



®

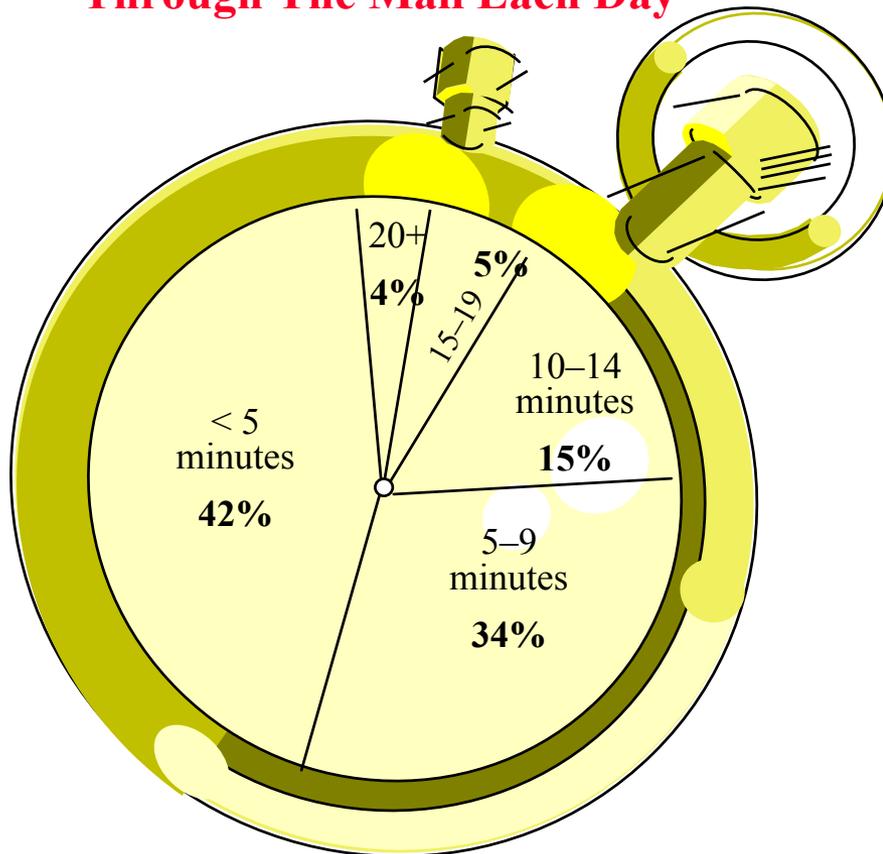
**Marketing
Research**

Consumer Attitudes Toward and Usage of Advertising Mail

Opening the Mail

On average, consumers spend 7 minutes each day with their mail.

Minutes Spent Sorting Through The Mail Each Day

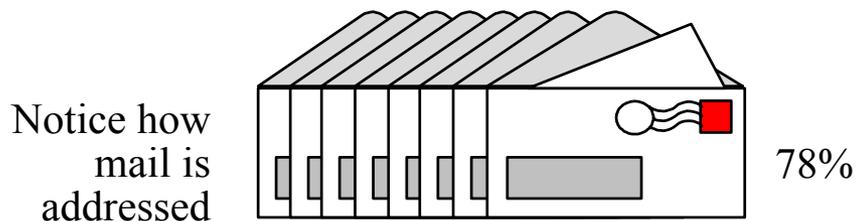
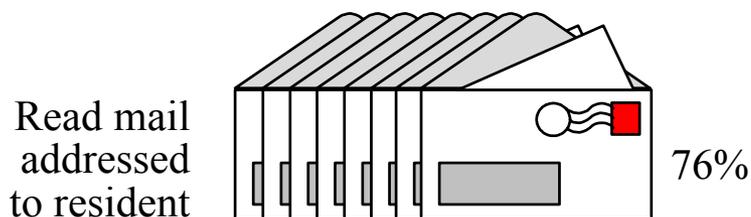


1 in 4 consumers spend more than 10 minutes each day with their mail

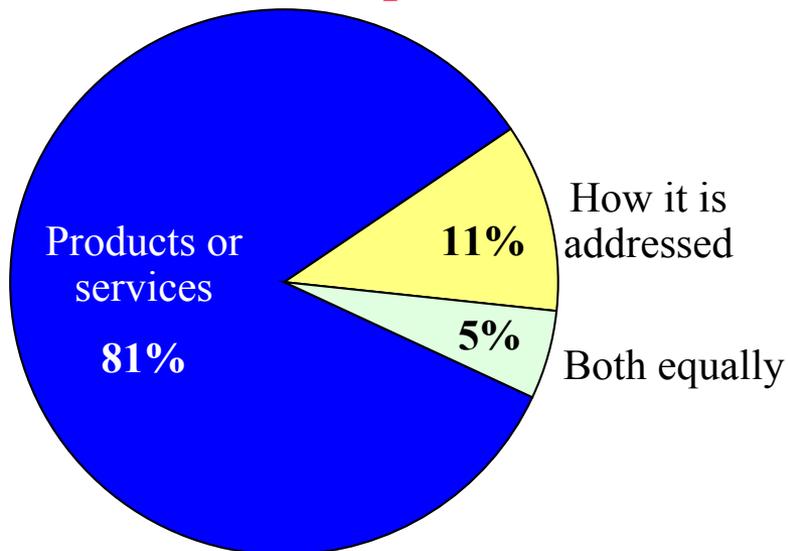
Opening the Mail

Most consumers notice how advertising mail is addressed, but it does not affect readership. Relevant products/services are the key drivers of mail readership, not the form of address

% of Consumers Who...¹



What Is Most Important?²



Consumers know that their names are sold on mailing lists, and that personally addressed mail is not necessarily “personal”

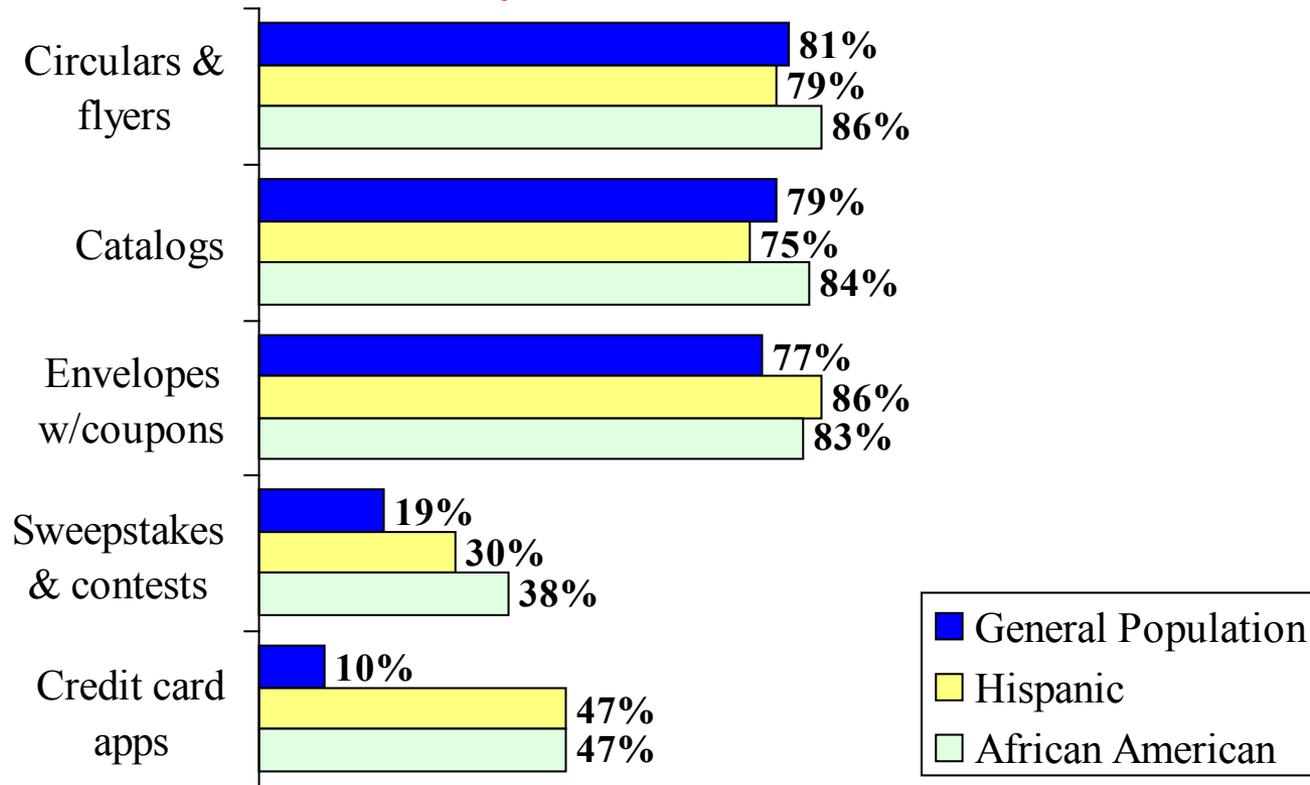
¹Source: NFO WorldGroup, 4,016 respondents, February 2001.

²Source: Woelfel Research, Inc., 504 respondents, January 1997.

Opening the Mail

Not all advertising mail is “junk” mail. Smart shopping information is useful to at least 75% of consumers.

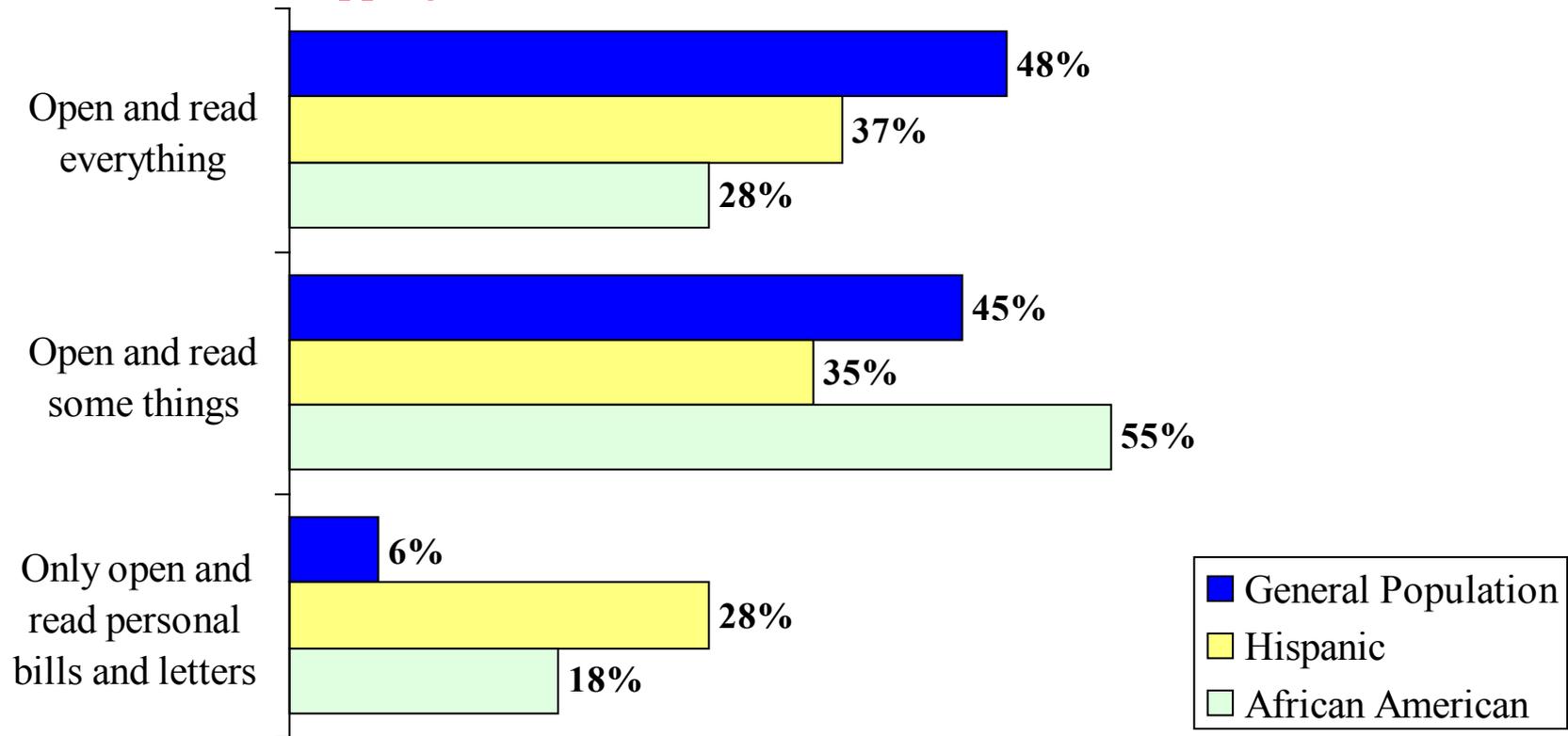
Usefulness of Direct Mail Advertising Vehicles % Extremely/Somewhat Useful



Opening the Mail

The majority of consumers open and read at least some of their advertising mail.

Frequency of Using Coupons or Special Offers When Shopping for Routine Household Purchases or Services



General Population Source: NFO WorldGroup, 4,016 respondents, February 2001.

Hispanic Source: TNS Hispanic Omnibus 651 Hispanic females, September 1999.

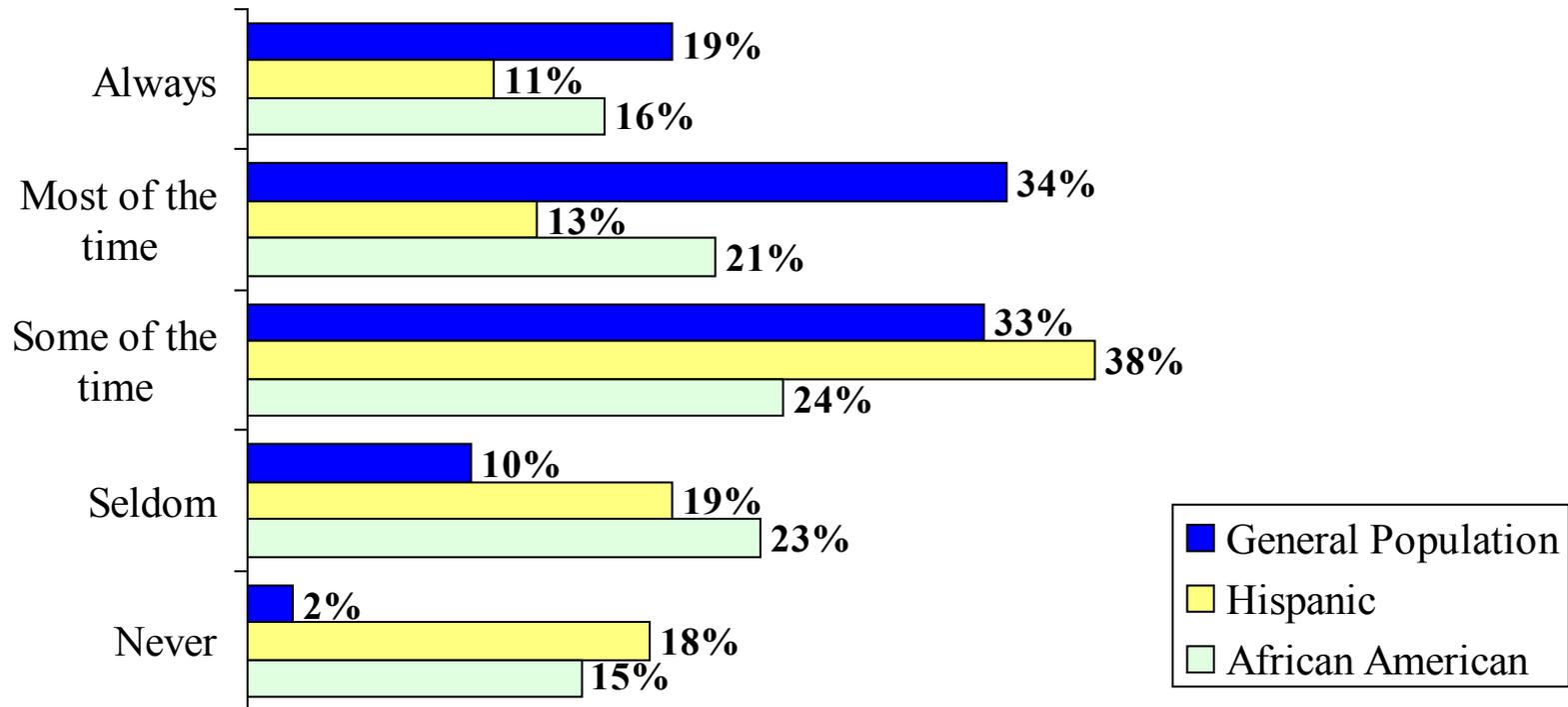
African American Source: Woelfel Research, Inc., 501 respondents, January 2000.

Coupon Usage

Eight in ten consumers use coupons at least some of the time; five in ten do so most or all of the time.

Among African Americans and Hispanics, six in ten use coupons at least some of the time

Frequency of Using Coupons or Special Offers When Shopping for Routine Household Purchases or Services

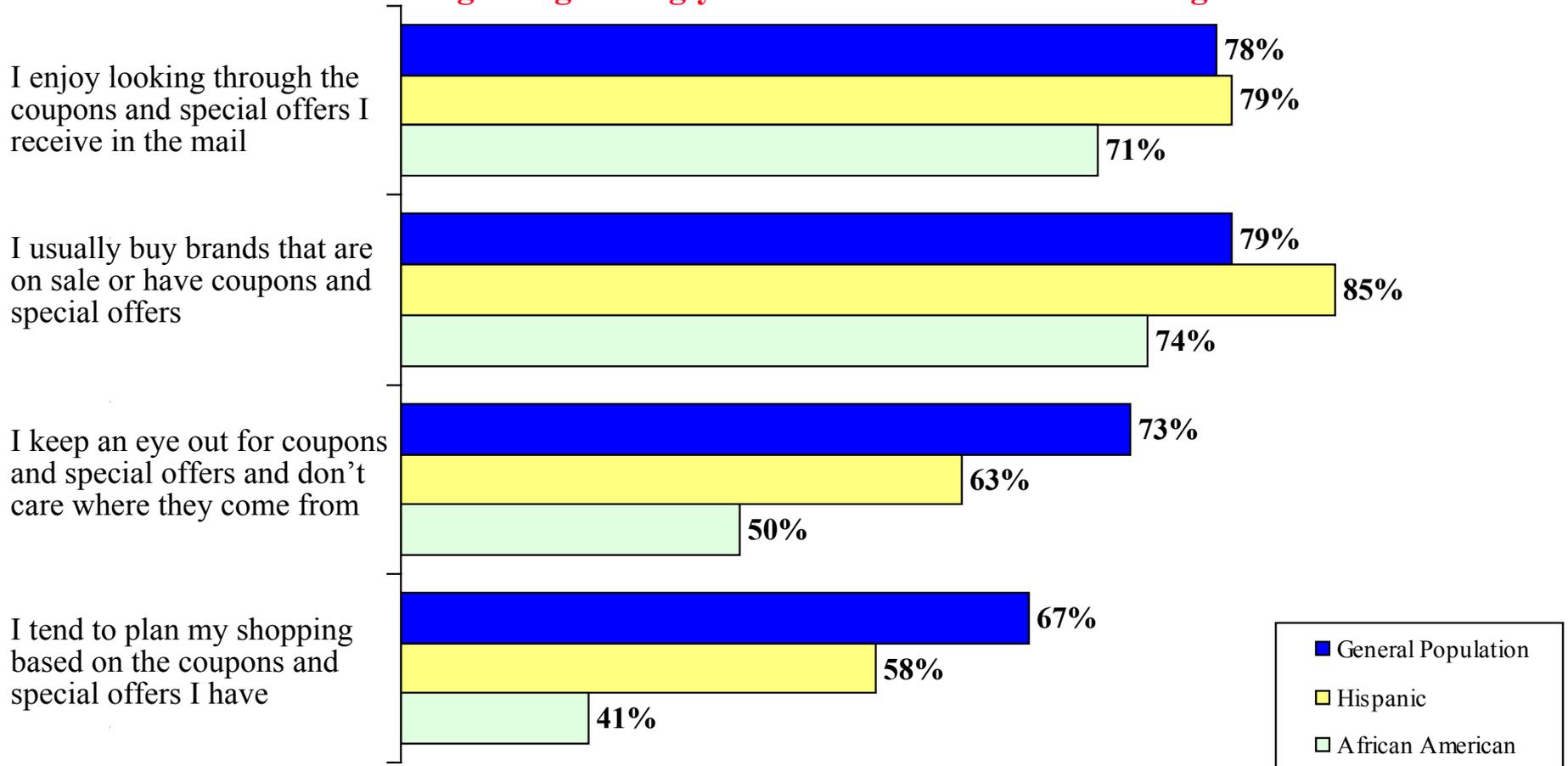


General Population Source: NFO WorldGroup, 4,016 respondents, February 2001.
Hispanic Source: TNS Hispanic Omnibus 651 Hispanic females, September 1999.
African American Source: Woelfel Research, Inc., 501 respondents, January 2000.

Attitude is Everything!

ADVO's Consumer Segments are based on attitudes towards use of coupons and special offers. The majority of consumers have learned to take advantage of promotional advertising to save money.

% of Households Agreeing Strongly/Somewhat With The Following Statements



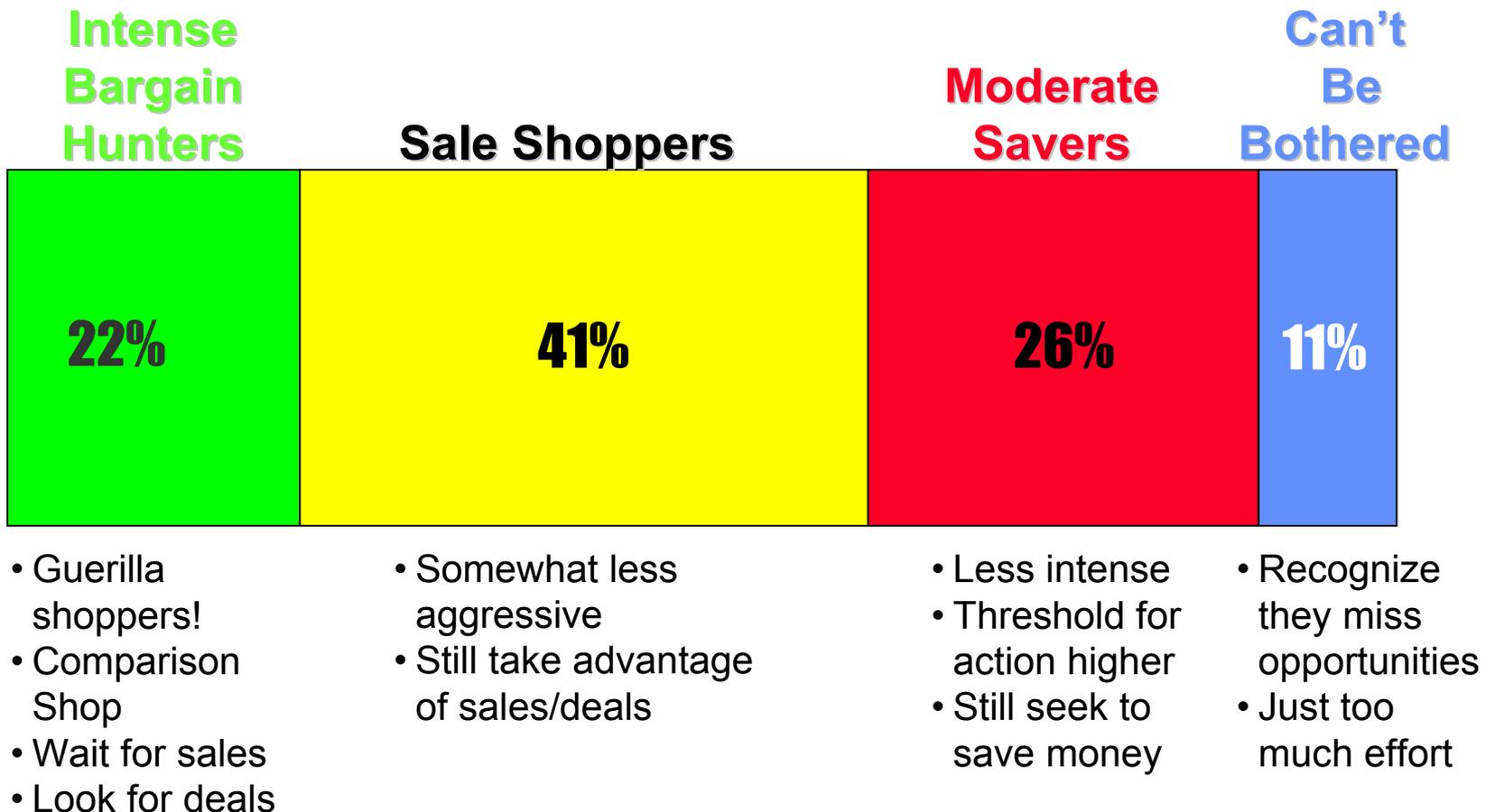
General Population Source: NFO WorldGroup, 48,968 respondents, January - December 2000.

Hispanic Source: TNS Hispanic Omnibus 651 Hispanic females, September 1999.

African American Source: Woelfel Research, Inc., 501 respondents, January 2000.

ADVO's Smart Shopper Segments

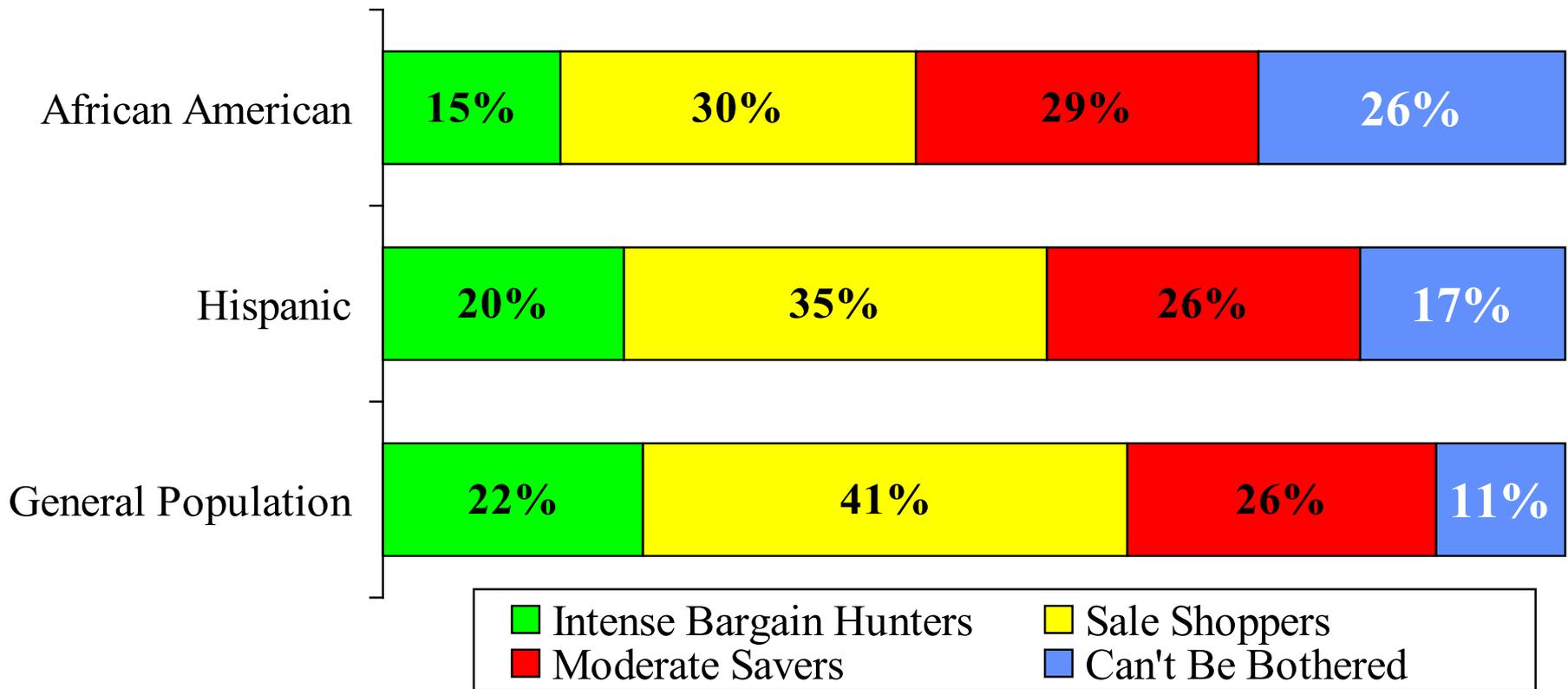
ADVO's consumer segments are similar demographically and across PRIZM groups. *Attitude is everything!*



ADVO Smart Shopper Segments

Three out of five consumers are Intense Bargain Hunters or Sale Shoppers

45% of African American and 55% of Hispanic consumers are Intense Bargain Hunters or Sale Shoppers.



General Population Source: NFO WorldGroup, 48,968 respondents, January - December 2000.

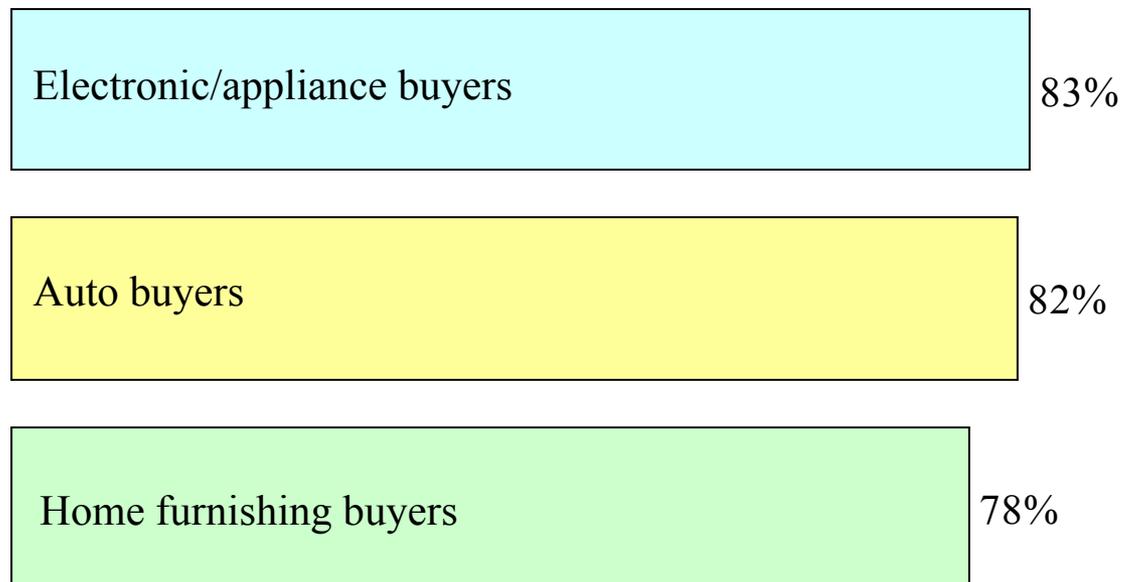
Hispanic Source: TNS Hispanic Omnibus 651 Hispanic females, September 1999.

African American Source: Woelfel Research, Inc., 501 respondents, January 2000.

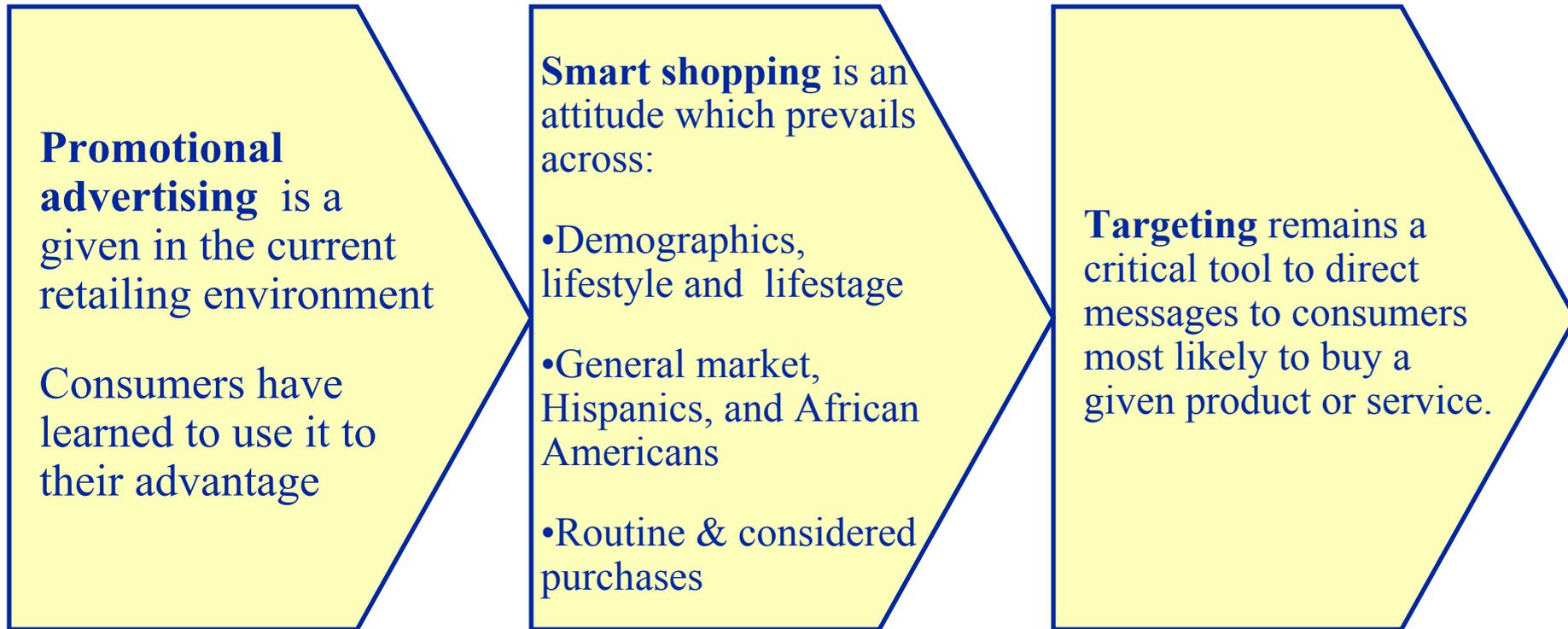
Consumers use their smart shopping skills for considered purchases as well as for routine shopping

A research study conducted by ADVVO in January '97 among past 6 month auto, furniture and electronics/appliances buyers confirmed that smart shopping is not limited to routine purchases. Consumers apply the same smart shopping techniques to more expensive purchases.

% That do some form of research or comparison shopping during the shopping process



So what does this mean for advertisers?



Promotional print advertising is effective, regardless of the target audience!