

A background image of two young women sitting together, looking at a laptop screen. The image is overlaid with a semi-transparent red filter. The woman on the left is pointing at the screen, and the woman on the right is smiling and looking at the screen. The text is overlaid on the left side of the image.

JICMAIL Quarterly Results Webinar Q2 2025

*Mail the Super Touchpoint and
the Long Short of Loyalty*



Mail Media Metrics

Hiscox spills the wine

I share [#advertising](#) and [#marketing](#) insights daily, follow for more.



DM growth outstrips most ATL channels

Media	Q1 2025 year-on- year % change	2025 forecast year-on- year % change	Percentage point (pp) change in 2025 forecast vs April	2026 forecast year-on- year % change	Percentage point (pp) change in 2026 forecast vs April
Search	12.3%	9.4%	1.2pp	7.0%	0.2pp
Online display*	10.1%	9.2%	0.0pp	6.8%	-0.1pp
TV	-2.1%	-0.9%	-1.8pp	4.0%	0.0pp
of which VOD	5.4%	10.1%	-7.0pp	14.1%	0.6pp
Out of home	1.0%	3.1%	0.4pp	4.1%	-0.2pp
of which digital	1.6%	3.7%	0.5pp	5.5%	-0.3pp
Online classified*	-7.6%	-4.7%	-2.5pp	-2.5%	-1.6pp
Direct mail	3.6%	-1.6%	2.1pp	-2.0%	0.2pp
National newsbrands	-8.2%	-5.0%	-1.7pp	-0.7%	0.6pp
of which online	-4.5%	-1.7%	-2.5pp	0.9%	0.2pp
Radio	0.4%	1.2%	-0.6pp	2.1%	-0.2pp
of which online	16.4%	12.2%	7.2pp	5.5%	1.7pp
Magazine brands	-11.1%	-6.8%	-1.5pp	-1.9%	0.5pp
of which online	-13.9%	-6.4%	-1.9pp	-1.2%	0.2pp
Regional newsbrands	-6.8%	-4.4%	-1.0pp	-0.5%	0.6pp
of which online	2.6%	0.8%	-0.1pp	1.6%	0.2pp
Cinema	19.2%	9.0%	1.9pp	2.2%	-1.8pp
TOTAL UK ADSPEND	8.0%	6.8%	0.4pp	5.6%	0.0pp
Note: Video-on-demand (VOD), digital revenues for newsbrands, magazine brands, and radio are also included within online display and classified totals. Online classified also includes revenues for national and regional newsbrands, as well as B2B magazine brands. Care should be taken to avoid double counting these series. Online radio includes targeted in-stream radio/audio advertising sold by UK commercial radio companies, together with online S&P inventory. TV VOD includes broadcaster (BVOD), advertiser-funded (AVOD) and subscription (SVOD) services which include advertising. Source: AAWARC Expenditure Report, July 2025					



DM and Door Drop Volumes up 4%

In H1 2025:



Direct Mail
items tracked

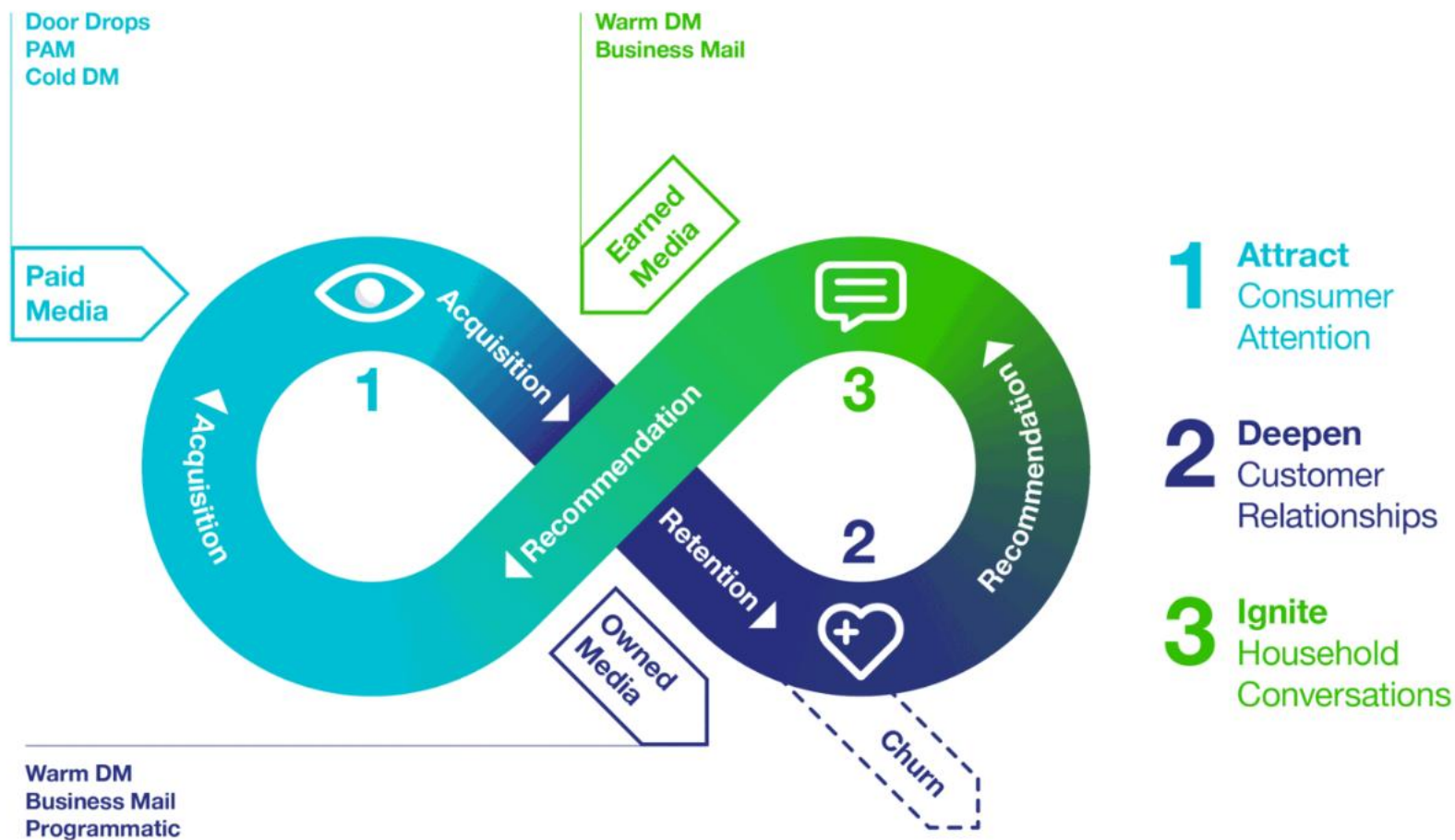


Door Drop
items tracked



Volume growth for DM
and Door Drops year-
on-year

Why Mail is a Super Touchpoint

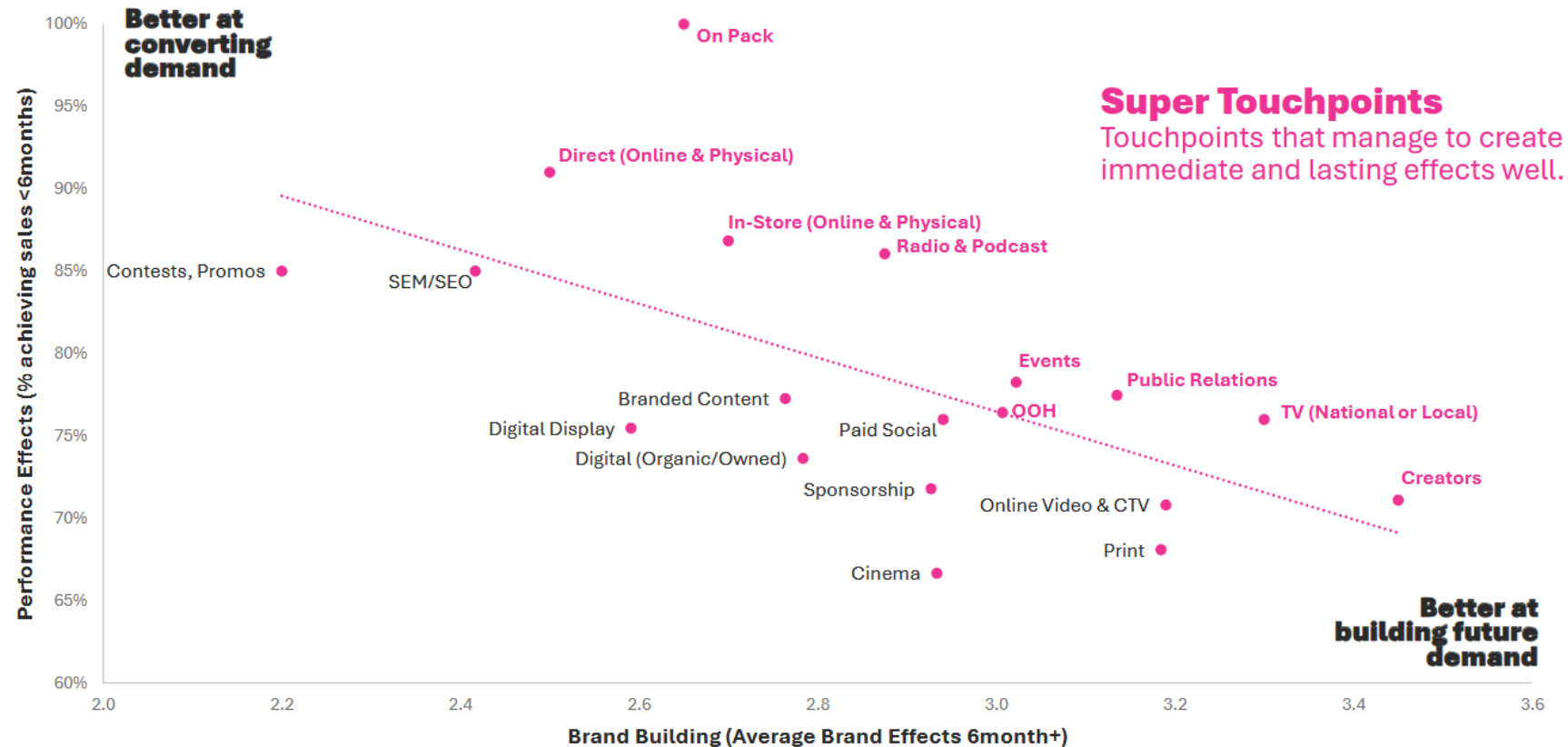


The language of Super Touchpoints is catching on

6

Touchpoint choices impact outcomes

THE
CREATIVE
DIVIDEND



Mail's Super Touchpoint Strengths in Q2 2025

 **4.56**

Frequency of DM mail interaction: a five year high.

 **+15%**

Growth in mail purchase effectiveness

 **8%**

of mail that prompts an account look-up also triggers an app download

 **145 secs.**

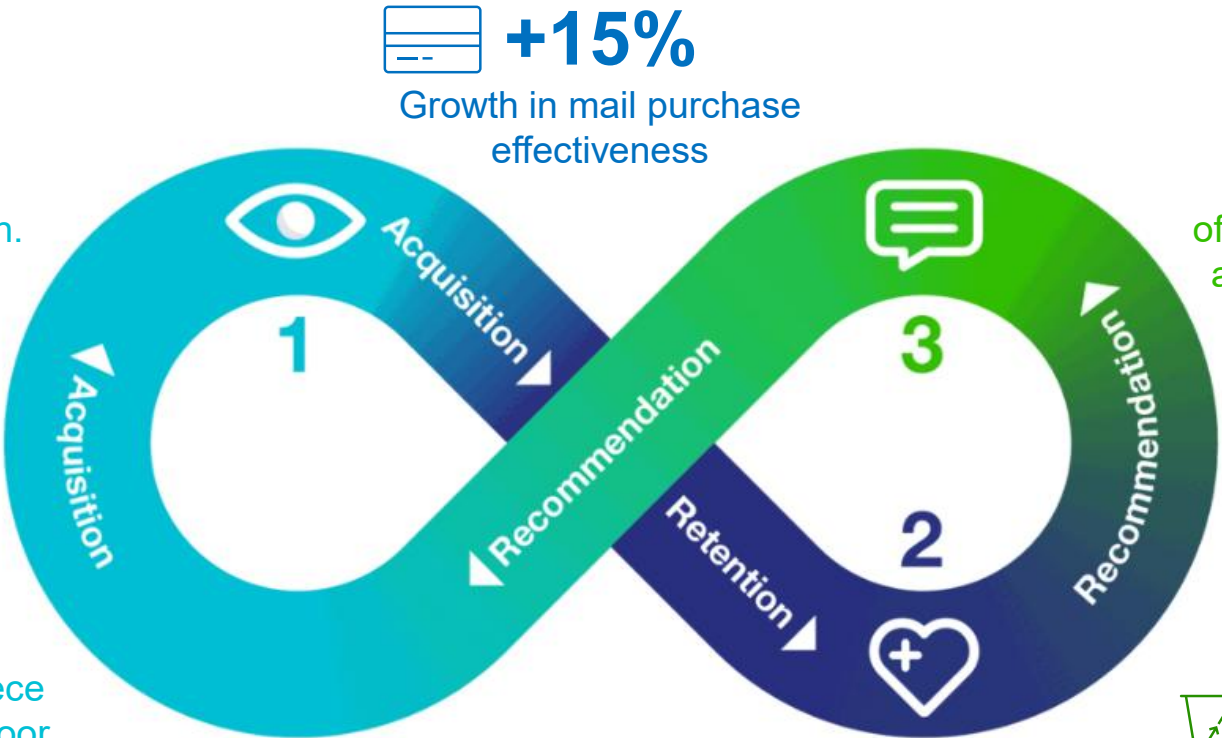
Spent with the average piece of DM. **60 seconds** with Door Drops.

 **9.2%**

of mail prompts a website visit: a five-year high reading of this metric.

 **87%**

Of discarded mail is recycled.



Mail Engagement Q2 2025

Reach, Frequency, Lifespan and Attention

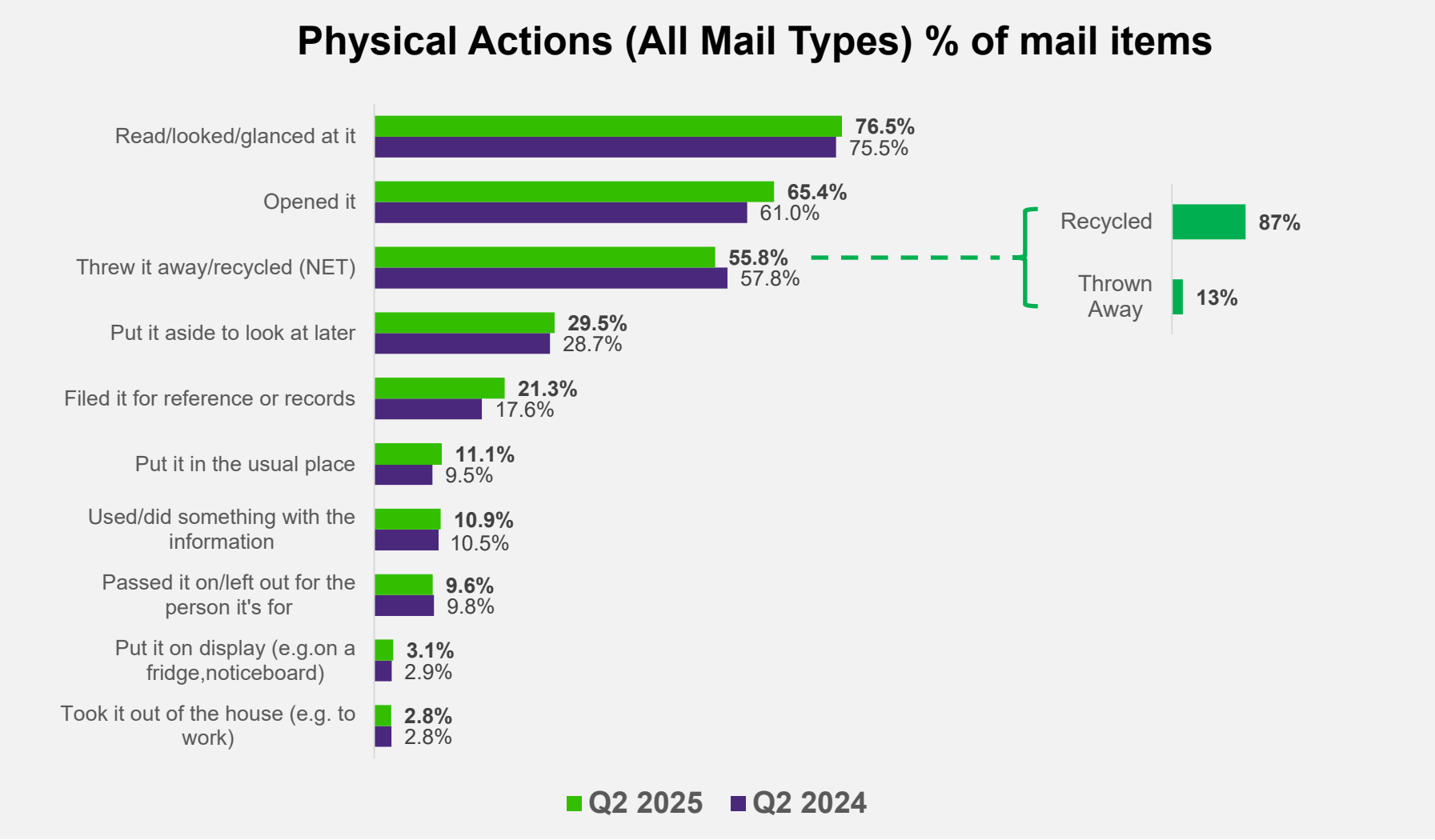
Mail read, open and retention rates all up year on year in Q2 2025 9

Nearly all key physical actions with mail grew in Q2 2025, with read rates continuing on an upward trajectory and open rates steadily climbing for the last figure quarters.

The amount of mail put aside to look at later and filed away, points to the desire among consumers to retain key advertiser comms delivered via the mail channel.

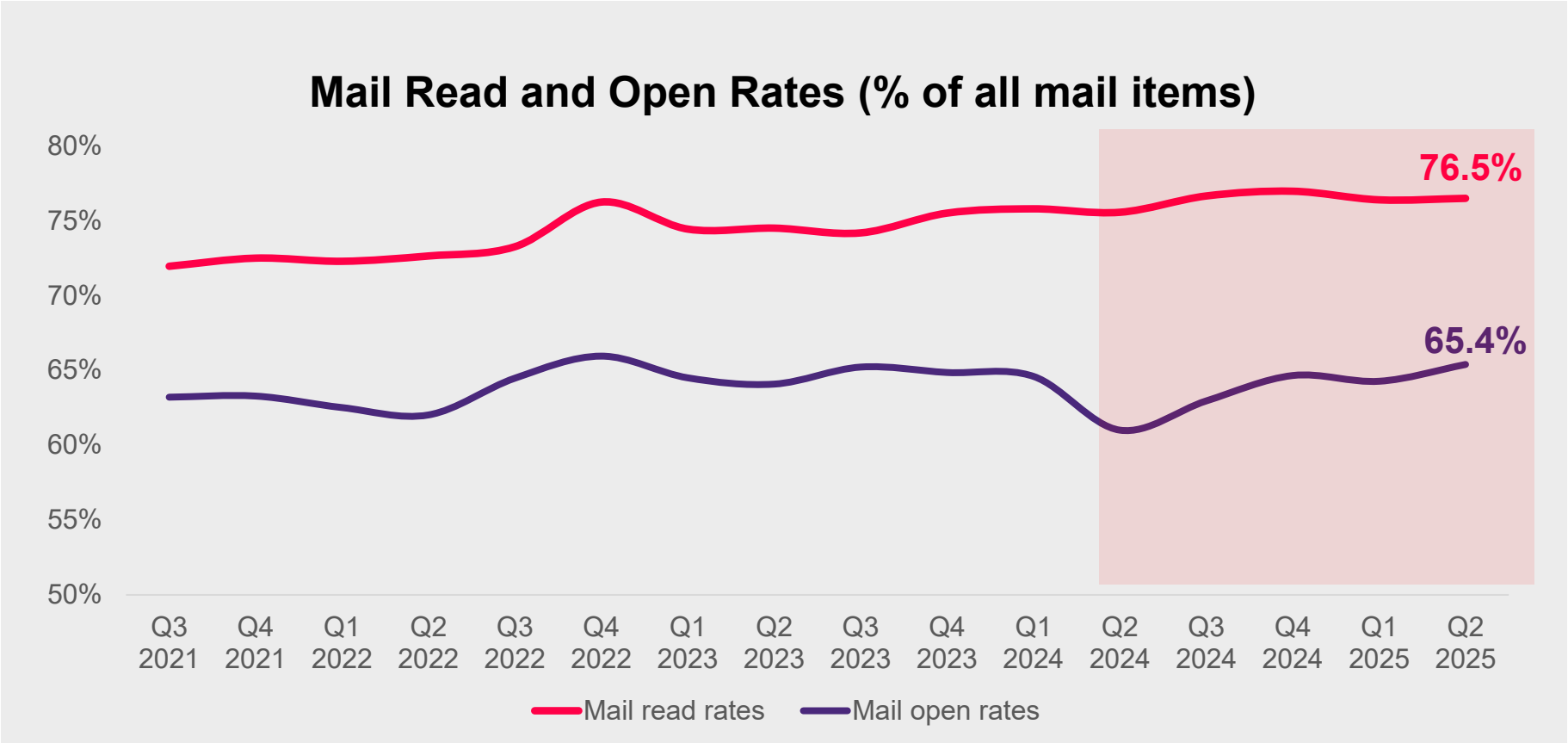


Mail Media Metrics



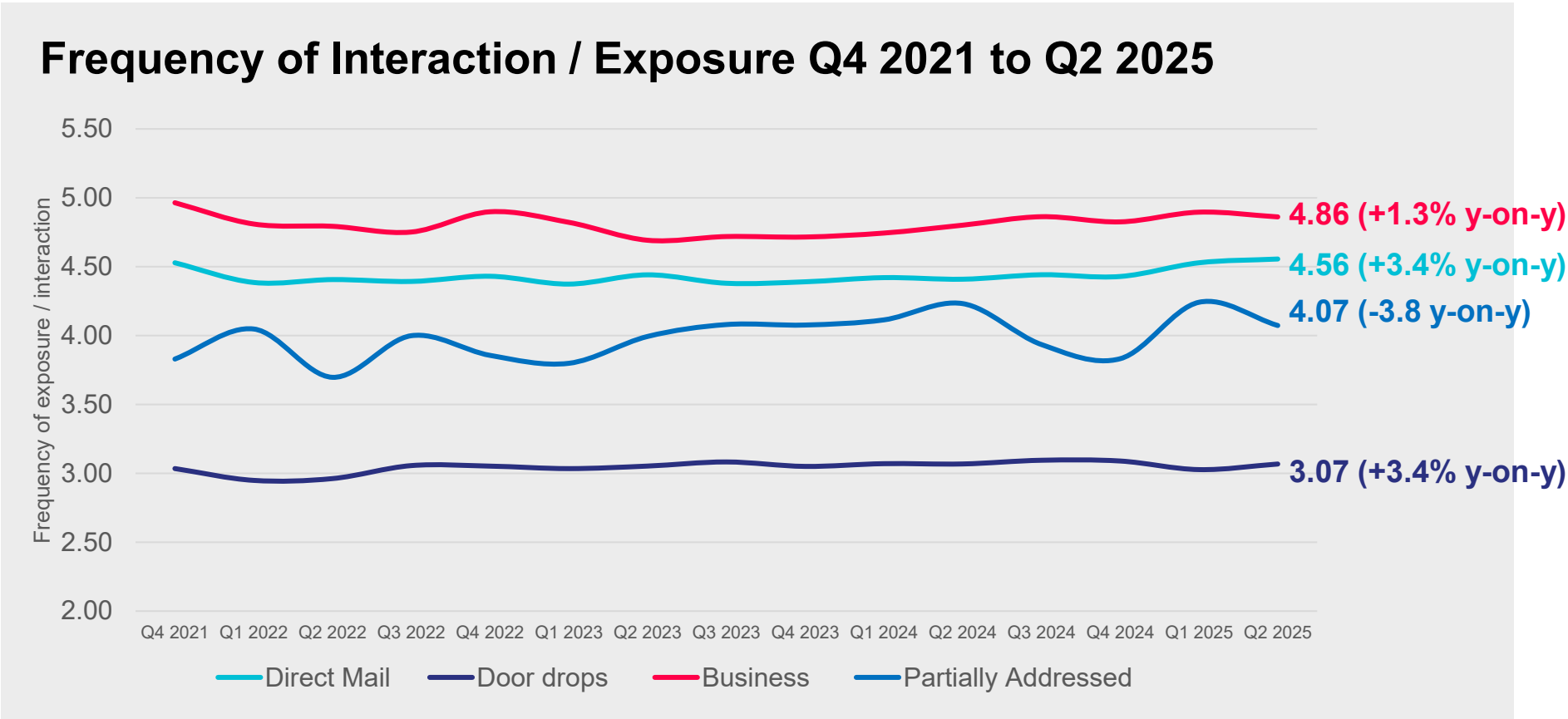
Source: JICMAIL Item Data Q2 2024 n=11,548 mail items; Q2 2025 n=9,802 mail items

Mail read rates continue on a long-term upward trend, while open rates have been steadily increasing across the last year



Mail frequency of interaction across 28 days up across all core mail types

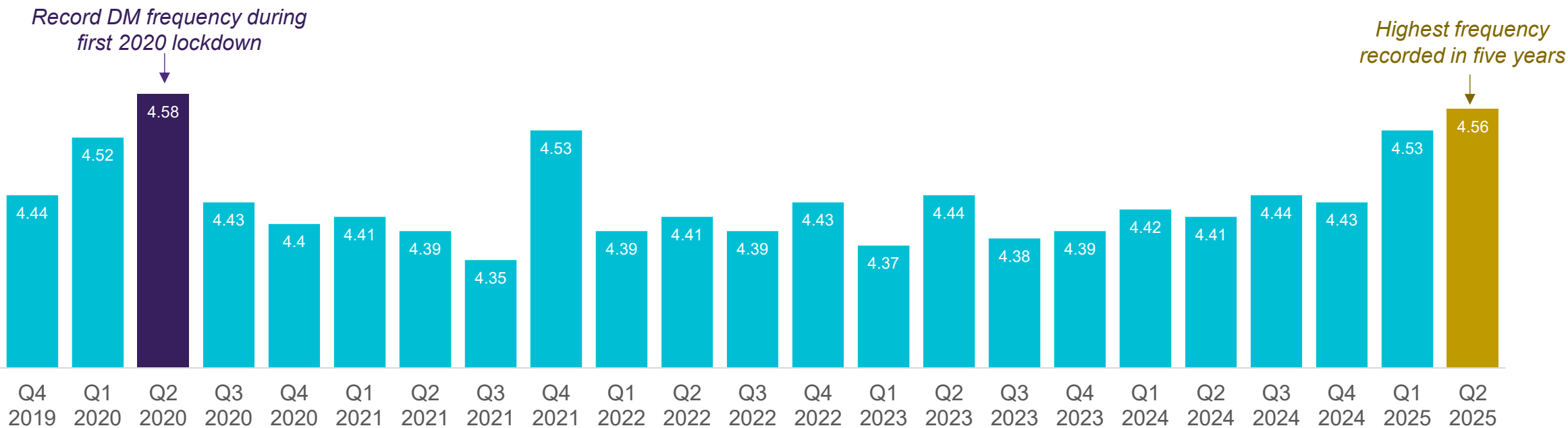
Those who invested in the Direct Mail channel in Q2 2025 saw the rate at which mail items converted into ad impressions increase by 2.6% year. This is the highest interaction rate recorded since the last record set in the covid era in Q2 2020.



Source: JICMAIL Item Data Q4 2021 to Q2 2025 n=159,218 mail items

Direct Mail frequency of interaction hits five year high

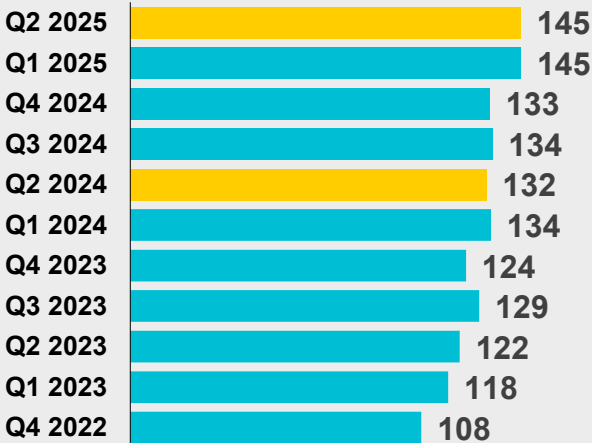
Direct Mail Frequency of Interaction Q4 2019 to Q2 2025



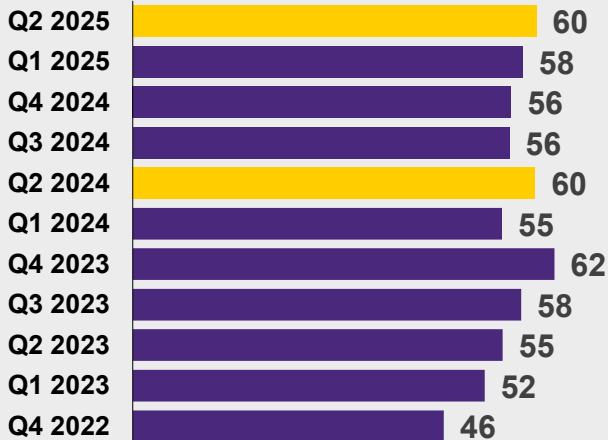
Direct Mail attention increased by 13 seconds per item year on year in Q2 2025

The average Direct Mail item was interacted with for 145 seconds by anyone in the household across a 28 day period in Q2 2025, and the average Door Drop for one minute.

Direct Mail Attention (seconds interacted with per item)



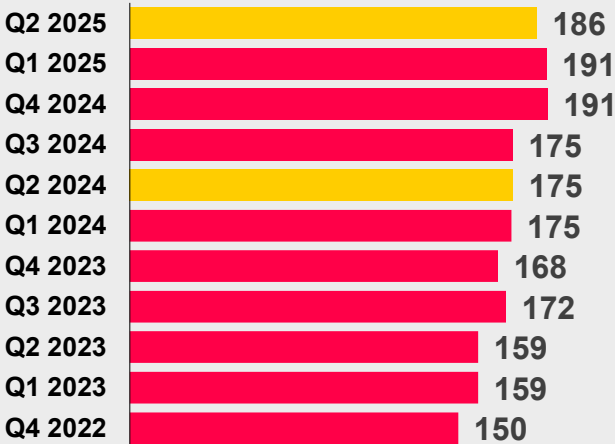
Door Drop Attention (seconds interacted with per item)



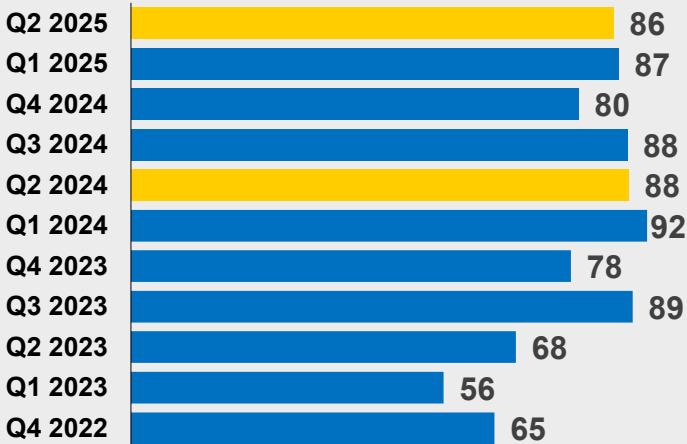
Business Mail attention increased by 11 seconds per item year on year in Q2 2025

The average Business Mail item was interacted with for 186 seconds by anyone in the household across a 28 day period in Q2 2025.

Business Mail Attention (seconds interacted with per item)



Partially Addressed Mail Attention (seconds interacted with per item)



Mail Effectiveness Q2 2025

Mail's Super Touchpoint Strengths

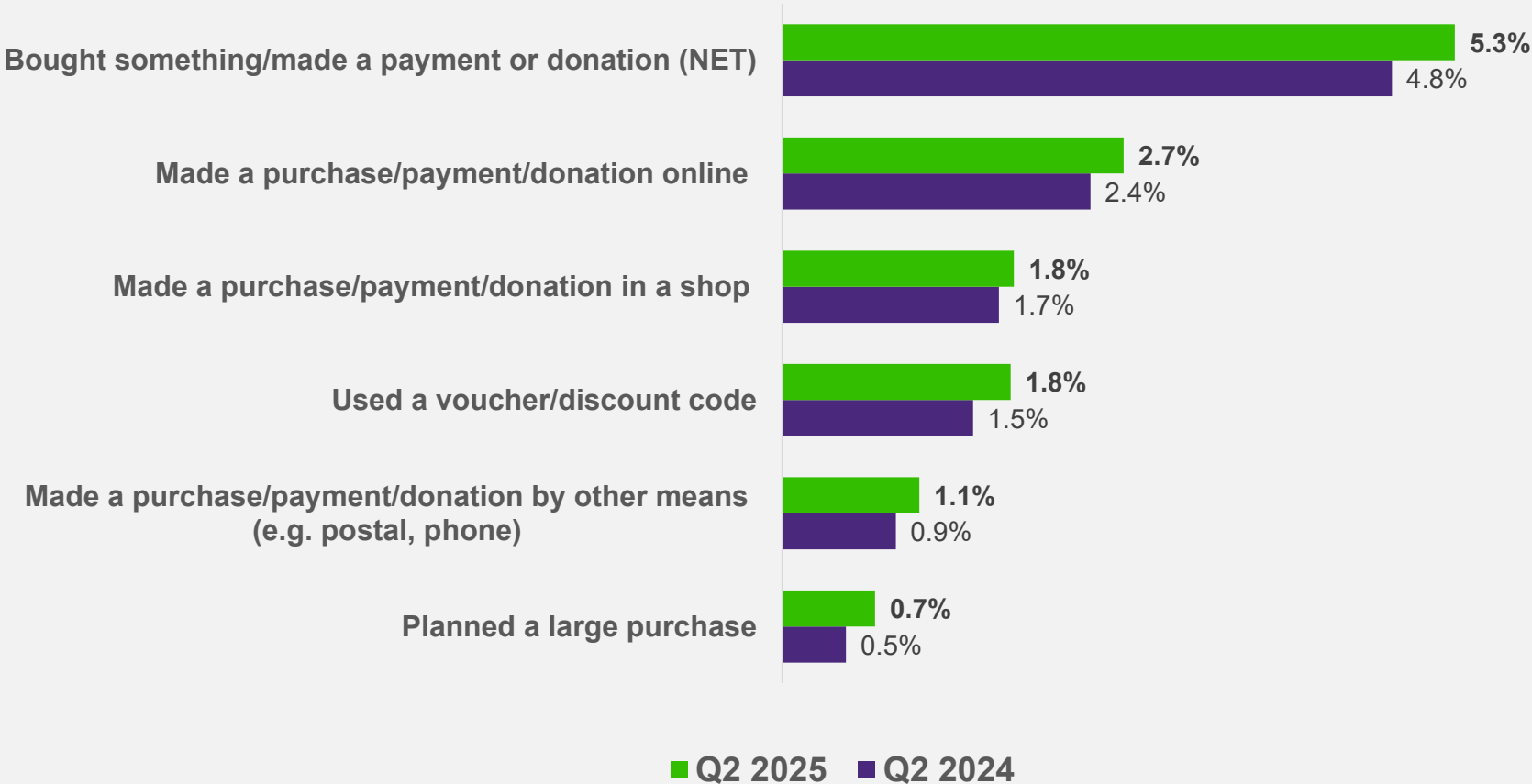


Mail Media Metrics

From voucher redemption, to planning large purchases, mail's impact on driving sales increased across the board in Q2 2025

Customer Acquisition

Commercial Actions (All Mail Types) % of mail items



Source: JICMAIL Item Data Q2 2024 n=11,548 mail items; Q2 2025 n=9,802 mail items

The majority of purchases prompted by mail are transacted online

However, the 34% of purchases that are transacted in store continues to demonstrate that mail still has a significant footfall effect for bricks-and-mortar retailers.

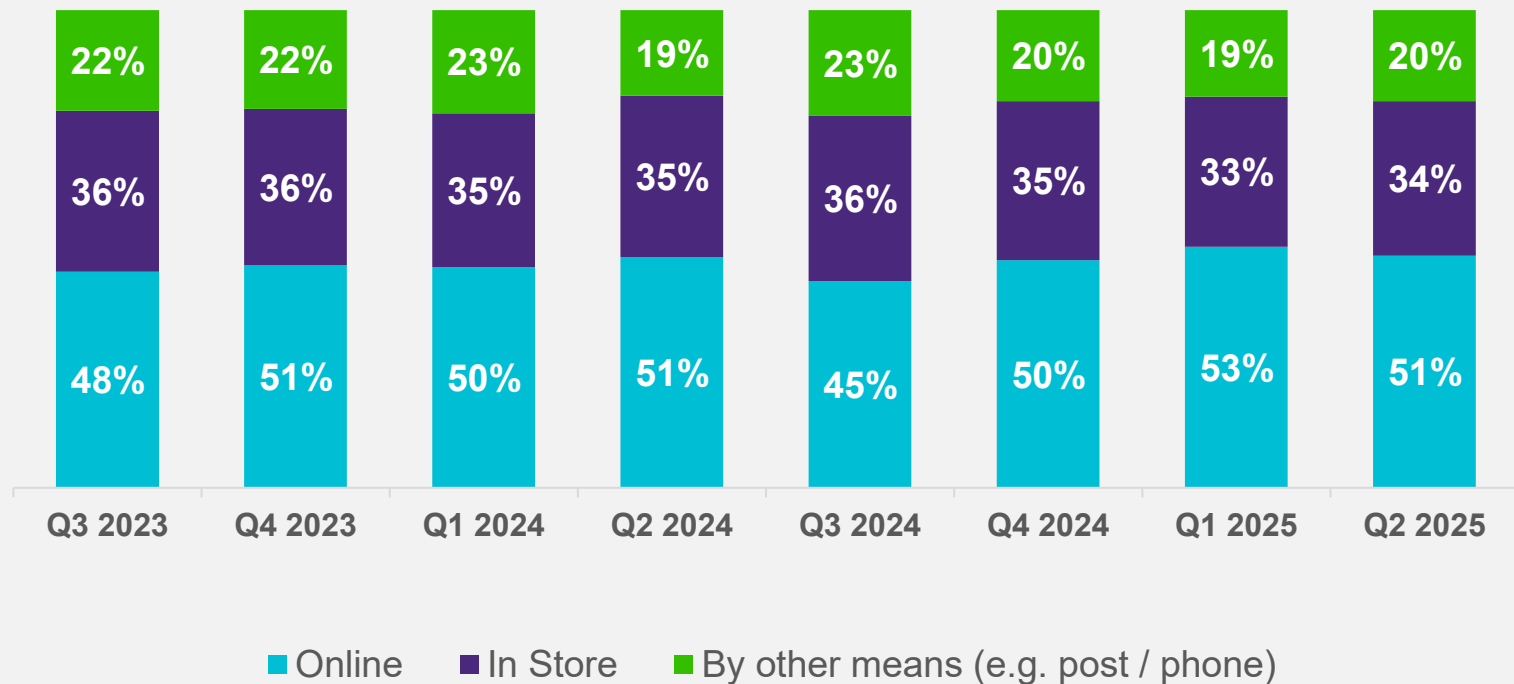
In addition, with one fifth of purchases transacted by post or phone, mail continues to prove its impact in driving omni-channel shopping experiences.



Mail Media Metrics

Purchases by Channel

(base: % of DM, Door Drop and Business Mail items prompting a purchase)



Source: JICMAIL Item Data Q3 2023 to Q2 2025 n=83,265 mail items

Significant growth in website visits and account detail look-ups prompted by mail in Q2 2025

Customer Retention and Recommendation

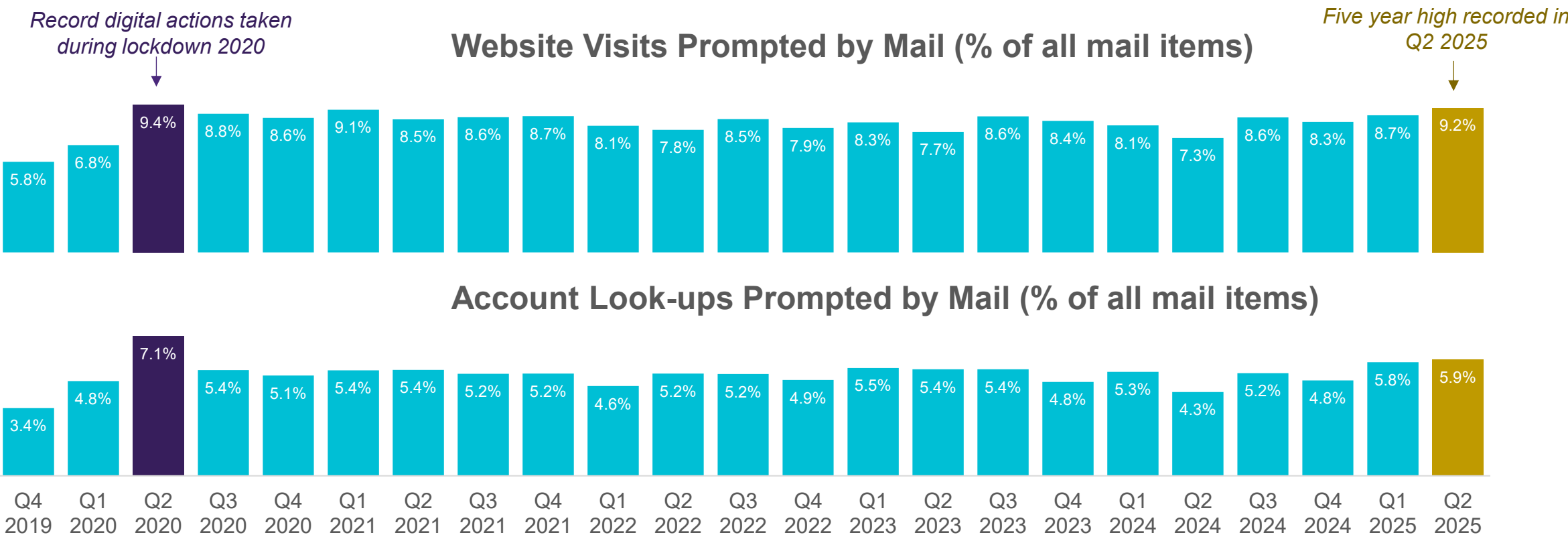
Commercial Actions (All Mail Types) % of mail items



Mail Media Metrics

Source: JICMAIL Item Data Q2 2024 n=11,548 mail items; Q2 2025 n=9,802 mail items

Key digital actions driven by mail at a five-year high

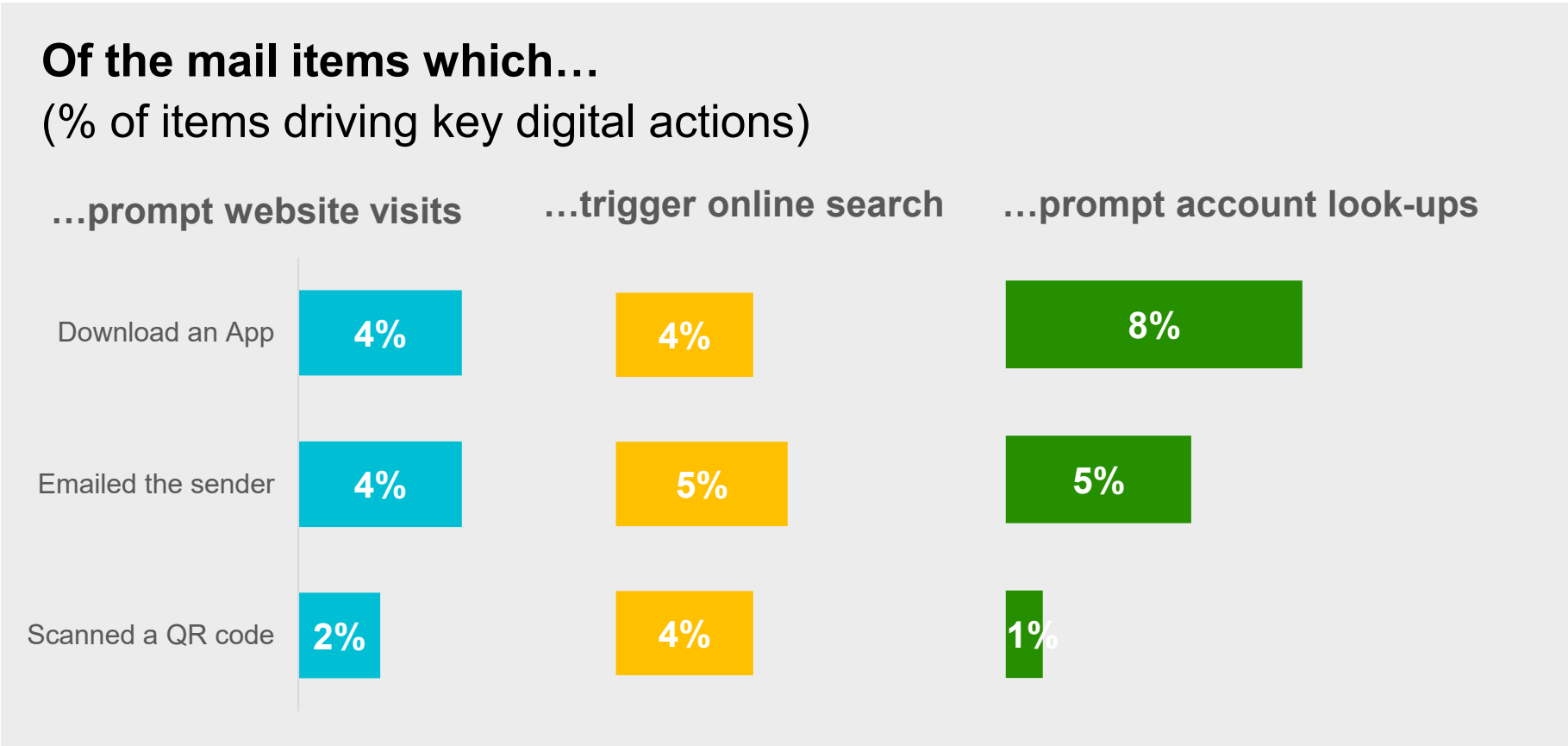


Website visits and account look-ups are linked to other key digital customer engagement actions

8% of the mail which triggers an account look up also triggers the download of an app.

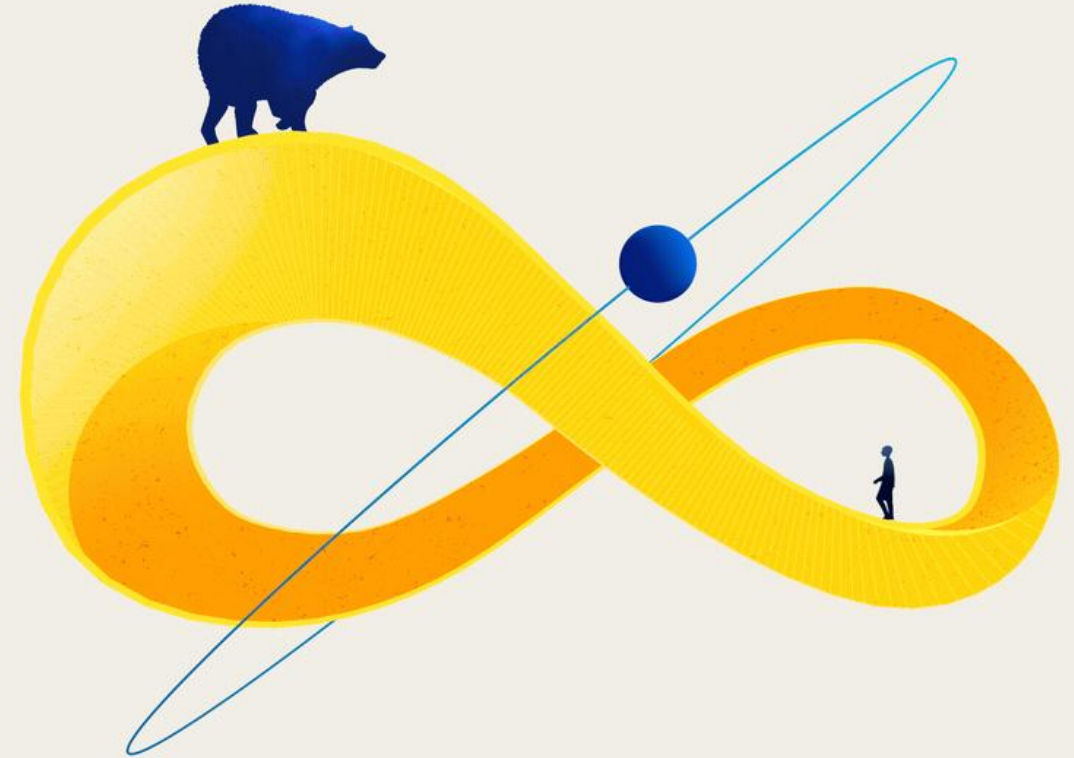
4% of mail that prompts a website visit also prompts an email to the sender.

Online searches are particularly effective at driving emails to the sender and QR code scans.



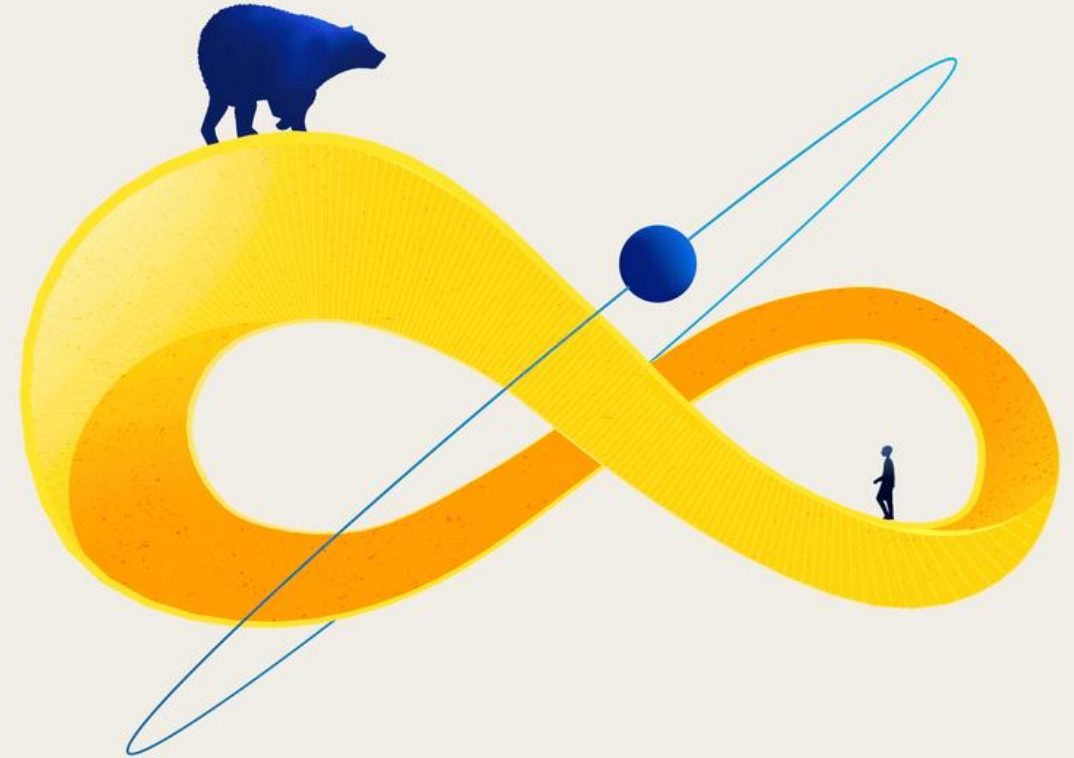
Source: JICMAIL Item Data Q3 2023 to Q2 2025 n=10,011 Direct Mail, Door Drop and Business Mail items which drive website visits, searches or account look-ups

THE LONG AND SHORT OF LOYALTY



Ellie Gauci

Head of Strategy,
Loyalty and CRM, VCCP



Transactional Loyalty

Short term effects



The Power of Loyalty



Emotional Loyalty

Long term effects

It only works if it all works



Can we put a value on it?



OBJECTIVE

How does loyalty contribute to overall marketing effectiveness?

The source for this analysis is the DMA Effectiveness Databank – a database built on 1,720 DMA award entering campaigns running from 2017 to 2024.

A cohort of 100 awards entries which specifically cite the usage of loyalty data in their campaigns have been used as a proxy for loyalty.

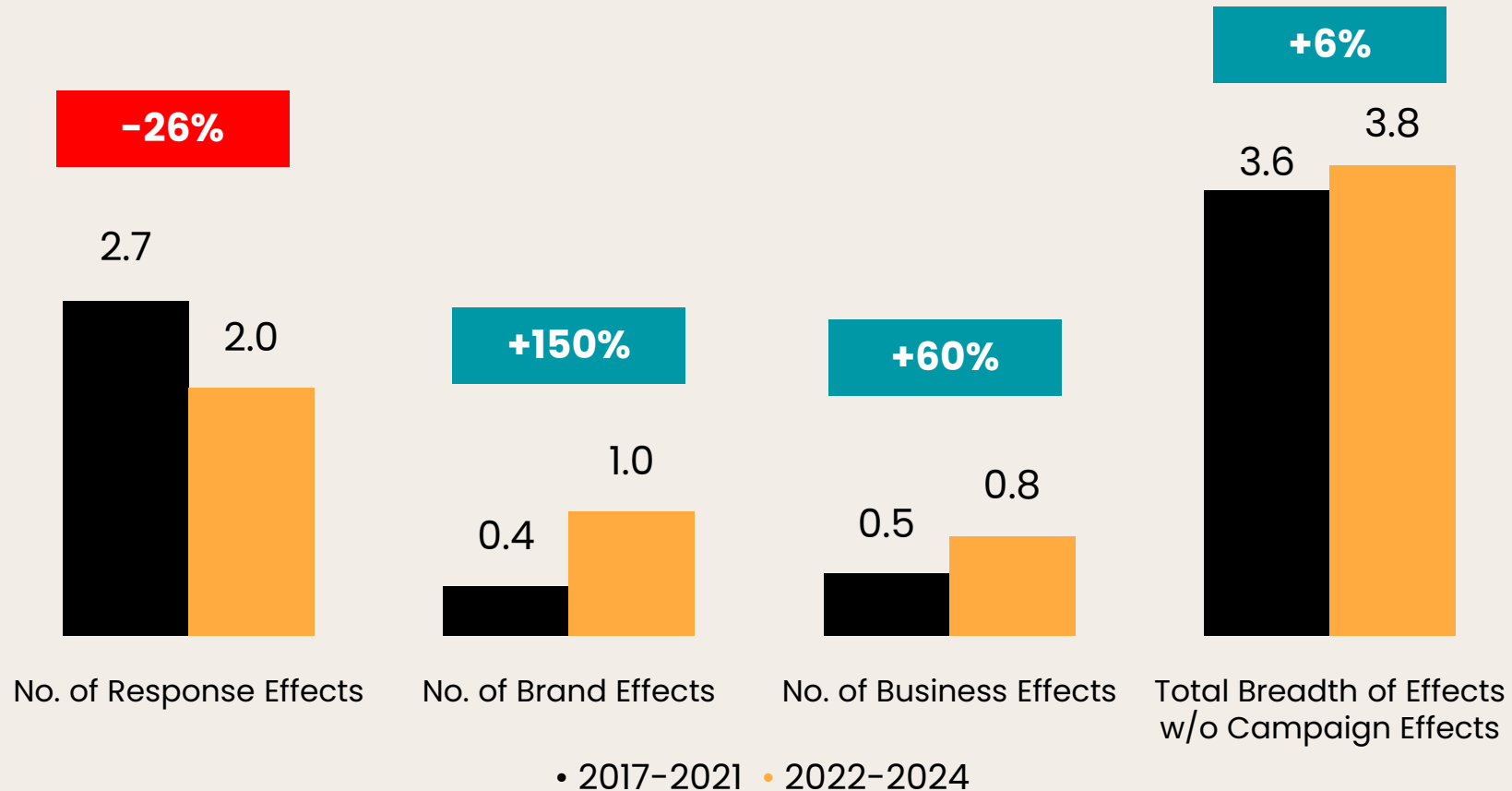


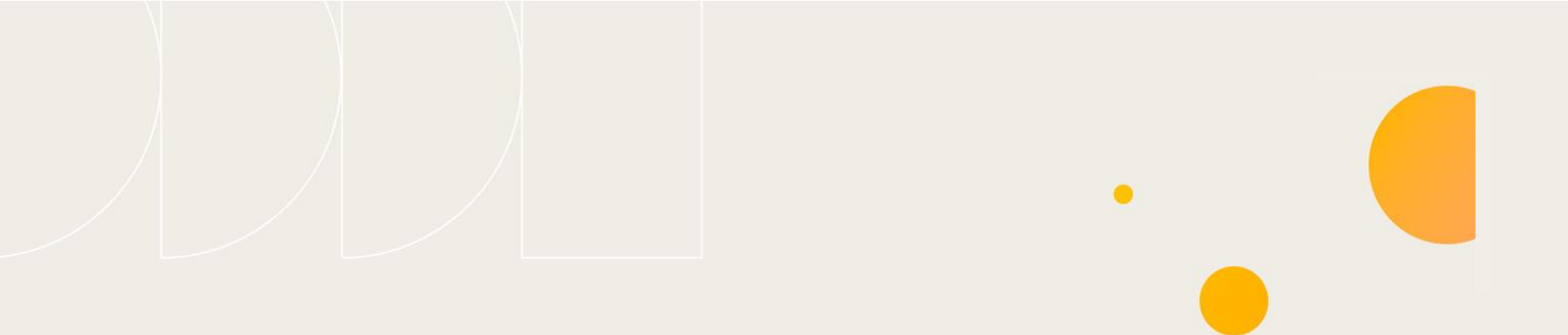
What effect do you want from loyalty?



The loyalty pivot from short to long is real

**Effectiveness of loyalty centric campaigns over time
(Number of effects per campaign)**

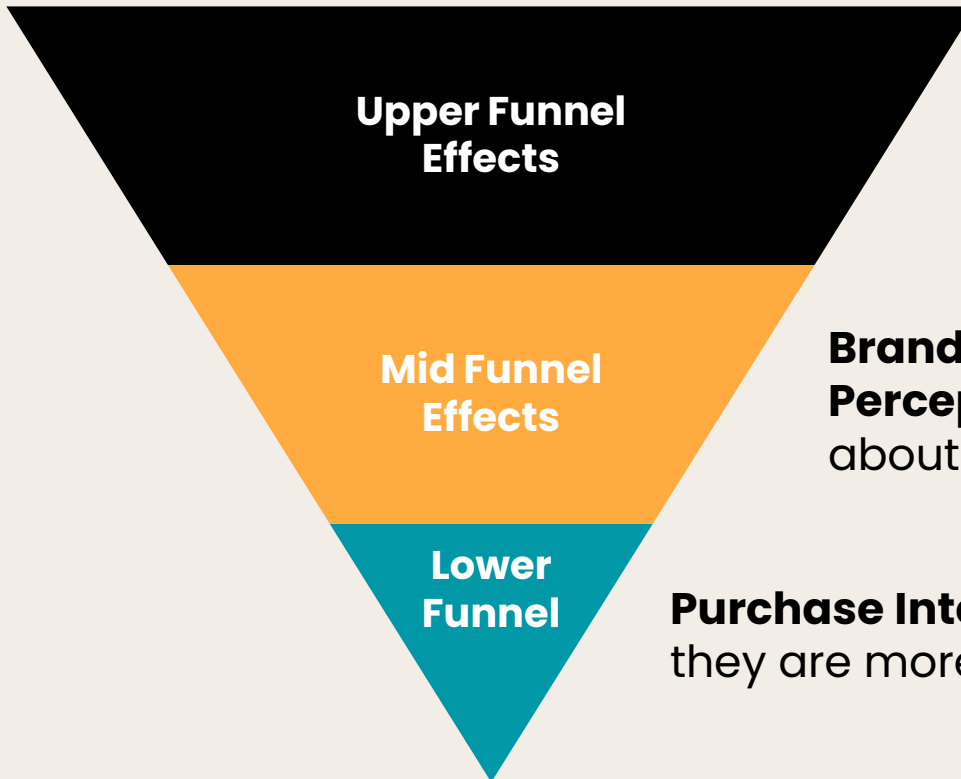




SO WHAT DOES LOYALTY DATA BRING TO **THE BRAND-BUILDING PARTY?**



In a simplified world, brand building works though...



Upper Funnel Effects

Brand Awareness, Mental Availability: Getting more potential buyers in the top of the funnel

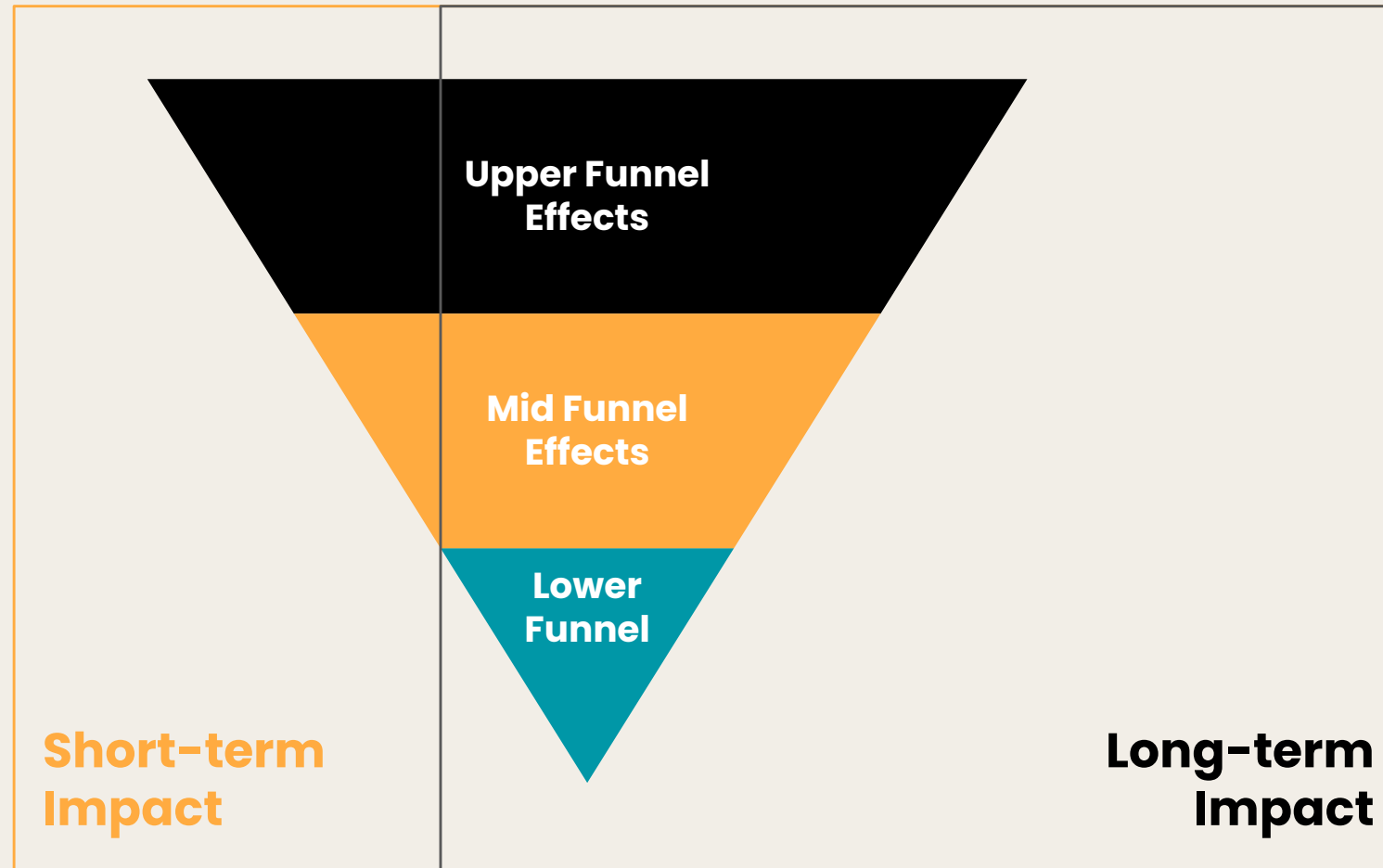
Mid Funnel Effects

Brand Persuasion, Consideration, Favourability, Perceptions: Changing how people think and feel about the brand

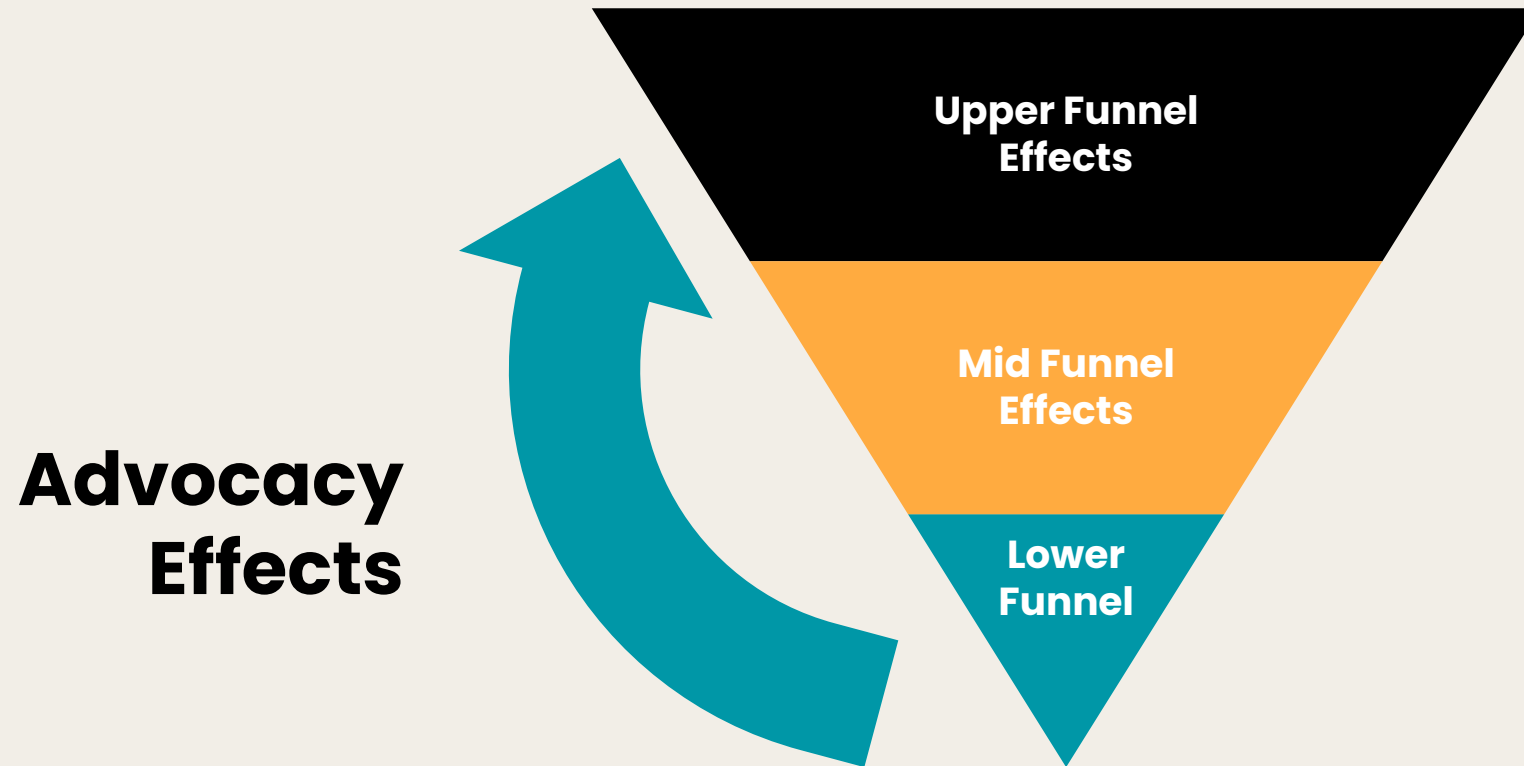
Lower Funnel

Purchase Intent, Usage Intent: Getting people to say that they are more likely to buy the brand next time around

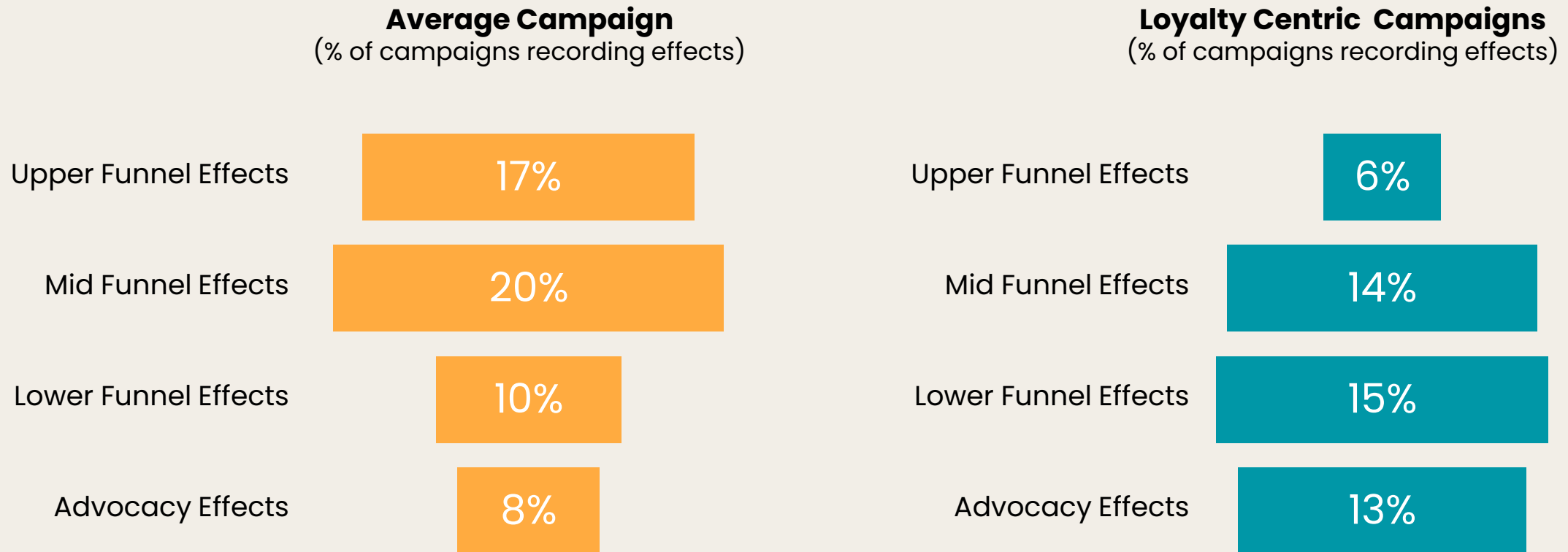
A lot of brand building is about stimulating future demand



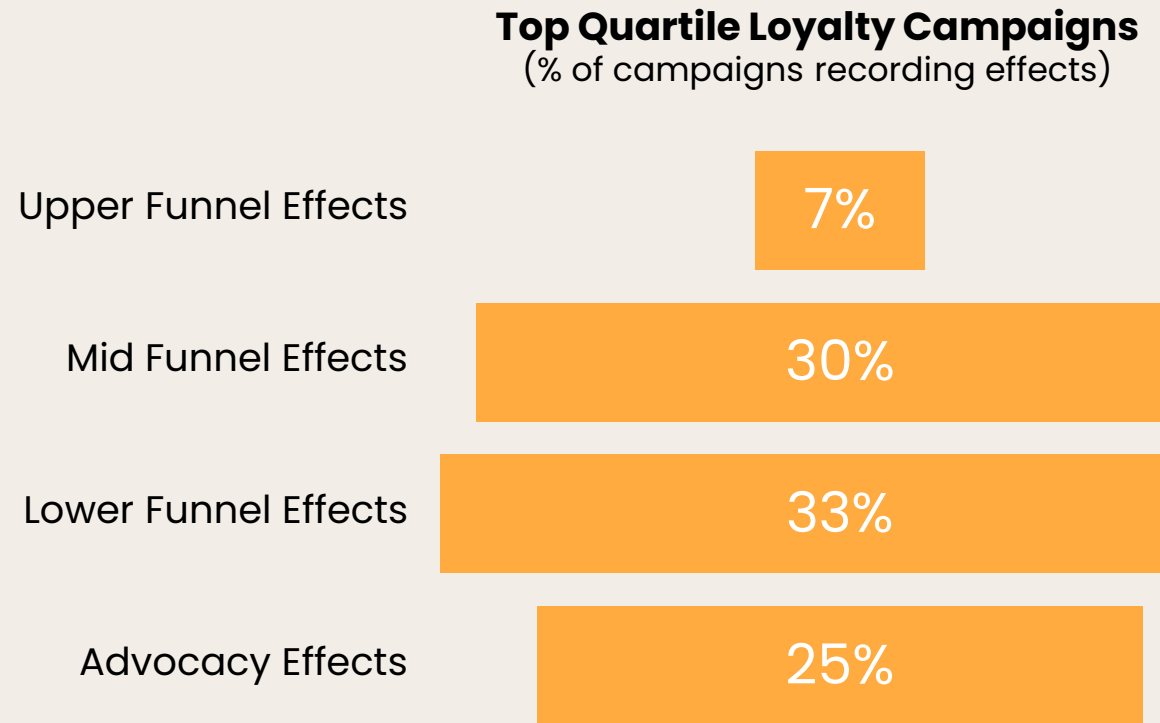
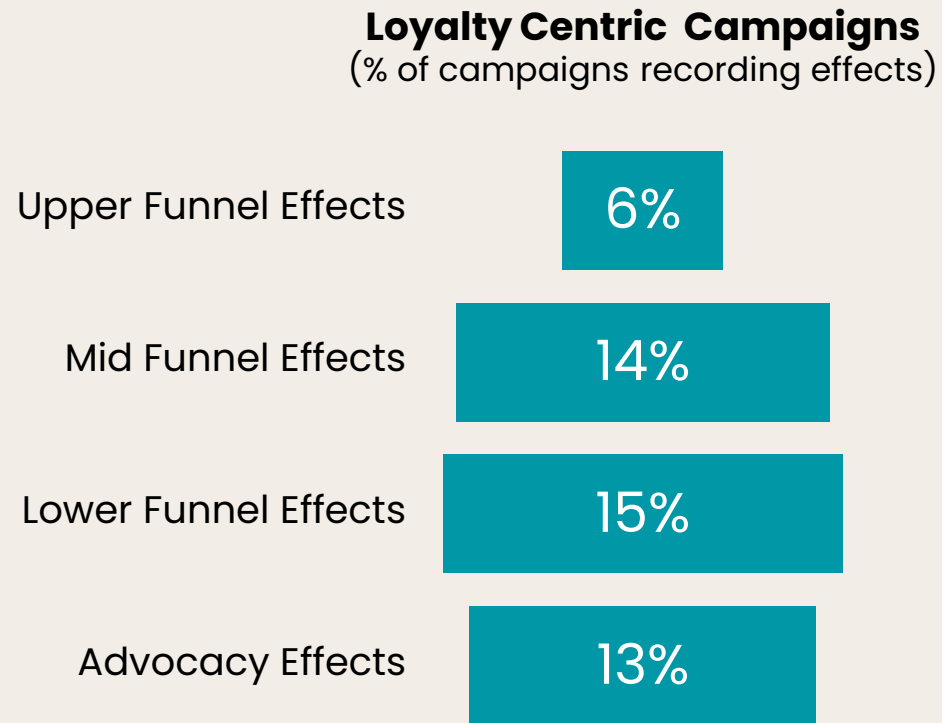
If you get brand building right, buyers will become advocates and contribute to upper funnel objectives



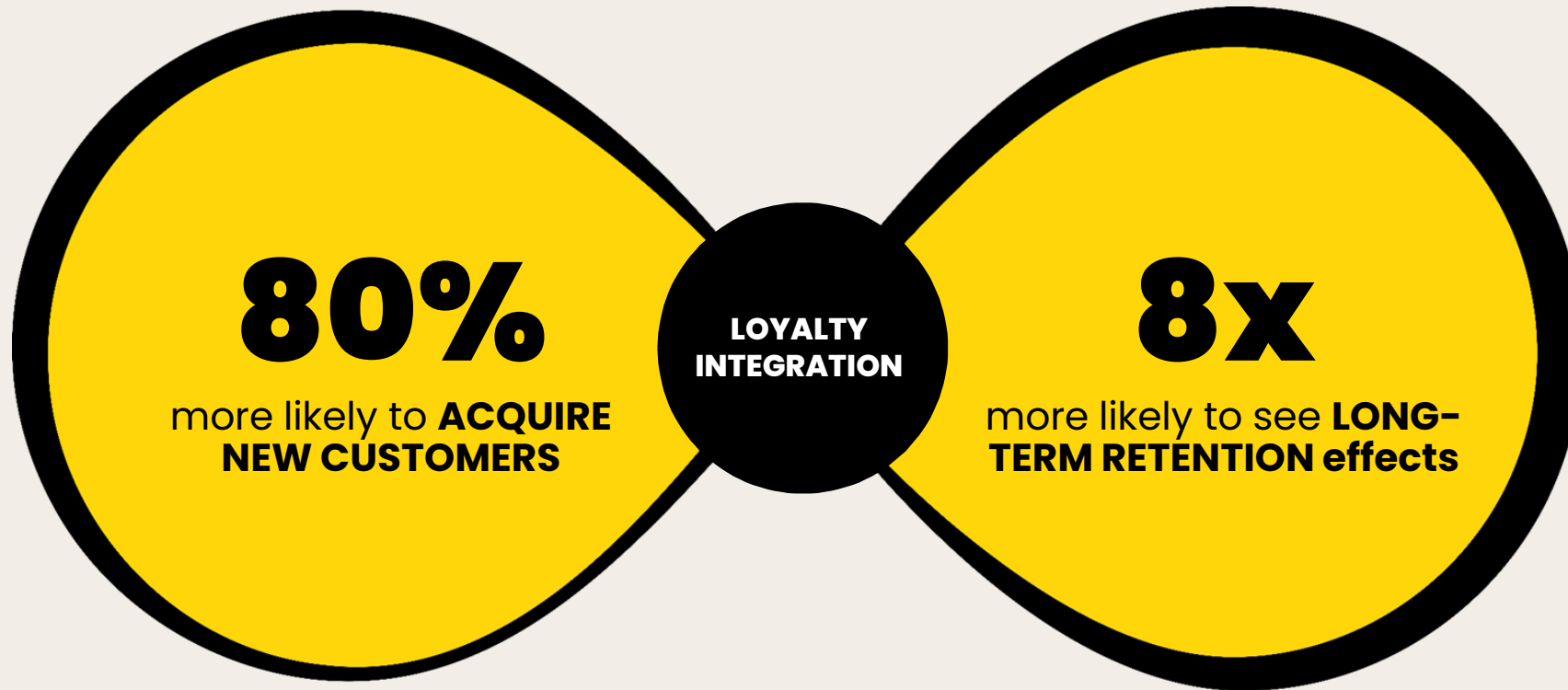
Loyalty campaigns show significant mid and lower funnel brand impact



Loyalty superbrands work even harder



We see a significant multiplier effect for loyalty integration

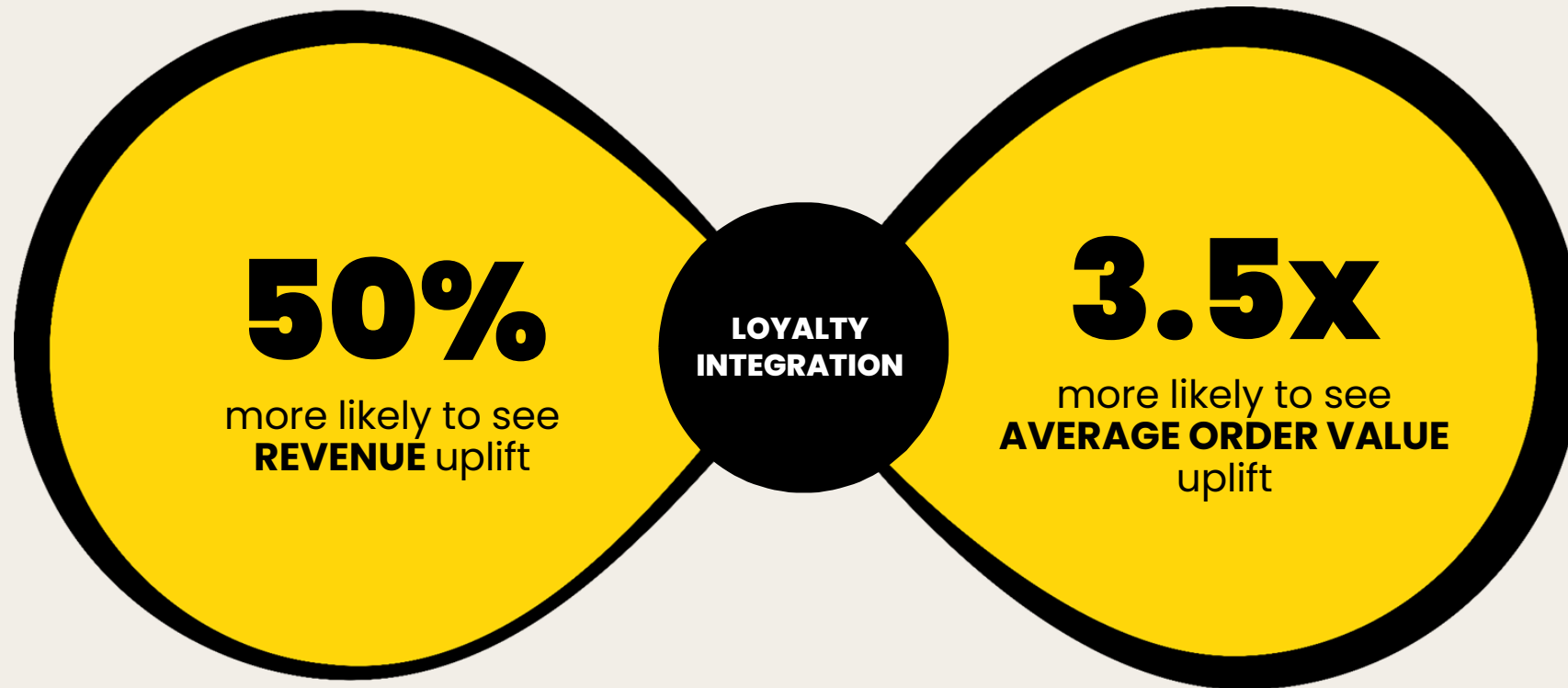


Loyalty X Factor





Accompanied by important
revenue effects



Loyalty X Factor



Top 20 Brands with the Loyalty X Factor

AVANTI
WEST COAST


advantage card



currys

 dobbies
garden centres

HACKETT
LONDON

halfords



LAKELAND



Pets
at Home

RALPH LAUREN



very

simply be.

sky

TESCO
CLUBCARD

PRIORITY

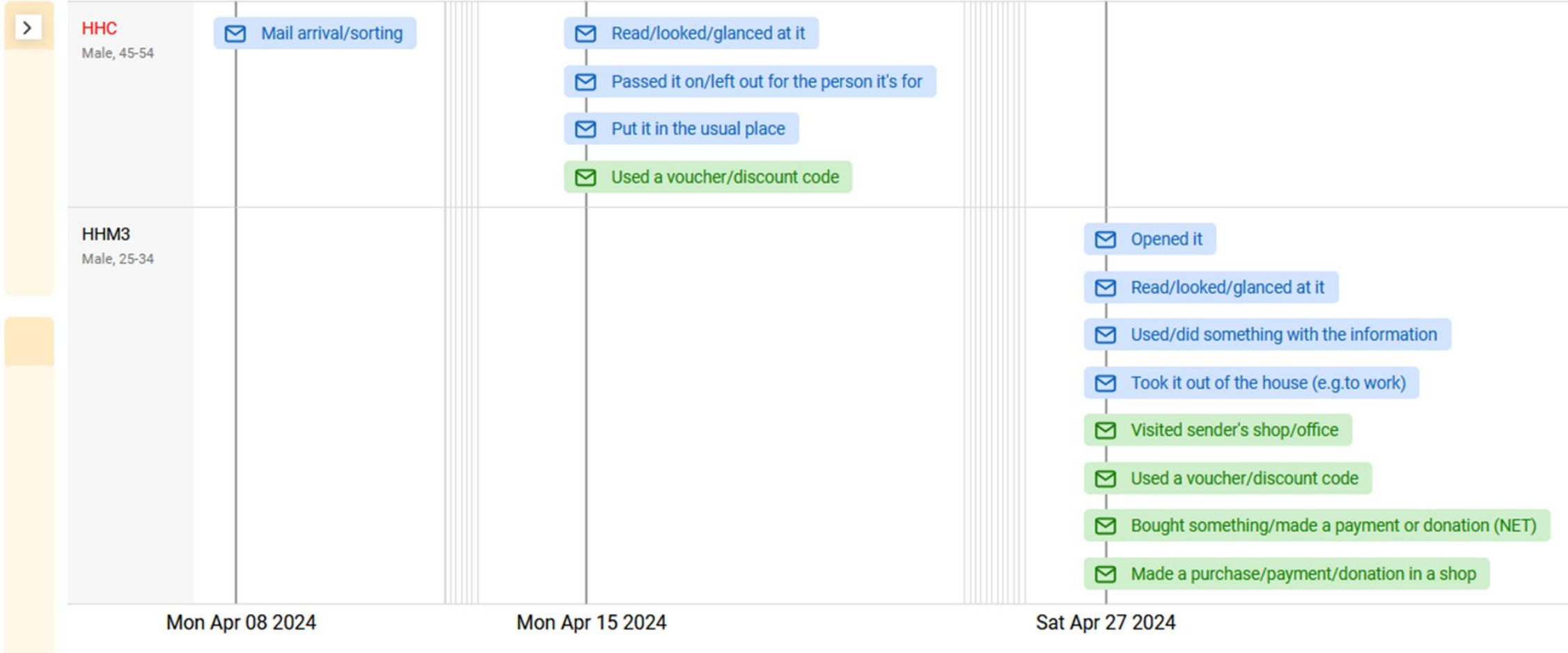


Many of these brands have used mail to grow loyalty



Loyalty mail that is shared in home and prompts purchase

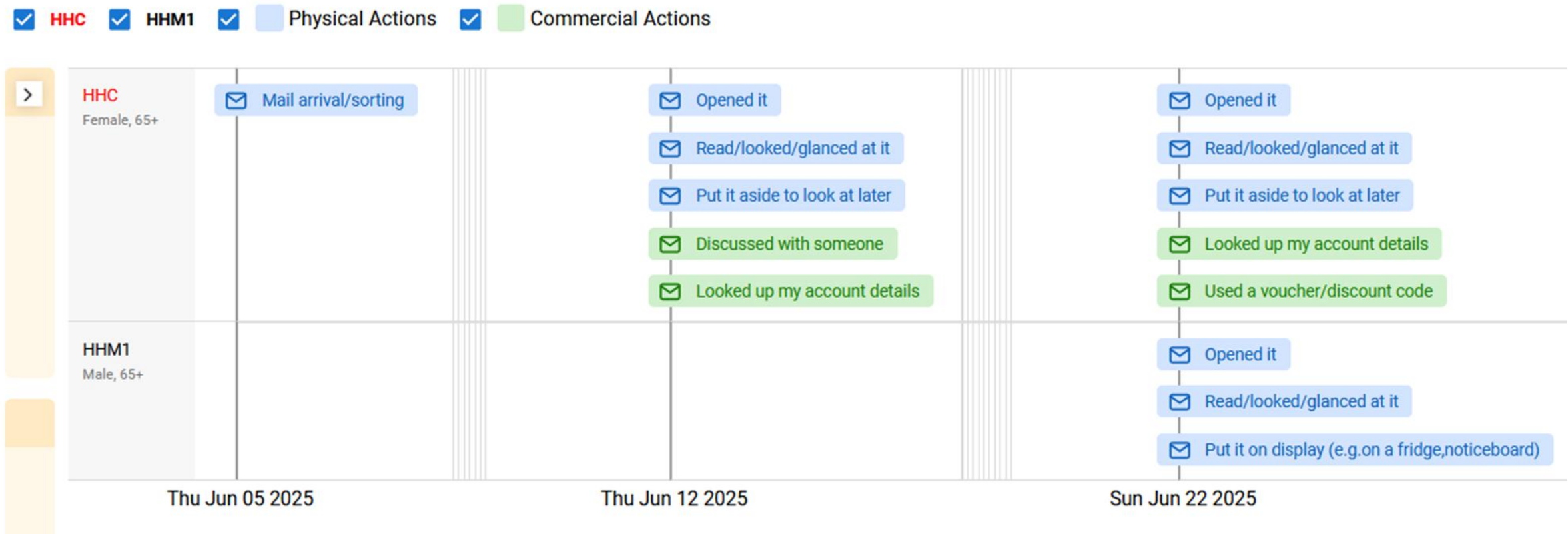
✓ HHC ✓ HHM3 ✓ Physical Actions ✓ Commercial Actions



Loyalty schemes become brands in their own right



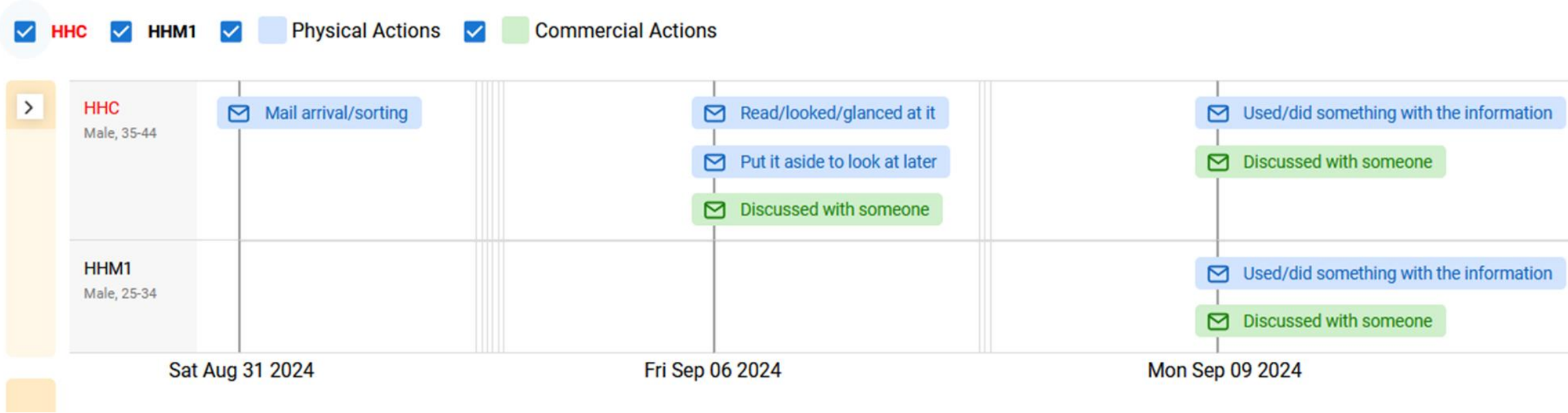
Loyalty mail that prompts discussion



Where synergies exist....



Mail appeals to younger audiences too



WHAT GIVES BRANDS THE **LOYALTY X FACTOR?**



Let's hear it from the humans

The screenshot displays the Okay Human interface. On the left, a vertical sidebar contains a 'QUESTIONS' menu with 11 numbered items (1-11). The main area features a grid of user testimonials, each with a profile picture, name, location, and a short quote. The testimonials are arranged in three rows: Row 1 (Val, Hannah, Gillian), Row 2 (Bryan, Bryan, a woman), and Row 3 (Bryan, Fiona, Linda). On the right side, there is a list of 'buckets' or categories, each with a title, a row of user avatars, a count, and a 'NEW' button. The buckets are: 'MANY CONSUMERS ...' (+3), 'A MAJOR SOURCE OF...' (+2), 'THEY WANT TO PAY I...' (+1), 'FAVORITE LOYALTY ...' (+2), 'BRANDS CAN GET E...' (+2), and 'THE BEST LOYALTY S...' (NEW). At the bottom right, a text box says 'Click here or drag cards to create buckets.'

QUESTIONS

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11

Testimonials:

- Val** United Kingdom
My vision councillor is called Emma She comes takes me to group meetings Where every...
- Hannah** United Kingdom
Things are different because you can get points for the food that you shop. It's good for...
- Gillian** United Kingdom
I was with a friend in Costa coffee. I had a fall previously and leg was still weak so one of the...
- Bryan** United Kingdom
I think that would be the Co-op. The people in the shop are very friendly and because it's a small shop...
- Bryan** United Kingdom
The Co-op membership scheme is much more than money. It's a whole community which tells...
- Fiona** United Kingdom
Premier store at the end of my road i fell outside and they brought me a pillow and blanket till th...
- Linda** United Kingdom
Tesco feels like it has your well being at heart. It gives you ideas for healthy eating as well as...

Buckets:

- MANY CONSUMERS ...** +3 NEW
- A MAJOR SOURCE OF...** +2 NEW
- THEY WANT TO PAY I...** +1 NEW
- FAVORITE LOYALTY ...** +2 NEW
- BRANDS CAN GET E...** +2 NEW
- THE BEST LOYALTY S...** NEW

Click here or drag cards to create buckets.

Superior Proposition



Bryan
United Kingdom



The Co-op membership scheme is much more than money. It's a whole community which tells you how to get involved with not just the store but the local community and does activities to bring people together all the time.



Craig
United Kingdom

I would explain it like having an online family that you can choose. Having people who understand you as well as constructively criticize you. Being part of a community is great for mental health and improving your socializing so has great benefits



Members feel closer to the brand through personal human connection and a feeling of belonging – valued in a society plagued by loneliness.

Superior Intelligence



Chris
United Kingdom

I had a great moment with them when my mate was going thru a hard time and I payed his car insurance for him with Tesco points



Emma-jane
United Kingdom

I also like travel loyalty cards as well like virgin Atlantic! It lets me have dreams of the next holiday I want to book



People's favourite loyalty programmes go beyond a transactional relationship, and motivate them with 'emotional credit'.

Superior Experience



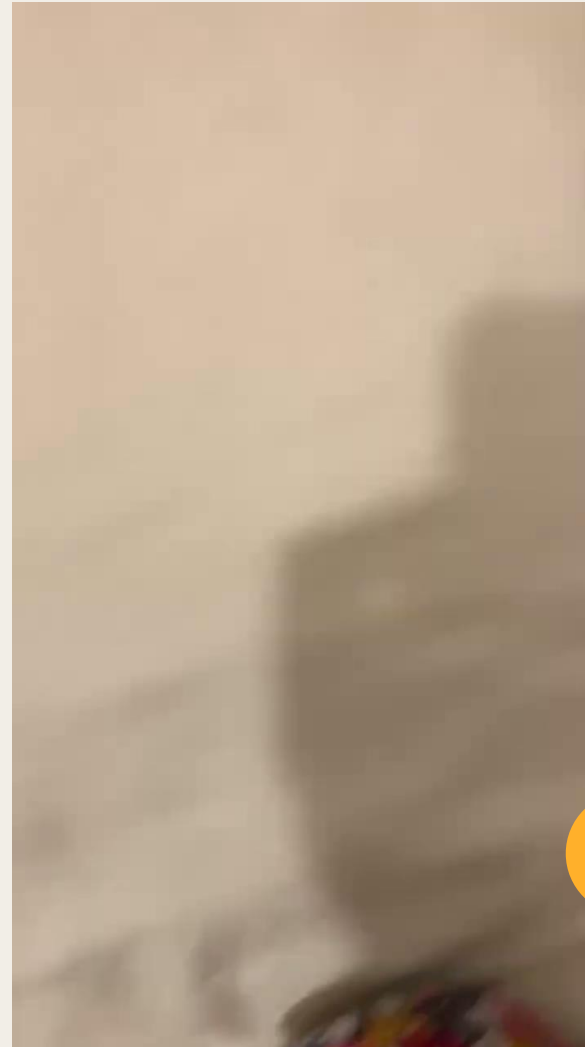
Linda
United Kingdom

I like my Tesco club card as I feel that they help me personally, not just generally. Not only does it save me money, but their site is full of ideas for meals, days out money saving tips and seasonal ideas



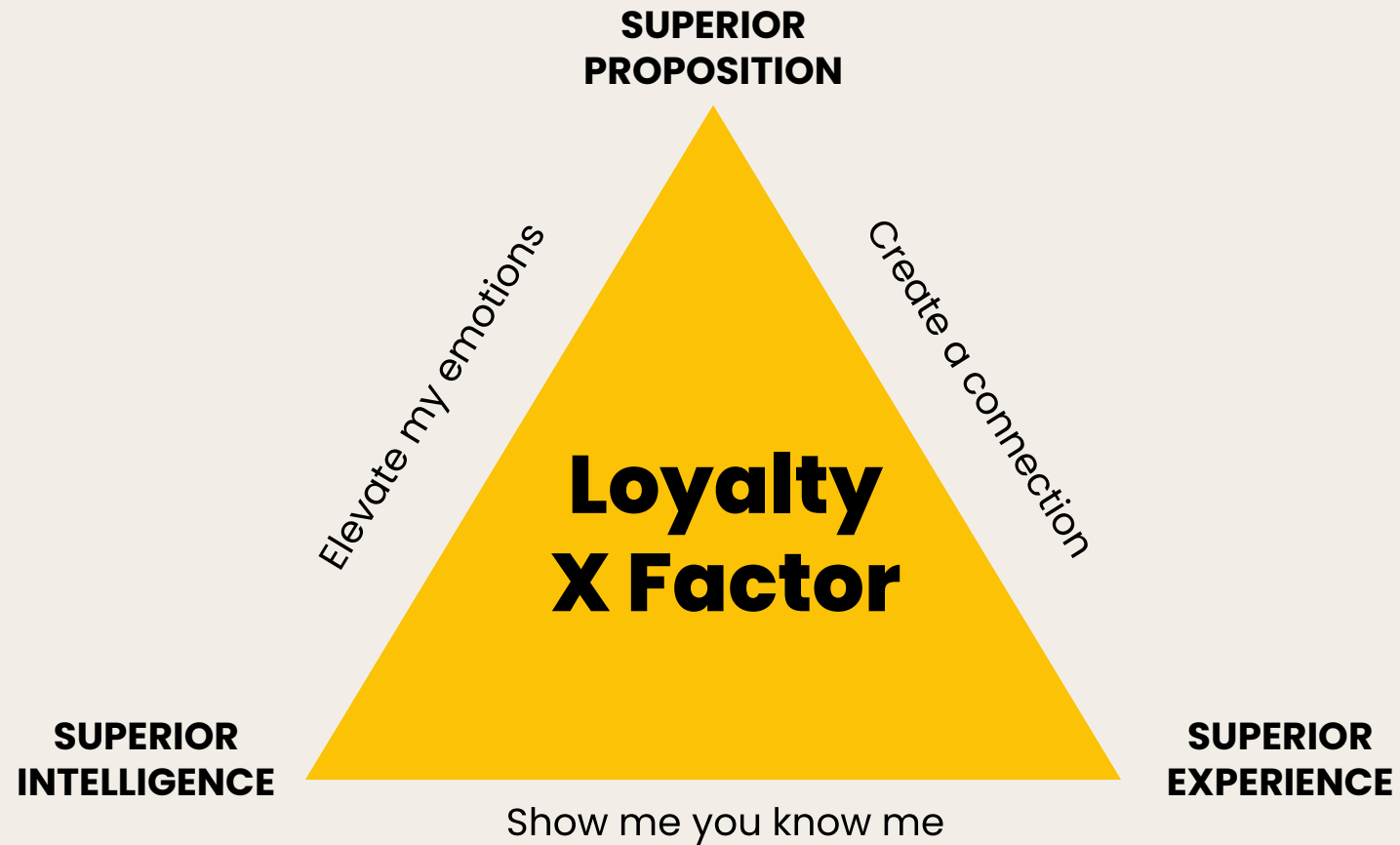
Emma-jane
United Kingdom

I like Lidl as it recognises your shopping habits and enticed you with various discounts on products you have already bought previously



People love it when loyalty programmes enhance discovery at an individual level, get personalization right and feel this across online/offline touchpoints.

A model for creating the Loyalty X Factor



Don't get left behind, create the Loyalty X Factor

Loyalty campaigns
32%
more effective overall

DOUBLE
brand effects post-
covid

Loyalty campaigns
80%
more likely to
ACQUIRE

Loyalty campaigns
8x
more likely to RETAIN



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**JIC
MAIL**

Mail Media Metrics

Door Drop Nuts and Bolts in Leeds 23 September

When & Where?

Tuesday, 23rd September
2025

09:00 - 11:00

Everyman Leeds
Level 4, Trinity, Albion St,
Leeds
West Yorkshire
LS1 5AY
United Kingdom

Ticket Information

Member

Free

Non Member

£149 (+VAT)

Door Drops: Nuts and Bolts

[Book Now](#)