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Main findings from an MCA survey on the perceptions of Maltese households using postal services

General information

The MCA is hereby publishing the findings of a survey gauging consumer perceptions based on their experience in purchasing postal services provided in Malta. Key themes investigated include expenditure on postal services, number of letters and parcels received and sent by households domestically and internationally, use of parcel lockers and the number and nature of complaints.

EMCS Advisory Ltd conducted the survey on behalf of the MCA through telephone interviews, lasting approximately 20 minutes, with a total of 501 randomly selected households participating.

Each respondent identified as the individual primarily responsible for handling mail in their household. The contractor ensures respondents' identities remain confidential, and all pertinent information is presented in aggregate form.

Letter mail activity

66% of households did not see a change in the number of addressed letters received per week in the 12 months preceeding the survey. Meanwhile, 28% and 6% of household respondents say they experienced a decrease and an increase respectively in the number of addressed letters received.

When it comes to addressed letters sent, 39% of household respondents say that weekly volumes in the 12 month-period preceding the survey have stayed the same (compared to 34% of respondents in the 2021 survey). 33% of respondents state that they did not send any letters during the same period (40% in the 2021 survey), whilst 26% of respondents say that weekly volumes declined (compared to 24% in 2021). Just 2% of household respondents say they sent more letters per week over the 12-month period prior to the survey (similar share reported in 2021).

Expenditure on postal services

Although 46% of survey participants spent on average up to €5 on posting articles in the year prior to the study, the findings indicated a rise in the proportion of respondents across all spending categories compared

to the previous survey. Particularly noteworthy was an 8-percentage point increase, from 12% in 2021 to 20% in 2023, among those who spent between €5 and €10. The only exception was observed in the group spending between €20 and €30, which remained stable at 5%.

Parcel mail activity

Regarding items received from overseas, there was a slight decrease, with the percentage of respondents reporting an increase in parcels received declining from 31% in 2021 to 28% in 2023. Moreover, whilst just over quarter of the respondents said they did not receive any parcels from abroad, 8% experienced a decrease in the number of parcel received and a further 38% reported no change from the previous twelve months.

The number of households reporting receipt of locally ordered goods dropped from 69% in 2021 to 56% in 2023. However, it is important to recognize that certain COVID-related restrictions, still in effect in 2021, might have impacted the volumes of local goods ordered on-line at the time and therefore, could have contributed to the higher percentage.

DHL and MaltaPost emerged as the two main players active in the delivery of parcel mail items, amongst other service providers. DHL was indicated by 44% of respondents, followed by MaltaPost at 37%.

74% respondents prefer to have their parcels delivered to their homes, while 12% choose their workplace address as the delivery point. Parcel lockers as a delivery solution were the least favoured among respondents, with only 1% indicating their usage in the twelve months prior to the survey.

MaltaPost's services

MaltaPost is currently the sole operator providing inland and cross-border services within the universal services area. This position entails various obligations as laid down in the legal provisions, such as conducting at least one daily collection and delivery of postal articles weighing up to 20 kg, handling registered postal articles daily, and providing a basic counter service throughout Malta.

The MCA survey also delved into the perceptions of households on service quality and value-for-money of the universal postal service offered by MaltaPost. Other aspects that were addressed included; speed of delivery, acceptability of a 5-day delivery week, perception of the experience of visiting the post office and complaint handling.

Delivery Lead time

Rising from 39% in 2021 to 46% in the current survey, respondents consider a next-day delivery as acceptable for addressed letter mail, whilst 39% say they consider a two-day delivery as an acceptable lead time. There was a marginal increase from 10% in 2021 to 12% in 2023 who consider a three-day delivery as acceptable.

Acceptability of a 5-day week for delivery

The share of respondents who would find the delivery of postal articles over five days instead of the current six-day week as acceptable increased by 4 percentage points from 2021 to reach 62% in 2023. 21% of respondents consider a five-day delivery week to be a minor inconvenience, while 12% perceive it as a major inconvenience. Regarding the willingness to pay higher prices to sustain six-day delivery, 62% of respondents deem it reasonable to pay such a premium.

Paying an optional stamp surcharge to support environmental initiatives.

When queried about the option of paying an additional stamp surcharge, with the proceeds earmarked by the postal operator to support an environmental cause, 60% of respondents indicated their willingness to pay such a surcharge.

Visiting a Post office

70% of respondents claimed to have visited a post office in the preceeding 12 months, which marks an increase of 8 percentage points from the 62% recorded in the previous survey. 84% of respondents also say they have visited a MaltaPost branch as opposed to 10% who visited a sub-post office branch.

48% of respondents identified payment of bills as the reason to visit a MaltaPost branch (an increase of 10 percentage points from 2021), followed by 39% saying that parcel collection was a reason for the visit (down from 47% in 2021).

Regarding reasons to visit a MaltaPost sub-post office, 50% of the respondents identified the collection of parcels, whilst 32% frequent them to pay bills. Visiting a sub-post office to collect registered letters has dropped notably from 18% in 2021 to 4% in 2023.

Engagement with MaltaPost

15% of respondents have contacted MaltaPost, mainly to ask about the status of a parcel (42%) followed by 29% who enquired about products and services. There was a decline of 19 percentage points, dropping from 34% in 2021 to 15% in 2023, in the number of respondents who reached out to MaltaPost to file a complaint. Among those who lodged a complaint, 45% did so due to misdelivery of a postal article, while 36% reported loss of mail.

Complaint Handling

Among respondents who filed a complaint, 46% said they were very satisfied with MaltaPost's handling of their complaint. This is up from 34% of respondents who indicated satisfaction or high satisfaction with MaltaPost's complaint handling in 2021.

Overall Satisfaction with MaltaPost Services

72% of the surveyed respondents expressed satisfaction or high satisfaction with MaltaPost's services, showing a relatively stable rate compared to the 70% reported in the previous survey. Dissatisfaction remained consistently low, with only 7% of respondents expressing dissatisfaction, aligning with the findings of the 2021 survey.

For a more comprehensive picture of this survey, a [presentation](#) of the main findings is available in presentation format on the MCA website.