

# ComReg Residential Postal Survey 2005

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Prepared by Amárach Consulting

- Introduction
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- Appendix:  
Notes on Methodology and Data Interpretation

# Introduction

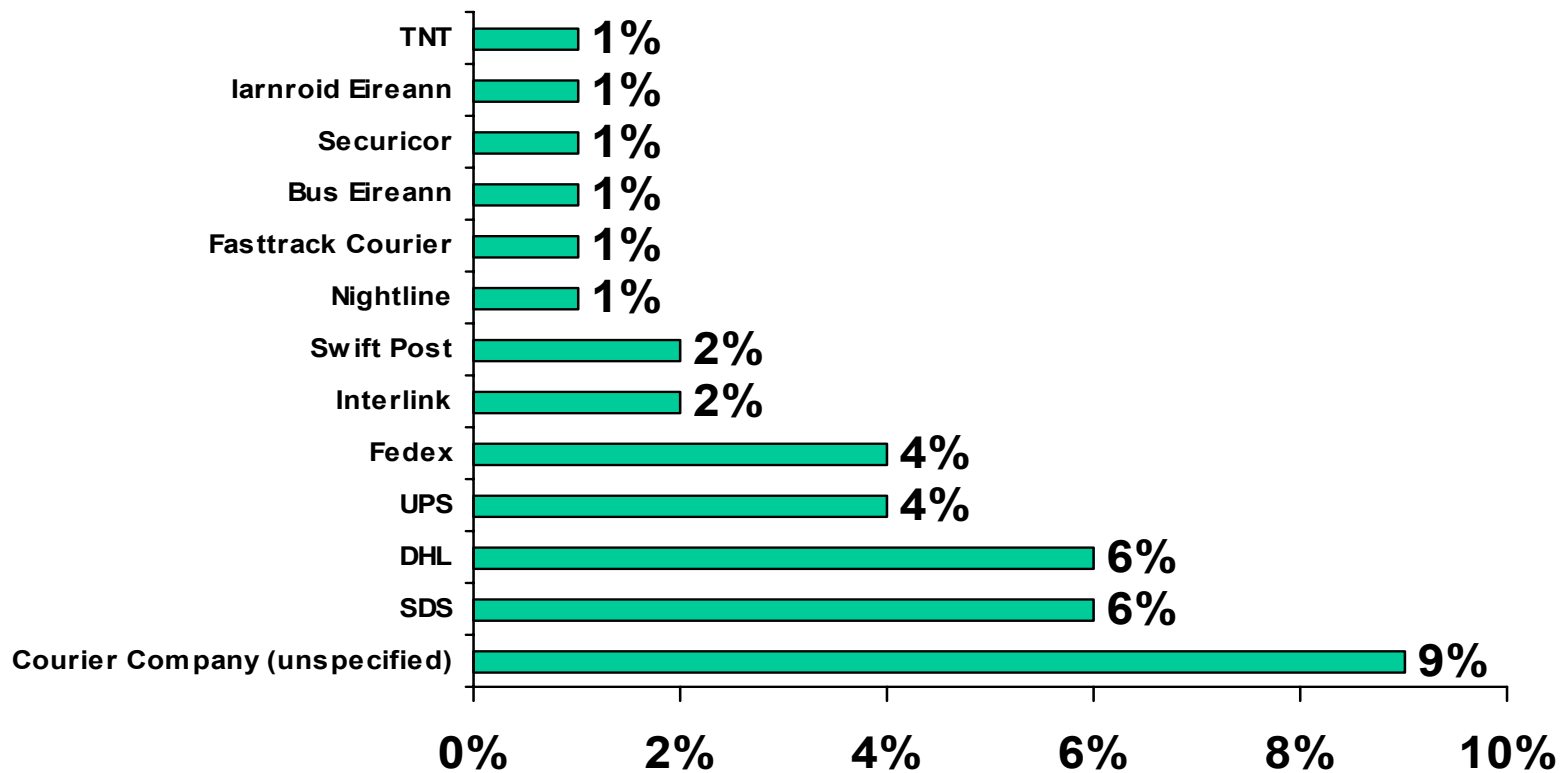
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- The research contained in this report is based on a quarterly survey by Amárach Consulting of 1,008 adults throughout Ireland, aged 15-74.
- The survey was conducted from August 8<sup>th</sup> – September 1<sup>st</sup> 2005, and the results have been weighted up to the total adult population aged 15-74 using the most recent CSO statistics.
- In presenting the findings we have taken care to report the sample sizes for each question analysed and we would draw the reader's attention to the table at the end of this report explaining the statistical variance applicable to all survey based studies of this nature.

# Awareness and Use of Other Postal Services

# Awareness Levels of alternative postal companies to An Post

## Companies aware of that you could use for sending post, other than An Post

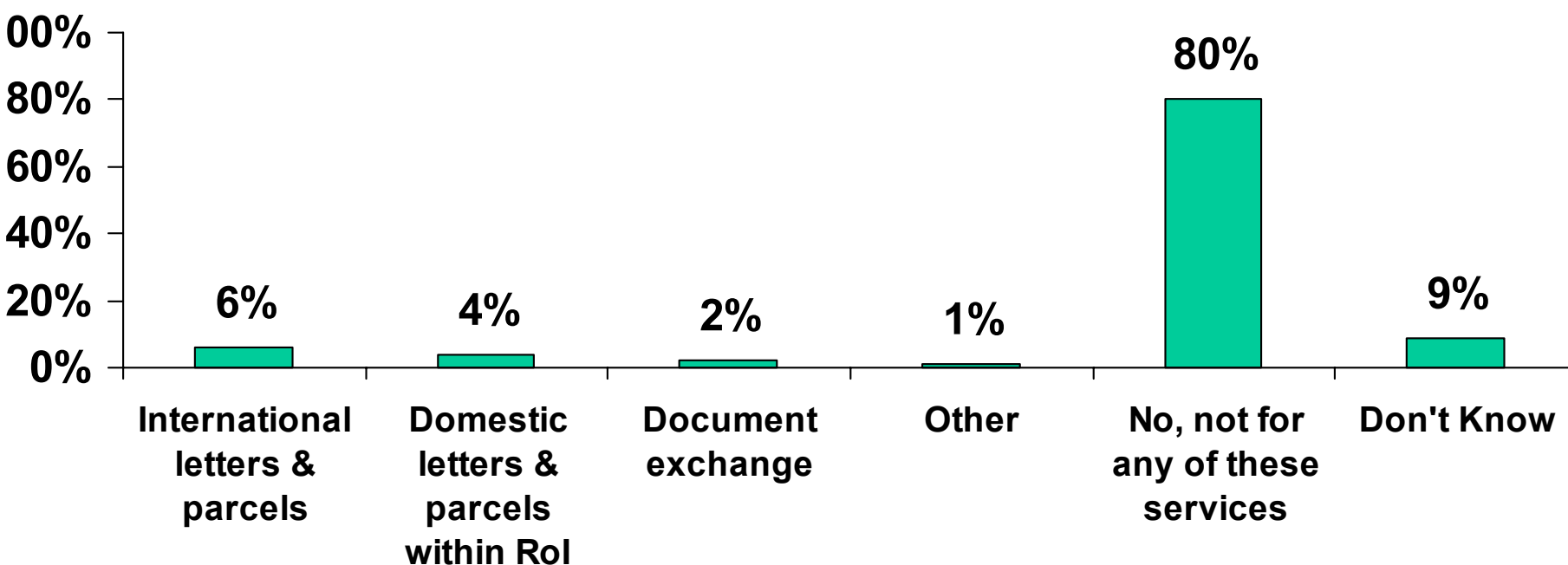


9% of all respondents indicated that they were aware of courier companies (unspecified) as an alternative – in certain cases a specific courier company was mentioned.

Case: All respondents (n=1008)

# Services Where Other Companies Than An Post Have Been Used

"Have you used any other company other than An Post for any of the following services?"



**1 in 5 has used other companies than An Post.**

Base: All respondents (n=1008)

# Usage of Postal Services



# Proportion of Mail Received From National vs. International Destinations

Respondent based:

	National	International
0%	0%	47%
1-50%	4%	45%
51-75%	6%	0%
76-99%	36%	1%
100%	47%	0%
Don't Know	7%	7%

Average '05:	92%	16%
Average '04*:	87%	13%

Base: All respondents (n=1008)

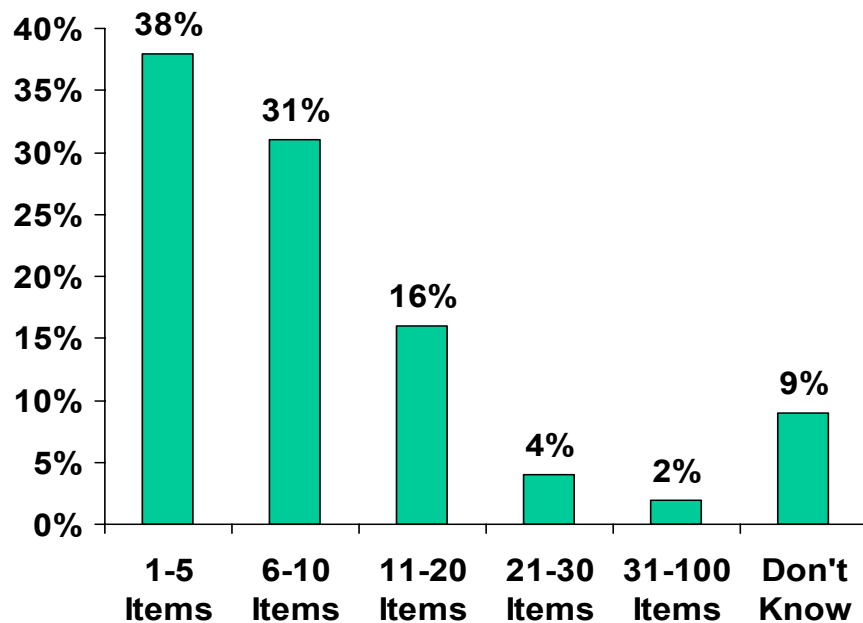
\* '04 source: TNS mrbi

- 47% of all respondents state that all of their post originates from a national / Northern Irish source. In particular 55-74s, C2DEs and people living in Rest of Leinster state this.
- 29% of all respondents state that up to 10% of post received originates from an international source.

Note: Average percentages will not add up to 100% when combined responses for all respondents are used to calculate average scores.

# Number of Mail Items Received

**"On an average, how many items of mail does the postman deliver to your home address each week?"**



- 38% of respondents have 1-5 items of mail delivered to their homes per week
- 69% have 1-10 items delivered
- 85% have 1-20 items delivered

*Base: All respondents (n=1008)*

# Items of Mail Delivered to Home Address Weekly

Mean scores		2005
<b>TOTAL</b>		<b>9.0</b>
Gender	<i>Male</i>	9.4
	<i>Female</i>	8.6
Age	<i>15-24</i>	9.3
	<i>25-34</i>	8.3
	<i>35-44</i>	8.6
	<i>45-59</i>	11.2
	<i>60+</i>	6.8
Social Class	<i>AB</i>	13.1
	<i>C1</i>	10.2
	<i>C2</i>	7.8
	<i>DE</i>	6.6
	<i>F</i>	9.2

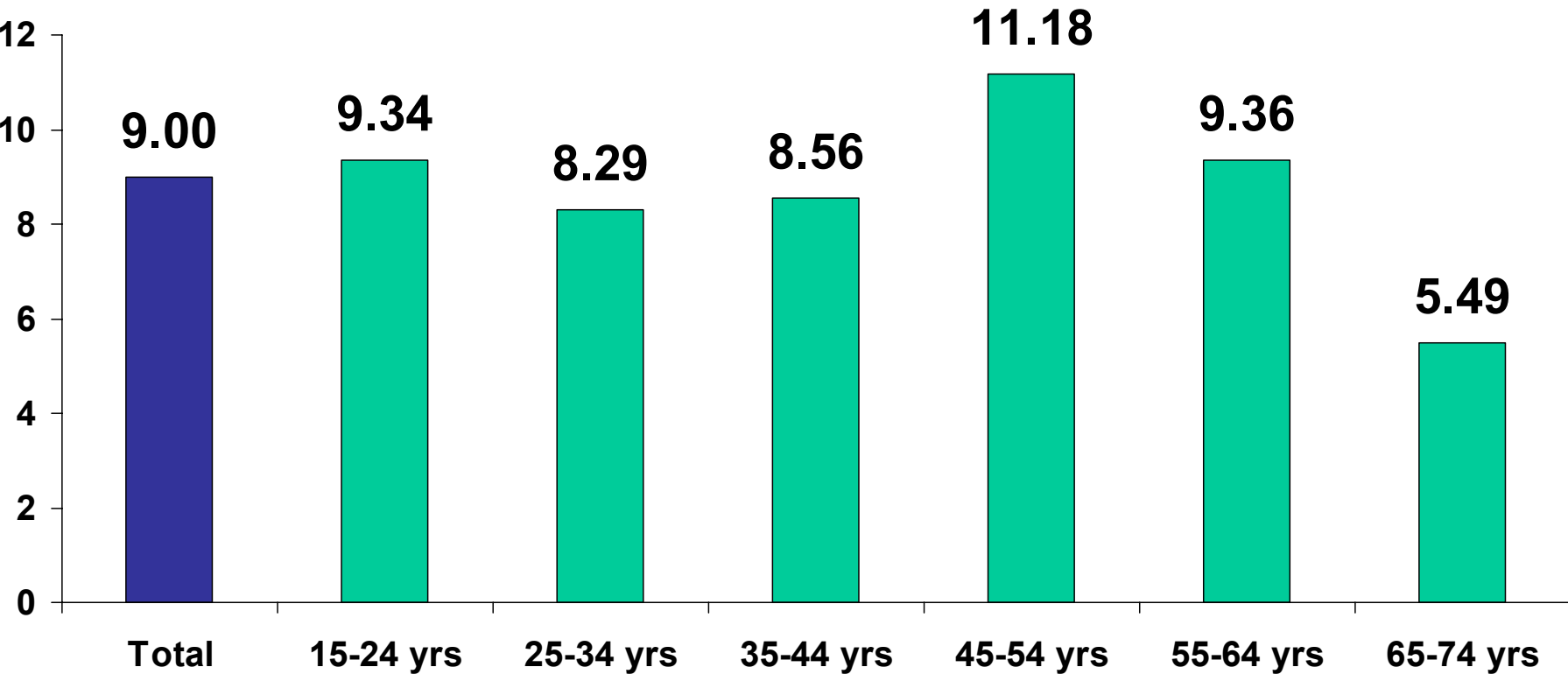
Mean scores		2005
No of people in household	<i>One</i>	5.4
	<i>Two</i>	8.1
	<i>Three</i>	8.2
	<i>Four</i>	10.9
	<i>Five</i>	9.2
Region	<i>Dublin</i>	9.2
	<i>RoL</i>	8.0
	<i>Munster</i>	9.2
	<i>Conn/Ulst</i>	9.7
Weekly volume sent	<i>None</i>	6.0
	<i>1-5</i>	7.3
	<i>6-10</i>	12.1
	<i>11-20</i>	24.1
Business from home	<i>Yes</i>	15.2

base: All respondents receiving mail (n=999)

\* '04 source: TNS mrbi

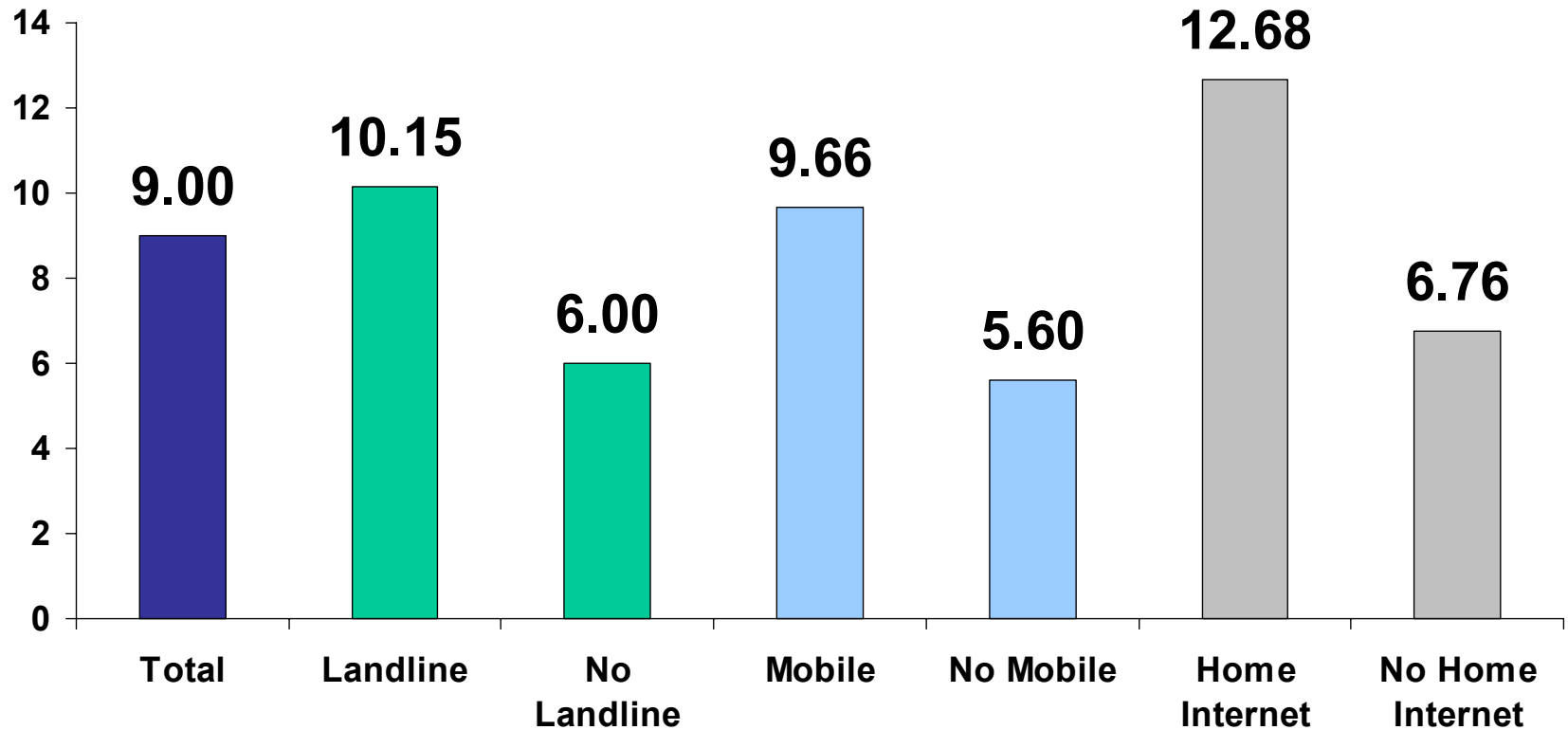
# Items Delivered by Age Demographic

"On an average, how many items of mail does the postman deliver to your home address each week?"



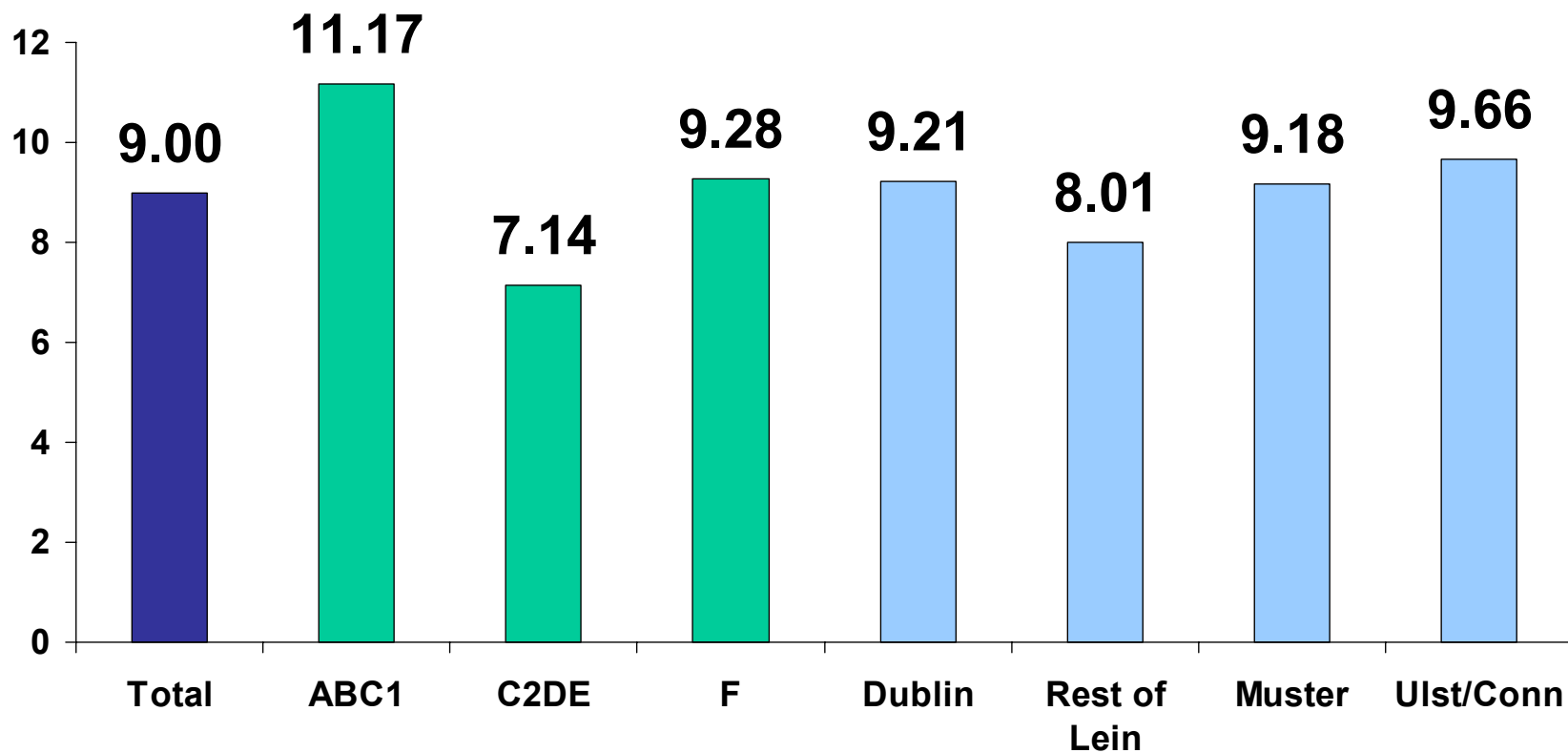
# Items Delivered by Land Line, Mobile and Internet Subscribers

"On an average, how many items of mail does the postman deliver to your home address each week?"



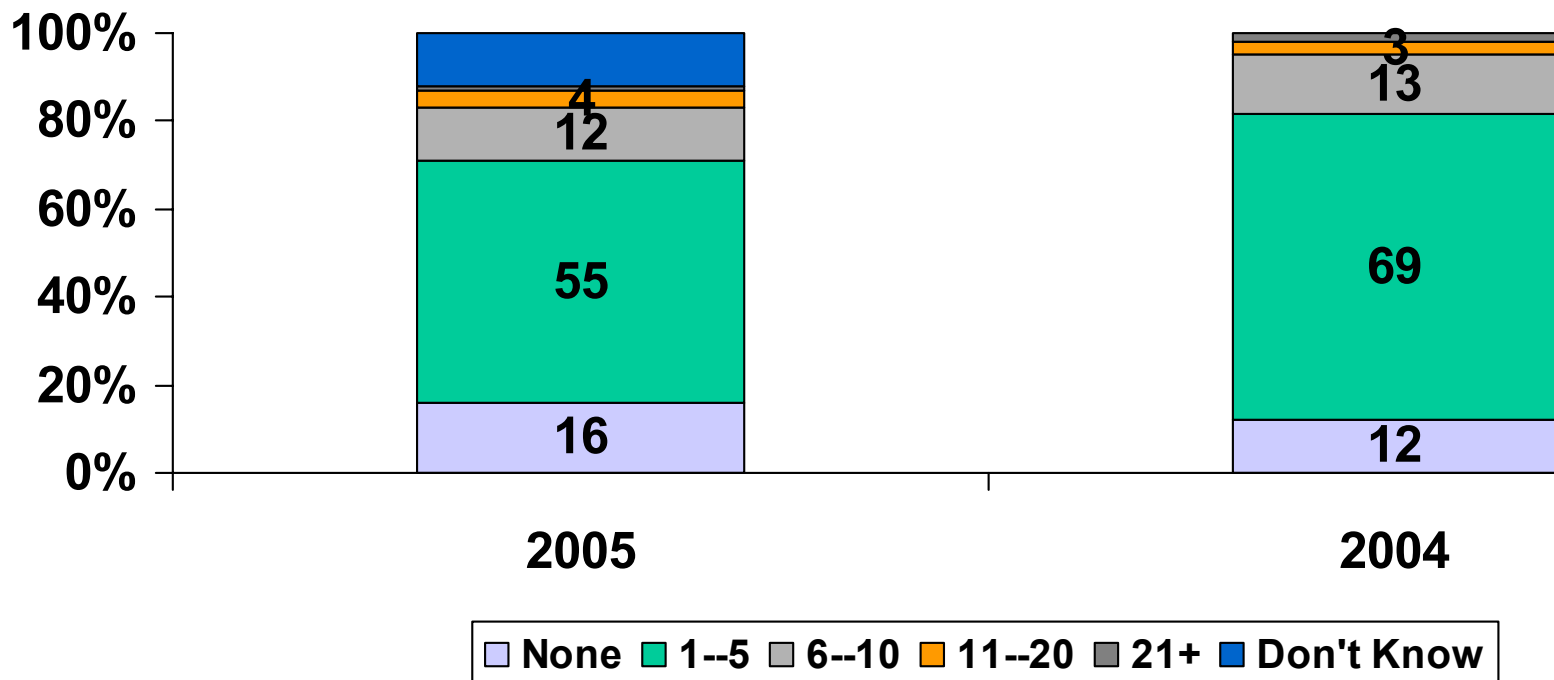
# Items Delivered by Social Class and Region

"On an average, how many items of mail does the postman deliver to your home address each week?"



# Frequency of Sending Mail

"How many standard size envelopes are posted by your household each week?"



**55% of all respondents post between 1 and 5 standard size envelopes from home each week.**

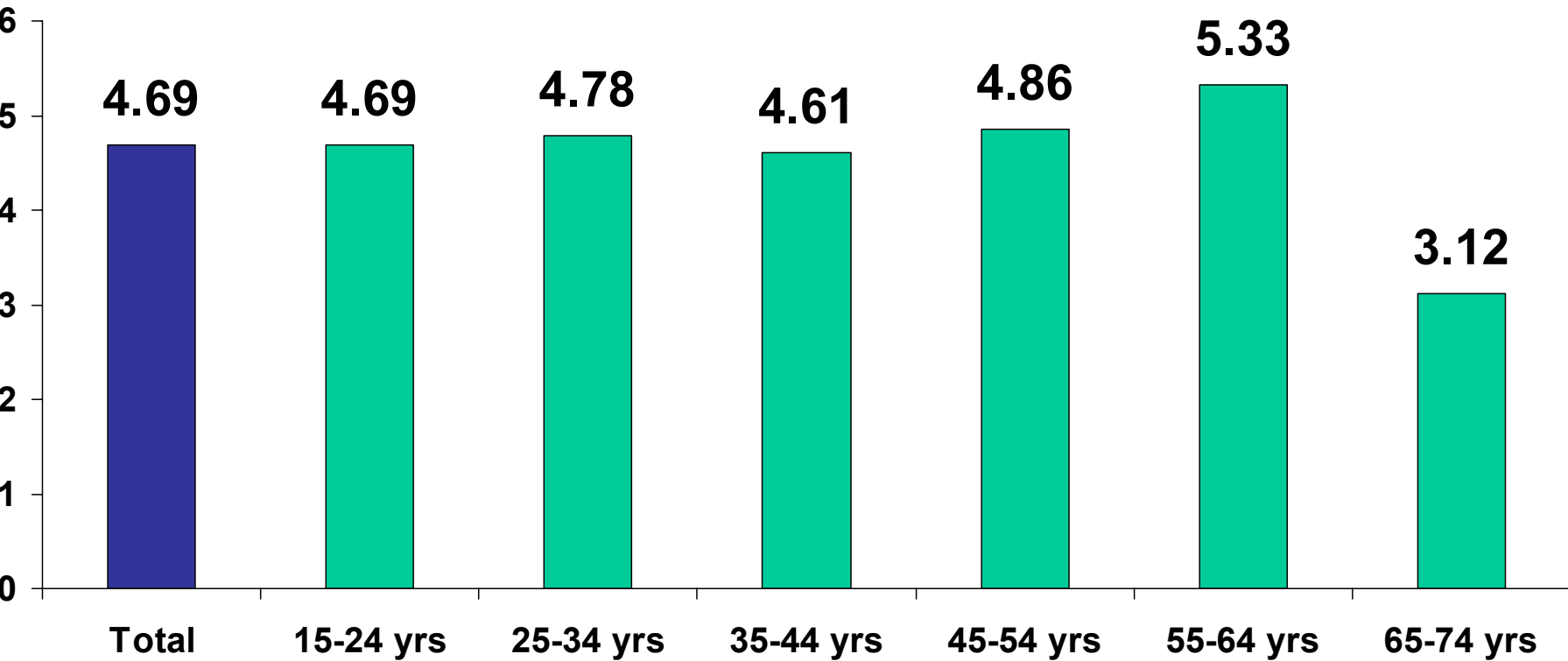
Base: All respondents (n=1008)

\* '04 source: TNS mrbi

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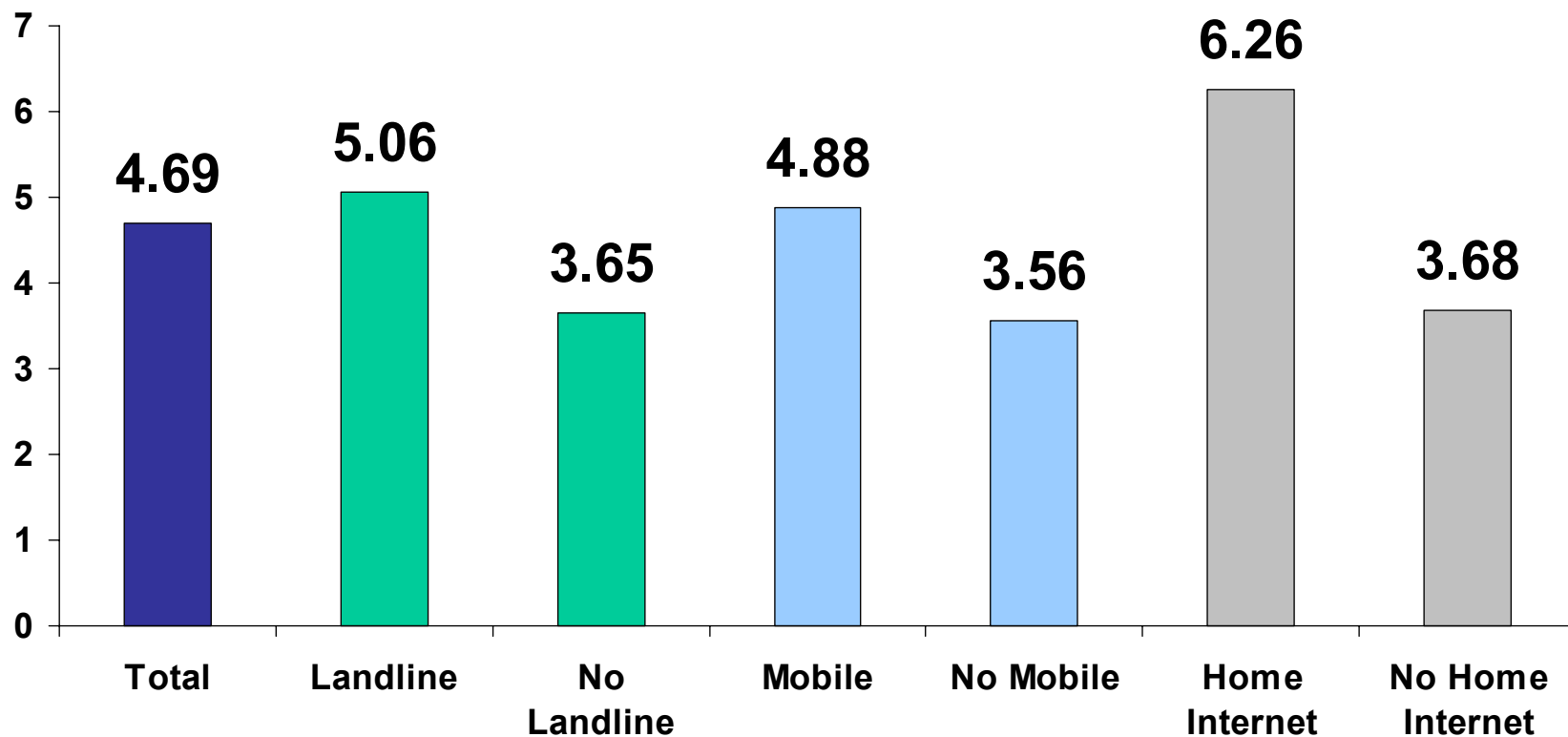
# Items Sent by Age Demographic

"On an average, how many standard sized envelopes are posted by your household each week?"



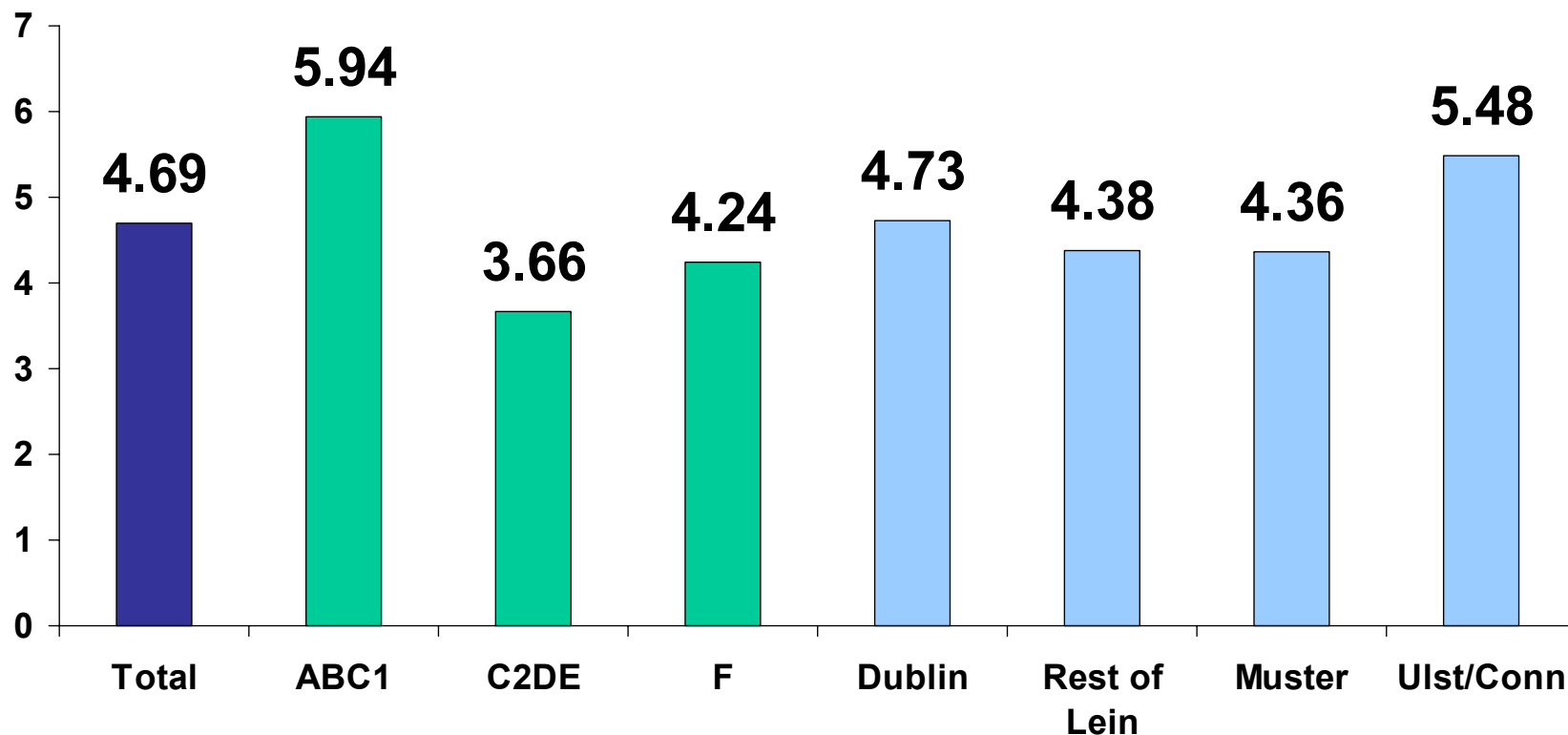


"On an average, how many standard sized envelopes are posted by your household each week?"



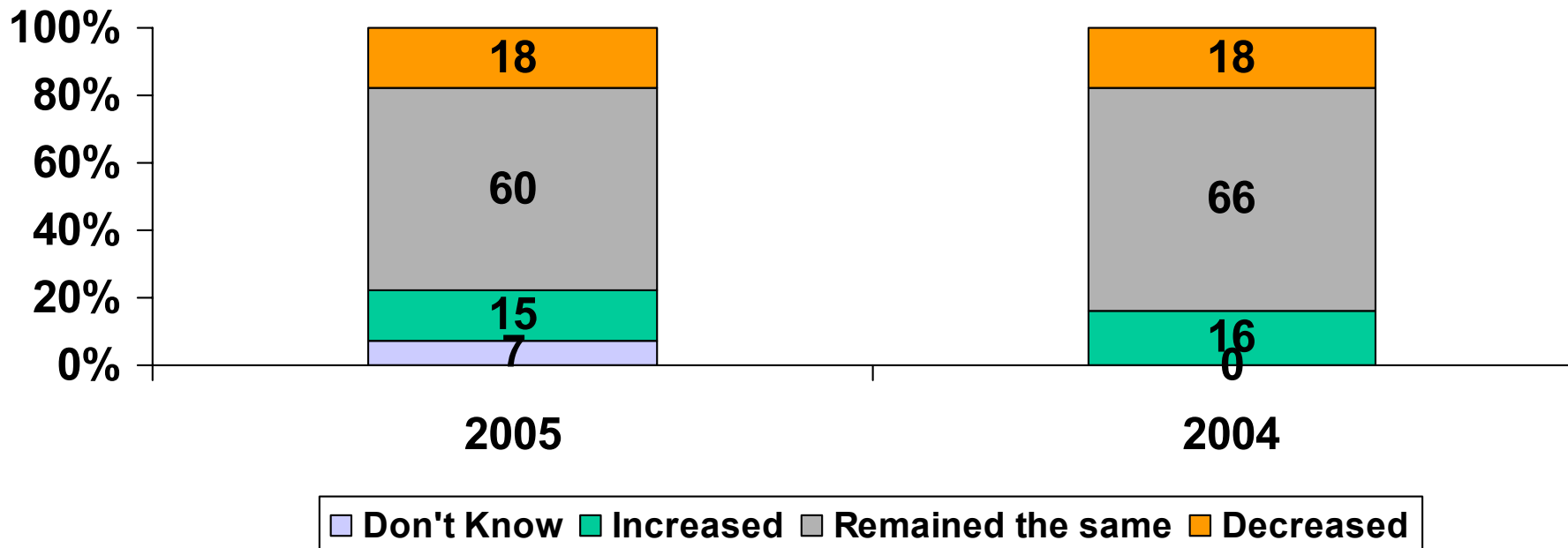
# Items Sent by Social Class and Region

"On an average, how many standard sized envelopes are posted by your household each week?"



# Volume of "Personal" Letters Received

"Can you tell me if the number of letters you receive each week has increased, decreased or remained the same over the past 12 months - PERSONAL LETTERS?"



**6 in 10 respondents believed the volume of personal letters they have received has remained unchanged in the last 12 months.**

Base: All respondents (n=1008)

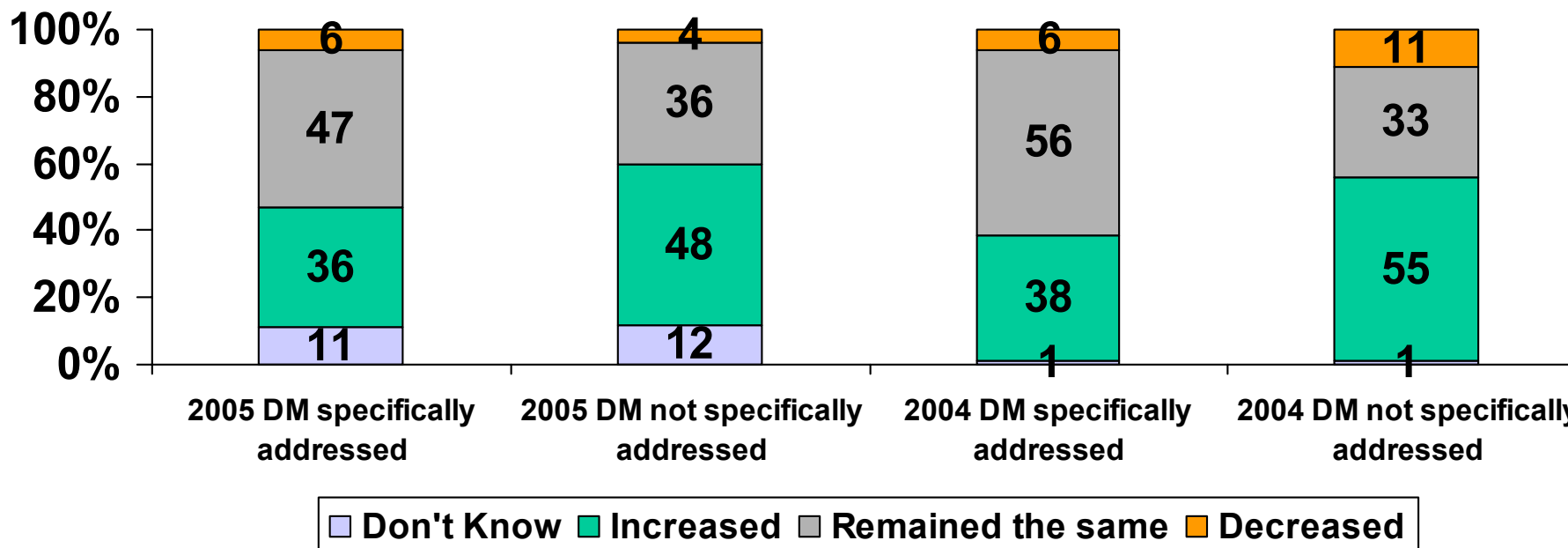
\* '04 source: TNS mrbi

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# Volume of Direct Mail Received

"Can you tell me if the number of letters you receive each week has increased, decreased or remained the same over the past 12 months - DIRECT MAIL?"



**DM not specifically addressed have increased to a greater extent than specifically addressed.**

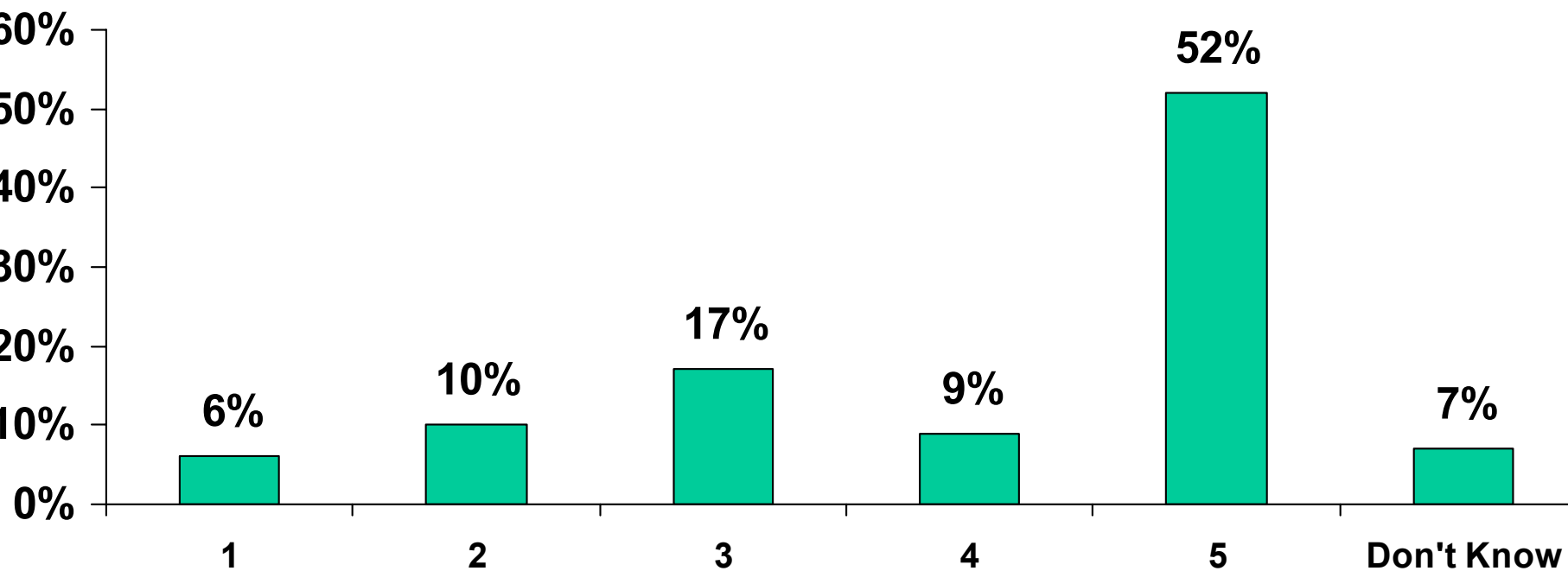
Base: All respondents (n=1008)

\* '04 source: TNS mrbi

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# Frequency of Home Postal Service

"On how many days per week does the Postal Service deliver addressed mail to your home ?" ...



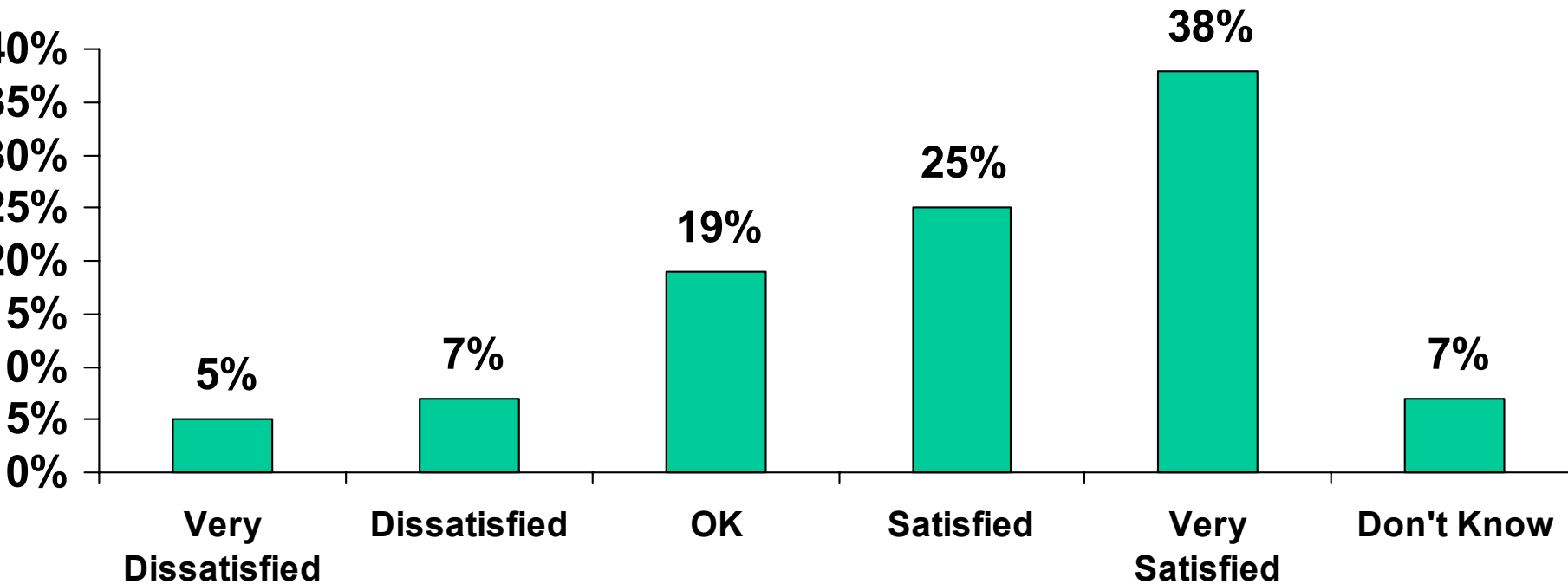
**More than 1 in 2 receives addressed mail to their home address five times per week.**

Base: All respondents (n=1008)

# Satisfaction with the Postal Service

# Satisfaction Levels - Postal Service

"The time it has taken to deliver your letters (based on indication when it was posted)"

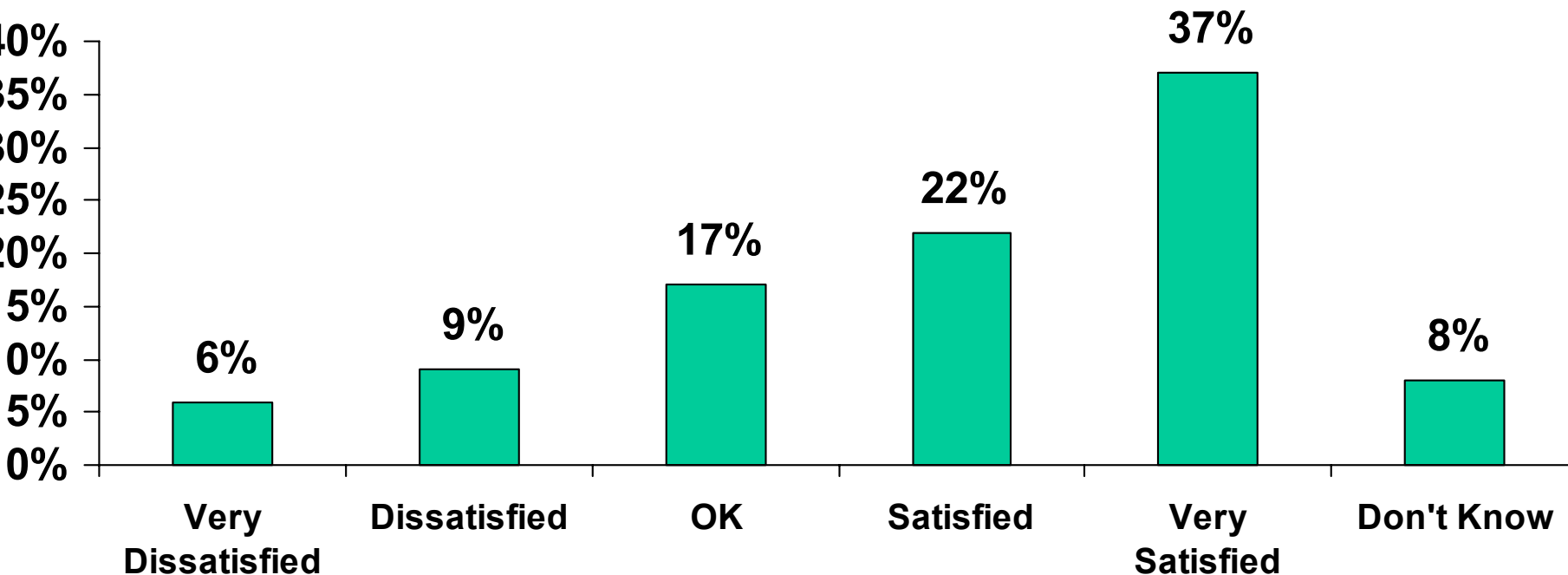


**63% of all respondents are satisfied. Dubliners are more likely to be dissatisfied than people from other regions.**

Base: All respondents (n=1008)

# Satisfaction Levels - Postal Service

"The latest collection time for next day delivery from where you normally post your letters (last pick up daily from your post box)"



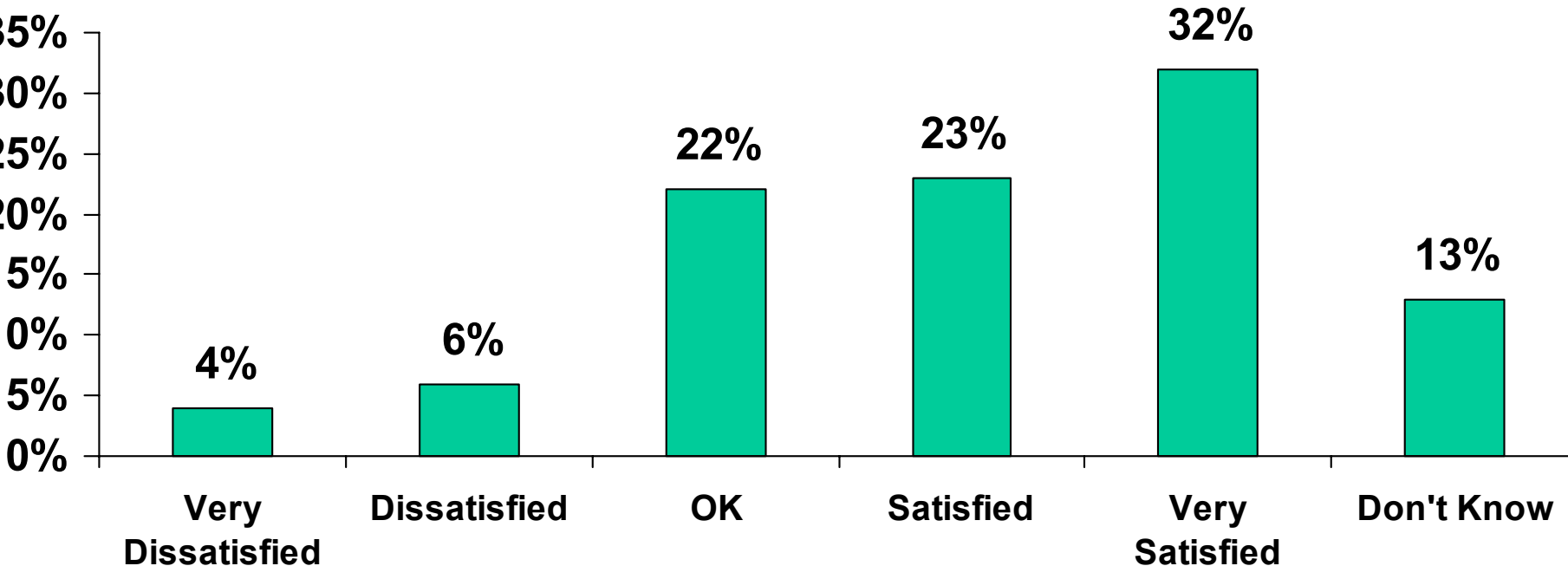
**59% of all respondents are satisfied. ABC1s and respondents with 3<sup>rd</sup> level education are more likely to be dissatisfied than other groups.**

Base: All respondents (n=1008)



# Cost of Postage

"Can you tell me how satisfied you are with the general cost of postage stamps?" ...

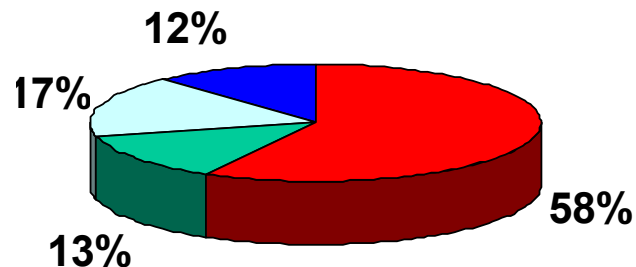


**49% of all respondents are aware of the correct price of a postage stamp for a standard sized envelope.**

Base: All respondents (n=1008)

# Cost of Postage Value for Money?

'Do you feel that the cost of postage in general represents good value for money'?



Base: All respondents (n=1008)

■ Yes 
 ■ No 
 ■ It depends 
 ■ Don't Know

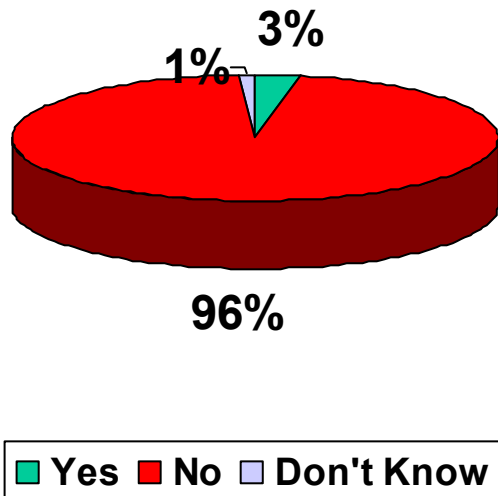
58% of all respondents feel that the cost of postage represents good value for money. Cost is by this group of people perceived to be low, quality of service is rated as good and service is valued as reliable.

Reasons why cost of postage is good value (n=586)	%
The Cost is relatively low	52%
The quality of the service is good	40%
The service is reliable	27%
Other	2%
Don't Know	3%

Reasons why cost of postage is NOT good value (n=130)	%
There is no choice of another service at the same cost or less	34%
The quality of the service is poor	32%
Too expensive	27%
The service is unreliable	16%
Not next day delivery	2%
Competition	1%
Don't Know	6%

# Postal Complaints

**"In the past 12 months, have you personally made a complaint to any organisation about any aspect of the postal service?"**



*Base: All respondents (n=1008)*

- Only 3% of all respondents have made a complaint to any organisation about the postal service in the past 12 months.
- Of those who made a complaint, 8 in 10 complained to An Post. (Note: small base)
- In the past 12 months, 9 in 10 of those who made a complaint did so about An Post. (Note: small base)
- 1 in 2 of complaining respondents reported that they were dissatisfied with the handling of their complaint by the organisation that they contacted. (Note: small base)

# Survey Findings

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# Survey Findings

- On average 9 items of mail are delivered to each home address every week. The 45 -54 age group receive over 11 items and those with home internet receive 12.7 items. Dublin mail items received average at 9.2 whilst the rest of Leinster is at 8.0.
- On average 4.7 items of mail were posted weekly by each household. Again the 45 – 54 age group sent most mail. The Connaught / Ulster provinces posted 5.5 items where as Dublin was found at 4.7. Employed people and those with home internet access are the groups showing highest average weekly levels.
- 6 in 10 respondents stated that the number of personal letters they have received each week has remained the same in the last 12 months.
- Clearly more respondents say that they receive more Direct Mail (DM) than 12 months ago compared to those who have noted a decrease. DM not specifically addressed has increased to a greater extent than specifically addressed DM.
- 1 in 2 only receives domestic post – in particular 55-74s, C2DEs & respondents from Rest of Leinster.
- 1 in 2 receives addressed mail five times per week.
- At the time of the survey in August / September 2005, 55% are satisfied with the general cost of postage. 1 in 2 are aware of the exact cost of a “regular” stamp. Whilst 3 in 5 thought cost of postage represented good value for money
- Overall about 3 in 5 are satisfied with the postal service mail delivery times and post box collection times. However Dubliners are more likely to be dissatisfied than people from other regions. ABC1a and respondents with 3rd level education are more likely to be dissatisfied than other groups.
- Only 3% have made a complaint to any organisation about the postal service in the last 12 months. Of those who made a complaint 8 out of 10 complained to An Post. 1 in 2 of complaining respondents reported that they were dissatisfied with the handling of their complaint by the organisation that they contacted.
- 1 in 5 respondents have used other companies than An Post for sending international/domestic letters and parcels or document exchange.

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# **Appendix:** **Notes on Methodology and Data Interpretation**

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# Methodology

- 1,008 people surveyed aged 15 – 74.
- Fieldwork conducted: August 8<sup>th</sup> – September 1<sup>st</sup> 2005.
- Nationally representative survey with inter-locking controls set for age, gender, and marital status. Non-interlocking controls set for social class and region.
- Findings weighted up to represent the full population of adults aged 15-74 in the Republic of Ireland based on the most recent findings from the CSO.
- Surveys were conducted face-to-face in respondents' own homes at over 101 different locations throughout the Republic of Ireland.
- Given the sample size, there is a margin of error of +/-3%.

# Data Interpretation

The table opposite shows the margin of error for a range of unweighted sample sizes

If 20% of a total sample of 1,000 adults say they do something, you can be 95% certain that the figure for the population lies between 17% and 23% (i.e. there is a margin of error of 3%)

As the sample size is reduced the margin of error increases

To determine the margin of error on a particular section look at the unweighted sample size on each question i.e. the "n" (number of respondents to that question) at the base of each slide

Percentage of respondents who said...	1,000	500	100
10%	+/-2%	+/-3%	+/-6%
20%	+/-3%	+/-4%	+/-8%
25%	+/-3%	+/-4%	+/-8%
40%	+/-3%	+/-5%	+/-10%
50%	+/-4%	+/-5%	+/-10%
60%	+/-3%	+/-5%	+/-10%
75%	+/-3%	+/-4%	+/-8%
80%	+/-3%	+/-4%	+/-8%
90%	+/-2%	+/-3%	+/-6%

- If the "n" or number of respondents to a particular question falls below **75** the findings are in no way representative and should be only regarded as indicative and not overly analysed or interpreted