

ComReg Trends Survey 2006 – Postal Service

**Prepared by Amárach Consulting
March 2007**

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Introduction

Introduction

- The research contained in this report is based on findings from a survey conducted by Amárach Consulting in Q3 2006 among 1012 adults throughout Ireland, aged 15-74. The results are compared where relevant with a similar survey of 1008 adults which was conducted in Q3 2005.
- The surveys were conducted from August 8th – September 1st 2005 and 16th August – 13th September 2006, with the results weighted up to the total adult population aged 15-74 using the most recent CSO statistics.
- As insufficient data on mail delivery was collected, callback interviews were required to supplement the data.
 - ▣ The first of these callbacks, to obtain more information on the use of alternative providers for a range of purposes, was conducted in Nov/Dec 2006. In this case 470 of the total base were recontacted.
 - ▣ The second callback, to get further details regarding the alternative operators which respondents were aware of, was conducted in Jan 2007. In this case 140 people were successfully recontacted.
 - ▣ The lower base sizes for these questions are reflected in the relevant slides in this report.

Data Interpretation

- 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 opposite statistical variance applicable to all survey based studies of this nature.
- 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 top of each slide

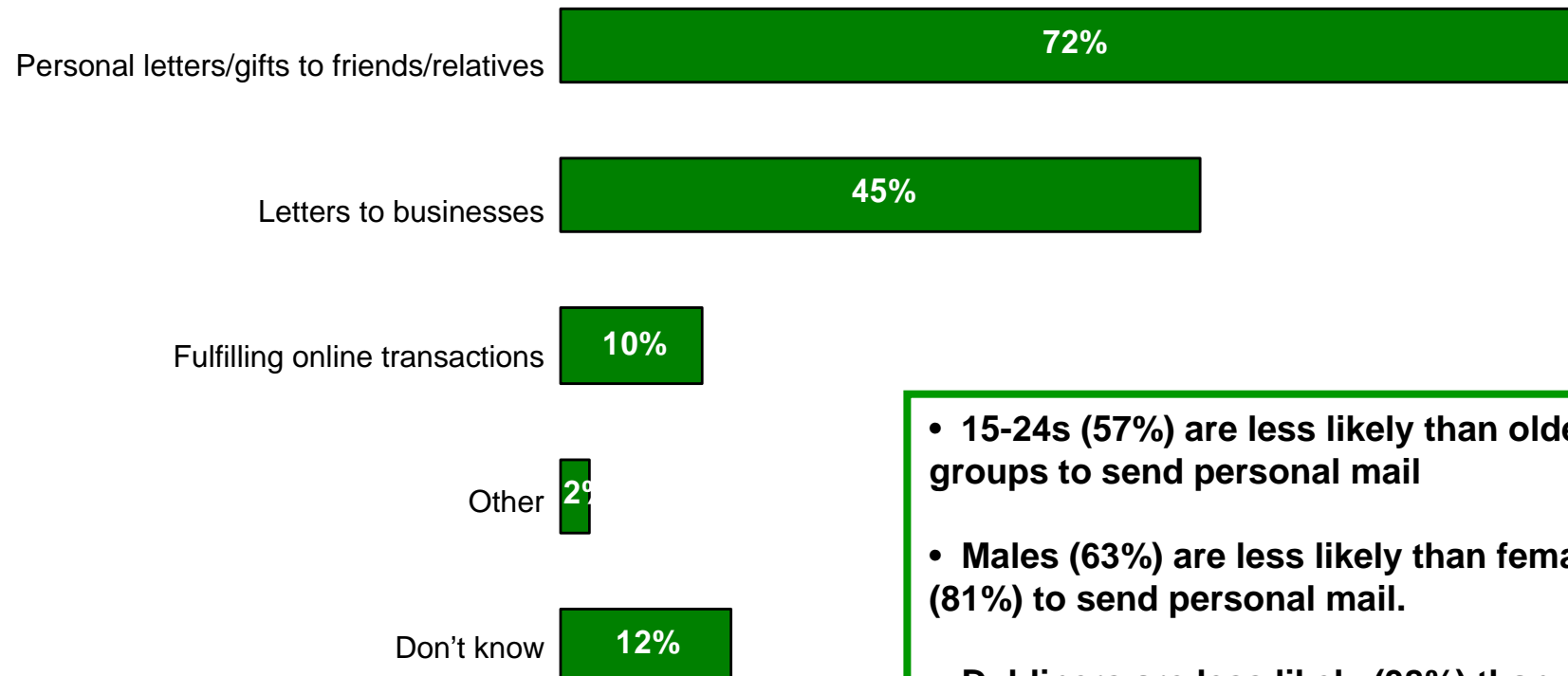
Percentage of respondents who said...	1,000	500	100
10%	+/-2%	+/-3%	+/-6%
20%	+/-3%	+/-4%	+/-8%
25%	+/-3%	+/-4%	+/-8%
40%	+/-3%	+/-5%	+/-10%
50%	+/-4%	+/-5%	+/-10%
60%	+/-3%	+/-5%	+/-10%
75%	+/-3%	+/-4%	+/-8%
80%	+/-3%	+/-4%	+/-8%
90%	+/-2%	+/-3%	+/-6%

- 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

Postal Items Sent

Types of Mail Sent – Unprompted

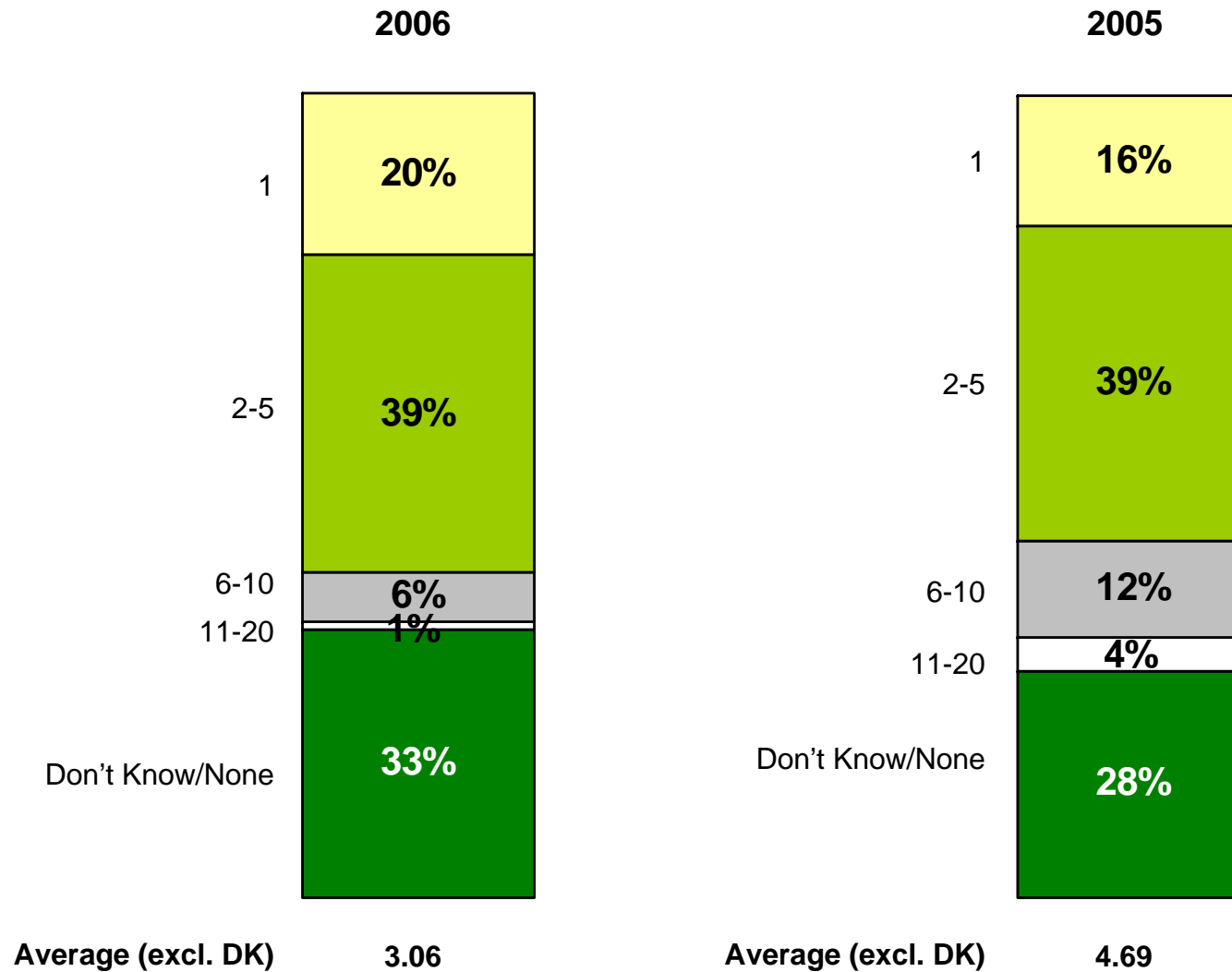
Base: All Respondents N = 1012 in 2006



- 15-24s (57%) are less likely than older age groups to send personal mail
- Males (63%) are less likely than females (81%) to send personal mail.
- Dubliners are less likely (38%) than other regions to send letters to businesses via mail.

Average Amount of Mail Sent

Base: All Respondents n= 1012 in 2006, 1008 in 2005



Average Amount of Mail Sent

Base: All Respondents n= 678 in 2006, 726 in 2005 (excl. Don't Knows)

Mean scores excl. don't know		2006	2005
TOTAL		3.06	4.69
Gender	<i>Male</i>	3.18	4.71
	<i>Female</i>	2.96	4.66
Age	<i>15-24</i>	2.93	4.69
	<i>25-34</i>	2.77	4.78
	<i>35-44</i>	3.23	4.61
	<i>45-54</i>	3.88	4.86
	<i>55-64</i>	2.89	5.33
	<i>65-74</i>	2.16	3.12
Social Class	<i>AB</i>	4.77	6.93
	<i>C1</i>	3.29	5.44
	<i>C2</i>	2.88	4.10
	<i>DE</i>	2.37	3.28
	<i>F</i>	2.66	4.24

Mean scores excl. don't know		2006	2005
No of people in household	<i>One</i>	2.56	4.25
	<i>Two</i>	2.97	4.25
	<i>Three</i>	3.54	4.60
	<i>Four</i>	2.98	5.20
	<i>Five</i>	3.07	4.83
Region	<i>Dublin</i>	2.64	4.73
	<i>RoL</i>	3.67	4.38
	<i>Munster</i>	2.90	4.36
	<i>Conn/Ulst</i>	3.08	5.48
Business from home	<i>Yes</i>	4.46	9.10
	<i>No</i>	2.89	4.26

The averages for 2006 exclude 'don't know' answers. To facilitate comparison, the 2005 figures have been adjusted to exclude 'don't knows' also.

These averages relate to all postal providers i.e. An Post and all other ASPs

Average Amount of Mail Sent

Base: All Respondents n= 678 in 2006, 726 in 2005 (excl. Don't Knows)

- **Those with home Internet access send more items (3.87) than those without (2.47), while ABC1s send more (3.58) than C2DEs (2.58).**
- **Those located in Dublin send less items per week (2.64) than average, while those in the Rest of Leinster (3.67) send more than average.**
- **In comparison to the average mail volumes sent in 2005, there have been some interesting changes in behaviour in some demographic groups:**
 - **The 45-54 age-group sent above average mail volumes in 2006 in comparison to 2005, when they were more in line with the average.**
 - **The 55-64 age-group sent below average volumes of mail in 2006 – in 2005 they were significantly above average.**
 - **Those running a business from home sent about twice the average volume in 2005. In 2006 this dropped to 1.5 times the average.**

Awareness of Alternative Postal Services

Base: All Respondents n= 1012 in 2006, 1008 in 2005

% saying Yes		2006	2005
TOTAL		47%	30%
Gender	<i>Male</i>	48%	29%
	<i>Female</i>	46%	32%
Age	<i>15-24</i>	40%	27%
	<i>25-34</i>	51%	37%
	<i>35-44</i>	61%	36%
	<i>45-54</i>	49%	34%
	<i>55-64</i>	46%	26%
	<i>65-74</i>	28%	11%
Social Class	<i>AB</i>	62%	43%
	<i>C1</i>	61%	35%
	<i>C2</i>	46%	28%
	<i>DE</i>	35%	26%
	<i>F</i>	25%	20%

% saying Yes		2006	2005
No of people in household	<i>One</i>	45%	19%
	<i>Two</i>	52%	31%
	<i>Three</i>	54%	33%
	<i>Four</i>	47%	30%
	<i>Five</i>	37%	29%
Region	<i>Dublin</i>	45%	39%
	<i>RoL</i>	47%	21%
	<i>Munster</i>	51%	28%
	<i>Conn/Ulst</i>	48%	33%
Business from home	<i>Yes</i>	59%	42%
	<i>No</i>	46%	29%

Awareness of Alternative Postal Services

Base: All Respondents n= 1012 in 2006, 1008 in 2005

- **Awareness levels in Leinster (excl Dublin) are now on a par with the average, a significant increase compared to last year.**
- **Awareness is higher among those with home Internet access (55%) than those without (41%) and also among those who run a business from home, at 59%.**
- **When we compare the 2006 average level of awareness of alternative providers among demographic groups to the average for the full population (47%), there are interesting changes from 2005 results among some groups:**
 - **The 35-44 age group are much more aware of alternative providers than average. This marks an increase in awareness since 2005.**
 - **Awareness of alternative operators is lower than average among those aged 65-74 at 28%, but significantly this is more than twice the awareness level recorded in 2005.**
 - **As was the case in 2005, ABC1s have above average awareness levels. However C1s are now more likely than average to be aware than they would have been in 2005.**

Awareness of Alternative Postal Services

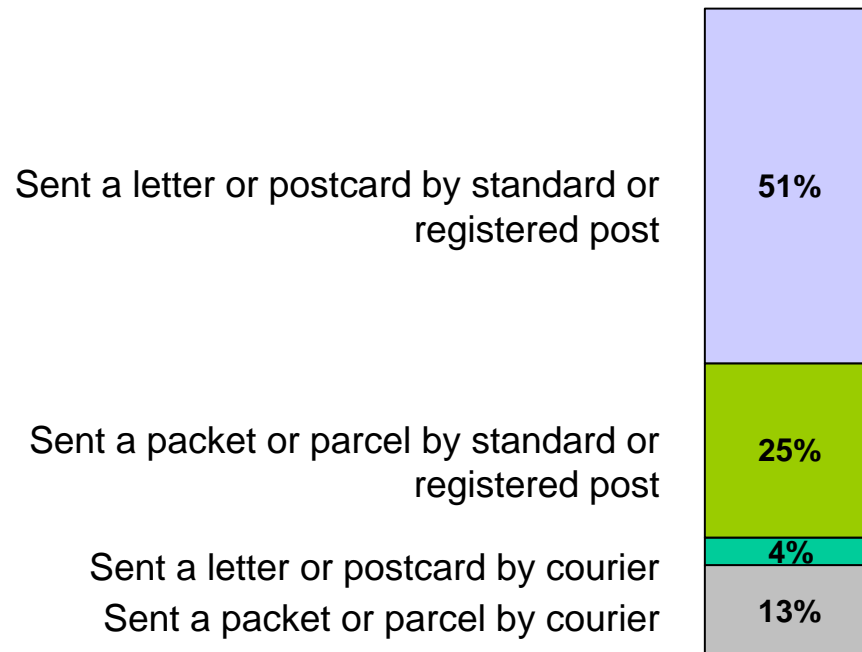
Base: All Respondents n= 142 (callbacks Jan 2007)

Postal providers respondents were aware of include:

- **Cyclone Couriers**
- **DHL**
- **Fastway**
- **FedEx**
- **Interlink**
- **Nightline**
- **SDS**
- **Target Express Ireland**
- **TNT Express**
- **UPS**

Usage of Mail Services (within the last year)

Base: All Respondents N = 470 (callbacks Nov/Dec 2006)

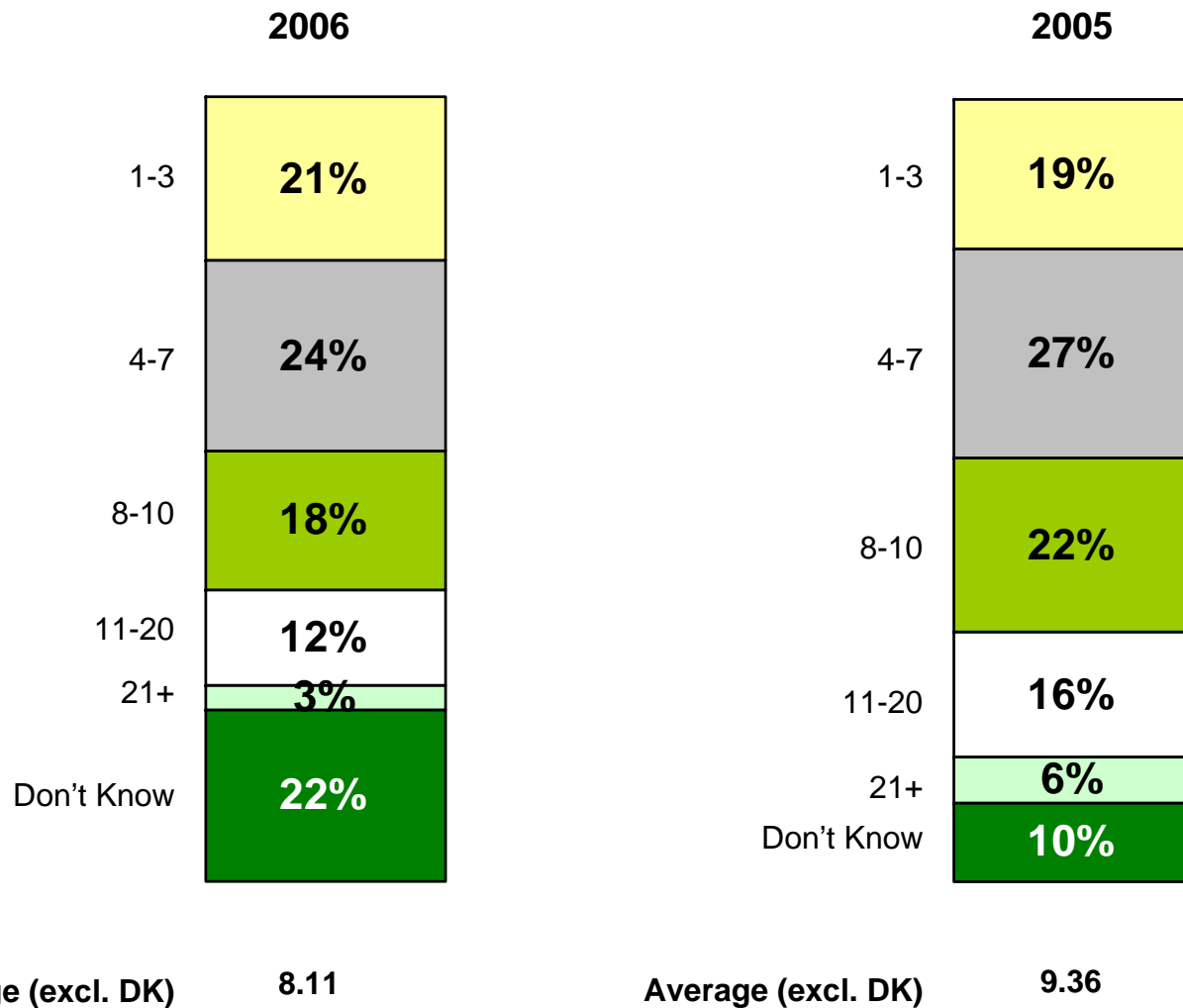


- Those who run a business from home are more likely to send a letter, packet or parcel by courier than those not doing so.
- Females are more likely than males (16% vs. 9%) to send a packet or parcel by courier.

Postal Items Delivered

Items of Mail Delivered to Home Address Weekly

Base: All Respondents n= 1012 in 2006, 1008 in 2005



Items of Mail Delivered to Home Address Weekly

Base: All Respondents n= 789 in 2006, 907 in 2005 (excl. Don't Knows)

Mean scores excl. don't know		2006	2005
TOTAL		8.11	9.36
Gender	<i>Male</i>	8.42	9.38
	<i>Female</i>	7.82	9.33
Age	<i>15-24</i>	8.08	9.72
	<i>25-34</i>	8.17	8.87
	<i>35-44</i>	8.80	9.26
	<i>45-54</i>	9.35	11.22
	<i>55-64</i>	7.20	9.34
	<i>65-74</i>	5.69	5.94
Social Class	<i>AB</i>	11.14	13.04
	<i>C1</i>	9.23	10.59
	<i>C2</i>	7.28	8.44
	<i>DE</i>	6.27	7.23
	<i>F</i>	8.48	9.1

Mean scores excl. don't know		2006	2005
No of people in household	<i>One</i>	5.20	5.65
	<i>Two</i>	7.43	8.48
	<i>Three</i>	9.14	8.55
	<i>Four</i>	8.24	11.18
	<i>Five</i>	9.37	10.2
Region	<i>Dublin</i>	7.32	9.74
	<i>RoL</i>	7.76	8.7
	<i>Munster</i>	8.54	9.17
	<i>Conn/Ulst</i>	9.07	9.95
Weekly volume of mail sent	<i>1-5</i>	7.15	7.94
	<i>6-10</i>	14.16	13.1
	<i>11-20</i>	21.55	23.83
Business from home	<i>Yes</i>	12.44	15.31
	<i>No</i>	7.59	8.79

The averages for 2006 exclude 'don't know' answers. To facilitate comparison, the 2005 figures have been adjusted to exclude 'don't knows' also.

These averages relate to all postal providers i.e. An Post and all other ASPs

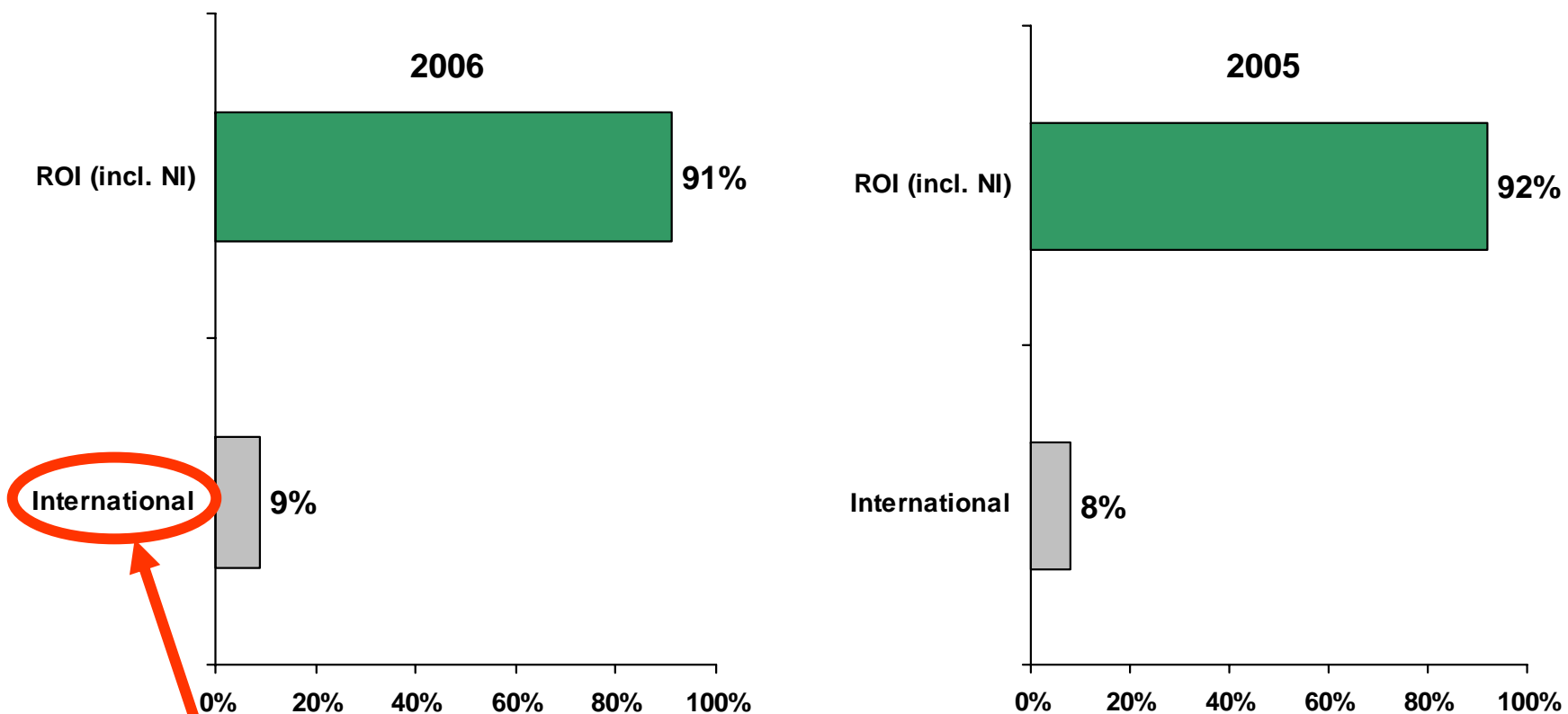
Items of Mail Delivered to Home Address Weekly

Base: All Respondents n= 789 in 2006, 907 in 2005 (excl. Don't Knows)

- **Males continue to receive more items of mail than females (8.42 vs. 7.82 items).**
- **As was the case in 2005, ABC1s receive more mail (9.75 items per week) than C2DEs (6.72 items).**
- **The amount of mail delivered is lower than average for those aged 65+ at just 5.69 items per week, but not to the same extent as in 2005.**
- **Dublin respondents receive less than the average number of mail items.**
- **Mail volumes received have not declined to the same extent in Conn/Ulster that they have in other regions.**
- **Those with home Internet access receive more items (10.82) than those without (6.24).**
- **Those who run a business from home continue to receive more mail than average (12.44 items).**

Average Percentage of Mail which Household Receives From ...

Base: All Respondents n= 810 in 2006, 937 in 2005 (excl. Don't Knows)



- Receipt of International mail is higher among students (9.44%), ABC1s (10.87%) and 25-44s (9.99%).
- Likely as a consequence of online shopping, those with home Internet access receive more international mail (10.89%) than those without (7.04%).

Type of Mail Received

Base: All Respondents n= 1012 in 2006

Friends & Family

- 24% saw an increase in volume of mail received from family & friends. In Munster this was 33%.
- 60% saw no change in volume of mail received from family & friends.

Personal Letters from Business

- 15% saw an increase in volume of mail received from businesses. This figure rises to 20% for those with Internet access.
- 53% saw no change in volume of mail received from businesses.

Addressed Direct Mail

- 25% saw an increase in volume of addressed direct mail received.
- 44% saw no change in volume of addressed direct mail received.

Unaddressed Direct Mail

- 39% saw an increase in volume of unaddressed direct mail received.
- 30% saw no change in volume of unaddressed direct mail received.

Mail Received

Base: All Respondents n= 1012 in 2006

- 53% claim to know frequency of mail delivery to their home.
 - Within these, 29% receive mail every day.
 - Those aged 25-44 (35%) or 45-64 (31%) are more likely to receive mail every day than those aged 15-24 (22%) or 65-74 (16%).
 - There is no difference between the regions in terms of the number who claim to receive mail every day.
 - 24% receive mail 2-3 times a week.
 - Those aged 15-24 (15%) are least likely to claim to receive mail 2-3 times a week, while those aged 65-74 are most likely to do so (30%).
 - Those in Munster are less likely (18%) than average to claim that they receive mail 2-3 times a week.

The Posting Process

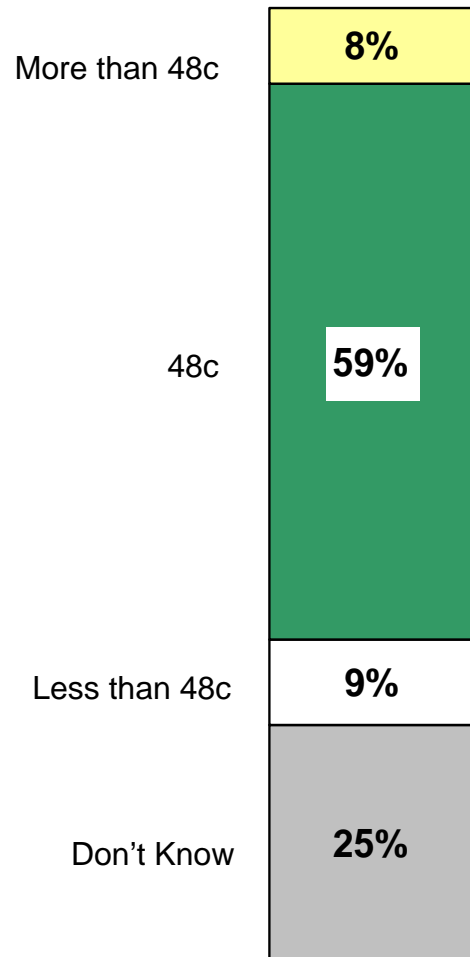
Satisfaction with An Post Postal Service

Base: All Respondents n= 1012 in 2006

- The lowest satisfaction score was with cost of sending 2kg package with just 44% either satisfied or very satisfied.
- Dubliners had the lowest overall satisfaction scores, with:
 - Time taken to deliver letters – 63% vs. 76% nationwide
 - Collection time – 56% vs. Rest of Leinster 80%
 - Accuracy of delivery – 65% vs. 78% nationwide
- Rest of Leinster had the highest satisfaction scores on average, with:
 - Time taken to deliver letters – 81%
 - Collection time – 80%
 - Accuracy of delivery – 85%

Cost of Sending a Standard Envelope with An Post

Base: All Respondents n= 1012 in 2006



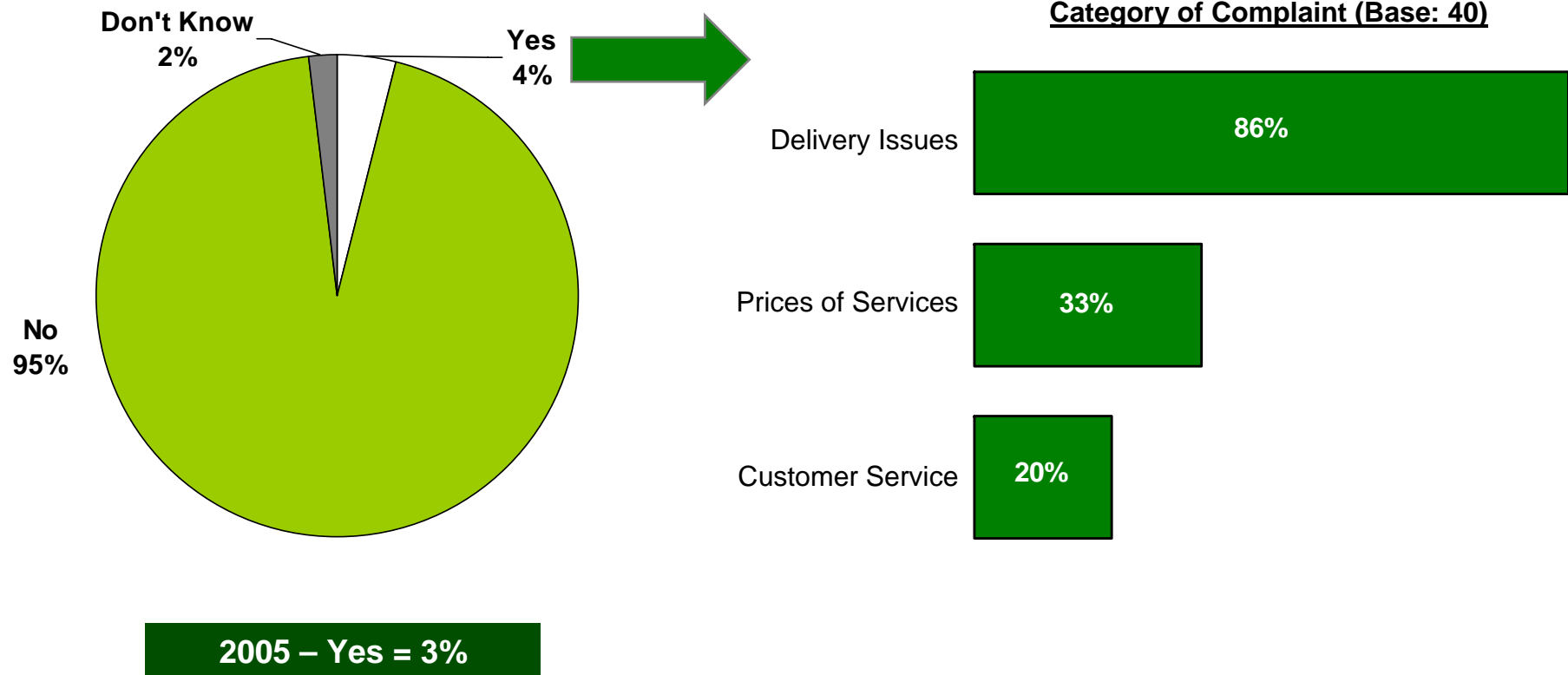
- Females (68%) more likely than males (50%) to know exact cost.
- Dubliners (63%) and Conn/Ulster (62%) more likely to know than Rest of Leinster (58%) and Munster (54%).
- ABC1s (65%) more likely to say 48c than C2DEs (54%).
- 15-24s below average knowledge (41% don't know)

Postal Complaints

Postal Complaints

Base: All Respondents n= 1012 in 2006

Note: Small Base



Postal Complaints

Base: All Respondents n = 40 in 2006

Note: Small Base

- Numbers who lodged a complaint is at 4% in 2006 compared to 3% in 2005. Of these, the majority were made by those located in Dublin.
- Complaints lodged were predominantly about delivery issues (89%), with complainants also having issues about prices (20%) and customer service (33%). (Note: Multiple responses were allowed for this question.)
- Only 19% were satisfied with the handling of their complaint, with 43% dissatisfied and 38% neither satisfied nor dissatisfied.
- In all instances complaints were made to the relevant operator, with 92% of all complaints being about An Post.

Postal Complaints

Base: All Respondents n = 40 in 2006

Note: Small Base

- Other bodies that complaints were lodged to include:
 - Consumer Association of Ireland – 17%
 - Ombudsman – 13%
 - Office of Consumer Affairs – 8%
 - Citizens Advice Bureau – 2%
- An additional 8% complained to ComReg

Key Findings from Results

Key Findings from Results

Postal Items Sent

- Personal letters and gifts to friends/relatives are the most common type of mail sent (72%), with 42% sending letters to businesses.
- The average amount of mail sent has decreased from 4.69 items per week to 3.06. This decrease in volume is evident across all socio-demographic groups, as well as among those who run a business from home.
- Those with home Internet access send more items (3.87) than those without (2.47), while ABC1s send more (3.58) than C2DEs (2.58).
- Those located in Dublin send less items per week (2.64) than average, while those in the Rest of Leinster (3.67) send more than average.
- Awareness of alternative postal operators is up from 30% in 2005 to 47% in 2006.
- This increase is reflected across all types of consumer although there have been some interesting changes since 2005, with the 35-44 age-group more aware than before as well as an increase in awareness among those aged 65-74.
- C1s are now more likely to be aware of alternatives than they would have been in 2005.

Key Findings from Results

Postal Items Delivered

- The average number of mail items received is down from 9.36 to 8.11 per week.
- Again this decrease is evident across all groups of the population, although there are some differences between regions, among social classes and for older consumers.
- Nearly 1 in 10 consumers (9%) receives international mail.
- 24% saw an increase in personal mail, while 15% noted a rise in mail from businesses.
- 25% noticed an increase in addressed direct mail, while 39% saw an increase in unaddressed mail.
- 53% claim to know the frequency of mail delivery to their home. 29% say that they receive mail every day, while 24% receive mail 2-3 times a week.

Key Findings from Results

The Posting Process

- The lowest level of satisfaction with elements of the postal service was recorded with regards to the cost of sending a 2kg package – only 44% are at least somewhat satisfied.
- Dublin consumers have the lowest satisfaction scores for time taken to deliver letters, collection time and accuracy of delivery. Consumers in Leinster (excluding Dublin) had higher scores across these factors and on average than other areas.
- Almost 6 in 10 (59%) are aware of the cost of posting a standard envelope with An Post, with some differences in terms of awareness levels between social classes and regions. Males are less aware of the cost than females, and 15-24s are the least likely age-group to have any idea of the cost.

Key Findings from Results

Postal Complaints

- 4% of consumers have made a complaint about the postal service in the last 12 months.
- Complaints were mainly regarding delivery issues, but there was also some incidence of complaints about prices and customer service issues.
- Only 19% of those who lodged a complaint were satisfied with the way in which that complaint was handled.

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Appendix: Methodology

Methodology

- 1008 Q3 2005 and 1012 Q3 2006 individuals surveyed aged 15–74.
- Fieldwork conducted: Q3 2005 August 8th – September 1st
Q3 2006 August 16th – September 13th
Callback 1 conducted Nov/Dec 2006
Callback 2 conducted Jan 2007
- 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, with the callbacks being conducted by CATI (phone) interviewing.
- Given the sample size, there is a margin of error of +/-3% on the full base sample size.