



MCA Market Research
Postal Services – Household Survey Results

MCA | *June 2014*

1. 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

Ernst & Young carried out the survey between March and April 2014 on behalf of the MCA

Fieldwork

- Interviews were carried out by telephone lasting around 15 minutes
- 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 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 items in that household

Responses

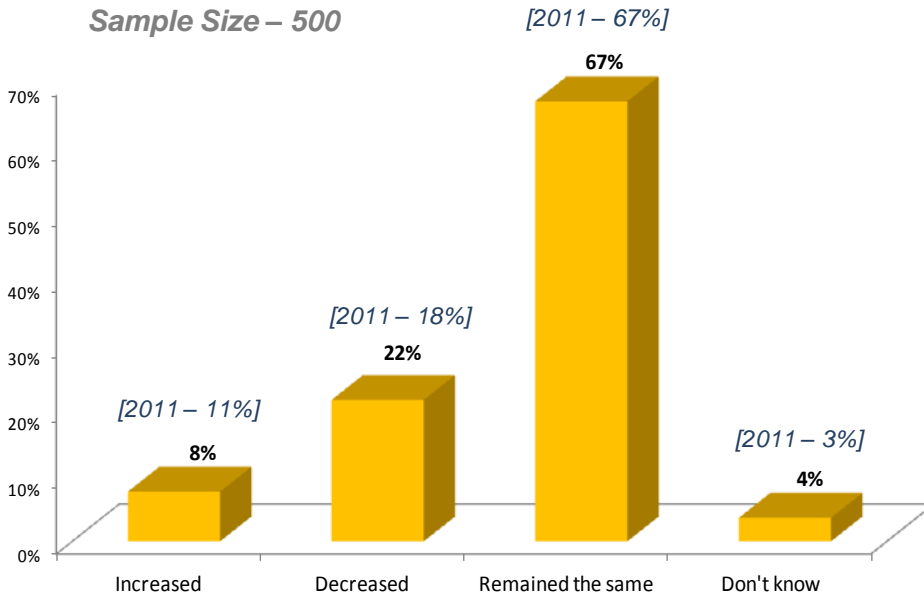
- 500 net respondents
- Any refusals / incomplete surveys were re-allocated to achieve a net sample of 500 interviewees
- Margin of error +/- 4.38% at 95% confidence interval

2. Household Postal Services in Malta

Activity of Postal Services in the Maltese Households (1)

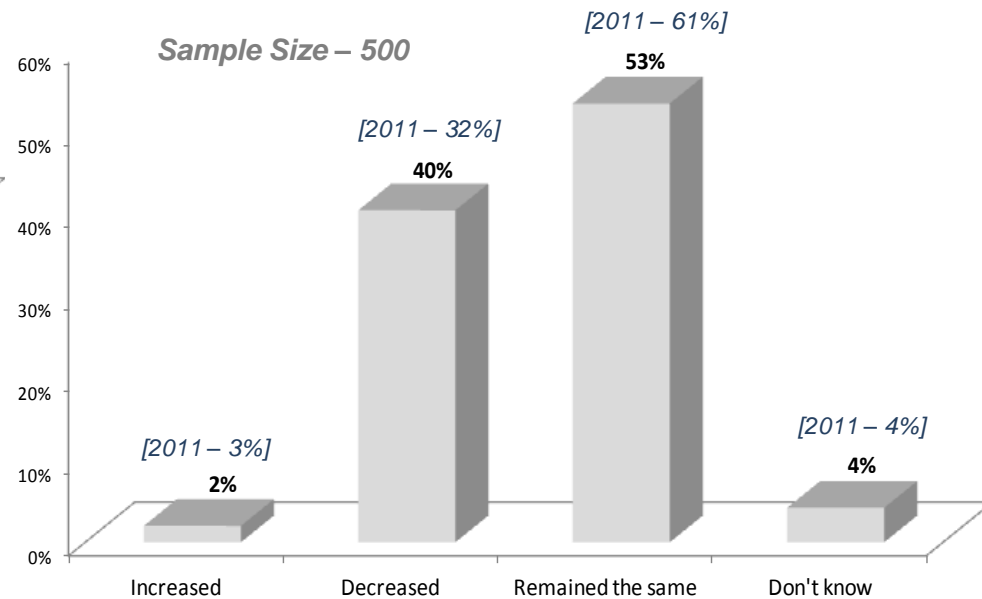
*Did the number of addressed letters **received** each week increase, decrease, or remain the same over the past twelve months?*

Sample Size – 500



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

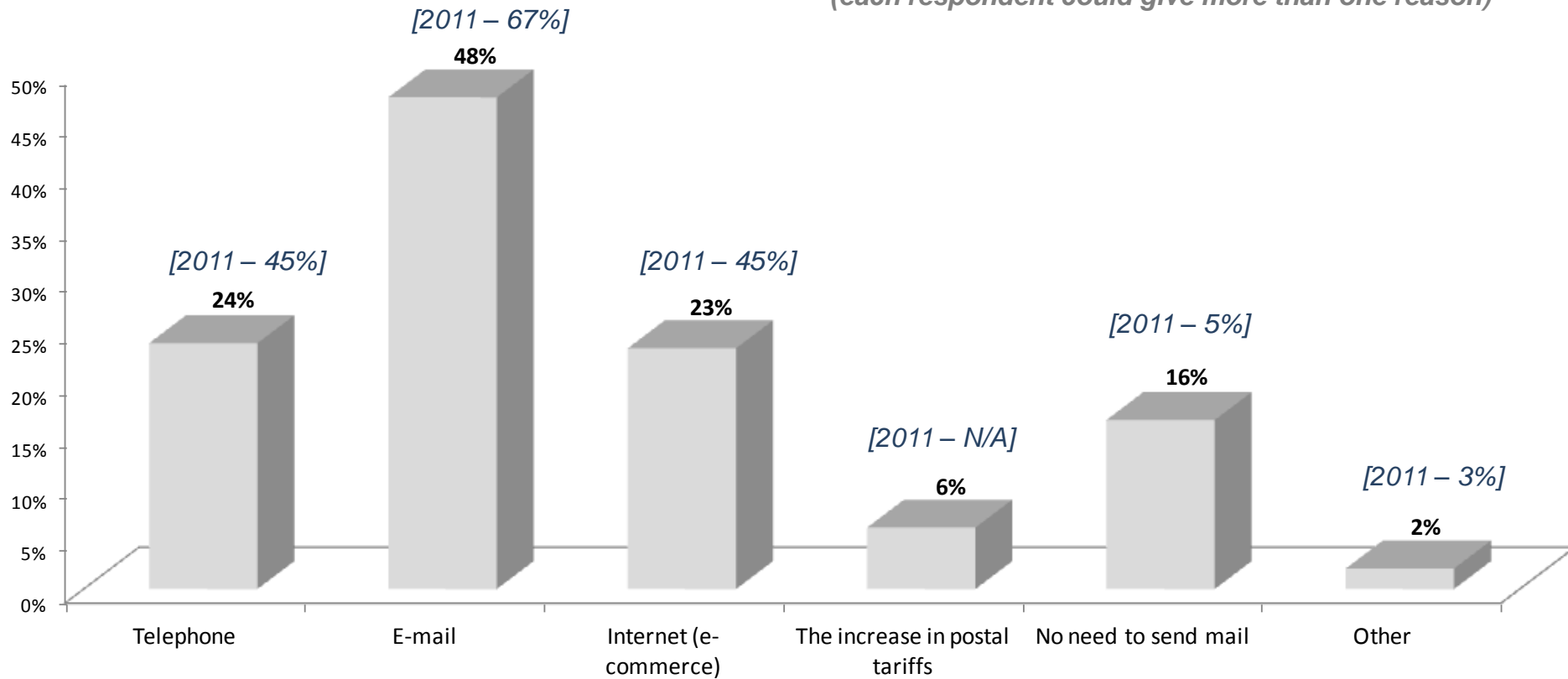
Sample Size – 500



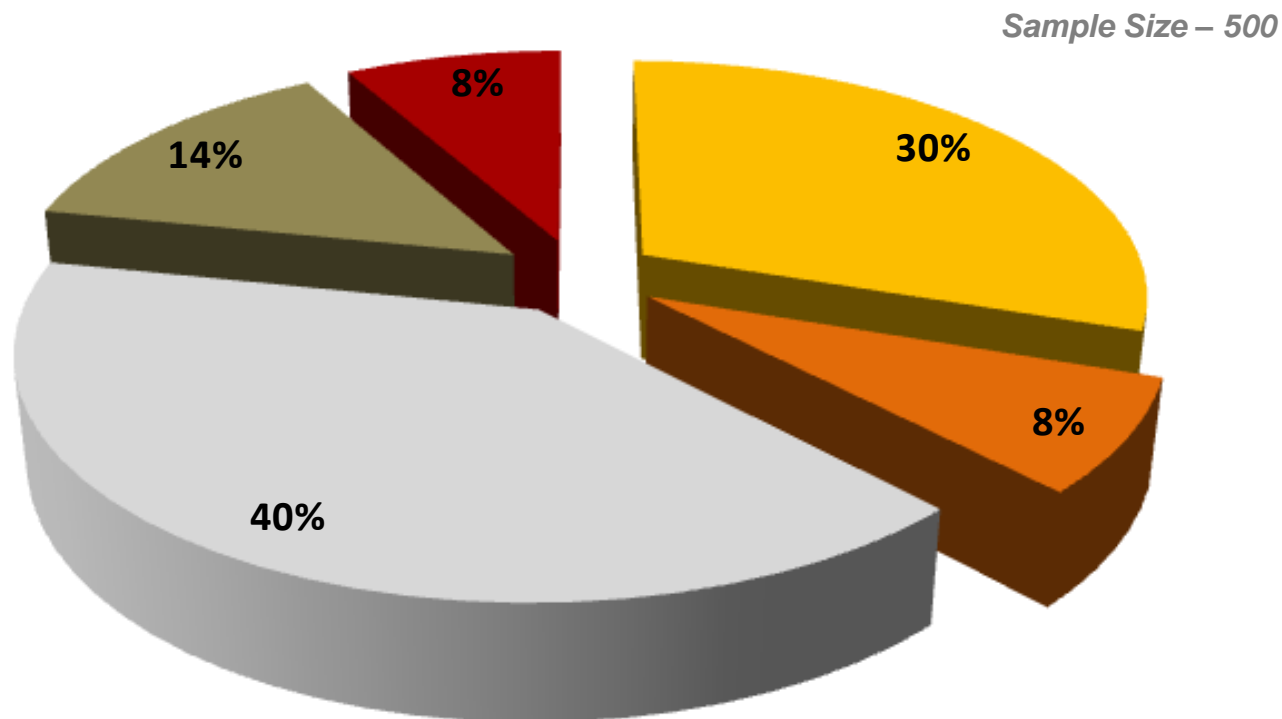
Activity of Postal Services in the Maltese Households (2)

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

*Sample Size – 202
(each respondent could give more than one reason)*



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

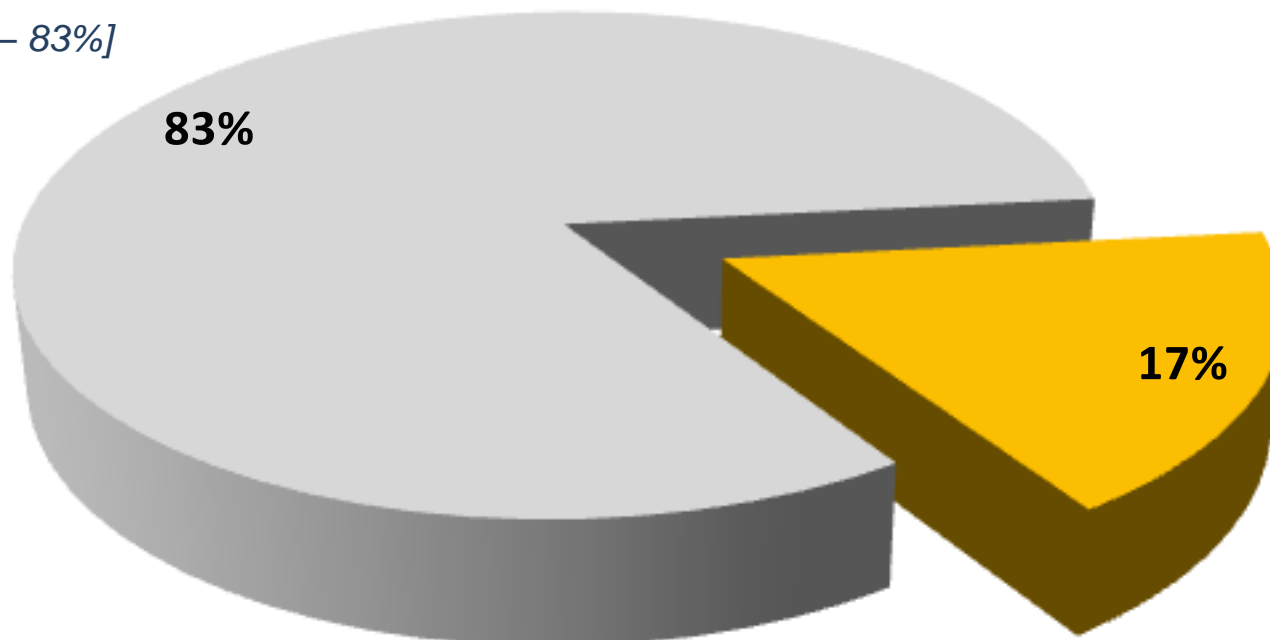


■ Yes - E-mail ■ Yes - Other (mainly telephone) ■ No ■ Do not send post ■ Don't know

Are you aware that traffic fines (e.g. Issued by local wardens) are delivered by another operator (Premiere Post), not MaltaPost?

Sample Size – 500

[2011 – 83%]



[2011 – 17%]

■ Yes ■ No

Have you received any parcels/packages during the last 12 months?

Sample Size – 500

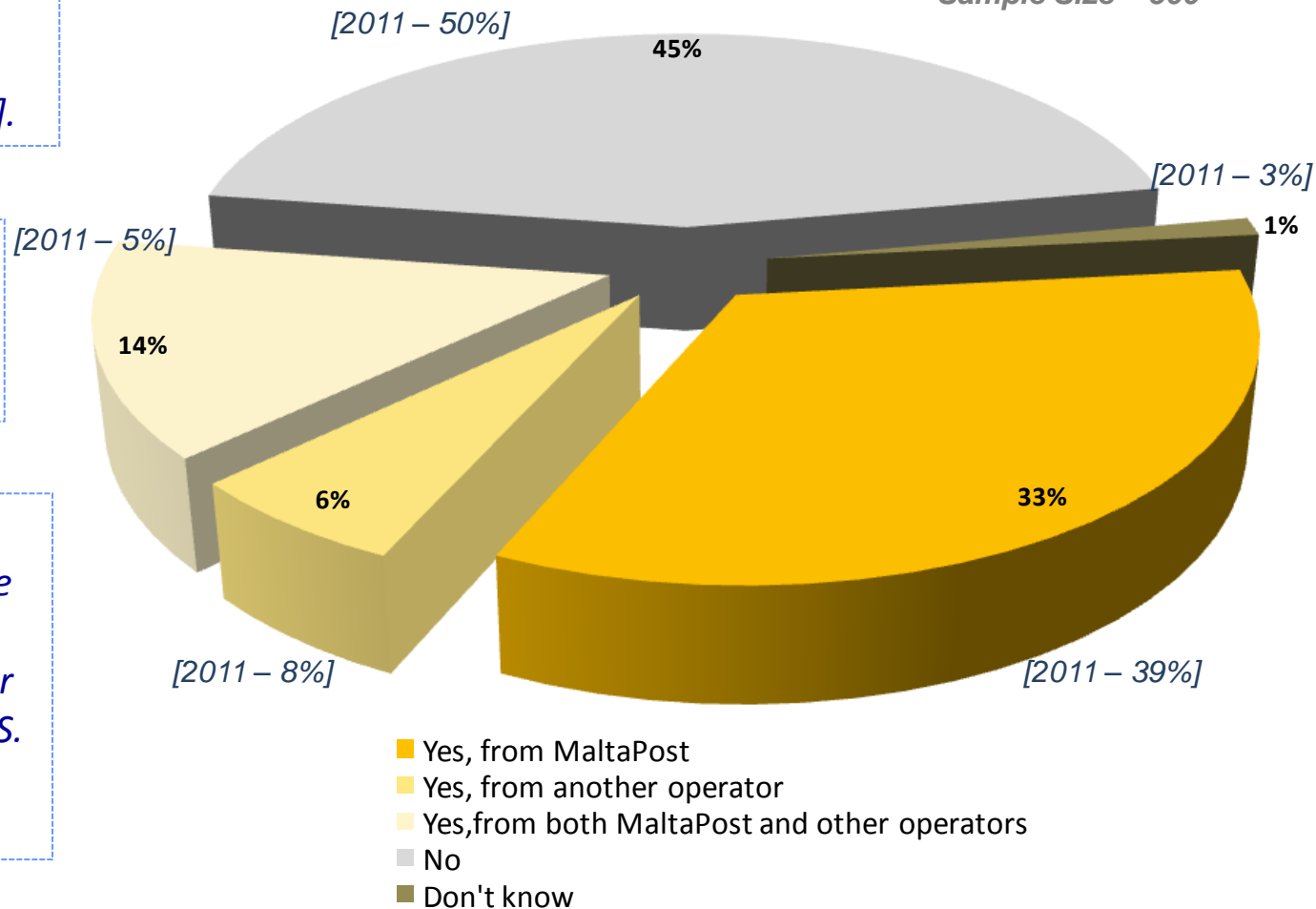
53% of households say they received a parcel during the last 12 months [47% in 2011].



20% of households say the parcel was delivered by an operator; other than MaltaPost [13% in 2011].

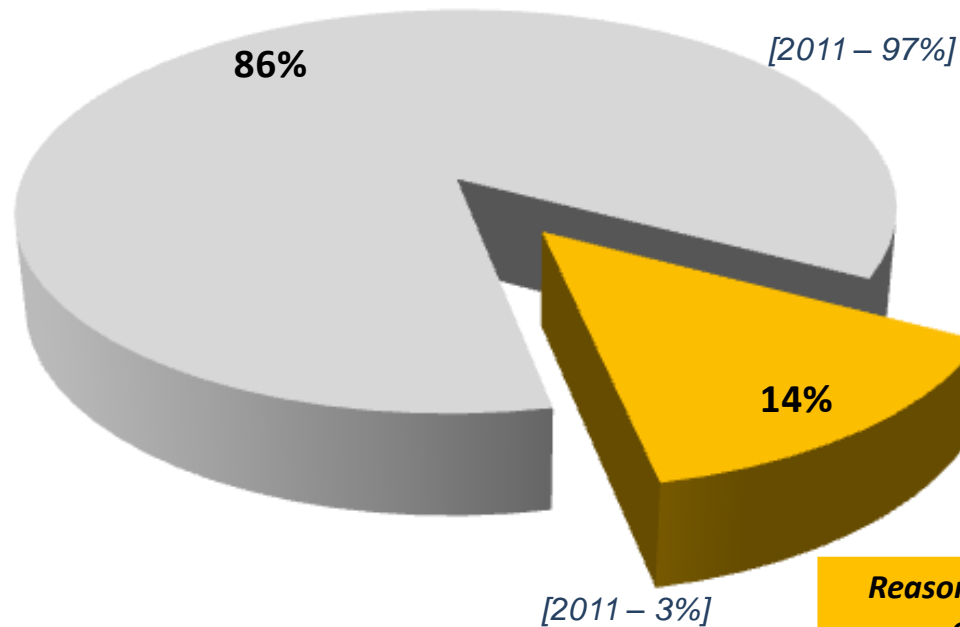


Of this 20%, 41% confirm it was delivered by DHL, while 2% say it was delivered by FedEx. Another 3% say their parcel was delivered by UPS. The rest don't remember which operator it was.



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

Sample Size – 500



53% of households which used other providers to send postal articles mentioned DHL. 6% mentioned UPS while 3% have mentioned FedEx.

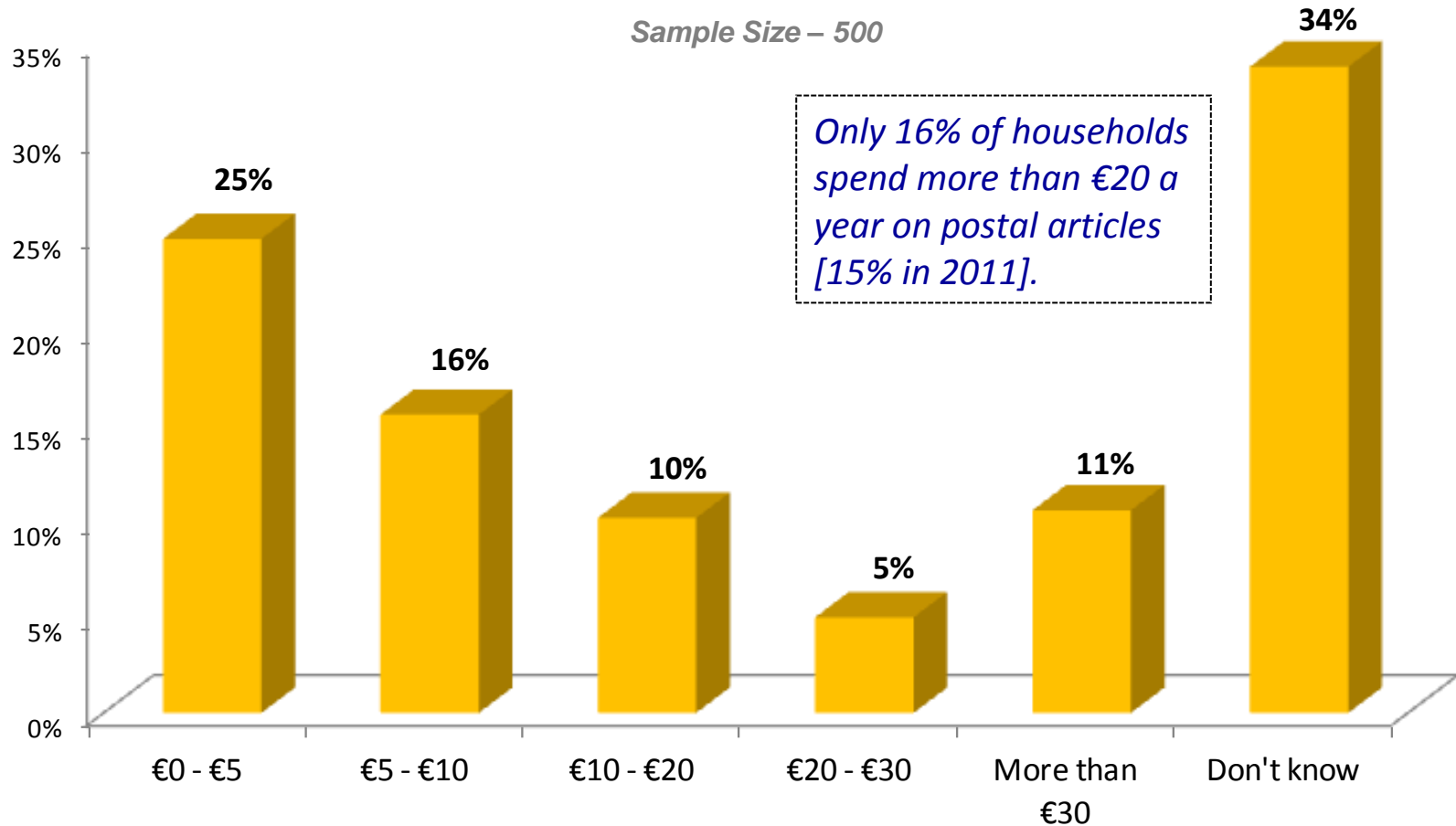
■ Yes ■ No

<i>Reasons stated for using other operators' services</i>	<i>% of Households who used alternative postal operators</i>
More reliable	7%
Cheaper	10%
Faster	47%
Easily Accessible	16%
Other Reasons	7%

Disclaimer: The results show that 14% of households have used other providers besides MaltaPost to send letters and parcels (postal articles). However, it does not show the frequency with which these operators are used.

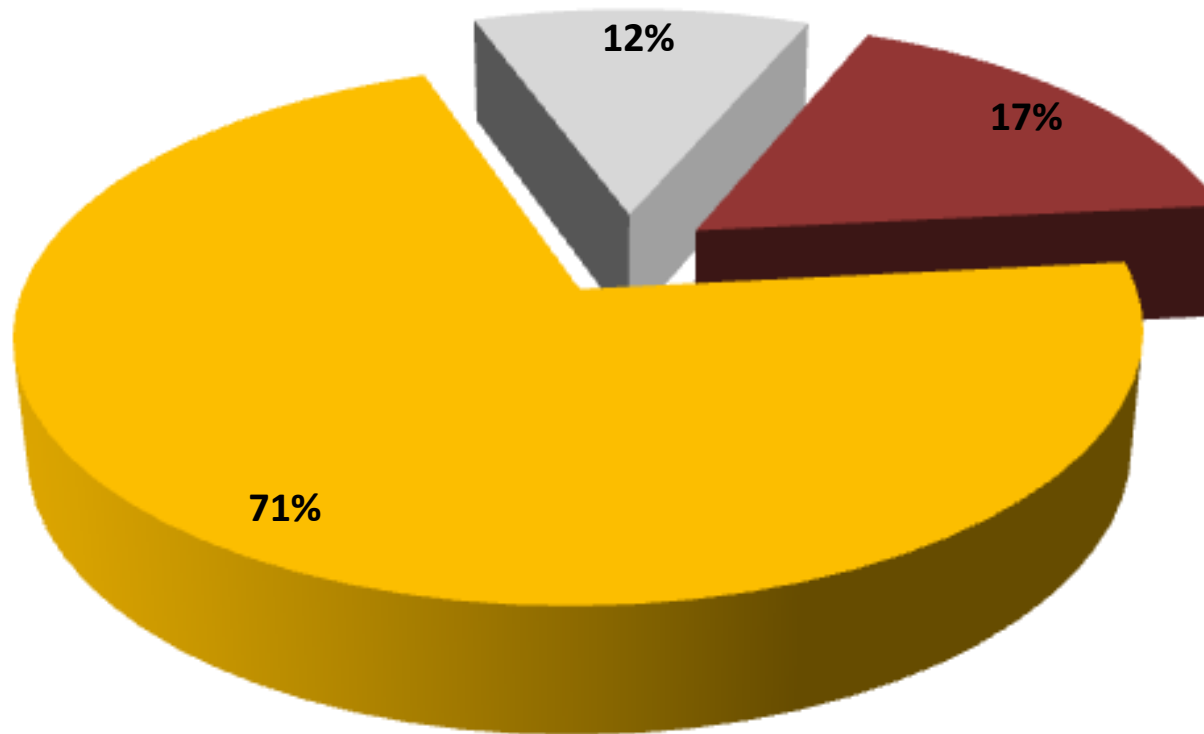
Household Expenditure on Postal Articles

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



Do you write the post-code when sending a postal article e.g. a letter?

Sample Size – 500

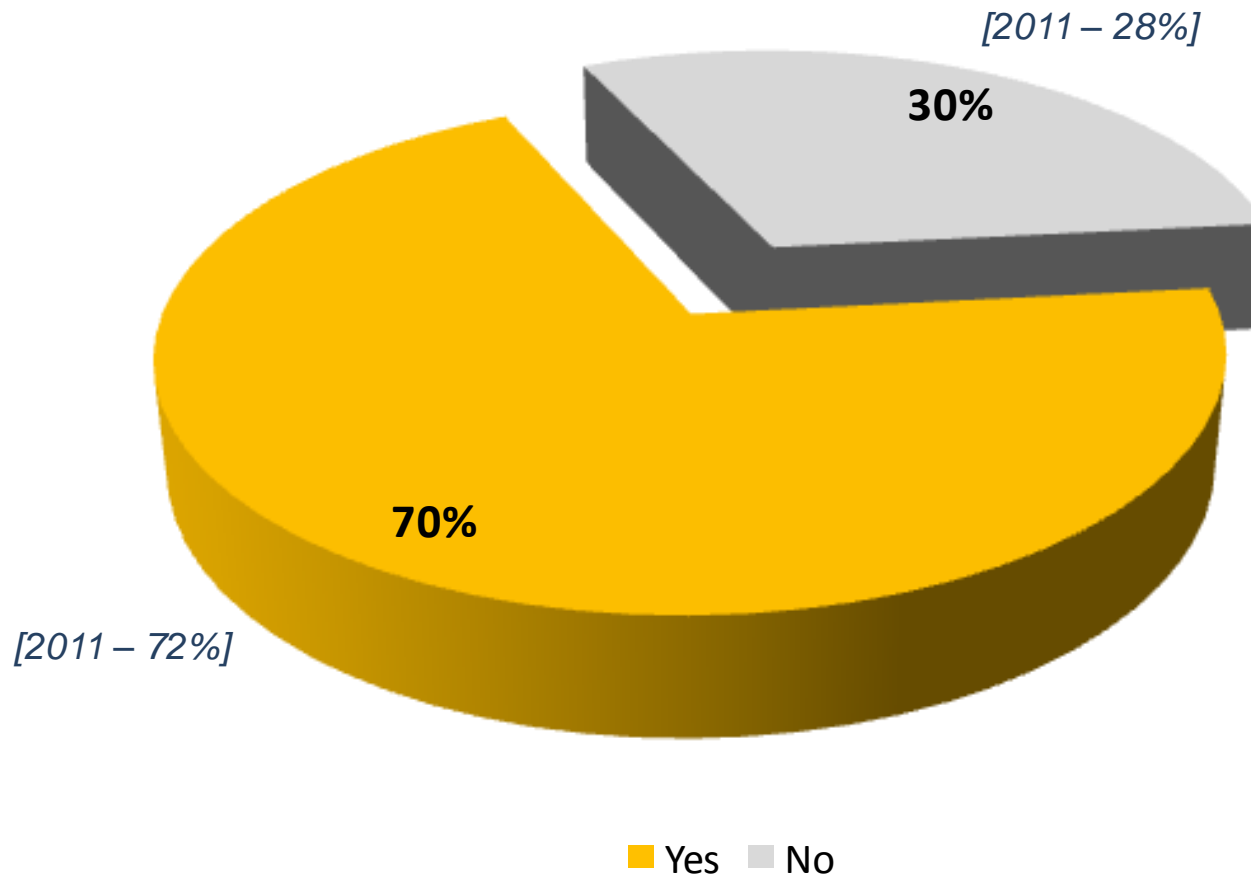


■ Yes ■ No ■ Not always

3. Post Office Services

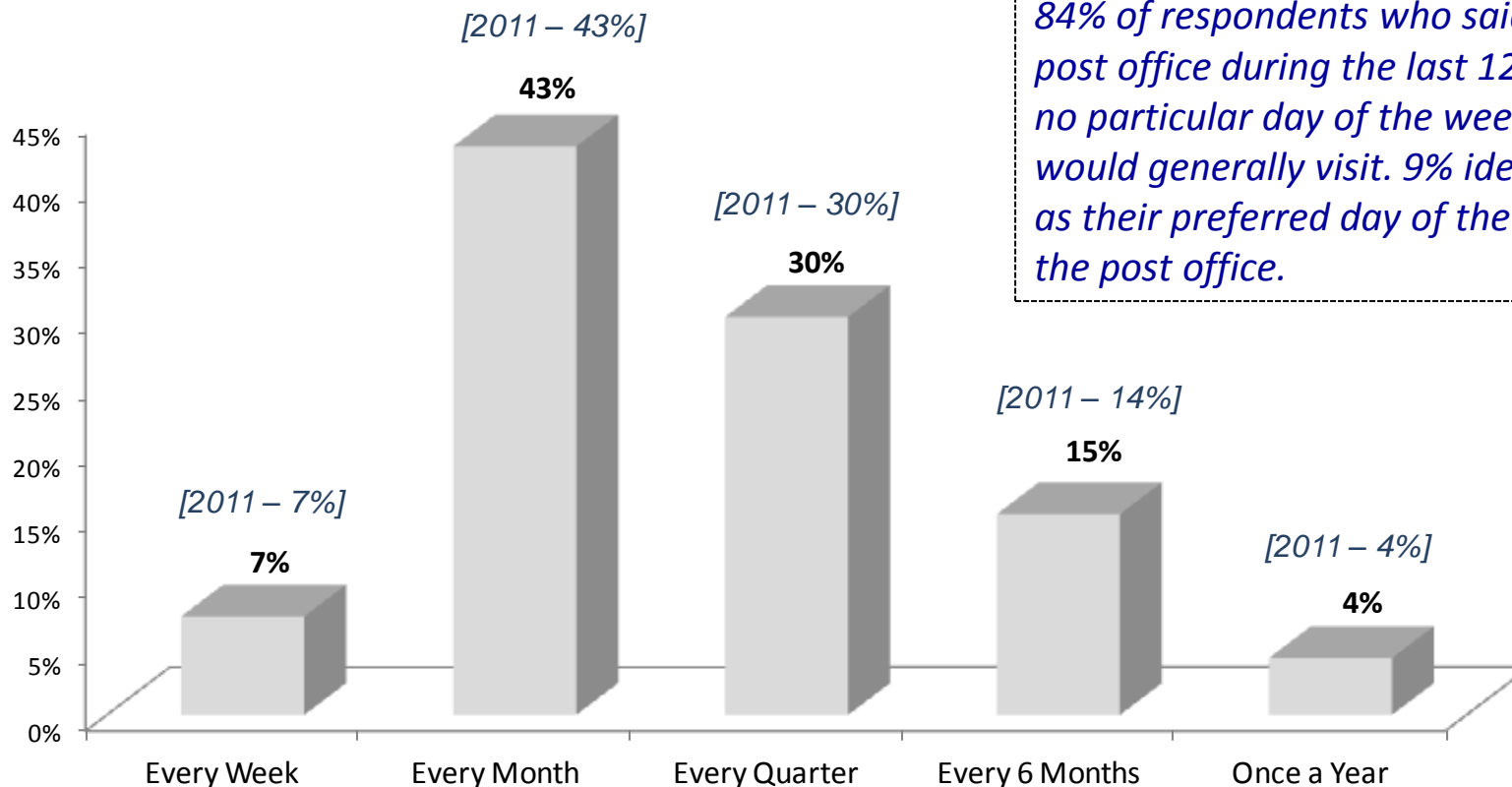
Have you been to the Post Office to use a service during the last twelve months?

Sample Size – 500



How often do you go to the Post Office?

Sample Size – 349



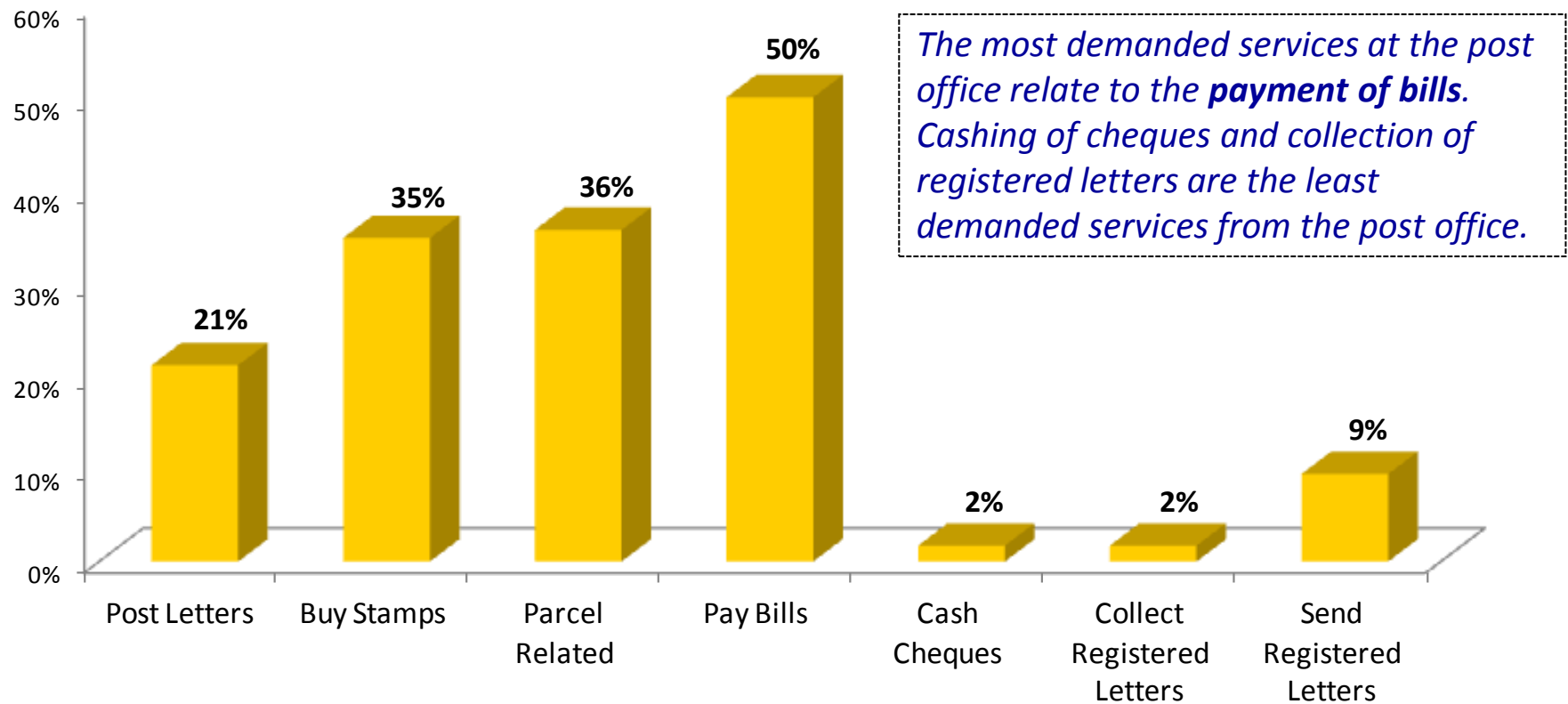
Frequency of visits to the post office remained exactly the same when compared to 2011.

84% of 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. 9% identify Saturday as their preferred day of the week to visit the post office.

What services have been received from the Post Office?

Sample Size – 349

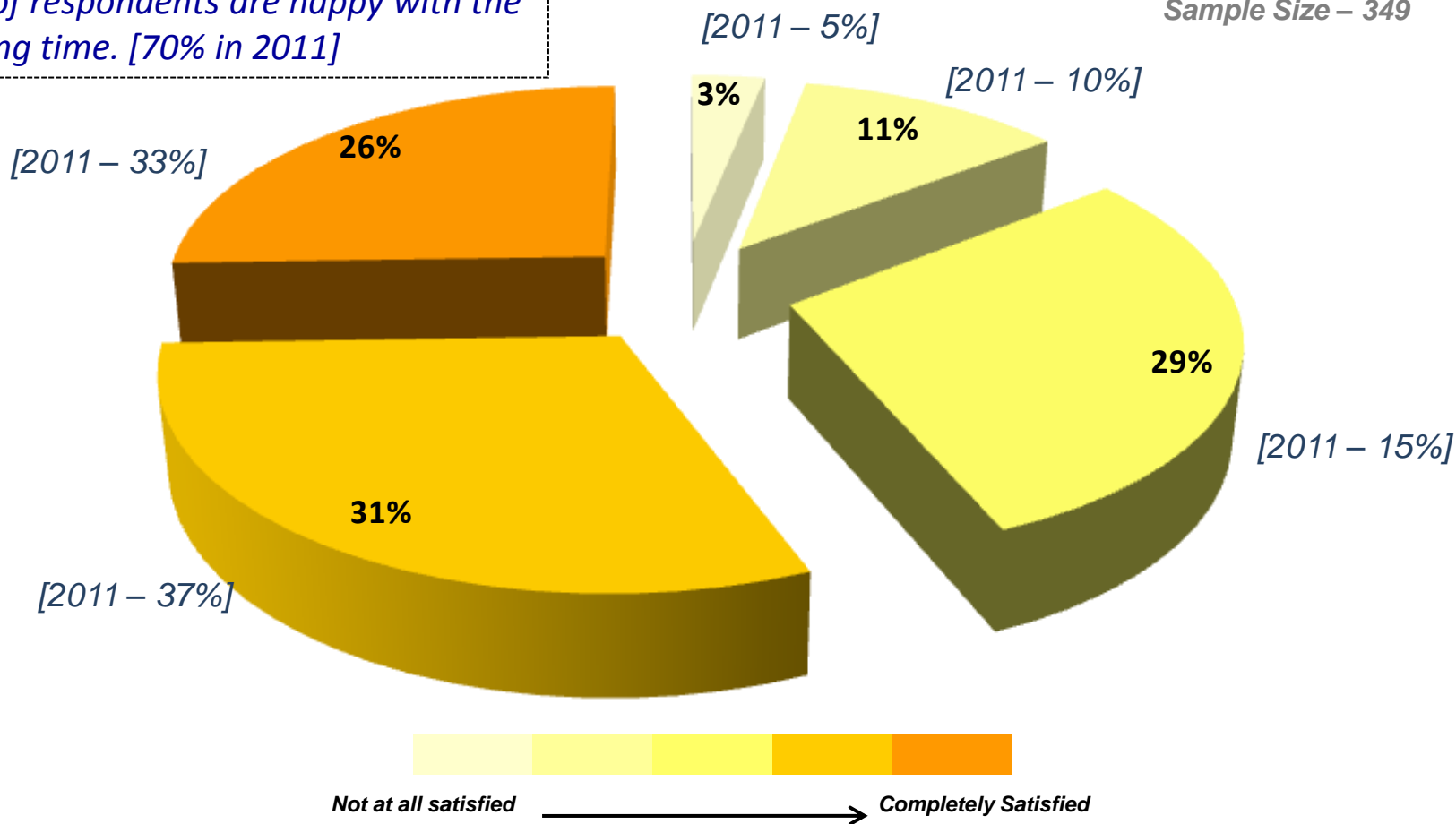
(respondents were prompted and could mention more than one service)



How satisfied are you with the waiting time at the post office ?

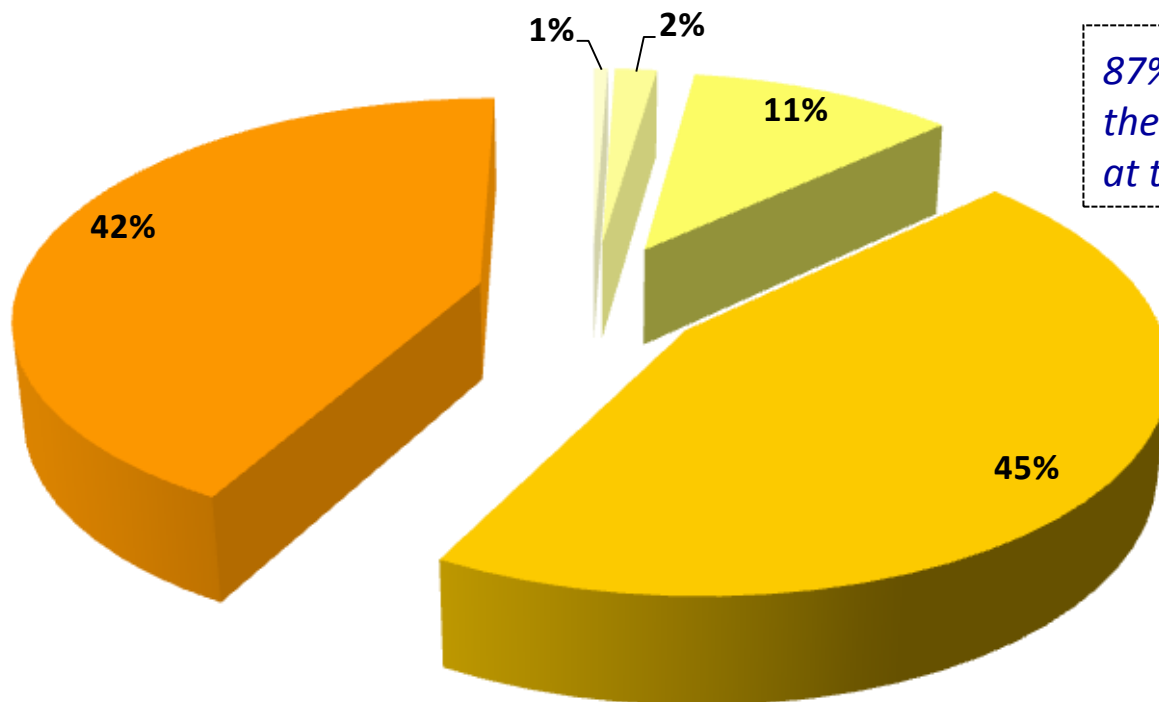
57% of respondents are happy with the waiting time. [70% in 2011]

Sample Size – 349



Are you generally satisfied with the services/facilities provided by the post office ?

Sample Size – 349



87% of respondents are satisfied with the level of services / facilities provided at the post office [90% in 2011].

Of the respondents that are not satisfied with the level of services provided at the post office, the majority (63%) complain about queues .



Not at all satisfied → *Completely Satisfied*

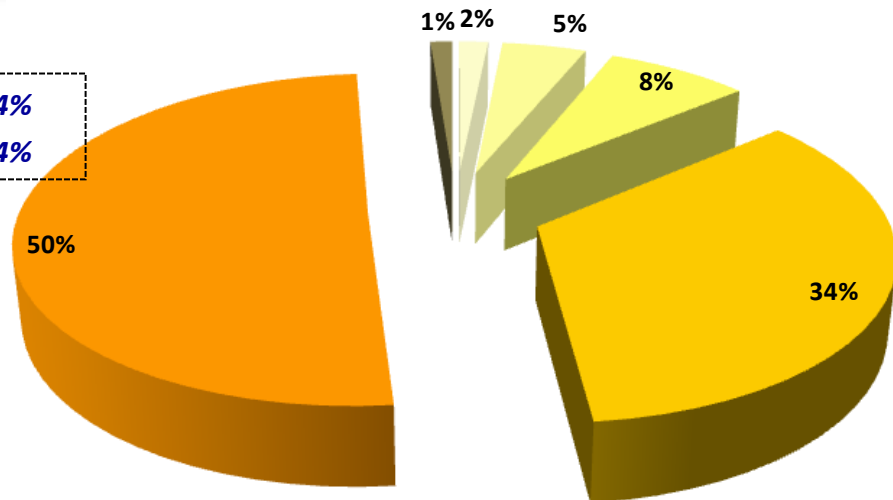
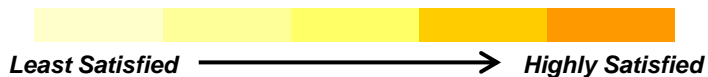
4. Consumer Satisfaction with MaltaPost's Services

The time your post is delivered each day

Sample Size – 500

2011 Satisfaction Levels: **84%**
2014 Satisfaction Levels: **84%**

Don't know

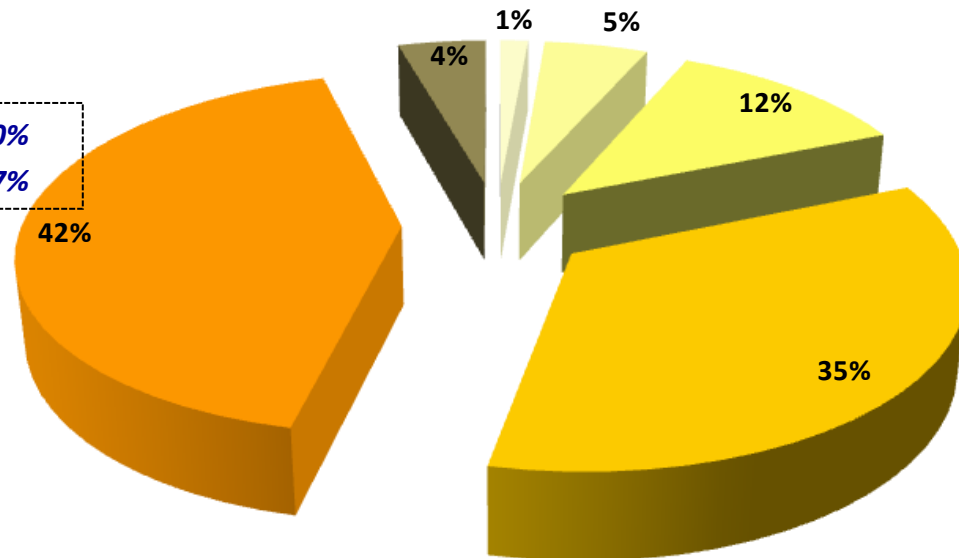
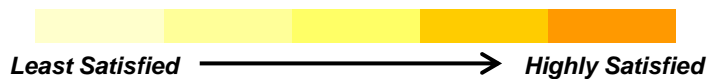


The availability to buy postage stamps

Sample Size – 500

2011 Satisfaction Levels: **80%**
2014 Satisfaction Levels: **77%**

Don't know

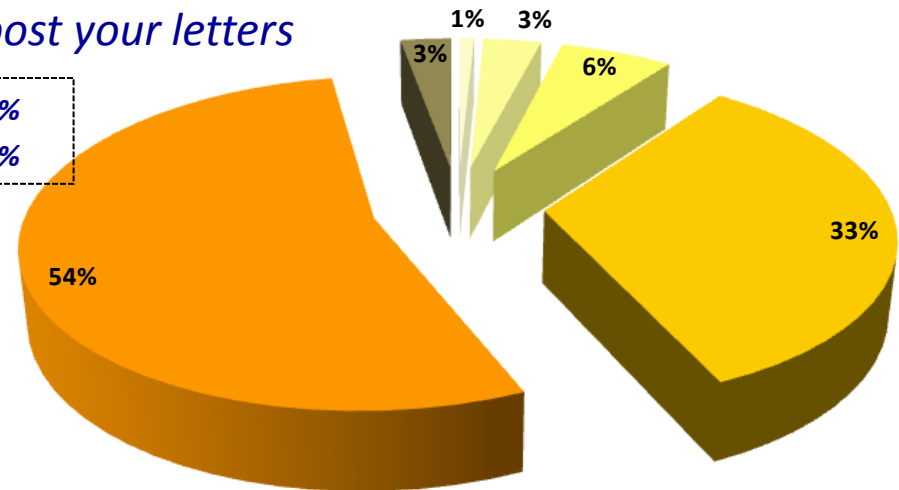
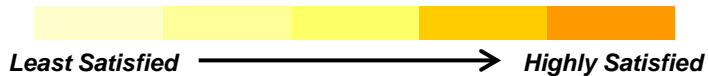


The availability of a letterbox where you can post your letters

Sample Size – 500

2011 Satisfaction Levels: 85%
2014 Satisfaction Levels: 87%

Don't know

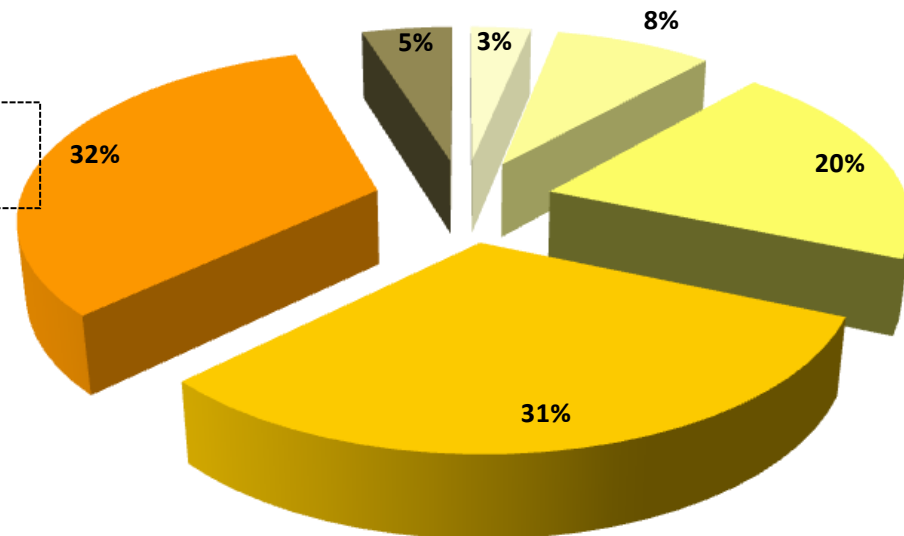
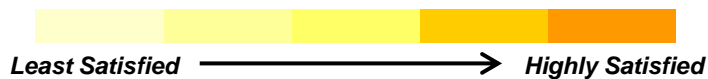


The availability of the post office

Sample Size – 500

2011 Satisfaction Levels: N/A
2014 Satisfaction Levels: 63%

Don't know

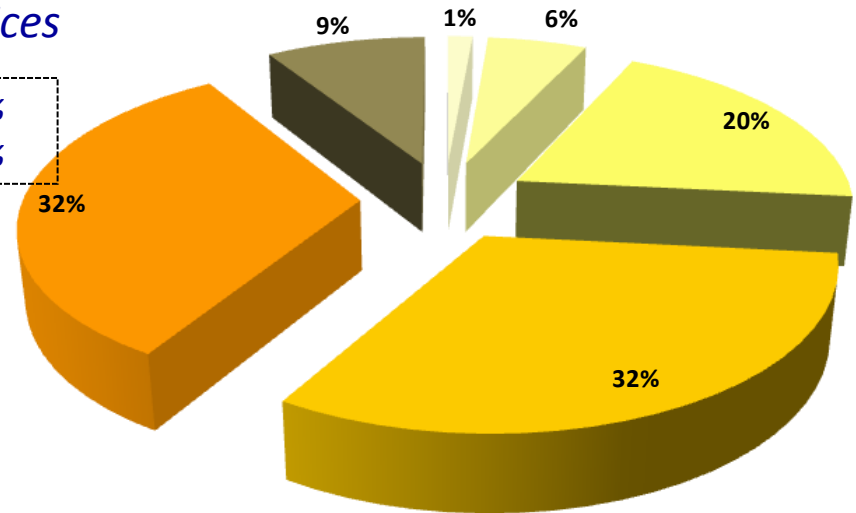
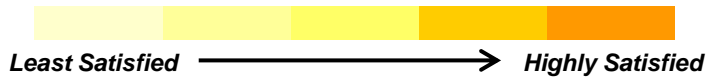


The accessibility to information about the services provided by MaltaPost

Sample Size – 500

2011 Satisfaction Levels: 69%
2014 Satisfaction Levels: 64%

Don't know

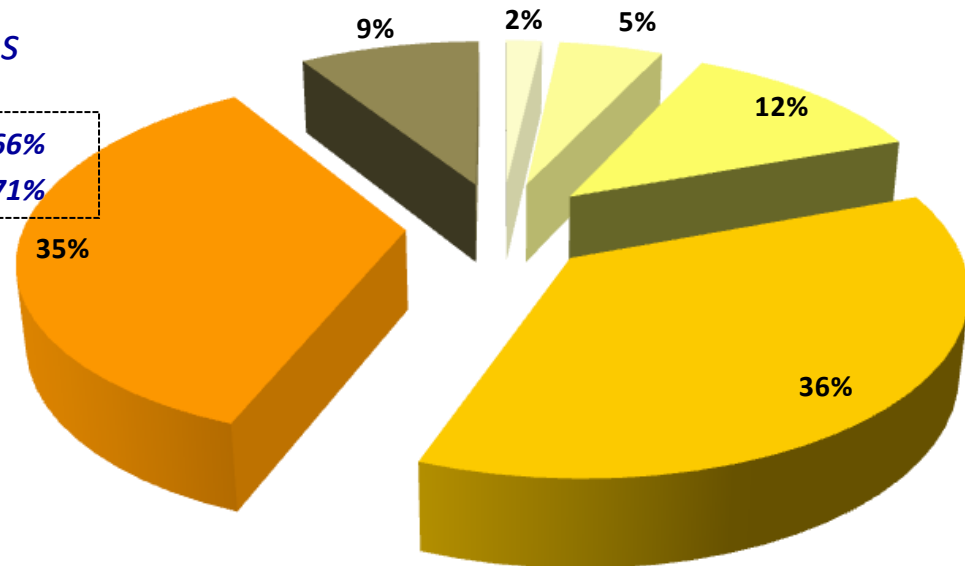
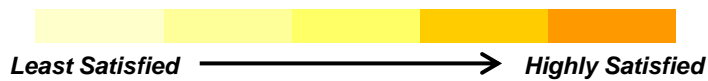


MaltaPost offices' opening and closing times

Sample Size – 500

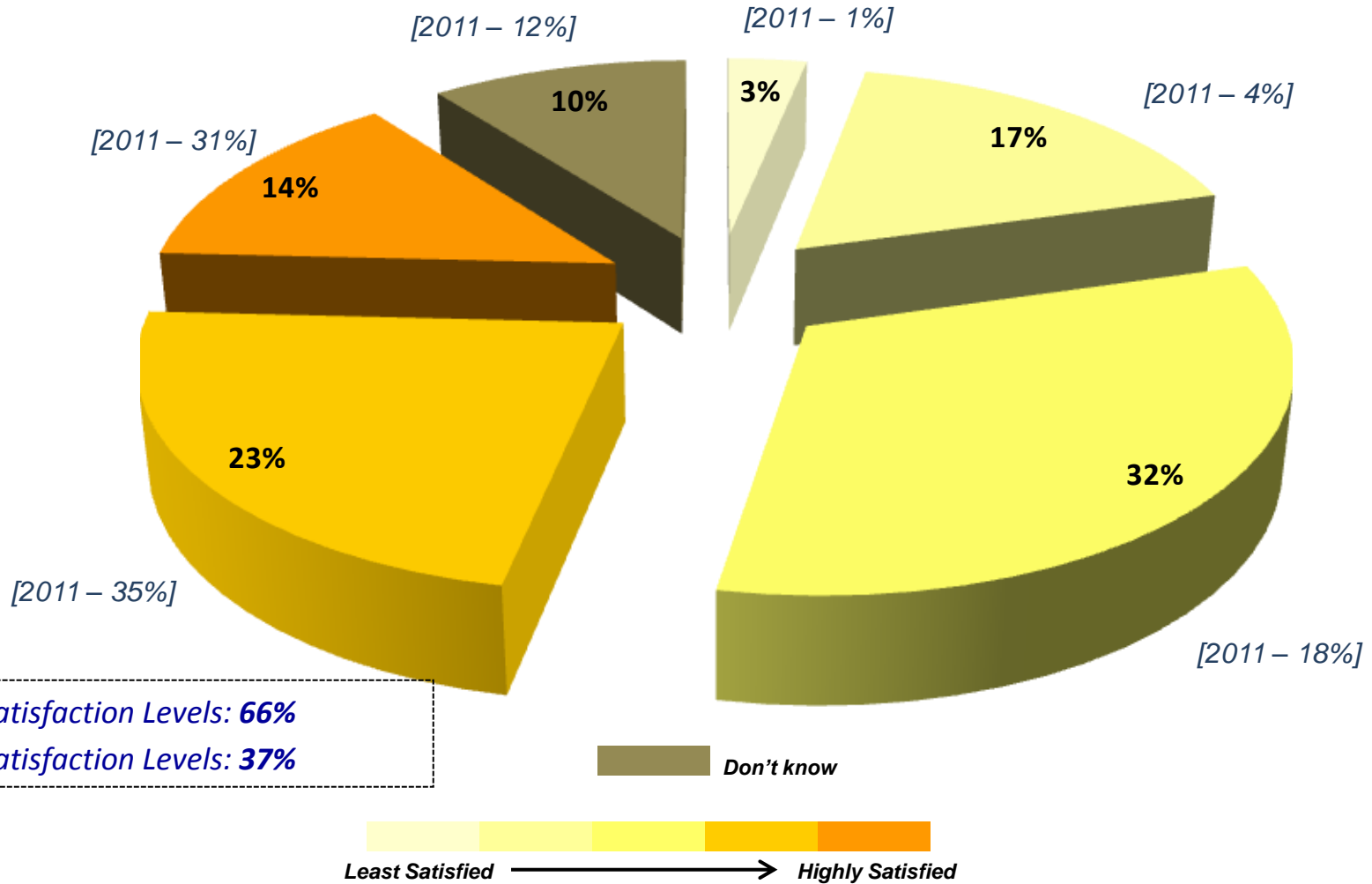
2011 Satisfaction Levels: 66%
2014 Satisfaction Levels: 71%

Don't know



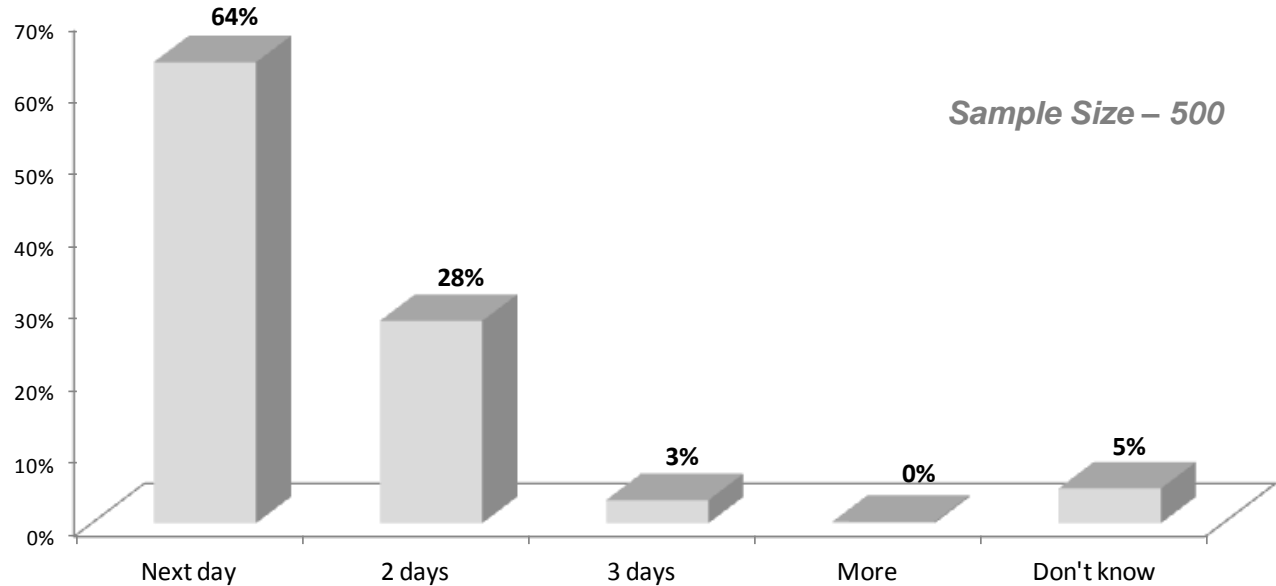
The prices of postal services (in general)

Sample Size – 500



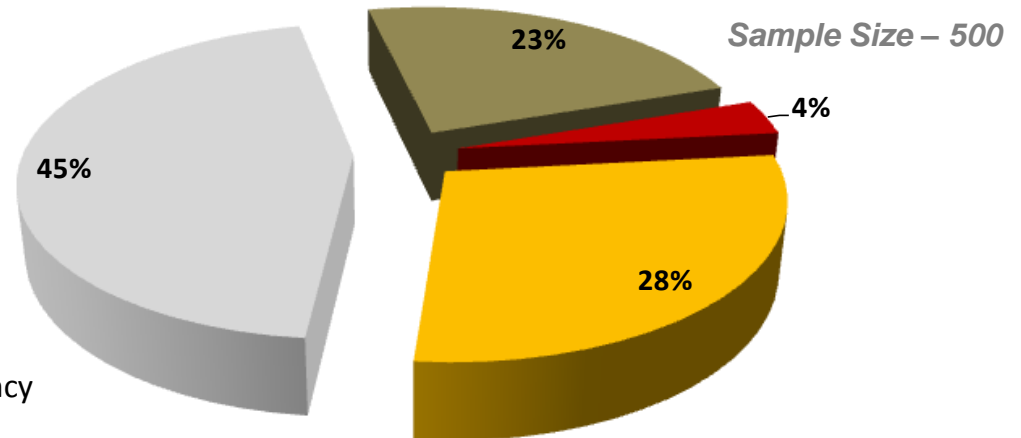
2011 Satisfaction Levels: 66%
2014 Satisfaction Levels: 37%

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

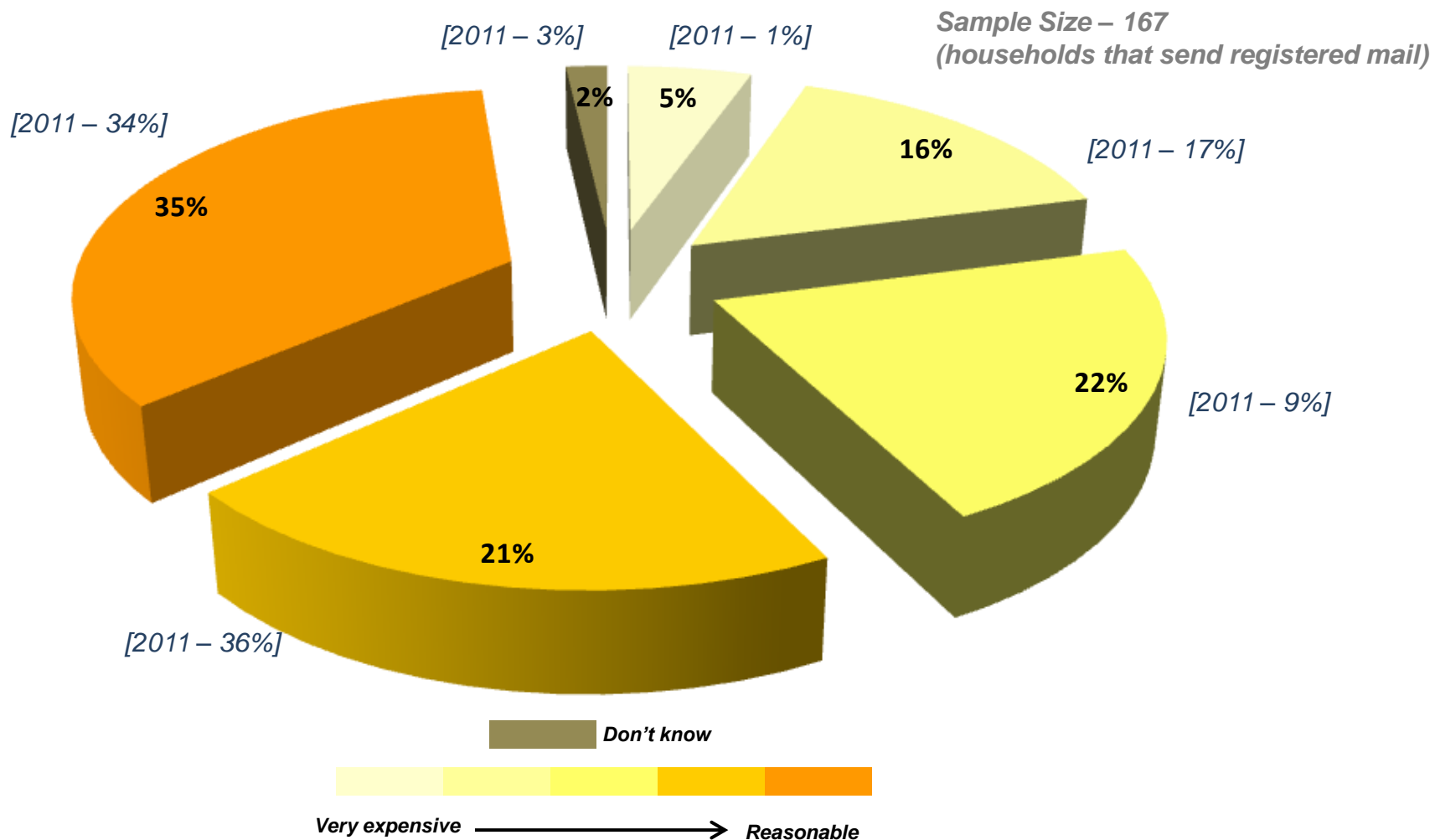


Would you opt for a service which is cheaper/discounted in exchange for deferred delivery, whereby your postal article is then delivered after 3 days instead of next day?

■ Yes
 ■ No
 ■ Don't Know
 ■ Depending on urgency



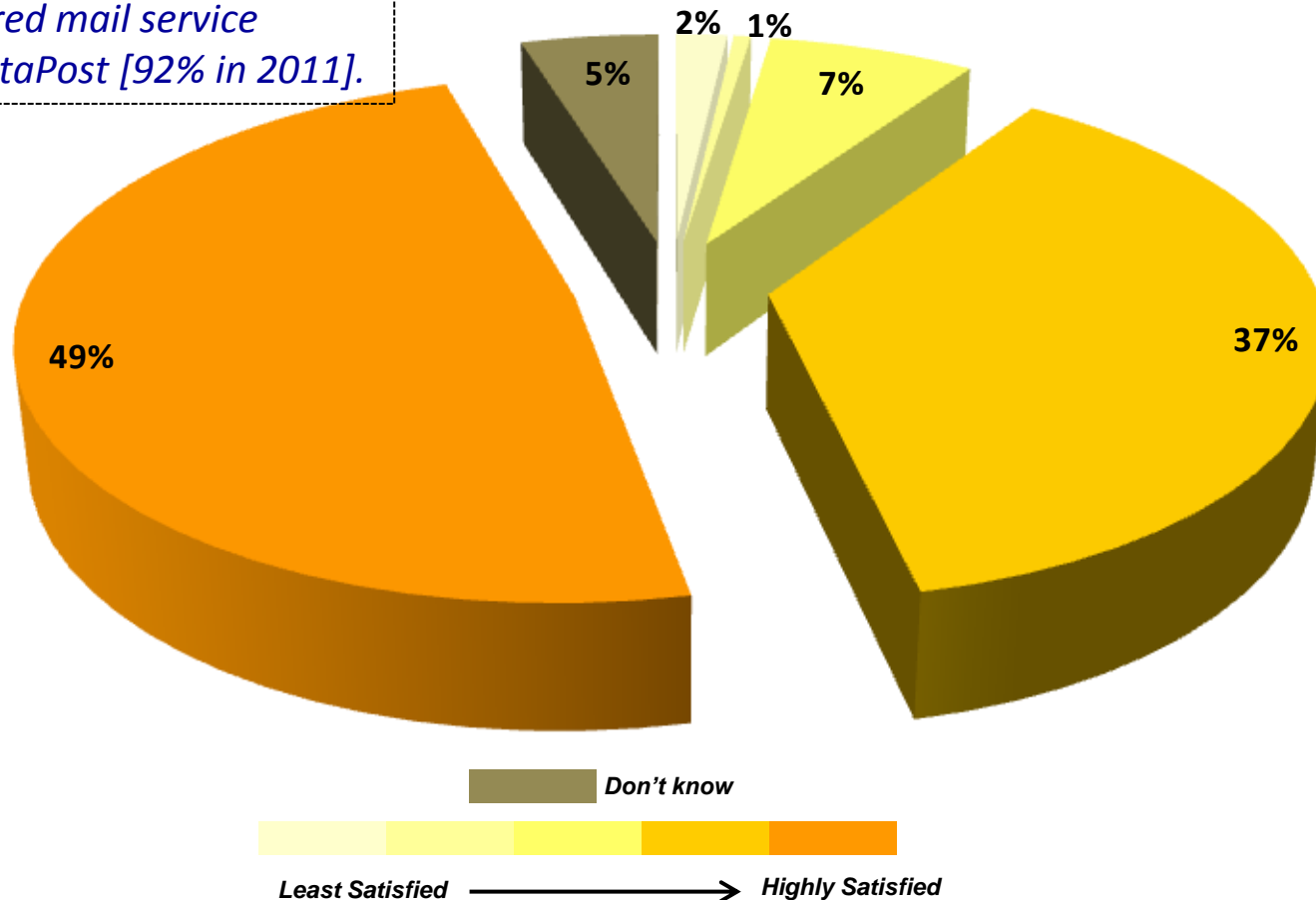
How expensive / reasonable do you find the prices of registered mail?



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

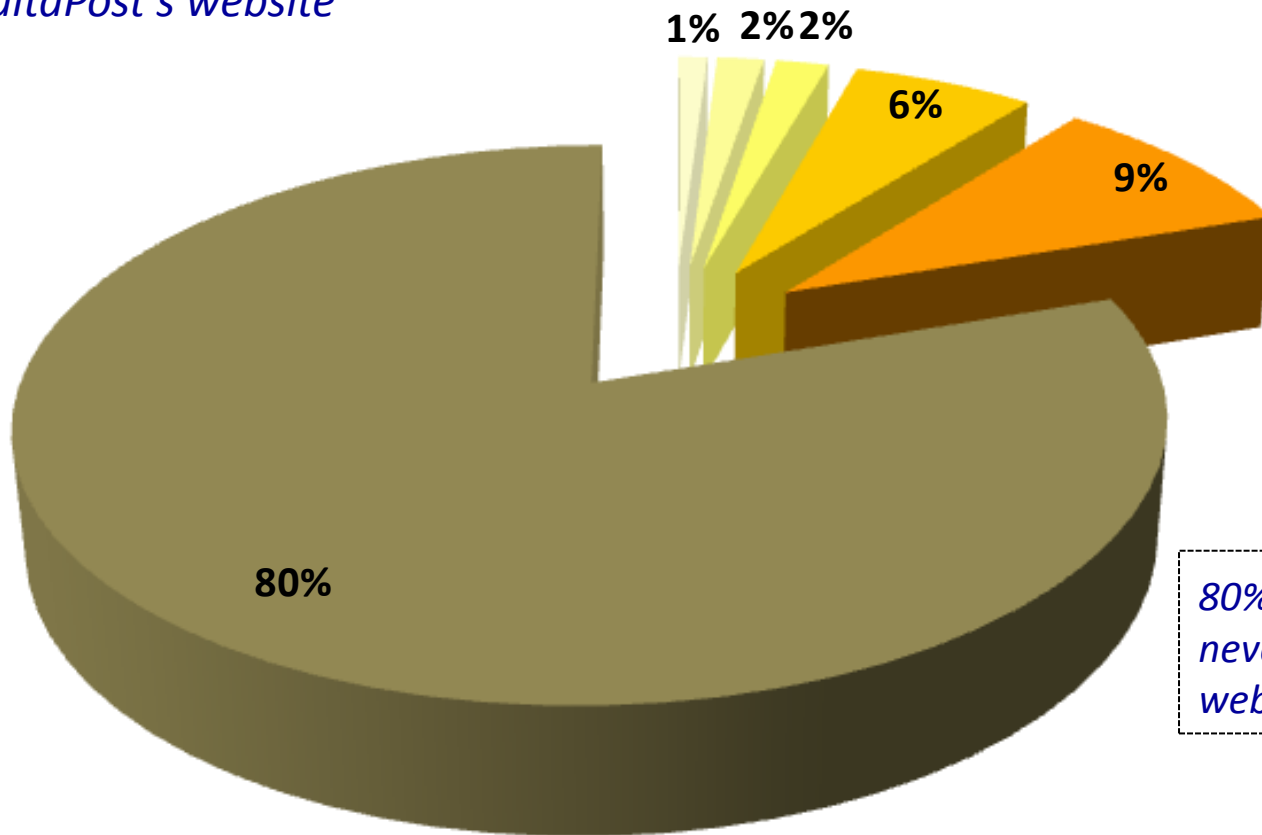
86% are satisfied or highly satisfied with the registered mail service provided by MaltaPost [92% in 2011].

Sample Size – 167
(households that send registered mail)

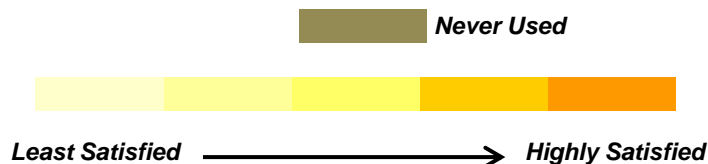


MaltaPost's website

Sample Size – 500

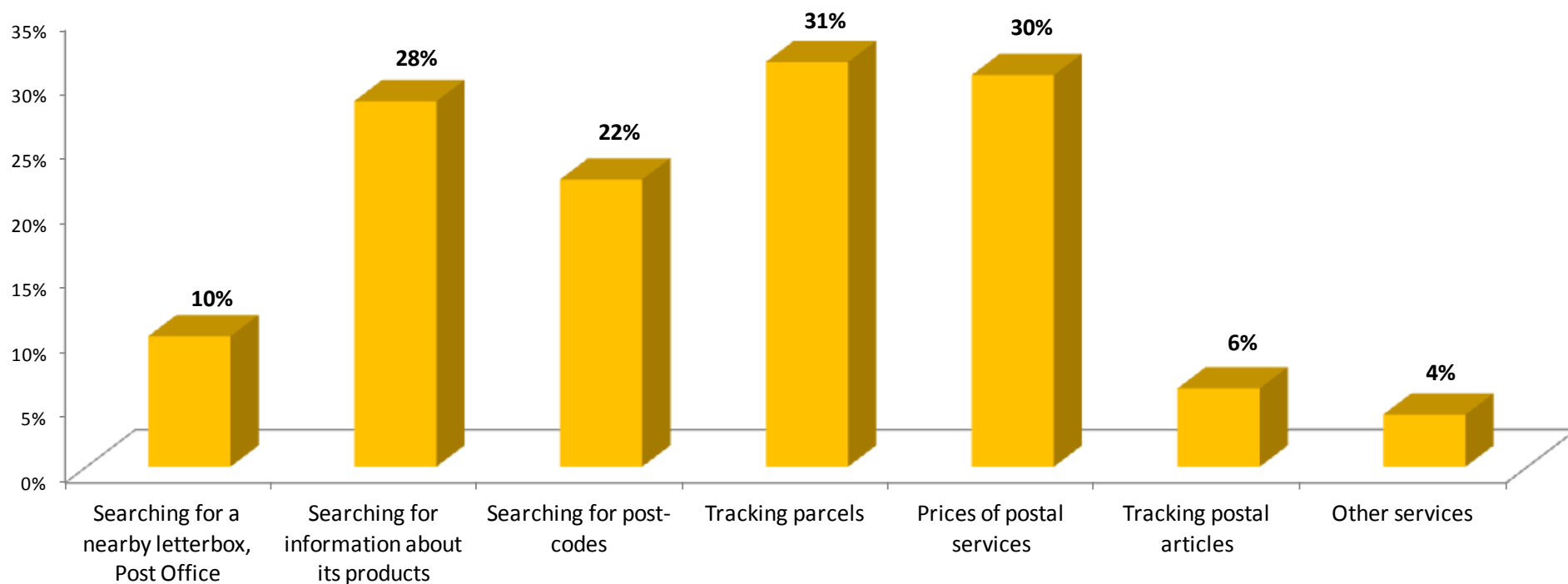


80% of households claim to have never used the MaltaPost's website. [85% in 2011]



What is/are the main reason(s) for using MaltaPost's website?

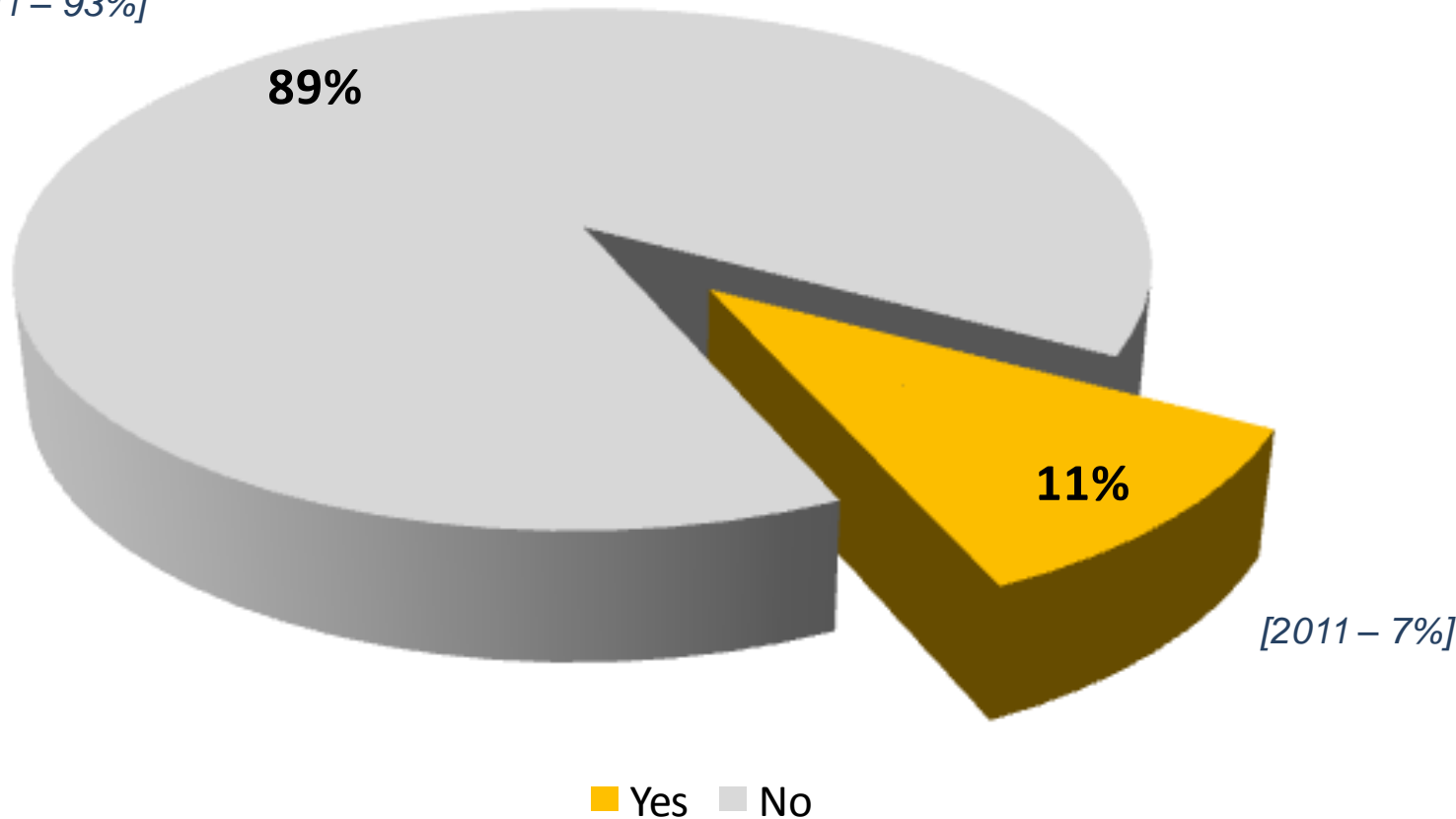
Sample Size – 99 households claiming to have used the website
(respondents could give more than one reason)



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?

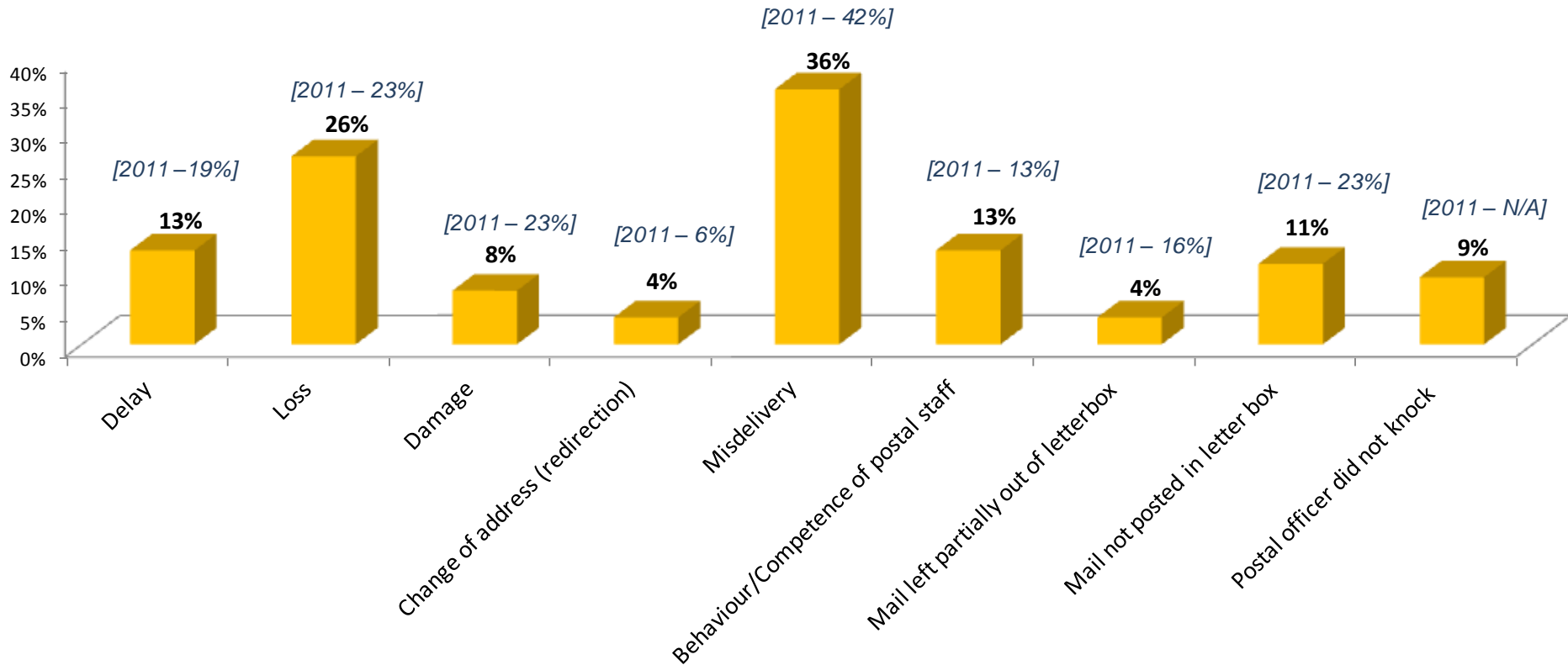
Sample Size – 500

[2011 – 93%]



What was the complaint about?

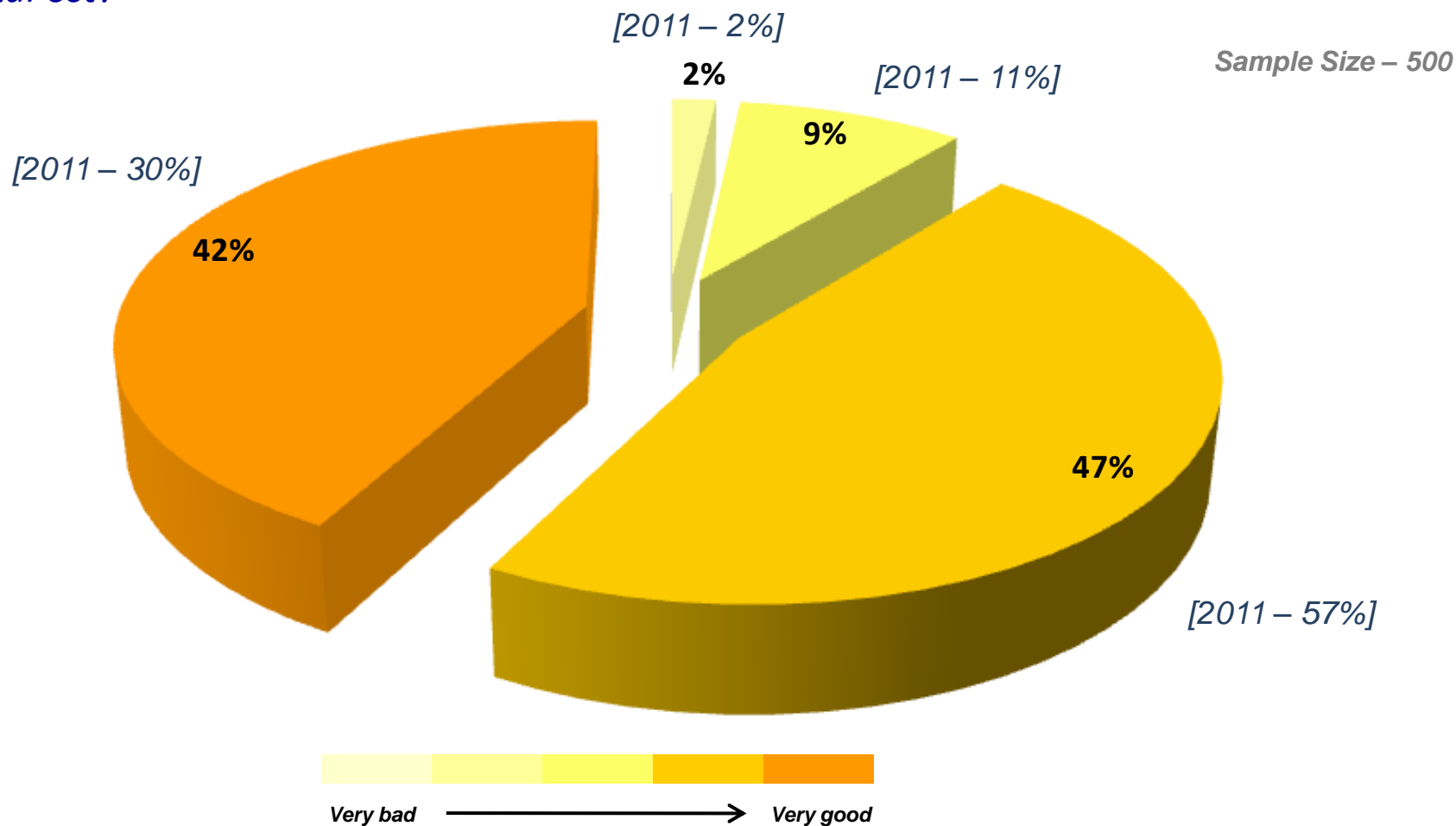
Sample Size – 53
(each respondent could give more than one reason)



Only 28% of households who had made a formal complaint with MaltaPost were satisfied or highly satisfied with the way their complaint had been handled [54% in 2011].

Overall Satisfaction with MaltaPost Services

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



5. Main Highlights

- Postal volumes continued to fall over the past twelve months. The majority of households however still claim to have received and sent the same volumes of addressed letters
- Households that have reduced the number of addressed letters they sent claim to have resorted to other alternatives, namely emails and eCommerce
- Moreover, 38% of households say they would switch to non-postal alternatives if the price of addressed letters were to increase by 5% - 10%
- 53% of households say they received a parcel during the last 12 months [47% in 2011]
- 20% say the parcel was delivered by an operator; other than MaltaPost [13% in 2011], of which 41% confirm it was delivered by DHL
- Interestingly, 14% of households claim to have used other operators besides MaltaPost to send postal articles
- 47% claim to have used these operators because they provide a faster service. 16% say they are easily accessible
- 71% of households write the post-code when sending a postal article

- 51% of households spend less than €20 a year on postal services. Furthermore, 34% don't know how much they spend probably because they use no or very little postal services
- Frequency of visits to the post office remained exactly the same when compared to 2011
- 84% of 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. 9% identify Saturday as their preferred day of the week to visit the post office
- The most demanded service at the post office relate to the payment of bills
- Satisfaction levels with the waiting time at the post office fell from 70% in 2011 to 57% in 2014
- Satisfaction levels with the services / facilities provided at the post office fell slightly to 87% from 90% in 2011
- 63% of households that are not satisfied with the level of services provided at the post office complain about queues – also reflects the drop in waiting time satisfaction levels
- Only 37% are satisfied with the general price levels of MaltaPost. This contrasts with 66% in 2011

- 56% of households having used MaltaPost to send a registered letter say the prices are reasonable. 86% are satisfied with the registered letter mail service provided by MaltaPost
- The majority (64%) of households expect postal articles should be delivered on a next day basis
- At the same time, 28% of households claim that they would opt for a service which is cheaper in exchange for deferred delivery. 45% say they would not opt for such a service, 4% say that it depends on the urgency of the postal article being sent
- 80% of households claim to have never used MaltaPost's website [85% in 2011]
- The number of formal complaints with MaltaPost grew marginally from 7% in 2011 to 11%
- Only 28% of households who had made a formal complaint with MaltaPost were satisfied with the way their complaint had been handled [54% in 2011]



Thank You