

Postal Services Survey Residential

Presentation Format

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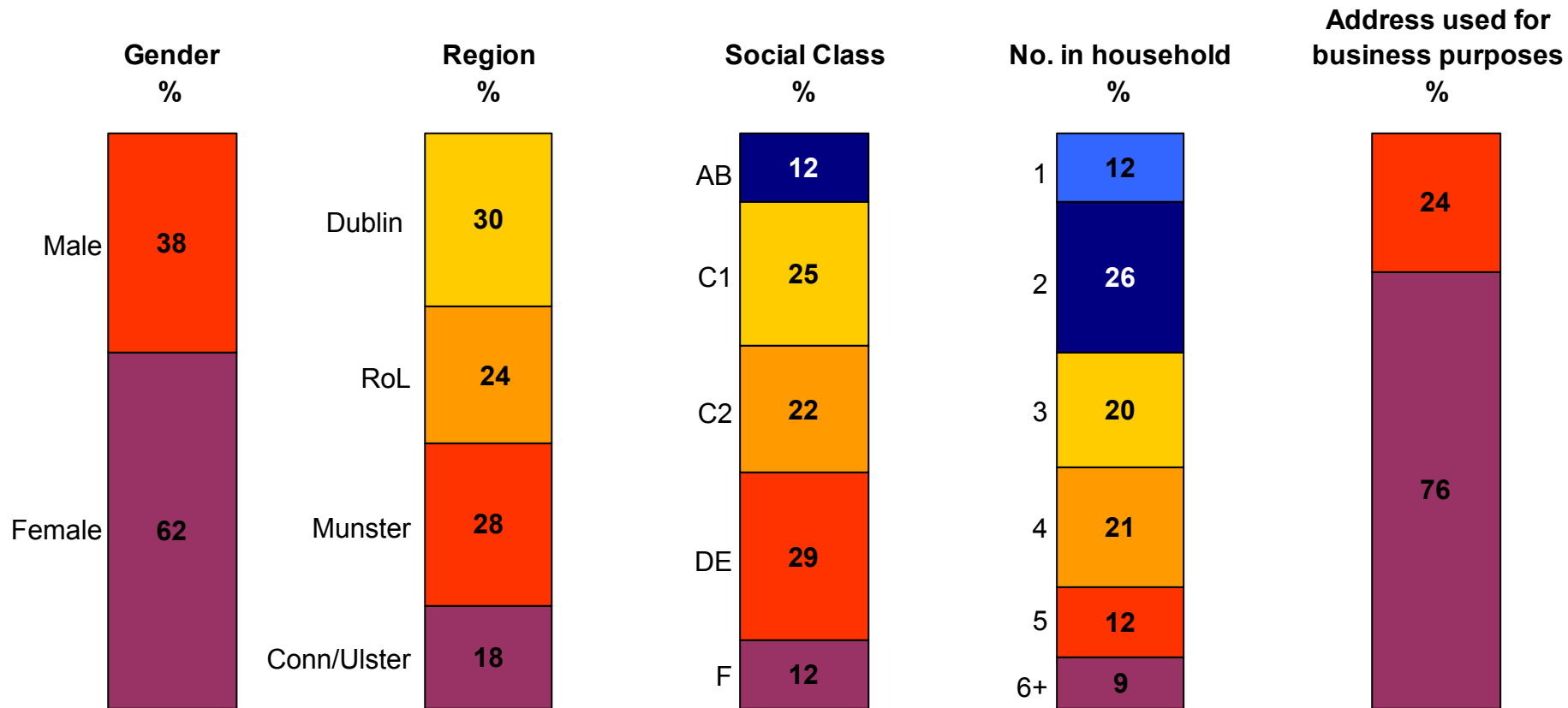
Introduction

Research Methodology

- Telephone survey conducted by TNS mrbi via CATI (Computer Aided Telephone Interviewing).
- 742 interviews were conducted amongst households in the Republic of Ireland.
- Quotas were set on region and social class.
- All interviews were conducted with the person with the most knowledge about incoming and outgoing post in the household.
- Fieldwork was conducted between 31st July – 11th August 2003.

Sample Profile

Base: All Respondents: 742

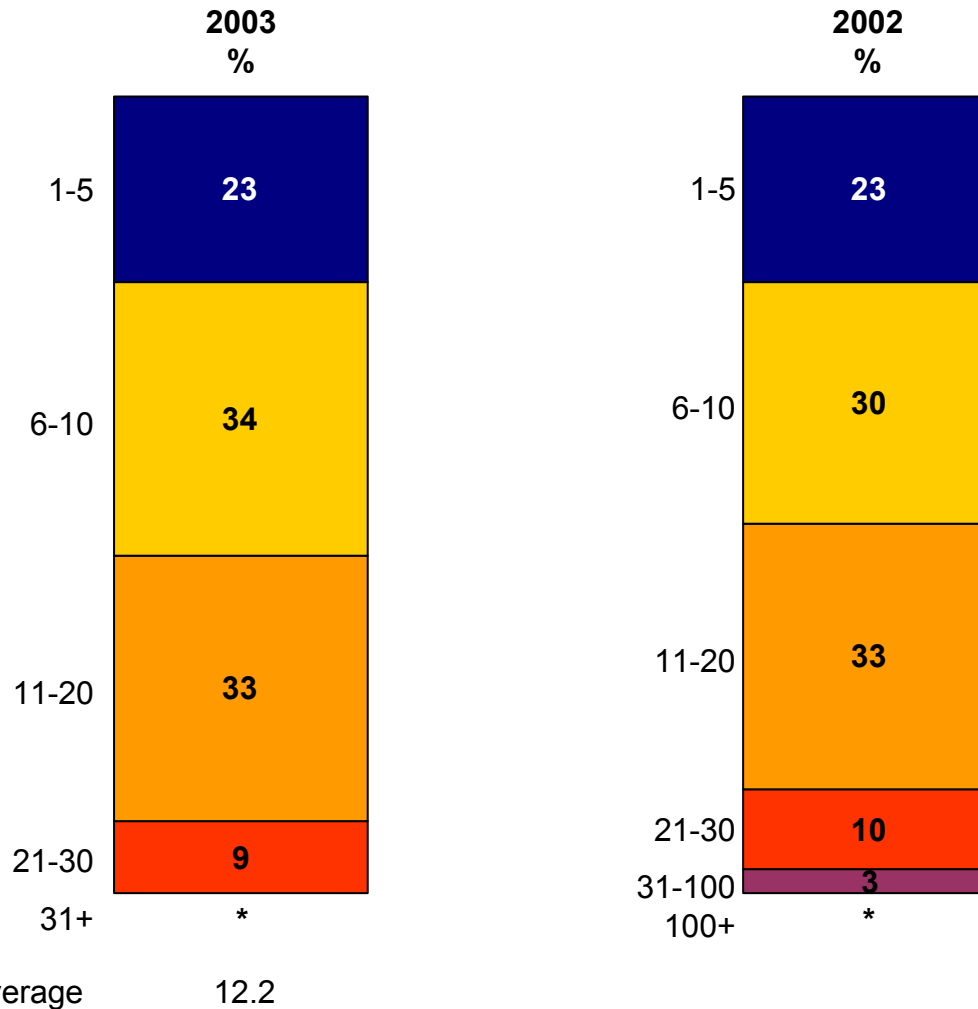


Findings

Receipt Of Letters

Items Of Mail Delivered To Home Address Weekly

Base: All Respondents: 742



* Less than 0.5%

Items Of Mail Delivered To Home Address Weekly x Household Type

Base: All Respondents: 742

MEAN SCORE SUMMARY

Respondent Sex

Male	13.4
Female	11.5

Social Class

AB	15.7
C1	13.1
C2	12.1
DE	9.6
F	13.1

Region

Dublin	12.3
Rest of Leinster	14.2
Munster	10.7
Conn/Ulster	11.4

Age

Up to 25*	15.8
25-34	11.6
35-44	11.8
45-54	13.1
55-64	14.0
65+	9.2

No. in Household

One	7.3
Two	11.2
Three	11.4
Four	13.9
Five+	15.1

Weekly volume sent

None	8.8
1-10	10.6
11-20	16.6
21+	31.4

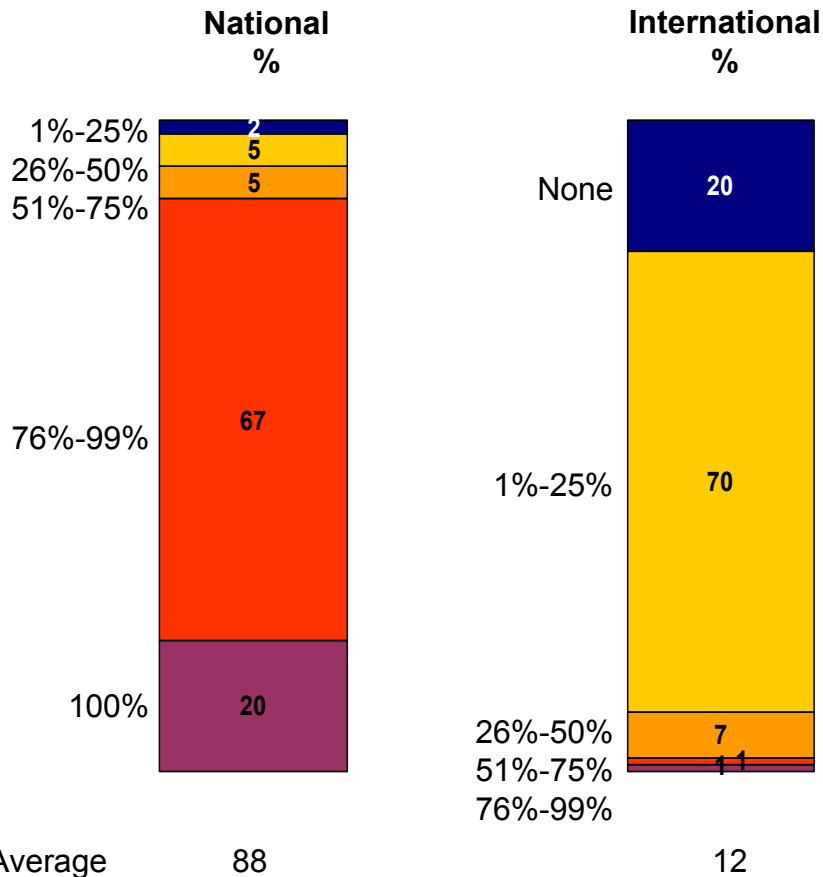
Business from home

Yes	17.8
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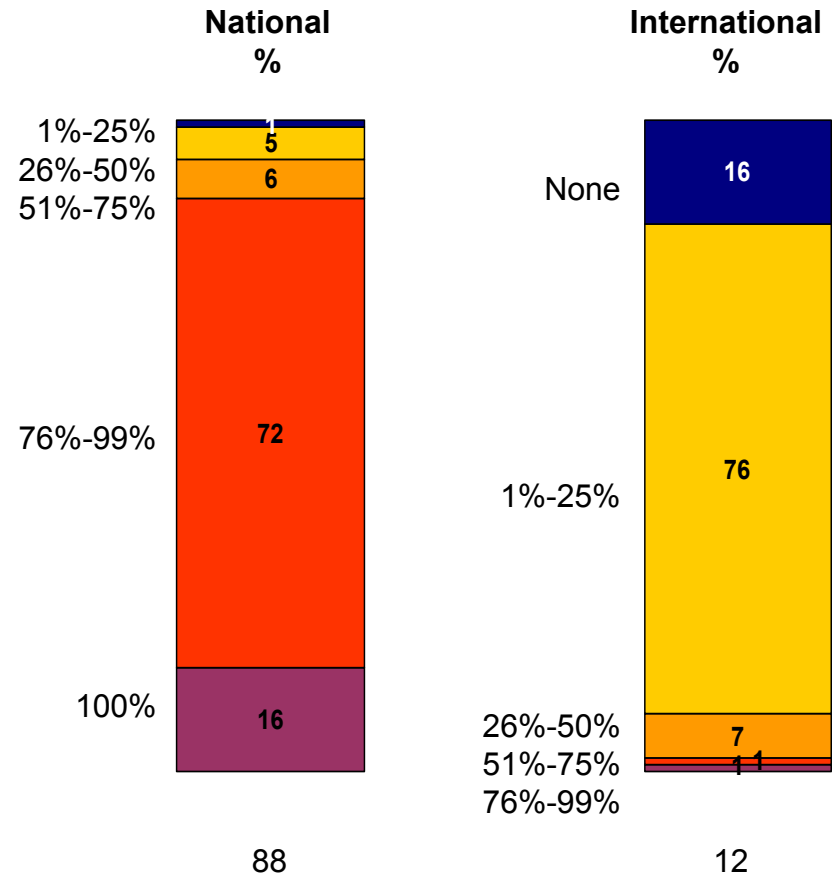
Proportion Of Mail Received From National Vs. International Destinations

Base: All Respondents: 742

Respondent Based

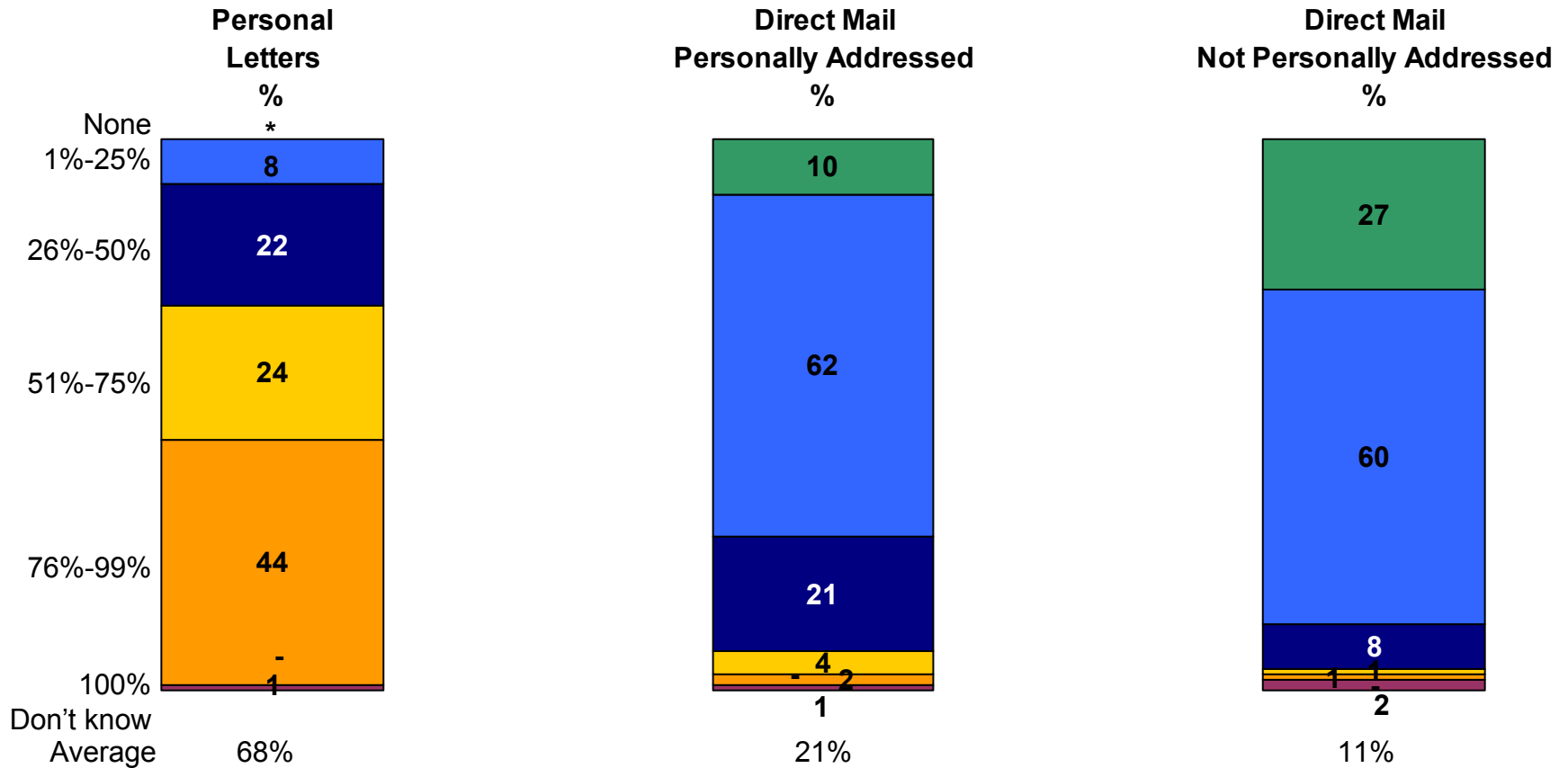


Volume Weighted



Type Of Mail Items Delivered

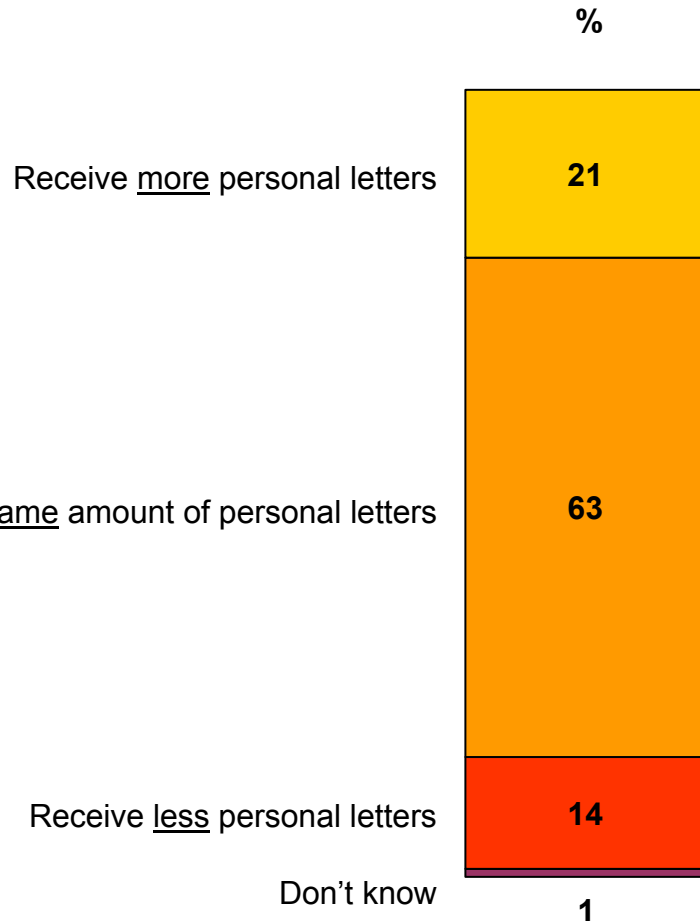
Base: All Respondents: 742



* Less than 0.5%

Volume Of 'Personal' Letters Received Compared With One Year Ago

Base: All Respondents: 742



KEY REASONS WHY MORE RECEIVED:

Base: 154

	%
More business/work related	21
Have more contacts	16
Family/friends moved away/abroad	13
More service bills (phone, ESB etc)	12
More bank/financial correspondence	12
More marketing/mail shots	7
Involved in more things (clubs etc)	7

KEY REASONS WHY LESS RECEIVED:

Base: 106

	%
Telephone	48
Email	31
Fewer contacts/people passed away	14
Internet	9
Not writing as many letters	5
Fewer people in the house	4

Volume Of Direct Mail Received Compared With One Year Ago

Base: All Respondents: 742



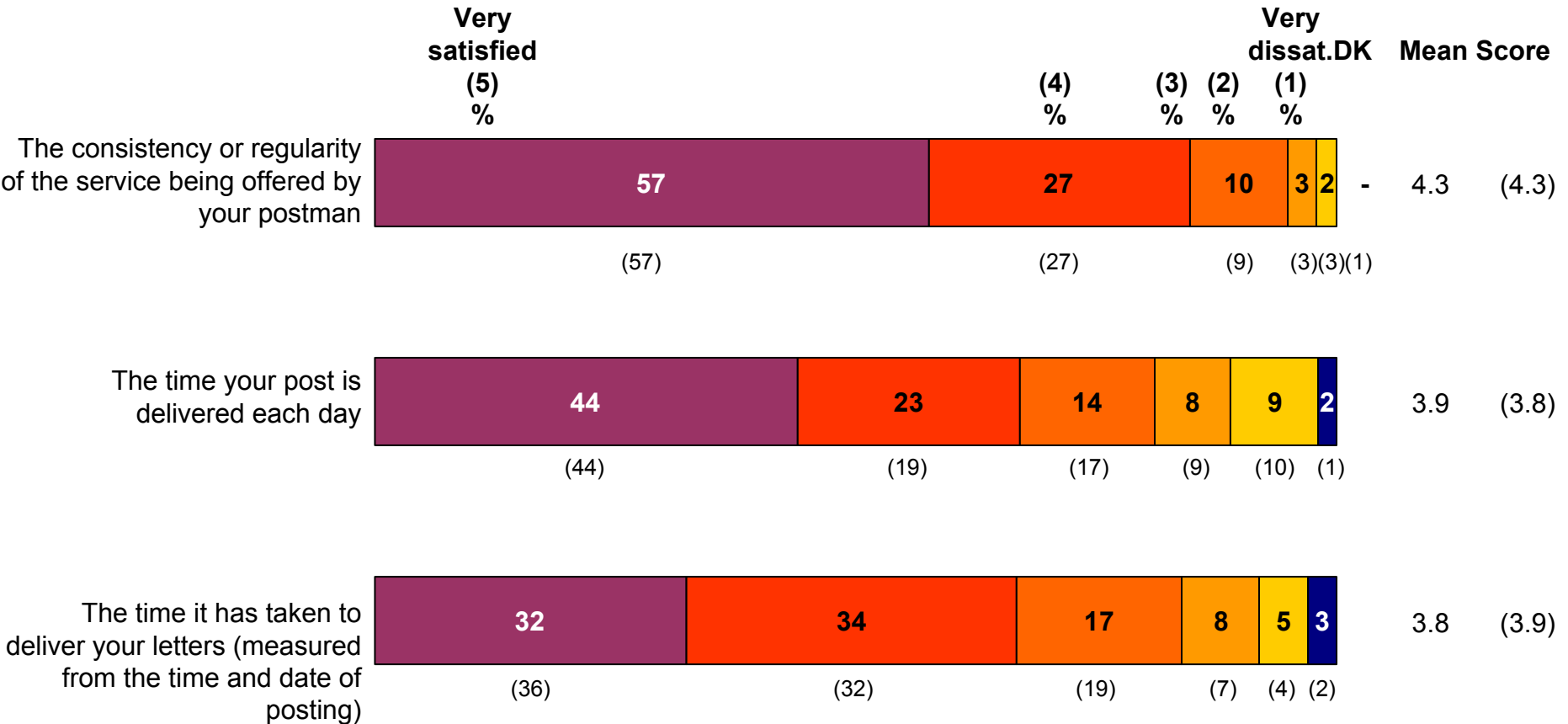
Action Taken With Direct Mail

Base: All Respondents: 742

	Total (742) %	WEEKLY VOLUME RECEIVED			DIRECT MAIL VS. ONE YEAR AGO		
		1-10 (420) %	11-20 (246) %	21+ (73) %	More (309) %	Less (64) %	Same (359) %
Always read it	27 (34)	30	23	22	25	31	28
Sometimes read it	34 (43)	33	37	28	35	37	33
Throw it away unopened	39 (22)	37	39	50	39	33	39
Don't know	- (1)	-	-	-	-	-	-

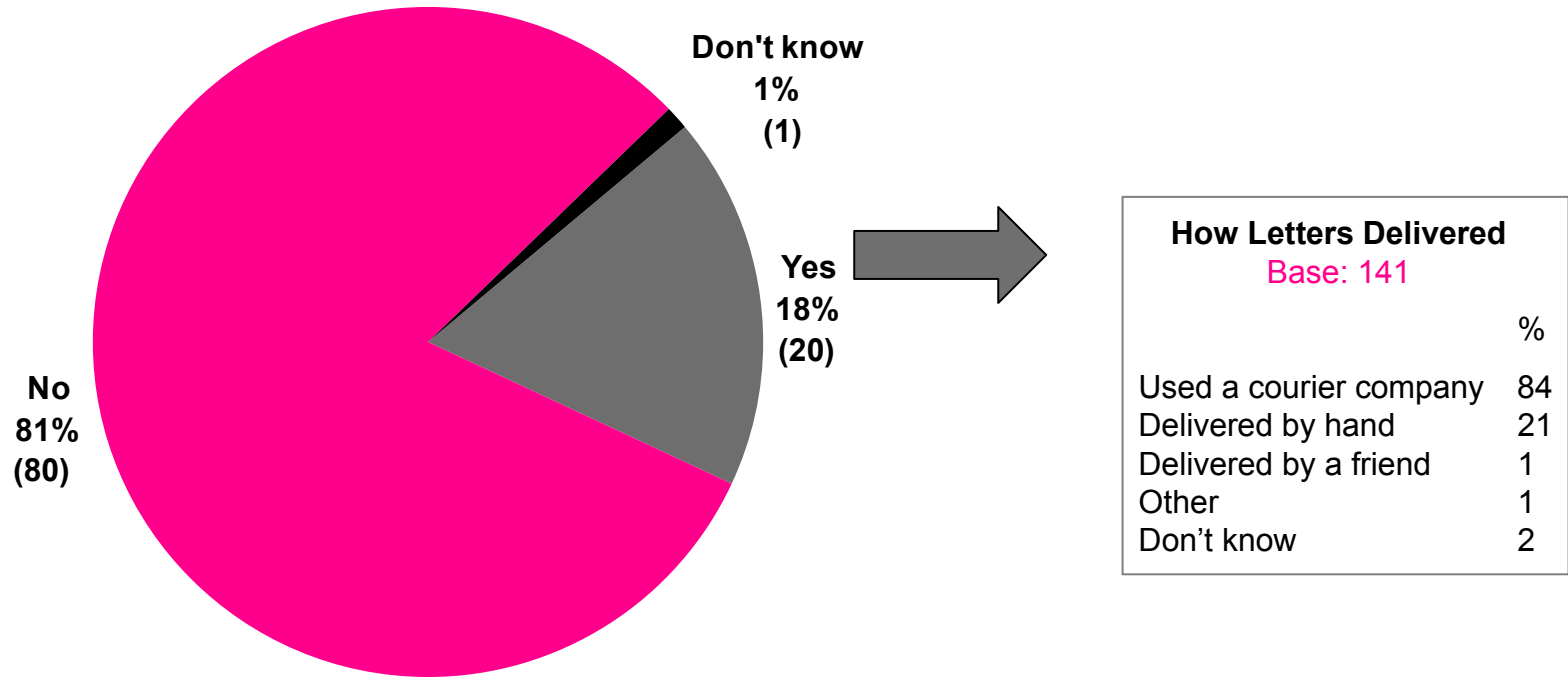
Satisfaction With Postal Delivery Service

Base: All Respondents: 742



Whether Anyone In The Household Has Ever Had Letters (Standard Sized Envelopes) Delivered By Any Means Other Than An Post

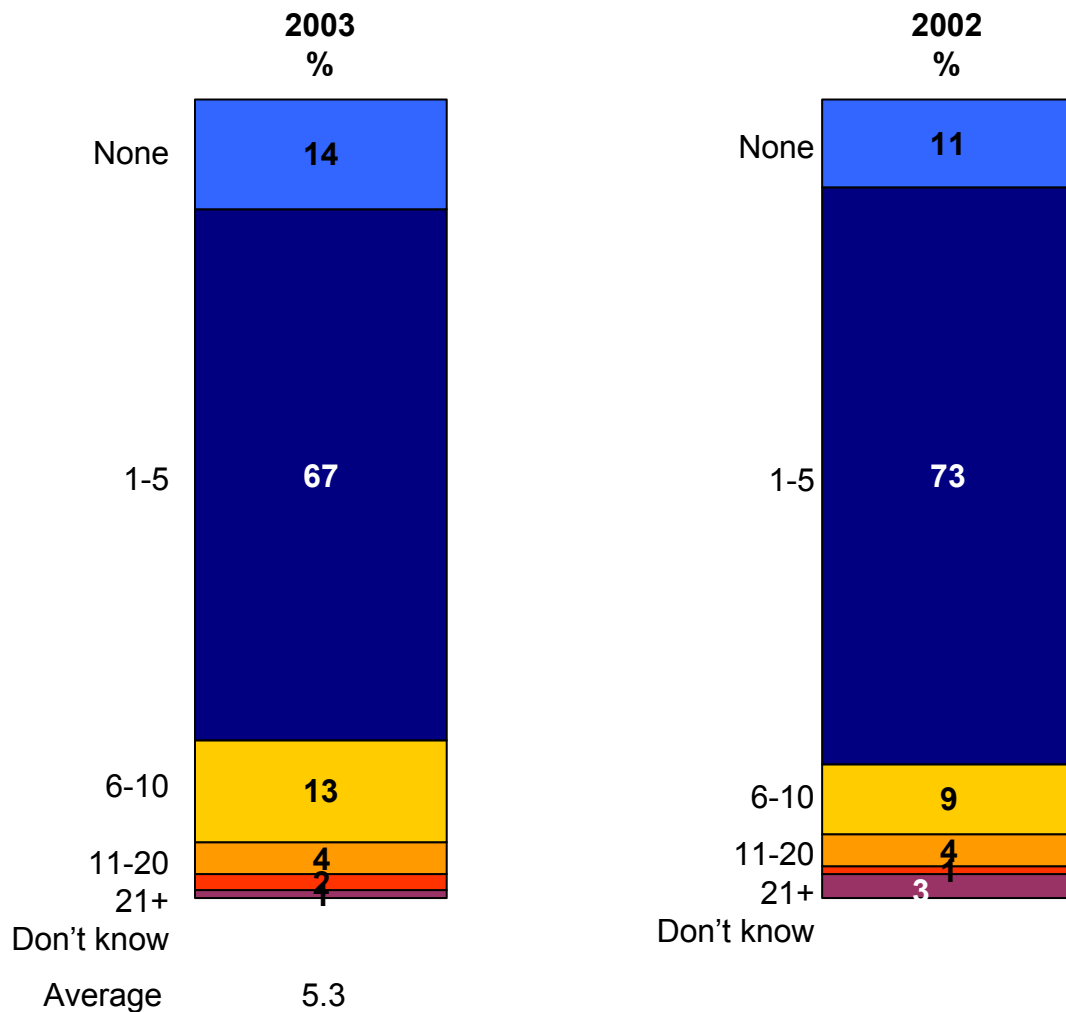
Base: All Respondents: 742



Sending Letters

Items Of Mail (Standard Sized Envelopes) Posted From Home Address Weekly

Base: All Respondents: 742



Items Of Mail (Standard Sized Envelopes) Posted From Home Address Weekly x Household Type

Base: All Respondents Sending Mail: 635

MEAN SCORE SUMMARY

Respondent Sex

Male	6.4
Female	4.7

Social Class

AB	9.2
C1	5.5
C2	5.0
DE	4.3
F	4.2

Region

Dublin	5.7
Rest of Leinster	6.0
Munster	4.4
Connacht/Ulster	5.3

Age

Up to 25*	4.7
25-34	4.2
35-44	5.4
45-54	5.2
55-64	7.0
65+	4.5

No. in Household

One	4.0
Two	5.1
Three	5.5
Four	5.3
Five+	6.2

Weekly Volume Rec'd

1-10	3.5
11-20	5.8
21+	13.4

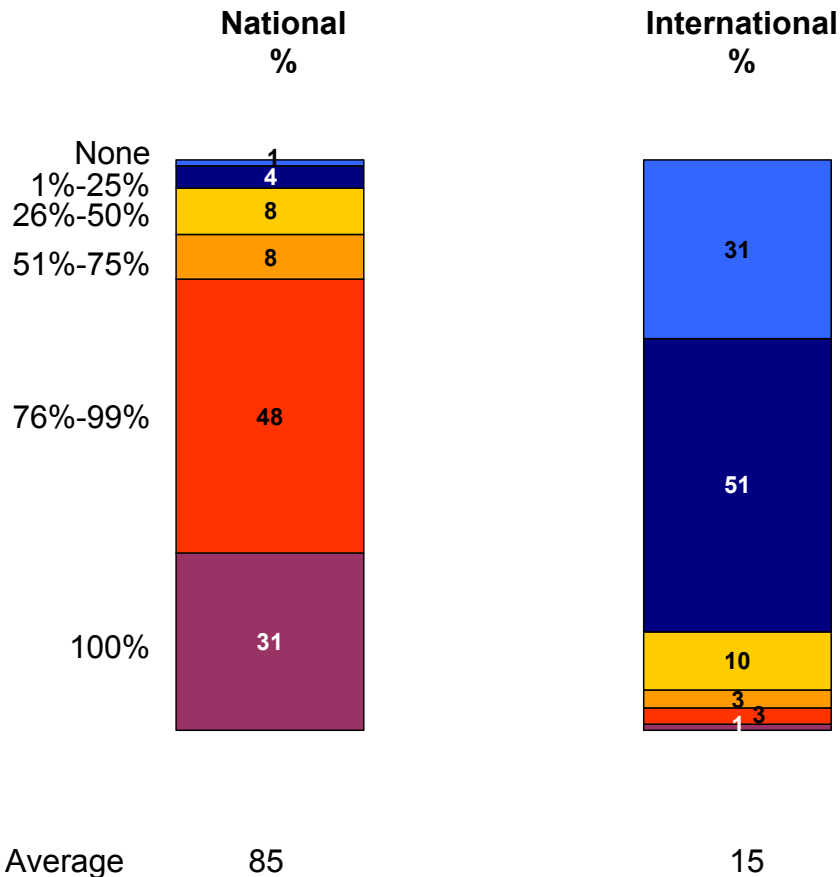
Business from Home

Yes	7.5
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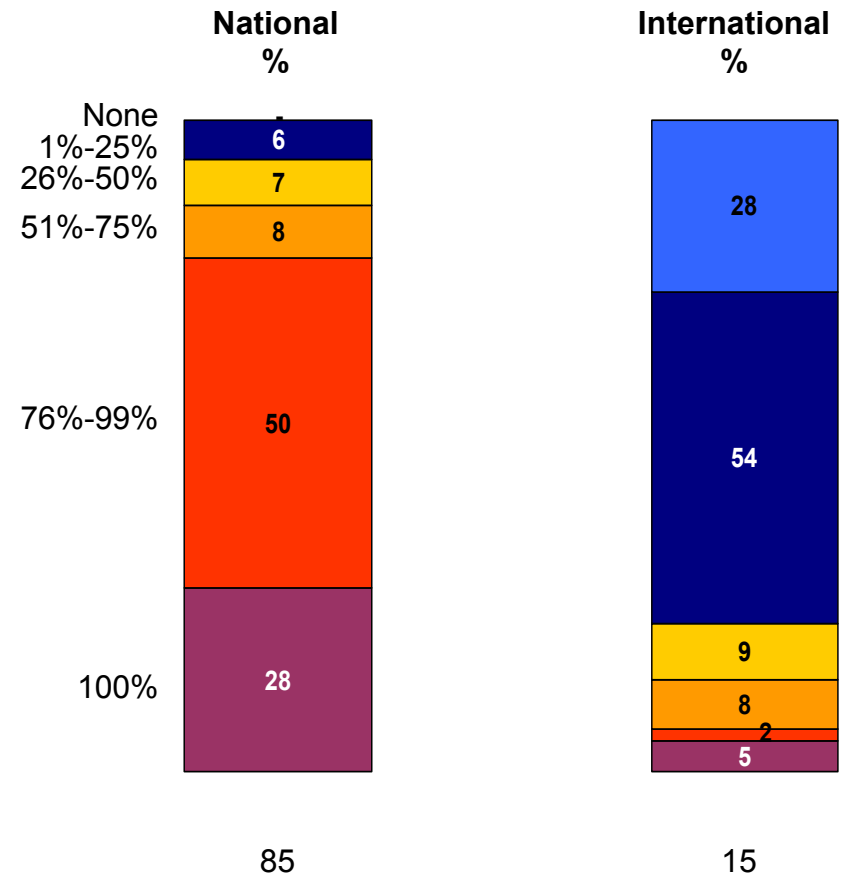
Proportion Of Mail Sent To National Vs. International Destinations

Base: All Respondents Sending Mail: 635

Respondent Based

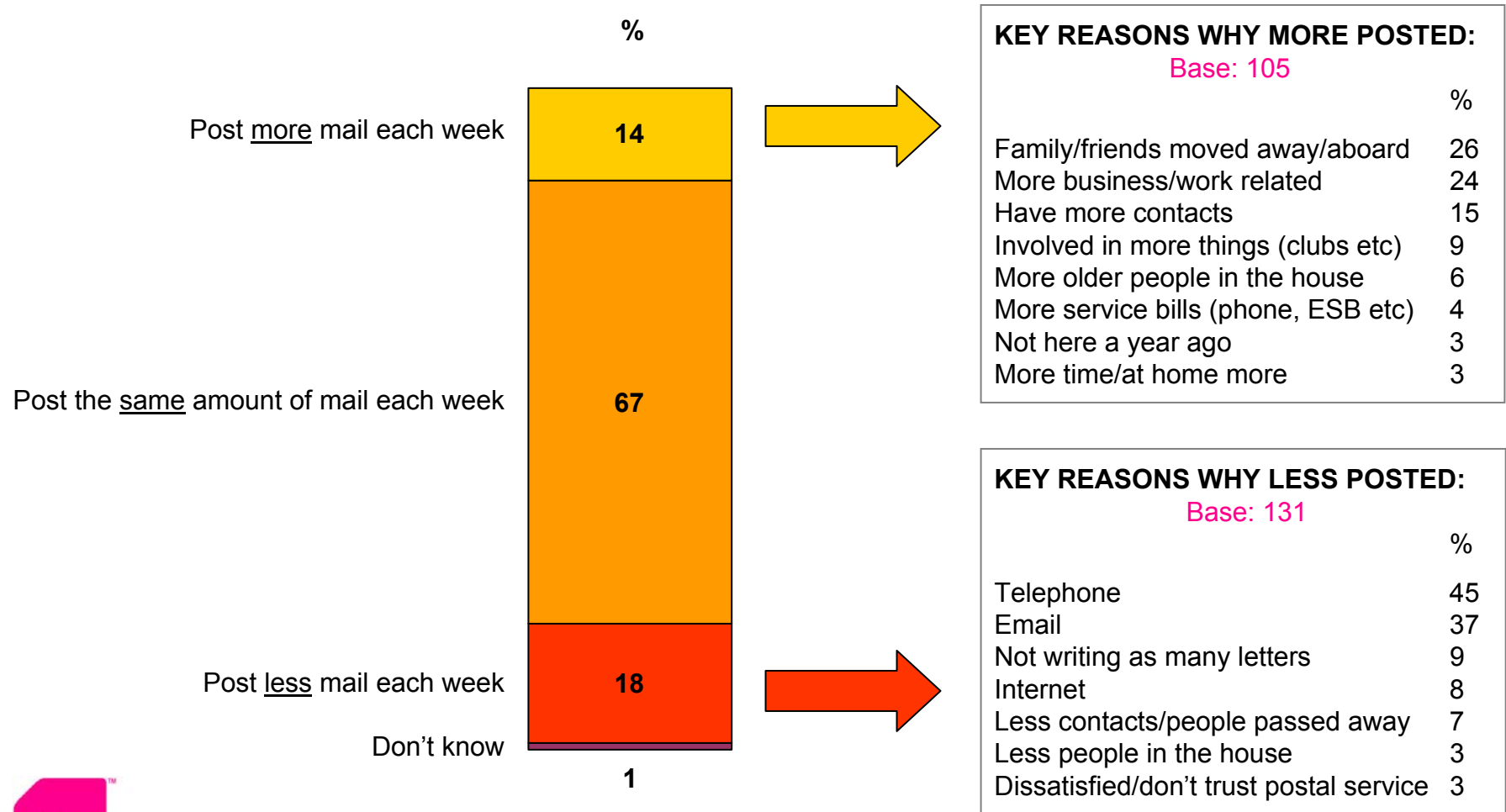


Volume Weighted



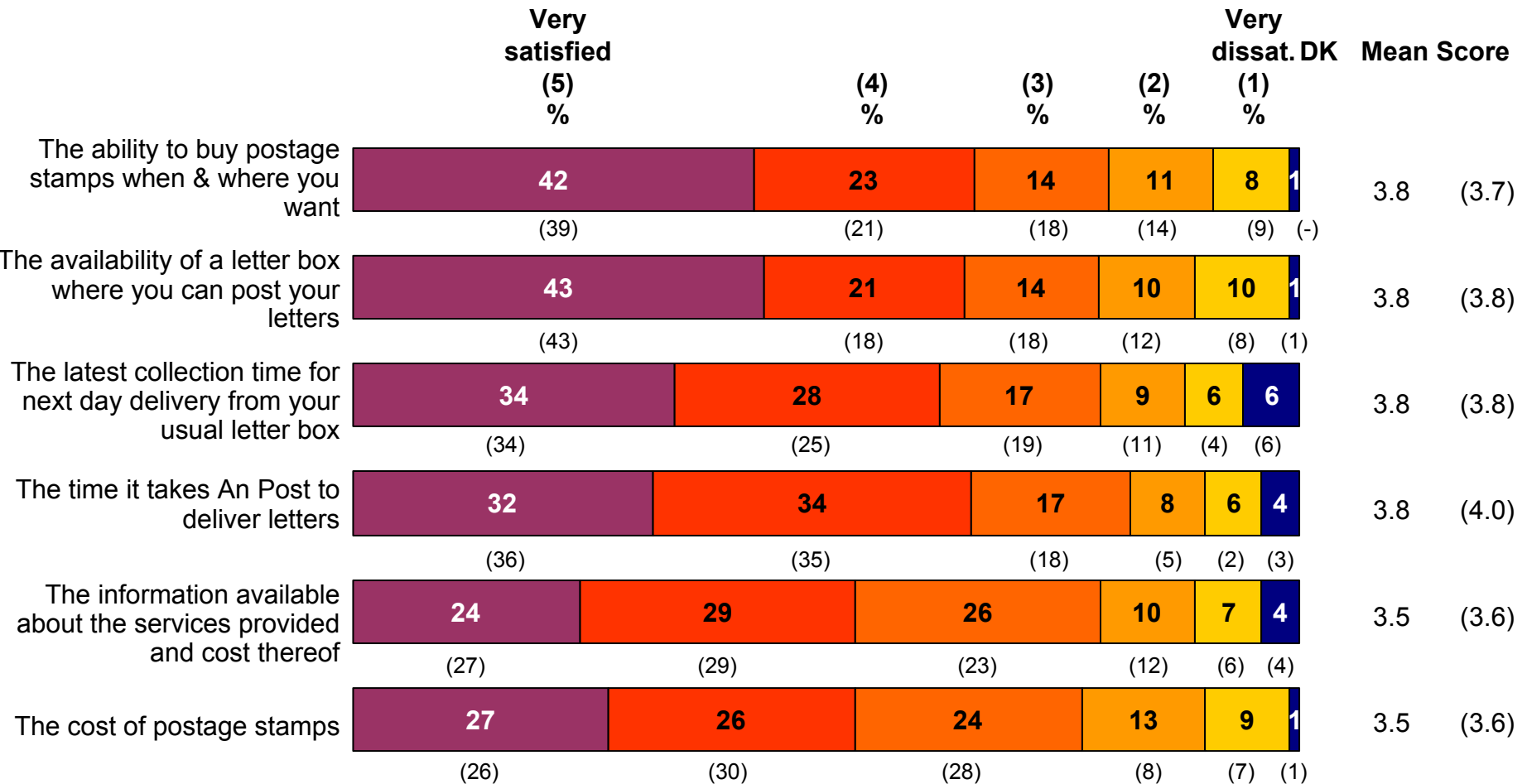
Volume Of 'Personal' Mail Posted Compared With One Year Ago

Base: All Respondents: 742



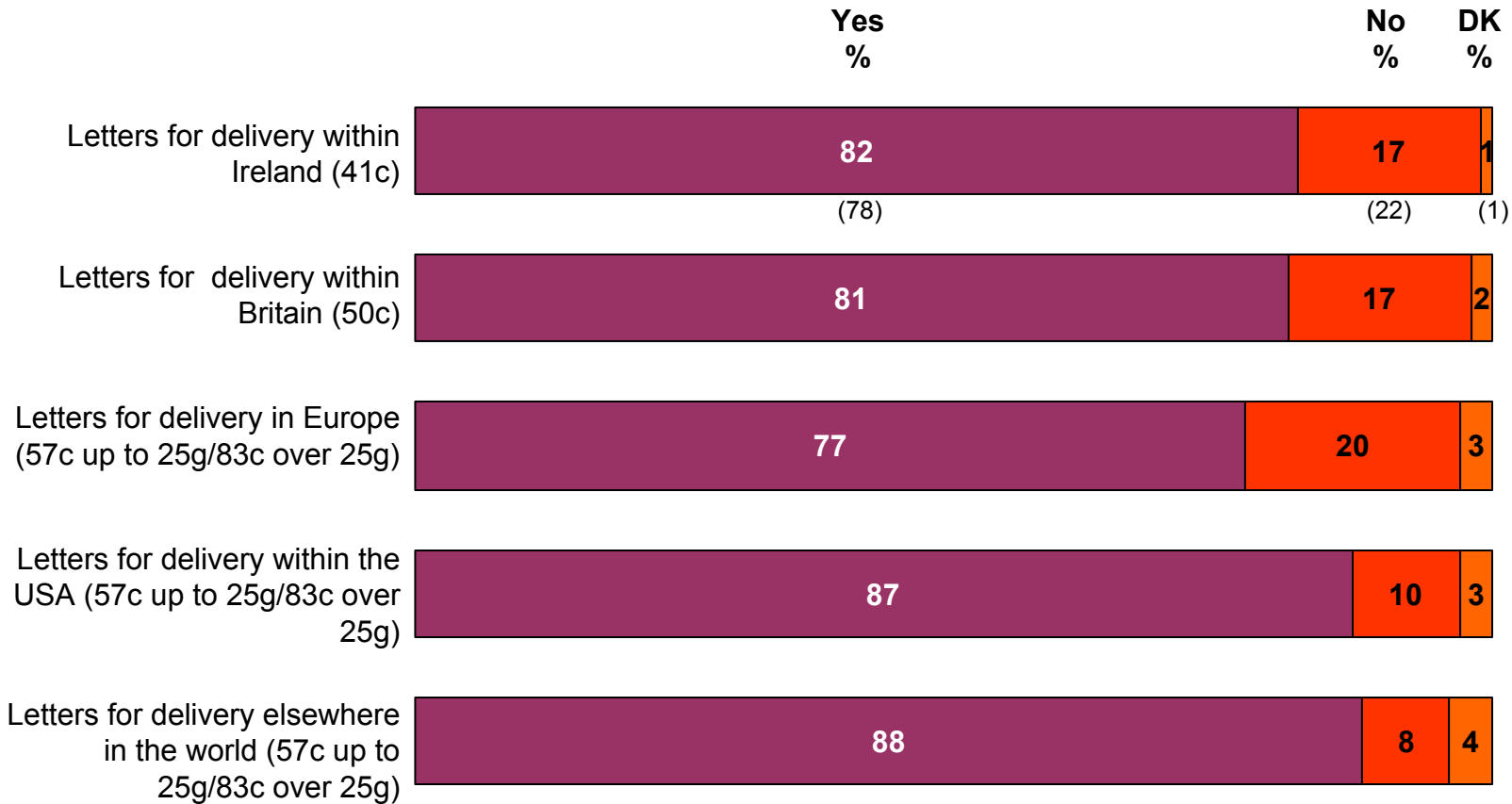
Satisfaction With Aspects Of The Postal Service

Base: All Respondents: 742



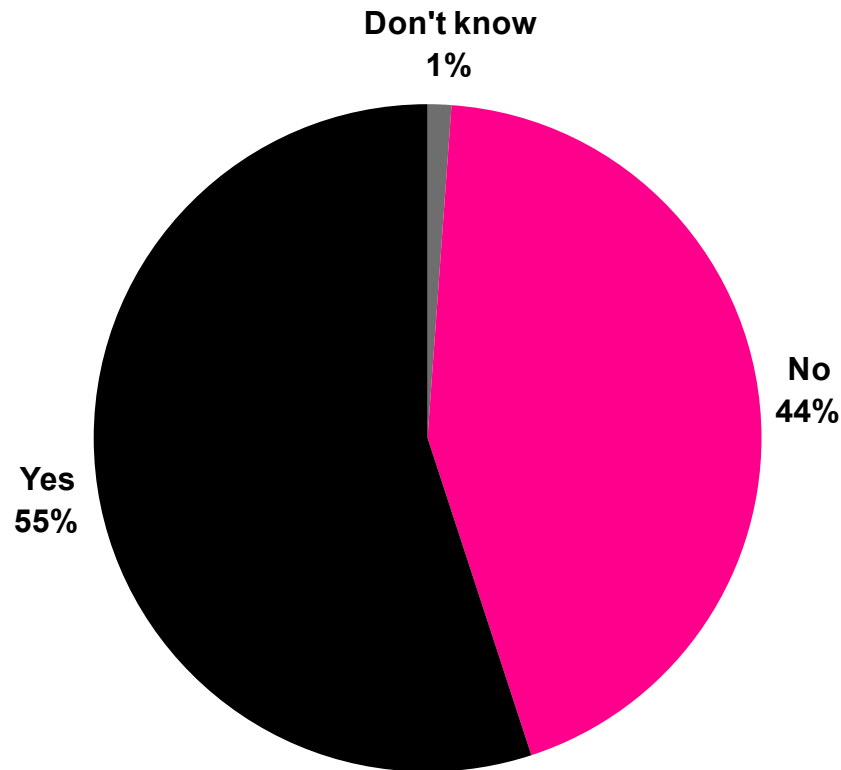
Whether Consider The Cost Of Postage Stamps Represent Value For Money

Base: All Respondents: 742



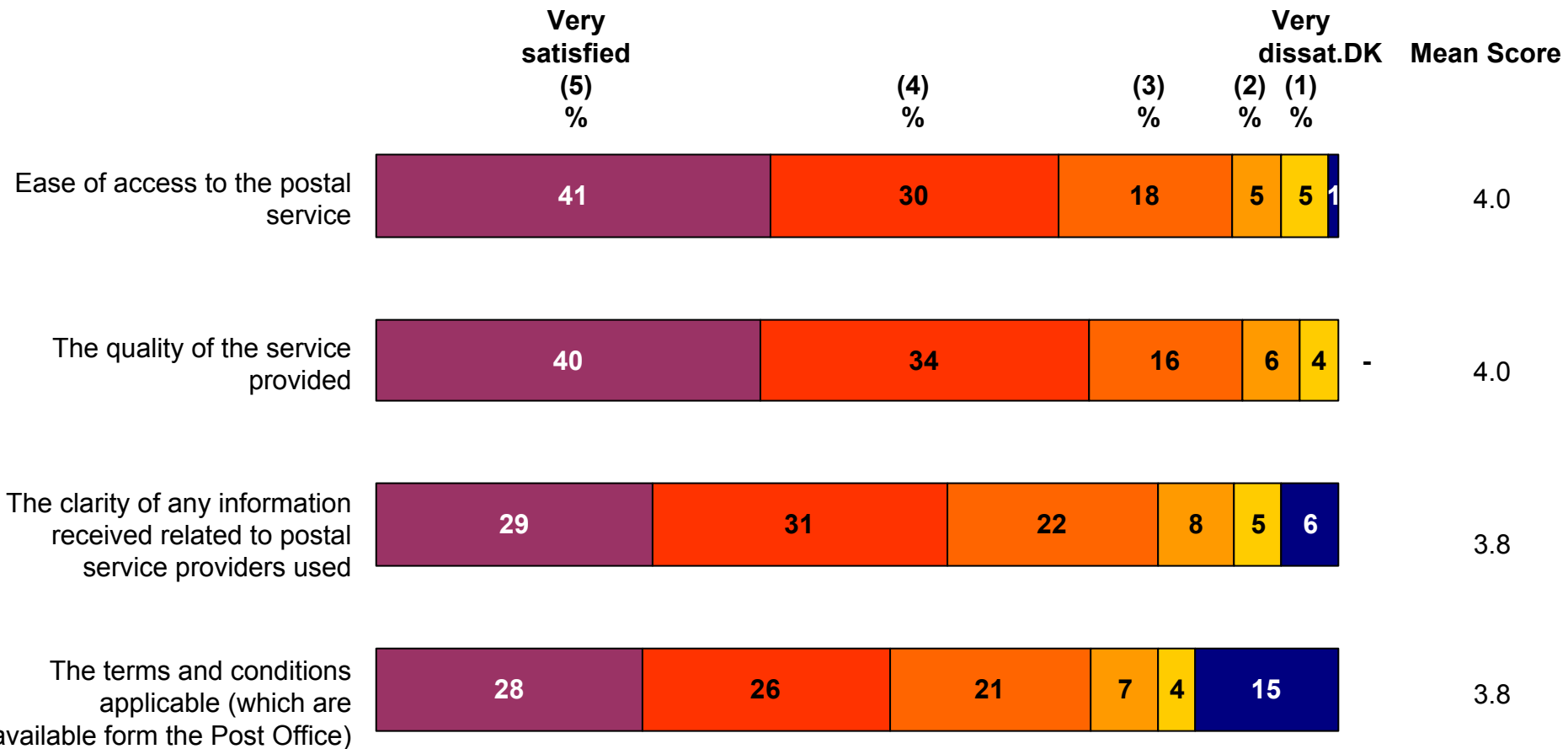
Whether Consider Value For Money If The Cost Of A Postage Stamp For Delivery Within Ireland Was 48c

Base: Those Who Consider 41c To Represent Value For Money: 603



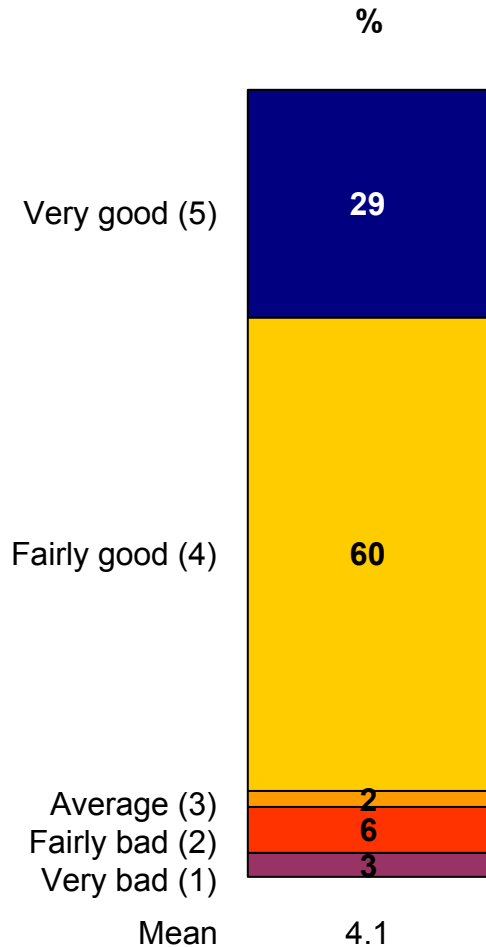
Satisfaction With Additional Aspects Of The Postal Service*

Base: All Respondents: 742



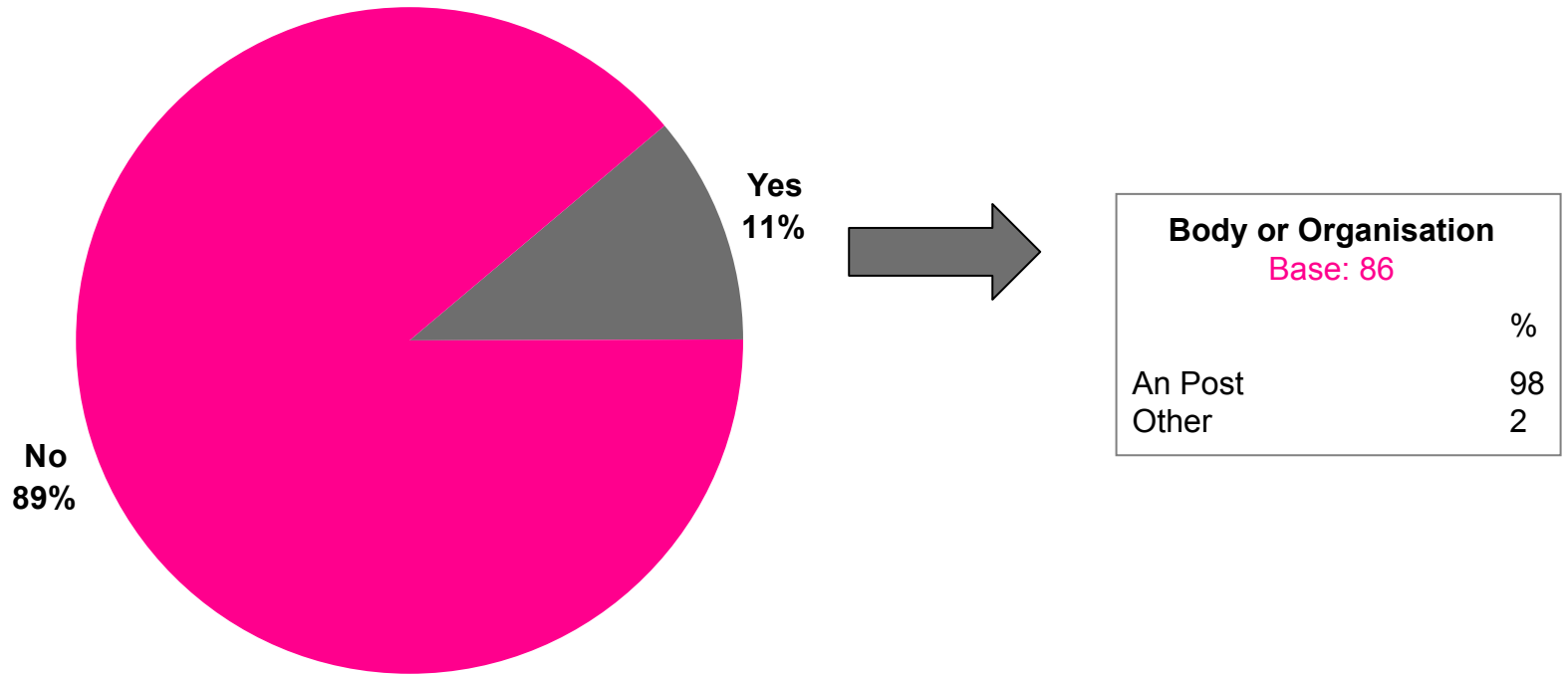
Overall Rating Of The Postal Service In Ireland

Base: All Respondents: 742



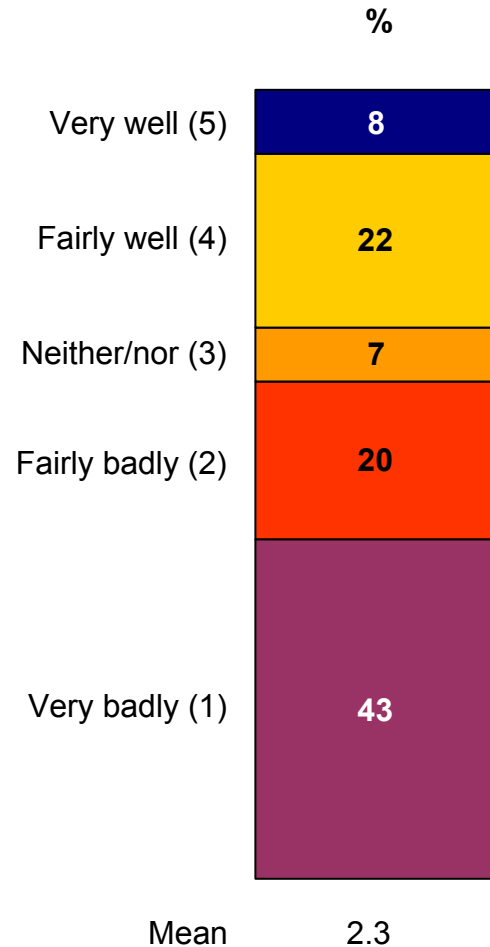
Whether A Complaint Has Been Personally Made In The Past 12 Months

Base: All Respondents: 742



Satisfaction With How The Complaint Was Dealt With

Base: All Who Have Made A Complaint: 86



Management Summary

Receipt of Letters (1)

- Nearly one quarter of households (23%) receive 1-5 items of mail per week. This is unchanged on 2002, however, there are fewer high volume receiving households in the sample. i.e. who receive over 20 items per week (9% vs. 12% in 2002).
- On average 12.2 items are delivered to a household in Ireland on a weekly basis. This figure tends to be higher amongst larger, more upmarket (ABC1) households and those where the home address is used as a business contact address. The volume of incoming mail tends to reflect that of outgoing mail, i.e. households receiving higher volumes also send higher volumes and vice versa.
- In terms of origin of their post, one fifth of households only receive mail from within Ireland, i.e. no mail from overseas. Overall, 88% of mail items received by households is from within the state and 12% is from overseas.
- Nearly 1 in 5 (18%) households have ever received a letter delivered by someone other than An Post, mainly via courier (84%).
- Regarding the breakdown of the type of mail received - on average, personal letters account for two thirds (68%) of mail items received, with the remaining one third (32%) comprising mostly direct mail - 21% personally addressed and 11% not personally addressed.

Receipt of Letters (2)

- When we ask households if they feel mail volumes have changed, around one fifth (21%) say they receive more personal letters than one year ago. Reasons include: there is more business/ work related mail, household members have more contacts or else family/ friends have moved away so are sending more mail. Increased bills and financial correspondence are also factors. Of the 14% reporting a decrease in personal mail versus last year, nearly half attribute this to the telephone and one third to email, as replacement channels of communication.
- Concerning direct mail, 4 in 10 respondents (42%) perceive volumes delivered to them to have increased compared with one year ago. Heavy receivers of direct mail seem to be the least likely to read direct mail items. 6 in 10 householders (61%) always or sometimes read direct mail.
- Satisfaction levels with the postal delivery service are broadly unchanged on 2002, with at least two thirds of respondents very/ fairly satisfied with all aspects rated. The consistency or regularity of the service offered by their postman scores particularly well (84% satisfied). There is a minority of respondents, as with last year, who feel less satisfied with the time of delivery each day.

Sending Letters (1)

- Respondents were asked about their household's posting behaviour in relation to mail in standard sized envelopes. 1 in 7 households do not send any items at all, whilst two thirds post low volumes of between 1-5 items a week. On average, 5.3 items are mailed from a household on a weekly basis. In terms of the destination of items mailed, nearly one third (31%) do not send mail overseas. On average, 85% of mail posted is sent to an address within the state.
- Compared with one year ago, two thirds of households post the same amount of personal mail. There are more households that have experienced a decrease in mail posted than have seen an increase on last year (18% vs. 14%, respectively). Friends/family moving away and more business/ work related correspondence were cited as key factors for increased posting; telephone and email were key drivers for reduced posting activity.

Sending Letters (2)

- Regarding the various aspects rated in this and last year's survey, the service provided by An Post is generally considered very/ fairly satisfactory by half to two thirds of respondents, depending on the aspect. This is very much in line with the 2002 survey. There has however been a marked increase in those dissatisfied with the time it takes for An Post to deliver letters (14% very/ fairly dissatisfied vs. 7% in 2002). As with last time, the two lower scoring aspects relate to information available and the cost of postage stamps.
- When asked their opinion on postage costs, around four fifths of respondents consider it represents good value for money for both national and international delivery (It should be noted that this survey was conducted before the latest price increase). There is some discrepancy however regarding rates to mainland Europe and to USA/ rest of the world, whereby significantly fewer people (although still a high proportion) consider the postage rate to mainland Europe to represent value for money (77% for mainland Europe vs. 87% for US and 88% for rest of the world). This is unsurprising, given that the rate is the same for sending items to Europe as it is to more far away destinations.
- Those considering the 41 cent rate for delivery within Ireland as good value for money (82%) were divided on the new rate of 48 cent, with 55% considering it value for money and 44% not value for money.

General

- Some additional aspects were included in this year's survey, adapted from the most recent Eurobarometer study. Covering ease of access, quality of service, clarity of information and terms and conditions, ratings were positive overall with around 1 in 10 dissatisfied with any one aspect.
- Overall, 89% of respondents consider the postal service in Ireland to be very/ fairly good.
- Complaint handling seems to be an area where An Post performs poorly. Over the past 12 months, 1 in 10 respondents had personally made a complaint about the service and nearly all to An Post. Nearly two thirds (63%) of customers making a complaint were of the opinion that their complaint had been handled very/ fairly badly by An Post.

Postal Services Survey

Residential