

Door Drop Report 2022

In partnership with

**JIC
MAIL**

Mail Media Metrics

Intelligent Marketing

DM
Data &
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Association **A**

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/ Introduction

Welcome to the new look and freshly renamed report from the DMA and JICMAIL into the state of door drops and their position in the wider marketing mix. This is now the 28th year the DMA has produced annual figures on the door drop industry, but also marks the first time these have been integrated with the unique insights JICMAIL has to offer.

The figures collated for this year's report are from January to December 2021, representing a snapshot of how the door drop industry performed last year and comparing it back over the last 5 years and beyond. The partnership with JICMAIL also enables us to merge the DMA's industry data with its industry-standard audience measurement for the first time. The result is a new structure and even more insights, offering the most accurate and detailed picture of the UK door drop market available.

This report covers a period nobody could have foreseen, with coronavirus changing how everyone lived, worked, shopped and played since 2020. However, the figures contained within this report also show the key role door drops have played in engaging and informing consumers during these challenging times.

While there has been a healthy return to volume growth in the market in 2021, lower than average ad spend growth means that door drops have lost share in overall media budgets. This may be down to a lag in media spend on door drops while many physical stores and premises were unable to fully re-open due to restrictions in the first half of 2020. This is also, however, a key opportunity for advertisers that are willing to seize it too. Brands that move first to ramp up door drop activity while their competitors are less active in this space, these are the businesses that will enjoy a higher share of doormat and greater visibility in consumer's homes. It's these brands that will also benefit from the engagement and effectiveness the channel can offer both in the short and long-term too.

What all of this means precisely for 2022 and beyond, we will have to wait and see. But whether it's engaging new customers or fostering loyalty in existing ones, door drops offer both an effective and scalable opportunity for brands.

Finally, this report and these findings would not be possible without the support of both the members of the **DMA Print Council's Door Drop Hub** and, of course, the organisations that take the time to collate and share their figures with us each year. I'd like to thank the teams at **Dor-2-Dor, LDM UK, Letterbox Distribution, Newsquest Direct, Royal Mail, The Letterbox Consultancy** and **Whistl** for their continued support for this project.

Tim Bond

Director of Content Strategy & Insight at Data & Marketing Association

Ian Gibbs

Director of Data Leadership and Learning at JICMAIL

/ Foreword – Print Council's Door Drop Hub

We're delighted that this report shows the significant growth in volumes that many of us expected; with the door drop channel recovering and volumes heading back towards where we might expect them to be.

Casting our minds back to early 2021, the UK was experiencing another Covid wave and significant lockdown restrictions were in place across most areas.

Announcements from the government in December 2020 had forced the closure of many consumer facing businesses and travel was severely restricted.

As the year went on and with the vaccine program rolled out, we saw the opening of most industries across the year, though some were more restricted than others.

This report reflects that story; showing a difficult start to the year but recovering quickly and strongly as the year went on, across all sectors and age groups.

This has resulted in an annual volume that is significantly higher than 2020 and most encouragingly, a final quarter of 2021 that shows a higher performance than the equivalent period over the past five years, except for 2019.

It is also pleasing to see that the recovery of door drop volumes is one of the strongest across the media landscape, and the strongest of all print media.

Most regular users have returned to the channel, albeit not yet at the volumes pre-covid, and added to new clients that used the channel throughout Covid, the signs are promising that we are seeing genuine growth in the number of users as we begin 2022, as well as existing users returning to pre-covid spend.

As the introduction states, we are now enjoying the introduction of additional JICMAIL data to this report, which will give us greater detail about the contributing factors behind these annual volumes.

One of the most interesting takeaways from this has been the changing audience of those receiving door drop items, with younger age ranges being targeted far more than in recent years.

Some of this will be due to a reduced set of media options during Covid lockdowns, but with home working far more prevalent now and seemingly here to stay, perhaps brands are realising that they can reach these audiences effectively and efficiently with an engaging media option that will stand out from digital media.

As we look ahead to 2022, we know that there are a number of challenges facing UK businesses.

The aftereffects of Covid lockdowns added to the cost of living issues in the UK will have an impact on both spend and response for many, although as a channel we sometimes see clients moving above the line spend into door drop to give more affordable reach at scale, which offsets effects against smaller users.

We must also be aware of how increasing paper costs will affect client volumes and we may see a greater increase in spend compared against volumes if this continues. However, many users are seeing this as an opportunity to review formats and item specifications, and making tweaks that enable them to maintain or grow their volumes.

With volumes on the rise and new clients in the channel, as well as greater insights that can be leveraged to further improve media performance, there is much to feel optimistic about and we look forward to seeing what the year brings.

DMA Print Council's Door Drop Hub

/ Acknowledgements

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

- Neal Dodd, The Letterbox Consultancy (Chair)
- Christian Petersen, Royal Mail Group
- Jayne Raynsford, Whistl
- Nick Brown, Newsquest
- Patrick Bennett, The Specialist Works
- Peter Whittall, PSE Offline Marketing
- Rob Henry, LDM

/ Exec Summary

Each year, this report provides the most accurate estimate available of the volume and value of the door drop market in the UK. This edition's figures explore the 2021 calendar year and also include trended data from previous years.

For the first time is also contains in-depth analysis from JICMAIL's industry-standard audience measurement data. Combining to offer insights into door drops at both a household and industry level. Key findings from this year's research include:

Household

- The DMA's figures show that the number of items homes received in 2021 returned to some form of post-pandemic normality, increasing to almost 2.5 door drops received per household per week.
- Door drops volumes on JICMAIL's nationally representative panel were up 33% year-on-year in 2021, the fastest growth rate of all three key mail channels (also including direct mail and business mail).
- With above average growth rates, door drop share of the total mail market has strengthened: up from 20% share in 2020 to 23% in 2021, growth has been driven by a number of key advertiser sectors.
- As of Q4 2021, 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 the UK interacts with the average door drop 3.1 times a month.
- Together these calculations allow us to quantify the numbers of eyeballs on ads while quantifying the numbers of impressions generated by a campaign (for example, 1 million door drops will reach 1.05 million people, each interacting with the average door drop 3.1 times a month, resulting in 3.3 million impacts or impressions being generated). Door drops therefore have a significant contribution to above-the-line planning KPIs.
- Pre-conceptions around the types of audiences that are most engaged with door drops have been turned on their head over the course of the last few years. Upmarket ABC1 audiences now interact with the average door drop more than those the in C2DE social grade. Similarly, the under 35s now interact with door drops more than any other age group, opening up a world of new prospecting opportunities with the channel.

Industry

- In 2021, both spend on door drops and the volume sent increased following a pandemic impacted 2020. Spend increased by 15.5% year-on-year to £182m, while volumes increased by 14.3% to just over 3.5bn units.
- Leaflets continued to be the majority of the door drops sent in 2021 (86.7%), with both envelopes and booklets reducing slightly year-on-year (to 7.3% and 6.0% respectively). The result of these shifts is an overall minor decrease in the average weight of each item to 20.64g.
- The total weight of material that door drops account for has also continued to reduce long term, despite a year-on-year increase to 73,043 metric tonnes.
- Key drivers of market growth have included Restaurant/takeaway and Local tradesperson

advertisers who have recorded modest double-digit growth in the 20-30% range, while a handful of smaller volume categories have experienced an almost doubling of volumes (e.g., Mail order/Online retail, Travel, Letting/Estate agents, and Telecoms), as confidence has returned to the market.

- In terms of effectiveness, 4% of door drops resulted in some sort of purchase related outcome in 2021. Door drops generate effects throughout the customer journey however and once a broader range of effects are taken into account (such as digital traffic and brand discussions), an 11% effectiveness rate is evidence.
- Door drops are a prime example of how offline media can drive online effects, with the proportion of door drops driving web visits growing 50% year-on-year.
- Looking back over the DMA's historic figures, 2021 show signs of positive recovery and that the long-term trend has returned to a steadier (and potentially positive) footing already post-pandemic.
- According to the Advertising Association/WARC Expenditure Report figures for 2021, there's been an overall 34.4% increase in ad spend. Comparing door drops to other media channels, particularly Direct mail and Magazines and News, similar year-on-year growth can be seen (15-20%), returning them towards their 2019 levels – if not there yet.

/ Household

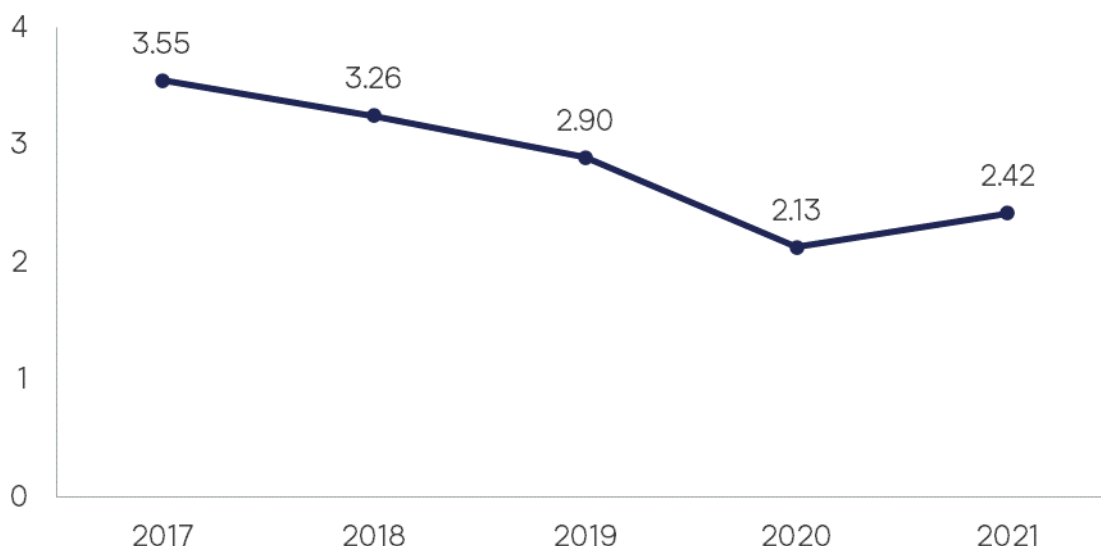
In this section, we will focus on those people receiving door drops, how many, what they're receiving and how they're engaging with the medium. Insights come from both the DMA's annual industry data and JICMAIL's consumer panel.

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.

Following the significant change in volume of mail sent in 2020, there was a marked reduction in the door drops per household too. As things have returned to some form of normality in 2021, this has meant an increase to almost 2.5 door drops received per household per week.

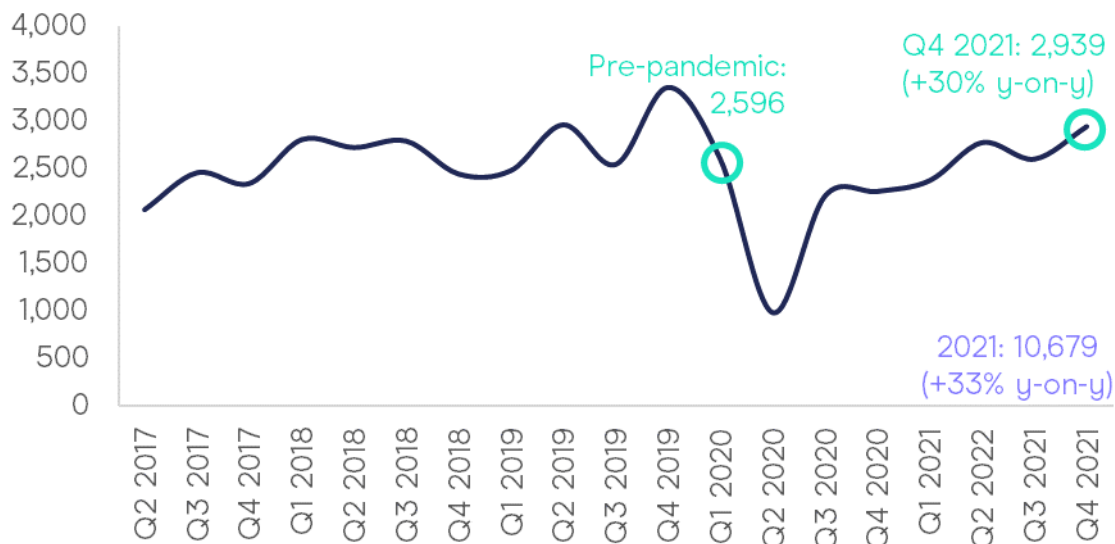
Door drops received (units per household per week)



Through the industry leading mail measurement system JICMAIL, and in-lieu of census level data on mail circulation, it is possible to make data-driven observations on 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 nationally representative nature of the panel means that panel volume trends should mirror the overall picture of national circulation.

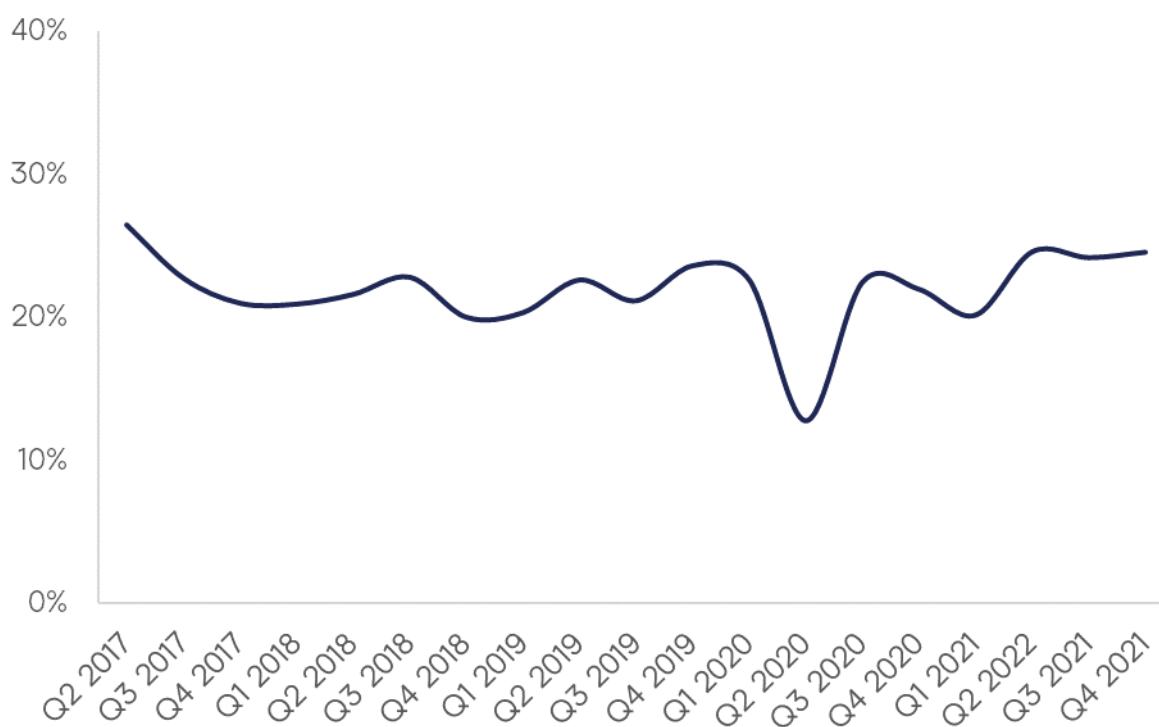
Door drop volumes have continued to climb throughout 2021 as the industry put the pandemic-induced ad-recession of Spring 2020 behind it. By the end of the year door drop sample sizes on the JICMAIL panel were in excess of where they were in the last pre-pandemic data period of Q1 2020, reflecting a buoyant end to the year (2,939 door drops were picked up by panellists in Q4 2021 vs 2,596 in Q1 2020). Full-year numbers reveal that door drops volumes were up 33% year-on-year in 2021, the fastest growth rate of all three key mail channels (also including Direct Mail and Business Mail).

JICMAIL door drop volumes (Q2 2017 to Q4 2021)



Higher-than-market growth rates for door drops in 2021 have inevitably led to share gains in the mail channel. Door drops were the hardest hit mail channel in Spring 2020, with share of total mail volumes dropping by ten percentage points between Q1 and Q2 2020. With growth on an upward trajectory ever since however, door drop share of the total market has strengthened. Up from 20% share in 2020 to 23% in 2021, growth has been driven by a number of key advertiser sectors.

JICMAIL Door drop share of mail volumes (Q2 2017 to Q4 2021)

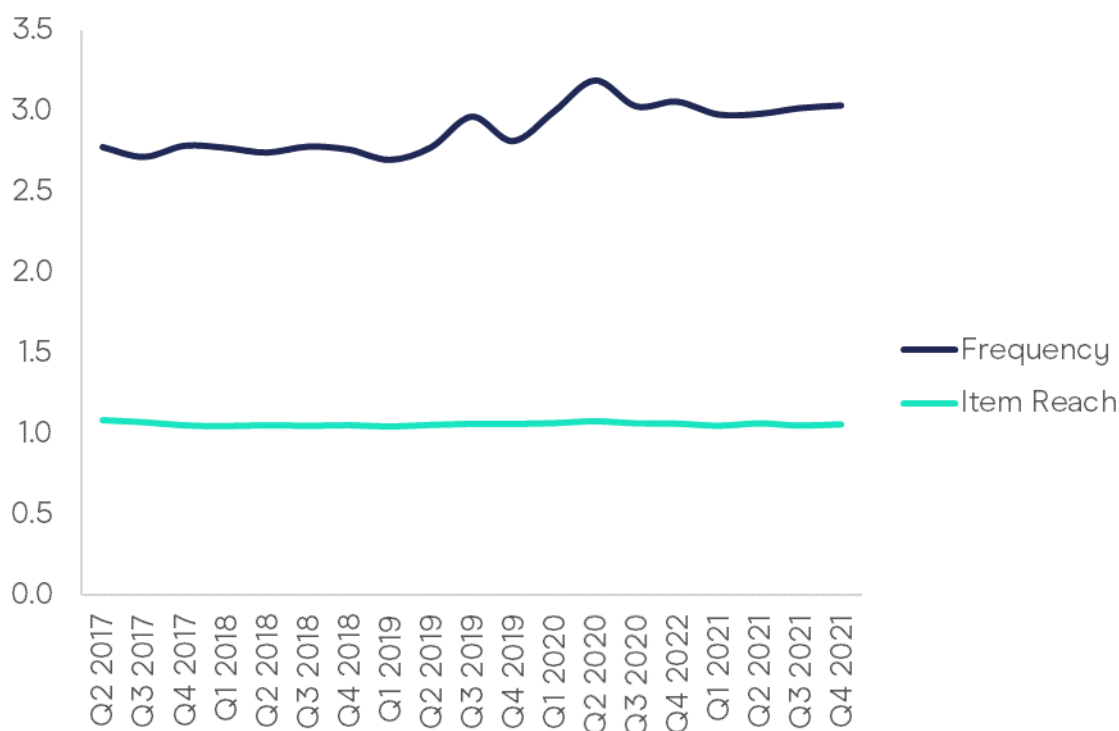


Engagement

To track consumer engagement with the mail channel not only gives the industry a benchmark against which credible and robust cases for the inclusion of door drops on the media plan can be made (the quality of consumer engagement is a position that every offline and online media channel has at some point tried to own over the last two decades); but more importantly it enables the industry to convert consumer action into media planning inputs and advertiser outcomes.

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. Each time a door drop is interacted with (e.g., each time it is read, looked or glanced at; put aside to look at later or put in the usual place amongst many other actions) 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 the planning of brand campaigns and in the door drops space allows the channel to be evaluated along the same lines as other channels on the media plan, while amplifying the role the mail channel has beyond delivering direct response KPIs (which will be covered in the next chapter).

Door drop item reach and frequency Q2 2017 to Q4 2021

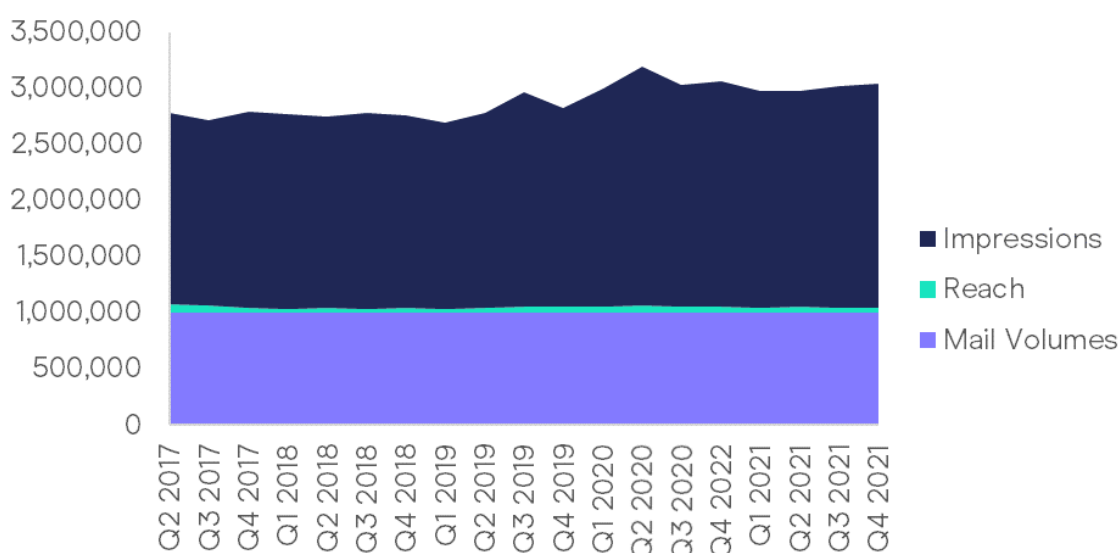


As of Q4 2021, the average door drop was shared with 1.05 people per household (a metric referred to as Item Reach), reflecting an additional 5% audience reach on top of campaign volumes. In addition, the average person the UK interacts with the average door drop 3.1 times a month. Together these calculations 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 interacting

with the average door drop 3.1 times each, results 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, gives a completely different perspective on the quantity of ad exposure advertisers are generating in-market by using door drops. With the pandemic prompting more people to stay at home, it gave door drops the opportunity to benefit from increased engagement levels in the home. In 2020 average door drop frequency increased to 3.0 from a figure of 2.8 a year earlier. This number has stayed stable in 2021 at 3.0 interactions a month: the efficiency gains (in terms of converting door drop items into impressions through increased consumer engagement) enjoyed by those advertisers who stayed active in the channel in the early pandemic, persisted in to 2021.

Door drop reach and impression delivery

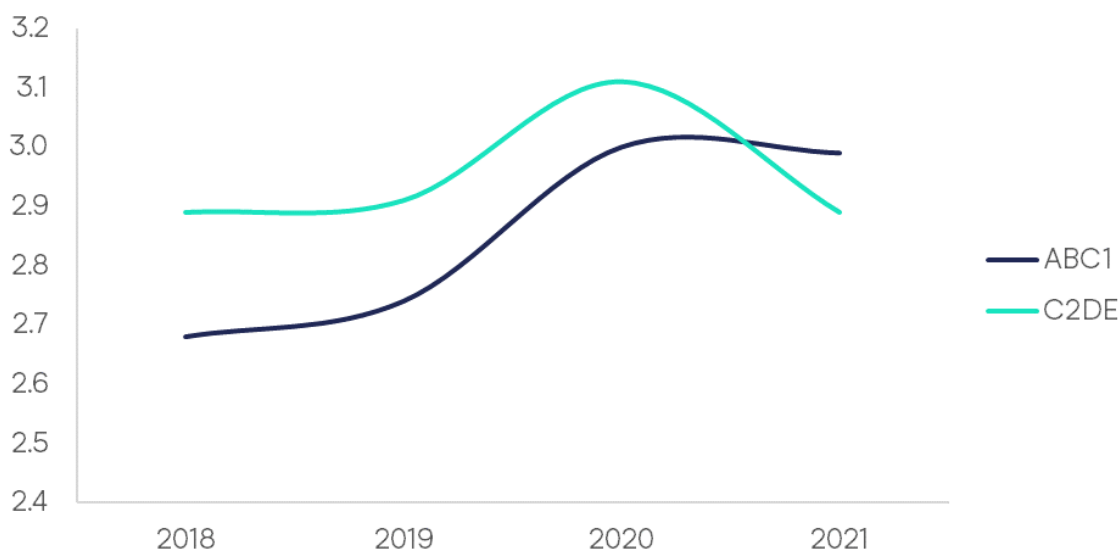


Frequency of Interaction by Audience

To understand where this increased efficiency has come from in the door drop channel, JICMAIL audience and household profile data can be interrogated, and at the same time provides an opportunity to consider future door drop-receptive audience targeting opportunities.

In terms of social grade, it has tended to be lower social grade audiences (generally audiences with lower skilled jobs) who are 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. As a means of engaging potentially higher income audiences, the channel has begun to build a credible case for its inclusion on the media plan.

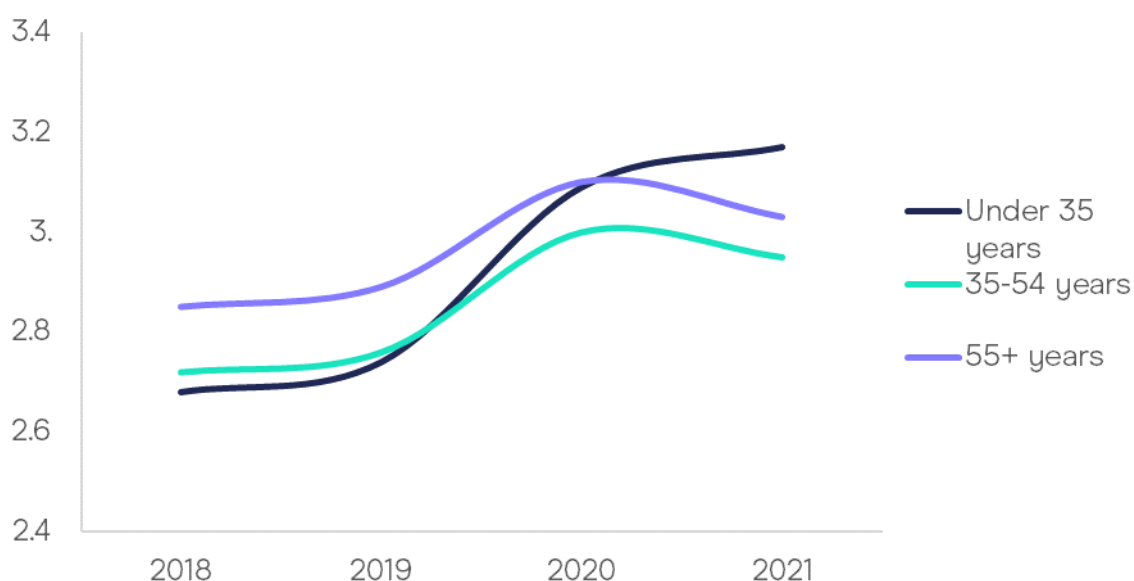
Door drop frequency by household social grade



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 35-54 year olds and 55+ year olds did. While all age groups have seen their door drop engagement increase since 2018, under 35 year olds have now overtaken the other two age cohorts and are 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.

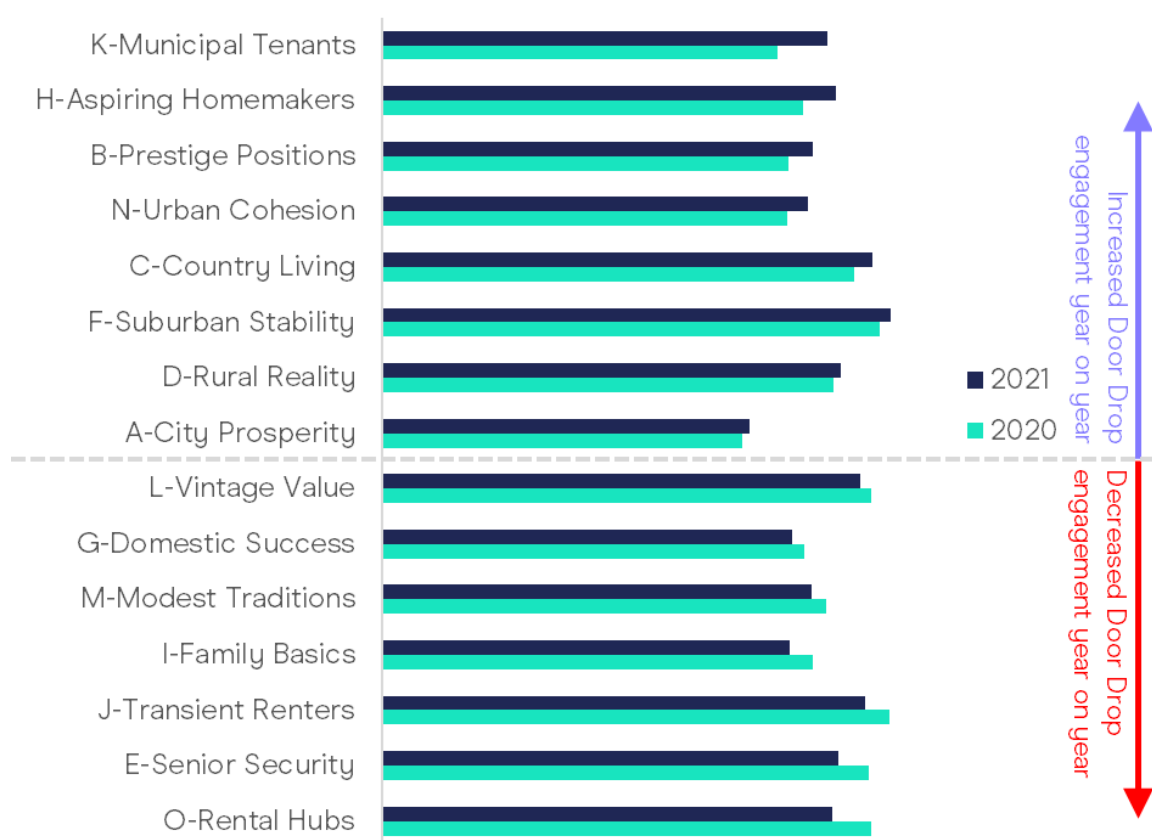
While young people under-index for mail exposure (i.e., they may be likely to engage with their mail but are under-targeted by advertisers), brands will likely achieve high cut-through and visibility on the doormats of younger households, further contributing to the efficiency of this channel in targeting 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 half of the main MOSAIC segments recorded an uplift in door drop engagement / interaction rates in 2021, while half reported a decline. A range of higher and lower incomes audiences drove the increase in engagement, with the Municipal Challenge, Aspiring Homemakers and Prestige Positions groups topping the year-on-year growth rankings. In line with the increased engagement that younger audiences are displaying with the channel, the two oldest segments – Vintage Value and Senior Security both reported declining frequency of interaction in 2021.

Door drop frequency by MOSAIC group



ACORN group door drop engagement also displayed a neatly symmetrical trend, with half of the groups experiencing increased interaction frequency and half experiencing decline. To highlight the differing engagement rates of audiences with the channel, is to highlight the need for robust campaign test and learn frameworks – frameworks which can be used to create content recommendations for different audiences and optimise campaign delivery towards those targets who are demonstrating the highest responsiveness.

Door drop frequency by ACORN group



/ 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 by a third amid the challenging market conditions brought about by the coronavirus, with volumes likewise dropping. In 2021, both spend and volume have increased by 15.5% and 14.3% respectively.

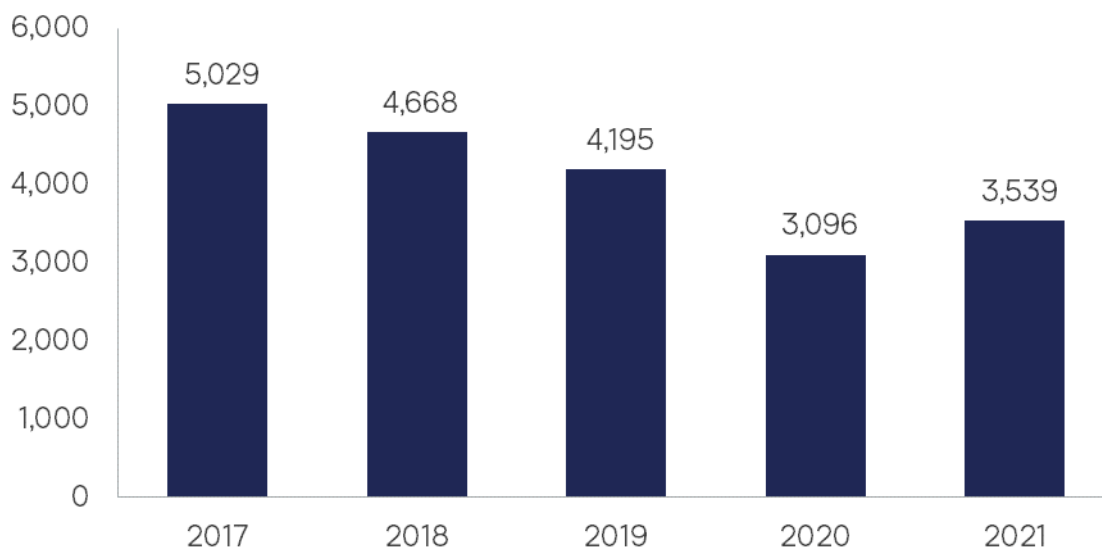
In a year that was still significantly impacted by the pandemic and significant challenges to 'business as usual' throughout the year, it's understandable that these figures have not fully returned to pre-pandemic levels. Throughout 2021 the continued uncertainty around economic outlook, possible restrictions and shifting behaviours may have made it hard for businesses to plan and utilise door drops (or mail more generally) as much as they may have previously. However, being more than 80% of the way back to 2019's measure is a strong sign of recovery.

Finally, another longer-term trend that has impacted door drop volumes is the rising cost of paper resulting in brands opting to send less – whether that's in terms of format, weight, or volume. But even here 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)



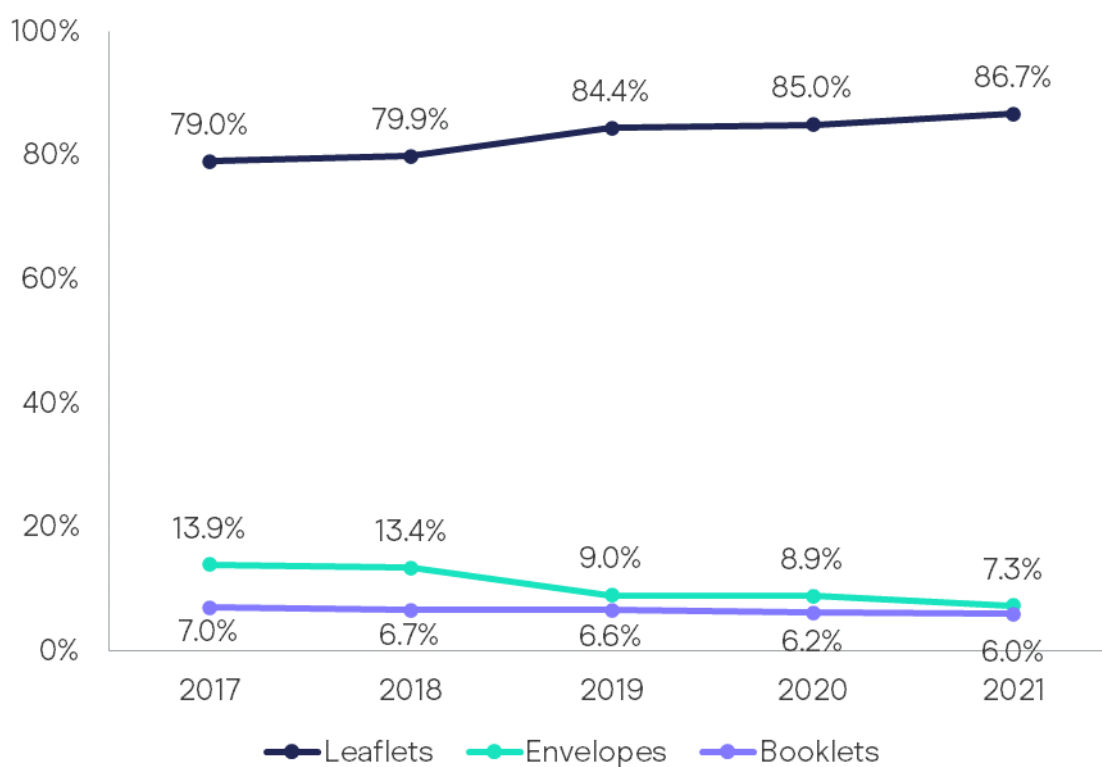
Yearly volumes (millions of units)



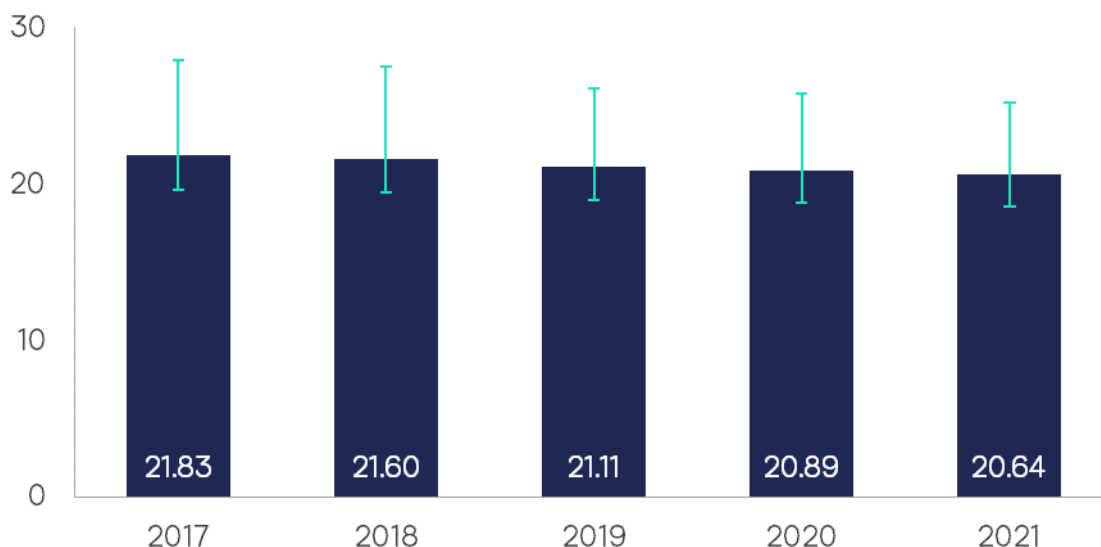
Total Material

The majority of the door drops sent in 2021 continued to be leaflets (86.7%), but the proportion of envelopes and booklets both reduced slightly year-on-year. The result of these shifts is an overall minor decrease in the average weight of each item to 20.64g. While this is in line with previous averages over the last five years, the details of exactly what formats are being sent have shifted.

Percentages of door drop material by category



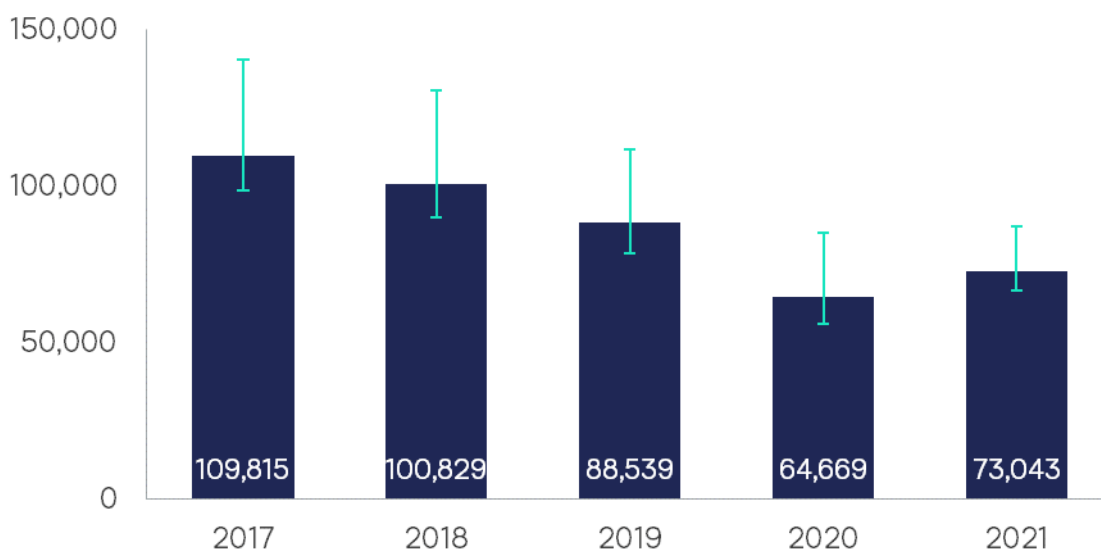
Average estimated weight of a door drop (grams)



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 both 'Unaddressed Print' and 'Mail'](#) 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 also increased, but continued to show a long-term reduction. Despite the increase in send volume, the continued growth of leaflets dominating the market has reduced the total door drop weight of material significantly. As mentioned previously, a major factor in relation to weight drop is the continued increase in paper prices in recent years. As a result, advertisers are opting for either lighter formats or committing to larger items to offer richer experiences.

Total door drop material (metric tonnes)

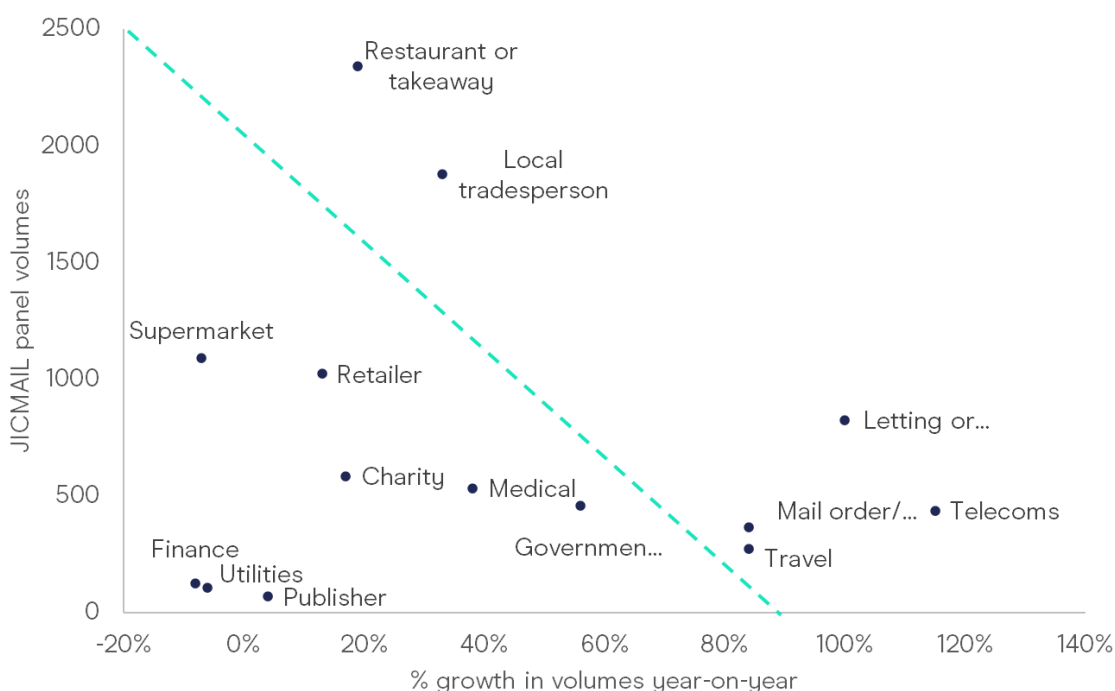


Share of Doormat (Sectors)

The chart below provides a perspective on the key advertiser sectors responsible for door drop volumes in 2021, with overall 2021 volumes plotted on the vertical axis and year-on-year growth on the horizontal. All sectors bar three have seen volumes increase in 2021. While the volumes in Utilities and Finance door drops are small enough to have little impact on overall growth, the -7% growth from Supermarkets in the door drop space will have had more of a bearing on growth rates.

Overall, however, this was easily compensated by some of the largest sectors that experienced modest double-digit growth in the 20-30% range (Restaurant / Takeaway and Local Tradesperson), and smaller categories that experienced an almost doubling of volumes (Mail Order / Online Retail, Travel, Letting / Estate Agents, and Telecoms).

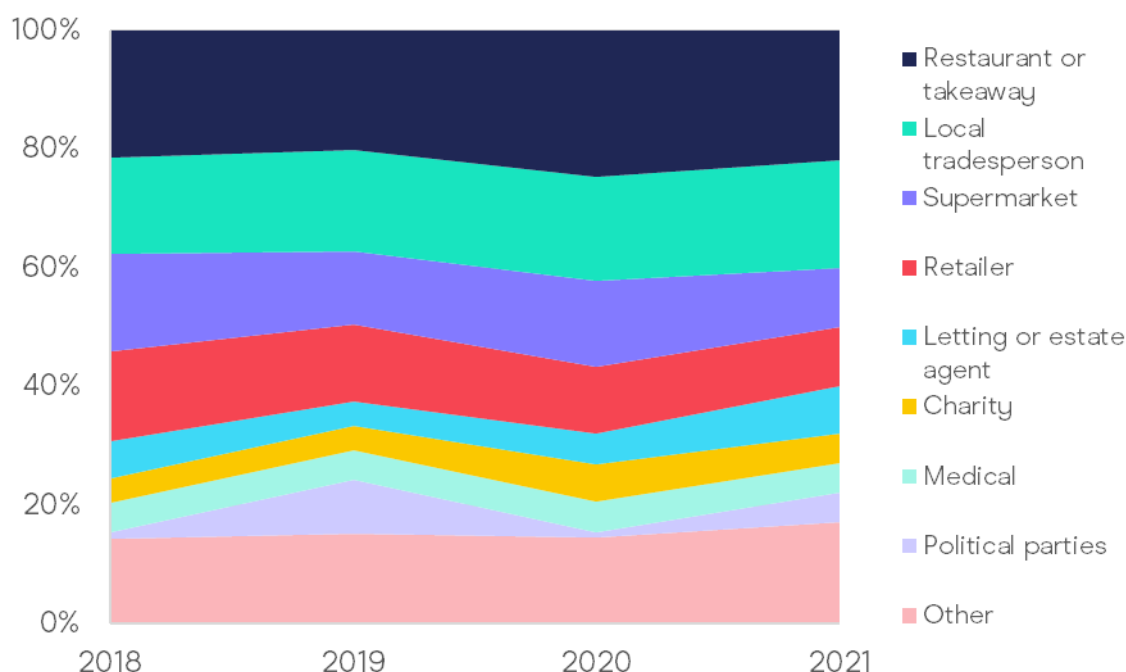
Door drop advertiser sector growth (2021)



The top three advertiser sectors in the Door Dop channel (Restaurant / Takeaway, Local Tradesperson and Supermarket) account for half of all door drop volumes overall, a sector mix that goes some way to explaining why the channel was so hard hit when the pandemic first reared its head in Spring 2020. While share figures have remained broadly consistent between the sectors year-on-year it is clear that Letting / Estate Agents have accounted for a greater proportion of activity while the housing market has regained buoyancy, and Political Parties have also made gains in the face of local election activity.

In 2020, the Charity sector made noticeable share gains in the door drop market, with many not-for-profit advertisers reporting positive results with the channel. This share has broadly been maintained in 2021, reflecting new-found enthusiasm for the Door-to-Door medium in line with measurable success stories.

Advertiser Sector Share of Door Drop Panel Volumes



Effectiveness

While the JICMAIL metrics of reach, frequency and impression delivery operate in the world of campaign planning inputs, the panel data also reveals a wealth of trends relating to door drop effectiveness – i.e., revealing insight in to campaign commercial outcomes.

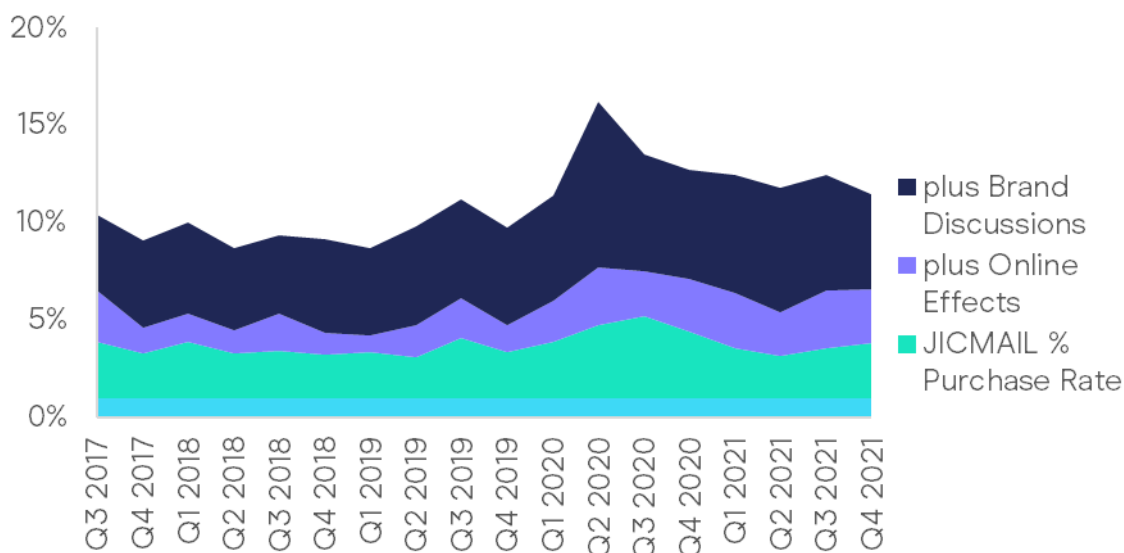
Conventional door drop response rates that are measured through unique tracking codes, voucher redemption or regional hold-out tests amongst other means, often only tell part of the story of the mail channel's role in driving campaign success.

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 (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 where they don't impact an immediate sale. In addition, they prompt discussions between consumers, promoting advocacy and extended reach. In total, by Q4 2021, 12% of Door Drops prompted purchase, digital or discussion related actions – way in excess of the 1% tracked through conventional means.

Door drops have effects far earlier in the customer journey than they are traditionally credited with.

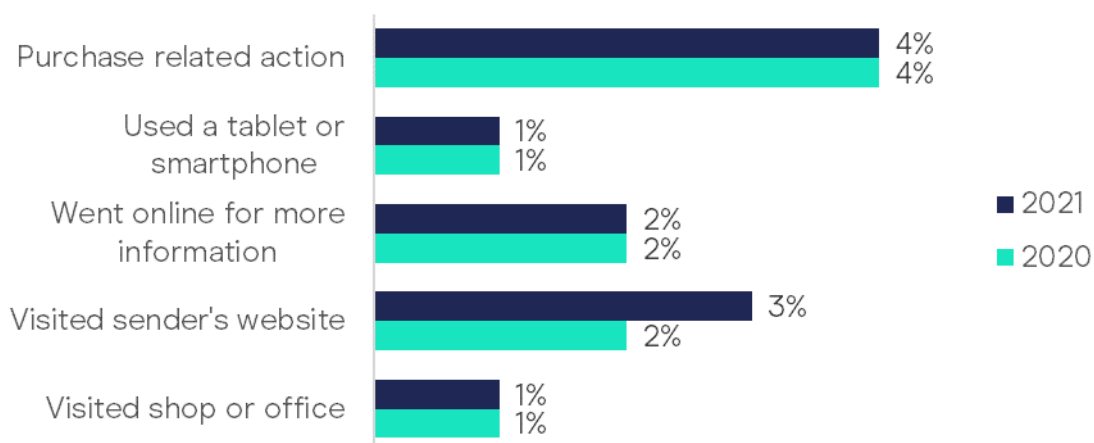
Door drop commercial actions (% of items)



Door drop effectiveness enjoyed a particular boost during the early stages of the pandemic in 2020. More time at home meant more time with in-home media and advertisers made their creative assets work harder than ever in the mail space. With this in mind, continued growth in 2021 was going to be harder to come by as the nation returned to some form of normality in the late pandemic phase. It was encouraging for the channel therefore, that purchase related effectiveness stayed stable year-on-year, as did store footfall prompted by mail. At the same time, the proportion of mail driving advertiser website traffic has increased by 50% from 2% to 3% – a seemingly small increment, but one which will no doubt be of significance when multiplied out over the volume of campaign.

The digital channel faces challenges around last-click-attribution measurement methods that assign the credit of digital effectiveness to the last digital ad that a consumer was exposed to, and often ignore multi-touch considerations that credit offline media exposure. Door drops are clearly an offline channel that has an online effect – understanding this trend will help improve attribution models and result in the more accurate assigning of effectiveness credit and campaign budget.

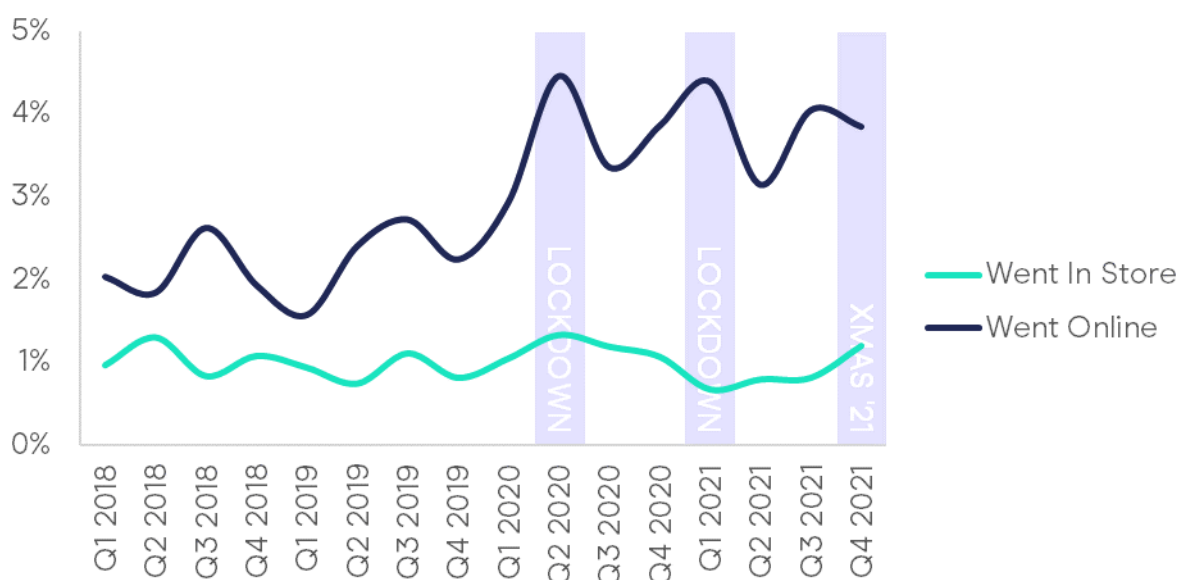
Door Drop Commercial Action (% of mail items)



The digital effects of door drops were absolutely transformed by the pandemic. As the light blue line in the chart below indicate, in the two large periods of widespread national lockdown, the proportion of door drops driving web visits shot upwards – as inevitably there were few other ways that purchases in many categories could actually be fulfilled. While digital effects dipped slightly between these lockdown periods, they were still way in excess of where they were pre-pandemic.

While footfall effects remained strong in the first lockdown, they dipped in the Winter 2021/22 lockdown. Since that point they have been steadily recovering, to the point where 1.2% of door drops prompted a store visit by Q4 2021.

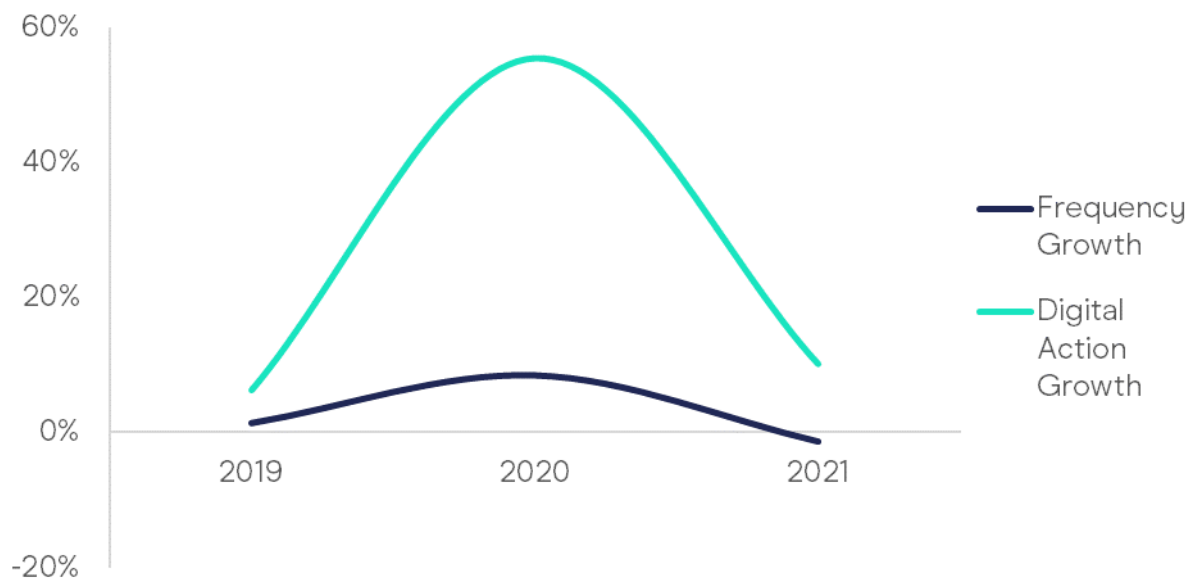
Door Drops Physical vs Digital Commercial Actions



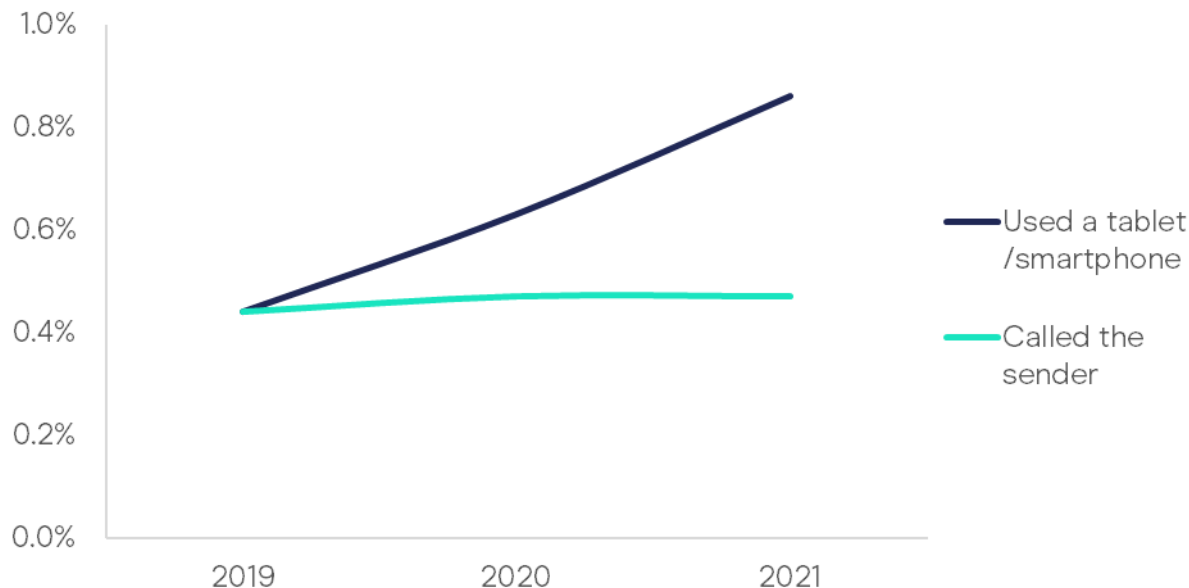
Increased Door Drop Efficiency at Driving Digital Effects

Not only are door drops increasing their digital effectiveness, but in addition *the efficiency* with which they are delivering digital effectiveness is also increasing. The chart below displays year-on-year growth in Door drop frequency of interaction and year-on-year growth in digital actions. With digital action growth is way in excess of frequency growth, the implication is that each ad impression generated by door drops is working harder than ever to drive digital outcomes. The confluence of creative content, audience targeting and share of doormat within a competitive set will all have contributed to the improved digital position the channel finds itself in when delivering results for advertisers.

Year-on-year Growth in Door Drop Frequency and Commercial Actions



Mobile Digital Actions vs Advertiser Calls Prompted by Door Drops



One of the fastest growing digital effects noted with the door drops, is the channel's ability to prompt tablet/smartphone usage. In fact, since 2019, the proportion of door drops driving mobile web usage has outstripped the amount prompting phone-calls to advertisers. Part of this will be factor of shifting audience habits and a movement towards younger audiences engaging with the channel (as covered in the previous chapter). Another is the growth in familiarity and usage of QR codes to easily transition consumer from a print to digital experience.

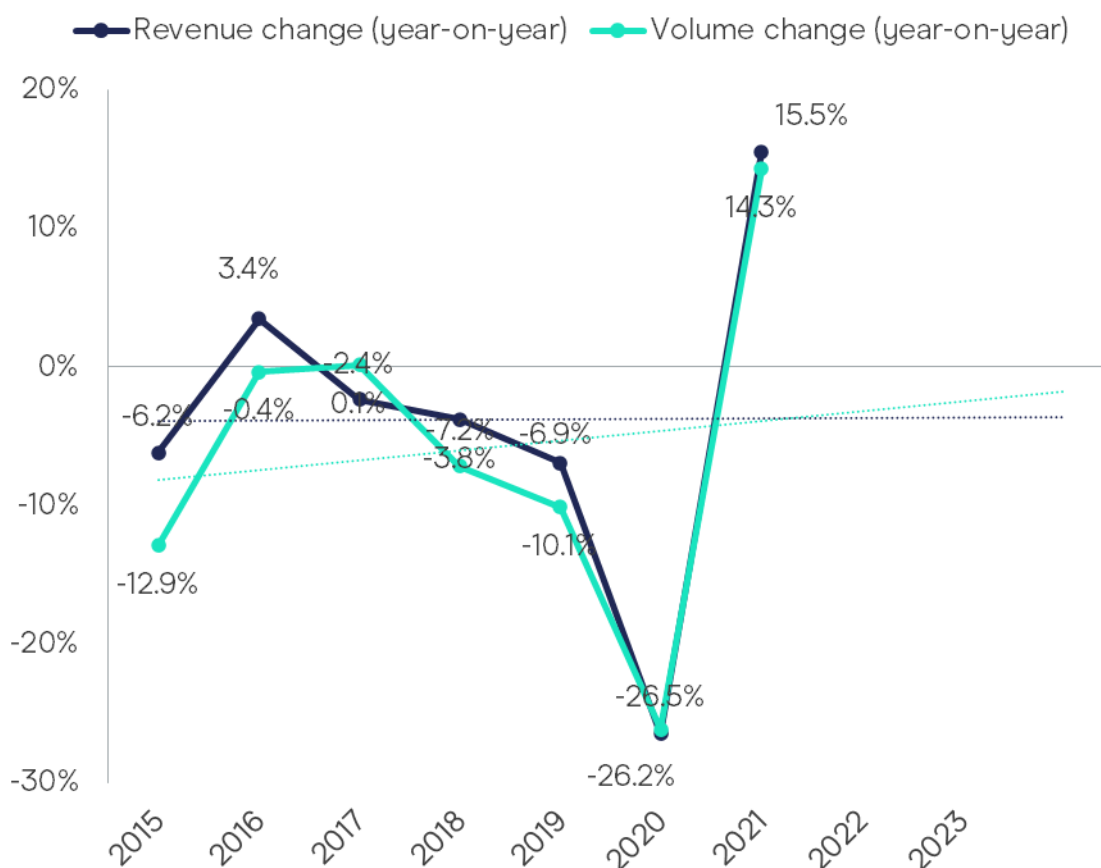
From a resource management point of view, understanding how customers are going to

respond and contact a brand following a mail-out is an important piece of insight. Reduced call centre volumes replaced by customer service through digital channels adds further weight to the efficiency argument for including door drops on the media plan.

Long-term Trends

Looking back over the historic figures the DMA reports each year, it's clear that it's been a challenging decade for door drops – even before the unprecedented events of recent years. However, the figures for 2021 show signs of positive recovery and that the long-term trend lines in the graph below have both returned to a steadier (and potentially positive) footing already.

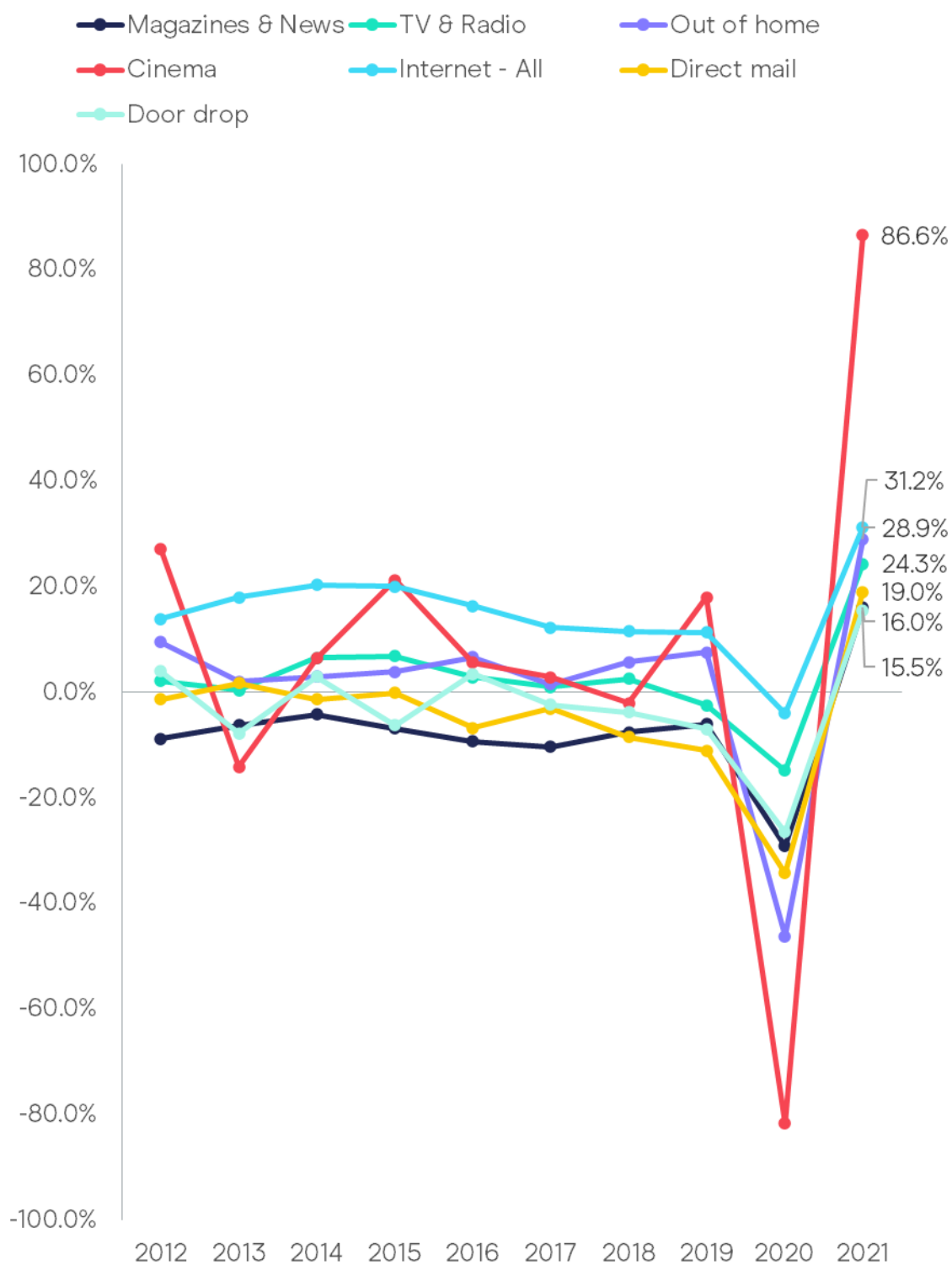
Change in year-on-year expenditure and volume



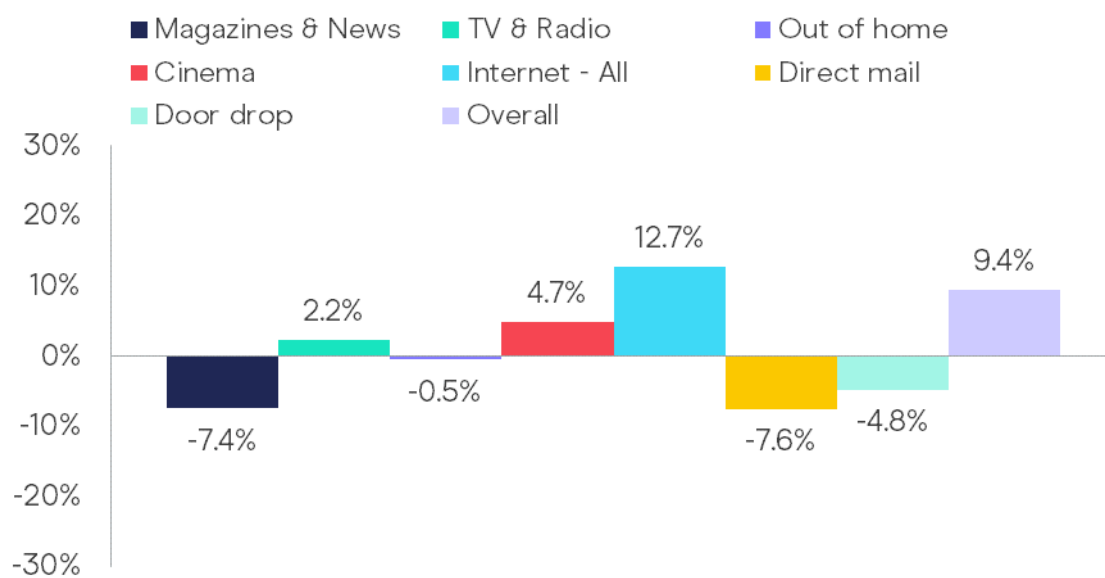
The latest [Advertising Association/WARC Expenditure Report](#) figures for 2021 show positive marketing spend growth across media. An overall 34.4% increase in ad spend shows many media started the return to pre-pandemic levels over the course of 2021, which is forecast to continue in 2022 according to the predictions of AA/WARC. Cinema and Out-of-Home, in particular, felt the extremes of early and late pandemic with significant cuts and returns in revenue in the last two years.

Comparing door drops to other channels, particularly other mail- or print-based media, over the last decade it's clear that it hasn't been an easy decade for many of these either. Direct mail and Magazines and News have seen similar year-on-year growth (15-20%), which has returned these media towards their 2019 levels, if not quite there yet.

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



/ 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 2022 and the data corresponds to January to December 2021. 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 on 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 be 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

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