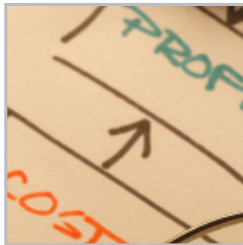
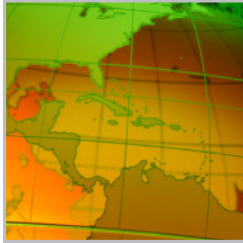


The Emergence of Digital Mailbox Services Moving Beyond Online Bill Consolidation in the U.S.



Production Printing & Media



- >> Who is using a mail consolidation service today? Who plans to?
- >> Which features are most important? Least important?
- >> What are consumer concerns around these services?
- >> What do billers think about these services? Do they plan to partner?
- >> What is the opportunity for marketers and customer communications?
- >> Who are the key players in this market? How do they compare?
- >> Who are some of the international players?
- >> What is the current market size for these services and what will the market look like in 2015?
- >> What is the impact on traditional transactional mail and print volume?
- >> What are the channel implications for the future?
- >> How would new entrants impact the market landscape?





the emergence of digital mailbox services:
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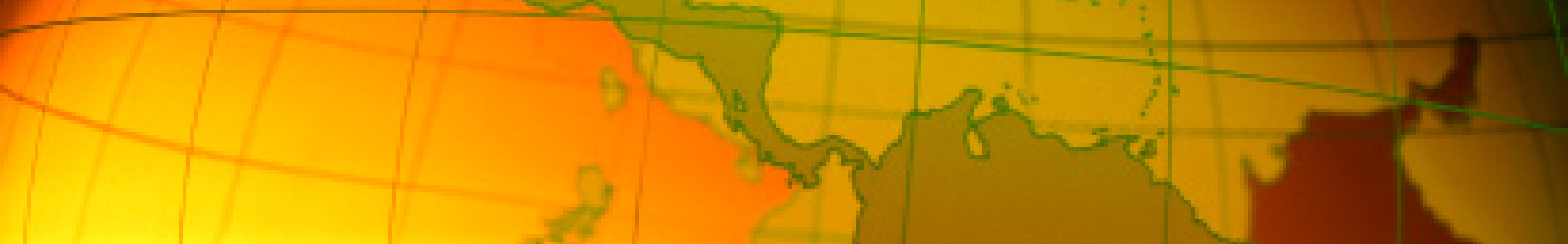
As a testament to its relevance in a movement toward paperless communications, the secure digital mailbox services channel is receiving attention from high-profile investors and Fortune 500 companies alike. In fact, InfoTrends expects this market to grow to 2 billion documents by 2015. Any company in the business of enabling customer communications—biller, direct marketer, service provider, or vendor—should be closely monitoring growth in this channel and developing a strategy around it.

>>Introduction

InfoTrends' research shows that about 15% of consumer bills and statements are sent exclusively through electronic means in the United States, and this share is expected to reach 36% by 2015. InfoTrends' updated paperless delivery forecast is more aggressive than last year's due in part to the entrance of digital mailbox services—secure delivery services that provide functionality beyond traditional bill consolidators.

Digital mailbox services announced and available in the U.S. today include doxo, Manilla, Volly, and Zumbox. These companies are rapidly building business partnerships and consumer relationships. While there is no question that these services will have an influence on paperless delivery and payment, the real question for service bureaus, billers, financial institutions, the Postal Service, and digital mailbox service providers, is how quickly they will impact the market.





>>Who Should Subscribe?

>Vendors and Service Providers

You have thrived off of the print and mail business, but it is crucial to look toward future opportunities within emerging channels. This study will provide insight into the support your customers require in this channel and provide strategic support regarding how to move forward with initiatives in this space.

>Enterprise Organizations

Your website represents one more location that customers have to visit if they go paperless. For customers who seek an alternative, what other options are you providing them with? This study will specifically review the secure digital mailbox services channel and help you decide which services will be the best fit internally and most relevant to your customers' needs.

>>Objectives

This study provides answers to questions surrounding the secure digital mailbox services market from the perspective of:

- > Consumers
- > Billers
- > Print and Marketing Service Providers
- > Vendors
- > Corporate Enterprises

Primary objectives include:

- > Current state analysis on digital mailbox services
- > Review of the key players in the United States and insight from abroad
- > Market sizing and forecast (2010-2015)
- > Scenario planning and strategy recommendations

>>Market Research

InfoTrends' study methodology encompasses primary and secondary research, coupled with analysis of market news and trends in the United States and abroad.

>Consumer Survey

1,528 web-based surveys of residents of the United States who were at least age 18 and the primary person responsible for household mail management.

>Business Survey

301 web-based surveys of businesses in the United States, including coverage of the financial, government, healthcare, insurance, retail, telecommunications, travel, and utility markets were examined. Respondents had a vested interest in customer communications with half most familiar with billing operations, and half most familiar with marketing.

>In-depth Interviews

25 in-depth phone interviews with billers, direct marketers, mailers, technology vendors and service providers to complement the quantitative research. These interviews have been aggregated to reveal macro trends related to the secure digital mailbox services market.





>Secondary Research

InfoTrends has thoroughly examined existing market information on key applications, market segments, competitors, and product categories using a variety of sources, including industry trade associations, government agencies, published industry reports, trade articles, industry databases, company Websites, and other sources (including vendor white papers, user groups, and research reports). InfoTrends also leverages research it had previously published as part of its continuous consulting services and research.

>Forecast Development

By combining the qualitative research with the quantitative interviews, secondary research, and existing internal information in adjacent markets, InfoTrends has compiled a complete evaluation of the digital mailbox services market, including a current state and long-term outlook.

>>Analysis & Project Deliverables

InfoTrends' professional staff has performed an extensive analysis of the research to develop an understanding of the opportunities and issues surrounding digital mailbox services in the United States. Subscribers will receive:

- > Executive Summary addressing key issues, findings, and overall recommendations
- > Detailed written report with text, charts, and graphs addressing the objectives of the study
- > PowerPoint slides containing all survey charts
- > Market sizing and five year forecast of

paperless delivery of transaction documents to consumers via digital mailboxes

- > Cross-tabulations of the survey results for additional analysis of key questions and market segmentation (e.g., vertical market insight)
- > Webinar presentation (optional)
- > On-site presentation (optional)

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>>Authorization Form

Any company in the business of enabling customer communications—biller, direct marketer, service provider, or vendor—should be closely monitoring growth in the secure digital mailbox services channel and developing a strategy around it.

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InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses.

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