



USPS Market Research & Insights

COVID Mail Attitudes

Understanding & Impact

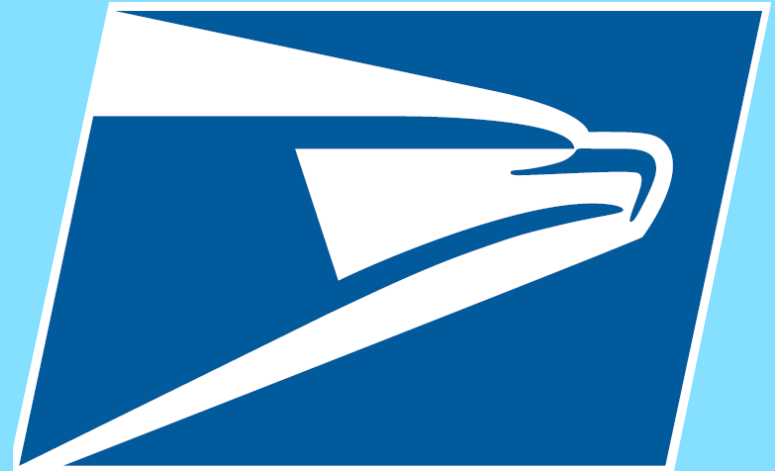
Doug Wiggins

Market Research & Insights

November 2020

The USPS Market Research & Insights Team Is Responsible For:

- Focus groups and other custom research
- Synthesis of primary and secondary research sources
- Quarterly insights deliverables for mail and shipping
- Addresses the state of USPS business and its competitors





Key Findings

Methodology

- Omnibus (online survey)
- # of survey respondents = 1,004 US adults
- Census representative of US population
- age 18+
- April 15-17 2020, November 16-18 2020
- Weighted by age, sex, geographic region, race and education (to match census breakdowns)

Findings

- Consumers are feeling increasingly isolated and distant from people.
- Two-thirds have/would send mail, with family and friends the most common recipients.
- Attitudes towards mail and the United States Postal Service have remained consistent through the COVID-19 pandemic



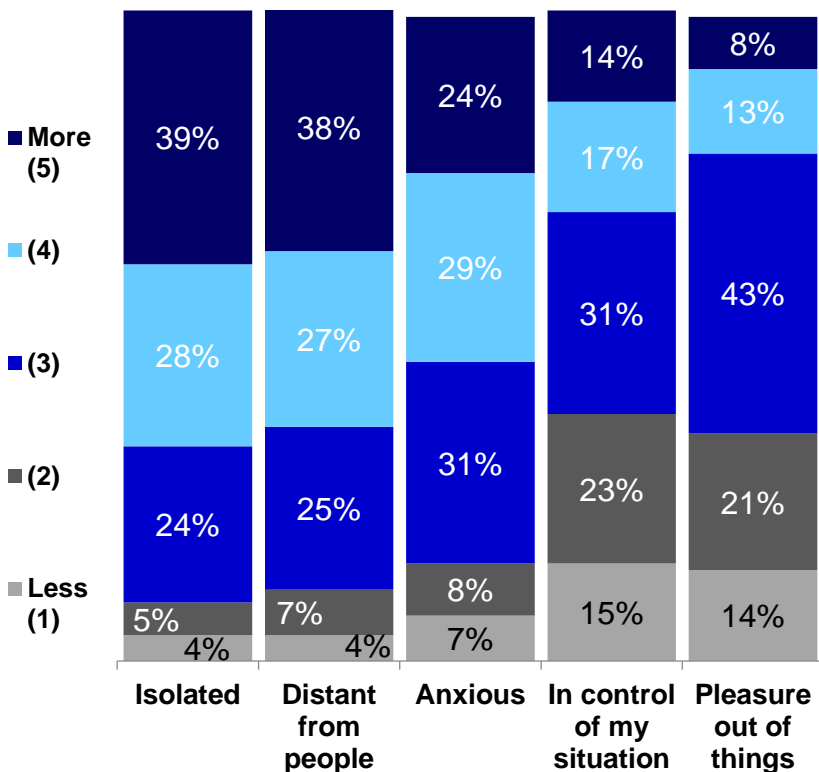
Evolving Attitudes – Change in Emotion

Consumers are continuing to feel increasingly isolated and distant from people.

Q2. How has the Coronavirus pandemic affected your mental wellbeing?

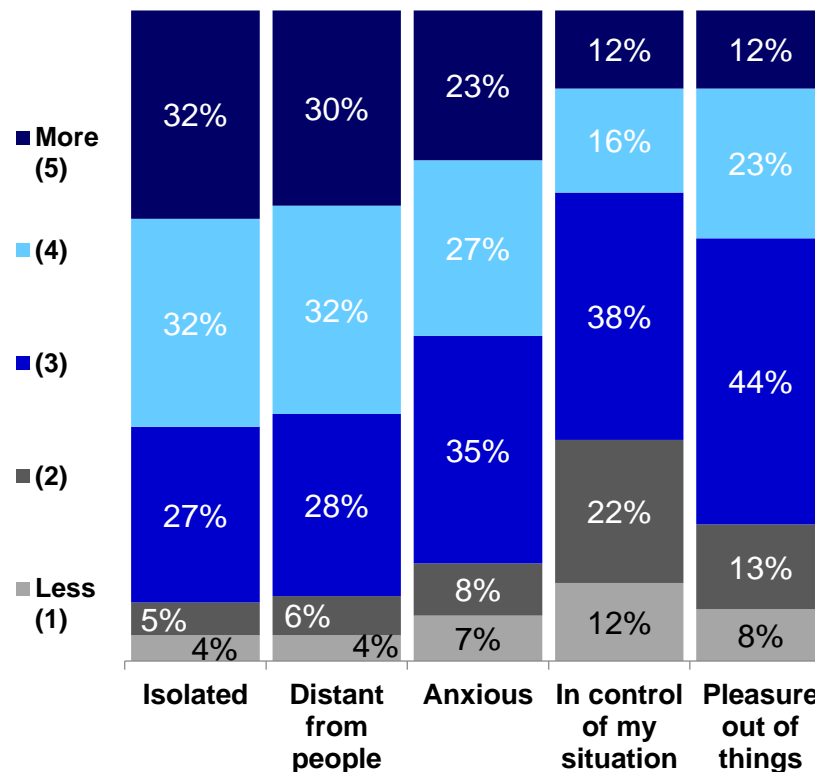
April

More (Top 2 Box Combined)	67%	65%	53%	31%	21%
---------------------------	-----	-----	-----	-----	-----



November

More (Top 2 Box Combined)	64%	62%	50%	28%	36%
---------------------------	-----	-----	-----	-----	-----



[New]

Base: Total (1004)
Source: Omnibus 4/15-4/17, 11/16-11/18

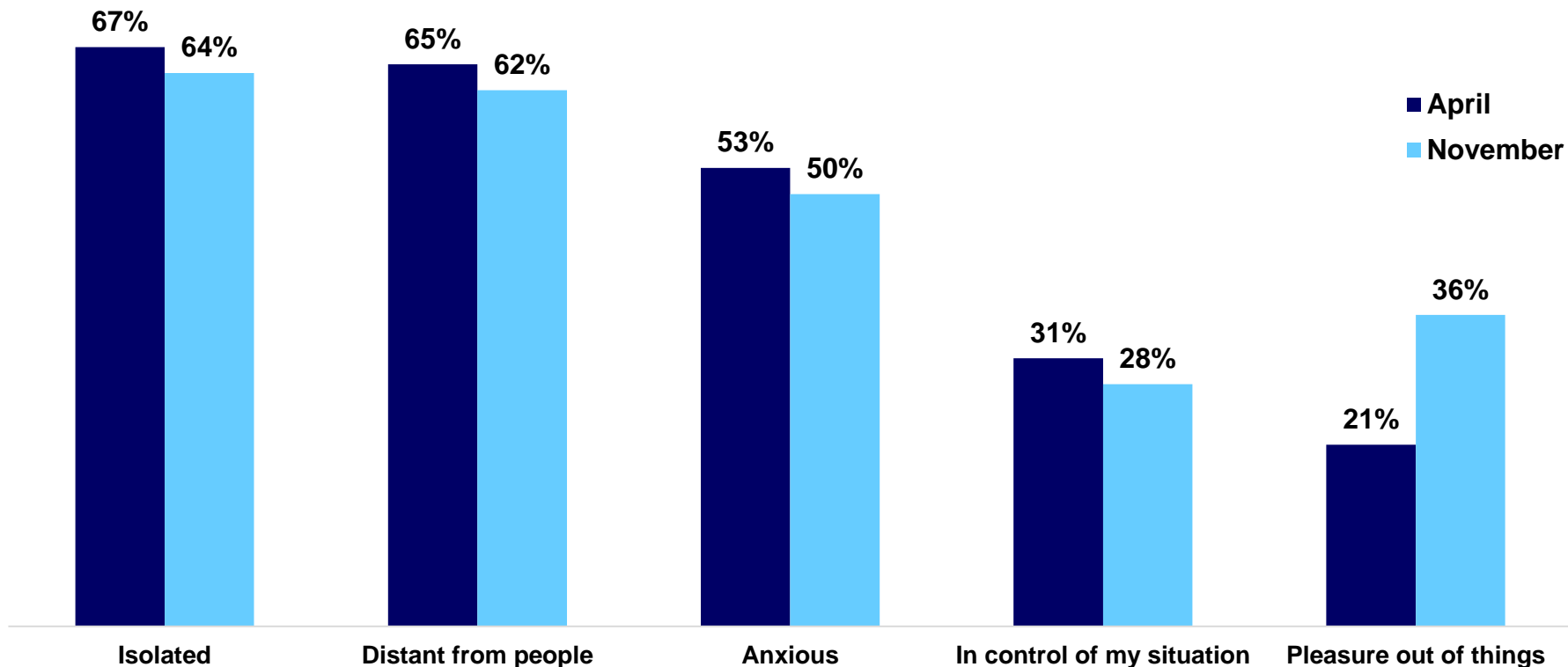


Evolving Attitudes – Change in Emotion

Consumers are continuing to feel increasingly isolated and distant from people.

Q2. How has the Coronavirus pandemic affected your mental wellbeing?

Increase in Emotion (Top 2 Box, 5pt Scale)



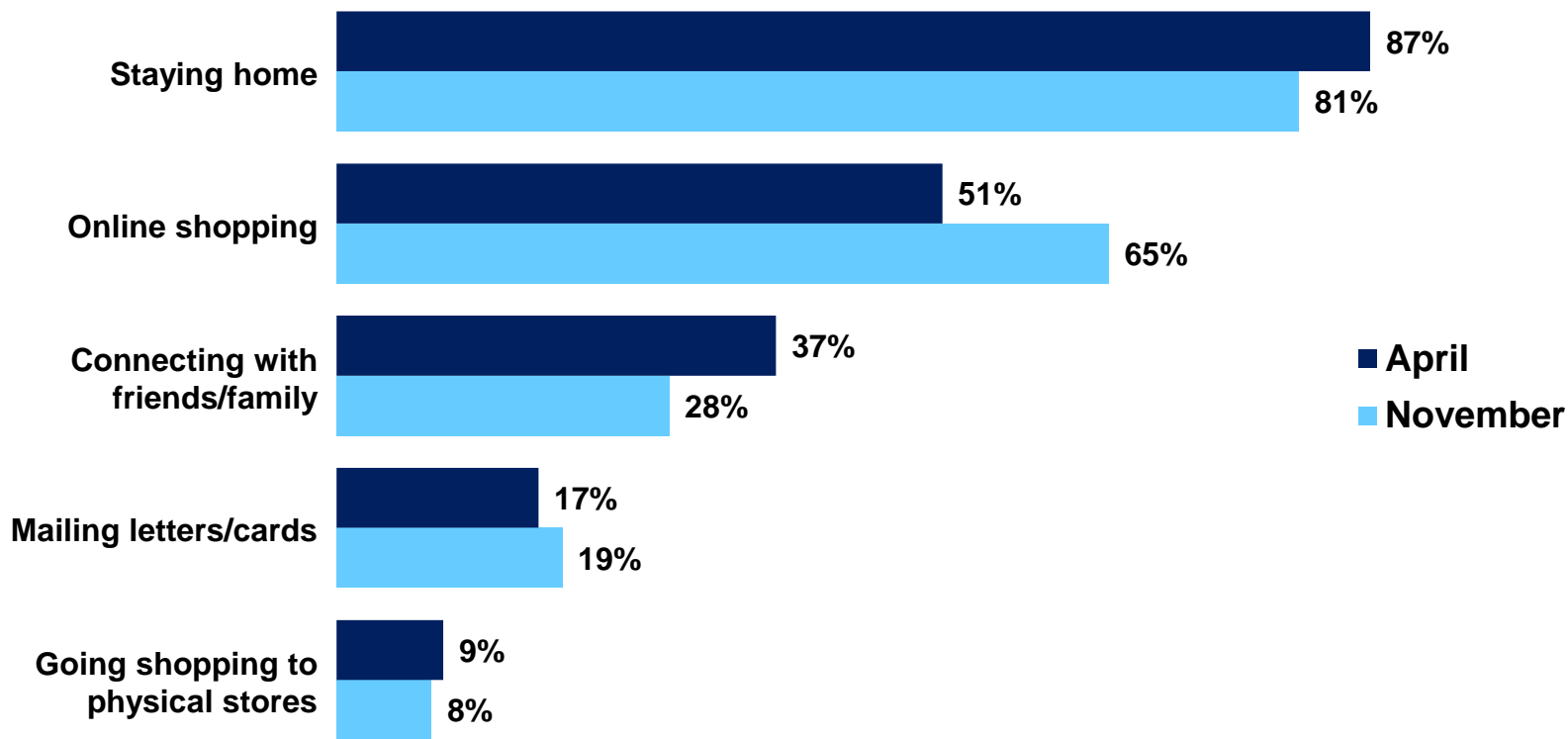


Activities done more of in past few weeks

Around 1-in-6 consumers have been sending more letters/cards over the past few weeks. This skews higher income and those with kids in the home.

Q1. Thinking about your personal behavior since the coronavirus outbreak. How would you say each of these has changed, if at all, since the beginning of the pandemic?

Done a lot/little more

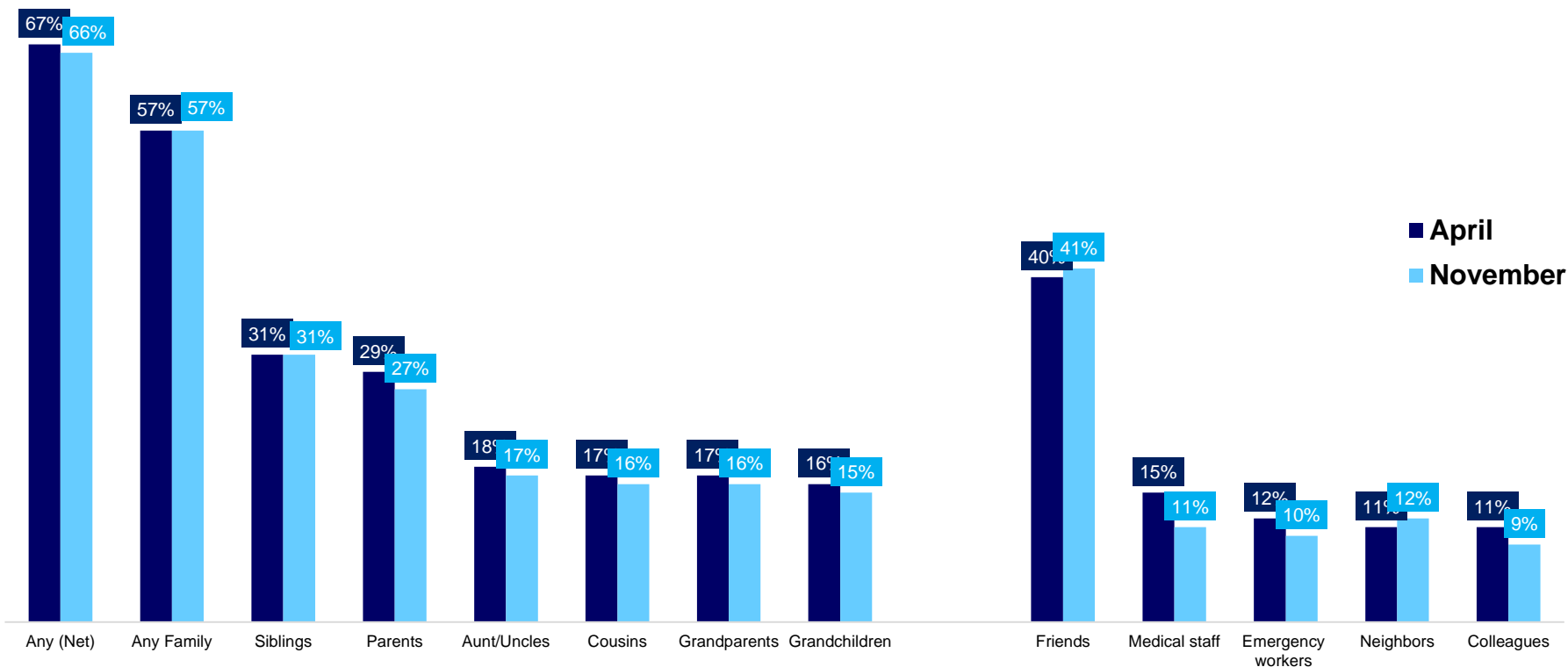




Sending Personal Correspondence

Two-thirds have/would send mail, with family and friends the most common recipients. Individuals who are younger, have higher income and those with kids in the home are more likely to want to send cards/letters.

Q3. During the Coronavirus pandemic, which of the following groups of people have or would you send greeting cards or letters to?





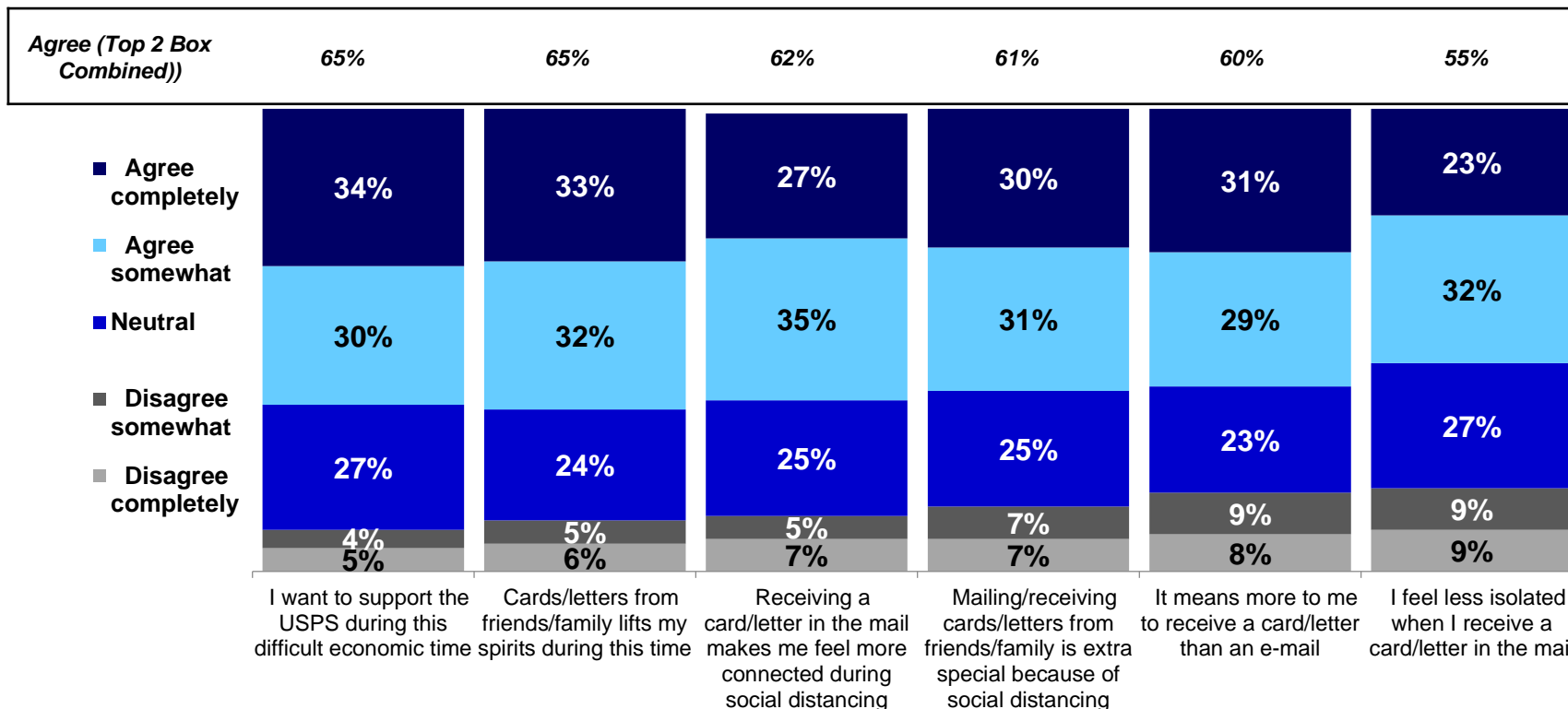
Attitudes/Experiences

The majority want to support USPS during this time and agree that receiving mail lifts their spirits. Mail is extra special during this time of social distancing.

Q4. Thinking specifically about your experience during the Coronavirus pandemic, how much do you agree with the following?

Q5. Thinking specifically about your attitudes towards sending mail during the Coronavirus pandemic, how much do you agree with the following?

April





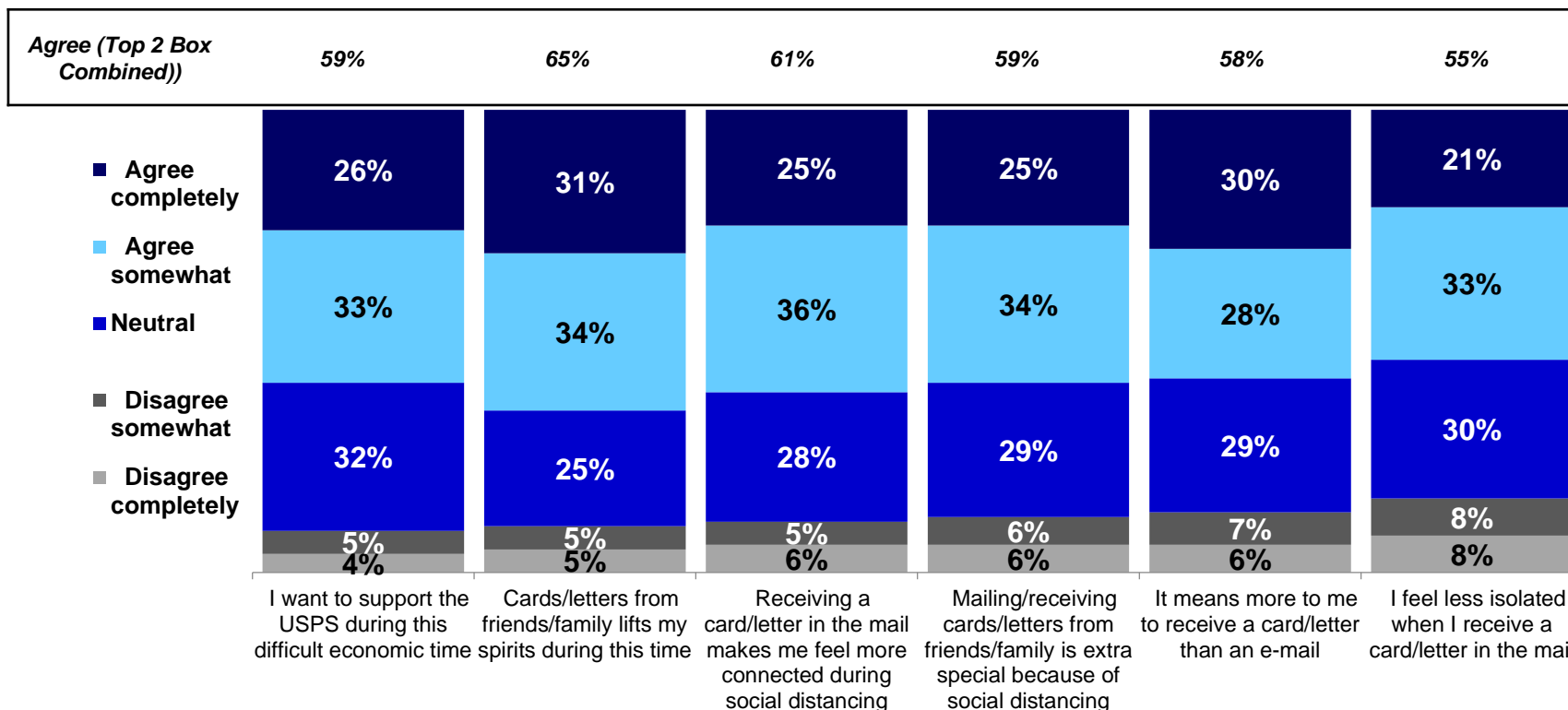
Attitudes/Experiences

The majority want to support USPS during this time and agree that receiving mail lifts their spirits. Mail is extra special during this time of social distancing.

Q4. Thinking specifically about your experience during the Coronavirus pandemic, how much do you agree with the following?

Q5. Thinking specifically about your attitudes towards sending mail during the Coronavirus pandemic, how much do you agree with the following?

November





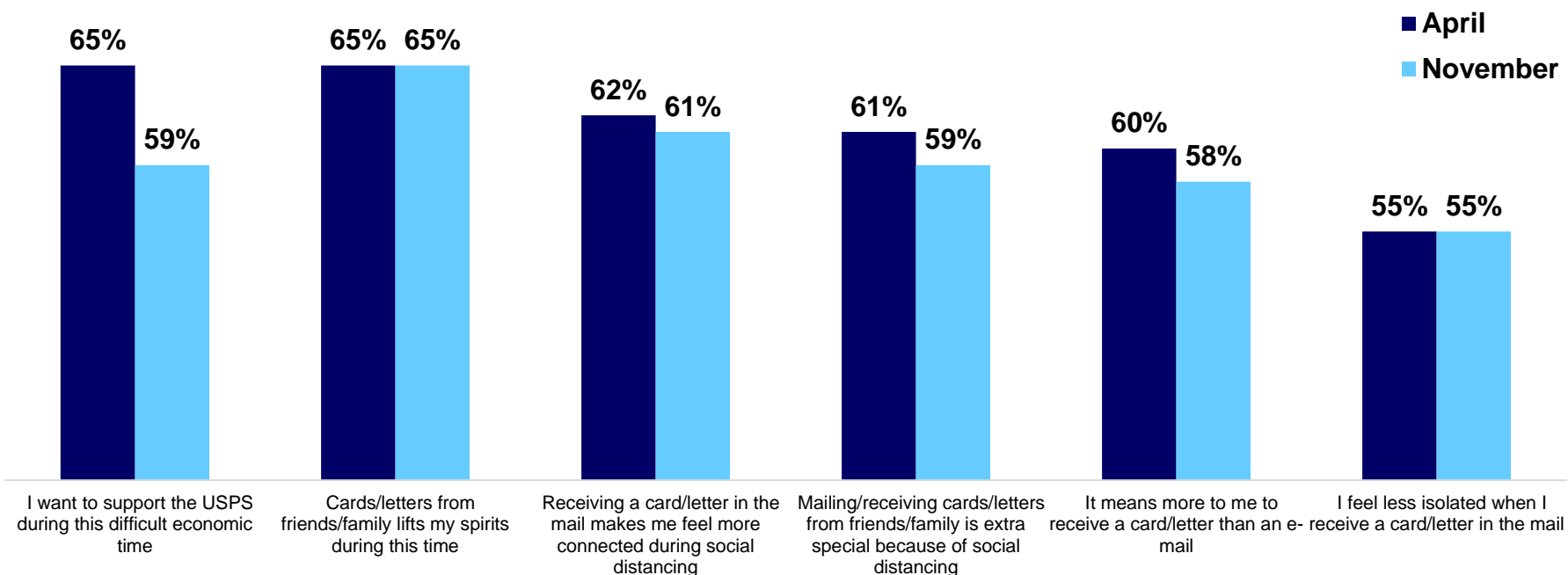
Attitudes/Experiences

The majority want to support USPS during this time and agree that receiving mail lifts their spirits. Mail is extra special during this time of social distancing.

Q4. Thinking specifically about your experience during the Coronavirus pandemic, how much do you agree with the following?

Q5. Thinking specifically about your attitudes towards sending mail during the Coronavirus pandemic, how much do you agree with the following?

% Agree with Statement (Top 2 Box, 5pt Scale)





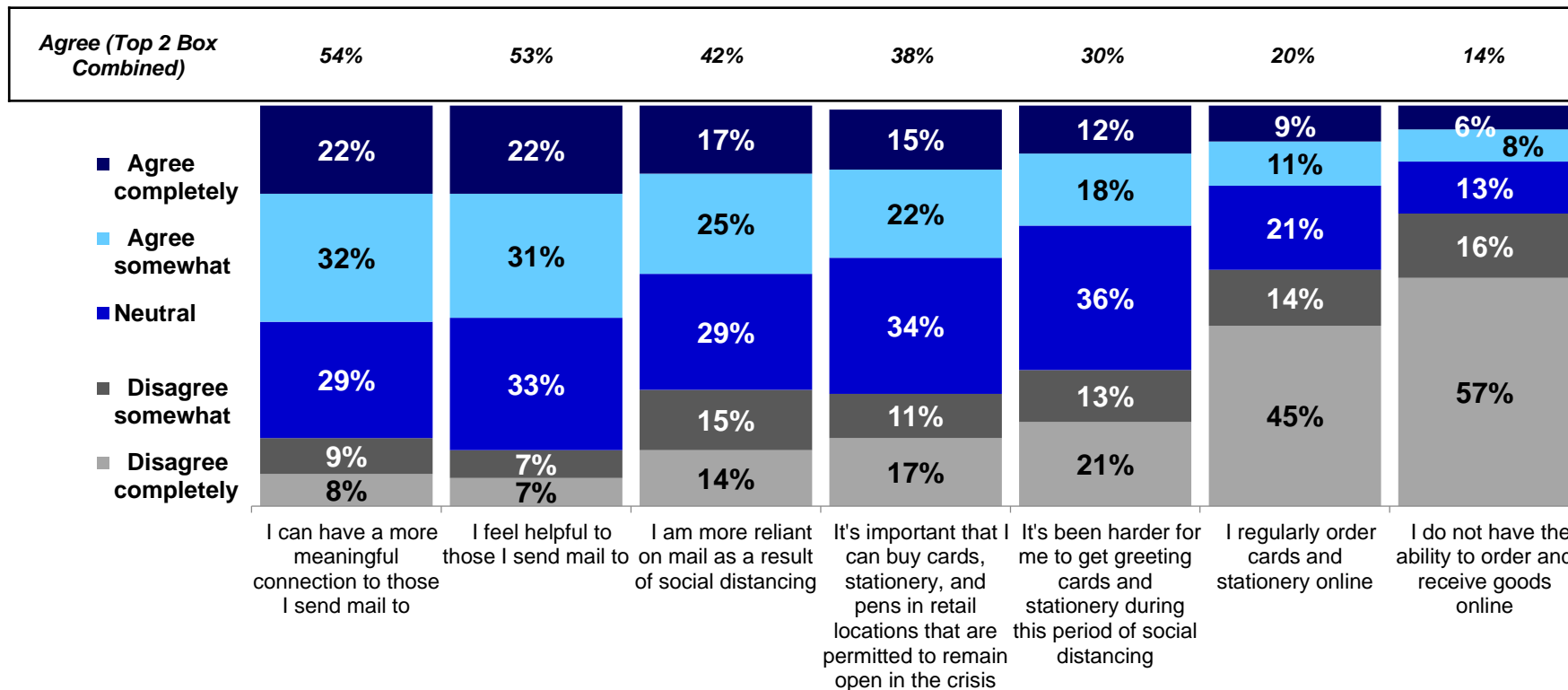
Attitudes/Experiences

Respondents find they can have a more meaningful connection to those they send mail to, while some indicate the importance of flexibility in how they shop for mail products

Q4. Thinking specifically about your experience during the Coronavirus pandemic, how much do you agree with the following?

Q5. Thinking specifically about your attitudes towards sending mail during the Coronavirus pandemic, how much do you agree with the following?

April





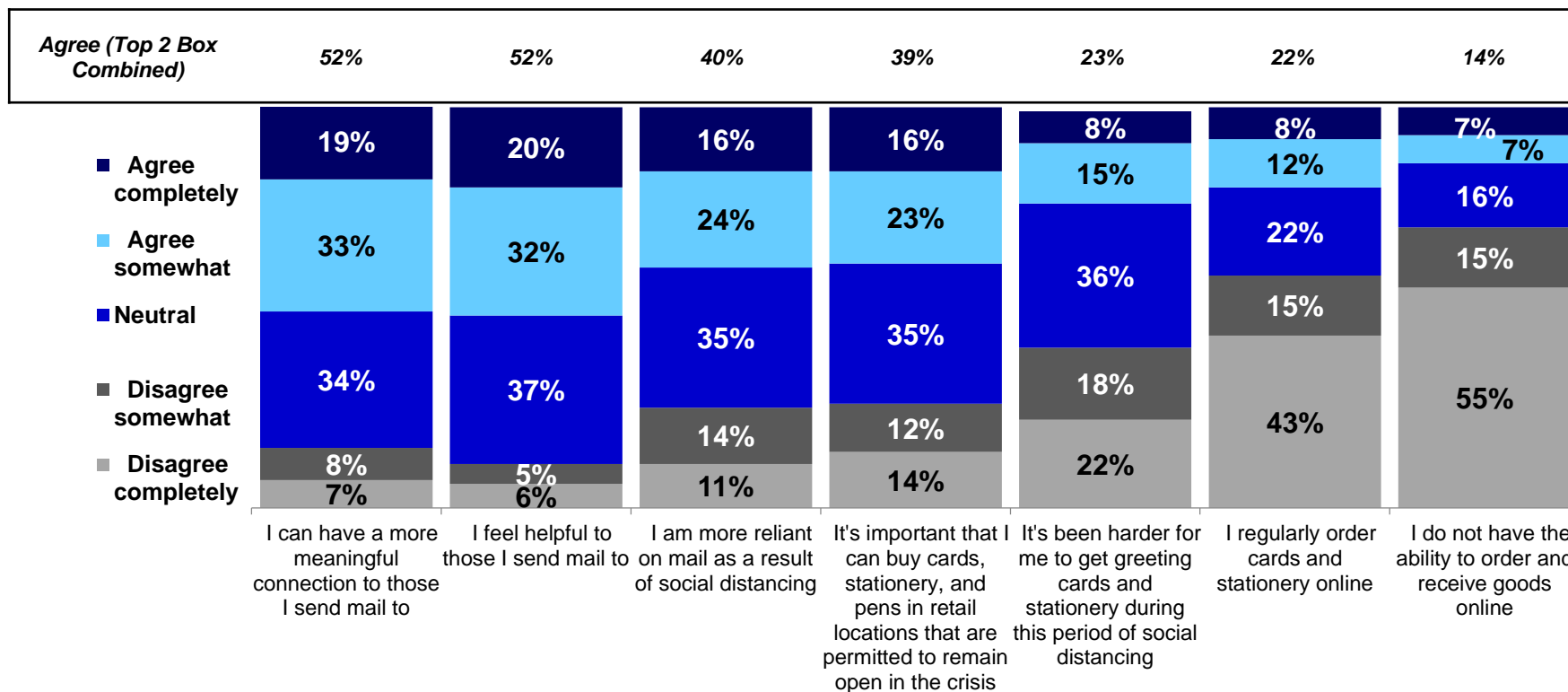
Attitudes/Experiences

Respondents find they can have a more meaningful connection to those they send mail to, while some indicate the importance of flexibility in how they shop for mail products

Q4. Thinking specifically about your experience during the Coronavirus pandemic, how much do you agree with the following?

Q5. Thinking specifically about your attitudes towards sending mail during the Coronavirus pandemic, how much do you agree with the following?

November





Attitudes/Experiences

Respondents find they can have a more meaningful connection to those they send mail to, while some indicate the importance of flexibility in how they shop for mail products

Q4. Thinking specifically about your experience during the Coronavirus pandemic, how much do you agree with the following?

Q5. Thinking specifically about your attitudes towards sending mail during the Coronavirus pandemic, how much do you agree with the following?

% Agree with Statement (Top 2 Box, 5pt Scale)

