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The Household Mail Survey

Mail Use & Attitudes 2025

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HOUSEHOLD MAIL SURVEY (HMS) FY 2025

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Executive Summary

This report documents the findings of the United States Postal Service's Household Mail Survey (HMS) for Fiscal Year (FY) 2025. The main objectives of the survey are to:

- Measure the types and volumes of mail sent and received by U.S. households,
- Track trends in mail usage over time, and
- Compare mail usage across household demographic characteristics.

The report examines these trends in the context of changes and developments in the markets in which the U.S. Postal Service operates: correspondence, transactions, advertising, periodicals, and package deliveries.

Background

The Household Mail Survey, conducted each year since 1987, collects information about households' use of mail and how usage changes over time. The HMS consists of two surveys of households. The first survey is a preliminary *recruitment survey* which gathers information about household demographics as well as information about methods the household uses to pay and receive bills and statements, household attitudes toward mail advertising, and other information related to their use of the mail. The second survey is a *mail diary* in which households report the volumes and types of mail they received and sent during a given week.

The FY 2025 report covers Government Fiscal Year 2025, which ran from October 1, 2024, to September 30, 2025, with comparisons to 2015 and 2020, as appropriate.

Overview

As seen in Table E.1, in 2025, U.S. households received an average of 601 pieces of mail from non-households, primarily businesses and governments. Households sent an average of 20 pieces to non-households and there was an average of 17 pieces of mail sent from one household to another. Overall, total mail received or sent by households equaled 637 pieces per household in 2025.

The total volume of household mail can be estimated by multiplying the pieces per household by the 135 million U.S. households in 2025.[1] That calculation produces an estimate of total household mail in 2025 of 86 billion pieces, or about 80% of the 109 billion pieces of mail delivered by the USPS. The remaining 20% consists of mail from non-households to non-households.

[1] United States Census Bureau, "Historical Households Tables," last modified December 2, 2025, https://www.census.gov/data/tables/time-series/demo/families/households.html.

Table E.1: Mail Received and Sent by Households in FY2025

Mail Flows	Pieces per Household	Total Mail (Billions of Pieces)
Non-Household to Household	600.5	80.9
Household to Non-Household	19.5	2.6
Household to Household	17.3	2.3
Total Household Mail	637.3	85.9
Total USPS Mail	—	108.7
Household Mail Share		**79%**

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

Mail Markets

The Household Mail Survey examines mail by the markets the U.S. Postal Service serves. This categorization by market in some cases cuts across mail classes to provide a foundation for understanding mail flows and the marketplace changes that affect them. Table E.2 shows household mail volumes by market for 2025.

Of the 637 pieces of mail received and sent per household in 2025, 99 pieces were correspondence mail, and 94 pieces were transactions mail. Most household mail was advertising mail with 393 pieces received per household in 2025. In addition, households received an average of 22 periodicals in 2025 and received or sent 42 packages.

Table E.2: Household Mail Volume Sent and Received by Mail Market Served

(Pieces per Household per Year)

Market	2015	2020	2025	% change 2015-2025	% change 2020-2025
Correspondence	142.4	125.1	98.6	-31%	-21%
Transactions	189.5	141.2	93.7	-51%	-34%
Advertising	658.9	502.9	393.0	-40%	-22%
Periodicals	40.0	29.6	21.9	-45%	-26%
Packages	32.1	47.0	41.5	29%	-12%
Other	14.0	11.6	5.9	-58%	-49%
Total	1,040.6	837.0	637.3	-39%	-24%

Source: HMS Diary Sample. Notes: Correspondence and packages exclude double-counted pieces reported as both sent and received by households (see Appendix B). Advertising includes First-Class advertising-enclosed mail that is also included in another category but excluded from total to avoid double-counting. Other includes unclassified First-Class Mail. Values may not sum to totals due to rounding.

Total household mail has been in decline for nearly twenty years. As shown in Table E.2, mail per household fell 24% in the five years from 2020 to 2025, and 39% over the decade from 2015 to 2025. Most of this decline is due to the ongoing shift of mail to various electronic alternatives available online and through other technologies. In addition, the social and economic disruptions caused by the Covid-19 pandemic negatively impacted many mail categories, most substantially advertising mail.

Focusing on the past ten years, per-household volumes of correspondence mail declined 31%, transaction mail declined 51%, advertising mail declined 40%, and periodicals mail declined 45%. Note that because

the total number of U.S. households grew around 8% over the past decade, the declines in total mail volumes were less than the declines measured on a per household basis.

The exception to this decline in mail volume was seen with packages, which increased 29% from 2015 to 2025. Packages still declined from 2020 to 2025, albeit by the smallest percentage at 12%. The increase in package volumes over the past decade is a result of the growth in online shopping and e-commerce over the same time period, along with the surge in online shopping during the pandemic.

However, except for the benefit that growing use of online shopping has had on USPS package volumes, technological changes have mostly harmed mail volumes. A related development is the greater decline in mail volumes among younger households – households that are more likely to be comfortable with using technological alternatives to the mail. This effect is presented in Table E.3, which shows trends in correspondence mail received and sent by age of the householder.

Table E.3: Correspondence Mail Volumes by Age of Householder

(Pieces per Household per Year, FY2025)

Age of Householder	2015	2020	2025	% change 2015-2025	% change 2020-2025
Under 45	116.7	87.5	71.5	-39%	-18%
45-64	152.5	134.8	101.9	-33%	-24%
65 and Over	168.1	161.3	130.4	-22%	-19%
All households	**142.4**	**125.1**	**98.6**	**-31%**	**-21%**

Source: HMS Diary Sample, FY 2025. Note: Includes both received and sent mail, double count removed.

Households headed by someone under 45 years old received and sent an average of 72 pieces of correspondence mail in 2025, while households headed by someone aged 65 or older received and sent an average of 130 pieces, nearly twice as many. Moreover, younger households saw a greater decline in correspondence mail, with their volume falling 39% from 2015 to 2025 compared with a 22% decline for the households with a householder aged 65 or older.

More evidence of how technological developments are affecting the mail is found in Table E.4, which shows that household bill payments and household bills and statements received have shifted from the mail to electronic alternatives. For example, in 2015, households paid 31% of their bills by mail; by 2025 that share had dropped to 14%, with 77% of household bills paid electronically. Table E.4 also shows that the share of bills and statements received by mail fell from 77% in 2015 to 55% in 2025.

Table E.4: Shares of Household Bills Paid vs. Bills and Statements Received

Household Bills **Paid** by Method			
Shares	**2015**	**2020**	**2025**
Mail	31%	21%	14%
Electronic	62%	73%	77%
In-Person or Telephone	7%	6%	10%
Household Bills and Statements **Received** by Method			
Shares	**2015**	**2020**	**2025**
By Mail	77%	62%	55%
Electronically only	23%	38%	45%

Source: HMS Recruitment Sample. Notes: Values may not sum to totals due to rounding. Electronic includes online, automatic deduction from bank account, and automatic charge to debit or credit card.

Advertising mail accounted for 62% of all household mail in 2025. Although advertising mail has declined over the past decade, it continues to be an effective way of reaching both existing and prospective customers. Table E.5 shows that 64% of advertising mail sent to existing customers is read by the recipients, and for 25% of this mail, the recipient says they are very likely to respond to the mailing. Reading and response rates are lower for prospective customers – those that do not have a past relationship with the mailer – but they are still an indication that direct mail continues to be an effective way for businesses to expand their customer base. Likelihood of responding is measured on a ranking by the survey respondent of each piece of mail on a scale from 1 to 10, with 10 being most likely to respond. A rank of 8 or more is defined as "very likely."

Table E.5: Reading and Response Rates to Marketing Mail Advertising by Past Relationship
(Percentage of Pieces, FY2025)

Past Business Relationship with Recipient	Reading Rate	Very Likely to Respond
Existing Customers	64%	25%
Prospects	36%	3%
All Recipients	**50%**	**13%**

Source: HMS Diary Sample, FY 2025Q2-Q4. Note: Mail pieces for which reading or response treatment were not provided are excluded.

Periodical mail volumes recorded in this report include only periodicals delivered by the USPS. Table E.6 shows that in 2025, households received an average of 22 periodicals, of which 13 were magazines, with newspapers being the second largest periodical category at about 6 pieces per household per year. Table E.6 also shows that magazines received have fallen 58% over the past ten years while newspapers received have increased by 1%. Most of the decline in newspaper circulation occurred in the years before 2015.

Table E.6: Postal Service Periodical Type by Year

(Pieces per Household per Year)

Periodical Type	2015	2020	2025	% change 2015–2025	% change 2020–2025
Magazines	31.0	21.0	13.1	–58%	–38%
Newspapers	5.7	6.1	5.7	1%	–7%
Other	3.3	2.4	3.0	–8%	25%
Total Periodicals	**40.0**	**29.6**	**21.9**	**–45%**	**–26%**

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

As discussed above, packages are the only major postal market that has grown over the past decade. Table E.7 shows that most of this growth has occurred in less urbanized areas. Households living in large Metropolitan Statistical Areas (MSAs) received 2% fewer packages in 2025 than in 2015, staying relatively flat, while households living in other MSAs received 68% more packages. These percentage changes pale in comparison to the 154% increase in the per-household packages received by households living outside of MSAs. These data demonstrate that while the Postal Service has benefited from the general growth in the package market over the past decade, it is particularly well-positioned in less urbanized areas, which are often underserved by USPS competitors.

Table E.7: Packages Received by MSA Classification

(Pieces per Household per Year)

Metro Area Classification	2015	2020	2025	% change 2015–2025	% change 2020–2025
Large MSA	33.4	41.3	32.8	–2%	–21%
Other MSA	27.4	46.9	46.0	68%	–2%
Non-MSA	19.7	43.4	50.0	154%	15%

Source: HMS Diary Sample.

Chapter 1: Introduction – Household Mail Volumes & Trends

The United States Postal Service Household Mail Survey (HMS) Report documents the findings of the Fiscal Year (FY) 2025 study. The HMS measures the mail sent and received by U.S. households, tracks volume trends over time, and compares mail usage across households' demographic characteristics.

The Survey

The Household Mail Survey (previously known as the Household Diary Study or HDS) has been conducted each year since 1987 and collects information about U.S. household use of the mail and how usage changes over time. In addition to information about the volume of different types of mail received and sent by households, the HMS also collects household demographic information allowing for analysis of differences in mail use across different types of households. Information is also collected about household use of the mail and digital alternatives for the receipt of bills and statements and the payment of bills.

The Survey Consists of Two Parts:

1) An **entry, or recruitment interview**, conducted by phone or Web, collects demographic and attitudinal information from about **12,000** households.
2) Some of these recruitment households then go on to complete a **mail diary**, in which they report information on the mail the household sends and receives in a specific one-week period. Approximately 100 households complete the diary each week yielding an annual survey from about **5,000** households.

The data generated by the recruitment survey and mail diary are the basis of the analysis in this report. The 2025 HMS report covers the 2025 government fiscal year which ran from October 1, 2024, through September 30, 2025. Data for 2015 and 2020 are also reported on a fiscal year basis. Note that the 2015 and 2020 data were collected as part of the then-named Household Diary Study but will be referred to as the 2015 HMS and 2020 HMS in this report.

Findings are used to assist in market research, forecasting, and strategic planning within the Postal Service and can be viewed by the public on the Postal Regulatory Commission website.

Mail Flows: Sender and Recipient

Mail volume can be broken into four basic flows, based on the sender and the recipient. These flows are:

1) Household to household,
2) Household to non-household,
3) Non-household to household, and
4) Non-household to non-household, which is not measured by the Household Mail Survey. These volumes are estimated from comparisons of total USPS mail volumes and total household mail volumes estimated from HMS data. Non-households are primarily businesses and governments.

According to the 2025 HMS, households received an average of 601 pieces of mail from non-households. Households sent about 20 pieces to non-households during the year. Around 17 pieces were household-to-household mail. In total, households sent or received an average of 637 pieces of mail in 2025.

Table 1.1 converts the per household mail volumes into total mail volumes by multiplying by the population of 135 million U.S. households in 2025.[2] This calculation estimates that in 2025, there were 80.9 billion pieces of non-household to household mail, 2.6 billion pieces of household-to-non-household mail, and 2.3 billion pieces of household-to-household mail. Combining these three mail flows yields an estimate of total household mail of 85.9 billion pieces.

Table 1.1: Mail Received and Sent by Households in FY2025

Mail Flows	Pieces per Household	Total Mail (Billions of Pieces)
Non-Household to Household	600.5	80.9
Household to Non-Household	19.5	2.6
Household to Household	17.3	2.3
Total Household Mail	637.3	85.9
Total USPS Mail	—	108.7
Household Mail Share		**79%**

Source: HMS Diary Sample, FY 2025, USPS FY 2025 RPW reports. Note: Values may not sum to totals due to rounding.

According to the Postal Service's FY2025 RPW (Revenue, Piece, and Weight) reports the USPS delivered a total of 108.7 billion pieces of mail in 2025, with that total including volumes mail sent from non-households (primarily businesses and governments) to other non-households. Therefore, it is estimated that household mail represented 79% (85.9 billion of 108.7 billion) of all mail delivered by the Postal Service in 2025, with the remainder being mail sent between non-households.

Table 1.2 presents volumes by type of mail flow as a percentage of the total. Most of the mail delivered by USPS is sent by non-households to households (74%), with 21% of the mail sent between non-households. Only small fractions of mail volume are sent from one household to another household (2%) or from a household to a non-household (2%). Put another way, only about 4% of total USPS mail is sent by households.

Table 1.2: Total Mail Flows

(Percent of Total Mail Delivered by USPS, FY2025)

Sent By:	Received By:	
	Household	Non-Household
Household	2%	2%
Non-Household	74%	21%

Source: HMS Diary Sample, RPW Reports, FY 2025.

Table 1.3 below shows mail received and sent by households in 2015, 2020, and 2025 in terms of pieces per household per year.

[2] United States Census Bureau, "Historical Households Tables," last modified December 2, 2025, https://www.census.gov/data/tables/time-series/demo/families/households.html.

Table 1.3: Total Mail Received and Sent by Households

(Pieces per Household per Year)

Mail Flows	2015	2020	2025	% Change 2015-2025	% Change 2020-2025
Non-Household to Household	958.2	780.1	600.5	-37%	-23%
Household to Non-Household	53.3	36.1	19.5	-64%	-46%
Household to Household	29.1	22.8	17.3	-41%	-24%
Total Household Mail	1,040.6	839.0	637.3	-39%	-24%
Total US Households (millions)	124.6	128.5	134.8	8%	5%

Source: HMS Diary Sample, U.S. Census Bureau. Note: Values may not sum to totals due to rounding.

Non-household-to-household mail declined 23% in the five years from 2020 to 2025, and 37% over the decade from 2015 to 2025. The most dramatic decrease in mail flow was observed in household-to-non-household mail, which declined by 64% from 2015 to 2025. A likely reason that this category fell more than others was the increased use of the internet and other technologies for paying bills and corresponding with businesses and governments. Household-to-household mail experienced a sizeable decrease with a 41% decline in the last decade. A major cause for this decline was the migration to online and electronic alternatives to correspondence by mail between households.

Overall, total household mail fell from 1,041 pieces per household in 2015 to 839 pieces per household in 2020 and to 637 pieces per household in 2025, a total decline of 39% over the past decade. Note that because the total number of U.S. households increased over the past ten years, the percentage decline in total household mail has been somewhat less than the percentage decline in pieces per household.

Mail Markets vs. Mail Classes

While the USPS RPW report organizes mail by class, the HMS annual report organizes mail by the markets in which the Postal Service operates. In many cases, the mail markets and mail classes are identical. In some cases, the mail markets and classes differ. The markets analyzed in this report include the following:

Correspondence Mail consists of First-Class Mail that is used solely or primarily to deliver (non-sales-related) communications, such as letters, greeting cards, and communications between households and businesses.

Transactions Mail consists of First-Class bills and financial statements, mail payments by households, and other transactions mail.

Advertising Mail includes Marketing Mail as well as First-Class Mail that includes advertising, and other small categories of advertising mail.

Periodicals consist of magazines, newspapers, and other publications delivered in the mail.

Packages consist of packages delivered by the Postal Service, including those sent by and received by households and those originated with another shipper, but ultimately delivered by the Postal Service.

Table 1.4 presents mail sent and received by households in 2025, organized by the above markets, in terms of average number of pieces per household.

Correspondence and transaction mail each represented about 15% of total household mail.

The advertising market was by far the largest in 2025, accounting for 62% of total household mail. This may come as no surprise considering mail advertisements' ability to connect local businesses with local customers.

Periodicals account for a very small portion of total household mail, about 3%, with many magazines and newspapers transitioning to online formats. Packages accounted for 7% of pieces sent or received by households in 2025.

Table 1.4: Pieces Received and Sent per Household – Markets, FY2025

Mail Market	Pieces per Household per Year	Share of Total Household Mail
Correspondence	98.6	15%
Transactions	93.7	15%
Advertising	393.0	62%
Periodicals	21.9	3%
Packages	41.5	7%
Other	5.9	1%
Total Household Mail	**637.3**	

Source: HMS Diary Sample. Notes: Correspondence, transactions and packages exclude double-counted pieces reported as both sent and received by households (see Appendix B). Advertising includes 17.2 pieces per year of First-Class advertising-enclosed mail that is also included in another category but excluded from total to avoid double-counting. Other includes First Class Mail that could not be classified. Values may not sum to totals due to rounding.

Report Organization

The remainder of this report is organized as follows:

Chapter 2: Demographics and Mail Usage

Chapter 3: Correspondence Mail

Chapter 4: Transactions Mail

Chapter 5: Advertising Mail

Chapter 6: Periodicals

Chapter 7: Packages

In addition, there are two appendices to the report:

Appendix A: Supplementary Data Tables contains a set of tables for major classes and types of mail.

Appendix B: Methodology documents the study methodology and discusses how the data were collected, processed and weighted, and how the data are presented in the report.

A copy of the instruments used to administer the survey is available upon request.

Chapter 2: Demographics and Mail Usage

Introduction

This chapter provides an overview of demographic trends and other factors affecting mail flows and usage. The breakouts introduced provide the framework for much of the analyses in later chapters.

Mail Volume and Demographics

Table 2.1 illustrates changes in mail volumes and changes in various measures of the size of the U.S. Postal Market. The mail volumes presented here include both household and non-household mail. Subsequent sections will look at household demographics and household mail.

Table 2.1: Mail Volume and Measures of the Size of the Mail Market

	2015	2020	2025	% Change 2015–2025	% Change 2020–2025
Total Mail Volume (billions)	154.3	129.2	108.7	-30%	-16%
Delivery Points (millions)	155.0	161.4	170.4	10%	6%
Households (millions)	124.6	128.5	134.8	8%	5%

Source: U.S. Postal Service – Total Mail Volume and Delivery Points, U.S. Census Bureau – Households.

From 2015 to 2025, total mail volume fell 30%, from 154 billion pieces to 109 billion. During this same period, the number of Postal Service delivery points grew 10%, or about 1% per year. The total number of U.S. households grew at a somewhat slower pace, 8% over the past 10 years and 5% over the past 5 years. Regardless of the measure, the volume of mail has declined while the number of mail users has grown.

The last decade saw significant declines in mail volumes even as household formation and delivery points continued to rise.

Tables 2.2 through 2.6 illustrate how certain households' demographic characteristics can affect mail usage more significantly than others. Note that several of the demographic variables presented in this section are aligned with Census data through a weighting process described in Appendix B. This weighting is done so that key demographics of the HMS sample align with the entire U.S. population.

Household Demographics play an important role in the volume of household mail. Mail volumes are strongly correlated with the age of the householder and are also affected by household education, income, and homeownership.

Households in the HMS are classified by age according to the age of the householder, where the householder is someone identified by the respondent as paying the rent or owning the home. This is similar to the approach used in major surveys carried out by the U.S. Census Bureau such as the Current Population Survey. All references to age groups of households in this report reflect the age of the householder.

Table 2.2 shows that mail volume is strongly correlated with the age of the householder. Households headed by someone age 65 or older received or sent 40% of all household mail in 2025, far above their 30% share of the U.S. population. Conversely, householders under 35 made up 20% of households but only accounted for 11% of the total household mail. The shares of mail received or sent by householders age 35 to 64 are close to their shares of total households, though even within these age groups older households' mail share was somewhat greater than their population share.

Table 2.2: Age of Householder and Mail Volume

(Pieces per Household per Year, FY2025)

Age of Householder	Received	Sent	Share of total mail	Share of households
Under 35	346.9	18.8	11%	20%
35 to 44	464.7	33.5	13%	17%
45 to 54	628.6	33.1	17%	16%
55 to 64	684.0	43.4	19%	17%
65 to 74	824.1	57.0	22%	17%
75 and Over	874.4	53.9	18%	13%

Source: HMS Diary Sample.

Table 2.3 shows that the volume of household mail received and sent is strongly affected by household income. Combining received and sent mail, we see that higher income households' ($100,000 and above) share of the mail is greater than their share of all households, households earning between $50,000 to $100,000 have an equal share of mail to their share of all households, and households with incomes below $50,000 have a lower share of mail than their share of all households.

Table 2.3: Household Income and Mail Volume

(Pieces per Household per Year, FY2025)

Household Income	Received	Sent	Share of total mail	Share of households
Under $50K	491.2	32.3	30%	37%
$50K to $100K	599.7	39.6	32%	32%
$100K to $150K	697.6	40.1	18%	16%
$150K and Over	818.7	50.2	20%	15%

Source: HMS Diary Sample.

Similar to age, households in the HMS are classified by education according to the highest level of education attained by the householder. This is again similar to the approach used by the Census Bureau.

As Table 2.4 highlights, education is another demographic factor that impacts the volume of household mail received, with pieces per household increasing as educational attainment increases. The relationship between education and mail sent is less clear. Households headed by someone without a high school diploma sent less mail than households headed by a high school graduate, but beyond high school, higher levels of householder education did not have much impact on mail sent. For each education level, the share of mail is not much different from the share of all households, though households headed by a college graduate did account for a larger share of mail than their share of households.

Table 2.4: Education of Householder and Mail Volume

(Pieces per Household per Year, FY2025)

Educational Attainment of Householder	Received	Sent	Share of total mail	Share of households
Up to 12th Grade (No Diploma)	490.9	25.9	5%	6%
High School Graduate	573.7	38.5	24%	25%
Some College or Technical School Graduate	607.5	40.9	25%	26%
College Graduate	673.1	39.3	47%	43%

Source: HMS Diary Sample.

Table 2.5 shows that homeowners received and sent about twice as much mail as renters. Overall, homeowners accounted for 79% of all household mail, well above their 66% share of all households. However, it should be noted that homeownership is correlated with age and income, two other factors which also affect mail volume.

Table 2.5: Homeownership and Mail Volume

(Pieces per Household per Year, FY2025)

Homeownership Status	Received	Sent	Share of total mail	Share of households
Homeowner	743.7	43.7	79%	66%
Renter	377.1	29.0	21%	34%

Source: HMS Diary Sample.

Table 2.6 presents mail volumes depending on whether the household lives in a large MSA (Metropolitan Statistical Area) in the U.S., another MSA, or outside of an MSA. Note that the definition of large MSA used here changed between 2020 and 2025 (see Appendix B – Methodology).

Total mail volumes sent and received are not very different across large and other MSA. However, Non-MSA households sent about 10 more pieces per year and received about 30 fewer pieces compared to large and other MSAs. Later chapters will also show there are some types of mail where differences between more urbanized and more rural households are especially important.

Table 2.6: MSA Classification and Mail Volume

(Pieces per Household per Year, FY2025)

MSA Classification	Received	Sent	Share of total mail	Share of households
Large MSA	623.8	36.6	53%	53%
Other MSA	621.3	38.8	32%	31%
Non-MSA	589.1	46.3	15%	16%

Source: HMS Diary Sample.

Table 2.7 shows changes over time in the different age groups' share of total mail and share of total households. This table illustrates a recurring theme regarding household mail – that it is increasingly skewed toward older households. For example, in 2015, households headed by someone age 65 or over accounted for 31% of all household mail and 24% of all households. By 2025, the 65 or over age group accounted for 40% of all mail and 30% of all households.

In contrast, younger households – those headed by someone aged under 35 – saw their share of total mail fall from 14% in 2015 to 11% in 2025, far below their 20% share of total households in that year.

Table 2.7: Age of Householder and Mail Volume Shares

(Pieces per Household per Year)

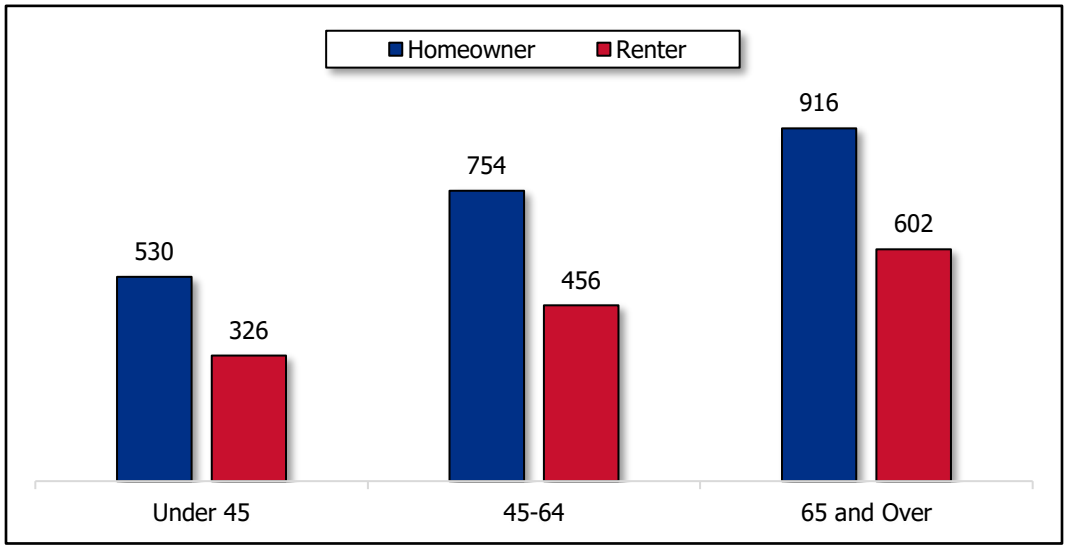
Age of Householder	2015		2020		2025	
	Share of total mail	Share of households	Share of total mail	Share of households	Share of total mail	Share of households
Under 35	14%	22%	11%	20%	11%	20%
35-44	16%	17%	13%	16%	13%	17%
45-54	19%	19%	17%	17%	17%	16%
55-64	21%	18%	21%	19%	19%	17%
65-74	17%	13%	22%	16%	22%	17%
75 and Over	14%	11%	16%	12%	18%	13%

Source: HMS Diary Sample. Note: Values may not sum to 100% due to rounding.

Figure 2.1 illustrates the differences in mail volume between homeowners and renters across age groups. Given that homeownership is strongly correlated with the age of householders, this figure helps isolate the effect of homeownership by comparing renters and homeowners within the same age categories. Roughly speaking, homeowners receive 50% more mail pieces than renters within each age group, as illustrated below.

Figure 2.1: Mail Pieces by Age and Homeownership

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample.

Chapter 3: Correspondence Mail

Introduction

This chapter examines the flow of correspondence mail from household to household and between households and businesses, including letters, greeting cards, invitations, and announcements. More detail on what types of mail are included in the correspondence category is presented in Tables 3.4 and 3.5. In 2025, correspondence mail represented 15% of all household mail.

Correspondence Mail Volume

Correspondence mail has declined steadily since the early 2000s, when both personal and business communications began migrating to the internet. As shown in Table 3.1, correspondence mail received by households fell 28% from 2015 to 2025. Over the same period, correspondence mail sent by households fell 45%, indicating that households are comfortable using alternatives to the mail for sending correspondence. In 2025, households received an average of 93 pieces of correspondence mail and sent an average of about 22 pieces. Total correspondence mail received or sent by households was approximately 99 pieces per year. The total is less than the sum of the individual received and sent volumes because household-to-household correspondence mail is included in both the received and sent categories, but this double-count is removed from the total (see Appendix B).

Table 3.1: Total Household Correspondence Volumes

(Pieces per Household per Year)

	2015	2020	2025	% change 2015–2025	% change 2020–2025
Received	128.6	116.1	92.7	–28%	–20%
Sent	39.7	28.5	21.8	–45%	–24%
Total	**142.4**	**125.1**	**98.6**	**–31%**	**–21%**

Source: HMS Diary Sample. Note: Total is adjusted for double count of pieces sent and received between households.

Table 3.2 shows changes in the flows of mail from households and non-households. From 2020 to 2025, correspondence mail sent from households to other households and from households to non-households fell 36% and 35%, respectively. Correspondence mail from non-households to households fell just 16%.

Table 3.2: Household Correspondence by Mail Flow

(Pieces per Household per Year)

Mail Flow	2015	2020	2025	% change 2015–2025	% change 2020–2025
Household to household	25.1	21.9	14.0	–44%	–36%
Non-household to household	103.5	94.2	78.7	–24%	–16%
Household to non-household	13.8	9.1	5.9	–57%	–35%
Total	**142.4**	**125.1**	**98.6**	**–31%**	**–21%**

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

Correspondence mail received by households has been somewhat varied as seen in Table 3.3. The largest component was notices/announcements/invitations, at around 30 pieces per household in 2025. This category's volume declined by approximately 8 pieces per household between 2015 and 2020 and another 10 between 2020 and 2025, resulting in a total percentage decline of 39% over the past ten years. Other types of correspondence mail received include personal letters or cards, and correspondence related to insurance and taxes. Interestingly, insurance-related correspondence mail volume has increased over the past decade, reaching almost 20 pieces per household per year in 2025. Even with that increase, total correspondence mail received fell from 129 pieces per household in 2015 to 93 per household in 2025, a decline of 28%.

Table 3.3: Household Correspondence Mail Received by Contents
(Pieces per Household per Year)

Contents	2015	2020	2025	% change 2015-2025	% change 2020-2025
Notice/announcement/invitation	48.1	39.9	29.6	-39%	-26%
Personal letter or card	24.9	22.5	19.5	-22%	-13%
Insurance Related (EOBs, etc.)	18.5	17.6	19.6	6%	11%
Tax-related correspondence	9.0	9.8	6.4	-29%	-35%
Other Correspondence	28.1	26.2	17.6	-37%	-33%
Total Correspondence Mail Received	**128.6**	**116.1**	**92.7**	**-28%**	**-20%**

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

Table 3.4 shows that most correspondence mail sent consists of greeting cards, holiday cards, or birthday cards, which totaled 11 pieces per household in 2025, or just about half of the 22 total pieces sent per household in 2025. Households sent an average of 4 personal letters or postcards in 2025, about half as many as they sent in 2015. Other correspondence mail sent – including invitations, announcements, tax-related materials and various other categories – has also halved over the past ten years. Total correspondence mail sent fell 24% in the five years from 2020 to 2025, and 45% over the decade from 2015 to 2025.

Table 3.4: Household Correspondence Mail Sent by Contents
(Pieces per Household per Year)

Contents	2015	2020	2025	% change 2015-2025	% change 2020-2025
Greeting/holiday/birthday card	17.8	14.2	11.0	-38%	-22%
Personal letter or postcard	7.1	5.3	3.7	-48%	-29%
Other Correspondence	14.8	9.0	7.0	-53%	-22%
Total Correspondence Mail Sent	**39.7**	**28.5**	**21.8**	**-45%**	**-24%**

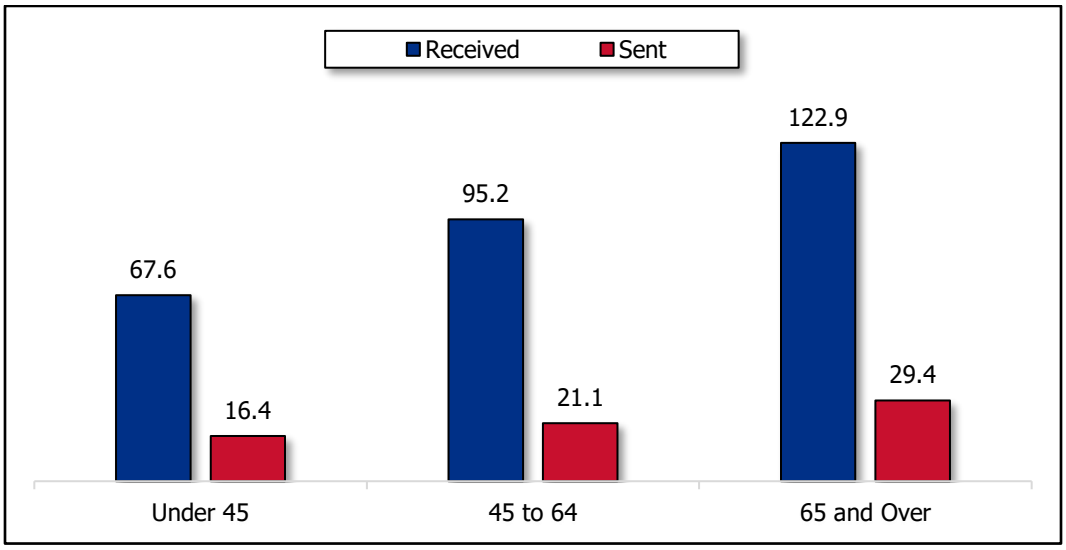
Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

Correspondence Mail and Household Characteristics

The following figures and tables categorize correspondence mail sent and received by households according to the demographic characteristics presented in Chapter 2. Figure 3.1 shows that household age is a key determinant of household correspondence mail volume. Households headed by someone 65 or older sent and received almost twice as many pieces as households headed by someone aged under 45.

Figure 3.1: Correspondence Mail Volumes by Age of Householder

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

Table 3.5 shows trends in correspondence mail (received and sent) by age of householder. From 2015 to 2025, households headed by someone under age 45 experienced a 39% decline in their total correspondence mail compared to a 22% decline for households headed by someone age 65 and over. Note, however, that over the past five years, the volume declines for these two age groups were about the same. This might indicate that the age impact on electronic diversion is waning as more and more older people have become familiar with the use of digital alternatives to correspondence mail. Nevertheless, the 21% decline from 2020 to 2025 in average volume across all households shows that diversion continues to negatively impact correspondence mail.

Table 3.5: Correspondence Mail Volumes by Age of Householder

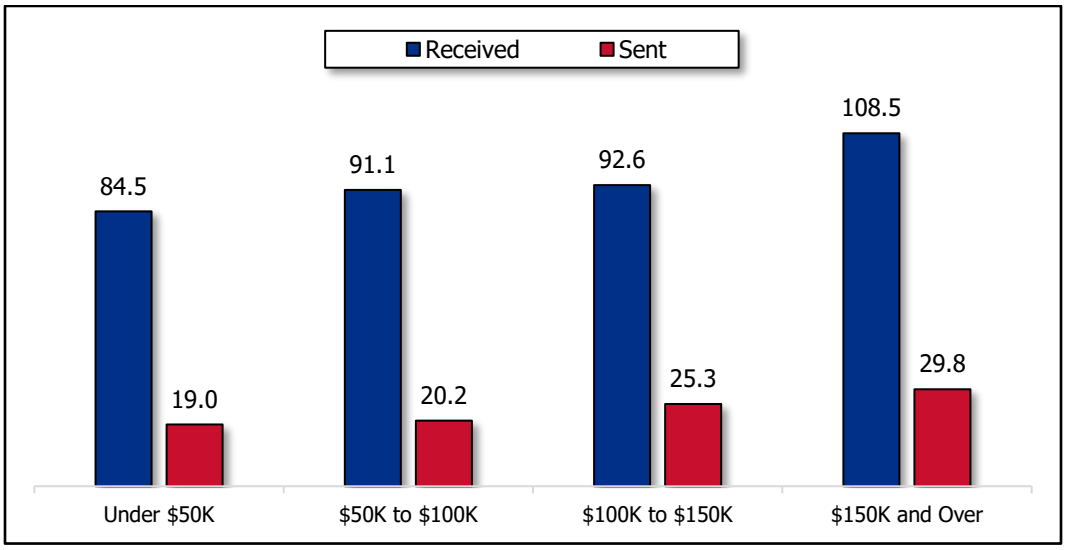
(Pieces per Household per Year)

Age of Householder	2015	2020	2025	% change 2015–2025	% change 2020–2025
Under 45	116.7	87.5	71.5	-39%	-18%
45–64	152.5	134.8	101.9	-33%	-24%
65 and Over	168.1	161.3	130.4	-22%	-19%
All households	**142.4**	**125.1**	**98.6**	**-31%**	**-21%**

Source: HMS Diary Sample, FY 2025. Note: Includes both received and sent mail, double count removed.

Figure 3.2 shows that household income also affects the volume of correspondence mail received. Households with an annual income of $150,000 and over received about 30% more correspondence mail than households earning less than $50,000, and roughly 20% more than households earning between $50,000 and $150,000. Similarly, households with an annual income of $150,000 and over sent 57% more correspondence mail than households earning less than $50,000, about 48% more than households earning between $50,000 to $100,000, and around 18% more than households earning between $100,000 and $150,000.

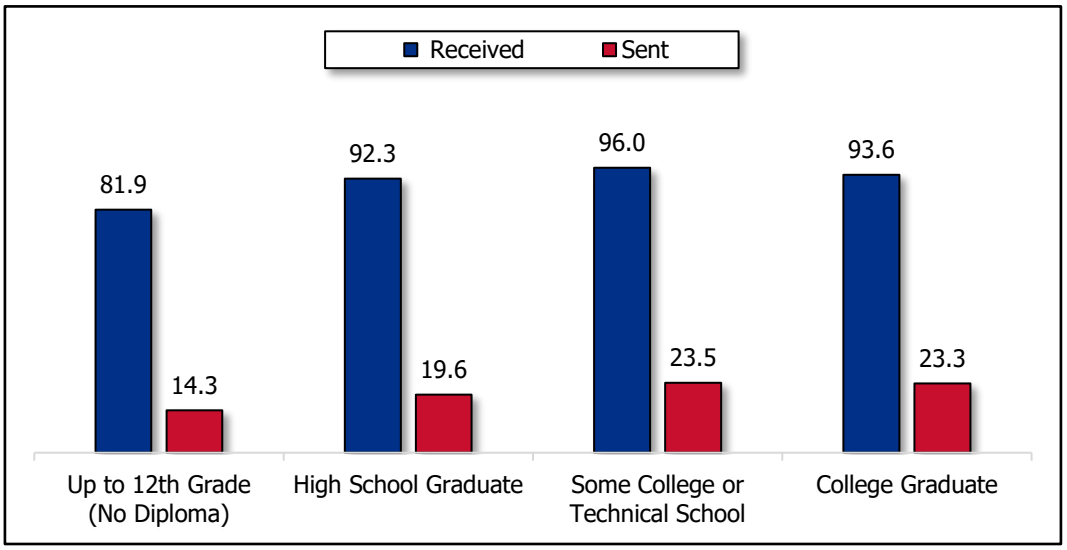
Figure 3.2: Correspondence Mail Volumes by Household Income
(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

An interesting result is found in Figure 3.3, which looks at correspondence mail by educational attainment of the householder. Except for the lowest education households, correspondence mail received is about the same across all the other education levels, ranging between 92 and 96 pieces per year. Education has somewhat more of a noticeable impact on correspondence mail sent, with households headed by someone without a high school diploma sending an average of just 14 pieces per year. Households headed by a high school graduate sent about 20 pieces, and households headed by someone with some college or a college degree sent an average of about 23 pieces.

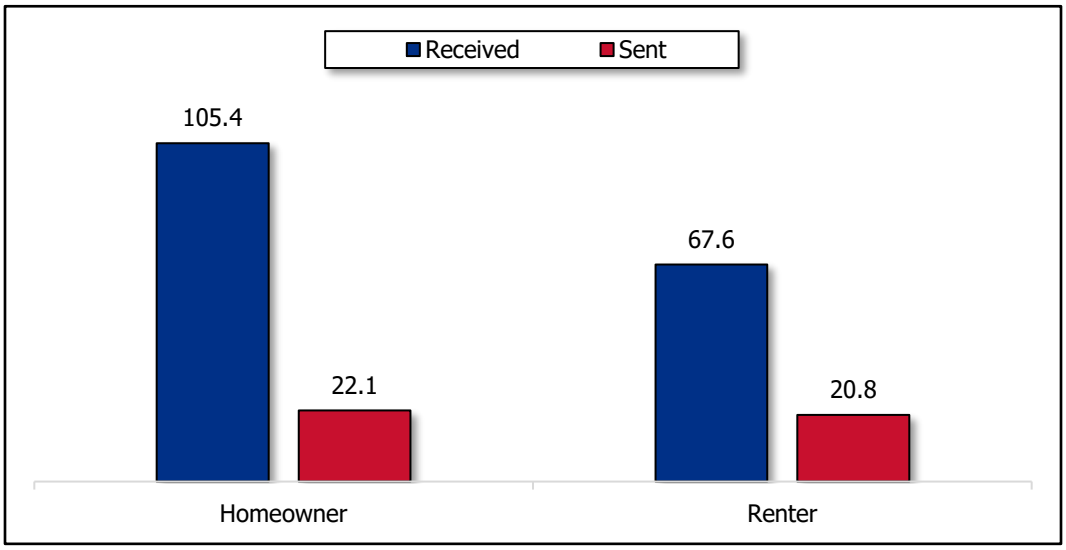
Figure 3.3: Correspondence Mail Volumes by Educational Attainment of Householder
(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

Homeowners received an average of 105 pieces of correspondence mail in 2025 compared with 68 pieces received on average by renters. There is not much difference between homeowners and renters for correspondence mail sent, with both groups sending an average of just over 20 pieces in 2025.

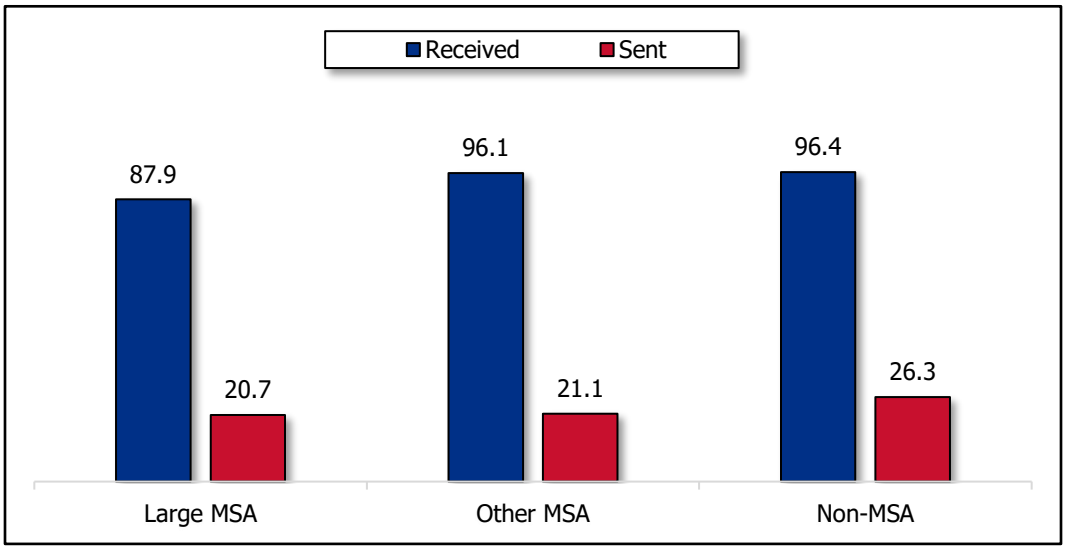
Figure 3.4: Correspondence Mail Volumes by Homeownership
(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

Figure 3.5 shows correspondence mail volumes for households living in different metro classifications. Households outside of an MSA sent more correspondence mail than households living within an MSA. Households living in a large MSA received fewer pieces on average than other households.

Figure 3.5: Correspondence Mail Volumes by MSA Classification
(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

Chapter 4: Transaction Mail

Introduction

This chapter examines transaction mail sent and received by households. Transaction categories include bills, financial statements, payments, and donations. In 2025, transaction mail accounted for 15% of total household mail.

Transaction Mail Volume

Starting in the early 2000s, household bill payments began shifting from the mail to electronic payment methods such as online payments or automatic deductions. Bills and statements received by households also started arriving online instead of by mail, but that shift started later and occurred more slowly than the shift in payments. This difference is reflected in the smaller decline in transaction mail received compared to transaction mail sent. Electronic diversion has continued to be the key driver of the decline in transaction mail over the past ten years.

As shown in Table 4.1, total household transaction mail fell from 190 pieces per household in 2015 to 141 in 2020 to 94 in 2025, a decline of 51% over the past ten years. Transaction mail received has been dominated by bills and statements, which together represented about 78 of the 82 pieces received per household in 2025. Both have declined over the past ten years, with the volume of bills falling 49% and statements 36%.

Transaction mail sent by households consists mostly of payments, which averaged just over 10 pieces per household in 2025. Payment volumes have fallen 70% over the past decade and 47% over just the past five years.

Table 4.1: Transaction Mail Received and Sent

(Pieces per Household per Year)

Transaction Type	2015	2020	2025	% Change 2015-2025	% Change 2020-2025
Received					
Bills	111.5	82.4	57.1	-49%	-31%
Statements	32.7	30.1	20.9	-36%	-31%
Payments	9.5	7.3	4.3	-55%	-42%
Total Received	**153.7**	**119.8**	**82.3**	**-46%**	**-31%**
Sent					
Payments	34.3	19.3	10.2	-70%	-47%
Donations	2.1	2.4	1.4	-32%	-41%
Total Sent	**36.4**	**21.6**	**11.6**	**-68%**	**-46%**
Total Transactions	**189.5**	**141.2**	**93.7**	**-51%**	**-34%**

Source: HMS Diary Sample. Note: Total is adjusted for double count of pieces sent and received between households.

Transaction Mail and Household Characteristics

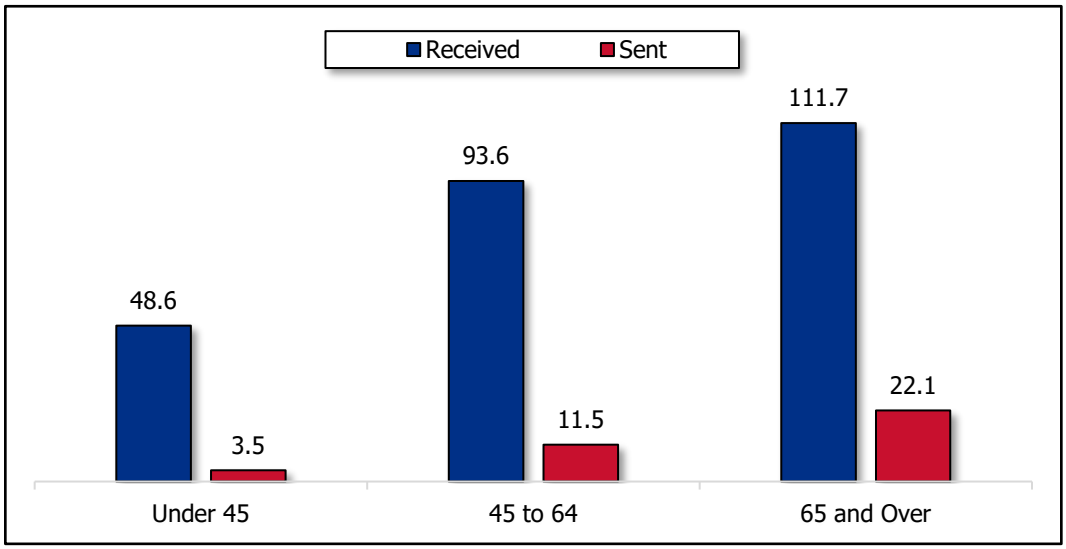
The following sections examine transaction mail sent and received by households based on the demographic characteristics outlined in Chapter 2.

As shown in Figure 4.1, transaction mail volume varies dramatically with age. Households headed by someone under 45 received and sent the lowest number of transaction mail pieces, averaging around 49 and 3.5 pieces per year, respectively. No doubt this is tied to younger households' greater familiarity with and use of technological alternatives to the mail as most people under the age of 45 have had internet access for their entire adult life.

In contrast, the oldest cohort (65 or older) received the most transaction mail pieces, averaging 112 pieces per household per year, more than twice the average received by the youngest cohort. For mail sent, the difference is far greater, with the oldest households sending more than 22 pieces of transaction mail, more than six times as many as the youngest age group and almost twice as many as sent by households headed by a 45 to 64 year old.

Figure 4.1: Transaction Mail Volumes by Age of Householder

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

Householders 65 and older received over twice as much transaction mail than those under 45.

Table 4.2 shows that not only do younger households receive and send fewer pieces of transactions mail than older households, but the decline in their transactions mail volume has also been greater than the decline for older households. In 2015, households in the under 45 age group received an average of about 117 pieces of transactions mail and sent about 22. By 2025, these volumes have fallen to 49 pieces (down 58%) and just 3.5 pieces (down 84%). The 65 and over age group saw declines during this period of 35% for transactions received and 61% for transactions sent.

Table 4.2: Transaction Mail Received and Sent by Age of Householder

(Pieces per Household per Year)

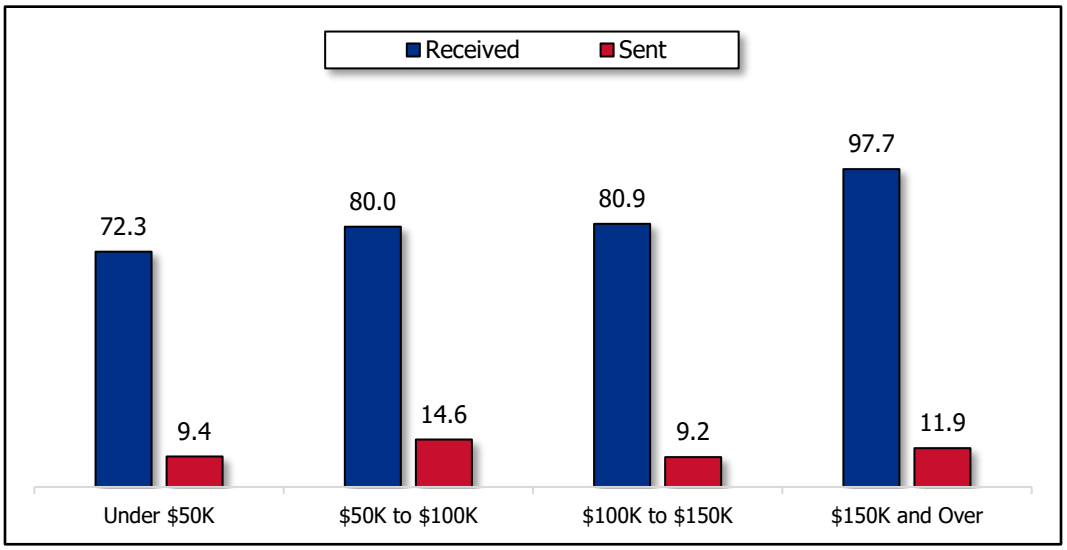
Age of Householder	Under 45			45 to 64			65 and Over		
	2015	2020	2025	2015	2020	2025	2015	2020	2025
Received	116.8	74.7	48.6	179.9	143.3	93.6	170.8	147.8	111.7
Sent	21.6	5.1	3.5	38.2	20.7	11.5	57.3	44.1	22.1

Source: HMS Diary Sample.

Figure 4.2 shows the relationship between household income and transaction mail received and sent. As household income increases, so does the amount of transaction mail received by a household. This largely reflects the fact that higher income households are likely to have more financial accounts. The amount of mail sent was mixed, with the $100,000 to $150,000 income group sending the fewest pieces at 9, but the next income group down, $50,000 to $100,000, sending the most at around 15 pieces.

Figure 4.2: Transaction Mail Volumes by Household Income

(Pieces per Household per Year, FY2025)

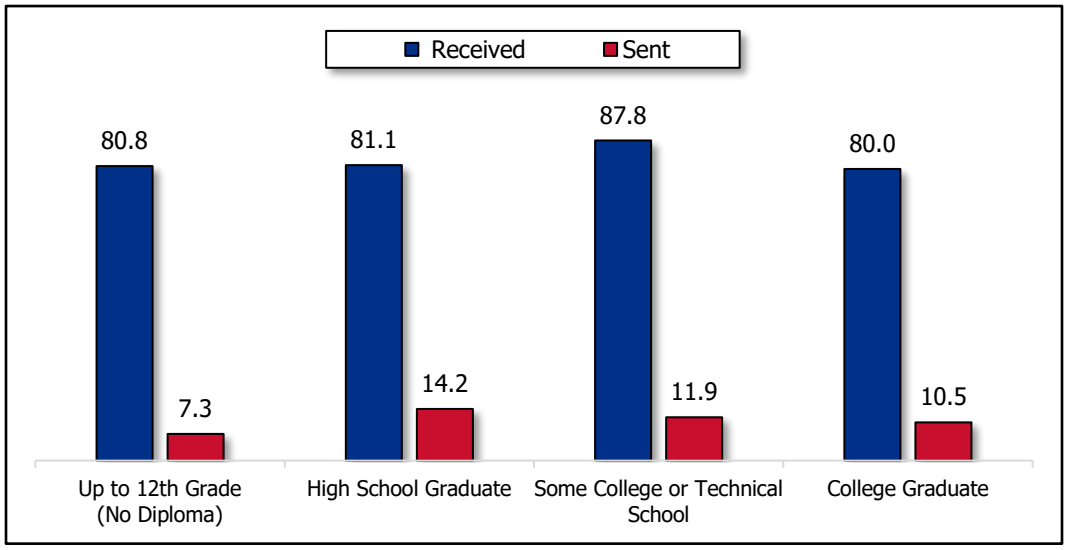


Source: HMS Diary Sample, FY 2025.

Figure 4.3 shows that there is no clear relationship between a householder's education and how much transaction mail that household receives or sends. This probably reflects the offsetting impact of two factors: 1) the higher income and greater number of financial accounts held by households with at least a high school diploma, and 2) the possibly greater level of experience and familiarity with digital transactions for householders with at least a high school diploma.

Figure 4.3: Transaction Mail Volumes by Educational Attainment of Householder

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

Bills and Statements Received by Households

Bills and statements comprise most of household transaction mail. Table 4.3 shows a breakdown of household bills and statements received by industry of sender in 2015, 2020, and 2025.

Table 4.3: Bills and Statements Received by Households by Industry

(Pieces per Household per Year)

Industry	2015	2020	2025	% Change 2015-2025	% Change 2020-2025
Financial	**82.5**	**67.8**	**44.8**	**-46%**	**-34%**
Credit card	29.2	24.1	17.1	-41%	-29%
Insurance Company	13.7	11.2	6.9	-50%	-38%
Other Financial	39.5	32.5	20.8	-47%	-36%
Merchants	**4.0**	**1.6**	**1.2**	**-71%**	**-29%**
Service	**51.8**	**39.2**	**27.2**	**-47%**	**-30%**
Utility/Phone/Internet Provider	34.3	26.0	17.3	-49%	-33%
Medical	13.8	9.5	8.1	-41%	-14%
Other Services	3.7	3.7	1.8	-52%	-52%
Government/Social/Nonprofit	**5.1**	**3.5**	**3.2**	**-37%**	**-7%**
Total - All Industries	**144.2**	**112.5**	**78.0**	**-46%**	**-31%**

Source: HMS Diary Sample. Note: Total includes some mail not classified into one of the above categories. Values may not sum to totals due to rounding.

The financial sector was the largest sender of bills and statements to households, accounting for 57% of the 78 pieces received per household in 2025 (note that store/retailer credit cards are included in the financial category). Bills and statements from services such as utilities or medical providers accounted for 35% of bills and statement mail received by households in 2025.

The major industries sending bills and statements to households have had similar declines in volume over the past ten and five years. For example, financial sector mailings fell 34% in the five years from 2020 to 2025, and 46% over the decade from 2015 to 2025, while service sector mailings fell 30% and 47% respectively, over those periods. The general decline in mailed bills and statements reflects their ongoing shift online.

Mailed vs. Online Bills and Statements

The general decline in mailed bills and statements shown in Table 4.3 reflects the ongoing shift to receiving bills and statements online. Table 4.4 shows the annual share of bills and statements received by mail vs. online, separately in the first two rows, and then together in the third. The share of bills received by mail has declined from 78% of the total in 2015 to 56% in 2025. The share of statements received experienced a similar decline during this period as more and more households have opted to receive bills and statements online.

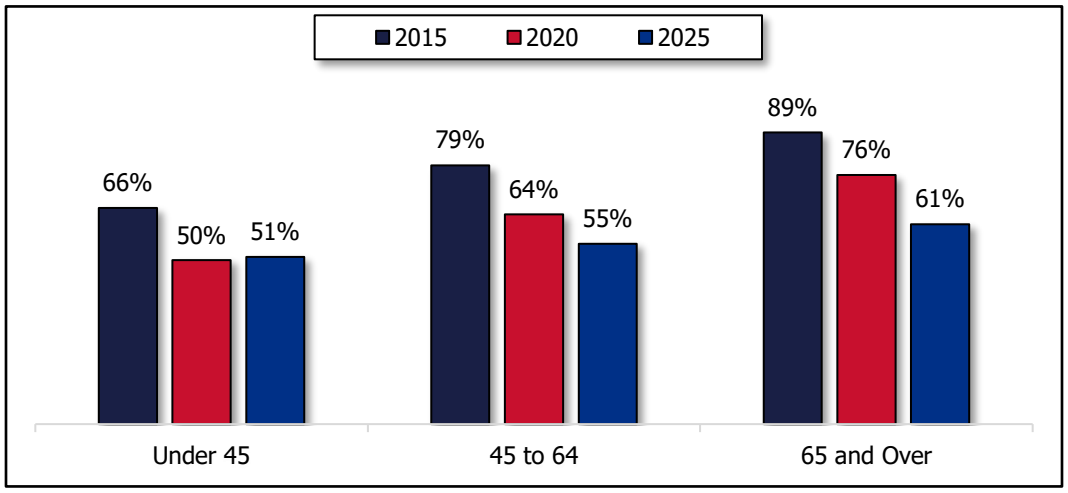
Table 4.4: Mail Share of Total Bills and Statements Received by Households

	2015	2020	2025
Bills	78%	64%	56%
Statements	73%	60%	54%
All	**77%**	**62%**	**55%**

Source: HMS Recruitment Sample.

Figure 4.4 shows the annual share of bills and statements received by mail by age of the householder in 2015, 2020, and 2025. Younger households have, for at least the past decade, received a lower share of their bills and statements by mail. For these younger households, the mail share fell from 66% in 2015 to 50% in 2020 and remained at that level in 2025. For older households, the share has continued to decline steadily over the past five and ten years. Households headed by someone 65 and older saw the largest decline in their mail share, from 89% in 2015 to 61% in 2025. The data suggest that future diversion may slow as all age groups approach the 50% mail share of the youngest households.

Figure 4.4: Mail Share of Bills and Statements Received by Age of Householder

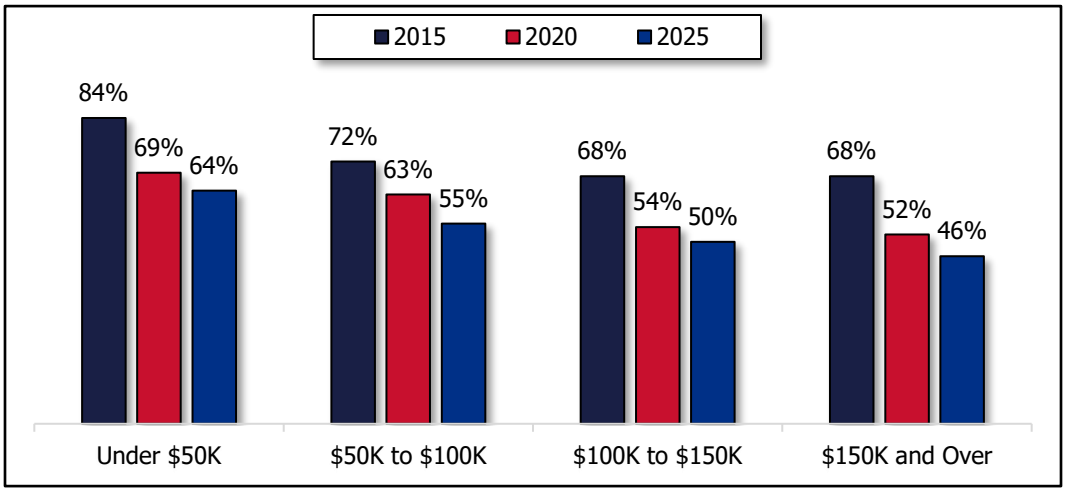


Source: HMS Recruitment Sample.

Figures 4.5 and 4.6 show the share of bills and statements received by mail by household income and education of the householder in 2015, 2020, and 2025. The figures are similar because of the high correlation between income and education. As both income and education increase, the mail share of bills and statements decreases. One reason may be that higher income and higher education households are more likely to have had internet service for a longer period of time and are therefore more familiar with receiving information online. A second reason is that higher income and more educated households receive more bills and statements and so it may be more valuable to spend the time needed to establish online billing/statement arrangements with companies.

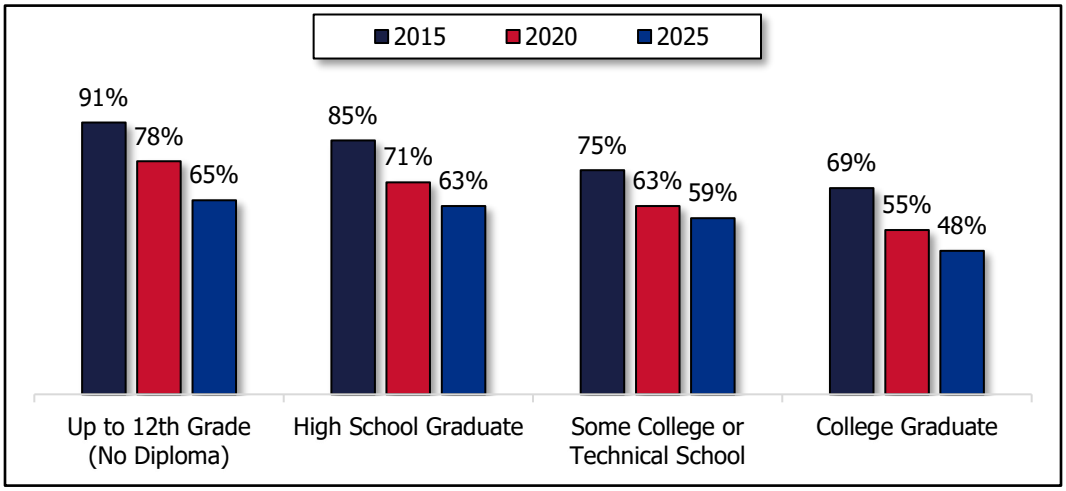
Figures 4.5 and 4.6 also show that regardless of income or education level, the share of bills and statements received by mail declined by roughly 20 percentage points over the past ten years.

Figure 4.5: Mail Share of Bills and Statements Received by Household Income



Source: HMS Recruitment Sample.

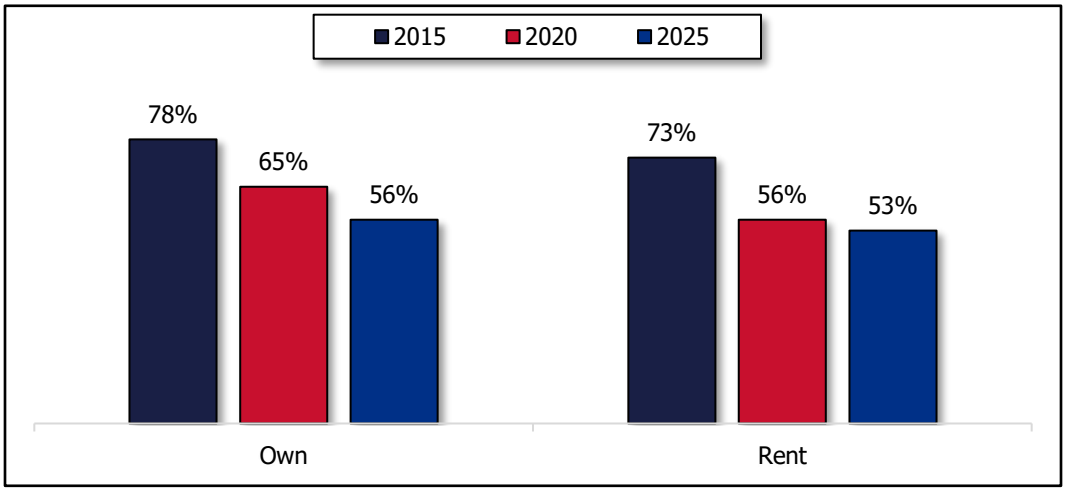
Figure 4.6: Mail Share of Bills and Statements Received by Educational Attainment of Householder



Source: HMS Recruitment Sample.

Figure 4.7 shows the share of bills and statements received by mail for homeowners and renters. In most of the other data in this report, there have been large differences between homeowners and renters. Figure 4.7 is the exception. The mail share of bills and statements received for homeowners in 2025 was 56%, not much different from the 53% share for renters. This is likely due to a combination of offsetting effects. Renters are more likely to be younger than homeowners, and more likely to use digital alternatives to receiving bills and statements by mail. But renters are also likely to have lower incomes than homeowners, which as shown in Figure 4.5 is associated with a higher share of bills and statements received by mail.

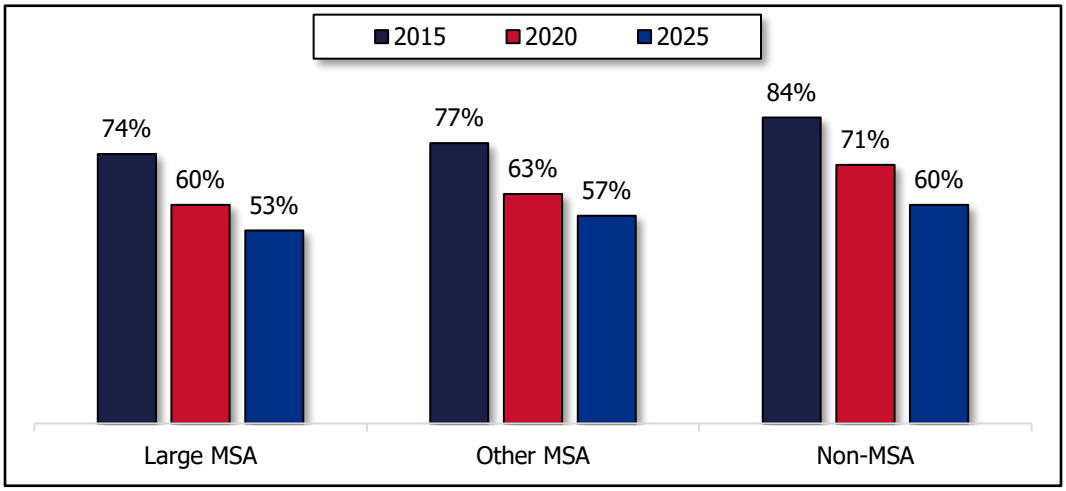
Figure 4.7: Mail Share of Bills and Statements Received by Homeownership



Source: HMS Recruitment Sample.

Figure 4.8 shows that households living outside of an MSA have received a higher share of their bills and statements by mail than more urbanized households. This may be because of a lower quality of internet access in some rural communities, as well as the higher average age of residents in these areas. Yet the mail share has declined the most for households living outside of MSAs and is approaching the lower shares of households living in denser population areas.

Figure 4.8: Mail Share of Bills and Statements Received by MSA Classification



Source: HMS Recruitment Sample.

Table 4.5 reports the main reasons households give for receiving bills and statements by mail. Respondents were asked to pick from six reasons for receiving bills and statements by mail and were allowed to choose more than one reason. In 2025, 56% of households said they receive bills and statements by mail because of the benefit of mail for record keeping, 31% said it is because that is the way they have always done it, 27% said that receiving bills and statements by mail is more convenient than receiving them online, 24% said they have not set up to receive bills and statements online, 22% said it is because the company only sends bills or statements by mail, and 21% said that mail is preferred because they view it as having greater security and privacy.

Table 4.5: Reasons for Receiving Bills and Statements by Mail, FY2025

Reason	Percent of Households
Record keeping	56%
I have always done it this way	31%
Convenience (ease of use/saves time)	27%
I have not set things up to receive bills or statements electronically	24%
Company only sends bills by mail (or does not send them electronically)	22%
Security/Privacy	21%

Source: HMS Recruitment Sample, FY 2025Q2-Q4. Note: Respondents may choose multiple answers.

Household Bill Payments

Household bill payments have been even more impacted than bills and statements received by the shift away from the mail. Table 4.6 shows that the mail share of household bill payments, which was just 31% in 2015, fell to 21% in 2020 and 14% in 2025. During this time, the share of bill payments made electronically, defined as payments made online or through a mobile app and/or by an automatic deduction from a bank account or credit card, has been rising.

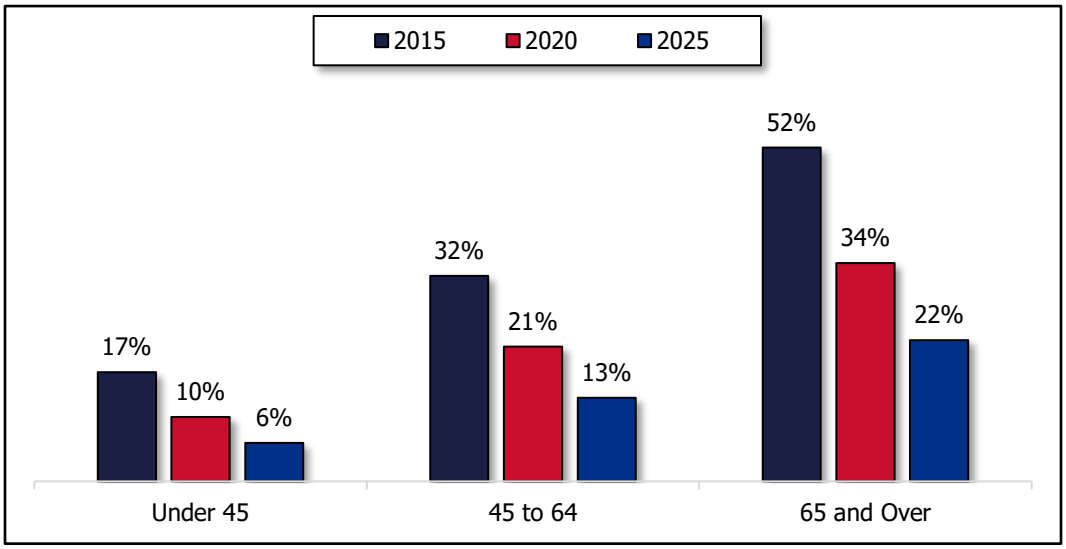
Table 4.6: Bill Payment Shares by Method

Bill Payment Method	Share of Bills Paid by Method		
	2015	2020	2025
Mail	31%	21%	14%
Electronic	62%	73%	77%
In-Person or Telephone	7%	6%	10%
Total	**100%**	**100%**	**100%**

Source: HMS Recruitment Sample. Notes: Values may not sum to totals due to rounding. Electronic includes online, automatic deduction from bank account, and automatic charge to debit or credit card.

Age of the householder is by far the most important demographic variable affecting the mail share of bill payments, as seen in Figure 4.9. Households headed by someone under 45 paid only 6% of their bills by mail in 2025, while households headed by someone aged 45 to 64 paid just 13% by mail. Even among households headed by someone aged 65 or older, the mail payment share was only 22%, just a little over the mail payment share of the youngest households in 2015. There has also been a large decline in the mail payment share of these older households, which has fallen from 52% in 2015.

Figure 4.9: Mail Payment Shares by Age of Householder



Source: HMS Recruitment Sample.

The impact of other demographic factors on the mail share of bill payment is similar to these impacts on the mail share of bills and statements received. Households with higher incomes and higher levels of education have a lower mail payment share. The mail payment shares of homeowners and renters are not much different. Households in less urbanized areas have a somewhat higher mail payment share than households living in an MSA.

Although households pay most of their bills by methods other than the mail, many households continue to use the mail for at least some of their bill payments. Among these households, 42% cite record keeping as one reason they do so, while 29% each cite habit, convenience, and security and privacy concerns. About a quarter report that the biller prefers or requires payments by mail, and 18% say they have not set up alternative payment methods.

Table 4.7: Reasons for Paying Bills by Mail by Households that Pay Bills by Mail, FY2025

Reason	Percent of Households
Record keeping	42%
I have always done it this way	29%
Convenience (ease of use/saves time)	29%
Security/Privacy	29%
Biller prefers/requires payment by mail	25%
I have not set things up to pay electronically	18%

Source: HMS Recruitment Sample, FY 2025Q2-Q4. Note: Respondents may choose multiple answers.

Chapter 5: Advertising Mail

Introduction

Advertising mail includes Marketing Mail, First-Class Mail that contains advertising, and other mail delivered by the USPS that is predominantly advertising. It represented about 62% of all household mail in 2025.

The Advertising Mail Market

As Table 5.1 highlights, the volume of advertising mail has declined by an average of 40% over the last 10 years. In 2015 households received an average of 659 pieces of advertising mail per year. By 2025, the number had fallen to 393 pieces per year. The growth of digital advertising (online, e-mail, social media, text etc.) has been a key driver of the decline in advertising mail received by households. Another key event was the Covid-19 pandemic and the economic and social disruptions it created, which further reduced the amount of advertising mail. Although not shown in Table 5.1, advertising mail has increased in some years since 2015, with a meaningful rebound occurring in 2021 and 2022 as the pandemic's impacts waned.

Table 5.1: Advertising Mail Received by Households, by Mail Classification

(Pieces per Household per Year)

Mail Classification	2015	2020	2025	% Change 2015-2025	% Change 2020-2025
First-Class Mail Advertising	**70.2**	**51.7**	**42.3**	**-40%**	**-18%**
Advertising-Only	34.0	31.3	25.1	-26%	-20%
Secondary Advertising	36.2	20.4	17.2	-52%	-15%
Marketing Mail Advertising	**573.4**	**436.0**	**335.7**	**-41%**	**-23%**
Commercial	472.7	346.6	264.0	-44%	-24%
Nonprofit	100.7	89.4	71.7	-29%	-20%
Other	**15.2**	**15.2**	**14.9**	**-2%**	**-2%**
Total Advertising	**658.9**	**502.9**	**393.0**	**-40%**	**-22%**

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

Most advertising mail is Marketing Mail, with Commercial Marketing Mail representing the largest category with 264 pieces received per household in 2025. Marketing Nonprofit Mail, sent by organizations that qualify for reduced nonprofit postage rates, is the second largest category with 72 pieces per household.

Households received an average of 42 pieces of First-Class advertising in 2025. First-Class advertising includes mailings that were advertising-only, as well as mail in which advertising was included with a mailing having a different purpose, such as a bill or statement. Unless otherwise stated, First-Class advertising mail volumes include both ad-only and ad-enclosed pieces.

Table 5.1 shows that the volume of First-Class advertising has declined 40% since 2015 and 18% since 2020; similar to but slightly smaller than the 41% and 23% declines in Marketing Mail over the same respective periods. This is interesting as one might expect a larger decline in the more expensive First-Class Mail, relative to Marketing Mail. However, the higher level of service provided by First-Class Mail versus

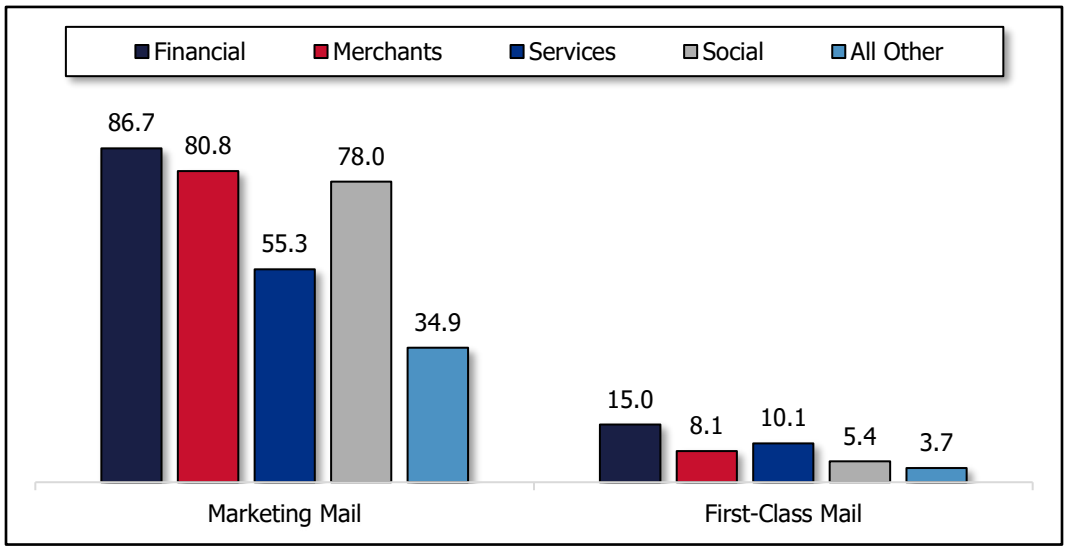
Marketing Mail might sufficiently counterbalance the higher cost to marketers such that they have not shifted away from First-Class Mail in favor of Marketing Mail.

Senders of Advertising Mail

Figure 5.1 shows Marketing Mail and First-Class advertising mail received by households from key mailing industries. In 2025, the financial industry sent the most advertising, via both Marketing Mail and First-Class Mail. Merchants (stores and other retailers) were the second largest senders of Marketing Mail, while social organizations, including charities and political groups, were a close third. Much of this mail is sent at the lower postage rates available to nonprofits only through Marketing Mail, which is one reason why social organization mail is only a small portion of First-Class advertising. The service industry was also a main contributor of advertising mail sent to households, but more so for First-Class Mail than Marketing Mail.

Figure 5.1: Advertising Volumes Received by Households by Sender Industry

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025. Note: First-Class Mail advertising includes advertising-only and advertising enclosed volumes.

Table 5.2 displays industry advertising mail trends over the past decade, revealing that merchants experienced the sharpest decline in advertising volumes since 2015, with a 52% reduction. A key factor driving the decline in advertising mail sent by merchants was the closing of many brick-and-mortar retail stores over the past decade as consumers have shifted from in-store shopping to online purchases. In contrast, the mail from social organizations saw the smallest decrease, with volumes shrinking by 22% over the same period. Note that because Table 5.2 shows per household measures, the growth in the total number of U.S. households over time mitigates some of the loss in total advertising mail.

Table 5.2: Volumes of Marketing Mail and First-Class Ads by Industry

(Pieces per Household per Year)

Sender Type	2015	2020	2025	% Change 2015-2025	% Change 2020-2025
Financial	153.7	121.3	101.7	-34%	-16%
Merchants	183.8	114.2	88.9	-52%	-22%
Services	121.6	88.2	65.4	-46%	-26%
Social	106.8	100.9	83.4	-22%	-17%
All Other	77.7	63.0	38.6	-50%	-39%

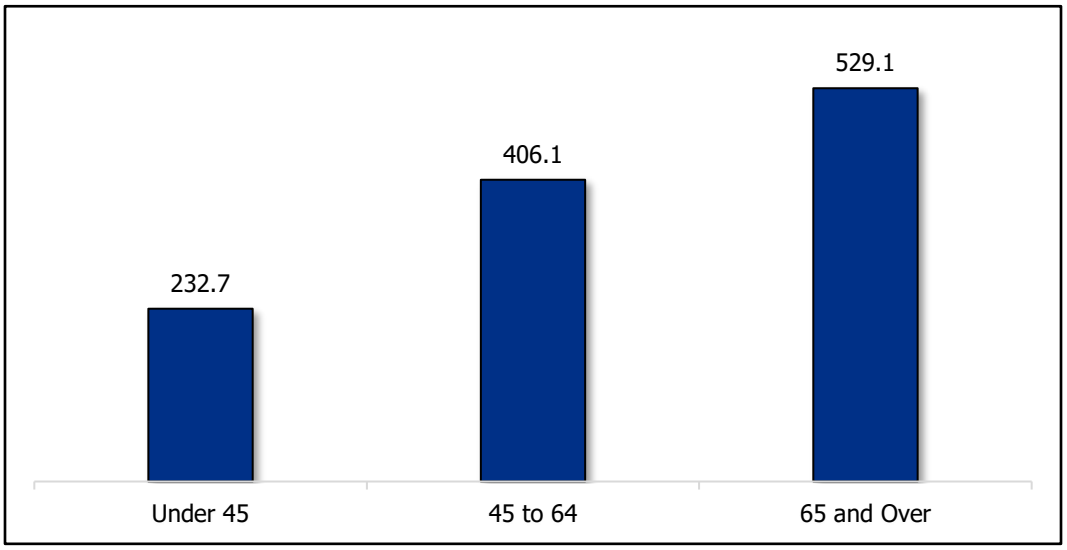
Source: HMS Diary Sample. Note: Includes Marketing Mail and First-Class Mail advertising.

Advertising Mail and Household Demographics

The following figures and tables show 2025 advertising mail volumes per household across different household demographics. Figure 5.2 shows that the age of the householder is a key factor affecting advertising mail received. Households headed by someone aged 65 and over received an average of 529 pieces of advertising mail in 2025, 2.3 times as much as the 233 pieces received by households headed by someone under 45. Several factors explain this difference. First, younger households are likely less responsive than older households to advertising in the mail, leading marketers to send more mail to older households. Second, older households have a longer buying history and have had more time for marketers to develop relationships with these customers. Third, age is correlated with income and homeownership, two other factors which will be shown to impact the amount of advertising mail received.

Figure 5.2: Advertising Mail Received by Age of Householder

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025. Note: Includes Marketing Mail and First-Class Mail advertising.

Table 5.3 shows trends in advertising mail received across the three age groups. Unsurprisingly, younger age groups all witnessed steeper declines in advertising mail received than their older counterparts over the last decade. The under 45 age group experienced the largest decline from 2015 to 2025, with volumes reduced to roughly half of what they were in 2015. Households in the 65 years or older age group received 37% less

advertising mail than ten years ago. The difference in the decline is likely explained by marketers' reaction to younger generations' preference for digital media.

However, this age-related pattern is less apparent during the period from 2020 to 2025, when all age groups experienced volume declines between 20% and 25%. In part this may be because the recovery following the pandemic impacted the volumes of younger households more, as they were the households that saw the largest declines in the 2015 to 2020 period. Regardless, younger households still had the largest percentage decline of any age group over the past five years.

Table 5.3: Advertising Mail Received by Age of Householder

(Pieces per Household per Year)

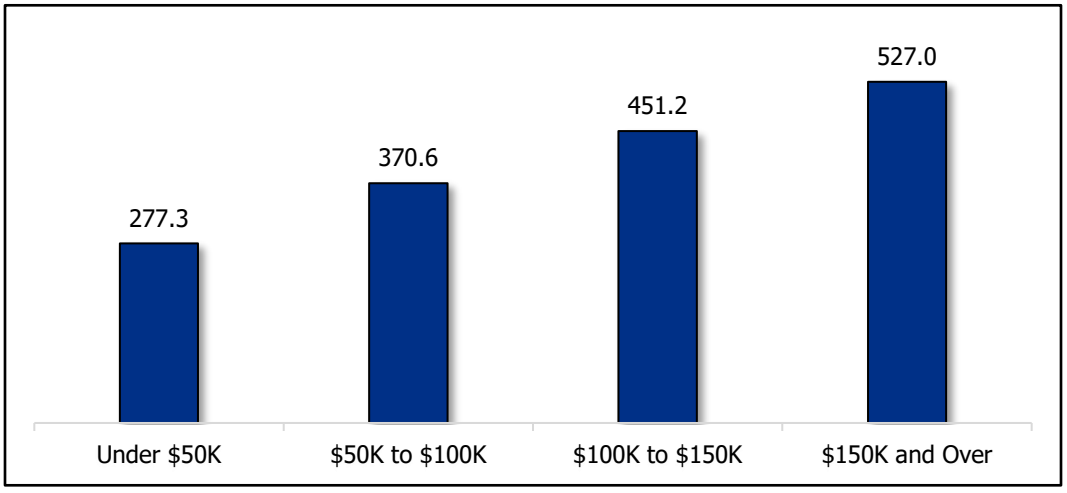
Age of Householder	2015	2020	2025	% Change 2015-2025	% Change 2020-2025
Under 45	477.3	311.6	232.7	-51%	-25%
45 to 64	685.9	510.2	406.1	-41%	-20%
65 and Over	841.0	685.6	529.1	-37%	-23%
All Households	**643.6**	**487.7**	**378.0**	**-41%**	**-22%**

Source: HMS Diary Sample. Note: Includes Marketing Mail and First-Class Mail advertising.

Given that advertising mail is used to sell goods and services, it is not surprising that the volume of advertising mail received by households is closely tied to their income. As Figure 5.3 illustrates, in 2025, the relationship between advertising mail and household income was quite strong. As an example, households with incomes of $150,000 or more received about twice as many pieces of advertising mail per year as those earning less than $50,000, roughly 50% more than households with incomes between $50,000 and $100,000, and 17% more than households with incomes between $100,000 and $150,000.

Figure 5.3: Advertising Mail Received by Household Income

(Pieces per Household per Year, FY2025)



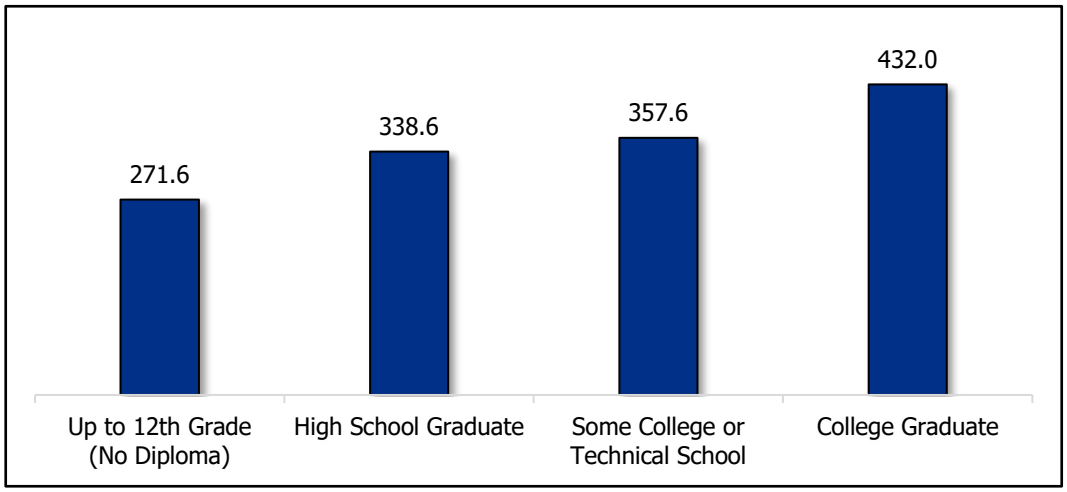
Source: HMS Diary Sample, FY 2025. Note: Includes Marketing Mail and First-Class Mail advertising.

Figure 5.4 shows that education also relates to the volume of advertising mail received, with pieces per household rising with increasing levels of education. This is likely due to more educated households having higher incomes, and in fact, higher prospective incomes as well. A college graduate who currently has a

relatively low income may, in a few years, earn a much higher income, and become a more attractive customer for marketers.

Figure 5.4: Advertising Mail Received by Educational Attainment of Householder

(Pieces per Household per Year, FY2025)

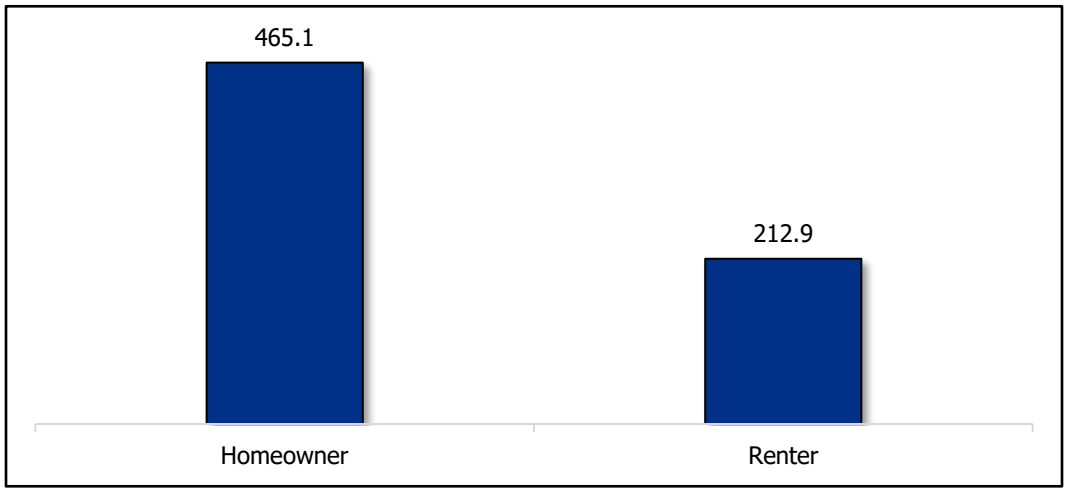


Source: HMS Diary Sample, FY 2025. Note: Includes Marketing Mail and First-Class Mail advertising.

Homeownership also has a strong relationship to the amount of advertising mail received by households. As shown in Figure 5.5, homeowners received more than twice as many pieces of mail as renters in 2025, at 465 pieces per household vs. renters' 213 pieces. Much of this relationship is due to higher income and older average age of homeowners compared to renters. However, it is also the case that homeowners, being less likely to move in any given year than renters, represent a more stable demographic for reaching customers through delivery of advertising mail to their residence.

Figure 5.5: Advertising Mail Received by Homeownership

(Pieces per Household per Year, FY2025)



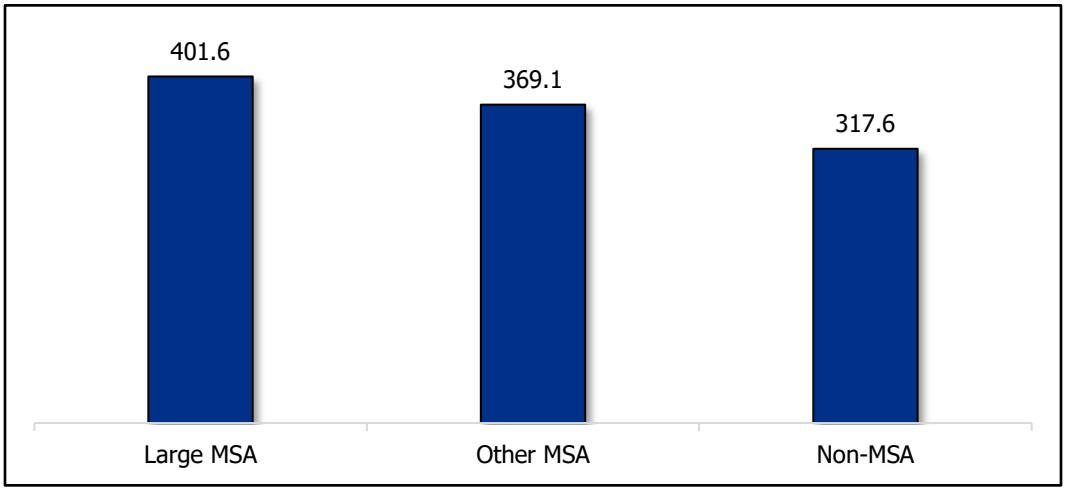
Source: HMS Diary Sample, FY 2025. Note: Includes Marketing Mail and First-Class Mail advertising.

Figure 5.6 shows that advertising mail volumes are tied to the level of urbanicity, with households living in one of the large MSAs (Metropolitan Statistical Areas) receiving about a quarter more advertising mail

than households living outside an MSA. One reason for this may be that densely populated areas make it easier for direct mailers to satisfy mailing requirements that provide discounts for bulk mailings, such as a minimum number of pieces per ZIP code or carrier route.

Figure 5.6: Advertising Mail Received by MSA Classification

(Pieces per Household per Year, FY2025)

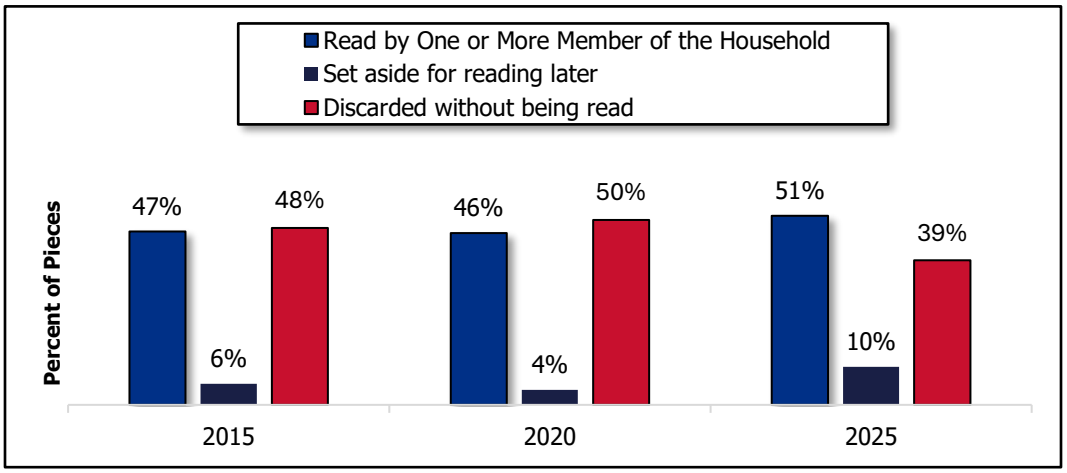


Source: HMS Diary Sample, FY 2025. Note: Includes Marketing Mail and First-Class Mail advertising.

Attitudes toward Advertising

The HMS reveals that most households either read their advertising mail pieces or set them aside for reading later. Figure 5.7 shows that one or more household members read 51% of the advertising pieces the household received in 2025, up from the 46% reading rate in 2020 and the 47% rate in 2015. In 2025, 10% of mail pieces were set aside for reading later. That means that 61% of all advertising pieces received at least some attention from the household, with 39% of pieces being discarded without being read. The share of advertising mail that was discarded in 2025 was about 10% lower than the shares in 2015 and 2020.

Figure 5.7: Advertising Mail Reading Trends

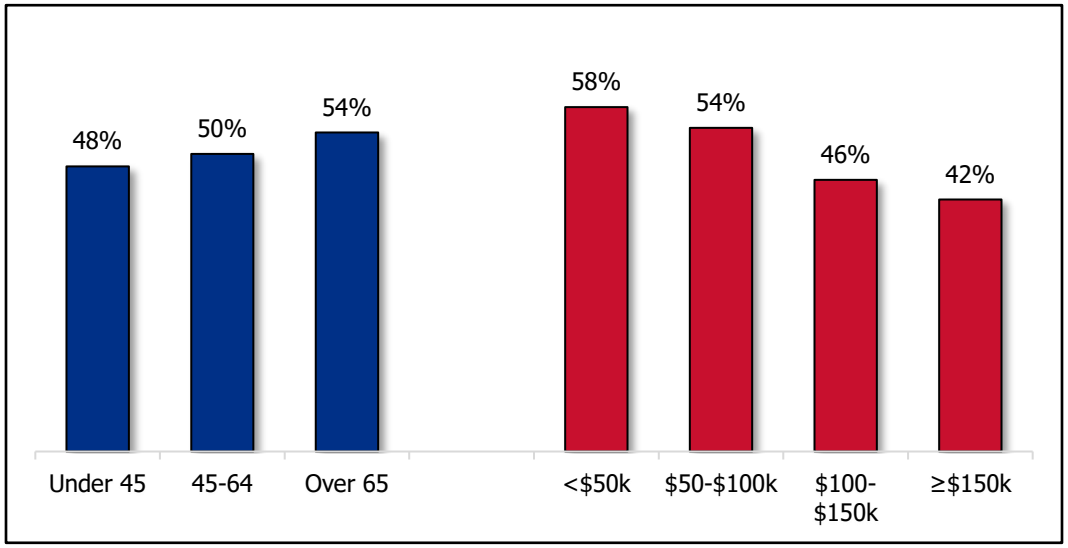


Source: *HMS Diary Sample. Note: Includes Marketing Mail and First-Class Mail advertising. Mail pieces for which reading treatment was not provided are excluded.*

One reason why advertising mail reading rates have increased may be that the decline in volume has allowed each individual piece of advertising mail to gain more attention from households. Moreover, past volume declines could reflect better targeting by marketers that allows them to focus their mailings on households most likely to read the advertisement.

Figure 5.8 illustrates how household demographics can influence advertising reading rates. On the left side of the chart, we see that the age of the householder is tied to the percentage of advertising mail pieces that are read. On the right side of the chart, we see that low-income households reported reading a larger share of advertising than higher income earners. This was likely related to a previous finding that higher income households tend to receive more advertising mail (see Figure 5.3). With more ads received, higher income households may be less likely to read any individual piece. Households earning more than $150,000 read only 42% of their ad mail, compared with around 58% for households with incomes less than $50,000.

Figure 5.8: Advertising Mail Reading Rates by Household Demographics, FY2025



Source: HMS Diary Sample, FY 2025. Note: Includes Marketing Mail and First-Class Mail advertising.

Effectiveness of Advertising Mail

Ultimately, advertisers send direct mail because it works — household members read and respond to it. For each piece of advertising a respondent records in their diary, the HMS asks them to rate, on a scale of 1 to 10, with 10 being the highest, the likelihood that household members will respond by buying a product or service, or, if applicable, making a donation as a result of seeing that ad. Table 5.4 shows the percentage of advertising mail pieces to which the household is very likely, somewhat likely, and unlikely to respond , where very likely is defined as pieces given a score of 8 or above, somewhat likely contains scores of 5 to 7, and unlikely contains scores of less than 5. Note that the likelihood of response question was only asked in Postal quarters 2 through 4 of 2025.

Households reported that they were very likely to respond to 19% of Nonprofit Marketing Mail pieces, 15% of First-Class advertising pieces, and 12% of Commercial Marketing Mail pieces. Note the better response rate for First-Class advertising versus Commercial Marketing Mail might offset the higher postage cost of sending First-Class Mail. Overall, households are very likely to respond to 14% of all advertising, somewhat likely to respond to 15%, and unlikely to respond to 71%.

Table 5.4: Likelihood of Responding to Piece of Advertising on a Scale of 1 to 10

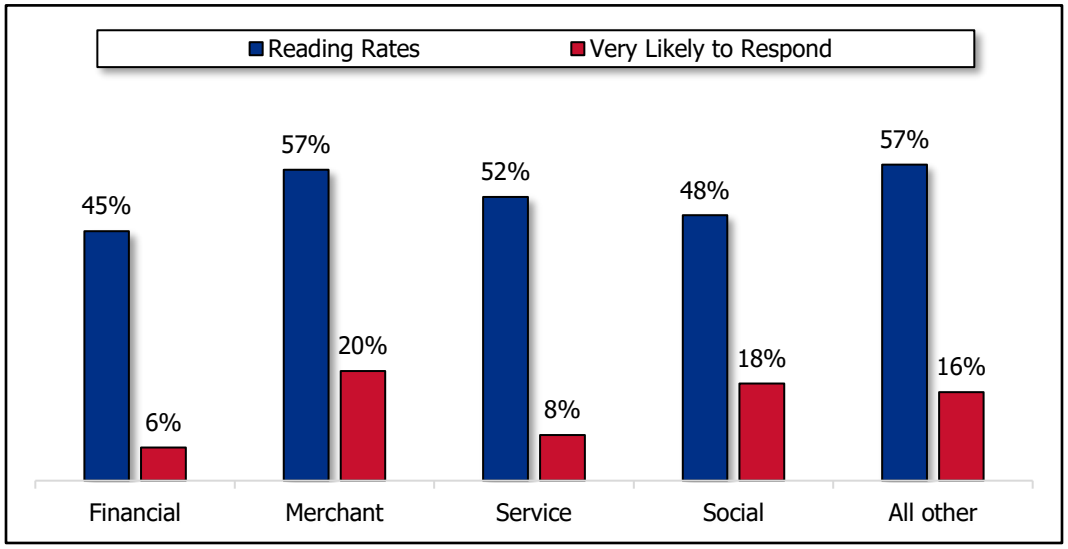
(Percentage of Pieces, FY2025)

Ad type	Very Likely (8-10)	Somewhat Likely (5-7)	Unlikely (1-4)
First-Class	15%	14%	71%
Commercial Marketing	12%	14%	75%
Nonprofit Marketing	19%	21%	60%
All Advertising	14%	15%	71%

Source: HMS Diary Sample, FY 2025Q2-Q4. First Class includes ad only and ad enclosed.

Figure 5.9 shows the share of mail pieces read (reading rates) and the share of pieces for which a response was rated very likely (response rates) for advertising mail from different industries. The financial industry had both the lowest reading and response rates. Merchants had both the highest reading and response rates. A good portion of merchant advertising mail consists of catalogs.

Figure 5.9: Advertising Mail Reading and Response Rates by Sender Industry, FY2025



Source: HMS Diary Sample, FY 2025. Note: Includes Marketing Mail and First-Class Mail advertising.

Table 5.5 illustrates how the existence of a past business relationship between the mailer and the recipient can impact the effectiveness of advertising mail.[3] Advertising mail sent to a recipient with whom the business had a prior relationship (e.g., a previous or existing customer) was around twice as likely to be read, 64% of pieces vs. 36%, than mail sent when there was no past business relationship. The difference in response rates was even greater, with mail sent to existing customers registering a 25% very likely to respond rate compared to just 3% for prospecting ad mail. Yet, despite the lower reading and response rates for mail sent to prospects, the fact that some of this mail is read and responded to is crucial for businesses' efforts to expand their customer base.

[3] Note that we consider only Marketing Mail in Tables 5.5 and 5.6 and the discussion thereof, as the diary survey does not ask about the past relationship with the sender for other types of advertising mail. Table 5.6 also excludes nonprofit marketing mail, as such mail typically would not include a coupon.

Table 5.5: Reading and Response Rates to Marketing Mail Advertising by Past Relationship

(Percentage of Pieces, FY2025)

Past Business Relationship with Recipient	Reading Rate	Very Likely to Respond (8–10)
Existing Customers	64%	25%
Prospects	36%	3%
All Recipients	**50%**	**13%**

Source: HMS Diary Sample, FY 2025Q2–Q4. Note: Mail pieces for which reading or response treatment were not provided are excluded.

One way that marketers have found to increase the response rate for advertising mail is to include a coupon within the mailing. Table 5.6 shows that the presence of a coupon doubles the likelihood of a response for Commercial Marketing Mail sent to existing customers and prospects alike. For existing customers, coupons increase the response rate to 37% compared to 18% for pieces without a coupon. For prospects, a coupon increases the likely response rate from 2% to 5%.

Table 5.6: Response Rates to Commercial Marketing Mail Advertising by Past Relationship and Presence of a Coupon

(Percentage of Pieces, FY2025)

Coupon and Past Business Relationship	Likely to Respond (8–10)
Coupon	**20%**
Existing Customer	37%
Prospect	5%
No Coupon	**8%**
Existing Customer	18%
Prospect	2%
All Recipients	**12%**

Source: HMS Diary Sample, FY 2025Q2–Q4. Note: Mail pieces for which reading or response treatment were not provided are excluded.

As illustrated earlier in Figure 5.3, higher income households received more advertising mail than low-income households. Table 5.7 combines the yearly volume of advertising mail received by each income group with the respective "Very Likely to Respond" rates reported in Table 5.4. The results present the average number of likely responses per year for each income level.

As the table illustrates, households with incomes greater than $100,000 have a lower response rate than lower income households, stating that they are very likely to respond to 12% of the advertising pieces received. However, these households also receive the most advertising pieces. Consequently, despite their lower response rate, the total number of potential responses of around 50 to 54 per year is higher than for the other income groups.

Table 5.7: Yearly Number of Potential Responses Household by Income, FY2025

Household Income	Ad Pieces Received per Household	Share Very Likely to Respond (8-10)	Total Potential Responses per Household
Under $50K	254.4	16%	40.1
$50K to $100K	335.4	14%	46.7
$100K to $150K	413.6	12%	50.5
$150K and Over	461.6	12%	54.3
All households	344.5	14%	46.9

Source: HMS Diary Sample, FY 2025Q2-Q4. Note: Includes Marketing Mail and First-Class Mail advertising.

Being likely to respond does not always lead to actual responses, but the data presented in Table 5.5 and Figure 5.9 help explain why direct mail is a popular choice for advertisers in the U.S.

Chapter 6: Periodicals

Introduction

Periodical mail consists of newspapers, magazines, and other publications sent to households, typically as part of a subscription. This chapter analyzes only periodicals delivered by the Postal Service to households. Respondents to the HMS are asked not to include newspapers or magazines delivered by a local carrier or purchased at a newsstand or store in their mail diaries. Periodicals represented about 3% of all household mail in 2025.

Periodicals Mail Volume

Periodicals mail volume has been in decline for more than two decades as print circulation has been replaced with online publications and the availability of information on the internet. As Table 6.1 illustrates, the volume of periodicals has continued to fall over the last 10 years, dropping from 40 pieces per household in 2015 to 22 pieces per household in 2025.

Table 6.1: Postal Service Periodical Type by Year

(Pieces per Household per Year)

Periodical Type	2015	2020	2025	% change 2015-2025	% change 2020-2025
Magazines	31.0	21.0	13.1	-58%	-38%
Newspapers	5.7	6.1	5.7	1%	-7%
Other	3.3	2.4	3.0	-8%	25%
Total Periodicals	**40.0**	**29.6**	**21.9**	**-45%**	**-26%**

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

In 2025, households received an average of 13 magazines, 38% less than in 2020 and 58% less than in 2015. Despite these declines, magazines still account for 60% of all periodicals sent via the Postal Service.

Households received an average of 5.7 newspapers per year in 2025, 26% of all periodicals received. The volume of newspapers has been relatively stable when compared to 2015 and 2020. The largest decline in newspaper circulation occurred in the early part of the 2000s.

Other periodicals consist of publications such as newsletters or pamphlets. Households received an average of 3 "other periodicals" in 2025, representing about 14% of all periodicals received by households.

As Table 6.2 highlights, the main driver of the decrease in the volumes of periodicals is the reduction in the share of households reporting any periodicals. Only 25% of households reported receiving at least one periodical during their survey week in 2025, down from 39% in 2015. However, for households that do receive Periodicals, volume declined a modest 13%, falling from 102 pieces in 2015 to 88 pieces in 2025.

Table 6.2: Households that Received Any Periodicals during their Survey Week

	2015	2020	2025
Share of Households that Received any Periodicals	39%	30%	25%
Annual Volume per Household that Received Periodicals	101.9	98.4	88.4

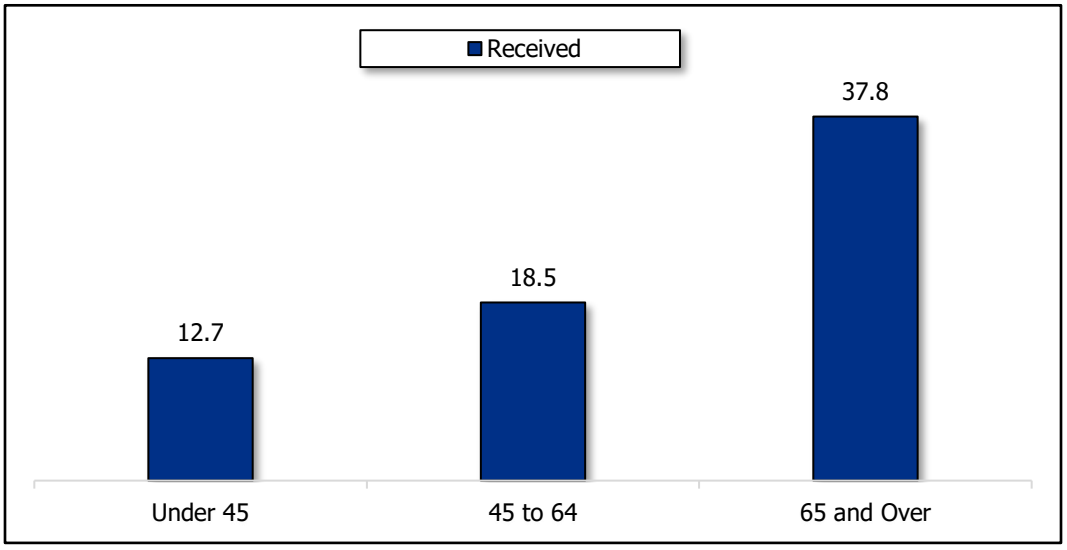
Source: HMS Diary Sample.

Periodicals Mail and Household Demographics

Figure 6.1 shows that periodicals mail is highly correlated with age. Households in which the householder is 65 years old or older received an average of 38 periodicals per year, twice as many as the 45 to 64 age group and three times as many as the under 45 age group.

Figure 6.1: Periodicals Received by Age of Householder

(Pieces per Household per Year, FY2025)



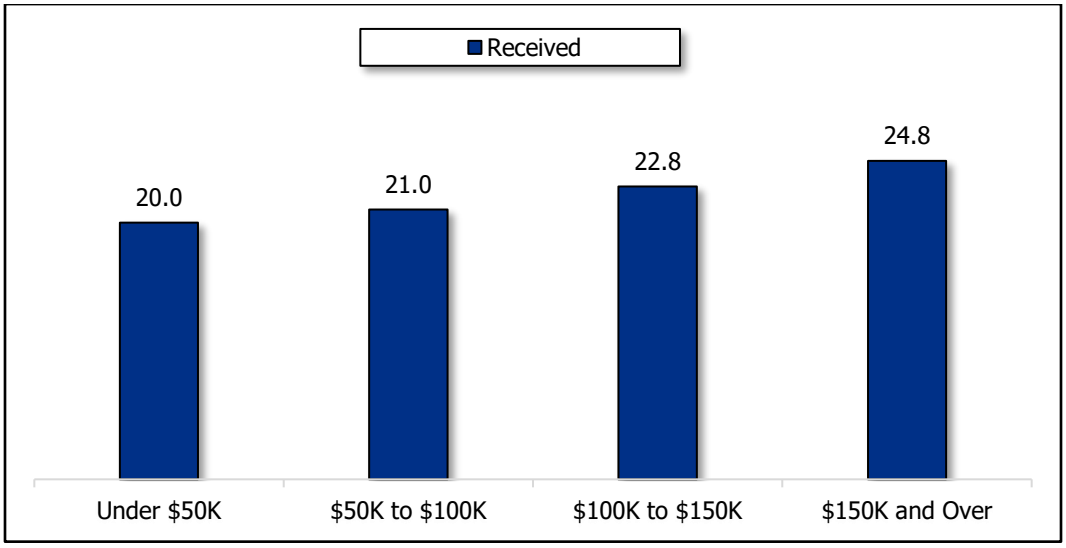
Source: HMS Diary Sample, FY 2025

Householders 65 and over received three times as many periodicals as householders under 45.

Figure 6.2 presents periodicals volume by household income group. There is a small positive correlation between income and periodicals volume. Households with incomes above $150,000 received an average of about 25 periodicals in 2025 compared to an average of 20 for households that earned less than $50,000.

Figure 6.2: Periodicals Received by Household Income

(Pieces per Household per Year, FY2025)

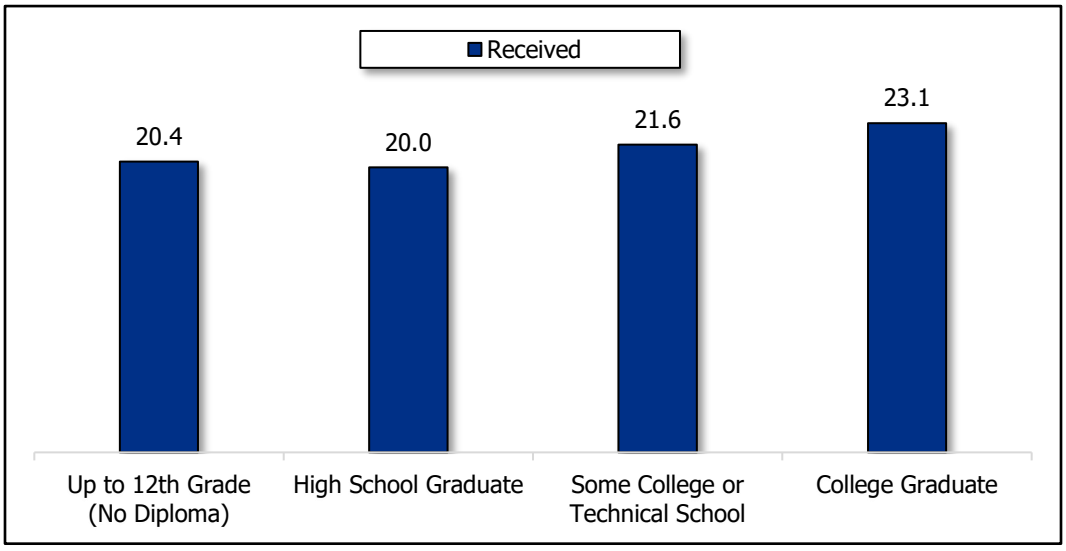


Source: HMS Diary Sample, FY 2025.

The relationship between periodicals and education is similar to that of income, with a slight tendency of households headed by someone with a higher level of educational attainment to receive more periodicals than those with a lower level of educational attainment.

Figure 6.3: Periodicals Received by Educational Attainment of Householder

(Pieces per Household per Year, FY2025)

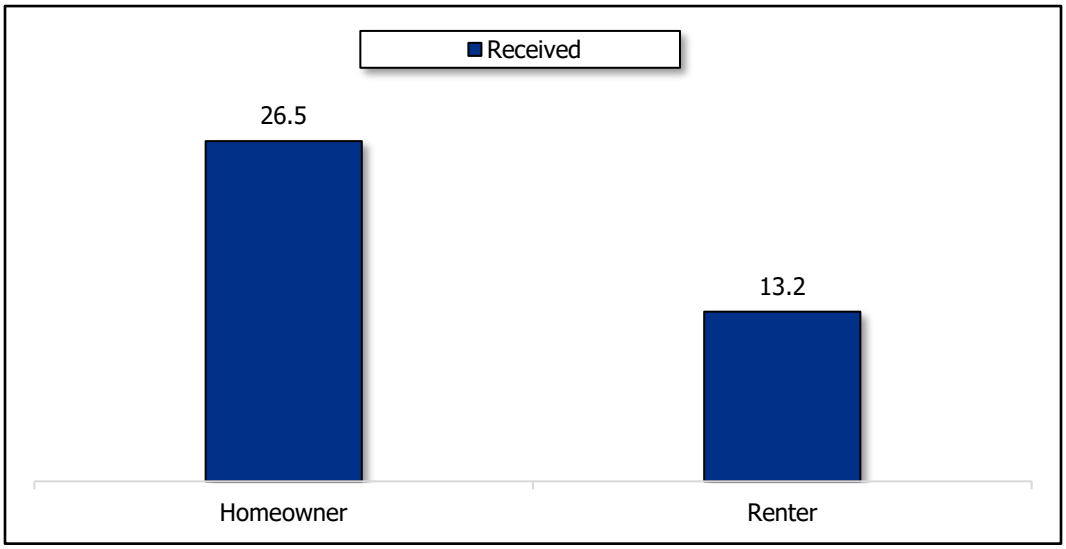


Source: HMS Diary Sample, FY 2025.

Figure 6.4 illustrates the large difference in the number of periodicals received by homeowners and renters. Households of homeowners received twice as many periodicals, an average of 27 per year, compared to renters who received an average of 13 per year.

Figure 6.4: Periodicals Received by Homeownership

(Pieces per Household per Year, FY2025)

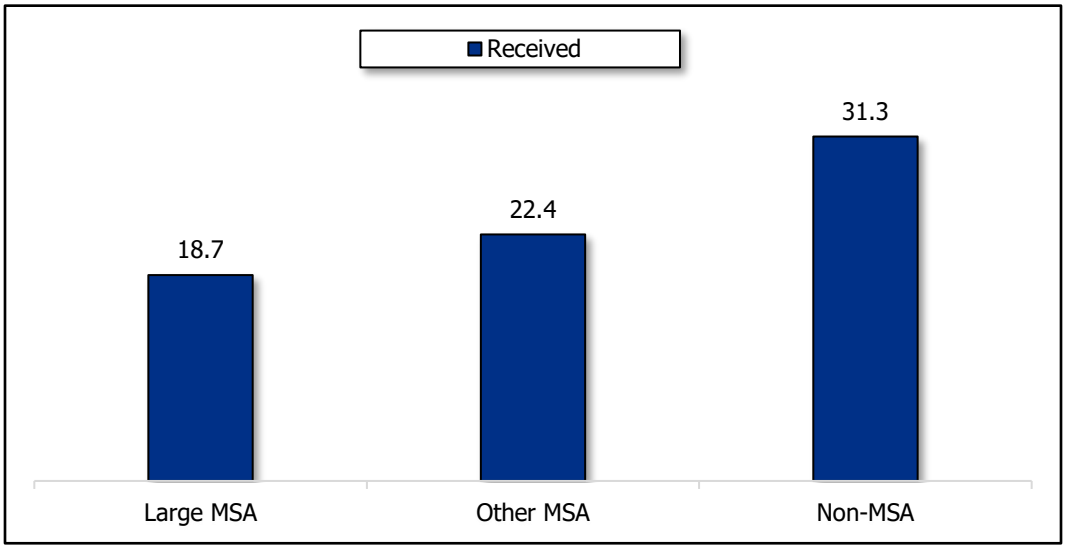


Source: HMS Diary Sample, FY 2025

An interesting finding from Figure 6.5 is that households living outside of an MSA received about 67% more periodicals per household than were received by households living in large urban areas. This is likely in part because in these areas postal delivery of periodicals is more common than delivery from private companies that choose not to provide service to less densely populated communities.

Figure 6.5: Periodicals Received by MSA Classification

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

Table 6.3 shows that the largest declines in periodicals received have occurred in more urban areas. From 2015 to 2025, households living in large MSAs saw their volume of periodicals fall by 54%. Meanwhile, households living outside an MSA had volumes fall by 37%. Put differently, in 2015, households living

outside of an MSA received 24% more periodicals than households living in a large MSA (50 vs 40). By 2025, the difference had grown to 67% (31 vs. 19).

Table 6.3: Periodicals Received by MSA Classification

(Pieces per Household per Year)

Metro Area Classification	2015	2020	2025	% change 2015-2025	% change 2020-2025
Large MSA	40.3	28.7	18.7	-54%	-35%
Other MSA	37.1	27.0	22.4	-40%	-17%
Non-MSA	49.9	43.0	31.3	-37%	-27%
All Households	**40.0**	**29.6**	**21.9**	**-45%**	**-26%**

Source: HMS Diary Sample.

Chapter 7: Packages

Introduction

This chapter discusses packages received and sent by households using the U.S. Postal Service.[4] Note that packages sent or received from a household as part of the operation of a home business are not included here, as respondents are asked not to include any mail or packages received or sent for a home business in their diary. Packages can be mailed via the U.S. Postal Service using a variety of products and at rates that are based on weight, shape, and other relevant factors. Packages received and sent represented about 7% of total household mail in 2025.

Postal Service Package Volume

Table 7.1 displays package volumes received or sent by households for 2015, 2020, and 2025. Unlike other types of mail, USPS package volumes received by households have increased over the past ten years, up 36% from about 30 pieces per household in 2015 to almost 40 in 2025. The increase in packages received is a direct result of the rapid growth in online shopping over this period, driven in part by the surge in online shopping during the Covid-19 pandemic. For that reason, the growth in packages received occurred from 2015 to 2020, which was then followed by a smaller decline in volumes from 2020 to 2025 as online shopping activity slowed with the end of the pandemic.

Households receive far more packages than they send. In 2025, households sent an average of 4.8 packages. This volume was 3% above the volume in 2015 but 8% lower than the volume in 2020.

Combining packages received and sent and adjusting for the fact that household-to-household packages are included in both the received and sent totals, total household package volume was 42 pieces per household in 2025. That is 29% higher than in 2015 but 12% lower than in 2020.

Table 7.1: Total Postal Service Package Volumes

(Pieces per household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
Received	29.3	43.9	39.8	36%	-10%
Sent	4.6	5.2	4.8	3%	-8%
Total	32.1	47.0	41.5	29%	-12%

Source: HMS Diary Sample. Note: Total is adjusted for double count of packages sent and received between households.

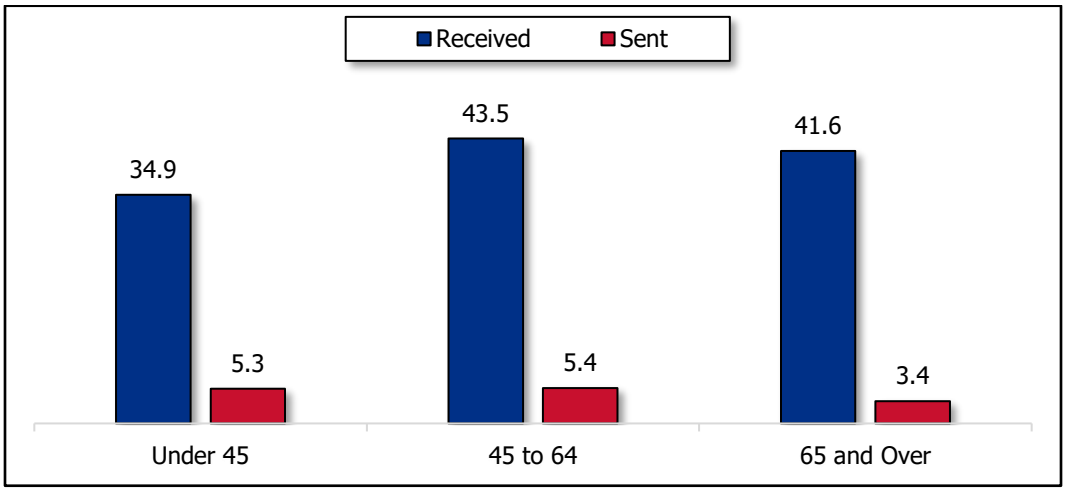
[4] Households are asked to record in their diary all packages they receive or send, regardless of the shipper. Packages discussed in this chapter are the subset of those received or sent for which the respondent selected USPS when asked for the delivery company, and packages received that were determined to have markings associated with a service from USPS in cases where the respondent did not identify a delivery company.

Packages and Household Characteristics

Householder age has a much smaller impact on package volumes than it does on other types of mail. As shown in Figure 7.1, households headed by someone between 45 and 64 years of age receive and send more packages than either their younger or older counterparts, but differences across age groups are not large. While older households typically have higher incomes than younger households, younger households may be more familiar with using the internet for online shopping. Interestingly, older households sent fewer packages than younger households.

Figure 7.1: Package Volumes by Age of Householder

(Pieces per Household per Year, FY2025)



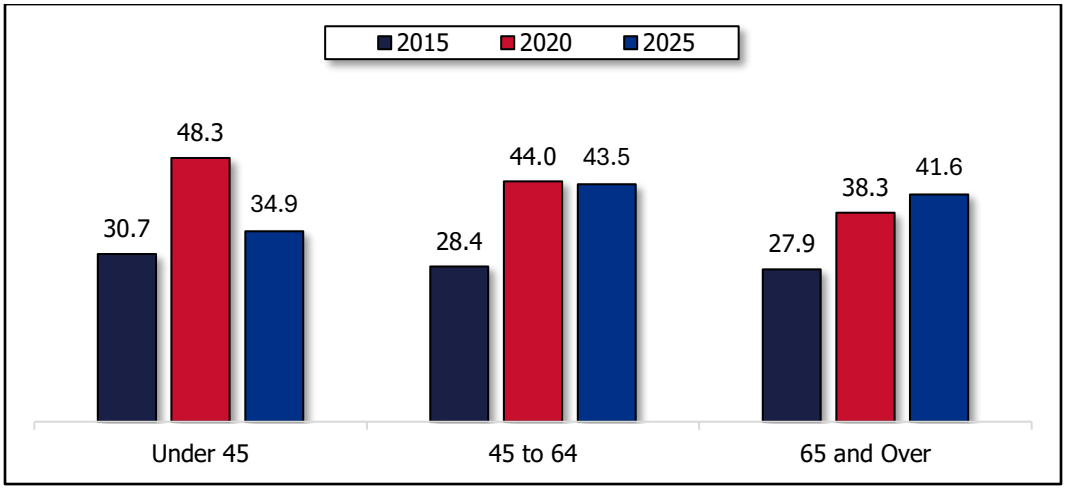
Source: HMS Diary Sample, FY 2025.

Figure 7.2 shows that the increase in packages received from 2015 to 2020 occurred across all age groups. The decline in packages received from 2020 to 2025 was due to declines among younger households (under age 45) who saw their average volume fall from about 48 pieces per year to 35 pieces per year. During that same period, package volumes of the 45 to 64 age group were flat, while volumes increased for households in the 65 and older age group.

One likely explanation for the pattern of these differences is that in 2020, as the pandemic set in, younger, more technologically experienced households were better able to use online shopping, hence the larger increase in package volumes received for this age group compared to older age groups. By 2025, older households had become more adept at online shopping, at which point household package volumes were determined less by technological experience and more by the impact of income and other demographic factors that contribute to older households receiving more packages than younger households.

Figure 7.2: Packages Received by Age of Householder

(Pieces per Household per Year)

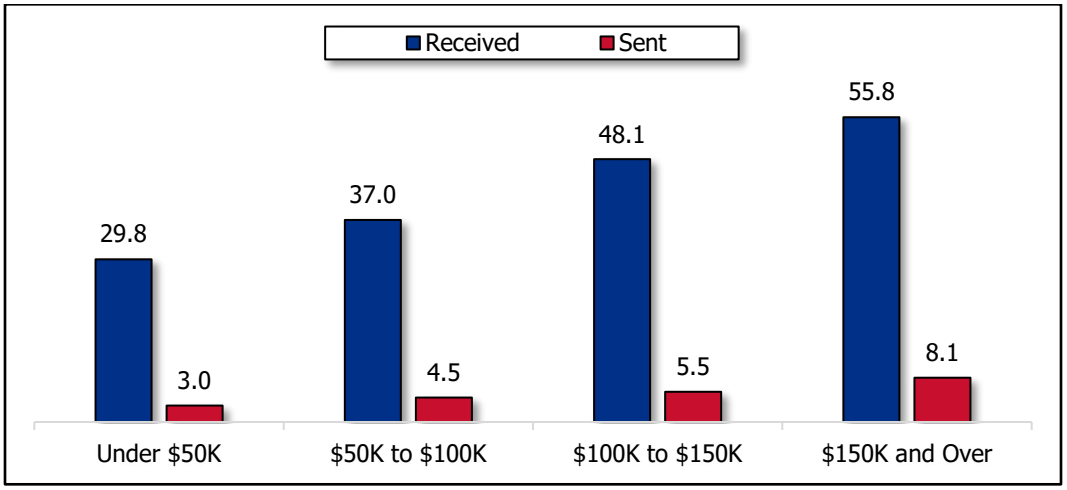


Source: HMS Diary Sample.

Figure 7.3 shows the impact of household income on package volumes, with higher-income households receiving and sending more packages than lower-income households. The strong relationship between income and package volumes supports the theory that, as all age groups become comfortable with online shopping, higher incomes can lead to older households receiving more packages than younger.

Figure 7.3: Package Volumes by Household Income

(Pieces per Household per Year, FY2025)

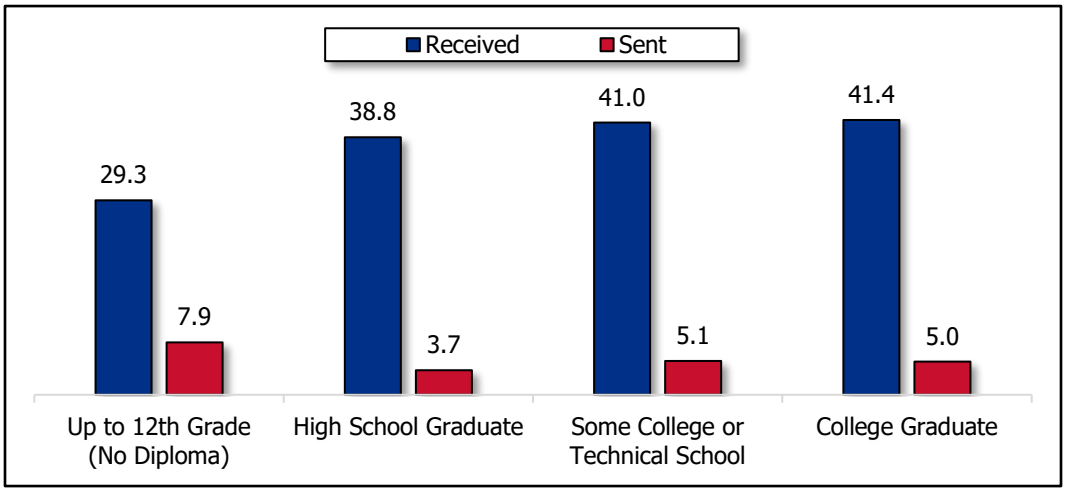


Source: HMS Diary Sample, FY 2025.

Figure 7.4 illustrates the impact of education on the number of packages received and sent by households. Packages received increased as educational attainment of the householder increased, though the differences were smaller than those seen for increases in income. For packages sent, volume is higher for householders with greater educational attainment, such as those with some college or technical school education and college graduates, and lower for high school graduates. However, a curious result is that householders with the lowest educational attainment sent the most packages in 2025. Most likely this is an anomaly resulting from the small sample size of lower-education households, as the result does not occur in earlier years.

Figure 7.4: Package Volumes by Educational Attainment of Householder

(Pieces per Household per Year, FY2025)

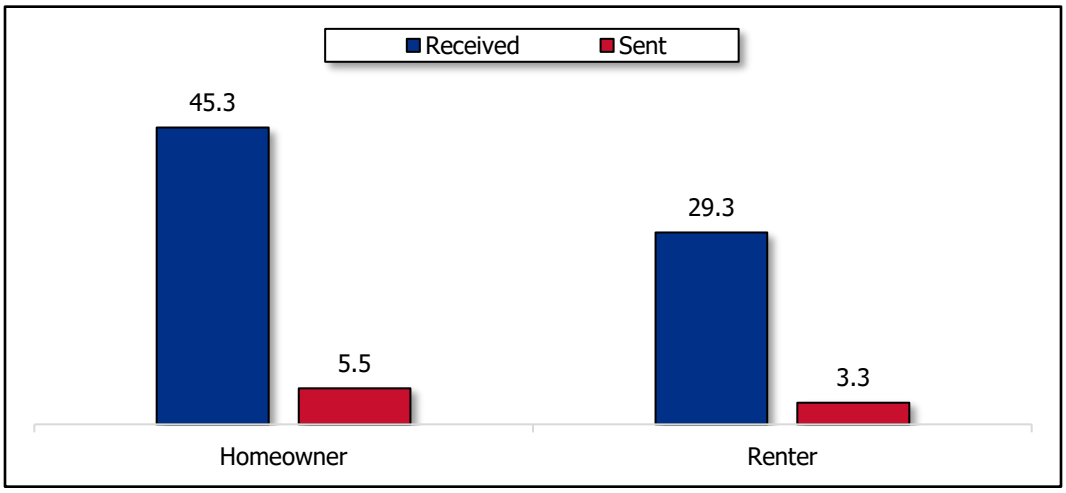


Source: HMS Diary Sample, FY 2025.

Homeowners and renters had noticeable differences in the number of packages received and sent as shown in Figure 7.5. Homeowners received 55% more packages and sent 67% more packages than renters.

Figure 7.5: Package Volumes by Homeownership

(Pieces per Household per Year, FY2025)

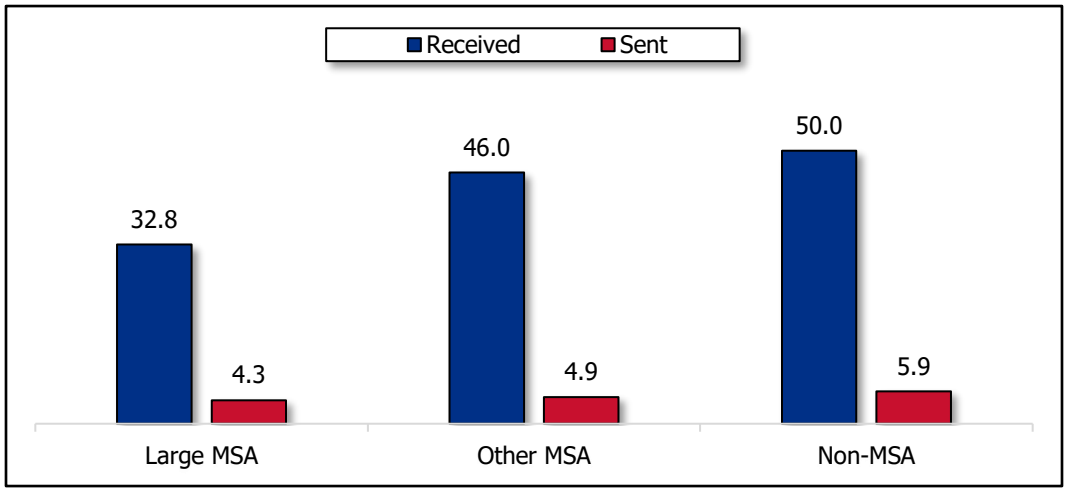


Source: HMS Diary Sample, FY 2025.

Figure 7.6 shows that households in less densely populated areas (non-MSA) received and sent more USPS-delivered packages than households in more densely populated MSAs. The non-MSA households received an average of 52% more packages than households living in large MSAs, and 9% more packages than households living in other MSAs. Similarly, non-MSA households sent on average 37% more packages than households living in large MSAs, and 20% more than households living in other MSAs. The fact that USPS competitors do not always provide as many services to less densely populated areas is probably a key reason explaining these differences.

Figure 7.6: Package Volumes by MSA Classification

(Pieces per Household per Year, FY2025)



Source: HMS Diary Sample, FY 2025.

The higher package volumes received by households living outside of an MSA is a fairly recent development. As seen in Table 7.2, non-MSA households had the lowest average number of packages received in 2015, just over half of the average volume for households living in large MSAs. By 2020, all MSA classifications had about the same average volume of packages received, in the range of 41 to 47 per year. But by 2025, households living outside MSAs were receiving an average of 50 packages per year, about 50% more than the average for households living in large MSAs. Put differently, between 2015 and 2025, average packages received skyrocketed 154% for non-MSA households but were about the same for households living in large MSAs (-2%).

Table 7.2: Packages Received by MSA Classification

(Pieces per household per Year)

Metro Area Classification	2015	2020	2025	% change 2015-2025	% change 2020-2025
Large MSA	33.4	41.3	32.8	-2%	-21%
Other MSA	27.4	46.9	46.0	67%	-2%
Non-MSA	19.7	43.4	50.0	154%	15%

Source: HMS Diary Sample.

Reasons for using the Postal Service to Send Packages

The HMS recruitment survey asks which delivery company the household used for the most recent package they sent. Of those answering, 71% say they used the Postal Service. These households were subsequently asked the main reason why they use the Postal Service to send packages. Results are shown in Table 7.3.

Nearly half of the households who sent their last package using USPS said that “convenient location” was the main reason for doing so. About a third said it was because USPS service had a better price than its competitors. Other key reasons, which 13% selected, were aspects of USPS service – reliability, online tracking, greater efficiency, and faster delivery.

Table 7.3: Main Reason for Using the USPS to Send Most Recent Package, FY2025

Reason	Percent of Households
Convenient location	49%
Price	34%
Quality of service	13%
No other option available	3%
Don't know/rather not say	2%

Source: HMS Recruitment Sample, FY 2025Q2-Q4. Note: Values may not sum to totals due to rounding.

Satisfaction with Postal Service Package Delivery Service

For each package they reported receiving in their weeklong diary, respondents were also asked how satisfied they were with the delivery on a scale of 1 to 10, with 10 being most satisfied. As shown in Table 7.4, 72% of respondents gave the USPS a rating of 10 and another 20% rated the service as an 8 or a 9. The average score across all respondents was 9.2, indicating generally high satisfaction with the Postal Service's package delivery. The ratings of the different USPS package products are similar, with average scores mostly above 9 and around 90% giving a score of 8 or higher.

Table 7.4: Satisfaction with USPS Package Delivery Service, Packages Received
(Scale of 1 to 10, With 10 Being Most Satisfied and 1 Being Least Satisfied, FY2025)

Service	Share Giving Rating			Average Rating
	10	9	8	
All USPS Packages	72%	11%	9%	9.2
Priority Mail Express	70%	13%	17%	9.4
Priority Mail	63%	13%	11%	8.9
Ground Advantage	71%	12%	9%	9.2
Parcel Select	77%	8%	7%	9.4
Other USPS Packages	63%	14%	11%	9.0

Source: HMS Diary Sample, FY 2025Q2-Q4.

In the recruitment portion of the HMS, households were asked to rate their satisfaction with the USPS for the most recent package their household sent. The results, shown in Table 7.5, again show generally high satisfaction with the USPS, though not quite as high as for packages received. Overall, 57% of respondents gave the USPS a rating of 10 for their last package sent, and 88% gave a rating of 8 or higher. The average rating of 8.9 also indicates high overall satisfaction with the USPS. Ratings were similar for the different USPS products households used to send packages.

Table 7.5: Satisfaction with USPS Package Delivery Service, Packages Sent

(Scale of 1 to 10, With 10 Being Most Satisfied and 1 Being Least Satisfied, FY2025)

Service	Share Giving Rating			Average Rating
	10	9	8	
All USPS Packages	57%	14%	17%	8.9
Priority Mail	57%	14%	17%	8.9
Ground Advantage	58%	14%	16%	9.0
Other USPS Packages	54%	13%	15%	8.7

Source: HMS Recruitment Sample, FY 2025Q2-Q4. Note: Priority Mail Express was not included as a distinct category for this question; these would be included with "Other USPS Packages."

Appendix A: Supplementary Data Tables

Table A-1: Correspondence Mail Received by Type

(Pieces per Household per Year)

Contents	2015	2020	2025	% change 2015-2025	% change 2020-2025
Total Correspondence Mail Received	**128.6**	**116.1**	**92.7**	**-28%**	**-20%**
Personal letter or card	24.9	22.5	19.5	-22%	-13%
Notice/announcement/invitation	48.1	39.9	29.6	-39%	-26%
Insurance Related (EOBs, etc.)	18.5	17.6	19.6	6%	11%
Other Correspondence	37.1	36.0	24.0	-35%	-33%
Shares of Total Correspondence					
Personal letter or card	19%	19%	21%		
Notice/announcement/invitation	37%	34%	32%		
Insurance Related (EOBs, etc.)	14%	15%	21%		
Other Correspondence	29%	31%	26%		

Source: HMS Diary Sample.

Table A-2: Correspondence Mail Sent by Type

(Pieces per Household per Year)

Contents	2015	2020	2025	% change 2015-2025	% change 2020-2025
Personal letter or postcard	7.1	5.3	3.7	-48%	-29%
Greeting/holiday/birthday card	17.8	14.2	11.0	-38%	-22%
Invitation/Announcement	2.4	0.7	1.8	-24%	143%
Forms or applications	3.1	1.3	1.8	-42%	42%
Tax Related	1.5	0.9	0.8	-47%	-12%
Other Correspondence	7.8	6.1	2.6	-67%	-57%
Total Correspondence Mail Sent	**39.7**	**28.5**	**21.8**	**-45%**	**-24%**

Source: HMS Diary Sample.

Table A-3: Correspondence Mail Received and Sent by Household Demographics

(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
All Households	142.4	125.1	98.6	-31%	-21%
By Age Group					
Under 45	116.7	87.5	71.5	-39%	-18%
45-64	152.5	134.8	101.9	-33%	-24%
65 and Over	168.1	161.3	130.4	-22%	-19%
By Income Group					
Less than $50,000	110.4	97.0	90.8	-18%	-6%
$50,000-$99,999	150.7	129.3	97.0	-36%	-25%
$100,000-$149,999	183.6	140.6	97.1	-47%	-31%
$150,000 and Over	213.8	171.9	115.7	-46%	-33%
By Highest level of Education					
Less than high school	106.3	108.2	83.9	-21%	-22%
High school graduate	138.1	121.6	99.1	-28%	-18%
Some college or technical school graduate	139.5	116.3	102.7	-26%	-12%
College graduate	158.2	134.5	99.0	-37%	-26%
By Homeownership					
Own	170.1	145.6	111.7	-34%	-23%
Rent	95.3	81.6	72.7	-24%	-11%
By MSA Classification					
Large MSA	150.9	125.2	94.0	-38%	-25%
Other MSA	136.7	123.5	101.7	-26%	-18%
Non-MSA	128.5	130.6	102.5	-20%	-22%

Source: HMS Diary Sample. Note: Received and sent mail, removes double-count of household-to-household mail.

Table A-4: Transaction Mail Received by Type
(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
Total Transactions	**153.7**	**119.8**	**82.3**	**-46%**	**-31%**
Bills	111.5	82.4	57.1	-49%	-31%
Statements	32.7	30.1	20.9	-36%	-31%
Payments	9.5	7.3	4.3	-55%	-42%
Shares of Total Transactions	**100%**	**100%**	**100%**		
Bills	73%	69%	69%		
Statements	21%	25%	25%		
Payments	6%	6%	5%		

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

Table A-5: Transaction Mail Sent by Type
(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
Total Transactions	**36.4**	**21.6**	**11.6**	**-68%**	**-46%**
Payments	34.3	19.3	10.2	-70%	-47%
Donations	2.1	2.4	1.4	-32%	-41%
Shares of Total Transactions	**100%**	**100%**	**100%**		
Payments	94%	89%	88%		
Donations	6%	11%	12%		

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding.

Table A-6: Transaction Mail Received and Sent by Household Demographics

(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
All Households	189.5	141.2	93.7	-51%	-34%
By Age Group					
Under 45	137.8	79.7	51.8	-62%	-35%
45-64	217.5	163.7	104.9	-52%	-36%
65 and Over	227.6	191.5	133.4	-41%	-30%
By Income Group					
Less than $50,000	149.4	114.1	81.6	-45%	-29%
$50,000-$99,999	215.7	153.4	94.1	-56%	-39%
$100,000-$149,999	228.9	146.2	89.8	-61%	-39%
$150,000 and Over	251.7	164.2	109.1	-57%	-34%
By Highest level of Education					
Less than high school	200.8	149.8	87.6	-56%	-42%
High school graduate	193.9	153.5	95.1	-51%	-38%
Some college or technical school graduate	182.2	139.7	99.3	-46%	-29%
College graduate	187.3	132.9	90.4	-52%	-32%
By Homeownership					
Own	233.1	171.1	114.5	-51%	-33%
Rent	115.6	76.8	53.8	-53%	-30%
By MSA Classification					
Large MSA	199.4	137.1	89.4	-55%	-35%
Other MSA	176.3	139.0	98.4	-44%	-29%
Non-MSA	198.3	165.2	101.8	-49%	-38%

Source: HMS Diary Sample. Note: Received and sent mail, removes double-count of household-to-household mail.

Table A-7: Method Used for Receiving Bills and Statements
Share Received by Mail, by Household Demographics

	2015	2020	2025
All Households	77%	62%	55%
By Age Group			
Under 45	66%	50%	51%
45-64	79%	64%	55%
65 and Over	89%	76%	61%
By Income Group			
Less than $50,000	84%	69%	64%
$50,000-$99,999	72%	63%	55%
$100,000-$149,999	68%	54%	50%
$150,000 and Over	68%	52%	46%
By Highest level of Education			
Less than high school	91%	78%	65%
High school graduate	85%	71%	63%
Some college or technical school graduate	75%	63%	59%
College graduate	69%	55%	48%
By Homeownership			
Own	78%	65%	56%
Rent	73%	56%	53%
By MSA Classification			
Large MSA	74%	60%	53%
Other MSA	77%	63%	57%
Non-MSA	84%	71%	60%

Source: HMS Recruitment Sample. Note: Households that did not indicate how many bills or statements they received by a given method excluded from calculation of that method's volume.

Table A-8: Method of Receiving Bills and Statements, by Age
Percentage of Households Receiving by Each Method in the Last Month

	2015	2020	2025
All Households			
Mail	97%	94%	94%
Electronic	51%	68%	83%
Under 45			
Mail	95%	90%	91%
Electronic	68%	83%	86%
45 - 64			
Mail	98%	96%	96%
Electronic	51%	69%	84%
65 and Over			
Mail	98%	97%	96%
Electronic	25%	48%	78%

Source: HMS Recruitment Sample. Note: Households that did not indicate whether they receive bills or statements by a given method are excluded.

Table A-9: Method Used for Paying Bills
Share Paid by Mail, by Household Demographics

	2015	2020	2025
All Households	31%	21%	14%
By Age Group			
Under 45	17%	10%	6%
45-64	32%	21%	13%
65 and Over	52%	34%	22%
By Income Group			
Less than $50,000	37%	25%	15%
$50,000-$99,999	28%	20%	13%
$100,000-$149,999	22%	16%	12%
$150,000 and Over	19%	15%	11%
By Highest level of Education			
Less than high school	46%	30%	17%
High school graduate	40%	25%	15%
Some college or technical school graduate	29%	21%	14%
College graduate	23%	17%	12%
By Homeownership			
Own	33%	23%	16%
Rent	24%	14%	9%
By MSA Classification			
Large MSA	28%	18%	13%
Other MSA	31%	22%	14%
Non-MSA	44%	30%	16%

Source: HMS Recruitment Sample. Note: Households that did not indicate how many bills they paid by a given method excluded from calculation of that method's volume.

Table A-10: Method of Paying Bills, by Age
Percentage of Households Using Each Method in the Last Month

	2015	2020	2025
All Households			
Mail	69%	55%	44%
Electronic[1]	77%	89%	96%
Telephone call or in-person	36%	29%	40%
Under 45			
Mail	54%	36%	23%
Electronic[1]	89%	96%	98%
Telephone call or in-person	40%	29%	37%
45 - 64			
Mail	72%	61%	48%
Electronic[1]	77%	89%	97%
Telephone call or in-person	37%	30%	43%
65 and Over			
Mail	86%	74%	65%
Electronic[1]	60%	78%	95%
Telephone call or in-person	27%	27%	39%

Source: HMS Recruitment Sample. Note: Households that did not indicate whether they pay bills by a given method are excluded from that method's calculation. 1 Electronic includes, online, automatic deduction from bank account and automatic charge to debit or credit card.

Table A-11: First-Class and Marketing Mail Advertising Received by Household Demographics

(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
All Households	643.6	487.7	378.0	-41%	-22%
By Age Group					
Under 45	477.3	311.6	232.7	-51%	-25%
45-64	685.9	510.2	406.1	-41%	-20%
65 and Over	841.0	685.6	529.1	-37%	-23%
By Income Group					
Less than $50,000	465.2	358.7	277.3	-40%	-23%
$50,000-$99,999	706.5	494.7	370.6	-48%	-25%
$100,000-$149,999	856.8	566.3	451.2	-47%	-20%
$150,000 and Over	1075.7	692.3	527.0	-51%	-24%
By Highest level of Education					
Less than high school	488.5	365.9	271.6	-44%	-26%
High school graduate	583.6	464.7	338.6	-42%	-27%
Some college or technical school graduate	634.8	463.5	357.6	-44%	-23%
College graduate	737.1	530.6	432.0	-41%	-19%
By Homeownership					
Own	802.3	586.4	465.1	-42%	-21%
Rent	373.6	280.3	212.9	-43%	-24%
By MSA Classification					
Large MSA	739.4	513.8	401.6	-46%	-22%
Other MSA	572.3	474.0	369.1	-36%	-22%
Non-MSA	514.2	431.0	317.6	-38%	-26%

Source: HMS Diary Sample.

Table A-12: First-Class and Marketing Mail Advertising by Sender Type

(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
First-Class Ads[1]					
Financial	26.8	21.0	15.0	-44%	-28%
Merchants	12.7	8.5	8.1	-36%	-4%
Services	21.6	13.8	10.1	-53%	-27%
Social	6.6	5.7	5.4	-19%	-6%
All other	2.5	2.7	3.7	43%	36%
Total	70.2	51.7	42.3	-40%	-18%
Marketing Mail Ads					
Financial	126.9	100.4	86.7	-32%	-14%
Merchants	171.1	105.8	80.8	-53%	-24%
Services	100.1	74.4	55.3	-45%	-26%
Social	100.1	95.2	78	-22%	-18%
All other	75.2	60.3	34.9	-54%	-42%
Total	573.4	436	335.7	-41%	-23%
Total First Class and Marketing Mail Ads					
Financial	153.7	121.3	101.7	-34%	-16%
Merchants	183.8	114.2	88.9	-52%	-22%
Services	121.6	88.2	65.4	-46%	-26%
Social	106.8	100.9	83.4	-22%	-17%
All other	77.7	63.0	38.6	-50%	-39%
Total	643.6	487.7	378.0	-41%	-22%

Source: HMS Diary Sample. Note: Values may not sum to totals due to rounding. 1 Includes Secondary Advertising.

Table A-13: Share of First-Class and Marketing Mail Advertising by Sender Type

(Percent of Pieces)

	2015	2020	2025
First-Class Ads[1]			
Financial	38%	41%	36%
Merchants	18%	16%	19%
Services	31%	27%	24%
Social	9%	11%	13%
All other	4%	5%	9%
Total	100%	100%	100%
Marketing Mail Ads			
Financial	22%	23%	26%
Merchants	30%	24%	24%
Services	17%	17%	16%
Social	17%	22%	23%
All other	13%	14%	10%
Total	100%	100%	100%
Total First Class and Marketing Mail Advertising			
Financial	24%	25%	27%
Merchants	29%	23%	24%
Services	19%	18%	17%
Social	17%	21%	22%
All other	12%	13%	10%
Total	100%	100%	100%

Source: HMS Diary Sample. Note: Values may not sum to 100 due to rounding. 1 Includes Secondary Advertising.

Table A-14: Reading Rates of First-Class and Marketing Mail Advertising

(Percent of Pieces Read by at Least One Household Member)

	2015	2020	2025
All First Class and Marketing Mail Advertising	47%	46%	51%
By ad type			
FCM Ad only	56%	50%	53%
FCM Ad enclosed	51%	49%	66%
Commercial Marketing Mail	45%	45%	50%
Non-profit Marketing Mail	49%	50%	50%
By sender industry			
Financial	36%	37%	45%
Merchant	57%	57%	57%
Service	43%	40%	52%
Social	49%	49%	48%
By past relationship (Marketing Mail Advertising only)			
Existing customer	59%	62%	64%
Prospect	25%	26%	36%

Source: HMS Diary Sample. Notes: Mail pieces for which reading treatment was not provided are excluded. Past relationship was not collected for First Class Mail prior to 2021.

Table A-15: Likelihood of Response to First-Class and Marketing Mail Advertising

(Percent of Pieces, FY2025)

Scale of 1 to 10 with 10 being most likely to respond	Very Likely 8-10	Somewhat likely 5-7	Unlikely 1-4
All First Class and Marketing Mail Advertising	14%	15%	71%
FCM Ad only	13%	12%	75%
FCM Ad enclosed	19%	16%	65%
Commercial Marketing Mail	12%	14%	75%
Non-profit Marketing Mail	19%	21%	60%
Financial	6%	8%	86%
Merchant	20%	20%	60%
Service	8%	11%	80%
Social	18%	21%	62%
FC Ad with coupon	22%	18%	59%
FC Ad without coupon	14%	15%	71%
Marketing Mail Only			
Existing Customer	**25%**	**24%**	**51%**
Existing Customer with coupon	37%	29%	34%
Existing Customer without coupon	18%	19%	63%
Prospective Customers	**3%**	**8%**	**89%**
Prospects with coupon	5%	12%	83%
Prospects without coupon	2%	5%	93%

Source: HMS Diary Sample FY 2025Q2-Q4. Note: Mail pieces for which response likelihood was not provided are excluded.

Table A-16: Reading of and Response to First-Class and Marketing Mail Advertising by Demographics

(Percent of Pieces, FY2025)

	Reading Rate	Likely to Respond 8-10
All Households	51%	14%
By Age Group		
Under 45	48%	12%
45-64	50%	13%
65 and Over	54%	16%
By Income Group		
Less than $50,000	58%	16%
$50,000-$99,999	54%	14%
$100,000-$149,999	46%	12%
$150,000 and Over	42%	12%
By Highest level of Education		
Less than high school	54%	24%
High school graduate	59%	15%
Some college or technical school graduate	52%	14%
College graduate	46%	12%
By Homeownership		
Own	50%	14%
Rent	53%	14%
By MSA Classification		
Large MSA	50%	13%
Other MSA	51%	13%
Non-MSA	53%	15%

Source: HMS Diary Sample. Note: Mail pieces for which reading treatment or response likelihood was not provided are excluded from respective calculations.

Table A-17: Periodical Mail Received by Household Demographics

(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
All Households	40.0	29.6	21.9	-45%	-26%
By Age Group					
Under 45	26.4	12.3	12.7	-52%	4%
45-64	41.1	29.2	18.5	-55%	-37%
65 and Over	60.1	52.5	37.8	-37%	-28%
By Income Group					
Less than $50,000	25.0	21.4	20.0	-20%	-7%
$50,000-$99,999	47.0	33.1	21.0	-55%	-37%
$100,000-$149,999	58.5	30.5	22.8	-61%	-25%
$150,000 and Over	69.3	38.4	24.8	-64%	-35%
By Highest level of Education					
Less than high school	29.0	15.1	20.4	-30%	35%
High school graduate	35.3	30.8	20.0	-43%	-35%
Some college or technical school graduate	35.3	26.1	21.6	-39%	-17%
College graduate	49.9	32.6	23.1	-54%	-29%
By Homeownership					
Own	52.6	36.7	26.5	-50%	-28%
Rent	18.8	14.9	13.2	-30%	-12%
By MSA Classification					
Large MSA	40.3	28.7	18.7	-54%	-35%
Other MSA	37.1	27.0	22.4	-40%	-17%
Non-MSA	49.9	43.0	31.3	-37%	-27%

Source: HMS Diary Sample.

Table A-18: Packages Received by Household Demographics

(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
All Households	29.3	43.9	39.8	36%	-10%
By Age Group					
Under 45	30.7	48.3	34.9	14%	-28%
45-64	28.4	44.0	43.5	53%	-1%
65 and Over	27.9	38.3	41.6	49%	8%
By Income Group					
Less than $50,000	19.7	31.2	29.8	51%	-4%
$50,000-$99,999	33.6	44.8	37.0	10%	-17%
$100,000-$149,999	46.5	57.5	48.1	4%	-16%
$150,000 and Over	47.1	55.4	55.8	19%	1%
By Highest level of Education					
Less than high school	24.4	43.4	29.3	20%	-33%
High school graduate	21.9	37.1	38.8	77%	4%
Some college or technical school graduate	29.2	42.7	41.0	41%	-4%
College graduate	36.5	49.0	41.4	14%	-16%
By Homeownership					
Own	33.9	47.0	45.3	34%	-4%
Rent	21.6	36.9	29.3	36%	-21%
By MSA Classification					
Large MSA	33.4	41.3	32.8	-2%	-21%
Other MSA	27.4	46.9	46.0	67%	-2%
Non-MSA	19.7	43.4	50.0	154%	15%

Source: HMS Diary Sample.

Table A-19: Packages Sent by Household Demographics

(Pieces per Household per Year)

	2015	2020	2025	% change 2015-2025	% change 2020-2025
All Households	4.6	5.2	4.8	3%	-8%
By Age Group					
Under 45	6.9	5.2	5.3	-24%	2%
45-64	3.3	6.2	5.4	65%	-13%
65 and Over	3.1	4.0	3.4	11%	-14%
By Income Group					
Less than $50,000	3.8	4.1	3.0	-21%	-26%
$50,000-$99,999	5.8	5.3	4.5	-22%	-15%
$100,000-$149,999	4.5	6.1	5.5	21%	-11%
$150,000 and Over	4.0	6.0	8.1	101%	36%
By Highest level of Education					
Less than high school	3.2	6.2	7.9	149%	26%
High school graduate	2.6	4.7	3.7	39%	-22%
Some college or technical school graduate	5.1	5.0	5.1	-2%	1%
College graduate	6.3	5.6	5.0	-20%	-10%
By Homeownership					
Own	4.6	5.3	5.5	20%	5%
Rent	4.8	5.0	3.3	-31%	-34%
By MSA Classification					
Large MSA	4.1	5.7	4.3	5%	-25%
Other MSA	4.4	4.4	4.9	12%	11%
Non-MSA	8.0	5.9	5.9	-26%	0%

Source: HMS Diary Sample.

Table A-20: Satisfaction with Package Received by USPS by Household Demographics

(Scale of 1 to 10, With 10 Being Most Satisfied and 1 Being Least Satisfied, FY2025)

	Percent Rating 10 Highest Satisfaction	Percent Rating 8 or 9	Average Rating
All Households	72%	20%	9.2
By Age Group			
Under 45	71%	18%	9.2
45-64	72%	21%	9.4
65 and Over	72%	19%	9.2
By Income Group			
Less than $50,000	70%	22%	9.2
$50,000-$99,999	72%	20%	9.3
$100,000-$149,999	75%	18%	9.4
$150,000 and Over	72%	18%	9.2
By Highest level of Education			
Less than high school	88%	6%	9.6
High school graduate	69%	24%	9.3
Some college or technical school graduate	72%	18%	9.2
College graduate	73%	18%	9.3
By Homeownership			
Own	72%	19%	9.2
Rent	72%	21%	9.3
By MSA Classification			
Large MSA	70%	21%	9.2
Other MSA	73%	18%	9.3
Non-MSA	74%	19%	9.4

Source: HMS Diary Sample. Note: Packages for which a satisfaction rating was not provided are excluded.

Table A-21: Satisfaction with Last Package Sent by USPS by Household Demographics

(Scale of 1 to 10, With 10 Being Most Satisfied and 1 Being Least Satisfied, FY2025)

	Percent Rating 10 Highest Satisfaction	Percent Rating 8 or 9	Average Rating
All Households	57%	30%	8.9
By Age Group			
Under 45	54%	32%	8.9
45-64	57%	30%	8.9
65 and Over	62%	27%	9.1
By Income Group			
Less than $50,000	62%	26%	9.0
$50,000-$99,999	58%	30%	9.0
$100,000-$149,999	56%	31%	8.9
$150,000 and Over	49%	36%	8.8
By Highest level of Education			
Less than high school	61%	26%	9.1
High school graduate	63%	26%	9.1
Some college or technical school graduate	59%	29%	9.0
College graduate	53%	33%	8.9
By Homeownership			
Own	58%	30%	9.0
Rent	56%	31%	8.9
By MSA Classification			
Large MSA	55%	31%	8.9
Other MSA	58%	30%	9.0
Non-MSA	62%	28%	9.1

Source: HMS Recruitment Sample. Note: Households that did not use USPS to send their last package or that did not provide satisfaction rating are excluded

Appendix B: Methodology

Timing of Recent Changes to the Survey

Substantial changes were made to the Household Mail Survey (including its name change from Household Diary Study) as of January 2025, meaning that the old survey was still in effect during the first quarter of Fiscal Year 2025, from October to December 2024, while the new survey was in effect for the remaining three quarters, from January to September 2025. The results presented in the 2025 Annual Report for FY2025 are thus based on data both from the old survey and the new, while results for 2015 and 2020 are based on data from the old survey. This appendix describes the methodology used to collect, process, weight, and present the data from the new survey, constituting the majority of the data behind the 2025 estimates. For discussion of the methodology behind the data for the first quarter of FY2025, as well as all prior years, please refer to the methodology section of the 2024 HDS Annual Report.

Population and Sampling

A sampling frame was constructed that includes all residential addresses in the 50 states and Washington, DC. Post office (P.O.) boxes were excluded from the frame, except in cases where they were the sole means of receiving mail, in which case they were retained. Addresses with drop point deliveries with more than 5 units attributed to the address were removed.

The sampling frame was enhanced by joining data on rural-urban-continuum codes at the county level and estimates of proportion of persons renting and below the poverty level from the 2023 Census planning database. These additional data sources along with the geography of the addresses were used to construct sampling strata.

Sampling strata were constructed to allow for the targeting of areas with a high concentration of lower-income and renter households, as these households tend to respond to surveys at a lower rate. In addition, sampling strata were constructed using the four Census regions below (Table B.1).

Table B.1: Census Regions

Region	States/Districts
Northeast	Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.
Midwest	Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.
South	Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.
West	Arizona, Alaska, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming.

Table B.2 defines the sampling strata based on combinations of Census region, rural-urban continuum codes, and estimates of the percentage of persons in the tract who are renters and the percentage of persons in the tract who are below the poverty line. The strata definitions in Table B.2 collapse some possible

combinations of the factors that define strata to ensure that each stratum's target population was above a minimum size.

Table B.2: Sampling Stratum Definitions and Approximate Number of Frame Addresses

Sampling Stratum	Strata Description	Addresses
1	Midwest, Large Metro, low % renter and poverty tracts	9,850,540
2	Midwest, Large Metro, high % renter and/or poverty tracts	4,701,190
3	Midwest, Small/Medium Metro, low % renter and poverty tracts	6,484,472
4	Midwest, Small/Medium Metro, high % renter and/or poverty tracts	2,612,284
5	Midwest, Non-Metro	6,327,857
6	Northeast, Large Metro, low % renter and poverty tracts	8,847,823
7	Northeast, Small/Medium/Large Metro, high % renter and/or poverty tracts	8,223,816
8	Northeast, Small/Medium Metro, low % renter and poverty tracts	4,545,252
9	Northeast, Non-Metro	2,192,008
10	South, Large Metro, low % renter and poverty tracts	18,093,591
11	South, Large Metro, high % renter and/or poverty tracts	10,277,663
12	South, Small/Medium Metro, low % renter and poverty tracts	12,492,027
13	South, Small/Medium Metro, high % renter and/or poverty tracts	6,310,072
14	South, Non-Metro, low % renter and poverty tracts	5,267,247
15	South, Non-Metro, high % renter and/or poverty tracts	3,426,901
16	West, Large Metro, low % renter and poverty tracts	11,567,817
17	West, Large Metro, high % renter and/or poverty tracts	8,073,905
18	West, Small/Medium Metro, low % renter and poverty tracts	5,583,498
19	West, Small/Medium Metro, high % renter and/or poverty tracts	2,437,984
20	West, Non-Metro	2,460,619

There was a large degree of uncertainty in the expected completion rate for the data collection process. A strategy was employed that allowed flexibility to increase or decrease the released sample over the course of the quarter depending on the observed completion rates. A maximum total sample size based on an estimated lower limit of the expected response rate was computed based on previous iterations of the survey.

Survey invitations in the form of postcards were sent out across the quarter in batches every two weeks. The sample size sent out for a given batch was pre-determined for the first several batches but flexible for the later batches and dependent on the observed completion rate from earlier in the quarter. To accomplish this, within each of the 20 sampling strata, the total maximum sample is divided into approximately equal groups called replicate groups when the initial sample is drawn before the start of the quarter.

Data Collection

Participants accessed the survey using information on their invitation postcards. To be eligible to participate, respondents must be at least 18 years old, live at the sampled address, and have knowledge of the household's sent and received mail. Informed consent was collected online prior to the start of the survey. Participants completed the survey via a dedicated website, or over the web or over the phone with the assistance of a telephone interviewer.

Upon completing the recruitment section of the survey, consisting of questions about their household, respondents were instructed to proceed to the diary portion of the survey to record all the mail they sent and received over a one-week period. Respondents selected their preferred diary week by choosing a Monday from the calendar displayed within the survey. Respondents were allowed to complete the diary by the end of the quarter corresponding to their batch release. Assistance for participants was provided via an email address and a toll-free help line. After completing the survey, respondents could choose an electronic gift card or a paper check for compensation.

Submitted surveys were assessed for completeness and fitness for analysis. The recruitment sample consists of the set of households that adequately completed the recruitment section of the survey. Households that reached the end of the recruitment section and answered at least half of all questions asked in that section (with an answer other than "don't know" or "rather not say") were included in the recruitment sample.

The diary sample consists of the set of households that adequately completed a mail diary. Households were only included in the diary sample if, on average, the respondent answered more than half the questions asked about each mail piece reported. Additionally, a household was not included in the diary sample if it was excluded from the recruitment sample. If a diary was submitted less than six days after the recruitment survey was started, that diary was excluded from the diary sample.

Imputation of Missing Values

Demographic variables used in weighting—namely age of householder, education level of householder, and homeownership—require imputation of missing values. Imputation of missing demographic variables was conducted using a chained random forests method. Random forest imputation is a machine learning technique which can accommodate nonlinearities and interactions and does not require a particular regression model to be specified.[5]

Weighting

After the data were cleaned and unknown values of key demographic variables imputed, household weights were generated for each quarter. These weights were designed to adjust for unequal probabilities of being sampled across sampling strata and to align the weighted sample to population in terms of key variables like age, education, and homeownership. The following sections describe the weighting process.

Base Weights

First, a base weight $WBASE_S$ for each household was calculated by dividing the number of addresses in that household's stratum N_S by the number of addresses in that stratum to which an invitation was sent I_S.

$$WBASE_s = {}^{N_s}/_{I_s}$$

The base weight was the same for all households within a stratum and represented the inverse probability that an address in a given stratum would be mailed an invitation. If more invitations than average were sent

[5] A. D. Shah, J. W. Bartlett, J. Carpenter, O. Nicholas, and H. Hemingway, "Comparison of Random Forest and Parametric Imputation Models for Imputing Missing Data Using MICE: A CALIBER Study," *American Journal of Epidemiology* 179, no. 6 (2014): 764–774.

to that stratum per address in the stratum, the weight would be smaller to offset the higher probability of selection for the households in that stratum. If fewer were sent, this weight would be larger.

Nonresponse Adjustment

Next, a nonresponse adjustment was applied to the base weight. The nonresponse adjustment was equal to the number of invitations not returned as undeliverable in that stratum D_S divided by either the number of recruitment surveys completed in the stratum CR_S, if calculating recruitment weights, or the number of diaries completed CD_S, if calculating diary weights. A nonresponse adjusted weight $WRNR_S$ for a household in the recruitment sample, or $WDNR_S$ for a household in the diary sample, was produced by multiplying the base weight by the adjustment:

$$WRNR_S = WBASE_S \left({}^{D_s}/_{CR_s} \right)$$

$$WDNR_S = WBASE_S \left({}^{D_s}/_{CD_s} \right)$$

Normalization

Nonresponse-adjusted weights at this point were sized such that they sum to the estimated total number of deliverable addresses in the sampling frame, so that each survey or diary in the sample represents a large number of addresses in the frame. While it is common to use weights in this configuration, at this point the weights in this study were normalized. That is, each weight was divided by the average weight in the sample, so that the weights averaged to 1 and summed to the number of households in the sample, rather than addresses in the frame. This has no impact on results but allows one to easily see whether a household has an above- or below-average weight.

Raking to Match Census Demographics

The normalized nonresponse-adjusted weights were then used as inputs to an iterative proportional fitting, or raking, algorithm, which adjusted the weights to make the weighted sample representative of the population in terms of key demographics.

The demographic variables of concern include (1) age of the reference householder, (2) educational attainment of the reference householder, (3) homeownership, and (4) a geographic variable consisting of region of the country as well as presence in a large MSA, other MSA, or non-MSA. Notably, the geographic variable here is similar to, but less fine grained than, the sampling strata, with only 12 bins vs. 20 strata.

The raking algorithm was used to bring the share of weighted households to targeted level in each of seven age categories, seven education categories, two homeownership categories, and 12 geographic categories.

Targeted shares of households for age, education, and geography were obtained from the U.S. Census Bureau's Current Population Survey, 2025 Annual Social and Economic Supplement. The same targets were used for all quarters of 2025. Targeted shares for homeownership were obtained for each quarter via FRED from the U.S. Census Bureau's Housing Vacancies and Homeownership data. The series used was not seasonally adjusted. Raking of the weights was carried out using the ipfweight module in Stata.[6]

[6] Michael Bergmann, "IPFWEIGHT" Stata module to create adjustment weights for surveys", ResearchGate, January 2011.

Trimming

To limit the potential impact of very high weights, weights were trimmed after raking, with any weight above 5 reduced to 5, and any weight below 0.2 increased to 0.2. The net trimmings—the sum of all value removed from the weights—were distributed equally to the weights on the households whose weights were not trimmed so that the weights still averaged to 1 after trimming. If the distribution of trimmings pushed any new weights over 5, the process was repeated.

Data Presentation

This section describes approaches used in calculating the results presented in the report, after data processing and weighting.

General Practices Related to Seasonality

Due to seasonality, and also to avoid bias due to variation in sample size, average pieces per household per week, as reported in diary responses, as well as the per-month recruitment-based volumes, were calculated separately for each quarter, then converted to annual values by multiplying by 52 (or by 12 for monthly volumes). Annual pieces per household per year were then calculated as a straight average of the four quarterly values.

Shares of volumes, such as the mail share of bill payments or mail share of bills and statements received, were calculated as the shares of the annual volumes calculated as described above.

Shares of households, such as the share of households citing a certain reason for paying bills by mail, are calculated on a quarterly basis, with the annual share being a straight average of four quarterly shares, or in cases where the analysis is based on a question introduced in January 2025, based on an average of the three quarterly shares available. The one exception is for tables reporting level of satisfaction with package services, where shares of households reporting a given level of satisfaction, or the average level of satisfaction, are calculated as one single share or average across the three quarters.

Practices Related to Item Nonresponse

Item nonresponse—when a respondent declines to answer a given question in the survey—affects most estimates produced in the HMS, with treatment varying depending on the type of question and type of analysis.

Some respondents did not answer questions about key demographic characteristics, such as the householder's age or household income. Tables and figures breaking down mail volumes per household by these demographic characteristics do not include these non-responders—as which group they belong to is unknown—but do include them in the calculation of volumes per household among all households, if that figure is presented.[7]

Some households did not answer questions such as the number of bills they paid by various methods or reasons they pay bills by mail. Estimates presented based on these types of questions exclude the non-responders. For example, the share of households that pay any bills by mail is calculated as the number of weighted households that reported paying at least one bill by mail in the last month divided by the number

[7] Note that the imputed missing demographic characteristics used for assigning household weights are *not* used for the reported breakdowns of mail volumes by demographic characteristics.

of households that indicated whether or not they pay any bills by mail, with households that did not respond excluded. Tables in the report that exclude non-responders in this fashion include all tables reporting on methods of receiving bills and statements or methods of paying bills, all tables reporting on reasons for various mailing behaviors, all tables reporting on level of satisfaction with package services and all tables reporting on share of advertising pieces read or likelihood of response to advertising mail.

Some households did not answer questions about characteristics of individual mail pieces, such as contents or industry of sender. Pieces of mail for which these questions are not answered are included in estimates of total volume, and are generally classified as Other, when, due to nonresponse to a question, they cannot be classified into the categories presented in a table.

Change in Definition Affecting Tables of Volumes by Urbanicity

Tables reporting volumes by urbanicity—household presence in a large MSA, other MSA or non-MSA—were affected by a change in the definition used for a large MSA. Up until January 2025, "Large MSA" included only the 30 largest metropolitan areas in the United States, as defined by the 2020 US Census. Beginning in January 2025, the definition was expanded to include any county located in a metropolitan area with a population of 1 million or more. This broader definition results in approximately 11% of US households shifting from being categorized as "Other MSA" to "Large MSA." Data presented for 2025 represents a hybrid of these two definitions, with households surveyed from October to December being classified according to the old definition and households surveyed from January to September being classified according to the new definition. Data presented for years prior to 2025 use the old definition.

Eliminating the Double-Count for First-Class Mail and Packages

First-Class Mail (FCM), including correspondence and transaction mail, and packages are notable because these categories of mail can be sent from household to household. When total household FCM or packages sent and received are tabulated, one must eliminate the double-count of household-to-household mail.

The double-count occurs because households report FCM and packages they send to other households with their sent mail and also report FCM and packages they receive from other households with their received mail. The pieces sent to other households and received from other households represent separate estimates of the same flow of mail—that from households to other households. Therefore, if one calculates FCM sent and received by simply adding up FCM sent and FCM received, one counts the household-to-household mail twice.

The standard practice in tabulating total household FCM or total household packages is to only include mail or packages reported received from other households, leaving out the mail or packages sent to other households.