

Survey findings on households' perceptions of postal services

Presentation of main findings

April 2024

Reference number : MCA/S/24-5243



MALTA COMMUNICATIONS AUTHORITY

Purpose

To present survey findings on usage of postal services by households in Malta and to outline factors influencing perceptions and decisions regarding the use of these services.

Main factors that are outlined throughout the presentation:

- ✓ Expenditure;
- ✓ Service usage – letter mail and parcel mail ;
- ✓ Acceptable lead time from posting to delivery of mail;
- ✓ Quality of service.

Key insights



Key Insights (1/5)

- **Expenditure on postal articles**

- 46% of respondents spent up to €5 in the previous 12 months (41% in 2021);
- While most spending brackets saw a rise, the €20 to €30 range held steady at 5%.

- **Letter mail received**

- 66% of respondents report no change in number of letters received per week, whilst 28% report a decrease;
- 6% report an increase.

- **Letter mail sent**

- 33% say they did not send any letters in the previous 12 months (40% in 2021);
- 39% of respondents report no change in number of letters sent per week, whilst 26% report a decrease;
- 2% report an increase in the number of letters sent.

Key Insights (2/5)

- **Acceptable lead time**
 - 46% of respondents state that a 'Next Day' delivery is acceptable (39% in 2021);
 - 39% of respondents consider that a 2-day delivery time is acceptable (48% in 2021).
- **A 5-day week instead of a 6-day week**
 - 62% say that a 5-day delivery postal service is acceptable (58% in 2021), while 5% see the reduction as 'inconvenient but workable' (9% in 2021);
 - An unchanged 12% of respondents (2023 vs 2021) find the reduction of one day a major inconvenience.
 - 62% of respondents consider **a price increase to maintain a 6-day service** as reasonable (61% in 2021).
- **33% of respondents say they sent registered mail** (38% in 2021).
- 60% of households are willing to **pay an optional stamp surcharge** to support environmental initiatives.

Key Insights (3/5)

- **Foreign parcels received**
 - 28% of respondents reported an increase in parcels received (31% in 2021);
 - 8% reported a decrease (11% in 2021).
- **Delivery of goods ordered from local websites**
 - 56% of households received deliveries of goods ordered from local websites (69% in 2021).
- 9% of respondents say they **use of MaltaPost service to send parcels locally** and 18% say they use this operator to send parcels **abroad**;

Key Insights (4/5)

- MaltaPost's pricing of international parcel mail delivery is deemed reasonable by 48% of respondents (45% in 2021).
- Service satisfaction with MaltaPost's parcel sending service unchanged over two studies (71% in 2023 and 72% in 2021).
- 44% of respondents stated that DHL delivered their parcels (35% in 2021) – whilst 37% of respondents replied that MaltaPost delivered their parcels (49% in 2021).
- 16% of households reported that they have used parcel lockers (14% in 2021).
- Visiting a MaltaPost outlet
 1. 70% of households visited a MaltaPost outlet in the 12 months before this survey (62% in 2021)
 2. 84% visited a MaltaPost branch (80% in 2021)
 3. 10% visited a MaltaPost sub-office (15% in 2021)
 4. 6% visited both (5% in 2021)

Key Insights (5/5)

- **48% say they visited a MaltaPost outlet** to pay bills (38% in 2021) followed by 39% to collect a parcel (47% in 2021).
Another **50% visited a sub-post office to collect parcels (56% in 2021) followed by 32% to pay bills (31% in 2021)**.
- **15% of respondents contacted MaltaPost (19% in 2021)** with **four out of every ten contacts ask about parcel status (41% in 2021) and almost three out of every ten contacts inquire about a postal product or service (23% in 2021)**.
- **Overall satisfaction with MaltaPost services at** 72% of respondents saying they are satisfied or very satisfied with MaltaPost's overall service (70% in 2021).
- **Complaints** were lodged with MaltaPost by 15% of respondents (34% in 2021).
- **Reasons for complaints**
 - 45% reported mis-delivery of mail (27% in 2021) – 36% reported missing mail (40% in 2021).
- **Maltapost's satisfactory resolution of complaints** stood at 46% of those lodging a complaint (34% in 2021).

Methodology



Methodology

EMCS Advisory Ltd carried out survey fieldwork between November and December 2023

Fieldwork

- 20-minute telephone interviews;
- Randomly-selected sample;
- One respondent per household, aged 18 or over.

Sample

- Stratified target respondents - stratified according to age composition (18+) of Maltese population;
- Sample distribution: Malta's six geographical regions + socio-economic categories.

Responses

- 501 net valid respondents were collected;
- Margin of error +/-4.38% at 95% confidence interval;
- Any refusals / incomplete surveys were removed and replaced with new responses.

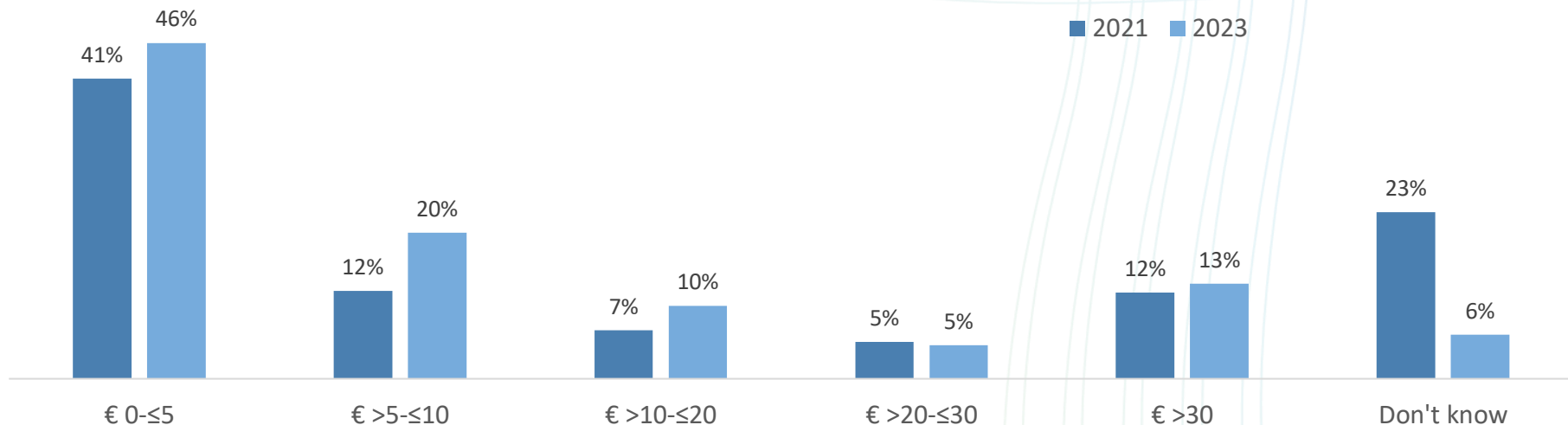
Activity-based expenditure



Activity-based expenditure

Money spent on posting articles during the twelve months prior the survey

Total number of respondents: 499 (2021), 501 (2023)



- 46% of households reported spending between €0 - €5 on posting articles during the twelve months prior to the survey (41% in 2021). Similarly, there is an upward trend in higher expenditure categories, with the percentage of households spending between €5 to €10 increasing from 12% to 20%, and those spending between €10 to €20, which rose from 7% to 10%.

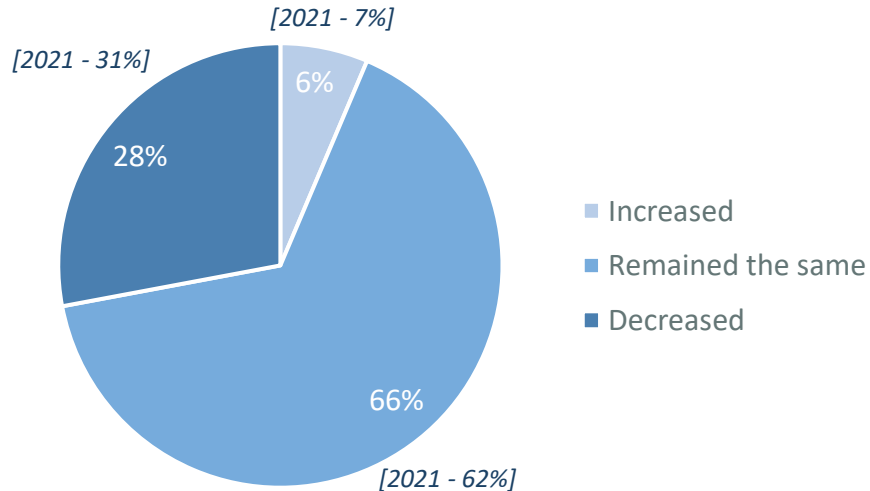
Letter Mail



Letter Mail (1 of 7)

Volume change in addressed letter mail received by household each week

Total number of respondents: 499 (2021), 501 (2023)

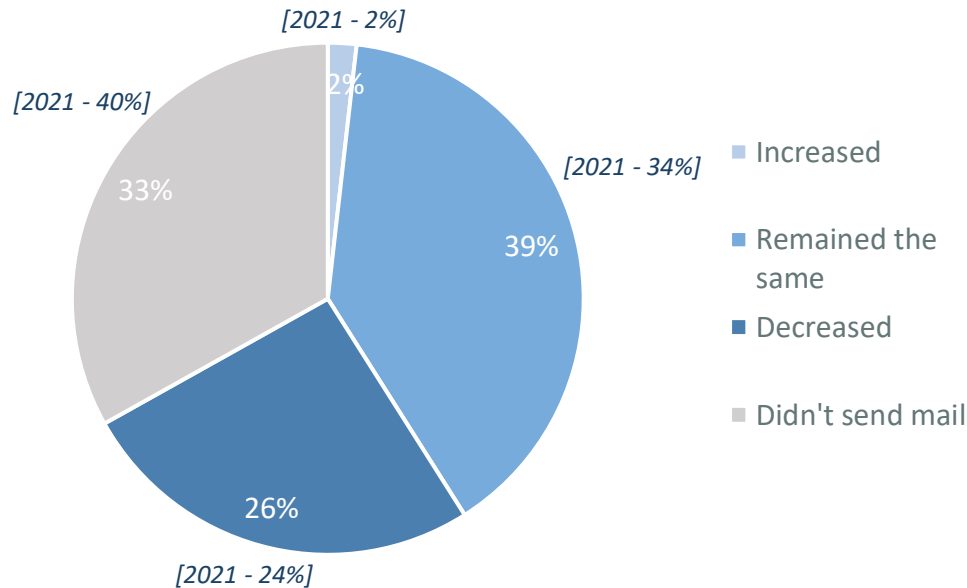


- The majority of households (66%) reported that the frequency of addressed letters received has remained the same (62% in 2021).
- Only 6% of households experienced an increase in addressed letters (7% in 2021).
- Conversely, the percentage of households observing a decrease has declined slightly from 31% to 28%.

Letter Mail (2 of 7)

Volume change in addressed letter mail sent by households

Total number of respondents: 499 (2021), 501 (2023)

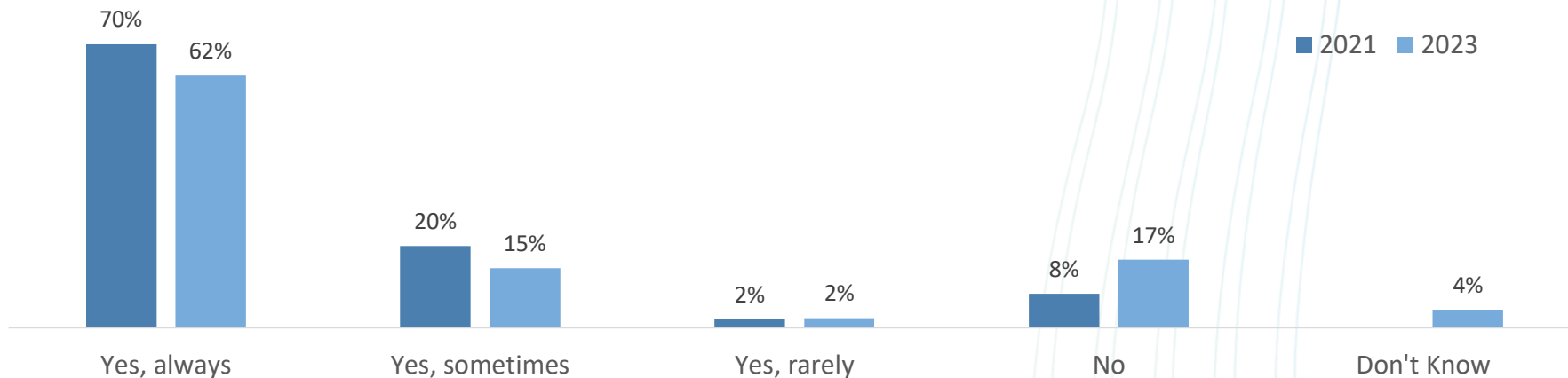


- Although there has been a small increase in the proportion of households indicating that the quantity of addressed letters sent has remained consistent, climbing from 34% in 2021 to 39% in 2023, there has also been a 2-percentage-point increase in those reporting a decrease (from 24% to 26%).
- The data also reflects a decline in the percentage of households not sending mail, dropping from 40% in 2021 to 33% in 2023, whilst the percentage of households reporting an increase in the number of letters sent remained unchanged at 2%

Letter Mail (3 of 7)

Addressed letter mail sent with postcode written

Number of respondents that sent addressed letters over the past 12 months: 300 (2021), 336 (2023)

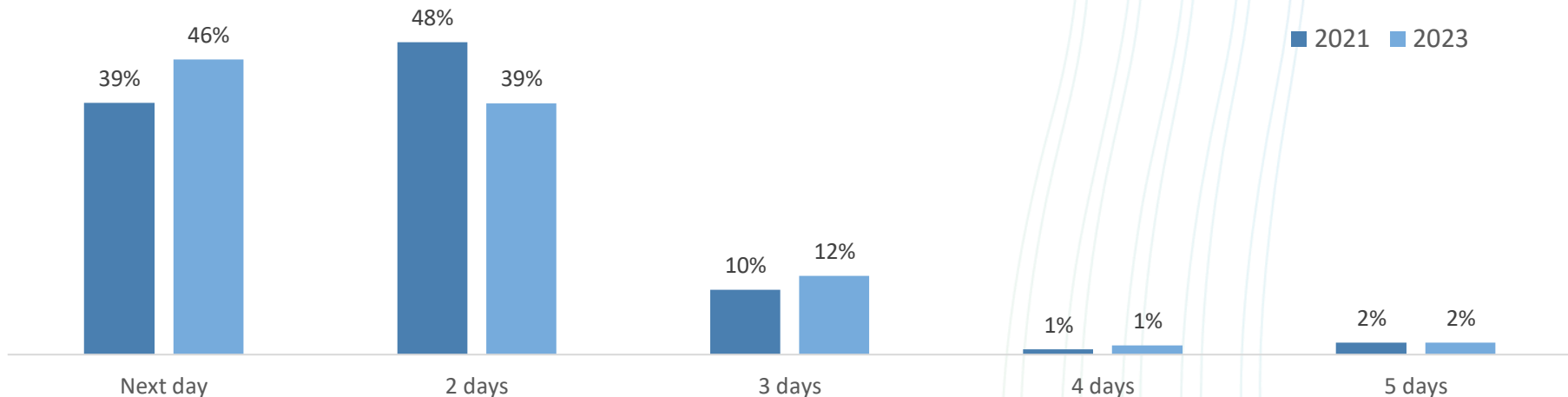


- Percentage of respondents who stated they do not include postcodes increased from 8% in 2021 to 17% in 2023.
- The "Don't Know" option was not available among the choices in 2021.

Letter Mail (4 of 7)

Acceptable lead time from posting to delivery

Total number of respondents: 499 (2021), 501 (2023)

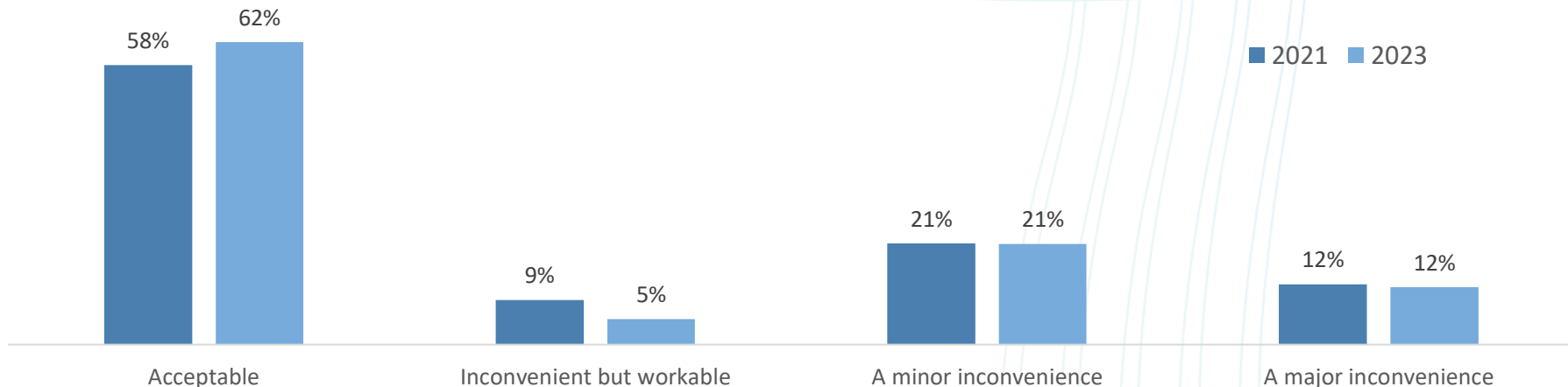


- 46% of respondents consider a 'next day' delivery as acceptable, indicating an increase from the 39% recorded in 2021.
- Following closely is the preference for a '2-day' lead-time, although this has decreased from 48% in 2021 to 39% in 2023.

Letter Mail (5 of 7)

A 5-day week instead of a 6-day week

Total number of respondents: 499 (2021), 501 (2023)

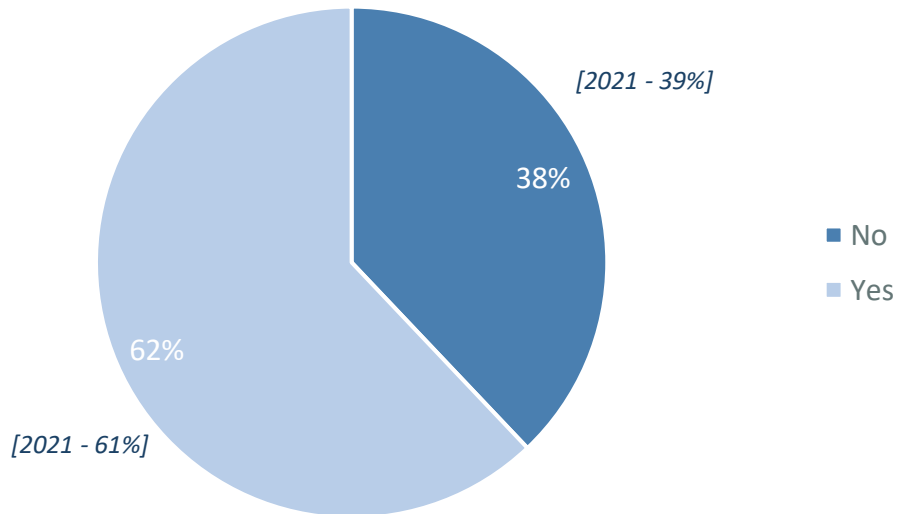


- 62% of respondents find a 5-day delivery schedule acceptable (58% in 2021).
- The percentages for those considering it as a minor inconvenience or a major inconvenience have remained stable at 21% and 12% respectively in both studies. 5% indicated that it is inconvenient but workable (9% in 2021).

Letter Mail (6 of 7)

Should prices increase to maintain a 6-day service?

Total number of respondents: 499 (2021), 501 (2023)



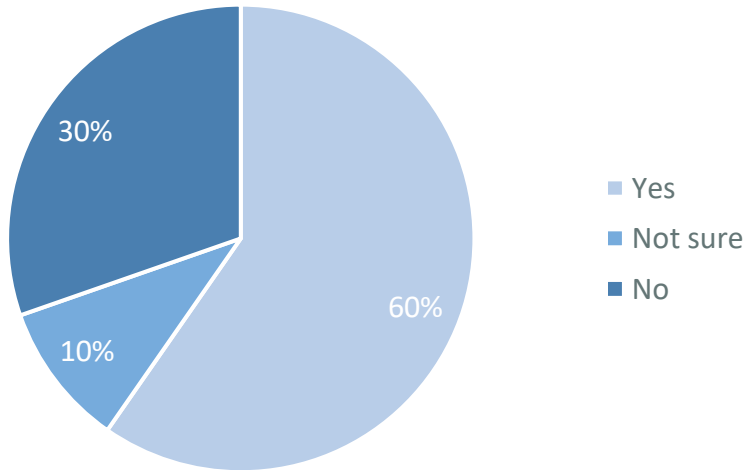
- 62% would consider it reasonable if prices were to increase in order to maintain the current 6-day frequency of delivery (61% in 2021).
- The relatively high percentage of households willing to pay a premium price to maintain the 6-day service is somewhat paradoxical with the high percentage of households (83%) who responded that a 5-day postal service was either acceptable or just a minor inconvenience. (see previous slide)

Letter Mail (7 of 7)

Exploring an optional surcharge for environmental initiatives

Total number of respondents: 501 (2023)

(This question was not asked in 2021)



Almost 60% of respondents express willingness to pay an optional stamp surcharge, indicating a significant level of support for environmental initiatives within the context of postal services.

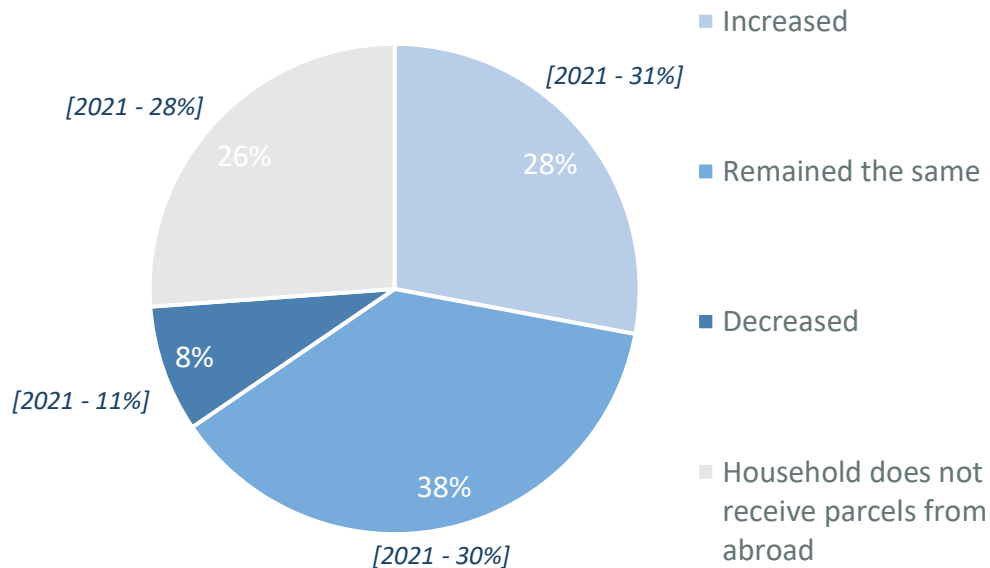
Parcel Mail



Parcel Mail (1 of 13)

Volumes of foreign parcels/packages received in the twelve months prior to the survey

Total number of respondents: 499 (2021), 501 (2023)



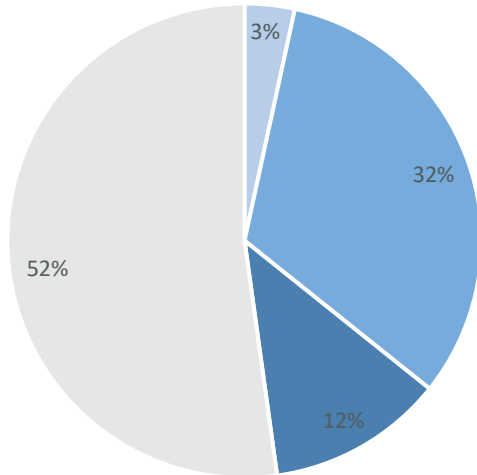
- 38% of households reported that the number of foreign parcels / packets received remained constant in twelve months prior to the survey, marking an increase of 8 p.p compared to the previous study.
- A further 28% noted an increase in such deliveries (31% in 2021). Conversely, 8% reported a decrease in foreign parcels (11% in 2021).
- More than one-fourth of respondents (26%) stated that their household does not receive parcels from abroad (28% in 2021).

Parcel Mail (2 of 13)

Volumes of domestic parcels/packages received in the twelve months prior to the survey

Total number of respondents: 501 (2023)

(Due to differences in sample sizes, direct comparisons with the previous study in 2021 could not be made)



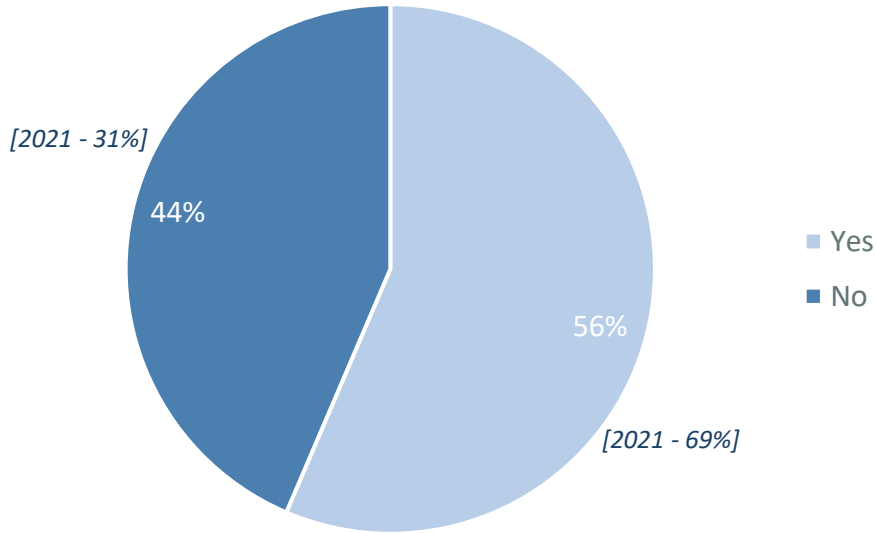
- Increased
- Remained the same
- Decreased
- Household does not receive domestic parcels

- 32% of households noted that the number of domestic parcels in the twelve months prior to the survey remained constant.
- Furthermore, 12% reported a decrease in domestic parcels, whilst 3% reported an increase in such deliveries.
- More than half of the respondents (52%) stated that their household does not receive domestic parcels.

Parcel Mail (3 of 13)

Delivery of goods from orders placed on local websites in the twelve months prior to survey

Number of respondents stating they received domestic addressed parcels/packages: 360 (2021), 241 (2023)



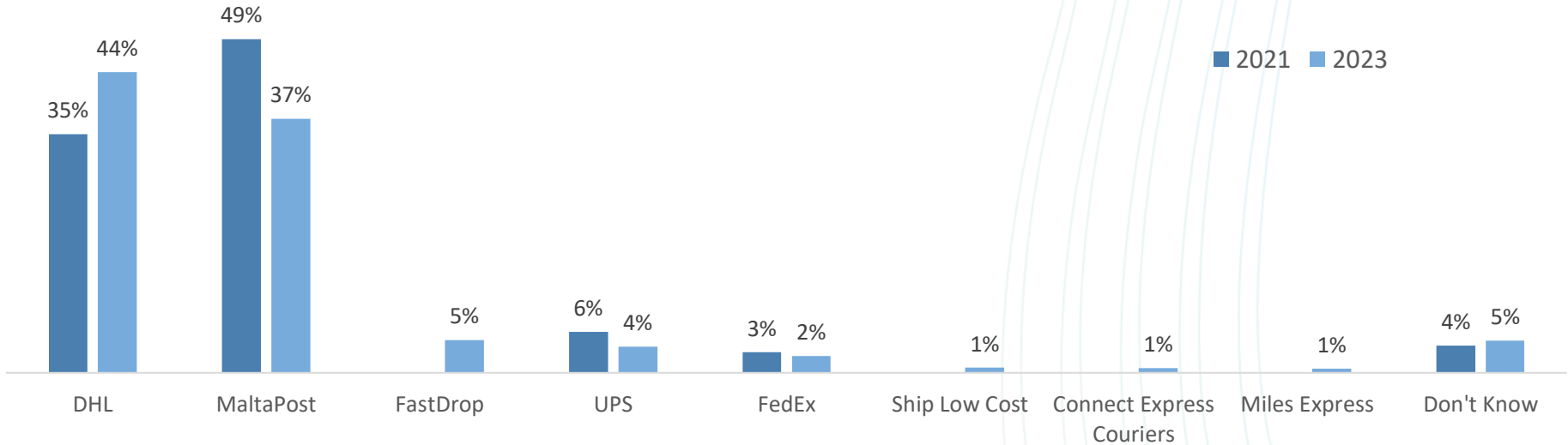
- 56% of households reported having received deliveries from orders placed on local websites (69% in 2021).

Parcel Mail (4 of 13)

Respondents were asked which operator/s delivered most parcels to their address

Number of respondents who received addressed parcels/packets in the 12 months prior to survey: 360 (2021), 374 (2023)

(Ranking question)



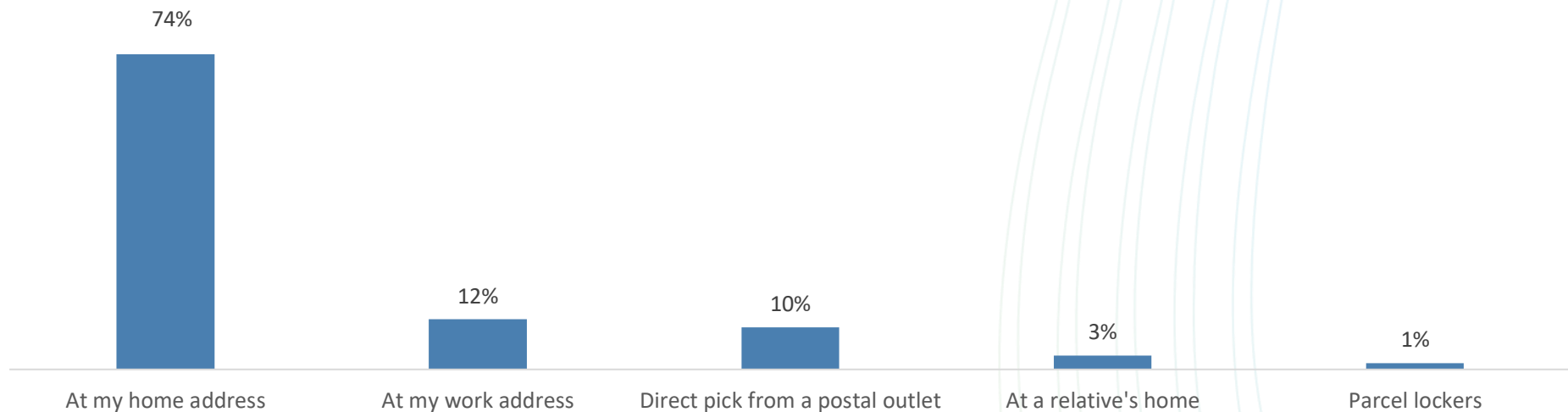
Parcel Mail (5 of 13)

Preferred way to receive a parcel

Number of respondents who received addressed parcels/packets in the 12 months prior to survey: 360 (2021), 374 (2023)

Ranking question

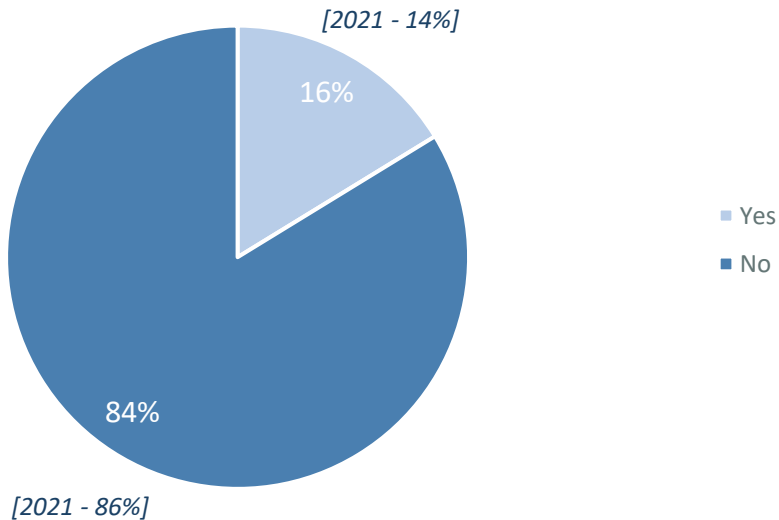
(A comparison could not be made due to different answer options in 2021)



Parcel Mail (6 of 13)

Use of parcel lockers

Number of respondents who reported that their household receives domestic/foreign addressed parcels/packages: 360 (2021), 374 (2023)



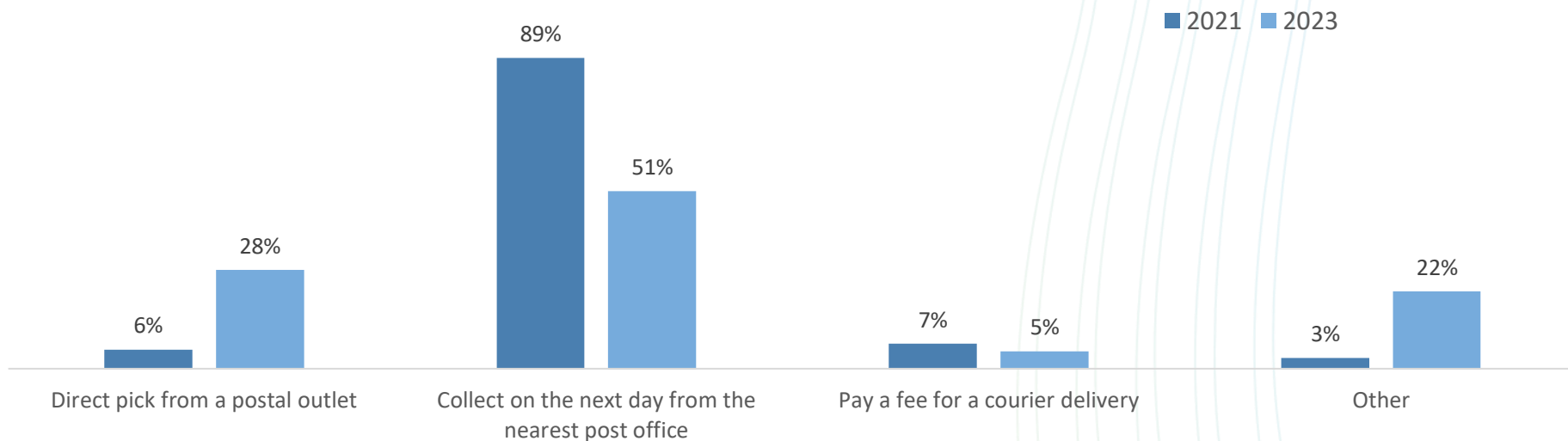
In the current study, 16% of respondents reported using parcel lockers (an increase of only 2% from the previous study).

Parcel Mail (7 of 13)

Preferred way to collect a parcel if a delivery is missed

Number of respondents who received addressed parcels/packages in the 12 months prior to survey: 360 (2021), 374 (2023)

(Respondents could give multiple replies)

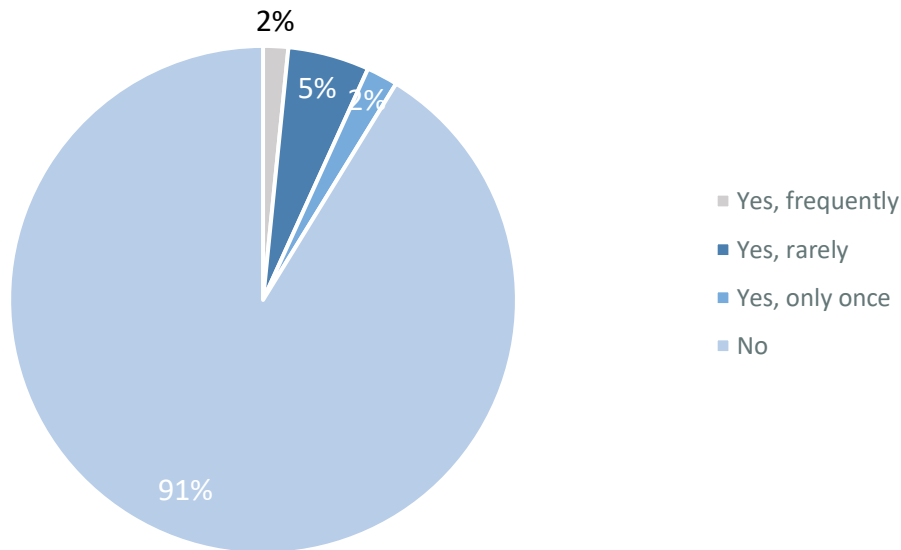


Parcel Mail (8 of 13)

Domestic parcels sent using MaltaPost

Total number of respondents: 501 (2023)

(A comparison could not be made due to variations in the question format used in 2021)



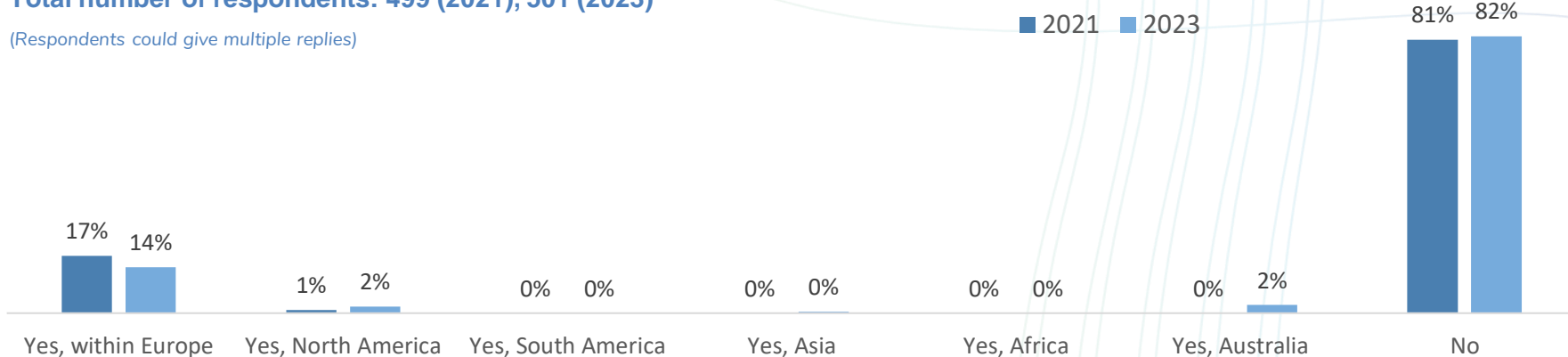
- The majority of respondents (91%) indicated that neither they, nor anyone in their household had sent a domestic parcel using MaltaPost's service during the 12 months prior to the survey.
- Amongst those who did use the service, 2% reported frequent usage, whilst the percentage of respondents sending parcels rarely stood at 5%.

Parcel Mail (9 of 13)

Foreign parcels sent using MaltaPost service

Total number of respondents: 499 (2021), 501 (2023)

(Respondents could give multiple replies)

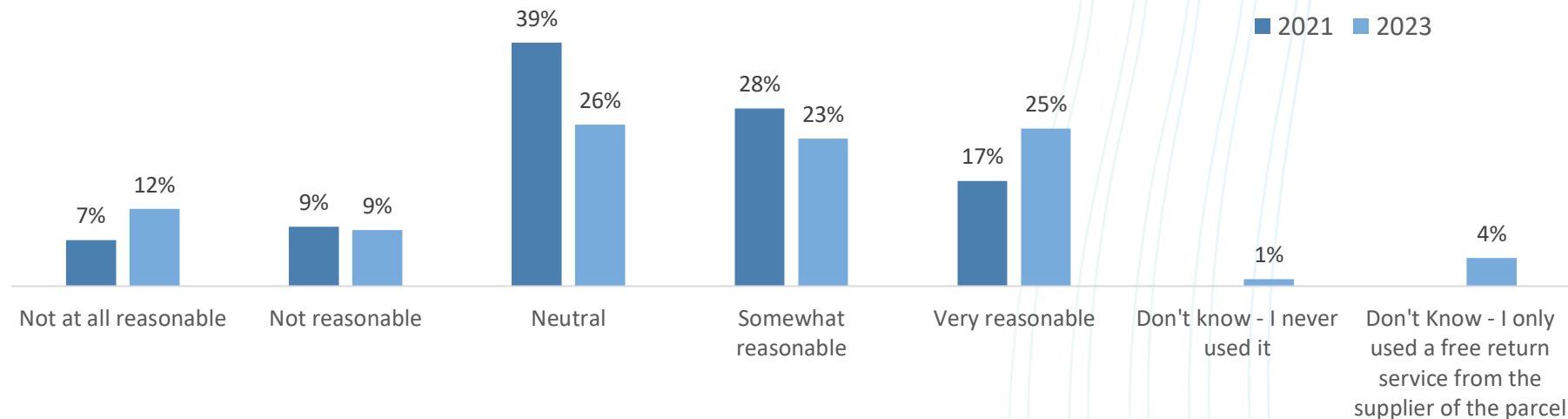


- The majority of those who send international parcels opt for European destinations, which constituted 14% in 2023.

Parcel Mail (10 of 13)

Analysis of MaltaPost's pricing for overseas parcel delivery

Number of respondents saying they sent parcels overseas using MaltaPost during the 12 months prior to the survey: 95 (2021), 90 (2023)

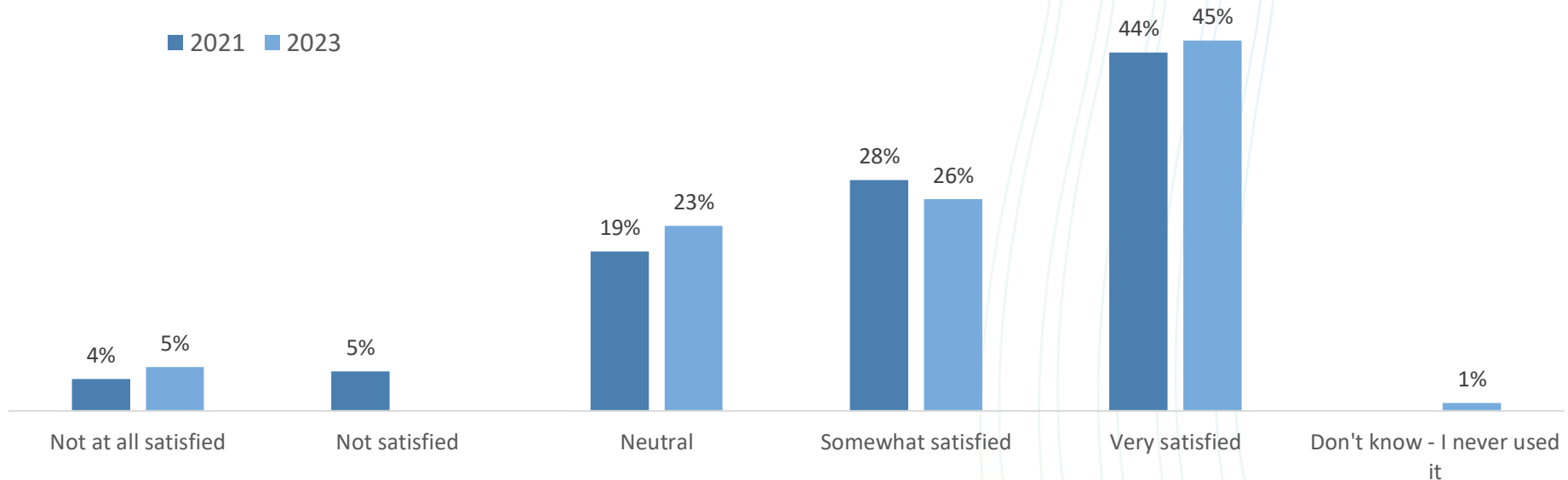


- 48% found the pricing reasonable (45% in 2021), whilst 21% considered it unreasonable (16% in 2021).
- It is important to note that the 'Don't Know' options were not provided in the 2021 study.

Parcel Mail (11 of 13)

Satisfaction with sending a parcel/package using MaltaPost's service

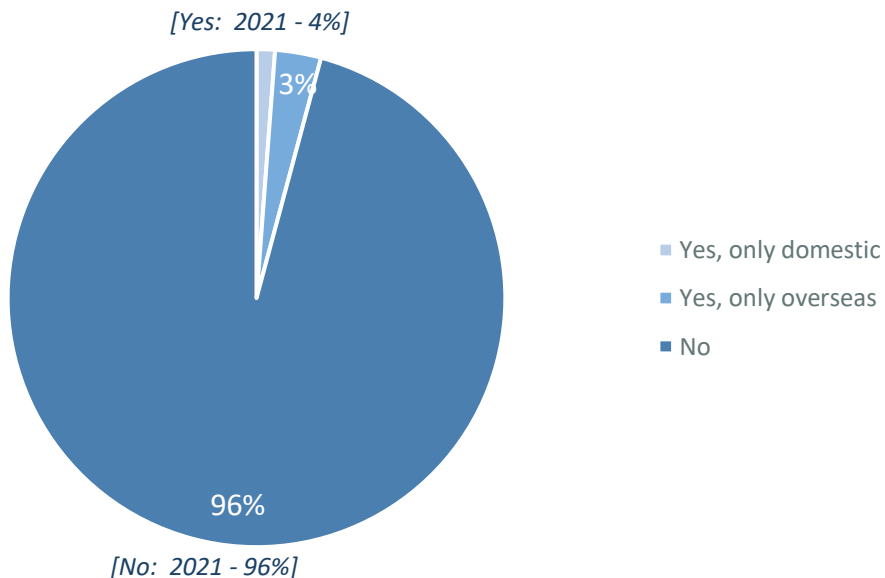
Number of respondents who sent parcels overseas using MaltaPost during the 12 months prior to the survey: 95 (2021), 90 (2023)



Parcel Mail (12 of 13)

Other operators (excluding MaltaPost) used to send a parcel within the twelve months prior to the survey.

Total number of respondents: 499 (2021), 501 (2023)

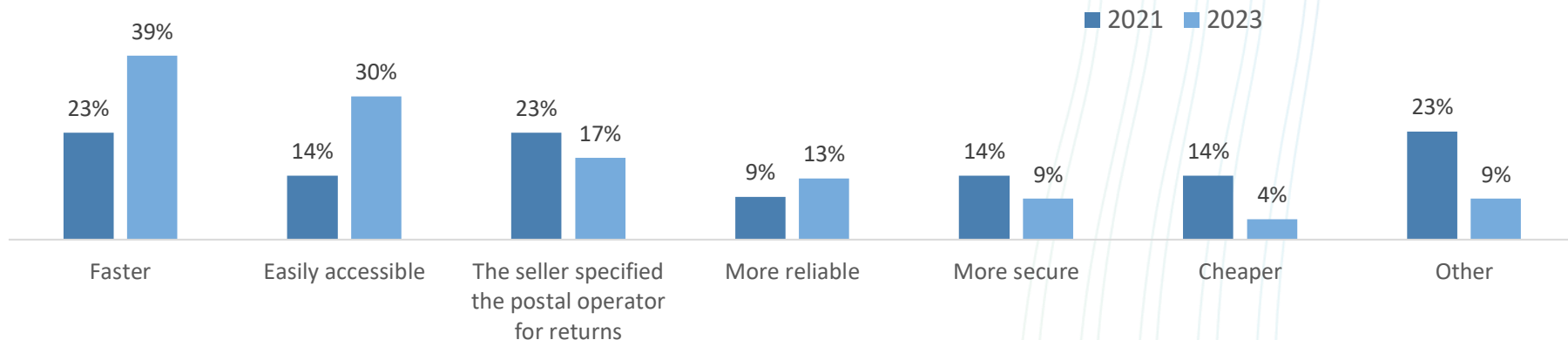


- Similar to the previous study, 96% indicated not using services from other operators.
- Conversely, 3% of the respondents reported using other operators to send parcels overseas, whereas 1% indicated using other operators for sending parcels within Malta.

Parcel Mail (13 of 13)

Reasons for using other operators

Number of respondents who reported that someone in their family or themselves sent a parcel using other operators: 22 (2021), 23 (2023) (Respondents could give multiple replies)



- The primary reason for using other operators was speed of delivery, cited by 39% of respondents, marking a 16 p.p. increase. This was followed closely behind by the convenience of accessibility, with 30% expressing this preference (14% in 2021).
- Furthermore, 17% indicated that the seller's specification of the postal operator for returns influenced their choice (23% in 2021).
- 2 respondents (9%) were unable to specify the reasons why they or other family members opted for other operators.

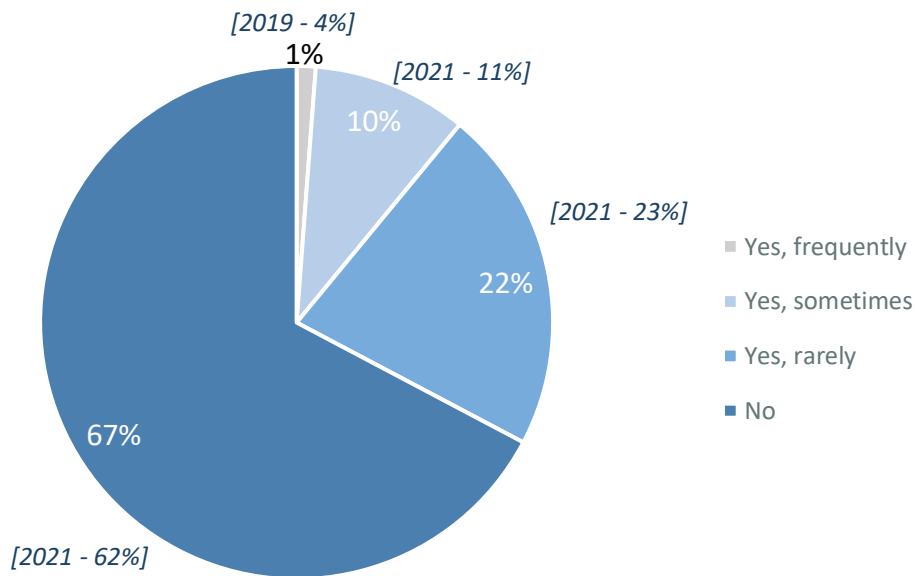
Registered Mail



Registered Mail (1)

Registered mail sent

Total number of respondents: 499 (2021), 501 (2023)



- 33% of respondents have sent registered mail in the 12 months prior to the survey (38% in 2021).
- Similar to the previous study, amongst those who engage in sending registered mail, 22% reported doing so rarely, 10% indicated doing it sometimes, and 1% mentioned doing it frequently.

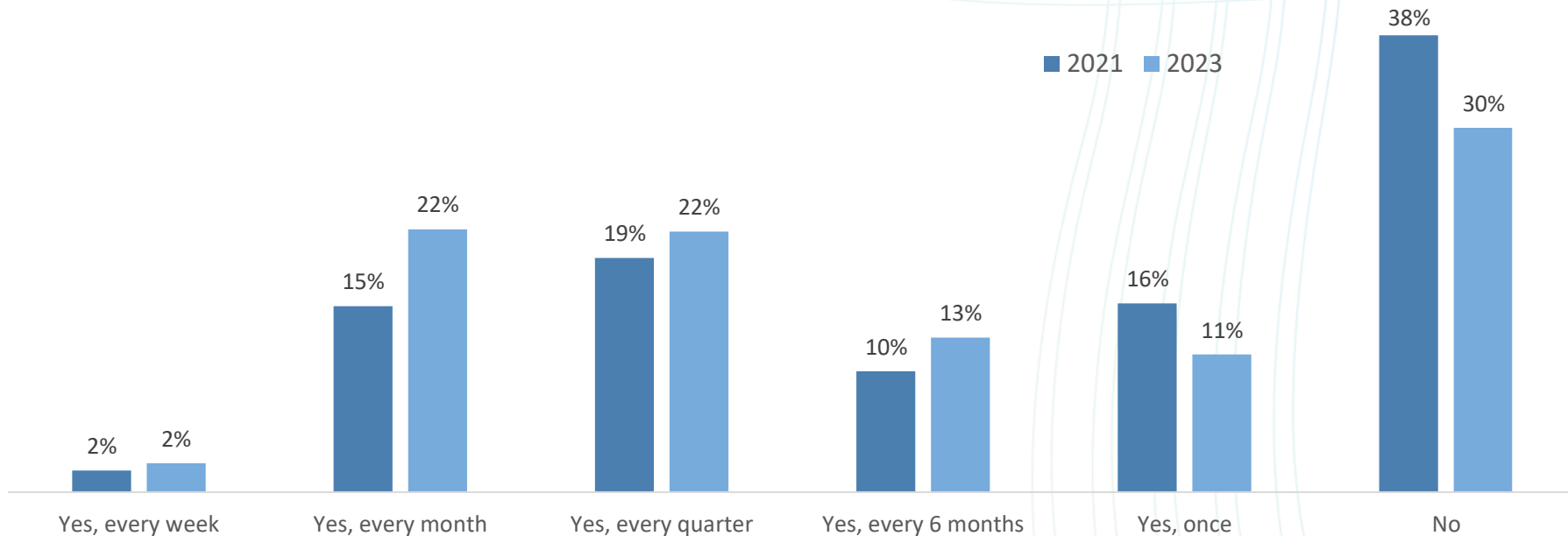
Use of services offered at MaltaPost's outlets



MaltaPost's Outlet Services (1 of 4)

Visits to a postal outlet

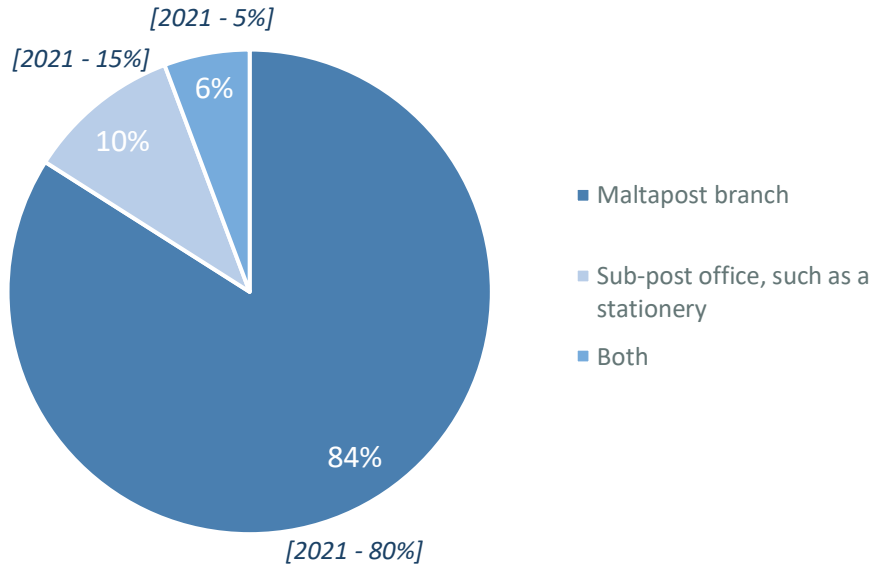
Total number of respondents: 499 (2021), 501 (2023)



MaltaPost's Outlet Services (2 of 4)

Which kind of post office did you visit ?

Number of respondents who indicated that in the past 12 months they have visited a postal outlet: 310 (2021), 350 (2023)

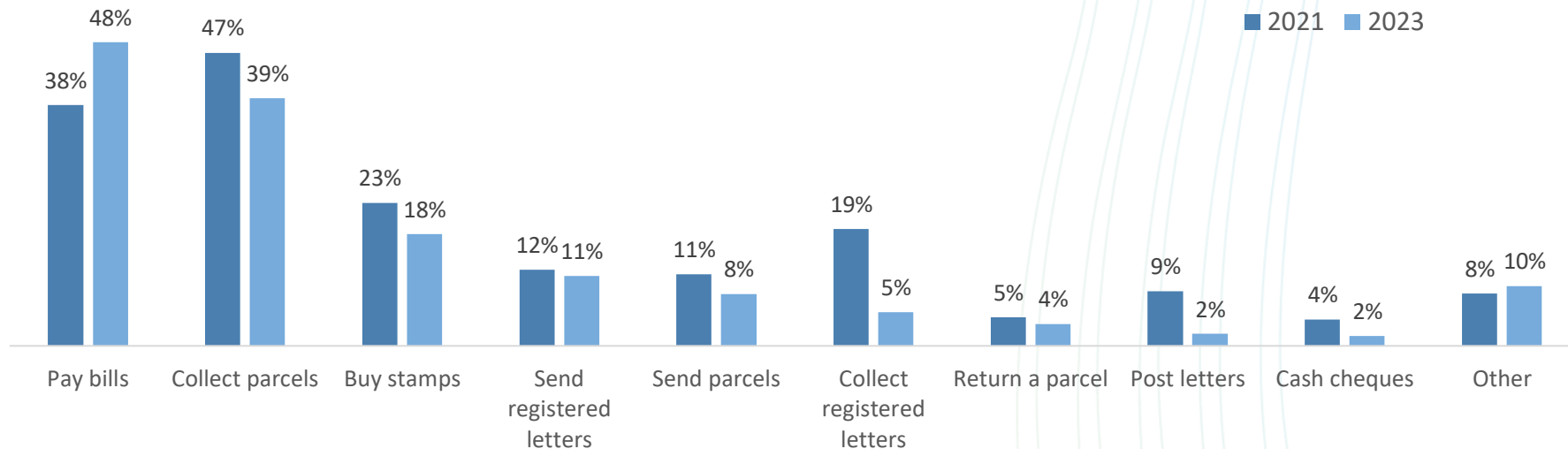


- The data regarding the type of post office visited by respondents indicates a predominant preference for MaltaPost branches, with 84% of individuals choosing this option (80% in 2021).
- Conversely, visits to sub-post office decreased from 15% in 2021 to 10% in 2023.
- A small percentage of respondents (6%) reported visiting both types of post offices (5% in 2021).

MaltaPost's Outlet Services (3 of 4)

Reasons for visiting the MaltaPost branch

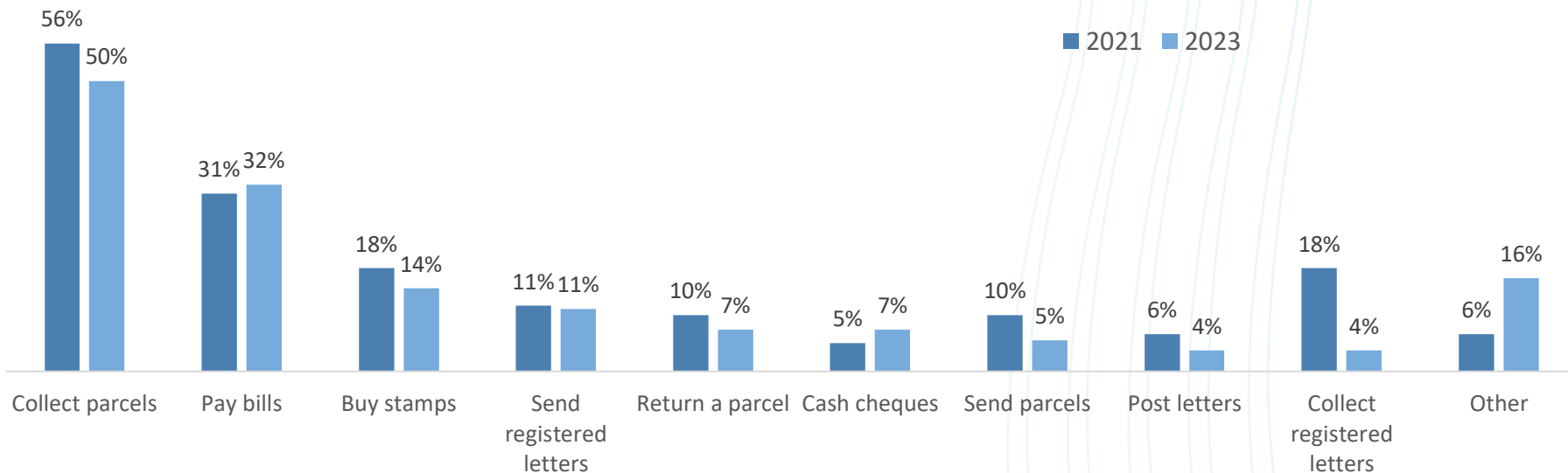
Number of respondents who indicated visiting the MaltaPost branch: 263 (2021), 314 (2023) (Respondents could give multiple replies)



MaltaPost's Outlet Services (4 of 4)

Reasons for visiting the sub-post office

Number of respondents who indicated visiting the sub-post office: **62 (2021), 56 (2023)** (Respondents could give multiple replies)



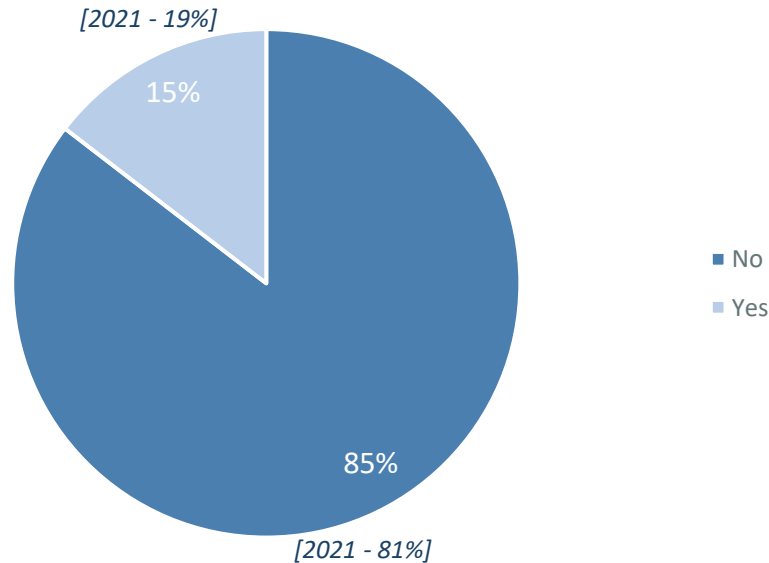
MaltaPost's customer care service



MaltaPost's Customer Care (1 of 5)

Engagement with MaltaPost over the 12 months prior to the survey.

Total number of respondents: 499 (2021), 501 (2023)



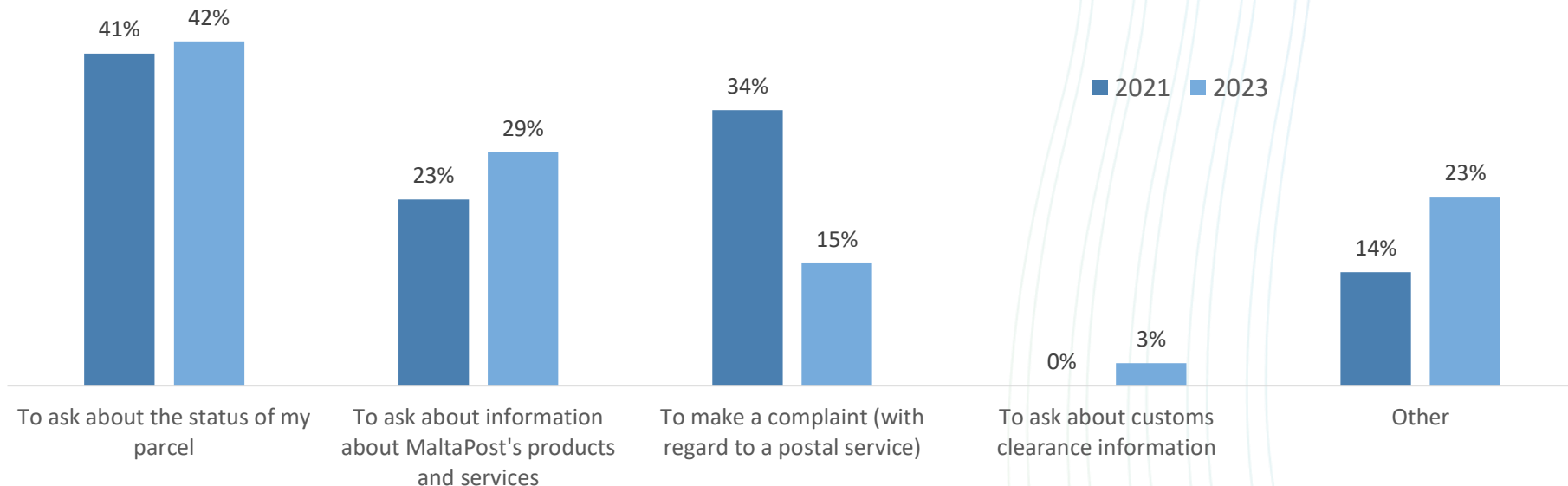
- 15% of respondents reported having contacted MaltaPost, reflecting a decrease of 4% from the previous study.

MaltaPost's Customer Care (2 of 5)

Reasons for contacting MaltaPost

Number of respondents who indicated contacting MaltaPost in the 12 months prior to the survey: 95 (2021), 73 (2023)

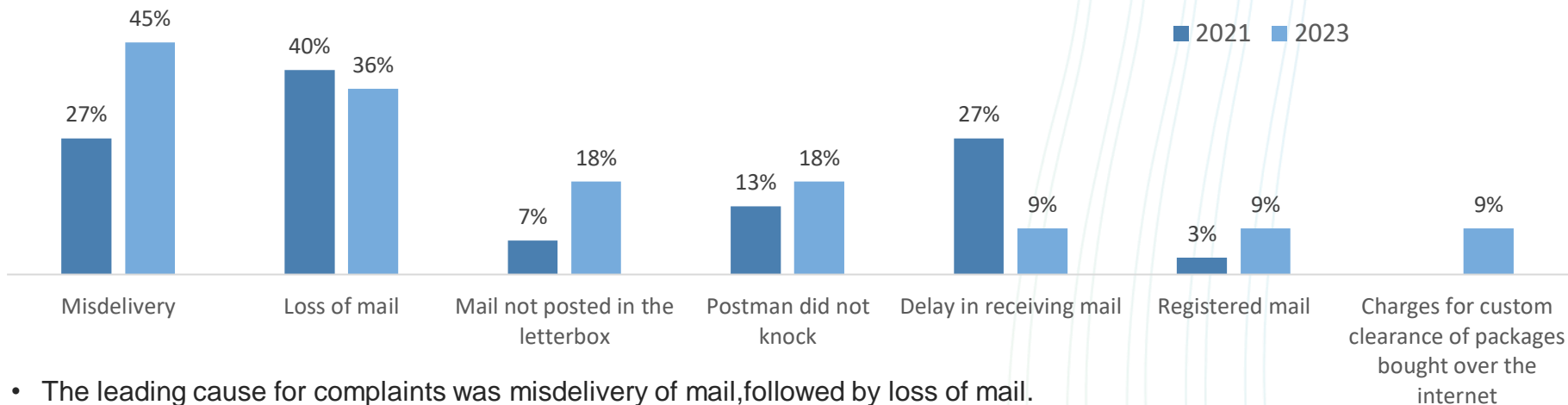
(Respondents could give multiple replies)



MaltaPost's Customer Care (3 of 5)

Reasons for lodging a complaint

Number of respondents who indicated contacting MaltaPost to report a complaint: 30 (2021), 11 (2023) (Respondents could give multiple replies)

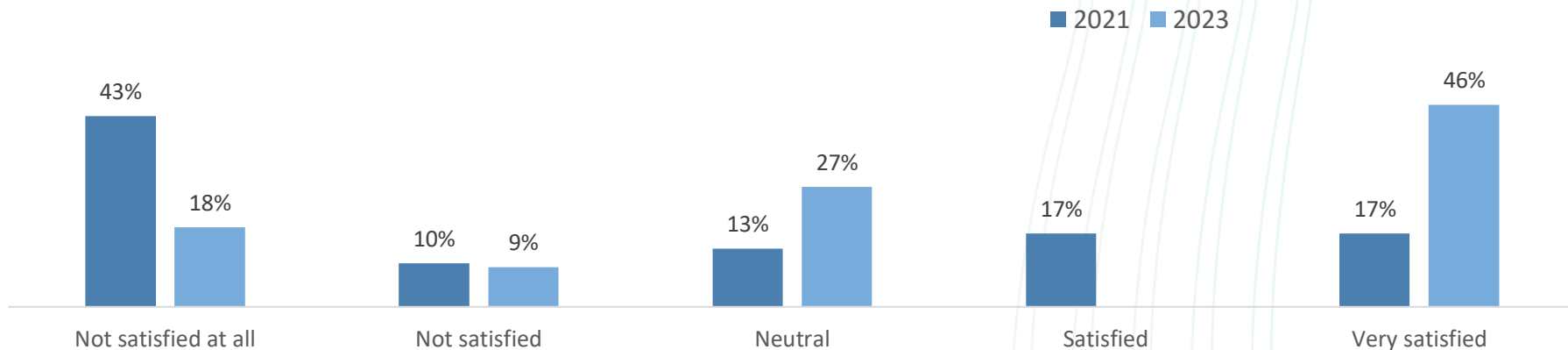


- The leading cause for complaints was misdelivery of mail, followed by loss of mail.
- 18% of respondents reported about mail not being posted in the letterbox and postman not knocking, representing increases from the 7% and 13% mentions respectively in 2021.

MaltaPost's Customer Care (4 of 5)

Satisfaction with how a complaint is handled

Number of respondents who indicated contacting MaltaPost to report a complaint: 30 (2021), 11 (2023)

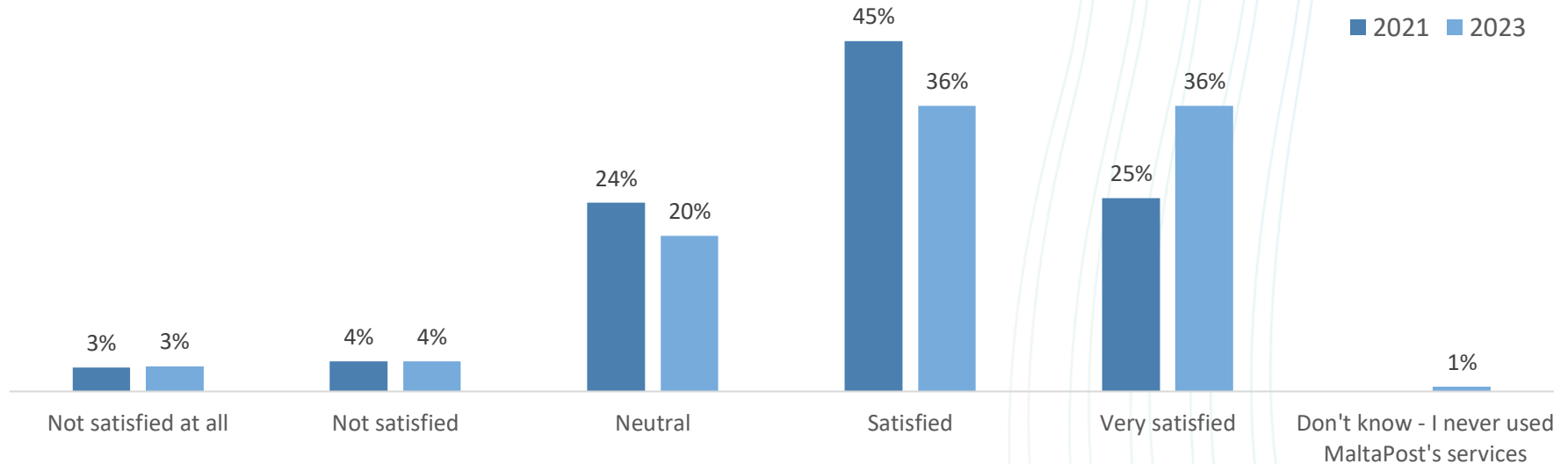


- In the current study, there was a noticeable improvement in satisfaction levels. The percentage of respondents not satisfied at all decreased to 18% from the 43% reported in 2021, and a significant increase was observed in those reported being very satisfied, rising from 17% in 2021 to 45% in 2023.

MaltaPost's Customer Care (5 of 5)

Overall satisfaction with MaltaPost's postal services

Total number of respondents: 499 (2021), 501 (2023)



End



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