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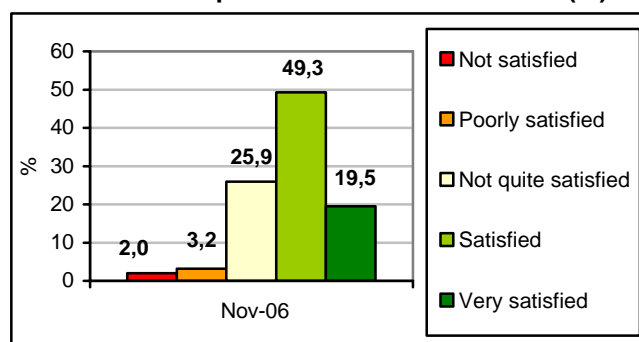
Survey on the Use of Postal Services - November 2006

- Main results -

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

1. **68.8 per cent of the users of postal services are “satisfied” or “very satisfied”** with the evolution of the quality of posts in the last 12 months.

Graph 1 – Perception of the evolution of the quality of service of posts in the last 12 months (%)



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

2. **Blue (Priority) mail is the most used service – 47.5 per cent** of those interviewed used this service in the last 12 months.

Normal mail comes in second as the most used service by residential customers, with 44.1 per cent of the answers.

Table 1 – Use of postal services in the last year (%)

Normal Mail	44.1
Blue (Priority) Mail	47.5
Registered Mail	23.8
Mail orders	14.3
Postal orders and invoicing	9.6
Express Mail	4.4
Green Mail	10.2

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

3. Lower social classes (D and E) are the ones where not using postal services is more frequent.

Table 2 – Use of at least one postal service per year, per social status (%)

	Used	Did not use
A Status	85.1	14.9
B Status	87.1	12.9
C Status	87.5	12.5
D Status	70.0	30.0
E Status	67.1	32.9

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

4. According to the collected data, each interviewed person receives per month 14.9 "letters and addressed mail" and 0.9 mail orders.

Table 3 – Postal receptions, per month, at the home of the interviewed person

	Jan-06	Nov-06
Letters, direct mail, etc.	14.7	14.9
Received mail orders	1.0	0.9

Source: Survey on the use of postal services – January and November 2006

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

Table 4 - How regular is mail delivery at your area, by NUTS (%)

	North	Centre	Lisbon	Alentejo	Algarve	Azores	Madeira	Portugal
Every day	94.8	99.0	88.4	96.5	93.8	93.3	93.8	94.0
Every two days	2.4	0.5	4.9	1.8	3.1	0.0	6.3	2.7
Every three days	2.4	0.0	2.2	0.0	3.1	0.0	0.0	1.5
More than 4 days	0.4	0.5	0.9	0.0	0.0	0.0	0.0	0.5

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

6. The *Non-addressed advertising here, please* sticker is placed on 14.8 per cent of mail boxes. The sticker is respected in 51.7 per cent of the cases.

Both figures are slightly below those registered in the Survey of January 2006.

Table 5 - "Non-addressed advertising" sticker (%)

	Jan-06	Nov-06
Has sticker	15.9	14.8
Sticker respected	53.9	51.7

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

Post offices and postal agencies

7. **"Sending correspondence" is the most frequently used service in post offices**, according to 59.9 per cent of those interviewed.

"Payment of services" is the second most used service in post offices (28.6 per cent of the answers).

Table 6 – Frequency of use of services in post offices (%)

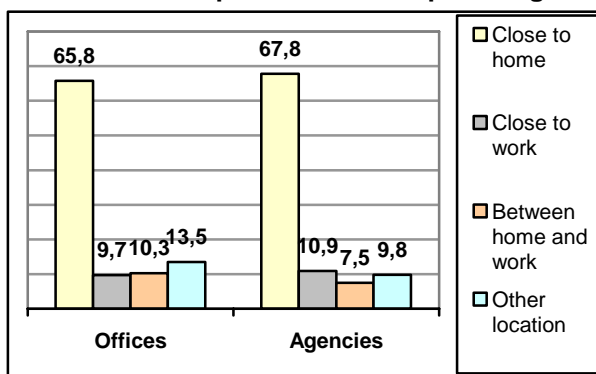
Sending correspondence (normal, priority, ...)	59.9
Payment of services	28.6
Sending mail orders	21.0
Receiving mail orders	14.9
Buying stamps	11.4
Receiving registered mail	9.5
Postal orders	6.2
Buying and selling savings certificates	3.9
Receiving pension funds	3.3
Charging mobile phones	2.9
Payment of taxes	2.5
Using the telephone	2.1
Postal invoicing	2.1
Corfax	1.3
Buying books	1.0
Buying transportation tickets	0.7
Post office boxes	0.2
Internet access	0.0

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

8. **Post offices are used mainly "close to home"** (65.8 per cent).

The same goes for postal agencies.

Graph 2 - Location of post offices and postal agencies (%)



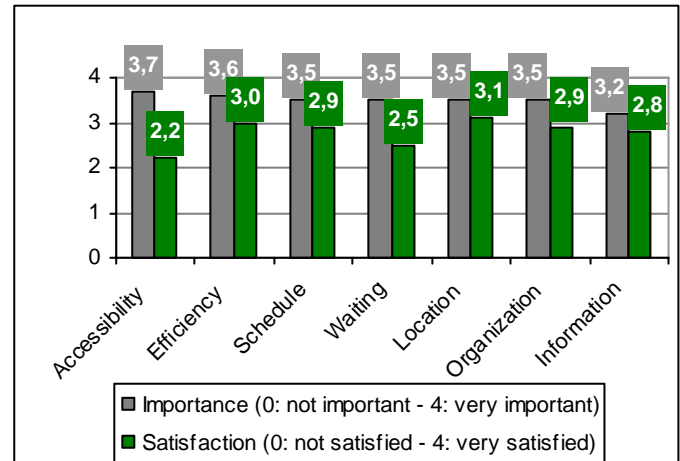
Source: Survey on the use of postal services - November 2006

9. The most important item in post offices is “*accessibility for people with special needs*”, with 3.7 per cent. This is also the item with the lowest rate in terms of satisfaction, with 2.2 per cent.

“*Waiting time*”, an item that was considered important, was also considerably low rated, with 2.5 per cent.

“*Efficiency of staff*” and “*location of posts*” have the best ratings, with 3 and 3.1 per cent, respectively.

Graph 3 – Most important items in post offices and evaluation



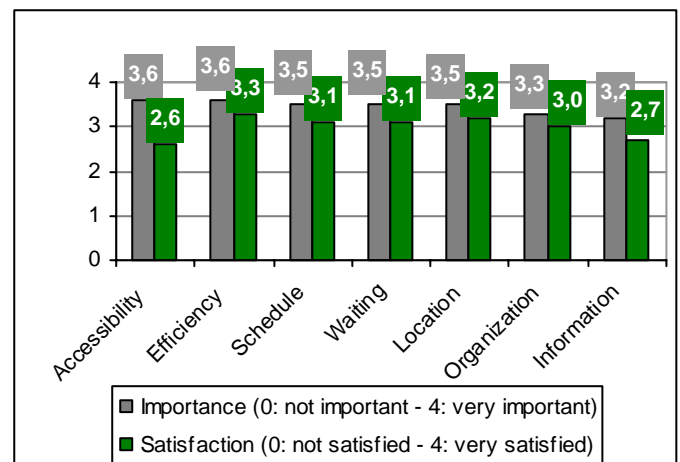
Source: Survey on the use of postal services - November 2006

10. Satisfaction regarding the several items of postal agencies is, in general, higher than that of post offices.

Highlight goes to the satisfaction towards “*waiting time*”, which is 0.6 per cent above that of post offices.

“*Displayed information*” is the sole item with a slightly lower rating for post offices.

Graph 4 – Most important items in post agencies and satisfaction



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

11. The “*average waiting time*” perceived by users in post offices and postal agencies reached 13 and 9 minutes, respectively.

Table 7 - Average waiting time in post offices and postal agencies (minutes)

	Nov-06
Post office	13
Postal agencies	9

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

12. The replacement of some post offices by postal agencies is known by 38.4 per cent of those interviewed.

Of those using postal agencies, 40.1 per cent consider that the level of quality of the service was kept.

Table 8 - Replacement of some post offices by postal agencies managed by municipalities (%)

	Nov-06
Is aware	38.4
Does not know	60.7
NR/NA	0.9
Quality was kept	40.1
Not kept	29.1
NR/NA	30.8

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

Complaints

13. About 8 per cent of those interviewed have already filed a complaint at post offices.

The reason “delay in delivery” continues to be the main reason for complaint for 33.3 per cent of those filing complaints.

The **average answering time to the complaint** is 15 days.

However, 50 per cent of those filing complaints had the issue solved in 2 days or less.

Table 9 – Reasons for Complaints (%)

	Nov-06
Filed a complaint:	8.0
Reasons:	
Delivery at wrong address	17.5
Delay in delivery	33.3
Loss of object	15.9
Misunderstanding with the mail person	9.5
Poor state of the object	0.0
Mail person does not ring to deliver registered mail	7.8
Advertising in the mail box	6.3
Other	19.0
NR/NA	1.6

Source: Survey on the use of postal services – January 2006 and November 2006

Table 10 – Time waiting for answer (days)

	Nov-06
Time (days):	15
Percentile 50	2
Percentile 75	21

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

Comparisons between operators

14. In general, there was an **increase in the use of express mail providers.**

CTT Expresso / PostLog is the operator with the highest usage rate, with 13.5 per cent, followed by DHL, with 9.4 per cent.

Table 11 – Use of express mail operators (%)

	Jan-06	Nov-06
CTT Expresso /PostLog	11.2	13.5
DHL	6.5	9.4
Chronopost	3.8	5.2
UPS	1.3	2.7
TNT	1.8	1.9
FED EX/Rangel Expresso	1.0	1.2
Logistas Transp. e Transitários	0.9	0.8
GL Transportes/ Guipuzcoana	0.7	0.1
Ibercourier/MRW	0.2	0.5
Nenhum	79.6	73.5
Ns/Nr	2.3	0.8

Source: Survey on the use of postal services – January 2006 and November 2006

Postal services and new information and communication technologies

15. Internet users receive, on average, a higher number of letters.

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

	Letters	Mail orders
Does not use Internet	10.3	0.6
Uses Internet	18.7	1.1

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

16. E-mail users also send more postal objects per year than non e-mail users.

Table 13 – Sendings in the last 12 months, by e-mail use

	Does not use e-mail	Uses e-mail	Average
Normal mail	9.2	15.9	14.3
Blue mail	6.9	9.5	8.8
Express mail	3.3	1.9	2.1
Green mail	9.2	7.9	8.1
Mail orders	4.0	5.0	4.7

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

Methodology:

Survey of January 2006

The universe defined for this survey was made up of users of postal services living in Portugal (Mainland and in the Autonomous Regions).

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 among the population. The field work took place between 9 and 26 January and was carried out by Consulmark.

Survey of November 2006

The Universe was made up of 15 years or older individuals, living in Portugal (Mainland and in the Autonomous Regions).

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.

The field work took place between 2 and 15 November 2006 and was carried out by Metris GFK. 1000 (CATI) telephone interviews were made.