

Australia Post Consumer Survey Mail Findings – January 2013



# 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 an existing customer of an organisation, an when no previous relationship exists. Respondents defined their own eligibility as a 'customer' or 'not a customer'.

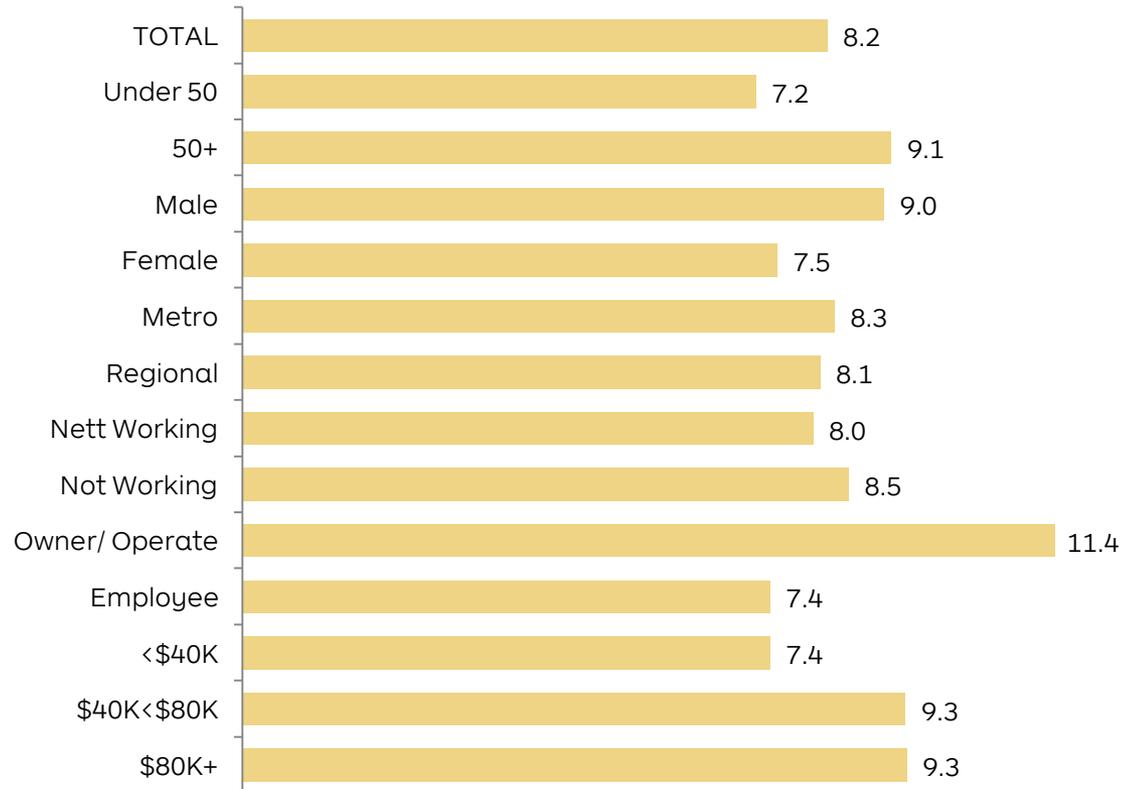
# The letterbox remains an uncluttered medium

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 8.2 items personally addressed to them in the one week. This is significantly higher than 6.9 the previous quarter.

Business owners, those aged 50+, males and households with higher incomes received more mail than others.

When thinking about the multitude of messages consumers are exposed to every day via email, television, daily newspaper, magazines and outdoor billboards, the letterbox as a channel has great potential when the message needs to stand out from the clutter.



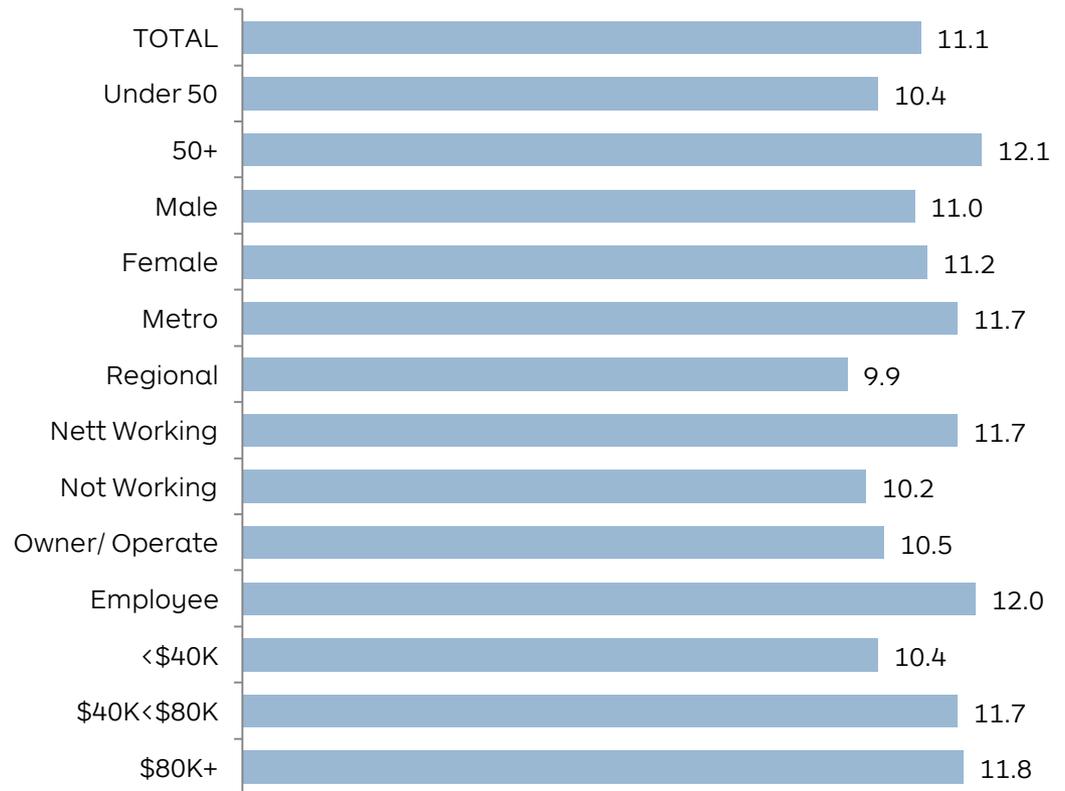
## The letterbox remains an uncluttered medium

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 11.1 unaddressed items at their household over one week, up from 9.5 in the previous survey.

Like addressed mail those aged 50 + reported receiving higher volumes of unaddressed mail than others. The most notable difference was that business owners receive more addressed mail than employees but reported receiving less unaddressed mail than employees.

This could be due to the majority of unaddressed mail reaching residential addresses, rather than business address points.

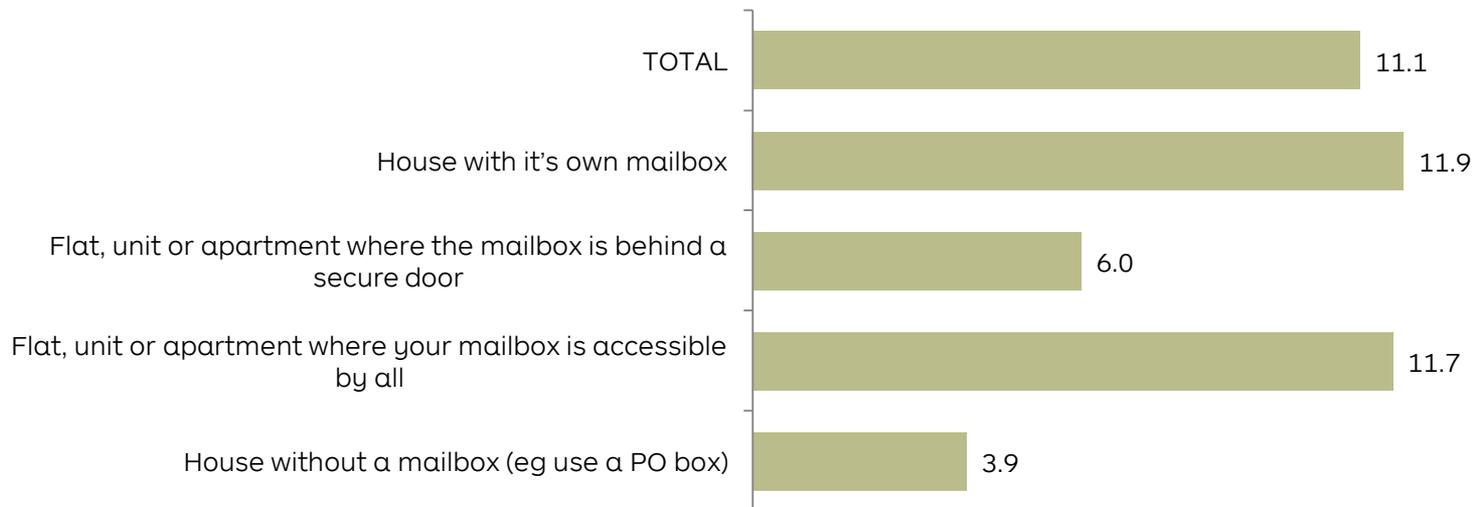


# The type of mailbox or access to that mailbox affects the amount of unaddressed mail received

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

Households with a mailbox as well as flats, units or apartments accessible by all have significantly more unaddressed mail than mailboxes with access behind a secure door or PO Boxes.

The fact that only Australia Post can deliver to flats, units and apartments where mailboxes are behind a secure door (posties are provided a key) and PO Boxes means that these types of mailboxes receive less mail.

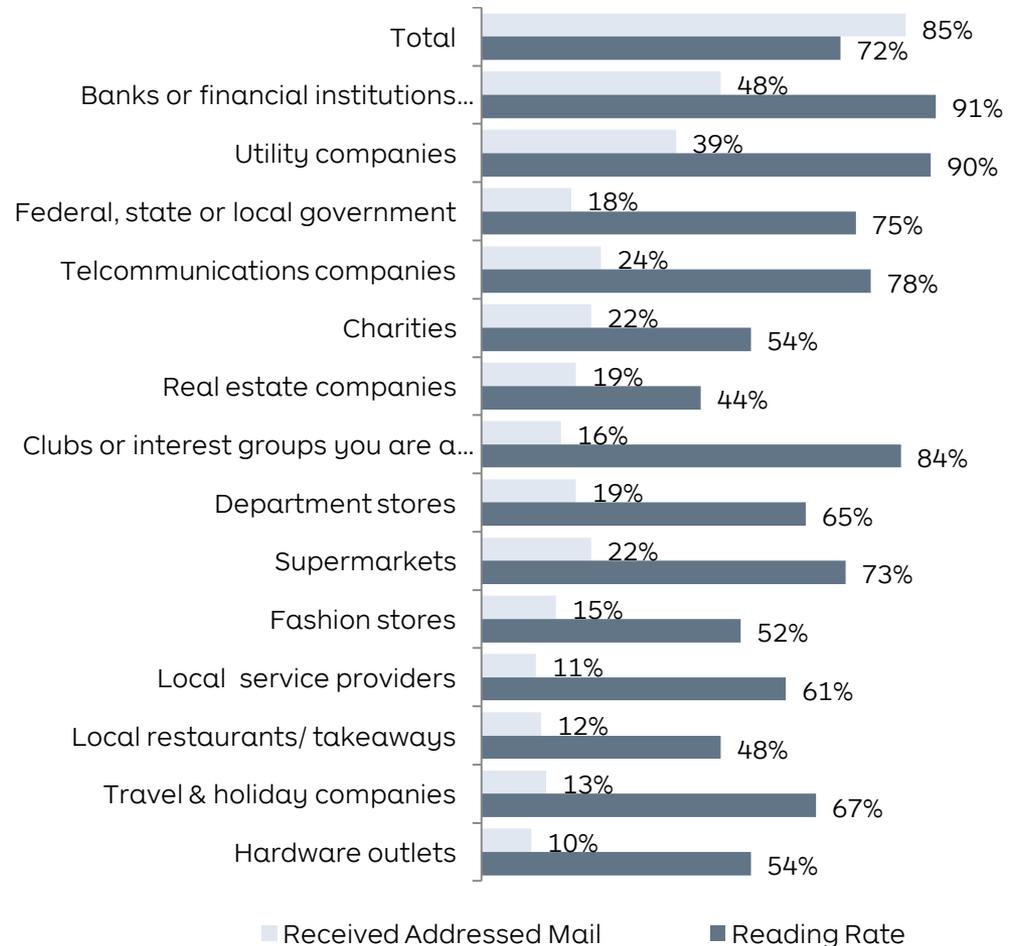


# While mail volumes remain steady readership is still high

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 supermarkets (up 6%), department stores and travel & holiday companies (both up 3%) from the previous quarter.

Importantly, Australian households read 72% of the addressed mail they receive. This is higher for banks/financial institutions (91%), utility companies (90%) and clubs or interest groups (84%).



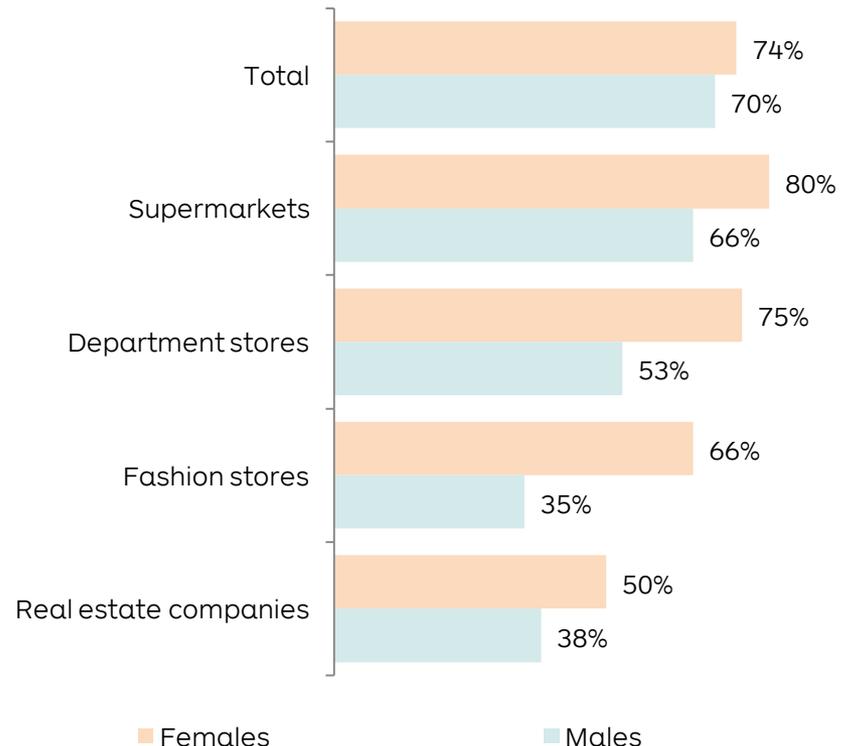
# Women are reading high volumes of mail across certain sectors

## Proportion of addressed mail received that was read

Overall, women (74%) are reading slightly more addressed mail than males (70%).

This gap is much higher in certain sectors such as supermarkets, department stores, fashion stores and real estate companies, where women are clearly reading much more addressed mail than males.

This highlights the need to communicate with specific individuals using channels they are consuming. For example - a fashion store could communicate with females by mail, but consider using an alternate channel such as email or SMS to communicate with males.



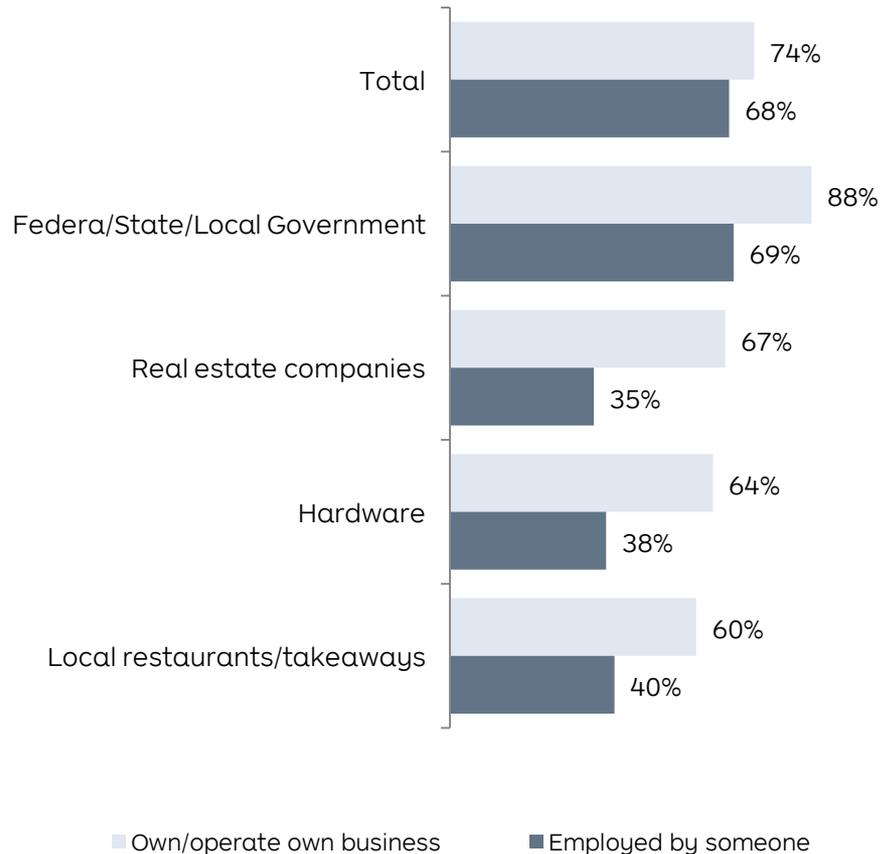
# Mail is an effective way to reach small business owners

## Proportion of addressed mail received that was read

Overall, 74% of the mail business owner/operators receive is read compared to 68% by employees.

Business owners/operators read much more mail than employees across government, real estate, hardware and local restaurants/takeaway sectors.

This is probably explained by the fact that these sectors are of importance to a business owner, ie. tradies would be more inclined to read mail from hardware companies and local takeaway outlets, and business owners would probably keep a pulse on the local real estate market.

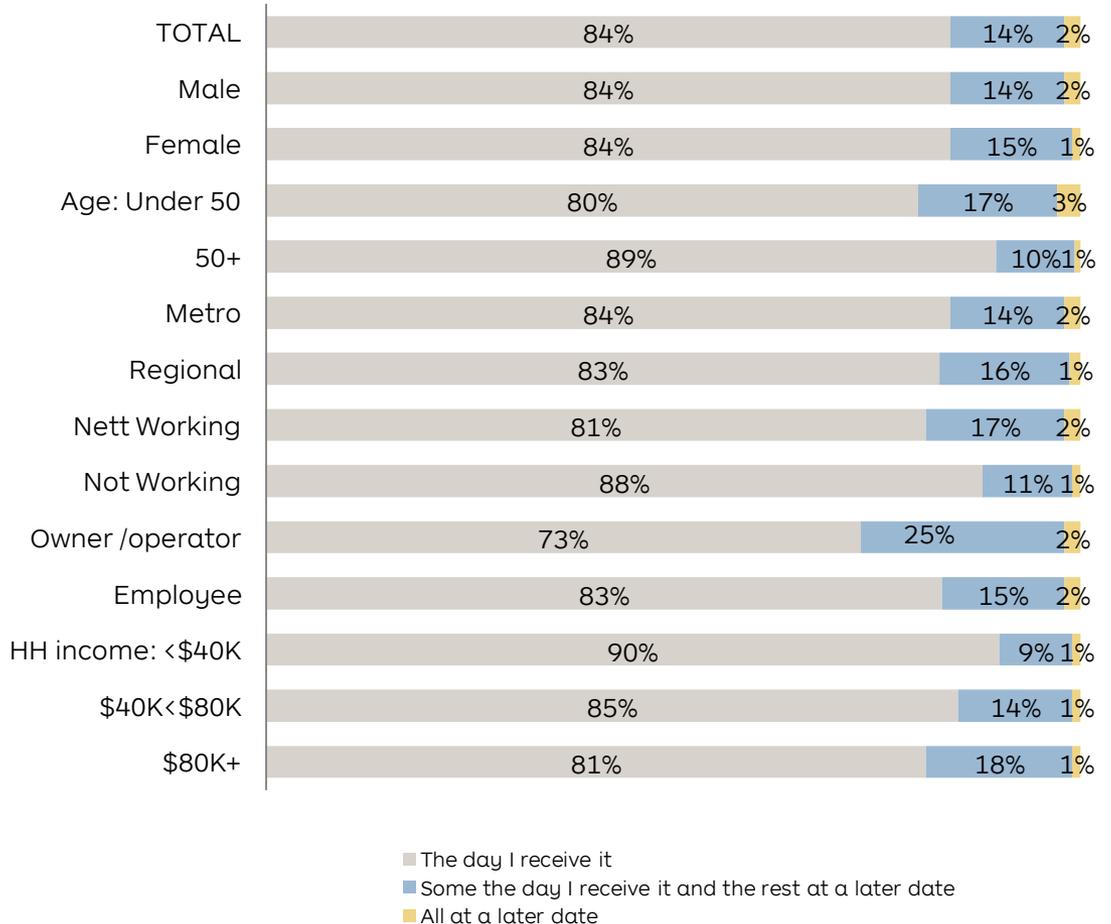


# Mail is primarily read on the day it is received

On average when do you usually read your mail?

Because consumers choose when they open their mail they are more likely to be engaged than with messages sent through other channels - they interact with mail when they want to.

The fact that 84% of people open their mail on the day it's received (up 3% on last quarter), illustrates that people are genuinely interested in opening and reading their mail. This is particularly prevalent for older people, unemployed and low income earners.



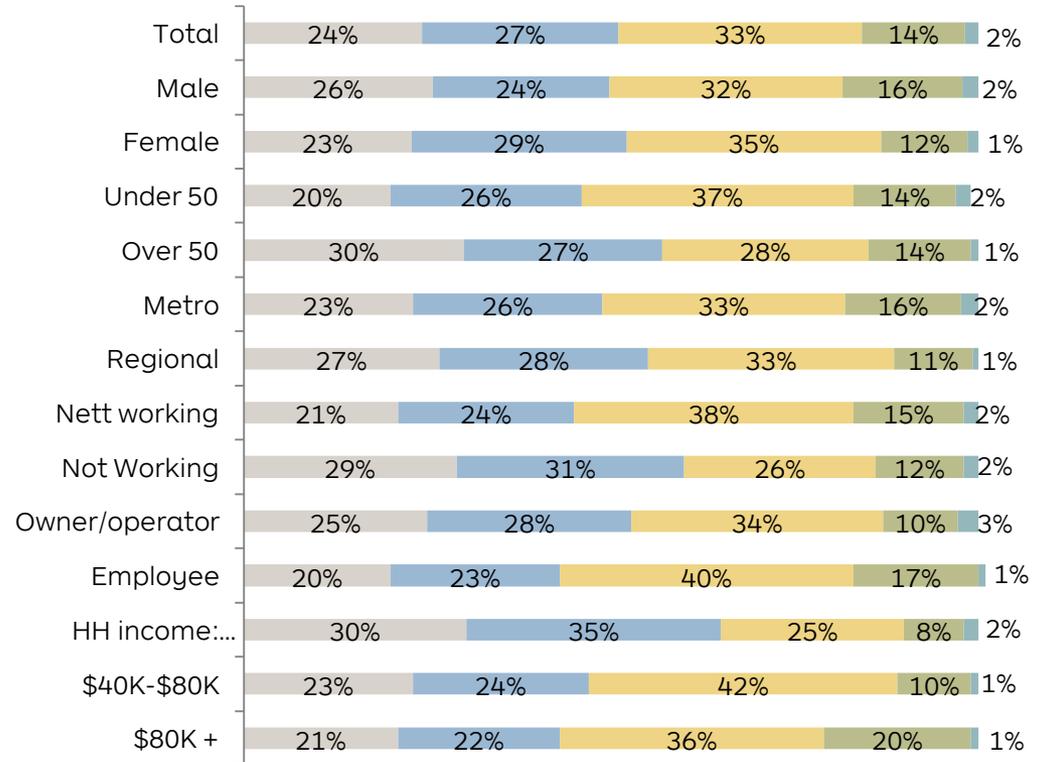
# Nearly all mail is opened, and a large majority stored for later reference

Please indicate your general behaviour when you receive your mail.

98% of people open their mail. The majority of people read it thoroughly (51%) and 60% store it for later reference.

These open rates are exceptionally high when you think about other channels such as email where the average open rate in Australia is 22%\*.

The fact that a large amount of mail is stored for later reference indicates that a mail piece has a relatively long life and may even be passed onto others giving it even greater reach.



- Open it, read it thoroughly
- Open it, read it thoroughly, and store it for later reference
- Open it, scan it for interest, and store it for later reference
- Open it, scan it for interest, but generally throw away
- Don't open it and throw away immediately

\*Source: Australian Email Marketing Benchmark Statistics, January 2013 by Brand Mail

# Significant time spent reading the mail demonstrates high levels of engagement

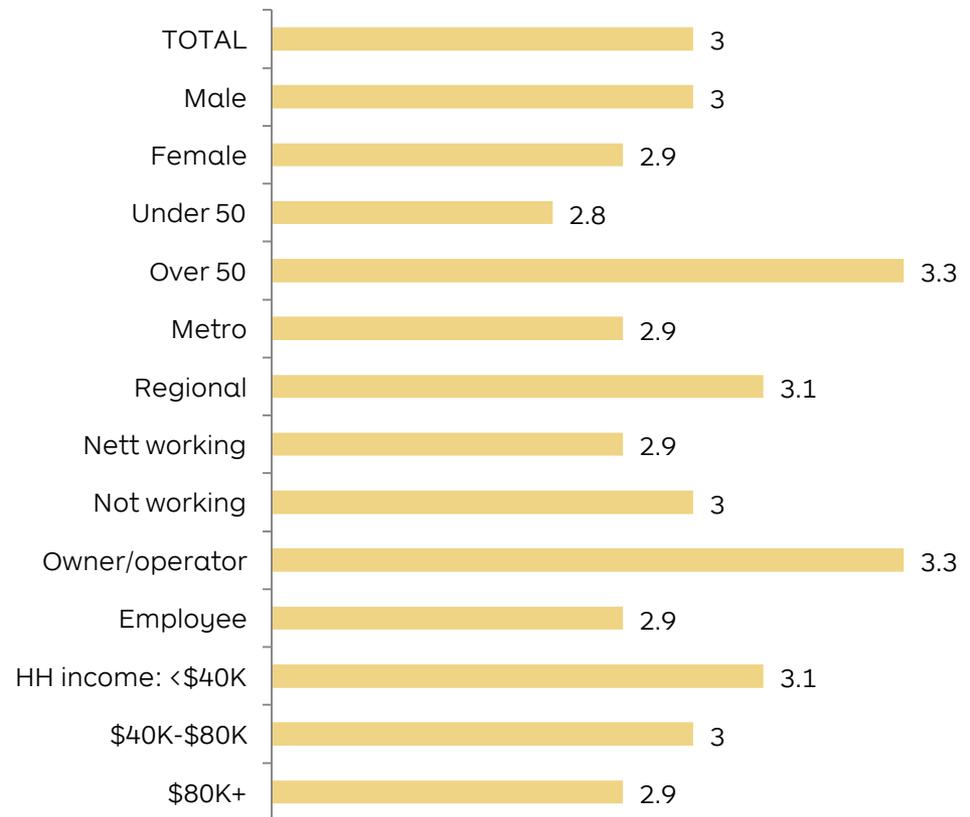
On average how long does it take you to open and read the mail you have delivered daily?

The average time spent opening and reading mail is 3.00 minutes, which is down from 3.42 last quarter.

While reading time decreased across all demographics, it still remains high and is a considerable amount of time to capture the recipients attention.

Readership time is higher for those aged 50 + and owner operators who spend up to 3.3 minutes reading their daily mail.

When you think about the limited time people consciously spend consuming advertising through other media and across multiple screens, this is a significant amount of time to be focused on a single message.



■ Average time spent opening and reading mail

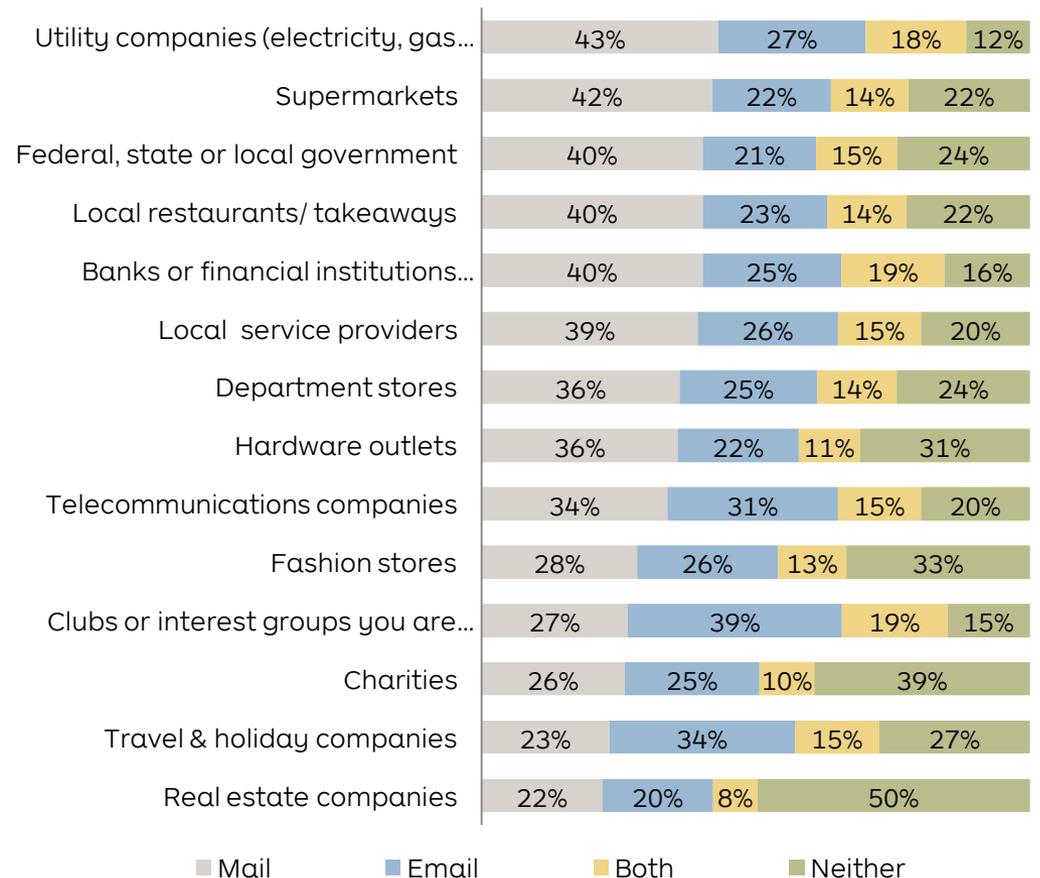
# A multi-channel approach is most suitable when communicating with existing customers

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

Mail is the preferred channel for receiving advertising and promotional messages when an existing customer across ten of 14 sectors.

While mail is still the preferred channel and increased by 1-2% across utilities, banks/financial institutions and telcos, email preference grew by 2 % across local restaurants/takeaways, local service providers, telcos, and 1% across hardware outlets and fashion stores.

These latest figures demonstrate that whilst most existing customers prefer to receive mail, using a multi channel approach will achieve the best possible results with all customers.



# Consumers still prefer to receive their bills & statements by mail

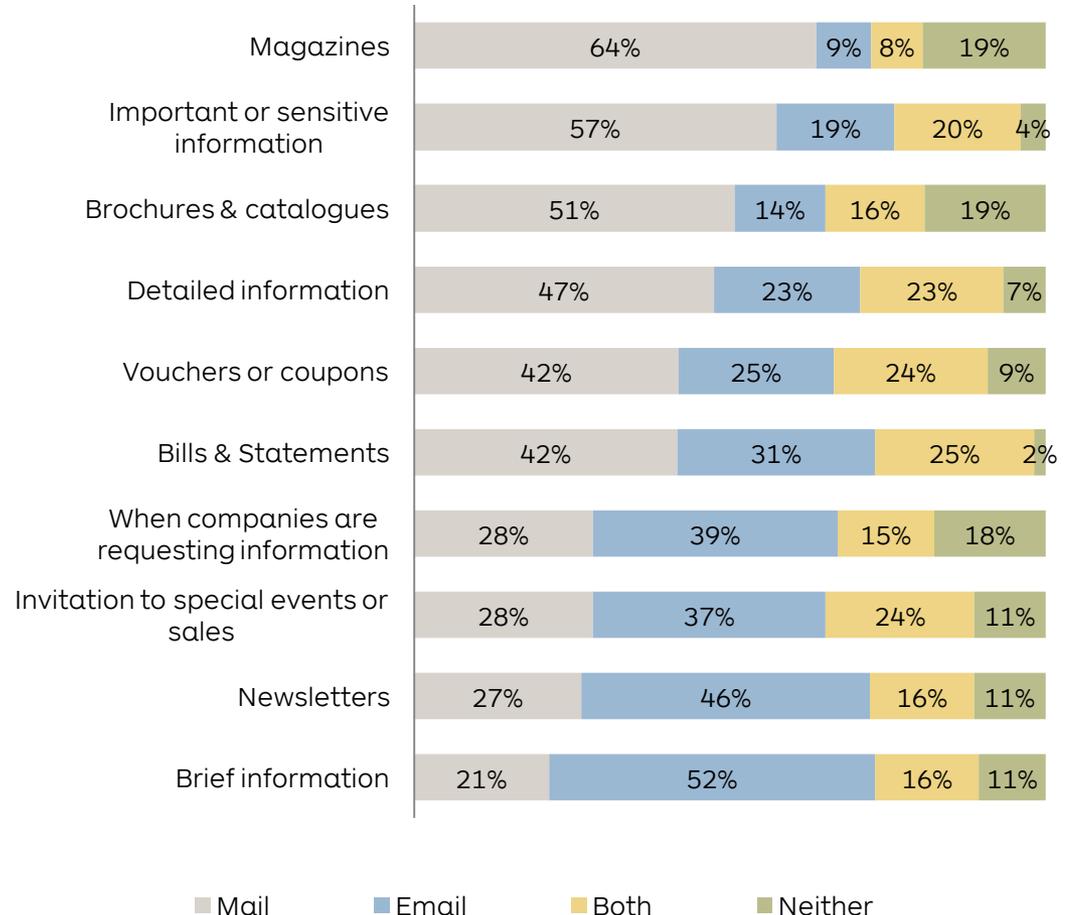
How would you prefer to receive the following types of communication?

Mail preference grew across all types of communication, while email preference decreased.

Most significantly preference to receive bills & statements grew by 4%, while email preference for this type of communication declined by 5%.

Email is only preferred for newsletters, invitations, when the information being received is brief, or when information has to be provided back to a company.

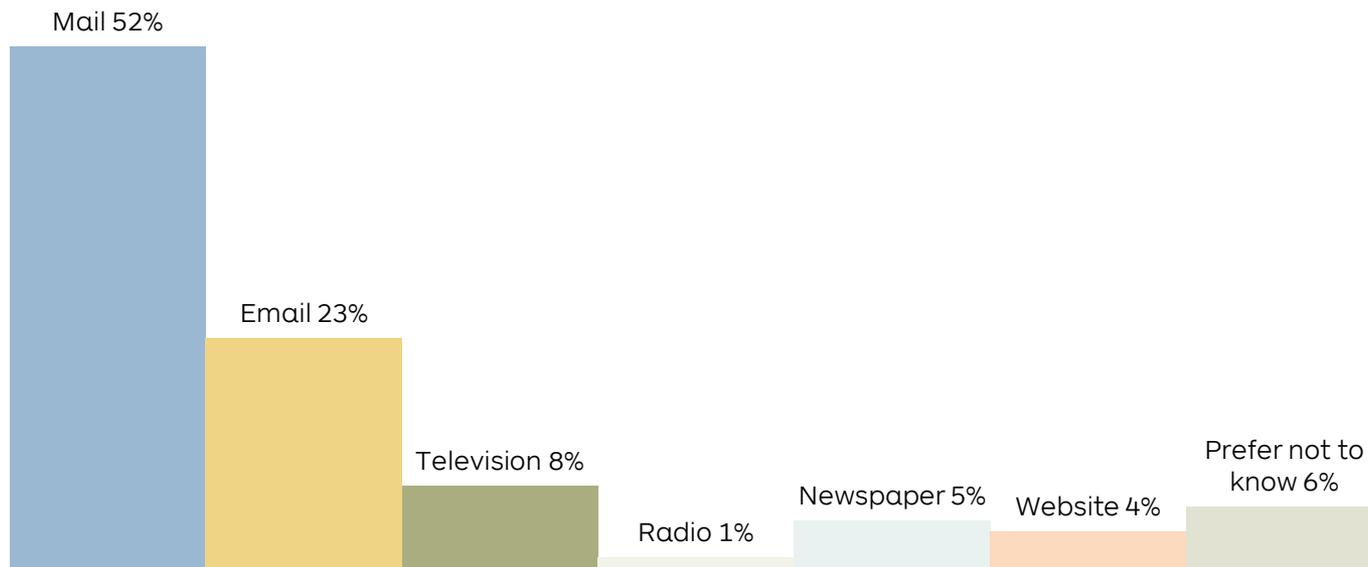
This demonstrates the speed to action ability of email however indicates that email only holds the audience's attention for a short time.



# When it comes to receiving communications from the government consumers overwhelmingly prefer mail

Thinking about government communications only (federal, state or local), how do you prefer to receive notice of policy/legislative changes that may affect you?

Mail is easily the preferred channel for receiving policy/legislative changes from government organisations, with email second and television the third preferred media channel by a long way.

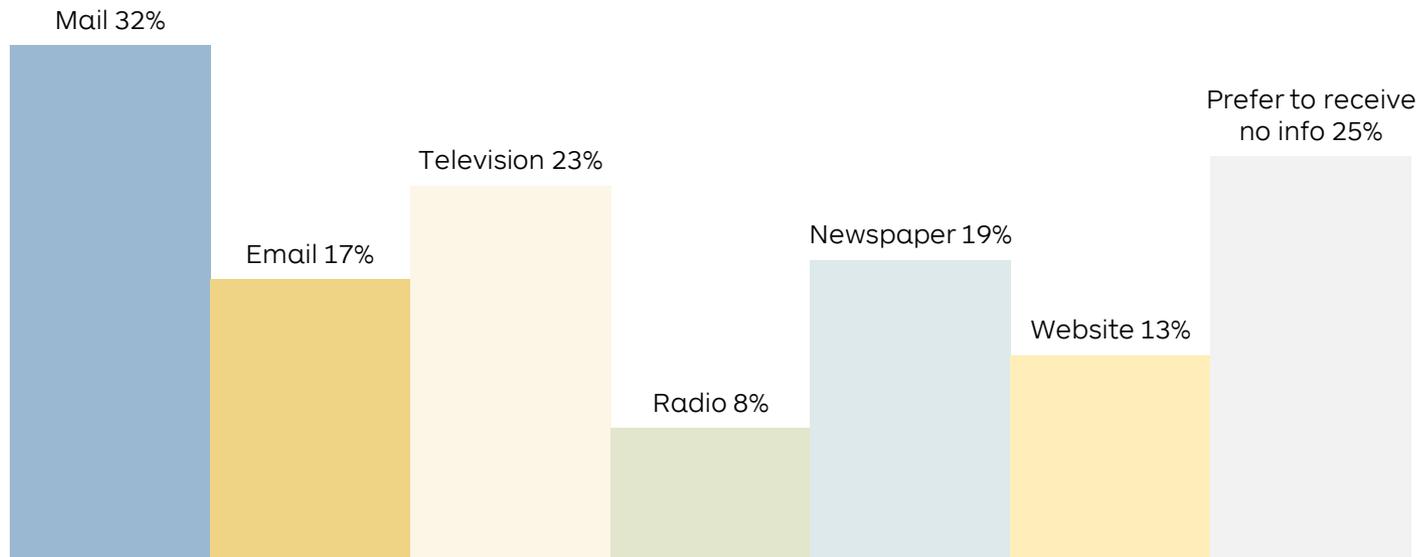


# And in the lead up to an election mail is the preferred channel for receiving a political parties messages

How would you like to be informed of political party's policies in the lead up to an election?

32% of people prefer to receive information from political parties in the lead up to an election by mail, with 25% of people preferring no information and 23% preferring to hear messages via the television.

This demonstrates that mail is still the most powerful channel for trying to solicit support in the lead up to an election



# Thank you

For further information, please contact:

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