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THE MAIL MOMENT

THE VALUE OF MAIL IN A MULTI- CHANNEL WORLD

Key Conclusions on the Value of Mail



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Conclusion #1: Consumers value their mail and depend on it to help them with their lives and run their household

- ❑ Conclusion #2: Mail brings order to important jobs in running the home and is used throughout the week in Mail Moments
- ❑ Conclusion #3: Mail creates an intense engagement with the receiver of the communications
- ❑ Conclusion #4: Mail's importance is at risk because not all mail is perceived as valuable, relevant, and personal



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Consumers Value and Depend on the Mail

Mail is a fundamental element of our daily lives

- ☐ Mail connects us to the market and provides important news
- ☐ Mail provides needed information, helping us run the home
- ☐ Mail is critical in helping us manage our household finances



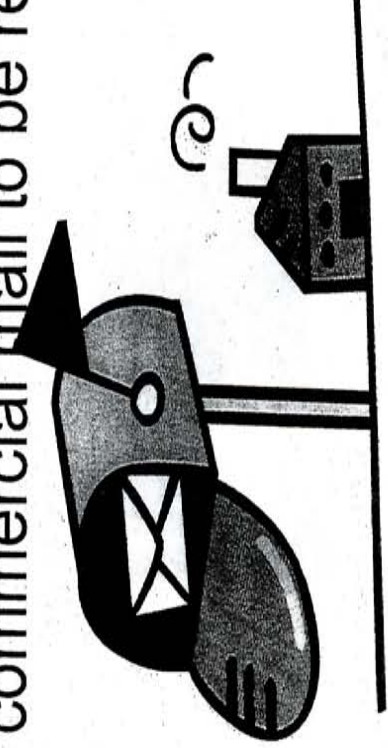


Mail Connects the Consumers

- Two-thirds of the consumers do not expect to receive personal mail but when they do, **it makes their day**

This “hope” keeps them coming back every day

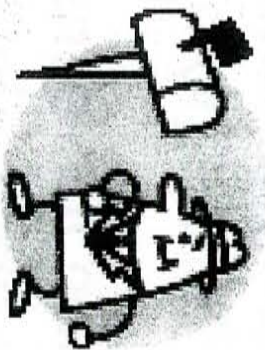
- Consumers expect to receive commercial mail (bills, statements, magazines, catalogs and advertising)
- They want this commercial mail to be relevant and useful





The Mail Box is the Gateway into the Home

Collecting the mail is one of the most fundamental habits of home life



- ☐ It is the first thing done when getting home at the end of the day
- ☐ And, in most homes, sorting the mail once in the house is the very next thing done.

Bringing in the Mail



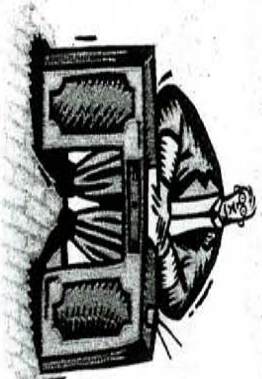
Collecting the mail is a moment of pleasure

- It is a time when the consumer is making the transition from work life to the home life
- It is a time when the consumer is leaving behind the stress of work and enjoying the home life
 - ✓ It helps me unwind
 - ✓ I am taking a "time out"
 - ✓ It keeps me in touch with what's going on
- Over half (55%) look forward to discover what is in their mail



The CEO of the Mail

- ☐ Mail is so central to running the household that one person, the CEO of the Mail, takes the responsibility of managing the mail



- ☐ And, because mail is so important to the basic functions within the home (shopping and paying bills), the CEO of the Mail also typically handles the shopping and manages the finances *80-858*

The Mail Moment



- ☐ Mail is so critical in helping consumers run their home life that they have multiple **Mail Moments**, lasting 30 minutes, throughout the week
- ☐ During these Mail Moments, the consumers use the mail to manage the important jobs of the home



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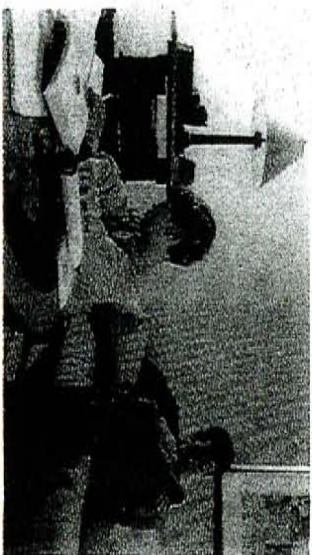
The Mail Jobs

Mail is used in 4 key jobs in the home

- ☰ It helps in managing the home operations
- ☰ It helps in managing relationships
- ☰ It helps in managing the HH finances



- ☰ It allows for enjoyable browsing for ideas, escape, and entertainment





Mail's Value Is Deep-Seated

Percent Agreeing with Statements about Mail

I value the privacy of mail	75%
I value the security of the mail	68%
I value the reliability of mail	65%
I enjoy taking time to browse catalogs	63%
I sort through mail for coupons and bargains	63%



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Mail has significant strengths versus the Internet

Percent Agreeing with Statements about Mail

Bills in my mailbox are easier to deal with than those sent email **67%**

Mail is more private **66%**

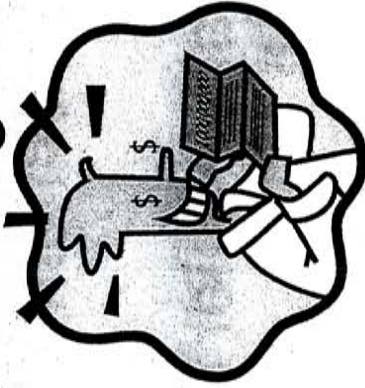
Mail is more personal **57%**

Note: % top 2 box scores on 5 point Agree/Disagree scale



The Value of Mail is at Risk

Too much mail is not doing the jobs consumers expect from it



- About 40 percent of consumers think their next mail delivery will have mail with little or no value to them
- Over one third (35%) of commercial mail has no explicit value for consumers



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Improving the Value of Mail

Improving the value of mail is critical if we want to retain younger consumers in the mail


Attitude About the
Consumers' Bond with Mail:
*"I really depend on mail
and would be lost without it"*


<u>Age of Consumer</u>	<u>Total Sample Percent Top 2 Boxes</u>
60 years and over	62%
50-59 years	52%
40-49 years	52%
Under 40 years	45%
Base	1500

Note: % top 2 box scores on 5 point Agree/Disagree scale




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 Conclusion #4: Mail's importance is at risk because not all mail is perceived as valuable, relevant, and personal