



Postal Services Survey

ComReg Document No. 23/91a – 26 September 2023

B&A

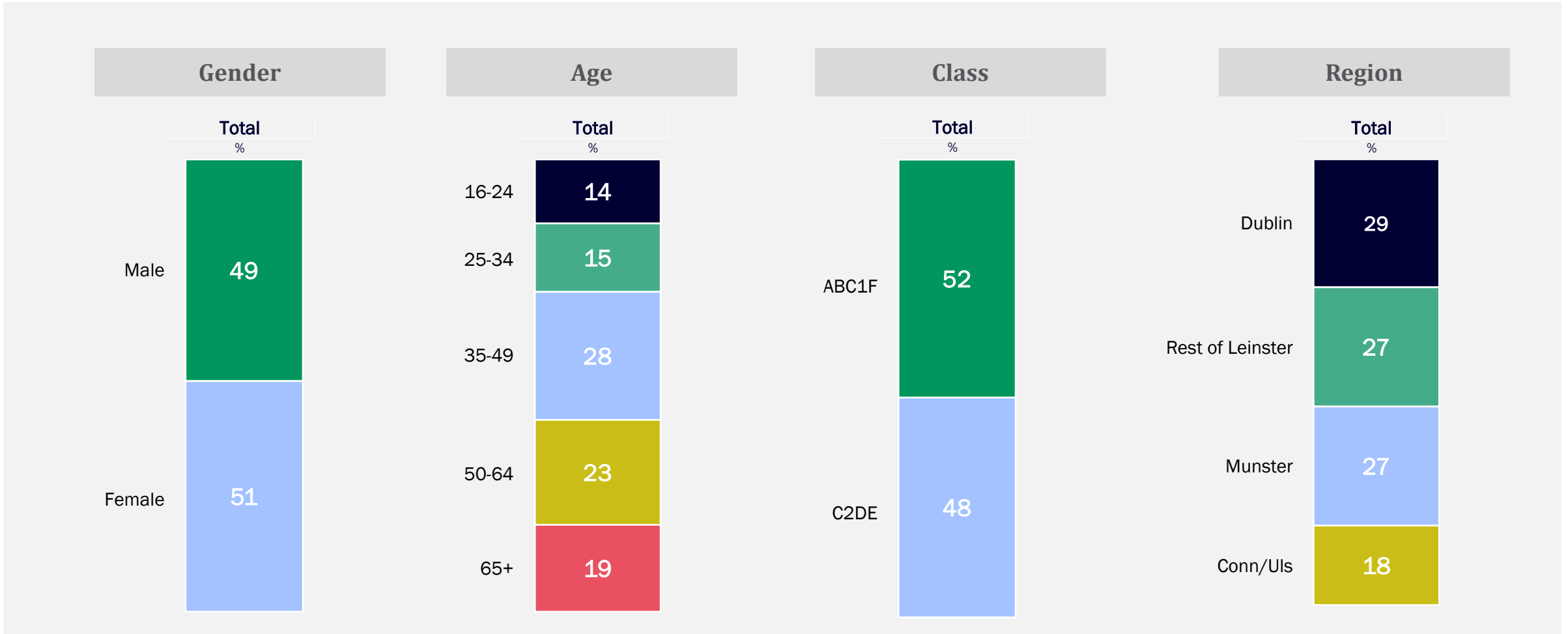
Methodology

- The agreed questionnaire was included on one wave of the Behaviour & Attitudes face-to-face barometer survey. This survey is administered face-to-face to a sample of 1014 respondents 16+ years of age.
- The sample is quota controlled by gender, age, social class, region to match the known demographics of the population (CSO estimates).
- Fieldwork on the project was undertaken between 9th – 20th August 2023.
- A similar survey was conducted in May 2021 and published by ComReg as Document No. 21/100a on 11 October 2021. Where applicable, comparisons are made.



Profile of Respondents

Base: All respondents aged 16+ - 1,014



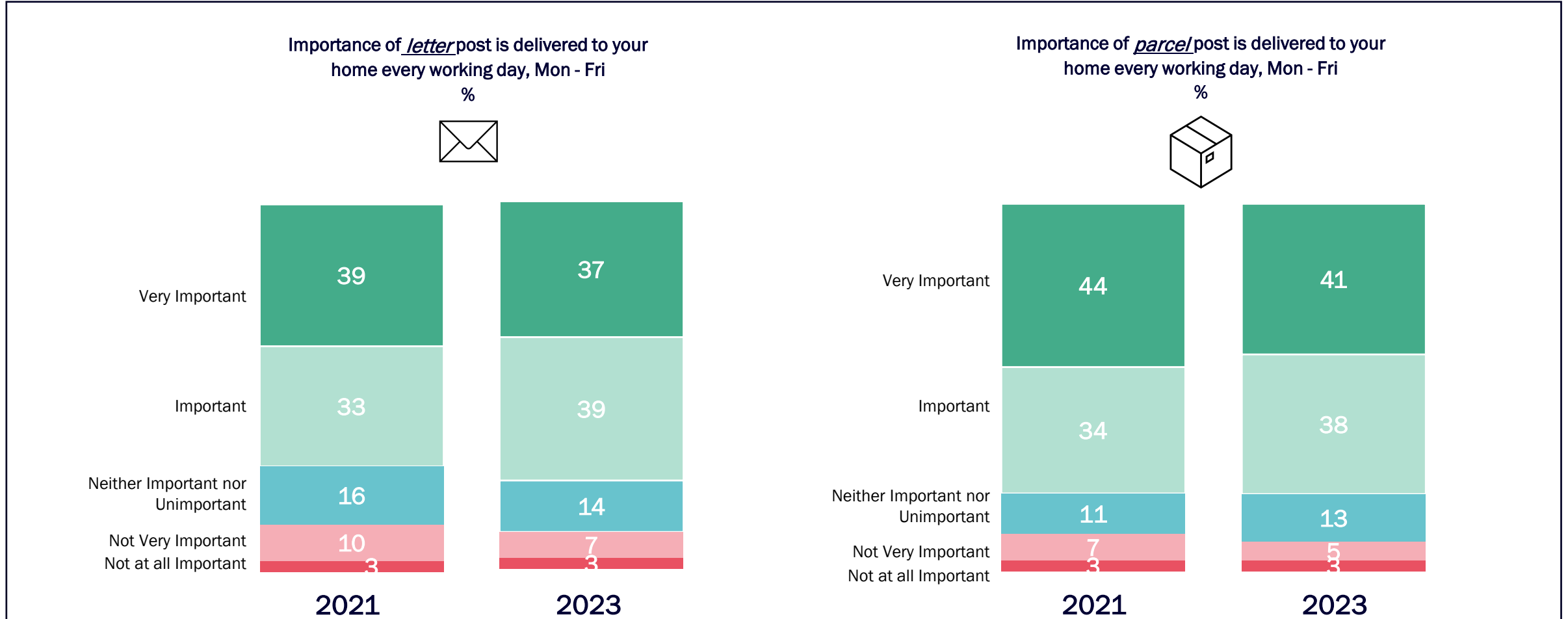


Postal Attitudes

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Daily delivery of letter and parcel post remains important

Base: All respondents aged 16+ - 1,014

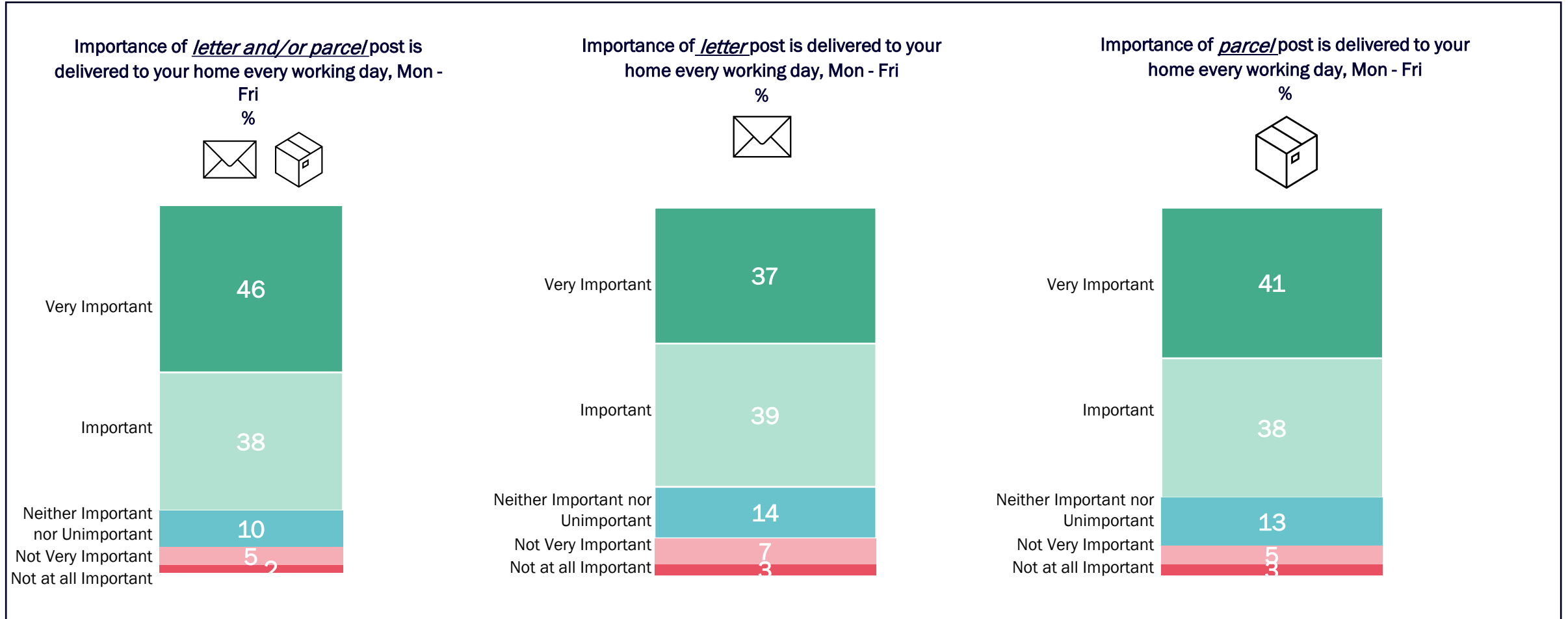


Very important for just under half of the population. Though it should be noted that over 3 in 4 view both letter and parcel post being delivered to home every working day as important.

Daily delivery of letter and parcel post remains important

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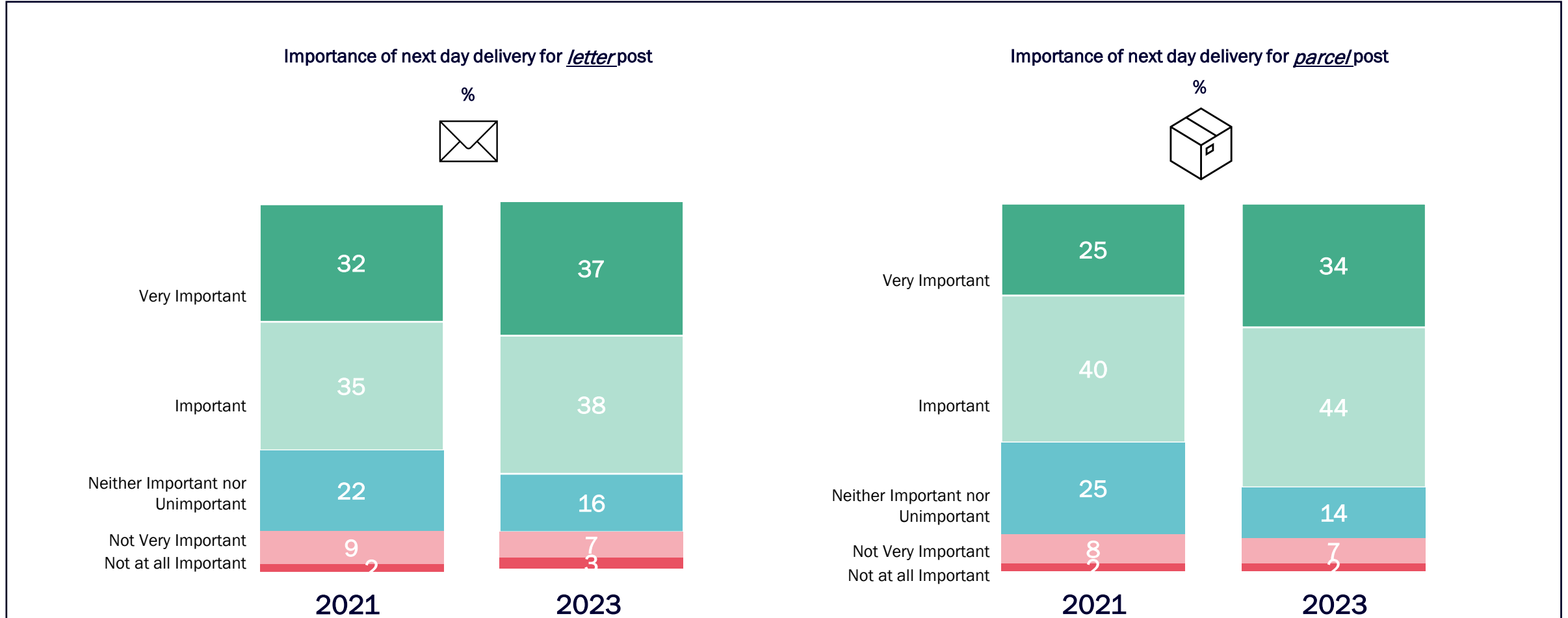
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Very important for just under half of the population. 2 in 5 only view it as important (ie not very).

Importance of next day delivery for letters and parcels

Base: All respondents aged 16+ - 1,014



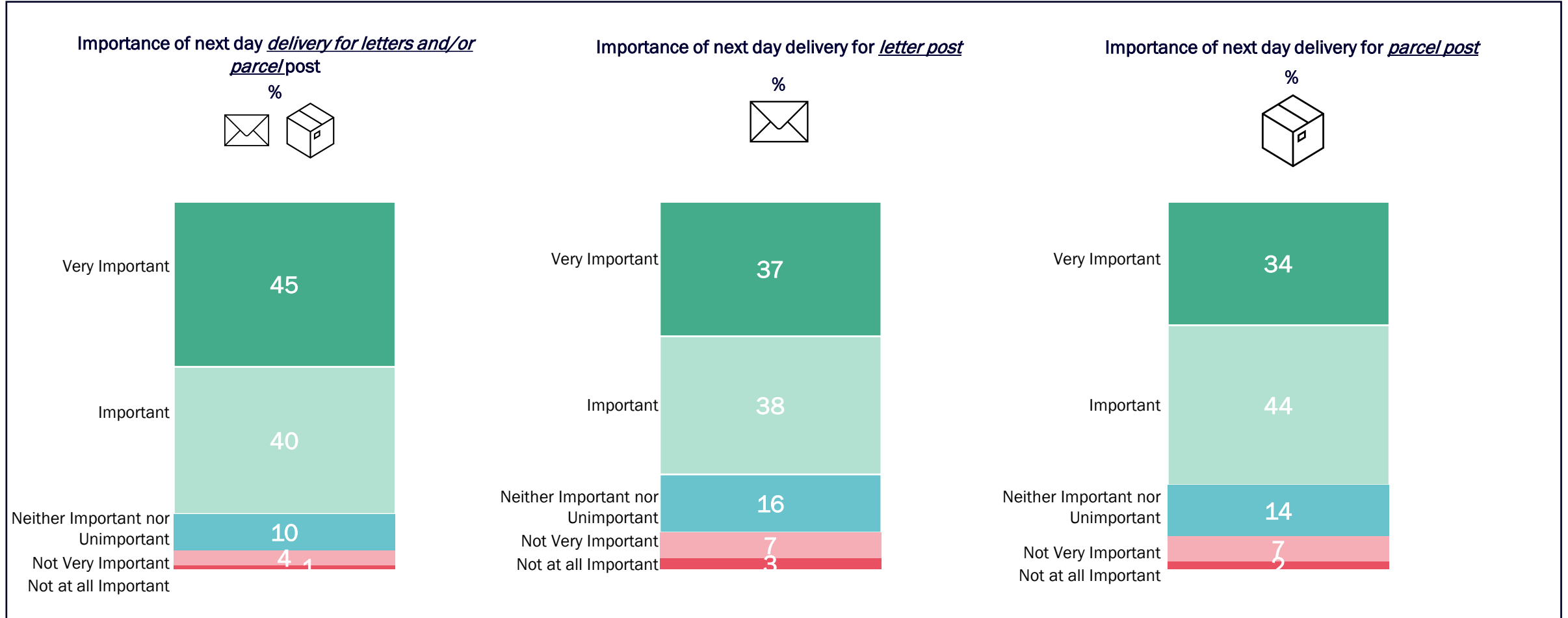
We see similar trends in regard to next day delivery as with delivery each working day, with next day delivery being very important for about one third of the population. Three in four and four in five rate next delivery for letters and parcels respectively as important at all. Since the last survey, there is an increase in importance for both letters and parcels, though the parcel delivery increase is more notable - a third claiming next day delivery of parcel post is very important, up from one quarter in 2021.



Importance of next day delivery for letters and parcels

Base: All respondents aged 16+ - 1,014

2023



We see similar trends in regard to next day delivery as with delivery each working day, with next day delivery being very important for just under half of the population. 2 in 5 note it is important, but not overly so.

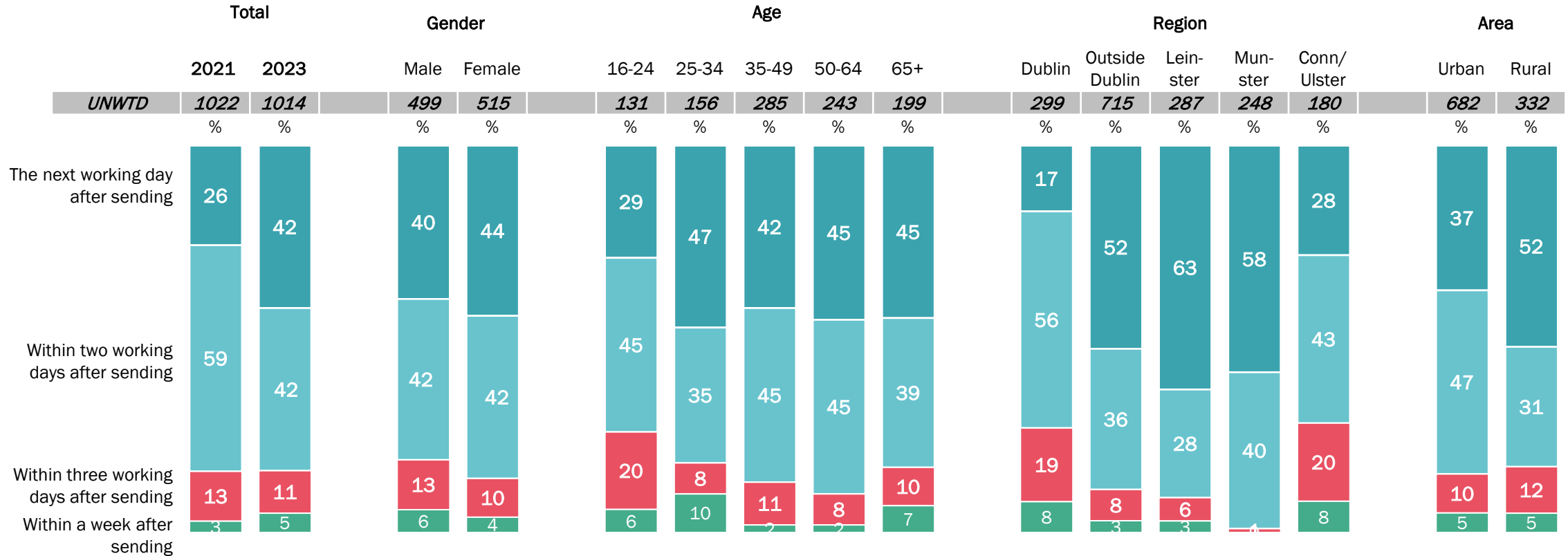
Since the last survey, there is an increase from a quarter to a third claiming next day delivery of parcel post is very important.



Speed of delivery of letter post x demographics

Base: All respondents aged 16+ - 1,014

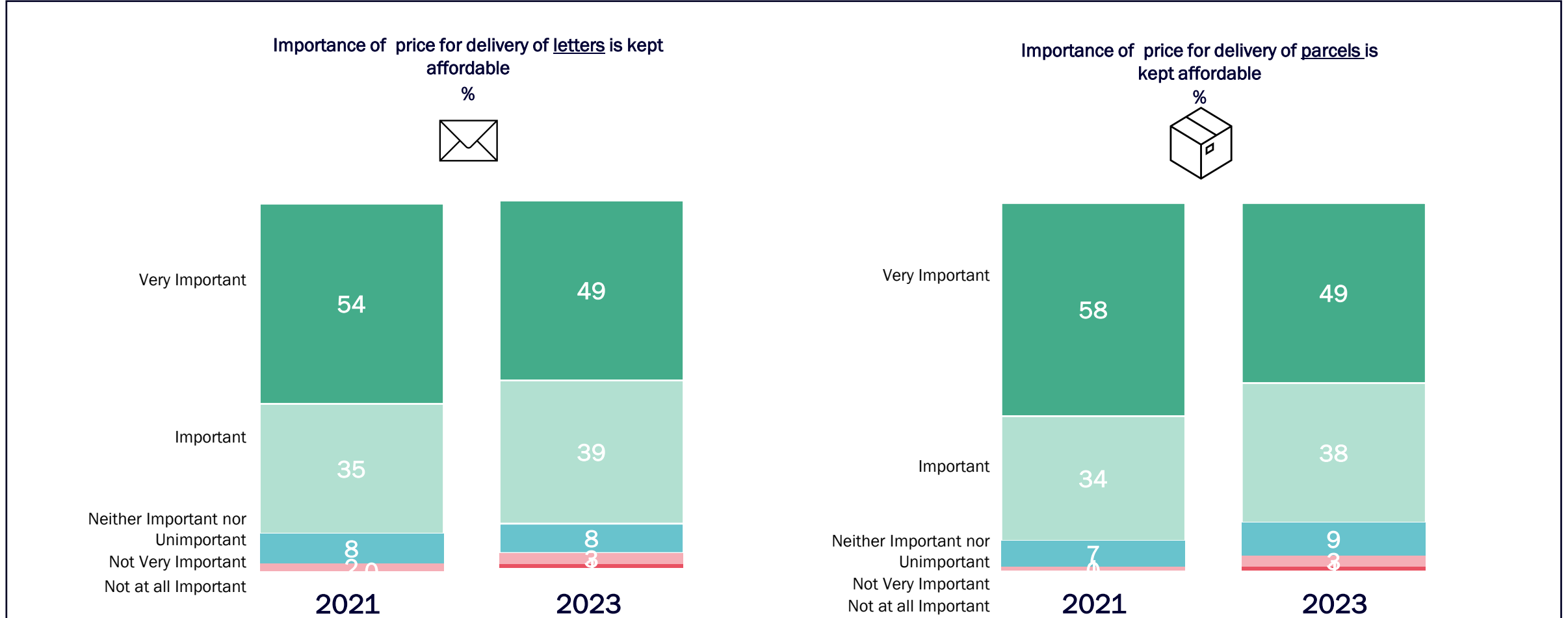
2023



2 in 5 value next day delivery, however just as many note that 2 day delivery is suitable. 11% would accept three working day delivery. Similar demographic trends stand out here, with those in Dublin, and under 25s attribute lesser importance on fast delivery. Since last survey, there has been an increase in the value of next day delivery.

Importance that price of postage is kept affordable

Base: All respondents aged 16+ - 1,014

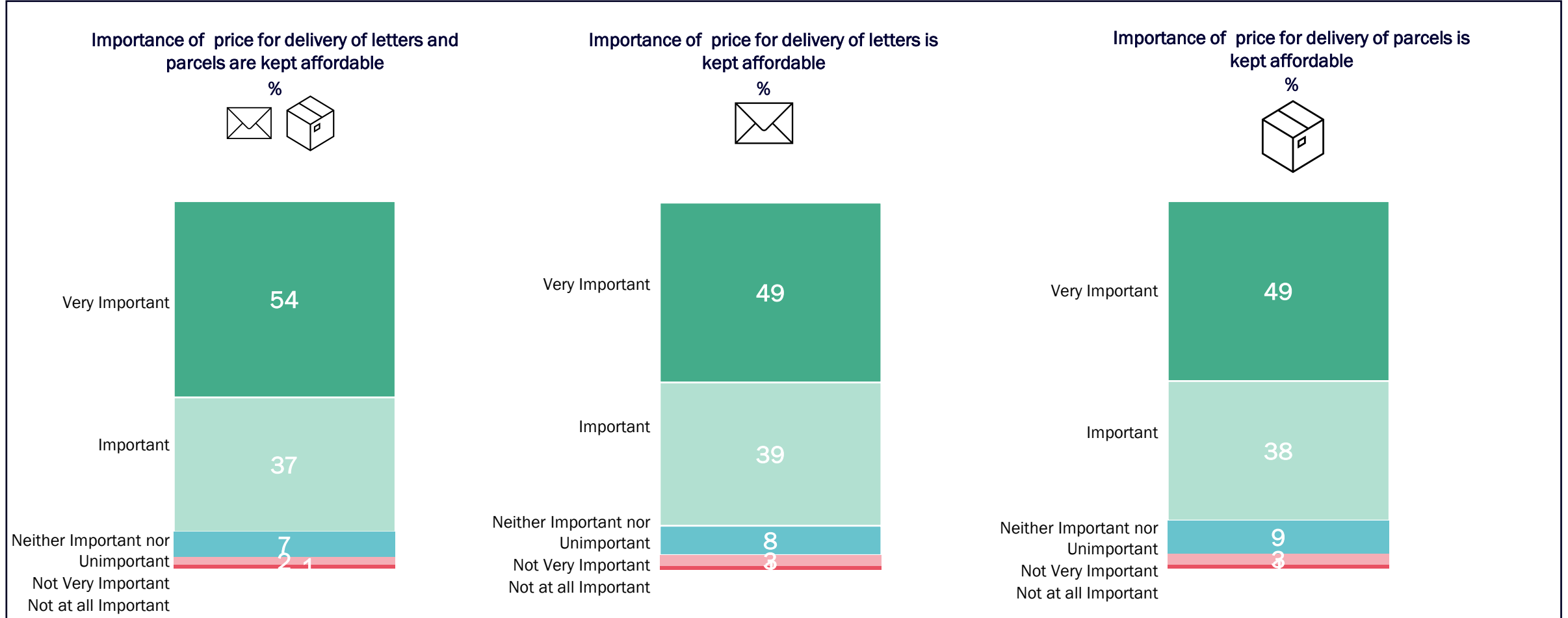


9 in 10 feel that the price of letters and parcels needs to be kept affordable, same as last survey. Roughly half note that it is very important to keep postal send costs affordable, with almost identical breakdowns of importance whether this be letter- or parcel-focused.

Importance that price of postage is kept affordable

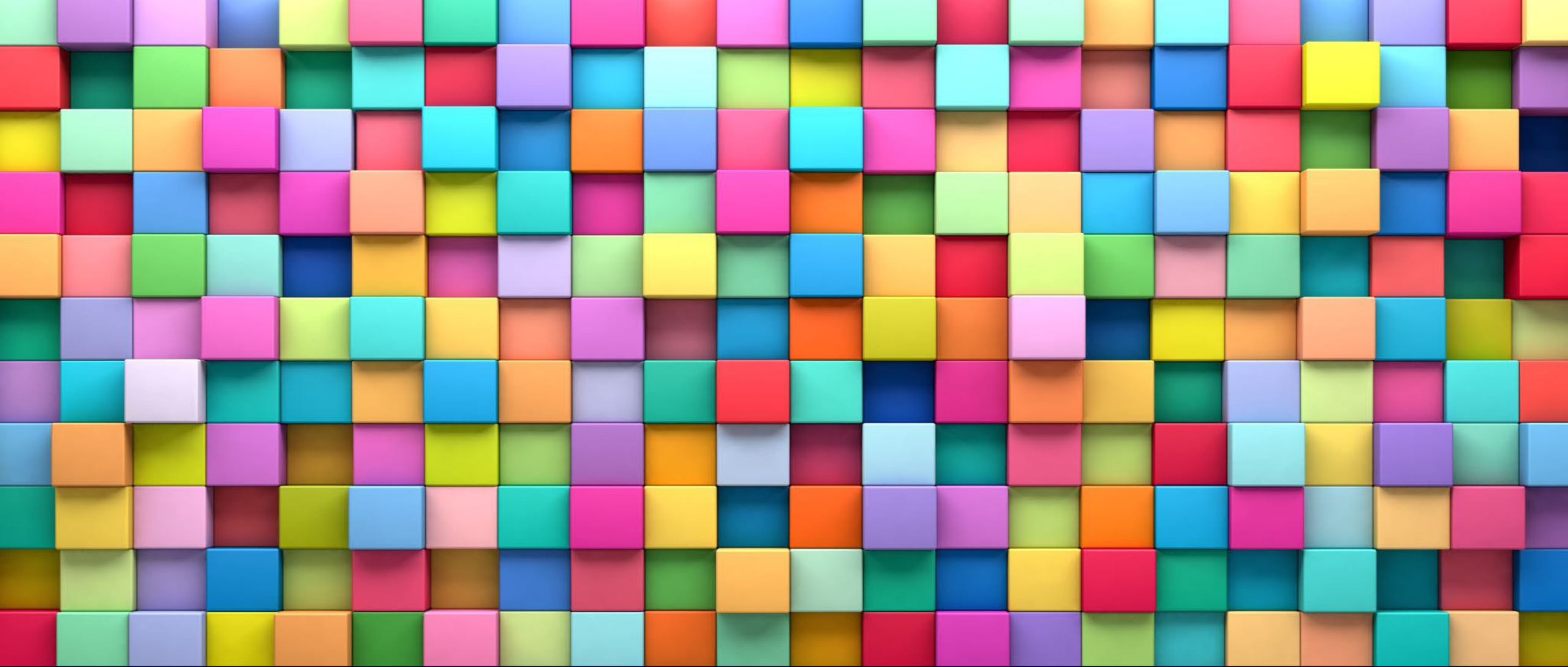
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Key Insights

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Postal Attitudes



- Importance of frequent postal delivery remains relatively unchanged from 2021, with 3 in 4 claiming daily delivery of letters is important to them, while 4 in 5 note daily delivery of parcels is important. It should be noted that for 2 in 5 of these claim it to be important rather than very important which would indicate this is not a key priority / need for them.



- 3 in 4 claim next day delivery of letters is important to them, while 4 in 5 claim next day delivery of parcels is important to them. Since the last survey, there is an increase in importance for both letters and parcels, though parcel delivery is more notable – in 2021 a quarter claimed next day delivery of parcel post was very important, this has risen to one third of the population.



- 2 in 5 value next day delivery of letters as their reasonable need, however just as many note that 2 day delivery is suitable. With that said, preference for next day delivery has increased for letters since 2021 (+16%pts).



- 9 in 10 feel the price of letters and parcels needs to be kept affordable, which is on par with 2021 results.