

# Mailers

**W**hat a difference a year makes. With the U.S. Postal Service reporting mail volume on the decline to the tune of billions of pieces, it comes as no surprise that the 2009 Top 50 Mailers list is greatly changed from its 2008 counterpart.

One-third of the companies on last year's list were knocked out by the recession's effect on their marketing budgets—and they primarily were replaced by companies that are new to the Top 50. Especially hard-hit was the financial sector, which has dominated the direct mail field with respect to estimated volume for three years straight. But not this time around, as Capital One and Bank of America are the lone banking reps on the file for 2009.

Looking at the list broken down by sector, nonprofits widened their lead even more during the past year. They now account for 44 percent of the file, about a 15 percent increase. At 36 percent, publishers have maintained their perennially strong showing, especially now that they have taken over the top two deciles of the file from a volume perspective. Finally, merchandise marketers muscled in a little further to command 6 percent of the list.

Interestingly, Sprint/Nextel fought its way back into the Top 50, after being absent in 2008, due to its huge, multichannel branding campaign. And DirecTV likely made it into the ranks because of the extra communications it mailed to capitalize on the recent government-mandated switch from analog to digital television service.

The economy might be the main driver of the recent activity in the Top 50 list, but there's no doubt the ongoing shift of marketing dollars from print to digital campaigns has influenced which firms made the list and how high up. With their robust postal databases, publishers and nonprofits continue to get good performance from direct mail while they build their online acquisition strategies. "What we're seeing is that while file sizes are overall diminishing, those companies who are multichannel and keeping direct mail active tend to not be seeing the same file size attrition and also the performance of their files is holding up much, much better," notes Fran Green, chief revenue strategist for American List Counsel, the list and data services firm that helps *Target Marketing* develop this annual analysis.

It's anyone's guess as to what next year's Top 50 list will look like. Many agree that it's not likely direct mail volumes will rebound to their pre-economy levels when the recession lifts, but that should only create some great opportunities for marketers who know how to succeed in this channel.

By Hallie Mummert &  
Melissa Ward

The fourth  
annual listing  
of top mailers  
as measured  
by volume

## 2009's Top 50 Mailers (excludes catalogers)

Company	Sales/Revenue (in millions)	Industry	List Manager
Bank of America	\$72,782	Financial Services	Does not rent
✓ The Home Depot	\$71,288	Merchandise	Does not rent
✓ Sprint/Nextel	\$35,635	Telecom	Does not rent
✓ DirecTV	\$19,693	Entertainment	Does not rent
Capital One	\$13,892	Financial Services	Does not rent
Dow Jones & Co.	\$ 7,372	Media	American List Counsel
Time Inc.	\$ 4,608	Media	Direct Media/Millard; RMI Direct Marketing
✓ Mutual of Omaha	\$ 4,241.7*	Insurance	Does not rent
The Salvation Army	\$ 4,157*	Nonprofit	Does not rent
✓ American Red Cross	\$ 3,155.3	Nonprofit	American List Counsel; Names in the News
The New York Times Co.	\$ 2,948.9	Media	American List Counsel
Reader's Digest Association	\$ 2,786.4	Media	American List Counsel
Bose Corp.	\$ 2,180	Merchandise	Does not rent
Memorial Sloan-Kettering Cancer Society	\$ 1,623*	Nonprofit	Direct Media/Millard
Meredith Corp.	\$ 1,586.5	Media	American List Counsel; Direct Media/Millard
AARP	\$ 1,173.9	Nonprofit	Does not rent
American Cancer Society	\$ 1,129.2	Nonprofit	Paradysz Matera
The Nature Conservancy	\$ 1,017.1*	Nonprofit	American List Counsel
ALASC/St. Jude Hospital	\$ 723.8**	Nonprofit	Does not rent
National Geographic Society	\$ 650	Media/Nonprofit	Direct Media/Millard
American Heart Association	\$ 645	Nonprofit	Direct Media/Millard
✓ Public Broadcasting Service	\$ 624.1	Nonprofit	Does not rent

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### U.S. Fund for UNICEF

Every Halloween, as ghouls and witches make the rounds to fill sacks full of candy, there are some costumed children who carry something else to fill: the Trick-or-Treat UNICEF donation boxes. However, this isn't the only way the U.S. Fund for UNICEF fundraises in order to save and protect the lives of children across the globe—the nonprofit also has a dedicated direct mail program.

More than 20 million pieces of direct mail are mailed every year, says Helene Vallone, vice president of direct and interactive marketing for the U.S. Fund for UNICEF. And due to the nonprofit's program, 29 percent of its donations come through the direct mail channel.

Though spending on direct mail has become a challenge, due to increased postage rates, Vallone asserts that a focus on the program's ROI and the evolution of the nonprofit's direct mail strategy have been beneficial. "The strategy over time has changed from mass marketing to becoming increasingly targeted toward acquiring a more committed, longer-term value donor to our mission. We have increased

unicef united states fund

This 41c packet of "miracle paste" can bring a child back from the brink of death.

unicef united states fund

the use of personalization tactics and strategies that deepen the relationship with the donor."

Ultimately, the U.S. Fund for UNICEF's direct mail success is due to innovative thinking and strategy, especially when faced with a tough economy. According to Vallone, the nonprofit has integrated the direct mail program with its other channels, to the benefit of both donors and UNICEF. "In all our direct mail, we cross-promote a variety of support opportunities, allowing the donors to interact with our organization in the method that they prefer. Our data shows that donors who are interacting with us via multiple channels and programs are retaining at a higher rate."

—Melissa Ward

Company	Sales/Revenue (in millions)	Industry	List Manager
✓ Publishers Clearing House	\$620	Business Services	List Services Corp.
✓ Smithsonian Institution	\$532.3	Media/Nonprofit	American List Counsel; Lake Group Media
The Economist Group	\$516.4	Media	Lake Group Media
✓ U.S. Fund for UNICEF	\$453.9	Nonprofit	Names in the News
Conde Nast	\$453.5*	Media	Direct Media/Millard
Direct Brands	\$401.9#	Media	Specialists Marketing Services
Habitat for Humanity	\$355.6	Nonprofit	American List Counsel
The Leukemia & Lymphoma Society	\$269.1	Nonprofit	List Services Corp.
Consumers Union	\$248.8	Media/Nonprofit	RMI Direct Marketing
March of Dimes	\$247.7	Nonprofit	American List Counsel
Omaha Steaks	\$199.7	Foods	Direct Media/Millard
✓ World Wildlife Fund	\$179.8	Nonprofit	True North List Marketing
✓ Rodale	\$135.6	Media	American List Counsel
Hachette Filipacchi Media	\$123.1	Media	RMI Direct Marketing
Paralyzed Veterans of America	\$108.5	Nonprofit	Lake Group Media
✓ Humane Society of the U.S.	\$101.8	Nonprofit	List America
✓ Alzheimers Association	\$ 95.2	Nonprofit	Direct Media/Millard
National Wildlife Federation	\$ 82.9	Nonprofit	RMI Direct Marketing
Special Olympics	\$ 81.6	Nonprofit	American List Counsel
International Masters Publishers	\$ 7	Continuity	Specialists Marketing Services
AAA	NA	Nonprofit	Does not rent
Boardroom	NA	Media	Boardroom/Bottom Line Lists
Hearst Magazines	NA	Media	American List Counsel
Highlights for Children	NA	Media	American List Counsel
✓ North American Membership Group	NA	Media	Chilcutt Direct Marketing
✓ Republican National Committee	NA	Nonprofit	Does not rent
The Smile Train	NA	Nonprofit	Names in the News
✓ Suarez Corp.	NA	Merchandise	Country Marketing
✓ New to list in 2009; *2007 sales/revenue; **2006 sales/revenue; #Estimated sales/revenue Sales/revenue data sources: Hoover's, Charity Navigator, companies' own data			

## Paralyzed Veterans of America

In 1946, the Paralyzed Veterans of America (PVA) was founded to help improve the quality of life for members of the veterans service organization, as well as all people who have experienced spinal cord injury or dysfunction (SCI/D). With a mission to be a leading advocate for health care, SCI/D research and education, and veterans' benefits and rights, the nonprofit relies on the 18 million donors within its database, especially its 3.6 million active donors.

The direct mail program raises approximately 88 percent of the nonprofit's donations, explains Paralyzed Veterans of America's Director of Direct Marketing Cathy Jenkins. "We mail approximately 100 million pieces of mail annually," she states. "This includes renewal and acquisition."

Jenkins feels, in spite of the increase in postage and product costs, spending on direct mail isn't any harder than on other

media. PVA sees the value of integrating its direct mail campaigns with online and e-mail marketing, allowing donors to self-select the channels they wish to interact with. "We are always in search of new avenues of raising funds for the organization," says Jenkins. "And we are fortunate to have leadership that allows us to venture into new media."

—M.W.

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