
Direct

List Industry Study

2004

- Investigation conducted exclusively for *Direct*.
- Methodology, data collection and analysis by Primedia Business Magazines & Media Marketing Research Department.
- Data collected July 28 through August 13, 2004.
- Methodology conforms to accepted marketing research methods, practices and procedures.

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Objectives & Methodology

Objectives:

Objectives of this study effort include:

1. Compare business practices of list vendors 2004 vs. 2003.
2. Compare list usages of direct marketers 2004 vs. 2003.
3. Investigate and compare results by key demographics.

Methodology

E-mail Survey.

Sample framework

On July 28, 2004, Primedia Business e-mailed invitations to participate in an online survey to a total of 18,980 subscribers of *Direct*. Specifically selected were subscribers indicating their job function as List Brokers and List Managers; and job titles who sell or use lists.

Response motivation

To encourage prompt response and increase the response rate overall, the following marketing research techniques were used:

- A drawing was held for four \$50 Amazon.com gift certificates.
- A link was included on the invitation to route respondents directly to the questionnaire.
- The magazine name was used on the invitation to tie the study effort to the magazine.
- A follow-up e-mail to non-respondents was sent on August 4, 2004 to this same group.

Survey instruments

Copies of the invitations and questionnaire are included in Appendix C.

Sample Statistics

A.	Total mailing	18,980
B.	Bouncebacks/undeliverables	1,300
C.	Effective mailing (A-B)	17,680
D.	Incomplete surveys.....	13
E.	Completed surveys	730
F.	Effective response rate.....	4.1%

Data Tables

QA. Which best describes your situation?

Base = all respondents.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
I work for a direct marketing list vendor	31	21	58	31	53	12	111
	12.9%	9.4%	27.4%	16.5%	18.0%	7.5%	15.2%
I work for a company that markets products and/or services using direct marketing	175	175	112	111	203	121	489
	72.9%	78.1%	52.8%	59.0%	69.0%	75.6%	67.0%
Other (see Appendix A)	31	27	42	45	37	26	125
	12.9%	12.1%	19.8%	23.9%	12.6%	16.3%	17.1%
No answer	3	1	0	1	1	1	5
	1.3%	.4%	.0%	.5%	.3%	.6%	.7%
Total	240	224	212	188	294	160	730
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q1. Compared to 2003, how has your list rental revenue changed in 2004?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	15	7	35	15	30	5	58
	48.4%	33.3%	60.3%	48.4%	56.6%	41.7%	52.3%
Decreased	5	6	12	8	9	3	23
	16.1%	28.6%	20.7%	25.8%	17.0%	25.0%	20.7%
Stayed the same	9	5	7	4	12	3	21
	29.0%	23.8%	12.1%	12.9%	22.6%	25.0%	18.9%
Unsure	1	1	3	1	1	1	5
	3.2%	4.8%	5.2%	3.2%	1.9%	8.3%	4.5%
No answer	1	2	1	3	1	0	4
	3.2%	9.5%	1.7%	9.7%	1.9%	.0%	3.6%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q2. Again, compared to 2003, how has your list rental revenue changed in 2004 for each of the following types of lists?

Traditional mail

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	15	8	33	15	29	5	56
	48.4%	38.1%	56.9%	48.4%	54.7%	41.7%	50.5%
Decreased	5	7	9	7	8	3	21
	16.1%	33.3%	15.5%	22.6%	15.1%	25.0%	18.9%
Stayed the same	8	5	11	6	14	3	24
	25.8%	23.8%	19.0%	19.4%	26.4%	25.0%	21.6%
Do not rent	0	0	1	0	1	0	1
	.0%	.0%	1.7%	.0%	1.9%	.0%	.9%
Unsure	0	0	3	1	0	1	3
	.0%	.0%	5.2%	3.2%	.0%	8.3%	2.7%
No answer	3	1	1	2	1	0	6
	9.7%	4.8%	1.7%	6.5%	1.9%	.0%	5.4%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q2. Again, compared to 2003, how has your list rental revenue changed in 2004 for each of the following types of lists?

E-mail

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	6	7	22	7	19	3	35
	19.4%	33.3%	37.9%	22.6%	35.8%	25.0%	31.5%
Decreased	2	7	18	9	16	1	27
	6.5%	33.3%	31.0%	29.0%	30.2%	8.3%	24.3%
Stayed the same	4	3	10	7	8	2	17
	12.9%	14.3%	17.2%	22.6%	15.1%	16.7%	15.3%
Do not rent	13	3	5	6	6	5	21
	41.9%	14.3%	8.6%	19.4%	11.3%	41.7%	18.9%
Unsure	2	0	2	0	2	1	4
	6.5%	.0%	3.4%	.0%	3.8%	8.3%	3.6%
No answer	4	1	1	2	2	0	7
	12.9%	4.8%	1.7%	6.5%	3.8%	.0%	6.3%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q2. Again, compared to 2003, how has your list rental revenue changed in 2004 for each of the following types of lists?

Telephone

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	4	8	10	8	10	1	22
	12.9%	38.1%	17.2%	25.8%	18.9%	8.3%	19.8%
Decreased	3	5	24	11	14	3	32
	9.7%	23.8%	41.4%	35.5%	26.4%	25.0%	28.8%
Stayed the same	5	4	13	5	14	2	22
	16.1%	19.0%	22.4%	16.1%	26.4%	16.7%	19.8%
Do not rent	13	2	6	5	10	4	21
	41.9%	9.5%	10.3%	16.1%	18.9%	33.3%	18.9%
Unsure	3	1	4	0	4	2	8
	9.7%	4.8%	6.9%	.0%	7.5%	16.7%	7.2%
No answer	3	1	1	2	1	0	6
	9.7%	4.8%	1.7%	6.5%	1.9%	.0%	5.4%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q3a. Which of these services do you offer to your customers?

Base = direct marketing list vendors; multiple answer.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Modeling	23	3	43	15	32	12	70
	74.2%	14.3%	74.1%	48.4%	60.4%	100.0%	63.1%
Analytics	20	4	41	16	29	11	66
	64.5%	19.0%	70.7%	51.6%	54.7%	91.7%	59.5%
Campaign Management	19	9	41	18	35	10	70
	61.3%	42.9%	70.7%	58.1%	66.0%	83.3%	63.1%
None of the above	3	9	9	8	12	0	21
	9.7%	42.9%	15.5%	25.8%	22.6%	.0%	18.9%
No answer	0	1	1	2	0	0	2
	.0%	4.8%	1.7%	6.5%	.0%	.0%	1.8%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q3b. For each service that you offer, please indicate how client usage has changed in 2004 as compared to 2003.

Modeling

Base = direct marketing list vendors offering modeling, analytics or campaign management.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	13	1	24	7	18	10	38
	46.4%	8.3%	49.0%	30.4%	43.9%	83.3%	42.2%
Decreased	1	1	5	5	0	0	7
	3.6%	8.3%	10.2%	21.7%	.0%	.0%	7.8%
Stayed the same	6	1	12	4	11	1	20
	21.4%	8.3%	24.5%	17.4%	26.8%	8.3%	22.2%
Do not offer	2	4	3	2	5	0	9
	7.1%	33.3%	6.1%	8.7%	12.2%	.0%	10.0%
Unsure	3	1	3	0	4	1	7
	10.7%	8.3%	6.1%	.0%	9.8%	8.3%	7.8%
No answer	3	4	2	5	3	0	9
	10.7%	33.3%	4.1%	21.7%	7.3%	.0%	10.0%
Total	28	12	49	23	41	12	90
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q3b. For each service that you offer, please indicate how client usage has changed in 2004 as compared to 2003.

Analytics

Base = direct marketing list vendors offering modeling, analytics or campaign management.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	9	0	27	8	14	9	37
	32.1%	.0%	55.1%	34.8%	34.1%	75.0%	41.1%
Decreased	0	1	2	2	1	0	3
	.0%	8.3%	4.1%	8.7%	2.4%	.0%	3.3%
Stayed the same	8	3	11	6	13	1	22
	28.6%	25.0%	22.4%	26.1%	31.7%	8.3%	24.4%
Do not offer	5	4	3	3	5	0	12
	17.9%	33.3%	6.1%	13.0%	12.2%	.0%	13.3%
Unsure	3	1	3	0	4	1	7
	10.7%	8.3%	6.1%	.0%	9.8%	8.3%	7.8%
No answer	3	3	3	4	4	1	9
	10.7%	25.0%	6.1%	17.4%	9.8%	8.3%	10.0%
Total	28	12	49	23	41	12	90
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q3b. For each service that you offer, please indicate how client usage has changed in 2004 as compared to 2003.

Campaign Management

Base = direct marketing list vendors offering modeling, analytics or campaign management.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	8	3	23	9	14	8	34
	28.6%	25.0%	46.9%	39.1%	34.1%	66.7%	37.8%
Decreased	0	2	4	2	4	0	6
	.0%	16.7%	8.2%	8.7%	9.8%	.0%	6.7%
Stayed the same	8	4	12	8	13	1	25
	28.6%	33.3%	24.5%	34.8%	31.7%	8.3%	27.8%
Do not offer	7	2	2	2	5	1	11
	25.0%	16.7%	4.1%	8.7%	12.2%	8.3%	12.2%
Unsure	3	1	4	0	4	1	8
	10.7%	8.3%	8.2%	.0%	9.8%	8.3%	8.9%
No answer	2	0	4	2	1	1	6
	7.1%	.0%	8.2%	8.7%	2.4%	8.3%	6.7%
Total	28	12	49	23	41	12	90
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q4. As compared to 2003, how has the percent of revenue that selects and other running charges generate changed in 2004?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	14	7	23	14	25	1	45
	45.2%	33.3%	39.7%	45.2%	47.2%	8.3%	40.5%
Decreased	2	2	6	4	4	1	10
	6.5%	9.5%	10.3%	12.9%	7.5%	8.3%	9.0%
Stayed the same	9	10	20	12	17	8	39
	29.0%	47.6%	34.5%	38.7%	32.1%	66.7%	35.1%
Unsure	5	2	9	1	6	2	16
	16.1%	9.5%	15.5%	3.2%	11.3%	16.7%	14.4%
No answer	1	0	0	0	1	0	1
	3.2%	.0%	.0%	.0%	1.9%	.0%	.9%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q5. As compared to 2003, how has the total volume of names rented changed in 2004?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	19	10	37	18	35	5	67
	61.3%	47.6%	63.8%	58.1%	66.0%	41.7%	60.4%
Decreased	4	8	13	10	8	3	25
	12.9%	38.1%	22.4%	32.3%	15.1%	25.0%	22.5%
Stayed the same	6	2	5	3	7	3	13
	19.4%	9.5%	8.6%	9.7%	13.2%	25.0%	11.7%
Unsure	1	1	3	0	2	1	5
	3.2%	4.8%	5.2%	.0%	3.8%	8.3%	4.5%
No answer	1	0	0	0	1	0	1
	3.2%	.0%	.0%	.0%	1.9%	.0%	.9%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q6. What changes have you witnessed in your clients' use of response lists versus compiled files in 2004 as compared to 2003?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Both have increased	8	3	13	5	14	2	25
	25.8%	14.3%	22.4%	16.1%	26.4%	16.7%	22.5%
Response lists have increased, compiled have decreased	9	8	17	9	19	4	34
	29.0%	38.1%	29.3%	29.0%	35.8%	33.3%	30.6%
Compiled have increased, response lists have decreased	2	3	14	6	7	3	19
	6.5%	14.3%	24.1%	19.4%	13.2%	25.0%	17.1%
Both have been flat	5	3	7	7	7	1	15
	16.1%	14.3%	12.1%	22.6%	13.2%	8.3%	13.5%
Both have decreased	1	3	6	3	4	1	10
	3.2%	14.3%	10.3%	9.7%	7.5%	8.3%	9.0%
No answer	6	1	1	1	2	1	8
	19.4%	4.8%	1.7%	3.2%	3.8%	8.3%	7.2%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q7. How has the percentage of list test versus continuations changed in 2004 as compared to 2003?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
More test lists are being used	11	6	24	14	18	6	42
	35.5%	28.6%	41.4%	45.2%	34.0%	50.0%	37.8%
More continuations are being used	14	7	15	5	20	5	36
	45.2%	33.3%	25.9%	16.1%	37.7%	41.7%	32.4%
The percentage of each has remained constant	5	8	18	12	15	1	31
	16.1%	38.1%	31.0%	38.7%	28.3%	8.3%	27.9%
No answer	1	0	1	0	0	0	2
	3.2%	.0%	1.7%	.0%	.0%	.0%	1.8%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q8. As compared to 2003, how has the volume of new lists coming on to the market changed in 2004?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Volume of new lists is higher	11	5	10	7	16	0	27
	35.5%	23.8%	17.2%	22.6%	30.2%	.0%	24.3%
Volume of new lists is lower	14	10	26	15	23	6	50
	45.2%	47.6%	44.8%	48.4%	43.4%	50.0%	45.0%
Volume of new lists remains the same	5	5	20	7	14	6	30
	16.1%	23.8%	34.5%	22.6%	26.4%	50.0%	27.0%
No answer	1	1	2	2	0	0	4
	3.2%	4.8%	3.4%	6.5%	.0%	.0%	3.6%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q9. Again as compared to 2003, how has the volume of lists being taken off the market changed in 2004?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Volume of lists taken off market is higher	6 19.4%	7 33.3%	11 19.0%	4 12.9%	14 26.4%	3 25.0%	24 21.6%
Volume of lists taken off market is lower	3 9.7%	1 4.8%	4 6.9%	3 9.7%	4 7.5%	0 .0%	9 8.1%
Volume of lists taken off market remains the same	19 61.3%	12 57.1%	40 69.0%	22 71.0%	32 60.4%	9 75.0%	71 64.0%
No answer	3 9.7%	1 4.8%	3 5.2%	2 6.5%	3 5.7%	0 .0%	7 6.3%
Total	31 100.0%	21 100.0%	58 100.0%	31 100.0%	53 100.0%	12 100.0%	111 100.0%

Data Tables

Q10. How has your clients' use of insert media changed in 2004 as compared to 2003?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Use of insert media has increased	6	0	9	4	8	1	15
	19.4%	.0%	15.5%	12.9%	15.1%	8.3%	13.5%
Use of insert media has decreased	3	1	3	1	4	1	7
	9.7%	4.8%	5.2%	3.2%	7.5%	8.3%	6.3%
Use of insert media has remained the same	5	3	16	3	14	4	24
	16.1%	14.3%	27.6%	9.7%	26.4%	33.3%	21.6%
Don't offer insert media	15	17	28	22	27	5	61
	48.4%	81.0%	48.3%	71.0%	50.9%	41.7%	55.0%
No answer	2	0	2	1	0	1	4
	6.5%	.0%	3.4%	3.2%	.0%	8.3%	3.6%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q11. If your clients are using more insert media, is the additional spending coming from traditional list rental budgets?

Base = direct marketing list vendors with clients whose use of insert media has increased.	List types used/sold		Annual revenue			Total
	Consumer	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Yes, it is coming from list rental budgets	3	5	2	4	1	8
	50.0%	55.6%	50.0%	50.0%	100.0%	53.3%
No, it is not coming from list rental budgets	3	4	2	4	0	7
	50.0%	44.4%	50.0%	50.0%	.0%	46.7%
Total	6	9	4	8	1	15
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q12. How has the volume of names your clients are ordering for the holiday 2004 season changed, compared with the holiday 2003 season?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	6	1	13	4	10	4	20
	19.4%	4.8%	22.4%	12.9%	18.9%	33.3%	18.0%
Decreased	3	1	5	1	6	1	9
	9.7%	4.8%	8.6%	3.2%	11.3%	8.3%	8.1%
Stayed the same	2	2	5	3	4	1	9
	6.5%	9.5%	8.6%	9.7%	7.5%	8.3%	8.1%
Too soon to tell	16	10	29	20	27	5	56
	51.6%	47.6%	50.0%	64.5%	50.9%	41.7%	50.5%
Unsure	3	4	3	2	3	1	10
	9.7%	19.0%	5.2%	6.5%	5.7%	8.3%	9.0%
No answer	1	3	3	1	3	0	7
	3.2%	14.3%	5.2%	3.2%	5.7%	.0%	6.3%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Base = direct marketing list vendors.	Automotive	B-to-B Products	B-to-B Services	Financial/ Insurance	Health Care	Pharmaceutical	Publishing	Retail Catalog	Telecom- munications	Utilities (Non-telecom)	Other (see Appendix A)
Increased	13	33	36	45	35	26	29	24	15	12	14
	11.7%	29.7%	32.4%	40.5%	31.5%	23.4%	26.1%	21.6%	13.5%	10.8%	12.6%
Decreased	7	16	12	9	10	6	19	17	15	4	3
	6.3%	14.4%	10.8%	8.1%	9.0%	5.4%	17.1%	15.3%	13.5%	3.6%	2.7%
Stayed the same	15	23	18	14	13	9	23	24	19	15	2
	13.5%	20.7%	16.2%	12.6%	11.7%	8.1%	20.7%	21.6%	17.1%	13.5%	1.8%
Do not serve	53	24	29	24	36	49	19	23	38	56	27
	47.7%	21.6%	26.1%	21.6%	32.4%	44.1%	17.1%	20.7%	34.2%	50.5%	24.3%
Unsure	9	7	7	8	9	10	11	13	13	11	18
	8.1%	6.3%	6.3%	7.2%	8.1%	9.0%	9.9%	11.7%	11.7%	9.9%	16.2%
No answer	14	8	9	11	8	11	10	10	11	13	47
	12.6%	7.2%	8.1%	9.9%	7.2%	9.9%	9.0%	9.0%	9.9%	11.7%	42.3%
Total	111	111	111	111	111	111	111	111	111	111	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Automotive

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	3	1	8	3	6	1	13
	9.7%	4.8%	13.8%	9.7%	11.3%	8.3%	11.7%
Decreased	2	0	5	4	3	0	7
	6.5%	.0%	8.6%	12.9%	5.7%	.0%	6.3%
Stayed the same	2	1	12	4	7	3	15
	6.5%	4.8%	20.7%	12.9%	13.2%	25.0%	13.5%
Do not serve	19	15	19	15	28	5	53
	61.3%	71.4%	32.8%	48.4%	52.8%	41.7%	47.7%
Unsure	3	1	5	1	3	2	9
	9.7%	4.8%	8.6%	3.2%	5.7%	16.7%	8.1%
No answer	2	3	9	4	6	1	14
	6.5%	14.3%	15.5%	12.9%	11.3%	8.3%	12.6%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

B-to-B Products

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	3	5	25	6	17	5	33
	9.7%	23.8%	43.1%	19.4%	32.1%	41.7%	29.7%
Decreased	1	6	9	8	8	0	16
	3.2%	28.6%	15.5%	25.8%	15.1%	.0%	14.4%
Stayed the same	5	5	12	7	12	2	23
	16.1%	23.8%	20.7%	22.6%	22.6%	16.7%	20.7%
Do not serve	17	3	4	7	12	3	24
	54.8%	14.3%	6.9%	22.6%	22.6%	25.0%	21.6%
Unsure	3	1	3	1	2	1	7
	9.7%	4.8%	5.2%	3.2%	3.8%	8.3%	6.3%
No answer	2	1	5	2	2	1	8
	6.5%	4.8%	8.6%	6.5%	3.8%	8.3%	7.2%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

B-to-B Services

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	3	6	27	10	17	5	36
	9.7%	28.6%	46.6%	32.3%	32.1%	41.7%	32.4%
Decreased	0	5	7	8	4	0	12
	.0%	23.8%	12.1%	25.8%	7.5%	.0%	10.8%
Stayed the same	3	4	10	3	9	3	18
	9.7%	19.0%	17.2%	9.7%	17.0%	25.0%	16.2%
Do not serve	20	3	6	7	17	3	29
	64.5%	14.3%	10.3%	22.6%	32.1%	25.0%	26.1%
Unsure	3	1	3	1	2	1	7
	9.7%	4.8%	5.2%	3.2%	3.8%	8.3%	6.3%
No answer	2	2	5	2	4	0	9
	6.5%	9.5%	8.6%	6.5%	7.5%	.0%	8.1%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Financial/Insurance

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	11	7	26	12	24	3	45
	35.5%	33.3%	44.8%	38.7%	45.3%	25.0%	40.5%
Decreased	1	3	5	4	5	0	9
	3.2%	14.3%	8.6%	12.9%	9.4%	.0%	8.1%
Stayed the same	1	3	10	4	9	1	14
	3.2%	14.3%	17.2%	12.9%	17.0%	8.3%	12.6%
Do not serve	12	4	8	6	10	5	24
	38.7%	19.0%	13.8%	19.4%	18.9%	41.7%	21.6%
Unsure	3	1	4	1	2	2	8
	9.7%	4.8%	6.9%	3.2%	3.8%	16.7%	7.2%
No answer	3	3	5	4	3	1	11
	9.7%	14.3%	8.6%	12.9%	5.7%	8.3%	9.9%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Health Care

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	7	8	20	10	20	1	35
	22.6%	38.1%	34.5%	32.3%	37.7%	8.3%	31.5%
Decreased	3	1	6	3	6	1	10
	9.7%	4.8%	10.3%	9.7%	11.3%	8.3%	9.0%
Stayed the same	0	5	8	4	6	2	13
	.0%	23.8%	13.8%	12.9%	11.3%	16.7%	11.7%
Do not serve	16	5	15	11	17	5	36
	51.6%	23.8%	25.9%	35.5%	32.1%	41.7%	32.4%
Unsure	3	1	4	1	2	2	9
	9.7%	4.8%	6.9%	3.2%	3.8%	16.7%	8.1%
No answer	2	1	5	2	2	1	8
	6.5%	4.8%	8.6%	6.5%	3.8%	8.3%	7.2%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Pharmaceutical

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	3	4	19	7	13	2	26
	9.7%	19.0%	32.8%	22.6%	24.5%	16.7%	23.4%
Decreased	1	0	5	1	5	0	6
	3.2%	.0%	8.6%	3.2%	9.4%	.0%	5.4%
Stayed the same	1	3	5	3	6	0	9
	3.2%	14.3%	8.6%	9.7%	11.3%	.0%	8.1%
Do not serve	19	10	20	16	23	7	49
	61.3%	47.6%	34.5%	51.6%	43.4%	58.3%	44.1%
Unsure	4	1	4	1	2	2	10
	12.9%	4.8%	6.9%	3.2%	3.8%	16.7%	9.0%
No answer	3	3	5	3	4	1	11
	9.7%	14.3%	8.6%	9.7%	7.5%	8.3%	9.9%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Publishing

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	6	4	18	4	17	3	29
	19.4%	19.0%	31.0%	12.9%	32.1%	25.0%	26.1%
Decreased	3	5	11	9	6	2	19
	9.7%	23.8%	19.0%	29.0%	11.3%	16.7%	17.1%
Stayed the same	7	4	12	6	15	2	23
	22.6%	19.0%	20.7%	19.4%	28.3%	16.7%	20.7%
Do not serve	9	4	6	7	9	2	19
	29.0%	19.0%	10.3%	22.6%	17.0%	16.7%	17.1%
Unsure	4	1	6	2	3	2	11
	12.9%	4.8%	10.3%	6.5%	5.7%	16.7%	9.9%
No answer	2	3	5	3	3	1	10
	6.5%	14.3%	8.6%	9.7%	5.7%	8.3%	9.0%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Retail Catalog

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	8	2	14	7	8	7	24
	25.8%	9.5%	24.1%	22.6%	15.1%	58.3%	21.6%
Decreased	4	3	10	5	11	1	17
	12.9%	14.3%	17.2%	16.1%	20.8%	8.3%	15.3%
Stayed the same	5	4	15	6	13	1	24
	16.1%	19.0%	25.9%	19.4%	24.5%	8.3%	21.6%
Do not serve	8	8	7	9	11	1	23
	25.8%	38.1%	12.1%	29.0%	20.8%	8.3%	20.7%
Unsure	4	1	7	1	7	1	13
	12.9%	4.8%	12.1%	3.2%	13.2%	8.3%	11.7%
No answer	2	3	5	3	3	1	10
	6.5%	14.3%	8.6%	9.7%	5.7%	8.3%	9.0%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Telecommunications

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	3	2	10	5	8	1	15
	9.7%	9.5%	17.2%	16.1%	15.1%	8.3%	13.5%
Decreased	2	1	12	7	5	1	15
	6.5%	4.8%	20.7%	22.6%	9.4%	8.3%	13.5%
Stayed the same	4	5	10	5	10	2	19
	12.9%	23.8%	17.2%	16.1%	18.9%	16.7%	17.1%
Do not serve	16	9	13	10	21	4	38
	51.6%	42.9%	22.4%	32.3%	39.6%	33.3%	34.2%
Unsure	4	1	7	1	5	3	13
	12.9%	4.8%	12.1%	3.2%	9.4%	25.0%	11.7%
No answer	2	3	6	3	4	1	11
	6.5%	14.3%	10.3%	9.7%	7.5%	8.3%	9.9%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Utilities (Non-telecom)

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	1	2	9	4	5	1	12
	3.2%	9.5%	15.5%	12.9%	9.4%	8.3%	10.8%
Decreased	0	1	3	3	1	0	4
	.0%	4.8%	5.2%	9.7%	1.9%	.0%	3.6%
Stayed the same	0	5	9	3	9	2	15
	.0%	23.8%	15.5%	9.7%	17.0%	16.7%	13.5%
Do not serve	22	9	25	16	29	6	56
	71.0%	42.9%	43.1%	51.6%	54.7%	50.0%	50.5%
Unsure	5	1	5	1	4	2	11
	16.1%	4.8%	8.6%	3.2%	7.5%	16.7%	9.9%
No answer	3	3	7	4	5	1	13
	9.7%	14.3%	12.1%	12.9%	9.4%	8.3%	11.7%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same.

Other (see Appendix A)

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	2	1	11	6	6	1	14
	6.5%	4.8%	19.0%	19.4%	11.3%	8.3%	12.6%
Decreased	1	1	1	1	2	0	3
	3.2%	4.8%	1.7%	3.2%	3.8%	.0%	2.7%
Stayed the same	0	1	1	1	1	0	2
	.0%	4.8%	1.7%	3.2%	1.9%	.0%	1.8%
Do not serve	15	3	9	4	13	8	27
	48.4%	14.3%	15.5%	12.9%	24.5%	66.7%	24.3%
Unsure	5	2	10	3	8	1	18
	16.1%	9.5%	17.2%	9.7%	15.1%	8.3%	16.2%
No answer	8	13	26	16	23	2	47
	25.8%	61.9%	44.8%	51.6%	43.4%	16.7%	42.3%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q14. From which of the following do you generate list orders?

Base = direct marketing list vendors; multiple answer.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Directly from the mailer	25	19	53	29	45	12	98
	80.6%	90.5%	91.4%	93.5%	84.9%	100.0%	88.3%
Ad Agency	14	14	44	22	36	8	73
	45.2%	66.7%	75.9%	71.0%	67.9%	66.7%	65.8%
List Broker	21	18	36	23	36	7	75
	67.7%	85.7%	62.1%	74.2%	67.9%	58.3%	67.6%
Other (see Appendix A)	1	2	1	1	2	0	4
	3.2%	9.5%	1.7%	3.2%	3.8%	.0%	3.6%
No answer	1	0	1	1	0	0	2
	3.2%	.0%	1.7%	3.2%	.0%	.0%	1.8%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q15a. Have you observed any new sectors or industries that have begun purchasing lists in 2004?

Base = direct marketing list vendors.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
No	21	16	42	25	34	10	80
	67.7%	76.2%	72.4%	80.6%	64.2%	83.3%	72.1%
Yes	9	4	15	6	18	2	28
	29.0%	19.0%	25.9%	19.4%	34.0%	16.7%	25.2%
No answer	1	1	1	0	1	0	3
	3.2%	4.8%	1.7%	.0%	1.9%	.0%	2.7%
Total	31	21	58	31	53	12	111
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q16. Compared to 2003, how has your list rental use changed in 2004 for each of the following types of lists?

Traditional mail

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	70	62	40	37	85	38	179
	40.0%	35.4%	35.7%	33.3%	41.9%	31.4%	36.6%
Decreased	35	46	21	22	49	23	105
	20.0%	26.3%	18.8%	19.8%	24.1%	19.0%	21.5%
Stayed the same	50	47	41	35	53	40	144
	28.6%	26.9%	36.6%	31.5%	26.1%	33.1%	29.4%
Do not use	14	15	4	12	11	13	40
	8.0%	8.6%	3.6%	10.8%	5.4%	10.7%	8.2%
Unsure	6	3	5	4	4	6	18
	3.4%	1.7%	4.5%	3.6%	2.0%	5.0%	3.7%
No answer	0	2	1	1	1	1	3
	.0%	1.1%	.9%	.9%	.5%	.8%	.6%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q16. Compared to 2003, how has your list rental use changed in 2004 for each of the following types of lists?

E-mail

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	66	78	46	45	83	52	200
	37.7%	44.6%	41.1%	40.5%	40.9%	43.0%	40.9%
Decreased	9	8	6	4	9	8	23
	5.1%	4.6%	5.4%	3.6%	4.4%	6.6%	4.7%
Stayed the same	31	36	27	26	42	18	96
	17.7%	20.6%	24.1%	23.4%	20.7%	14.9%	19.6%
Do not use	59	48	26	30	59	34	142
	33.7%	27.4%	23.2%	27.0%	29.1%	28.1%	29.0%
Unsure	8	3	5	3	6	8	19
	4.6%	1.7%	4.5%	2.7%	3.0%	6.6%	3.9%
No answer	2	2	2	3	4	1	9
	1.1%	1.1%	1.8%	2.7%	2.0%	.8%	1.8%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q16. Compared to 2003, how has your list rental use changed in 2004 for each of the following types of lists?

Telephone

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	20	40	17	12	35	23	80
	11.4%	22.9%	15.2%	10.8%	17.2%	19.0%	16.4%
Decreased	21	11	12	10	16	13	45
	12.0%	6.3%	10.7%	9.0%	7.9%	10.7%	9.2%
Stayed the same	31	46	24	29	41	26	109
	17.7%	26.3%	21.4%	26.1%	20.2%	21.5%	22.3%
Do not use	96	70	49	52	101	50	224
	54.9%	40.0%	43.8%	46.8%	49.8%	41.3%	45.8%
Unsure	5	5	6	4	5	7	19
	2.9%	2.9%	5.4%	3.6%	2.5%	5.8%	3.9%
No answer	2	3	4	4	5	2	12
	1.1%	1.7%	3.6%	3.6%	2.5%	1.7%	2.5%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q17a. Which of these services does your company use?

Base = direct marketers; multiple answer.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Modeling	94	42	34	21	68	70	180
	53.7%	24.0%	30.4%	18.9%	33.5%	57.9%	36.8%
Analytics	81	50	46	25	72	67	185
	46.3%	28.6%	41.1%	22.5%	35.5%	55.4%	37.8%
Campaign Management	89	78	48	44	82	79	226
	50.9%	44.6%	42.9%	39.6%	40.4%	65.3%	46.2%
None of the above	43	68	45	55	77	15	167
	24.6%	38.9%	40.2%	49.5%	37.9%	12.4%	34.2%
No answer	1	1	0	0	0	2	2
	.6%	.6%	.0%	.0%	.0%	1.7%	.4%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q17b. For each service that you use, please indicate how your usage has changed in 2004 as compared to 2003.

Modeling

Base = direct marketers using modeling, analytics or campaign management.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	48	21	22	7	36	42	95
	36.4%	19.6%	32.8%	12.5%	28.6%	39.6%	29.5%
Decreased	3	2	2	2	3	2	7
	2.3%	1.9%	3.0%	3.6%	2.4%	1.9%	2.2%
Stayed the same	40	28	15	15	37	27	86
	30.3%	26.2%	22.4%	26.8%	29.4%	25.5%	26.7%
Do not use	23	38	18	21	39	18	81
	17.4%	35.5%	26.9%	37.5%	31.0%	17.0%	25.2%
Unsure	7	3	2	2	2	6	16
	5.3%	2.8%	3.0%	3.6%	1.6%	5.7%	5.0%
No answer	11	15	8	9	9	11	37
	8.3%	14.0%	11.9%	16.1%	7.1%	10.4%	11.5%
Total	132	107	67	56	126	106	322
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q17b. For each service that you use, please indicate how your usage has changed in 2004 as compared to 2003.

Analytics

Base = direct marketers using modeling, analytics or campaign management.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	50	28	31	13	44	44	110
	37.9%	26.2%	46.3%	23.2%	34.9%	41.5%	34.2%
Decreased	0	0	2	0	2	0	2
	.0%	.0%	3.0%	.0%	1.6%	.0%	.6%
Stayed the same	36	30	18	17	35	29	90
	27.3%	28.0%	26.9%	30.4%	27.8%	27.4%	28.0%
Do not use	23	31	9	13	32	18	65
	17.4%	29.0%	13.4%	23.2%	25.4%	17.0%	20.2%
Unsure	6	3	3	3	1	5	16
	4.5%	2.8%	4.5%	5.4%	.8%	4.7%	5.0%
No answer	17	15	4	10	12	10	39
	12.9%	14.0%	6.0%	17.9%	9.5%	9.4%	12.1%
Total	132	107	67	56	126	106	322
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q17b. For each service that you use, please indicate how your usage has changed in 2004 as compared to 2003.

Campaign Management

Base = direct marketers using modeling, analytics or campaign management.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	39	38	32	21	47	38	111
	29.5%	35.5%	47.8%	37.5%	37.3%	35.8%	34.5%
Decreased	1	1	1	1	1	0	3
	.8%	.9%	1.5%	1.8%	.8%	.0%	.9%
Stayed the same	47	43	20	22	41	44	117
	35.6%	40.2%	29.9%	39.3%	32.5%	41.5%	36.3%
Do not use	21	15	9	5	23	11	46
	15.9%	14.0%	13.4%	8.9%	18.3%	10.4%	14.3%
Unsure	4	2	1	2	0	2	11
	3.0%	1.9%	1.5%	3.6%	.0%	1.9%	3.4%
No answer	20	8	4	5	14	11	34
	15.2%	7.5%	6.0%	8.9%	11.1%	10.4%	10.6%
Total	132	107	67	56	126	106	322
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q18. As compared to 2003, how has the total volume of names you've rented changed in 2004?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	79	78	51	49	86	53	213
	45.1%	44.6%	45.5%	44.1%	42.4%	43.8%	43.6%
Decreased	33	34	17	14	43	16	85
	18.9%	19.4%	15.2%	12.6%	21.2%	13.2%	17.4%
Stayed the same	55	50	36	38	65	35	149
	31.4%	28.6%	32.1%	34.2%	32.0%	28.9%	30.5%
Unsure	8	12	8	7	9	17	39
	4.6%	6.9%	7.1%	6.3%	4.4%	14.0%	8.0%
No answer	0	1	0	3	0	0	3
	.0%	.6%	.0%	2.7%	.0%	.0%	.6%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q19. How has your use of compiled files versus response lists in 2004 as compared to 2003?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Both have increased	39	41	34	25	49	34	119
	22.3%	23.4%	30.4%	22.5%	24.1%	28.1%	24.3%
Response lists have increased, compiled have decreased	36	24	22	24	34	20	85
	20.6%	13.7%	19.6%	21.6%	16.7%	16.5%	17.4%
Compiled have increased, response lists have decreased	17	27	13	14	26	13	58
	9.7%	15.4%	11.6%	12.6%	12.8%	10.7%	11.9%
Both have been flat	55	54	34	37	64	35	151
	31.4%	30.9%	30.4%	33.3%	31.5%	28.9%	30.9%
Both have decreased	17	20	6	5	23	8	44
	9.7%	11.4%	5.4%	4.5%	11.3%	6.6%	9.0%
No answer	11	9	3	6	7	11	32
	6.3%	5.1%	2.7%	5.4%	3.4%	9.1%	6.5%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q20. As compared to 2003, how has the percent of your list expenses generated by selects and other running charges changed in 2004?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Percentage has increased	69	57	41	40	77	34	172
	39.4%	32.6%	36.6%	36.0%	37.9%	28.1%	35.2%
Percentage has decreased	24	18	7	12	17	16	50
	13.7%	10.3%	6.3%	10.8%	8.4%	13.2%	10.2%
Percentage has remained the same	76	94	61	53	106	62	243
	43.4%	53.7%	54.5%	47.7%	52.2%	51.2%	49.7%
No answer	6	6	3	6	3	9	24
	3.4%	3.4%	2.7%	5.4%	1.5%	7.4%	4.9%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q21. How has the percentage of list tests versus continuations you use changed in 2004 as compared to 2003?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
I am using more test lists	53	46	32	26	54	42	136
	30.3%	26.3%	28.6%	23.4%	26.6%	34.7%	27.8%
I am using more continuations	38	40	22	34	40	21	102
	21.7%	22.9%	19.6%	30.6%	19.7%	17.4%	20.9%
The percentage of each has remained constant	74	77	56	45	106	45	217
	42.3%	44.0%	50.0%	40.5%	52.2%	37.2%	44.4%
No answer	10	12	2	6	3	13	34
	5.7%	6.9%	1.8%	5.4%	1.5%	10.7%	7.0%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q22. How has the percentage of house lists versus rented files changed in 2004 as compared to 2003?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
I am using more house lists	79	93	50	48	97	58	226
	45.1%	53.1%	44.6%	43.2%	47.8%	47.9%	46.2%
I am using more rented files	35	35	19	23	40	20	91
	20.0%	20.0%	17.0%	20.7%	19.7%	16.5%	18.6%
The percentage of each has remained the same	56	43	39	37	63	33	149
	32.0%	24.6%	34.8%	33.3%	31.0%	27.3%	30.5%
No answer	5	4	4	3	3	10	23
	2.9%	2.3%	3.6%	2.7%	1.5%	8.3%	4.7%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q23. Have you changed list managers in 2004?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Yes, for some files	37	33	17	22	33	22	88
	21.1%	18.9%	15.2%	19.8%	16.3%	18.2%	18.0%
Yes, for all files	12	10	5	9	11	5	27
	6.9%	5.7%	4.5%	8.1%	5.4%	4.1%	5.5%
No, have not changed	122	126	88	77	155	84	353
	69.7%	72.0%	78.6%	69.4%	76.4%	69.4%	72.2%
No answer	4	6	2	3	4	10	21
	2.3%	3.4%	1.8%	2.7%	2.0%	8.3%	4.3%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q24. How has your use of insert media changed in 2004 as compared to 2003?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Use of insert media has increased	44 25.1%	26 14.9%	24 21.4%	27 24.3%	37 18.2%	25 20.7%	95 19.4%
Use of insert media has decreased	14 8.0%	14 8.0%	4 3.6%	9 8.1%	14 6.9%	9 7.4%	34 7.0%
Use of insert media has remained the same	47 26.9%	27 15.4%	30 26.8%	21 18.9%	48 23.6%	25 20.7%	106 21.7%
Don't use insert media	66 37.7%	106 60.6%	53 47.3%	53 47.7%	103 50.7%	56 46.3%	241 49.3%
No answer	4 2.3%	2 1.1%	1 .9%	1 .9%	1 .5%	6 5.0%	13 2.7%
Total	175 100.0%	175 100.0%	112 100.0%	111 100.0%	203 100.0%	121 100.0%	489 100.0%

Data Tables

Q25. How has the volume of names you are ordering for the holiday 2004 season changed, compared with the holiday 2003 season?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	22 12.6%	14 8.0%	17 15.2%	14 12.6%	21 10.3%	16 13.2%	54 11.0%
Decreased	11 6.3%	13 7.4%	5 4.5%	7 6.3%	13 6.4%	7 5.8%	30 6.1%
Stayed the same	68 38.9%	64 36.6%	39 34.8%	34 30.6%	79 38.9%	45 37.2%	175 35.8%
Too soon to tell	49 28.0%	21 12.0%	34 30.4%	30 27.0%	45 22.2%	16 13.2%	106 21.7%
Unsure	24 13.7%	57 32.6%	15 13.4%	23 20.7%	40 19.7%	33 27.3%	108 22.1%
No answer	1 .6%	6 3.4%	2 1.8%	3 2.7%	5 2.5%	4 3.3%	16 3.3%
Total	175 100.0%	175 100.0%	112 100.0%	111 100.0%	203 100.0%	121 100.0%	489 100.0%

Data Tables

Q26. How have your response rates changed in 2004 as compared to 2003?

Base = direct marketers.	List types used/sold			Annual revenue			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	
Increased	47	69	41	39	75	36	166
	26.9%	39.4%	36.6%	35.1%	36.9%	29.8%	33.9%
Decreased	50	36	20	18	48	31	107
	28.6%	20.6%	17.9%	16.2%	23.6%	25.6%	21.9%
Stayed the same	62	49	29	30	64	40	146
	35.4%	28.0%	25.9%	27.0%	31.5%	33.1%	29.9%
Unsure	15	20	21	21	16	13	62
	8.6%	11.4%	18.8%	18.9%	7.9%	10.7%	12.7%
No answer	1	1	1	3	0	1	8
	.6%	.6%	.9%	2.7%	.0%	.8%	1.6%
Total	175	175	112	111	203	121	489
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q27. What type of company do you work for? (Table 1 of 2)

Base = all respondents.	List types used/sold			Annual revenue			Firm Type			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	List vendor	Direct marketer	Other	
Cataloger	41	15	16	7	39	26	0	73	2	76
	17.1%	6.7%	7.5%	3.7%	13.3%	16.3%	.0%	14.9%	1.6%	10.4%
Compiler	8	3	12	6	11	2	19	1	2	23
	3.3%	1.3%	5.7%	3.2%	3.7%	1.3%	17.1%	.2%	1.6%	3.2%
Communications	4	9	4	7	5	5	0	15	2	17
	1.7%	4.0%	1.9%	3.7%	1.7%	3.1%	.0%	3.1%	1.6%	2.3%
Data processor	2	1	4	4	2	2	3	2	3	8
	.8%	.4%	1.9%	2.1%	.7%	1.3%	2.7%	.4%	2.4%	1.1%
Financial services	8	4	3	1	5	8	0	14	1	15
	3.3%	1.8%	1.4%	.5%	1.7%	5.0%	.0%	2.9%	.8%	2.1%
Fulfillment	2	5	10	8	4	6	1	12	8	21
	.8%	2.2%	4.7%	4.3%	1.4%	3.8%	.9%	2.5%	6.4%	2.9%
Fundraiser (nonprofit)	5	1	1	2	3	2	0	8	0	8
	2.1%	.4%	.5%	1.1%	1.0%	1.3%	.0%	1.6%	.0%	1.1%
Healthcare	4	2	1	1	6	0	0	7	0	7
	1.7%	.9%	.5%	.5%	2.0%	.0%	.0%	1.4%	.0%	1.0%
Insurance	2	1	1	0	2	3	0	5	0	5
	.8%	.4%	.5%	.0%	.7%	1.9%	.0%	1.0%	.0%	.7%
List broker	9	5	37	20	23	3	49	0	4	53
	3.8%	2.2%	17.5%	10.6%	7.8%	1.9%	44.1%	.0%	3.2%	7.3%

Data Tables

Q27. What type of company do you work for? (Table 2 of 2)

Base = all respondents.	List types used/sold			Annual revenue			Firm Type			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	List vendor	Direct marketer	Other	
List manager	14 5.8%	6 2.7%	9 4.2%	7 3.7%	15 5.1%	3 1.9%	28 25.2%	1 .2%	0 .0%	29 4.0%
Manufacturer	6 2.5%	35 15.6%	10 4.7%	12 6.4%	20 6.8%	15 9.4%	0 .0%	38 7.8%	15 12.0%	53 7.3%
Printer	4 1.7%	7 3.1%	3 1.4%	3 1.6%	10 3.4%	2 1.3%	0 .0%	8 1.6%	8 6.4%	16 2.2%
Publisher	82 34.2%	73 32.6%	40 18.9%	47 25.0%	82 27.9%	38 23.8%	4 3.6%	178 36.4%	20 16.0%	203 27.8%
Retailer	17 7.1%	2 .9%	7 3.3%	9 4.8%	7 2.4%	11 6.9%	0 .0%	22 4.5%	7 5.6%	30 4.1%
Seminars/conferences/ trade shows	1 .4%	10 4.5%	3 1.4%	4 2.1%	9 3.1%	1 .6%	0 .0%	13 2.7%	1 .8%	14 1.9%
Telemarketer	2 .8%	1 .4%	1 .5%	3 1.6%	1 .3%	0 .0%	0 .0%	3 .6%	1 .8%	4 .5%
Wholesaler/Distributor	3 1.3%	12 5.4%	13 6.1%	5 2.7%	17 5.8%	7 4.4%	0 .0%	26 5.3%	6 4.8%	33 4.5%
Other (see Appendix A)	26 10.8%	32 14.3%	35 16.5%	40 21.3%	33 11.2%	26 16.3%	7 6.3%	62 12.7%	44 35.2%	113 15.5%
No answer	0 .0%	0 .0%	2 .9%	2 1.1%	0 .0%	0 .0%	0 .0%	1 .2%	1 .8%	2 .3%
Total	240 100.0%	224 100.0%	212 100.0%	188 100.0%	294 100.0%	160 100.0%	111 100.0%	489 100.0%	125 100.0%	730 100.0%

Data Tables

Q28. What percentage of your lists used/sold are:

Base = all respondents.	List types used/sold			Annual revenue			Firm Type			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	List vendor	Direct marketer	Other	
Consumers	240	0	0	47	97	66	31	175	31	240
	100.0%	.0%	.0%	25.0%	33.0%	41.3%	27.9%	35.8%	24.8%	32.9%
Businesses	0	224	0	56	103	46	21	175	27	224
	.0%	100.0%	.0%	29.8%	35.0%	28.8%	18.9%	35.8%	21.6%	30.7%
Combination B2B and B2C	0	0	212	71	84	36	58	112	42	212
	.0%	.0%	100.0%	37.8%	28.6%	22.5%	52.3%	22.9%	33.6%	29.0%
No answer	0	0	0	14	10	12	1	27	25	54
	.0%	.0%	.0%	7.4%	3.4%	7.5%	.9%	5.5%	20.0%	7.4%
Total	240	224	212	188	294	160	111	489	125	730
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Data Tables

Q29. What was your company's approximate total revenue in 2003?

Base = all respondents.	List types used/sold			Annual revenue			Firm Type			Total
	Consumer	Business	Combination B2B and B2C	Less than \$2.5 million	\$2.5 to \$99.9 million	\$100 million or more	List vendor	Direct marketer	Other	
Under \$250,000	20 8.3%	12 5.4%	23 10.8%	62 33.0%	0 .0%	0 .0%	6 5.4%	32 6.5%	23 18.4%	62 8.5%
\$250,000 to \$999,999	10 4.2%	17 7.6%	18 8.5%	50 26.6%	0 .0%	0 .0%	11 9.9%	31 6.3%	8 6.4%	50 6.8%
\$1.0 to \$2.49 million	17 7.1%	27 12.1%	30 14.2%	76 40.4%	0 .0%	0 .0%	14 12.6%	48 9.8%	14 11.2%	76 10.4%
\$2.5 to \$4.9 million	17 7.1%	17 7.6%	12 5.7%	0 .0%	46 15.6%	0 .0%	9 8.1%	30 6.1%	7 5.6%	46 6.3%
\$5.0 to \$9.9 million	19 7.9%	30 13.4%	17 8.0%	0 .0%	68 23.1%	0 .0%	19 17.1%	38 7.8%	11 8.8%	68 9.3%
\$10.0 to \$24.9 million	23 9.6%	26 11.6%	21 9.9%	0 .0%	75 25.5%	0 .0%	17 15.3%	51 10.4%	7 5.6%	75 10.3%
\$25.0 to \$49.9 million	16 6.7%	18 8.0%	22 10.4%	0 .0%	58 19.7%	0 .0%	3 2.7%	48 9.8%	6 4.8%	58 7.9%
\$50.0 to \$99.9 million	22 9.2%	12 5.4%	12 5.7%	0 .0%	47 16.0%	0 .0%	5 4.5%	36 7.4%	6 4.8%	47 6.4%
\$100.0 to \$499.9 million	32 13.3%	22 9.8%	12 5.7%	0 .0%	0 .0%	70 43.8%	7 6.3%	52 10.6%	10 8.0%	70 9.6%
\$500.0 to \$999.9 million	15 6.3%	12 5.4%	2 .9%	0 .0%	0 .0%	29 18.1%	0 .0%	26 5.3%	3 2.4%	29 4.0%
\$1.0 billion or more	19 7.9%	12 5.4%	22 10.4%	0 .0%	0 .0%	61 38.1%	5 4.5%	43 8.8%	13 10.4%	61 8.4%
No answer	30 12.5%	19 8.5%	21 9.9%	0 .0%	0 .0%	0 .0%	15 13.5%	54 11.0%	17 13.6%	88 12.1%
Total	240 100.0%	224 100.0%	212 100.0%	188 100.0%	294 100.0%	160 100.0%	111 100.0%	489 100.0%	125 100.0%	730 100.0%
Estimated mean (in millions)	\$203.5	\$146.2	\$154.1	\$.9	\$26.1	\$648.4	\$84.3	\$193.1	\$177.6	\$173.8
Estimated median (in millions)	\$24.9	\$9.9	\$8.8	\$.7	\$16.8	\$689.7	\$7.4	\$21.5	\$6.4	\$14.0
Number answering	N=210	N=205	N=191	N=188	N=294	N=160	N=96	N=435	N=108	N=642

Analyst note: please see "Statistics Explained" to see how estimated means/medians were calculated.

Appendix A – Write-in answers

QA. Which best describes your situation? (Other)

3pf

Ad agency; I use DM if it suits the clients needs, I design also
Agency that buys lists for clients
Business consultant for billboard production company
Catalog and internet marketing consultant
Catalog lead generation
Commercial Printer
Consultant
Consultant on marketing
Consultant to direct marketers
Consulting
Consumer Fulfillment Company
Credit Reporting Agency
CVB
Data Service and Software provider to the list brokerage industry
Database Marketing Supplier
Direct mail solution provider
Direct Marketing Agency – (3 mentions)
Direct person-to-person marketing
Direct to trade, direct marketing and internet marketing
Distribution – (2 mentions)
Equipment manufacturer
Event marketing & production
Event planner
Full service consultancy that includes List Services
Graphics Production company/design and produce dm pieces
I'm a counselor for SCORE, part of SBA-helping start new businesses
I'm working as a content manager with a blogging-project
I am a list and print broker
I am a List Broker reselling lists
I am a service provider: list procurement, mailing services etc
I am marketing columnist
I own a company that markets products using direct marketing
I own a company that markets products and services using direct marketing
I own a company that markets products and/or services
I own a full-service direct mail production company
I own a list brokerage/mgt company
I own a rep company
I own an advertising agency

I purchase direct marketing services
I sell Direct mail advertising
I work for a company that does not do direct marketing
I work for a company that is considering selling direct
I work for a company that occasionally uses direct marketing.
I work for a company that publishes marketable listings
I work for a company that sells through distributors
I work for a direct marketing insert media co.
I work for a large multi-media company
I work for a manufacturer that markets business to business
I work for a middle market retail store chain.
I work for a printing company that assists clients with direct marke
I work for a printing company.
I work for an office supplies company in the promotional products en
I work in advertising for companies that use direct marketing
Interested in direct marketing a niche market
Law Firm Marketing Dept
Legal services
List broker
Loyalty marketing
Magazine publisher
Mail and Document Management Company
Mailing & Fulfillment Service Association
Mailing Company
Manufacturer
Manufacturer/Distributor in global marketplace
Marketing at Retail
Marketing Consultant that may use the lists for my clients
Media
Membership based company, sell a service
My company is a Teleservices and Direct Marketing Agency
My company manufactures products sold through distributors
Newspaper – (3 mentions)
Order processing, credit card service.
Original equipment manufacturer
Printer
Printer in the Direct Mail industry
Printing & Fulfillment Co.
Product Fulfillment
Provide industrial real estate to direct marketing companies

Appendix A – Write-in answers

QA. Which best describes your situation? (Other, continued)

Publication/ marketing manager

Publishing – (9 mentions)

Publishing magazine for dealers to help with direct marketing

Retail Distribution Center

Retail grocery

Retailer – (3 mentions)

Service bureau

State Government - Customer Service Center

Subscriptions sales and solicitation

Supply Chain Management – (2 mentions)

University

U.S. Postal Service

U.S. Postal Service, promoting ad mail to very large mailers

Vendor of services to the direct marketing industry

We are a call center - Fulfillment house (e-commerce One Stop Shop)

We are a promotional products agency that sells direct mail ideas to

We are a sales and marketing consulting firm

We sell to the direct marketing industry

Wholesale Distribution Industrial & Safety Supplies

Wholesale distributor

Word of mouth

No answer (9)

Q13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same. (Other)

Increased:

Banks very high, but very low nets, big charities

Club and Continuities

Education, non-profits

Educational

Fundraising – (2 mentions)

Gen' retail & services

Information technology

Media, Travel & Entertainment, CPG

Non profit organizations – (2 mentions)

Online services - self serve services

Travel

No answer (1)

Decreased

Fundraising

Seminars, office products, IT products

No answer (1)

Stayed the same

General Merchandise/Consumer Products

No answer (1)

Do not serve

Apparel market has decreased due to more house file mailings

Q14. From which of the following do you generate list orders? (Other)

Co-op

Consultants

Mail houses

Website, data card listings, print publication advertising

Q15b. If [you have observed new sectors that have begun purchasing lists in 2004], please specify sectors or industries.

African American, Political fundraising.

Audio conferences

Automotive

BioTech, Pharmaceutical

Building / construction - remodeling

E-tailers

Gambling, lottery, international business

Gardening

Gymnasiums

Industrial catalogs

Internet, technology

Local franchise marketing

Media, Travel & Entertainment, CPG

More consumer

Appendix A – Write-in answers

Q15b. If [you have observed new sectors that have begun purchasing lists in 2004], please specify sectors or industries. (Continued)

More driving traffic to retail.

Pharmaceutical

Political

Private placement and venture capital firms

Retail Home Improvement mailing has increased; tourism within the US, and Home Entertainment.

Science related

Specialty Advertising Agencies and Interactive Agencies.

Stock sponsored newsletters

Student Lending

No answer (5)

Q27. What type of company do you work for? (Other)

A full-service direct mail production company

Ad Agency.

Ad Specialty Company

Agency – (2 mentions)

Association – (3 mentions)

Association Management

Brokerage and management. This should be one category!

Business Consulting

Catalog Lead Generation

CD/DVD replicator and packaging

Child Support and Food Stamps - Customer Service

Children's programs

Co-op database

Consultant – (6 mentions)

Consultant, Circulation, List Broker, List Manager, Creative

Continuity/Club Program

Convention Bureau

Cooperative database

Courier

Credit Reporting Agency

Data processor-fulfillment-printer-manufacturer-telemarketer

Data service and software provider for the list brokerage industry

Database Developer and Manager

Database Marketing Services

Direct agency

Direct mail company

Direct Marketing Agency – (3 mentions)

Direct Marketing Company of women's hosiery

Direct Marketing Services company

Direct Response Agency

Education – (4 mentions)

Educational Professional Development

Electronic media

Event marketing / Production specializing in rentals

Event planner

Full-Service Graphics production: Design/Photo/Prepress/Print

Government

Hospitality/hotel/casino entertainment

I own my own business- I direct mail for increased clientele

Industrial Real Estate Developer

Insert Media - Brokerage and Management

Internet

Incentives, Promotions, Reward & Recognition products and services

IT Services

Law Firm

Legal services

List owner/in-house manager

Loyalty Marketing

Market research

Marketing Agency

Marketing and Ad Specialty Company

Marketing and advertising consultants

Marketing Consultant

Marketing services – (2 mentions)

Marketing Support Services

Marketing/Law Firm

Membership based company

Newspaper

Nonprofit association; includes fundraising and event promotion

Outsourced management

Outsourcing Co.

Personal Services

Pitney Bowes

Print, mail, fulfillment and internet related services

Appendix A – Write-in answers

Q27. What type of company do you work for? (Other, continued)

Printer & Marketing Services

Professional Association

Promotional products agency

Publishing Consultancy

Radio Broadcast Supplier of On-Air Products

Real Estate Association

Real estate developer

Retailer

SCORE counselor, SBA, a US government agency

Self employed consultant

Shopping center marketing and management

Software – (3 mentions)

Staffing and Human Resource Consulting & Management

Subscription based satellite entertainment provider

Supply Chain Mgmt

Syndicator

Technology Consulting

Tourism board

Trade Association – (2 mentions)

Transportation – (2 mentions)

Transportation, Logistics and Financial Services

Travel Industry

TV Network

United States Postal Service – (4 mentions)

University

No answer (3)

Means and medians were calculated according to standard statistical practices.

Means or “average” figures presented in the tables refer to the statistical mean. The mean is defined as “the value obtained by adding all the numeric answers given for a particular question and then dividing by the total number of respondents answering the question.” The mathematical formula for calculating the mean is:

$$\bar{x} = \frac{\sum x}{n}$$

\bar{x} = the mean (average)
 x = each of the individual observations
 \sum = the operation of summing x
 n = the number of observations

Estimated Means have been calculated for range responses. To obtain these estimated means, the midpoint for each range was used in place of x in the above formula.

Medians are defined as “the value that is exactly in the middle of all answers,” or the point where half of the responses lie above and half of the responses lie below the value.

Estimated Medians have been calculated for range responses.

To obtain estimated medians:

1. Determine where the midpoint of all responses fall by dividing the total number of responses by two.
2. Take the calculated midpoint and subtract the number of respondents for each range—starting with the first range until subtracting the next range produces a negative number. The “remaining” positive answers are used in step 3 as the “remainder.”
3. Calculate the estimated mean by the following mathematical formula:

$$X = \frac{(l \times R)}{n} + r$$

X = the estimated median
 l = the remainder
 R = range span
 n = the number of responses in the range
 r = the lower end of the range

Appendix C – Survey Instruments

Dear DIRECT Reader:

I know your time is valuable, so let me get right to the point.

In the September issue of DIRECT, I'm planning on giving you the results of our List Industry survey. But to provide this information, I need your help.

Since the number of industry professionals being contacted is small, your assistance is vital to achieve meaningful results. Please be assured that we treat any information you provide as STRICTLY CONFIDENTIAL, used only in combination with answers from other readers.

The survey should take only 5 minutes to complete. Before you click on the link below, please turn off any pop up blocking software you may be using. To begin the survey, please click on the following URL address, or copy and paste the address into your Internet browser:

<http://research2004.primediabusiness.com/sw/wchost.asp?st=drt04lis>

Thank you in advance for your help and your continued interest in DIRECT Magazine.

Sincerely,

Ray Schultz
Editorial Director

ENTER FOR A CHANCE TO WIN A \$50 AMAZON.COM GIFT CERTIFICATE

P.S. After completing your survey, you may enter a drawing for one of four \$50 Amazon.com gift certificates. Because we're surveying only a small sample of attendees, your odds of winning are excellent!

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(!optlink!)

Primedia Business, 9800 Metcalf Ave., Overland Park, KS 66212

Dear DIRECT Reader:

A few days ago I e-mailed you asking for your help in finding out about the List Industry for a report to be published in the September issue of DIRECT Magazine. **IF YOU HAVE ALREADY COMPLETED AND THE SURVEY, PLEASE ACCEPT MY PERSONAL THANKS AND DISREGARD THIS.** However, if you have not yet had an opportunity to answer the survey, I am still very interested in receiving your input.

Because the number of readers being contacted is small, your reply is vital for representative results. Of course, your answers will be kept **STRICTLY CONFIDENTIAL**.

The survey should take only 5 minutes to complete. Before you click on the link below, please turn off any pop up blocking software you may be using. To begin the survey, please click on the following URL address, or copy and paste the address into your Internet browser:

<http://research2004.primediabusiness.com/sw/wchost.asp?st=drt04lis>

Thank you in advance for your help and your continued interest in DIRECT Magazine.

Sincerely,

Ray Schultz
Editorial Director

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Question PG1

Direct 2004 List Industry Study

Thank you for participating in the Direct 2004 List Industry survey. Your opinions are important to us! Please be assured any information you provide is strictly confidential. Watch for survey results in the September issue of Direct.

A. Which best describes your situation?

- I work for a direct marketing list vendor
- I work for a company that markets products and/or services using direct marketing
- Other (specify)

Next

Logic Instructions (flow only):

if (ans = 2) skip Pg13

if (ans = 3) skip Pg19

Question PG2

List Vendors Questions

1. Compared to 2003, how has your list rental revenue changed in 2004?

- Increased
- Decreased
- Stayed the same
- Unsure

2. Again, compared to 2003, how has your list rental revenue changed in 2004 for each of the following types of lists?

	Increased	Decreased	Stayed the Same	Do Not Rent	Unsure
Traditional Mail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E-mail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Logic Instructions (flow only):

Question PG3

3a. Which of these services do you offer to your customers? (*mark all that apply*)

- Modeling
- Analytics
- Campaign Management
- None of the above

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Logic Instructions (flow only):
if (ans = 4) skip Pg5

Question PG4

3b. For each service that you offer, please indicate how client usage has changed in 2004 as compared to 2003.

	Increased	Decreased	Stayed the Same	Do Not Offer	Unsure
Modeling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analytics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Campaign Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Logic Instructions (flow only):

Question PG5

4. As compared to 2003, how has the percent of revenue that selects and other running charges generate changed in 2004?

- Increased
- Decreased
- Stayed the same
- Unsure

5. As compared to 2003, how has the total volume of names rented changed in 2004?

- Increased
- Decreased
- Stayed the same
- Unsure

6. What changes have you witnessed in your clients' use of response lists versus compiled files in 2004 as compared to 2003?

- Both have increased.
- Response lists have increased, compiled have decreased.
- Compiled have increased, response lists have decreased.
- Both have been flat.
- Both have decreased.

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Logic Instructions (flow only):

Question PG6

7. How has the percentage of list tests versus continuations changed in 2004 as compared to 2003?

- More test lists are being used
- More continuations are being used
- The percentage of each has remained constant

8. As compared to 2003, how has the volume of new lists coming on to the market changed in 2004?

- Volume of new lists is higher
- Volume of new lists is lower
- Volume of new lists remains the same

9. Again as compared to 2003, how has the volume of lists being taken off the market changed in 2004?

- Volume of lists taken off market is higher
- Volume of lists taken off market is lower
- Volume of lists taken off market remains the same

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Logic Instructions (flow only):

Question PG7

10. How has your clients' use of insert media changed in 2004 as compared to 2003?

- Use of insert media has increased
- Use of insert media has decreased
- Use of insert media has remained the same
- Don't offer insert media

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Logic Instructions (flow only):
if (ans > 1) skp Pg9

Question PG8

11. If your clients are using more insert media, is the additional spending coming from traditional list rental budgets?

- Yes, it is coming from list rental budgets
- No, it is not coming from list rental budgets

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Logic Instructions (flow only):

Question PG9

12. How has the volume of names your clients are ordering for the holiday 2004 season changed, compared with the holiday 2003 season.

- Increased
- Decreased
- Stayed the same
- Too soon to tell
- Unsure

13. For each of the following industries you serve, please indicate whether list revenue has increased, decreased, stayed the same. If you do not have clients within the industry, please check "do not serve."

	Increased	Decreased	Stayed the Same	Do Not Serve	Unsure
Automotive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B-to-B Products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B-to-B Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial/Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health Care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pharmaceutical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Publishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retail Catalog	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telecommunications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utilities (Non-telecom)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If Other, please specify: _____

Question PG10

14. From which of the following do you generate list orders? *(Please check all that apply)*

- Directly from the mailer
- Ad Agency
- List Broker
- Other (specify)

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Logic Instructions (flow only):

Question PG11

15a. Have you observed any new sectors or industries that have begun purchasing lists in 2004?

- No
- Yes

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Logic Instructions (flow only):

if (ans = 1) skip Pg19

Question PG12

15b. If yes, please specify sectors or industries:

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Logic Instructions (flow only):
skp Pg19

Question PG13

Marketers Questions:

16. Compared to 2003, how has your list rental use changed in 2004 for each of the following types of lists?

	Increased	Decreased	Stayed the Same	Do Not Use	Unsure
Traditional Mail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E-mail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Logic Instructions (flow only):

Question PG14

17a. Which of these services does your company use?

- Modeling
- Analytics
- Campaign Management
- None of the above

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Logic Instructions (flow only):

if (ans = 1) skip Pg15

if (ans = 2) skip Pg15

if (ans = 3) skip Pg15

if (ans = 4) skip Pg16

if (ans < 1) skip Pg16

Question PG15

17b. For each service that you use, please indicate how your usage has changed in 2004 as compared to 2003?

	Increased	Decreased	Stayed the Same	Do Not Use	Unsure
Modeling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analytics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Campaign Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Logic Instructions (flow only):

Question PG16

18. As compared to 2003, how has the total volume of names you've rented changed in 2004?

- Increased
- Decreased
- Stayed the same
- Unsure

19. How has your use of compiled files versus response lists in 2004 as compared to 2003?

- Both have increased.
- Response lists have increased, compiled have decreased.
- Compiled have increased, response lists have decreased.
- Both have been flat.
- Both have decreased.

20. As compared to 2003, how has the percent of your list expenses generated by selects and other running charges changed in 2004?

- Percentage has increased
- Percentage has decreased
- Percentage has remained the same

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Logic Instructions (flow only):

Question PG17

21. How has the percentage of list tests versus continuations you use changed in 2004 as compared to 2003?

- I am using more test lists
- I am using more continuations
- The percentage of each has remained constant

22. How has the percentage of house lists versus rented files changed in 2004 as compared to 2003?

- I am using more house lists
- I am using more rented files
- The percentage of each has remained the same

23. Have you changed list managers in 2004?

- Yes, for some files
- Yes, for all files
- No, have not changed

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Logic Instructions (flow only):

Question PG18

24. How has your use of insert media changed in 2004 as compared to 2003?

- Use of insert media has increased
- Use of insert media has decreased
- Use of insert media has remained the same
- Don't use insert media

25. How has the volume of names you are ordering for the holiday 2004 season changed, compared with the holiday 2003 season?

- Increased
- Decreased
- Stayed the same
- Too soon to tell
- Unsure

26. How have your response rates changed in 2004 as compared to 2003?

- Increased
- Decreased
- Stayed the same
- Unsure

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Logic Instructions (flow only):

Question PG19

27. What type of company do you work for?

- Cataloger
- Compiler
- Communications
- Data processor
- Financial services
- Fulfillment
- Fundraiser (nonprofit)
- Healthcare
- Insurance
- List broker
- List manager
- Manufacturer
- Printer
- Publisher
- Retailer
- Seminars/conferences/trade shows
- Telemarketer
- Wholesaler/Distributor
- Other (specify)

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Logic Instructions (flow only):

Question PG20

28 What percentage of your lists used/sold are:

- Consumers
- Businesses
- Combination B2B and B2C

29. What was your company's approximate total revenue in 2003?

- Under \$250,000
- \$250,000 to \$999,999
- \$1.0 to \$2.49 million
- \$2.5 to \$4.9 million
- \$5.0 to \$9.9 million
- \$10.0 to \$24.9 million
- \$25.0 to \$49.9 million
- \$50.0 to \$99.9 million
- \$100.0 to \$499.9 million
- \$500.0 to \$999.9 million
- \$1.0 billion or more

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Logic Instructions (flow only):

Question END

Thank you for your valuable time and input!

To enter into a drawing for one of four \$50 Amazon.com gift certificates, please fill in your name and e-mail address. Only surveys that contain both names and e-mail addresses are eligible for the gift certificates. *Again, all answers will remain completely anonymous.*

Name (first and last):

Email:

Sweepstakes Rules and Regulations:

1. No purchase necessary. Open to adults 18 and older who are residents of the continental United States.
2. Enter by completing the official entry form (name and e-mail address) located on the survey form. No mechanical reproductions permitted.
3. Awards -- four individual prizes: four (4) \$50 Amazon.com Gift Certificates (a \$50 value for each prize). The winners will be determined by a random drawing of all entries received by August 20, 2004. The winners will be notified by e-mail on or about August 31, 2004. Award notification returned as undeliverable as addressed will result in an alternate winner being drawn and notified until a qualified entrant accepts the award. The winner of the drawing will receive the above listed prize.
4. No substitution offered. Award is not transferable.
5. If applicable, all federal, state and/or local taxes, if any, are the sole responsibility of the winners.
6. Odds of winning will be determined by the number of entries received.
7. By participating, entrants agree to these rules and the decisions of the judges, which shall be final in all matters related to this drawing. All federal, state and local laws and regulations apply. Void where prohibited by law.
8. To obtain names of the winners of these prizes, send an e-mail to tgrant@primediabusiness.com, SUBJECT: Direct 2004 List Industry Survey winners.

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Logic Instructions (flow only):