MCA Postal Perceptions Survey - Households

Main survey findings based on perceptions

21 January 2022

Purpose and Methodology

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 August & October 2021 on behalf of the MCA

Fieldwork

- Interviews were carried out by telephone lasting around 15-20 minutes.
- The survey respondents were chosen randomly.
- Only one person per household was interviewed. 99 of the respondents were in the 18-29 age group, 182 were 30-49 years old, 106 were 50-64, 113 were above 65, for a total sample 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.

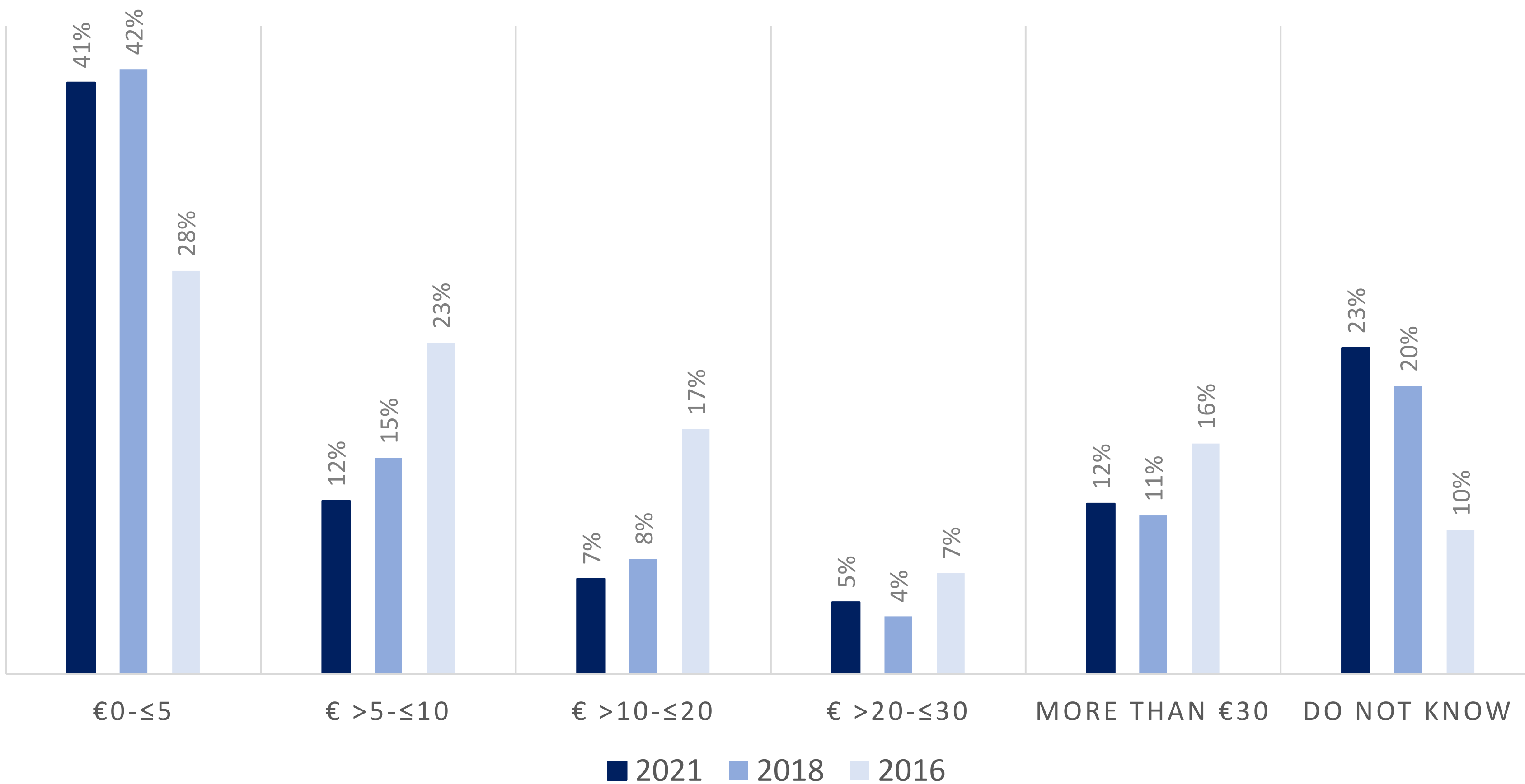
Responses

- 500 net respondents
- Margin of error +/- 4.38% at 95% confidence interval.

Expenditure on postal activity

Money spent – on average - for posting letters / parcels / packets

Number of respondents: 500 (2021), 500 (2018)



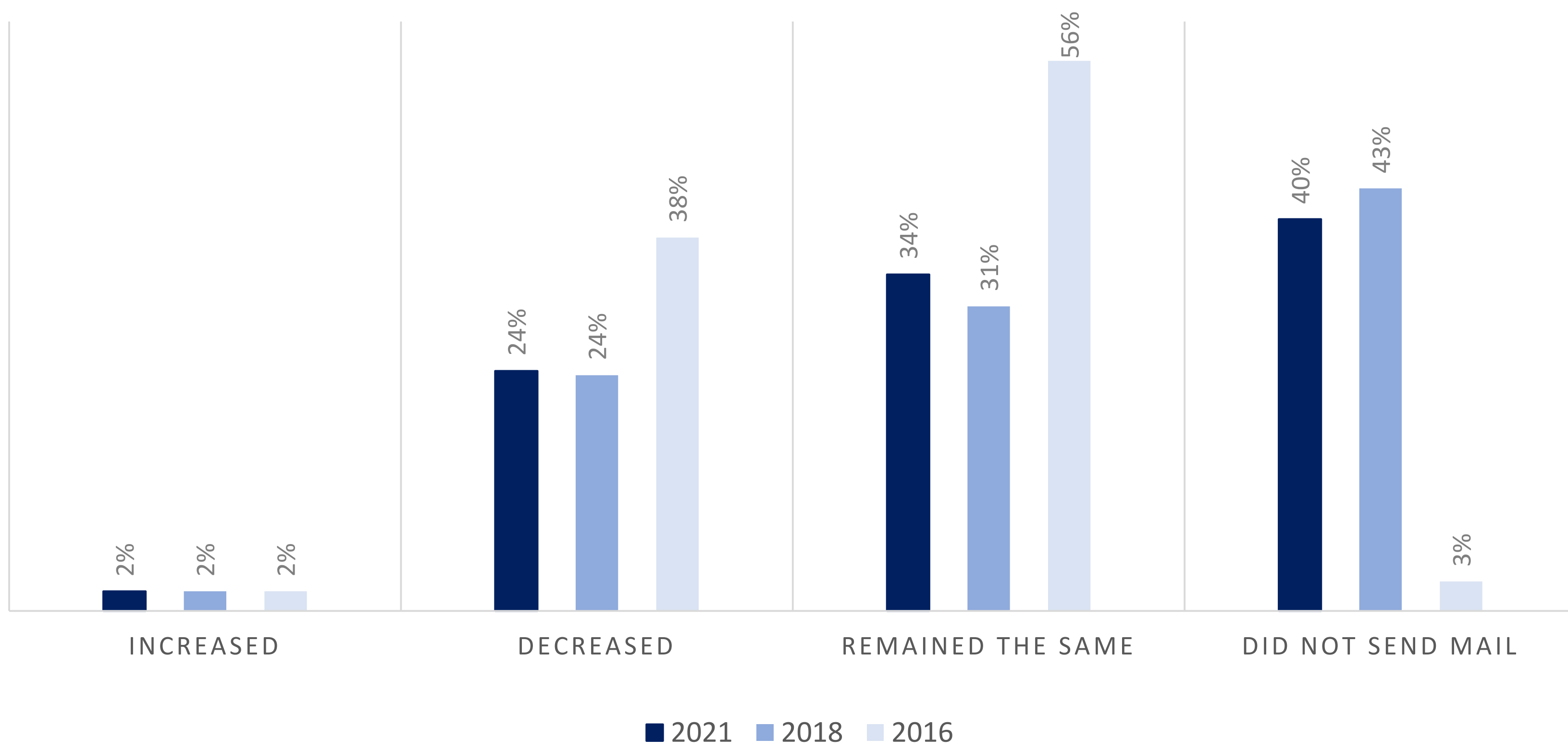
Letter Mail

Letter mail volumes (1 of 3)

Letters sent

Number of respondents: 500 (2021), 500 (2018)

40% of households have not sent any letter mail over the past 12 months (43% in 2018).



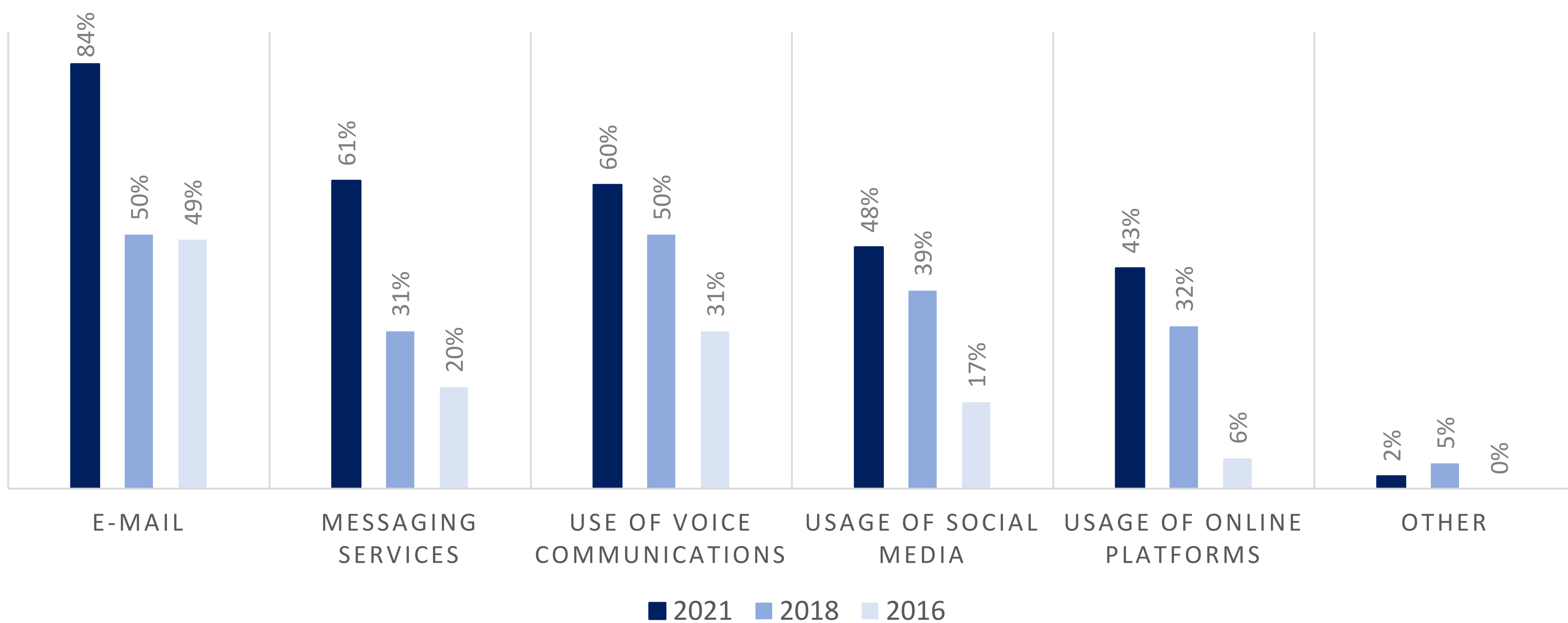
Letter mail volumes (2 of 3)

Reasons for decrease in letters sent

Number of respondents: 122 (2021), 119 (2018)

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

E-mail is the main alternative to sending letters utilised by respondents (84%), followed by messaging services and use of voice communications.

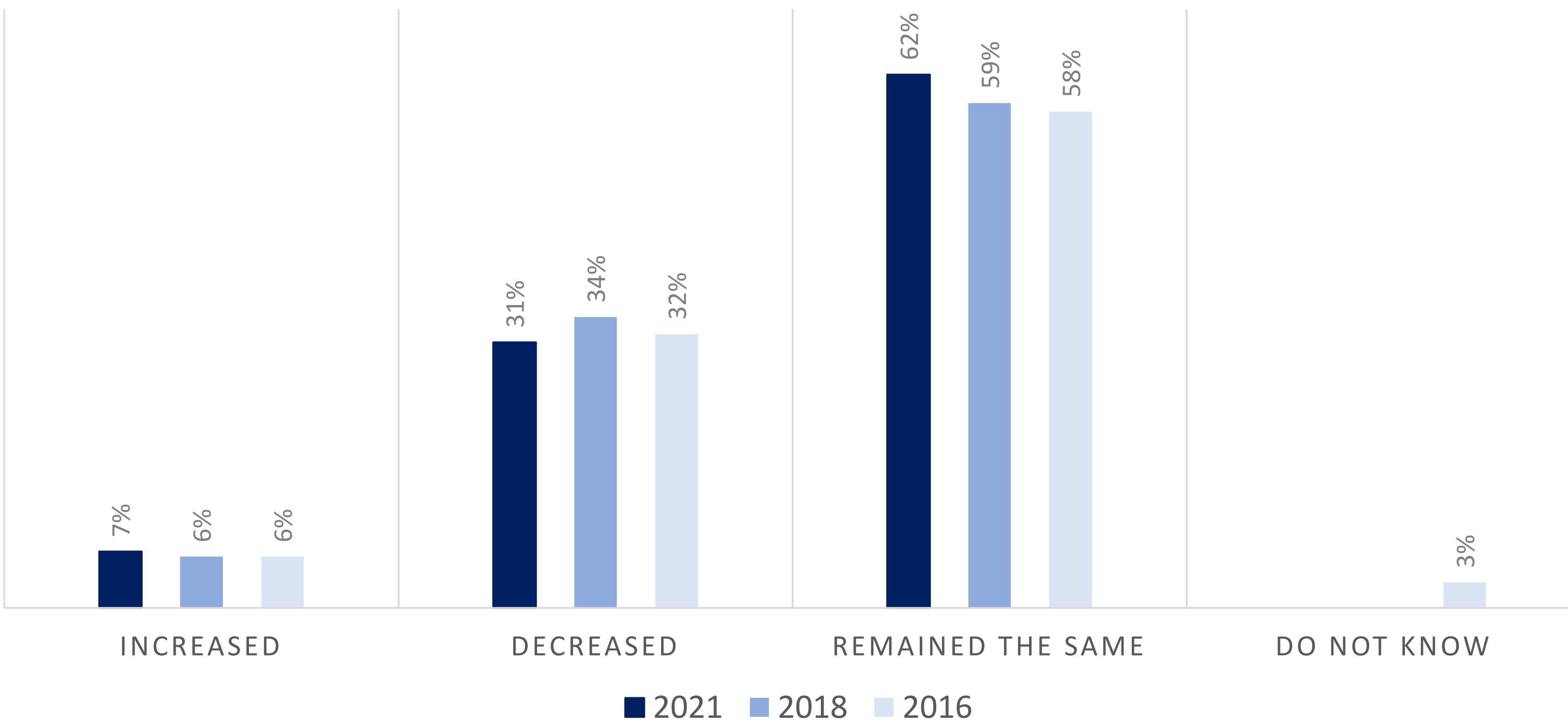


Letter mail volumes (3 of 3)

Letters received

Number of respondents: 500 (2021), 500 (2018)

62% of respondents say the number of letters received per week remained the same over the previous 12-month period.

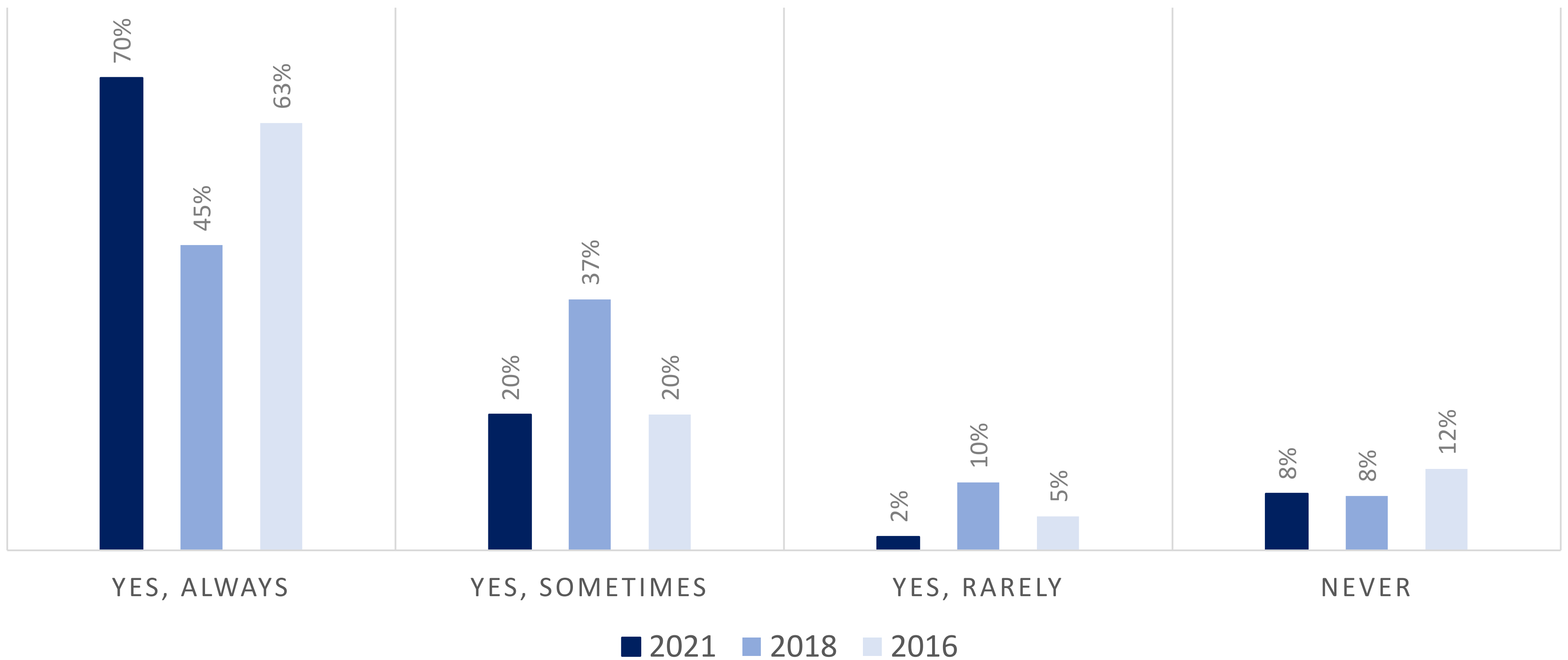


Postcode usage (1 of 2)

Letters sent and addressed with postcode

Number of respondents: 300 (2021), 267 (2018)
(Question was answered by those who previously indicated that they had sent a letter)

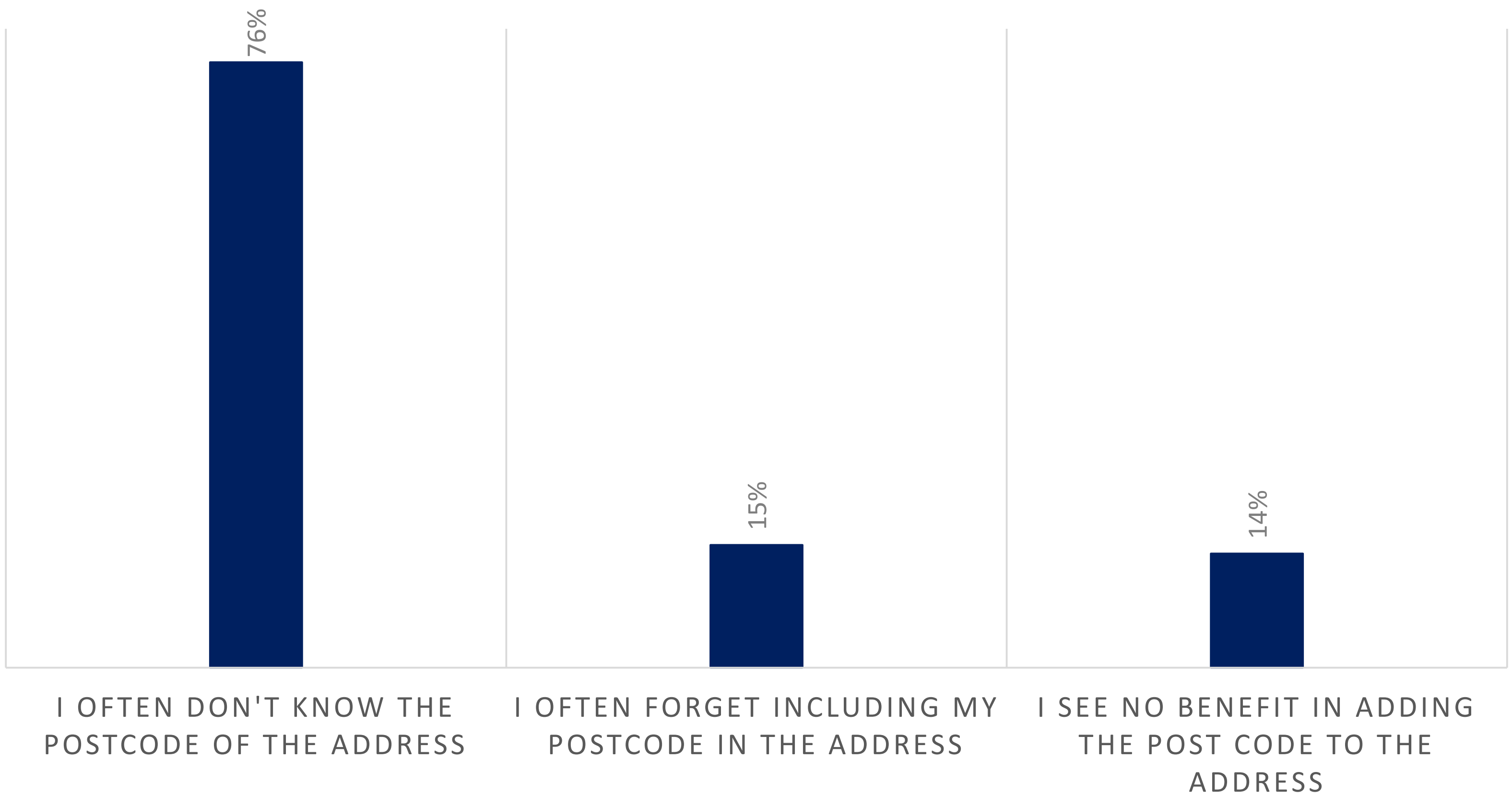
There was a significant increase in the percentage of respondents who always write the post-code, from 45% in the year 2018 to 70% this time round. The percentage of individuals that never write the post code remained the same (8%).



Reasons for not addressing letter mail with post-code

Number of Respondents: 91

(Question was answered by those who previously indicated that they do not always / never write the post-code. Respondents could give multiple responses).

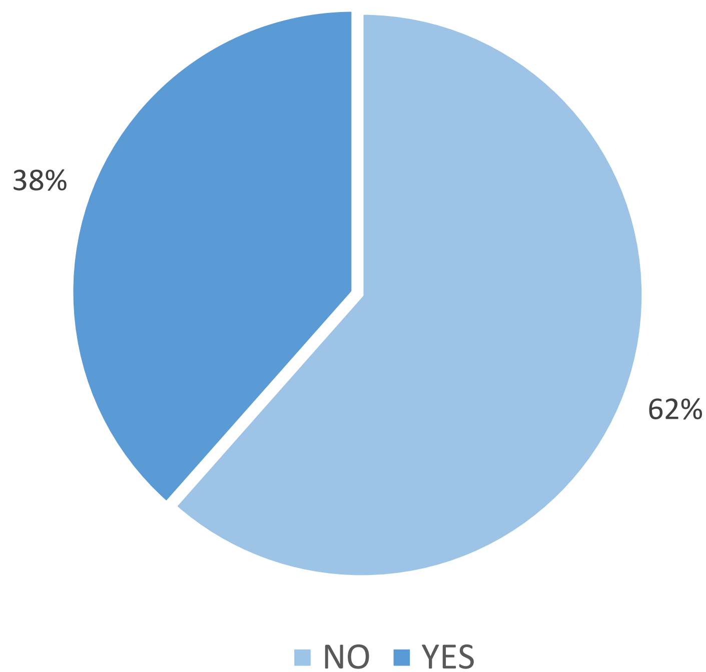


Substitution to non-postal alternatives

Likelihood of switching in case of a price increase for letter mail

Number of respondents: 500

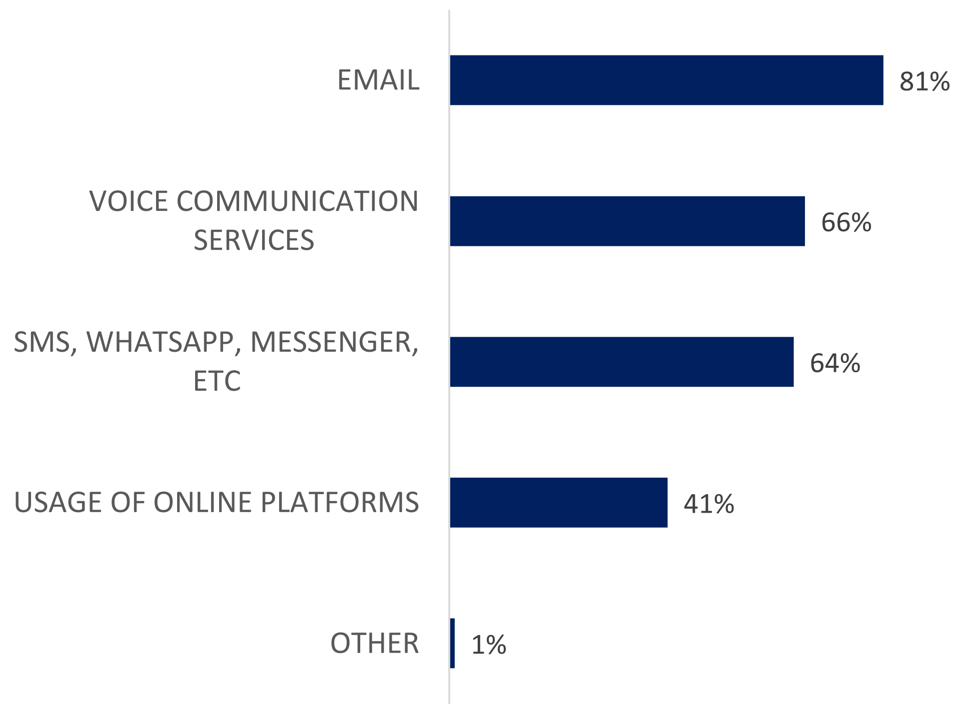
62% of respondents indicated that they would not switch to a non-postal alternative if the price of a 50g letter had to rise from 30c to 33c (67% in 2018).



Non-postal alternatives to letter mail

Number of respondents: 192 (2021), 119 (2018)

(Question was asked to those who answered 'yes' in their likelihood of switching following a price increase. Respondents could give multiple responses.)

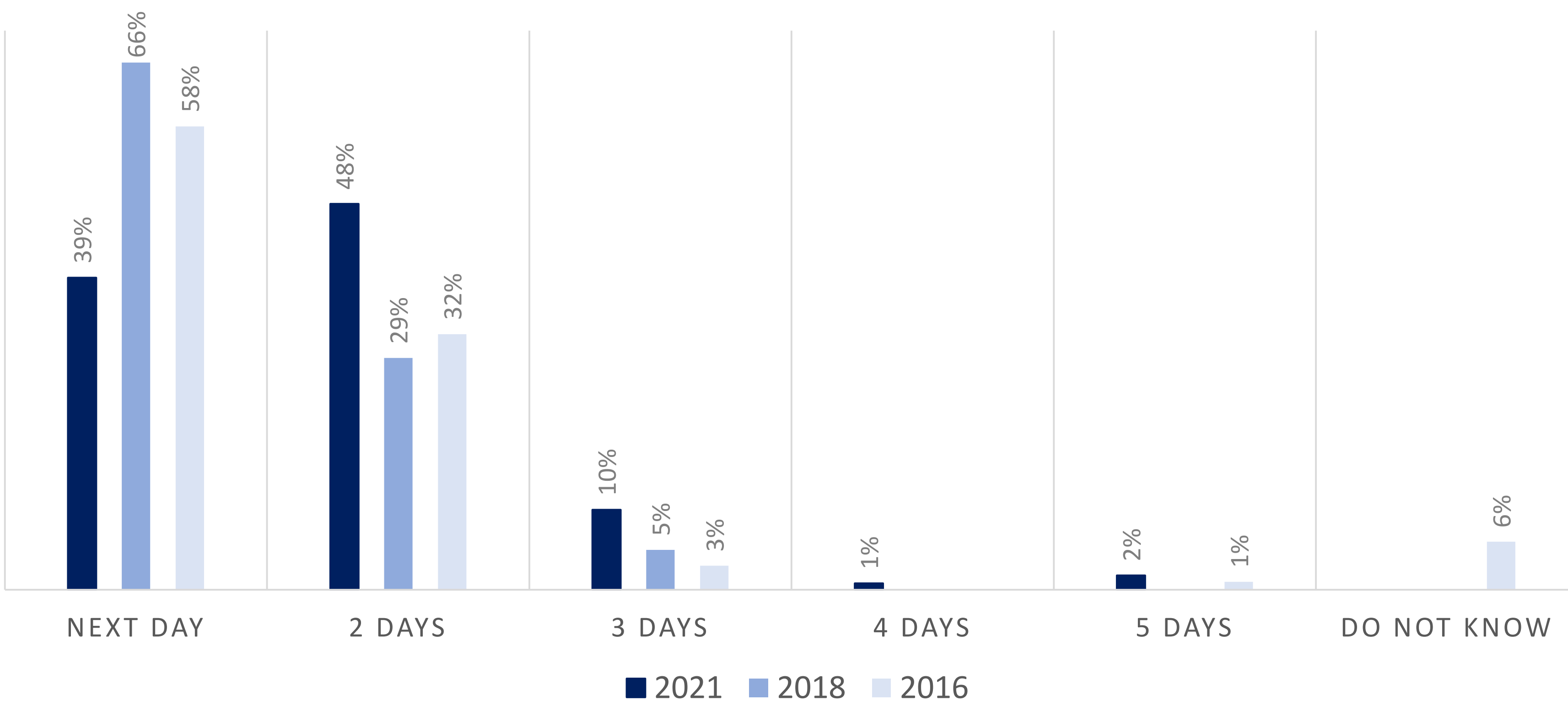


Lead time and deferred delivery

Acceptable lead time from posting to actual delivery of letter mail

Number of respondents: 500 (2021), 482 (2018)

48% respondents believe that 2 days is an acceptable lead-time from date of posting a letter to actual delivery, followed by 'next day' at 39%. In 2018, 66% of respondents indicated delivery on 'next day' as an acceptable lead time.

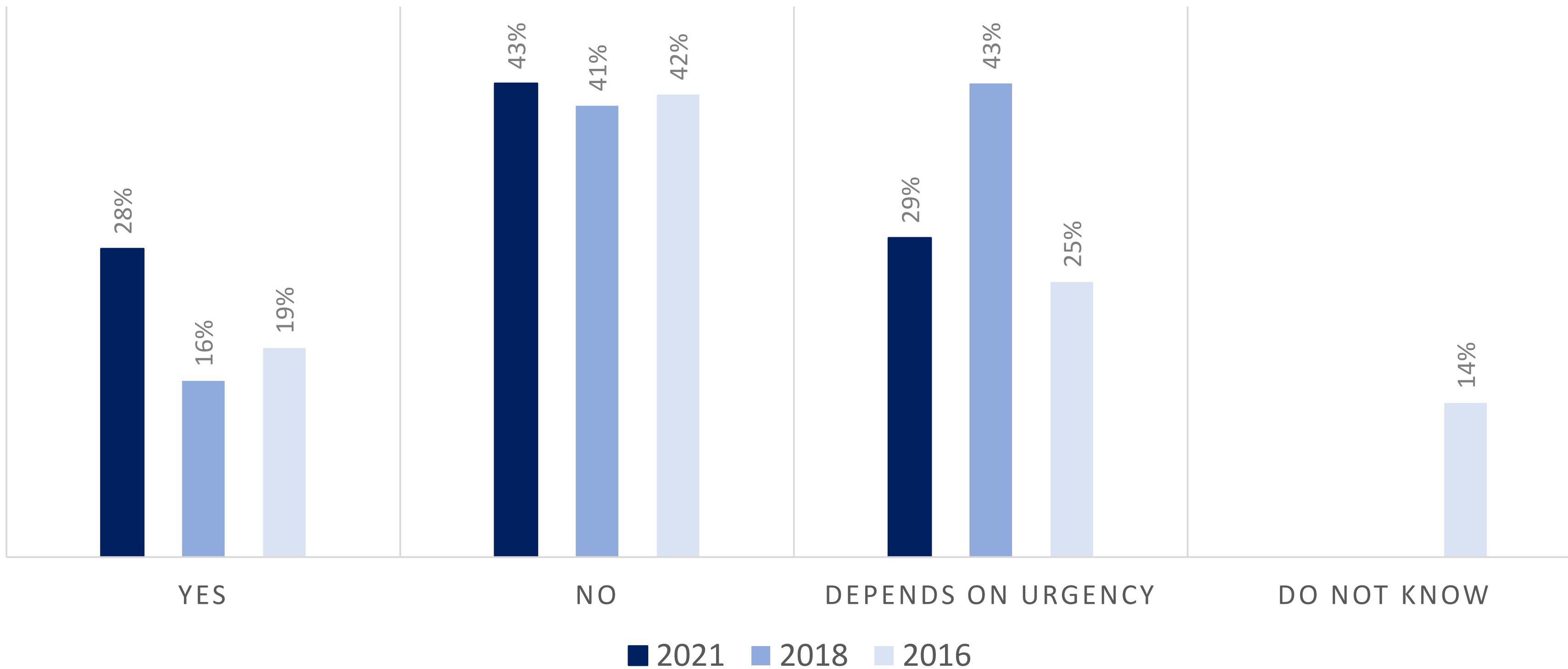


Lead time and deferred delivery

Acceptability of a deferred delivery of 2 days at a discounted tariff rate

Number of respondents: 500 (2021), 500 (2018)

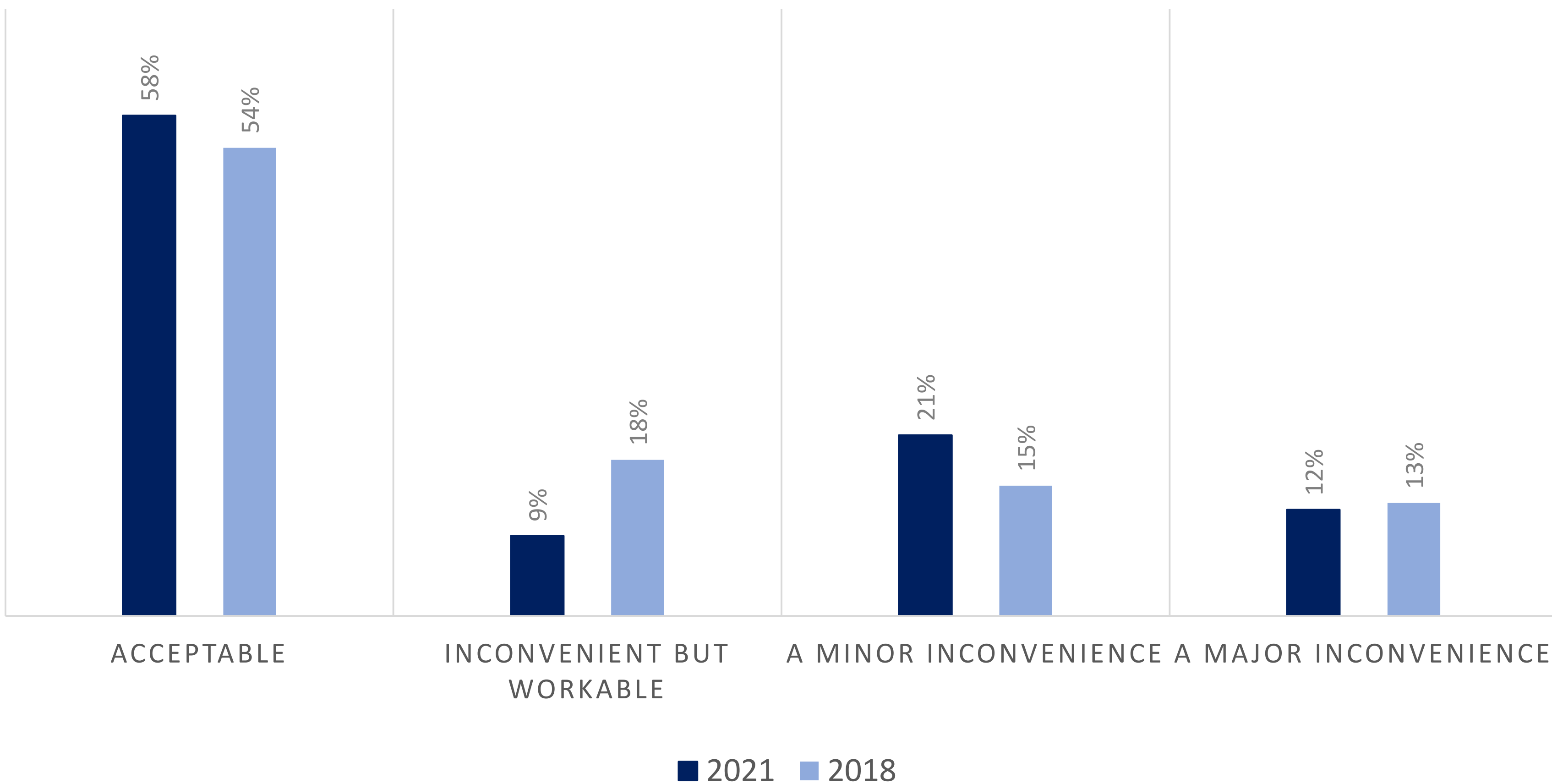
Respondents were asked if they would opt into a service that delivered within 2 days at a cheaper price, as opposed to next day delivery.



Acceptability of a 5-day delivery week

To what extent is a 5-day postal delivery week acceptable, instead of a 6-day week?

Number of respondents: 500 (2021), 500 (2018)



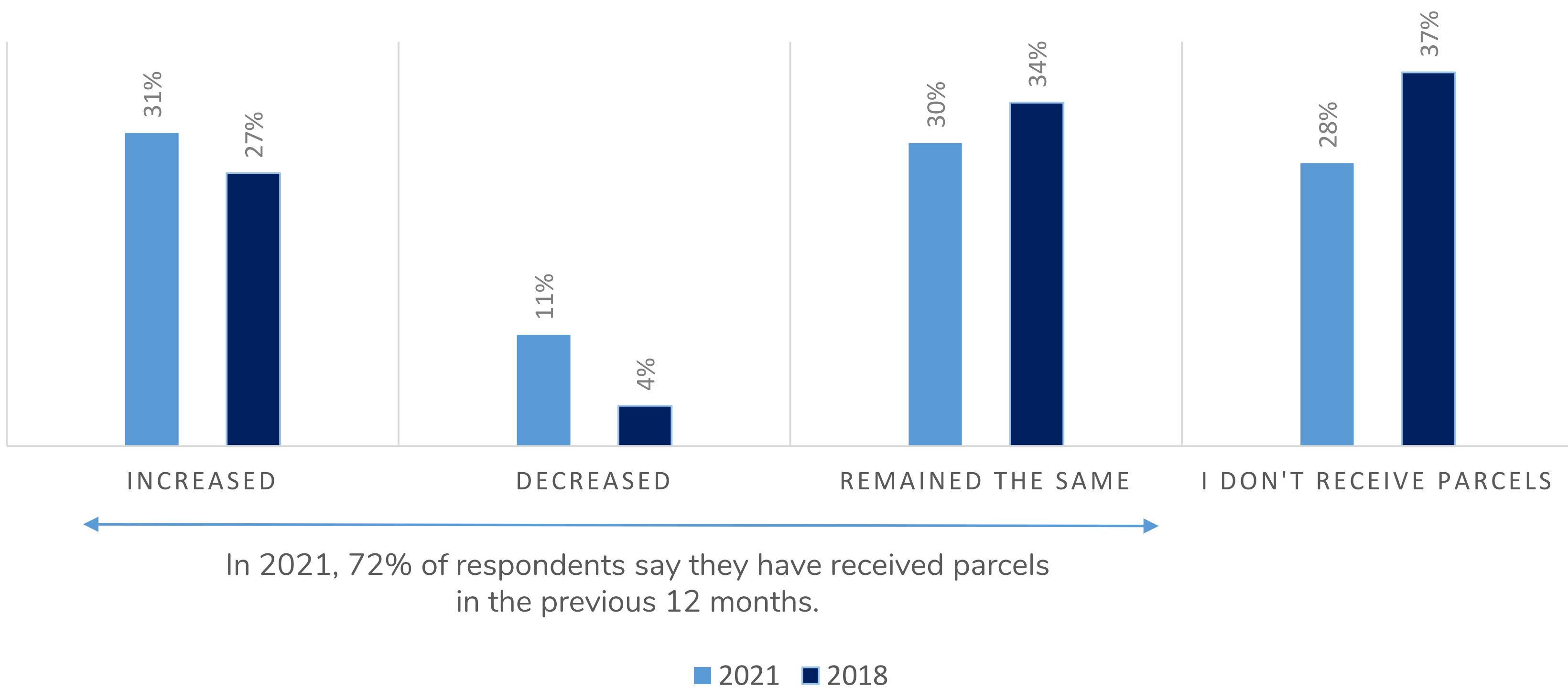
Parcel Mail

Parcel mail activity (1 of 18)

Changes in parcels mail volumes in the previous 12 months

Number of respondents: 500 (2021), 500 (2018)

31% of respondents indicated an increase in the number of parcels (those arriving from abroad) received in the past twelve months.

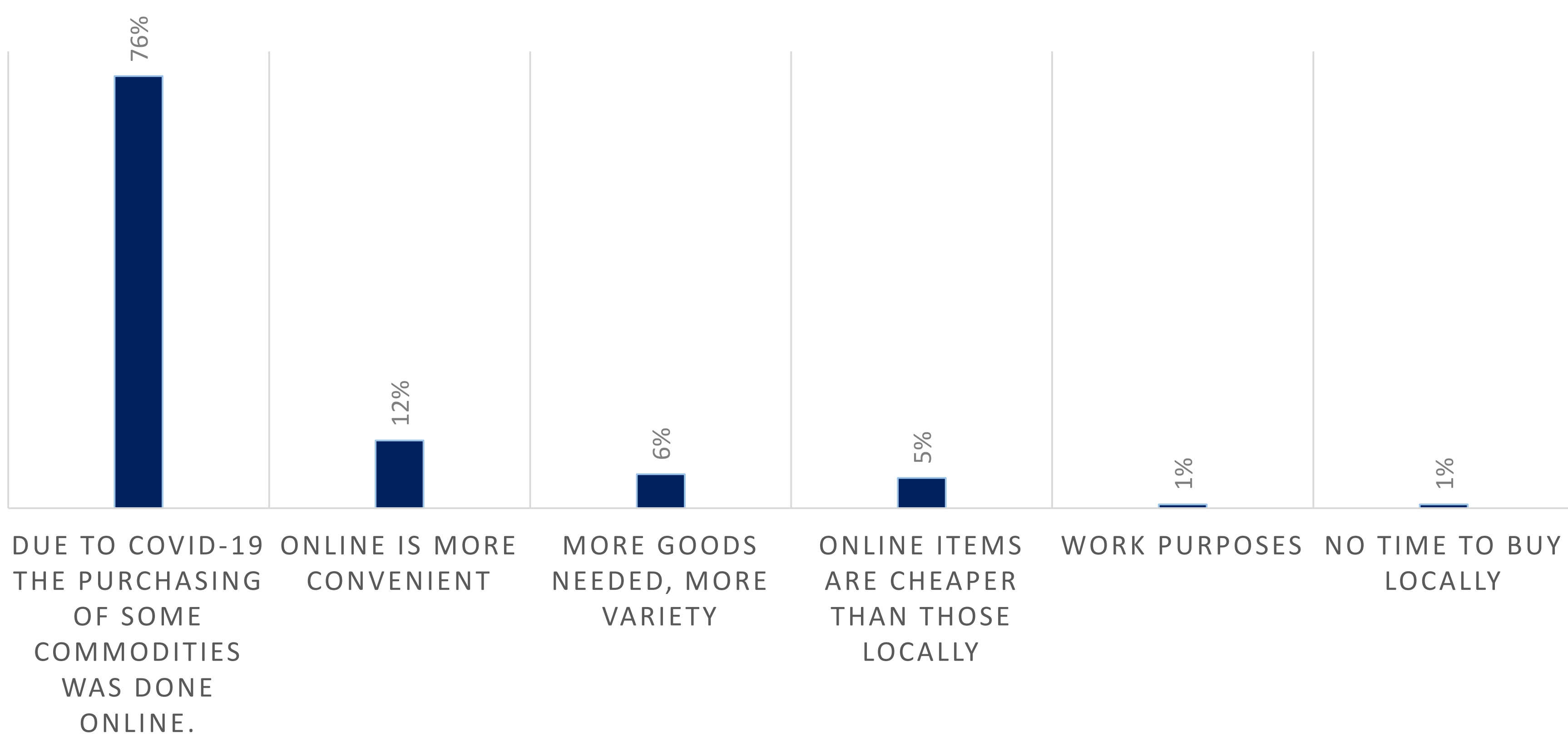


Parcel mail activity (2 of 18)

Reasons for reporting an increase in the parcels received

Number of respondents: 153

(Question was asked to those who answered they recorded an increase in parcels received in the previous 12 months.)



Reasons for reporting a decrease in the parcels received

Number of respondents: 56

(Question was asked to those who answered they recorded an decrease in parcels received in the previous 12 months.)

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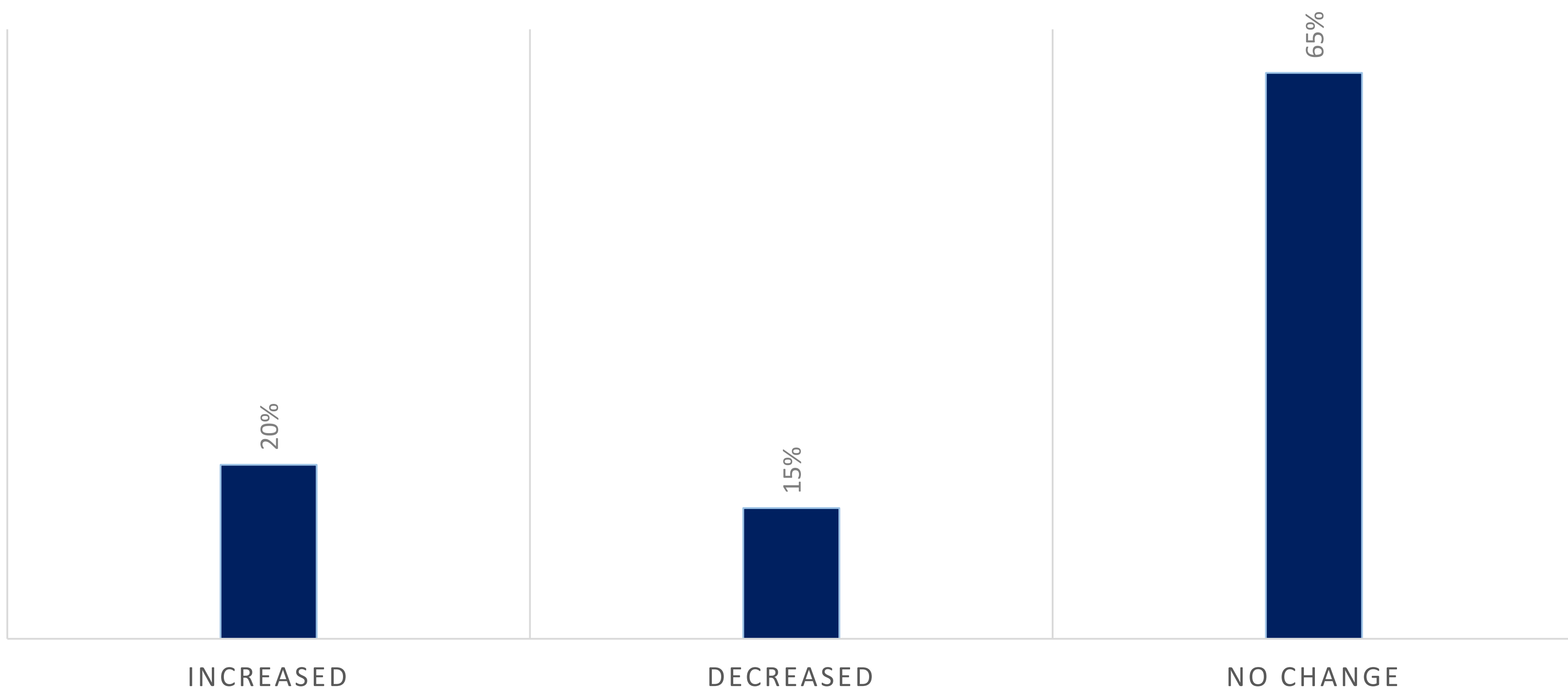
Domestic Parcels / Packets received

Number of respondents: 361 respondents said they received domestic parcels. The figures below are calculated on the basis of this figure.

20% of respondents indicated an increase in the number of domestic parcels / packets received by their household in the last 12 months, whilst 65% indicated that there was no change.

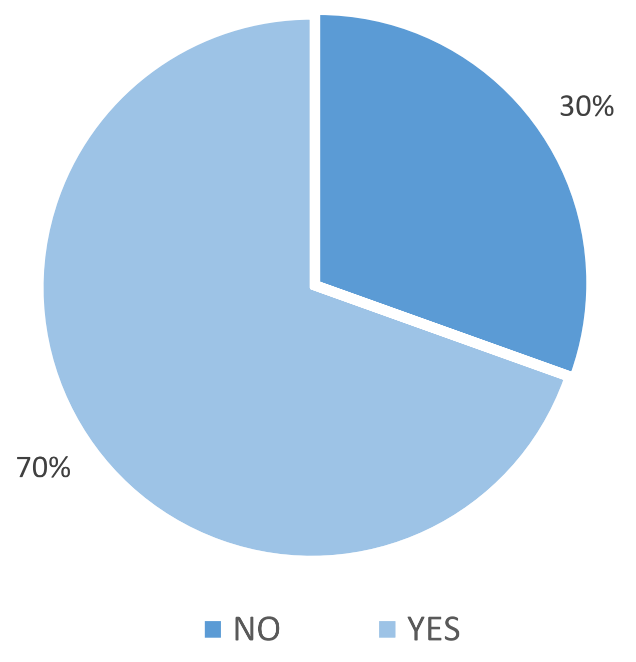


Delivery of goods from orders placed on local websites

Number of respondents: 361

(Question was asked to those who answered yes to domestic parcels.)

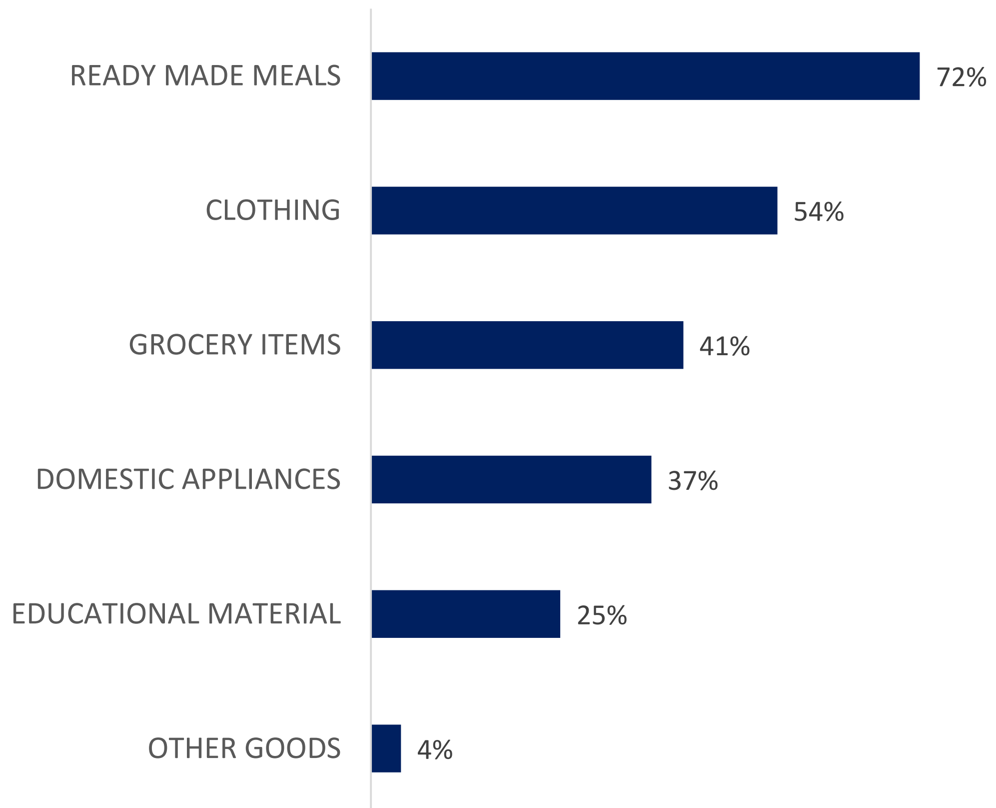
70% of respondents say they had delivery of goods from orders placed on local websites in the past 12 months.



Type of goods delivered

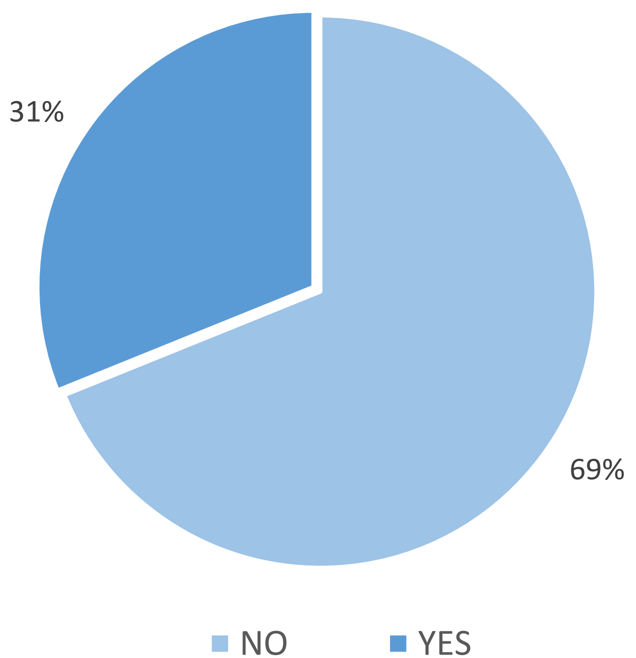
Number of respondents: 251

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



Was it difficult to receive an addressed parcel/ packet during the last year compared to pre-Covid 19?

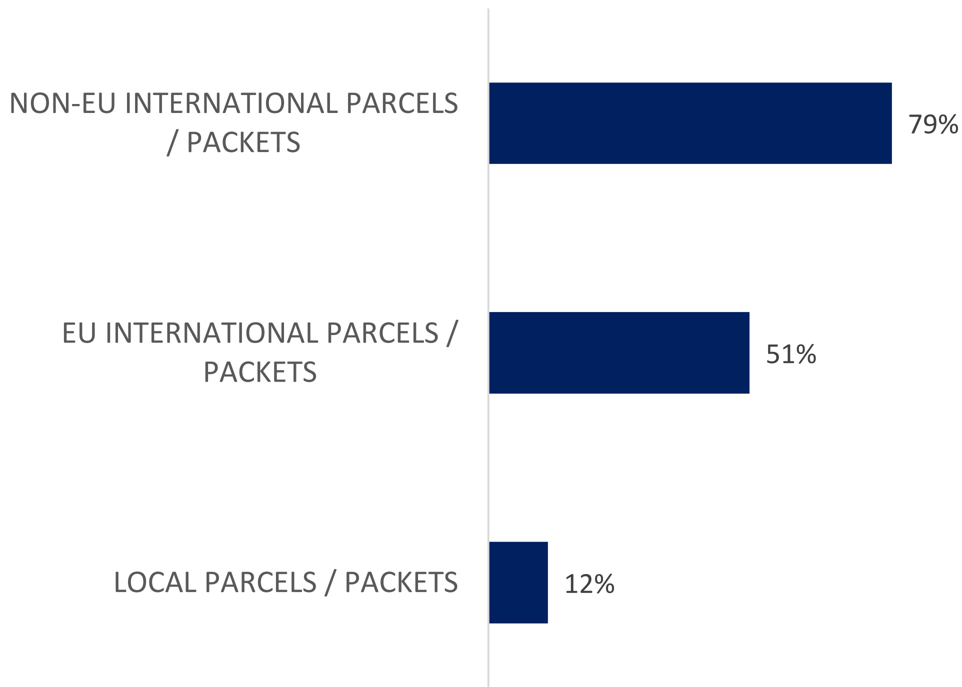
Number of respondents: 361



Indication of the type of parcel/ packet which gave the respondents a difficulty

Number of Respondents: 112

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



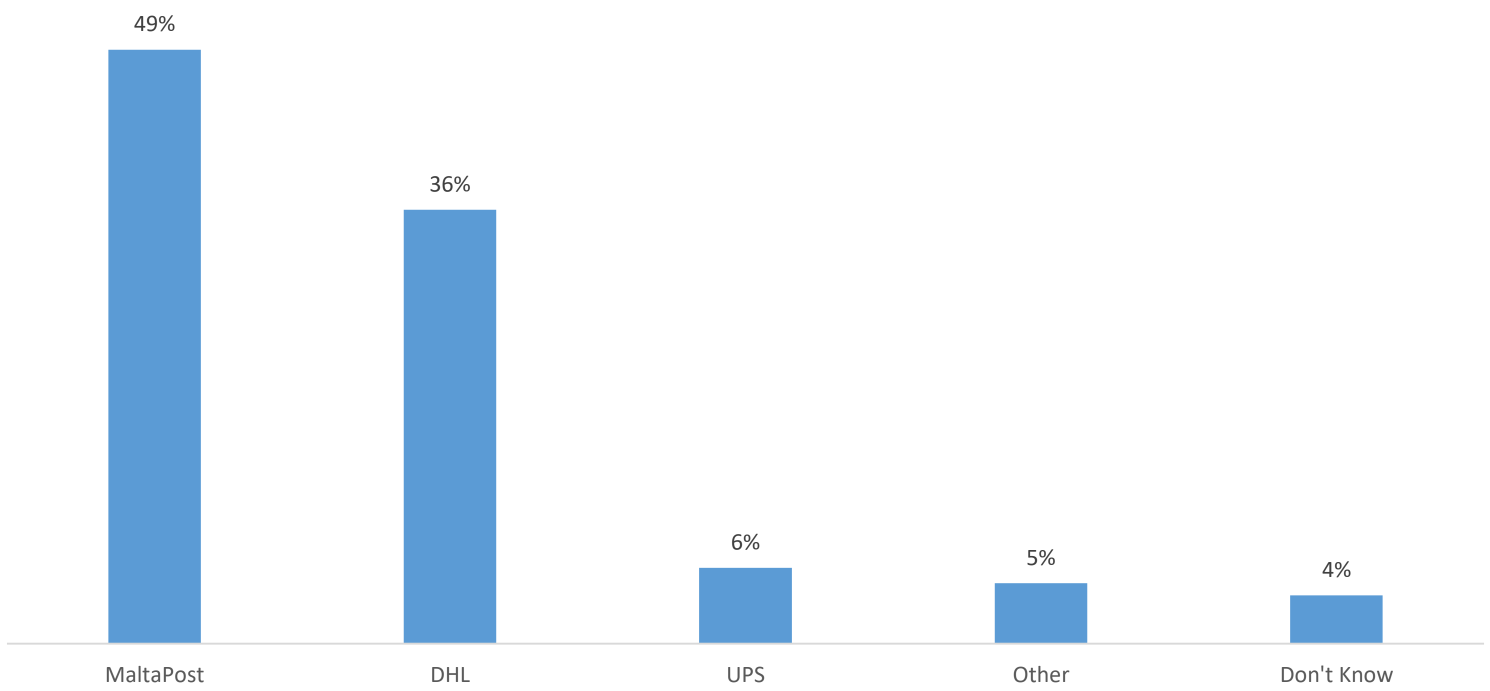
Parcel mail activity (7 of 18)

Parcel delivery by operator

Number of respondents: 361

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

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: 361 (2021)

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

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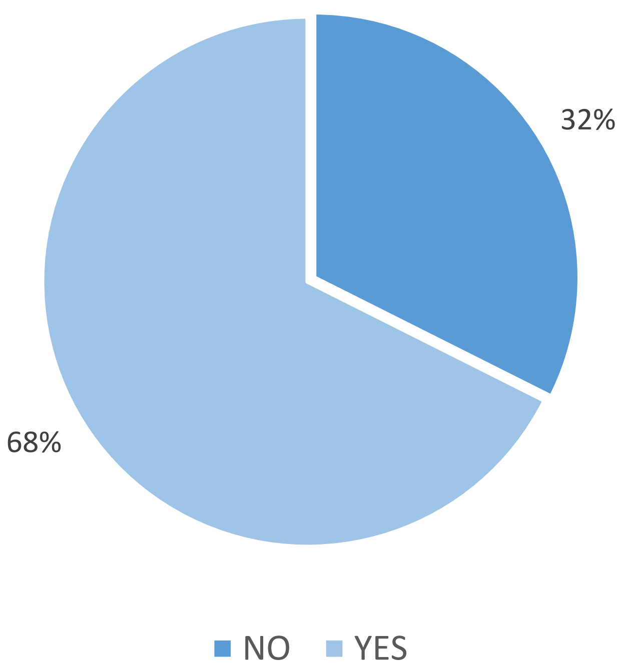
Parcel mail activity (9 of 18)

Awareness of parcel lockers

Number of respondents: 361

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

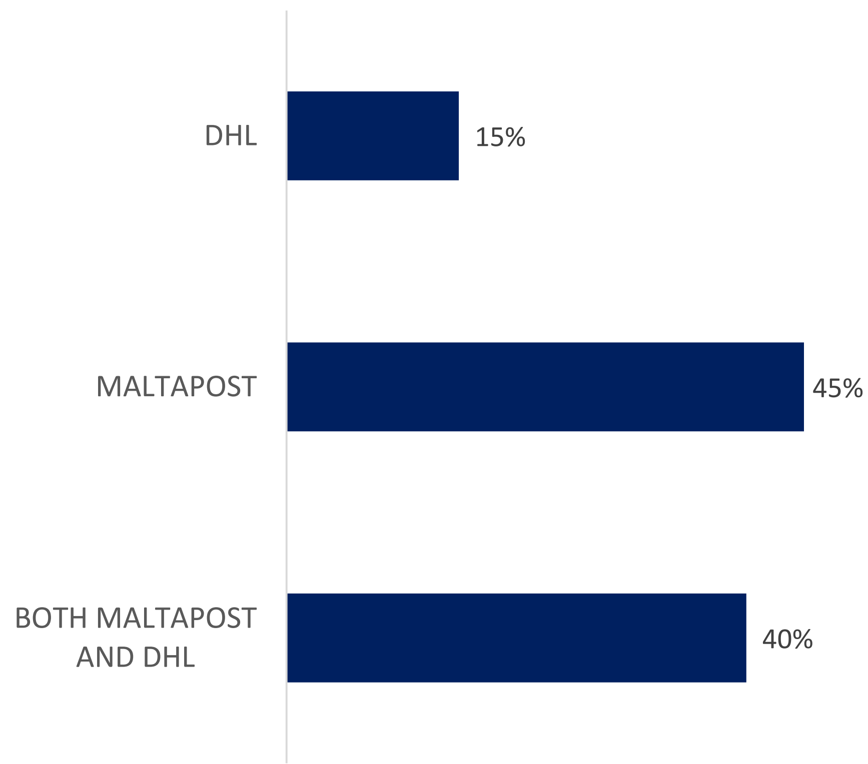
68% of respondents are aware of the availability of parcel lockers (57% in 2018). Of these, 45% are aware of the Maltapost parcel locker only, whilst 40% are aware of both Maltapost and DHL parcel lockers.



Awareness of parcel lockers by operator

Number of respondents: 244

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

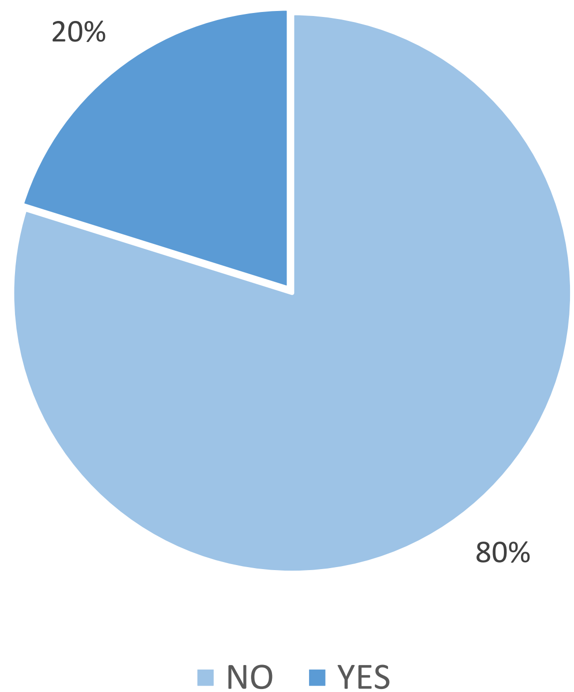


Parcel locker use

Number of respondents: 244 (2021)

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

20% of the respondents who are aware of the availability of parcel lockers have used one in the last 12 months. (19% in 2018).

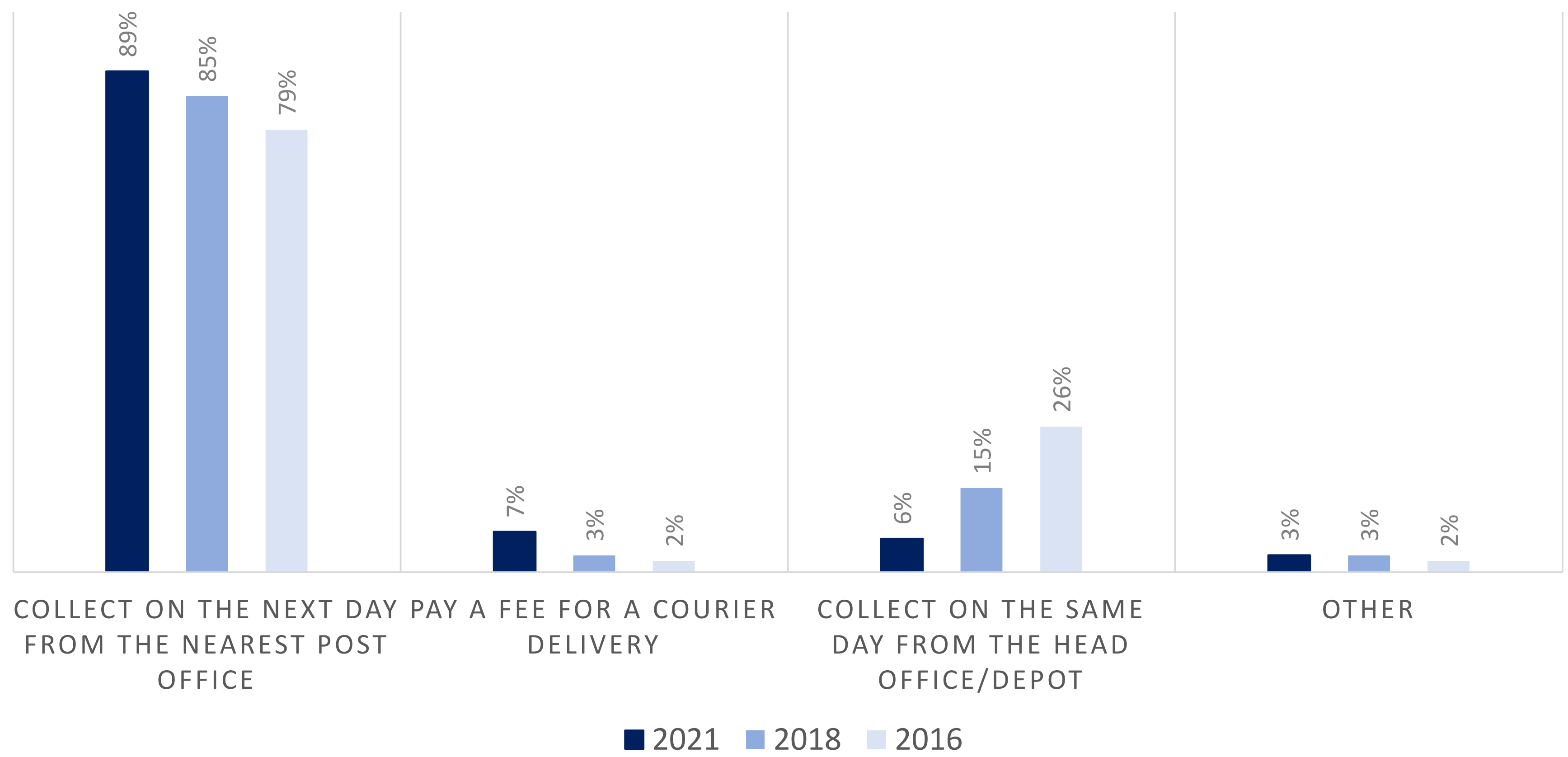


Parcel mail activity (11 of 18)

Preferred way to collect a parcel if home delivery is missed

Number of respondents: 361 (2021), 317 (2018)

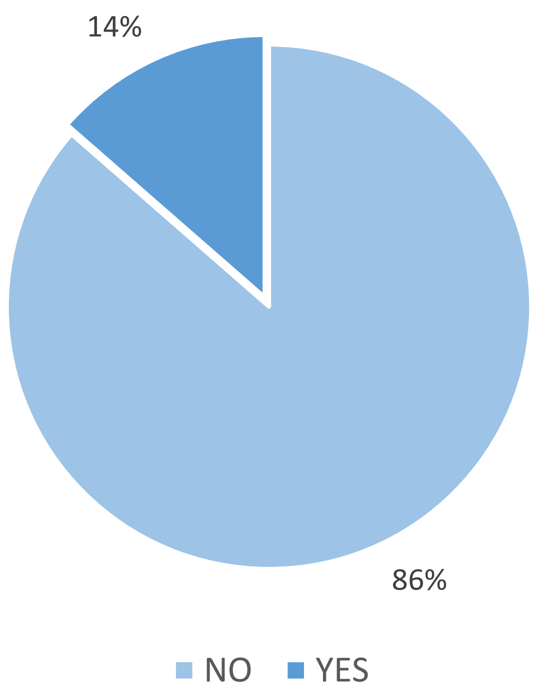
(Question was answered by those who previously indicated that they had received a parcel. Respondents were allowed multiple answers).



Use of packet/parcel forwarding services

Number of respondents: 361 (2021), 317 (2018)

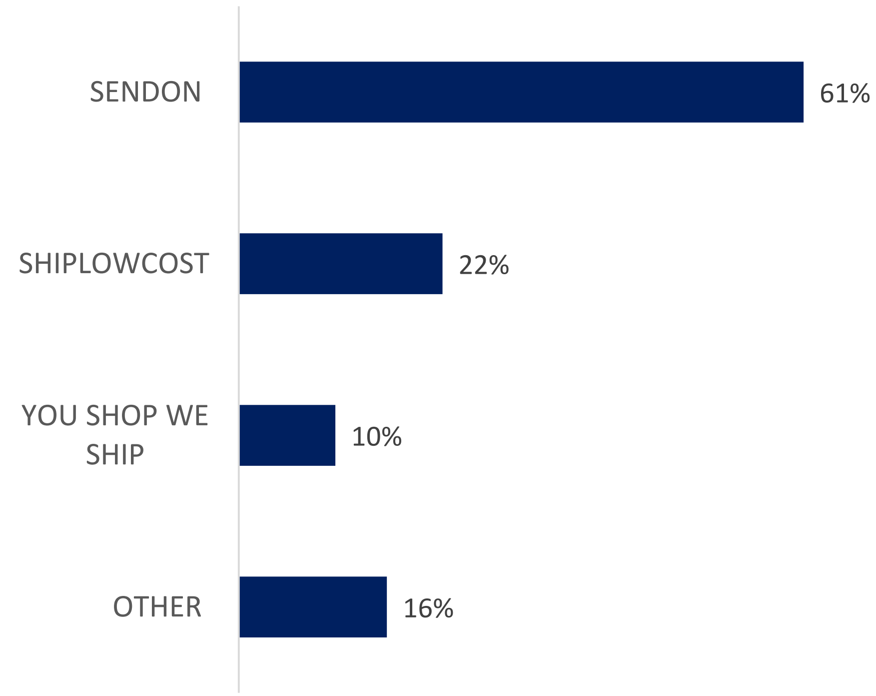
(Question was answered by those who previously indicated that they had received a parcel)



Forwarding service operator used in the last 12 months

Number of respondents: 49

(Question was asked to respondents indicating they used a packet/parcel forwarding service. Respondents were allowed multiple answers).

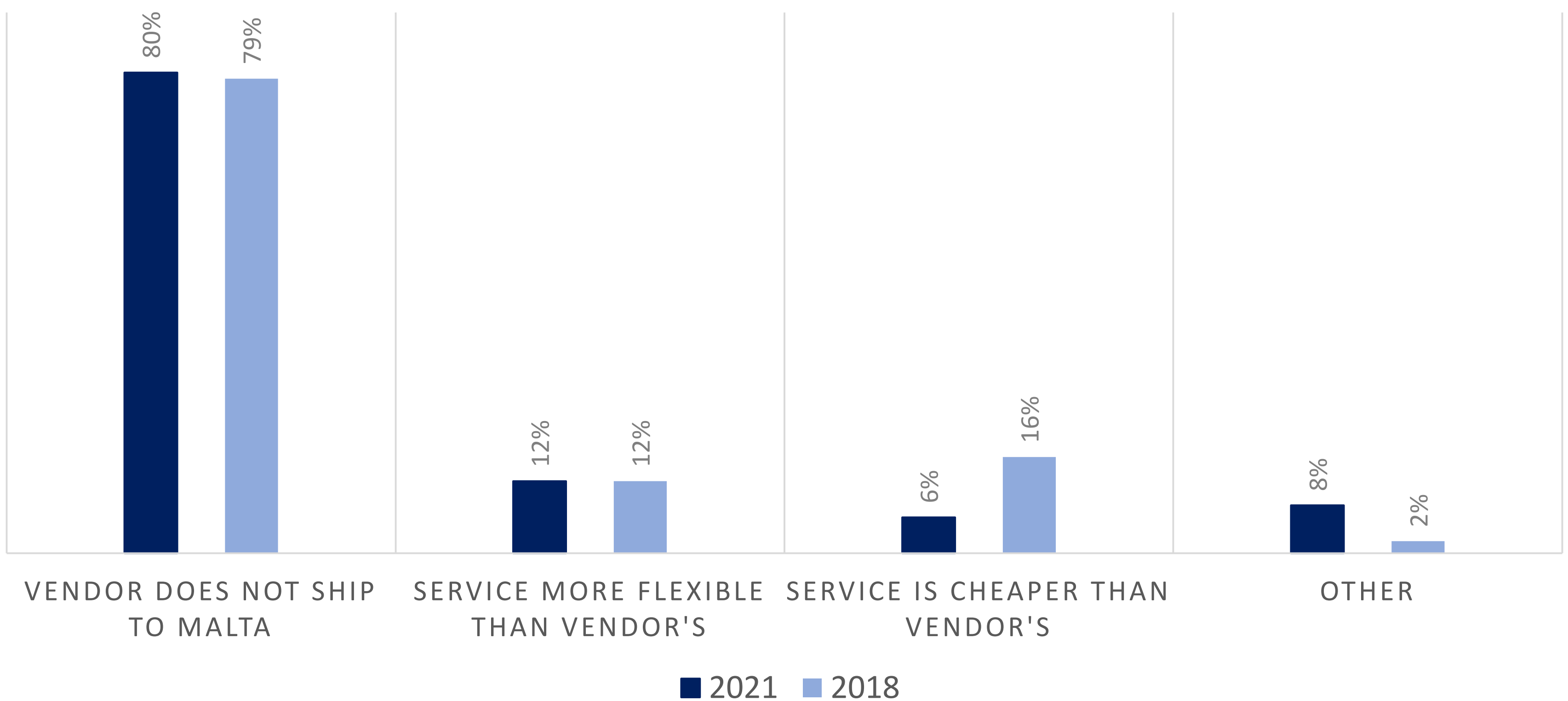


Reasons for using a packet/parcel forwarding service

Number of respondents: 49 (2021), 58 (2018)

(Question was answered by those who previously indicated that they used a forwarding service. Respondents were allowed multiple answers).

80% used forwarding services because the vendor did not deliver goods to Malta, inline with 2018.

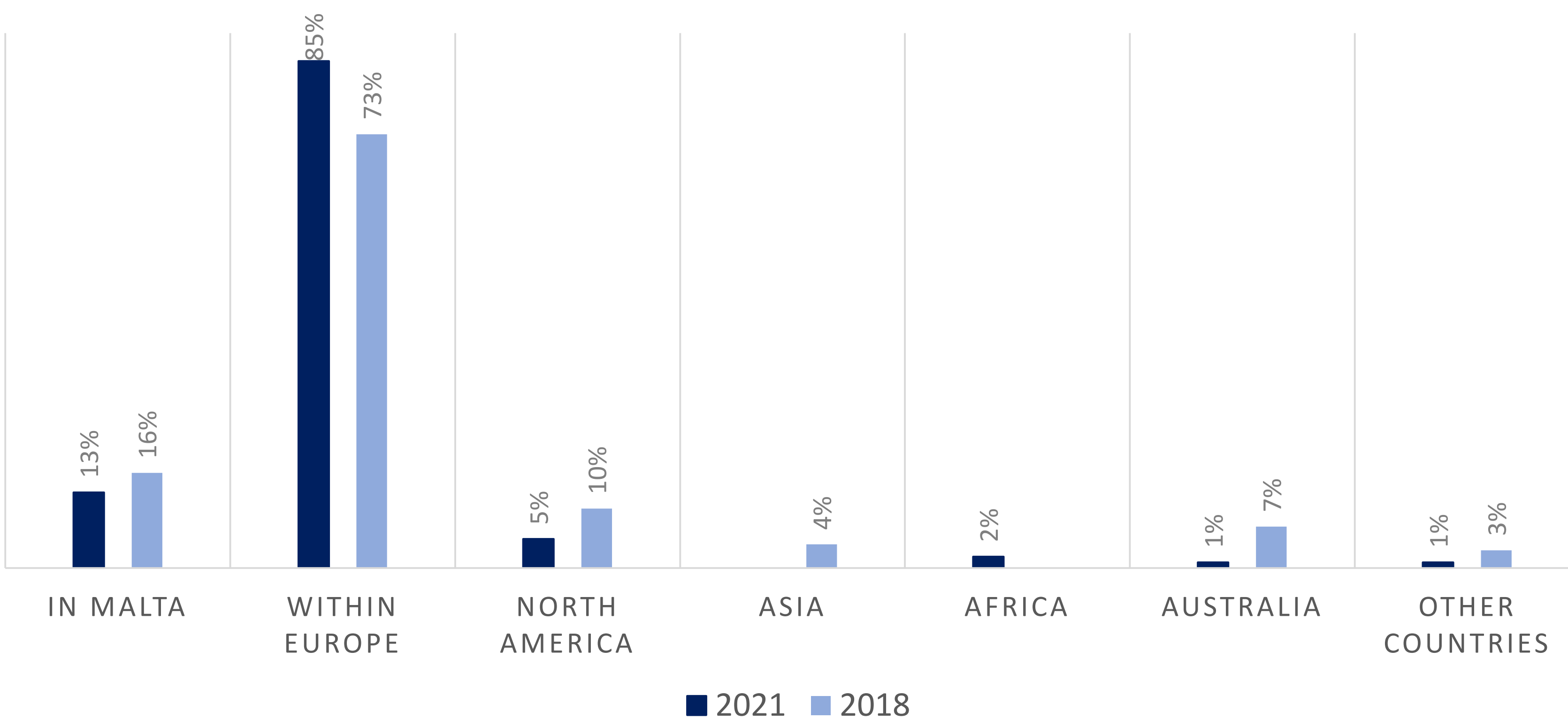


Destination of parcels sent using MaltaPost

Number of respondents: 103 (2021), 70 (2018)

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

Europe remains the most common destination for sending foreign parcels (85%), (73% in 2018 – an increase of 12%).

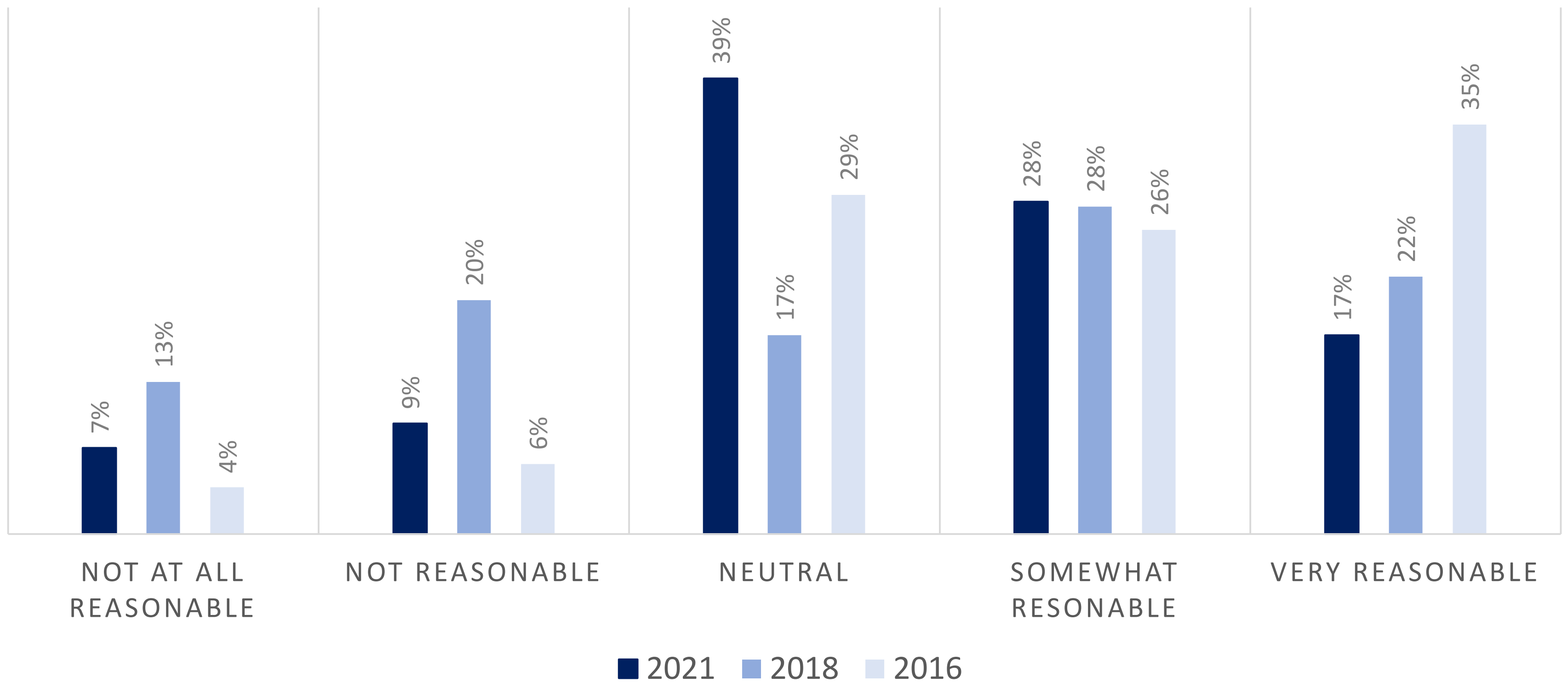


Perception of MaltaPost's prices for parcels sent overseas

Number of respondents: 96 (2021), 64 (2018), 77 (2016)

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

45% of respondents found these prices to be reasonable (50% in 2018). 39% of respondents are neutral on this (17% in 2018).

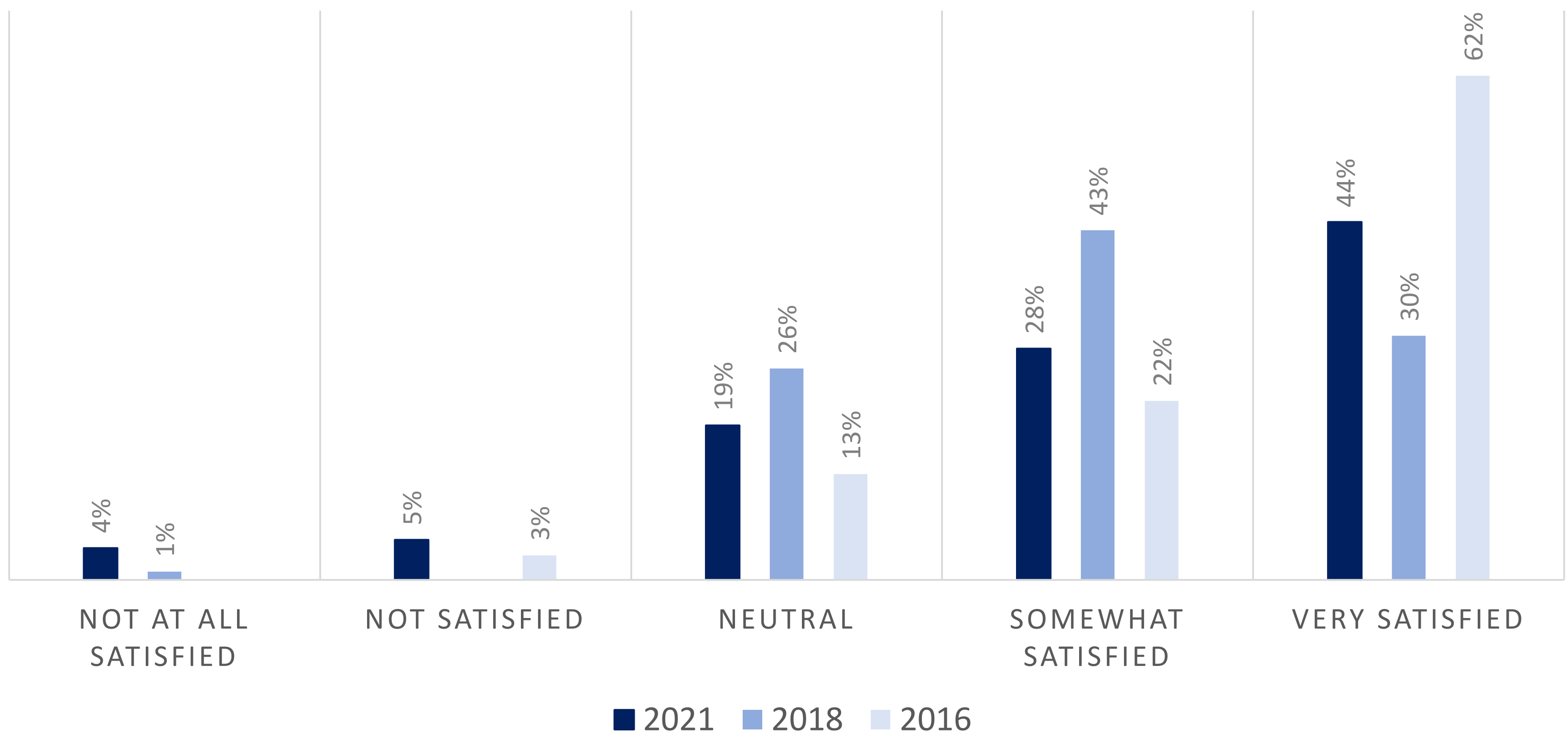


Parcel mail activity (16 of 18)

Satisfaction with sending/returning a parcel using MaltaPost

Number of Respondents: 103 (2021), 70 (2018), 77 (2016)

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

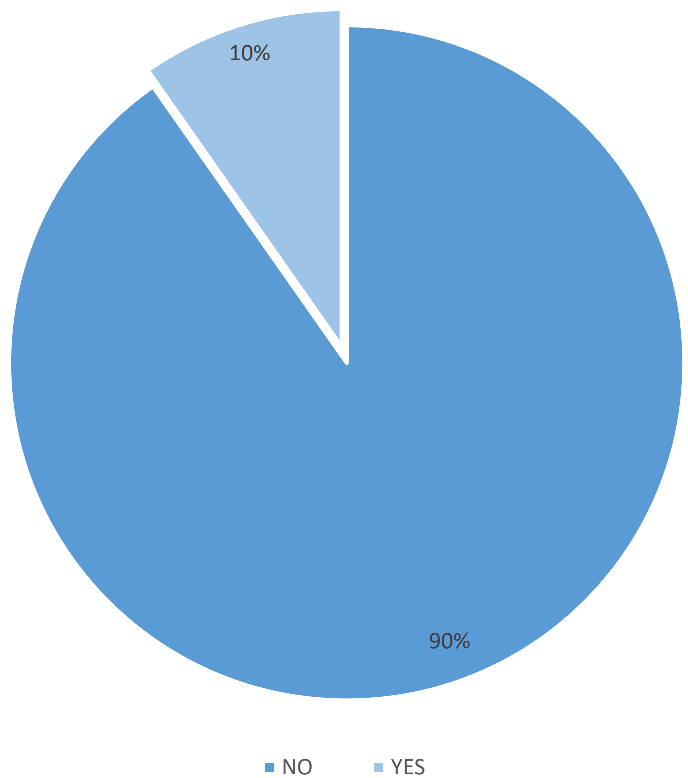


Usage of other operators' outbound parcel services instead of MaltaPost's

Number of respondents: 227 (2021)

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

Within the past 12 months, 10% of respondents used operators other than MaltaPost to send parcels. Of these, the vast majority used DHL to send a parcel. This figure is up from 3% in 2018.



Reasons for using other operators' outbound parcel services

Number of Respondents: 22 (2021), 16 (2018)

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

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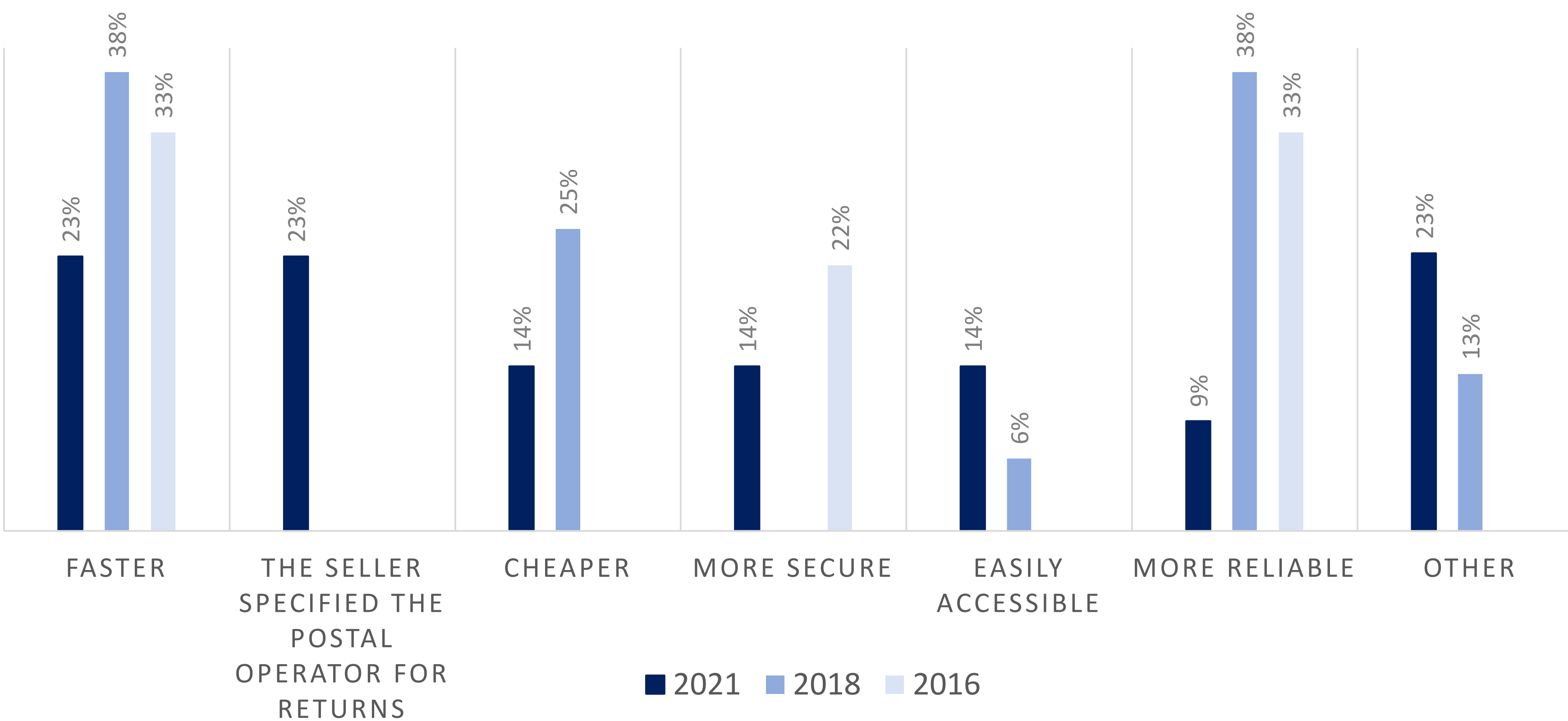


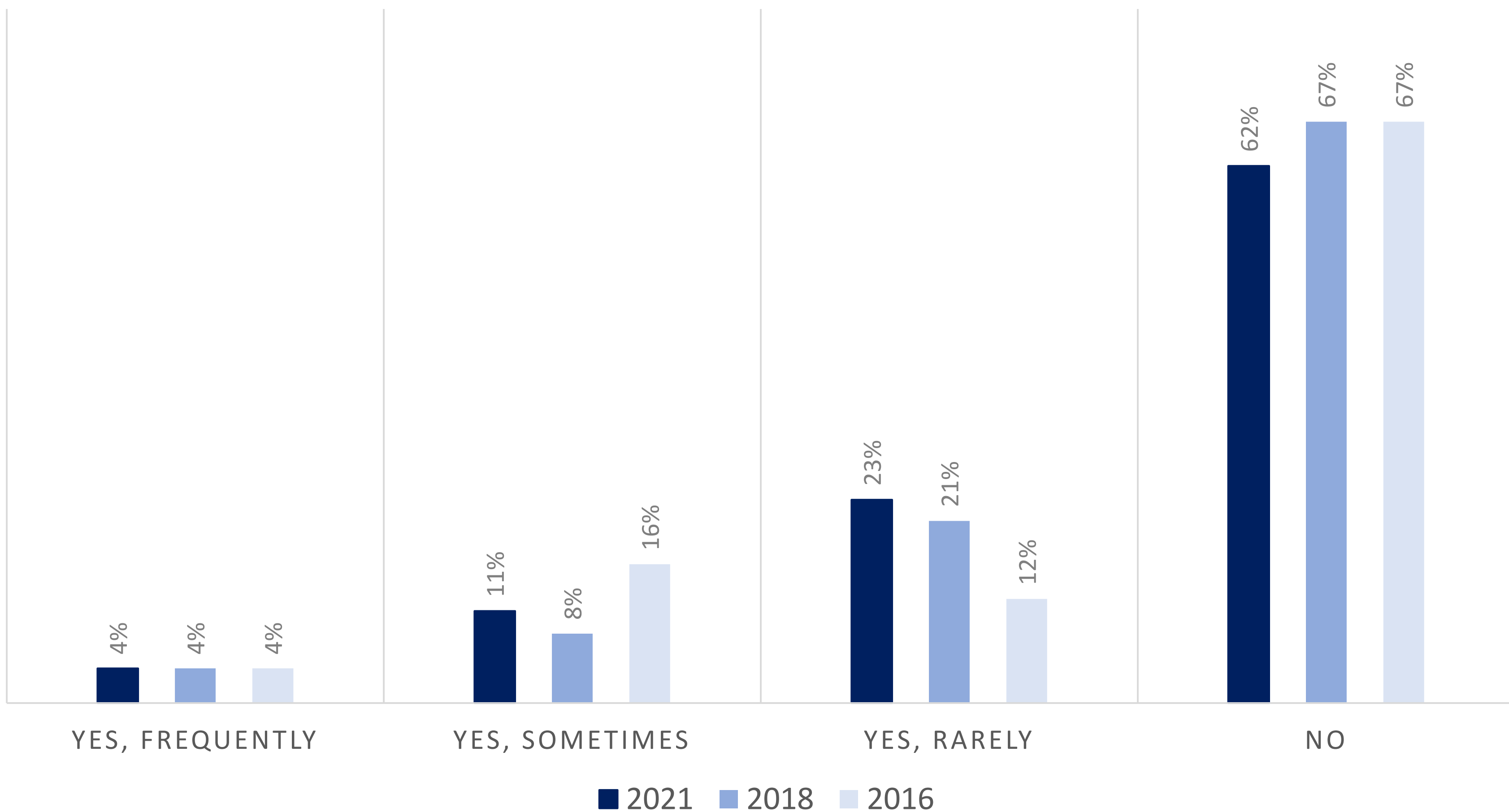
MALTA COMMUNICATIONS AUTHORITY

Registered Mail

Registered mail activity

Registered mail sent

Number of Respondents: 500 (2021), 500 (2018)

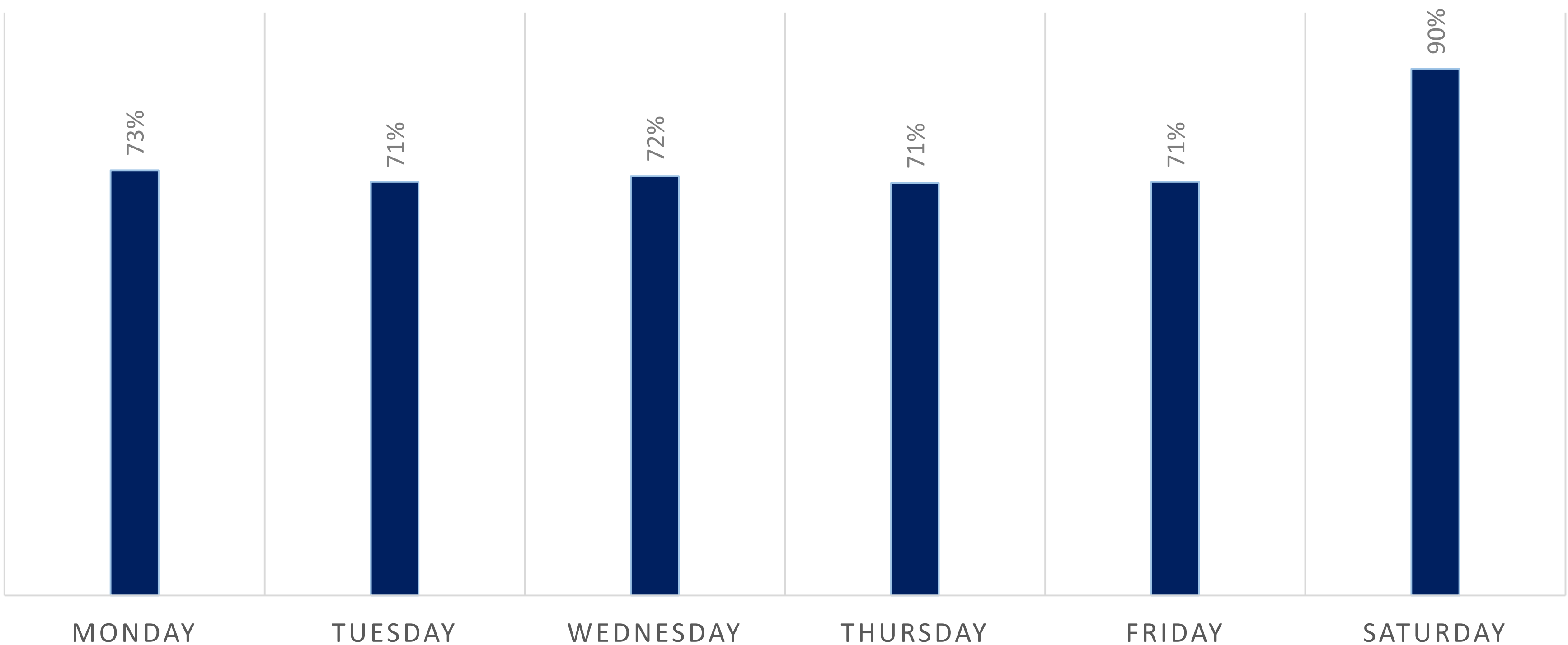


Time convenience to get registered mail

Most convenient day/s to receive registered mail

Number of Respondents: 500

Saturday is the most convenient day for respondents or anyone in their household to receive registered mail (90%).



Receiving Registered Mail

Most Convenient Time/s to Receive Registered Mail

Days	AM	PM	Both AM and PM	Number of respondents
Monday	28%	20%	52%	365
Tuesday	28%	20%	52%	355
Wednesday	28%	20%	52%	360
Thursday	27%	20%	53%	354
Friday	28%	20%	52%	355
Saturday	30%	17%	53%	451

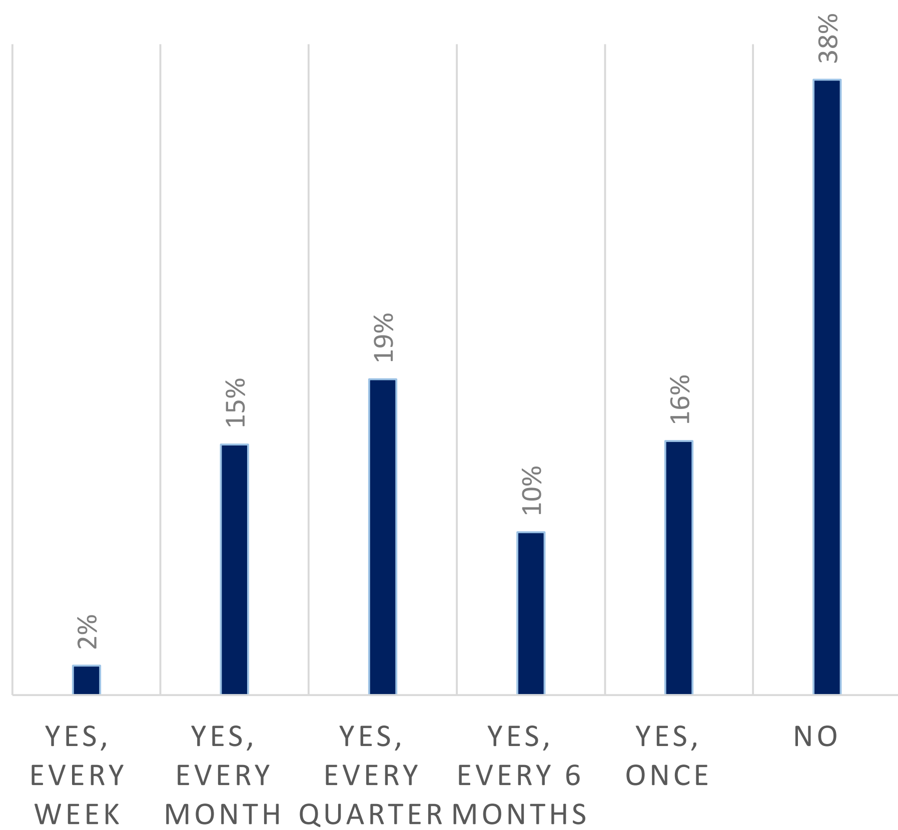
Frequency and reasons for visiting MaltaPost's outlets

Visit to MaltaPost's outlets (1 of 4)

Visits to a postal outlet

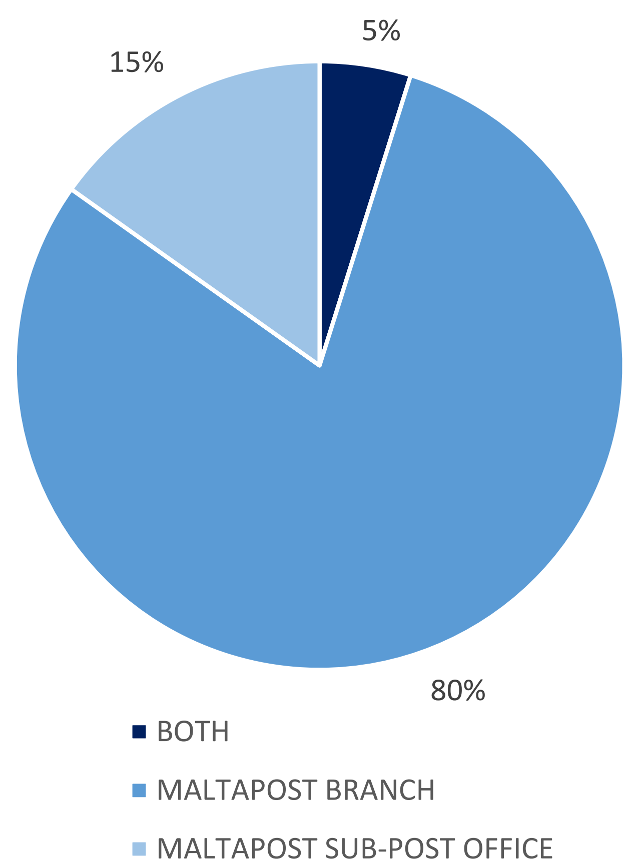
Number of Respondents: 500 (2021)

62% of respondents visited a postal outlet at least once in the last 12 months. Of those who visited a postal outlet, the majority visited a MaltaPost branch.



Kind of post office visited

Number of Respondents: 311



Visit to MaltaPost's outlets (4 of 4)

Please indicate if from a MaltaPost branch or sub-post office

Post Office	Maltapost branch	Sub-post office	Both	Number of respondents
Letter mail	83%	4%	13%	24
Buy stamps	84%	10%	6%	67
Send parcels	83%	11%	6%	35
Collect parcels	76%	15%	9%	145
Return parcels	67%	33%	/	18
Pay bills	84%	12%	4%	115
Cash cheques	77%	15%	8%	13
Collect registered letters	81%	17%	2%	59
Send registered letters	82%	18%	/	39
Deposit money	100%	/	/	2

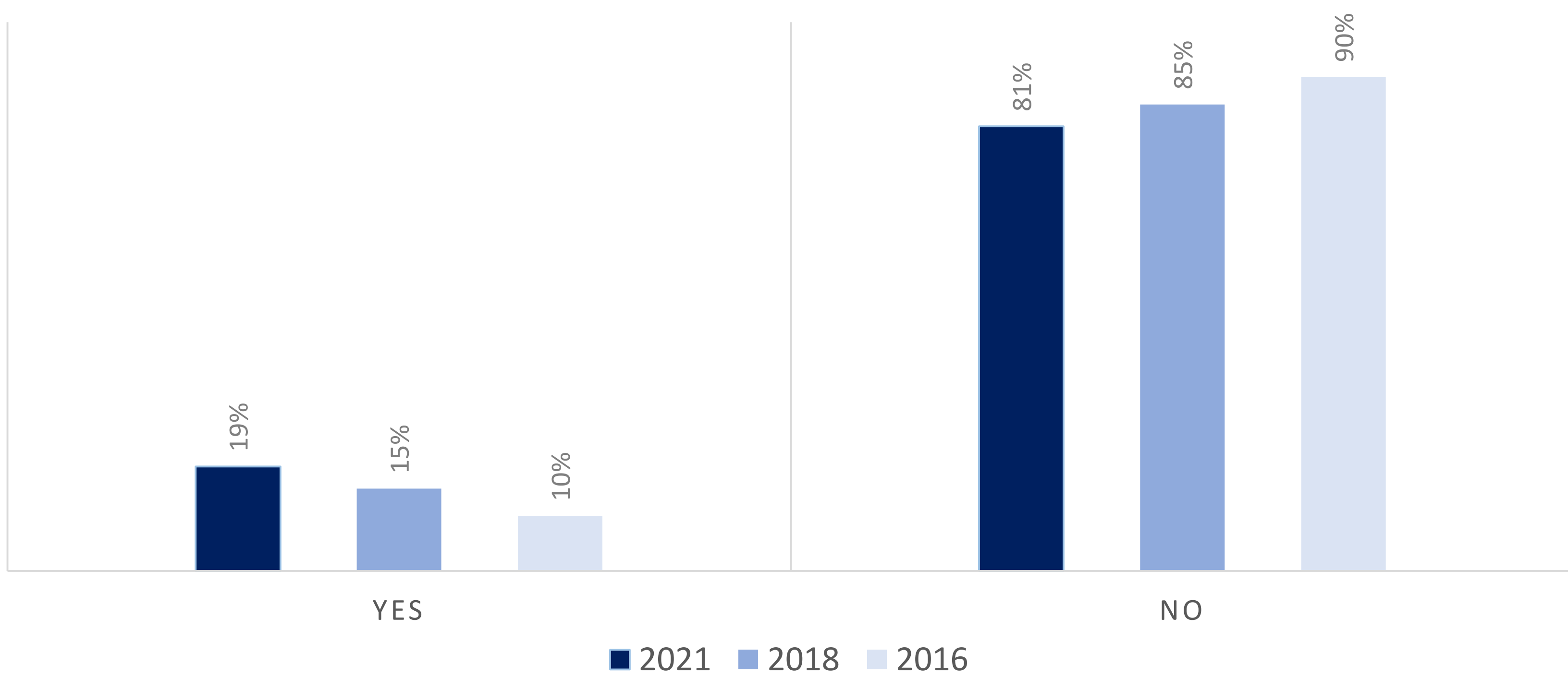
Contact and complaint handling by Maltapost

Contacting MaltaPost

Have you contacted MaltaPost in the last year?

Number of respondents: 500 (2021), 500 (2018)

81% of respondents have not contacted MaltaPost in the last 12 months.

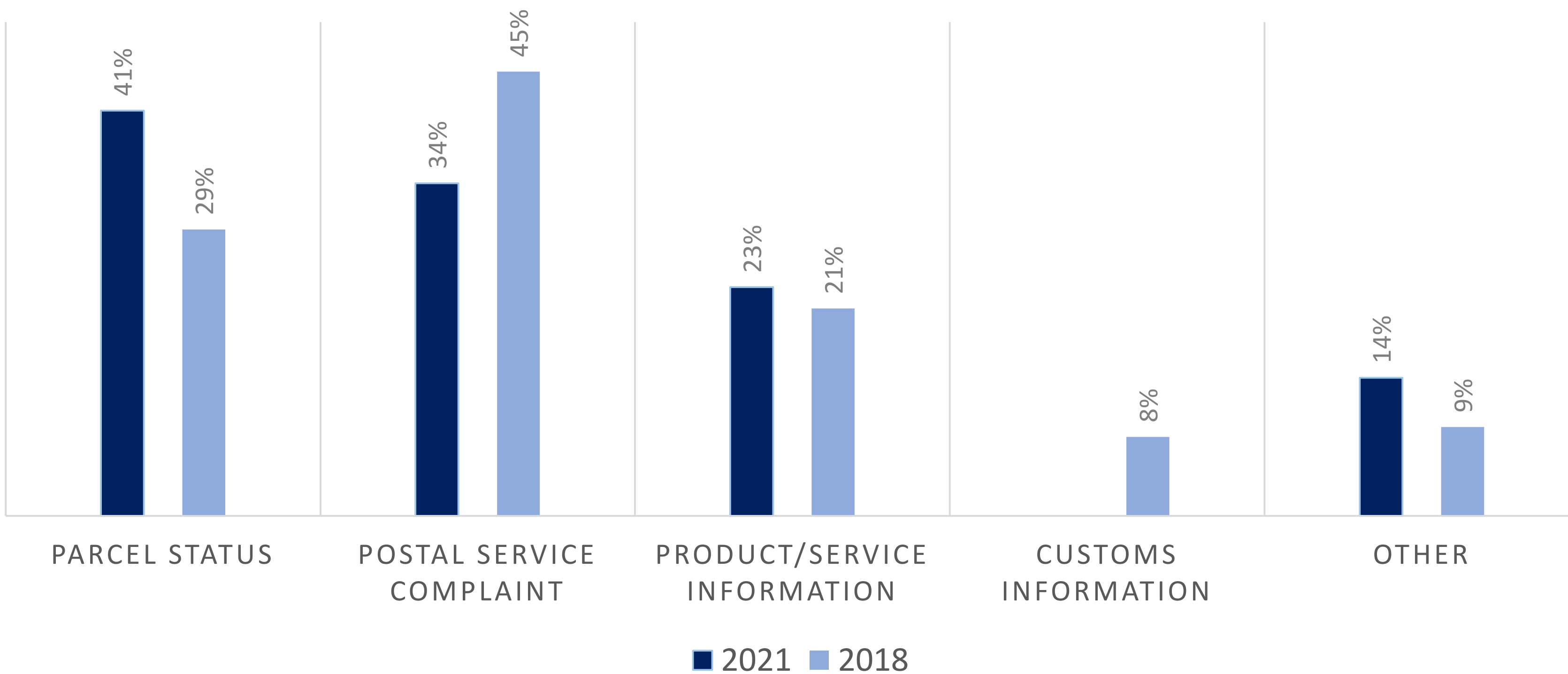


Reasons for contacting MaltaPost

Number of respondents: 95 (2021), 77 (2018)

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

41% of respondents contacted MaltaPost to check the status of their parcel (29% in 2018), whilst 34% contacted MaltaPost to make a postal service complaint (45% in 2018).

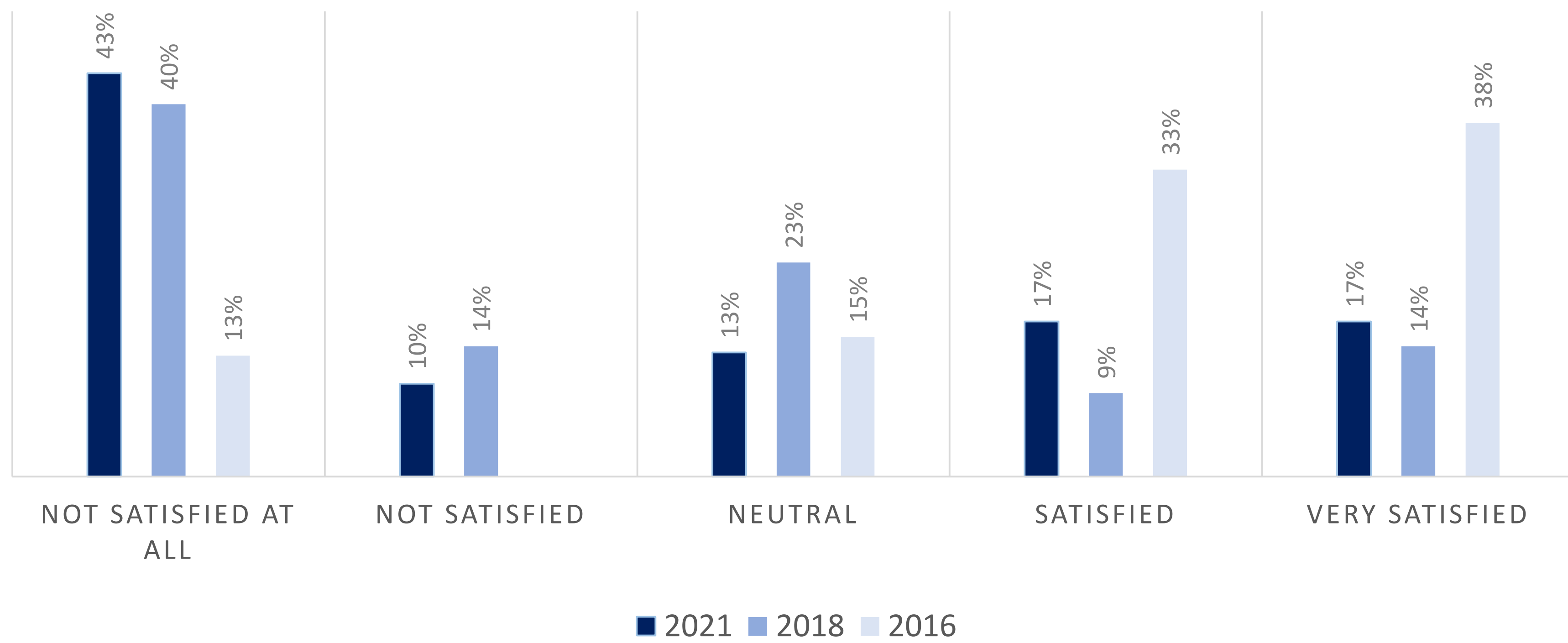


Satisfaction with how a complaint is handled by Maltapost

Number of respondents: 30 (2021), 35 (2018)

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

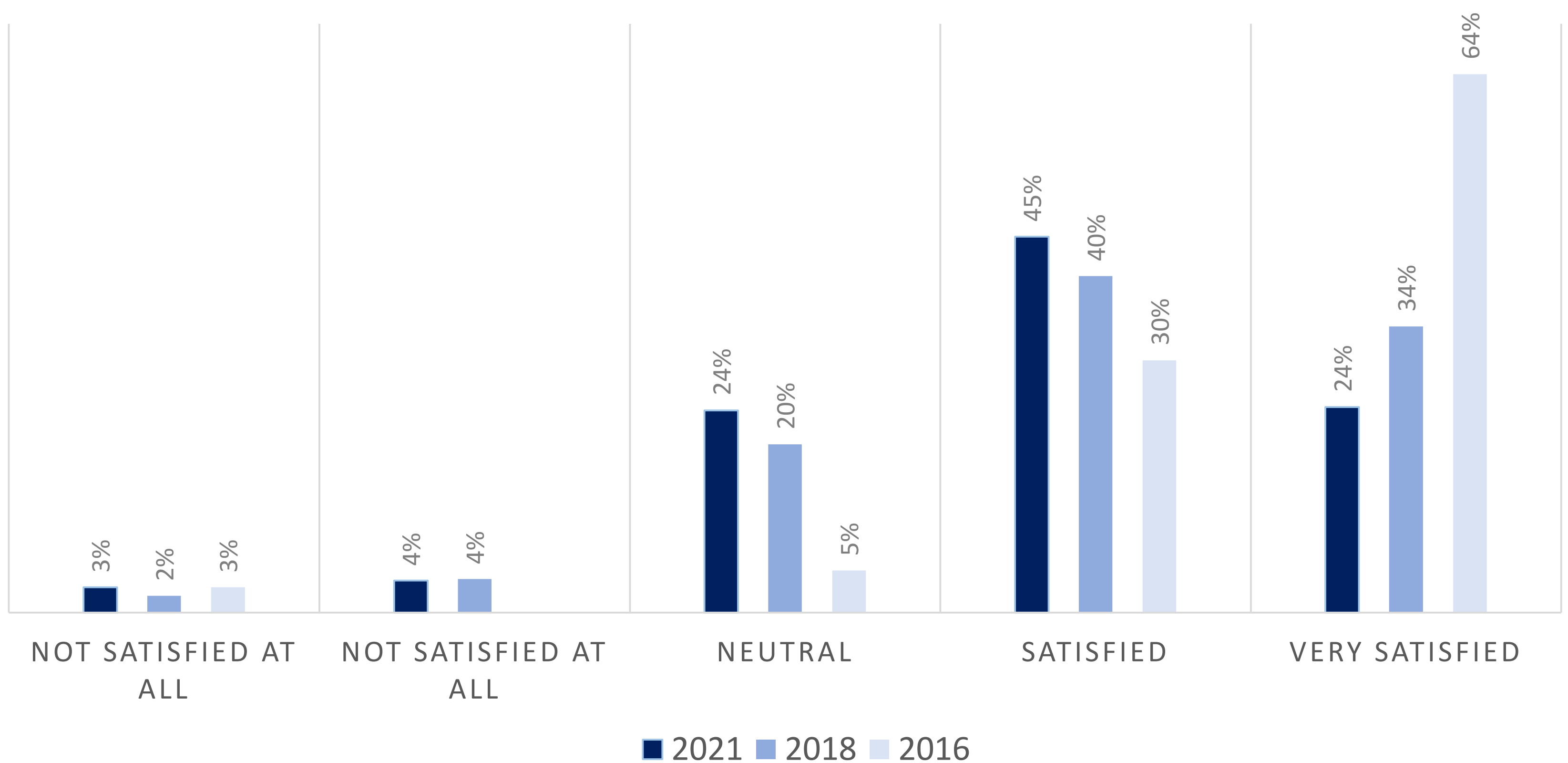
34% of respondents were satisfied with how the complaint was dealt with (23% in 2018). Conversely, 53% were not satisfied (54% in 2018).



Overall satisfaction with Malta Post's Postal Services

Number of respondents: 500 (2021), 500 (2018)

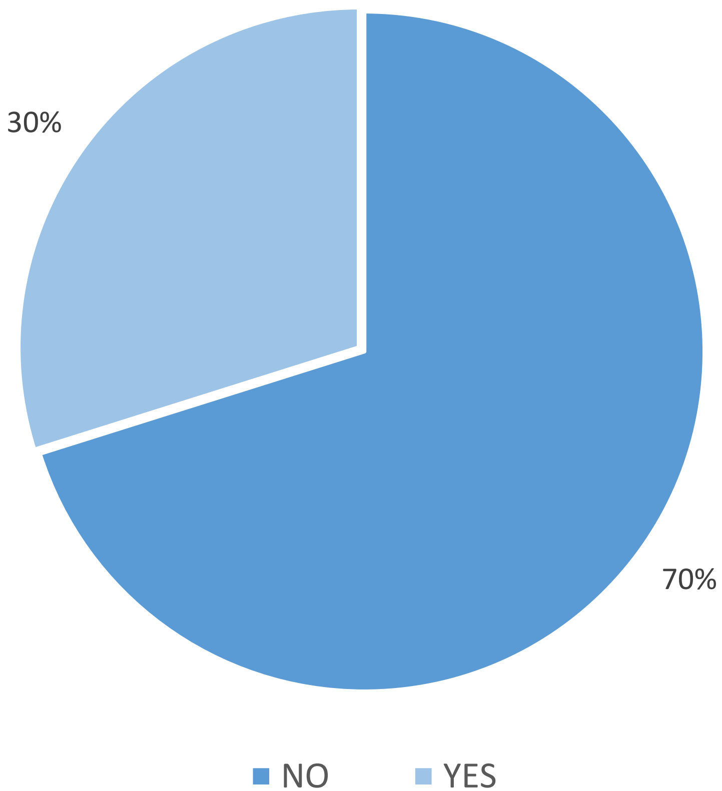
69% of respondents claimed that they are satisfied with the overall quality of the postal services (74% in 2018).



Awareness of MCA's role

Awareness that MCA can deal or assist in a complaint related to a postal service

Number of respondents: 500



30% of respondents are aware that MCA can deal or assist them in a complaint related to a postal service.

Highlights

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.

- People cite email and messaging services as the primary **reasons for the decreases** in letter mail volumes.

- The majority of people (70%) **always** write the post-code. Of those who do not write / always write the post-code, 76% of respondents indicated that they often do not know the postcode of the address.

- Most people (62%) would not consider switching to non-postal alternatives **if the price of a 50g letter had to rise from 30c to 33c**.

Letter Mail (2/2):

- 48% of respondents believe that **‘2 days’** is an acceptable lead-time from date of posting a letter to actual delivery. 43% would not opt for deferred delivery at a discounted tarrif rate.

- 12% of respondents report a **5-day week** as a major inconvenience and the majority would find a **5-day week** as workable or acceptable.

- Most people (61%) would consider it **reasonable if prices were to increase** in order to maintain the current 6-day frequency of delivery.

Parcel Mail (1/4):

- **Number of parcels received from abroad** has generally remained the same or increased for most households.
- **‘Due to COVID-19, the purchasing of some commodities was done online’** was the main reason for an increase in the number of parcels received from abroad in the past twelve months.
- **‘Due to COVID-19, the delivery of some commodities purchased online from some countries was not available’** was the main reason for a decrease in the number of parcels received in the past twelve months.
- The majority of respondents (65%) indicated that there was **no change in the number of domestic parcels / packets** received by their household.
- 70% of respondents have had **delivery of goods from orders placed on local websites** in the past 12 months. Of these, the majority have had deliveries of ready-made meals.

Parcel Mail (2/4):

- Compared to pre-COVID-19, 69% of respondents **have not encountered any difficulties** when they received an addressed parcel / packets during the last 12 months.

- Most respondents have received parcels by **MaltaPost** (49%) or **DHL** (36%).

- 37% of respondents prefer **receiving their parcel at the indicated address**. 28% prefer to collect it from the closest post office.

- 68% of respondents are **aware of the availability of parcel lockers** in Malta, and of these the majority of respondents are aware of MaltaPost parcel locker.

- Of those who are aware of parcel lockers in Malta, 20% indicated that they **have used one** in the last 12 months.

Parcel Mail (3/4):

- If the delivery is missed, 89% would rather **collect the parcel from the nearest post office on the next day**.
- 14% of respondents surveyed **have used forwarding services** and the majority (80%) did so because the vendor did not offer a shipping service to Malta.
- 20% of respondents **used MaltaPost to send a parcel**; the majority of whom addressed their parcel to a foreign European address.
- 45% of respondents are **satisfied / very satisfied with MaltaPost's prices** when it comes to foreign parcel delivery, whilst 39% are neutral on this.

Parcels (4/4):

- 72% of respondents are **satisfied with MaltaPost's parcel service**.
- 10% of respondents **used a different operator** to send parcels. 23% of respondents used other operators because they are faster than MaltaPost and the seller specified the postal operator for returns.

Registered Mail:

- 38% have **sent registered mail** in the last 12 months, and 4% send registered mail frequently.
- 90% of respondents believe that **Saturday is the most convenient day for them or anyone in their household** to receive registered mail.

MaltaPost:

- 62% of respondents **visited a postal outlet** within the last 12 months. Of these, the vast majority visited a MaltaPost branch. Parcel collection (47%) and payment of bills (37%) are the most common **reasons people visit the Post Office**.

- 19% of people have **contacted MaltaPost** within the last 12 months, and of those, 34% contacted MaltaPost to issue a complaint. Loss of mail was the most common complaint (40%).

- 34% of respondents report being **satisfied or very satisfied with how a complaint was handled**.

- Only 30% of respondents are **aware that MCA can deal or assist them in a complaint** related to a postal service.

- 69% of respondents are **satisfied or very satisfied with MaltaPost's overall service**.

Thank You

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