

Survey on the Use of Postal Services - January 2006

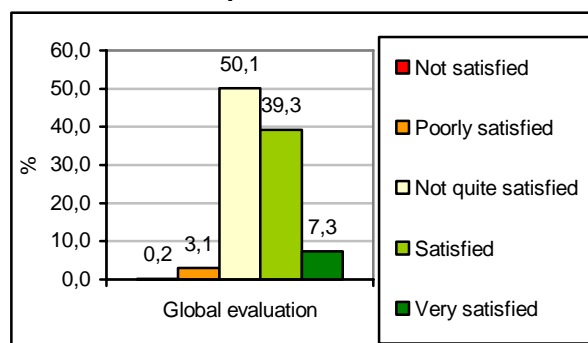
- Main results -

Postal services: level of use and service's quality perception levels

1. Almost half the users of postal services in Portugal (about 46.6%) are '*satisfied*' or '*very satisfied*' with the evolution of the quality of service of posts in the last twelve months.

Only 3.1% of inquired users are '*not satisfied*' with the evolution of the quality of posts.

Graph 1 - Perception of the evolution of quality of service of posts in the last 12 months



Source: Survey on the use of postal services - Jan 2006

2. **Normal mail** is the most used postal service. About 68 per cent of those interviewed use this service. It is followed by **priority mail**, which is used by 57.4 per cent of those interviewed.

The rate of **registered mail** and **mail orders** users is quite low.

Table 1 – Use of postal services

Normal Mail	67.9%
Blue (Priority) Mail	57.4%
Registered Mail	28.0%
Mail orders	20.4%
Postal orders and invoicing	14.7%
Express Mail	7.2%
Green Mail	7.6%
Economic Mail	0.7%
Documents exchange	0.3%
Centres	
None	6.8%
Nr/Na	-

Source: Survey on the use of postal services - Jan 2006

3. According to the survey, each interviewed person receives per month 14.7 "*letters, direct mail*" and 1 mail order.

Table 2 - Postal objects received per month, at the home of the interviewed person

Letters, addressed advertising, etc.	14.7
Received mail orders	1

Source: Survey on the use of postal services - Jan 2006

4. Most of those interviewed say that **mail delivery in their area is made on a daily basis**, regardless of their area.

Table 3 – How regular is mail delivery at your area, by Nuts

	North	Centre	Lisbon	Alen- tejo	Algar- ve	Azo- res	Ma- deira	Total
Every day	97.5%	100.0 %	99.2%	98.5%	97.0%	100.0 %	94.7%	98.6%
Every two days	2.5%	0.0%	0.4%	1.5%	3.0%	0.0%	5.3%	1.3%
Longer	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%

Source: Survey on the use of postal services - Jan 2006

5. The “*no non-addressed advertising here, please*” sticker is placed on 15.9% of mail boxes, 3.6 per cent more than in June 2005. The sticker is respected in 53.9% of the cases.

Table 4 - "Non-Addressed Advertising " Sticker

	Has sticker		Sticker respected	
	2006	2005	2006	2005
Yes	15.9%	12.3%	53.9%	49.3%
No	81.6%	85.8%	38.6%	44.0%
Nr/Na	2.5%	1.9%	7.5%	6.7%

Source: Survey on the use of postal services - Jan 2006 and Jun 2005

Post offices and postal agencies

6. In **post offices**, '*sending normal correspondence*' is the most used service (86.4 per cent). Sending packages is made by 17.6% of those interviewed.

Table 5 - Knowledge and use of services at post offices

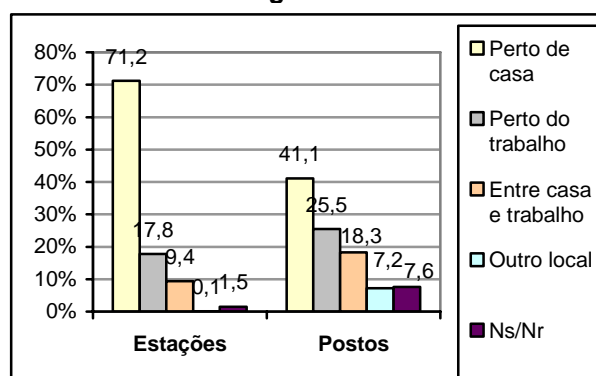
Sending correspondence (normal, priority, ...)	86.4%
Sending mail orders	17.6%
Payment of services	23.1%
Receiving registered mail	21.3%
Buying stamps	20.6%
Using the phone	9.8%
Receiving mail orders	14.9%
Postal orders	10.4%
Postal invoicing	6.2%
Mail boxes	1.3%
Payment of taxes	3.8%
Charging mobile phones	4.5%
Buying transportation tickets	2.5%
Corfax	0.9%
Internet access	0.5%

Source: Survey on the use of postal services - Jan 2006

7. Post offices are used mainly 'close to home' (71.2 per cent)

Postal agencies have a more dispersed use, with 41.1% using them close to home and 25.5% 'close to work'.

Graph 2 - Location of post offices and postal agencies



Source: Survey on the use of postal services - Jan 2006

8. The three most important items in post offices are 'efficiency of staff' (23.6 per cent) followed by 'time waiting to be attended' (21.4%) and 'opening hours' (19.5%).

In postal agencies efficiency is also the most important item (21.1%) but 'location' and 'opening hours' are ahead of 'time waiting to be attended', which is one of the main items in post offices.

Table 6 - Most important aspects in post offices

Efficiency of staff	23.6%
Time waiting to be attended	21.4%
Opening hours	19.5%
Location	12.8%
Organization of the attending lines	12%
Accessibility for persons with special needs	8.9%
Displayed information	1.8%

Source: Survey on the use of postal services - Jan 2006

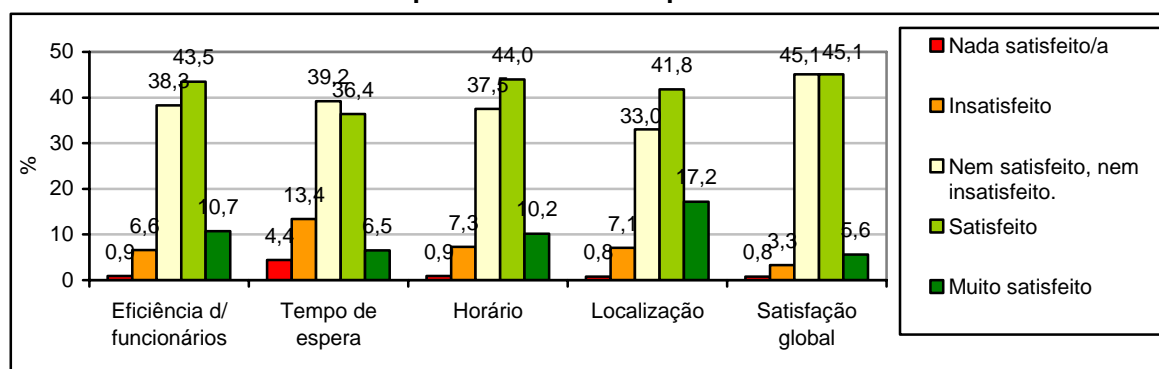
Table 7 - Most important aspects in postal agencies

Efficiency of staff	21.1%
Time waiting to be attended	20.5%
Opening hours	19.7%
Location	18.4%
Organization of the attending lines	11.0%
Accessibility for persons with special needs	7.0%
Displayed information	2.4%

Source: Survey on the use of postal services - Jan 2006

9. The **waiting time is the item that mostly leads to lack of satisfaction** within the users of post offices. About 17.8% of those interviewed say that they are *'poorly satisfied'* or *'not satisfied'* with the waiting time at post offices.

Graph 3 - Evaluation of post offices



Source: Survey on the use of postal services - Jan 2006

It should be noted that, according to the collected data, 54.6% of those interviewed **wait 10 minutes or less in post offices**. This rate rises to 61% in postal agencies.

The average waiting time is 15 minutes in post offices and 12 minutes in postal agencies.

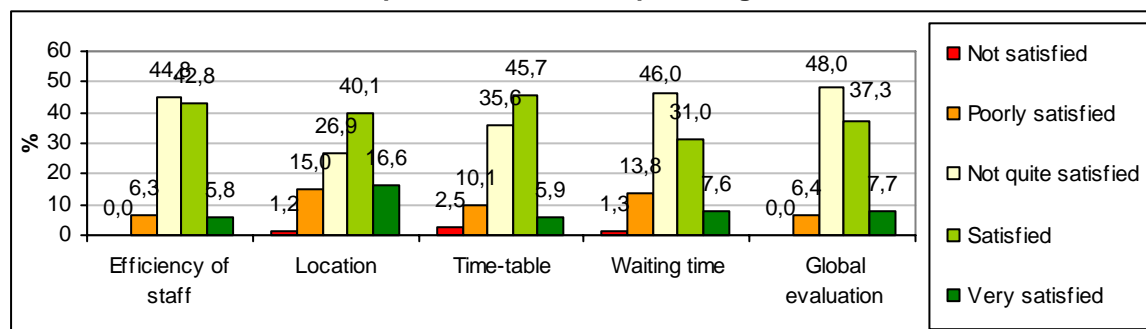
Table 8 - Average waiting time in post offices and postal stations

	Offices	Agencies
<10 minutes	21.6%	31.9%
10 minutes	33.0%	29.1%
>10 minutes	44.4%	30.3%
Average time	15 minutes	12 minutes

Source: Survey on the use of postal services - Jan 2006

10. In postal agencies *'location'* is the reason behind most non-satisfaction, with 16.2% of users *'poorly satisfied'* or *'not satisfied'*.

Graph 4 - Evaluation of postal agencies



Source: Survey on the use of postal services - Jan 2006

11. The replacement of some post offices by postal agencies is known by 36.2% of those interviewed, 17.1 per cent more than in June 2005.

Of those stating to be aware of the replacement, 47.3% consider that the quality level of the public service has decreased.

Table 9 - Replacement of some post offices by postal agencies managed by municipalities

	Jan 2006	Jun 2005
Is aware	36.2%	19.1%
Does not know	61.8%	71.7%
NR/NA	2.0%	9.2%
Quality was kept	32.4%	28.7%
Not kept	47.3%	41.1%
NR/NA	20.3%	30.1%

Source: Survey on the use of postal services - Jan 2006 and Jun 2005

Complaints

12. 9.7% of those interviewed have already filed a **complaint at post offices**.

The main reasons for complaint were '*delivery at wrong address*' and '*delay in delivery*'. 11% complained about '*loss of object*'.

The **average answering time to the complaint** fell from 11 to six days, from June 2005 to January 2006.

Table 10 - Complaints, reasons and waiting time.

	Jan 2006	Jun 2005
Complaints:	9.7%	6.7%
Reason:		
Delivery at wrong address	33.4%	41.7%
Delay in delivery	31.6%	22.2%
Loss of object	11.0%	16.7%
Misunderstanding with the mail person	8.6%	8.3%
Poor state of the object	1.2%	5.6%
Other	9.4%	6.9%
NR/NA	4.9%	-
Time waiting for answer:	6 days	11 days

Source: Survey on the use of postal services - Jan 2006 and Jun 2005

Comparisons between operators

3. CTT Expresso/Post Log stands in **first place for awareness**. 55.4% of those interviewed recognised this company from the list of operators provided by the interviewer.

It is followed by DHL with 48.3 per cent of awareness.

CTT Expresso/Postlog also stands out on use, with 11.2 per cent.

Table 11 - Awareness and use of express mail operators.

	Awareness	Use
CTT Expresso/Post Log	55.4%	11.2%
DHL	48.3%	6.5%
TNT	30.3%	1.8%
Chronopost	24.6%	3.8%
UPS	20.6%	1.3%
FED EX/Rangel Expresso	11.8%	1.0%
Ibercourier/MRW	7.3%	0.2%
GL Transportes/Guipuzcoana	7.2%	0.7%
Logistas Transportes e Transitários	5.9%	0.9%
None	24.4%	79.6%
NR/NA	1.3%	2.3%

Source: Survey on the use of postal services - Jan 2006

Postal services and new information and communications technologies

14. The survey showed that **those using the Internet receive in average one more mail orders per month** than non users. Regarding letters (normal, express and priority mail), the difference is only 1 object.

Table 12 - Monthly average of received letters and mail orders and of Internet use

	Letters	Mail orders
Does not use Internet	14.4	0.7
Uses Internet	15.4	1.8

Source: Survey on the use of postal services - Jan 2006

Methodology:

The universe defined for this survey was made up of users of at least one postal service in Mainland Portugal and in the autonomous regions of Madeira and the Azores.

The sample size was defined in order to assure a maximum error of 3.5% for the main results (for a confidence level of 95%).

The sample was stratified by NUTS II based on the last General Population Census: 2001 Census.

920 face-to-face and direct interviews were made. Later, a telephone collection (CATI) of 320 observations was made to assess the usage rate of postal services.

The field work took place between 9 and 26 January and was carried out by Consulmark