-line channels, the delivery of ad impressions enables marketers to quantify total exposure to advertising messages. It is a vital measure in brand campaign planning. It allows the Door Drop channel to be evaluated with equal weighting to other channels on the media plan, while amplifying the role the mail channel has beyond delivering direct response KPIs.

Door Drop item reach and frequency Q2 2017 to Q4 2021

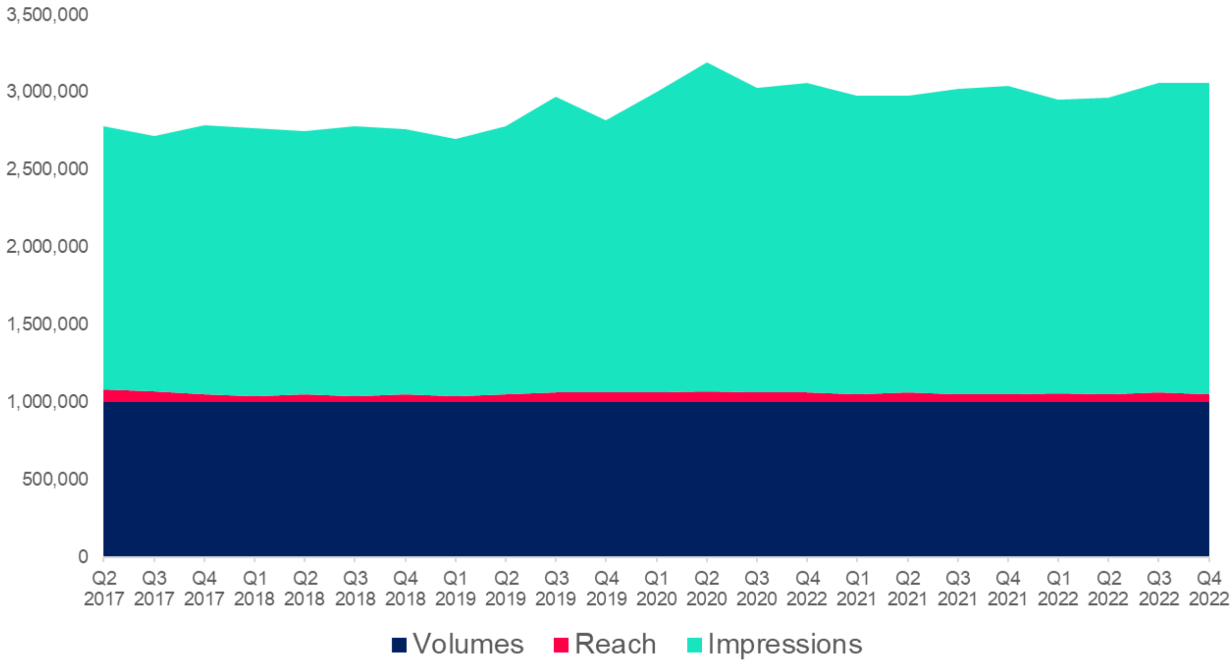


As of Q4 2022, the average Door Drop was shared with 1.05 people per household (a metric referred to as Item Reach), reflecting an additional 5% audience reach on top of campaign volumes. In addition, the average person in the UK interacts with each Door Drop 3.1 times a month. Together, these calculations allow us to quantify the numbers of eyeballs on ads (so in the example above, 1 million Door Drops will reach 1.05 million people), while quantifying the numbers of impressions generated by a campaign (in this case 1.05 million people interact with the average Door Drop 3.1 times each, resulting in 3.3 million impacts or impressions being generated).

As the chart below shows, layering ad impression delivery and audience reach on top of campaign volumes offers a different perspective on the quantity of ad exposure that advertisers are generating in-market by using Door Drops.

The key thing to note is that Door Drop as a channel in 2022 was not just resilient - it displayed improved levels of efficiency and effectiveness. We can conclude that the same level of spend on Door Drops is resulting in improved interaction and more impressions; a positive outcome in difficult times.

Door Drop reach and impression delivery



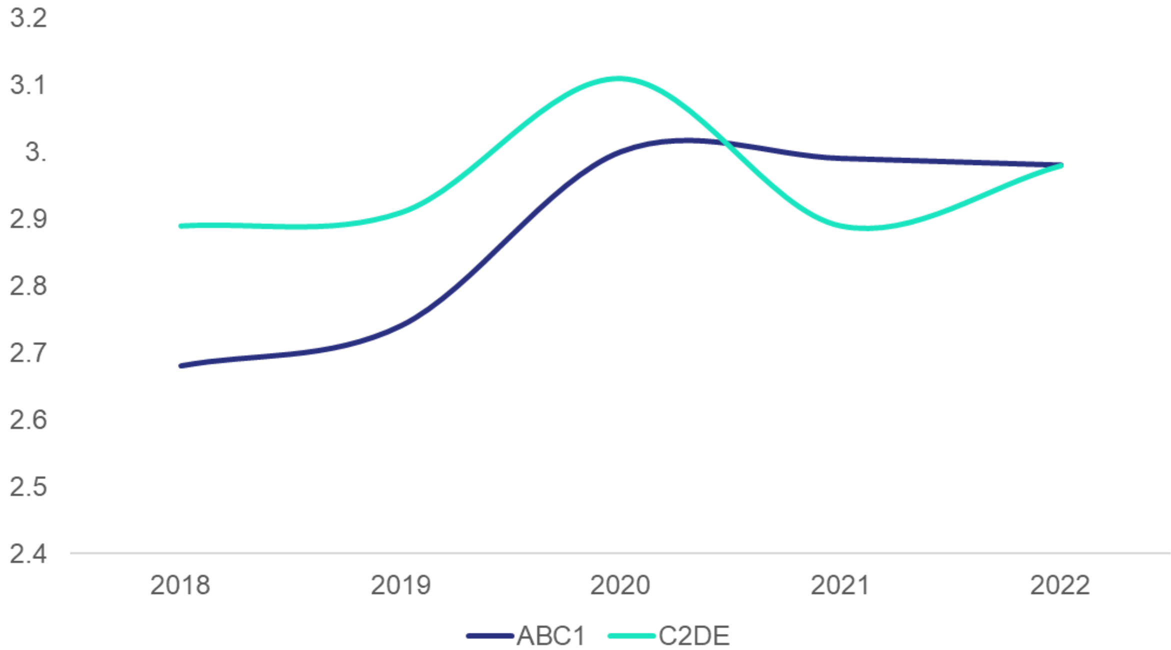
Frequency of Interaction by Audience

We can interrogate JICMAIL audience and household profile data to understand where this increased efficiency has come from. At the same time, the data provides an opportunity to consider future Door Drop-receptive audience targeting opportunities.

In terms of social grade, lower social grade audiences (generally audiences with lower-skilled jobs) have tended to be most receptive to Door Drops. Each year, the gap between ABC1 and C2DE Door Drop has narrowed, however, to the point where ABC1 Door Drop engagement overtook that of C2DEs in 2021. This trend was maintained throughout most of 2022. By the end of Q4, though, frequency for C2DEs and ABC1 household Door Drops had reached parity - an important consideration for media planning purposes. This reversal in the trend was likely because of the raft of offers being made through the Door Drop channel to lower-income households keen to find ways to combat the cost-of-living crisis.

Despite other studies, including IPA Bellwether data, highlighting a proliferation of offer-based marketing campaigns, it should be noted that ongoing strong metrics point to Door Drops' engagement and effectiveness but also present an opportunity to deliver brand-led messaging via this format; a chance to communicate brand value as well as highlight brand offers.

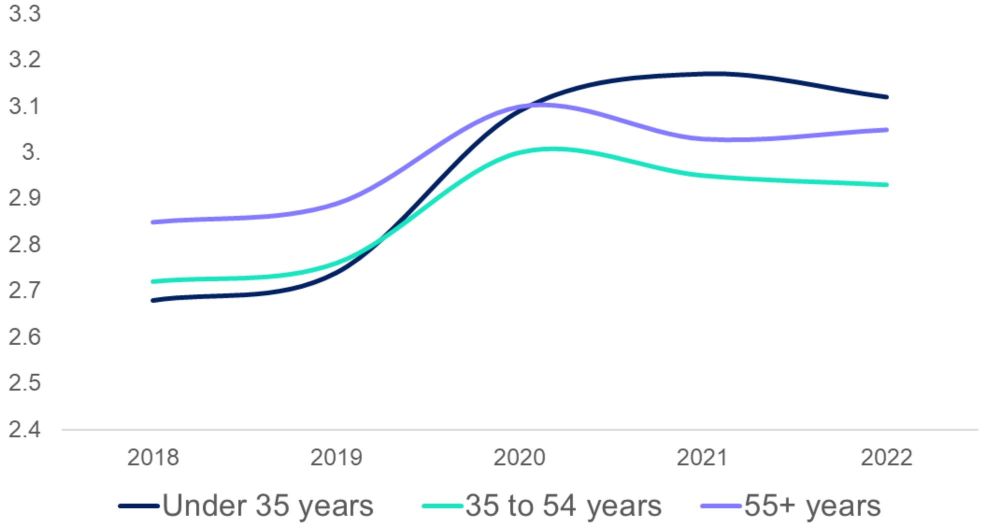
Door Drop frequency by household social grade



Younger audiences also present new targeting opportunities for advertisers in the mail channel. In 2018, the average under-35-year-old interacted with Door Drops less than 35- to 54-year-olds and those aged 55-plus. While all age groups have seen their Door Drop engagement increase since 2018, those under 35 have overtaken the other two age cohorts and - despite those aged 55-plus narrowing the gap during 2022 - they remain the most engaged age group overall. In a world of digital comms saturation where platforms are battling fiercely for consumer attention, the challenges of reaching young people with marketing messages are more acute than for the rest of the population.

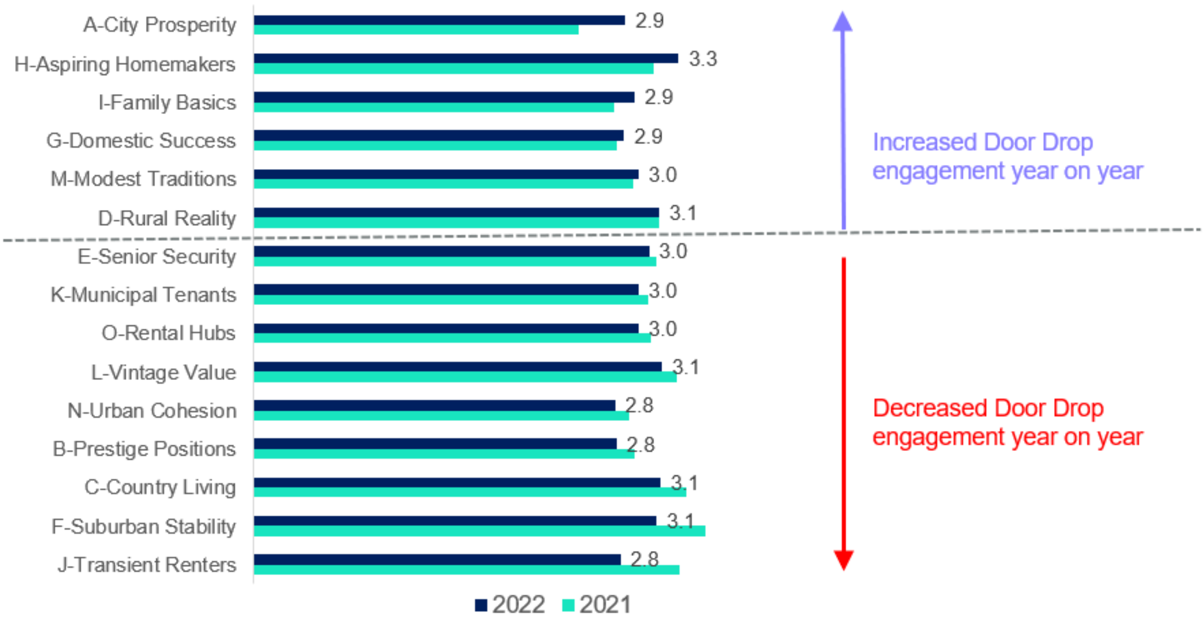
While young people under-index for mail exposure (i.e. they may be likely to engage with their mail but are under-targeted by advertisers), brands will likely achieve high cut-through and visibility on the doormats of younger households; particularly using Door Drops, as shown here - further contributing to the efficiency of this channel in targeting a traditionally hard-to-reach audience.

Door Drop frequency by household co-ordinator age



Geo-demographic segmentations are vital tools in the targeting of Door Drop campaigns and it is possible to visualise both ACORN and MOSAIC audience segmentations on JICMAIL's panel data. Approximately two fifths of the main MOSAIC segments recorded an uplift in Door Drop engagement / interaction rates in 2022 - fewer than the half which did so in 2021 - while the rest reported a decline. Aspirational audiences such as City Prosperity and Aspiring Homemakers mainly drove the increase in year-on-year engagement, although this was offset by declines among segments based on a range of income brackets. The most positive aspect of this analysis is the ability of the Door Drop medium to be effective across diverse socio-economic groups, which make the channel attractive to brands active in various industries.

Door Drop frequency by MOSAIC group



/ Methodology

DMA Data

This research seeks to estimate the size of the UK market in terms of volume and expenditure from advertisers who, directly or indirectly, fund the distribution of pre-printed communications material on a commercial basis. This includes leaflets, catalogues, newsletters and product samples for commercial organisations, local authorities, charities and central government, as well as locally sourced directories.

The survey specifically excludes volumes and distribution expenditure for:

- Local free weekly newspapers (the actual host newspaper)
- Items inserted mechanically into paid or free publications
- National directories, where these are effectively publications with advertising space sold by the media owner (e.g., Phonebooks, Local Directories)

The above categories measure their own advertising revenue separately and have control over their own recycling and waste control arrangements, liaising directly with Defra.

Volume and expenditure data were kindly provided by anonymous contributors. The analysis was carried out in-house by the DMA's Insight department. The sample covers major door drop companies operating in the UK. This information was collected between February and April 2023 and the data corresponds to January to December 2022. All the information collected is confidential and only aggregates are published in this report.

There were several providers – including one significant provider – that had contributed data for this report from 2009 to 2014 that did not take part in this year's edition. To estimate an industry total for 2020 previous contributions were used to calculate an up-weighting factor.

This report was compiled by the DMA's Insight, with comments and input from members of the DMA Print Council's Door Drop Hub.

JICMAIL Data

JICMAIL is the independent media planning currency representing the mail industry. JICMAIL is based an ongoing study by Kantar TNS which overcomes a number of inherent challenges in the recording of mail exposure. Mail is a directly addressable medium. Unlike TV or print, there is no other reason to interact with mail other than to interact with mail. Simply asking people how often they are exposed to mail fails to capture the full picture.

These challenges present methodological opportunities for JICMAIL. A rotating panel of over 1000 households a month completes a diary-based app in which they capture an image of every mail item they receive in a week, record what type of mail it is and who sent it, and then record exactly what they did with the item both immediately and over a 28 day period. A household co-ordinator (who's responsibility it is to collect, sort and distribute the post) records all mail activity for all household members.

The list of physical interactions that can be recorded for mail items includes opening, reading, filing away and throwing away amongst many others. This rich picture of how mail is interacted with contributes to a calculation of frequency of exposure – a figure which, along with reach, can be analysed for multiple mail types and audiences. In addition, twelve commercial actions (i.e., effectiveness metrics) are also captured for mail.

JICMAIL accreditation and access is open to the entire mail ecosystem. Find out more here: https://www.jicmail.org.uk/training/accreditation/

/ About the DMA

The Data & Marketing Association (DMA) comprises the DMA, Institute of Data & Marketing (IDM) and DMA Talent.

We seek to guide and inspire industry leaders; to advance careers; and to nurture the next generation of aspiring marketers.

We champion the way things should done, through a rich fusion of technology, diverse talent, creativity, insight – underpinned by our customer-focused principles.

We set the standards marketers must meet in order to thrive, representing over 1,000 members drawn from the UK’s data and marketing landscape.

By working responsibly, sustainably and creatively, together we will drive the data and marketing industry forward to meet the needs of people today and tomorrow.

www.dma.org.uk

/ About JICMAIL

JICMAIL provides essential data for the whole of the mail industry to help plan, pitch and evaluate the effects of using the mail channel.

Like all joint industry currencies, JICMAIL has board representatives from both the buy side and sell side of the channel, including: Royal Mail Market Reach, Whistl. ISBA, The IPA and The DMA.

Under the new JICMAIL levy, access to the data carries no cost. To access the data you need to sign a Standard Licence Agreement, available from the team at JICMAIL. Once signed and returned, you will be provided access along with training and support.

JICMAIL data use is through JICMAIL Discovery or using channel planning software. If you wish to conduct your own analysis on the quarterly release data, you can receive the data in whatever data format you prefer (e.g. SPSS/Excel/CSV etc).

All JICMAIL subscribers are required to be accredited by JICMAIL. This means signing the Data Agreement and agreeing a simple Adoption Plan.

www.jicmail.org.uk

Copyright and Disclaimer