



# Postal Service Residential Survey 2010

December 2010

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# Introduction

# Background & Objectives

- The Commission for Communications Regulation (ComReg), commissioned Ipsos MRBI, an independent market research company to conduct research amongst residential consumers in relation to the postal service market.
- The overall objective of the research was to gain a better understanding of residential consumer attitudes towards the postal services on offer and the postal service providers in Ireland.
- More specifically, the survey covered the following topics:
  - Awareness and Usage of Postal Service Providers
  - Volumes of Mail Sent
  - Volumes of Mail Delivered
  - Attitudes to the Postal Service
  - Complaints Experience
  - Awareness of Market Liberalisation
  - Internet Usage and Postal Services

- A quantitative face-to-face approach was adopted amongst a nationally representative sample of adults aged 18-74 throughout the Republic of Ireland.
- A total sample of 1,003 adults were interviewed.
- Interlocking quotas were set on gender and age, and non-interlocking quotas were set on region and social class.
- The data was weighted at analysis stage, to reflect the exact demographic profile of the Republic of Ireland.
- Comparisons are made with the 2009 benchmark survey, where relevant.
- Face-to-face fieldwork was conducted between 27th September – 24th October, 2010.

# Analysis of Sample



Base: All Respondents 18-74 yrs: 1,003

# Social Class Definitions

- |           |  |
|-----------|--|
| <b>A</b>  | These are professional people, very senior managers in business or commerce or top-level civil servants.   |
| <b>B</b>  | Middle management executives in large organizations, with appropriate qualifications. Principal officers in local government and civil service. Top management or owners of small business concerns, education and service establishments.                     |
| <b>C1</b> | Junior management, owners of small establishments, and all others in non-manual positions. Jobs in this group have very varied responsibilities and educational requirements.  |
| <b>C2</b> | All skilled manual workers, and those manual workers with responsibility for other people.   |
| <b>D</b>  | All semi-skilled and unskilled manual workers, and apprentices and trainees to skilled workers.  |
| <b>E</b>  | All those entirely dependant on the state long-term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding six months (otherwise classify on previous occupation). Casual workers and those without regular income |
| <b>F</b>  | Farmers or farm managers of holdings of less or more than 50 acres   |

- In 2010, ***additional prompting was used:***

- ***“Mail”*** was clearly defined as:

***any of the following - standard letters, large letters, packages and parcels whether sent by ordinary post, express or courier. Mail types DO NOT include unaddressed door drops***

- Respondents were also prompted with an actual list of ***other service providers*** rather than referring to them collectively as was the case previously.



**An Post Users** are defined as:

- households that have used **An Post in the past 12 months.**

An Post Users



**Consists of 97% of the sample**

**Other Service Providers** are defined as:

- households that have used **Other Service Providers, other than An Post in the past 12 months.**

Other Service Provider Users



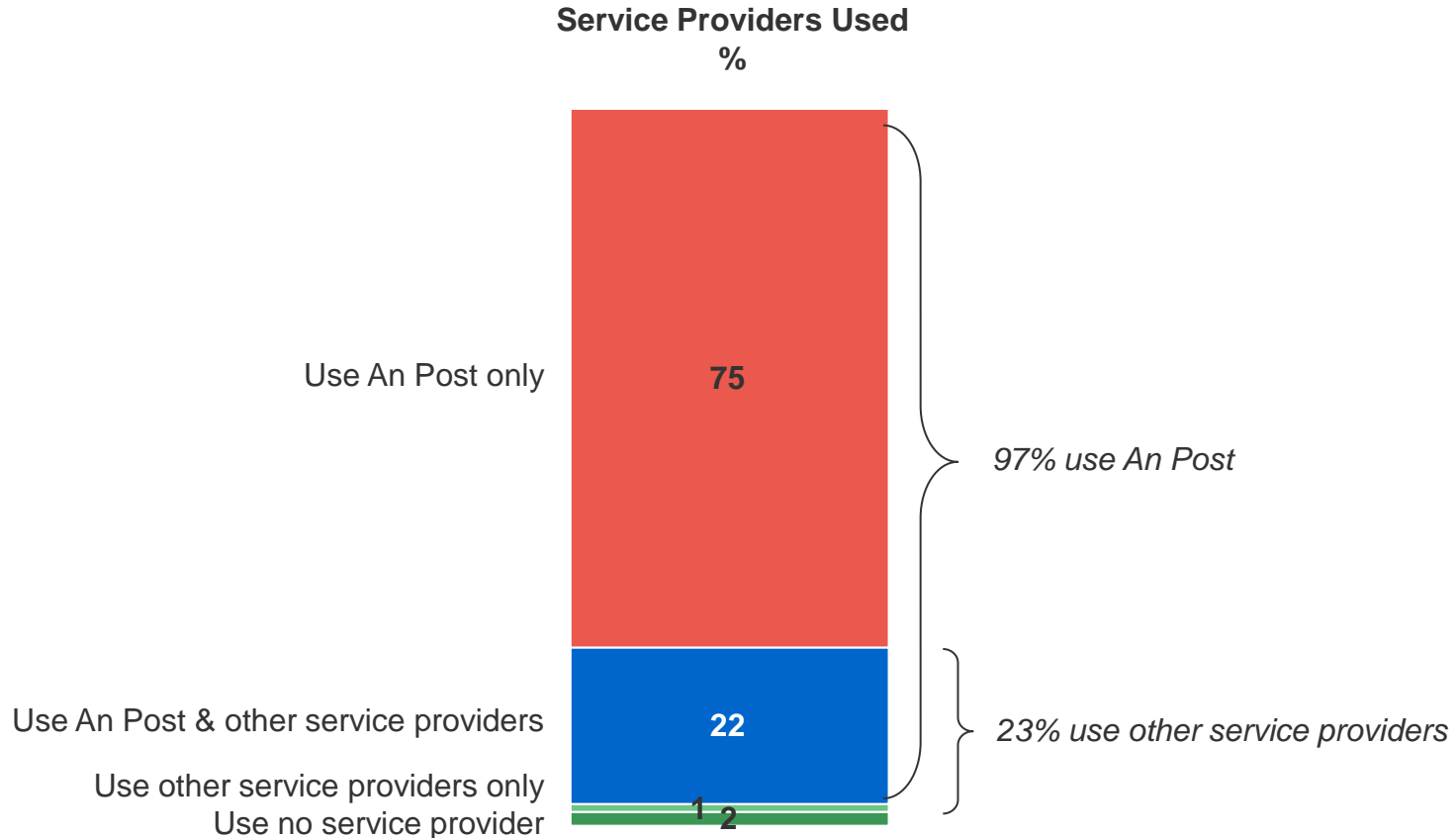
**Consists of 23% of the sample**

# Findings

# Awareness and Usage Of Postal Service Providers

# Service Providers Used - 2010

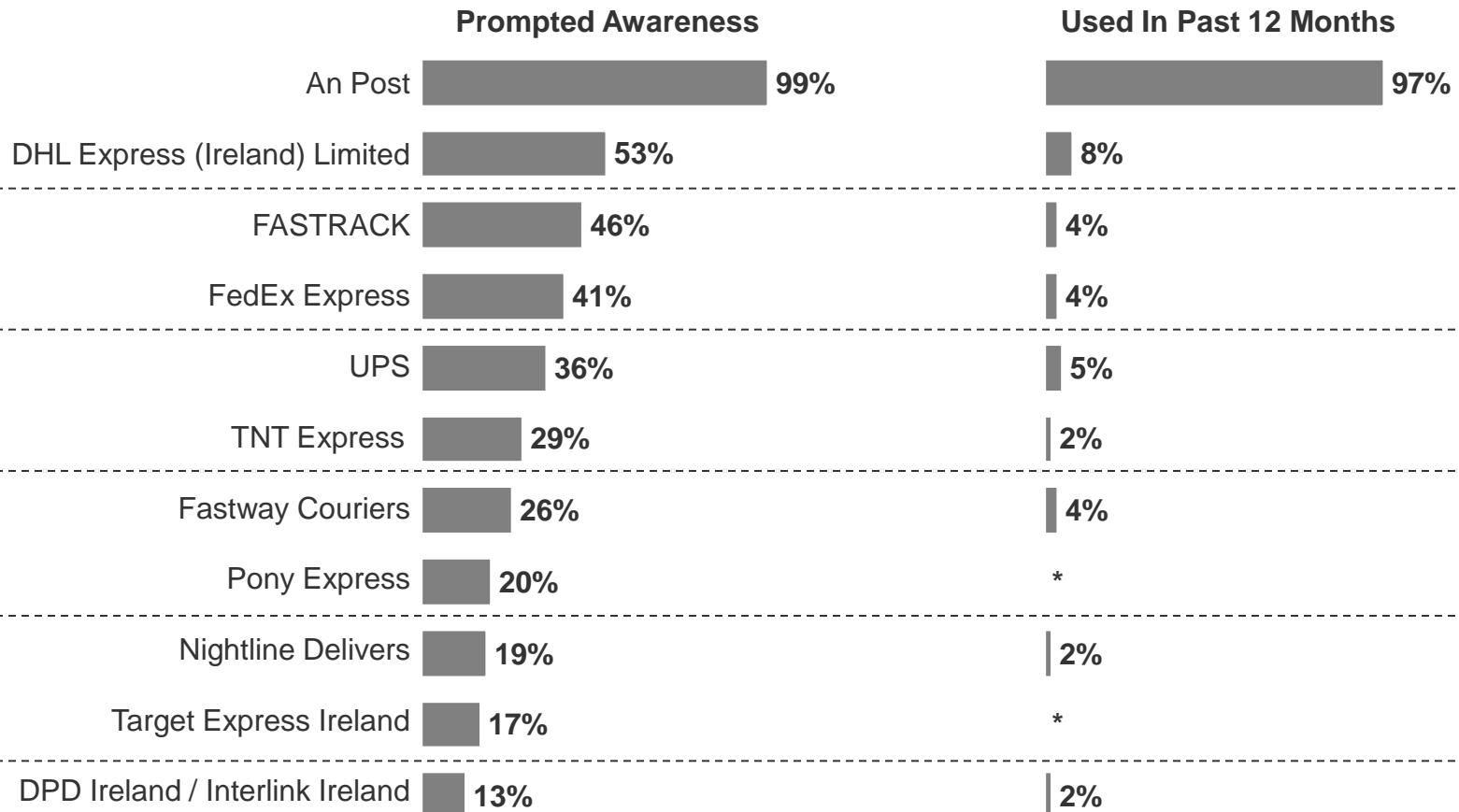
Q.2 Thinking about all mail types, have you or any other person in your household used any of these companies, in the past 12 months?



Three in four (75%) households use An Post only, while just 22% use An Post & other service providers to send mail. Just 1% of households use other service providers only. This may reflect that the majority of households send mail within the area reserved with An Post (letters less than 50g).

# Awareness & Usage Of Companies That Send/Deliver Any Type Of Mail – 2010 Most Well Known

- Q.1** Which of the following companies that send or deliver any types of mail, by ordinary, express or Courier services, have you heard of?
- Q.2** Thinking about all mail types, have you or any other person in your household used any of these companies, in the past 12 months?

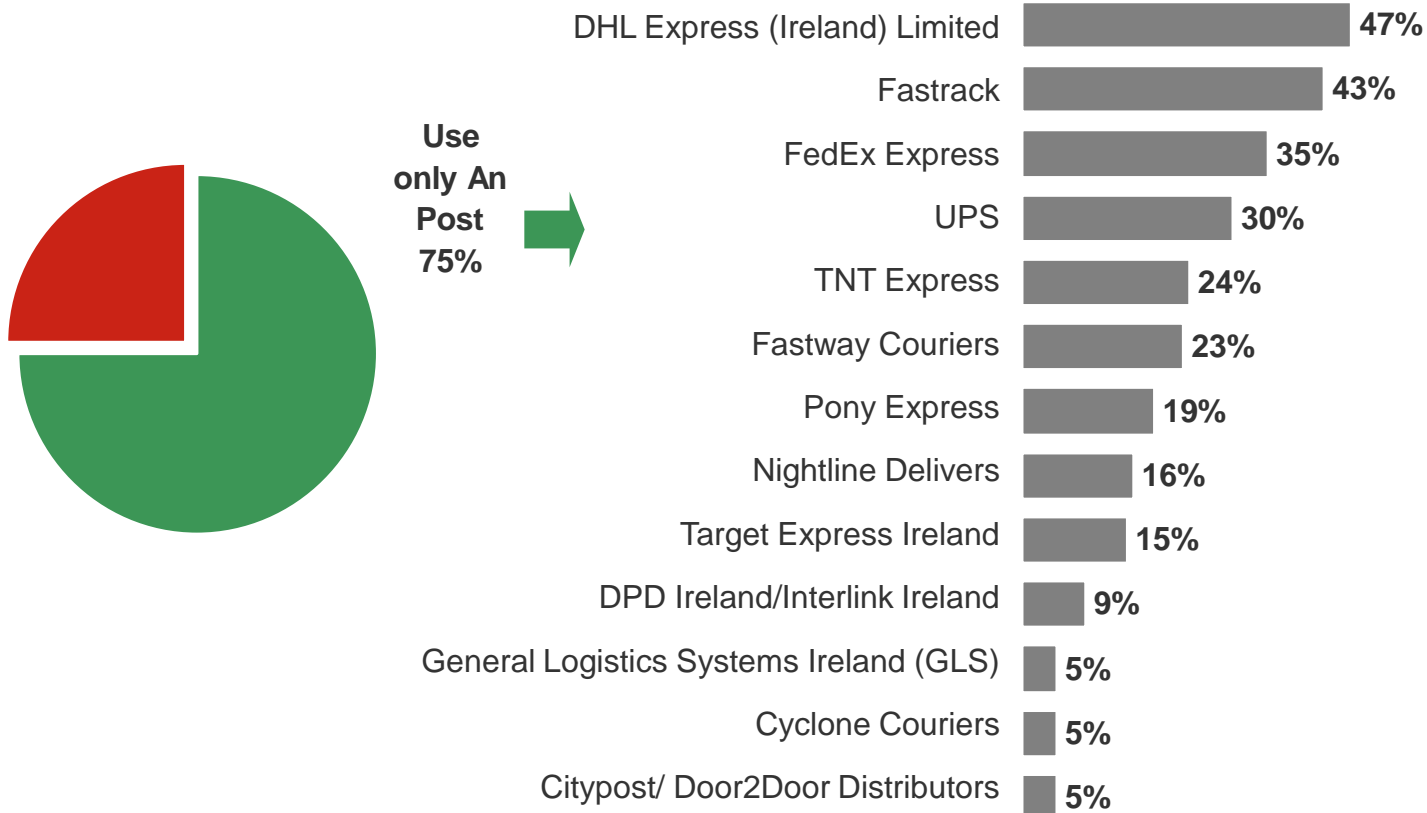


An Post (97%) is used by virtually all households in Ireland. Awareness of other service providers has yet to translate into significant levels of usage amongst residential mail users.

# Awareness of Other Service Providers Among Those Using Only An Post - 2010

Q.1 Which of the following companies that send or deliver any types of mail, by ordinary, express or Courier services, have you heard of?

## Prompted Awareness of Other Service Providers

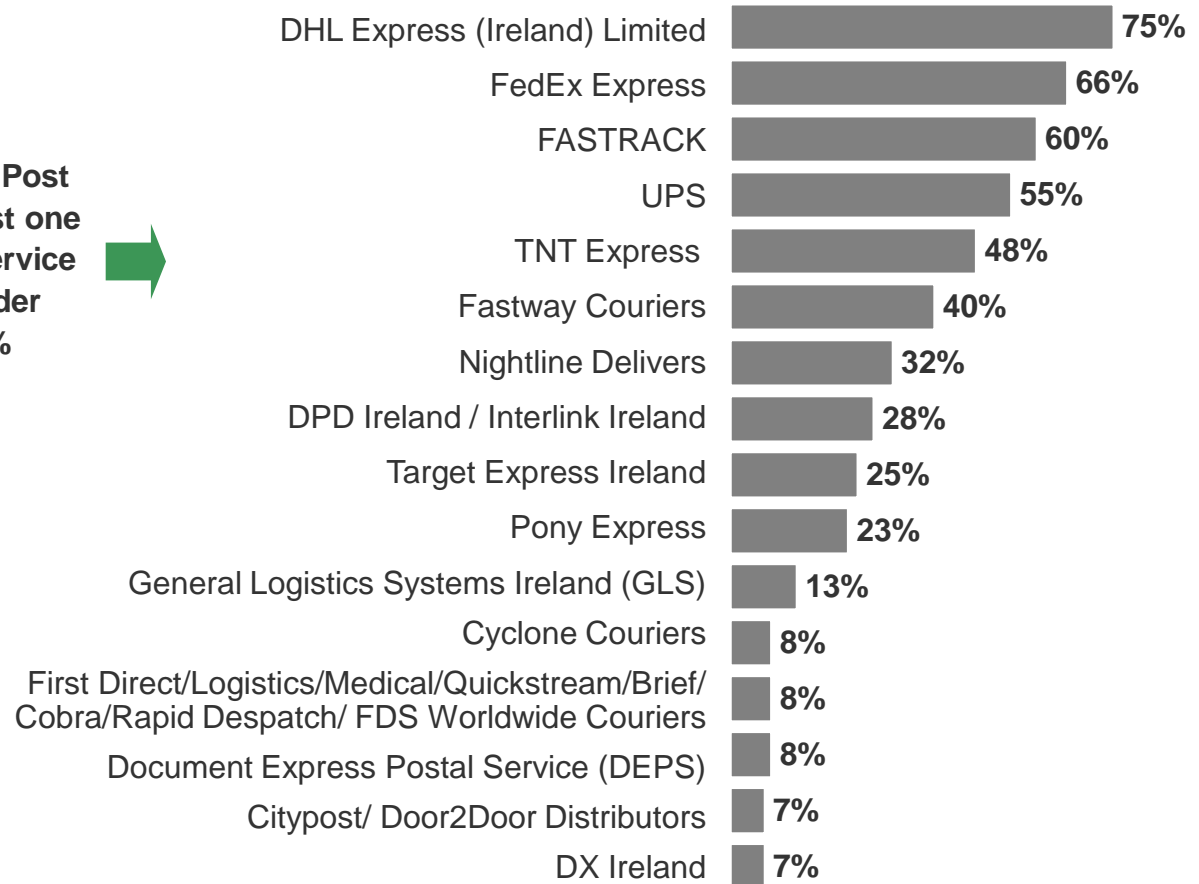
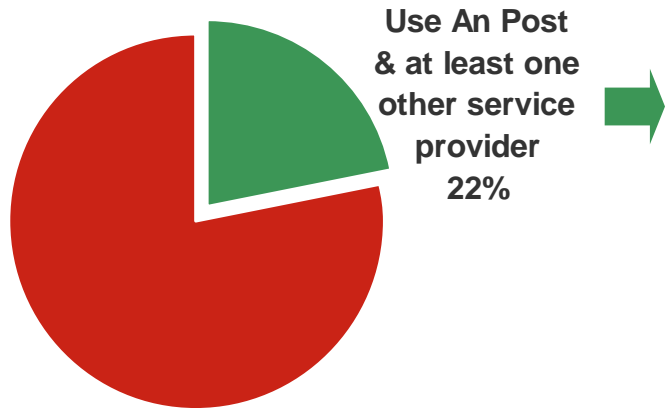


Amongst households only using An Post, awareness of other service providers is slightly lower. Brands such as DHL Express (Ireland) Limited (47%), Fastrack (43%), and FedEx (35%) register the highest levels of awareness.

# Awareness of Other Service Providers - 2010

Q.1 Which of the following companies that send or deliver any types of mail, by ordinary, express or Courier services, have you heard of?

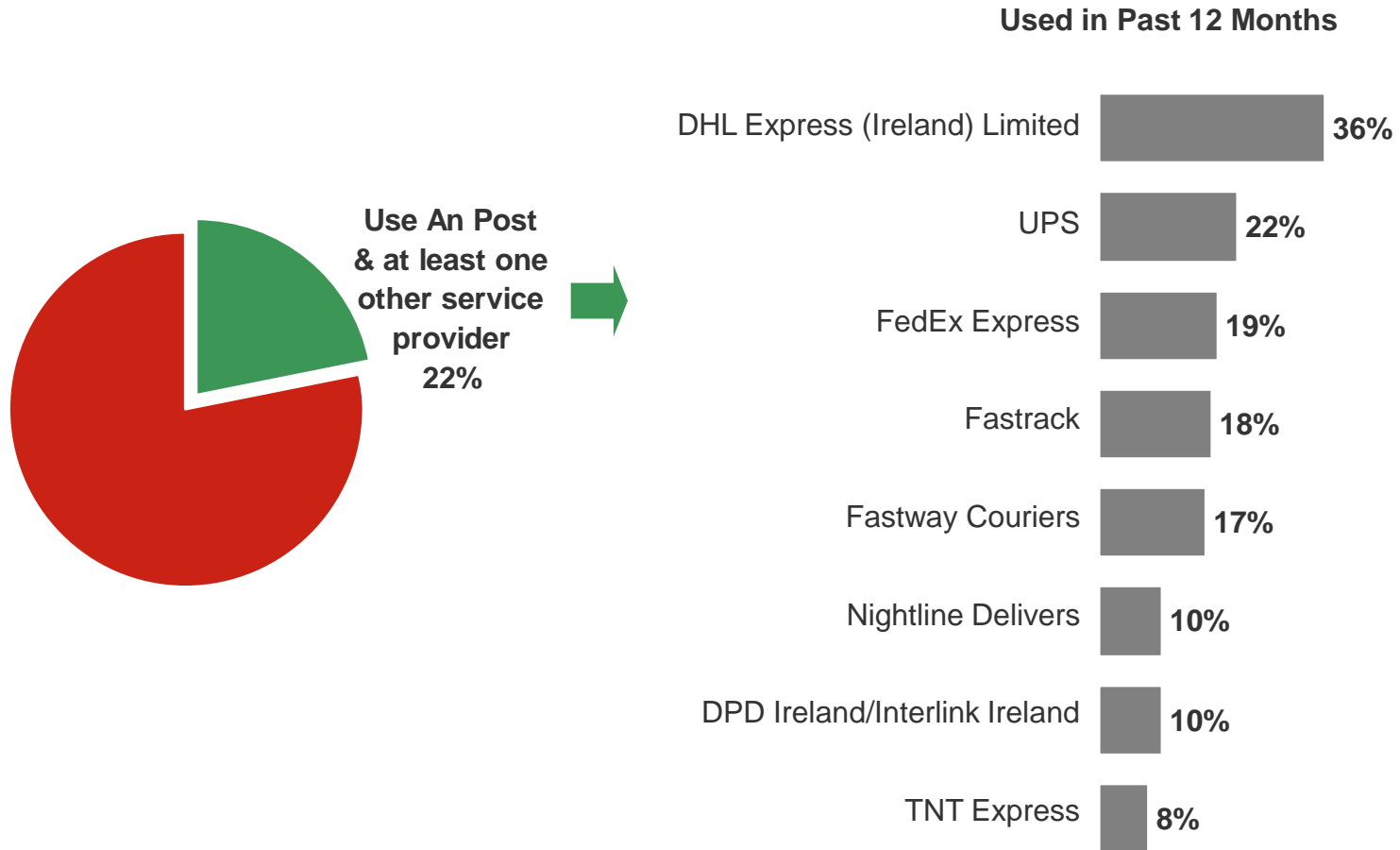
## Prompted Awareness of Other Service Providers



Amongst those using An Post and at least one other service provider, awareness levels for other service providers are naturally higher.

# Other Postal Service Providers Used - 2010

Q.2 Thinking about all mail types, have you or any other person in your household used any of these companies, in the past 12 months?

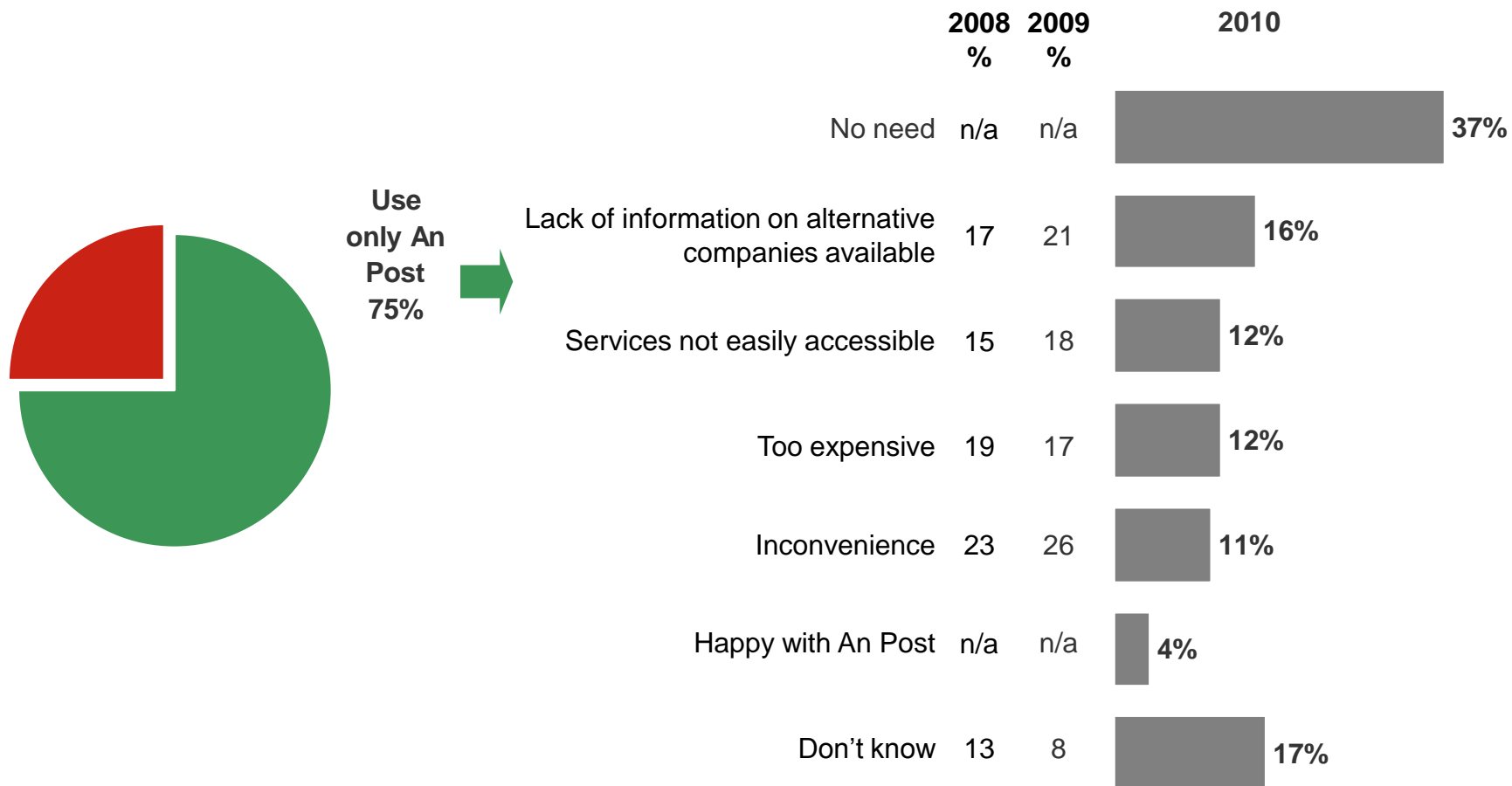


Beyond An Post, DHL are the market leader amongst residential users.



# Reasons For Not Using Other Postal Service Providers

Q.2b What do you think is the main reason for you not using a service provider other than An Post for sending postal items?

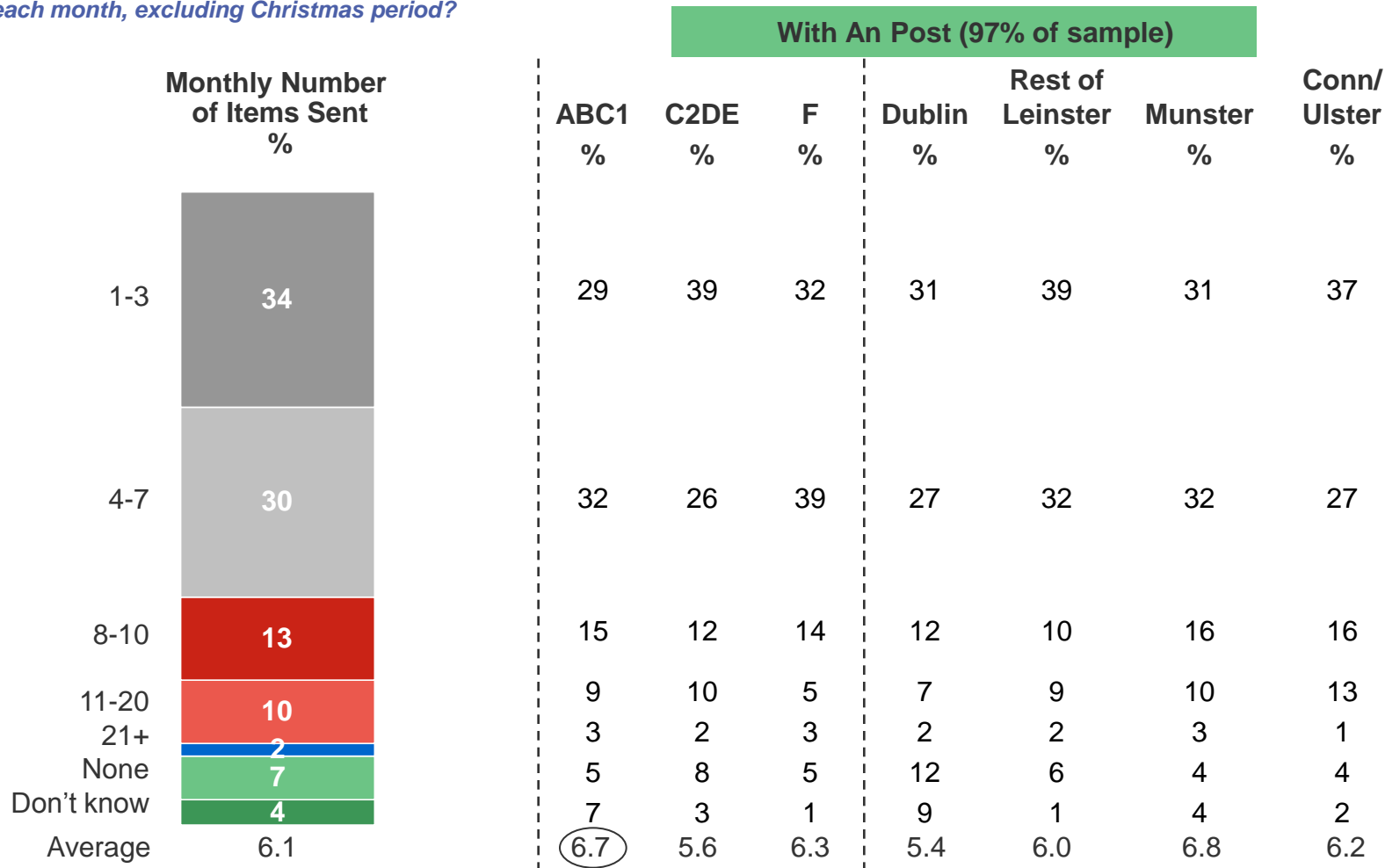


Lack of need is the most cited reason amongst households (37%) for not using other postal service providers. Lack of information available on alternative companies (16%), and lack of accessibility (12%) are also key reasons for not using other providers, suggesting brand awareness does not automatically mean awareness of the range of services offered by other providers or how these services can be accessed. The An Post reserved area may also impact on the use of other service providers.

# Volumes of Mail Sent

# Monthly Number of Mail Items Sent With An Post - 2010

Q.6 What is the TOTAL number of mail items posted with An Post by all persons resident in your household at this address each month, excluding Christmas period?



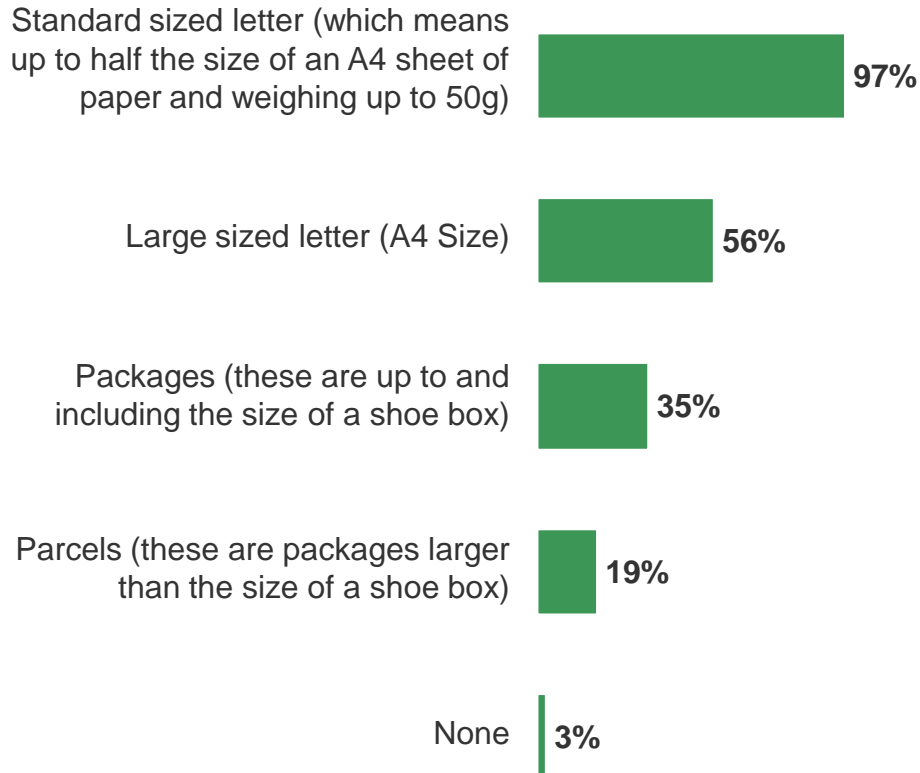
A monthly average of 6.1 is the number of mail items sent with An Post. Middle class households (ABC1's) are heavier senders than other socio-economic groups, an interesting phenomenon bearing in mind penetration of electronic forms of communication (mobile phone/internet) has traditionally been higher amongst this group also.

# Mail Sizes Sent From Households In Past Year - 2010

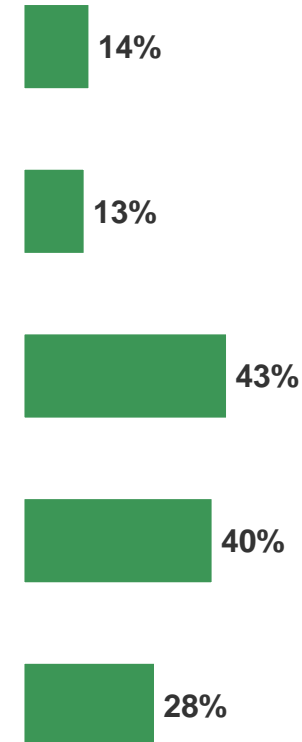
Q.4 In the past 12 months, which of the following mail sizes was sent by all persons resident at your household with An Post?

Q.21 In the past 12 months which of the following mail sizes was sent by all persons resident at your household with postal service providers other than An Post?

## With An Post (97% of sample)



## With Other Service Providers (23% of sample)



An Post currently has a reserved area for letters under 50g and as such it might be expected to emerge as the favoured option for sending standard sized letters (97%). Households that use other service providers tend to use these other providers for sending larger mail items such as packages and parcels.

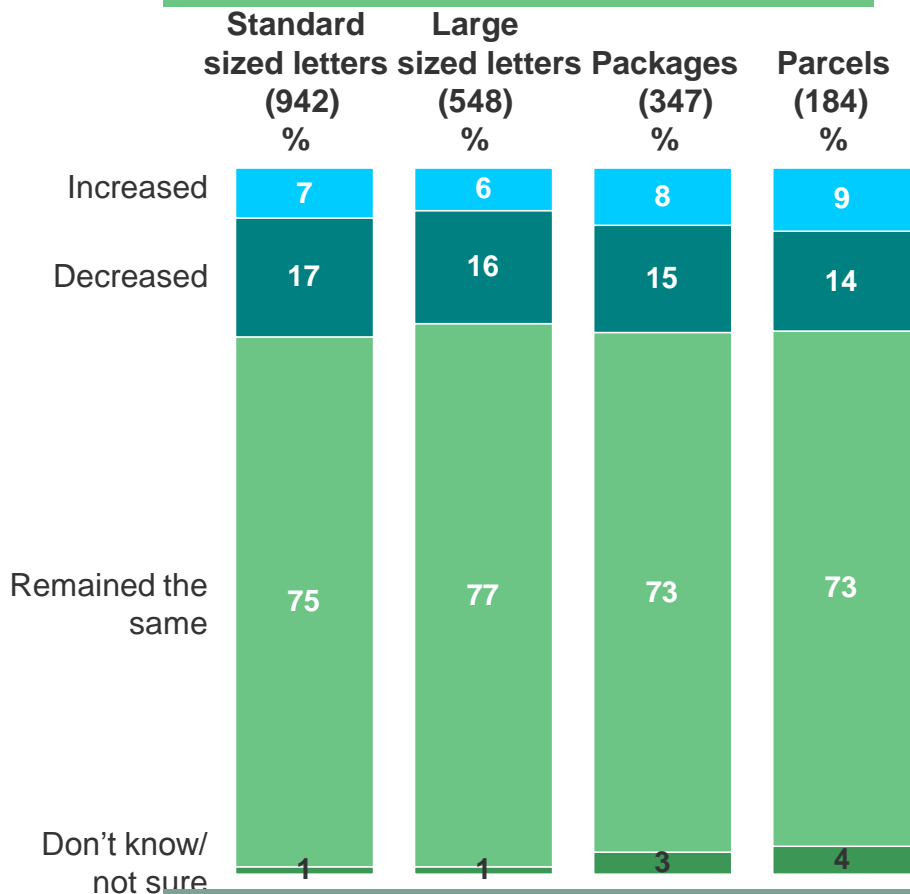
Base: All An Post Users: 972  
All Other Service Providers Users: 238

# Increase/Decrease In Proportion of Mail Sizes Sent In Past Year – 2010

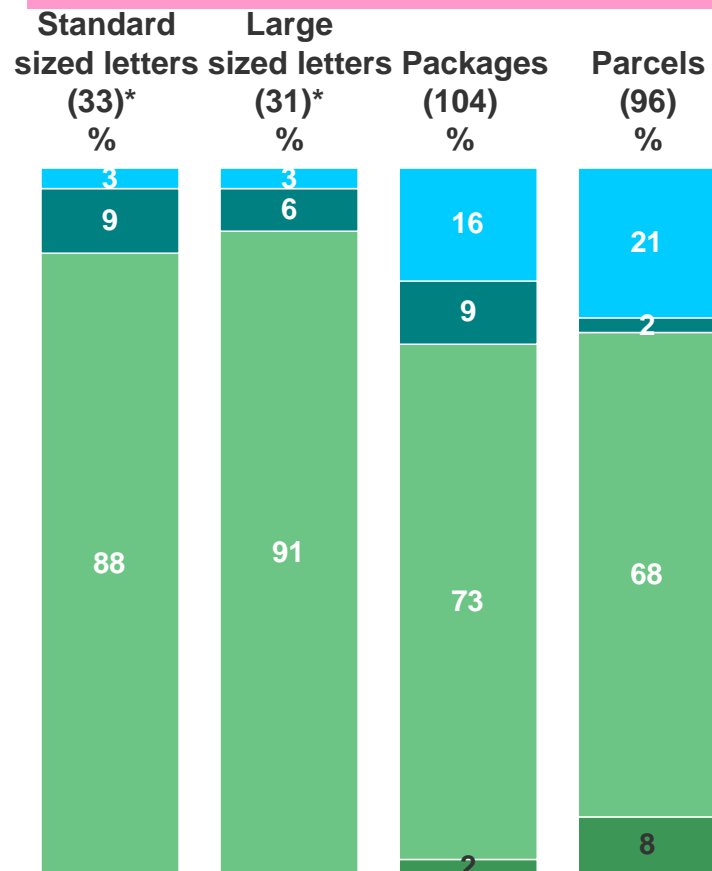
Q.5a Do you think the number of \_\_\_\_\_ (insert each mail size mentioned at Q.4) your household generally sends with An Post in the past 12 months has increased, decreased or remained the same?

Q.22 Do you think the number of (insert each mail size mentioned at Q.21) you send with postal service providers other than An Post in the past 12 months has increased, decreased or remained the same?

## With An Post (97% of sample)



## With Other Service Providers (23% of sample)



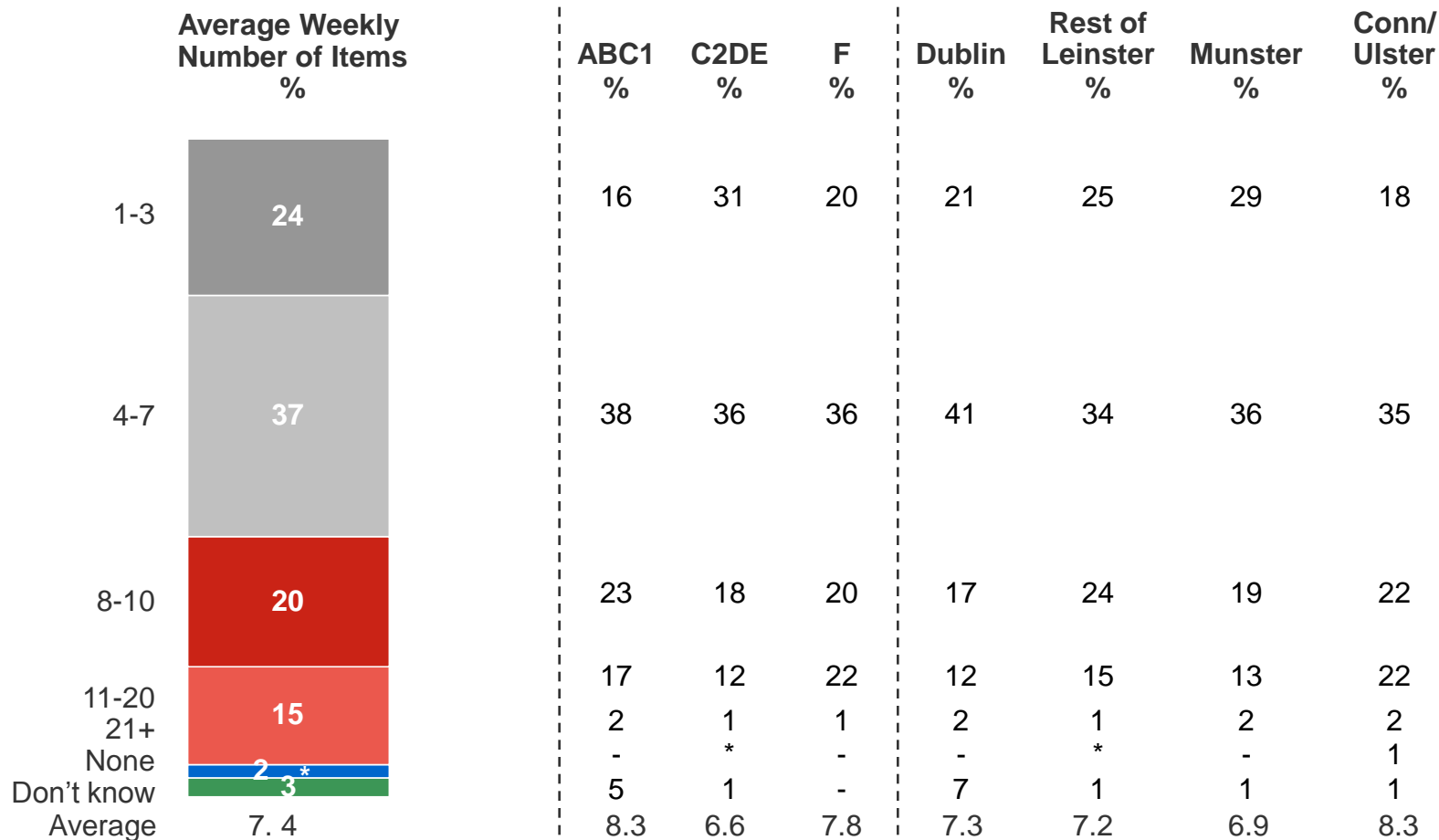
For all mail sizes sent by An Post, the decreased percentage is higher than the increased percentage, suggesting a decrease in mail volumes. While for Other Service Providers, the increased percentage is higher than the decreased percentage for packages and parcels.

# Volumes of Mail Delivered

# Weekly Number of Items Delivered By An Post - 2010

Q.3d Can you tell me the TOTAL number of items of mail delivered to all persons resident in your household at this address each week by An Post, excluding the Christmas period?

## By An Post (97% of sample)

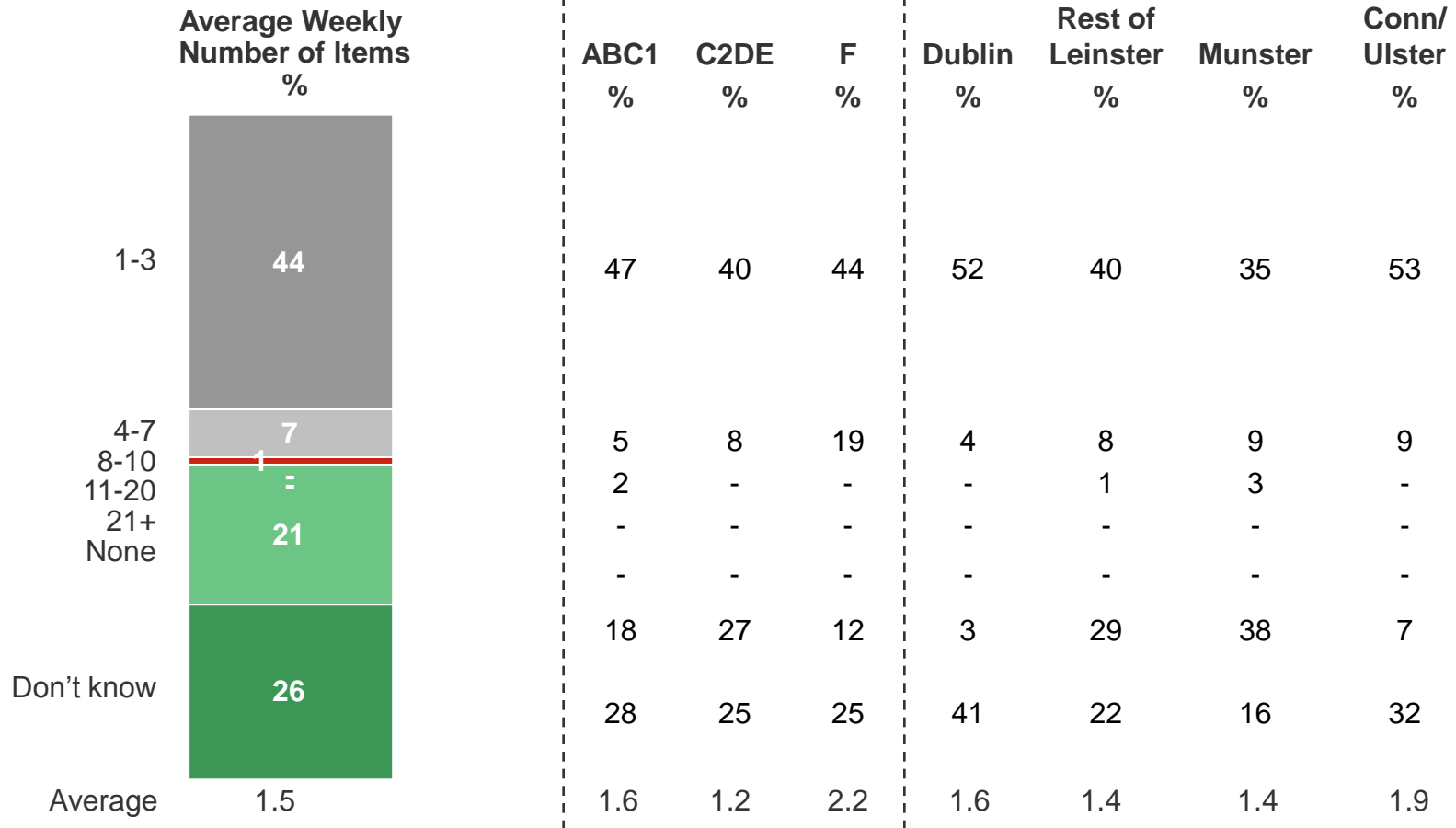


A weekly average of 7.4 would translate into one or two mail items per day on average delivered to each household in Ireland by An Post. With households sending just 6.1 items *per month*, it is clear that most mail items received are from businesses.

# Weekly Number of Items Delivered By Other Service Providers - 2010

Q.20e Can you tell me the TOTAL number of items of mail delivered to all persons resident in your household at this address each week by Postal Service Providers other than An Post, excluding the Christmas period?

## By Other Service Providers (23% of sample)



It would seem that only a handful of households received mail items on a daily basis from other service providers, which is not surprising as other service providers are used mainly for delivery of parcels and packages, which attract lower volumes than letter post.

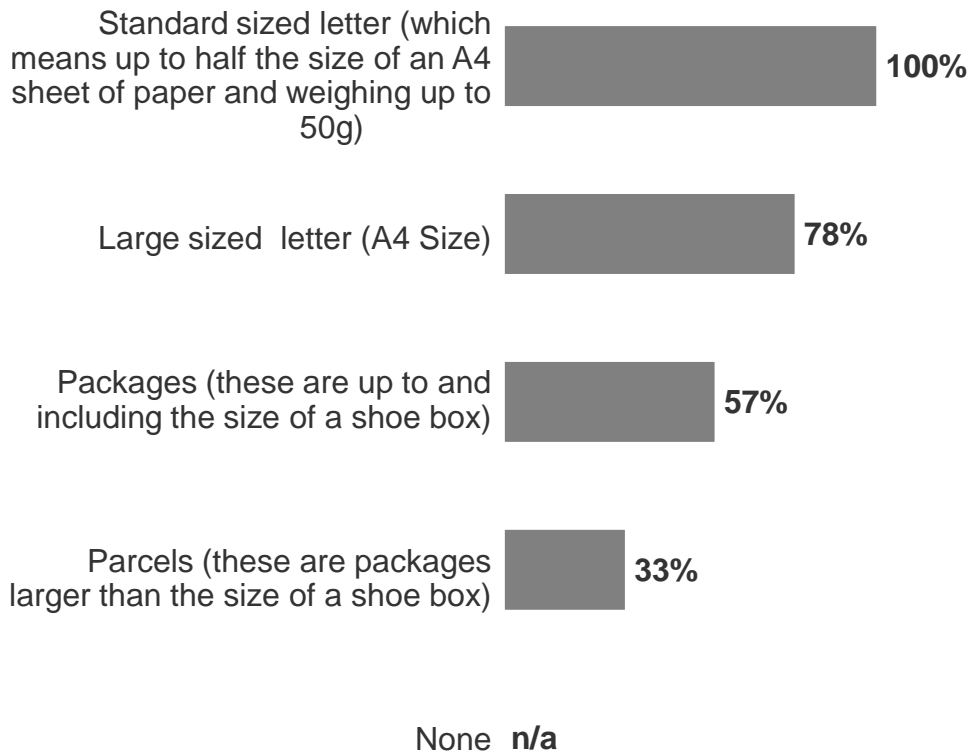


# Mail Sizes Delivered To Households In Past Year - 2010

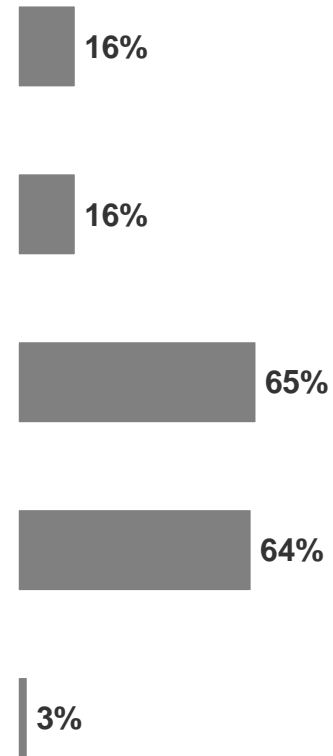
**Q.3a** In the past 12 months, which of the following mail sizes were delivered to all persons resident in your household, at this address, by An Post?

**Q.20b** In the past 12 months, which of the following mail sizes were delivered to all persons resident in your household, at this address, by all postal service providers other than An Post?

## By An Post (97% of sample)



## By Other Service Providers (23% of sample)

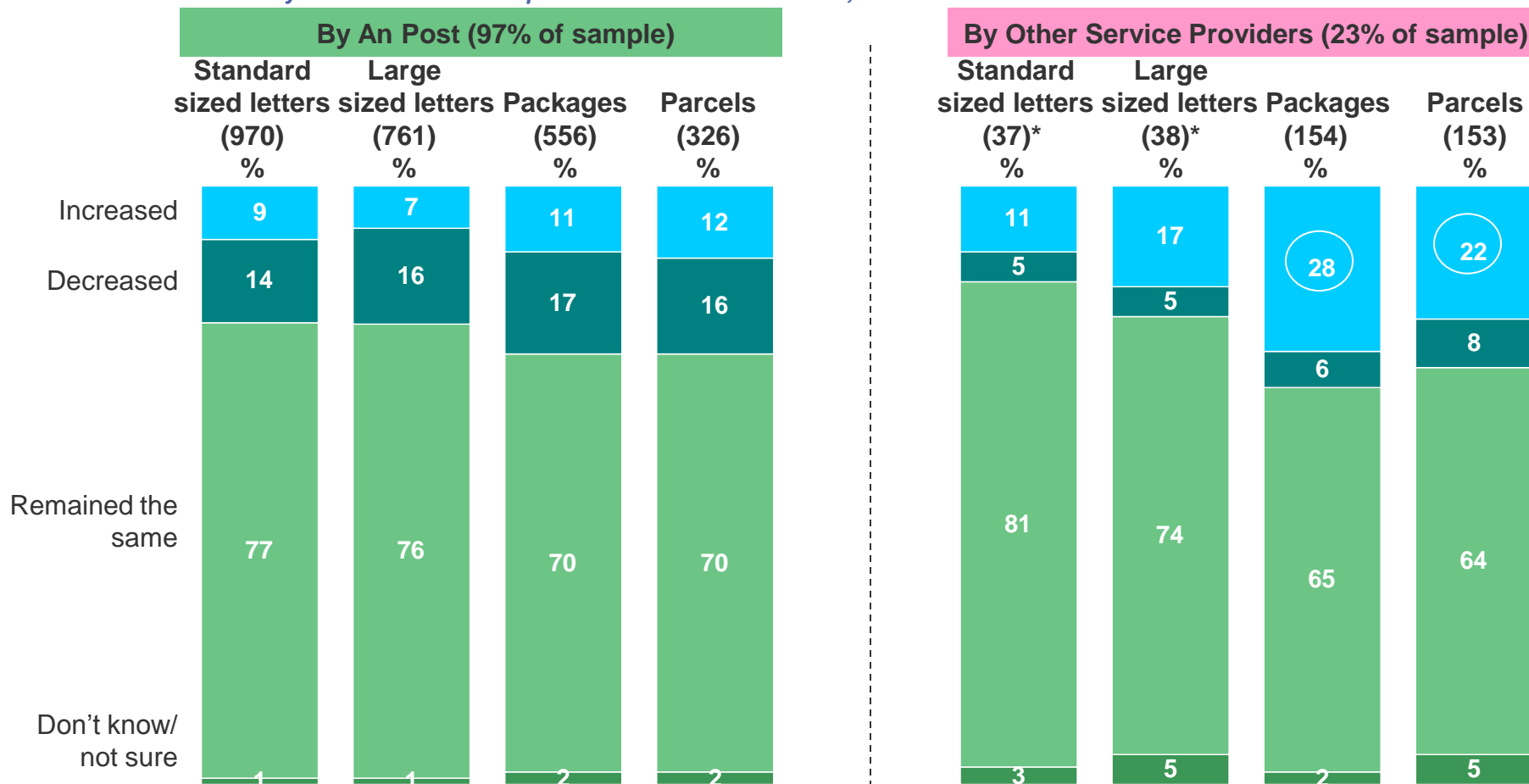


Similar to mail items sent, An Post is mainly used to deliver standard and large letters, while for those using other service providers, it is mainly for packages and parcels.

# Increase/Decrease In Proportion of Mail Sizes Delivered In Past Year - 2010

Q.3b Do you think the number of \_\_\_\_\_ (insert each mail size mentioned at Q.3a) that An Post delivered to your household in the past 12 months has increased, decreased or remained the same?

Q.20c Do you think the number of \_\_\_\_\_ (insert each mail size mentioned at Q.20b) that postal service providers other than An Post deliver to your household in the past 12 months has increased, decreased or remained the same?



For all mail sizes delivered by An Post, the decreased percentage is higher than the increased percentage. For all mail sizes delivered by Other Service Providers, particularly packages and parcels the increased percentage is higher than the decreased percentage.



Base: All who have had standard letters/large letters/packages/parcels delivered by An Post/Other Service Providers

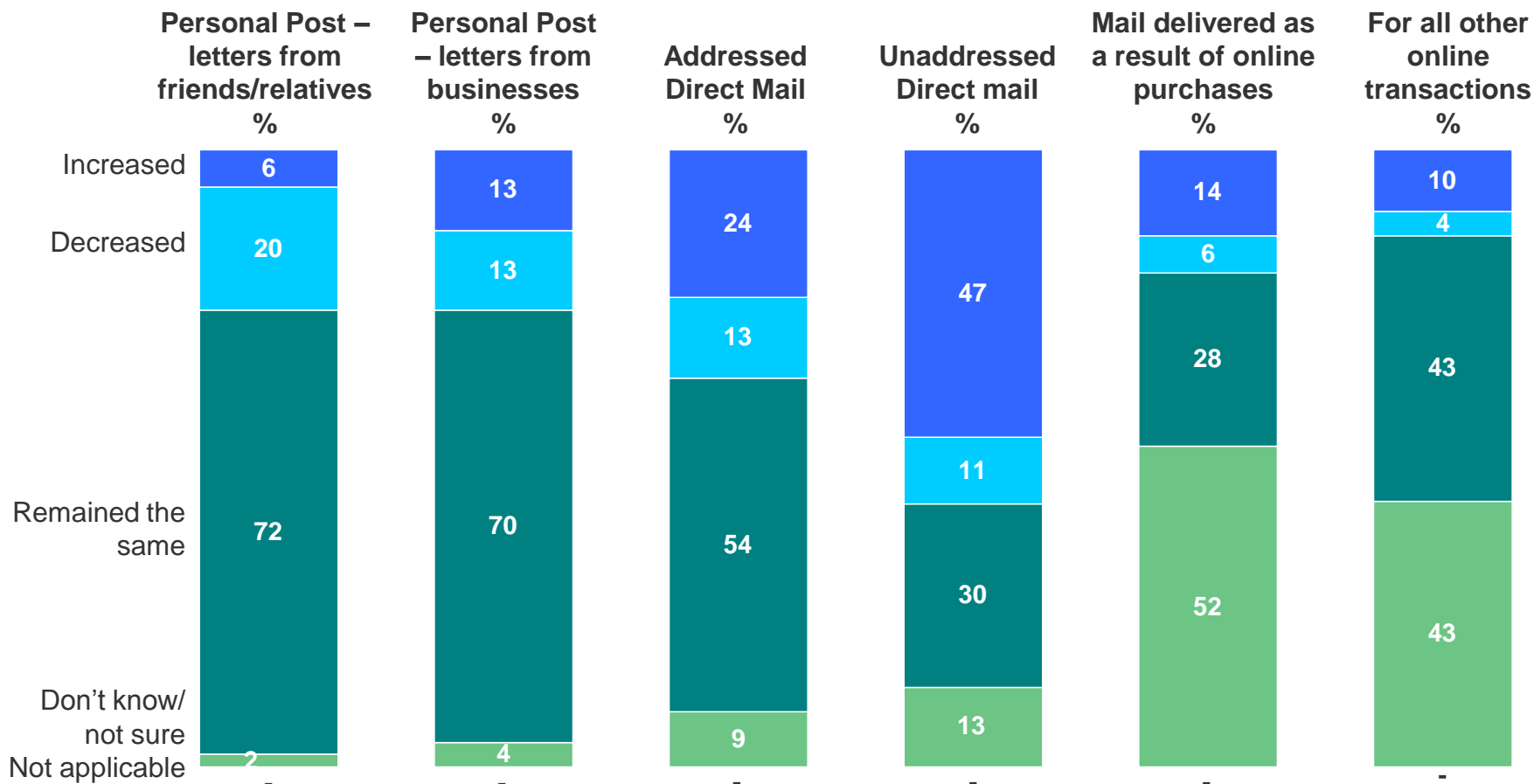
Ipsos MRBI

Caution: small base size

# Quantity & Types of Mail Delivered By An Post – 2010

By An Post (97% of sample)

Q.3c For each of the mail types that I am going to read out, can you tell me if the total number of mail items delivered to all persons resident in your household, at this address from An Post has increased, decreased or remained the same over the past twelve months?

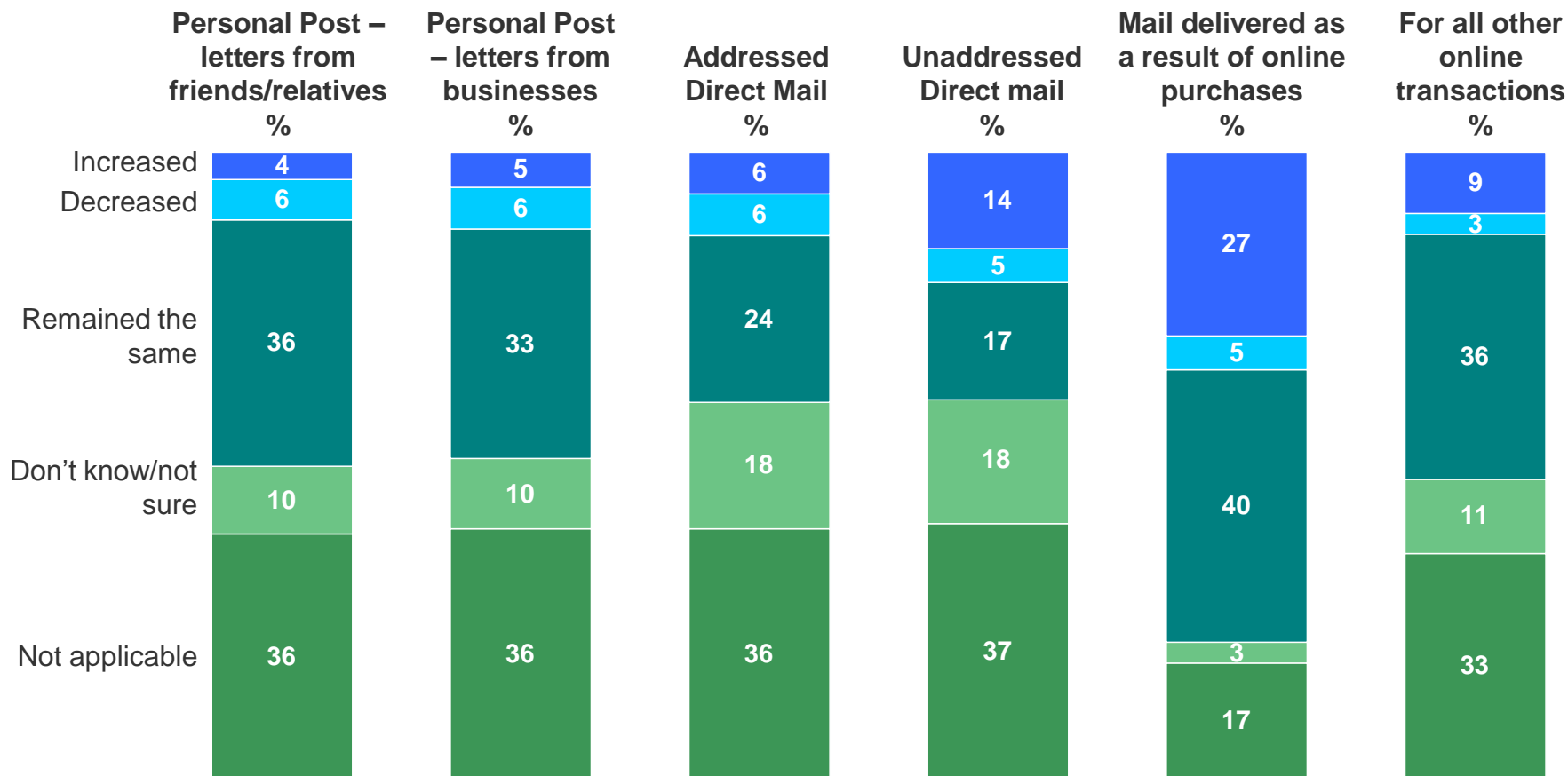


Personal post appears to be declining, being replaced by direct marketing activities and the fruits of online shopping behaviours. Note respondents may not be aware of who delivers unaddressed items.

# Quantity & Types of Mail Delivered By Other Service Providers – 2010

By Other Service Providers  
(23% of sample)

Q.20d For each of the mail types that I am going to read out, can you tell me if the total number of mail items delivered to all persons resident in your household, at this address from postal service providers other than An Post has increased, decreased or remained the same over the past twelve months?

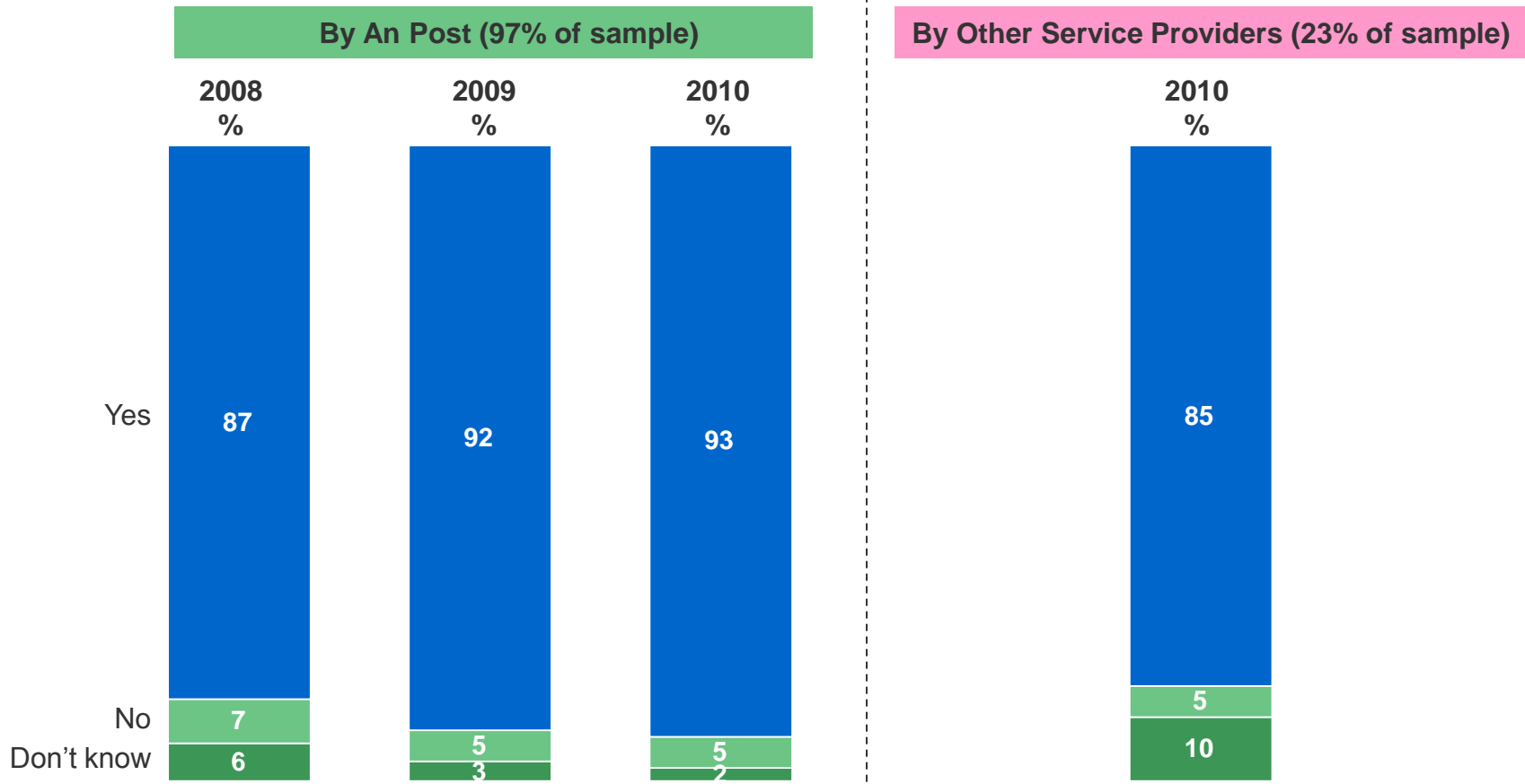


Delivery by other service providers stand apart from An Post most noticeably in relation to mail delivered as a result of online purchases. Note respondents may not be aware of who delivers unaddressed items.

# Attitudes To The Postal Service

# Satisfaction With Availability Of Information Provided By An Post/Other Service Providers

- Q.7 Are you satisfied with the availability of information provided by An Post on the postal service products which you can use for sending your mail?
- Q.25 Are you satisfied with the availability of information provided by<INSERT SERVICE PROVIDER> on the postal service products which you can use for sending your mail?



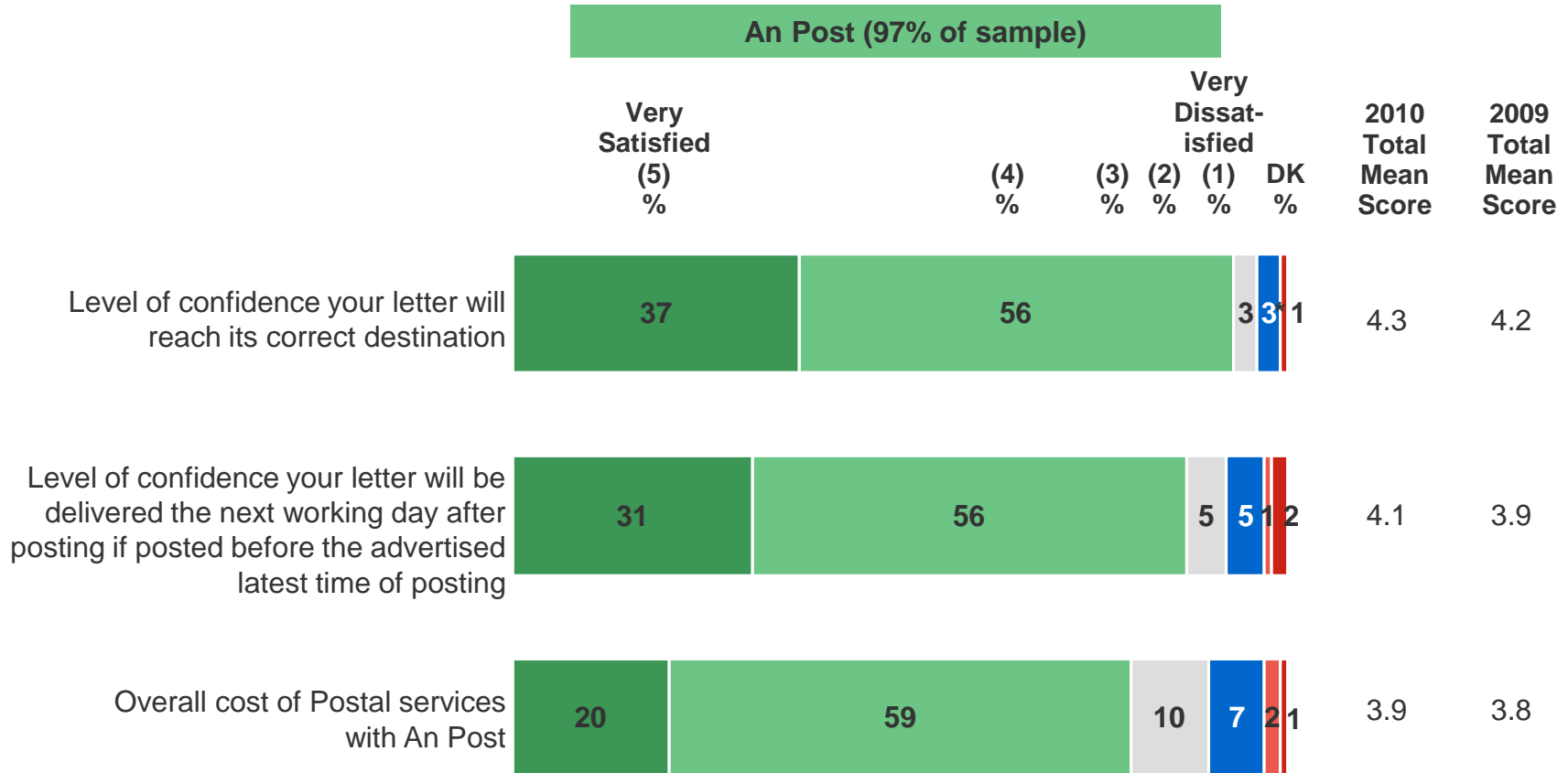
Similar to 2009 scores, 93% of households claim that they are satisfied with the availability of information provided by An Post. Those using other service providers are slightly less satisfied with the availability of information provided by other service providers, who may not have the network strength or depth of presence in the market that An Post has.

Base: All An Post Users: 972  
All Other Service Providers Users: 238



# Satisfaction with An Post Services

**Q.9** I am going to read out a list of aspects related specifically to An Post. For each one, please tell me if you are satisfied or dissatisfied with each aspect on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

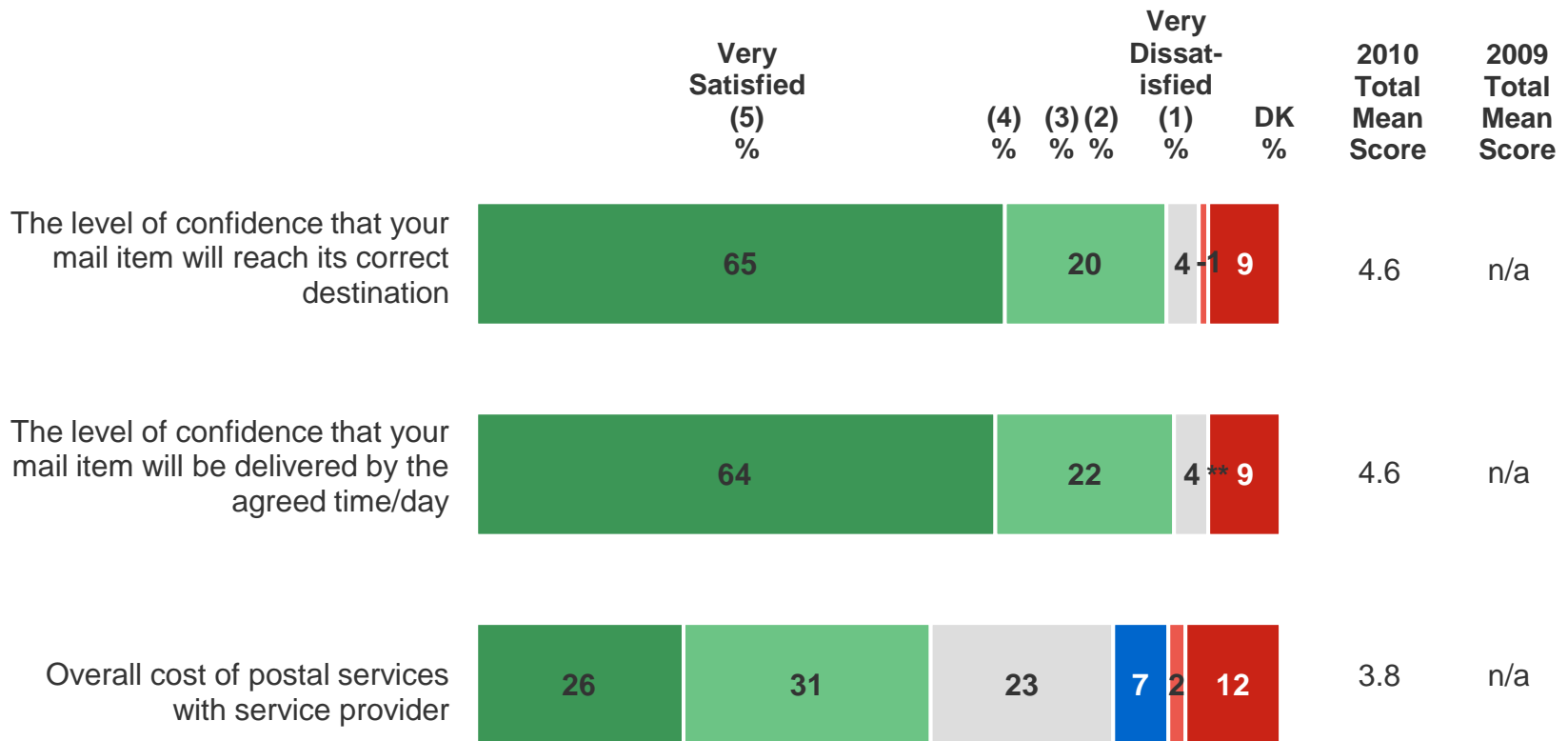


In 2010, an increase in satisfaction with An Post is recorded across all three performance attributes. More than 9 in 10 (93%) An Post users are confident that their letter will reach its correct destination. This falls to 87% with regard to confidence that their letter will be delivered the next working day after posting, if posted before the advertised latest time of posting.

# Satisfaction with Other Service Providers

**Q.27** I am going to read out a list of aspects related specifically to <INSERT SERVICE PROVIDER> For each one please tell me if you are satisfied or dissatisfied with each aspect on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

## By Other Service Providers (23% of sample)



Users of other service providers register high satisfaction scores for the level of confidence that your mail item will reach its correct destination (85%) and the level of confidence that your mail item will be delivered by the agreed time / day (86%). Users are less likely to be satisfied with the overall cost of other postal service providers (57%), perhaps reflecting the more expensive nature of other items sent by other service providers (parcels & packages).



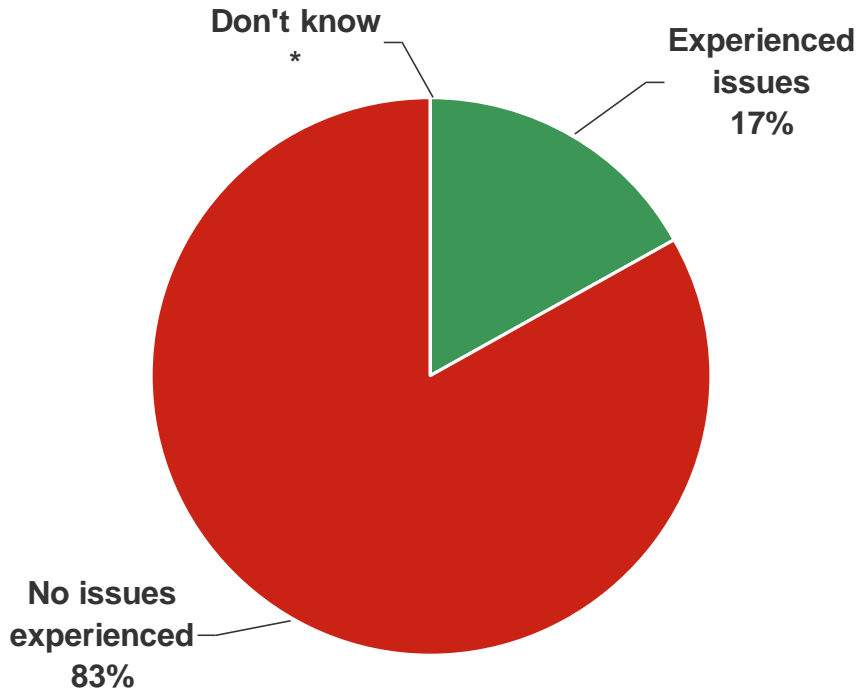
# Complaints Experience

# Any Issues In Past Year

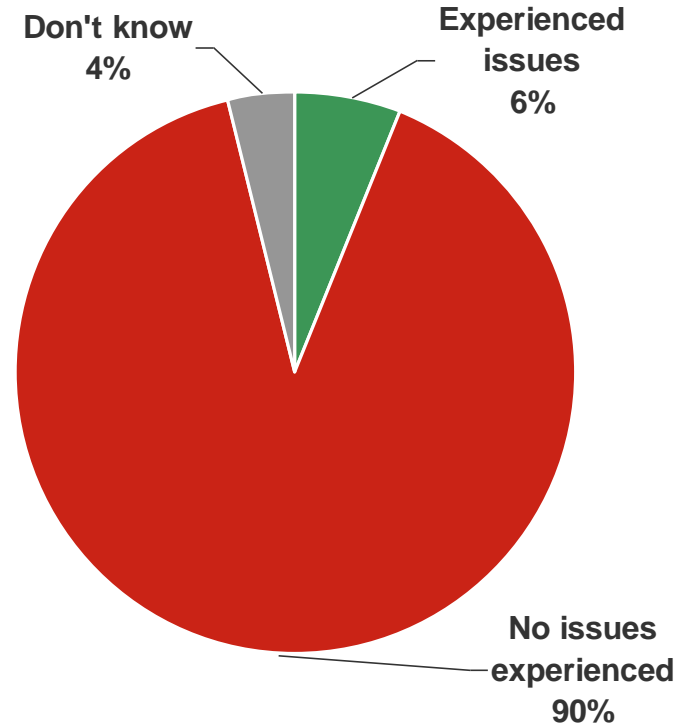
Q.12 In the past 12 months did you experience any of the following issues with the service provided by An Post?

Q.30 In the past 12 months did you experience any of the following issues with the service provided by <INSERT SERVICE PROVIDER>?

### Any Issues With An Post



### Any Issues With Other Service Provider

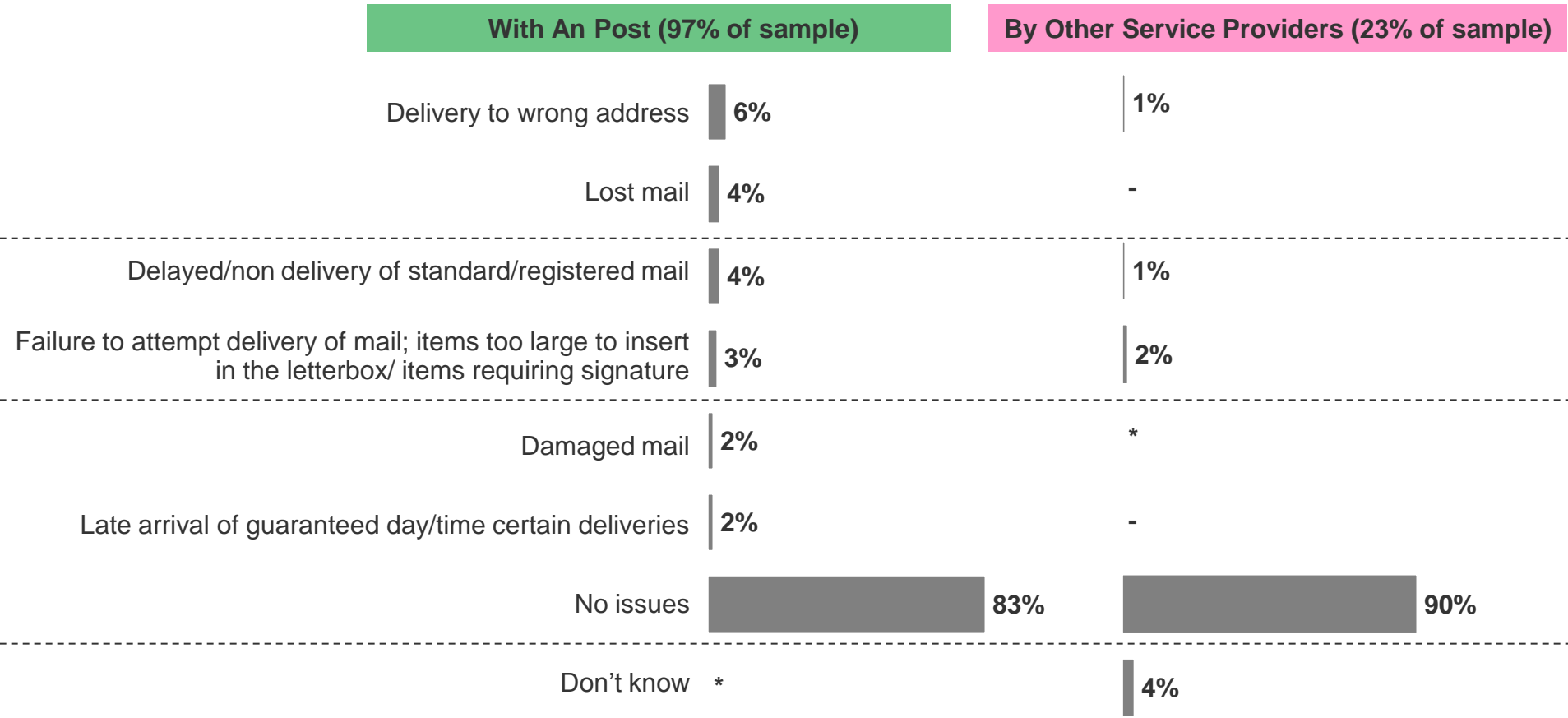


One in six (17%) An Post users experienced any issues in the past 12 months; for other service providers just 6% experienced issues.

# Type of Issues Experienced In Past Year - 2010

Q.12 In the past 12 months did you experience any of the following issues with the service provided by An Post?

Q.30 In the past 12 months did you experience any of the following issues with the service provided by <INSERT SERVICE PROVIDER>?

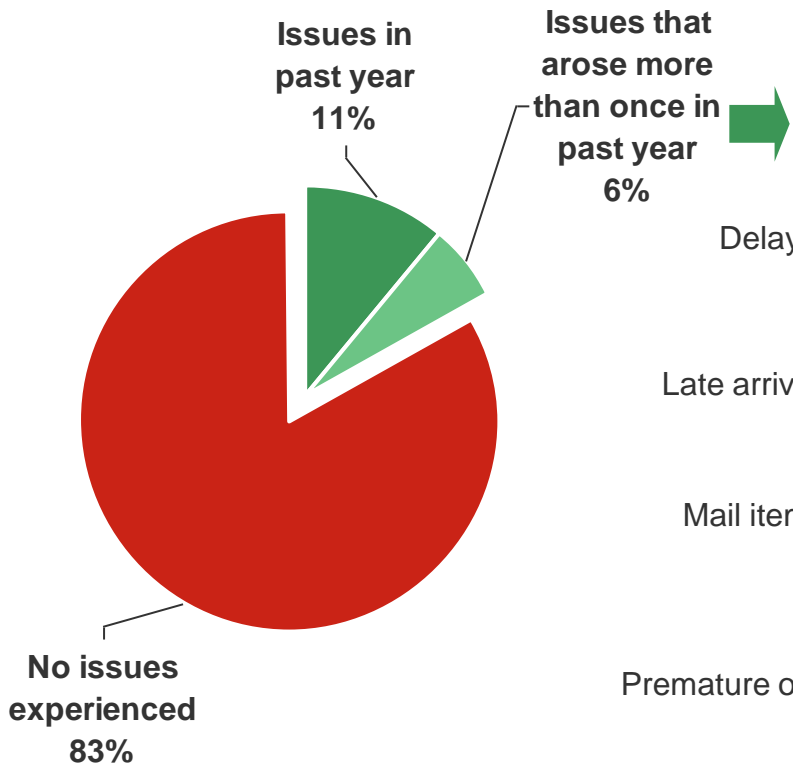


Mentions <2% not shown

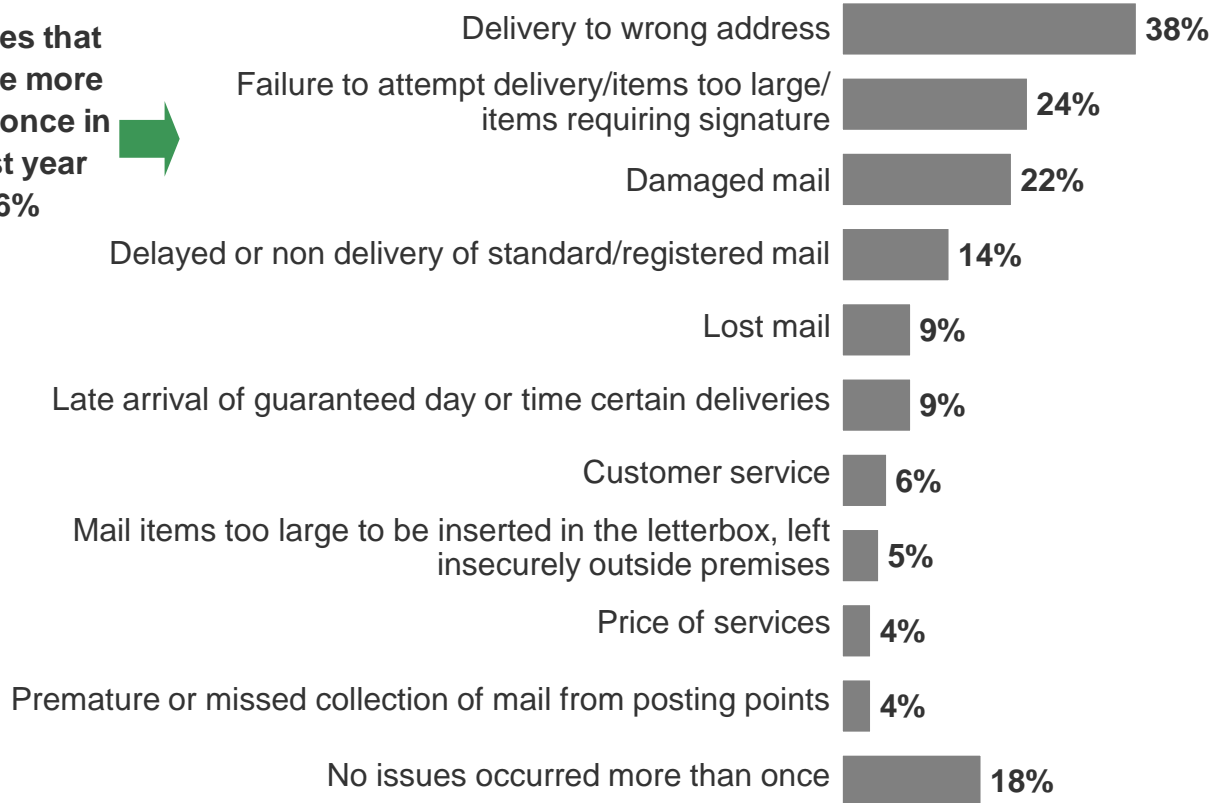
The majority of households did not experience any issues with An Post/other service providers in the past year. Of those using An Post, delivery to wrong address (6%), lost mail (4%) or delayed/non delivery of standard registered mail (4%) emerged as the most frequently mentioned issues. Of those using other service providers, failure to attempt delivery of mail; items too large to insert in the letterbox/items requiring signature (2%) is the most commonly mentioned issue.

# Issues That Arose More Than Once In Past Year With An Post - 2010

Q.13 And which of these issues occurred more than once?



## Issues Arising More Than Once With An Post



Of those using An Post, the main issues that arose more than once were delivery to wrong address (38%), failure to attempt delivery/ items too large/ items requiring signature (24%) and damaged mail (14%).

# Issues That Arose More Than Once With An Post – 2010

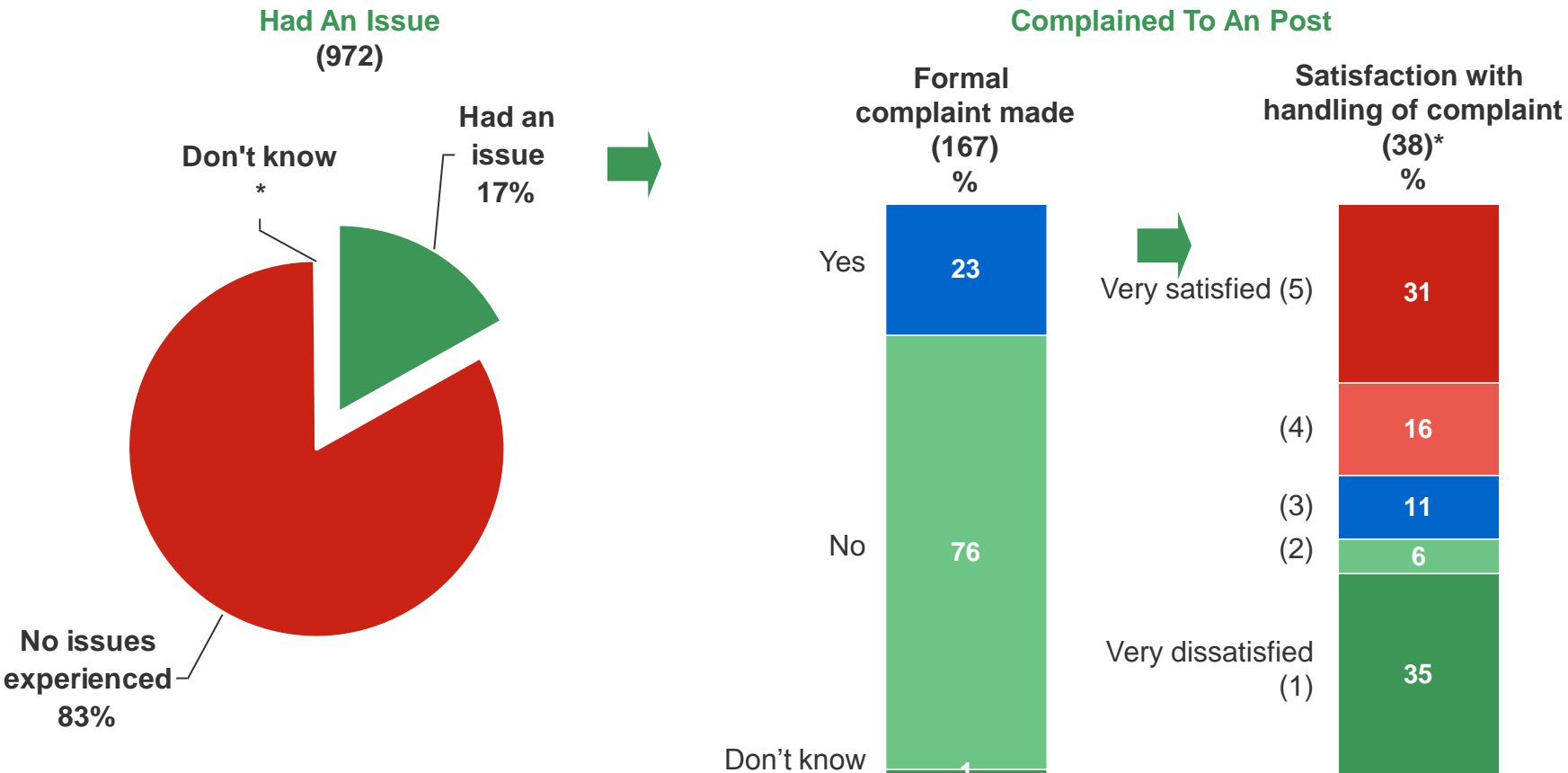
Q.13 And which of these issues occurred more than once?

	An Post			
	An Post Total (55)	Sender (8)*	Receiver (38)*	Both (7)*
	%	%	%	%
Delivery to wrong address	38	-	51	29
Failure to attempt delivery; items too large / items requiring signature	24	-	29	29
Damaged mail	22	11	26	14
Delayed/non delivery of standard/ registered mail	14	24	10	28
Lost mail	9	13	3	42
Late arrival of guaranteed day or time certain deliveries	9	11	11	-
Customer service	6	13	3	-
Mail items too large to be inserted in the letterbox, left insecurely outside premises	5	-	7	-
Price of services	4	13	3	-
Premature or missed collection of mail from posting points	4	11	3	-
No issues occurred more than once	18	-	23	15

For An Post senders, delayed or non-delivery of standard /registered mail is the main re-occurring issue, whereas for An Post receivers, delivery to wrong address is the main issue that arose more than once.

# Complaints – An Post - 2010

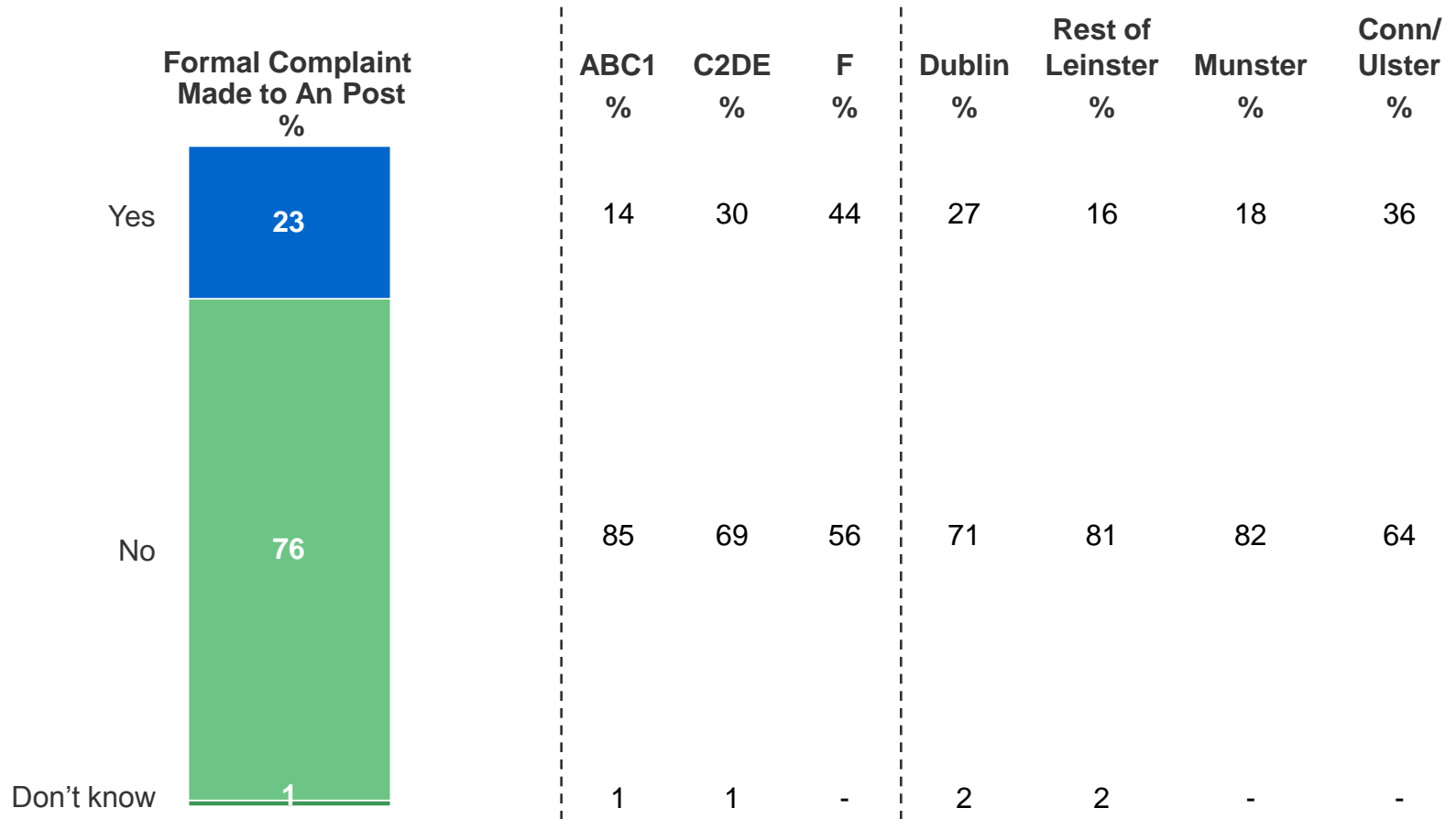
Q.15 Did you lodge/make a formal complaint about any of these issues?  
 Q.18 How satisfied were you with the handling of your complaint by An Post using a scale of 1 to 5 where (1) is very dissatisfied and (5) is very satisfied?



Nearly one in four (23%) made a formal complaint in the past year. A significant 41% were dissatisfied with the handling of the complaint.

# Incidence of Making A Formal Complaint - 2010

Q.15 Did you lodge/make a formal complaint about any of these issues?

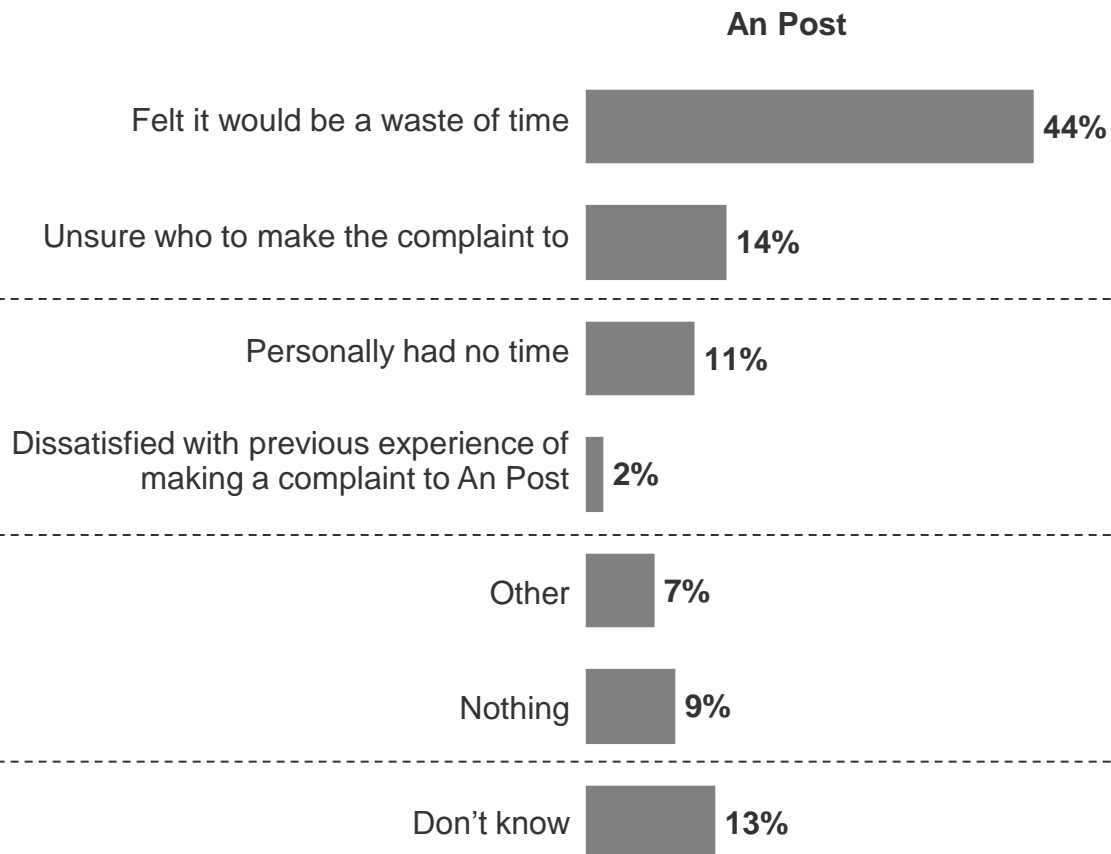


F's and those living in Conn/Ulster (more rural dwellers) are more likely to have made a formal complaint to An Post.

# Main Reason For Not Making A Formal Complaint To An Post - 2010

Q.16 What would you feel was the main factor in deterring you from making a formal complaint to An Post?

Q.34 What would you feel was the main factor in deterring you from making a formal complaint to<INSERT SERVICE PROVIDER>?

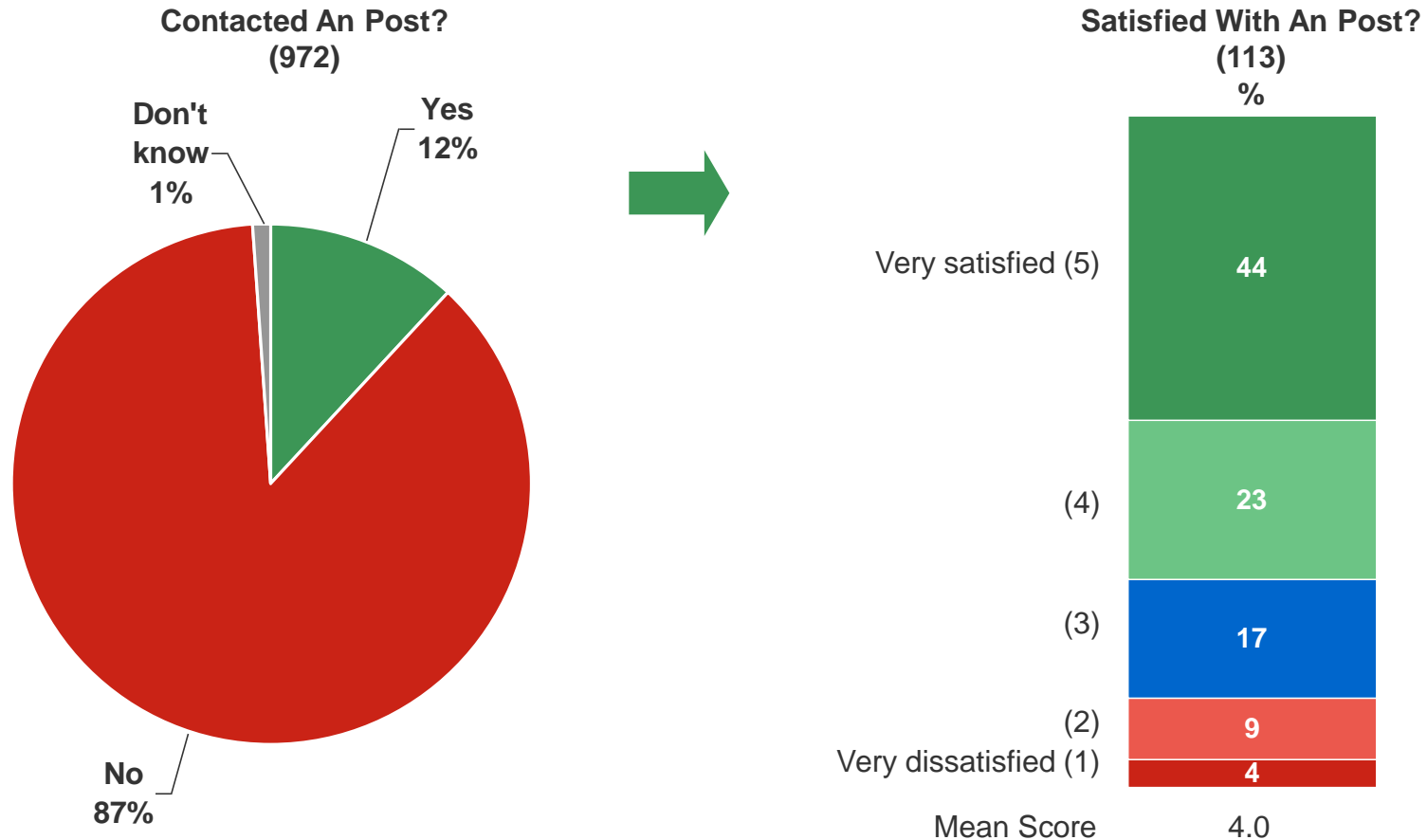


The number one reason for not making a formal complaint to An Post was that it was “felt it would be a waste of time”, which presents an opportunity for An Post to build more awareness and confidence in its complaints procedures.



# Contacted An Post In Past 12 Months & Satisfaction With Customer Service - 2010

- Q.10 In the past 12 months, have you ever contacted An Post by telephone / email / face to face etc with regard to its postal service product offerings?
- Q.11 And how would you rate your satisfaction with the standard of customer service you received with An Post using a scale of 1 to 5 where (1) is very dissatisfied and (5) is very satisfied?

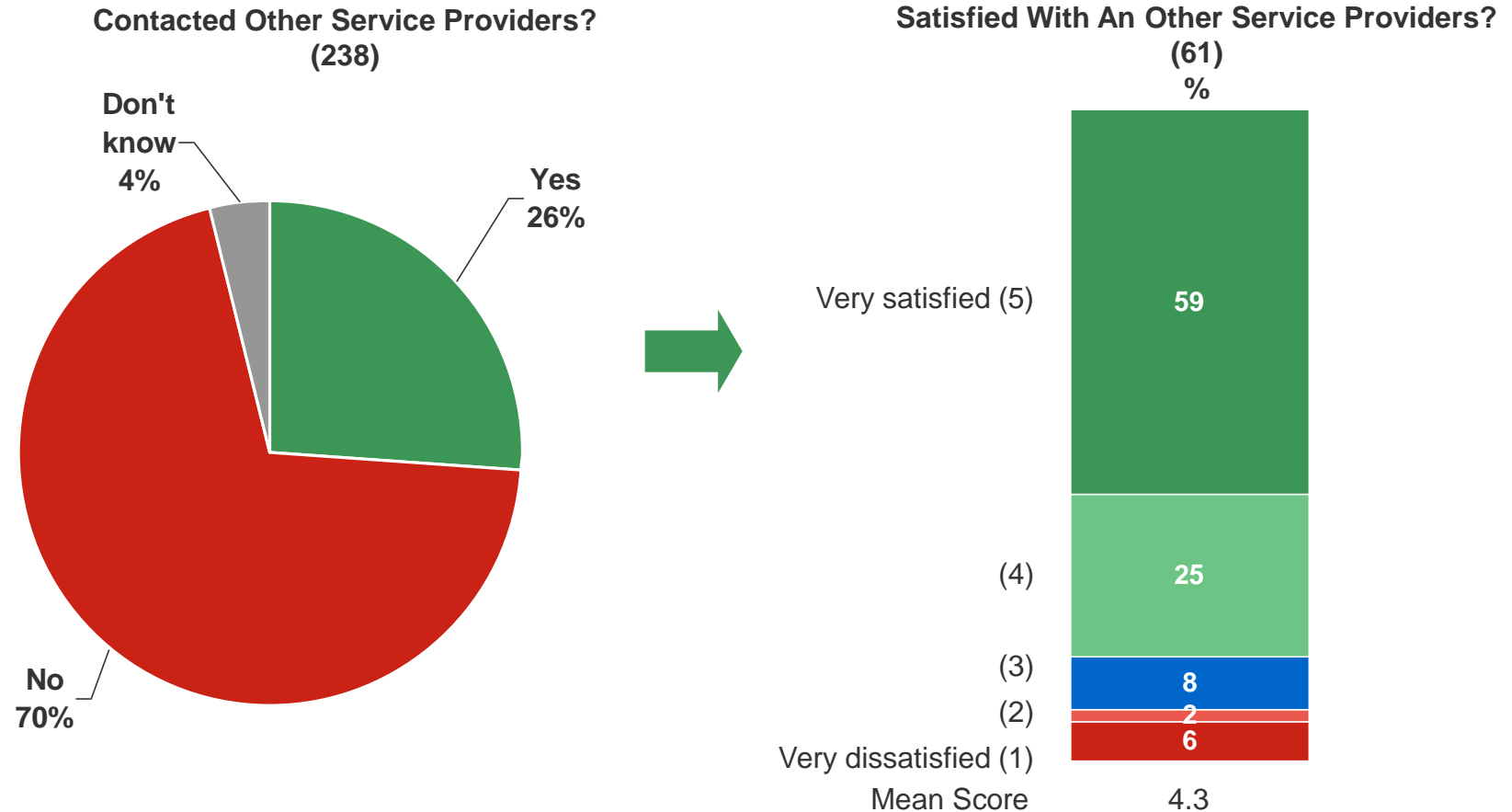


One in ten An Post users claim to have been in contact with An Post in the past 12 months. Of those who have been in contact, more than two thirds (67%) were satisfied with the standard of customer service received with An Post.

Base: All An Post Users  
All who contacted An Post in the past 12 months

# Contacted Other Service Provider In Past 12 Months & Satisfaction With Customer Service - 2010

- Q.28 In the past 12 months, have you ever contacted<INSERT SERVICE PROVIDER> by telephone / email / face to face etc, with regard to its postal service product offerings?
- Q.29 How would you rate your satisfaction with the standard of customer service you received with your provider using a scale of 1 to 5 where (1) is very dissatisfied and (5) is very satisfied?



More than a quarter (26%) of other service provider users claim to have been in contact with other service providers. Eight in ten users (84%) were satisfied with the standard of customer service received with an other service provider.

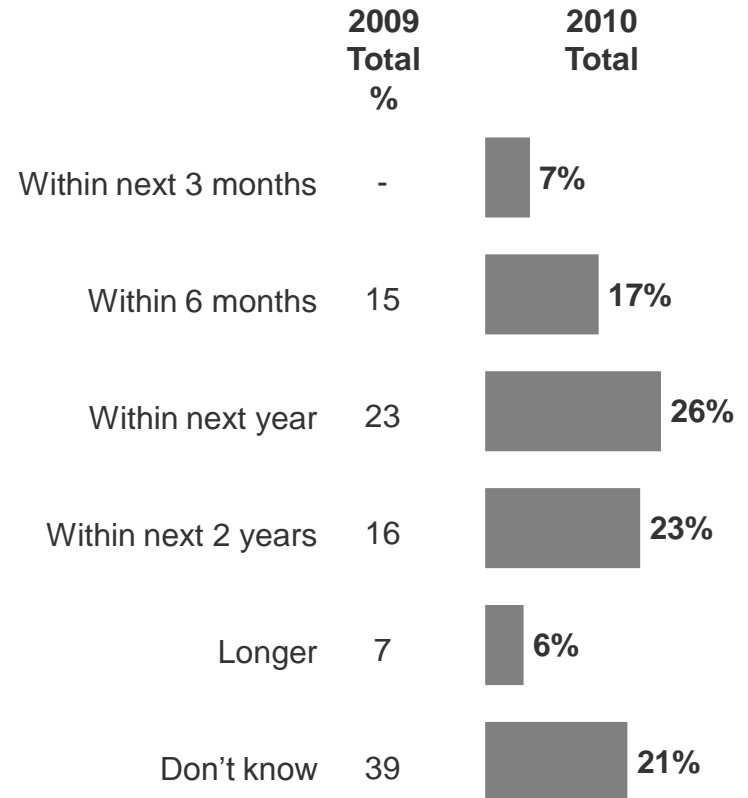
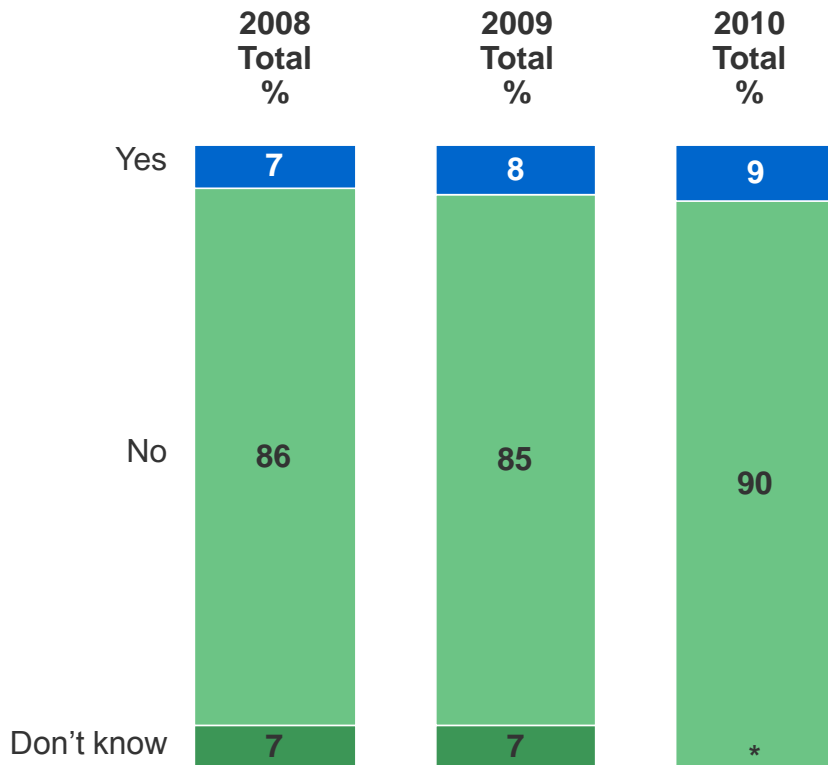
Base: All Other Service Providers Users  
All who contacted other providers in the past 12 months

# Awareness Of Market Liberalisation

# Awareness Of When Market Will Be Opened To Competition

**Q.38** Do you know when the postal market will be fully opened to competition in Ireland by the removal of An Post's monopoly of the standard letter market?

**Q.39** Approximately when do you think this is due to happen?



In 2010, only one in ten (9%) of households are aware of when the deregulation of the postal market will take place. Of those who are aware of deregulation, four in ten (43%) believe it will happen in the next 6 to 12 months.

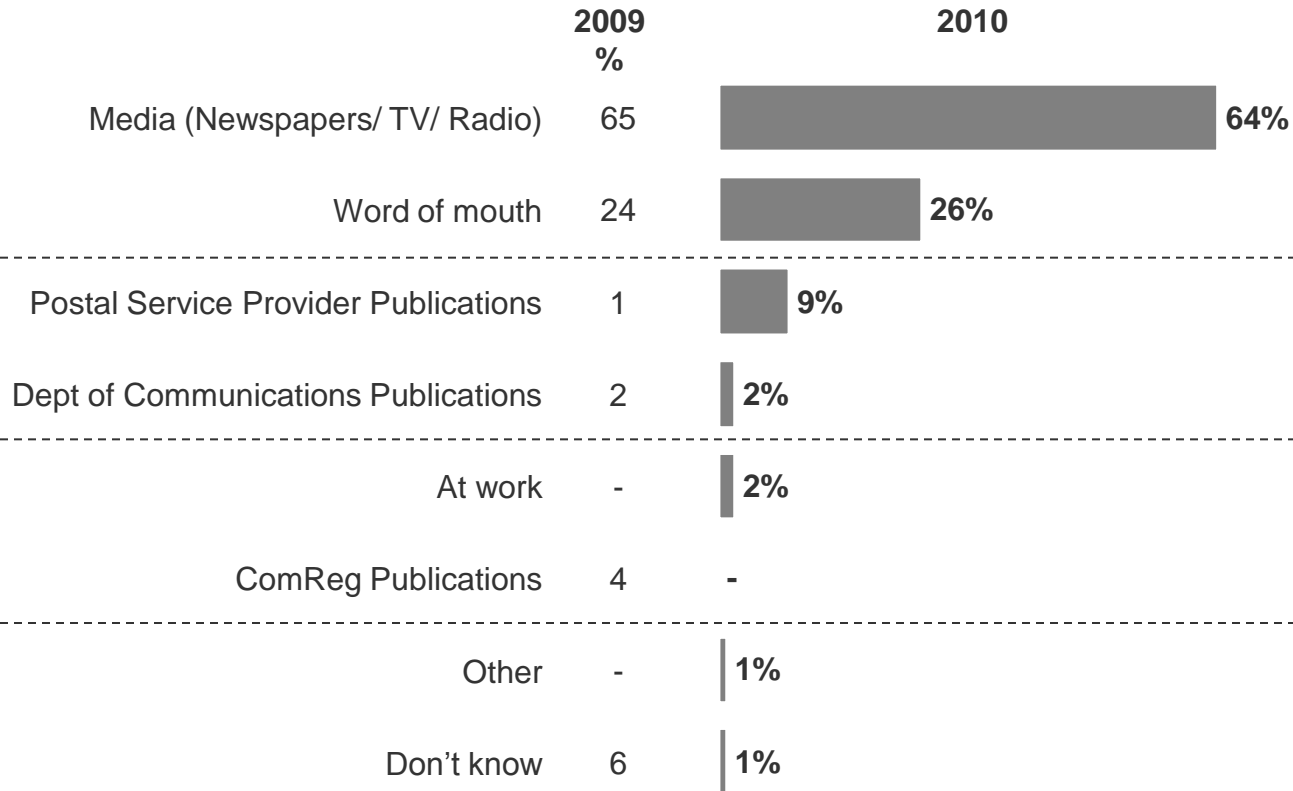
Base: All Respondents 18-74 yrs: 1,003

Base: All who claim to be aware: 93



# Where Heard About Full Market Opening

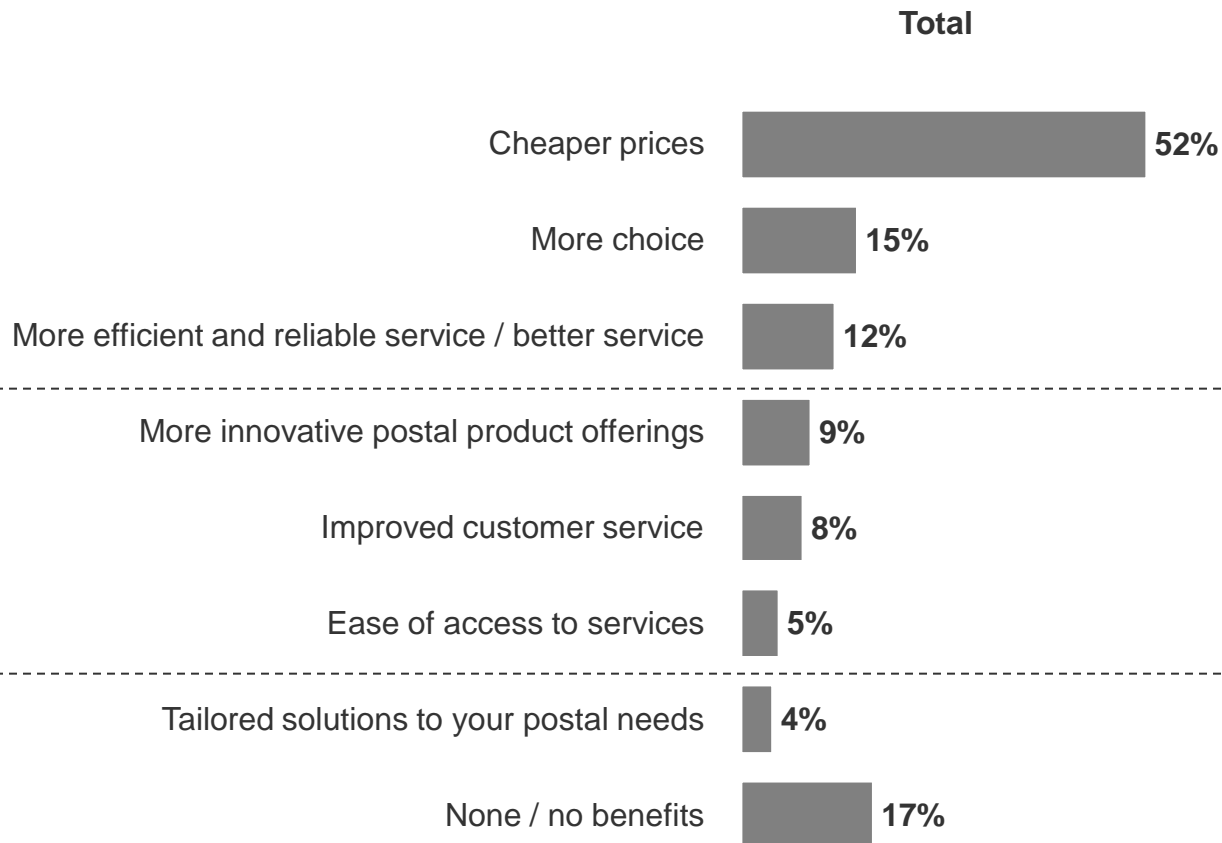
Q.40 Where did you hear about this?



In line with 2009 data, media is the main source of awareness (65%) regarding when the postal market will be open to competition, followed by word of mouth (26%).

# Benefits From Full Market Opening - 2010













Q.41a What benefits, if any, would you expect a fully open competitive postal market to bring?



More than half of respondents (52%) mentioned cheaper prices as one of the main benefits from postal market deregulation. More choice (15%) and more efficient and reliable service / better service (12%) were other benefits mentioned by respondents.

# Factors That Would Increase Usage Of Postal Services

Q.41b What factors if any, would result in you increasing your usage of postal services?

	2008 %	2008 %	2009 %	2010
Cheaper Prices / Price discounts*	33	34	35	 42%
Enhanced service quality	12	9	8	 9%
Faster service	n/a	n/a	n/a	 7%
More reliable service	15	10	11	 7%
More service product options	n/a	n/a	n/a	 7%
Earlier delivery times	n/a	n/a	n/a	 7%
Better customer service	n/a	n/a	n/a	 5%
Easier access to postal services	n/a	n/a	16	 5%
Increased security/ less lost mail*	10	8	9	 4%
Later delivery times	n/a	n/a	n/a	 2%
Other	n/a	n/a	n/a	 1%
Nothing	43	38	36	 41%

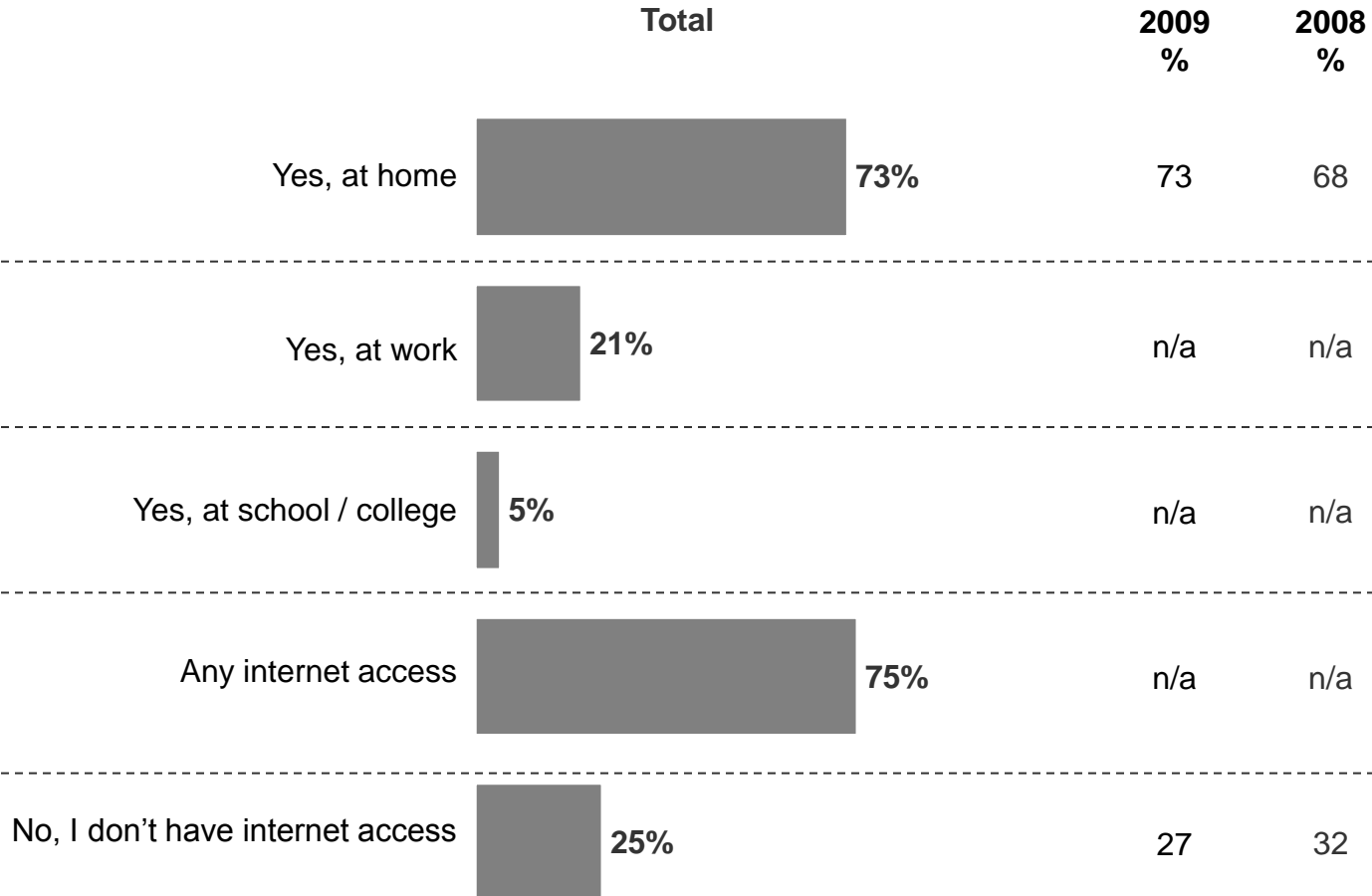
Cheaper prices is the most cited reason that would result in increasing respondent's usage of postal services. Having said that, the various service improvements mentioned (enhanced service quality, more reliable / faster service, more service product options, earlier delivery times, better customer service etc.) when aggregated would place service ahead of cost as the main factor that would increase respondent's usage of postal services.

# Internet Usage & Postal Services



# Internet Access - 2010

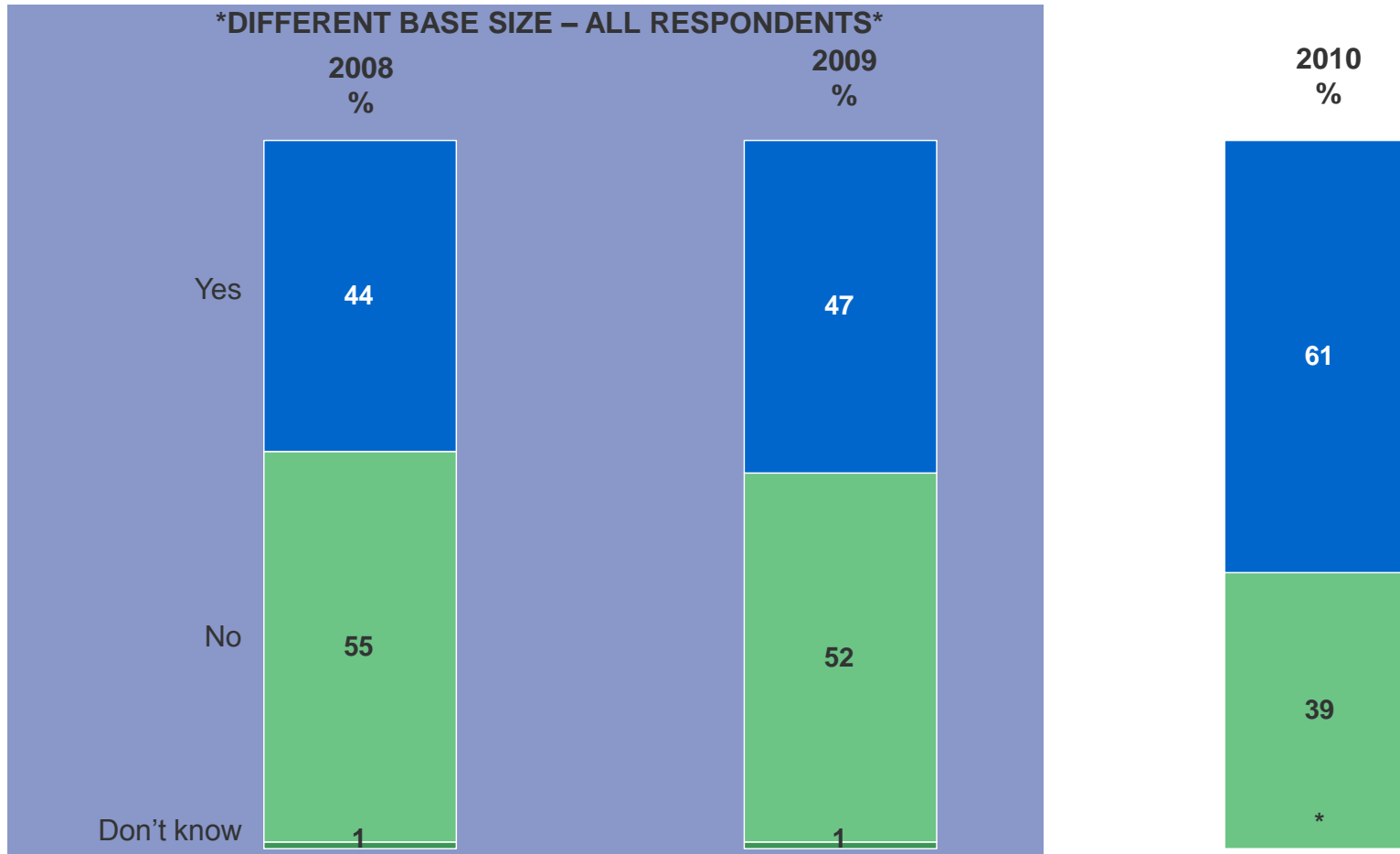
Q.42 Do you have access to the internet in any of the following locations?



75% of respondents claim to have access to the internet. Similar to 2009's figures, nearly three in four (73%) respondents have internet access at home and a further one in five have internet access at work.

# Incidence Of Shopping Online

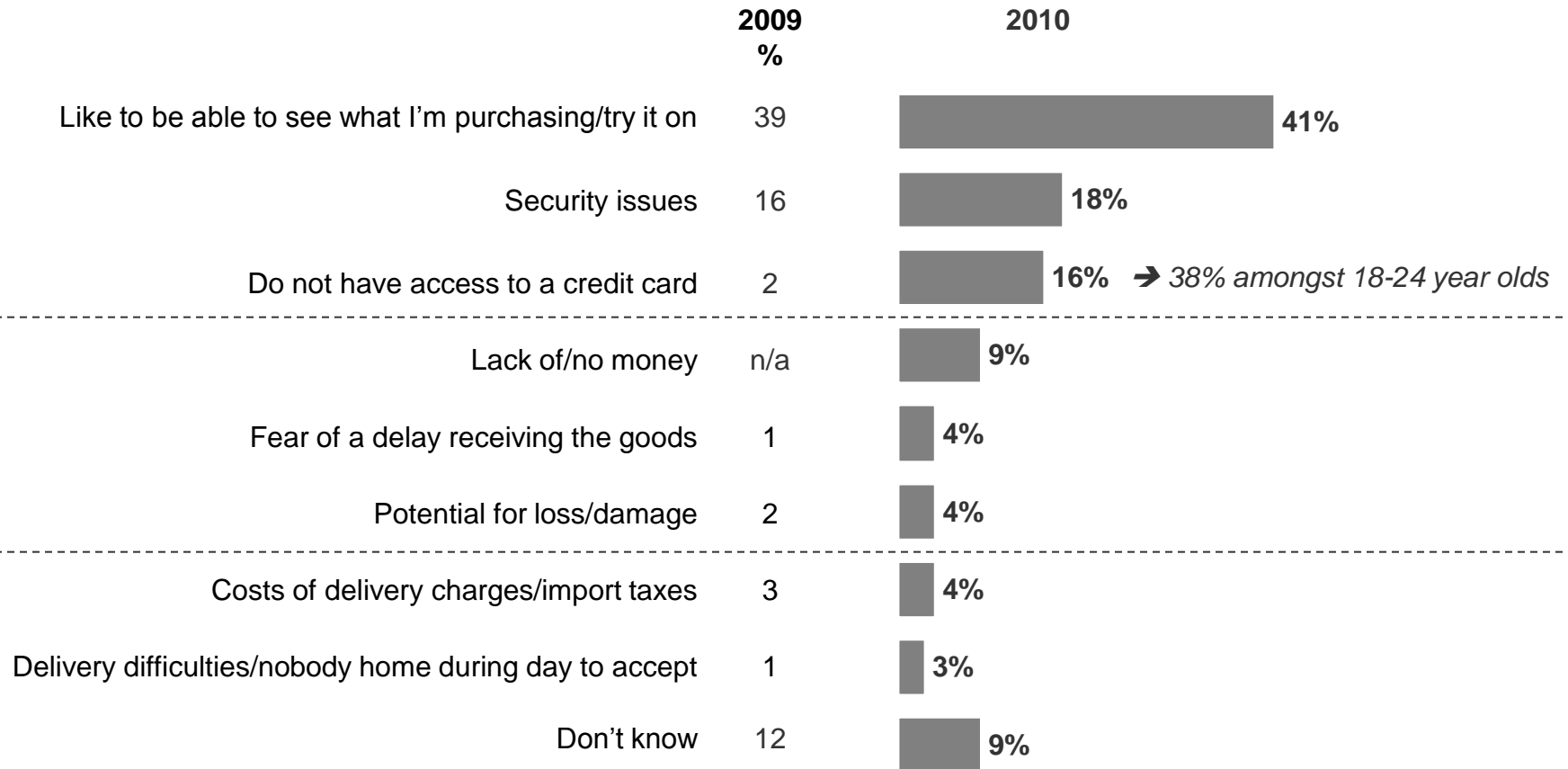
Q.43 Have you shopped for anything online over the past 12 months?



In 2010, an increase in scores is noted with six in ten respondents claiming to have shopped online in the past 12 months. The profile of online shoppers is similar to the profile of early internet adopters (younger, male, middle class (ABC1), living in Dublin).

# Reasons For Not Shopping Online

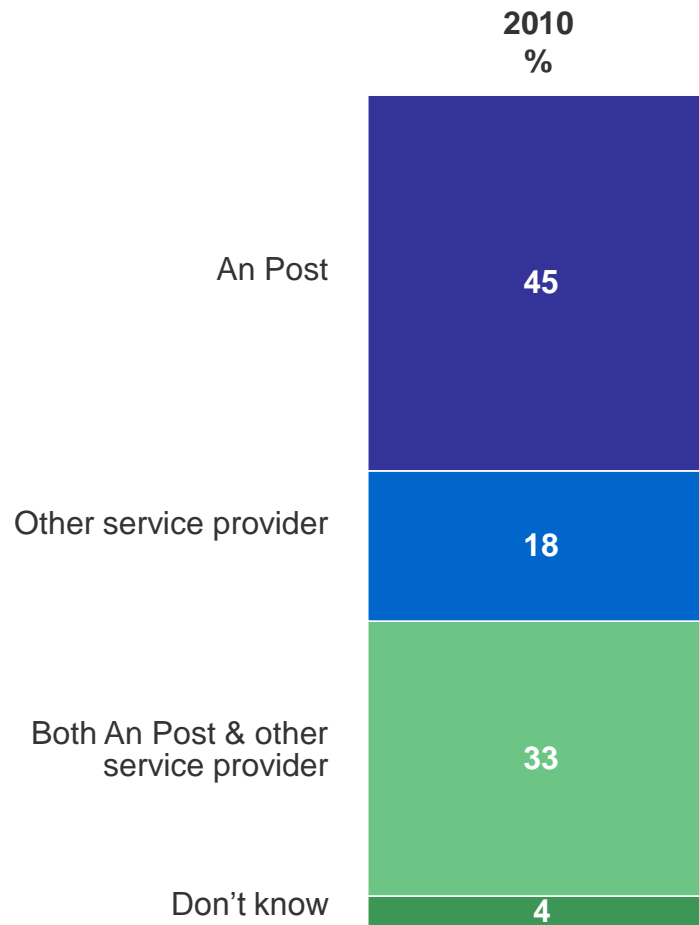
Q.44 Why have you not shopped online?



The most commonly mentioned reason for not shopping online is “like to be able to see what I’m purchasing/try it on (41%), followed by security issues (18%) and, especially for younger internet users, not having access to a credit card (16%).

# How Goods Purchased Delivered

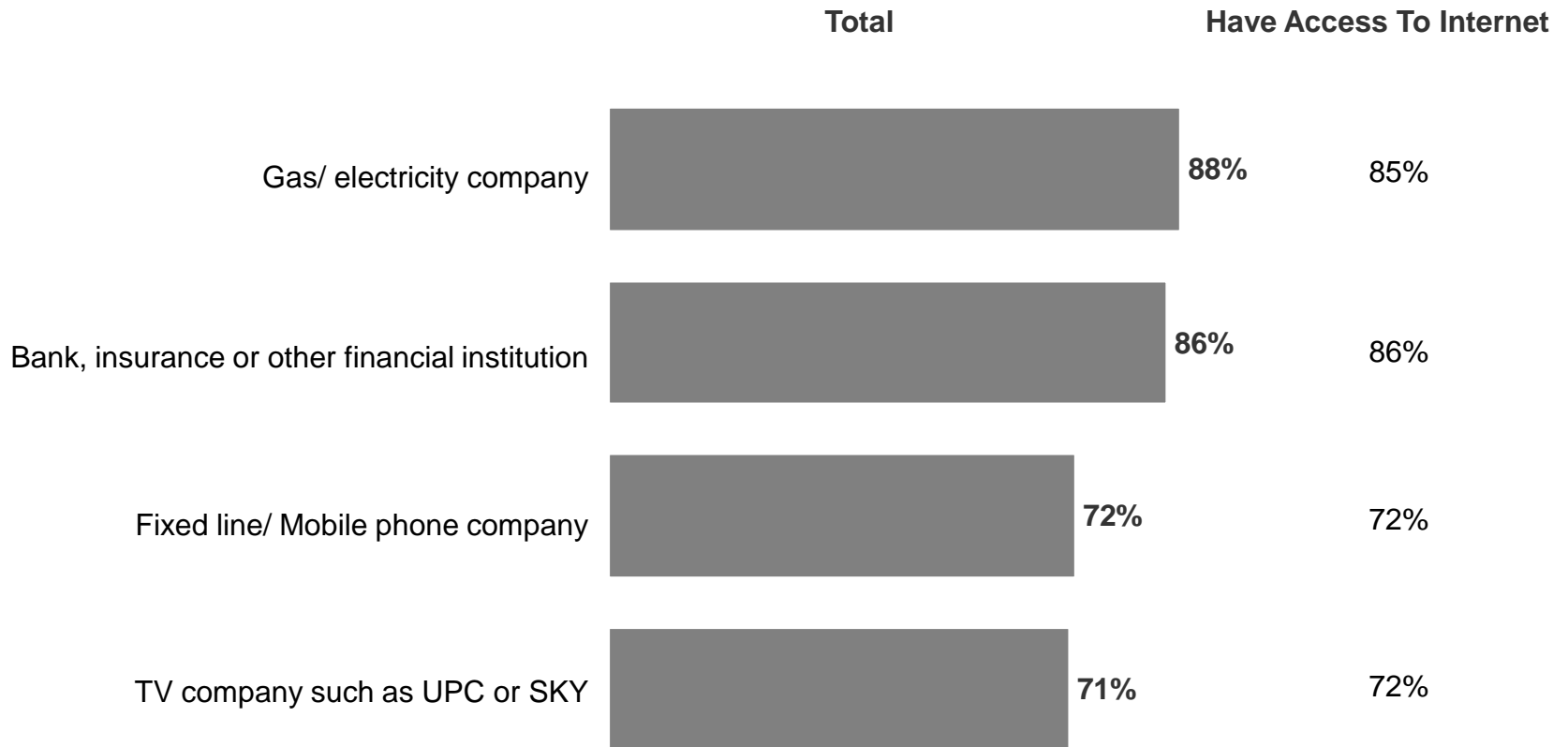
Q.45 Do you generally have these goods delivered to your household by An Post or by another postal service provider?



In 2010, 45% of respondents claim to have the goods delivered only by An Post, with one in three (33%) receiving deliveries from both An Post and other service providers.

# Incidence of Receiving Utility Bills - 2010

Q.46 Do you personally receive a paper bill or statement in the post from any of the following?

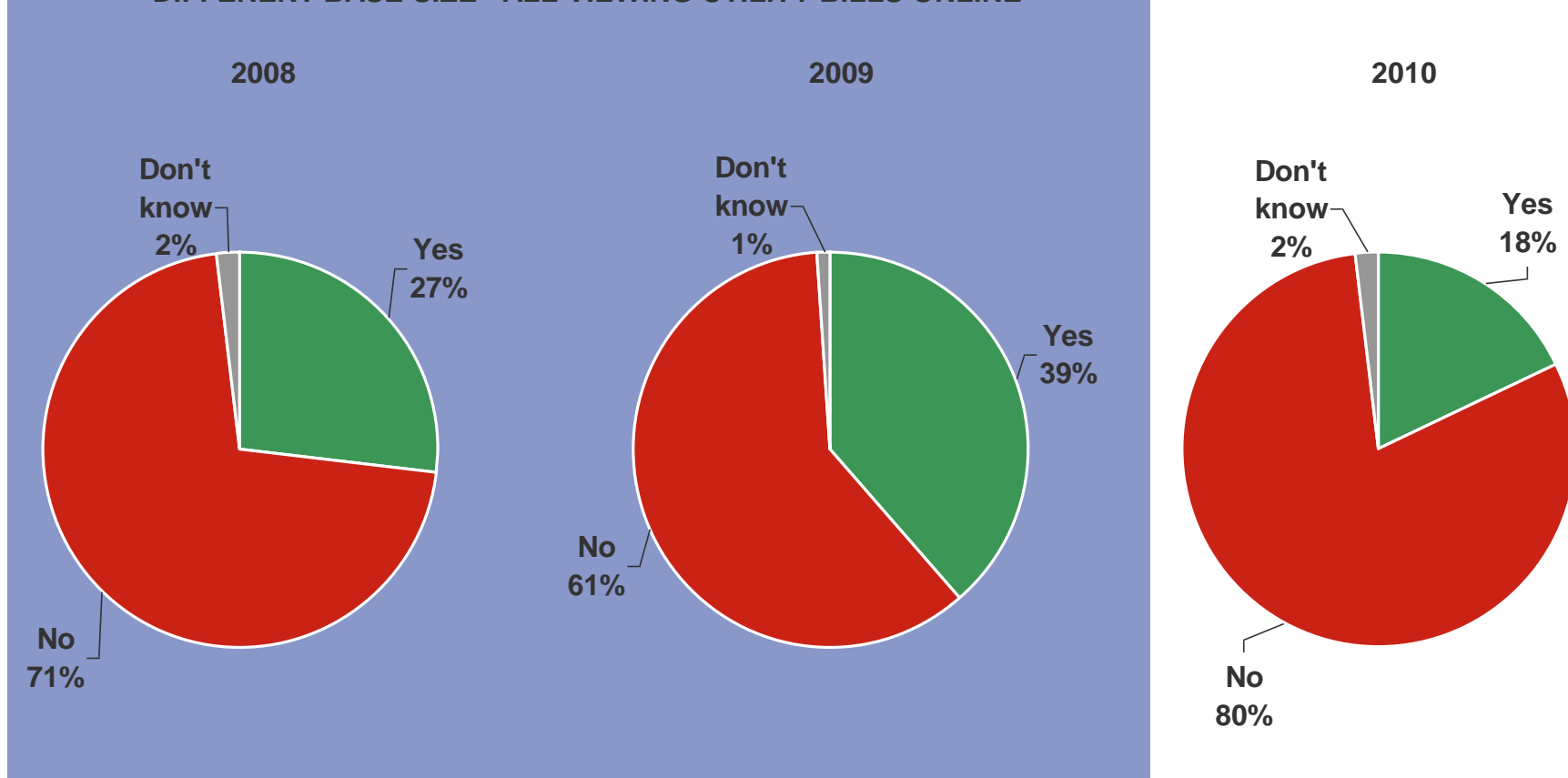


Despite most companies offering online billing, almost 9 in 10 respondents personally receive a paper bill from a gas/electricity company (88%) together with a statement from a bank, insurance or other financial institution (86%).

# Incidence Of Switching Transaction Type Mail From Postal Delivery To Online

Q.47 Have you switched any of your transaction type mail, such as bills, from being delivered by post to being delivered online in the past 12 months?

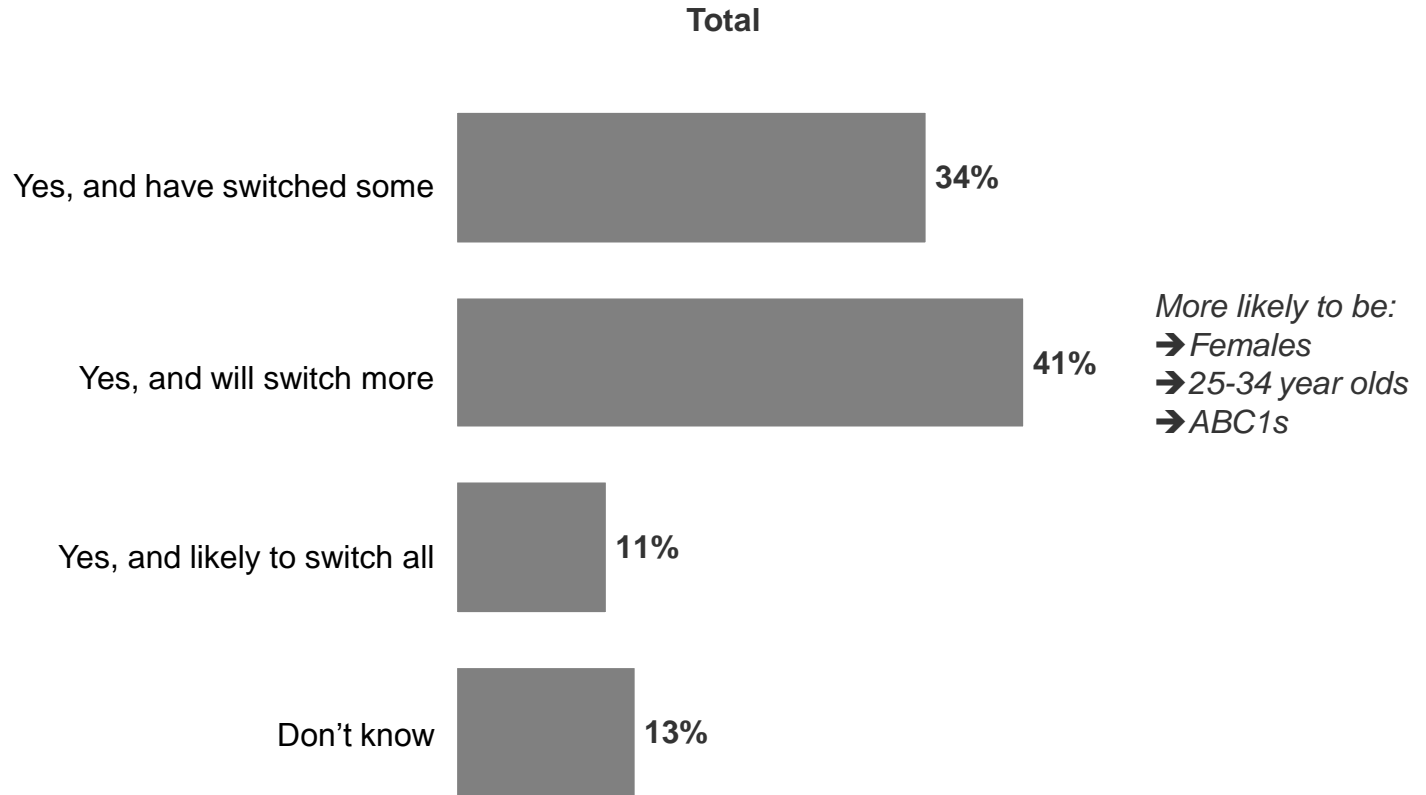
\*DIFFERENT BASE SIZE - ALL VIEWING UTILITY BILLS ONLINE\*



In 2010, households are less likely to have switched from postal to online delivery compared to 2009. Nearly two in ten (18%) households claim to have switched transaction type mail from postal to online delivery in 2010.

# Likelihood Of Switching Transaction Type Mail - 2010

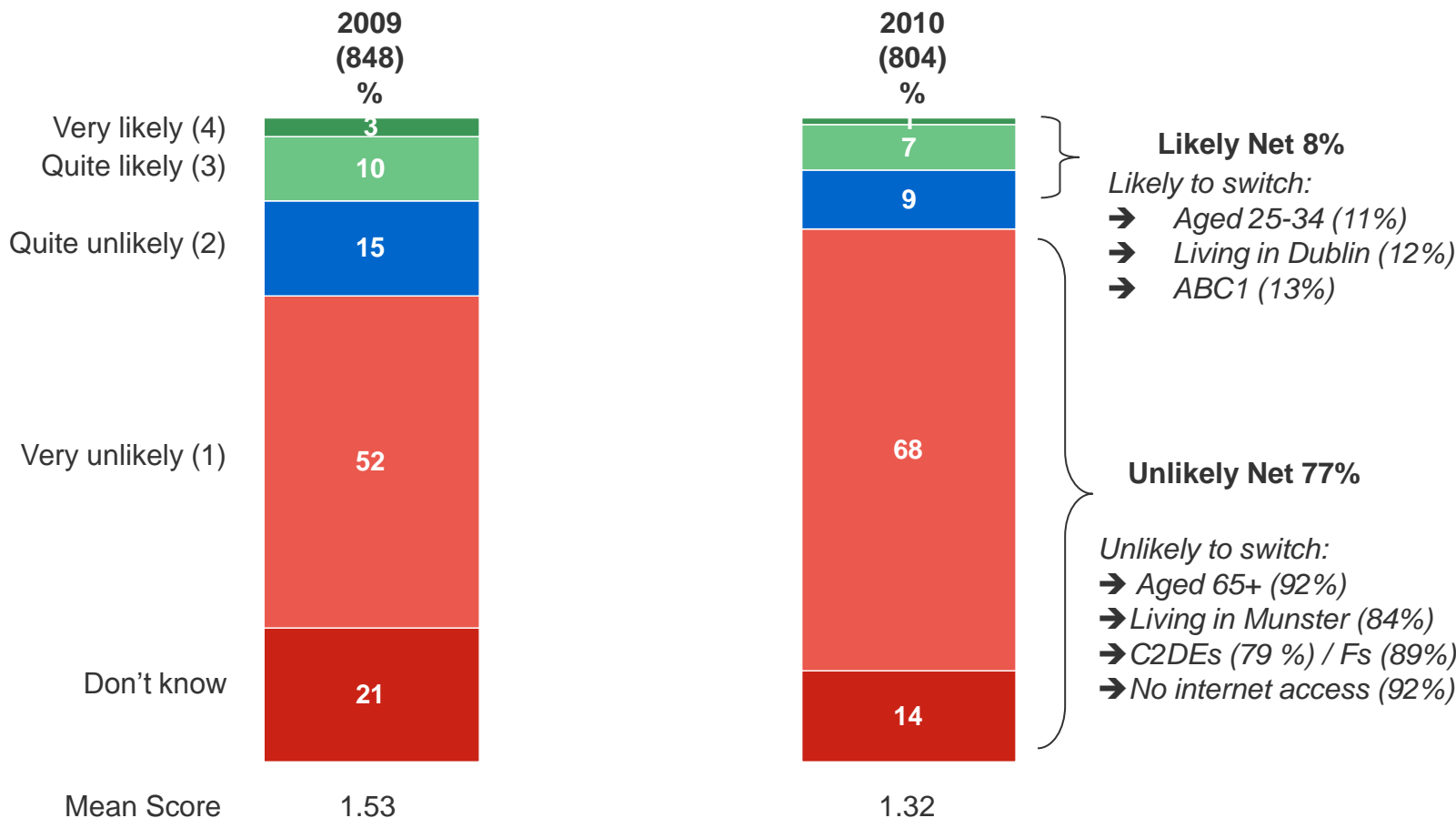
Q.48 Have you switched some or all of your transaction type mail?



Four in ten (41%) households claim that they are likely to switch more of their transaction type mail from postal to online delivery and a further one in ten are likely to switch all (11%) of their transaction type mail.

# Likelihood Of Switching Transaction Type Mail Online

Q.49 How likely are you to switch any of your transaction type mail (i.e. bills or statements) to being delivered online over the next 12 months?



More than three quarters of households (77%) claim to be “very / quite unlikely” to switch their transaction type mail to being delivered online over the next 12 months.

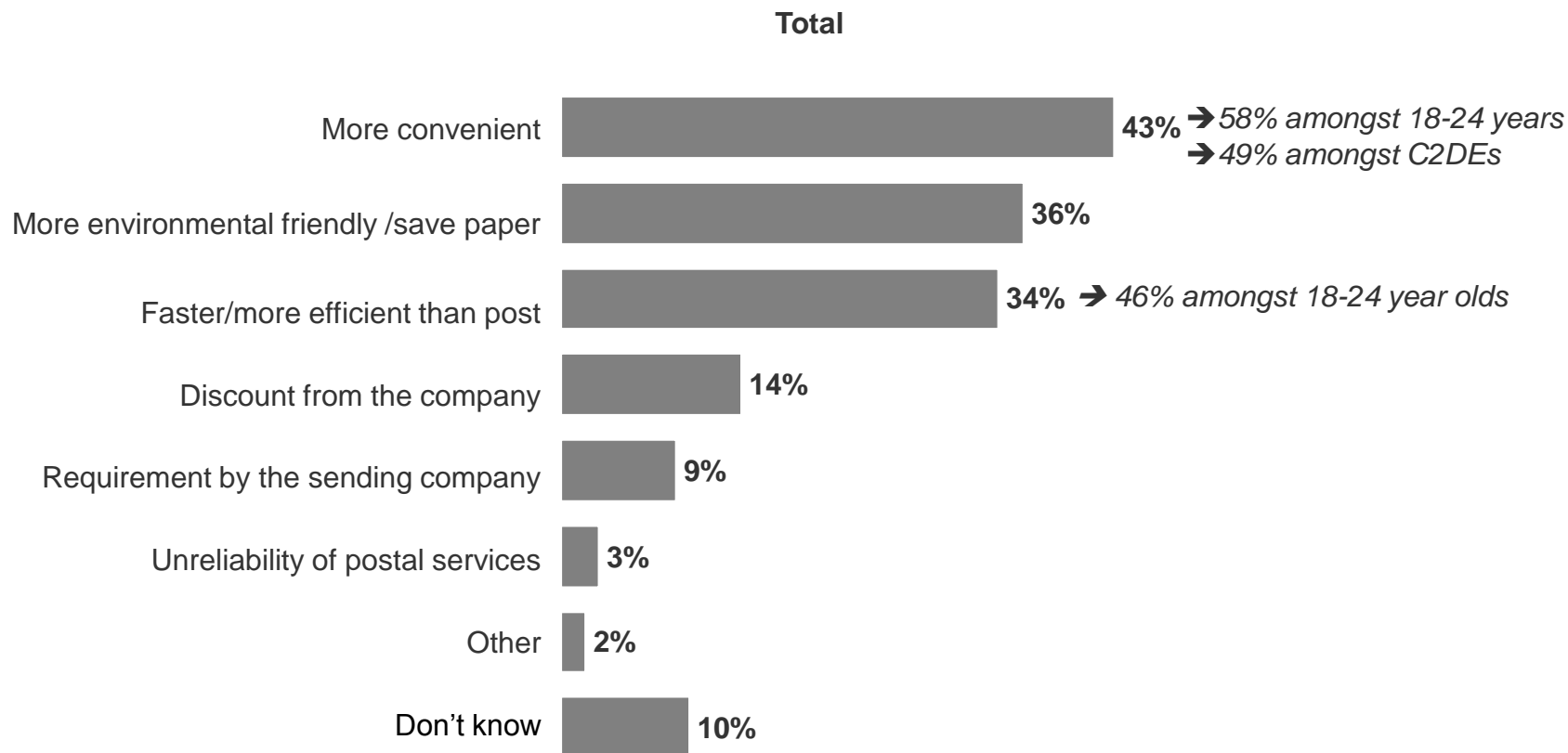
Base: All who have not switched any of their transaction type mail from postal to online delivery in the past 12 months: 804



# Reasons For Switching Transactional Mail From Postal To Online Delivery - 2010

57

Q.50 What is your main reason for switching delivery of your transactional mail to online delivery?



The most commonly mentioned reason for switching transactional mail from postal to online delivery is convenience (41%) followed by environmental reasons (36%) and speed / efficiency (34%).

Base: All who have switched any of their transaction type mail in the past 12 months or are likely to switch transaction type: 253

# Conclusions

## Usage:

- Irish households almost universally (97%) use An Post for sending mail. The majority (75%) of households only use An Post, with almost one in four (23%) using another service provider.
- Next to An Post, DHL Express (Ireland) Limited is the best known brand, with 53% awareness, and enjoys the highest level of past 12 month usage (8%) amongst other service providers.
- On average, Irish households claim to receive on average 7.4 per week while a monthly average of 6.1 is the number of mail items sent with An Post.
- Letter post items (standard and large) are mostly the domain of An Post, with An Post and other service providers more actively competing in the packages and parcels market.
- Mail volumes appear to be declining for personal post, however mail volumes appear to be growing in the online purchases segment.
- Where complaints were made to An Post, four in ten (41%) were dissatisfied with how the complaint was handled.

## Satisfaction:

- Satisfaction with An Post has improved since 2009, on all three key criteria (reach correct destination, next working day and cost). Currently more than nine in ten (93%) An Post users are confident their letter will reach its correct destination. However confidence falls to 87% with regard to its delivery on the next working day.
- Satisfaction levels with other service providers stands at 85% for confidence in delivery to correct destination and 86% for the agreed time/day; essential performance criteria for packages/parcels segments.
- One in six (17%) An Post users experienced issues with An Post, mostly relating to wrong address or lost deliveries.

## Other Issues:

- Almost one in ten (9%) are now aware of deregulation, with most of those aware expecting it to happen in the next two years. Media (64%) is the key source of awareness and cheaper prices (52%) is perceived to be the number one benefit of deregulation.
- A combination of lower prices and better service would be the main factors for increasing usage of the postal service.
- Internet access appears to be levelling out (currently at 73%), however online shopping continues to grow (61% in the past year).
- For transaction type mail the indications are that more households will continue to switch to online billing over time, although just 8% of those who have not switched in the past year are very / quite likely to do so in the next 12 months.



# Postal Service Residential Survey 2010

December 2010