



## Direct mail and digital marketing survey 2022

### 1 Introduction

The market context within which direct mail operates has changed considerably over the last decade, as the universe gets increasingly virtualized and digitalized into a metaverse. A multifaceted marketing strategy today will comprise a mix of both physical and digital channels, with varying levels of effectiveness.<sup>1</sup> The fact is that direct mail and digital marketing boost sales and continue to play a key role in the development of both domestic and cross-border e-commerce. Studies show a strong correlation between digital marketing tactics and the foreign market growth, performance and competitiveness of large firms and small and medium-sized enterprises (SMEs) alike.<sup>2</sup>

The recent global supply chain disruption caused by the COVID-19 pandemic accelerated e-commerce adoption as more people worked from home and an increasing number of enterprises gained online presence. There is an opportunity for postal operators to support foreign entry of local businesses into cross-border markets using direct mail and digital marketing services and products. However, operational cost increases, precision targeting requirements, and data-privacy related laws continue to pile pressure on most players in this field. The UPU has to define and develop a new and sustainable Direct Marketing Advisory Board (DMAB) model, with a clear unique value proposition, that can support not only DMAB members, but all Union members, to respond to the ongoing direct mail and digital marketing challenges and opportunities. Your response to this survey will play a key role in this endeavour.

We would be grateful if you could complete the survey, preferably online through SurveyMonkey ([www.surveymonkey.com/r/DMAB](http://www.surveymonkey.com/r/DMAB)) **no later than 2 September 2022**. If you complete the Word version below instead, it should be returned by the same deadline, preferably by e-mail ([directmarketing@upu.int](mailto:directmarketing@upu.int)).

### 2 Respondent details

Name of organization or designated operator	
Full name of person completing the questionnaire	
<input type="checkbox"/> Mr <input type="checkbox"/> Ms	
Position/title	
E-mail	Tel.
Signature	Date
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.

<sup>1</sup> A BIAS FOR ACTION: The neuroscience behind the response-driving power of direct mail, Canada Post, 31 July 2015.

<sup>2</sup> Strategic orientations and digital marketing tactics in cross-border e-commerce: Comparing developed and emerging markets, Sjoukje PK Goldman, Hester van Herk, Tibert Verhagen, Jesse WJ Weltevreden, 2021.

Yes No

**Part A: Domestic services and products**

1 Does your organization currently offer any domestic direct mail<sup>3</sup> or digital marketing<sup>4</sup> services/products?

a Direct mail

 

b Digital marketing

 

2 If you answered No to either part of question 1, please explain why this is the case:

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3 For any part of question 1 to which you answered Yes, please list the top three types of direct mail and/or digital marketing services/products that your domestic customers prefer the most:

a Direct mail

1
2
3

b Digital marketing

1
2
3

4 If you were to discontinue certain types of direct mail and/or digital marketing services/products that you currently offer to your domestic customers (owing to low demand, high costs, competitive disadvantage, etc.), which ones would they be?

a Direct mail

1
2
3

b Digital marketing

1
2
3

<sup>3</sup> Direct mail product or service: letter-post products or services specifically designed for the collection and distribution of advertising items. The product or service has a brand that allows customers and potential customers to identify it as suitable for their advertising purposes, and a number of attributes (e.g. definition of content, pricing structure, delivery standards, presentation requirements, etc.) that might also define the postal operational process.

<sup>4</sup> Digital marketing: sometimes called "interactive marketing" or "e-marketing", this is the use of digital media as a communication channel for marketing purposes. Marketing messages are delivered through electronic devices such as personal computers, tablets, mobile phones, game consoles and other equipment. Digital marketing messages can be sent through non-Internet channels such as SMS and notifications on mobile apps, as well as through Internet channels such as e-mail, display ads and social media posts.

Yes No

5 In your country, are there any national laws or regulations regarding direct mail and/or digital marketing (e.g. to protect consumers against unsolicited mail, regulate the market, control data privacy, etc.)?

- a Direct mail  Yes  No
- b Digital marketing  Yes  No

6 In your domestic market, are there other players offering direct mail and/or digital marketing services/products?

- a Direct mail  Yes  No
- b Digital marketing  Yes  No

7 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 direct mail market? Circle only one in each category that applies.

Direct mail	1	2	3	4	5
Digital marketing	1	2	3	4	5

← Low competition High competition →

8 In your view, what are the most significant challenges that your organization faces in offering direct mail and/or digital marketing services/products to your domestic customers?

a Direct mail

1
2
3

b Digital marketing

1
2
3

**Part B: International (cross-border) services and products**

9 Does your organization currently offer any cross-border direct mail and/or digital marketing services/products?

*Inbound (ordered by cross-border customers, delivered in the domestic market)*

- a Direct mail  Yes  No
- b Digital marketing  Yes  No

*Outbound (ordered by domestic customers, delivered in the cross-border market)*

- a Direct mail  Yes  No
- b Digital marketing  Yes  No

- 10 If you answered No to any part of question 9, please explain why this is the case:

*Inbound*

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*Outbound*

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- 11 For any part of question 9 to which you answered Yes, please list the top three types of cross-border direct mail and/or digital marketing services/products that your international customers prefer the most:

*Inbound*

a Direct mail

1
2
3

b Digital marketing

1
2
3

*Outbound*

a Direct mail

1
2
3

b Digital marketing

1
2
3

**Part C: Technology tools, applications, systems and solutions (domestic and cross-border)**

- 12 There are IT tools and solutions that allow customers to order direct mail and digital marketing services/products online through a web or mobile application. Does your organization have an online IT tool or application for your domestic and/or cross-border customers?

*Domestic online application/system*

- a Direct mail
- b Digital marketing

*Cross-border online application/system*

- a Direct mail
- b Digital marketing

- 13 The UPU is considering developing an online cross-border application/system for direct mail services/products, as approved by the DMAB Assembly in 2018. This online application would be integrated with domestic systems, or include a domestic module. Would your organization be interested in the development of such an online direct mail application/system?

**Part D: Volumes, revenue and market share (domestic and cross-border)**

- 14 For any part of question 1 to which you answered Yes, does your organization conduct regular studies to determine direct mail and/or digital marketing market trends, competition levels, customer preferences and satisfaction levels?

- a Direct mail
- b Digital marketing

- 15 For any part of question 1 or question 9 to which you answered Yes, what are the domestic and/or cross-border volumes of direct mail items that your organization processed in the last three years (in number of pieces)?

<i>Year</i>	<i>Domestic volumes (in no. of pieces)</i>	<i>Cross-border volumes (in no. of pieces)</i>
2021		
2020		
2019		

- 16 For any part of question 1 or question 9 to which you answered Yes, what percentage of your organization's total revenue would you estimate is generated by your domestic and/or cross-border direct mail and digital marketing services/products? (Tick only one under each category)

<i>Percentage</i>	<i>Domestic</i>	<i>Cross-border</i>
0–20%	<input type="checkbox"/>	<input type="checkbox"/>
21–40%	<input type="checkbox"/>	<input type="checkbox"/>
41–60%	<input type="checkbox"/>	<input type="checkbox"/>
61–80%	<input type="checkbox"/>	<input type="checkbox"/>
81% or more	<input type="checkbox"/>	<input type="checkbox"/>

- 17 For any part of question 1 or question 9 to which you answered Yes, how has your organization's revenue in domestic and/or cross-border direct mail and digital marketing services/products evolved since 2019?

<i>Revenue trend</i>	<i>Domestic</i>	<i>Cross-border</i>
Increased	<input type="checkbox"/>	<input type="checkbox"/>
Decreased	<input type="checkbox"/>	<input type="checkbox"/>
Same for last three years	<input type="checkbox"/>	<input type="checkbox"/>

- 18 In your view, what are the most significant trends or factors that will have an impact (positive and negative) on your organization's domestic and/or cross-border direct mail and digital marketing offerings in the coming years?

*Domestic*

a Direct mail

1
2
3

b Digital marketing

1
2
3

*Cross-border*

a Direct mail

1
2
3

b Digital marketing

1
2
3

- 19 What strategies and actions has your organization been using or will it use to overcome the challenges that you listed in question 18?

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**Part E: Remodelling of the DMAB: review of membership status and fee structure**

20 Has your organization ever been a member of the DMAB?

21 If you answered Yes to question 20 and *you are not currently a member of the DMAB*, what was the reason for your resignation?

22 If you answered No to question 20, please select from the list below the reason(s) why your organization has never considered joining the DMAB (please select all that apply):

- No distinct benefit or added value to members
- Prohibitive membership fee structure
- Our primary focus is domestic not cross-border market
- Statutes too rigid
- Other (please specify):

23 Whether or not you are currently a member of the DMAB, we would welcome your suggestions on how the DMAB might improve in order to add value, not only to its members, but also to all Union members (given that an increase in direct mail volumes globally will enhance the sustainability of the UPU postal network as a whole):

24 If you answered No to question 20 or if you answered question 21, would your organization be willing to join the DMAB (if the DMAB were able to demonstrate that its unique value proposition and membership benefits could add value to your organization)?

Membership of the UPU DMAB is open to all designated operators of UPU member countries, non-designated operators and members of the Consultative Committee sharing a common interest in fostering the growth of direct mail and digital marketing through postal services. The DMAB is a self-financing body whose funding comes from contributions of its members in the form of joining fees and annual membership fees. The current and the proposed membership fee structures are shown below:

<i>Current DMAB membership fee structure</i>		<i>Proposed DMAB membership fee structure</i>	
Annual fees			
– Least developed countries	2,000 CHF		500 CHF
– Developing countries	4,000 CHF		1,500 CHF
– Industrialized countries	8,000 CHF		2,000 CHF
– Non-postal members	2,000 CHF		2,500 CHF

<i>Current DMAB membership fee structure</i>		<i>Proposed DMAB membership fee structure</i>
Joining fee		
– Postal members	2,500 CHF	2,000 CHF
– Non-postal members	2,500 CHF	3,000 CHF

- 25 Were this proposed new DMAB membership fee structure to be approved, would your organization be willing to join the UPU DMAB?
- Yes    No
- 

**Part F: Miscellaneous**

- 26 Does your organization have any partnerships with other direct mail and digital marketing companies?
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- 27 Would your organization be willing to share with the UPU some case studies that show how enterprises are using your direct mail and digital marketing services/products to grow their business?
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- 28 Since 2020, the UPU has organized a total of eight “Innovation Talk” webinars on a range of topics. This series was aimed, among other things, at increasing participants’ understanding of current and future trends in digital and integrated marketing, and promoting the use of direct mail and digital marketing as enablers of e-commerce and digital transformation (see [www.upu.int/en/Universal-Postal-Union/About-UPU/Cooperatives-Boards/Direct-Marketing-Advisory-Board#activities](http://www.upu.int/en/Universal-Postal-Union/About-UPU/Cooperatives-Boards/Direct-Marketing-Advisory-Board#activities)). Please suggest any three topics of interest to your organization around which you would like future such webinars to be organized:

- 29 Would you be willing to participate in follow-up interview sessions to clarify any issues regarding your response to this survey and to explore the unique value proposition of the DMAB?
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Thank you very much for completing this survey.