Survey on the Use of Postal Services 2016 (Resident population)

Main results

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Introduction

ANACOM has been conducting surveys every two years on the use of postal services by Portugal's resident population with the purpose of assessing levels of usage and user perception as to the quality of postal services by residential users.

This **Survey on the use of postal services** was carried out in November 2016. A summary of the methodology used is provided in an annex to this report.

Some of the results of this survey are presented below[1]. In addition to this brief summary, a table of all the questions is provided.

I. Summary

- According to the Survey on the use of postal services, the decreasing trend in the use of traditional postal services is continuing:
  - in 2016, 47 % of all individuals used permanent post offices, 5 percentage points less than in 2014;
  - the percentage of individuals who sent mail was maintained (29 %), in spite of a fall in the use of the postal services analysed: non-priority mail (14 %, -5 percentage points), registered mail (8 %, -5 percentage points), priority mail (6 %, -6 percentage points), and parcels (7 %, -6 percentage points);
  - There was a decrease in the share of the population who receive correspondence (67 % of individuals, -23 percentage points than in 2014).
- Regarding the new services that are additionally provided at post offices, “mobile phone account top-ups”, used by 18.3 % of respondents, was the service that most increased between 2014 and 2016 (+10.1 percentage points). Awareness and usage of other less sought-after services increased, such as “payment of road tolls” and the sale of “lottery tickets” and “transport tickets”.

  According to this survey, only 9.5 % of the respondents stated they knew about Banco CTT, which started operating in March 2016. Less than 4 % of respondents actually used the services of Banco CTT.

[1] All statements in this report about the behaviour of users of postal services are based on the responses given to the survey; as such, it is possible that these results are influenced by errors resulting from non-representative responses.

- E-commerce became a new business opportunity for postal service providers, notably in the area of parcel distribution.

  According to the European Commission, there was an increase in the percentage of individuals who made online purchases or orders in Portugal (23 % of individuals aged 16 to 74, 6 percentage points more than in 2014). However, the use of e-commerce in Portugal is still below the EU28 average (-22 percentage points).

  In this context it is important to emphasise that contrary to what happened with the other postal services the percentage of individuals who received parcels (22 %) did not decrease.

- As for consumers' level of satisfaction with the services provided, results show that:

  - Respondents reported being satisfied with the overall evolution of post offices in 2016.

  - "Performance of counter staff", "mail delivered without damage" and "clarity and transparency of the information provided" were the factors providing the most satisfaction for customers of post offices and postal agencies (8.6 to 8.5 average points).

  - On the other hand, the "waiting time" (11 minutes on average), the "number of postal establishments" and "delivery of mail on time" prompted the lowest satisfaction levels.

  - As for sending postal items, there was a significant increase in the level of satisfaction regarding priority mail (8.4 in 2016), which moved to first place in the ranking of services analysed.

    "Secrecy/inviolability of correspondence" continues to elicit the most satisfaction for customers of the various postal services, particularly for priority ("blue") mail, followed by "mail delivered without damage" (except for "green" - pre-paid mail), and finally by "price", with the least satisfaction, particularly for registered mail and parcels.

  - Most respondents consider that the frequency of post delivery is appropriate.

Approximately 8.5 % mentioned that the post delivery is less regular than necessary, showing a lower average satisfaction with the “regularity of post delivery” (mostly for those who receive mail every 2 days although they need it every day).

It should be mentioned that according to this survey around 62 % of those receiving mail had the perception that post is delivered in the area of their residence on a daily basis (-25.2 percentage points than in 2014) and 34 % had the perception that post is delivered every two days.

- 99 % of letters customers and 95 % of parcels customers consider the place for receiving mail to be appropriate.

- According to the European Commission, the problem most mentioned by the respondents in Portugal and in the EU28 who made online purchases was “parcel delivery time longer than stipulated”.

II. Use of post offices and postal agencies

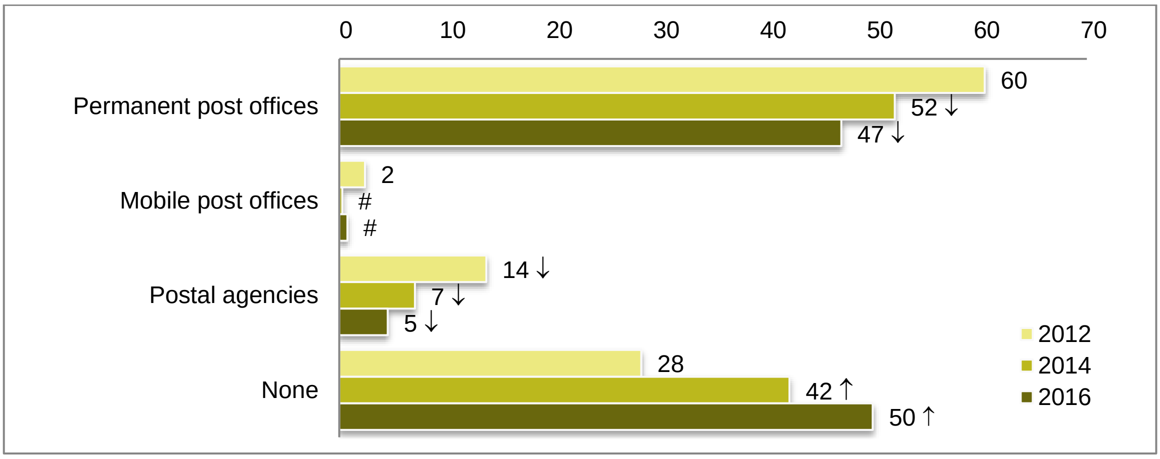
This chapter summarizes the results regarding the use of post offices and agencies, the average waiting time and the satisfaction with the services provided.

Post offices and postal agencies used

In 2016, **47 % of people used permanent post offices**. Around 50 % of respondents did not use these facilities.

In terms of user numbers, relative declines were reported for all points of access to the network.

Graph 1 – Percentage of users of network providing service to the public



Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2012, 2014, and 2016

Base: Individuals aged 15 years or older (excludes non-responses)

Note 1: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.[2]

Note 2: Multiple choice question

Note 3: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.[3]

Users of post offices and postal agencies mostly used **branches located in their area of residence** (86.6 %), although there has been a significant increase in the use of post offices and agencies located near their workplace (from 5.1 % in 2014 to 10.9 % in 2016[4]).

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[2] The coefficient of variation is considered as an indicator for evaluating the sampling error, based on the variance of the "proportion" or "average" estimator (as appropriate) of a simple random sample. The following classification was used: reliable estimate when the variation coefficient of is under 10 %; acceptable estimate when the variation coefficient is above or equal to 10 % % and under 25 %; unreliable estimate when the variation coefficient is above or equal to 25 %.

[3] A statistical test was used of the difference between two proportions for large and independent samples with a confidence level of 95 %.

Services used in post offices and postal agencies

"**Sending correspondence**" was the service most used (34.9 %) by users of post offices and postal agencies in 2016, followed by "sending/receiving parcels" and "registered mail".

"Mobile phone account top-us", used by 18.3 % of respondents, was the service whose usage increased most between 2014 and 2016 (+10.1 percentage points). Usage of other less sought-after services such as the "payment of road tolls" and the sale of "lottery tickets" and "public transport tickets" also increased.

Table 1 – Awareness and use of certain services provided in post offices and postal agencies

	Awareness	Use
Mail - Sending correspondence (non-priority, priority, prepaid, express)	72.4 ↓	34.9
Mail - Sending\Receipt of parcels	44.3 ↓	22.3 ↓
Mail - Sending\Receipt of registered mail	43.3 ↓	21.0 ↓
Telecommunications - Mobile phone account top-ups	25.1	18.3 ↑
Financial services - Postal order and money orders (includes receipt of pensions)	26.8 ↓	18.2
Financial services – Payment of services / taxes	30.5 ↓	16.3 ↓
Other services – Road tolls	13.5 ↑	7.6* ↑
Sale of other products – Lottery tickets	16.1 ↑	5.9* ↑
Sale of other products – Public transport tickets	8.6* ↑	4.0* ↑

Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2016

Base: Individuals aged 15 years or older using post offices or postal agencies

Note 1: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate. Only the hypotheses which usage have a reliable or acceptable estimate are used.

Note 2: Multiple choice question without suggestion of responses (spontaneous notoriety).

Note 3: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

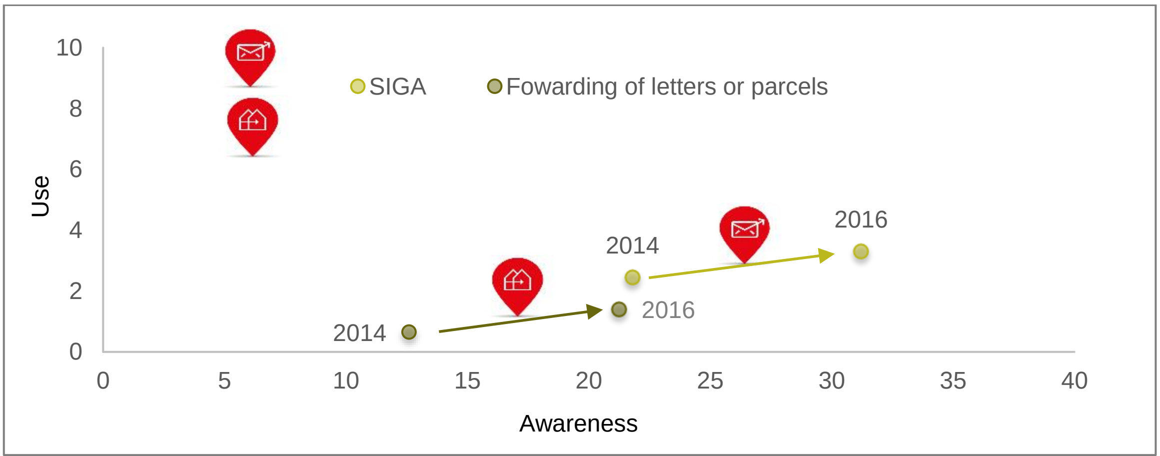
[4] These estimates present a coefficient of variation above or equal to 10 % and lower than 25 %, being considered acceptable estimates.

According to this survey, about 9.5 % of the people surveyed stated they knew about Banco CTT, which started operating in March 2016. Fewer than 4 % of respondents actually used the services of Banco CTT.

About 95 % of post office and postal agency users were unaware of (or did not remember about) the possibility of purchasing “tickets for shows”, "certification of photocopies", and “books, postcards, CDs, DVDs, games or other items” in these establishments. Other financial services that users are largely unaware of are “financial products (includes savings certificates, pension plans, investment funds, capitalisation insurance)”, “Internet access”, and "requesting exemption from user charges for access to the health service (SNS)”.

SIGA services and the Forwarding of letters or parcels increased their awareness level from 2014 to 2016, but the usage by recipients of this type of mail remained low (3.3 % and 1.4 % in 2016, respectively).

Graph 2 – Awareness and use of certain convenience services



Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2016

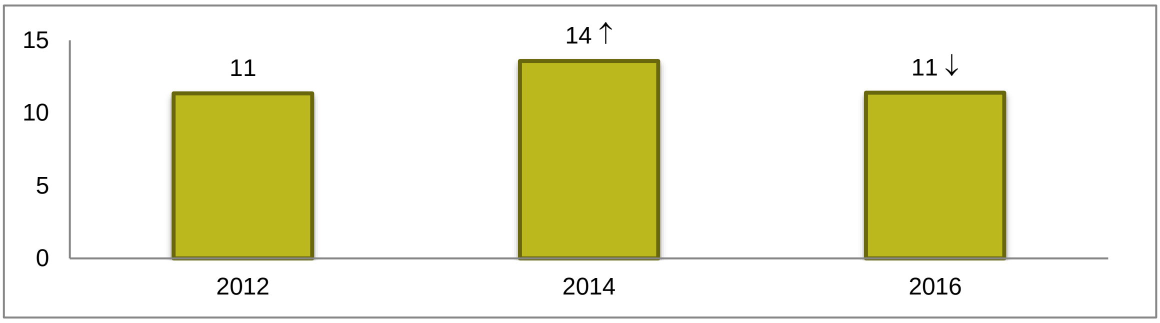
Base: Individuals aged 15 years or over who received letters or parcels bearing their name in the last 12 months (excludes non-responses)

Note: Directly asked if they “know or have heard of” the service.

Average waiting time

The average waiting time perceived by users of post offices and postal agencies was around 11 minutes. It should be mentioned that the waiting time is one of the aspects that generates lowest satisfaction levels in users, and that complaints received by ANACOM about this issue increased in the second half of 2016.

Graph 3 – Waiting time at post offices and postal agencies



Unit: minutes

Source: ANACOM, Survey on the Use of Postal Services, December 2012, 2014, and 2016

Base: Individuals aged 15 or over an in relation to the most commonly used branch (excludes non-responses)

Note: Margin of error less than 1 minute in post offices and less than 2 minutes in postal agencies. An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

User satisfaction with services provided

“Performance of counter staff”, “mail delivered without damage” and “clarity and transparency of the information provided” were the factors giving rise to highest levels of satisfaction for users of post offices and postal agencies in 2016 (average of 8.6 to 8.5 points). Meanwhile, "waiting time", “number of postal establishments” and “delivery of mail on time” generated the lowest levels of satisfaction (average of 8.3 points).[5,6]

Compared to 2014, “clarity and transparency of the information provided” was the factor that most contributed to increasing the satisfaction level of the users of post offices and postal agencies.

The importance given by users to each of the abovementioned factors is similar for all analysed factors (9.2 to 9.3 points)[7].

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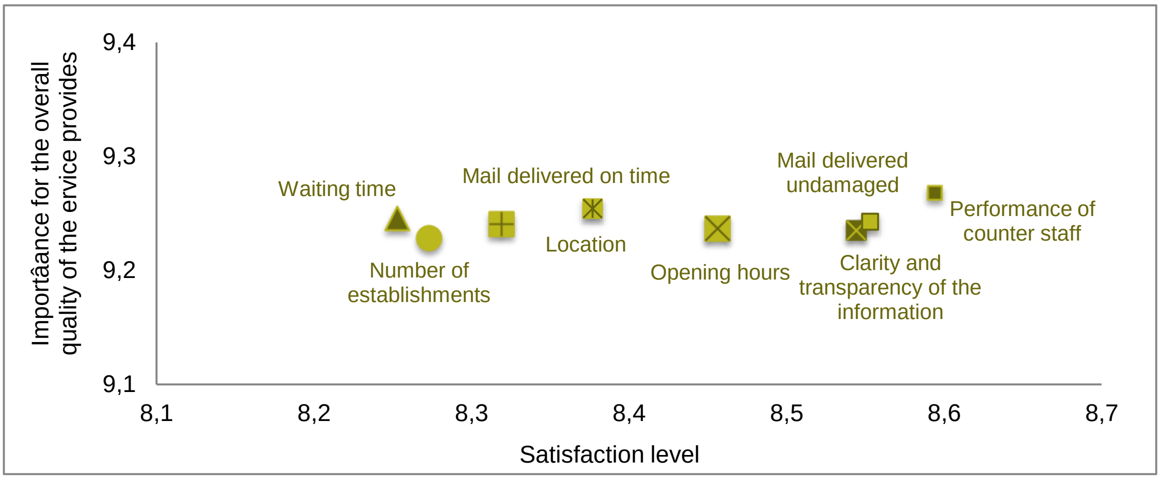
[5] There was a significant statistical difference between the two set of factors mentioned, according to the test of difference between two proportions, with a confidence level of 95 % %.

[6] Respondents were asked to respond as follows: “*On a scale of 1 to 10 (1 – not at all satisfied and 10 – very satisfied), rate your satisfaction level in relation to:*

a) Clarity and transparency of the information provided;
b) Performance of counter staff (knowledge of service, friendliness, and ability to solve problems);
c) Waiting time;
d) Opening hours;
e) Location of postal establishments;
f) Number of postal establishments;
g) Mail delivered on time;
h) Mail delivered without damage

[7] Respondents were asked to respond as follows: “*On a scale of 1 to 10 (1 – not at all important and 10 – very important), rate the importance for the quality of the service provided of the: [same factors as in the previous note]”*

Graph 4 – Evaluation of the most important aspects and satisfaction at post offices and postal agencies



Unit: Scale 1 (not at all important / satisfied) to 10 (very important / satisfied)

Source: ANACOM, Survey on the Use of Postal Services, 2016

Base: Individuals aged 15 years or over using post offices or postal agencies (excludes non-responses)

Note: The absolute margins of error in the averages on a scale of 1 to 10 do not exceed 0.1 in the evaluation of the importance and satisfaction of the parameters.

III. Use of postal services – sending mail

The results of the survey regarding the sending of items of mail are given next, with specific reference to the relative importance of each type of mail item, destination, level of user satisfaction with provided services, and preferences regarding the delivery of mail objects (price, speed, loss of mail)

Sending mail items

Regarding the sending of mail, the main services used by respondents were sending letters (26 %), particularly non-priority mail (14 %), and sending parcels (7 %). Use of postal services continues to see a general decline, even if overall the percentage of individuals who used some of the postal services analysed is unchanged (29 %).

Table 2 – Usage of certain postal services in the last 12 months

	2012	2014	2016
Letters	**50 ↓**	**27 ↓**	**26**
Correio normal (non-priority mail)	36 ↓	18 ↓	14 ↓
Correio azul (priority mail)	29 ↓	14 ↓	7 ↓
Correio verde (prepaid mail)	8 ↓	2 * ↓	#
Registered mail	29 ↓	13 ↓	8 ↓
Parcels	**18 ↓**	**13 ↓**	**7* ↓**
Express service	**6 * ↓**	**2 * ↓**	**#**
None of these postal services	**45 ↑**	**70 ↑**	**71**

Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2012, 2014, and 2016

Base: Individuals aged 15 years or over (excludes non-responses)

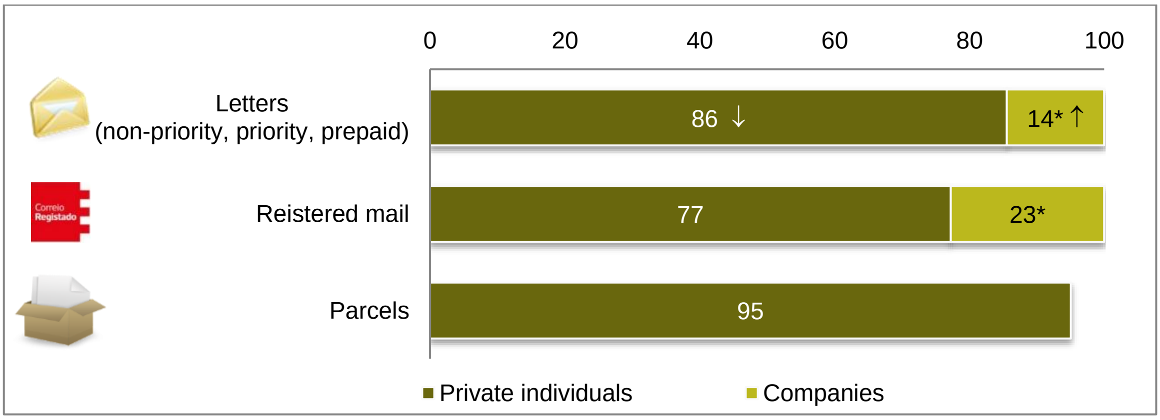
Note 1: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Note 2: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

Destination of sent correspondence and parcels

Most letters and parcels sent by private customers in 2016 were sent to other private individuals. The percentage of private customers who mostly send letters to companies increased (14 % in 2016 against 8 % in 2014).

Graph 5 – Destination of majority of sent mail



Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2016

Base: Individuals aged 15 or over using respective postal services

Note: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate. An upward pointing arrow signals a statistically significant increase between 2014 and 2016, and a downward pointing arrow signals a statistically significant decline.

Mainland Portugal was the main destination of sent correspondence (92 % of users), registered mail (90 %), and of parcels (61 %). About 29 % of users mentioned having sent parcels to Europe, and 8 percent, to the rest of the world.

User satisfaction with sending services provided

On a scale of 1 to 10, the average level of satisfaction was reported between 8.0 and 8.4, depending on the service considered. The level of satisfaction with priority mail had a significant increase (8.4 in 2016), reaching the first place in the ranking of analysed services.

Table 3 – Average level of satisfaction with postal services

		2012	2014	2016
Letters	Non-priority mail (normal)	8.3	8.2	8,2
	Priority mail (blue)	8.5 ↓	8.1 ↓	8,4 ↑
	Prepaid mail (green)	8.5	7.8 ↓	8,0
	Registered mail	8.4	8.1 ↓	8,2
Parcels		8,4	8.0 ↓	8.1

Unit: %

Source: ANACOM, Survey on the Use of Postal Services, December 2012, 2014, and 2016

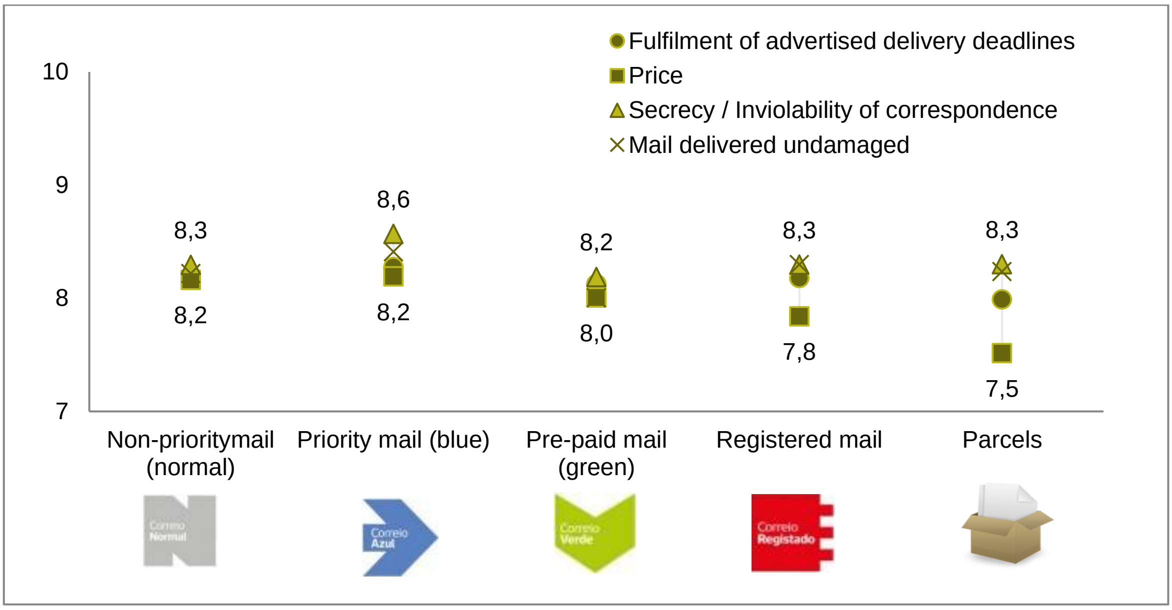
Base: Individuals aged 15 or over using respective postal services (excludes non-responses)

Note 1: The absolute margins of error in the averages on a scale of 1 to 10 do not exceed 0.38 absolute points.

Note 2: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

“Secrecy/'inviolability of correspondence" continues to be the factor giving the most satisfaction to customers of the different postal services, particularly for priority mail, followed by "mail delivered without damage" (except for prepaid mail) and lastly, with lower satisfaction, the “price”, particularly in the case of registered mail and parcels.

Graph 6 – Average level of satisfaction with postal services according to certain evaluation aspects



Unit: Scale 1 (very dissatisfied) to 10 (very satisfied)

Source: ANACOM, Survey on the Use of Postal Services, 2016

Base: Individuals aged 15 or over using respective postal services (excludes non-responses)

Note: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Preferences in the delivery of mail items (price, speed, loss of mail)

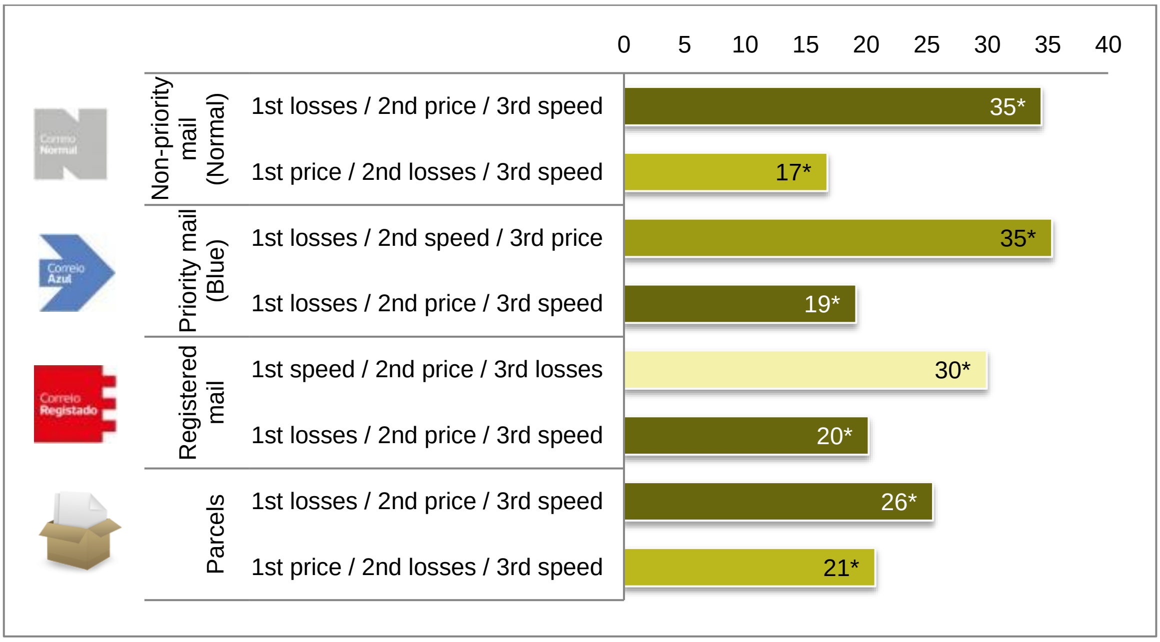
People surveyed were asked to order the following options by type of service used:

- faster delivery but at a higher price,
- slower delivery but at a lower price,
- less mail lost.

These were the results:

- in the case of non-priority mail (*correio normal*) and parcels, the most frequent ordering (35 and 26 %, respectively,) was: 1st less mail lost, 2nd lower price and 3rd faster delivery;
- for priority mail (*correio azul*) users, the ordering was more significant (35%): 1st less mail lost, 2nd faster delivery, and 3rd lower price;
- for registered mail (*correio registado*) users, the most significant ordering was: 1st faster delivery, 2nd lower price, and 3rd less mail lost (30 %).

Graph 7 – Order of preference in the delivery of mail per type of postal service, TOP2



Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2016

Base: Individuals aged 15 or over using respective postal services

Note: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

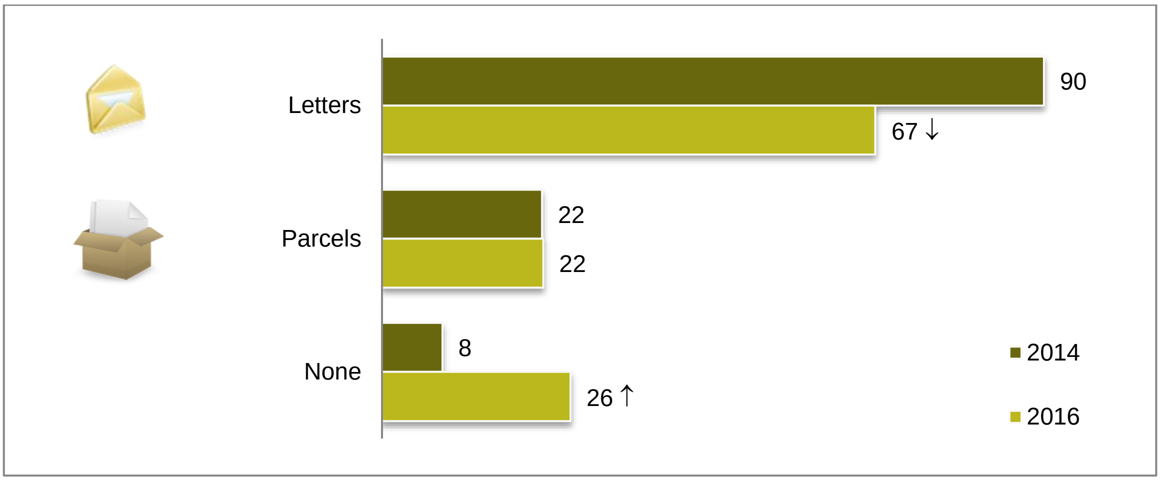
IV. Use of postal services – receipt of mail items

Regarding the receipt of mail, this survey made it possible to collect information about the volume and type of object received, the location and the frequency of delivery.

Receipt of mail

The proportion of individuals who received letters (67 % of individuals) fell significantly between 2014 and 2016 (-23 percentage points), while the percentage of individuals who received parcels (22 %) remained the same.

Graph 8 – Receipt of mail in the last 12 months



Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2016

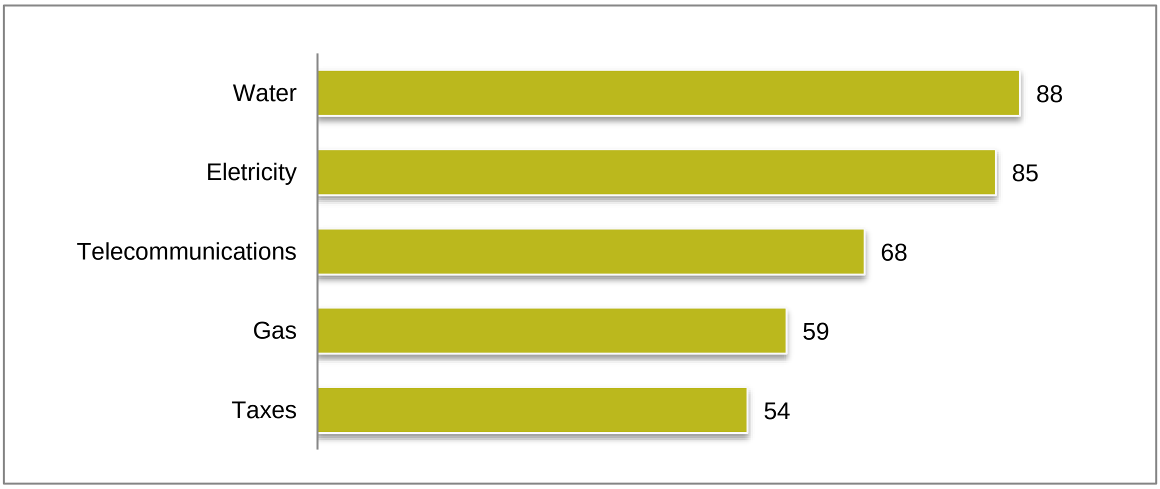
Base: Individuals aged 15 years or over (excludes non-responses)

Note: All estimates are reliable. The upward pointing arrow signals a statistically significant increase between 2014 and 2016, and the downward pointing arrow signals a statistically significant decline.

The respondents received an estimated 4 letters and around 2 parcels in October 2016[8].

Most people receive water, electricity and telecommunications bills by physical mail (88, 85 and 68 %).

Graph 9 – Bills usually received by physical mail



Unit: %

Source: ANACOM, Survey on the Use of Postal Services, 2016

Base: Individuals aged 15 years or over.

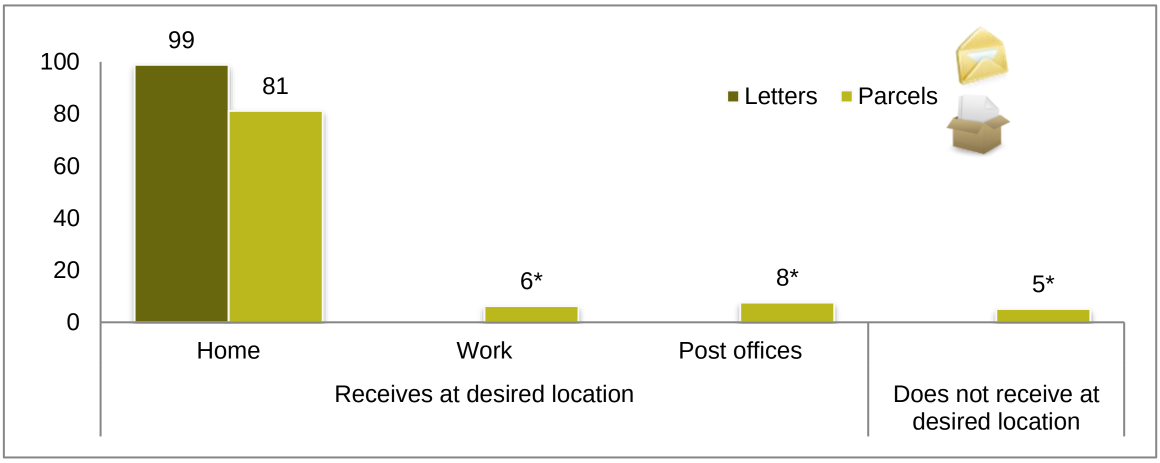
Note: All estimates presented are reliable.

[8] This is the average number of letters / parcels the respondents estimated reckoned they received.

Location for receiving mail

Most letters and parcels were received at home (99 and 82 %, respectively). 99 % of letters recipients and 95 % of parcels recipients consider the delivery location to be appropriate.

Graph 10 – Actual / desired location for receiving letters and parcels



Unit: %.

Source: ANACOM, Survey on the Use of Postal Services, 2016

Base: Individuals aged 15 or over who received correspondence or parcels bearing their name in 2016

Note: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

Delivery frequency

Around 62 % of respondents receiving letters or parcels have the perception that post is delivered in their area of residence on a daily basis (-25.2 % than in 2014) and 34 % have the perception that post is delivered every 2 days.

The analysis of the perception vs. the need of delivery regularity shows that:

- 82.5 % of respondents consider that the perceived regularity of mail delivery meets their needs;
- 8.5 % of respondents consider that the perceived regularity of mail delivery does not satisfy their needs (particularly those who receive mail every 2 days and have a daily need); These were also the respondents with the lowest average satisfaction level regarding the regularity of mail delivery (7.7 on a scale of 1 to 10);
- 9% of respondents consider that the perceived regularity of delivery is better than what is necessary (from 5.2 % in 2014 to 9 % in 2016).

Table 4 – Perception/needs regarding the regularity of the delivery of letters/parcels

		2014	2016	
		%	%	Average satisfaction with regularity
Perception equals need		**86.5**	**82.5 ↓**	**8.5**
of whom	Perception = Need: every day	81.2	55.6 ↓	8.6
	Perception = Need: every 2 days	5.1*	25.8 ↑	8.4
Perception below need		**8.4***	**8.5***	**7.7**
of whom	Perception: every 2 days < Need: every day	5.5*	5.9*	7.8
	Perception: 3 every 3 days < Need: every 2 days	1.5*	1.9*	7.9
Perception higher than need		**5.2***	**9.0* ↑**	**8.4**
of whom	Perception: every day > Need: every 2 days	3.3*	4.3*	8.6
Total		100	100	8.4

Unit: %, Scale 1 (very dissatisfied) to 10 (very satisfied)

Source: ANACOM, Survey on the Use of Postal Services, 2014 and 2016

Base: Individuals aged 15 or over who received letters or parcels bearing their own name in the last 12 months (excludes non-responses)

Note 1: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate. An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

Note 2: The shaded averages show those that are significantly different (in column) according to the test of equality of averages. The light shades highlight the higher averages and the dark shades highlight the lower averages.

V. Parcels and e-commerce

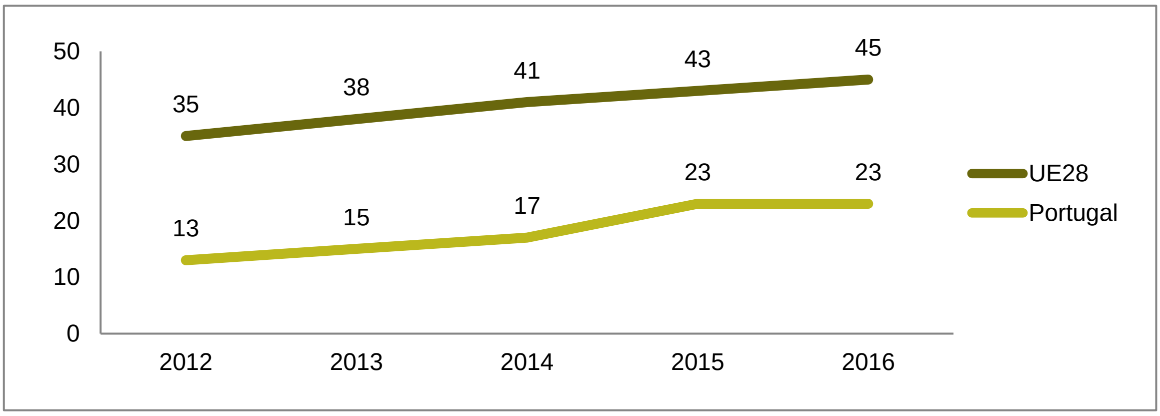
Chapter V summarises the results of the Survey on the Use of Information and Communication Technologies in Households (IUTICF) regarding e-commerce, which supplement the information collected by the survey on the use of postal services.

E-commerce is a new business opportunity for postal service providers, particularly in the area of parcel distribution.

Online purchases/orders

According to the European Commission[9], in the first quarter of 2016, 23 % of residents in Portugal had made online purchases or orders in the previous 3 months[10] (6 percentage points more than in 2014 and 22 percentage points below the EU average, with Portugal in 23rd place of the ranking).

Graph 11 – Percentage of individuals who made online purchases or orders in the last 3 months



Unit: %.

Source: Eurostat, European ICT survey: "Information and Communication Technologies in households and by individuals" (2012 to 2016); Data collected during the first quarter of the year.

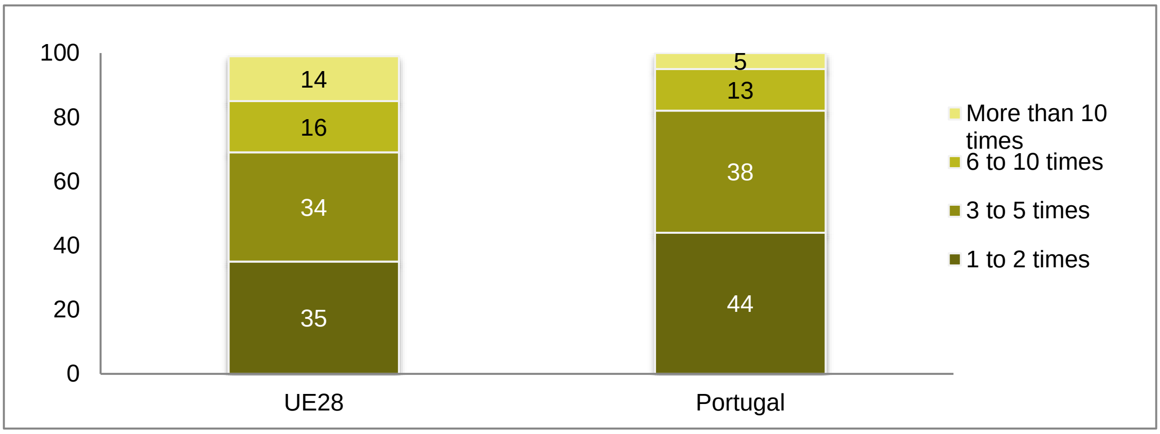
Base: Individuals aged 16 to 74.

Also the number of purchases/orders made online places Portugal below the EU28 average.

[9] Survey on the Use of Information and communication Technologies in Households (IUTICF) conducted by the EU states national statistical institutes and harmonised and compiled by Eurostat. The population consists of households resident in Portugal with at least one individual aged between 16 and 74. The sample size was 7,642 households. The reference period of the information was the time of the interview for data on households, and the first quarter of 2016 for data on individuals. The sample was stratified by NUTS II and designed in order to produce representative estimates for mainland Portugal and for the Autonomous Regions of the Azores and Madeira.

[10] Orders made through a website or Internet apps were considered. It includes participation in lotteries and betting (such as Santa Casa games), the acquisition of financial investments (such as shares), accommodation reservations, and purchases through Internet auctions). It does not include orders made by e-mail, SMS or MMS; products or services obtained for free, and orders for professional purposes. The interviewees were asked: "*Have you ever made purchases or orders via the Internet? When did you make your last purchase or order?*".

Graph 12 – Number of online purchases/orders in the last 3 months



Unit: %.

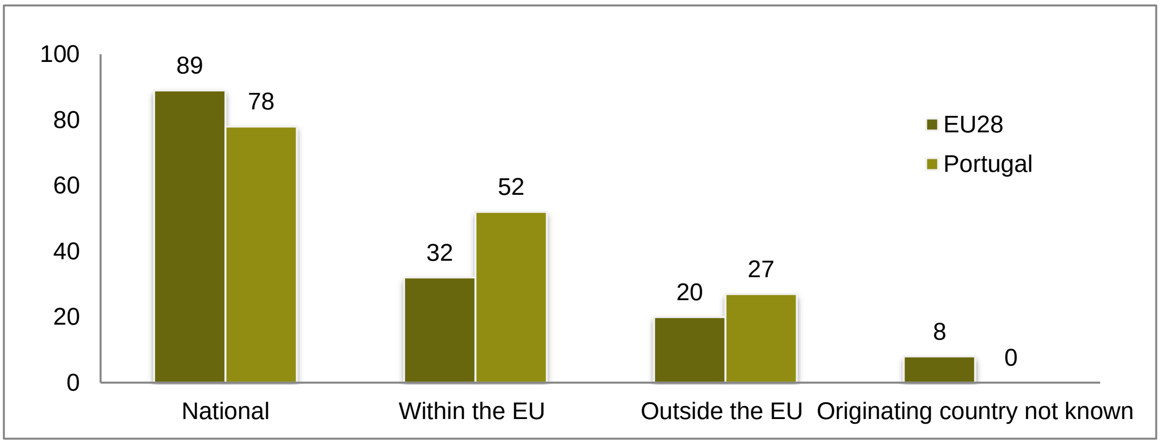
Source: Eurostat, European ICT survey: "Information and Communication Technologies in households and by individuals" (2016); Data collected in first quarter of 2016.

Base: Individuals aged 16 to 74 who made online purchases/orders in the last 3 months

Origin of purchases/orders made online

Most people stated that at least one of the purchases made online in the last 12 months originated in Portugal (78 %); half mentioned an EU country, and 27 % a country outside the EU. Portugal stands above the EU28 average when the country of origin of the purchase/order was inside or outside the EU.

Graph 13 – Country of origin of purchases/orders made online in the last 12 months



Unit: %.

Source: Eurostat, European ICT survey: "Information and Communication Technologies in households and by individuals" (2016); Data collection made during the first quarter of 2016.

Base: Individuals aged between 16 and 74 who made online purchases/orders in the last 12 months

Data from the survey on the use of postal services make it possible to identify that the main European countries mentioned by the individuals surveyed as the origin of the purchase or orders made online were Spain (27 percent, +14 percentage points than in 2014) and the United Kingdom (19 percent, +8 percentage points).

Track & Trace

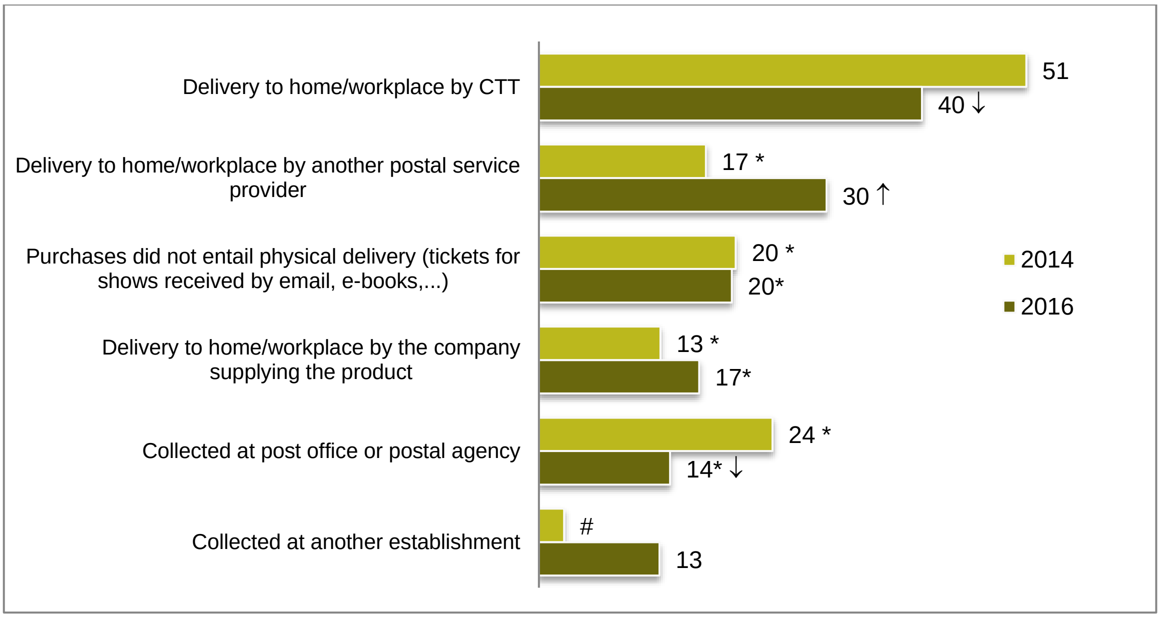
Around 51.5 % of respondents who received orders in the past 12 months were aware of the existence of online tools to track and trace the orders, and 36 % used them.

Providers

The majority of respondents indicated that at least one of the purchases made online was delivered to their home or workplace by CTT (40 % percent, -11 percentage points than in 2014), by another provider of postal services (30 % percent, +12 percentage points than in 2014) or by the company where the purchase was made (17 %). Around 20 % reported making online purchases that did not entail physical delivery (tickets for shows, e-books, etc.).

About 14 % of respondents collected at least one of their online purchases at post offices/postal agencies (in 2014 the figure was 24 %).

Graph 14 – Means of delivery of online purchases



Source: ANACOM, Survey on the Use of Postal Services, December 2014 and 2016

Base: Individuals who made online purchases

Note 1: Meaning of estimate symbols: (#) Unreliable estimate; (*) Acceptable estimate; (no symbol) Reliable estimate.

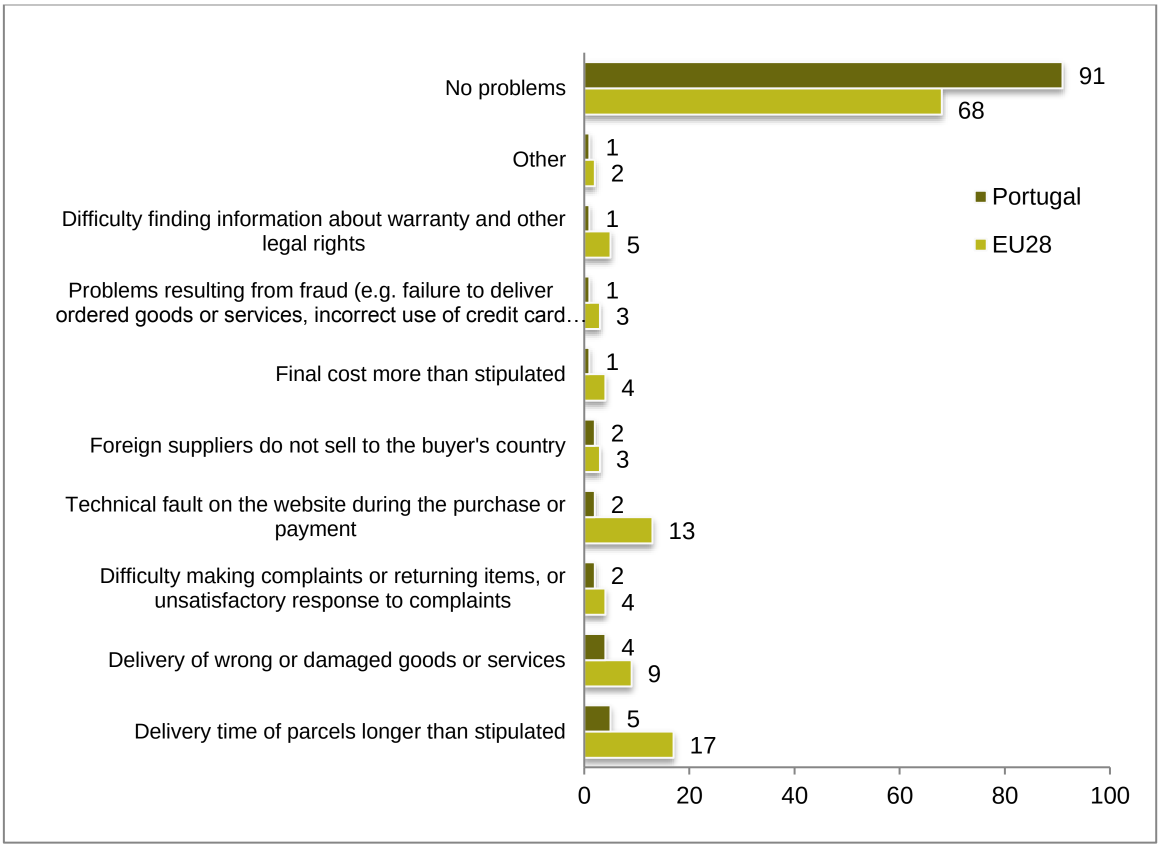
Note 2: Multiple choice question

Note 3: An upward pointing arrow signals a statistically significant increase between t-1 and t, and a downward pointing arrow signals a statistically significant decline.

Difficulties related to online purchases

According to the European Commission over 90 % of respondents who made online purchases had no problems (+23 percentage points than the EU28 average). Nonetheless, the problem most often mentioned in Portugal and in the EU28 was "delivery time of orders longer than stipulated".

Graph 15 – Problems faced when making purchases via the Internet, Portugal and EU28



Unit: %.

Source: Eurostat, European ICT survey: "Information and Communication Technologies in households and by individuals" (2016); Data collected in first quarter of 2016.

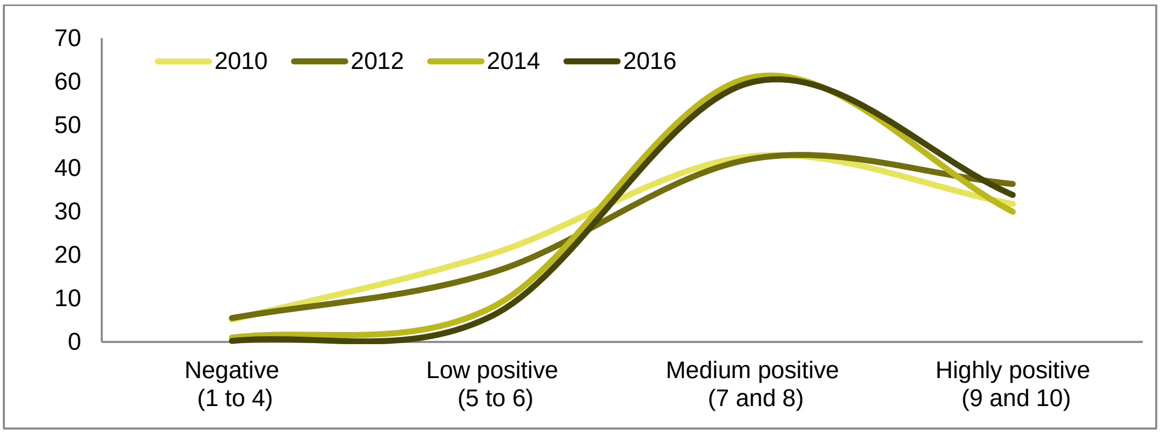
Base: Individuals aged 16 to 74 who made purchases via the Internet for private use in the last 12 months

VI. Evolution of postal services in 2016

Respondents expressed satisfaction with respect to the general evolution of postal services during 2016.

Compared to 2014, there was a significant decline in the number of respondents who gave a negative evaluation (up to 4 points), with a significant increase of respondents with a highly positive evaluation (between 9 and 10 points).

Graph 16 – Evaluation of the evolution of postal services



Unit: %.

Source: ANACOM, Survey on the Use of Postal Services, December 2010, 2012, 2014 and 2016

Base: Individuals aged 15 years or over (excludes non-responses)

Annex – Notes on methodology

The population defined for the Survey on the Use of Postal Services was made up of individuals aged 15 or over, residing in mainland Portugal, in the Autonomous Region of Madeira, or in the Autonomous Region of the Azores. Quota sampling was used to select the interviewees, bearing in mind gender, age, education level and occupational status, while households were previously selected by region and family size.

The table below details the characteristics of the surveys referenced in the body of this report:

	Associated company	Survey method	Fieldwork	Sample size	Maximum margin of error[(1)]
Nov. 2016	Nielsen	Telephone (CATI)	2 to 15 Nov. 2016	1,340 interviews	2.68
Dec. 2014	Nielsen	Telephone (CATI)	3 Nov. to 3 Dec. 2014	1,340 interviews	2.68
Dec. 2012	GFK-Metris	Telephone (CATI)	8 Nov. to 15 Dec. 2012	1,374 interviews	2.64

[(1)] Absolute error margin or absolute precision (semi-range of a 95 % confidence interval for a proportion) for questions directed at entire sample.

The results were rebalanced for the sample population using weighting factors. The weighting factor was created to ensure that results reflected the socio-demographic structure of the Portuguese population aged 15 years old or over residing in private households in Portugal. This process was based on the Census most recently conducted by INE (Statistics Portugal) prior to the fieldwork being carried out.