



# Australia Post Consumer Survey Mail Findings

Research into consumer preferences of marketing and transactional communications.



# Methodology

The Australia Post Consumer Survey measures consumer attitudes and behaviours of interest to Australia Post, particularly mail (letters), parcels and retail. The Australia Post Consumer Survey Mail Findings is an extract of insights from the mail (letters) area of the survey.

## Participants

1,000 Australians are surveyed online each quarter. Australia Post utilise Quality Online Research (QOR) to compose a panel of respondents that best represents the Australian population in terms of age, gender and geographic location.

## Survey

The mail section of the survey looks at how much mail participants receive and read specific to various industry sectors and types of information. This is based on recall of what has been received in the letterbox in the previous week. In addition, respondents are asked to specify their preferences for receiving advertising and promotional messages across various industry sectors and transaction types. Preferences for advertising and promotional messages were differentiated between when a respondent is an existing customer of an organisation, and when no previous relationship exists. Respondents defined their own eligibility as a 'customer' or 'not a customer'.

# Executive Summary

- Mail continues to deliver personalisation and cut-through.
- The majority of people check mail daily suggesting it has strong personal relevance.
- Readership remains high for personalised communication, with promotional communication also delivering high recall rates.
- Almost eight in ten young people read their mail.
- Mail strengthens community connections for regional residents.
- People spend considerable time engaging with their mail. And most interact with it on the day it arrives.
- In addition to reading their mail, over half of people store for later reference.
- People want to choose how they are communicated with, with choice equally important to existing customers.
- Despite an influx of technology, physical communications hold their own with young people

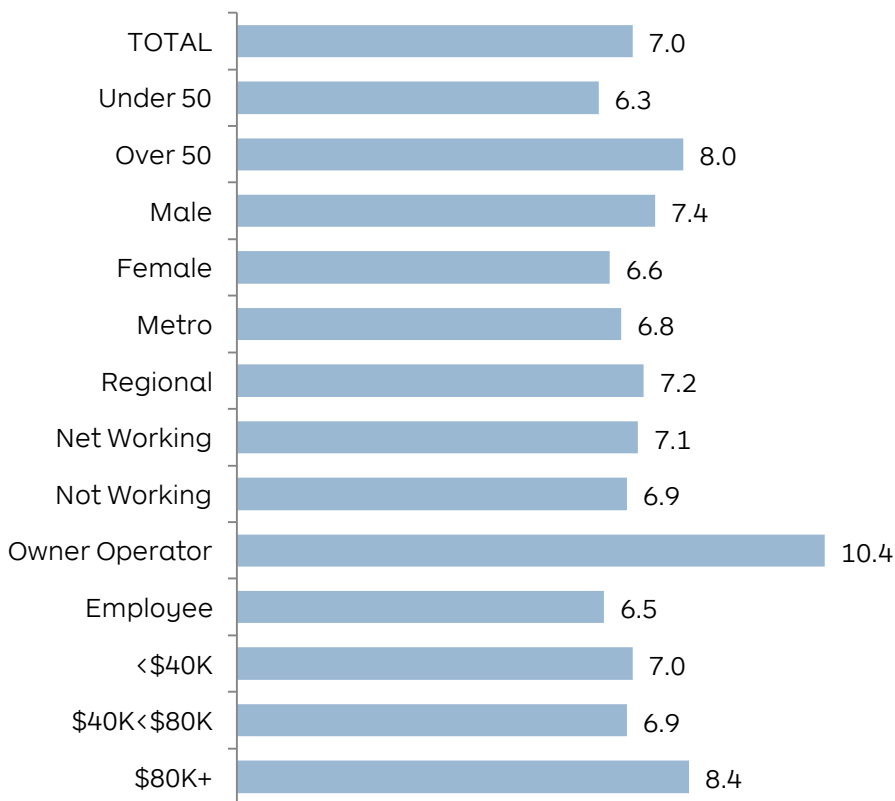
# Mail continues to deliver personalisation and cut-through

Thinking about the amount of mail you have delivered to your postal address. How many pieces of mail would you have had delivered in the last week that was personally addressed to you?

The average Australian recalls receiving 7.0 items personally addressed to them in the one week. This is slightly down on the same period last year (7.4 items per week).

However consistent with last year, business owners, those aged 50+, males and households with higher incomes continue to receive more mail than others.

High levels of recall suggest consumers still engage with personalised communication. As a channel, the letterbox can facilitate a one-to-one connection which enables your message to stand out in a crowded marketplace.



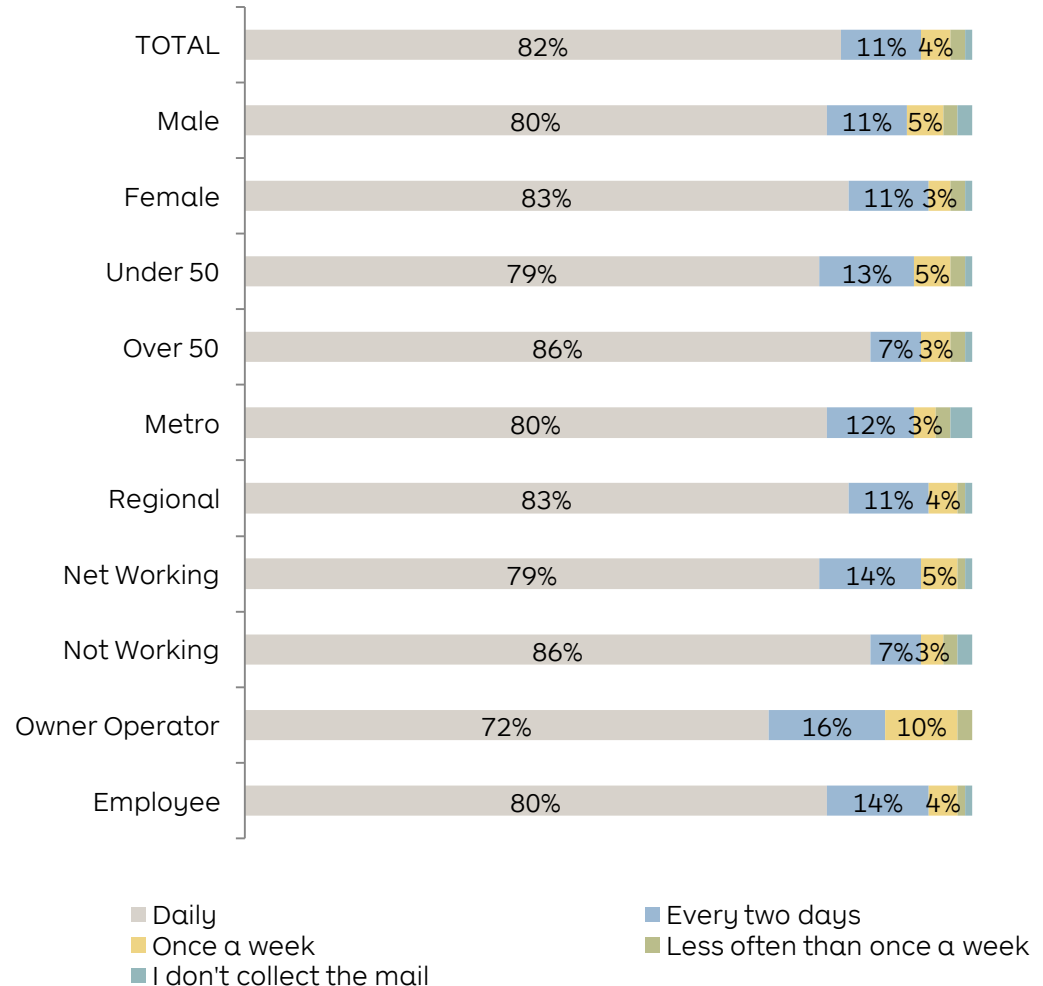
# The majority of people check mail daily, suggesting it has strong personal relevance

How often do you normally check your mail?

82% of people check their mail daily.

The decision to actively and regularly engage with their letterbox suggests people find its contents to be personally relevant.

Females and those aged 50+ are more like to be daily mail checkers. Approximately 7 out of 10 business owners check daily which is particularly high given the prevalent use of PO Boxes to house their mail.



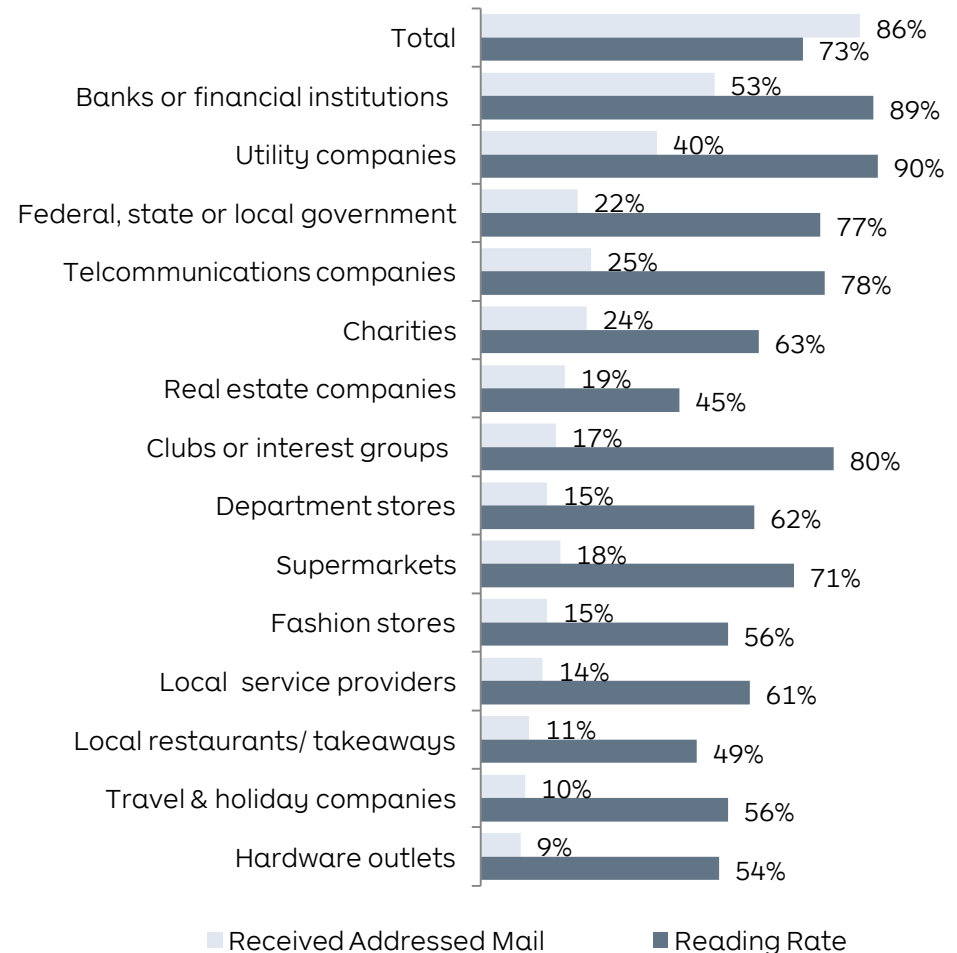
# Readership remains high for personalised communication

In the last week have you received any mail directly addressed to you from any of the following institutions....., and did you read this mail ?

Overall respondents reported receiving similar levels of addressed mail across most categories this quarter, with increases across banks & financial institutions (up 5%), government (up 4%), and local service providers (up 3%) from the last quarter.

Reading rates have slightly increased from last quarter with Australian households reading 73% of the addressed mail they receive.

Transactional mail continues to be strong with reports of more addressed mail and higher reading rates from utility companies (90%), banks & financial institutions (89%), telecommunication companies (78%) and government departments (77%).



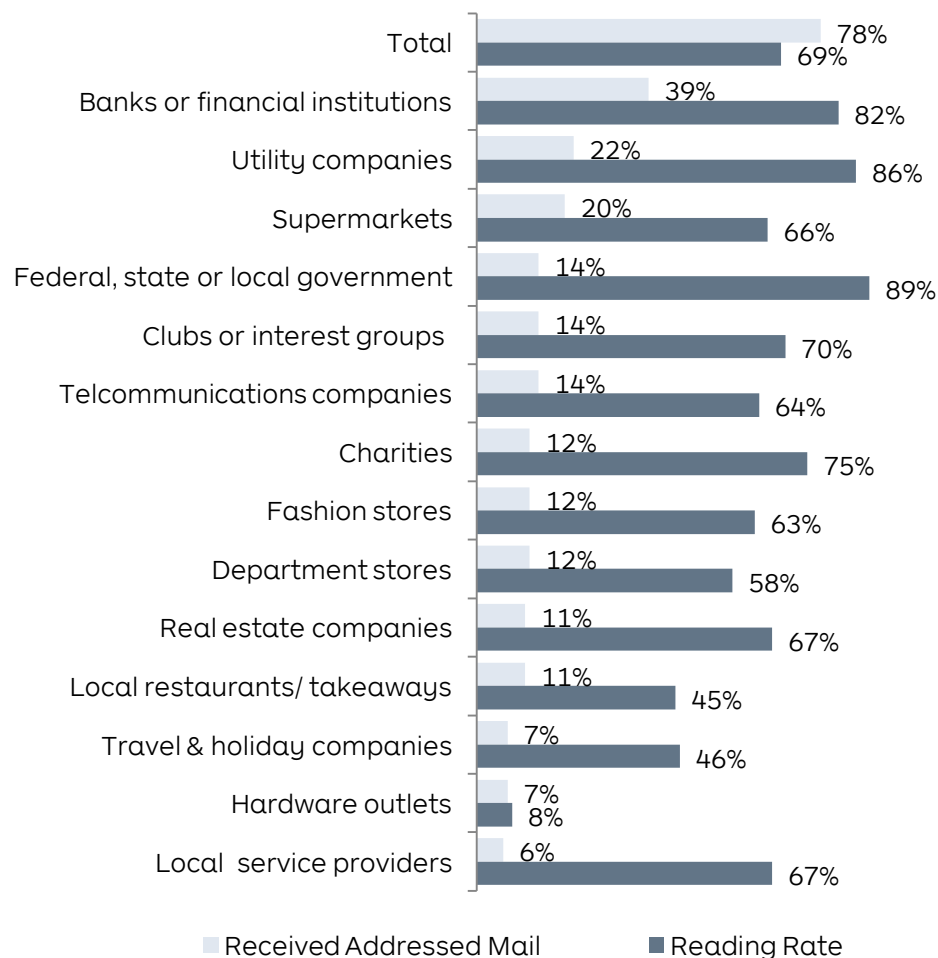
# Almost seven in ten young people read their mail

In the last week have you received any mail directly addressed to you from any of the following institutions....., and did you read this mail ?

78% of young people aged 18-29 years old reported receiving addressed mail over the course of a week.

Whilst in comparison to the total sample they received less mail across the majority of categories, they read a higher percentage of their mail from government, fashion stores, real estate companies and local service providers.

This suggests young people are still engaged with mail particularly when it addresses their specific interests.



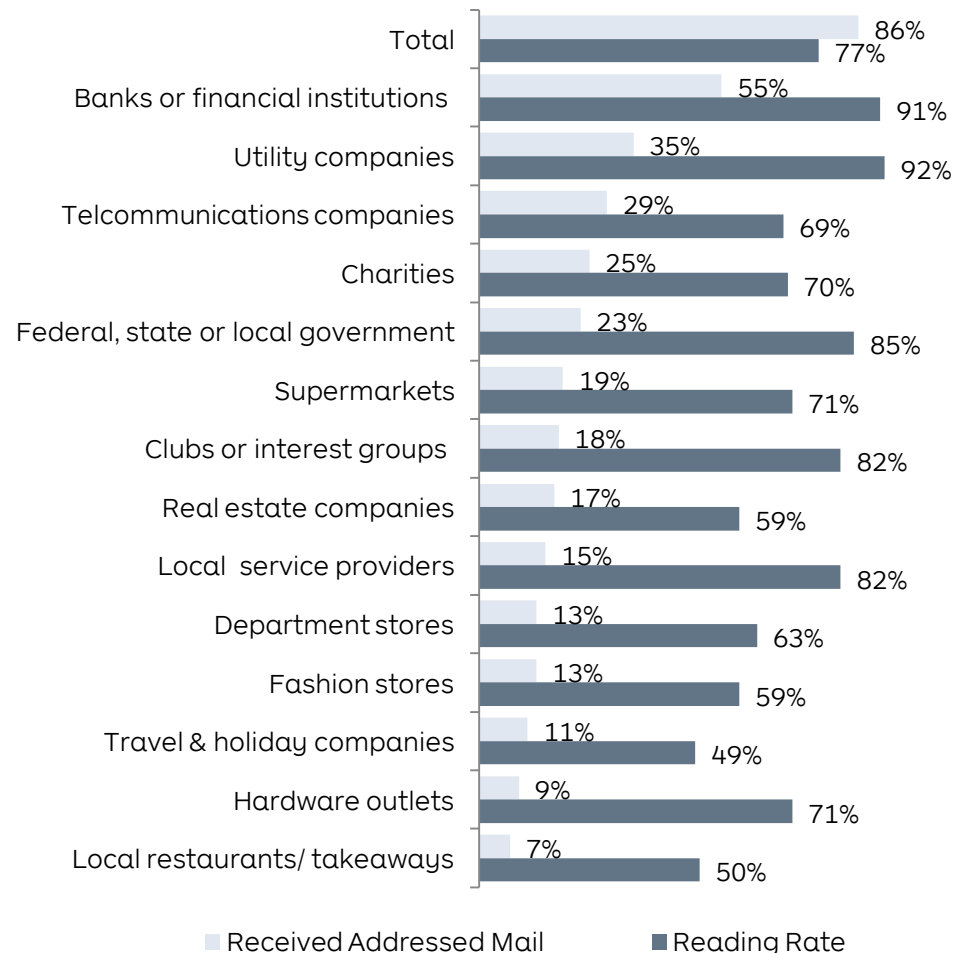
# Mail strengthens community connections for regional residents

In the last week have you received any mail directly addressed to you from any of the following institutions....., and did you read this mail ?

Respondents in regional locations reported receiving addressed mail at levels consistent with the total sample. However they did surpass the total sample in terms of reading rates, with regional respondents reading 77% of their mail.

Reading rates exceeded the total sample across 12 of the 14 institution types with particular emphasis on local service providers (82% versus 61%), hardware outlets (71% versus 54%), charities (70% versus 63%) and government (85% versus 77%).

This suggests people in regional areas understand the value of mail in allowing them to stay connected and contribute to their community.





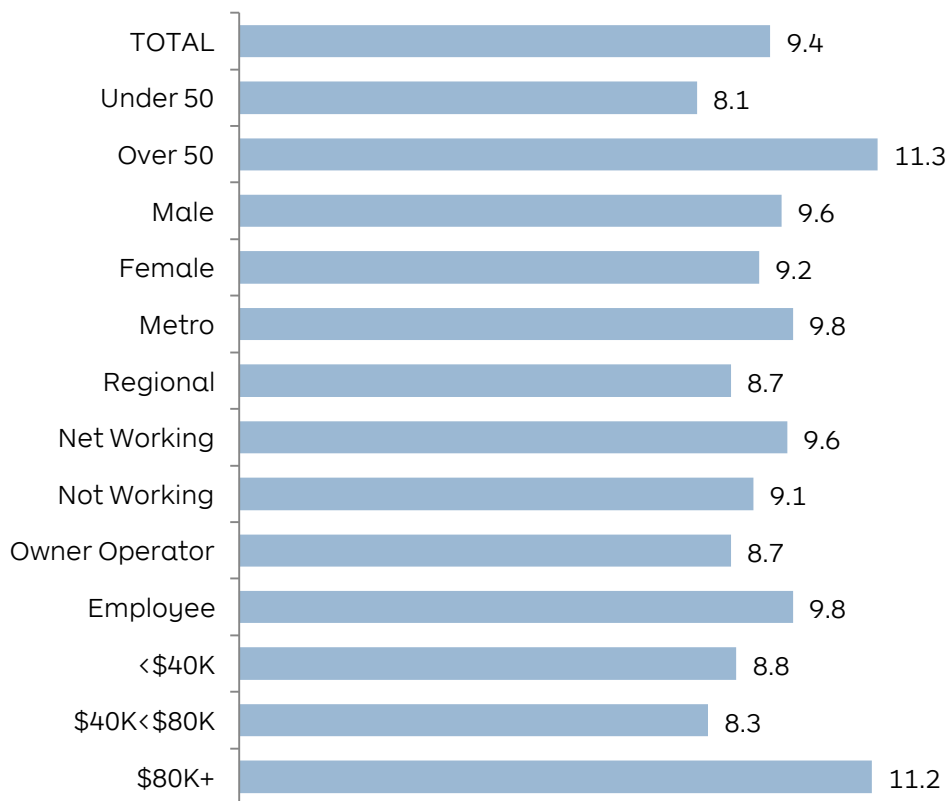
## Promotional communication delivers high recall rates

In the past week approximately how many unaddressed catalogues, flyers, brochures, samples or coupons would you have had delivered to your household?

The average Australian recalls receiving 9.4 unaddressed items at their household over one week.

Like addressed mail those aged 50 + and those earning greater than \$80K reported receiving higher volumes of unaddressed mail than others.

Business owners report receiving less unaddressed mail than employees in contrast to addressed mail where they report receiving more.



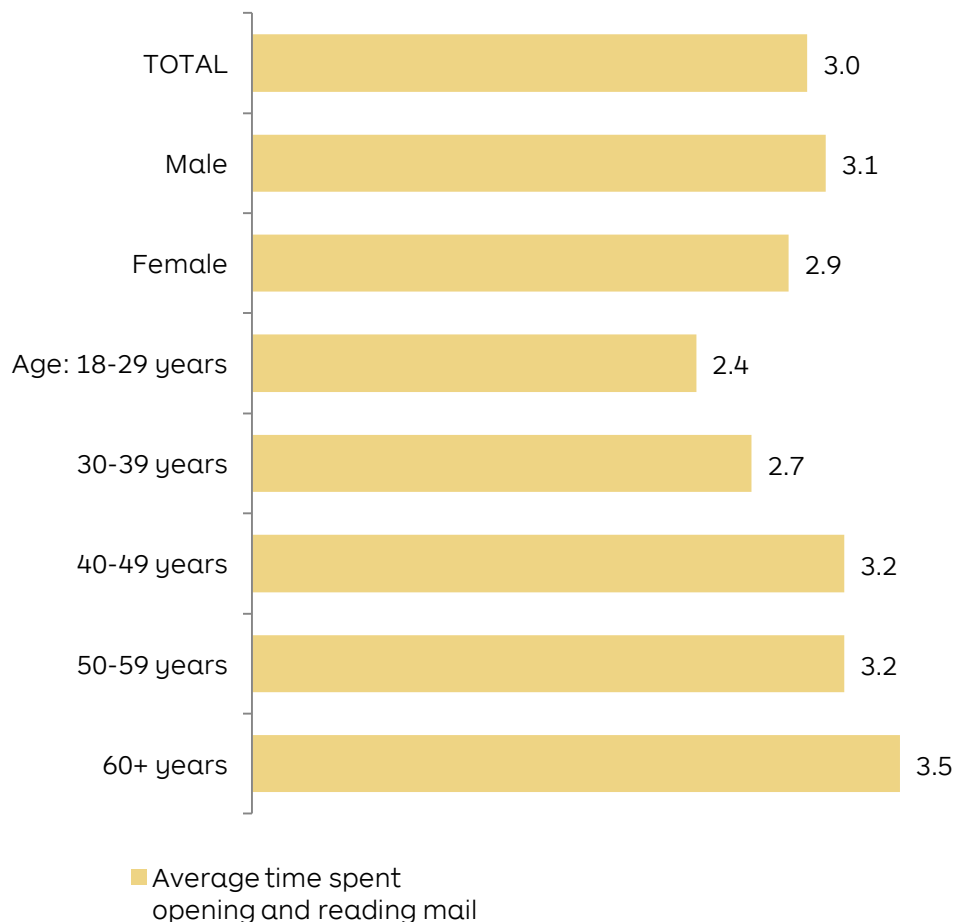
# People spend considerable time engaging with their mail

On average, how long does it take you to open and read the mail you have delivered daily?

The average time spent opening and reading mail is 3.00 minutes, consistent with last quarter.

While reading time decreases as age increases, people under 30 years old are still spending well over two minutes interacting with their mail.

Considering media fragmentation and the multi-screen phenomenon, this level of engagement for a single communication is very high suggesting mail has the ability to capture and sustain attention for all ages.

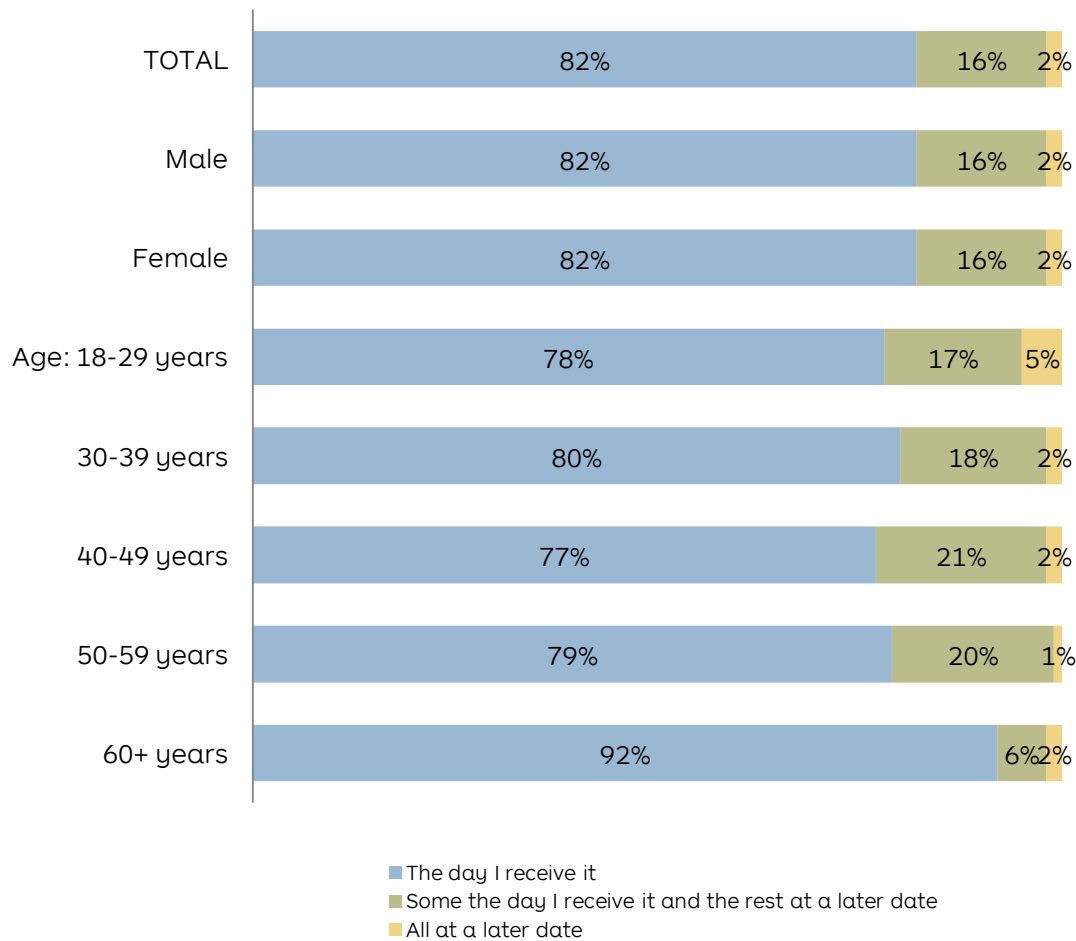


## And most interact with it on the day it arrives

On average, when do you usually read your mail?

Over 80% of people read all their mail on the day it is received. Amid a plethora of messages, this indicates that mail remains a medium that can hold its own.

This immediate behaviour also highlights the high value and relevance that people place on what is received in their letterbox.



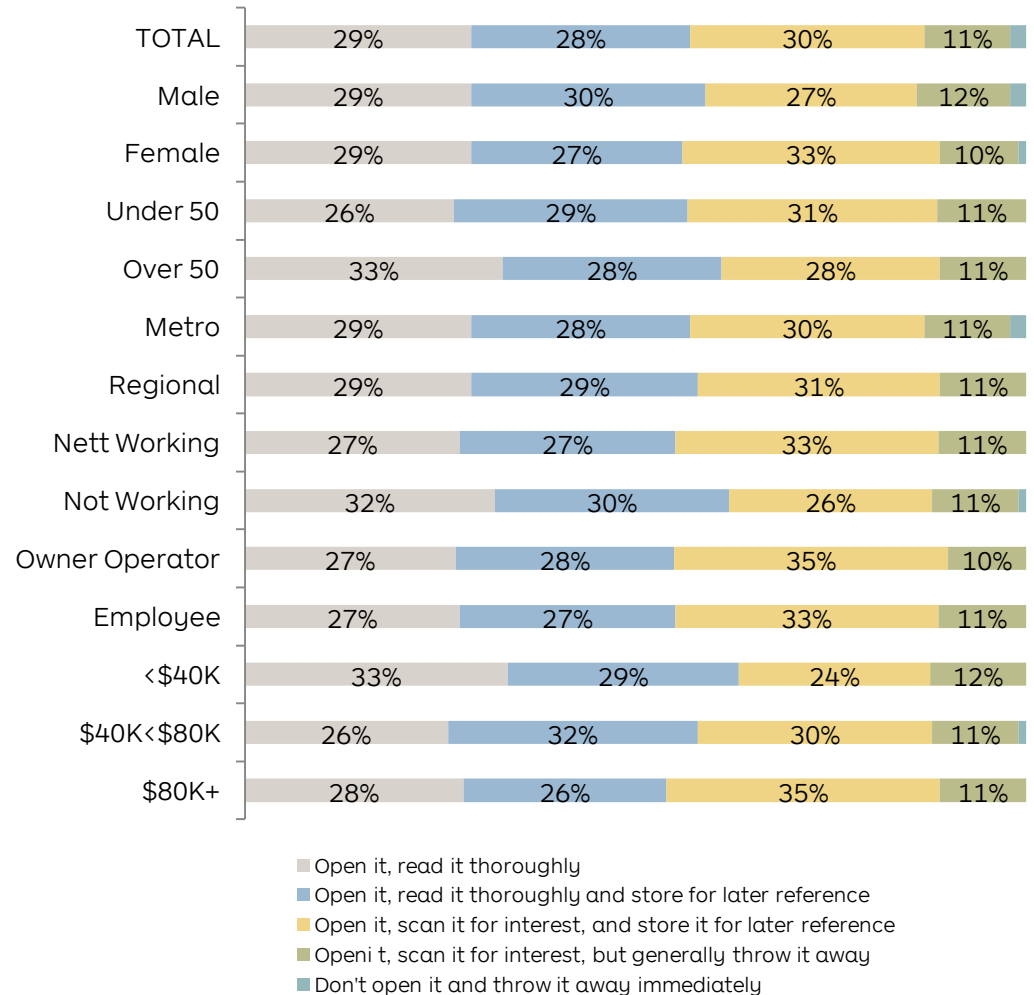
# In addition to reading their mail, over half of people store for later reference

Please indicate your general behaviour when you receive your mail.

Regardless of demographic or socioeconomic attributes, 98% of people open their mail and 57% read it thoroughly.

With 58% of people storing their mail for later reference, this indicates the high level of importance that people place on their mail.

This also supports the belief that mail allows the audience to choose the time they want to engage, making them more receptive to its message.



# People want to choose how they are communicated with

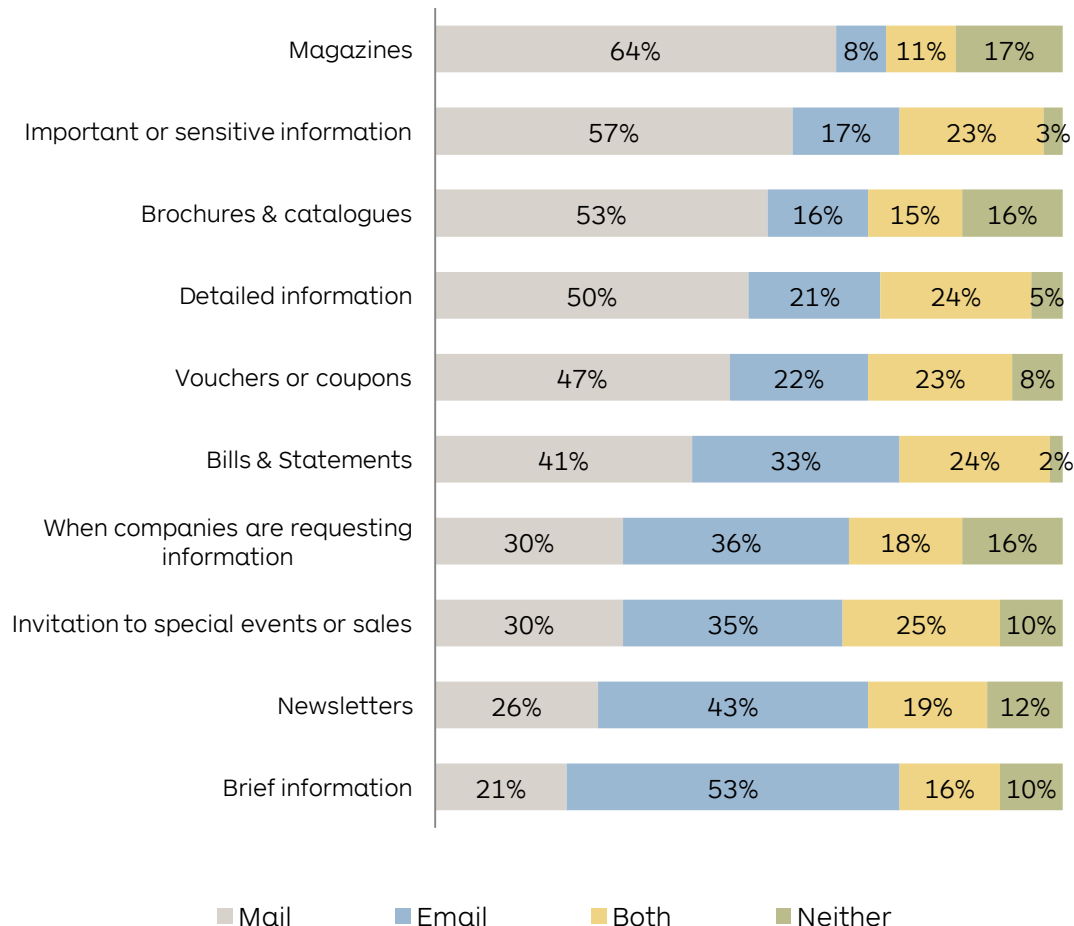
How would you prefer to receive the following types of communication?

Mail preference still dominates six out of ten of the communication categories.

However compared to last quarter, preference to receive both mail and email grew or remained steady for the majority of communication categories

This may indicate that people desire multiple options to address their different needs.

For example, magazines, important or sensitive information and newsletters all increased by 3% which could suggest people wish to partner the benefits of the credibility of mail with the portability of email.



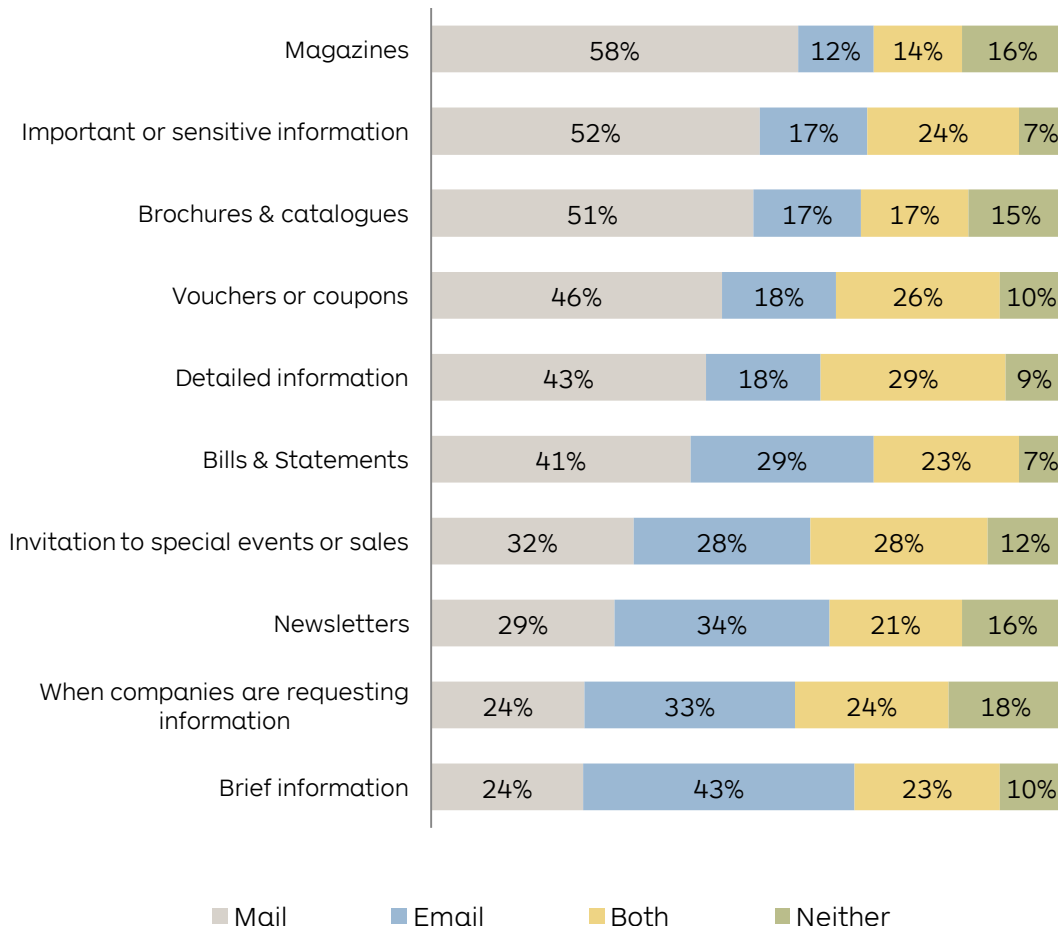
# Despite an influx of technology, physical communications hold their own with young people

How would you prefer to receive the following types of communication?

Young people (18-24 years old) still prefer to receive mail across six out of ten communication types.

Young people have a higher preference than the total sample for receiving both mail and email across eight out of ten categories suggesting young people are demanding choice.

A recent report on Australian loyalty programmes suggested that mail holds a novelty for young people due to its tangible nature and an association with 'good news'.<sup>1</sup>



<sup>1</sup>For Love of Money: 2013 Consumer Study into Australian Loyalty Programs published by Citrus & Directivity

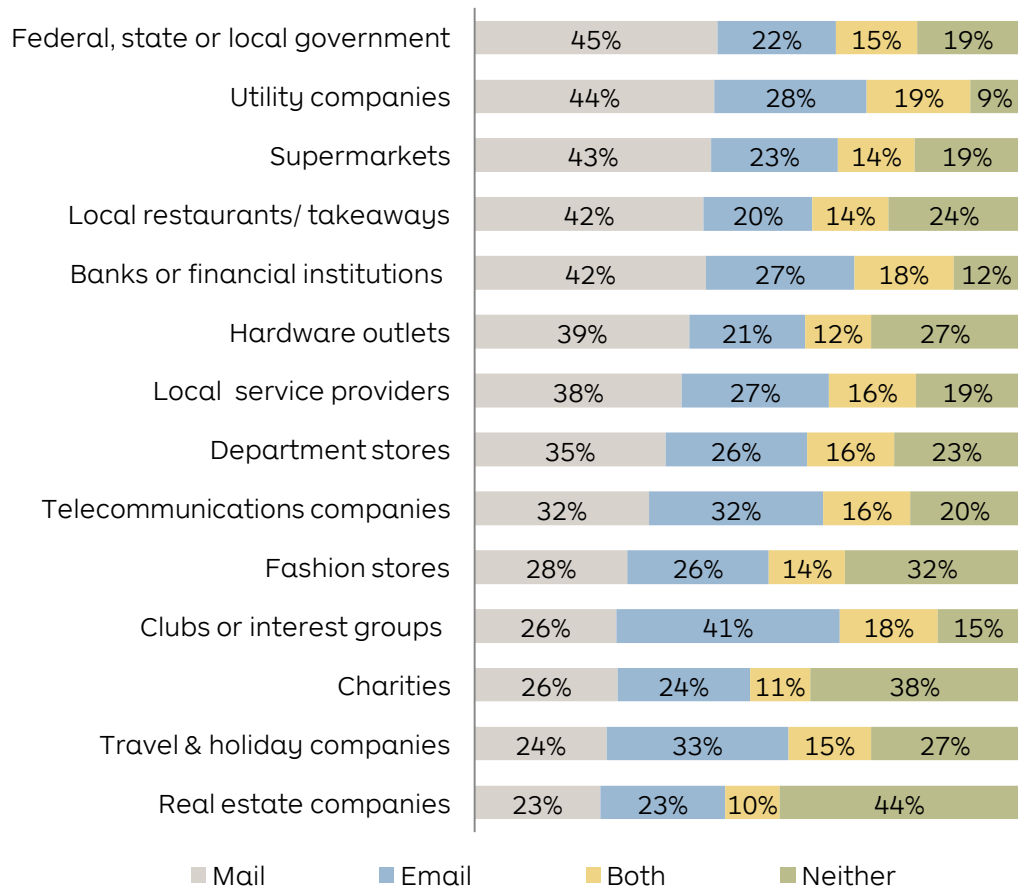
# Choice is equally important to existing customers

How would you prefer to receive advertising and promotional information from the following institutions when you are an existing customer of theirs?

Mail remains the preferred channel for communication from the majority of industries.

Preference for mail has increased over the past year, in particular with government (39% in 2012, to 44% in 2013), utility companies (40% to 44%) and banks & financial institutions (36% to 42%).

In addition, preference for both mail and email communication has increased across all sectors in the past year highlighting that existing customers also want the choice and convenience of multiple channels and both should be considered critical to your retention strategy.



# Thank you

To discuss how your business can benefit from including mail in your multi-channel marketing campaigns  
please visit [auspost.com.au](http://auspost.com.au) or call 13 11 18