



ComReg Postal service users Residential Consumer study

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RESEARCH
& INSIGHT



Report Format

- Introduction
- Familiarity with the Irish postal service & online purchasing
- Standard Letter: Receiving
- Standard Letter: Sending
- Parcel/package: Receiving
- Parcel/package: Sending
- Key highlights



Introduction

Research Methodology: Sampling

- Fieldwork for this study was conducted during April-May 2019.
- Survey data collection methodology was 'face to face' interviewing via CAPI (Computer Aided Personal Interviewing). All interviewing was administered at the respondent's own home – 1,500 respondents were interviewed in total.
- At data processing stage 4 surveys were removed from the data set as they did not match quality control criteria. (A standard process in order to ensure the quality of utility estimation).
- The total sample was split across three distinct segments, based on population density, with the same proportion of interviews being conducted across all areas (the sample size by segment has been detailed overleaf).
- Within each segment interlocking quotas were applied across gender and age to ensure that the findings are fully representative of Irish adults aged 18+ living in each area.



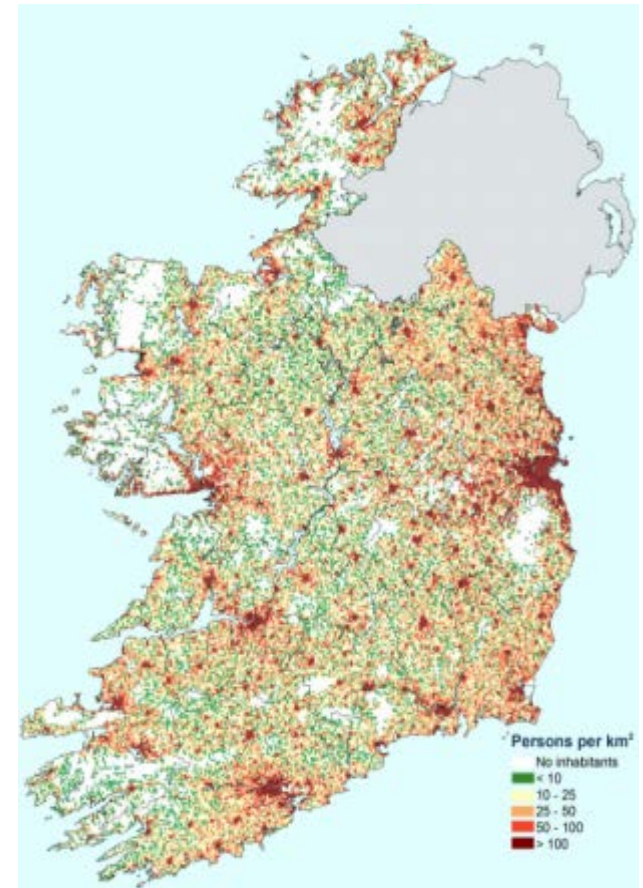
Research Methodology: Weighting

- A corrective weight has been applied to the data within each segment to ensure that it is fully representative of all adults. The total sample of 1,496 has also been amalgamated and weighted back in line with the total population aged 18+ (the weighting applied has been detailed on the next page).
- Margin of error on a sample of 1,496 is +/- 2.6%pts. For smaller sub samples the margin will be greater.
- Significance testing to 95% confidence level has been applied to the data and is highlighted throughout this presentation. In tables, green highlighting = significantly higher result than total result, while red highlighting = significantly lower result than total result.
- Commentary detailing 'higher' or 'lower' identifies findings that are significantly higher or lower versus the total sample.



Sample Size & Population Density

	Population Density		
	High	Medium	Low
Sample Size	502	492	502
Population Density	>100 per Sq. Km	<100 and >25 per Sq. Km	<25 per Sq. Km
Total Population (2011)	2,899,576	1,158,294	530,382
Sq. Km	4,839	26,352	37,274
Number of Electoral Divisions (circa)	789	1205	1,489
Example ED	North Dock Dublin	Slane, Co Meath	Feddyglass, Co Donegal



Source: CSO, Census 2011

Sample Detail



Interviews achieved and corrective weighting applied.

	No of interviews		
	Population density		
	High	Medium	Low
Total	502	492	502
	No.	No.	No.
*Gender			
Male	242	240	251
Female	260	252	251
*Age			
18-24	55	54	56
25-34	80	81	66
35-49	146	151	141
50-64	139	111	126
65+	82	95	113
*Socio-economic status			
ABC1	204	157	131
C2DE	294	312	304
F	4	23	67

	Weighting applied		
	Population density		
	High	Medium	Low
	66%	23%	11%
	%	%	%
*Gender			
	48	50	51
	52	50	49
*Age			
	12	17	9
	21	13	13
	30	28	28
	21	23	27
	16	18	23
*Socio-economic status			
	46	35	27
	52	55	48
	2	9	24

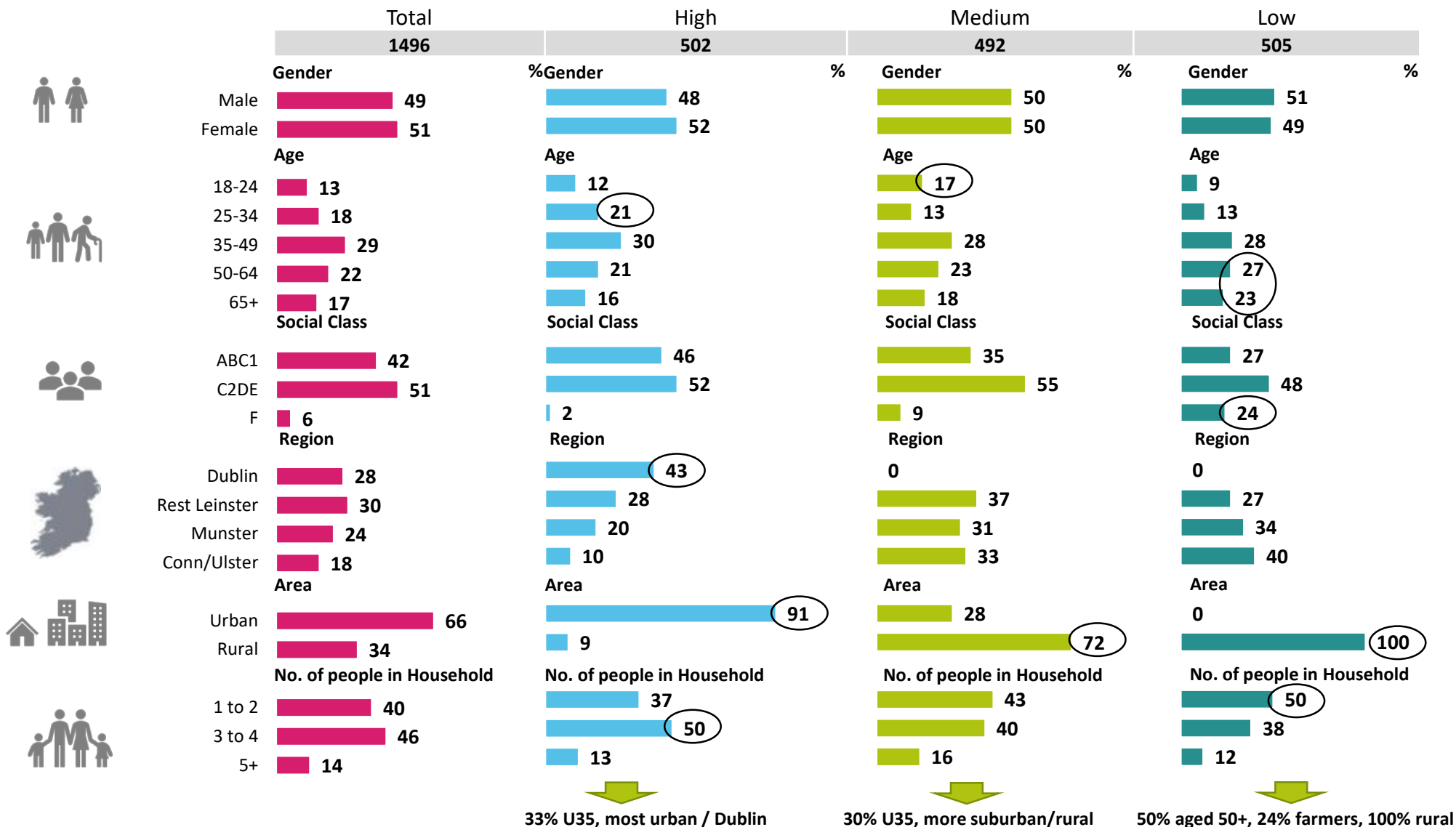
Socio-economic status is based on market research industry agreed figures (AIMRO)

Profile of respondents within each sample area



Base: All adults aged 18+ 1496

Population Density



33% U35, most urban / Dublin

30% U35, more suburban/rural



50% aged 50+, 24% farmers, 100% rural

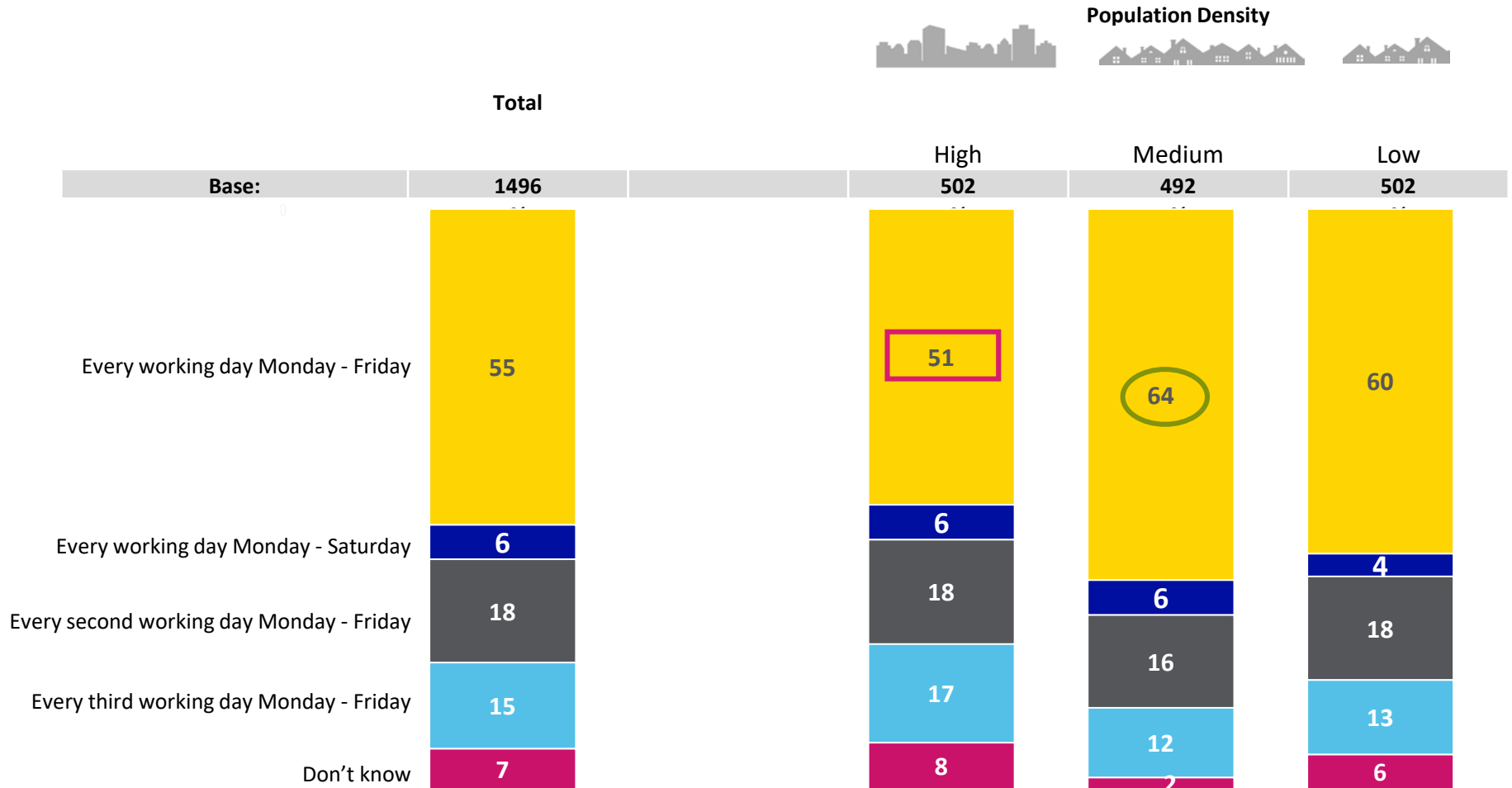


Familiarity with the Irish postal service & online purchasing

Frequency of mail being delivered to the home by an An Post person x sample



Base: All adults aged 18+

 Sig higher vs total
 Sig lower vs total

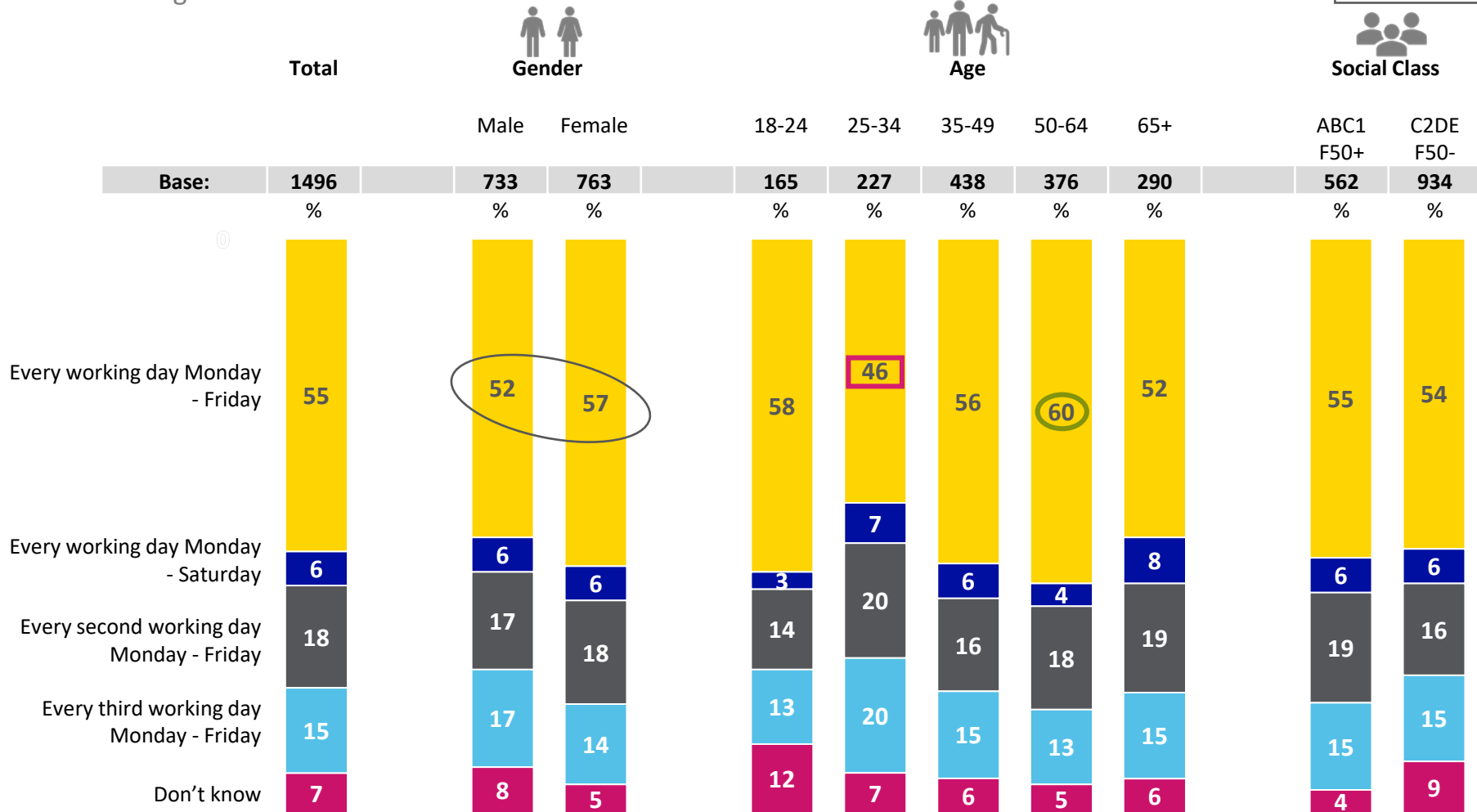


Just over half of Irish consumers note An Post delivers post every working day, Monday-Friday.

Frequency of mail being delivered to the home by an An Post person x demographics

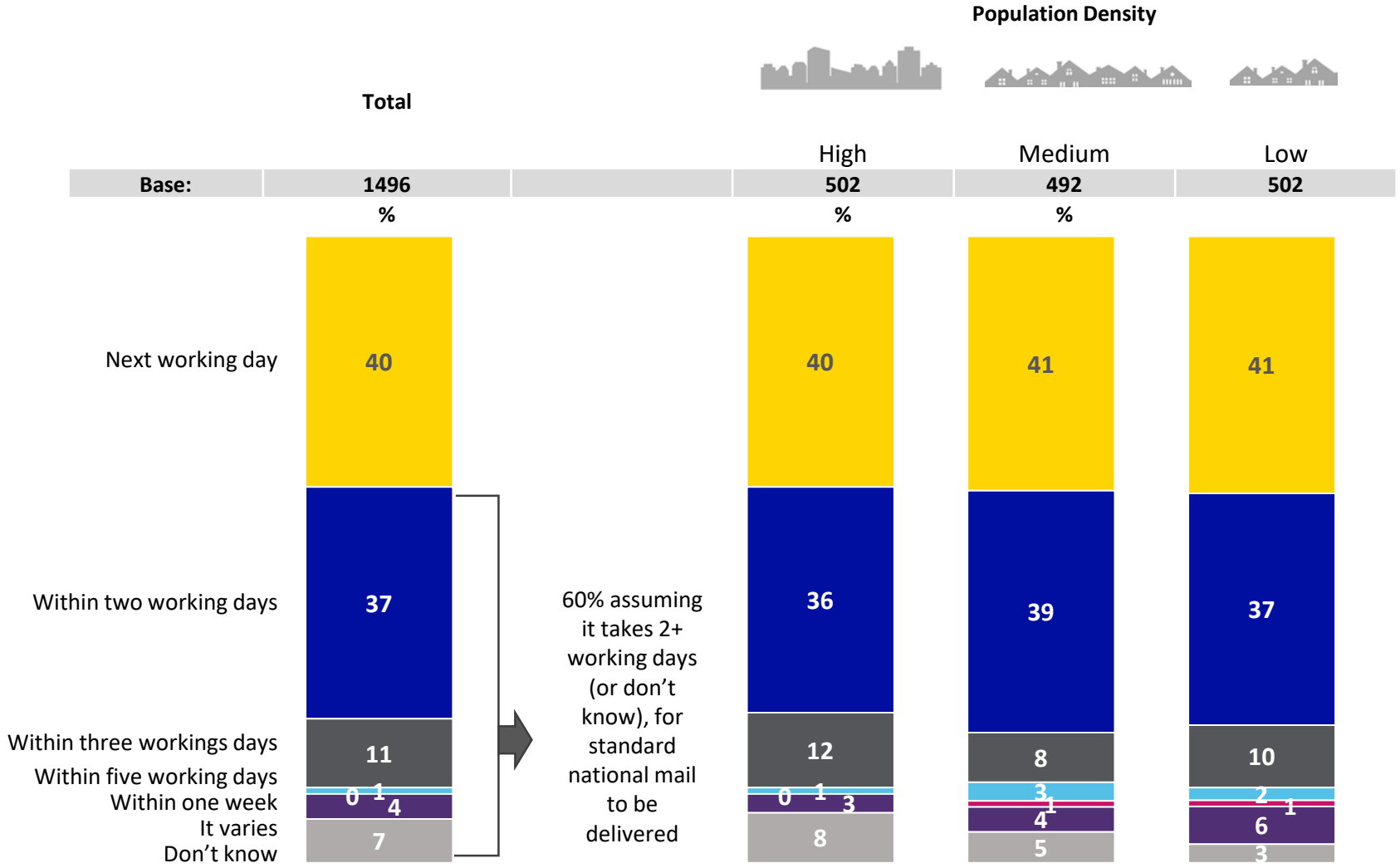
 Sig higher vs total
 Sig lower vs total

Base: All adults aged 18+



Length taken for standard national mail to be delivered within Ireland following the day it is posted x sample

Base: All adults aged 18+



Just 2 in 5 consumers are aware that national mail is delivered on the next working day. No significant variation in awareness across sample areas.

Length taken for standard national mail to be delivered within Ireland following the day it is posted x demographics

Base: All adults aged 18+

Sig higher vs total
 Sig lower vs total



Total

Gender

Age

Social Class

Male

Female

18-24

25-34

35-49

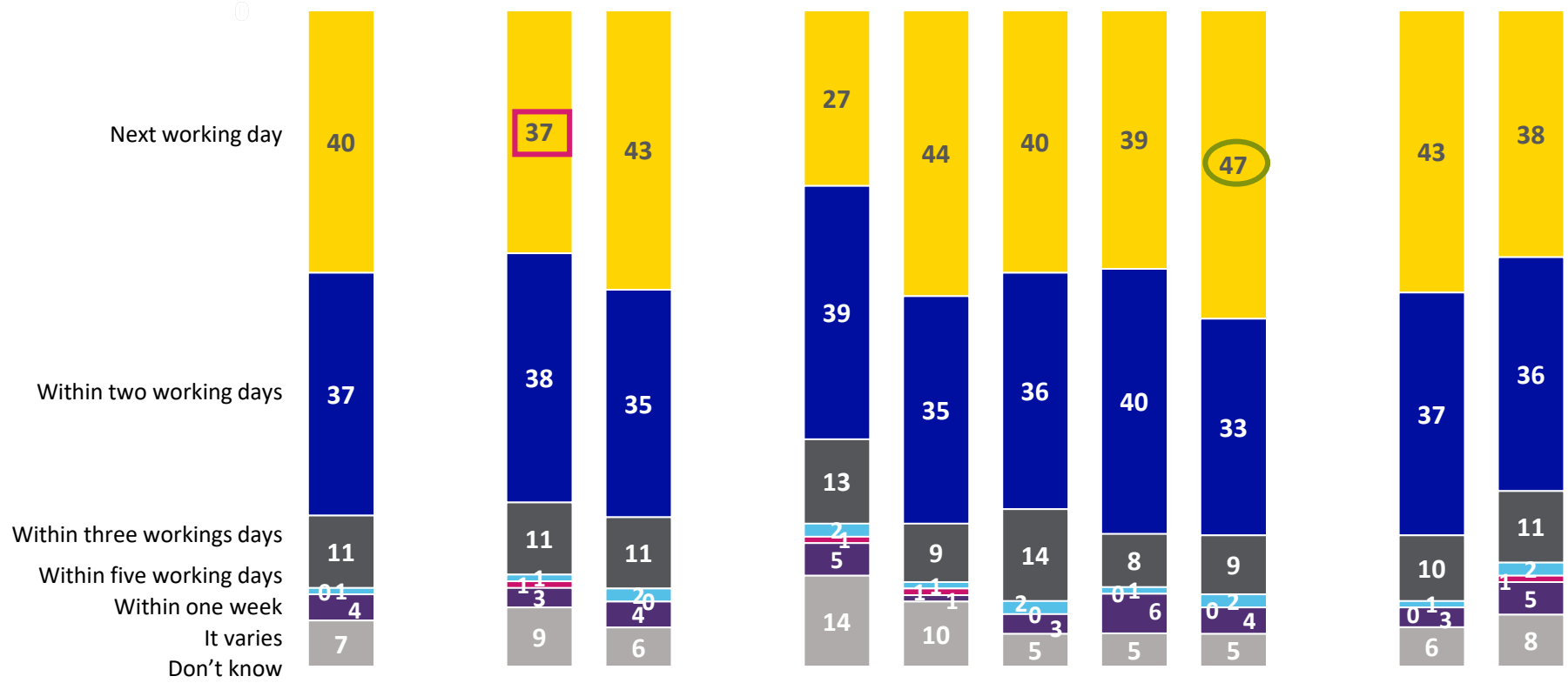
50-64

65+

ABC1
F50+

C2DE
F50-

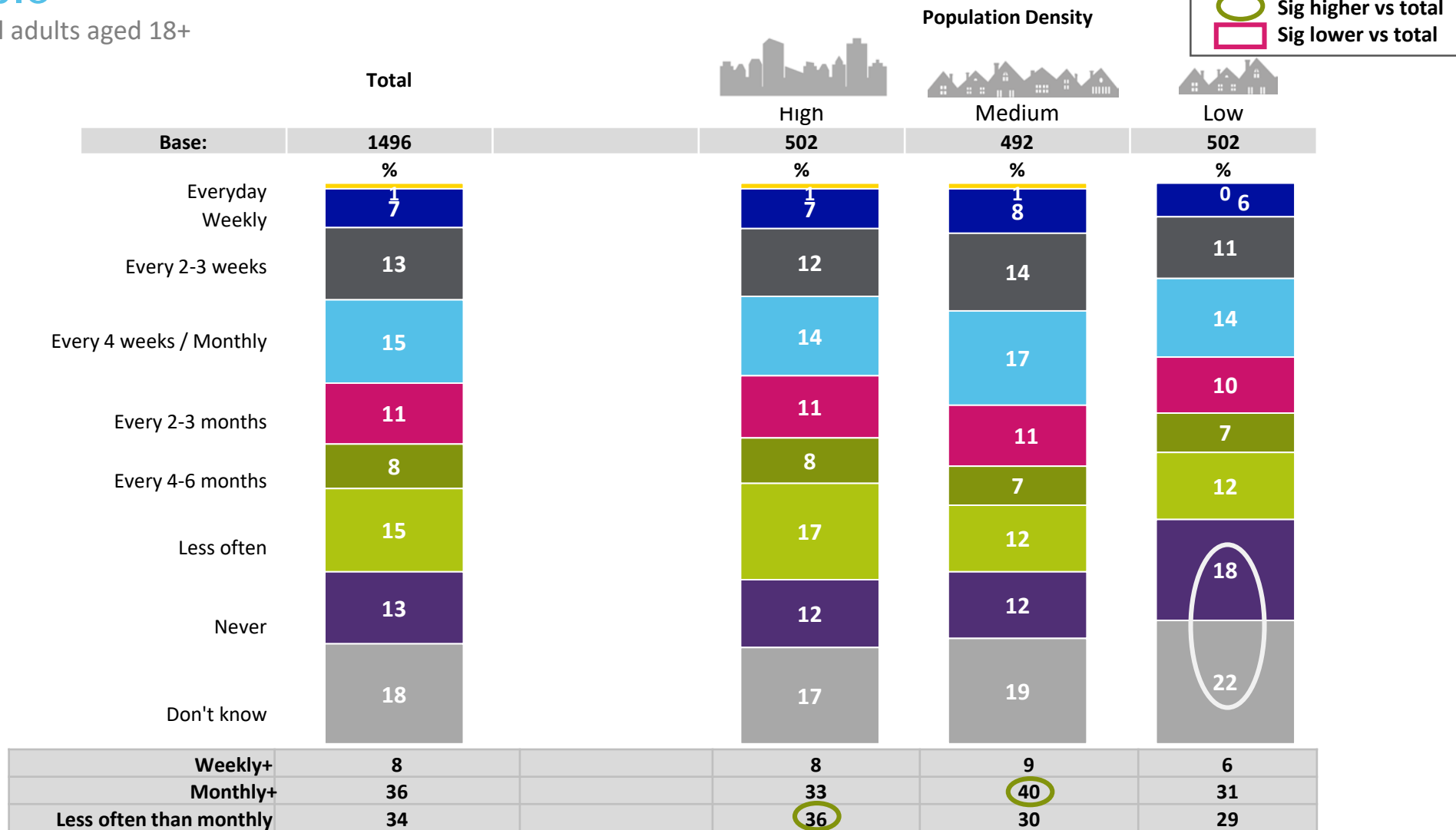
Base:	1496	733	763	165	227	438	376	290	562	934
	%	%	%	%	%	%	%	%	%	%



The 65+ age cohort show higher awareness of national mail being delivered on the next working day. Males awareness of next working day delivery is significantly lower.

Frequency of purchasing items online that need delivery x sample

Base: All adults aged 18+



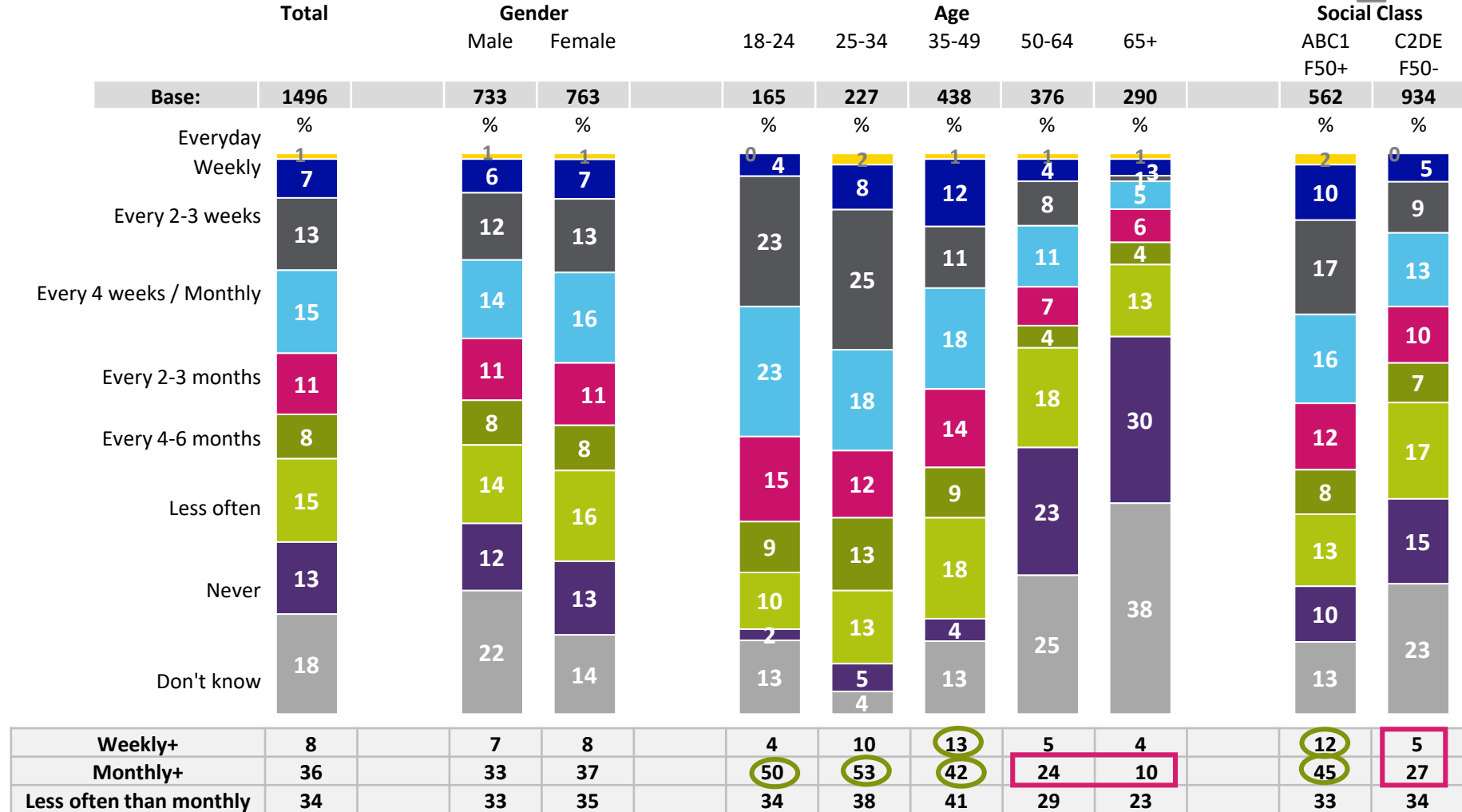
Over 1 in 3 consumers claim to purchase items online that require delivery on a monthly+ basis, mainly those living in Medium density areas. Note, High density areas over index on less often than monthly – more Dublin & urban based areas (convenience of shopping locations may be impacting here)



Frequency of purchasing items online that need delivery x demographics

Base: All adults aged 18+

○ Sig higher vs total
 □ Sig lower vs total




The under 50s age group and ABC1s are the most frequent monthly+ purchasers of online products that require delivery.



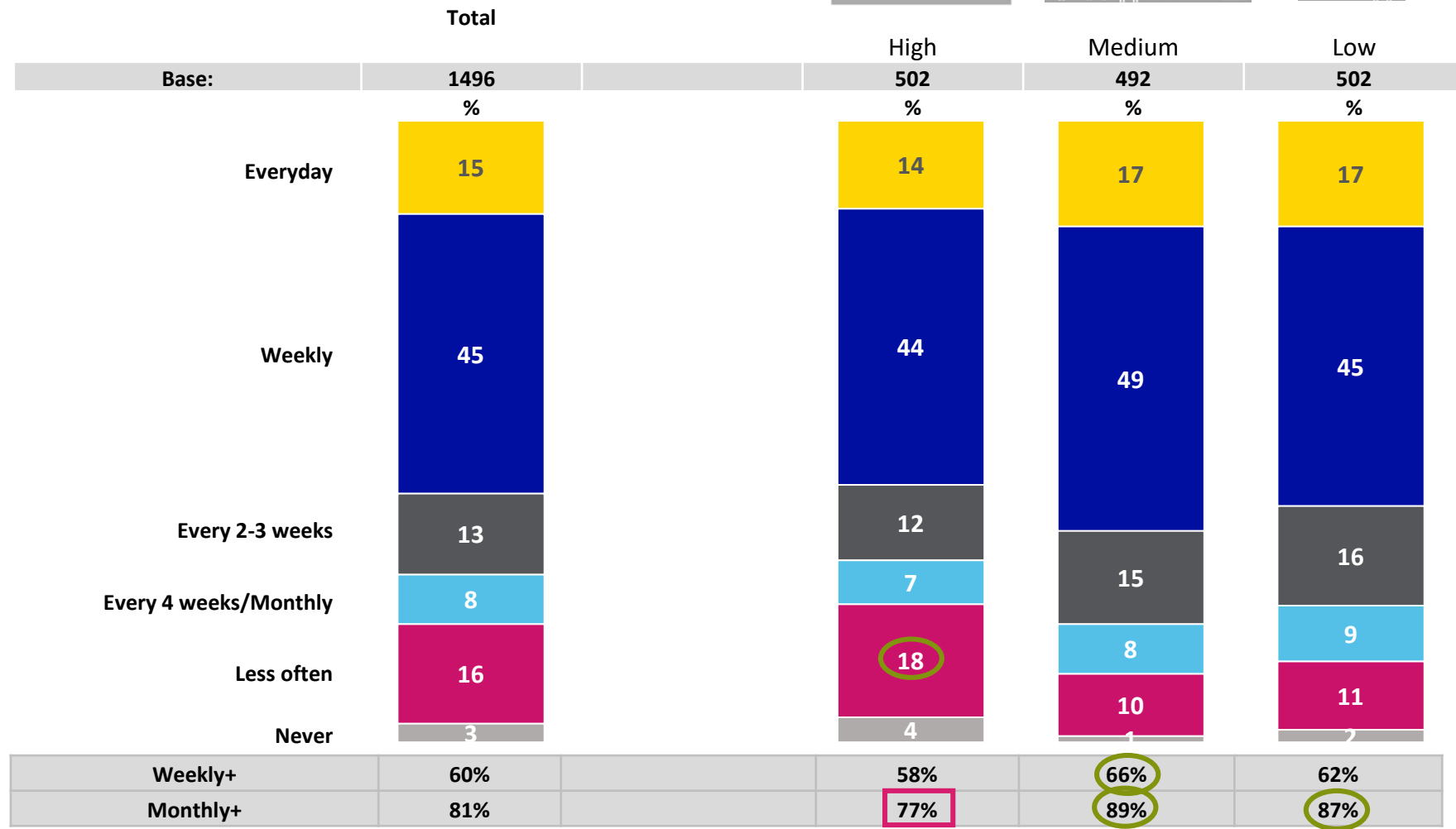
**Post Received:
Standard Letters**

Frequency of receiving standard letter post x samples

Base: All adults aged 18+

 Sig higher vs total
 Sig lower vs total

Population Density



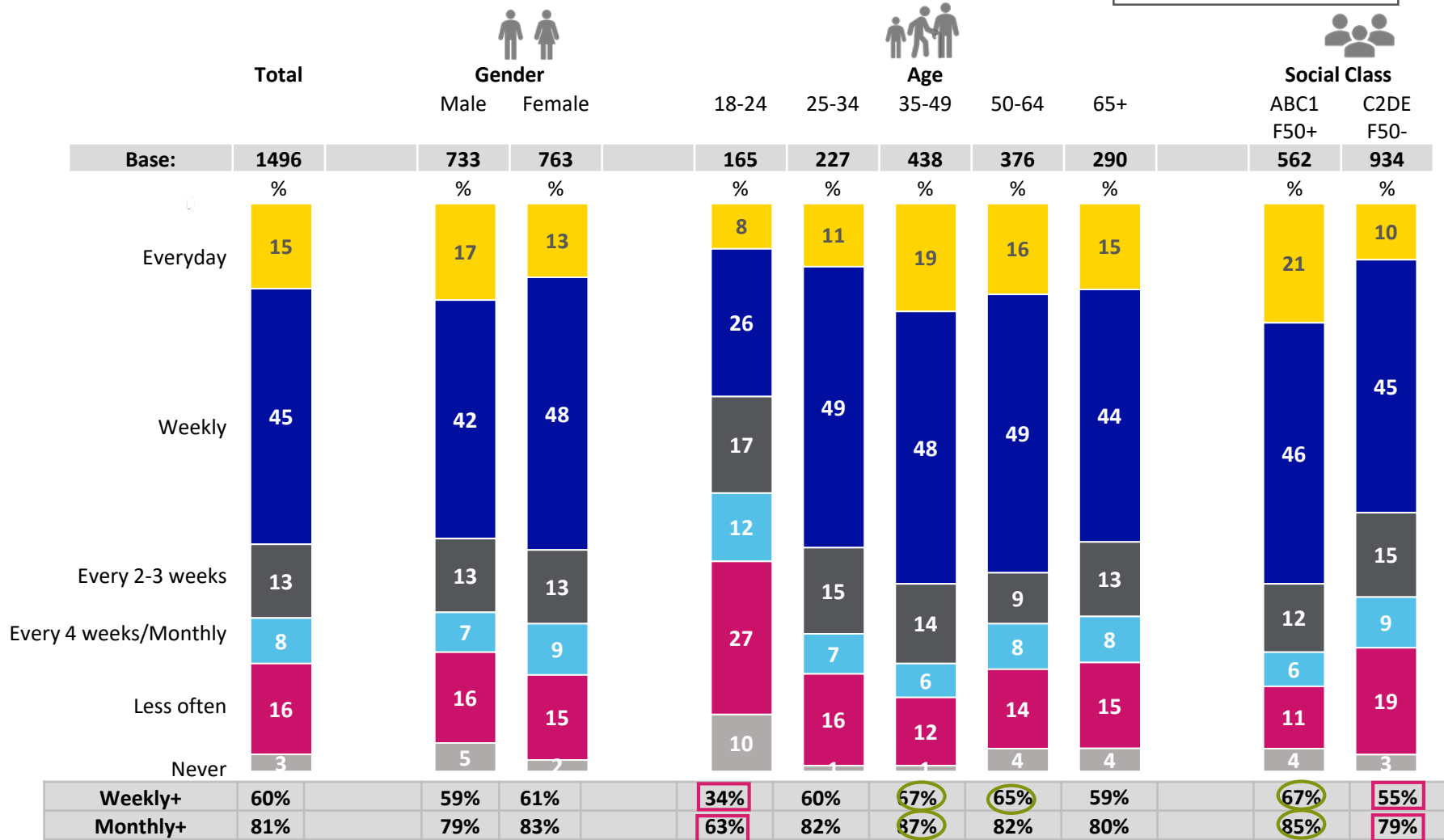
3 in 5 claim to receive standard letter post on a weekly basis. Among High density area respondents 1 in 5 claim to receive standard letter post less often than monthly. Medium density area consumers claim most frequent receipt of standard letter mail.

Q1a - Now thinking specifically about the personal post you receive to your home, on average how frequently do you receive a standard letter?

Frequency of receiving standard letter post x demographics

Base: All adults aged 18+

 Sig higher vs total
 Sig lower vs total



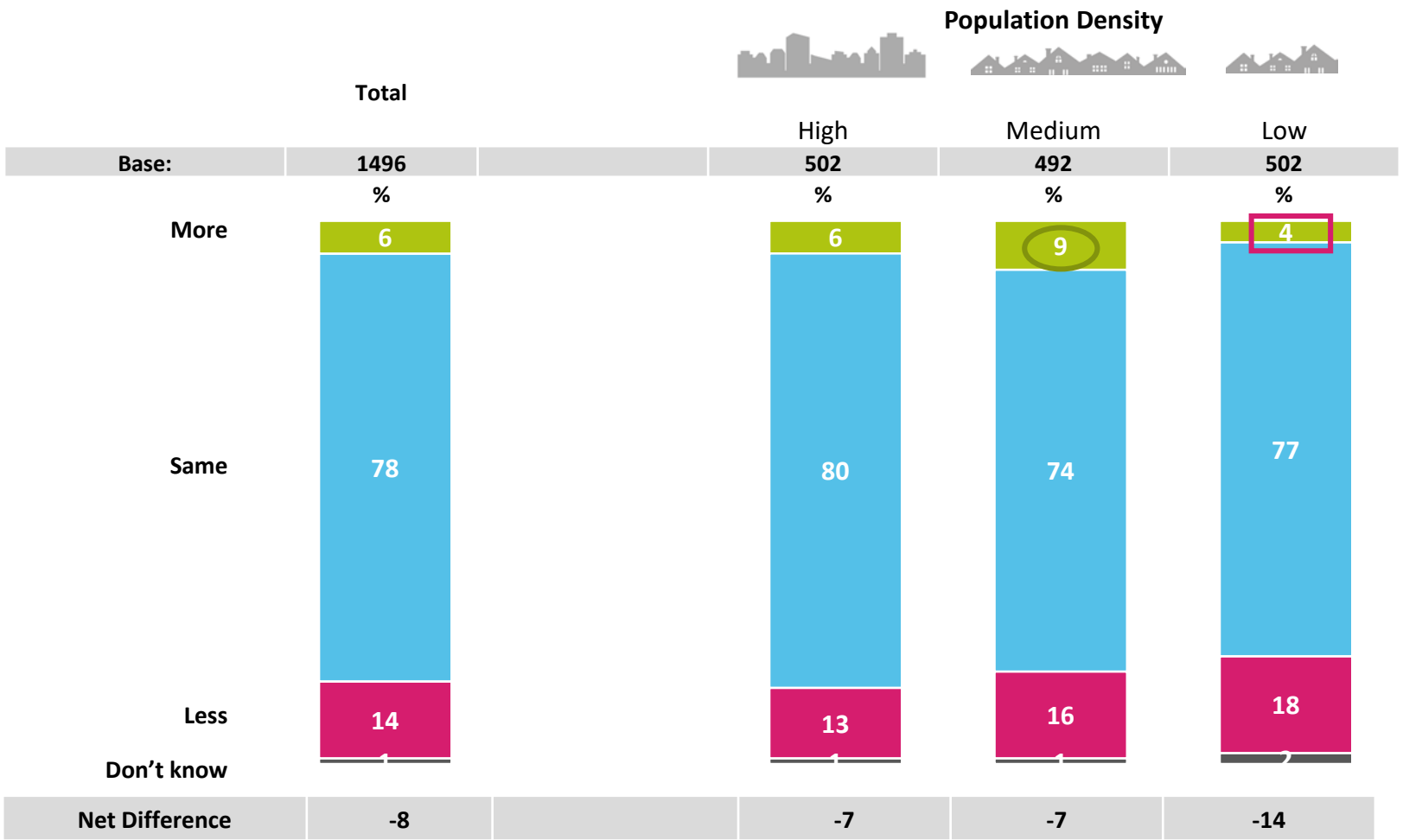
The youngest age cohort (U25s) claim the lowest frequency of receiving standard letter post, while the 35-65 age group and ABC1s claim the highest.

Q1a - Now thinking specifically about the personal post you receive to your home, on average how frequently do you receive a standard letter?

Frequency of receiving standard letter mail versus previous year x samples

○ Sig higher vs total
□ Sig lower vs total

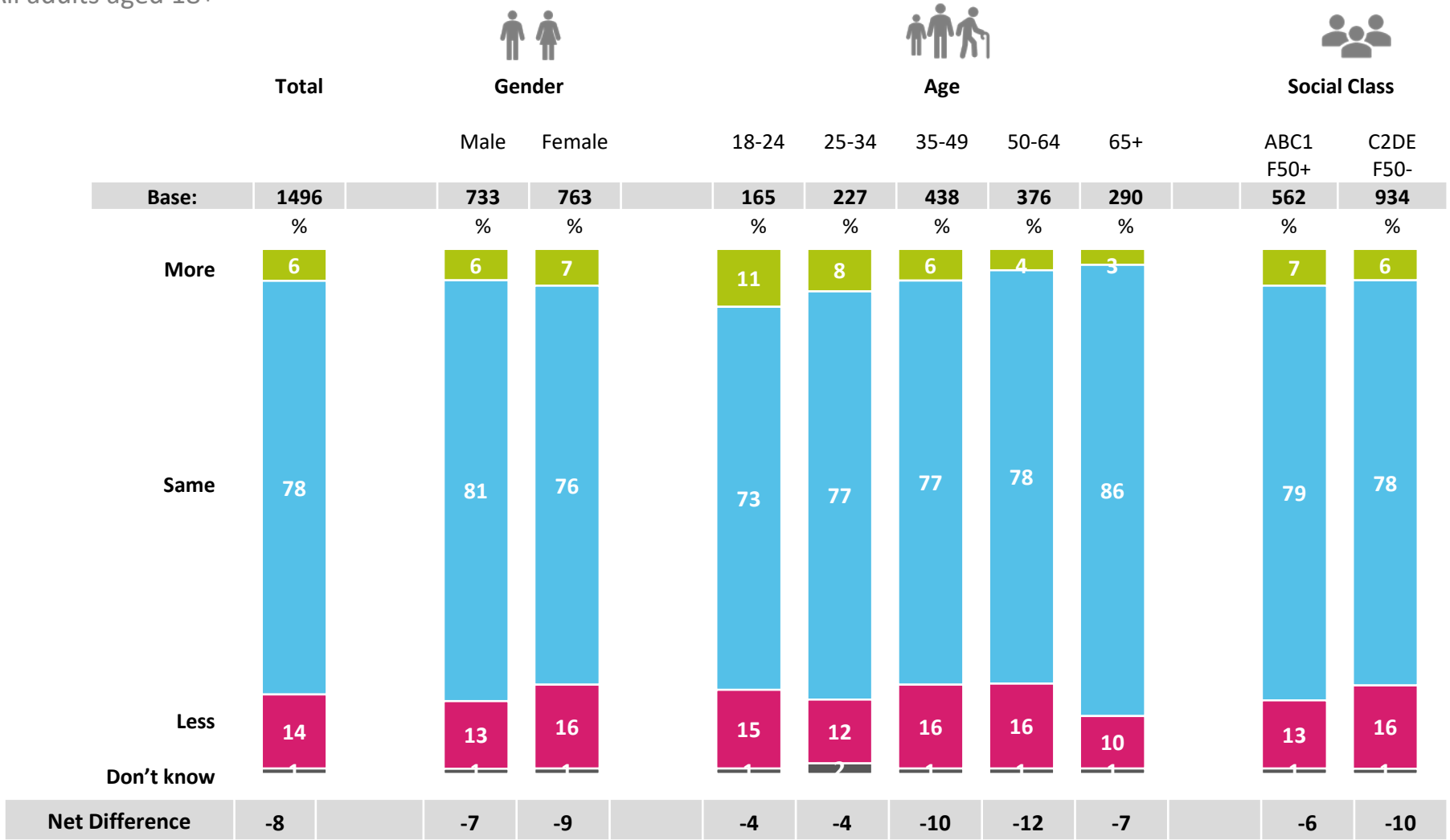
Base: All adults aged 18+



4 in 5 claim to receive the same amount of standard letter mail versus the previous year, however net difference indicates a decline overall.

Frequency of receiving standard letter mail versus previous year x demographics

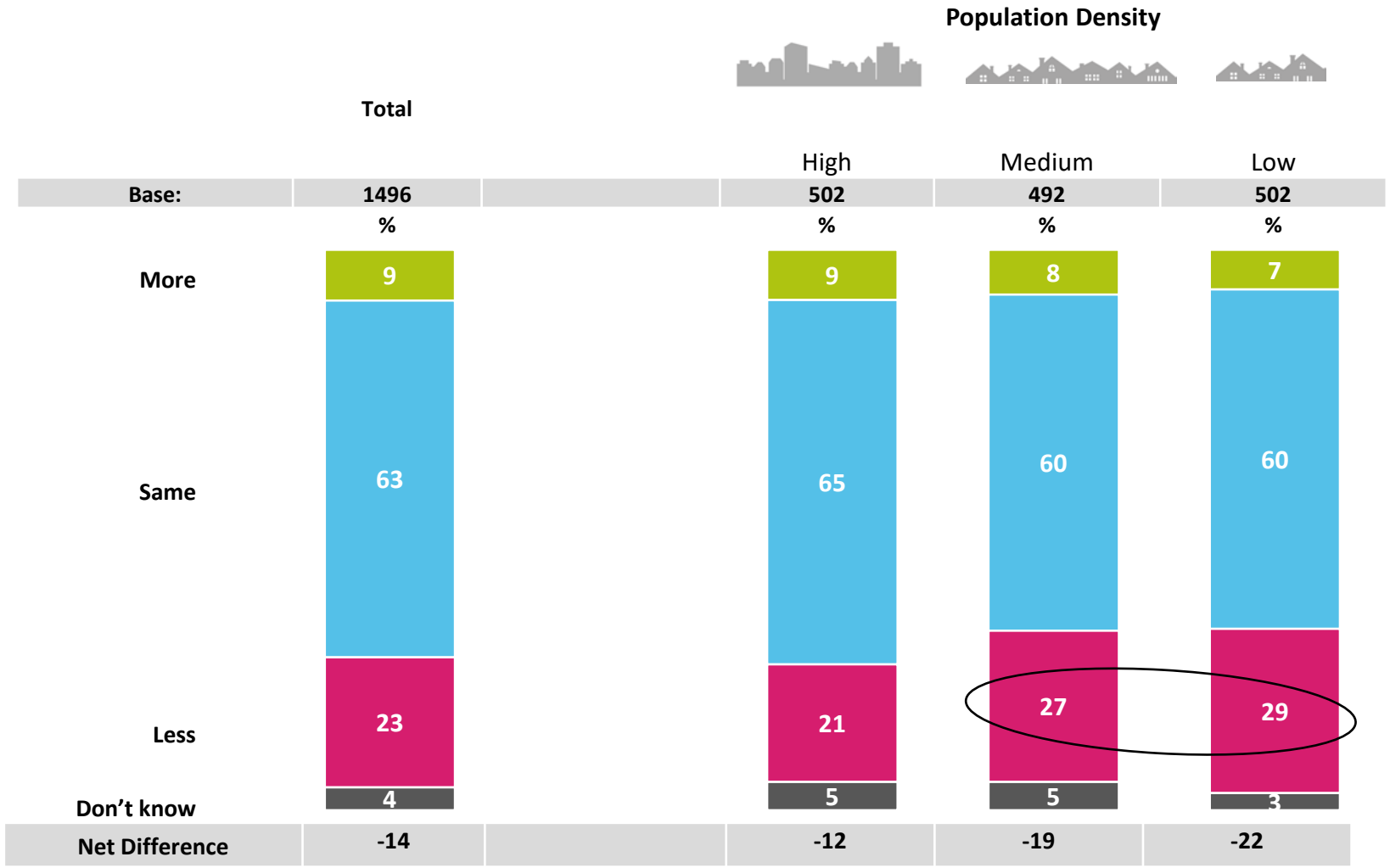
Base: All adults aged 18+



Across demographics net difference indicates a decline in the receipt of standard letter mail.

Frequency of receiving standard letter mail versus 3 years ago x Samples

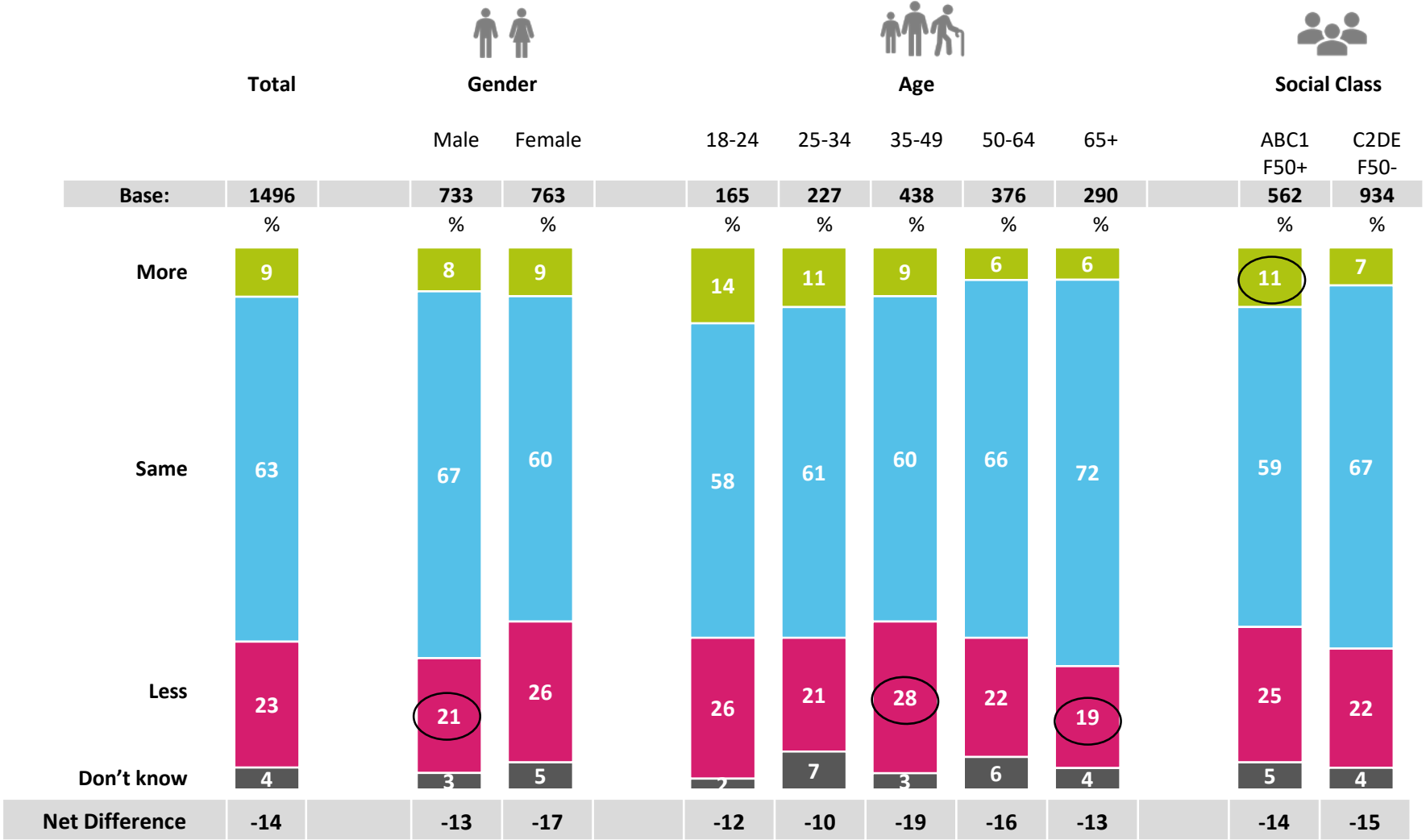
Base: All adults aged 18+



3 in 5 claim they are receiving the same amount of standard mail since 3 years ago, while 1 in 4 claim to be receiving less. Net difference indicated the most substantial decline in the more rural areas.

Frequency of receiving standard letter mail versus 3 years ago x demographics

Base: All adults aged 18+



The younger age cohorts are most likely to claim they are receiving more mail versus 3 years ago -again lifestage would be a factor. Nevertheless, a decline is evident overall.

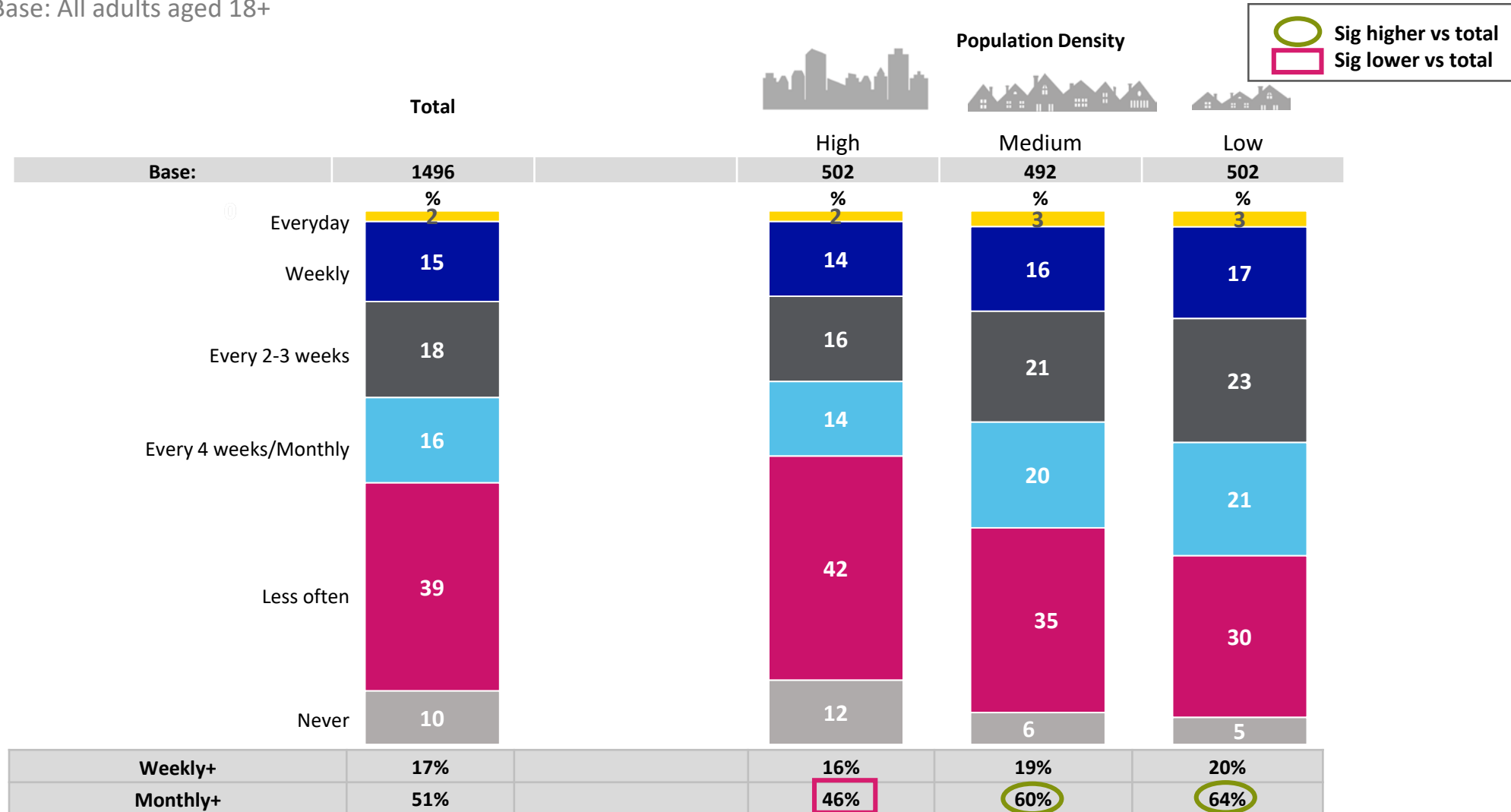
Q2c letter - For a standard letter, please tell me if you are receiving more, less or about the same compared to this time 3 years ago?



Sending Post:
Standard Letter

Frequency of sending standard letter post x sample

Base: All adults aged 18+





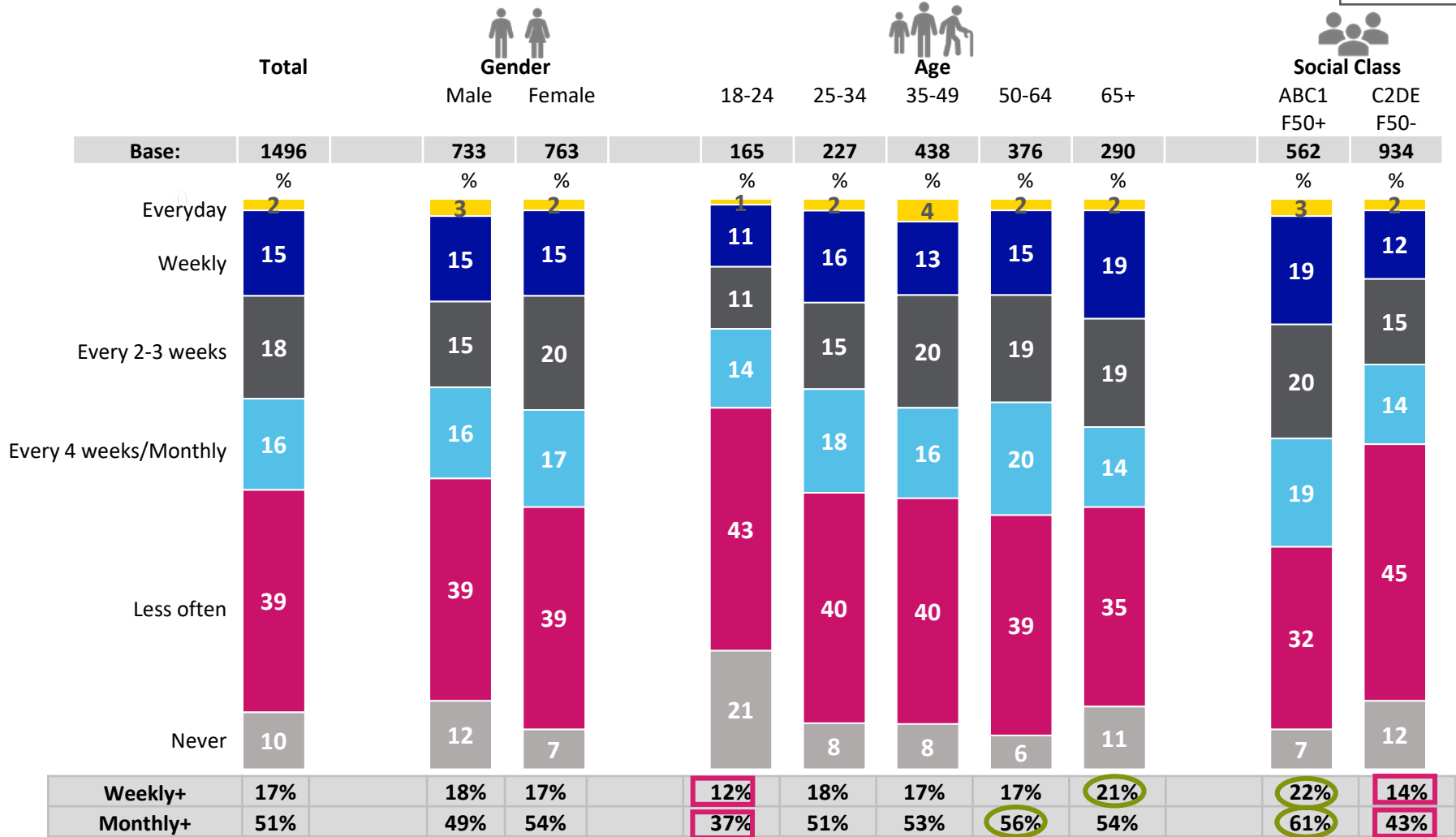
Less than 1 in 5 claim to send standard letter mail on a weekly+ basis. Those living in the highest populated areas claim to be the least frequent senders of mail, while those in the most rural areas claim to send mail most frequently. Note those who mail most receive frequently also are most frequent senders.

Q9a - Again thinking specifically about your own personal post, on average how frequently do you send a standard letter either via An Post or any courier service?

Frequency of sending standard letter post x demographics

Base: All adults aged 18+

 Sig higher vs total
 Sig lower vs total





The older age cohort (65+) and ABC1s claim to send the highest proportion of weekly+ mail; while the younger age cohort (U25s) and C2DE's claim to send standard mail least often.



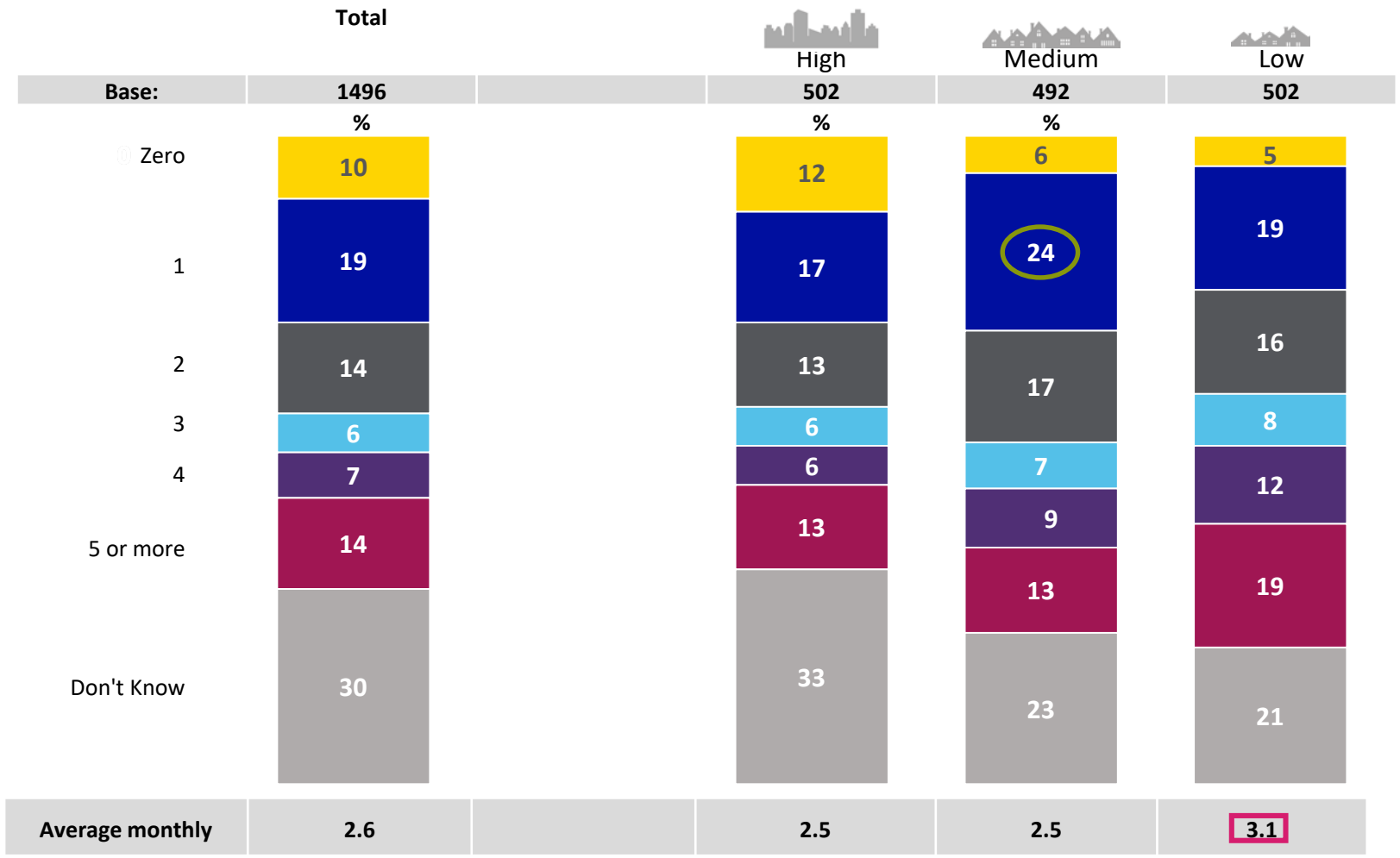
Q9a - Again thinking specifically about your own personal post, on average how frequently do you send a standard letter either via An Post or any courier service?

Average number of standard letters sent per month x samples


 Sig higher vs total
 Sig lower vs total



Base: All adults n=1,496

Population Density



On average consumers claim to send 2.6 letters per month. Rising to 3 in the most rural areas. Also 3 in 10 do not know how many letters they send in an average month

 Q10ai_1_other - In your personal capacity; on average how many standard letters do you send during a typical week? Number
 Q10biii_1_other - In your personal capacity; on average how many standard letters do you send during a typical month? Number

 Sig higher vs total
 Sig lower vs total



Social Class

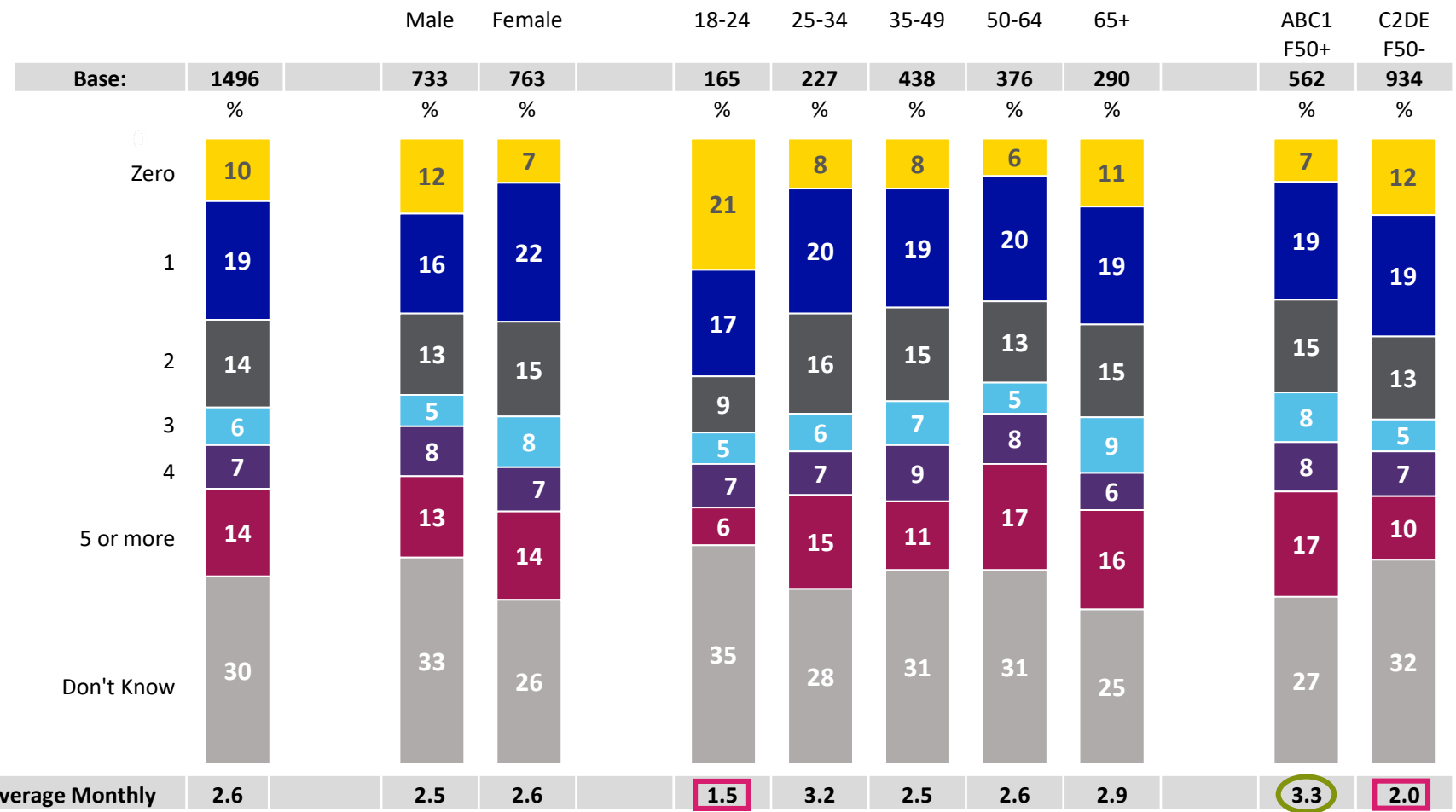


Gender




Age

Total



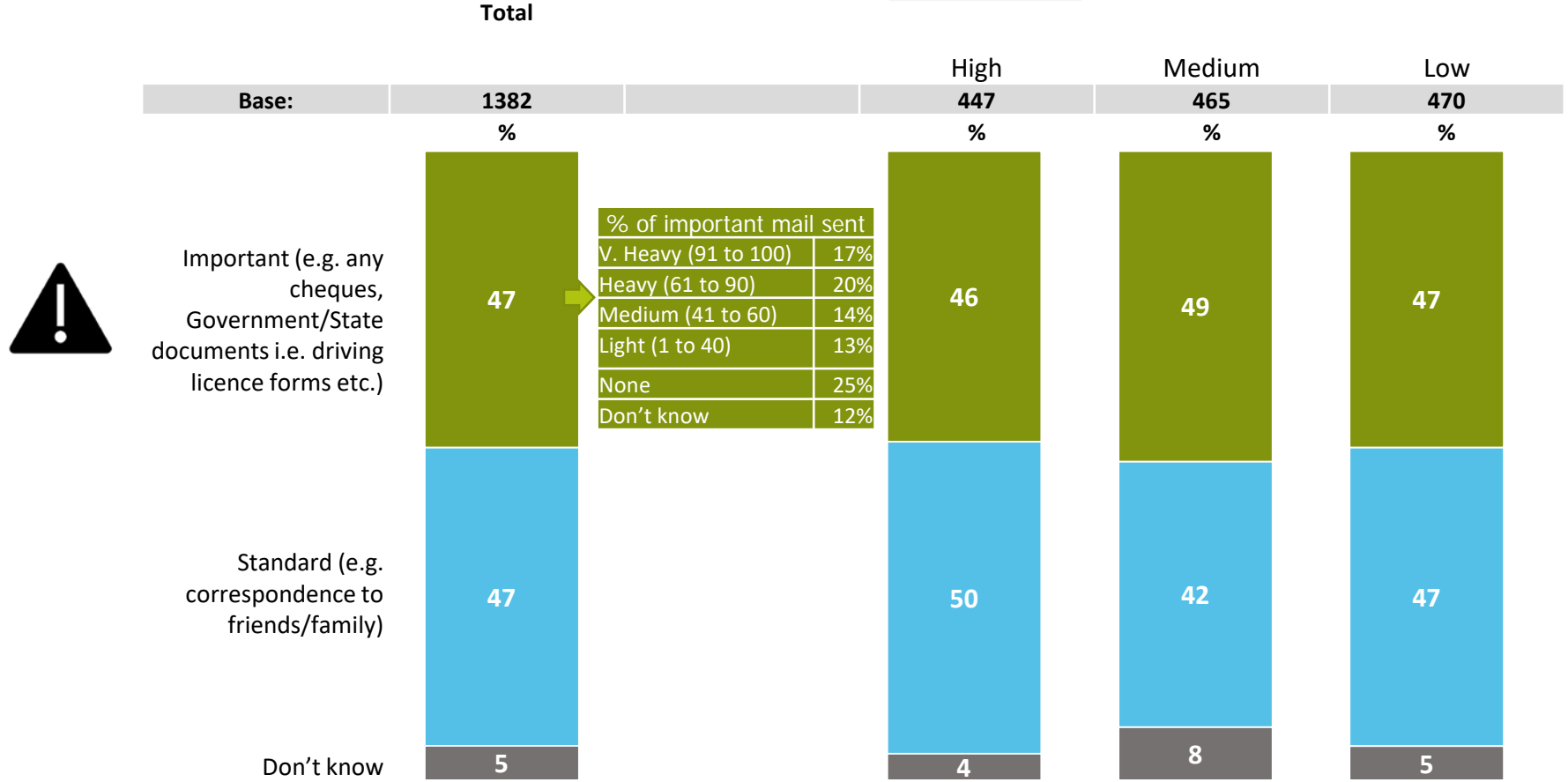
The average number of letters sent per month increases to 3 among ABC1s.

 Q10ai_1_other - In your personal capacity; on average how many standard letters do you send during a typical week? Number
 Q10biii_1_other - In your personal capacity; on average how many standard letters do you send during a typical month? Number

Proportion of important x standard mail x sample

Base: All who send standard post 1,382

Population Density



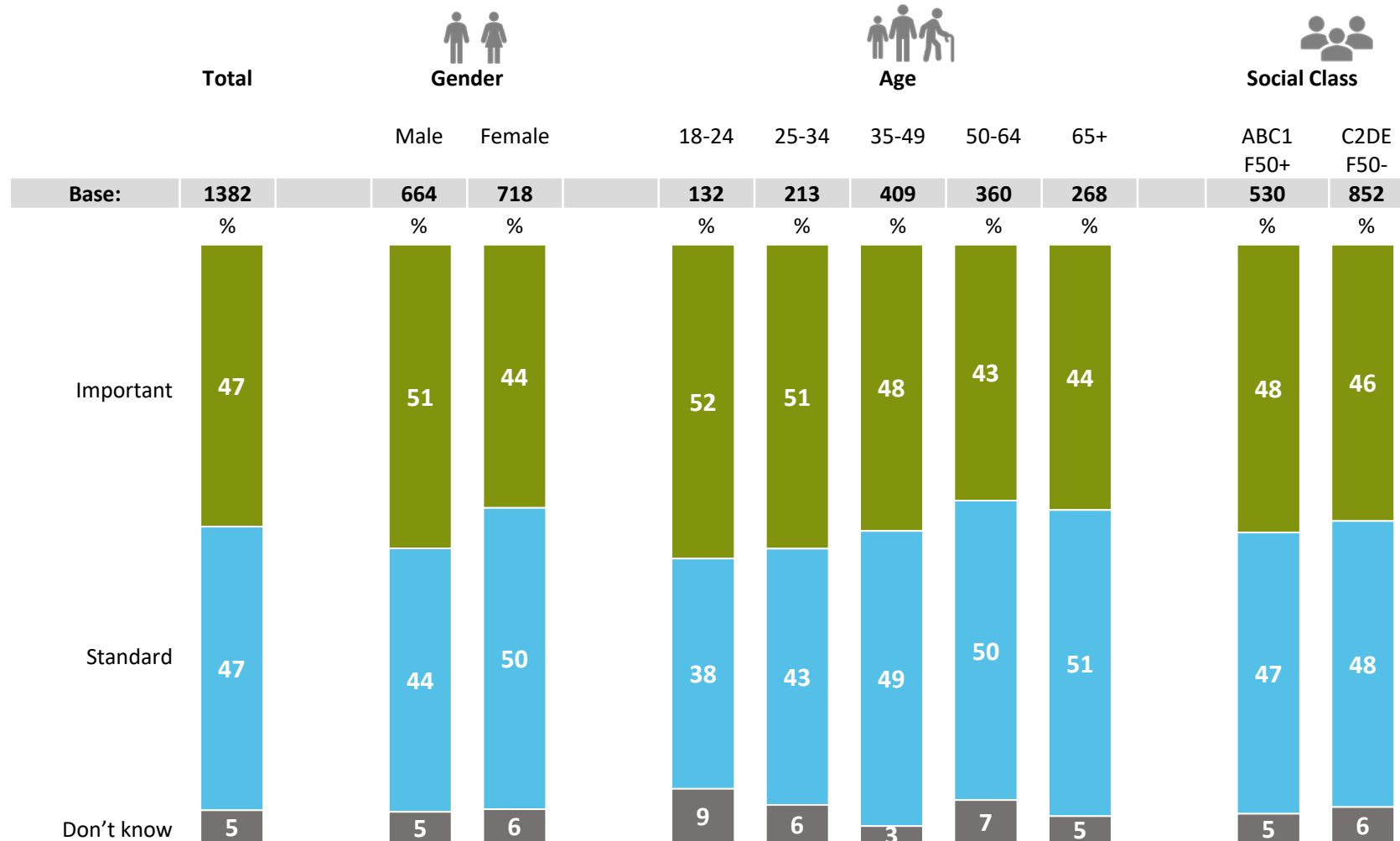
Consumers claim to send a similar amount of important vs standard mail

Q11 - what percentage would you consider to be important mail e.g. any cheques, Government / State documents?
 Q11 - what percentage would you consider to be standard mail e.g. correspondence to friends/family?



Proportion of important x standard mail x demographics

Base: All who send standard post 1,382



Males and the younger age demographic claim to send a slightly higher proportion of important mail, while females and the older age cohort claim to send slightly more standard mail.

Q11 - what percentage would you consider to be important mail e.g. any cheques, Government / State documents?
 Q11 - what percentage would you consider to be standard mail e.g. correspondence to friends/family?

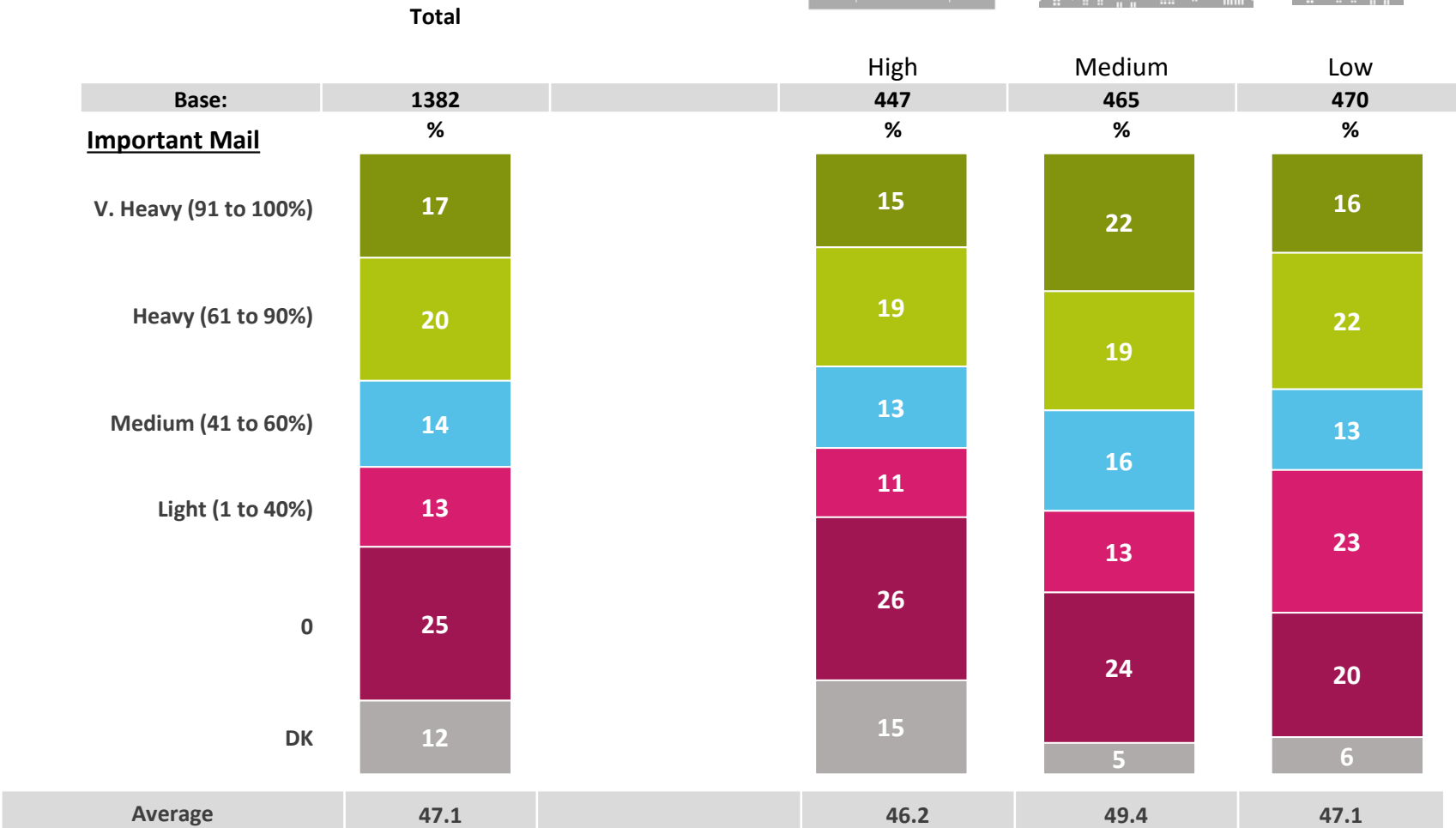


Defining heavy, medium and light senders of important mail x Samples



Base: All who send standard post 1,382

Population Density



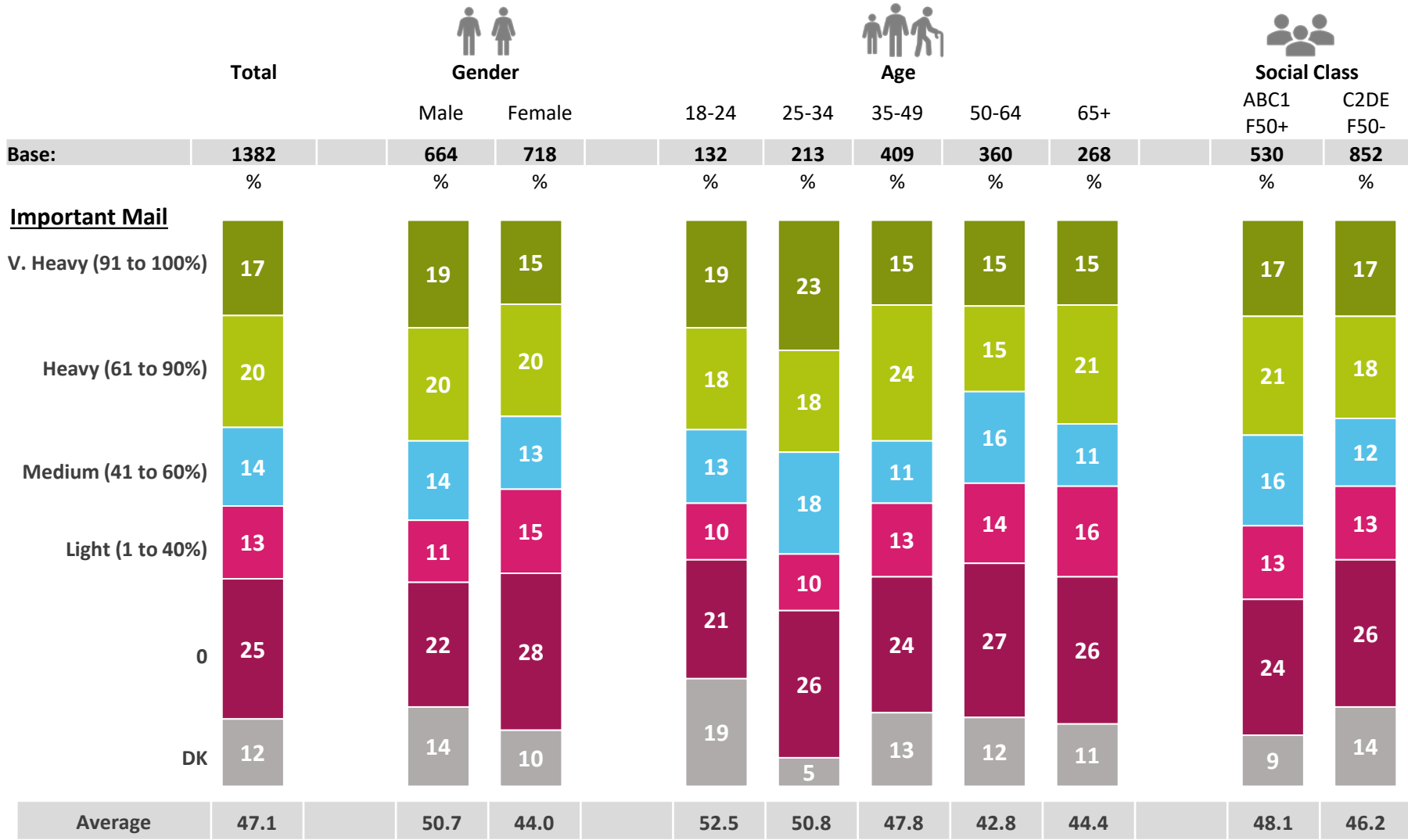
Respondents in Medium area claim to send the highest proportion of important mail.

Q11 - what percentage would you consider to be important mail e.g. any cheques, Government / State documents?
 Q11 - what percentage would you consider to be standard mail e.g. correspondence to friends/family?

Defining heavy, medium and light senders of important mail x Demographics



Base: All who send standard post 1,382

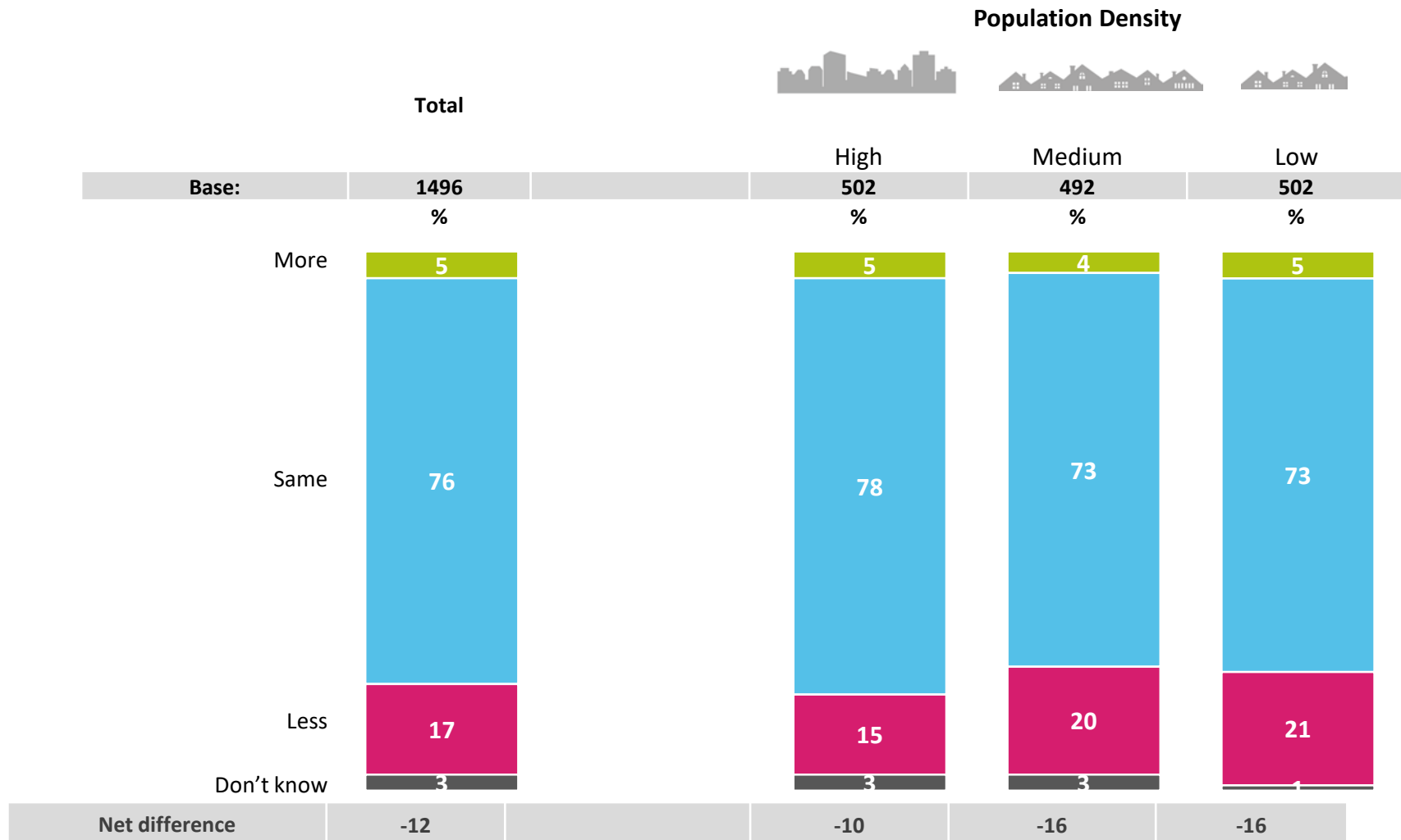


Males and the U35s claim to send the highest proportion of important mail.

Q11 - what percentage would you consider to be important mail e.g. any cheques, Government / State documents?
 Q11 - what percentage would you consider to be standard mail e.g. correspondence to friends/family?

Frequency of sending standard letter mail versus previous year x samples

Base: All adults aged 18+

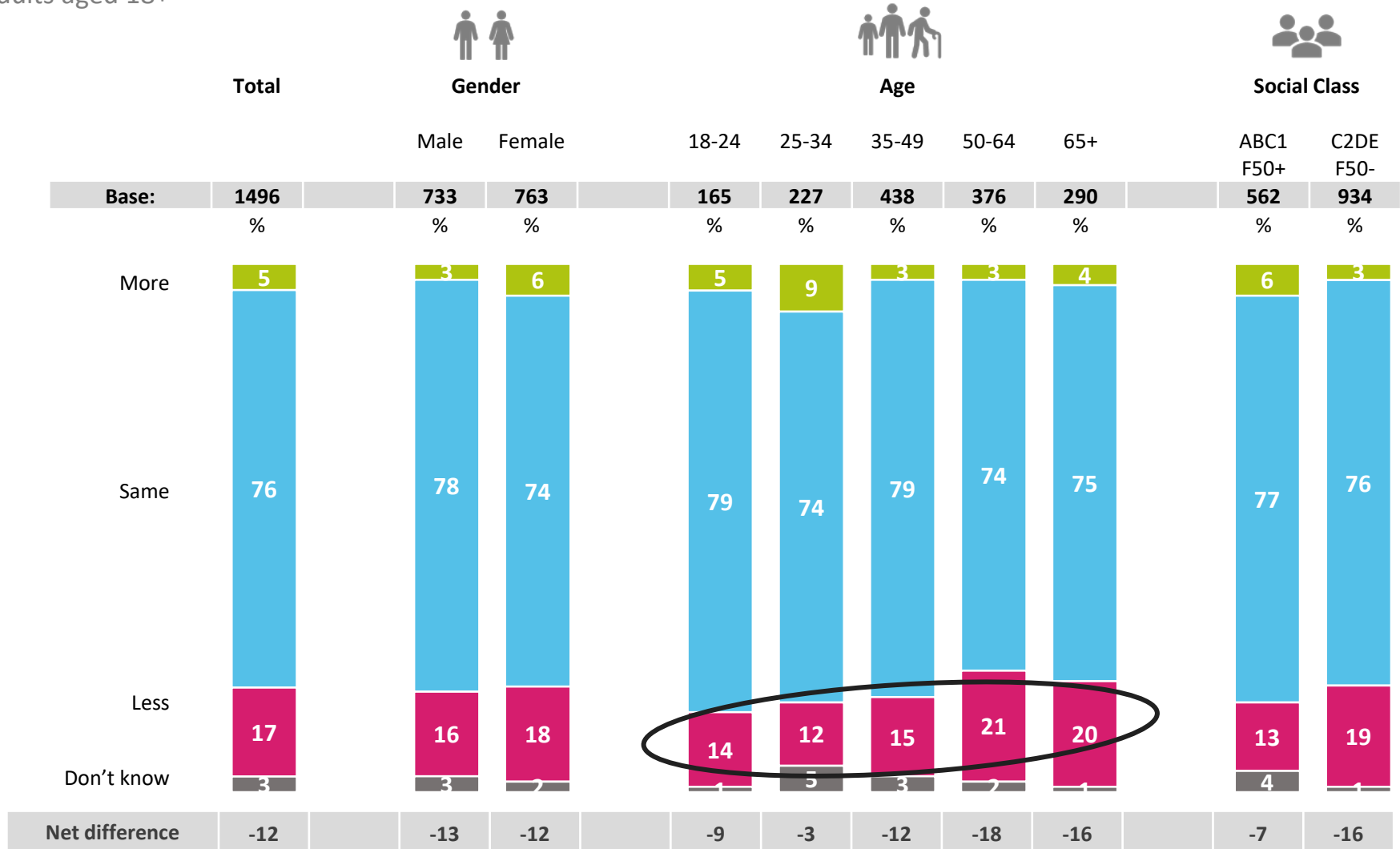


Net difference indicates a decline in the amount of standard letter post consumers have sent versus the previous year.

Frequency of sending standard letter mail versus previous year x demographics



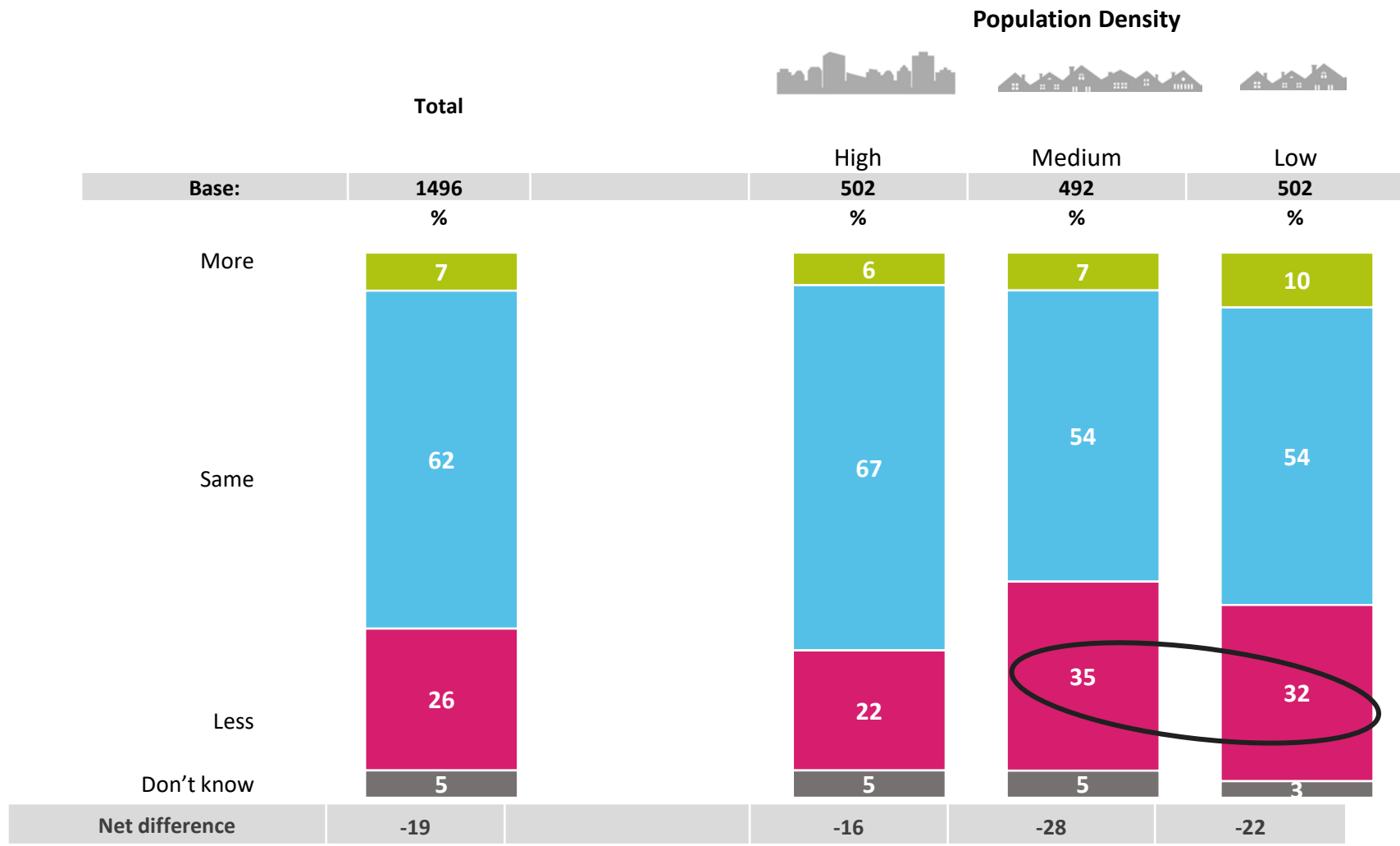
Base: All adults aged 18+



A higher proportion of the older age demographic and C2DEs claim to be sending less mail versus younger consumers, albeit marginal.

Frequency of sending standard letter mail versus 3 years ago x samples

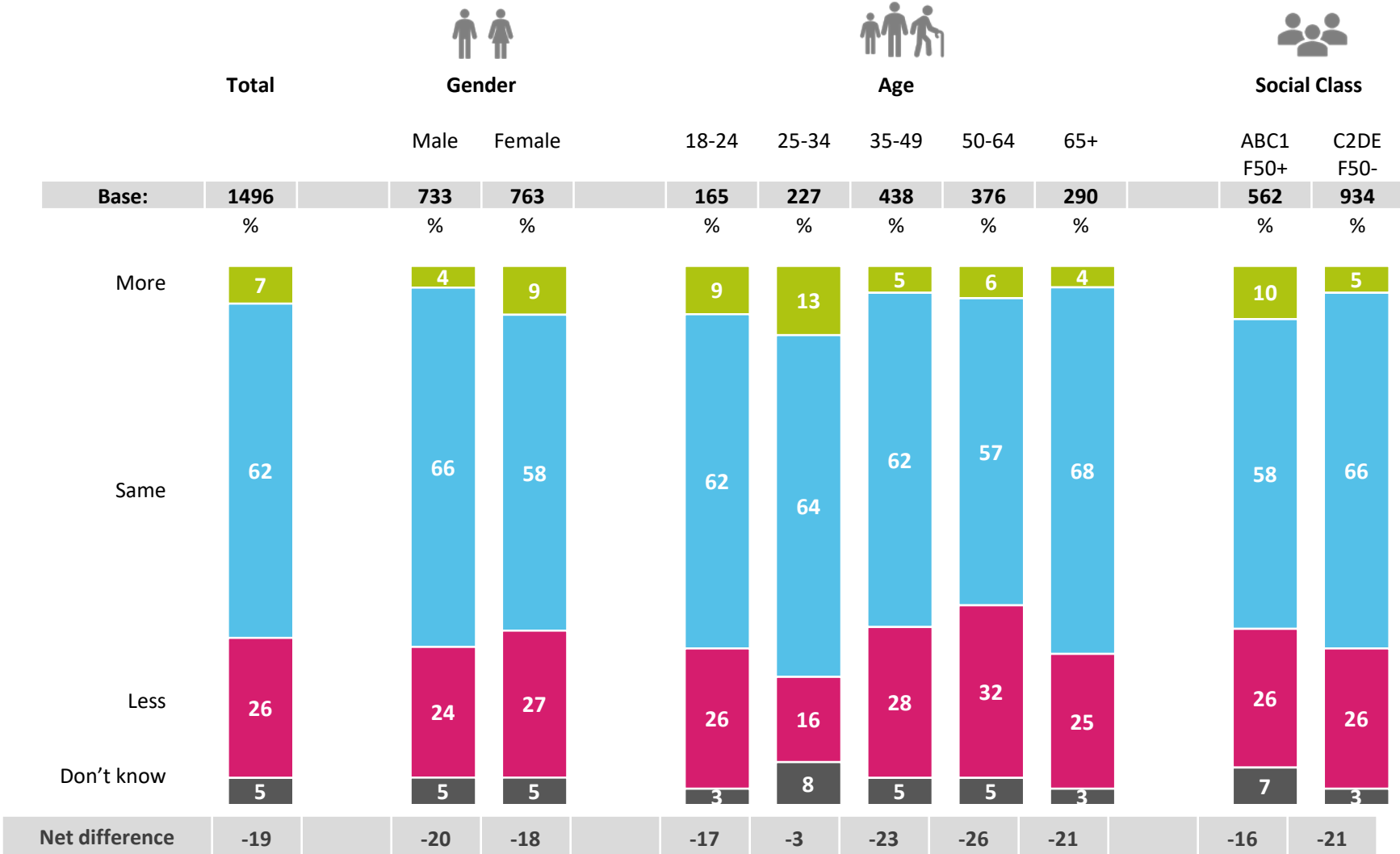
Base: All adults aged 18+



1 in 4 consumers claim to be sending less standard mail, rising to 1 in 3 in more rural areas.

Frequency of sending standard letter mail versus 3 years ago x demographics

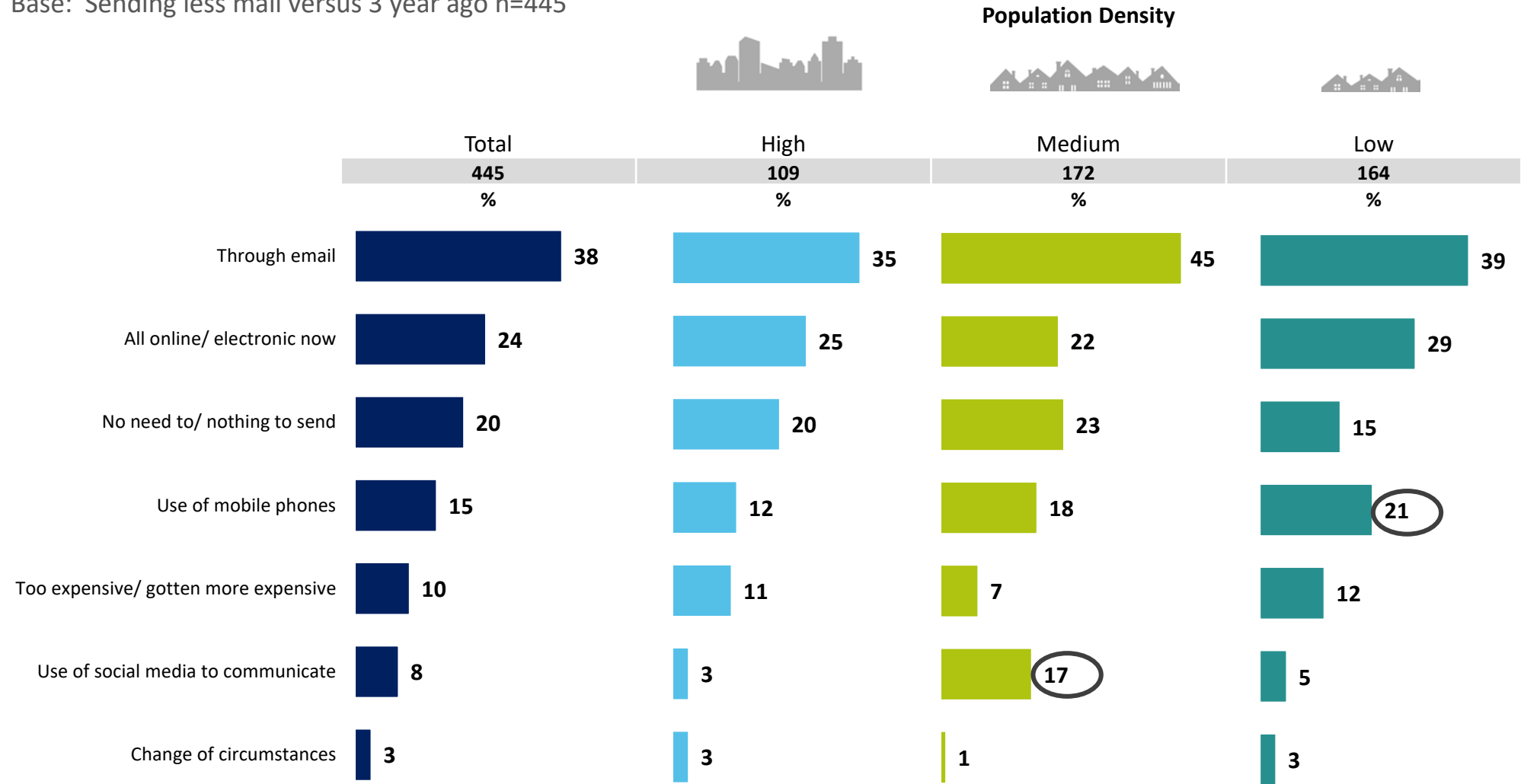
Base: All adults aged 18+



Decline across most cohorts.

Rationale for sending less standard letter post versus 3 years ago x samples

Base: Sending less mail versus 3 year ago n=445



**Technology is the main reason given for sending less standard letter post versus three years ago.
Just 1 in 10 referenced cost as a factor.**

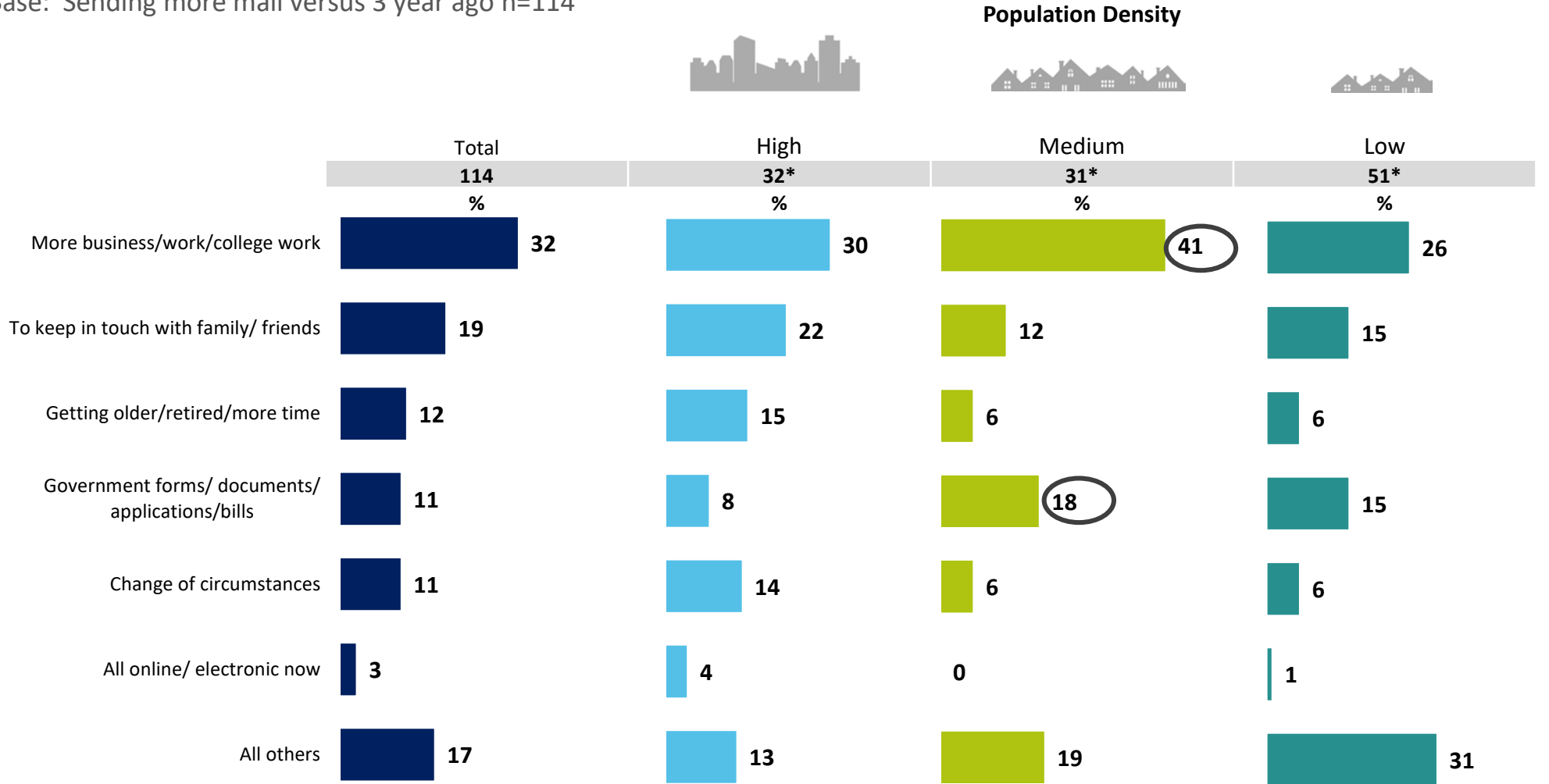


Q12c - And why are you sending more/less standard letter post compared to this time three years ago? Please give as much detail as possible

Rationale for sending more standard letter post versus 3 years ago x samples



Base: Sending more mail versus 3 year ago n=114



*NB: Small base sizes

Lifestage appears to be a key impact on mail sent as more business/work/college work is the main reasons given for sending more mail vs three years ago. Government forms/documents is also a more of factor for Medium area consumers.




Q12c - And why are you sending more/less standard letter post compared to this time three years ago? Please give as much detail as possible

Satisfaction with the cost of sending standard letter post x samples

Base: All adults aged 18+

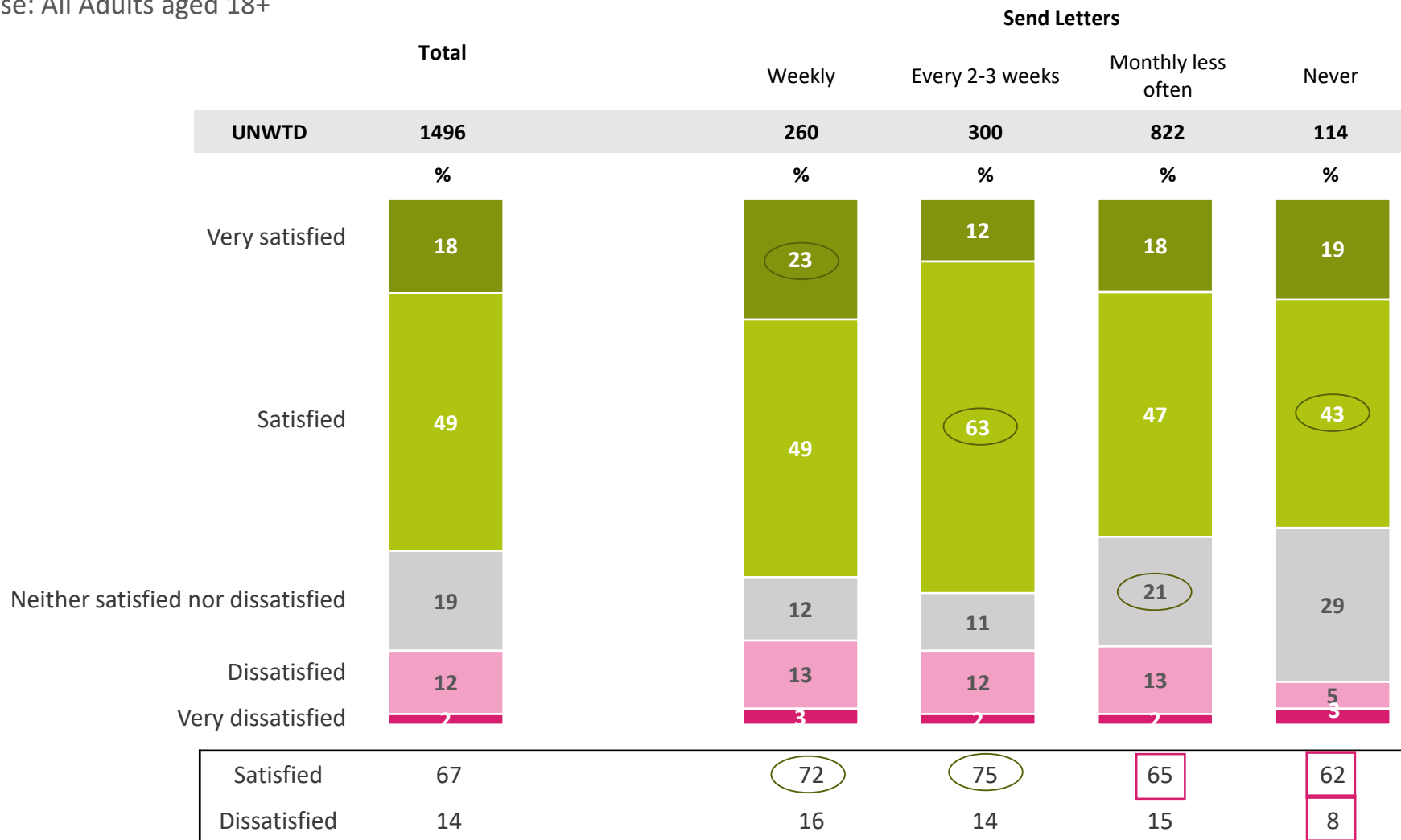


67% of consumers are satisfied with the cost of sending standard letter post. However people generally don't send much mail. Satisfaction among medium density area respondents is lower (59%).

 Q14 - Now thinking about when you send standard letter post via An Post only, how satisfied are you with the following?
- Cost of sending standard letter post

Satisfaction with the cost of sending standard letter post X Frequency of sending

Base: All Adults aged 18+

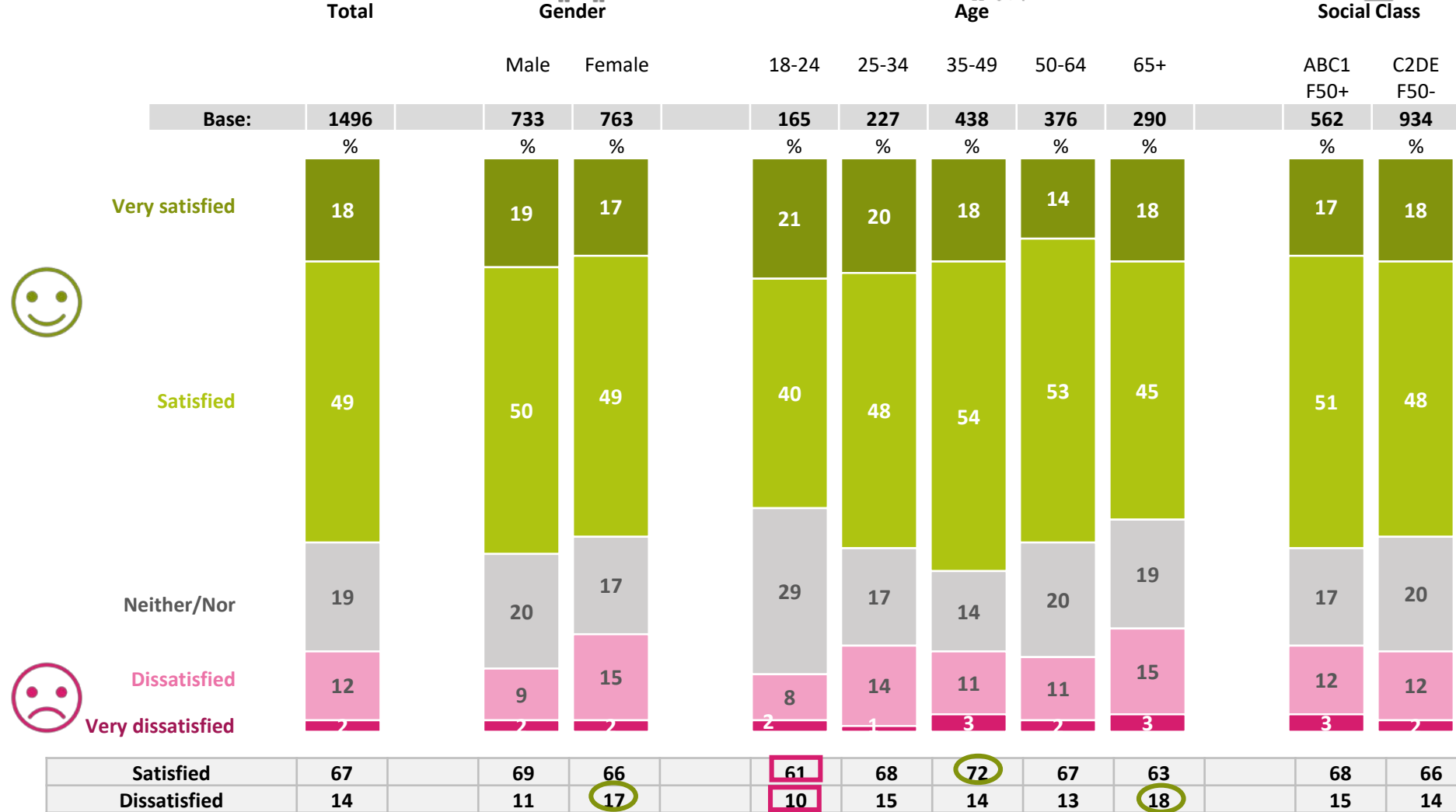


More frequent senders are more satisfied with the cost of sending letters, those sending less letters are less satisfied (more in the neither satisfied nor dissatisfied zone).

Satisfaction with the cost of sending standard letter post x demographics

B&A

Base: All adults aged 18+



The 39-49 age group claims the highest level of satisfaction with the cost of sending standard letter post, while the older age cohort and females a higher level of dissatisfaction.

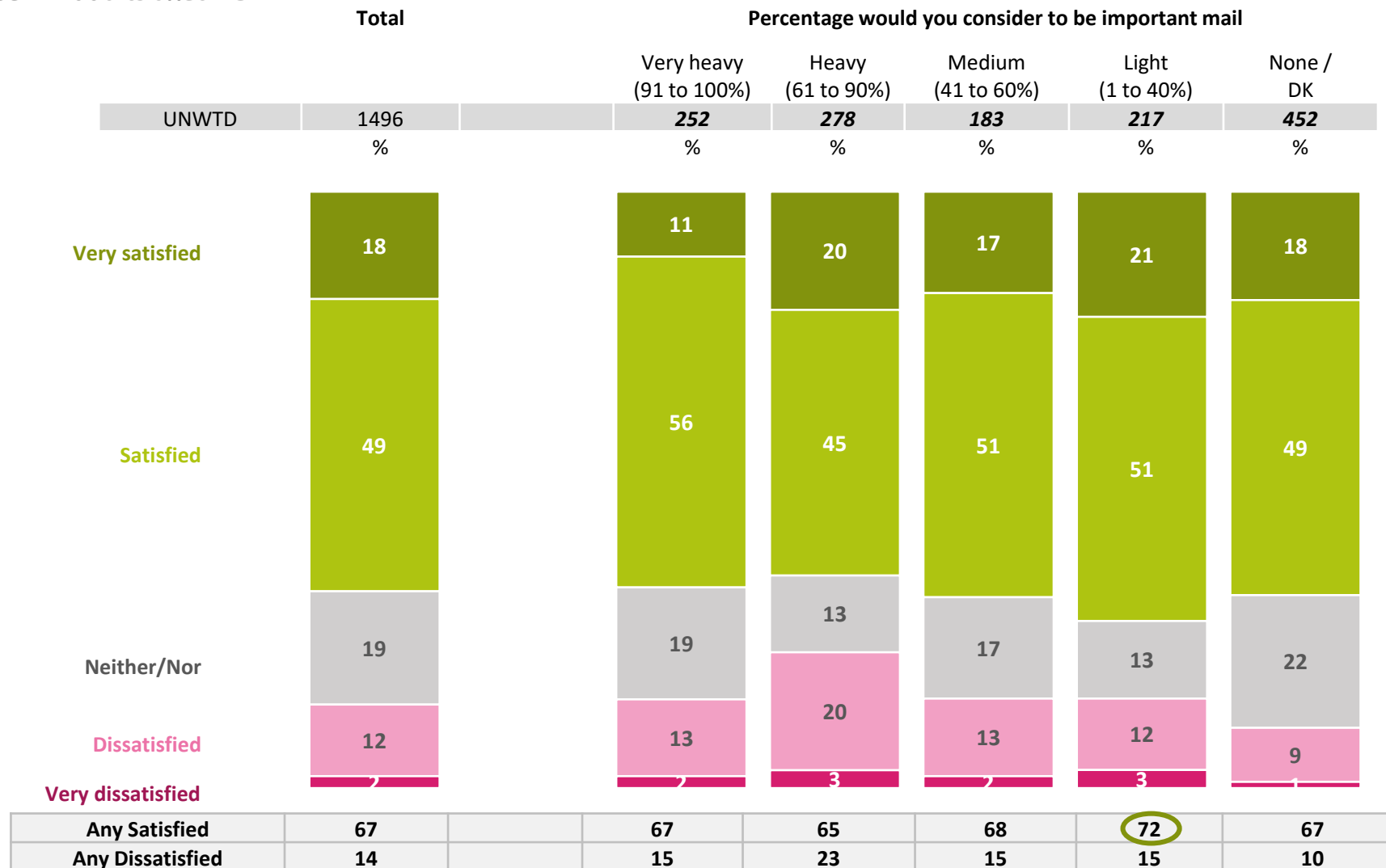
Q14 - Now thinking about when you send standard letter post via An Post only, how satisfied are you with the following?
 - Cost of sending standard letter post

Satisfaction with cost of sending mail x importance of mail sent

○ Sig higher vs total
□ Sig lower vs total



Base: All adults aged 18+



Little variation in the satisfaction with cost by the proportion of important mail being sent.



Q14 - Now thinking about when you send standard letter post via An Post only, how satisfied are you with the following? - Cost of sending standard letter post

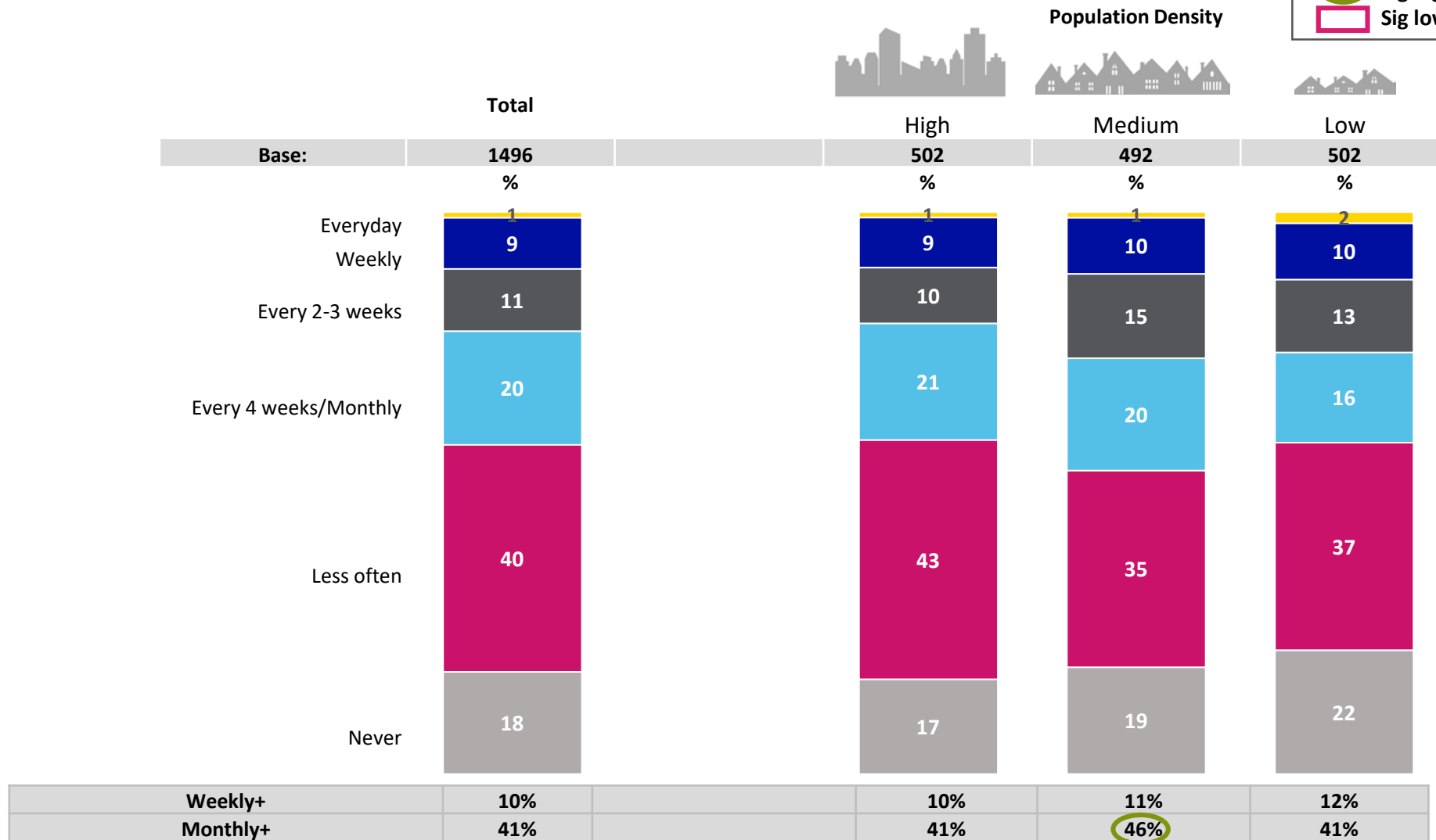


Post Received:
Packages/Parcels

Frequency of receiving packages/parcels x samples

Base: All adults aged 18+



 Sig higher vs total
 Sig lower vs total



1 in 10 claim to receive packages/parcels on a weekly basis, while 2 in 5 receive parcels at least monthly – higher among Medium area consumers (most frequent online purchasers).

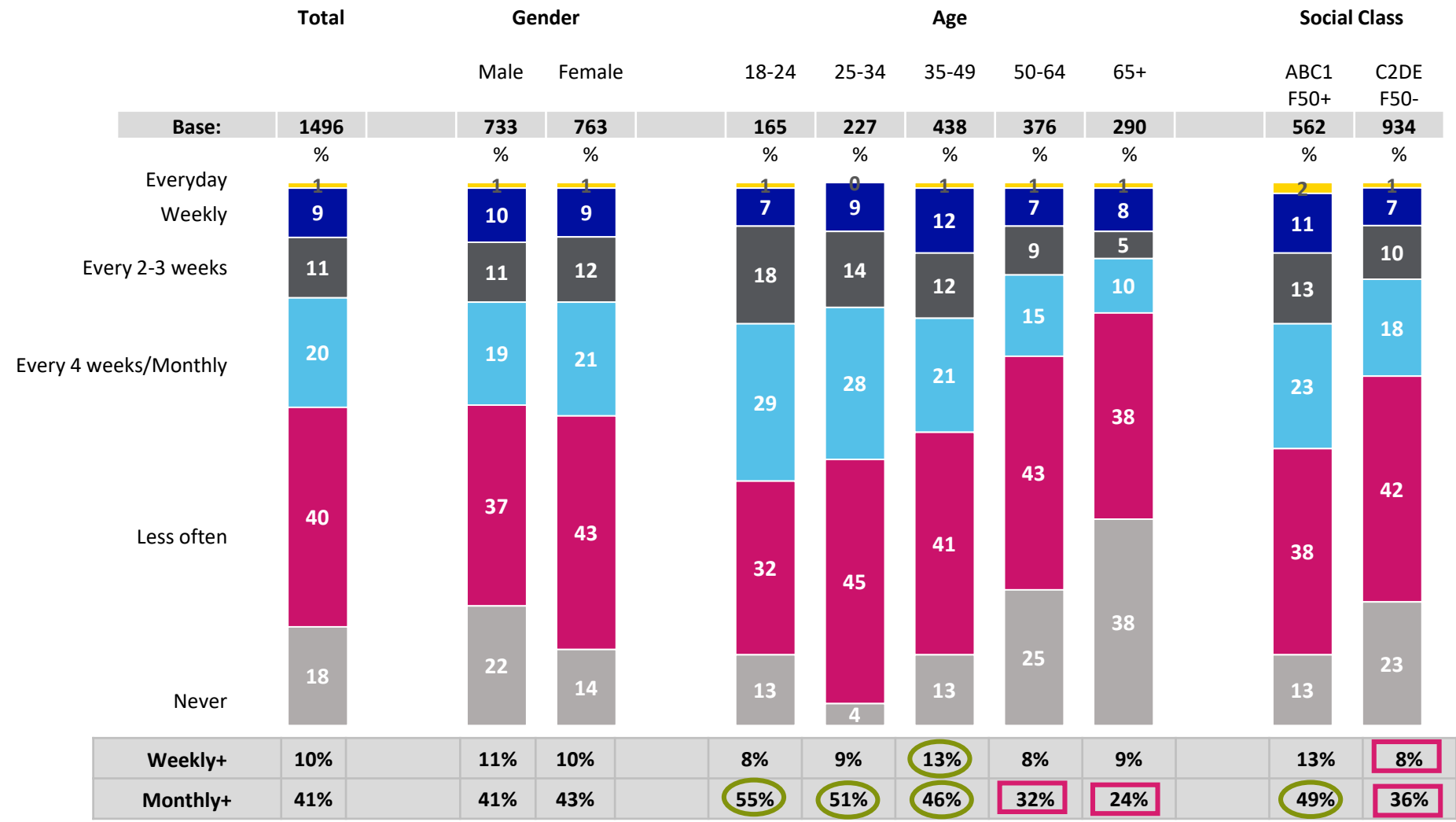
Q1b - Thinking specifically about the personal post you receive, on average how frequently do you receive packet/parcel containing goods e.g. clothing, electronics, etc.?

Frequency of receiving packages/parcels x demographics

 Sig higher vs total
 Sig lower vs total



Base: All adults aged 18+





The under 50s and ABC1s claim the highest incidence of receiving packages/parcels on a monthly+ basis.



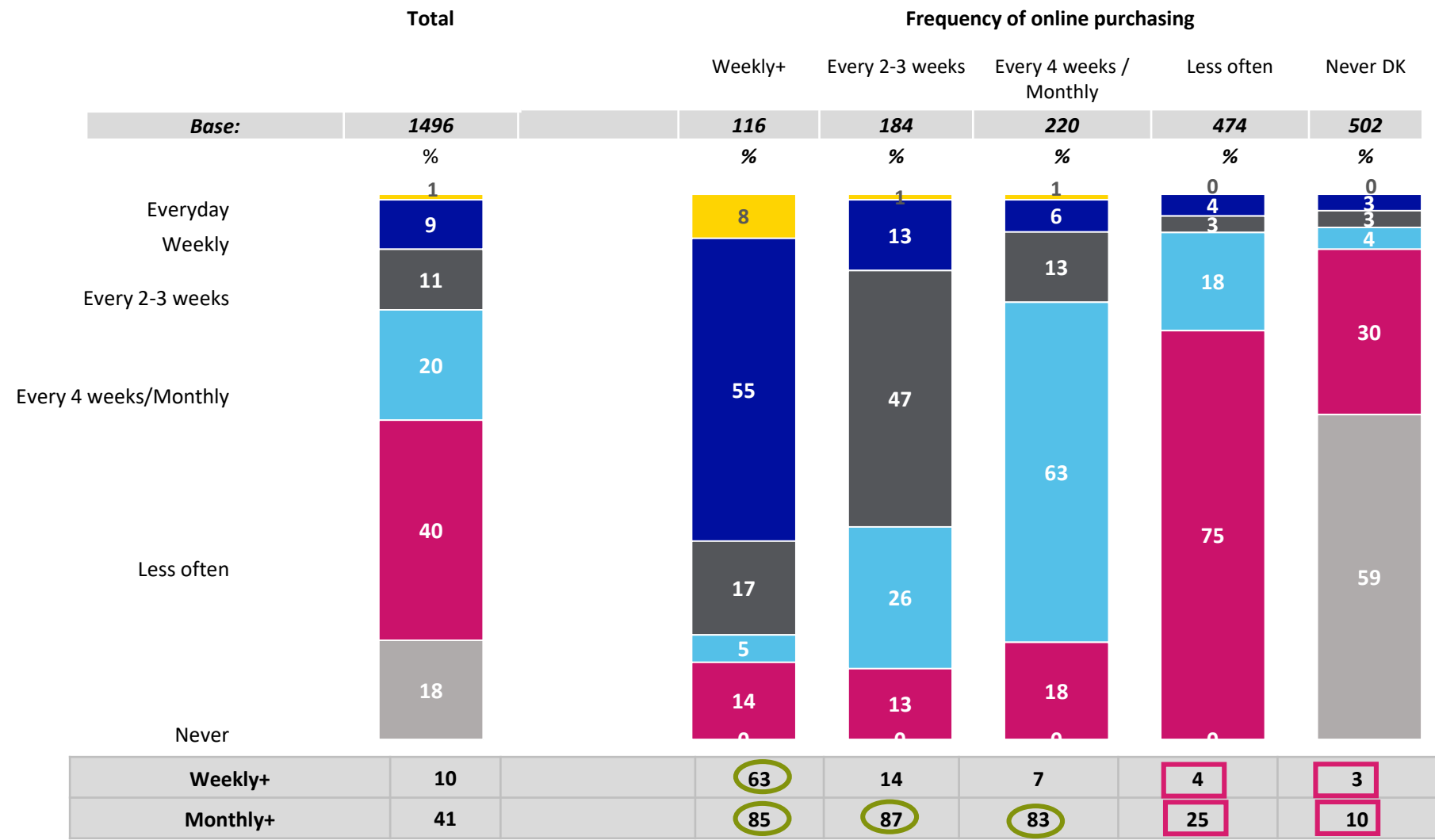
Q1b - Thinking specifically about the personal post you receive, on average how frequently do you receive packet/parcel containing goods e.g. clothing, electronics, etc.?

Frequency of receiving packages/parcels x frequency of online purchasing

 Sig higher vs total
 Sig lower vs total



Base: All adults aged 18+



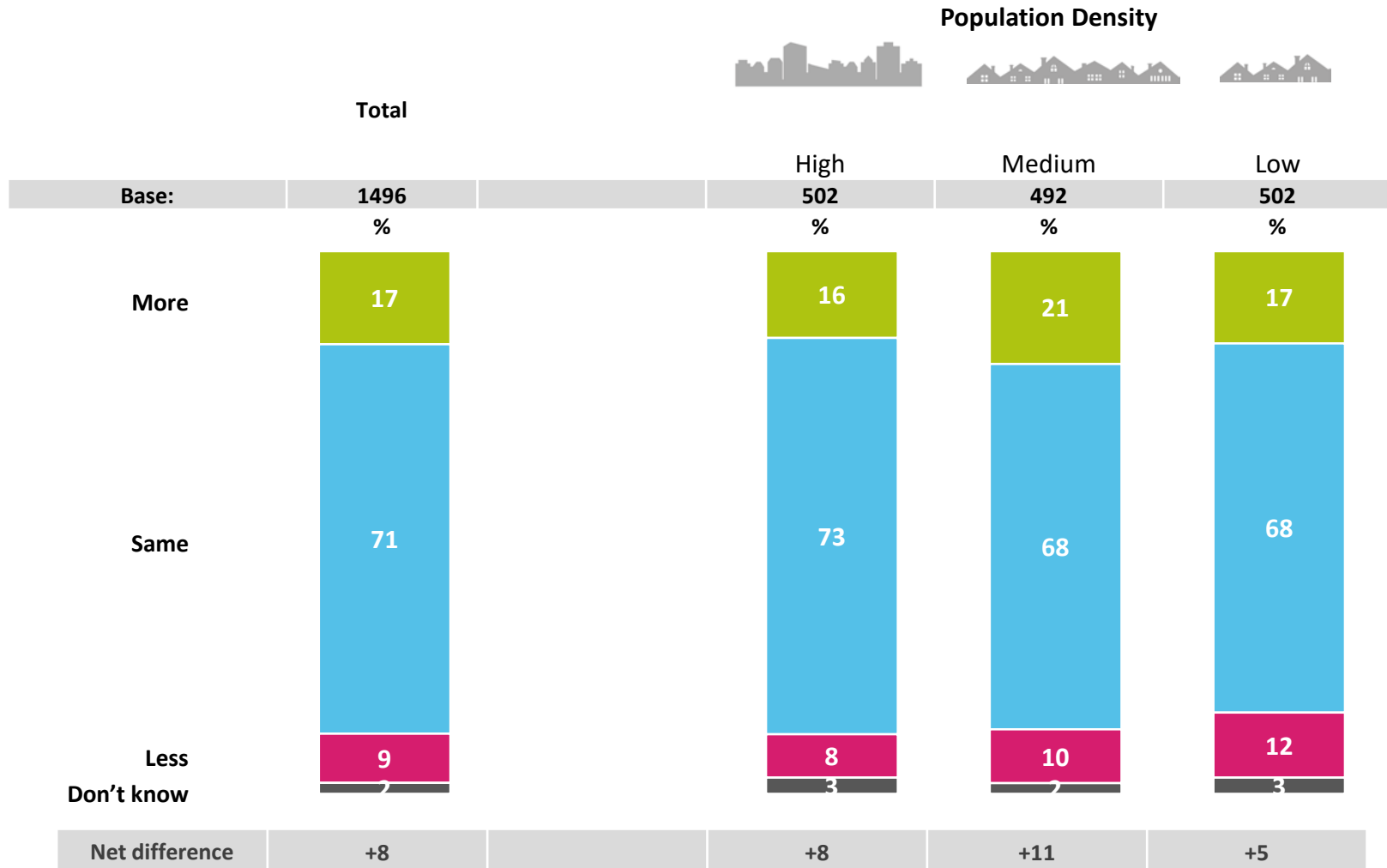
Most frequent online purchasers are also the most frequency receivers of packages/parcels.



Q1b - Thinking specifically about the personal post you receive, on average how frequently do you receive packet/parcel containing goods e.g. clothing, electronics, etc.?

Frequency of receiving parcels/packages versus previous year x Samples

Base: All adults aged 18+



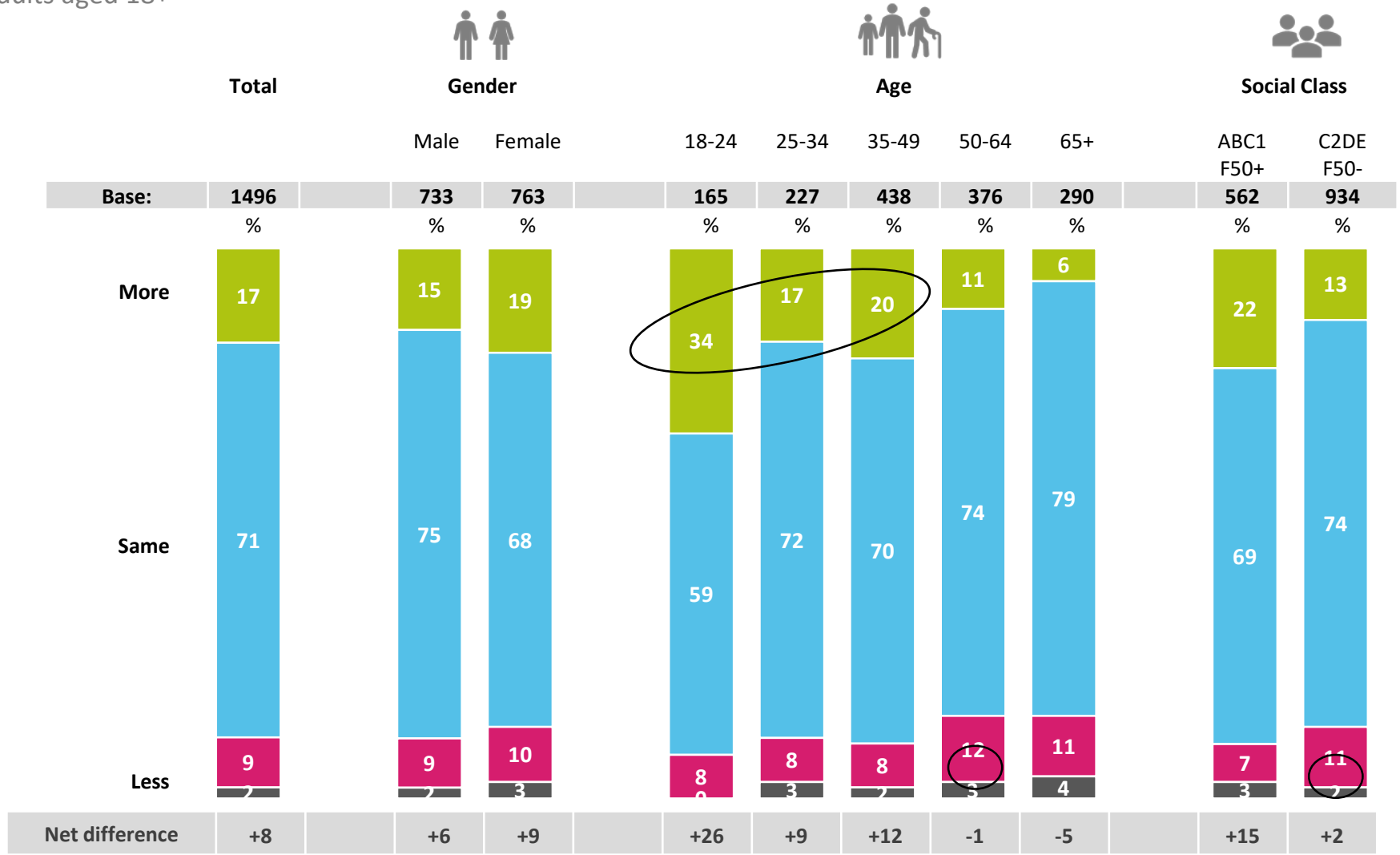
1 in 5 claim to be receiving more packages/parcels than they did last year, particularly those in Medium areas.

Q2c parcel - For a packet/parcel, please tell me if you are receiving more, less or about the same compared to this time last year?

Frequency of receiving parcels/packages versus previous year x demographics



Base: All adults aged 18+



The increase in consumers receiving more packages/parcels versus the previous year is being driven by the U50s (particularly U25s) and ABC1s.

Frequency of receiving packages/parcels vs previous year x online purchasing

Base: All adults aged 18+



Consumers who purchase products online are most likely to have experienced an increase in parcel/packages vs the previous year.





Sending Post: Packages/Parcels

Frequency of sending packages/parcels x sample

Base: All adults aged 18+

Population Density

 Sig higher vs total
 Sig lower vs total



Medium density area respondents claim to be the most frequent monthly senders of parcels/packages. A large one third never send packages/parcels, with half sending less than every 4 weeks.

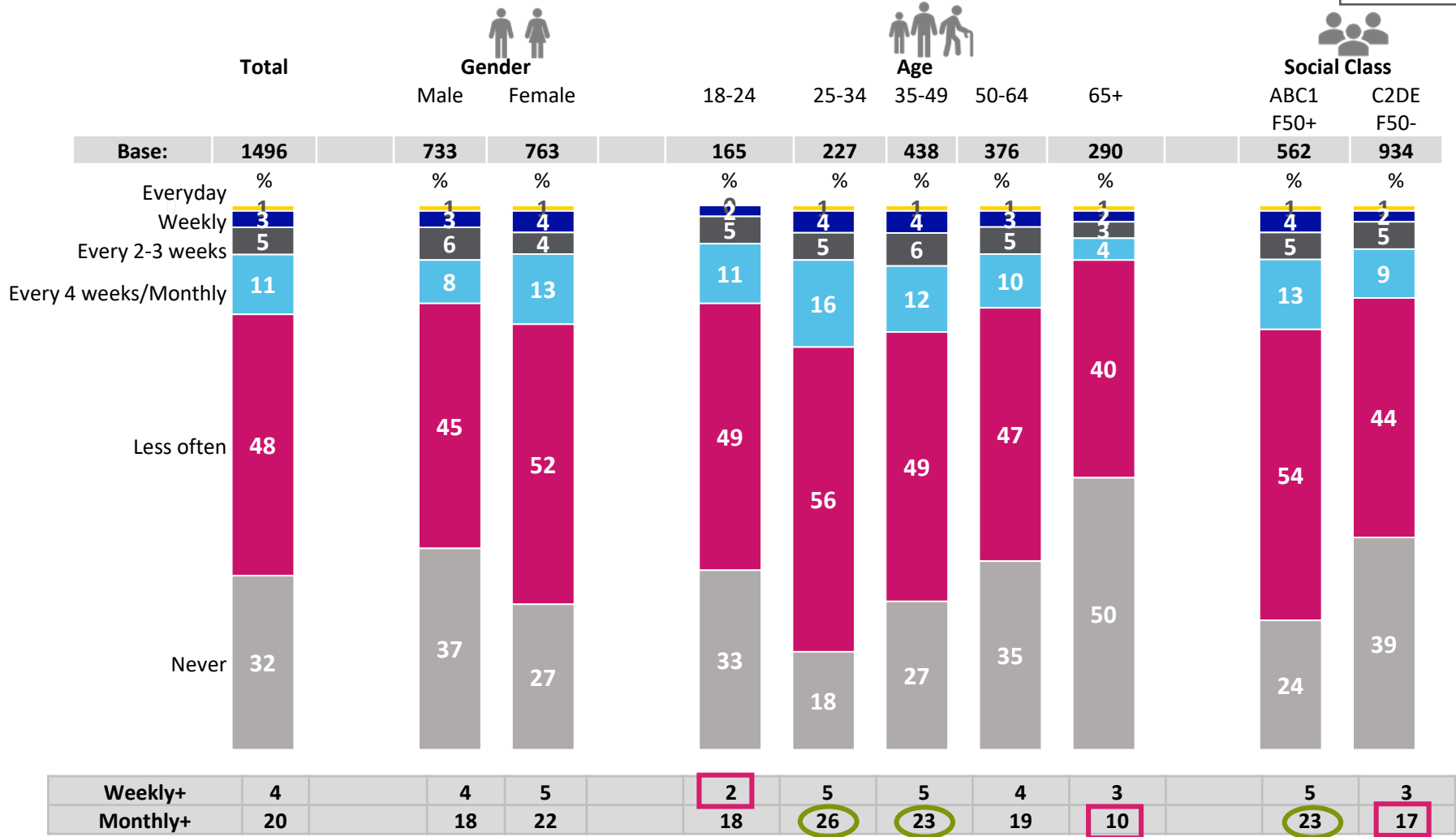


Q9b - On average how frequently do you send packet/parcel containing goods e.g. clothing, electronics, etc. either via An Post or any courier service?

Frequency of sending packages/parcels x demographics

Base: All adults aged 18+

Sig higher vs total
 Sig lower vs total



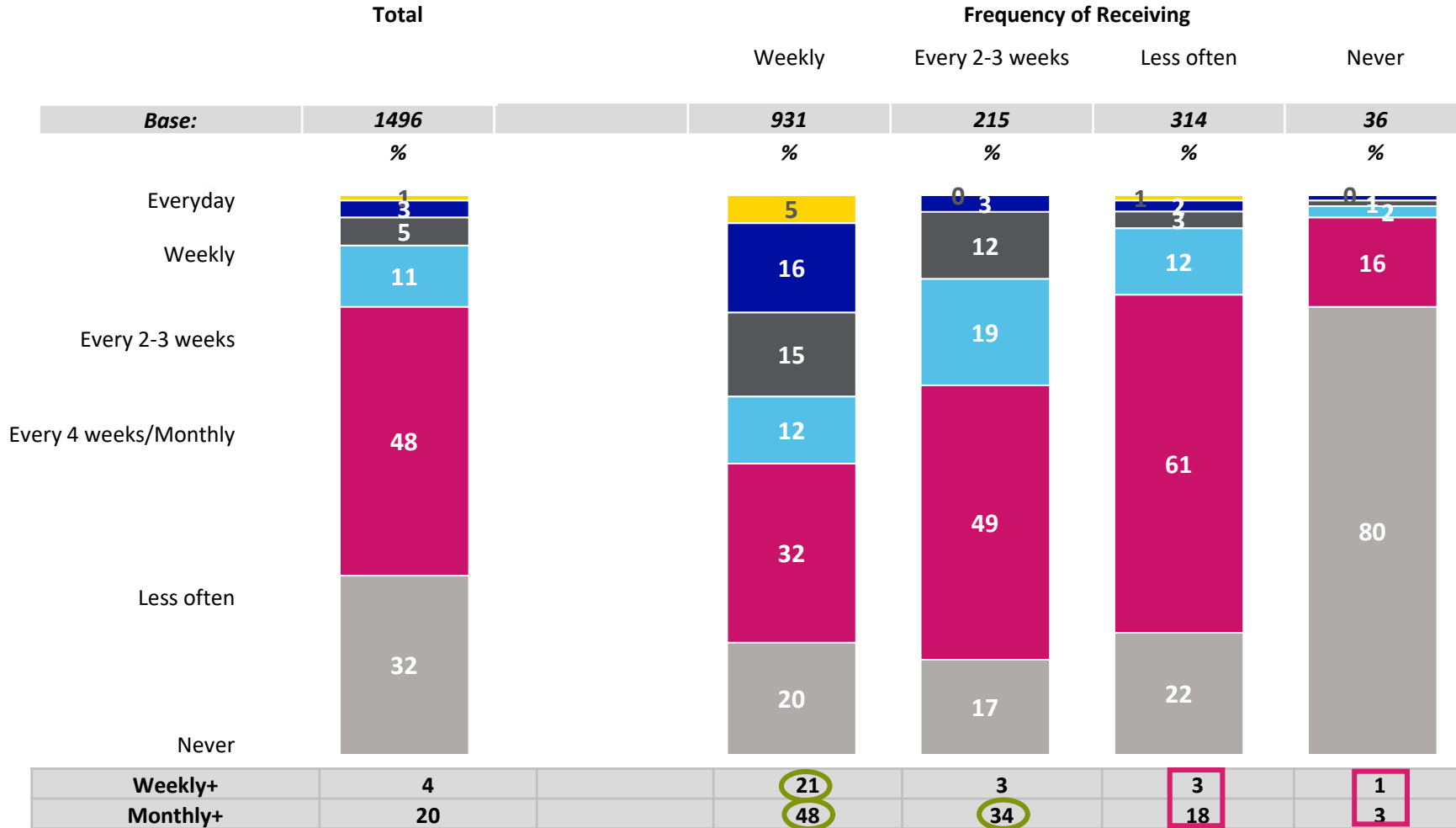
The 25-50 age group and ABC1s claim to be the main senders of packages/parcels on a monthly basis.

Q9b - On average how frequently do you send packet/parcel containing goods e.g. clothing, electronics, etc. either via An Post or any courier service?

Frequency of sending packaging/parcels x frequency of receiving packages/parcels

 Sig higher vs total
 Sig lower vs total



Base: All adults aged 18+



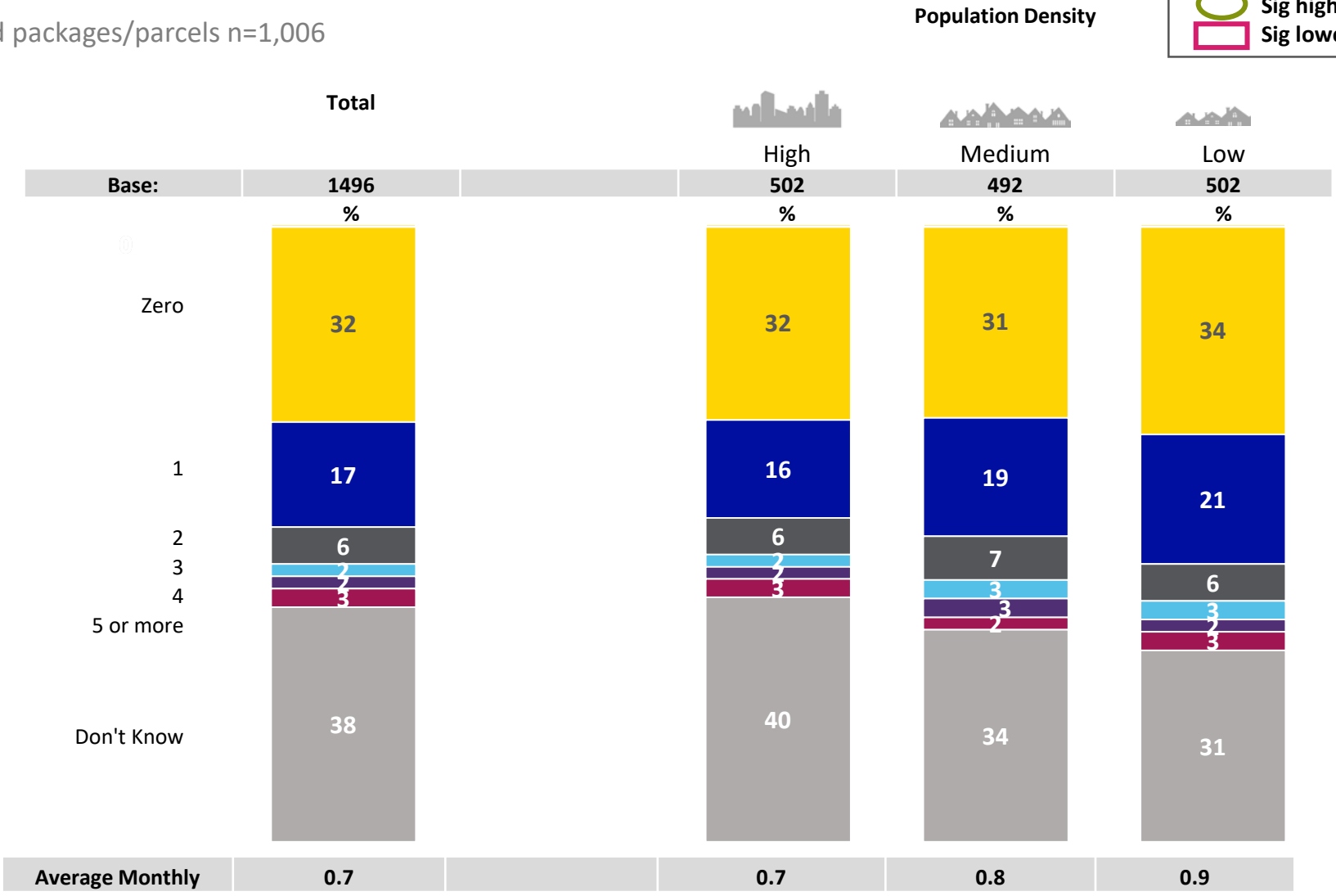
Those who receive parcels most frequently are also the most frequent senders of packages/parcels.

 Q9b - On average how frequently do you send packet/parcel containing goods e.g. clothing, electronics, etc. either via An Post or any courier service?



Average number of packaging/parcels sent per month x samples

 Sig higher vs total
 Sig lower vs total

Base: All who send packages/parcels n=1,006



The average number of parcels sent by consumers is 0.7 per month. However a high don't know exists. Little variation across the density areas.

 Q10aii_1_other - In your personal capacity; on average how many packets/parcels do you send during a typical week?
 Q10biiv_1_other - In your personal capacity; on average how many packets/parcels do you send during a typical month?

 Sig higher vs total
 Sig lower vs total



Social Class

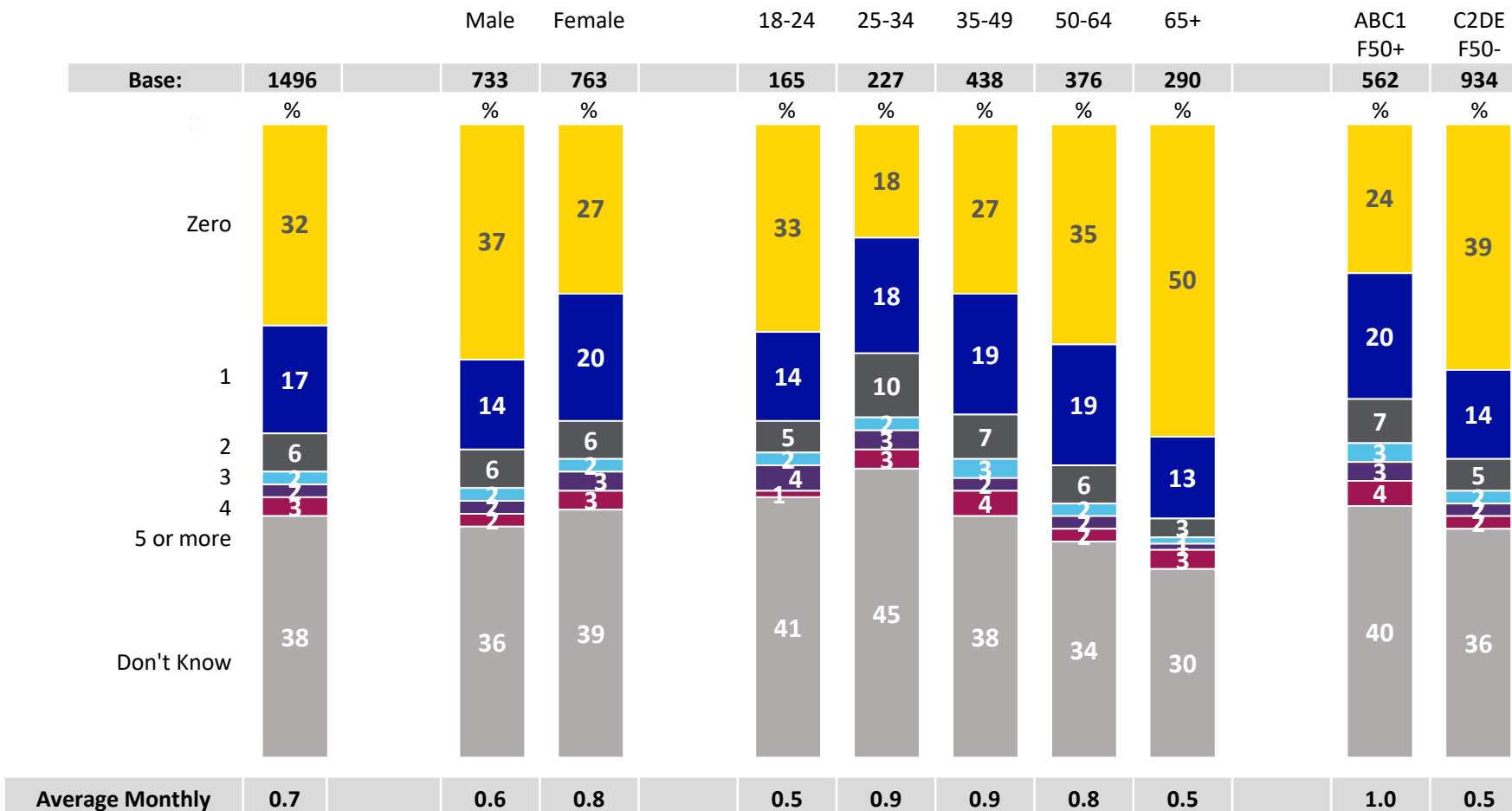


Age



Gender

Total



The average number of parcels sent per month is similar across demographics. However a high don't know exists.

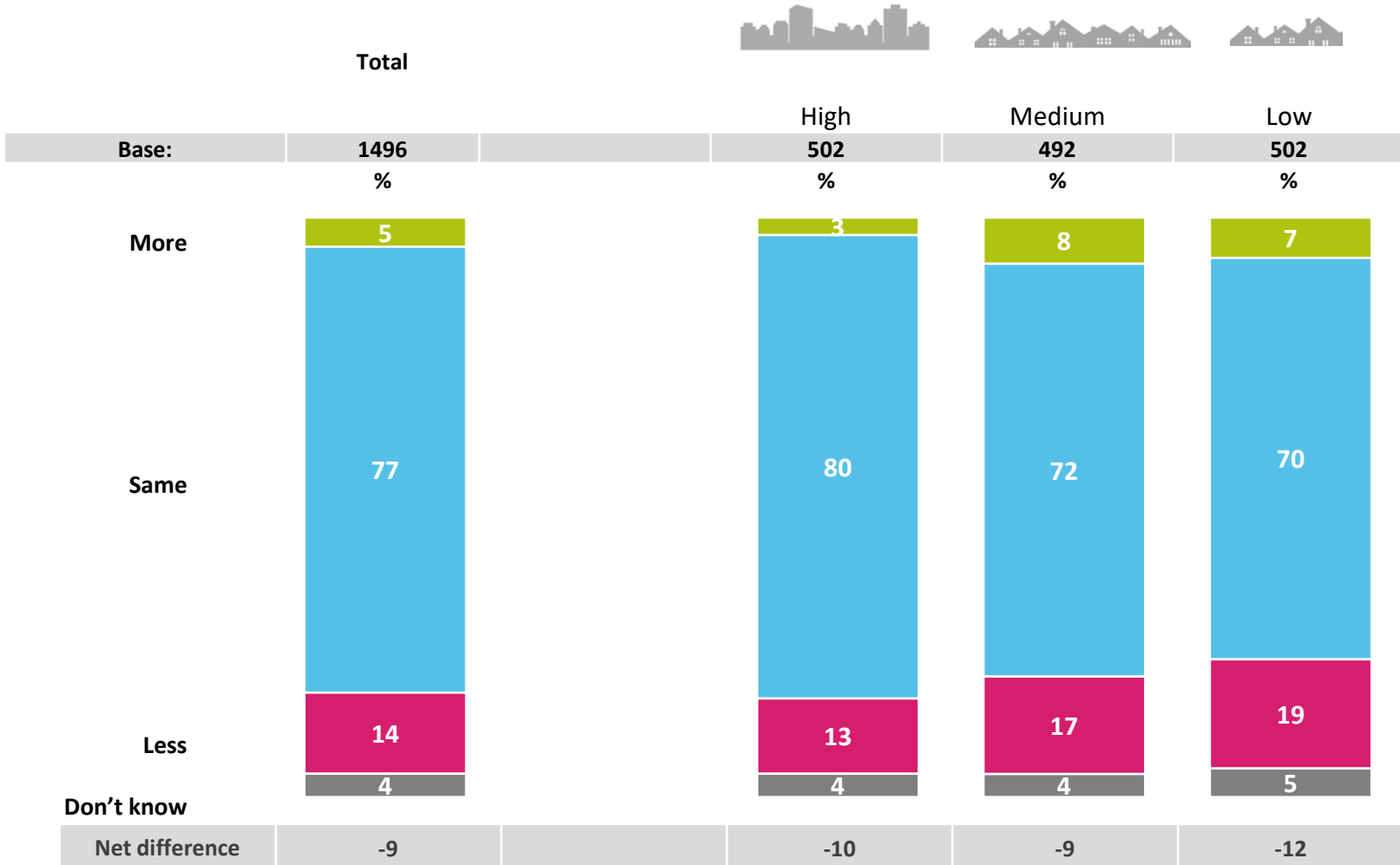


Q10aai_1_other - In your personal capacity; on average how many packets/parcels do you send during a typical week?
 Q10biiv_1_other - In your personal capacity; on average how many packets/parcels do you send during a typical month?

Frequency of sending parcels/packages versus previous year x samples

Base: All adults aged 18+

Population Density

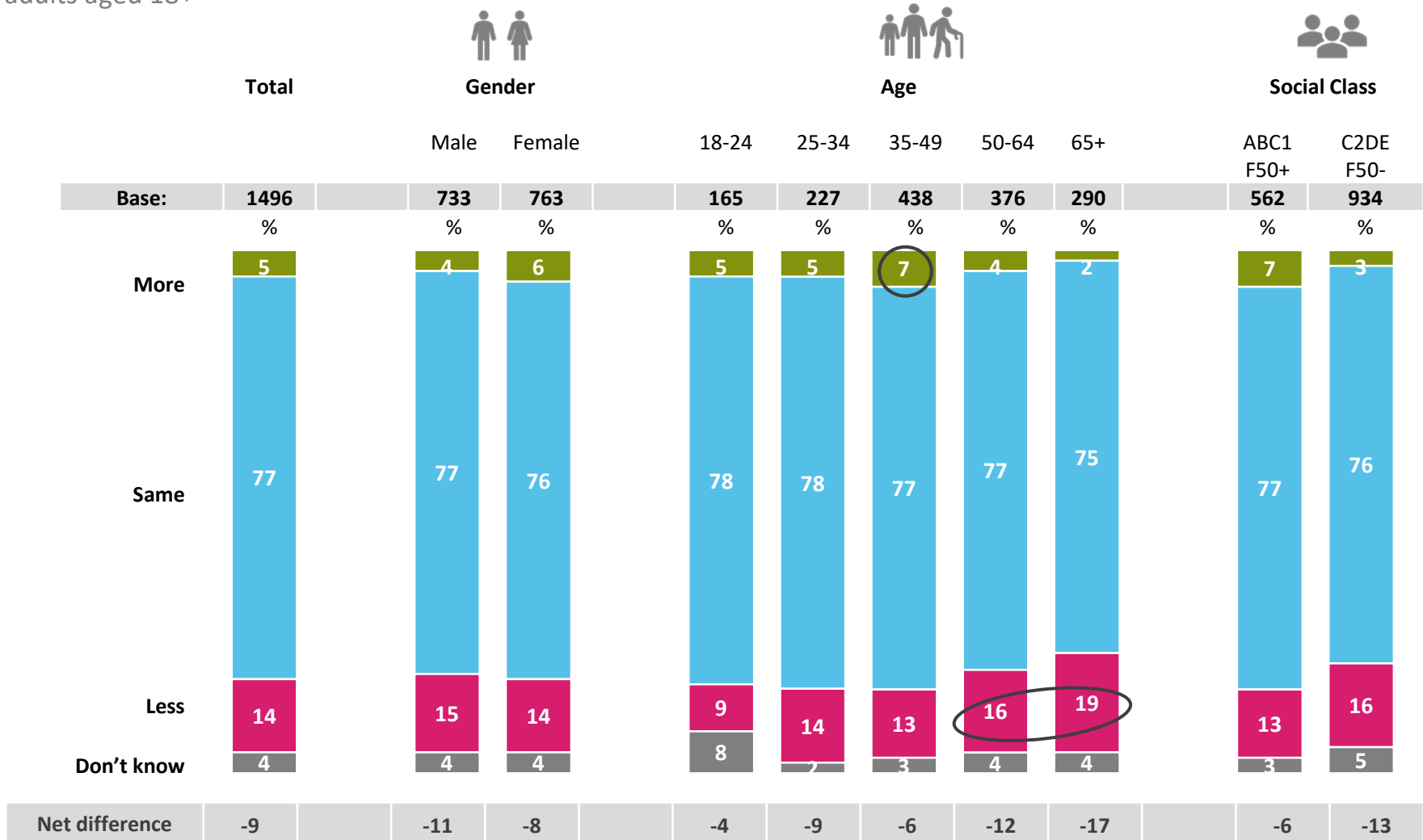


The increase in consumers receiving parcels has not transferred into an increase in sending parcels.

Frequency of sending parcels/packages versus previous year x demographics



Base: All adults aged 18+



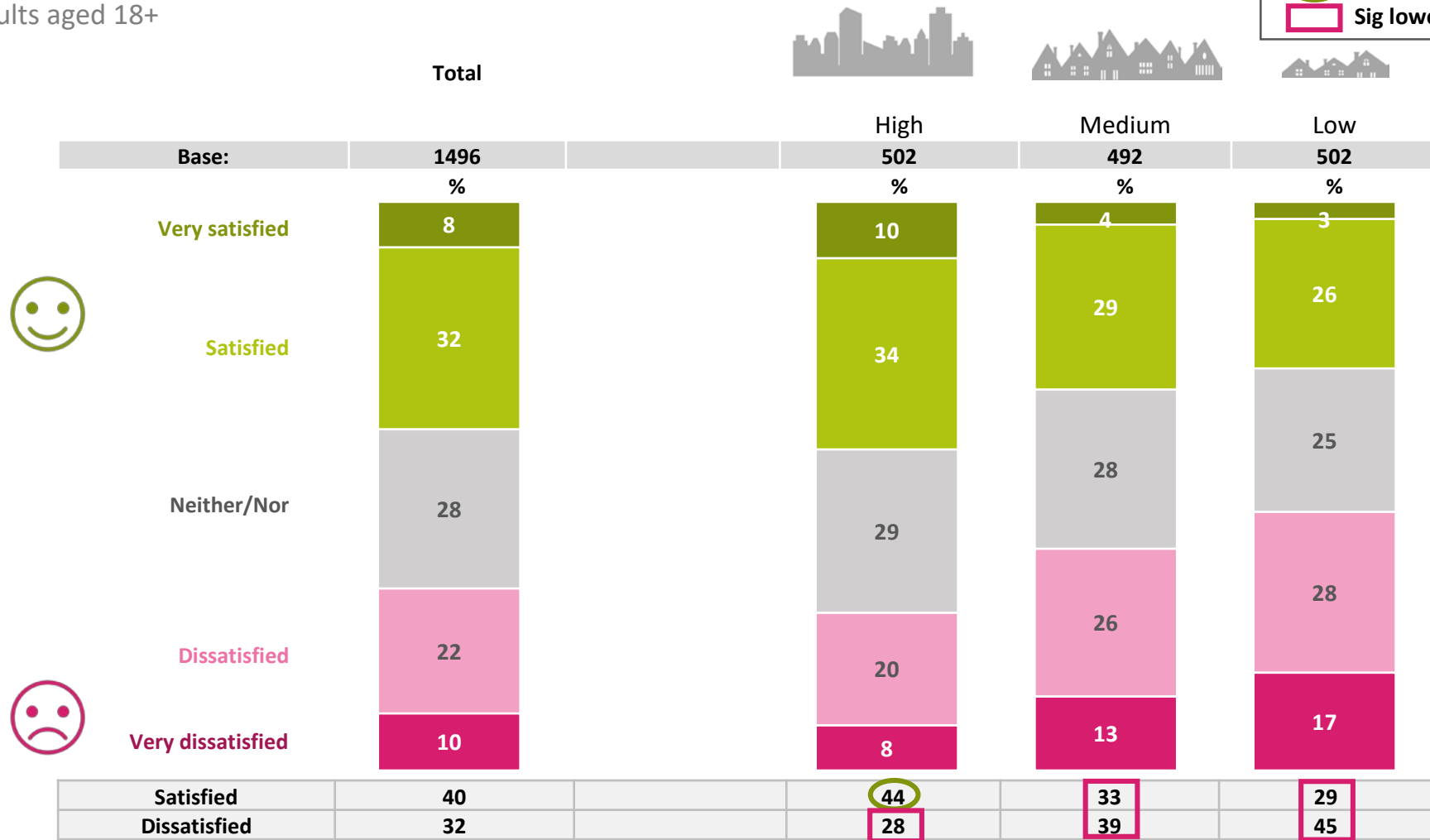
A higher proportion of the older age cohort claim to be sending less parcels/packages when compared to younger consumers.

Satisfaction with the cost of sending parcels/packages x samples

Population Density

 Sig higher vs total
 Sig lower vs total



Base: All adults aged 18+



2 in 5 claim to be satisfied with the cost of sending parcels, mainly those living in the most urban areas (the least frequent senders of parcels). One third are dissatisfied, higher compared to letter post.

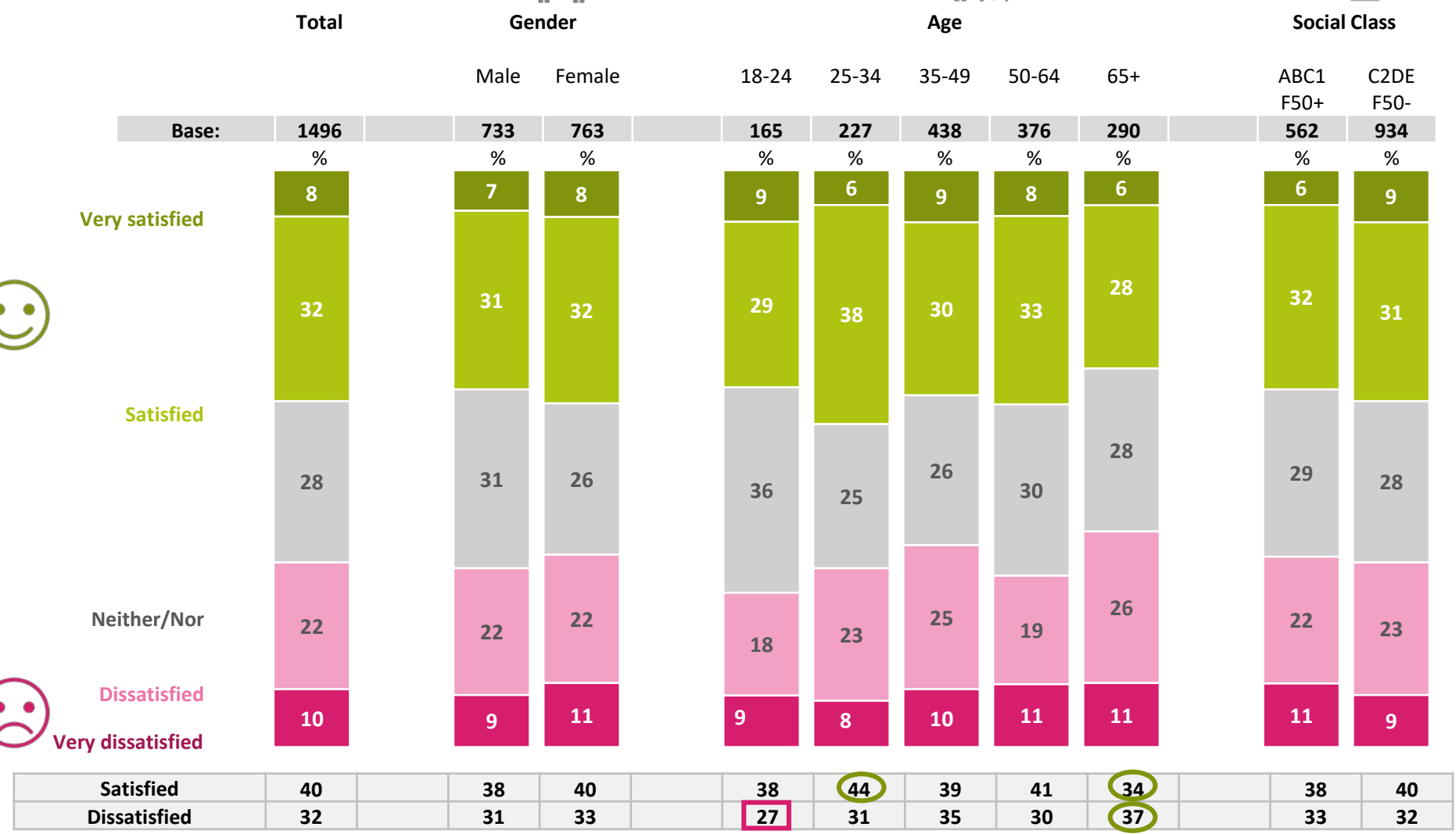
Q16 - And when sending Packet/ Parcel Post up to the size of a shoebox with An Post, how satisfied are you with the following? - Cost of sending parcel post

Satisfaction with the cost of sending parcels/packages x demographics

 Sig higher vs total
 Sig lower vs total



Base: All adults aged 18+



Little variation in satisfaction with the cost of sending parcels/packages across demographics.

Q16 - And when sending Packet/ Parcel Post up to the size of a shoebox with An Post, how satisfied are you with the following? - Cost of sending parcel post



Key Highlights

Key Insights Residential

Familiarity with mail service



60% assume it takes 2+ working days for standard national mail to be delivered.



Awareness of the €1 price point is strong however (78% based on pilot data).

Frequency of receiving post



(But on balance people feel it's declining)



(And on balance people believe this is increasing, especially 18-44 year olds who are frequent online purchasers)

(41% monthly+)

Frequency of sending post



By contrast only **17%** send letters weekly+ (urban areas lower)- on balance consumers register a decline here too.



Technology such as **email** and **digital** in general are clearly impacting letters.



Only **4%** send **parcels/packages weekly+** (**20% monthly+**) unlike receiving, the frequency of sending is believed to be declining (on balance)

Frequency of Online Purchasing



One third of the population are purchasing items online weekly or more often that require delivery – significantly higher amongst those aged **18-49** years, and **middle class**.

Mail cost satisfaction



2 in 3 are satisfied with the cost of sending letters. Those who send more are less satisfied. However, the incidence of sending letters is low.



2 in 5 are satisfied with the cost of sending packages/parcels (lower than letters) – lower compared to letters. The incidence of sending parcels is also low.

Thank you.



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Delve Deeper