Consumer Postal Users Survey

Document No. 13/67b

9 July 2013

Commission for Communications Regulation

Ipsos MRBI

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Introduction

Background & Objectives

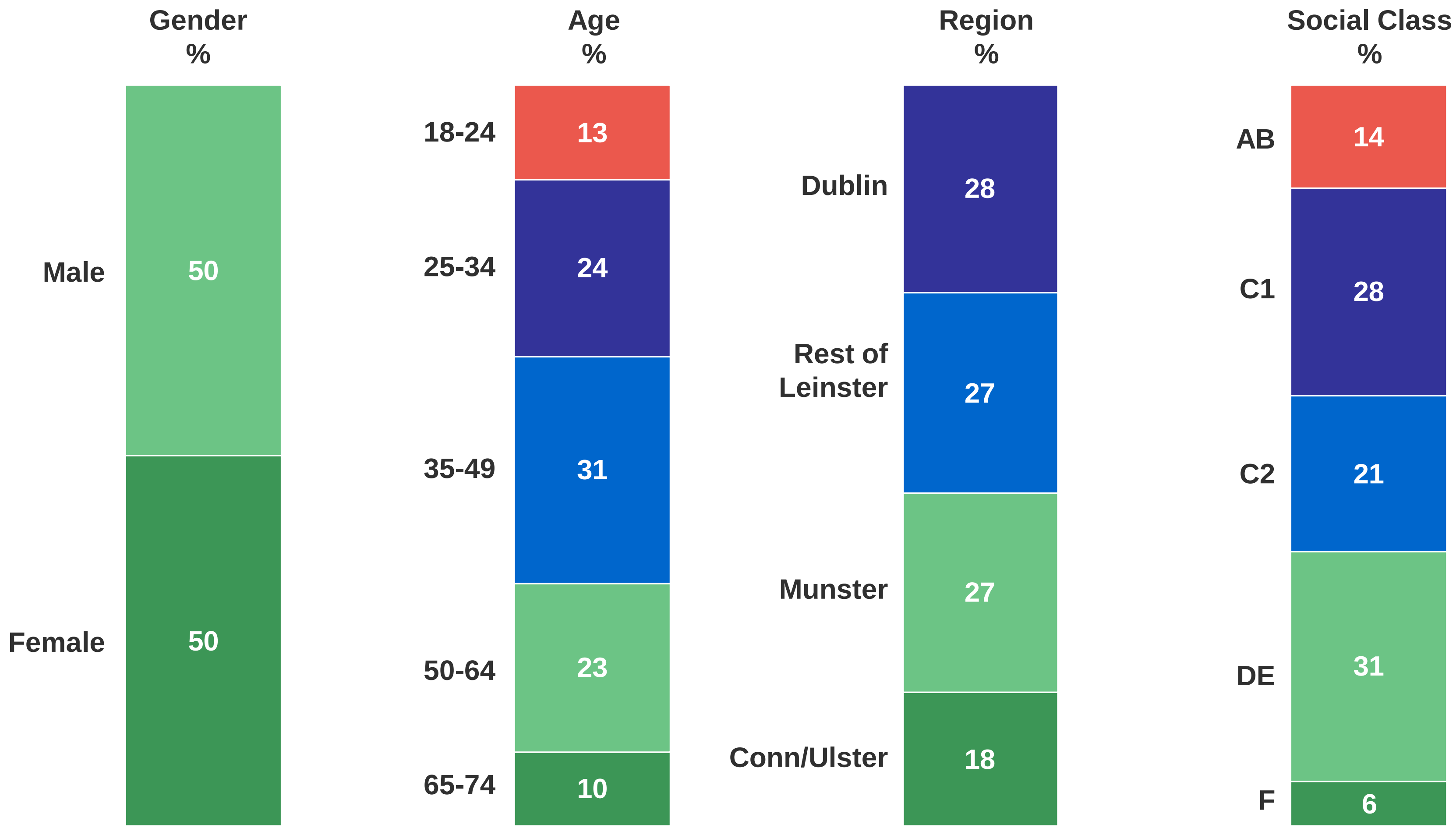
- ComReg would like to update its understanding of the residential postal market post liberalisation.
- It commissioned Ipsos MRBI to conduct a nationally representative survey of adults aged between 18 and 74 years.
- The objectives of this research are to understand trends in the following areas:
  - Usage and awareness of postal services providers
  - Attitudes to the postal service
  - Complaints experience
  - Support for the introduction of postcodes
  - Online versus paper billing

Research Methodology

- A quantitative face-to-face approach was adopted amongst a nationally representative sample of adults aged between 18 and 74 years throughout the Republic of Ireland.
- A total sample of 1,000 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.
- Face-to-face fieldwork was conducted between 16th & 29th May, 2013.
- No comparisons with previous surveys are possible due to significant changes in the questionnaire used.

Analysis of Sample

Analysis Of Sample



Base: All Respondents: 1,000

Social Class Definitions

A	These are professional people, very senior managers in business or commerce or top-level civil servants.
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.
C1	Junior management, owners of small establishments, and all others in non-manual positions. Jobs in this group have very varied responsibilities and educational requirements.
C2	All skilled manual workers, and those manual workers with responsibility for other people.
D	All semi-skilled and unskilled manual workers, and apprentices and trainees to skilled workers.
E	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
F	Farmers or farm managers of holdings of less or more than 50 acres

Findings

Post Received

Type of Post Received

Q.1 For each of the following types of post, please tell me when was the last time you received that type of post to your home?

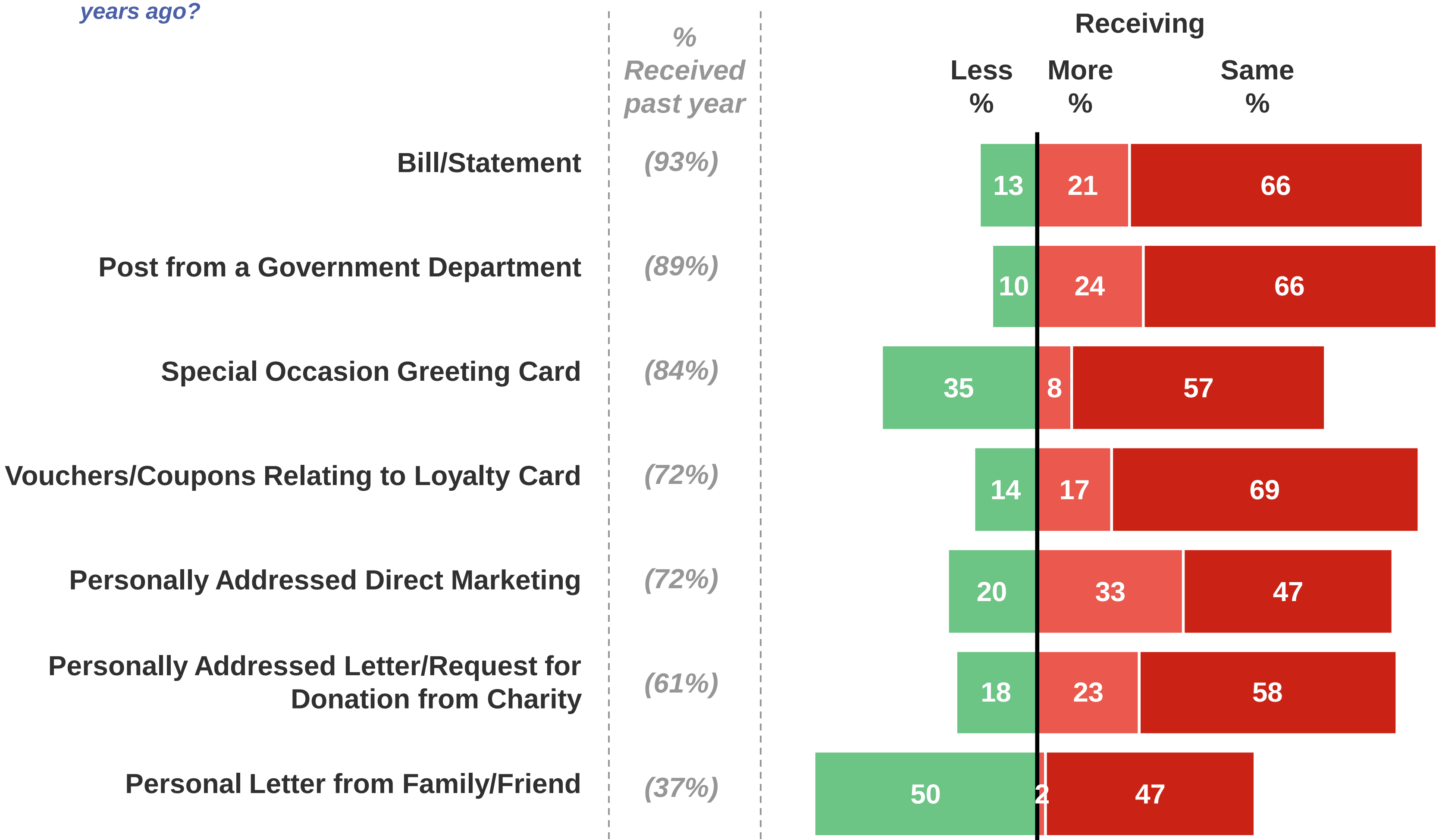
	Past week	Past month	Past year	Longer ago	Past year (Net)
	%	%	%	%	%
Bill//statement	40	50	4	7	93
Post from a Government department	15	47	27	10	89
Special occasion greeting card	12	29	43	16	84
Vouchers/coupons relating to loyalty card	11	39	23	27	72
Personally addressed direct marketing	24	29	18	28	72
Personally addressed letter/ request for donation from charity	10	20	31	38	61
Personal letter from family/ friend	6	11	20	63	37

Bills/ statements and post from Government departments are the top items received (93% and 89% of respondents in the past year), with bills/ statements the most frequently received item (40% in the past week).
Around 1 in 4 have also very recently received personally addressed direct marketing.

Base: All Respondents: 1,000

Change in Post Received Compared to Five Years Ago

Q.2 And for each of these types of post, please tell me if you are receiving more, less or about the same amount compared to say five years ago?

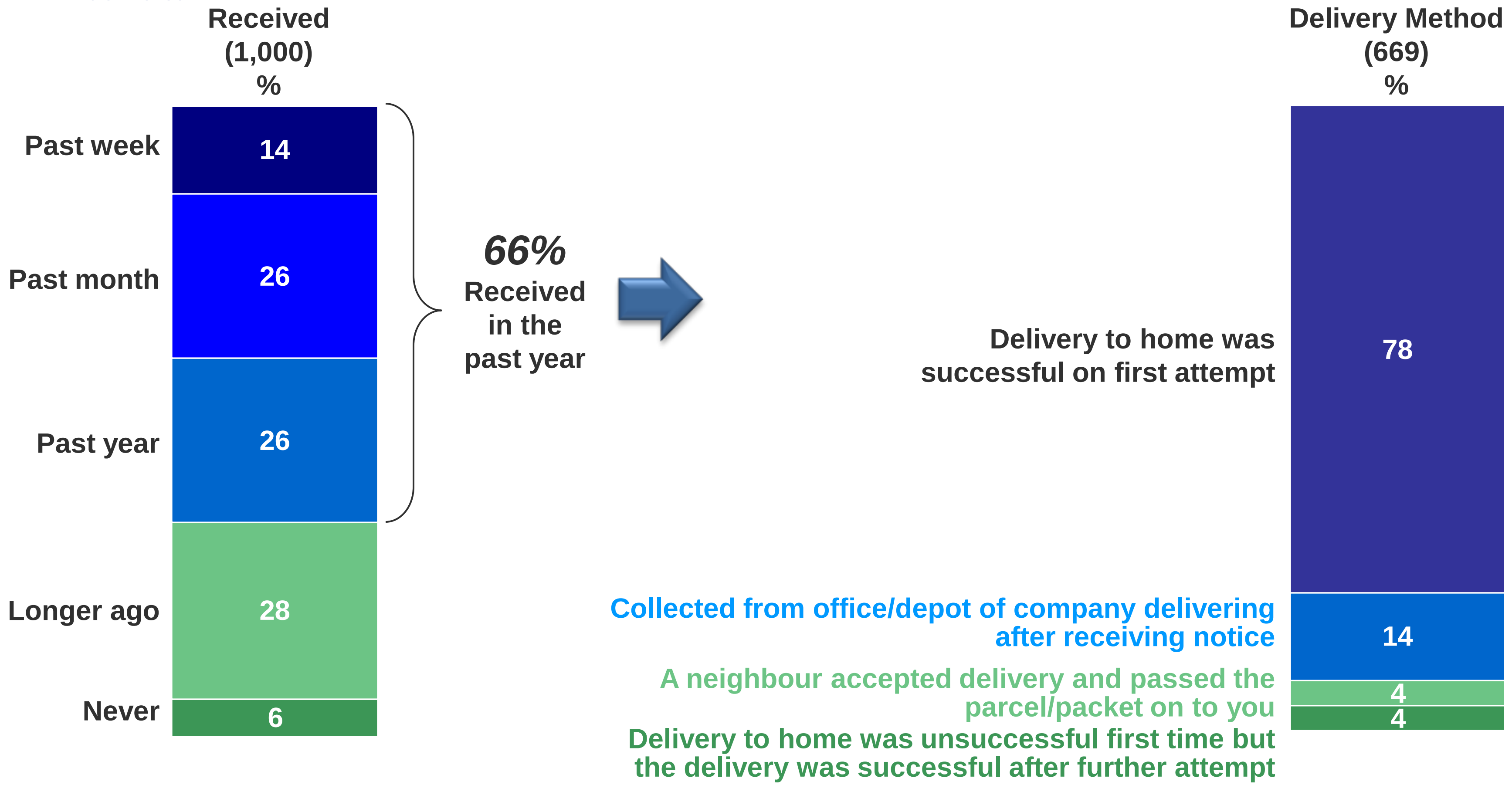


Items from family/ friends have seen relatively larger declines over the past five years. Half of respondents claim they are receiving fewer personal letters whilst just over one third say they are receiving fewer greeting cards.

Last Time A Personally Addressed Parcel/ Packet Was Received

Q.3 When was the last time you received a personally addressed parcel or large packet to your home? By parcel or packet I mean it was of a size that it would not fit through a letterbox, for example a medium sized Jiffy bag or larger.

Q.4 Thinking about the last parcel or large packet that was addressed to you at home, which of these best describes how it was delivered?



66% have received a parcel or packet in the past year & 40% have received a parcel or packet in the past month. Amongst recipients who have received a parcel or packet in the past year, over three quarters (78%) claimed their most recent delivery was successfully made on the first attempt, whilst 14% had to collect it from an office or depot after receiving a notice.

Base: All Respondents: 1,000

Company That Delivered Parcel/Packet

Q.5 Do you recall or know which company delivered this parcel/packet?

		Delivery Success			
	Total	**Successful on 1st attempt**	**Not successful on 1st attempt**	**Collected from office/depot**	**Neighbour took delivery**
	(669)	(525)	(30)*	(89)	(24)*
	%	**%**	**%**	**%**	**%**
An Post	75	77	63	77	37
Fastway Couriers	8	8	3	5	15
Eirpost	*	*	-	1	-
Dx Ireland	*	*	-	-	-
Lettershop Postal	-	-	-	-	-
TiCO Mailworks	-	-	-	-	-
Another Company	9	8	6	13	17
Can't recall	8	6	29	4	30

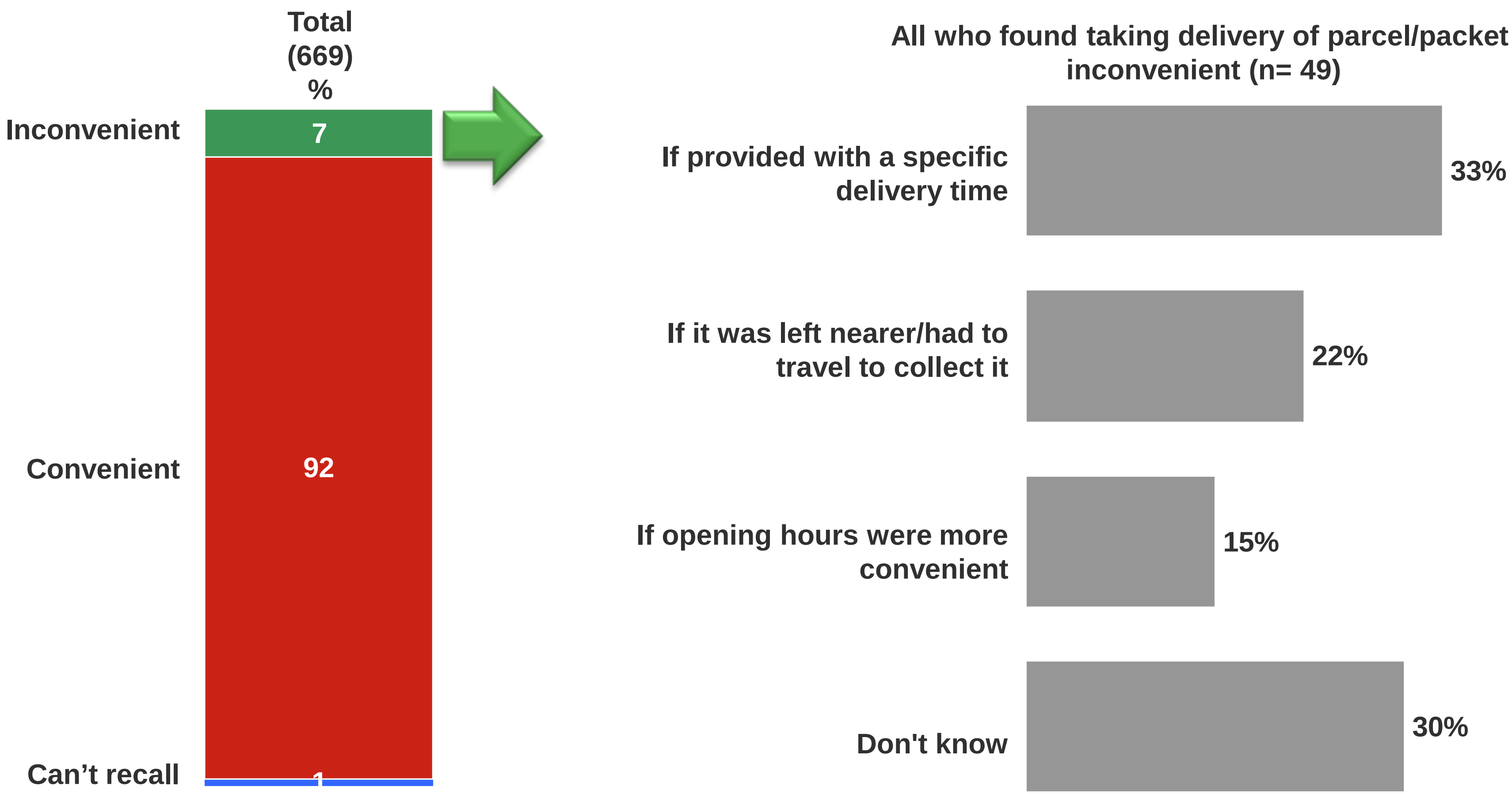
75% claim the parcels/ packets they most recently received were delivered were by An Post. Fastway Couriers is the only other significant operator recalled by 8%.

** Caution Small Base Size*

Base: All who received a parcel/packet in past year: 669

Convenience Of Taking Delivery Of Parcel/ Packet

Q.6 Did you find taking delivery of this parcel/packet convenient or inconvenient?
Q.7 How could it have been made more convenient for you? Any other ways? (SPONTANEOUS)



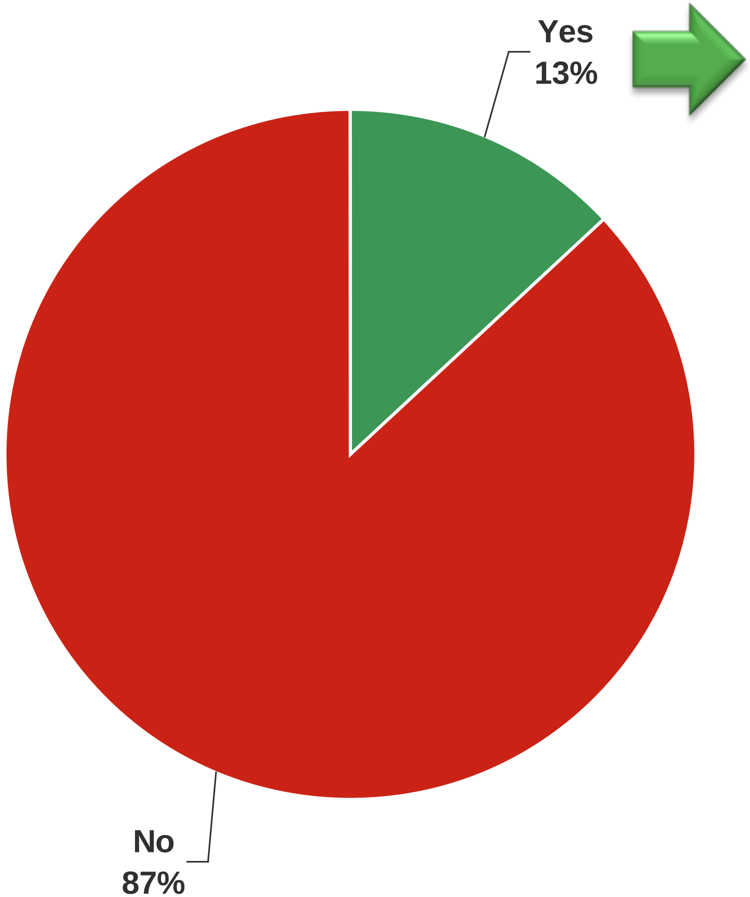
The vast majority (92%) considered taking delivery of this parcel/ packet to be convenient, with a small proportion (7%) stating it was inconvenient – amongst this group the provision of a specific delivery time was cited as most desirable.

** Caution Small Base Size*

Base: All who received a parcel/packet in the past year

Parcel Delivered To Place Of Work In Past Year

Q.8 In the past year, have you had a parcel/ large packet delivered to your place of work because there may not have been anybody at home to take delivery?



Male	13%
Female	12%
Dublin	16%
Rest of Leinster	12%
Munster	13%
Connaught/Ulster	8%
ABC1	19%
C2DE	7%
F	8%

ABC1's are significantly more likely to have a parcel delivered to their place of work than other socio-econmic groups.

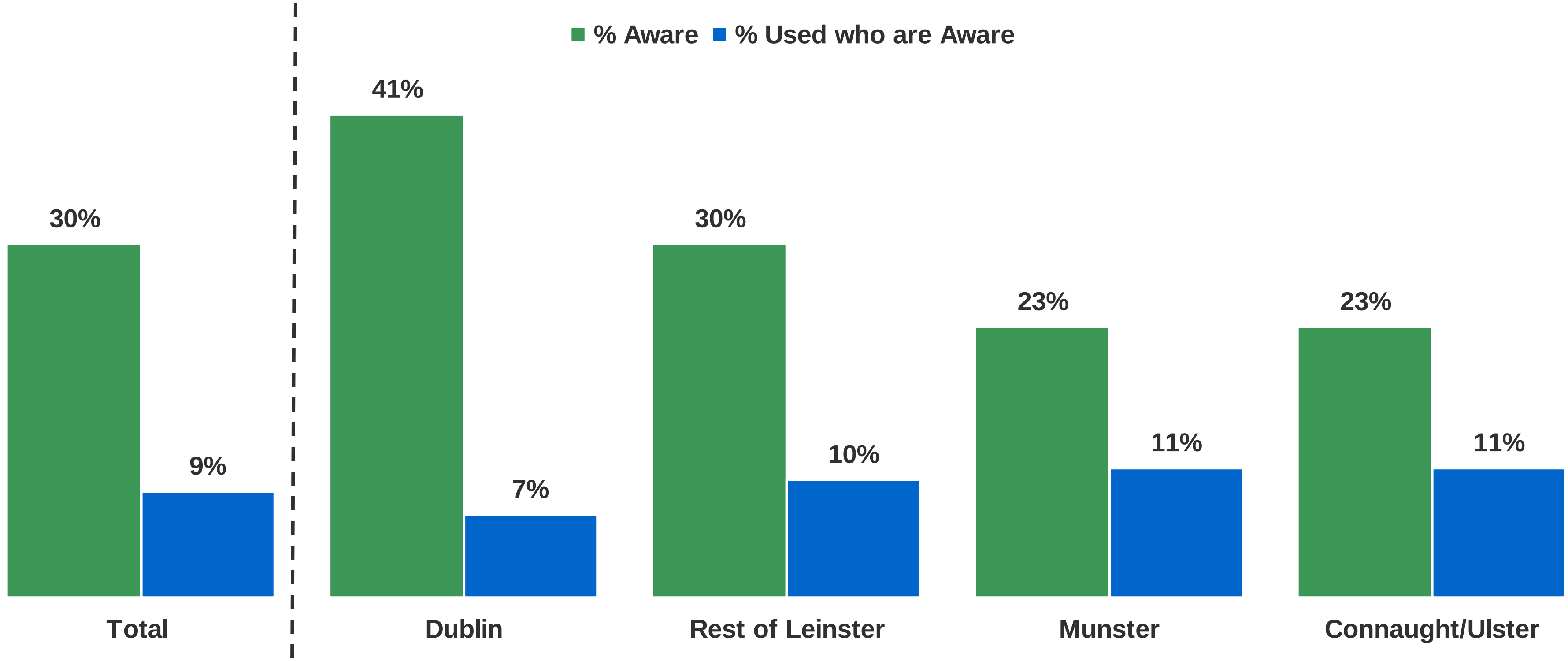
Base: All Employed Respondents: 414

Parcel Lockers

Awareness and Usage Of Parcel Lockers

Q.9 Are you aware of the availability of 'Parcel Lockers' in some parts of Ireland where packets/parcels are delivered to a locker for collection e.g. "Parcel Motel" by Nightline or "Parcel Xchange" by DX?

Q.10 Have you used this Parcel Locker service in the past year, or not?



Conversion of Awareness into Usage

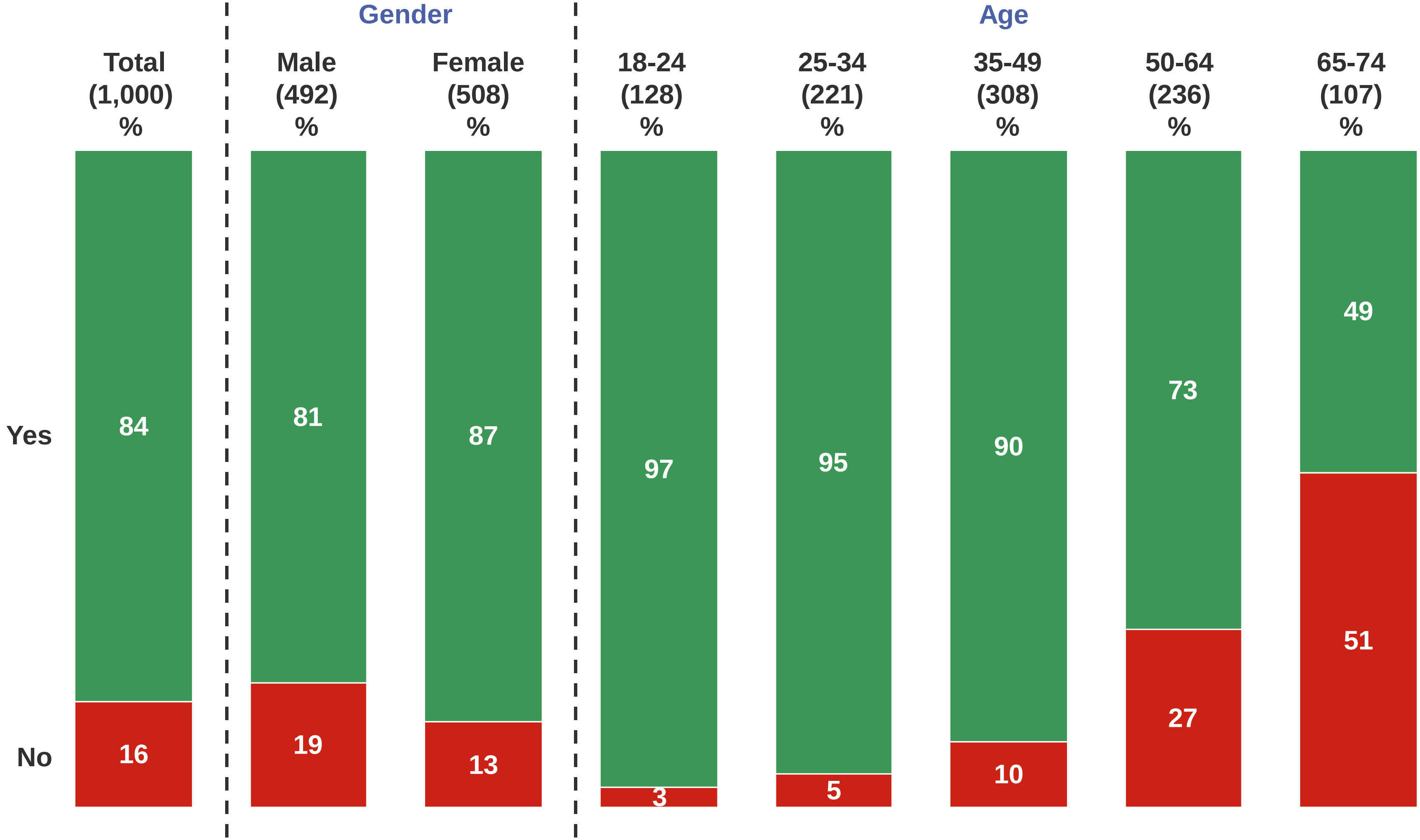
30%	17%	33%	48%	48%

Awareness of parcel lockers is significantly higher amongst Dublin respondents however they are much less likely to have used the service compared to both Munster and Conn/Ulster who punch above their weight in terms of usage.

Base: All Respondents: 1,000 / All Respondents Aware: 300

Any Internet Access – I

Q.11 Do you have access to the internet at home, work, on your phone or elsewhere or do you not have access to the internet?

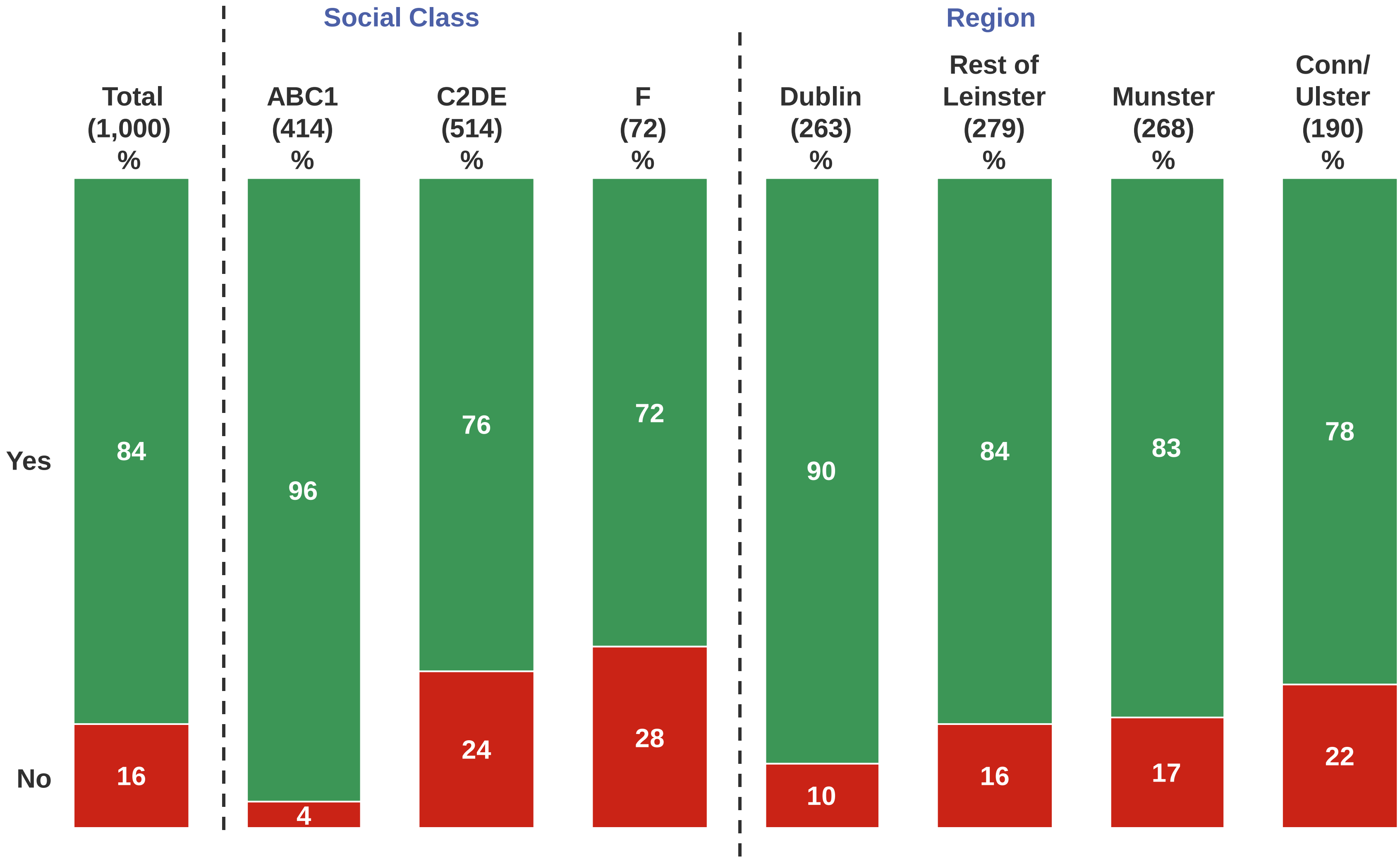


Internet access is highest amongst those aged 18-49 years.

Base: All Respondents: 1,000

Any Internet Access – II

Q.11 Do you have access to the internet at home, work, on your phone or elsewhere or do you not have access to the internet?

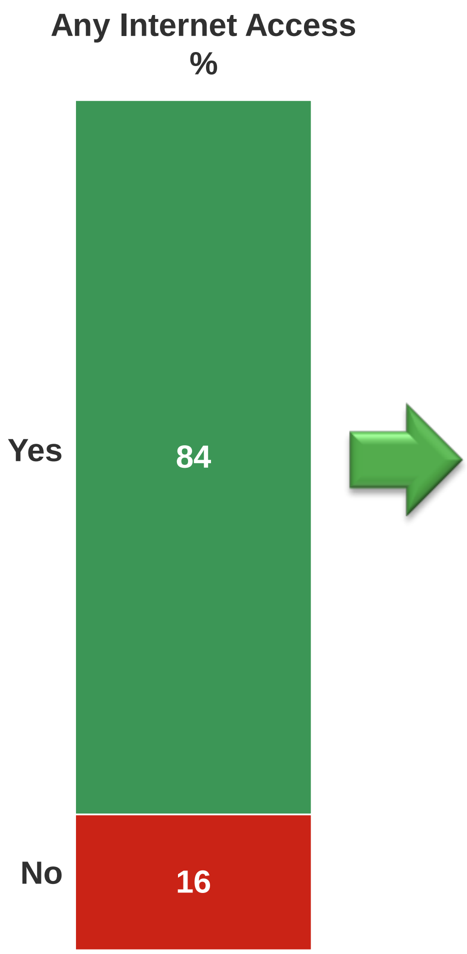


Internet access is highest amongst ABC1's (96%) and those living in Dublin (90%).

Base: All Respondents: 1,000

Internet Access & Ordering Online

Q.11 Do you have access to the internet at home, work, on your phone or elsewhere or do you not have access to the internet?
Q.12 When was the last time you ordered goods online that required delivery or have you never ordered goods online?



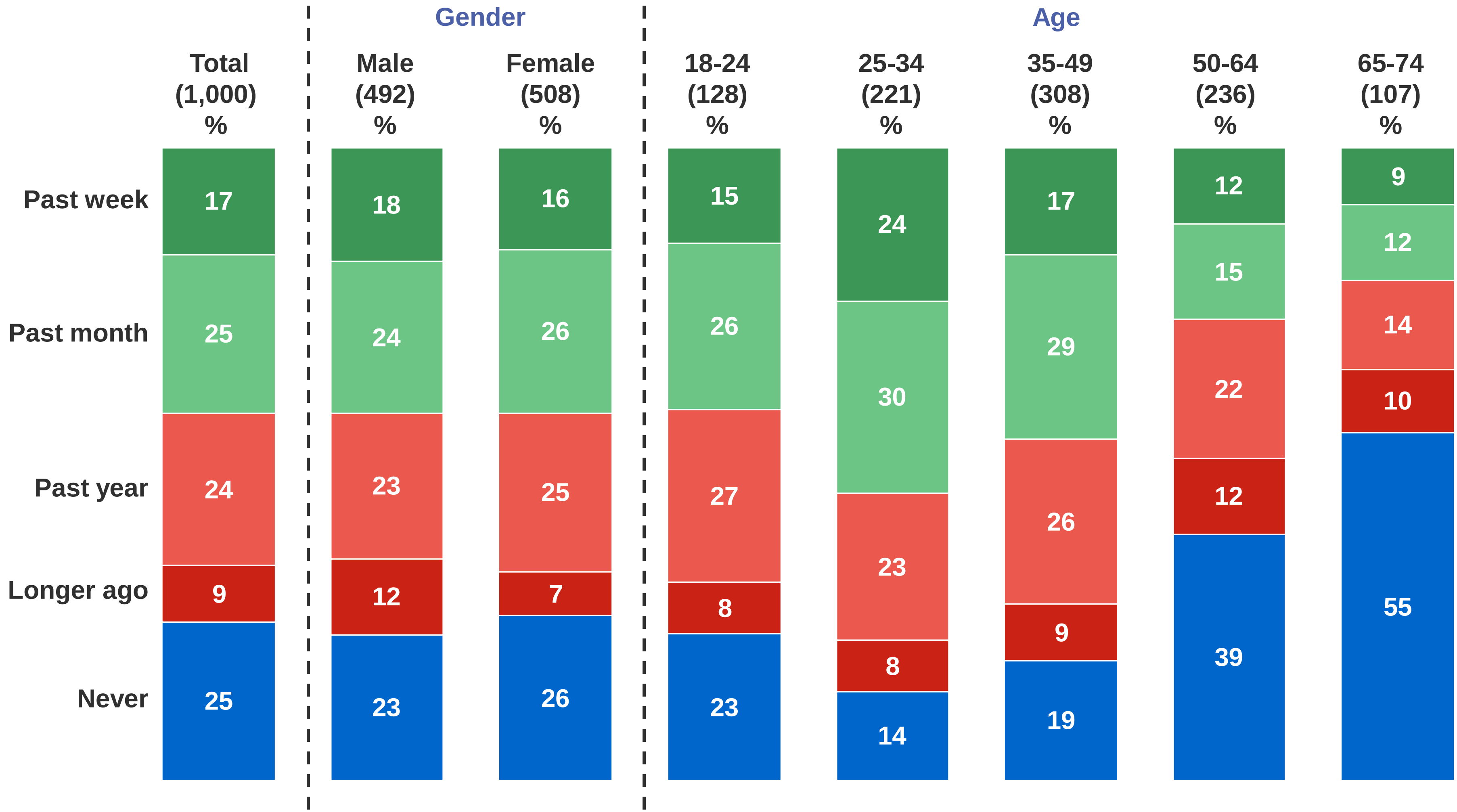
42% of those with internet access have ordered goods requiring delivery within the past month (or 35% of all respondents).

Base: All Respondents: 1,000

Base: All who have internet access: 839

Last Time Ordered Goods Online – I

Q.12 When was the last time you ordered goods online that required delivery or have you never ordered goods online?

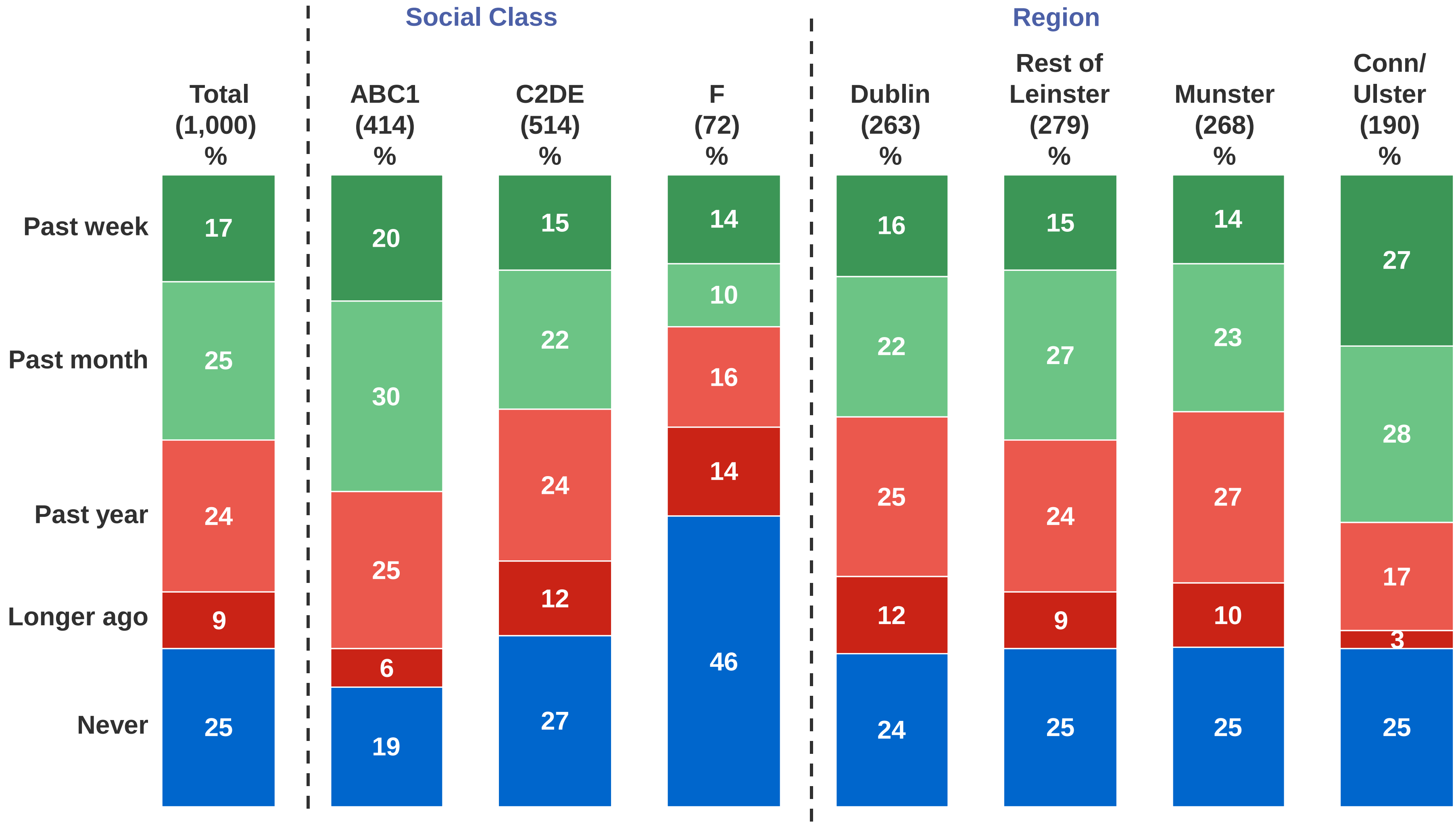


Almost one quarter of 25-34 year olds have placed an online order in the past week and over half have placed an order in the past month (54%).

Base: All Respondents: 1,000

Last Time Ordered Goods Online – II

Q.12 When was the last time you ordered goods online that required delivery or have you never ordered goods online?

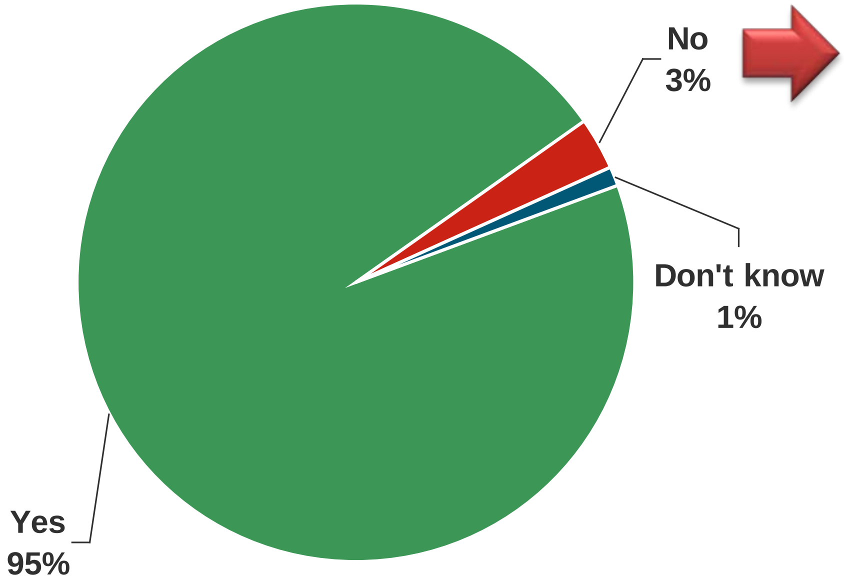


C2DE's & F's are most likely to have never placed an order online.

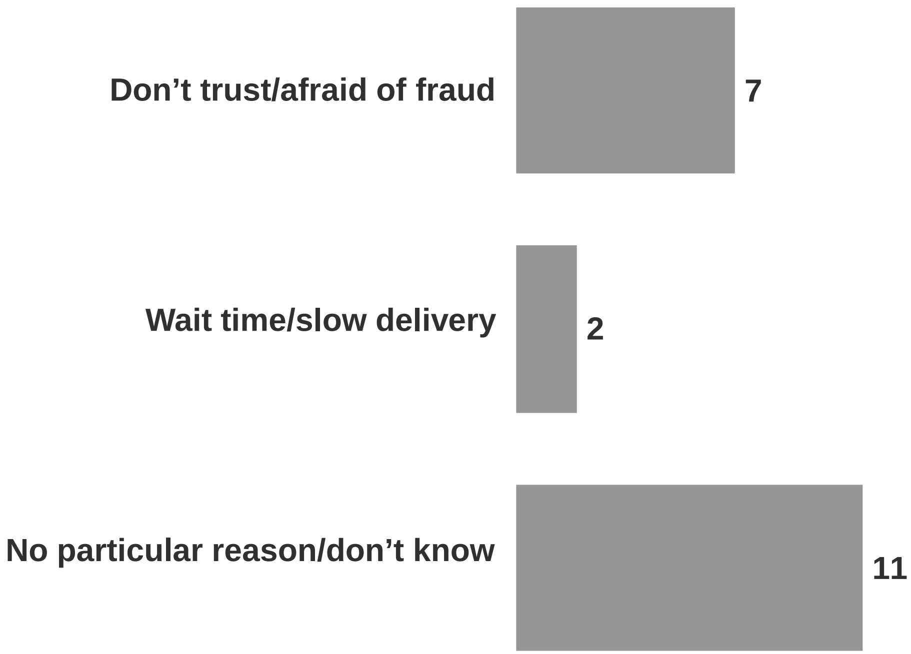
Base: All Respondents: 1,000

Ordering Online in the Future

Q.12(a) And would you order goods online, that require delivery, again?
Q.12(b) And what is the main reason why you would not order goods online that require delivery? (SPONTANEOUS)



Reasons Would Not Order Goods Online Again
(Raw No's)



Only 3% would not order goods online again, with trust/ fear of fraud the main reason given.

Base: All who have ordered goods online: 630

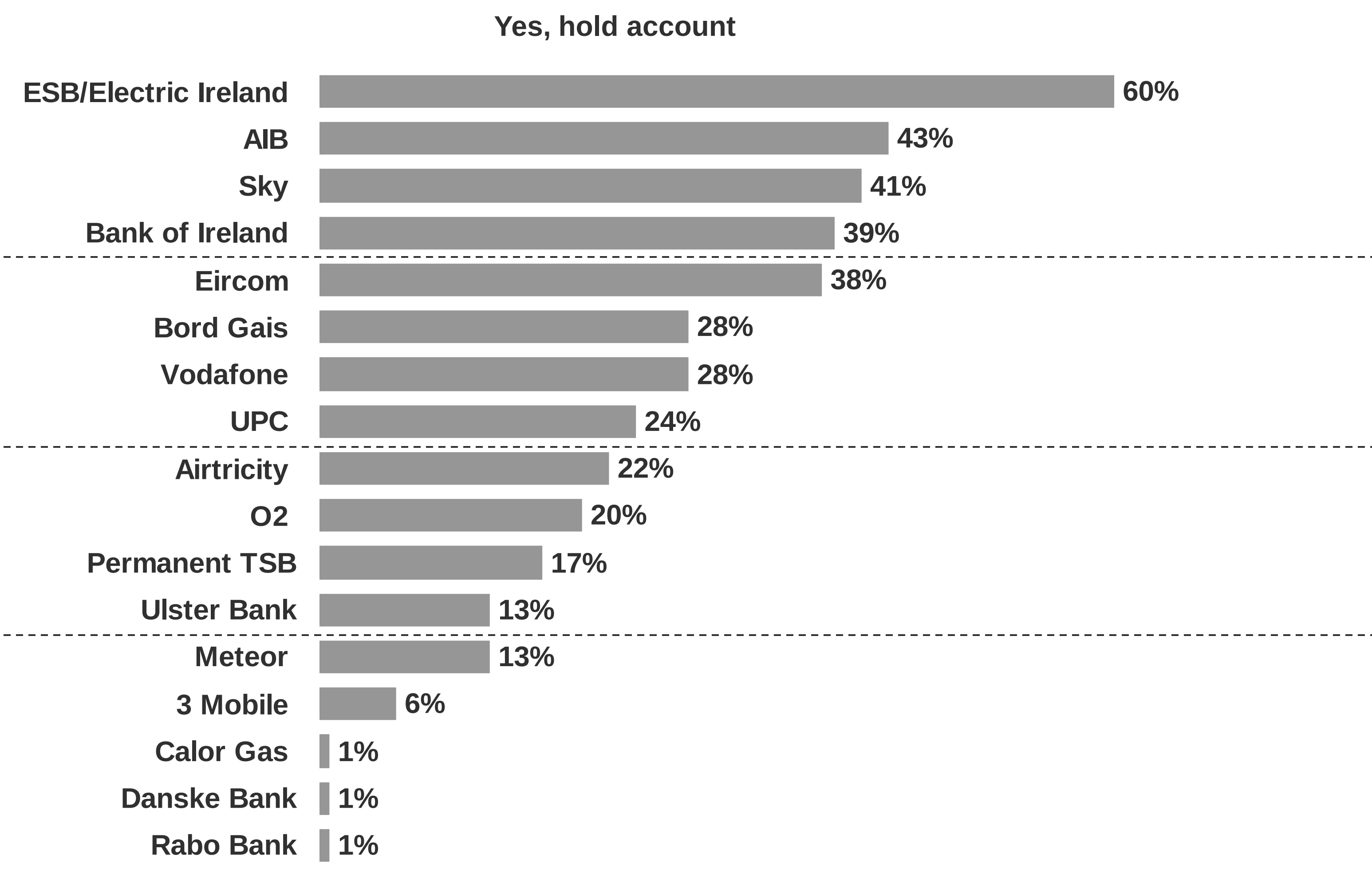
Base: All who would not order goods online, for delivery again: 20*

** Caution Small Base Size*

Bills & Statements

Companies Account Holding

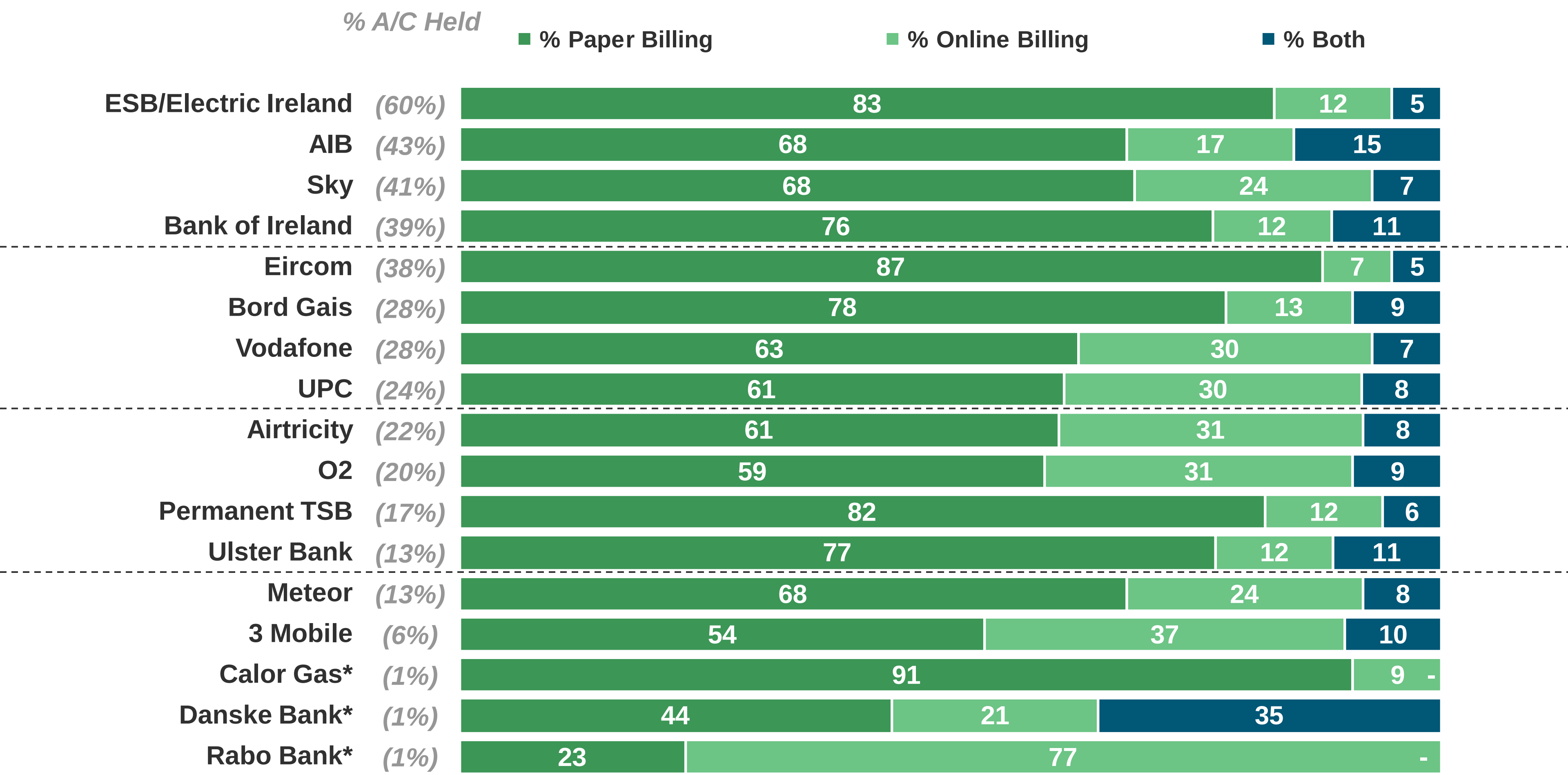
Q.13 I'd like to ask about how you receive your bills and statements. For each of the following companies, please tell me if you, on your own or jointly with someone else, have an account with that company, or not?



Base: All Respondents: 1,000

Format of Statements Received

Q.14 And do you get a paper bill/statement in the post from ……….. (COMPANY) or are your billing and statements only online, or do you get both?



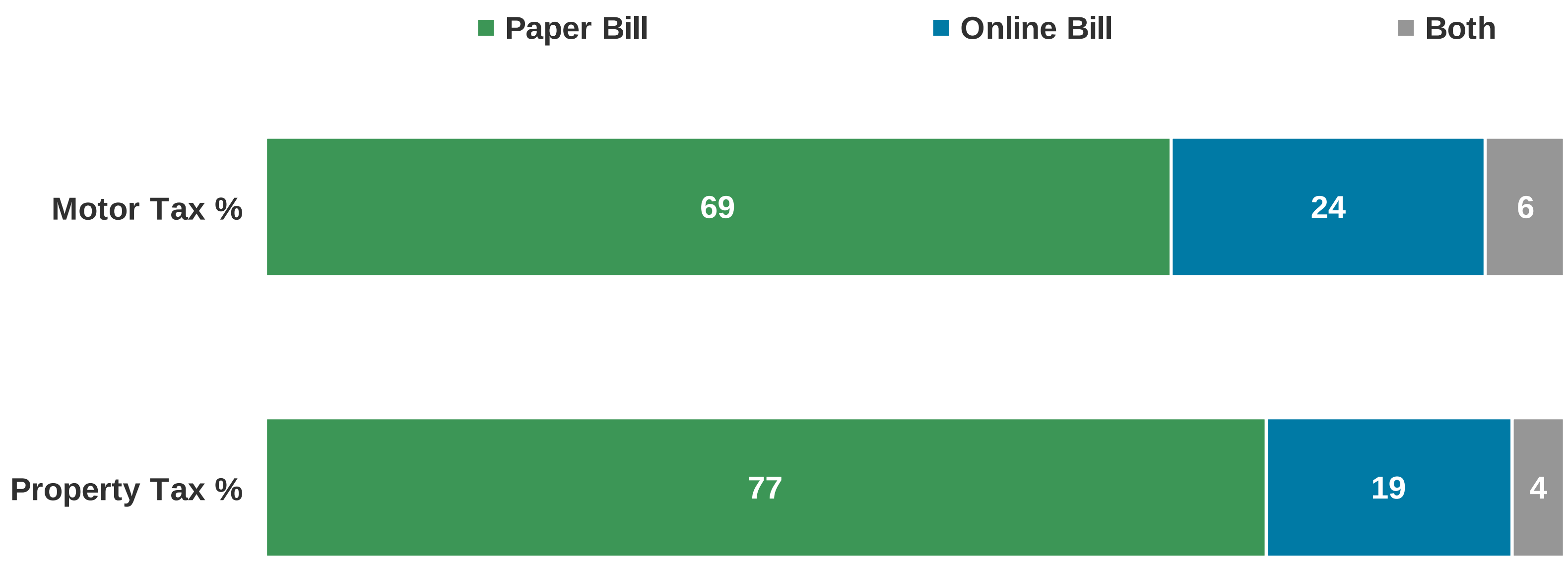
Technology companies (mobile telecommunications, entertainment) are most likely to be using online billing.

**Caution Small Base Size*

Base: All with account (either personal or joint)

Tax Related Bills & Statements

Q.14(a) Now I'd like to ask about how you receive your tax related bills/statements. For each one please tell me do you get a paper bill/statement in the post or are your billing and statements only online?

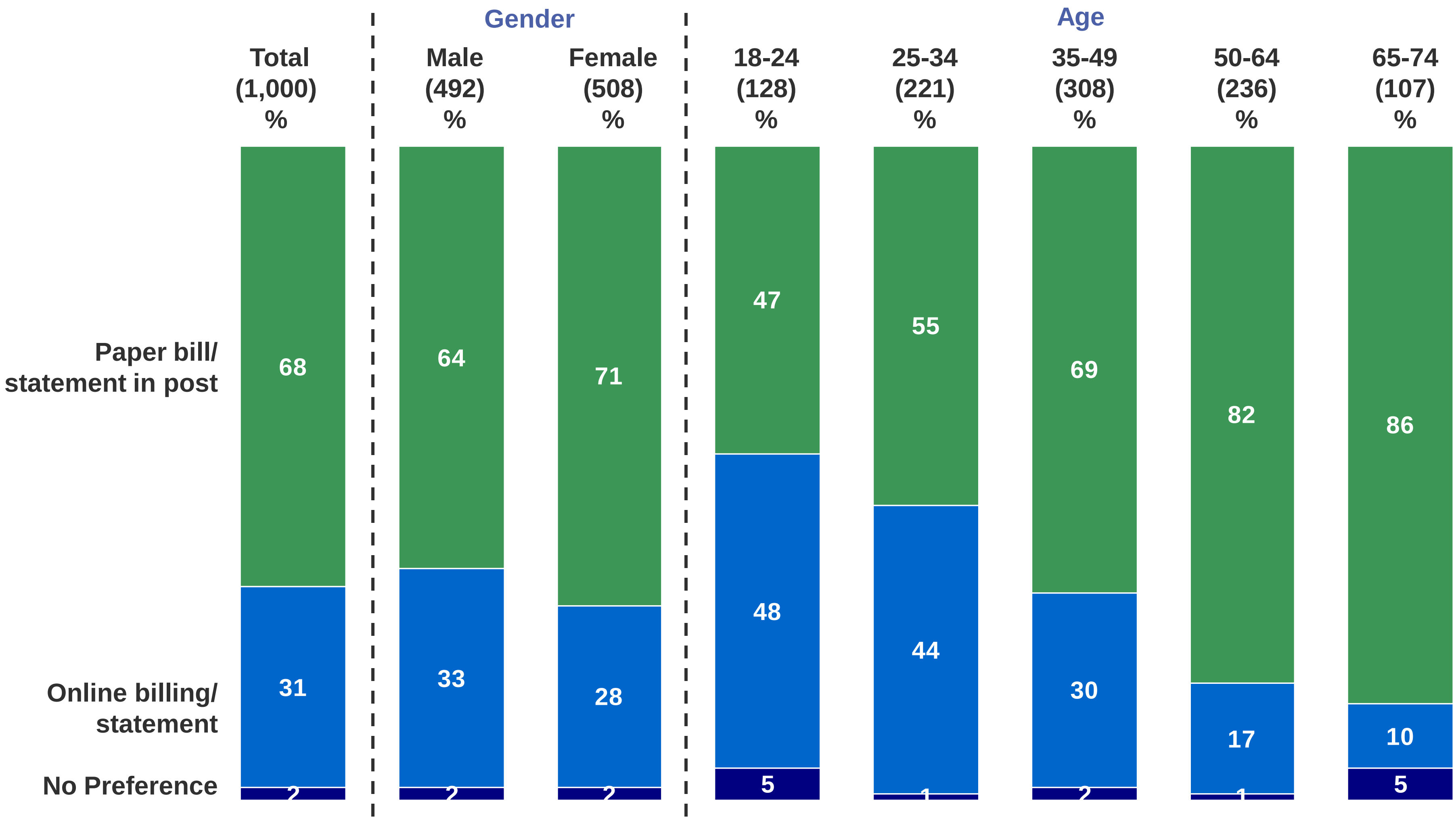


Of those for whom motor tax is relevant (83% of all respondents) just one quarter claim to receive online billing only. Of those for whom property tax is relevant (67%), one fifth claim to receive online billing only.

Base: All Respondents taxes are relevant to: Motor 835 ; Property 680

Preference For Receiving Bills/Statements (I)

Q.15 In general, what would be your preference for receiving bills/statements?

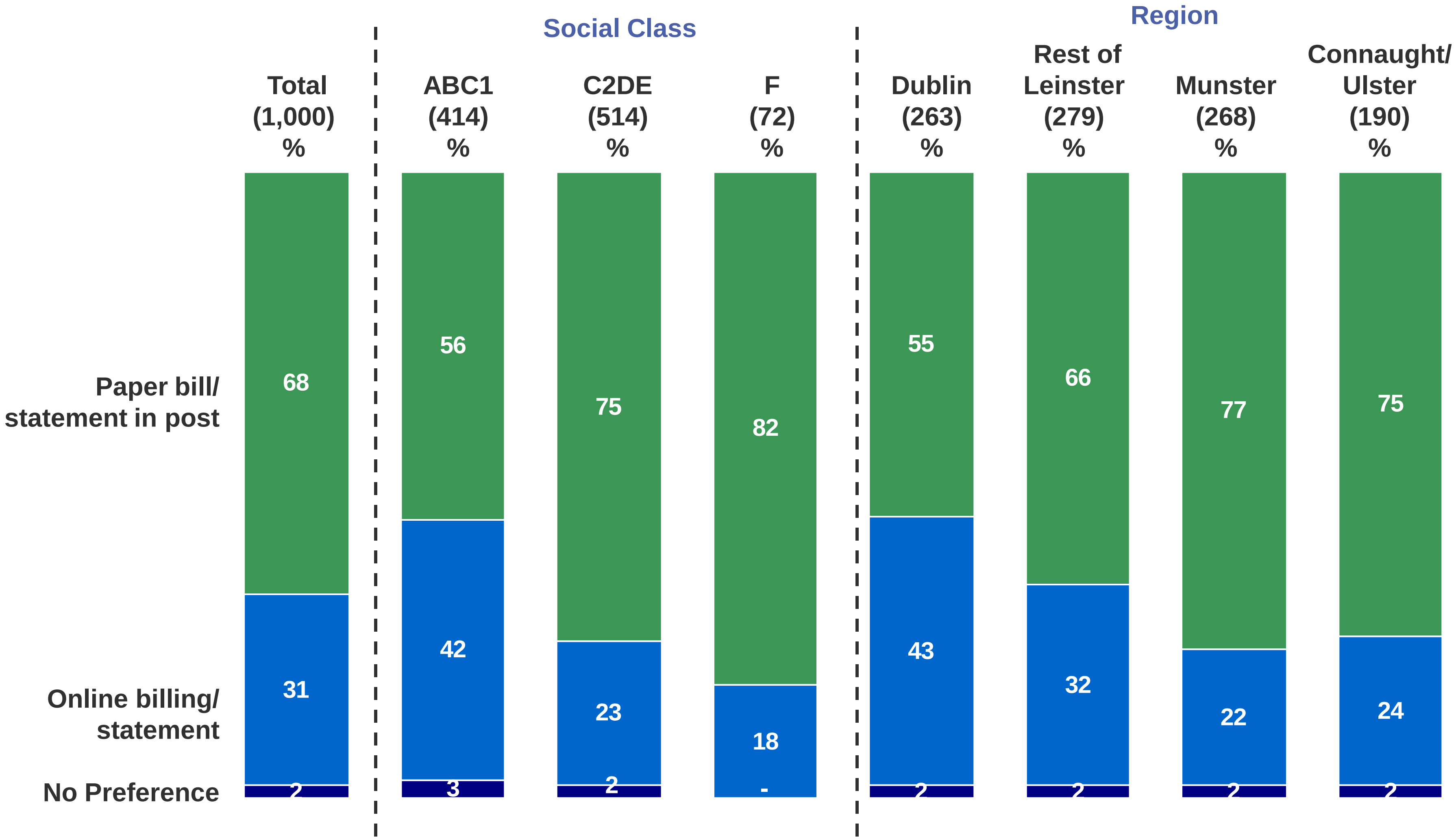


Around two thirds of respondents prefer receiving paper bills or statements via the post.
This preference is significantly higher amongst females, those aged 50years +.

Base: All Respondents: 1,000

Preference For Receiving Bills/Statements (II)

Q.15 In general, what would be your preference for receiving bills/statements?

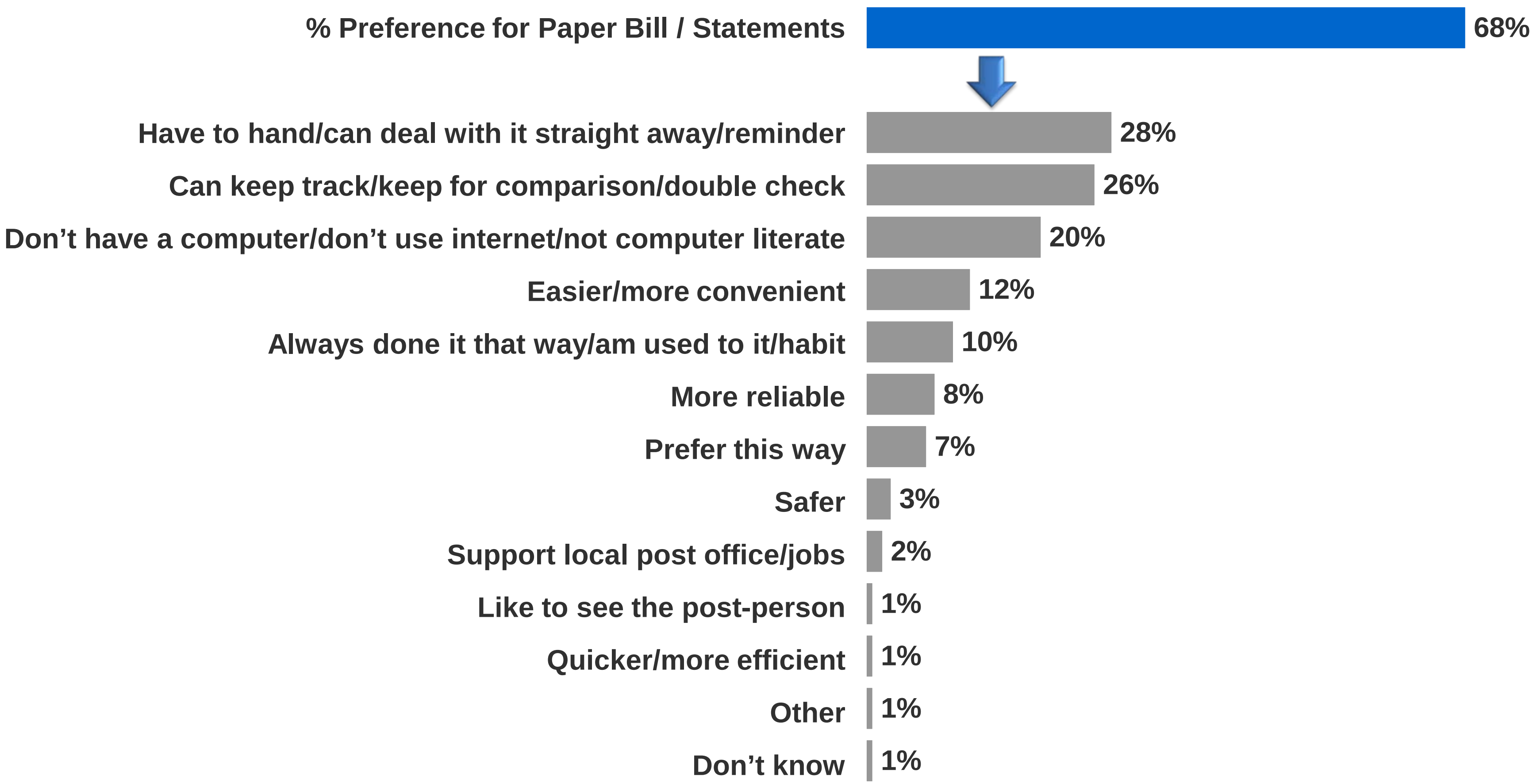


Around two thirds of respondents prefer receiving paper bills or statements via the post.
This preference is significantly higher amongst those living in Munster and Connaught/ Ulster.

Base: All Respondents: 1,000

Reasons For Preferring Paper Bills & Statements

Q.16 Why would this be your preference? (SPONTANEOUS)

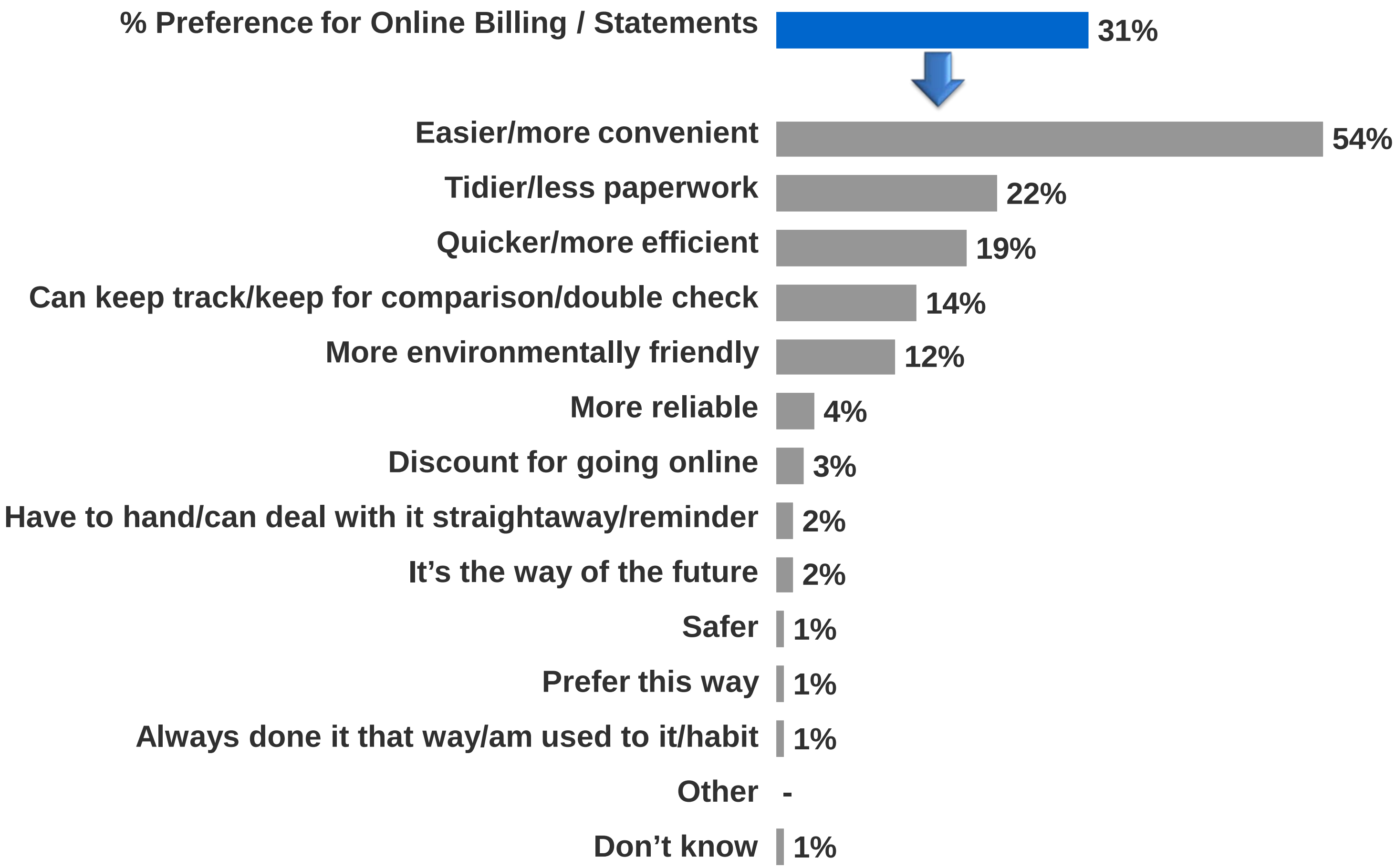


Respondents value the physical nature of having paper bills - they serve as a reminder and/ or as a means for tracking/ comparison. Lack of access to a computer or the internet is also a key factor.

Base: All who would prefer paper bills/statements: 680

Reasons For Preferring Online Billing & Statements

Q.16 Why would this be your preference? (SPONTANEOUS)

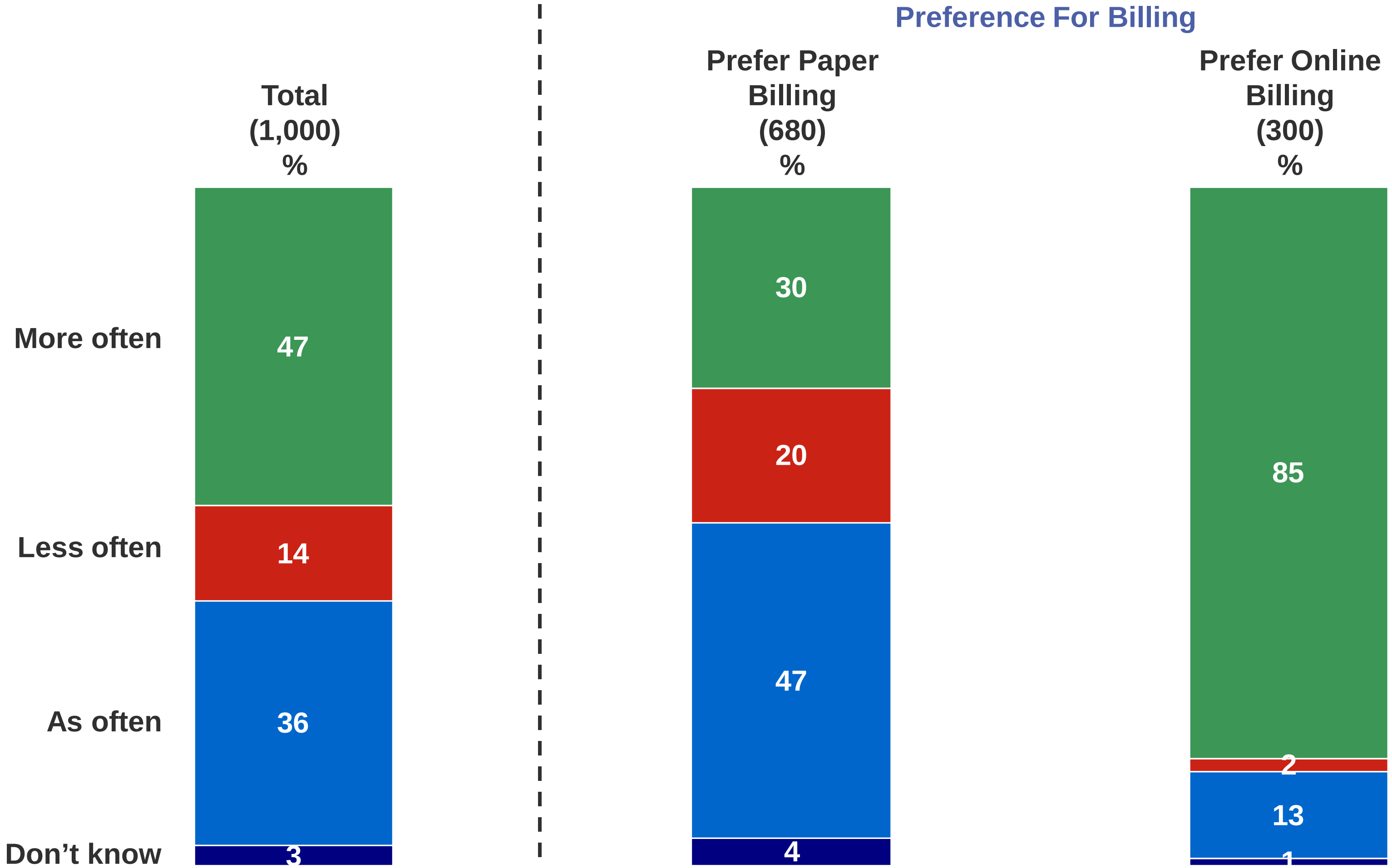


Ease of use and convenience dominates as the key reason for preferring online statements/ billing.

Base: All who would prefer online billing: 300

Using Online Billing In The Years Ahead

Q.17 In the years ahead, do you think you will be using online billing more often, less often or about as often as you do currently?



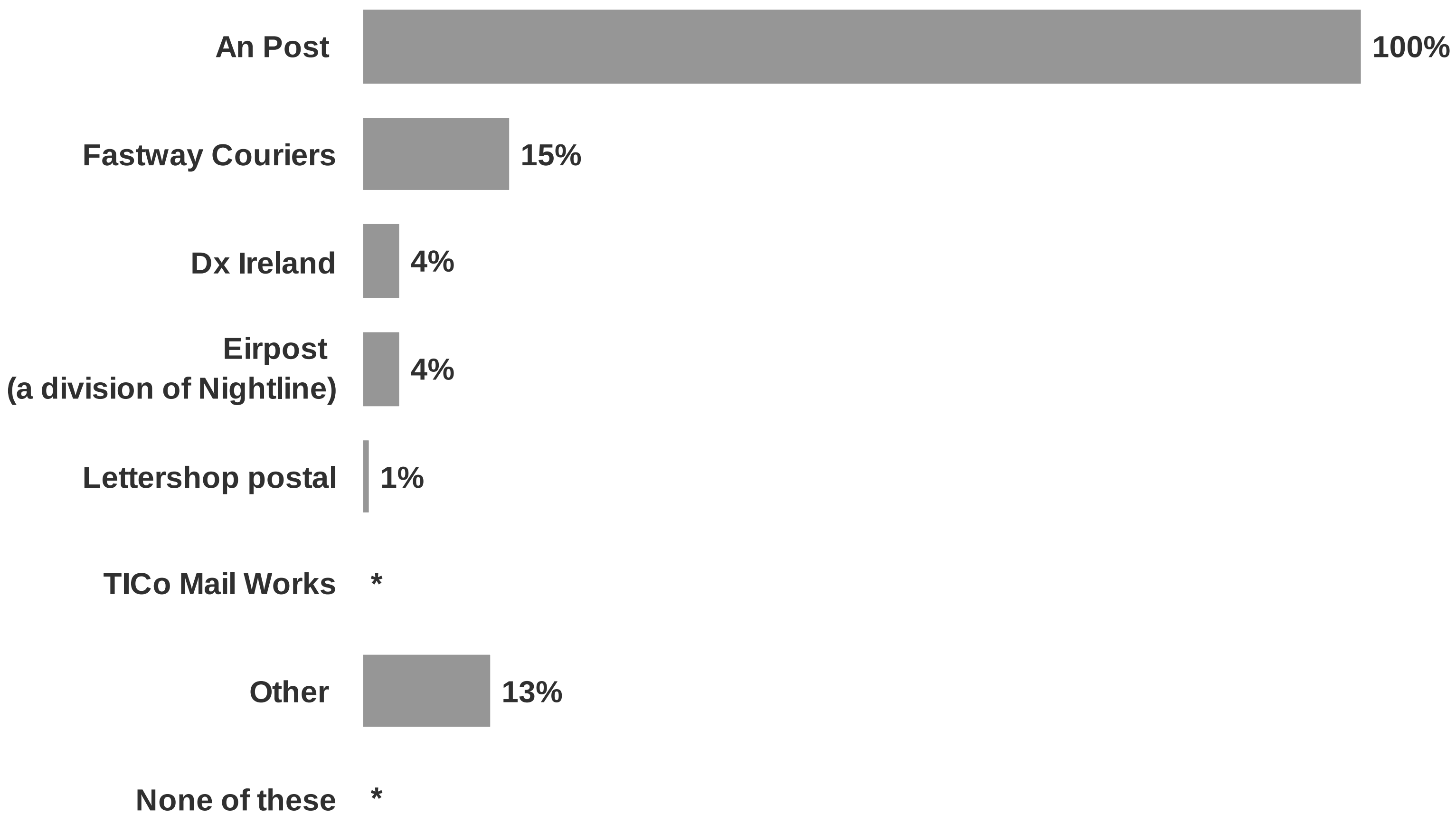
Almost half (47%) of respondents consider they will be using online billing more often in future, rising to 85% of those who currently prefer this method. Even amongst those with a preference for paper billing (30%) there is recognition that they will be using online billing to a greater extent.

Base: All Respondents: 1,000

Sending Parcels/ Large Packets

Awareness Of Companies For Sending

Q.18 If you were looking to send post, either a letter or a parcel/packet, which companies are you aware of that you could use to send your post?

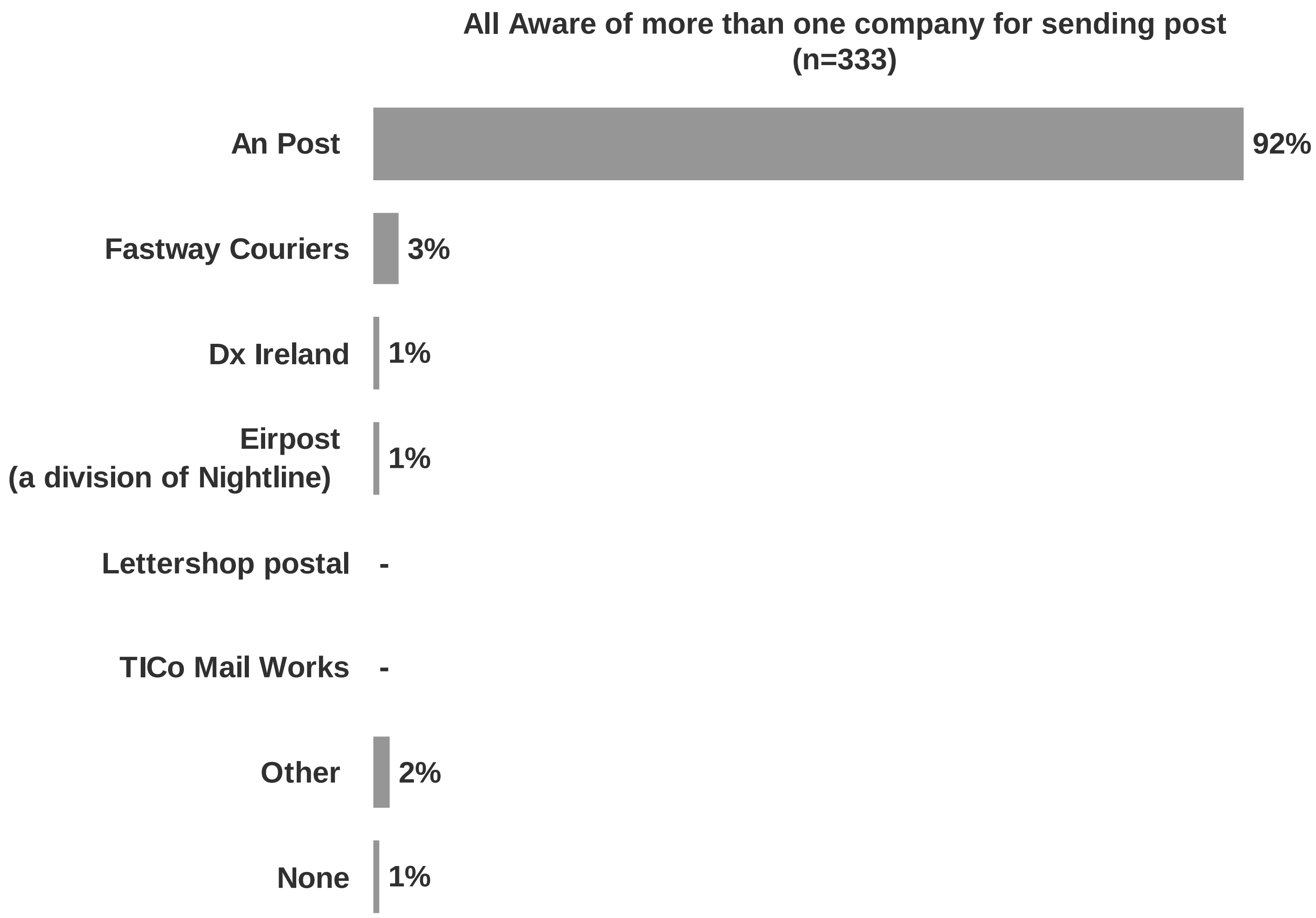


Outside An Post, Fastway Couriers is the only other option mentioned to any significant degree.

Base: All Respondents: 1,000

First Choice For Sending

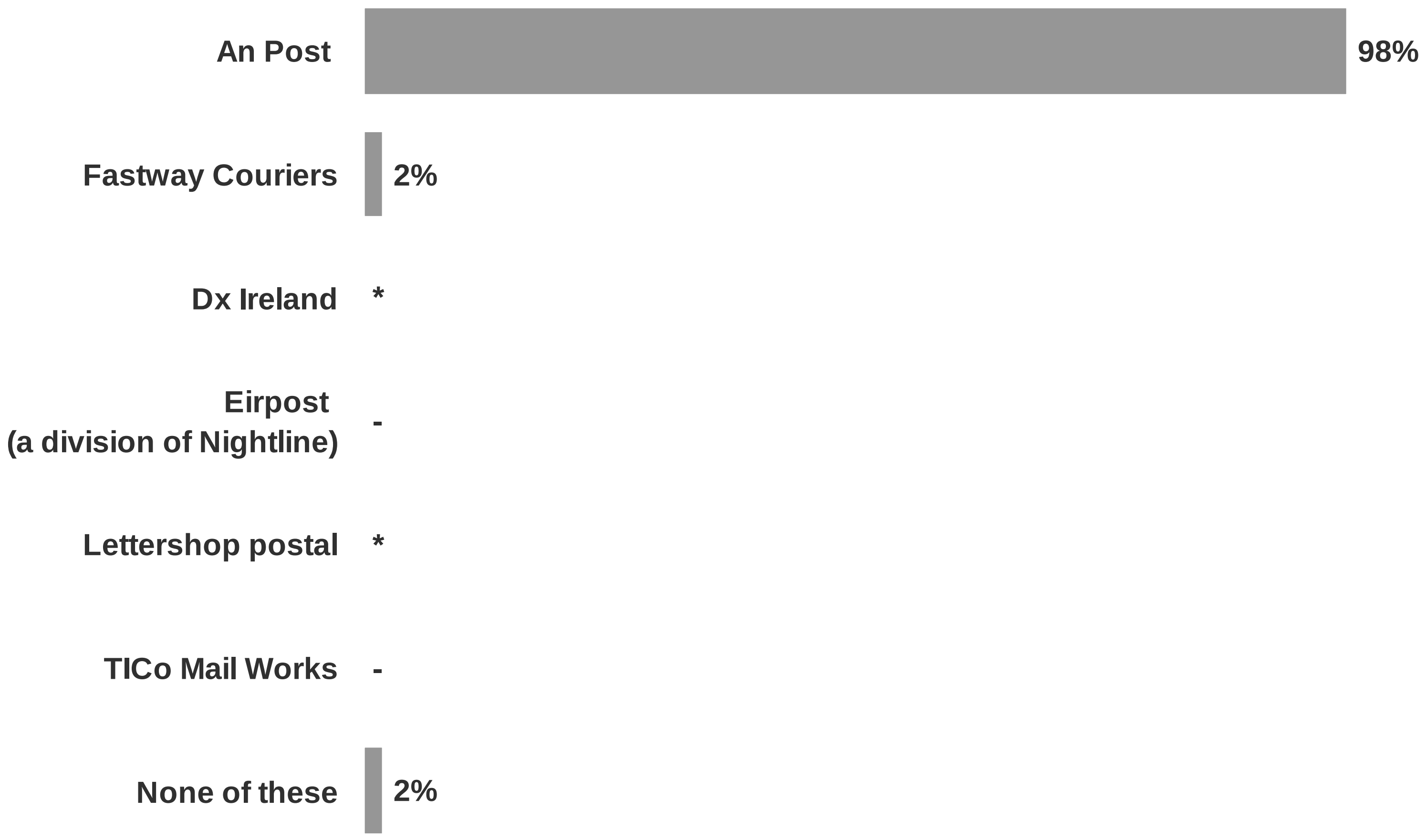
Q.19 And which one company would be your first choice to use to send either a letter or a parcel/packet?



Base: All who are aware of more than one company for sending post: 333

Companies Ever Used For Sending

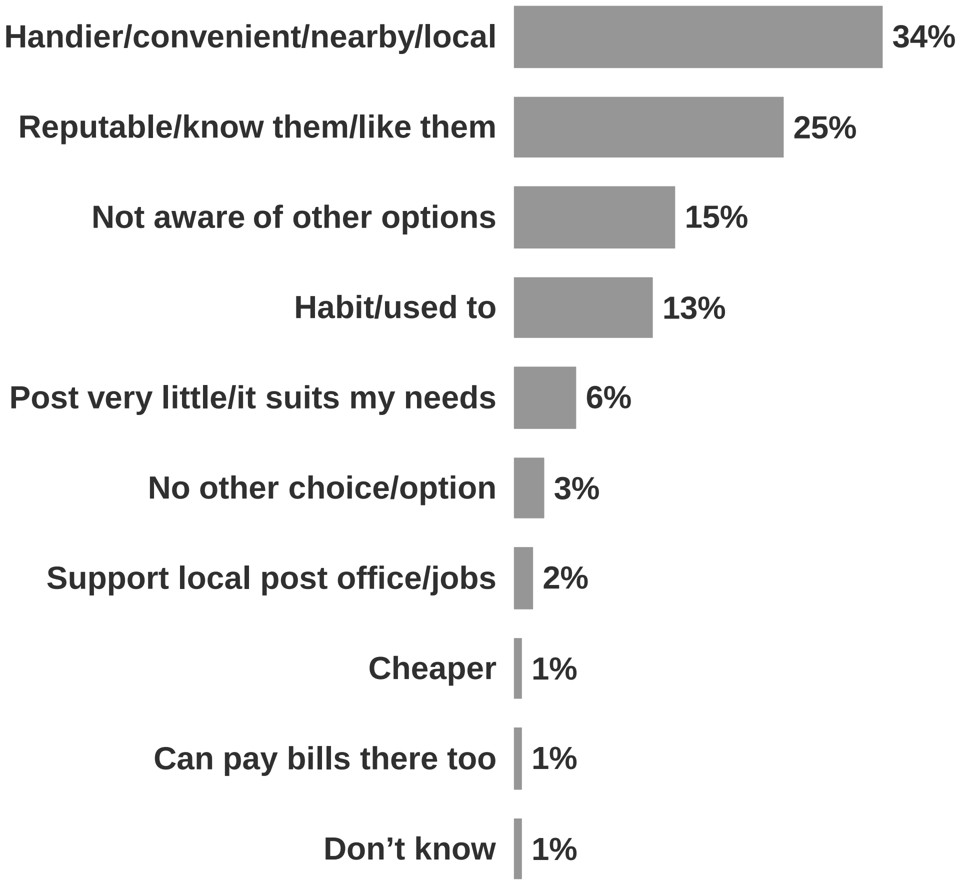
Q.20 Which of the following companies that deliver letters, parcels and packets in Ireland have you ever used?



Base: All Respondents: 1,000

Reasons For Only Ever Using An Post

Q.21 Can you tell me why you have only ever used An Post for sending post? Any other reasons? (SPONTANEOUS)



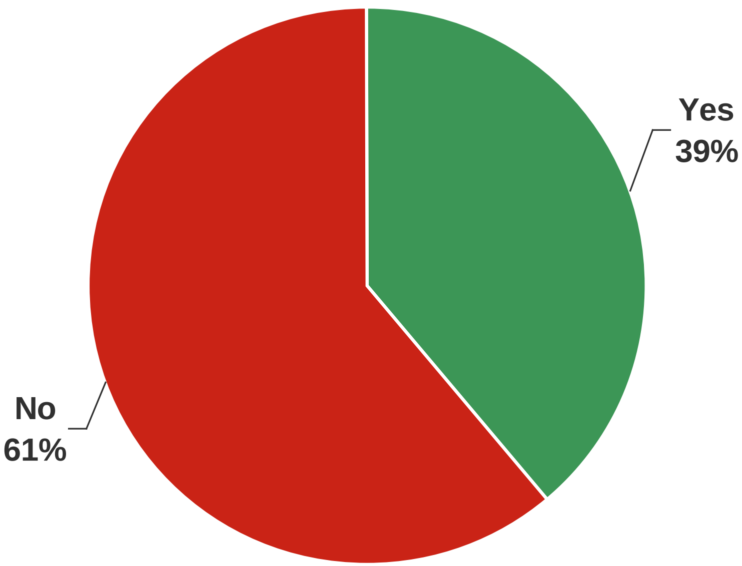
Convenience and trust are key reasons for using An Post.
15% claim they are not aware of other alternatives.

Base: All who have only ever used An Post for sending: 976

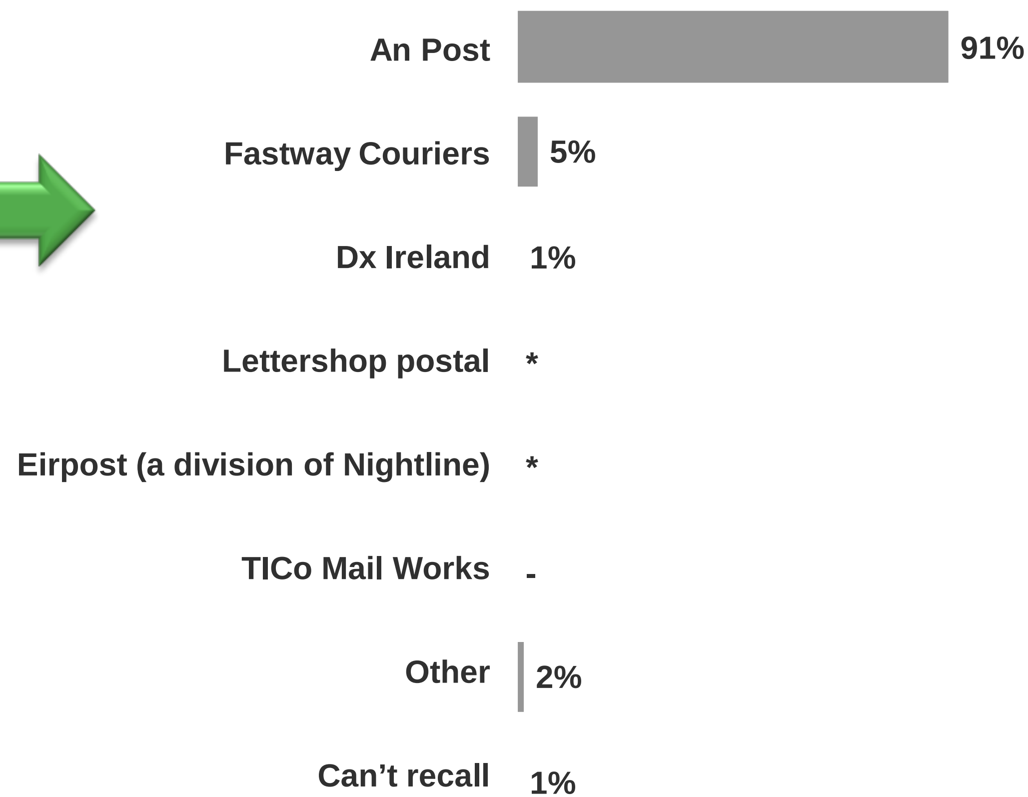
Incidence of Sending Parcel/Large Packet In Past Year

Q.22 In the past year, have you sent any parcels or large packets by post to someone else? Again, by parcel or large packet we mean of a size it would not fit through a typical letterbox.

Q.23 Which company did you use to send the last parcel or packet you sent by post?



Company Used To Send Last Parcel/Packet



Base: All Respondents: 1,000

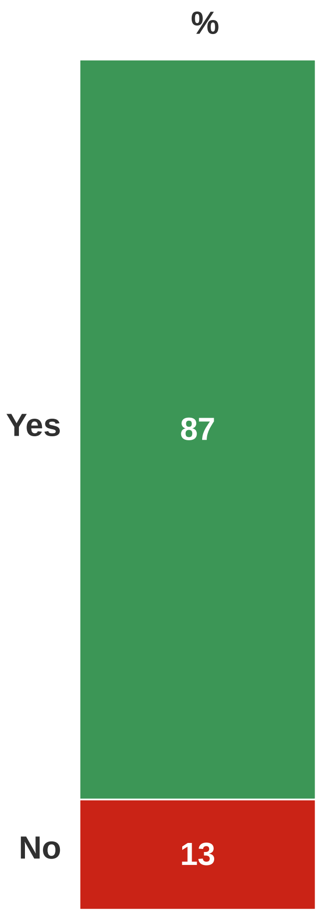
Base: All who have sent parcel/packet by post in past year: 387

Stamps


ÉIRE
17c
2c
ÉIRE
65c
ÉIRE
60c
Puffin
Curlew
ÉIRE
48c
Peregrine Falcon
57c
ÉIRE
ÉIRE
48c
ÉIRE
48c

Purchased Stamps In The Past Year

Q.24(a) Have you bought stamps in the past year, or not?
Q.24(b) On the last occasion you bought stamps, where did you buy the stamps?



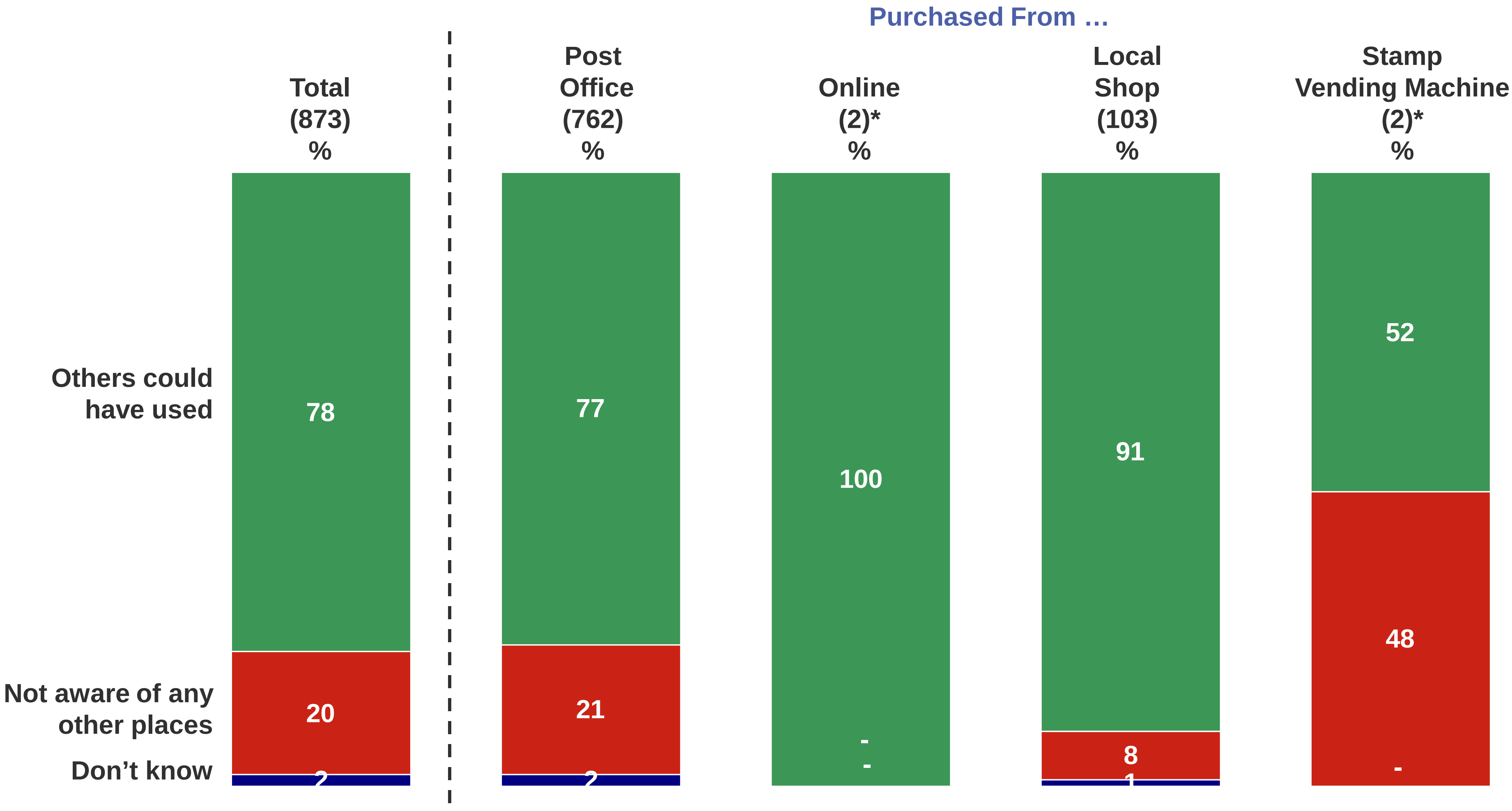
Base: All Respondents: 1,000

Base: All who have bought stamps in the past year: 873

The vast majority of stamps are still sold in the post office. Online is not currently being used.

Other Places To Purchase Stamps

Q.24(c) Were you aware if there are any other places you could have bought stamps or were you not aware of any other places?



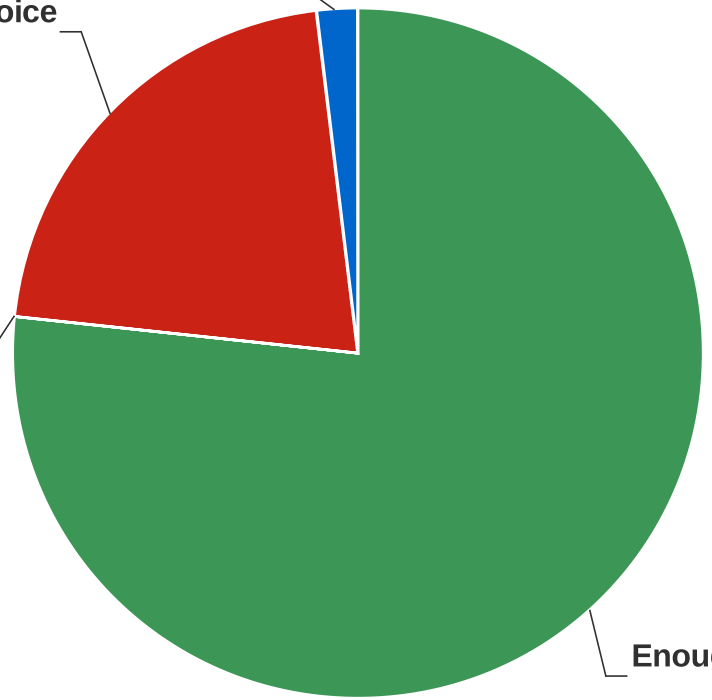
1 in 5 are not aware of other places where stamps can be bought.

Base: All who purchased stamps in past year: 873

Ipsos MRBI

Choice Of Places To Buy Stamps

Q.24(d) When it comes to buying stamps, do you think you have enough choice of places to buy stamps, too much choice or not enough choice?



1 in 5 (21%) consider there could be a wider choice of places from where stamps could be bought.

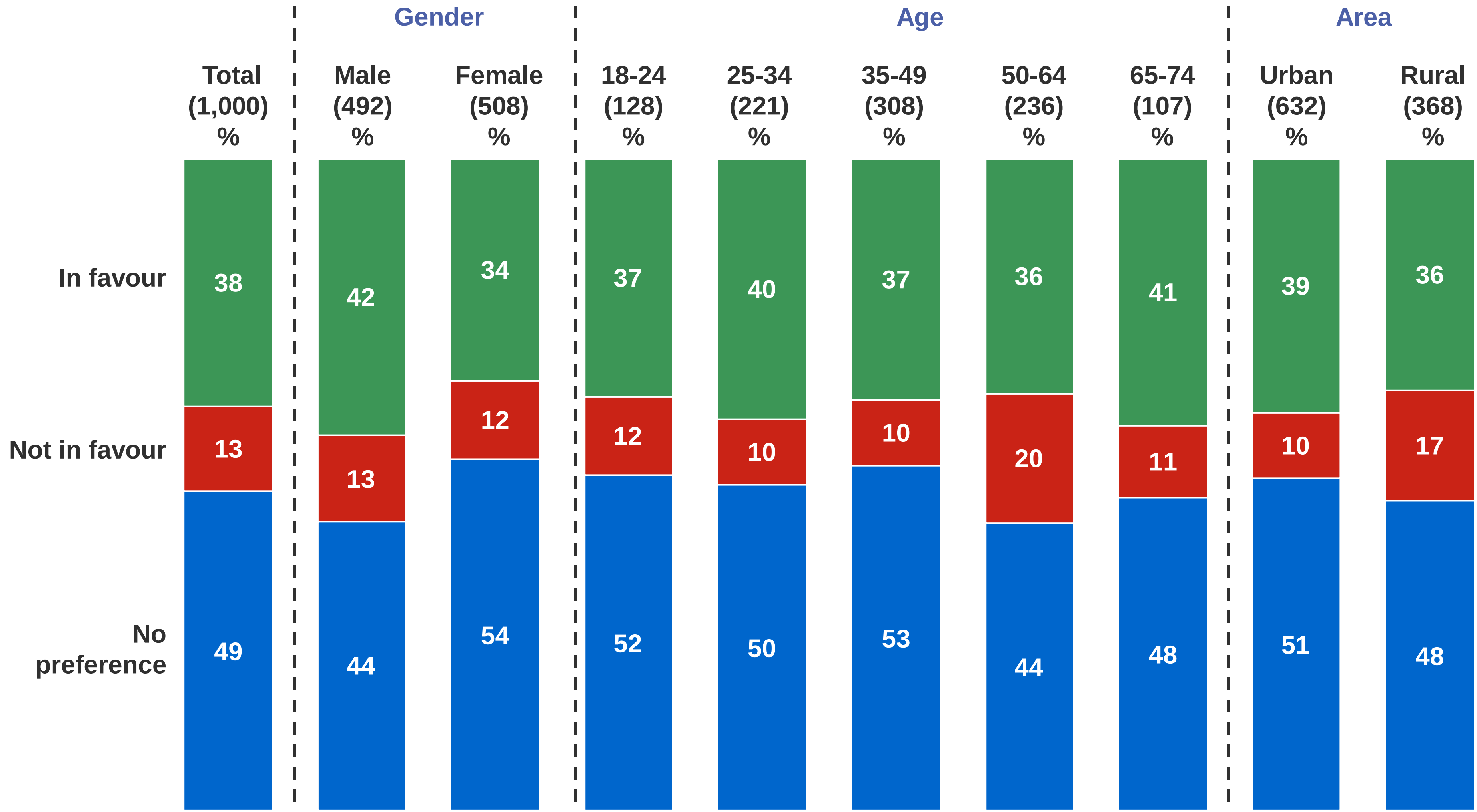
** Caution Small Base Size*

Base: All who purchased stamps in past year: 873

Postcodes

In Favour Of Postcodes

Q.25(a) Are you in favour or against the full introduction of postcodes into Ireland, or do you have no preference either way?



Of those with a preference (51% of respondents) the majority are in favour of the introduction of postcodes. Those in rural areas are less likely to be in favour of postcodes.

Base: All Respondents: 1,000

Benefits Of Postcodes

Q.25(b) What, if any, do you think would be the benefits from introducing postcodes? Any others? (SPONTANEOUS)

	Total	In Favour (384) %	Not In Favour (124) %
Improving the efficiency and quality of the postal sector	38%	68	6
Bringing Ireland into line with international best practice	14%	25	3
Giving rural households a 'unique address' without amending their existing addresses	14%	23	4
Assist in provision of public & private sector services, incl. utilities & emergency services & the conduct of research,	4%	6	2
Facilitating the entry of new postal operators into the market/stimulating competition	3%	6	2
For ordering online	3%	6	1
Good for sat nav/GPS purposes	1%	1	-
More accurate delivery/stop post getting lost	*	1	-
Other	2%	4	1
Can't think of any	43%	5	85

Where benefits are recognised, these are mainly to do with improving the efficiency and quality of the postal sector.

Base: All Respondents: 1,000

Drawbacks Of Postcodes

Q.25(c) And what, if any, do you think would be the drawbacks? Any others? (SPONTANEOUS)

	Total	In Favour (384) %	Not In Favour (124) %
Cost of setting up	17%	18	29
Consumer resistance to changing address format/current postcode	15%	14	30
Cost of maintaining	6%	5	14
Cost (not specified)	6%	6	6
Confusing/complicated	3%	1	10
If you get the code wrong/errors	2%	1	8
No need/leave as is	1%	-	10
Status/stigma/could cause elitism	1%	1	2
Other	1%	1	5
Can't think of any	60%	61	18

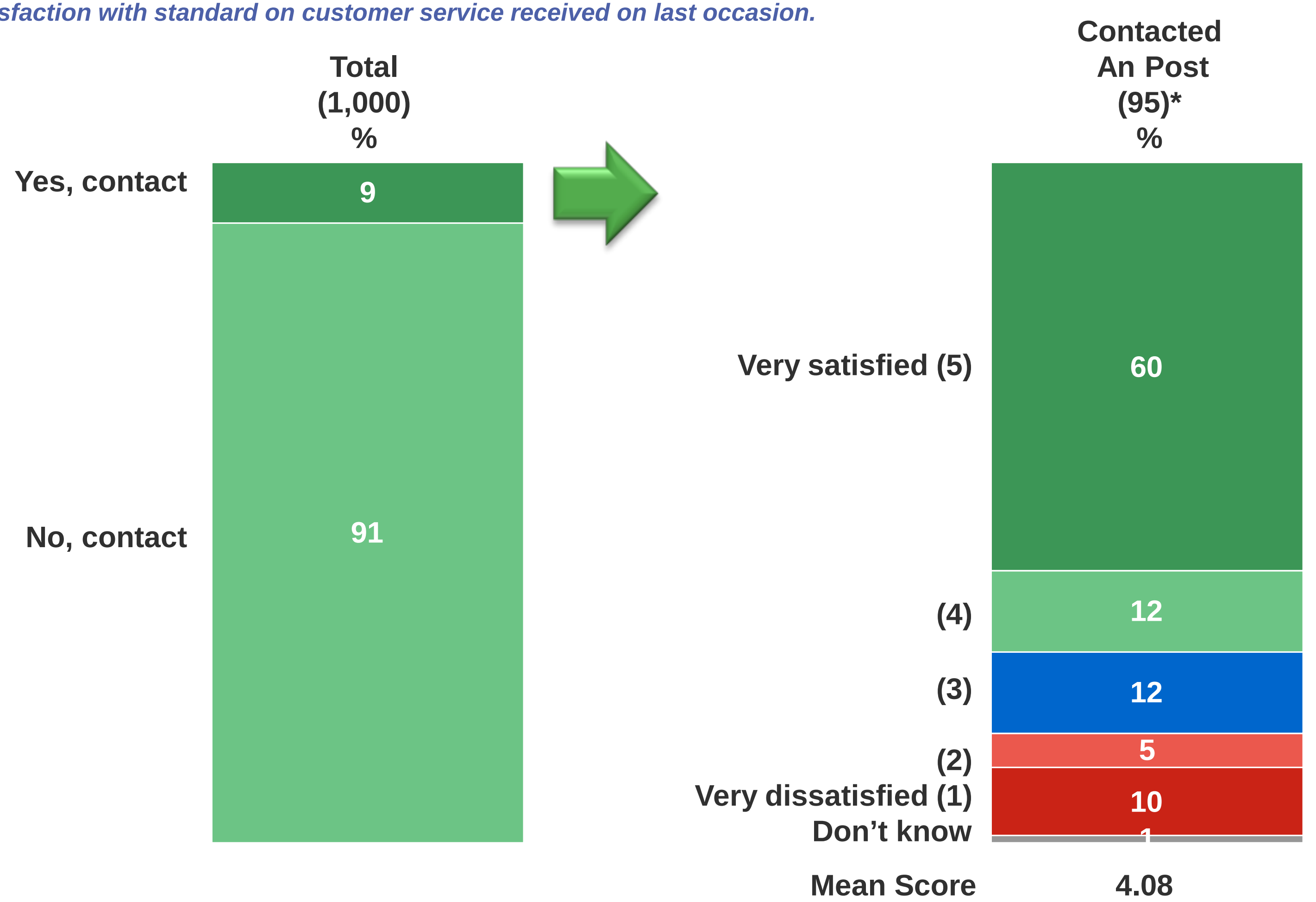
Cost (set-up, maintenance and in general) features as a key concern, whilst 15% also expressed they were against changing the current address format.

Base: All Respondents: 1,000

An Post

Contact with An Post In Past 12 Months

Q.26(a) 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. By this we mean about stamps, cost of sending items, registered post, insured items and so on.
Q.26(b) Satisfaction with standard on customer service received on last occasion.



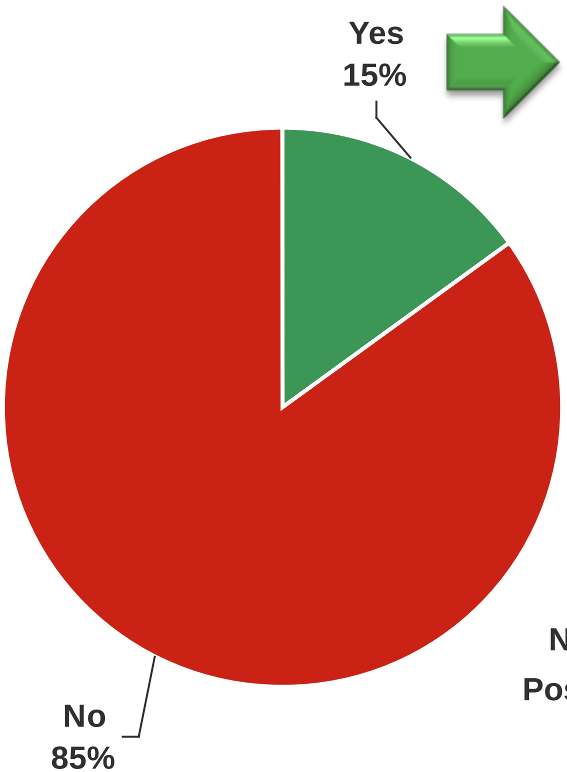
Just under one in ten respondents claim to have contacted An Post in the past 12 months. Overall 72% of those who contacted An Post were satisfied with the customer service.

Base: All Respondents: 1,000

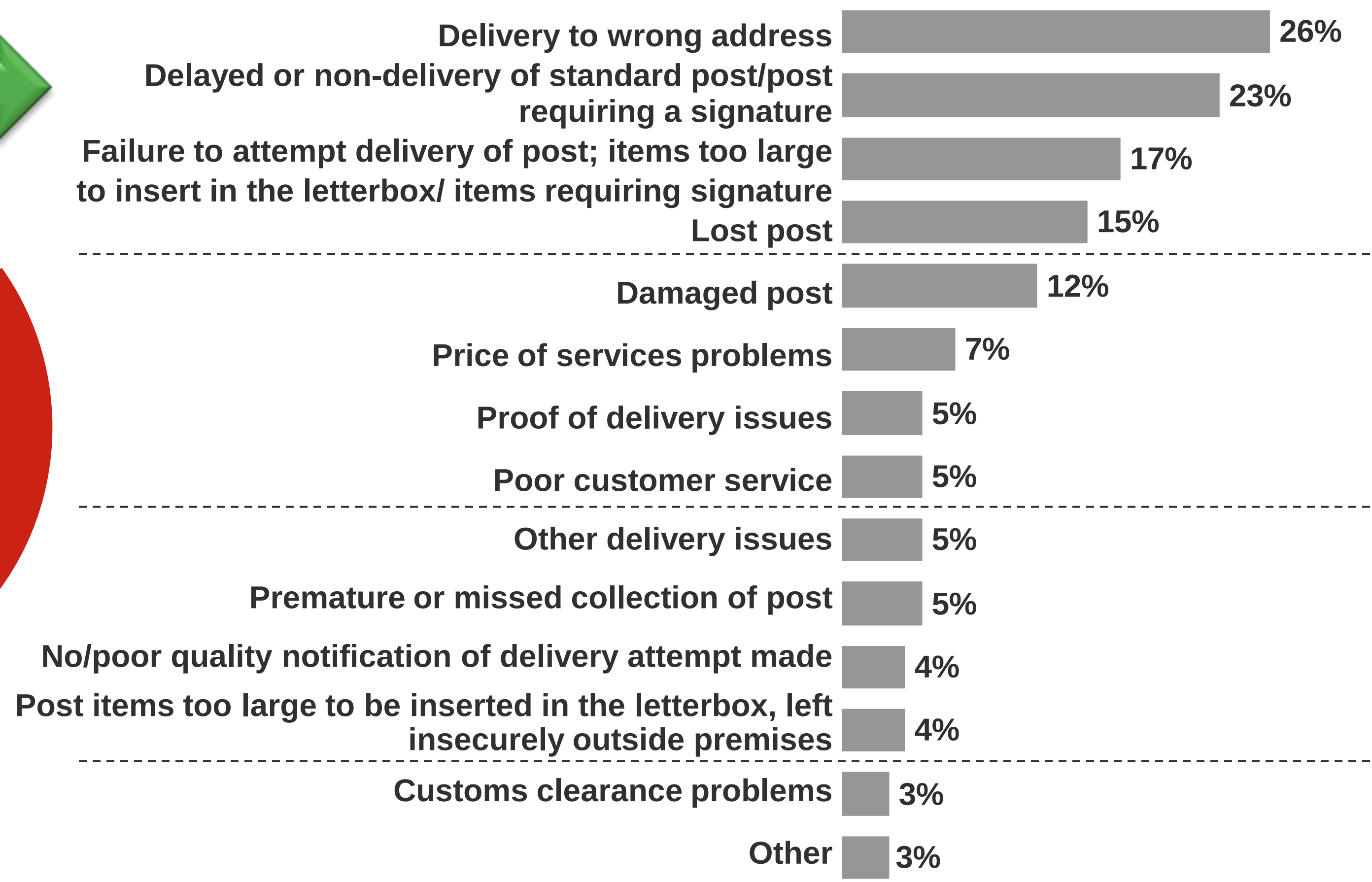
Issues Experienced With An Post Service (Spontaneous)

Q.27 In the past 12 months did you experience any of the following issues with the service provided by An Post?

All Respondents (1,000)



All Respondents Experiencing an Issue (148)

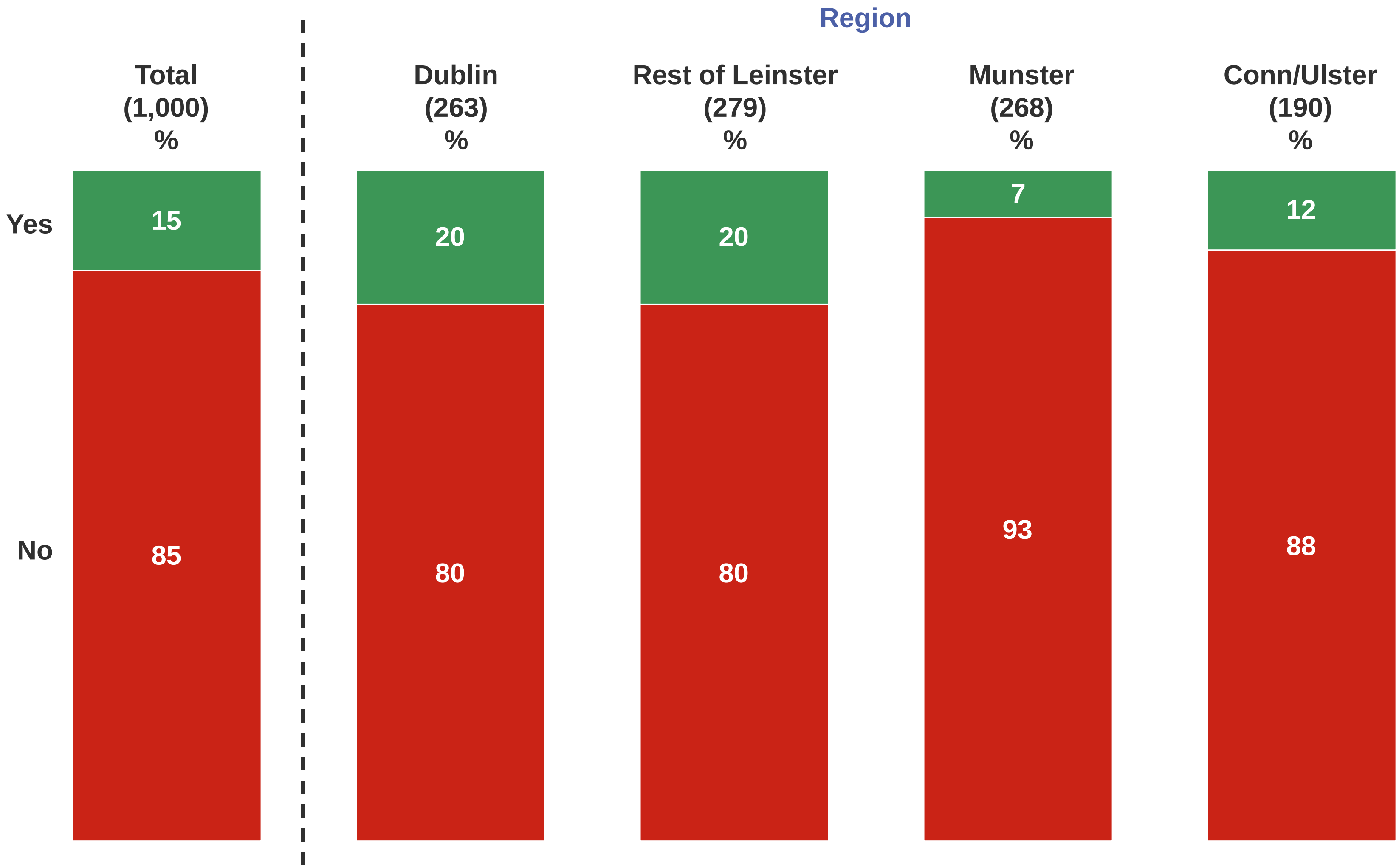


The vast majority of respondents have not experienced any problems with An Post in the past 12 months. However, 15% had issues with An Post and where issues were experienced they were mainly around delivery issues.

** Caution Small Base Size*

Issues Experience With An Post Service X Region

Q.27 In the past 12 months did you experience any of the following issues with the service provided by An Post?



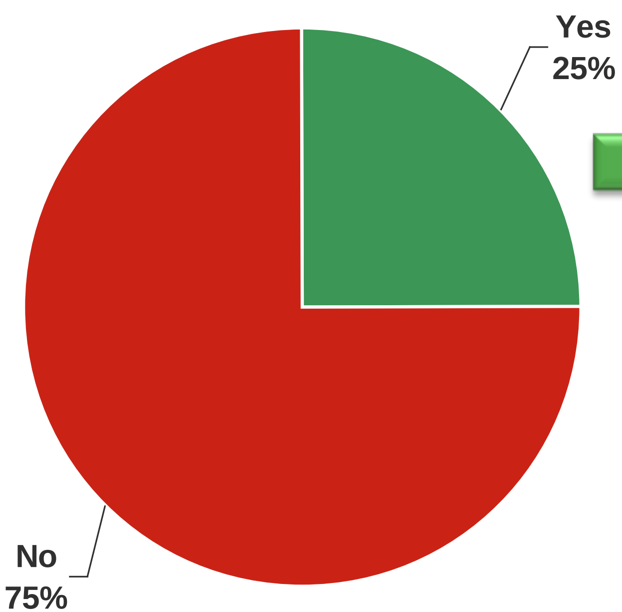
In terms of region, issues were more likely to be experienced in Dublin (20%) and Rest of Leinster (20%).

Base: All Respondents: 1,000

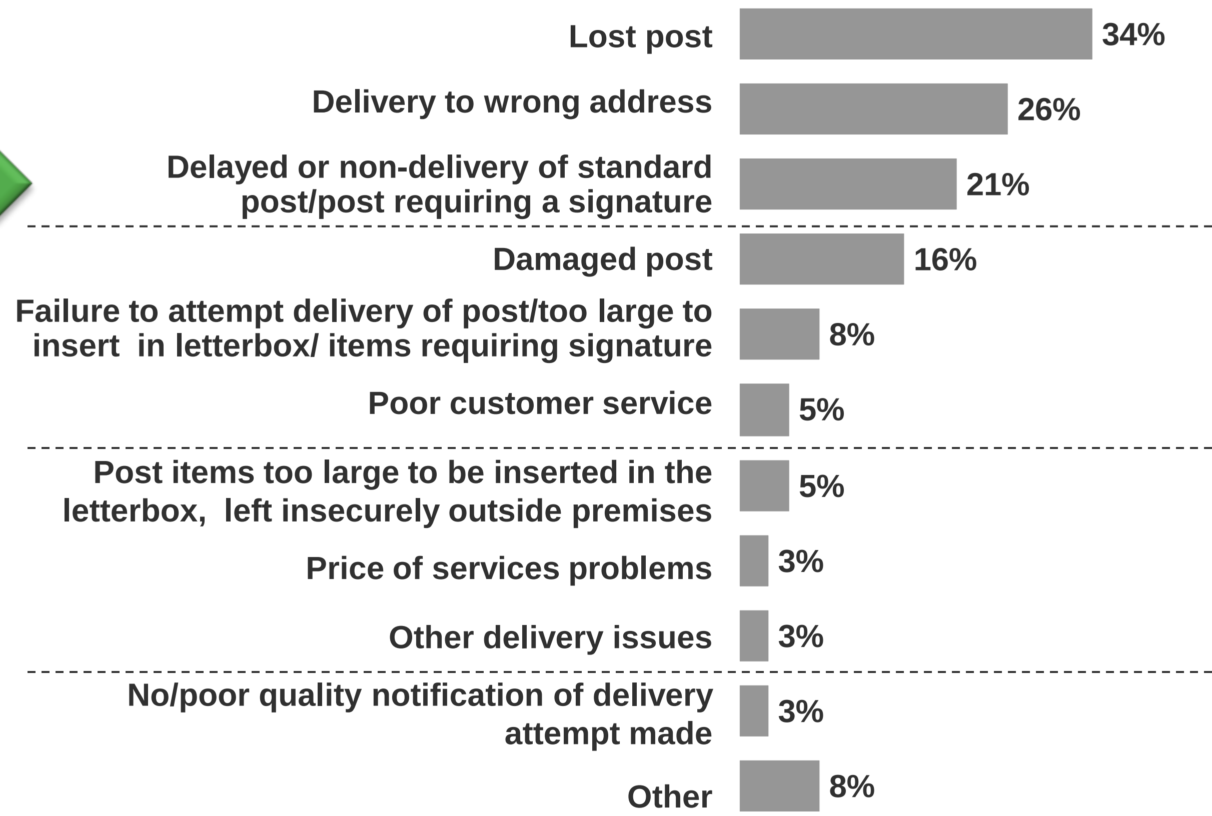
Incidence of Making a Formal Complaint

Q.28 Did you lodge/make a formal complaint about any of these issues to An Post?

All Respondents Experiencing an Issue (148)



All Respondents who made a complaint (38)*

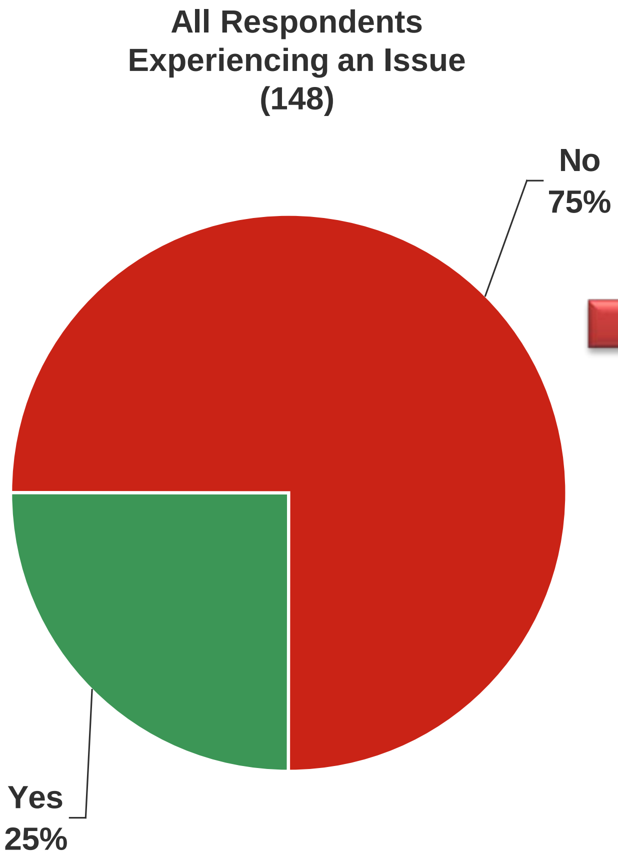


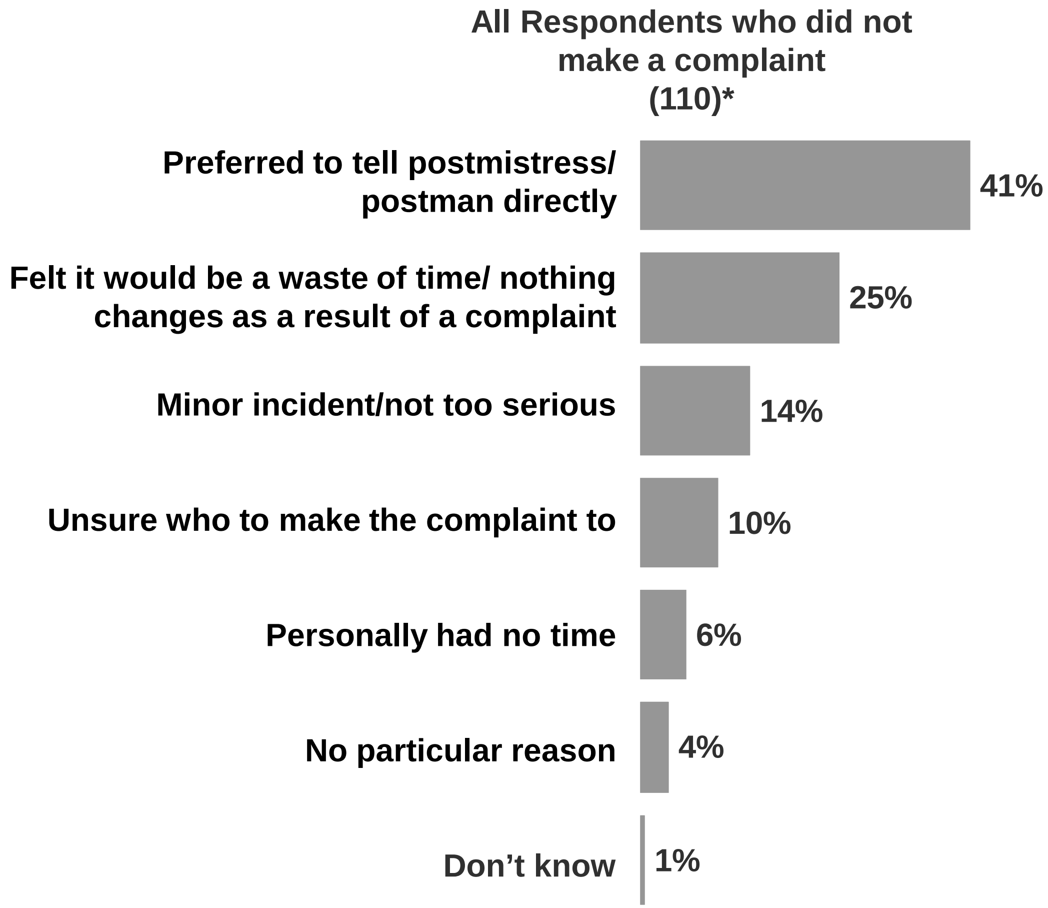
One quarter of those who experienced an issue went on to lodge a formal complaint.

** Caution Small Base Size*

Reasons For Not Lodging A Formal Complaint

Q.29 What would you feel was the main factor in deterring you from making a formal complaint to An Post?

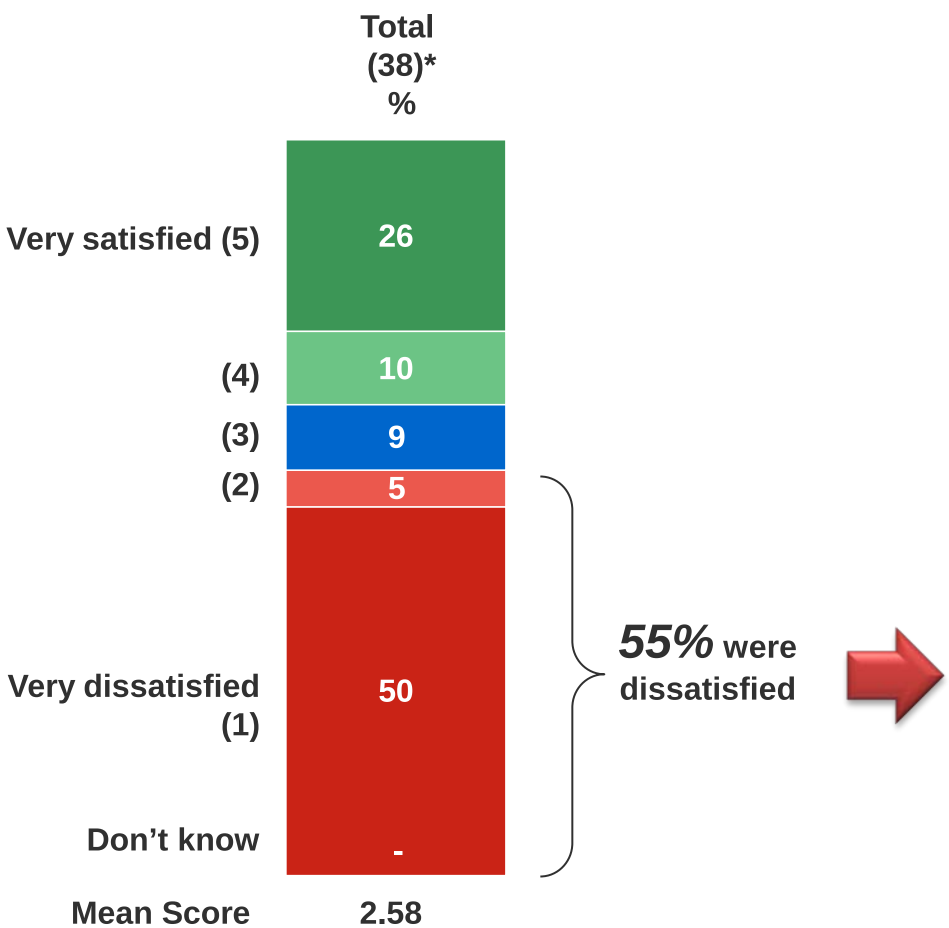


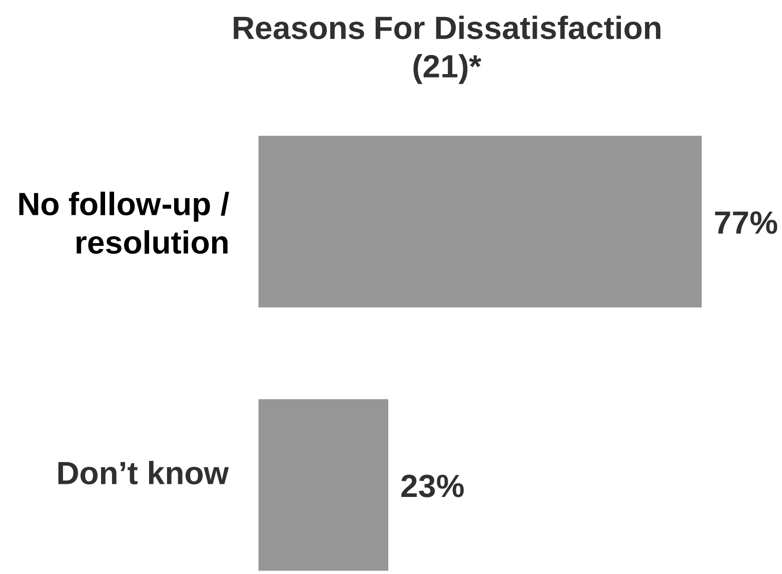


Where a formal complaint was not lodged 41% of respondents claim to have discussed the issue with the postman/postmistress directly.

Satisfaction With Formal Complaint Handling

Q.30 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?





Half of those who lodged a formal complaint were very dissatisfied with how it was handled.

** Caution Small Base Size*

Base: All who lodged a formal complaint: 38*

Conclusions

Conclusions – Usage and Awareness of Postal Services

Receiving Post

- Of the different types of items received, Bills/ Statements are the most widespread and the most frequent, delivered to 93% of households in the year and to 40% in the past week. Post from Government Departments and Greetings Cards follow (89% and 84% of respondents receiving in the past year, respectively), then personally addressed Direct Marketing (72%) – the latter is also relatively frequently delivered, with 24% households receiving these items in the past week.
- Receipt of Personal Letters appears to have declined the most with 50% of respondents claiming they receive fewer of these items compared to five years ago. 35% also receive fewer Greetings Cards.
- Around two thirds (66%) received a personally addressed packet/ parcel in the past year. Amongst these recipients over three quarters (78%) claimed their most recent delivery was successfully made on the first attempt, whilst 14% had to collect it from an office or depot after receiving a notice.
- An Post delivered 75% of these parcels/ packets, with Fastway Couriers the only other operator recalled to any significant extent (8%).

Sending Post

- Almost all respondents (98%) have used An Post at some point for sending items (letters or parcel/ packets). Convenience and trust are cited as key reasons for using An Post.
- Apart from An Post, Fastway Couriers registers the highest awareness levels (8%), followed by DX Ireland (4%) and Eirpost (4%). Amongst the one third of respondents who are aware of more than one operator for sending, the vast majority (92%) claim An Post would be their first choice.
- Almost 2 in 5 (39%) have sent a large packet/ parcel in the last year, of which 91% were via An Post.

Conclusions – Convenience of Postal Services

Receiving Packets/ Parcels

- Amongst the two thirds (66%) of respondents receiving packets/ parcels in the past year, a minority of 7% considered their delivery to be inconvenient. Although off a small base, the ability to provide a specific delivery time was most desired as a way in which to make the delivery more convenient.
- In addition 13% of those in employment have had a large packet/ parcel delivered to their place of work in the past year.

Parcel Lockers

- 30% of all respondents are aware of Parcel Locker services such as Parcel Motel and Parcel Xchange. There is regional variation, with awareness levels highest in Dublin (41%) and lowest in Munster and Connaught/ Ulster (both 23%).
- Just under 1 in 10 (9%) of those aware have availed of this service in the past year. The conversion rate from awareness to usage is however higher in Munster and Connaught/ Ulster (both 48%).

Stamps

- Of the 87% of respondents purchasing stamps in the past year, the vast majority did so at a post office (88%). Local shops have been used by 12% with alternative channels hardly registering.
- There is a lack of awareness of other sources from which to buy stamps, with 1 in 5 of those buying stamps not aware of alternatives to the post office. A similar proportion (21%) consider there should be a wider range of places available from where to buy.

Conclusions – The Impact of Online

Ordering Online

- Of the 84% of the population with internet access, 42% have ordered goods requiring delivery within the past month
- The vast majority (95%) of those who have ordered goods online for delivery would do so again in future. While most of those who would not cite no particular reason, a small minority mention lack of trust and fraud as concerns.

Online Billing

- There appears to be some variation in the degree to which companies have implemented online billing amongst their customers. Technology companies (mobile telecommunications, entertainment) are most likely to be using online billing.
- Online billing has also become key for payment to Government Departments – 30% of those receiving Motor Tax related statements have done so online as have 23% of those receiving Property Tax statements.
- Almost one third (31%) of all respondents say they prefer receiving online bills/ statements over those in the post. This preference tends to be higher amongst males, those aged under 35, ABC1s and those living in Dublin.
- Ease and convenience dominate as the key reason for preferring online billing (54%). In contrast, for those preferring paper billing, having a hardcopy serves both as a reminder (28%) and as a means for tracking/ checking and comparing (26%). Lack of access to a computer is also an issue for 20% of those preferring paper versions.
- The trend towards online billing is widely recognised with 83% of all respondents saying they will use it as often or more often (47%) in the years ahead. Even amongst those who prefer paper based billing, 30% claim they will increase their use of online billing in future.

Conclusions – Satisfaction with An Post

- Just under 1 in 10 have contacted An Post in the past year with regard to its postal service offerings.
- Overall, 72% of those who contacted An Post were satisfied (60% very satisfied) with An Post's customer service.
- 85% of respondents experienced no issues with the service provided by An Post over the past 12 months. A range of issues were experienced by the remaining 15%: delivery to the wrong address, delayed delivery and failure to deliver large items/ those requiring a signature being the main ones mentioned.
- 1 in 4 of those experiencing an issue with An Post's service made a formal complaint to An Post. Indications are that this was more likely when items had been lost or delivered to the wrong address.
- Findings indicate that over half (55%) of those making a formal complaint were dissatisfied with how it was handled, largely due to lack of follow up or resolution. Note: figures are based off a small number of respondents.
- Where a formal complaint was not lodged top reasons given were: a preference to tell the postmistress/ postman directly (41%) or that they felt it would be a waste of time (25%)

Conclusions – Postcodes

- Of those with a preference (51% of respondents), the majority are in favour of the introduction of postcodes into Ireland. Those in rural areas are less likely to be in favour of postcodes.
- Specific benefits of postcodes are recognised by 57% of respondents. These are mainly to do with improving the efficiency and quality of the postal sector (38%). Other mentions include bringing Ireland into line with international best practice and giving rural households a unique address without amending their existing address (both at 14%).
- Specific drawbacks are given by 40% of respondents. Cost is the main barrier which emerges - in relation to set-up, maintenance and in general, followed by consumer resistance to changing the current address format/ postcodes where these exist.

Thank you

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