



Retail Doordrop Market Intelligence Report January to June 2022

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- **JIC Mail and the Household Journey**
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382m Doordrop Items Distributed In H1 2022

+87%

Growth in
Doordrop
Volumes for the
Retail sector in
H1 2022

+178

million

Doordrops in
H1 2022

46%

of Retailers in
H1 2022 are
New to
Doordrops

Category	<u>H1 2022</u>			<u>New Doordrop Users</u>		
	<u>No. of Retailers</u>	<u>Volume (Millions)</u>	<u>Year on Year %</u>	<u>No. of Retailers</u>	<u>Volume (Millions)</u>	<u>% 2022 Volume</u>
FMCG	58	21m	+177%	35	14m	68%
Grocery	45	79m	+149%	14	7m	9%
Household Retail	220	131m	+55%	93	9m	6%
Online Retail	45	51m	+91%	26	29m	56%
Retail Stores	95	51m	+72%	28	11m	22%
Other	57	50m	+99%	43	4m	8%
Total	520	382m	+87%	239	74m	19%

Doordrops Household Journey



Seen By
404m
People

Retail

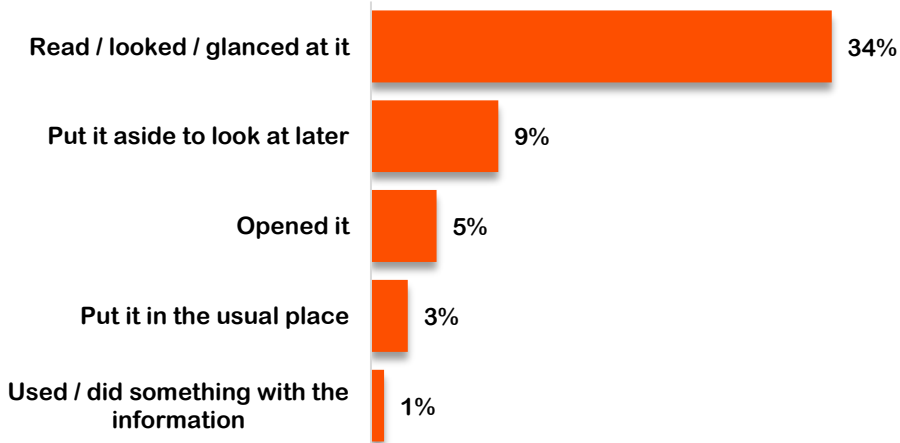
Volume: 382m
Reach: 1.06
Frequency:
2.85



Read
1.2b
Times

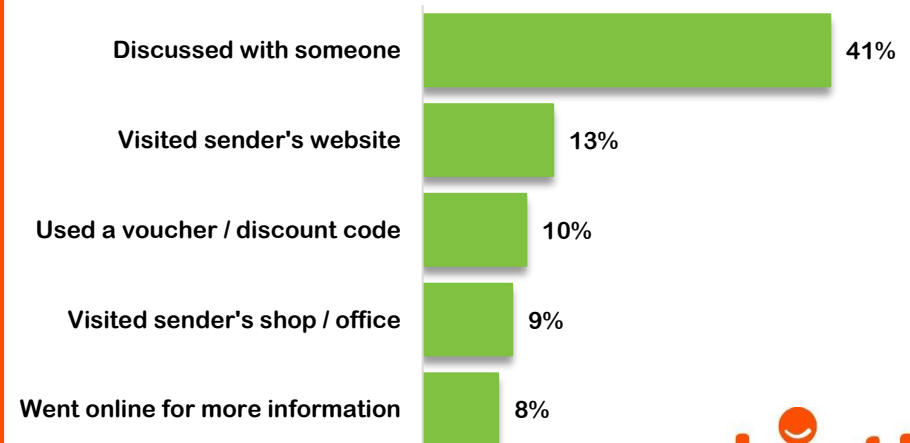
Physical Actions

Proportion of Physical Actions



14% Resulted in a Commercial Action

Proportion of Commercial Actions



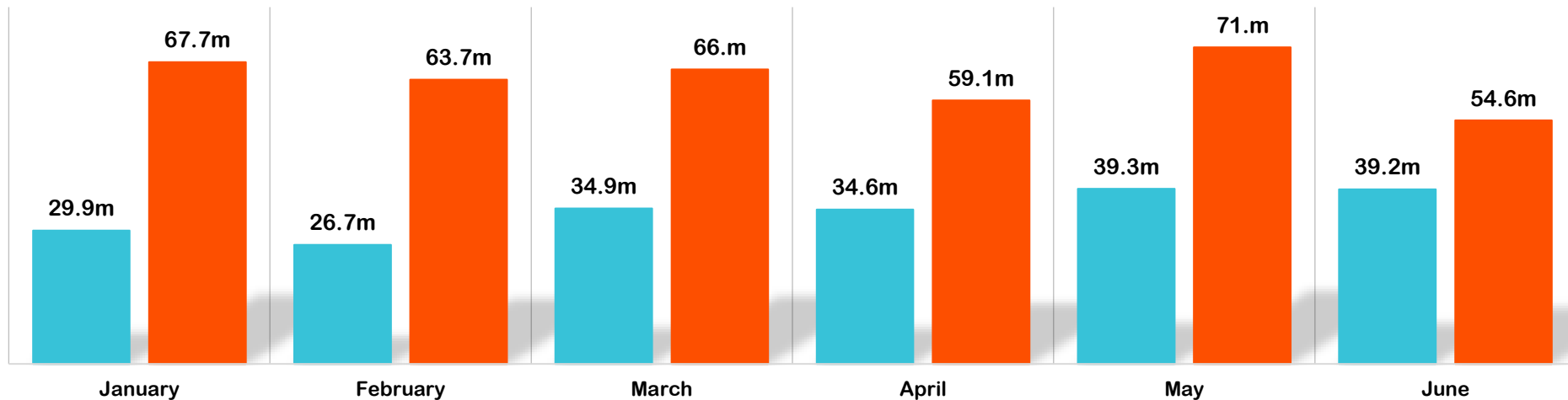
Competitive Periods in H1 2022

Retail
Doordrop
Volumes
by Month

Doordrop
Volumes are
fairly
consistent
month by
month

May is
consistently
the most
competitive
period in
H1 2022

■ H1 2021 ■ H1 2022

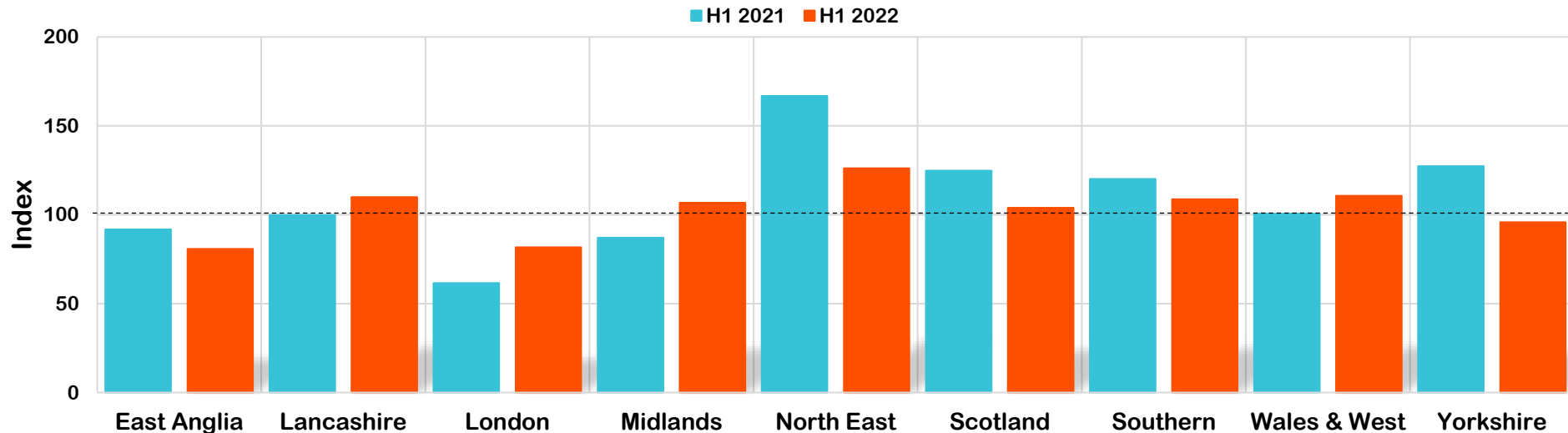


Where did Retailers Reach Out To?

**H1 2022
Volume
Index by
Region**

The most
competitive
regions are:
London
Midlands &
Wales & West

London
(+167%) &
Midlands
(+139%) have
increased
volumes the
most (YOY)

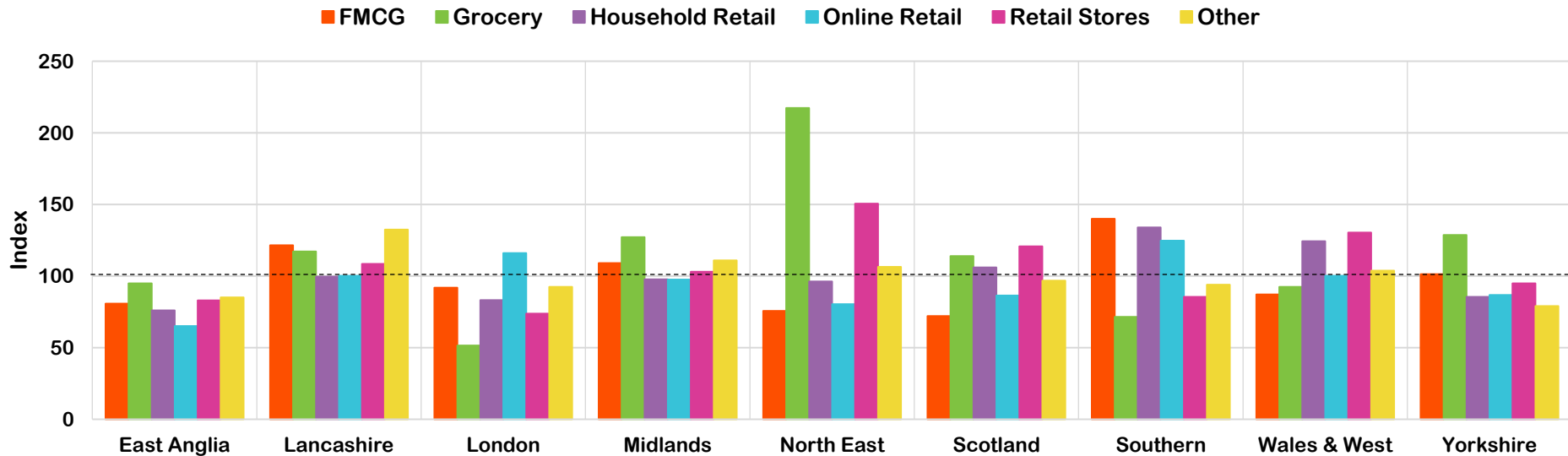


Where Retail Sectors Reached Out To In H1 2022

2022
Volume
Index by
Region &
Retail
Sector

Grocery
Retailers
heavily
targeted the
North East
Region

Lancashire
was
consistently
targeted by
the Retail
Sectors

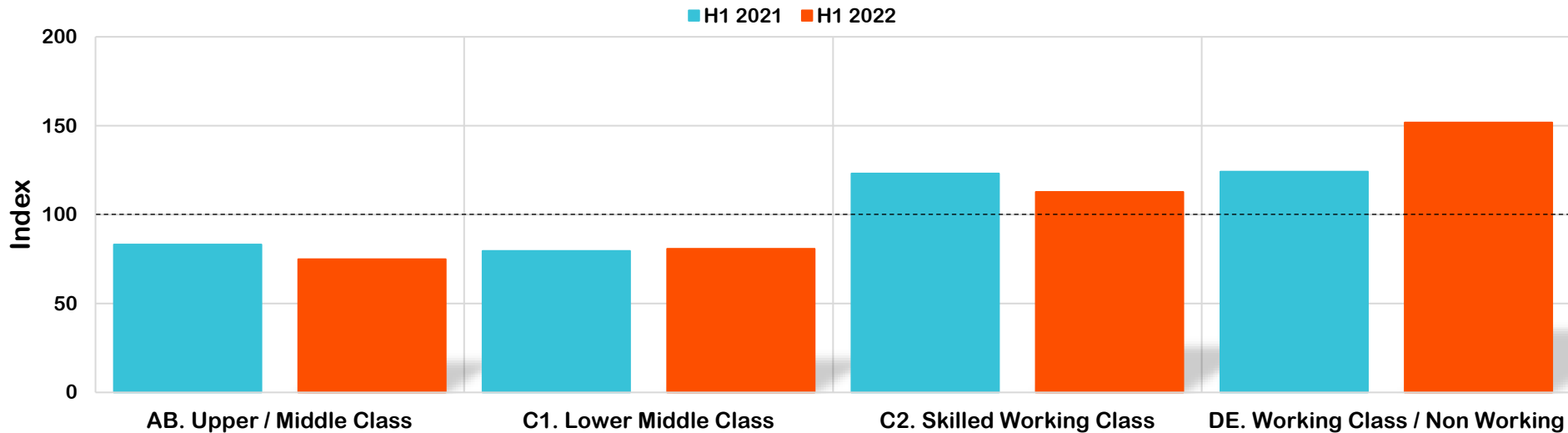


Who Are Retailers Targeting?

**H1 2021 &
2022
Volume per
Household
by Social
Class**

**C1s had the
biggest YOY
increase in
terms of
items
received
+126%**

**C2DEs
consistently
receive the
most
Doordrops
from
Retailers**

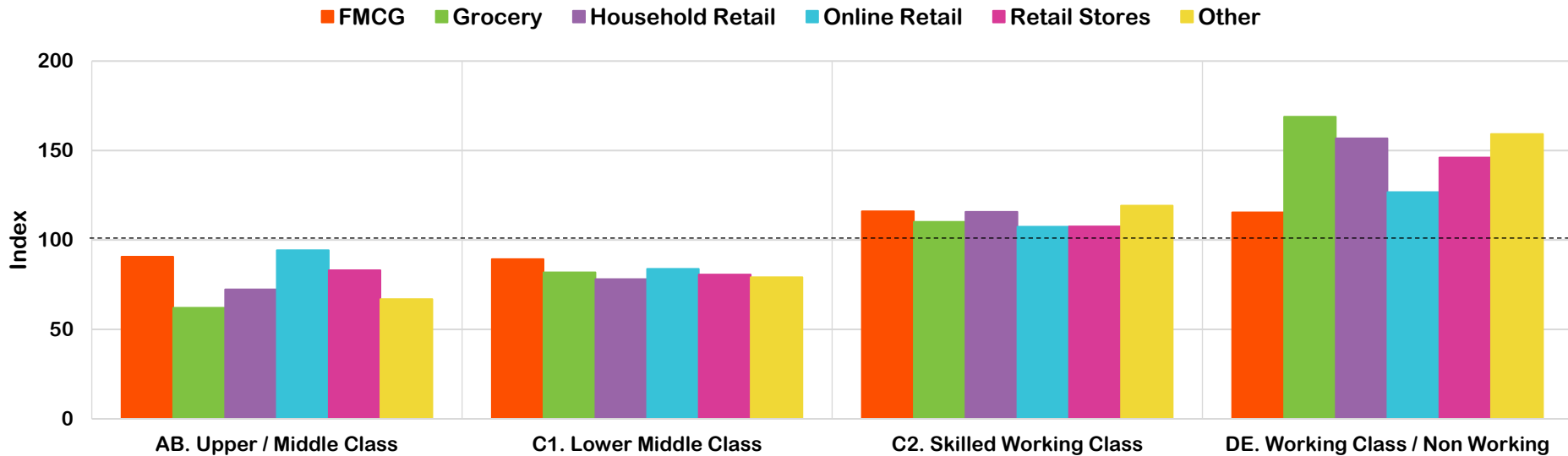


Who Are Retail Sectors Targeting?

**H1 2022
Volume per
Household
by Social
Class &
Retail
Sector**

**Grocery &
Household
Retailers
targeted DE.
Working Class /
Retired the
most**

**Online
Doordrop
Volumes were
spread evenly
across the
Social
Classes**

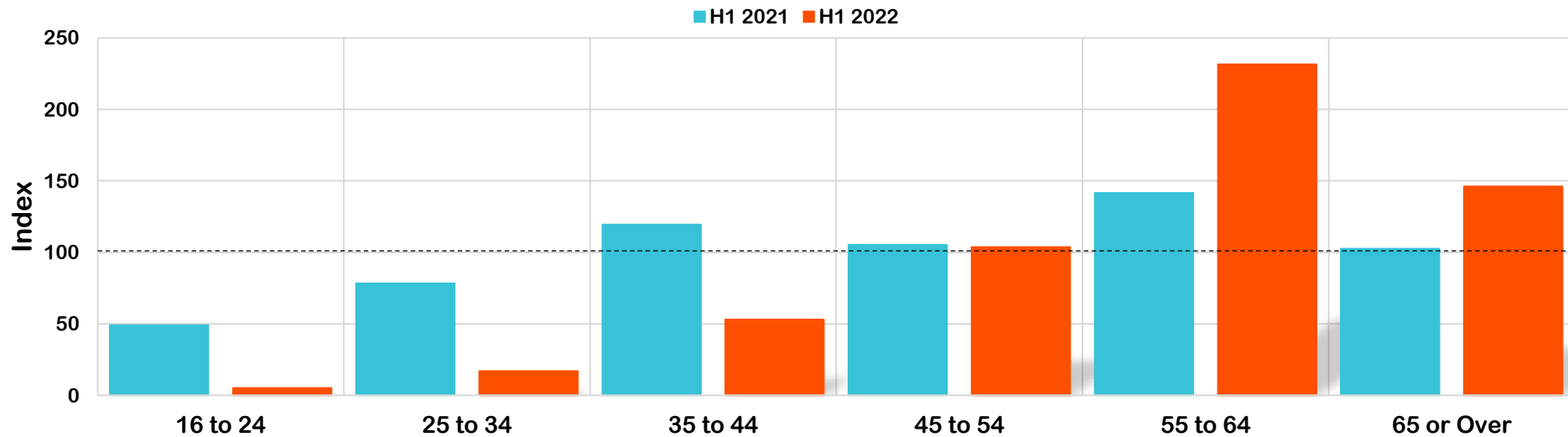


Who Are Retailers Targeting?

H1 2021 &
2022
Volume per
Household
by Age
Group

7% of
Retailer
Doordrops
target 55+
year olds

Over 45s saw
large increases
in 2022
Doordrop
Volumes:
45-54 = +81%
55-64 = +209%
65+ = +191%



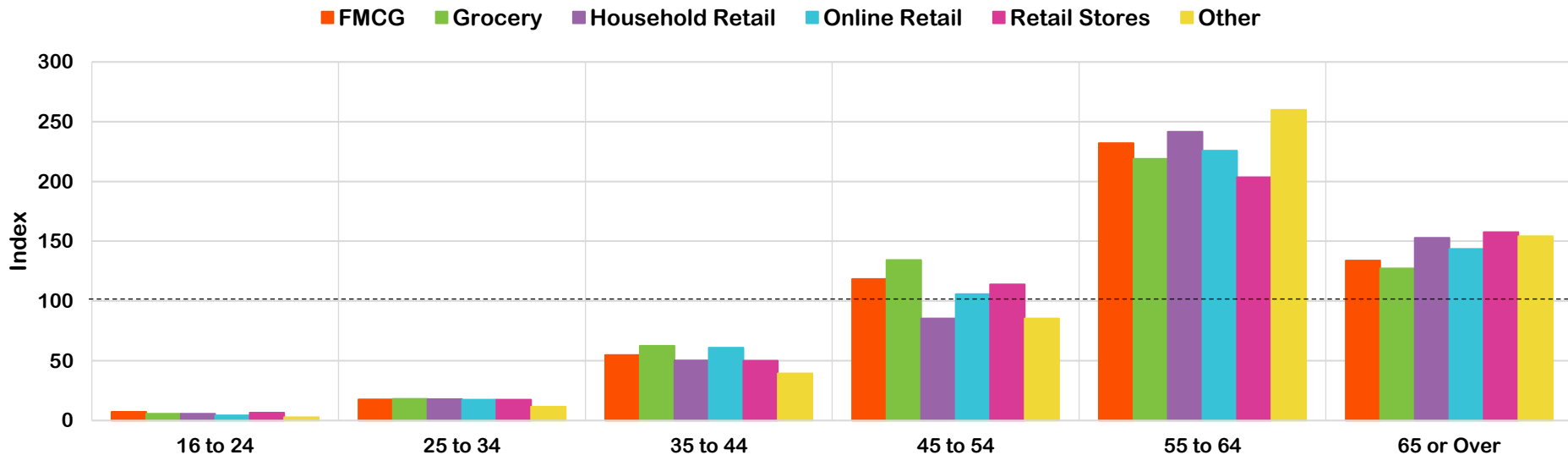
Who Are Retail Sectors Targeting?

**H1 2021 &
2022**

**Volume per
Household by
Age Group &
Retail Sector**

**>87% of
Doordrops
are aimed at
45+ year olds
in all Retail
Sectors**

**Grocery
Retailers
target 45-54
year olds
more than
other
sectors**



The Overall Top 5 Retailers in H1 2022

Most Doordrop Volume in H1 2022

Retailer:



H1 2022 Volume:
Vs. H1 2021:

45 - 50m
(+986%)

20 - 25m
(+128%)

15 - 20m
(+50%)

15 - 20m
(-28%)

10 - 15m
(>10,000%)

Category:

Grocery

Retail

Other

Household

Grocery

Biggest Growth in Doordrop Volume in H1 2022

Retailer:



H1 2022 Volume:
Vs. H1 2021:

45 - 50m
(+986%)

10 - 15m
(>10,000%)

10 - 15m
New User

20 - 25m
(+128%)

10 - 15m
New User

Category:

Grocery

Grocery

Online

Retail

Online

The Top 5 Grocery Retailers in H1 2022

Most Doordrop Volume in H1 2022

Retailer:



WAITROSE
& PARTNERS



ASDA

Sainsbury's

H1 2022 Volume:
Vs. H1 2021:

45 - 50m
(+984%)

10 - 15m
(>10,000%)

2 - 4m
(-69%)

2 - 4m
(-44%)

2 - 4m
New User

Category:

Grocery

Grocery

Grocery

Grocery

Grocery

Biggest Growth in Doordrop Volume in H1 2022

Retailer:



WAITROSE
& PARTNERS

Sainsbury's

Morrisons

McColl's

H1 2022 Volume:
Vs. H1 2021:

10 - 15m
(>10,000%)

10 - 15m
(>10,000%)

2 - 4m
New User

1 - 2m
(+194%)

1 - 2m
(+64%)

Category:

Grocery

Grocery

Grocery

Grocery

Grocery

Waitrose Creative: Example

WAITROSE
& PARTNERS

Weight:
5g

Message:
“£30 off”

Incentive:
£10 off each of first 3 shops

Response Type:
Online Store

Market:
Supermarket

Month:
February 2022



Waitrose Front Page Creative: Analysis

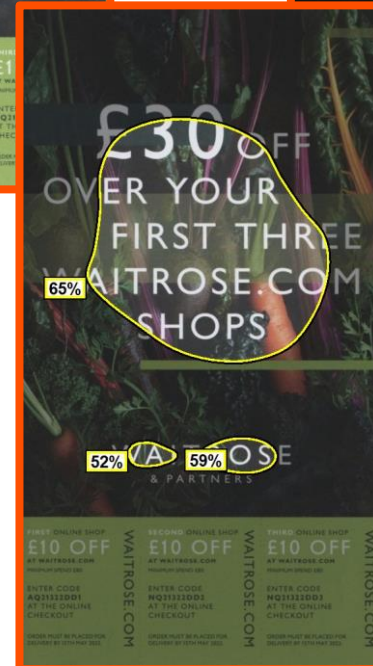
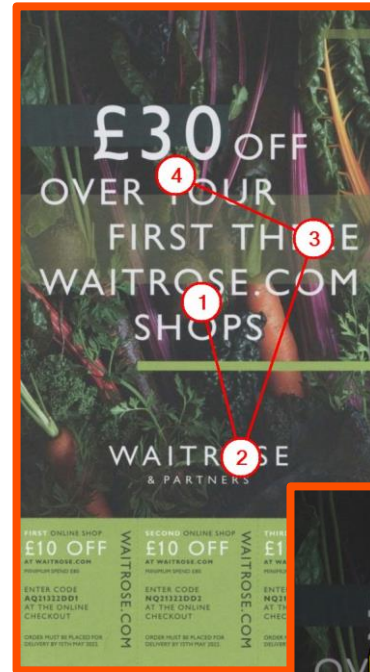
WAITROSE
& PARTNERS



The reader's main focus is the Waitrose website address in the middle of the creative, followed by the logo rather than the offer.

The offers and codes at the bottom of the creative are not noticed in the viewers first glance.

The contrast between the text and the background image draws the eye to the text.



Waitrose Creative: Target Audience

WAITROSE
& PARTNERS

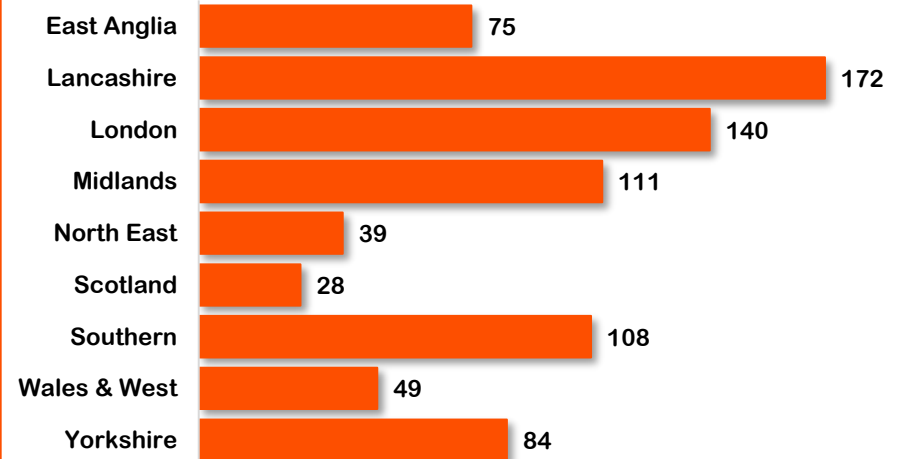
Targeting:

45+ years old &
C1. Lower Middle Class &
C2. Skilled Working Class

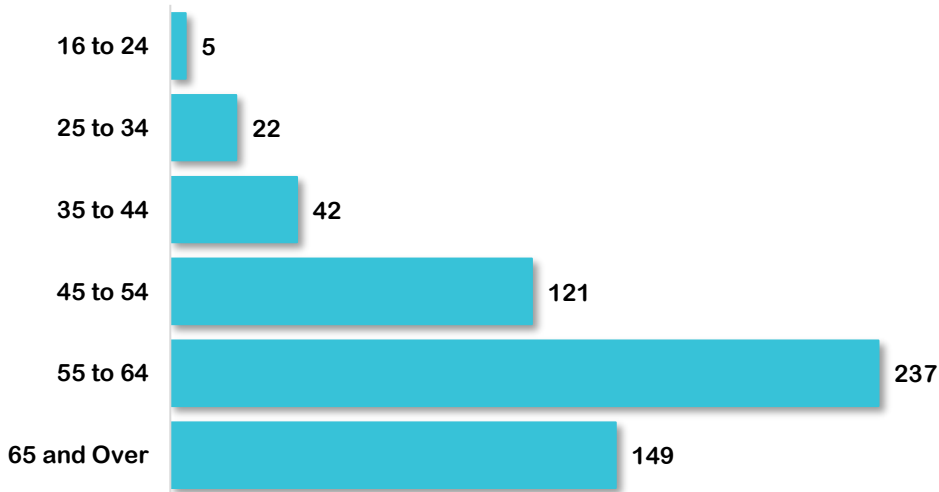
Geography:

Lancashire & London

BARB Regions



Age Group



Source: Ebiquity

Social Class



Waitrose: Target Audience Response

WAITROSE
& PARTNERS



Read On Average:
3.03 times

Remained In The Home For:
Up To 26 Days

**Number Of Commercial
Actions Per Item:**
More Than 1 In 7 Items
(15%)

Retailer Industry

Read On Average:
3.04 times

Remained In The Home For:
Up To 27 Days

**Number Of Commercial
Actions Per Item:**
More Than 1 In 7 Items
(17%)

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

The Top 5 Household Retailers in H1 2022

Most Doordrop Volume in H1 2022

Retailer:

HILLARYS
You'll love what we do



Plumbs



H1 2022 Volume:
Vs. H1 2021:

15 - 20m
(-28%)

10 - 15m
(+237%)

10 - 12m
(+1,532%)

8 - 10m
(+66%)

6 - 8m
(+57%)

Category:

Household

Household

Household

Household

Household

Biggest Growth in Doordrop Volume in H1 2022

Retailer:



Plumbs

Robert Dyas

AQUABILITY

H1 2022 Volume:
Vs. H1 2021:

10 - 12m
(+1,532%)

10 - 15m
(+237%)

8 - 10m
(+66%)

4 - 6m
(+245%)

2 - 4m
(+376%)

Category:

Household

Household

Household

Household

Household

Hillarys Creative: Example

HILLARYS
You'll love what we do

Weight:
15g

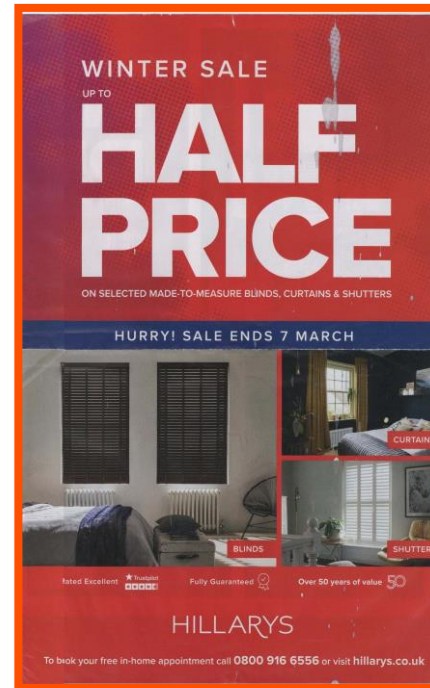
Message:
“Winter Sale up to HALF PRICE”

Incentive:
Up to 50% off

Response Type:
Via Telephone / Online

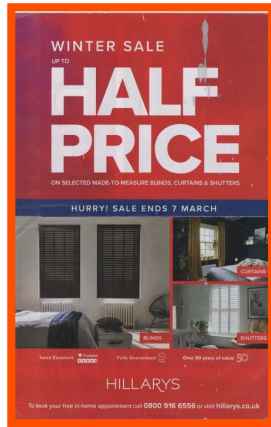
Market:
Household

Month:
February 2022



Hillarys Front Page Creative: Analysis

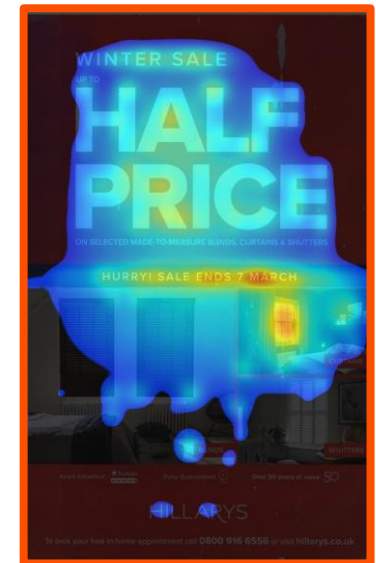
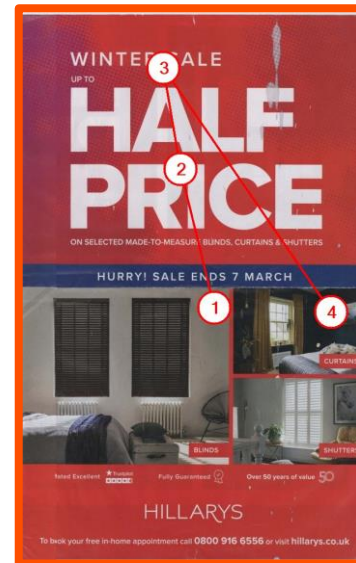
HILLARYS
You'll love what we do



The reader's main focus is "hurry sale ends" which then draws the eye to the "half price" sale.

However, the Hillarys logo and the call to action is low scoring. This is not noticed in the viewers first glance.

The viewer's gaze moves towards the top of the creative where it sees the offer quite clearly in a bold font and contrasting background.



Hillarys Creative: Target Audience



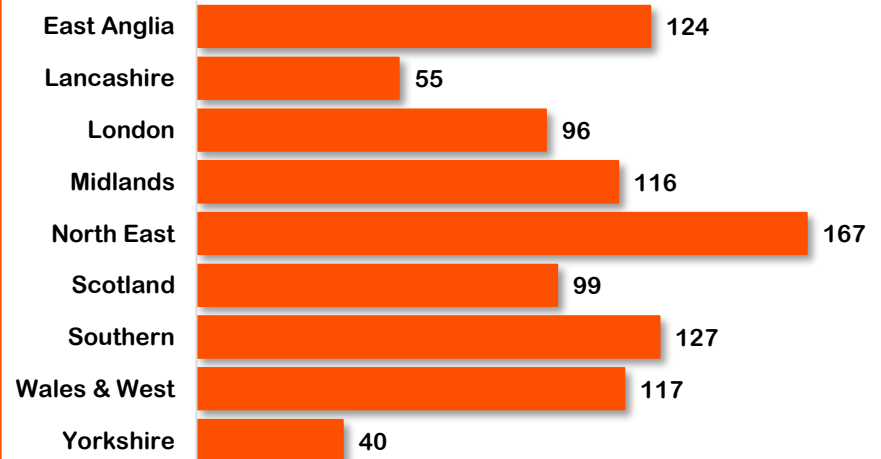
Targeting:

55+ years old &
C2. Skilled Working Class &
DE. Working Class / Non Working

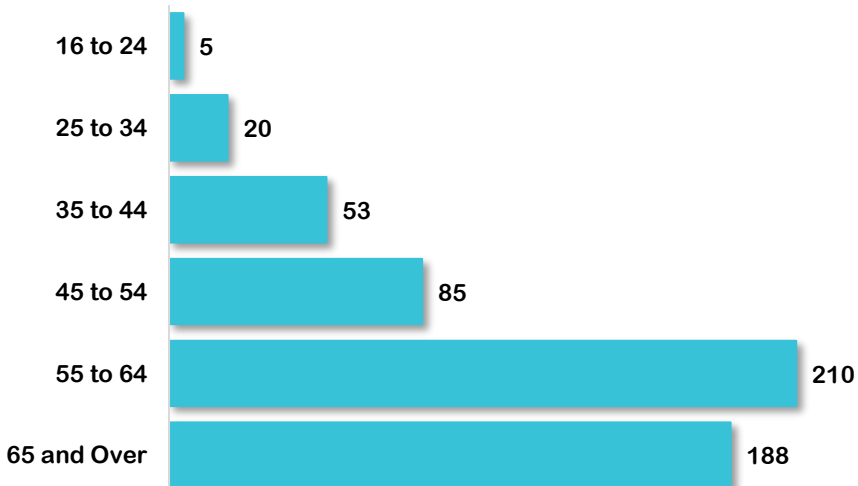
Geography:

Most likely North East
Followed by Southern and East Anglia

BARB Regions

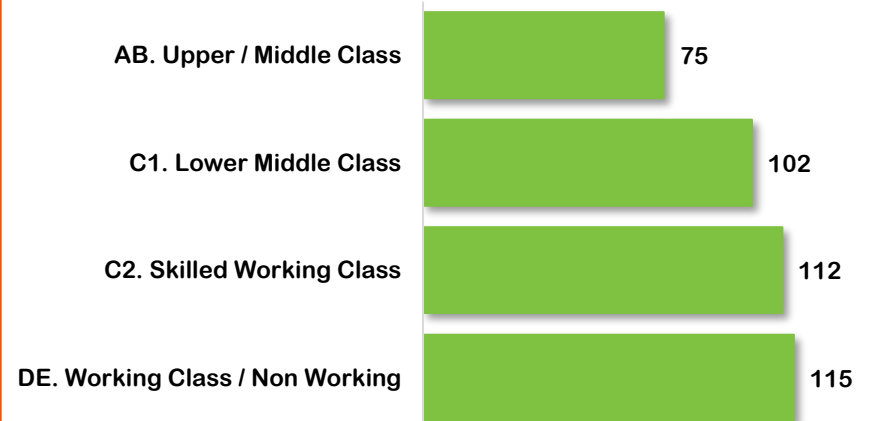


Age Group



Source: Ebiquity

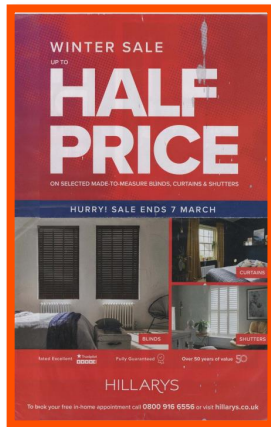
Social Class



Hillarys: Target Audience Response

HILLARYS

You'll love what we do



Read On Average:
2.62 times

Remained In The Home For:
Up To 15 Days

Number Of Commercial
Actions Per Item:
More Than 1 In 7 Items
(15%)

Retailer Industry

Read On Average:
3.04 times

Remained In The Home For:
Up To 27 Days

Number Of Commercial
Actions Per Item:
More Than 1 In 7 Items
(17%)

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

The Top 5 Online Retailers in H1 2022

Most Doordrop Volume in H1 2022

Retailer:



HARRY'S

**H1 2022 Volume:
Vs. H1 2021:**

10 - 15m
New User

10 - 15m
New User

10 - 15m
(+93%)

6 - 8m
(+567%)

2 - 4m
(+70%)

Category:

Online

Online

Online

Online

Online

Biggest Growth in Doordrop Volume in H1 2022

Retailer:



**H1 2022 Volume:
Vs. H1 2021:**

10 - 15m
New User

10 - 15m
New User

6 - 8m
(+567%)

10 - 15m
(+93%)

1 - 2m
New User

Category:

Online

Online

Online

Online

Online

Oddbox Creative: Example

ODDBOX

Weight:
7g

Message:
“Perfect doesn’t grow on trees”

Incentive:
50% off First Box

Response Type:
Online Sign Up

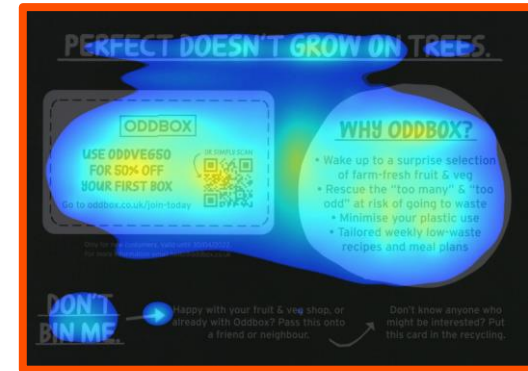
Market:
Food: Mail Order

Month:
December 2021



Oddbox Front Page Creative: Analysis

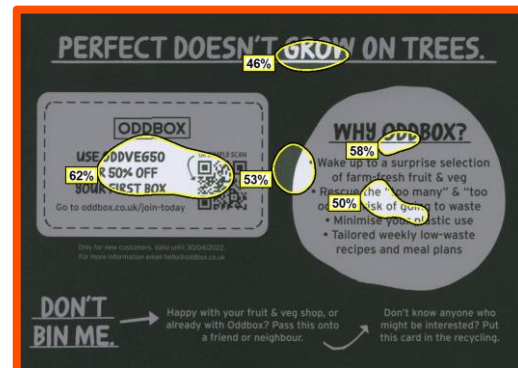
ODDBOX



The reader's main focus is the offer followed by the reasons to choose this brand.

The sequence of eye is concentrated around the middle of the creative.

The logo is not noticed in the reader's first glance.



Oddbox Creative: Target Audience

ODDBOX

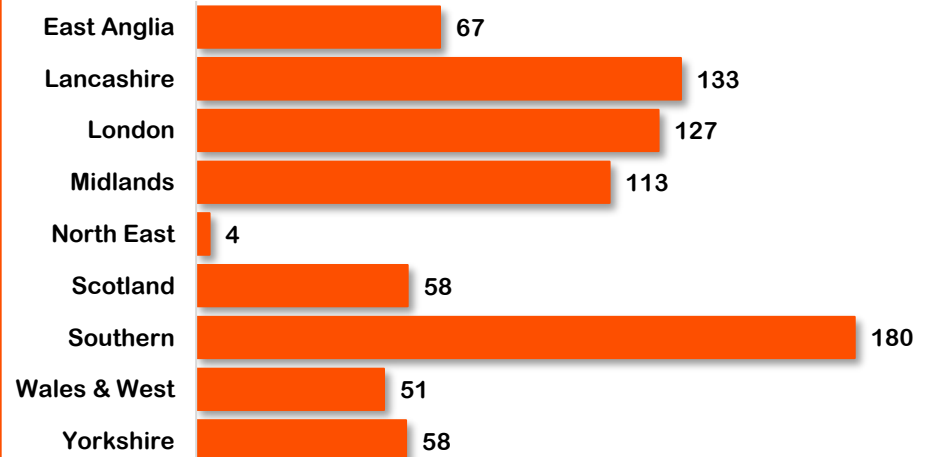
Targeting:

55+ years old &
C1. Lower Middle Class /
C2. Skilled Working Class

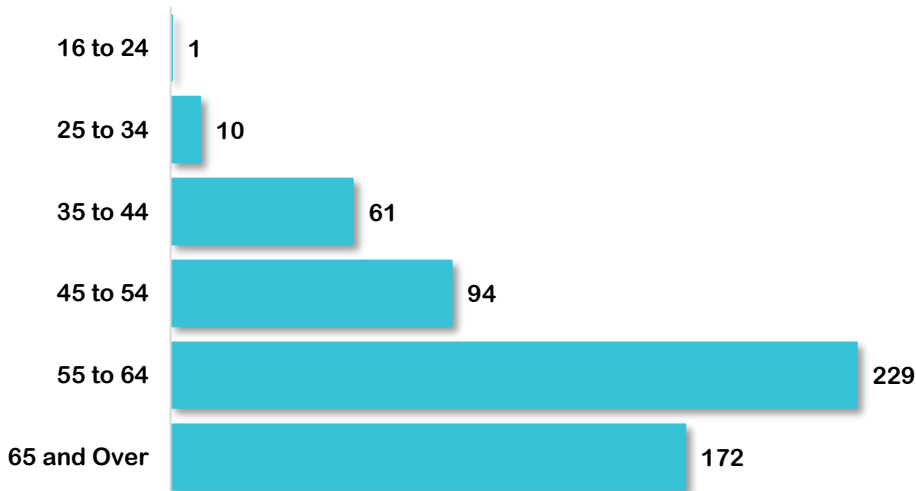
Geography:

Most likely Southern
Followed by Lancashire & London

BARB Regions



Age Group



Source: Ebiquity

Social Class



Oddbox: Target Audience Response

ODDBOX



Read On Average:
2.67 times

Remained In The Home For:
Up To 25 Days

Number Of Commercial
Actions Per Item:

Nearly Than 1 In 4 Items
(24%)

Retailer Industry

Read On Average:
3.04 times

Remained In The Home For:
Up To 27 Days

Number Of Commercial
Actions Per Item:
More Than 1 In 7 Items
(17%)

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

The Top 5 Retail Stores in H1 2022

Most Doordrop Volume in H1 2022

Retailer:



**H1 2022 Volume:
Vs. H1 2021:**

10 - 15m
(+234%)

4 - 6m
(+20%)

4 - 6m
(+25%)

4 - 6m
New User

2 - 4m
(+148%)

Category:

Retail

Retail

Retail

Retail

Retail

Biggest Growth in Doordrop Volume in H1 2022

Retailer:



**H1 2022 Volume:
Vs. H1 2021:**

10 - 15m
(+234%)

4 - 6m
New User

2 - 4m
New User

2 - 4m
(+942%)

2 - 4m
(+148%)

Category:

Retail

Retail

Retail

Retail

Retail

Boundary Mill Creative: Example



Weight:
10g

Message:
“Huge Savings for Everyone”

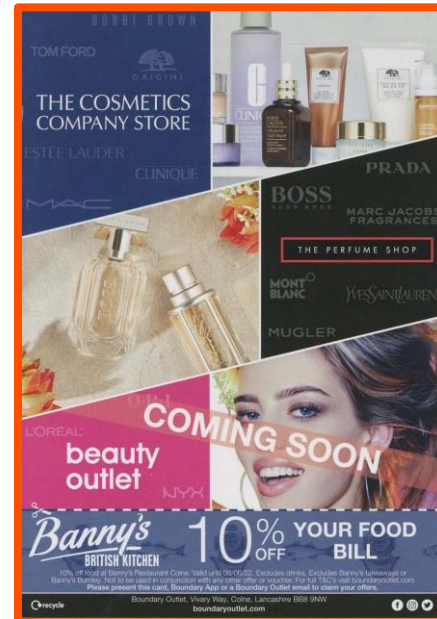
Incentive:
“Top Brands at Unbelievable Prices”

Response Type:
In Store

Market:
Retail: Household

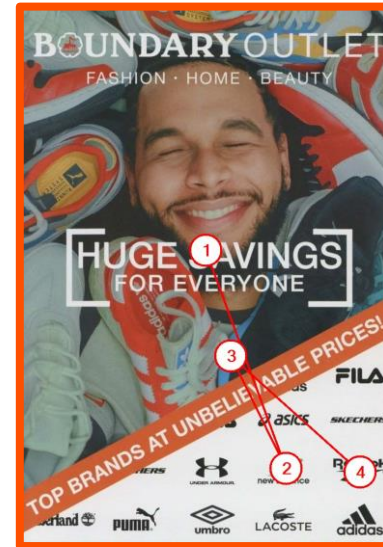
Month:
May 2022

Source: Ebiquity



whistl

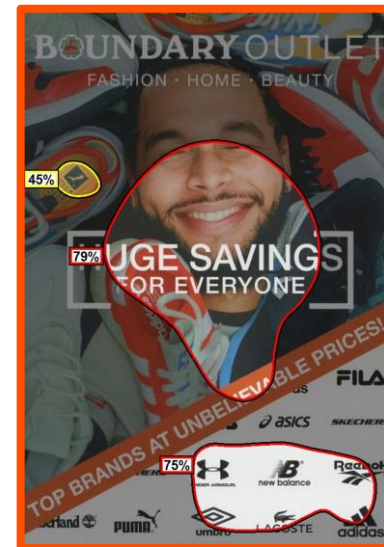
Boundary Mill - Front Creative: Analysis



The reader's main focus is drawn towards the face and the huge savings followed by the brand names.

The sequence of eye is moving from the middle of the creative to the bottom.

The logo is not noticed in the readers first glance. The lack of contrast with the background image is possibly having an impact on this.



Boundary Mill Creative: Target Audience



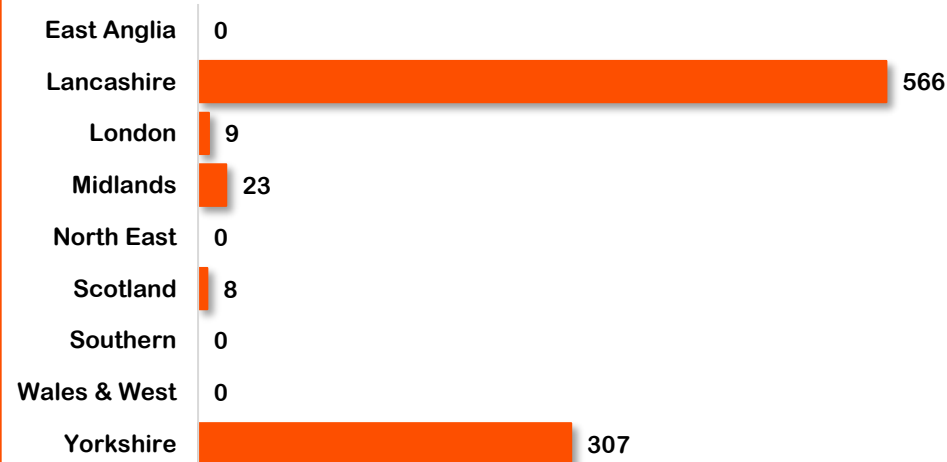
Targeting:

55+ years old &
DE. Working Class / Non Working
C1. Lower Middle Class

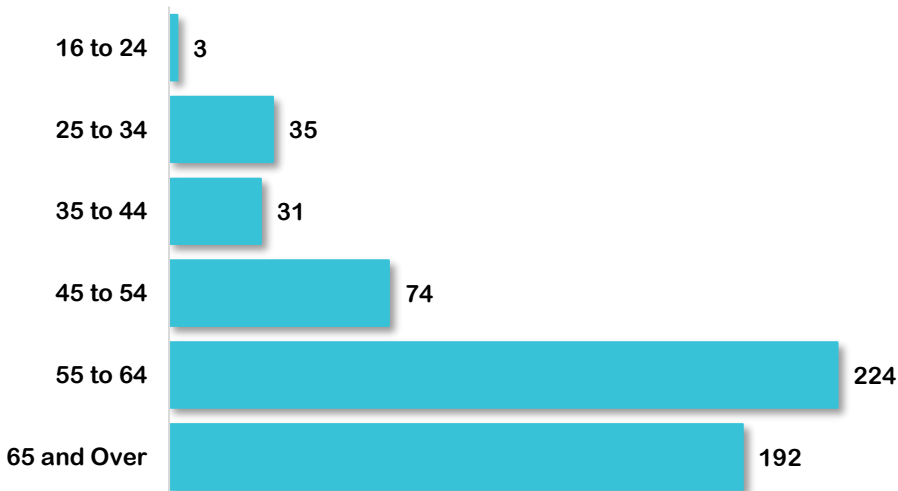
Geography:

Most likely Lancashire & Yorkshire

BARB Regions

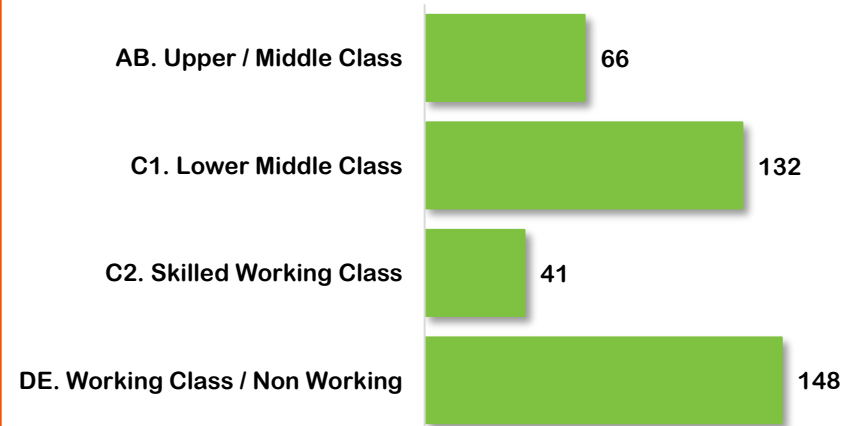


Age Group



Source: Ebiquity

Social Class



A Retail Success Story

Client: Anonymous

Campaign: Increase New
Customer
Acquisition

Category: Retail



**100% increase
in Response
Rate**



Campaign Objective

To improve Doordrop performance, the traditional drive time targeting was replaced by spend targeting analysis.

Each store undertook an exit poll and raw data was supplied to Whistl.

Whistl supplied recommended sectors to include in the Doordrop.

41 stores were covered with 2m Doordrops.



Campaign Results

Some stores saw an uplift of up to **40%** due to the Doordrop distribution.

Average sales uplift was **27%**.



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



- Experian Mosaic 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 buy red wine
 - I do my main shop at Tesco's
- Key lifestyles and attitudes, including:
 - Financial
 - Spending Habits
 - Hobbies and leisure activities

Thank you



**For further information or enquiries
please contact the team at Whistl:**

By Telephone: 01628 816 872

Or via our website: www.whistl.co.uk