



Door Drop Volumes 2011 A Pan-European View

May 2013



Introduction to ELMA

- ELMA was founded in 1990
- Dedicated to supporting best practice in door drop marketing across Europe
- Represents 21 markets across Europe
- Provides advertisers with access to over 180m households
- Provides employment for over 130,000 people across Europe

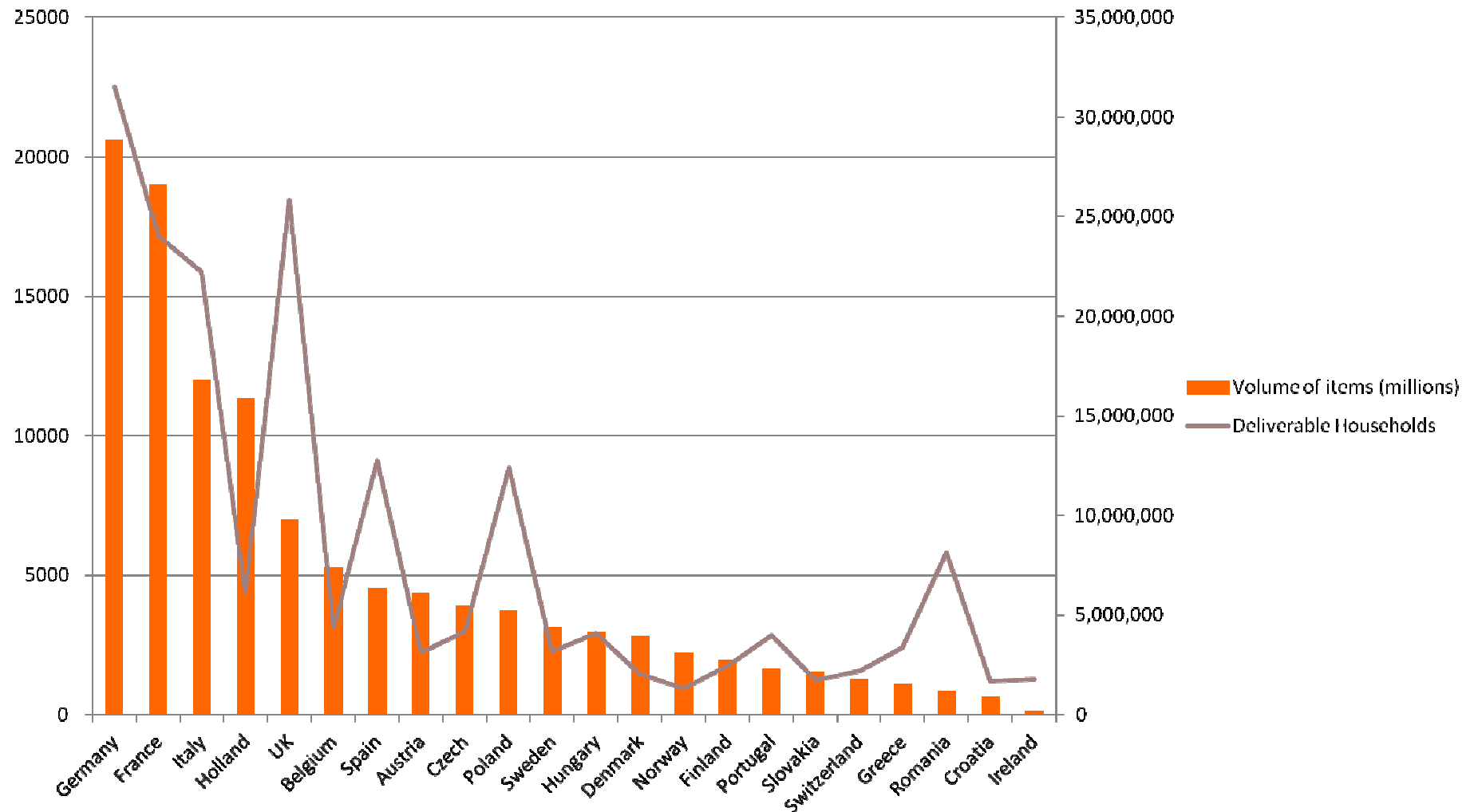


Overview

- In 2010 ELMA ran the most comprehensive survey of European door drop activity ever
- This report constitutes an update of that report to cover 2011. 22 markets contributed to the survey this year making it the largest ever.
- Objectives were:
 - to quantify the total size of the door drop market in terms of spend and volume
 - to understand if there are any notable trends



Overview



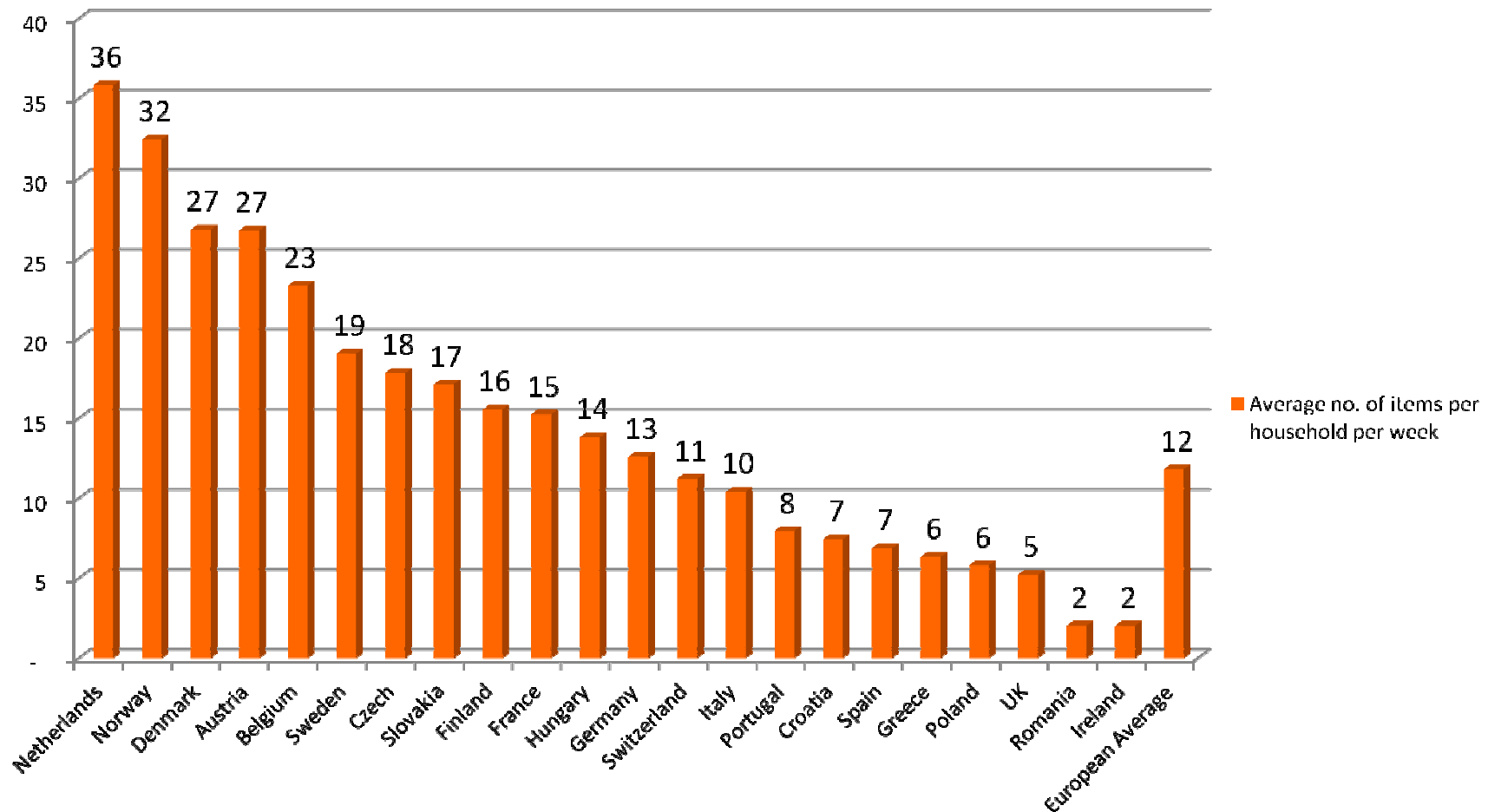
Around 112 billion items were distributed across Europe in 2011

Source: ELMA



Average Number of Items Received

Average no. of items per household per week

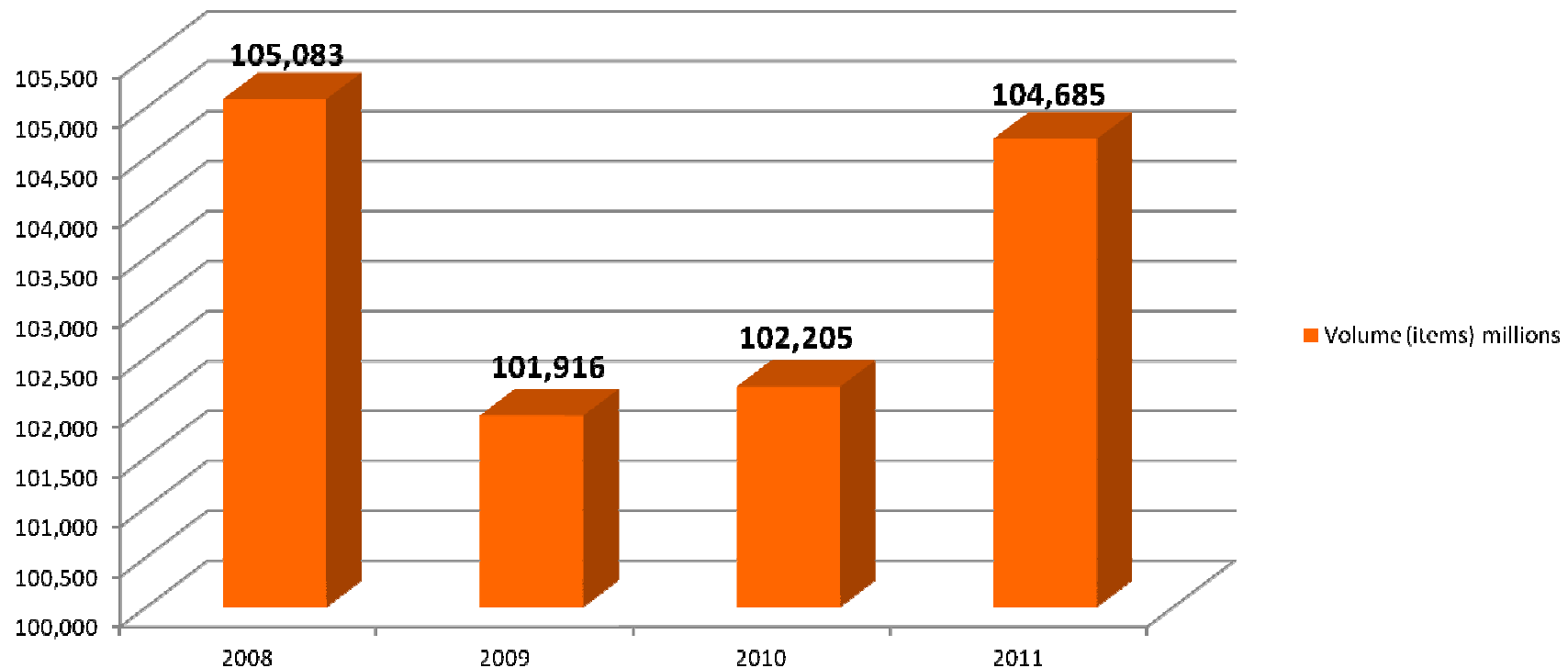


Source: ELMA



Trend Analysis

Total Market Volume 2008 - 2011



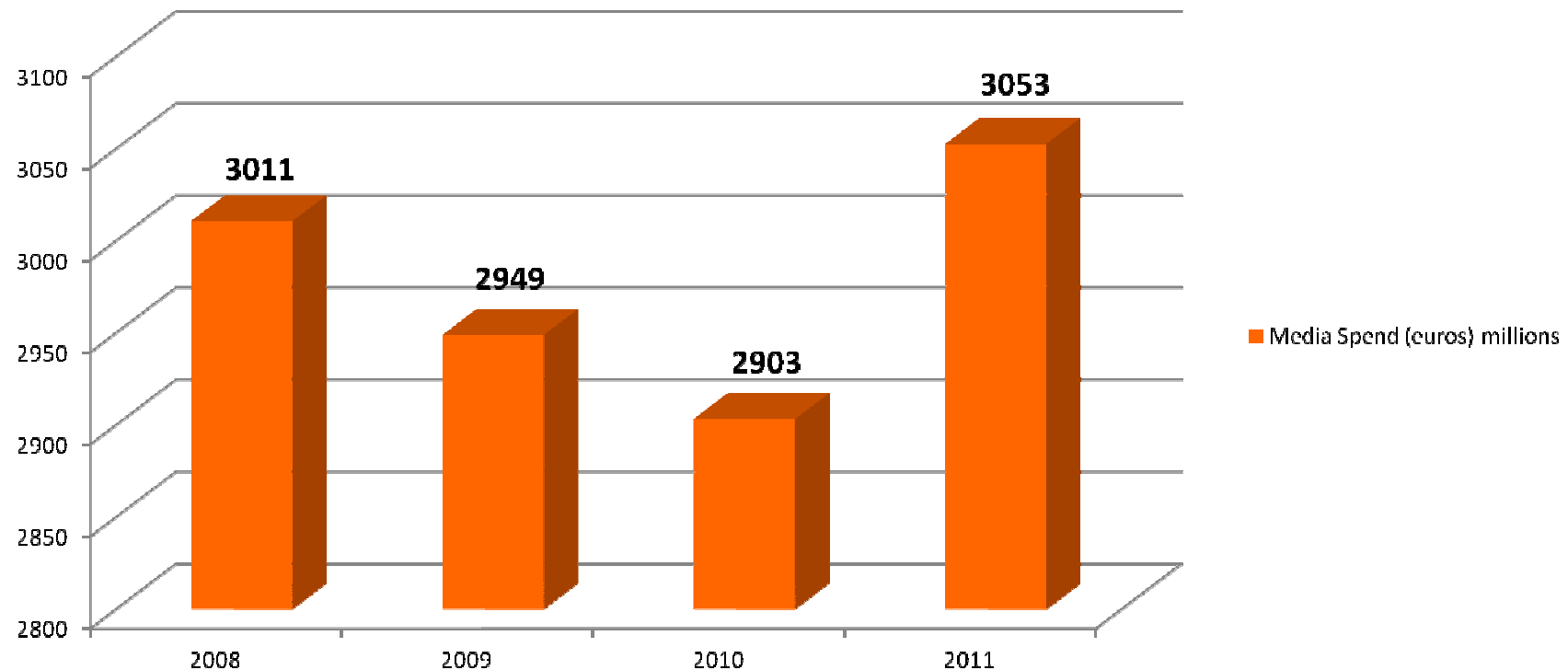
18 members were able to provide volume data for a four year period to establish trends in volumes across the recent economic downturn

Source: ELMA – 18 markets



Trend Analysis

Total Market Expenditure 2008 - 2011



16 members were able to provide expenditure data for a four year period to establish trends in media spend across the recent economic downturn

Source: ELMA – 16 markets



Key Findings

- Total door drop volume across 22 markets is estimated at 112 billion items in 2011
- Total door drop media spend across 22 markets is estimated at €3.9bn in 2011
- This shows an increase in volume of 2.3% and in media spend of 4.9% compared to 2010
- This is a rebound following recessionary pressures on volumes and on prices in 2009 and 2010
- A significant demonstration of the door drop channel's resilience within an increasingly digital marketing mix



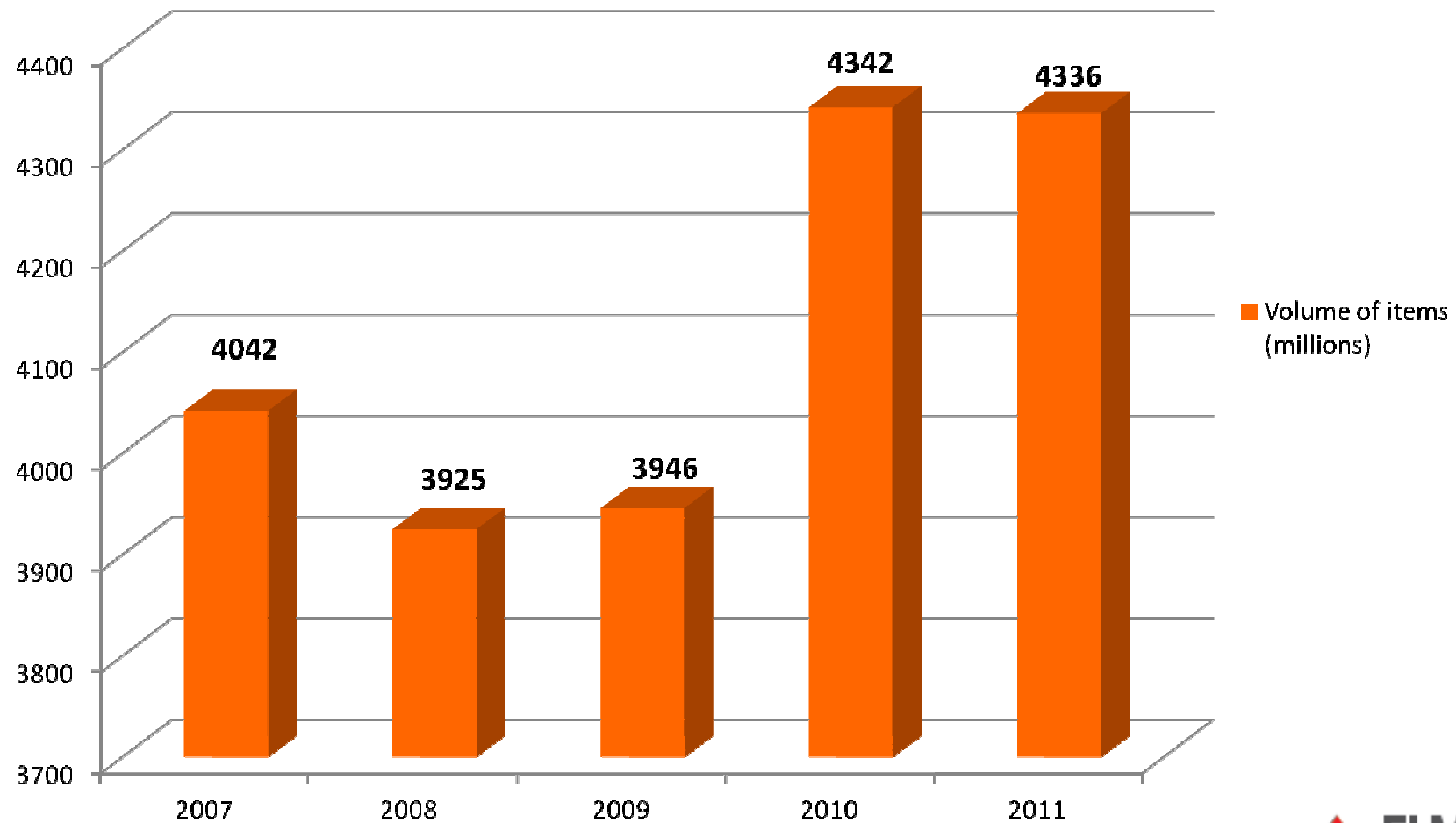
Appendix

Analysis by Market



Austria

Size of the Door Drop Market in Austria

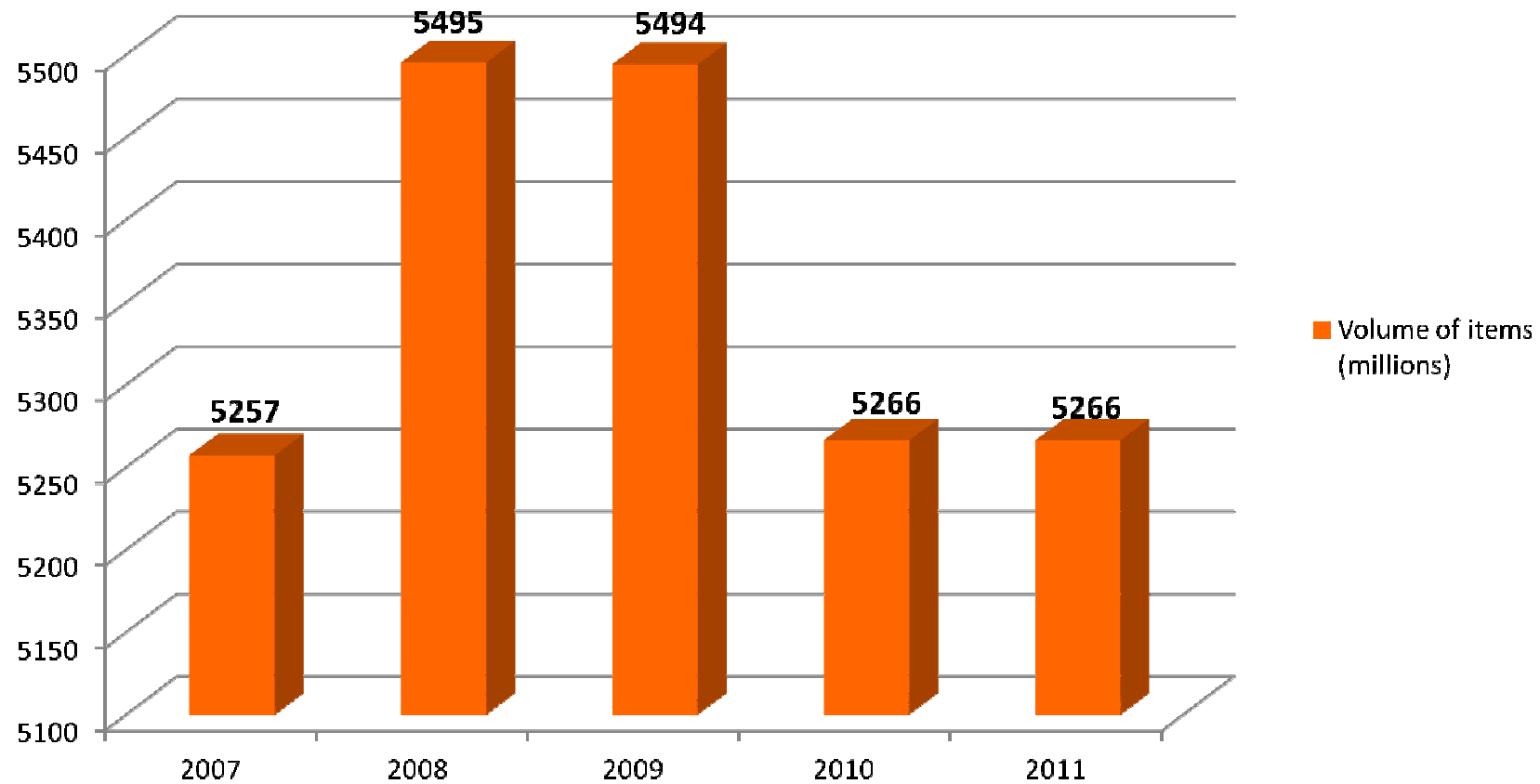


Source: Austrian Post/FEIBRA



Belgium

Size of the Door Drop Market in Belgium

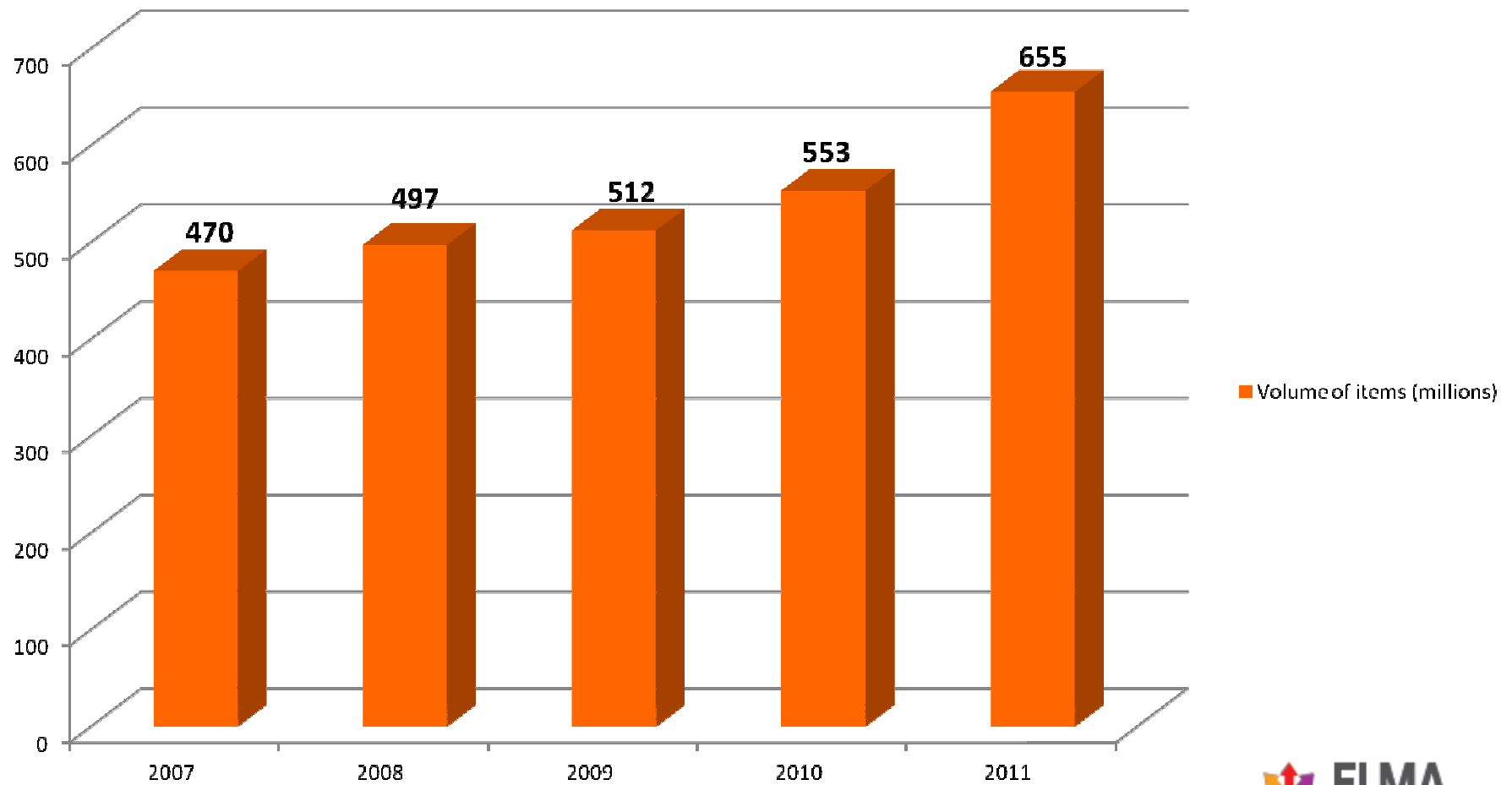


Source: BD



Croatia

Size of the Door Drop Market in Croatia

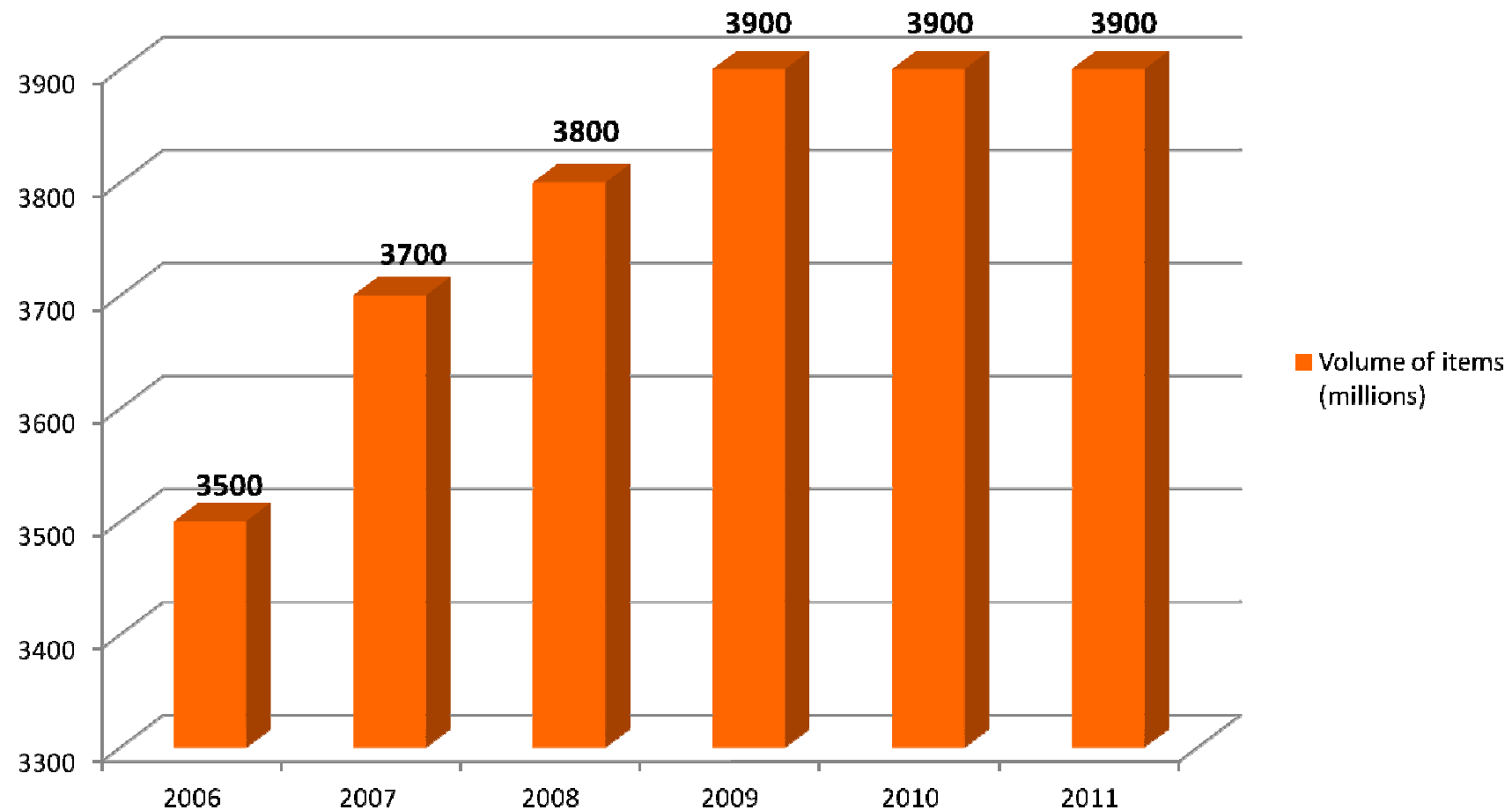


Source: Weber-Escal



Czech Republic

Size of the Door Drop Market in Czech Republic

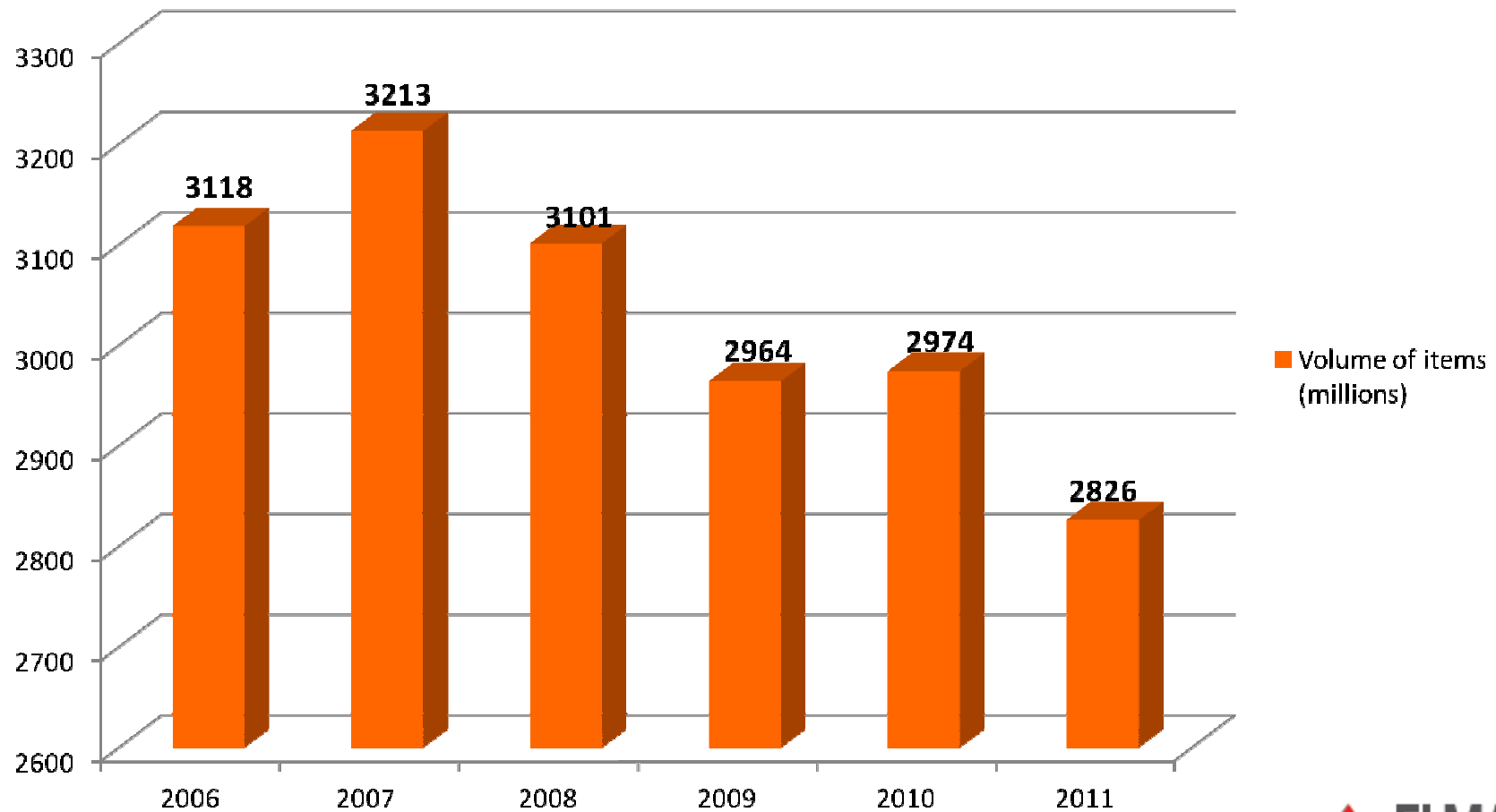


Source: ADMAZ



Denmark

Size of the Door Drop Market in Denmark

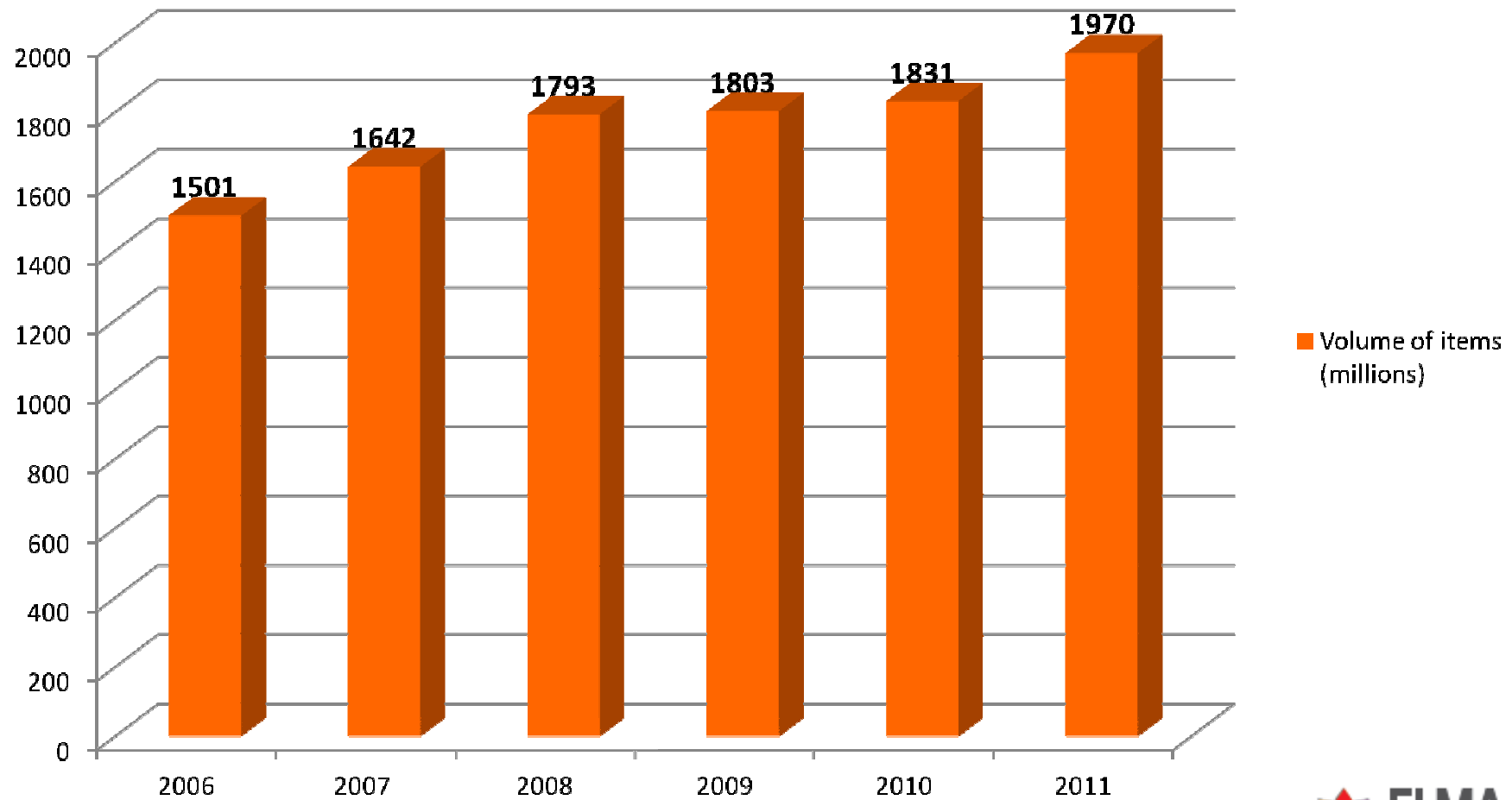


Source: FK



Finland

Size of the Door Drop Market in Finland

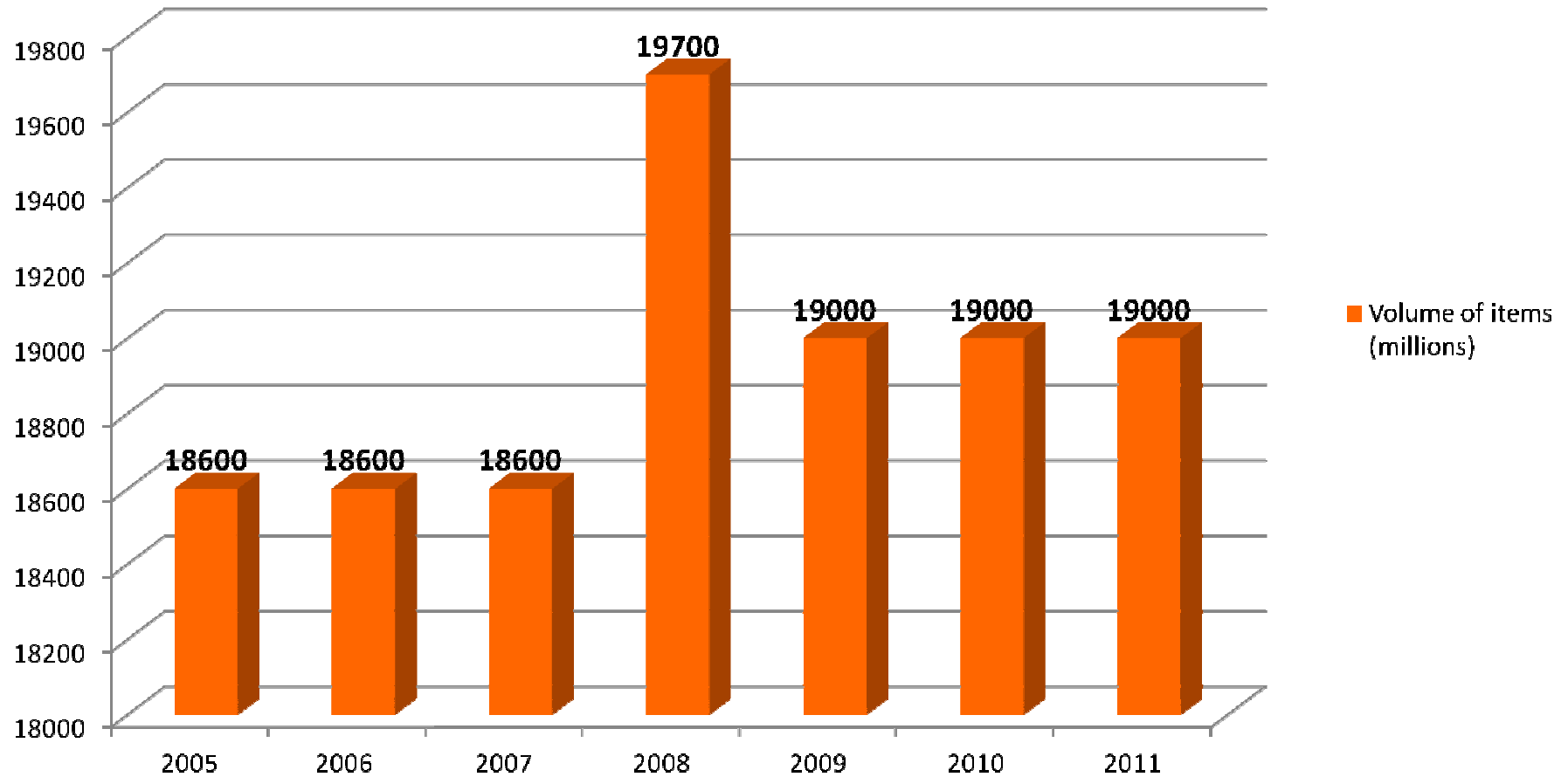


Source: SSM



France

Size of the Door Drop Market in France

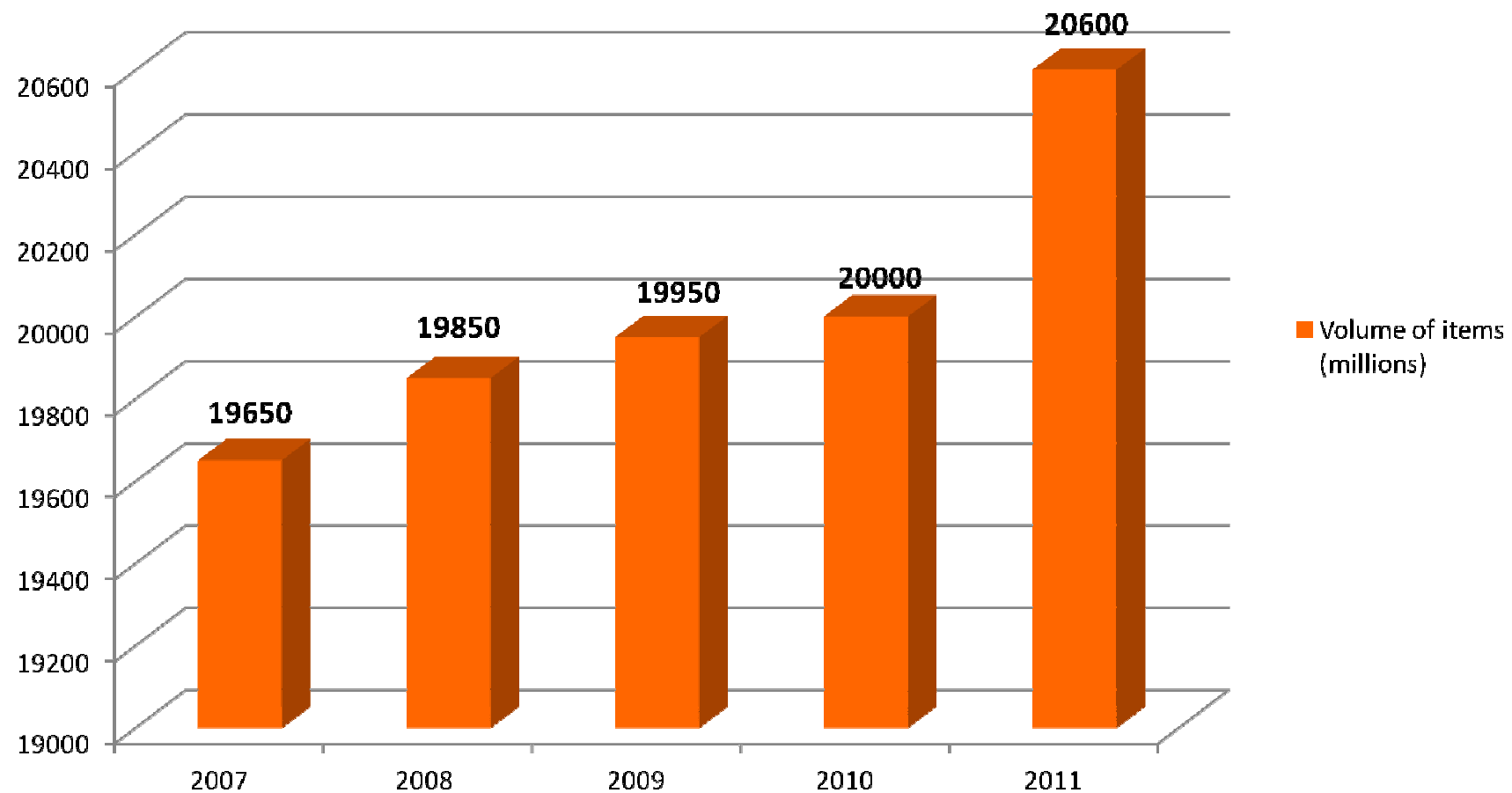


Source: FEDMA/Autorité de Régulation des Postes et Télécommunications



Germany

Size of the Door Drop Market in Germany

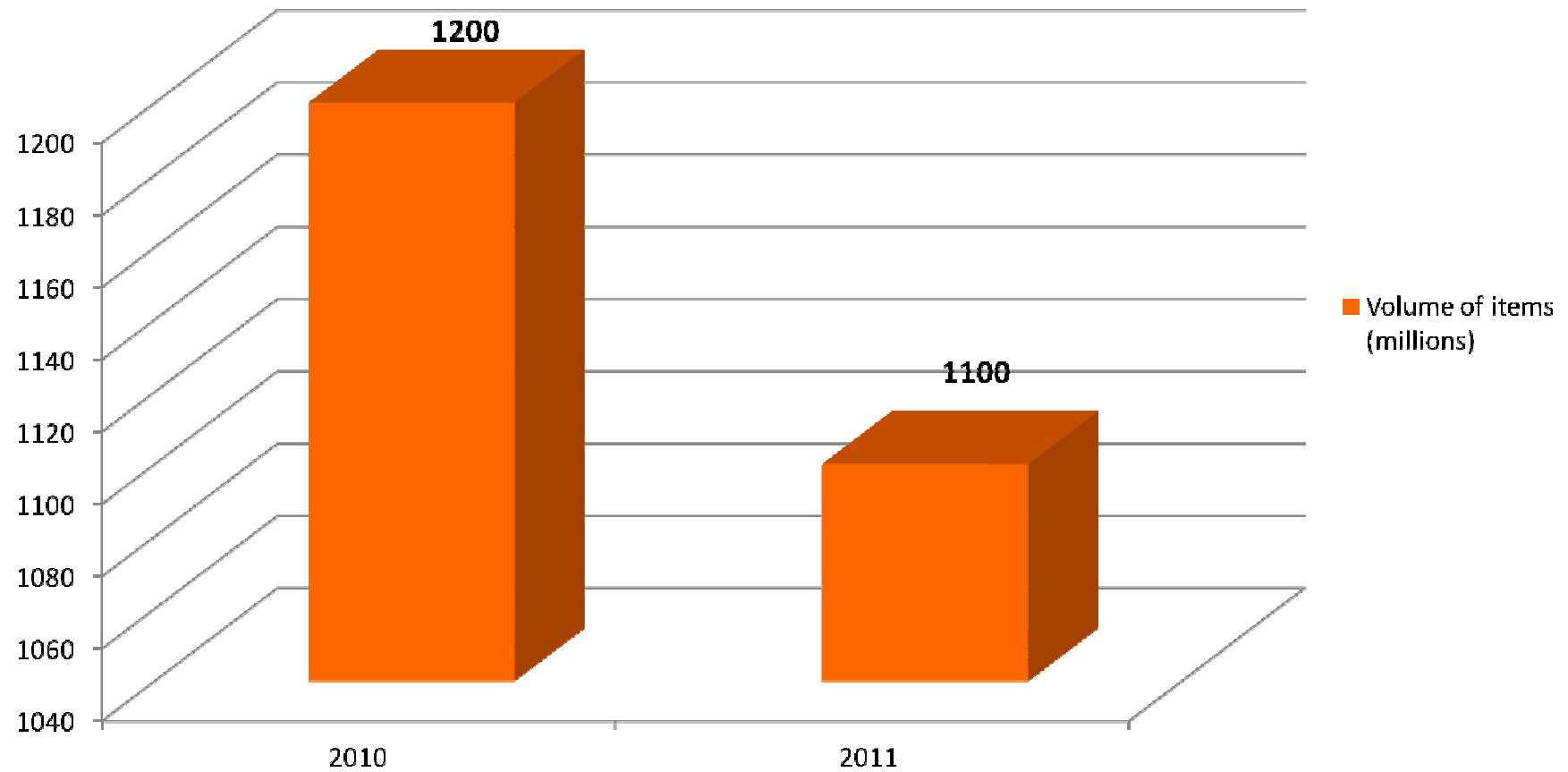


Source: www.acquisa.de & DMA Germany 2011 DPAG



Greece

Size of the Door Drop Market in Greece

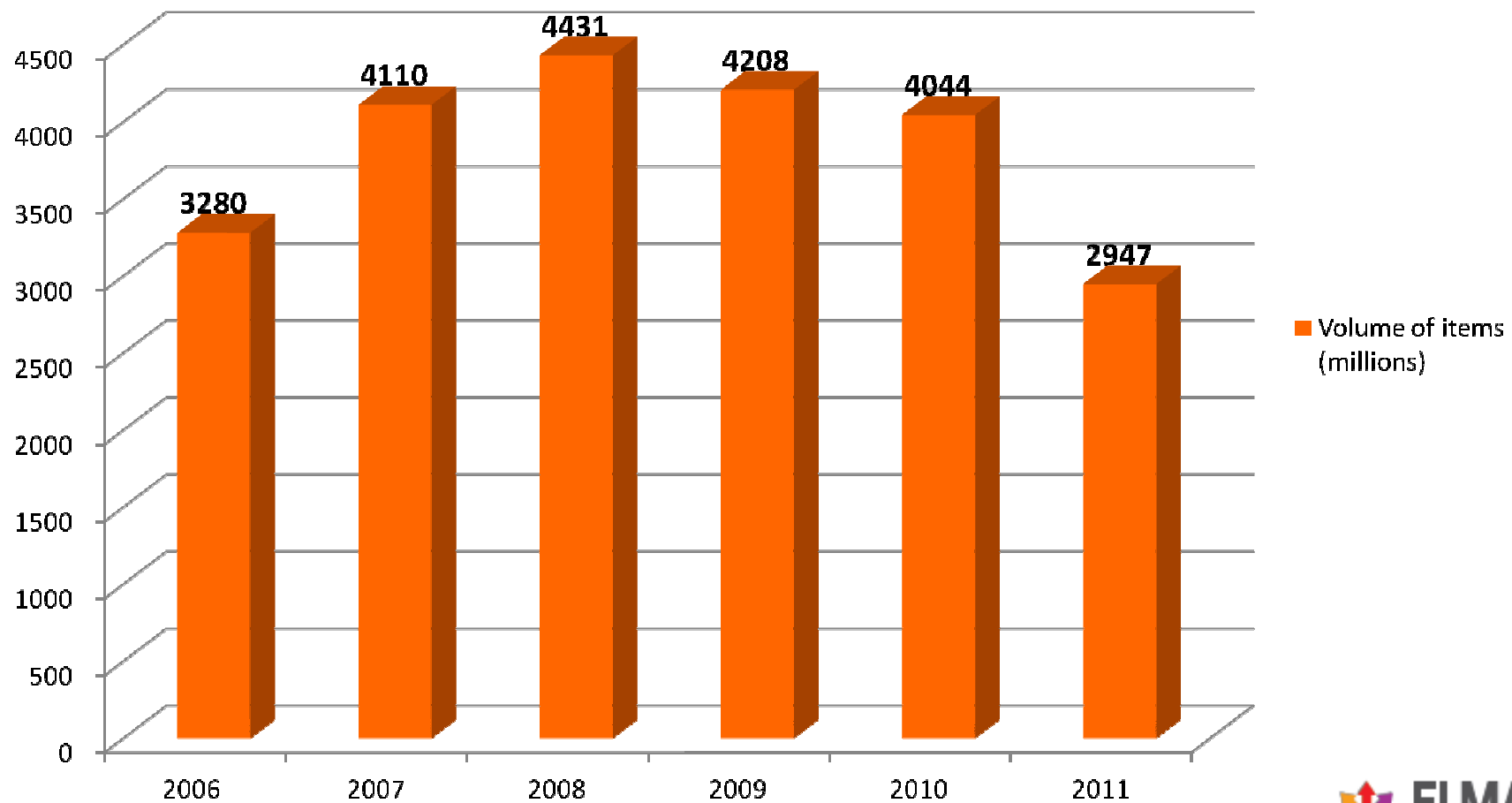


Source: Deltapost



Hungary

Size of the Door Drop Market in Hungary

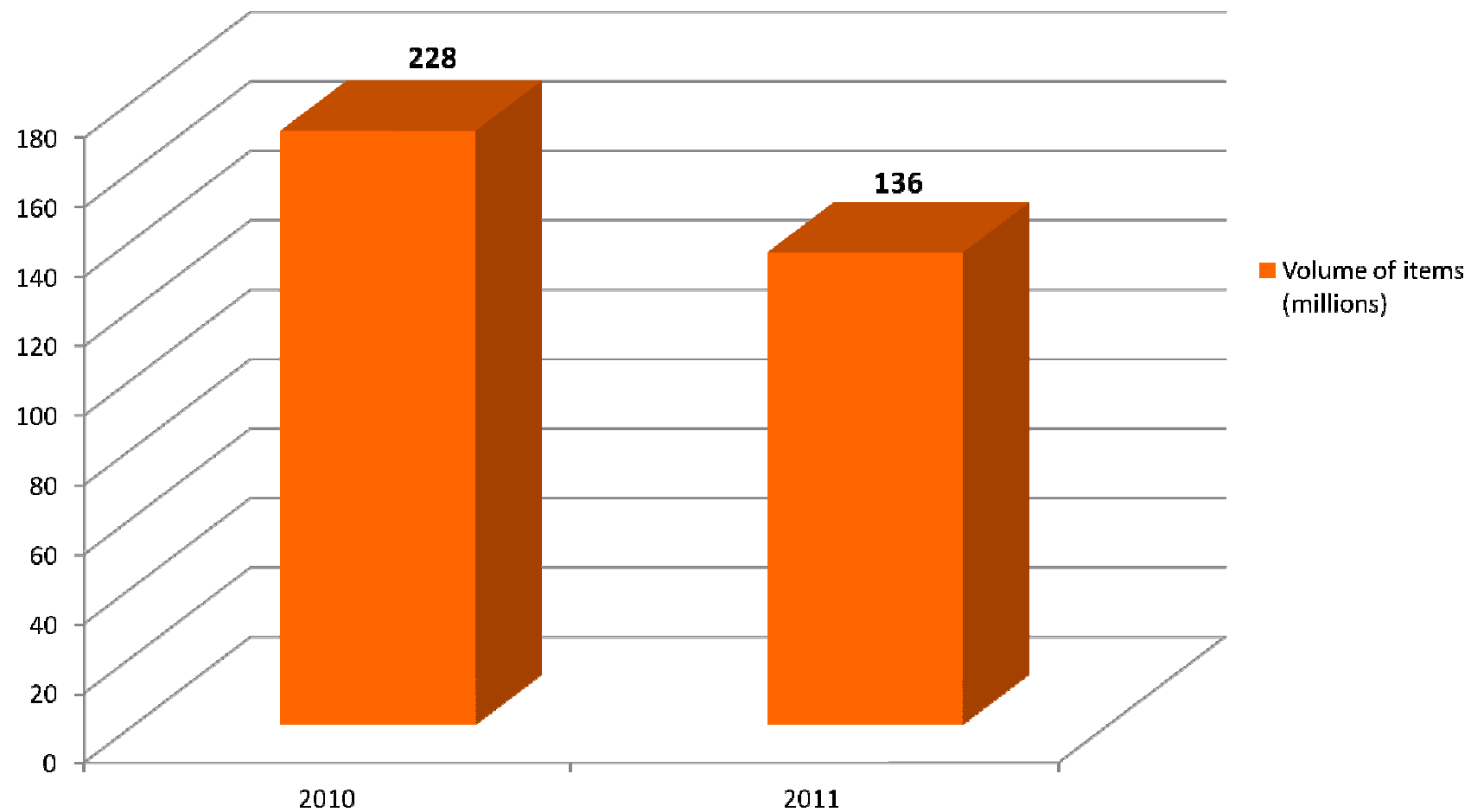


Source: DMA Hungary



Ireland

Size of the Door Drop Market in Ireland

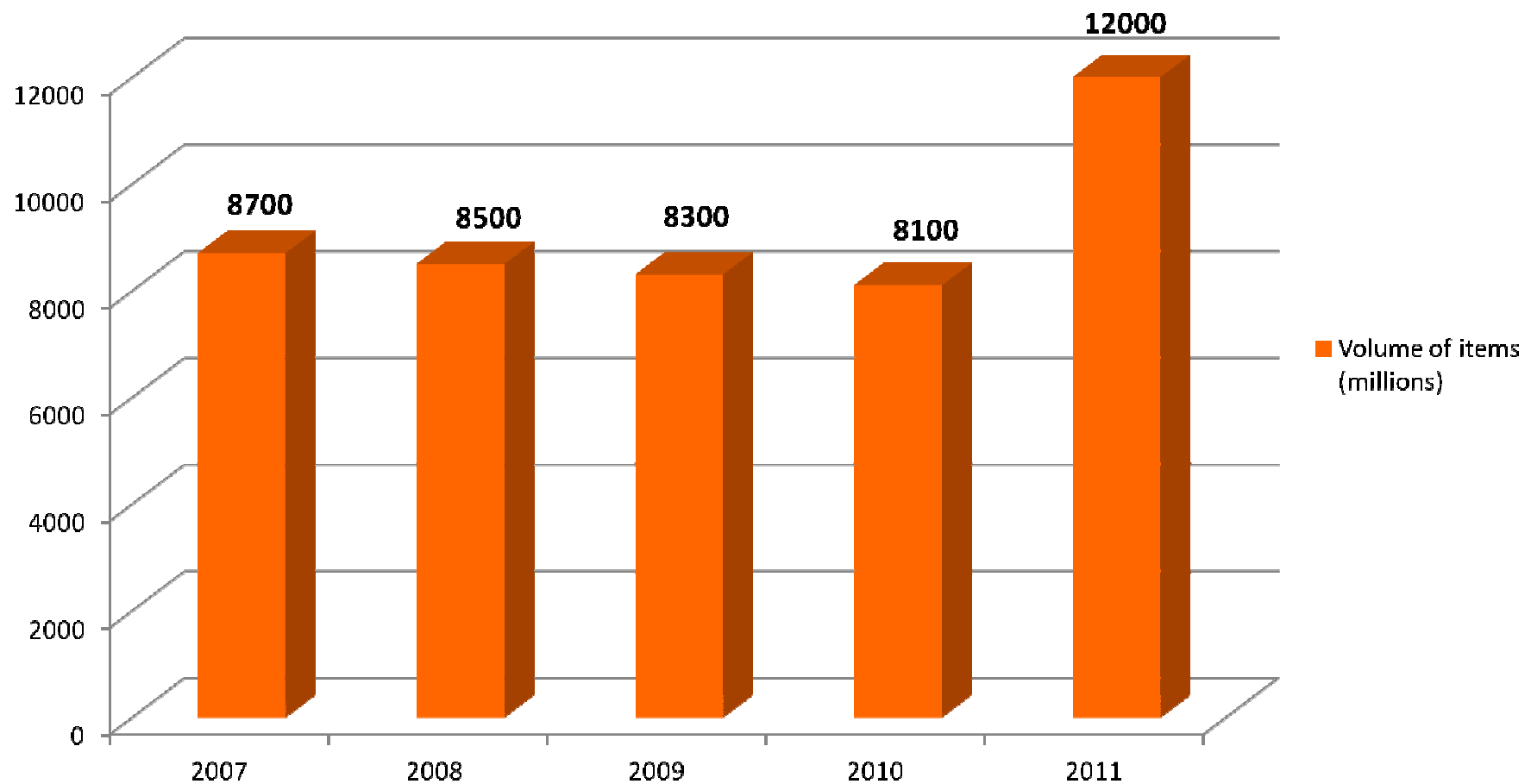


Source: Door to Door Distributors



Italy

Size of the Door Drop Market in Italy

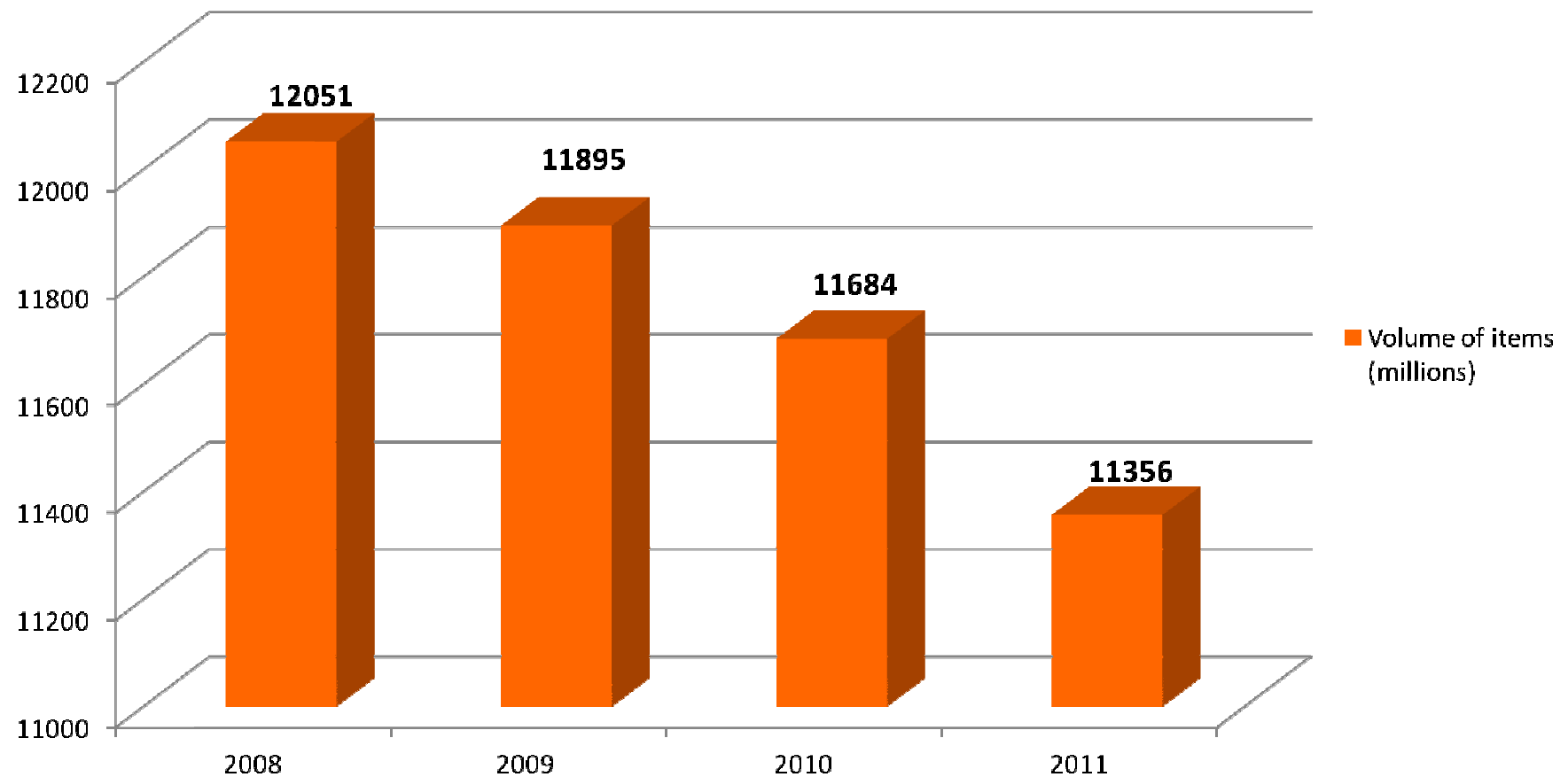


Source: Italia Distribuzioni



Netherlands

Size of the Door Drop Market in the Netherlands

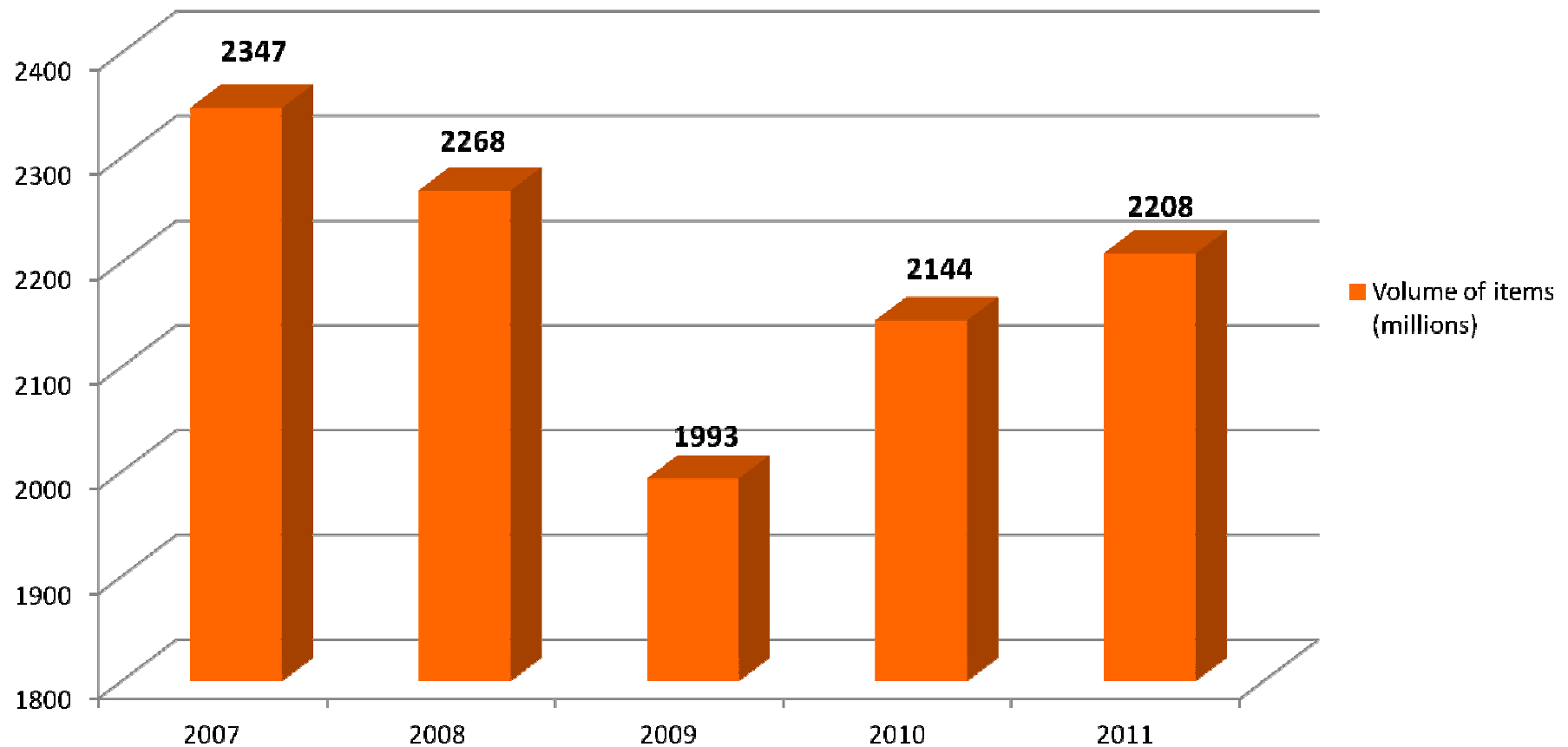


Source: DMA Netherlands



Norway

Size of the Door Drop Market in Norway

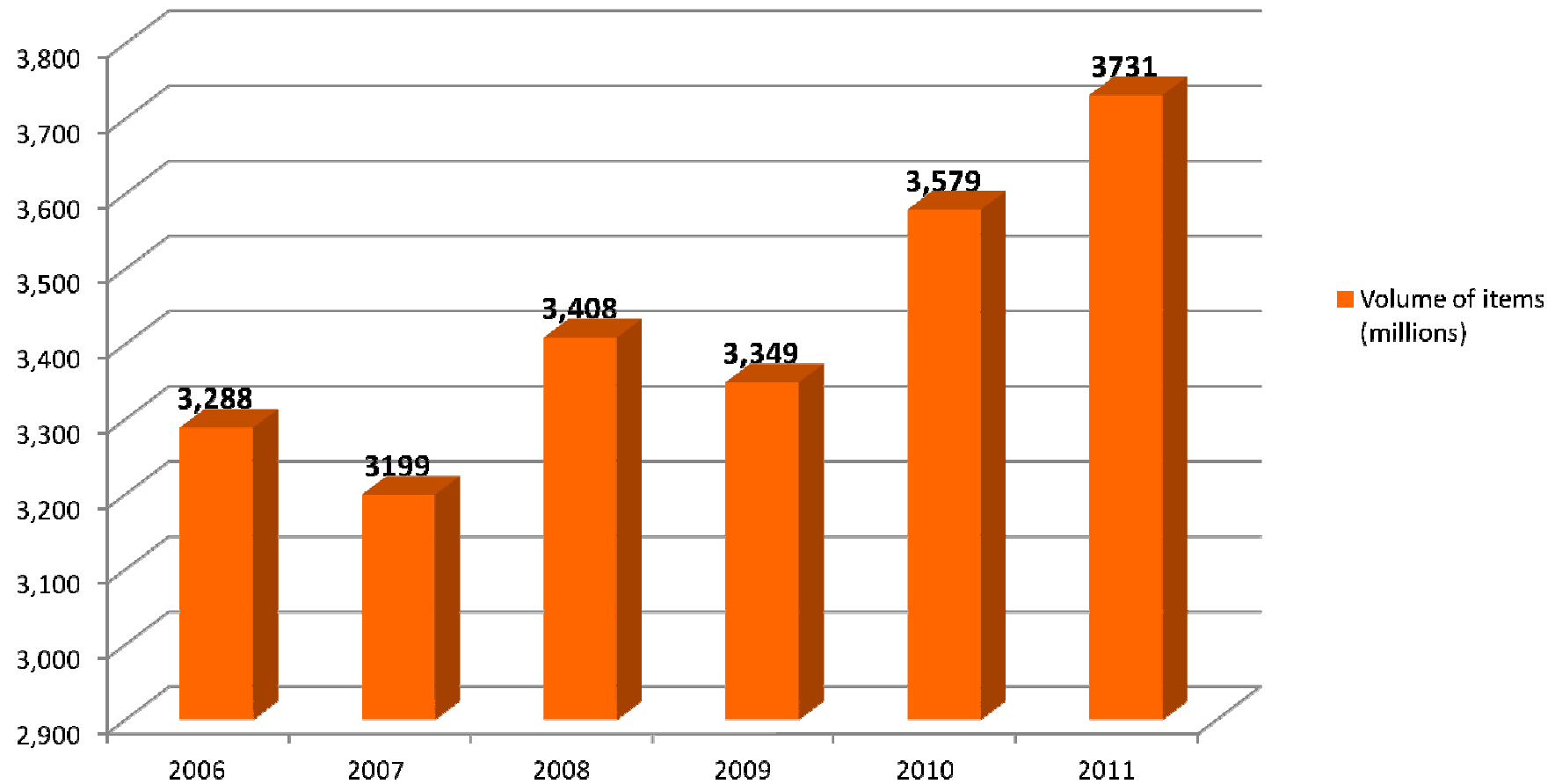


Source: Norwegian Post & Telecommunications Authority



Poland

Size of the Door Drop Market in Poland

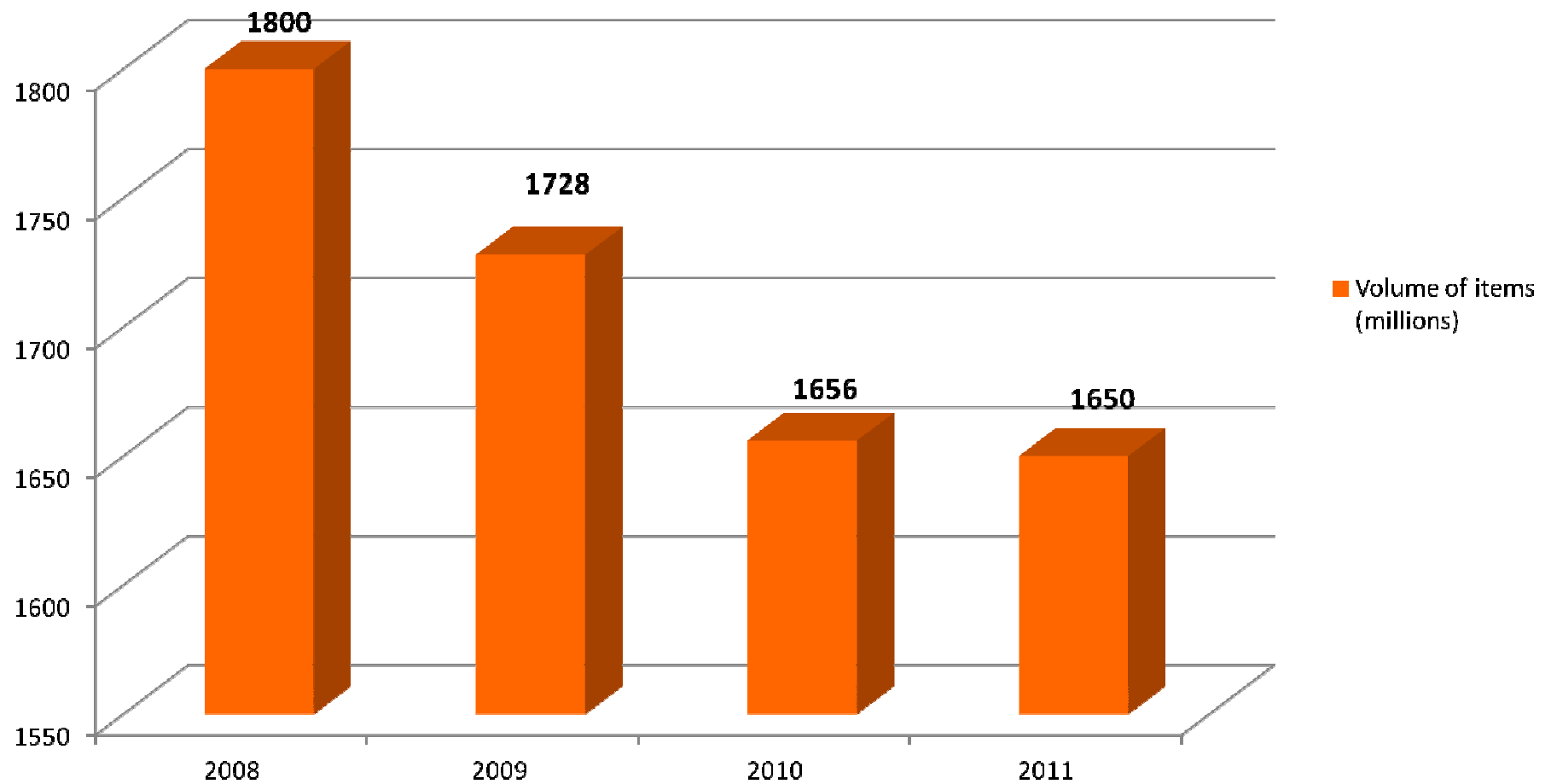


Source: Polish Regulator Office (UKE)



Portugal

Size of the Door Drop Market in Portugal

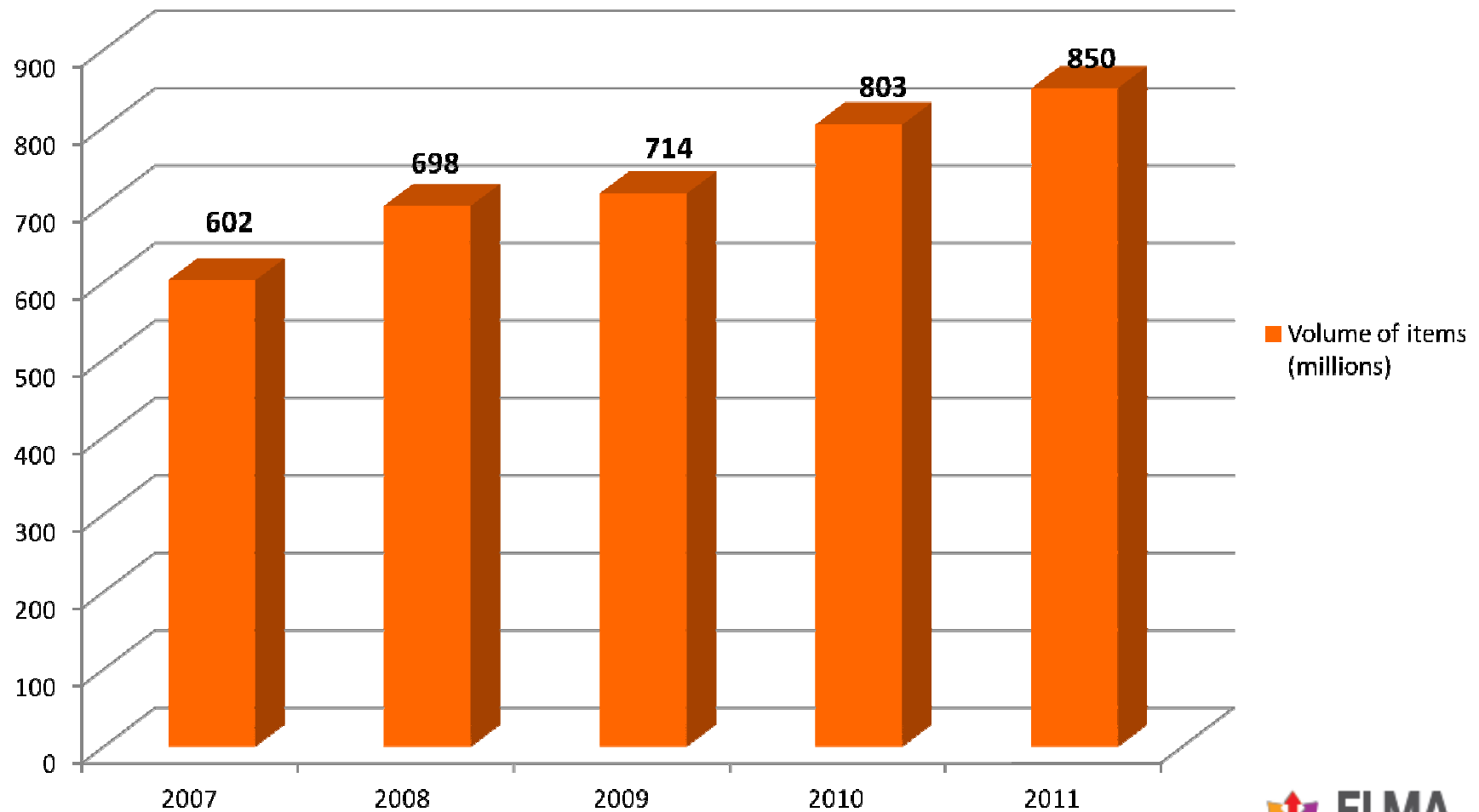


Source: Mediapost Portugal



Romania

Size of the Door Drop Market in Romania

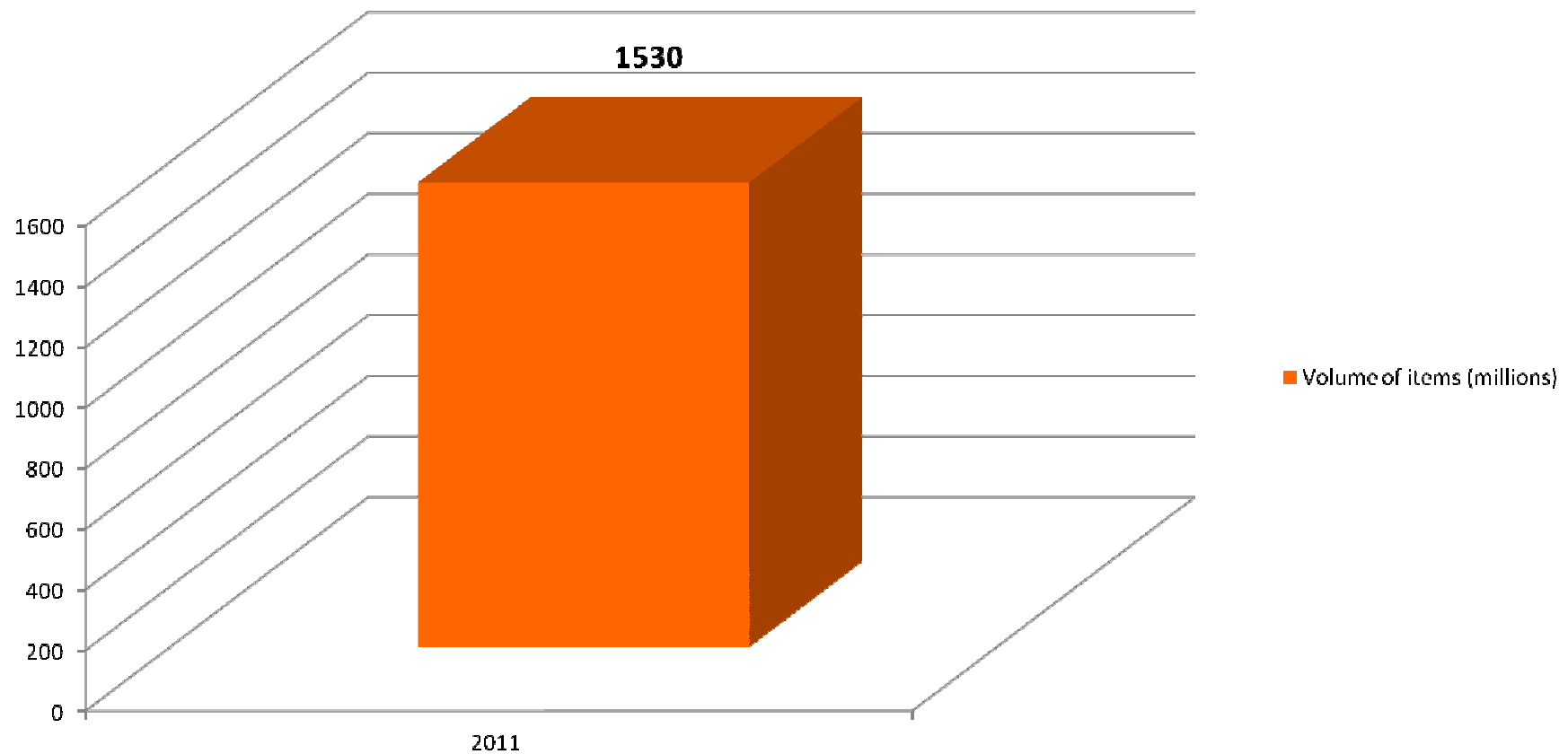


Source: Mediapost Romania



Slovakia

Size of the Door Drop Market in Slovakia

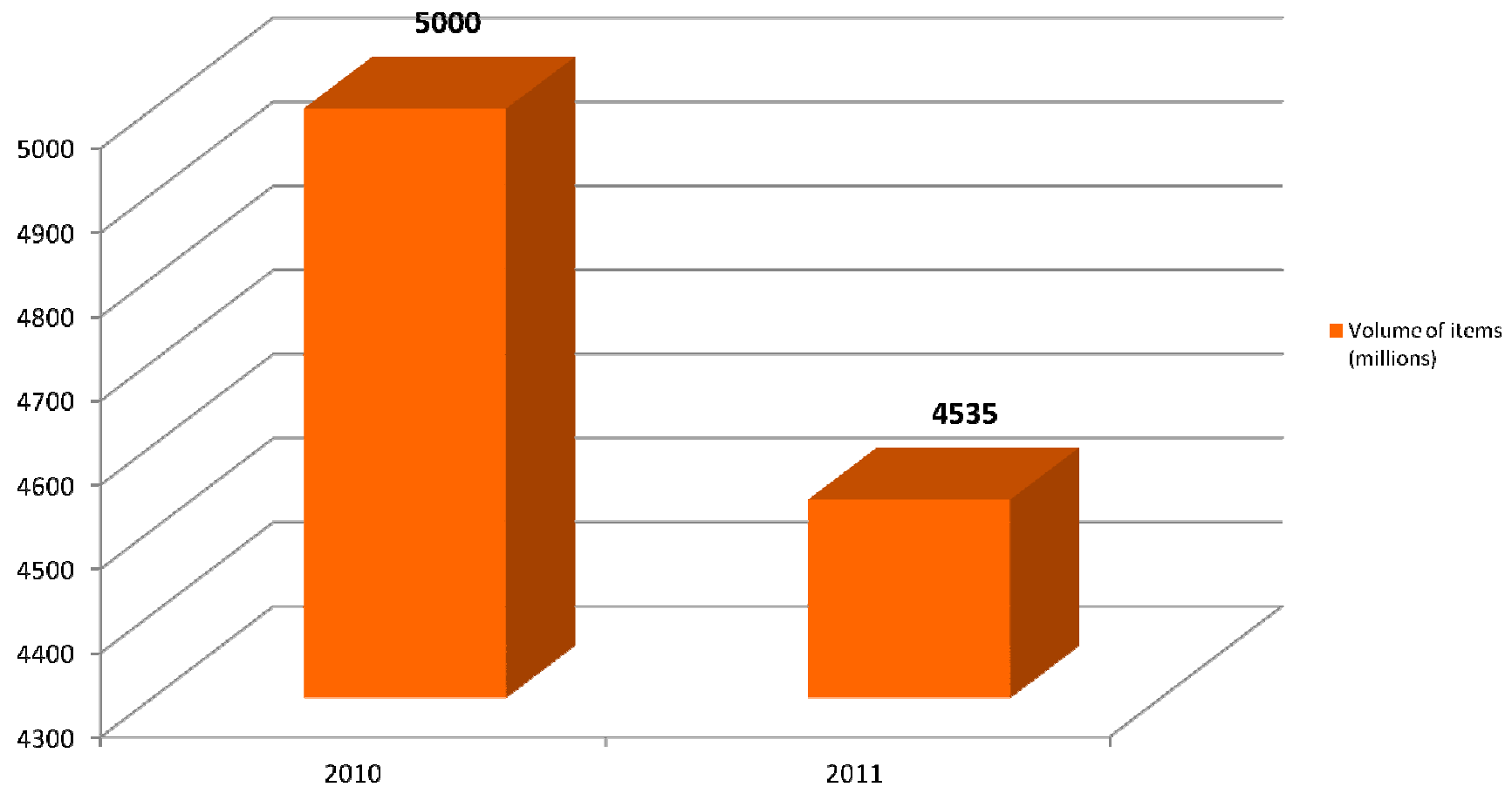


Source: KOLOS



Spain

Size of the Door Drop Market in Spain

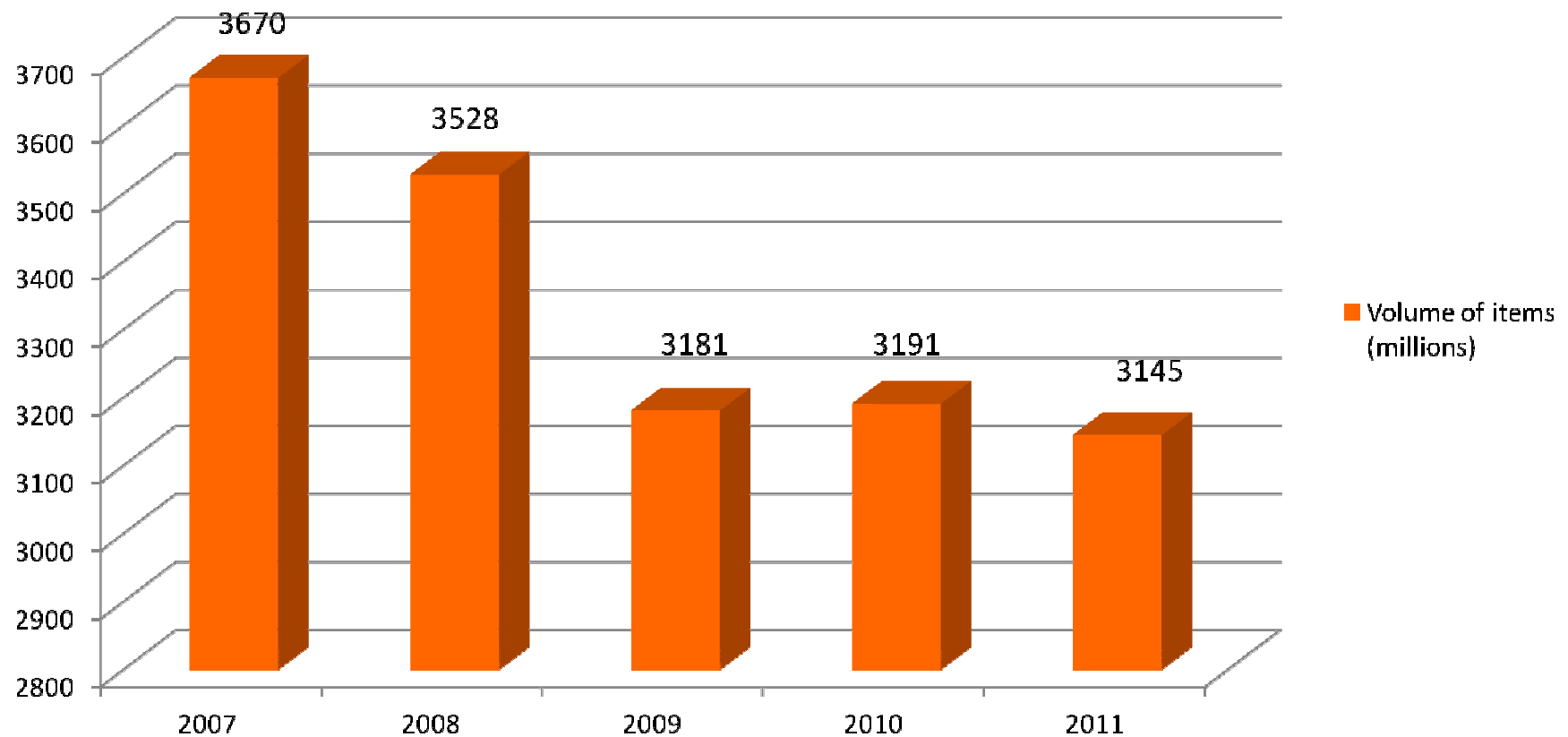


Source: Infoadex



Sweden

Size of the Door Drop Market in Sweden

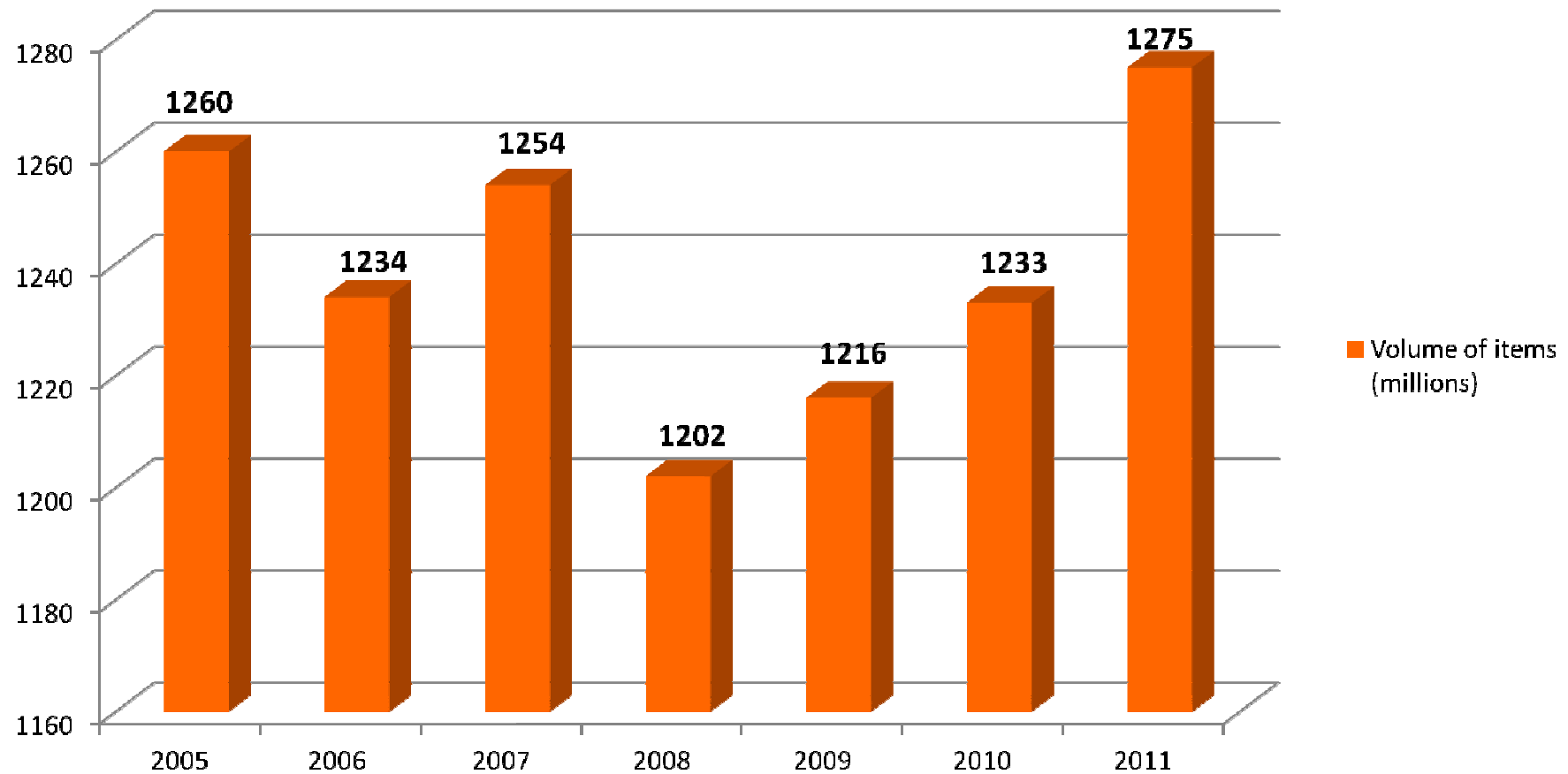


Source: Institute for Advertising and Media Statistics



Switzerland

Size of the Door Drop Market in Switzerland

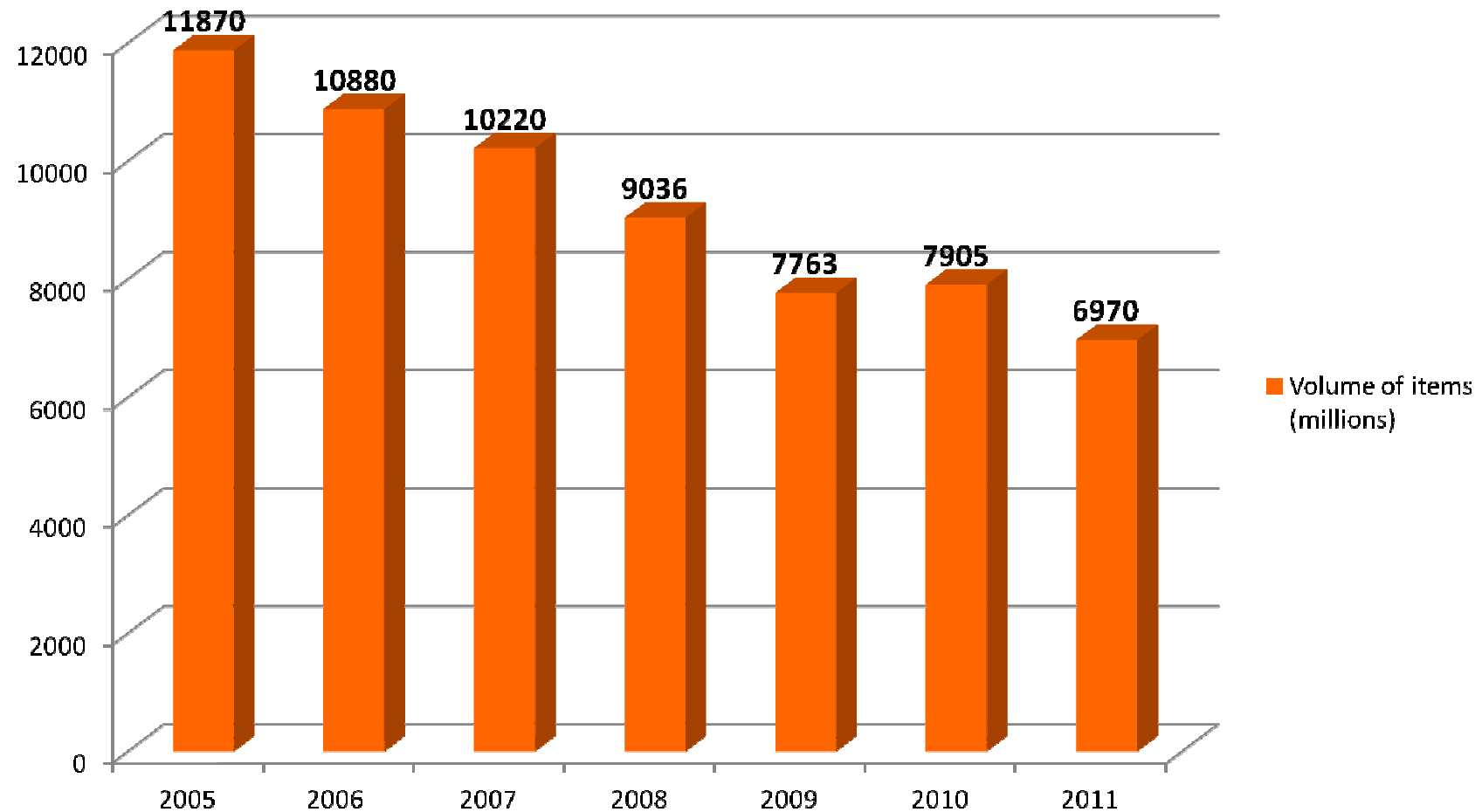


Source: Direct Mail Company



United Kingdom

Size of the Door Drop Market in the UK



Source: DMA UK