



Charities Doordrop Market Intelligence Report January to June 2022

Contents

- **Ebiquity Overview by Category**
- **JIC Mail and the Household Journey**
- **Ebiquity Analysis**
- **Creative Examples**
- **Data Sources**

149m Doordrop Items Distributed in H1 2022

+77%

Doordrop
growth
in H1 2022

28

Health
Charities
NEW to
Doordrop

31%

Of Doordrop
volume from
Health
Charities

H1 2022

New Doordrop Users

<u>Category</u>	<u>No. of Charities</u>	<u>Volume (Millions)</u>	<u>Year on Year %</u>	<u>No. of Charities</u>	<u>Volume (Millions)</u>	<u>% 2022 Volume</u>
Animal Welfare	27	28m	+75%	9	1m	3%
Children	20	4m	-11%	7	600k	15%
Community	29	18m	+57%	7	500k	3%
Developing Countries	29	27m	+38%	8	1.7m	6%
Health	67	47m	+76%	28	2.9m	6%
Other	28	25m	+322%	12	1.5m	6%
Total	200	149m	+77%	71	8m	5%

Doordrops Household Journey



Seen By
156m
People

Charity

Volume: 149m

Reach: 1.05

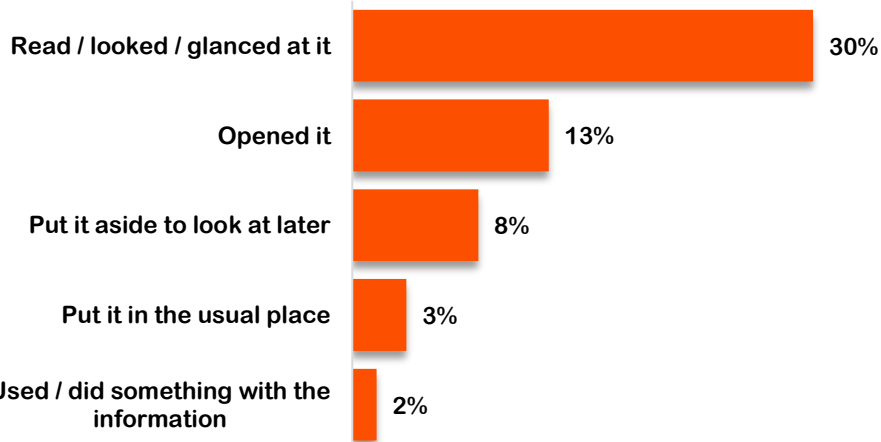
Frequency:
3.03



Read
472m
Times

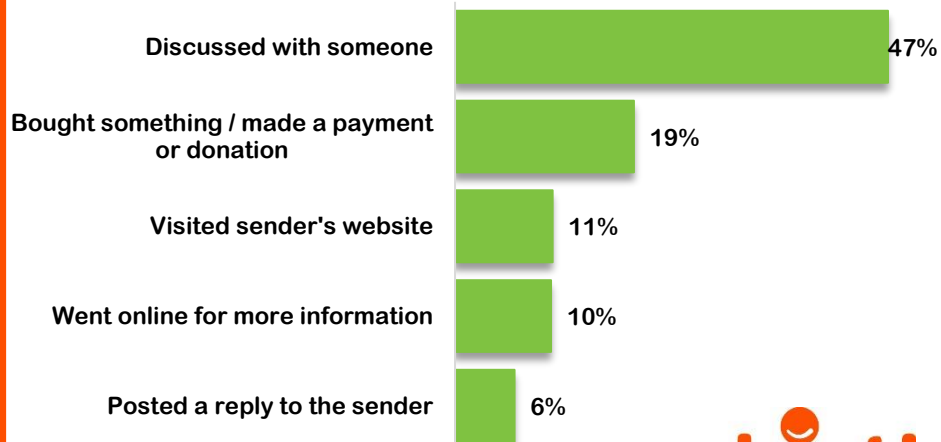
Physical Action

Proportion of Physical Actions



13% Resulted in a Commercial Action

Proportion of Commercial Actions



Competitive Periods in H1 2022

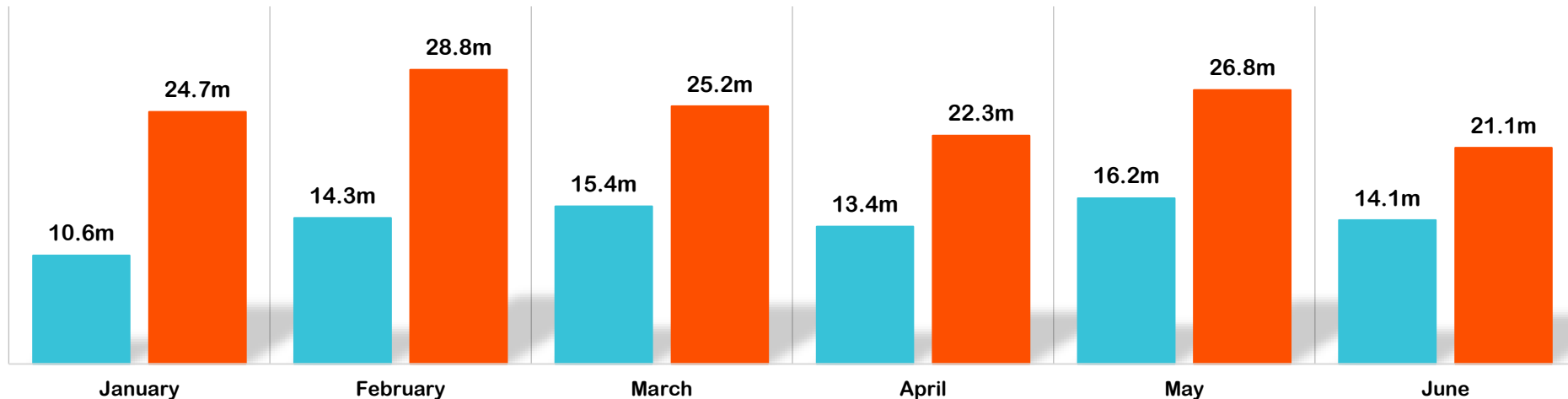
Charity
Doordrop
Volumes
by Month

+132%

YoY growth in
January as the
UK hopes to
emerge from
the pandemic

In 2022 the
monthly
volumes are
consistent
and show at
least 50% YOY
growth

■ H1 2021 ■ H1 2022

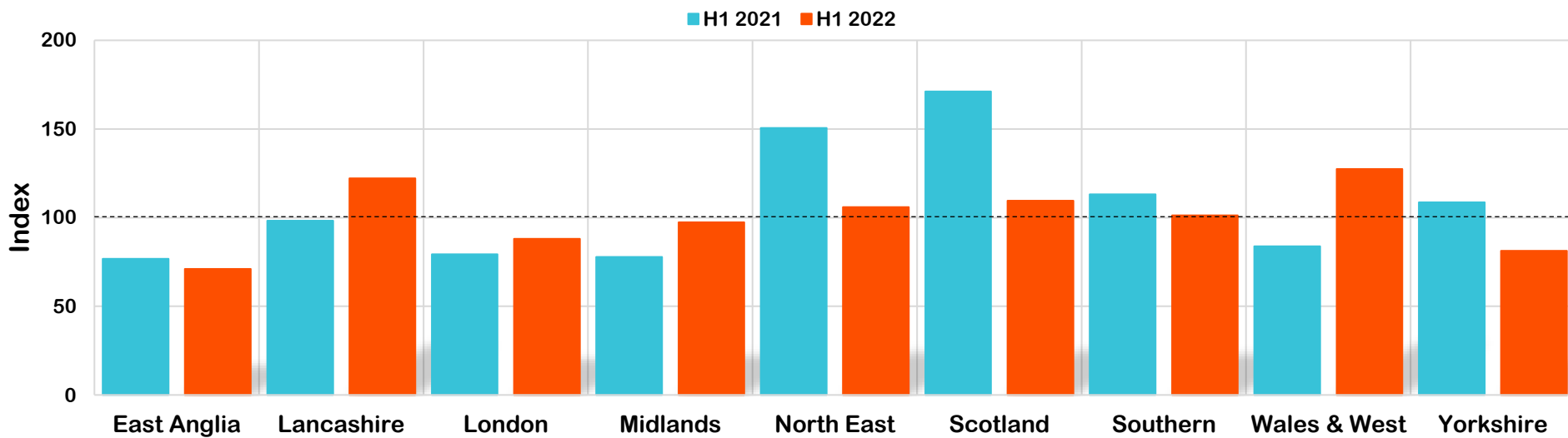


Where did Charities Reach Out To?

**H1 2022
Volume
Index by
Region**

**The most
competitive
regions in H1
2022:
Wales & West
Lancashire**

**Wales & West
(+185%)
Midlands (+137%)
& Lancashire
(+131%) saw the
largest volume
increases YOY**

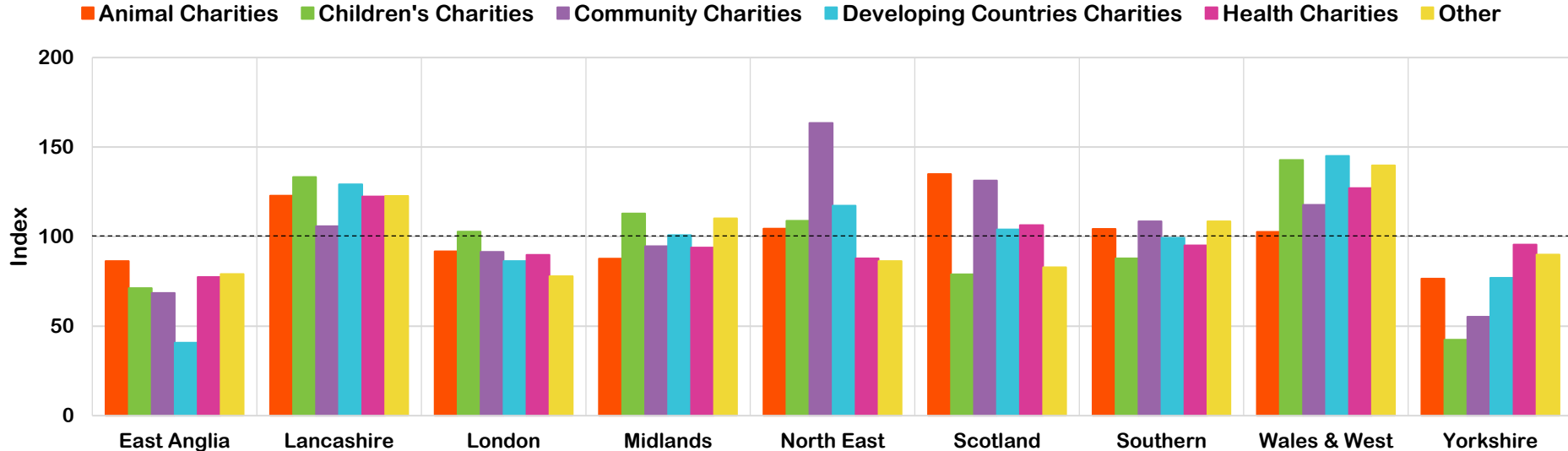


Where Charities Reached Out To In H1 2022

H1 2022
Volume
Index by
Region &
Charity
Sector

London
received the
most Charity
Doordrops
overall
30million

Lancashire
and Wales &
West were
targeted by
all the major
Charity
Sectors

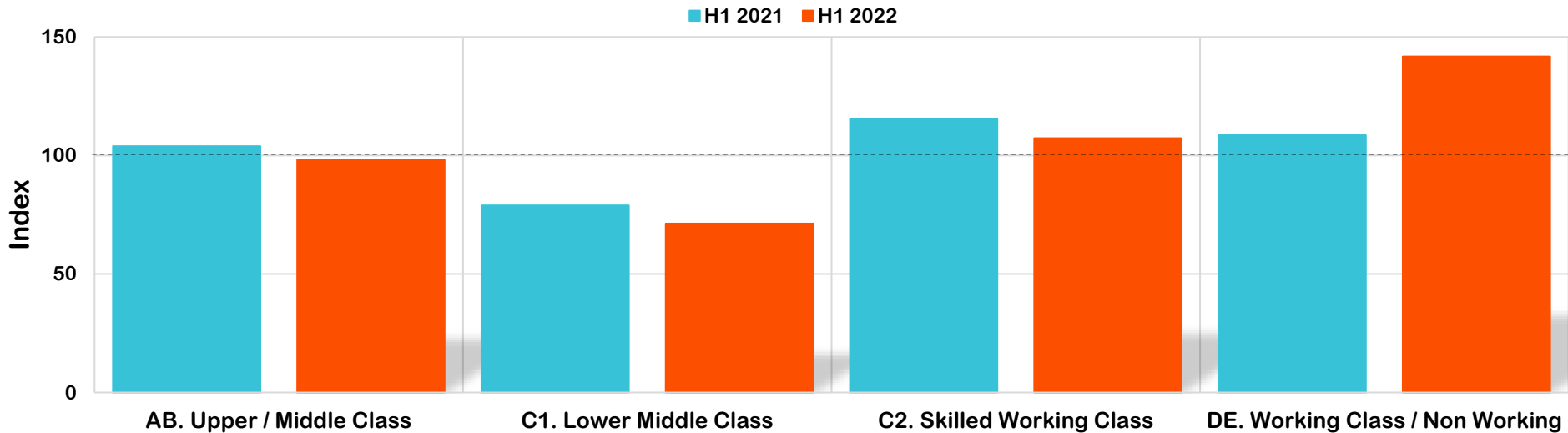


Who Are Charities Targeting?

**H1 2022
Volume
Index by
Social
Class**

DEs received
the biggest
increase in
terms of items
received
+120%

DEs
consistently
receive the
most
Doordrops
from Charities

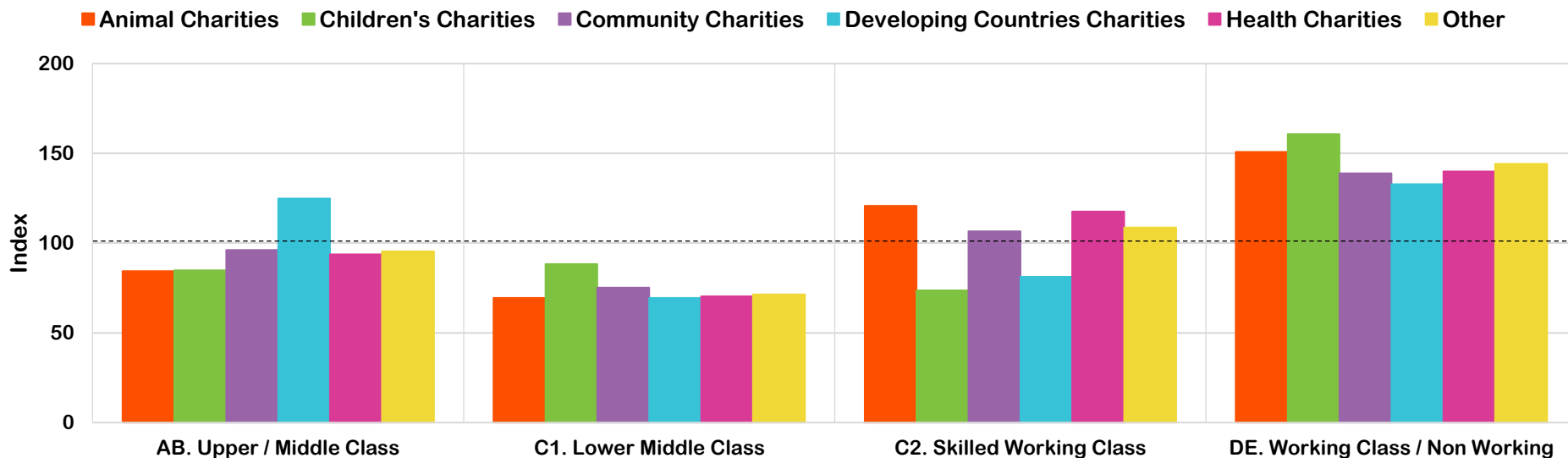


Who Are Charity Sectors Targeting?

H1 2022
Volume
Index by
Social Class
& Charity
Sector

All Charity
Sectors
target
DEs
(Working Class
/ Retired)

Charities
related to
Developing
Countries
focus on
targeting ABs

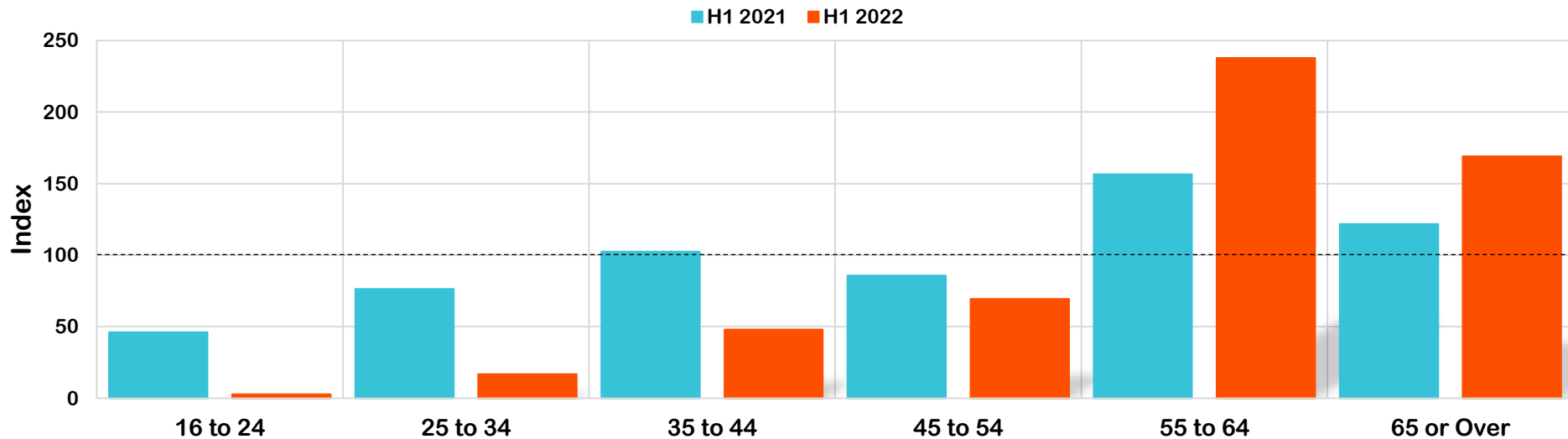


Who Are Charities Targeting?

**H1 2022
Volume
Index by
Age Group**

**78% of
Doordrop
Volumes are
targeted to the
older
generation
55+ year olds**

**YOY Doordrop
Volume
increases in
H1 2022:
55 to 64yrs old
+173%
65+yrs old
+169%**

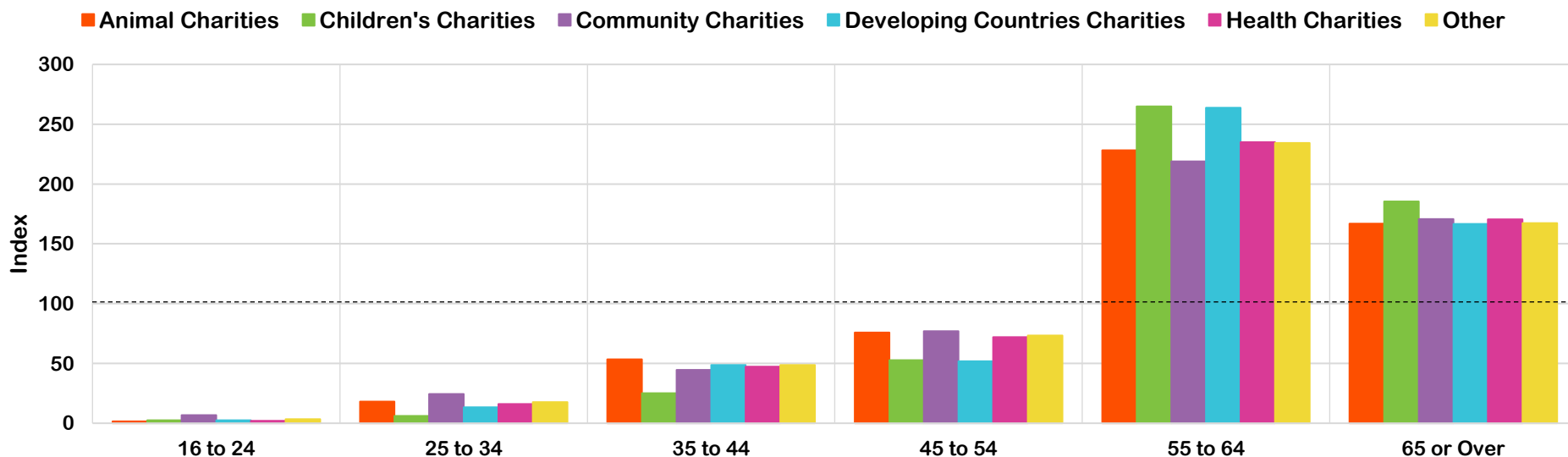


Who Are Charity Sectors Targeting?

H1 2022
Volume
Index by Age
Group &
Charity
Sector

All Charity
Sectors
target the
older
generation
55+ year olds

97% of
Doordrop
Volume
targeting
35+ yrs old



The Top 5 Charities in H1 2022

Most Doordrop Volume in H1 2022

Charity:



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

15 - 20m
(+555%)

10 - 15m
(+39%)

8 - 10m
(+13%)

8 - 10m
(+42%)

6 - 8m
(+119%)

Category:

Other

Health

Developing
Countries

Community

Animal

Biggest Growth in Doordrop Volume in H1 2022

Charity :



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

15 - 20m
(+555%)

4 - 6m
(+442%)

6 - 8m
(+119%)

10 - 15m
(+39%)

8 - 10m
(+42%)

Category:

Other

Health

Animal

Health

Community



Format:

4 page leaflet

Weight:

5g

Message:

“Enjoy nature, beauty and history with National Trust membership”

Creative Ask Type:

Membership Sign-up

Response Type:

**Telephone Number /
Online Sign-up**

Market:

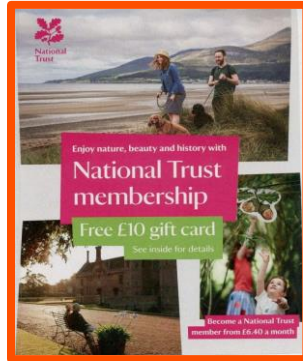
Charities: Environment

Month:

February 2022

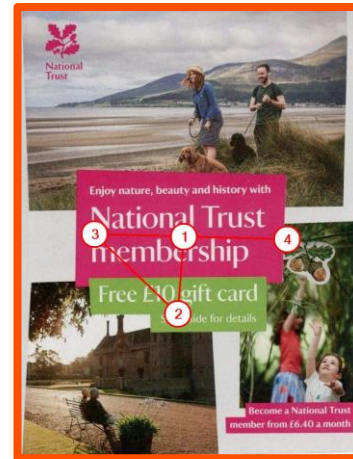


National Trust Creative: Analysis



The reader's main focus is the National Trust Membership with the offer of the free £10 gift card, the logo however does not get the viewer's gaze.

This is concentrated to the middle of the creative.



National Trust Creative: Target Audience



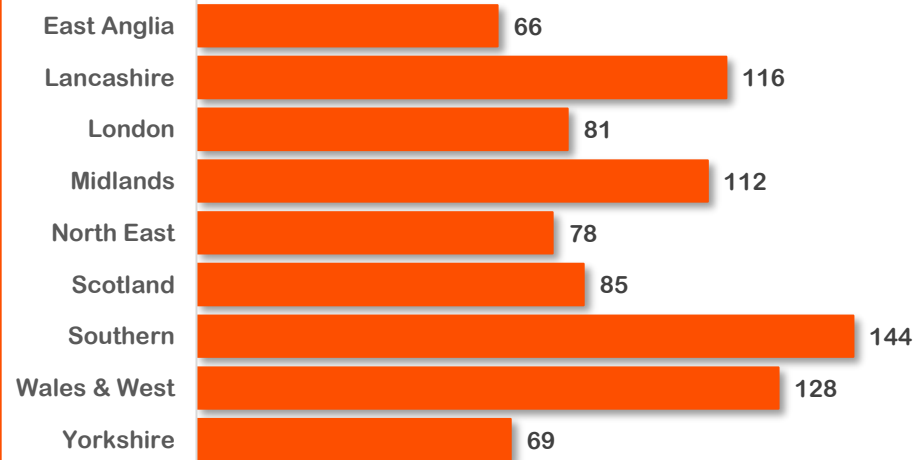
Targeting:

55+ years old &
AB. Upper / Middle Class

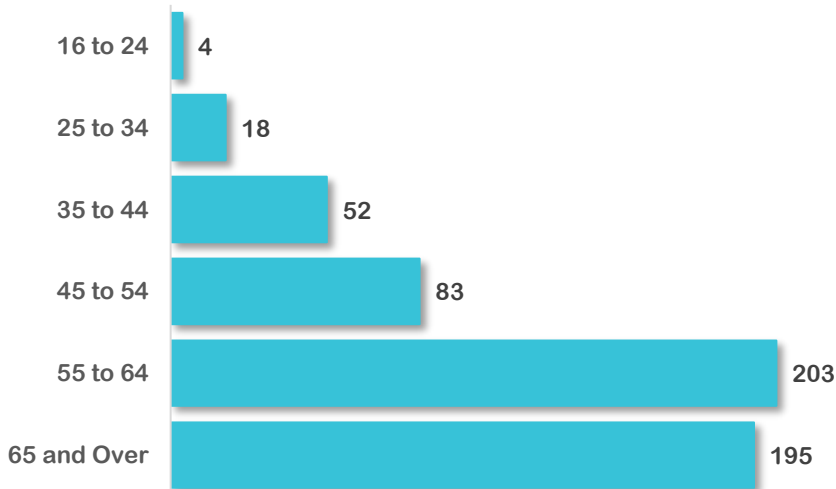
Geography:

Most likely Southern
Followed by Wales & West

BARB Regions

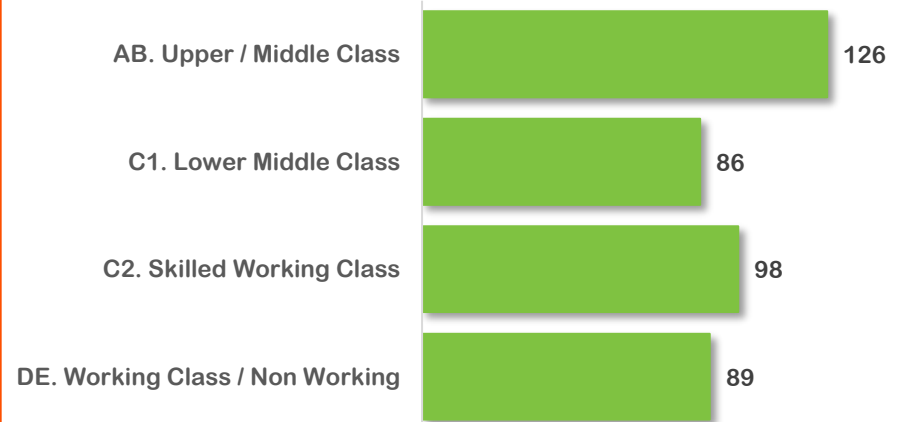


Age Group



Source: Ebiquity

Social Class



National Trust: Target Audience Response

Charity Industry

Read On Average:
3.05 times

Remained In The Home For:
Up To 26 Days

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

What Is Deemed As A Commercial Action:

- Made a Donation
- Discussed With Someone
- Visited Senders Website
- Went Online For More Information
- Called The Sender
- Posted A Reply To The Sender



A Charity Success Story

Client: The Royal British Legion

Campaign: Remembrance Day

Category: Charity



**£1.15 Return
on
Investment**



Campaign Objective

Remembrance Day is a very mature, so the Royal British Legion have to work creatively to recruit new supporters, particularly among younger age groups.

The 11-11-11-11 campaign was designed to reflect on past and modern-day conflicts to resonate with a broad spectrum of consumers.



Campaign Results

This momentous and highly targeted campaign recruited more than **28,700** new supporters, generating income totalling **£2.5 million**.

Post-campaign analysis revealed that a high proportion of new supporters were in their 50s or younger, answering one of the Royal British Legion's key objectives.

Cold activity was profitable from the outset, with an ROI of **£1.15**, while warm activity achieved a return of almost **£6** per £1 spent.

Over **80,000** card poppies were contributed to the display field.





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 have donated to Charity in the last 12 months
 - I have donated more than £250 in the last 12 months
- 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