EMA Foundation's
Institute of Postal Studies Presents:

# 2012 EMA Mailing Industry Job Study

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# Executive Summary

The U.S. mailing industry supports:

**8.4 million mailing industry jobs (6% of U.S. Jobs).**

# Executive Summary

The U.S. mailing industry supports:

**$1.3Trillion in sales revenue,**
**and**
**over 8.6% of U.S. GDP.**

# Executive Summary

- **The U.S. mailing industry is significant in size to other key industries:**

| | # of Jobs | Revenue |
|---|---|---|
| Mailing Industry | 8.4 million | $1.3 Trillion |
| Airline Industry | 10 million | $1.0 Trillion |
| Oil and Natural Gas Industry | 9.6 million | $1.1 Trillion |

Sources:
" ***Economic Impacts of the Oil and Natural Gas Industry on the US Economy in 2011" by PricewaterhouseCoopers LLP***
***"CEO Greetings America Needs a National Airline Policy" by Gary Kelly***

# Executive Summary

Policies that have a dramatic influence on the mailing industry impact many workers:

**Over 76% of mailing industry jobs depend upon the delivery infrastructure of the USPS.**

# Executive Summary

**A viable postal service results in a healthier economy!**

# 2012 Mailing Industry Job Study

- **Mailing Industry is the backbone of the American economy and what happens in the Mailing Industry echoes throughout the entire economy.**

- **Mailing Industry provided $1.3 trillion in sales revenue and 8.6% of GDP.**
  - **The Mailing industry grew by over $100MM from 2009 to 2011 despite losing 400,000 jobs during that same time period.**

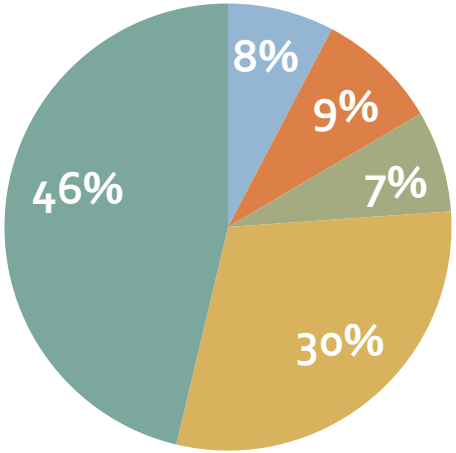
# 2012 Mailing Industry Job Study

- **Mailing Industry supports 8.4 million American jobs which is 6% of U.S. Jobs.**
  - **The results show that the Mailing Industry touches every private and public sector of the economy with jobs in every congressional district.**
  - **There are 10 times more mailing industry jobs in the private sector than Postal Service employees.**

# Mailing Industry Job Summary Distribution

- Postal Service at 8%
- Private Sector Delivery (FedEx, UPS) & suppliers at 9%
- Paper, Printing, Printing & Paper Industry Suppliers, & Direct Mail Design at 7%
- Management of Mail in all Industries at 30%
- Sales of Products and Services through Mail-Stream at 46%

76% of the 8.4 million jobs are in firms dependent upon the delivery infrastructure




Private industry accounts for 92% of the jobs. Postal service accounts for 8% of the jobs.

# Overall Comparison - 2012 vs. 2010 Results

- **Decline in Jobs**
  - ↓ Postal Service
  - ↓ Paper, Printing and Industry Suppliers
  - ↓ Mail Management in Business to Business Transactions
  - ↓ Traditional Direct Mail, Catalog, and Magazine

- **Growth in Jobs**
  - ↑ Private Mail Centers (i.e. Fed-ex, UPS)
  - ↑ Electronic Shopping and Mail Order Houses (i.e. Amazon)
  - ↑ Retail Sales Jobs at Retailers of Products Delivered through the Mail Stream

# Overall Summary

- **The U.S. mailing industry supports:**
  - 8.4 million mailing industry jobs
  - $1.3T in sales revenue, over 8.6% of U.S. GDP

- **Policies that have a dramatic influence on the mailing industry impact many workers**
  - Over 10 times as many jobs in the mailing industry private sector compared to the USPS
  - Over 76% of mailing industry jobs depend upon the delivery infrastructure of the USPS.

- **A viable postal service results in a healthier economy**

# Number of Mailing Industry Jobs and Sales Revenue Generated by State

# 2012 Mailing Industry Job Study
# Distribution of Jobs By State

| State | Jobs | State | Jobs | State | Jobs | State | Jobs |
|---|---|---|---|---|---|---|---|
| Alabama | 112,463 | Illinois | 380,439 | Montana | 26,879 | Rhode Island | 32,027 |
| Alaska | 21,864 | Indiana | 170,731 | Nebraska | 56,239 | South Carolina | 98,838 |
| Arizona | 136,987 | Iowa | 92,980 | Nevada | 60,161 | South Dakota | 32,467 |
| Arkansas | 66,884 | Kansas | 84,957 | New Hampshire | 63,689 | Tennessee | 226,075 |
| California | 966,901 | Kentucky | 114,212 | New Jersey | 265,193 | Texas | 551,988 |
| Colorado | 134,926 | Louisiana | 93,218 | New Mexico | 84,825 | Utah | 68,904 |
| Connecticut | 117,319 | Maine | 49,060 | New York | 539,539 | Vermont | 36,140 |
| Delaware | 26,201 | Maryland | 175,052 | North Carolina | 211,707 | Virginia | 226,743 |
| Dist. of Columbia | 71,359 | Massachusetts | 217,080 | North Dakota | 43,168 | Washington | 157,442 |
| Florida | 480,104 | Michigan | 266,223 | Ohio | 343,200 | West Virginia | 48,425 |
| Georgia | 229,191 | Minnesota | 171,077 | Oklahoma | 84,154 | Wisconsin | 180,238 |
| Hawaii | 34,760 | Mississippi | 73,883 | Oregon | 121,763 | Wyoming | 15,660 |
| Idaho | 62,923 | Missouri | 165,343 | Pennsylvania | 338,152 | | |

***Grand Total: 8,429,751 Mailing Industry Jobs***

# 2012 Mailing Industry Job Study
# Distribution of Sales Revenue By State

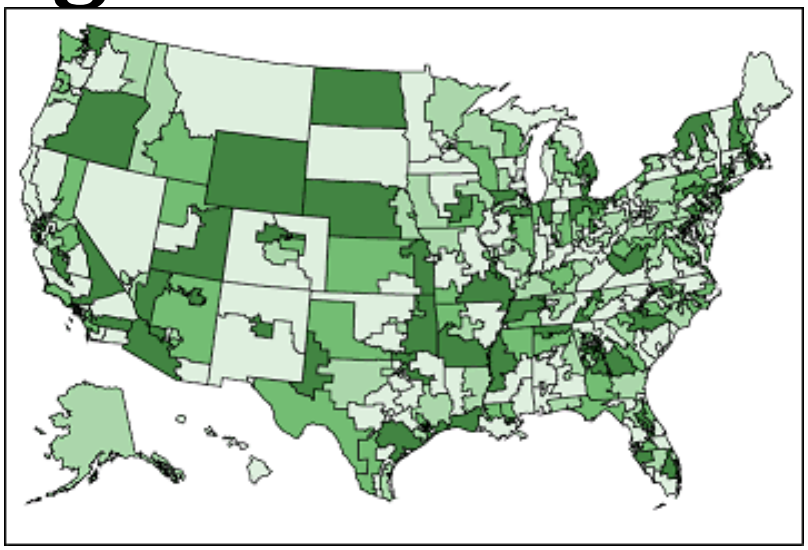
| State | Sales Revenue ($ Billions) | State | Sales Revenue ($ Billions) | State | Sales Revenue ($ Billions) | State | Sales Revenue ($ Billions) |
|---|---|---|---|---|---|---|---|
| Alabama | $14.1 | Illinois | $62.1 | Montana | $2.5 | Rhode Island | $3.4 |
| Alaska | $3.1 | Indiana | $24.6 | Nebraska | $9.4 | South Carolina | $12.8 |
| Arizona | $19.4 | Iowa | $11.3 | Nevada | $9.3 | South Dakota | $2.6 |
| Arkansas | $7.6 | Kansas | $11.2 | New Hampshire | $6.6 | Tennessee | $29.2 |
| California | $182.1 | Kentucky | $14.9 | New Jersey | $45.1 | Texas | $95.9 |
| Colorado | $20.5 | Louisiana | $14.4 | New Mexico | $5.3 | Utah | $10.8 |
| Connecticut | $24.9 | Maine | $5.4 | New York | $102.8 | Vermont | $3.7 |
| Delaware | $4.0 | Maryland | $23.6 | North Carolina | $32.9 | Virginia | $32.5 |
| Dist. of Columbia | $7.0 | Massachusetts | $35.2 | North Dakota | $2.5 | Washington | $29.5 |
| Florida | $72.0 | Michigan | $32.6 | Ohio | $56.4 | West Virginia | $4.6 |
| Georgia | $31.7 | Minnesota | $26.2 | Oklahoma | $9.4 | Wisconsin | $26.1 |
| Hawaii | $4.2 | Mississippi | $6.9 | Oregon | $13.6 | Wyoming | $2.2 |
| Idaho | $4.7 | Missouri | $23.0 | Pennsylvania | $55.1 | | |

***Grand Total: $1.290 Trillion of Sales Revenue***

# Number of Mailing Industry Jobs by Congressional District

# Job Distribution

**Mailing industry jobs are located throughout the U.S. and can be found in every Congressional District.**



# 2012 Mailing Industry Job Study
# Distribution of Jobs By District

| District | Jobs | District | Jobs | District | Jobs | District | Jobs | District | Jobs | District | Jobs |
|---|---|---|---|---|---|---|---|---|---|---|---|
| AK-00 | **21,864** | CA-01 | **15,789** | CA-21 | **10,425** | CA-41 | **8,887** | CT-01 | **36,845** | FL-14 | **16,869** |
| AL-01 | **13,970** | CA-02 | **13,277** | CA-22 | **13,255** | CA-42 | **16,673** | CT-02 | **15,880** | FL-15 | **14,625** |
| AL-02 | **15,756** | CA-03 | **11,102** | CA-23 | **15,241** | CA-43 | **14,001** | CT-03 | **19,239** | FL-16 | **13,144** |
| AL-03 | **14,290** | CA-04 | **14,664** | CA-24 | **16,772** | CA-44 | **16,068** | CT-04 | **26,289** | FL-17 | **11,114** |
| AL-04 | **12,316** | CA-05 | **20,639** | CA-25 | **11,006** | CA-45 | **12,834** | CT-05 | **19,065** | FL-18 | **21,877** |
| AL-05 | **16,766** | CA-06 | **16,169** | CA-26 | **14,888** | CA-46 | **24,134** | DC-00 | **71,359** | FL-19 | **11,645** |
| AL-06 | **16,201** | CA-07 | **10,461** | CA-27 | **15,306** | CA-47 | **15,920** | DE-00 | **26,201** | FL-20 | **18,171** |
| AL-07 | **23,163** | CA-08 | **88,740** | CA-28 | **17,716** | CA-48 | **31,873** | FL-01 | **13,055** | FL-21 | **56,213** |
| AR-01 | **13,228** | CA-09 | **15,806** | CA-29 | **22,308** | CA-49 | **11,116** | FL-02 | **15,790** | FL-22 | **24,249** |
| AR-02 | **23,554** | CA-10 | **14,587** | CA-30 | **50,459** | CA-50 | **21,685** | FL-03 | **20,272** | FL-23 | **20,326** |
| AR-03 | **17,475** | CA-11 | **16,590** | CA-31 | **12,054** | CA-51 | **8,783** | FL-04 | **22,035** | FL-24 | **13,662** |
| AR-04 | **12,626** | CA-12 | **21,739** | CA-32 | **11,752** | CA-52 | **13,920** | FL-05 | **9,417** | FL-25 | **9,330** |
| AZ-01 | **13,869** | CA-13 | **16,858** | CA-33 | **23,729** | CA-53 | **21,881** | FL-06 | **17,769** | GA-01 | **10,318** |
| AZ-02 | **9,661** | CA-14 | **17,202** | CA-34 | **35,644** | CO-01 | **27,632** | FL-07 | **27,105** | GA-02 | **12,963** |
| AZ-03 | **14,728** | CA-15 | **17,278** | CA-35 | **14,562** | CO-02 | **19,617** | FL-08 | **27,425** | GA-03 | **14,548** |
| AZ-04 | **23,932** | CA-16 | **12,429** | CA-36 | **20,963** | CO-03 | **15,445** | FL-09 | **12,769** | GA-04 | **16,072** |
| AZ-05 | **27,391** | CA-17 | **12,859** | CA-37 | **17,726** | CO-04 | **15,979** | FL-10 | **24,408** | GA-05 | **36,231** |
| AZ-06 | **10,823** | CA-18 | **14,334** | CA-38 | **16,331** | CO-05 | **16,917** | FL-11 | **29,115** | GA-06 | **30,246** |
| AZ-07 | **13,647** | CA-19 | **11,768** | CA-39 | **14,363** | CO-06 | **20,639** | FL-12 | **15,000** | GA-07 | **15,131** |
| AZ-08 | **22,936** | CA-20 | **11,313** | CA-40 | **21,023** | CO-07 | **18,697** | FL-13 | **14,719** | GA-08 | **11,983** |

# 2012 Mailing Industry Job Study
# Distribution of Jobs By District

| District | Jobs | District | Jobs | District | Jobs | District | Jobs | District | Jobs | District | Jobs |
|---|---|---|---|---|---|---|---|---|---|---|---|
| GA-09 | **15,318** | IL-07 | **69,763** | IN-08 | **17,314** | MA-02 | **14,767** | MI-02 | **16,399** | MN-07 | **15,174** |
| GA-10 | **16,644** | IL-08 | **18,367** | IN-09 | **18,277** | MA-03 | **19,112** | MI-03 | **26,805** | MN-08 | **15,922** |
| GA-11 | **17,002** | IL-09 | **16,839** | KS-01 | **17,076** | MA-04 | **15,377** | MI-04 | **14,755** | MO-01 | **33,264** |
| GA-12 | **14,860** | IL-10 | **31,516** | KS-02 | **15,863** | MA-05 | **17,290** | MI-05 | **13,452** | MO-02 | **18,280** |
| GA-13 | **17,873** | IL-11 | **15,289** | KS-03 | **32,640** | MA-06 | **32,837** | MI-06 | **17,067** | MO-03 | **14,341** |
| HI-01 | **22,165** | IL-12 | **12,236** | KS-04 | **19,378** | MA-07 | **21,185** | MI-07 | **15,928** | MO-04 | **11,044** |
| HI-02 | **12,595** | IL-13 | **25,735** | KY-01 | **15,434** | MA-08 | **29,535** | MI-08 | **13,885** | MO-05 | **29,917** |
| IA-01 | **19,404** | IL-14 | **17,161** | KY-02 | **17,074** | MA-09 | **29,536** | MI-09 | **29,352** | MO-06 | **16,930** |
| IA-02 | **18,874** | IL-15 | **15,801** | KY-03 | **32,884** | MA-10 | **16,899** | MI-10 | **12,131** | MO-07 | **15,926** |
| IA-03 | **24,499** | IL-16 | **16,844** | KY-04 | **16,959** | MD-01 | **16,810** | MI-11 | **21,535** | MO-08 | **12,490** |
| IA-04 | **15,626** | IL-17 | **17,892** | KY-05 | **11,015** | MD-02 | **19,239** | MI-12 | **25,139** | MO-09 | **13,152** |
| IA-05 | **14,578** | IL-18 | **15,092** | KY-06 | **20,845** | MD-03 | **27,244** | MI-13 | **12,752** | MS-01 | **19,258** |
| ID-01 | **29,101** | IL-19 | **14,855** | LA-01 | **13,168** | MD-04 | **14,975** | MI-14 | **9,829** | MS-02 | **17,908** |
| ID-02 | **33,822** | IN-01 | **15,691** | LA-02 | **18,745** | MD-05 | **27,796** | MI-15 | **21,938** | MS-03 | **20,137** |
| IL-01 | **8,070** | IN-02 | **16,670** | LA-03 | **11,503** | MD-06 | **22,394** | MN-01 | **17,879** | MS-04 | **16,581** |
| IL-02 | **8,465** | IN-03 | **22,518** | LA-04 | **11,328** | MD-07 | **21,878** | MN-02 | **17,781** | MT-00 | **26,879** |
| IL-03 | **14,500** | IN-04 | **15,203** | LA-05 | **11,260** | MD-08 | **24,716** | MN-03 | **24,235** | NC-01 | **12,183** |
| IL-04 | **9,262** | IN-05 | **20,456** | LA-06 | **14,634** | ME-01 | **27,374** | MN-04 | **27,631** | NC-02 | **10,751** |
| IL-05 | **17,522** | IN-06 | **14,220** | LA-07 | **12,580** | ME-02 | **21,686** | MN-05 | **37,138** | NC-03 | **10,156** |
| IL-06 | **35,231** | IN-07 | **30,382** | MA-01 | **20,540** | MI-01 | **15,255** | MN-06 | **15,317** | NC-04 | **19,537** |

# 2012 Mailing Industry Job Study
# Distribution of Jobs By District

| District | Jobs | District | Jobs | District | Jobs | District | Jobs | District | Jobs | District | Jobs |
|---|---|---|---|---|---|---|---|---|---|---|---|
| NC-05 | **13,320** | NJ-06 | **17,344** | NY-07 | **6,951** | NY-27 | **28,604** | OH-18 | **14,563** | PA-10 | **14,104** |
| NC-06 | **12,902** | NJ-07 | **20,076** | NY-08 | **62,041** | NY-28 | **18,879** | OK-01 | **21,820** | PA-11 | **16,204** |
| NC-07 | **12,984** | NJ-08 | **14,911** | NY-09 | **6,490** | NY-29 | **18,028** | OK-02 | **11,049** | PA-12 | **12,414** |
| NC-08 | **11,138** | NJ-09 | **38,223** | NY-10 | **7,378** | OH-01 | **19,006** | OK-03 | **13,320** | PA-13 | **18,880** |
| NC-09 | **16,447** | NJ-10 | **13,101** | NY-11 | **6,388** | OH-02 | **36,306** | OK-04 | **13,522** | PA-14 | **27,730** |
| NC-10 | **14,090** | NJ-11 | **30,931** | NY-12 | **14,537** | OH-03 | **23,664** | OK-05 | **24,444** | PA-15 | **16,075** |
| NC-11 | **14,640** | NJ-12 | **21,567** | NY-13 | **7,416** | OH-04 | **13,796** | OR-01 | **34,020** | PA-16 | **17,868** |
| NC-12 | **43,915** | NJ-13 | **18,261** | NY-14 | **81,373** | OH-05 | **14,086** | OR-02 | **20,792** | PA-17 | **17,443** |
| NC-13 | **19,642** | NM-01 | **35,509** | NY-15 | **6,626** | OH-06 | **11,032** | OR-03 | **23,849** | PA-18 | **15,586** |
| ND-00 | **43,168** | NM-02 | **23,038** | NY-16 | **6,018** | OH-07 | **11,214** | OR-04 | **20,564** | PA-19 | **19,215** |
| NE-01 | **16,818** | NM-03 | **26,278** | NY-17 | **10,034** | OH-08 | **16,282** | OR-05 | **22,537** | RI-01 | **15,358** |
| NE-02 | **22,728** | NV-01 | **22,188** | NY-18 | **20,039** | OH-09 | **26,712** | PA-01 | **36,182** | RI-02 | **16,669** |
| NE-03 | **16,692** | NV-02 | **20,083** | NY-19 | **12,715** | OH-10 | **26,966** | PA-02 | **16,783** | SC-01 | **16,538** |
| NH-01 | **31,777** | NV-03 | **17,890** | NY-20 | **13,222** | OH-11 | **21,587** | PA-03 | **13,351** | SC-02 | **16,375** |
| NH-02 | **31,912** | NY-01 | **13,085** | NY-21 | **20,776** | OH-12 | **22,514** | PA-04 | **13,381** | SC-03 | **12,509** |
| NJ-01 | **20,200** | NY-02 | **26,152** | NY-22 | **17,286** | OH-13 | **13,142** | PA-05 | **13,388** | SC-04 | **19,478** |
| NJ-02 | **15,377** | NY-03 | **14,189** | NY-23 | **12,128** | OH-14 | **15,332** | PA-06 | **19,792** | SC-05 | **13,893** |
| NJ-03 | **19,859** | NY-04 | **18,939** | NY-24 | **36,080** | OH-15 | **29,045** | PA-07 | **19,087** | SC-06 | **20,045** |
| NJ-04 | **14,595** | NY-05 | **11,927** | NY-25 | **17,590** | OH-16 | **14,564** | PA-08 | **16,834** | SD-00 | **32,467** |
| NJ-05 | **20,748** | NY-06 | **9,216** | NY-26 | **15,429** | OH-17 | **13,389** | PA-09 | **13,835** | TN-01 | **17,449** |

# 2012 Mailing Industry Job Study
# Distribution of Jobs By District

| District | Jobs | District | Jobs | District | Jobs | District | Jobs |
|---|---|---|---|---|---|---|---|
| TN-02 | **22,271** | TX-13 | **12,224** | UT-01 | **25,369** | WA-06 | **13,136** |
| TN-03 | **22,172** | TX-14 | **10,405** | UT-02 | **24,939** | WA-07 | **31,264** |
| TN-04 | **14,387** | TX-15 | **8,505** | UT-03 | **18,596** | WA-08 | **14,534** |
| TN-05 | **42,167** | TX-16 | **13,414** | VA-01 | **17,650** | WA-09 | **21,054** |
| TN-06 | **17,173** | TX-17 | **13,526** | VA-02 | **12,397** | WI-01 | **21,175** |
| TN-07 | **20,857** | TX-18 | **31,366** | VA-03 | **36,131** | WI-02 | **24,648** |
| TN-08 | **17,911** | TX-19 | **13,208** | VA-04 | **19,473** | WI-03 | **18,838** |
| TN-09 | **51,687** | TX-20 | **48,727** | VA-05 | **15,467** | WI-04 | **20,387** |
| TX-01 | **13,547** | TX-21 | **19,571** | VA-06 | **21,195** | WI-05 | **27,567** |
| TX-02 | **11,281** | TX-22 | **13,003** | VA-07 | **20,677** | WI-06 | **21,850** |
| TX-03 | **19,252** | TX-23 | **11,120** | VA-08 | **24,579** | WI-07 | **20,509** |
| TX-04 | **12,769** | TX-24 | **31,083** | VA-09 | **13,290** | WI-08 | **25,263** |
| TX-05 | **9,882** | TX-25 | **12,948** | VA-10 | **29,813** | WV-01 | **18,105** |
| TX-06 | **12,284** | TX-26 | **16,147** | VA-11 | **16,071** | WV-02 | **17,269** |
| TX-07 | **26,641** | TX-27 | **10,565** | VT-00 | **36,140** | WV-03 | **13,051** |
| TX-08 | **10,288** | TX-28 | **12,315** | WA-01 | **18,079** | WY-00 | **15,660** |
| TX-09 | **13,227** | TX-29 | **15,104** | WA-02 | **16,186** | **Total** | **8,429,751** |
| TX-10 | **16,809** | TX-30 | **30,847** | WA-03 | **14,602** | | |
| TX-11 | **12,550** | TX-31 | **10,424** | WA-04 | **13,281** | | |
| TX-12 | **16,491** | TX-32 | **42,464** | WA-05 | **15,305** | | |

# Sales Revenue Generated by Congressional District

# 2012 Mailing Industry Job Study
# Distribution of Revenue By District

| District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| AK-00 | **$3,055** | CA-01 | **$2,417** | CA-21 | **$1,761** | CA-41 | **$1,384** | CT-01 | **$9,421** | FL-14 | **$2,380** |
| AL-01 | **$1,756** | CA-02 | **$1,789** | CA-22 | **$1,884** | CA-42 | **$3,149** | CT-02 | **$2,470** | FL-15 | **$1,866** |
| AL-02 | **$1,771** | CA-03 | **$1,968** | CA-23 | **$3,191** | CA-43 | **$2,466** | CT-03 | **$3,300** | FL-16 | **$3,163** |
| AL-03 | **$1,573** | CA-04 | **$2,268** | CA-24 | **$3,486** | CA-44 | **$2,383** | CT-04 | **$5,139** | FL-17 | **$1,863** |
| AL-04 | **$1,301** | CA-05 | **$2,876** | CA-25 | **$1,960** | CA-45 | **$1,888** | CT-05 | **$4,593** | FL-18 | **$2,901** |
| AL-05 | **$2,304** | CA-06 | **$3,647** | CA-26 | **$3,613** | CA-46 | **$3,572** | DC-00 | **$7,004** | FL-19 | **$2,464** |
| AL-06 | **$2,495** | CA-07 | **$1,795** | CA-27 | **$3,576** | CA-47 | **$2,378** | DE-00 | **$3,995** | FL-20 | **$2,770** |
| AL-07 | **$2,931** | CA-08 | **$7,277** | CA-28 | **$8,776** | CA-48 | **$6,962** | FL-01 | **$1,697** | FL-21 | **$4,249** |
| AR-01 | **$1,360** | CA-09 | **$2,692** | CA-29 | **$4,176** | CA-49 | **$2,938** | FL-02 | **$1,775** | FL-22 | **$3,885** |
| AR-02 | **$2,595** | CA-10 | **$2,379** | CA-30 | **$17,655** | CA-50 | **$4,060** | FL-03 | **$3,573** | FL-23 | **$2,433** |
| AR-03 | **$2,330** | CA-11 | **$3,227** | CA-31 | **$2,078** | CA-51 | **$1,397** | FL-04 | **$2,687** | FL-24 | **$1,762** |
| AR-04 | **$1,288** | CA-12 | **$3,447** | CA-32 | **$1,705** | CA-52 | **$2,919** | FL-05 | **$1,216** | FL-25 | **$1,454** |
| AZ-01 | **$1,580** | CA-13 | **$3,370** | CA-33 | **$7,993** | CA-53 | **$2,971** | FL-06 | **$2,269** | GA-01 | **$1,276** |
| AZ-02 | **$1,567** | CA-14 | **$3,823** | CA-34 | **$5,716** | CO-01 | **$3,673** | FL-07 | **$4,006** | GA-02 | **$1,355** |
| AZ-03 | **$2,375** | CA-15 | **$4,151** | CA-35 | **$2,159** | CO-02 | **$3,131** | FL-08 | **$3,643** | GA-03 | **$2,265** |
| AZ-04 | **$3,574** | CA-16 | **$4,070** | CA-36 | **$3,240** | CO-03 | **$2,384** | FL-09 | **$1,835** | GA-04 | **$2,359** |
| AZ-05 | **$4,731** | CA-17 | **$2,355** | CA-37 | **$3,207** | CO-04 | **$2,119** | FL-10 | **$8,745** | GA-05 | **$5,080** |
| AZ-06 | **$1,767** | CA-18 | **$1,988** | CA-38 | **$2,720** | CO-05 | **$3,514** | FL-11 | **$4,872** | GA-06 | **$4,263** |
| AZ-07 | **$1,961** | CA-19 | **$1,909** | CA-39 | **$2,149** | CO-06 | **$3,308** | FL-12 | **$2,461** | GA-07 | **$2,839** |
| AZ-08 | **$1,814** | CA-20 | **$1,450** | CA-40 | **$3,611** | CO-07 | **$2,397** | FL-13 | **$2,052** | GA-08 | **$1,580** |

# 2012 Mailing Industry Job Study
# Distribution of Revenue By District

| District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| GA-09 | $2,352 | IL-07 | $8,008 | IN-08 | $2,790 | MA-02 | $1,764 | MI-02 | $1,813 | MN-07 | $1,834 |
| GA-10 | $2,321 | IL-08 | $3,214 | IN-09 | $2,253 | MA-03 | $2,821 | MI-03 | $3,920 | MN-08 | $2,240 |
| GA-11 | $2,340 | IL-09 | $3,919 | KS-01 | $1,662 | MA-04 | $2,326 | MI-04 | $1,946 | MO-01 | $5,589 |
| GA-12 | $1,638 | IL-10 | $7,750 | KS-02 | $1,849 | MA-05 | $2,587 | MI-05 | $1,429 | MO-02 | $2,601 |
| GA-13 | $2,076 | IL-11 | $2,497 | KS-03 | $4,347 | MA-06 | $3,832 | MI-06 | $1,899 | MO-03 | $2,059 |
| HI-01 | $2,848 | IL-12 | $1,846 | KS-04 | $3,331 | MA-07 | $4,990 | MI-07 | $1,854 | MO-04 | $1,509 |
| HI-02 | $1,385 | IL-13 | $5,999 | KY-01 | $1,630 | MA-08 | $4,737 | MI-08 | $1,713 | MO-05 | $3,367 |
| IA-01 | $2,200 | IL-14 | $2,630 | KY-02 | $2,165 | MA-09 | $5,533 | MI-09 | $3,712 | MO-06 | $2,362 |
| IA-02 | $2,702 | IL-15 | $2,116 | KY-03 | $4,619 | MA-10 | $3,791 | MI-10 | $1,659 | MO-07 | $2,400 |
| IA-03 | $2,886 | IL-16 | $2,537 | KY-04 | $2,078 | MD-01 | $2,355 | MI-11 | $3,386 | MO-08 | $1,387 |
| IA-04 | $1,708 | IL-17 | $2,490 | KY-05 | $1,313 | MD-02 | $2,852 | MI-12 | $2,558 | MO-09 | $1,700 |
| IA-05 | $1,816 | IL-18 | $2,100 | KY-06 | $3,080 | MD-03 | $3,474 | MI-13 | $1,586 | MS-01 | $1,877 |
| ID-01 | $2,658 | IL-19 | $1,801 | LA-01 | $2,600 | MD-04 | $2,314 | MI-14 | $875 | MS-02 | $1,572 |
| ID-02 | $2,060 | IN-01 | $1,842 | LA-02 | $1,829 | MD-05 | $3,447 | MI-15 | $2,618 | MS-03 | $1,721 |
| IL-01 | $1,503 | IN-02 | $2,288 | LA-03 | $2,374 | MD-06 | $2,783 | MN-01 | $2,705 | MS-04 | $1,722 |
| IL-02 | $1,040 | IN-03 | $3,543 | LA-04 | $1,691 | MD-07 | $2,709 | MN-02 | $3,195 | MT-00 | $2,456 |
| IL-03 | $2,279 | IN-04 | $2,283 | LA-05 | $1,602 | MD-08 | $3,703 | MN-03 | $5,366 | NC-01 | $2,069 |
| IL-04 | $1,535 | IN-05 | $2,721 | LA-06 | $2,449 | ME-01 | $3,195 | MN-04 | $4,553 | NC-02 | $1,859 |
| IL-05 | $2,126 | IN-06 | $1,751 | LA-07 | $1,804 | ME-02 | $2,224 | MN-05 | $4,007 | NC-03 | $1,365 |
| IL-06 | $6,703 | IN-07 | $5,074 | MA-01 | $2,815 | MI-01 | $1,590 | MN-06 | $2,248 | NC-04 | $3,654 |

# 2012 Mailing Industry Job Study
# Distribution of Revenue By District

| District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| NC-05 | **$1,988** | NJ-06 | **$2,957** | NY-07 | **$1,258** | NY-27 | **$2,586** | OH-18 | **$1,664** | PA-10 | **$1,919** |
| NC-06 | **$2,261** | NJ-07 | **$3,236** | NY-08 | **$19,479** | NY-28 | **$2,451** | OK-01 | **$2,853** | PA-11 | **$2,231** |
| NC-07 | **$1,788** | NJ-08 | **$2,379** | NY-09 | **$977** | NY-29 | **$3,045** | OK-02 | **$1,096** | PA-12 | **$1,711** |
| NC-08 | **$1,964** | NJ-09 | **$6,044** | NY-10 | **$1,091** | OH-01 | **$2,766** | OK-03 | **$1,458** | PA-13 | **$3,563** |
| NC-09 | **$3,295** | NJ-10 | **$2,125** | NY-11 | **$856** | OH-02 | **$3,009** | OK-04 | **$1,404** | PA-14 | **$2,971** |
| NC-10 | **$2,074** | NJ-11 | **$5,547** | NY-12 | **$2,192** | OH-03 | **$3,677** | OK-05 | **$2,575** | PA-15 | **$2,450** |
| NC-11 | **$2,325** | NJ-12 | **$3,319** | NY-13 | **$1,211** | OH-04 | **$2,031** | OR-01 | **$4,429** | PA-16 | **$3,747** |
| NC-12 | **$4,836** | NJ-13 | **$2,953** | NY-14 | **$22,871** | OH-05 | **$1,720** | OR-02 | **$2,118** | PA-17 | **$2,935** |
| NC-13 | **$3,370** | NM-01 | **$2,447** | NY-15 | **$1,081** | OH-06 | **$1,463** | OR-03 | **$2,774** | PA-18 | **$2,418** |
| ND-00 | **$2,502** | NM-02 | **$1,134** | NY-16 | **$964** | OH-07 | **$1,776** | OR-04 | **$2,026** | PA-19 | **$3,540** |
| NE-01 | **$2,466** | NM-03 | **$1,699** | NY-17 | **$1,726** | OH-08 | **$3,259** | OR-05 | **$2,243** | RI-01 | **$1,478** |
| NE-02 | **$3,807** | NV-01 | **$3,313** | NY-18 | **$4,348** | OH-09 | **$3,601** | PA-01 | **$3,620** | RI-02 | **$1,929** |
| NE-03 | **$3,080** | NV-02 | **$2,894** | NY-19 | **$2,241** | OH-10 | **$4,865** | PA-02 | **$2,392** | SC-01 | **$2,121** |
| NH-01 | **$3,212** | NV-03 | **$3,122** | NY-20 | **$1,958** | OH-11 | **$2,380** | PA-03 | **$3,259** | SC-02 | **$2,296** |
| NH-02 | **$3,416** | NY-01 | **$1,913** | NY-21 | **$3,393** | OH-12 | **$3,692** | PA-04 | **$2,181** | SC-03 | **$1,705** |
| NJ-01 | **$3,009** | NY-02 | **$5,729** | NY-22 | **$2,725** | OH-13 | **$1,789** | PA-05 | **$1,740** | SC-04 | **$2,938** |
| NJ-02 | **$2,523** | NY-03 | **$2,276** | NY-23 | **$1,596** | OH-14 | **$2,703** | PA-06 | **$3,733** | SC-05 | **$1,883** |
| NJ-03 | **$3,689** | NY-04 | **$4,181** | NY-24 | **$1,891** | OH-15 | **$12,208** | PA-07 | **$4,740** | SC-06 | **$1,881** |
| NJ-04 | **$2,660** | NY-05 | **$2,475** | NY-25 | **$2,766** | OH-16 | **$2,179** | PA-08 | **$4,000** | SD-00 | **$2,604** |
| NJ-05 | **$4,692** | NY-06 | **$1,152** | NY-26 | **$2,359** | OH-17 | **$1,577** | PA-09 | **$1,894** | TN-01 | **$2,443** |

# 2012 Mailing Industry Job Study
# Distribution of Revenue By District

| District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) | District | Sales Revenue ($ Millions) |
|---|---|---|---|---|---|---|---|
| TN-02 | **$3,702** | TX-13 | **$1,621** | UT-01 | **$3,559** | WA-06 | **$2,130** |
| TN-03 | **$2,673** | TX-14 | **$1,540** | UT-02 | **$3,796** | WA-07 | **$7,109** |
| TN-04 | **$1,713** | TX-15 | **$1,423** | UT-03 | **$3,414** | WA-08 | **$2,879** |
| TN-05 | **$5,442** | TX-16 | **$2,458** | VA-01 | **$2,193** | WA-09 | **$4,403** |
| TN-06 | **$2,318** | TX-17 | **$1,930** | VA-02 | **$1,860** | WI-01 | **$3,230** |
| TN-07 | **$2,502** | TX-18 | **$4,807** | VA-03 | **$3,081** | WI-02 | **$4,464** |
| TN-08 | **$2,422** | TX-19 | **$1,913** | VA-04 | **$2,746** | WI-03 | **$2,566** |
| TN-09 | **$5,957** | TX-20 | **$3,448** | VA-05 | **$2,164** | WI-04 | **$2,322** |
| TX-01 | **$2,342** | TX-21 | **$3,513** | VA-06 | **$4,051** | WI-05 | **$4,116** |
| TX-02 | **$1,842** | TX-22 | **$2,387** | VA-07 | **$3,459** | WI-06 | **$3,532** |
| TX-03 | **$4,561** | TX-23 | **$1,532** | VA-08 | **$4,384** | WI-07 | **$3,077** |
| TX-04 | **$1,940** | TX-24 | **$7,945** | VA-09 | **$1,988** | WI-08 | **$2,784** |
| TX-05 | **$1,512** | TX-25 | **$2,244** | VA-10 | **$4,411** | WV-01 | **$1,694** |
| TX-06 | **$2,048** | TX-26 | **$2,721** | VA-11 | **$2,148** | WV-02 | **$1,772** |
| TX-07 | **$4,186** | TX-27 | **$1,540** | VT-00 | **$3,692** | WV-03 | **$1,111** |
| TX-08 | **$1,457** | TX-28 | **$1,699** | WA-01 | **$3,617** | WY-00 | **$2,197** |
| TX-09 | **$2,020** | TX-29 | **$2,204** | WA-02 | **$2,762** | **Total** | **$1,290,392** |
| TX-10 | **$4,072** | TX-30 | **$10,382** | WA-03 | **$2,177** | | |
| TX-11 | **$1,762** | TX-31 | **$2,282** | WA-04 | **$1,773** | | |
| TX-12 | **$2,696** | TX-32 | **$7,839** | WA-05 | **$2,651** | | |

# Detailed Data & Methodology

# The Results - # of Jobs and Sales Revenue 2011 vs. 2009

**The mailing industry provided:**

- 8.4 million jobs in 2011 vs. 8.8 million jobs in 2009
- $1.3 trillion in sales revenue in 2011 vs. $1.2 trillion in sales revenue 2009

# Mailing Industry Job Categories

**Jobs decreased by 4.5% totaling nearly 400,000 jobs due to losses of jobs in all major categories with the greatest loss in manufacturing jobs.**

| Categories | 2009 # of Jobs | 2011 # of Jobs | % Change | # of Jobs |
|---|---|---|---|---|
| Manufacturing - Mail Production, Distribution and Handling | 2,186,216 | 2,013,070 | -7.9% | -173,146 |
| Management of Mail in all Industries | 2,633,694 | 2,515,679 | -4.5% | -118,015 |
| Sales of Mail Delivered Products & Services | 4,004,194 | 3,901,002 | -2.6% | -103,192 |
| Total | 8,824,104 | 8,429,751 | -4.5% | -394,353 |

# Mail Production, Distribution and Handling

**With the loss of overall mail volume, mail production, distribution, and handling jobs have also been reduced.**

- **Jobs with Mail Production, Distribution & Handling dropped 7.9% with a 173M job loss.**

- **Some of the major job losses included:**
  - Postal Service with 72M jobs at a loss of 9.9%
    - From 720,200 jobs in 2009 to 648,350 jobs in 2011
  - Private Sector Delivery with 31M jobs at a loss of 5.2%
  - Paper, Printing, Printing Industry Suppliers, & Direct Mail Converting & Management with 80M jobs at a loss of 11.4%

# Management of Mail (Business to Business Interaction)

**As businesses have moved to email interaction, there are less business to business jobs associated with mailing letters and packages.**

- **Management of Mail in all Industries dropped 4.5% with a 118M job loss.**
  - This trend is expected to continue as businesses move to more email interaction as opposed to traditional mail.

# Sales of Mail Delivered Products

**Delivered product sales are not only originating from printed catalogs, magazines, and direct mail but are now also originating through the internet (on-line sales) which are still delivered through the mail stream**

- **Jobs with Mail Delivered Products dropped 2.9% with a 103M job loss.**
  - Some of the major job losses included:
    - Catalog direct mail generated sales at a loss of 5.4%
    - Direct response magazine ad sales at a loss of 13.7%
  - As expected, some of the job gains included products that are shipped to homes and businesses due to ordering through the internet; however, these categories are still considerably smaller:
    - Electronic shopping & mail order houses at a gain of 3.9%
    - Internet retail sales from traditional stores at a large gain of 26.5%

# $1.3 Trillion in Sales Revenue

# Sales Revenue Categories

**Sales revenue increased by 9% due to more packaged products being delivered through the mail stream.**

| Categories | Description | 2009 Sales ($ Billions) | 2011 Sales ($ Billions) | % Change | Sales ($ Billions) |
|---|---|---|---|---|---|
| **Mail Production, Distribution and Handling** | Producing the Mail | $117.10 | $113.05 | -3.6% | -$4.05 |
| | Delivering the Mail and Parcels | $143.96 | $145.08 | 0.8% | $1.12 |
| **Sales of Mail Delivered Products & Services** | Sales of Products / Services Delivered by the Mailing Industry | $908.21 | $1,032.27 | 12.0% | $124.05 |
| **Total** | | **$1,169.27** | **$1,290.39** | **9%** | **$121.12** |

# Mail Production, Distribution & Handling

- **Mail Production, Distribution & Handling**
  - Producing the Mail had a sales revenue drop of 3.6%.
  - Delivering the Mail had a sales revenue gain of +0.8%.
    - Some of this small gain may be attributed to the higher price of delivering packages.

# Sales of Mail Delivered Products & Services

- **Sales of Mail Delivered Products & Services had an overall sales revenue increase of 12.0%.**
  - Significant gains were observed with:
    - Direct mail at 12% with total sales revenue generated of $506 billion
    - Catalogs at 12% with total sales revenue generated of $126 billion
    - Electronic Shopping and mail-order at 29% with total sales revenue generated of $221 billion

DELL amazon.com

Walmart
Save money. Live better.