

Reaching Consumers in the Information Age

*How Australian consumers
prefer organisations to
communicate with them*



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Executive summary

Why this research is important

The information age has heralded new challenges for business. Ever-evolving technology has given consumers unprecedented access to information on products and services. Globalisation has extended the market place. Businesses are no longer competing with the company up the road but also others in the next town, state and even around the world. All this has empowered the shopper, not only in terms of a greater offering but also in the ability to make more informed purchasing decisions.

The introduction of new media has presented a plethora of marketing channels. However, it also carries the risk of information overload, with consumers inundated at every opportunity.

While media options have increased, population and marketing budgets have not grown by comparison. At the same time, niche markets are becoming the rule rather than the exception. Add to these, consumer movements, which are becoming increasingly difficult to predict, and allocating media spend to achieve effective reach and frequency is a challenge in itself these days.

With fragmented media, some marketers are second-guessing their channel selection. Worse still, some are rationalising their choice of media based on what seems easiest for the business to facilitate, rather than considering how consumers wish to receive marketing messages. This in itself is contrary to the consumer-centric environment in which businesses operate.

For this reason, Australia Post felt it was time to ask consumers about their media preferences and commissioned the task to research company, TNS Australia, the world's third-largest marketing information company.

This research was designed to look beyond media consumption patterns and delve more deeply into consumer preference. When researching media consumption, you always run the risk of simply producing a picture that reflects how we in the marketing industry believe consumers are best reached. It was felt that asking consumers which channels they prefer for different kinds of communication might produce a different picture – and one that could lead to some powerful insights for marketers keen to maximise returns on their media investments.

The research examined shifts in preference depending upon the type of organisation sending the communication, across various kinds of commercial enterprises, along with not-for-profit and political organisations. It also looked in detail at any discernible differences accounted for by the type of communication being sent, as well as the demographics, income and geographic location of the recipients.

To provide the most conclusive information, the study considered all the major communications channels currently available.

This research used both qualitative and quantitative techniques. At the same time, the survey also identified any representative demographic, income or geographic patterns. The result is extensive analysis that speaks for itself.

Here are the findings in brief.



Consumers have clear media preferences

The consumers surveyed clearly prefer certain media for receiving particular kinds of information. This applies whether it's information about the organisation itself or data of a transactional nature pertaining to the company/consumer relationship. The preference varies depending on whether the consumer is a customer or non-customer.

As with any research, some findings are to be expected. For example, it should come as no surprise that the research indicates that TV is the preferred medium for receiving new product announcements. Nor should it be surprising that consumers prefer personally addressed mail for transactional or administrative information such as bills, statements, annual reports, loyalty programme details and the like. While some of the research supports what many marketers would assume to be the case, the survey also enlightens us as outlined below.

For advertising and promotional messages

An interesting finding from the study is that marginally more people prefer to receive advertising and promotional messages through personally addressed mail than through television, newspapers or magazines. The qualitative phase of the research exercise indicated that consumers understand and appreciate that personally addressed mail is able to achieve a consistent degree of relevance that is not possible through mass media.

The research also found that often mail is shared with other people in the household, which is particularly pertinent to those purchases where more than one decision-maker is involved. What's more, an equally high number of respondents kept the information to read later.

These findings apply irrespective of whether the consumer has a relationship with the organisation or not. In fact, as you will see on page 64, the research shows that 70% of consumers do not care who mails them information as long as it is relevant. This bodes well for prospecting and encourages companies to target recipients more precisely when looking for potential customers. Very simply, success comes to those organisations that invest in analysing, targeting and devising meaningful messages.

Electronic or physical communications

Another significant finding relates to the consumers' penchant for paper-based communications, despite predictions to the contrary. Irrespective of how many people have access to the Internet or how comfortable they are using it, the popularity of paper remains very high. For instance, even though more than half the people surveyed have access to the Internet and receive e-mail from organisations, the overwhelming majority still want to receive their bills in the post. This could be because the mail offers a permanent record or that it is just easier and quicker to receive the bill in physical format. This is supported by findings that show that nearly half of those who receive bills by e-mail still feel the need to print them.

Communicating with customers

Customers of several types of organisations not only prefer but expect organisations to send information to them by personally addressed mail. Again, the qualitative phase of the research suggested that this is driven by consumer demands for relevance – something you would expect from an organisation of which you are a customer. There was no mention of discomfort around data being held by companies the consumer dealt with, suggesting that the legal and best practice privacy guidelines have created an atmosphere of trust amongst consumers.

There are some exceptions to the preference amongst customers for personalised direct mail. In the retailing and travel sectors, unaddressed catalogues are the preferred channel, while for automotive manufacturers and retailers, newspapers come marginally ahead of personally addressed mail. This perhaps indicates an opportunity for these sectors to build more personal relationships with their customers.

Variations by industry

Just as findings vary according to the types of messages being received, they are also affected by the kinds of industries. Even so, Internet and e-mail are not yet registering as preferred media for receiving information from organisations. In fact, it is evident that only a minority of those surveyed who have e-mail access prefer to receive messages by electronic media. This was perhaps surprising in some industries, given the vast investments many have made in facilitating a web and electronic media presence. What's more, across all industries, electronic media is among the least popular, irrespective of whether or not the recipient is a customer of the organisation.



Glossary of terms

The following expressions, used throughout this document, are taken to mean the following:

Consumer

An individual, who may or may not be a customer of an organisation. The universe for this research, comprising 1,001 Australian consumers, was split into two groups, one group being asked their opinion of organisations when they were a customer and the other group asked about their opinions when they were not a customer.

Personally addressed mail

Mail personally addressed to the recipient from an organisation with which the recipient may or may not have a relationship.

Direct mail

A subset of the above definition, describing personally addressed mail that relates solely to advertising or promotional information.

Unaddressed mail

Unaddressed advertising or promotional information from organisations the consumer may or may not know. The item may be sealed in an envelope but will not carry the recipient's name or address.

Addressed catalogues

Addressed advertising material in a catalogue format from organisations with which the consumer may or may not have a relationship.

Unaddressed catalogues

Unaddressed advertising material in a catalogue format from organisations with which the consumer may or may not have a relationship.

E-mail

E-mail received by consumers at home or at work from organisations they may or may not know, sent to them as consumers (i.e., not private or business correspondence).

SMS

Short Messaging Service (text messages), received by consumers on their mobile phones from organisations with which the recipient may or may not have a relationship.

Other Media

Media other than those identified specifically, including ambient media such as billboards, bus and public vehicle advertising, etc.

TNS Australia

The international research company that carried out all sample frame creation, fieldwork and results collation for this research. TNS is the world's third-largest marketing information company.

Qualitative research

The 'why' approach to research that seeks to understand the attitudes of individuals that make up a market segment.

Quantitative research

The 'how' approach to research, that seeks to understand the relative size and number of individuals that make up a market segment.

Research approach

Research structure

The structure of the research was developed to explore customer and non-customer preferences across a broad range of media and industries. (Please see Introduction on page 7 for a list of these industry segments.)

It included a variety of communication types with a focus on advertising and promotional messages, aiming to provide practical information to aid marketers when selecting media for their campaign planning.

Participants

The qualitative component of the research consisted of six focus groups differentiated by metropolitan and regional area as well as age group (18-30, 31-45 and 46-60 years of age).

The group situation provided a suitable environment for responding to stimulus material and a range of associative techniques to understand attitudes and responses to different channels of communication delivery.

Each group contained between six and eight participants and took one-and-a-half hours to conduct.

The quantitative component of the research consisted of 1,001 telephone interviews with the person in the household who was either totally or mainly responsible for receiving and opening household mail.

The sample frame consisted of household telephone numbers, selected at random from the Telstra White Pages® in every regional, rural and metropolitan area within Australia.

All interviews were conducted from the TNS Australia call centre in Melbourne, Victoria between 16 July and 28 July 2003.

Numbers of interviews by state are illustrated in the table below.

n=1,001 x 22-minute CATI interviews	
VIC	200
NSW/ACT	200
QLD	201
SA/NT	150
WA	150
TAS	100
Total Interviews	1,001

Questionnaire

The quantitative questionnaire was developed based on the main findings of the qualitative stage, combining the language and definitions used by consumers to describe the mail and other media.



Introduction

This report examines the media preferences of Australian consumers across the entire spectrum of business communications, from marketing and promotional material through to administrative information.

The insights were compiled from responses the surveyed consumers gave when asked about their preferred media. These findings will give businesses an in-depth understanding of how best to communicate with consumers, including when and how often contact should be made.

Given the importance of marketing and promotional communications in generating business revenue, the report should assist in allocating spend more effectively

to achieve the greatest return on investment. At the same time, the findings for essential communications should be invaluable, not only in terms of accounting and billing for consistent cash flow but also with regard to reporting in a way that is conducive to good customer relations.

The consumer responses gathered for this analysis relate to communications from a range of industries including the service and retail sectors, clubs, not-for-profit organisations and government bodies. It also records demographic data to further assist businesses in devising the most appropriate communication strategies for the many and varied market segments. The areas covered by the research are outlined on the following pages with the corresponding page references.

The findings

Preferred media for receiving business communications – customers

Marketing and Promotional	Page	Essential Summary	Page
Summary	12	Summary	18
Advertising and promotional	13	Bills	19
Loyalty programmes	13	Financial accounts or statements	19
Club/membership newsletters	14	Annual reports	20
New product announcements	14	Changes to terms and conditions	20
Invitations to special events or sales	15	Preferred frequency of communication	21
News or updates	15		
Preferred frequency of communication	16		

Preferred media for receiving marketing communications by industry – customers and non-customers

Service Sector		Real estate firms	
Summary		Customers	32
Customers	24	Demographics	32
Non-customers	25	Non-customers	33
		Demographics	33
Banks and financial institutions		Travel organisations	
Customers	26	Customers	34
Demographics	26	Demographics	34
Non-customers	27	Non-customers	35
Demographics	27	Demographics	35
Telecommunication companies		Restaurants	
Customers	28	Customers	36
Demographics	28	Demographics	36
Non-customers	29	Non-customers	37
Demographics	29	Demographics	37
Utility providers			
Customers	30		
Demographics	30		
Non-customers	31		
Demographics	31		

Preferred media for receiving marketing communications by industry – customers and non-customers

Retail Sector	Page	Not-for-profit, government and clubs	Page
Summary		Summary	
Customers	40	Supporters/members	56
Non-customers	41	Non-supporters/non-members	57
Retailers overall		Charities	
Customers	42	Supporters/members	58
Demographics	42	Demographics	58
Non-customers	43	Non-supporters/non-members	59
Demographics	43	Demographics	59
Supermarkets		Political parties	
Customers	44	Supporters/members	60
Demographics	44	Demographics	60
Non-customers	45	Non-supporters/non-members	61
Demographics	45	Demographics	61
Department stores		Clubs	
Customers	46	Supporters/members	62
Demographics	46	Demographics	62
Non-customers	47	Non-supporters/non-members	63
Demographics	47	Demographics	63
Fashion stores		<i>Consumer perceptions of direct mail</i>	
Customers	48	Customer attitudes towards personally addressed mail	64
Demographics	48	Consumer attitudes to mail they receive	64
Non-customers	49		
Demographics	49		
Automotive manufacturers and dealers			
Customers	50		
Demographics	50		
Non-customers	51		
Demographics	51		
Hardware stores			
Customers	52		
Demographics	52		
Non-customers	53		
Demographics	53		



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The findings

Preferred media for receiving business communications – customers

Marketing and Promotions

To remain top of mind, organisations and businesses need to provide their customers with different types of marketing and promotional information on an ongoing basis.

These kinds of communications are crucial in enabling organisations to develop lasting customer relationships and secure lifetime value.

Even so, in the information age, most organisations are mindful of not inundating customers with marketing-related material.

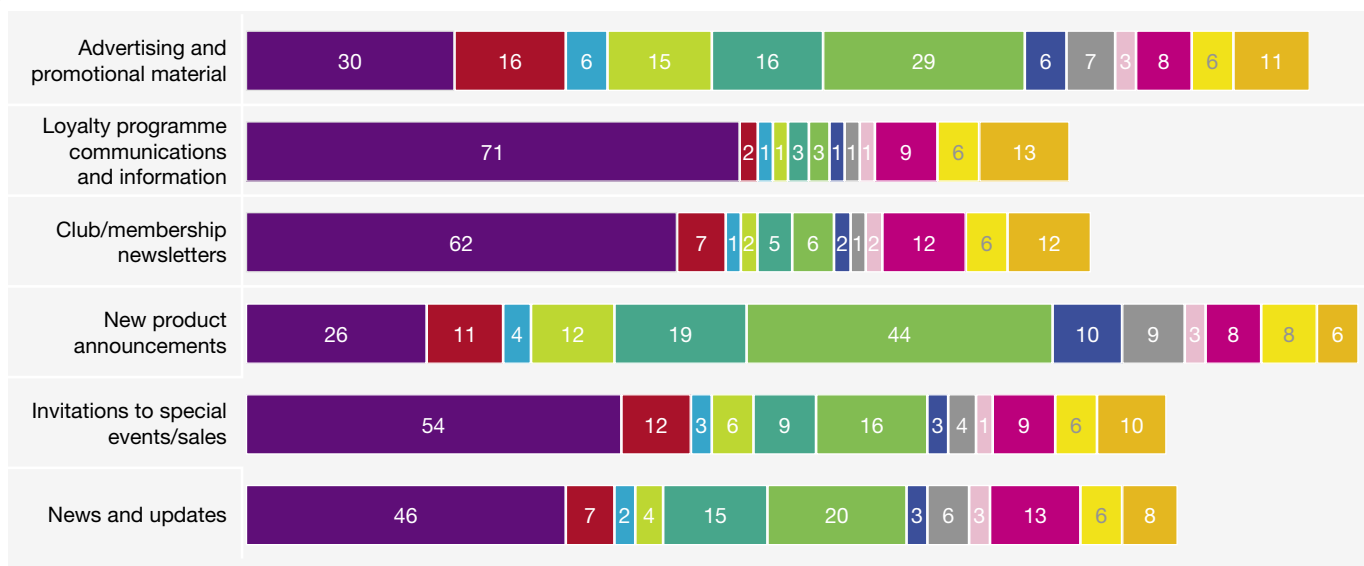
To assist marketers, this section lists the preferred media nominated by the surveyed customers for receiving the following types of marketing and promotional information:

- General advertising and promotion
- Loyalty programme
- Club/membership
- New product announcements
- Invitations to special events
- News/updates about an organisation

Furthermore, the research findings also address how frequently the customers surveyed prefer to receive these types of communications.

Preferred media for receiving marketing and promotional communications – customers

Summary



Base: Sample = 1,001

Fig 1: Summary of Fig 2 to Fig 7 illustrating how customers/members prefer to receive general, often unrequested, information

Analysis:

Where the organisation has a relationship with a consumer, the appeal of the post is widespread with the majority of those surveyed nominating personally addressed mail as the preferred medium. Even though respondents had a choice of eight media, personally addressed mail is nominated by nearly half the respondents for most of the communications listed. The preference for receiving personalised communications in the post is even greater when personalised catalogues are taken into account. Almost three-quarters of those surveyed prefer personalised mail for loyalty material. More than six out of ten favour personalised mail for club membership communications and newsletters, as well as invitations to special events and sales, and nearly half want news and updates delivered by personalised mail. Even with new product announcements that have been traditionally delivered via mass media, personalised mail and personalised catalogues are favoured by over a quarter of respondents.



NB: Where percentages do not total 100%, some respondents provided multiple answers

* Indicates the result was less than 1%

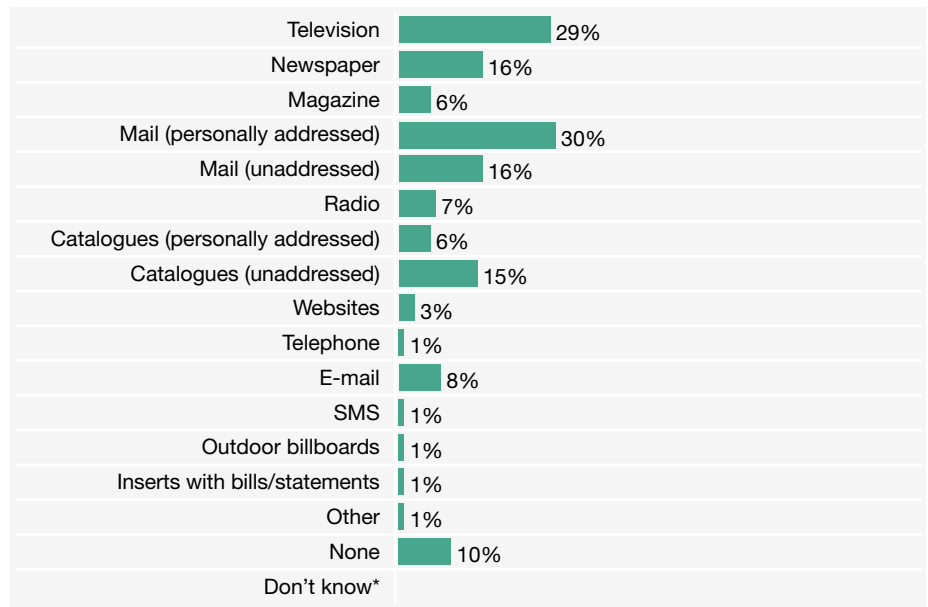


Advertising and promotional material

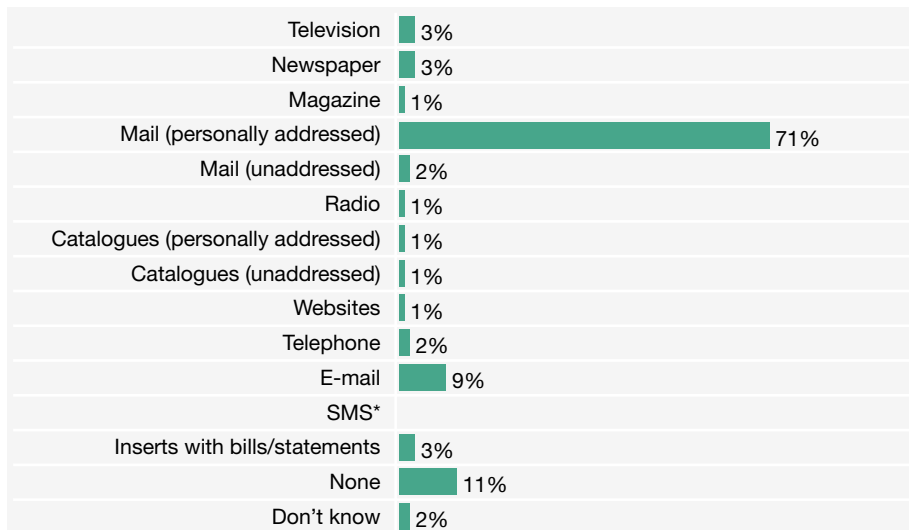
Analysis:

Personally addressed mail is the preferred medium for receiving material of an advertising or promotional nature, ahead of broadcast, print, electronic and outdoor media. When you combine personalised mail with addressed catalogues, the preference for addressed mail is even more significant with 36% of respondents selecting it as their favoured medium for material of this nature.

Base: Sample = 1,001
Fig 2: How customers/members prefer to receive advertising material



Loyalty programme communications



Base: Sample = 1,001
Fig 3: How customers/members prefer to receive loyalty statements and information

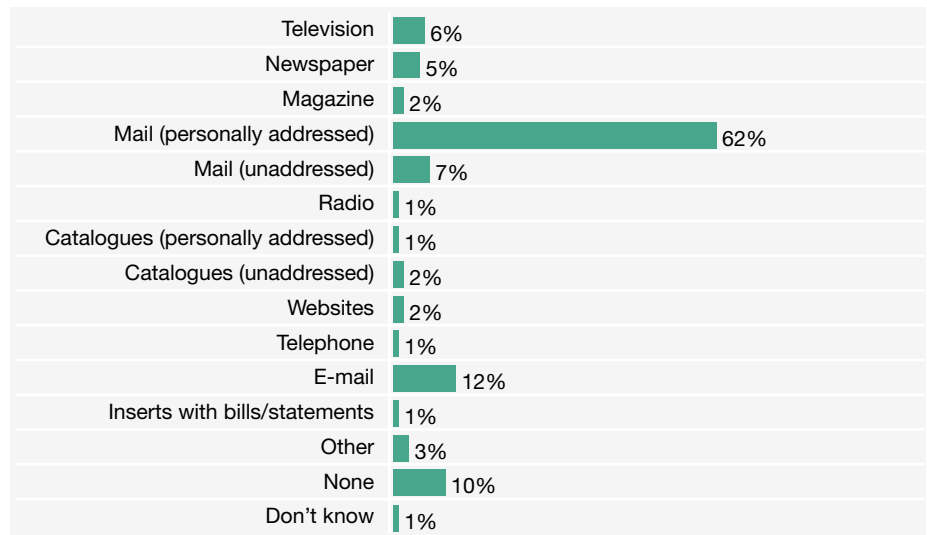
Analysis:

Where customers are members of loyalty schemes, personally addressed mail is clearly the preferred means of communication with almost three-quarters, 71%, of those surveyed.

Club or membership newsletters

Analysis:

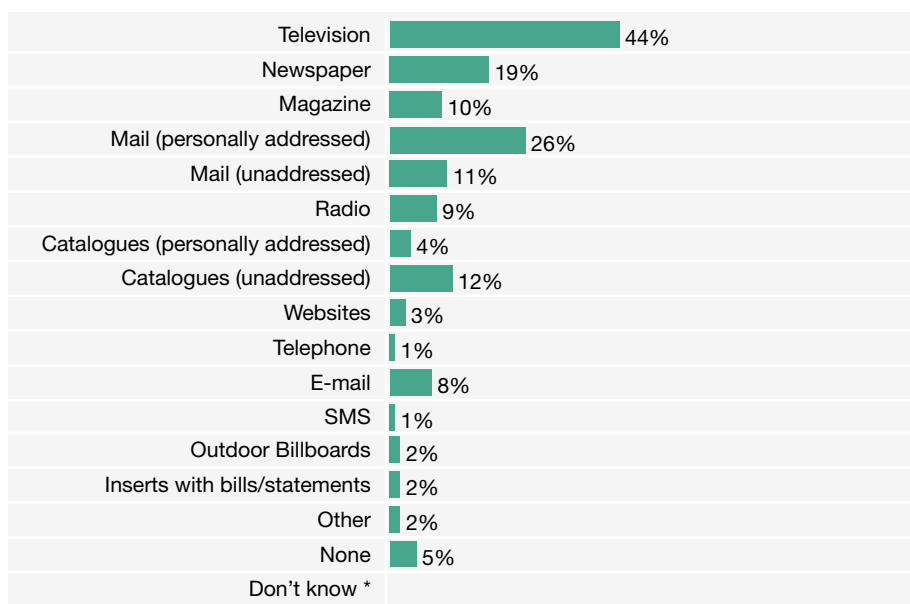
As would be expected, personally addressed mail is also the favoured medium for receiving club or membership newsletters with 62% of those surveyed. While some organisations may be tempted to send these types of communications electronically, the research findings suggest that paper-based issues mailed in the post are best. In fact, the preference for personally addressed mail versus e-mail is 5:1 according to the respondents surveyed.



Base: Sample = 1,001

Fig 4: How customers/members prefer to receive club or membership newsletters

New product announcements



Base: Sample = 1,001

Fig 5: How customers/members prefer to receive new product announcements

Analysis:

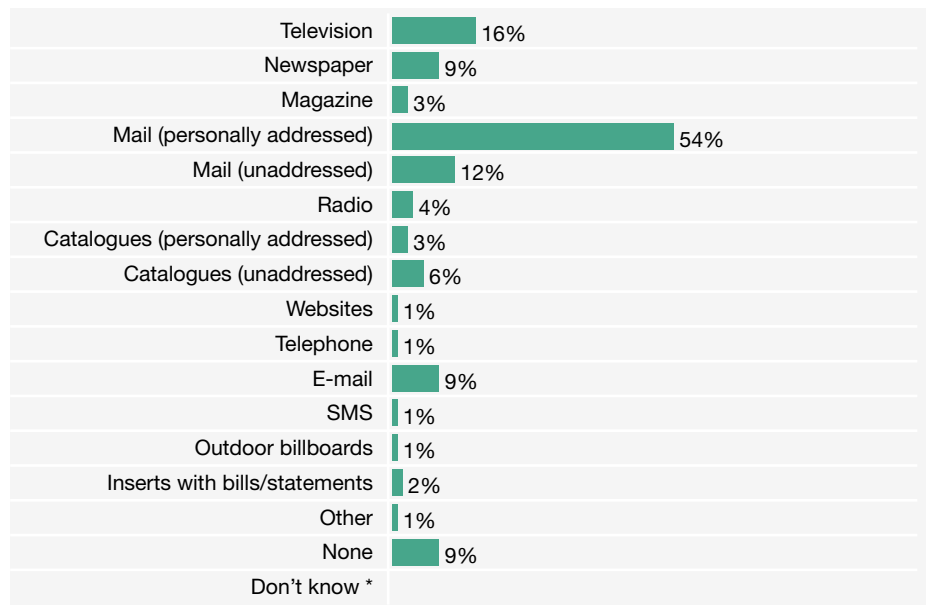
While television is nominated by 44% of customers for hearing about new products and services, the preference for personalised mail cannot be overlooked. In fact, personally addressed mail is the second-most preferred medium. When you combine personalised mail with addressed catalogues, addressed mail is favoured by almost a third of respondents (30%). This challenges any perceptions in the marketplace that direct mail is not conducive to raising awareness.



Invitations to special events or sales

Analysis:

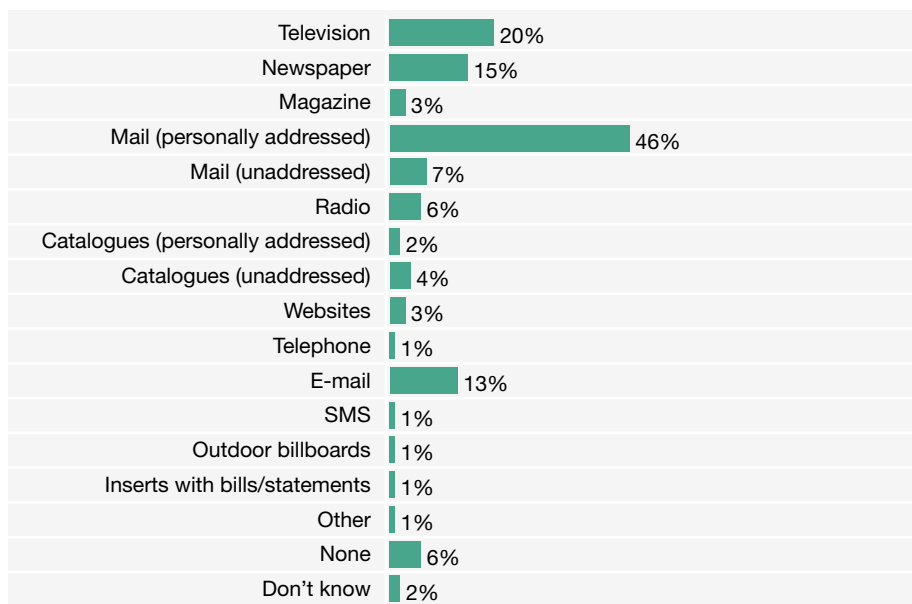
It stands to reason that personally addressed mail is the ideal medium for invitations and the research supports this. Over half the respondents surveyed (57%) nominated the post (personalised mail or addressed catalogues) as their preferred medium for these types of communications, well ahead of broadcast, press and electronic media.



Base: Sample = 1,001

Fig 6: How customers/members prefer to receive invitations to sales and special events

News/updates about an organisation



Base: Sample = 1,001

Fig 7: How customers/members prefer to receive news/updates about an organisation

Analysis:

Personally addressed mail is the customers' preferred choice for receiving news and updates about an organisation, reflecting once again mail's ability to convey large amounts of information in a convenient format. In fact, personally addressed mail is more than twice as popular as television and three times as popular as newspaper.

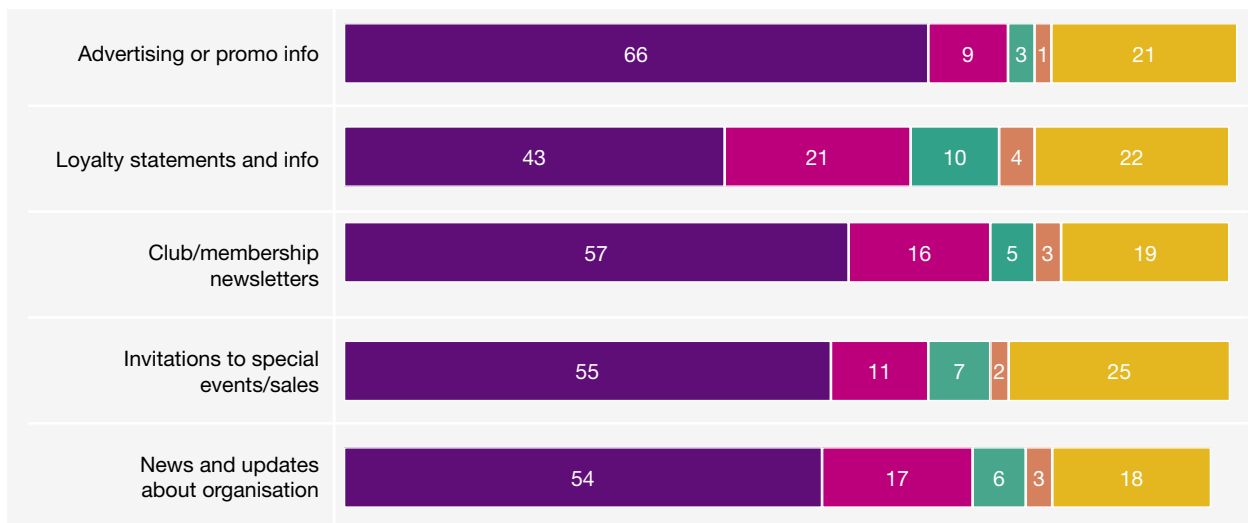
Preferred frequency for receiving marketing and promotional communications – customers

The advent of new technology, fragmented media, the emergence of more niche markets and consumer-centricity all go to make the information age a challenging time for marketers.

This research has already addressed reach in a consumer-centric environment by asking respondents to nominate their preferred media. But there is still the question of how frequently consumers prefer to be contacted.

To provide the most comprehensive analysis possible, the respondents who identified their preferred media were also asked to nominate their preferred frequency for receiving a range of marketing and promotional communications. The findings follow.

Frequency for receiving marketing and promotional communication

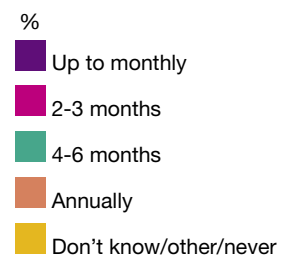


Base: Sample = 1,001

Fig 8: How frequently customers/members prefer to receive invitations, news, advertising or promotions

Analysis:

More than half the respondents surveyed are open to frequently receiving communications of a marketing and promotional nature with up to monthly (including weekly and fortnightly) being the most popular time span. Up to monthly is also favoured by recipients of loyalty statements and information with four out of ten respondents nominating this frequency, followed by two out of ten preferring bi-monthly/quarterly communications. Interestingly, respondents indicated that more frequently was preferred to less frequently with annual communications favoured least of all.



The findings

Preferred media for receiving business communications – customers

Essential Communications

Organisations and businesses need to provide their customers with information that is fundamental to administering, managing and reporting on their core activities and services.

In this section, the customers surveyed have been asked how they want to receive the following communications:

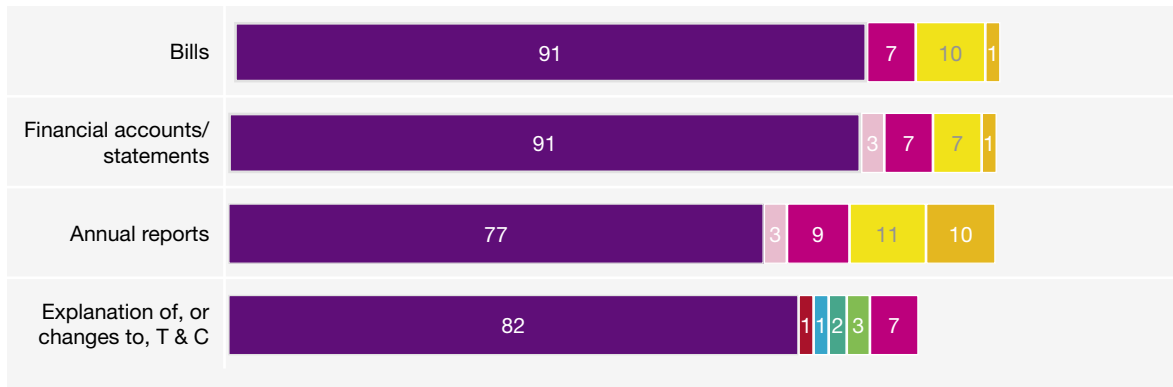
- Bills
- Financial accounts
- Annual reports
- Changes to terms and conditions

As part of the research analysis, respondents have also indicated their preferred frequency for receiving this information.

Given the importance of these communications with regard to cash flow and maintaining good customer/stakeholder relations, this section is essential reading for businesses, big and small.

Preferred media for receiving essential communications – customers

Summary



Base: Sample = 1,001

Fig 9: Summary of Fig 10 to Fig 13 illustrating how customers prefer to receive information from organisations

Analysis:

Personalised mail is by far the preferred way for customers to receive essential communications. The majority of those surveyed, nine out of ten, want bills and statements sent to them via personalised mail. For changes to terms and conditions, more than eight out of ten prefer personalised mail. While annual reports mailed in the post are favoured by more than seven out of every ten surveyed. The findings clearly show that the advent of electronic media has not impacted the appeal of the post. In fact, e-mail is preferred by fewer than one in ten.



NB: Where percentages do not total 100%, some respondents provided multiple answers

* Indicates the result was less than 1%

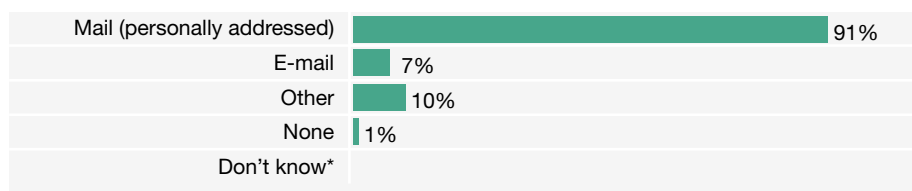


Bills

Analysis:

The overwhelming preference to receive bills by personally addressed mail cannot be denied. That's a ratio of 13:1 for mail versus e-mail.

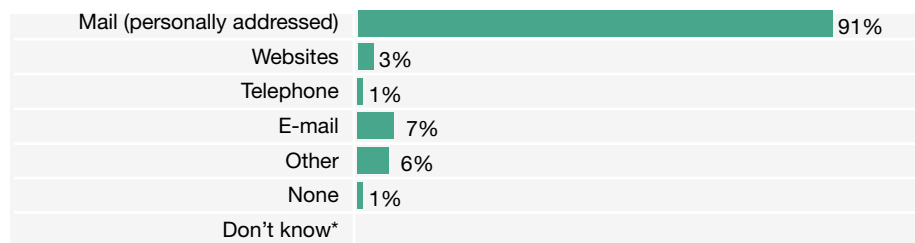
Despite the fact that many organisations offer customers the choice of receiving bills via e-mail, only a small percentage of consumers have a preference for this channel. This reflects the fact that mail provides a permanent record in a convenient format.



Base: Sample = 1,001

Fig 10: How customers/members prefer to receive bills

Financial accounts or statements



Base: Sample = 1,001

Fig 11: How customers/members prefer to receive financial accounts or statements

Analysis:

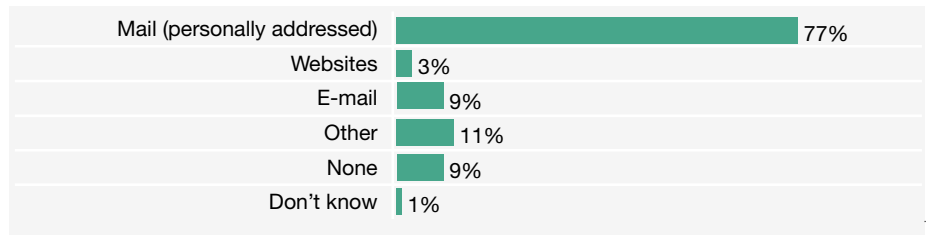
Without a doubt, the majority of respondents prefer personally addressed mail for receiving financial accounts or statements. In fact, the ratio is 13:1 for mail versus e-mail. Because of the secure and private nature of the mail medium, this is perhaps unsurprising. Despite improvements in e-mail security over the last few years, once again, only a small percentage of customers of organisations prefer to receive this kind of information via e-mail.

Annual reports

Analysis:

Personally addressed mail is also preferred to e-mail for receiving annual reports with the ratio being 8:1. This possibly reflects the fact that such documents often contain large amounts of detailed information that is best conveyed through a paper-based format.

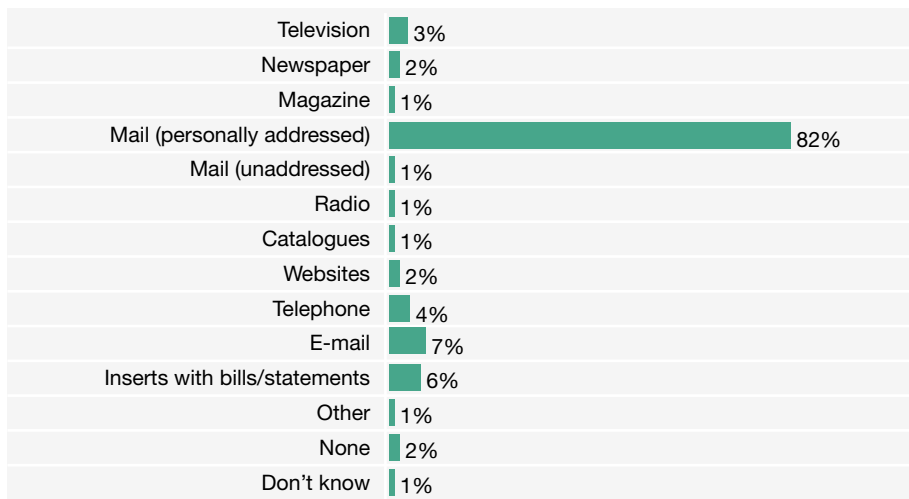
Although many companies do provide an e-mail option to receive this kind of information, it is not a channel preferred by consumers.



Base: Sample = 1,001

Fig 12: How customers/members prefer to receive annual reports

Explanations of, or changes to, terms and conditions



Base: Sample = 1,001

Fig 13: How customers/members prefer to receive explanations of, or changes to, terms and conditions

Analysis:

For more than eight out of ten respondents, personalised mail is the preferred medium for explanations and/or changes to terms and conditions. While mass media can be used for these kinds of communications, the findings suggest that it is not advisable. In fact television, radio, newspaper and magazine combined accounted for less than one in ten responses. E-mail also rates low with just 7% preferring this medium.



Preferred frequency for receiving essential communications

It stands to reason that communications that have a direct bearing on a customer's finances or budgeting are probably preferred frequently. However, the research went one further by

analysing if preferred frequency varied from account statement to bill, or depending on the types of services being invoiced. The findings follow.

Frequency for receiving essential communications



Base: Sample varies by bill/statement n=686 n=972

Fig 14: How frequently customers/members prefer to receive bills and statements

NB: Some percentages do not total 100% due to rounding

Analysis:

Monthly is the preferred frequency for most essential communications. For financial/account statements, the majority of those surveyed, more than seven out of ten, favour monthly notices. The same applies to credit card and mobile phone bills with monthly payments preferred by over eight out of ten and seven out of ten respectively.

While more than half prefer utility bills bi-monthly or quarterly and car insurance annually, almost a third nominated monthly as their preferred frequency. Given the findings, it could be advantageous for businesses to offer a choice of billing frequency, including a monthly option.

%

- Up to monthly
- 2-3 months
- 4-6 months
- Annually
- Don't know/other

Service sector

Preferred media for receiving advertising and promotional information by industry – customers and non-customers

Service sector advertising and promotions – customers and non-customers

The objective of this section was to explore how media preference for receiving advertising and promotional information varies for customers and non-customers of the following industries:

- Banking and finance
- Telecommunications
- Utilities
- Real estate
- Travel
- Restaurants

For each industry, the customer/non-customer findings are supported by key demographic and socio-economic attributes of:

- Location (metro/rural)
- Age
- Income
- Education

In all, this in-depth analysis should assist businesses in the service sector in how to communicate offers to their current customer base and to potential prospects.

Here are the findings.

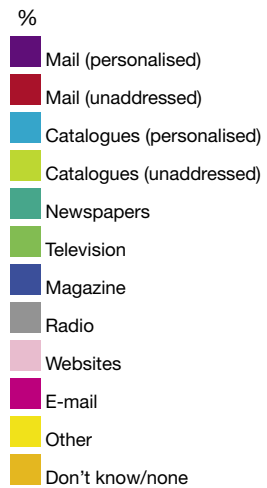
Preferred media for receiving advertising and promotional information by industry – customers and non-customers

Summary – when a customer



Base: Sample = 508

Fig 15: Summary of Fig 17, Fig 21, Fig 25, Fig 29, Fig 33 and Fig 37 illustrating the preferred media for receiving advertising and promotional information from service industries when a customer

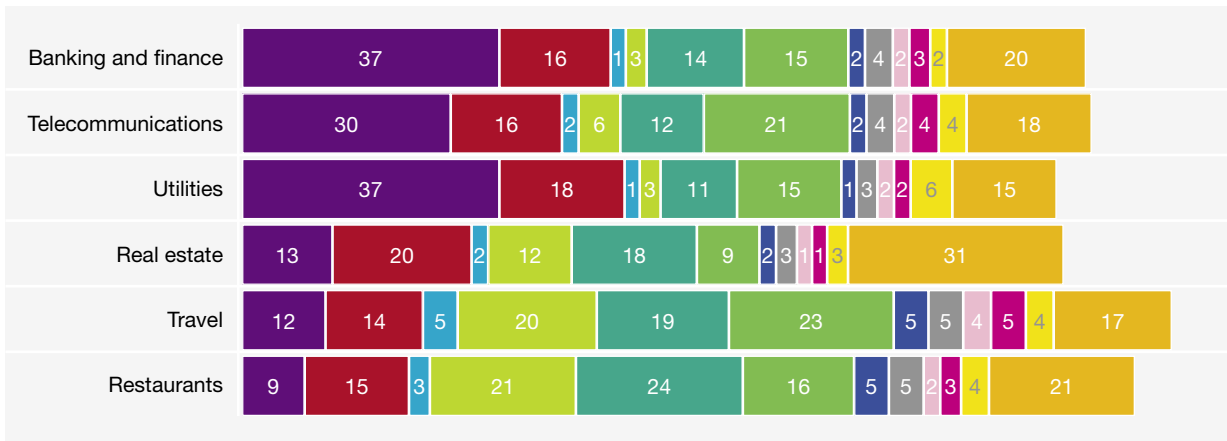


Analysis:

Mail in all forms rates highly with customers of service industries. Personalised mail is the preferred medium for well over half the customers surveyed when the service is critical to the smooth operation of one's life such as banking and finance, telecommunications and utilities. Personalised mail is also the favourite medium with customers of real estate companies, while the personally addressed or unaddressed catalogue, another form of mail, is the preferred way for customers to receive communications from travel and restaurant businesses.



Summary – when not a customer



Base: Sample = 500

Fig 16: Summary of Fig 19, Fig 23, Fig 27, Fig 31, Fig 35 and Fig 39 illustrating the preferred media for receiving advertising and promotional information from service industries when not a customer

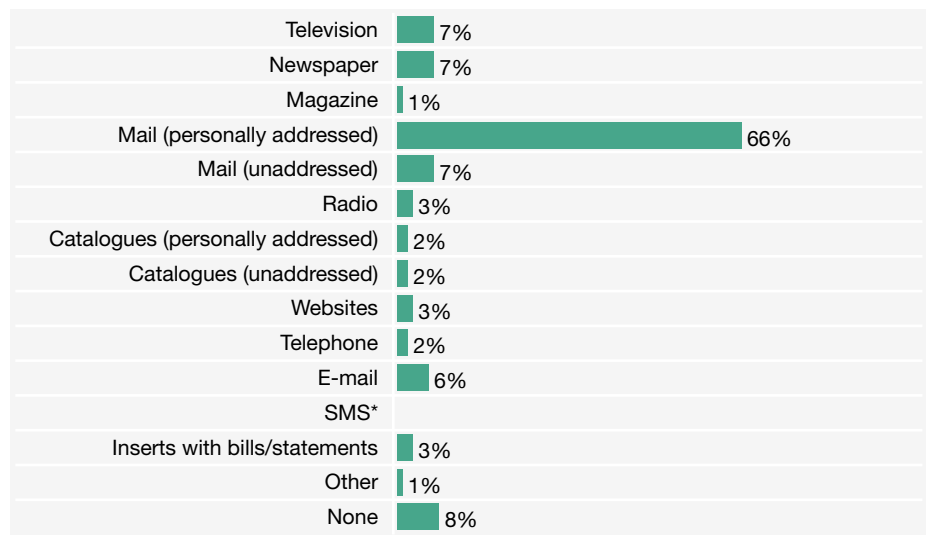
Analysis:

Mail is also the most popular medium among non-customers of service industries. For those services deemed important to everyday life, personalised mail is still the preferred medium even when the recipient is not a current customer of the company in question. Non-customers, however, prefer unaddressed mail from real estate companies, with personally addressed or unaddressed catalogues favoured from travel agents and restaurant proprietors.



Preferred media for receiving advertising and promotional information from the service sector – customers and non-customers

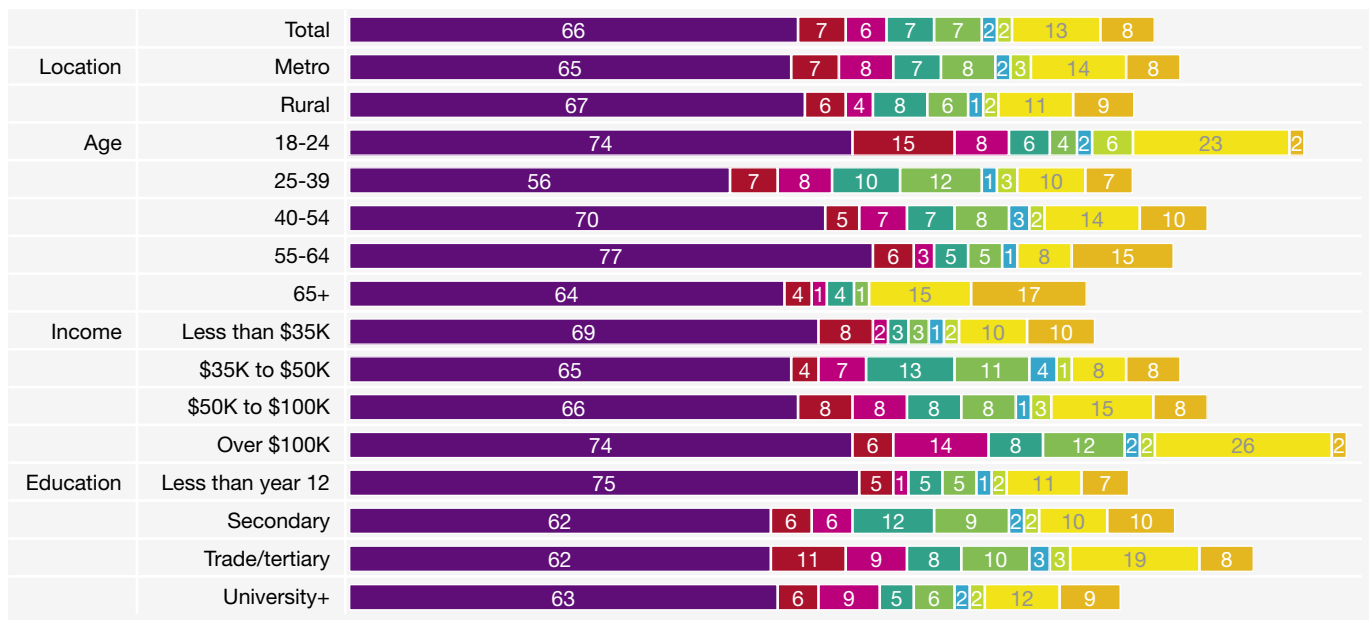
Banks and financial institutions – when a customer



Base: Sample = 508

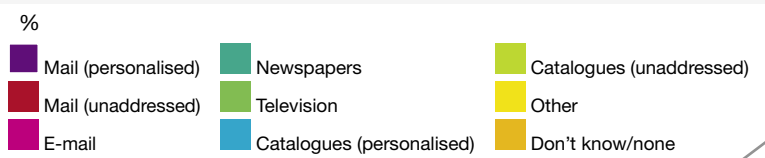
Fig 17: The preferred media for receiving advertising or promotional information from banks and financial institutions when a customer

By demographics



Base: Sample = 508

Fig 18: Demographics for the preferred media for receiving advertising or promotional information from banks and financial institutions when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers

* Indicates the result was less than 1%

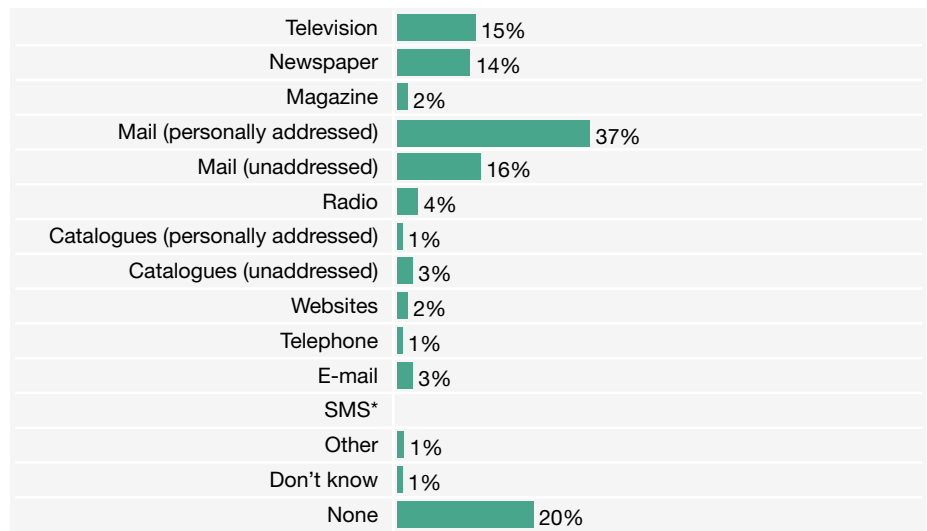


Analysis:

Personally addressed mail is the preferred medium with both customers and non-customers of banks and financial institutions. In fact, personalised mail is significantly more popular than broadcast, press or electronic media. More than six out of ten customers surveyed nominated personalised mail, compared with fewer than one in ten who favoured television, newspaper,

magazine or e-mail. For non-customers, personalised mail is preferred by over twice as many who nominated television or newspapers and is over ten times more popular than magazines or e-mail. Furthermore, the overwhelming preference for mail is consistent across the board, irrespective of demographics (location/age/income/level of education achieved).

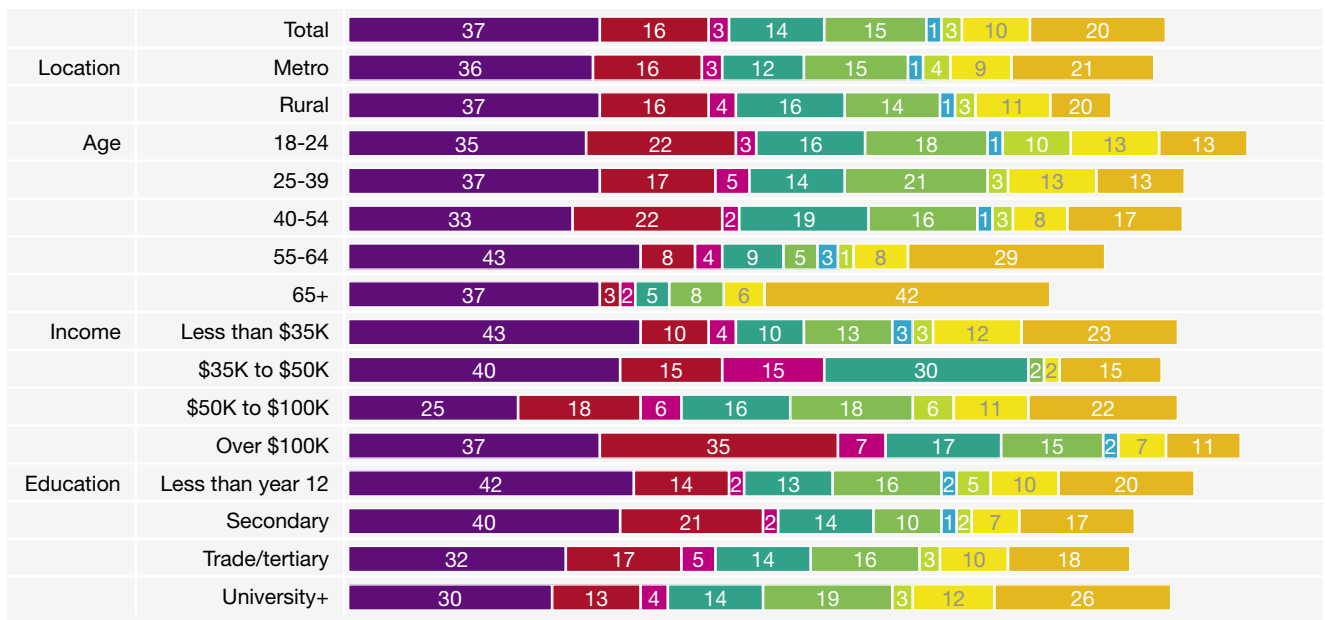
Banks and financial institutions – when not a customer



Base: Sample = 500

Fig 19: The preferred media for receiving advertising or promotional information from banks and financial institutions when a non-customer

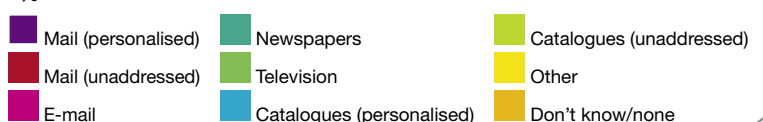
By demographics



Base: Sample = 500

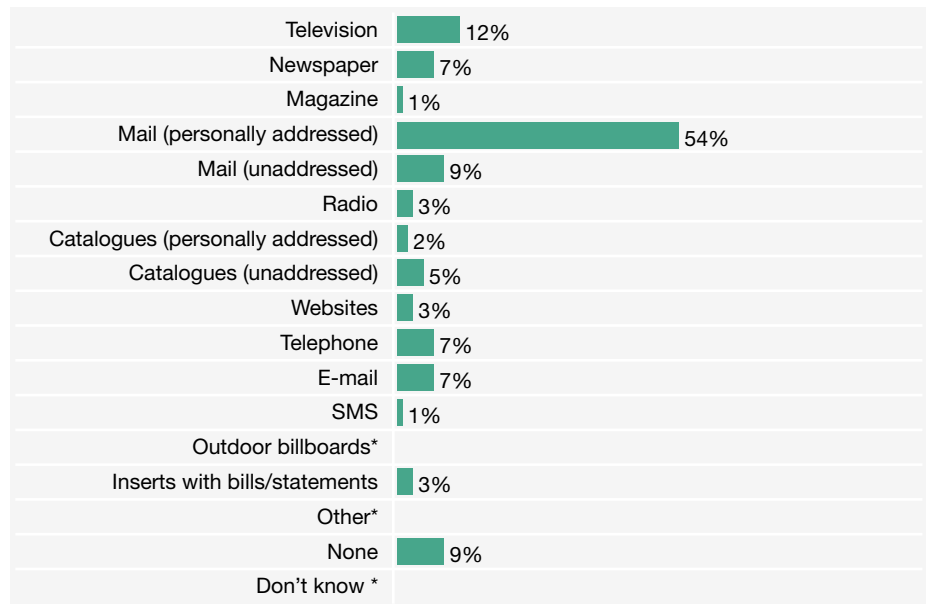
Fig 20: Demographics for the preferred media for receiving advertising or promotional information from banks and financial institutions when a non-customer

%



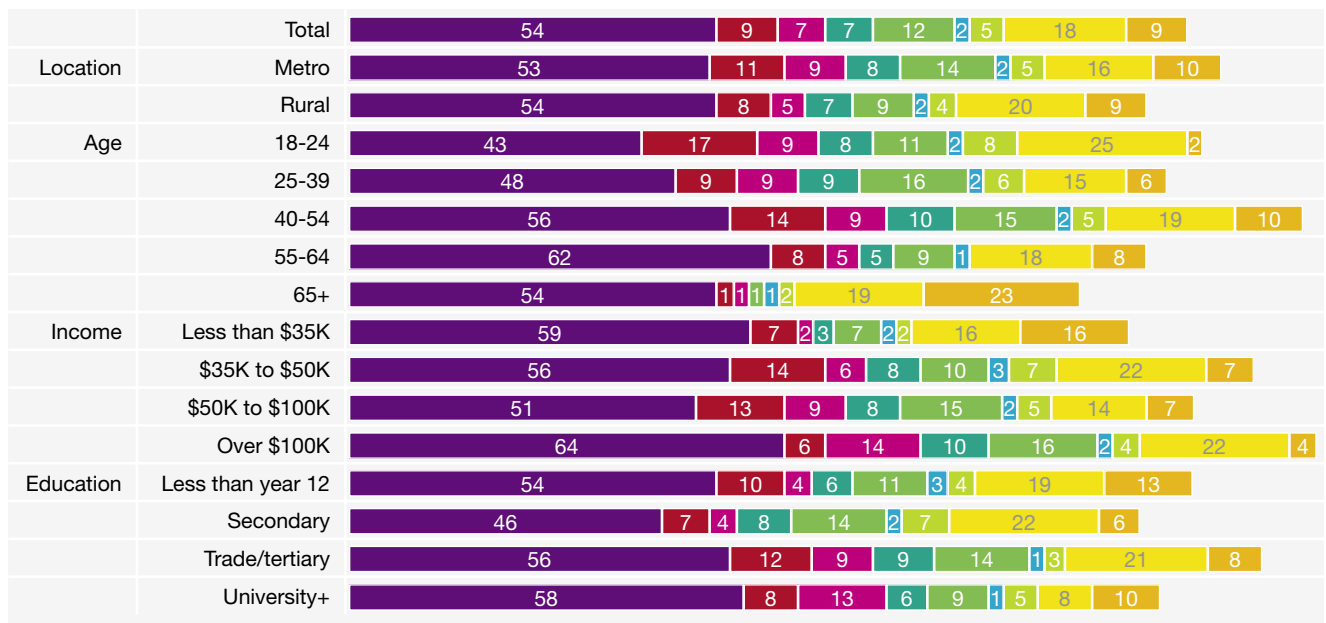
Preferred media for receiving advertising and promotional information from the service sector – customers and non-customers

Telecommunications companies – when a customer

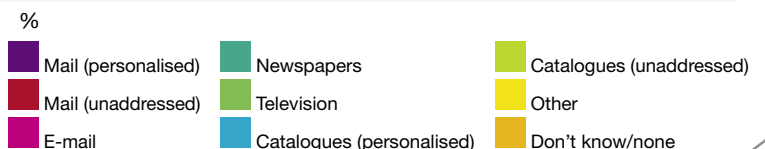


Base: Sample = 508
 Fig 21: The preferred media for receiving advertising or promotional information from telecommunications companies when a customer

By demographics



Base: Sample = 508
 Fig 22: Demographics for the preferred media for receiving advertising or promotional information from telecommunications companies when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

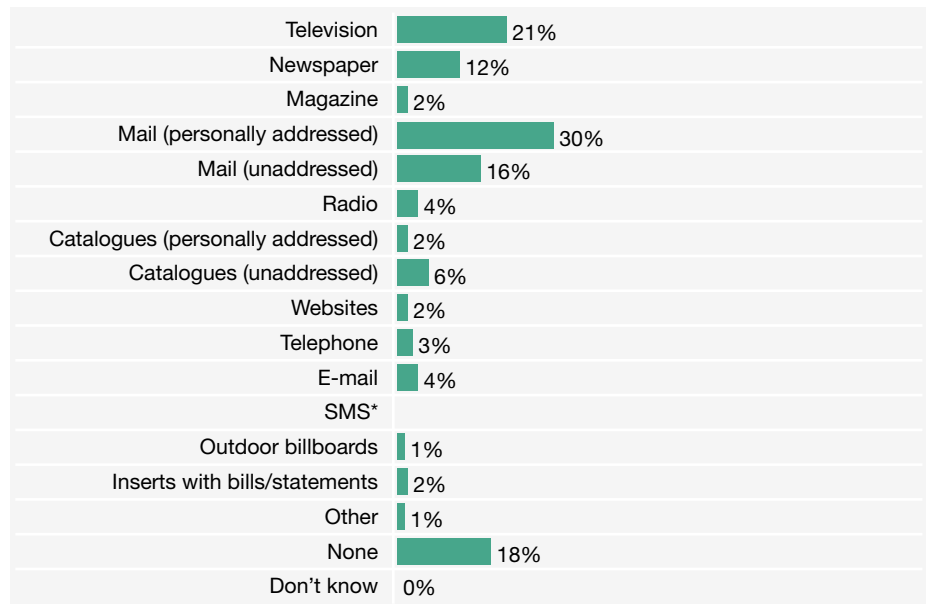


Analysis:

Personally addressed mail is preferred by over half the customers and almost a third of non-customers. Despite telecommunication companies being associated with Internet

and mobile communications, e-mail and SMS barely rate a mention with the customers and non-customers surveyed, favoured by just 8% and 4% respectively.

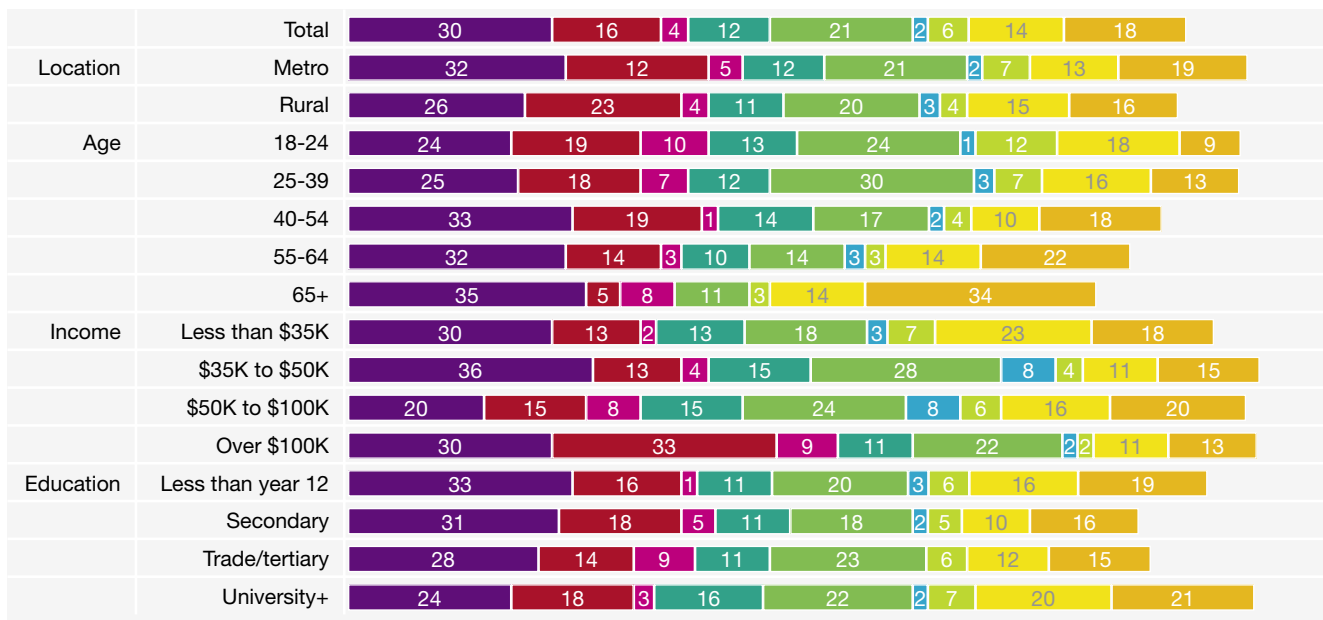
Telecommunications companies – when not a customer



Base: Sample = 500

Fig 23: The preferred media for receiving advertising or promotional information from telecommunications companies when a non-customer

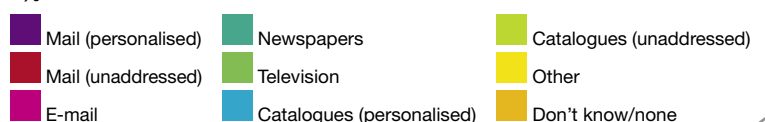
By demographics



Base: Sample = 500

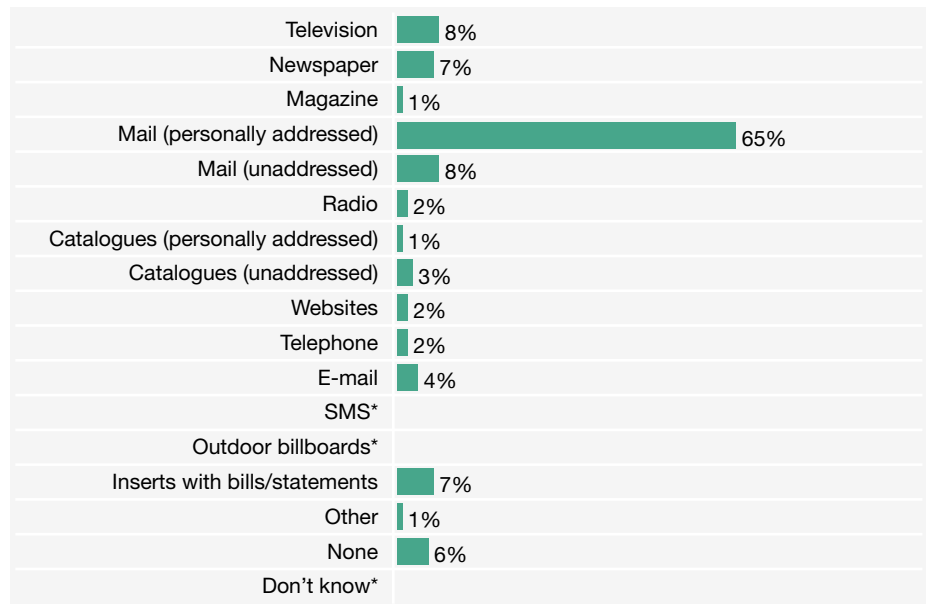
Fig 24: Demographics for the preferred media for receiving advertising or promotional information from telecommunications companies when a non-customer

%



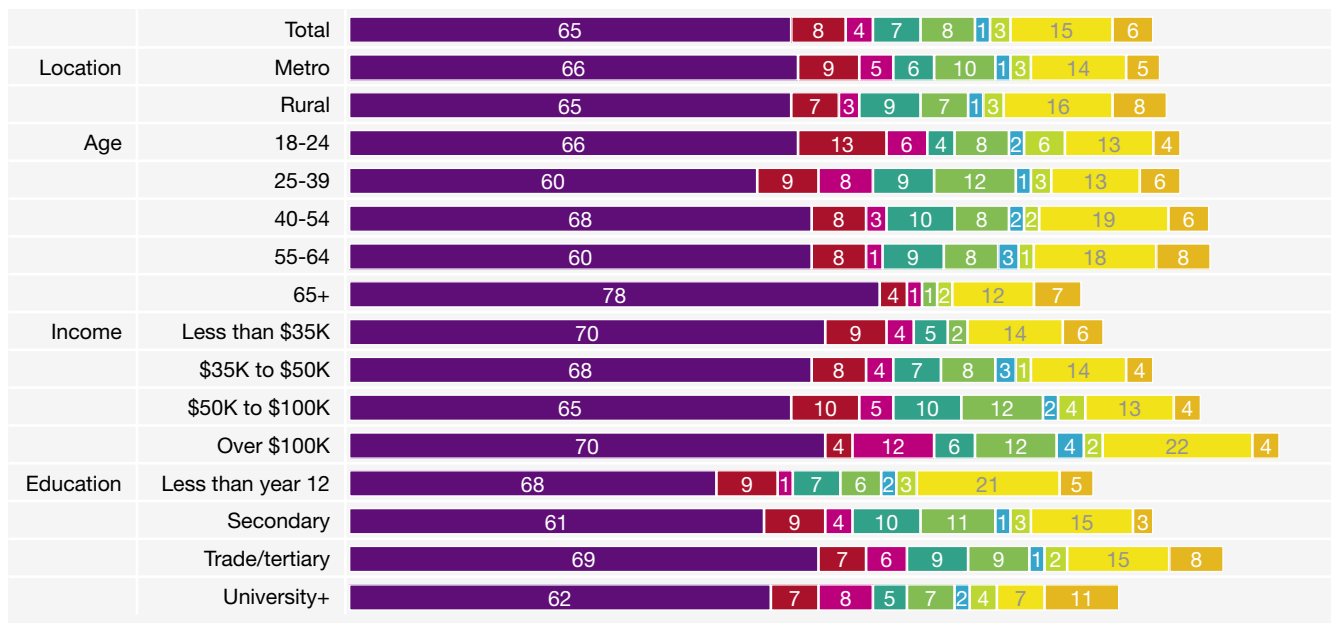
Preferred media for receiving advertising and promotional information from the service sector – customers and non-customers

Utility providers – when a customer

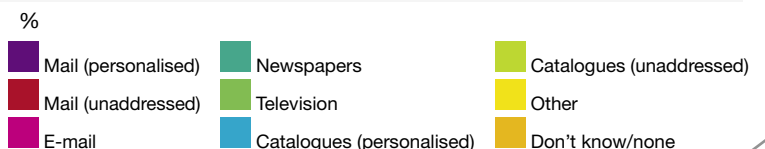


Base: Sample = 508
Fig 25: The preferred media for receiving advertising or promotional information from utility providers when a customer

By demographics



Base: Sample = 508
Fig 26: Demographics for the preferred media for receiving advertising or promotional information from utility providers when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
* Indicates the result was less than 1%

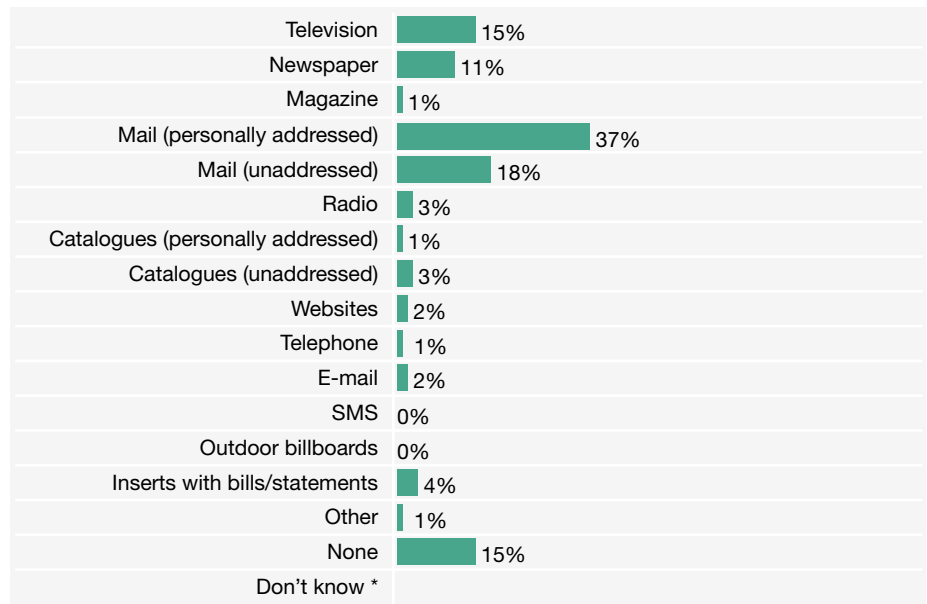


Analysis:

More than half the customers surveyed want to receive advertising and promotional material from utility providers via personalised mail. In fact, personalised mail is eight times more

popular with customers than television and newspapers. For non-customers, personalised mail is the preferred medium with over a third of respondents, followed by unaddressed mail.

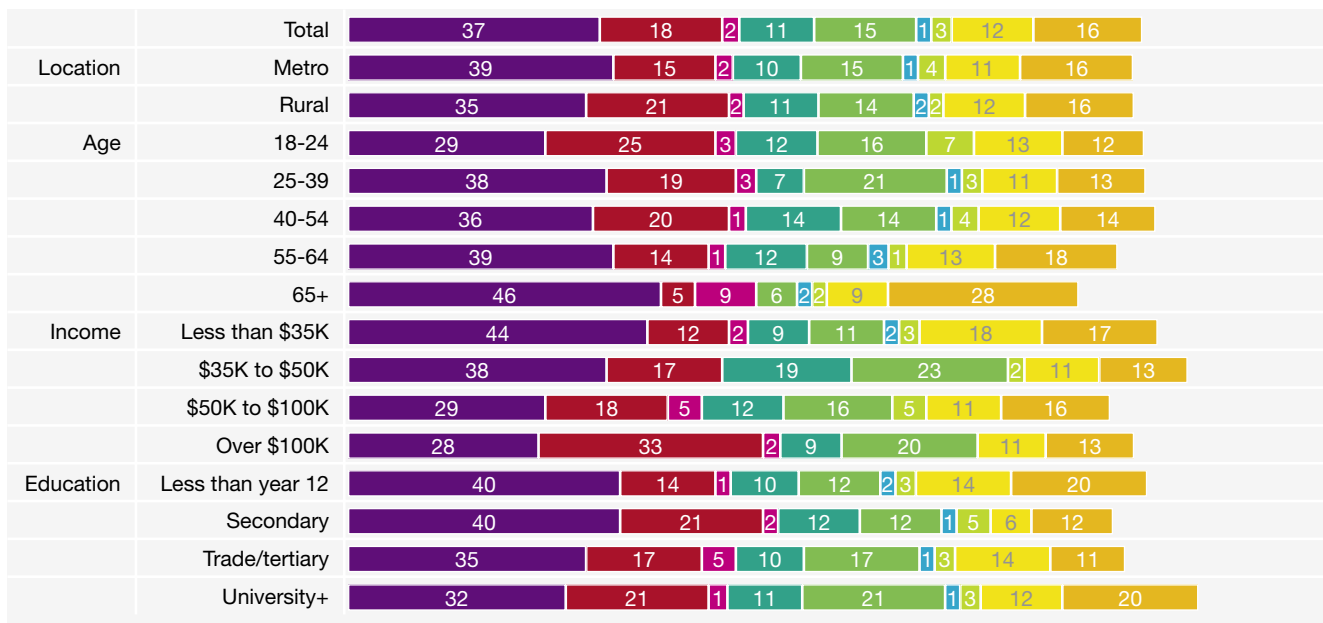
Utility providers – when not a customer



Base: Sample = 500

Fig 27: The preferred media for receiving advertising or promotional information from utility providers when a non-customer

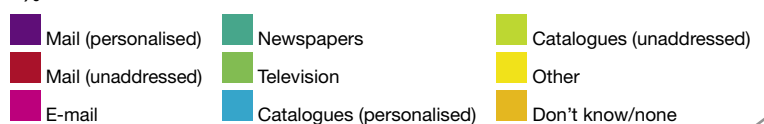
By demographics



Base: Sample = 500

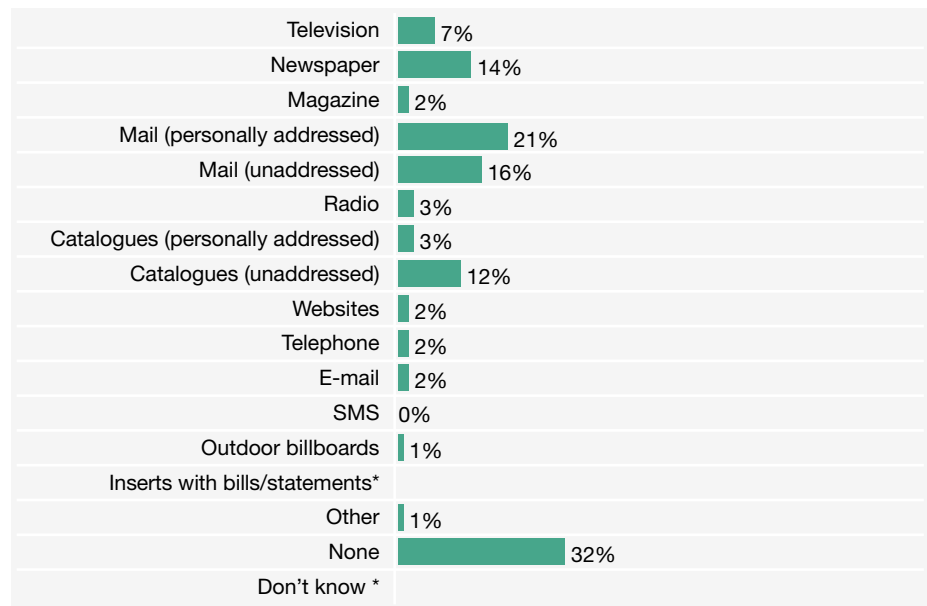
Fig 28: Demographics for the preferred media for receiving advertising or promotional information from utility providers when a non-customer

%



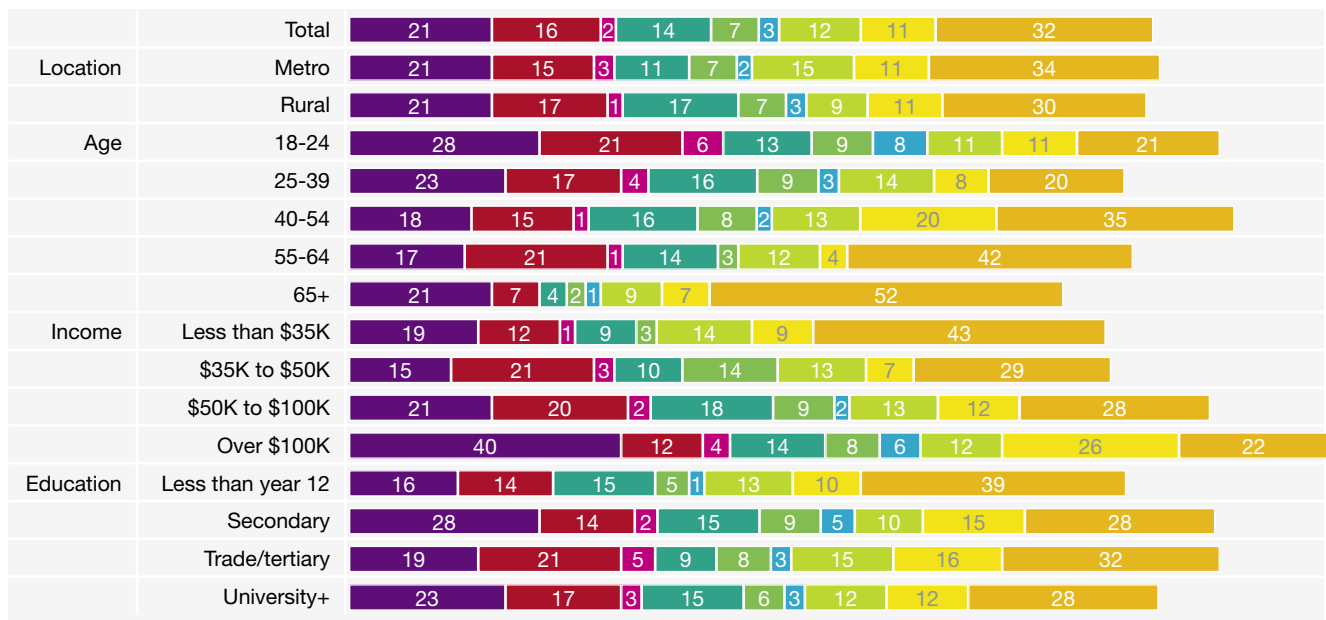
Preferred media for receiving advertising and promotional information from the service sector – customers and non-customers

Real estate firms – when a customer

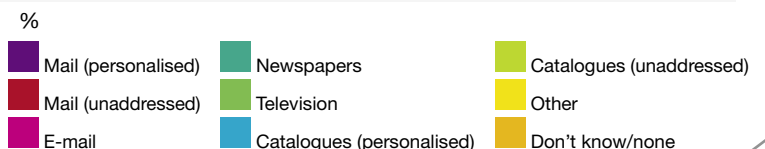


Base: Sample = 508
 Fig 29: The preferred media for receiving advertising or promotional information from real estate firms when a customer

By demographics



Base: Sample = 508
 Fig 30: Demographics for the preferred media for receiving advertising or promotional information from real estate firms when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

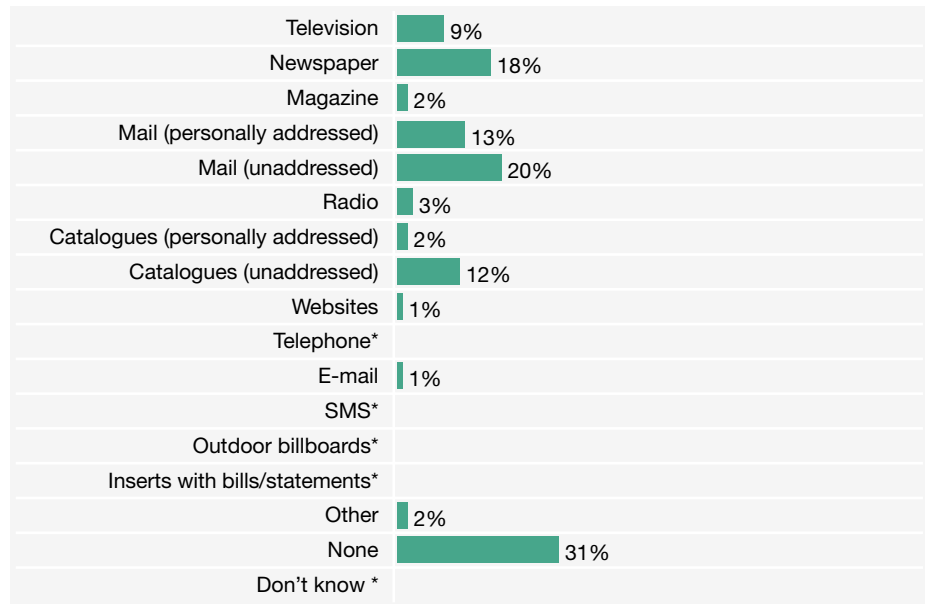


Analysis:

The majority of those surveyed prefer to receive no real estate material, which could be a reflection of the low proportion of people in the market for real estate services at any given time. Of those who are interested, the post (personalised mail and

addressed catalogue) is the most popular medium with almost a quarter of the customers surveyed, while unaddressed mail and unaddressed catalogues are favoured by almost a third of the non-customers surveyed.

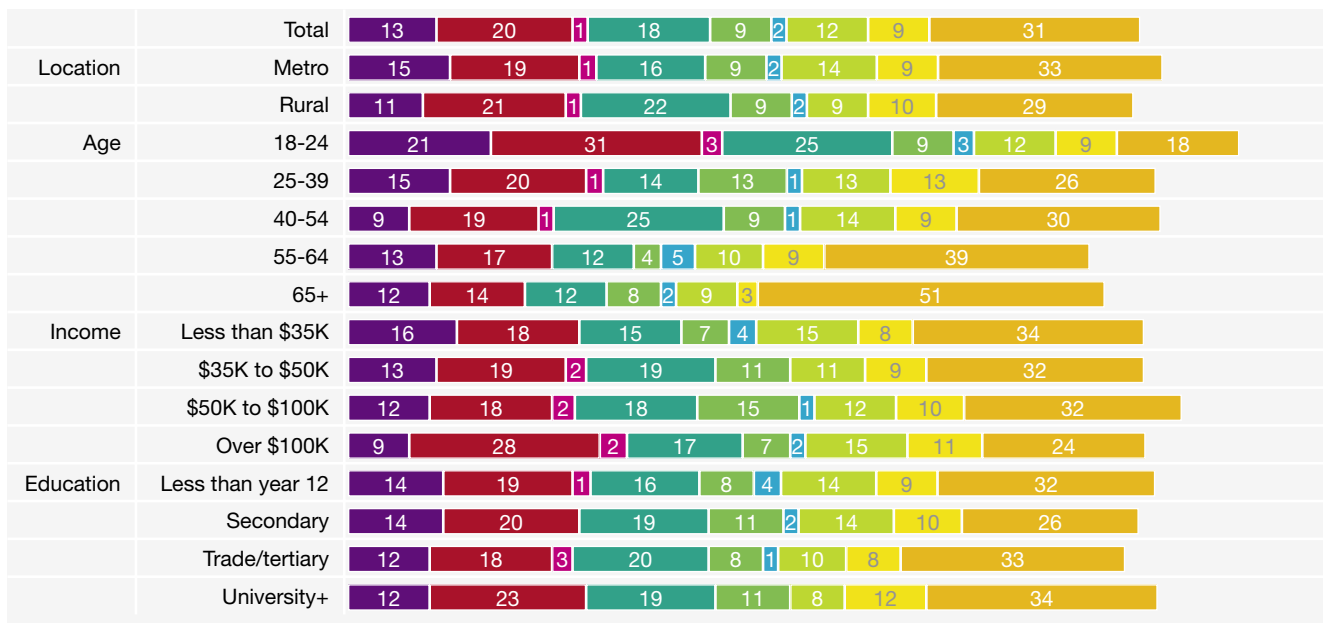
Real estate firms – when not a customer



Base: Sample = 500

Fig 31: The preferred media for receiving advertising or promotional information from real estate firms when a non-customer

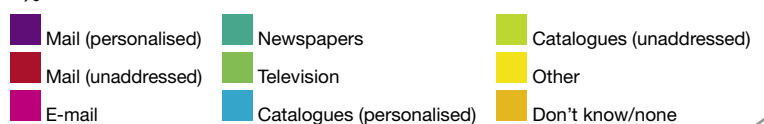
By demographics



Base: Sample = 500

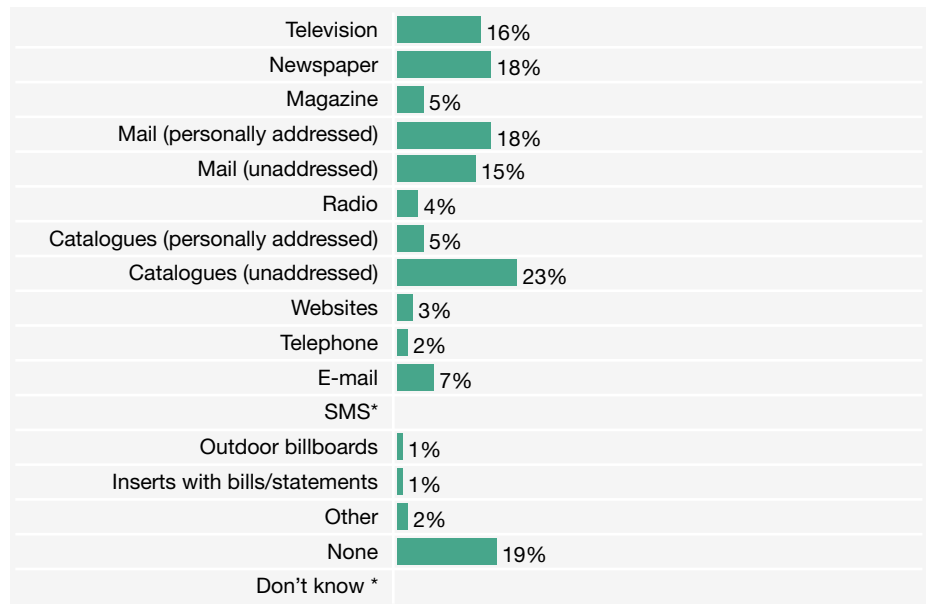
Fig 32: Demographics for the preferred media for receiving advertising or promotional information from real estate firms when a non-customer

%



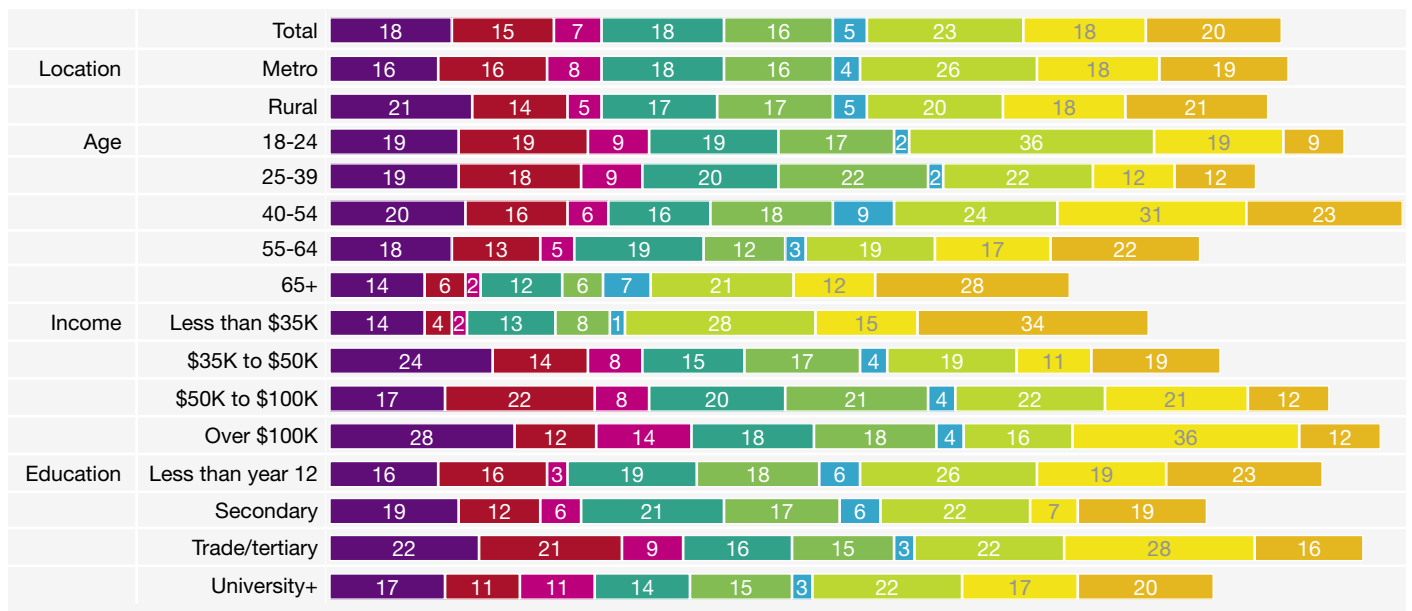
Preferred media for receiving advertising and promotional information from the service sector – customers and non-customers

Travel organisations – when a customer

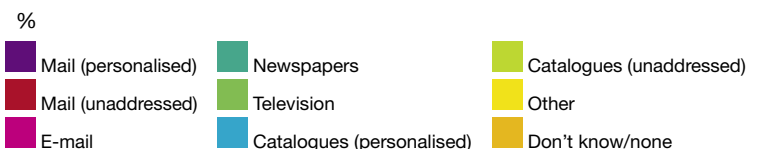


Base: Sample = 508
 Fig 33: The preferred media for receiving advertising or promotional information from travel organisations when a customer

By demographics



Base: Sample = 508
 Fig 34: Demographics for the preferred media for receiving advertising or promotional information from travel organisations when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

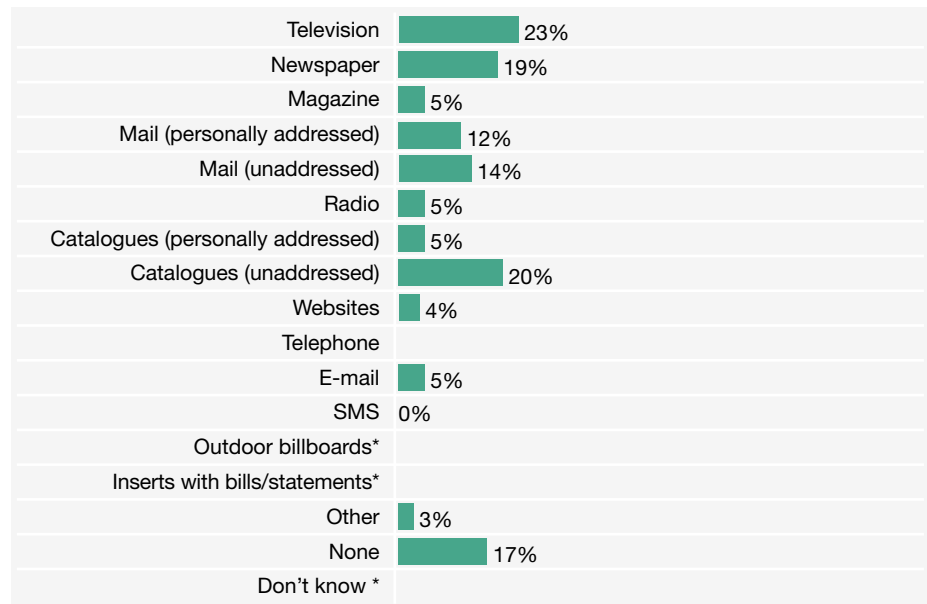


Analysis:

The unaddressed catalogue is the preferred medium with nearly a quarter of the travel company customers surveyed. When combined with unaddressed mail, it accounts for over a third of the respondents (38%). Personalised communications delivered in the mail also rate well with customers. In fact, personalised mail and addressed catalogues are favoured by 23% of the customers surveyed, compared with newspapers at 18% and television at 16%.

For non-customers, television is the preferred medium followed closely by unaddressed catalogues, at 23% and 20% respectively. However, when unaddressed catalogues are combined with unaddressed mail, non-personalised communications delivered to the letterbox are favoured by the majority (34%) of the non-customers surveyed. It is interesting to note that the vast majority of respondents prefer not to receive travel information via electronic media despite an industry drive to promote on-line acceptance.

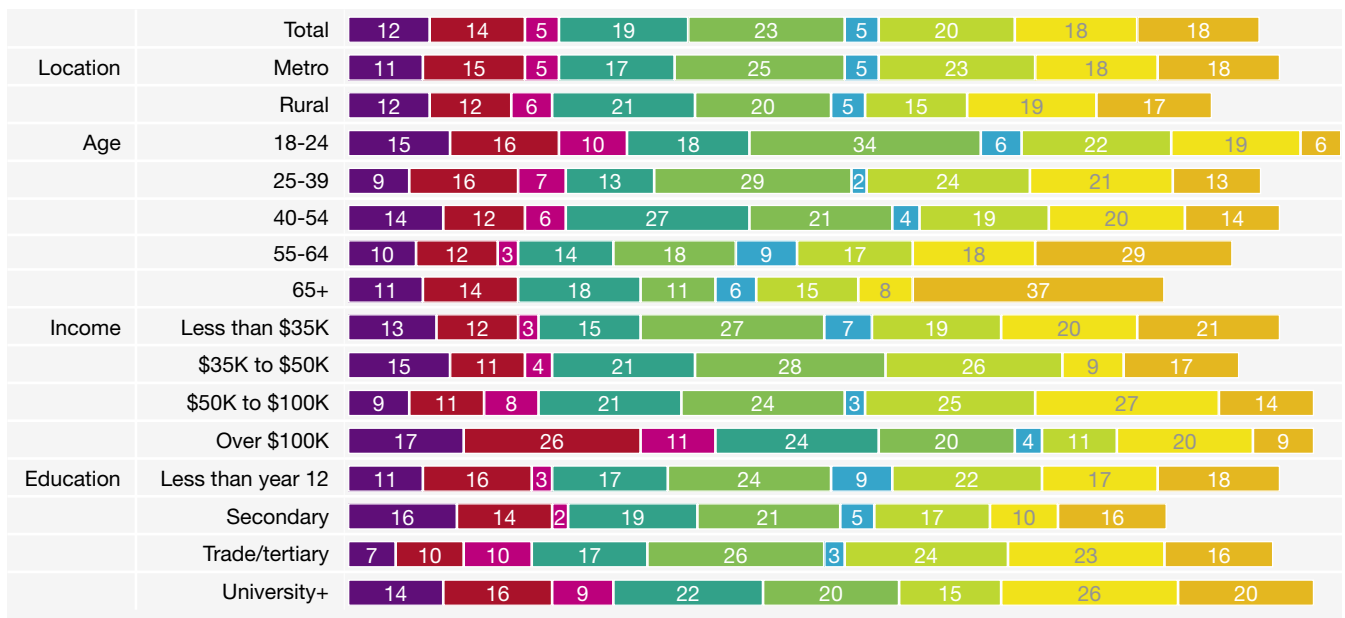
Travel organisations – when not a customer



Base: Sample = 500

Fig 35: The preferred media for receiving advertising or promotional information from travel organisations when a non-customer

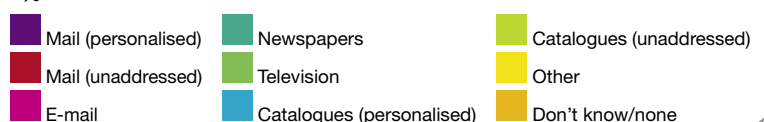
By demographics



Base: Sample = 500

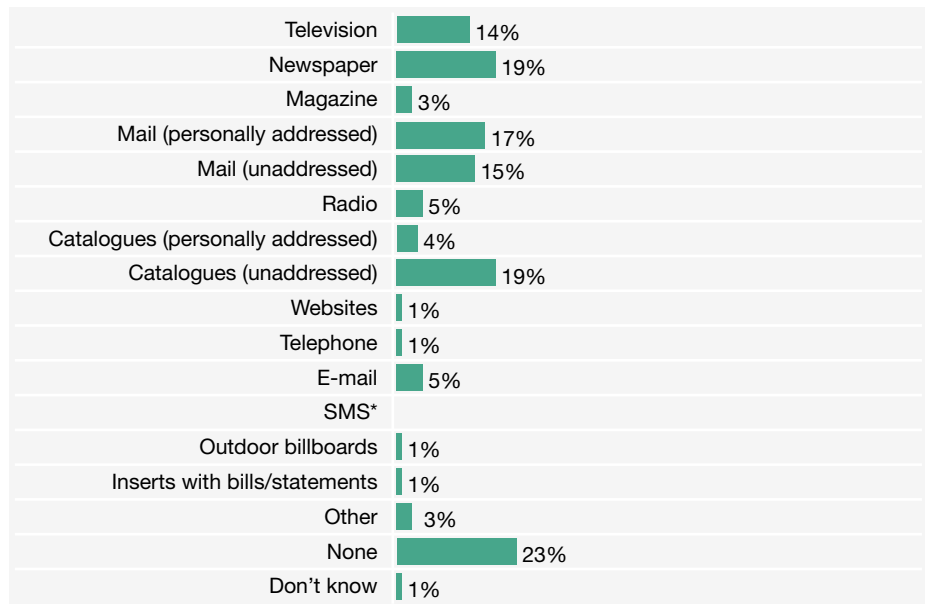
Fig 36: Demographics for the preferred media for receiving advertising or promotional information from travel organisations when a non-customer

%



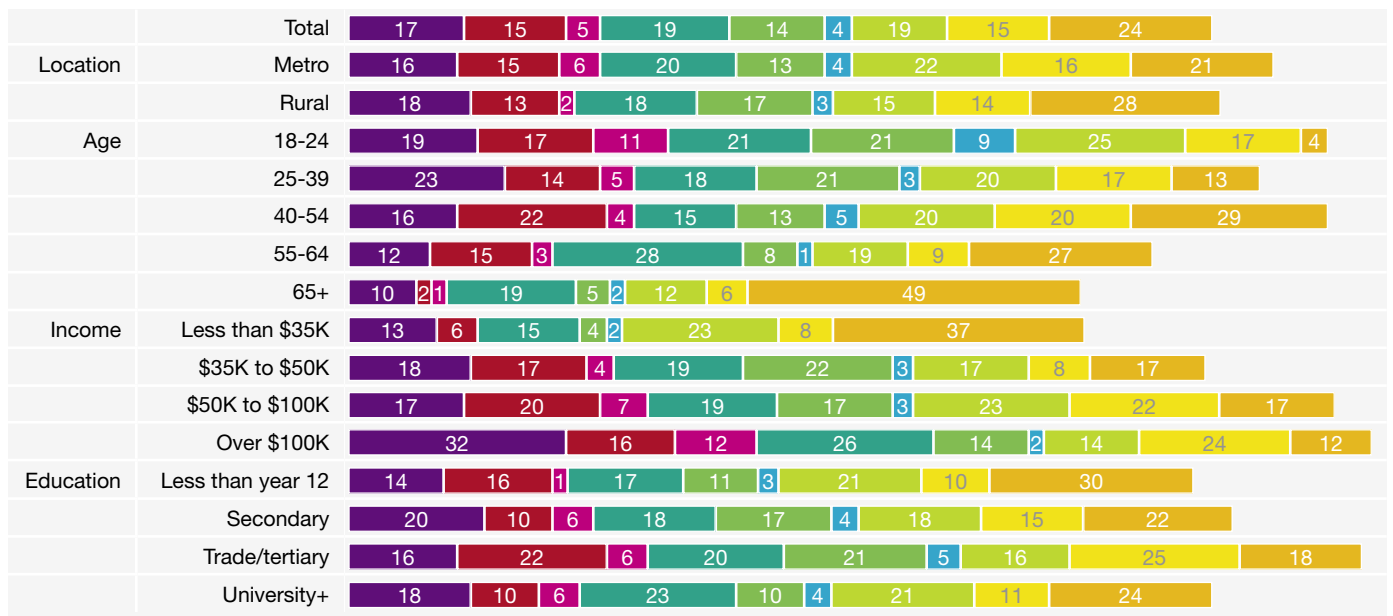
Preferred media for receiving advertising and promotional information from the service sector – customers and non-customers

Restaurants – when a customer

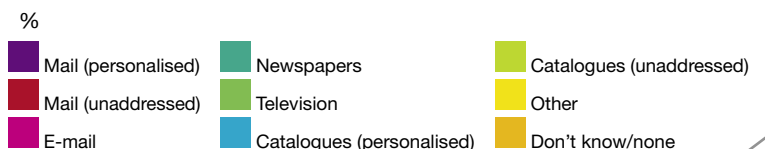


Base: Sample = 508
Fig 37: The preferred media for receiving advertising or promotional information from restaurants when a customer

By demographics



Base: Sample = 508
Fig 38: Demographics for the preferred media for receiving advertising or promotional information from restaurants when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
* Indicates the result was less than 1%

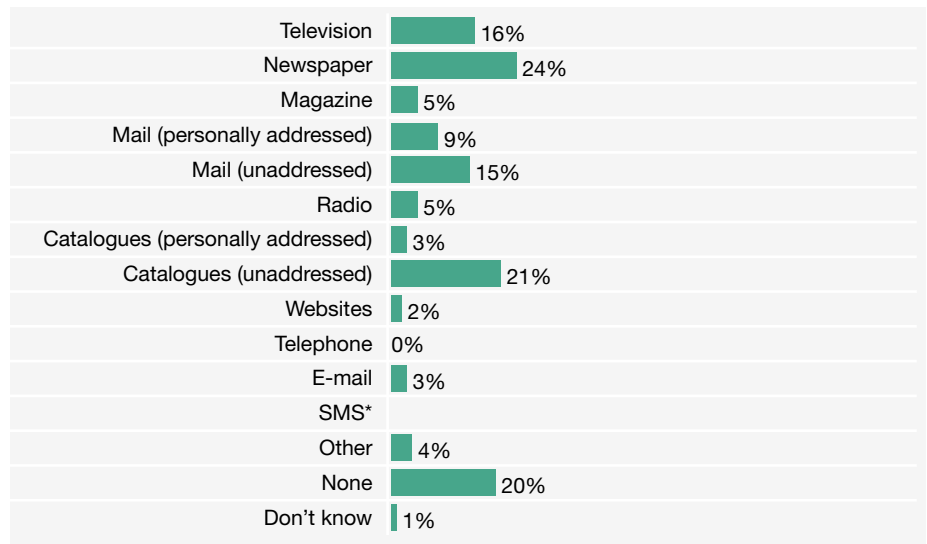


Analysis:

For restaurant customers, unaddressed catalogues and newspapers are the preferred media at 19% each. For non-customers, newspaper is the preferred medium closely followed by unaddressed catalogues, at 24% and 21% respectively. However, when you combine unaddressed catalogues with unaddressed mail, the majority of restaurant customers and non-customers, over a third, prefer to receive non-personalised

communications delivered to their letterboxes. Personally addressed mail also rates highly with customers and, when combined with addressed catalogues, accounts for 21% of the survey respondents. Almost a quarter of the customers and one-fifth of the non-customers surveyed do not want to receive any communications from restaurants.

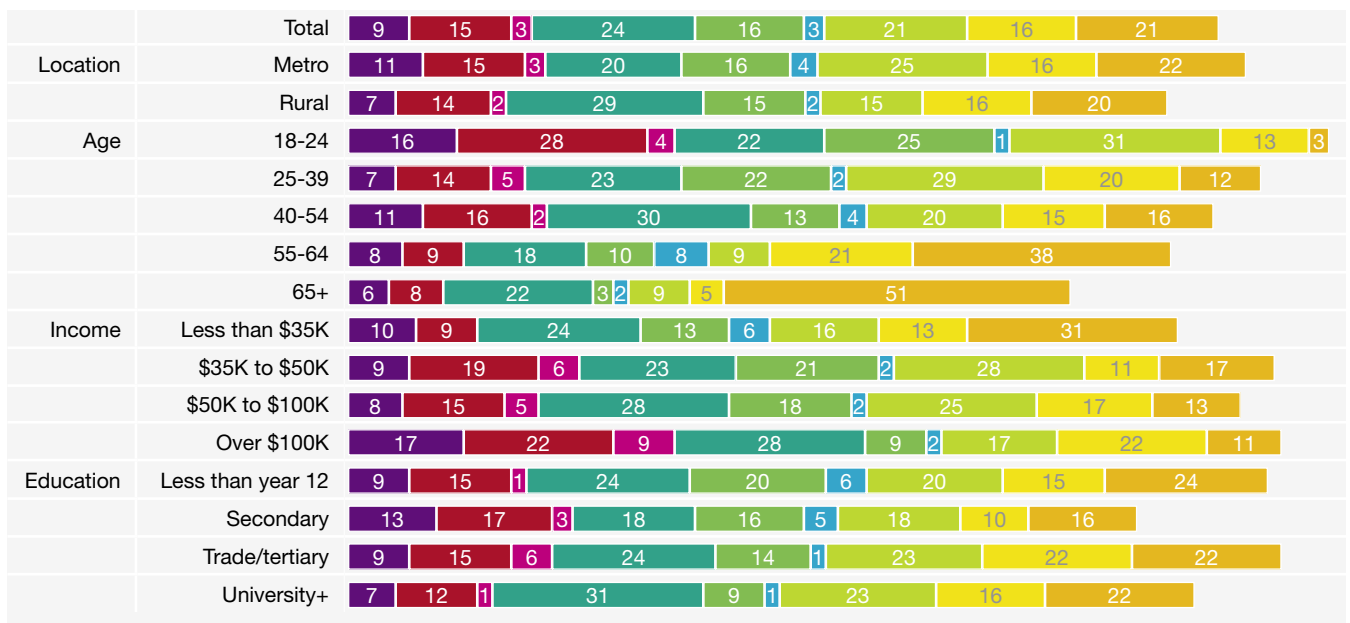
Restaurants – when not a customer



Base: Sample = 500

Fig 39: The preferred media for receiving advertising or promotional information from restaurants when a non-customer

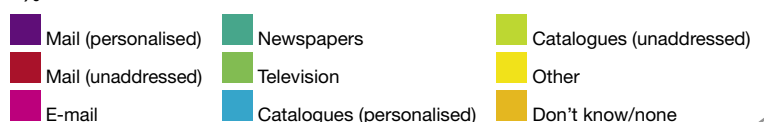
By demographics



Base: Sample = 500

Fig 40: Demographics for the preferred media for receiving advertising or promotional information from restaurants when a non-customer

%



Retail sector

Preferred media for receiving advertising and promotional information by industry – customers and non-customers

Retail sector advertising and promotions – customers and non-customers

The objective of this section was to explore how media preference for receiving advertising and promotional information varies for customers and non-customers of the following retailers:

- Retailers overall
- Supermarkets
- Department stores
- Fashion stores
- Auto manufacturers and dealers
- Hardware stores

For each retailer, the customer/non-customer findings are supported by key demographic and socio-economic attributes of:

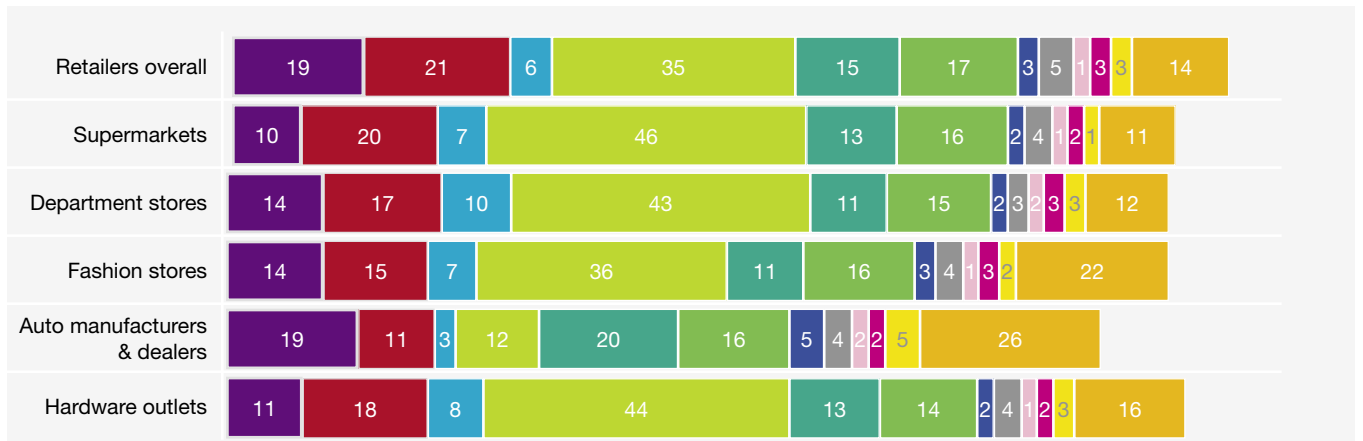
- Location (metro/rural)
- Age
- Income
- Education

In all, this in-depth analysis should assist retail businesses in how to communicate offers to their current customer base and to potential prospects.

Here are the findings.

Preferred media for receiving advertising and promotional communication by industry – customers and non-customers

Summary – when a customer



Base: Sample = 508

Fig 41: Summary of Fig 43, Fig 47, Fig 51, Fig 55, Fig 59 and Fig 63 illustrating the preferred media for receiving advertising or promotional information from retailers when a customer

Analysis:

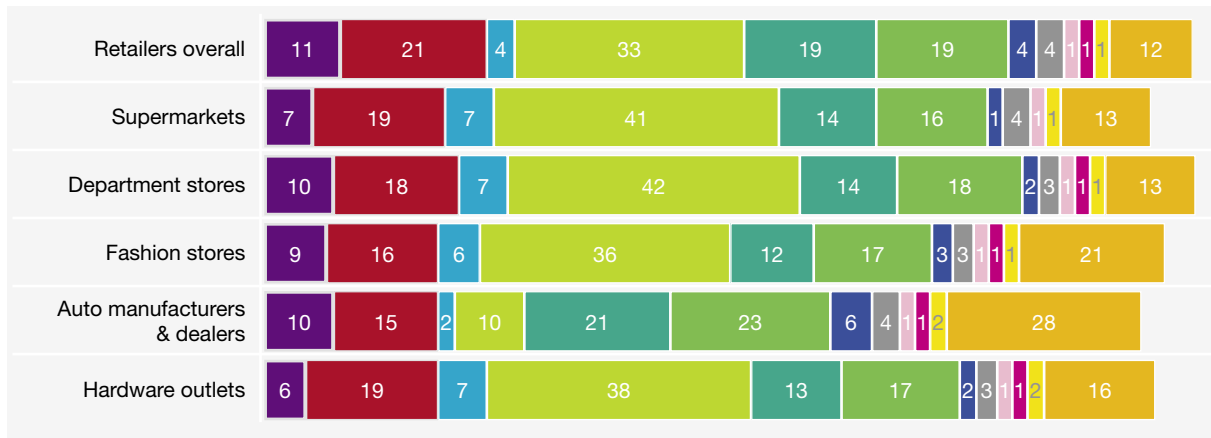
For the majority of the customers surveyed, the catalogue (whether unaddressed or personally addressed) is the preferred way to receive advertising and promotional communications from retailers, followed by unaddressed mail. The only exception is customers of automotive manufacturers/dealers with the greatest number of these respondents preferring no communications followed by newspaper and personalised mail, on a par at 20% and 19% respectively.



NB: Where percentages do not total 100%, some respondents provided multiple answers



Summary – when not a customer



Base: Sample = 500

Fig 42: Summary of Fig 45, Fig 49, Fig 53, Fig 57, Fig 61 and Fig 65 illustrating the preferred media for receiving advertising or promotional information from retailers when not a customer

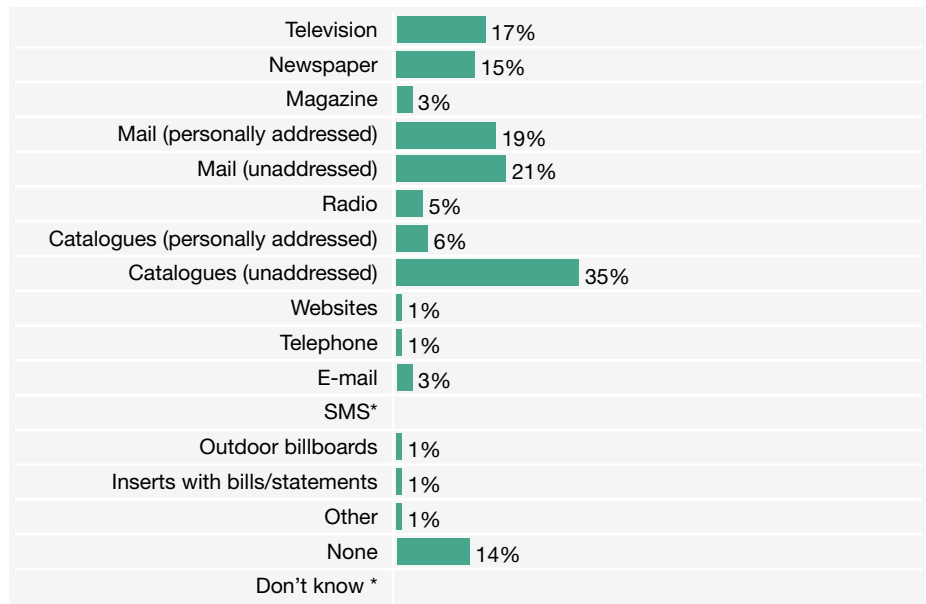
Analysis:

The catalogue (whether unaddressed or personally addressed) is also the preferred way for non-customers to receive offers from retailers. Once again, the only exception is auto manufacturers/dealers where the greatest group, over a quarter of the non-customers surveyed, prefer to receive no communications. However, this could just be indicative of the number of people in the market to purchase a vehicle at any given time



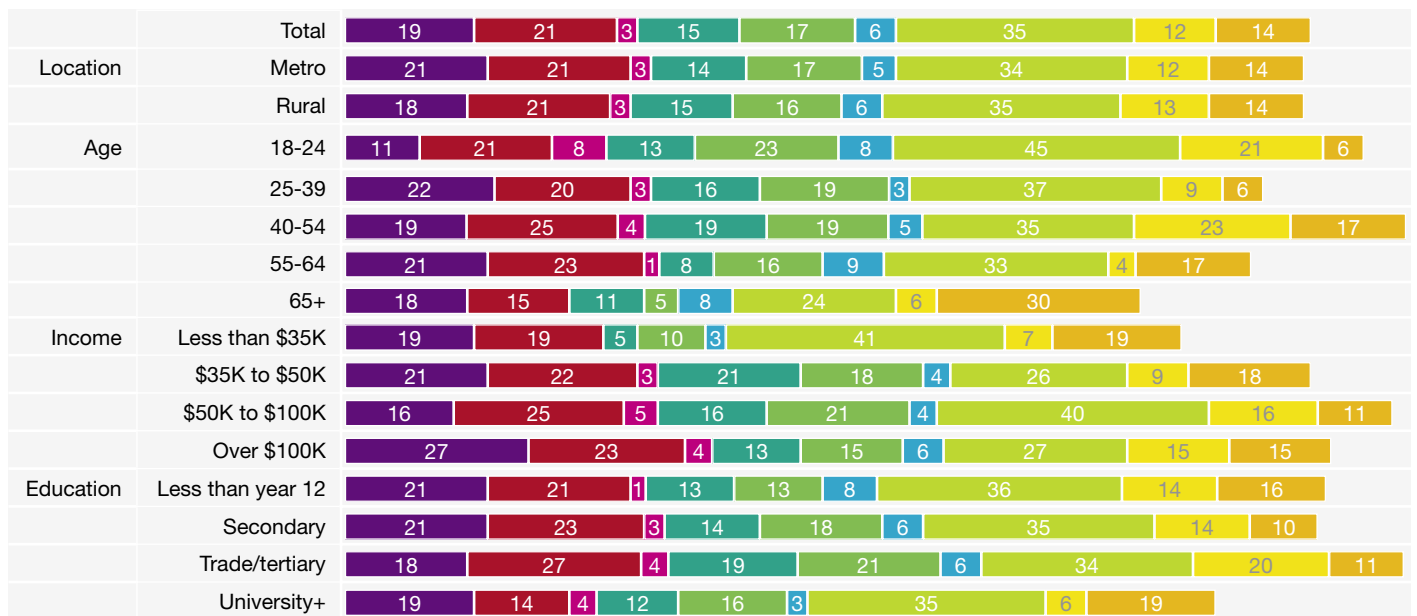
Preferred media for receiving advertising and promotional information from the retail sector – customers and non-customers

Retailers – when a customer

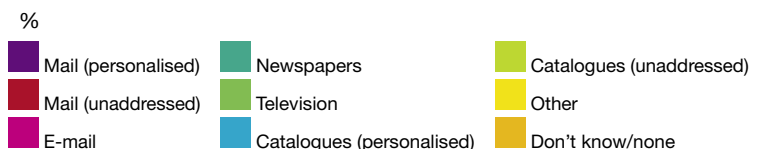


Base: Sample = 508
 Fig 43: The preferred media for receiving advertising or promotional information from retailers overall when a customer

By demographics



Base: Sample = 508
 Fig 44: Demographics for the preferred media for receiving advertising or promotional information from retailers overall when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

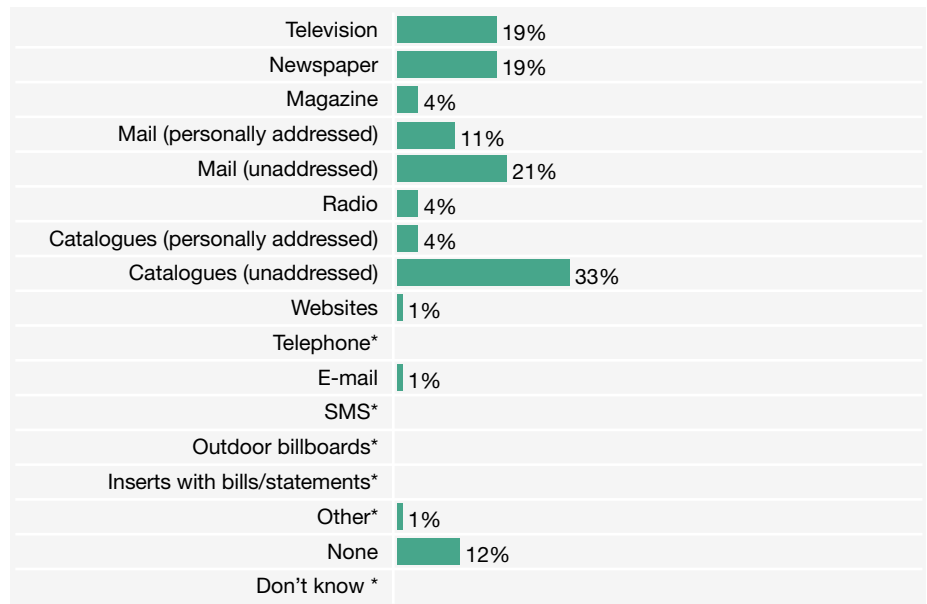


Analysis:

Unaddressed catalogue is overwhelmingly the preferred medium with retail customers and non-customers alike, favoured by more than a third of the respondents surveyed. Unaddressed mail is the second most preferred medium accounting for more than one-fifth of customers and non-customers. With both groups combined, more than half the respondents prefer to receive non-personalised advertising and promotions from retailers delivered in their letterboxes.

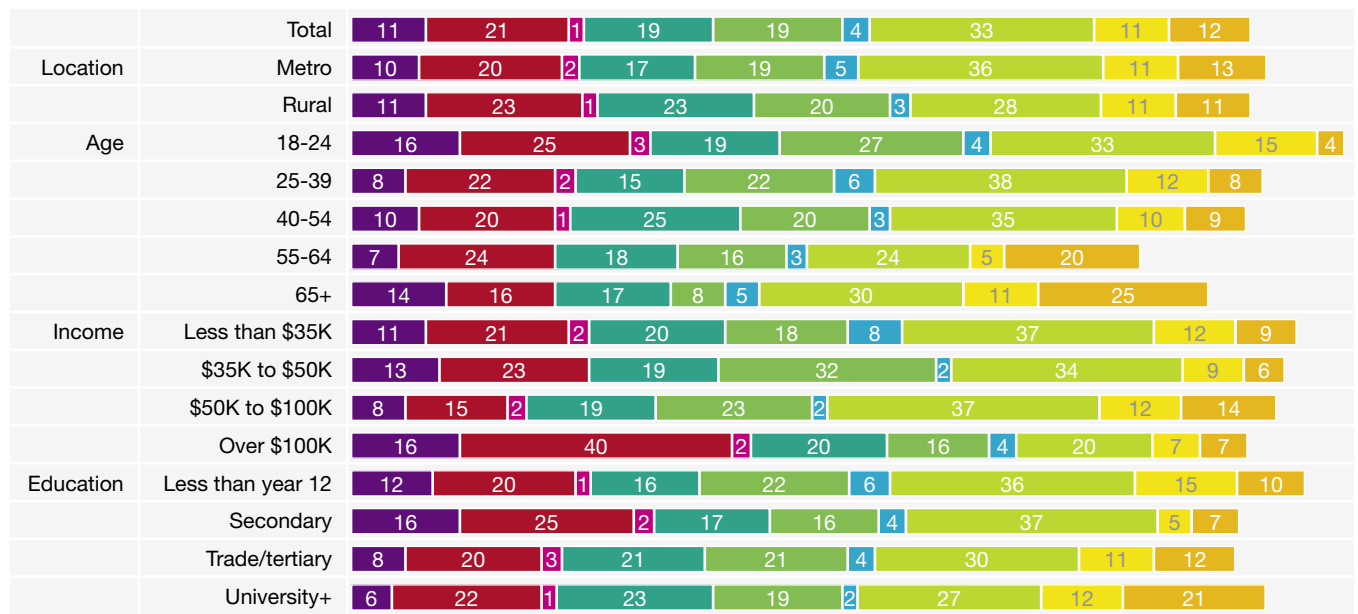
While personally addressed mail is the third most popular medium with retail customers, it is perhaps surprising that personalised communications are not preferred more, as they are with other industries. This might be explained by the fact that customers have become conditioned to receiving unaddressed communications from retailers. Even so, when personalised mail and addressed catalogues are combined, they account for over a quarter of the customers surveyed, highlighting a potential opportunity for retailers to recognise customers and perhaps build closer relationships.

Retailers – when not a customer

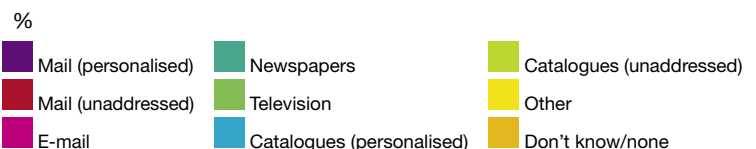


Base: Sample = 500
Fig 45: The preferred media for receiving advertising or promotional information from retailers overall when a non-customer

By demographics

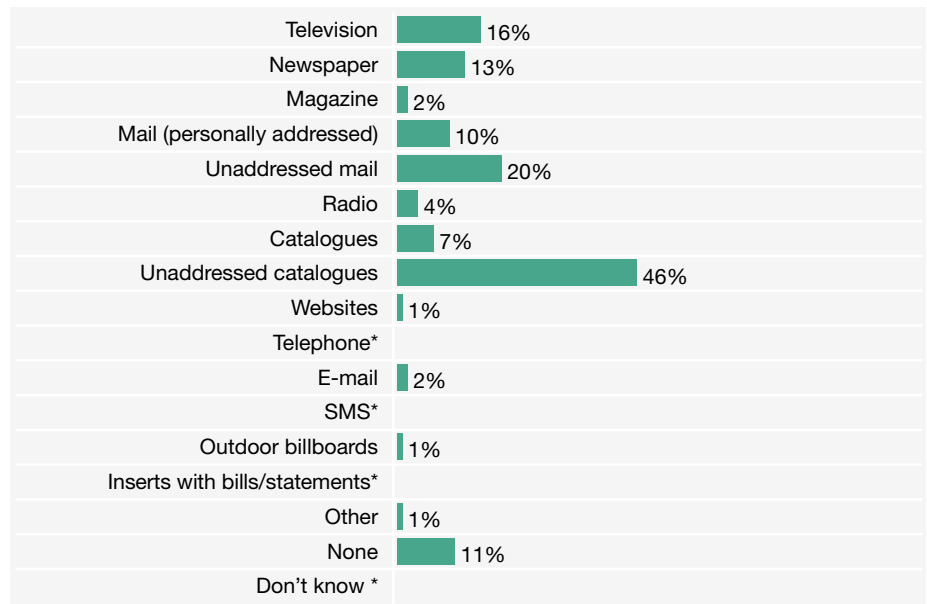


Base: Sample = 500
Fig 46: Demographics for the preferred media for receiving advertising or promotional information from retailers overall when a non-customer



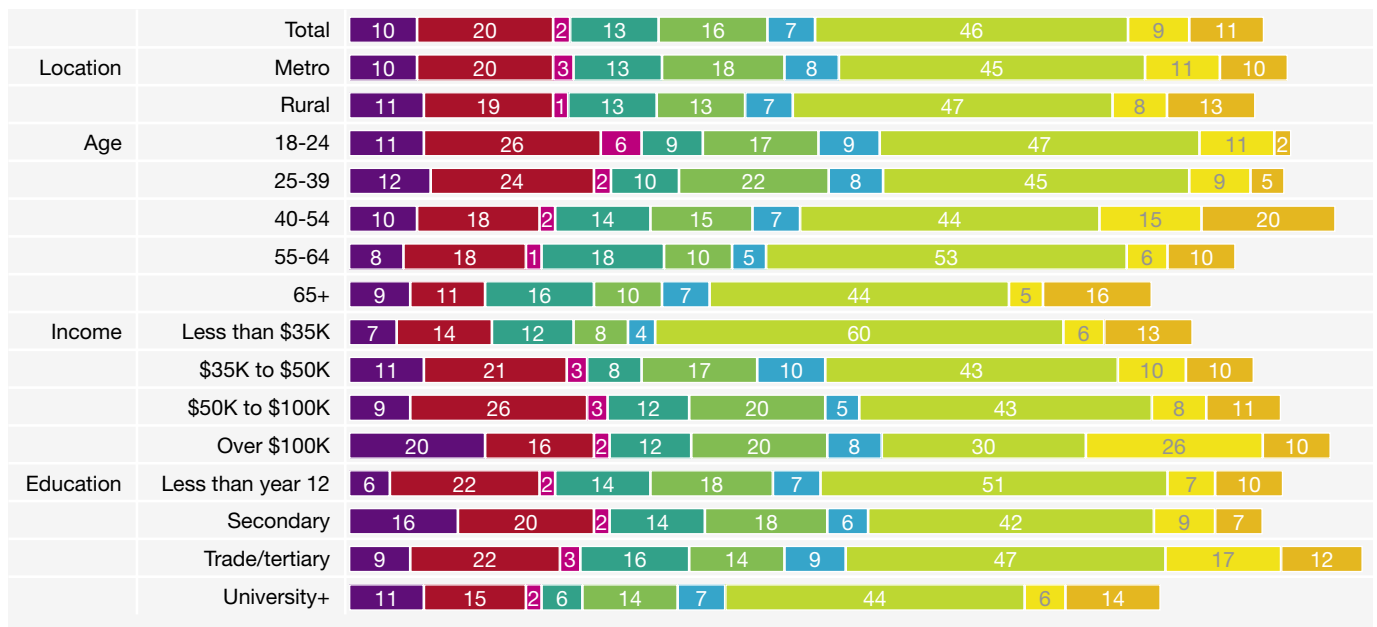
Preferred media for receiving advertising and promotional information from the retail sector – customers and non-customers

Supermarkets – when a customer

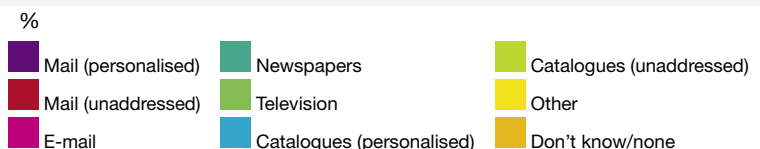


Base: Sample = 508
Fig 47: The preferred media for receiving advertising or promotional information from supermarkets when a customer

By demographics



Base: Sample = 508
Fig 48: Demographics for the preferred media for receiving advertising or promotional information from supermarkets when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
* Indicates the result was less than 1%

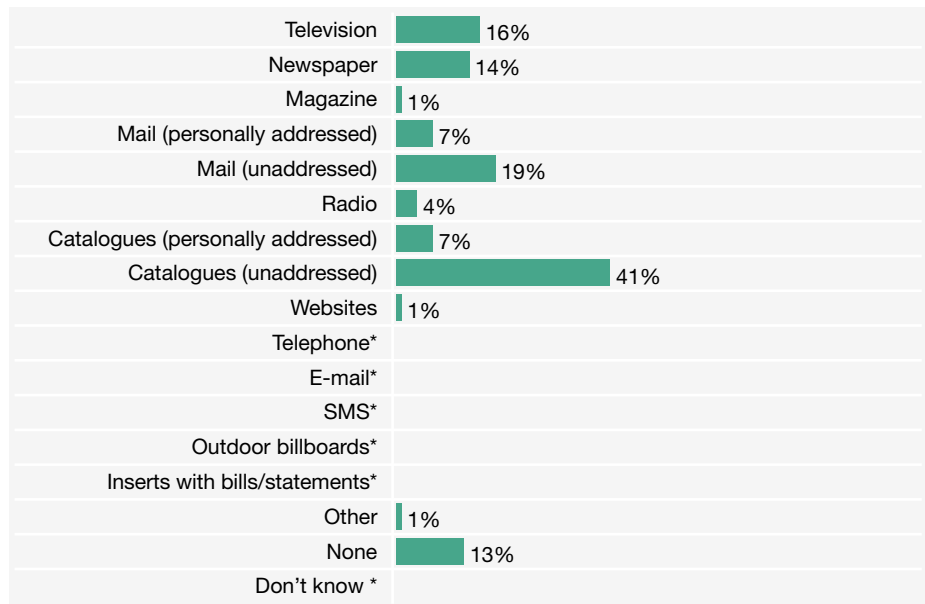


Analysis:

For supermarket customers and non-customers, unaddressed catalogue is the favourite medium, preferred by 46% and 41% respectively. This is followed by unaddressed mail. Overall, six out of ten respondents prefer to receive advertising

and promotions from supermarkets via unaddressed communications delivered to their letterboxes. Even with the introduction of on-line shopping, electronic media barely rates a mention.

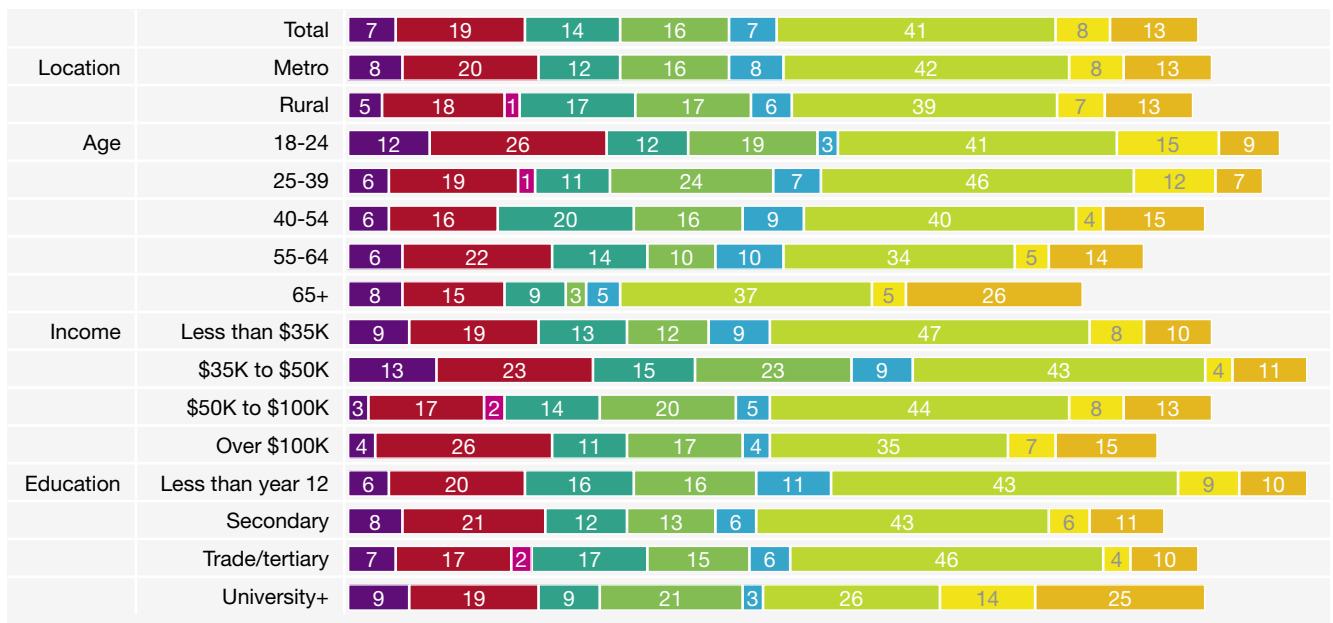
Supermarkets – when not a customer



Base: Sample = 500

Fig 49: The preferred media for receiving advertising or promotional information from supermarkets when a non-customer

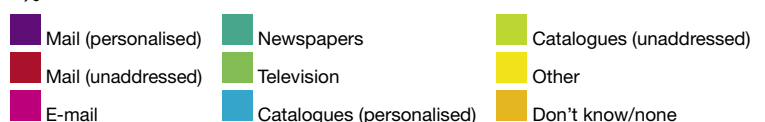
By demographics



Base: Sample = 500

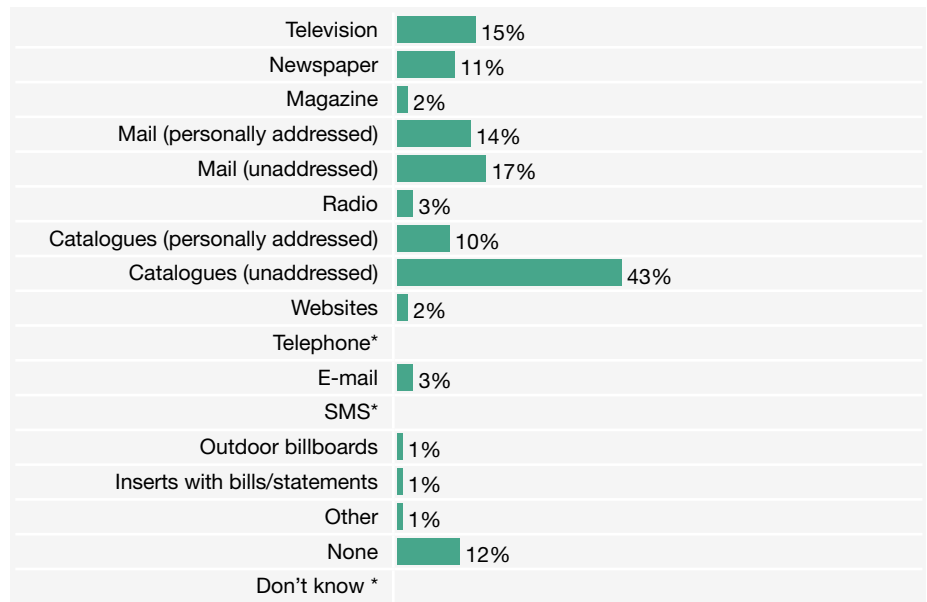
Fig 50: Demographics for the preferred media for receiving advertising or promotional information from supermarkets when a non-customer

%



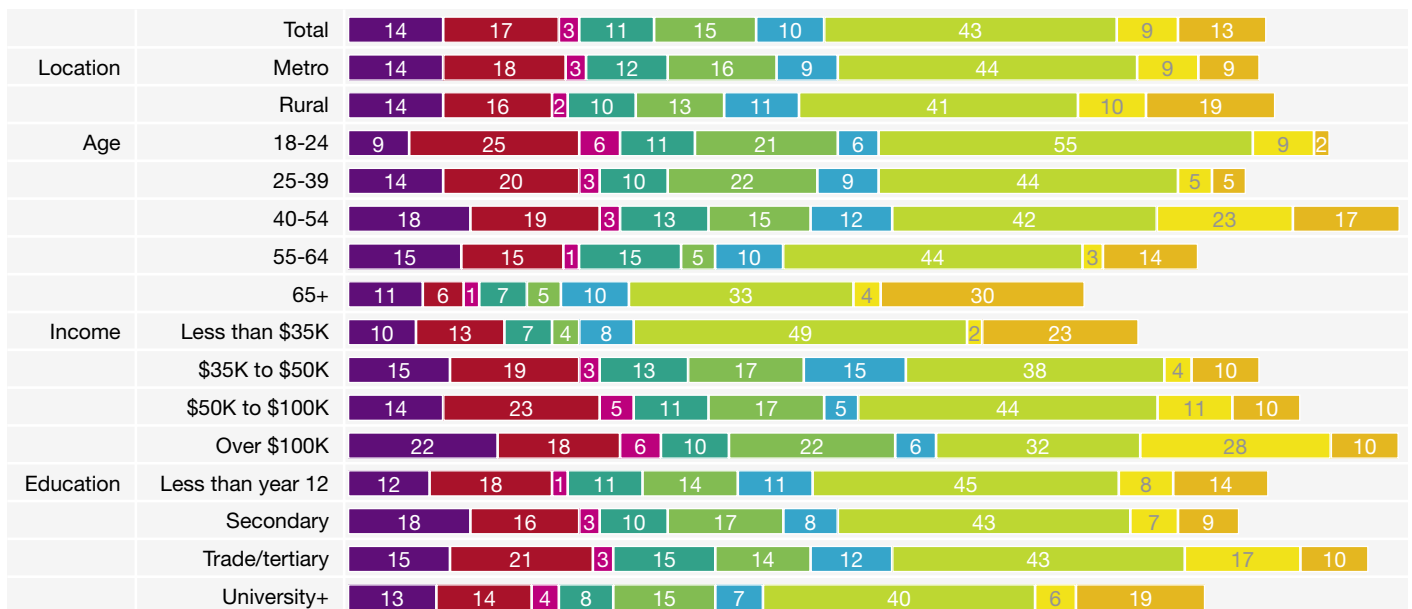
Preferred media for receiving advertising and promotional information from the retail sector – customers and non-customers

Department stores – when a customer

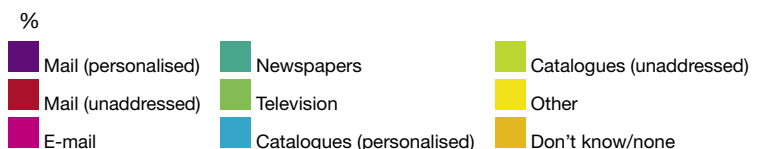


Base: Sample = 508
 Fig 51: The preferred media for receiving advertising or promotional information from department stores when a customer

By demographics



Base: Sample = 508
 Fig 52: Demographics for the preferred media for receiving advertising or promotional information from department stores when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

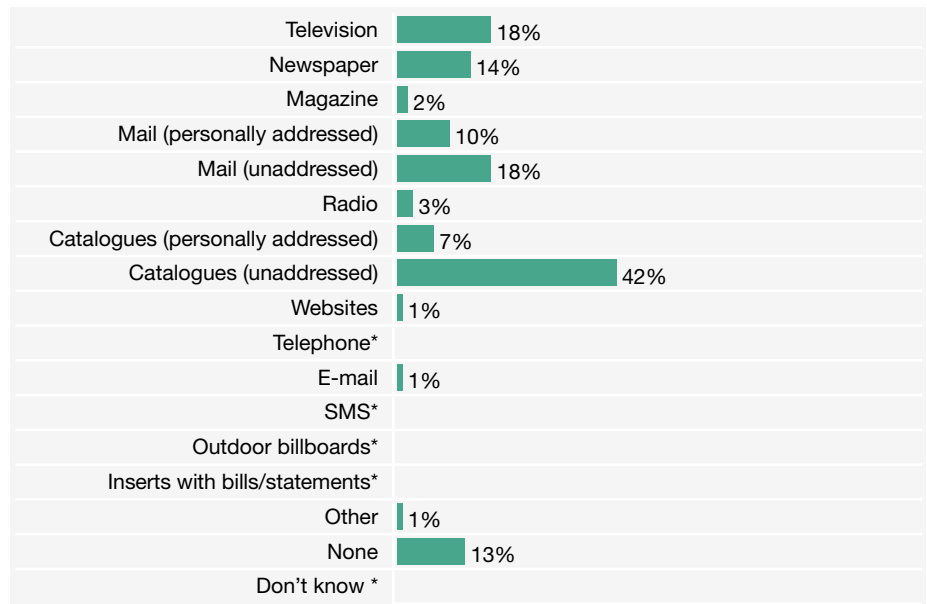


Analysis:

Unaddressed catalogue is also the favourite medium with almost half the department store customers and non-customers surveyed. When figures for unaddressed catalogues are combined with unaddressed mail, six out of ten customers and non-customers prefer to receive non-personalised communications from department stores, making the letterbox drop more popular than broadcast, press, magazine and

electronic media combined. Personalised mail also rates well and when combined with addressed catalogues is favoured by almost a quarter (24%) of customers as well as 17% of non-customers, – on a par with television at 18%. As such, the mail in all its forms is preferred by well over three-quarters of the department store customers and non-customers surveyed.

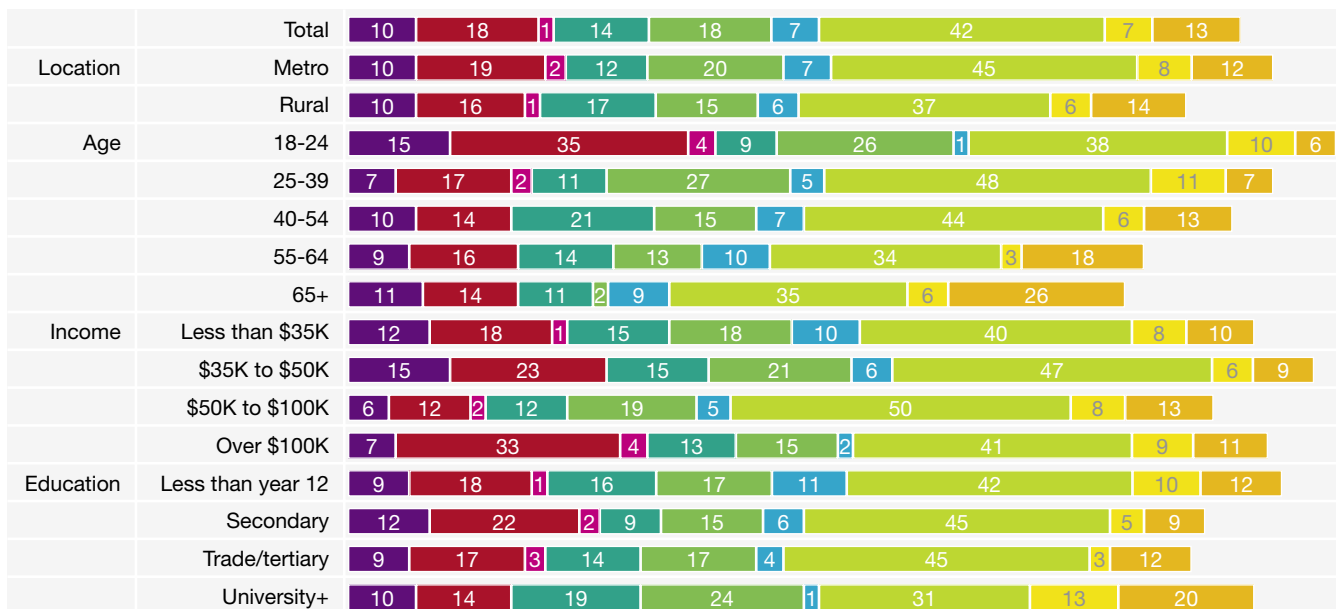
Department stores – when not a customer



Base: Sample = 500

Fig 53: The preferred media for receiving advertising or promotional information from department stores when a non-customer

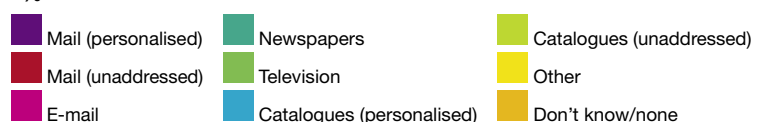
By demographics



Base: Sample = 500

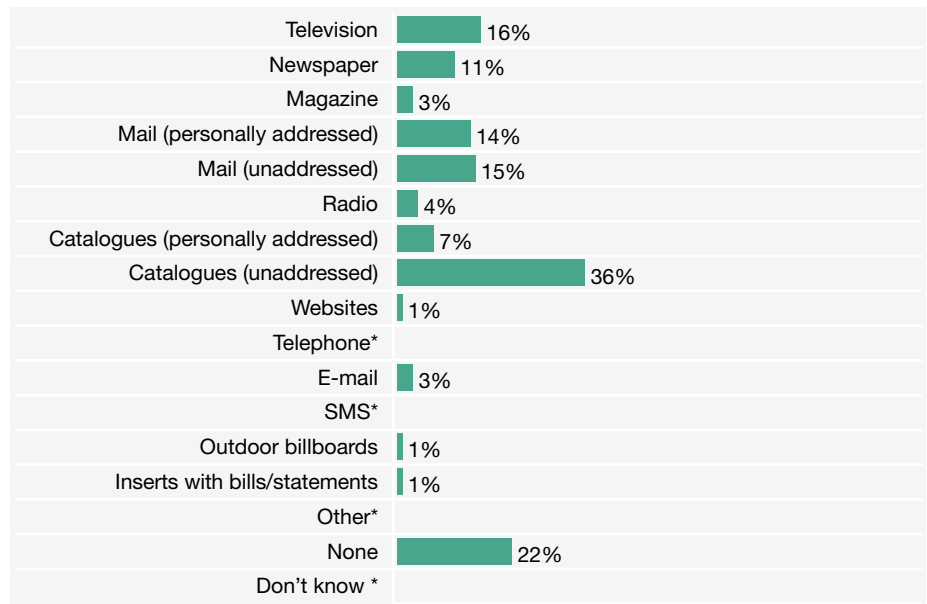
Fig 54: Demographics for the preferred media for receiving advertising or promotional information from department stores when a non-customer

%



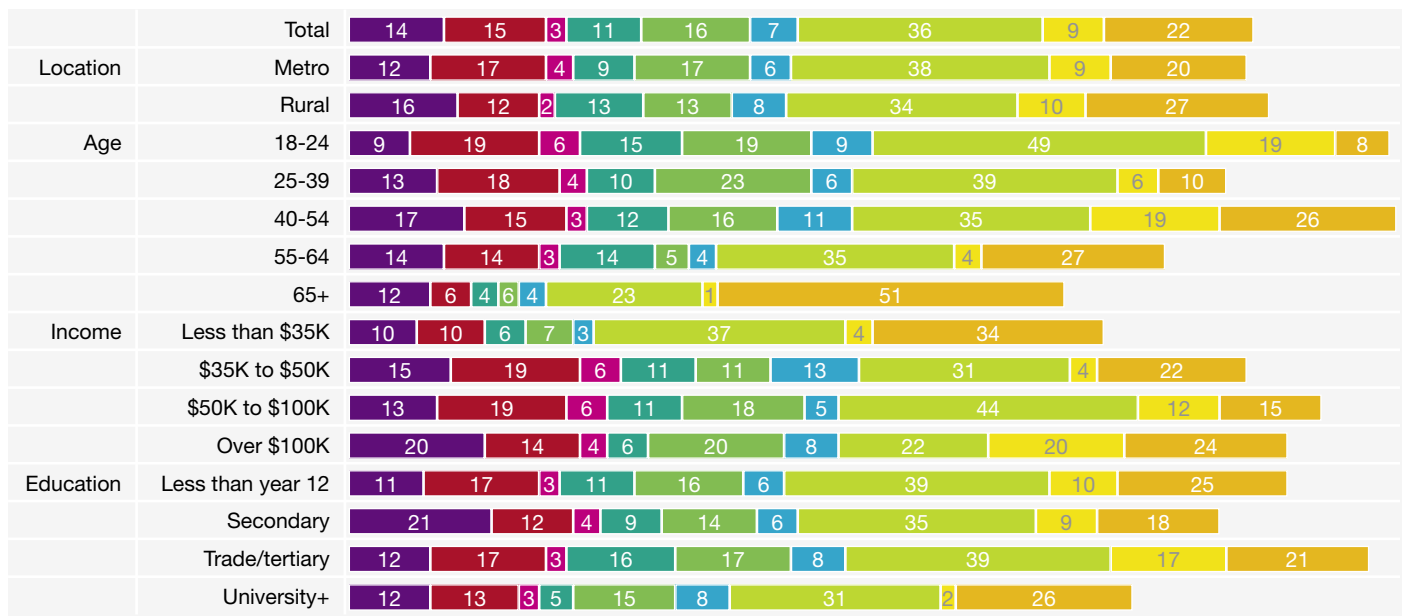
Preferred media for receiving advertising and promotional information from the retail sector – customers and non-customers

Fashion stores – when a customer

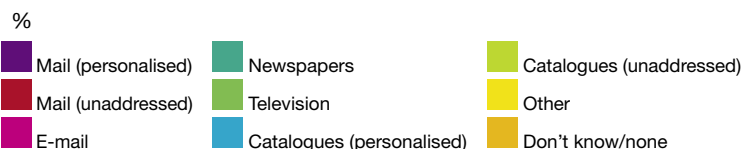


Base: Sample = 508
 Fig 55: The preferred media for receiving advertising or promotional information from fashion stores when a customer

By demographics



Base: Sample = 508
 Fig 56: Demographics for the preferred media for receiving advertising or promotional information from fashion stores when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

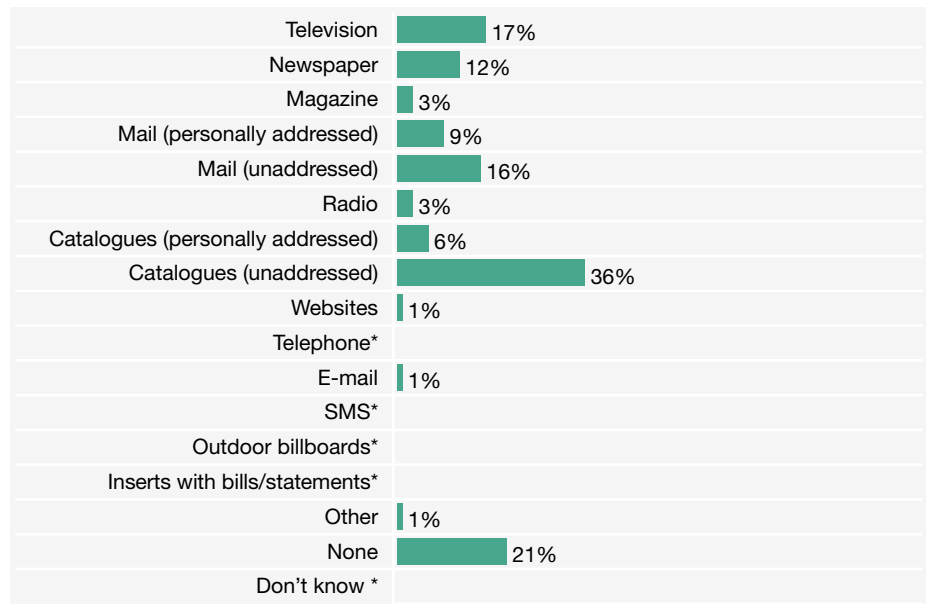


Analysis:

Unaddressed catalogue is the favourite medium for more than a third of the fashion store customers and non-customers. When figures for unaddressed catalogues are combined with unaddressed mail, more than half the customers and non-customers surveyed want fashion stores to send them non-personalised advertising and promotions delivered to their letterboxes. Personalised communications also rate well.

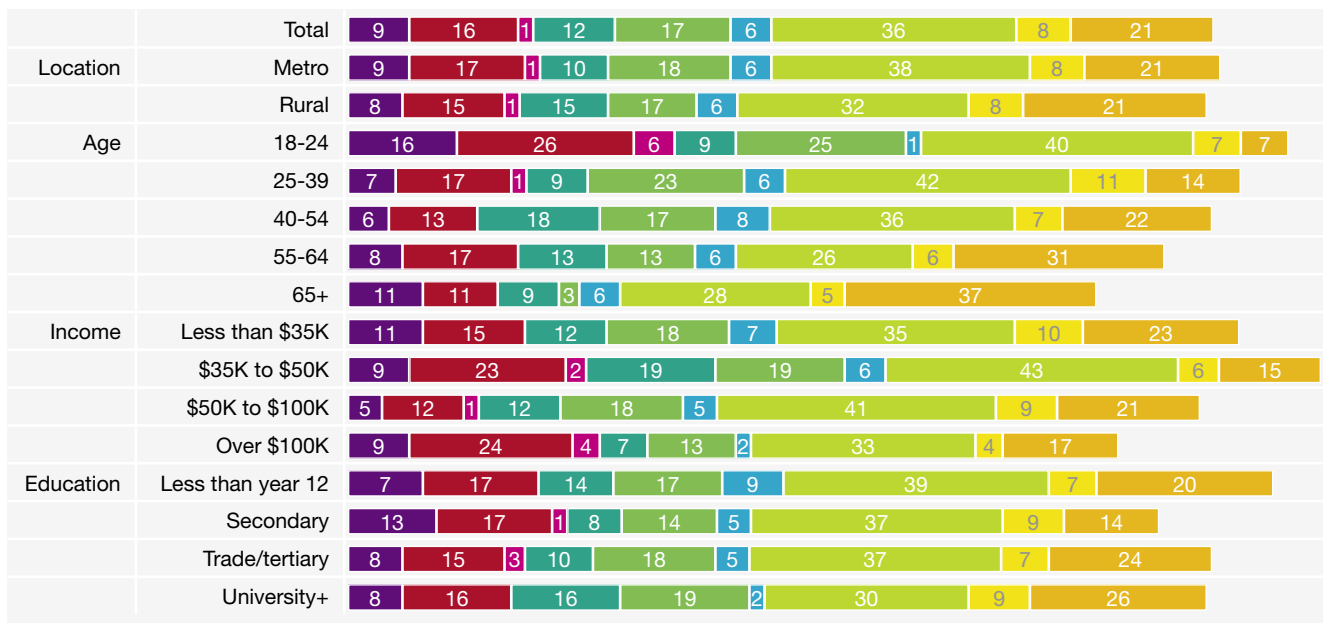
In fact, personalised mail and addressed catalogues combined are preferred by 21% of customers (compared with 16% for television) and 15% of non-customers (on a par with television at 17%). Surprisingly, the 'None' category is relatively high in this sector, accounting for just over one-fifth of the customers and non-customers surveyed.

Fashion stores – when not a customer

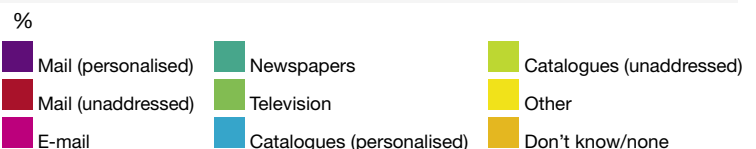


Base: Sample = 500
Fig 57: The preferred media for receiving advertising or promotional information from fashion stores when a non-customer

By demographics

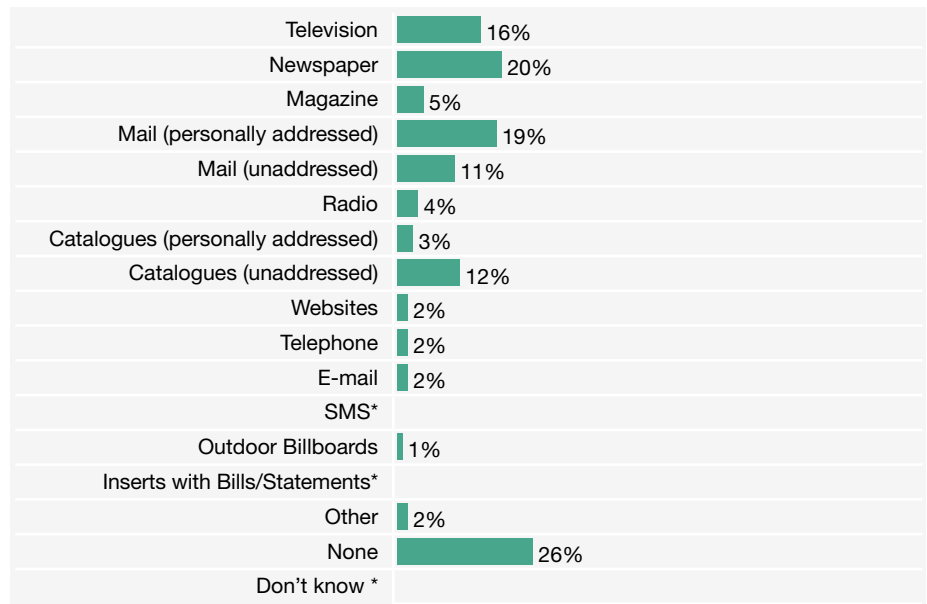


Base: Sample = 500
Fig 58: Demographics for the preferred media for receiving advertising or promotional information from fashion stores when a non-customer



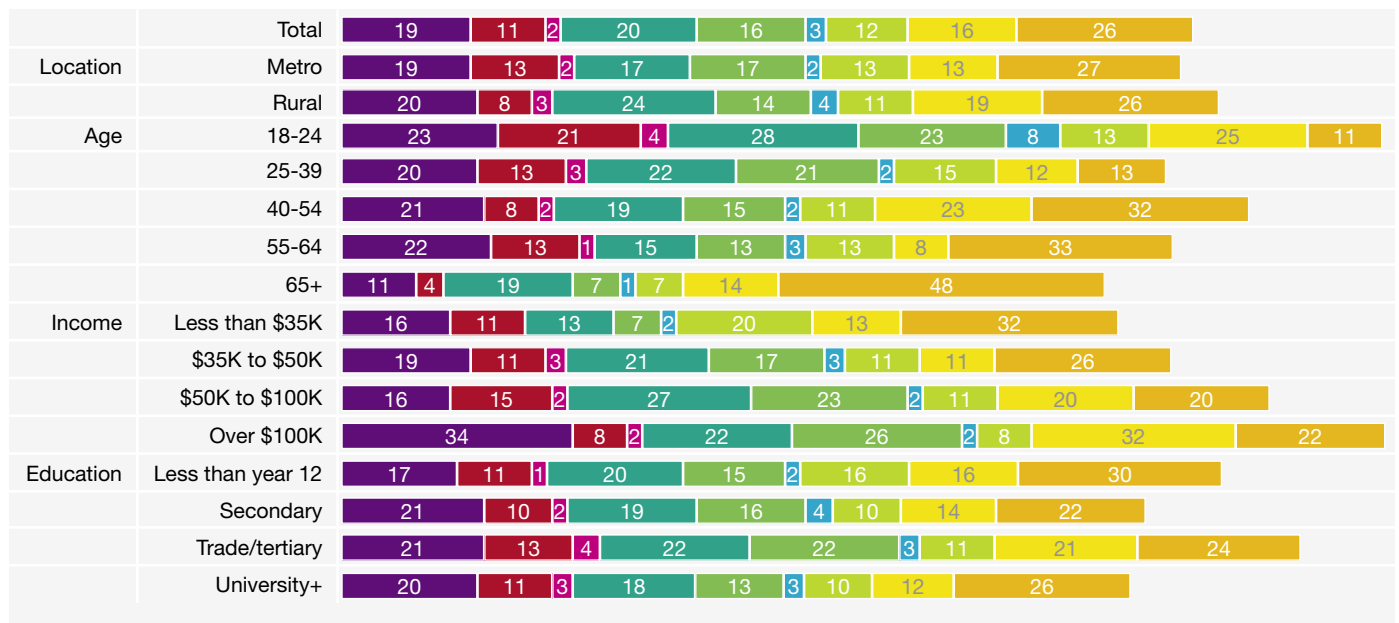
Preferred media for receiving advertising and promotional information from the retail sector – customers and non-customers

Automotive manufacturers and dealers – when a customer

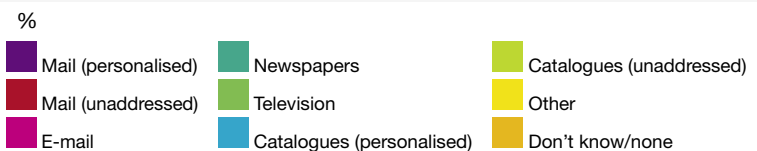


Base: Sample = 508
 Fig 59: The preferred media for receiving advertising or promotional information from automotive manufacturers/retailers when a customer

By demographics



Base: Sample = 508
 Fig 60: Demographics for the preferred media for receiving advertising or promotional information from automotive manufacturers/retailers when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

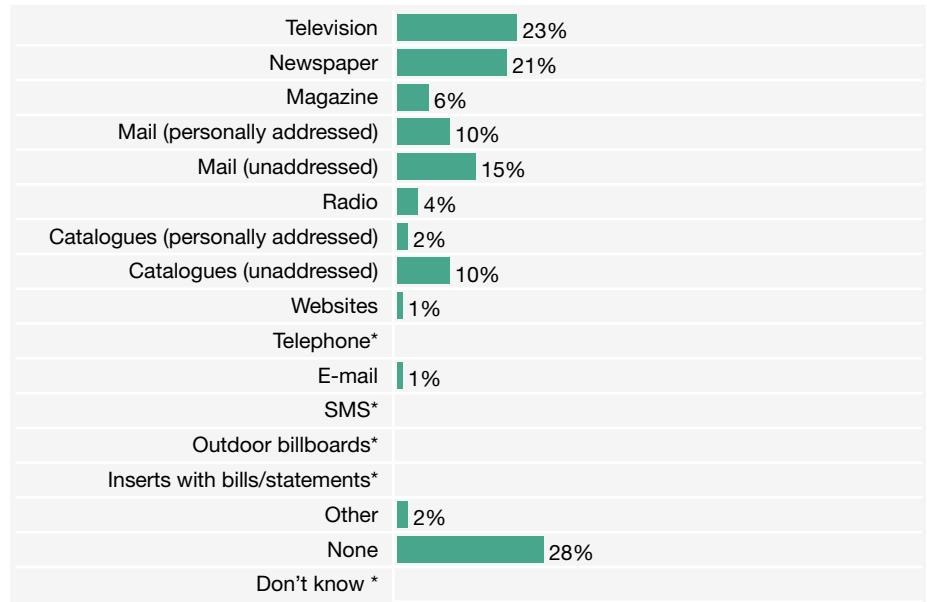


Analysis:

The highest percentage of customers and non-customers, over a quarter of those surveyed, prefer to receive no advertising or promotions from automotive manufacturers and dealers. However, it is worth noting that, of those who stated 'None', 56% were 55+ and 39% earn less than \$35K, indicating that age and income may be a contributing factor. Among customers who are interested, newspaper and personally

addressed mail were on a par at 20% and 19% respectively, but with a slightly higher preference for the post when data for personally addressed mail and personally addressed catalogues are combined (22%). While non-customers nominated television and newspaper as the most preferred media, letterbox drops should not be underestimated. In fact, unaddressed mail and unaddressed catalogues combined are the preferred means of receiving these types of communications by almost a quarter of customers and a quarter of the non-customers surveyed.

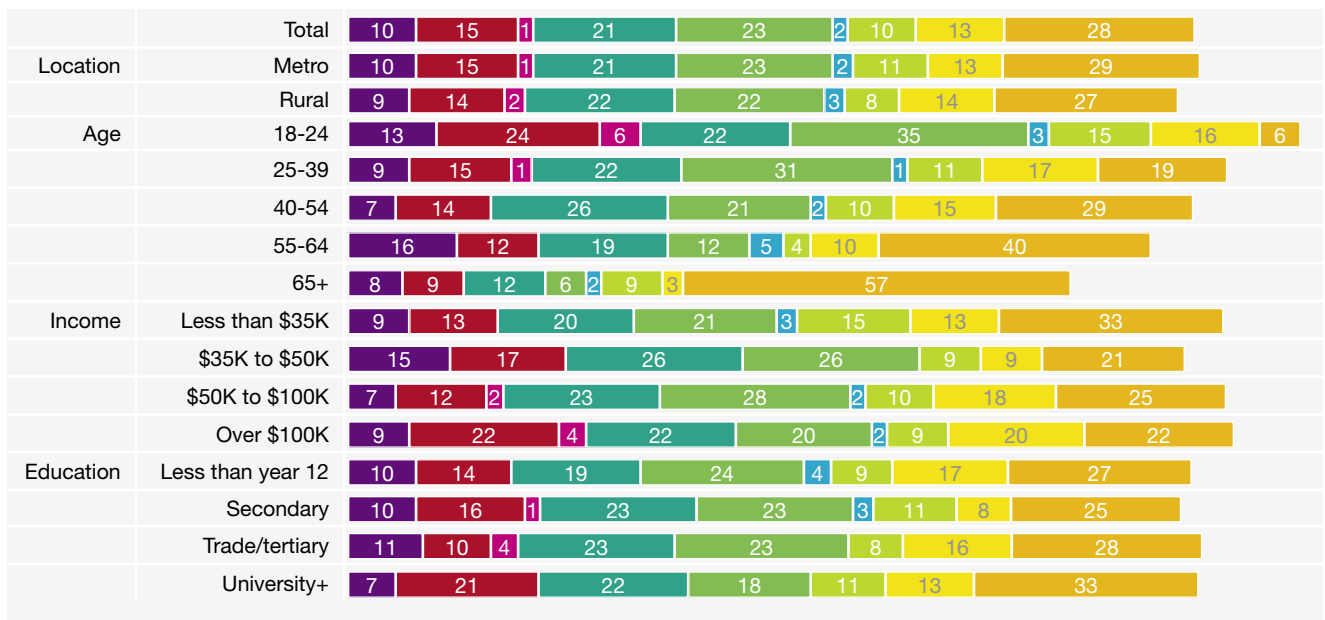
Automotive manufacturers and dealers – when not a customer



Base: Sample = 500

Fig 61: The preferred media for receiving advertising or promotional information from automotive manufacturers/retailers when a non-customer

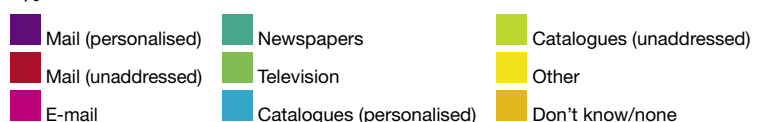
By demographics



Base: Sample = 500

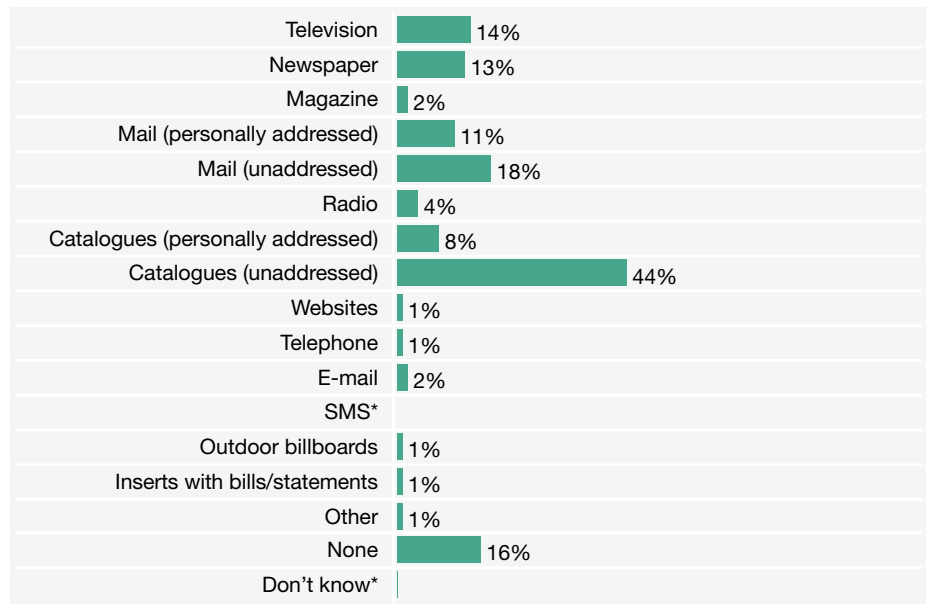
Fig 62: Demographics for the preferred media for receiving advertising or promotional information from automotive manufacturers/retailers when a non-customer

%



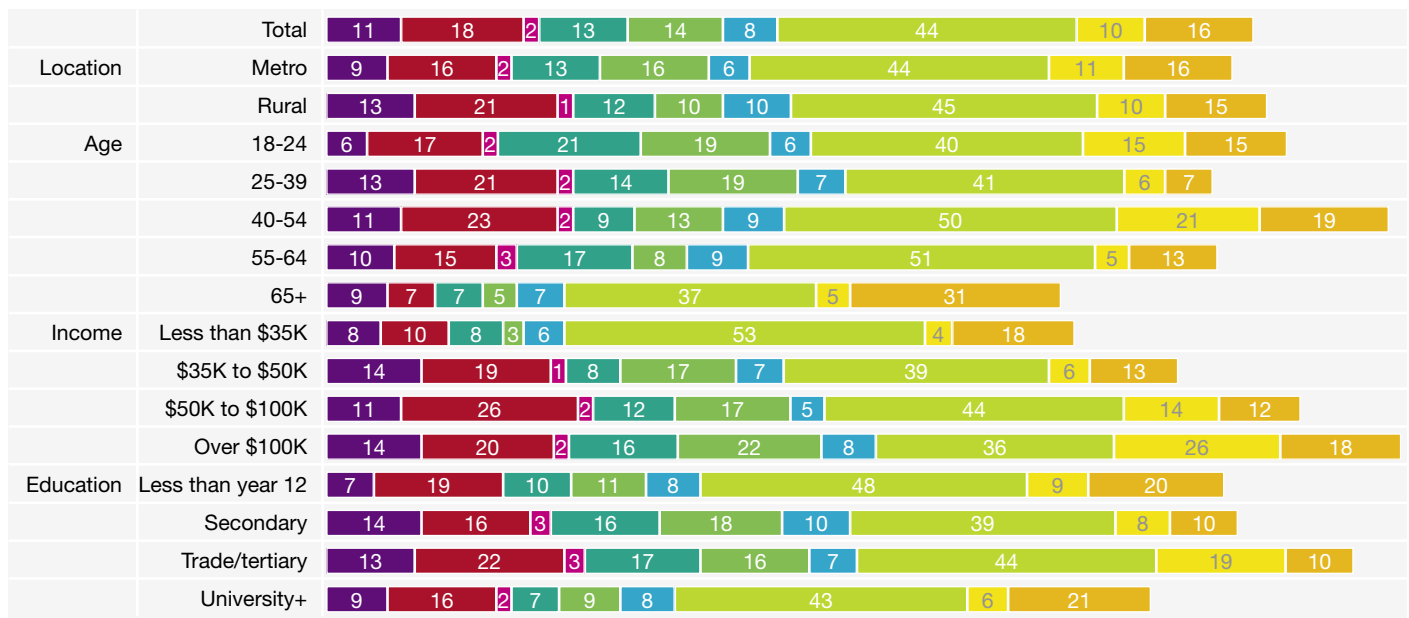
Preferred media for receiving advertising and promotional information from the retail sector – customers and non-customers

Hardware stores – when a customer

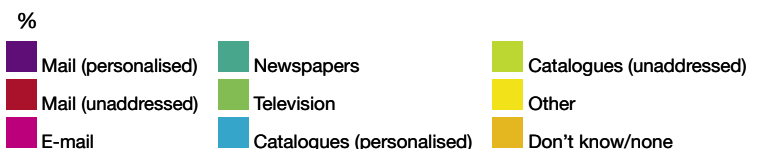


Base: Sample = 508
 Fig 63: The preferred media for receiving advertising or promotional information from hardware outlets when a customer

By demographics



Base: Sample = 508
 Fig 64: Demographics for the preferred media for receiving advertising or promotional information from hardware outlets when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%



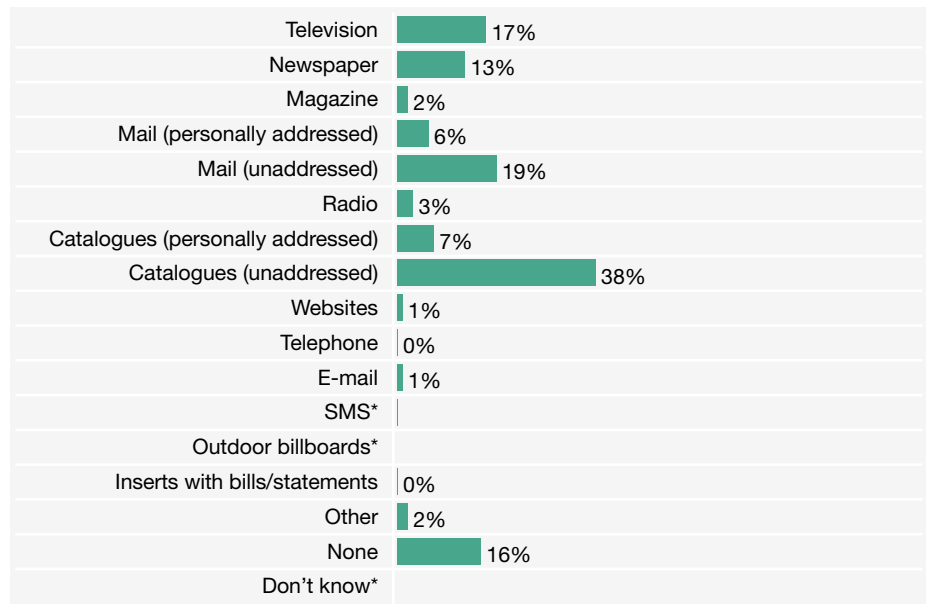
Analysis:

For customers and non-customers of hardware stores, unaddressed catalogue is the clear favourite, preferred by more respondents than television, press, magazine, radio and e-mail combined. When figures for unaddressed catalogue and unaddressed mail are tallied, non-personalised communications delivered to the letterbox are preferred by more than half the respondents surveyed. Personalised mail also rates well. Of the

customer group, 19% prefer personalised mail and addressed catalogues, a higher result than television and newspapers.

For non-customers, personalised mail and addressed catalogues combined account for 13% of respondents, which is slightly less than television and on a par with newspapers.

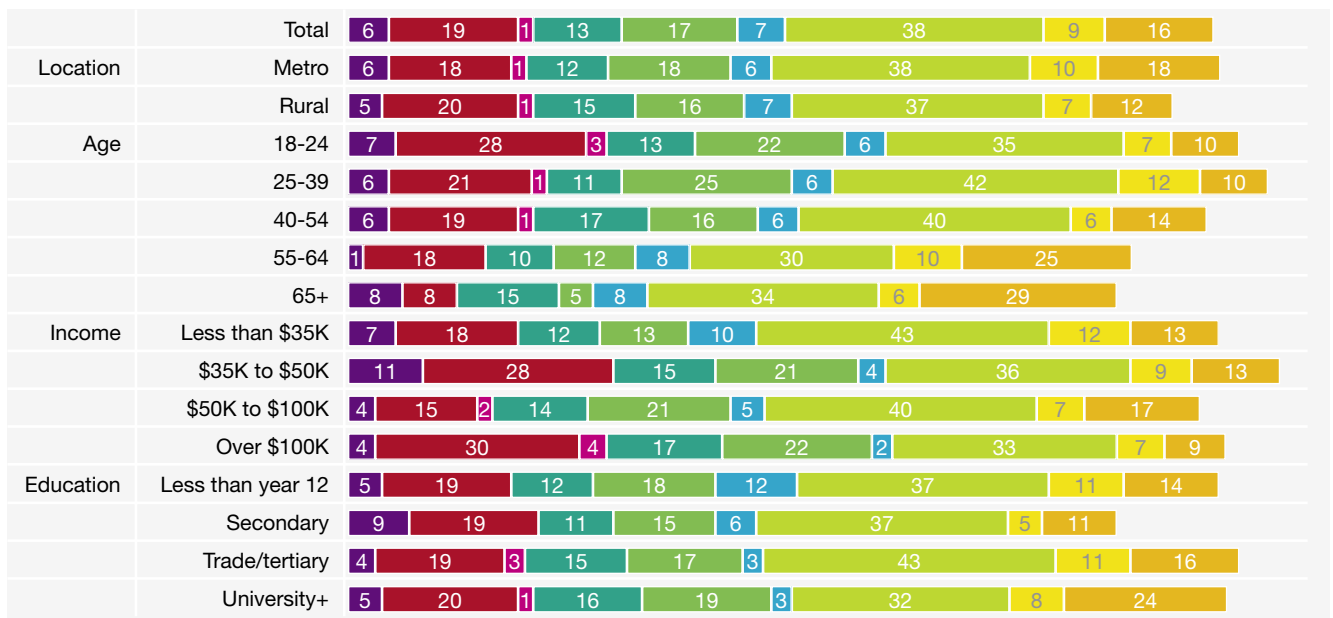
Hardware stores – when not a customer



Base: Sample = 500

Fig 65: The preferred media for receiving advertising or promotional information from hardware outlets when a non-customer

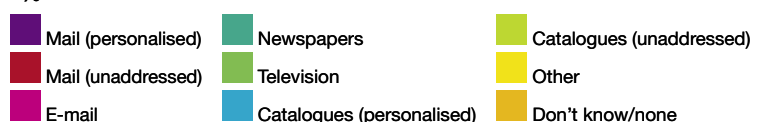
By demographics



Base: Sample = 500

Fig 66: Demographics for the preferred media for receiving advertising or promotional information from hardware outlets when a non-customer

%



Not-for-profit, government and clubs

Preferred media for receiving advertising and promotional information by industry – customers and non-customers

Not-for-profit, government and club advertising and promotions – supporters and non-supporters

The objective of this section was to explore how media preference for receiving advertising and promotional information varies for supporters and non-supporters of the following:

- Not-for-profit organisations
- Government
- Clubs

For each organisation, the supporter/non-supporter findings are elaborated upon with key demographic and socio-economic attributes of:

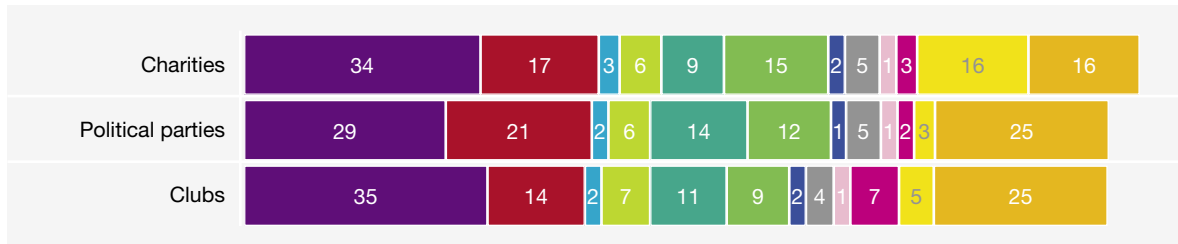
- Location (metro/rural)
- Age
- Income
- Education

In all, this in-depth analysis should assist those in these organisations on how to communicate offers to their current supporter base and to potential prospects.

Here are the findings.

Preferred media for receiving advertising and promotional information from the not-for-profit, government and club sector – supporters and non-supporters

Summary – when a supporter/member



Base: Sample = 508

Fig 67: Summary of Fig 69, Fig 73 and Fig 77 illustrating the preferred media for receiving advertising and promotional information from not-for-profit, government and clubs when a supporter/member

Analysis:

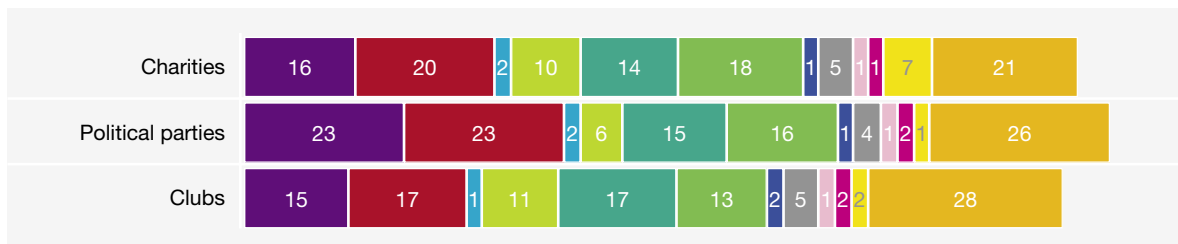
For receiving advertising and promotional communications from charities and clubs, over a third of the supporters surveyed nominated personalised mail as their preferred medium. It is much the same with political party supporters, with almost a third favouring personally addressed mail. Unaddressed mail also rates well with all supporters as the third most nominated medium.



NB: Where percentages do not total 100%, some respondents provided multiple answers



Summary – when not a supporter/member



Base: Sample = 500

Fig 68: Summary of Fig 71, Fig 75 and Fig 79 illustrating the preferred media for receiving advertising and promotional information from not-for-profit, government and clubs when not a support/member

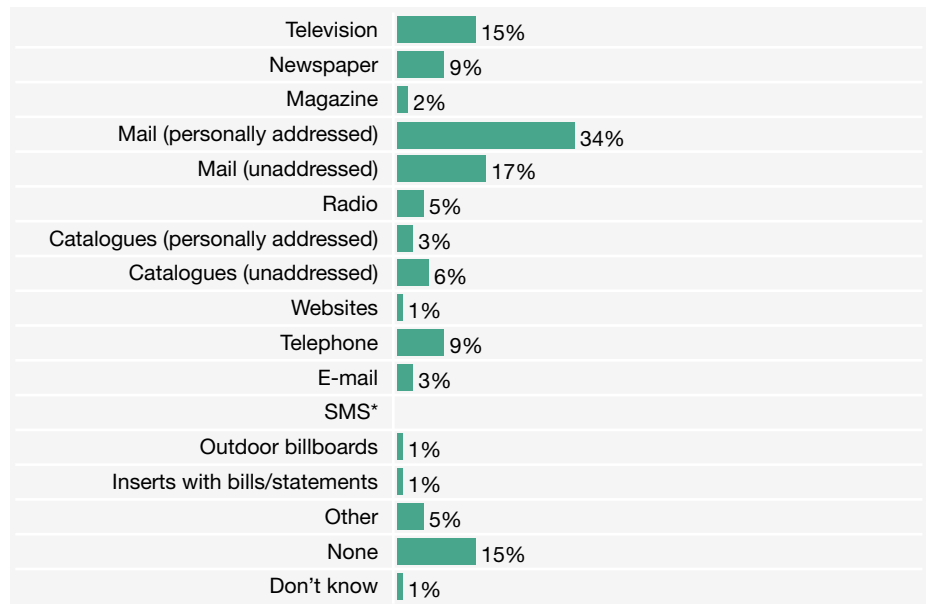
Analysis:

When the respondent is not a supporter of a charity, political party or club, 'None' was the most popular response. This finding is probably not surprising. Even so, a comparative number of non-supporters of charities chose unaddressed mail and this medium is also the second most popular for non-supporters of clubs. For political party communications, personally addressed mail and unaddressed mail are favoured by almost half (46%) of the non-supporters surveyed.



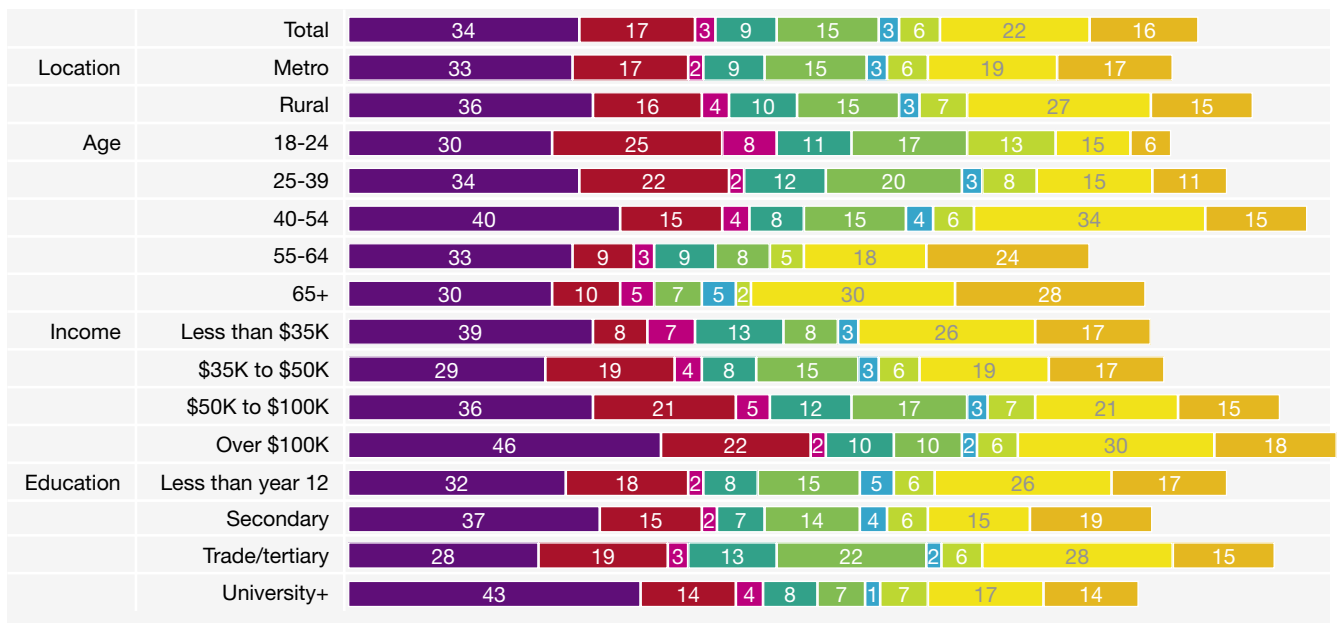
Preferred media for receiving advertising and promotional information from the not-for-profit, government and club sector – supporters and non-supporters

Charities – when a supporter/member

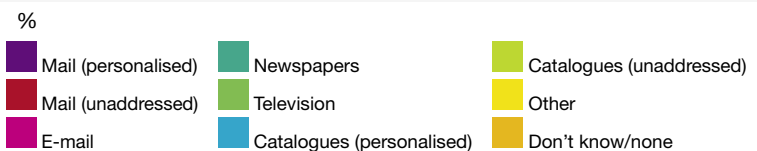


Base: Sample = 508
Fig 69: The preferred media for receiving advertising or promotional information from charities when a customer

By demographics



Base: Sample = 508
Fig 70: Demographics for the preferred media for receiving advertising or promotional information from charities when a customer



NB: Where percentages do not total 100%, some respondents provided multiple answers

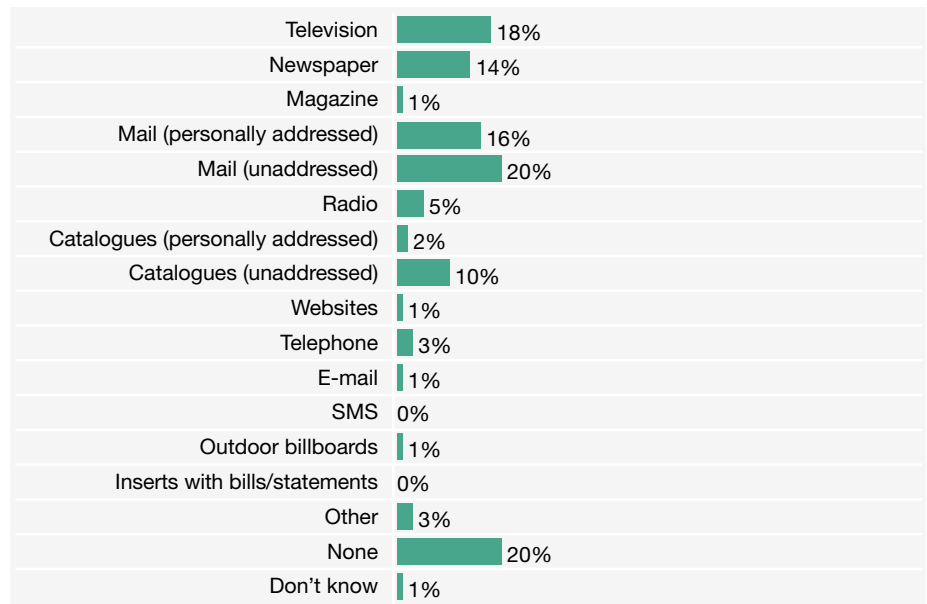


Analysis:

Personally addressed mail is overwhelmingly the most preferred medium with over a third of the charity supporters surveyed. In fact, personally addressed mail is twice as popular as unaddressed mail, the second most preferred medium, with television as the third most favoured medium. For non-supporters of charities, unaddressed mail is preferred

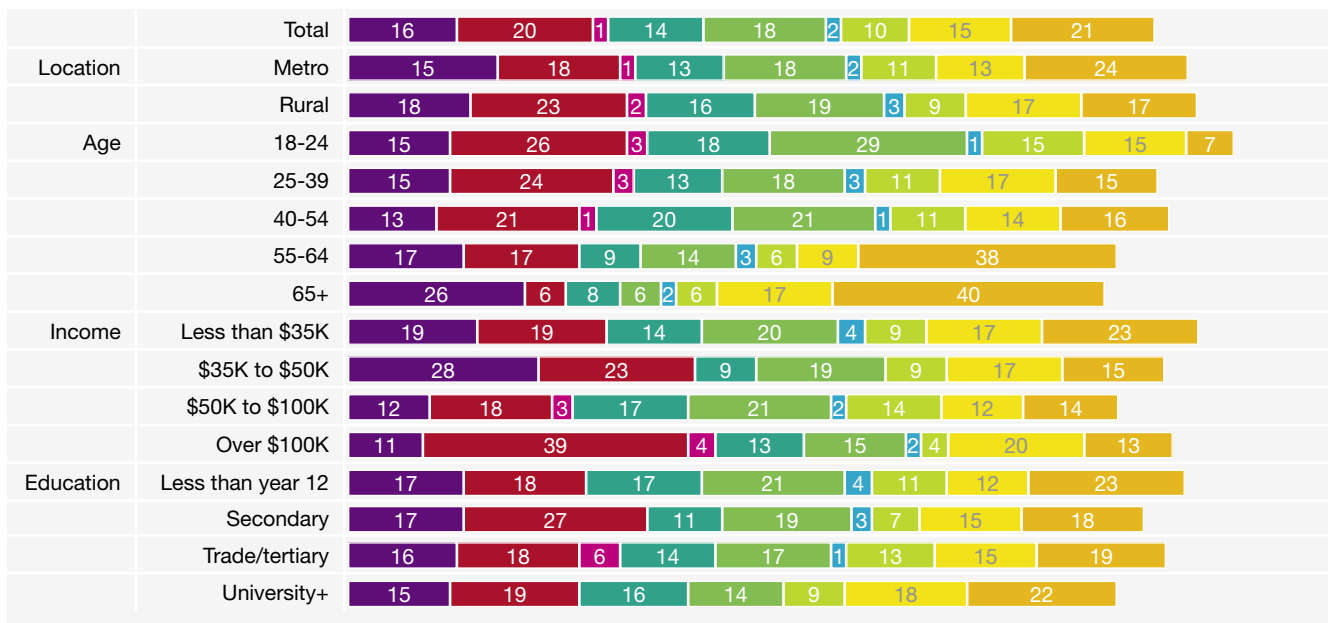
by one-fifth of the respondents, followed by television and personally addressed mail. It is worthwhile to note that a large proportion of non-donors preferred 'None'. This group is heavily skewed towards older, less affluent respondents of whom 50% are 55+ and 51% earn less than \$35K.

Charities – when not a supporter/member

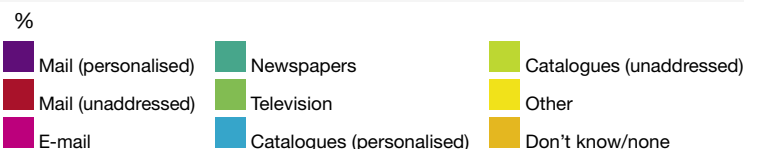


Base: Sample = 500
Fig 71: The preferred media for receiving advertising or promotional information from charities when a non-customer

By demographics

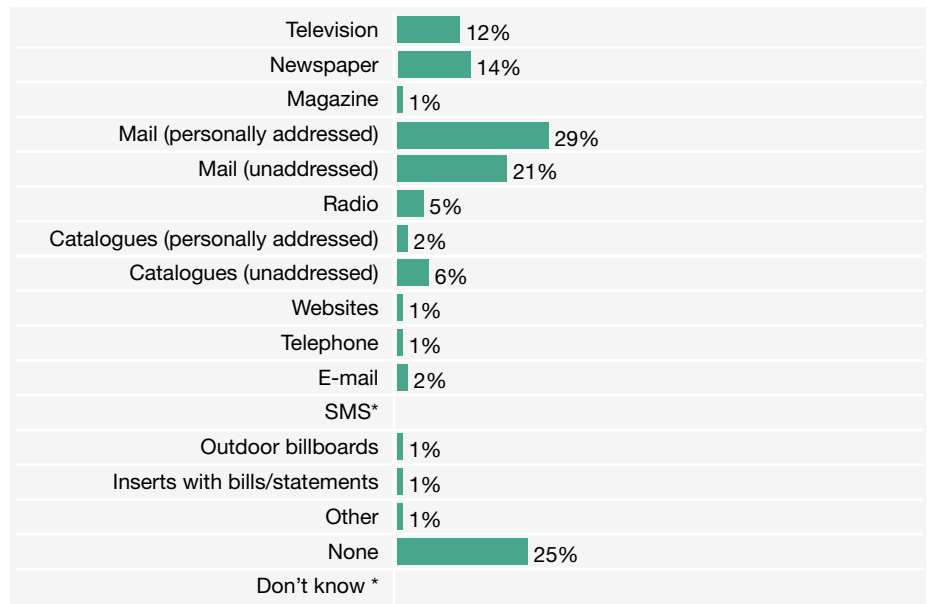


Base: Sample = 500
Fig 72: Demographics for the preferred media for receiving advertising or promotional information from charities when a non-customer



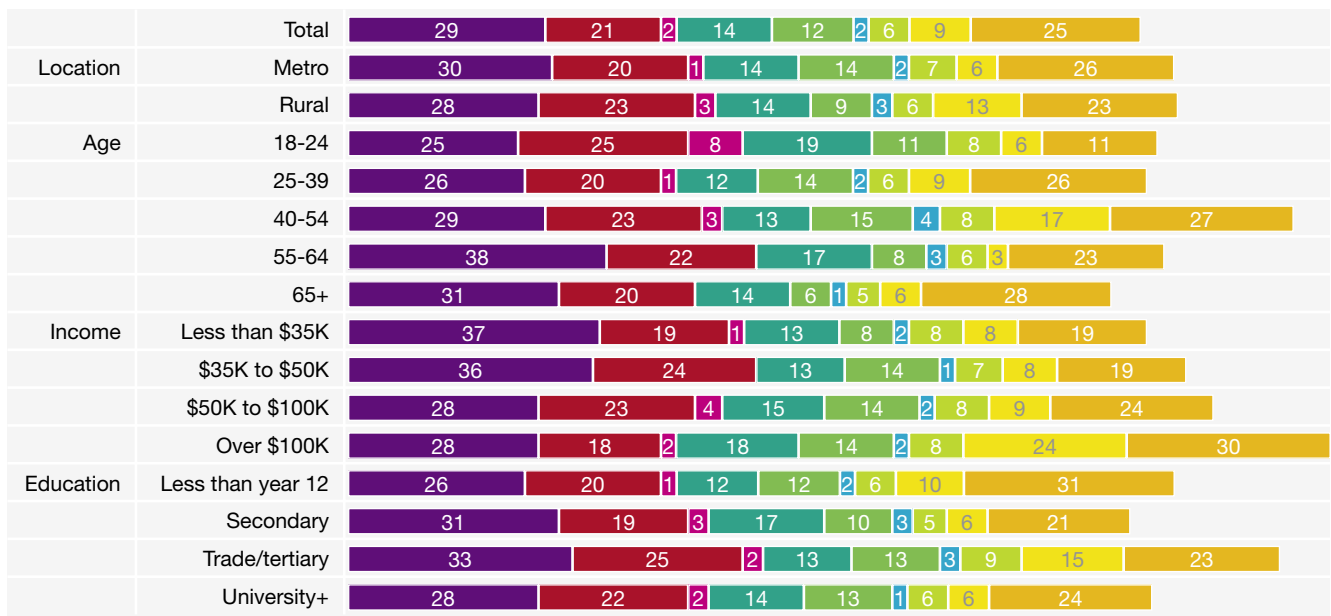
Preferred media for receiving advertising and promotional information from the not-for-profit, government and club sector – supporters and non-supporters

Political parties – when a supporter/member

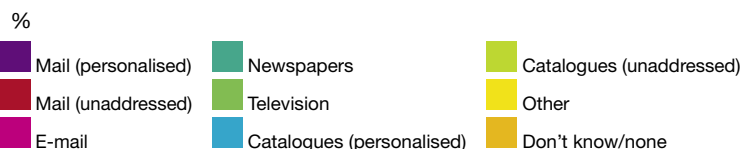


Base: Sample = 508
 Fig 73: The preferred media for receiving election information from political parties when a supporter

By demographics



Base: Sample = 508
 Fig 74: Demographics for the preferred media for receiving election information from political parties when a supporter



NB: Where percentages do not total 100%, some respondents provided multiple answers
 * Indicates the result was less than 1%

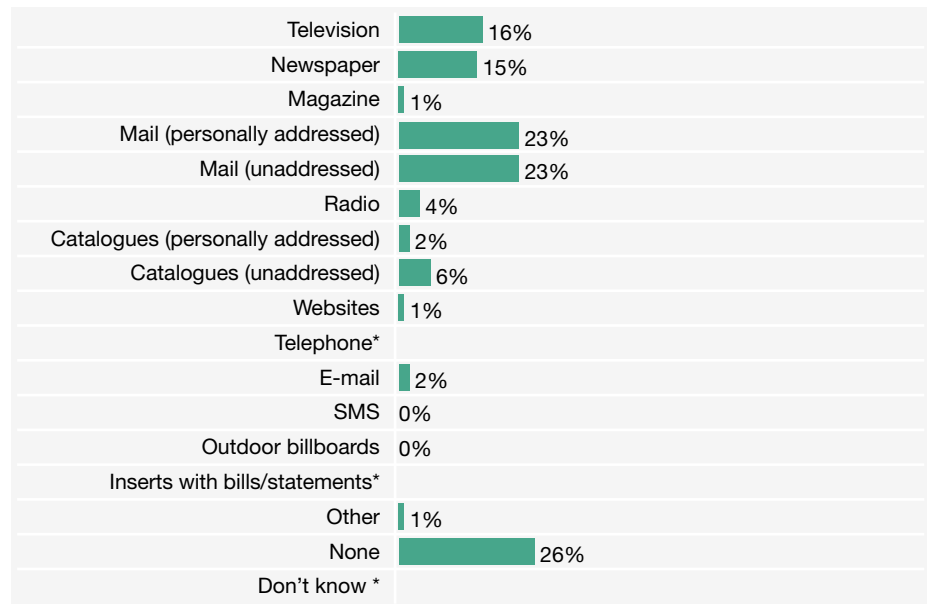


Analysis:

Personally addressed mail is the preferred medium for supporters of political parties, followed by unaddressed mail. In fact, the mail (both personally addressed and unaddressed) was favoured by half the supporters surveyed. For non-supporters interested in receiving political party

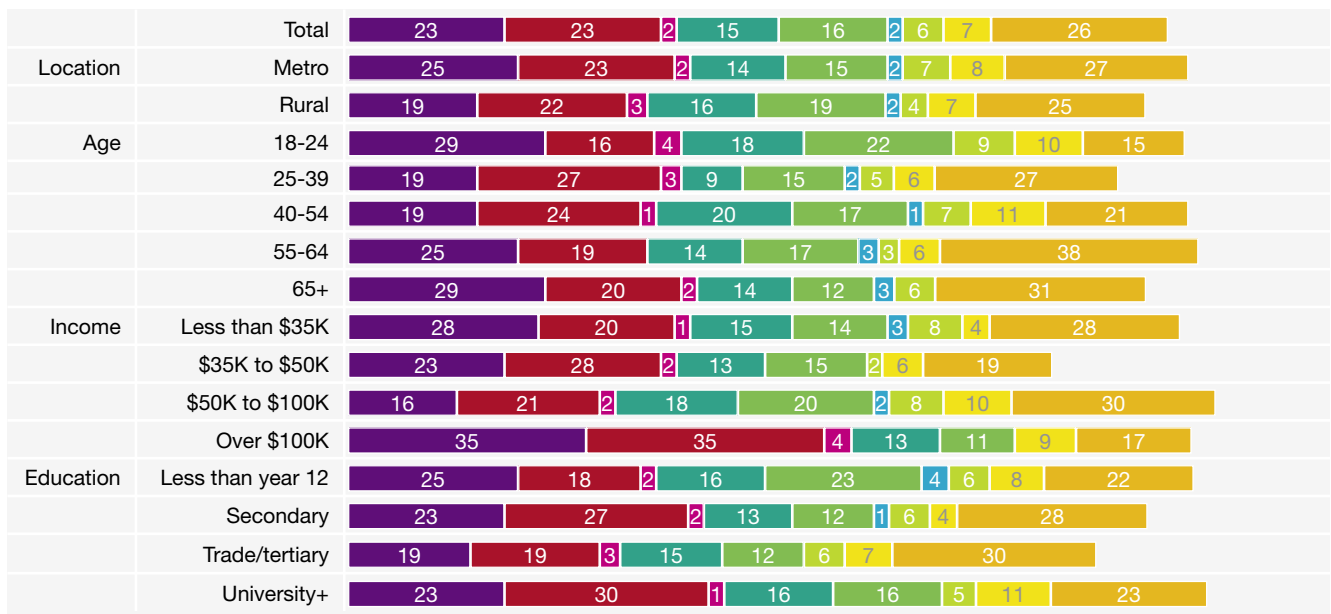
communications, personally addressed mail and unaddressed mail each account for almost a quarter of the respondents surveyed. As would be expected, around a quarter of those surveyed, supporters and non-supporters, prefer to receive 'None'.

Political parties – when not a supporter/member

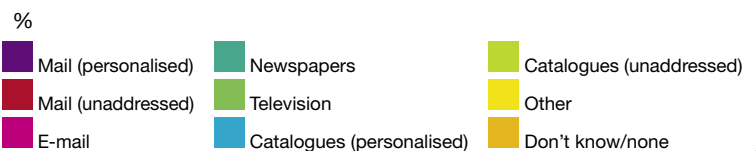


Base: Sample = 500
Fig 75: The preferred media for receiving election information from political parties when a non-supporter

By demographics

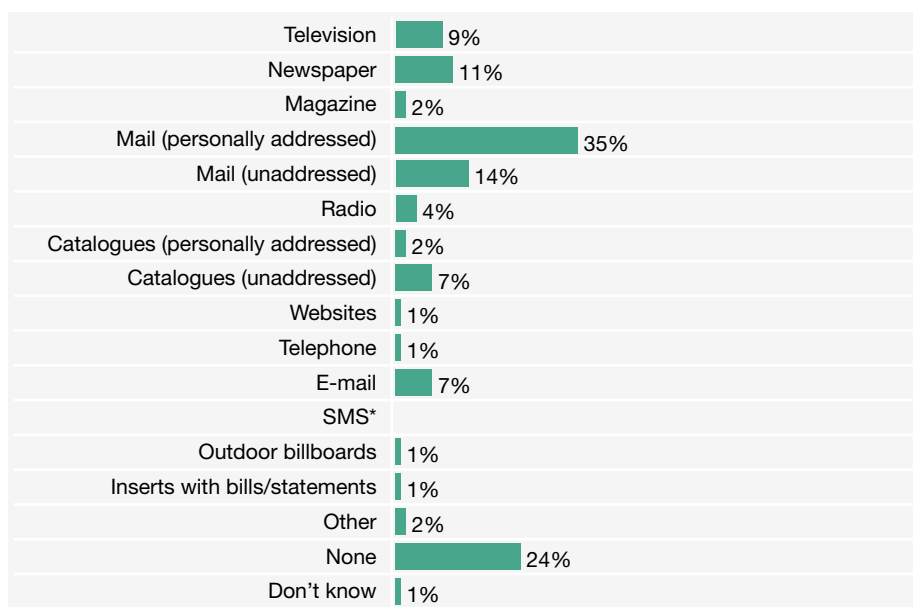


Base: Sample = 500
Fig 76: Demographics for the preferred media for receiving election information from political parties when a non-supporter



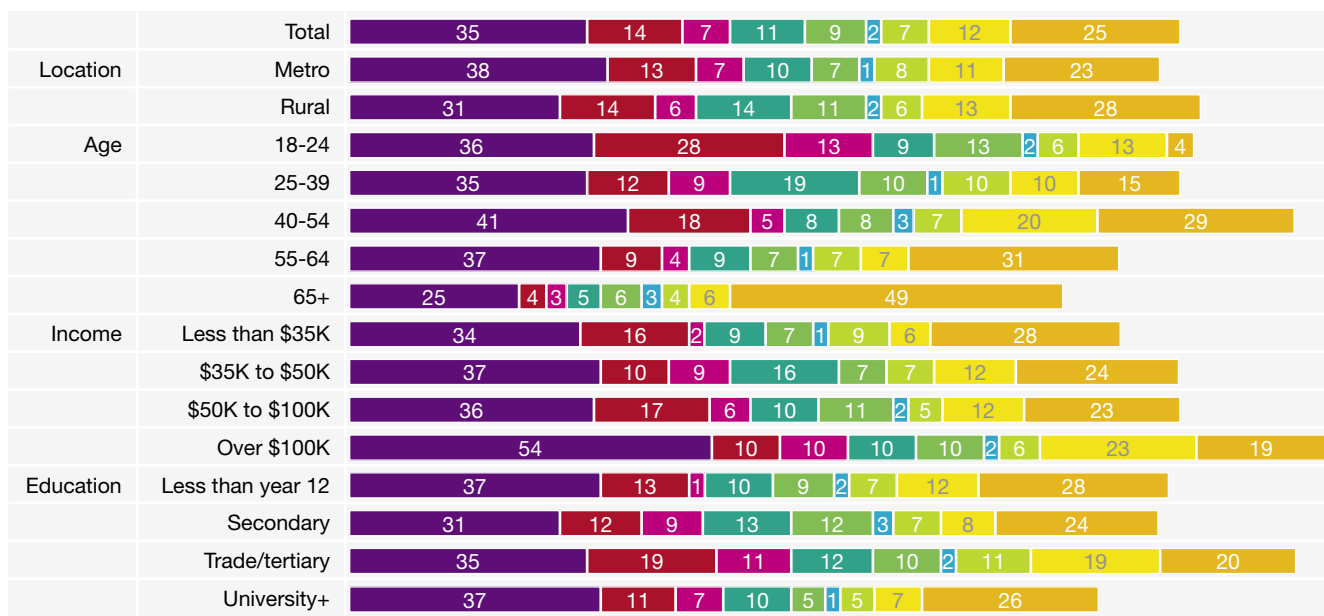
Preferred media for receiving advertising and promotional information from the not-for-profit, government and club sector – supporters and non-supporters

Clubs – when a supporter/member

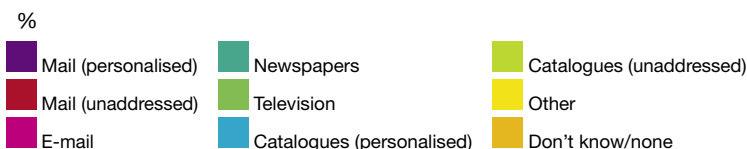


Base: Sample = 508
Fig 77: The preferred media for receiving advertising or promotional information from clubs when a member

By demographics



Base: Sample = 508
Fig 78: Demographics for the preferred media for receiving advertising or promotional information from clubs when a member



NB: Where percentages do not total 100%, some respondents provided multiple answers
* Indicates the result was less than 1%

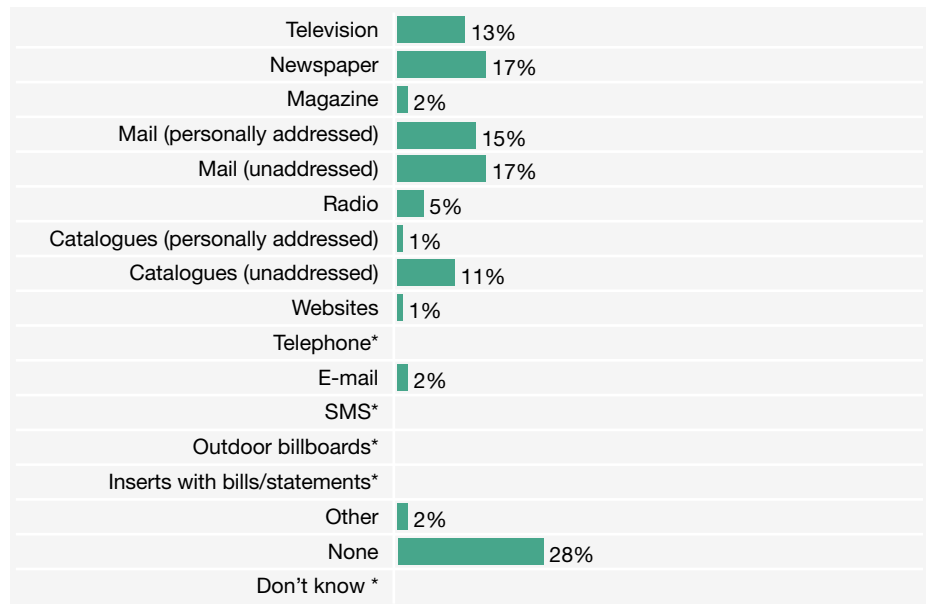


Analysis:

Without a doubt, personally addressed mail is preferred by the majority of those surveyed for receiving information if they are members of a club. The high proportion of 'None' responses could reflect that those respondents are not currently

members of a club and therefore see no need for this type of information. This is reflected by 'None' being the highest response for non-members, followed by personally addressed mail and newspaper which are equally preferred.

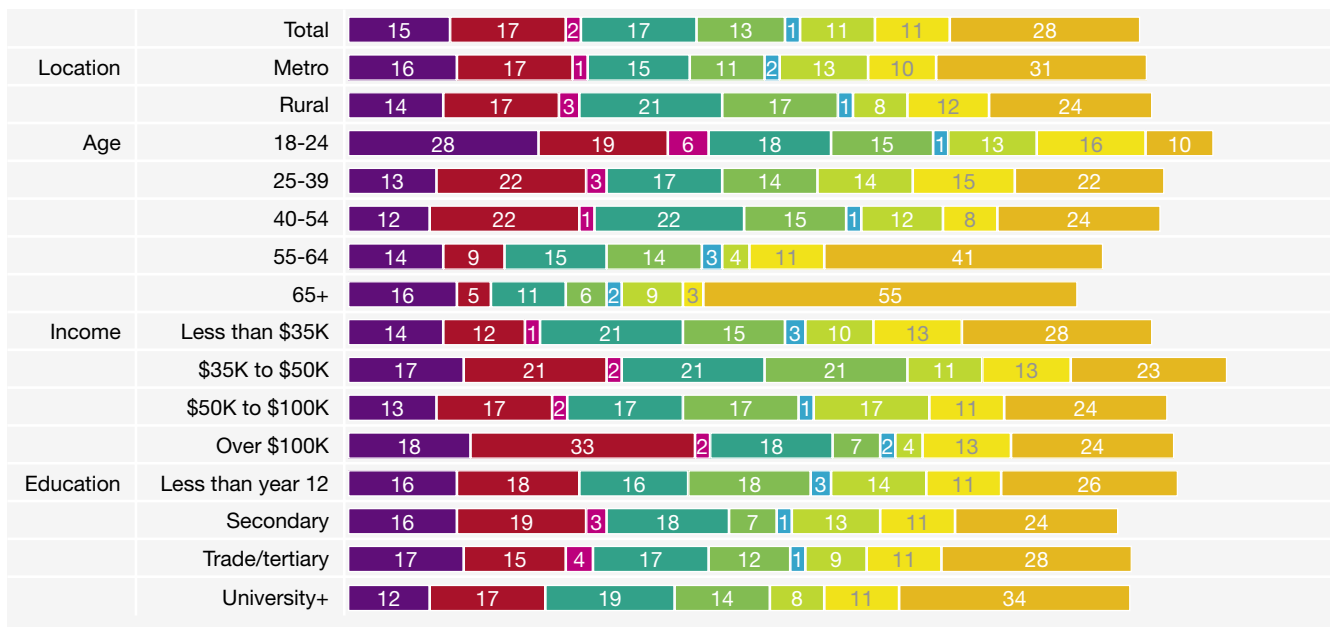
Clubs – when not a supporter/member



Base: Sample = 500

Fig 79: The preferred media for receiving advertising or promotional information from clubs when a non-member

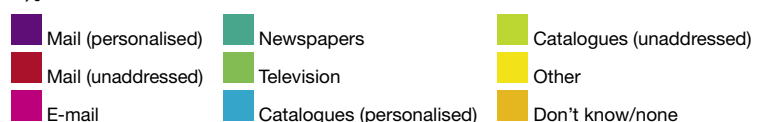
By demographics



Base: Sample = 500

Fig 80: Demographics for the preferred media for receiving advertising or promotional information from clubs when a non-member

%



Consumer perceptions of direct mail

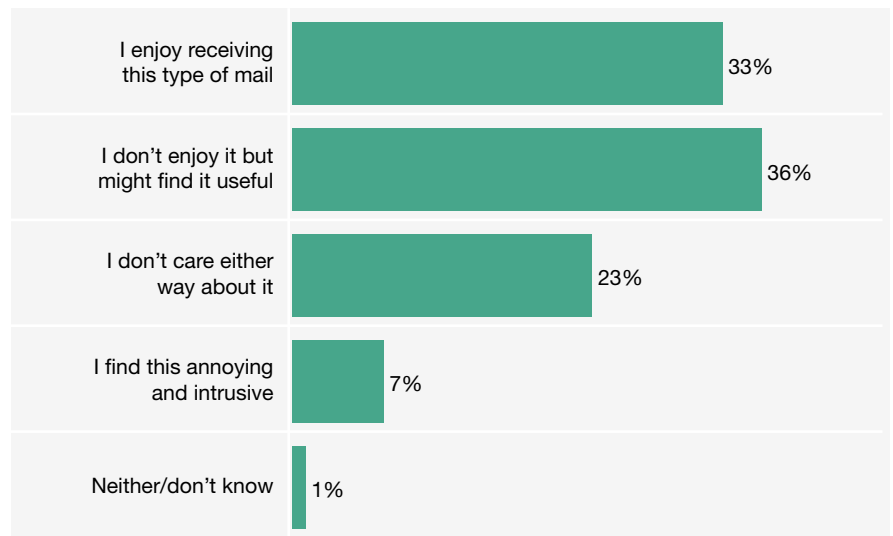
Given the competitiveness of the market place and that we are operating in a consumer-centric environment, keeping existing customers happy is of paramount importance.

For this reason, the survey's aim was to ascertain if consumers like to receive personally addressed mail. Here are the findings.

Customer attitudes towards personally addressed mail

Analysis:

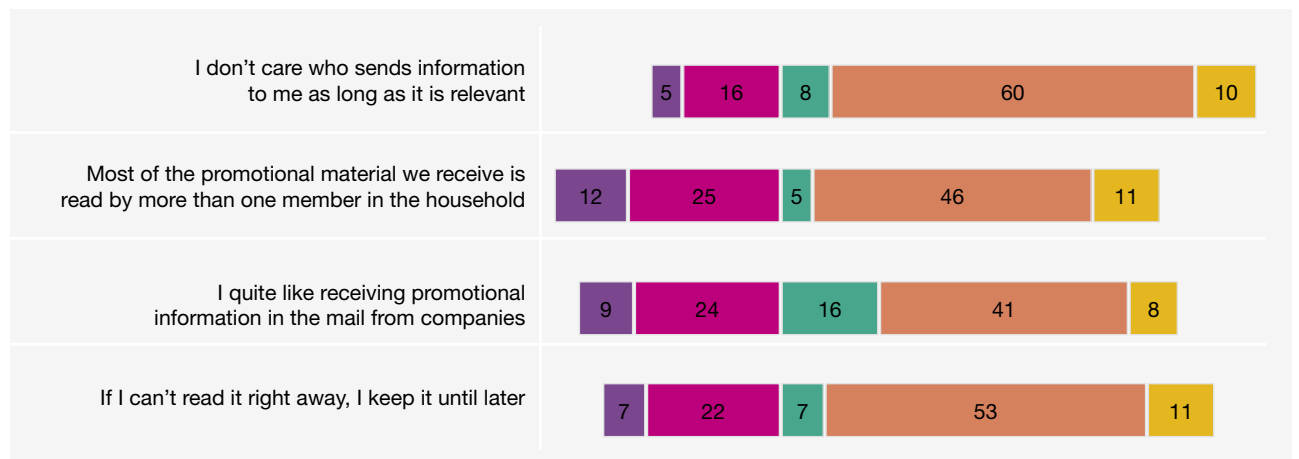
A third of customers enjoy receiving personally addressed mail and over a third find it useful. It is worth noting that only 7% find personally addressed mail annoying and intrusive.



Base: Sample = 1,001

Fig 81: Consumer attitudes to personally addressed mail when a customer

Consumer attitudes to mail they receive



Base: Sample = 1,001

Fig 82: Consumer attitude to mail they receive

Analysis:

Consumers value personally addressed communications as long as they are well targeted. Clearly this finding resonates throughout this report. It's also important to note: 57% state that most promotional mail is read by more than one member of the household.

%

Strongly disagree

Disagree

Neither agree or disagree

Agree

Strongly agree

NB: Where percentages do not total 100%, some respondents provided multiple answers

Appendix:

Sample profile

In order to be able to cross-tabulate all research findings against a wide range of demographic and geographic characteristics, TNS Australia gathered all the appropriate information from the research respondents.

The sample was selected in order to be broadly representative of the Australian population, thereby avoiding any skew that could provide misleading conclusions.

For every respondent, the following information was collected:

- Household structure (the combination of adults and children)
- Number of persons in the household
- Employment status of adults in the household
- Household income
- Current occupation of the main income earner in the household
- Gender and age of respondents
- Whether the household is rural or metropolitan based
- State in which the household resides
- Person in the household who collects the mail most often



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