

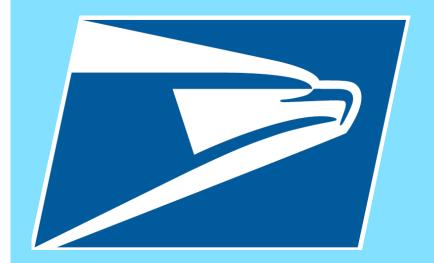
COVID Mail Attitudes

Understanding & Impact

Doug Wiggins Market Research & Insights April 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

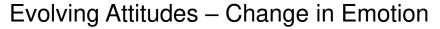


Methodology

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

Findings

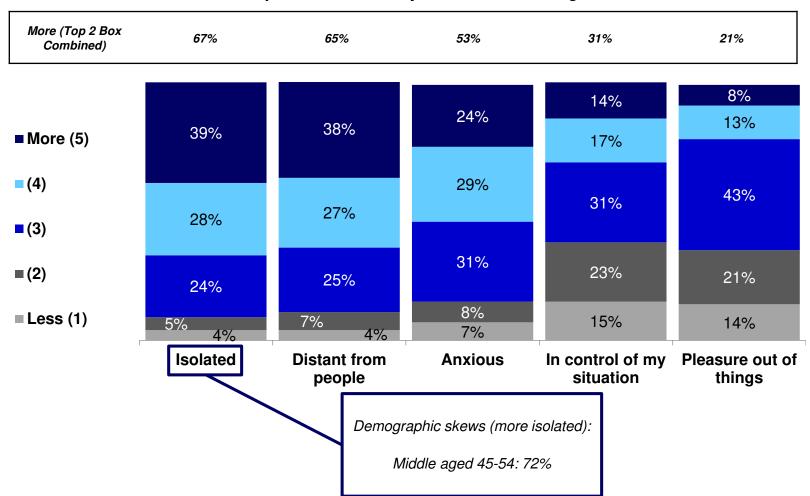
- > Consumers are feeling increasingly isolated and distant from people.
- > Two-thirds have/would send mail, with family and friends the most common recipients.
- The majority (65%) want to support USPS during this time and agree that receiving mail lifts their spirits (65%). Mail is extra special during this time of social distancing (61%). Respondents feel they can feel more connected to people through the mail (54%)



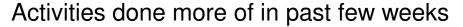


Consumers are feeling increasingly isolated and distant from people.

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



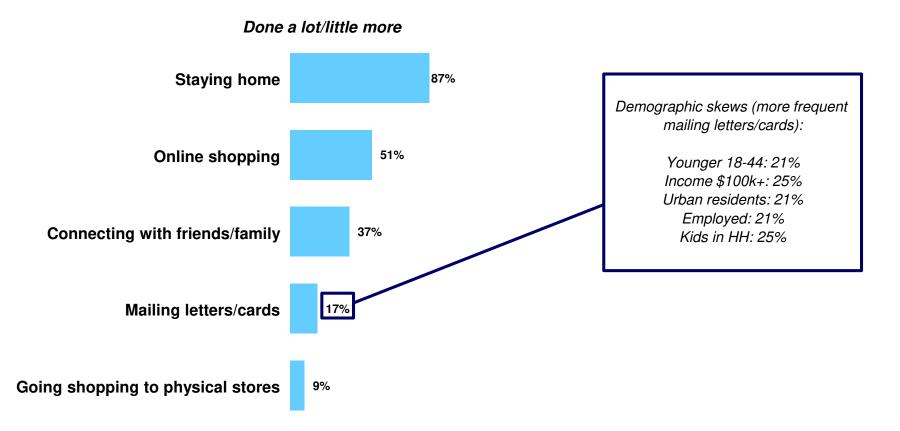
Base: Total (1004)





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, in the past few weeks?



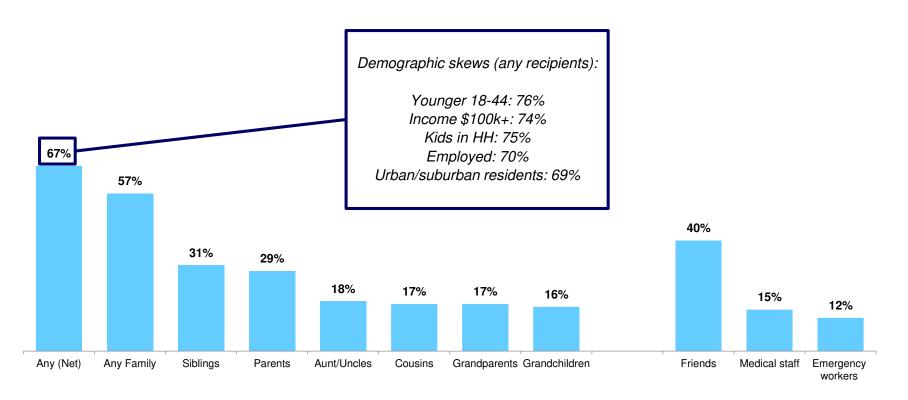
Base: Total (1004)





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?



Base: Total (1004)



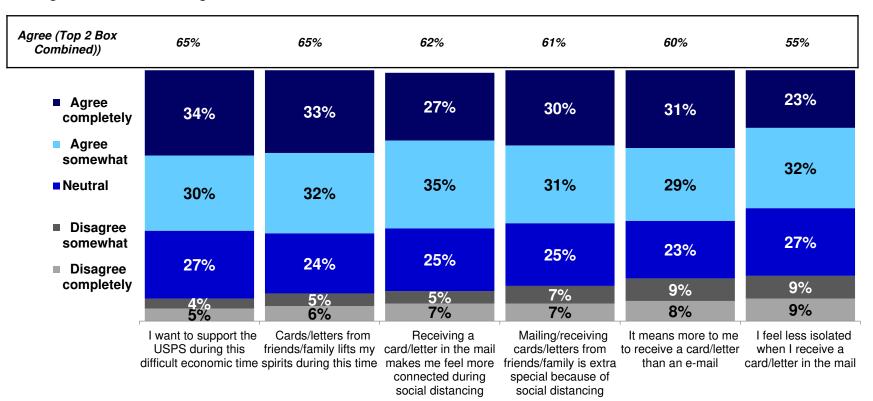




The majority want to support USPS during this time and agree that receiving mail lifts their spirits. Mail is extra special during this time of social distancing.

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?



Base: Total (1004)

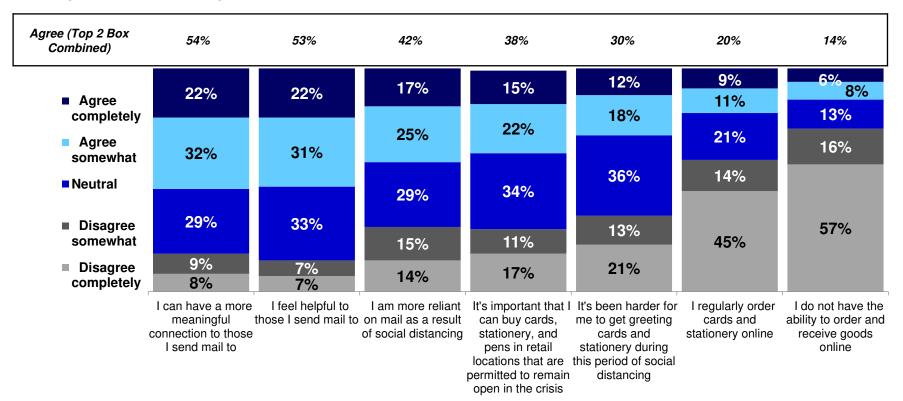
Attitudes/Experiences



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?



Base: Total (1004)