

MCA Market Research

Postal Services – Household Survey Results

Malta Communications Authority
December 2011

Presentation Structure

1. Purpose and methodology
2. Household postal services in Malta
3. Post office services
4. Consumer satisfaction with MaltaPost's services

1. Purpose & Methodology

Purpose

- To assess the extent of **Household Consumer Satisfaction** with the services provided by the Universal Service Provider (USP) - **MaltaPost**
- To monitor a number of postal service aspects, namely price levels, quality, access and complaints handling
- To provide the Authority with an indication on how consumer needs are changing over time and what market trends are developing
- To serve as an additional source of information for regulatory decisions

M. Fsadni & Associates carried out the survey in November 2011 on behalf of the MCA

Fieldwork

Interviews were carried out by telephone using CATI, lasting around 10 minutes.

The survey respondents were chosen at random from GO's and Melita's Internet Telephone Directories.

Only one person per household was interviewed and all respondents were older than 18 years.

Sample

Sample size was proportionally distributed across the 9 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 one responsible for mail and other postal articles in that household.

Responses

515 net respondents

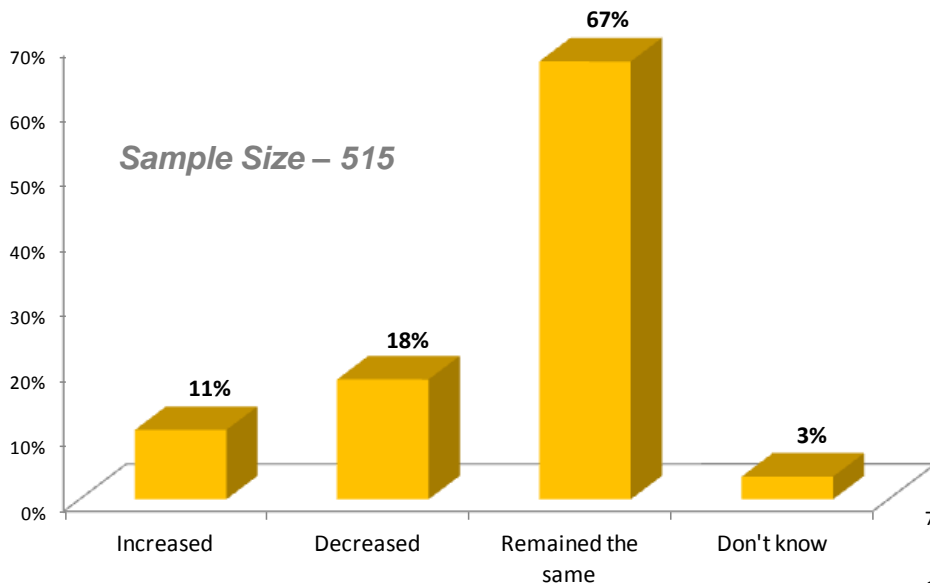
Any refusals / incomplete surveys were re-allocated to achieve a net sample of at least 500 interviewees.

Margin of error: +/- 4.38% at 95% confidence interval.

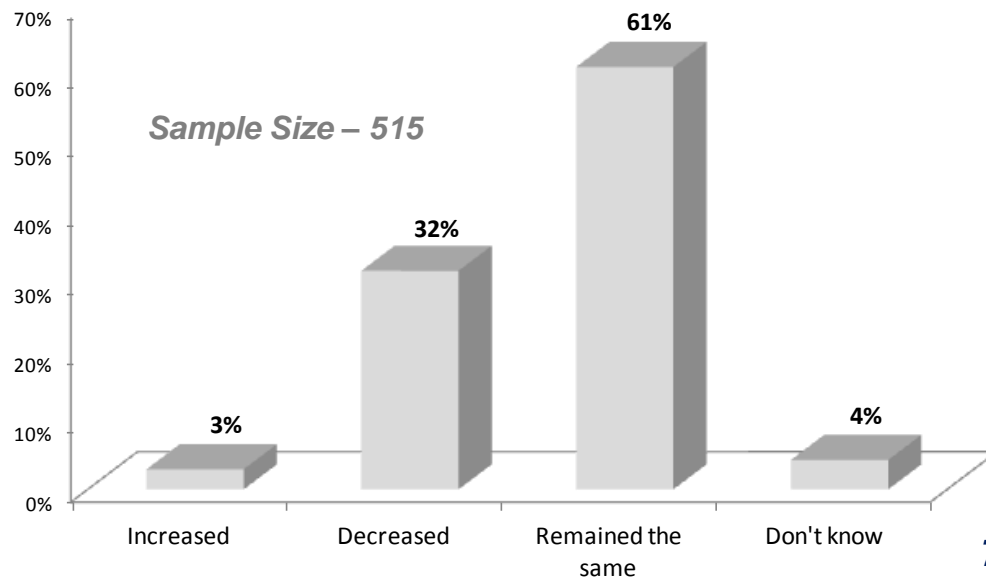
2. Household Postal Services in Malta

Activity of Postal Services in the Maltese Households (1)

*Did the number of addressed letters **received** each week increase, decrease, or remain the same over the past twelve months?*

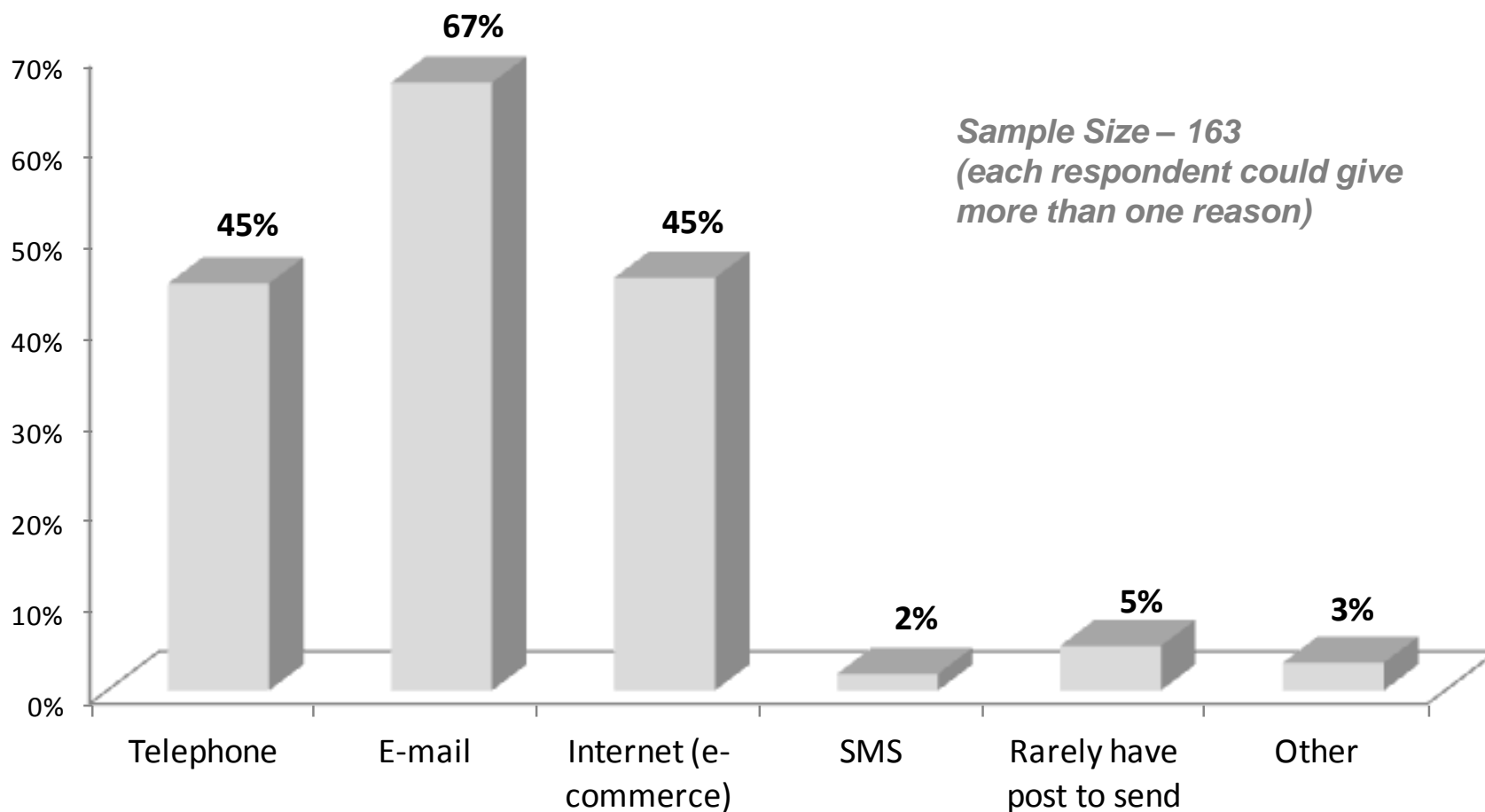


*Did the number of addressed letters **sent** each week increase, decrease, or remain the same over the past twelve months?*



Activity of Postal Services in the Maltese Households (2)

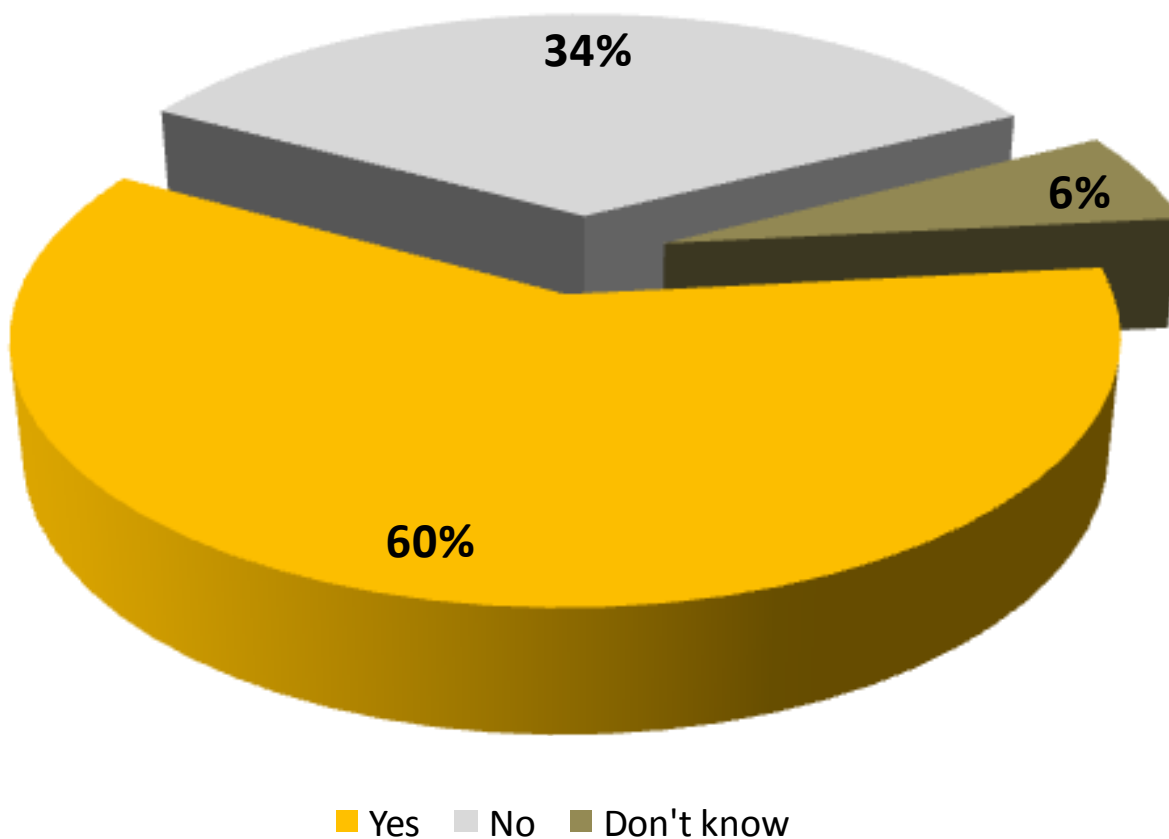
If there was a decrease in the number of addressed letters sent, what are the main reasons?



Delivery of Registered Mail

Is a member of the family normally present when MaltaPost delivers registered mail?

Sample Size – 372



Mornings are the preferred time during the day to receive registered letters, with 45% of respondents say it is the most convenient for their household.

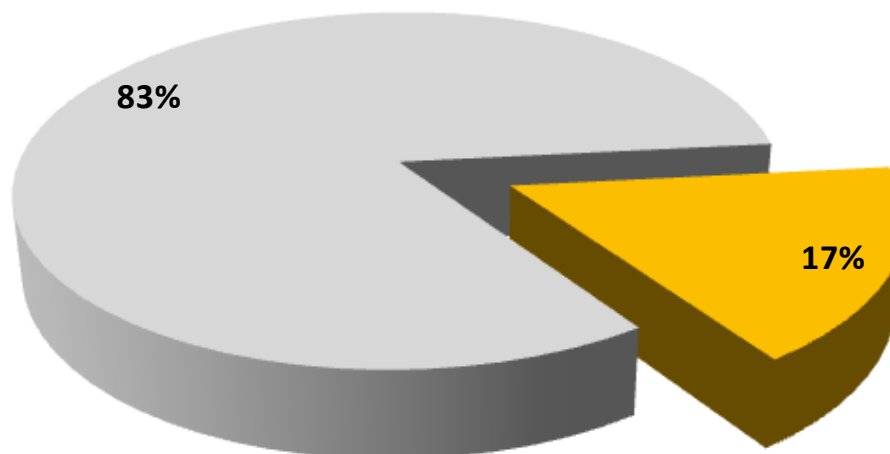
14% of respondents prefer the afternoon, 8% prefer evenings while 5% say Saturdays are most convenient.

The remaining 28% of respondents say they have no particular day or time in which they prefer to receive registered letters.

Delivery of Registered Mail – Traffic fines

Are you aware that traffic fines (e.g. Issued by local wardens) are also delivered by another operator, apart from MaltaPost?

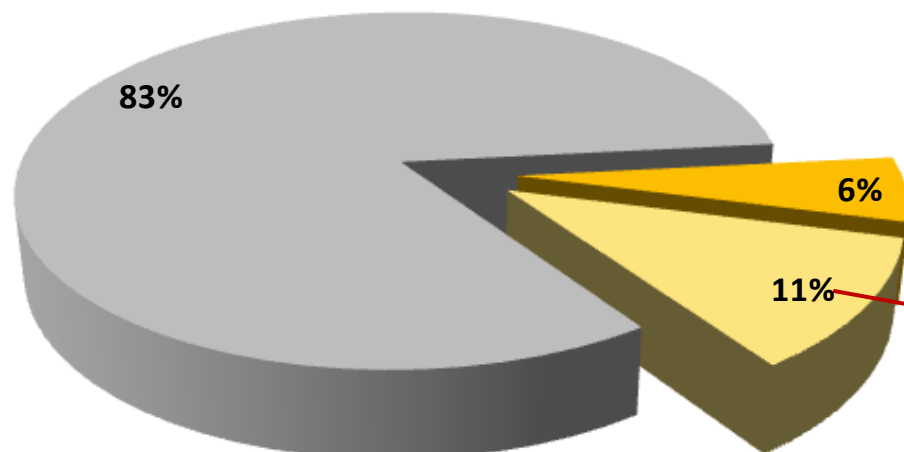
Sample Size – 515



■ Yes ■ No

If you are aware of this fact, do you know the name of the operator?

Sample Size – 88



The majority say they are delivered by police officers

■ Yes, Premiere Post ■ Yes ■ No

Delivery of Parcels

Have you received any parcels during the last 12 months?

Sample Size – 515

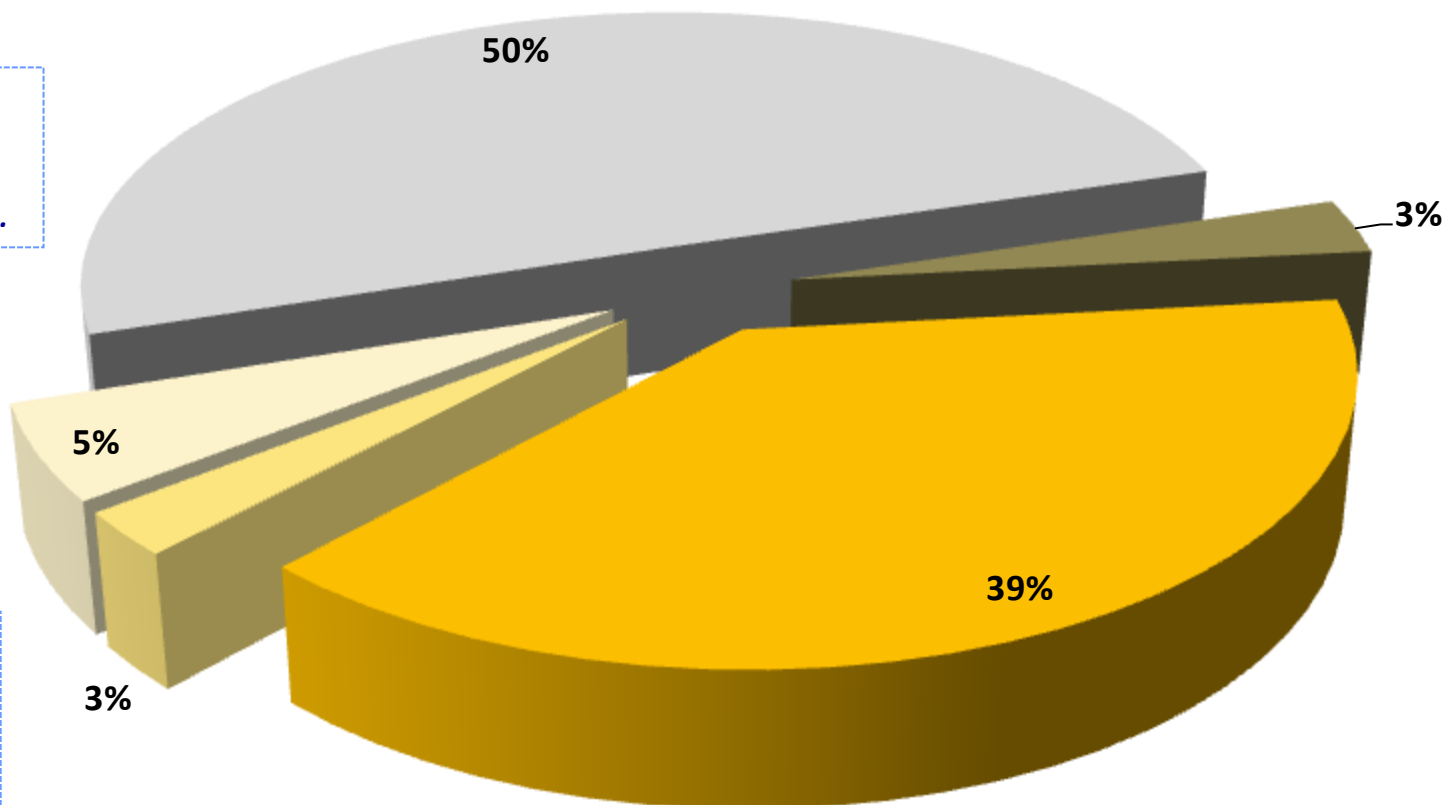
47% of households say they received a parcel during the last 12 months.



8% of households say the parcel was delivered by an operator; other than MaltaPost.



Of this 8%, more than half confirm it was delivered by DHL, while 10% say it was delivered by UPS. Another 10% say their parcel was delivered by FedEx.

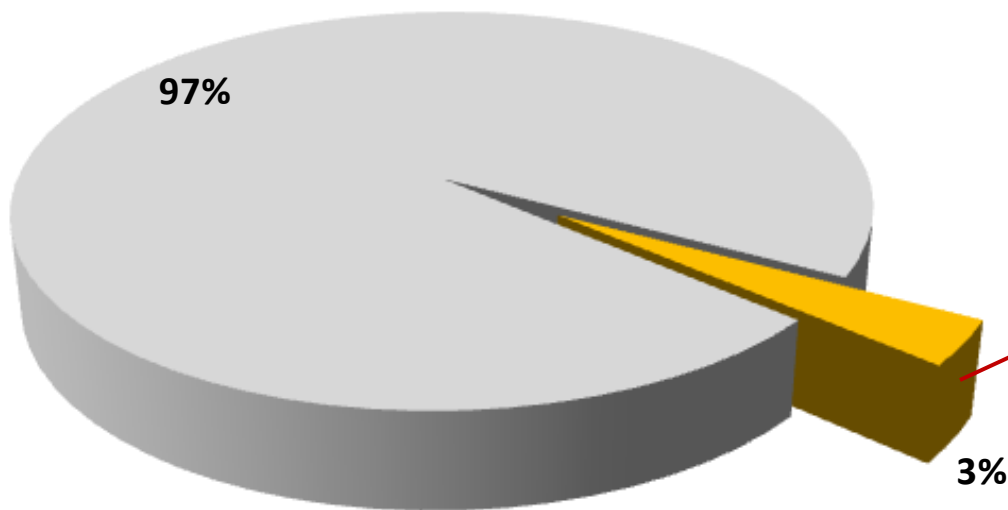


- Yes, from MaltaPost
- Yes, from another operator
- Yes, from both MaltaPost and other operators
- No
- Don't know

Alternative Postal Operators

Have you used other providers besides MaltaPost to send postal articles?

Sample Size – 515



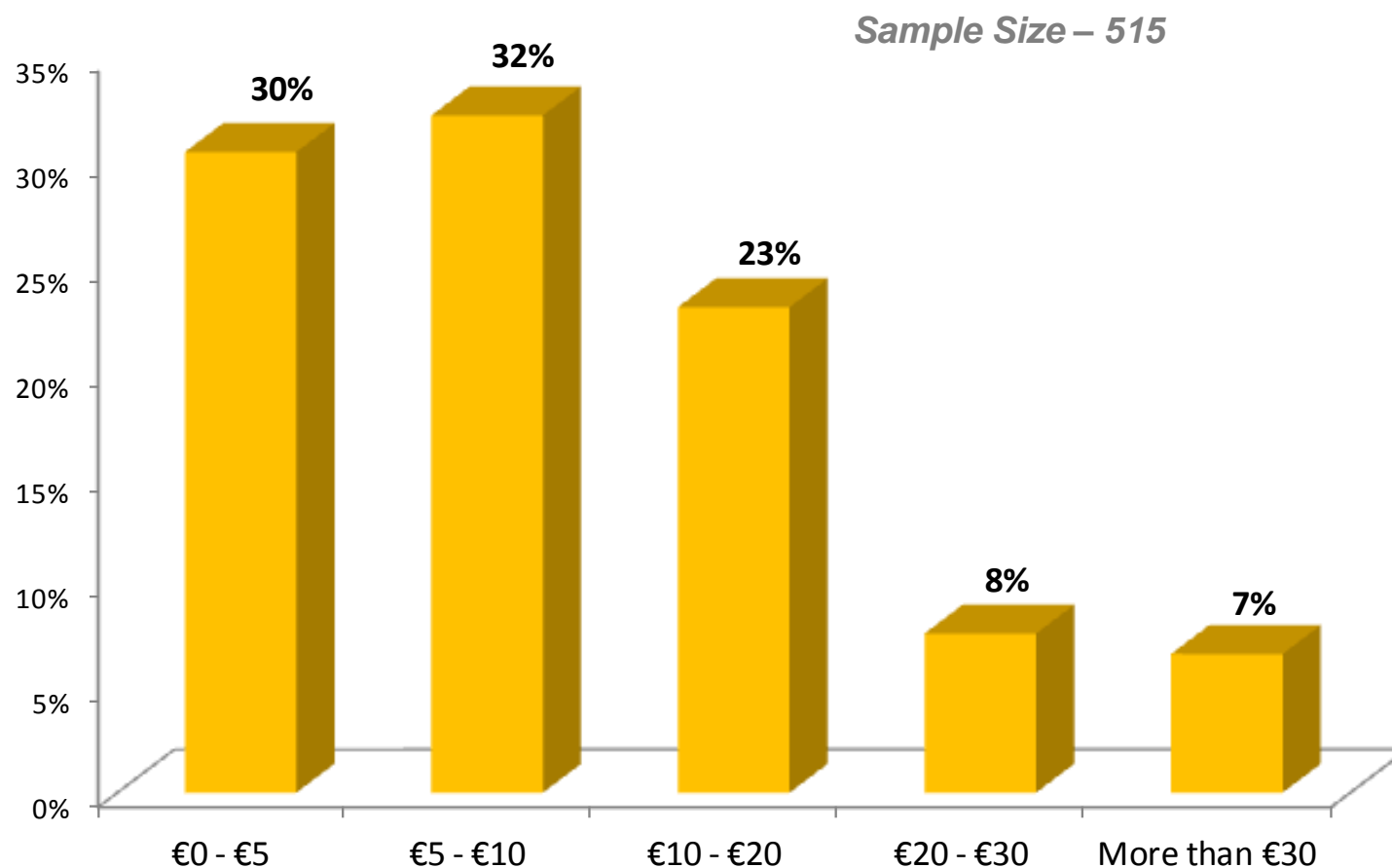
Circa ¾ of the 3% households said they used DHL to send postal articles

■ Yes ■ No

<i>Reasons stated for using other operators' services</i>	<i>% of Households who used alternative postal operators</i>
More reliable	17%
Cheaper	6%
Faster	50%
More secure	22%
Other Reasons	28%

Household Expenditure on Postal Articles

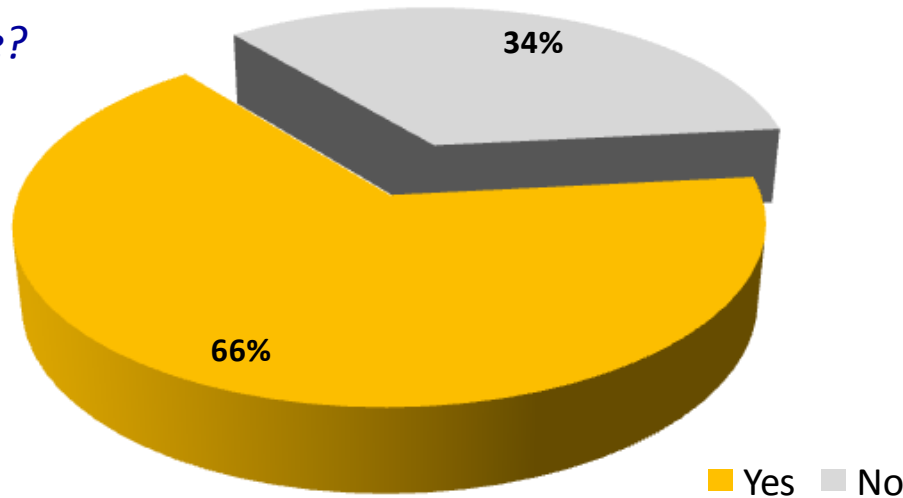
What is the average amount of money spent by your household on postal articles during the past twelve (12) months?



Household Awareness on Current Post-code Format & Letterbox Specifications (1)

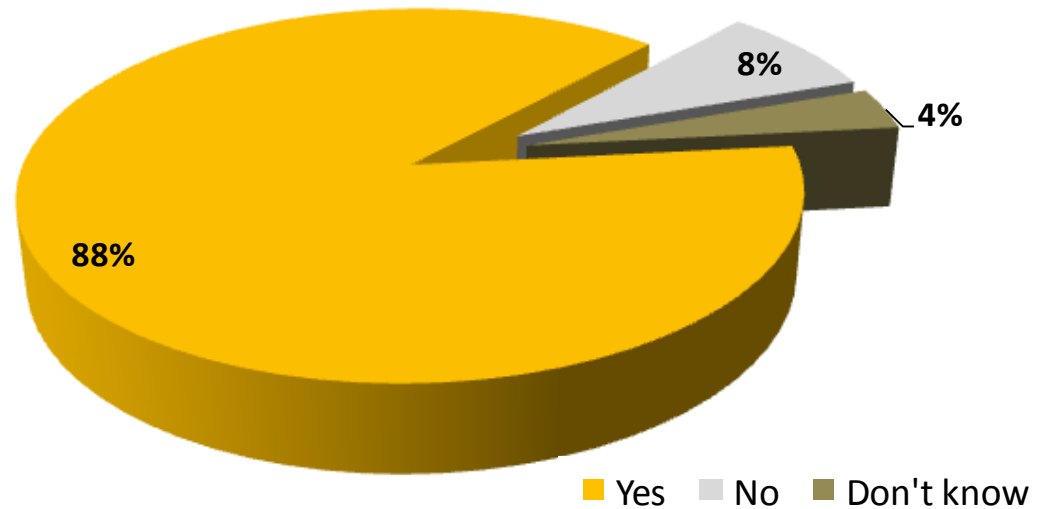
Do you know your current post-code?

Sample Size – 515



Do you think that your letterbox is directly accessible to the postman /postwoman?

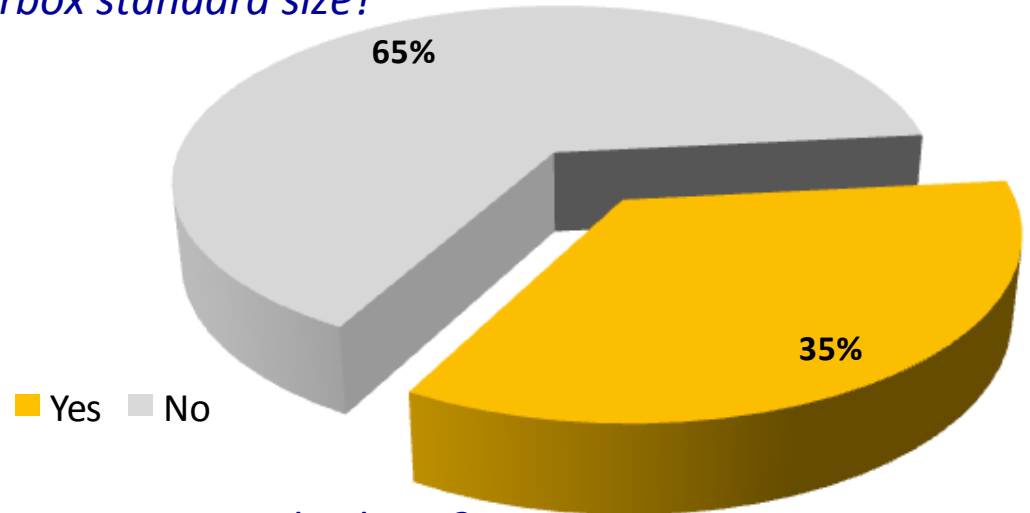
Sample Size – 515



Household Awareness on Current Post-code Format & Letterbox Specifications (2)

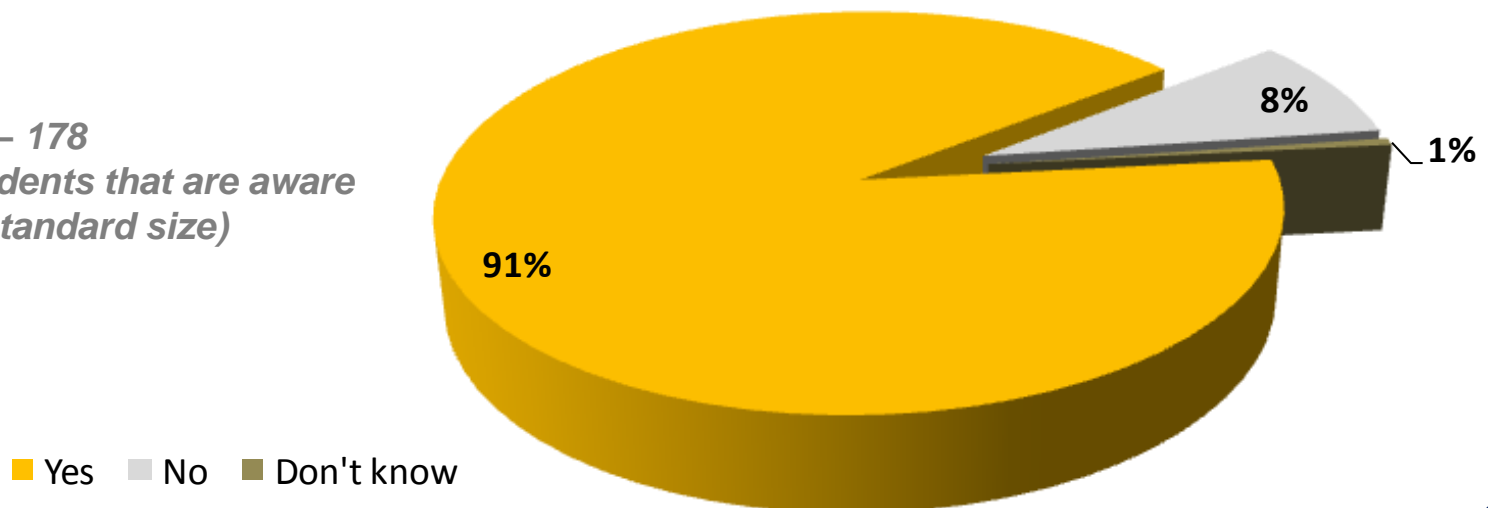
Are you aware of the appropriate letterbox standard size?

Sample Size – 515



Does your letterbox conform to the appropriate standard size?

Sample Size – 178
(Only respondents that are aware of letterbox standard size)



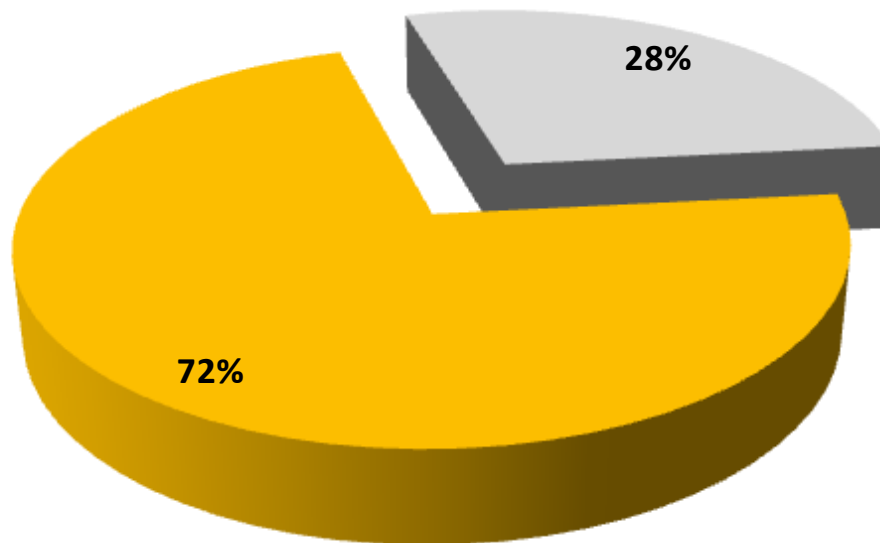
3. Post Office Services

Post Office Activity (1)

Have you been to the Post Office to use a service during the last twelve months?

Sample Size – 515

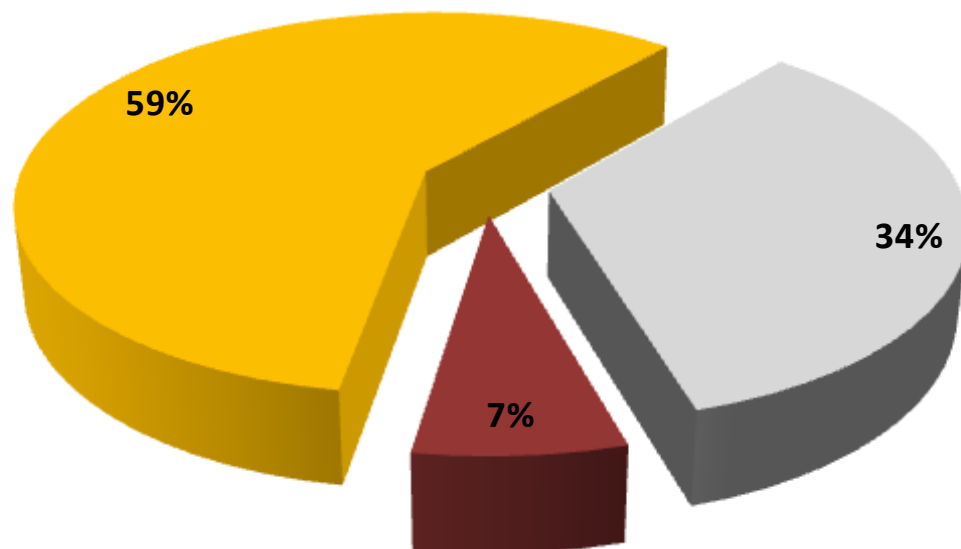
Yes No



Was it a ...

Sample Size – 372

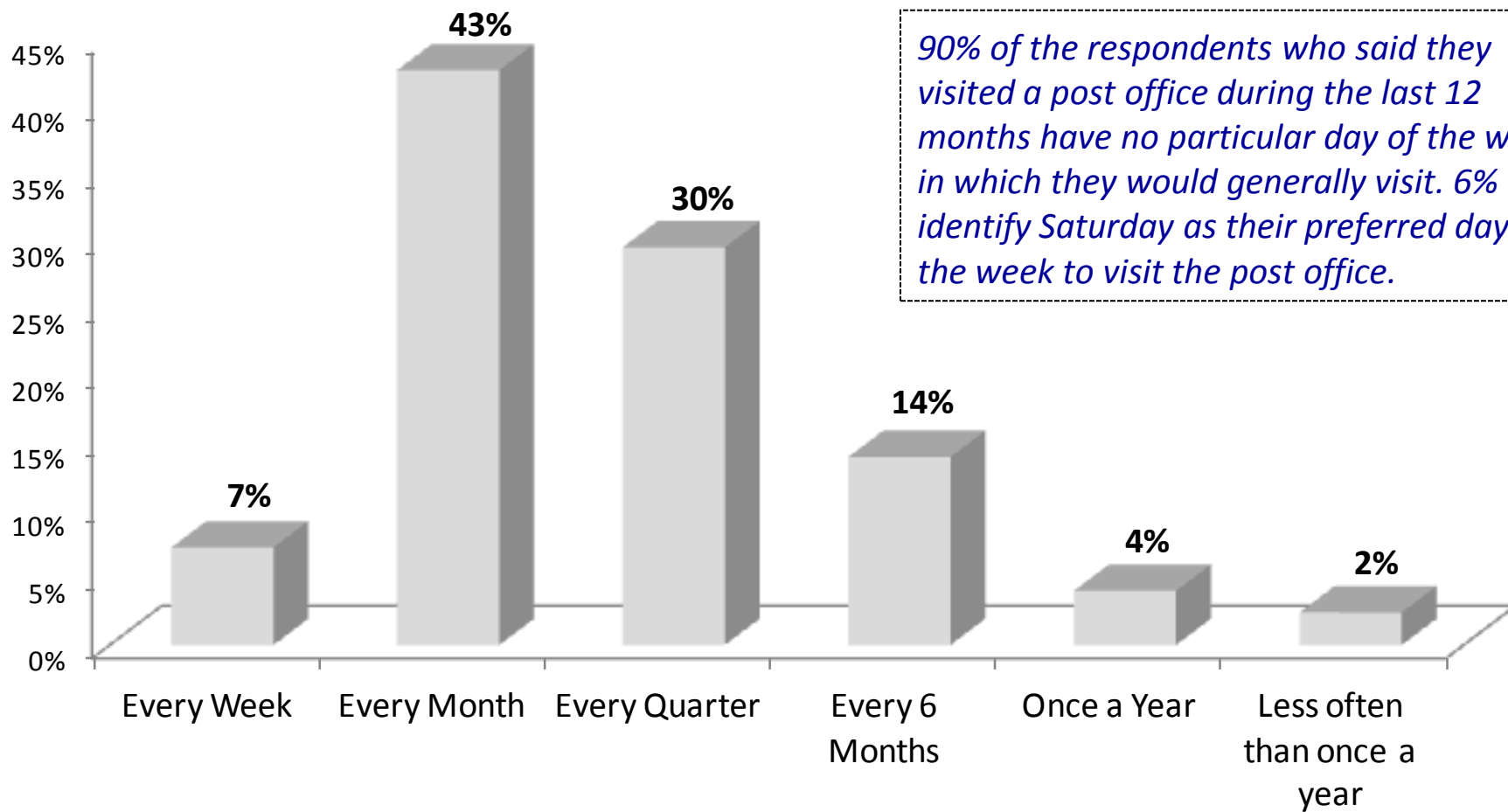
MaltaPost office MaltaPost sub-post office Both



Post Office Activity (2)

How often do you go to the Post Office?

Sample Size – 372



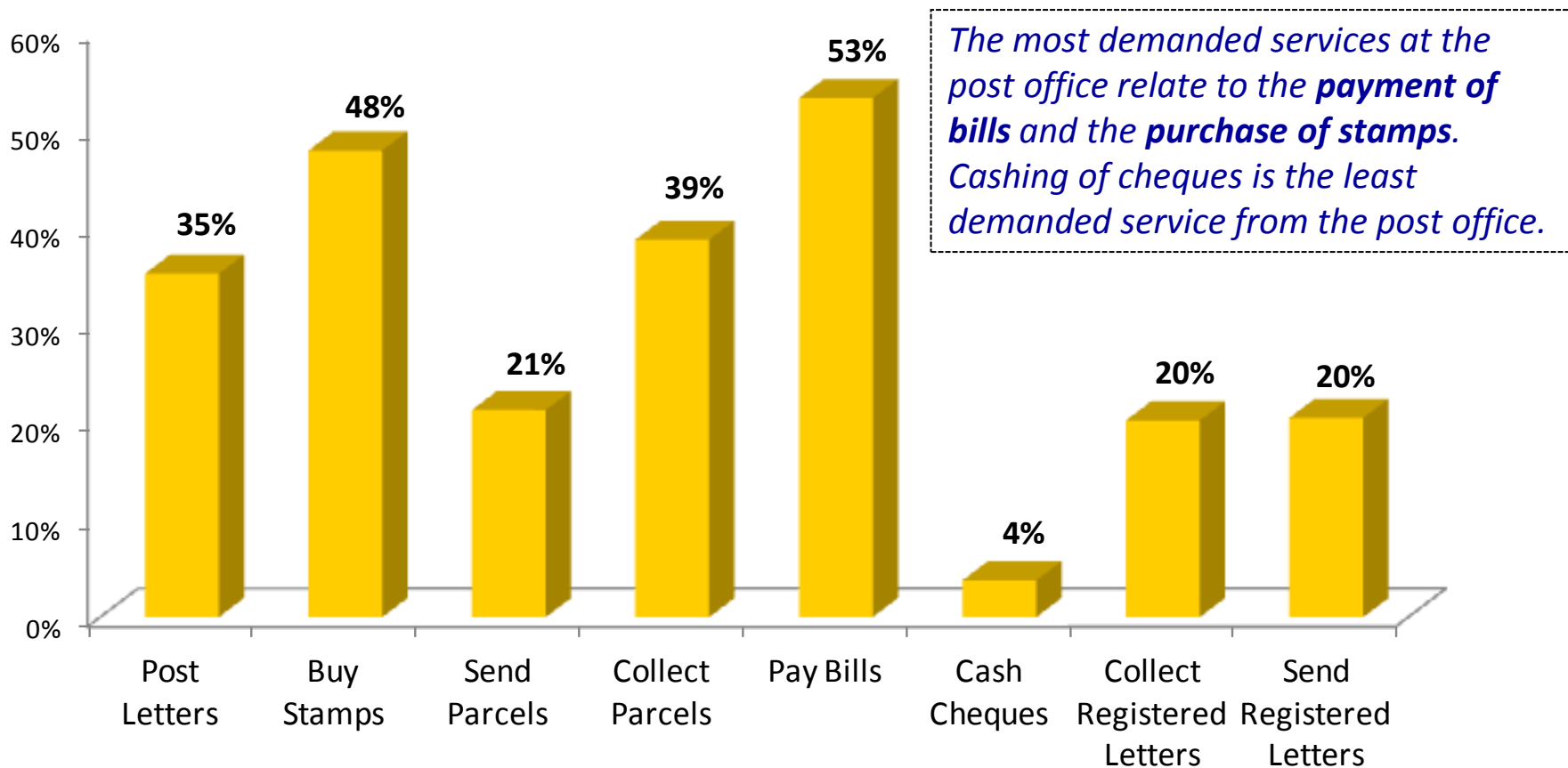
90% of the respondents who said they visited a post office during the last 12 months have no particular day of the week in which they would generally visit. 6% identify Saturday as their preferred day of the week to visit the post office.

Services at the Postal Offices

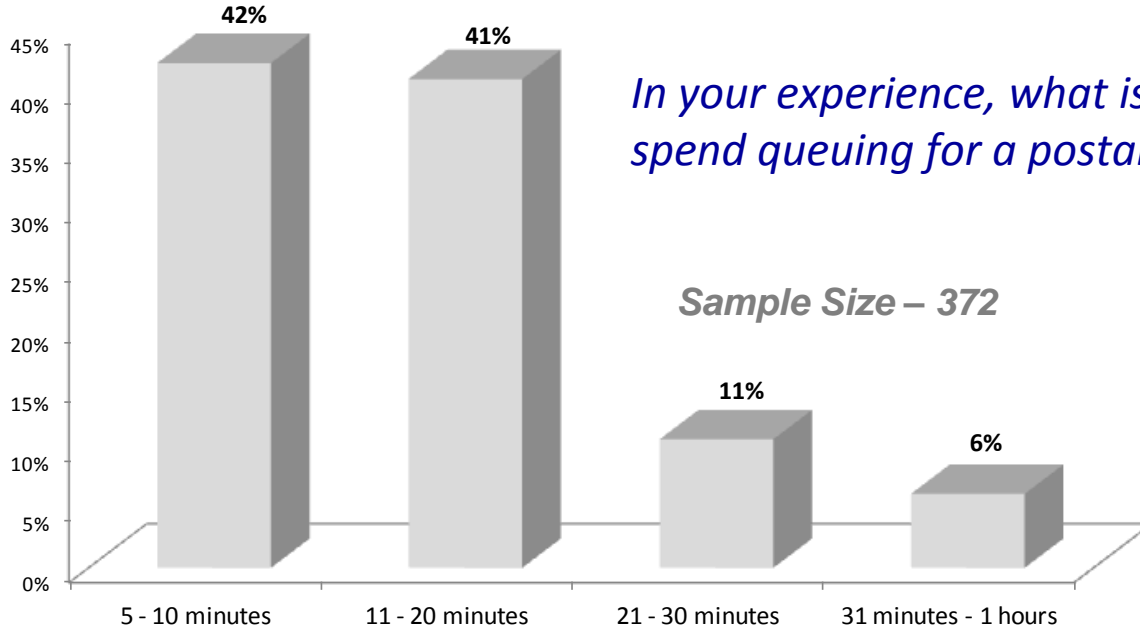
What services have been received from the Post Office?

Sample Size – 372

(respondents could mention more than one service)



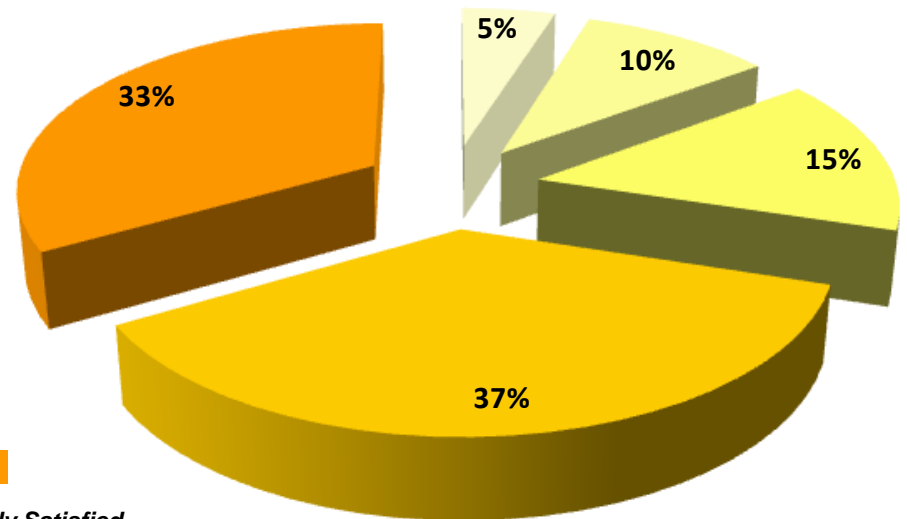
Service Efficiency



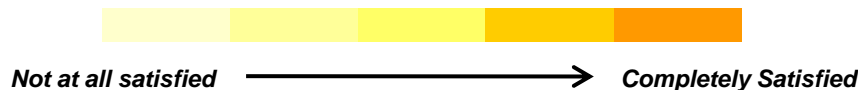
In your experience, what is the average time you generally spend queuing for a postal service at a MaltaPost office?

Do you think this is satisfactory?

Sample Size – 369
(excl. respondents who don't know)



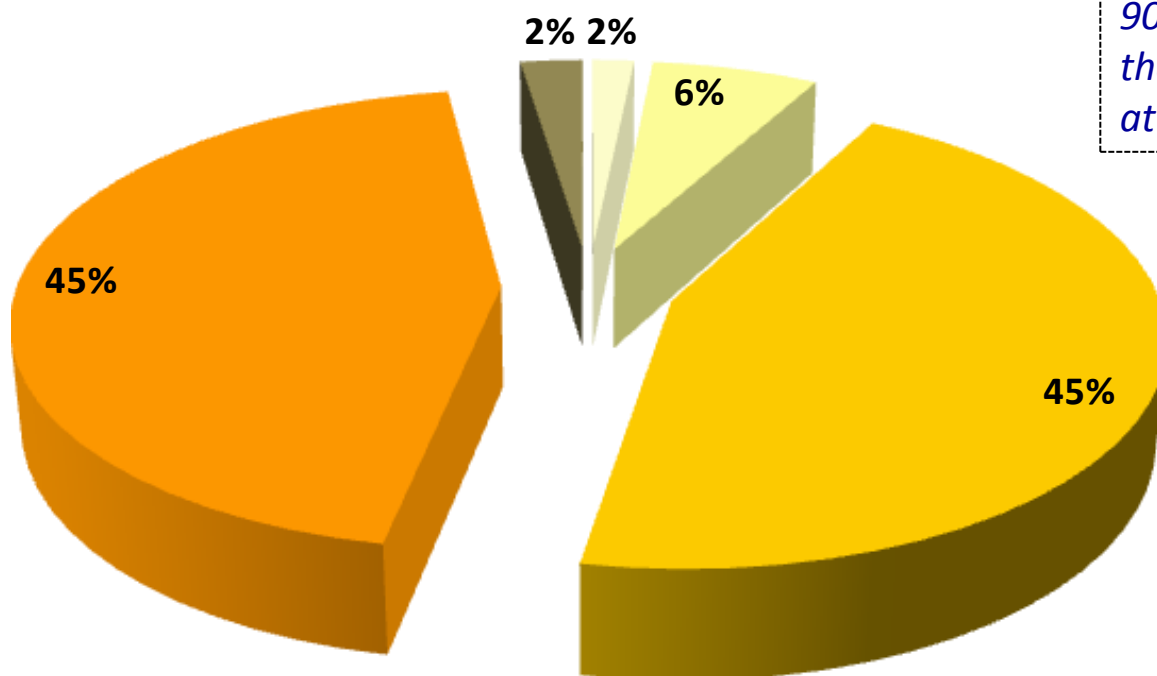
70% of respondents are happy with the waiting time.



Quality of Service Satisfaction

Are you generally satisfied with the services/facilities provided by the Post Office?

Sample Size – 372



90% of respondents are satisfied with the level of services / facilities provided at the post office .

Of the respondents that are not satisfied with the level of services provided at the post office, 63% complain about queues while 27% blame it on bad customer service.

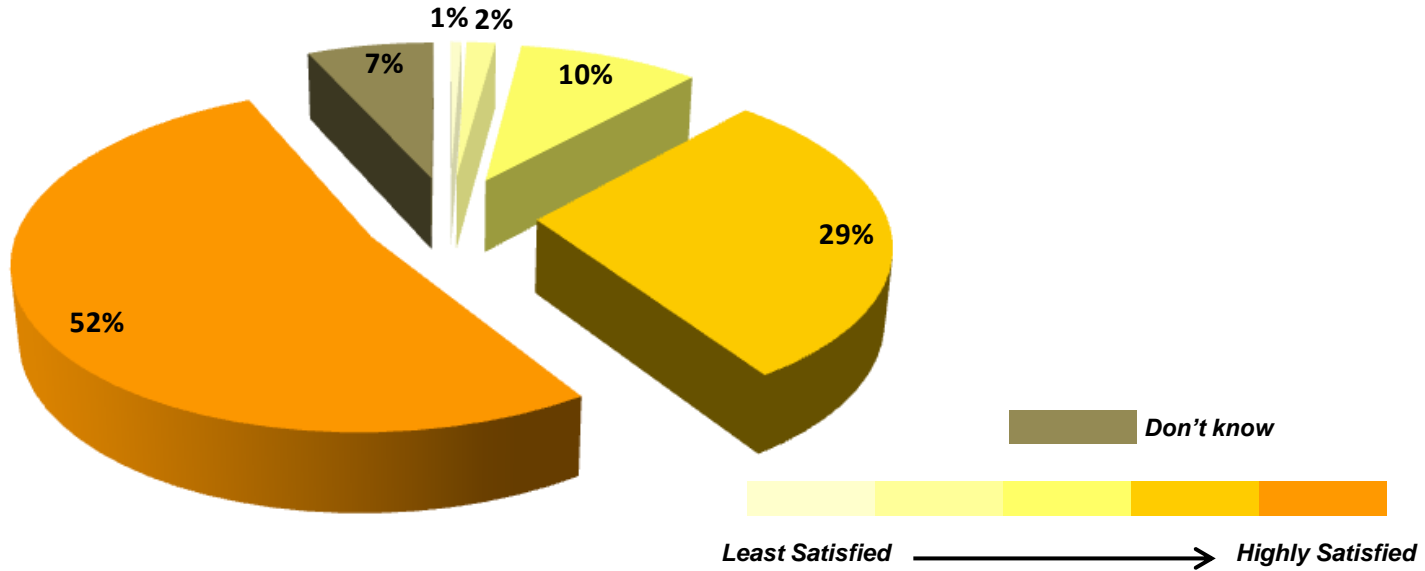


4. Consumer Satisfaction with MaltaPost's Services

Satisfaction with ...

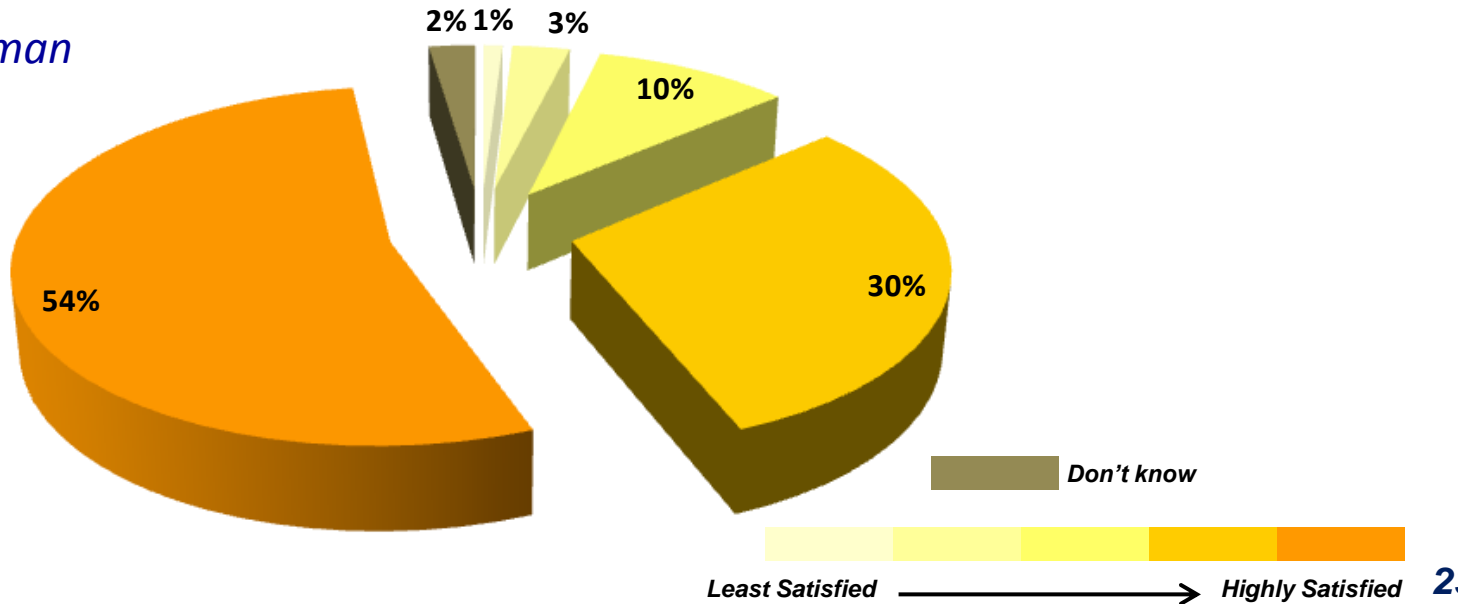
Courtesy of Postman

Sample Size – 515



Reliability of Postman

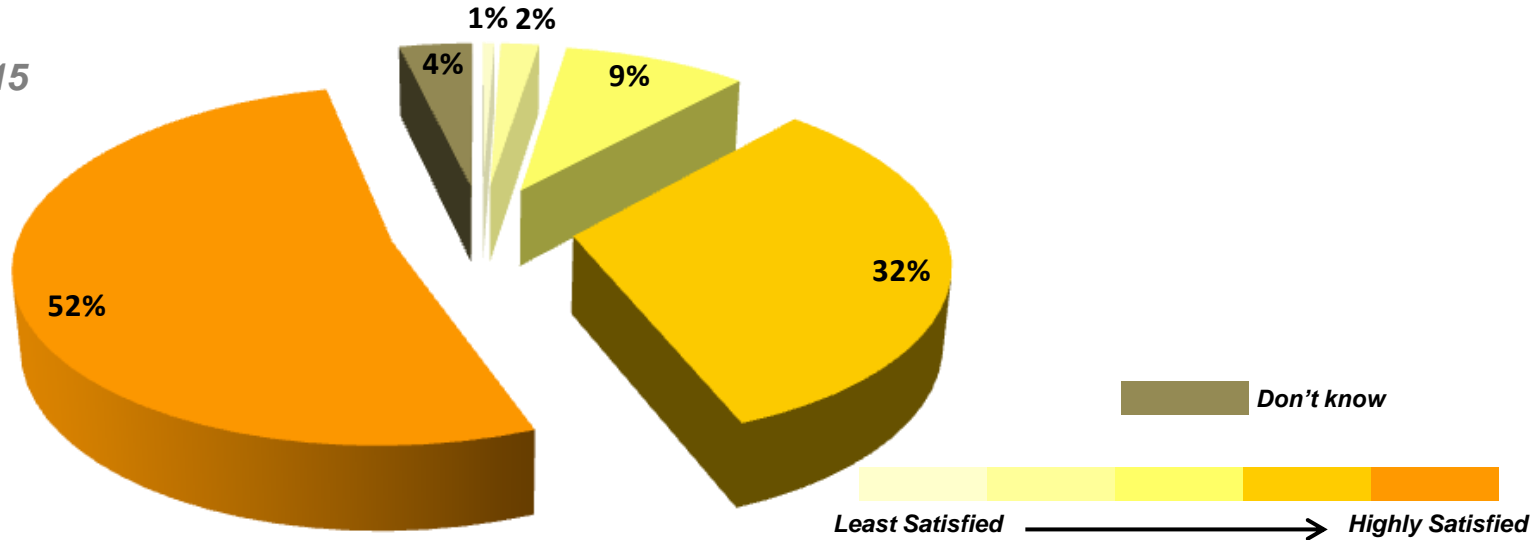
Sample Size – 515



Satisfaction with...

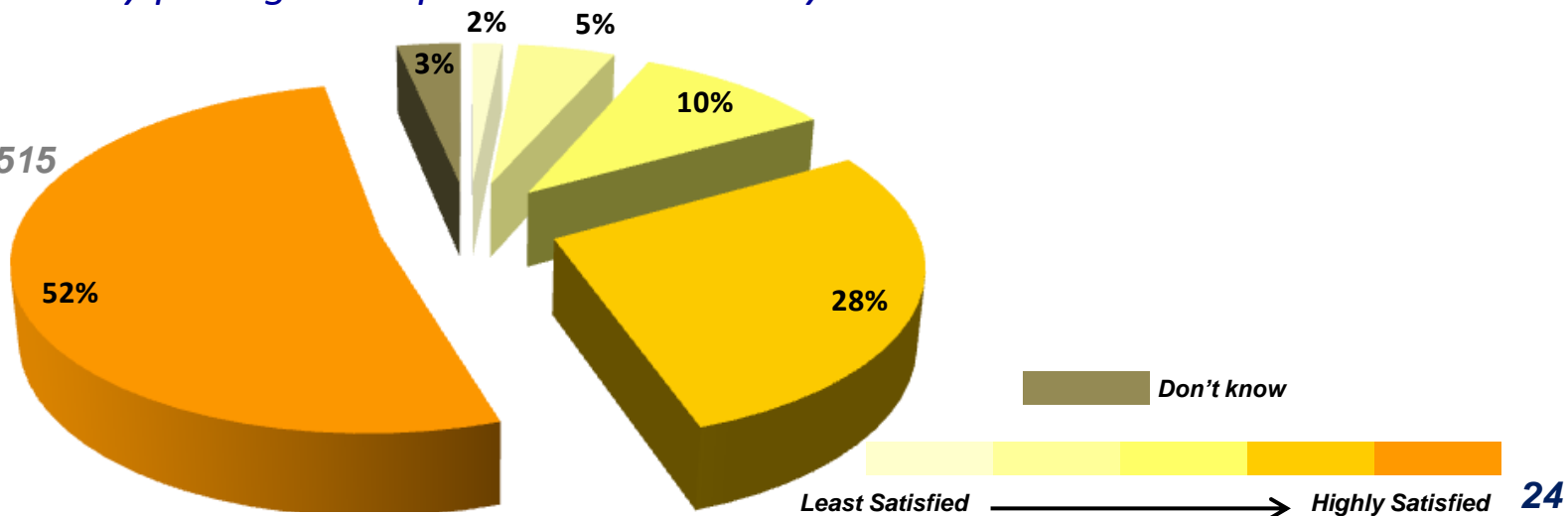
The time your post is delivered each day

Sample Size – 515



The availability to buy postage stamps when and where you want

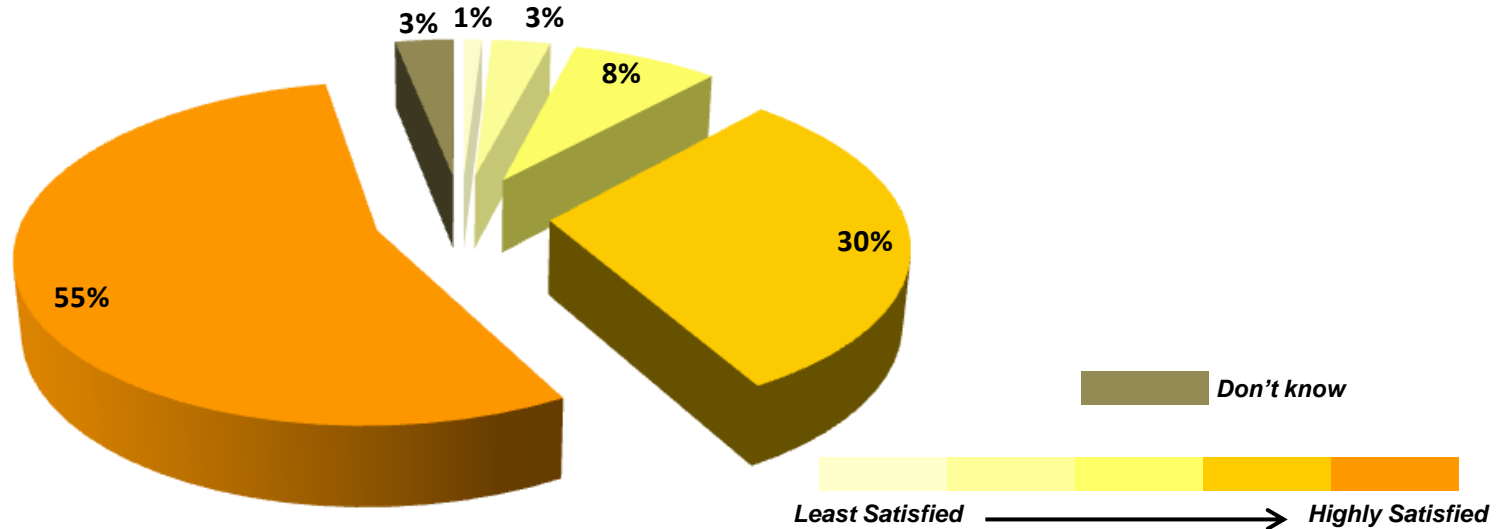
Sample Size – 515



Satisfaction with...

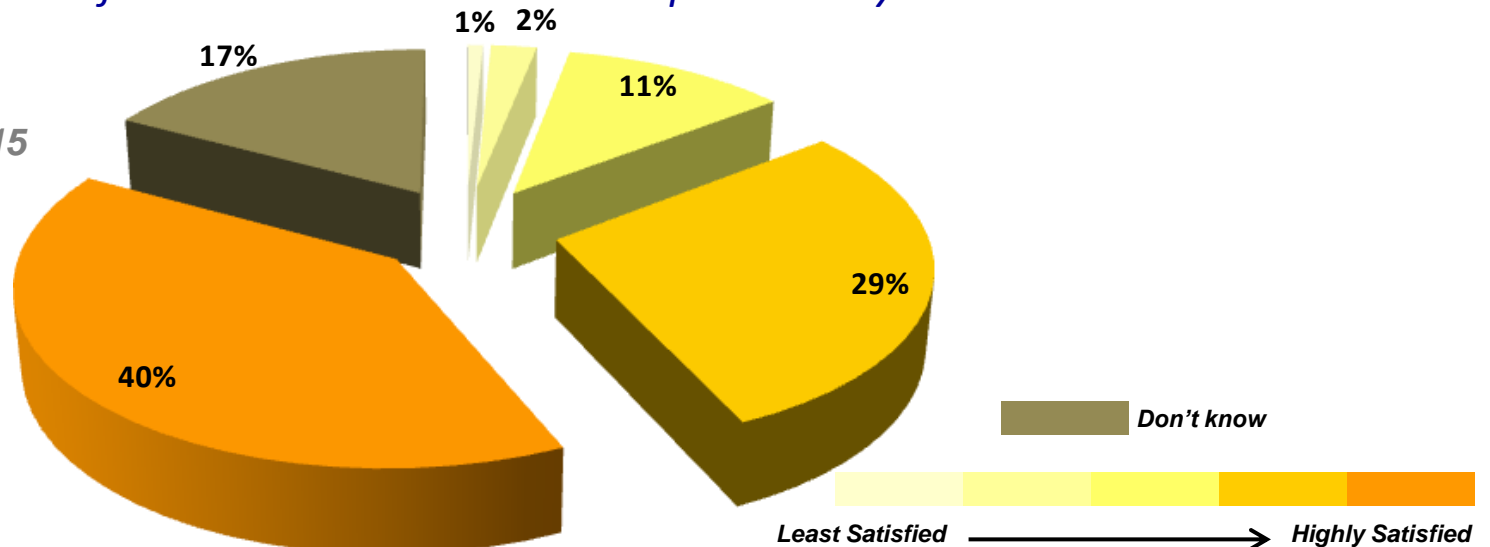
The availability of a letterbox where you can post your letters

Sample Size – 515



The accessibility to information about the services provided by MaltaPost

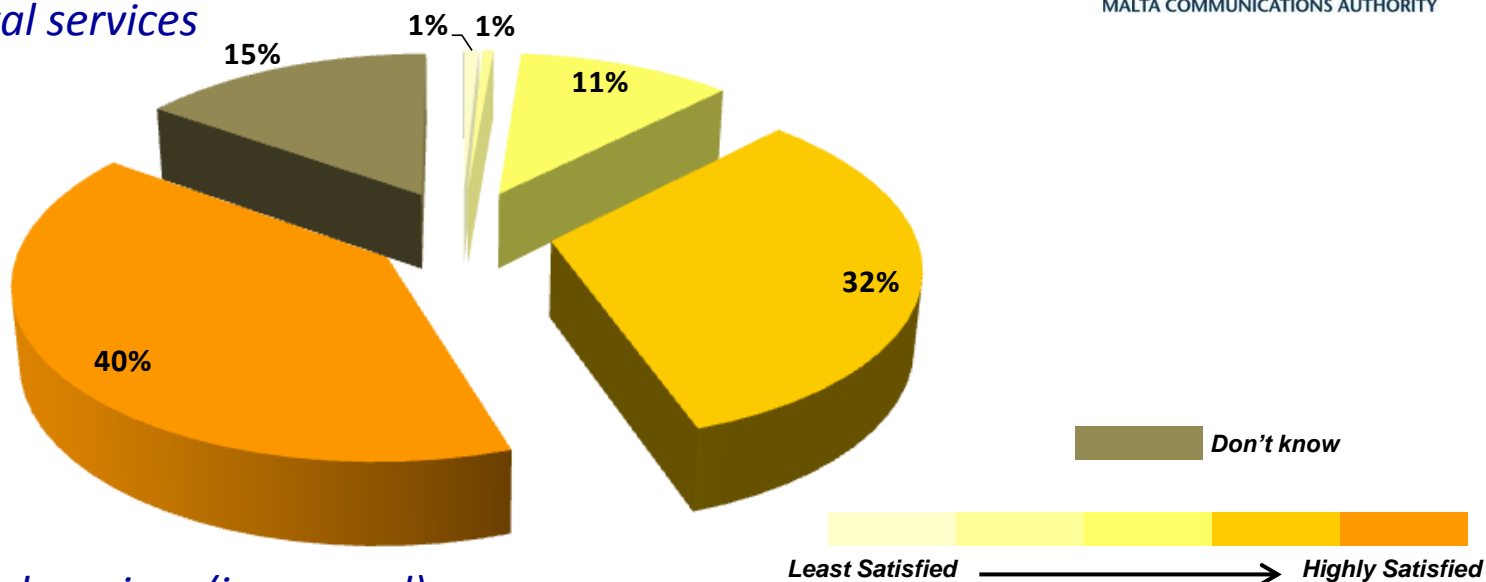
Sample Size – 515



Satisfaction with...

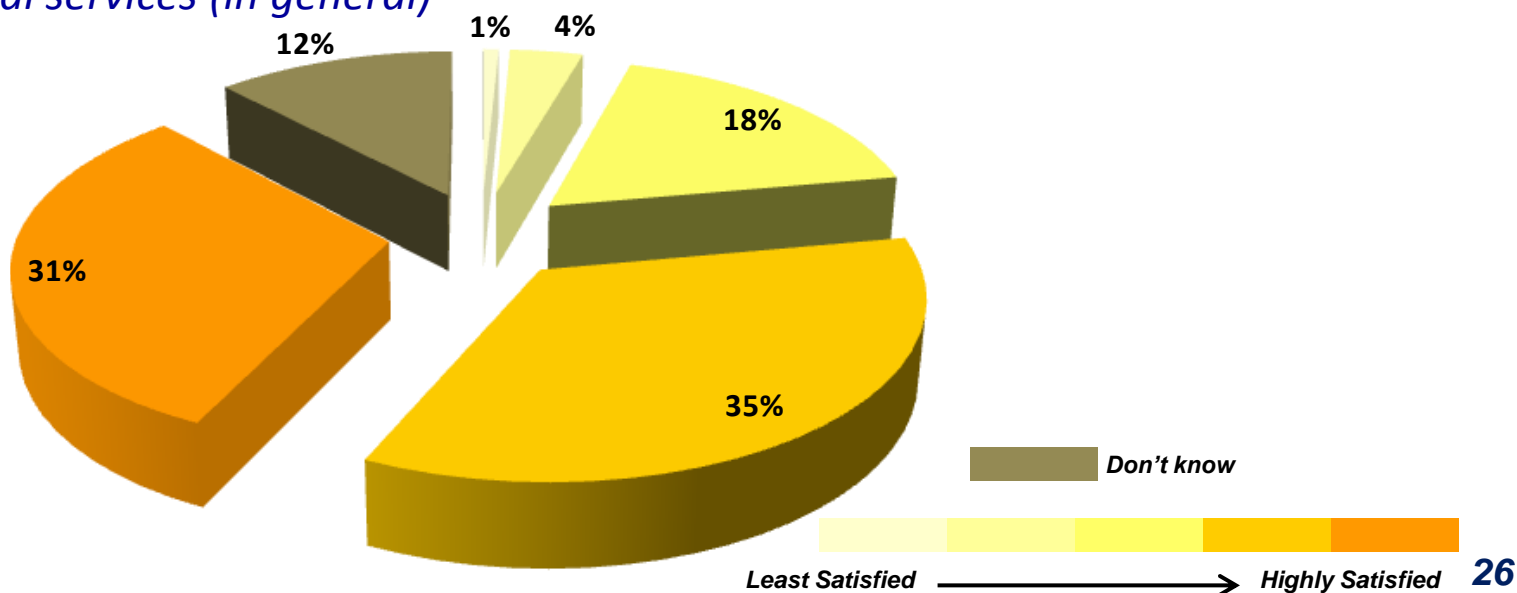
The range of postal services

Sample Size – 515



The prices of postal services (in general)

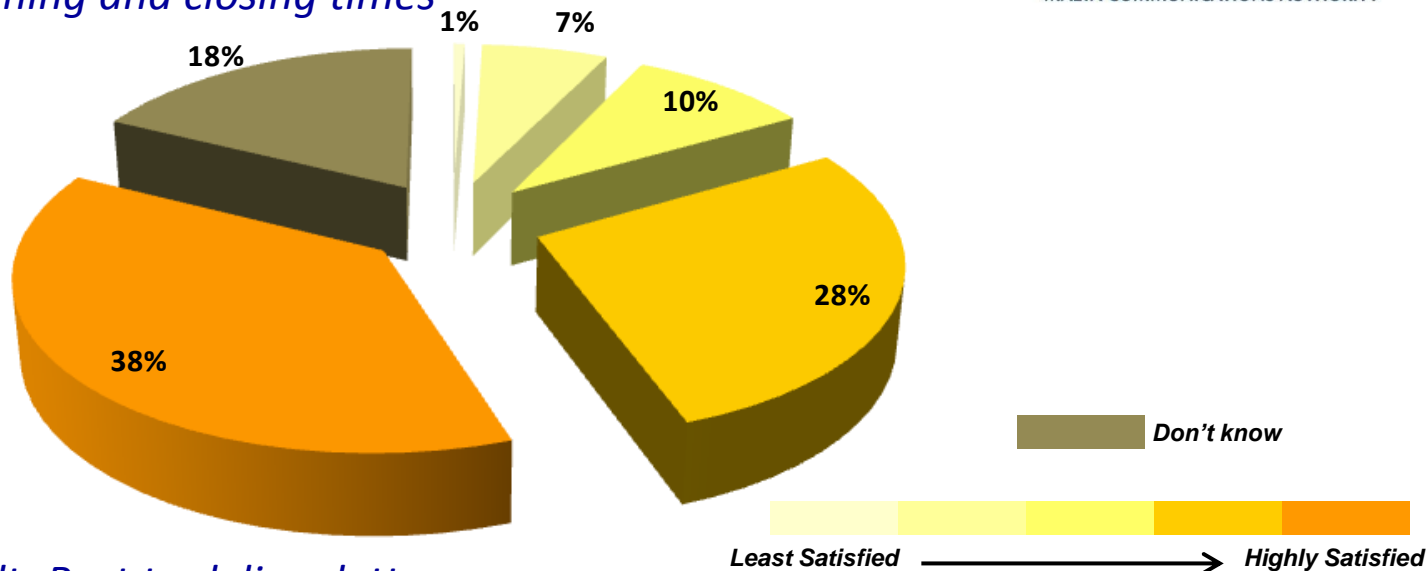
Sample Size – 515



Satisfaction with...

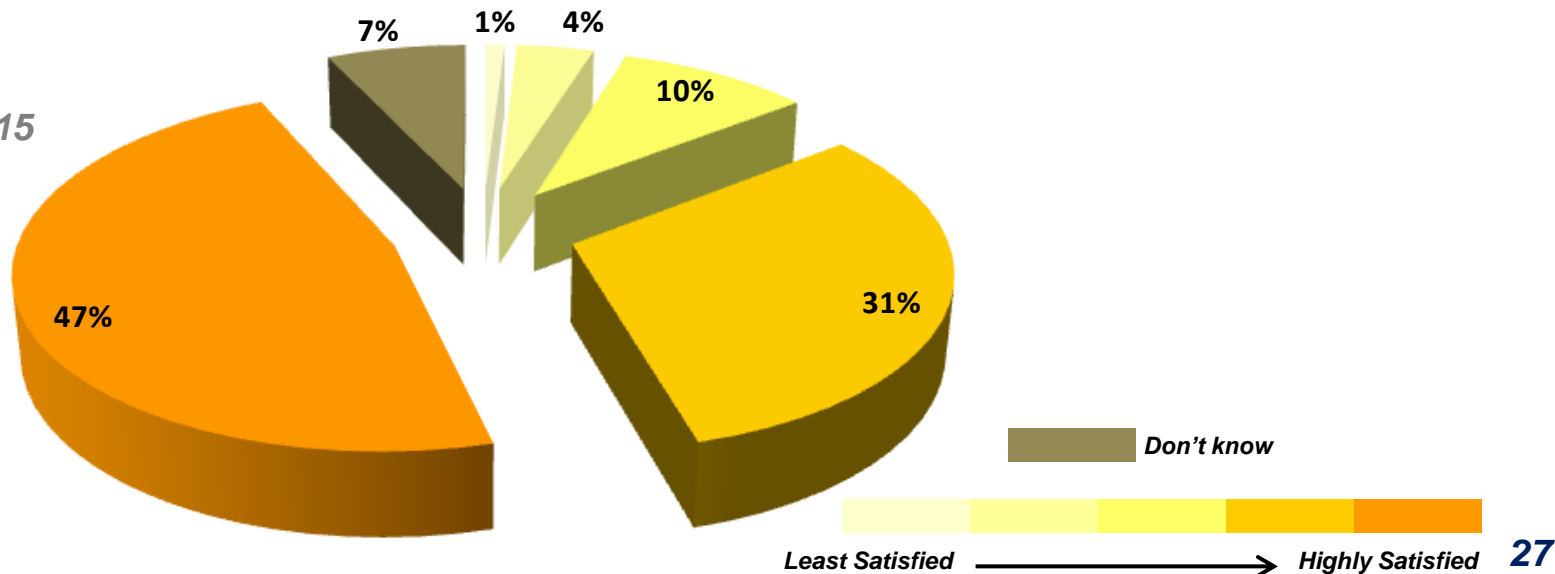
MaltaPost Offices' opening and closing times

Sample Size – 515



The time it takes MaltaPost to deliver letters

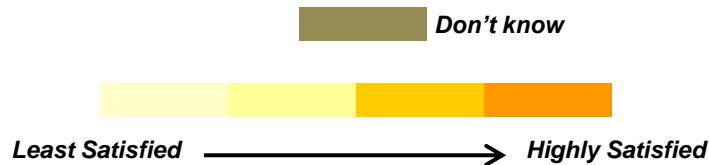
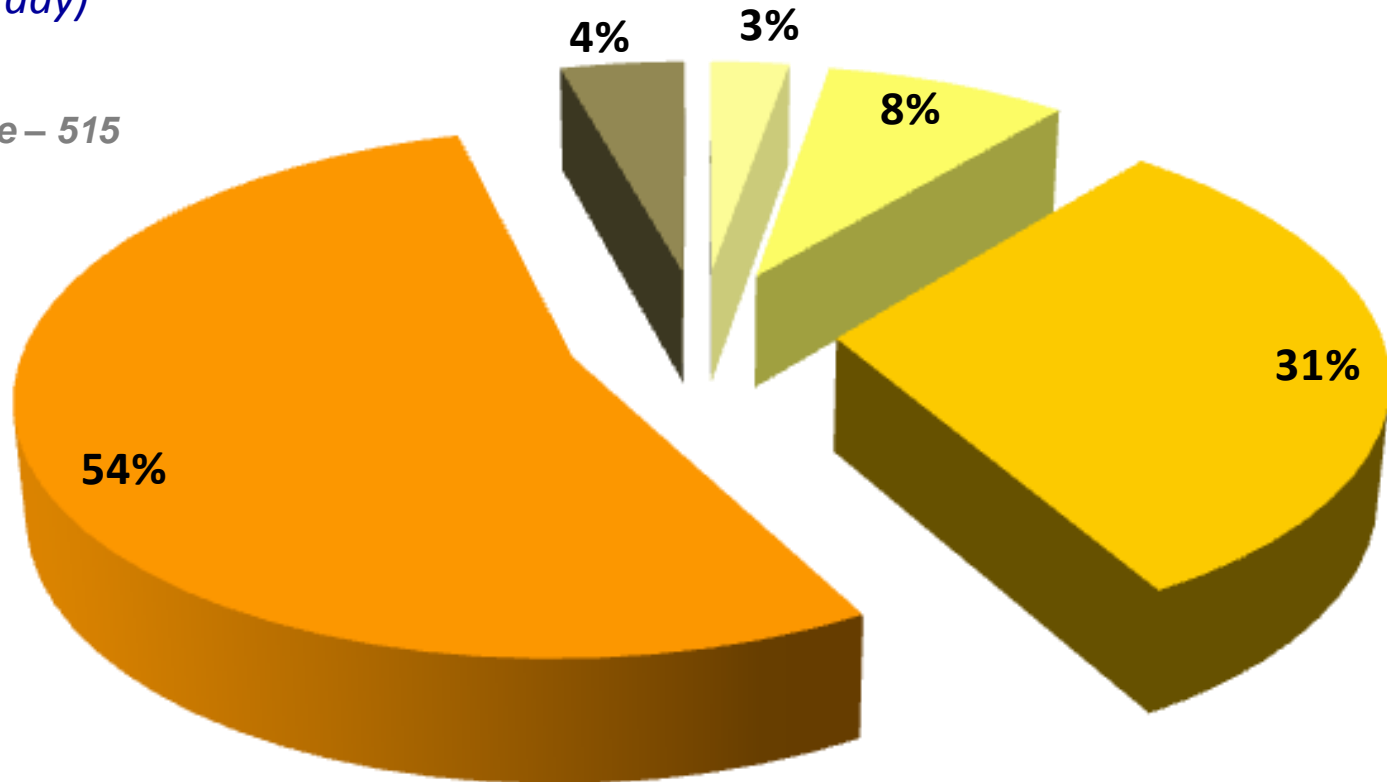
Sample Size – 515



Satisfaction with...

The latest collection time for next day delivery from your usual letterbox (latest time one can post a letter in order to be delivered the following day is 7pm from Monday to Friday & 3pm on Saturday)

Sample Size – 515

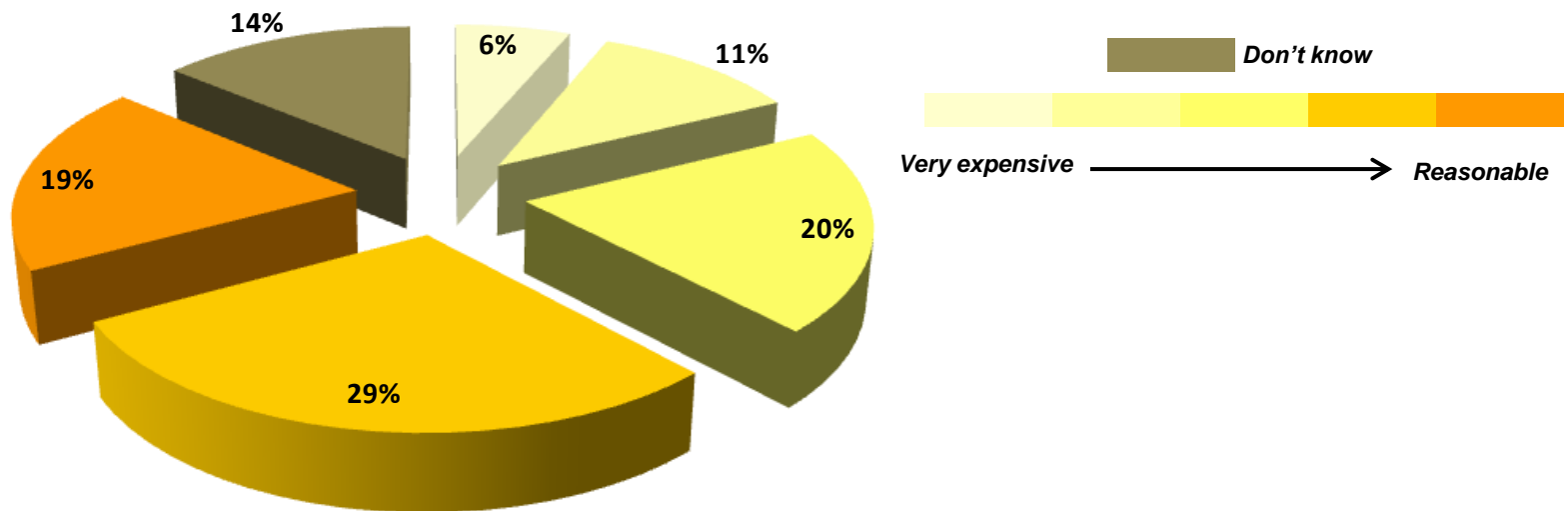


MaltaPost's Parcel Service (1)

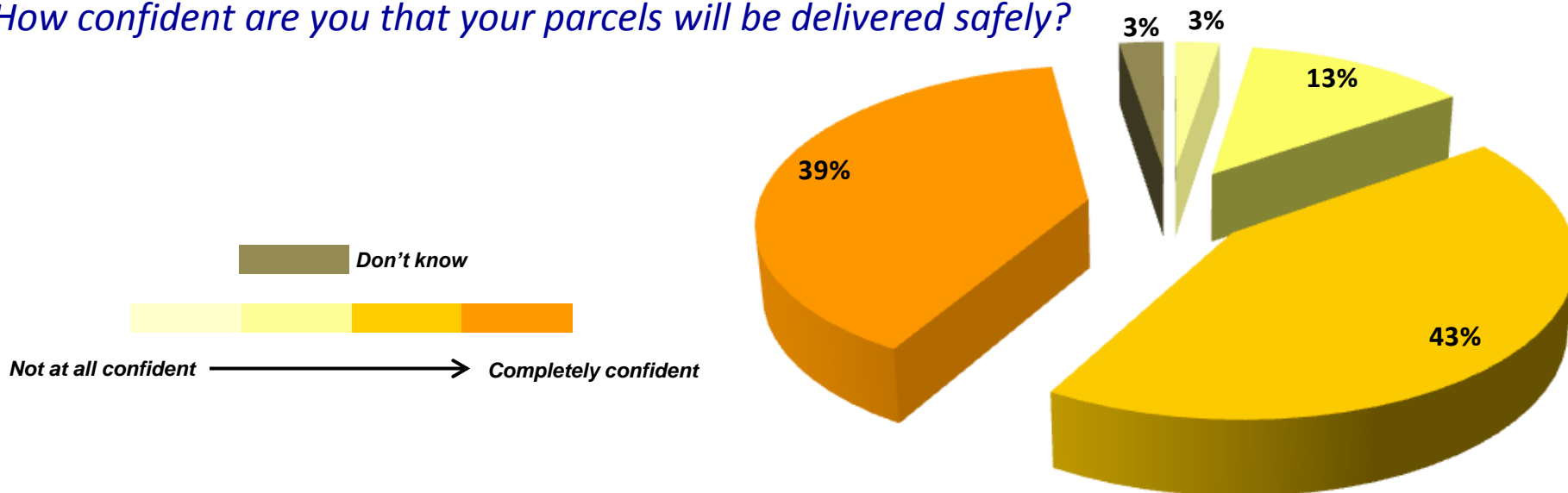
Sample Size – 79
(households that send parcels)



How expensive / reasonable do you find the prices of parcel post?



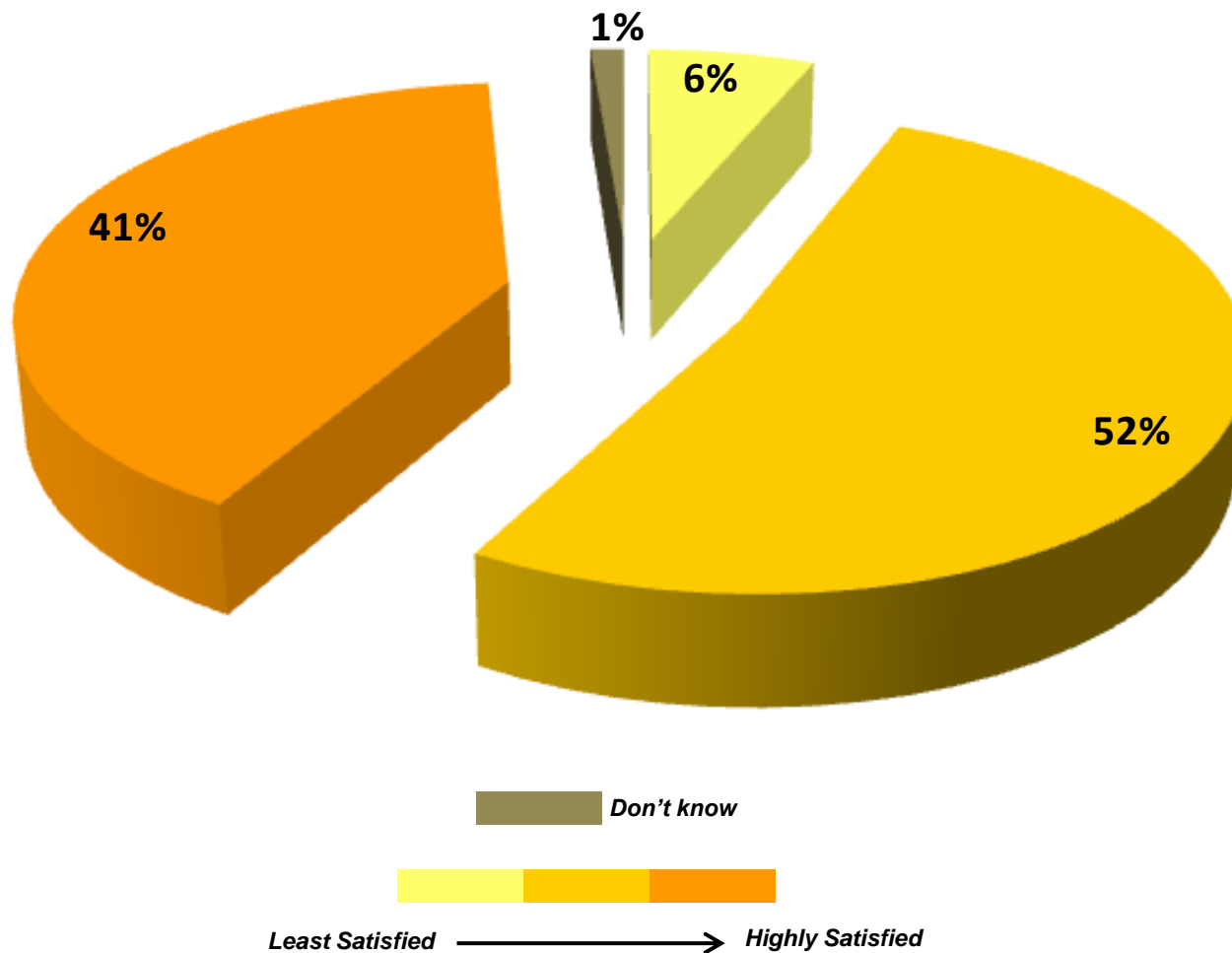
How confident are you that your parcels will be delivered safely?



MaltaPost's Parcel Service (2)

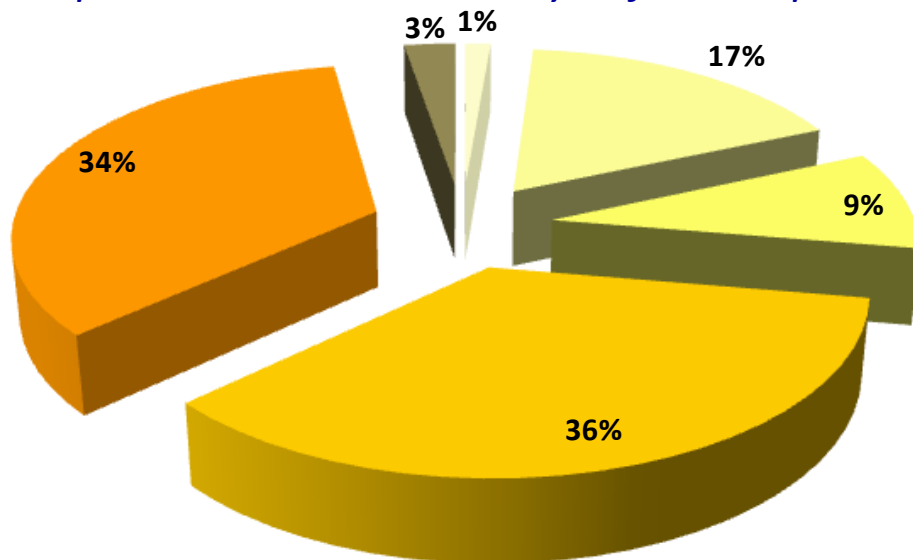
Sample Size – 79
(households that send parcels)

How satisfied are you with MaltaPost's parcel services ?

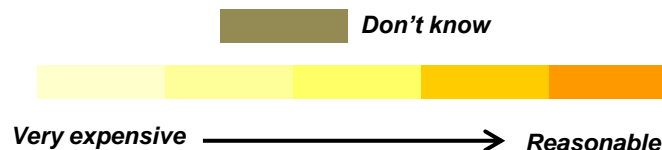


MaltaPost's Registered Mail Service (1)

How expensive / reasonable do you find the prices of registered mail?

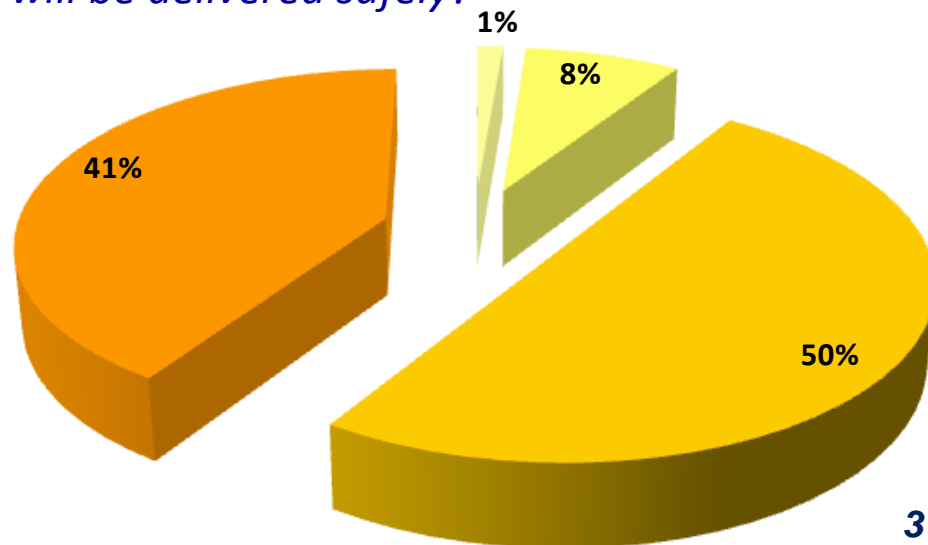


*Sample Size – 76
(households that send registered mail)*



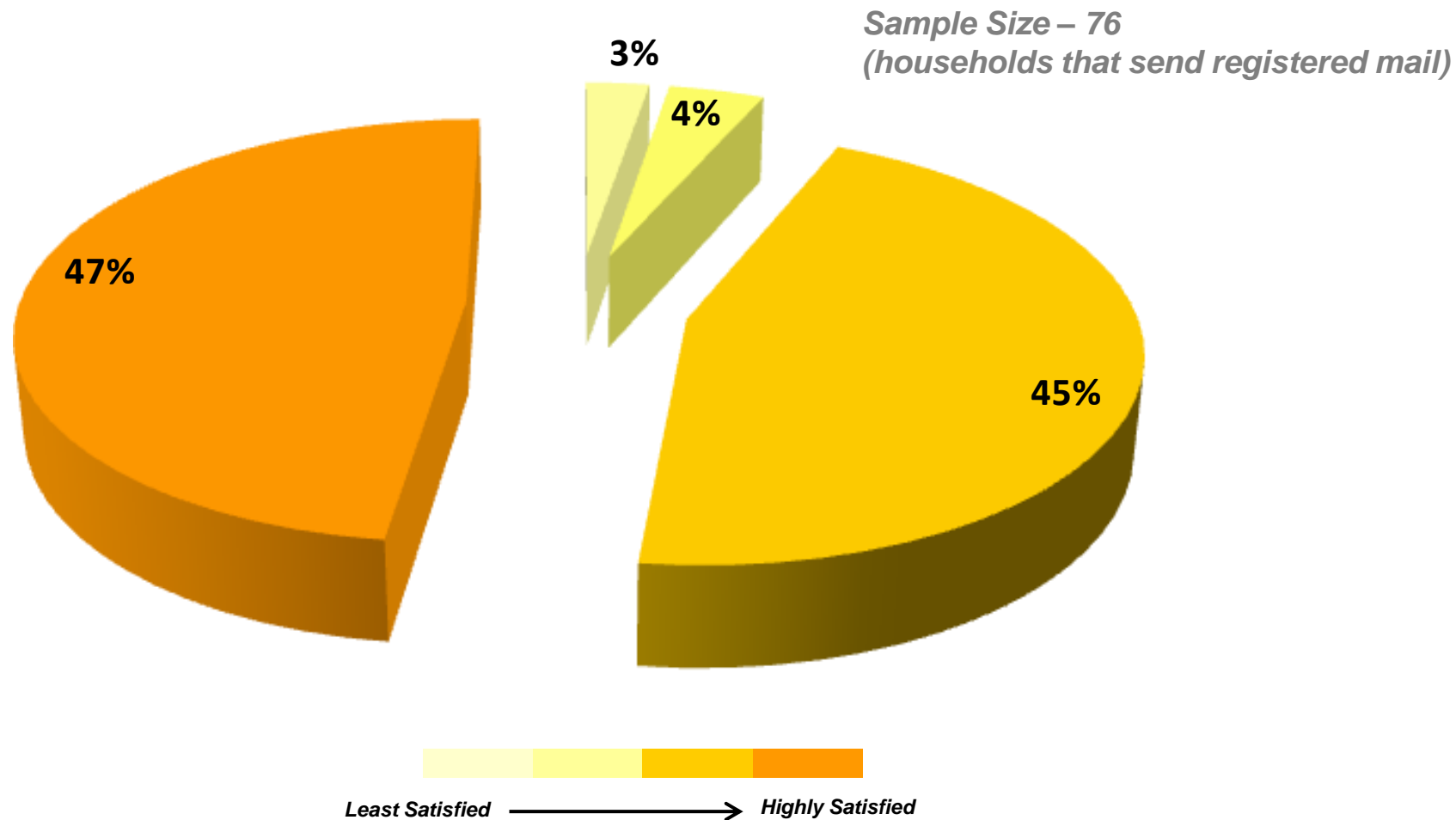
How confident are you that your registered mail will be delivered safely?

*Sample Size – 76
(households that send registered mail)*



MaltaPost's Registered Mail Service (2)

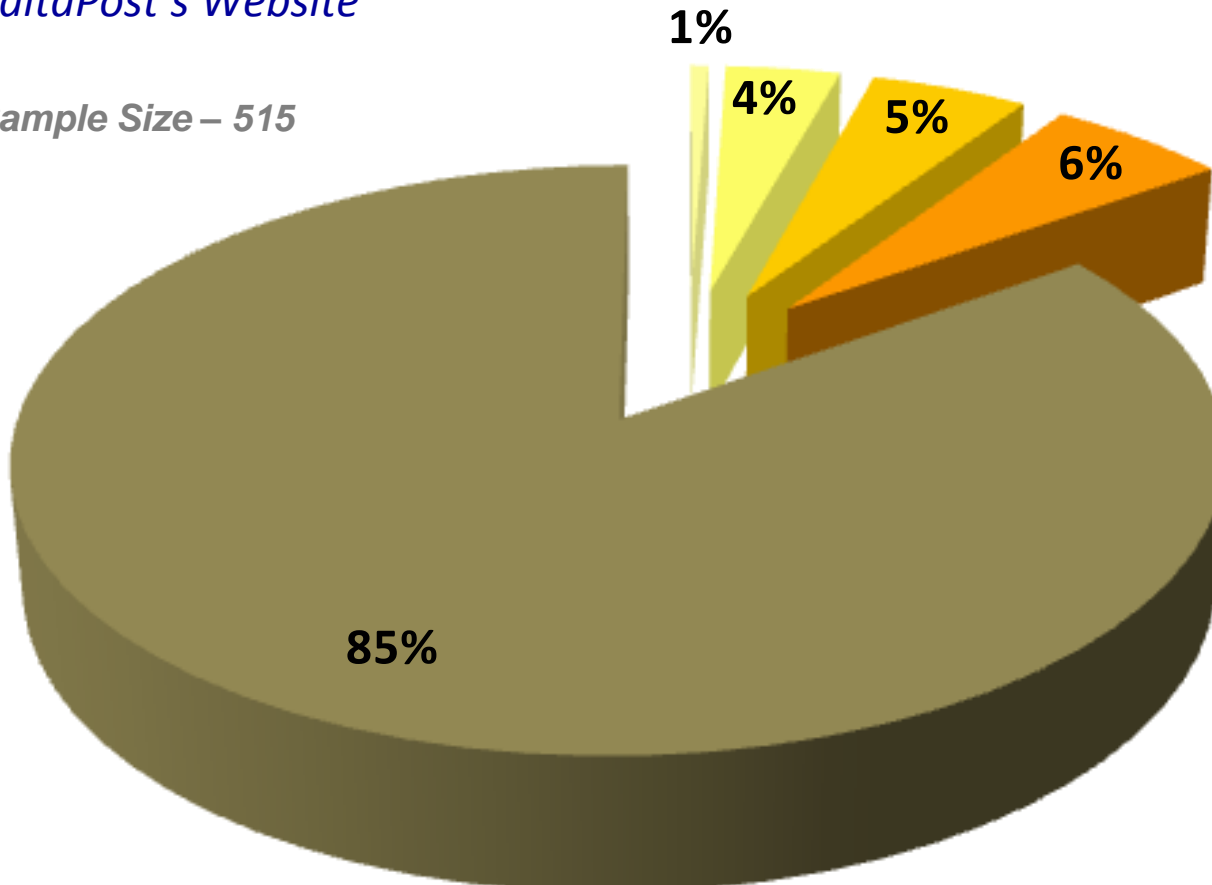
How satisfied are you with MaltaPost's registered mail service ?



Satisfaction with...

MaltaPost's Website

Sample Size – 515



85% of households claim to have never used the MaltaPost's website.

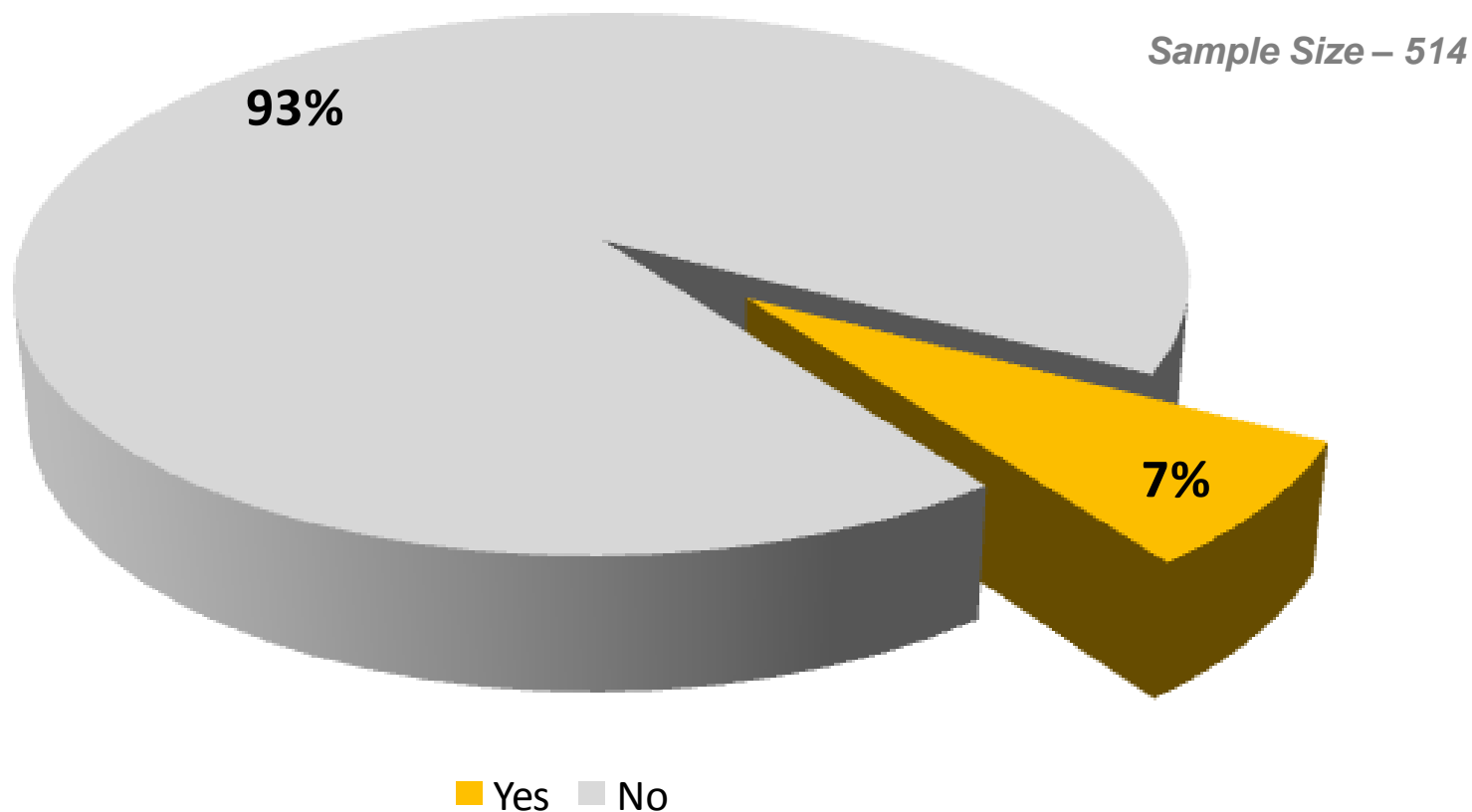
Results from the survey show that MaltaPost's website is mostly used to track parcels and search for postcodes.

Never Used

Least Satisfied → Highly Satisfied

Complaint Issues (1)

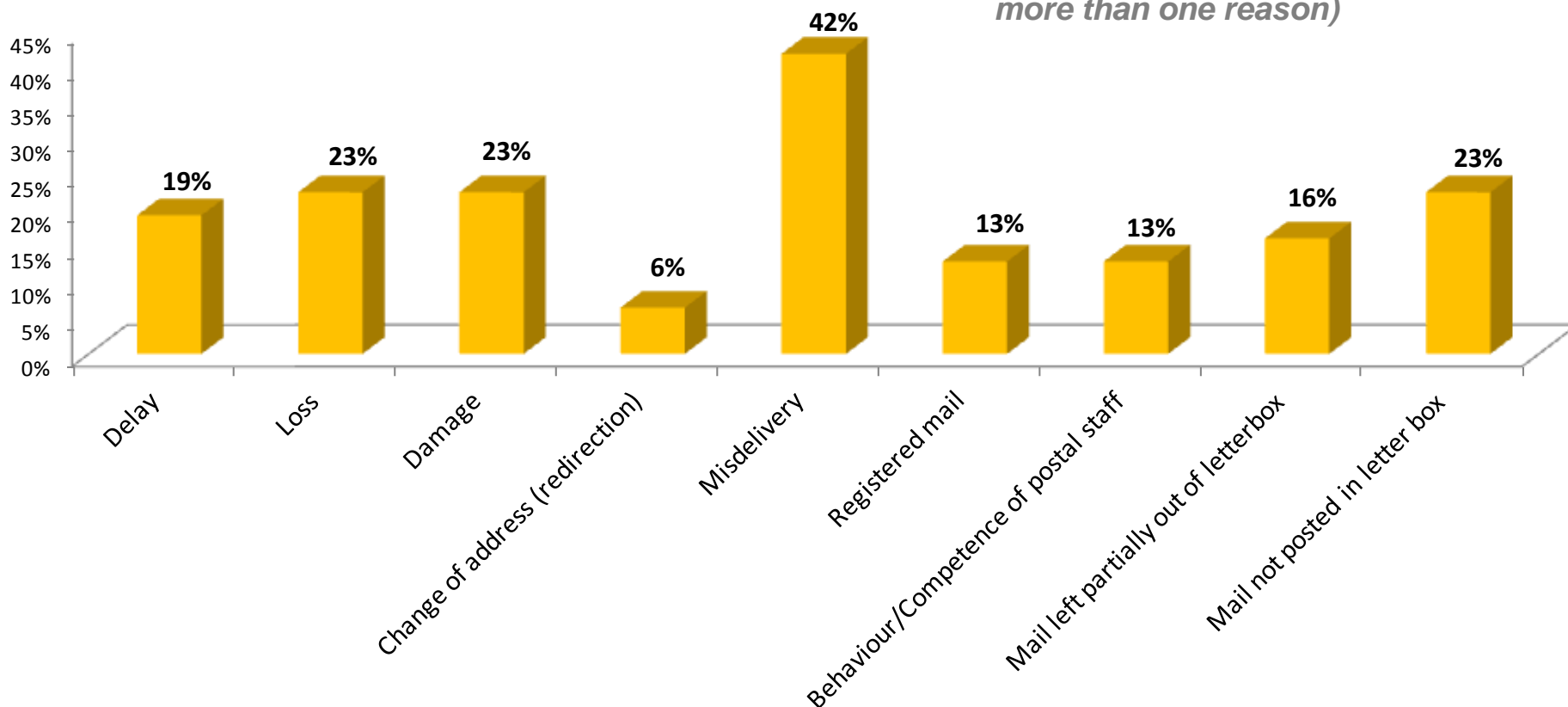
In the last 12 months, have you (or any member of your family) personally made a formal complaint to MaltaPost about any aspect of postal services?



Complaint Issues (2)

What was the complaint about?

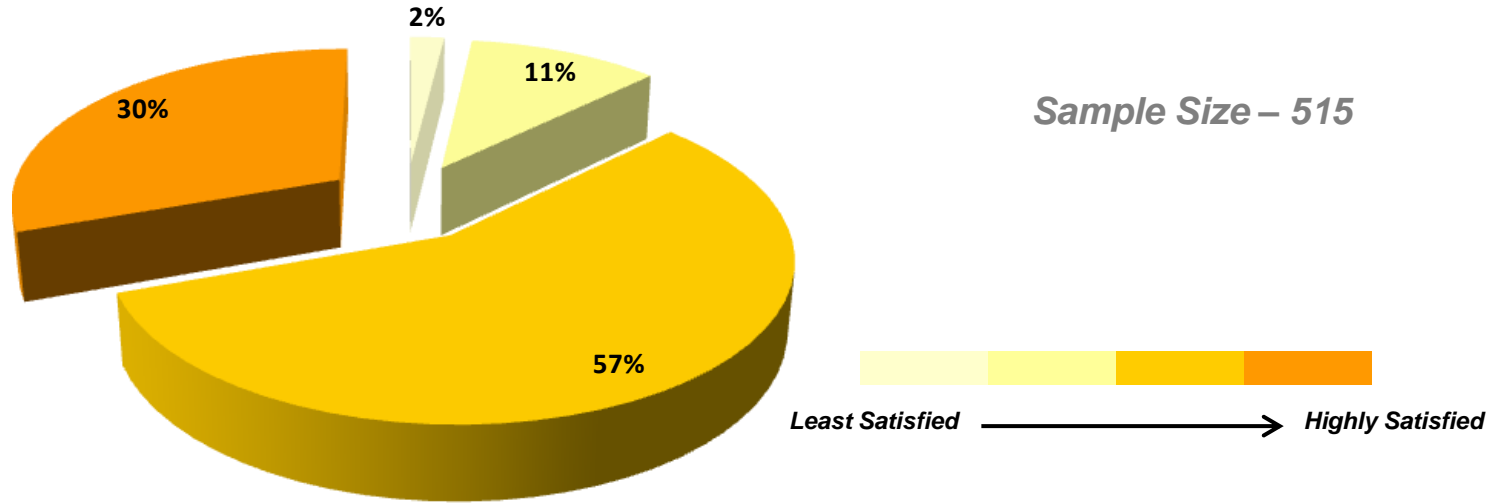
*Sample Size – 37
(each respondent could give more than one reason)*



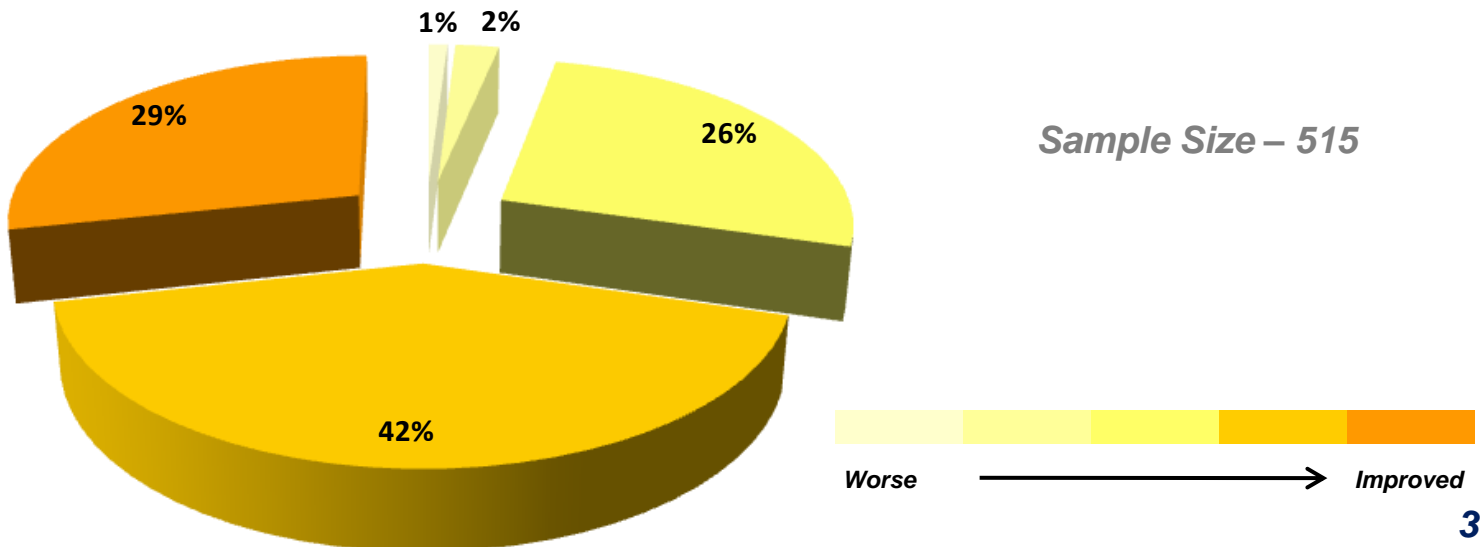
54% of households who had made a formal complaint with MaltaPost were satisfied or highly satisfied with the way their complaint had been handled.

Overall Satisfaction with MaltaPost Services

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



In your experience how would you rate the overall service provided by MaltaPost over the last 12 months?





www.mca.org.mt