

Wednesday 10 July
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/ Webinar: Exploring the relative advantage of Door Drops

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/ Welcome

Kelly O'Sullivan, CEO, Webmart

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/ The Door Drop Report 2024

Ian Gibbs, Insight and Planning Director, DMA and Data Leadership
and Learning, JICMAIL

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Door Drops Report 2024

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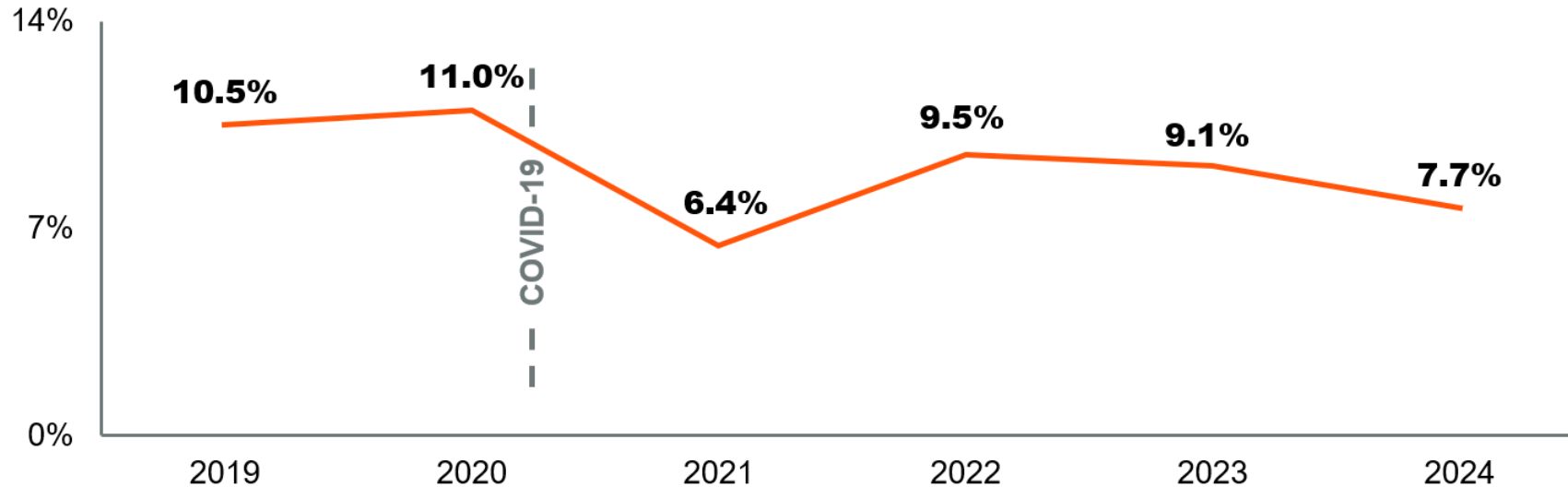
**JiC
MAIL**
Mail Media Metrics

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/ Marketers are being asked to do more with less

Average Budgets Fall to Post-Pandemic Low

2024 Marketing Budget as a Percent of Total Revenue



n = 395 (2024); 410 (2023); 400 (2021); 342 (2020); 342 (2019); 618 (2018); 350 (2017); 375 (2016) CMOs, Excluding "Don't Know"

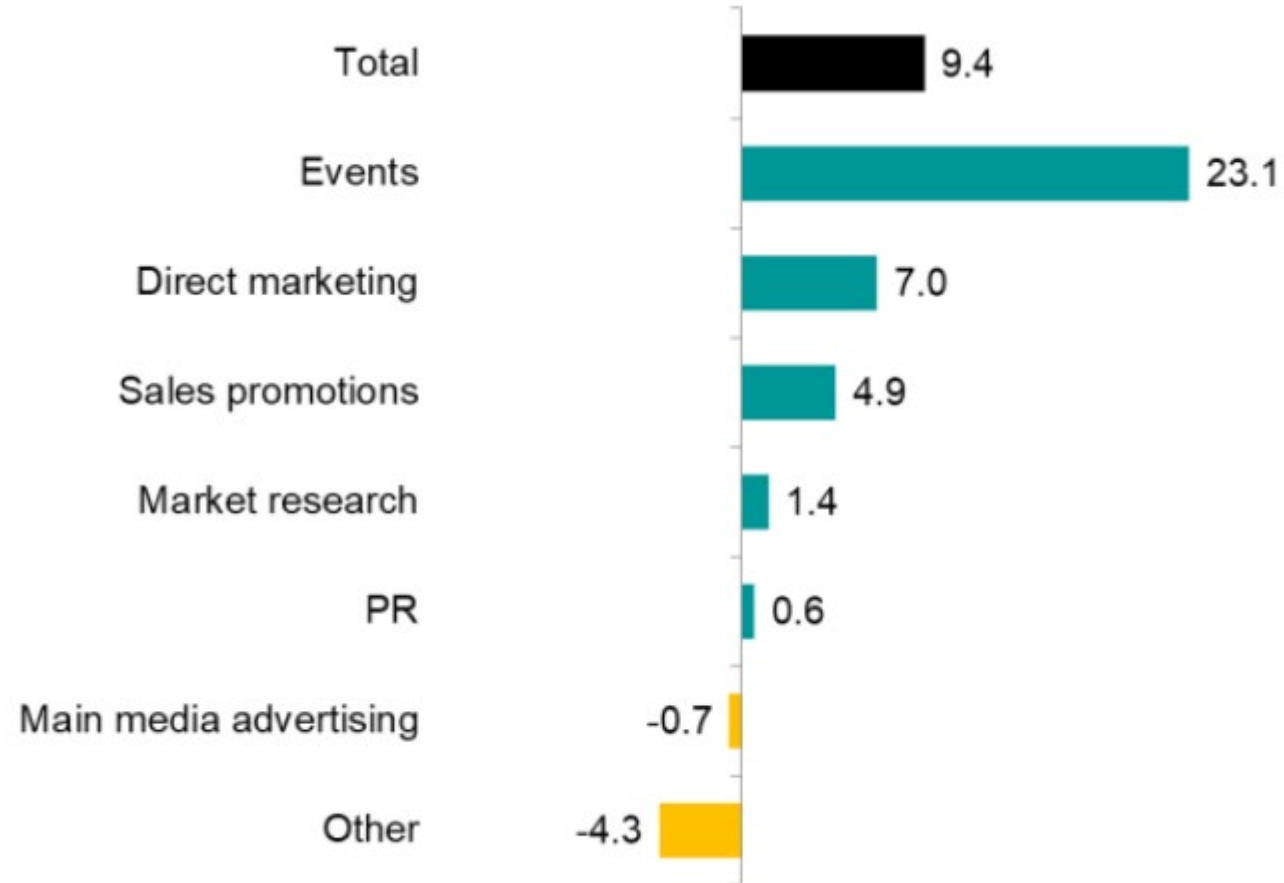
Q. What percentage of your revenue is being allocated to your total marketing expense budget in 2022?

Source: 2024 Gartner CMO Spend Survey

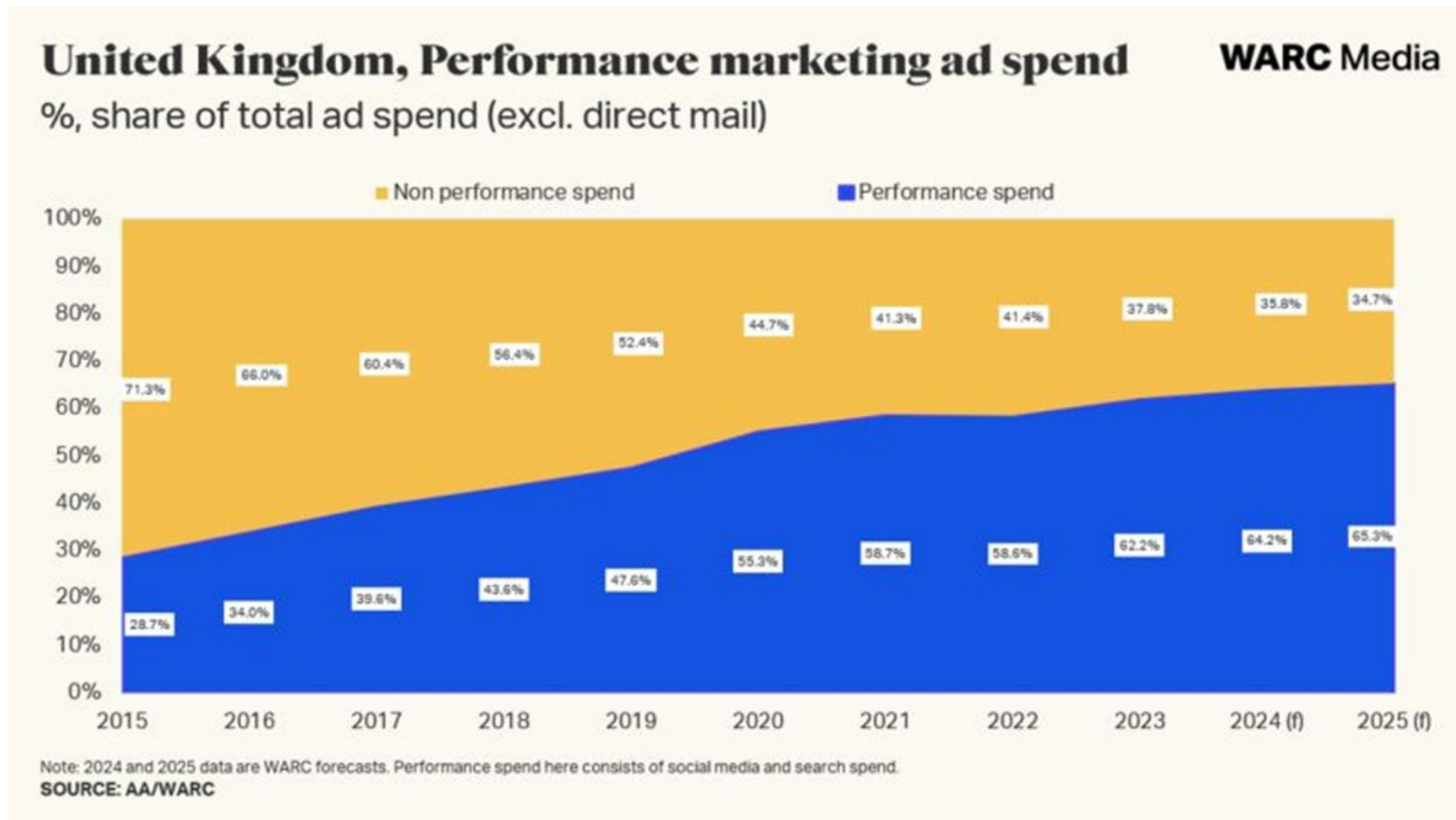
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/ Direct marketing spend predicted to increase by Bellwether

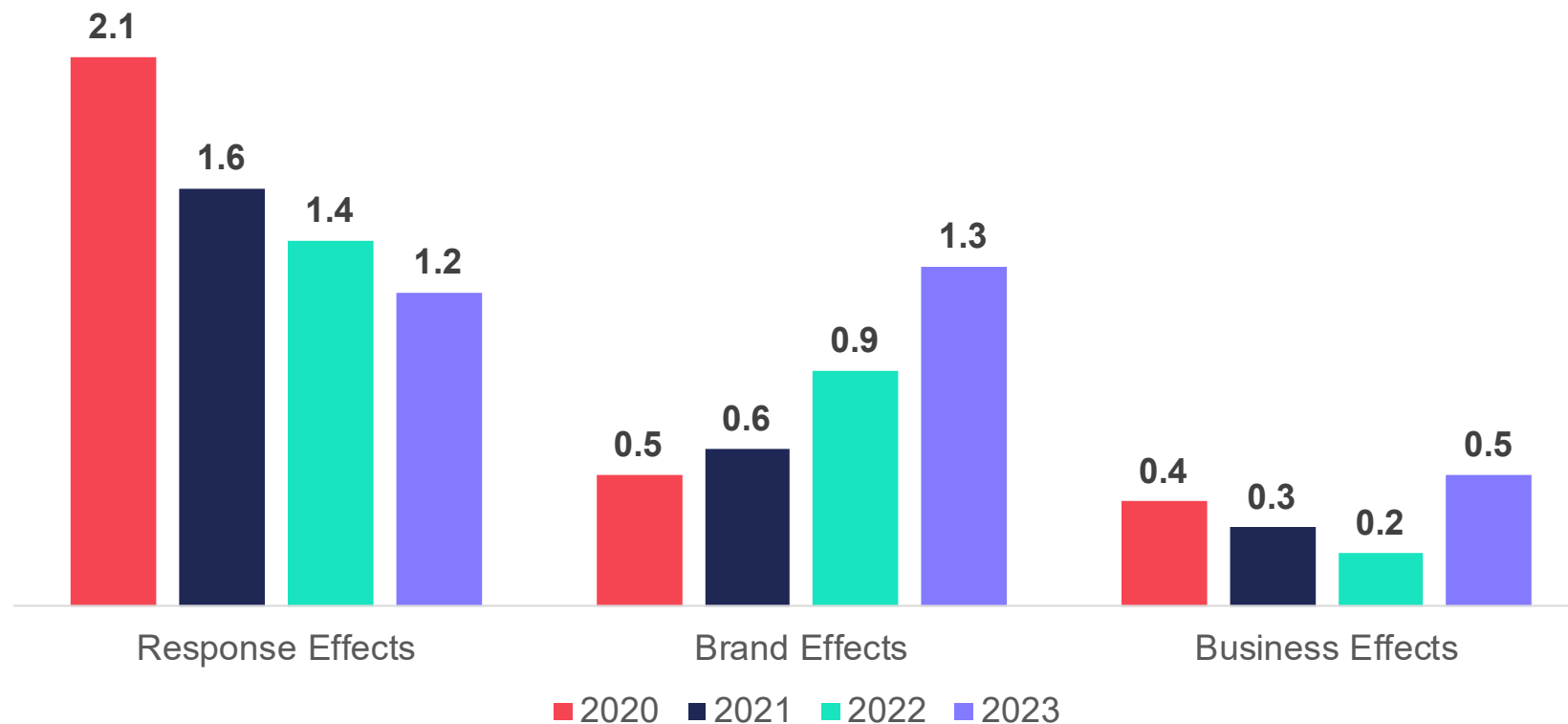


/ Performance marketing accounts for the lion's share of ad spend



/ Yet the crisis in performance marketing effectiveness deepened in 2023

Number of Effects Per Campaign Over Time

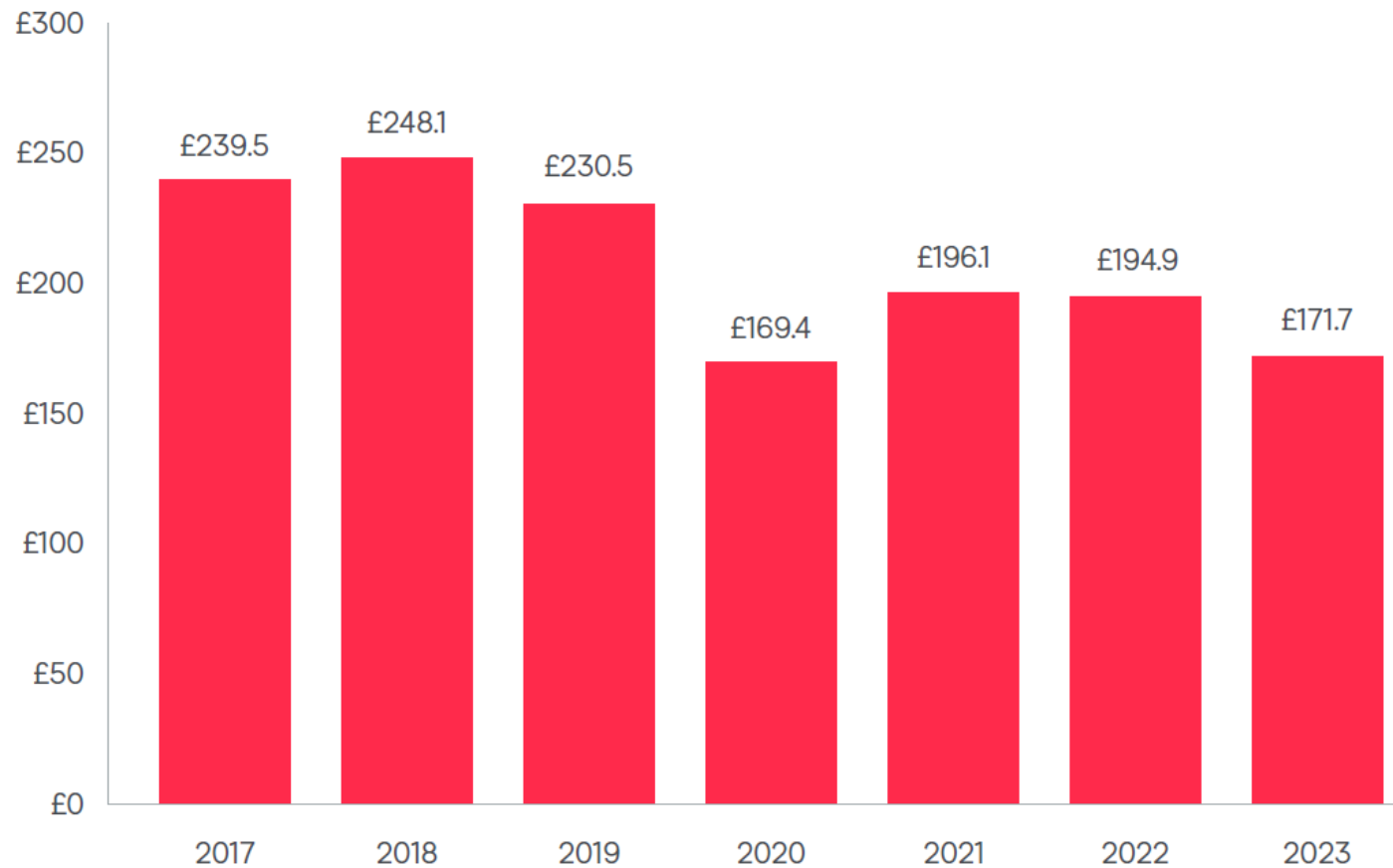


/ Ten Key Insights from the Door Drop Report 2024



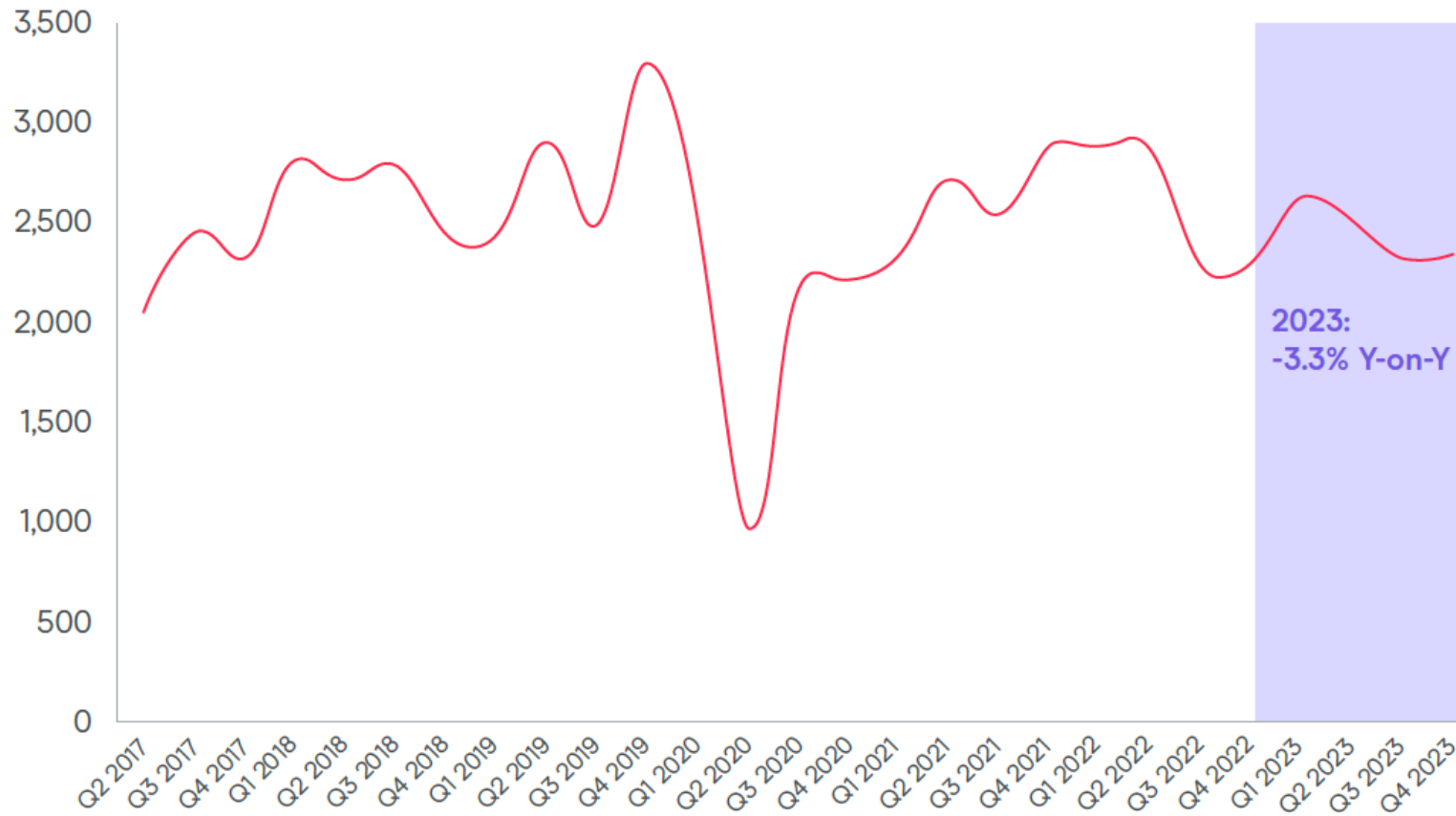
/ 1. Door drop market revenue down year on year

Yearly Expenditure (millions of pounds)



/ 2. Volumes down only marginally on the JICMAIL panel

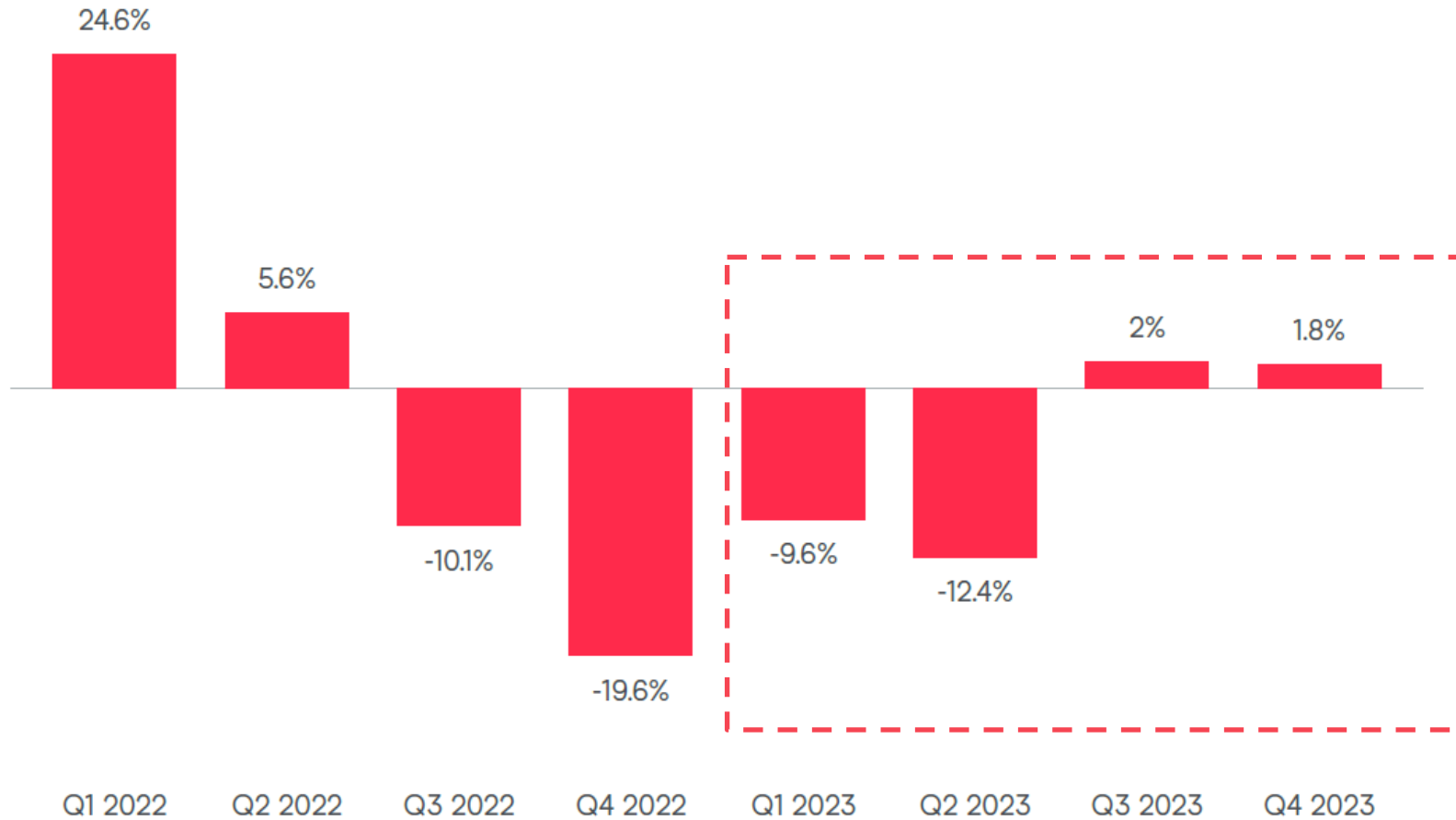
JICMAIL Door Drop Volumes (Q2 2017 to Q4 2023)



Source: JICMAIL Item Data Q2 2017 – Q4 2023 Door Drops = 67,241 items

/ 3. A year of two halves

JICMAIL Door Drop Volumes Year-on-Year Change (Q1 2022 to Q4 2023)



Source: JICMAIL Item Data Q2 2017 – Q4 2023 Door Drops = 67,241 items

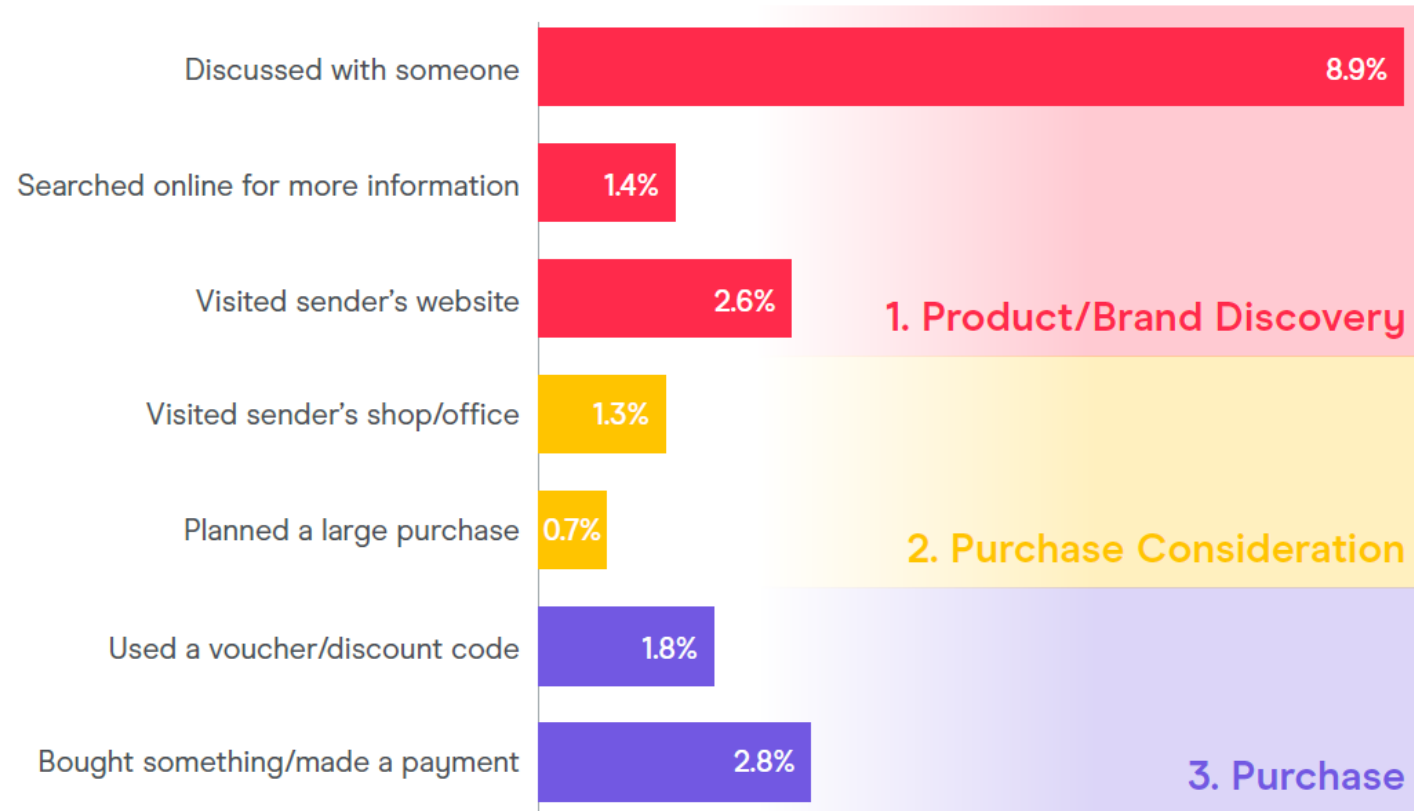
/ 4. More advertisers are using Door Drops

+3%

growth year-on-year in the number of advertisers using Door Drops on the JICMAIL panel

/ 5. Full funnel effects with Door Drops

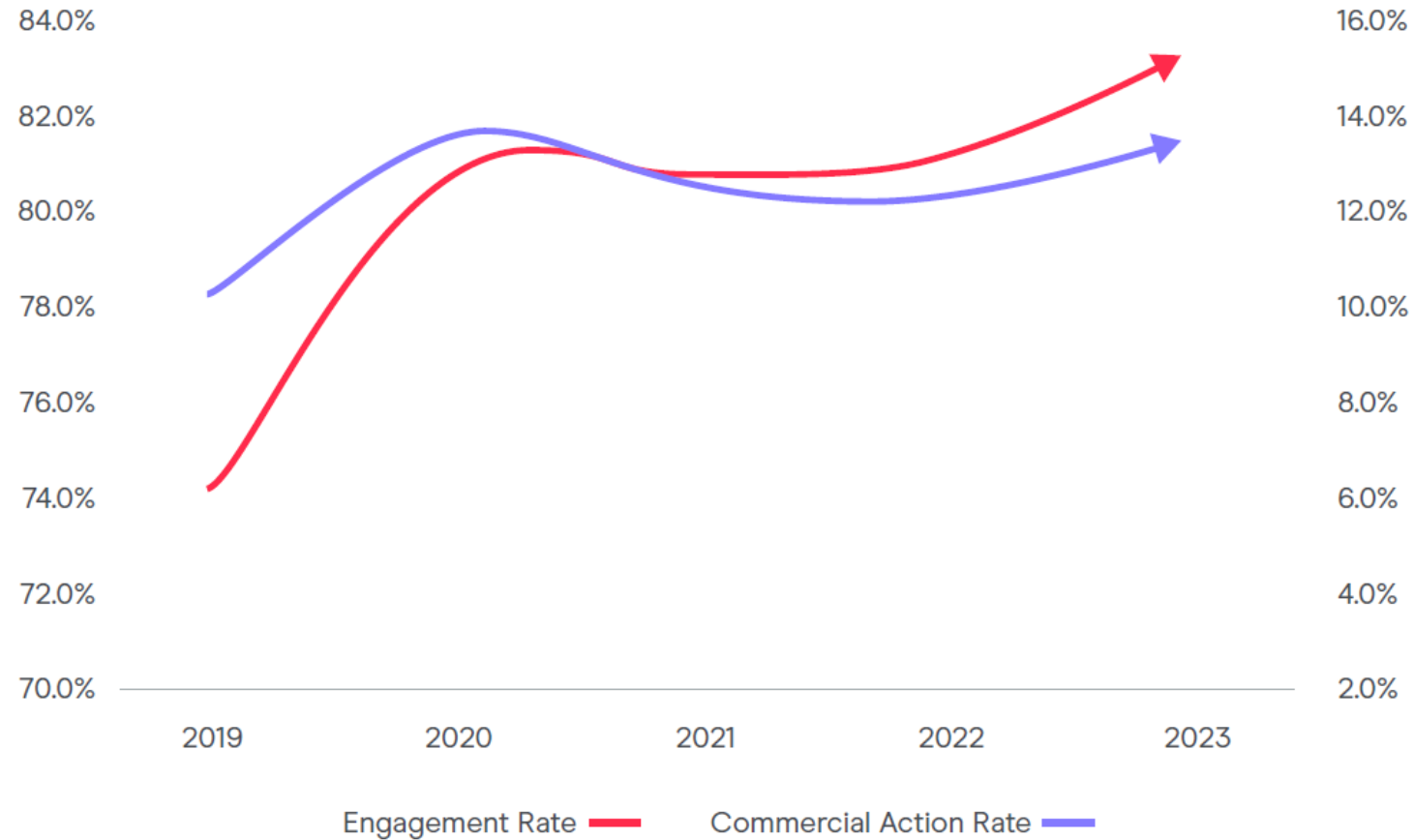
Door Drop Commercial Actions (% of mail items)



Source: JICMAIL Item Data Q1 2023 – Q4 2023 Door Drops = 9,808 items

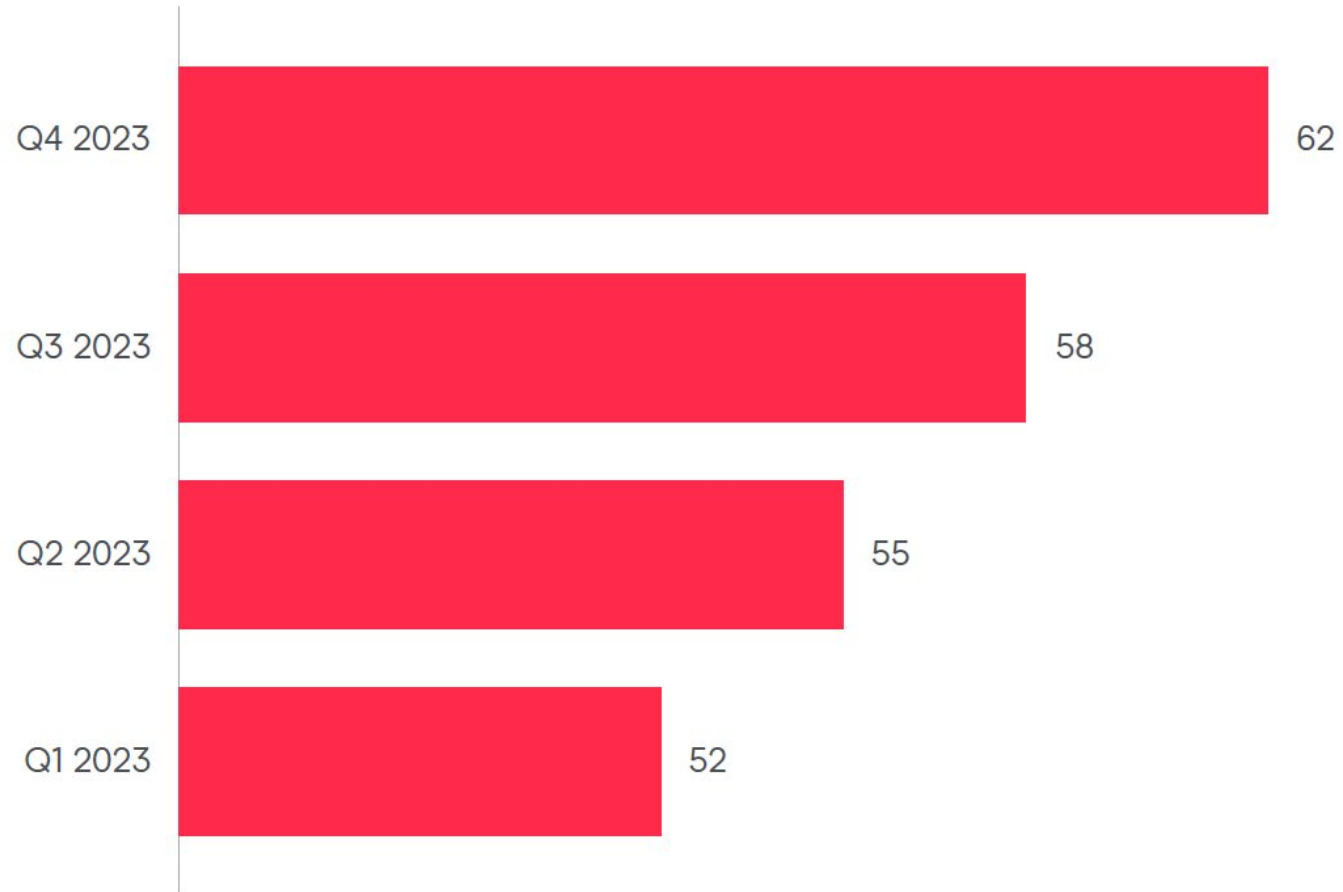
/ 6. Effectiveness and engagement are growing

Door Drop Engagement vs Effectiveness



/ 7. Attention is growing

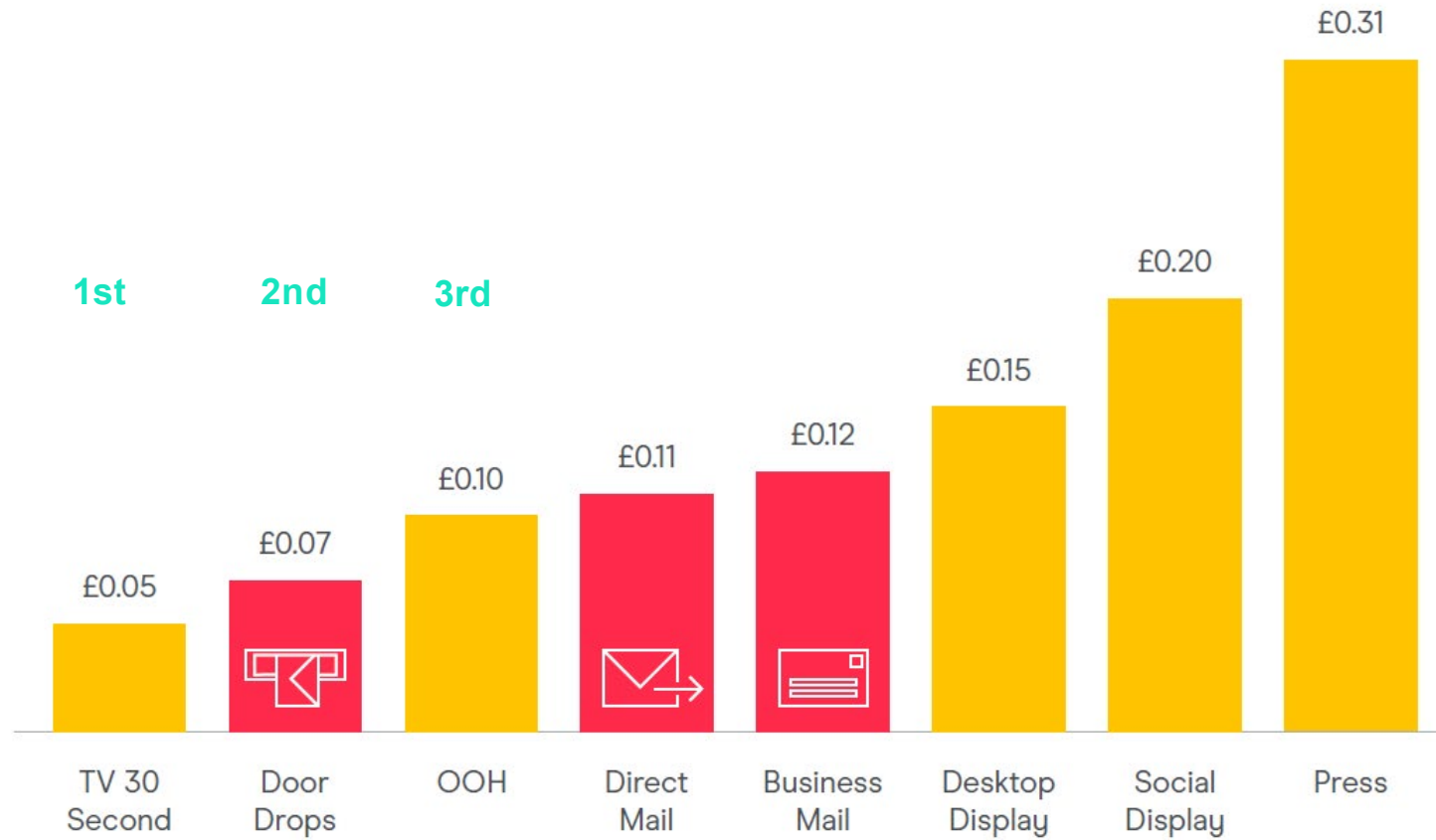
Door Drop Attention: seconds spent per item across 28 days



Source: JICMAIL Item Data Q1 2023 – Q4 2023 Door Drops = 9,808 items

/ 8. Among the most attention efficient channels

Door Drop Attention Efficiency: Cost per Minute of Attention as of Q1 2024 (ABC1 Adults)



Source: JICMAIL Item Data Q1 2024; Lumen; TVision; 7Stars 2023 CPM data. Note: Attention is measured using an eye-tracking methodology for all channels apart from mail. Mail attention is a claimed metric measured using the JICMAIL diary survey and verified by observed video analytics data. Viewability and % Viewed metrics have not been taken into account as standard across this analysis. OOH data based on roadside only.

/ 9. Performance benchmarks available

Door Drop Response Rate Tracker Benchmarks 2023

0.6%

Response Rate

£2.60

ROI

£201.5

CPA

Source: JICMAIL Response Rate Tracker 2023, n=250 Door Drop campaigns

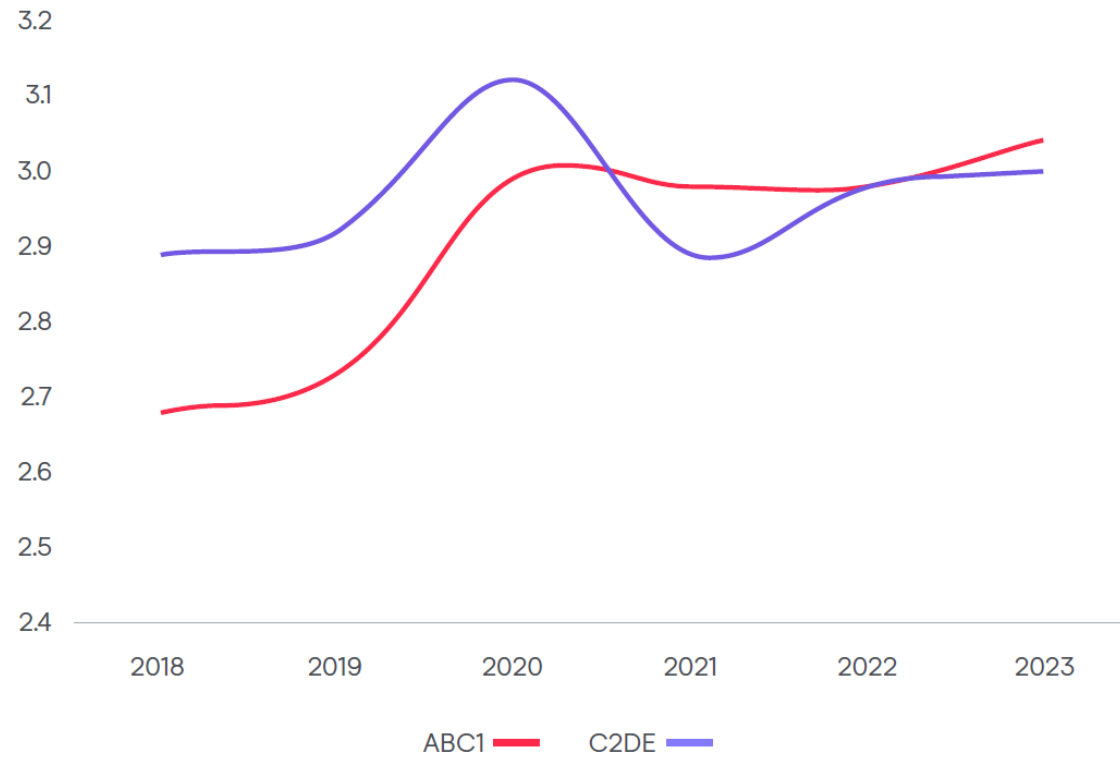
/ Broad / indicative comparisons look good

	% of advertising investment	% of profit volume				Full payback ROI	Short-term ROI
		% of full payback	% of sustained payback	% of short-term payback	% of immediate payback		
All media	100%	100%	100%	100%	100%	£4.11	£1.87
TV (Linear + BVOD)	43.6%	54.7%	64.3%	41.5%	27.8%	£5.61	£1.79
Linear TV only	35.0%	46.6%	55.7%	33.9%	20.5%	£5.94	£1.82
Generic PPC	18.9%	14.6%	8.8%	22.5%	30.5%	£3.52	£2.29
Paid Social	13.2%	9.4%	8.0%	11.4%	15.1%	£3.20	£1.62
BVOD only	8.6%	8.2%	8.6%	7.6%	7.3%	£4.25	£1.66
Audio	6.2%	6.9%	6.0%	8.2%	8.6%	£4.98	£2.47
Print	3.3%	4.8%	4.7%	4.9%	4.8%	£6.36	£2.74
Online video	3.9%	3.4%	3.2%	3.7%	3.6%	£3.86	£1.76
OOH	5.0%	3.1%	3.0%	3.1%	3.3%	£2.78	£1.19
Online display	5.5%	2.9%	1.8%	4.4%	5.9%	£2.34	£1.50
Cinema	0.4%	0.3%	0.2%	0.3%	0.3%	£2.56	£1.19

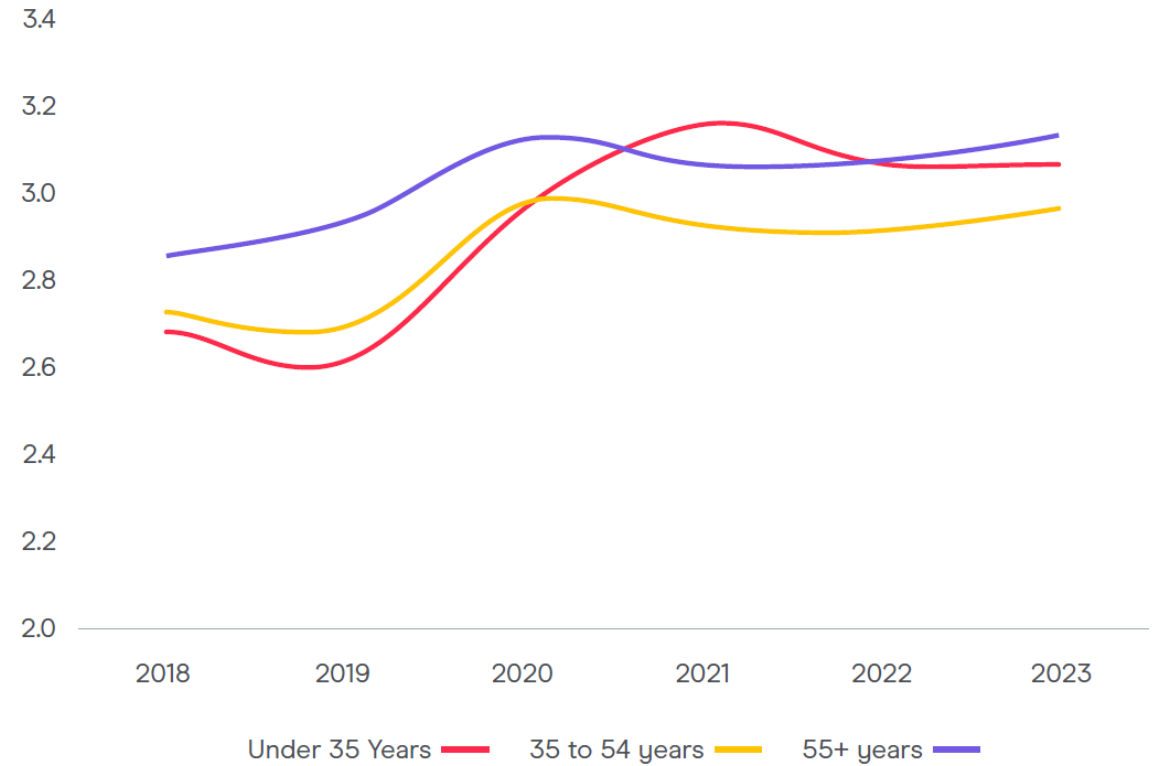
Source: Profitability 2

/ 10. Upmarket audiences engage

Door Drop frequency by household social grade



Door Drop frequency by household co-ordinator age



/ Key takeaways

1. The **number of advertisers using Door Drops increased by 3%** in 2023 as the channel continued to evolve into a more targeted, effective and efficient advertising medium.
2. While the Door Drop channel experienced declining volume and spend in 2023, JICMAIL panel data reveals that these **declines were mainly confined to the first half of the year** – and the shockwaves resulting from industrial action in the postal sector softened as the year progressed.
3. The **commercial effectiveness of Door Drops increased** in 2023. These included the key metrics of purchases and payments made, which rose from 2.3% of items in 2022 to 2.8% in 2023.
4. Time spent with items - JICMAIL's attention metric - increased steadily during 2023. By Q4, time spent per item across 28 days had reached **62 seconds for the average Door Drop**.
5. Using campaign-centric data from the JICMAIL Response Rate Tracker, Door Drops across all sectors are revealed to have an average response rate of 0.6%; **ROI of £2.60**; and CPA of £201.50.

/ Panel discussion: Volume, Value and Confidence

Christian Peterson, Product Manager, Royal Mail Group

Neal Dodd, Managing Director, The Letterbox Consultancy

Jayne Raynsford, Director of Commercial, Whistl

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/ Panel discussion: Effectiveness and Impact

Tom Ridges, CEO and Founder, Herdify

Megan Baker, Marketing Manager, RSPCA

Ben Briggs, Managing Partner, We Join the Dots

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/ Closing comments

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/ Key Dates 2024

Entries open – Monday 1 July

Early bird deadline – Friday 26 July

Entries close – Friday 13 September

Late entry deadline – Friday 20 September

Shortlist Party – Thursday 10 October

DMA Awards Night – Tuesday 3 December

/ Feedback Link

