

## **MCA Postal Perceptions Survey for Maltese Households**

The Malta Communications Authority (MCA) has published the findings of a survey seeking household perspectives on the postal services provided in Malta. The survey's findings are based on the views of 500 participant households, which were contacted by phone between August and October 2021.

### **Quality of service**

On a general level, Maltese households are broadly satisfied with the quality of the postal services on offer. Nonetheless, the 2021 survey shows a 5 percentage point drop in the number of respondents that are satisfied to very satisfied with the service, compared to 2018 (from 74% to 69%). This may be partly due to the challenges encountered over the past two years when it comes to, for example, international mail and the disruptions in this segment brought about by the Covid pandemic.

### **Letter mail activity**

The 2021 survey depicts a very similar picture to that prevailing in 2018 when it comes to letter mail activity (both sent and received). In this regard, the 2021 survey shows that 62% of respondents did not see any change in the number of letter mail items received in the previous 12 months, compared to 59% in 2018. Meanwhile, 31% of respondents reported a decline in letter mail received compared to 34% in 2018. Additionally, 40% of household respondents in 2021 say they did not send any letter mail, compared to 43% of respondents in 2018.

The general trend of falling letter mail activity persists, with respondents to the survey identifying e-communication as the alternative to sending letter mail physically.

### **Usage of post codes**

Closely related to postal usage is the inclusion of post codes in the mail address. Households got more accustomed to writing the post code, with 70% of respondents to the 2021 survey saying they do so compared to 45% of respondents to the 2018 survey.

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### **Parcel mail activity**

Parcel mail activity - in terms of items received from abroad - strengthened in the twelve months preceding the survey fieldwork period. 31% of household respondents report an increase in the number of parcel mail items received in the preceding 12 months, up from 27% in 2018. As indicated by households, the main reason behind this more buoyant parcel mail activity is the prevalence of more frequent online shopping due to the pandemic. Meanwhile, 11% of household respondents say they saw a decrease in the number of received parcel mail items during the previous 12 months. The latter category was however largely affected by Covid-related interruptions and changes in customs procedures, which were deemed to be the two main factors dictating the decline in parcel mail volumes.

70% of household respondents say they had delivery of goods from orders placed on local websites in the past 12 months.

Several providers are active in the delivery service of parcel mail items, with MaltaPost and DHL being the two operators that are mostly referred to by respondents (73% of respondents indicated Maltapost and 57% of respondents indicated DHL).

### **Expenditure on post**

Survey findings suggest that, since 2018, households have generally not changed their reliance on the postal service for sending mail items. 41% of household respondents report having spent less than €5 on posting articles in the preceding twelve months, compared to 42% in 2018. The share of respondents not knowing how much they spent increased by three percentage points to 23% in 2021 compared to 2018.

### **MaltaPost's services**

Many continue to rely on MaltaPost's postal services given that it is the only operator currently active in the provision of inland and cross-border services within the universal service area. This operator is in fact bound by various obligations when it comes to the provision of such services it offers. This involves at least one collection and one delivery on every working day (six days a

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week) of letters, packets, and parcels up to 20kg in weight. A basic counter service (such as at a post office) must also be provided throughout Malta.

In view of the above, the MCA sought household perceptions on the quality and value-for-money of the universal postal services offered by MaltaPost. Other aspects that were addressed include speed of delivery, acceptability of a 5-day delivery week, perceptions of the experience of visiting the post office and complaint handling.

### **Speed of Delivery**

48% of respondents report two days to be an acceptable lead-time (D+2) for the delivery of letter mail. When asked to compare next day delivery (D+1) to deferred delivery (D+2) at a cheaper price, 43% of respondents would not consider deferral, whereas 29% responded that it depends on the urgency of the postal mail item.

### **Acceptability of a 5-day week**

58% of respondents would find a 5-day week for the delivery of postal articles as acceptable, instead of the current 6-day week. 21% would find a 5-day week to be a minor inconvenience whilst 9% would find a 5-day week to be inconvenient but workable. Only 12% would consider it to be a major inconvenience.

### **Visiting the Post Office**

62% of respondents claim to have visited a post office in the preceding 12 months, down from 73% in 2018. Of these, 80% visit a MaltaPost branch, whereas 15% go to a sub-post office.

Respondents identified collecting parcels (47%) and paying bills (37%) as the main reasons for visiting the post office, with the majority heading to a MaltaPost branch rather than a sub-post office.

### **Complaint Handling**

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41% of respondents who contacted MaltaPost did so to check their parcel status, whereas 34% contacted MaltaPost to make a postal service complaint. These complainants make up 6% of all the households surveyed (7% in 2018).

Of those respondents who claim to have filed a complaint, 53% were not satisfied with MaltaPost's handling of their complaint (54% in 2018) whilst only 34% claim to have been satisfied (21% in 2018).

For a more comprehensive picture of the survey, a presentation of the main findings is available in [presentation format on the MCA website](#).

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### **Background to the survey function at the MCA**

As regulator for postal services, the Malta Communications Authority (MCA) carries out market research on a regular basis. The aim of this market research is to guide the Authority's decisions, the effects of which are felt by consumers and businesses alike, by providing an additional source of information for such decisions.

This survey forms part of a series of surveys examining households, businesses and bulk mailers use of postal services and is intended to assess the extent of satisfaction amongst households with the services provided by MaltaPost, as well as to monitor a number of aspects related to the sustainability of postal services (such as price levels, quality and access).

### **Methodology and Fieldwork**

The MCA Postal Perceptions Survey addressed to households was carried out by EMCS Ltd. on behalf of the MCA via the use of Telephone Computer-assisted interviewing (CATI). Each questionnaire lasted around 20 minutes.

500 respondents over the age of 18 were chosen randomly to create a representative sample, with each respondent identified as being the person mainly responsible for the mail in their household. Respondents' identities are anonymous, and all relevant information will be presented in aggregate.

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