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MCA Market Research: Postal Services – Household Survey Results

Published: 26th April 2017



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Purpose & Methodology

Assess the extent of household satisfaction with the services provided by MaltaPost (USP)

Monitor a number of postal services aspects, namely: price levels, quality, access and complaints handling

Provide for better regulatory decisions

Grant Thornton carried out the survey November and December 2016 on behalf of the MCA

Fieldwork

- Interviews lasting around 20 minutes were carried out by telephone
- The survey respondents were chosen randomly from the range of GO fixed telephone numbers
- Only one person per household was interviewed and all respondents were over 18 years old

Sample

- Sample size was proportionally distributed across the 8 postal regions defined by MaltaPost
- The interviews were carried out with households that have been randomly selected on the basis of this distribution
- Each respondent was the person responsible for mail items in that household

Responses

- 500 net respondents
- Any refusals / incomplete surveys were re-allocated to achieve a net sample of 500 interviewees
- Margin of error +/- 4.38% at 95% confidence interval

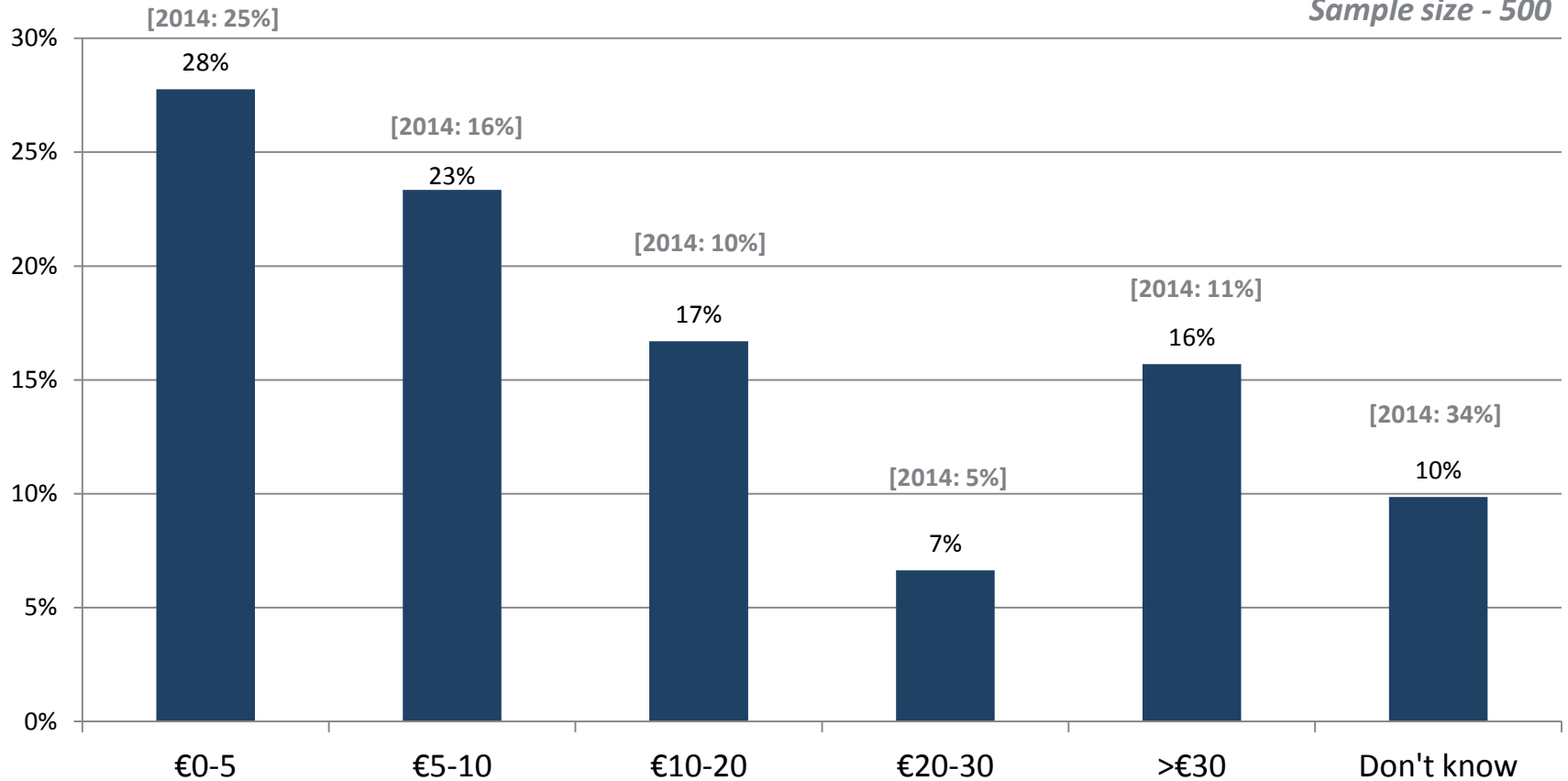


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Activity of Postal Services in Maltese Households

What is the average amount of money spent by your household on posting articles during the past 12 months?

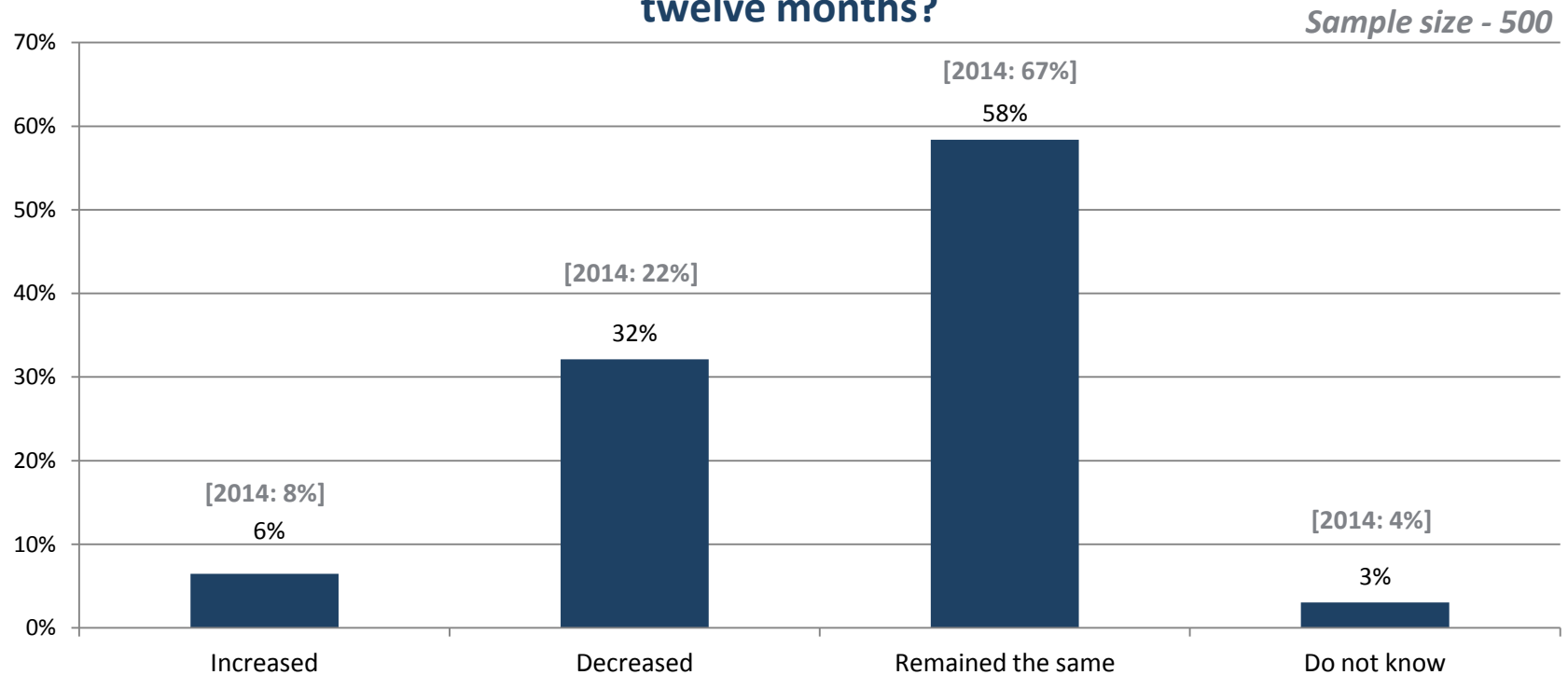
Sample size - 500



23% of households spend more than €20 on postal articles (16% in 2014).

Section 1: Letters

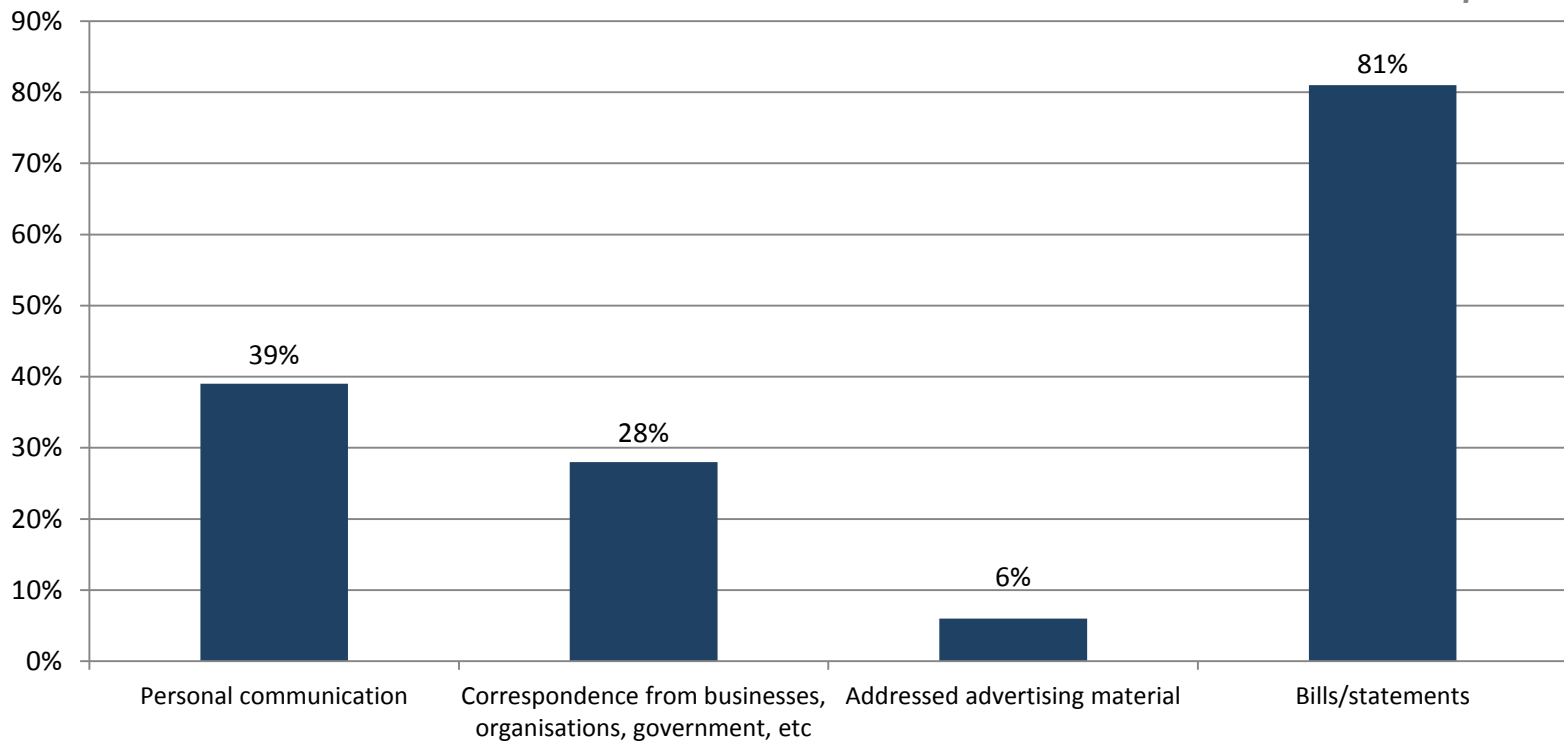
Can you tell me if the number of addressed letters received each week has increased, decreased or remained the same over the past twelve months?



The amount of households indicating a decrease in received letters grew from 22% (2014) to 32%.

What type of addressed letters did you receive in the last 12 months?

Sample size - 500



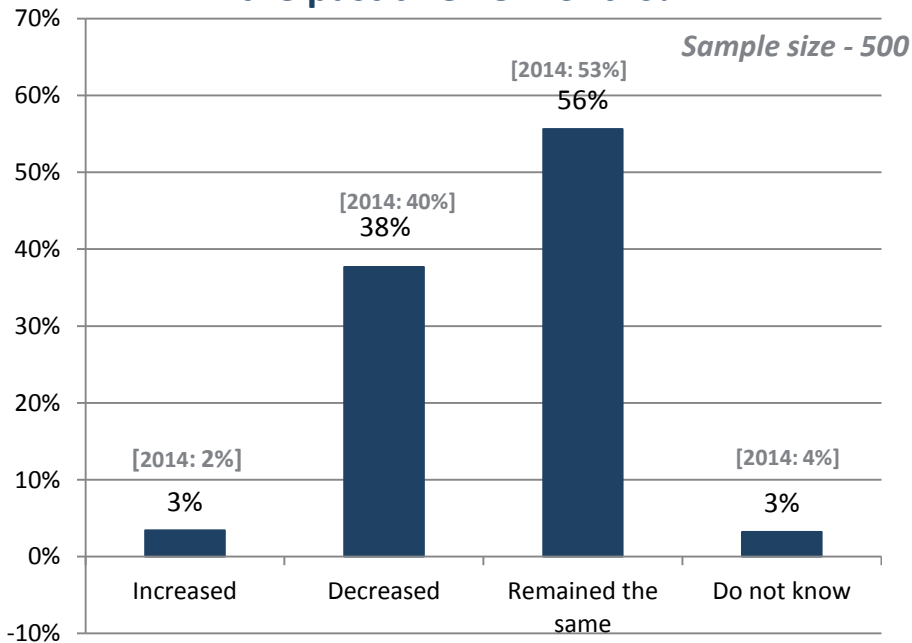
The majority of respondents claimed that most of the letters they receive are bills/statements (more than one type could be selected).



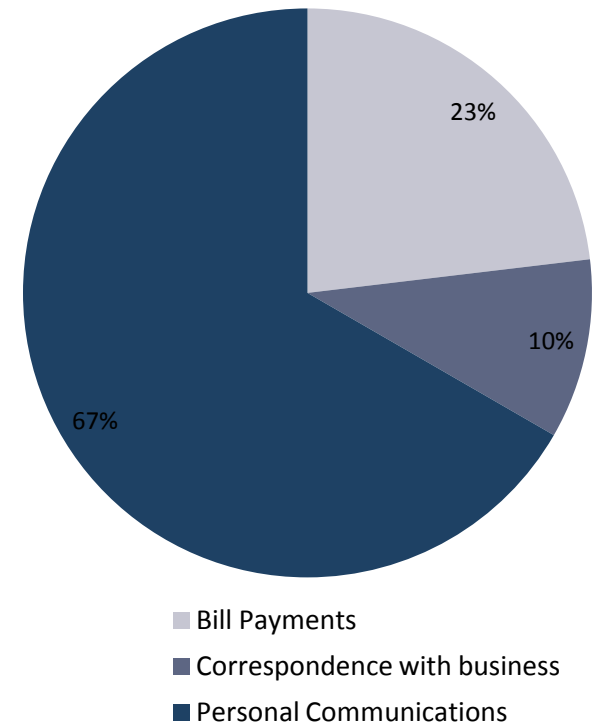
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Trends: sending letters

Can you tell me if the number of letters sent each week has increased, decreased or remained the same over the past twelve months?



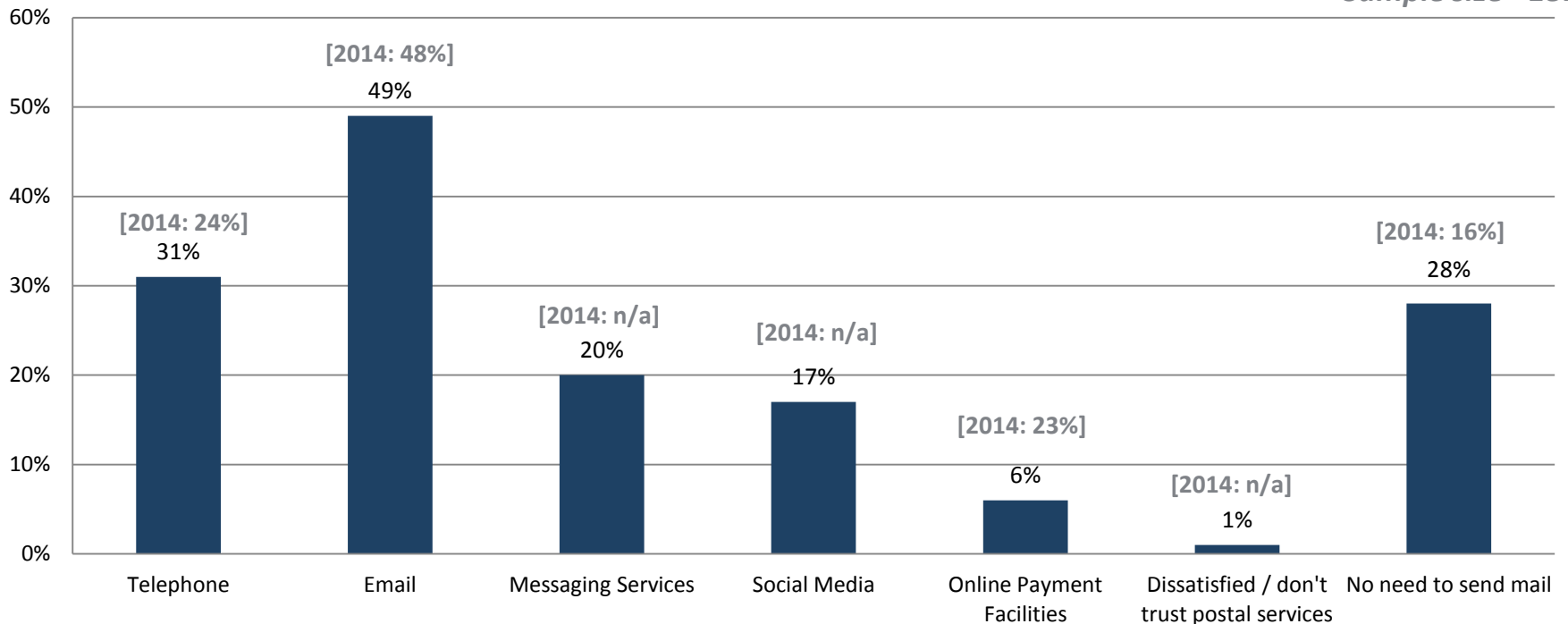
What type of letters did you send?



There was little variance between 2014 and 2016: the majority of respondents claimed that the number of letters they sent in the last 12 months neither increased nor decreased. Letter mail was mainly used for personal communication, followed by bill payments.

If there was a decrease in the number of addressed letters sent, what in your opinion is/are the main reason(s)?

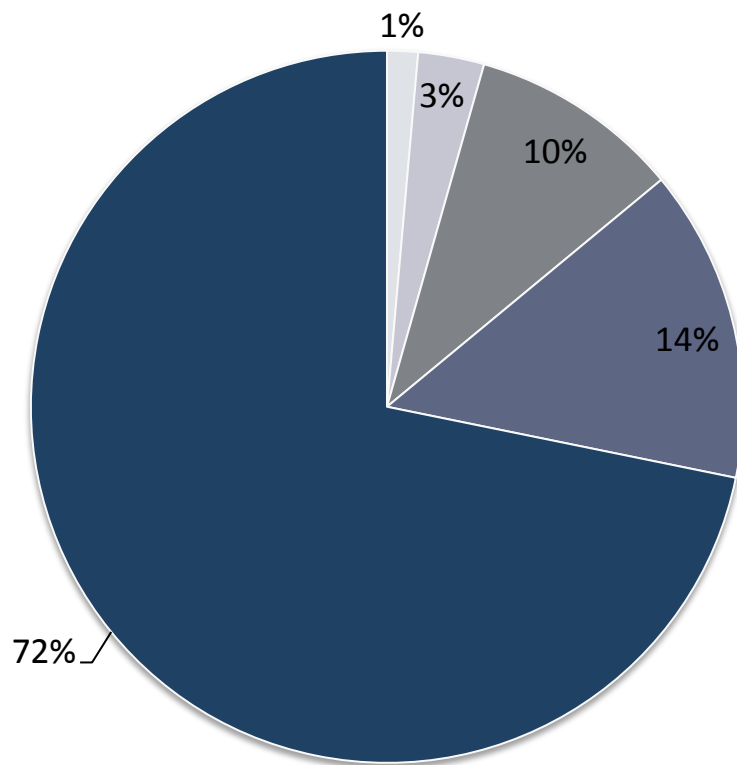
Sample size - 187



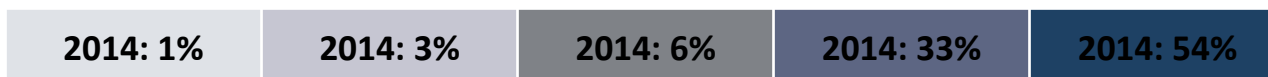
The main reason for the decline in letters sent is that households opted for email, consistent with 2014's survey. The number of respondents who claimed they had no need to send mail increased by 12% since 2014.

Satisfaction with letterbox availability

Satisfaction levels have remained unaltered since 2014, although the number of households claiming to be completely satisfied increased from 54% in 2014 to 72%.



Sample size - 500



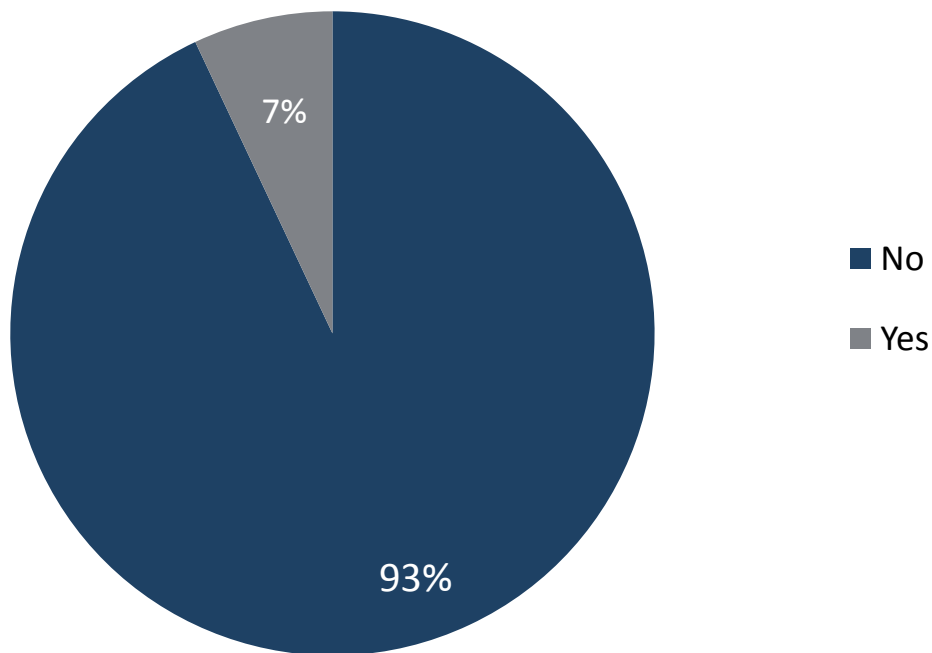
Not at all satisfied



Completely satisfied

Have you sent a letter using other operators besides MaltaPost within the last 12 months?

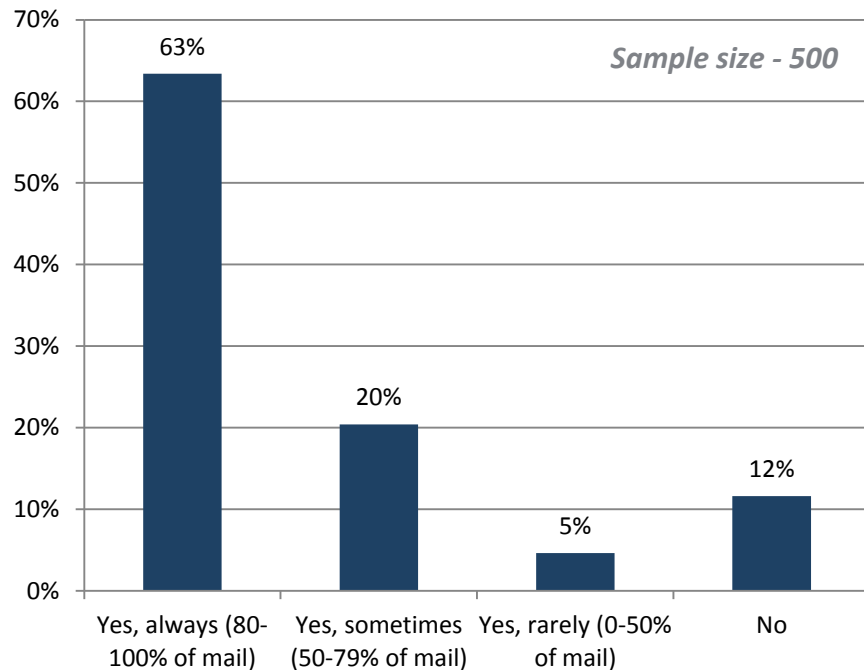
Sample size - 500



Only 7% of respondents claimed to have made use of other operators' services.

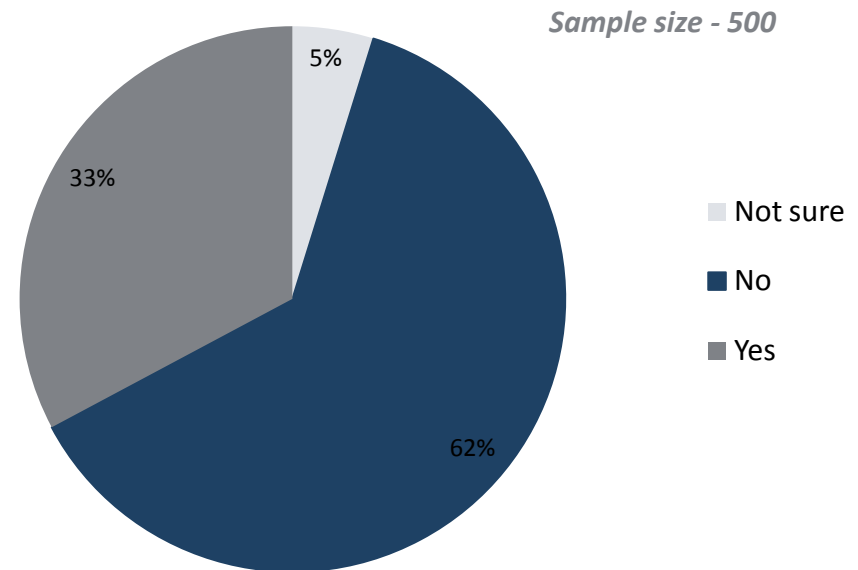
Post-code Use & Awareness

Do you always write the post code when sending a postal article?



The number of respondents who claimed to write the post-code whenever they send mail decreased from 71% in 2014 to 63%.

Are you aware that there is a post-code finder on MaltaPost's website?



Only 1/3 of respondents claimed to be aware of the post-code finder on MaltaPost's website.

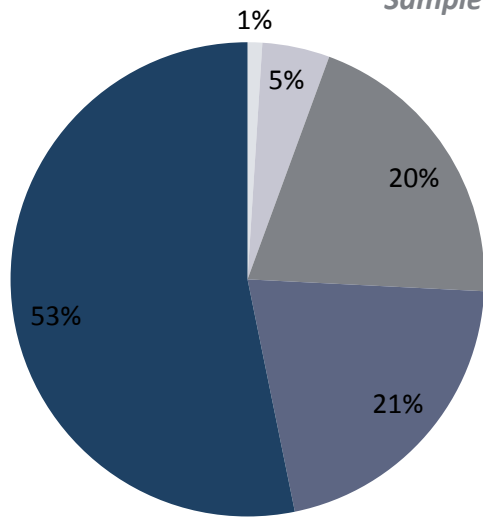


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Price analysis – substitution to non-postal alternatives

How reasonable do you find the price of letter mail (26c)?

Sample size - 500



Not at all satisfied

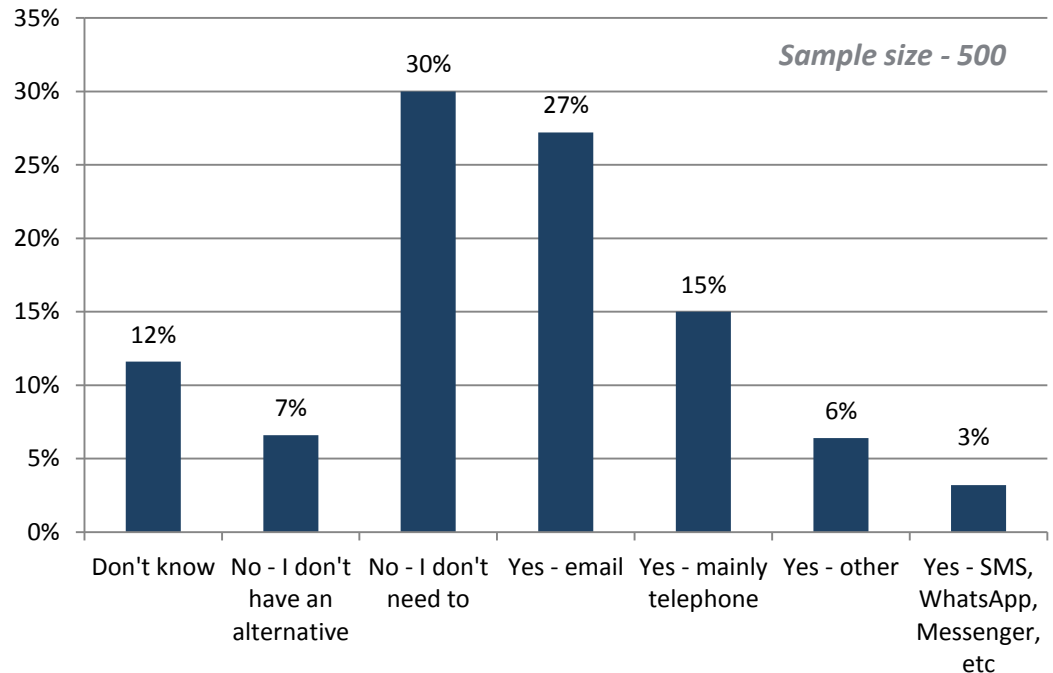


Completely satisfied

74% of respondents consider the price of letter mail to be reasonable.

If the price of a 50g addressed letter were to increase by 5-10% (26c-29c) would you consider switching to non-postal alternatives?

Sample size - 500

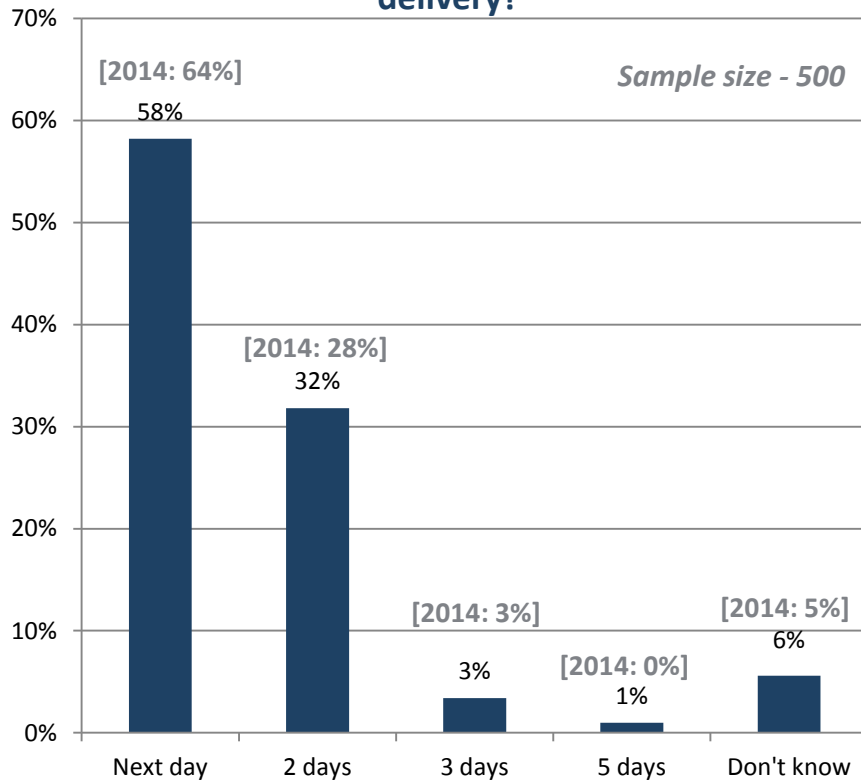


51% of households indicated that they would consider switching to non-postal alternatives should the price of a 50g addressed letter increase by 5-10%. In 2014 this figure stood at 38%.



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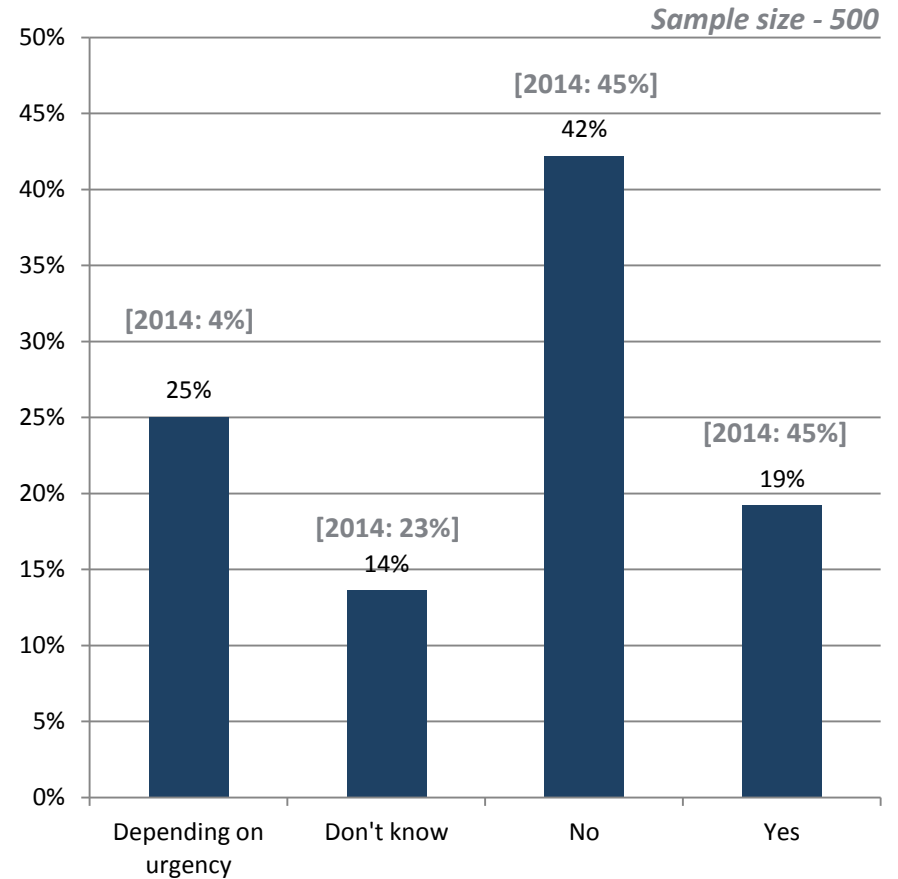
What is an acceptable lead-time (in days) from date of posting a letter to actual delivery?



The number of respondents indicating their preference for next day delivery decreased from 64% in 2014 to 58%. 32% of respondents claimed they would find a 2-day lead-time acceptable, a slight increase over 2014.

Lead-time and deferred delivery

Would you opt for a service which is cheaper/discounted for deferred delivery, whereby your postal article is then delivered after 3 days instead of the next day?



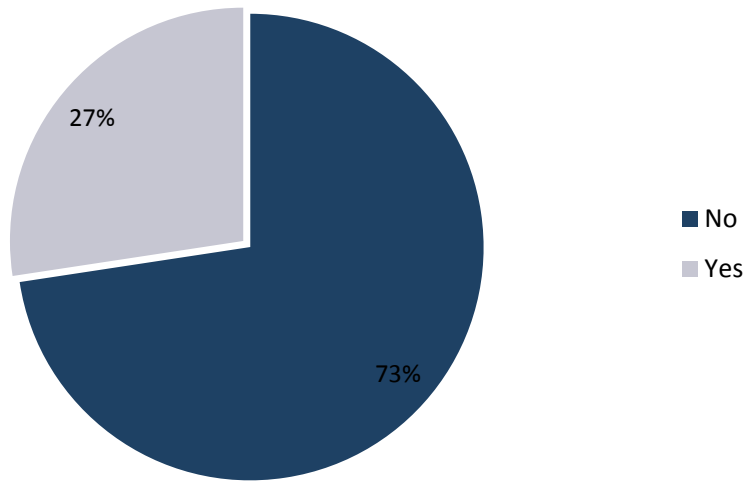
The number of respondents who would opt for a cheaper, deferred delivery depending on the urgency of their postal item increased from 4% in 2014 to 25%.



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Would 5 days a week for the delivery of postal articles by MaltaPost instead of 6 days a week be acceptable?

Sample size - 500

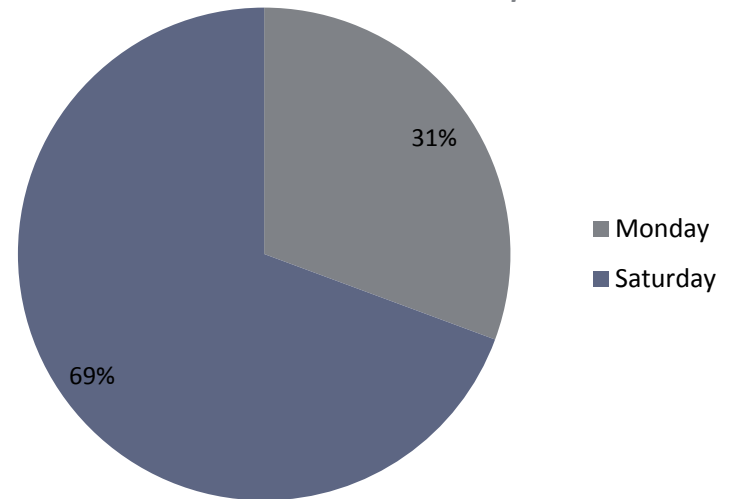


73% of households do not consider a 5-day week to be acceptable.

Acceptability of a 5-day week

Which day of the week would you remove delivery from?

Sample size - 124



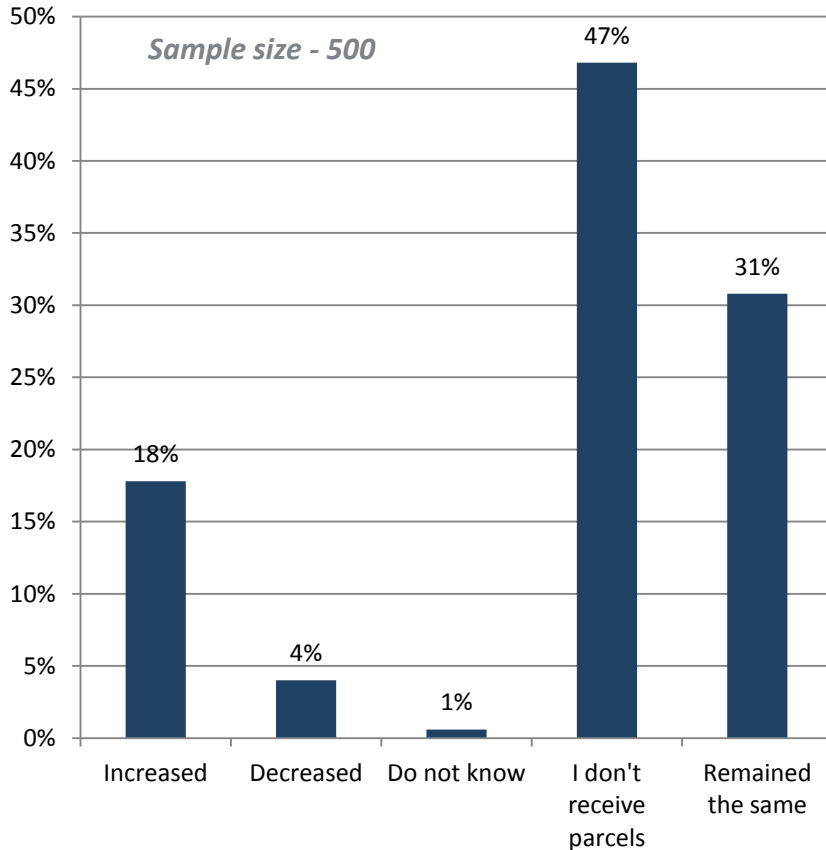
Respondents who felt that a 5-day week would be acceptable further said they would prefer to remove Saturday, with deliveries taking place from Monday through Friday.

Section 2:
Parcels



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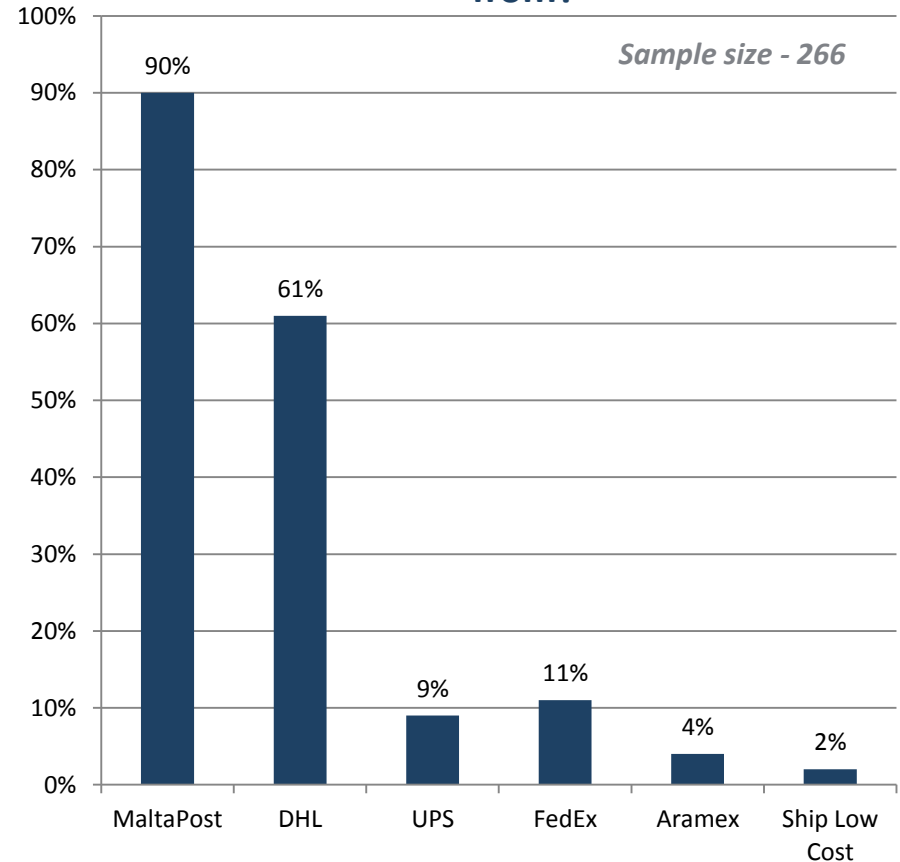
In the last 12 months has the number of parcels you received:



53% of households received parcels in the last 12 months.

Trends: receiving parcels

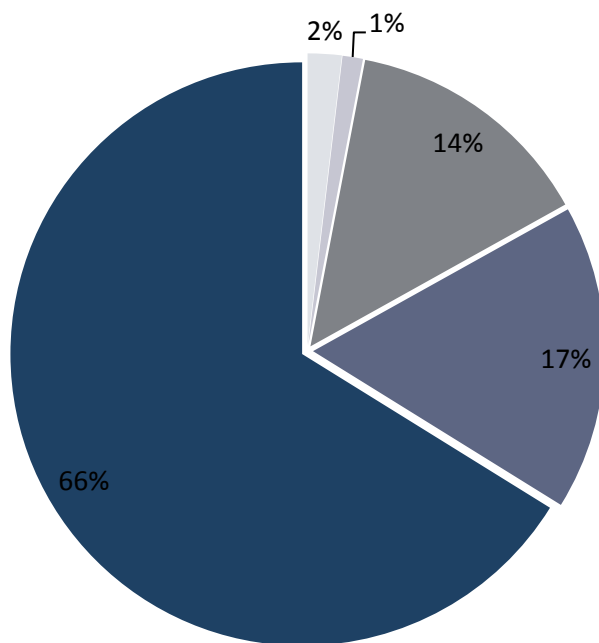
Which operators do you receive parcels from?



The two main operators households received parcels from were MaltaPost and DHL.

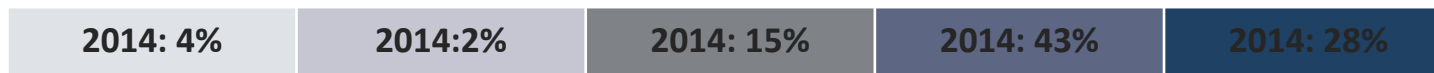
Receiving parcels: Satisfaction with MaltaPost's parcel service

When receiving a parcel how satisfied are you with MaltaPost's parcel service?



Sample size - 266

83% of households are satisfied with MaltaPost's parcel service. In 2014 this figure stood at 71%.



Not at all satisfied

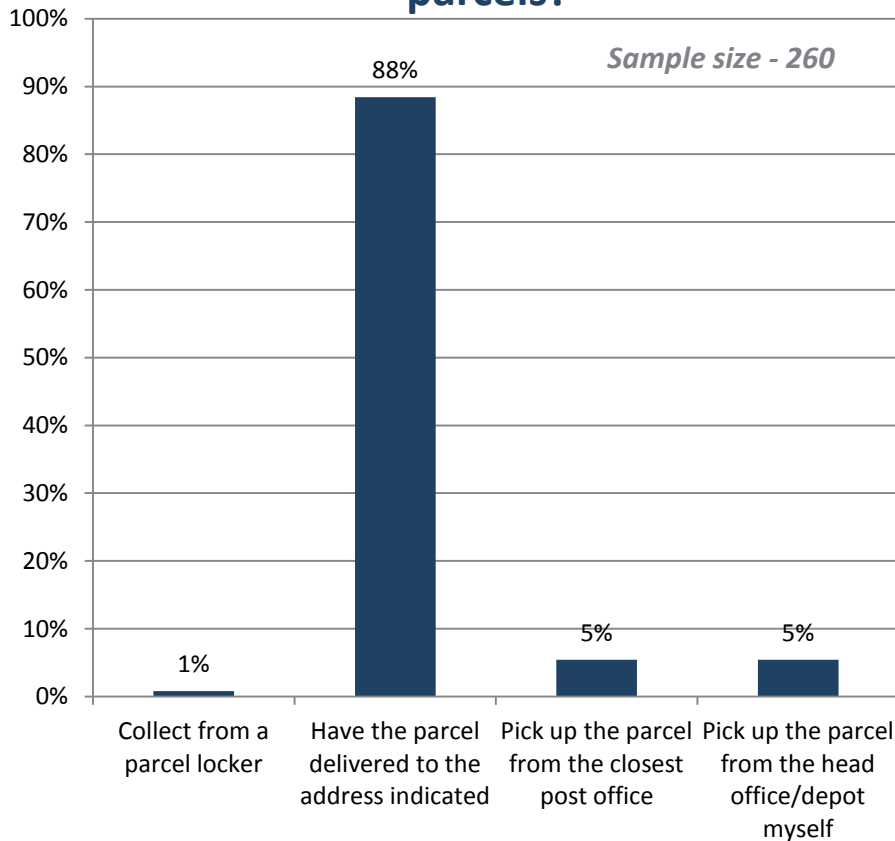


Completely satisfied



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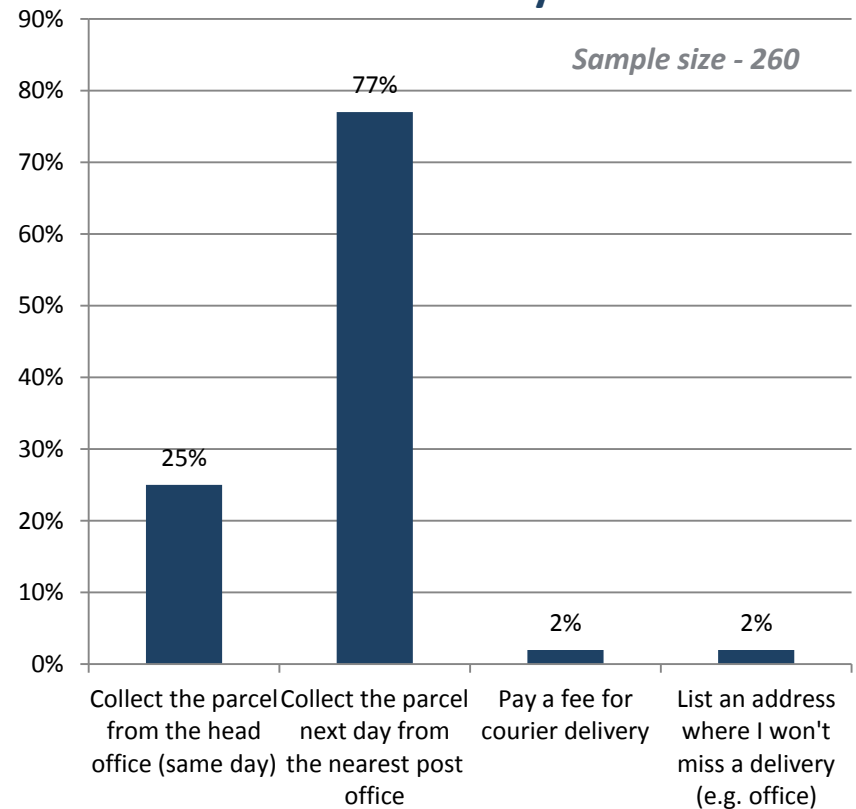
How do you prefer to receive parcels?



88% of households that receive parcels prefer to receive them at the address indicated on the parcel.

Trends: receiving parcels and missed deliveries

What do you do if you miss a delivery?



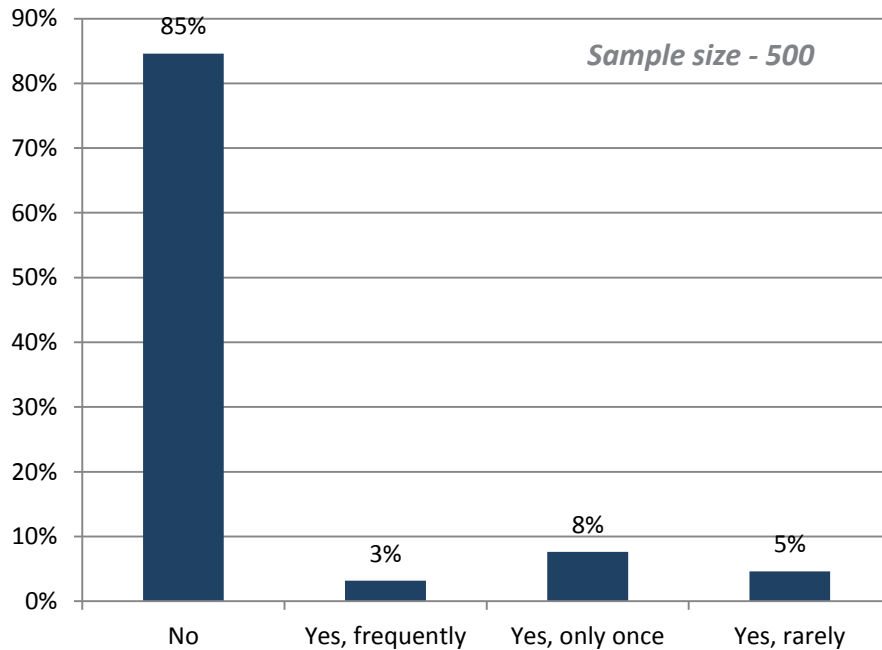
When they miss a delivery 77% of respondents claimed that they would prefer to collect their parcel the next day from the nearest post office.



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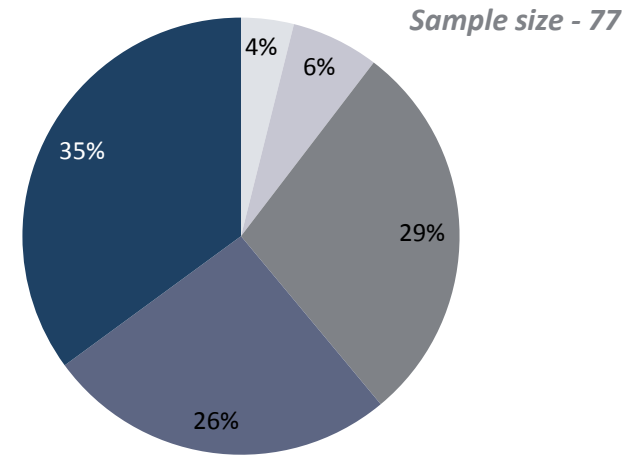
Trends: sending parcels

Have you sent a parcel using MaltaPost's service during the last 12 months?

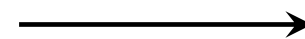


16% of respondents claim to have sent a parcel using MaltaPost's service in the last 12 months.

How reasonable do you find the price of MaltaPost's parcel service?



Not at all satisfied



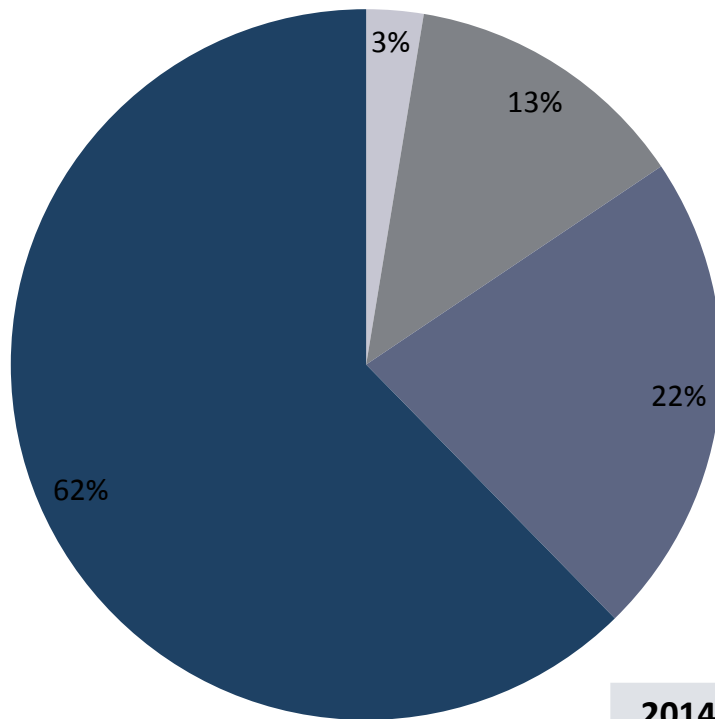
Completely satisfied

61% of respondents perceived the price of MaltaPost's parcel service to be reasonable (30% in 2014).

Satisfaction when sending parcels

How satisfied are you with MaltaPost's parcel service?

Sample size - 77



84% of the households who made use of MaltaPost's parcel service claim to be satisfied (71% in 2014). No total dissatisfaction was registered.

2014: 2%

2014: 4%

2014: 15%

2014: 43%

2014: 28%

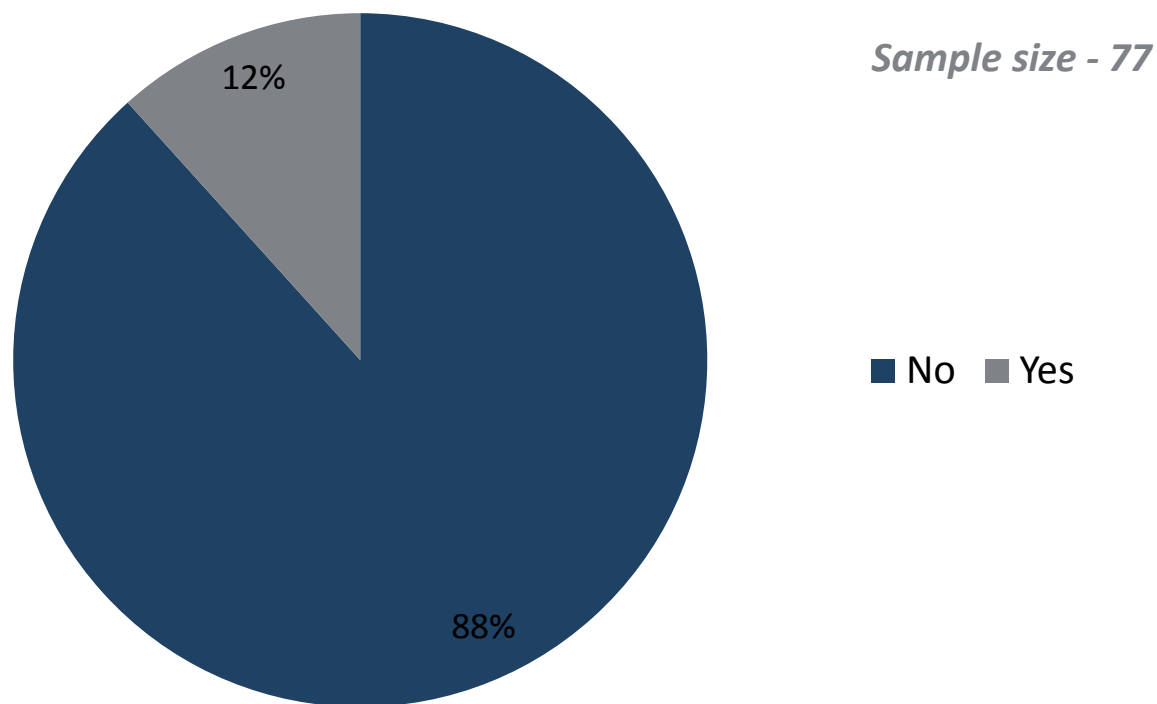
Not at all
satisfied



Completely
satisfied

Trends: sending parcels using other operators apart from MaltaPost

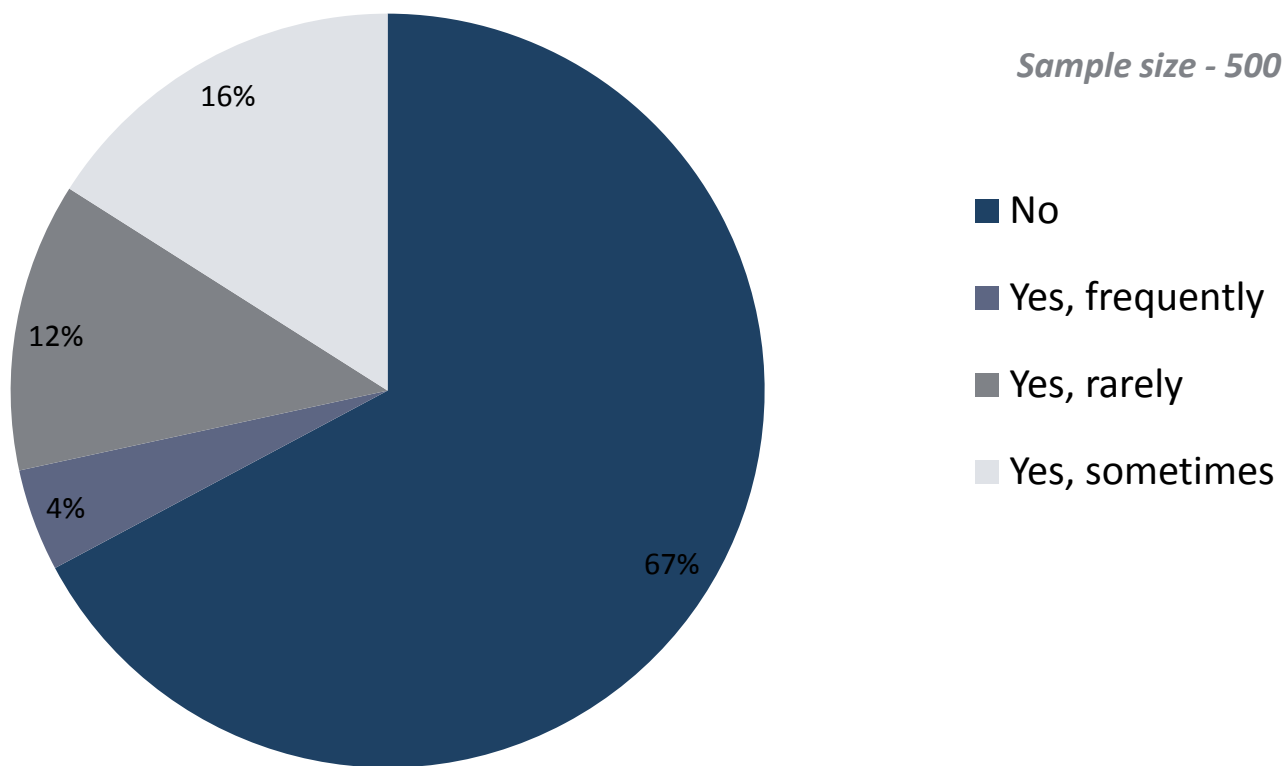
Have you sent a parcel using other operators besides MaltaPost within the last 12 months?



12% of respondents claimed to have sent a parcel using operators other than MaltaPost.

*Section 3:
Registered
Mail*

Have you sent registered mail in the last 12 months?

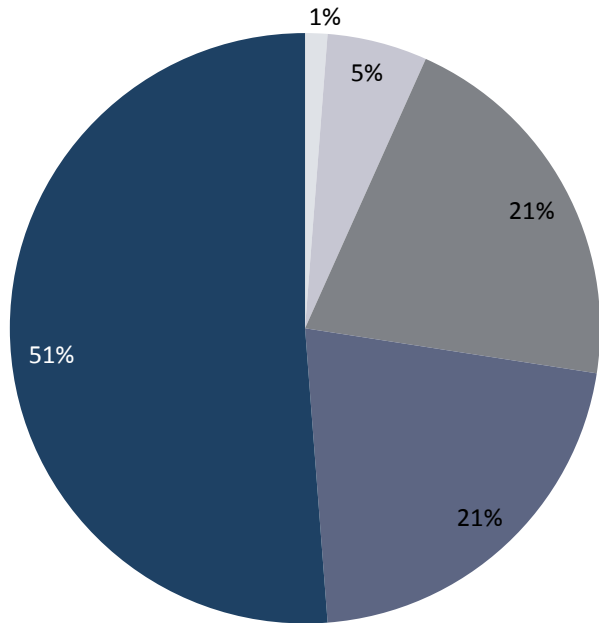


33% of respondents claimed to have sent registered mail over the past 12 months.



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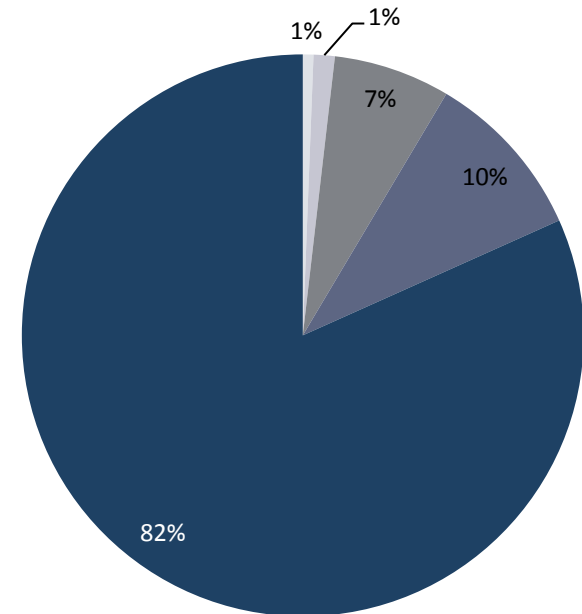
Are you satisfied with the price of registered mail?



Sample size - 164

Registered mail: price and quality

How satisfied are you with the quality of MaltaPost's registered mail service?



72% of respondents perceive the price of registered mail to be reasonable (56% in 2014).

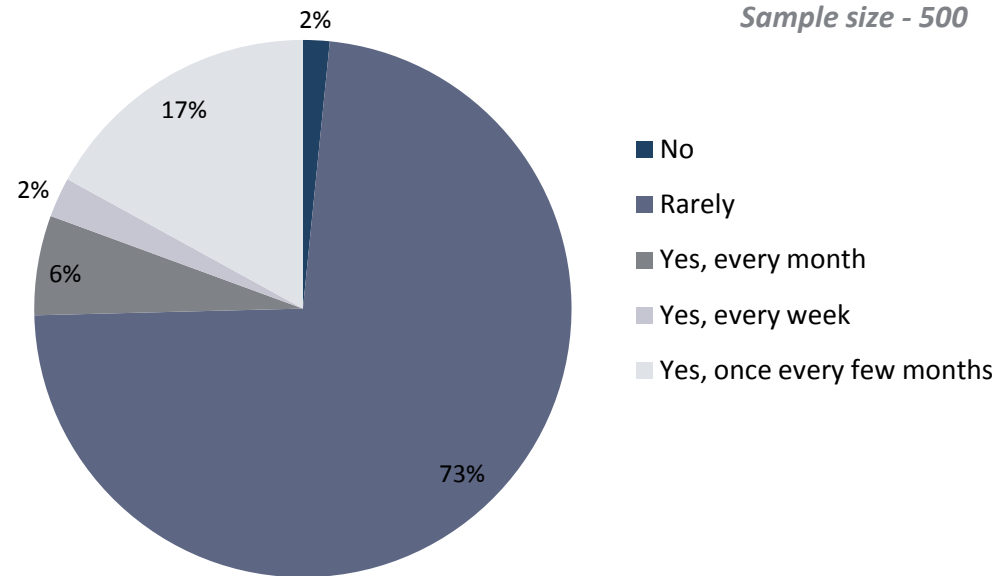
92% of respondents claim to be satisfied with the quality of MaltaPost's registered mail service (86% in 2014).

*Section 4:
MaltaPost's
Services*

Trends: MaltaPost's website

Have you used MaltaPost's website in the last 12 months?

Sample size - 500



98% of respondents claimed to have made use of MaltaPost's website in the last 12 months (20% in 2014).

The majority of users visited the website rarely.

Sample size - 492

Reason for using MaltaPost website

Searching for nearby letterbox / post office	9%
Searching for information about MP products	5%
Searching for postcodes	12%
Tracking parcels	9%
Searching for prices of postal services	4%
Tracking postal articles	2%

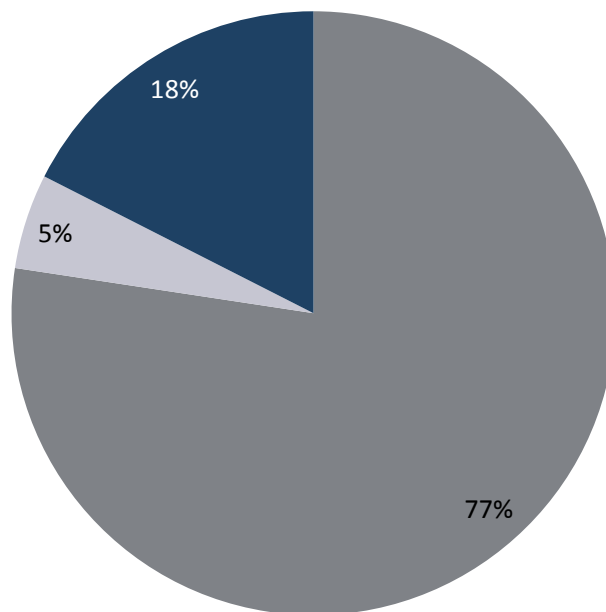
Searching for post-codes was the main reason for using MaltaPost's website.



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Satisfaction with MaltaPost's website

How satisfied are you with MaltaPost's website?



Sample size - 492

Neither satisfied nor unsatisfied

Satisfied

Very Satisfied

23% of respondents who visited MaltaPost's website claimed to be satisfied. 77% expressed neutral views. No negative views were expressed.

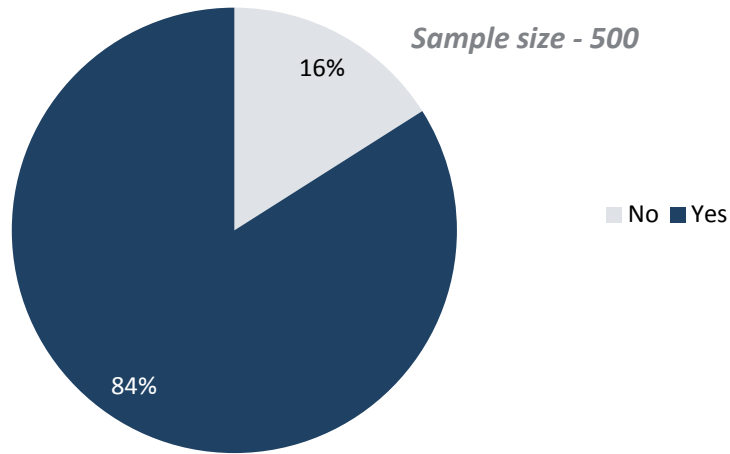
In 2014, when only 20% of respondents claimed to have made use of MaltaPost's website, only 13% claimed to be satisfied with the website.



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Trends: post offices

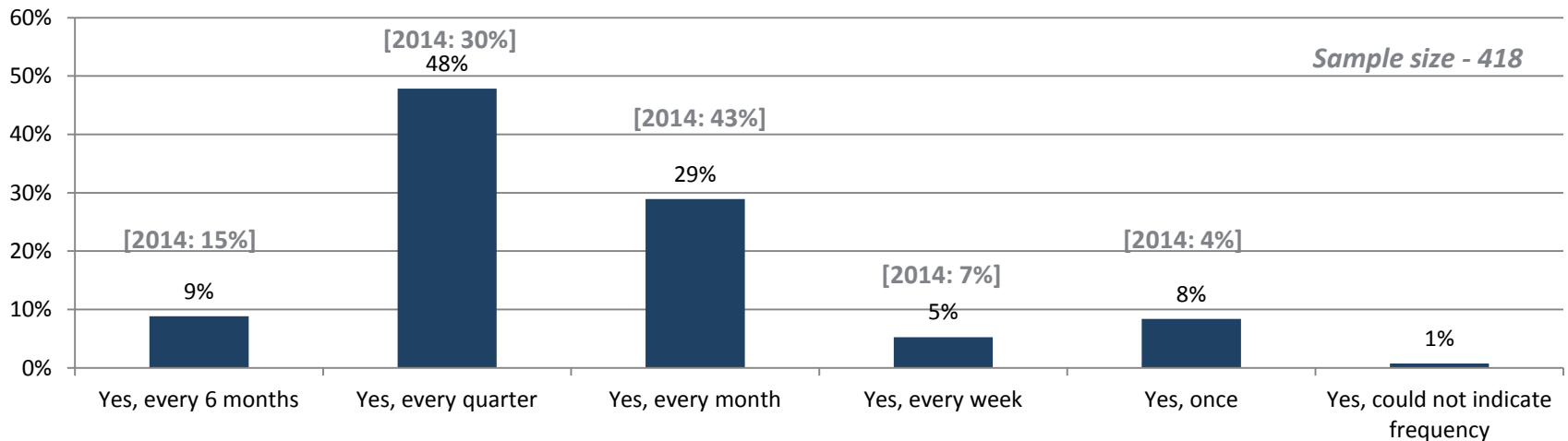
Have you been to the post office in the last 12 months?



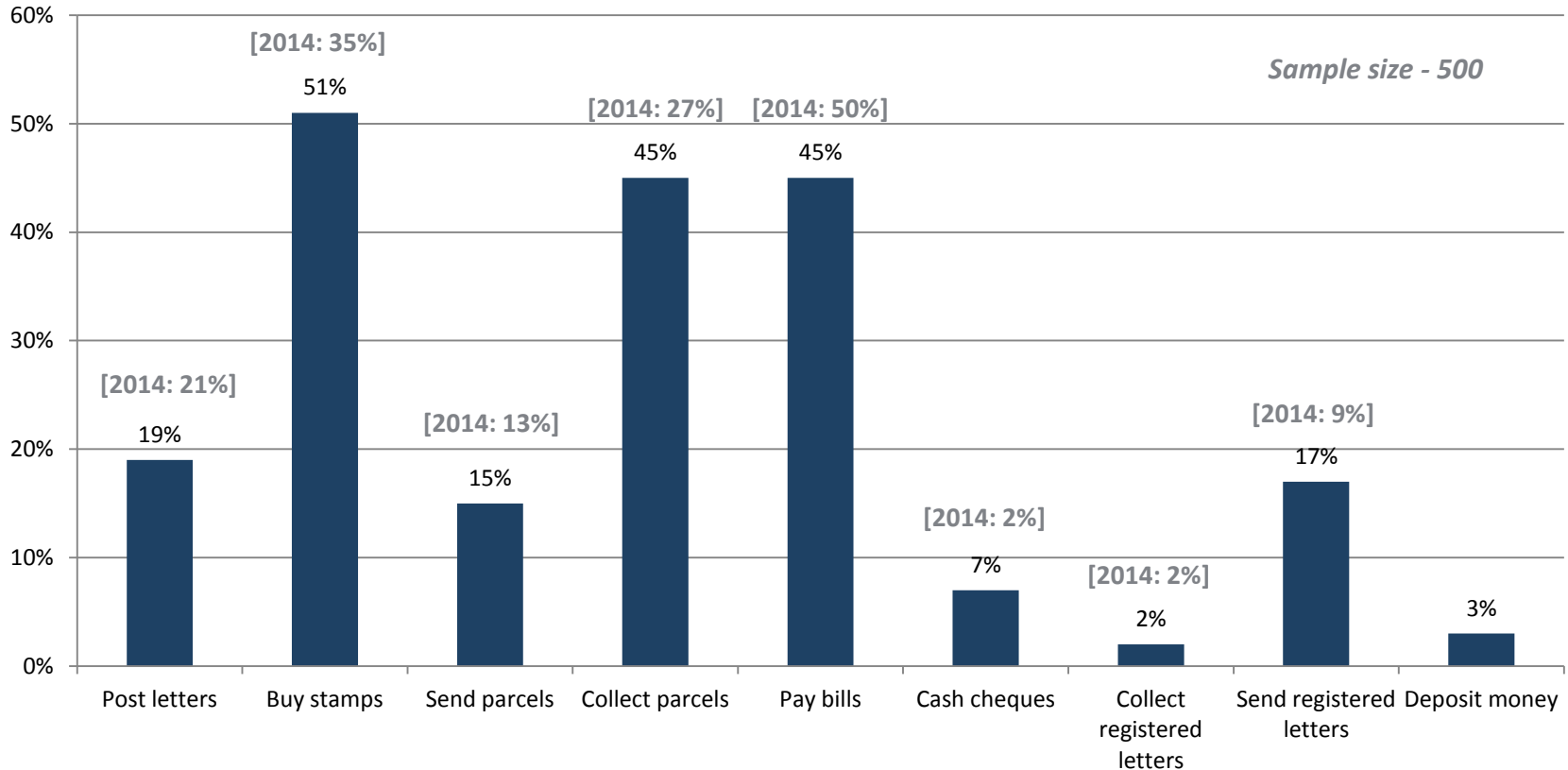
84% of households claim to have visited a post office in the last 12 months. In 2014 this figure stood at 70%.

Several respondents cited queues as the reason for not visiting the post office.

How often did you visit the post office in the last 12 months?



Why did you visit the post office?



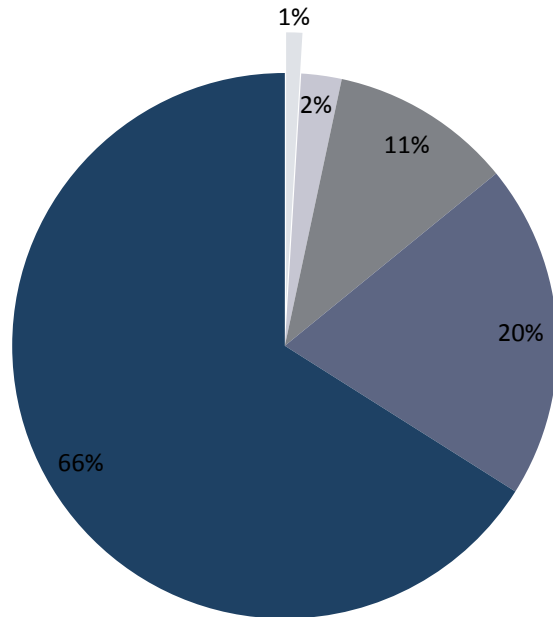
Respondents claimed that they visit the post office to buy stamps (51%) and to collect parcels and pay bills (both 45%). The purchase of stamps and collection of parcels both saw substantial increases since 2014.



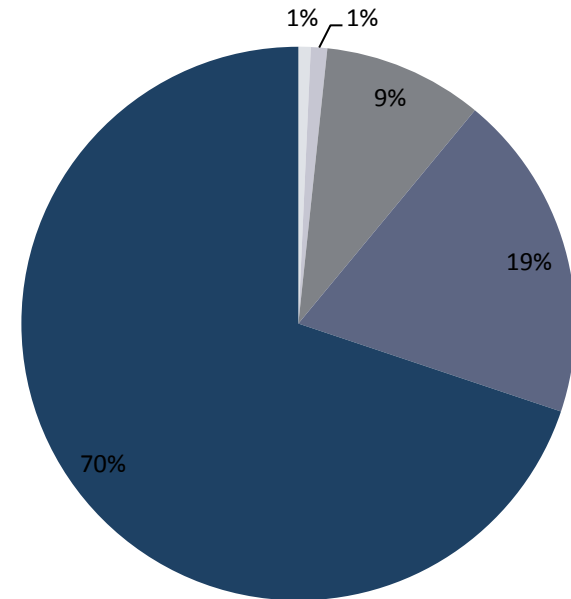
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Post offices: opening hours and availability

How satisfied are you with the post office opening hours?



How satisfied are you with the availability of the post office?



Sample size - 418



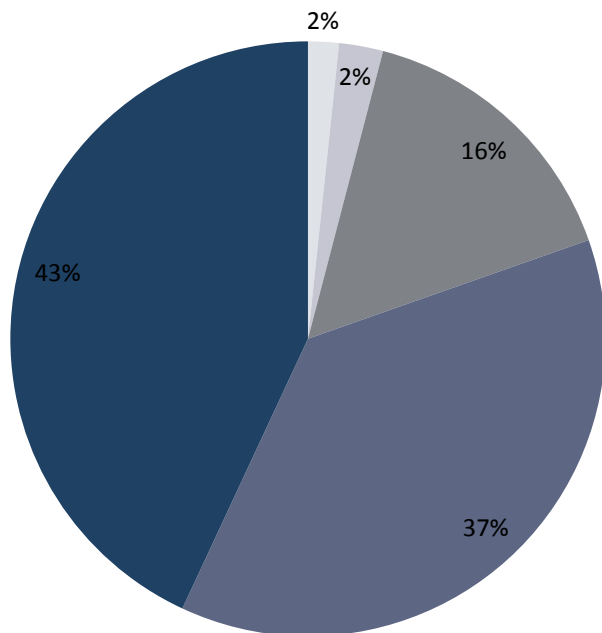
86% of respondents are satisfied with the post offices' opening hours (71% in 2014).
89% of respondents are satisfied with the availability of their post office (63% in 2014).



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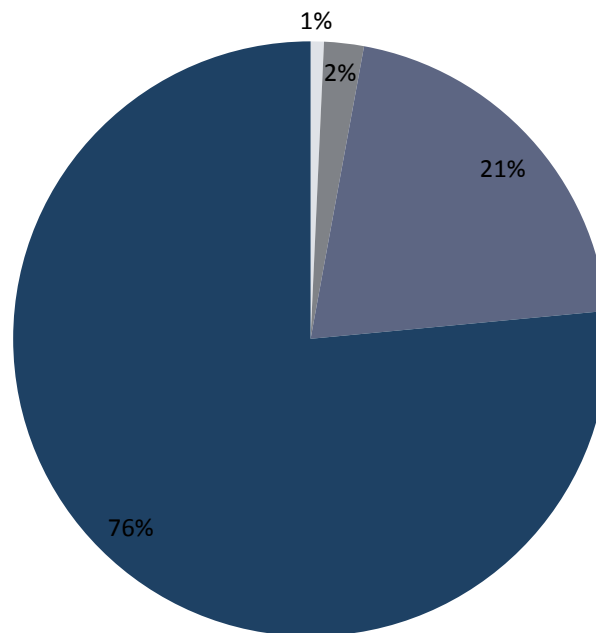
Post offices: waiting time and services

How satisfied are you with the waiting time?



Satisfaction with services / facilities provided by the post office

Sample size - 418



Not at all satisfied



Completely satisfied

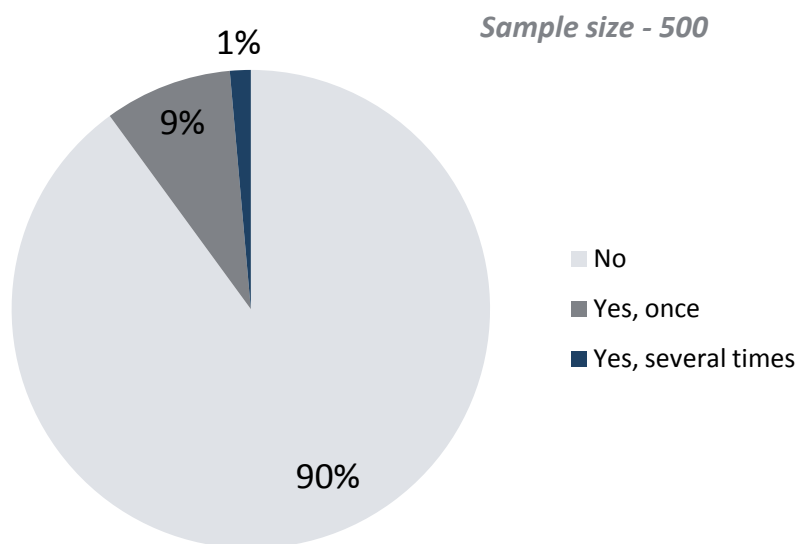
80% of respondents are satisfied with the waiting time at MaltaPost's post offices (57% in 2014).

97% of respondents are satisfied with the services/facilities offered by post offices (87% in 2014).



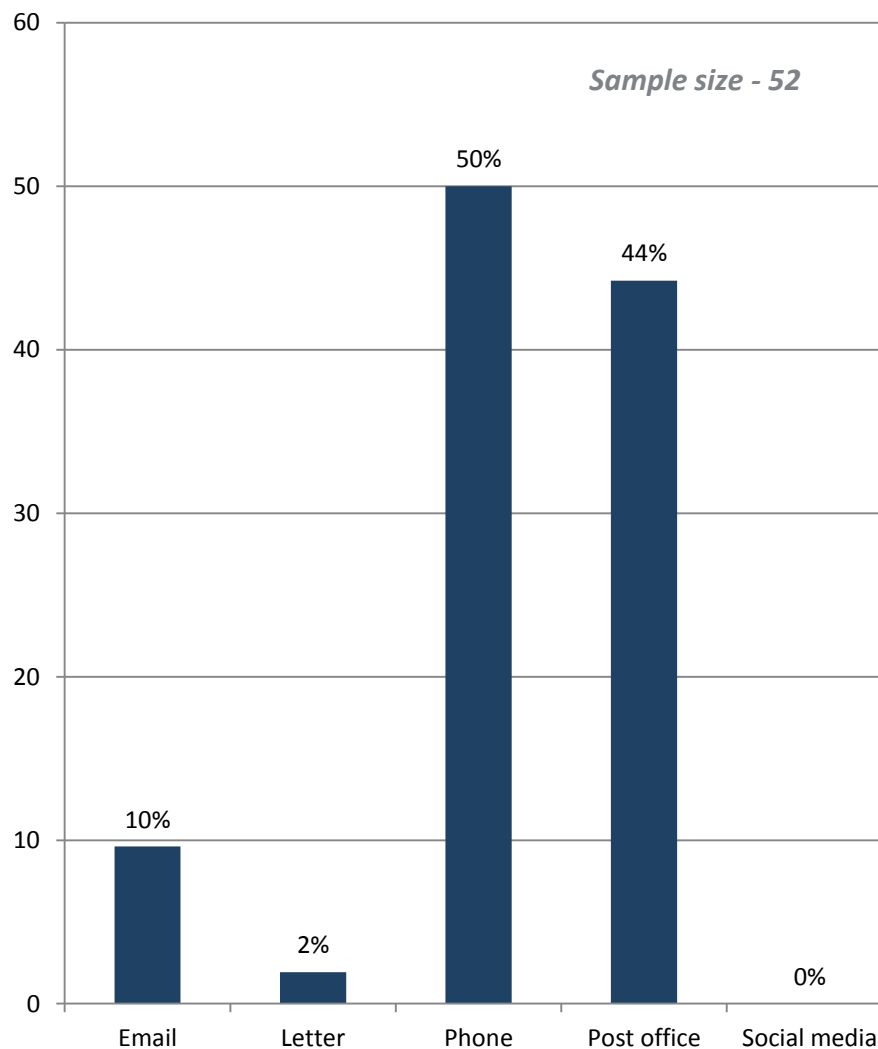
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Have you or a family member made a complaint to MaltaPost within the last 12 months?



10% of respondents made a complaint in the last 12 months, similar to 2014 figures. The majority of respondents voiced their complaint by phone or through the post office. No respondents claimed to have used social media to file a complaint.

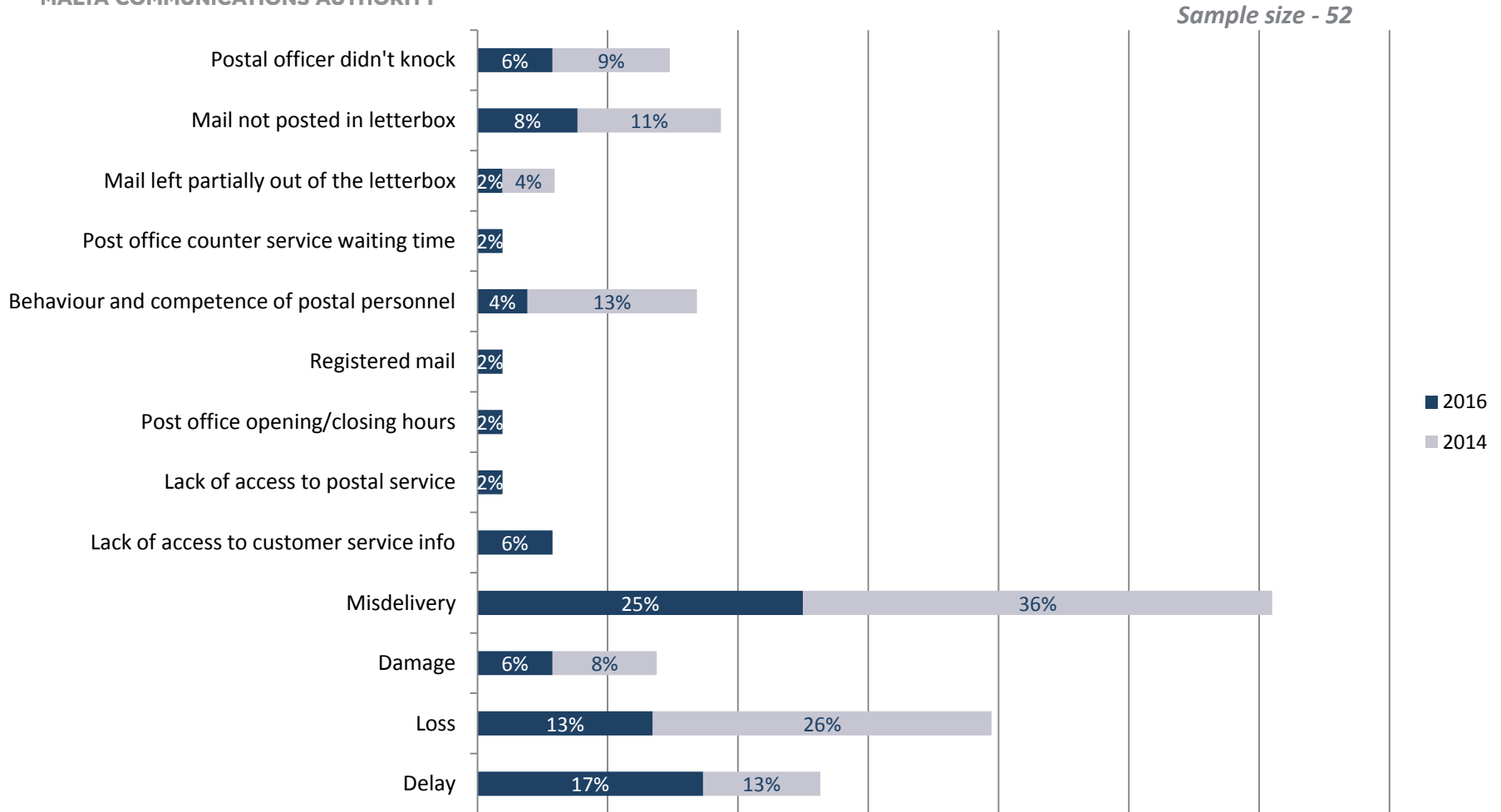
How did you get in touch with MaltaPost?





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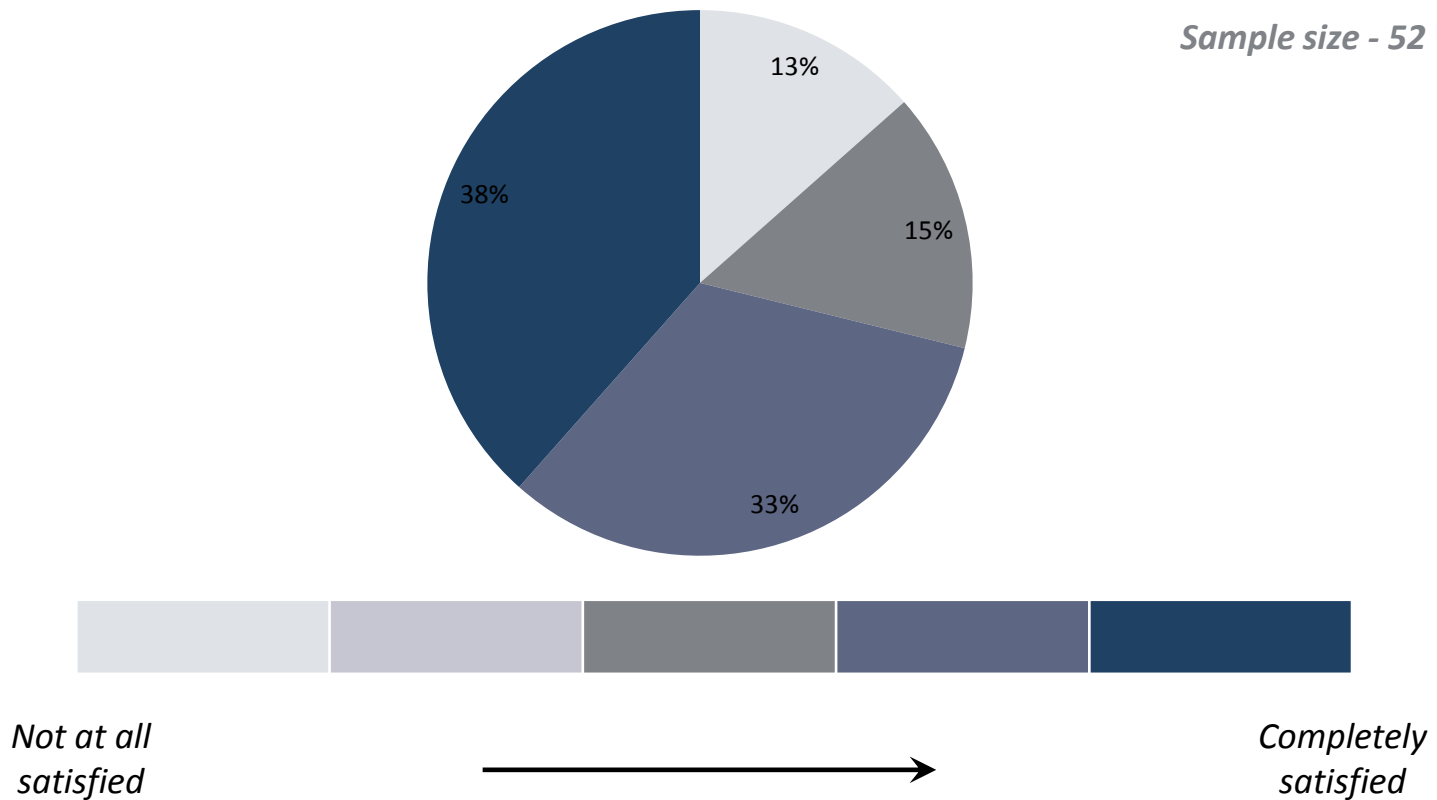
Reasons for Complaints



The most common complaints related to misdelivery (25%), followed by delay (17%). All types of complaints have decreased since 2014 except for delay.

How satisfied were you with the way your complaint was handled?

Sample size - 52

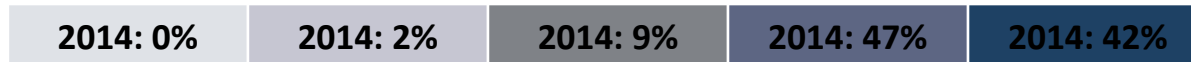
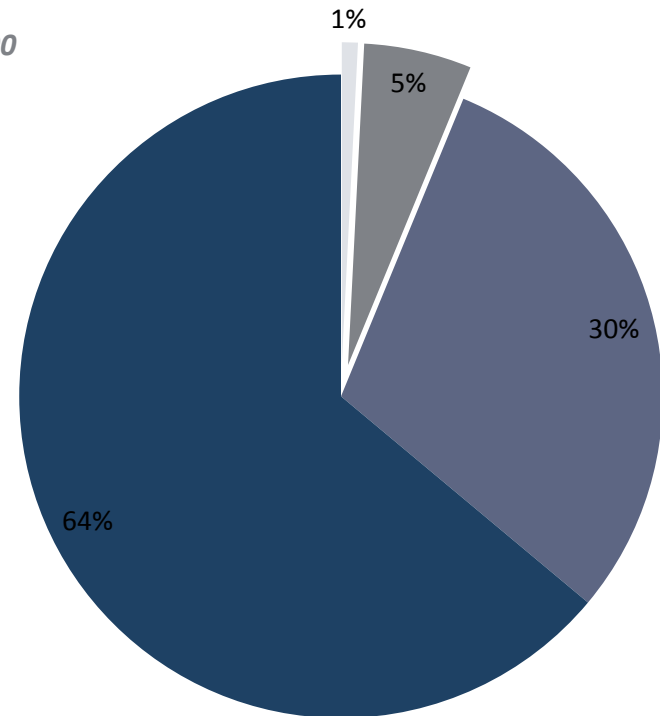


Among respondents who placed a complaint with MaltaPost, 71% were satisfied with how their complaint was handled (28% in 2014).

In your experience what do you think of the overall quality of postal services provided by Malta Post?

Sample size - 500

94% of respondents claimed that they were satisfied with the overall quality of MaltaPost's postal services (89% in 2014).



Not at all satisfied



Completely satisfied

- The majority of respondents (58%) claimed that the number of **letters received** in the last 12 months has remained the same (67% in 2014).
- The amount of households indicating a **decrease in received letters** grew from 22% in 2014 to 32%. The majority of received letters are **bills/statements**.
- The majority of respondents (56%) claimed that the number of **letters sent** in the last 12 months remained the same (53% in 2014).
- The majority of respondents (56%) claimed that the number of **letters sent** in the last 12 months neither increased nor decreased (53% in 2014). Letter mail was mainly used for **personal communication** (67%), followed by **bill payments** (23%).
- As in 2014 the most frequently-used **alternative** to sending letters is **email** (49%).

- 63% of respondents claimed that they always write the **post-code** when sending a postal article. Nevertheless only 33% of the respondents claimed to be aware of the **post-code finder** on MaltaPost's website.
- 74% of respondents claim to find the **price of letter mail (26c)** reasonable.
- When asked about a **letter's lead-time**, fewer respondents opted for **next day (58%)** when compared to 2014 (64%).
- The number of respondents who would, depending on urgency, opt for a **cheaper/deferred delivery (D+3)** rose from 4% in 2014 to 25%.
- 73% of respondents do not find a **5-day delivery** system to be acceptable.



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Main Highlights: Parcels & Registered Mail

- 83% of respondents claim to be satisfied with **MaltaPost's service**, both when they **sent and received parcels** within the last 12 months.
- 88% of households that **receive parcels** prefer to receive them at the address indicated on the parcel. There was little but equal preference (5%) for **self-collection** from post/head offices.
- 77% of respondents prefer to **collect their parcel from the nearest post office** the next day after a **missed delivery** whereas 25% prefer to visit the **head office on the same day**.
- 61% of respondents who claim to have sent a parcel using MaltaPost's service within the last 12 months deem the **price of this service to be reasonable** (30% in 2014).
- 12% of respondents claimed to have **sent a parcel using operators** other than MaltaPost during the last 12 months.
- Of the respondents who claimed to have sent **registered mail** within the last 12 months, 72% claimed that the **price of registered** mail is reasonable. 92% of respondents who sent registered mail claim to be **satisfied** with the service.

Main Highlights: MaltaPost's services

- 98% of respondents claimed to have made use of **MaltaPost's website** within the last 12 months. In 2014 this figure stood at 20%. There are no heavy users of the website, with most users visiting the website rarely.
- 84% of respondents have **visited a post office** in the last 12 months; the majority of respondents go to the post office every quarter.
- The majority of respondents visit the post office mainly to **buy stamps (51%), collect parcels (45%)** and **pay bills (45%)**. The number of respondents who visit the post office to collect parcels has increased significantly since 2014 (27%).
- Similar to 2014 10% of respondents claimed to have made a **formal complaint** about MaltaPost's services within the last 12 months. Although the main reason for complaint was **misdelivery (25%)** this has decreased since 2014 (36%).
- When asked about the **overall quality** of MaltaPost's postal services, 94% of respondents claimed to be satisfied (89% in 2014).



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Thank you

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