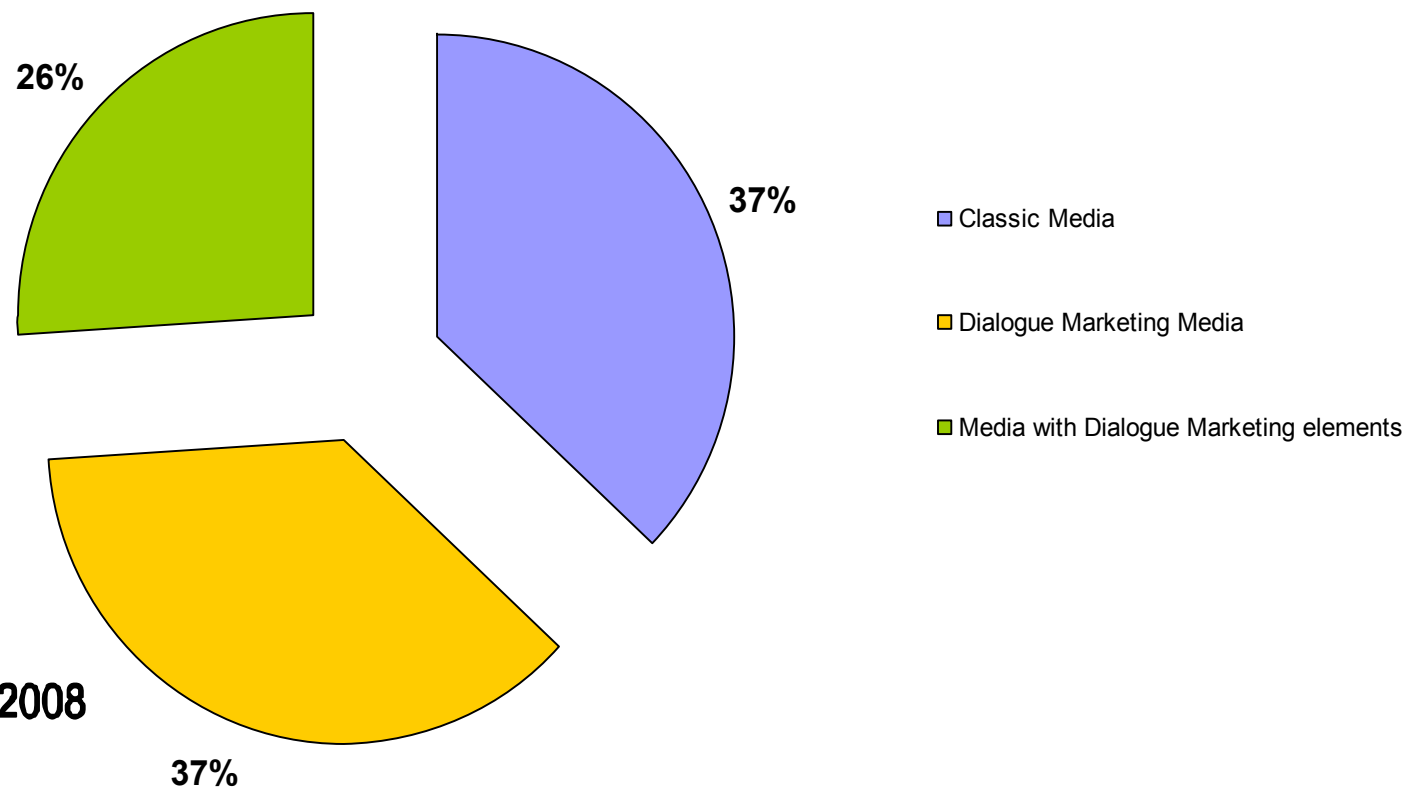


Facts and Figures on Dialogue Marketing in Germany

Webinar FEDMA
November 17, 2009

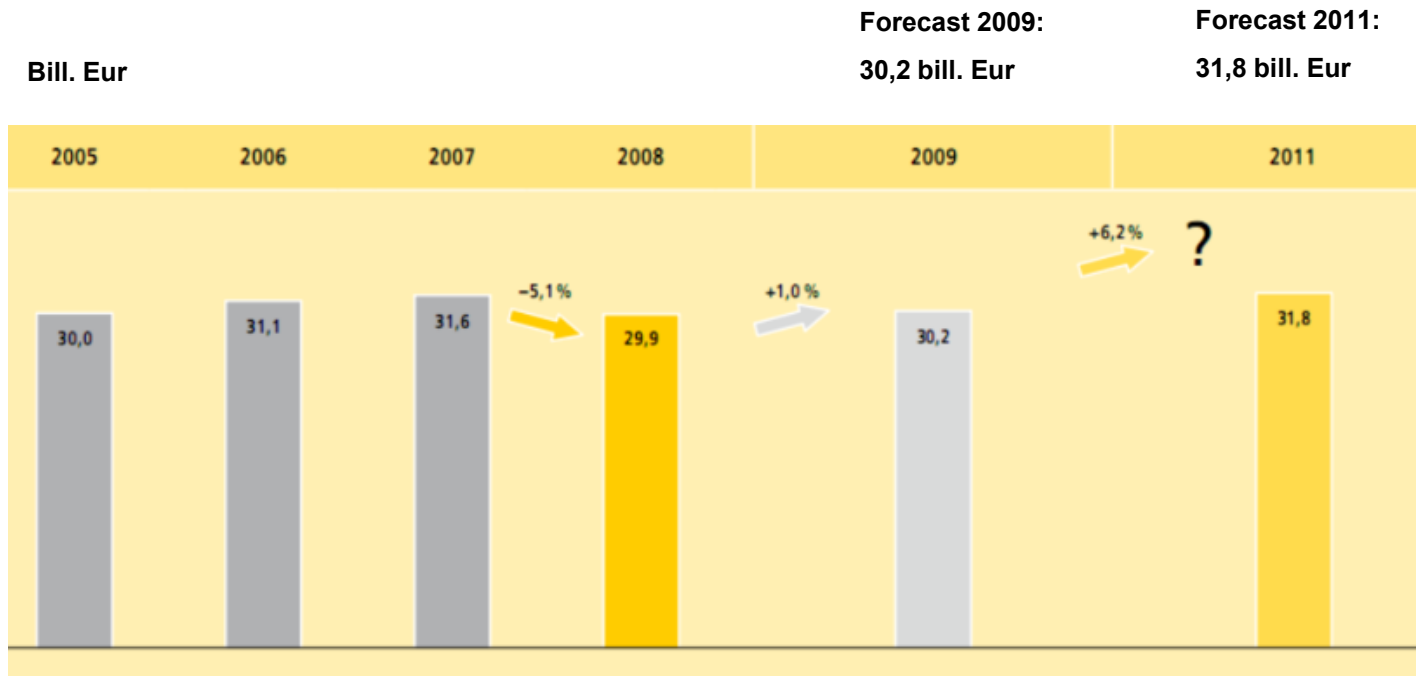


Advertising spending 2008: 80,9 bill.



Dialogue Marketing 2008
29,9 bill. €

Dialogue marketing spending 2005 - 2011



Share of different DM-media on total spending

<u>DM-Category</u>	DM Media	Number of user	Total expenditure (bill. Euro)	Total expenditure (bill. Euro)	Ø Expenditure per user (Tsd. Euro)
Mailings	Completely addressed	536.000 (568.000)	12,0 (12,3)	14,8 (15,4)	22,4 (21,6)
	Partly- and non addressed	395.000 (401.000)	2,8 (3,1)		7,0 (7,8)
Online	Internet	1.762.000 (1.788.000)	4,9 (5,7)	9,9 (10,4)	2,8 (3,2)
	E-Mail-Marketing	498.000 (400.000)	1,8 (2,1)		3,6 (5,1)
	Ext. Online Marketing	971.000 (635.000)	3,2 (2,6)		3,3 (6,1)
Telemarketing	Outbound	399.000 (408.000)	2,7 (3,0)	5,3 (5,8)	6,9 (7,3)
	Inbound	386.000 (557.000)	2,5 (2,8)		6,6 (5,0)
Total		2.211.000 (2.247.000)	29,9 (31,6)		13,5 (14,1)

German Dialogue Marketing Association (DDV)

- **Founded 1948**
- **Located in Wiesbaden (near Frankfurt)**
- **739 members**
- **Tasks:**
 - **consumer dialogue & information**
 - **lobbying & public relations**
 - **platform for know-how**
 - **networking**
 - **legal aid**
 - **developing self regulation instruments, quality standards, and education & research in DM**



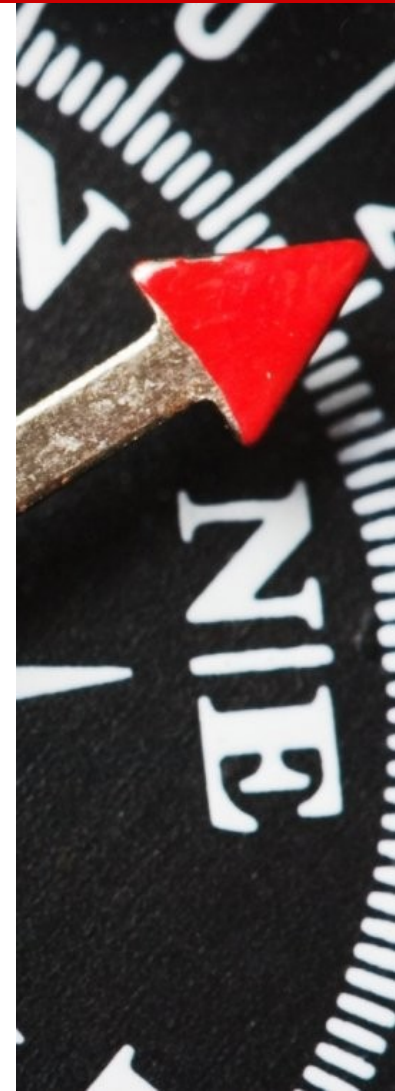
Member companies separated in nine councils

- **Customer Relationship Management**
- **Dialogmarketing-Agencies**
- **Digital Dialogue**
- **Direct Sales & Relations**
- **DirectMail Services**
- **List Council**
- **Print & Service**
- **TeleMedien- und CallCenter-Services**
- **Distribution (of unaddressed marketing materials)**
+
- **Users (=companies which apply DM)**



German Data Protection Act

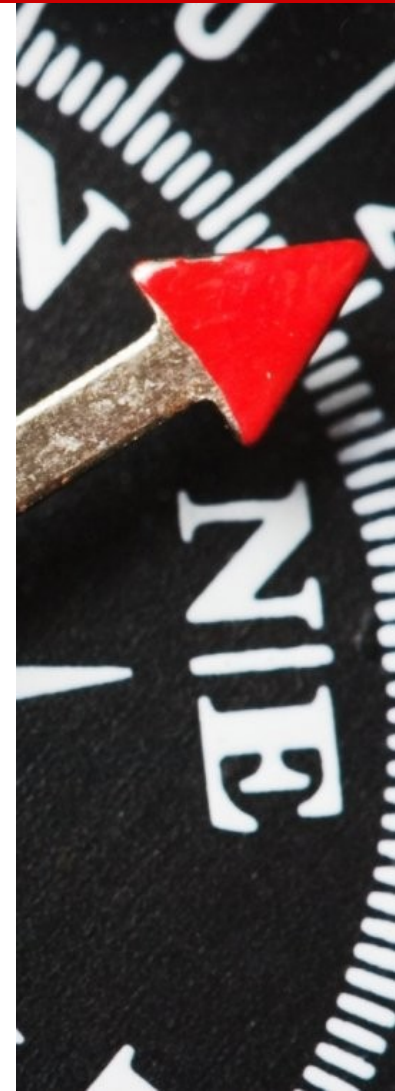
- **Legislative process prompted by data scandals in summer 2008**
- **Amendment I (Scoring) will come into force on 1 April 2010**
- **Amendment II (Data Trading) came into force on 1 September 2009**
- **Main shift for Data Trading from opt-out (before) to opt-in (now): general consent for marketing use required**



Six exceptions to the general requirement

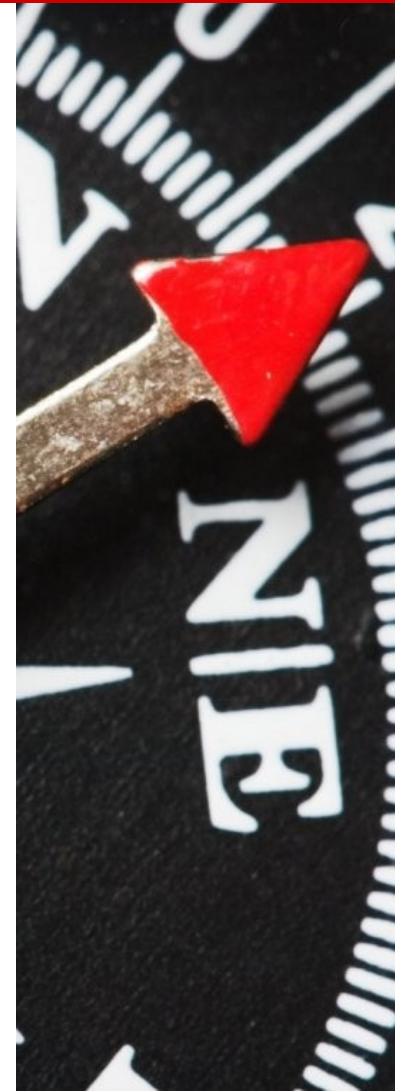
Processing or use of personal data for marketing purposes is still allowed without opt-in for

- 1. existing customers**
- 2. addresses/data from public directories**
- 3. B2B**
- 4. charitable purposes**
- 5. data transfer if the original source of the data is disclosed**
- 6. data use if the controller of the data is disclosed**



Lobbying steps

- **enforced our public relations efforts**
- **sought for cooperations with other associations and big companies**
- **participated in numerous hearings and talks with politicians and public authorities, filed petitions**
- **filed a legal opinion at the German parliament and together with FEDMA at the EU-Commission on the non-compatibility of the German Data Protection Act with the European Data Protection Directive**
- **supported our members by involving their local MPs in the discussion**
- **asked our members for additional member fees in 2008 and 2009 to finance the lobbying steps**



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