



## **ABEMD**

# **BRAZILIAN DIRECT MARKETING ASSOCIATION (ASSOCIAÇÃO BRASILEIRA DE MARKETING DIRETO)**

## **INDICATORS 2009 and FIRST SEMESTER 2010**



**SIMONSEN  
ASSOCIADOS**

# **OUR THANKS TO CORREIOS FOR SUPPORTING THIS STUDY**





**SIMONSEN  
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## **TECHNICAL ASSISTANCE**





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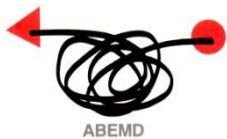
Objective



# **OBJECTIVE**

**The objective of this study is to develop a current and updated basis of strategic information on the direct marketing sector, encompassing its main segments.**

**The direct marketing study comprises the estimate of market size, equivalent to the revenue of services provided by its several segments.**



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Methodology



# METHODOLOGY

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**The information presented in this study resulted from analytical treatment of data and information obtained from primary and secondary sources:**

- **Primary sources, represented by interviews carried out with direct marketing service companies, through their various segments, client companies, government agencies and trade associations, seeking to develop, based on these information, knowledge about the market of the direct marketing sector.**
- **Secondary sources are represented by elements extracted from publications and reports of specific researches, found in several data sources and in the Data Bank of SIMONSEN ASSOCIADOS.**





# CONSULTED COMPANIES

## UPDATE: STUDY ON 2009 AND 2010

- Direct Marketing Companies
- Client/Customer Companies
- Associations and Entities
- **214 Total of Interviews**



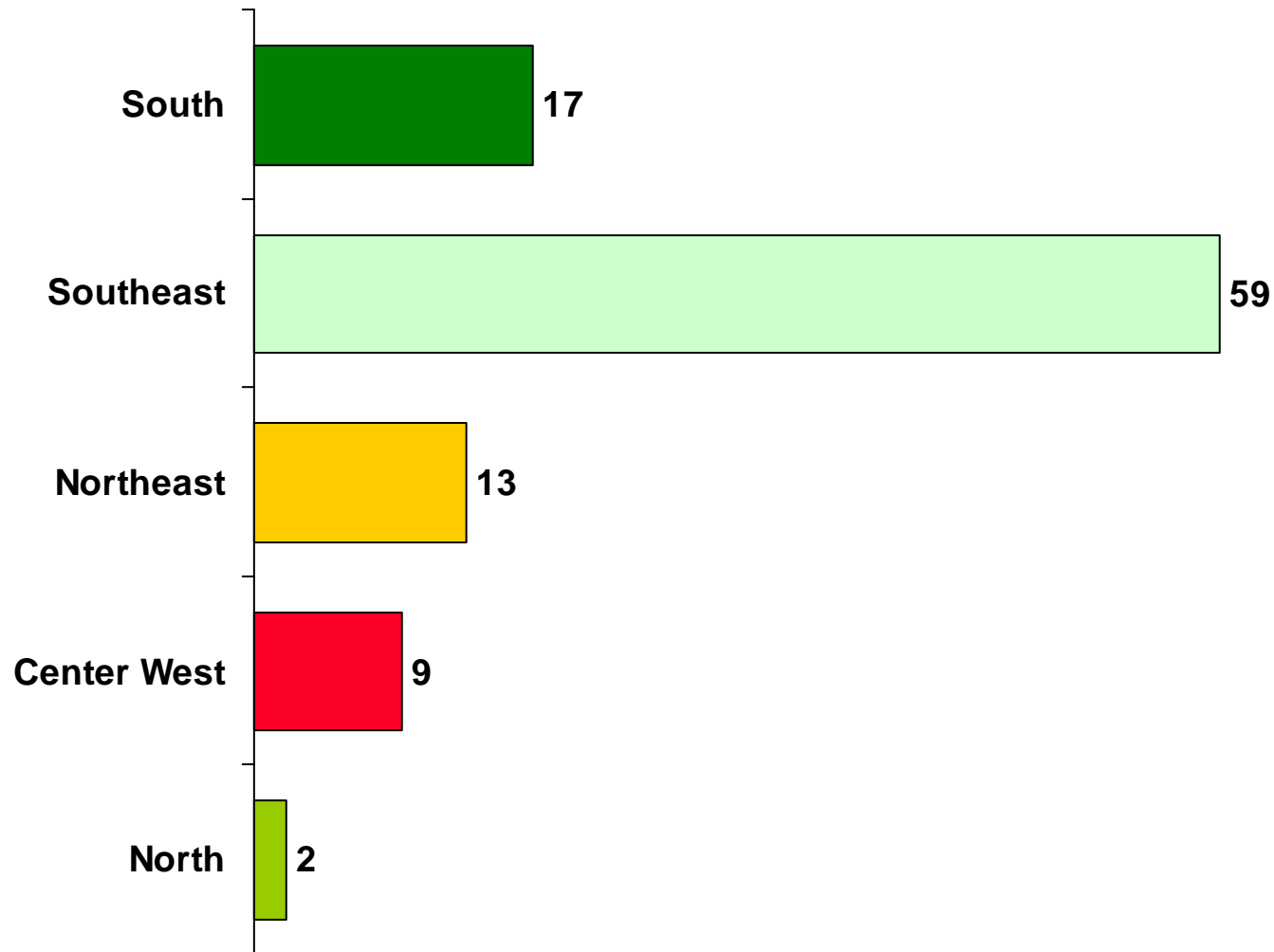
# CONSULTED COMPANIES: NUMBER OF INTERVIEWS

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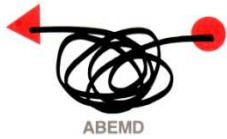
- 2009 STUDY = 214
- 2008 STUDY = 102
- 2007 STUDY = 125
- 2006 STUDY = 183



**LOCATION OF CONSULTED COMPANIES  
2009  
% BY GEOGRAPHIC REGION**

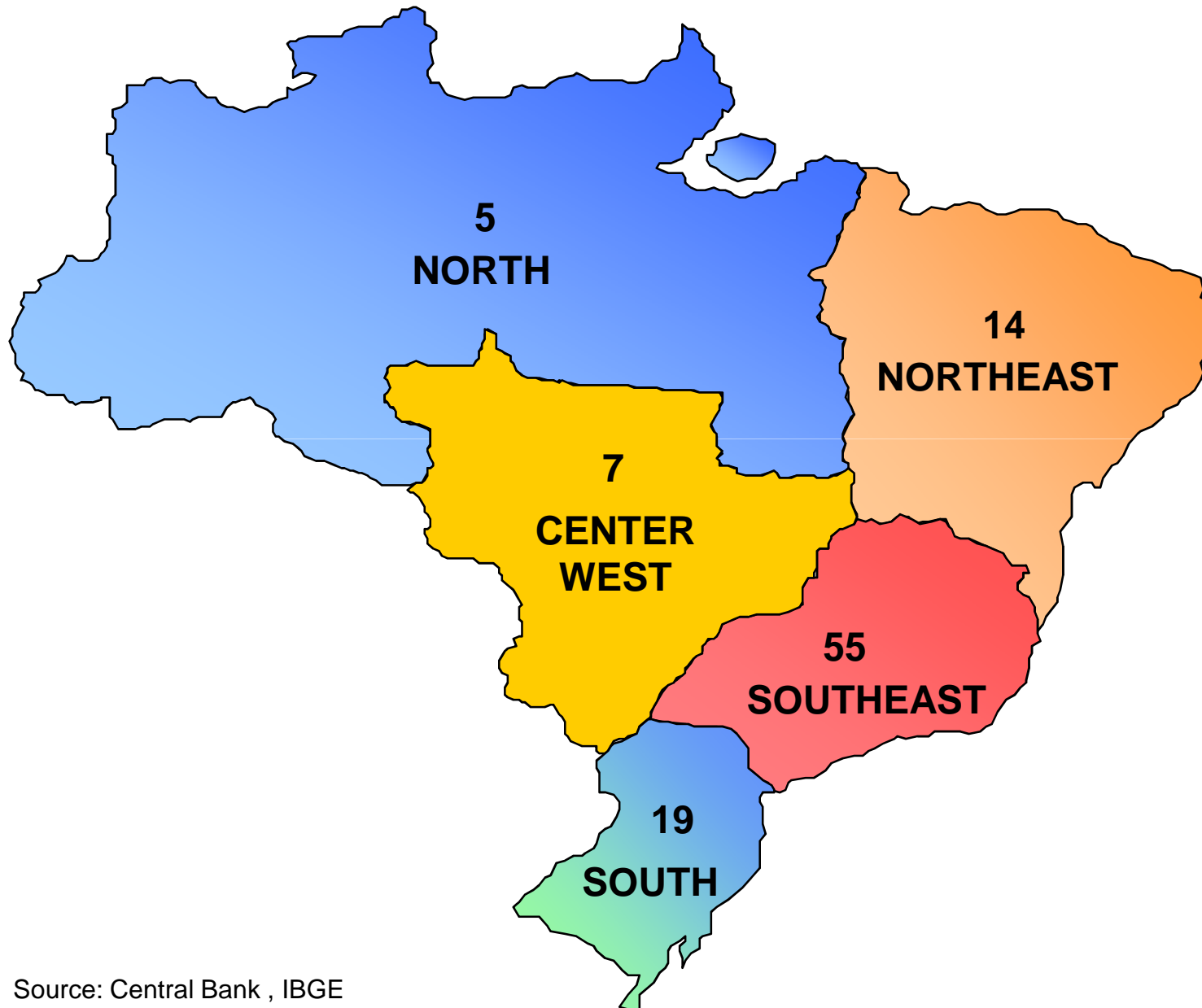


Source: Simonsen Associados, companies interviewed



# BRAZIL: GEOGRAPHIC BREAKDOWN OF GDP 2008 ESTIMATE % BY GEOGRAPHIC REGION

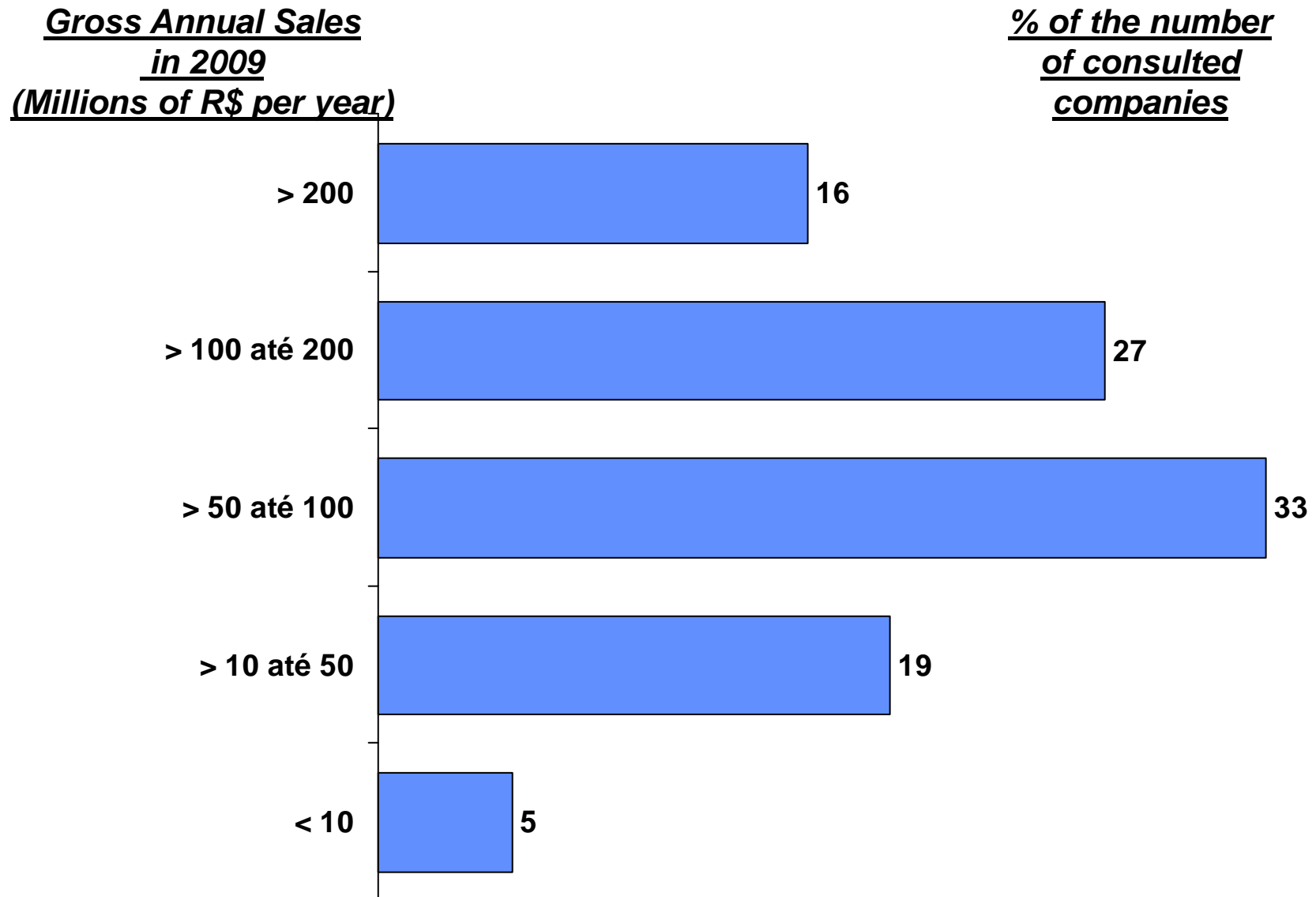
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Source: Central Bank , IBGE



**BREAKDOWN OF THE SAMPLE ACCORDING TO  
THE SIZE OF THE INTERVIEWED COMPANIES IN BRAZIL**



Source: Simonsen Associados, companies interviewed



## **INDICE**

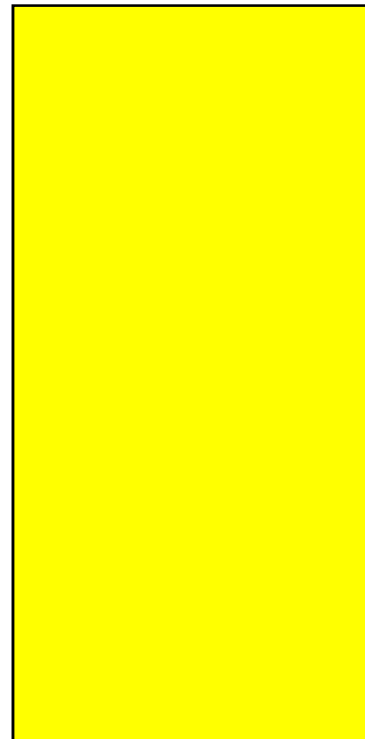
**ABEMD Indicators 2009**

**Growth in the First Semester of 2010**



**BRAZIL: DIRECT MARKETING  
MARKET SIZE ESTIMATE  
( REVENUE )**

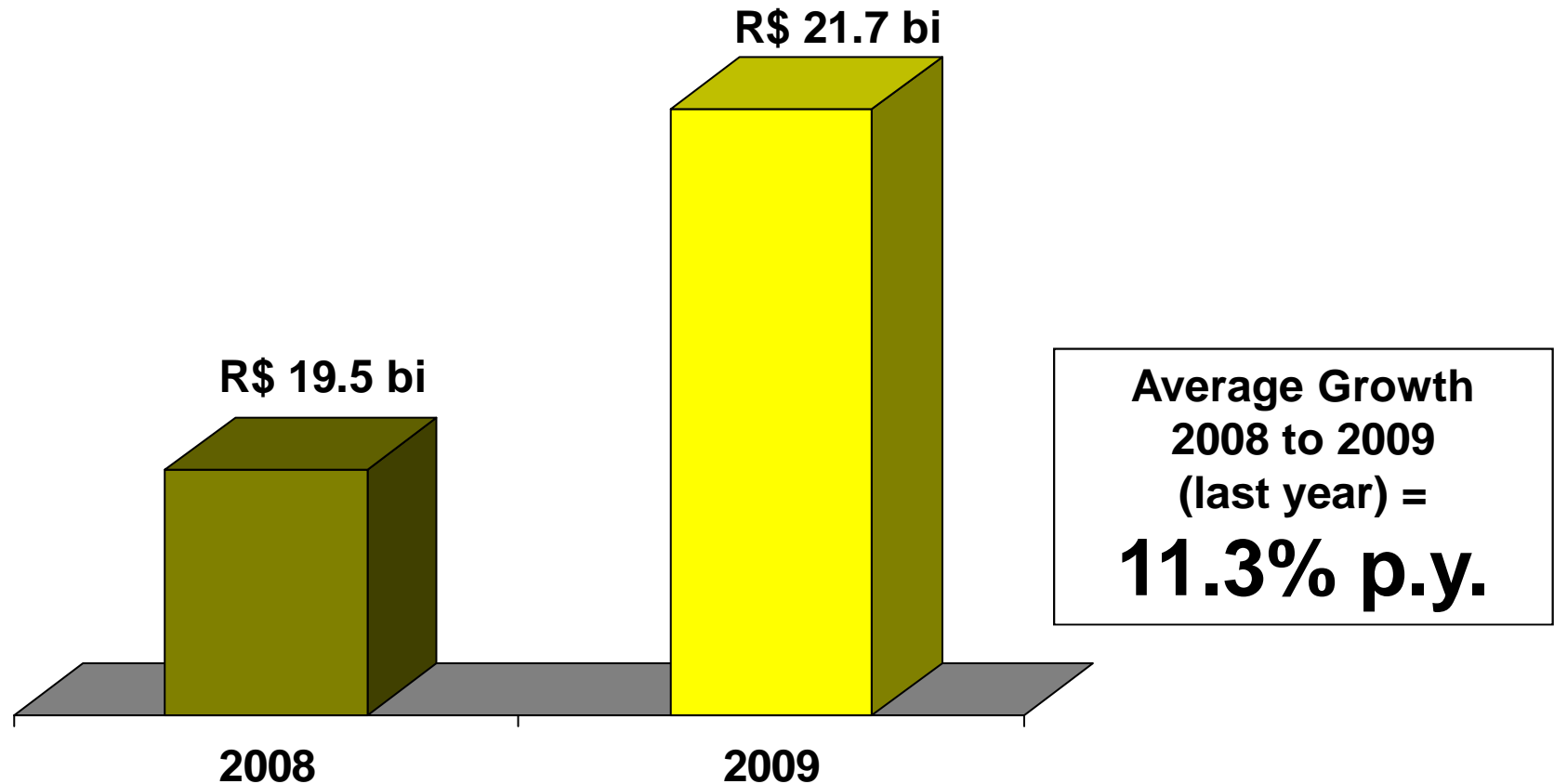
**R\$ 21.7 Bi**



**2009**



## **BRAZIL: DIRECT MARKETING GROWTH RATE (LAST YEAR)**

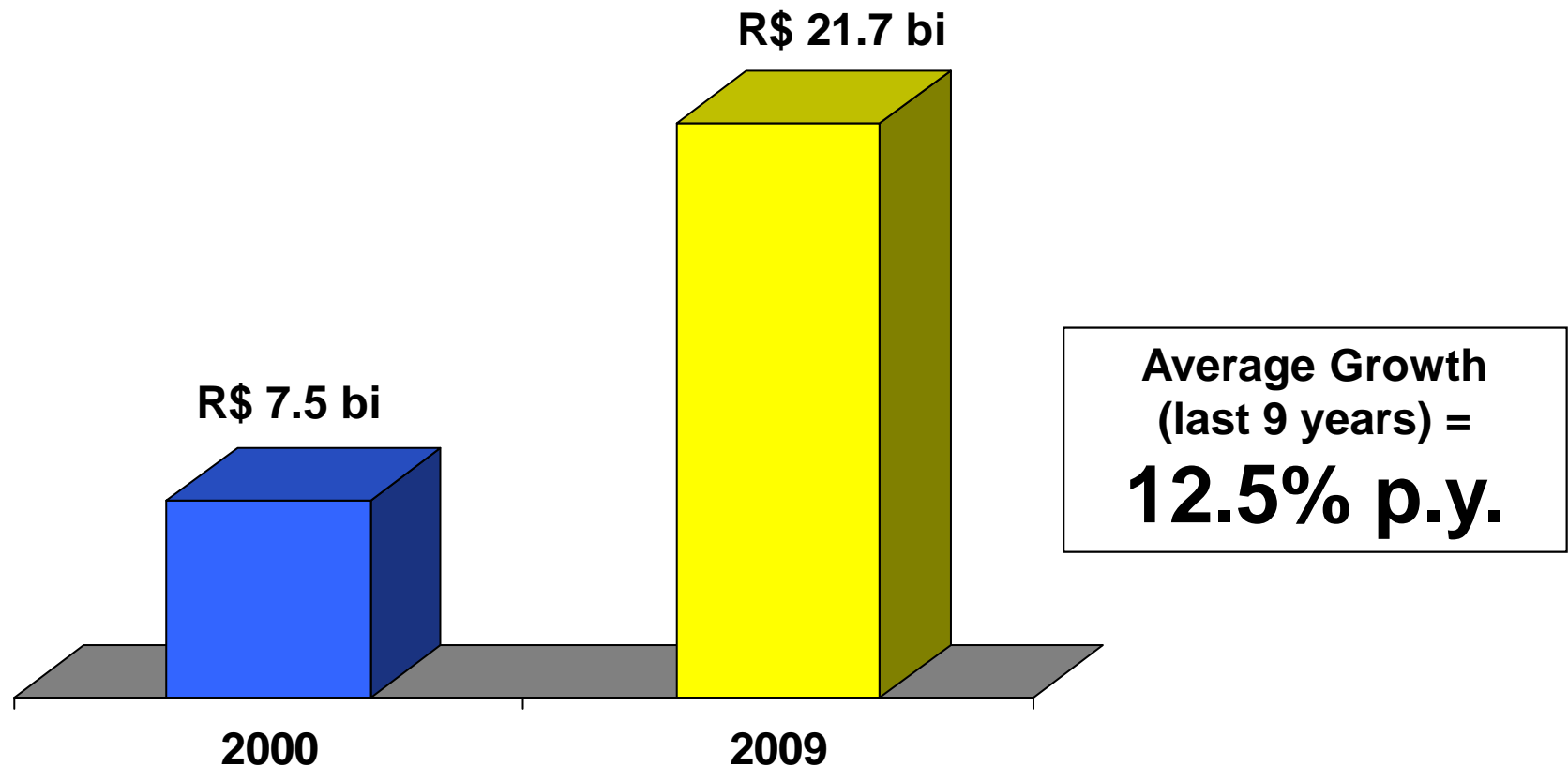


Source: Simonsen Associados, companies interviewed





## **BRAZIL: DIRECT MARKETING GROWTH RATE (LAST 9 YEARS)**



Source: Simonsen Associados, companies interviewed



## **BRAZIL: DIRECT MARKETING MARKET SIZE GROWTH RATES**

**Growth rate  
2008 to 2009**

**(last year) = 11,3% p.y.**

**Growth rate  
2000 to 2009**

**(last 9 years) = 12,5% p.y.**

**Growth rate  
1st Semester 2010 compared to 1st Semester 2009**

**(first semester) = 21,1% p.y.**

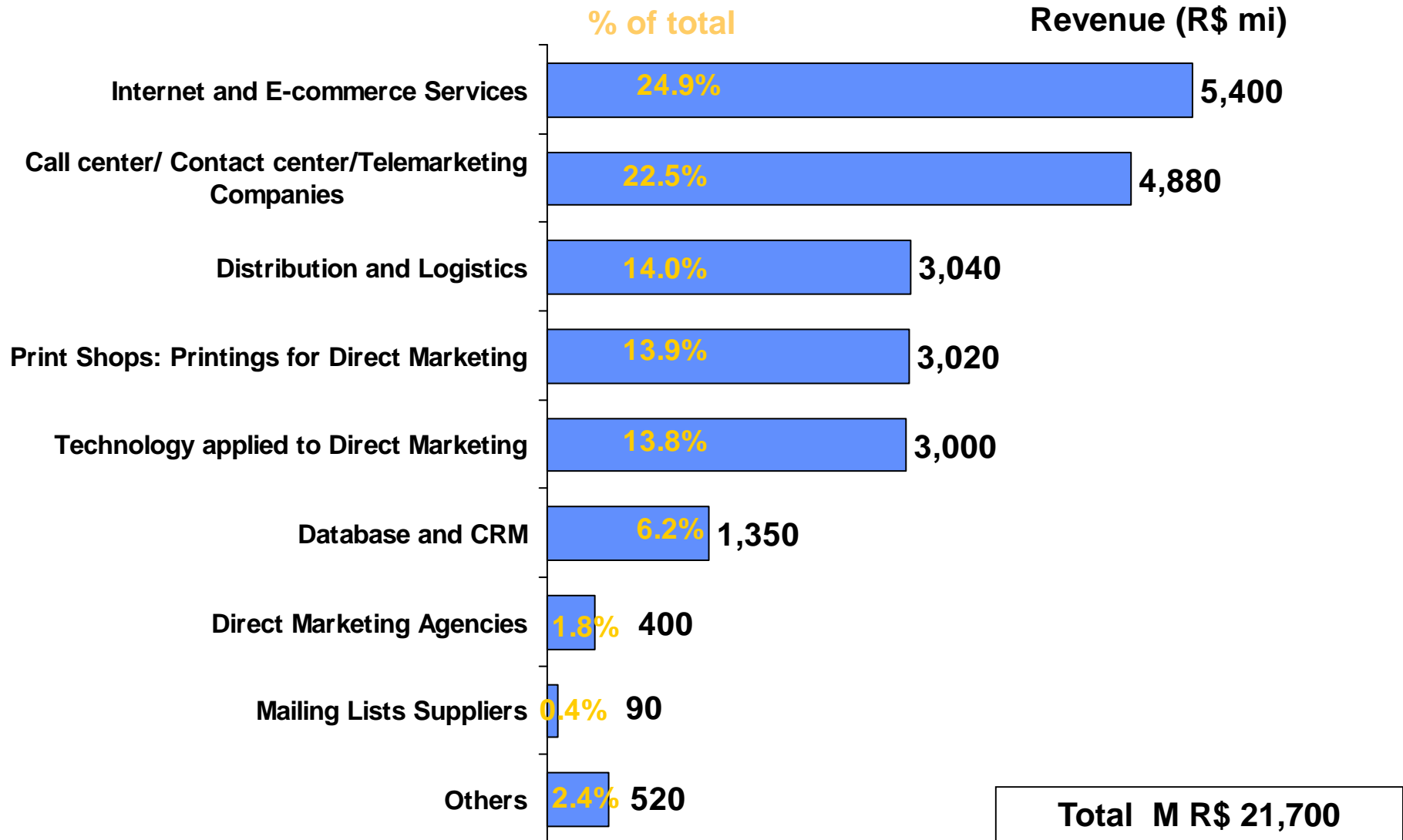
**Future trend according to the point of  
view of the interviewed companies  
2010 to 2014**

**(next 5 years average) = 16,4% p.y.**



# **BRAZIL: DIRECT MARKETING**

## **BREAKDOWN BY MARKET SEGMENT REVENUE: 2009 ESTIMATE\***

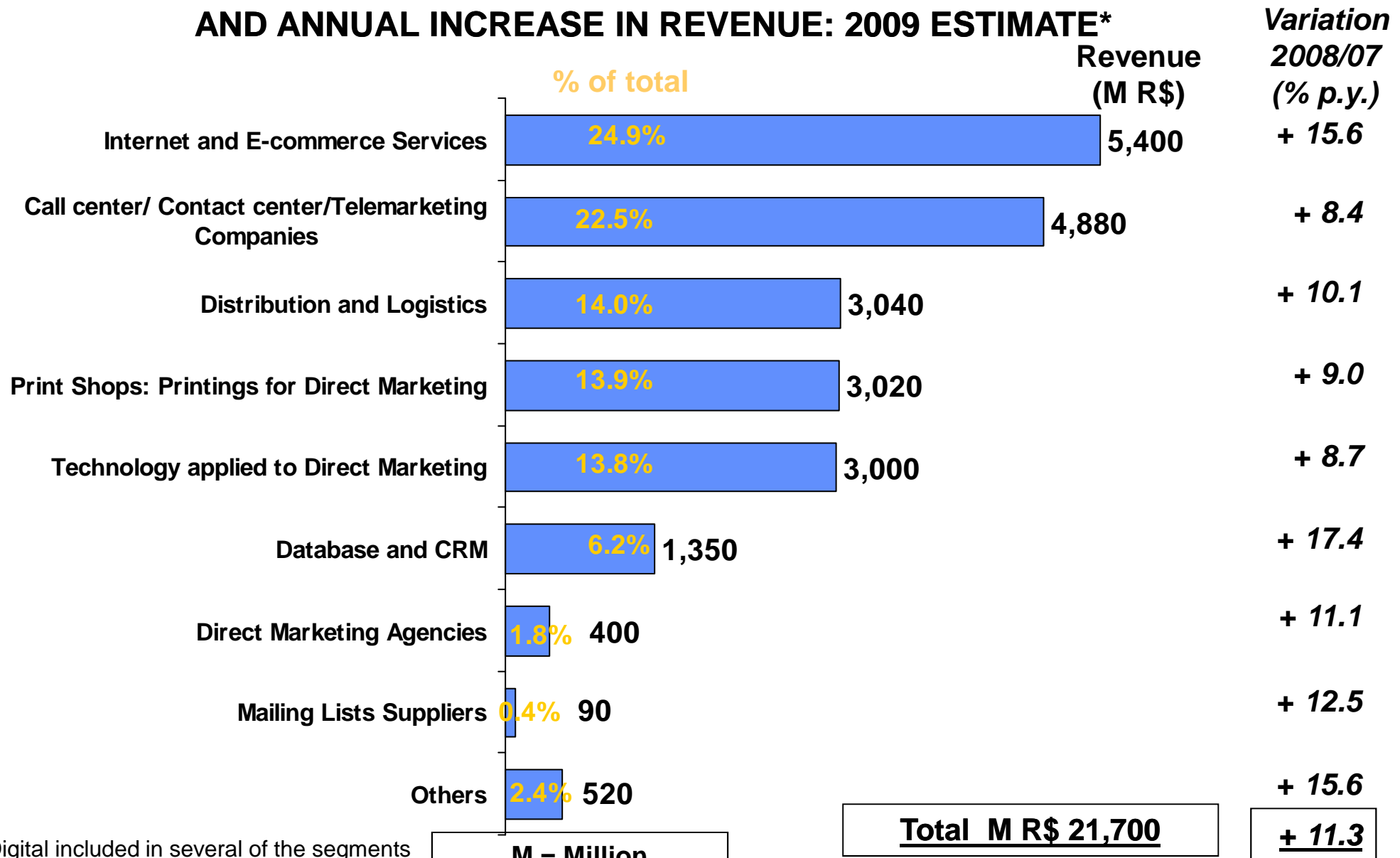


\* Digital included in several of the segments

Source: Simonsen Associados, companies interviewed



**BRAZIL: DIRECT MARKETING  
BREAKDOWN BY MARKET SEGMENT  
AND ANNUAL INCREASE IN REVENUE: 2009 ESTIMATE\***



\* Digital included in several of the segments

**M = Million**



## **COMPARISON OF THE BRAZILIAN DIRECT MARKETING MARKET SIZE WITH GDP - 2009**

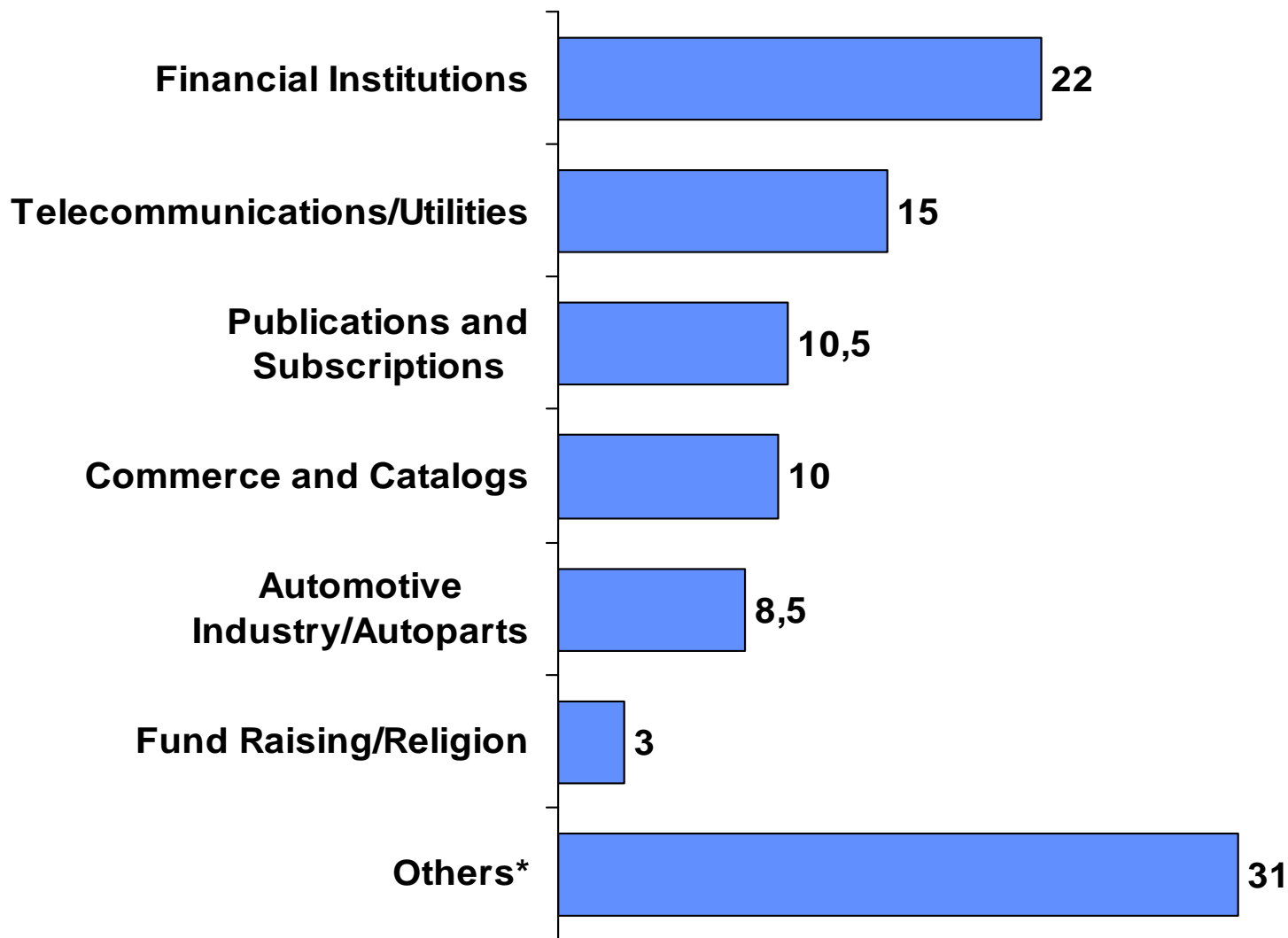
<b>GDP</b>	<b>DIRECT MARKETING MARKET SIZE</b>	<b>SHARE</b>
<b>R\$ 3,143.0 bi</b>	<b>R\$ 21.7 bi</b>	<b>0.69%</b>

\* GDP 2008 = R\$ 3,004.9 billion and Direct Marketing R\$ 19.7 billion or 0.66% of share.

Source: IBGE



**BRAZIL: DIRECT MARKETING  
BREAKDOWN BY MAIN INDUSTRIES  
(% OF VALUE OF 2009)**

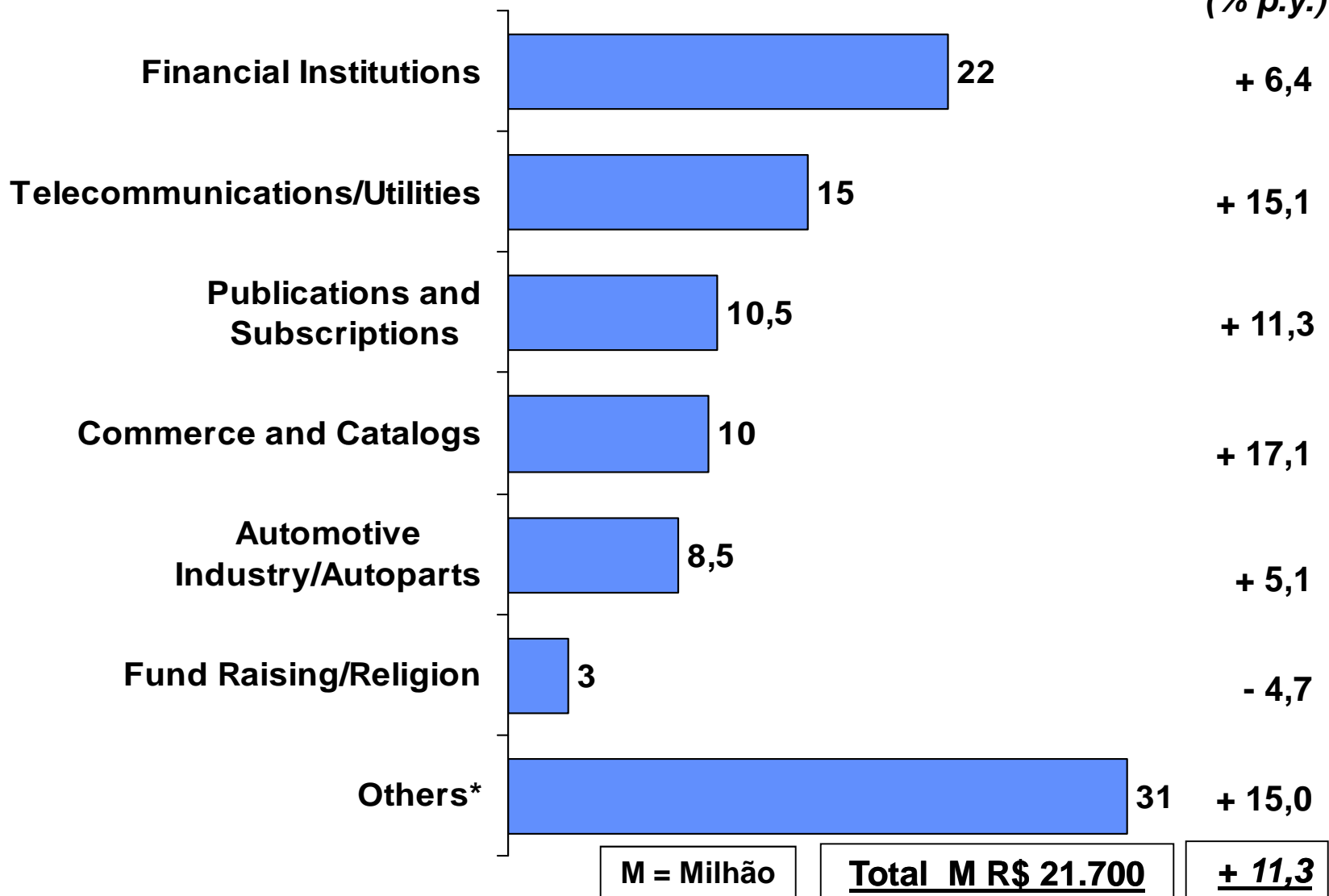


\*: includes several segments, but the main segments are construbusiness and educational

Source: Simonsen Associados, companies interviewed



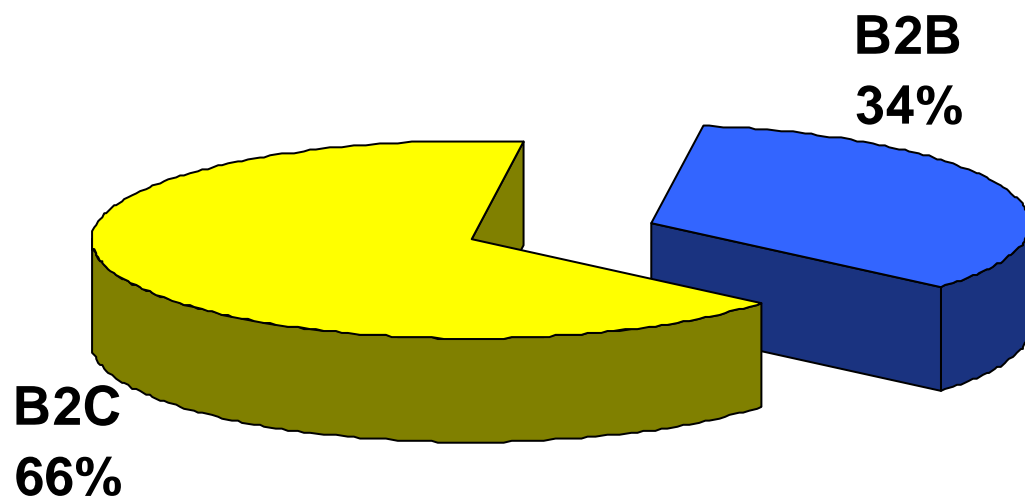
**BRAZIL: DIRECT MARKETING  
BREAKDOWN BY MAIN INDUSTRIES  
(% OF VALUE OF 2009)**



\*: includes several segments, but the main segments are construbusiness and educational  
Source: Simonsen Associados, companies interviewed



**BRAZIL: DIRECT MARKETING  
BREAKDOWN BY TYPE OF BUSINESS  
2009**



**Total = R\$ 21.7 billion**





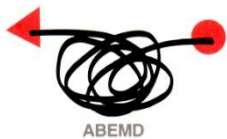
# BRAZIL: DIRECT MARKETING EMPLOYMENT ESTIMATE: HEADCOUNT 2009

**Total**

**1,225 K Direct jobs**

**Growth of 8.4% p.y. in 2009**

Source: Simonsen Associados, companies interviewed



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<b>Conclusion</b>



## CONCLUSION

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- The market size, measured by the revenues of Direct Marketing services provided, was estimated in R\$ 21.7 billion per year in 2009.
- The average growth rate of the last eight years reached 12.5% per year, showing the development of the different segments of the sector.
- The growth of last year, by comparing 2009 to 2008, reached 11.3% p.y. However, the growth rate reaches 21.1% comparing the first semester 2010 to first semester 2009.
- The total headcount in the sector is estimated in 1,225 k employees, with a growth of 8.4% in 2009.



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