

JICMAIL Quarterly Results

Q4 2025



**JIC
MAIL**

Mail Media Metrics



Mail's Super Touchpoint Strengths in Q4 2025

 **4.50**

Frequency of Direct Mail interaction. Read rates for all mail up to 77%.

 **6%**

Of all mail prompts a purchase.

 **16%**

of mail triggers an in-home discussion

 **202 secs.**

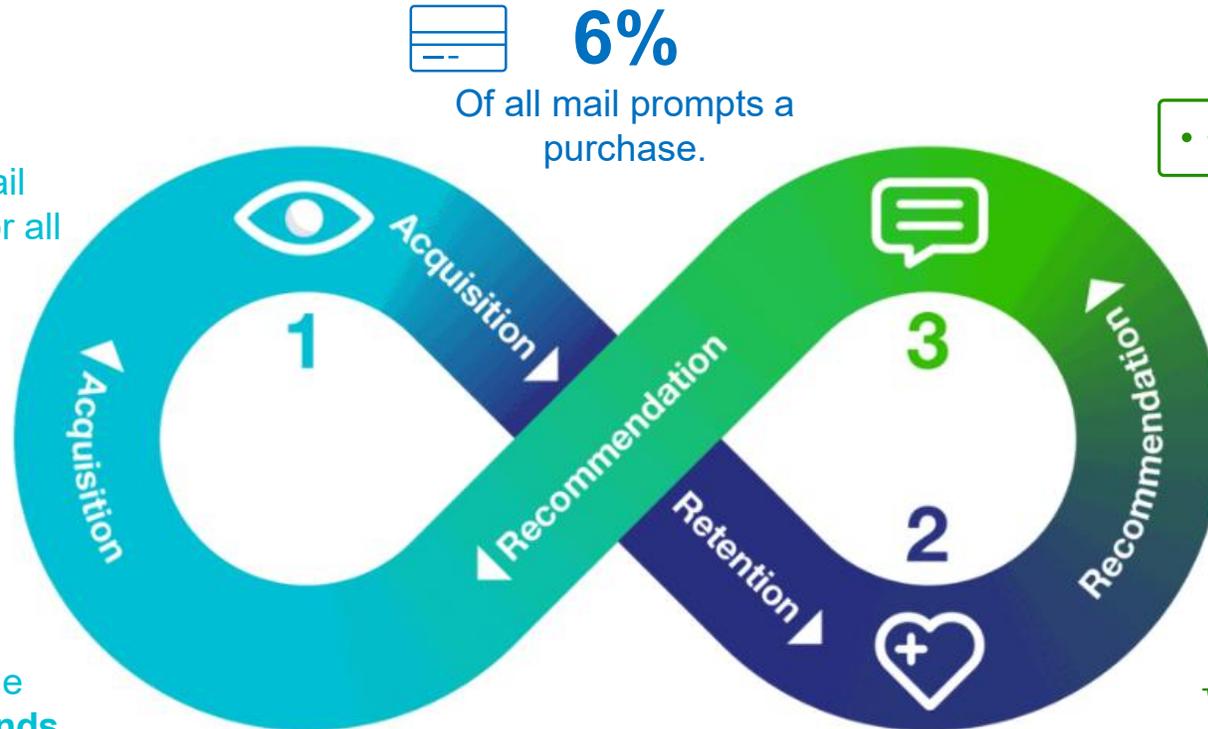
Spent with the average catalogue vs. **143 seconds** for DM and **58 seconds** for Door Drops

 **9.7%**

of mail prompts a website visit: surpassing the record set during Covid

 **89%**

Of discarded mail is recycled: highest reading to date





Mail Engagement

Mail engagement has trended upwards across many key metrics, with attention up across DM, Door Drops and Business Mail in Q4. Catalogues display the highest attention scores at over 200 seconds per item.



Mail Effectiveness

Mail drove record levels of digital traffic in Q4 – surpassing the record set in the previous quarter. The proportion of mail prompting purchases increased to 6%. New analysis of catalogues reveals that they are predominately effective at driving in-store as opposed to online purchases. Direct Mail is number one for driving online purchases.



Mail Audiences

25-34 year olds have been displaying increased engagement with mail throughout 2025. JICMAIL has announced an integration with TGI data to introduce mail exposure and frequency metrics across 300+ new audiences on an ongoing basis.

Mail Engagement Q4 2025

Reach, Frequency, Lifespan and Attention

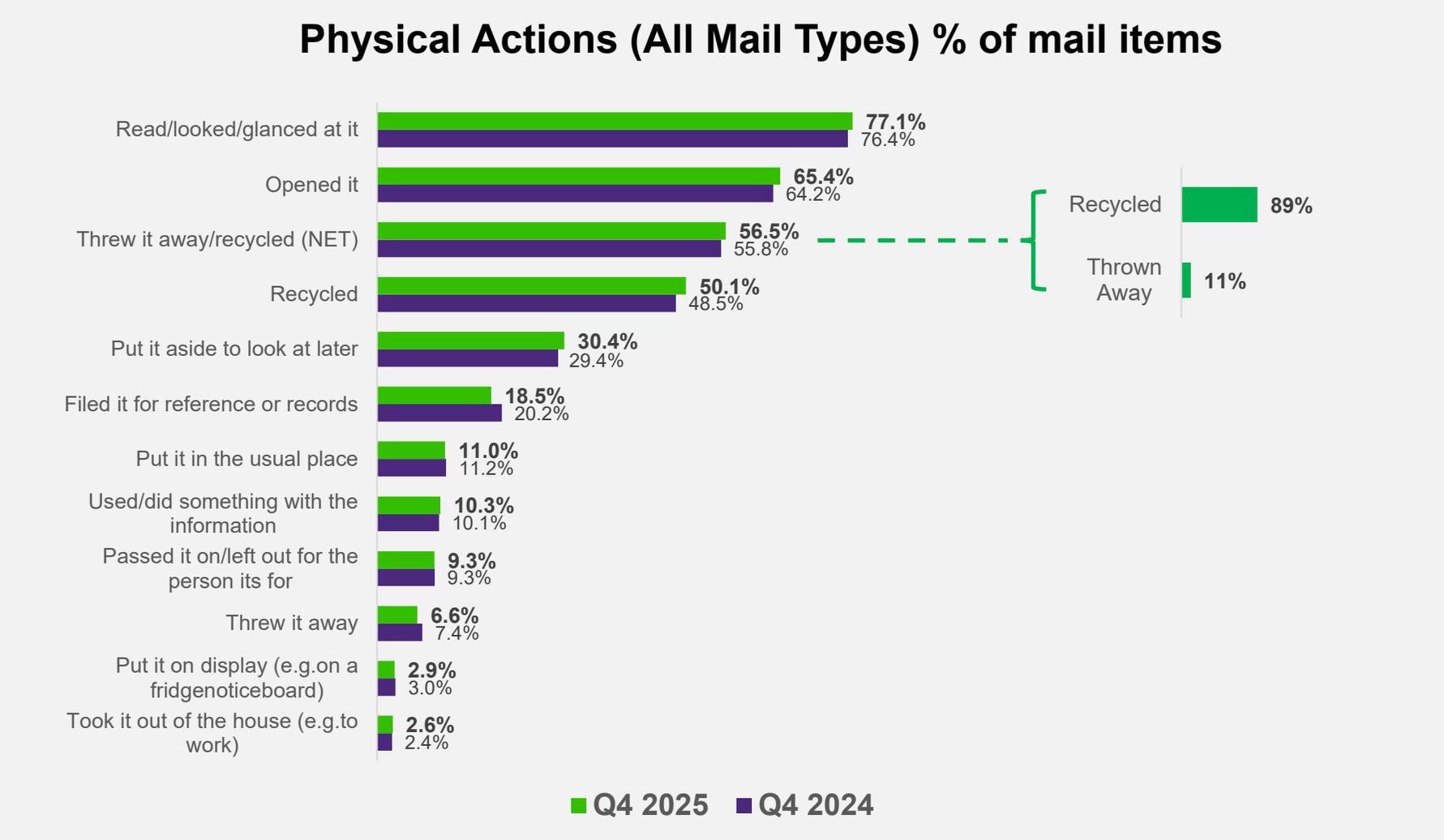


Mail Media Metrics

Open, read and recycle rates all up year on year in Q4 2025

Q4 2025 was a quarter of growing mail engagement, with read rates and open rates increasing, alongside the proportion of mail put aside to look at later.

Recycling rates also increased with 89% of discarded mail now recycled.

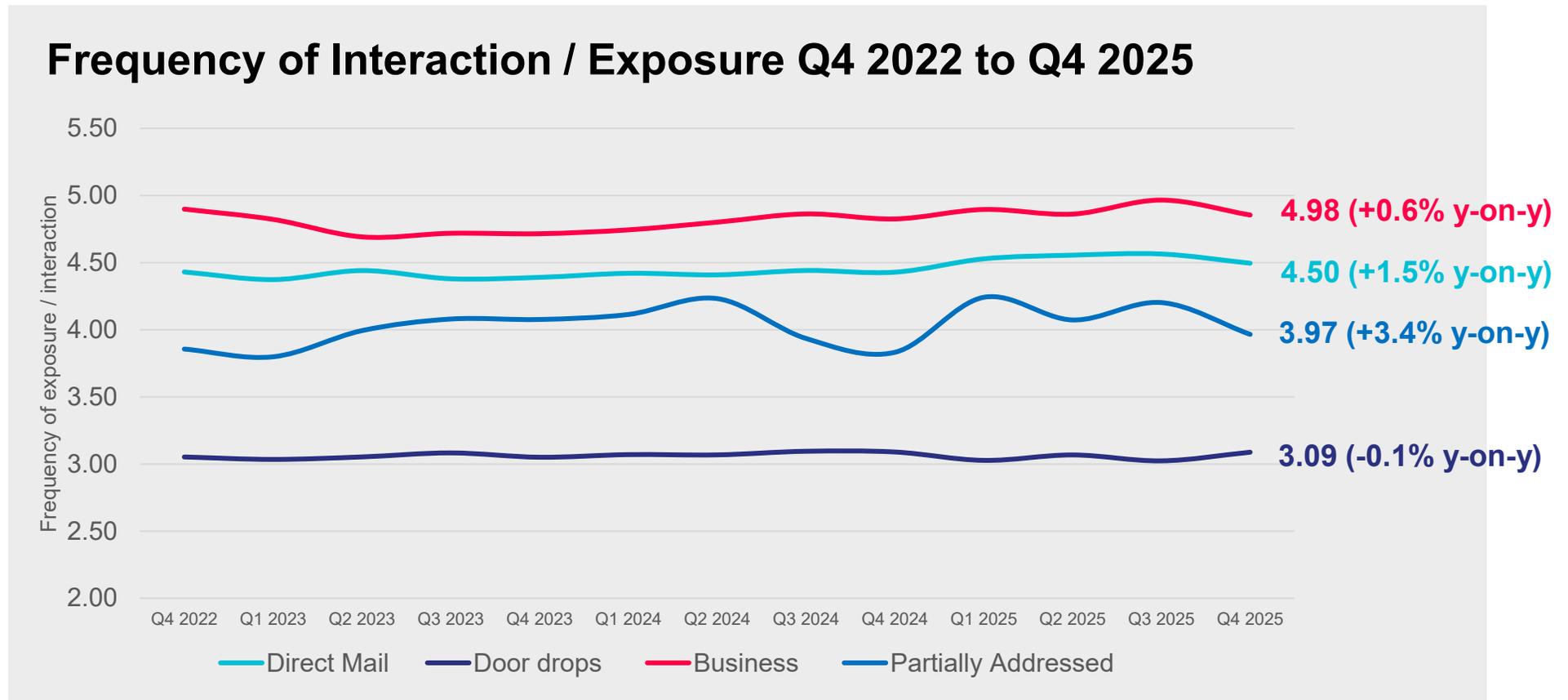


Source: JICMAIL Item Data Q4 2024 n=9,818 mail items; Q4 2025 n=9,046 mail items

Mail engagement growth either up or flat across all mail types

Those who invested in the Direct Mail channel in Q4 2025 saw the rate at which mail items converted into ad impressions increase by 1.5% year.

Business Mail frequency of interaction continued to climb to a new five-year-high off 4.98 actions across a 28-day period.

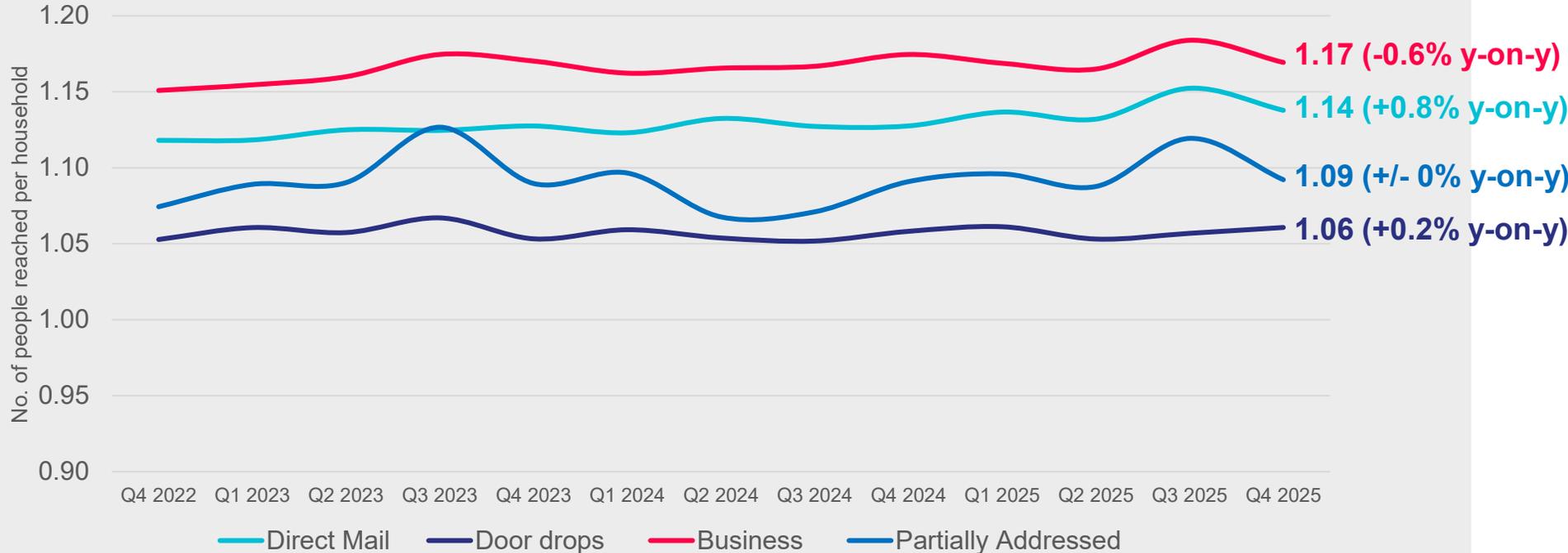


Source: JICMAIL Item Data Q4 2022 to Q4 2025 n=133,336 mail items

Mail sharing rates stable year on year

Item Reach (the number of people in the household exposed to the average mail item) is stable year on year. 100 Business Mail items reach an additional 17 people, Direct Mail an additional 17 people, Partially Addressed an additional 14 people, and Door Drops plus 6 people.

Item Reach in the Household Q4 2022 to Q4 2025

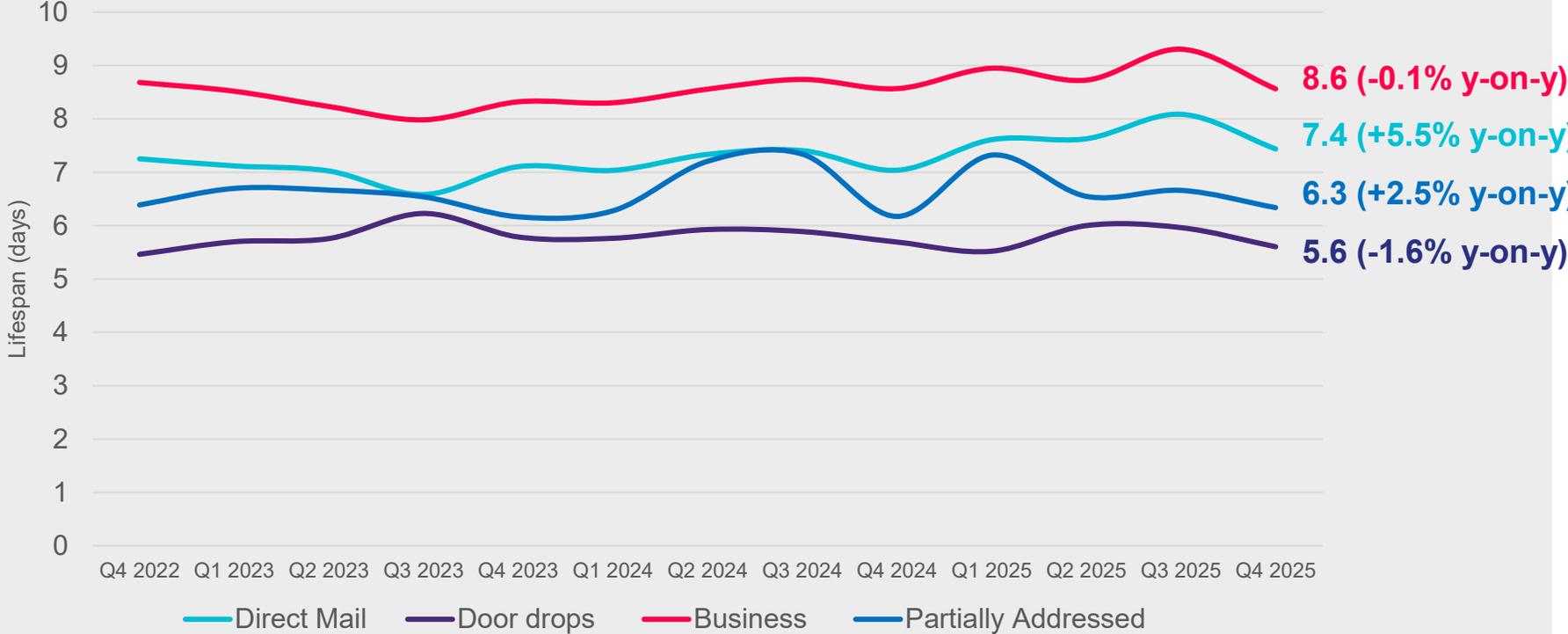


Source: JICMAIL Item Data Q4 2022 to Q4 2025 n=133,336 mail items

Lifespan up year on year for Direct Mail and Partially Addressed

Direct Mail items are live in the home for 7.4 days before being discarded or filed away: a 5.5% higher lifespan than one year prior.

Lifespan (days) Q4 2022 to Q4 2025

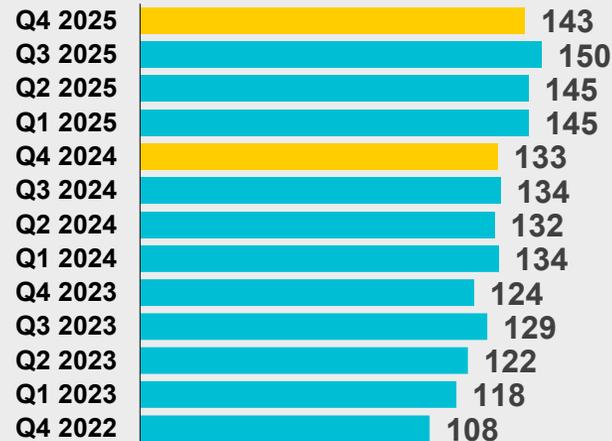


Source: JICMAIL Item Data Q4 2022 to Q4 2025 n=133,336 mail items

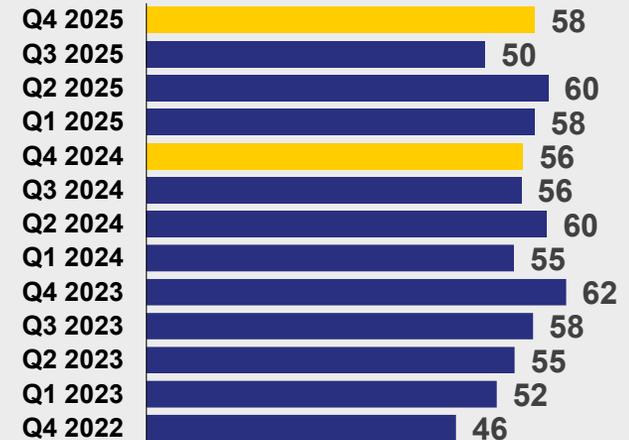
Direct Mail attention increased by 10 seconds per item year on year in Q4 2025

The average Direct Mail item was interacted with for 143 seconds by anyone in the household across a 28-day period in Q4 2025, and the average Door Drop for 58 seconds

Direct Mail Attention (seconds interacted with per item)



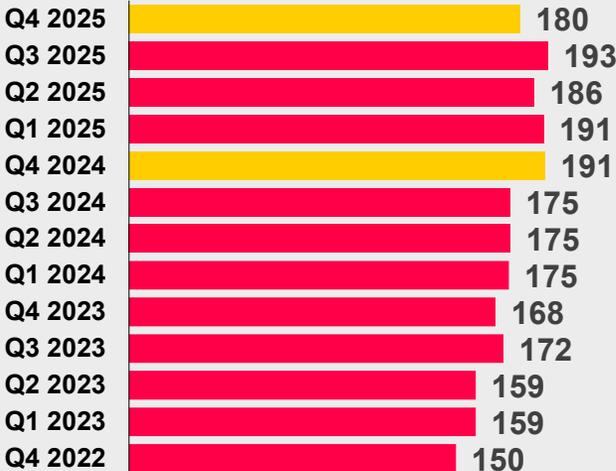
Door Drop Attention (seconds interacted with per item)



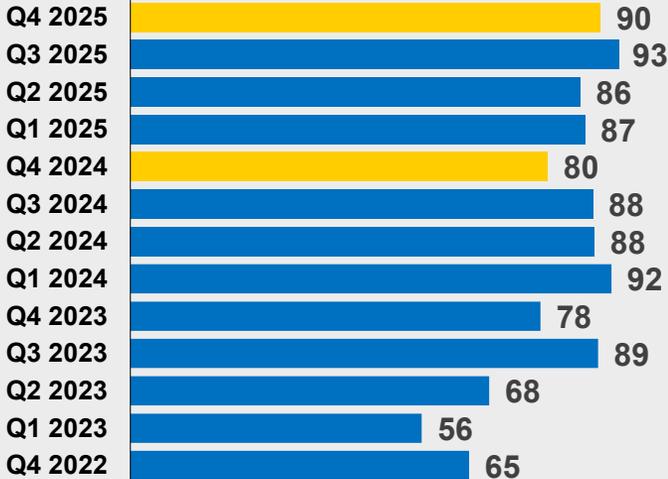
Business Mail is looked at for three minutes on average

The average Business Mail item was interacted with for 180 seconds by anyone in the household across a 28-day period in Q4 2025.

Business Mail Attention (seconds interacted with per item)

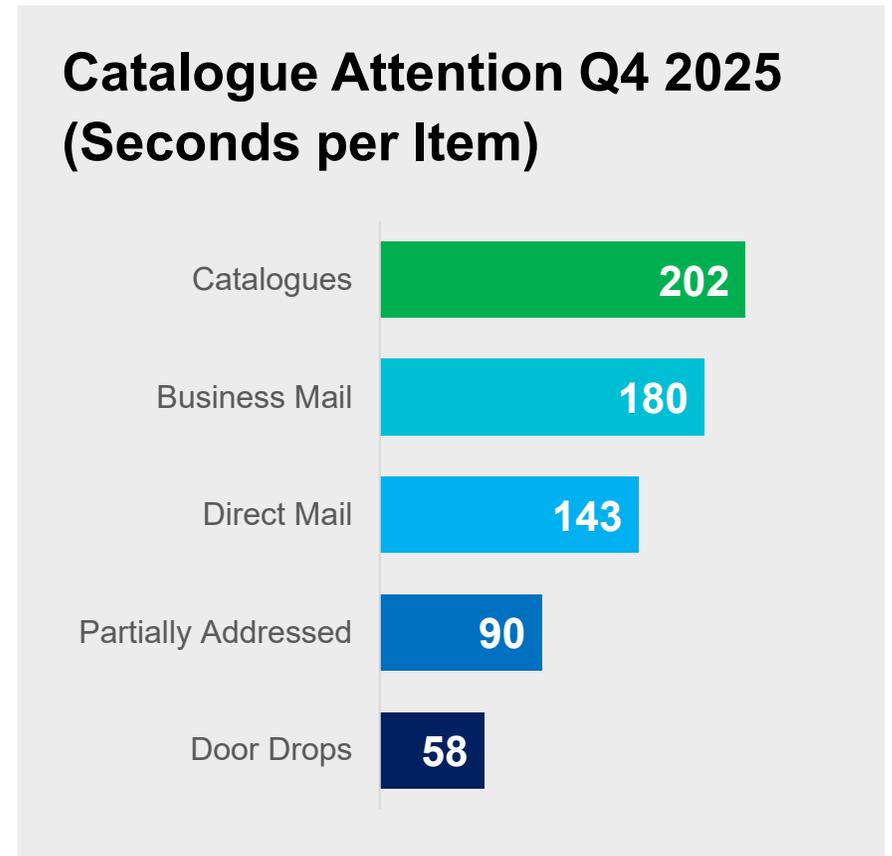
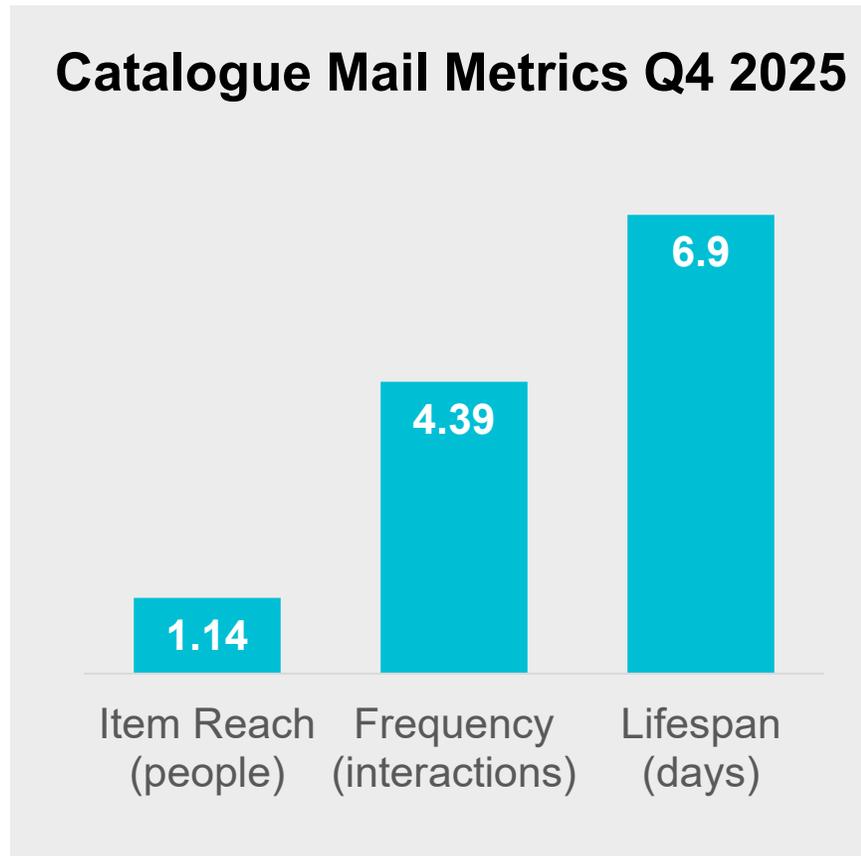


Partially Addressed Mail Attention (seconds interacted with per item)

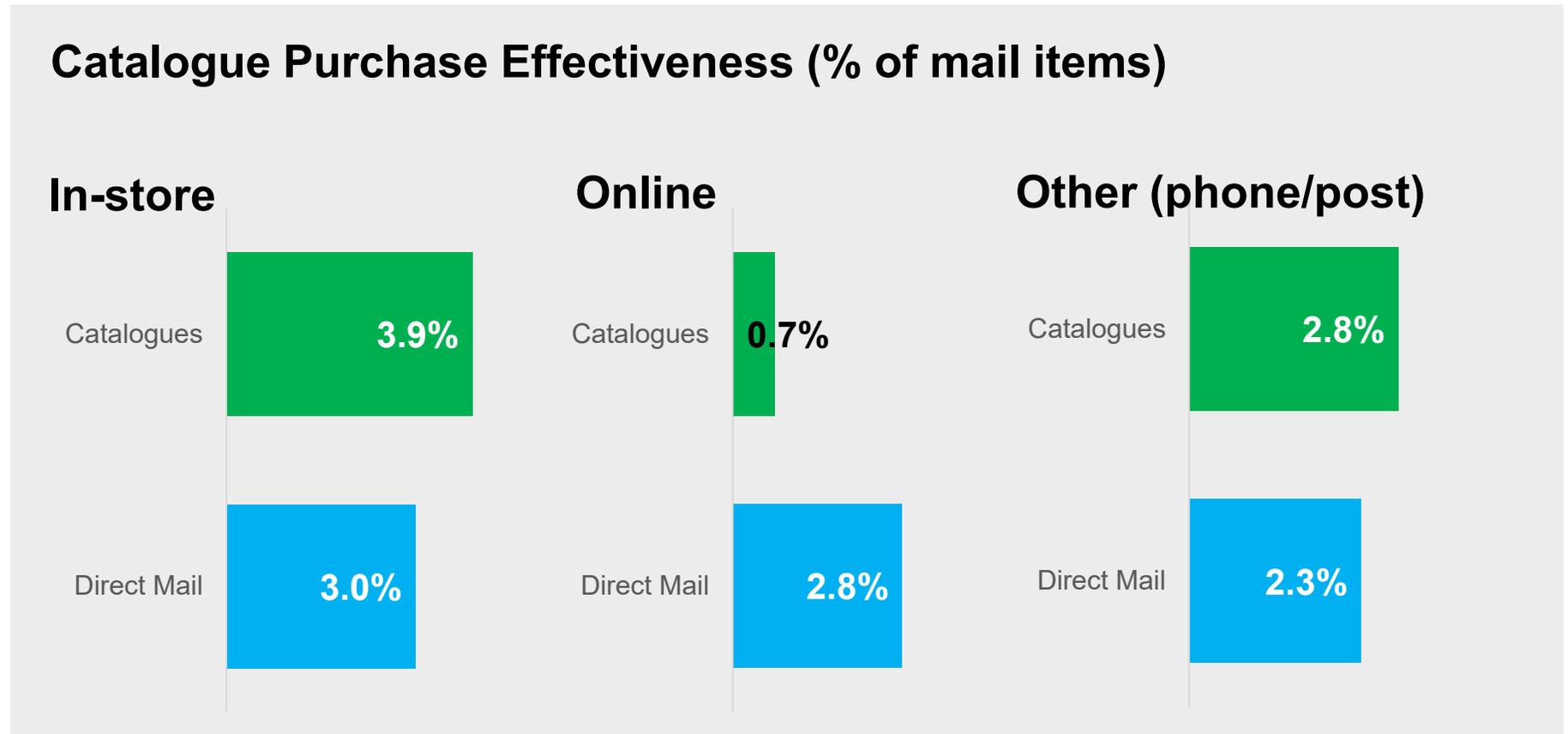
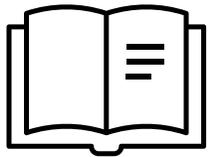


Catalogue data now available in JICMAIL Discovery

Catalogues report mail reach, frequency and lifespan broadly in line with Direct Mail. However, where catalogues offer **disproportionate performance is in their attention metrics**: the average catalogue is viewed for over 200 seconds a month on average.



Catalogues are most effective at in-store purchases



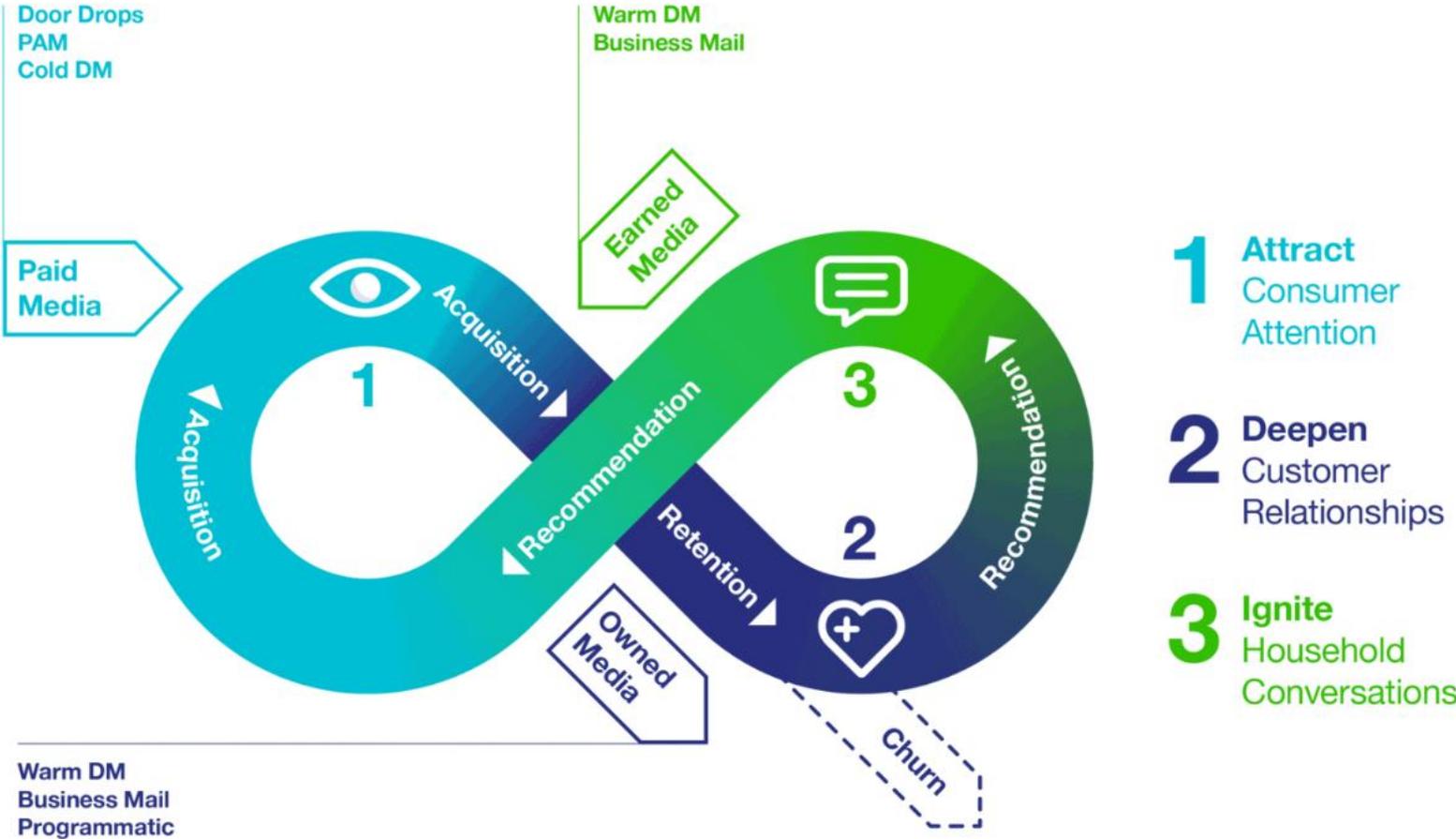
Mail Effectiveness Q4 2025

Mail's Super Touchpoint Strengths



Mail Media Metrics

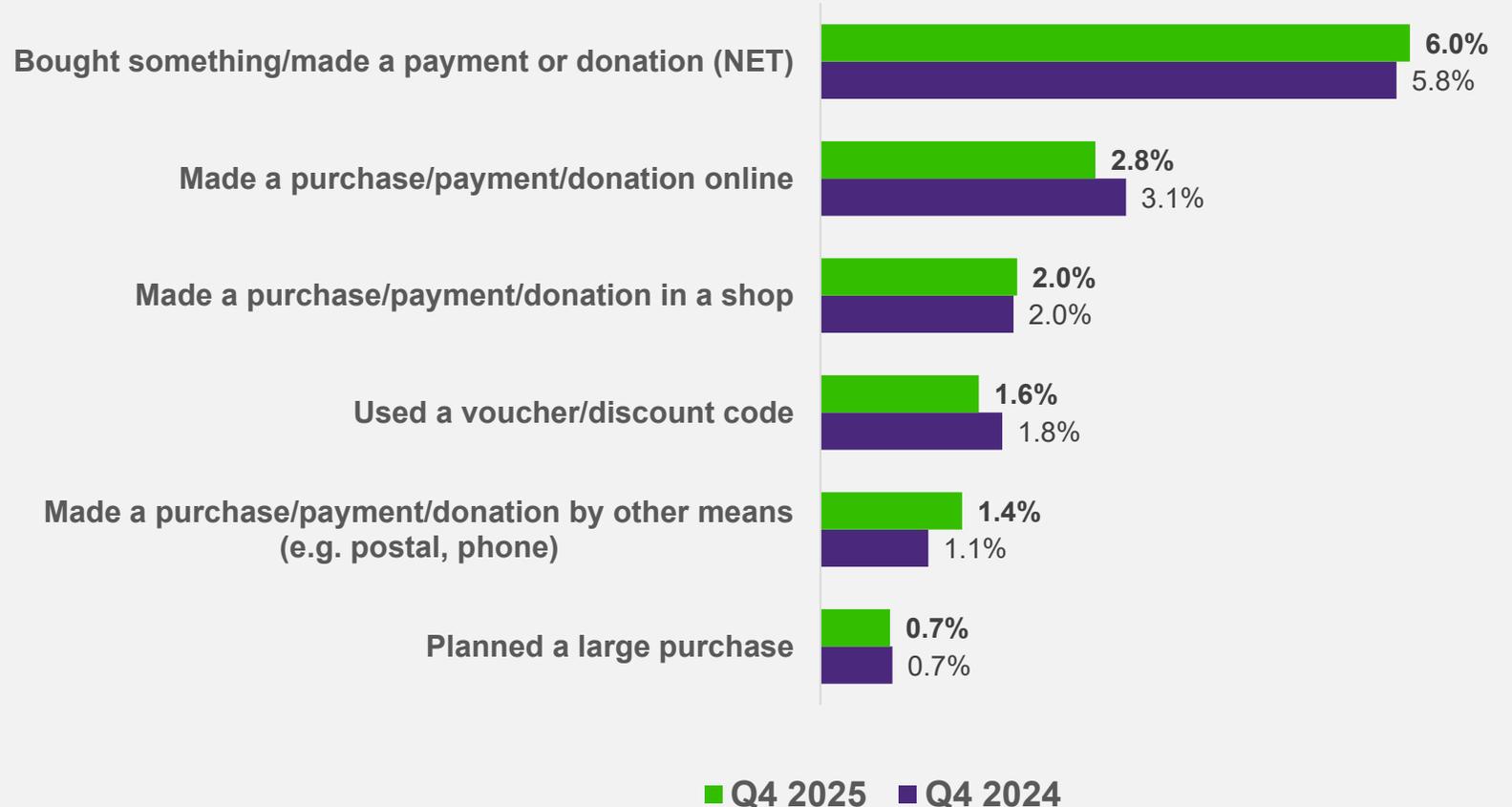
Mail drives acquisition, retention and recommendation



Mail's purchase effectiveness was up year on year in Q4 2025 with a slight shift from online to purchases made by other means ¹⁵

Customer Acquisition

Commercial Actions (All Mail Types) % of mail items



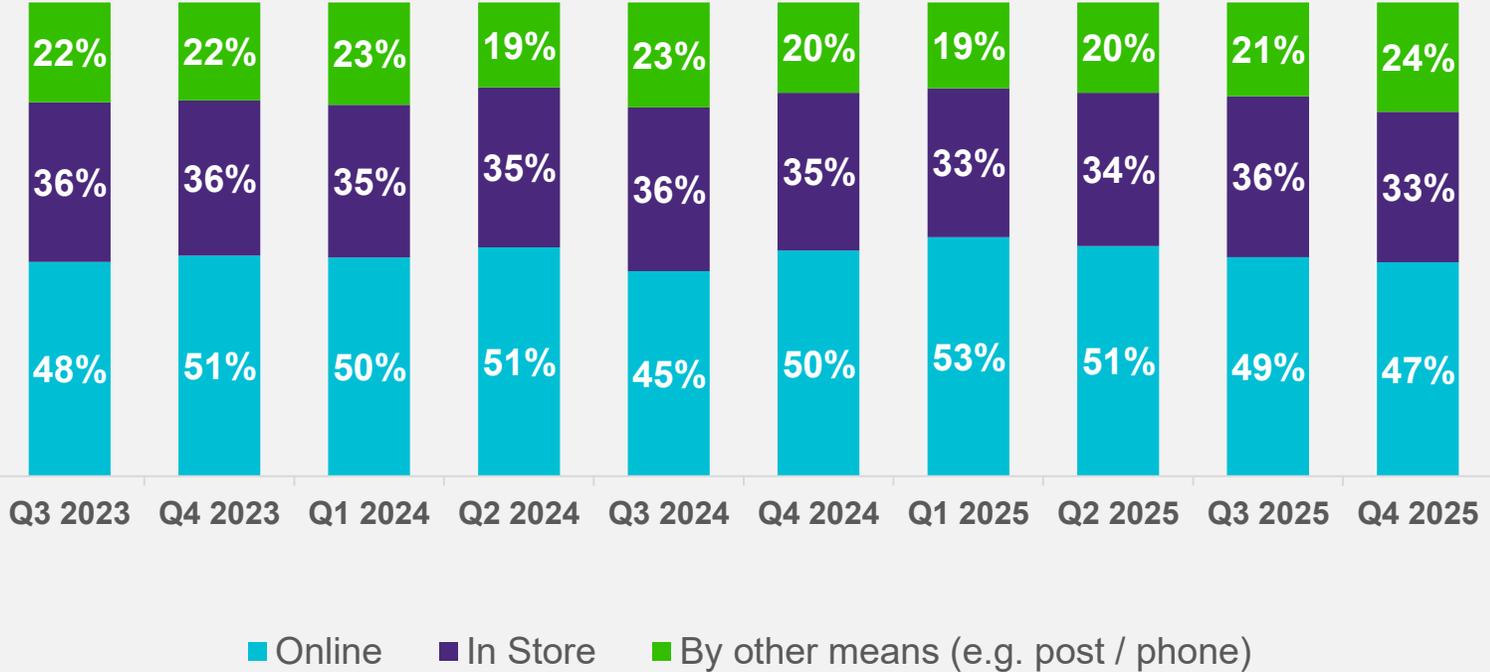
Mail Media Metrics

Nearly half of all purchases driven by mail are done so online

While digital transactions are the most common form of purchase fulfilment in the mail channel, there has been a slight up-tick in purchases and donations by other means (e.g. phone and post) in Q4 2025. Increased Government addressed mail volumes will have played a role here.

Purchases by Channel

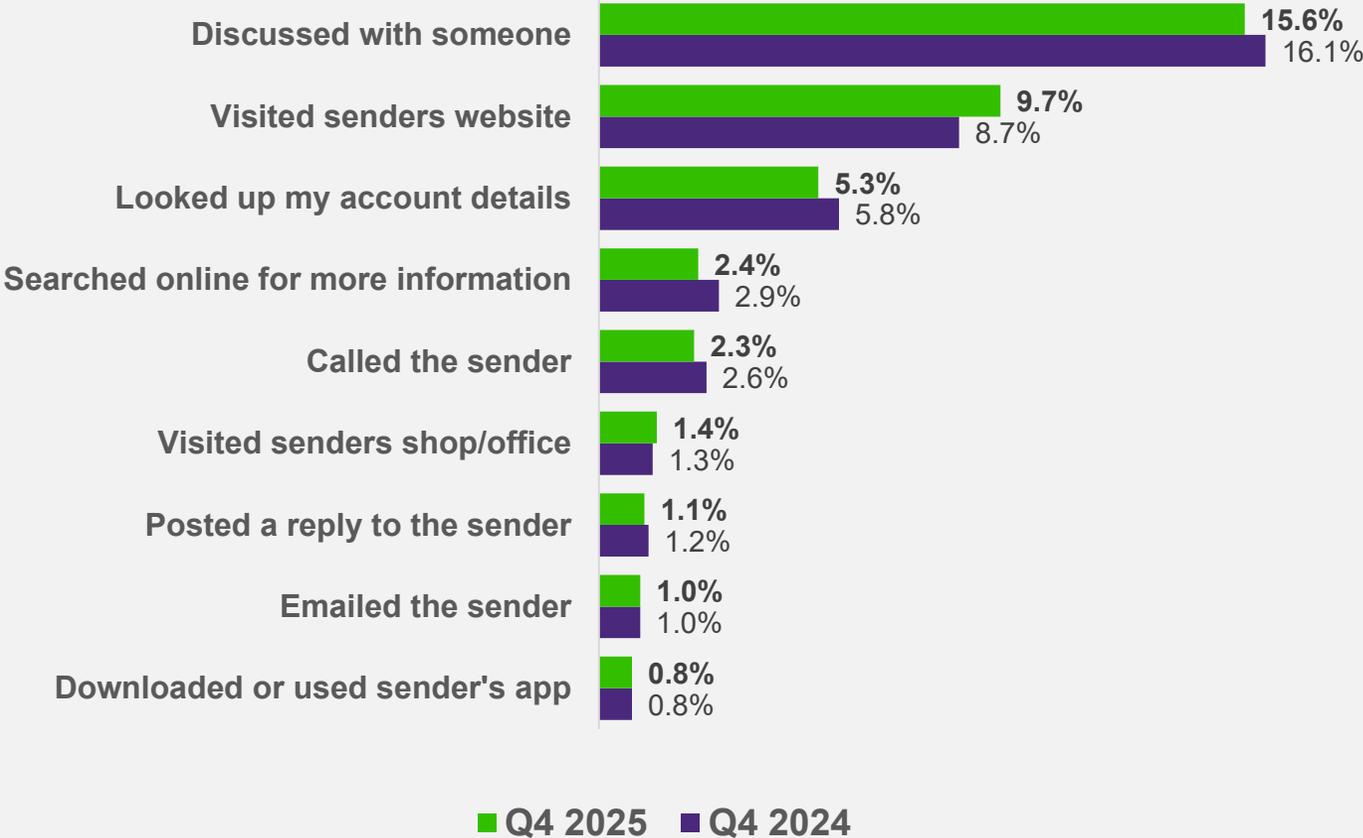
(base: % of DM, Door Drop and Business Mail items prompting a purchase)



Website visits as a result of mail receipt up year-on-year

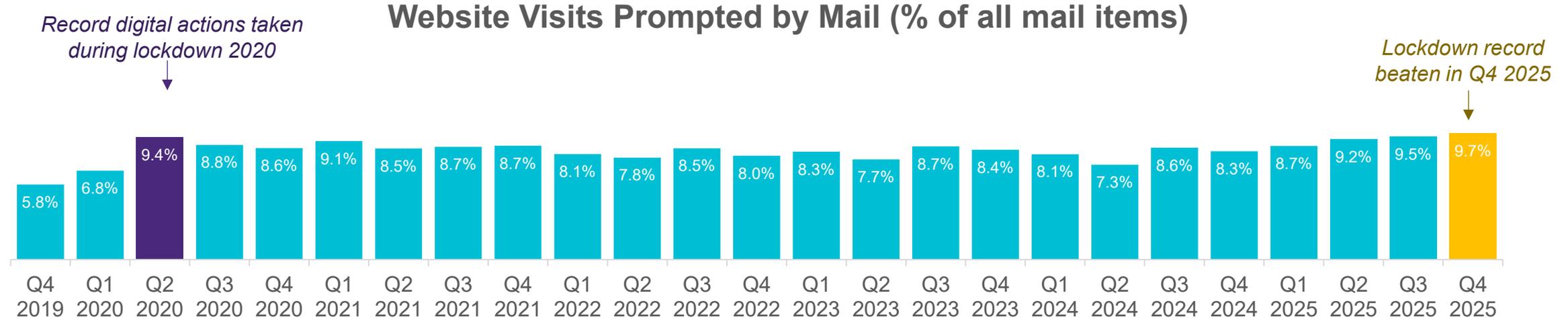
Customer Retention and Recommendation

Commercial Actions (All Mail Types) % of mail items



Source: JICMAIL Item Data Q4 2024 n=9,818 mail items; Q4 2025 n=9,046 mail items

Website visits continue to reach record levels



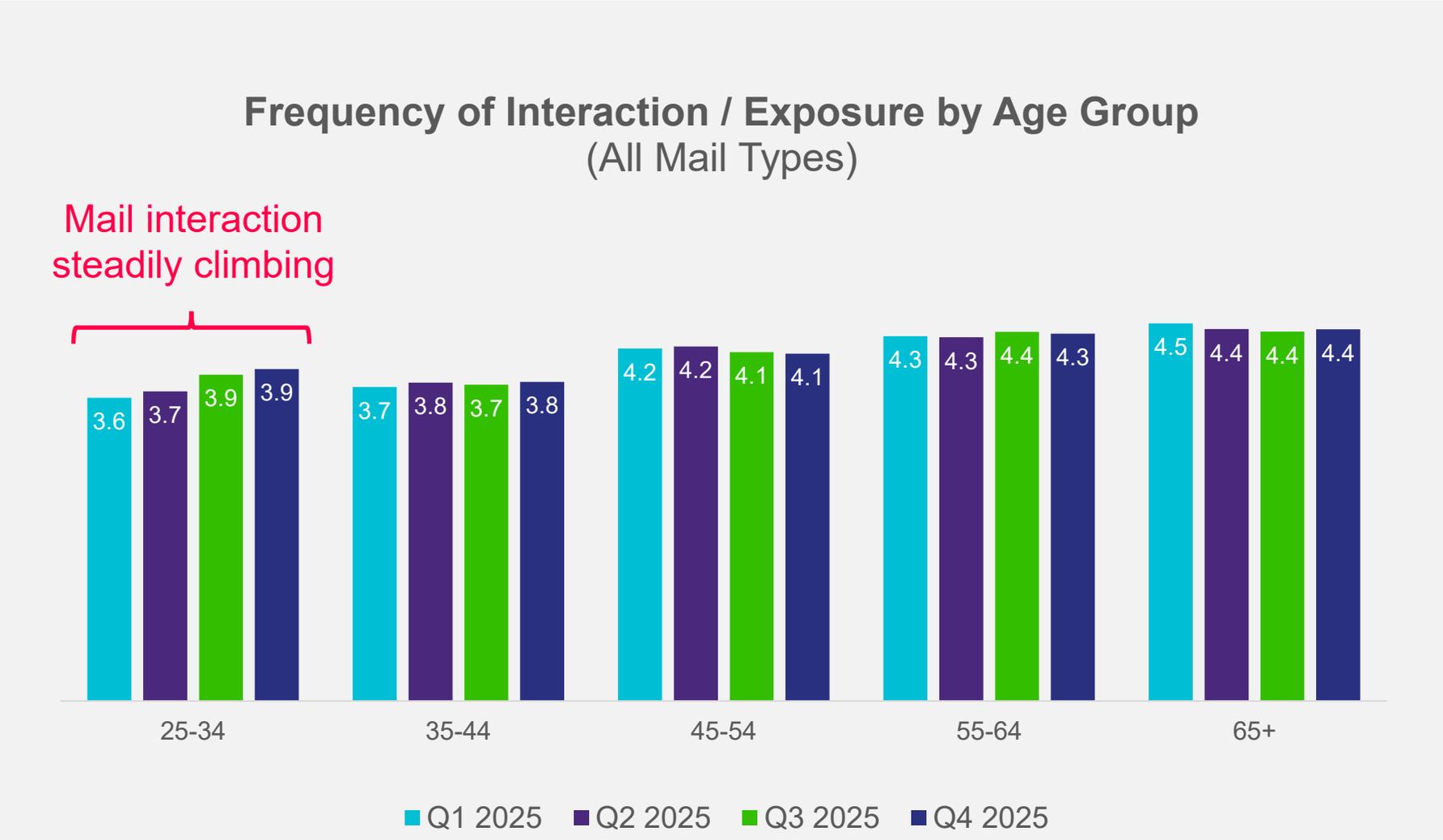
Mail Audiences Q4 2025

The New JICMAIL+TGI Connected Audiences Integration



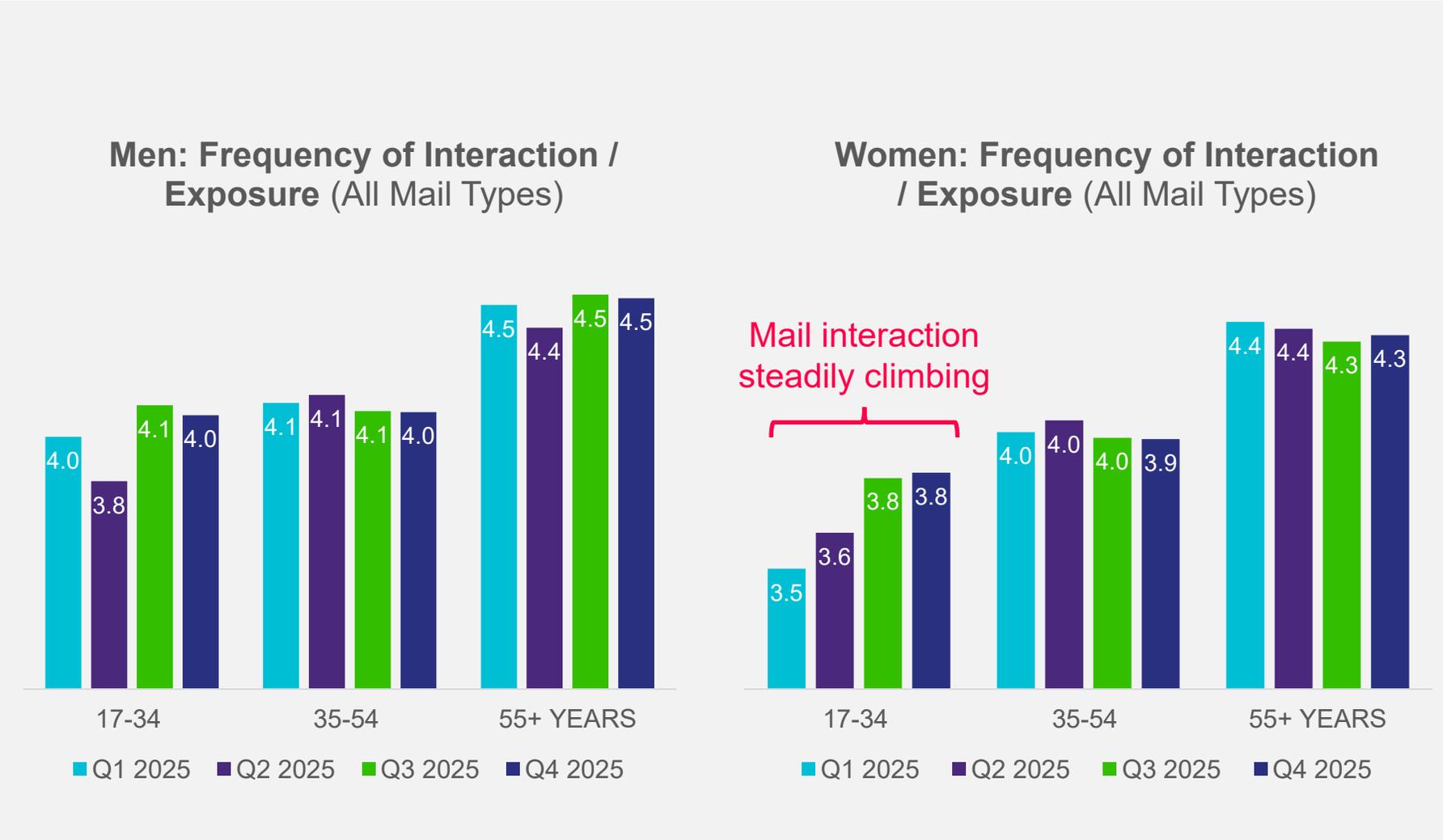
Mail Media Metrics

Mail engagement among younger audiences climbed steadily throughout 2025



Source: JICMAIL Item Data Q1 2025 to Q4 2025 n=29,383 mail items
Data displayed for Household Co-ordinator only

Younger women driving the increase, although men showing higher interaction rates overall



Source: JICMAIL Item Data Q1 2025 to Q4 2025 n=29,383 mail items
Data displayed for Household Co-ordinator only

JICMAIL has undertaken an integration with TGI to unlock hundreds of new planning audiences

TGI data is used to determine exactly who brands' audiences are, their psychographic behaviours and what makes them tick...



JICMAIL users now have access to TGI Connected Audiences: a sub-set of popular TGI audience variables

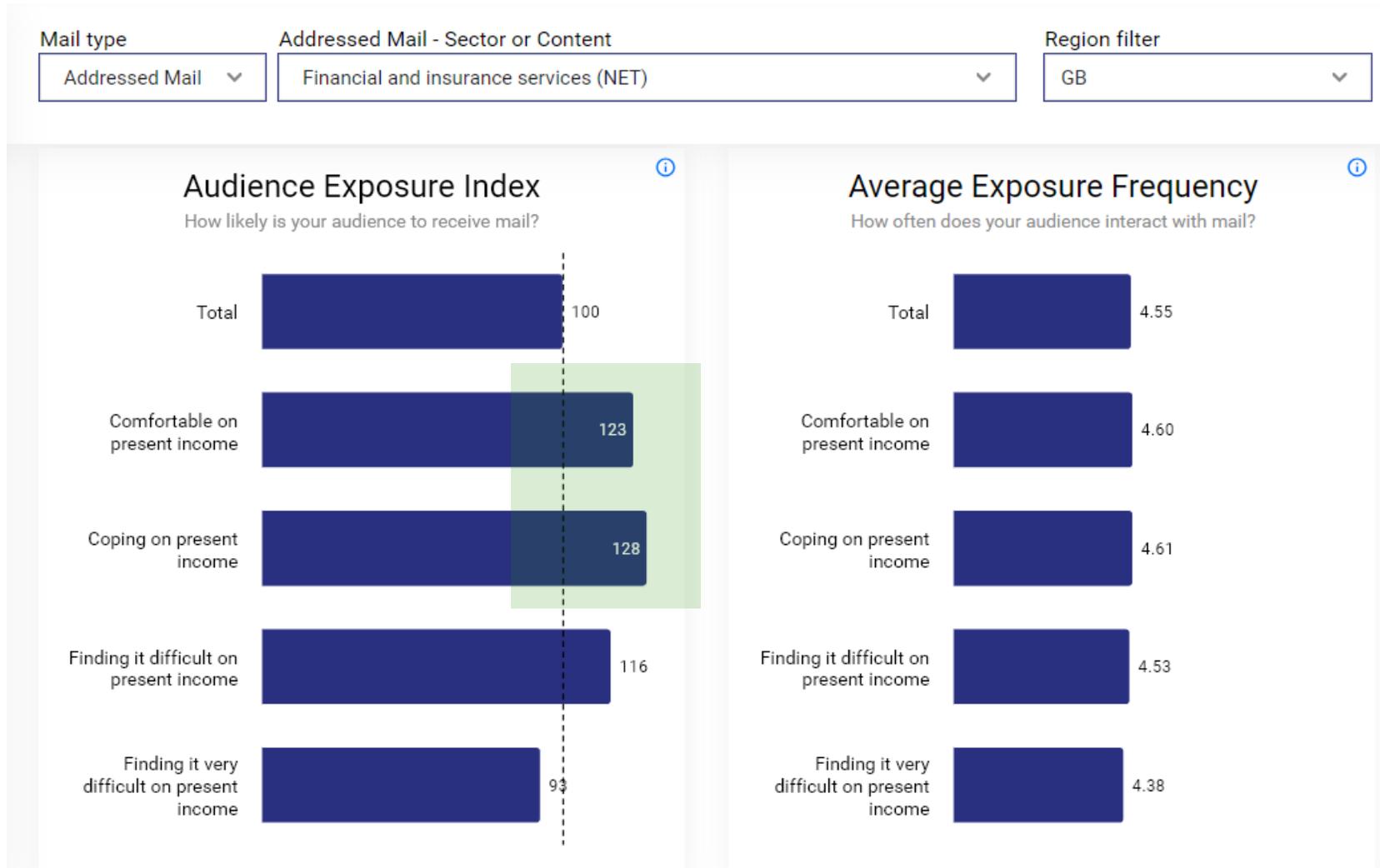
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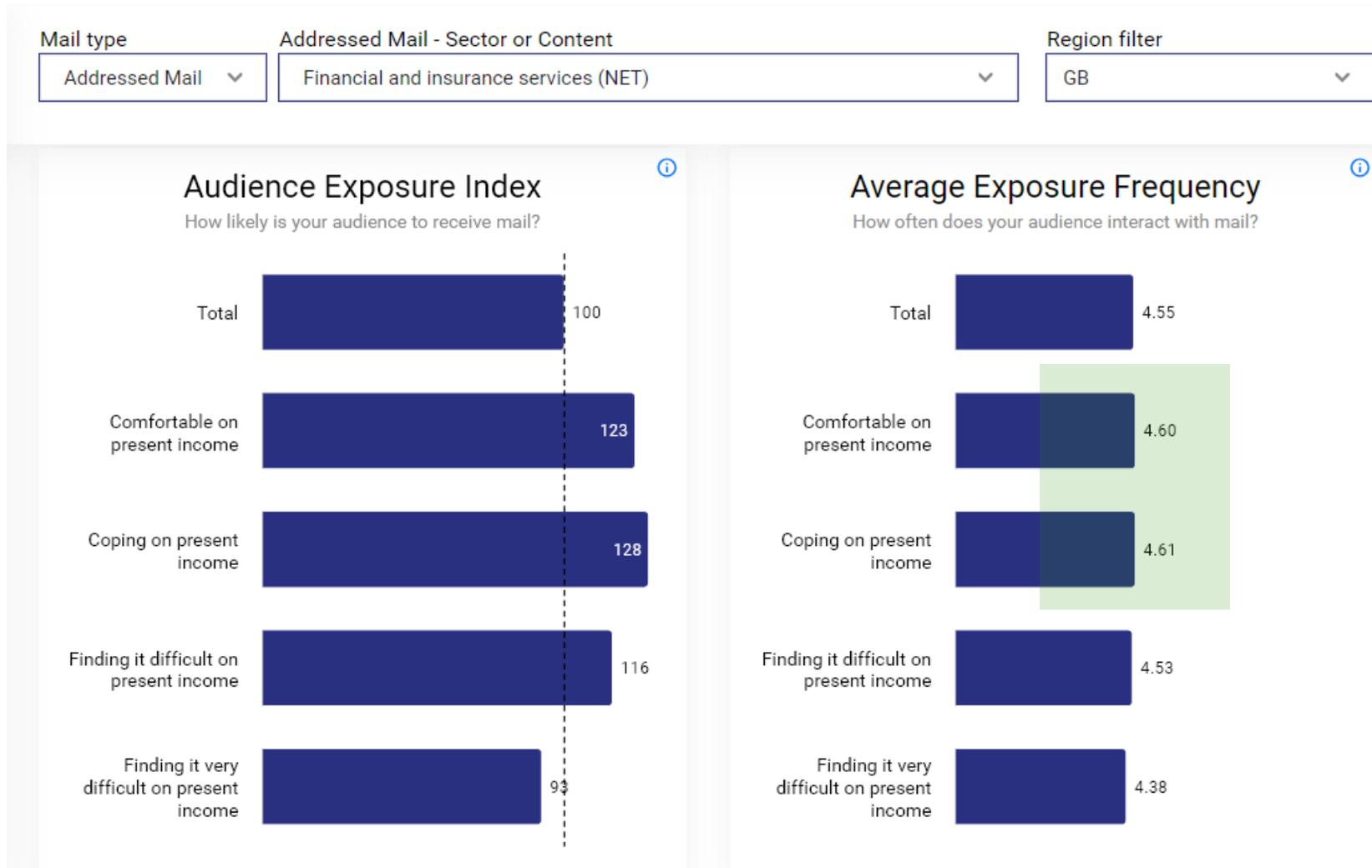
.....all from one tool

Affluent consumers are more likely to be targeted with Financial Services Direct Mail

Those who are comfortable on their present income are **23% more likely** than the average GB adult to receive **Financial Services Direct Mail**. Those who are coping are 28% more likely



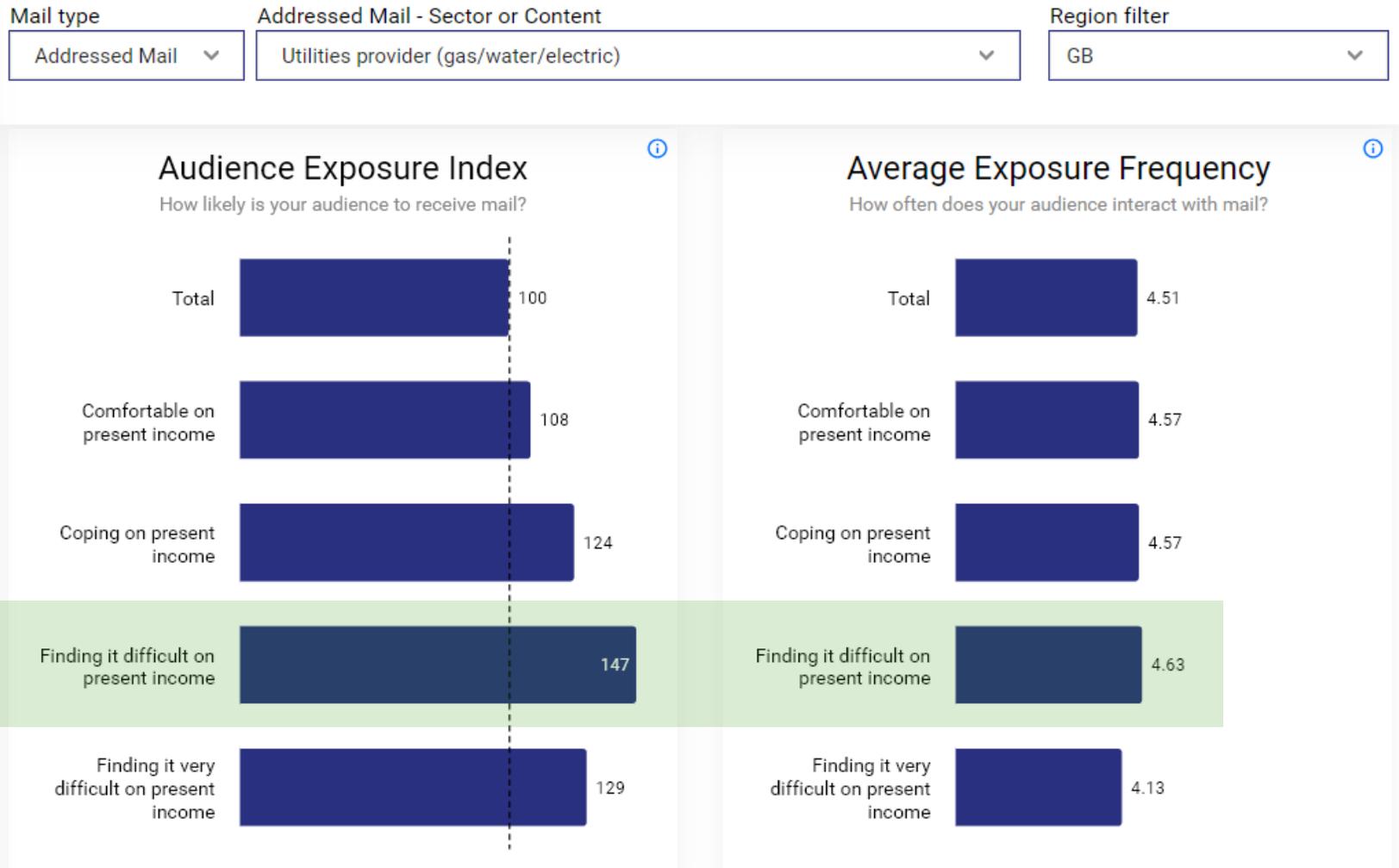
Affluent consumers also interact more with Financial Services Direct Mail



Those who are comfortable and coping on their present income also show the **highest frequency of interaction** with Financial Services Direct Mail across a 28-day period

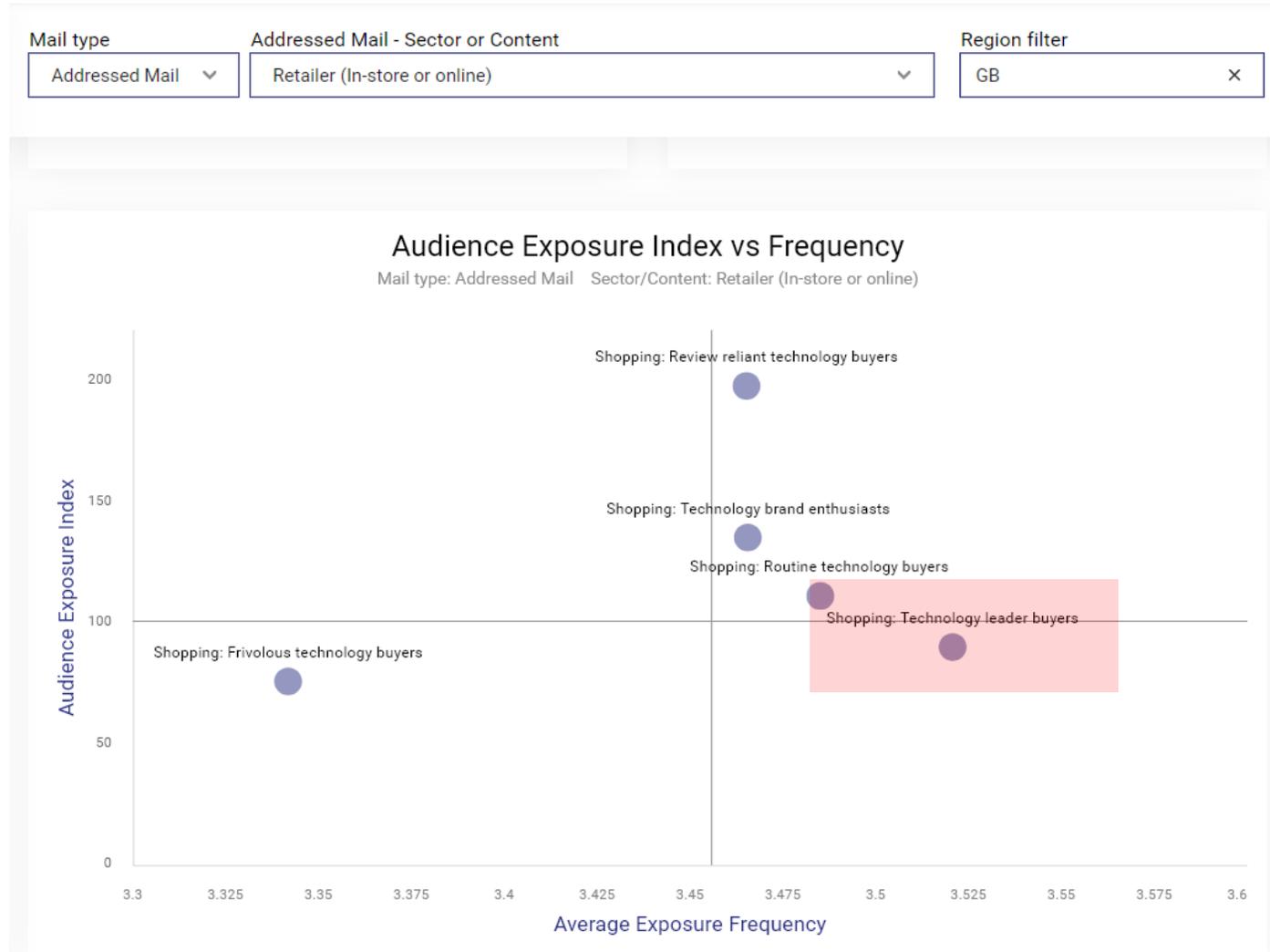
Less affluent consumers are engaging more with Utilities Direct Mail

Those finding it difficult on their present income are 47% more likely than average to be targeted with Utilities Direct Mail and interacting with 4.63 times a month on average.



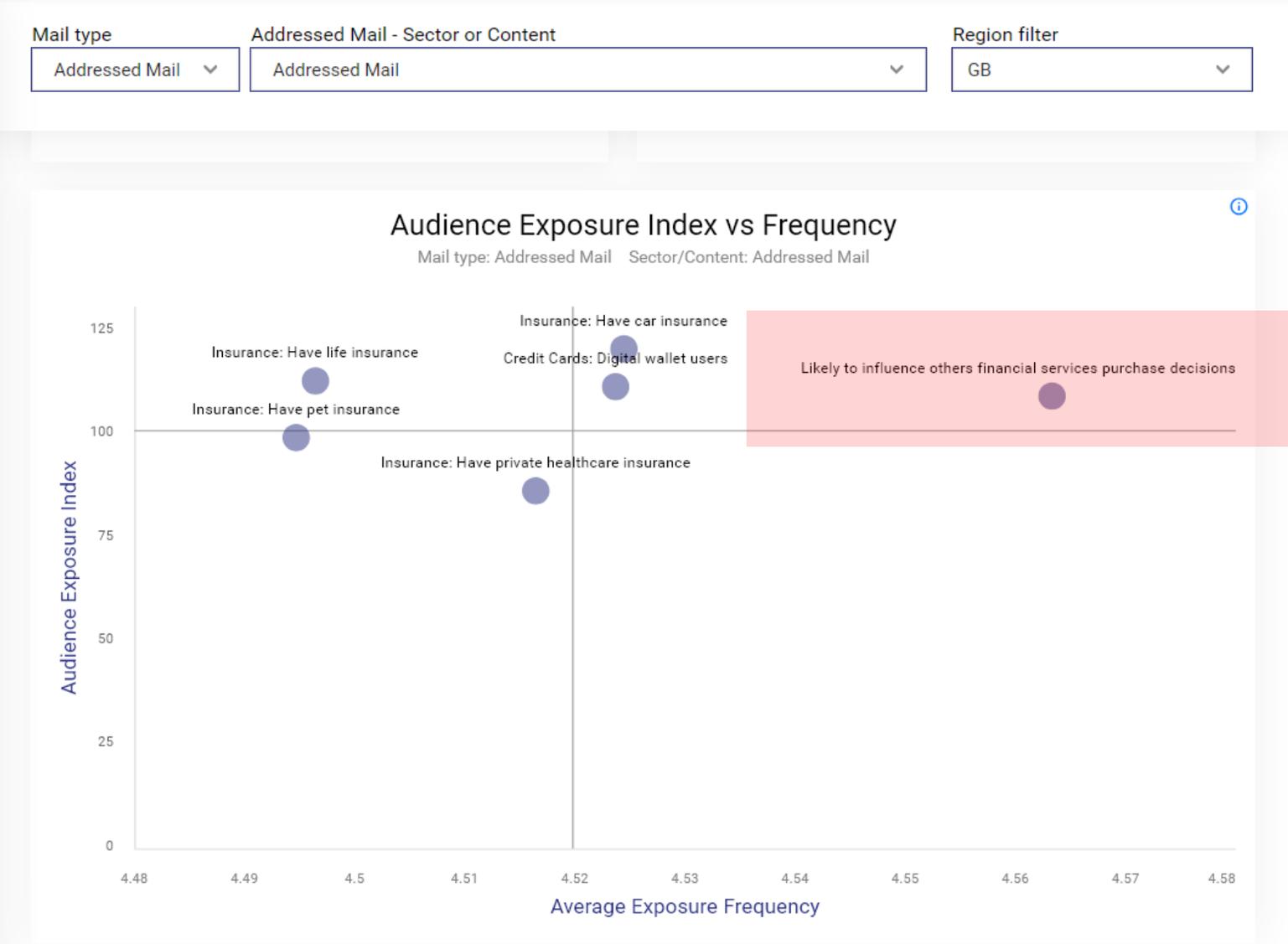
Technology Leader Buyers are an audience of untapped DM potential for Retail advertisers

Technology Leader Buyers are less likely than average to be targeted with Retail DM, but show **above average engagement** with the mail they do receive.



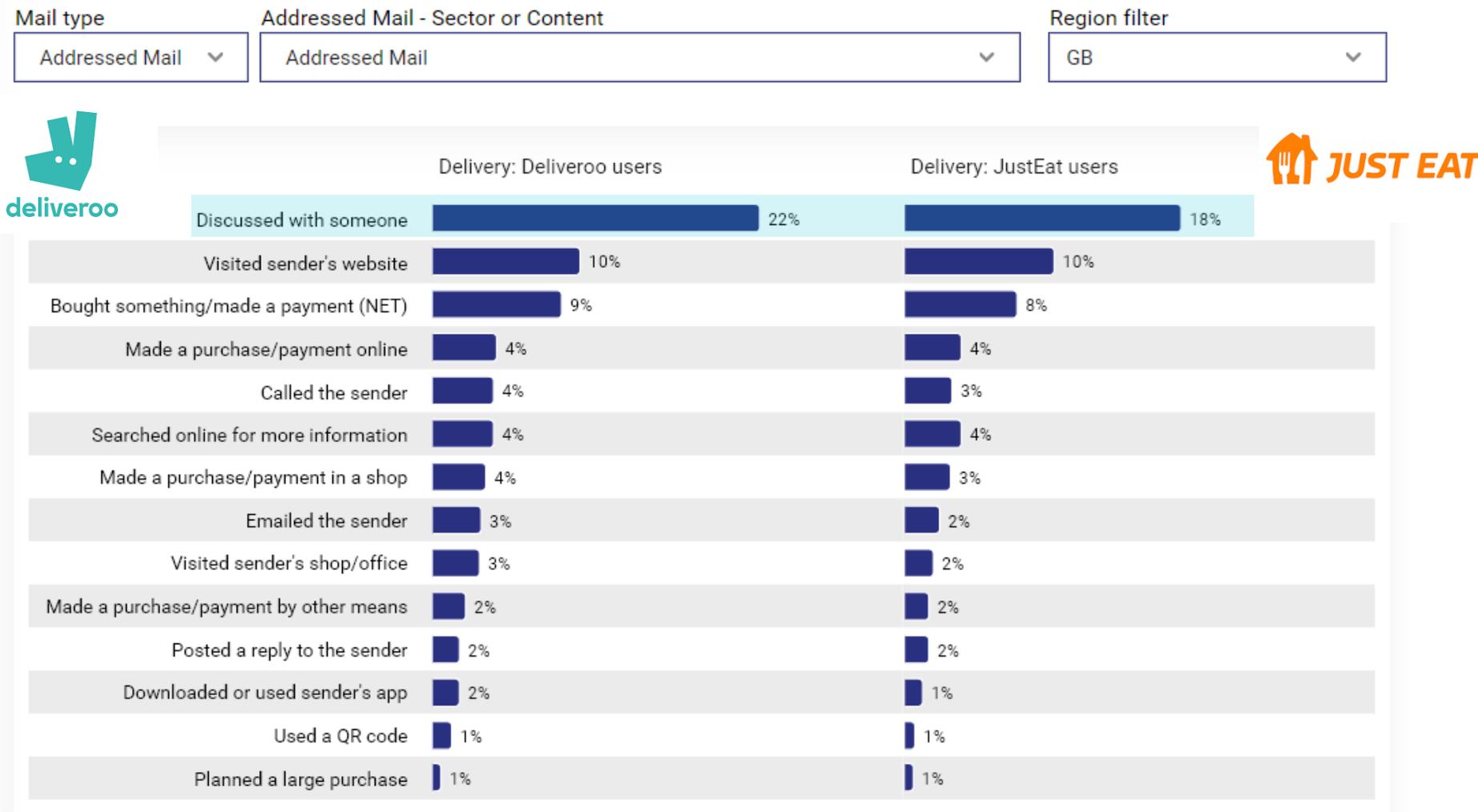
Technology Leader Buyers have a lot of **tech knowledge** and love to buy new technology. They are **able to influence others** about tech and tend to be younger

Finance Influencers are mail receptive audience



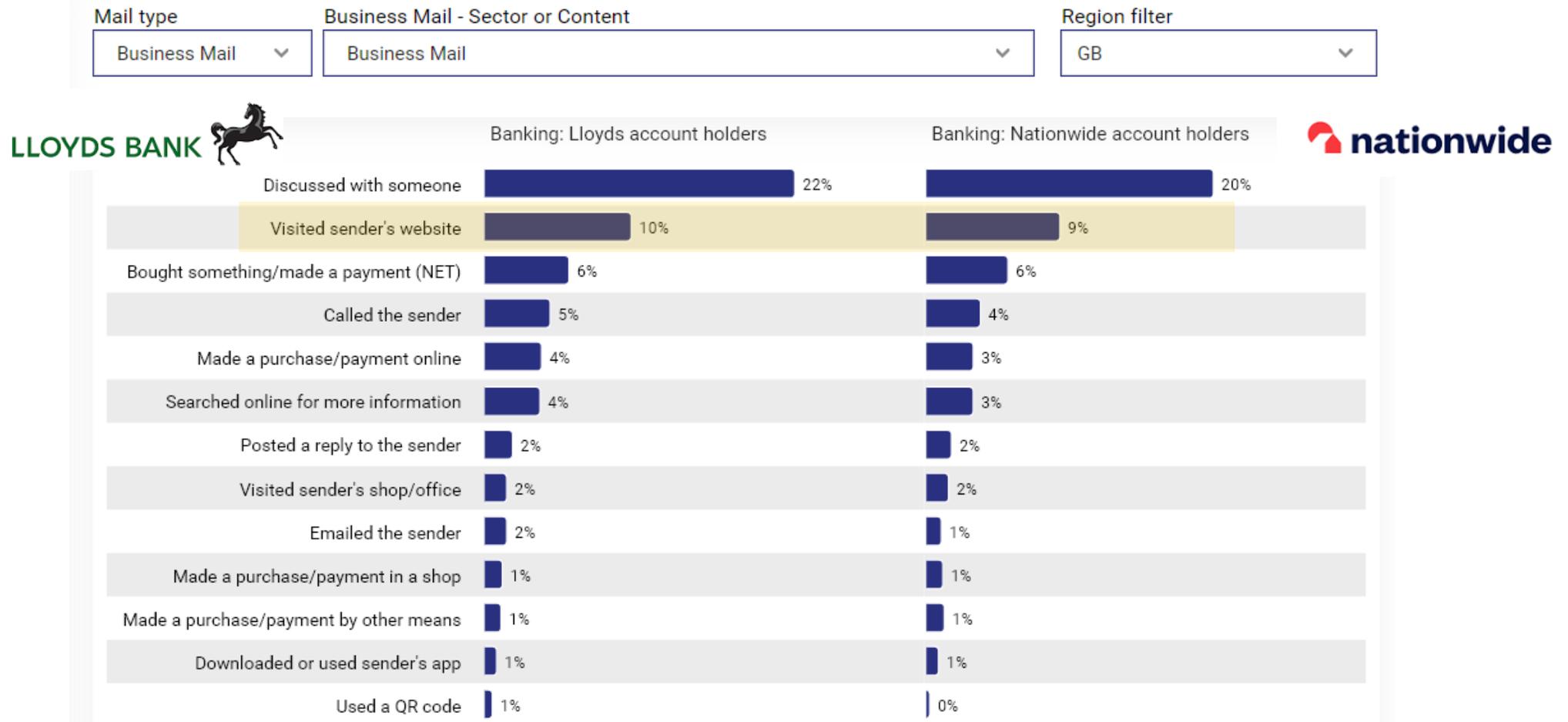
Compare mail commercial actions across household brands

Consumers who use **Deliveroo** are slightly more likely to **discuss** the contents of Direct Mail with other people than **JustEat** users

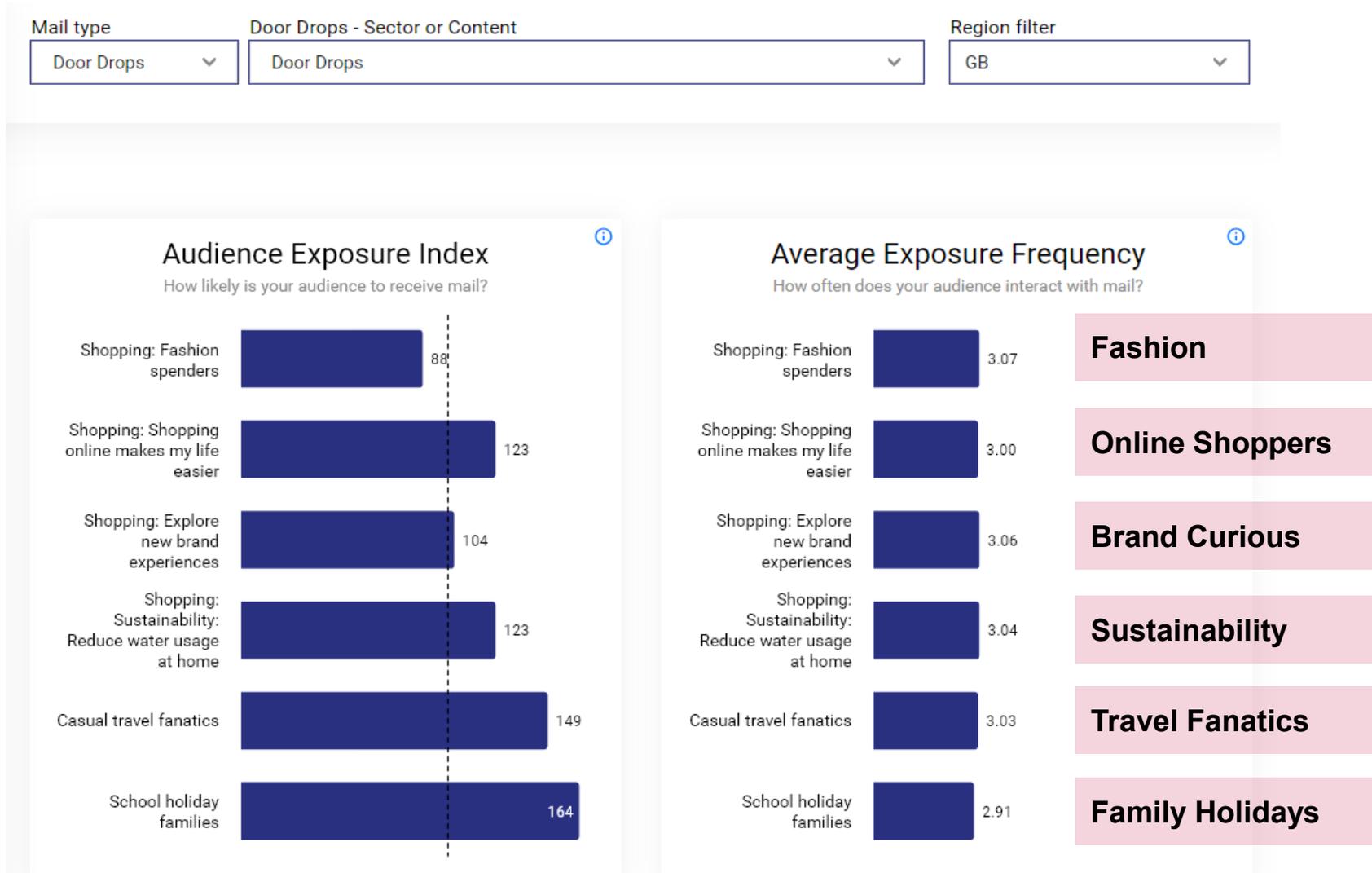


Business Mail exposure, frequency and commercial actions also available across TGI variables

Those who bank with **Lloyds** and **Nationwide** are almost as likely as each other to visit the sender's website after receiving Business Mail

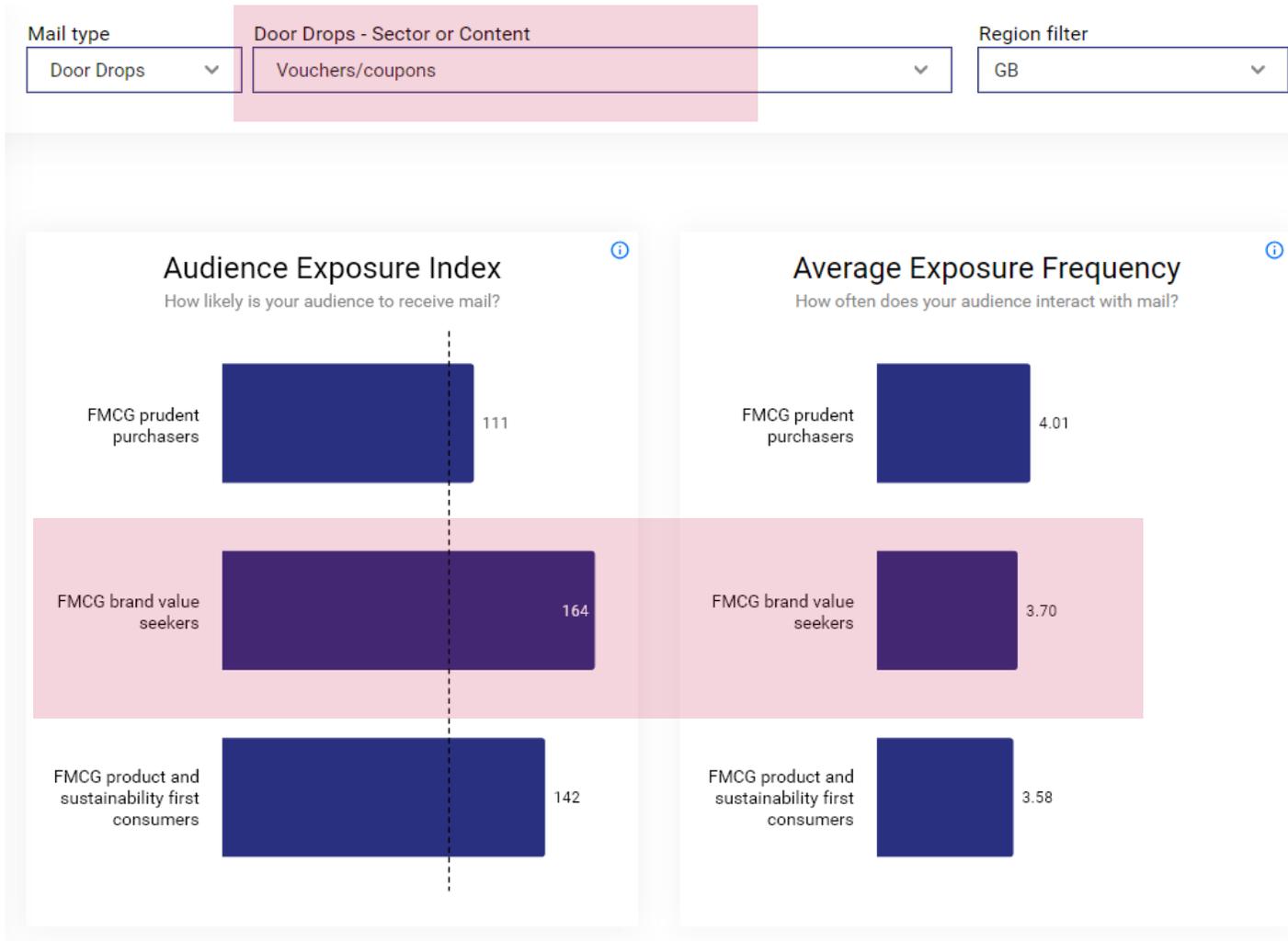


A wealth of acquisition audiences to target with Door Drops



Assess mail exposure and engagement by key content types

Those consumers primarily **motivated by value** rather than sustainability concerns, are more likely to engage with **vouchers and coupons**



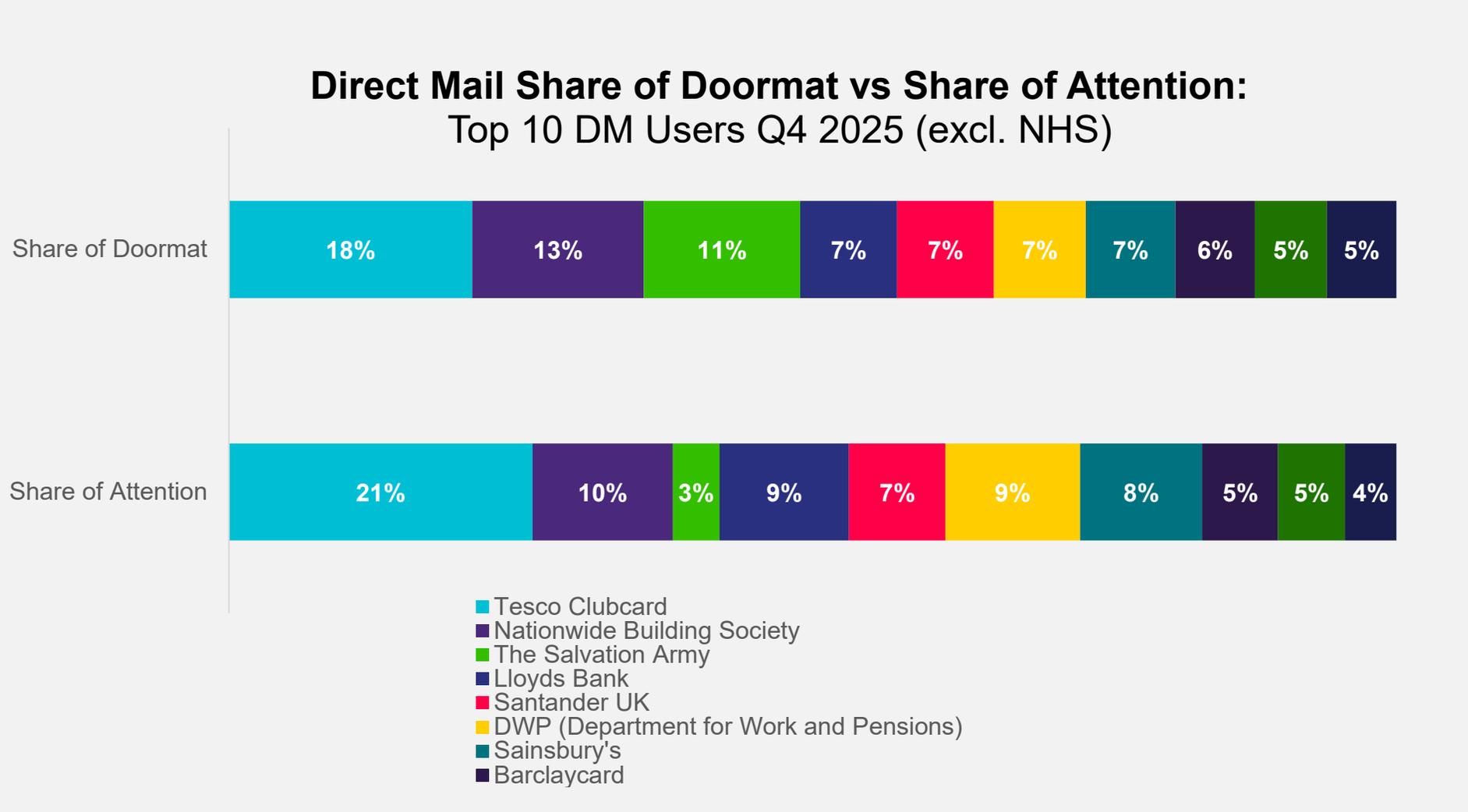
Advertiser Activity Q4 2025

Share of Doormat and Attention

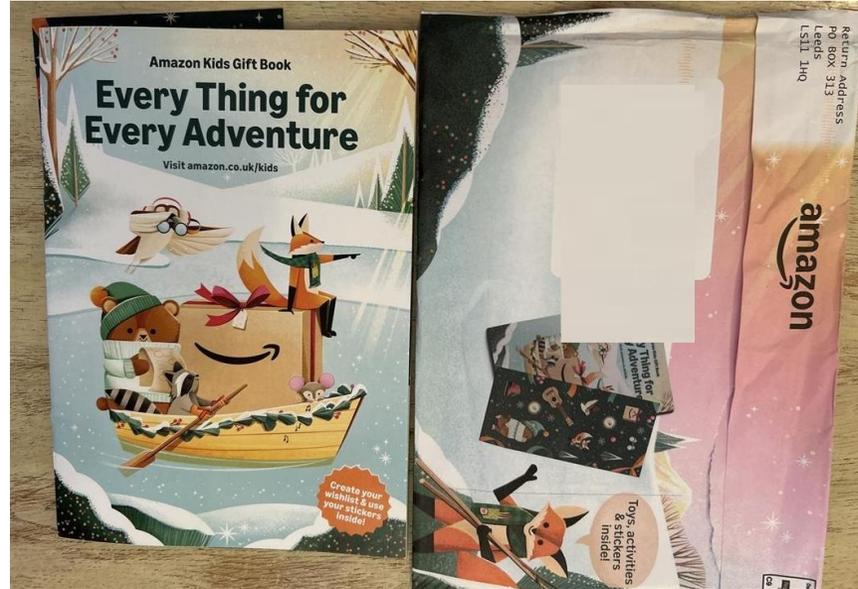


Mail Media Metrics

Tesco Clubcard continues to take a disproportionately high share of Direct Mail attention



Top performing DM creatives from Q4 2025

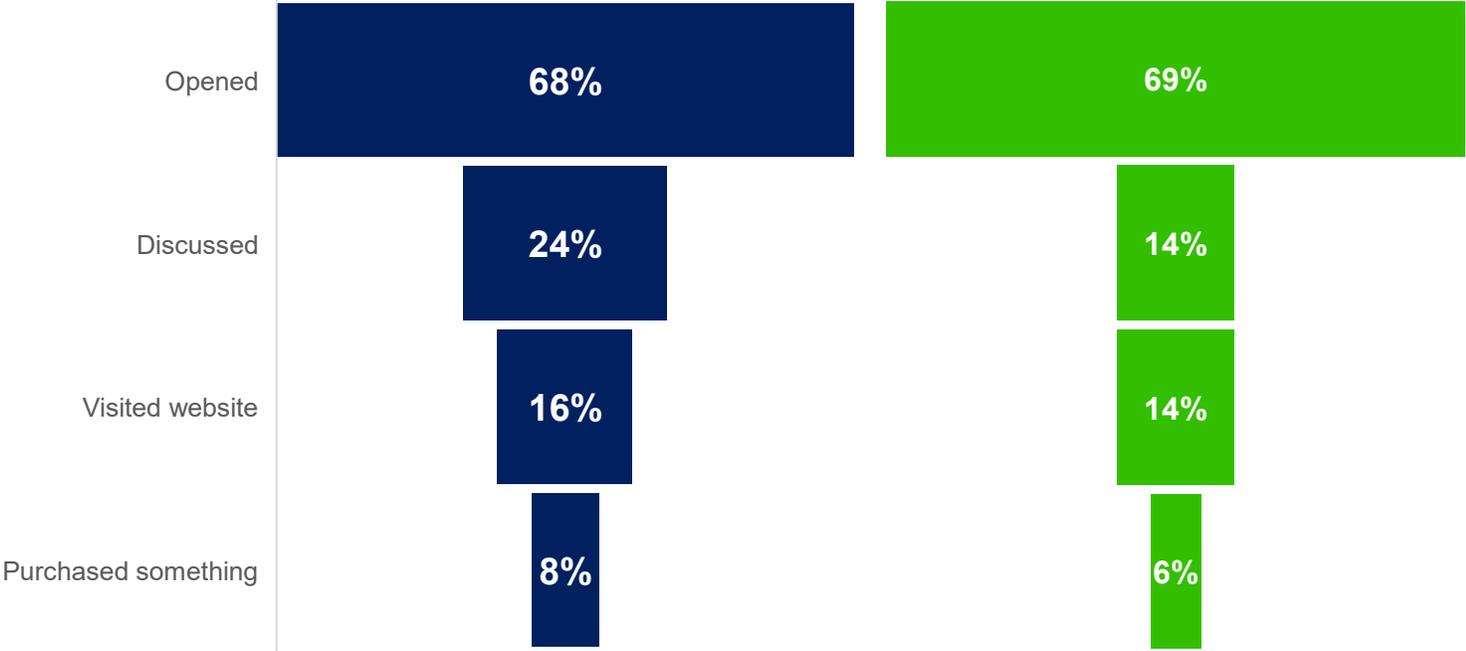


Indicative strong performance from Amazon's Christmas gift catalogue



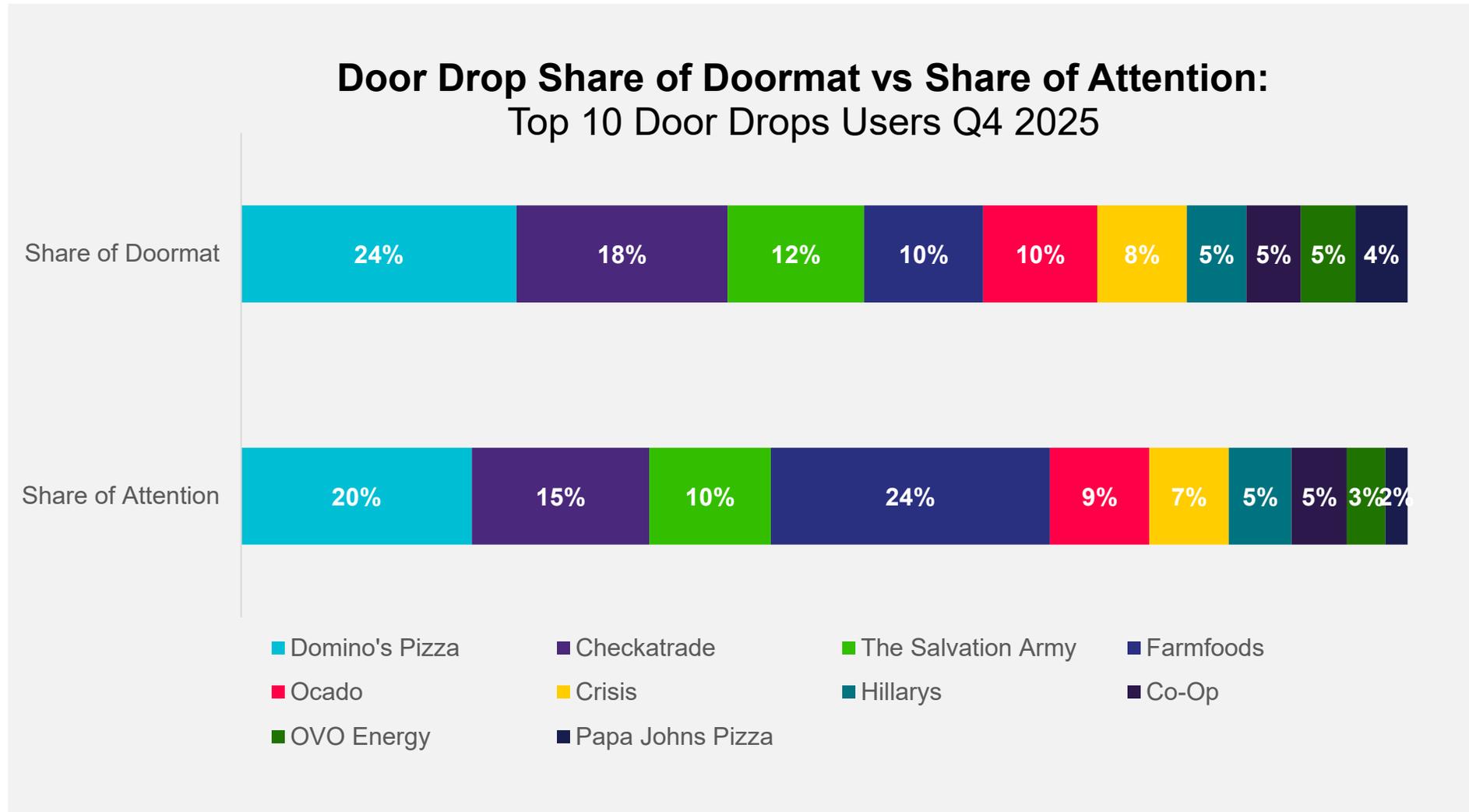
Amazon Catalogue Q4 2025

All Catalogues Q4 2025



n=25 items. Caution: Small Sample Size. Results are indicative only

Checktrade achieves over double the share of Door Drop attention versus share of doormat



Top performing Door Drop creative from Q4 2025

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Gas Boiler Installation	£1000 - £1500
Gas Boiler Repairs	£75 - £100
Gas Boiler Servicing/Flush	£75 - £100
Electrician	
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Electrical Faults	£100 - £1000
Electrician	
Landscaping	£100 - £750
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Window Repairs	£100 - £1000

Manchester (North East) and Uppermill

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Min. spend £60 | Max. reward £15
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- 4th shop 15% OFF** **VOUD9590B**
Min. spend £60 | Max. reward £10
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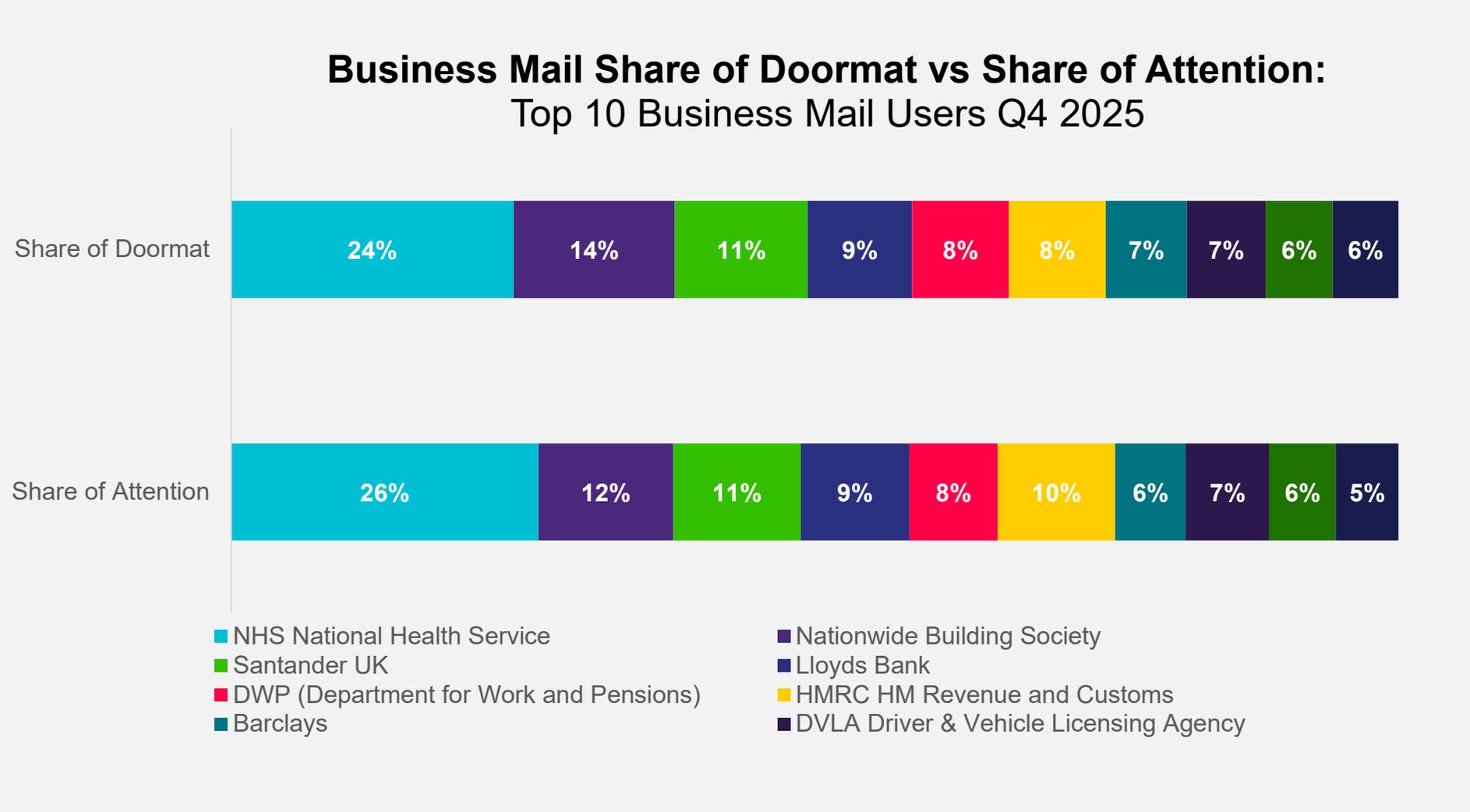
Excellent reviews
4.5 on Trustpilot

Over 170,000 repairs completed in 2024

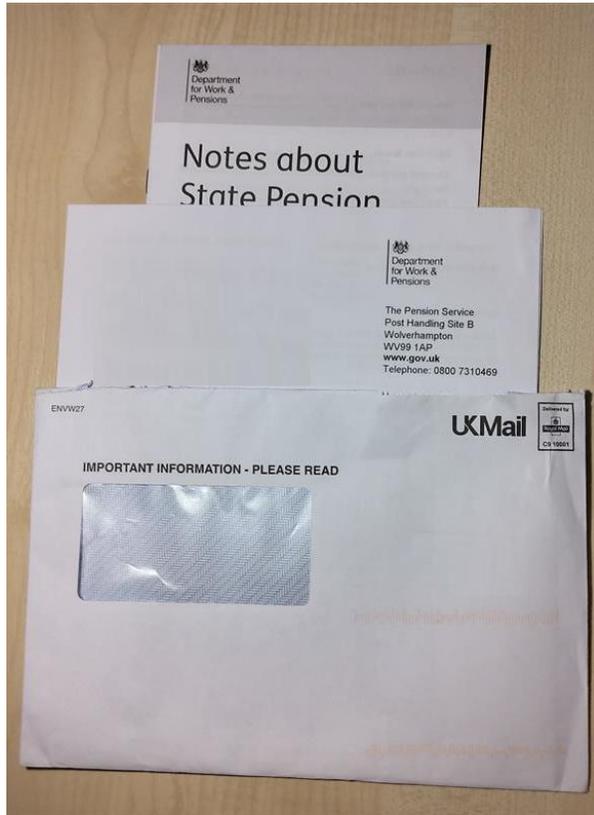
Over 165,000 homes rely on us

12 month contract. Offer not available on all products or for boiler cover customers who have had a plan in the last 30 days. Terms and eligibility criteria apply. Offer ends 11/12/2025.

NHS marginally over-performing for share of Business Mail attention



Top performing Business Mail creative from Q4 2025





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Thanks

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