

MCA Market Research

Postal Services – Household Survey Results

Published 25th February 2019

Assess the extent of household satisfaction with postal services

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

Provide for better regulatory decisions

EMCS Ltd carried out the survey between July & August 2018 on behalf of the MCA

Fieldwork

- Interviews were carried out by telephone lasting around 20 minutes
- The survey respondents were chosen randomly from a range of GO fixed telephone numbers
- Only one person per household was interviewed. 107 of respondents were in the 18-29 age group, 153 were 30-49 years old, 127 were 50-64, and 113 were above 65, for a total sample size of 500.

Sample

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

Responses

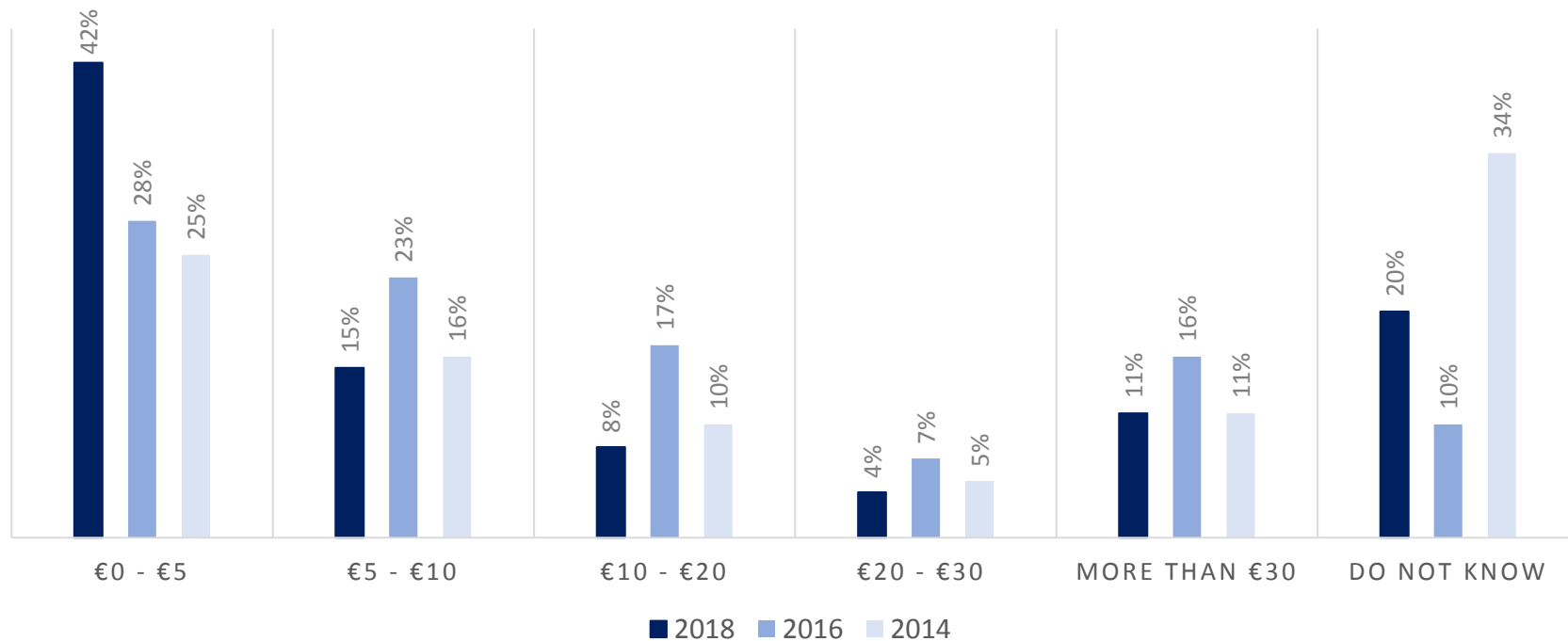
- 500 net respondents
- Any refusals / incomplete surveys were re-allocated to achieve a net sample of at least 500 interviewees
- Margin of error +/- 4.38% at 95% confidence interval.

Postal Activity in Maltese Households

Money Spent on Posting Articles During the Past Twelve Months

Number of Respondents: 500

Household spending on posting articles is falling over time, with 42% of respondents spending less than €5 in 2018 in comparison to just 28% in 2016.

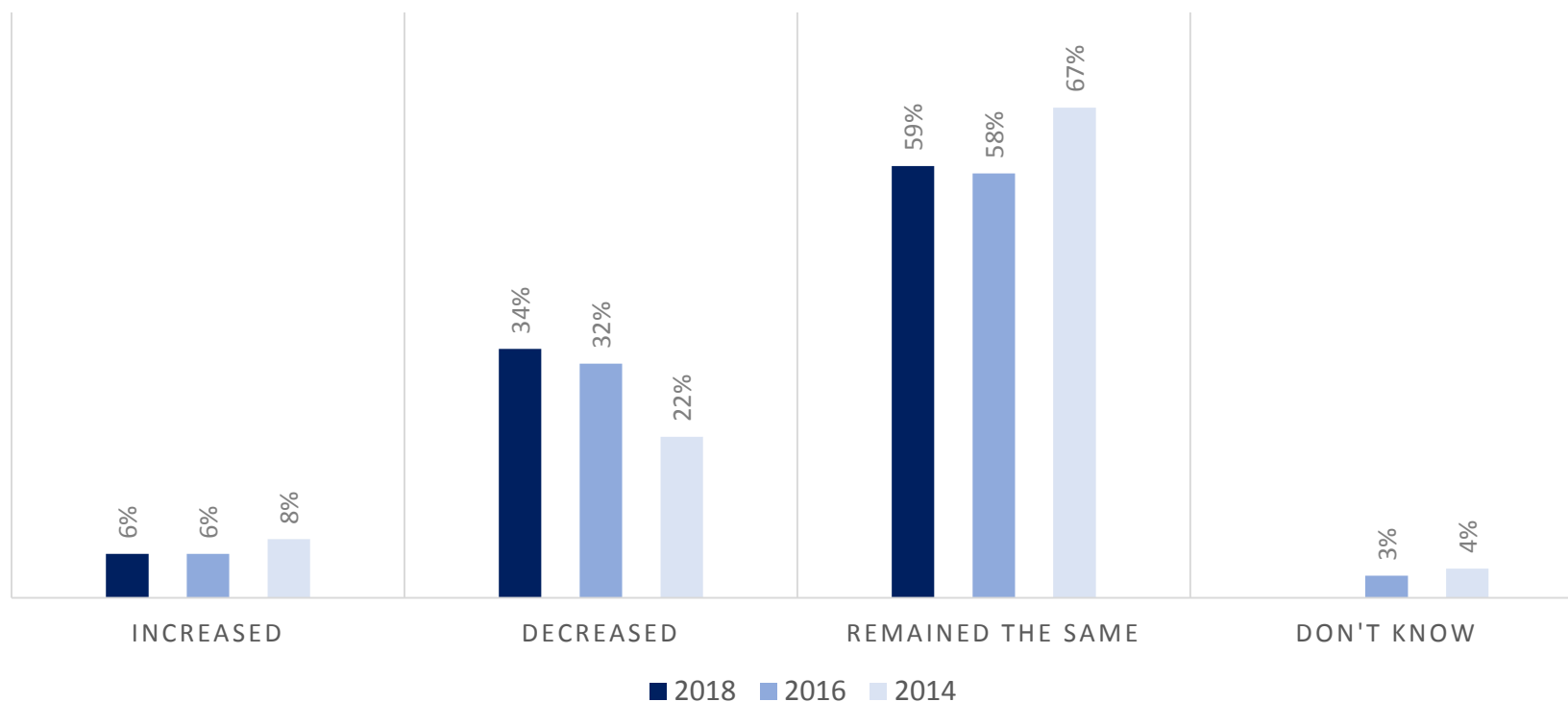


Letter Mail

Number of Letters Received Each Week

Number of Respondents: 500

59% of respondents report the number of addressed letters received per week to have remained the same over the 12-month period.

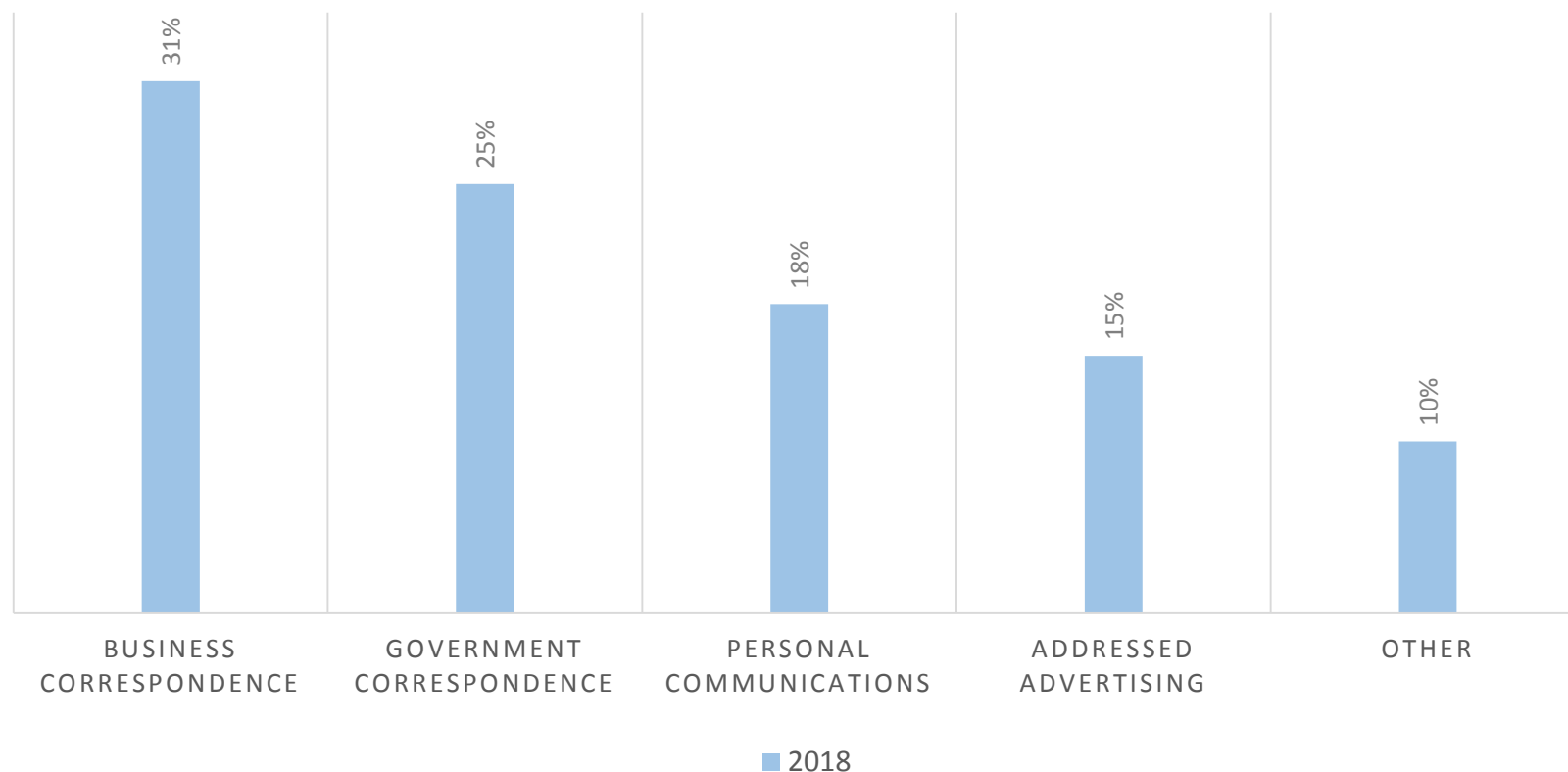


Type of Letter Correspondence Received

Number of Respondents: 493

(The respondents ranked the type of letter mail sent by most often to least often. These data were then weighted for the analysis.)

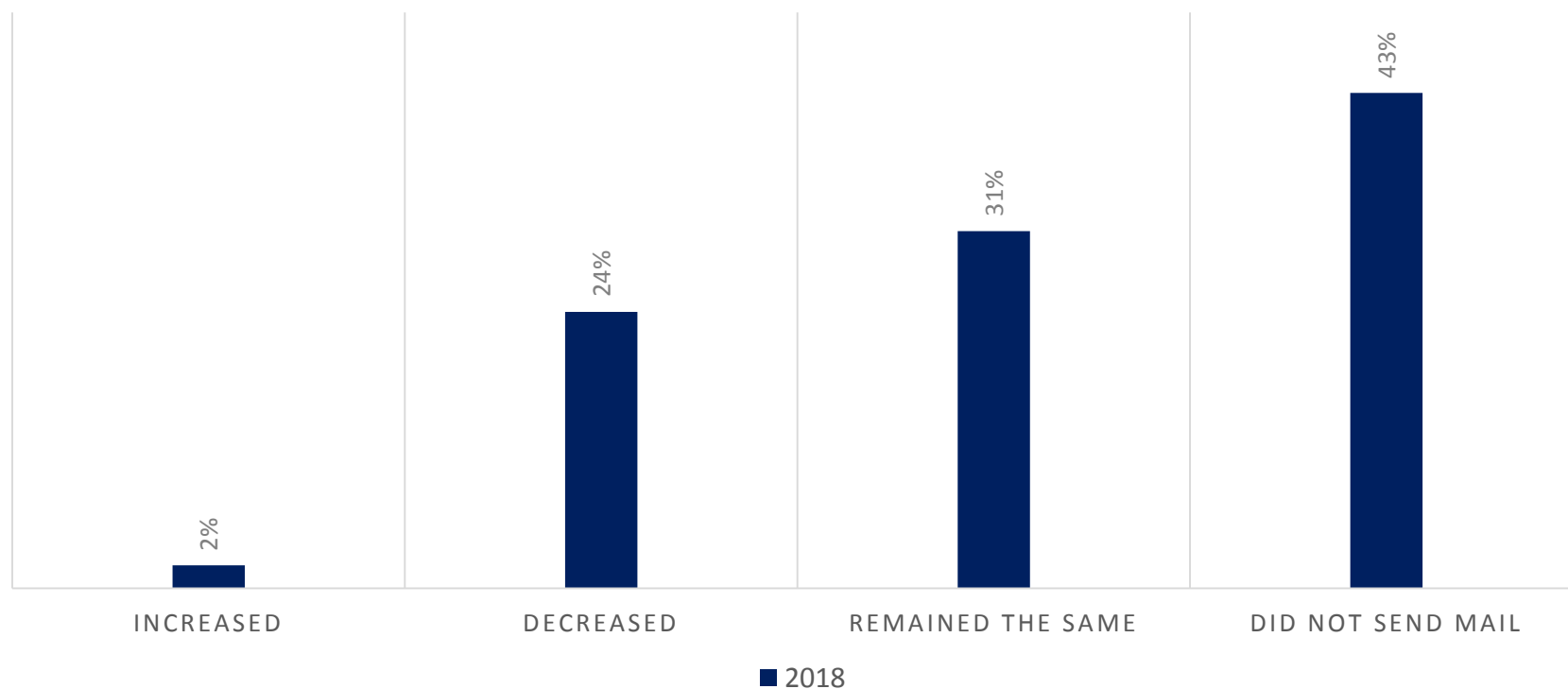
Business and government correspondence remain the most commonly received letter type.



Number of Letters Sent

Number of Respondents: 500

43% of households have not sent any mail over the past 12 months. Only 2% report increases in the number of letters sent.

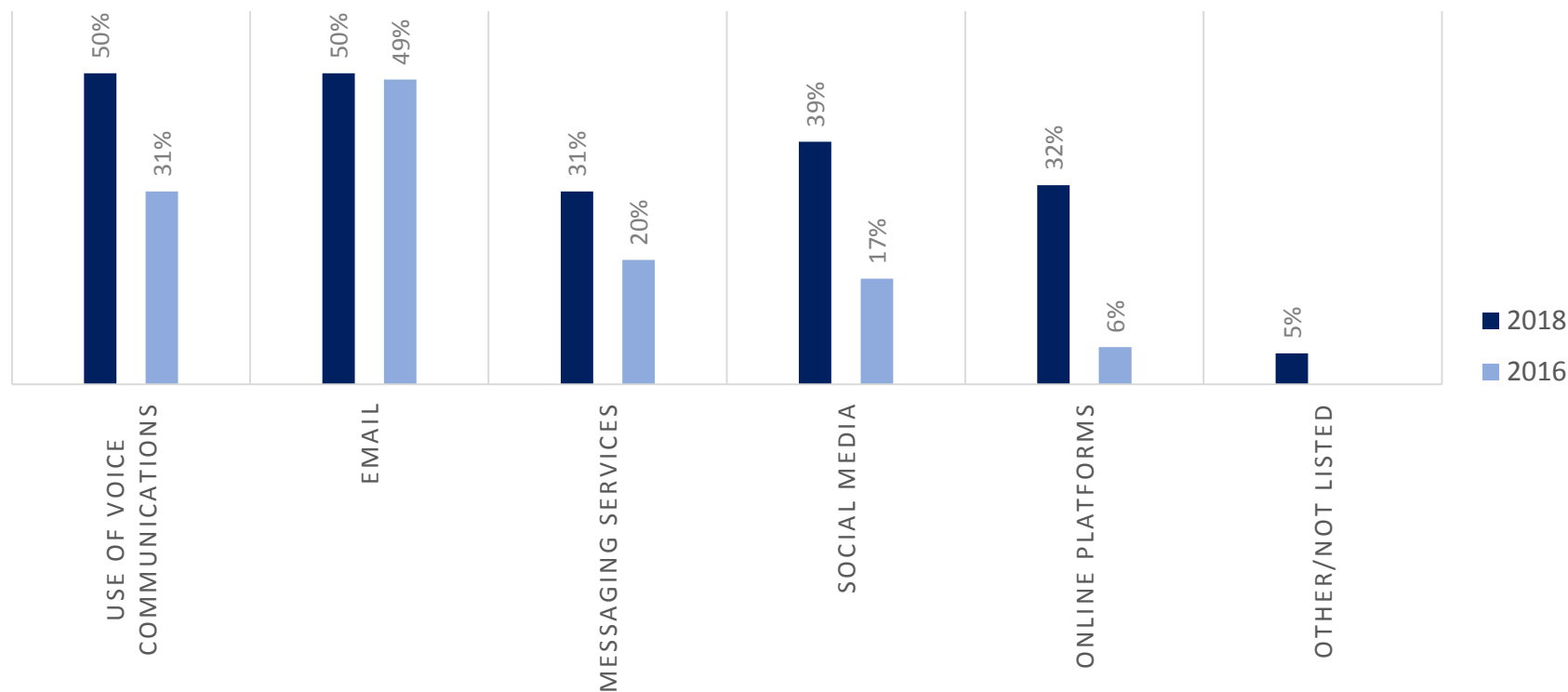


Reasons for Decrease in Letters Sent

Number of Respondents: 119 (2018), 187 (2016)

(Question was asked to those who answered 'decreased' in previous question. Respondents could give multiple responses.)

Voice communications and email are substitutes to declining letter mail volumes.

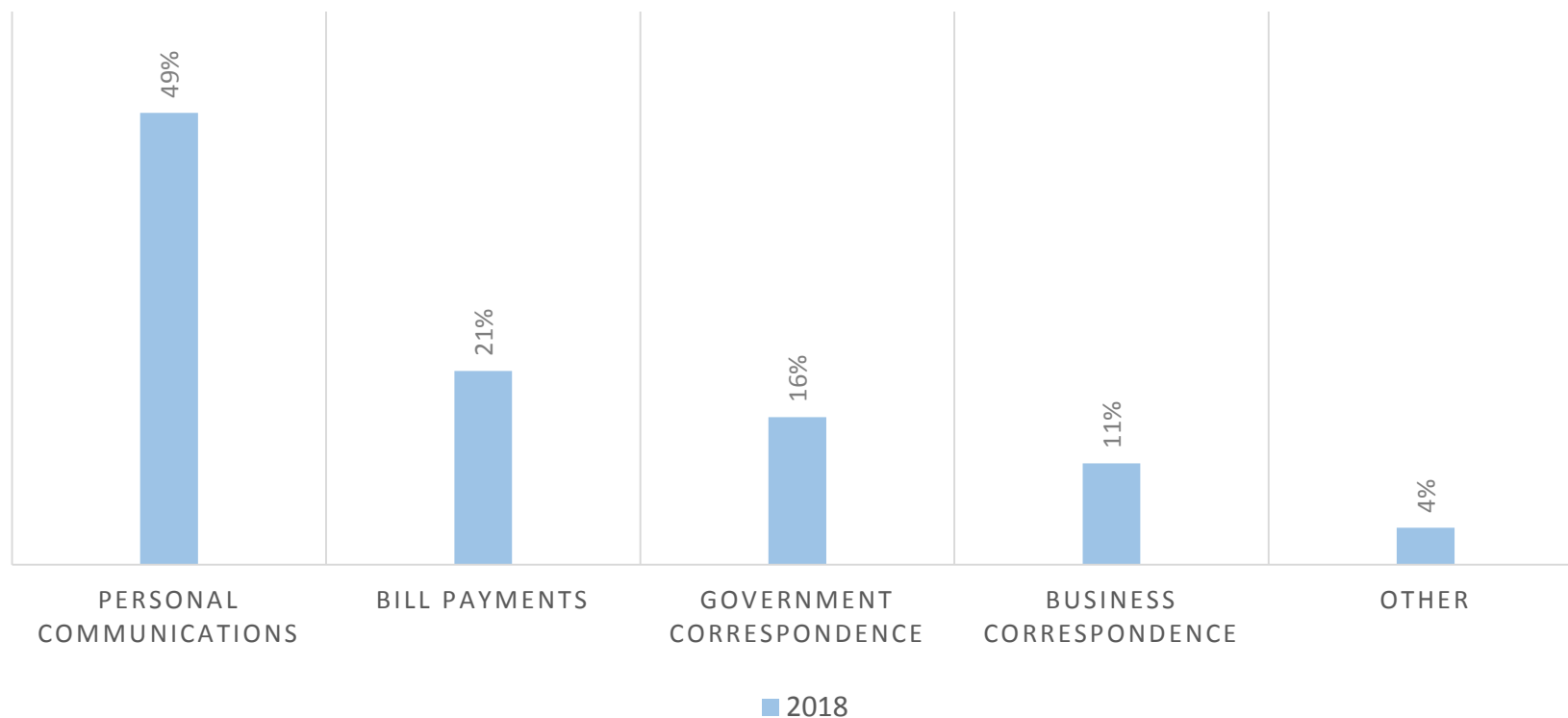


Type of Letter Correspondence Sent

Number of Respondents: 493

(The respondents ranked the type of letter mail sent by most often to least often. These data were then weighted for the analysis.)

Personal communications make up the overwhelming portion of letters sent over the past twelve months.

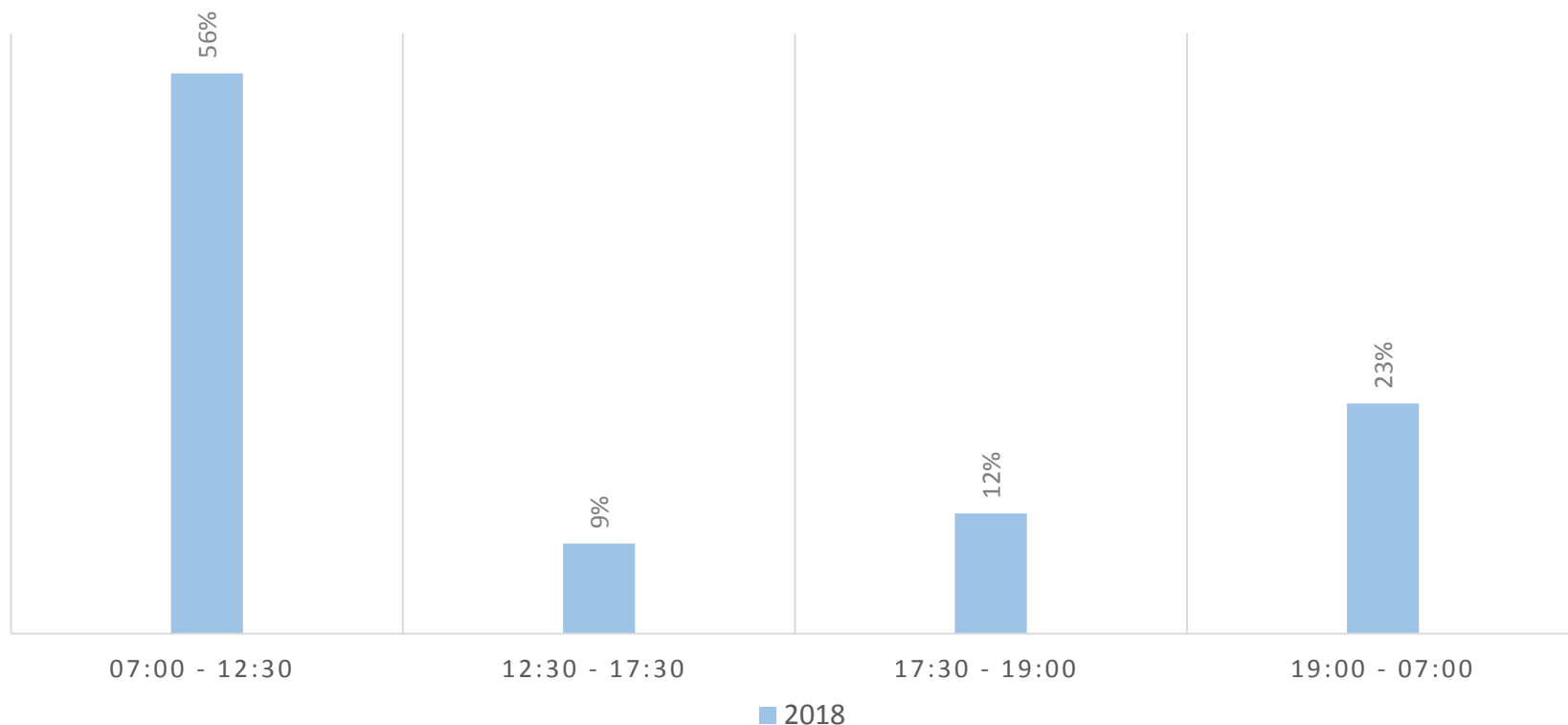


Most Convenient Time of Day (Monday to Saturday) to Post a Letter

Number of Respondents: 267

(Question was answered by those who previously indicated that they had sent a letter)

56% of respondents say that the morning hours (between 7:30 am and 12:30 pm) are the most convenient for respondents who wish to post a letter.

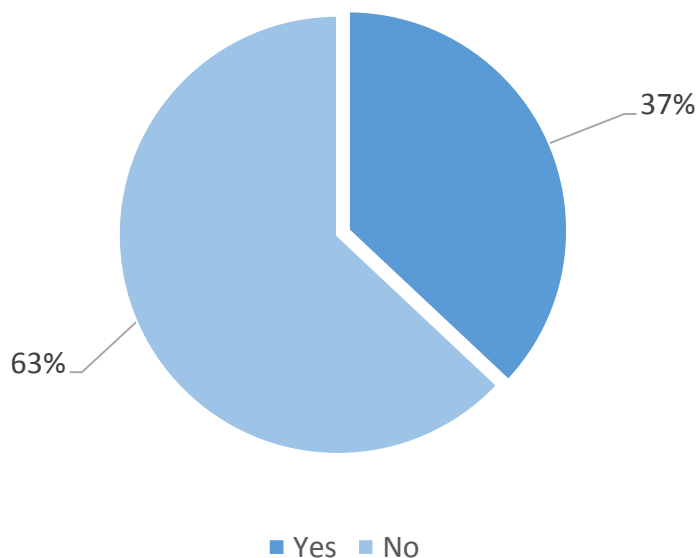


Postcode Usage and Awareness

Awareness of MaltaPost's Post-Code Finder

Number of Respondents: 267 (2018),
(Question was answered by those who previously indicated that they had sent a letter)

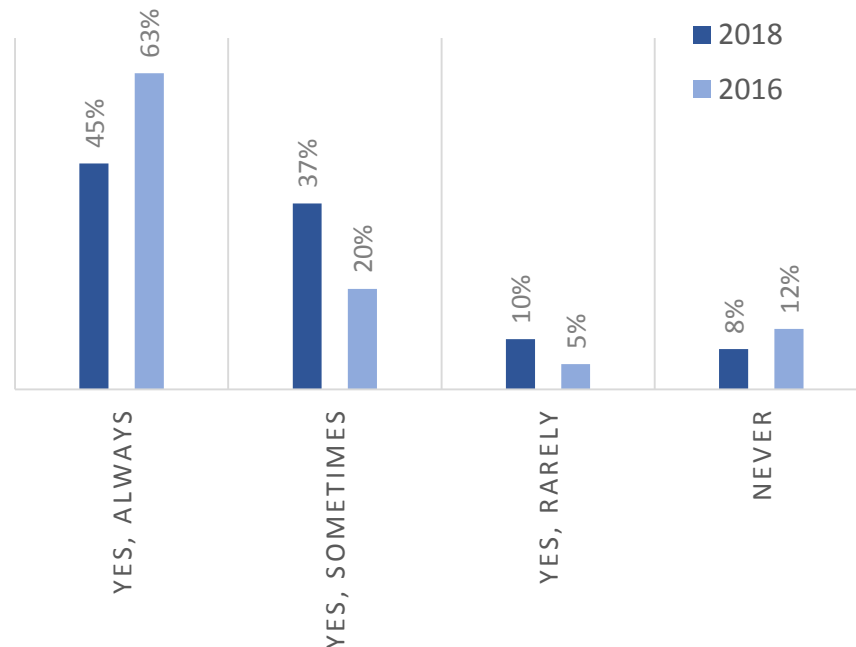
63% of people are unaware that they can search for postcodes online via MaltaPost's website.



Letters Sent with Postcode Written

Number of Respondents: 267 (2018), 500 (2016)
(Question was answered by those who previously indicated that they had sent a letter)

There was a decrease in the number of respondents who always write the post-code, from 63% in the year 2016 to 45%. The number of individuals that never write the post code also decreased, from 12% in 2016 to 8% in 2018.



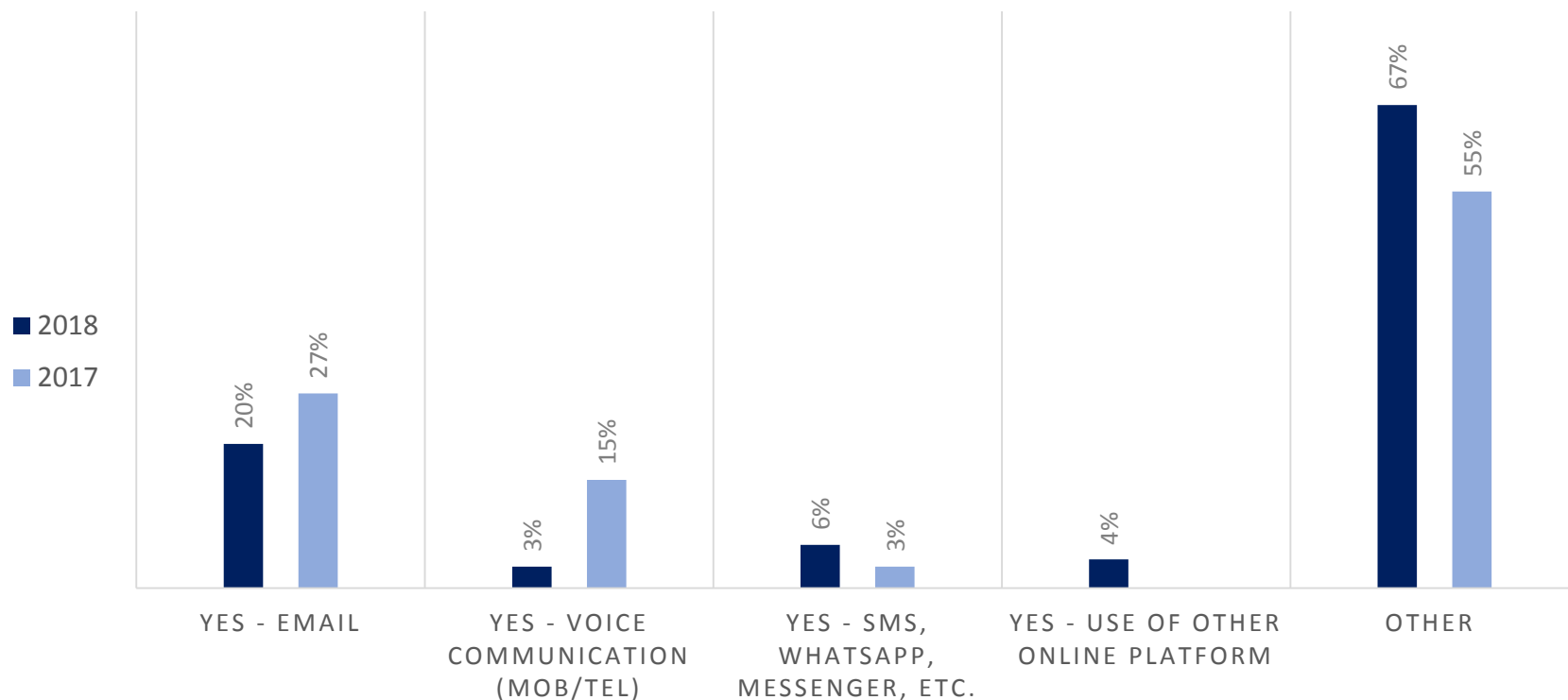
Substitution to non-postal alternatives

Likely to use to alternative service in the case of price increases

Number of Respondents: 266 (2018), 500 (2016)

(Question was answered by those who previously indicated that they had sent a letter)

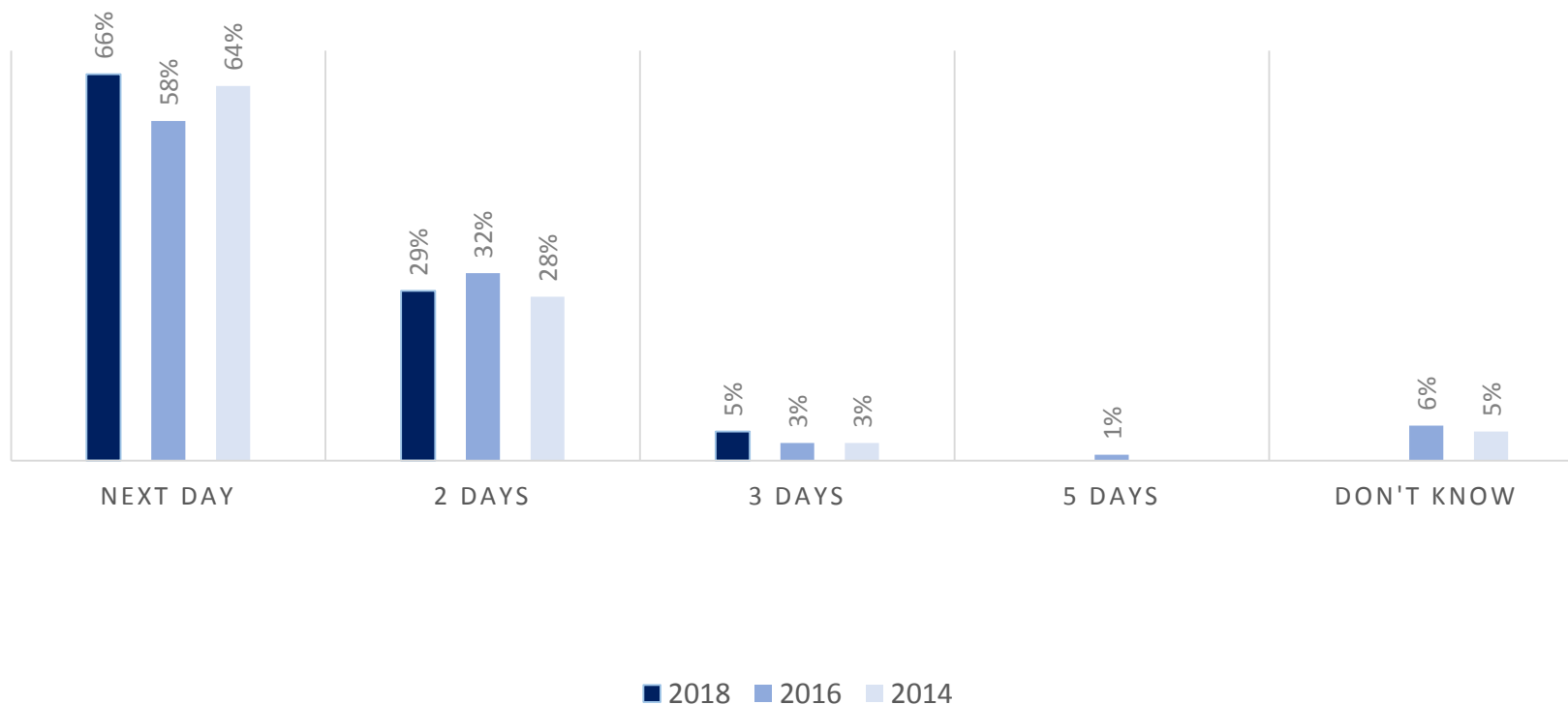
67% of respondents indicated that they would not switch to non-postal alternative if the price of a 50g letter had to rise from 26c to 29c.



Acceptable Lead Time from Posting to Delivery

Number of Respondents: 482 (2018), 500 (2016), 500 (2014)

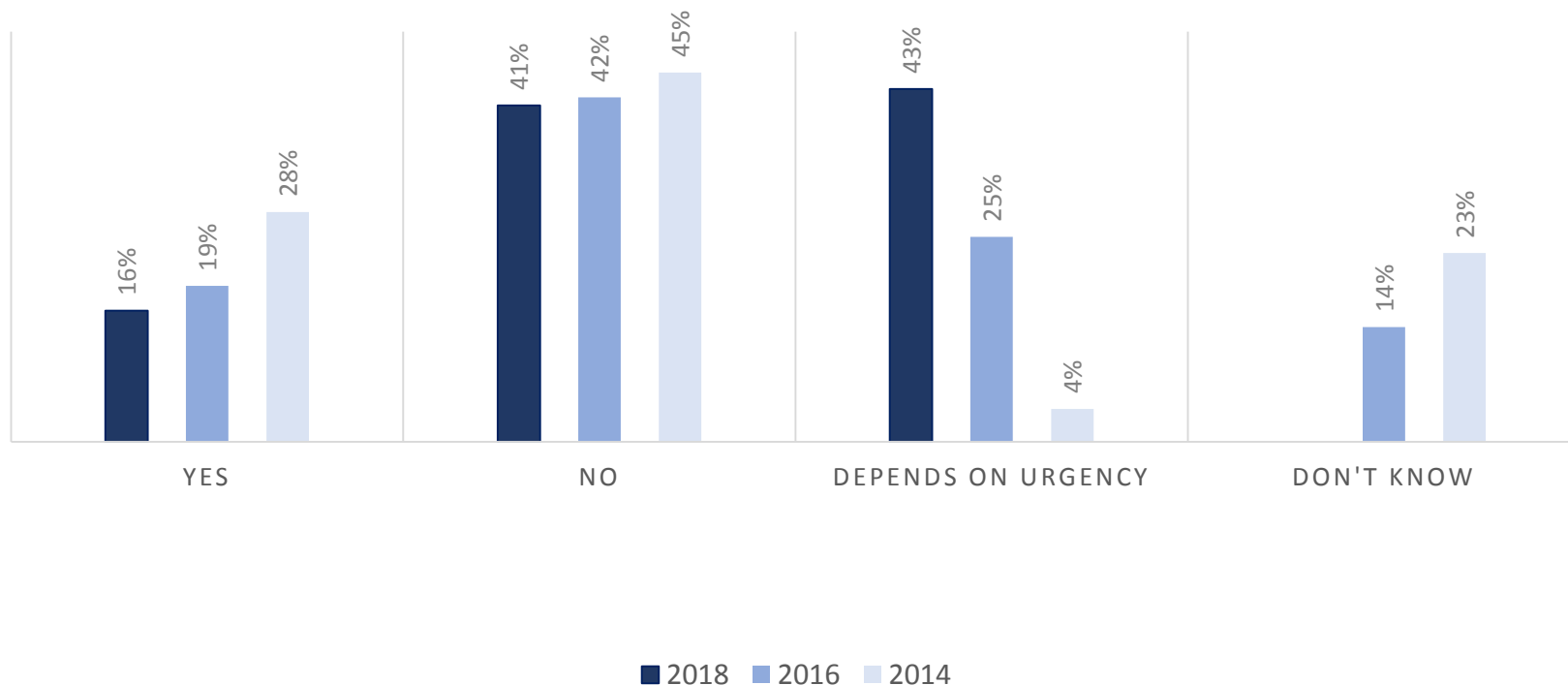
In line with the 2016 survey, most people (66%) prefer next day delivery.



Deferred delivery (3 days instead of next day) at a discounted tariff rate

Number of Respondents: 500

Respondents were asked if they would opt into a service that delivered within 3 days at a cheaper cost as opposed to next day delivery. 41% answered that they would not, in line with 2016 results. 43% would opt for deferred delivery depending on the urgency of the postal item.

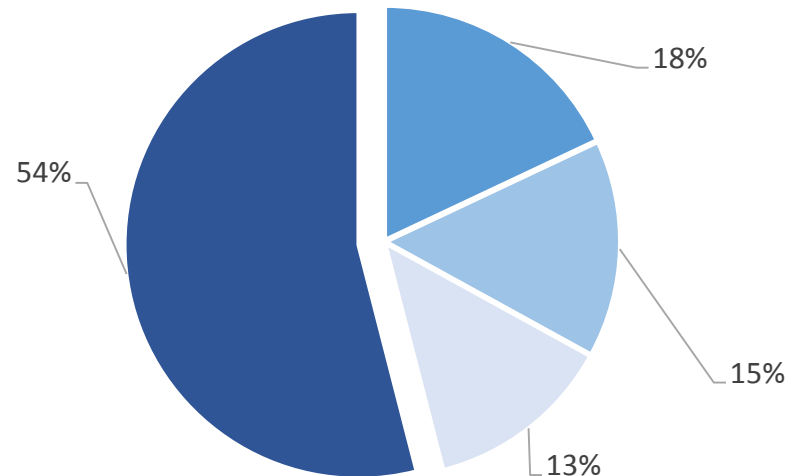


Acceptability of a 5-day Week

A 5 day week instead of a 6 day week would be...

Number of Respondents: 500

Acceptable to 54% of respondents, and only a major inconvenience for 13% of respondents.

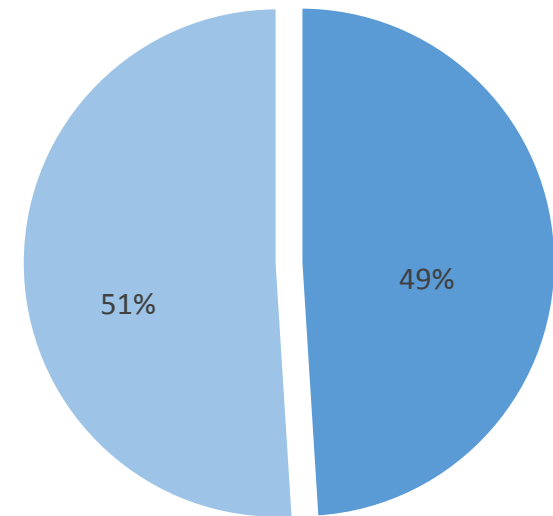


■ Inconvenient but workable
 ■ A minor inconvenience
■ A major inconvenience
 ■ Acceptable

Should prices increase to maintain a 6-day service?

Number of Respondents: 500

Respondents are divided on whether or not a 6-day service should be sustained by higher prices.



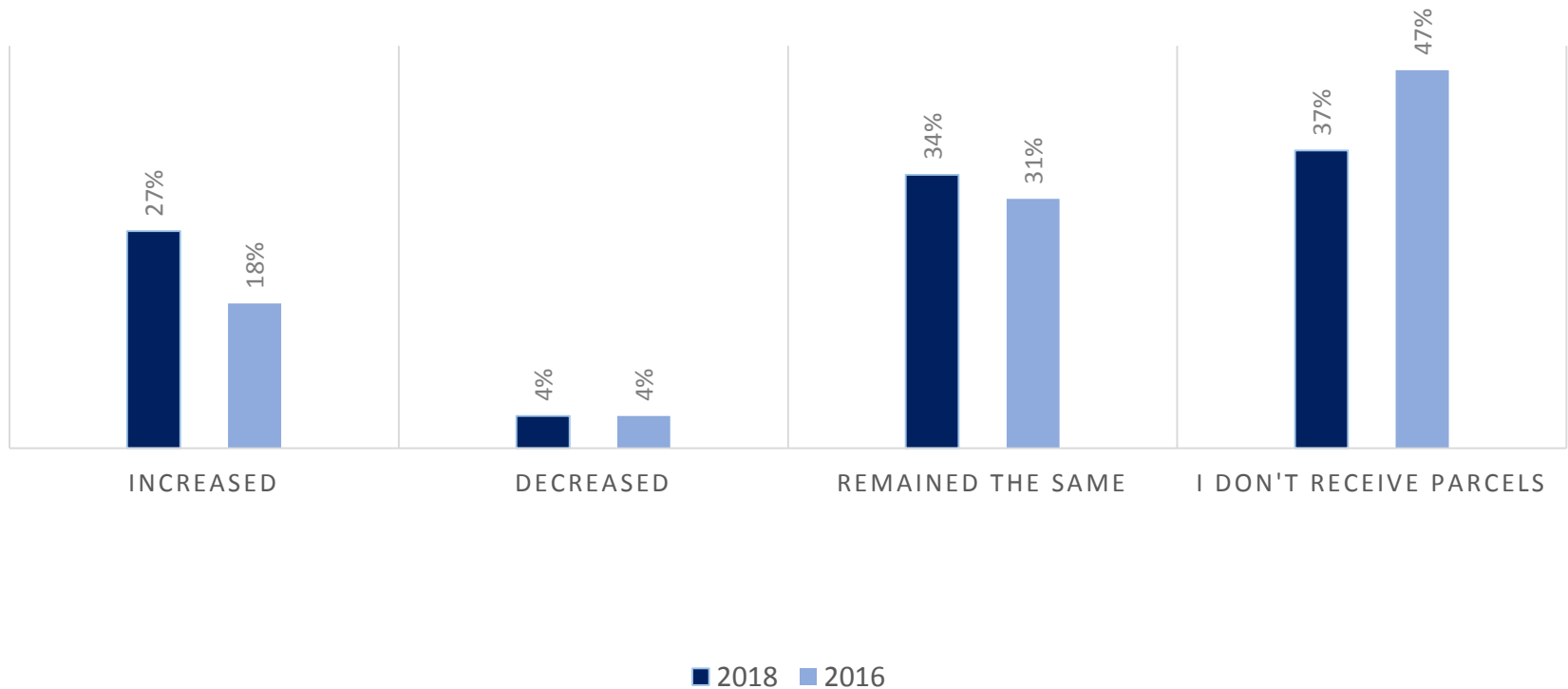
■ Yes
 ■ No

Parcel Mail

Number of Parcels Received in the Past Twelve Months

Number of Respondents: 500

27% of respondents indicated an increase in the number of parcels received. As a result, the number of people who did not receive parcels dropped by 10 percentage points.

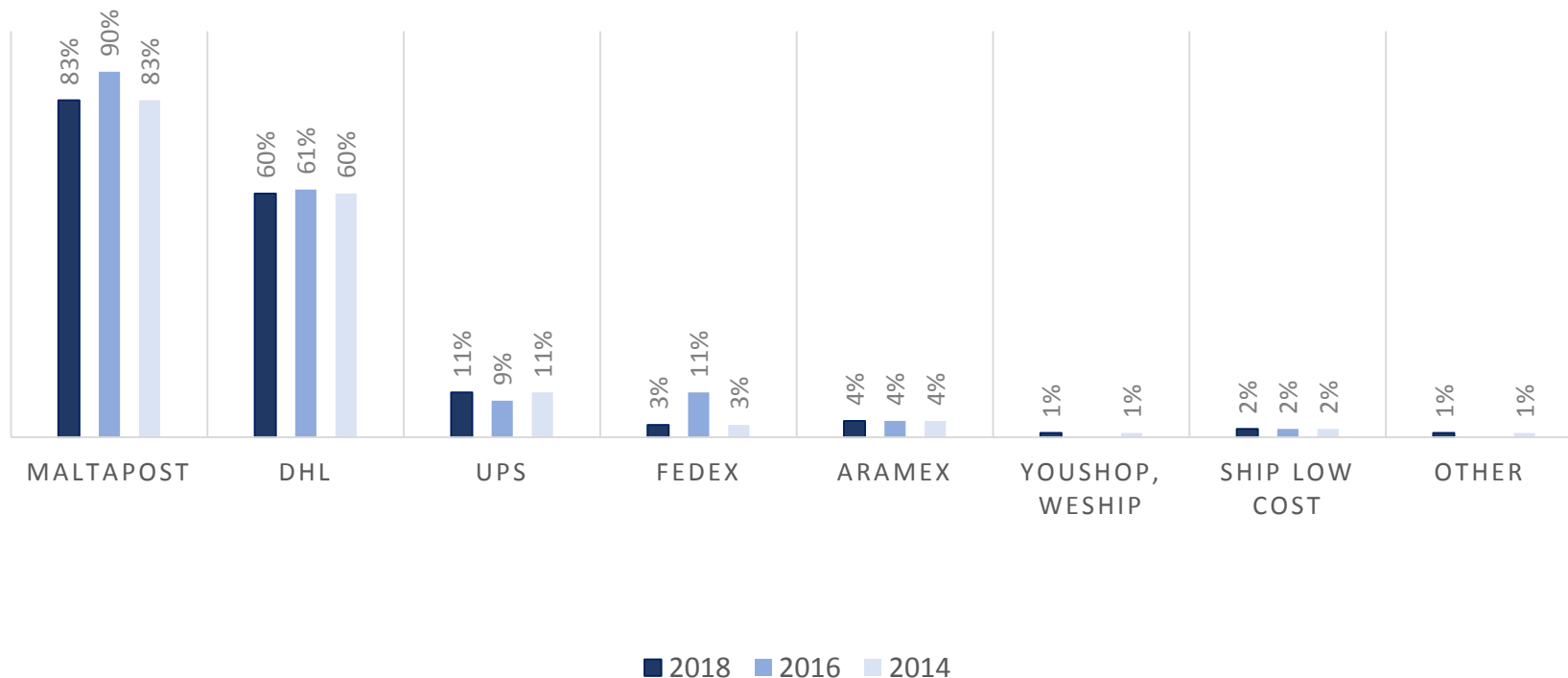


Parcel Delivery by Operator

Number of Respondents: 317 (2018), 266 (2016)

(Question was answered by those who previously indicated that they had received a parcel. Respondents were allowed multiple answers.)

Respondents were asked which operators delivered the most parcels to their home. MaltaPost and DHL remain the most popular choices for receiving parcel mail.

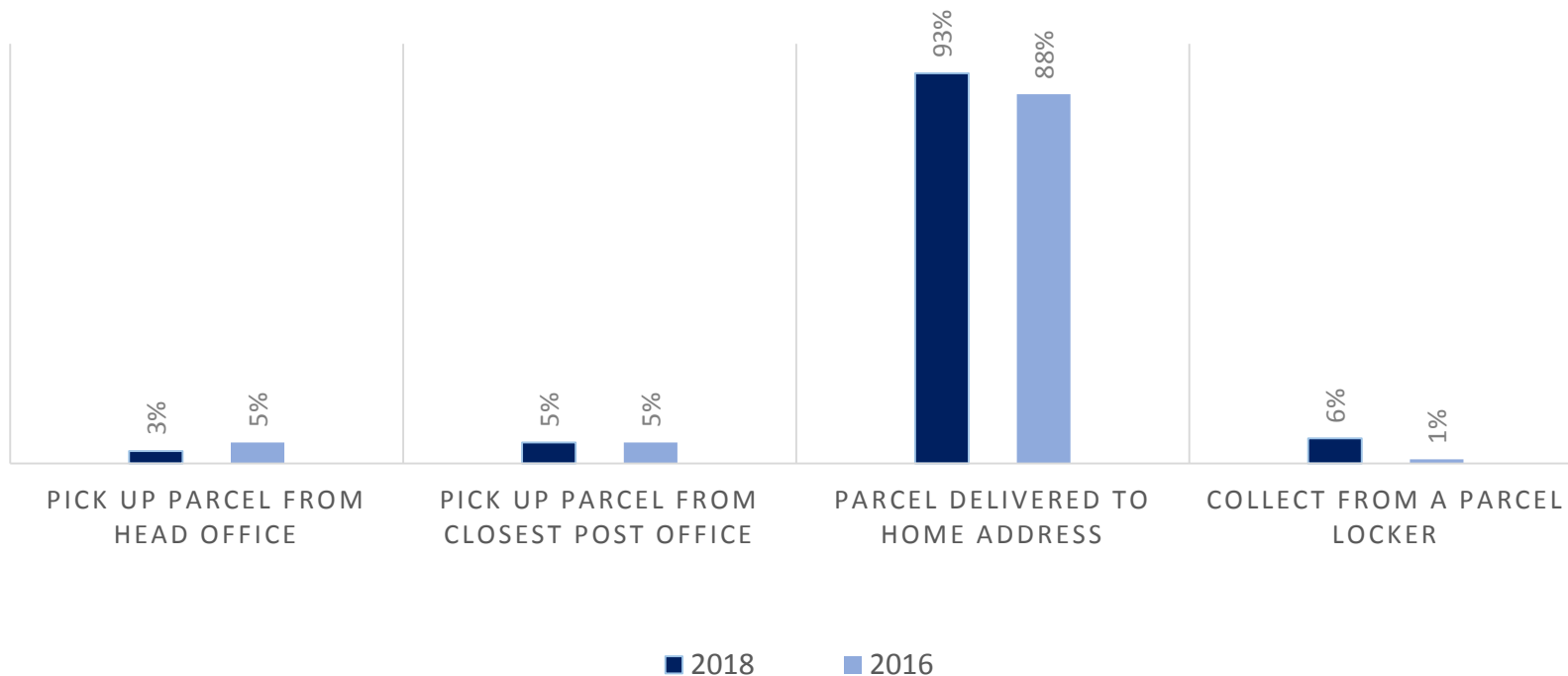


Preferred Way to Receive a Parcel

Number of Respondents: 317 (2018), 260 (2016)

(Question was answered by those who previously indicated that they had received a parcel. Respondents were allowed multiple answers.)

93% of respondents prefer receiving their parcel at the indicated address. 6% prefer to collect it from a parcel locker (1% in 2016).

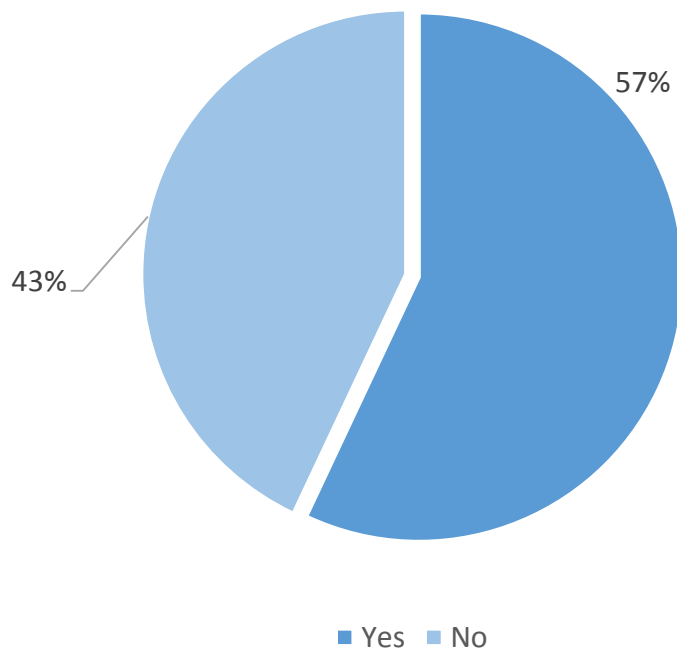


Awareness of Parcel Lockers

Number of Respondents: 317

(Question was answered by those who previously indicated that they had received a parcel)

57% of respondents were aware of the availability parcel lockers.



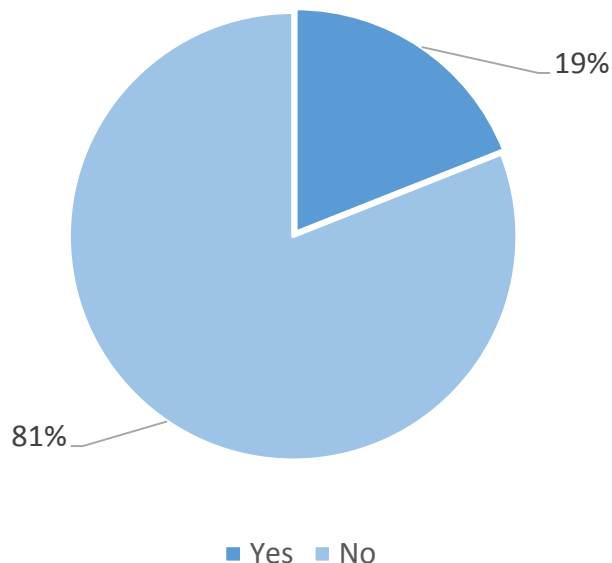
Awareness and Use of Lockers

Parcel Locker Use

Number of Respondents: 181

(Question was answered by those who previously indicated that they were aware of parcel lockers)

19% of people aware of the availability parcel lockers have used one in the last 12 months.

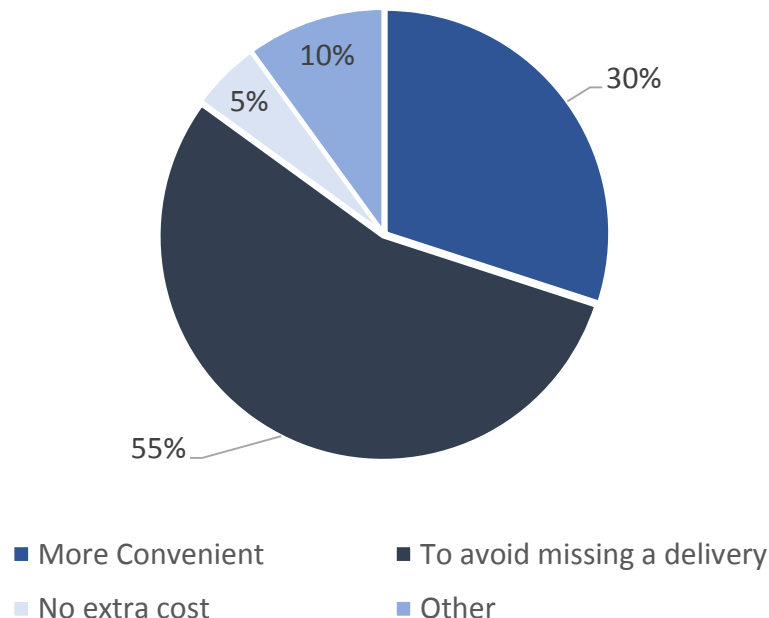


Reasons for Parcel Locker Use

Number of Respondents: 34

(Question was answered by those who previously indicated that they had used a parcel locker)

Parcel lockers are most commonly used to avoid missing a delivery.

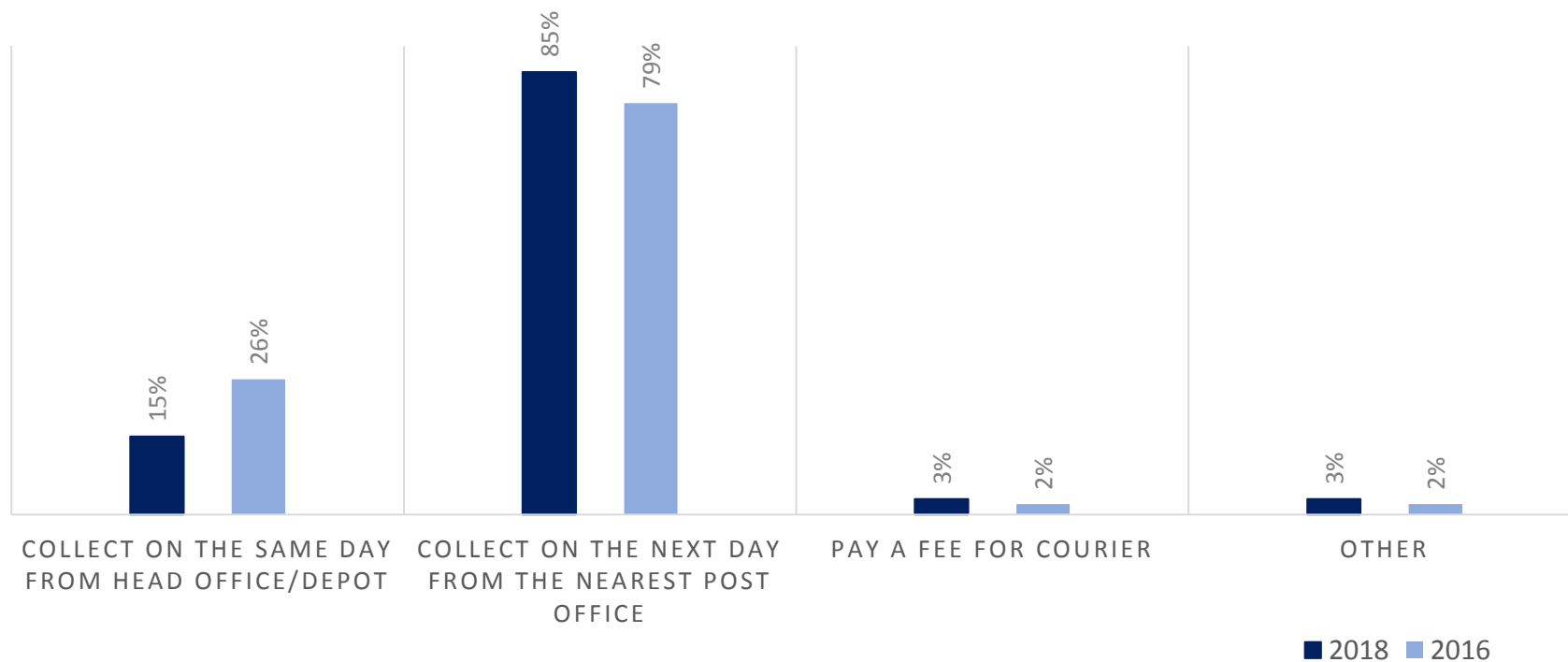


Preferred Way to Collect a Parcel if a Delivery is Missed

Number of Respondents: 317 (2018), 260 (2016).

(Question was answered by those who previously indicated that they had received a parcel. Respondents were allowed multiple answers.)

When missing a delivery, 85% of respondents indicated to prefer to collect the parcel the next day from the nearest post office (79% in 2016).



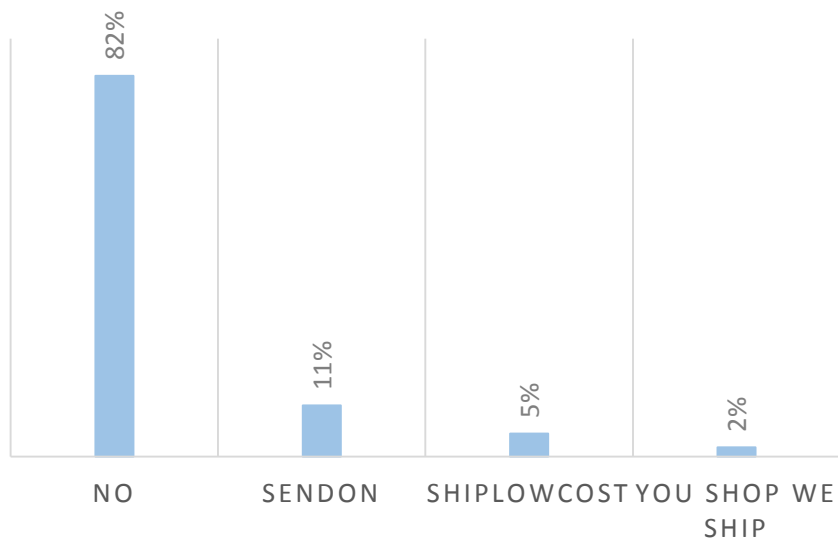
Postal Article Forwarding Services

Use of Packet/Parcel Forwarding Services

Number of Respondents: 317

(Question was answered by those who previously indicated that they had received a parcel)

18% of respondents have used forwarding services, mainly SendOn, indicated by 11% of respondents.

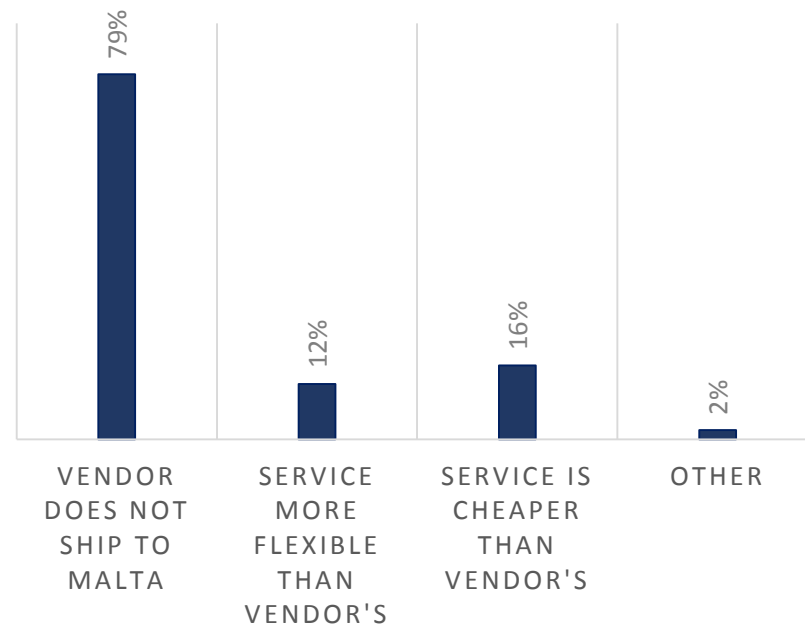


Reasons for Using a Forwarding Service

Number of Respondents: 58

(Question was answered by those who previously indicated that they had used a forwarding service)

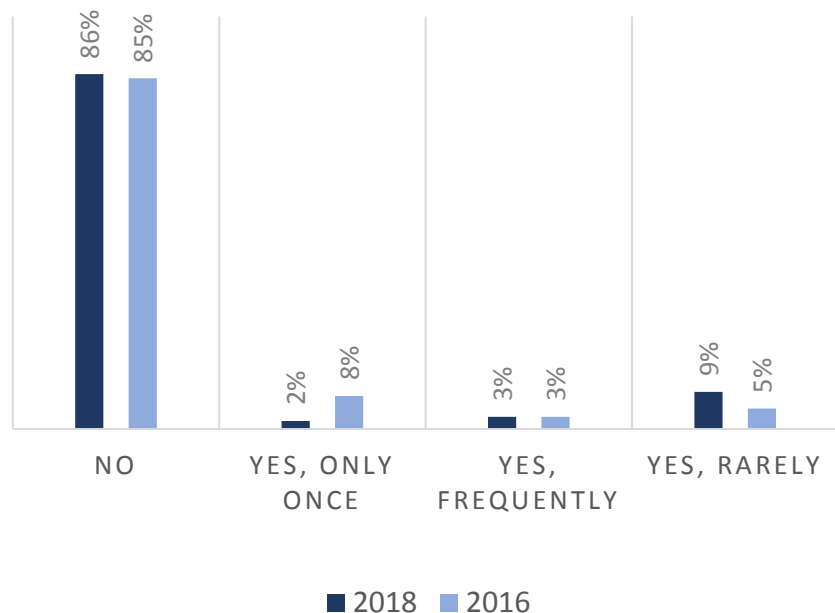
79% used forwarding services because the vendor did not deliver goods to Malta



Parcels sent using MaltaPost

Number of Respondents: 500

14% of respondents have sent a parcel using MaltaPost in the last 12 months.

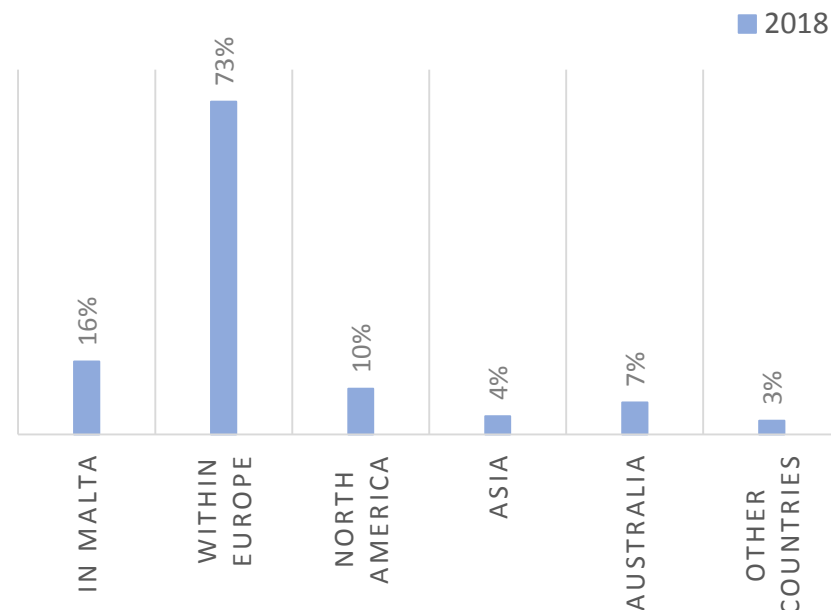


Destination of Parcels sent using MaltaPost

Number of Respondents: 70

(Question was answered by those who previously indicated that they had sent a parcel using MaltaPost. Respondents were allowed multiple answers.)

Europe is the most common destination for sending foreign parcels (73%).

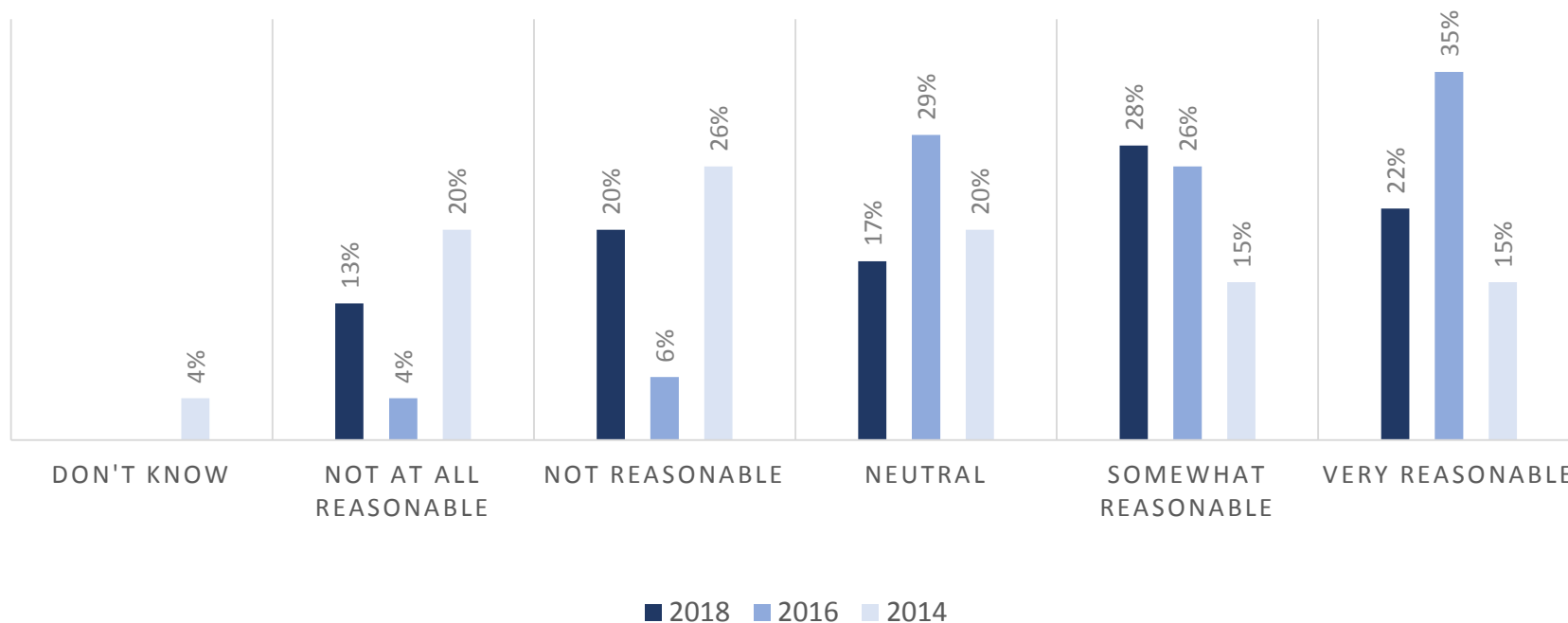


Are MaltaPost's Prices Reasonable for Parcels sent Overseas?

Number of Respondents: 64 (2018), 77(2016), 46 (2014)

(Question was answered by those who previously indicated that they had sent a parcel using MaltaPost to a foreign location)

Respondents are likelier to report finding MaltaPost's foreign parcel pricing less reasonable than in previous years.

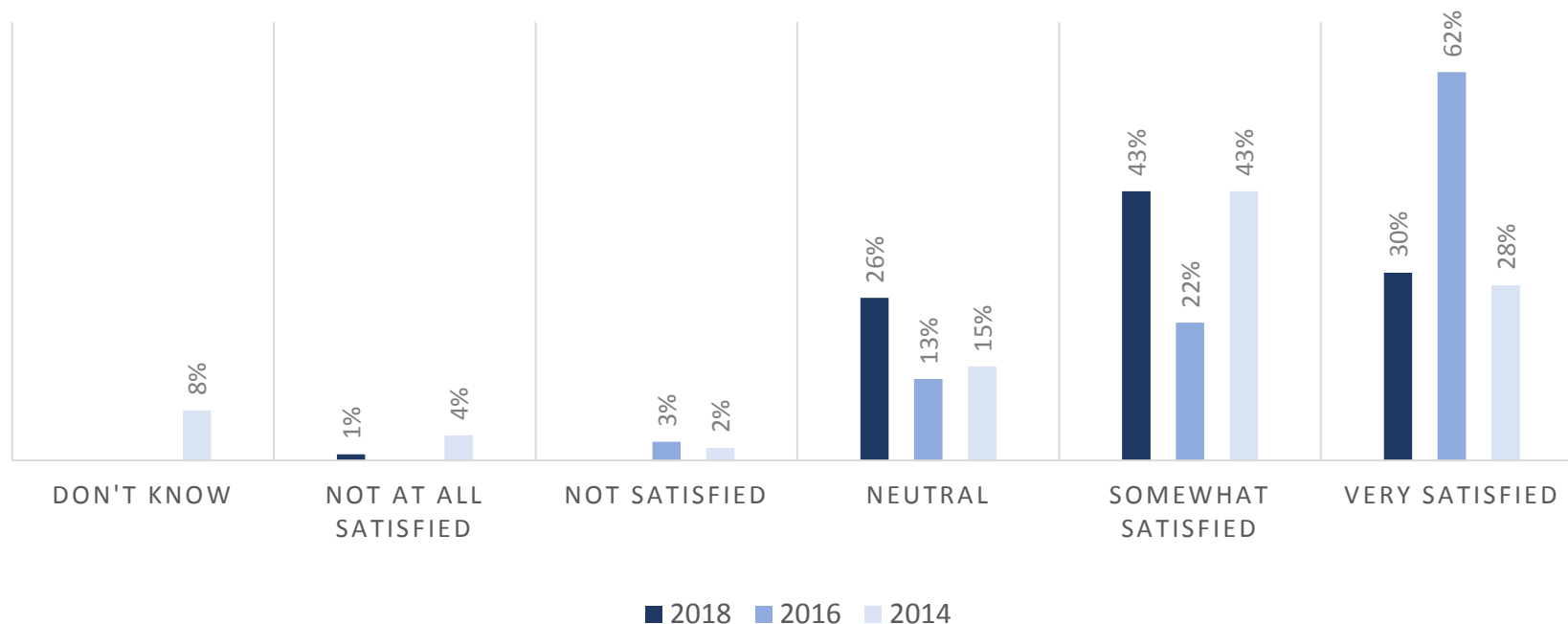


Satisfaction with Sending a Parcel Overseas Using MaltaPost's Service

Number of Respondents: 70 (2018), 77 (2016), 46 (2014)

(Question was answered by those who previously indicated that they had sent a parcel using MaltaPost)

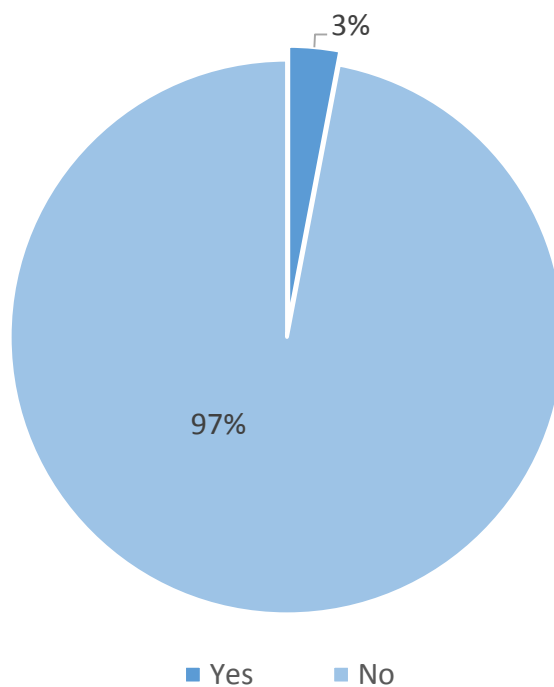
Respondents are less likely to report being very satisfied with MaltaPost's foreign parcel service in 2018 than in 2016.



Other Operators (excluding MaltaPost) Used to Send a Parcel within the Past Twelve Months

Number of Respondents: 500

3% of respondents used operators others than MaltaPost to send parcels, down from 12% in 2016.

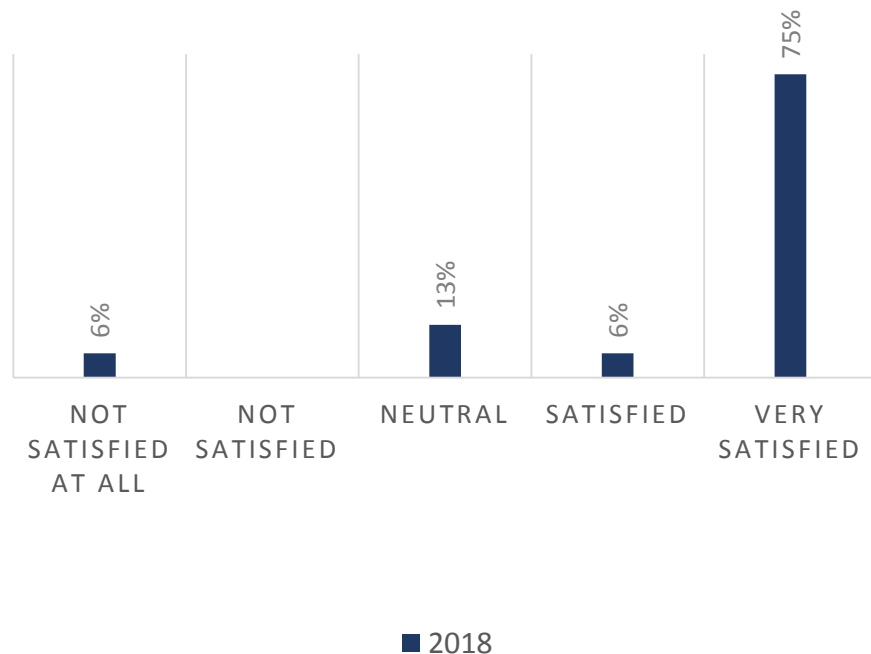


Satisfaction with Parcels Sent Using Other Operators

Number of Respondents: 16

(Question was answered by those who previously indicated that they had used alternate operators)

81% of respondents are satisfied with the service offered by other operators when sending a parcel.

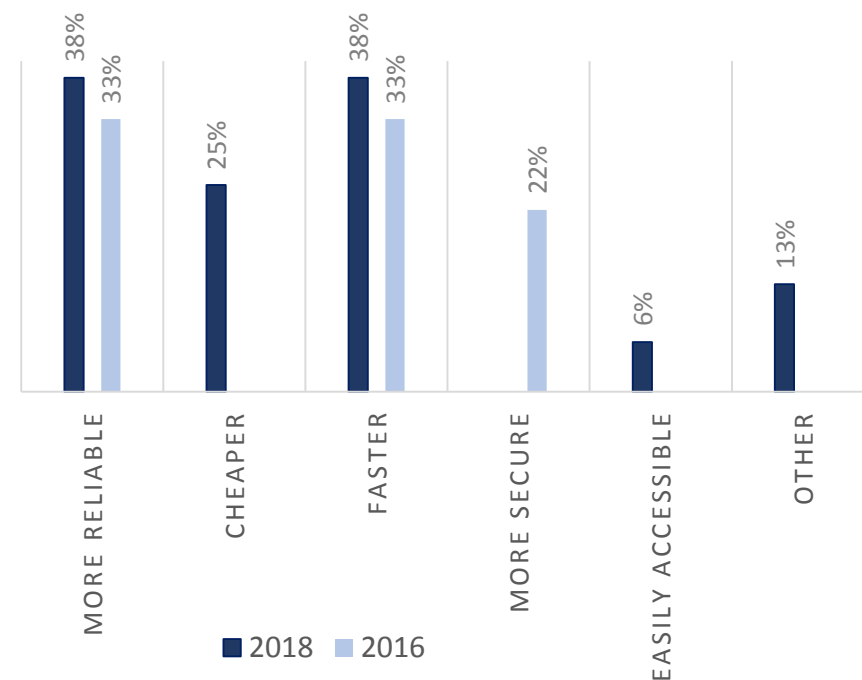


Reasons for Using Other Operators

Number of Respondents: 16 (2018), 9 (2017)

(Question was answered by those who previously indicated that they had sent a parcel using MaltaPost. Respondents were allowed multiple responses.)

38% of respondents used other operators because they are more reliable and faster than MaltaPost.

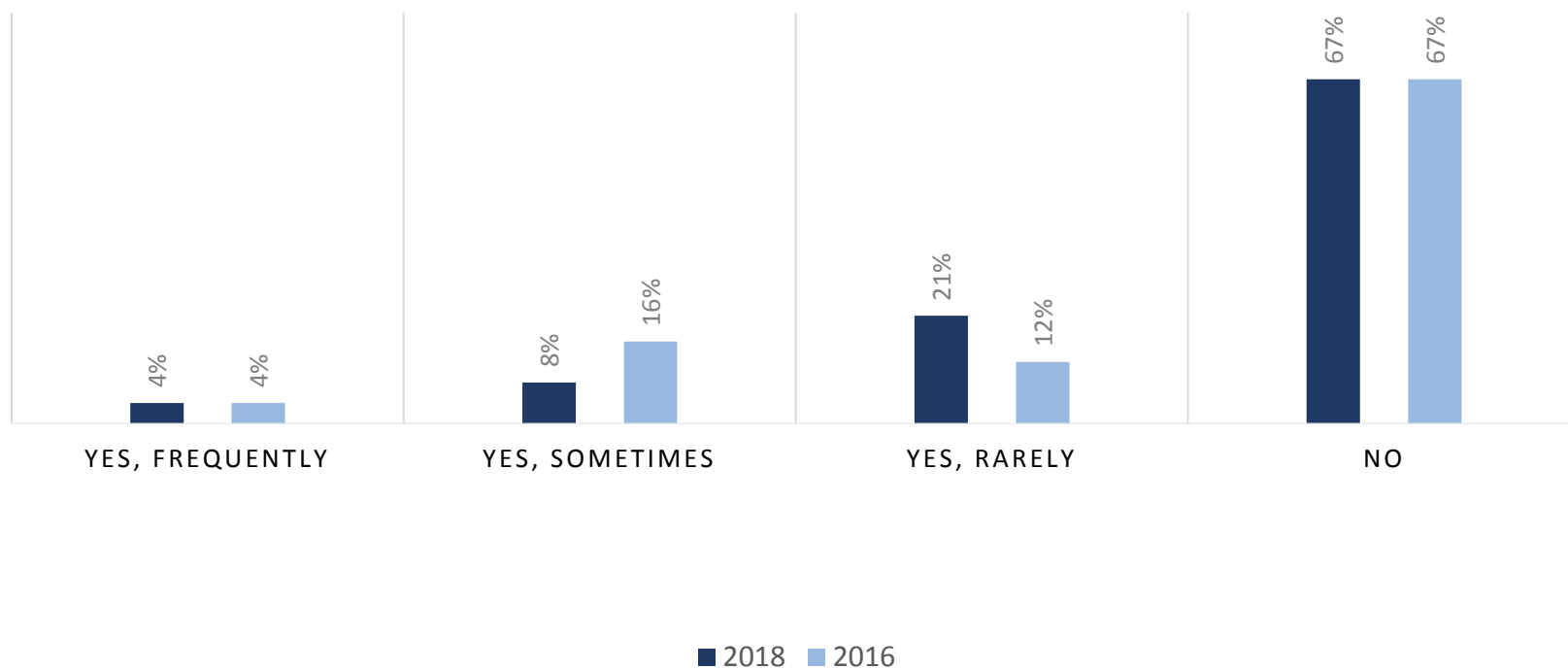


Registered Mail

Registered Mail Sent

Number of Respondents: 500

33% of respondents have sent registered mail in the last 12 months in line with 2016 results.

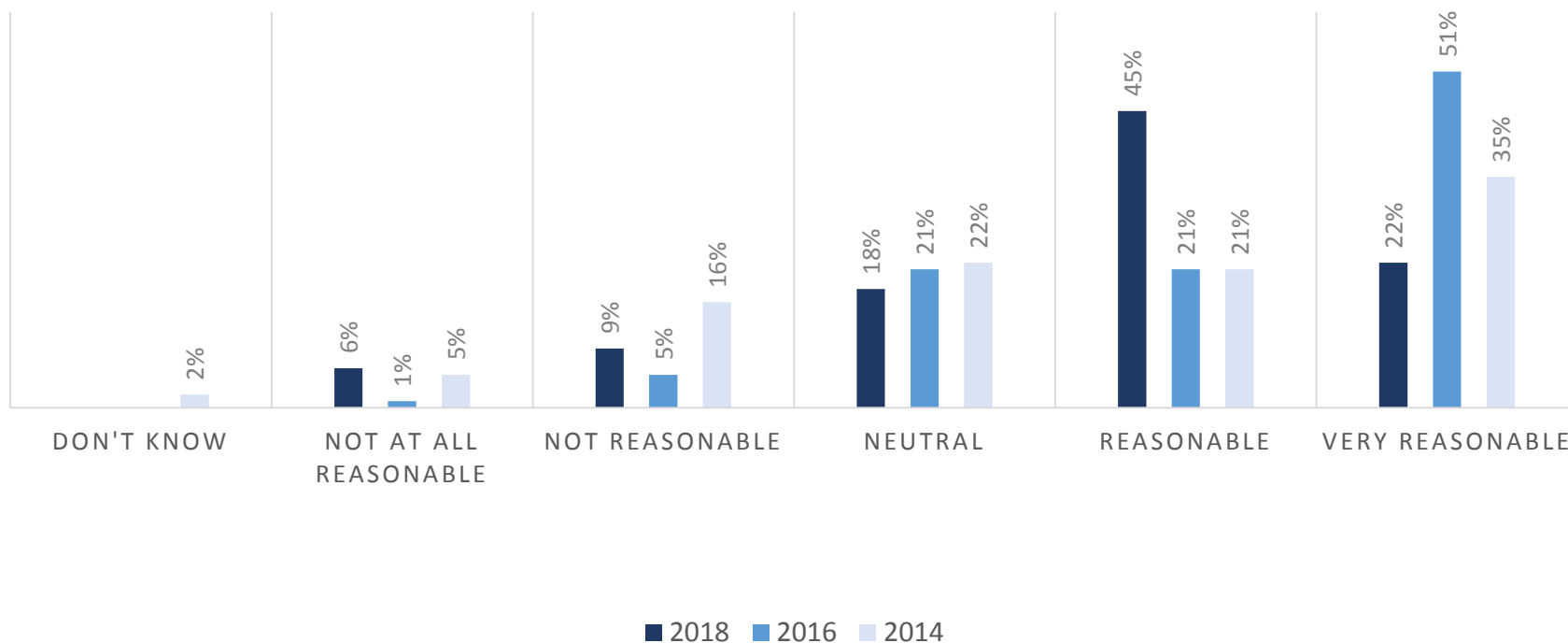


Reasonableness of Registered Mail Prices

Number of Respondents: 165 (2018), 164 (2016),

(Question was answered by those who previously indicated that they had sent registered mail)

67% of respondents find the price of registered mail to be reasonable (72% in 2016).



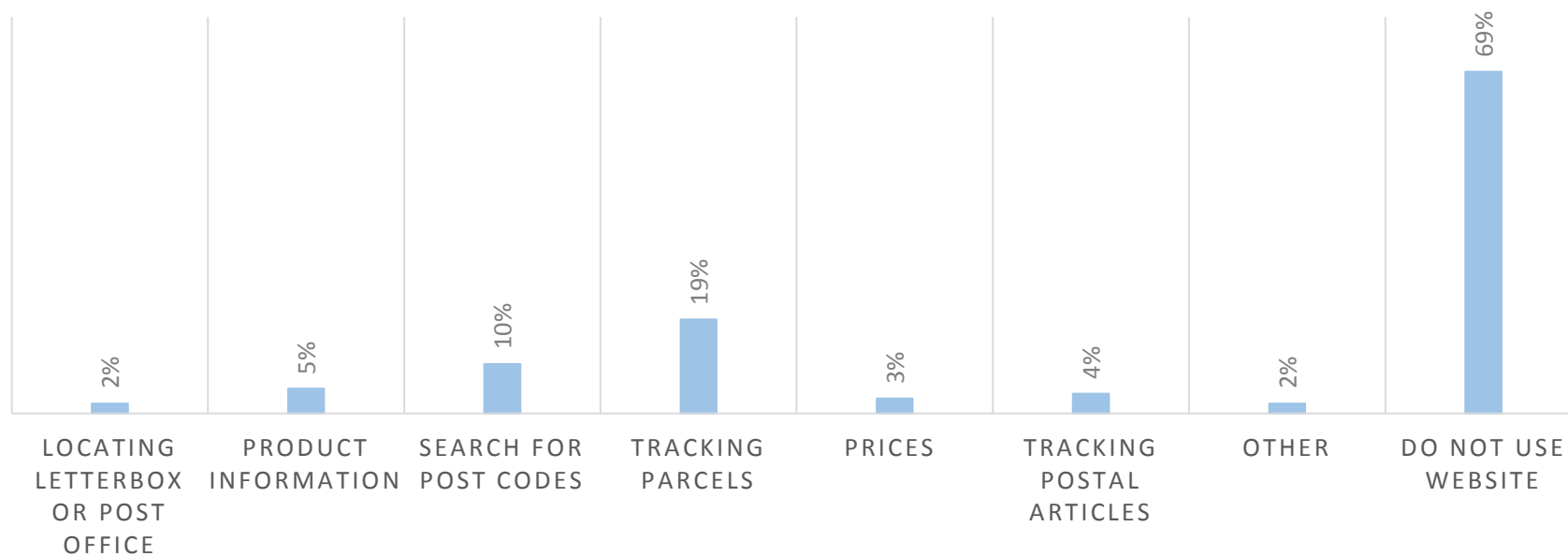
MaltaPost Services

Reasons for Using MaltaPost's Website

Number of Respondents: 500

(Respondents were allowed multiple answers.)

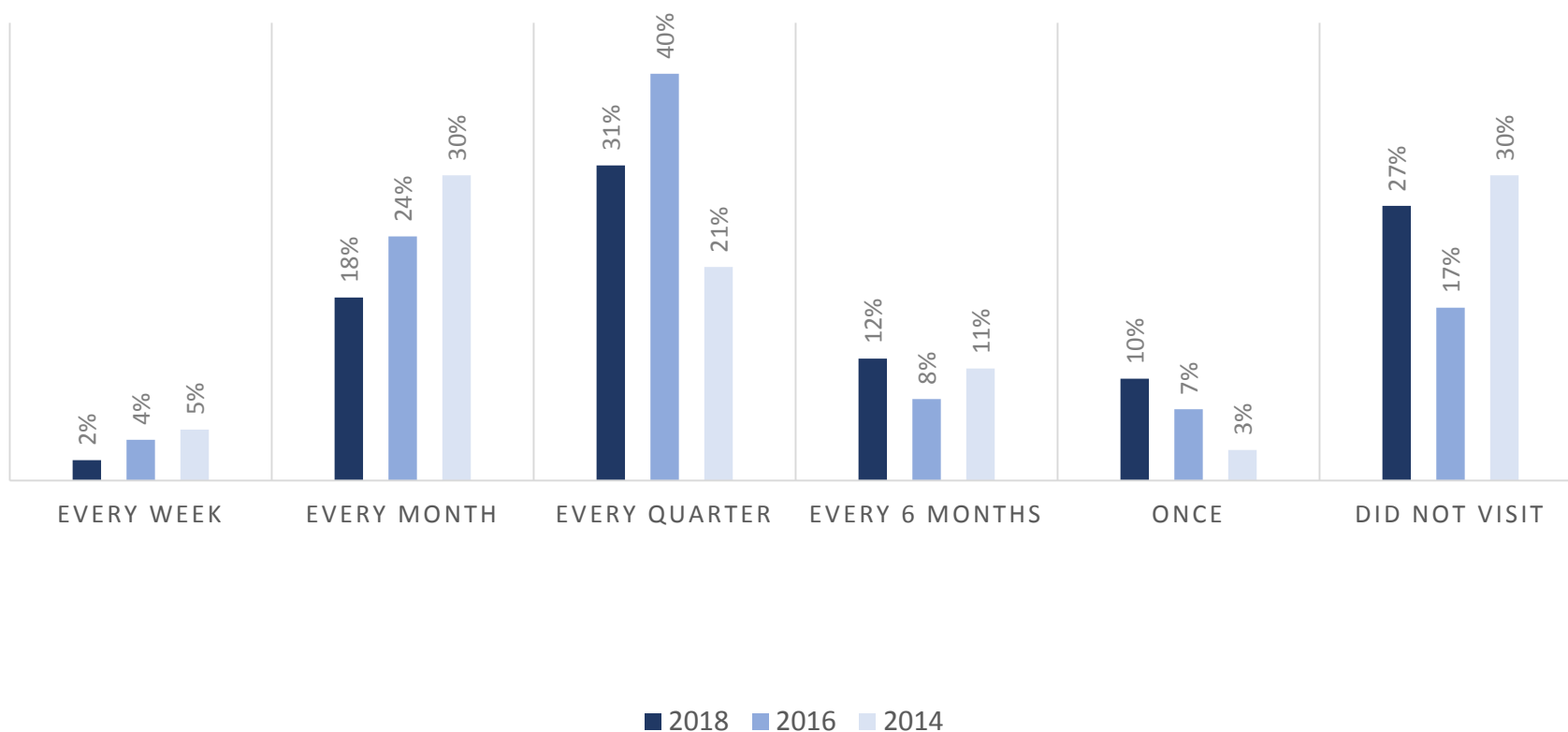
31% of respondents use the MaltaPost website. 19% use it to track parcels.



Visits to the Post Office

Number of Respondents: 500

73% of respondents visited the post office at least once in the last 12 months, down from the 84% in 2016.

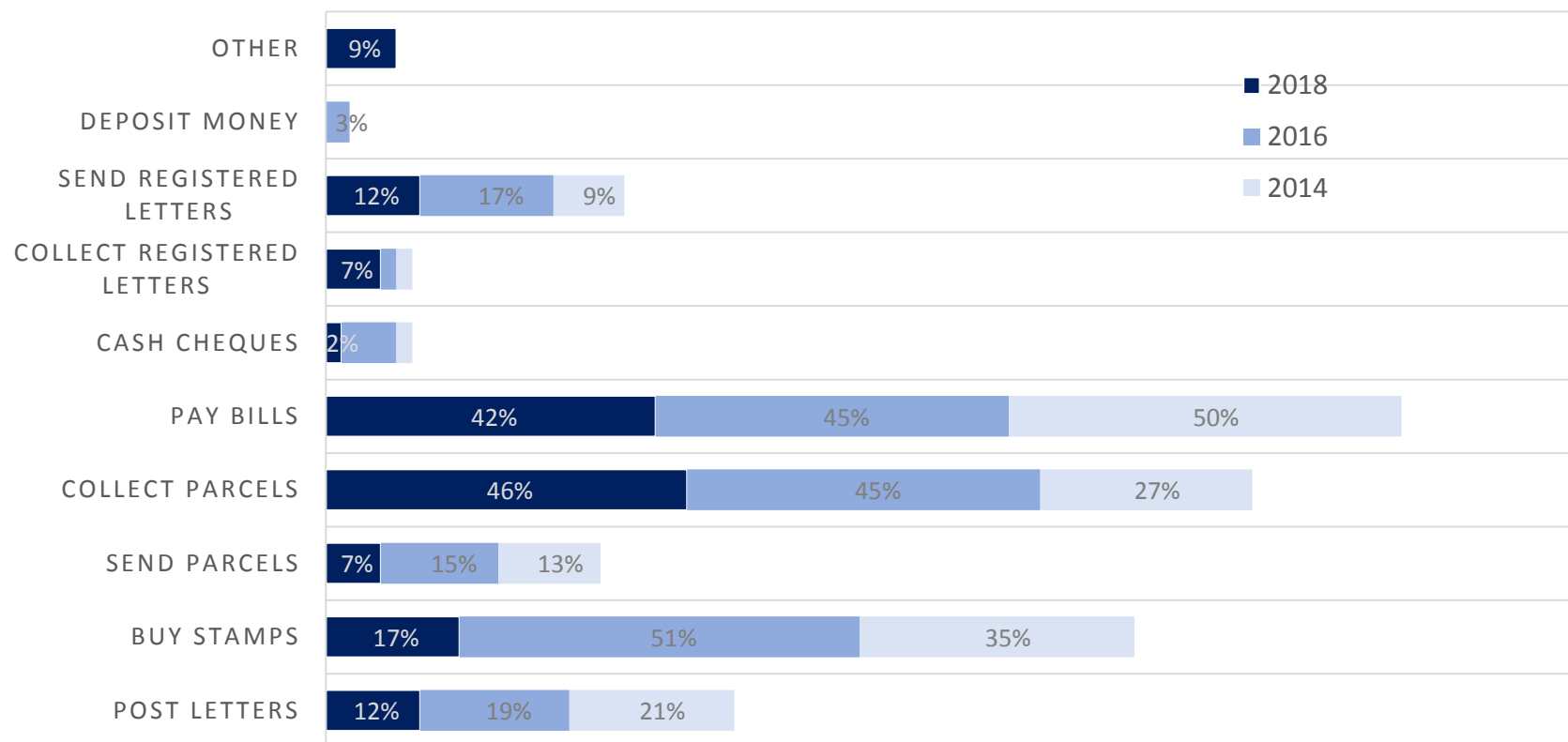


Reasons for Visiting the Post Office

Number of Respondents: 364 (2018), 500 (2016), 349(2017)

(Question was answered by those who previously indicated that they had visited post office. Respondents were allowed multiple answers.)

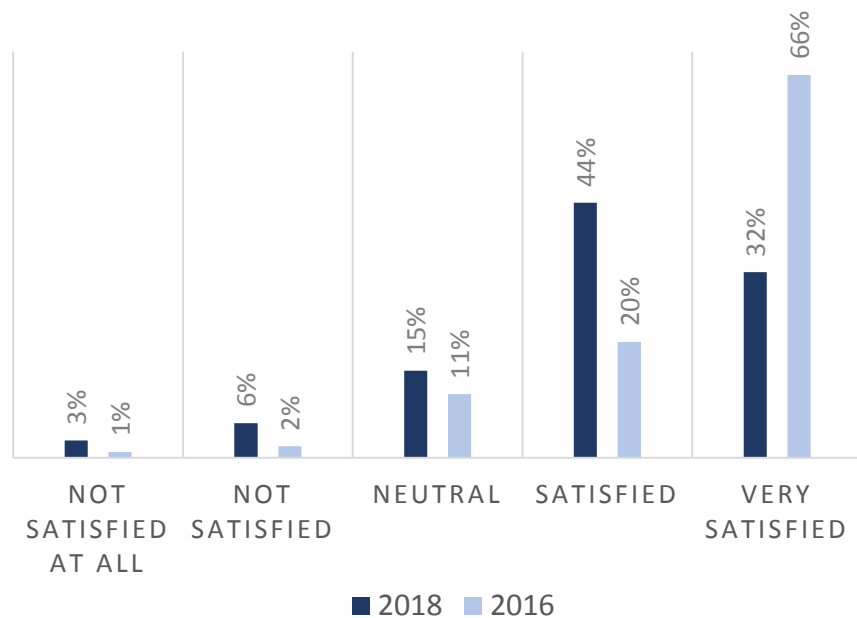
The most common reasons for visiting post offices are parcel collection and to pay bills.



Satisfaction with Postal Office Opening Hours

Number of Respondents: 364 (2018), 418 (2016)
(Question was answered by those who previously indicated that they had visited post office)

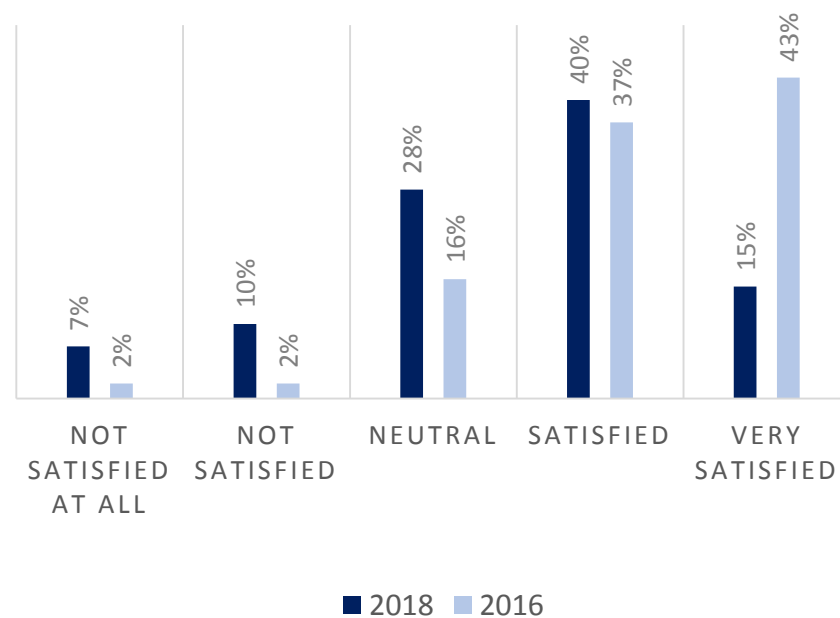
76% of respondents are satisfied with the Postal Office's Opening Hours (86% in 2016)



Reasonableness of Waiting Times at Post Office

Number of Respondents: 364 (2018), 418 (2016)
(Question was answered by those who previously indicated that they had visited post office)

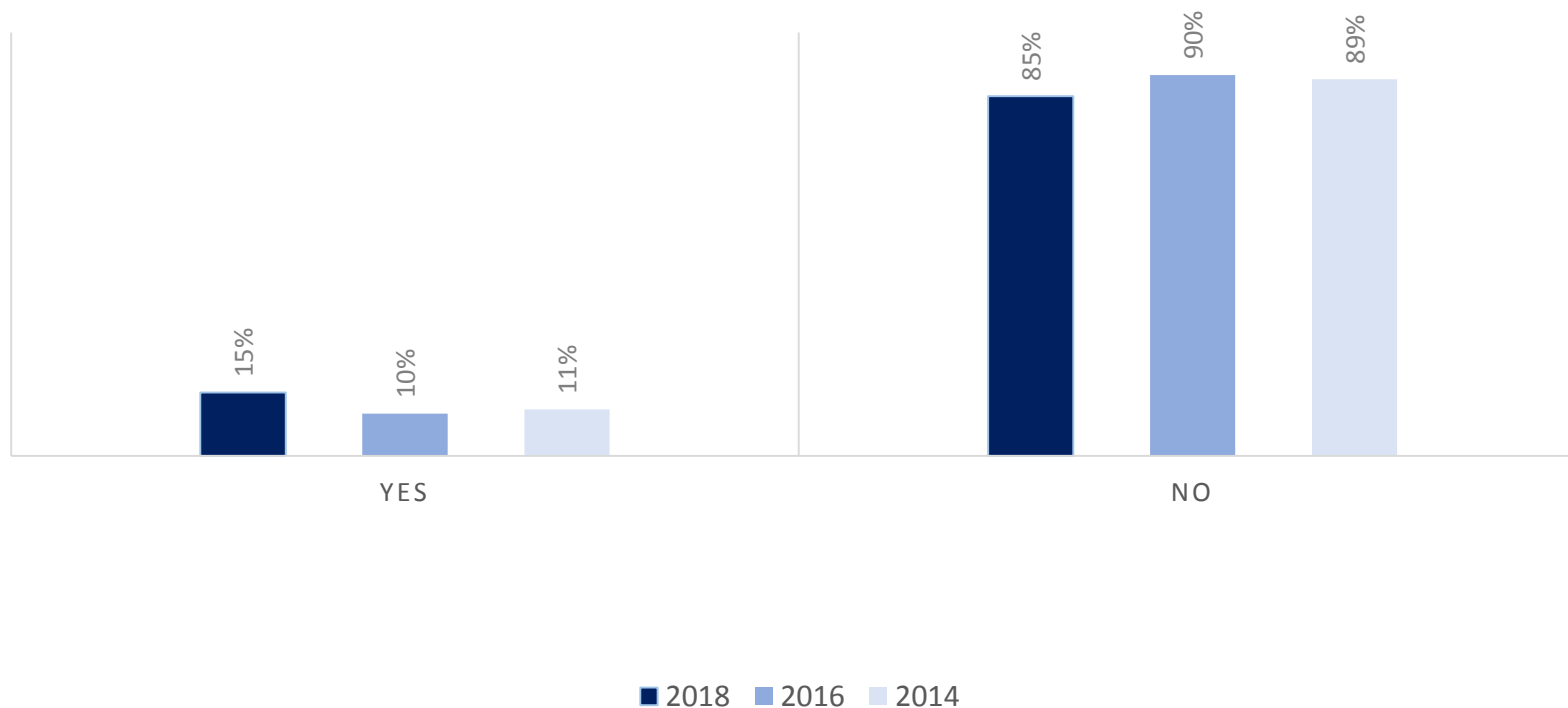
Only 55% of respondents reported satisfaction with waiting times at Post Offices, down from 80% in 2016.



Have you contacted MaltaPost in the last year?

Number of Respondents: 500

85% of respondents have not contacted MaltaPost in the last 12 months.

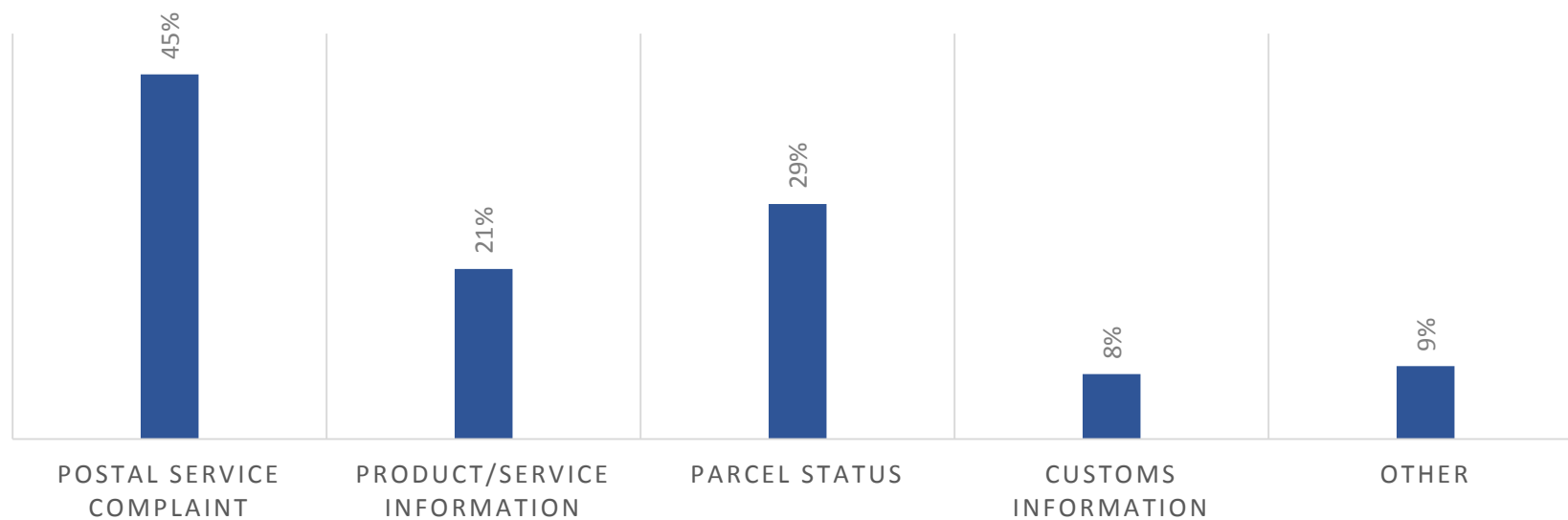


Reasons for Contacting MaltaPost

Number of Respondents: 77

(Question was answered by those who previously indicated that they had contacted MaltaPost)

45% of respondents contacted MaltaPost to make a complaint.



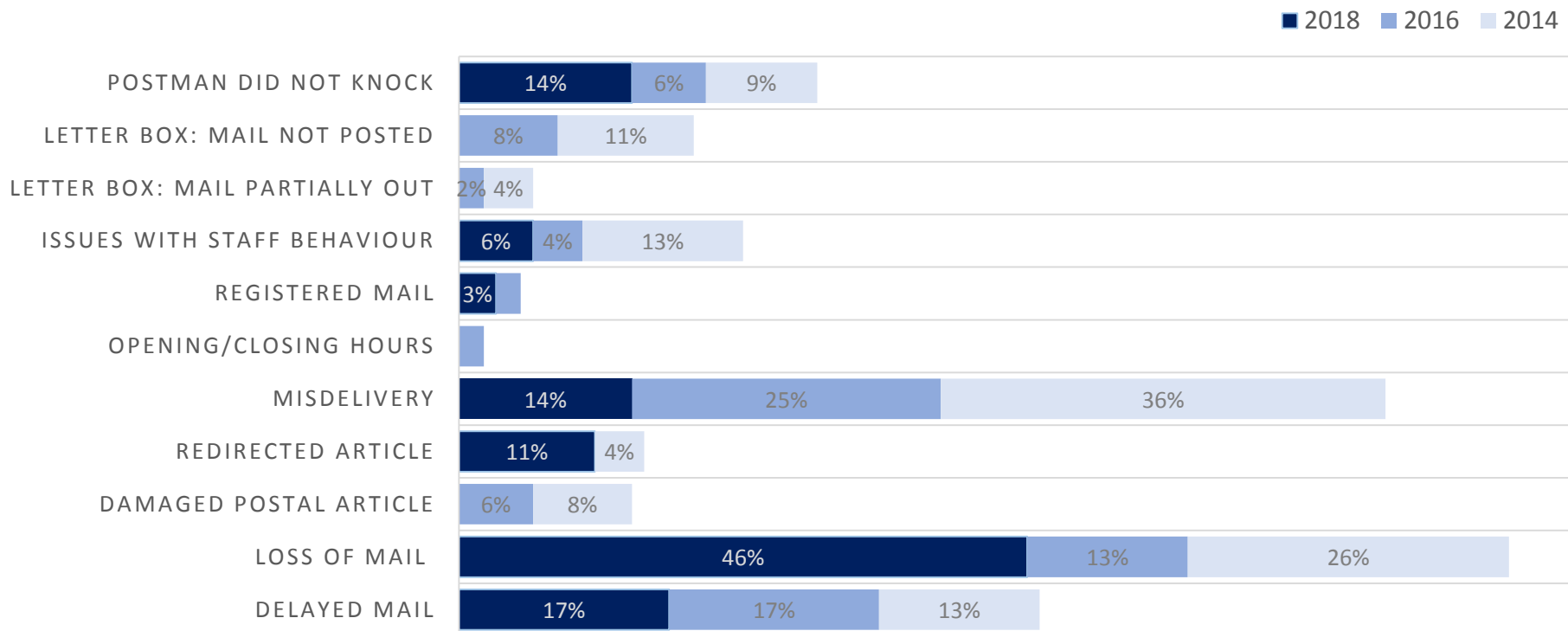
■ 2018

Reasons for Complaint(s)

Number of Respondents: 35 (2018), 52 (2016), 53 (2014)

(Question was answered by those who previously indicated that they had contacted MaltaPost to make a complaint. Respondents were allowed multiple responses.)

The most common complaint was loss of mail, at 46%, followed by delay of mail (17%).

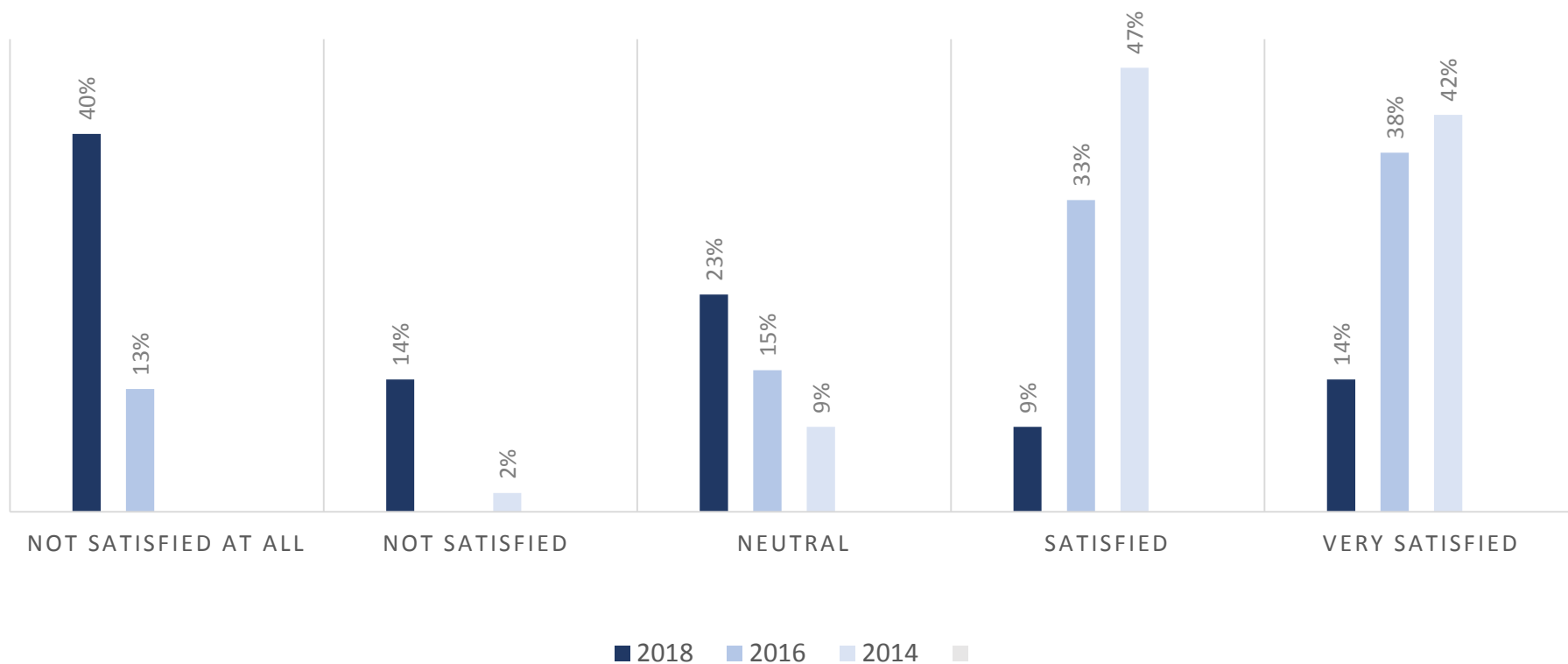


Satisfaction with how a Complaint is Handled

Number of Respondents: 35 (2018), 52 (2016), 53 (2014)

(Question was answered by those who previously indicated that they had contacted MaltaPost to make a complaint.)

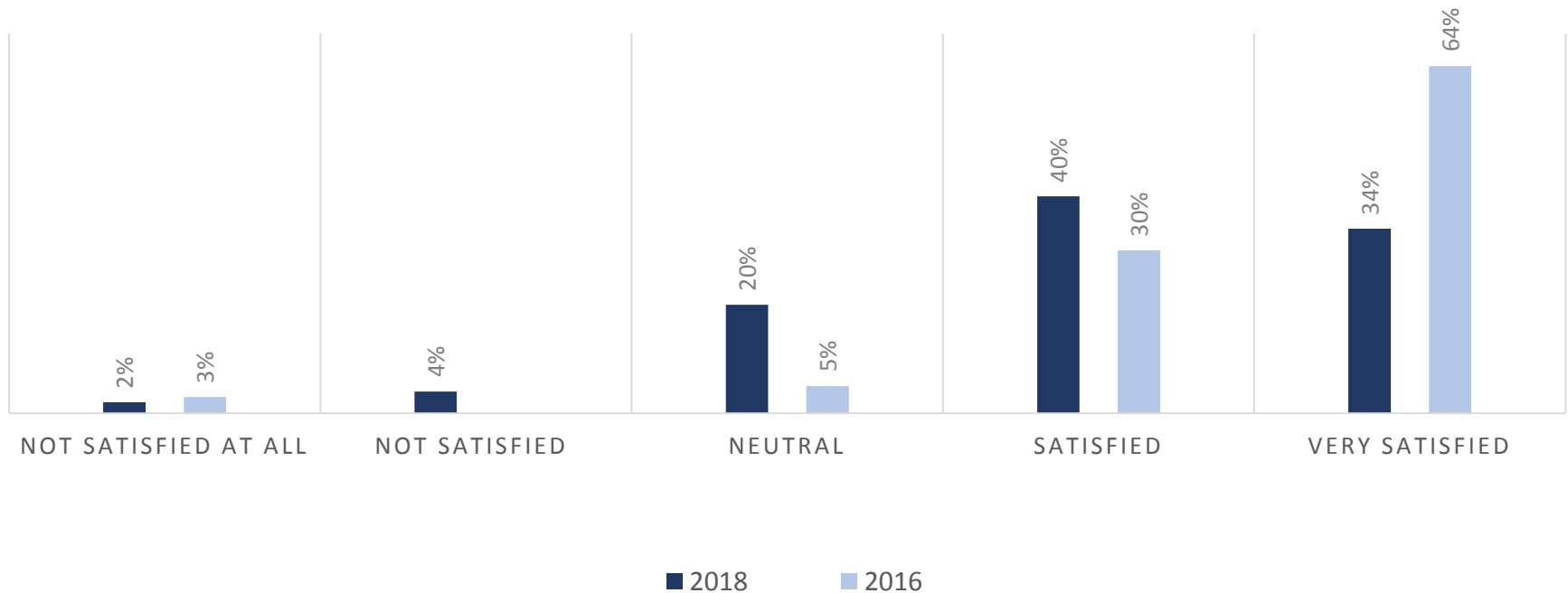
21% of respondents were satisfied with how the complaint was dealt with (71% in 2016), Conversely, 54% were not satisfied (13% in 2016).



Overall Satisfaction with Malta Post's Postal Services

Number of Respondents: 500

74% of respondents claimed that they are satisfied with the overall quality of the postal services (94% in 2016).



Highlights

Main Highlights (1)

Letter Mail (1/2):

- **Letter mail volumes** have generally stayed the same or decreased, as reported by the sample group for both letters sent and letters received
- The most common **types of letter correspondence** received are Business and Government correspondence, while personal communication is the most common type of letter correspondence sent.
- People cite email and use of voice communications as the primary **reasons for the decreases** in letter mail volumes.
- The majority of people (56%) prefer to post a letter between 7:30 and 12:30 am.

Main Highlights (2)

Letter Mail (2/2):

- Most people (62%) are aware of MaltaPost's **online post-code finder**, and very few people report never writing a postcode.
- Most people (67%) would not consider switching to postal alternatives in the case of a 5-10% **increase in letter mail prices**.
- In general, respondents prefer **next day delivery**, and would not opt for deferred delivery at a cheaper tariff rate.
- 13% of respondents report a **5-day week** as a major inconvenience and the majority would find a **5-day week** as workable or acceptable. However, people are divided if they would agree with price increases to maintain the 6-day service.

Main Highlights (3)

Parcel Mail (1/2):

- **Parcels received** has generally stayed the same or increased for most households. Most respondents have received parcels by MaltaPost (83%) or DHL (60%).
- 57% of respondents are **aware of parcel lockers** in Malta, and of these 19% have used a parcel locker. Of the respondents who have used parcel lockers, 55% have used them to avoid missing a delivery.
- The vast majority of people (93%) prefer **receiving parcels at home**. If this delivery is missed, 85% would rather collect the parcel from the nearest post office on the next day.
- 18% of respondents surveyed have used **forwarding services**, and the majority (79%) did so because the vendor did not offer a shipping service to Malta.

Main Highlights (4)

Parcels (2/2):

- 14% of respondents **used MaltaPost to send a parcel**; the majority of whom addressed their parcel to a foreign European address.
- People are generally reasonably satisfied with both **MaltaPost's pricing** and its service, when it comes to foreign parcel delivery.
- 3% of respondents **used a different operator** to send parcels. They report being very satisfied with these other operators, and choose their services because they are more reliable and faster.

Registered Mail:

- 33% have **sent registered mail** in the last 12 months, and 4% send registered mail frequently.
- Most people find **registered mail pricing** to be reasonable (45%), however less reasonable than 2016 on average.

Main Highlights (5)

MaltaPost:

- 69% of people do not use **MaltaPost's website**. Those who do (19%) do so primarily to track parcels.
- 73% of respondents **visited the post office** within the last 12 months [every quarter (31%) or every month (18%)]. Parcel collection (46%) and payment of bills (42%) are the most common **reasons people visit Post Offices**.
- While 76% of respondents are satisfied with the Postal Office Opening hours, less people (55%) are as satisfied with waiting times.
- 15% of people have **contacted MaltaPost** within the last 12 months, and of those, 45% contacted MaltaPost to issue a complaint.
- 21% of respondents report being **satisfied with how a complaint was handled**.
- 74% of respondents are satisfied or very satisfied with MaltaPost's overall service.



Thank You

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