

JICMAIL Quarterly Results

Q1 2026

The logo features the text "JICMAIL" in a bold, white, sans-serif font. The "J" and "I" are connected, and the "C" is slightly larger. Below the text is a small illustration of a bowl containing various fruits, including bananas and apples, rendered in a light blue color that matches the 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%.

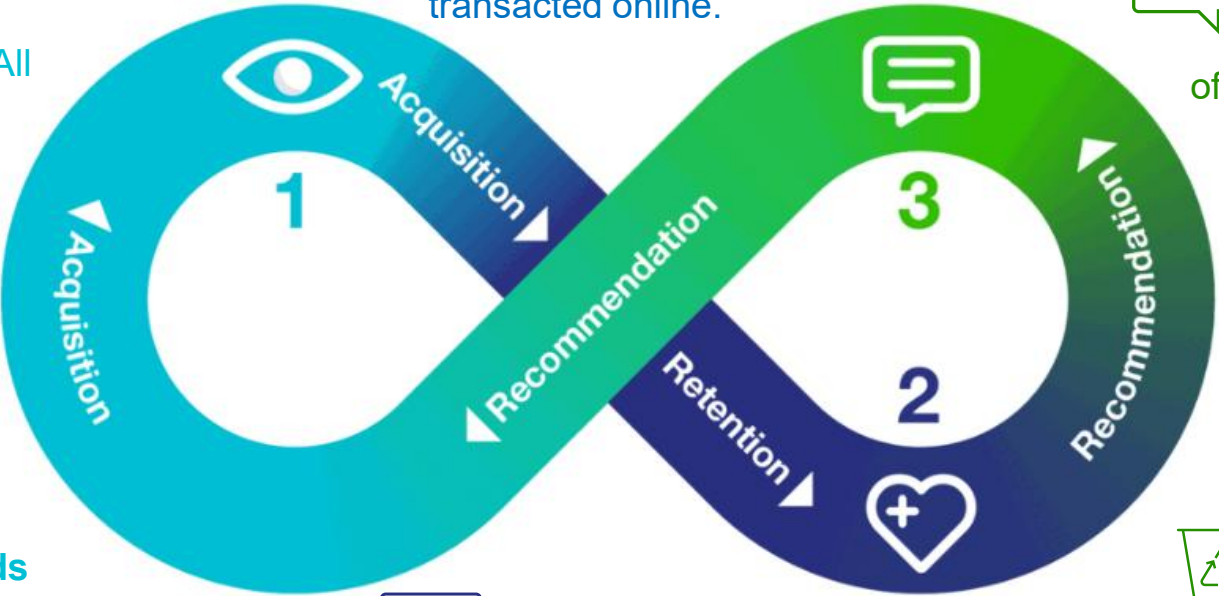
 **56%**

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

1.

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.

2.

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.

3.

Geo Planning

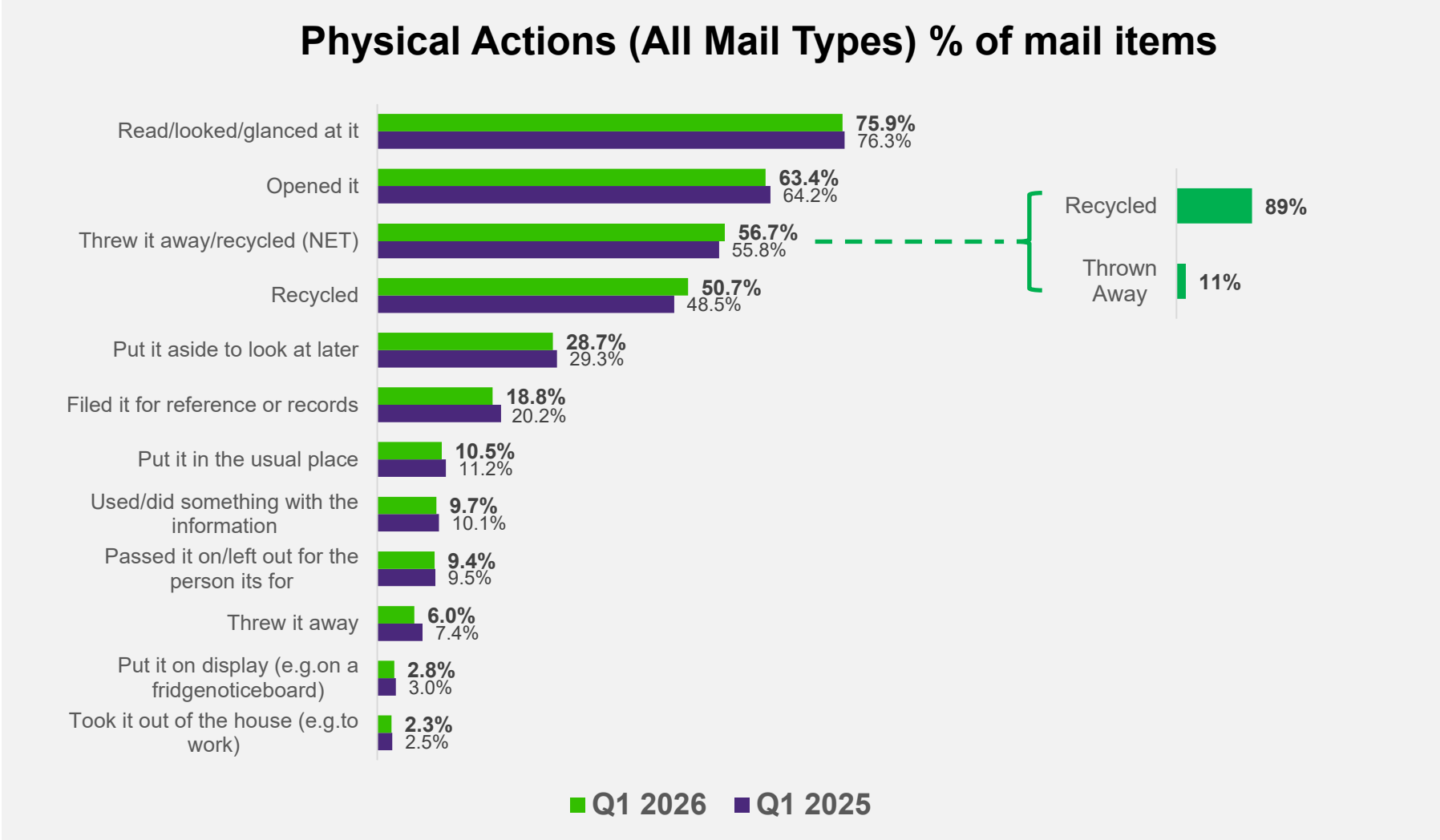
The recently released geo-planning tool from JICMAIL reveals a wealth of mail engagement data across 9,000 GB postcode sectors. Door Drop commercial effectiveness (the % of Door Drops driving any commercial outcome) is highest in London and other built-up areas, while Direct Mail Attention is found to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

Mail Engagement Q1 2026

Reach, Frequency, Lifespan and Attention

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

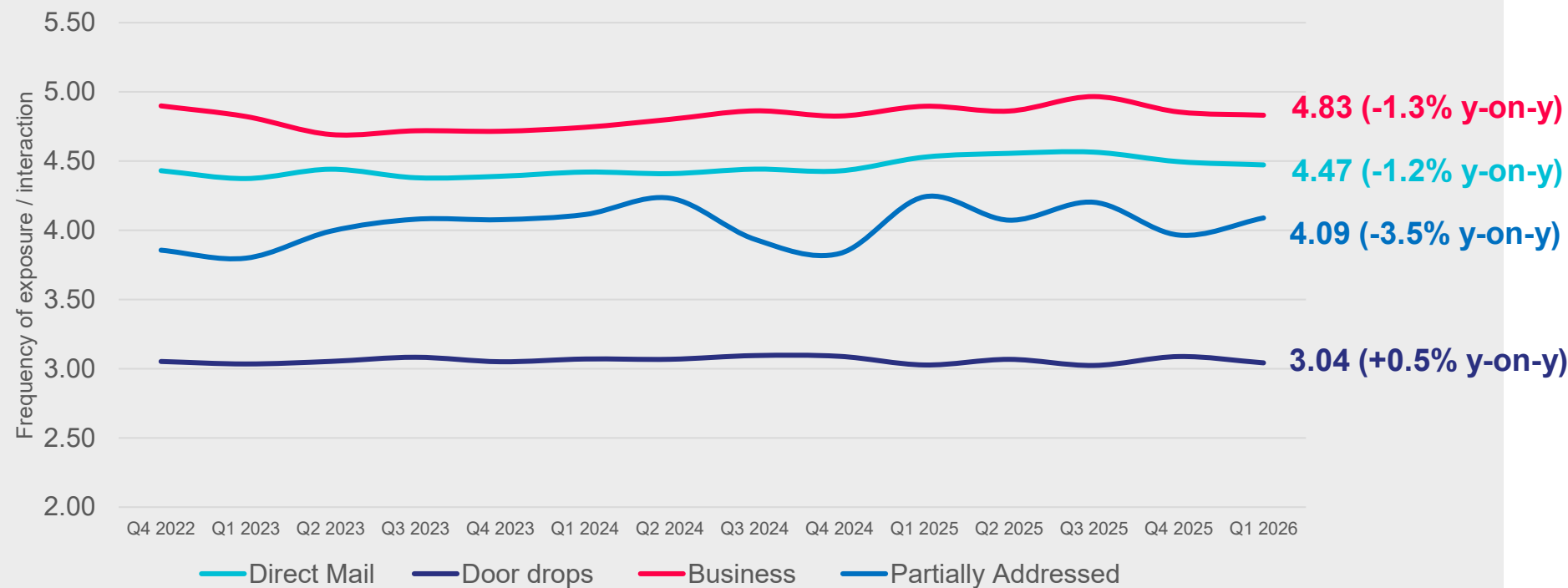
Frequency of engagement also stable year on year

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.



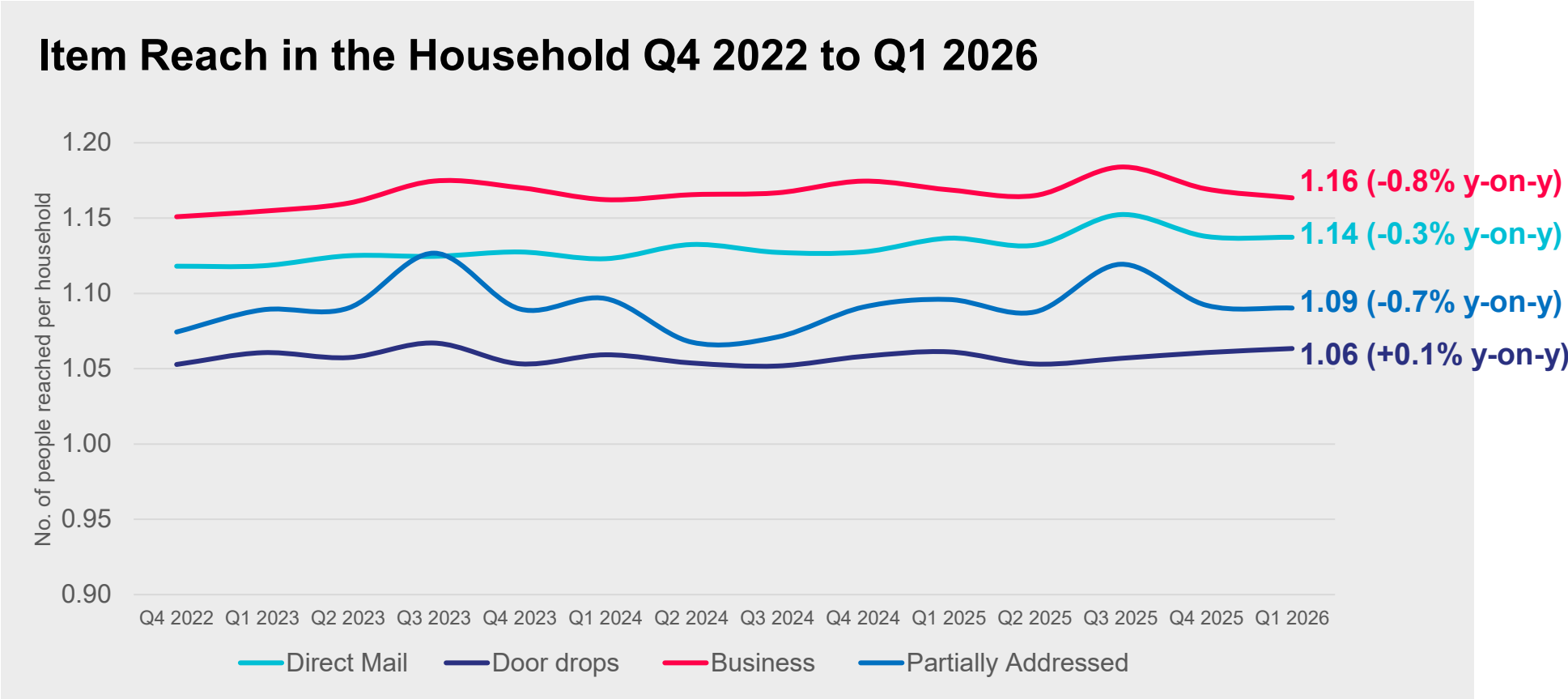
Frequency of Interaction / Exposure Q4 2022 to Q1 2026



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



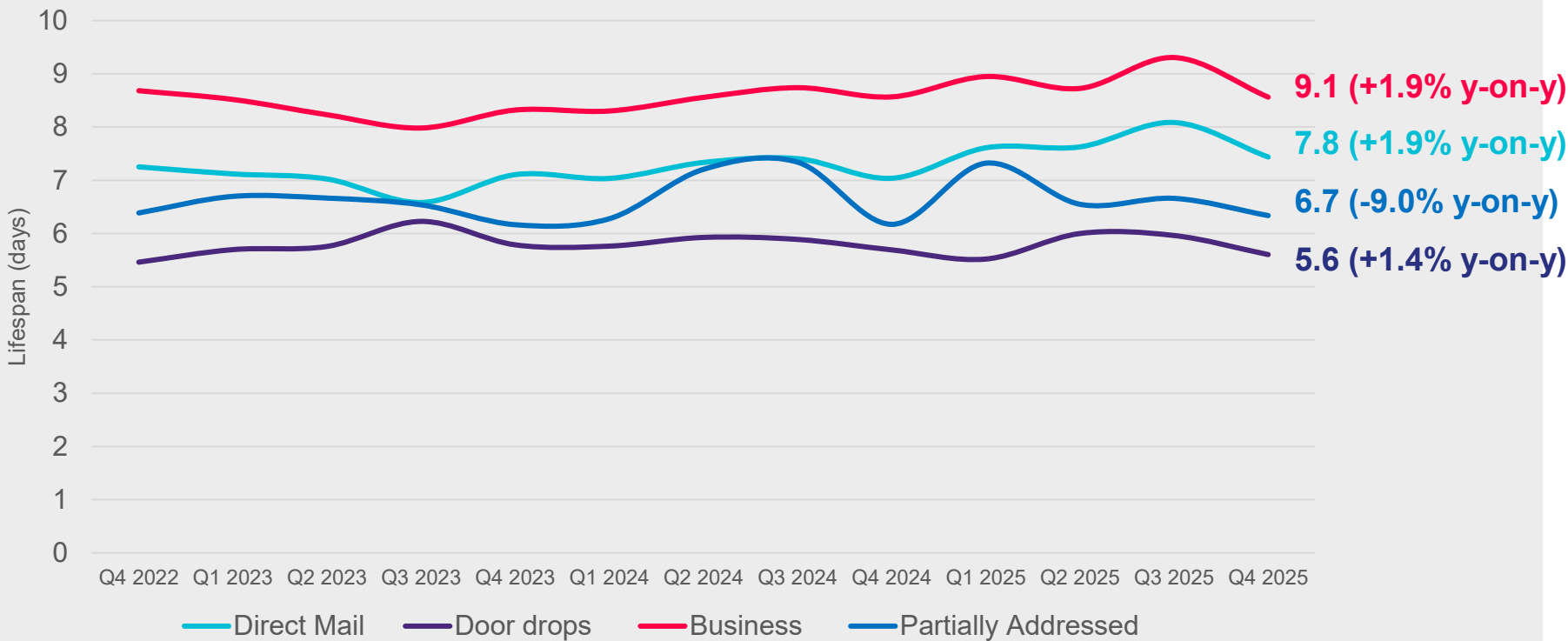
Source: JICMAIL Item Data Q4 2022 to Q1 2026 n=143,525 mail items

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.

Lifespan (days) Q4 2022 to Q1 2026

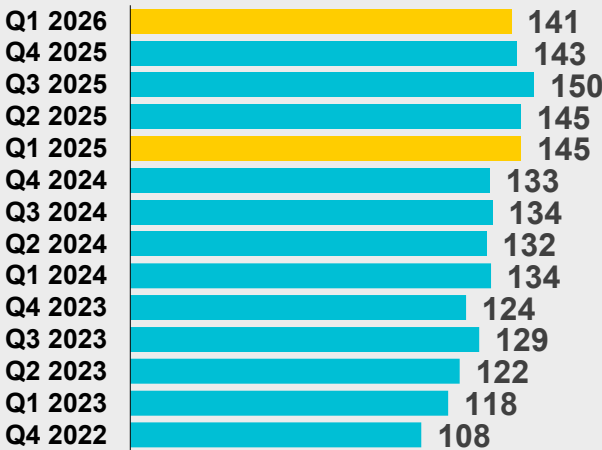


Source: JICMAIL Item Data Q4 2022 to Q1 2026 n=143,525 mail items

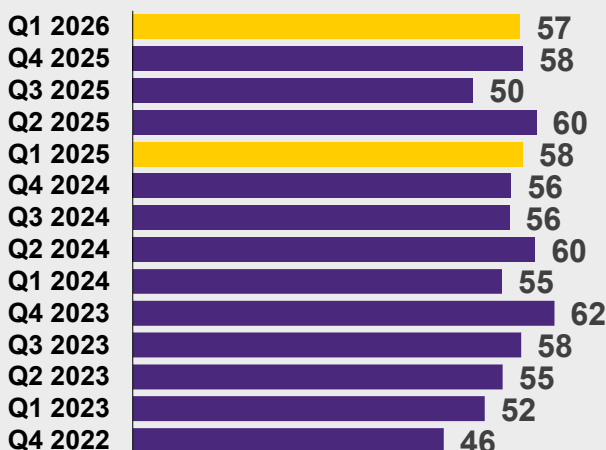
Direct Mail attention holds at over 140 seconds; Door Drops are looked at for just under a minute

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)



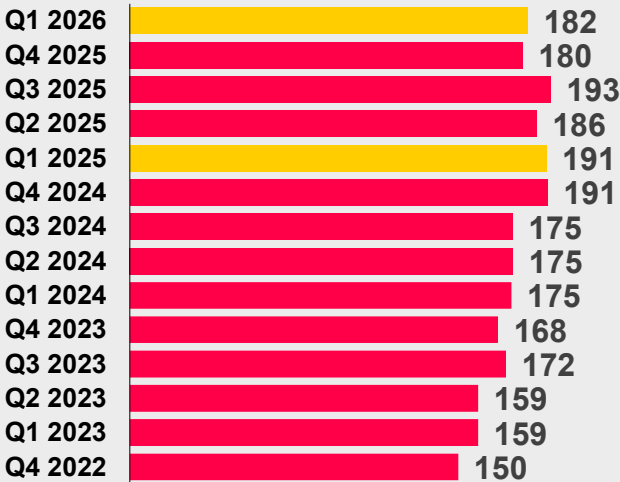
Door Drop Attention (seconds interacted with per item)



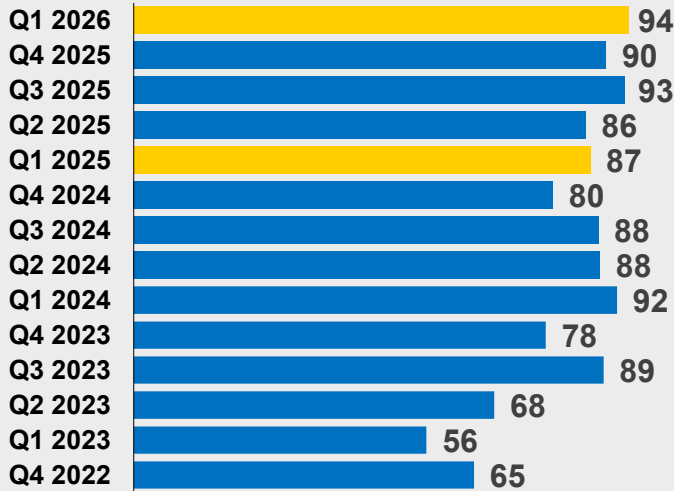
Partially Addressed attention up by seven seconds

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)

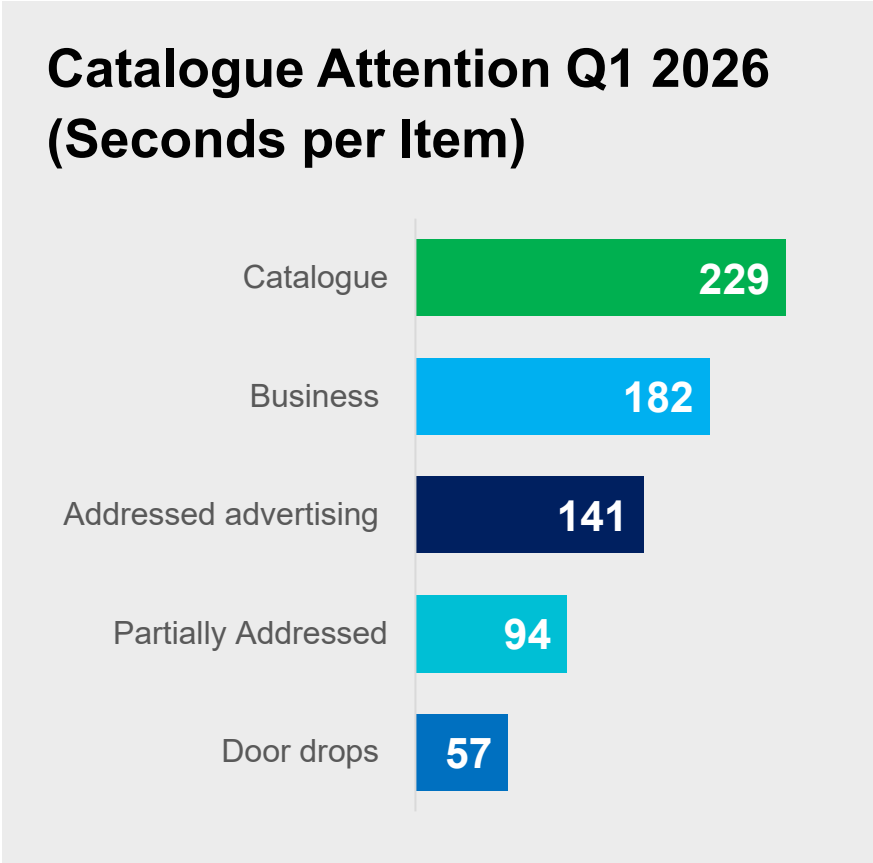
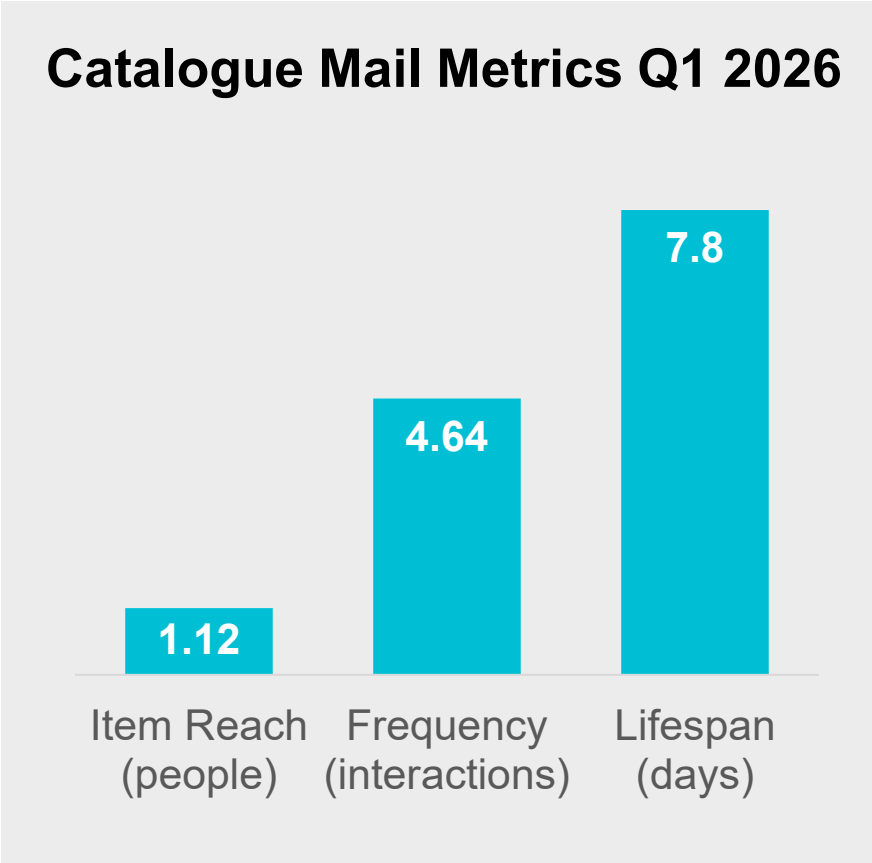


Partially Addressed Mail Attention (seconds interacted with per item)



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.



Source: Q1 2026 n=10,189 mail items (373 Catalogues)

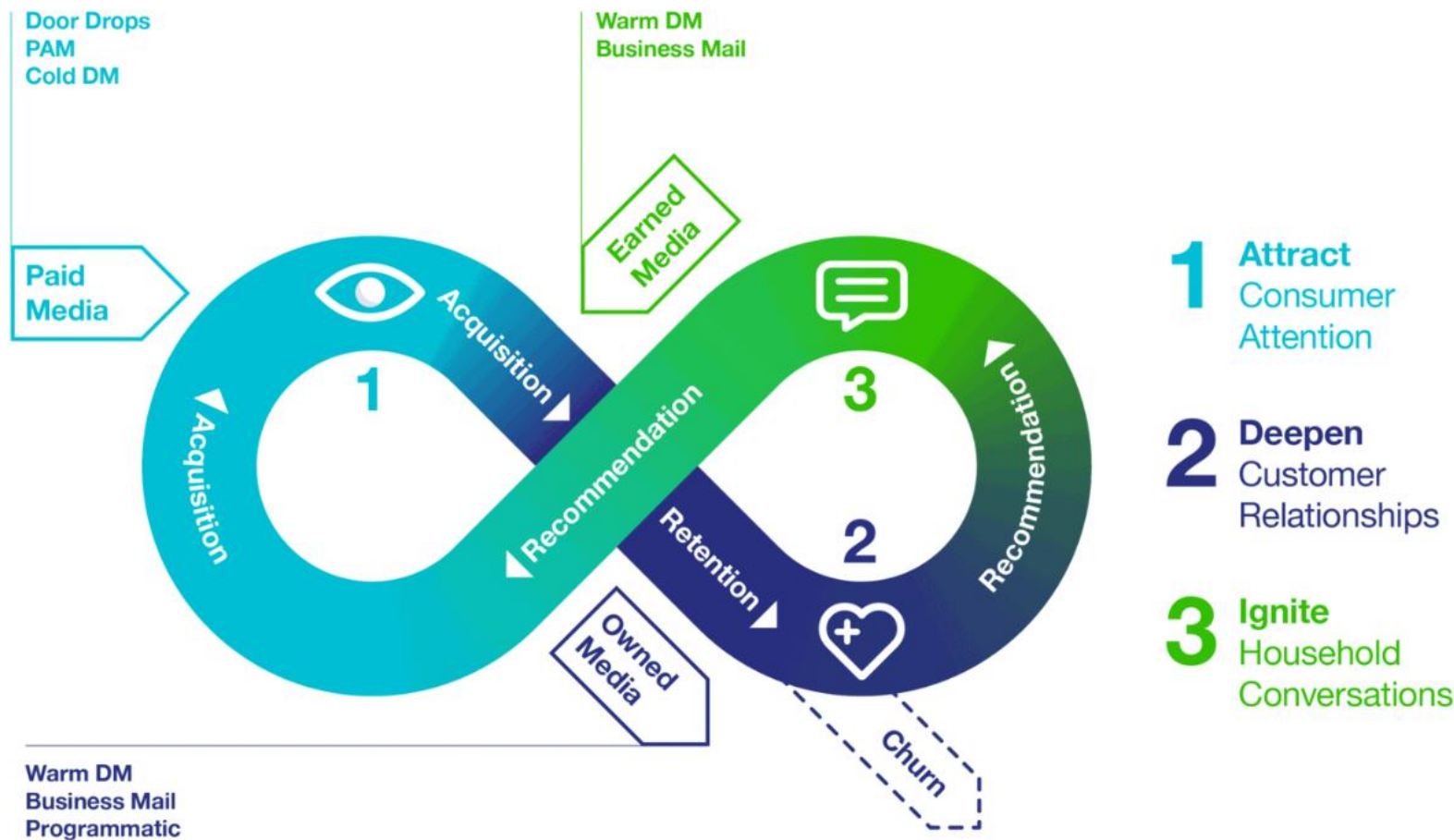
Mail Effectiveness Q1 2026

Mail's Super Touchpoint Strengths



Mail Media Metrics

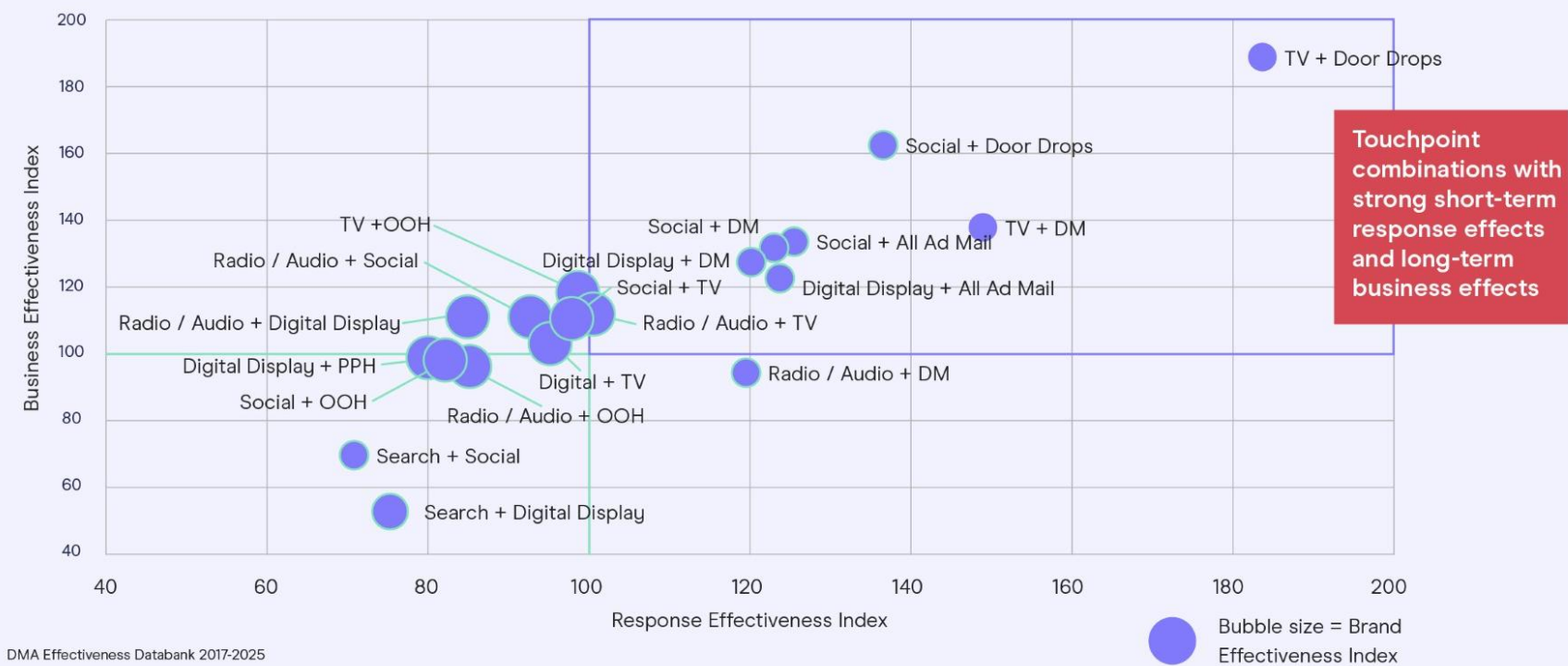
Mail drives acquisition, retention and recommendation



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

15

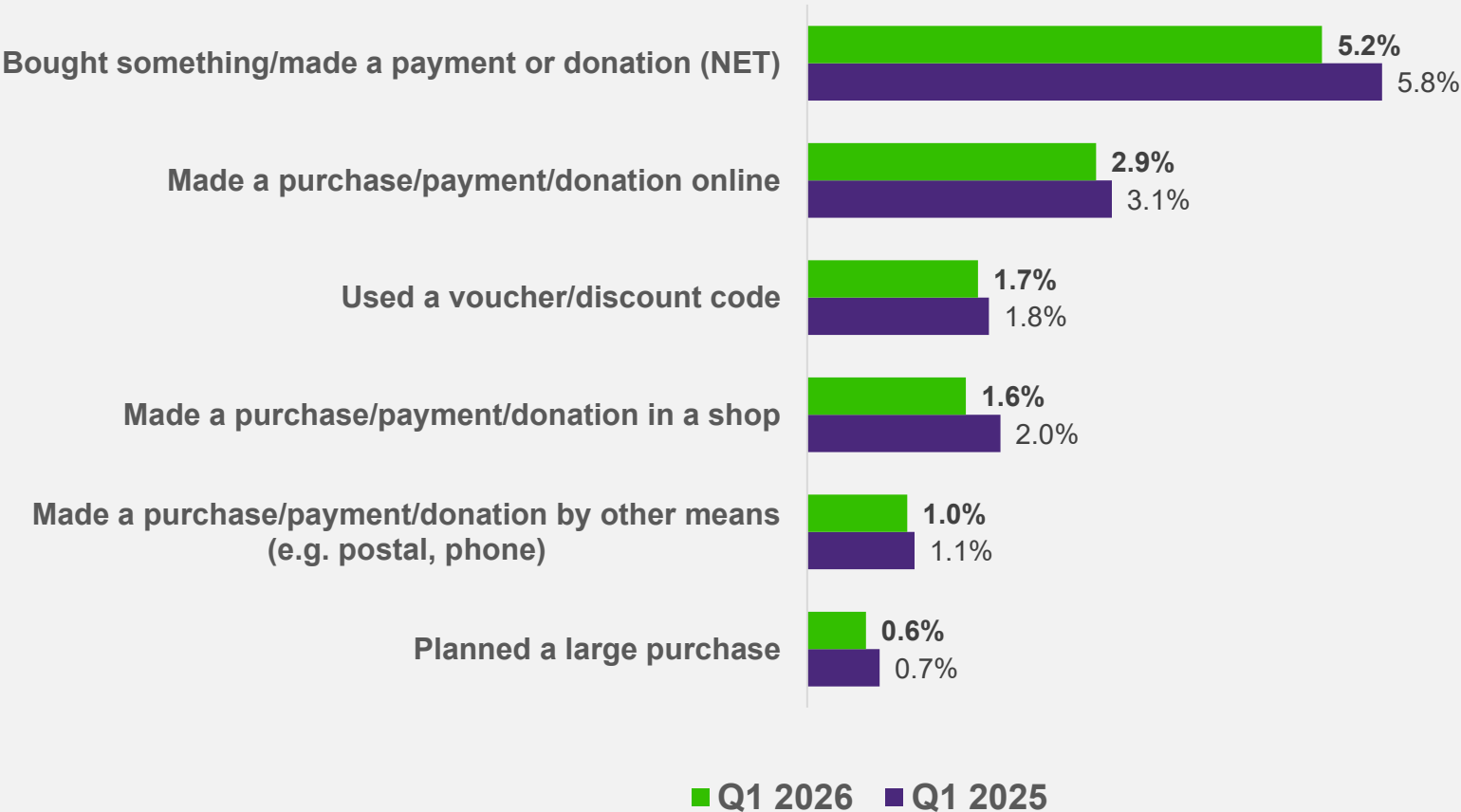
Response Effectiveness vs Business Effectiveness of Touchpoint Combinations



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



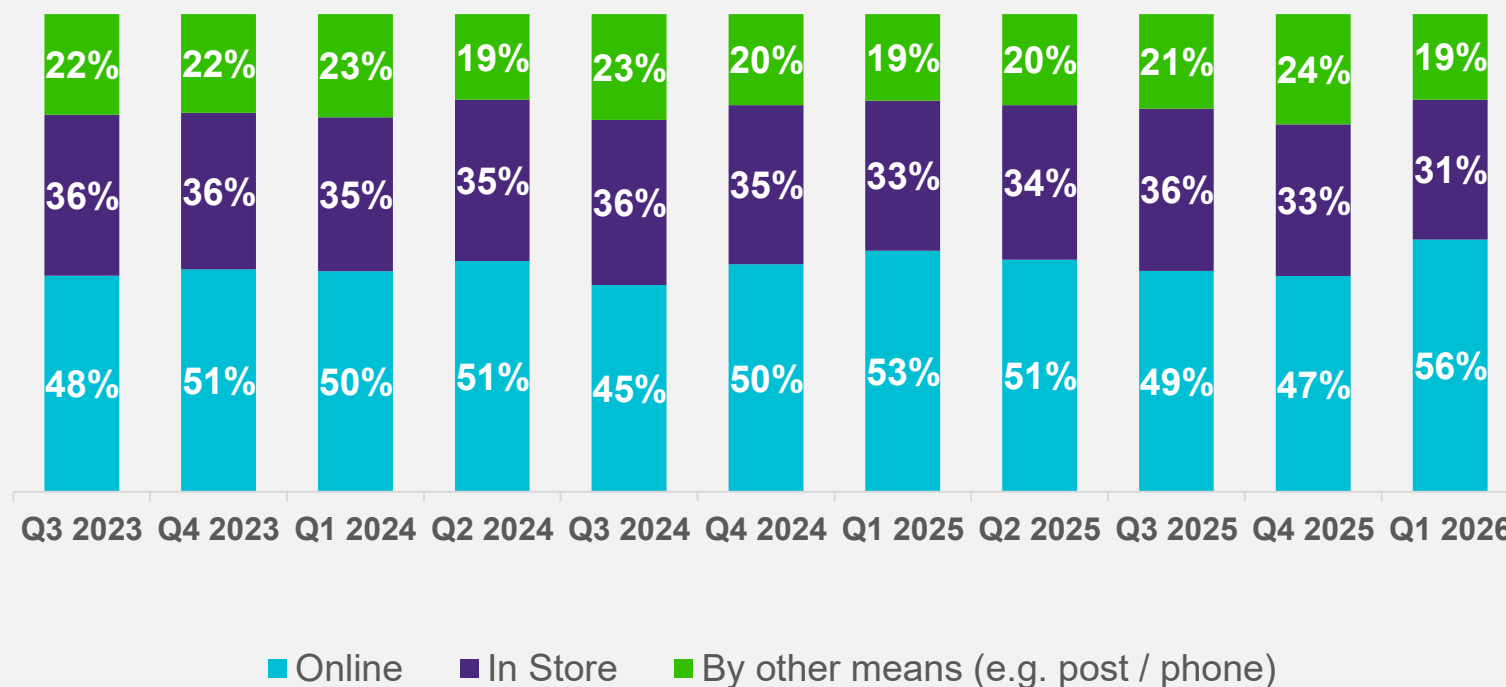
Source: JICMAIL Item Data Q1 2025 n=10,806 mail items; Q1 2026 n=10,109 mail items

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)



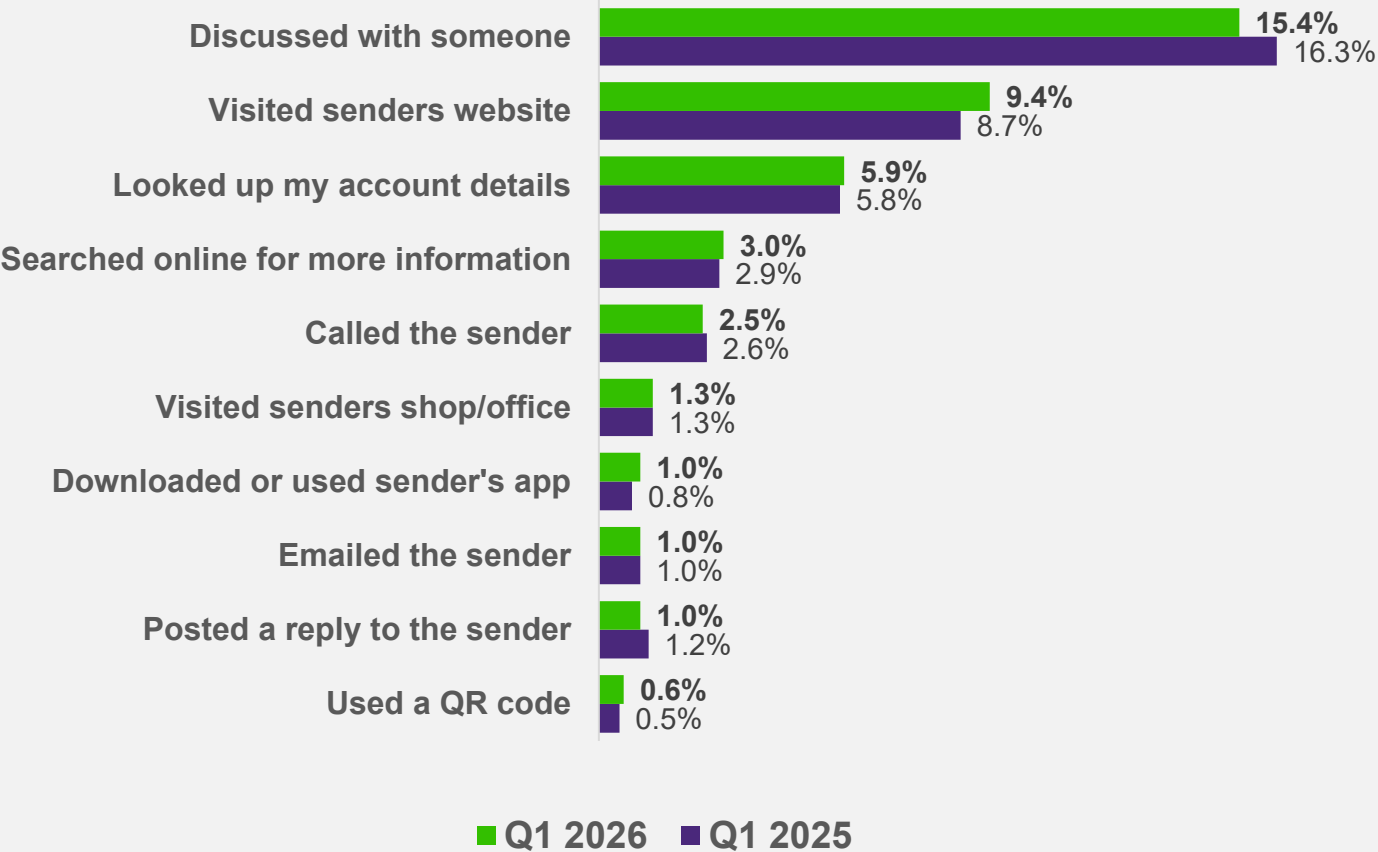
Mail Media Metrics

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

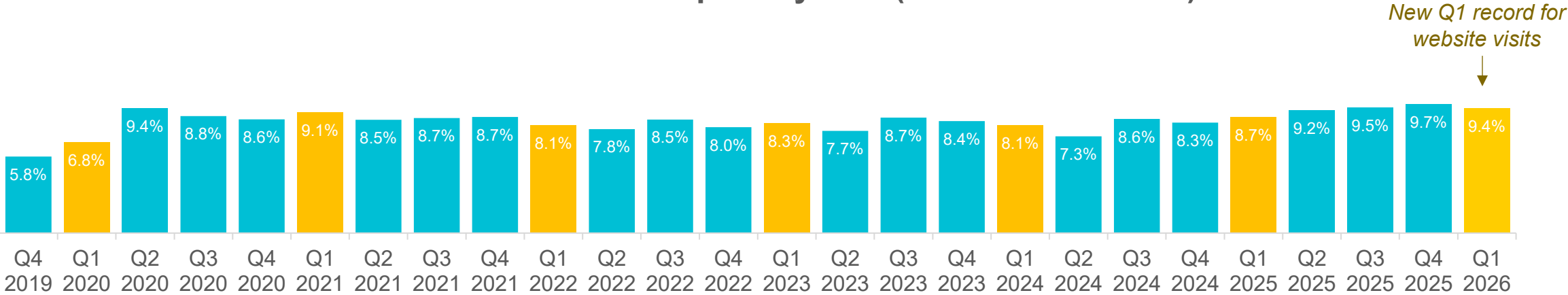
Customer Retention and Recommendation

Commercial Actions (All Mail Types) % of mail items



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

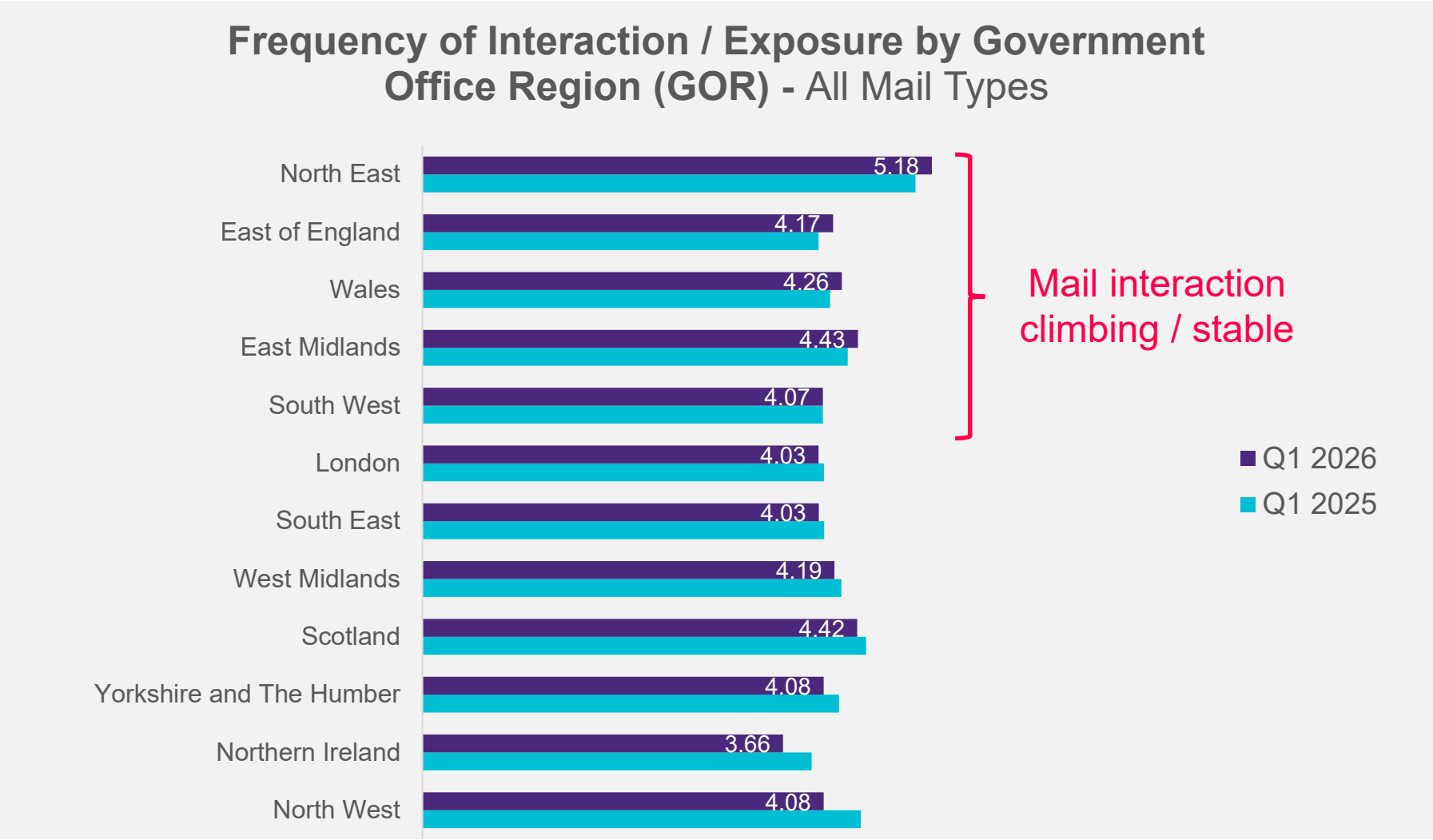
Website Visits Prompted by Mail (% of all mail items)



Mail Audiences Q1 2026

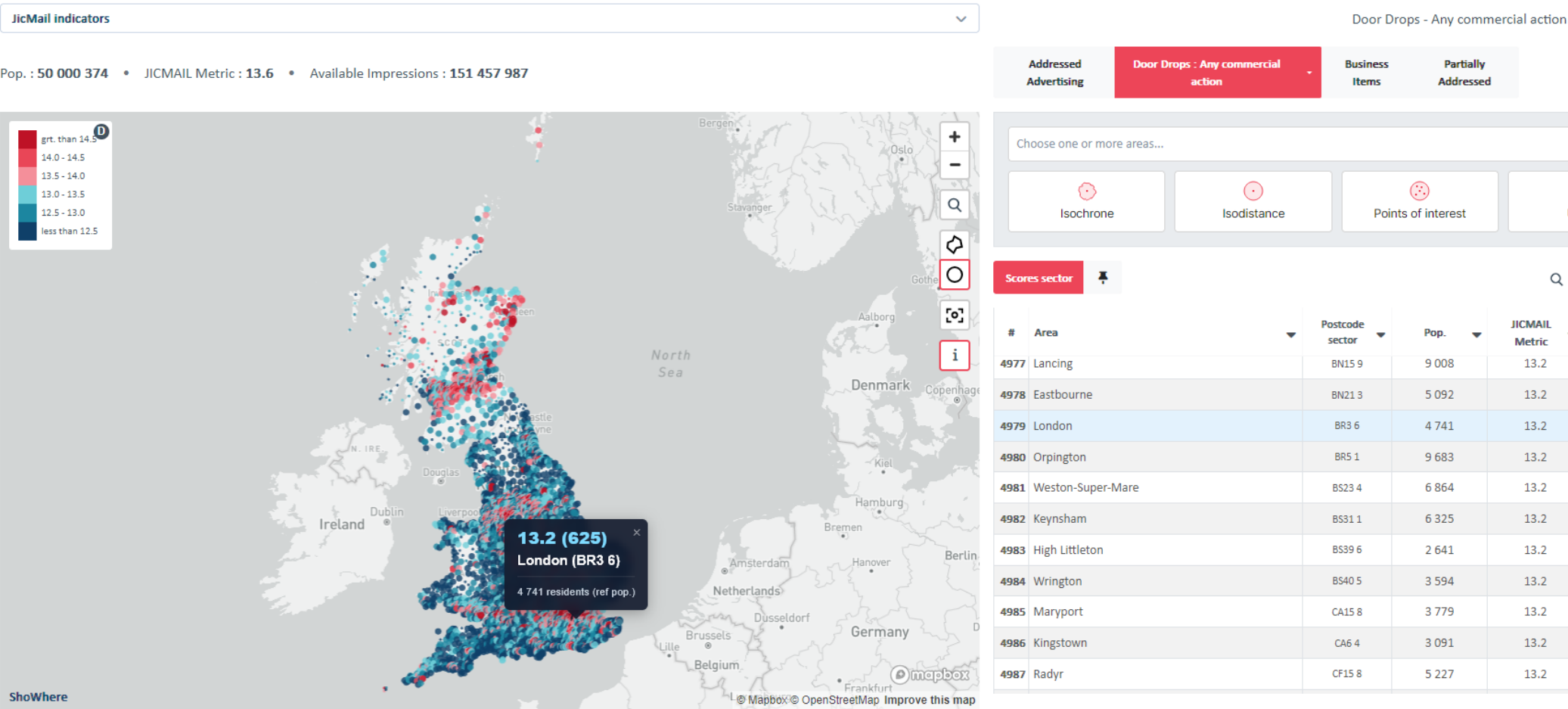
The New JICMAIL Geo Planning Tool

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



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

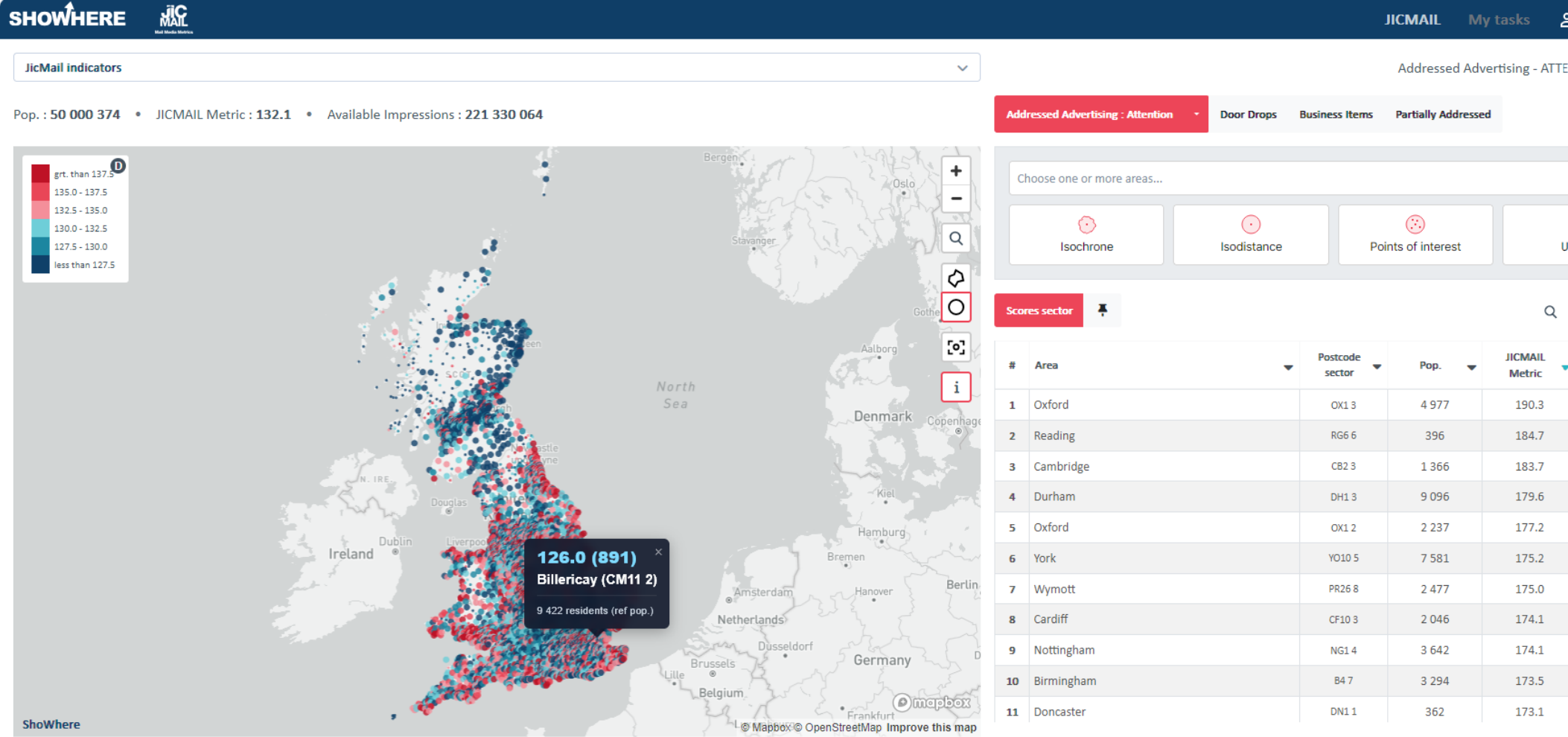
For example, the heat map points towards Door Drop commercial effectiveness (the % of Door Drops driving any commercial outcome) being highest in London and other built-up areas.



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

23

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



Mail Response: Full Year 2025

The Response Rate Tracker

What the Response Rate Tracker is used for

25



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



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

1. ANONYMOUS
ADVERTISER DETAILS

Industry Sector	Product Level
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2. MAIL DETAILS

Mail Type	B2B or B2C	Cold or Warm	Brand or Response
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3. CAMPAIGN DETAILS

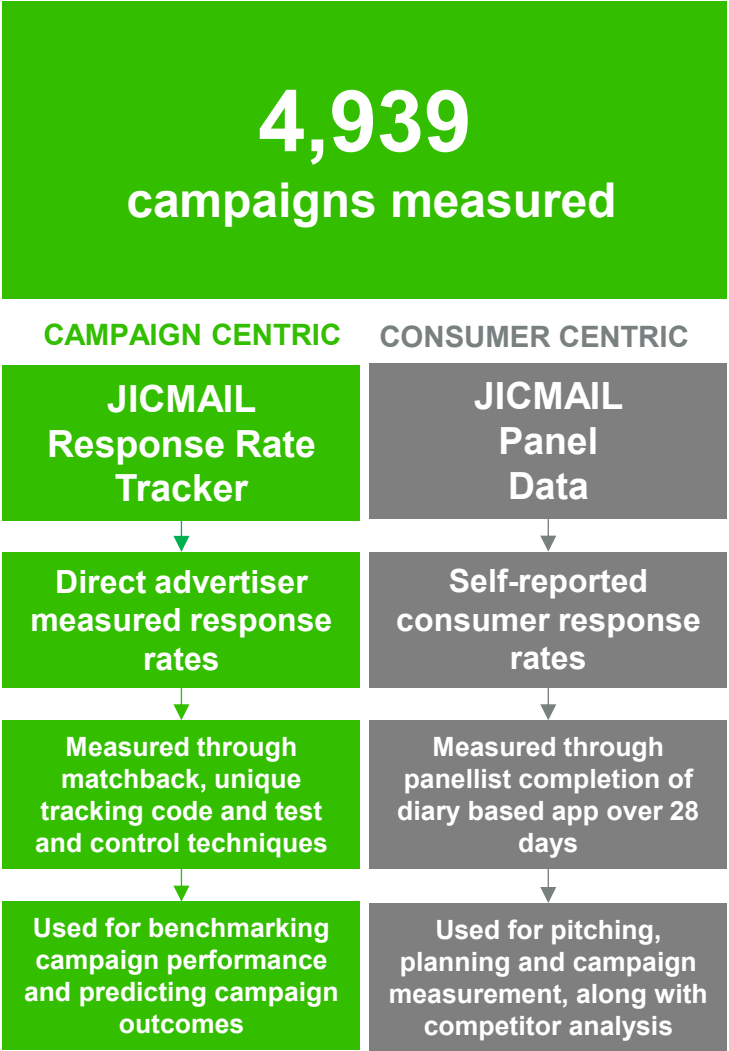
Start and End Date	Volumes	Burst / Repeat?	Budget
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4. RESPONSE DATA

Response Metric Measured	Response Rate	CPA and AOV*	ROI*
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* not reported for all campaigns

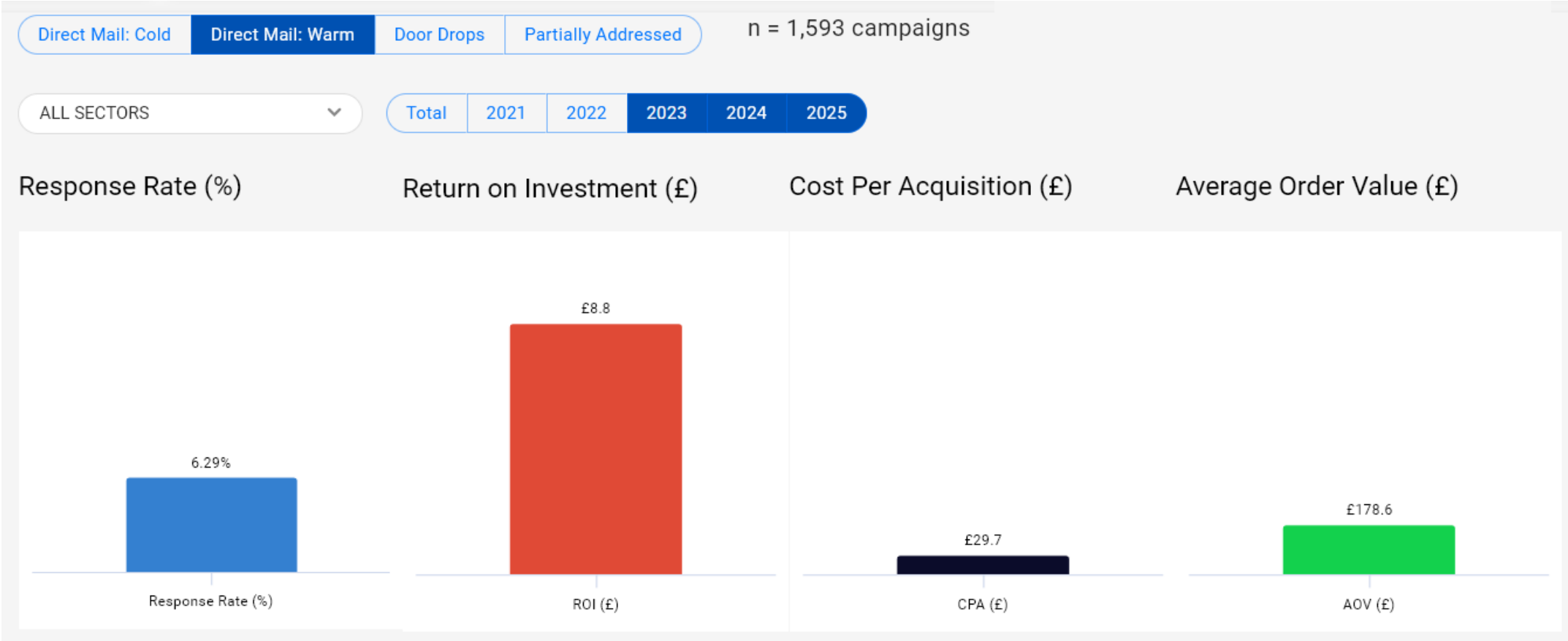
Campaign data vs JICMAIL panel data



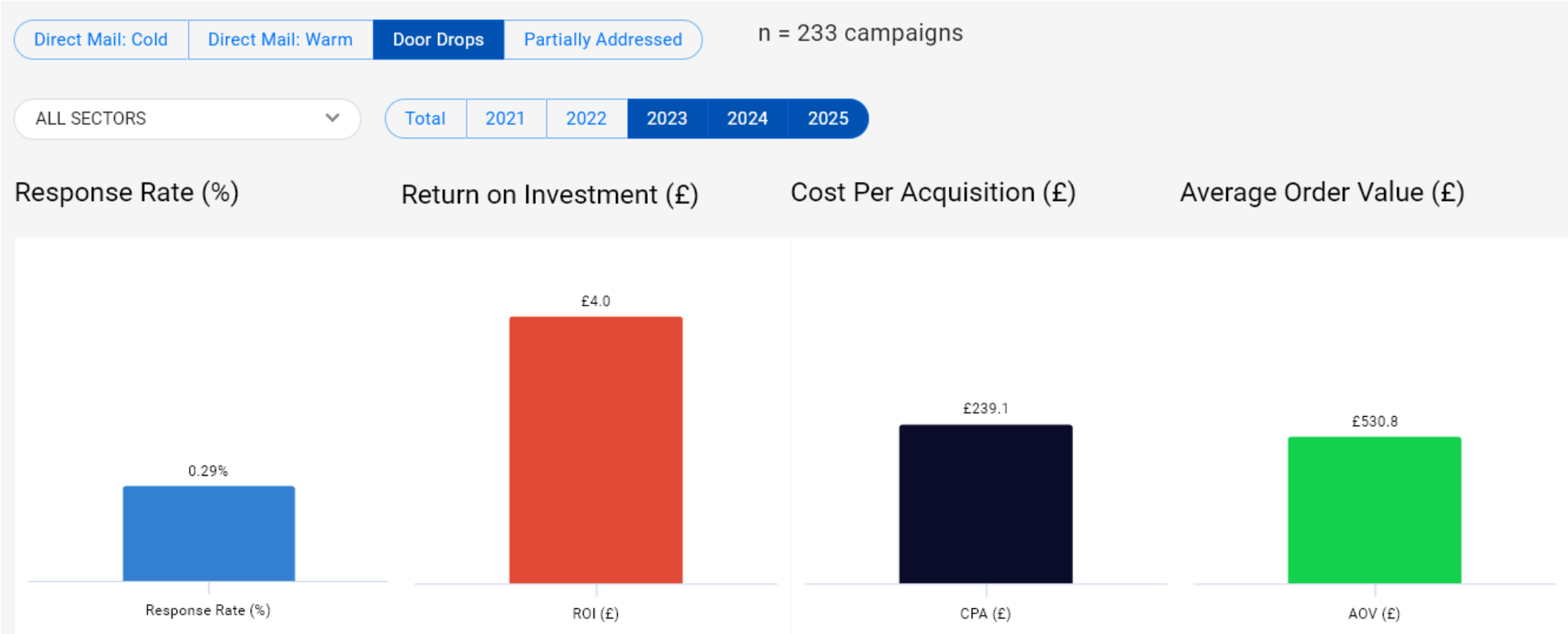
Cold Direct Mail: 1% Response Rate and ROI of £2.10



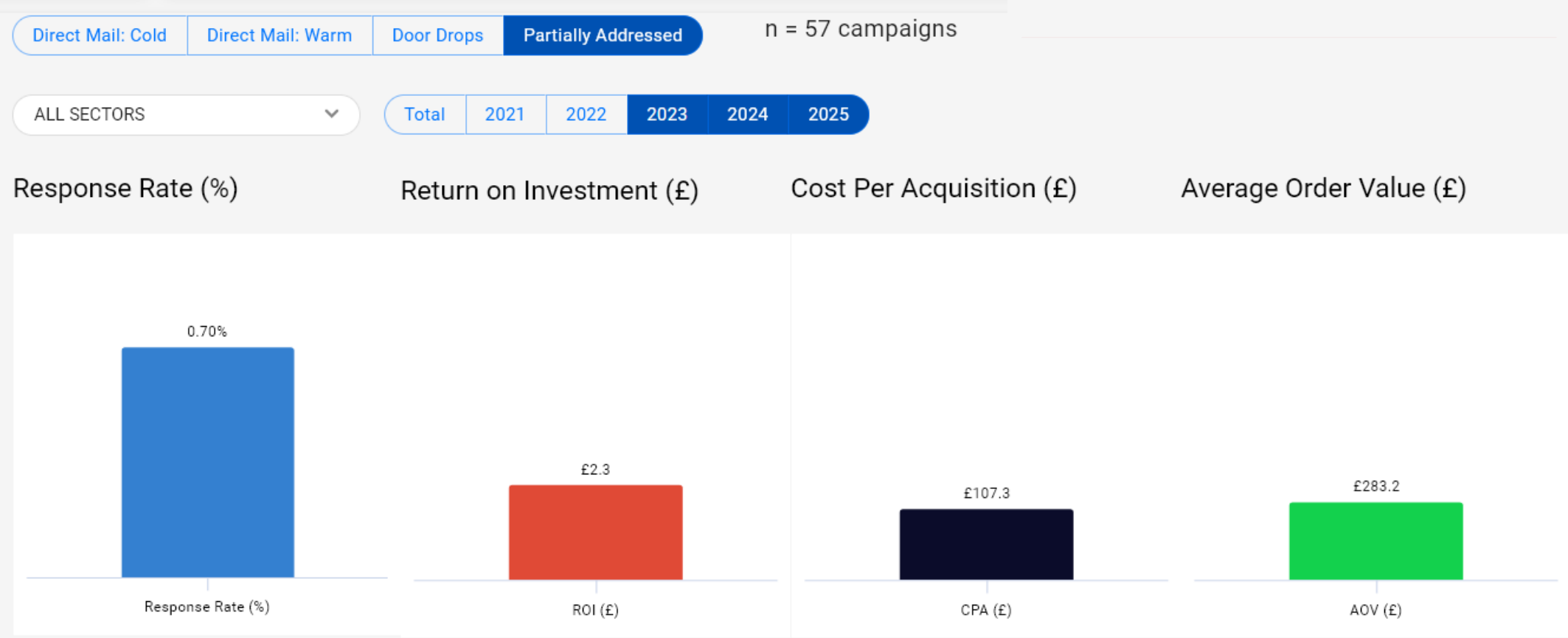
Warm DM: 6.3% Response Rate and ROI of £8.80



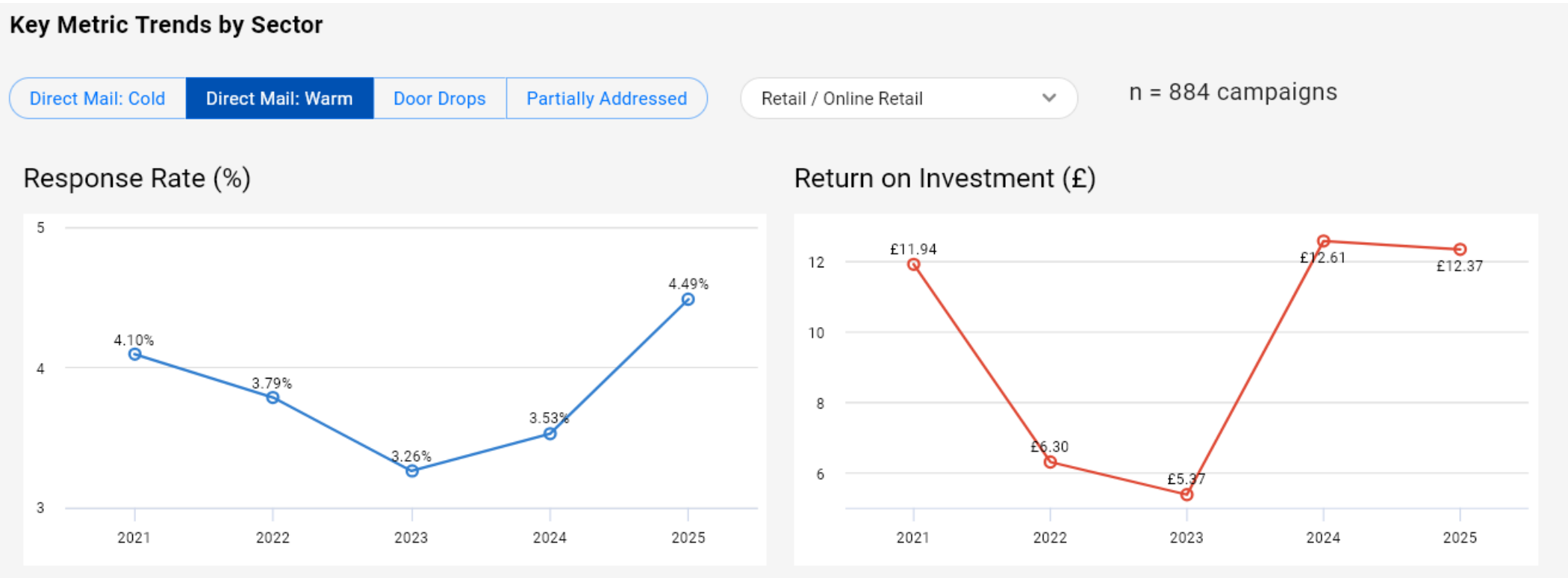
Door Drops: 0.3% Response and ROI of £4.0



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

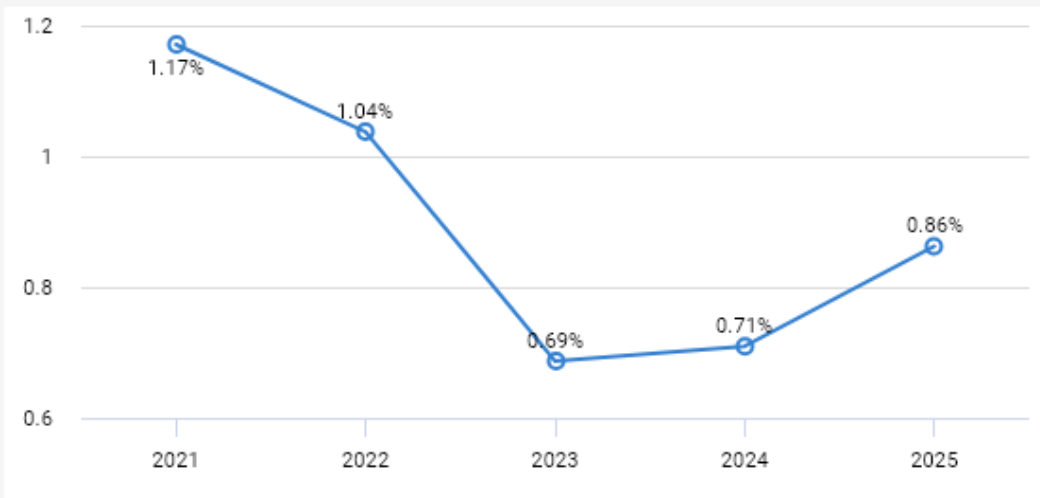


Response rates for Warm Direct Mail from Retailers have grown in 2025

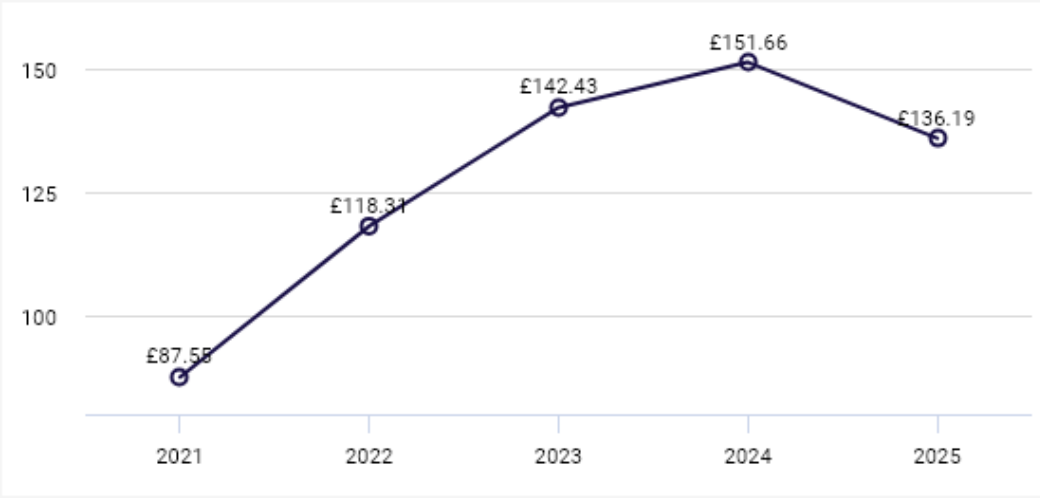


Response rates for Cold / Acquisition Direct Mail from Retailers has grown while cost per acquisition is down

Response Rate (%)



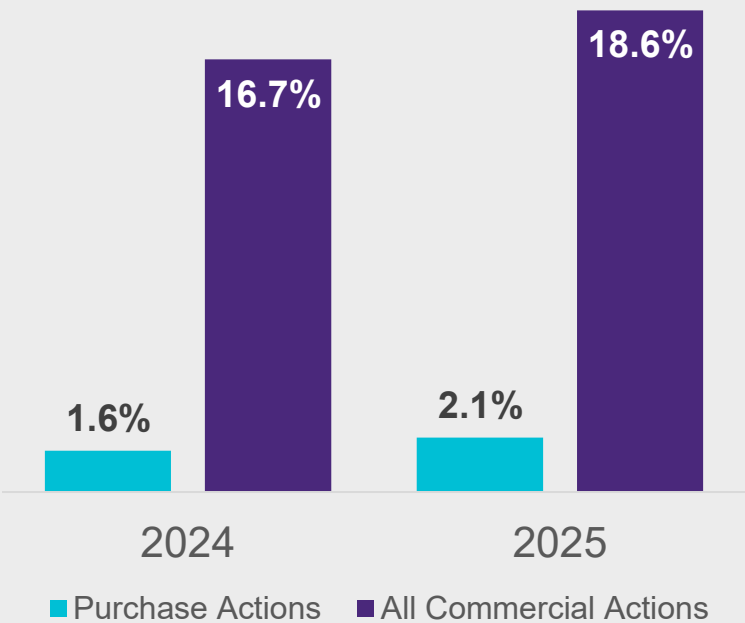
Cost Per Acquisition (£)



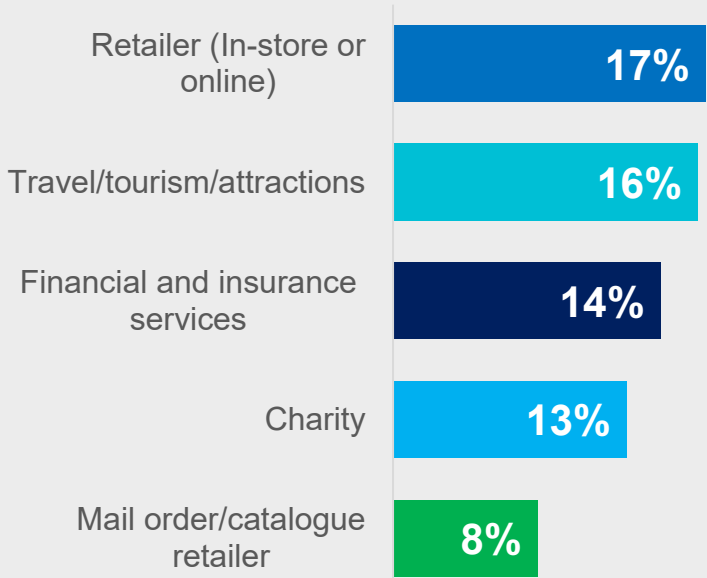
Growth in Cold DM Response mirrors JICMAIL panel trends

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.

Cold Direct Mail Response Data from JICMAIL Panel

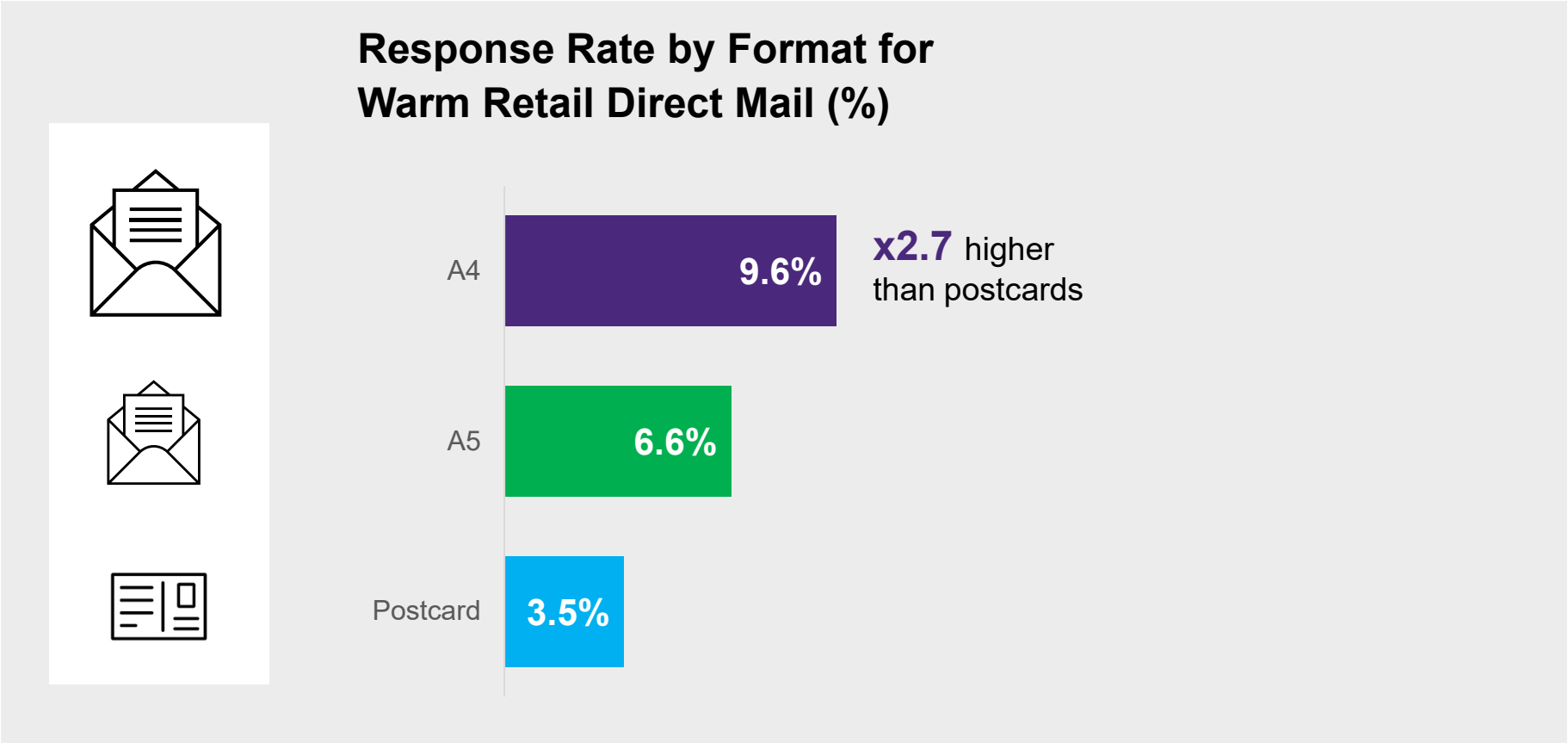


Top Five Sectors Share of Cold Direct Mail Panel Volumes 2025



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



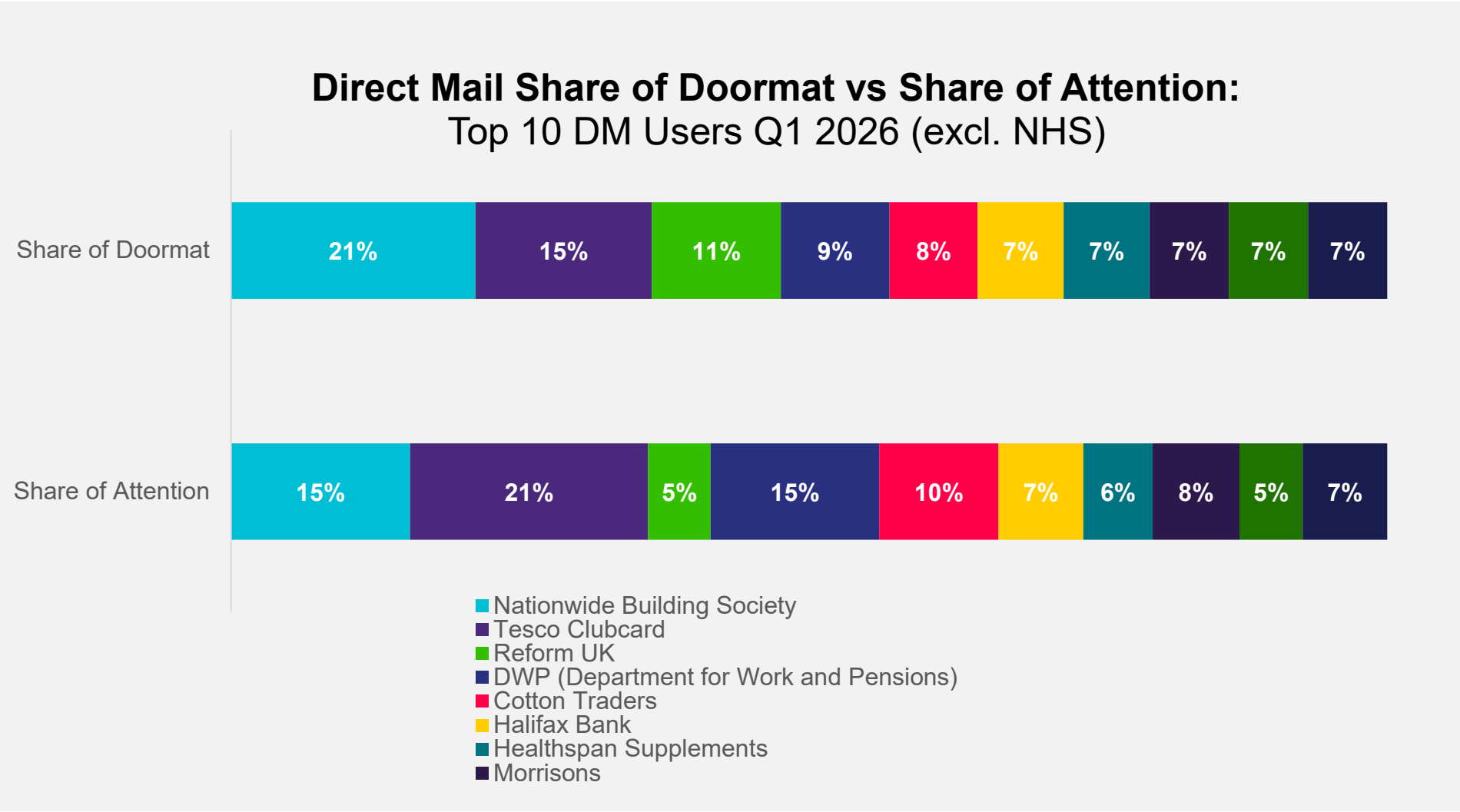
Advertiser Activity Q1 2026

Share of Doormat and Attention



Mail Media Metrics

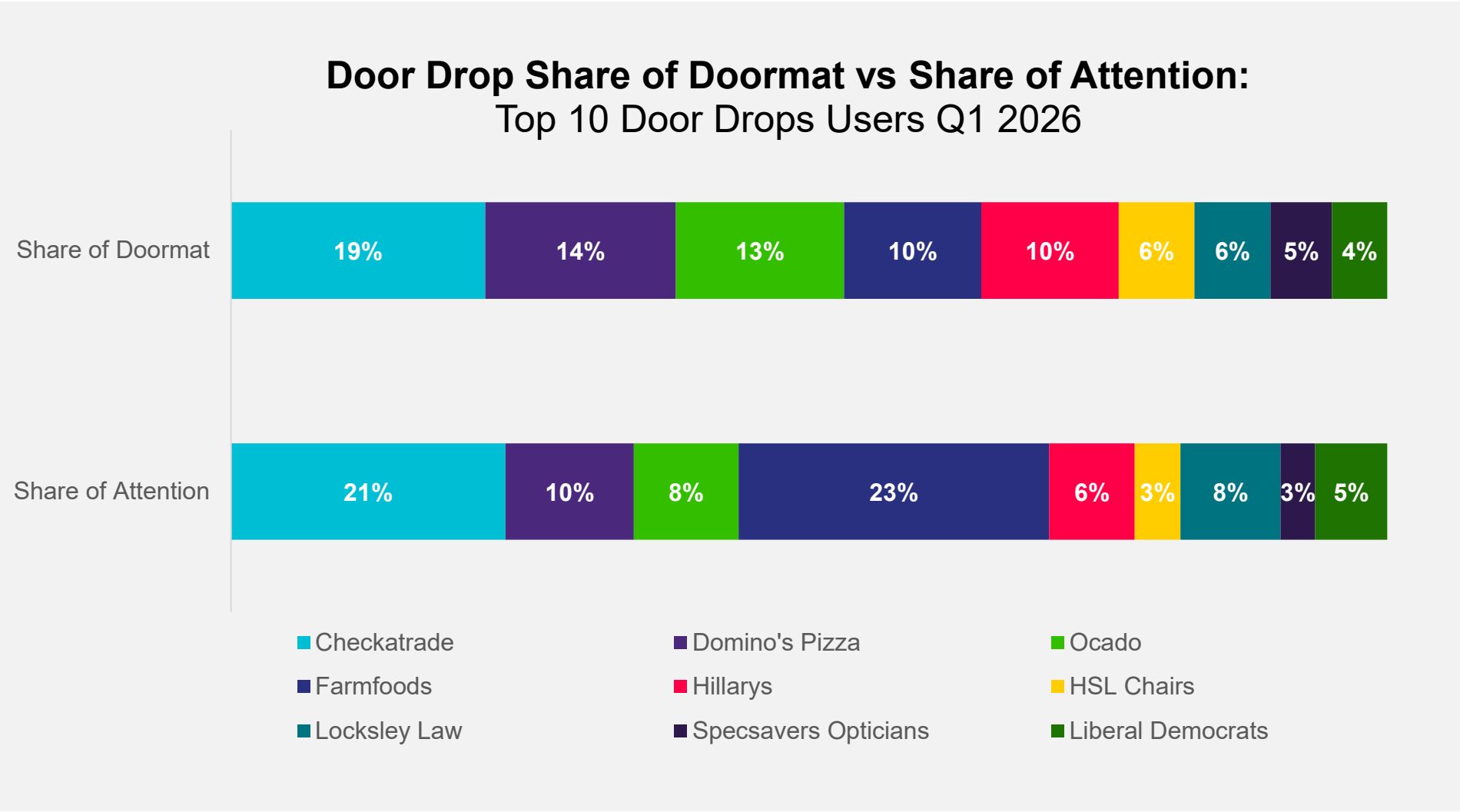
Tesco Clubcard continues to take a disproportionately high share of DM attention. Reform a disproportionately low show



Top performing DM creatives from Q1 2026



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

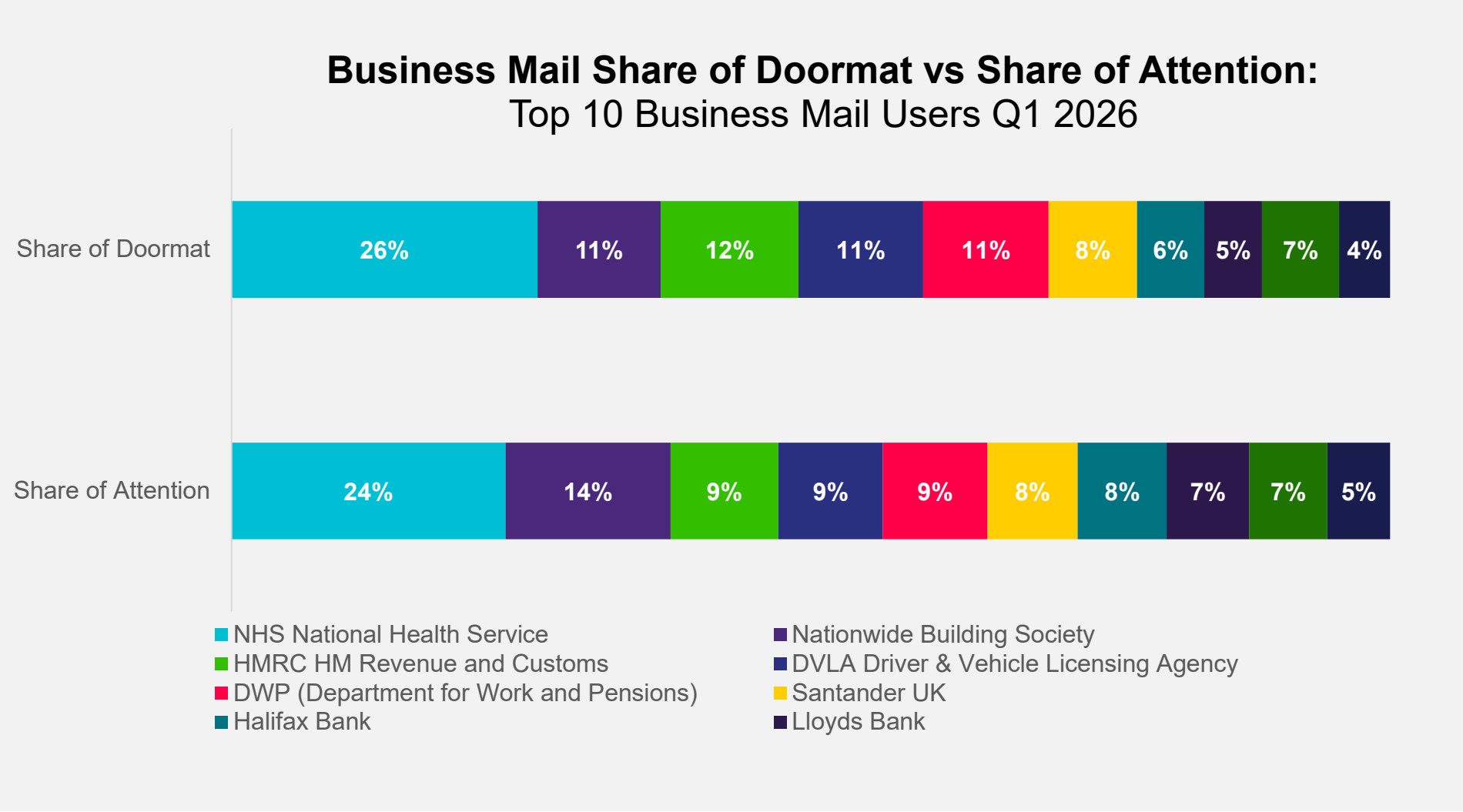


Top performing Door Drop creative from Q1 2026

41



Nationwide over-performing for share of Business Mail attention



Top performing Business Mail creative from Q1 2026

43



1.

Engagement & Effectiveness

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Thanks

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