

# JICMAIL Quarterly Results

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Q1 2026

The logo features the text 'JIC MAIL' in a bold, white, sans-serif font. The letters 'J' and 'I' are stacked vertically, as are 'M' and 'A'. The 'C' is positioned between the 'I' and the 'M'. The text is overlaid on a photograph of a wooden bowl containing various fruits, including bananas and apples, which is placed on a wooden tray. The entire scene is set against a solid blue background.

**JIC  
MAIL**

Mail Media Metrics



**JICMAIL Webinar**

# **Q1 2026: Unlocking Mail Geo Targeted Response**

**10.06.26 10.00AM**



# Mail's Super Touchpoint Strengths in Q1 2026

 **4.50**

Frequency of Direct Mail interaction. Read rates for All Mail up to 76%.

 **56%**

Of all mail-driven purchases are transacted online.

 **15%**

of mail triggers an in-home discussion

 **229 secs.**

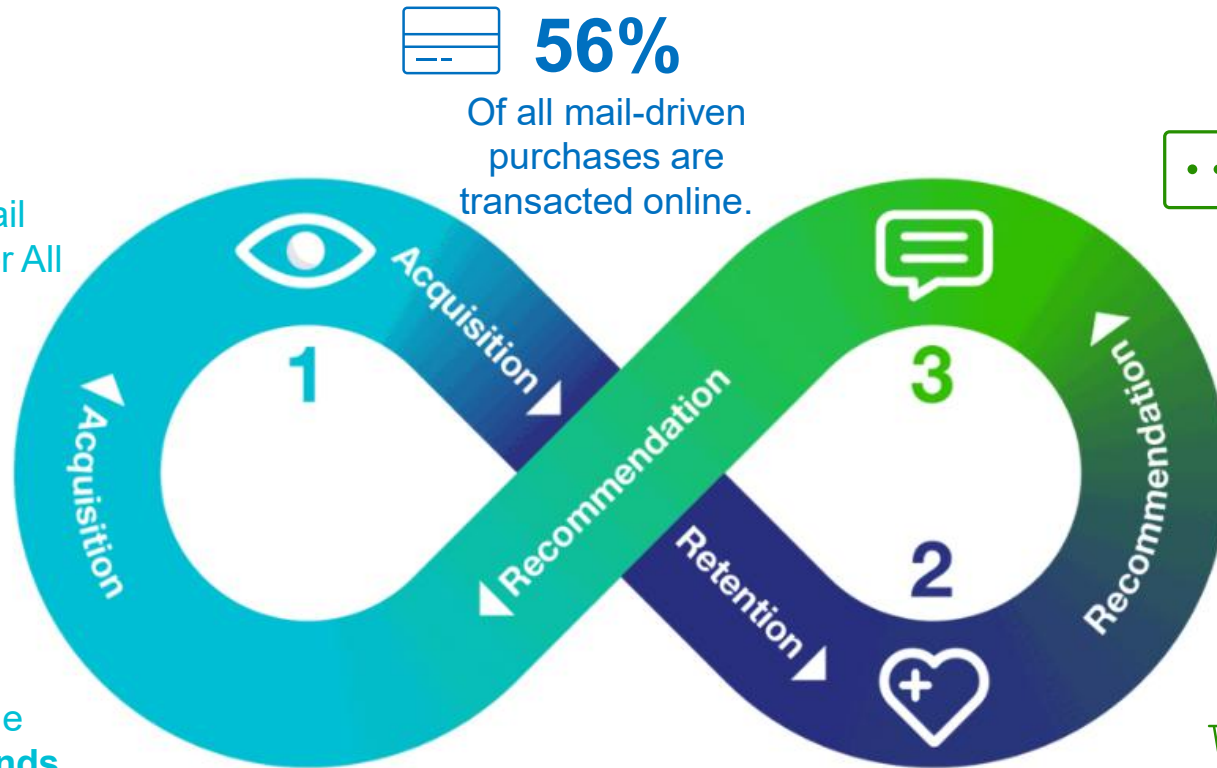
Spent with the average catalogue vs. **141 seconds** for DM and **57 seconds** for Door Drops

 **9.4%**

of mail prompts a website visit: a Q1 record

 **89%**

Of discarded mail is recycled: recycling rates are up year on year





## Engagement & Effectiveness

Mail continues to record high levels of digital effectiveness with website visits reaching a new Q1 record, and growth also noted in account look-ups, web searches and app downloads as a result of mail exposure. A record proportion of mail-driven transactions were fulfilled online in Q1.



## Response Rate Tracker

The Response Rate Tracker has now been updated to cover full year 2025 data. Response Rate, ROI, Average Order Value and Cost Per Acquisition benchmarks are available for Cold and Warm DM, Door Drop and for the first time Partially Addressed Mail. Warm and Cold Retail Direct Mail response has shown strong growth in 2025.



## Geo Planning

The recently released geo-planning tool from JICMAIL reveals a wealth of mail engagement data across 9,000 GB postcode sectors. Door Drop commercial effectiveness (the % of Door Drops driving any commercial outcome) is highest in London and other built-up areas, while Direct Mail Attention is found to be highest in Oxford, Reading and Cambridge postcode sectors.

Mail Engagement Q1 2026

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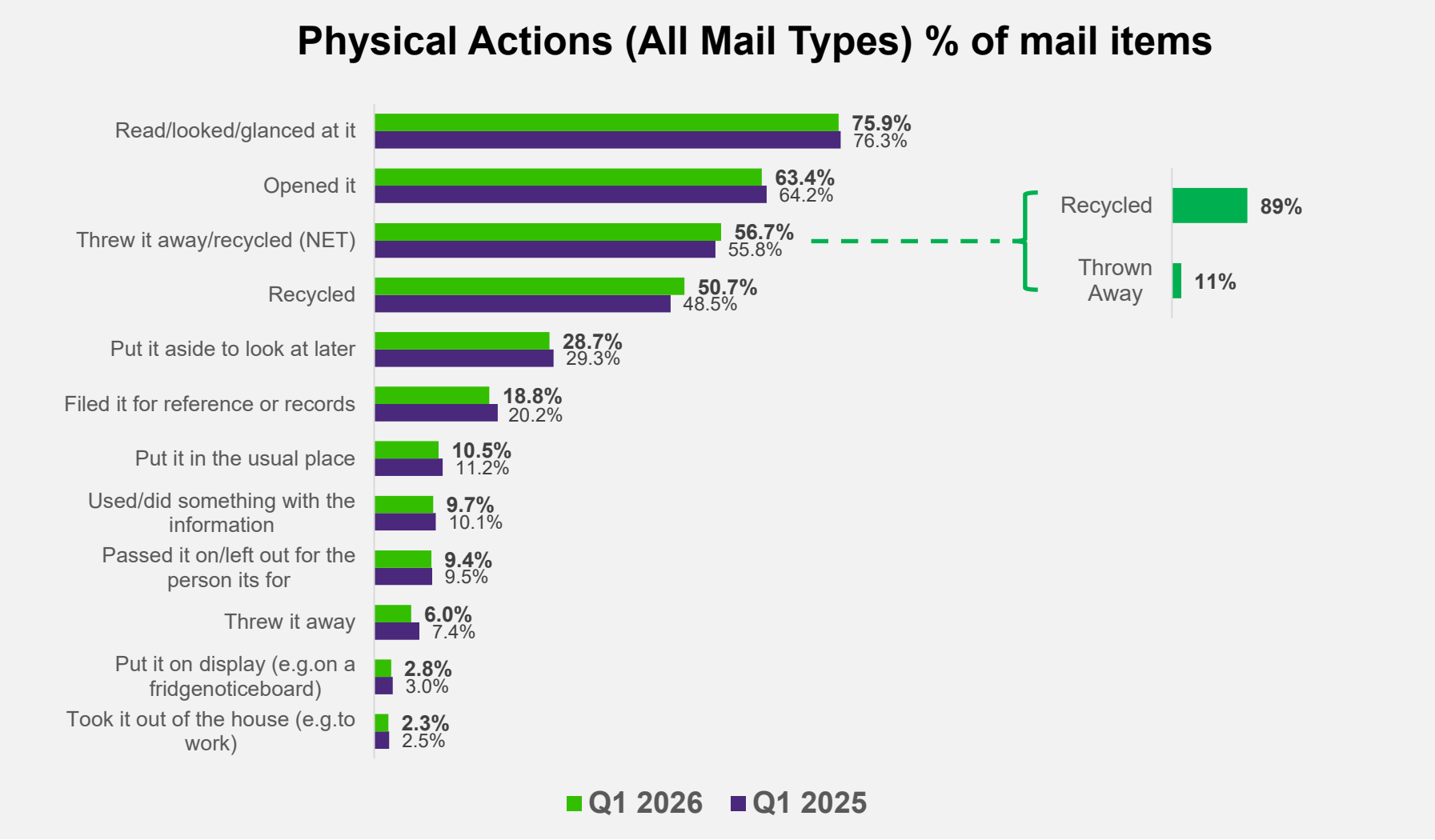
# Reach, Frequency, Lifespan and Attention



Mail Media Metrics

# Physical interaction with mail broadly stable year on year

In Q1 2026 mail recycling again grew: up to 51% of mail vs 49% a year prior.

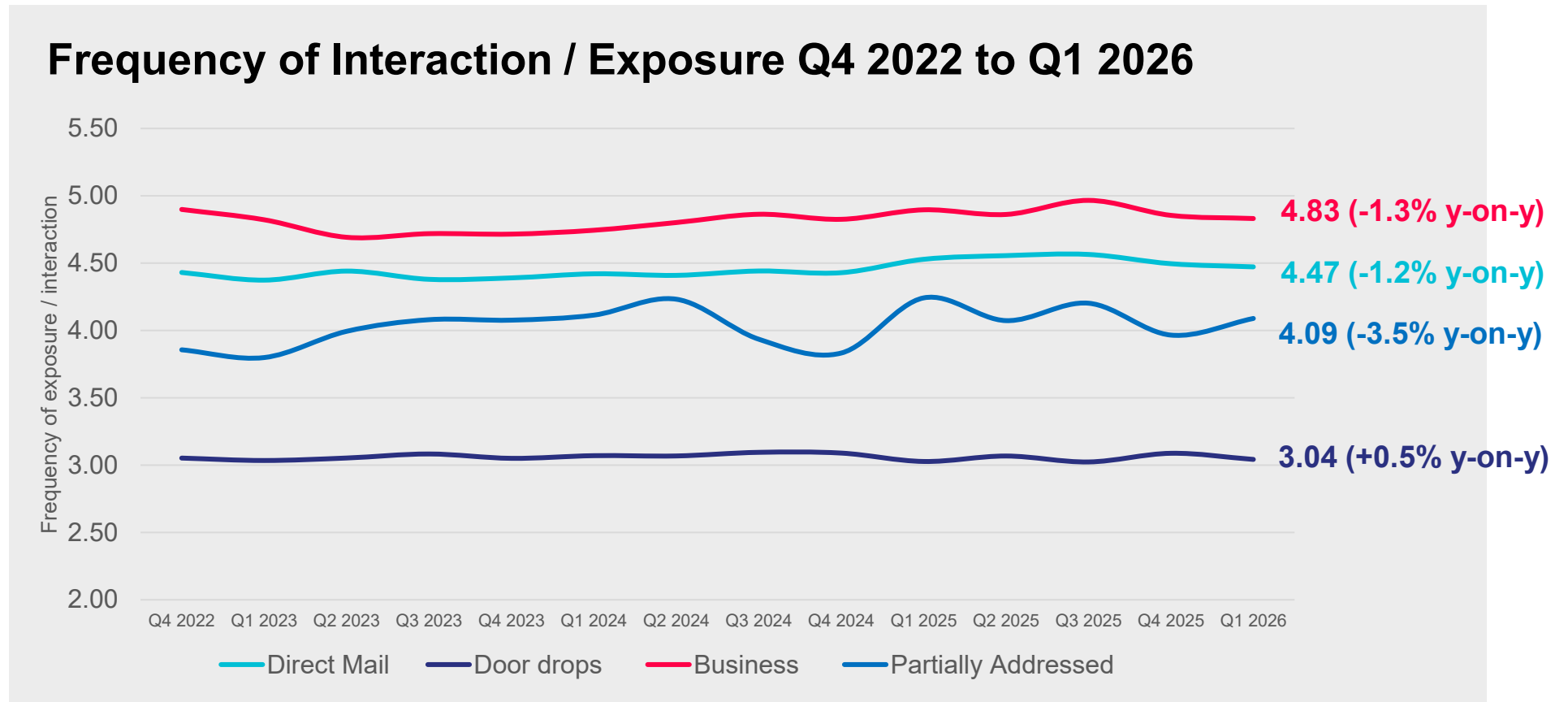


Source: JICMAIL Item Data Q1 2025 n=10,806 mail items; Q1 2026 n=10,109 mail items

# Frequency of engagement also stable year on year

Marginal declines were noted for Direct and Business Mail in Q1 2026, while Door Drop frequency grew 0.5%.

Frequency relates to the number of times a mail item is physically interacted with across a 28-day period. One interaction is assumed to equate to one exposure.

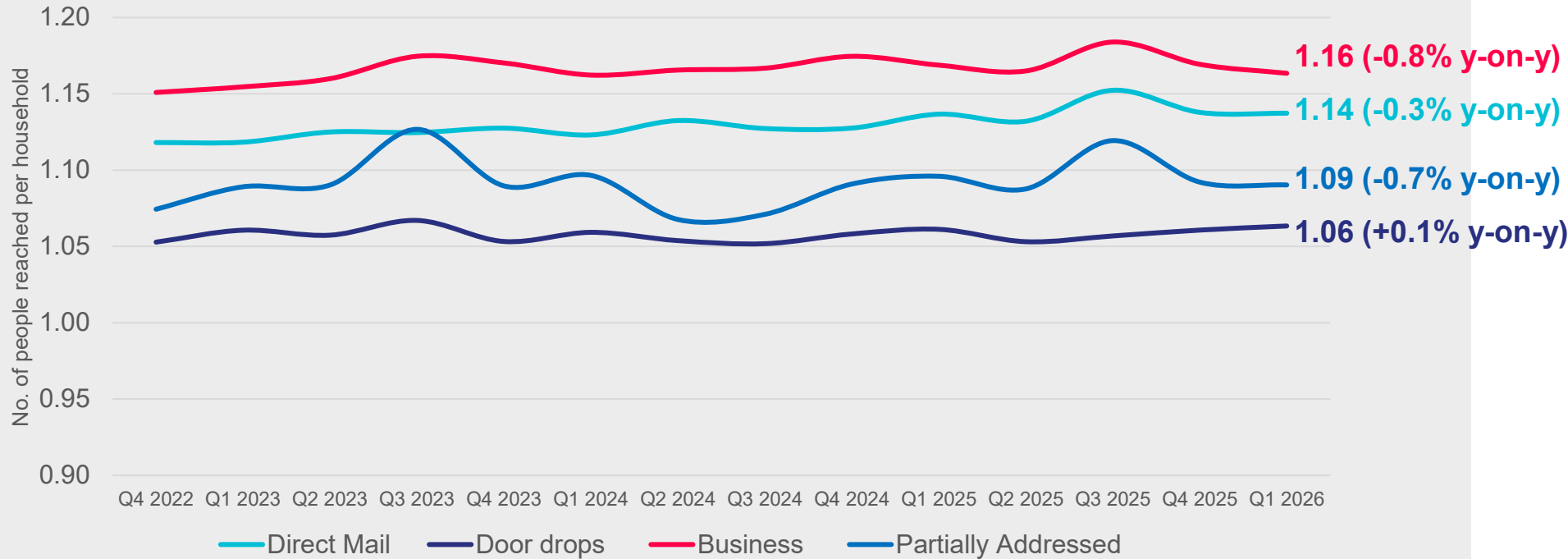


Source: JICMAIL Item Data Q4 2022 to Q1 2026 n=143,525 mail items

# The mail reach multiplier ranges from +6% to +16% depending on mail type

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 16 people, Direct Mail an additional 14 people, Partially Addressed an additional 9 people and Door Drops plus 6 people.

### Item Reach in the Household Q4 2022 to Q1 2026

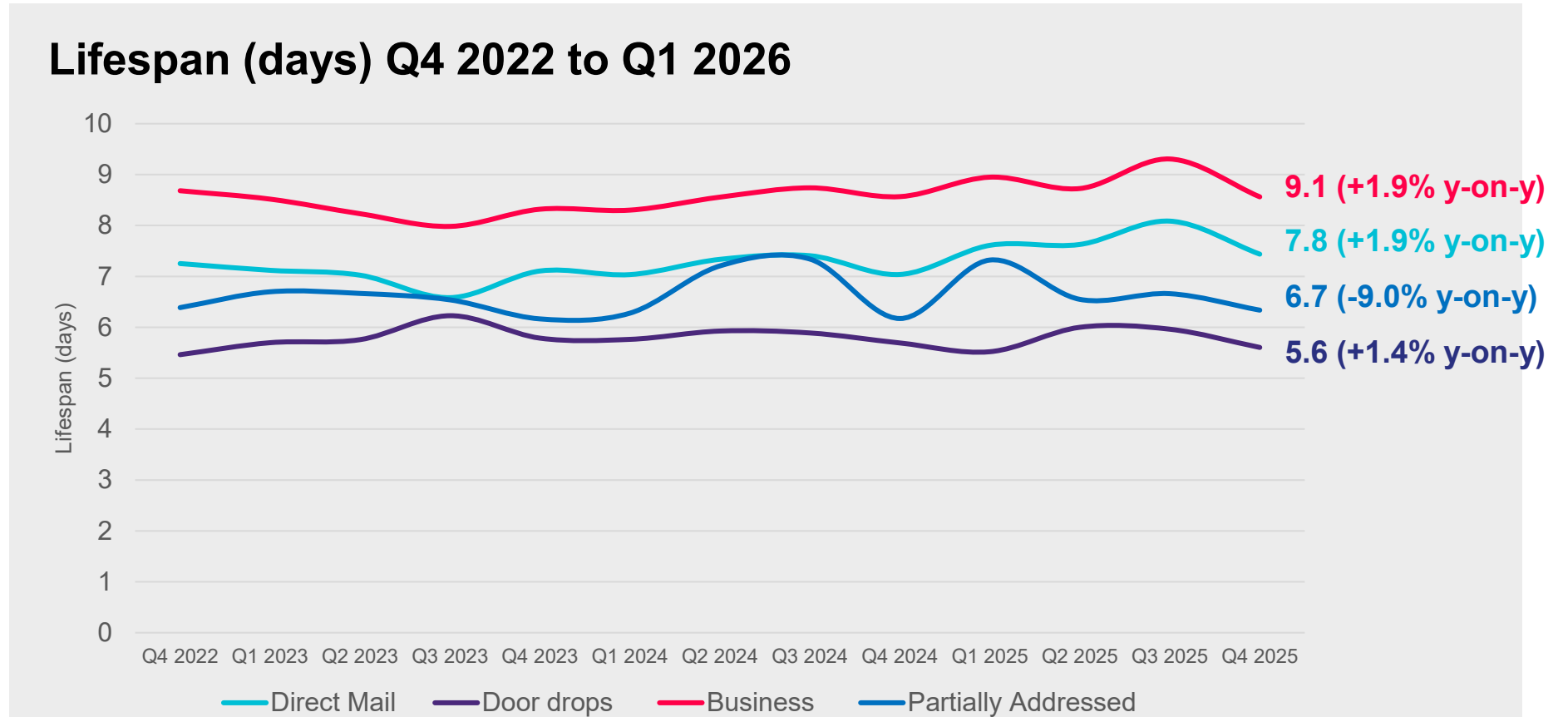


Source: JICMAIL Item Data Q4 2022 to Q1 2026 n=143,525 mail items

# Mail lifespan up across most mail types in Q1 2026

Direct Mail items are live in the home for 7.8 days before being discarded or filed away: a 1.9% higher lifespan than one year prior.

Door Drop lifespan is up to 5.6 days.

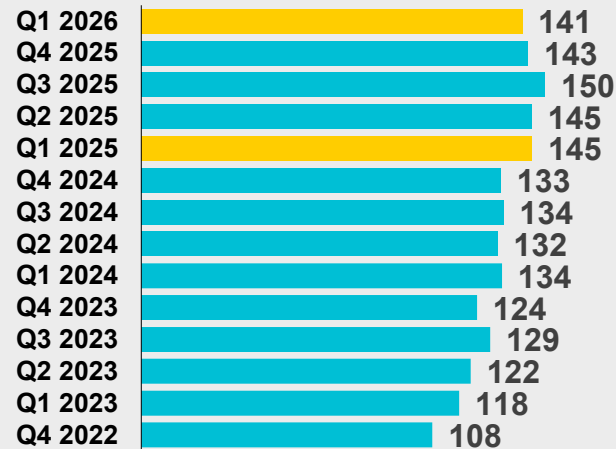


Source: JICMAIL Item Data Q4 2022 to Q1 2026 n=143,525 mail items

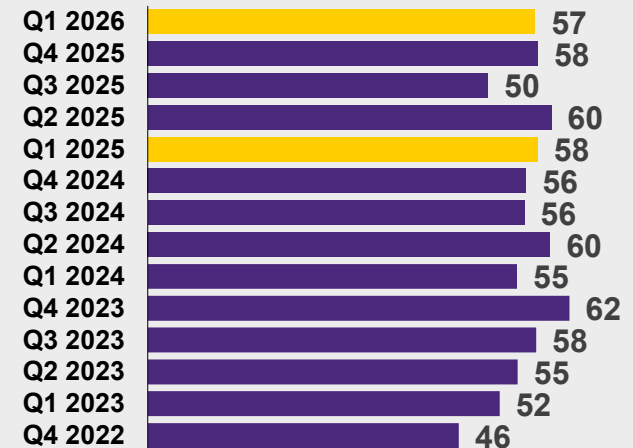
# Direct Mail attention holds at over 140 seconds; Door Drops are looked at for just under a minute

The average Direct Mail item was interacted with for 141 seconds by anyone in the household across a 28-day period in Q1 2026, and the average Door Drop for 57 seconds

## Direct Mail Attention (seconds interacted with per item)



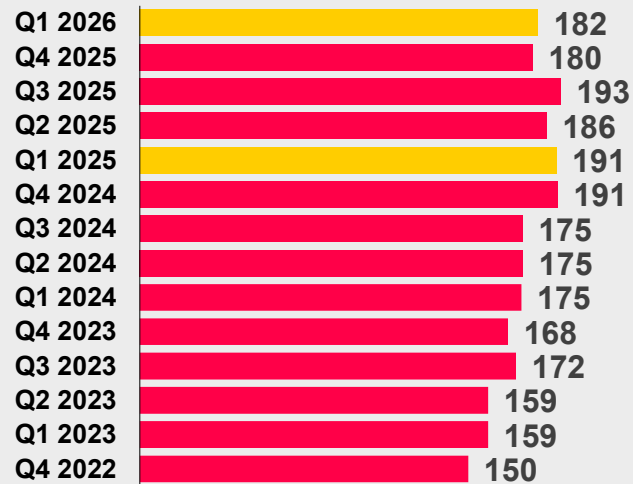
## Door Drop Attention (seconds interacted with per item)



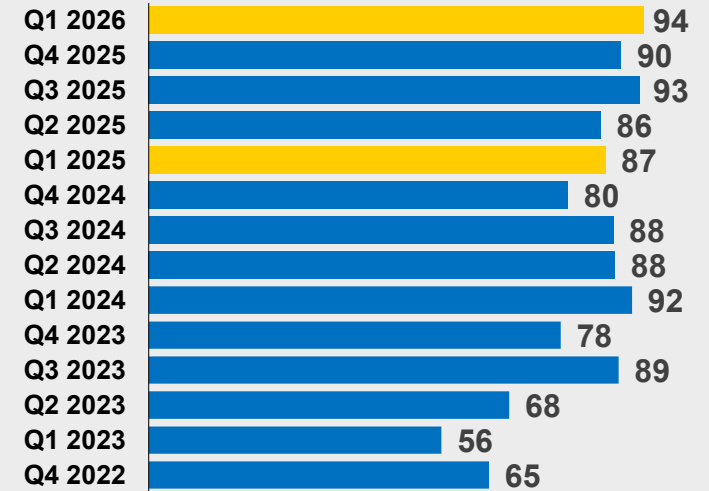
# Partially Addressed attention up by seven seconds

The average Business Mail item was interacted with for 182 seconds by anyone in the household across a 28-day period in Q1 2026.

## Business Mail Attention (seconds interacted with per item)

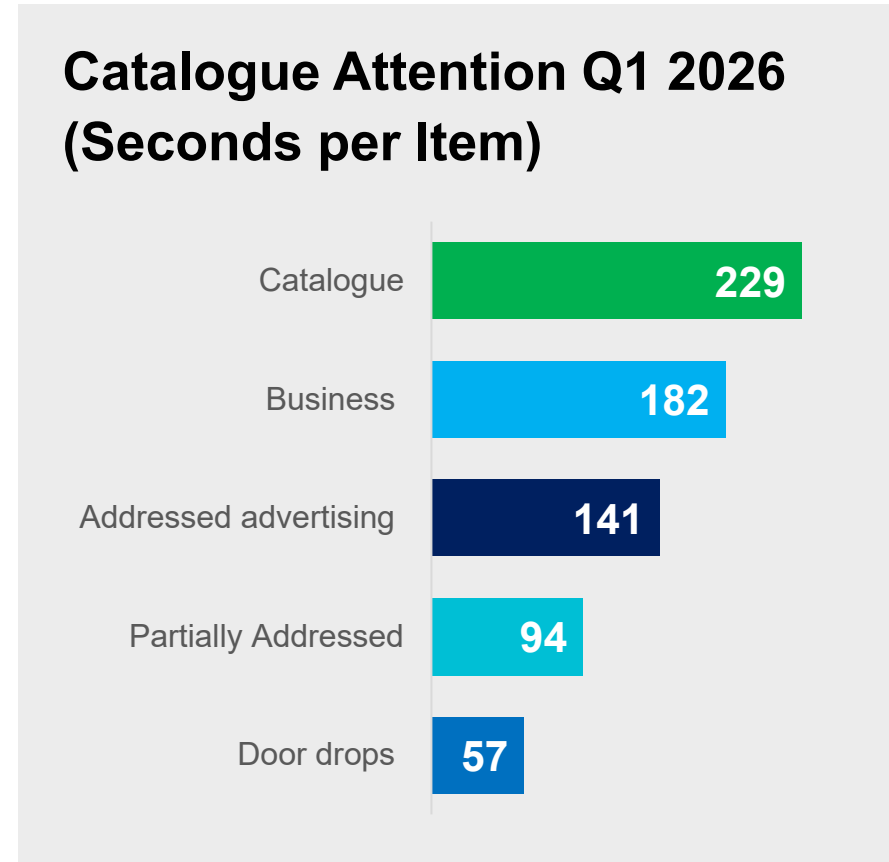
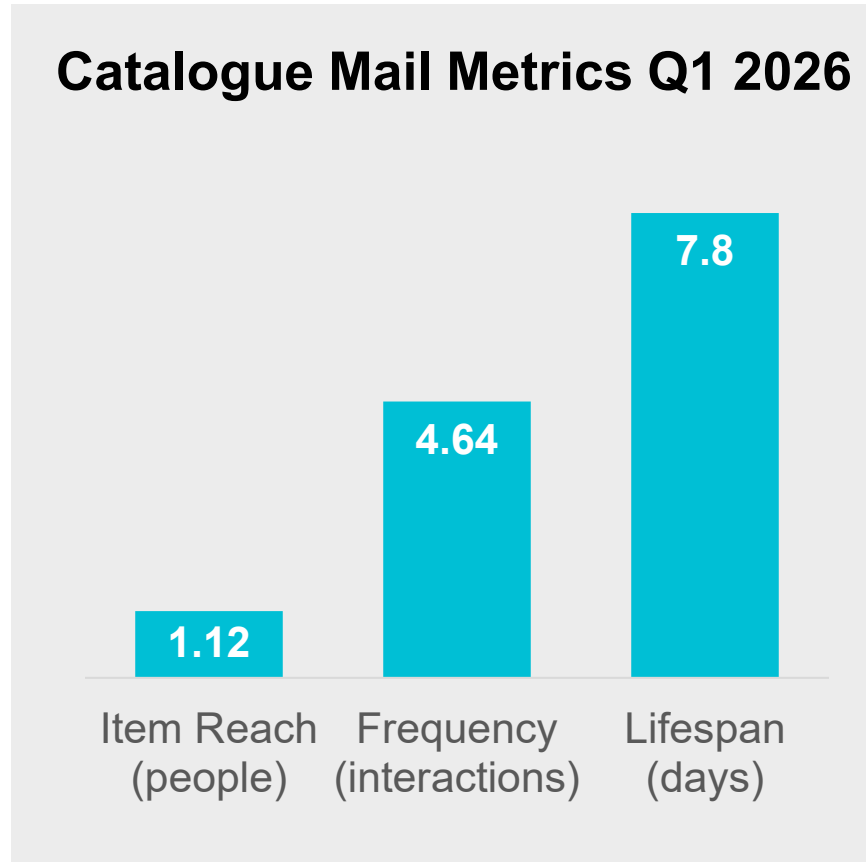


## Partially Addressed Mail Attention (seconds interacted with per item)



# Catalogues are looked at for nearly four minutes on average

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 nearly 230 seconds a month on average.



Mail Effectiveness Q1 2026

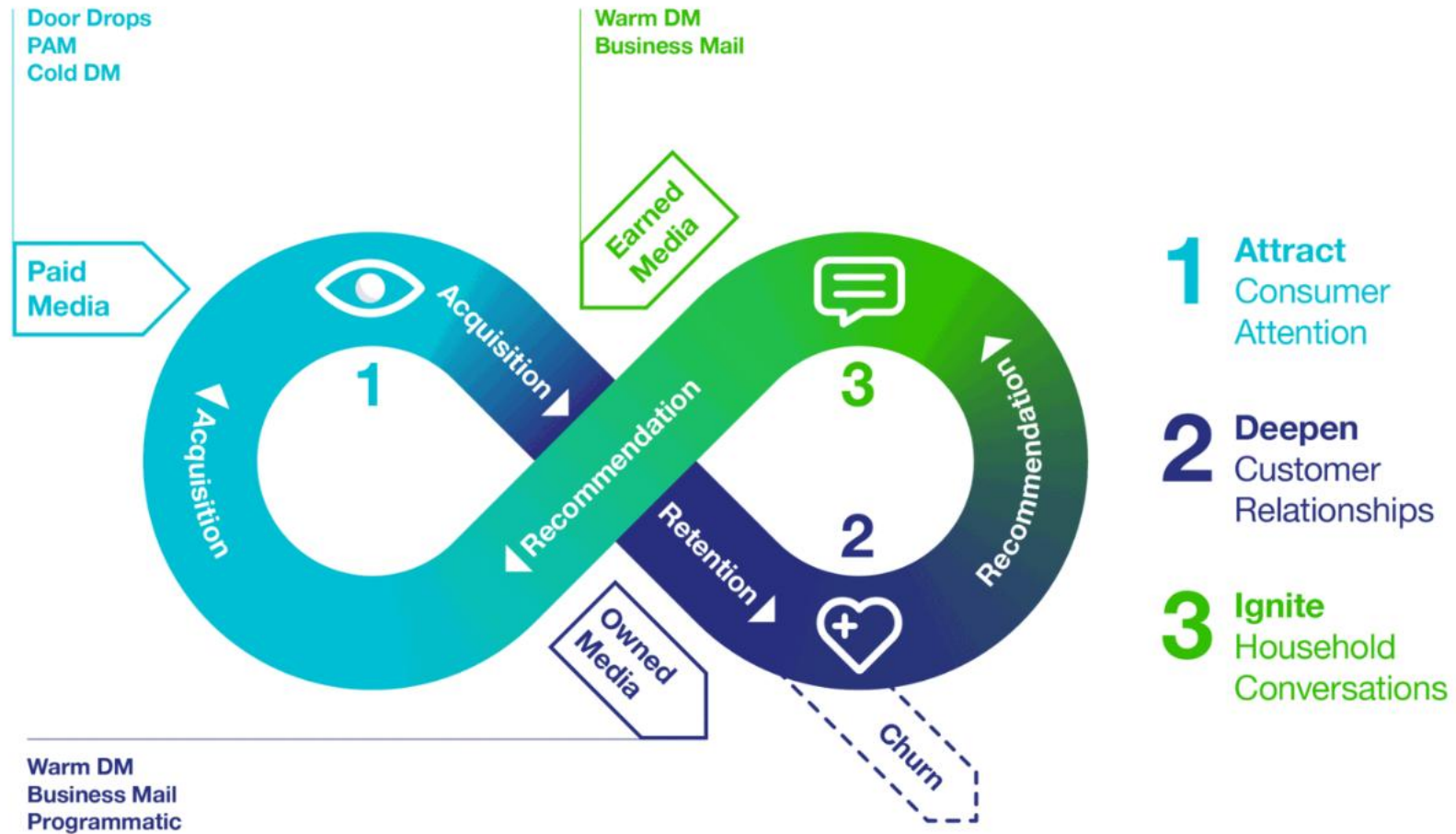
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# Mail's Super Touchpoint Strengths



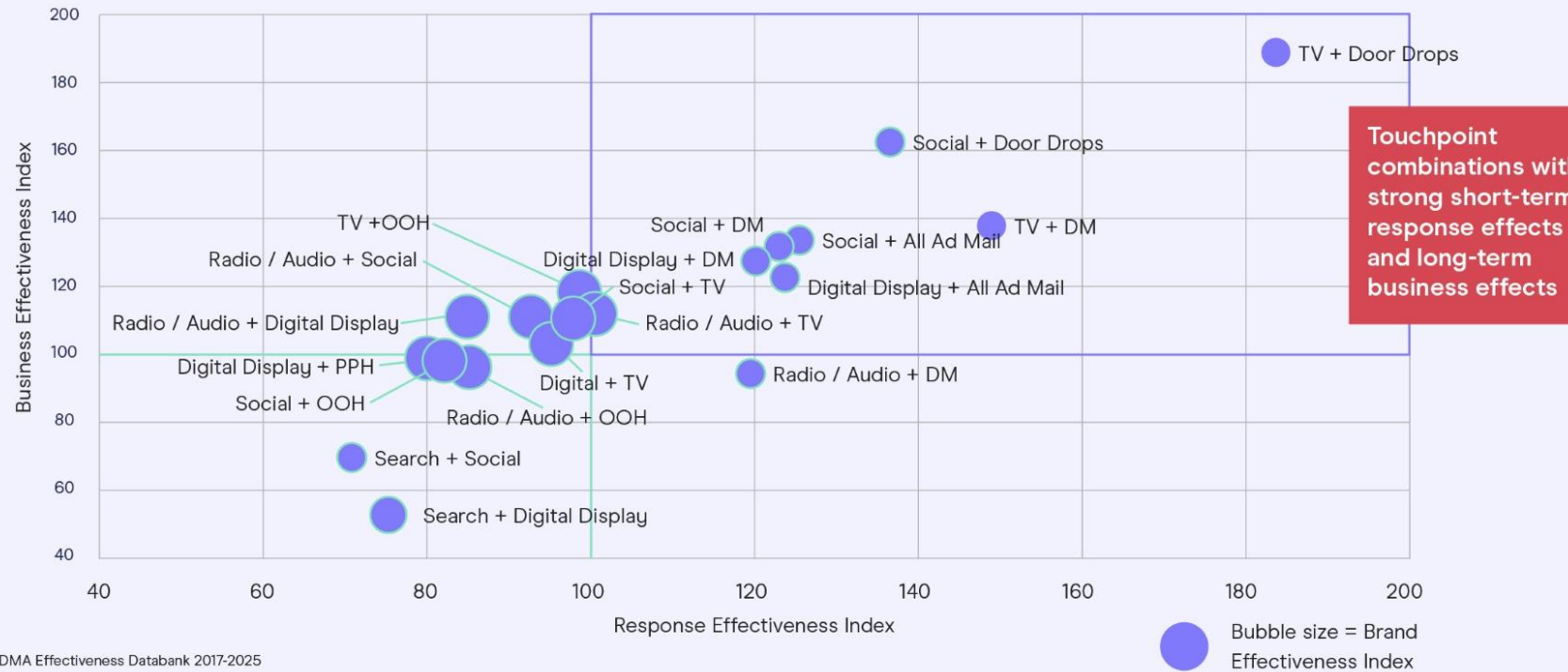
Mail Media Metrics

# Mail drives acquisition, retention and recommendation



# Mail is part of the key channel combinations that deliver short and long-term effectiveness

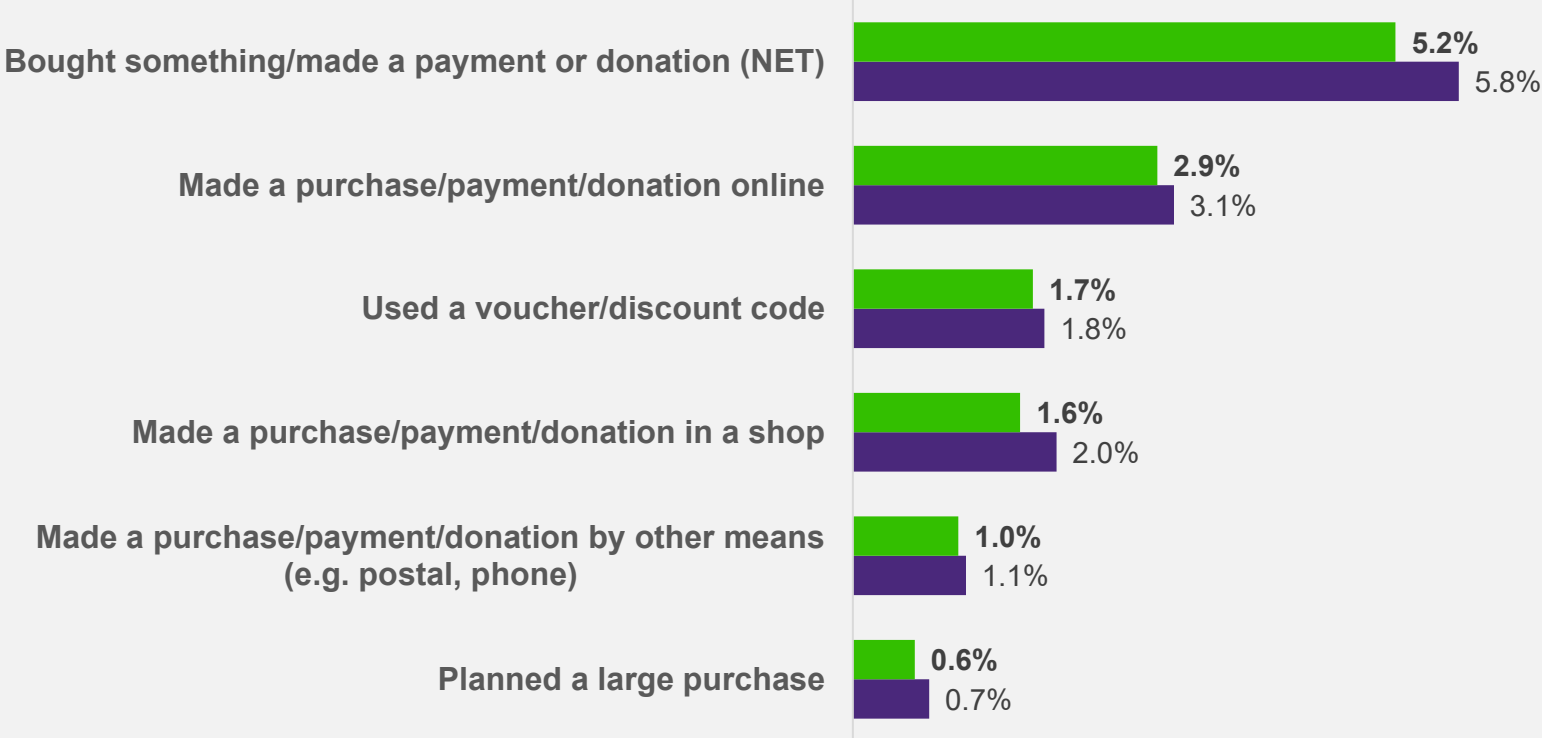
## Response Effectiveness vs Business Effectiveness of Touchpoint Combinations



# Mail's purchase effectiveness down marginally year-on-year – primarily driven by in-store purchase declines

Customer Acquisition

## Commercial Actions (All Mail Types) % of mail items



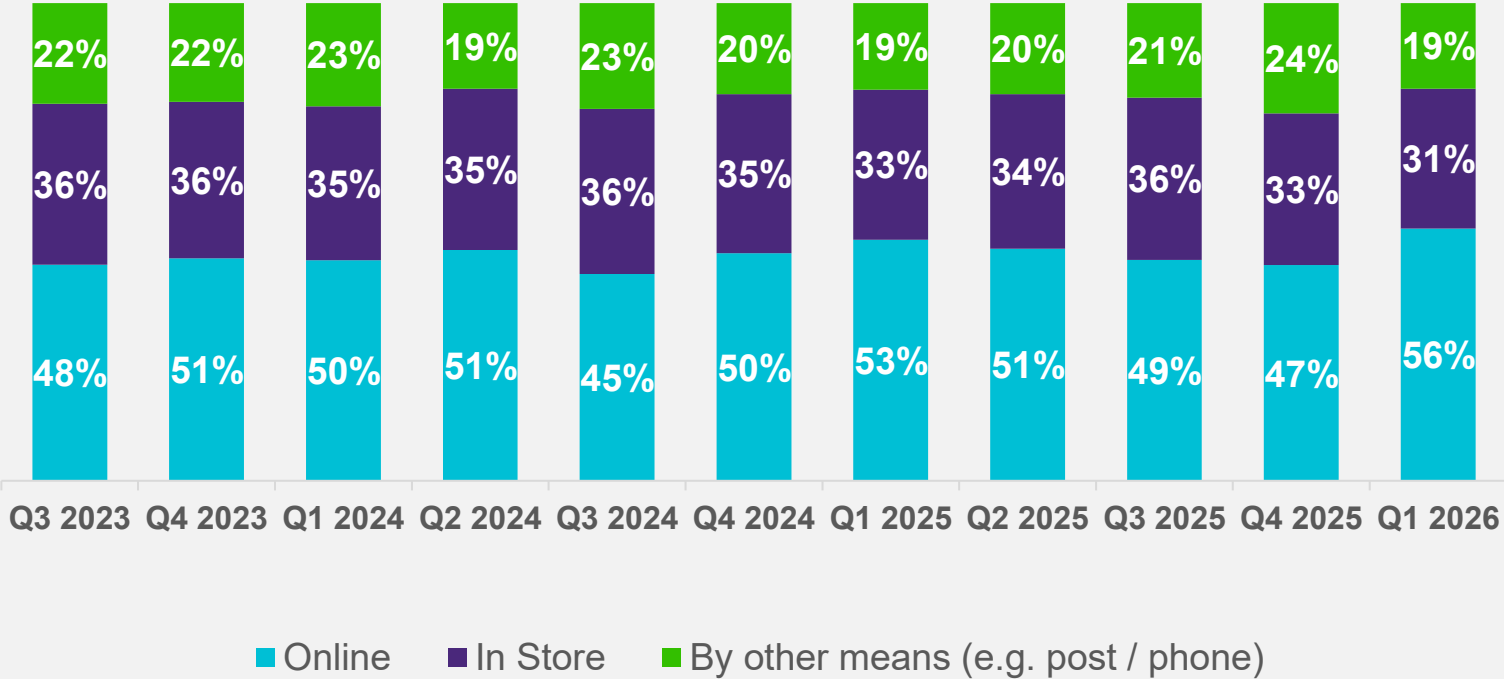
■ Q1 2026 ■ Q1 2025

Source: JICMAIL Item Data Q1 2025 n=10,806 mail items; Q1 2026 n=10,109 mail items

# However, a record share of online purchases was triggered by mail in Q1

The share of purchases triggered by mail that are then transacted online, increased to 56% in Q1 2026 - a record level since this metric was first tracked in Q3 2023.

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



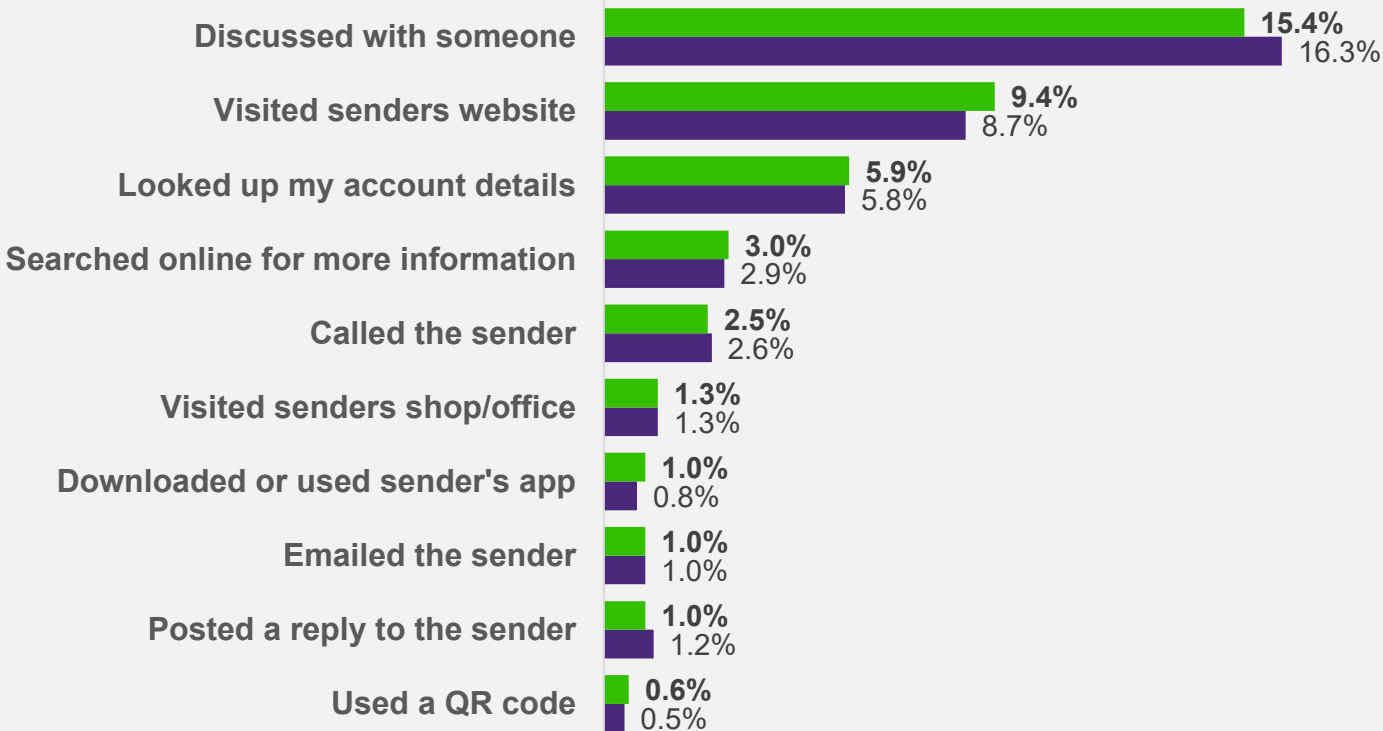
Mail Media Metrics

Source: JICMAIL Item Data Q3 2023 to Q1 2026 n=111,933 mail items

# Website visits, account look-ups, web searches and app downloads prompted by mail all up year-on-year

Customer Retention and Recommendation

### Commercial Actions (All Mail Types) % of mail items

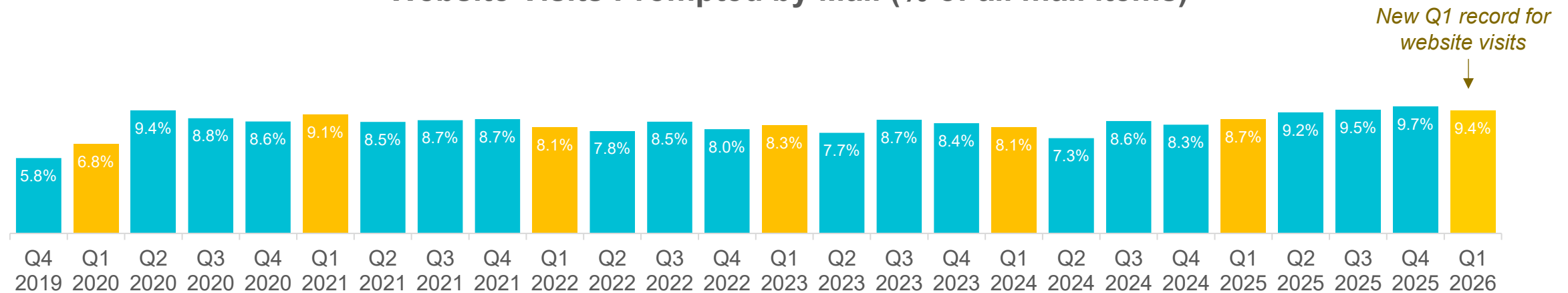


■ Q1 2026 ■ Q1 2025

Source: JICMAIL Item Data Q1 2025 n=10,806 mail items; Q1 2026 n=10,109 mail items

# 9.4% of mail prompting a website visit is a new Q1 record

## Website Visits Prompted by Mail (% of all mail items)



Mail Audiences Q1 2026

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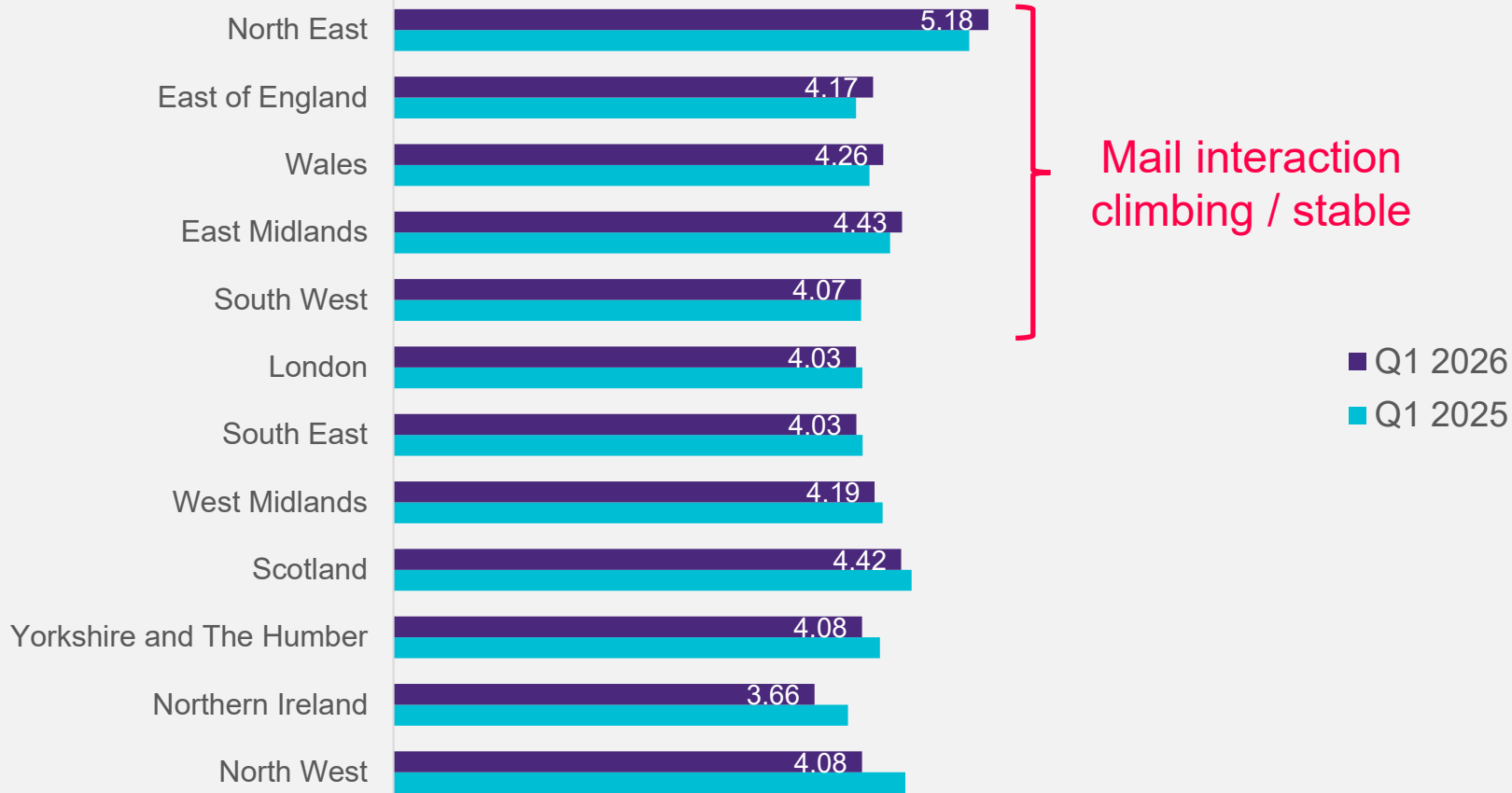
# The New JICMAIL Geo Planning Tool



Mail Media Metrics

# Mail engagement up in the North-East, East, East Midlands and Wales in Q1 2026

### Frequency of Interaction / Exposure by Government Office Region (GOR) - All Mail Types



Mail interaction climbing / stable

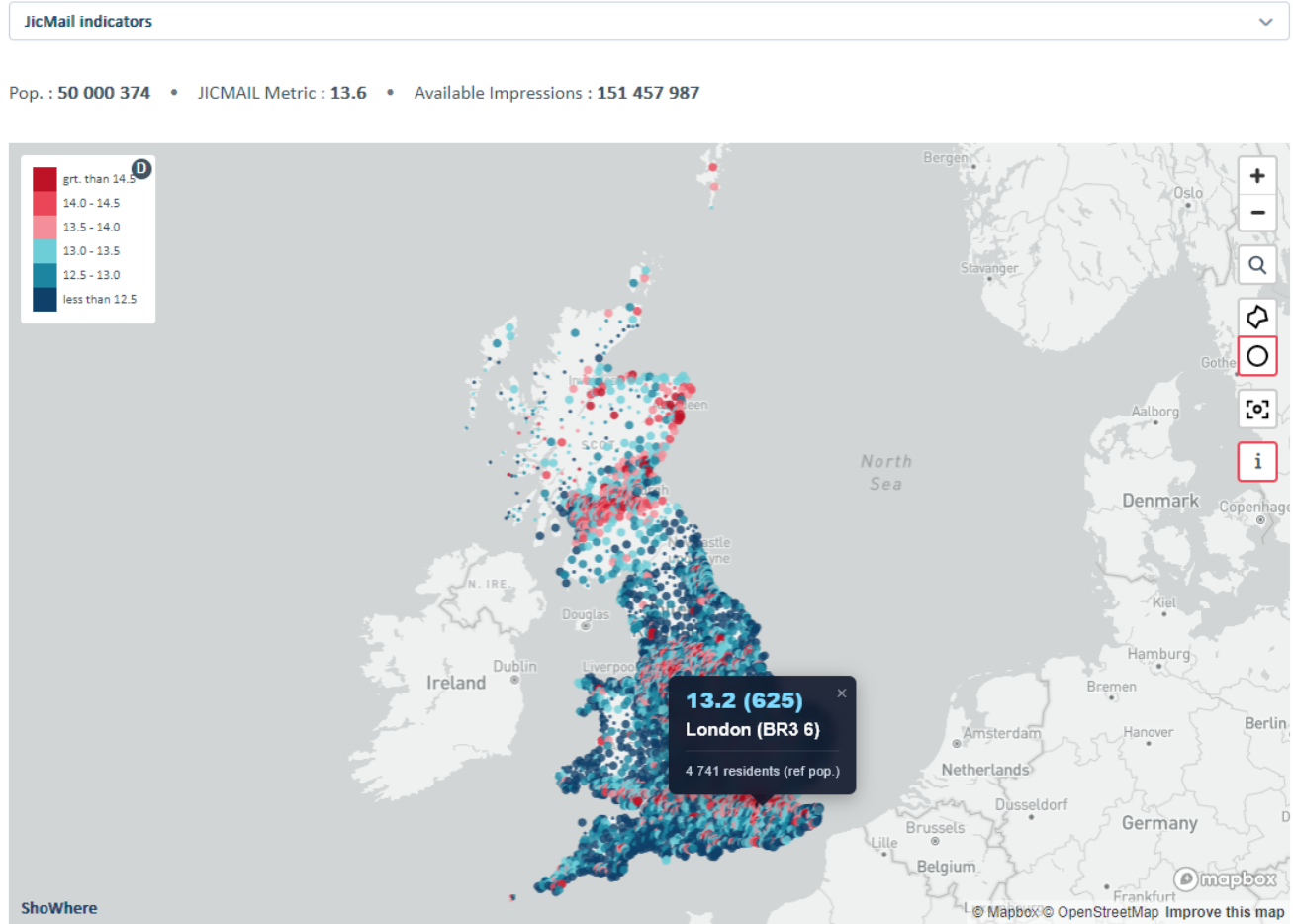
■ Q1 2026  
■ Q1 2025



Source: JICMAIL Item Data Q4 2019 to Q4 2025 n=263,811 items  
Data displayed for Household Co-ordinator only

# JICMAIL's new Geo Planning Tool takes mail measurement from region to postcode sector level

For example, the heat map points towards Door Drop commercial effectiveness (the % of Door Drops driving any commercial outcome) being highest in London and other built-up areas.



Door Drops - Any commercial action

Addressed Advertising | **Door Drops : Any commercial action** | Business Items | Partially Addressed

Choose one or more areas...

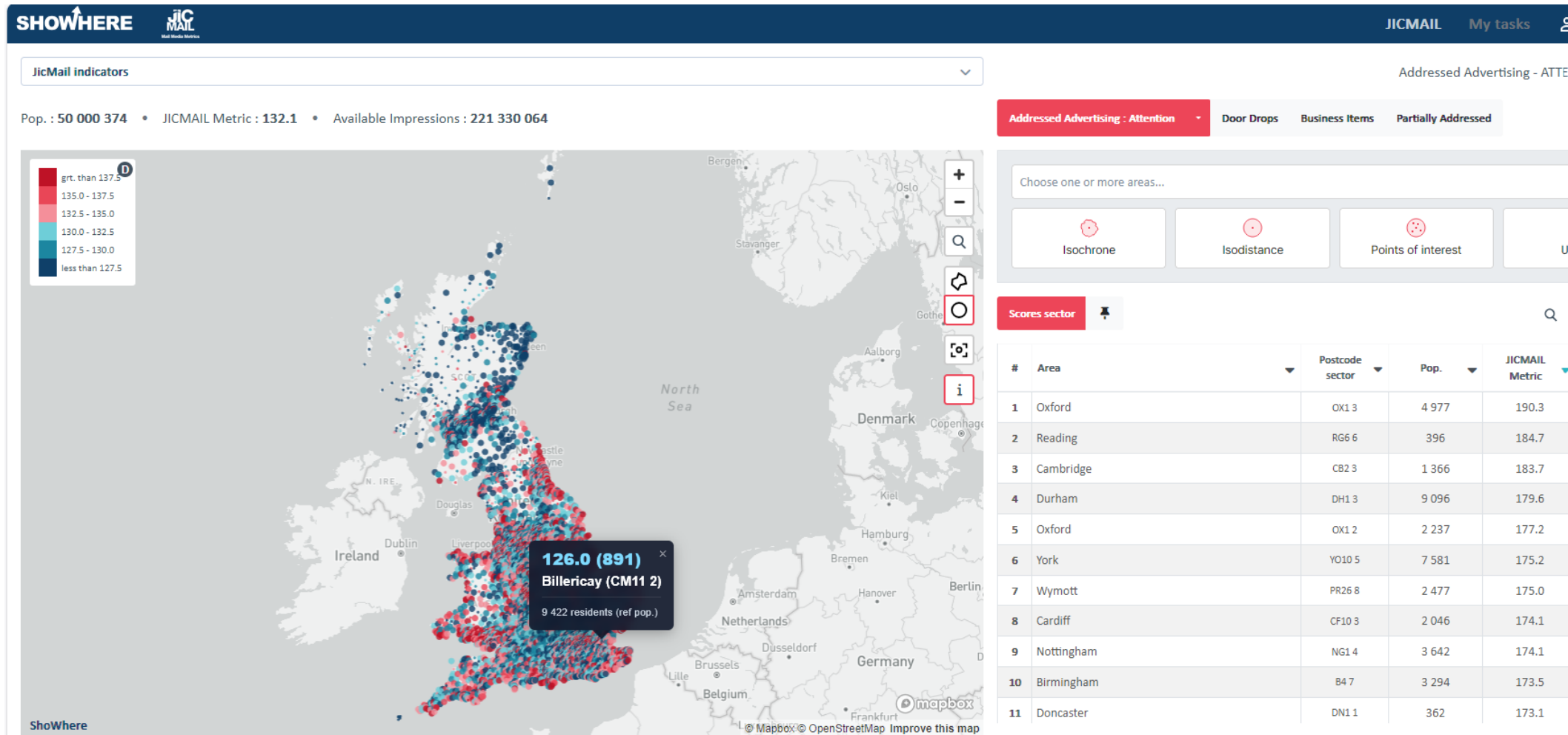
Isochrone | Isodistance | Points of interest

Scores sector

#	Area	Postcode sector	Pop.	JICMAIL Metric
4977	Lancing	BN15 9	9 008	13.2
4978	Eastbourne	BN21 3	5 092	13.2
4979	London	BR3 6	4 741	13.2
4980	Orpington	BR5 1	9 683	13.2
4981	Weston-Super-Mare	BS23 4	6 864	13.2
4982	Keynsham	BS31 1	6 325	13.2
4983	High Littleton	BS39 6	2 641	13.2
4984	Wroughton	BS40 5	3 594	13.2
4985	Maryport	CA15 8	3 779	13.2
4986	Kingstown	CA6 4	3 091	13.2
4987	Radyr	CF15 8	5 227	13.2

# Mail engagement and effectiveness metrics available across Direct Mail, Door Drops and Business Mail

For example, Direct Mail Attention is found to be highest in Oxford, Reading and Cambridge postcode sectors.



Mail Response: Full Year 2025

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# The Response Rate Tracker



Mail Media Metrics

# What the Response Rate Tracker is used for

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## **Benchmarking**

Assess the performance of past campaigns against benchmarks from the same industry sector.



## **Target Setting**

Set realistic performance targets for upcoming campaigns by introducing more accurate inputs into business forecasting models.



## **Validating**

Compare self-reported JICMAIL panel data to campaign-level performance benchmarks.

# Fifteen participating organisations

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Mail Media Metrics

# Anonymous campaign level data gathered by JICMAIL, including the following details...

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## 1. ANONYMOUS ADVERTISER DETAILS

Industry Sector

Product Level

## 2. MAIL DETAILS

Mail Type

B2B or B2C

Cold or Warm

Brand or Response

## 3. CAMPAIGN DETAILS

Start and End Date

Volumes

Burst / Repeat?

Budget

## 4. RESPONSE DATA

Response Metric Measured

Response Rate

CPA and AOV\*

ROI\*

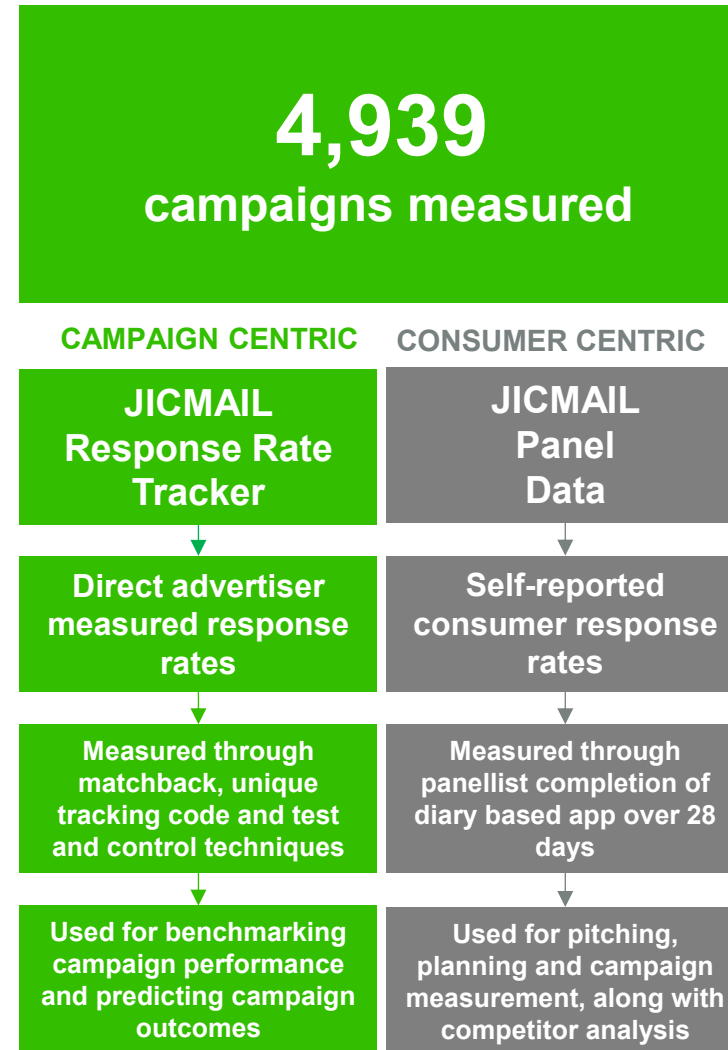


Mail Media Metrics

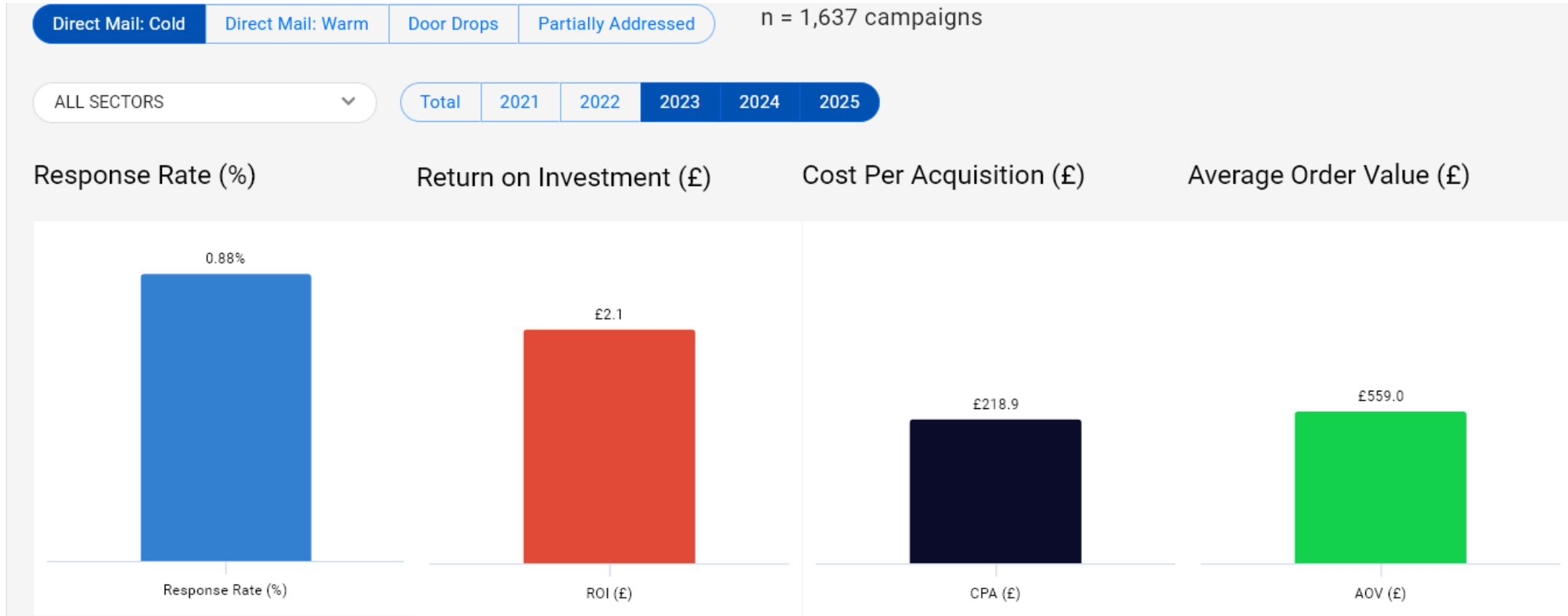
\* not reported for all campaigns

# Campaign data vs JICMAIL panel data

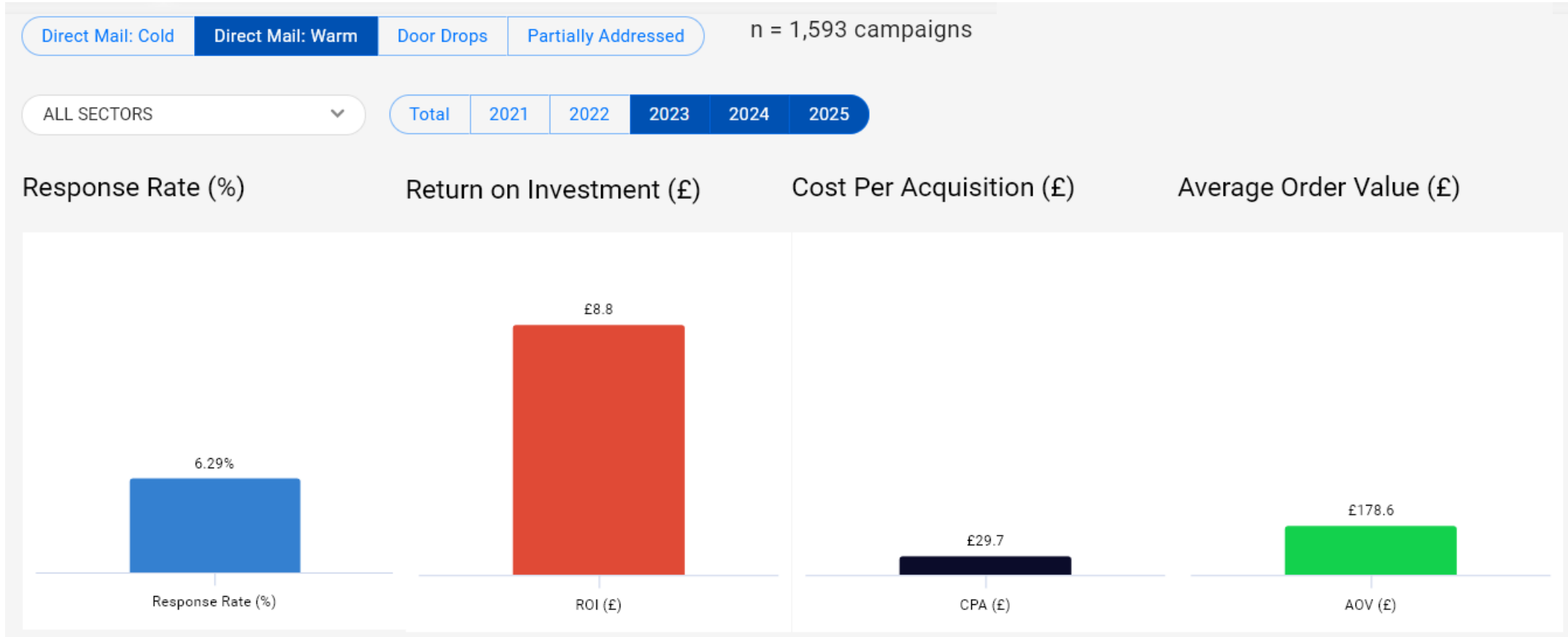
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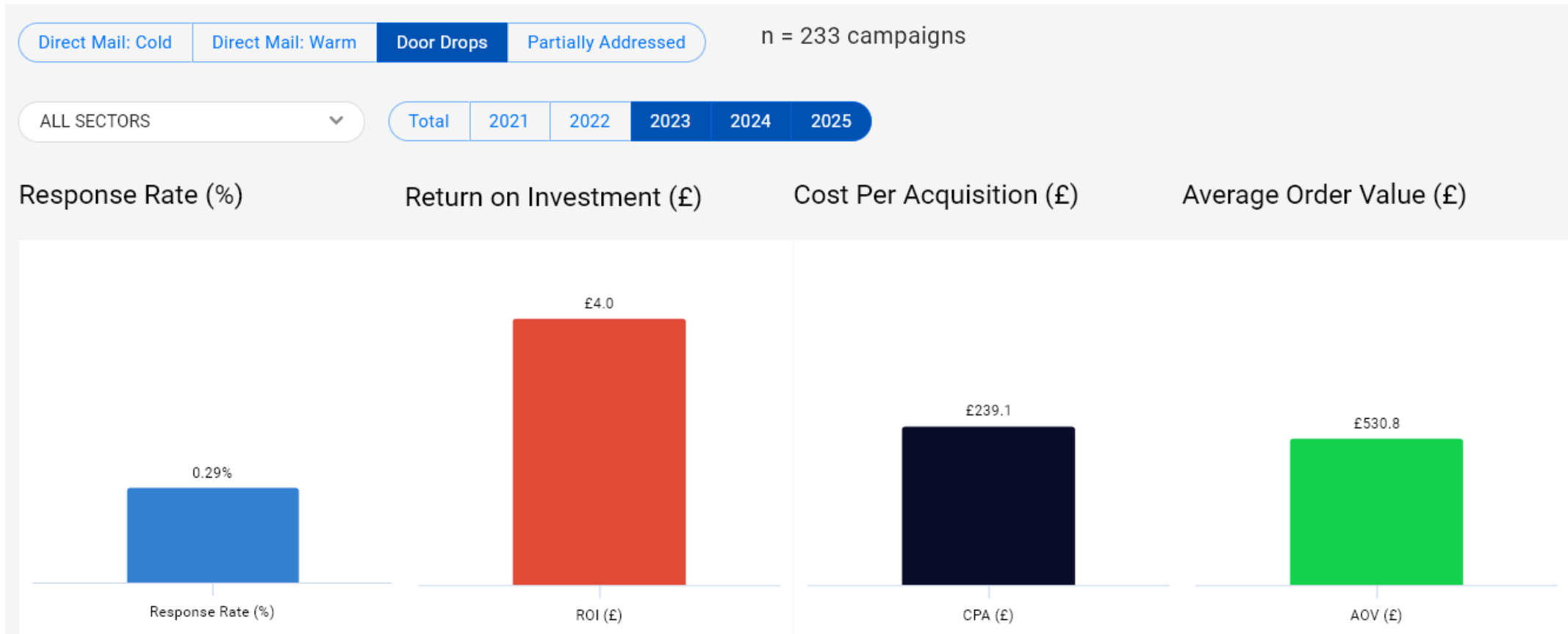
# Cold Direct Mail: 1% Response Rate and ROI of £2.10



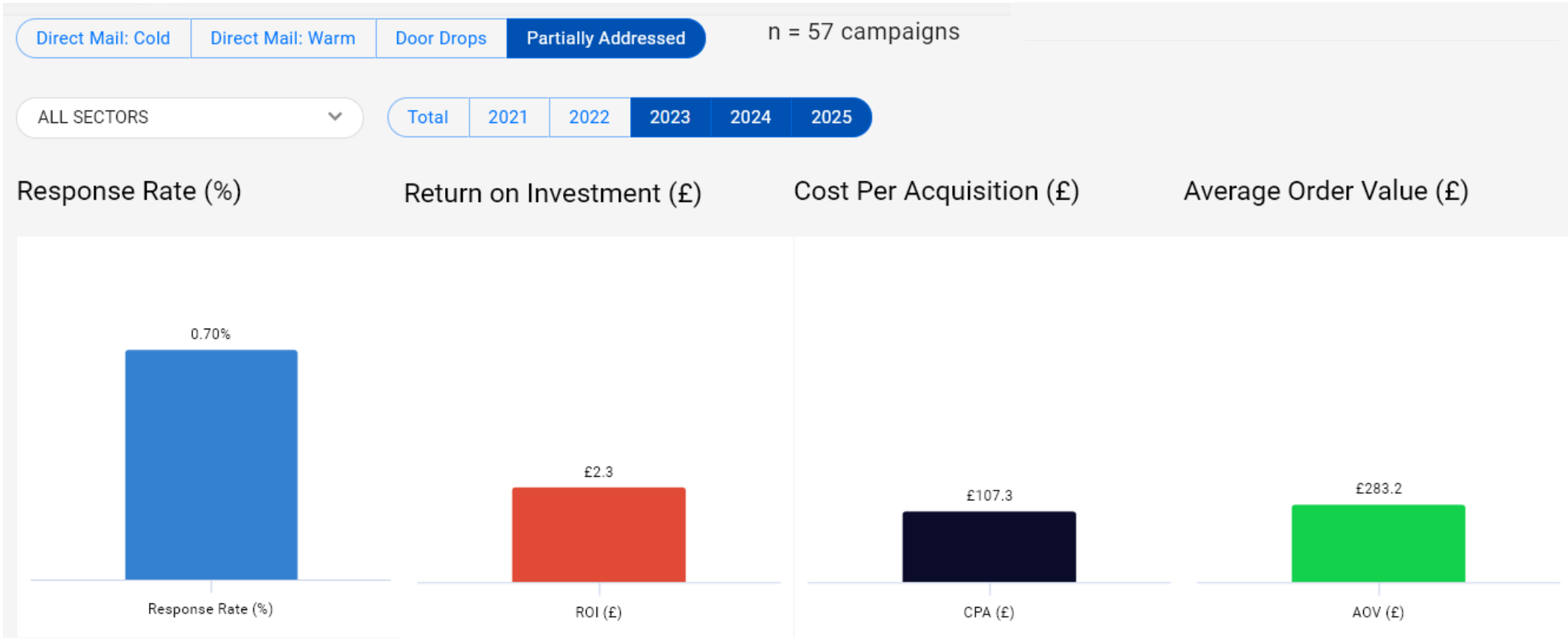
# Warm DM: 6.3% Response Rate and ROI of £8.80



# Door Drops: 0.3% Response and ROI of £4.0



# NEW FOR 2025: PAM Response of 0.7% and £2.30 ROI



# Response rates for Warm Direct Mail from Retailers have grown in 2025

## Key Metric Trends by Sector

Direct Mail: Cold

Direct Mail: Warm

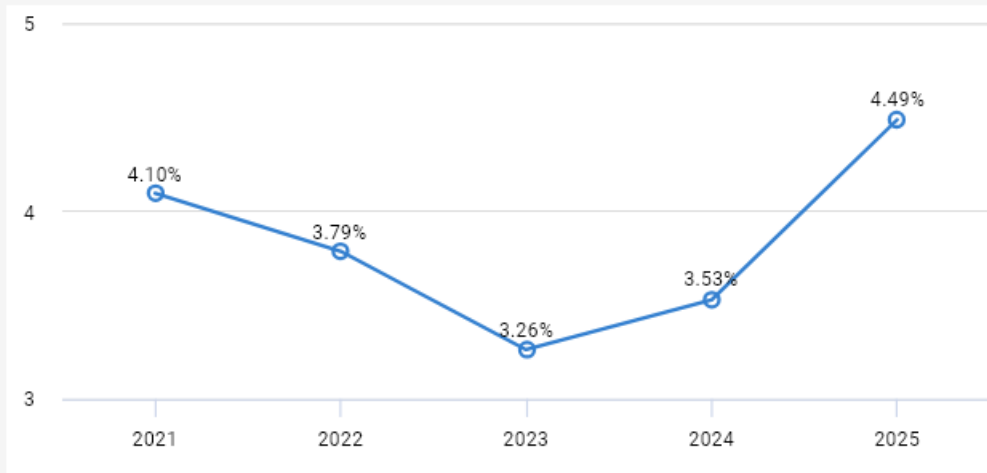
Door Drops

Partially Addressed

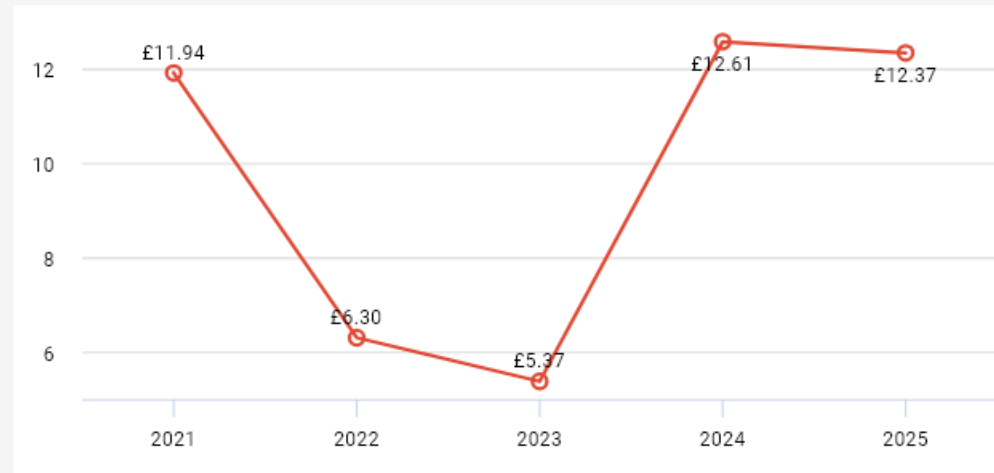
Retail / Online Retail

n = 884 campaigns

### Response Rate (%)

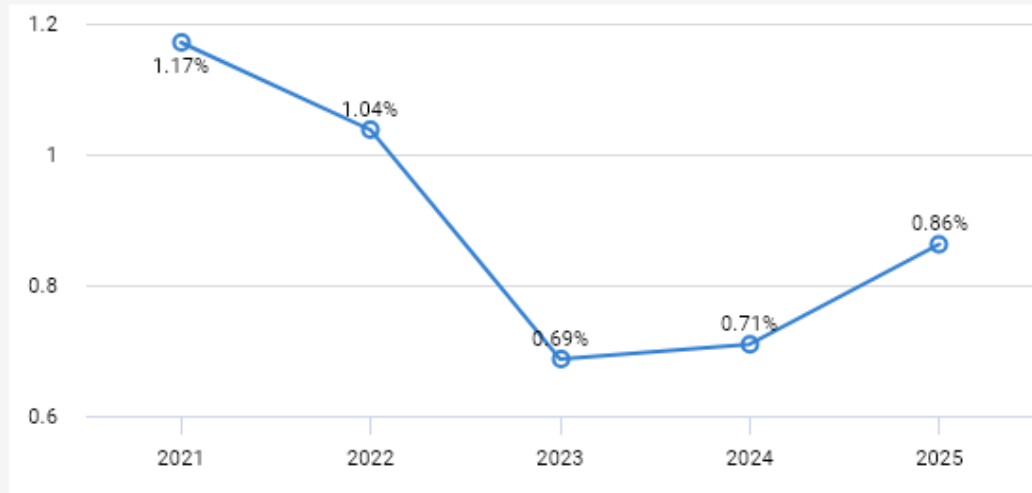


### Return on Investment (£)

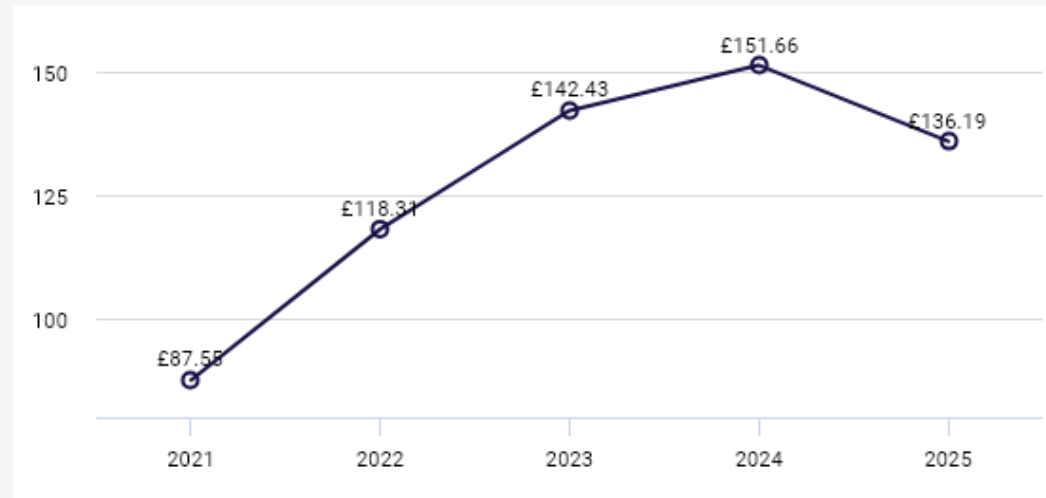


# Response rates for Cold / Acquisition Direct Mail from Retailers has grown while cost per acquisition is down

Response Rate (%)

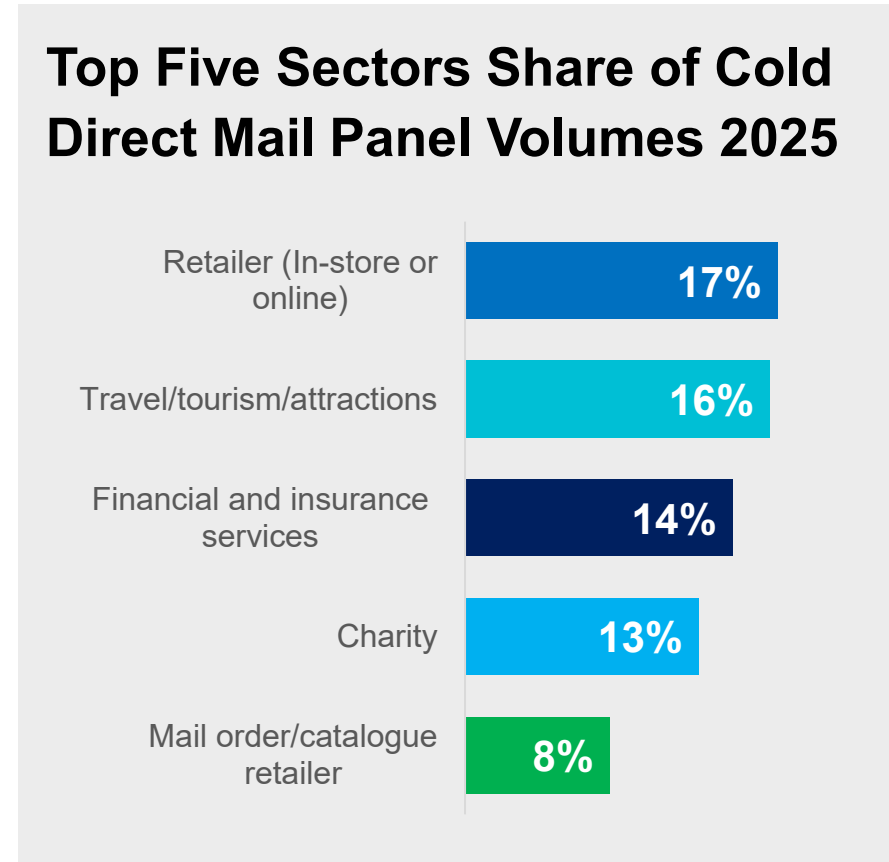
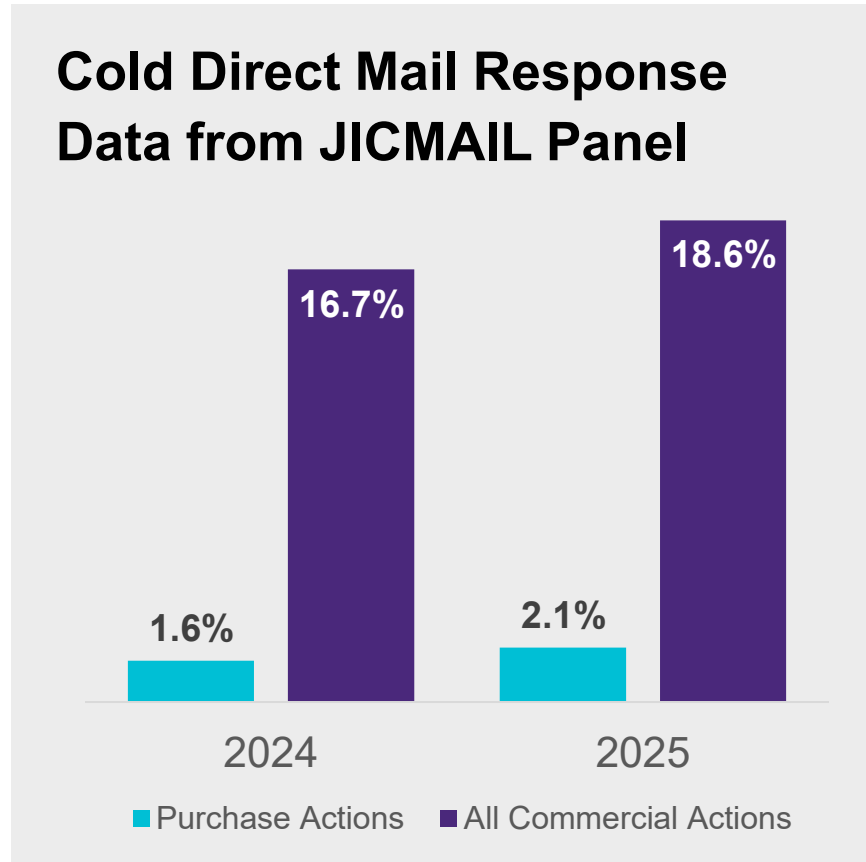


Cost Per Acquisition (£)



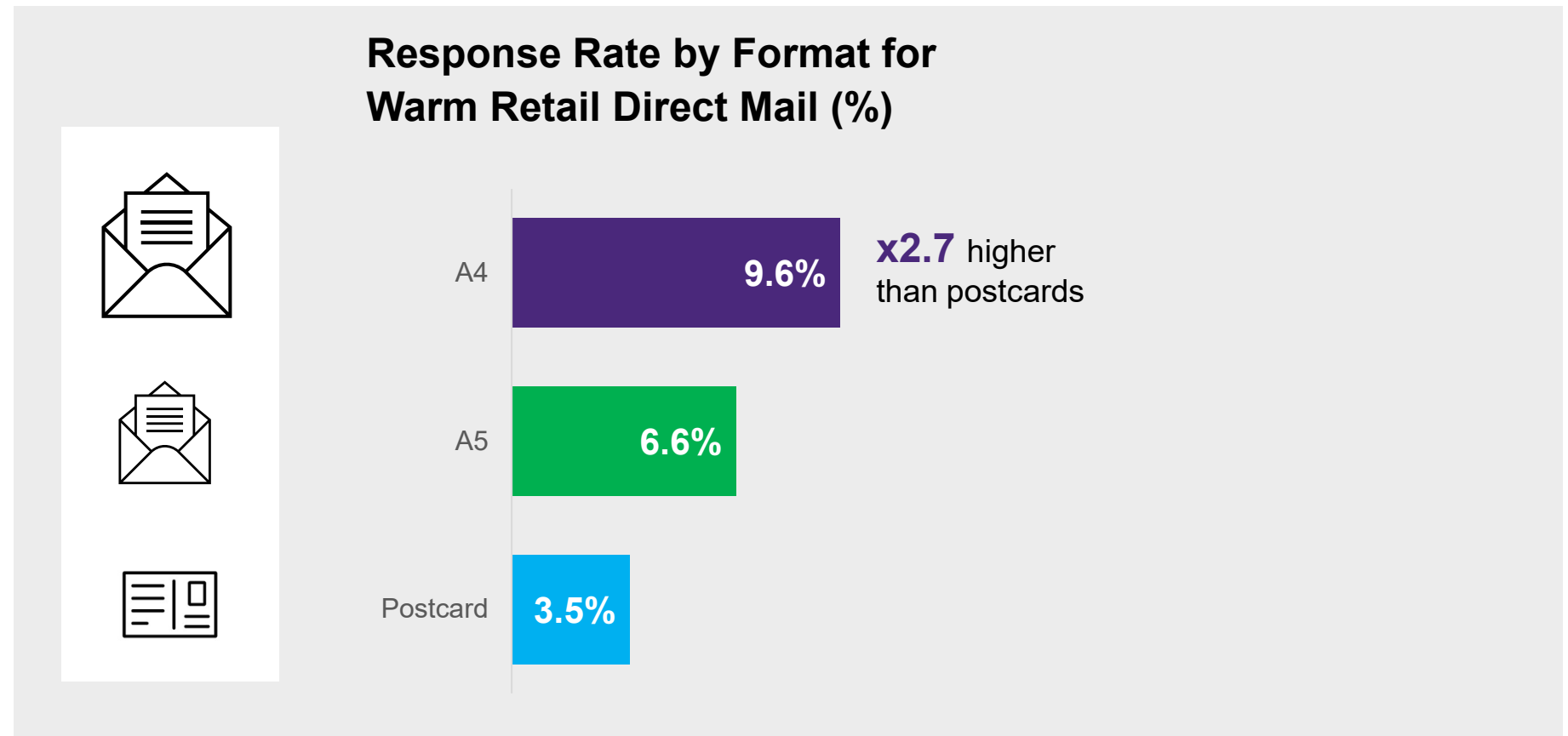
# Growth in Cold DM Response mirrors JICMAIL panel trends

Self-reported data from JICMAIL panellists has also revealed growth in cold DM response rates year in year in 2025 – providing a good validator of both data sets.



Source: JICMAIL Item Data 2024-2025 n=9,883 Cold Direct Mail Items (i.e. not targeted at existing customers)

# The Response Rate Tracker is beginning to answer questions about the effectiveness of specific formats



Advertiser Activity Q1 2026

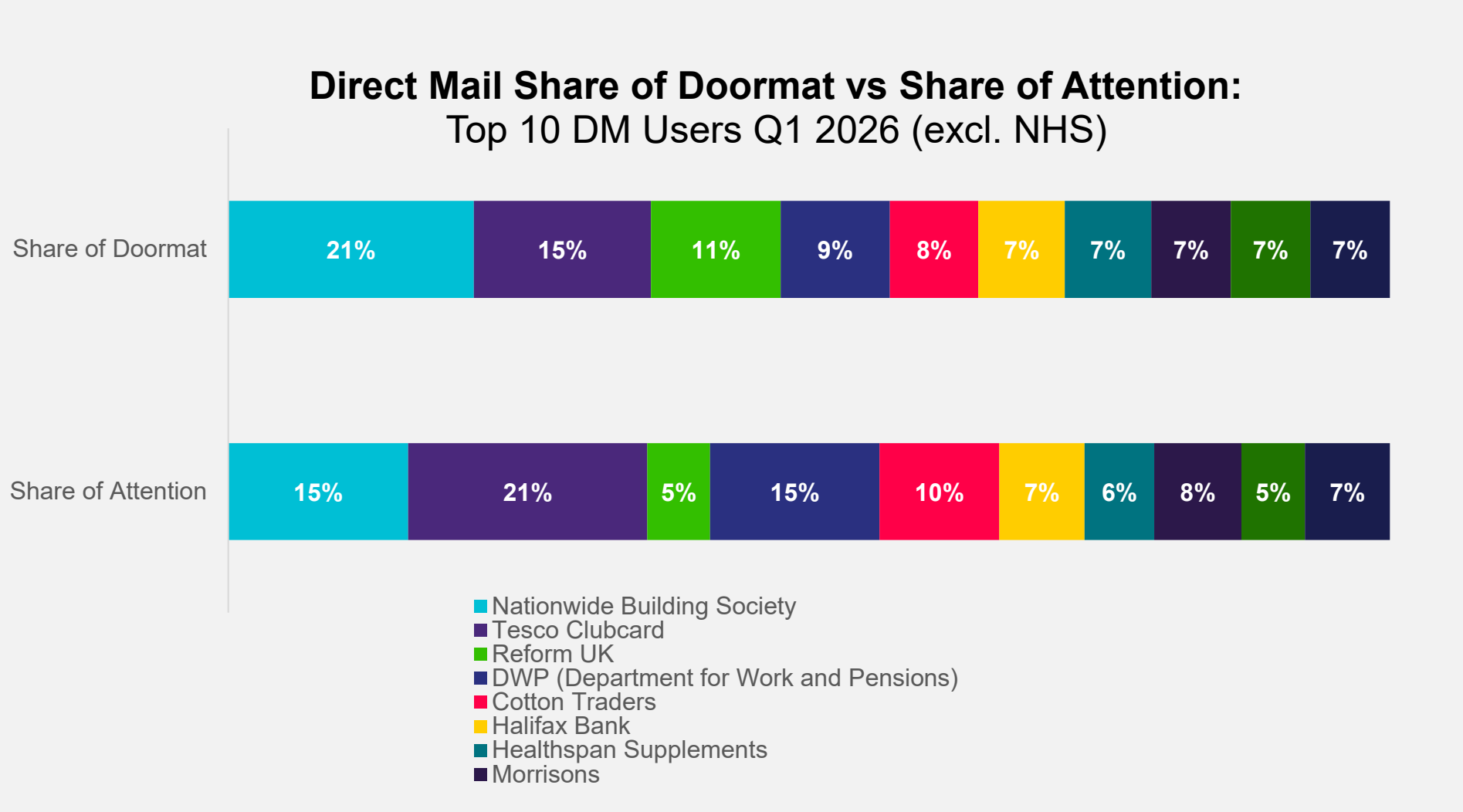
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# Share of Doormat and Attention



Mail Media Metrics

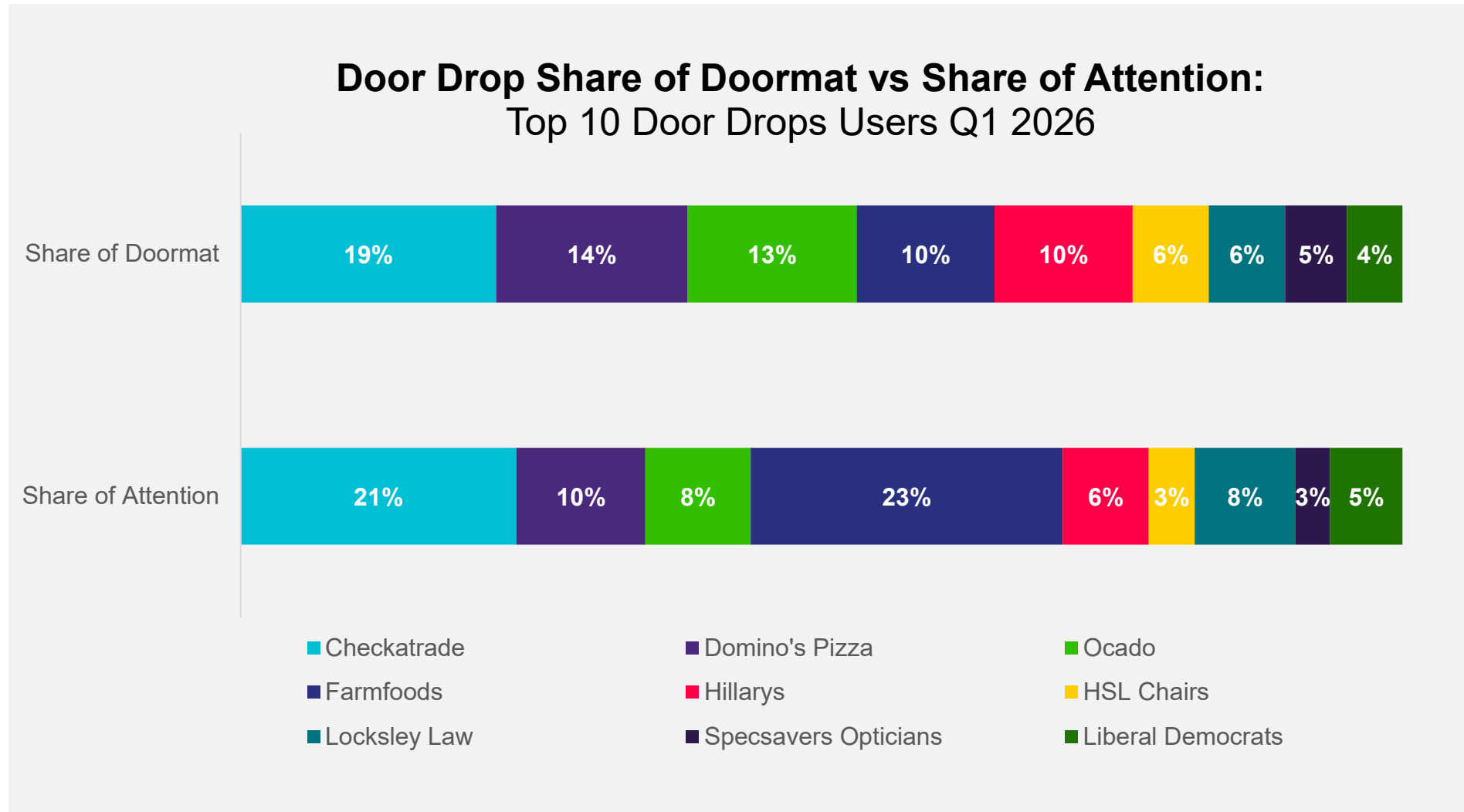
# Tesco Clubcard continues to take a disproportionately high share of DM attention. Reform a disproportionately low show



# Top performing DM creatives from Q1 2026



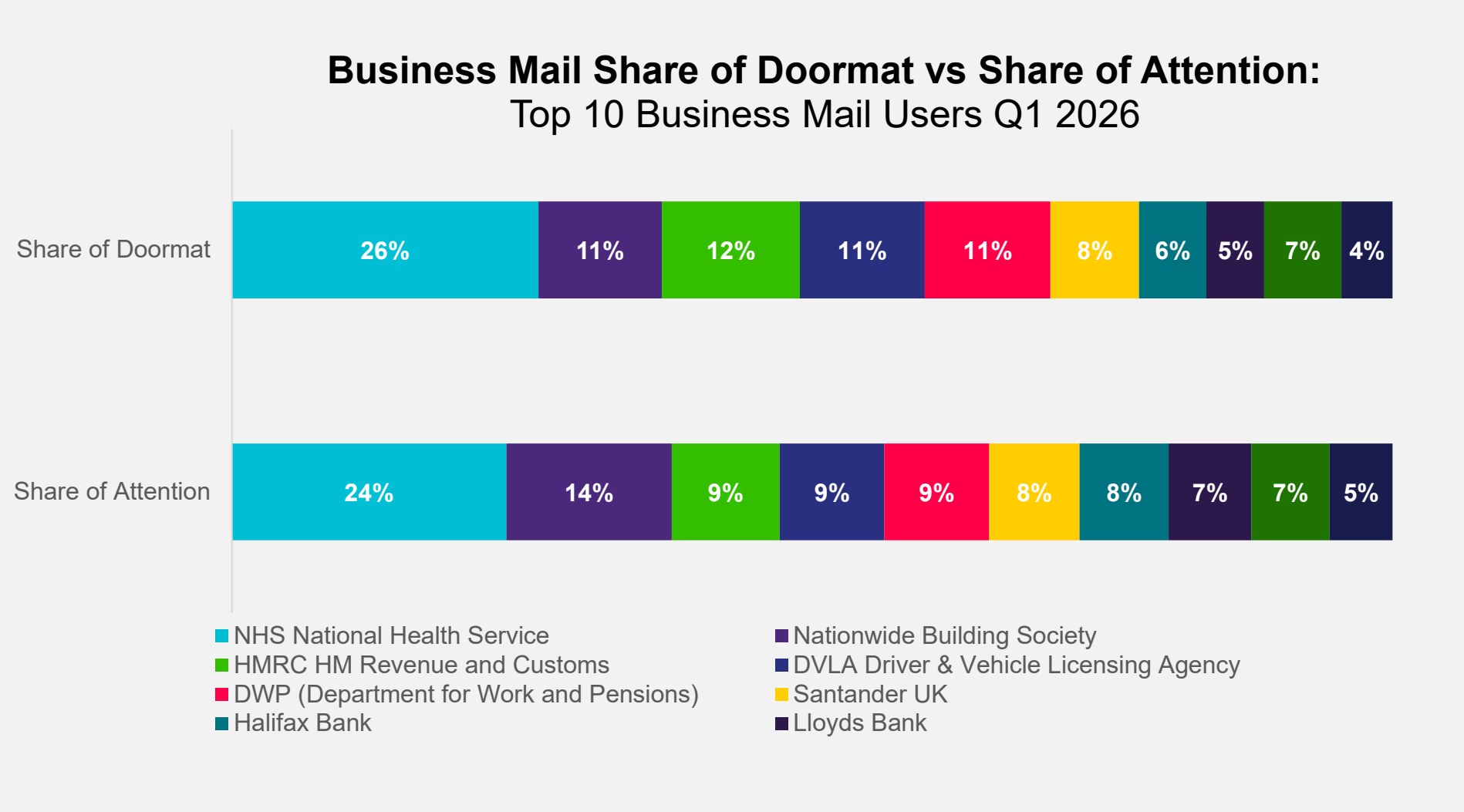
# Farmfoods achieves over double the share of Door Drop attention versus share of doormat



# Top performing Door Drop creative from Q1 2026



# Nationwide over-performing for share of Business Mail attention



# Top performing Business Mail creative from Q1 2026



Helping you spend less on your groceries is important to us and we're committed to bringing prices down wherever we can. So, to get the best value from your shop, look out for Aldi Price Match and exclusive Clubcard Prices. And remember, you'll collect points when you scan your Clubcard too.

**Just for you, extra savings worth £7**

To say thank you for shopping with us, we're giving you 3 money-saving coupons to use in-store. You can also find your coupons in the Tesco app.

Don't have our app yet? Download now and join the millions of members already enjoying the benefits.

Zoe Evans  
UK Customer Engagement Centre

£2 off when you spend £20 or more

30 YEARS OF REWARDS  
30% Clubcard Bonus

£2 off when you spend £20 or more

For use in-store only. Exclusions apply.

Valid from 15/05/25 until 31/05/25

COUPON 1

COUPON 2

COUPON 3

whistl Delivered by Royal Mail CS 10002

SAVE ON YOUR FAVOURITES TODAY  
with Your **BOOTHS** Card



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# Thanks

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 [@jicmailuk](https://twitter.com/jicmailuk)

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