

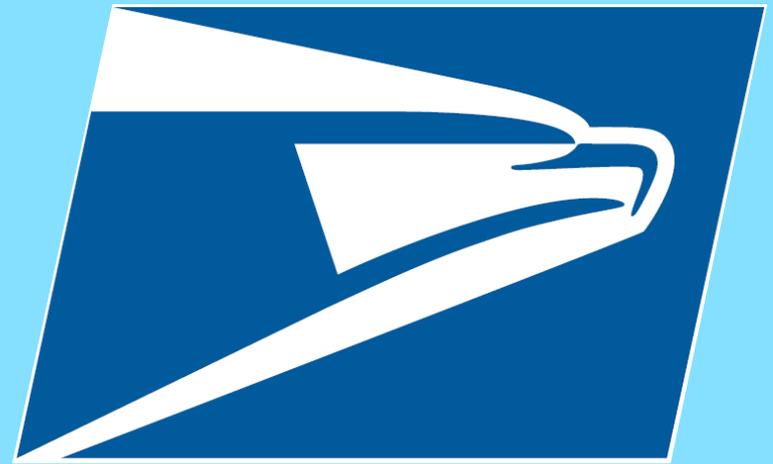


USPS Customer & Market Insights

USPS Mail Moments

Fall 2018 Review

Conducted by Summit Research





Methodology

An online survey was conducted as a part of an ongoing tracking effort to understand mail behavior, overall mail habits, and bill payment activities.

- Fielded October 2-8, 2018 by Summit Research
- Consumers were randomly assigned to complete one section of the survey: mail moments or bill payment
- Base size=2541 consumers (Mail moments=1271, Billing=1270)
- Participant requirements:
 - Ages 18-75
 - Male or female head of household
 - Involved with mail sorting, making shopping lists/grocery shopping, and/or bill management
 - Age, ethnicity, HH income, and region matched to census data. Female skew for gender
- Generations defined to align with Pew Research Center definitions:

Generation	Year of Birth
Millennials	1981-1996
Gen X	1965-1980
Boomers	1946-1964



Executive Summary

Mail Engagement: Excitement about mail remains consistent

- Most consumers still get their mail at the first opportunity (82%)
- Millennials are more likely to visit the USPS website and use the USPS mobile app, but least likely to talk to a postal carrier or visit a Post Office location.
- Packages are typically considered more important than mail– especially to Millennials
- Informed delivery usage increases attention to mail for half of users

Sorting Mail: Consumers spend an average of 4.1 minutes sorting and 7.4 minutes reading & opening their mail

- Millennials spend the most time sorting and opening/reading their mail, while Boomers spend the least
- The kitchen and living room are the most popular home locations for sorting and opening/reading mail



Executive Summary (cont.)

Ad Mail: Retail advertising mail pieces are relevant to consumers, with most taking the time to read through them instead of discarding without reading

- Over half of consumers received ad mail from retailers and flyers/circulars from local stores in their last mail bundle
- Bills/statements, letters from friends/relatives, and greeting cards are especially engaging and relevant as these types of mail pieces are more likely to be open/read and kept
- Millennials are most likely to bring ad mail into retail stores or use as a prompt to shop online
- 50% of consumers have tried a new product/service/establishment in the past 6 months after receiving ad mail. Millennials are most likely to have done so in the past month

Bill Management: Households are paying more bills than before (current average 9.9 vs 9.5 in Spring). Millennials receive more bills than older consumers (12.2 average)

- The number of bills received has increased from the Spring, driven by an increase in the number of utilities, credit card, insurance, and rent/mortgage bills
- Over half of bills arrive by mail, a decrease from Spring numbers. Medical bills are much more likely to arrive by mail than other bill types, followed by utilities and rent/mortgage





Mail Moments

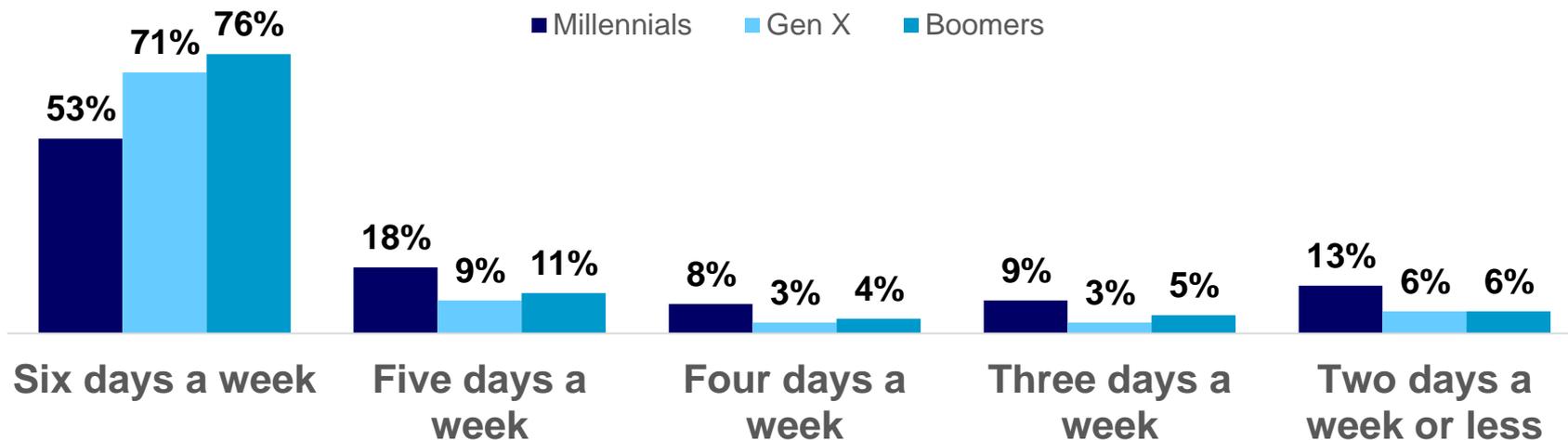


Mail Collection Behaviors

Over two-thirds of customers collect their mail every delivery day. Millennials are least likely to check their mail everyday

Frequency of Collecting Mail from Mailbox

6 Days a Week	5 Days a Week	4 Days a Week	3 Days a Week	2 Days a Week	1 Day a Week	<1 Day a Week
68%	12%	6%	6%	3%	3%	2%



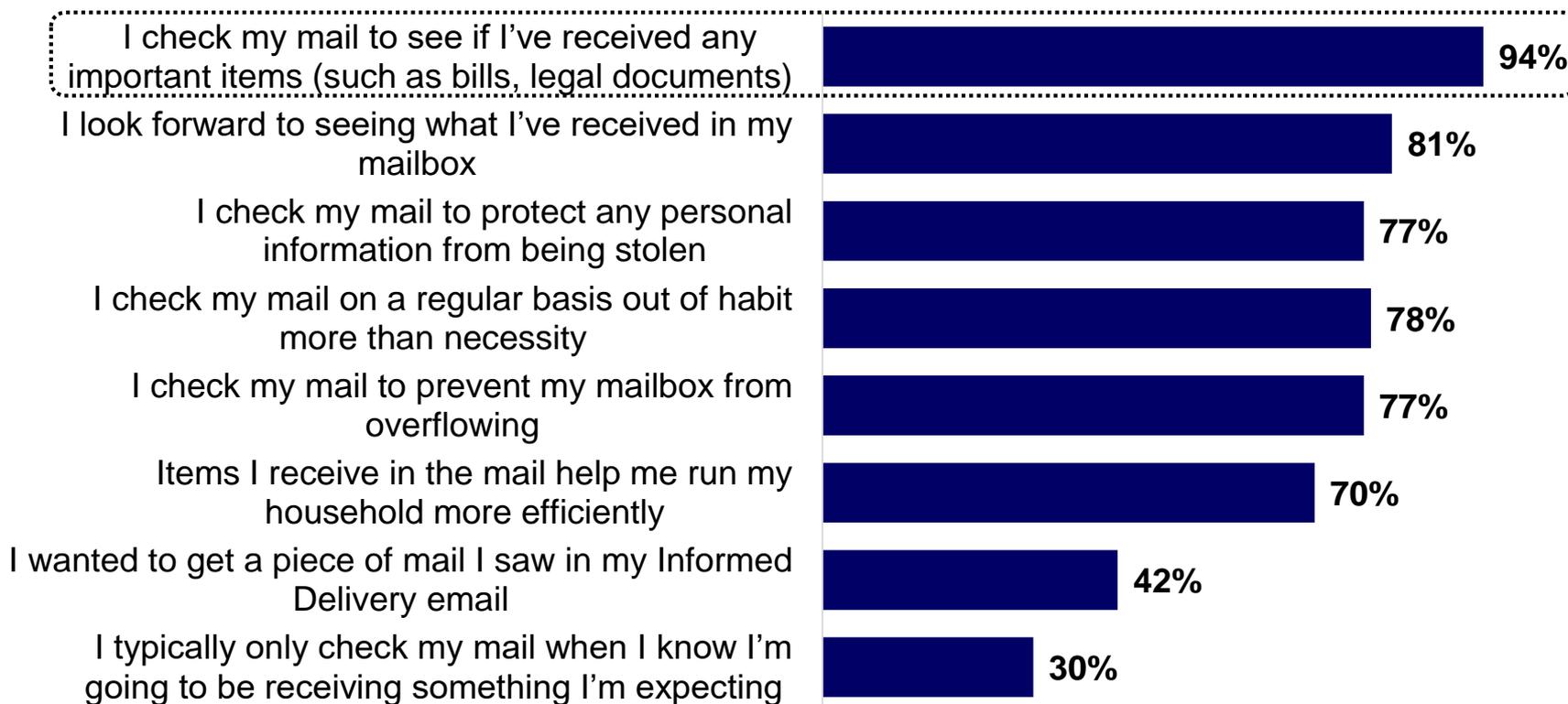
A4. Approximately how often does someone in your household collect mail that has been delivered to your mailbox? Base size: 1271, Millennials=351, Gen X=350, Boomers=524



Mail Collection Drivers

The key driver for collecting mail is to see if any important items have been received

Why Check Mail (Top 2 Box: Agree Completely/very much)





Mail Collection Drivers

Seeing if any important items have been received remains the key driver for collecting mail. Other drivers remain consistent, although fewer agree that they typically only check their mail when they know they're going to be receiving an expected item

Why Check Mail (Top 2 Box: Agree Completely/very much)

■ Spring 2018 ■ Fall 2018



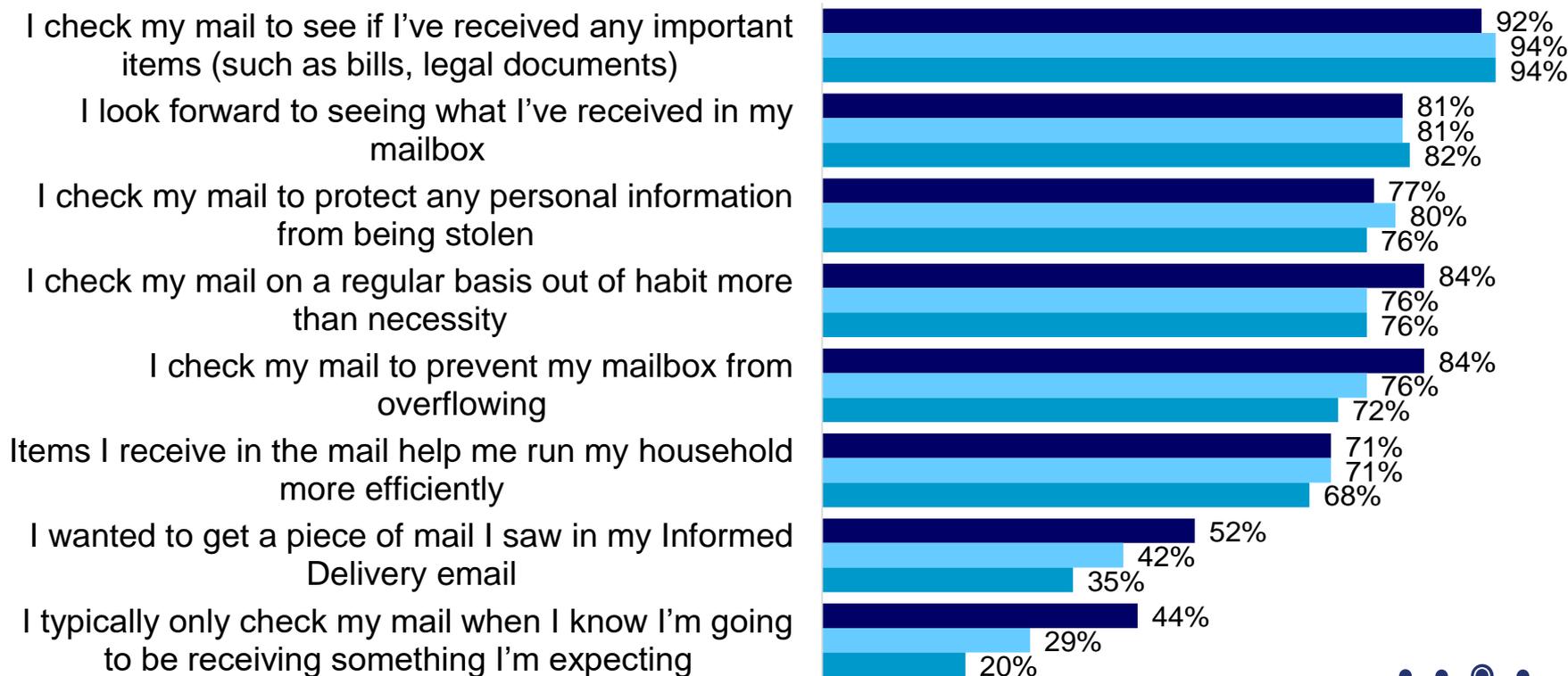


Mail Collection Drivers

Most collection drivers don't change across generations. However, Millennials are slightly more likely than others to check their mail out of habit, to prevent overflow, when they are expecting something, and if they saw something on their Informed Delivery email

Why Check Mail (Top 2 Box: Agree Completely/very much)

■ Millennials ■ Gen X ■ Boomers





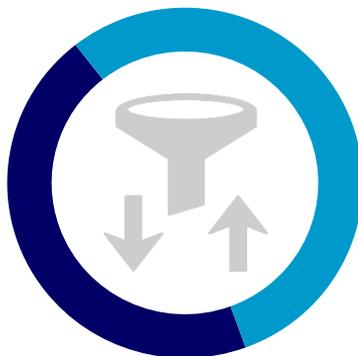
Definition of Sorting Mail

There is a fairly even split on how consumers define mail sorting. Older consumers are the most likely to define it as including opening/reviewing

How Consumers Define Mail Sorting

45%
Checking mailbox
and quickly
categorizing which
pieces

Millennials=48%
Gen X=47%
Boomers=42%



55%
Opening, reading
and reviewing all
mail pieces

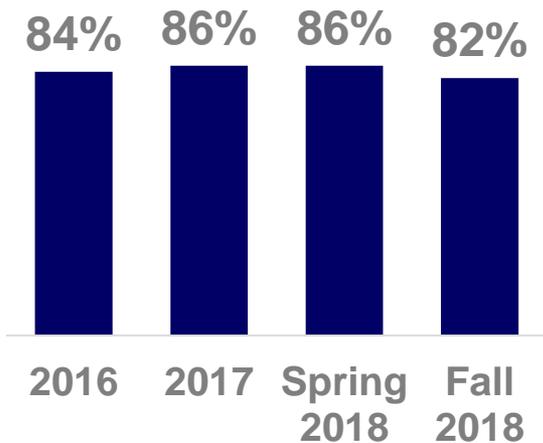
Millennials=52%
Gen X=53%
Boomers=58%



Mail Sorting Behaviors: First Opportunity

Most consumers continue to pick up and sort their mail at the first opportunity. In Fall 2018, Boomers are driving a slight decrease in mail sorting behaviors

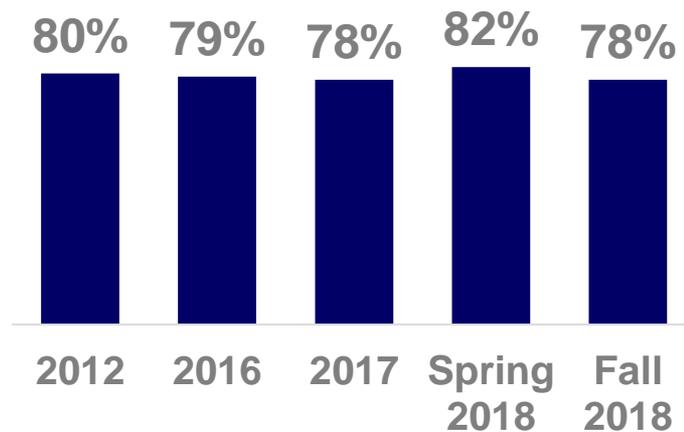
Picked Up Mail at First Opportunity



Fall 2018 Millennials: 83% Gen X: 84% Boomers: 80%

Spring 2018 Millennials: 89% Gen X: 86% Boomers: 86%

Sorted Last Mail Delivery At First Opportunity



Fall 2018 Millennials: 76% Gen X: 78% Boomers: 81%

Spring 2018 Millennials: 78% Gen X: 81% Boomers: 87%

A8. The last time you picked up the mail, did you pick it up at your first opportunity (e.g., when you got home from work, as soon as the mail was delivered, etc.)? Base size: 1189
A10. Did you sort the mail at the first opportunity you had, or did you not get to sorting the mail until later? Base size: 1271, Millennials=351, Gen X=350, Boomers=524

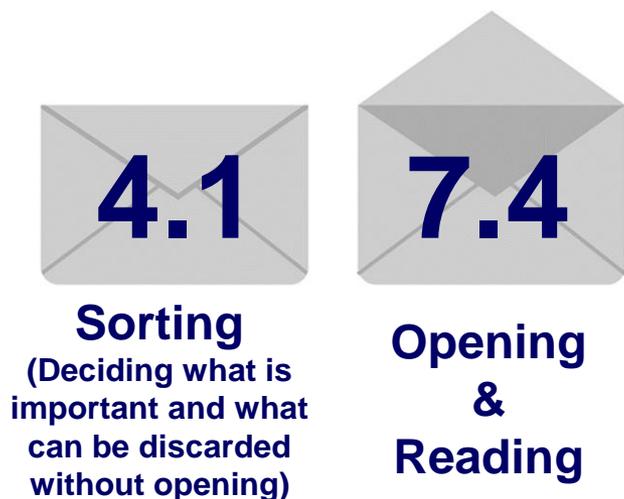


Mail Sorting Behaviors

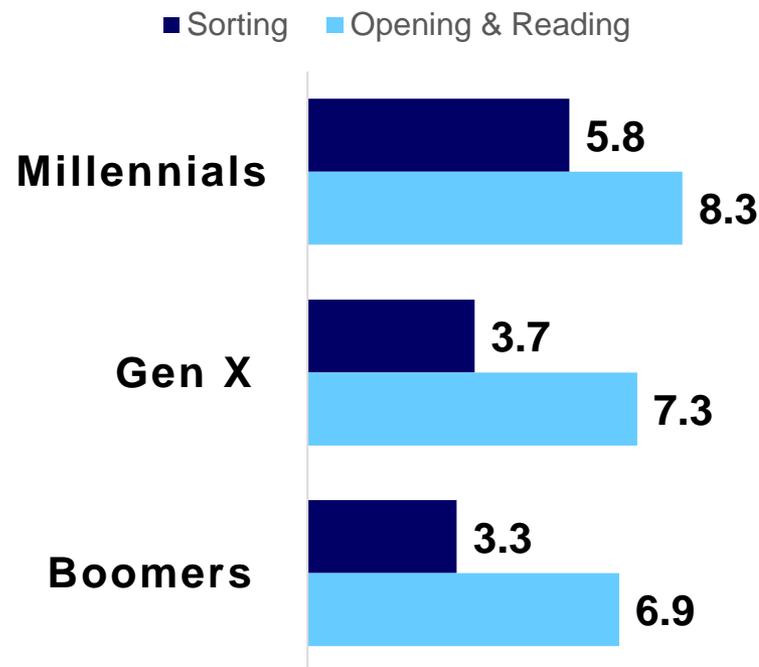
Millennials spend the most time both sorting and opening/reading their mail

Average Time Spent Sorting Mail (in minutes)

Total



By Generation



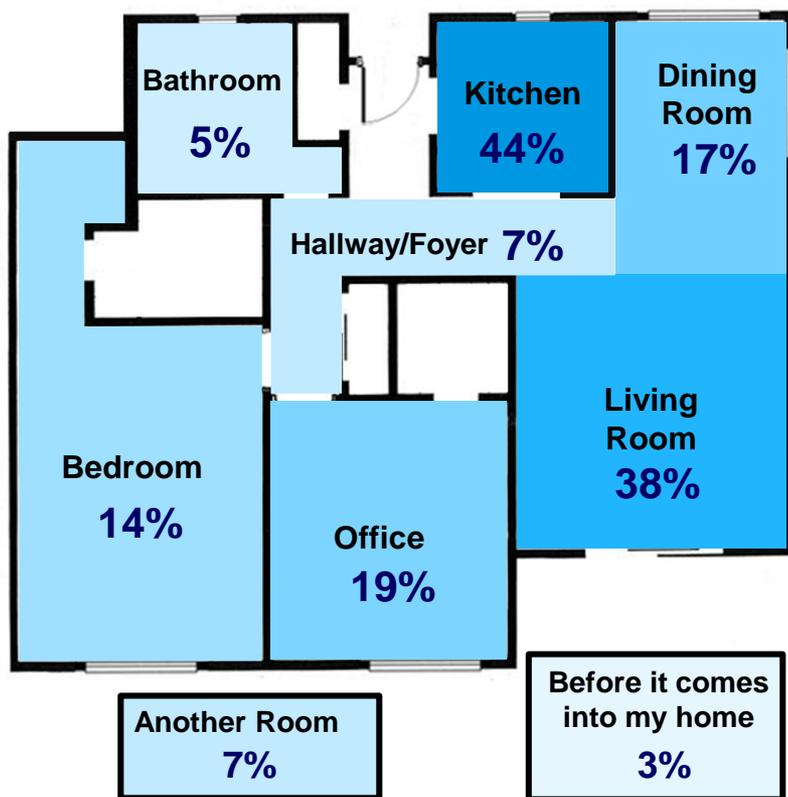


Mail Sorting Location

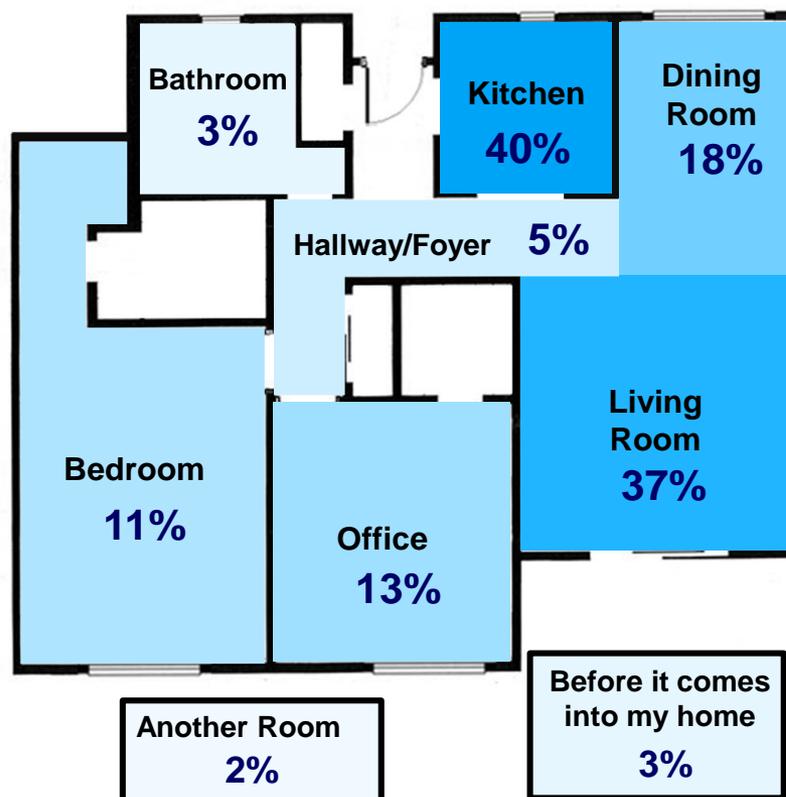
The kitchen and living room continue to be locations mail is most commonly sorted

Mail Sorting Location

(Deciding what mail is important and what can be discarded without opening)



Opening & Reading Mail Location

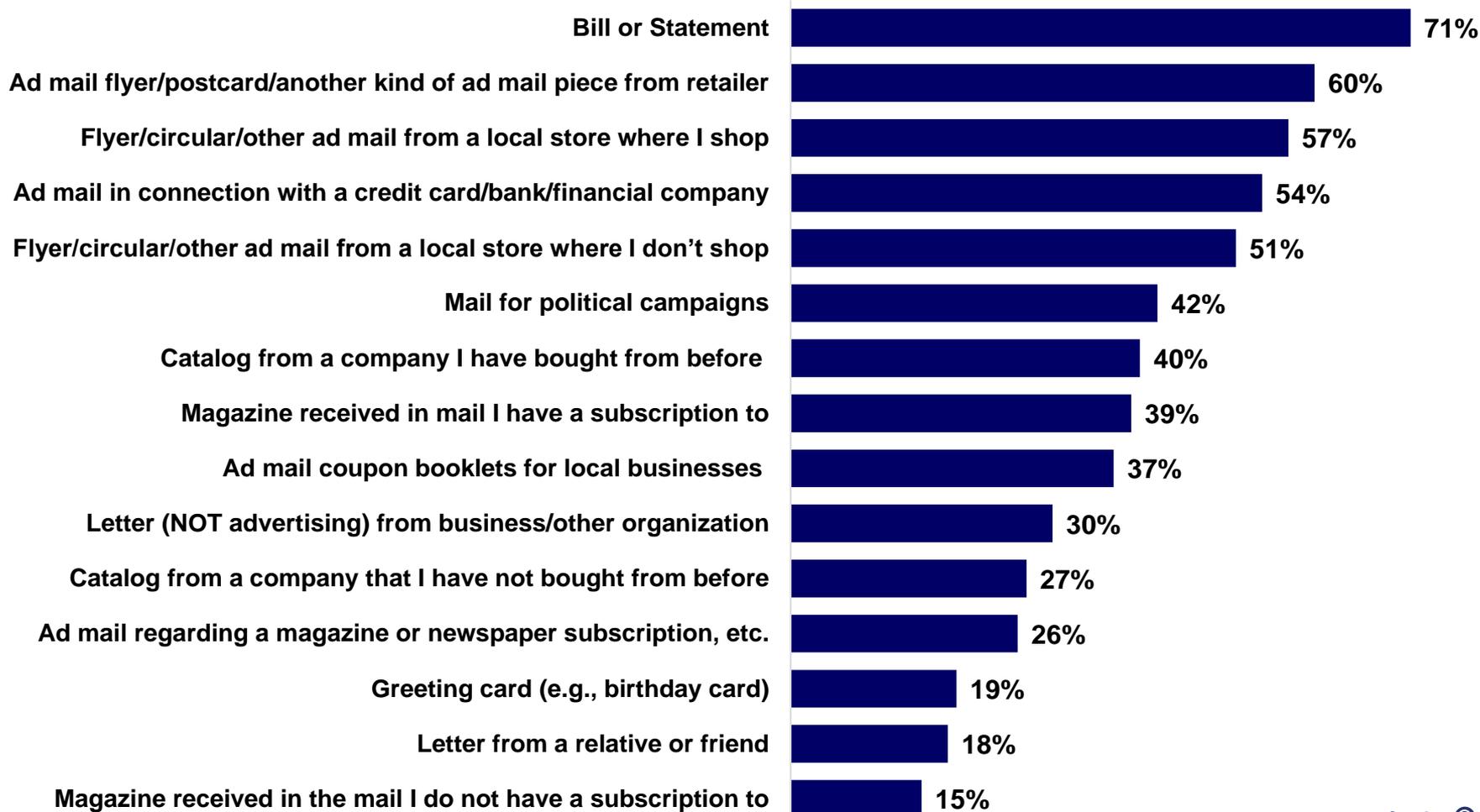




Mail Types Received

In their last mail bundle, over half of consumers received a bill/statement, ad mail from retailers, local stores, and financial institutions

Mail Types Received in Last Bundle





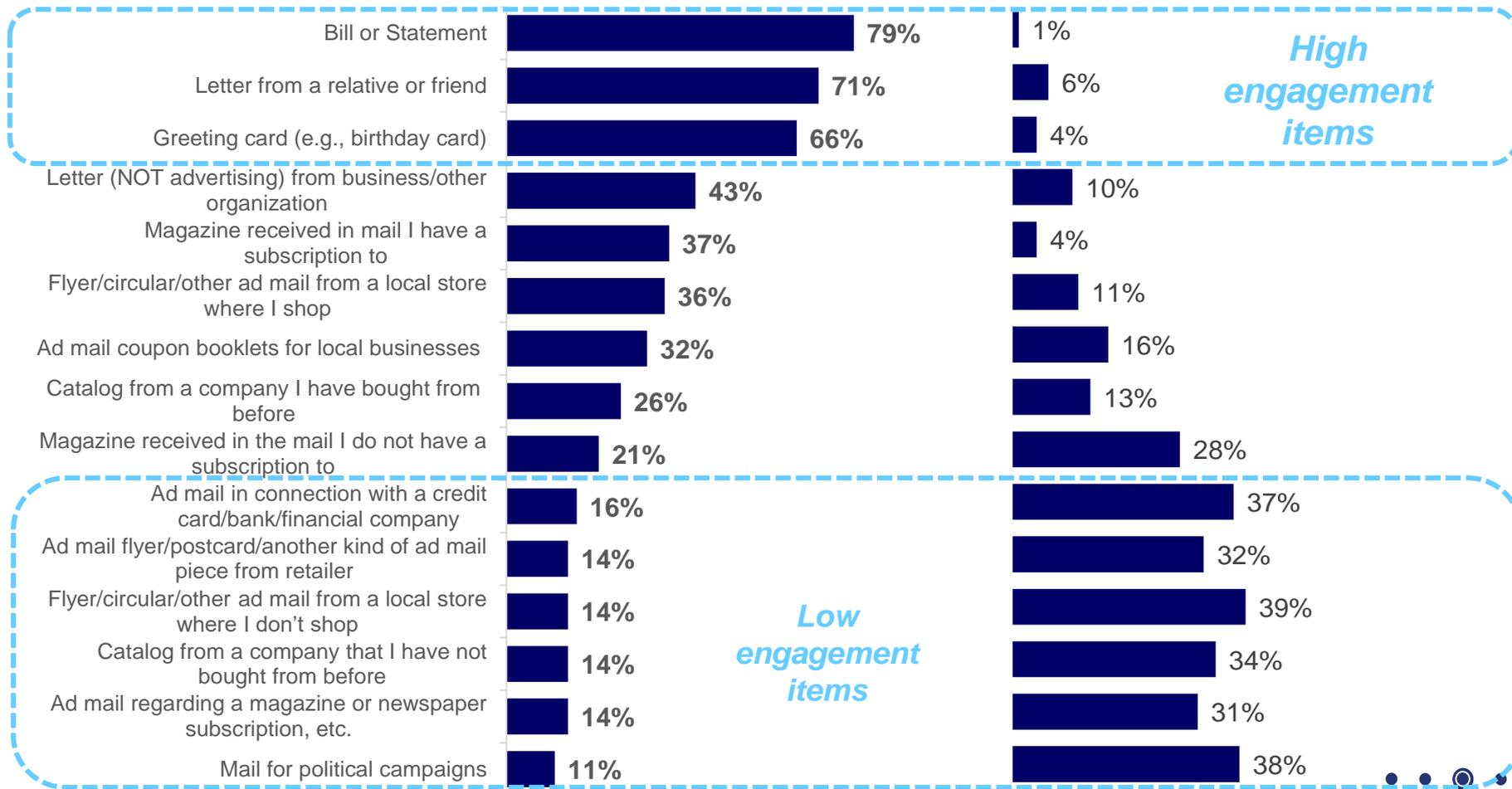
Mail Types Received

Bills/statements, letters, and greeting cards are the most engaging mail types

Actions Taken With Mail Types in Last Bundle

Open/Read and Keep

Discard Without Reading



High engagement items

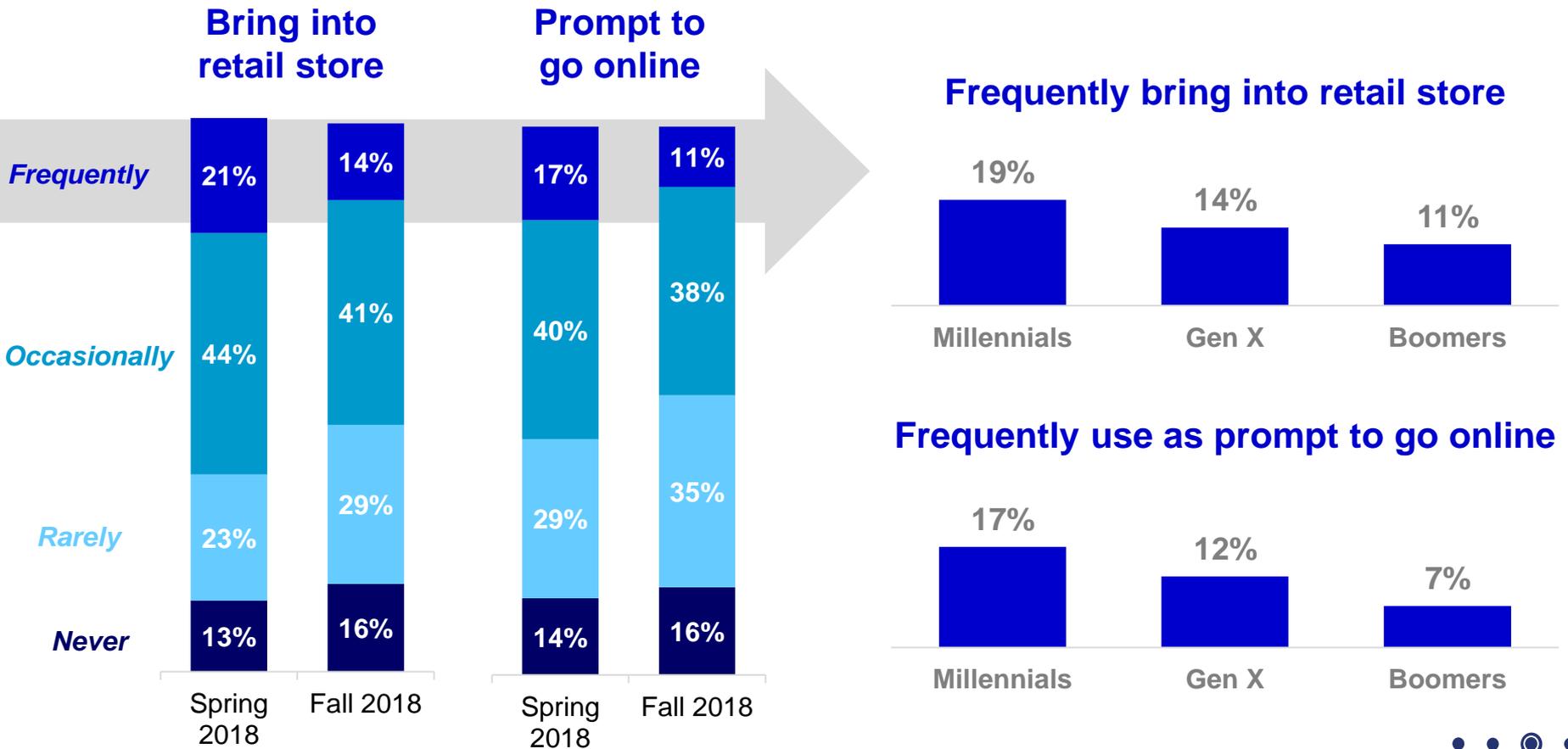
Low engagement items

Ad Mail Actions



Fewer consumers regularly bring ad mail into a retail store or use as a prompt to shop online than in the Spring. Millennials are most likely to take both of these actions with ad mail

Frequency of Actions



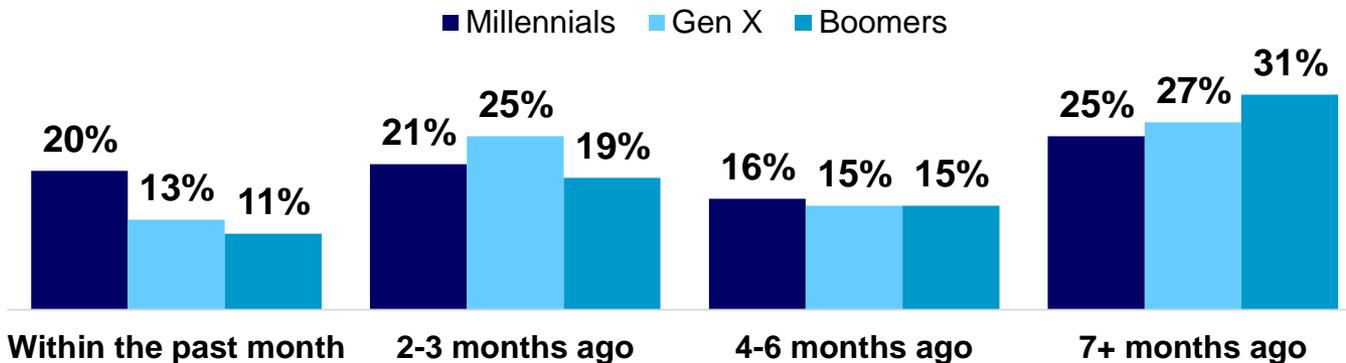
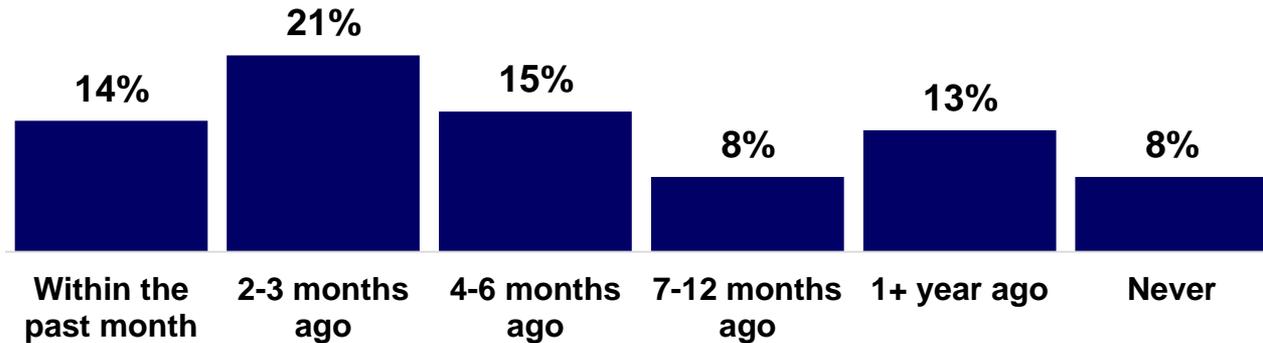
A17. How often do you take the following actions with advertising mail pieces (flyers, catalogs, coupons) you receive? Base size: Spring 2018=1309, Fall 2018=1271, Millennials=351, Gen X=350, Boomers=524

Ad Mail Effectiveness



50% of consumers have tried a new product/service/establishment in the past 6 months after receiving ad mail. Millennials are most likely to have done so in the past month

Last Time Tried New Product/Service/Establishment After Receiving Ad in Mail



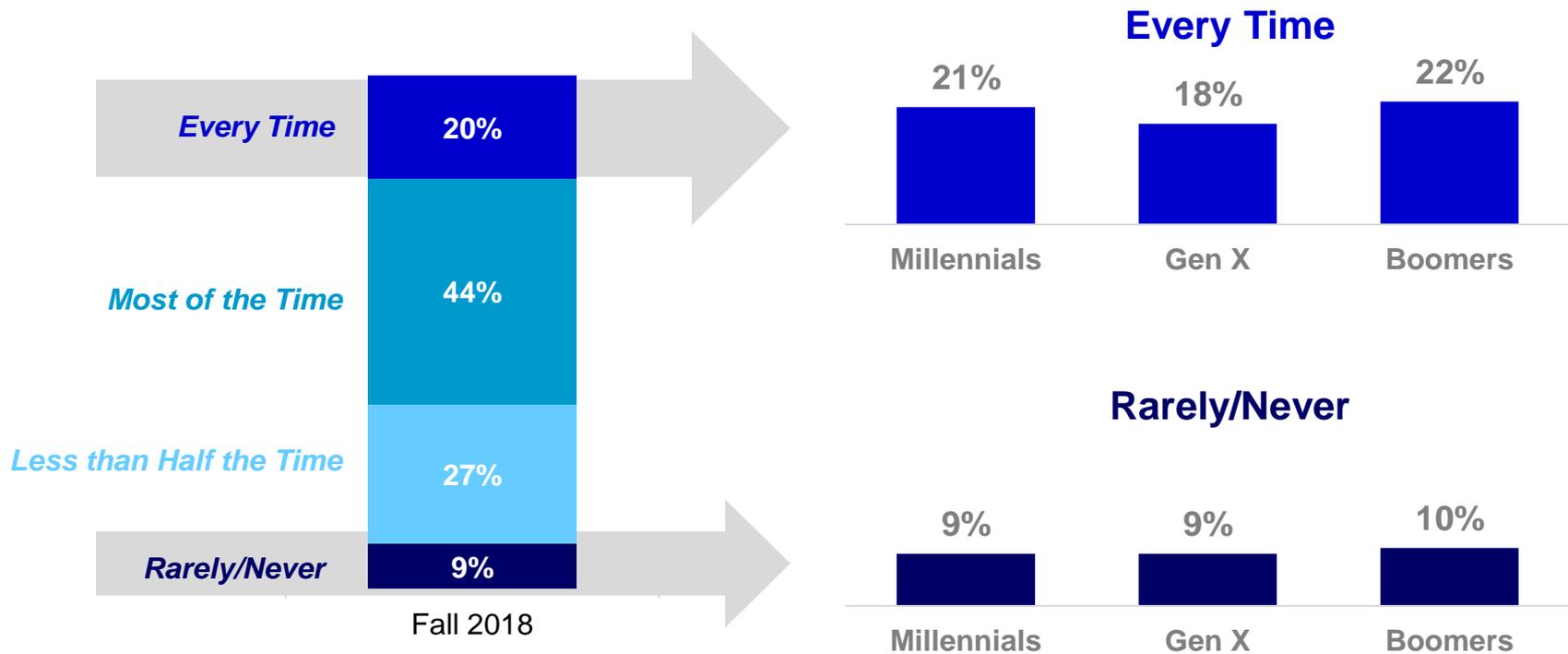
A17C. When was the last time you tried a new product, service, or establishment after receiving an advertisement in the mail from the company? Base size: Total 1271, Millennials=351, Gen X=350, Boomers=524

Coupon Booklets



20% of consumers read through coupon booklets every time they receive one. No significant differences are seen among age groups

Read Through Coupon Booklets



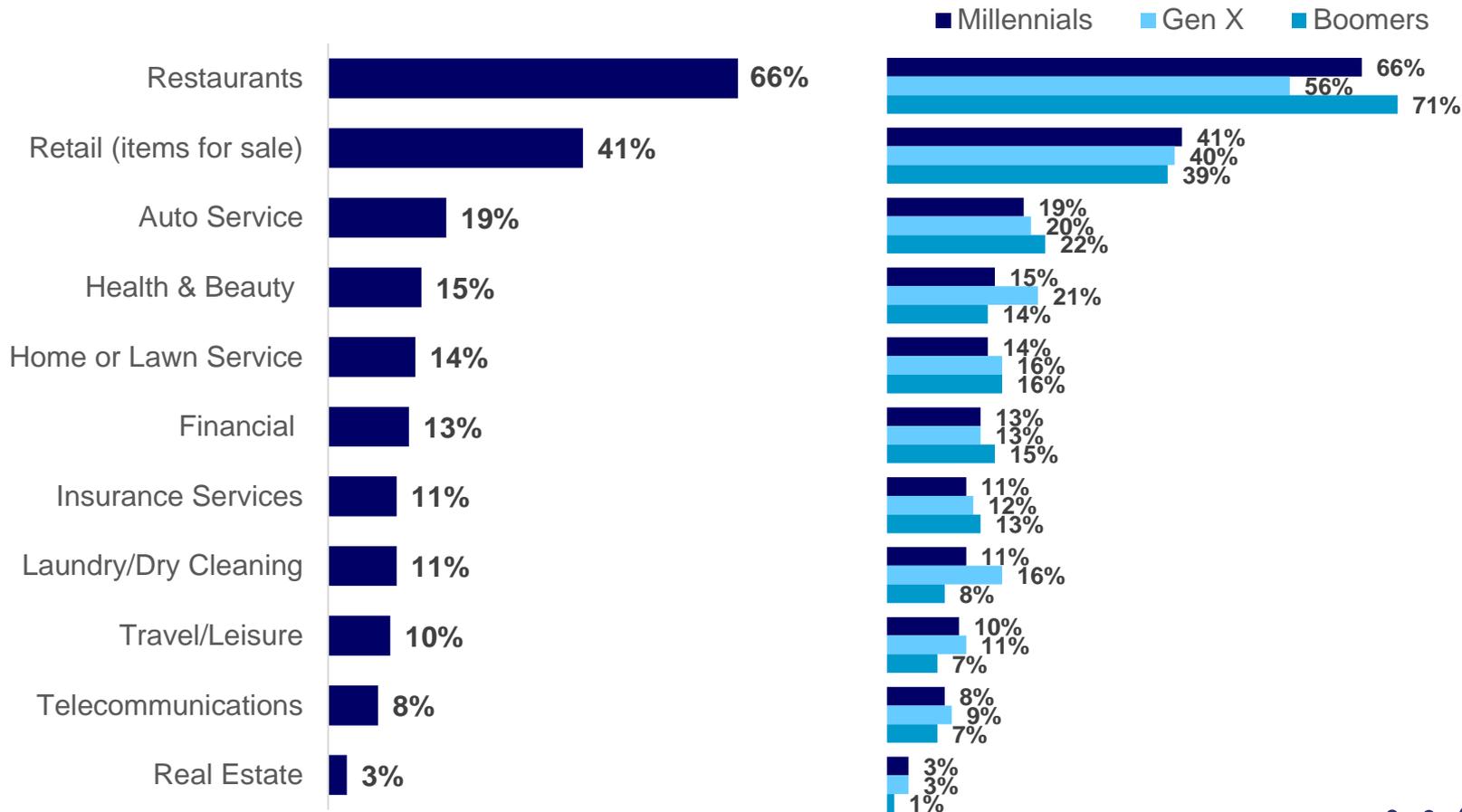
A17B. When you receive advertising flyers or coupon booklets, how often do you read/browse through the entire booklet? Base size:1271 total, Millennials=351, Gen X=350, Boomers=524



Ad Mail Effectiveness

Restaurants are the most commonly tried new business after receiving ad mail, with Millennials and Boomers driving the trial. Retail is second most common

New Product/Service/Establishment Tried in Past Year After Receiving Ad in Mail

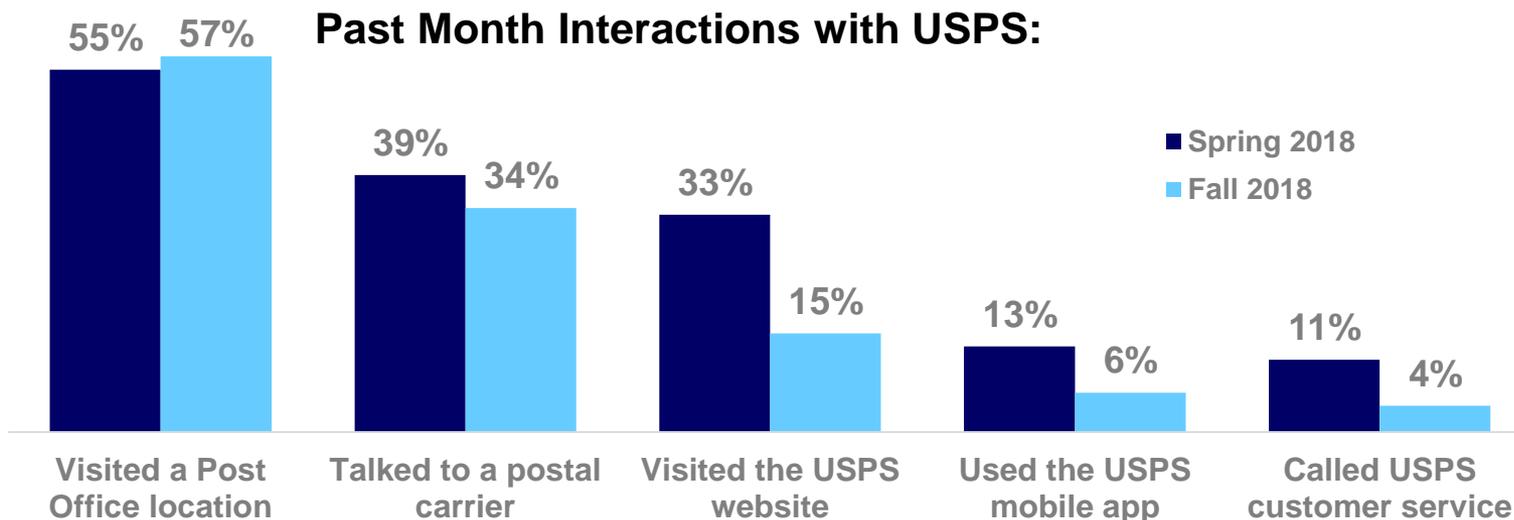


A17C_2. In the past year, what new products, services, or establishments have you tried after receiving an advertisement in the mail? Base size:738 total, Millennials=222, Gen X=212, Boomers=280



USPS Interaction

Over half of postal customers visited a PO in the past month. Website usage, mobile app usage, and customer service contact were higher in the Spring



Millennials:

51%

26%

24%

11%

7%

Gen X:

57%

35%

16%

7%

5%

Boomers:

63%

41%

8%

2%

1%



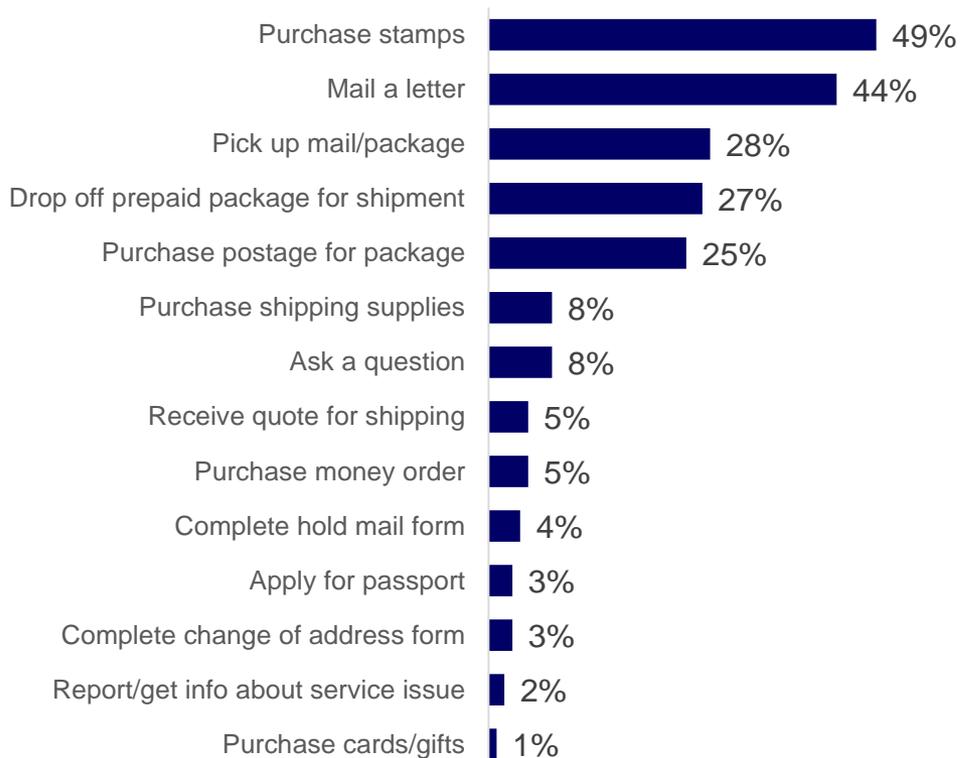
USPS Interaction Drivers

Purchasing stamps and mailing letters are the most common drivers to visit a Post Office location. Most consumers who talked with their postal carrier did so as a friendly greeting

Drivers for Past Month Interactions



Visited a Post Office Location



Talked to Postal Carrier

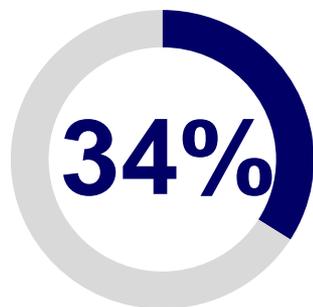




Informed Delivery Awareness & Usage

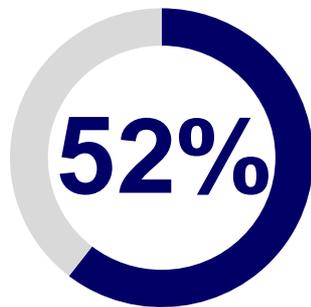
One-third of consumers are aware of Informed Delivery, and half of those aware claim to have signed up for notifications (18% of total population). Two-thirds of claimed users know the name of the service

Awareness of Mail Notification Service



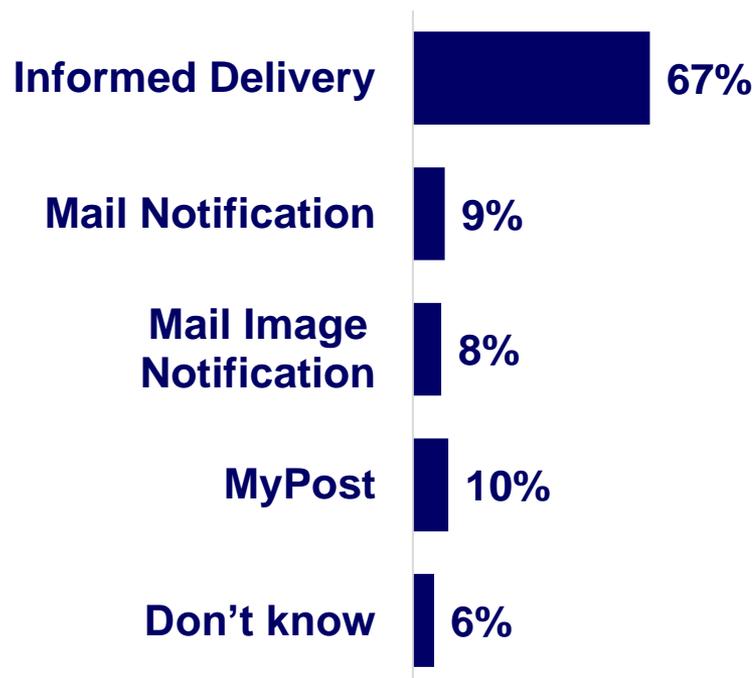
Of consumers are aware of this USPS service offering

Have Signed Up as User (Base: aware of ID)



Of those aware claim to have signed up for mail notification service (18% of total pop)

Name of Service (Base: claimed users of ID)



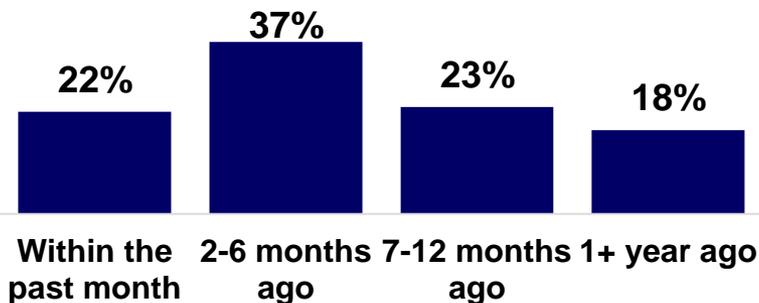
A20. Have you ever heard of a service offered by the United States Postal Service that provides a daily scanned image, via email or a dashboard, of the outside of the letter-sized mail pieces and a notification of the packages that are scheduled to be delivered to your residence later that day? Base: 1271 A21. Have you signed up to use this feature? Base: 433 A22. What is the name of this feature? Base: 227 [New questions](#)



Informed Delivery Users

Over half of Informed Delivery users signed up within the past 6 months. ID is used an average of 4 times per week and over half of users claim to have increased attention to mail because of ID usage. Email is the most common notification method

Signed Up for Informed Delivery...

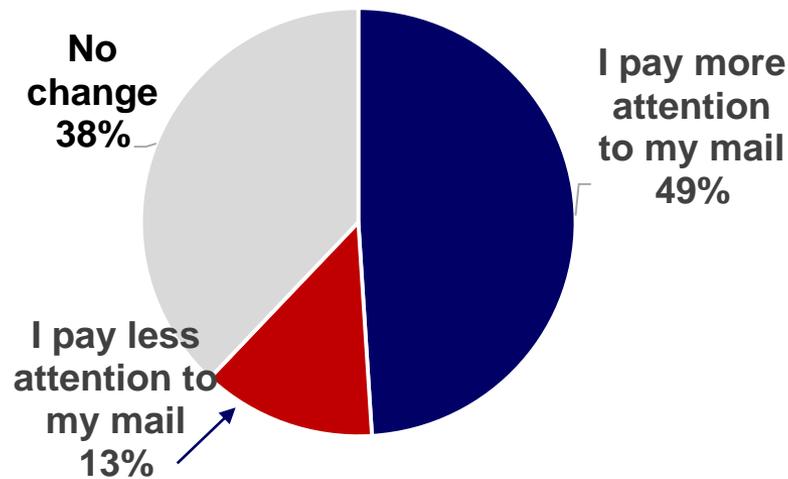


Informed Delivery Usage Frequency

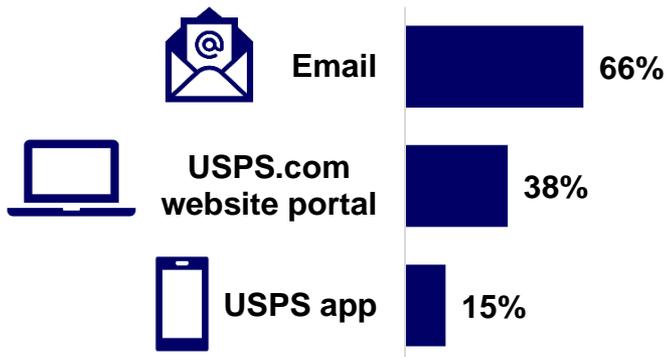
3.8

 Times per week (mean)

Impact on Attention to Mail After Previewing



Notification Methods Used



A23. How long ago did you sign up for the Informed Delivery feature? A24. Which of the following methods do you use to preview your mail and packages with Informed Delivery? A25. How often do you preview your mail and packages through Informed Delivery? A26. Do you find you pay more or less attention to the mail you receive after previewing your mail with Informed Delivery? Base size: 213



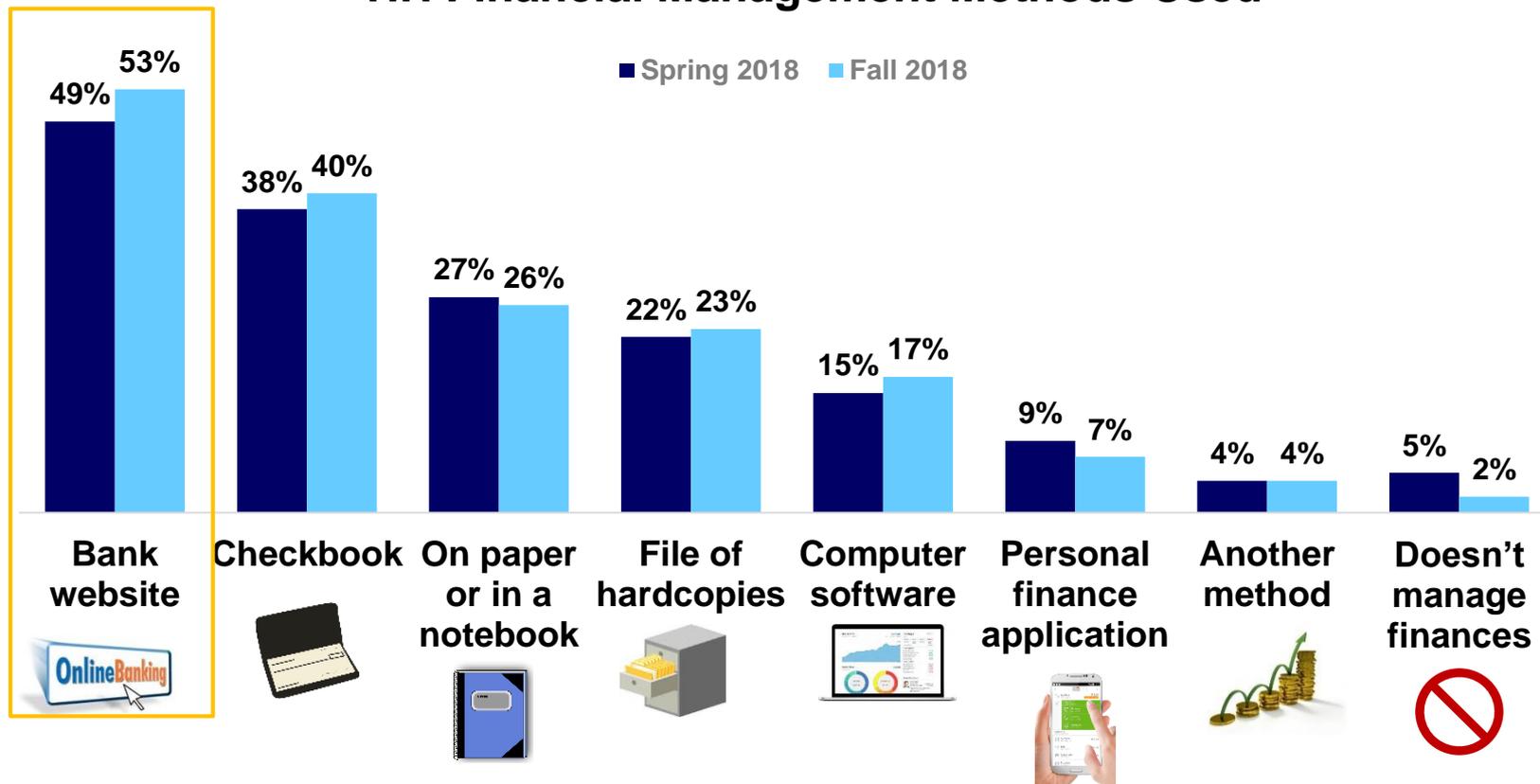
Bill Management



Household Financial Management

Bank websites and checkbooks are the most common ways to manage household finances, with over half of consumers using bank websites

HH Financial Management Methods Used

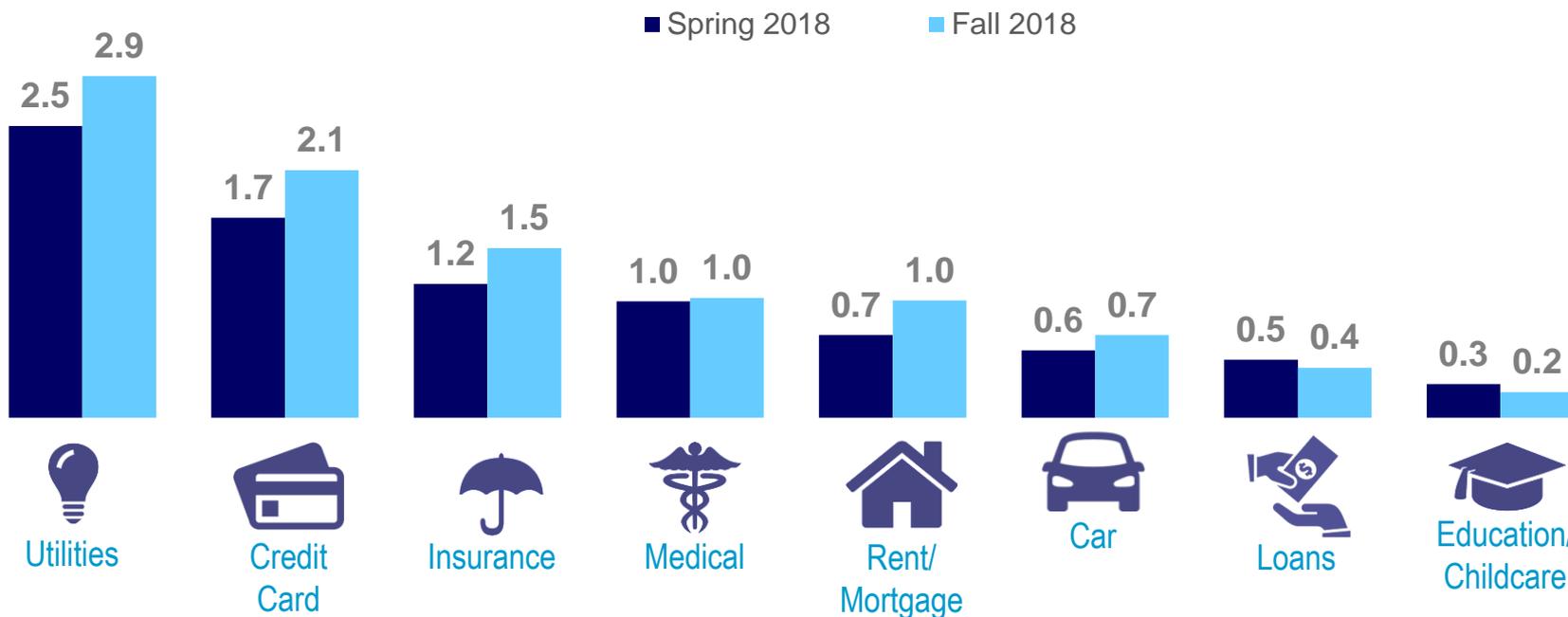




Household Bills

The number of bills received has increased from the Spring, driven by an increase in the number of utilities, credit card, insurance, and rent/mortgage bills

Bills Received in Past Month (average number received online + by mail)



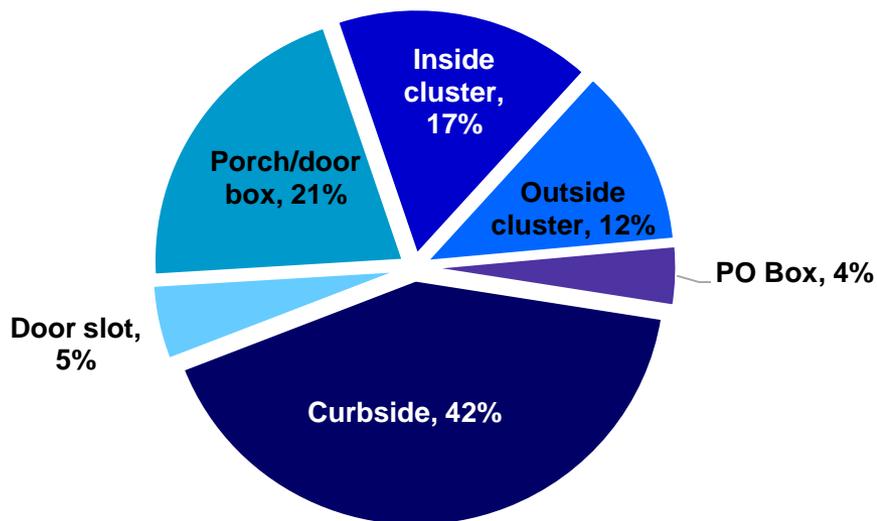


Appendix

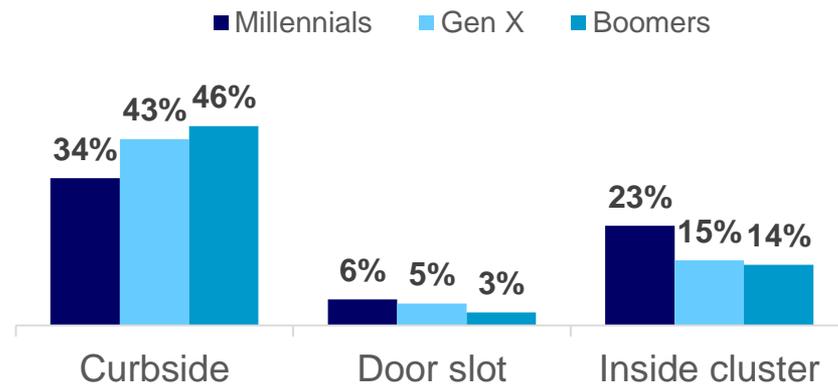


Type of Mailbox

Type of Mailbox



Significant Differences by Generation





Respondent Demographics

Gender		Total
	Male	43%
	Female	57%

Age		Total
	18 to 21	2%
	22 to 37	28%
	38 to 53	29%
	54 to 72	40%
	72 to 75	2%

Marital Status		Total
	Single	27%
	Married	55%
	Divorced/separated	13%
	Widowed	3%
	Other	2%

Ethnicity		Total
	Caucasian/White	66%
	Black/African American	14%
	Hispanic/Latino	12%
	Asian/Pacific Islander	6%
	American Indian/Eskimo	1%
	Multiracial/Other	2%

Household Income		Total
	Under \$50K	43%
	\$50K to \$100K	34%
	\$100K +	22%

Education		Total
	HS or less	17%
	Some college- no degree	26%
	Graduated college	41%
	Post graduate degree	4%

Employment Status		Total
	Employed full time	48%
	Employed part time	12%
	Student	2%
	Homemaker	10%
	Retired	22%
Unemployed	6%	



Respondent Demographics (cont.)

Location		Total
	Urban	44%
	Suburban	35%
	Rural	18%

Length of Time Living at Current Address		Total
	Less than 1 year	9%
	1-2 years	16%
	3-4 years	15%
	5 or more years	60%

Number of People in HH		Total
	Myself, one	23%
	2	37%
	3	18%
	4	15%
	5	5%
	6 or more	3%

Home Type		Total
	Single family home	68%
	Apartment	19%
	Condominium	4%
	Townhouse	5%
	Mobile home	3%
	Dormitory	0%

Region		Total
	Northeast	20%
	South	21%
	Midwest	38%
	West	20%

HH Make Up		Total
	Spouse/significant other	77%
	Mother, father, or in-laws	7%
	Child under 18 years	38%
	Child over 18 years	17%
	Other relatives	8%
	Others non-relatives	4%

Home Ownership		Total
	Own	69%
	Rent	31%

