**Direct marketing global panorama research**

**1 Response deadline**

We would be grateful if you could complete the survey, preferably online through the link [forms.office.com/e/ykEsWT7T5](https://forms.office.com/e/ykEsWT7T5r)r, **by no later than 5 April 2024**. If, however, you complete the Word version below instead, it should be returned by the same deadline, preferably by e-mail to [directmarketing@upu.int](mailto:directmarketing@upu.int). Should you have any questions or need assistance, please contact the DMAB secretariat by e-mail at [DOP.DMAB@upu.int](mailto:DOP.DMAB@upu.int).

**2 Respondent details**

|  |  |  |
| --- | --- | --- |
| Name of organization or designated operator | | |
| Full name of person completing the questionnaire | | Mr  Ms |
| Position/title | | |
| E-mail | Tel. | |
| Date | Signature | |
| Designated UPU contact for direct mail/digital marketing matters | | |
| Supervisor’s name and signature | | |

**3 Survey questions**

The survey questions are grouped in a number of sections based on broad thematic areas.

**Part 1: Current practices – Cross-border physical direct marketing**

1.1 The market context in which direct marketing operates has changed considerably over the last decade. A multifaceted marketing strategy today comprises a mix of both physical and digital channels. Which direct marketing channel does your organization use more?

Digital direct marketing channels

Physical direct marketing channels

1.2 What types of direct marketing services, whether in physical or digital formats, do you currently offer to clients? (choose all those that apply)

E-mail sending (synchronized with mail campaign advancement)

Phone message sending (synchronized with mail campaign advancement)

Instant messaging/social network (synchronized with mail campaign advancement)

Yes No

Mail/campaign tracking (through raw data and/or visualization mapping)

Actions of the mail carrier when delivering the envelope messaging/social net­work

Performance monitoring of the marketing campaign

N/A

Other (please specify):

|  |
| --- |
|  |

1.3 In the past six months, have you conducted any cross-border physical direct marketing campaigns (addressed or unaddressed mail)?

If “yes”, go to question 1.6.

1.4 Are you considering launching such services in the short term (addressed or unaddressed mail)?

If “yes”, go to question 1.7.

If “no”, go to question 1.5, then to part 6 (“Domestic market”).

1.5 What are the main obstacles preventing you from entering this market?

|  |
| --- |
|  |

1.6 For one of your last emblematic campaigns in the past six months, how did you go about preparing and sending your direct marketing material? (Please specify whether it was an inbound or an outbound flow.)

|  |
| --- |
|  |

1.7 How do you ensure the accuracy of recipient addresses for direct mail printing?

Manual review

Address standardization software

N/A

Other (please specify):

|  |
| --- |
|  |

1.8 How do customers find you when they want to print and distribute marketing mailings?

|  |
| --- |
|  |

Yes No

1.9 How is the design of the campaign materials carried out (in-house, outsourced, by cus­tomers, etc.)?

|  |
| --- |
|  |

1.10 Do you accept samples inside your direct marketing products?

If “no”, go to part 2 (“Market products, services and customers”).

1.11 What is the shipment volume of these products?

|  |
| --- |
|  |

**Part 2: Market products, services and customers – Cross-border physical direct marketing**

2.1 From which sectors or industries in your market do customers that place the highest demand for direct marketing campaigns (whether physical or digital) come? (select a maximum of three)

Beauty and healthcare

Electronics

Fashion

Furniture and home appliances

Mass market (food, beverages, etc.)

Telecoms/media

Automotive

Banking and insurance

Association

N/A

Other (please specify):

|  |
| --- |
|  |

2.2 Based on your answer to the question above, have you created dedicated offers or promotional services for these sectors?

|  |
| --- |
|  |

Yes No

2.3 Please describe the characteristics of your most popular or successful direct marketing product (i.e. in terms of size, format, weight, price, etc.) and indicate why that product is the most popular or successful one.

|  |
| --- |
|  |

**Part 3: Market trends – Cross-border physical direct marketing**

3.1 How have cross-border direct marketing trends changed over the last three years?

Increased

Decreased

Same for last three years

3.2 What are the current and future desires and appeal of the direct marketing market raised by your customers?

a From a sender’s perspective:

|  |
| --- |
|  |

b From a recipient’s perspective:

|  |
| --- |
|  |

3.3 Do you use a customer satisfaction measurement tool such as net promoter score (NPS)?

If so, what is your average score (from 1 to 10)?

3.4 What irritants or needs are most often raised by your customers?

|  |
| --- |
|  |

3.5 Which are your top five inbound and outbound partner countries for cross-border flows in terms of volumes?

|  |
| --- |
| 1 |
| 2 |
| 3 |
| 4 |
| 5 |

**Part 4: Competitive landscape – Cross-border physical direct marketing** Yes No

4.1 What is your relative market share in the physical direct marketing market (for cross border)?

|  |
| --- |
|  |

4.2 Who are the main physical direct marketing competitors in your area?

|  |
| --- |
|  |

4.3 How do you interact (as a partner) with or perceive (as a competitor) the other carriers in your area (non-postal)?

|  |
| --- |
|  |

4.4 In your view, what are the most significant trends or factors likely to have an impact (positive and negative) on your organization’s direct mail marketing offerings in the com­ing years?

|  |
| --- |
|  |

4.5 How do you perceive the level of competition from traditional advertising agencies and digital marketing firms in the provision of physical direct marketing services?

Provide a scale, i.e. 1 – no competition, 5 – very stiff competition:

4.6 How do you assess the impact of emerging digital marketing technologies (artificial intelligence (AI), machine learning, etc.) on the competitive landscape for physical direct marketing services?

|  |
| --- |
|  |

4.7 Have you observed any shifts in market demand or client preferences towards digital direct marketing services?

If so, how do those shifts affect your competitive positioning?

|  |
| --- |
|  |

4.8 What reasons do your customers give for not renewing an existing contract?

Switch to another media (please specify in response to the next question)

Not enough advertising budget

Marketing automation platforms

Other (please specify):

|  |
| --- |
|  |

4.9 If you selected “Switch to another media” in response to the question above, please specify:

|  |
| --- |
|  |

**Part 5: Future scenario – Cross-border physical direct marketing**

5.1 What are the main benefits and obstacles of competitive cross-border offerings (the obstacles could stem from regulatory/legal constraints, but also from shortcomings in the UPU product portfolio)?

|  |
| --- |
| Strengths: |
| Weaknesses: |
| Opportunities: |
| Threats: |

5.2 How do you foresee cross-border direct marketing trends developing in the next three years?

Increasing

Decreasing

Same as for last three years

5.3 What should postal operators do differently than today in order to remain competitive in the emerging and future direct marketing services and products market?

|  |
| --- |
|  |

**Part 6: Domestic market**

6.1 Please describe the characteristics of your most popular direct marketing product:

|  |  |
| --- | --- |
| In terms of offer |  |
| In terms of format (size, weight) |  |
| In terms of its delivery time frame |  |

Yes No

6.2 What are the main trends of your domestic physical direct marketing sector?

|  |
| --- |
|  |

6.3 On a scale of 1 to 5, where 1 is the lowest and 5 is the highest, how would you rate the level of competition in your domestic physical direct marketing market?

**Part 7: Current practices – Cross-border digital direct marketing**

7.1 What technologies or platforms do you utilize to facilitate the delivery and tracking of digital direct marketing campaigns? (choose all that apply)

E-mail marketing software

Customer relationship management (CRM) systems

Marketing automation platforms

Social media management tools

Campaign tracking tools

N/A

Other (please specify):

|  |
| --- |
|  |

7.2 In the past six months, have you conducted any cross-border digital direct marketing campaigns (addressed or unaddressed mail)?

If “yes”, go to question 7.5.

7.3 Are you considering launching such services in the short term?

If “yes”, go to question 7.5.

If “no”, go to question 7.4, and then to part 12 (“Domestic market”).

7.4 What are the main obstacles preventing you from entering this market?

|  |
| --- |
|  |

7.5 For one of your last emblematic campaigns in the past six months, how did you go about preparing and sending your direct marketing material? (Please specify whether it was an inbound or an outbound flow.)

|  |
| --- |
|  |

Yes No

7.6 How is the design of the campaign materials carried out (in-house, outsourced, by cus­tomers, etc.)?

|  |
| --- |
|  |

7.7 How is the printing of direct marketing materials carried out (in-house, outsourced, by customers, etc.)?

|  |
| --- |
|  |

**Part 8: Market products and services – Cross-border digital direct marketing**

8.1 From which sectors or industries in your market do customers that place the highest demand for direct marketing campaigns (whether physical or digital) come? (select a maximum of three)

Beauty and healthcare

Electronics

Fashion

Furniture and home appliances

Mass market (food, beverages, etc.)

Telecoms/media

Automotive

Banking and insurance

Association

N/A

Other (please specify):

|  |
| --- |
|  |

8.2 Based on your answer to the question above, have you created dedicated offers or promotional services for these sectors?

|  |
| --- |
|  |

**Part 9: Market trends – Cross-border digital direct marketing**

9.1 How have cross-border direct marketing trends changed over the last three years?

Increased

Decreased

Same as for last three years

Yes No

9.2 What are the main trends influencing this market?

|  |
| --- |
|  |

9.3 Do you use a customer satisfaction measurement tool such as NPS?

If so, what is your average score (from 1 to 10)?

9.4 What irritants or needs are most often raised by your customers?

|  |
| --- |
|  |

**Part 10: Competitive landscape – Cross-border digital direct marketing**

10.1 What is your relative market share in the digital direct marketing sector?

|  |
| --- |
|  |

10.2 Who are the main direct marketing competitors in your area?

|  |
| --- |
|  |

10.3 How do you assess the impact of emerging digital marketing technologies (e.g. AI, machine learning) on the competitive landscape for digital direct marketing services?

|  |
| --- |
|  |

10.4 In your view, what are the most significant trends or factors likely to have an impact (positive and negative) on your organization’s digital marketing offerings in the coming years?

|  |
| --- |
|  |

10.5 What strategies do you employ to differentiate your digital direct marketing services from those offered by dedicated digital marketing agencies or platforms?

|  |
| --- |
|  |

Yes No

10.6 How do you strategically position your direct marketing services to compete with online advertising platforms (e.g. Google Ads, Facebook ads) for digital marketing budgets?

|  |
| --- |
|  |

**Part 11: Future scenario for cross-border digital direct marketing**

11.1 What are the main benefits and obstacles in competitive cross-border offerings (the obstacles could stem from regulatory/legal constraints, but also from shortcomings in the UPU product portfolio)?

|  |
| --- |
| Strengths: |
| Weaknesses: |
| Opportunities: |
| Threats: |

11.2 How do you foresee cross-border direct marketing trends developing in the next three years?

Increasing

Decreasing

Same as today

11.3 What technological infrastructure do you have in place to support the emerging and future development of digital direct marketing services (e.g. e-mail campaigns, digital advertising, etc.)?

|  |
| --- |
|  |

11.4 What additional services or features do you plan to offer in the future to meet evolving client needs in direct marketing?

|  |
| --- |
|  |

**Part 12: Domestic market**

12.1 In the past six months, have you conducted any domestic direct marketing campaigns via addressed or unaddressed mail)?

12.2 What are the main road blockers for not doing so?

|  |
| --- |
|  |

12.3 Please describe the characteristics of your most popular direct marketing product:

* In terms of offer (SMS, e-mail, WhatsApp messages, social network, etc.)
* In terms of its delivery time frame

|  |
| --- |
|  |

12.4 What are the main trends influencing this market?

|  |
| --- |
|  |

12.5 On a scale of 1 to 5, where 1 is the lowest and 5 is the highest, how would you rate the level of compe­tition in your domestic digital marketing and/or physical market?

Thank you very much for completing this survey.