

## 3.1 DIRECT MARKETING TRENDS

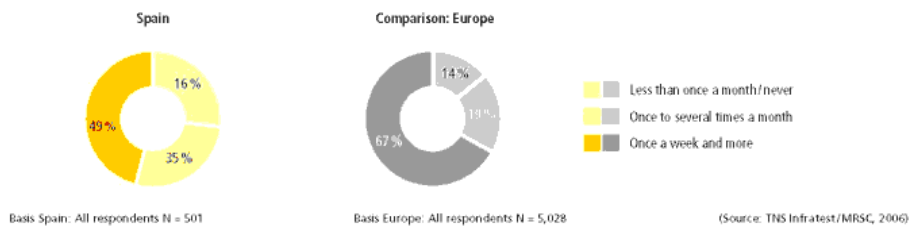
The consumers surveyed can be classified into three categories on the basis of their response to mailings:

Those with an affinity for mailings read them at least occasionally, regular readers far more frequently, and the responsive readers reacted at least once in 12 months to

their mailings. A pleasing aspect is that almost every second Spanish mailing recipient regularly reads his or her mailings.

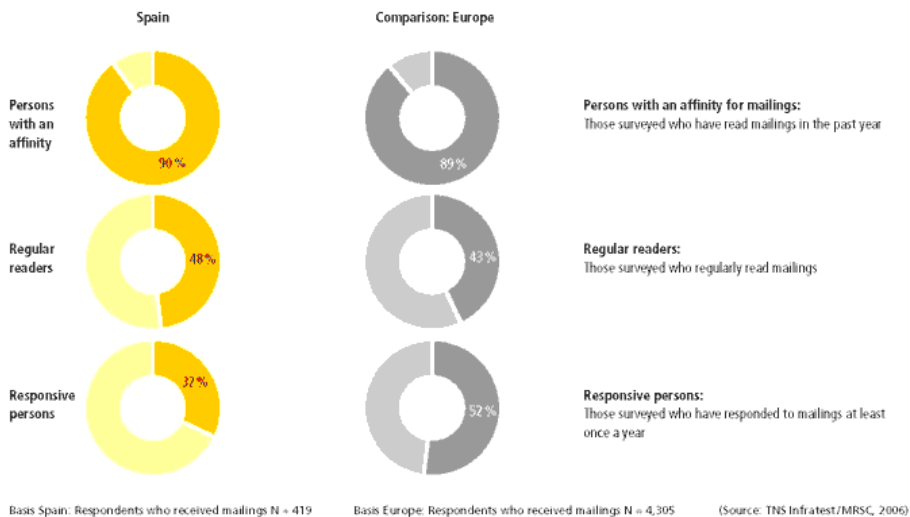
### Receipt of mailings

Almost half of all those surveyed (49 %) receive mailings at least once a week – and only 16 % rarely or never. The proportion of recipients in Europe is 67 %.



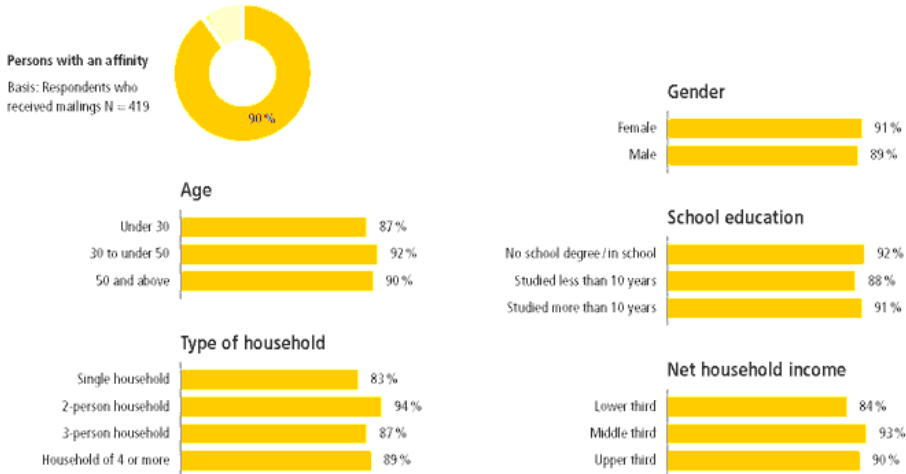
### Response to mailings

90 % of consumers surveyed have an affinity for mailings. Almost half (48 %) read them regularly and 32 % respond actively to them. That means the response behavior of Spanish consumers has to be encouraged even more strongly.



## Profile of persons with an affinity for mailings

90 % of Spanish mailing recipients read them last year and are thus classified as having an affinity for them. An above-average number of consumers among those aged 30 to 50 (92 %) and 2-person households (94 %) have an affinity for them.

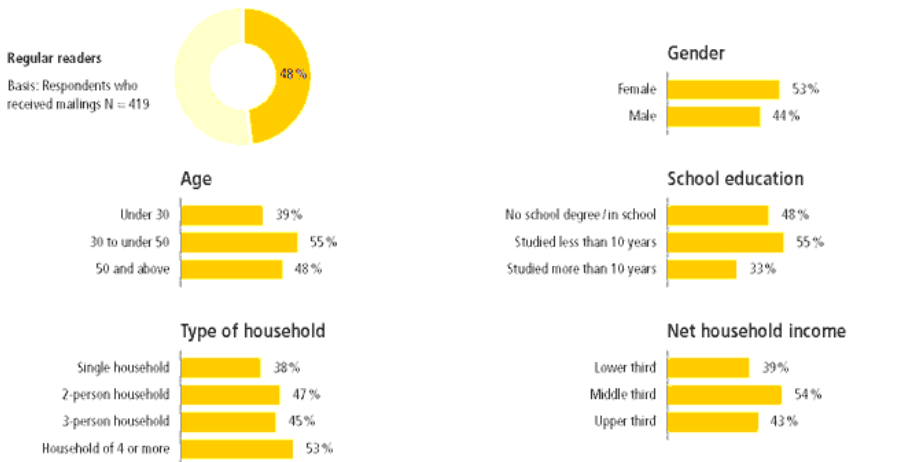


Basis: Respondents from the target group who received mailings

(Source: TNS Infratest / MRSC, 2006)

## Profile of regular readers

Almost half (48 %) of all Spaniards read mailings regularly. 53 % of female consumers consider themselves regular readers – compared with 44 % of men. In addition, an above-average number of persons aged 30 to 50 and those with a medium length of education belong to this group (55 % each).

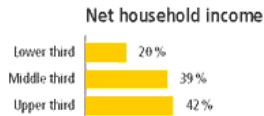
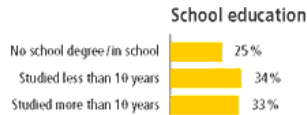
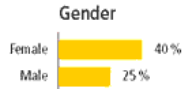
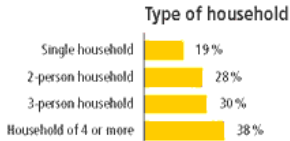
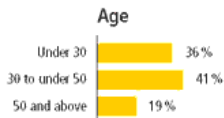
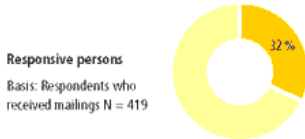


Basis: Respondents from the target group who received mailings

(Source: TNS Infratest / MRSC, 2006)

## Profile of responsive persons

Almost every third Spanish mailing recipient (32 %) says he or she responds at least once a year to them. An above-average number of responsive persons can be found in the young and middle age groups (36 % and 41 % respectively), as well as among female consumers (40 %) and highest earners (42 %).

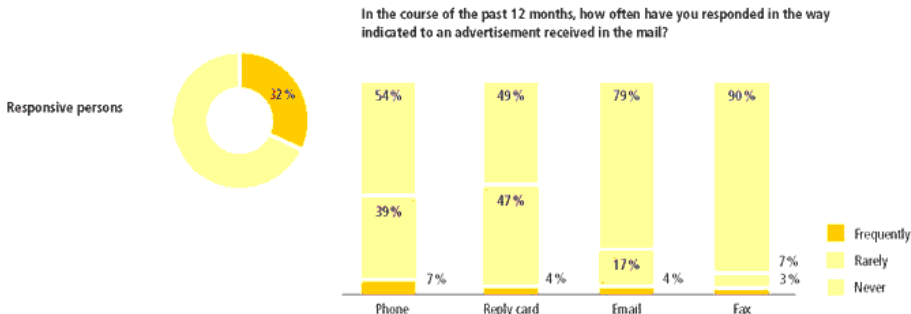


Basis: Respondents from the target group who received mailings

(Source: TNS Infratest / MRSC, 2006)

## Response channels

Of the 32 % of responsive persons, 51 % respond by reply card (frequently and rarely), the channel that leads the popularity ratings. The phone follows in second (46 %) and email ranks with just 21 % in the third ahead of the fax (10 %).



Basis: Respondents who received mailings N = 419

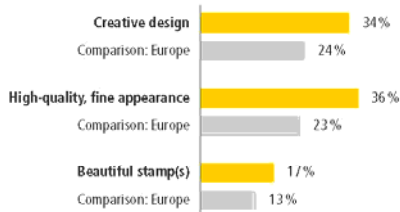
Basis: Persons who have responded to mailings N = 135

(Source: TNS Infratest / MRSC, 2006)

## Relevance of design, address and content

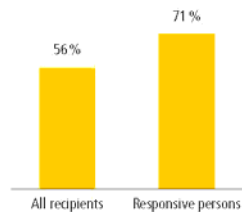
Anyone wishing to persuade Spanish consumers to respond to their mailings should set great store by overall design – the priority for 71 % of responsive persons. A second focal aspect is the form of address: the right tone strikes a chord among 60 % of all recipients and 64 % of responsive persons. A total of 47 % trust a well-known company – compared with a figure of just 35 % among their European neighbors.

### Respondents who rate the design of the mailing as very important

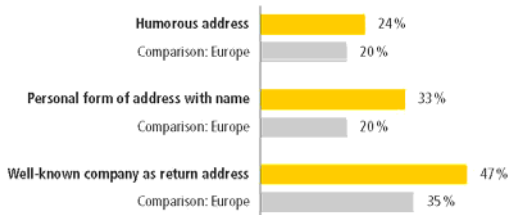


### Overall relevance of design

Design is very important

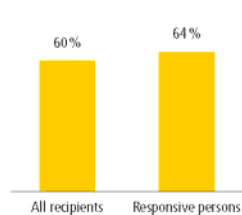


### Respondents who rate the address as very important

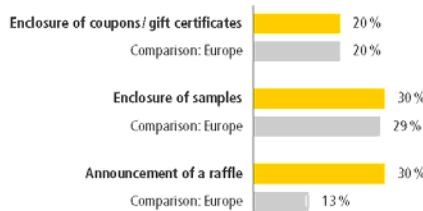


### Overall relevance of address

Address is very important

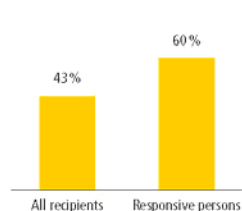


### Respondents who rate the content of the mailing as very important



### Overall relevance of content

Content is very important



## Relevance of design, address and content for those with an affinity for mailings

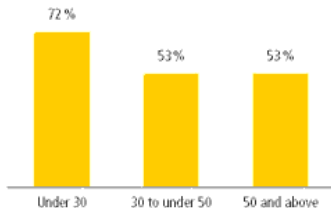
A well-known company plays an important role for persons with an affinity for mailings – the figure is 45 % among men and as high as 52 % among women. 70 % of the under-30s attach weight to the right address and 72 % of this group set store by the creative features of a mailing. Samples (39 %) and raffles (41 %) are liked mainly by female respondents.

### Persons with an affinity who rate the design of the mailing as very important



### Overall relevance of design

Design is very important

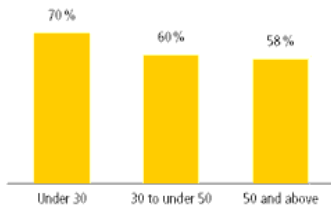


### Persons with an affinity who rate the mailing's address as very important



### Overall relevance of address

Address is very important

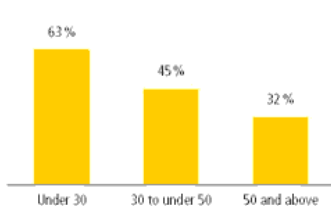


### Persons with an affinity who rate the content of the mailing as very important



### Overall relevance of content

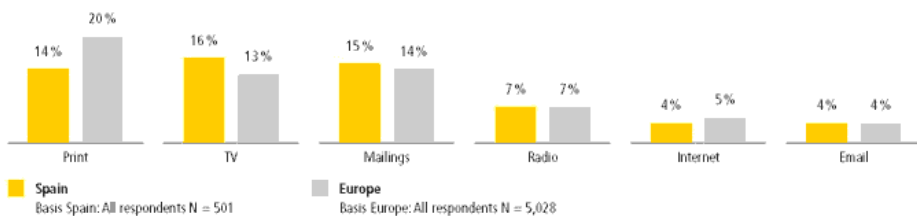
Content is very important



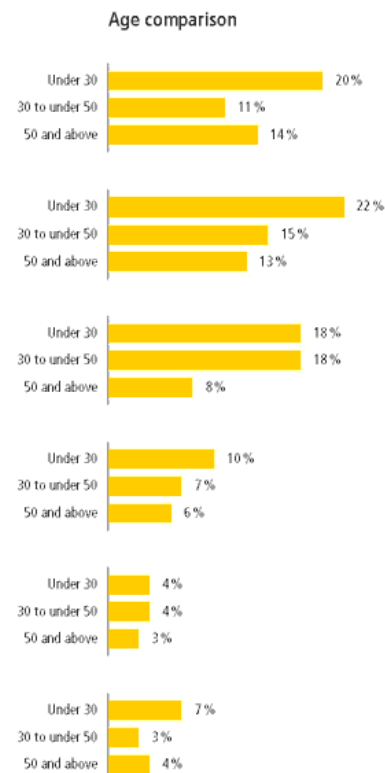
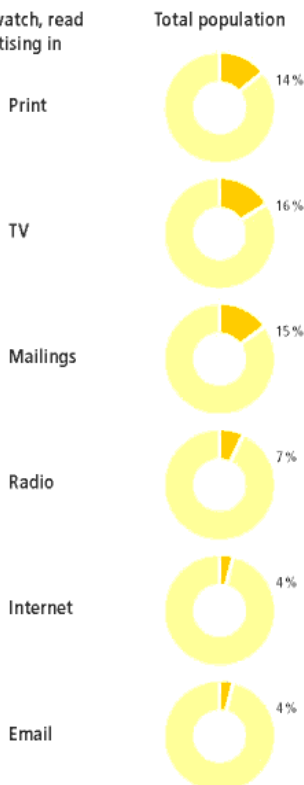
## Advertising media affinity

Mailing (15%) takes second place in terms of overall popularity – almost level with TV advertising (16%). They even meet with above-average approval and are preferred to all other media among those aged 30 to 50 (18%). Emails and internet advertising find very little appeal in any age group.

### Overall popularity: I like to watch, read or hear advertising in



Yes, I like to watch, read or hear advertising in



Basis Spain: All respondents N = 501

(Source: TNS Infratest/MRSC, 2006)

## 3.2 CONSUMER TRENDS

### Interest in sectors (1)

Spain is not just an extremely popular vacation destination for foreign tourists. Spanish consumers also have a weakness for travel. 36% of all those surveyed and 43% of responsive persons are "ready for a vacation". In Europe, only an average of every third person is interested in this topic.



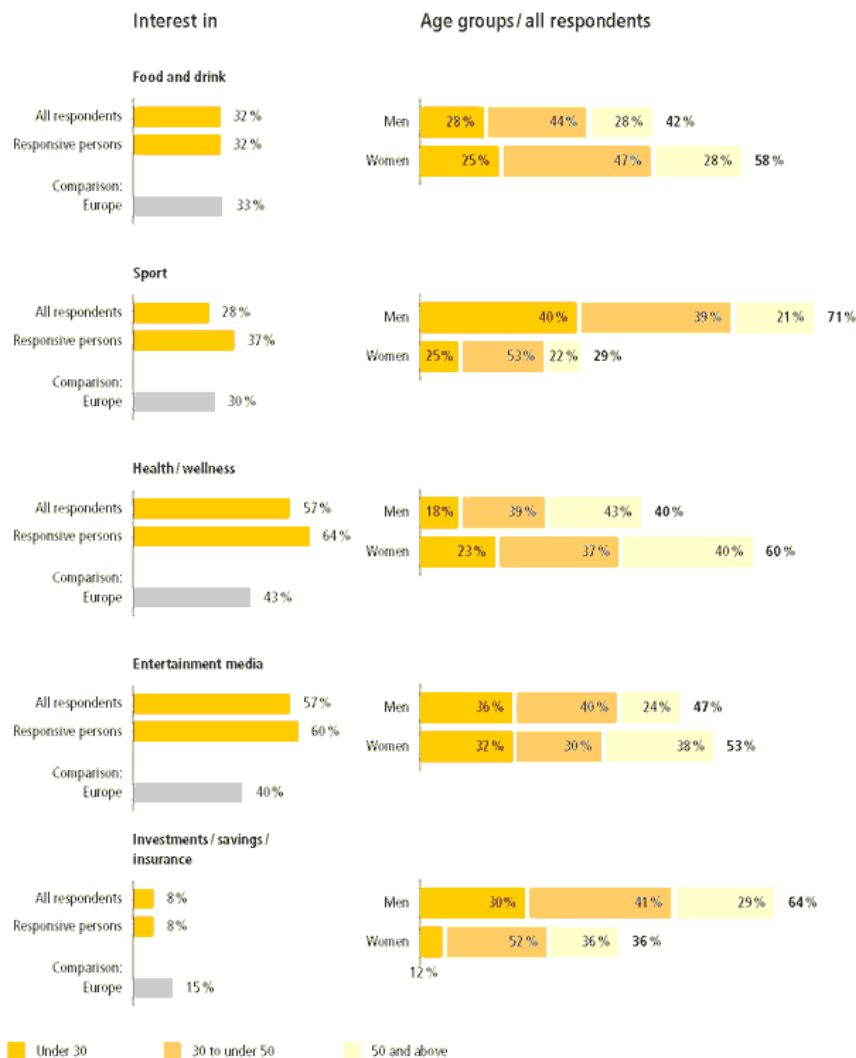
Basis Spain: All respondents N = 501

Basis Europe: All respondents N = 5,028

(Source: TNS Infratest/MRSC, 2006)

## Interest in sectors (2)

Health and wellness products are equally popular among all those surveyed (57 %) and responsive persons (64 %). It is also no surprise that the proportion of women here is higher than that of men (60 % versus 40 %). Of particular emphasis is the great interest among those aged over 50 (43 % of interested men, 40 % of interested women).



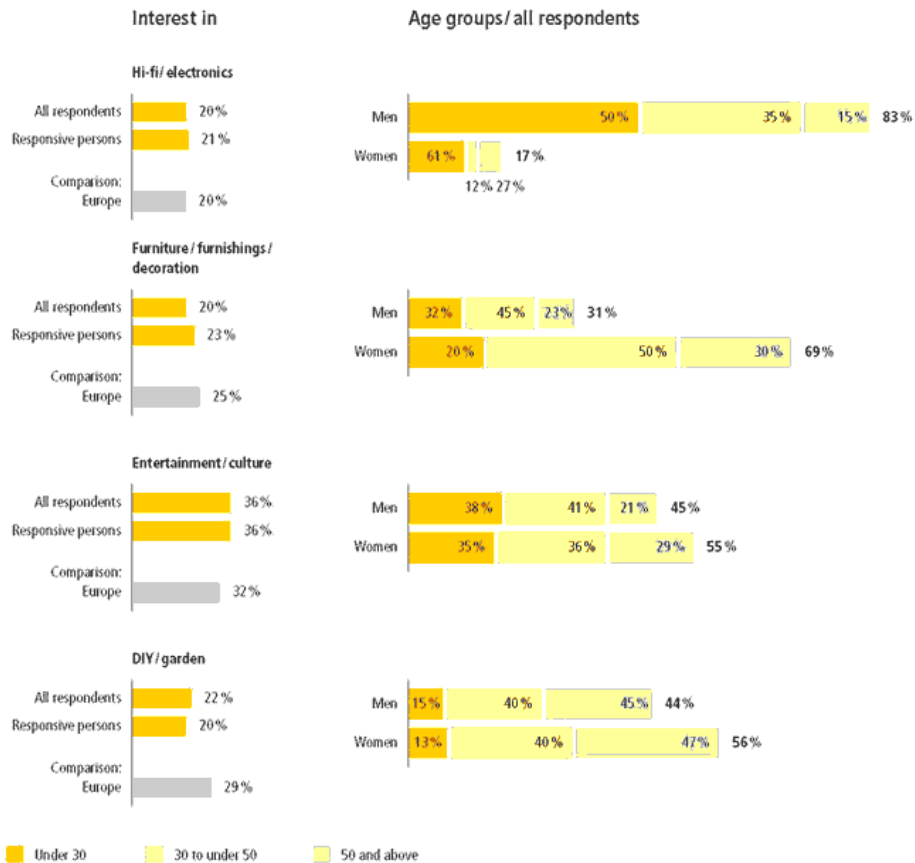
Basis Spain: All respondents N = 501

Basis Europe: All respondents N = 5,028

(Source: INS Infratest / MRSC, 2006)

### Interest in sectors (3)

The group of consumers interested in hi-fi and electronics is dominated by young men, with women only accounting for a share of 17% in this target group. The ratios here are not as evenly balanced as in the fields of entertainment/culture or DIY/gardening, for example.



Basis Spain: All respondents N = 501

Basis Europe: All respondents N = 5,028

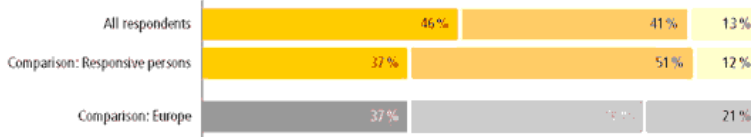
(Source: TNS Infratest / MRSC, 2006)

## General attitude towards consumption

Spanish consumers are loyal to brands (75%). The share among responsive persons is even 79%. However, quality sways consumption behavior (68%). Price is of lesser importance, above all for responsive persons (37%). Every second Spaniard is open to new products.

### Price orientation

When shopping, I usually choose the cheapest provider



### Quality orientation

I don't mind spending more for particularly good quality



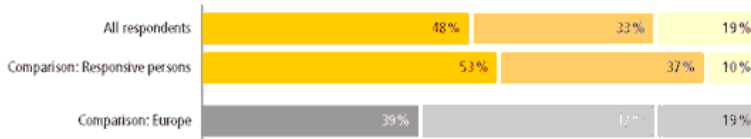
### Brand loyalty

If I'm satisfied with a brand, I stick with it



### Openness

I like trying out new products



■ Applies to me   
 ■ Indifferent   
 ■ Does not apply to me

Basis Spain: All respondents N = 501

Basis Europe: All respondents N = 5,028

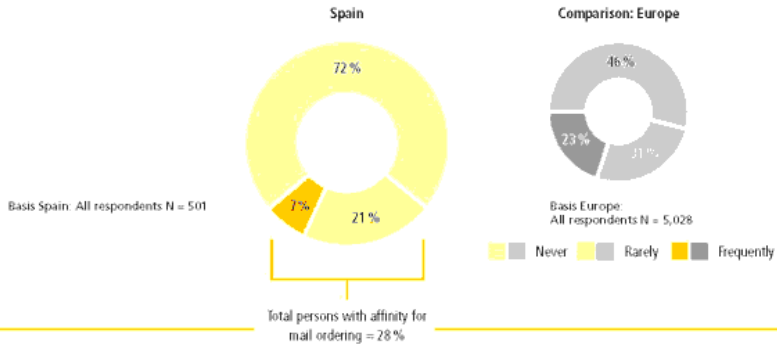
(Source: TNS Infratest/MRSC, 2006)

### 3.3 MAIL ORDER TRENDS

#### Profile of persons with an affinity for mail ordering

Mail order can still be developed in Spain – only 28% of all those surveyed say they have shopped this way to date, compared with an average of 54% in Europe. Persons with an affinity for mail ordering can be found in particular among those with a better education (35%) and with an average (41%) and above-average income (40%).

How often have you shopped by mail order in the past year?



#### Age



#### Type of household



#### Gender



#### Net household income



#### School education



Basis Spain: Respondents who have shopped by mail order

(Source: TNS Infratest /MRSC, 2006)