

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:

**\$1.3 Trillion 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.**

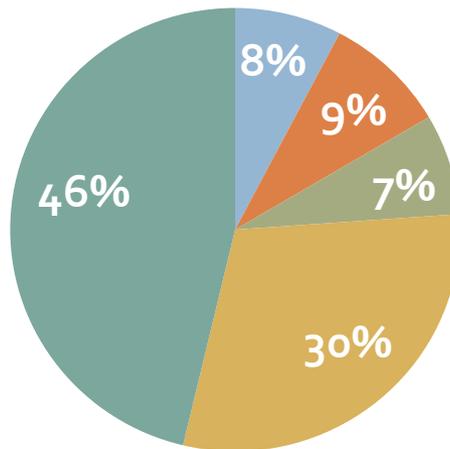
2012 Mailing Industry Job Study

- **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		

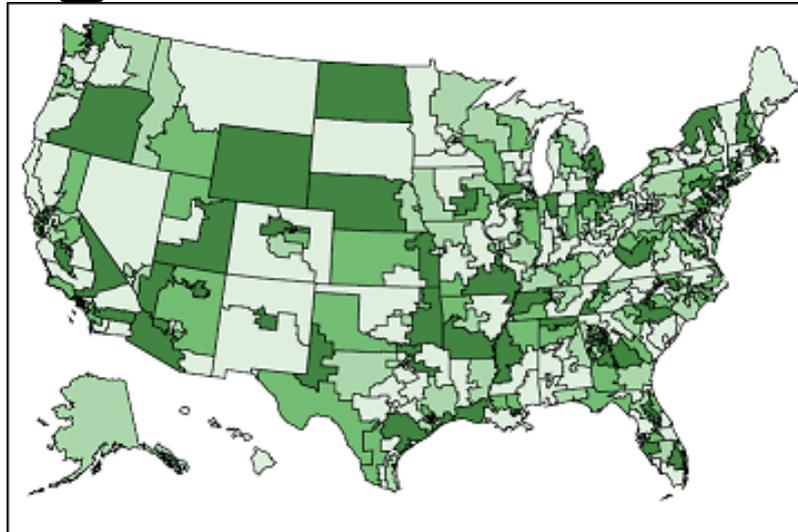
Grand Total: \$1.290 Trillion of Sales Revenue

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										
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										
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										
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)										
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)										
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)										
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



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