

Better connections: Australian attitudes to mail and email

November 2013



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Methodology

Australian attitudes to mail and email is part of Australia Post's *Better connections* research series.

These reports are developed using data from various sources, including the Australia Post Consumer Survey. This survey, conducted each quarter, measures attitudes and behaviour of Australians towards different communication channels. Australia Post uses Quality Online Research (QOR) to compose a panel of respondents that best represents the Australian population in terms of age, gender and geographic location.

In November 2013, the Australia Post Consumer Survey looked at how much personally addressed mail and unaddressed mail participants receive and read, including examining responses to mail and email from specific industry sectors and types of information. This is based on recall of what has been received in the letterbox or inbox in the previous week.

In addition, respondents were asked to specify their channel preferences for receiving different types of messages across various industry sectors and transaction types. These preferences are differentiated according to whether the respondent is an existing customer or has no previous relationship with the organisation. Respondents define their own eligibility as a "customer" or "not a customer".

Data was also compared to the same survey 12 months previously, to identify any trends or changes.

Audience segments

Apart from analysing results according to age, gender, location and employment status, the following audience segments were identified within the total sample group:

	Youth	Under 25 years old.	Many university students or part-time workers.
	Younger professionals	No children.	Household income: \$50,000–\$150,000.
	Younger families	Dual-income household, with children under 10 years.	Household income: \$50,000– \$150,000.
	Older families	Dual-income household, with children over 10 years.	Household income: \$50,000– \$150,000.
	Home duties	Most likely to have young children.	Household income: under \$50,000.
	Older professionals	Over 40 years old.	Household income: \$150,000+.
	Retirees	Over 65 years old.	Household income: under \$50,000.

Executive summary

The findings from the November 2013 Australia Post Consumer Survey confirm that both mail and email channels have important roles to play in a multi-channel communications strategy. Australians say that the message should dictate the channel, preferring detailed information via mail and short-form messages via email.

While Australians are receiving slightly less personally addressed mail and unaddressed mail than a year ago, engagement remains high and a less-cluttered letterbox perhaps presents more opportunities for savvy marketers.

Here are 10 key findings that support these insights.



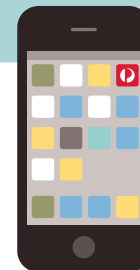
1

Australians received an average of **seven pieces** of personally addressed mail and **10.7 pieces** of unaddressed mail a week.



6

Australians wanted to receive **brief information**, newsletters, company requests for information and invitations to special events or sales via **email**.



2



85% of Australians **checked their mail daily** and **86%** read their mail on the **same day** they received it.

7



42% wanted to receive **bills and statements** as personally addressed mail; **33%** preferred **email format**.

3

The average time taken to open and read mail was **three minutes**.



8

People's preferences for physical mail versus email **hadn't changed** significantly since November 2012; there was no indication that people had shifted more towards digital communications or vice versa.

4

99% of Australians **opened their mail**. 58% also read it thoroughly, and 55% stored it for later reference.

9

Australians received the most personally addressed mail from **financial institutions, utilities companies** and **charities**.

5

Australians wanted to receive magazines, **important or sensitive information**, brochures and catalogues, detailed information and vouchers and coupons as **physical mail**.



10

Australians were most likely to **read personally addressed mail** from **financial institutions, utilities companies** and **clubs or interest groups** of which they are a member.

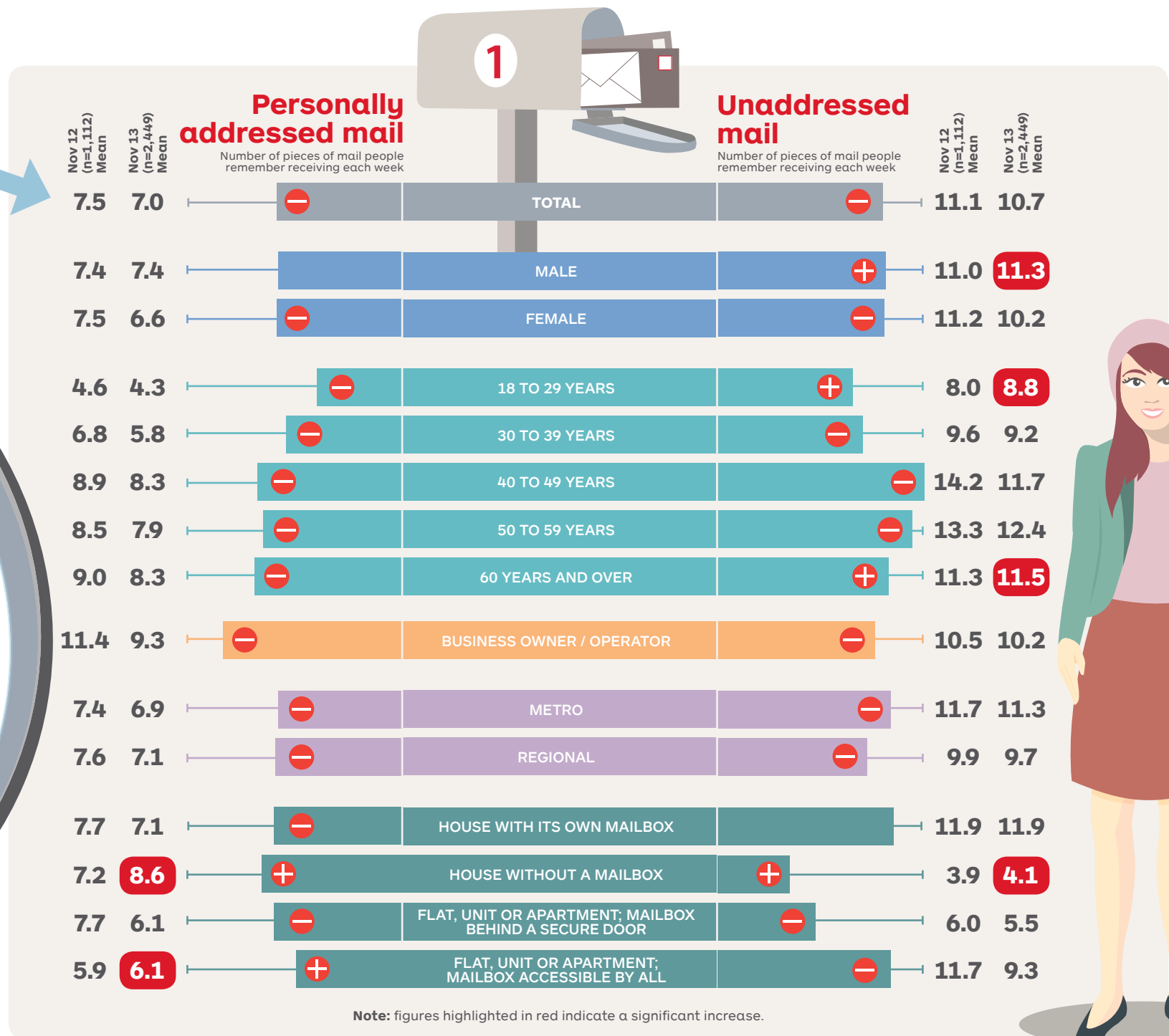


Australians received an average of seven pieces of personally addressed mail a week in November 2013, compared with 7.5 pieces in November 2012.

Mail findings

Overall, Australians received **slightly less mail** in November 2013, compared with November 2012. This is consistent with a drop in media spend on personalised direct mail: according to the 2012/2013 Annual Catalogue Industry Report, investment in personalised direct mail dropped by 26%.

For example, Australians received an average of **10.7 pieces** of unaddressed mail a week in November 2013, compared with **11.1 pieces** in November 2012.

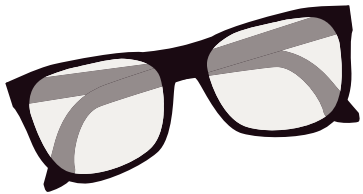
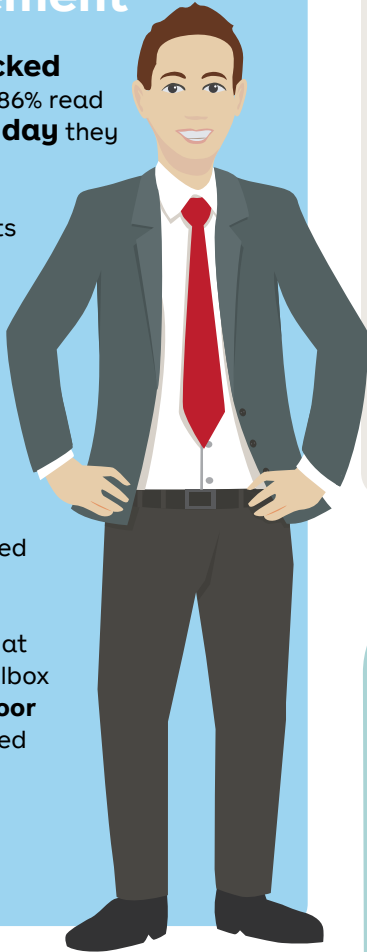


Mail delivers urgency and engagement

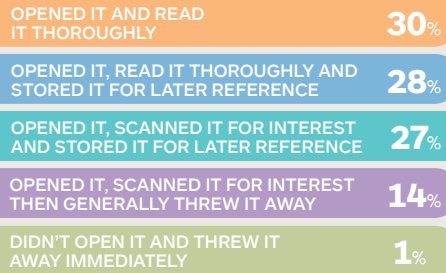
85% of Australians **checked their mail daily** and 86% read their mail on the **same day** they received it.

Some audience segments were **more likely to check their mail** daily in November 2013 compared with November 2012. These groups included:

- **Younger professionals** (78% in 2013, compared with 66% in 2012)
- People who live in a flat or unit where the mailbox is **behind a secure door** (75% in 2013, compared with 69% in 2012).



The average time taken to open and read mail was **three minutes.**



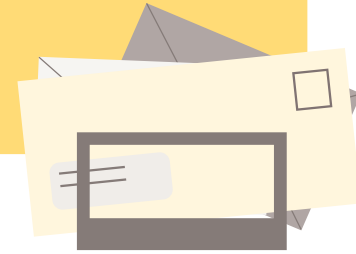
Unlike channels such as TV and radio, personally addressed mail can not only be **consumed in your own time**, it can also be stored for later reference. This explains why it's still the **preferred channel** for detailed, important and sensitive information (highlighted right).

Many Australians are reading their mail more thoroughly

The following groups were more likely to read their personally addressed mail more thoroughly in November 2013:

- **Females** (30%, up 7%)
- **All age groups**, except 50–59 year olds
- **Younger families** (24%, up 14%)
- **Business owners** (34%, up 9%)
- People in **metro areas** (31%, up 8%).

Personally addressed mail offers good cut-through and engagement. **99% of Australians opened their mail**, with 58% reading it thoroughly and 55% storing it for later reference.



Sectors sending personally addressed mail

Australians received the most personally addressed mail from **financial institutions; utilities companies; charities; telecommunications companies; federal, state or local government; and supermarkets.**

Base: Those who received addressed mail in the last week.

		Nov 12 (n=1,007) %	Nov 13 (n=2,220) %	Change %
1	BANKS OR FINANCIAL INSTITUTIONS, INCLUDING CREDIT CARD AND INSURANCE +	48%	54%	6%
2	UTILITIES COMPANIES (ELECTRICITY, GAS OR WATER)	39%	39%	0%
3	CHARITIES +	22%	30%	8%
4	TELECOMMUNICATIONS COMPANIES +	24%	25%	1%
5	FEDERAL, STATE OR LOCAL GOVERNMENT +	18%	21%	3%

Note: figures highlighted in red indicate a significant increase.

4 industries getting high mail engagement

1 Financial institution communications are a must-read

Not only did Australians receive **more personally addressed mail** from financial institutions, **91%** of Australians who received mail from a financial institution read it.

2 More Australians are receiving mail from charities

In November 2013, **30%** of Australians received personally addressed mail from charities, up from 22% in 2012. **61%** of Australians who received personally addressed mail from a charity read it. This is a **significant increase** from the 54% of Australians who read mail from charities in November 2012.



3 Supermarkets get a great deal

Australians received **almost the same amount** of personally addressed mail from supermarkets in 2013 as they did in 2012, and **78%** of Australians read these communications: 5% higher than in 2012.



4 Fashion stores are back in style

Australians received almost the same amount of personally addressed mail from fashion stores, but readership increased from 52% in 2012 to **63%** in 2013. **Youth** (68%, up 22%) and **older professionals** (69%, up 25%) were more likely to read fashion mail in November 2013.



Although females (72%) were more likely than males (49%) to read personally addressed mail from fashion stores, **male readership has risen** compared with November 2012, where readership was 35%.

Mail Australians are most likely to read

Australians were most likely to read personally addressed mail from a **financial institution; utilities provider; club or interest group; supermarket; and federal, state or local government.**

Base: Those who read mail in the last week from that particular category.

		Nov 12 (n=857) %	Nov 13 (n=1,945) %	Change %
1	BANKS OR FINANCIAL INSTITUTIONS, INCLUDING CREDIT CARD AND INSURANCE	91%	91%	0%
2	UTILITIES COMPANIES (ELECTRICITY, GAS OR WATER) +	90%	91%	1%
3	CLUBS OR INTEREST GROUPS -	84%	83%	-1%
4	SUPERMARKETS +	73%	78%	5%
5	FEDERAL, STATE OR LOCAL GOVERNMENT +	75%	77%	2%

Note: figure highlighted in red indicates a significant increase.

Channel preferences across information type and industry

Top 3 for personally addressed mail

Customers prefer to receive personally addressed mail from **utilities providers; federal, state and local government; and financial institutions.**



A larger number of existing customers / members of **utilities providers, financial institutions, clubs or interest groups, local service providers and travel and holiday companies** preferred to receive **both mail and email** correspondence, highlighting the need for a multi-channel marketing mix.

Top 3 for email

Customers prefer to receive email from **clubs and interest groups** of which they are a member; **telecommunications companies** and **travel and holiday companies.**

The message dictates the channel preference

While technology is making digital channels ever more accessible to Australians, the **preferences for physical mail versus email didn't change significantly** between November 2012 and November 2013.

42% preferred to receive **bills and statements** as personally addressed mail; 33% preferred email format.

Australians preferred personally addressed mail for:

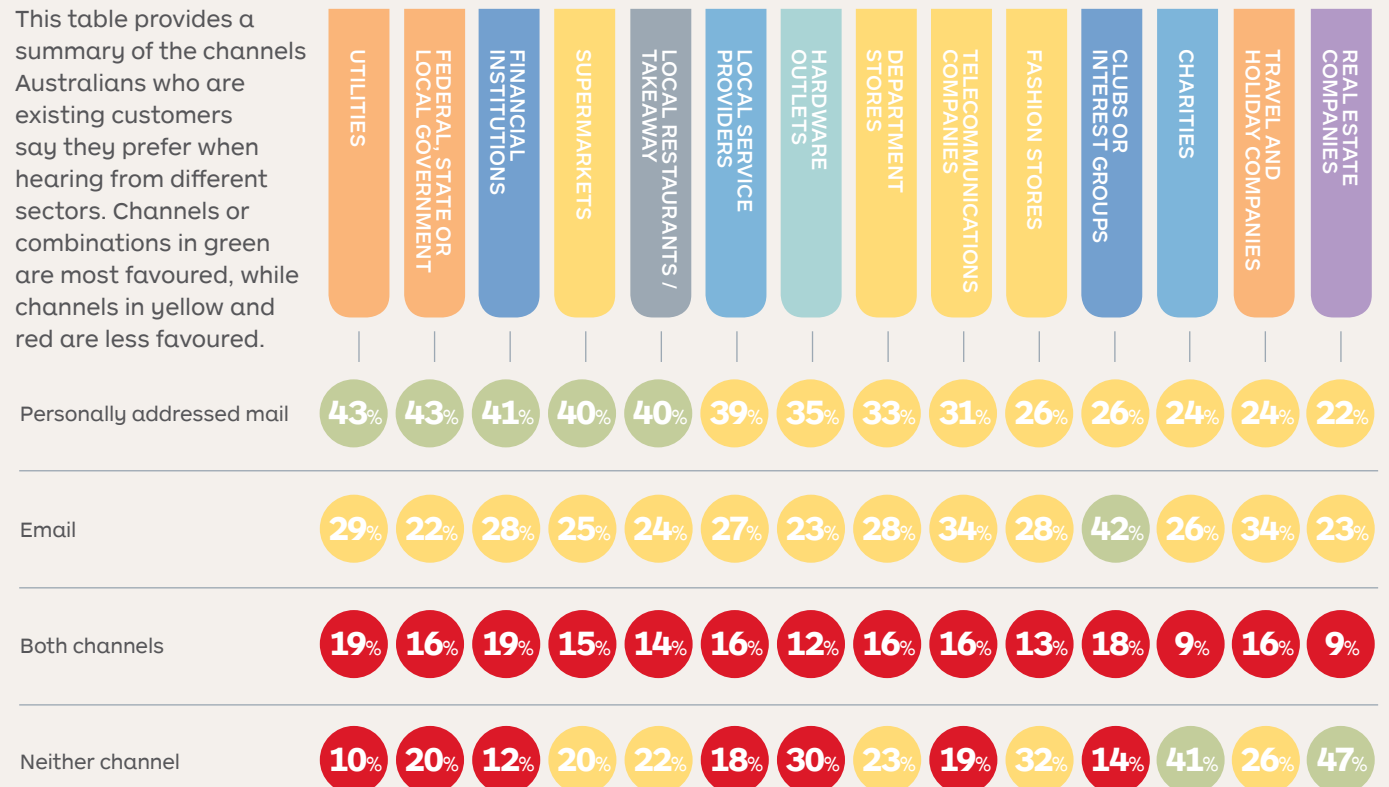
- 1 **Magazines** (64%)
- 2 **Important or sensitive information** (57%)
- 3 **Brochures and catalogues** (52%).

Australians preferred email for:

- 1 **Brief information** (54%)
- 2 **Newsletters** (46%)
- 3 **Company requests for information** (39%).

Channels customers prefer different industries to use

This table provides a summary of the channels Australians who are existing customers say they prefer when hearing from different sectors. Channels or combinations in green are most favoured, while channels in yellow and red are less favoured.



Australian attitudes to mail and email is part of Australia Post's *Better connections* series. These reports are released on a quarterly basis and are available to download at **auspost.com.au/betterconnections**.

The Association for Data-driven Marketing (ADMA) and Australia Post have also conducted additional research on advertising channel preferences in different industries. To find out more about the advertising channels Australians consider most useful, **download your free copies of these industry-specific reports at: auspost.com.au/creatingconnections**.

