



Telecoms Doordrop Market Intelligence Report January to June 2022

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25m Doordrop Items Distributed in H1 2022

13%
of Doordrop
Volumes in
Broadband &
Internet from
New Companies

Mobile &
Networks now
almost equal
volume to
Broadband and
Internet

44%
of Doordrop
Volume in the
Broadband &
Internet
sector

	<u>H1 2022</u>			<u>New Doordrop Users</u>		
<u>Category</u>	<u>No. of Companies</u>	<u>Volume (Millions)</u>	<u>Year on Year %</u>	<u>No. of Companies</u>	<u>Volume (Millions)</u>	<u>% 2022 Volume</u>
Broadband & Internet	22	11m	-32%	15	1.3m	13%
Mobile & Networks	3	10m	33%	1	51k	0.5%
Multimedia	9	4m	-35%	-	-	-
Telecoms	-	-	-	-	-	-
Total	34	25m	-16%	16	1.4m	6%

Doordrops Household Journey



Seen By
25m
People

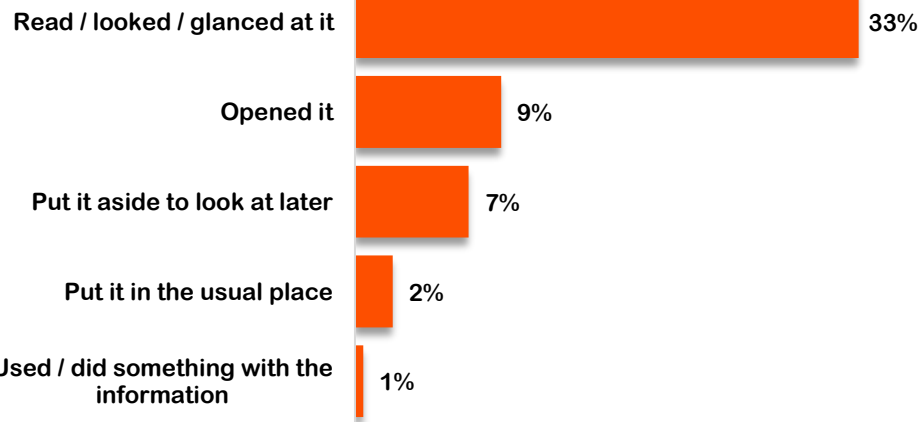
Telecoms
Volume: 24m
Reach: 1.03
Frequency:
2.83



Read
71m
Times

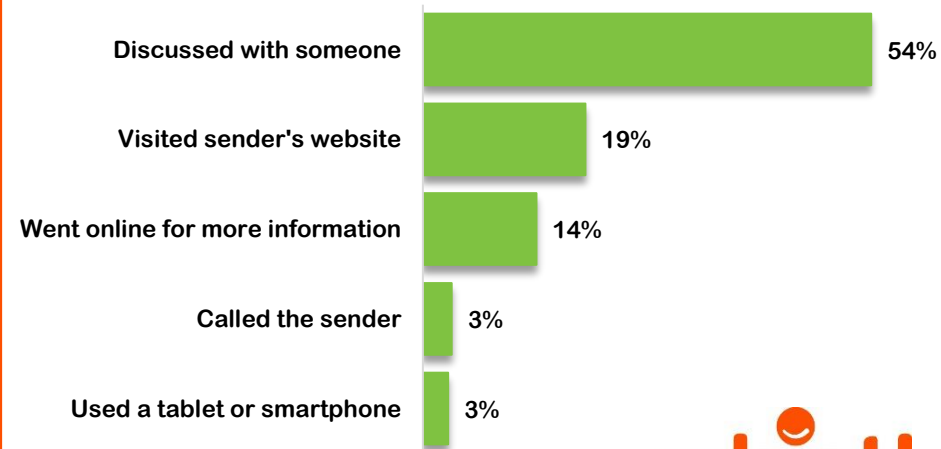
Physical Action

Proportion of Physical Actions



13% Resulted in a Commercial Action

Proportion of Commercial Actions



Competitive Periods in H1 2022

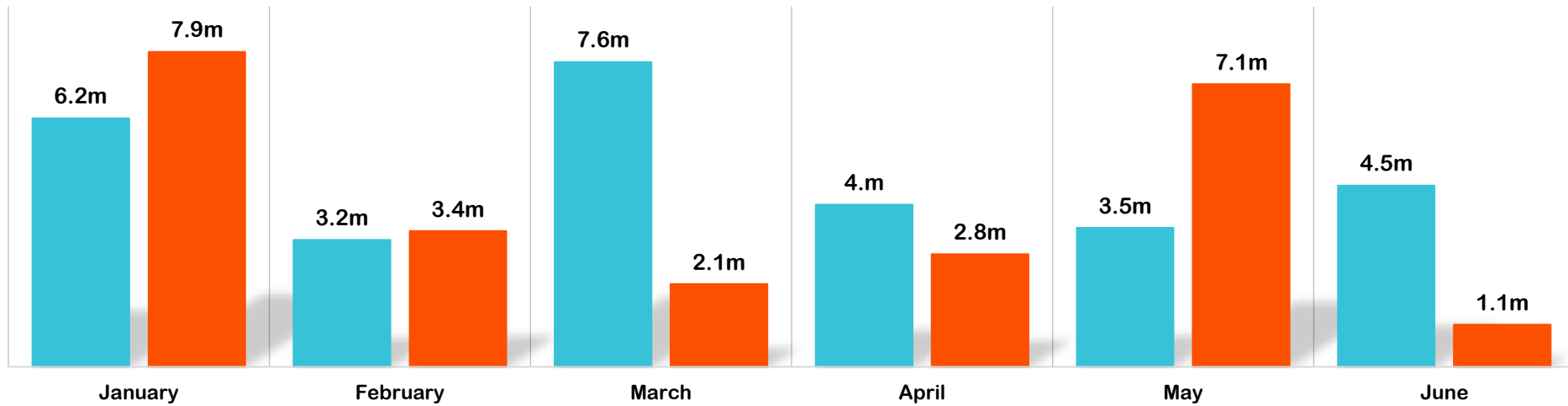
Telecoms
Doordrop
Volumes
by Month

+103%

YoY growth in
May while
March and June
decrease

January is
the most
competitive
month
in H1 2022

■ H1 2021 ■ H1 2022



Where did Telecoms Companies Reach Out To?

H1 2022
Volumes
by
Region

The most
competitive
regions in
H1 2022:
Lancashire
Midlands

+40%
YoY Volume
growth in the
Lancashire
region

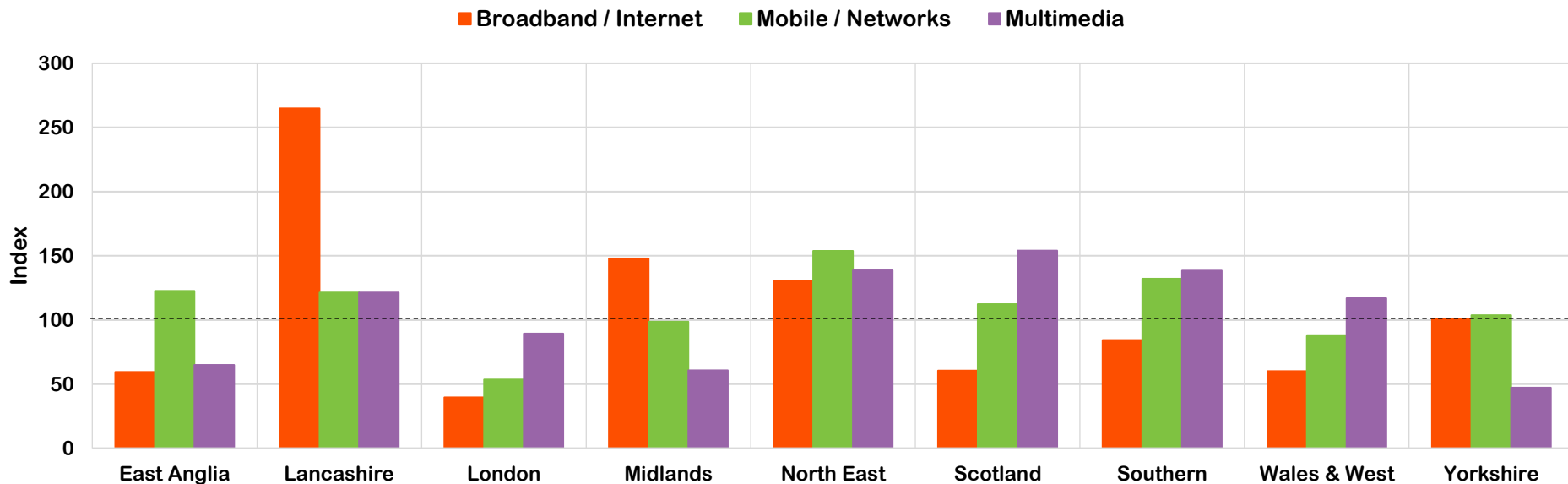


Where Telecoms Companies Reached Out To In H1 2022

H1 2022
Volume
Index by
Region &
Telecoms
Sector

London
remains the
least
targeted
region for all
Telecoms
sectors

Broadband /
Internet
Companies
driving the
growth in
Lancashire



Who Are Telecoms Companies Targeting?

H1 2020 &
2021
Volume per
Household
by Social
Class

ABs are the
least
targeted
Social Class
by Telecoms
Companies

DEs
consistently
receive the
most Doordrops
from Telecoms
Companies

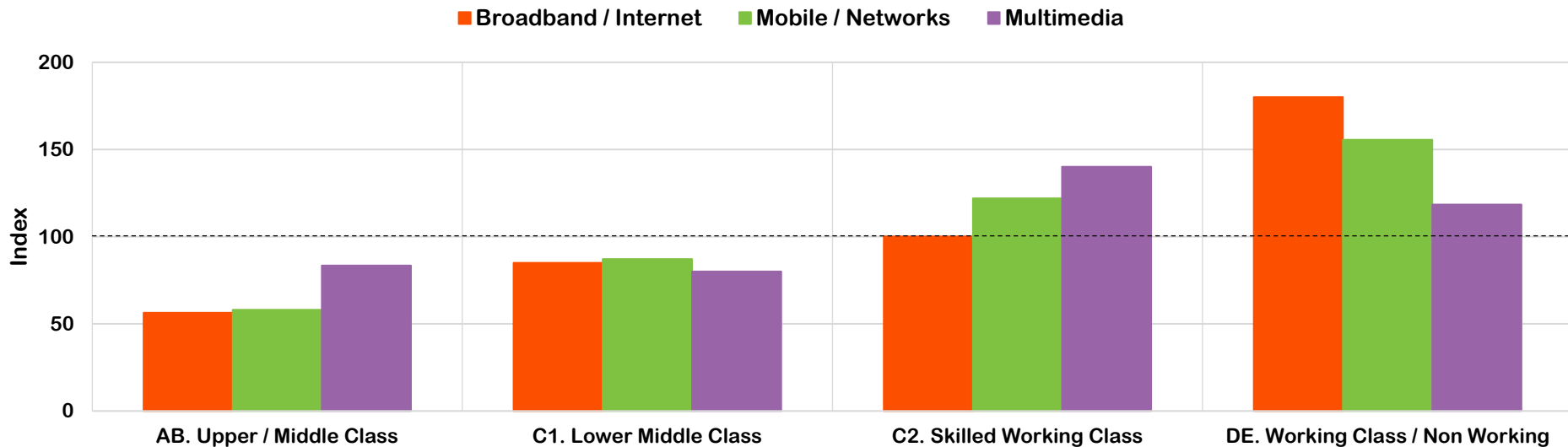


Who Are Telecoms Sectors Targeting?

H1 2022
Volume per
Household
by Social
Class &
Telecoms
Sector

C2DE.
Working
Class was
targeted by
Broadband/In
ternet
Companies
the most

All sectors
favour
targeting DE.
Working
Class / Non
Working

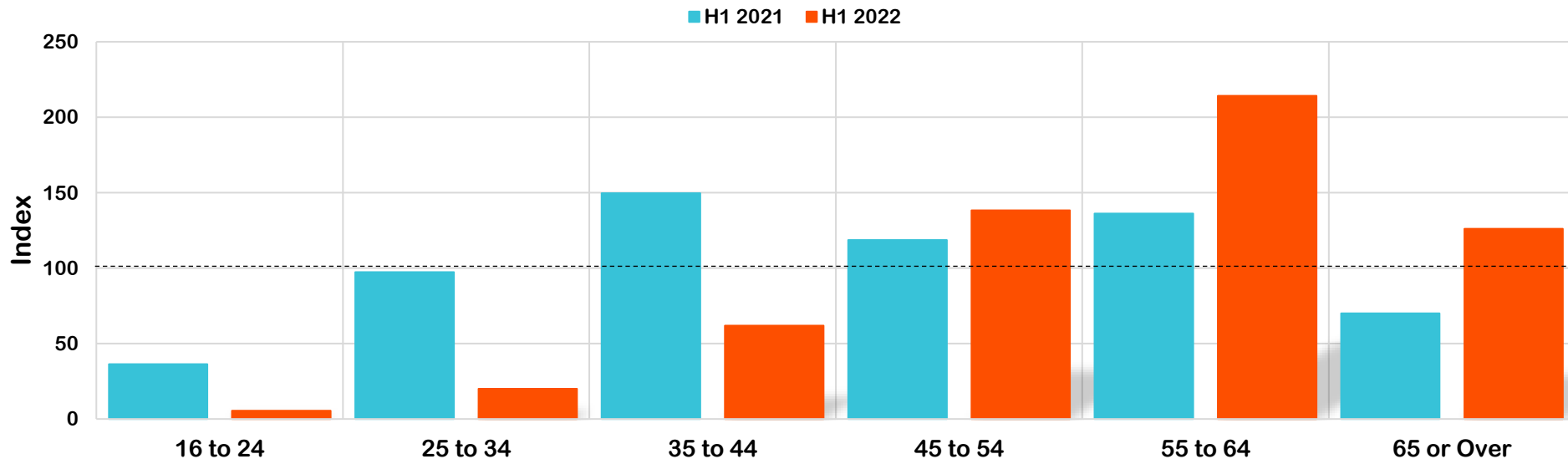


Who Are Telecoms Companies Targeting?

H1 2021 &
2022
Volume per
Household
by Age
Group

Telecoms
Companies
shifted focus
to older age
groups
55+ year olds
+47%

Under 44s
saw large
decreases in
2022
Doordrop
Volumes:
-74%

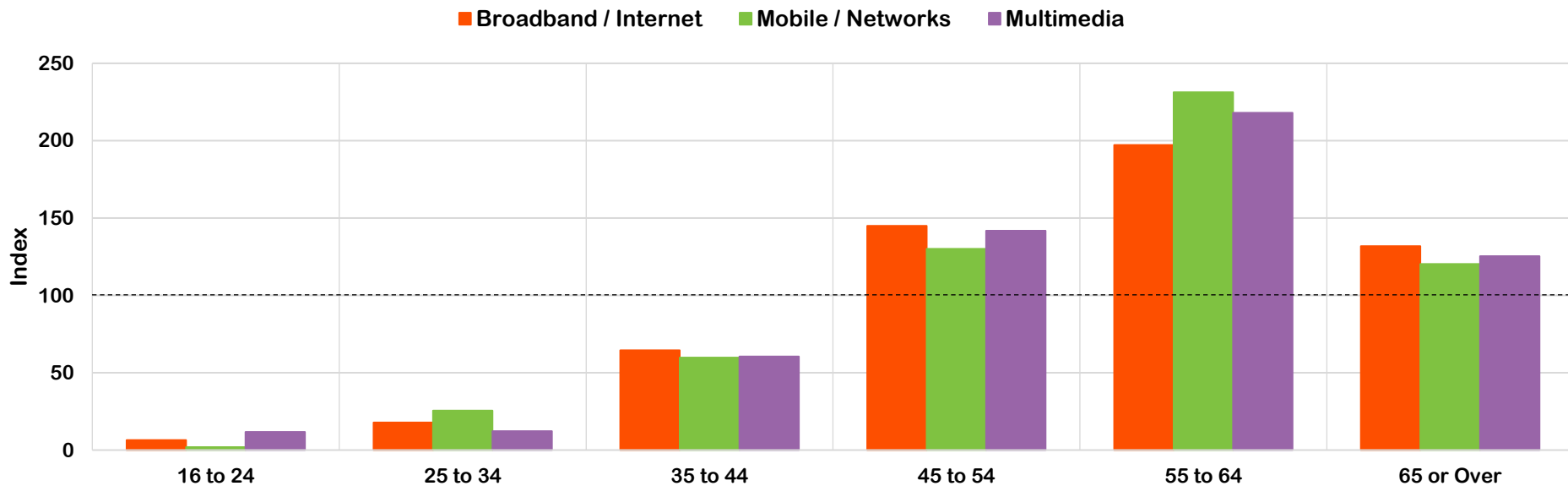


Who Are Telecoms Sectors Targeting?

H1 2020 &
2021 Volume
per
Household by
Age Group &
Telecoms
Sector





All Telecoms
Sectors
target the
55-64 year
olds the
most

People under
24 years old
are not
particularly
targeted by
any Telecoms
sector








The Top 5 Telecoms Companies in H1 2022

Most Doordrop Volume in H1 2022

Company:		 vodafone	TalkTalk For Everyone		
H1 2022 Volume: Vs. H1 2021:	10 – 15m (+63%)	4 – 6m (+66%)	4 – 6m (-75%)	2 – 4m (-3%)	500k – 1m New User
Category:	Multimedia	Mobile / Networks	Multimedia	Broadband / Internet	Broadband / Internet

Biggest Growth in Doordrop Volume in H1 2022

Company :		 vodafone			
H1 2022 Volume: Vs. H1 2021:	10 – 15m (+63%)	500k – 1m (>1000%)	2 – 4m (+21%)	0 – 250k New User	0 – 250k New User
Category:	Multimedia	Mobile / Networks	Broadband / Internet	Broadband / Internet	Broadband / Internet

Vodafone Creative: Example



Format:

2 page A4

Weight:

5g

Message:

“Switch & Save £337”

Incentive:

Save up to £337

Response Type:

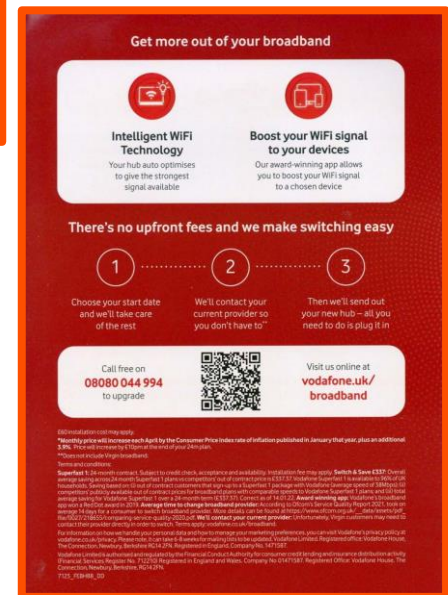
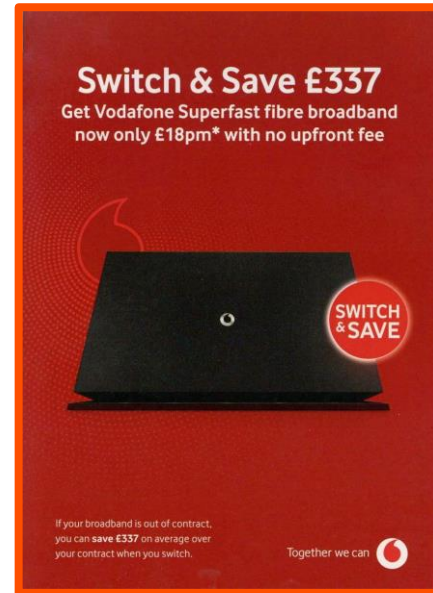
Telephone Number /
Online Sign-up / QR Code

Market:

Telecoms: Home Broadband

Month:

February 2022



Vodafone Creative: Analysis



The reader's main focus is the Broadband Hub, followed by the Save and Switch tag and the offer that is being promoted.

The viewer's gaze moves across the creative from middle to top but does not see the Vodafone logo in the first glance.



Vodafone Creative: Target Audience



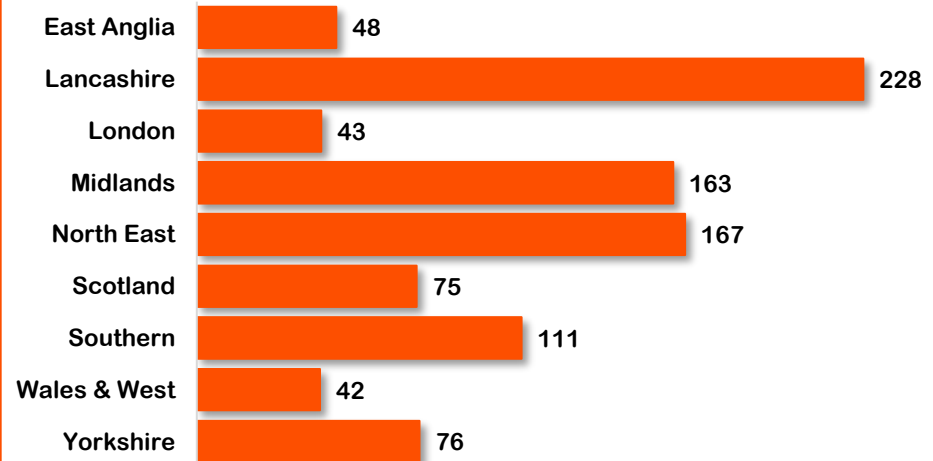
Targeting:

45-64 years old &
C2. Skilled Working Class

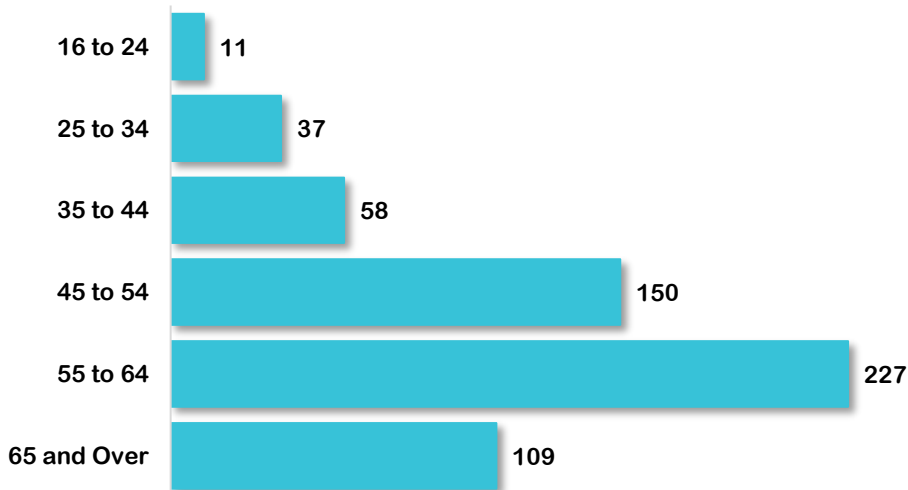
Geography:

Most likely Lancashire
Followed by North East & Midlands

BARB Regions



Age Group

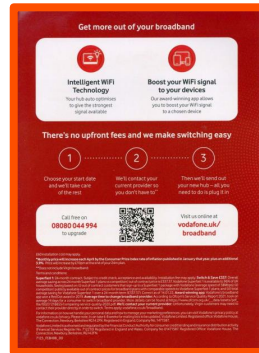


Source: Ebiquity

Social Class



Vodafone: Target Audience Response



Read On Average:
2.8 times

Remained In The Home For:
Up To 27 Days

Number Of Commercial
Actions Per Item:
More Than 1 In 20 Items
(5%)

Telecoms Industry

Read On Average:
2.87 times

Remained In The Home For:
Up To 27 Days

Number Of Commercial
Actions Per Item:
More Than 1 In 7 Items
(14%)

What Is Deemed As A Commercial Action:
Bought Something
Discussed With Someone
Visited Senders Website
Went Online For More Information
Called The Sender
Posted A Reply To The Sender

A Telecoms Success Story

Client: Anonymous

Campaign: Broadband

Category: Telecoms



**Improved CPA
of >£150 vs
<£80**



Campaign Objective

Using a blend of customer data, customer DM model data, Whistl data and our in house modelling expertise a new model was created and tested against the older model.



Campaign Results

Increase in New Customer Acquisition of **+35%**.

Improved overall CPAs



Data Sources

Ebiquity



- **Ebiquity captures, organises and analyses advertising communications from the UK.**
 - Providing clients with the visibility they require to react to competitor activity.
 - Giving clients greater confidence to develop successful communication strategies.
- **Used by advertisers, agencies and media owners to understand who, where, what, and how much is spent on advertising.**
- **All volumes are based upon a robust panel size demographically weighted & nationally representative & then up weighted to represent a national booking.**
- **Although some numbers may not be 100% accurate, figures have not been updated with actual known numbers to provide a consistent approach and overall comparable picture against all advertisers.**

JICMAIL - A Media Currency For Mail & Doordrops



Founded By



- JICMAIL helps media planners understand the power of these channels using exactly the same measurement standards as other media channels.
- JICMAIL is a joint industry initiative supported by the IPA and ISBA that measures readership reach and frequency of exposure to those tangible print items delivered to the home.
- The data from the JICMAIL panel informs us that 68% of all Doordrops are read or looked at and average frequency of 2.94 times, with a lifespan of up to 28 days.



Experian: Mosaic 7



- Experian Mosaic 7 provides in-depth understanding across all UK households.
- Accurate reflection of the UK consumer by demographic, lifestyle, behaviour.
- Providing rich and details consumer insight to build efficient campaigns.
- Key Factors Include:
 - Age Band
 - Household Income
 - Property Type
 - Education
 - Family
 - Adoption to technology

Kantar Media: TGI Survey



- Drawing on an annual sample of 24,000 adults, the survey is updated four times a year.
- Questions on spending behaviours, attitudes & methods to shopping, e.g.:
 - I couldn't live without the internet on my mobile phone
 - Shopping Online makes my Life Easier
- Key lifestyles and attitudes, including:
 - Financial
 - Spending Habits
 - Hobbies and leisure activities

Thank you



**For further information or enquiries
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