

Delivering Performance in the Era of AI:

Technology, Data and New Opportunities to Unlock Omnichannel Success

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May 4, 2026

Winterberry Group: A Growth Consultancy Specializing in Marketing, Advertising, Technology, Data & Analytics



What We Do



- **Growth Strategy:** evaluate diverse opportunities and build comprehensive, actionable plans to drive expansion, build value
- **Operational Design:** put strategy into practice through architecture of new practice areas, implementation of “build” and “buy” growth initiatives
- **Mergers & Acquisitions:** help investors make sound, informed decisions through commercial due diligence, target identification
- **Market Intelligence:** compile and publish original insights grounded in rigorous primary, secondary research



We've Been Tracking the Evolution of DM Long Enough to Have Seen Multiple "Next Big Things" Shift the Conversation

Vertical Market Trends in Direct Mail
and the Impact on
Production Service Providers

A White Paper

March 2004



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Multichannel



Big Data



Programmatic

As Usual, This Latest Giant Leap Forward Presents More Questions Than Answers

- How is AI **meaningfully different** than other technology?
- What does it allow marketers to do that **wasn't previously possible**?
- Are early adopters actually seeing **results in practice**?
- Does AI represent a net **opportunity or challenge** for brands, service providers, investors?
- How do we **prepare to optimize** the value-creating impact of AI in the years ahead?



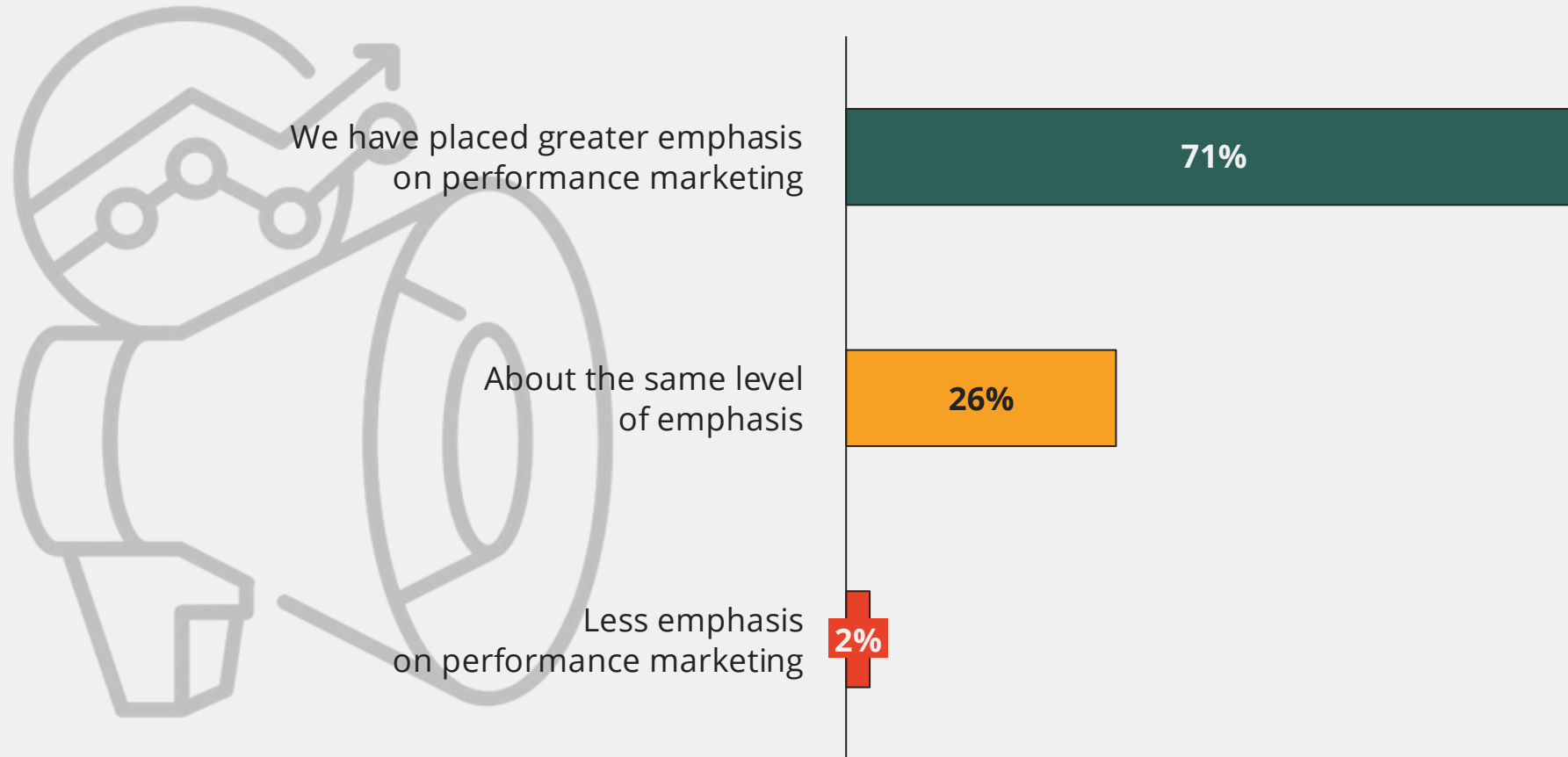
- Surveyed **over 250 U.S. marketers** with diverse media channel ownership (including direct mail), spanning 10+ vertical markets (March/April 2026)
- Interviewed **dozens of industry thought leaders** from agency, data, technology and specialty solution disciplines

***The Great Performance Pivot...
Rolls On***



Across Channels, Verticals and Geographies, Brands Are Prioritizing Performance Now More Than Ever

How has your organization's emphasis on performance-oriented marketing changed over the past three years?
(% of respondents, single select)

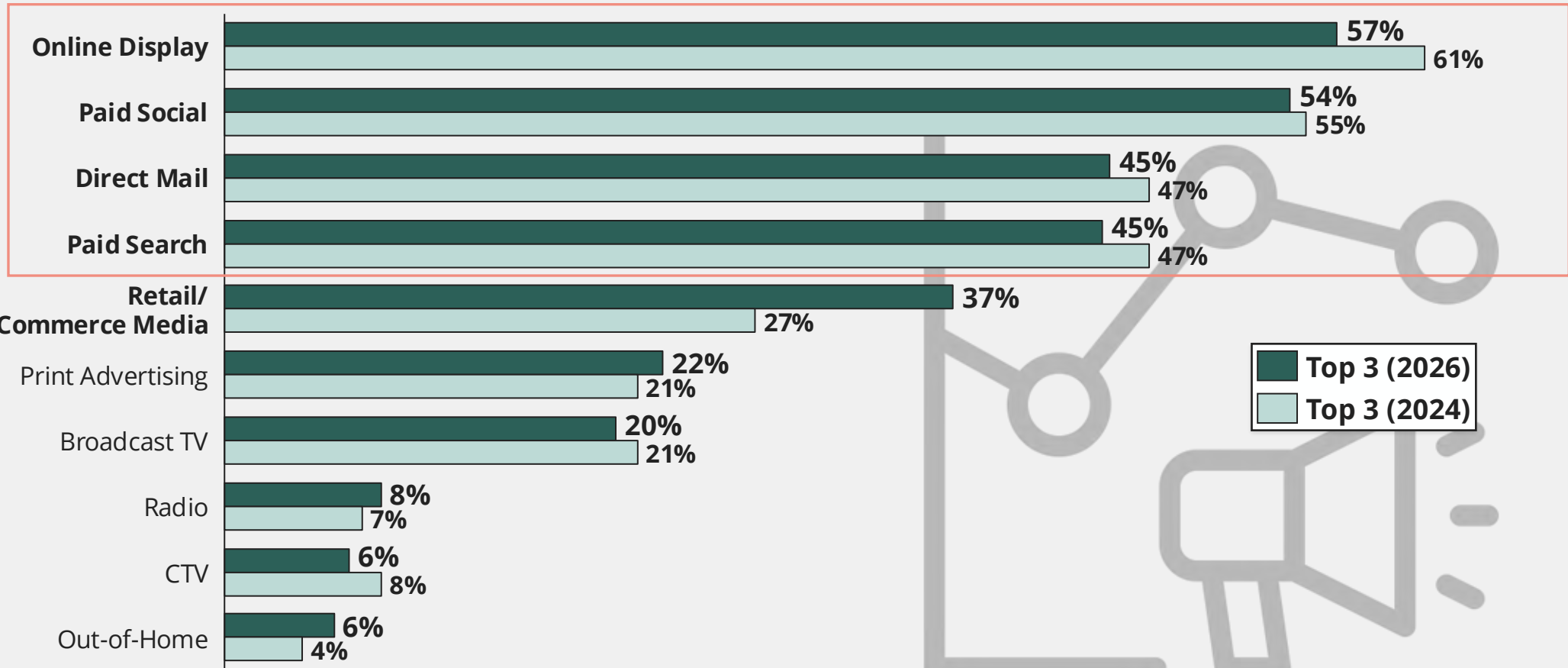




Direct Mail Central to Performance Efforts

The Performance Media Mix is Increasingly Varied, Spanning Traditional and Digital Media, Both “Established” and “Emergent”

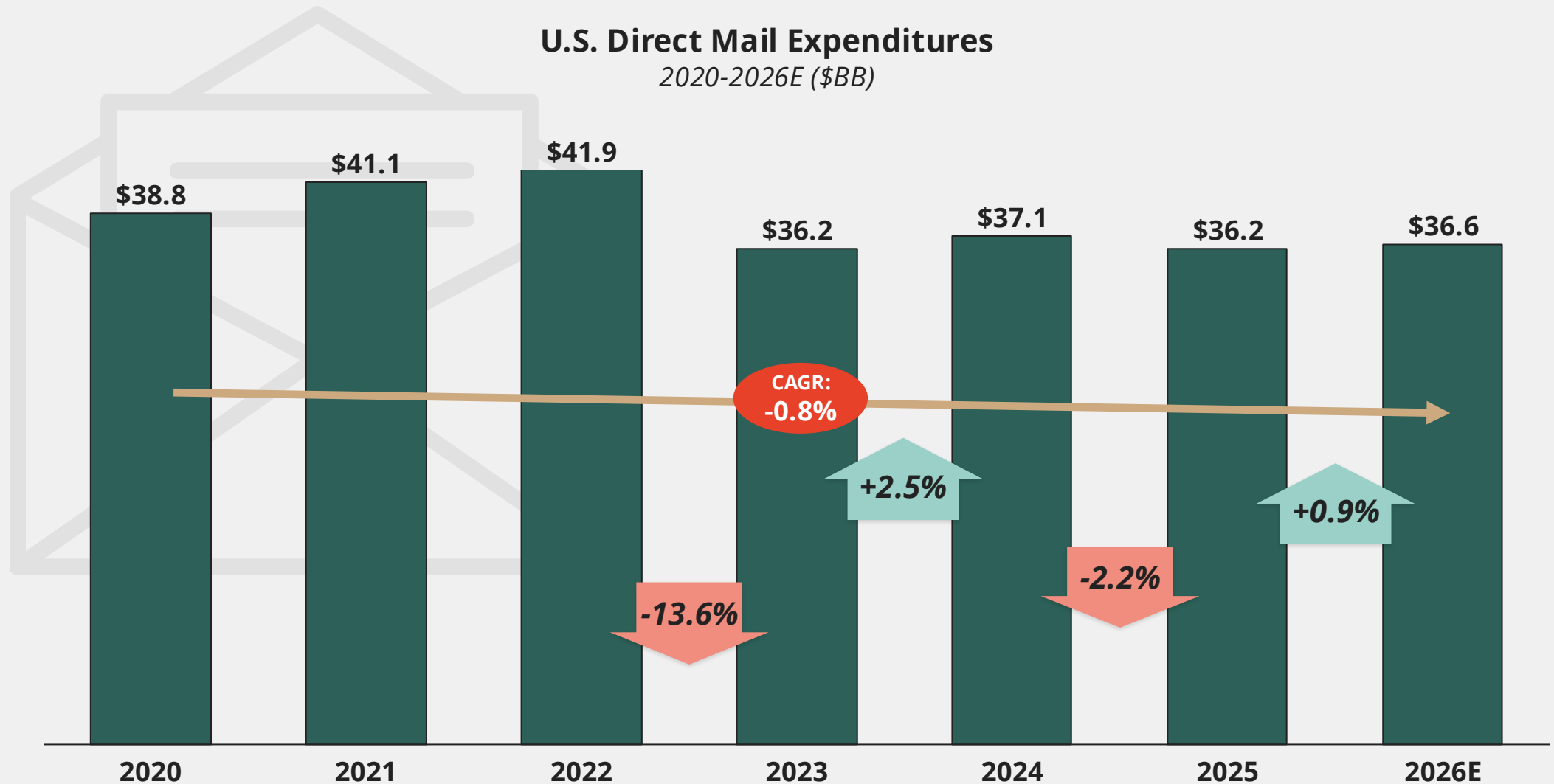
Which of the following channels are most important in supporting your organization’s performance marketing objectives?
 (% of respondents, Top 3)



2026 N=251; 2024 N=201 (U.S. marketers and media professionals with oversight for direct mail and other advertising/marketing channels)
 Source: Winterberry Group (2026)

That Central Performance Role Explains DM's Budgetary Durability...

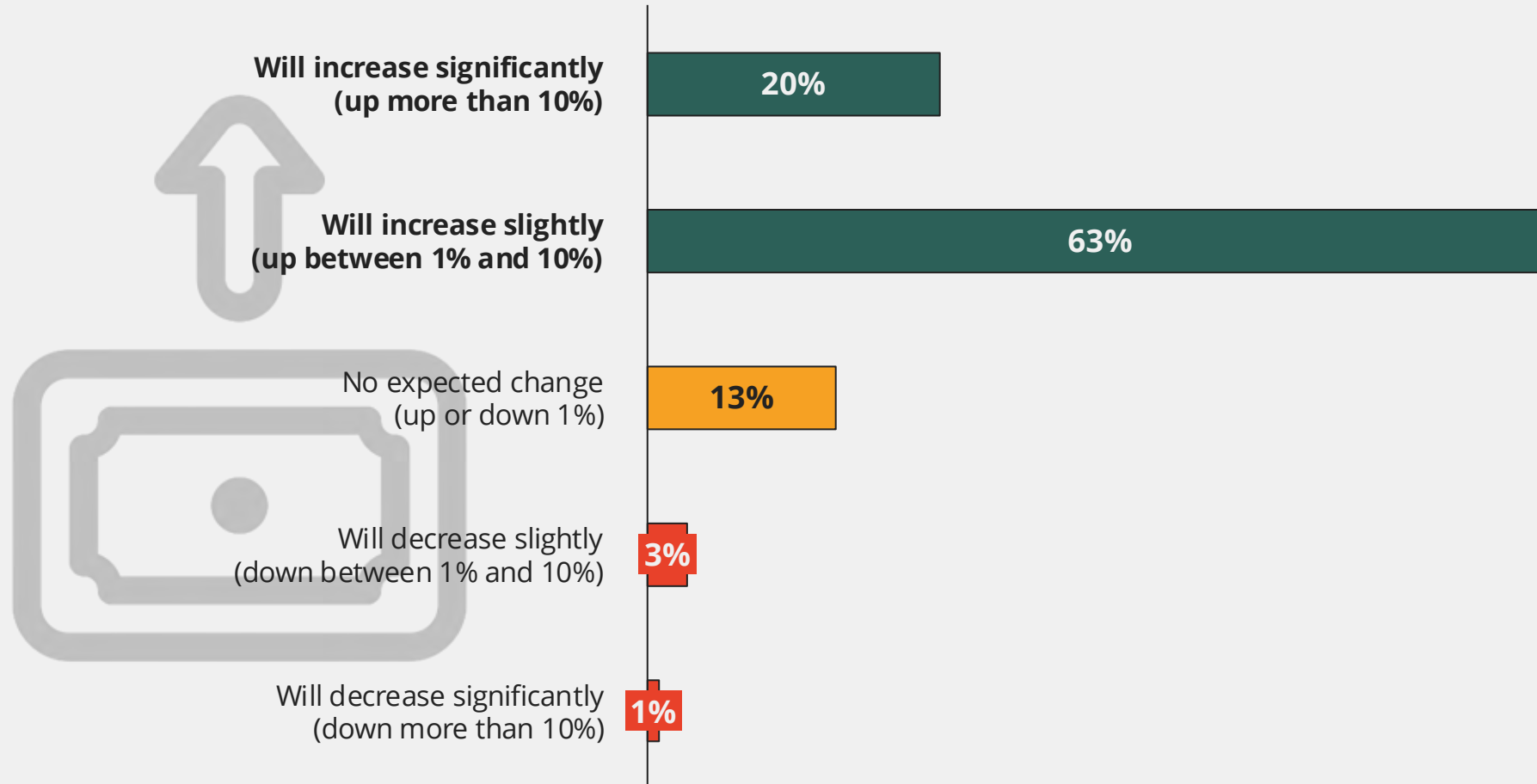
U.S. Direct Mail Expenditures
2020-2026E (\$BB)



Note: Includes U.S. marketer investment in postage, materials, printing and mailing services, licensed data/lists, data management/hygiene, agency services and other functions associated with direct mail campaign development and execution
Source: Winterberry Group (2026)

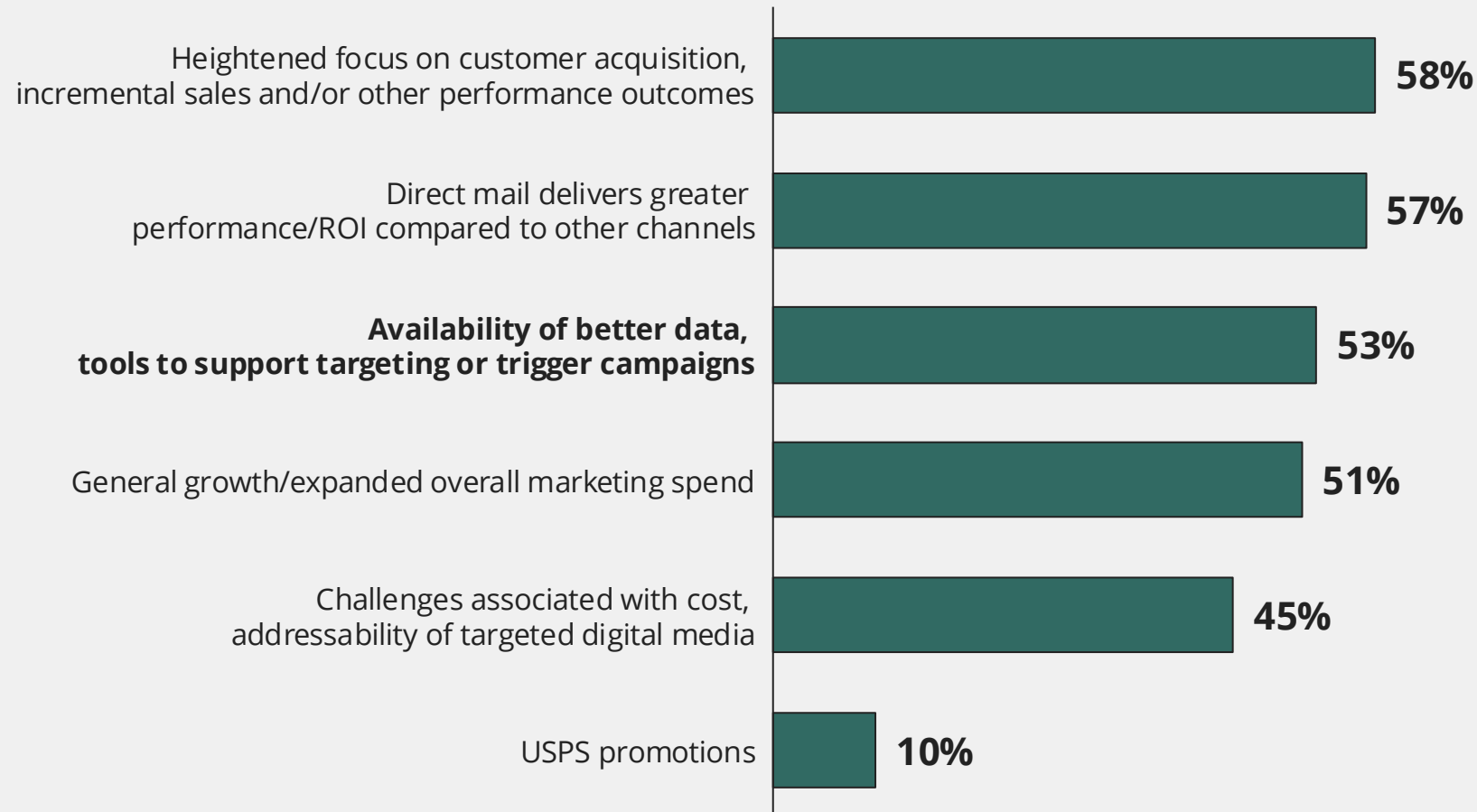
... And Speaks to the Enthusiasm that Brands Associate with the DM Channel, Year After Year

How do you expect your organization's spending on DM will change in 2026, relative to last year?
(% of respondents)



Advances in Data, Technology Present Solid Foundations Upon Which Brands Are Basing Their Plans to Invest in DM

Which of the following factors do you expect to be most responsible for driving your organization's expected 2026 increase in DM spending?
(% of respondents)



Top Factors Cited as Drivers of Expected DM Spending Growth in 2024:

- Expanded overall marketing spending**
- Growing cost of competitive media channels**
- Availability of better data**
- Heightened focus on customer retention/loyalty**



The AI (R)evolution Has Arrived

So What Is AI, Anyway?



So What Is AI, Anyway?



ART GENERATED WITH CHATGPT 5.2

AI-GENERATED

LIVE EVENT

NPF 2026

PARADIGM-SHIFTING THOUGHT LEADERSHIP OPPORTUNITY

Delivering Performance in the Era of AI

// Technology - Data - Omnichannel - Synergy - Disruption - Innovation
//

NEURAL PATHWAY ACTIVATED

97%

AI CONFIDENCE

#1

PREMIER
SESSION

∞

SYNERGIES

Machine Learning

Blockchain-Ready

Omnichannel

Next-Gen

Disruption

Data-Driven

Hyper-Personalised

Scalable

Transformative

Postal Innovation

Thought Leadership

AI-Powered

REGISTER NOW — LIMITED SEATS —
ACT FAST

*Results may vary. Paradigms not guaranteed to shift.
No neural pathways were harmed in this graphic's creation.
Image, text & enthusiasm 100% generated by AI.

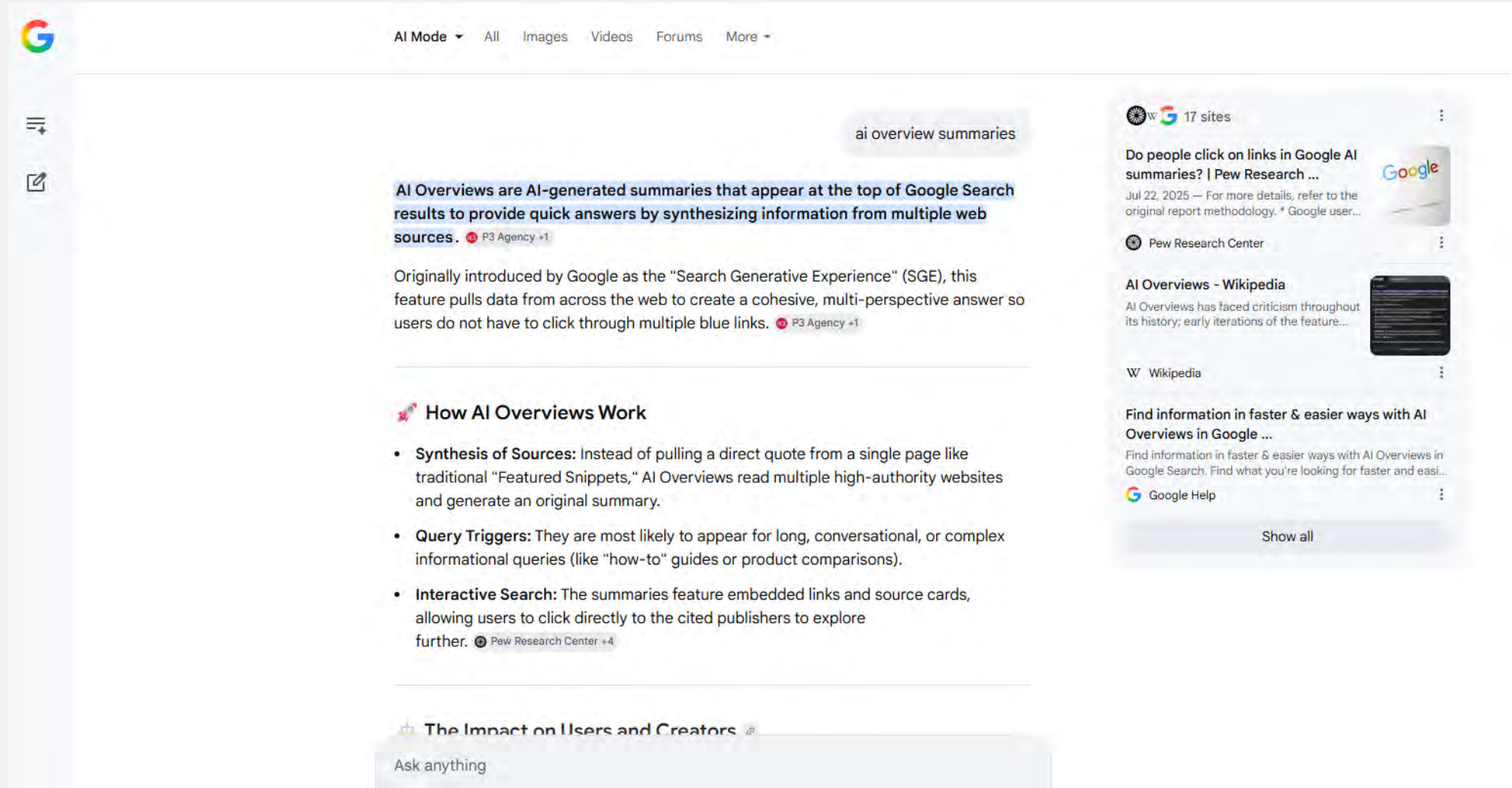


Jonathan Margulies

"A visionary thought leader
disrupting the postal-
omnichannel
AI synergy continuum"

AI-generated bio

As AI Disrupts Their Ability to Engage Digital Audiences, Brands Are Vesting Renewed Importance in High-Impact, Real-World Content



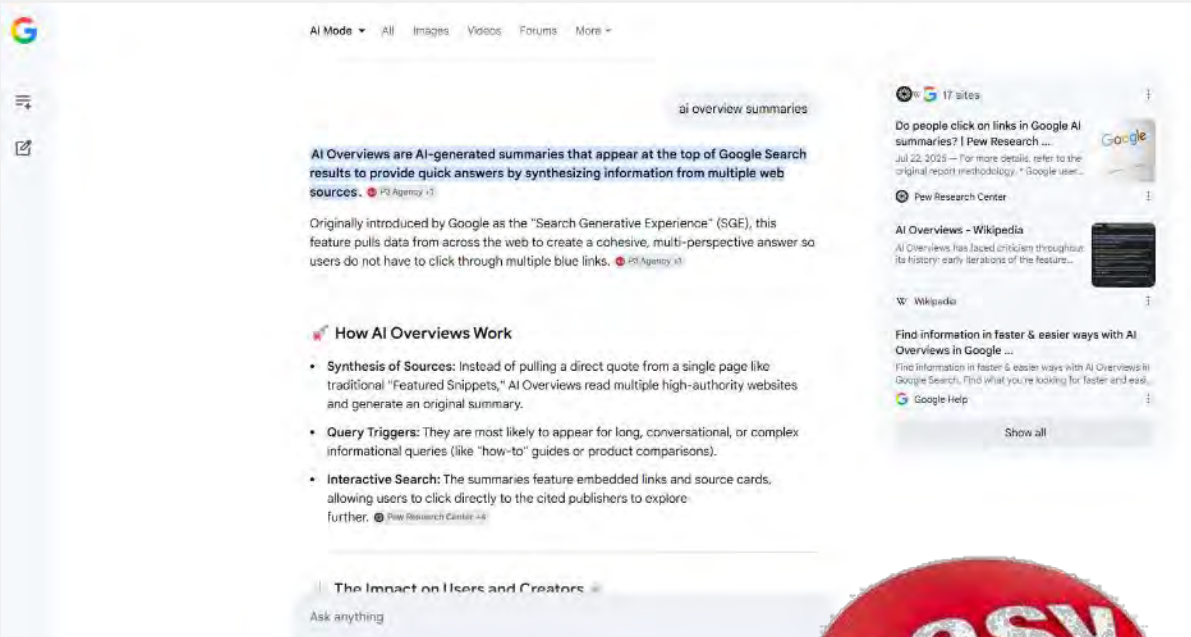
The screenshot shows a Google search interface with the following elements:

- Search Bar:** "ai overview summaries"
- AI Overview Summary:**

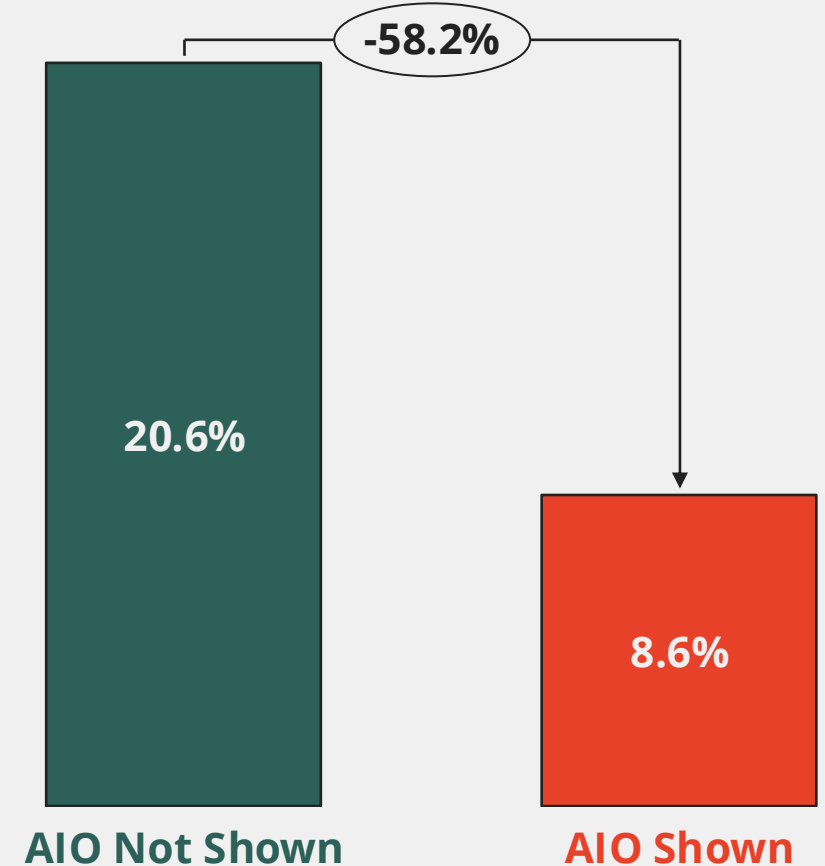
AI Overviews are AI-generated summaries that appear at the top of Google Search results to provide quick answers by synthesizing information from multiple web sources. P3 Agency +1

Originally introduced by Google as the "Search Generative Experience" (SGE), this feature pulls data from across the web to create a cohesive, multi-perspective answer so users do not have to click through multiple blue links. P3 Agency +1
- Section: How AI Overviews Work**
 - Synthesis of Sources:** Instead of pulling a direct quote from a single page like traditional "Featured Snippets," AI Overviews read multiple high-authority websites and generate an original summary.
 - Query Triggers:** They are most likely to appear for long, conversational, or complex informational queries (like "how-to" guides or product comparisons).
 - Interactive Search:** The summaries feature embedded links and source cards, allowing users to click directly to the cited publishers to explore further. PeW Research Center +4
- Section: The Impact on Users and Creators**
- Search Results:**
 - Do people click on links in Google AI summaries? | Pew Research ...** (Jul 22, 2025)
 - AI Overviews - Wikipedia**
 - Find information in faster & easier ways with AI Overviews in Google ...**
- Search Bar:** "Ask anything"

As AI Disrupts Their Ability to Engage Digital Audiences, Brands Are Vesting Renewed Importance in High-Impact, Real-World Content

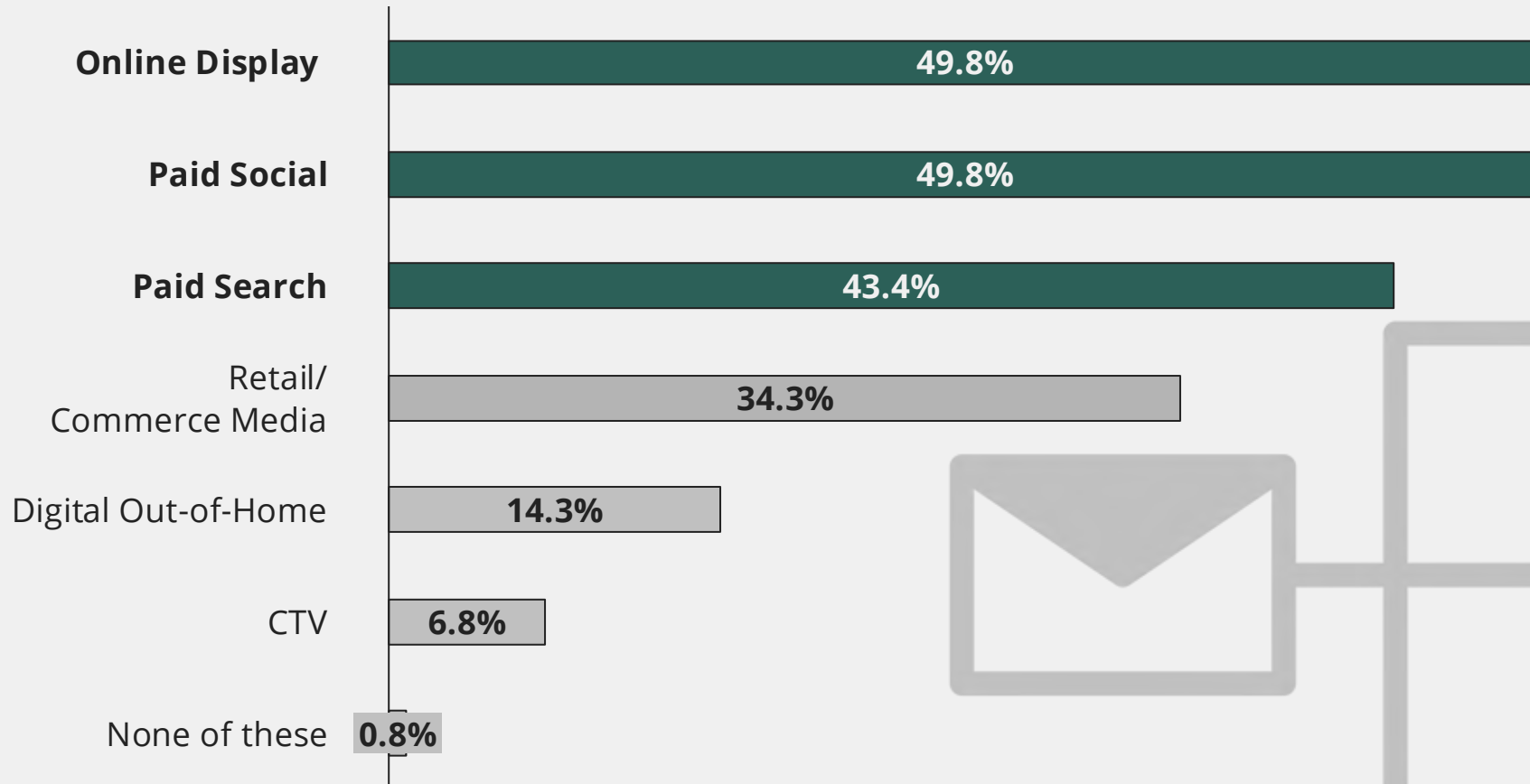


Average Google Paid Search Click-Through Rate (AI Overview Shown vs. Not Shown) 2024 (Click-Through Rate %)



That Disruption is Driving Expanded Interest in True “Omnichannel” Execution

Among the digital channels your organization leverages, which tend to benefit from the greatest performance improvement when deployed in conjunction with DM?
(% of respondents)

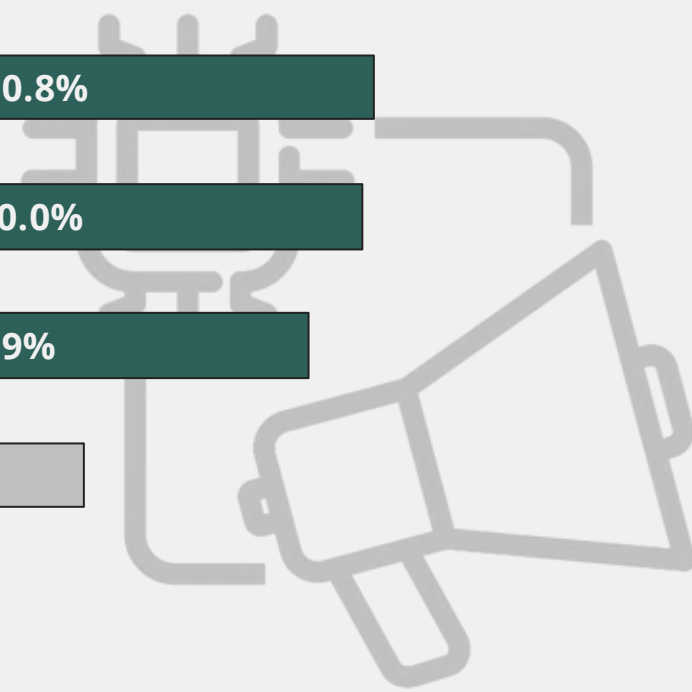
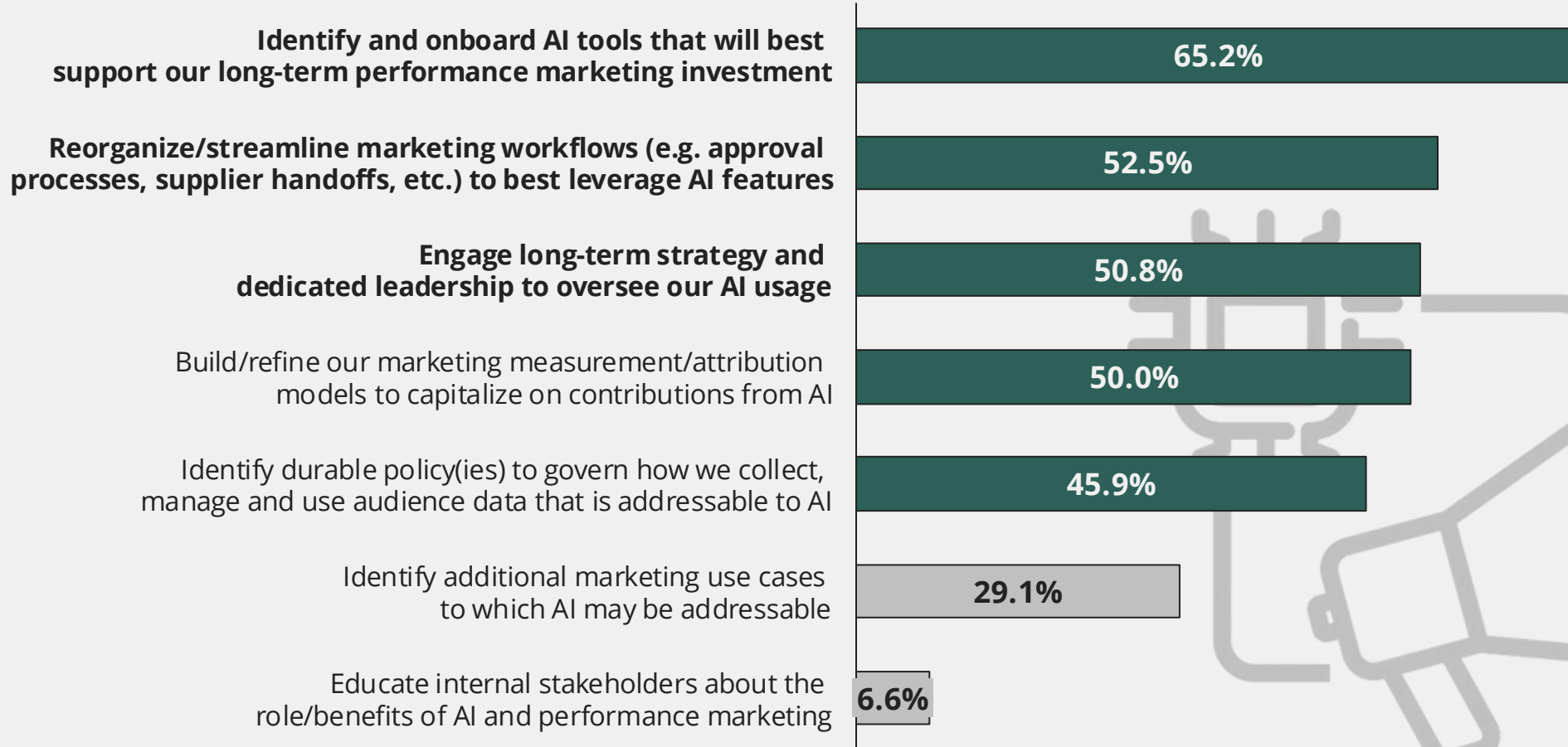


N=251 (U.S. marketers and media professionals with oversight for direct mail and other advertising/marketing channels)
Source: Winterberry Group (2026)

What Brands Know for Sure: AI is Here to Stay. And They Need the Tools and Talent to Put it to Work

What are your organization's top priorities as you consider how to best capitalize on AI as a tool to support your performance marketing efforts?

(% of respondents)

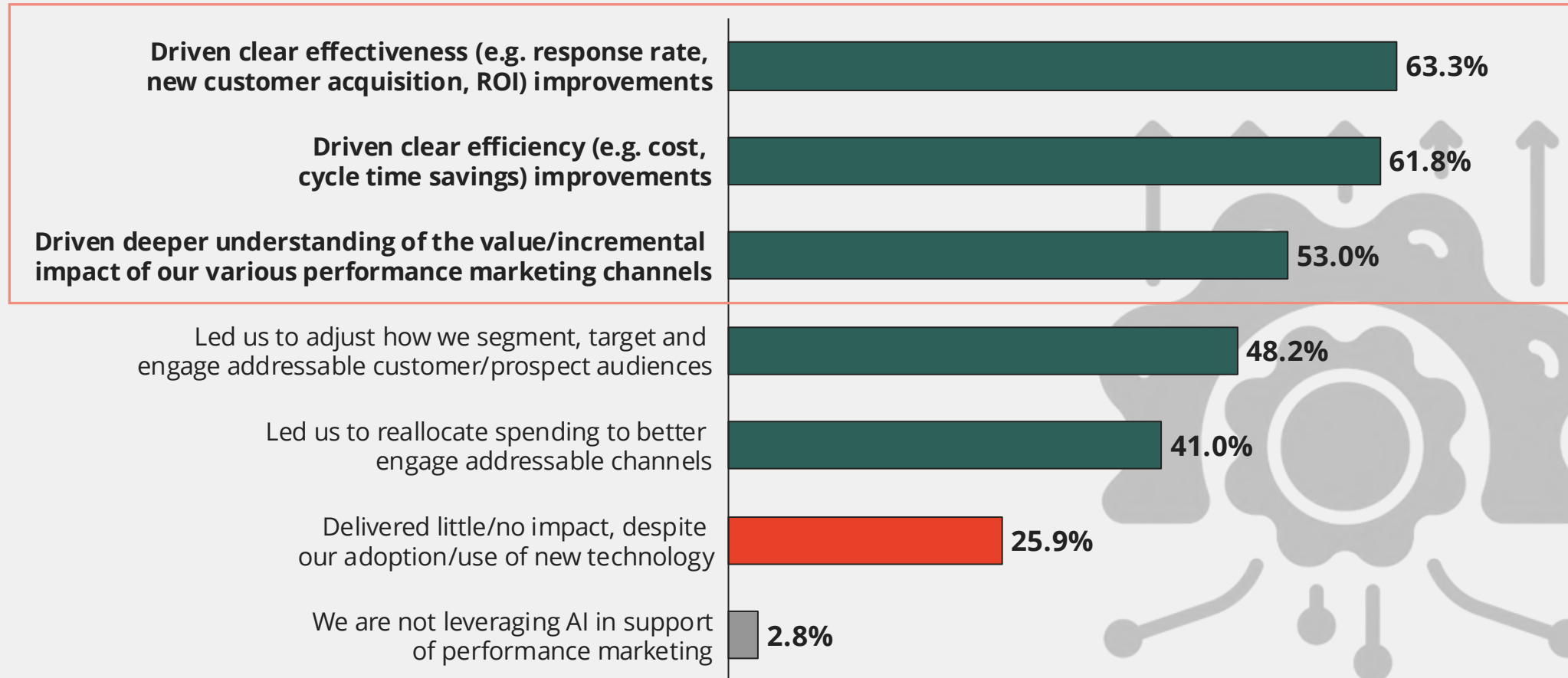


Marketers Making Rapid Progress Up the AI Maturity Curve



Brands Have Advanced Significantly in Their Efforts to Deploy AI in Support of Performance Marketing, DM

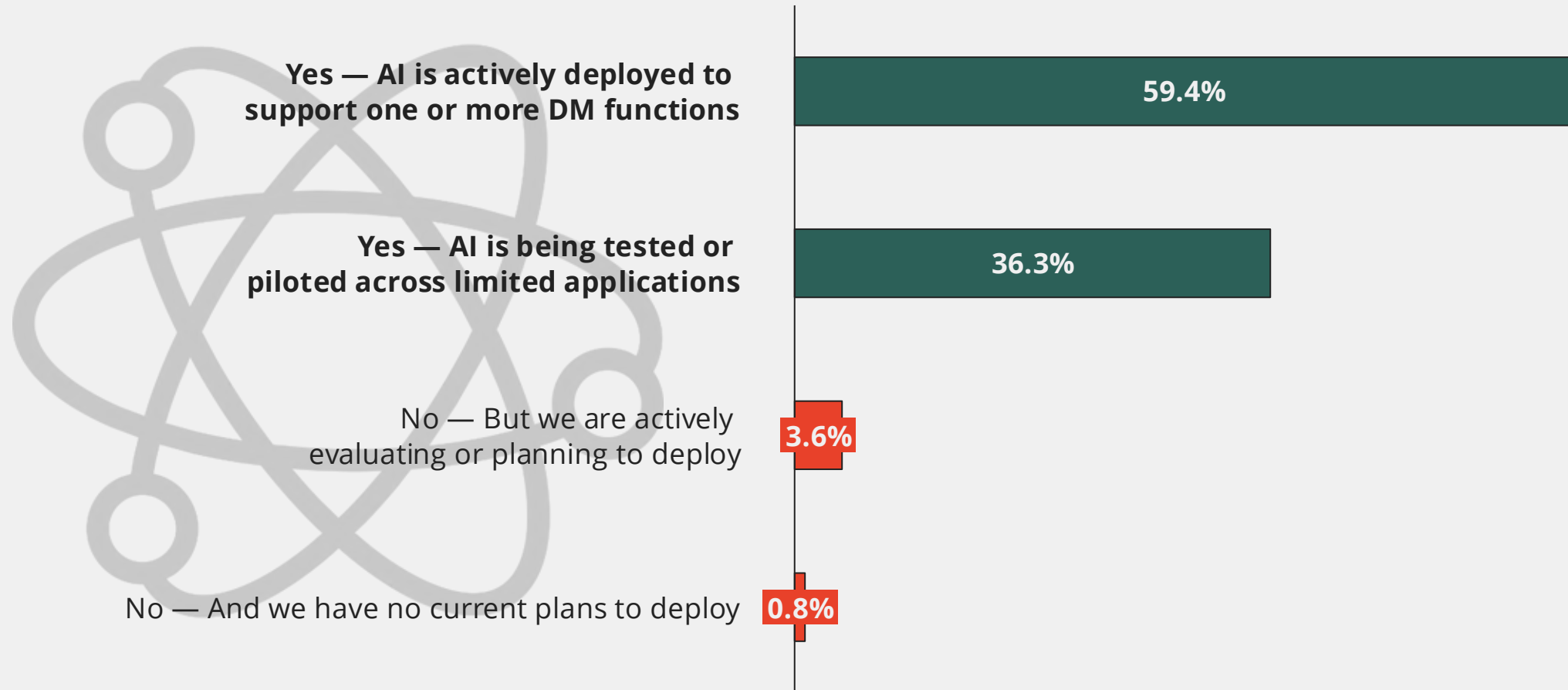
How has AI impacted your organization's performance marketing efforts over the past year?
(% of respondents)



*N=251 (U.S. marketers and media professionals with oversight for direct mail and other advertising/marketing channels)
 Source: Winterberry Group (2026)*

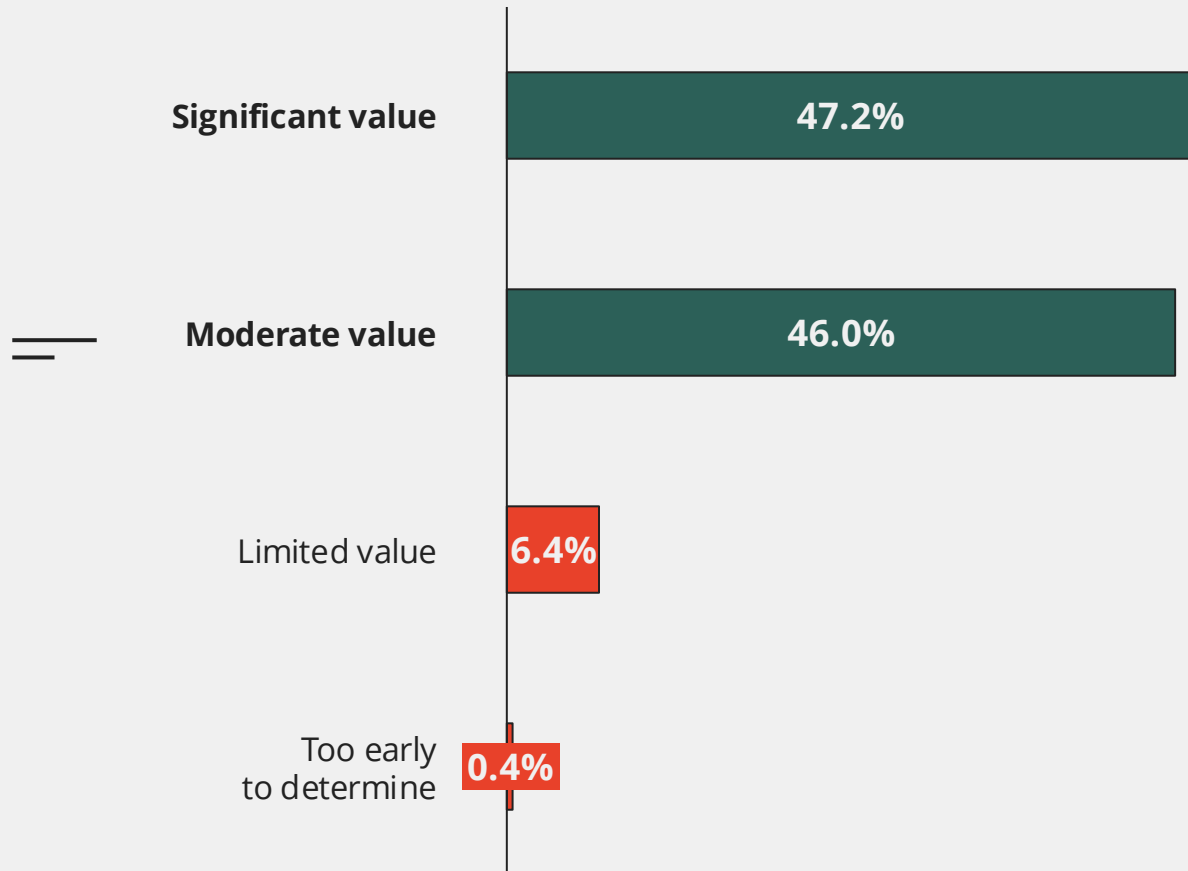
Direct Mail is a Central Part of Strategies Aimed at Putting AI to Work in the Service of Better Marketing Outcomes

Does your organization currently utilize AI, machine learning and/or similar advanced technologies to support its direct mail programs?
(% of respondents)

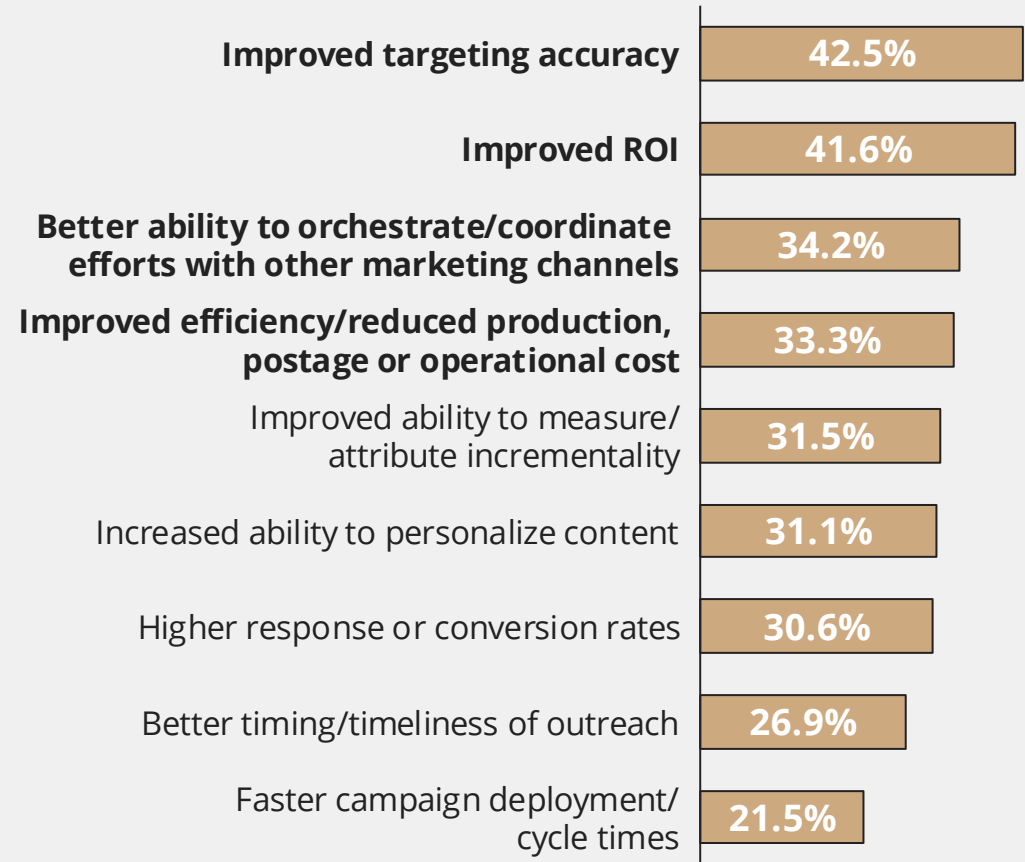


For the First Time, Brands Are Reporting That Those Investments Are Returning Real, Quantifiable Value...

How would you characterize the *incremental value* your organization has realized through its use of AI in support of its DM programs?
(% of respondents)



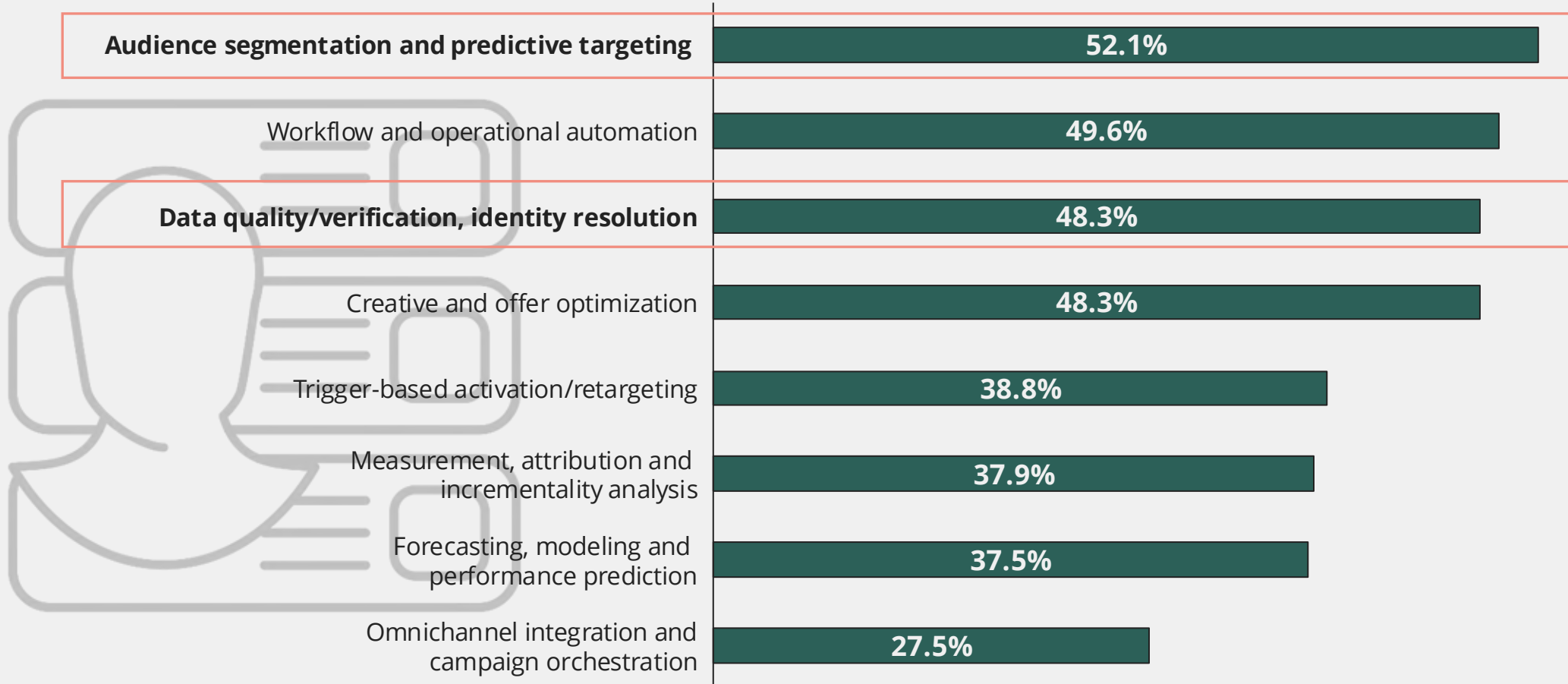
What are the most significant *benefits* your organization has realized from the use of AI in support of its DM programs?
(% of respondents)



N=251 (U.S. marketers and media professionals with oversight for direct mail and other advertising/marketing channels)
Source: Winterberry Group (2026)

... And They're Responding By Expanding The "AI Mandate" to Address a Broader Array of Use Cases

Toward which of the following applications/use cases has your organization utilized AI to support its DM programs?
(% of respondents)



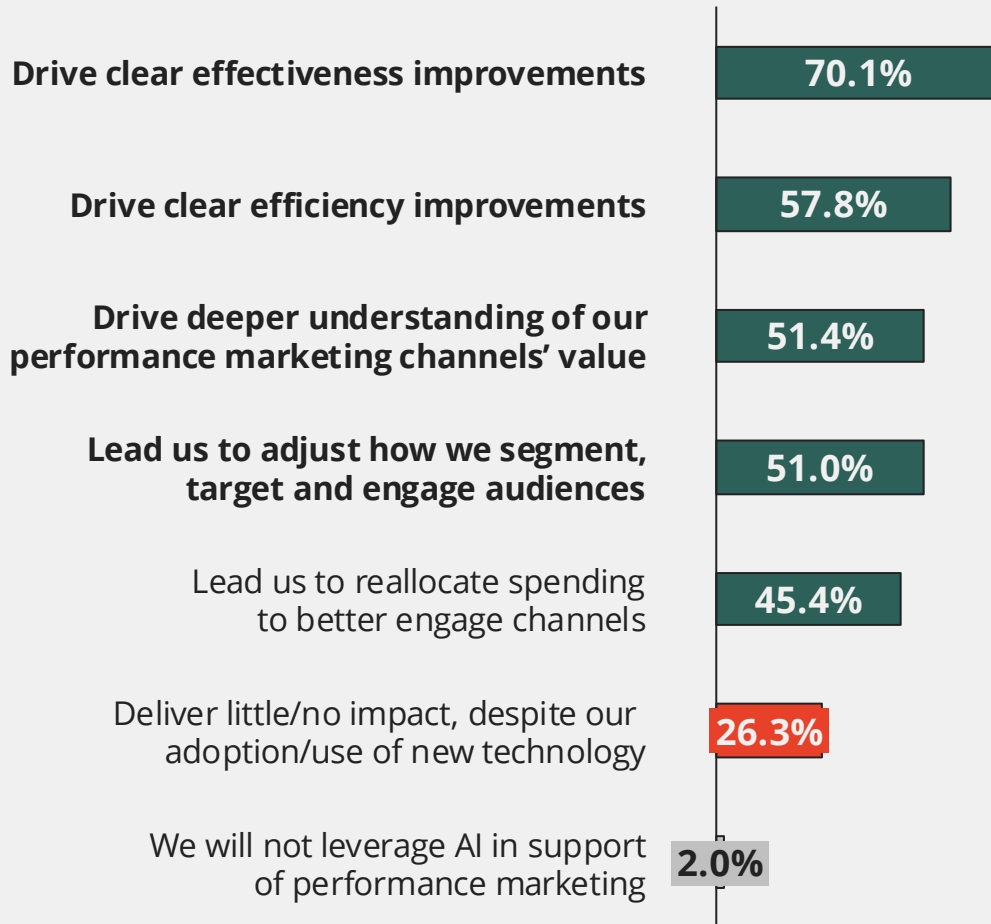
N=251 (U.S. marketers and media professionals with oversight for direct mail and other advertising/marketing channels)
Source: Winterberry Group (2026)

Data + Orchestration = Value

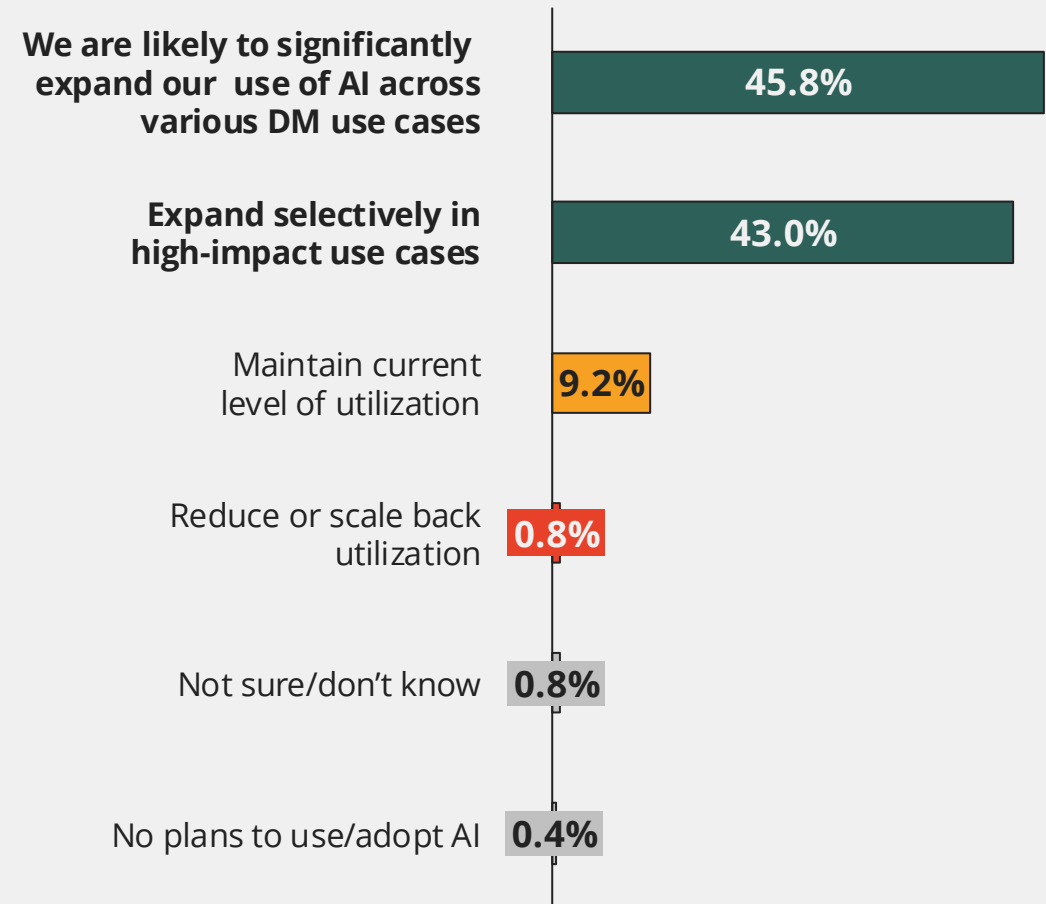


DMers Are Enthusiastic About the Potential for AI to Continue Driving Meaningful Growth, and That's an Important First Step

How do you expect AI to impact your performance marketing efforts over the next two years?
(% of respondents)



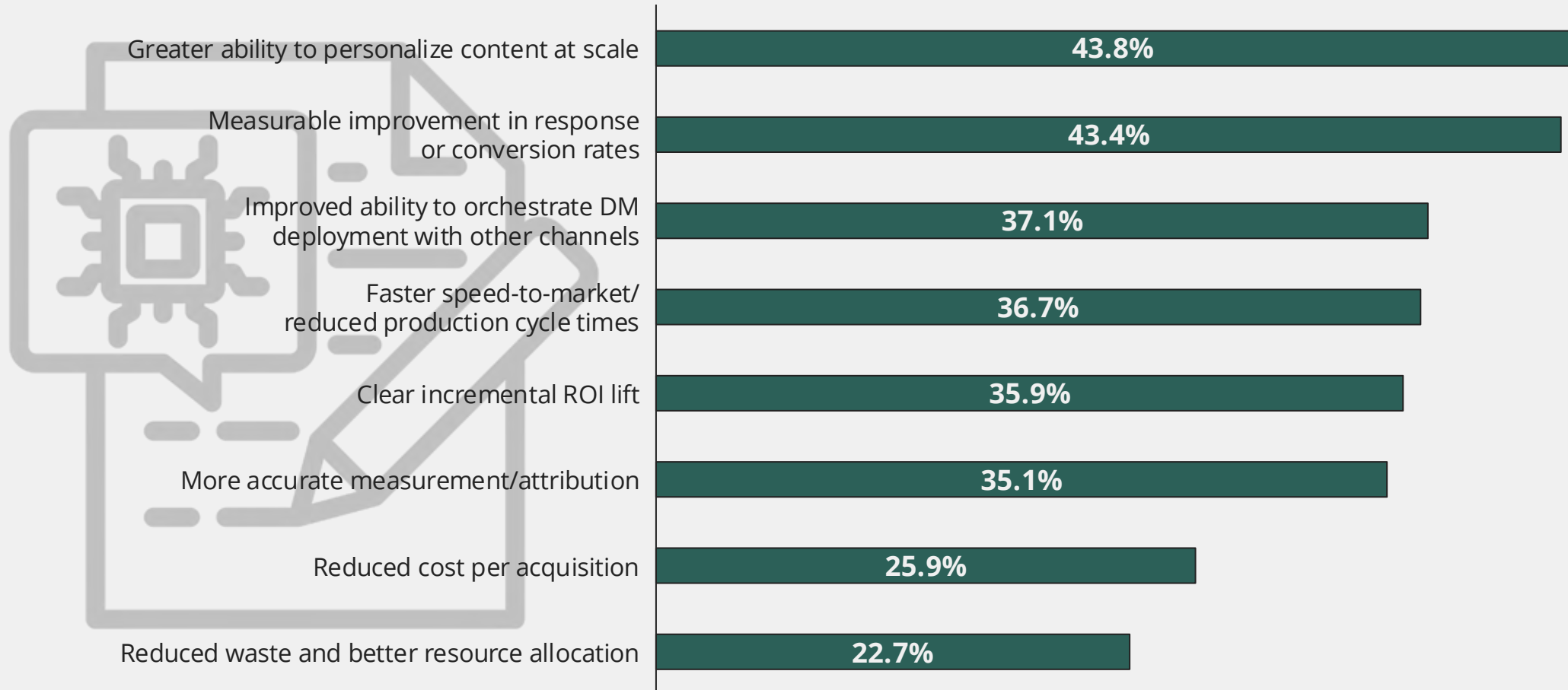
Which of the following best reflects your organization's priorities (with respect to the use of AI in support of DM) over the next three years?
(% of respondents)



N=251 (U.S. marketers and media professionals with oversight for direct mail and other advertising/marketing channels)
Source: Winterberry Group (2026)

But the To-Do List Associated with AI Deployment is Long

Which of the following outcomes would you associate with “best case” application of AI in support of your organization’s future DM programs?
 (% of respondents)




N=251 (U.S. marketers and media professionals with oversight for direct mail and other advertising/marketing channels)
 Source: Winterberry Group (2026)


The AI Maturity Curve Has Taken Definitive Shape, and Many in Our Industry Are Making Progress Climbing It



Gen 1 (2021+):
Workflow



Gen 2 (2023+):
Content/Creative
Optimization



*“We need a lot: **better data integration across channels** so we can stop managing direct mail and digital in separate silos... **AI tools to generate creative variations** automatically would save a ton of time... better attribution to actually know what's working across all channels.*

Right now we're spending, but not sure what's driving the results”

— C-Level Executive, Insurance

The AI Maturity Curve Has Taken Definitive Shape, and Many in Our Industry Are Making Progress Climbing It

*“We **aggregate, cleanse and deduplicate online and offline data** in real time to create a unified dataset, **providing high-quality predictive data for AI models** to help us achieve personalized targeting and cross-channel consistency”*

— EVP/SVP, B2B Technology

Gen 1 (2021+):
Workflow



Gen 2 (2023+):
Content/Creative
Optimization



Gen 3 (2024+):
List Segmentation



Gen 3 (2025+):
Predictive Analytics



The AI Maturity Curve Has Taken Definitive Shape, and Many in Our Industry Are Making Progress Climbing It

*“We [need] a **centralized data orchestration platform** that can bridge the gap between our legacy systems and modern AI marketing tools... We need **enhanced human-in-the-loop compliance frameworks** to automate the legal review of AI-generated personalized offers”*

— Director, Financial Services

Gen 1 (2021+):
Workflow



Gen 2 (2023+):
Content/Creative
Optimization



Gen 3 (2024+):
List Segmentation



Gen 3 (2025+):
Predictive Analytics



Gen 4 (????+):
Orchestration &
Attribution-Driven
Optimization



How to Capitalize on Disruption?



Brands/Marketers: How Do Your Marketing Objectives Help Support Your Business Aims?



What **business goals** (and/or transformation efforts) is the marketing team being tasked with supporting?



How do those objectives map to **tangible marketing use cases**? How would you prioritize them for near-, medium- and long-term investment?



Which use cases are you well positioned to support with existing internal tools/expertise? Where may you need **external support**?



How well do your internal, supplier systems support true **omnichannel attribution**?

Marketing/Mail Service Providers: How Do Your Core Competencies Help Drive Lasting Competitive Differentiation?



What are your core capabilities, expertise and/or assets that constitute your **platform for growth**?



How well positioned are you to capitalize on **unique/defensible expertise, technology and/or data**?



Where can you focus/narrow your efforts to show functional, vertical or other clear **specialization**?



Where might you need to pursue buy, build or partner initiatives to drive needed agility, support delivery of **true client-focused solutions**?

Delivering Performance 2026: Coming Soon; Reach Out to Learn More



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Contact:
jmargulies@winterberrygroup.com

