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BEFORE THE
POSTAL REGULATORY COMMISSION
WASHINGTON, D.C. 20268-0001

SIX-DAY TO FIVE-DAY CARRIER DELIVERY
AND RELATED SERVICE CHANGES, 2010

Docket No. N2010-1

**DIRECT TESTIMONY OF
REBECCA ELMORE-YALCH
ON BEHALF OF
UNITED STATES POSTAL SERVICE**

1. Table of Contents

1.1 Contents

1.	Table of Contents.....	i
1.1	Contents	i
1.2	List of Figures	iv
2.	Autobiographical Sketch	v
3.	Five-Day Delivery Research Overview.....	1
4.	Definition of Terms.....	2
5.	Qualitative Research.....	3
5.1	Overview.....	3
5.2	Focus Group Methodology	4
5.3	In-Depth Interview Methodology.....	11
6.	Quantitative Research.....	12
6.1	Overview	12
6.2	Business Survey Methodology	13
6.2.1	Business Survey Questionnaire	13
6.2.2	National Accounts Sampling	15
6.2.3	Premier Accounts Sampling.....	16
6.2.4	Preferred Accounts Sampling.....	19
6.2.5	Small Business Sampling.....	21
6.2.6	Data Cleaning	23
6.3	Consumer Survey Methodology.....	25
6.3.1	Consumer Questionnaire	25
6.3.2	Consumer Sampling.....	26

6.3.3 Weighting	28
6.3.4 Data Cleaning	28
6.4 Volume Forecast Calculations	29
6.4.1 Business Forecast Calculations	29
6.4.2 Consumer Forecast Calculations	35
Appendix A: Focus Group Screeners	37
Part 1: Business Focus Groups Screeners	37
Original Business Screener – Used in Chicago and Seattle	37
Updated Screener – Used in New York and Atlanta Shippers	43
Updated Screener New York and Atlanta – Standard Mail Services	48
Part 2: Consumer Focus Groups Screener	52
Appendix B: Focus Group Participant Profiles	57
Part 1: Business Focus Groups Participant Profiles	57
Chicago, First Class Mail (Originally Recruited as Standard Mail)	57
Chicago, Primarily (75% or More) Ship Postal Service	58
Seattle, First Class Mail (Originally Recruited as Standard Mail)	59
Seattle, Primarily (75% or More) Ship Postal Service	59
New York, Shipping Use FedEx and/or UPS and Postal Service	60
New York, Suburban Business, Standard Mail	61
Atlanta Shipping Use FedEx and/or UPS and Postal Service	62
Atlanta Standard Mail	63
Part 2: Consumer Focus Groups Participant Profiles	64
Chicago, Low Income Center City	64
Chicago, Moderate Income Suburban	65
Seattle, High Income Center City	66
Seattle, Moderate Income Rural	67

Seattle, High Income Suburban	68
New York, High Income Center City.....	69
New York, High Income Suburban	70
New York, Moderate Income Suburban	71
Atlanta, Center City Low Income.....	71
Atlanta, Moderate Income Rural.....	72
Appendix C: Moderator’s Guides	73
Part 1: Business Groups Moderator’s Guide	73
Part 2: Consumer Groups Moderator’s Guide	78
Appendix D: Written Documents Used in Focus Groups.....	83
Part 1: Description of Five-Day Delivery Concept.....	83
Part 2: Written Exercise – Scale and Final Wrap-Up	83
Part 3: Communications Message Points	84
Appendix D: IDI Interview Guide	85
Appendix E: Business Segments Questionnaires	90
Part 1: National Accounts	90
Part 2: Preferred Accounts	109
Part 3: Premier Accounts.....	128
Part 4: Small Business.....	147
Appendix F: Consumer Questionnaire	166
Appendix G: CARAVAN® Sampling and Weighting Methodologies.....	185

1.2 List of Figures

Figure 1: Consumer Focus Group Composition	4
Figure 2: Small Business Focus Group Composition	5
Figure 3: Number of In-Depth Interviews by Account Type and Mailing / Shipping Purpose.....	11
Figure 4: Number of National Accounts Using and Providing Data on Products	16
Figure 5: Premier Accounts First-Stage Weighting.....	18
Figure 6: Example of Second-Stage Weighting Formula – Premier Accounts	19
Figure 7: Preferred Accounts First-Stage Weighting	20
Figure 8: Example of Second-Stage Weighting Formula – Preferred Accounts	20
Figure 9: Small Business Sample	22
Figure 10: Sample Sizes and Number of Products Included in Forecasts Following Data Cleaning Process	24
Figure 11: Consumer Sample	28
Figure 11: Example of Volume Calculation by Product for Business Segments.....	29
Figure 12: Example of Calculating Volume Change in Business Segments.....	30
Figure 13: National Accounts Volume Forecasts	31
Figure 14: Premier Accounts Volume Forecasts	32
Figure 15: Preferred Accounts Volume Forecasts.....	33
Figure 16: Small Business Volume Forecasts.....	34
Figure 17: Calculation of Adjusted Volume for Consumers	35
Figure 18: Consumer Forecasts.....	36

DIRECT TESTIMONY OF
REBECCA ELMORE-YALCH

2. Autobiographical Sketch

I am Rebecca P. Elmore-Yalch, a Senior Vice President at Opinion Research Corporation (ORC). Founded in 1938, ORC is one of the oldest and most respected full-service custom marketing research firms in the United States. As a Senior Vice President at ORC, my primary responsibilities are the management and oversight of the Public Services vertical. The Public Services vertical includes work for local, regional, state, and federal governmental and quasi-governmental agencies.

ORC has direct experience working with the Postal Service for more than 35 years. Examples of recent studies (past 10 years) include:

- Mystery Caller Research (1998 to 2008): The objective was to measure the proficiency of the employees who work in the mailing requirements and business mail entry units through responses provided to 32,000 incoming telephone calls per annum. Respondent groups included Mail Clerks / Technicians, Mailing Requirements Clerks/Mail Acceptance Specialists, Bulk Mail Supervisors, and Mail Piece Design Analysts (MDAs).
- Container and Bundle Tracking (2003): Bundle tracking was a capability under development by the Postal Service to enable mailer tracking of containers and bundles. The term *bundle* refers to carrier-route sorted flats (Standard Mail and Periodicals Mail) in the form of bundles, either strapped or wrapped. The bundle tracking service would be offered to mailers as a service for a fee. The service would expand the universe of traceable mail to carrier-route bundles whose mail pieces typically bypass mail-processing equipment. The data generated by the bundle tracking service would help customers monitor mailings and manage mail-related business activities more efficiently. The primary goal of this research was to obtain the data needed to develop revenue and cost information in the event of a rate filing. In particular, the Postal Service was interested in estimating the volume of enhanced carrier-route flats that mailers would switch to

take advantage of this service. Also of interest was an understanding of how mailers use frequency and drop-shipment methods and how they would like to receive tracking information. Quantitative telephone interviews were conducted.

- Post Office Box Customers (2006): Quantitative research was conducted among business and residential PO Box customers to identify the popularity of additional services then being considered, including online payment; holding of packages from FedEx, DHL, and other carriers; e-mail notification of mail arrival; and the establishment of business centers at Post Offices that would include a broad range of services including fax / copy / print services.
- Electronic Signatures (2006): The objective of this project was to determine the usability of electronic signatures, given their limited readability and scanning-induced defects. This was a web study among customers whose employers send mail and packages that require signature confirmation of delivery. There was also an in-depth interview (IDI) follow-up among those who agreed to be contacted.
- Monopoly Relaxation Forecast (2008): This project estimated the potential impact of relaxing the postal monopoly in the United States on usage of Standard Mail and First-Class Mail under various competitive scenarios. Quantitative surveys were conducted among four customer segments.
- Five-Day Delivery (2009): Quantitative research was conducted to assist in developing forecasts of how the proposed changes would impact the volume for the following Postal Service products: Single Piece First-Class Mail, Presort First-Class Mail, Regular Standard Mail, Nonprofit Standard Mail, Priority Mail, Express Mail, Regular Periodicals Mail, and Nonprofit Periodicals Mail. Qualitative research consisted of 10 focus groups with consumers, 8 focus groups with small businesses, and 30 IDIs with National and Preferred account customers to develop a deep understanding of how consumers and businesses would respond to five-day delivery.

In addition to these studies, the Postal Service has frequently used ORC's CARAVAN[®] telephone omnibus survey program.

Rebecca Elmore-Yalch has been with ORC since its 2007 acquisition of Northwest Research Group, which she founded in 1985. Rebecca brings more than 25 years of marketing research and strategic planning expertise to her role as Senior Vice President with oversight of ORC's Seattle office and its Public Services vertical. Rebecca has extensive expertise in public policy research and has worked with public agencies in transportation, public health, municipal and state governments, and public and investor-owned utilities. Rebecca has worked on the design and implementation of large-scale research projects for the following representative clients and government agencies:

- Caltrans
- Chicago Transit Authority
- Federal Highway Administration
- Idaho Department of Health and Welfare
- King County Metro
- Oregon Progress Board
- State of Nevada
- Transportation Research Board
- Washington State Transportation Commission

Rebecca holds a BA in Journalism and Mass Communications with a concentration in advertising management from the University of Minnesota, and an MBA with an emphasis in marketing and statistics from the University of Washington. Rebecca also holds a Professional Researcher Certification (PRC) Expert Level Certification from the Marketing Research Association. She lectured in marketing research and advertising management at the University of Washington and Northwestern University before starting a marketing research consulting firm which grew to be one of the 10 largest independent research firms in the Pacific Northwest prior to being acquired by infogroup. (ORC is part of the infogroup family of companies (infogroup / ORC)). In

addition to her work experience, Rebecca is active in a variety of organizations including the American Public Transportation Association (APTA), in which she is a member of the Marketing and Communications Subcommittee; the Transportation Research Board; and the Transportation, Infrastructure, and Logistics Committee of the U.S. Chamber of Commerce. Immediately prior to her company being acquired, Rebecca was honored to receive the Women's Business Award from the National Association of Women's Business in the State of Idaho.

PURPOSE AND SCOPE OF TESTIMONY

Five-Day Delivery

3. Five-Day Delivery Research Overview

The Postal Service currently delivers mail six days per week (Monday through Saturday). Faced with significant budget pressures from decreases in volume and revenue attributable to increasing online transactions and the current economic climate, coupled with a legal requirement to prepay over \$5 billion per year in retiree health benefits, the Postal Service is facing a massive deficit of \$7 billion this year. Similar deficits are forecasted for future years.

The Postal Service has proposed reducing the delivery of mail from the current six days per week to five days per week as a way of reducing costs. Specific elements of this plan include:

Discontinuation of the following services on Saturdays:

- Processing and transportation of originating mail
- Delivery of mail (other than Express Mail) to street addresses
- Pickups from collection boxes
- Acceptance of bulk mail

The following service components would not change:

- Post offices would remain open on Saturdays
- Delivery of mail to post office boxes on Saturdays
- Pickup of mail at Postal Service facilities by large remittance processors with post office boxes on Saturdays

- Delivery and collection of Express Mail seven days per week

ORC was commissioned by the Postal Service to conduct market research to determine how the proposed change would impact consumers and businesses. Two parallel phases of research were conducted. The methodologies for each are presented in detail below.

4. Definition of Terms

Two terms are used throughout the research and testimony. They defined as follows:

- **Applications:** The content of a mailing / shipment or its purpose. Applications include:
 - Bills, invoices, or statements
 - Payments
 - Advertising or marketing materials including flyers, circulars, catalogs, etc.
 - General communications including customer notifications, holiday cards, investor / shareholder mailings, etc.
 - Periodicals or newspapers
 - Packages
 - Newsletters
 - Other applications identified by a respondent
- **Products:** Defined as the Postal Service products used to mail or ship an application. Postal Service products include:
 - First-Class Mail (Single Piece, Presort)
 - Standard Mail (Regular, Nonprofit)
 - Priority Mail
 - Express Mail
 - Parcel Select
 - Parcel Post

- Periodicals Mail (Regular, Nonprofit)

5. Qualitative Research

5.1 Overview

The Postal Service initiated qualitative market research to evaluate how the proposed five-day delivery would impact consumers and businesses. Qualitative research is effective in drawing out participants' attitudes, feelings, beliefs, experiences, and reactions in a way which is not feasible using other methods.

The specific objectives of this phase of the research were to:

- Improve understanding of the various ways consumers and businesses would respond to five-day delivery (e.g., changes in mailing patterns, switching to competitors, increased use of online billing / payment, etc.).
- Understand why businesses and consumers would respond as they do.
- Assess how consumers, small businesses, and large companies or high volume mail processors would adjust their operations to accommodate five-day delivery.
- Assess how difficult business and consumer adjustments would be and why. Improve understanding of the challenges they would face.
- Assess perceptions of Postal Service reasons for five-day delivery.
- Assess how USPS could mitigate the impact of five-day delivery on consumers and how to communicate the changes to them effectively.
- Test the clarity and effectiveness of a prepared summary of changes that would flow from five-day delivery for ultimate inclusion in the quantitative survey instruments.

The qualitative research had three components:

- Focus groups with consumers
- Focus groups with small businesses
- IDIs with National and Premier Accounts

5.2 Focus Group Methodology

Eighteen focus groups were conducted between September 1, 2009 and September 24, 2009 in four major metropolitan areas: Chicago, IL; Seattle, WA; New York, NY; and Atlanta, GA. Ten of these groups were conducted with consumers and eight were conducted with small business owners and managers. Consumer groups were segmented based on location and income as follows:

Figure 1: Consumer Focus Group Composition

Metro Market	Location Type	Income
Chicago	Center City	Low Income (household income \$30,000 or less)
Chicago	Suburban	Moderate Income (household income \$30,000 to \$100,000)
Seattle	Center City	High Income (household income greater than \$100,000)
Seattle	Suburban	High Income (household income greater than \$100,000)
Seattle	Rural	Moderate Income (household income \$30,000 to \$100,000)
New York	Center City	High Income (household income greater than \$100,000)
New York	Suburban	High Income (household income greater than \$100,000)
New York	Suburban	Moderate Income (household income \$30,000 to \$100,000)
Atlanta	Center City	Low Income (household income \$30,000 or less)
Atlanta	Rural	Moderate Income (household income \$30,000 to \$100,000)

Potential participants were screened to ensure that each was the person in the household considered to be the “CEO of the mail” – that is, the person primarily responsible for handling the receipt, sorting, and other tasks related to the household’s mail. Within each group, a demographic mix of participants (by age, gender, and

employment status) was represented. In addition, participants used a variety of mailing and shipping services. Individuals who worked in or who had a member of their household working in several specific industries were excluded: advertising and public relations; market research; and mailing or shipping (USPS, UPS, FedEx, and mail or small package delivery services).

The business focus groups represented small businesses, defined as those having fewer than 100 employees. Each individual recruit had to be primarily responsible for the tasks related to that business's mail and shipping requirements. Within the groups, a mix of different types of businesses was represented. As with the consumer groups, businesses in the following business sectors or companies were excluded: advertising or public relations, market research, and mailing or shipping services (specifically USPS, UPS, FedEx, and other mail or small package delivery services). The business groups were segmented based on types of mailing and shipping services used, as described in Figure 2. Note that the schedule was modified slightly following the groups in Chicago and Seattle as the business groups meant to represent those using Standard Mail services were not as heavy users of Standard Mail as desired. Therefore, the New York and Atlanta screeners were modified so that one group in each of these markets represented users of Standard Mail. In addition, these groups were screened so that retailers and e-tailers were heavily represented.

Figure 2: Small Business Focus Group Composition

Metro Market	Mailing / Shipping Service(s) Used – Original Schedule	Mailing / Shipping Service(s) Used – Final Schedule
Chicago	Primarily ship via USPS (75% or more)	Primarily ship via USPS (75% or more)
Chicago	Use Standard Mail services	Use First-Class Mail services
Seattle	Primarily ship via USPS (75% or more)	Primarily ship via USPS (75% or more)
Seattle	Use Standard Mail services	Use First-Class Mail services
New York	Ship via FedEx or UPS and USPS	Ship via FedEx or UPS and USPS
New York	Use First-Class Mail services	Use Standard Mail services

Metro Market	Mailing / Shipping Service(s) Used – Original Schedule	Mailing / Shipping Service(s) Used – Final Schedule
		Primarily retailers or e-tailers
Atlanta	Ship via FedEx or UPS and USPS	Ship via FedEx or UPS and USPS
Atlanta	Use First-Class Mail services	Use Standard Mail services Primarily retailers or e-tailers

Screeners used for recruiting the business focus groups are included in Appendix A, Part 1. In addition, a description of participants in each business group is included in Appendix B, Part 1, although names and other identifying information are excluded.

Each group's moderator used a guide to direct and focus discussion that specified coverage of:

- General introductions
- Current mailing and shipping behaviors, including use of Postal Service services
- General attitudes toward the Postal Service
- Participant-recommended strategies for dealing with the current deficit situation
- Reactions to commencement of five-day delivery
- Reactions to strategies that mitigate impacts and make communication about five-day delivery effective

The moderators' guides for the business groups are included in Appendix C, Part 1. The guides were meant to provide a general structure for directing the flow of the conversation during the group session. Questions were generally open-ended in format and were designed to elicit in-depth responses as opposed to simple yes or no answers. Questions were also carefully worded so as to not prompt a particular response. The time spent on each topic area and question varied by group and was largely guided by the group discussion. In addition, the flow of the questions varied by group. The moderators used significant discretion in asking the questions and guiding

the conversation to encourage an open and in-depth discussion. For three of the six topic areas, specific verbiage (oral and written) was used in the sessions.

To initiate discussion regarding the fourth bullet (participant-recommended strategies for dealing with the current deficit situation), the moderator read the following summary statement:

The situation today: As a result of the current recession, huge volume and revenue declines, and a legal requirement to annually prepay over \$5 billion in retiree health benefits, the Postal Service is facing a massive deficit of \$7 billion this year. And, it will face a similar deficit next year.

Participants were then asked to suggest possible solutions.

To gauge reactions to the fifth bullet (move to five-day delivery), participants were first asked for their immediate reactions to the proposal without going into specific details.

They were told:

Federal law has required that mail be picked up and delivered six days a week since 1983. The Postal Service has asked Congress earlier this year to approve a reduction in service to five days a week.

They were then asked to provide their immediate responses.

After providing their initial reactions to the overall proposal of moving to a five-day delivery schedule, participants were asked to read a one-page document that outlined six specific aspects of the proposed five-day delivery. This document was developed for use following the first two consumer groups in Chicago and was based in part on questions that arose in those groups, as well as on a working document that was developed by Postal Service staff. This document was modified slightly through subsequent groups. The final document is included in Appendix D, Part 1. Participants were given the opportunity to read through the document. It was also read to them by the moderator. They were then asked to discuss what specific concerns they might

have or whether certain parts of the proposal had greater import. The six items contained in the document included:

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday through Friday only.
- Mail will continue to be delivered to PO Boxes Monday through Saturday.
- Post Offices currently open on Saturday will remain open.
- No mail will be collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last scheduled Friday pickup time will be collected and processed on Monday.
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
- Express Mail will continue to be delivered seven days p[er week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no pickup of Express or Priority Mail on Saturday.

Following this discussion, participants were asked to complete a written exercise in which they indicated on a scale the extent to which they would strongly choose five-day delivery or strongly choose a 10 percent across-the-board increase in postage and shipping rates. After completing the written exercise, every participant was asked to provide their response and their reasons for that choice. The scale used in the written exercise is shown below:

If these were the only two options to reduce the deficit the USPS is facing which would you choose?											
Strongly Choose 5-Day Week Service Delivery										Strongly Choose 10 Percent Across- The-Board Rate Increase	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



To address a portion of the sixth bullet point (reactions to strategies that make communication about five-day delivery effective) and based on comments from participants in the three groups conducted in Chicago, a second written document was developed that outlined some possible message points. Following are the key points

contained in this document that was shown to participants in 15 of the 18 group sessions. A copy of the actual written document distributed in the groups is contained in Appendix D, Part 3.

- The economic situation and the increased use of the Internet have severely impacted Postal Service revenues. We expect in 2009 a decrease of over 25 billion pieces of mail annually, which is a 13 percent decline compared to 2008. Revenue has declined by about \$9 billion in 2009 versus 2008.
- Since 1999, our costs have increased because the number of addresses served has grown from 134 million to 150 million.
- We have reduced our workforce 20 percent since 1999, eliminating 150,000 jobs in the last three years alone. Management pay has been capped. In 2009, we will reduce costs by \$5.9 billion, which is about 8 percent of total costs of about \$70 billion.
- We have implemented a growth strategy based on pricing and product innovation to offer even more value to customers. This includes pricing incentives for package shippers who pay online. We have made it more convenient for our retail customers, deploying over 2,500 automated postal centers in Post Offices.
- Nevertheless, the Postal Service faces a deficit of over \$7 billion. The deficit will be reduced in part by eliminating Saturday delivery, which will save over \$3.3 billion annually.
- The rest of the deficit will be eliminated by restructuring payment of about \$5.6 billion annually for prepayment of future retiree health benefits that are now required by law.
- All other current service performance levels will be maintained, if not improved.

As they read the document, participants were asked to circle key words and phrases that resonated with them and were most effective in communicating the reason for five-day delivery. Discussion then followed.

As a wrap-up at the end of the groups, participants were instructed to write a letter regarding their feelings toward five-day delivery to someone in the government or at the Postal Service. They addressed the letter to someone and then wrote their message (copy of written exercise document included Appendix D, Part 2.

5.3 In-Depth Interview Methodology

Thirty IDIs were conducted with individuals at selected National and Premier Accounts identified as having the primary responsibility for defined aspects of mailing or shipping within a company. A matrix of completed interviews for each purpose and account type appears below.

Figure 3: Number of In-Depth Interviews by Account Type and Mailing / Shipping Purpose

Mailing / Shipping Purpose	National	Premier	Total
Direct Marketing	3	2	5
Billing	3	2	5
Remittance / Payments	3	2	5
Shipping / Distribution	3	2	5
Publishing – Periodicals	2	1	3
Publishing – Catalogs	2	1	3
Publishing – Newspapers	1	1	2
Nonprofit	1	1	2
Total	18	12	30

A partial list of National and Premier Accounts was drawn from the universe of accounts in CBCIS as of August 17, 2009 for use in this phase of the qualitative research. This same universe was used for drawing the sample in the quantitative research. Those interviewed in the IDIs were excluded from the quantitative research sample frame. An executive interviewer made an initial call to identify the person at the account with the primary responsibility for mailing and shipping within a specific purpose, and to schedule an appointment for completing the interview.

The in-depth interviews were completed by telephone by a Senior Project Manager at ORC. This individual attended the focus groups in Seattle to gain an understanding of the research and the issues to be addressed. As with the focus groups, an interview guide was developed to direct the flow of the conversation. A copy of the interview guide is included in Appendix E.

6. Quantitative Research

6.1 Overview

The quantitative phase was designed to assist development of forecasts for the potential impact resulting from five-day delivery on volume for the following products: Single Piece First-Class Mail, Presort First-Class Mail, Standard Regular Mail, Nonprofit Standard Mail, Priority Mail, Express Mail, Periodicals Mail, and Nonprofit Periodicals Mail. Estimates were not developed for Parcel Select or Parcel Post given their small volume and the relatively few users of these products who were interviewed.

The quantitative research was designed to estimate, by segment, the percentage by which each applicable product's volume would increase or decrease if five-day delivery were implemented.

Each of the Postal Service's four business segments was surveyed:

- National Accounts
- Premier Accounts
- Preferred Accounts
- Small businesses (companies with fewer than 100 employees and not included in the other business segments)

Consumers were also surveyed.

All respondents had used the mail in the past 12 months. Respondents in each business segment were screened to ensure that they decide or influence decisions as to how mail or packages are sent. Consumer respondents were primarily responsible for handling receipt, sorting, and other tasks related to household mail.

Data collection was completed during October 2009. Incentives were offered to all respondents, excepting consumers surveyed on landline telephones, to encourage participation.

Given differences among segments, the approach for obtaining reliable, unbiased estimates differed by segment. Therefore, the data collection approach and sampling plan was optimized for each segment as explained below.

6.2 Business Survey Methodology

6.2.1 Business Survey Questionnaire

The questionnaire was similar for all business segments. A copy of the business survey questionnaire is provided in Appendix F. For each application respondents managed, we asked for:

- Past 12-month volume
 - Number of pieces by application
 - Allocation of total volume (percentage of total volume) by product
- Projected next 12-month volume
 - Number of pieces by application
 - Allocation of total volume by product
- A rating of the likelihood that five-day delivery would cause changes in mail / package volume or in how mail / packages are sent, using an 11-point scale where “0” represented “extremely unlikely” and “10” represented “extremely likely.”
- Projected volume in first 12 months after five-day delivery is implemented
 - Number of pieces by application
 - Allocation of total volume per application by product

After asking respondents for their past and projected 12-month volumes, we read a concept statement about the proposed five-day delivery schedule that was honed during the qualitative research.

Despite very aggressive cost cutting, the Postal Service is projecting financial losses for this and the next several years. This is due to a significant decline in mail volume and a major requirement to prefund its retiree's health benefits. The Postal Service is committed to fulfilling its fundamental role as a deliverer of mail and packages to all Americans. To accomplish this, the Postal Service is developing a plan to transition from six- to five-day delivery on a national basis. This will remove delivery costs and help bring the financial picture into better balance.

The key components to the five-day delivery plan are as follows:

- *No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.*
- *Mail will continue to be delivered to PO Box addresses [ADDED THE FOLLOWING FOR NATIONAL, PREMIER, AND PREFERRED ACCOUNTS: (including PO Boxes, Caller Service and National Firm Holdouts)] Monday – Saturday].*
- *[INCLUDED ONLY FOR ALL NATIONAL, PREMIER, AND PREFERRED ACCOUNTS:] Remittance mail that is picked up at a plant on Saturday or Sunday will continue to be picked up on those days.*
- *Post Offices will remain open on Saturday.*
- *No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.*

- *[INCLUDED ONLY FOR ALL NATIONAL, PREMIER, AND PREFERRED ACCOUNTS:] Bulk mail entry units will be closed on Saturday. However, Detached Mail Units currently open on Saturday or Sunday will remain open. Mail will continue to be accepted and verified at DMUs on Saturday or Sunday.*
- *[INCLUDED ONLY FOR ALL NATIONAL, PREMIER, AND PREFERRED ACCOUNTS:] Destinating entry bulk mail can continue to be drop shipped at plants on Saturday and Sunday and at delivery units on Saturday. However, time slots for dropping the mail will be shortened. Mail drop shipped at a plant on Saturday or Sunday will be processed on Monday. Standard Mail drop shipped at a delivery unit on Saturday will be delivered by Tuesday.*
- *Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.*
- *Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.*

6.2.2 National Accounts Sampling

The Postal Service provided the current (as of August 17, 2009) universe (N = 236) of National Accounts from CBCIS. Given the small number of National Accounts and their high volumes, efforts were made to maximize the number of completed surveys within this segment. Respondents were asked to provide data for all applications and products over which they had responsibility. A total of 62 interviews were completed. We used interviews completed with 59 respondents at 50 National Accounts. (Section 6.2.6 provides information on how data was reviewed and why some cases were dropped). Multiple respondents (in most cases two but in one case three individuals) were interviewed at eight of the companies.

Interviews were conducted by telephone. Respondents were first asked to identify all of the applications for which they had responsibility. Figure 4 details the number of National Accounts providing data for each product used (self-reported) in the past 12 months. Fourteen National Accounts provided data for a single product. The balance provided data for two or more products. In total, the 59 respondents provided data on 172 products.

Figure 4: Number of National Accounts Using and Providing Data on Products

Number of National Accounts Using Product	
Single Piece First-Class Mail	31
Presort First-Class Mail	28
Priority Mail	43
Express Mail	22
Regular Periodicals Mail	10
Nonprofit Periodicals Mail	2
Regular Standard Mail	13
Nonprofit Standard Mail	3
Parcel Select	5
Parcel Post	15

All National Accounts were included in the sample and we attempted to complete an interview with every account. Multiple attempts were made to schedule and complete an interview. While not all National Accounts completed a survey, there was no systematic bias in how accounts were sampled. Therefore, there was no reason to weight this data as it is assumed that by following accepted research methods to reach senior-level executives the resulting sample is representative of all National Accounts.

6.2.3 Premier Accounts Sampling

The Postal Service provided the current (as of August 17, 2009) universe of Premier Accounts from CBCIS (N = 24,754) from which to draw a sample. To ensure representation of all products in the final sample, each account was randomly assigned to represent one of the Postal Service products it uses (as indicated by the presence of past 12-month volume in the database). Each account was assigned to a stratum

corresponding to this product. This allowed ORC to target interviews so that low-incidence products were sampled sufficiently. Interviews were completed by telephone.

Given the large number of Premier Accounts, and to minimize the overall burden on a single respondent using multiple applications, ORC screened to identify the individual at the account most responsible for a specific application. For example, when targeting users of Standard Mail, we identified the person within the company most responsible for advertising or marketing materials including flyers, circulars, catalogs, and so forth. Because these are large companies, responsibility for respective applications and products was usually vested in different individuals.

Respondents were then asked to provide data for the single application they managed. Respondents allocated their volume for the specified application to all of the various products that were used for that application.

A total of 679 interviews were completed. After reviewing the data in accordance with the standards described in detail in Section 6.2.6, 630 respondents across the stratified sample provided data for a total of 948 products.

Because of the size of the total universe of Premier Accounts, data were weighted to represent volume for the entire segment. Weighting calculations required two steps. The first-stage weights were calculated by product as illustrated in Figure 5.

Figure 5: Premier Accounts First-Stage Weighting

Postal Service Product	# of Respondents Using Product	% of Total Respondents Using Product (n = 630)	Target Percent ¹	Weight ²
First-Class Mail³	328	52.06	34.56	0.664
Priority Mail	196	31.11	16.32	0.524
Express Mail	107	16.98	4.36	0.257
Regular Periodicals Mail	70	11.11	2.75	0.247
Nonprofit Periodicals Mail	26	4.13	4.34	1.051
Regular Standard Mail	86	13.65	25.34	1.856
Nonprofit Standard Mail	53	8.41	10.96	1.303
Parcel Select	9	1.43	0.45	0.315
Parcel Post	73	11.5%	0.93	0.080

¹ The target percentages reflect the relative proportion of all Premier Accounts that use each product (as indicated by past 12 month usage data in CBCIS). The overall proportion with volume for each product was determined with each proportion, then set to 100% within each product. For accounts with residual volume, we assumed that 100% use First-Class Mail and 50% use Priority Mail. Residual volume is a category of volume reported in CBCIS; the volume is not linked in a known way to one of the Postal Service products. Postal Service experts provided the assumptions that all accounts with residual volume use First-Class Mail and that half use Priority Mail.

² Weight = Target Percent / Percent Using Product (e.g., for First-Class Mail, the weight equals 34.56% / 52.06% = 0.664).

³ Includes 214 users of Single Piece First-Class Mail and 178 users of Presort First-Class Mail.

Each respondent was assigned a final (second-stage) weight equal to the sum of the weights corresponding to each of the products that his or her organization used in the past 12 months. If a respondent used a single product, the weight would be that from the first-stage weighting shown above. If a respondent's organization used multiple products – for instance, had sent First-Class Mail, Priority Mail, and Regular Standard Mail in the past 12 months – the weight assigned to the respondent would be calculated as shown in Figure 6 (using the weights for each product based on the calculations for the first stage of weighting).

Figure 6: Example of Second-Stage Weighting Formula – Premier Accounts

Product(s) Used	Weight
First-Class Mail	0.664
Priority Mail	0.524
Regular Standard Mail	1.856
Total Weight	3.044

The total weight is applied to the volume estimates given for each product the respondent provided data on their past 12-month volume, their projected next 12-month volume, and their projected 12-month volume with five-day delivery.

6.2.4 Preferred Accounts Sampling

The Postal Service provided the current (as of August 17, 2009) universe from CBCIS of Preferred Accounts (N = 3,364,503) from which to draw a sample. Sampling was done in two phases:

- We began by interviewing a random sample of 600 Preferred Accounts.
- To ensure adequate representation for users of low-incidence products (all but First-Class Mail and Priority Mail), we interviewed a supplemental sample (n = 197) of Preferred Accounts known to be users of those products (based on past 12-month volume data in CBCIS). This over-sampling ensured adequate representation for calculation of volume estimates.

Interviews were conducted by telephone. Since these are small companies, one decision maker could typically speak for all applications and products used by the company. Therefore, each respondent was asked about all applications and products used.

A total of 797 interviews were completed with Premier Accounts. After reviewing the data in accordance with the cleaning rules detailed in Section 6.2.6, a total 738 completed surveys were used in the analysis. These businesses provided data about 1,421 products. Because some products were over-represented, data are weighted

using the same procedure as that described for Premier Accounts. First-stage weights are shown in Figure 7.

Figure 7: Preferred Accounts First-Stage Weighting

Postal Service Product	# of Respondents Using Product	% of Total Respondents (n = 738)	Target Percent ¹	Weight ²
First-Class Mail³	496	67.21	51.71	0.769
Priority Mail	220	29.81	33.35	1.119
Express Mail	130	17.62	3.28	0.192
Regular Periodicals Mail	61	8.27	0.17	0.021
Nonprofit Periodicals Mail	75	10.16	0.34	0.033
Regular Standard Mail	154	20.87	6.59	0.316
Nonprofit Standard Mail	160	21.68	4.44	0.205
Parcel Select	4	0.54	0.00	0.008
Parcel Post	121	16.40	0.01	0.001

¹ The target percentages reflect the relative proportion of all Premier Accounts that use each product (as indicated by past 12 month usage data in CBCIS). The overall proportion with volume for each product was determined with each proportion, then set to 100% within each product. For accounts with residual volume, we assumed that 100% use First-Class Mail and 50% use Priority Mail. Residual volume is a category of volume reported in CBCIS; the volume is not linked in a known way to one of the Postal Service products. Postal Service experts provided the assumptions that all accounts with residual volume use First-Class Mail and that half use Priority Mail.

² Weight = Target Percent / Percent Using Product (e.g., for First-Class Mail, the weight equals 51.71% / 67.21% = 0.769).

³ Includes 455 users of Single Piece First-Class Mail and 131 users of Presort First-Class Mail.

Preferred Account respondents were assigned a final weight equal to the sum of the weights corresponding to each of the products that their respective organizations used in the past 12 months. For example, if a respondent's organization had sent First-Class Mail, Priority Mail, and Regular Standard Mail in the past 12 months, the weight assigned to the respondent would be calculated as follows (using the weights for each product based on the calculations detailed in

Figure 8).

Figure 8: Example of Second-Stage Weighting Formula – Preferred Accounts

Product(s) Used	Weight
First-Class Mail	0.769
Priority Mail	1.119
Regular Standard Mail	0.316
Total Weight	2.204

The total weight is applied to the volume estimates given for each product the respondent provided data on their past 12-month volume, their projected next 12-month volume, and their projected 12-month volume with five-day delivery.

6.2.5 Small Business Sampling

A sample of small businesses (defined as businesses with 100 or fewer employees and not in CBCIS) was surveyed online. Small businesses of this size are very difficult to reach through traditional telephone interviewing. They are often more willing to respond to an online survey that allows them to complete the survey at a time convenient to their extended work hours. Providing an online survey methodology to reach this business segment represented the most efficient and economical methodology.

Respondents were recruited from a panel provided by EMI, Inc., a leading provider of online research products and solutions. EMI is a network of panels rather than a single panel provider. Their partner panels go through a strict assessment process with each evaluated on a variety of topics such as recruitment, profiling, panel management, costs, customer service, and so forth. Panels become EMI partners only if they pass this strict vetting process. For each study, EMI selects the best panel partner to meet the specific objectives and required outcomes for a study.

To ensure that the sample for this segment did not duplicate companies in the National, Preferred, and Premier Accounts samples, questions in the survey were used to screen out the following:

- Companies that pay for postage via postage meter, permit imprint, pre-cancelled stamps, or an Express Mail corporate account

- Respondents that reported use of Standard Mail, Parcel Select, or Periodicals Mail

In addition, to minimize the likelihood of sampling a company that was also included in the CBCIS data base (i.e., were a National, Preferred, or Premier Account), respondents were asked to give their company name. In those cases where a name was duplicated (n = 47), these cases were not used.

Because of these businesses' modest size, a single decision maker in the company could typically speak for all applications and products used by the company. Therefore, each respondent was asked to provide input on all applications and products used.

A total of 1,045 interviews were completed with respondents meeting the qualifications described above. This data was reviewed in accordance with cleaning standards described in detail in the next section (6.2.6). This resulted in a total of 725 companies provided data on four products used by their companies. Data was provided for a total of 908 products.

Figure 9: Small Business Sample

Product(s) Used	Number of Respondents Who Use Product
First-Class Mail	644
Priority Mail	327
Express Mail	107
Parcel Post	157

The Postal Service has no known data source for small business volumes by product which could allow expansion of this data to known sources. At the same time, there was no systematic bias in how small businesses were sampled. Therefore, we assumed that there was no inherent bias in the estimates provided by sampled businesses from the universe of small businesses.

6.2.6 Data Cleaning

In accordance with standard marketing research practices, respondents were removed from the dataset if their responses were incomplete or clearly illogical or inconsistent.

Data cleaning followed these steps:

- Removal of any respondent unable to provide responses to key volumetric questions. A total of 18 respondents from the four business samples were dropped: none from National Accounts, five from Premier Accounts, four from Preferred Accounts, and nine from the small business sample.
- National and Premier Account data for the total number of packages and mail shipped in the past 12 months were reviewed. Because these are large-volume accounts, any respondent who reported having shipped less than 100 packages or pieces of mail in the past 12 months was dropped. One National Account and 10 Premier Accounts were dropped from the dataset for this reason.
- Data for Preferred Accounts were also reviewed. Any respondent reporting zero volume (i.e., no mail or shipments) was dropped. Three Preferred Accounts were dropped from the dataset as a result of this review. In addition, one Preferred Account was dropped because they reported an increase in volume from 50,000 before five-day delivery and 10,000,000 after the introduction of five-day delivery.
- Finally, data from the small business respondents were reviewed. Because of the relatively small size of these companies, any respondent reporting mail and package volume in excess of 100,000 for any of three time periods (last 12 months, next 12 months, or first 12 months after implementation of five-day delivery) was dropped. Seventeen respondents were dropped as a result of this review. Forty-seven cases were dropped as they were identified by company name (provided by respondent) as being a Preferred Account in the CBCIS file. In addition, 108 small business respondents reported volume for Regular Standard Mail, Nonprofit Standard Mail, Regular Periodical Mail, Nonprofit

Regular Mail, or Parcel Select. Use of these products would indicate that they were Preferred Accounts.

A final review of the business data was conducted to identify any additional respondents for which the relative magnitude of their total reported volume across the various time periods clearly did not make sense. Two hundred twenty-four instances were identified in which respondents indicated a change of greater than 25 percent in total volume between the next 12 months (before being exposed to five-day delivery) and the first 12 months after implementation. ORC established this rule in consultation with Postal Service experts who agreed that such large-magnitude changes were inconsistent with historical records of mailer responses to any large-magnitude triggers experienced in recent decades. Figure 10 provides details regarding the total number of interviews initially completed within each segment and the number of interviews used for the final forecasts. In addition, the figure provides the final number of products included in the forecasts by segment.

Figure 10: Sample Sizes and Number of Products Included in Forecasts Following Data Cleaning Process

Business Segment	Number of Interviews Completed	Number of Interviews Included in Forecasts After Cleaning	Number of Products Included in the Forecasts
National Accounts	62	59	172
Premier Accounts	679	630	948
Preferred Accounts	797	738	1,421
Small Businesses	1,045	725	1,235
Total	2,538	2,152	3,776

6.3 Consumer Survey Methodology

6.3.1 Consumer Questionnaire

Respondents were initially screened to ensure that they were the individuals in their households with primary responsibility for handling the receipt, sorting, and other management of household mail. Qualified respondents were then asked to identify the applications used for personal purposes over the past 12 months. Consumer applications were limited and included payments, correspondence, documents, and packages.

Then, for each application used, respondents were asked to provide an estimate of their past 12-month volume by application and, for each application, to allocate that volume to the four primary products consumers are likely to use: First-Class Mail, Priority Mail, Express Mail, and Parcel Post.

They were then read the following description of the proposed five-day delivery. As with the description read for the business groups, this description was developed based on input from experts within the Postal Service and insights from the qualitative research to improve the clarity of the stated proposal.

Despite very aggressive cost cutting, the Postal Service is projecting financial losses for this and the next several years. This is due to a significant decline in mail volume and a major requirement to prefund its retiree's health benefits. The Postal Service is committed to fulfilling its fundamental role as a deliverer of mail and packages to all Americans. To accomplish this, the Postal Service is developing a plan to transition from six- to five-day delivery on a national basis. This will remove delivery costs and help bring the financial picture into better balance.

The key components to the five-day plan are as follows:

- *No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.*

- *Mail will continue to be delivered to PO Box addresses.*
- *Post Offices will remain open on Saturday.*
- *No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.*
- *Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.*
- *Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.*

For each application used, respondents were then asked to indicate the likelihood they would have changed how each application was sent if five-day delivery had been in place for the past 12 months, using an 11-point scale where “0” represented “extremely unlikely” and “10” represented “extremely likely.” For each application a respondent gave a value of 1 or greater, they were then asked how the past 12-month volume for that application would have been sent, allocated by product, if five-day delivery had been in place a year ago.

A copy of the consumer questionnaire is included in Appendix F.

6.3.2 Consumer Sampling

Consumers were interviewed by telephone using ORC’s CARAVAN[®] program. The Postal Service regularly uses ORC’s CARAVAN[®] program and its use is supported by rebuttal testimony from Timothy D. Ellard before the Postal Rate Commission in 1997 (Docket No. 97-1).

CARAVAN[®]'s Telephone Omnibus is a multi-client national telephone study conducted twice each week among a random sample of 1,000 adults. CARAVAN[®] has been used extensively by the Postal Service since 2004 and has been documented as being a reliable and efficient methodology to reach consumer households. In the past two years, the CARAVAN[®] Telephone Omnibus methodology has been updated to address concerns with coverage resulting from the increase in cell phone-exclusive households.

Each of CARAVAN[®]'s two weekly samples is comprised of 1,000 adults 18 years of age and older living in private households in the continental United States. Half of the respondents are male, half are female. The sample is an unrestricted random-digit dial (RDD) sampling procedure that minimizes serial bias and includes both unlisted and listed telephone numbers. Details of the CARAVAN[®] landline sampling methodology is included in Appendix G. Only one interview is conducted per household. The sample is fully replicated and stratified by region, and projects to the national level with a confidence level of 95 percent. The telephone numbers selected are subject to a maximum of four attempts to complete an interview.

The interviewing period is from Thursday to Sunday (CARAVAN[®] A) and Friday to Monday (CARAVAN[®] B). Interviewers are fully briefed and trained prior to each wave of CARAVAN[®]. A team of quality assurance individuals monitors the study during the field period.

After screening to determine if the respondent on the phone was also the person in the household with the primary responsibility for handling the receipt, sorting, and other tasks related to that household's mail, a total of 520 interviews were completed.

To address the growing issue of non-coverage resulting from the growth in households without a landline telephone (estimated at 20 to 30 percent of all U.S. households), the landline sample used in CARAVAN[®] was supplemented by a sample (n = 126) of consumers interviewed on their cell phones. The cell phone sample was produced by SSI, Inc., a leading provider of survey sampling to the research community. Details on the cell phone sampling methodology are included in Appendix G.

6.3.3 Weighting

In probability-based samples such as CARAVAN[®], the basis of the weighting is the inverse of the selection probability. Then, weighting adjustments are frequently used to reduce the potential for biases that may be present due to incomplete frame coverage and survey non-response, both of which are inherent in all telephone surveys. These adjustments may take advantage of geographic, demographic, and socioeconomic information that is known for the population as well as measured in the sample surveys. The adjustments reduce potential bias to the extent that the survey respondents and non-respondents (non-contacts, refusals, etc.) with similar geographic, demographic, and socioeconomic characteristics are also similar with respect to the survey statistics of interest. In other words, post-survey weighting adjustments reduce bias if the weighting variables are related to (correlated with) the survey measures and the likelihood of survey participation. Full details on how the CARAVAN[®] data are weighted are included in Appendix G.

A total of 646 consumers provided data on four products, resulting in data for 908 products as shown in Figure 11:

Figure 11: Consumer Sample

Product(s) Used	Number of Respondents Who Use Product
First-Class Mail	576
Priority Mail	201
Express Mail	78
Parcel Post	53

6.3.4 Data Cleaning

Consumer data were reviewed and eight respondents were dropped because the number of items they shipped using each type of mail or shipping product did not equal the total number of items they originally reported sending in the past 12 months. Because this was included as part of CARAVAN[®] study, respondents were allowed to

continue with the remainder of the questions included for other participating clients and data was deleted when data collection was complete.

In addition, two respondents were dropped because they reported sending more than 500 pieces of mail or packages in the past 12 months. This volume is atypical for a consumer and suggests that the respondent may be operating a business at home.

6.4 Volume Forecast Calculations¹

The primary deliverables from this quantitative research are forecasts of how a switch to five-day delivery would affect use of Postal Service products. Separate forecasts were developed for each applicable product within each of the five segments.

6.4.1 Business Forecast Calculations

For the business segments, volume for each product at each of three time periods (past 12 months, next 12 months, and first 12 months after institution of five-day delivery) was computed at the respondent level. Volume for Premier and Preferred Accounts was weighted (as described in Section 6.2.3 and 6.2.4, respectively). For each of the three time periods, respondents were asked what percentage of their mail was sent via each postal product as well as other non-Postal Service methods. These percentages were then multiplied by the total volume for the corresponding time period to determine the volume for each product. For example, if a respondent sent a total of 100,000 unique pieces of mail in the past 12 months, 80 percent via First-Class Mail and the remaining 20 percent via Priority Mail, the volume per product would be calculated as follows:

Figure 12: Example of Volume Calculation by Product for Business Segments

Product	% Allocation	Total Volume	Total Pieces
First Class Mail	80	100,000	80,000
Priority Mail	20		20,000
Total	100		100,000

¹ See workbooks USPS 5-Day Delivery – Business Daa File and Forecasts_final.xlsm, and USPS 5 Day – Consumer Data File and Forecast – 11-22-2009.xls, both in USPS-LR-N2010-1/NP2.

Respondents' ratings for the likelihood that the change to five-day delivery would cause their organizations to change how their mail and package volumes is sent (11-point scale: "0" represents "extremely unlikely"; "10" represents "extremely likely") was used to adjust the volume forecasts. The likelihood of change measure (0–10 scale) was converted to a percentage by dividing the response by 10. For example, a score of 10 ("extremely likely" to change) was converted to 100 percent and a score of 0 ("extremely unlikely" to change) was converted to 0 percent.

The difference between the next 12-month volume and the volume in the first 12 months after institution of five-day delivery was multiplied by this likelihood of change percentage, and the result was added back to next 12-month volume. Volume data are weighted (as described in Section 6.2.3 and 6.2.4, respectively). This effectively adjusted the reported impact of five-day delivery to reflect the likelihood of that change.

Figure 13: Example of Calculating Volume Change in Business Segments

Planned Volume of First-Class Mail in Next 12 Months	Planned Volume of First-Class Mail in First 12 Months after Five-Day Delivery	Likelihood of Change (0–10 scale)	Adjusted Volume of First-Class Mail if Five-Day Delivery Is Implemented*
100,000	90,000	5	95,000

* $(90,000 \text{ pieces of First-Class Mail} - 100,000 \text{ pieces of First-Class Mail}) \times (5 / 10) + 100,000 \text{ pieces of FCM} = 95,000 \text{ pieces of First-Class Mail}$

The final business forecasts were calculated based on averages across all respondents in the applicable segment of the measures described above. In addition, the percentage change attributable to the change to five-day deliver was computed

- *Adjusted % Change Attributable to Switch as Percentage of **Past** 12-Month Volume* = (Adjusted Volume if Five-Day Delivery Implemented – Next 12-Month Volume Before Five-Day Delivery Was Mentioned) / Past 12-Month Volume
- *Adjusted % Change Attributable to Switch as Percentage of **Next** 12-Month Volume* = (Adjusted Volume if Five-Day Delivery Implemented – Next 12-Month Volume Before Five-Day Delivery Was Mentioned) / Next 12-Month Volume Before Five-Day Delivery Was Mentioned.

These calculations resulted in the following forecasts for each business segment:

Figure 14: National Accounts Volume Forecasts

Segment: National Accounts (n=59)												
Product	Calculate Average Across Respondents					Changes Calculated Based on Averages Across Respondents						
	Insert Individual Respondent Data											
	Mean Volume (12 Month Period)				Likelihood of Change (Q10 Rating)	Adjusted Future Volume IF Concept Implemented	% Change from Past 12 Month Volume		% Change Attributable to Switch to 5-Day			
	Past 12 Months	Future Volume (Next 12 Months)		IF 5-Day Concept Implemented (Raw)			If No Service Change	Unadjusted		Adjusted		
		Before 5-Day Concept Mentioned	If 5-Day Concept Implemented					As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume	As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume	
B	C	D	E	F	G	H	I	J	K	L		
Single Piece First-Class Mail -- MEAN	1,200,976	1,356,902	1,337,494		1,342,990	13.0%	11.4%	-1.6%	-1.4%	-1.2%	-1.0%	
Presort First-Class Mail -- MEAN	78,237,613	84,330,261	79,980,584		83,471,124	7.8%	2.2%	-5.6%	-5.2%	-1.1%	-1.0%	
Regular Standard / Bulk Mail -- MEAN	6,905,817	6,919,541	6,774,325		6,890,498	0.2%	-1.9%	-2.1%	-2.1%	-0.4%	-0.4%	
Nonprofit Standard / Bulk Mail -- MEAN	136,715	124,986	157,079		131,405	-8.6%	14.9%	23.5%	25.7%	4.7%	5.1%	
Priority Mail -- MEAN	568,470	522,821	431,975		482,172	-8.0%	-24.0%	-16.0%	-17.4%	-7.2%	-7.8%	
Express Mail -- MEAN	579,030	679,553	645,546		672,741	17.4%	11.5%	-5.9%	-5.0%	-1.2%	-1.0%	
Regular Periodical Mail -- MEAN	18,692,820	18,692,550	18,692,550		18,692,550	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Nonprofit Periodical Mail -- MEAN	78,309	93,904	93,904		93,904	19.9%	19.9%	0.0%	0.0%	0.0%	0.0%	

NOTE: All data are based on all respondents from National Accounts

NOTE: For respondents who claim Parcel Select volume in Q2 but do not show such volume in the USPS database, the volume they attribute to Parcel Select has been reset to 0

Explanation of Columns:

The following columns require calculation of means (for each product) based on data for each respondent in the segment (including those with a value of 0):

Column B: sum of # of pieces across applications in Q1 * proportion of these sent using applicable product in Q3 (using 100% if only this product was selected in Q2)

Column C: sum of # of pieces across applications in Q4 * proportion of these that would be sent using applicable product in Q6 (using 100% if only this product was selected in Q5)

Column D: sum of # of pieces across applications in Q7 * proportion of these that would be sent using applicable product in Q9 (using 100% if only this product was selected in Q8)

Column E: (Column D - Column C) * (Column E/1 0) + Column C

Column F: response to Q10 (Likelihood that change to 5-Day would impact volume of pieces or how they are sent; do not average across respondents)

The following columns require calculations based on the means in the previous columns:

Column G: (Column C - Column B) / Column B

Column H: (Column D - Column B) / Column B

Column I: (Column D - Column C) / Column B

Column J: (Column D - Column C) / Column C

Column K: (Column F - Column C) / Column B

Column L: (Column F - Column C) / Column C

Figure 15: Premier Accounts Volume Forecasts

Segment: Premier Accounts (n=630)											
Product	Calculate Average Across Respondents					Changes Calculated Based on Averages Across Respondents					
	Insert Individual Respondent Data					% Change from Past 12 Month Volume		% Change Attributable to Switch to 5-Day			
	Mean Volume (12 Month Period)			Likelihood of Change (Q10 Rating)	Adjusted Future Volume IF Concept Implemented	If No Service Change	IF 5-Day Concept Implemented (Raw)	Unadjusted		Adjusted	
	Past 12 Months	Future Volume (Next 12 Months)						As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume	As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume
	B	Before 5-Day Concept Mentioned	If 5-Day Concept Implemented	E	F	G	H	I	J	K	L
Single Piece First-Class Mail -- MEAN	122,668	111,248	112,595		113,127	-9.3%	-8.2%	1.1%	1.2%	1.5%	1.7%
Presort First-Class Mail -- MEAN	1,105,332	831,045	832,672		827,315	-24.8%	-24.7%	0.1%	0.2%	-0.3%	-0.4%
Regular Standard / Bulk Mail -- MEAN	481,176	438,606	439,479		442,552	-8.8%	-8.7%	0.2%	0.2%	0.8%	0.9%
Nonprofit Standard / Bulk Mail -- MEAN	48,810	54,559	53,297		52,389	11.8%	9.2%	-2.6%	-2.3%	-4.4%	-4.0%
Priority Mail -- MEAN	51,095	16,038	15,447		15,666	-68.6%	-69.8%	-1.2%	-3.7%	-0.7%	-2.3%
Express Mail -- MEAN	27,551	12,890	10,887		12,518	-53.2%	-60.5%	-7.3%	-15.5%	-1.3%	-2.9%
Regular Periodical Mail -- MEAN	31,044	32,285	31,461		32,058	4.0%	1.3%	-2.7%	-2.6%	-0.7%	-0.7%
Nonprofit Periodical Mail -- MEAN	26,276	21,690	22,006		22,272	-17.5%	-16.2%	1.2%	1.5%	2.2%	2.7%

NOTE: All data are based on all respondents from Premier Accounts; data are weighted

NOTE: For respondents who claim Parcel Select volume in Q2 but do not show such volume in the USPS database, the volume they attribute to Parcel Select has been reset to 0

Explanation of Columns:

The following columns require calculation of means (for each product) based on data for each respondent in the segment (including those with a value of 0):

Column B: sum of # of pieces across applications in Q1 * proportion of these sent using applicable product in Q3 (using 100% if only this product was selected in Q2)

Column C: sum of # of pieces across applications in Q4 * proportion of these that would be sent using applicable product in Q6 (using 100% if only this product was selected in Q5)

Column D: sum of # of pieces across applications in Q7 * proportion of these that would be sent using applicable product in Q9 (using 100% if only this product was selected in Q8)

Column F: (Column D - Column C) * (Column E/1.0) + Column C

Column E: response to Q10 (Likelihood that change to 5-Day would impact volume of pieces or how they are sent; do not average across respondents)

The following columns require calculations based on the means in the previous columns:

Column G: (Column C - Column B) / Column B

Column H: (Column D - Column B) / Column B

Column I: (Column D - Column C) / Column B

Column J: (Column D - Column C) / Column C

Column K: (Column F - Column C) / Column B

Column L: (Column F - Column C) / Column C

Figure 16: Preferred Accounts Volume Forecasts

Segment: Preferred Accounts (n=738)											
Product	Calculate Average Across Respondents					Changes Calculated Based on Averages Across Respondents					
	Insert Individual Respondent Data					% Change from Past 12 Month Volume		% Change Attributable to Switch to 5-Day			
	Mean Volume (12 Month Period)			Likelihood of Change (Q10 Rating)	Adjusted Future Volume IF Concept Implemented	If No Service Change	IF 5-Day Concept Implemented (Raw)	Unadjusted		Adjusted	
	Past 12 Months	Future Volume (Next 12 Months)						As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume	As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume
	B	Before 5-Day Concept Mentioned	If 5-Day Concept Implemented	E	F	G	H	I	J	K	L
Single Piece First-Class Mail -- MEAN	20,620	25,042	25,042		24,842	21.4%	21.4%	0.0%	0.0%	-1.0%	-0.8%
Presort First-Class Mail -- MEAN	9,123	6,535	6,284		6,487	-28.4%	-31.1%	-2.8%	-3.8%	-0.5%	-0.7%
Regular Standard / Bulk Mail -- MEAN	9,738	6,151	6,131		6,101	-36.8%	-37.0%	-0.2%	-0.3%	-0.5%	-0.8%
Nonprofit Standard / Bulk Mail -- MEAN	3,950	4,399	4,427		4,435	11.4%	12.1%	0.7%	0.6%	0.9%	0.8%
Priority Mail -- MEAN	2,282	2,007	2,008		1,937	-12.1%	-12.0%	0.0%	0.0%	-3.1%	-3.5%
Express Mail -- MEAN	843	839	675		779	-0.5%	-19.9%	-19.4%	-19.5%	-7.0%	-7.1%
Regular Periodical Mail -- MEAN	625	475	486		469	-23.9%	-22.3%	1.7%	2.2%	-1.0%	-1.3%
Nonprofit Periodical Mail -- MEAN	237	231	232		231	-2.5%	-2.0%	0.4%	0.4%	0.1%	0.1%

NOTE: All data are based on all respondents from Preferred Accounts; data are weighted

NOTE: For respondents who claim Parcel Select volume in Q2 but do not show such volume in the USPS database, the volume they attribute to Parcel Select has been reset to 0

Explanation of Columns:

The following columns require calculation of means (for each product) based on data for each respondent in the segment (including those with a value of 0):

Column B: sum of # of pieces across applications in Q1 * proportion of these sent using applicable product in Q3 (using 100% if only this product was selected in Q2)

Column C: sum of # of pieces across applications in Q4 * proportion of these that would be sent using applicable product in Q6 (using 100% if only this product was selected in Q5)

Column D: sum of # of pieces across applications in Q7 * proportion of these that would be sent using applicable product in Q9 (using 100% if only this product was selected in Q8)

Column F: (Column D - Column C) * (Column E/1.0) + Column C

Column E: response to Q10 (Likelihood that change to 5-Day would impact volume of pieces or how they are sent; do not average across respondents)

The following columns require calculations based on the means in the previous columns:

Column G: (Column C - Column B) / Column B

Column H: (Column D - Column B) / Column B

Column I: (Column D - Column C) / Column B

Column J: (Column D - Column C) / Column C

Column K: (Column F - Column C) / Column B

Column L: (Column F - Column C) / Column C

Figure 17: Small Business Volume Forecasts

Segment: Small Businesses (n=725)											
Product	Calculate Average Across Respondents					Changes Calculated Based on Averages Across Respondents					
	Insert Individual Respondent Data					% Change from Past 12 Month Volume		% Change Attributable to Switch to 5-Day			
	Mean Volume (12 Month Period)			Likelihood of Change (Q10 Rating)	Adjusted Future Volume IF Concept Implemented	If No Service Change	IF 5-Day Concept Implemented (Raw)	Unadjusted		Adjusted	
	Past 12 Months	Future Volume (Next 12 Months)						As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume	As % of PAST 12 Month Volume	As % of NEXT 12 Month Volume
	B	Before 5-Day Concept Mentioned	If 5-Day Concept Implemented	E	F	G	H	I	J	K	L
First-Class Mail -- MEAN	1,605	1,449	1,352		1,418	-9.7%	-15.8%	-6.1%	-6.7%	-2.0%	-2.2%
Priority Mail -- MEAN	212	242	242		242	14.2%	14.2%	0.0%	0.0%	0.0%	0.0%
Express Mail -- MEAN	43	36	34		32	-17.0%	-21.2%	-4.2%	-5.1%	-7.9%	-9.6%

NOTE: All data are based on all respondents from Small Businesses

NOTE: For respondents who claim Parcel Select volume in Q2 but do not show such volume in the USPS database, the volume they attribute to Parcel Select has been reset to 0

Explanation of Columns:

The following columns require calculation of means (for each product) based on data for each respondent in the segment (including those with a value of 0):

Column B: sum of # of pieces across applications in Q1 * proportion of these sent using applicable product in Q3 (using 100% if only this product was selected in Q2)

Column C: sum of # of pieces across applications in Q4 * proportion of these that would be sent using applicable product in Q6 (using 100% if only this product was selected in Q5)

Column D: sum of # of pieces across applications in Q7 * proportion of these that would be sent using applicable product in Q9 (using 100% if only this product was selected in Q8)

Column F: (Column D - Column C) * (Column E/1 0) + Column C

Column E: response to Q10 (Likelihood that change to 5-Day would impact volume of pieces or how they are sent; do not average across respondents)

The following columns require calculations based on the means in the previous columns:

Column G: (Column C - Column B) / Column B

Column H: (Column D - Column B) / Column B

Column I: (Column D - Column C) / Column B

Column J: (Column D - Column C) / Column C

Column K: (Column F - Column C) / Column B

Column L: (Column F - Column C) / Column C

6.4.2 Consumer Forecast Calculations

Respondents were asked to allocate their volume to each product under two scenarios:

- Actual past 12-month volume
- Past 12-month volume had five-day delivery been in place a year ago.

Since consumer respondents allocated actual volumes (number of pieces) rather than the percent of total volume, it was not necessary to calculate the volumes (unlike with business respondents). All volume data are weighted according to the process described in Section 6.3.3.

As with the business respondents, adjusted volume was computed for each respondent based on ratings of how likely he or she was to change how mail would have been sent for each application if five-day delivery had been in place during that 12-month period, on an 11-point scale, where “0” represented “extremely unlikely” and “10” represented “extremely likely.” The likelihood of change measure (0–10 scale) was converted to a percentage by dividing the response by 10. This percentage was multiplied by the difference between the past 12-month volume and the estimate of what past 12-month volume would have been if five-day delivery had been in place a year ago. This effectively adjusted the reported impact of five-day delivery to reflect the likelihood of that impact.

Figure 18: Calculation of Adjusted Volume for Consumers

Reported Volume of First Class Mail in Past 12 Months	Reported Volume of First Class Mail in Past 12 Months if Five-Day Delivery Had Been in Place	Likelihood of Change (0–10 scale)	Adjusted Volume of First Class Mail if Five-Day Delivery Is Implemented*
100	90	5	95

* $(90 \text{ pieces of First-Class Mail} - 100 \text{ pieces of First-Class Mail}) \times (5 / 10) + 100 \text{ pieces of First-Class Mail} = 95 \text{ pieces of First-Class Mail}$

A total volume measure for each product was calculated for each respondent by summing the adjusted volume for each across all of the applications used by a household. Note while volume data was collected for parcel post, the resulting sample size was deemed to be too small for reliable analysis. In addition, parcel post shipments by consumers have a relatively small impact on Postal Service volume.

The final consumer forecasts were then calculated based on averages across all respondents. In addition, the percentage change in volume for each product was computed, as follows:

- *Adjusted % Change Attributable to Switch as Percentage of Past 12-Month Volume*
= (Adjusted Volume if Five-Day Delivery Had Been Implemented – Past 12-Month Volume) / Past 12-Month Volume

These calculations resulted in the following forecasts for consumers

Figure 19: Consumer Forecasts

Segment: Consumers (n=636)

	TOTAL ACROSS ALL FOUR APPLICATIONS			% Change Attributable to Switch to 5-Day	
	Mean Volume (Past 12 Months)		Adjusted Volume If Concept Had Been Implemented	Unadjusted	Adjusted
	Actual	Estimate if 5-day Concept Had Been in Place			
Product (gre codes)	<i>B</i>	<i>C</i>	<i>D</i>	<i>E</i>	<i>F</i>
FCM (a) -- MEAN	65.00	63.13	63.73	-2.9%	-1.9%
Priority Mail (b) -- MEAN	2.87	4.09	3.33	42.5%	16.0%
Express Mail (c) -- MEAN	0.96	1.07	1.06	11.4%	10.1%

NOTE: All data are based on all Consumer respondents

Explanation of Columns:

Column B: total # of pieces sent in past 12 months

Column C: total # of pieces would have sent in past 12 months if change had been in place

Column D: Sum of (Estimate if 5-Day Concept Had Been in Place - Actual) * (Likelihood to Change/10) + Actual for Each Product

Column E: (Column C - Column B) / Column B

Column F: (Column D - Column B) / Column B

Appendix A: Focus Group Screeners

Part 1: Business Focus Groups Screeners

Original Business Screener – Used in Chicago and Seattle

Introduction

Hello, my name is _____ and I am calling from [INSERT FACILITY NAME], an independent research firm. We are conducting a series of focus group discussions on behalf of the US Postal Service with business people like yourself about some proposed changes to postal services.

Are you the person in your business who is primarily responsible for the receipt, sorting, and other tasks related to business' mail and shipping? This includes both receiving and sending mail, packages, etc.

- Yes – Continue
- No – Ask to speak to that person – If not available schedule callback

We wish to talk with businesses like yours during an informal **two-hour** group discussion. The groups are information-gathering sessions **only**. We are not selling anything. We simply want to know your opinions and I assure you that your individual responses will be kept completely confidential.

The discussion groups are taking place [INSERT DATE FROM GRID BELOW]. You will be given \$150 in recognition of your participation. A light meal or refreshments will be provided. In order to confirm your attendance, I need to ask you some questions.

Date	Time	Composition	Location	Incentive
September 1, 2009	Noon	Primarily (75% or more) USPS Shippers	Downtown Chicago	\$150.00
September 1, 2009	5:30 P.M.	Use Standard Mail	Downtown Chicago	\$150.00
September 15, 2009	Noon	Primarily (75% or more) USPS Shippers	Downtown Seattle	\$150.00
September 16, 2009	Noon	Use Standard Mail	Kirkland	\$150.00
September 21, 2009	5:30 P.M.	Use Fed EX and/or UPS and USPS	Manhattan	\$150.00
September 22, 2009	Noon	Use First Class Mail	Westchester	\$150.00
September 24, 2009	7:30 A.M.	Use First Class	Atlanta	\$150.00
September 24, 2009	Noon	Use Fed EX and/or UPS and USPS	Atlanta	\$150.00

Screener

1. Which of the following broad categories best describes the number of people your company employs? Include yourself as an employee.

<input type="radio"/> One – verify that respondent is including themselves as an employee	RECRUIT NO MORE THAN 2 PER GROUP
<input type="radio"/> At least 2 employees but no more than 5 <input type="radio"/> At least 5 employees but no more than 10 <input type="radio"/> At least 10 employees but no more than 20 <input type="radio"/> At least 20 employees but no more than 50 <input type="radio"/> At least 50 employees but no more than 100	RECRUIT A MIX
<input type="radio"/> More than 100 employees	TERMINATE

2. Does any of the following describe your business?

<input type="radio"/> Advertising or Public Relations <input type="radio"/> Market Research <input type="radio"/> US Postal Service <input type="radio"/> UPS <input type="radio"/> Fed Ex <input type="radio"/> Mail or Small Package Delivery Service	TERMINATE
<input type="radio"/> NONE OF THE ABOVE	CONTINUE

3. Which of the following best describes your type of business?

<input type="radio"/> Financial Services <input type="radio"/> Professional Services <input type="radio"/> Other services <input type="radio"/> Government <input type="radio"/> Retail <input type="radio"/> Wholesale <input type="radio"/> Manufacturing <input type="radio"/> Utilities <input type="radio"/> Telecommunications <input type="radio"/> Transportation <input type="radio"/> Publishing (Newspapers / catalogs) <input type="radio"/> Mail Order	RECRUIT A MIX
--	----------------------

<input type="radio"/> Government	
<input type="radio"/> Not-for Profit	RECRUIT NO MORE THAN 2 PER GROUP
<input type="radio"/> Other (specify) _____	

4. Which of the following, if any, best describes your company?

<input type="radio"/> Letter Shop	RRECRUIT NO MORE THAN 2 / GROUP
<input type="radio"/> Printer	
<input type="radio"/> Presort Bureau	
<input type="radio"/> Mail Service Provider	
<input type="radio"/> None of the above	

5. When was the last time you participated in a focus group discussion?

<input type="radio"/> Within the Last 12 months When was the group? _____ What was the topic of this group? _____	CONTINUE WITH SCREENER; DO NOT RECRUIT; SAVE AS POTENTIAL RECRUIT
<input type="radio"/> Over 12 months ago <input type="radio"/> Never	CONTINUE

6. Does your company pay for postal services by . . .

<input type="radio"/> Postage Meter	PREFERRED ACCOUNT	RECRUIT A MIX
<input type="radio"/> Permit Imprint		
<input type="radio"/> Express Mail Corporate Account		
<input type="radio"/> PC Postage		
<input type="radio"/> None of the Above	SMALL BUSINESS / NOT PREFERRED	

7. Which of the following types of services does your company use to send and receive mail and/or packages domestically? [CHECK ALL THAT APPLY]

<input type="radio"/> First Class Mail through USPS	
<input type="radio"/> Standard Mail through USPS	
<input type="radio"/> Express Mail through USPS	
<input type="radio"/> Priority Mail through USPS	
<input type="radio"/> Parcel Select through USPS	

<input type="radio"/> Parcel Post through USPS <input type="radio"/> Media Mail through USPS	
<input type="radio"/> Federal Express <input type="radio"/> UPS <input type="radio"/> Some other Shipping Service (specify)	
<input type="radio"/> None of the Above	TERMINATE

8. Which of the following types of mail does your company send using USPS First Class Mail? [CHECK ALL THAT APPLY]

<input type="radio"/> Bills, Invoices, or Statements <input type="radio"/> Payments <input type="radio"/> Advertising or Marketing Materials (including catalogs) <input type="radio"/> General Correspondence <input type="radio"/> Customer Notifications <input type="radio"/> Investor / Shareholder Mailings <input type="radio"/> Cards (e.g., holiday cards) <input type="radio"/> Other (specify)	RECRUIT MIX FOR WESTCHESTER – NOON ATLANTA – 7:30 A.M.
<input type="radio"/> Periodicals <input type="radio"/> Newspapers	DO NOT RECRUIT FOR FOCUS GROUPS; INSTEAD SAVE AND DIRECT TO ORC – WE WILL SCHEDULE FOR IN-DEPTH INTERVIEWS
<input type="radio"/> NONE OF THE ABOVE	IF RECRUITING IN WESTCHESTER OR ATLANTA -- TERMINATE

9. [IF Q5 EQ POSTAGE METER / PERMIT IMPRINT] Approximately how many pieces of mail do you estimate your company sends and/or receives in a typical week? Would it be . . .

<input type="radio"/> 100 or Fewer pieces <input type="radio"/> At least 100 pieces up to 250 pieces <input type="radio"/> At least 250 up to 500 pieces <input type="radio"/> More than 500 pieces	RECRUIT MIX
--	--------------------

10. [IF Q5 NE POSTAGE METER / PERMIT IMPRINT] Approximately how many pieces of mail do you estimate your company sends and/or receives in a typical week? Would it be . . .

<input type="radio"/> 25 or Fewer pieces <input type="radio"/> At least 25 up to 100 pieces <input type="radio"/> More than 100 pieces	RECRUIT MIX
--	--------------------

11. Approximately how many packages do you estimate your company ships and/or receives in a typical week?

Would it be

<input type="radio"/> Less than 25 packages <input type="radio"/> At least 25 pieces but less than 65 pieces <input type="radio"/> More than 65 pieces	RECRUIT MIX
<input type="radio"/> None	

12. Which of the types of mail does your company send using USPS Standard Mail? [CHECK ALL THAT APPLY]

<input type="radio"/> Advertising or Marketing Materials – Includes printed matter, flyers, circulars, newsletters, catalogs, and small packages, etc.	RECRUIT FOR DT CHICAGO – 5:30 P.M. KIRKLAND -- NOON
<input type="radio"/> Periodicals <input type="radio"/> Newspapers	DO NOT RECRUIT FOR FOCUS GROUPS; INSTEAD SAVE AND DIRECT TO ORC – WE WILL SCHEDULE FOR IN-DEPTH INTERVIEWS
<input type="radio"/> NONE OF THE ABOVE	IF RECRUITING IN KIRKLAND OR DT CHICAGO – TERMINATE

13. Now thinking about how your company ships packages? Which of the following broad categories captures the amount of packages your company ships through USPS?

<input type="radio"/> None <input type="radio"/> Ship less than 10 percent through USPS	TERMINATE IF RECRUITING IN DT CHICAGO (UNLESS QUALIFY FOR USPS STANDARD MAIL GROUP) DT SEATTLE MANHATTAN ATLANTA (UNLESS QUALIFY FOR USPS FIRST CLASS MAIL GROUP)
<input type="radio"/> Ship at least 10 percent but less than 25 percent through USPS <input type="radio"/> Ship at least 25 percent but less than 50 percent through USPS <input type="radio"/> Ship at least 50 percent but less than 75 percent through USPS	IF SHIP THROUGH FEDERAL EXPRESS AND/OR UPS (QUESTION #6) AND SHIP AT LEAST 10 PERCENT BUT LESS THAN 75 PERCENT OF PACKAGES THROUGH USPS RECRUIT FOR MANHATTAN ATLANTA
<input type="radio"/> Ship at least 75 percent of packages through USPS <input type="radio"/> Ship 100 percent of packages through USPS	RECRUIT FOR DT CHICAGO DT SEATTLE IDEALLY WOULD LIKE MIX

14. What is your title?

<input type="radio"/> CEO / President / Owner <input type="radio"/> CFO <input type="radio"/> VP / Director of Finance <input type="radio"/> VP / Director of Marketing <input type="radio"/> VP / Director of Operations <input type="radio"/> Office or Business Manager <input type="radio"/> Accounting <input type="radio"/> Other _____	IF SOME OTHER TITLE, SAVE AND VERIFY WITH ORC IF PERSON QUALIFIES
--	--

INVITATION

Thank you for answering these questions. You do qualify to participate in a group scheduled:

- At [READ TIME FROM GRID]
- On [READ DATE FROM GRID]
- At [READ LOCATION FROM GRID]

As we are asking for your time, as a token of our appreciation we are offering to pay you \$150 in cash for your time. If you are available, we would love to have you. This discussion will involve 8 to 10 other business people just like yourself and will last about two hours. As we are recruiting a limited number of people for the group, we need to be able to rely on your attendance.

Are you available at that time?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

Great. Just to make sure. The group is an open discussion lead by a moderator. There will be 8 to 10 other business people in the group. Are you comfortable speaking out in a group setting such as this?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

The group will begin at [RE-READ TIME FROM GRID] but we ask that you arrive at least 15 minutes in advance, so by [READ ARRIVAL TIME FROM GRID] to give you time to get signed in before the group begins. We will have some light refreshments for you as well.

We will send you a confirmation letter along with directions to the facility where the groups will be held. We will also call you a day or two in advance of your scheduled group to remind you and confirm your attendance. I need the following information:

Name: _____
 Address: _____
 Daytime Phone: _____
 Evening Phone: _____
 Mobile Phone: _____
 E-Mail Address: _____

Updated Screener – Used in New York and Atlanta Shippers

Introduction

Hello, my name is _____ and I am calling from [INSERT FACILITY NAME], an independent research firm. We are conducting a series of focus group discussions on behalf of the US Postal Service with business people like yourself about some proposed changes to postal services.

Are you the person in your business who is primarily responsible for the receipt, sorting, and other tasks related to business' mail and shipping? This includes both receiving and sending mail, packages, etc.

- Yes – Continue
- No – Ask to speak to that person – If not available schedule callback

We wish to talk with businesses like yours during an informal **two-hour** group discussion. The groups are information-gathering sessions **only**. We are not selling anything. We simply want to know your opinions and I assure you that your individual responses will be kept completely confidential.

The discussion groups are taking place [INSERT DATE FROM GRID BELOW]. You will be given \$150 in recognition of your participation. A light meal or refreshments will be provided. In order to confirm your attendance, I need to ask you some questions.

Date	Time	Composition	Location	Incentive
September 21, 2009	5:30 P.M.	Use Fed EX and/or UPS and USPS	Manhattan	\$150.00
September 24, 2009	Noon	Use Fed EX and/or UPS and USPS	Atlanta	\$150.00

Screener

15. Which of the following broad categories best describes the number of people your company employs? Include yourself as an employee.

<input type="radio"/> One – verify that respondent is including themselves as an employee	RECRUIT NO MORE THAN 2 PER GROUP
<input type="radio"/> At least 2 employees but no more than 5 <input type="radio"/> At least 5 employees but no more than 10 <input type="radio"/> At least 10 employees but no more than 20 <input type="radio"/> At least 20 employees but no more than 50 <input type="radio"/> At least 50 employees but no more than 100	RECRUIT A MIX
<input type="radio"/> More than 100 employees	TERMINATE

16. Does any of the following describe your business?

<input type="radio"/> Advertising or Public Relations <input type="radio"/> Market Research <input type="radio"/> US Postal Service <input type="radio"/> UPS <input type="radio"/> Fed Ex <input type="radio"/> Mail or Small Package Delivery Service	TERMINATE
<input type="radio"/> NONE OF THE ABOVE	CONTINUE

17. Which of the following best describes your type of business?

<input type="radio"/> Financial Services <input type="radio"/> Professional Services <input type="radio"/> Other services <input type="radio"/> Government <input type="radio"/> Retail <input type="radio"/> Wholesale <input type="radio"/> Manufacturing <input type="radio"/> Utilities <input type="radio"/> Telecommunications <input type="radio"/> Transportation <input type="radio"/> Publishing (Newspapers / catalogs) <input type="radio"/> Mail Order <input type="radio"/> Government	RECRUIT A MIX
<input type="radio"/> Not-for Profit	RECRUIT NO MORE THAN 2 PER GROUP
<input type="radio"/> Other (specify) _____	

18. Which of the following, if any, best describes your company?

<input type="radio"/> Letter Shop <input type="radio"/> Printer <input type="radio"/> Presort Bureau <input type="radio"/> Mail Service Provider	RRECRUIT NO MORE THAN 2 / GROUP
<input type="radio"/> None of the above	

19. When was the last time you participated in a focus group discussion?

<input type="radio"/> Within the Last 12 months When was the group? _____ What was the topic of this group? _____	CONTINUE WITH SCREENER; DO NOT RECRUIT; SAVE AS POTENTIAL RECRUIT
<input type="radio"/> Over 12 months ago <input type="radio"/> Never	CONTINUE

20. Does your company pay for postal services by . . .

<input type="radio"/> Postage Meter <input type="radio"/> Permit Imprint <input type="radio"/> Express Mail Corporate Account <input type="radio"/> PC Postage	PREFERRED ACCOUNT	RECRUIT A MIX
<input type="radio"/> None of the Above	SMALL BUSINESS / NOT PREFERRED	

21. Which of the following types of services does your company use to send and receive mail and/or packages domestically? [CHECK ALL THAT APPLY]

<input type="radio"/> First Class Mail through USPS <input type="radio"/> Standard Mail through USPS <input type="radio"/> Express Mail through USPS <input type="radio"/> Priority Mail through USPS <input type="radio"/> Parcel Select through USPS <input type="radio"/> Parcel Post through USPS <input type="radio"/> Media Mail through USPS	
<input type="radio"/> Federal Express <input type="radio"/> UPS <input type="radio"/> Some other Shipping Service (specify)	
<input type="radio"/> None of the Above	TERMINATE

22. Approximately how many packages do you estimate your company ships and/or receives in a typical week? Would it be

<input type="radio"/> Less than 25 packages <input type="radio"/> At least 25 pieces but less than 65 pieces <input type="radio"/> More than 65 pieces	RECRUIT MIX
<input type="radio"/> None	TERMINATE

23. When you ship packages do you typically use . . . [CHECK ALL THAT APPLY]

<input type="radio"/> Federal Express <input type="radio"/> UPS (United Parcel)	IF DO NOT USE FED EX OR UPS TERMINATE
<input type="radio"/> USPS	IF ONLY USE USPS – TERMINATE
<input type="radio"/> Some other Shipping Service (specify) _____	SAVE AND CONFIRM

24. Now thinking about how your company ships packages? Which of the following broad categories captures the amount of packages your company ships through USPS?

<input type="radio"/> None <input type="radio"/> Ship less than 10 percent through USPS	TERMINATE
<input type="radio"/> Ship at least 10 percent but less than 25 percent through USPS <input type="radio"/> Ship at least 25 percent but less than 50 percent through USPS <input type="radio"/> Ship at least 50 percent but less than 75 percent through USPS	RECRUIT MIX
<input type="radio"/> Ship at least 75 percent of packages through USPS <input type="radio"/> Ship 100 percent of packages through USPS	TERMINATE

25. What is your title?

<input type="radio"/> CEO / President / Owner <input type="radio"/> CFO <input type="radio"/> VP / Director of Finance <input type="radio"/> VP / Director of Marketing <input type="radio"/> VP / Director of Operations <input type="radio"/> Office or Business Manager <input type="radio"/> Accounting <input type="radio"/> Other _____	IF SOME OTHER TITLE, SAVE AND VERIFY WITH ORC IF PERSON QUALIFIES
--	--

INVITATION

Thank you for answering these questions. You do qualify to participate in a group scheduled:

- At [READ TIME FROM GRID]
- On [READ DATE FROM GRID]
- At [READ LOCATION FROM GRID]

As we are asking for your time, as a token of our appreciation we are offering to pay you \$150 **in cash** for your time. If you are available, we would love to have you. This discussion will involve 8 to 10 other business people just like yourself and will last about **two hours**. As we are recruiting a limited number of people for the group, we need to be able to rely on your attendance.

Are you available at that time?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

Great. Just to make sure. The group is an open discussion lead by a moderator. There will be 8 to 10 other business people in the group. Are you comfortable speaking out in a group setting such as this?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

The group will begin at [RE-READ TIME FROM GRID] but we ask that you arrive at least 15 minutes in advance, so by [READ ARRIVAL TIME FROM GRID] to give you time to get signed in before the group begins. We will have some light refreshments for you as well.

We will send you a confirmation letter along with directions to the facility where the groups will be held. We will also call you a day or two in advance of your scheduled group to remind you and confirm your attendance. I need the following information:

Name: _____

Address: _____

Daytime Phone: _____

Evening Phone: _____

Mobile Phone: _____

E-Mail Address: _____

Updated Screener New York and Atlanta – Standard Mail Services

Introduction

Hello, my name is _____ and I am calling from [INSERT FACILITY NAME], an independent research firm. We are conducting a series of focus group discussions on behalf of the US Postal Service with business people like yourself about some proposed changes to postal services.

Are you the person in your business who is primarily responsible for the receipt, sorting, and other tasks related to business' mail and shipping? This includes both receiving and sending mail, packages, etc.

- Yes – Continue
- No – Ask to speak to that person – If not available schedule callback

We wish to talk with businesses like yours during an informal **two-hour** group discussion. The groups are information-gathering sessions **only**. We are not selling anything. We simply want to know your opinions and I assure you that your individual responses will be kept completely confidential.

The discussion groups are taking place [INSERT DATE FROM GRID BELOW]. You will be given \$150 in recognition of your participation. A light meal or refreshments will be provided. In order to confirm your attendance, I need to ask you some questions.

Date	Time	Composition	Location	Incentive
September 21, 2009	Noon	Retail / Saturday	Westchester	\$150.00
September 24, 2009	7:30 A.M.	Retail / Saturday	Atlanta	\$150.00

Screener

26. Which of the following broad categories best describes the number of people your company employs? Include yourself as an employee.

<input type="radio"/> One – verify that respondent is including themselves as an employee	RECRUIT NO MORE THAN 2 PER GROUP
<input type="radio"/> At least 2 employees but no more than 5 <input type="radio"/> At least 5 employees but no more than 10 <input type="radio"/> At least 10 employees but no more than 20 <input type="radio"/> At least 20 employees but no more than 50 <input type="radio"/> At least 50 employees but no more than 100	RECRUIT A MIX
<input type="radio"/> More than 100 employees	TERMINATE

27. Does any of the following describe your business?

<input type="radio"/> Advertising or Public Relations <input type="radio"/> Market Research <input type="radio"/> US Postal Service <input type="radio"/> UPS <input type="radio"/> Fed Ex <input type="radio"/> Mail or Small Package Delivery Service	TERMINATE
<input type="radio"/> NONE OF THE ABOVE	CONTINUE

28. Which of the following best describes your type of business?

<input type="radio"/> Retail with Storefront – e.g., grocery, clothing store, dry cleaners, auto dealer, etc. <input type="radio"/> Online Retailer <input type="radio"/> Restaurant <input type="radio"/> Hotel / Motel <input type="radio"/> Real Estate <input type="radio"/> Entertainment – e.g., theatre, movies	RECRUIT A MIX
<input type="radio"/> None of the Above	TERMINATE
<input type="radio"/> Other (specify) _____	SAVE AND CHECK

4. Does your business use direct mail campaigns to increase traffic to and/or sales for your business? This could include printed matter, flyers, circulars, newsletters, catalogs. Also, they can be mailings you do on your own or as part of a shared mailing service such as ValPak.

<input type="radio"/> Yes	CONTINUE
<input type="radio"/> No	TERMINATE

29. When you do these mailings, do you mail 200 more pieces?

<input type="radio"/> Yes	CONTINUE
<input type="radio"/> No	TERMINATE

30. When you do these mailings, do you use Standard mail, which is less expensive than first class mail and is discounted postage?

<input type="radio"/> Yes	CONTINUE
<input type="radio"/> No	TERMINATE

31. When you do these mailings, do you do them on your own or as part of a shared mailing, such as ValPak?

<input type="radio"/> On Own <input type="radio"/> Part of Shared Mailing	RECRUIT MIX
--	--------------------

32. When was the last time you participated in a focus group discussion?

<input type="radio"/> Within the Last 12 months When was the group? _____ What was the topic of this group? _____	CONTINUE WITH SCREENER; DO NOT RECRUIT; SAVE AS POTENTIAL RECRUIT
<input type="radio"/> Over 12 months ago <input type="radio"/> Never	CONTINUE

33. Does your company pay for postal services by . . .

<input type="radio"/> Postage Meter <input type="radio"/> Permit Imprint <input type="radio"/> Express Mail Corporate Account <input type="radio"/> PC Postage	PREFERRED ACCOUNT	RECRUIT A MIX
<input type="radio"/> None of the Above	SMALL BUSINESS / NOT PREFERRED	

34. Which of the following types of services does your company use to send and receive mail and/or packages domestically? [CHECK ALL THAT APPLY]

<input type="radio"/> First Class Mail through USPS <input type="radio"/> Standard Mail through USPS <input type="radio"/> Express Mail through USPS <input type="radio"/> Priority Mail through USPS <input type="radio"/> Parcel Select through USPS <input type="radio"/> Parcel Post through USPS <input type="radio"/> Media Mail through USPS	
<input type="radio"/> Federal Express <input type="radio"/> UPS <input type="radio"/> Some other Shipping Service (specify) _____	
<input type="radio"/> None of the Above	TERMINATE

35. What is your title?

<p><input type="radio"/> CEO / President / Owner</p> <p><input type="radio"/> CFO</p> <p><input type="radio"/> VP / Director of Finance</p> <p><input type="radio"/> VP / Director of Marketing</p> <p><input type="radio"/> VP / Director of Operations</p> <p><input type="radio"/> Office or Business Manager</p> <p><input type="radio"/> Accounting</p> <p><input type="radio"/> Other _____</p>	<p>IF SOME OTHER TITLE, SAVE AND VERIFY WITH ORC IF PERSON QUALIFIES</p>
---	---

INVITATION

Thank you for answering these questions. You do qualify to participate in a group scheduled:

- At [READ TIME FROM GRID]
- On [READ DATE FROM GRID]
- At [READ LOCATION FROM GRID]

As we are asking for your time, as a token of our appreciation we are offering to pay you \$150 **in cash** for your time. If you are available, we would love to have you. This discussion will involve 8 to 10 other business people just like yourself and will last about **two hours**. As we are recruiting a limited number of people for the group, we need to be able to rely on your attendance.

Are you available at that time?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

Great. Just to make sure. The group is an open discussion lead by a moderator. There will be 8 to 10 other business people in the group. Are you comfortable speaking out in a group setting such as this?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

The group will begin at [RE-READ TIME FROM GRID] but we ask that you arrive at least 15 minutes in advance, so by [READ ARRIVAL TIME FROM GRID] to give you time to get signed in before the group begins. We will have some light refreshments for you as well.

We will send you a confirmation letter along with directions to the facility where the groups will be held. We will also call you a day or two in advance of your scheduled group to remind you and confirm your attendance. I need the following information:

Name: _____

Address: _____

Daytime Phone: _____

Evening Phone: _____

Mobile Phone: _____

E-Mail Address: _____

Part 2: Consumer Focus Groups Screener

Introduction

Hello, my name is _____ and I am calling from [INSERT FACILITY NAME], an independent research firm. We are conducting a series of focus group discussions on behalf of the US Postal Service with people like yourself about some proposed changes to postal services. If LUNCH GROUP TELL THEM LUNCH

Are you the person in your household who is primarily responsible for handling the receipt, sorting, and other tasks related to your household's mail?

- Yes – CONTINUE
 No – Ask to speak to that person – If not available schedule callback

Are you 18 years of age or older?

- Yes – CONTINUE
 No – TERMINATE

Does your household receive mail at your home or through a post office box?

- HOME – CONTINUE
 POST OFFICE BOX – AT LEAST 1 NO MORE THAN 2

We wish to talk with individuals during an informal **two-hour** group discussion. The groups are information-gathering sessions **only**. We are not selling anything. We simply want to know your opinions and I assure you that your individual responses will be kept completely confidential.

The discussion groups are taking place [INSERT DATE FROM GRID BELOW]. You will be given [INSERT INCENTIVE AMOUNT FROM GRID BELOW] in recognition of your participation. In order to confirm your attendance, I need to ask you some questions.

Date	Time	Composition	Location	Incentive
September 2, 2009	5:30 P.M.	Low Income / Center City	Downtown Chicago	\$75.00
September 2, 2009	8:00 P.M.	Moderate Income / Suburban	Downtown Chicago	\$85.00
September 15, 2009	5:30 P.M.	High Income / Center City	Downtown Seattle	\$100.00
September 16, 2009	6:00 P.M.	High Income / Suburban	Kirkland	\$85.00
September 16, 2009	8:00 P.M.	Moderate Income / Rural	Kirkland	\$125.00
September 21, 2009	Noon	High Income / Center City	Manhattan	\$100.00
September 22, 2009	6:00 P.M.	High Income / Suburban	Westchester	\$85.00
September 22, 2009	8:00 P.M.	Moderate Income / Suburban	Westchester	\$75.00
September 23, 2009	5:30 P.M.	Moderate Income / Rural	Atlanta	\$125.00
September 23, 2009	8:00 P.M.	Low Income / Center City	Atlanta	\$75.00

Screener

36. RECORD GENDER BY OBSERVATION. IF UNCERTAIN ASK

<input type="radio"/> FEMALE <input type="radio"/> MALE	RECRUIT MIX
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37. Do you or does anyone in your immediate family work in any of the following industries?

<input type="radio"/> Advertising or Public Relations <input type="radio"/> Market Research <input type="radio"/> US Postal Service <input type="radio"/> UPS <input type="radio"/> Fed Ex <input type="radio"/> Mail or Small Package Delivery Service	TERMINATE
<input type="radio"/> NONE OF THE ABOVE	CONTINUE

38. When was the last time you participated in a focus group discussion?

<input type="radio"/> Within the Last 12 months When was the group? _____ What was the topic of this group? _____	CONTINUE WITH SCREENER; DO NOT RECRUIT; SAVE AS POTENTIAL RECRUIT
<input type="radio"/> Over 12 months ago <input type="radio"/> Never	CONTINUE

39. Which of the following best describes where you live?

<input type="radio"/> Downtown Atlanta <input type="radio"/> Downtown Chicago <input type="radio"/> Downtown Seattle (including Belltown, South Lake Union, International District, Lower Queen) <input type="radio"/> Manhattan	RECRUIT FOR APPROPRIATE CENTER CITY GROUP DEPENDING ON INCOME
<input type="radio"/> Suburban Chicago <input type="radio"/> Suburban New York	RECRUIT FOR APPROPRIATE SUBURBAN GROUP DEPENDING ON INCOME
<input type="radio"/> Rural Atlanta <input type="radio"/> Rural Seattle	RECRUIT FOR APPROPRIATE RURAL GROUP DEPENDING ON INCOME

40. Which of the following broad income categories best describes your total annual household income before taxes?

<input type="radio"/> Less than \$35,000	RECRUIT FOR DT CHICAGO ATLANTA
<input type="radio"/> At least \$35,000 but less than \$50,000 <input type="radio"/> At least \$50,000 but less than \$100,000	RECRUIT FOR APPROPRIATE RURAL (SEATTLE OR ATLANTA) OR SUBURBAN GROUP [DT CHICAGO OR WESTCHESTER]
<input type="radio"/> \$100,000 or more	RECRUIT FOR APPROPRIATE CENTER CITY [SEATTLE / MANHATTAN] OR SUBURBAN GROUPS [KIRKLAND / WESTCHESTER]

41. Which of the following types of mail does your household send or receive using USPS First Class Mail?
[CHECK ALL THAT APPLY]

<input type="radio"/> Bills, Invoices, or Statements <input type="radio"/> Payments <input type="radio"/> Advertising or Marketing Materials (including catalogs) <input type="radio"/> General Correspondence <input type="radio"/> Magazines / Newspapers <input type="radio"/> Greeting / holiday bday cards <input type="radio"/> Other	RECRUIT A MIX
<input type="radio"/> NONE OF THE ABOVE	TERMINATE

42. How often does your household receive packages delivered by USPS at your home?

<input type="radio"/> At least once a month <input type="radio"/> At least once every couple of months <input type="radio"/> At least once a year	MINIMUM OF 5 PER GROUP RECRUIT MIX
<input type="radio"/> Never	NO MORE THAN 5

43. Which of the following broad categories best fits your age?

<input type="radio"/> Less than 18	TERMINATE
<input type="radio"/> 18 to 24 <input type="radio"/> 25 to 34 <input type="radio"/> 35 to 44 <input type="radio"/> 45 to 54 <input type="radio"/> 55 to 64	RECRUIT MIX
<input type="radio"/> 65 and Over	NO MORE THAN 2 PER GROUP

44. Would you describe yourself as . . .[READ CHOICES]

<input type="radio"/> Employed full-time <input type="radio"/> Employed part-time <input type="radio"/> Self-employed / own a business <input type="radio"/> Homemaker <input type="radio"/> Student	RECRUIT A MIX
<input type="radio"/> Not employed at this time but looking for work	LIMIT TO ONE (1) PER GROUP
<input type="radio"/> Retired	NO MORE THAN 2 PER GROUP

45. IF CURRENTLY EMPLOYED: in which industry do you currently work? [RECORD ANSWER]

IF FORMERLY EMPLOYED / RETIRED: In which industry did you formerly work? [RECORD ANSWER]

TERMINATE IF ADVERTISING / PR, MARKET RESEARCH, US POSTAL SERVICE, FED EX, UPS, ANY SMALL PACKAGE / MAILING SERVICE

46. Including yourself, how many adults 18 years of age or older live in your household?

<input type="radio"/> One <input type="radio"/> Two <input type="radio"/> Three or More	RECRUIT A MIX
---	----------------------

47. [IF HOUSEHOLD SIZE > 1] Do you have any children under the age of 18 living at home with you?

<input type="radio"/> Yes <input type="radio"/> No	RECRUIT A MIX
---	----------------------

INVITATION

Thank you for answering these questions. You do qualify to participate in a group scheduled:

- At [READ TIME FROM GRID]
- On [READ DATE FROM GRID]
- At [READ LOCATION FROM GRID]

As we are asking for your time, as a token of our appreciation we are offering to pay you [READ INCENTIVE AMOUNT FROM GRID] **in cash** for your time. If you are available, we would love to have you. This discussion will involve 8 to 10 other people just like yourself and will last about **two hours**. As we are recruiting a limited number of people for the group, we need to be able to rely on your attendance.

Are you available at that time?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

Great. Just to make sure. The group is an open discussion lead by a moderator. There will be 8 to 10 other people in the group. Are you comfortable speaking out in a group setting such as this?

- YES – CONTINUE
- NO – NOT AVAILABLE AT THAT TIME; SAVE

The group will begin at [RE-READ TIME FROM GRID] but we ask that you arrive at least 15 minutes in advance, so by [READ ARRIVAL TIME FROM GRID] to give you time to get signed in before the group begins. We will have some light refreshments for you as well.

We will send you a confirmation letter along with directions to the facility where the groups will be held. We will also call you a day or two in advance of your scheduled group to remind you and confirm your attendance. I need the following information:

Name: _____

Address: _____

Daytime Phone: _____

Evening Phone: _____

Mobile Phone: _____

E-Mail Address: _____

Chicago, Primarily (75% or More) Ship Postal Service

Last Initial	Q1 - Primary mail shipping person	Q2 - Security	Q3 - Type of business (MAX 2 NON-PROFIT)	Q4 - Describe your company (MAX 2 EXCEPT NONE)				Q5 - Number of people (MAX OF 2 FOR 1 EMP)		Q6 - Past participation		Q7 - Types of services used to send/receive										Q8 - Types of mail using USPS First Class										Q9 - Types of mail using USPS Standard	Q10 - How many package ship per week			Q11 - Amount of Shipments through USPS (MAX)			Q12 - How pays for postal Service (MAX)			Q13 - Amount sent/receive in a week (MAX)			Q14 - Amount of mail in a week (MAX)			Q15 - TITLE			
	MUST SAY YES	MUST SAY NONE	SPECIFY	LETTER SHOP	PRINTER	PRESORT BUREAU	MAIL SERVICE PROVIDER	NONE	2<5	5<10	>12 MONTHS	NEVER	FIRST CLASS	STANDARD	EXPRESS	PRIORITY	PARCEL SELECT	PARCEL POST	MEDIA MAIL	FED EX	UPS	OTHER	BILLS/INVOICES or STATEMENTS	PAYMENTS	ADVERTISING OR MARKETING MATERIALS	GENERAL	CUSTOMER NOTIFICATIONS	INVESTOR/SHAREHOLDER MAILINGS	CARDS	OTHER	NONE	MUST SAY NONE	<25	25<65	65+	75%	100%	POSTAGE METER ACCOUNT	PERMIT CORPORATE PC POSTAGE	IMPRINT NONE	<=100	100-250	250-500+	<=25	25-100	100+	CEO	VP FINANCE	VP MARKETING	VP OPERATIONS	MANAGER
PP	yes	none	professional Services				x	2<5	5<10	x		x											x	x	x	x	x				none	<25	25<65	65+	75%	100%	Postage Meter			100 or fewer	n/a				President						
DK	yes	none	Other services				x	5<10		x		x											x	x	x	x				none	<25	25<65	65+	75%	100%	Postage Meter			100-250	n/a				Office Manager							
JK	yes	none	professional Services				x	2<5		x		x											x	x	x	x	x				none	<25	25<65	65+	75%	100%	None			n/a	25-100				Operations Director						
RM	yes	none	Mail Order			x		50<100		x		x	x	x								x								none	25<65	25<65	65+	75%	100%	Postage Meter			100 or fewer					Manager							
DL	yes	none	Wholesale				X	2<5		X		X											x	x	x	x				none	<25	25<65	65+	100%	100%	None			n/a	25-100					CEO						
AK	yes	none	professional Services				x	5<10		x		x	x										x	x	x	x				none	<25	25<65	65+	75%	100%	Postage Meter			100-250	n/a					Office Manager						
LE	yes	none	professional Services				x	20<50		x		x	x	x								x	x	x					Advertising or marketing Materials	<25	25<65	65+	50<75%	75%	100%	None			25-100						CEO						
CC	yes	none	Manufacturing				x	50<100			x	x										x	x	x	x	x	x			none	>65	25<65	65+	75%	100%	PC Postage			n/a	>100					Accounting						
TB	yes	none	Other services				x	2<5		x		x											x	x						none	25<65	25<65	65+	75%	100%	Postage Meter			<100	n/a					Office Manager						
RM	yes	none	Retail				x	10<20		x		x	x									x	x	x					Advertising or marketing Materials	<25	25<65	65+	50<75%	75%	100%	none			25-100						CEO						

Seattle, First Class Mail (Originally Recruited as Standard Mail)

Last Initial	Q1 - Primary mail/shipping person		Q3 - Type of business (MAX 2 NON-PROFIT)	Q4 - Describe your company (MAX 2 EXCEPT NONE)				Q5 - Number of people (MAX) (MAX OF 2 FOR 1 EMP)		Q6 - Past participation		Q7 -Types of services used to send/receive											Q8 -Types of mail using USPS First Class											Q9 Ads and Markings materials via USPS Standard	Q10 - Mags or Newspapers vs USPS Standard			Q11 - How many package ship per week			Q12 - Amount of Shipping through USPS (MAX)			Q13 - How pays for postage (MAX) (DEFERRED ACCOUNT)			Q14 - Amount send/recv in a week (MAX)			Q15 - Amount send/recv in a week (MAX)			Q16 - TITLE		
	MUST SAY YES	MUST SAY NONE		SPECIFY	LETTER SHOP	PRINTER	PRESORT BUREAU	MAIL SERVICE PROVIDER	NONE	1 2-5 10-20 20-50 50-100	>12 MONTHS	NEVER	FIRST CLASS	STANDARD	EXPRESS	PRIORITY	PARCEL SELECT	PARCEL POST	MEDIA MAIL	FED EX	UPS	OTHER	BILLS INVOICES or STATEMENTS	PAYMENTS	ADVERTISING OR MARKETING MATERIALS	GENERAL	CUSTOMER NOTIFICATIONS	INVESTOR/ SHIP ORDER MAILINGS	CARDS	OTHER	NONE	MUST SAY YES	MUST SAY NONE	<25 25-65+ NONE	<10% 25% 25-50% 75%	POSTAGE METER IMPRINT CORPORATE ACCOUNT PC POSTAGE NONE	<=100 100-250 250-500+ NONE	<=25 25-100+ NONE	<=100 100-250 250-500+ NONE	<=25 25-100+ NONE	CEO VP FINANCE MARKETING VP OPERATIONS MANAGER ACCOUNTING	CFO VP													
RY	Yes	None	Other: Construction				x	10-20		x	x	x	x	x		x						x	x	x	x	x				Yes	-	25-65	10-25%	Postage Meter	250-500	-	-	-	Office or Biz Mgr																
TH	Yes	None	Industrial Engineering Products				x	5-10	x			x	x					x	x										Yes	-	<25	<10%	None	-	<25	-	<25	-	CEO / President / Owner																
KR	Yes	None	Human Services				x	20-50		x	x	x					x	x				x	x	x	x				Yes	-	<25	<10%	Postage Meter	100-250	-	-	-	Office or Biz Mgr																	
KM	Yes	None	Retail				x	2-5	x		x	x	x				x	x	x					x	x			Yes	-	25-65	25-50%	Postage Meter	<=100	-	-	-	CEO / President / Owner																		
MS	Yes	None	Professional Services				x	2-5		x	x	x	x				x	x				x						Yes	-	<25	50-75%	None	-	<25	-	<25	-	CEO / President / Owner																	
MS	Yes	None	Professional Services				x	1	x		x	x	x				x	x	x			x	x	x				Yes	-	>25	25-50%	None	-	25-100	-	25-100	-	CEO / President / Owner																	
FD	Yes	None	Retail				x	2-5	x		x	x	x				x	x	x	x		x	x	x				Yes	-	65+	25-50%	Click-n-Ship	>100	-	-	-	CEO / President / Owner																		
VV	Yes	None	Professional Services				x	2-5	x		x	x	x	x			x	x	x			x	x	x				Yes	-	<25	25-50%	Stamps	-	<25	-	<25	-	CEO																	
CS	Yes	None	Professional Services	x				2-5	x		x	x	x				x	x	x			x	x	x				Yes	-	<25	10-25%	PC Postage	-	25-100	-	25-100	-	CEO																	
CY	Yes	None	Design				x	2-5	x		x	x	x				x	x	x			x	x	x				Yes	-	<25	25-50%	Postage Meter, Click-n-Ship	100-250	-	-	-	CEO																		

Seattle, Primarily (75% or More) Ship Postal Service

Last Initial	Q1 - Primary mail/shipping person		Q3 - Type of business (MAX 2 NON-PROFIT)	Q4 - Describe your company (MAX 2 EXCEPT NONE)				Q5 - Number of people (MAX) (MAX OF 2 FOR 1 EMP)		Q6 - Past participation		Q7 -Types of services used to send/receive											Q8 -Types of mail using USPS First Class											Q9 Ads and Markings materials via USPS Standard	Q10 - Mags or Newspapers vs USPS Standard			Q11 - How many package ship per week			Q12 - Amount of Shipping through USPS (MAX)			Q13 - How pays for postage (MAX) (DEFERRED ACCOUNT)			Q14 - Amount send/recv in a week (MAX)			Q15 - Amount send/recv in a week (MAX)			Q16 - TITLE		
	MUST SAY YES	MUST SAY NONE		SPECIFY	LETTER SHOP	PRINTER	PRESORT BUREAU	MAIL SERVICE PROVIDER	NONE	1 2-5 10-20 20-50 50-100	>12 MONTHS	NEVER	FIRST CLASS	STANDARD	EXPRESS	PRIORITY	PARCEL SELECT	PARCEL POST	MEDIA MAIL	FED EX	UPS	OTHER	BILLS INVOICES or STATEMENTS	PAYMENTS	ADVERTISING OR MARKETING MATERIALS	GENERAL	CUSTOMER NOTIFICATIONS	INVESTOR/ SHIP ORDER MAILINGS	CARDS	OTHER	NONE	MUST SAY YES	MUST SAY NONE	<25 25-65+ NONE	<10% 25% 25-50% 75%	POSTAGE METER IMPRINT CORPORATE ACCOUNT PC POSTAGE NONE	<=100 100-250 250-500+ NONE	<=25 25-100+ NONE	<=100 100-250 250-500+ NONE	<=25 25-100+ NONE	CEO VP FINANCE MARKETING VP OPERATIONS MANAGER ACCOUNTING	CFO VP													
IG	Yes	None	Retail				x	2-5		x																				None	<25	75%	Postage Meter	<=100	-	-	-	-	CEO																
NL	Yes	None	Utilities				x	50-100	x		x	x	x	x			x	x	x			x	x							None	25-65	75%	Postage Meter	100-250	-	-	-	-	Office Mgr.																
PL	Yes	None	Not for Profit conferences				x	5-10		x	x	x	x	x								x	x						None	<25	75%	Postage Meter	<100	-	-	-	-	VP/DOO																	
GR	Yes	None	Mfg				x	5-10	x		x											x	x						None	<25	100%	Postage Meter	100-250	-	-	-	-	CEO																	
AX	Yes	None	Mfg				x	10-20		x	x						x	x				x							None	<25	75%	Postage meter	<100	-	-	-	-	Office Mgr.																	
JD	Yes	None	Mfg				x	10-20		x	x											x							None	25-60	75%	PC Postage	-	25-100	-	-	-	Accounting																	
LN	Yes	None	Mfg/Engineering Svcs				x	50-100		x	x	x	x	x			x	x	x			x	x						None	None	25-65	75%	Postage Meter	100-250	-	-	-	-	Other/Admin																
DW	Yes	None	Professional Services				x	1	x		x	x	x				x					x	x	x	x				None	None	<25	75%	Stamps	-	25-100	-	25-100	-	CEO																
MS	Yes	None	Retail				x	1	x		x	x	x				x	x				x	x					None	None	<25	75%	Stamps	-	<25	-	<25	-	CEO																	
MS	Yes	None	Financial				x	2-5	x		x	x	x				x	x	x			x	x	x				None	None	65+	75%+	Postage meter	100-250	-	-	-	-	CEO																	
JH	Yes	None	Construction				x	2-5		3-4 mos	x	x	x	x			x	x	x			x	x					None	< 25	75%	None	-	25-100	-	-	-	Office or Biz Mgr	TMQ: Past Par																	

New York, Shipping Use FedEx and/or UPS and Postal Service

Last Initial	Q1 - Primary mail/shipping person	Q1 - Number of people (MIX) (MAX OF 2 FOR 1 EMP)	Q2 - Security	Q3 - Type of business (MIX) (MAX 2 NON-PROFIT)	Q4 - Describe your company (MAX 2 EXCEPT NONE)				Q5 - Past participation		Q6 - How pays for postal Service (MIX)	Q7 -Types of services used to send/receive (MUST MIX)							Q8 - How many package ship per week (MIX)	Q10 -Amount of Shipping through USPS	Q11 - TITLE				
	MUST SAY YES	1 2<5 5<10 10<20 20<50 50<100	MUST SAY NONE	SPECIFY	LETTER SHOP	PRINTER	PRESORT BUREAU	MAIL SERVICE PROVIDER	NONE	>12 MONTHS	NEVER	POSTAGE METER PERMIT IMPRINT CORPORATE ACCOUNT PC POSTAGE NONE	FIRST CLASS	STANDARD	EXPRESS	PRIORITY	PARCEL SELECT	PARCEL POST	MEDIA MAIL	FED EX	UPS	OTHER	<25 25<65 65+	10% to 75%	CEO VP FINANCE MARKETING OPERATIONS VP MANAGER ACCOUNTING CFO VP
SS	Yes	5<10	None	Professional Services					x	x	None / Stamps	x	x							x	x		25<65	10%-25%	CEO / Pres / Owner
CC	Yes	2<5	None	Retail					x		None / Stamps		x									x	<25	25%-50%	CEO / Pres / Owner
RZ	Yes	2<5	None	Retail					x		None / Stamps		x									x	<25	10%-25%	CEO / Pres / Owner
MP	Yes	2<5	None	Professional Services					x		Stamps / Express Mail Corp Acct	X		X						S	x		25<65	25%-50%	CEO / Pres / Owner
RM	Yes	20<50	None	Professional Services					x	x	None / Stamps									x	x		25<65	10%-25%	CEO / Pres / Owner
CS	Yes	20<50	None	Professional Services					x	x	Postage Meter	x	x	x	x					x	x		<25	10%-25%	CEO / Pres / Owner
B.	Yes	50<100	None	Professional Services					x	x	Postage Meter	x	x	x	x					x	x		25<65	50%-75%	Office / Business Mgr
EV	Yes	20<50	None	Transportation					x	x	Permit Imprint / PC Postage	x	x	x	x					x	x		<25	10%-25%	CEO / Pres / Owner
NL	Yes	20<50	None	Retail					x		Postage Meter	x	x	x	x					x	x		65+	10%-25%	CEO / Pres / Owner
GB	Yes	50<100	None	Financial Services					x	x	Express Mail Corporate Account	x		x	x					x	x		25<65	25%-50%	CEO / Pres / Owner
DW	Yes	50<100	None	Non-profit					x	x	Postage Meter	x	x	x	x					x	x		25<65	50%-75%	Director of Operations

New York, Suburban Business, Standard Mail

Last Initial	Q1 - Primary mail/shipping person	Q1 - Number of people (MAX) (MAX OF 2 FOR 1 EMP)	Q2 - Security	Q3 - Type of business (MIX) (NON-PROFIT)	Q4 - Use Direct Mailing Campaigns	Q4 - Mail 200+ pieces	Q5 - Using Standard Mail	Q6 - Does mailing on own or shared (MIX)	Q7 - Past participation		Q8 - How many for Postal Service (MAX)	Q9 - Types of services used to send/receive (USPS ONLY)										Q10 - TITLE	
	MUST SAY YES	1 2-5 5<10 10-20 20-50 50<100	MUST SAY NONE	SPECIFY	MUST SAY YES	MUST SAY YES	MUST SAY YES	Recruit a mix	>12 MONTHS	NEVER	POSTAGE METER METER PERMIT IMPRINT CORPORATE ACCOUNT PC POSTAGE NONE	FIRST CLASS	STANDARD	EXPRESS	PRIORITY	PARCEL SELECT	PARCEL POST	MEDIA MAIL	FED EX	UPS	OTHER	CEO CFO VP FINANCE VP MARKETING VP OPERATIONS MANAGER ACCOUNTING	
MS	Yes	10-20	None	Retail (Grocery, Cake, Ice Cream)	Yes	Yes	Yes	On own & Shared Mailing	x		PC Postage		x			x							Owner
MT	Yes	20-50	None	Real Estate	Yes	Yes	Yes	On own	x		Permit Imprint	x	x	x	x	x	x	x	x	x		Office Manager	
LB	Yes	2-5	None	Real Estate	Yes	Yes	Yes	On own	x		Express Mail Corporate Account	x	x	x					x	x	Messaging Service	Office Manager	
PH	Yes	2-5	None	Real Estate	Yes	Yes	Yes	On own	x		Postage Meter	x	x	x	x						x	President	
LM	Yes	2-5	None	Retail (Cash Registers, Supplies & Sales)	Yes	Yes	Yes	On own	x		Postage Meter											President	
MC	Yes	5<10	None	Real Estate	Yes	Yes	Yes	On own	x		Express Mail Corporate Account, PC Postage	x	x	x								Regional VP	

Atlanta Shipping Use FedEX and/or UPS and Postal Service

Initials	Primary mail/shipping person	Q1 - Number of people (MIX) (MAX OF 2 FOR 1 EMP)	Q2 - Security	Q3 - Type of business (MIX) (MAX 2 NON-PROFIT)	Q4 - Describe your company (MAX 2 EXCEPT NONE)						Q5 - Past participation		Q6 - How pays for postal Service (MIX)	Q7 -Types of services used to send/receive (MUST USE FEDEX and/or UPS AND USPS) (MIX)								Q8 - How many package ship per week (MIX)	Q10 -Amount of Shipping through USPS	Q15 - TITLE				
	MUST SAY YES	1 2<5 5<10 10<20 20<50 50<100	MUST SAY NONE	SPECIFY	LETTER SHOP	PRINTER	PRESORT BUREAU	MAIL SERVICE PROVIDER	NONE	>12 MONTHS	NEVER	POSTAGE METER ACCOUNT	PERMIT IMPRINT CORPORATE PC POSTAGE NONE	FIRST CLASS	STANDARD	EXPRESS	PRIORITY	PARCEL SELECT	PARCEL POST	MEDIA MAIL	FED EX	UPS	OTHER	<25 25<65 65+	10% to 75%	CEO VP FINANCE MARKETING OPERATIONS MANAGER ACCOUNTING	CFO VP	
PW	Yes	20<50	None	Not for Profit					x	X		Postage Meter,Permit Imprint	x	x	x	x						x	x		25<65	10%-75%	Chief Administrative Officer	
SH	Yes	10<20	None	Retail					x	x		PC Postage	x	x								x	x		25<65	10%-75%	General Manager	
GB	Yes	2<5	None	Other Services					x	x		Postage Meter	x									x	x		<25	25%-50%	CEO/President/Owner	
WMB	Yes	1	None	Professional Services					x	x		PC Postage	x		x		x					x	x		<25	25%-50%	CEO/President/Owner	
TC	Yes	10<20	None	Other Services					x	x		PC Postage			x	x						x	x		<25	25%-50%	CEO/President/Owner	
JC	Yes	5<10	None	Professional Services					x	x		Postage Meter,Express Mail Corporate Account	x	x	x		x					x	x	x	<25	25%-50%	CEO/President/Owner	
AE	Yes	10<20	None	Not for Profit					x		x	Postage Meter,Permit Imprint	x	x	x							x	x		25<65	10%-25%	VP/Director of Finance	
DK	Yes	1	None	Professional Services					x	x		None	x	x		x		x	x	x	x	x	x		<25	25%-50%	CEO/President/Owner	
KH	Yes	5<10	None	Retail					x	x		None	x	x	x	x	x	x	x	x	x	x	x		25<65	10%-25%	CEO/President/Owner	

Atlanta Standard Mail

Initials	Q1 - Primary mail/shipping person	Q1 - Number of people (MIX) (MAX OF 2 FOR 1 EMP)	Q2 - Security	Q3 - Type of business (MIX) (MAX 2 NON-PROFIT)	Q4 - Use Direct Mailing Campaigns	Q4 - Mail 200+ pieces	Q5 - Using Standard Mail	Q6 - Does mailing on own or shared (MIX)	Q7 - Past participation		Q8 - How pays for postal Service (MIX)	Q9 -Types of services used to send/receive (USPS ONLY)										Q10 - TITLE	
	MUST SAY YES	1 2<5 5<10 10<20 20<50 50<100	MUST SAY NONE	SPECIFY	MUST SAY YES	MUST SAY YES	MUST SAY YES	Recruit a mix	12 MONTHS	NEVER	POSTAGE METER PERMIT IMPRINT CORPORATE ACCOUNT PC POSTAGE NONE	FIRST CLASS	STANDARD	EXPRESS	PRIORITY	PARCEL SELECT	PARCEL POST	MEDIA MAIL	FED EX	UPS	OTHER	CEO VP FINANCE MARKETING OPERATIONS MANAGER ACCOUNTING	CFO VP
TB	Yes	50<100	None	Online Retailer	Yes	Yes	Yes	On own/ Part of Shared Mailing	x		Postage Meter, Permit Imprint, Express Mail Corporate Account, PC Postage	x	x	x	x		x	x	x	x			CEO/President/Owner
EH	Yes	5<10	None	Retail,Online Retailer	Yes	Yes	Yes	On Own	x		Permit Imprint	x	x	x	x		x		x	x			CEO/President/Owner
MP	Yes	2<5	None	Restaurant	Yes	Yes	Yes	On Own	x		Postaget Meter	x	x	x	x		x		x	x			CEO/President/Owner
BT	Yes	1	None	Office Park	Yes	Yes	Yes	Part of Shared Mailing	x		Postage Meter		x	x	x		x		x	x			CEO/President/Owner
DM	Yes	10<20	None	Printing	Yes	Yes	Yes	On Own	x		Postage Meter,Permit Imprint	x	x		x				x				CEO/President/Owner
JP	Yes	10<20	None	Residential Maid Services	Yes	Yes	Yes	On own/ Part of Shared Mailing	x		Postage Meter,PC Postage	x	x	x	x		x		x	x			CEO/President/Owner
JB	Yes	2<5	None	Retail	Yes	Yes	Yes	On Own	x		None		x		x								CEO/President/Owner
BR	Yes	2<5	None	Retail	Yes	Yes	Yes	On Own	x		None	x	x	x			x		x	x			CEO/President/Owner
CD	Yes	2<5	None	Beverage Catering	Yes	Yes	Yes	On Own		x	Postage Meter,Express Mail Corporate Account, PC Postage	x	x	x	x		x		x	x			CEO/President/Owner
EB	Yes	5<10	None	Aviation	Yes	Yes	Yes	On Own	x		None	x	x	x	x		x		x	x			CEO/President/Owner

Part 2: Consumer Focus Groups Participant Profiles

Chicago, Low Income Center City

Last Initial	Q1 - Primary mail handler	Q2 - 18 YRS or Older	Q3 - Where receive mail - (RECRUIT 1 BUT <3 WITH PO BOX)	Q4 - Gender (MIX)	Q5 - Security	Q6 - Past participation		Q7-Where you live	Q8-Income	Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)					Q11 - Age (MIX) MAX 2 65+	Q12 - Employed (MIX) (MAX 2 RETIRED)	Q13- Occupation Industry	Q14 - How Many Adults (MIX)	Q15- Children (MIX)
	MUST SAY YES	MUST SAY YES	HOME/PO BOX	MALE or FEMALE	MUST SAY NONE	>12 MONTHS	NEVER	MUST SAY DOWNTOWN CHICAGO	MUST SAY <\$35k	BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 35-44 45-54 55-64 65+	FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	SPECIFY	1 2 3+	YES or NO				
ML	Yes	Yes	Home	Female	None	X		Downtown Chicago	<\$35k	X	X	X	X	X	X	X					25-34	Self	Architecture	1	n/a				
MF	Yes	Yes	Home	Female	None	X		Downtown Chicago	<\$35k	X	X	X	X	X	X			X			35-44	Not Emp	Real estate	2	No				
AJ	Yes	Yes	Home	Female	None	X		Downtown Chicago	<\$35k	X	X	X	X	X	X		X				35-44	Homemaker		3+	Yes				
SH	Yes	Yes	Home	Female	None			Downtown Chicago	<\$35k	X	X	X	X	X	X			X			18-24	Student		1	No				
RB	Yes	Yes	Home	Male	None	x		Downtown Chicago	<\$35k	x	x	x	x	x	x		x				25-34	Full	Food Service	3+	No				
VR	Yes	Yes	Home	Female	None		x	Downtown Chicago	<\$35k	x	x	x	x	x	x			x			45-54	Part	Housekeeper	2	No				
AT	Yes	Yes	Home	Male	None	x		Downtown Chicago	<\$35k	x	x	x	x	x	x		x				35-44	Self	Janitorial	3+	Yes				
SJ	Yes	Yes	Home	Female	None	x		Downtown Chicago	<\$35k	x	x	x	x	x	x		x				45-54	Homemaker	N/A	2	No				
DR	Yes	Yes	Home	Male	None		x	Downtown Chicago	<\$35k	x	x	x	x	x	x			x			18-24	Student	N/A	2	No				
BT	Yes	Yes	Home	Male	None	x		Downtown Chicago	<\$35k	x	x	x	x	x	x		x				35-44	Full	Hospitality	1	No				

Chicago, Moderate Income Suburban

Last Initial	Q1 - Primary mail handler	Q2 - 18 YRS or Older	Q3 - Where receive mail (RECRUIT 1 BUT <3 WITH PO BOX)	Q4 - Gender (MIX)	Q5 - Security	Q6 - Past participation		Q7-Where you live	Q8-Income	Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)					Q11 - Age (MIX) MAX 2 65+	Q12 - Employed (MIX) (MAX 2 RETIRED)	Q13- Occupation Industry	Q14 - How Many Adults (MIX)	Q15- Children (MIX)
	MUST SAY YES	MUST SAY YES	HOME/PO BOX	MALE or FEMALE	MUST SAY NONE	>12 MONTHS	NEVER	MUST SAY SUBURBAN CHICAGO	MUST SAY 35K to 100K	BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 45-54 64	25-35-44 55-65+	FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	SPECIFY	1 2 3+	YES or NO			
SP	Yes	Yes	Home	Female	None	X		Suburban Chicago	\$50-\$100k	X	X	X	X	X	X		X					55-64	Part	Healthcare	3+	No			
CB	Yes	Yes	Home	Female	None	X		Suburban Chicago	\$35-\$50k	X	X	X	X	X	X		X					45-54	Self	Jewelry Design	1	No			
TG	Yes	Yes	Home	Female	None		X	Suburban Chicago	\$50-\$100k	X	X	X	X	X	X		X					55-64	Not Emp	N/A	3+	No			
NE	Yes	Yes	Home	Male	None	X		Suburban Chicago	\$50-\$100k	X	X	X	X	X	X		X					25-34	Full	Engineer	1	No			
SN	Yes	Yes	Home	Female	None	X		Suburban Chicago	\$50-\$100k	X	X	X	X	X	X				X			55-64	Retired	Environmental	1	No			
TF	Yes	Yes	Home	Male	None	X		Suburban Chicago	\$50-\$100k	X	X	X	X	X	X		X					45-54	Full	Commodities Trader	3+	Yes			
OL	Yes	Yes	Home	Female	None	x		Suburban Chicago	\$35-\$50k	x	x		x	x	x		x					25-34	Full	Retail	2	Yes			
RD	Yes	Yes	Home	Male	None	x		Suburban Chicago	\$50-\$100k	x	x	x	x	x	x		x					35-44	Full	Adhesives	3+	Yes			
CC	Yes	Yes	Home	Male	None	X		Suburban Chicago	\$35-\$50k	X	X	X	X	X	X		X					25-34	Full	Retail	1	No			
CG	Yes	Yes	Home	Male	None	x		Suburban Chicago	\$50-\$100k	x	x	x	x	x	x			x				45-54	Full	Government	2	No			

Seattle, High Income Center City

Last Initial	Q1 - Primary mail handler	Q2 - 18 YRS or Older	Q3 - Where receive mail (RECRUIT 1 BUT <3 WITH PO BOX)	Q4 - Gender (MIX)	Q5 - Security	Q6 - Past participation		Q7-Where you live	Q8-Income	Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)					Q11 - Age (MIX) (MAX 2 65+)	Q12 - Employed (MIX) (MAX 2 RETIRED) (MAX 1 UNEEMP)	Q13 - Occupation industry	Q14 - How Many Adults (MIX)	Q15 - Children (MIX)
	MUST SAY YES	MUST SAY YES	HOME/PO BOX	MALE or FEMALE	MUST SAY NONE	>12 MONTHS	NEVER	MUST SAY DOWNTOWN SEATTLE (Including Belltown, South Lake Union, Intl Dist, Lower Queen)	MUST SAY 100K+	BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 45-54 64	25- 35-44 55- 65+	FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	SPECIFY	1 2 3+	YES or NO			
PA	Yes	Yes	Home	Male	None	x		Downtown Seattle	\$100k+	x	x	x	x	x	x	x					25-34		FT	Information Technology	2	NO			
LF	Yes	Yes	Home	Female	None	x		Downtown Seattle	\$100k+	x		x	x		x	x		x			35-44		PT	Hospitality	3+	No			
CP	Yes	Yes	Home	Female	None	x		Downtown Seattle	\$100k+	x	x	x	x	x	x		x				35-44		FT	IT	2	No			
BW	Yes	Yes	HOME/PO BOX	Male	None	x		Downtown Seattle	\$100k+	x	x	x	x	x	x		x				55-64		SE	Career Consulting	2	No			
JH	Yes	Yes	Home	Female	None	x		Downtown Seattle	\$100k+	x	x	x	x	x	x		x				55-64		PT	Government	2	No			
ML	Yes	Yes	Home	Female	None		x	Downtown Seattle	\$100k+	x	x	x	x	x	x		x				25-34		SE	Cosmetics Sales	2	No			
JB	Yes	Yes	Home	Female	None	x		Downtown Seattle	\$100k+	x	x	x	x	x	x		x				25-34		FT	Software sales	2	Yes			
CJ	Yes	Yes	Home	Female	None	x		Downtown Seattle	\$100k+	x	x	x	x	x	x		x				25-34		SE	Healthcare	1	NO			
ML	Yes	Yes	Home	Male	None	x		Downtown Seattle	\$100k+	x	x	x	x	x	x		x				25-34		FT	Phone Sales/Contractor	2	No			

Seattle, Moderate Income Rural

Last Initial	Q1 - Primary mail handler MUST SAY YES	Q2 - 18 YRS or Older MUST SAY YES	Q3 - Where receive mail (RECRUIT 1 BUT <3 WITH PO BOX) HOME/PO BOX	Q4 - Gender (MIX) MALE or FEMALE	Q5 - Security MUST SAY NONE	Q6 - Past participation		Q7-Where you live RURAL SEATTLE	Q8-Income MUST SAY \$50-\$100k	Q9 - Send or Receive using USPS First Class Mail (MIX)							Q10 - Receive packages from USPS (MIX)					Q11 - Age (MIX) MAX 2 65+	Q12 - Employed (MIX) (MAX 2 RETIRED) FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	Q13- Occupation Industry SPECIFY	Q14 - How Many Adults (MIX) 1 2 3+	Q15- Children (MIX) YES or NO
						>12 MONTHS	NEVER			BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 45-54 64					
RH	Yes	Yes	Home	Male	None	x		Rural	\$50-\$100k	x	x		x	x	x		x				55-64	Not Emp	-	2	No	
SH	Yes	Yes	Home	Male	None		x	Rural	\$35-\$50k	x	x	x	x	x	x		x				55-64	Self	Construction	2	No	
KE	Yes	Yes	Home	Male	None	x		Rural	\$50-\$100k	x	x	x	x	x	x		x				55-64	Self	Biz Consulting	2	No	
SP	Yes	Yes	Home	Female	None	x		Rural	\$50-\$100k	x	x	x	x	x			x				35-44	PT	Education	3+	Yes	
LR	Yes	Yes	Home	Female	None	x		Rural	\$35-\$50k	x	x	x	x	x			x				35-44	Self	Healthcare	3+	No	
DG	Yes	Yes	Home	Female	None	x		Rural	\$35-\$50	x	x	x	x	x			x				25-34	FT	Construction	3+	No	
JR	Yes	Yes	Home	Female	None	x		Rural	\$35-\$50k	x		x	x	x							25-34	FT	Emergency Communications	1	No	
KW	Yes	Yes	Home	Female	None	x		Rural	\$35-\$50k	x	x	x	x	x			x				55-64	FT	Higher Education	1	No	
MK	Yes	Yes	Home	Male	None	x		Rural	\$50-\$100k	x	x	x	x	x			x				35-44	FT	Telecomm	3+	No	
JG	Yes	Yes	Home	Male	None	x		Rural	\$50-\$100k	x	x	x	x	x			x				45-54	Ft	Aerospace	3+	Yes	
GB	Yes	Yes	Home	Female	None	x		Rural	\$50-\$100k	x	x	x	x	x			x				35-44	FT	Healthcare	3+	yes	

Seattle, High Income Suburban

Last Initial	Q1 - Primary mail handler	Q2 - 18 YRS or Older	Q3 - Where receive mail (RECRUIT 1 BUT <3 WITH PO BOX)	Q4 - Gender (MIX)	Q5 - Security	Q6 - Past participation		Q7 - Where you live	Q8 - Income	Q9 - Send or Receive using USPS First Class Mail (MIX)							Q10 - Receive packages from USPS (MIX)				Q11 - Age (MIX) MAX 2 65+	Q12 - Employed (MIX) (MAX 2 RETIRED)	Q13 - Occupation Industry	Q14 - How Many in HH (MIX)	Q15 - Children (MIX)
	MUST SAY YES	MUST SAY YES	HOME/PO BOX	MALE or FEMALE	MUST SAY NONE	>12 MONTHS	NEVER	MUST SAY SUBURBAN SEATTLE	MUST SAY 100K+	BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 45-54 64	25-44 55-65+	FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	SPECIFY	1 2 3+
JK	Yes	Yes	Home	Female	None	x		Suburban Seattle	\$100k+	x	x	x	x	x	x				x		45-54	FT	Financial	1	No
GC	Yes	Yes	home	Female	None	x		Suburban Seattle	\$100k+	x	x	x	x	x	x	x					25-34	FT	Software	2	No
HB	Yes	Yes	Home	Female	None	x		Suburban Seattle	\$100k+	x	x	x	x	x	x		x				35-44	FT	Healthcare	3+	Yes
AD	Yes	Yes	Home	Female	None	x		Suburban Seattle	\$100k+	x	x	x	x	x	x	x					35-44	PT	Retail	2	No
SD	Yes	Yes	Home	Female	None	x		Suburban Seattle	\$100k+	x	x		x	x	x	x					55-64	FT	Serv Rep	3+	No
JL	Yes	Yes	Home	Female	None	x		Suburban Seattle	\$100k+	x	x	x	x	x	x				x		35-44	Homemaker	-	3+	Yes
PN	Yes	Yes	Home	Male	None	x		Suburban Seattle	\$100k+	x	x	x	x	x	x	x					55-64	FT	Government	3+	No
KC	Yes	Yes	Home	Male	None	x		Suburban Seattle	\$100k+	x		x	x	x	x			x			55-64	FT	Real Estate	2	No
BS	Yes	Yes	Home	Male	None		x	Suburban Seattle	\$100k+	x	x		x	x	x		x				55-64	FT	Financial	3+	No
CK	Yes	Yes	Home	Female	None	x		Suburban Seattle	\$100k+	x	x	x	x	x	x		x				25-34	FT	Technology	3+	Yes

New York, High Income Center City

Initials	MUST SAY YES	MUST SAY YES	HOME/PO BOX	MALE or FEMALE	MUST SAY NONE	Q6 - Past participation		Q7-Where you live	Q8-Income	Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)					Q11 - Age (MIX) (MAX 2 65+)		Q12 - Employed (MIX) (MAX 2 RETIRED) (MAX 1 UNEEMP)		Q13- Occupation Industry	Q14 - How Many Adults (MIX)	Q15- Children (MIX)
						>12 MONTHS	NEVER			MANHATTAN	MUST SAY 100k+	BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34-44 45-54 55-64 65+	25-34 35-44	FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	SPECIFY	1 2 3+	YES or NO			
MA	Yes	Yes	Home	Male	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x		x									35-44	Self-Employed	Consultant Recruiter	2	Yes	
DL	Yes	Yes	Home	Male	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x	x	x									25-34	FT	Information Technology	2	No	
RR	Yes	Yes	Home	Female	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x		x								45-54	FT	Medical Transcriber	3+	No		
MF	Yes	Yes	Home	Female	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x			x							55-64	FT	Interior Design	1	No		
AS	Yes	Yes	Home	Male	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x		x								25-34	FT	Equity COO / Finance	2	No		
KD	Yes	Yes	Home	Female	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x		x								18-24	PT	Arts	2	No		
LK	Yes	Yes	Home	Male	None		X	MANHATTAN	\$100k+	x	x	x	x	x			x								35-44	FT	Actor	2	No		
AS	Yes	Yes	Home	Female	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x		x								55-64	Self-Employed	Luggage Merchandise	2	No		
GK	Yes	Yes	Home	Female	None	X		MANHATTAN	\$100k+	x	x	x	x	x	x			x							45-54	Homemaker	skip	2	Yes		
AJ	Yes	Yes	PO Box	Female	None		X	MANHATTAN	\$100k+	x	x	x	x	x	x			x							35-44	FT	Director / Education	3+	No		
MR	Yes	Yes	Home	Male	None		X	MANHATTAN	\$100k+	x	x		x	x	x		x								55-64	FT	Carpenter	2	No		

New York, High Income Suburban

Last Initial	Q1 - Primary mail handler		Q2 - 18 YRS or Older		Q3 - Where receive mail (RECRUIT 1 BUT <3 WITH PO BOX)		Q4 - Gender (MIX)		Q5 - Security		Q6 - Past participation		Q7 - Where you live		Q8 - Income		Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)				Q11 - Age (MIX) MAX 2 65+		Q12 - Employed (MIX) (MAX 2 RETIRED)		Q13 - Occupation Industry		Q14 - How Many Adults (MIX)		Q15 - Children (MIX)	
	MUST SAY YES	MUST SAY YES	HOME/PO BOX	MALE or FEMALE	MUST SAY NONE	>12 MONTHS	NEVER	MUST SAY SUBURBAN NEW YORK	MUST SAY 100K+	BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 45-54 64	25-34 35-44 55-64 65+	FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	SPECIFY	1 2 3+	YES or NO														
LB	Yes	Yes	Home	Female	None	x	Suburban New York	\$100k+	x	x	x	x	x	x	x (Pacakges)	x					25-34	Homemaker	Financial Industry	2	Yes															
RH	Yes	Yes	Home	Female	None		Suburban New York	\$100k+	x	x			x				x				25-34	Full	Education	3+	No															
JM	Yes	Yes	Home	Female	None	x	Suburban New York	\$100k+	x	x	x	x	x	x	x (Pacakges)		x				55-64	Full	Substitute Teacher	2	No															
SG	Yes	Yes	Home, PO Box	Male	None	x	Suburban New York	\$100k+	x	x	x	x	x	x		x					45-54	FT	Sales/Computer software	2	Yes															
JM	Yes	Yes	Home	Male	None		Suburban New York	\$100k+	x	x	x	x	x	x			x				25-34	FT	Law Enforcement	3+	No															
IQ	Yes	Yes	Home	Female	None	x	Suburban New York	\$100k+	x	x	x	x	x	x		x					55-64	FT	Disability care taker/Administrator	3+	No															
ED	Yes	Yes	Home	Female	None	x	Suburban New York	\$100k+	x	x	x	x	x	x		x					55-64	FT	Teacher/Education	1	No															
DC	Yes	Yes	Home	Female	None	x	Suburban New York	\$100k+	x	x	x	x	x	x		x					45-54	FT	Heathcare	2	Yes															
GH	Yes	Yes	Home	Female	None	x	Suburban New York	\$100k+	x	x	x	x	x	x		x					45-54	FT	Business Intelligence/Sony	1	No															

New York, Moderate Income Suburban

Initials	Q1 - Primary mail handler MUST SAY YES	Q2 - 18 YRS or Older MUST SAY YES	Q3 - Where receive mail - (RECRUIT 1 BUT <3 WITH PO BOX) HOME/PO BOX	Q4 - Gender (MIX) MALE or FEMALE	Q5 - Security MUST SAY NONE	Q6 - Past participation		Q7 - Where you live MUST SAY SUBURBAN NEW YORK	Q8 - Income MUST SAY 35K to 100K	Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)					Q11 - Age (MIX) (MAX 2 65+)	Q12 - Employed (MIX) (MAX 2 RETIRED) FULL PART SELF STUDENT NOT EMP RETIRED	Q13 - Occupation Industry SPECIFY	Q14 - How Many Adults (MIX) 1 2 3+	Q15 - Children (MIX) YES or NO
						>12 MONTHS	NEVER			BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 45-54 64	25- 35-44 55- 65+							
RR	Yes	Yes	Home	Male	None	x		Suburban New York	\$50-100k	x	x	x	x	x	x		x							45-54	Full	Lawyer	2	No	
CJ	Yes	Yes	Home	Female	None		x	Suburban New York	\$50-100k	x	x	x	x	x	x		x							25-34	Full	Teacher	2	Yes	
CP	Yes	Yes	Home	Female	None	x		Suburban New York	\$50-100k	x	x	x	x	x	x			x						55-64	Self	Dry cleaner/Owner	1	No	
ML	Yes	Yes	Home	Male	None		x	Suburban New York	\$50-100k	x	x	x	x	x	x		x							18-24	Not Emp	n/a	3+	No	
DG	Yes	Yes	Home	Female	None	x		Suburban New York	\$50-100k	x	x	x	x	x	x			x						45-54	Part	Usher/County Center	1	No	
TB	Yes	Yes	Home	Male	None	x		Suburban New York	\$50-100k	x	x	x	x	x	x		x							35-44	Part	Telecommunication	2	Yes	
AC	Yes	Yes	Home	Male	None	x		Suburban New York	\$50-100k	x	x	x	x	x	x		x							55-64	FT	Management consulting	2	No	
SB	Yes	Yes	Home	Female	None	x		Suburban New York	\$50-100k	x	x	x		x	x		x							45-54	Part	Sales/Lord & Taylors	3+		

Atlanta, Center City Low Income

Initials	Q1 - Primary mail handler MUST SAY YES	Q2 - 18 YRS or Older MUST SAY YES	Q3 - Where receive mail - (RECRUIT 1 BUT <3 WITH PO BOX) HOME/PO BOX	Q4 - Gender (MIX) MALE or FEMALE	Q5 - Security MUST SAY NONE	Q6 - Past participation		Q7 - Where you live MUST SAY DOWNTOWN ATLANTA	Q8 - Income MUST SAY <35K	Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)					Q11 - Age (MIX) (MAX 2 65+)	Q12 - Employed (MIX) (MAX 1 UNEMP) FULL PART SELF STUDENT NOT EMP RETIRED	Q13 - Occupation Industry SPECIFY	Q14 - How Many Adults (MIX) 1 2 3+	Q15 - Children (MIX) YES or NO
						>12 MONTHS	NEVER			BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 45-54 64	25- 35-44 55- 65+							
CM	Yes	Yes	Home	Male	None	x		Downtown	<35k	x	x	x	x	x	x			x						55-64	Retired	Accounting, Credit & Collections	2	No	
CW	Yes	Yes	Home	Female	None	x		Downtown	<35k	x	x	x	x	x	x		x							35-44	Full	Customer Service	3+	Yes	
GB	Yes	Yes	Home	Female	None	x		Downtown	<35k	x	x	x	x	x	x		x							55-64	Full	Education	2	No	
JG	Yes	Yes	Home	Male	None		x	Downtown	<35k	x	x	x					x							25-34	Part	Research Assistant	2	No	
HR	Yes	Yes	Home	Female	None	x		Downtown	<35k	x	x	x	x	x	x		x							18-24	PT	car dealership	2	Yes	
RR	Yes	Yes	Home	Male	None	x		Downtown	<35k	x	x		x	x	x		x							35-44	FT	I.T	1	No	

Atlanta, Moderate Income Rural

Last Initial	Q1 - Primary mail handler	Q2 - 18 YRS or Older	Q3 - Where receive mail (RECRUIT 1 BUT <3 WITH PO BOX)	Q4 - Gender (MIX)	Q5 - Security	Q6 - Past participation		Q7-Where you live	Q8-Income	Q9 - Send or Receive using USPS First Class Mail (MIX)										Q10 - Receive packages from USPS (MIX)				Q11 - Age (MIX) MAX 2 65+	Q12 - Employed (MIX) (MAX 2 RETIRED) (MAX 1 UNEMPLOYED)	Q13 - Occupation Industry	Q14 - How Many Adults (MIX)	Q15 - Children (MIX)
	MUST SAY YES	MUST SAY YES	HOME/PO BOX	MALE or FEMALE	MUST SAY NONE	>12 MONTHS	NEVER	MUST SAY RURAL ATLANTA	MUST SAY 35K to 100K	BILLS, INVOICES, or STATEMENTS	PAYMENTS	ADVERTISING or MARKETING	GENERAL	MAGAZINES / NEWSPAPERS	GREETING / HOLIDAY B-DAY CARDS	OTHER	ONCE PER MONTH	ONCE EVERY COUPLE MONTHS	AT LEAST ONCE PER YEAR	NEVER (MAX 5)	18-24 34 35-44 45-54 55-64 65+	FULL PART SELF HOMEMAKER STUDENT NOT EMP RETIRED	SPECIFY	1 2 3+	YES or NO			
KR	Yes	Yes	Home	Male	None	x		Rural	50k-100k			x		x	x			x			35-44	Full	Copy Service	3+	Yes			
EL	Yes	Yes	Post	Female	None	x		Rural	50k-100k	x	x	x	x	x	x		x				45-54	Part	Real Estate	2	No			
TA	Yes	Yes	Home	Male	None	x		Rural	50k-100k	x	x		x	x	x		x				45-54	Full	Computer /IT	3+	No			
DW	Yes	Yes	Home	Female	None	x		Rural	35k-50k	x	x	x	x	x	x			x			45-54	Self	Real Estate	3+	Yes			
GW	Yes	Yes	Home	Female	None	x		Rural	50k-100k	x	x	x	x	x	x		x				55-64	Full	Education	2	No			
BP	Yes	Yes	Home	Male	None	x		Rural	50k-100k	x	x	x	x					x			45-54	Retired	Transportation	2	No			
AJ	Yes	Yes	Home	Female	None	x		Rural	50k-100k	x		x	x	x	x		x				25-34	Homemaker	n/a	3+	Yes			
NC	Yes	Yes	Home	Female	None	x		Rural	50k-100k	x		x	x	x	x		x				45-54	Homemaker	School	3+	Yes			
RS	Yes	Yes	Home	Male	None	x		Rural	50k-100k	x		x	x	x	x			x			55-64	Self	Transportation	2	No			
BW	Yes	Yes	Home	Female	None	x		Rural	50k-100k	x		x	x	x	x		x				55-64	Full	Telecommunication	3+	No			

Appendix C: Moderator's Guides

Part 1: Business Groups Moderator's Guide

*Moderator's Guide
Postal Service Five-Day Delivery
Business Groups*

Objectives

- Develop a deep understanding of the various ways of the impact of the proposed five-day delivery schedule would have on consumers and businesses and the ways in which they are likely to respond to a switch to five day a week delivery (e.g., adjust their mailing programs, switch to competitors, move to online bill payment, etc.).
- Understand why businesses and consumers would respond that way.
- Assess how difficult it will be for businesses and consumers to adjust and why. Discuss what issues/problems they will have.
- Assess perceptions of Postal Service's reasons for the change.
- Identify / test strategies by which Postal Service could mitigate the impact of this change in service on consumers and businesses.

Introductions & Instructions

10 minutes

Purpose Of Focus Group

- Opinions / how feel and why.
- No right or wrong answers.
- Expect agreement / disagreement
- Encourage synergism / talk one at a time
- Recruiting process / source of list / you represent audience
- How results will be used
- Tape / others watching
- Privacy protection / our obligations

Business Introductions(s) – Name, company, position in company, industry type, hours of operation, who are your customers – other businesses or consumers

Current Behaviors

20 minutes

Let's start by how you / your business uses USPS services.

- How important is mail to running your business? How is it important to your business?
- What does your business do by mail or rely on the mail to do?
 - Financial transactions

- General correspondence with customers, clients, etc.
- Notices / statements
- Advertising
- Package shipments
- Magazines
- Catalogs
- Think about a typical week at work and describe your mail routine – think about both sending and receiving mail – walk through a typical week by day. Are there certain days of the week you do more or less in regards to handling mail at your business?
 - Think specifically about sending out invoices – What is your routine? What is your degree of flexibility here?
 - Think specifically about when you pay bills – What is your routine? What is your degree of flexibility here?
 - Think specifically about when you receive payments – What is your routine? How sensitive is your business to the timing of receipt of payments – what is the timing that you generally expect from the time you send an invoice to the time you receive payment? What’s the impact / how sensitive is your business if a payment is late by say a day?
 - Think specifically about shipping packages – How many / how often do you send a week. What are they generally for? What’s your routine? How sensitive is your business to receipt of packages as scheduled? What impact if it is late by say a day?
 - Think specifically about receiving packages – How many / often do you get packages. What are they generally for? How critical is it that the packages you receive come within the time you expected? What is impact if it is late by a day?
 - Think specifically about your business’ general correspondence – What is the nature of it and how is it handled? What’s typical?
 - Does your company do any advertising or communicating with customers by mail? If so what, how often, when? When you advertise do you have an objective of what day of the week it needs to be delivered?
- How have these routines changed over the past few years?
 - Invoicing
 - Paying bills
 - Shipping packages
 - General correspondence
 - Advertising / communicating with customers

Attitudes toward Postal Service

10 minutes

- What do you currently think about / feel about the level and quality of services you currently receive from the Postal Service? What works particularly well for your business – notably in terms of the types of “mail moments” we just finished talking about?
- When you send a letter / bill / check / etc. or when someone tells you they have sent you a letter / bill / check / etc. using first class mail – what do you plan for / expect in terms of the number of days it takes from when you send / it is sent until receipt for:
 - Local / intercity / metro market mail
 - To another major metro market across the country
 - All other locations in the United States
- What key aspects of Postal Service services do you really value – i.e., what is really important to you?
- What aspects of Postal Service services do you feel are very important – i.e., you would have major problems without them?

Current Situation

30 minutes

The situation today: As a result of the current recession, huge volume and revenue declines, and a legal requirement to annually prepay over \$5 billion in retiree health benefits, the Postal Service is facing a massive deficit of \$7 billion this year. And, it will face a similar deficit next year.

- If you were the CEO of the Postal Service what do you think would be the best ways for the Postal Service to address this deficit?
 - What changes in services would you suggest? What other changes do you think you would recommend?
- Now put your business hat back on. What changes are you willing as a business to accept to help the USPS address this deficit? Would you rather the Postal Service makes service changes or raise prices significantly – 10 percent across the board – to eliminate this deficit?

Let’s consider one scenario that is being considered. Federal law has required that mail be picked up and delivered six days a week since 1983. The Postal Service has asked Congress earlier this year to approve a reduction in service to five days a week.

- What is your immediate reaction to this proposal?
- What are its advantages / disadvantages?
- What are your immediate questions / concerns regarding this proposal?
- What would be the impacts of this change on your business – financial, logistical, operations, etc.
- Thinking back to the routines you described earlier, what changes to these routines would you have to make? How difficult would it be for your business to make those changes and why?
- How do you think your business would adjust? What changes would you make in use of postal services?

Hand out concept statement (Appendix D, Part 1) and have them discuss:

- What are your immediate reactions – overall.
 - What is your immediate reaction to this proposal?

- What are your immediate questions / concerns regarding this proposal?
- How would this impact your business?
- How would this impact how you use postal services?
- Each bullet point
 - What is your immediate reaction to this proposal?
 - What are your immediate questions / concerns regarding this proposal?
 - How would this impact your business?
 - How would this impact how you use postal services?
- How would these changes impact what you think about the level and value of services offered by the Postal Service?
 - Specifically, how would you expect this change to impact the way you think about the amount of in-transit time for
 - Local / intercity / metro market mail
 - To another major metro market across the country
 - All other locations in the United States

Now given what we have been discussing, what do you feel the Postal Service should do (written / discuss)?

If these were the only two options to reduce the deficit the USPS is facing which would you choose?											
Strongly Choose 5-day week service delivery										Strongly Choose 10 percent across-the-board rate increase	
○	○	○	○	○	○	○	○	○	○	○	○

Mitigation

30 minutes

Are there specific times of the year / month or are there specific situations where five-day per week delivery would have a greater / more negative impact on your business?

- Describe specifically.
- How could these impacts be minimized? What could you do differently? What could the Postal Service do to minimize these impacts?

Here are some things the Post Office is considering to help minimize these impacts. How will these affect you and would they make it easier for you to adapt to five-day delivery?

- Collection of mail on Saturday
What would be your expectation of delivery of such mail?
- Delivery of Priority Mail on Saturday? With a surcharge?
- Delivery of packages the two or three Saturdays before Christmas
- Delivery and collection of mail on Saturday when there is a three day holiday – i.e., Monday or Friday is a holiday

- How likely would you be / what do you think about the idea of obtaining / paying for a PO Box to get Saturday delivery?

If they did some of the things we just discussed, what do you feel the Postal Service should do (written / discuss)? [Written exercise document shown in Appendix D, Part 2]

Of these strategies we just discussed, what would you really want to have the USPS do to make it easier for you to accept five day a week mail delivery?

What is the most effective way to communicate with you regarding changes in postal services? So what if we tell you this? Hand out sheet. [Written document distributed in groups shown in Appendix D, Part 3]

Wrap-Up Attitudes toward USPS

10 minutes

- After all of this discussion – If the Postal Service implements five-day delivery, how will this affect your thoughts about the level and quality of services you currently receive from USPS?

I'd like to have you do one more thing for me. Think about everything we have talked about here and take a minute to write down an answer to this question.

- If you were to write a letter about your feelings regarding this proposed change, who would you write it to and what would you say? [Written exercise document shown in Appendix D, Part 2]

Additional questions from back room.

Part 2: Consumer Groups Moderator's Guide

Moderator's Guide Postal Service Five-Day Delivery Consumer Groups

Objectives

- Develop a deep understanding of the various ways of the impact of the proposed five-day delivery schedule would have on consumers and businesses and the ways in which they are likely to respond to a switch to five day a week delivery (e.g., adjust their mailing programs, switch to competitors, move to online bill payment, etc.).
- Understand why businesses and consumers would respond that way.
- Assess how difficult it will be for businesses and consumers to adjust and why. Discuss what issues/problems they will have.
- Assess perceptions of Postal Service's reasons for the change.
- Identify / test strategies by which Postal Service could mitigate the impact of this change in service on consumers and businesses.

Introductions & Instructions

10 minutes

Purpose of Focus Group

- Opinions / how feel and why.
- No right or wrong answers.
- Expect agreement / disagreement
- Encourage synergism / talk one at a time
- Recruiting process / source of list / you represent audience
- How results will be used
- Tape / others watching
- Privacy protection

Personal Introduction(s) – Name, occupation, where live in [city], how long, etc.

Current Behaviors

20 minutes

Let's start by how you use Postal Service services.

- What do you use the Postal Service for?
 - How much mail does your household send and receive in a typical week? What days of the week do you receive more or less mail?
 - How important are mail and delivery services to you in your daily lives? What times of the year, days of the week are mail delivery and collection services more or less important to you?
 - What do you do by mail or rely on the mail to do?

- How has your use the mail to send and receive changed over recent (past 5) years?
- Think about a typical **week** in your life and let's talk about the things that you do and how you use mail, package, and shipping services to do these things. We are going to talk about six general areas:
 - Your household's financial transactions
 - Your general correspondence – e.g., sending / receiving cards, letters, etc.
 - Express or Priority Mail
 - Your use of advertising / catalogs / direct mail / coupon
 - Packages you send and/or receive
 - Magazines you receive

Describe in detail – What **financial transactions** do you do using the Postal Service (e.g., receiving bills / bank statements / etc. sending payments / etc.)? What is your typical routine? When do you sit down and pay your bills – e.g., do you do it on a specific day (which one), at specific times, of the month, etc.? What factors into the timing of when you sit down and pay bills? When do you mail the payments? How much of your financial transactions do you do using the Postal Service versus other methods (e.g., on-line, in-person, auto withdrawal)? How has this changed during the past five years – i.e., do you do more or less using the Postal Service? When, how, and why? What factors into your decisions on how whether to use the Postal Service versus other methods when paying bills?

Do you receive any checks in the mail at homes? How many and what are they for? When do you typically receive these checks? What do you do after you receive them? Do these checks come specific days of the week / month / year? How important is it that these checks arrive on these specific days of the week / month / year? What is impact if arrival dates change / vary?

What types of **general correspondence** do you send / receive at your home? How much, how often? When? What is your typical routine in handling the general correspondence you send / receive? When you send how much do you send from your home mailbox versus drop at a post office or other mail collection sites? When do you mail general correspondence – greeting cards, invitations, etc. Do you do more at certain times of the year – which times? How has this changed during the past five years– i.e., do you do more or less using the Postal Service? When, how, and why? What factors into your decisions on how whether to use the Postal Service versus other methods to correspond with friends / family?

How often does your household receive something by Express Mail **and Priority Mail**? What is the nature of these items? How often and when do you send things by Express Mail? What types of things do you send by Express Mail and why? How often and when do you send things by Express Mail? What types of things do you send by Priority mail and why? **What is your expectation of** when they will be delivered? How has this changed during the past five years – i.e., do you do more or less using USPS? When, how, and why?

What types of **advertising** do you typically receive at your home – e.g., catalogs, **flyers**, coupons, etc.? How much do you receive? When do you generally receive it? Which of the advertising that you receive at home do you use? When do you like to receive the advertising that you get? Are certain items time sensitive for you – describe? How has your use of the advertising you receive changed during the past five years – i.e., do you receive more or less using the Postal Service? When, how, and why?

What types of **packages** do you typically receive at your home? How many and how often? How does this vary by time of year? What proportion of them is delivered by the Postal Service versus another delivery service? When do you prefer to receive packages at your home? Why? How has

this changed during the past five years – i.e., do you do more or less using the Postal Service? When, how, and why? How about sending packages? How often do you send packages? What do you do when you want to send packages – what service do you use and why? Where do you go to send packages and why? How does your behavior vary by time of year?

How many **magazines** do you subscribe to and typically receive at your home? When do you generally receive them? When do you generally read your magazines? Do you have a strong preference when you receive your magazines and why? What magazines that you receive are time sensitive? How has this changed during the past five years – e.g., do you get more or less, do you subscribe to online magazines, etc.?

Finally, thinking about your regular routine in sending / receiving mail at your home are there days of the week when you do more mail tasks / other days when you do less? When and why?

Attitudes toward the Postal Service

10 minutes

- What do you currently think about / feel about the level and quality of services you currently receive from USPS? What works particularly well for your household – notably in terms of the types of “mail moments” we just finished talking about?
- When you send a letter or when someone tells you they have sent you a letter / bill / check / etc. using first class mail – what do you plan for / expect in terms of the number of days it takes from when you send / it is sent until receipt for:
 - Local / intercity / metro market mail
 - To another major metro market across the country
 - All other locations in the United States
- What key aspects of USPS services do you really value – i.e., what is really important to you?
- What aspects of USPS services do you feel are very important – i.e., you would have major problems without them?

Current Situation

30 minutes

The situation today: As a result of the current recession, huge volume and revenue declines, and a legal requirement to annually prepay over \$5 billion in future retiree health benefits, USPS is facing a massive deficit of \$7 billion this year. And, it will face a similar deficit next year.

- If you were the CEO of the Postal Service what do you think would be the best ways for the Postal Service to address this deficit?
 - What changes in services would you suggest? What other changes do you think you would recommend?
- Now put your consumer hat back on. What changes are you willing as a consumer to accept to help the Postal Service address this deficit? Would you rather the Postal Service makes service changes or raise prices significantly – 10 percent across the board – to eliminate this deficit?

Let’s consider one scenario that is being considered. Federal law has required that mail be picked up and delivered six days a week since 1983. The Postal Service has asked Congress earlier this year to approve a reduction in service to five days per week.

- What is your immediate reaction to this proposal?
- What are its advantages / disadvantages?
- What are your immediate questions / concerns regarding this proposal?

- Which of these changes would have the **most significant impact** on how you currently do any of the things we talked about above? What would be the impact and why?
- Thinking back to the routines you described earlier, what changes to these routines would you have to make? How difficult would it be for you to make those changes and why?
 - Your household’s financial transactions
 - Your general correspondence – e.g., sending / receiving cards, letters, etc.
 - Express or Priority Mail
 - Your use of advertising / catalogs / direct mail / coupons
 - Packages you send and/or receive
 - Magazines you receive
- How do you think you would adjust? What changes would you make in use of postal services?

Hand out concept statement (Appendix D, Part 1) and have them discuss:

- What are your immediate reactions – overall.
 - What is your immediate reaction to this proposal?
 - What are your immediate questions / concerns regarding this proposal?
 - How would this impact how you use USPS services?
 - How would this impact how you use postal services?
- Each bullet point – focus specifically on collection from boxes / at Post offices; no processing over weekend – i.e., if into system on Friday will continue to be processed; if not in system Friday no processing until Monday.
 - What is your immediate reaction to this proposal?
 - What are your immediate questions / concerns regarding this proposal?
 - How would this impact you use USPS?
 - How would this impact how you use postal services?
- How would these changes impact what you think about the level and value of services offered by USPS?
 - Specifically, how would you expect this change to impact the way you think about the amount of in-transit time for
 - Local / intercity / metro market mail
 - To another major metro market across the country
 - All other locations in the United States

Now given what we have been discussing, what do you feel the Postal Service should do (written / discuss) [Written exercise document Appendix D, Part 2]?

If these were the only two options to reduce the deficit the USPS is facing which would you choose?										
Strongly Choose 5-day week service delivery								Strongly Choose 10 percent across-the-board rate increase		
○	○	○	○	○	○	○	○	○	○	○

*Mitigation**30 minutes*

Are there specific times of the year / month or are there specific situations where five-day delivery would have a greater / more negative impact on your lives?

- Describe specifically.
- How could these impacts be minimized? What could you do differently? What could the the Postal Service do to minimize these impacts?

Here are some things the Post Service is considering to help minimize these impacts. How will these affect you and would they make it easier for you to adapt to 5 day delivery?

- Collection of mail on Saturday -- What would be your expectation of delivery of such mail?
- Delivery of Priority Mail on Saturday? With a surcharge?
- Delivery of packages the 2 or 3 Saturdays before Christmas
- Delivery and collection of mail on Saturday when there is a three day holiday – i.e., Monday or Friday is a holiday

If they did some of the things we just discussed, what do you feel the Postal Service should do (written / discuss)? [Written exercise document shown in Appendix D, Part 2] Of these strategies we just discussed, what would you really want to have the Postal Service do to make it easier for you to accept five day a week mail delivery?

- If they did some of these things, how would these changes impact what you think about the level and value of services offered by the Postal Service?

What is the most effective way to communicate with you regarding changes in postal services?

- What would you have the Postal Service write in a letter to consumers regarding this change? What should they say and how should they say it?
- Okay – so what if we tell you this? Hand out sheet. [Written exercise document in Appendix D, Part 3]

*Wrap-Up Attitudes toward USPS**10 minutes*

- After all of this discussion – If the Postal Service implements 5 day delivery, how will this affect your thoughts about the level and quality of services you currently receive from the Postal Service?

I'd like to have you do one more thing for me. Think about everything we have talked about here and take a minute to write down an answer to this question.

- If you were to write a letter about your feelings regarding this proposed change, who would you write it to and what would you say? [Written exercise document shown in Appendix D, Part 2]

Additional questions from back room.

Final WRAP-UP – Thinking about everything we said if the Postal Service goes to 5-day a week service, would you use USPS services more, the same as now, or less? For less – specifically what would you do less via the Postal Service?

Appendix D: Written Documents Used in Focus Groups

Part 1: Description of Five-Day Delivery Concept

USPS Saturday Service Concept

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.
- Mail will continue to be delivered to PO Boxes Monday – Saturday.
- Post Offices currently open on Saturday will remain open.
- No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
- Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no pickup of Express or Priority Mail on Saturday.

Part 2: Written Exercise – Scale and Final Wrap-Up

If these were the only two options to reduce the deficit the USPS is facing which would you choose?									
Strongly Choose 5-day week service delivery									Strongly Choose 10 percent across-the-board rate increase
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Letter

To:

What:

Part 3: Communications Message Points

Five-Day Delivery

- The economic situation and the increased use of the Internet have severely impacted Postal Service revenues. We expect in 2009 a decrease of over 25 billion pieces of mail annually, which is a 13 percent decline compared to 2008. Revenue has declined by about \$9 billion in 2009 versus 2008.
- Since 1999, our costs have increased because the number of addresses served has grown from 134 million to 150 million.
- We have reduced our workforce 20 percent since 1999, eliminating 150,000 jobs in the last three years alone. Management pay has been capped. In 2009, we will reduce costs by \$5.9 billion, which is about 8 percent of total costs of about \$70 billion.
- We have implemented a growth strategy based on pricing and product innovation to offer even more value to customers. This includes pricing incentives for package shippers who pay online. We have made it more convenient for our retail customers, deploying over 2,500 automated postal centers in Post Offices.
- Nevertheless, the Postal Service faces a deficit of over \$7 billion. The deficit will be reduced in part by eliminating Saturday delivery which will save over \$3.3 billion annually.
- The rest of the deficit will be eliminated by restructuring payment of about \$5.6 billion annually for prepayment of future retiree health benefits that are now required by law.
- All other current service performance levels will be maintained, if not improved.

Appendix D: IDI Interview Guide

***Moderator's Guide
USPS Five-Day Delivery
In Depth Interviews
National and Premier Accounts***

Objectives

- Develop a deep understanding of current operations and the specific impacts (financial, organization, operations, etc.) the proposed five-day delivery schedule would have on large companies / high volume users businesses / business practices
- Assess how these large companies / high volume mail processors could / would be willing to adjust their operations to accommodate a five-day per week delivery schedule
- Assess how difficult it will be for large companies / high volume mail processors to adjust and why. Discuss what issues/problems they will have.
- Assess large companies / high volume mail processor's perceptions of the Postal Service's reasons for the change.
- Identify / test strategies by which the Post Service could mitigate the impact of this change in service large companies / high volume mail processors.

▪ ***Overview***

30 IDIs will be completed with National and Premier Accounts as follows:

<i>Segment</i>	<i>National</i>	<i>Premier</i>
Direct marketing	3	2
Billing	3	2
Remittance / Payments	3	2
Shipping / distribution	3	2
Publishing – Periodicals	2	1
Publishing – Catalogs	2	1
Publishing – Newspapers	1	1
Non-Profits	1	1
Total	18	12

*Introductions & Instructions**3 minutes*

Purpose of IDI's

- Opinions / how feel and why.
- No right or wrong answers.
- How results will be used
- Tape
- Confidentiality
- Emphasis on elaborate but succinct responses (not a complaining session)

Personal Introduction(s) – Name, job title, your specific role / duties

Describe your staff (if applicable) and their responsibilities as they pertain to USPS.

*Current Situation**5 minutes*

Let's start by how your company and specifically how your division / department uses the USPS services for [SPECIFIC APPLICATION FOR WHICH RECRUITED].

- Please describe your regular process for the management of _____. In particular tell me about key timing / scheduling considerations for the management of _____.
- What are the key financial considerations when using USPS services for _____? What would be the financial impacts of any changes to your current systems / processes?
- What are the key operational considerations when using USPS for _____? What would be the operational impacts of any changes to your current systems / processes?
 - What could be changed / what could not?
- What are the key organizational considerations when using USPS for _____? What would be the organizational impacts of any changes to your current systems / processes?
 - What could be changed / what could not?
- What are the key customer service considerations when using USPS for _____? What would be the customer service impacts of any changes to your current systems / processes?
 - What could be changed / what could not?

*Attitudes toward Postal Service**5 minutes*

- What do you currently think about / feel about the level and quality of services you currently receive from the Postal Service? What works particularly well for your business?
- What key aspects of USPS services do you really value – i.e., what is really important to you?
- What aspects of USPS services do you feel **are very important** – i.e., you would **have major problems** without them?

Current Situation

10 minutes

As you are aware, the Postal Service is facing an unprecedented situation. As a result of the current recession, **huge volume and revenue declines, and a legal requirement to annually prepay over \$5 billion in retiree health benefits, USPS is facing a massive deficit of \$7 billion this year. And, it will face a similar deficit next year.**

Let's consider one scenario that is being considered. Federal law has required that mail be picked up and delivered six days a week since 1983. USPS has asked Congress earlier this year to approve a reduction in service to five days a week. Specifically, USPS is proposing [READ CONCEPT STATEMENT].

- What is your immediate reaction to this proposal?
- What are your immediate questions / concerns regarding this proposal?
- What do you foresee as the financial impacts of this proposal on your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- What do you foresee as the management impacts of this proposal on your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- What do you foresee as the operational impacts of this proposal on your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- What do you foresee as the customer service impacts of this proposal on your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?

Let's look at some specific aspects of the proposed plan, and tell me more specifically what the potential impacts on your business are.

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday **only**. Mail will continue to be delivered to PO Box addresses (PO Boxes, Caller Service and National Firm Holdouts) Monday - Saturday.
 - How does this impact your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- Remittance mail that is picked up at a plant on Saturday and/or Sunday will continue to be picked up on those days. [Do not include for single piece mailers].
 - How does this impact your business?

- What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- Post Offices will remain open on Saturday.
 - How does this impact your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- No mail will be collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.
 - How does this impact your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- Bulk mail entry units will be closed on Saturday. However, Detached Mail Units currently open on Saturday and/or Sunday will remain open. Mail will continue to be accepted and verified at DMUs on Saturday and/or Sunday. [Do not include for single piece mailers.]
 - How does this impact your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- Destinating entry bulk mail can continue to be drop shipped at plants on Saturday and Sunday and at delivery units on Saturday. However, time slots for dropping the mail will be shortened. Mail dropped shipped at a plant on Saturday or Sunday will be processed on Monday. Standard Mail dropped shipped at a delivery unit on Saturday will be delivered by Tuesday. [Do not include for single piece mailers.]
 - How does this impact your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
 - How does this impact your business?
 - What will you need to change / do differently if this proposal is enacted?
 - How difficult will it be for your company to make these changes?
 - What can't you change?
- Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted

and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.

- How does this impact your business?
- What will you need to change / do differently if this proposal is enacted?
- How difficult will it be for your company to make these changes?
- What can't you change?

Wrap-Up

7 minutes

Are there specific times of the year / month or are there specific situations where the proposed 5 day a week delivery would have a greater / more negative impact on your business?

- Describe specifically.
 - What about the Thanksgiving to XMAS holiday period?
 - What about 3 day holiday weekends (e.g., Labor Day, Memorial Day)?
- How could these impacts be minimized? What could you do differently? What could the USPS do to minimize these impacts?
- USPS has identified some potential issues that businesses might face because of this proposal. I would like to run through this list with you. For each one tell me whether it is an issue for your business

Is there anything else you'd like to say with regard to the potential changes we've been discussing?

Appendix E: Business Segments Questionnaires

Part 1: National Accounts

USPS 5-Day Delivery Research
- Questionnaire: National Accounts -

NOTE: DIRECTIONS IN BOLD UPPER CASE ARE PROGRAMMER INSTRUCTIONS; THESE INSTRUCTIONS WILL NOT BE SHOWN TO INTERVIEWERS OR RESPONDENTS. THE PROGRAMMER WILL ENSURE THAT ONLY THE APPLICABLE QUESTIONS/RESPONSES WILL BE SHOWN TO EACH RESPONDENT, BASED ON THEIR SEGMENT AND THEIR PRIOR RESPONSES.

INTRODUCTION

Hello, my name is _____ calling from Opinion Research Corporation on behalf of the United States Postal Service. May I please speak with the person who makes decisions and/or recommendations on how to send your organizations mail and packages?

- 1 CONNECTING (**CONTINUE**)
- 2 RESPONDENT NOT AVAILABLE (**SCHEDULE CALLBACK**)
- 3 DOES NOT SEND MAIL/PACKAGES (**THANK AND CONCLUDE**)
- 4 REFUSED (**THANK AND CONCLUDE**)
- 5 REQUESTS INFORMATIONAL E-MAIL TO BE SENT (**SCHEDULE CALLBACK**)
- 6 REQUESTS INFORMATIONAL FAX TO BE SENT (**SCHEDULE CALLBACK**)

Hello, my name is _____ calling from Opinion Research Corporation. We have been commissioned by the United States Postal Service to contact organizations nationwide to obtain feedback on how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

First, I have a few questions to ask you to see if you qualify. If you do, the survey will take less than 10 minutes to complete. We know your time is very valuable, so we are offering a \$50 gift card as a token of our appreciation for completing the survey.

- 1 ALLOWS YOU TO CONTINUE (**CONTINUE**)
- 2 RESPONDENT NOT AVAILABLE AT THIS TIME (**SCHEDULE CALLBACK**)
- 3 REFERRAL PROVIDED (**OBTAIN NAME AND PHONE NUMBER, ASK TO BE TRANSFERRED AND START OVER**)
- 4 DOES NOT SEND MAIL (**THANK AND CONCLUDE**)
- 5 REFUSED (**THANK AND CONCLUDE**)
- 6 REQUESTS INFORMATIONAL E-MAIL TO BE SENT (**SCHEDULE CALLBACK**)
- 7 REQUESTS INFORMATIONAL FAX TO BE SENT (**SCHEDULE CALLBACK**)

S2A Are you the person in your business that is primarily responsible for deciding how to send your business' mail and/or packages?

- 1 Yes (**CONTINUE**)
- 2 No (**ASK TO SPEAK WITH PERSON WHO IS RESPONSIBLE AND START OVER**)

S3 Do you or any close family members work in ...

- 1 Advertising or Public Relations **(THANK AND CONCLUDE)**
- 2 Market Research **(THANK AND CONCLUDE)**
- 3 Mail or Small Package Delivery **(THANK AND CONCLUDE)**
- 4 None of the above **(CONTINUE)**

S4 Which of the following best describes your organization's primary industry?

- 1 Agriculture, Forestry, and Fishing
- 2 Mining
- 3 Construction
- 4 Manufacturing
- 5 Transportation
- 6 Telecommunications
- 7 Utilities
- 8 Wholesale Trade
- 9 Retail Trade or Mail Order
- 10 Finance, Insurance, or Real Estate
- 11 Publishing
- 12 Services (including non-profit organizations or membership organizations)
- 13 Government or Public Administration
- 95 Some other industry _____ **(SPECIFY)**

S5 Including yourself, how many people are employed by your company at your location?

_____ **(RECORD NUMBER OF EMPLOYEES 1 – 9999)**

For the remainder of the survey, please think only about the mail or package applications you are responsible for.

S7 For which of the following mail or package applications do you have responsibility? **(READ LIST 1 – 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.) (RANDOMIZE CODES 1 – 7)**

- 1 Bills, invoices or statements
- 2 Payments
- 3 Advertising or marketing materials including flyers, circulars, catalogs, etc.
- 4 General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.
- 5 Periodicals or newspapers
- 6 Packages
- 7 Newsletters
- 91 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 92 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 97 None of the above **(THANK AND CONCLUDE)**
- 98 Don't know **(THANK AND CONCLUDE)**

IF S7 = CODE 7, THEN ASK S7A

S7a How do you send your newsletters? Do you send them via ...

- 1 USPS Single Piece First-Class Mail
- 2 USPS Pre-Sort First-Class Mail
- 3 USPS Regular Standard/Bulk Mail
- 4 USPS Non-Profit Standard/Bulk Mail
- 5 USPS Regular Periodical Mail
- 6 USPS Non-Profit Periodical Mail
- 91 Some other way _____ (SPECIFY)
- 92 Some other way _____ (SPECIFY)

MAIN QUESTIONNAIRE

We appreciate your willingness to help us. The focus of this research is to understand how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

ONLY DISPLAY APPLICATIONS SELECTED IN S7

Q1 First, during the **PAST 12 months**, how many individual pieces of the following did your organization send? (**RANDOMIZE A – J IN THE SAME ORDER AS S7**)

As I read each area please provide the number of individual pieces your organization has sent during the past 12 months. **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE.**

	Number of Pieces Sent in Past 12 Months (Denomination)	Number of Pieces in Sent in Past 12 Months (Digits)
A. Bills, invoices or statements	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

PROGRAMMING NOTE: THANK AND CONCLUDE INTERVIEW IF DON'T KNOW OR ZERO PIECES SENT FOR ALL APPLICATIONS ASKED ABOUT.

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q1, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q2k Thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent during the **PAST 12 months**, how have you sent them? Have you sent them via ... **(READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.)**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via FCM</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

MUST SELECT CODE 1 – 11 FOR AT LEAST ONE APPLICATION, OTHERWISE THANK AND CONCLUDE

ASK Q3K FOR EACH APPLICATION SELECTED IN S7 AND Q1 > 0 IN Q1 THAT HAS MULTIPLE RESPONSES IN Q2K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q2K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q2K, AUTOPUNCH 100 FOR IT IN Q3K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q3k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent in the **PAST** 12 months, what percent was sent via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Now we would like you to focus on the NEXT 12 months.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 & Q1 > 0

Q4 I am going to read to you the number of pieces you indicated your organization has sent during the past 12 months and I would like for you to tell me in the **NEXT** 12 months, how many individual pieces of each of the following you anticipate your organization will send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

During the past 12 months, you indicated you had sent **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the next 12 months, how many individual pieces do you anticipate your organization will send?
INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Sent in Past 12 Months	Number of Pieces Anticipate Sending in Next 12 Months (Denomination)	Number of Pieces Anticipate Sending in Next 12 Months (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q4, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q5k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, how do you plan to send them? Do you plan to send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q6K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 > 0 THAT HAS MULTIPLE RESPONSES IN Q5K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q5K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q5K, AUTOPUNCH 100 FOR IT IN Q6K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q6k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, what percent will you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

And now we are going to provide a description of a proposed change in service from the USPS.

Despite very aggressive cost cutting, the Postal Service is projecting financial losses for this and the next several years. This is due to a significant decline in mail volume and a major requirement to prefund its retiree's health benefits. The Postal Service is committed to fulfilling its fundamental role as a deliverer of mail and packages to all Americans. To accomplish this, the Postal Service is developing a plan to transition from six- to five-day delivery on a national basis. This will remove delivery costs and help bring the financial picture into better balance.

The key components to the 5-Day plan are as follows:

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.
- Mail will continue to be delivered to PO Box addresses **[IF Q2 = 3, 4, 5, 10 OR 11, ADD: (including PO Boxes, Caller Service and National Firm Holdouts)]** Monday - Saturday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Remittance mail that is picked up at a plant on Saturday and/or Sunday will continue to be picked up on those days.
- Post Offices will remain open on Saturday.
- No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Bulk mail entry units will be closed on Saturday. However, Detached Mail Units currently open on Saturday and/or Sunday will remain open. Mail will continue to be accepted and verified at DMUs on Saturday and/or Sunday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Destinating entry bulk mail can continue to be drop shipped at plants on Saturday and Sunday and at delivery units on Saturday. However, time slots for dropping the mail will be shortened. Mail dropped shipped at a plant on Saturday or Sunday will be processed on Monday. Standard Mail dropped shipped at a delivery unit on Saturday will be delivered by Tuesday.
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
- Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.

Q10k If the service change described does happen, what is the likelihood that this change would cause your organization to modify the number of individual pieces of mail and/or packages your organization sends or the way you send it? Please answer using a scale from 0 to 10, where “10” means extremely likely and a “0” means extremely unlikely.

10 Extremely likely
 9
 8
 7
 6
 5
 4
 3
 2
 1
 0 Extremely unlikely

IF Q10 = 0, THEN SKIP TO Q11

For the next several questions, please answer based on the assumption that the changes described would happen.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0

Q7 Now I am going to read to you the number of pieces you said your organization will send in the next 12 months and I would like for you to tell me in the first 12 months after the change in service is implemented, how many individual pieces of each of the following do you anticipate your organization would send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

In the next 12 months you indicated your organization will send **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the first 12 months after the change in service is implemented, how many individual pieces do you anticipate your organization will send? **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION**

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Anticipate Sending in Next 12 Months	Number of Pieces Anticipate Sending After Change in Service (Denomination)	Number of Pieces Anticipate Sending After Change in Service (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q7, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 USE THIS TEXT

Q8k Thinking about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change is implemented, how do you think you would send them? Would you send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q9K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 THAT HAS MULTIPLE RESPONSES IN Q8K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q8K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q8K, AUTOPUNCH 100 FOR IT IN Q9K.

ONLY DISPLAY APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 AND USE THIS TEXT

Q9k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change in service is implemented, what percent would you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Q11 Does your firm currently have a Post Office Box, or do you have plans to get one?

- 1 Currently have one
- 2 Have plans to get one
- 3 Neither have one nor plan to get one

IF Q11 = CODE 3, THEN ASK Q12

Q12 If the change in USPS service is implemented, do you anticipate that your firm would get a Post Office Box?

- 1 Yes
- 2 No

CLOSING

Q24 Those are all the research questions we have for you today. As a token of our appreciation for participating, we will be sending you a \$50 gift card for Amazon.com.

- 1 I accept the Amazon.com gift card
- 2 I decline or cannot accept the Amazon.com gift card.

IF Q24 = CODE 1, THEN ASK Q25A

Q25a What e-mail address would you like to have the gift card sent?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = CODE 1, THEN ASK Q25B

Q25b And I would just like to confirm that I entered your e-mail address correctly. Is it **(INSERT E-MAIL ADDRESS FROM Q25A)**?

- 1 Yes, that is correct
- 2 No, that is not correct

IF Q25B = CODE 2, THEN ASK Q25C

Q25c And what is the correct e-mail address?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = 1, THEN DISPLAY:

Thank you again for participating in this important research study. The gift card will be emailed sometime in November when the study is completed.

IF Q24 = 2, THEN DISPLAY:

Thank you again for participating in this important research study.

Part 2: Preferred Accounts

USPS 5-Day Delivery Research - Questionnaire: National Accounts -

NOTE: DIRECTIONS IN BOLD UPPER CASE ARE PROGRAMMER INSTRUCTIONS; THESE INSTRUCTIONS WILL NOT BE SHOWN TO INTERVIEWERS OR RESPONDENTS. THE PROGRAMMER WILL ENSURE THAT ONLY THE APPLICABLE QUESTIONS/RESPONSES WILL BE SHOWN TO EACH RESPONDENT, BASED ON THEIR SEGMENT AND THEIR PRIOR RESPONSES.

INTRODUCTION

Hello, my name is _____ calling from Opinion Research Corporation on behalf of the United States Postal Service. May I please speak with the person who makes decisions and/or recommendations on how to send your organizations mail and packages?

- 1 **CONNECTING (CONTINUE)**
- 2 **RESPONDENT NOT AVAILABLE (SCHEDULE CALLBACK)**
- 3 **DOES NOT SEND MAIL/PACKAGES (THANK AND CONCLUDE)**
- 4 **REFUSED (THANK AND CONCLUDE)**
- 5 **REQUESTS INFORMATIONAL E-MAIL TO BE SENT (SCHEDULE CALLBACK)**
- 6 **REQUESTS INFORMATIONAL FAX TO BE SENT (SCHEDULE CALLBACK)**

Hello, my name is _____ calling from Opinion Research Corporation. We have been commissioned by the United States Postal Service to contact organizations nationwide to obtain feedback on how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

First, I have a few questions to ask you to see if you qualify. If you do, the survey will take less than 10 minutes to complete. We know your time is very valuable, so we are offering a \$50 gift card as a token of our appreciation for completing the survey.

- 1 **ALLOWS YOU TO CONTINUE (CONTINUE)**
- 2 **RESPONDENT NOT AVAILABLE AT THIS TIME (SCHEDULE CALLBACK)**
- 3 **REFERRAL PROVIDED (OBTAIN NAME AND PHONE NUMBER, ASK TO BE TRANSFERRED AND START OVER)**
- 4 **DOES NOT SEND MAIL (THANK AND CONCLUDE)**
- 5 **REFUSED (THANK AND CONCLUDE)**
- 6 **REQUESTS INFORMATIONAL E-MAIL TO BE SENT (SCHEDULE CALLBACK)**
- 7 **REQUESTS INFORMATIONAL FAX TO BE SENT (SCHEDULE CALLBACK)**

S2A Are you the person in your business that is primarily responsible for deciding how to send your business' mail and/or packages?

- 1 **Yes (CONTINUE)**
- 2 **No (ASK TO SPEAK WITH PERSON WHO IS RESPONSIBLE AND START OVER)**

S3 Do you or any close family members work in ...

- 1 Advertising or Public Relations **(THANK AND CONCLUDE)**
- 2 Market Research **(THANK AND CONCLUDE)**
- 3 Mail or Small Package Delivery **(THANK AND CONCLUDE)**
- 4 None of the above **(CONTINUE)**

S4 Which of the following best describes your organization's primary industry?

- 1 Agriculture, Forestry, and Fishing
- 2 Mining
- 3 Construction
- 4 Manufacturing
- 5 Transportation
- 6 Telecommunications
- 7 Utilities
- 8 Wholesale Trade
- 9 Retail Trade or Mail Order
- 10 Finance, Insurance, or Real Estate
- 11 Publishing
- 12 Services (including non-profit organizations or membership organizations)
- 13 Government or Public Administration
- 95 Some other industry _____ **(SPECIFY)**

S5 Including yourself, how many people are employed by your company at your location?

_____ **(RECORD NUMBER OF EMPLOYEES 1 – 9999)**

For the remainder of the survey, please think only about the mail or package applications you are responsible for.

S7 For which of the following mail or package applications do you have responsibility? **(READ LIST 1 – 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.) (RANDOMIZE CODES 1 – 7)**

- 1 Bills, invoices or statements
- 2 Payments
- 3 Advertising or marketing materials including flyers, circulars, catalogs, etc.
- 4 General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.
- 5 Periodicals or newspapers
- 6 Packages
- 7 Newsletters
- 91 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 92 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 97 None of the above **(THANK AND CONCLUDE)**
- 98 Don't know **(THANK AND CONCLUDE)**

IF S7 = CODE 7, THEN ASK S7A

S7a How do you send your newsletters? Do you send them via ...

- 2 USPS Single Piece First-Class Mail
- 3 USPS Pre-Sort First-Class Mail
- 4 USPS Regular Standard/Bulk Mail
- 5 USPS Non-Profit Standard/Bulk Mail
- 10 USPS Regular Periodical Mail
- 11 USPS Non-Profit Periodical Mail
- 91 Some other way _____ (SPECIFY)
- 92 Some other way _____ (SPECIFY)

MAIN QUESTIONNAIRE

We appreciate your willingness to help us. The focus of this research is to understand how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

ONLY DISPLAY APPLICATIONS SELECTED IN S7

Q1 First, during the **PAST 12 months**, how many individual pieces of the following did your organization send? (**RANDOMIZE A – J IN THE SAME ORDER AS S7**)

As I read each area please provide the number of individual pieces your organization has sent during the past 12 months. **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE.**

	Number of Pieces Sent in Past 12 Months (Denomination)	Number of Pieces in Sent in Past 12 Months (Digits)
A. Bills, invoices or statements	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

PROGRAMMING NOTE: THANK AND CONCLUDE INTERVIEW IF DON'T KNOW OR ZERO PIECES SENT FOR ALL APPLICATIONS ASKED ABOUT.

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q1, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q2k Thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent during the **PAST 12 months**, how have you sent them? Have you sent them via ... **(READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.)**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via FCM</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

MUST SELECT CODE 1 – 11 FOR AT LEAST ONE APPLICATION, OTHERWISE THANK AND CONCLUDE

ASK Q3K FOR EACH APPLICATION SELECTED IN S7 AND Q1 > 0 IN Q1 THAT HAS MULTIPLE RESPONSES IN Q2K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q2K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q2K, AUTOPUNCH 100 FOR IT IN Q3K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q3k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent in the **PAST** 12 months, what percent was sent via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Now we would like you to focus on the NEXT 12 months.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 & Q1 > 0

Q4 I am going to read to you the number of pieces you indicated your organization has sent during the past 12 months and I would like for you to tell me in the **NEXT** 12 months, how many individual pieces of each of the following you anticipate your organization will send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

During the past 12 months, you indicated you had sent **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the next 12 months, how many individual pieces do you anticipate your organization will send?
INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Sent in Past 12 Months	Number of Pieces Anticipate Sending in Next 12 Months (Denomination)	Number of Pieces Anticipate Sending in Next 12 Months (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q4, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q5k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, how do you plan to send them? Do you plan to send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q6K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 > 0 THAT HAS MULTIPLE RESPONSES IN Q5K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q5K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q5K, AUTOPUNCH 100 FOR IT IN Q6K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q6k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, what percent will you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

And now we are going to provide a description of a proposed change in service from the USPS.

Despite very aggressive cost cutting, the Postal Service is projecting financial losses for this and the next several years. This is due to a significant decline in mail volume and a major requirement to prefund its retiree's health benefits. The Postal Service is committed to fulfilling its fundamental role as a deliverer of mail and packages to all Americans. To accomplish this, the Postal Service is developing a plan to transition from six- to five-day delivery on a national basis. This will remove delivery costs and help bring the financial picture into better balance.

The key components to the 5-Day plan are as follows:

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.
- Mail will continue to be delivered to PO Box addresses **[IF Q2 = 3, 4, 5, 10 OR 11, ADD: (including PO Boxes, Caller Service and National Firm Holdouts)]** Monday - Saturday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Remittance mail that is picked up at a plant on Saturday and/or Sunday will continue to be picked up on those days.
- Post Offices will remain open on Saturday.
- No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Bulk mail entry units will be closed on Saturday. However, Detached Mail Units currently open on Saturday and/or Sunday will remain open. Mail will continue to be accepted and verified at DMUs on Saturday and/or Sunday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Destinating entry bulk mail can continue to be drop shipped at plants on Saturday and Sunday and at delivery units on Saturday. However, time slots for dropping the mail will be shortened. Mail dropped shipped at a plant on Saturday or Sunday will be processed on Monday. Standard Mail dropped shipped at a delivery unit on Saturday will be delivered by Tuesday.
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
- Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.

Q10k If the service change described does happen, what is the likelihood that this change would cause your organization to modify the number of individual pieces of mail and/or packages your organization sends or the way you send it? Please answer using a scale from 0 to 10, where “10” means extremely likely and a “0” means extremely unlikely.

10	Extremely likely
9	
8	
7	
6	
5	
4	
3	
2	
1	
0	Extremely unlikely

IF Q10 = 0, THEN SKIP TO Q11

For the next several questions, please answer based on the assumption that the changes described would happen.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0

Q7 Now I am going to read to you the number of pieces you said your organization will send in the next 12 months and I would like for you to tell me in the first 12 months after the change in service is implemented, how many individual pieces of each of the following do you anticipate your organization would send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

In the next 12 months you indicated your organization will send **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the first 12 months after the change in service is implemented, how many individual pieces do you anticipate your organization will send? **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION**

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Anticipate Sending in Next 12 Months	Number of Pieces Anticipate Sending After Change in Service (Denomination)	Number of Pieces Anticipate Sending After Change in Service (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q7, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 USE THIS TEXT

Q8k Thinking about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change is implemented, how do you think you would send them? Would you send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q9K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 THAT HAS MULTIPLE RESPONSES IN Q8K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q8K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q8K, AUTOPUNCH 100 FOR IT IN Q9K.

ONLY DISPLAY APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 AND USE THIS TEXT

Q9k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change in service is implemented, what percent would you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
		TOTAL = 100%

Q11 Does your firm currently have a Post Office Box, or do you have plans to get one?

- 1 Currently have one
- 2 Have plans to get one
- 3 Neither have one nor plan to get one

IF Q11 = CODE 3, THEN ASK Q12

Q12 If the change in USPS service is implemented, do you anticipate that your firm would get a Post Office Box?

- 1 Yes
- 2 No

CLOSING

Q24 Those are all the research questions we have for you today. As a token of our appreciation for participating, we will be sending you a \$50 gift card for Amazon.com.

- 1 I accept the Amazon.com gift card
- 2 I decline or cannot accept the Amazon.com gift card.

IF Q24 = CODE 1, THEN ASK Q25A

Q25a What e-mail address would you like to have the gift card sent?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = CODE 1, THEN ASK Q25B

Q25b And I would just like to confirm that I entered your e-mail address correctly. Is it **(INSERT E-MAIL ADDRESS FROM Q25A)**?

- 1 Yes, that is correct
- 2 No, that is not correct

IF Q25B = CODE 2, THEN ASK Q25C

Q25c And what is the correct e-mail address?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = 1, THEN DISPLAY:

Thank you again for participating in this important research study. The gift card will be emailed sometime in November when the study is completed.

IF Q24 = 2, THEN DISPLAY:

Thank you again for participating in this important research study.

Part 3: Premier Accounts

USPS 5-Day Delivery Research - Questionnaire: National Accounts -

NOTE: DIRECTIONS IN BOLD UPPER CASE ARE PROGRAMMER INSTRUCTIONS; THESE INSTRUCTIONS WILL NOT BE SHOWN TO INTERVIEWERS OR RESPONDENTS. THE PROGRAMMER WILL ENSURE THAT ONLY THE APPLICABLE QUESTIONS/RESPONSES WILL BE SHOWN TO EACH RESPONDENT, BASED ON THEIR SEGMENT AND THEIR PRIOR RESPONSES.

INTRODUCTION

Hello, my name is _____ calling from Opinion Research Corporation on behalf of the United States Postal Service. May I please speak with the person who makes decisions and/or recommendations on how to send your organizations mail and packages?

- 1 **CONNECTING (CONTINUE)**
- 2 **RESPONDENT NOT AVAILABLE (SCHEDULE CALLBACK)**
- 3 **DOES NOT SEND MAIL/PACKAGES (THANK AND CONCLUDE)**
- 4 **REFUSED (THANK AND CONCLUDE)**
- 5 **REQUESTS INFORMATIONAL E-MAIL TO BE SENT (SCHEDULE CALLBACK)**
- 6 **REQUESTS INFORMATIONAL FAX TO BE SENT (SCHEDULE CALLBACK)**

Hello, my name is _____ calling from Opinion Research Corporation. We have been commissioned by the United States Postal Service to contact organizations nationwide to obtain feedback on how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

First, I have a few questions to ask you to see if you qualify. If you do, the survey will take less than 10 minutes to complete. We know your time is very valuable, so we are offering a \$50 gift card as a token of our appreciation for completing the survey.

- 1 **ALLOWS YOU TO CONTINUE (CONTINUE)**
- 2 **RESPONDENT NOT AVAILABLE AT THIS TIME (SCHEDULE CALLBACK)**
- 3 **REFERRAL PROVIDED (OBTAIN NAME AND PHONE NUMBER, ASK TO BE TRANSFERRED AND START OVER)**
- 4 **DOES NOT SEND MAIL (THANK AND CONCLUDE)**
- 5 **REFUSED (THANK AND CONCLUDE)**
- 6 **REQUESTS INFORMATIONAL E-MAIL TO BE SENT (SCHEDULE CALLBACK)**
- 7 **REQUESTS INFORMATIONAL FAX TO BE SENT (SCHEDULE CALLBACK)**

S2A Are you the person in your business that is primarily responsible for deciding how to send your business' mail and/or packages?

- 1 **Yes (CONTINUE)**
- 2 **No (ASK TO SPEAK WITH PERSON WHO IS RESPONSIBLE AND START OVER)**

S3 Do you or any close family members work in ...

- 1 Advertising or Public Relations **(THANK AND CONCLUDE)**
- 2 Market Research **(THANK AND CONCLUDE)**
- 3 Mail or Small Package Delivery **(THANK AND CONCLUDE)**
- 4 None of the above **(CONTINUE)**

S4 Which of the following best describes your organization's primary industry?

- 1 Agriculture, Forestry, and Fishing
- 2 Mining
- 3 Construction
- 4 Manufacturing
- 5 Transportation
- 6 Telecommunications
- 7 Utilities
- 8 Wholesale Trade
- 9 Retail Trade or Mail Order
- 10 Finance, Insurance, or Real Estate
- 11 Publishing
- 12 Services (including non-profit organizations or membership organizations)
- 13 Government or Public Administration
- 95 Some other industry _____ **(SPECIFY)**

S5 Including yourself, how many people are employed by your company at your location?

_____ **(RECORD NUMBER OF EMPLOYEES 1 – 9999)**

For the remainder of the survey, please think only about the mail or package applications you are responsible for.

S7 For which of the following mail or package applications do you have responsibility? **(READ LIST 1 – 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.) (RANDOMIZE CODES 1 – 7)**

- 1 Bills, invoices or statements
- 2 Payments
- 3 Advertising or marketing materials including flyers, circulars, catalogs, etc.
- 4 General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.
- 5 Periodicals or newspapers
- 6 Packages
- 7 Newsletters
- 91 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 92 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 97 None of the above **(THANK AND CONCLUDE)**
- 98 Don't know **(THANK AND CONCLUDE)**

IF S7 = CODE 7, THEN ASK S7A

S7a How do you send your newsletters? Do you send them via ...

- 2 USPS Single Piece First-Class Mail
- 3 USPS Pre-Sort First-Class Mail
- 4 USPS Regular Standard/Bulk Mail
- 5 USPS Non-Profit Standard/Bulk Mail
- 10 USPS Regular Periodical Mail
- 11 USPS Non-Profit Periodical Mail
- 91 Some other way _____ **(SPECIFY)**
- 92 Some other way _____ **(SPECIFY)**

MAIN QUESTIONNAIRE

We appreciate your willingness to help us. The focus of this research is to understand how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

ONLY DISPLAY APPLICATIONS SELECTED IN S7

Q1 First, during the **PAST 12 months**, how many individual pieces of the following did your organization send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

As I read each area please provide the number of individual pieces your organization has sent during the past 12 months. **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE.**

	Number of Pieces Sent in Past 12 Months (Denomination)	Number of Pieces in Sent in Past 12 Months (Digits)
A. Bills, invoices or statements	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

PROGRAMMING NOTE: THANK AND CONCLUDE INTERVIEW IF DON'T KNOW OR ZERO PIECES SENT FOR ALL APPLICATIONS ASKED ABOUT.

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q1, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q2k Thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent during the **PAST 12 months**, how have you sent them? Have you sent them via ... **(READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.)**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via FCM</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

MUST SELECT CODE 1 – 11 FOR AT LEAST ONE APPLICATION, OTHERWISE THANK AND CONCLUDE

ASK Q3K FOR EACH APPLICATION SELECTED IN S7 AND Q1 > 0 IN Q1 THAT HAS MULTIPLE RESPONSES IN Q2K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q2K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q2K, AUTOPUNCH 100 FOR IT IN Q3K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q3k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent in the **PAST** 12 months, what percent was sent via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Now we would like you to focus on the NEXT 12 months.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 & Q1 > 0

Q4 I am going to read to you the number of pieces you indicated your organization has sent during the past 12 months and I would like for you to tell me in the **NEXT** 12 months, how many individual pieces of each of the following you anticipate your organization will send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

During the past 12 months, you indicated you had sent **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the next 12 months, how many individual pieces do you anticipate your organization will send?

INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Sent in Past 12 Months	Number of Pieces Anticipate Sending in Next 12 Months (Denomination)	Number of Pieces Anticipate Sending in Next 12 Months (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q4, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q5k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, how do you plan to send them? Do you plan to send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q6K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 > 0 THAT HAS MULTIPLE RESPONSES IN Q5K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q5K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q5K, AUTOPUNCH 100 FOR IT IN Q6K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q6k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, what percent will you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

And now we are going to provide a description of a proposed change in service from the USPS.

Despite very aggressive cost cutting, the Postal Service is projecting financial losses for this and the next several years. This is due to a significant decline in mail volume and a major requirement to prefund its retiree's health benefits. The Postal Service is committed to fulfilling its fundamental role as a deliverer of mail and packages to all Americans. To accomplish this, the Postal Service is developing a plan to transition from six- to five-day delivery on a national basis. This will remove delivery costs and help bring the financial picture into better balance.

The key components to the 5-Day plan are as follows:

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.
- Mail will continue to be delivered to PO Box addresses **[IF Q2 = 3, 4, 5, 10 OR 11, ADD: (including PO Boxes, Caller Service and National Firm Holdouts)]** Monday - Saturday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Remittance mail that is picked up at a plant on Saturday and/or Sunday will continue to be picked up on those days.
- Post Offices will remain open on Saturday.
- No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Bulk mail entry units will be closed on Saturday. However, Detached Mail Units currently open on Saturday and/or Sunday will remain open. Mail will continue to be accepted and verified at DMUs on Saturday and/or Sunday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Destinating entry bulk mail can continue to be drop shipped at plants on Saturday and Sunday and at delivery units on Saturday. However, time slots for dropping the mail will be shortened. Mail dropped shipped at a plant on Saturday or Sunday will be processed on Monday. Standard Mail dropped shipped at a delivery unit on Saturday will be delivered by Tuesday.
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
- Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.

Q10k If the service change described does happen, what is the likelihood that this change would cause your organization to modify the number of individual pieces of mail and/or packages your organization sends or the way you send it? Please answer using a scale from 0 to 10, where “10” means extremely likely and a “0” means extremely unlikely.

10	Extremely likely
9	
8	
7	
6	
5	
4	
3	
2	
1	
0	Extremely unlikely

IF Q10 = 0, THEN SKIP TO Q11

For the next several questions, please answer based on the assumption that the changes described would happen.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0

Q7 Now I am going to read to you the number of pieces you said your organization will send in the next 12 months and I would like for you to tell me in the first 12 months after the change in service is implemented, how many individual pieces of each of the following do you anticipate your organization would send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

In the next 12 months you indicated your organization will send **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the first 12 months after the change in service is implemented, how many individual pieces do you anticipate your organization will send? **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION**

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Anticipate Sending in Next 12 Months	Number of Pieces Anticipate Sending After Change in Service (Denomination)	Number of Pieces Anticipate Sending After Change in Service (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q7, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 USE THIS TEXT

Q8k Thinking about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change is implemented, how do you think you would send them? Would you send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q9K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 THAT HAS MULTIPLE RESPONSES IN Q8K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q8K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q8K, AUTOPUNCH 100 FOR IT IN Q9K.

ONLY DISPLAY APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 AND USE THIS TEXT

Q9k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change in service is implemented, what percent would you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
		TOTAL = 100%

Q11 Does your firm currently have a Post Office Box, or do you have plans to get one?

- 1 Currently have one
- 2 Have plans to get one
- 3 Neither have one nor plan to get one

IF Q11 = CODE 3, THEN ASK Q12

Q12 If the change in USPS service is implemented, do you anticipate that your firm would get a Post Office Box?

- 1 Yes
- 2 No

CLOSING

Q24 Those are all the research questions we have for you today. As a token of our appreciation for participating, we will be sending you a \$50 gift card for Amazon.com.

- 1 I accept the Amazon.com gift card
- 2 I decline or cannot accept the Amazon.com gift card.

IF Q24 = CODE 1, THEN ASK Q25A

Q25a What e-mail address would you like to have the gift card sent?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = CODE 1, THEN ASK Q25B

Q25b And I would just like to confirm that I entered your e-mail address correctly. Is it **(INSERT E-MAIL ADDRESS FROM Q25A)**?

- 1 Yes, that is correct
- 2 No, that is not correct

IF Q25B = CODE 2, THEN ASK Q25C

Q25c And what is the correct e-mail address?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = 1, THEN DISPLAY:

Thank you again for participating in this important research study. The gift card will be emailed sometime in November when the study is completed.

IF Q24 = 2, THEN DISPLAY:

Thank you again for participating in this important research study.

Part 4: Small Business

USPS 5-Day Delivery Research - Questionnaire: National Accounts -

NOTE: DIRECTIONS IN BOLD UPPER CASE ARE PROGRAMMER INSTRUCTIONS; THESE INSTRUCTIONS WILL NOT BE SHOWN TO INTERVIEWERS OR RESPONDENTS. THE PROGRAMMER WILL ENSURE THAT ONLY THE APPLICABLE QUESTIONS/RESPONSES WILL BE SHOWN TO EACH RESPONDENT, BASED ON THEIR SEGMENT AND THEIR PRIOR RESPONSES.

INTRODUCTION

Hello, my name is _____ calling from Opinion Research Corporation on behalf of the United States Postal Service. May I please speak with the person who makes decisions and/or recommendations on how to send your organizations mail and packages?

- 1 CONNECTING (**CONTINUE**)
- 2 RESPONDENT NOT AVAILABLE (**SCHEDULE CALLBACK**)
- 3 DOES NOT SEND MAIL/PACKAGES (**THANK AND CONCLUDE**)
- 4 REFUSED (**THANK AND CONCLUDE**)
- 5 REQUESTS INFORMATIONAL E-MAIL TO BE SENT (**SCHEDULE CALLBACK**)
- 6 REQUESTS INFORMATIONAL FAX TO BE SENT (**SCHEDULE CALLBACK**)

Hello, my name is _____ calling from Opinion Research Corporation. We have been commissioned by the United States Postal Service to contact organizations nationwide to obtain feedback on how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

First, I have a few questions to ask you to see if you qualify. If you do, the survey will take less than 10 minutes to complete. We know your time is very valuable, so we are offering a \$50 gift card as a token of our appreciation for completing the survey.

- 1 ALLOWS YOU TO CONTINUE (**CONTINUE**)
- 2 RESPONDENT NOT AVAILABLE AT THIS TIME (**SCHEDULE CALLBACK**)
- 3 REFERRAL PROVIDED (**OBTAIN NAME AND PHONE NUMBER, ASK TO BE TRANSFERRED AND START OVER**)
- 4 DOES NOT SEND MAIL (**THANK AND CONCLUDE**)
- 5 REFUSED (**THANK AND CONCLUDE**)
- 6 REQUESTS INFORMATIONAL E-MAIL TO BE SENT (**SCHEDULE CALLBACK**)
- 7 REQUESTS INFORMATIONAL FAX TO BE SENT (**SCHEDULE CALLBACK**)

S2A Are you the person in your business that is primarily responsible for deciding how to send your business' mail and/or packages?

- 1 Yes (**CONTINUE**)
- 2 No (**ASK TO SPEAK WITH PERSON WHO IS RESPONSIBLE AND START OVER**)

S3 Do you or any close family members work in ...

- 1 Advertising or Public Relations **(THANK AND CONCLUDE)**
- 2 Market Research **(THANK AND CONCLUDE)**
- 3 Mail or Small Package Delivery **(THANK AND CONCLUDE)**
- 4 None of the above **(CONTINUE)**

S4 Which of the following best describes your organization's primary industry?

- 1 Agriculture, Forestry, and Fishing
- 2 Mining
- 3 Construction
- 4 Manufacturing
- 5 Transportation
- 6 Telecommunications
- 7 Utilities
- 8 Wholesale Trade
- 9 Retail Trade or Mail Order
- 10 Finance, Insurance, or Real Estate
- 11 Publishing
- 12 Services (including non-profit organizations or membership organizations)
- 13 Government or Public Administration
- 95 Some other industry _____ **(SPECIFY)**

S5 Including yourself, how many people are employed by your company at your location?

_____ **(RECORD NUMBER OF EMPLOYEES 1 – 9999)**

For the remainder of the survey, please think only about the mail or package applications you are responsible for.

S7 For which of the following mail or package applications do you have responsibility? **(READ LIST 1 – 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.) (RANDOMIZE CODES 1 – 7)**

- 1 Bills, invoices or statements
- 2 Payments
- 3 Advertising or marketing materials including flyers, circulars, catalogs, etc.
- 4 General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.
- 5 Periodicals or newspapers
- 6 Packages
- 7 Newsletters
- 91 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 92 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 97 None of the above **(THANK AND CONCLUDE)**
- 98 Don't know **(THANK AND CONCLUDE)**

IF S7 = CODE 7, THEN ASK S7A

S7a How do you send your newsletters? Do you send them via ...

- 2 USPS Single Piece First-Class Mail
- 3 USPS Pre-Sort First-Class Mail
- 4 USPS Regular Standard/Bulk Mail
- 5 USPS Non-Profit Standard/Bulk Mail
- 10 USPS Regular Periodical Mail
- 11 USPS Non-Profit Periodical Mail
- 91 Some other way _____ (SPECIFY)
- 92 Some other way _____ (SPECIFY)

MAIN QUESTIONNAIRE

We appreciate your willingness to help us. The focus of this research is to understand how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

ONLY DISPLAY APPLICATIONS SELECTED IN S7

Q1 First, during the **PAST 12 months**, how many individual pieces of the following did your organization send? (**RANDOMIZE A – J IN THE SAME ORDER AS S7**)

As I read each area please provide the number of individual pieces your organization has sent during the past 12 months. **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE.**

	Number of Pieces Sent in Past 12 Months (Denomination)	Number of Pieces in Sent in Past 12 Months (Digits)
A. Bills, invoices or statements	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

PROGRAMMING NOTE: THANK AND CONCLUDE INTERVIEW IF DON'T KNOW OR ZERO PIECES SENT FOR ALL APPLICATIONS ASKED ABOUT.

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q1, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q2k Thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent during the **PAST 12 months**, how have you sent them? Have you sent them via ... **(READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.)**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via FCM</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

MUST SELECT CODE 1 – 11 FOR AT LEAST ONE APPLICATION, OTHERWISE THANK AND CONCLUDE

ASK Q3K FOR EACH APPLICATION SELECTED IN S7 AND Q1 > 0 IN Q1 THAT HAS MULTIPLE RESPONSES IN Q2K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q2K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q2K, AUTOPUNCH 100 FOR IT IN Q3K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q3k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent in the **PAST** 12 months, what percent was sent via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Now we would like you to focus on the NEXT 12 months.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 & Q1 > 0

Q4 I am going to read to you the number of pieces you indicated your organization has sent during the past 12 months and I would like for you to tell me in the **NEXT** 12 months, how many individual pieces of each of the following you anticipate your organization will send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

During the past 12 months, you indicated you had sent **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the next 12 months, how many individual pieces do you anticipate your organization will send?

INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Sent in Past 12 Months	Number of Pieces Anticipate Sending in Next 12 Months (Denomination)	Number of Pieces Anticipate Sending in Next 12 Months (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q4, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q5k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, how do you plan to send them? Do you plan to send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q6K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 > 0 THAT HAS MULTIPLE RESPONSES IN Q5K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q5K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q5K, AUTOPUNCH 100 FOR IT IN Q6K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q6k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, what percent will you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

And now we are going to provide a description of a proposed change in service from the USPS.

Despite very aggressive cost cutting, the Postal Service is projecting financial losses for this and the next several years. This is due to a significant decline in mail volume and a major requirement to prefund its retiree's health benefits. The Postal Service is committed to fulfilling its fundamental role as a deliverer of mail and packages to all Americans. To accomplish this, the Postal Service is developing a plan to transition from six- to five-day delivery on a national basis. This will remove delivery costs and help bring the financial picture into better balance.

The key components to the 5-Day plan are as follows:

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.
- Mail will continue to be delivered to PO Box addresses **[IF Q2 = 3, 4, 5, 10 OR 11, ADD: (including PO Boxes, Caller Service and National Firm Holdouts)]** Monday - Saturday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Remittance mail that is picked up at a plant on Saturday and/or Sunday will continue to be picked up on those days.
- Post Offices will remain open on Saturday.
- No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Bulk mail entry units will be closed on Saturday. However, Detached Mail Units currently open on Saturday and/or Sunday will remain open. Mail will continue to be accepted and verified at DMUs on Saturday and/or Sunday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Destinating entry bulk mail can continue to be drop shipped at plants on Saturday and Sunday and at delivery units on Saturday. However, time slots for dropping the mail will be shortened. Mail dropped shipped at a plant on Saturday or Sunday will be processed on Monday. Standard Mail dropped shipped at a delivery unit on Saturday will be delivered by Tuesday.
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
- Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.

Q10k If the service change described does happen, what is the likelihood that this change would cause your organization to modify the number of individual pieces of mail and/or packages your organization sends or the way you send it? Please answer using a scale from 0 to 10, where “10” means extremely likely and a “0” means extremely unlikely.

10 Extremely likely
 9
 8
 7
 6
 5
 4
 3
 2
 1
 0 Extremely unlikely

IF Q10 = 0, THEN SKIP TO Q11

For the next several questions, please answer based on the assumption that the changes described would happen.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0

Q7 Now I am going to read to you the number of pieces you said your organization will send in the next 12 months and I would like for you to tell me in the first 12 months after the change in service is implemented, how many individual pieces of each of the following do you anticipate your organization would send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

In the next 12 months you indicated your organization will send **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the first 12 months after the change in service is implemented, how many individual pieces do you anticipate your organization will send? **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION**

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Anticipate Sending in Next 12 Months	Number of Pieces Anticipate Sending After Change in Service (Denomination)	Number of Pieces Anticipate Sending After Change in Service (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q7, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 USE THIS TEXT

Q8k Thinking about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change is implemented, how do you think you would send them? Would you send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q9K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 THAT HAS MULTIPLE RESPONSES IN Q8K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q8K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q8K, AUTOPUNCH 100 FOR IT IN Q9K.

ONLY DISPLAY APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 AND USE THIS TEXT

Q9k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change in service is implemented, what percent would you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Q11 Does your firm currently have a Post Office Box, or do you have plans to get one?

- 1 Currently have one
- 2 Have plans to get one
- 3 Neither have one nor plan to get one

IF Q11 = CODE 3, THEN ASK Q12

Q12 If the change in USPS service is implemented, do you anticipate that your firm would get a Post Office Box?

- 1 Yes
- 2 No

CLOSING

Q24 Those are all the research questions we have for you today. As a token of our appreciation for participating, we will be sending you a \$50 gift card for Amazon.com.

- 1 I accept the Amazon.com gift card
- 2 I decline or cannot accept the Amazon.com gift card.

IF Q24 = CODE 1, THEN ASK Q25A

Q25a What e-mail address would you like to have the gift card sent?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = CODE 1, THEN ASK Q25B

Q25b And I would just like to confirm that I entered your e-mail address correctly. Is it **(INSERT E-MAIL ADDRESS FROM Q25A)**?

- 1 Yes, that is correct
- 2 No, that is not correct

IF Q25B = CODE 2, THEN ASK Q25C

Q25c And what is the correct e-mail address?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = 1, THEN DISPLAY:

Thank you again for participating in this important research study. The gift card will be emailed sometime in November when the study is completed.

IF Q24 = 2, THEN DISPLAY:

Thank you again for participating in this important research study.

Appendix F: Consumer Questionnaire

USPS 5-Day Delivery Research - Questionnaire: National Accounts -

NOTE: DIRECTIONS IN BOLD UPPER CASE ARE PROGRAMMER INSTRUCTIONS; THESE INSTRUCTIONS WILL NOT BE SHOWN TO INTERVIEWERS OR RESPONDENTS. THE PROGRAMMER WILL ENSURE THAT ONLY THE APPLICABLE QUESTIONS/RESPONSES WILL BE SHOWN TO EACH RESPONDENT, BASED ON THEIR SEGMENT AND THEIR PRIOR RESPONSES.

INTRODUCTION

Hello, my name is _____ calling from Opinion Research Corporation on behalf of the United States Postal Service. May I please speak with the person who makes decisions and/or recommendations on how to send your organizations mail and packages?

- 1 CONNECTING (**CONTINUE**)
- 2 RESPONDENT NOT AVAILABLE (**SCHEDULE CALLBACK**)
- 3 DOES NOT SEND MAIL/PACKAGES (**THANK AND CONCLUDE**)
- 4 REFUSED (**THANK AND CONCLUDE**)
- 5 REQUESTS INFORMATIONAL E-MAIL TO BE SENT (**SCHEDULE CALLBACK**)
- 6 REQUESTS INFORMATIONAL FAX TO BE SENT (**SCHEDULE CALLBACK**)

Hello, my name is _____ calling from Opinion Research Corporation. We have been commissioned by the United States Postal Service to contact organizations nationwide to obtain feedback on how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

First, I have a few questions to ask you to see if you qualify. If you do, the survey will take less than 10 minutes to complete. We know your time is very valuable, so we are offering a \$50 gift card as a token of our appreciation for completing the survey.

- 1 ALLOWS YOU TO CONTINUE (**CONTINUE**)
- 2 RESPONDENT NOT AVAILABLE AT THIS TIME (**SCHEDULE CALLBACK**)
- 3 REFERRAL PROVIDED (**OBTAIN NAME AND PHONE NUMBER, ASK TO BE TRANSFERRED AND START OVER**)
- 4 DOES NOT SEND MAIL (**THANK AND CONCLUDE**)
- 5 REFUSED (**THANK AND CONCLUDE**)
- 6 REQUESTS INFORMATIONAL E-MAIL TO BE SENT (**SCHEDULE CALLBACK**)
- 7 REQUESTS INFORMATIONAL FAX TO BE SENT (**SCHEDULE CALLBACK**)

S2A Are you the person in your business that is primarily responsible for deciding how to send your business' mail and/or packages?

- 1 Yes (**CONTINUE**)
- 2 No (**ASK TO SPEAK WITH PERSON WHO IS RESPONSIBLE AND START OVER**)

S3 Do you or any close family members work in ...

- 1 Advertising or Public Relations **(THANK AND CONCLUDE)**
- 2 Market Research **(THANK AND CONCLUDE)**
- 3 Mail or Small Package Delivery **(THANK AND CONCLUDE)**
- 4 None of the above **(CONTINUE)**

S4 Which of the following best describes your organization's primary industry?

- 1 Agriculture, Forestry, and Fishing
- 2 Mining
- 3 Construction
- 4 Manufacturing
- 5 Transportation
- 6 Telecommunications
- 7 Utilities
- 8 Wholesale Trade
- 9 Retail Trade or Mail Order
- 10 Finance, Insurance, or Real Estate
- 11 Publishing
- 12 Services (including non-profit organizations or membership organizations)
- 13 Government or Public Administration
- 95 Some other industry _____ **(SPECIFY)**

S5 Including yourself, how many people are employed by your company at your location?

_____ **(RECORD NUMBER OF EMPLOYEES 1 – 9999)**

For the remainder of the survey, please think only about the mail or package applications you are responsible for.

S7 For which of the following mail or package applications do you have responsibility? **(READ LIST 1 – 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.) (RANDOMIZE CODES 1 – 7)**

- 1 Bills, invoices or statements
- 2 Payments
- 3 Advertising or marketing materials including flyers, circulars, catalogs, etc.
- 4 General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.
- 5 Periodicals or newspapers
- 6 Packages
- 7 Newsletters
- 91 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 92 Some other type _____ **(SPECIFY) (IF ONLY RESPONSE, THANK AND CONCLUDE)**
- 97 None of the above **(THANK AND CONCLUDE)**
- 98 Don't know **(THANK AND CONCLUDE)**

IF S7 = CODE 7, THEN ASK S7A

S7a How do you send your newsletters? Do you send them via ...

- 2 USPS Single Piece First-Class Mail
- 3 USPS Pre-Sort First-Class Mail
- 4 USPS Regular Standard/Bulk Mail
- 5 USPS Non-Profit Standard/Bulk Mail
- 10 USPS Regular Periodical Mail
- 11 USPS Non-Profit Periodical Mail
- 91 Some other way _____ **(SPECIFY)**
- 92 Some other way _____ **(SPECIFY)**

MAIN QUESTIONNAIRE

We appreciate your willingness to help us. The focus of this research is to understand how organizations may react to potential changes in USPS services. Your feedback will help ensure that your voice is heard on this very important subject.

ONLY DISPLAY APPLICATIONS SELECTED IN S7

Q1 First, during the **PAST 12 months**, how many individual pieces of the following did your organization send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

As I read each area please provide the number of individual pieces your organization has sent during the past 12 months. **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE.**

	Number of Pieces Sent in Past 12 Months (Denomination)	Number of Pieces in Sent in Past 12 Months (Digits)
A. Bills, invoices or statements	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

PROGRAMMING NOTE: THANK AND CONCLUDE INTERVIEW IF DON'T KNOW OR ZERO PIECES SENT FOR ALL APPLICATIONS ASKED ABOUT.

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q1, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q2k Thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent during the **PAST 12 months**, how have you sent them? Have you sent them via ... **(READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.)**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via FCM</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

MUST SELECT CODE 1 – 11 FOR AT LEAST ONE APPLICATION, OTHERWISE THANK AND CONCLUDE

ASK Q3K FOR EACH APPLICATION SELECTED IN S7 AND Q1 > 0 IN Q1 THAT HAS MULTIPLE RESPONSES IN Q2K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q2K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q2K, AUTOPUNCH 100 FOR IT IN Q3K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 > 0 AND USE THIS TEXT

Q3k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** your organization has sent in the **PAST** 12 months, what percent was sent via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Now we would like you to focus on the NEXT 12 months.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 & Q1 > 0

Q4 I am going to read to you the number of pieces you indicated your organization has sent during the past 12 months and I would like for you to tell me in the **NEXT** 12 months, how many individual pieces of each of the following you anticipate your organization will send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

During the past 12 months, you indicated you had sent **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the next 12 months, how many individual pieces do you anticipate your organization will send?
INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Sent in Past 12 Months	Number of Pieces Anticipate Sending in Next 12 Months (Denomination)	Number of Pieces Anticipate Sending in Next 12 Months (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q1	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q4, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q5k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, how do you plan to send them? Do you plan to send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS.]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q6K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 > 0 THAT HAS MULTIPLE RESPONSES IN Q5K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q5K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q5K, AUTOPUNCH 100 FOR IT IN Q6K.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0 AND USE THIS TEXT

Q6k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization will send in the **NEXT 12 months**, what percent will you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

And now we are going to provide a description of a proposed change in service from the USPS.

Despite very aggressive cost cutting, the Postal Service is projecting financial losses for this and the next several years. This is due to a significant decline in mail volume and a major requirement to prefund its retiree's health benefits. The Postal Service is committed to fulfilling its fundamental role as a deliverer of mail and packages to all Americans. To accomplish this, the Postal Service is developing a plan to transition from six- to five-day delivery on a national basis. This will remove delivery costs and help bring the financial picture into better balance.

The key components to the 5-Day plan are as follows:

- No Saturday delivery of mail to homes and businesses. Delivery of mail will be Monday – Friday only.
- Mail will continue to be delivered to PO Box addresses **[IF Q2 = 3, 4, 5, 10 OR 11, ADD: (including PO Boxes, Caller Service and National Firm Holdouts)]** Monday - Saturday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Remittance mail that is picked up at a plant on Saturday and/or Sunday will continue to be picked up on those days.
- Post Offices will remain open on Saturday.
- No mail collected from street addresses, businesses, collection boxes, or Post Offices on Saturday. Mail dropped off at a Post Office or in a collection box after the last Friday scheduled pickup time will be collected and processed on Monday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Bulk mail entry units will be closed on Saturday. However, Detached Mail Units currently open on Saturday and/or Sunday will remain open. Mail will continue to be accepted and verified at DMUs on Saturday and/or Sunday.
- **[IF Q2 = 3, 4, 5, 10 OR 11, ADD]** Destinating entry bulk mail can continue to be drop shipped at plants on Saturday and Sunday and at delivery units on Saturday. However, time slots for dropping the mail will be shortened. Mail dropped shipped at a plant on Saturday or Sunday will be processed on Monday. Standard Mail dropped shipped at a delivery unit on Saturday will be delivered by Tuesday.
- Elimination of Saturday collection, processing and delivery will generally add a day to the delivery of mail that is currently collected and processed or scheduled to be delivered on Saturday.
- Express Mail will continue to be delivered 7 days a week. Express Mail will continue to be accepted and processed on Saturday at Post Offices. However, there will be no carrier pickup of Express or Priority Mail on Saturday.

Q10k If the service change described does happen, what is the likelihood that this change would cause your organization to modify the number of individual pieces of mail and/or packages your organization sends or the way you send it? Please answer using a scale from 0 to 10, where “10” means extremely likely and a “0” means extremely unlikely.

10	Extremely likely
9	
8	
7	
6	
5	
4	
3	
2	
1	
0	Extremely unlikely

IF Q10 = 0, THEN SKIP TO Q11

For the next several questions, please answer based on the assumption that the changes described would happen.

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 > 0

Q7 Now I am going to read to you the number of pieces you said your organization will send in the next 12 months and I would like for you to tell me in the first 12 months after the change in service is implemented, how many individual pieces of each of the following do you anticipate your organization would send? **(RANDOMIZE A – J IN THE SAME ORDER AS S7)**

In the next 12 months you indicated your organization will send **(INSERT NUMBER OF INDIVIDUAL PIECES AND TYPE OF MAIL/PACKAGE APPLICATIONS)**.

In the first 12 months after the change in service is implemented, how many individual pieces do you anticipate your organization will send? **INTERVIEWER NOTE: SELECT THE DENOMINATION FIRST AND THEN INSERT THE VALUE UP TO 3 DIGITS – ONE OF THE DIGITS CAN BE A DECIMAL – EXAMPLE – 1.5 MILLION – SELECT CODE 4 AND THEN INSERT 1.5 AS THE VALUE. REPEAT FOR EACH APPLICATION**

PROGRAMMING NOTE: WHEN INSERTING RESPONSE FROM Q1, INSERT DIGITS FIRST AND THEN DENOMINATION SECOND (I.E., 100 MILLION OR 225 THOUSAND)

	Number of Pieces Anticipate Sending in Next 12 Months	Number of Pieces Anticipate Sending After Change in Service (Denomination)	Number of Pieces Anticipate Sending After Change in Service (Digits)
A. Bills, invoices or statements	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
B. Payments	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
C. Advertising or marketing materials including flyers, circulars, catalogs, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc.	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
E. Periodicals or newspapers	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
F. Packages	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
G. Newsletters	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
I. INSERT CODE 91 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)
J. INSERT CODE 92 FROM S7	INSERT RESPONSE FROM Q4	1 999 or Less 2 Hundred 3 Thousand 4 Million 5 Billion 98 Don't Know	_____ (RECORD NUMBER UP TO 3 DIGITS)

IF DON'T KNOW OR ZERO PIECES SENT FOR AN APPLICATION IN Q7, DO NOT ASK ABOUT THAT APPLICATION FOR THE REMAINDER OF THE SURVEY

ONLY DISPLAY APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 USE THIS TEXT

Q8k Thinking about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change is implemented, how do you think you would send them? Would you send them via ... **[READ LIST 1 - 91. WAIT FOR YES OR NO FOR EACH. ENTER ALL MENTIONS]**

Application	Products Displayed
A. Bills, invoices or statements	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 17 Online billing, invoicing or statement presentation 18 UPS and/or FedEx 91 Some other way 92 Some other way
B. Payments	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 15 Online bill payment 16 Automated payment from checking account or credit card 18 UPS and/or FedEx 91 Some other way 92 Some other way
C. Advertising or marketing materials including flyers, circulars, catalogs, etc. Or G. Respondents Who Send Newsletters Via SM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 4 USPS Regular Standard/Bulk Mail 5 USPS Non-Profit Standard/Bulk Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way
D. General communications including customer notifications, holiday cards, investor/shareholder mailings, etc. Or G. Respondents Who Send Newsletters Via FCM	2 USPS Single Piece First-Class Mail 3 USPS Pre-Sort First-Class Mail 6 USPS Priority Mail 7 USPS Express Mail 14 Email 18 UPS and/or FedEx 91 Some other way 92 Some other way

<p>E. Periodicals or newspapers</p> <p>Or</p> <p>G. Respondents Who Send Newsletters Via Periodical Mail</p>	<p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>F. Packages</p>	<p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>I. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>
<p>J. Other</p>	<p>2 USPS Single Piece First-Class Mail</p> <p>3 USPS Pre-Sort First-Class Mail</p> <p>4 USPS Regular Standard/Bulk Mail</p> <p>5 USPS Non-Profit Standard/Bulk Mail</p> <p>6 USPS Priority Mail</p> <p>7 USPS Express Mail</p> <p>8 USPS Parcel Select</p> <p>9 USPS Parcel Post</p> <p>10 USPS Regular Periodical Mail</p> <p>11 USPS Non-Profit Periodical Mail</p> <p>14 Email</p> <p>18 UPS and/or FedEx</p> <p>91 Some other way</p> <p>92 Some other way</p>

ASK Q9K FOR EACH APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 THAT HAS MULTIPLE RESPONSES IN Q8K. ONLY SHOW PRODUCTS/SERVICES MENTIONED FOR THAT APPLICATION IN Q8K. IF AN APPLICATION HAS EXACTLY ONE RESPONSE IN Q8K, AUTOPUNCH 100 FOR IT IN Q9K.

ONLY DISPLAY APPLICATION SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0 AND USE THIS TEXT

Q9k Again thinking just about the **(INSERT APPLICATIONS SELECTED IN S7 AND Q1 AND Q4 AND Q7 > 0. RANDOMIZE APPLICATIONS IN THE SAME ORDER AS S7)** you anticipate your organization would send after the change in service is implemented, what percent would you send via ... **[READ LIST]**

INTERVIEWER NOTE: THE TOTALS SHOULD EQUAL 100%

a. USPS First-Class Mail	_____	(RECORD PERCENT 1 – 100)
b. USPS Single Piece First-Class Mail	_____	(RECORD PERCENT 1 – 100)
c. USPS Pre-Sort First-Class Mail	_____	(RECORD PERCENT 1 – 100)
d. USPS Regular Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
e. USPS Non-Profit Standard/Bulk Mail	_____	(RECORD PERCENT 1 – 100)
f. USPS Priority Mail	_____	(RECORD PERCENT 1 – 100)
g. USPS Express Mail	_____	(RECORD PERCENT 1 – 100)
h. USPS Parcel Select	_____	(RECORD PERCENT 1 – 100)
i. USPS Parcel Post	_____	(RECORD PERCENT 1 – 100)
j. USPS Regular Periodical Mail	_____	(RECORD PERCENT 1 – 100)
k. USPS Non-Profit Periodical Mail	_____	(RECORD PERCENT 1 – 100)
n. Email	_____	(RECORD PERCENT 1 – 100)
o. Online bill payment	_____	(RECORD PERCENT 1 – 100)
p. Automated payment	_____	(RECORD PERCENT 1 – 100)
q. Online billing, invoicing or statement presentation	_____	(RECORD PERCENT 1 – 100)
r. INSERT CODE 91 FROM Q2	_____	(RECORD PERCENT 1 – 100)
s. INSERT CODE 92 FROM Q2	_____	(RECORD PERCENT 1 – 100)
t. UPS and/or FedEx	_____	(RECORD PERCENT 1 – 100)
TOTAL = 100%		

Q11 Does your firm currently have a Post Office Box, or do you have plans to get one?

- 1 Currently have one
- 2 Have plans to get one
- 3 Neither have one nor plan to get one

IF Q11 = CODE 3, THEN ASK Q12

Q12 If the change in USPS service is implemented, do you anticipate that your firm would get a Post Office Box?

- 1 Yes
- 2 No

CLOSING

Q24 Those are all the research questions we have for you today. As a token of our appreciation for participating, we will be sending you a \$50 gift card for Amazon.com.

- 1 I accept the Amazon.com gift card
- 2 I decline or cannot accept the Amazon.com gift card.

IF Q24 = CODE 1, THEN ASK Q25A

Q25a What e-mail address would you like to have the gift card sent?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = CODE 1, THEN ASK Q25B

Q25b And I would just like to confirm that I entered your e-mail address correctly. Is it **(INSERT E-MAIL ADDRESS FROM Q25A)**?

- 1 Yes, that is correct
- 2 No, that is not correct

IF Q25B = CODE 2, THEN ASK Q25C

Q25c And what is the correct e-mail address?

_____ (RECORD E-MAIL ADDRESS)

IF Q24 = 1, THEN DISPLAY:

Thank you again for participating in this important research study. The gift card will be emailed sometime in November when the study is completed.

IF Q24 = 2, THEN DISPLAY:

Thank you again for participating in this important research study.

Appendix G: CARAVAN[®] Sampling and Weighting Methodologies

All CARAVAN interviews are conducted using Opinion Research Corporation's computer assisted telephone interviewing (CATI) system. The system is state-of-the-art and offers several distinct advantages such as: full-screen control which allows multi-question screens, fully-programmable help and objection screens to aid interviewing, an extremely flexible telephone number management system and powerful data checking facilities. CATI ensures that interviews are conducted in the most efficient manner and allows interviewers easy response recording. This interviewing method also allows for the most accurate form of data entry by guiding the interviewer through the programmed question flow and by providing on-screen interviewer instructions.

Sampling

The CARAVAN landline-cell combined sample is a dual frame sampling design. This means that the sample is drawn from two independent sampling frames—one for landlines and one for cell phones. Each sample, a form of random-digit dial sampling is produced independently. This design reduces the potential of coverage bias by combining a non-overlapping cell phone based sampling frame to complement a traditional Random Digit Dial (RDD) (landline) telephone sample.

Land Line Sample

ORC Random Digit Dial telephone (US landline) sample is generated using a list-assisted methodology. This method gets its name in that the updated white page listings that are used to identify banks (the first 8 digits of the phone number) with a listed phone number in them. The standard that we use is 2+, meaning that a bank needs to have 2 or more listed households to be considered working. We use the Genesys Sampling in-house system to generate list-assisted Random Digit Dialing sample. This allows us to vary the listed household threshold to the 1+, 2+ or 3+ bank sizes.

The standard GENESYS RDD methodology produces a strict single stage, epsem sample of residential telephone numbers. In other words, a GENESYS RDD sample ensures an equal and known probability of selection for every residential telephone number in the sample frame.

The GENESYS RDD methodology utilizes an unrestricted random sampling process within implicit sampling intervals. Operationally, the number of intervals, or implicit strata, is equal to the total RDD sample size desired.

For example, let's say a hypothetical sample frame contains 110 area code/exchange combinations, and of the 11,000 (110 x 100) possible two-digit (hundred series) banks, 60%, or 6600, are working. If we need a sample of 1000 random telephone numbers, the GENESYS process would proceed as follows:

Compute the implicit interval/size (C).

$$C = M \times 100 / N$$

Where: C = the interval size

M = the number of "working banks" in the defined sample frame.

N = the RDD sample size.

Using the numbers from our example, $C = 6600 \times 100 / 10000C = 660$

Generate a random number between 1 and C (660 using our hypothetical numbers).

Identify the actual telephone number associated with that random number. This is accomplished by dividing the random number by 100 and adding one to the non-decimal portion. This identifies the sequential area code/exchange working bank combination, while the last two digits of the random number represent the actual random two-digit suffix.

Return to step 2 and generate a random number for the next interval (i.e., between 661 and 1320). Steps 2 through 4 are repeated until the sample file is exhausted.

Cell Phone sample

The cell phone sample was produced by SSI, Inc., a leading provider of survey sampling to the research community.

SSI starts with the most recent monthly Telcordia TPM (Terminating Point Master) Data file. This is Telcordia's master file of NPA-NXX and Block-ID records for the North American Number Plan. It contains at least one record per NPA-NXX. For prefixes (NPA-NXXs) where 1000-block number pooling is in effect, this file also provides information for individual 1000-blocks. This allows users to identify those 1000-blocks that have either not been assigned for service or that have been allocated to different service providers.

This file is then further expanded to a file of 100- blocks, 10 100-block records per 1000-block containing the same information as the 1000-block record. "Mixed" or "shared" 100-blocks are then compared to SSI's list-assisted RDD database. 100-blocks with no listed numbers are retained in the wireless frame and 100-blocks containing listed numbers on the RDD frame are removed. The result is a frame of 100-blocks that is mutually exclusive of SSI's list-assisted RDD frame while allowing coverage in prefixes and 1000-blocks that potentially provide both landline and wireless Service

The file of 100-blocks is sorted by FIPS Code, Carrier name and 100-block. The intent is to provide a stratification that will yield a sample that is representative both geographically and by large and small carrier. A sampling interval is determined by dividing the universe of eligible 100-blocks by the desired sample size. From a random start within the first sampling interval, a systematic nth selection of 100-blocks is performed and a 2-digit random number between 00 and 99 is appended to each selected 100-block stem.

Weighting

In probability-based samples such as CARAVAN®, the basis of the weighting is the inverse of the selection probability. Then, weighting adjustments are frequently used to reduce the potential for biases that may be present due to incomplete frame coverage and survey nonresponse--both inherent in all telephone surveys. These adjustments may take advantage of geographic, demographic, and socioeconomic information that are known for the population as well as measured in the sample surveys. The adjustments reduce potential bias to the extent that the survey respondents and nonrespondents (noncontacts, refusals, etc.) with similar geographic, demographic, and socioeconomic characteristics are also similar with respect to the survey statistics of interest. In other words, post-survey

weighting adjustments reduce bias if the weighting variables are related to (correlated with) the survey measures and the likelihood of survey participation.

For CARAVAN (landline), the post survey weighting adjustments leverage population-based estimates as reported by the Current Population Survey (CPS). This form of weighting is referred to as *calibration weighting*² in that survey respondents are assigned weights that are calibrated to reflect the population. The calibration weighting for CARAVAN is based on an iterative series of ratio adjustments called iterative proportional fitting, or *raking*³, which was first introduced by Deming and Stephan in for use in the 1940 US census. For CARAVAN, the ratio adjustments calibrate the survey data to the population for age, sex, race/Hispanic origin, and Census region.

The CARAVAN landline-cell combined sample is a dual frame sampling design. This means that the sample is drawn from two independent sampling frames—one for landlines and one for cell phones. Adults with a landline but no cell phone (A) must be reached through a landline telephone sample. Adults with a cell phone and no landline (C) must be reached through the cell phone sample. Adults with both a landline and a cell phone (B) can be reached through either of the frames. Sampling from the two frames results in these four groups:

a_1 : Landline respondents without a cell phone (landline only)

b_1 : Landline respondents with a cell phone (dual user)

b_2 : Cell phone respondents with a landline (dual user)

c_2 : Cell phone respondents without a landline (cell only)

² For a summary of calibration weighting, refer to Kalton, G. and I. Flores-Cervantes (2003) “Weighting Methods”, *Journal of Official Statistics*.

³Deming, W. E. and F. F. Stephan (1940) “On a Least Squares Adjustment of a Sampled Frequency Table When the Expected Marginal Totals are Known,” *Annals of Mathematical Statistics*.

The dual user groups (b_1 , b_2) are further classified into three subgroups:

Landline mostly: those who receive calls on both regularly (b_{12} , b_{22}),

True dual: those who receive most calls on landline (b_{11} , b_{21}), and

Cell mostly: those who receive most calls on cell phone (b_{13} , b_{23}).

The National Health Interview Survey (NHIS) provides estimates of the five user group populations. The NHIS is an in-person survey conducted by the National Center for Health Statistics (NCHS). We weight-adjust the landline sample and the cell sample to their respective population estimates from the NHIS.

Since the dual user groups are represented by the landline sample and cell phone sample, we combine these groups based on a weighted average. The weighted average is based on the effective sample sizes for each group.

Finally, the combined sample is weighted to represent the US population using data from the Current Population Survey (CPS) on age, gender, race, and region as noted above.