



Postal Service Residential Survey 2009

**As Commissioned by
The Commission for
Communications Regulation**

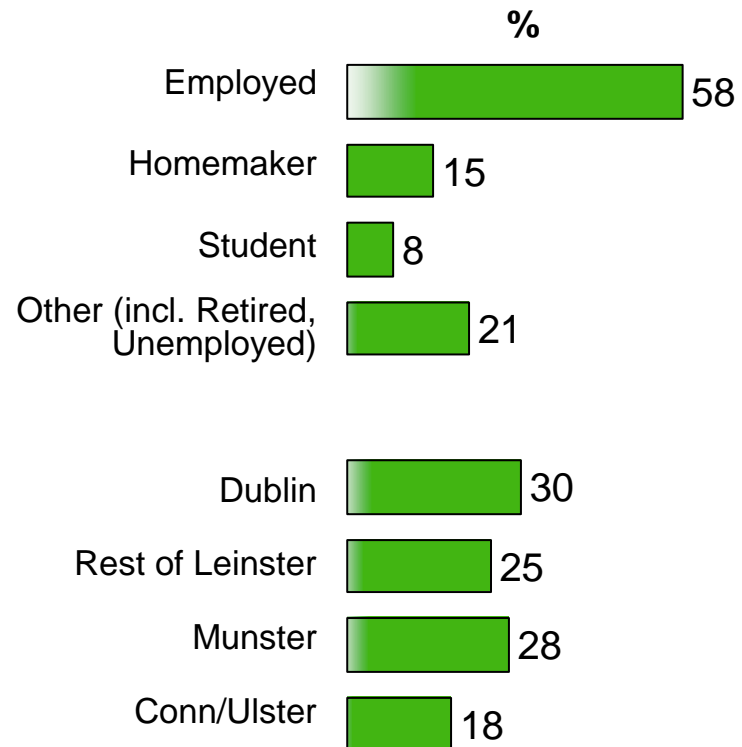
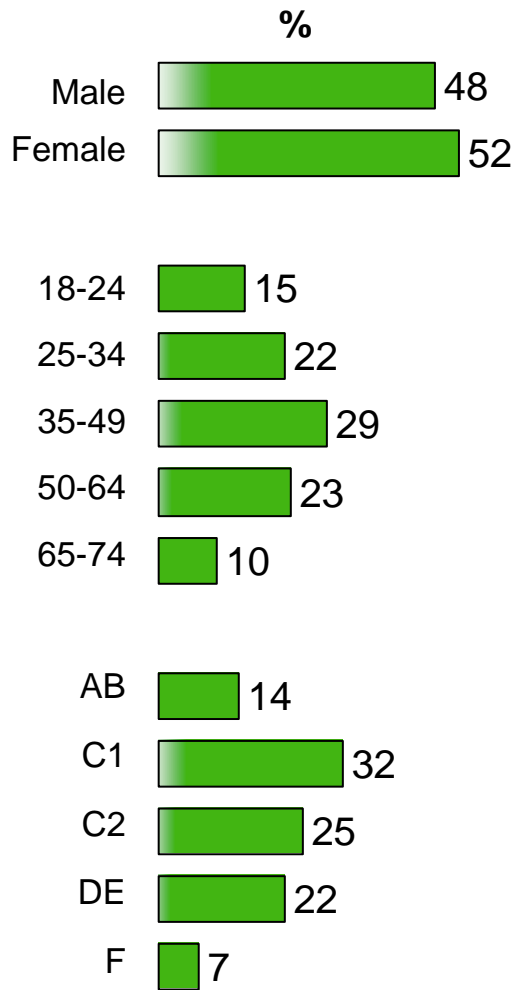


17th December 2009

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- Attitude to Postal Service
- Postal Complaints
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- The following report is based upon research conducted by Millward Brown Lansdowne among a nationally representative sample of adults aged 18-74 throughout Ireland.
- The survey was conducted face to face, in home, between August and October 2009, with interlocking quotas set on gender and age, and non interlocking quotas set on region and social class.
- In total 1,010 adults were interviewed.
- Data has been weighted in order to reflect the exact demographic profile of the Republic of Ireland.
- Where possible, comparisons with previous research has been included.
- The margin of error of this survey is estimated to be +/- 3%.

Analysis of Sample



Mail Delivered

Amount of Post Delivered Per Week#

Q. Can you tell me the TOTAL number of items of mail delivered to all persons resident in your household at this address each week by all postal service providers?

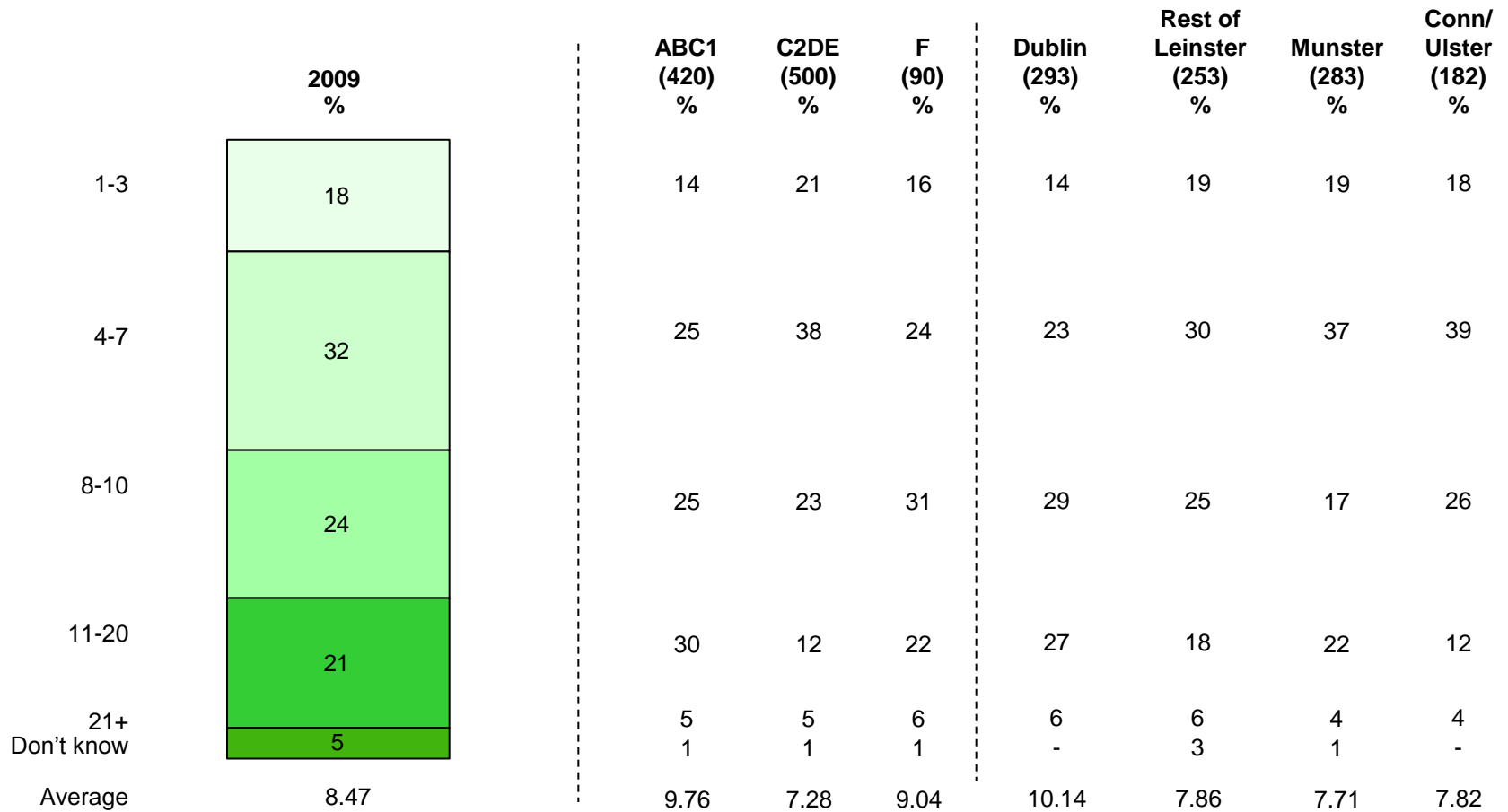
	2007 %	2008 %	2009 %
1-3	14	17	18
4-7	28	29	32
8-10	23	23	24
11-20	20	22	20
21+	5	6	5
Don't know	10	3	
Average	9.02	9.40	8.47

- There has been a decrease in the volumes of mail delivered to households during 2009.
- In terms of region, Dublin residents (10.14 items per week) had most mail delivered, with those living in Munster claiming the least amount (7.71 items a week).
- Those within the ABC1 category have most mail delivered (9.76 items).
- Online shoppers have significantly higher amounts of mail delivered, averaging 9.35 items per week.

#Note: In 2008 and 2009, clarification was given that items delivered excluded leaflets drops and flyers

Amount of Post Delivered Per Week#

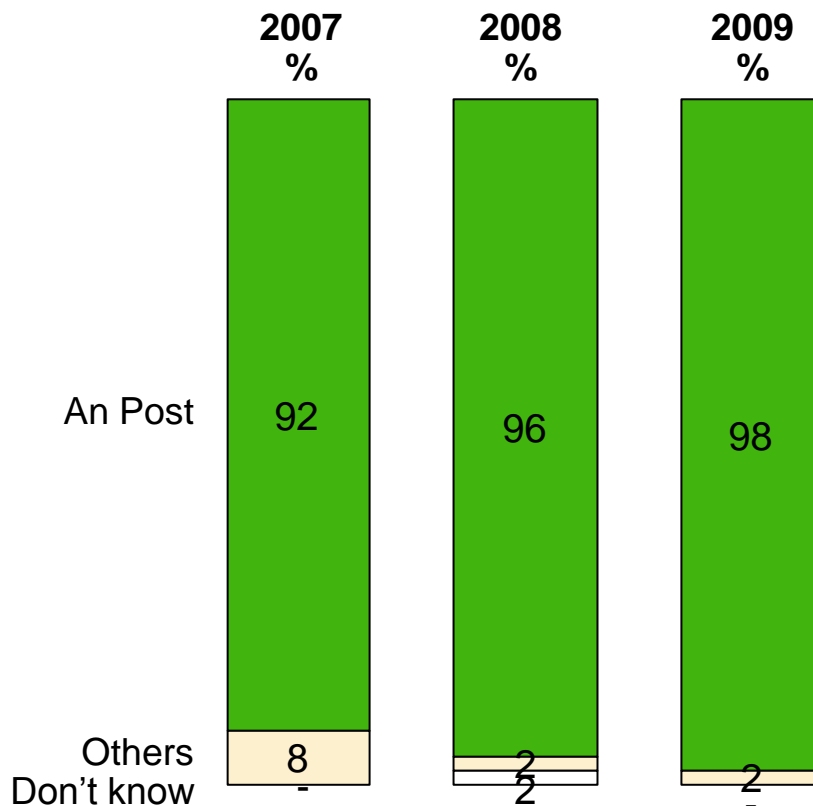
Q. Can you tell me the TOTAL number of items of mail delivered to all persons resident in your household at this address each week by all postal service providers?



#Note: In 2008 and 2009, clarification was given that items delivered excluded leaflets drops and flyers

Percentage of Mail Delivered by Other Postal Service Providers

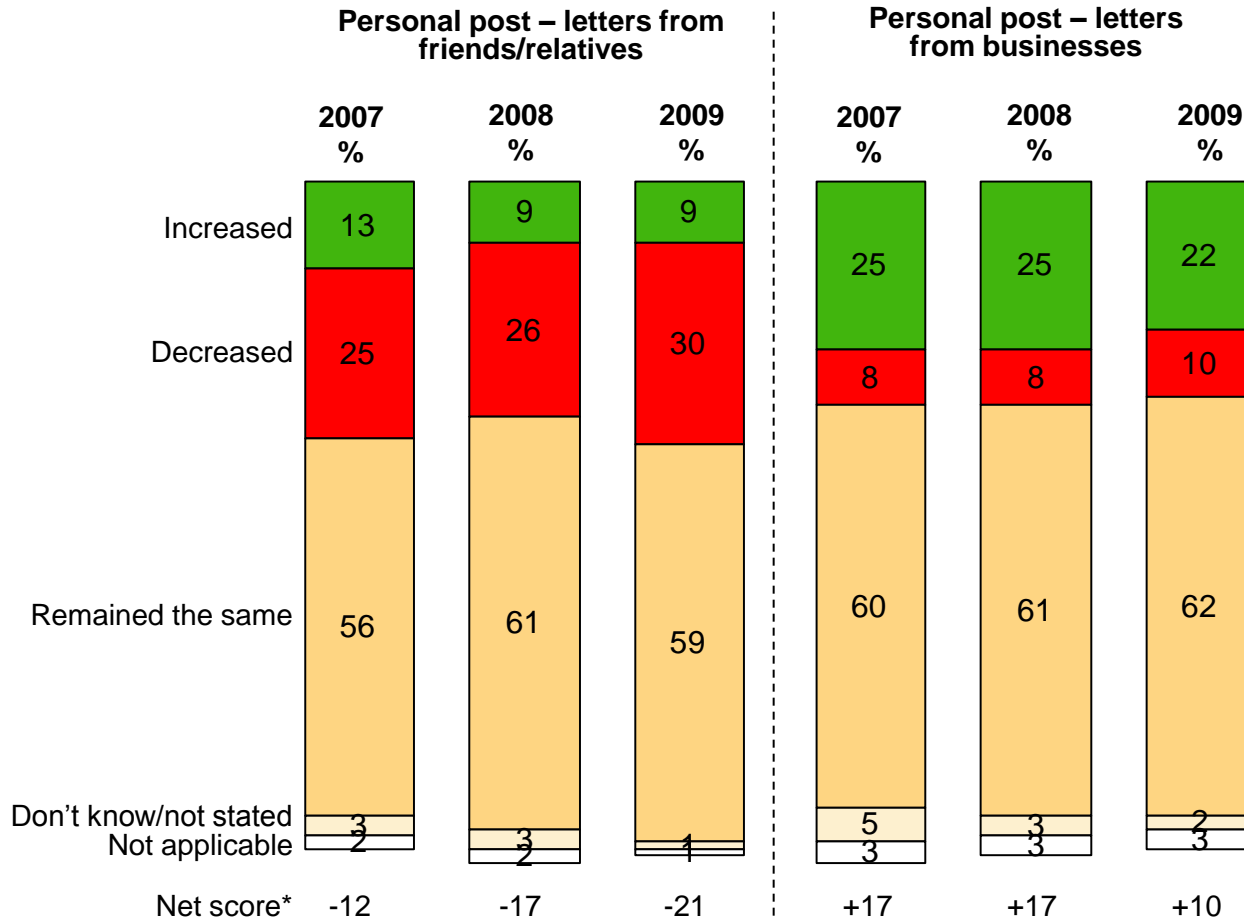
Q. Of the weekly number of items of mail delivered to your household, can you tell me the percentage delivered by An Post and the percentage delivered by other postal service providers?



- There continues to be a slight uplift in the percentage of mail delivered by An Post.
- Dublin residents were slightly most likely to cite other providers delivering more of their mail .
- ABC1s were also more likely to report other providers delivering more of their mail (3% v's 2% overall)
- Those who shop online claimed 2% of mail deliveries came from other providers, versus 1% among those who don't shop online.
- Among those who send mail with other service providers, 5% of their mail is delivered by other service providers.

Quantity and Types of Mail Delivered - I

Q. For each of the mail types that I am going to read out, can you tell me if the total number of letters you receive generally each week from all postal service providers has increased, decreased or remained the same over the past twelve months?



- Six in ten (59%) feel that the level of all types of personal mail sent to them has remained unchanged in the past year.

Letters from friends / Relatives

- One in three (30%) feel that the level of personal post from friends / relatives has decreased this year.
- In terms of decreases in personal mail (from friends/families) those living in Munster are most likely to have seen a decrease (35%) along with Farmers (34%). Very little difference was noted between ages.

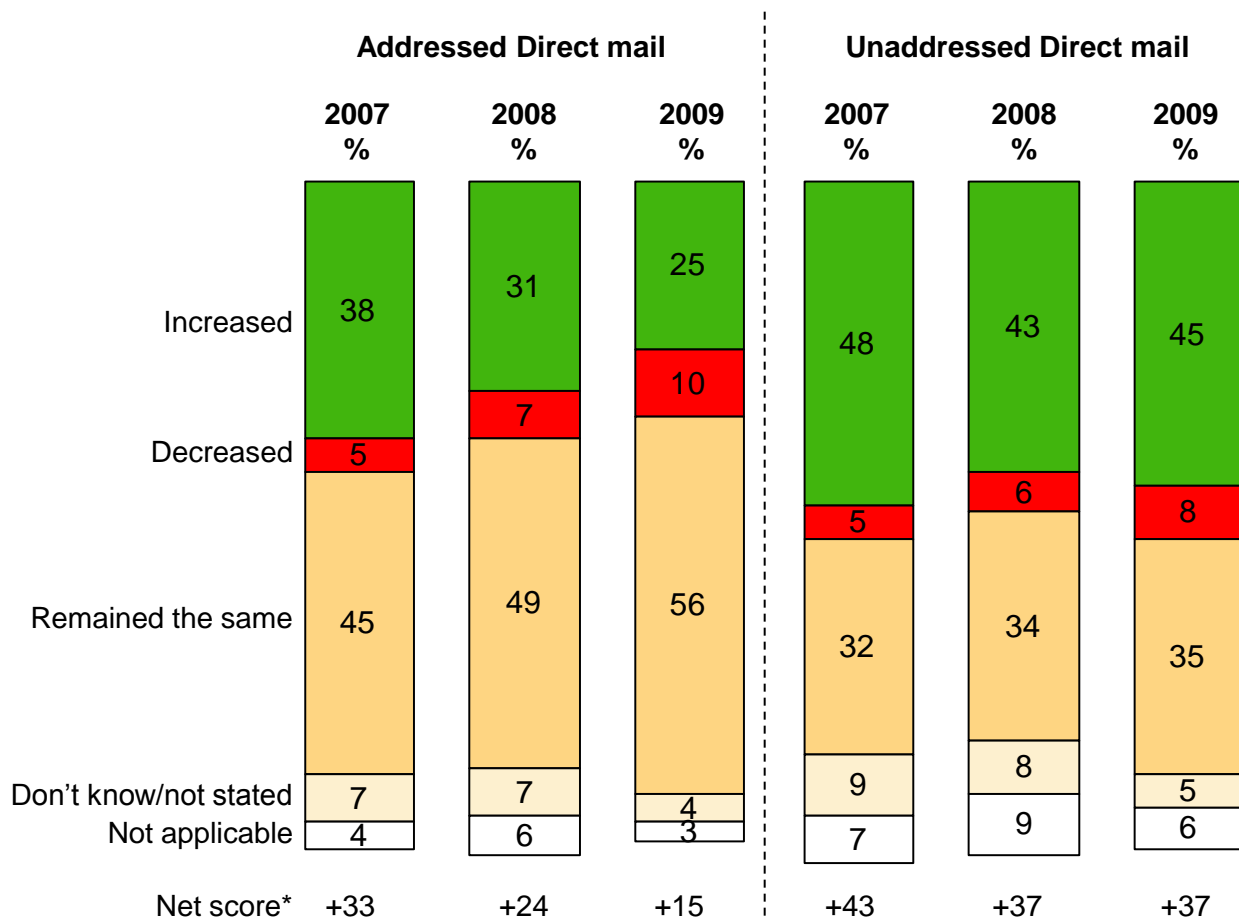
Letters from Businesses

- In terms of increases in mail from business, 18-24 year olds (25%), Munster residents, ABC1s and Farmers (26%, 26% and 26% respectively) were most likely to have experienced an increase.
- Homeowners (24%) and those with access to the internet (25%) also saw increases in personal mail sent from business.

* Net score = those who claim an increase minus those who claim a decrease

Quantity and Types of Mail Delivered - II

Q. For each of the mail types that I am going to read out, can you tell me if the total number of letters you receive generally each week from all postal service providers has increased, decreased or remained the same over the past twelve months?



Addressed Direct Mail

- There has been a steady increase in the number of respondents indicating a decrease in the amount of addressed direct mail delivered to them over the last three years.
- Those most likely to have seen an increase in addressed direct mail were aged 35-49 (28%), living in Leinster (excl. Dublin) at 34%, those who shop online (27%) and farmers (31%).

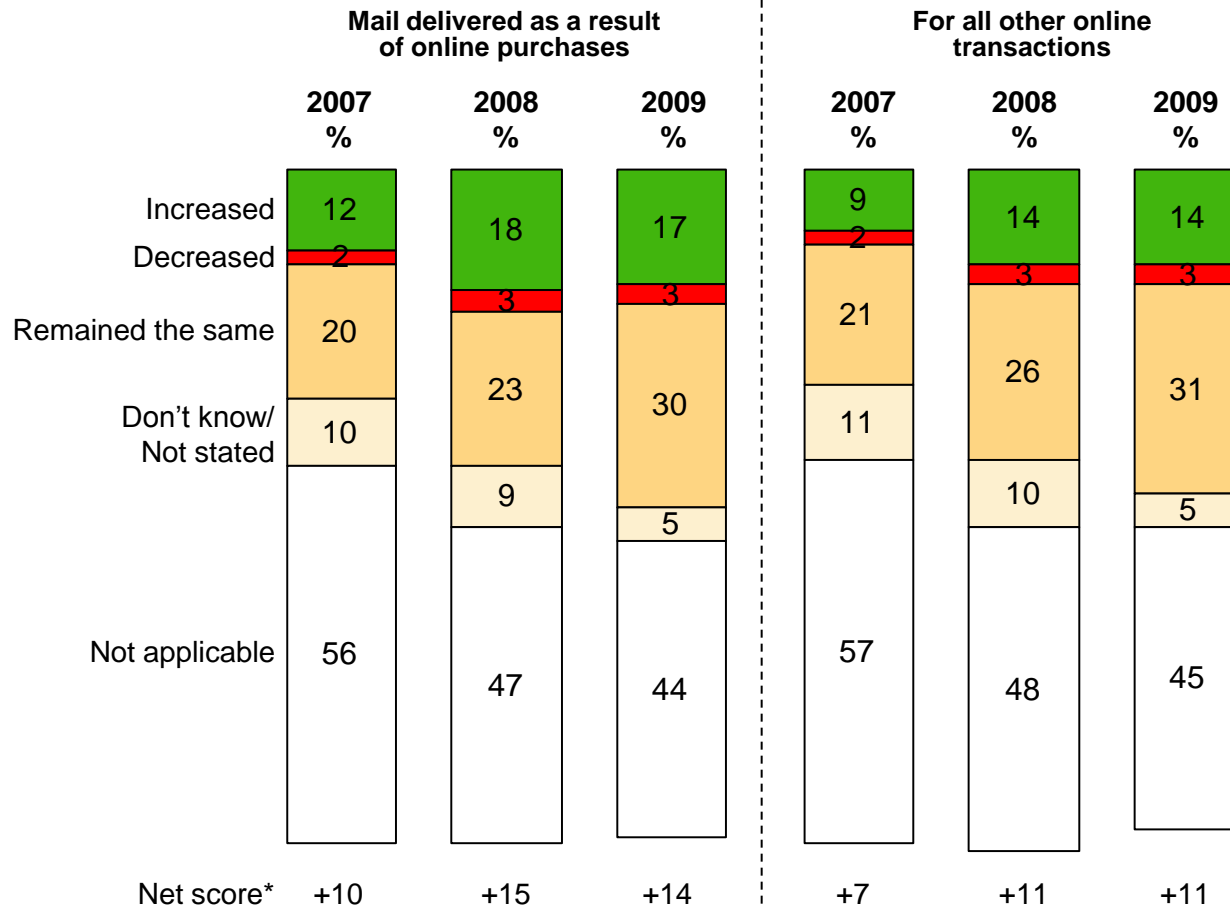
Unaddressed Direct Mail

- Those most likely to have seen an increase in unaddressed direct mail were aged 35-49 (49%), living in Leinster (excluding Dublin) (57%) and be farmers (47%).

* Net score = those who claim an increase minus those who claim a decrease

Quantity and Types of Mail Delivered - III

Q. For each of the mail types that I am going to read out, can you tell me if the total number of letters you receive generally each week from all postal service providers has increased, decreased or remained the same over the past twelve months?



- The incidence of mail received relating to all types of online transactions has stayed static during 2009.

Online Purchases

- 23% of Munster respondents have seen an increase in mail as a result of online shopping, along with 31% of ABs.

All Other Online Transactions

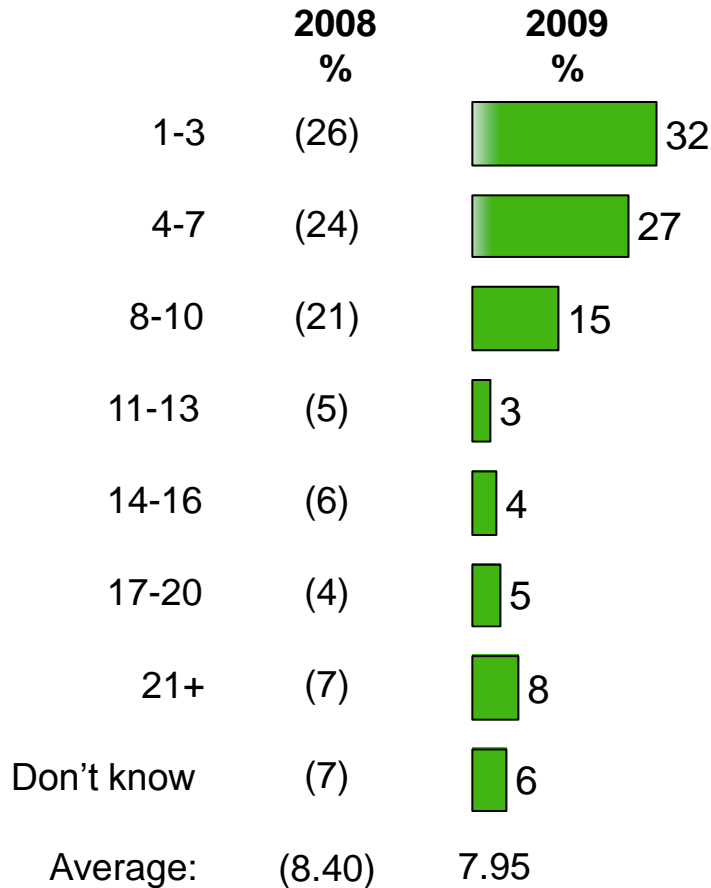
- Increases in online transactions were more prevalent among those aged 35-49 (18%), students (20%), Munster respondents (21%) and ABs (26%).

* Net score = those who claim an increase minus those who claim a decrease

Mail Sent

Amount of Mail Sent – Per Month Standard Sized Envelopes

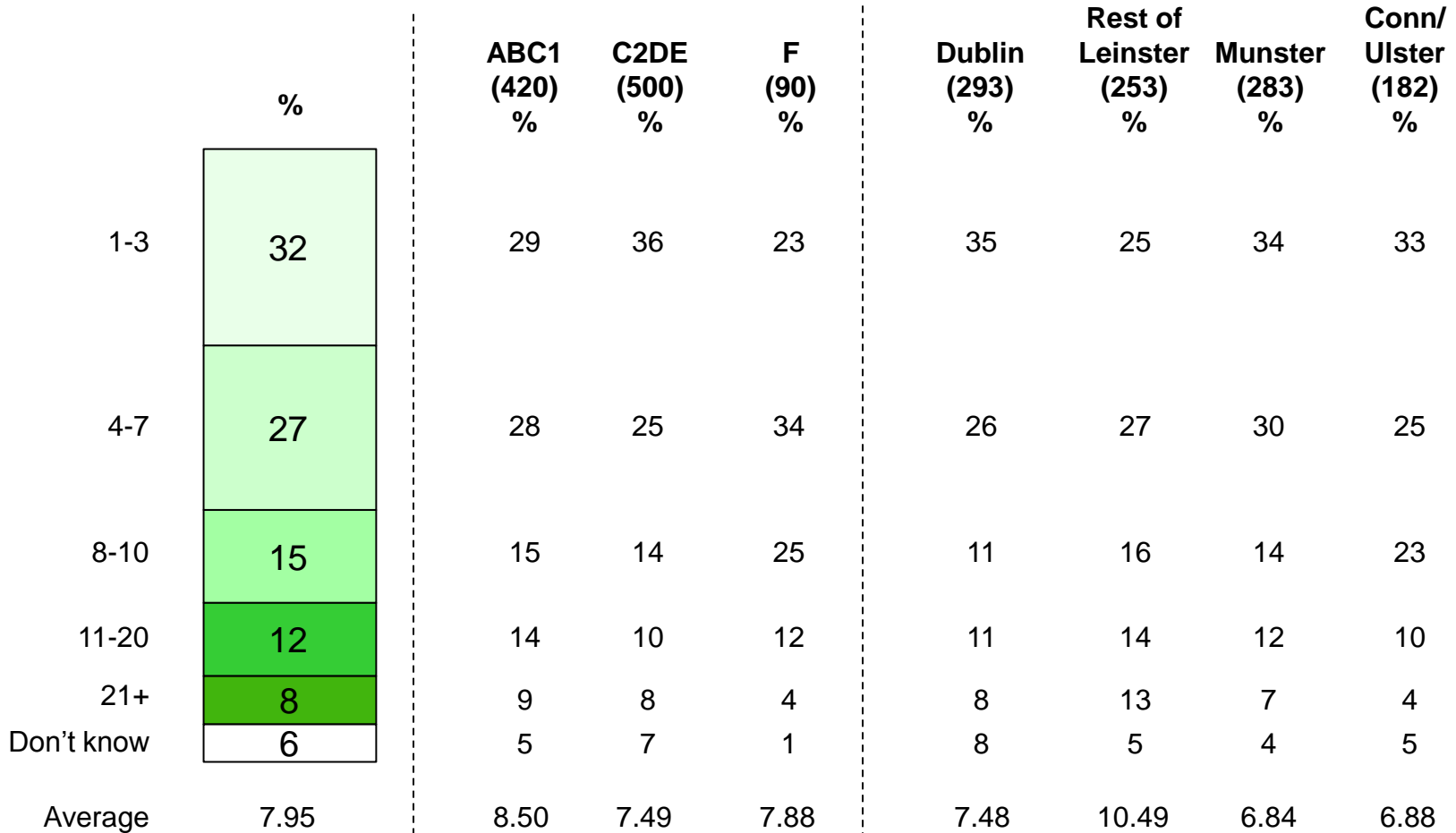
Q. What is the TOTAL number of standard sized envelopes posted by all persons resident in your household at this address each month?



- Just under eight items of mail per household are sent each month.
- ABC1s (8.50 items), driven by ABs (9.22 items) are most likely to send larger volumes, compared to just 7.49 items sent monthly among C2DEs.
- Both those with internet access (8.80 items) and online shoppers (8.52 items) are also above average senders of mail.
- Rest of Leinster respondents are the largest senders of standard sized envelopes (10.49 items)
- Conn / Ulster and Munster respondents send the least amount of mail per month (6.88 and 6.84, respectively).

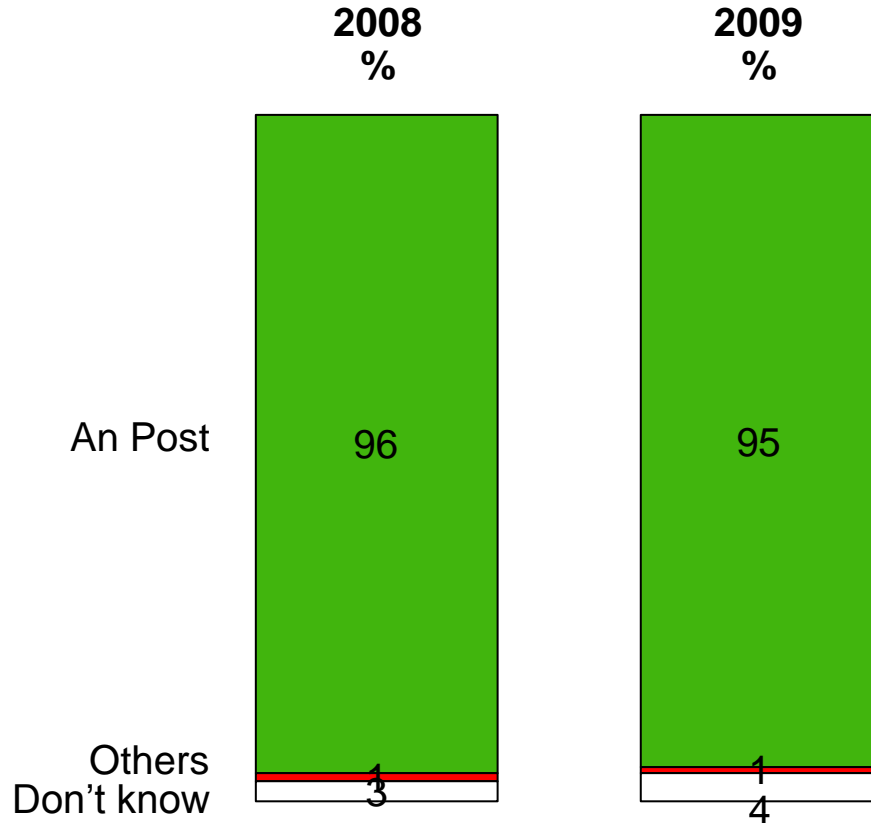
Amount of Mail Sent Per Month Standard Sized Envelopes

Q. What is the TOTAL number of standard sized envelopes posted by all persons resident in your household at this address each month?



Percentage of Standard Letters Sent Per Month – An Post Vs Other Service Providers

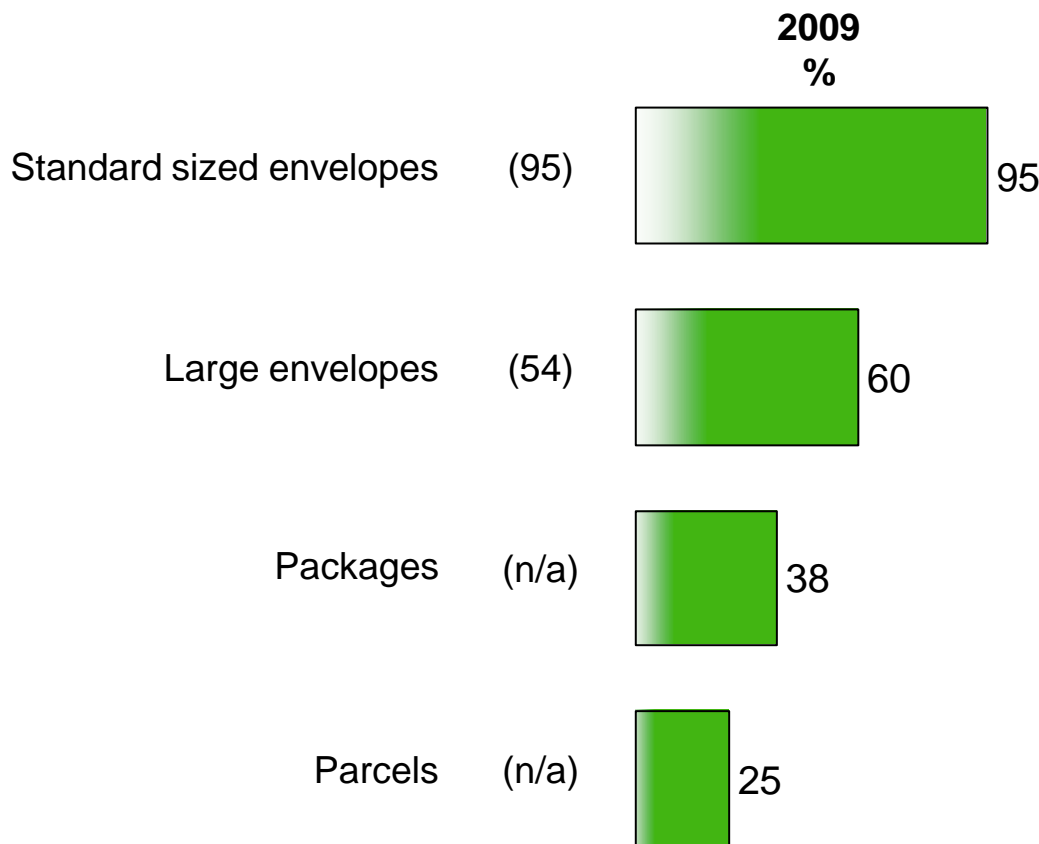
Q. Of the total number of standard sized envelopes posted each month, can you give the percentage sent with An Post and the percentage sent with other postal service providers?



- The vast majority of standard letters sent are sent with An Post, with few differences in terms of demographics, be it age, social class or region.
- Dublin respondents and ABC1s are more likely to use **other service providers** to send mail.

Types of Mail Sent – Over Last Year

Q. Can you tell me which of the following mail types you have sent over the last year?



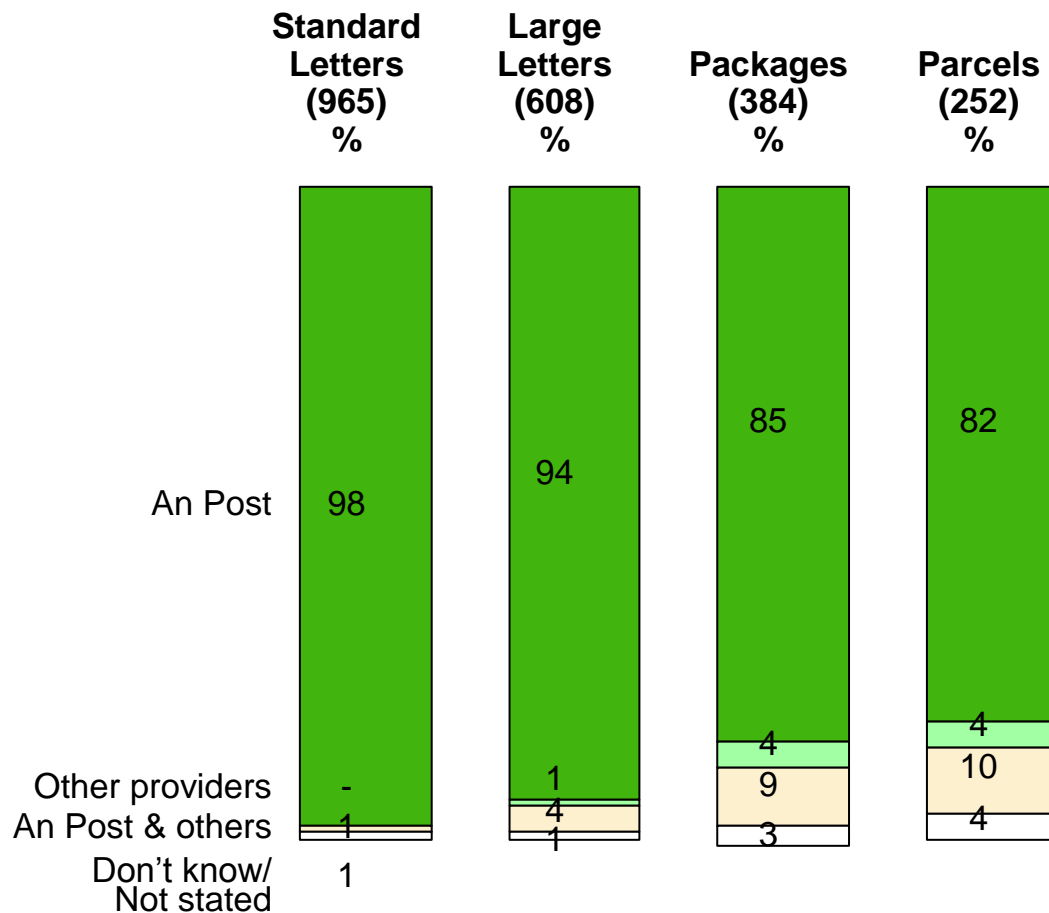
- Standard sized envelopes are by far the most frequently sent type of mail. Dublin respondents are least likely to send standard sized envelopes. (91%).
- Large envelopes however, are more likely to have been sent by 35-49 year olds (68%), Munster respondents (66%) and ABC1s (67%, rising to 72% among ABs).
- Those most likely to send packages were aged 35-49 (43%), residents of Munster (41%), ABC1s 44% (rising to 47% among ABs) and those who shop online (47%)
- A relatively similar profile is seen among those who send parcels, those aged 35-49 (29%), Dublin residents (30%) and ABC1s 30% (rising to 35% among AB's) and those who shop online (32%).

() 2008 figures

*Change in question wording from 2008

Postal Providers Used to Send Mail

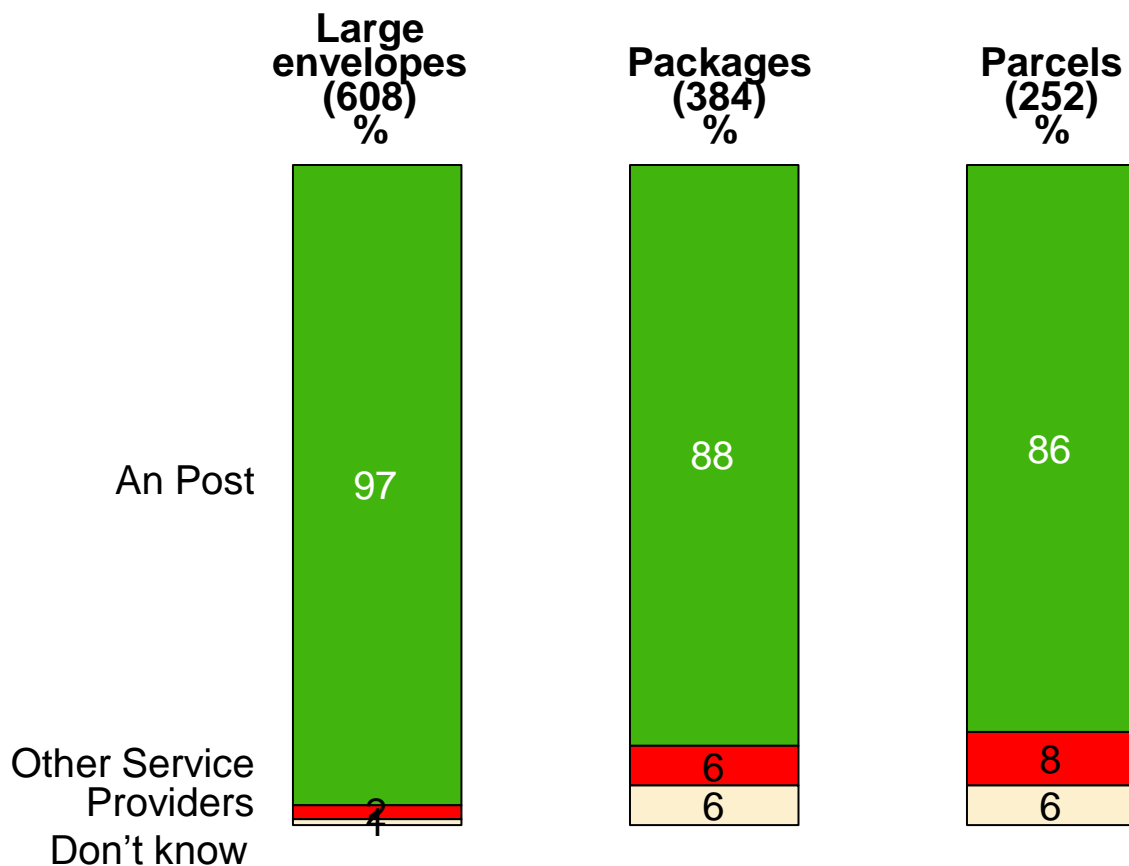
Q. Did you send these with either An Post or other Postal Service Providers?



- More residents use An Post to send both standard and large letters.
- In terms of providers used to send packages and parcels, An Post is still the preferred provider.
- Interestingly, those in Rest of Leinster (excluding Dublin) and ABC1s are more likely to use An Post and other providers to send both packages and parcels.

Proportions of Mail types sent – An Post versus Other Providers

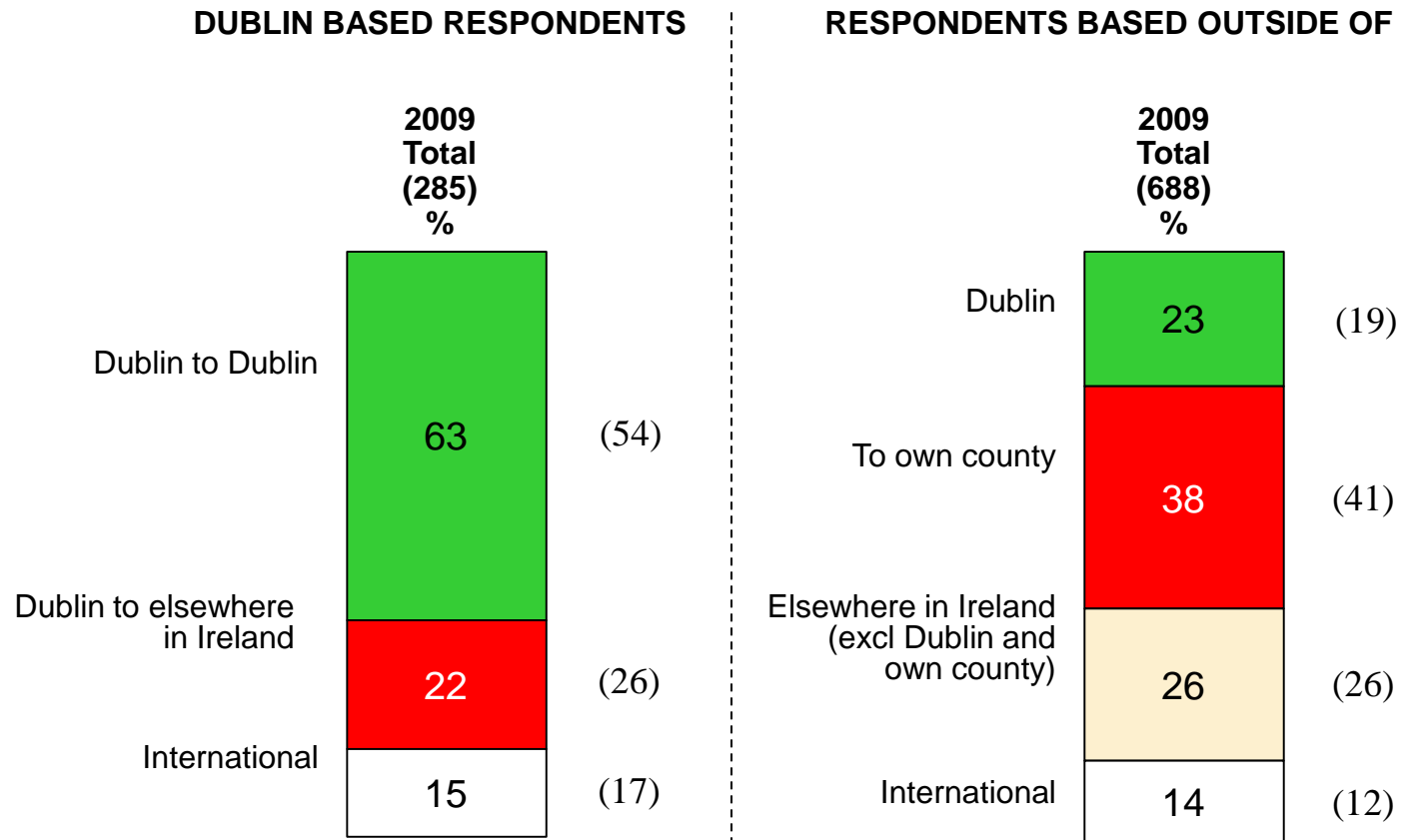
- Q. What percentage of your **Large envelopes** items is sent with An Post and with other service providers?
 Q. What percentage of your **Packages** is sent with An Post and with other service providers?
 Q. What percentage of your **Parcels** is sent with An Post and with other service providers?



- The vast majority of large envelopes sent are sent with An Post, with respondents in Rest of Leinster (6%) more likely to use other providers.
 - Younger respondents (18-24) are more likely to use An Post to send packages (91%) . (caution small base size)
- ABC1s are much more likely than their counterparts to use other service providers to send both packages and parcels (14% and 20% respectively).

Destination of Mail Items Sent

Q. Of the total number mail items (letters, packages and parcels) which you sent with all postal service providers in the last 12 months, what percentage were sent to the following destinations?

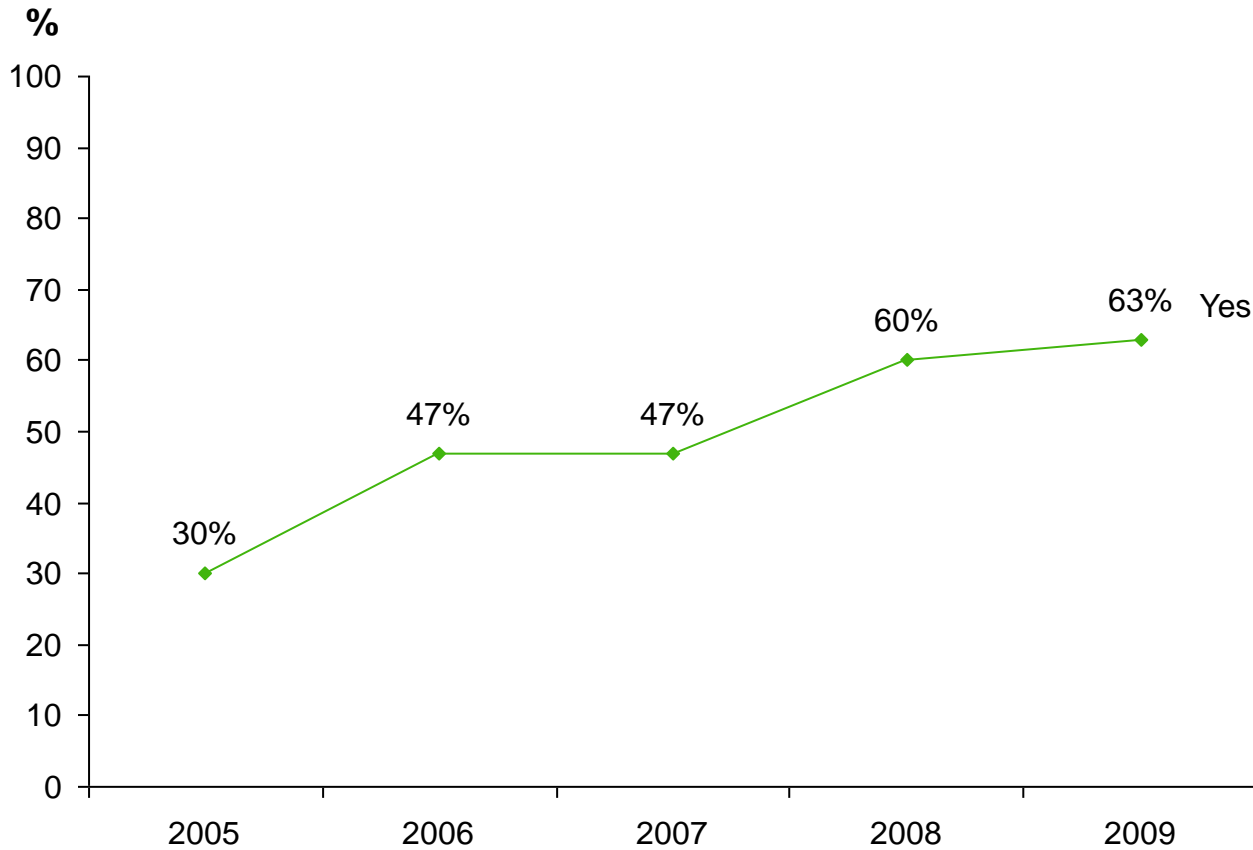


() 2008

Awareness/Usage of Postal Service Providers

Awareness of Other Service Providers

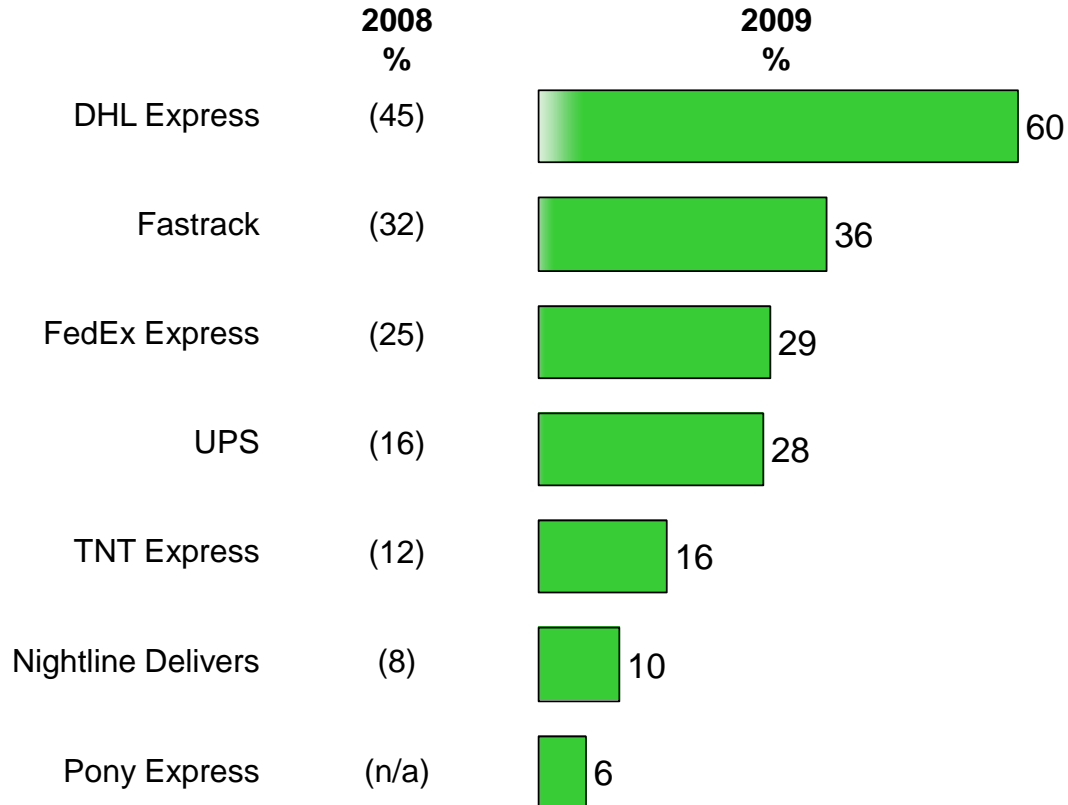
Q. Are you aware that you can use a company other than An Post for the sending and delivery of some postal items?



- Claimed awareness of any other service providers has increased slightly over the past year.
- When examined by behaviour, heavy senders of mail (14+/month), those with internet access and those who shop online are more aware of other providers (67%, 69% and 74% respectively).
- 25-34 year olds and 35-49 year olds are most likely to claim awareness of other providers (70% and 66% respectively).
- Dublin respondents are much more likely than their counterparts to claim awareness of other providers.
- ABs also claim to be more aware (76%), along with those aware of upcoming deregulation (73%).

Other Service Providers

Q. What other companies are you aware of that you could use for the sending and delivery of post, other than An Post?

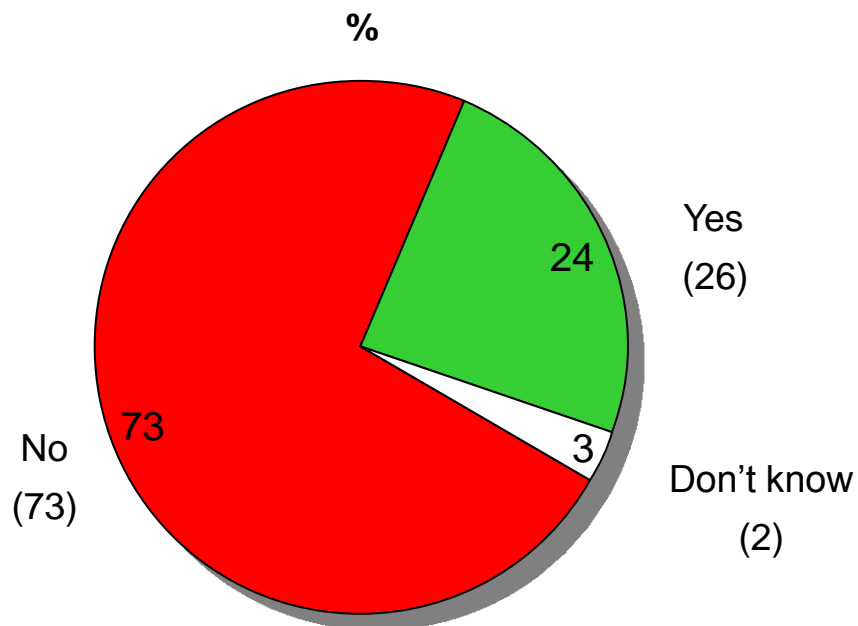


Includes all responses of 6% or more

Note: Multiple Responses allowed

Usage of Other Postal Providers

Q. Have you or any other person in your household used any company other than An Post to send mail over the past year?



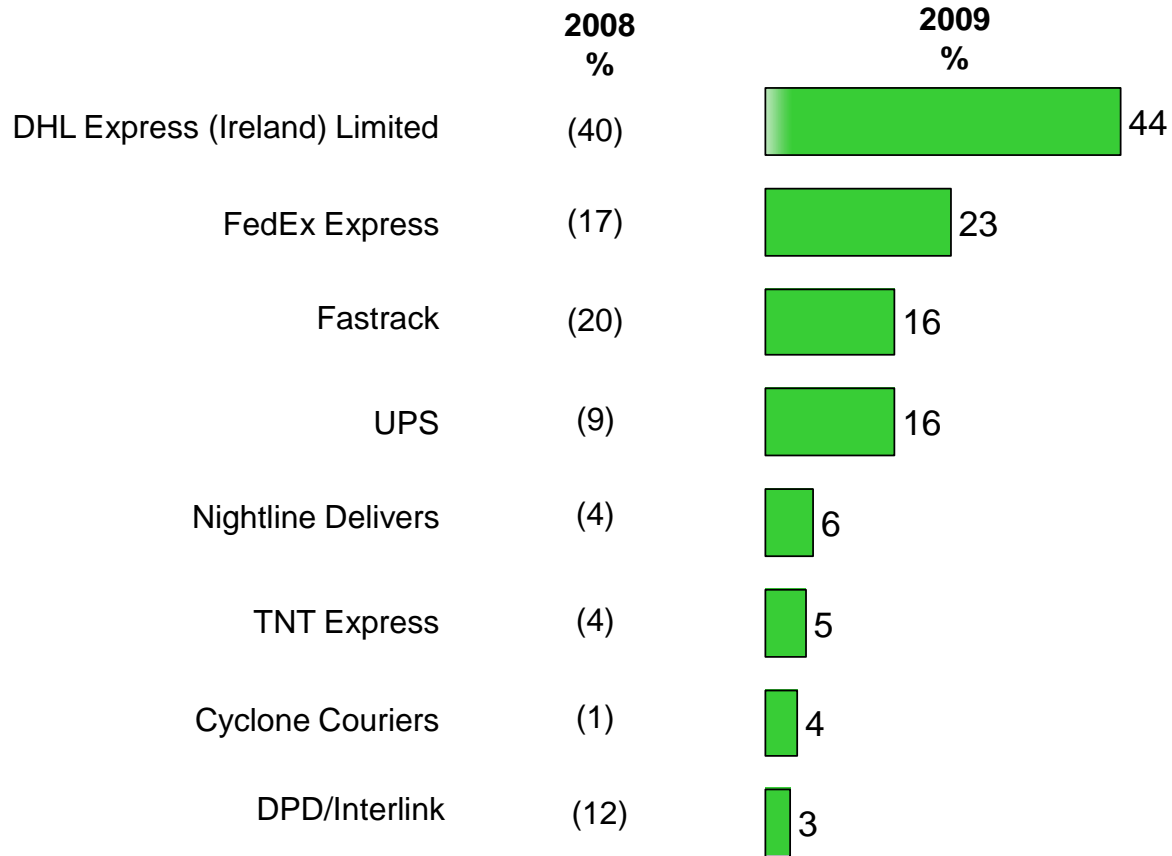
- Of those **claiming awareness** of other providers, one in four claim to have used them in the past year, equating to an overall claimed usage of 15%.
- Claimed usage was higher among males (25%), 25-34 year olds and 35-49 year olds (both at 26%), residents of Leinster (excluding Dublin) (29%) and ABC1s (32%, with ABs at 34%).
- In terms of behaviour, those who shop online (36%) are more likely to have used other providers .

(2008)

*Slight change in wording from 2008

Other Service Providers Used

Q. Can you tell me which company you have used to send mail over the past year?

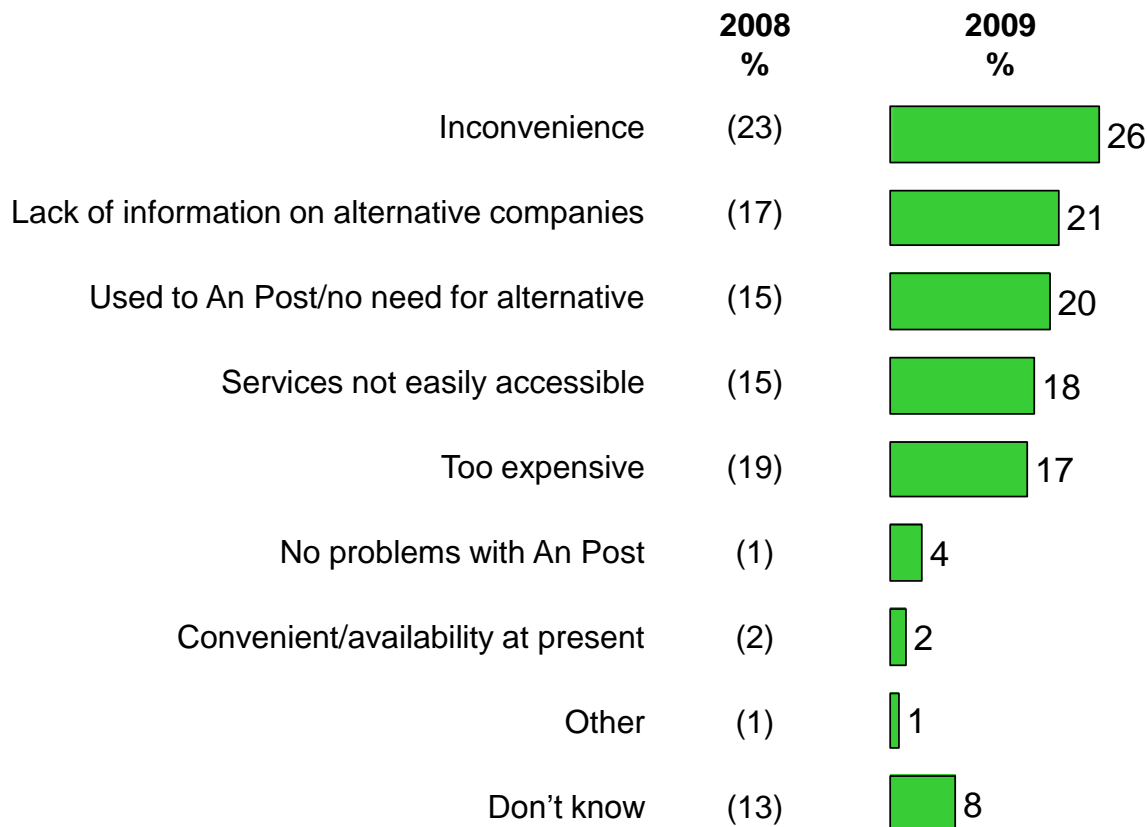


* Includes all responses of 3% or more

Note: Multiple Responses allowed

Reasons for Not Using Other Postal Service Providers

Q. What do you think is the main reason for you not using a service provider other than An Post for sending postal items?



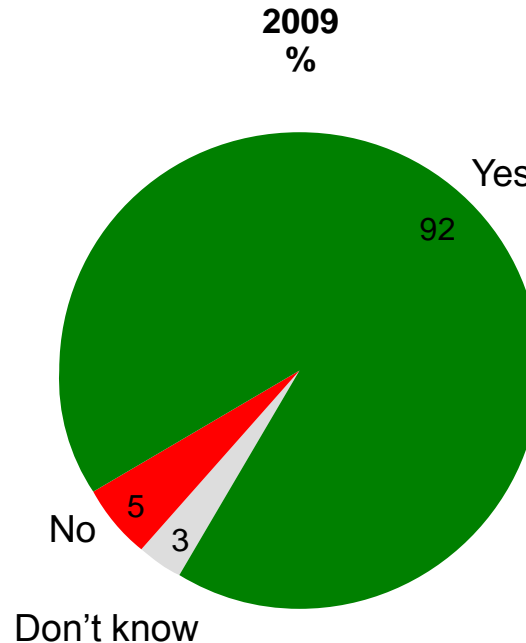
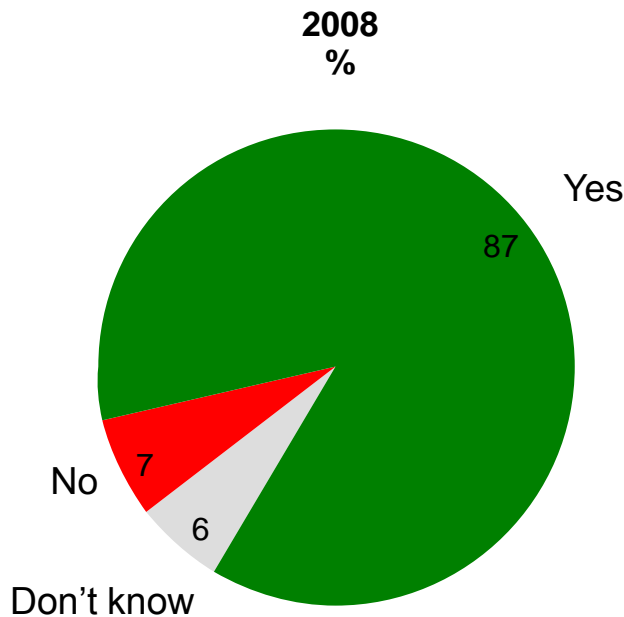
- Inconvenience/ continues to be the primary reason for not using other providers, followed by lack of information and a general apathy towards other providers.
- Respondents in Munster (22%), 25-34 year olds (22%) and Farmers (36%) * feel other providers are too expensive.
- Compared to last year males are more likely than females to cite inconvenience as the main reason they are not using other postal providers (32% v's 21% respectively).
- 50-64 year olds are also more likely to cite inconvenience when it comes to choosing a provider other than An Post (33%)

* Caution small base size

Attitudes to Postal Services

Satisfaction with the Availability of Information Provided by An Post

Q. Are you satisfied with the availability of information provided by An Post on the postal service products which you can use for sending your mail?

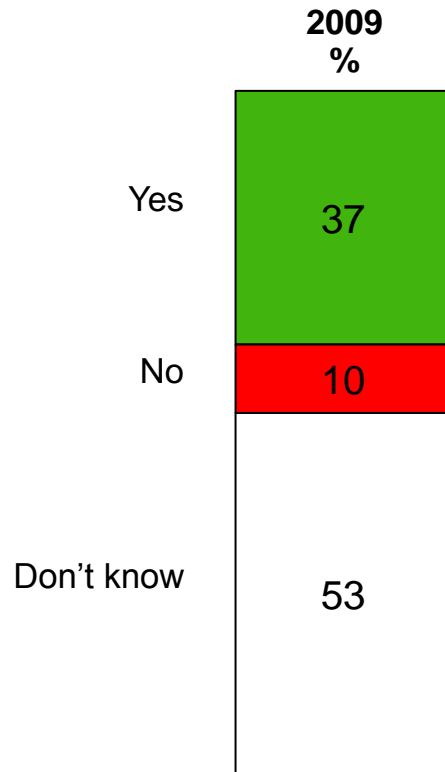


- The vast majority are satisfied with information on An Post available.
- Residents of Leinster excl. Dublin (95%) and homemakers (96%) seem more satisfied.
- In terms of dissatisfaction, those aged 50-64 are more likely than their counterparts to express dissatisfaction with the availability of information.

Note: there was a slight change in wording in 2009. Question previously referred to information provided at the local Post Office

Satisfaction with the Availability of Information Provided by Other Postal Service Providers

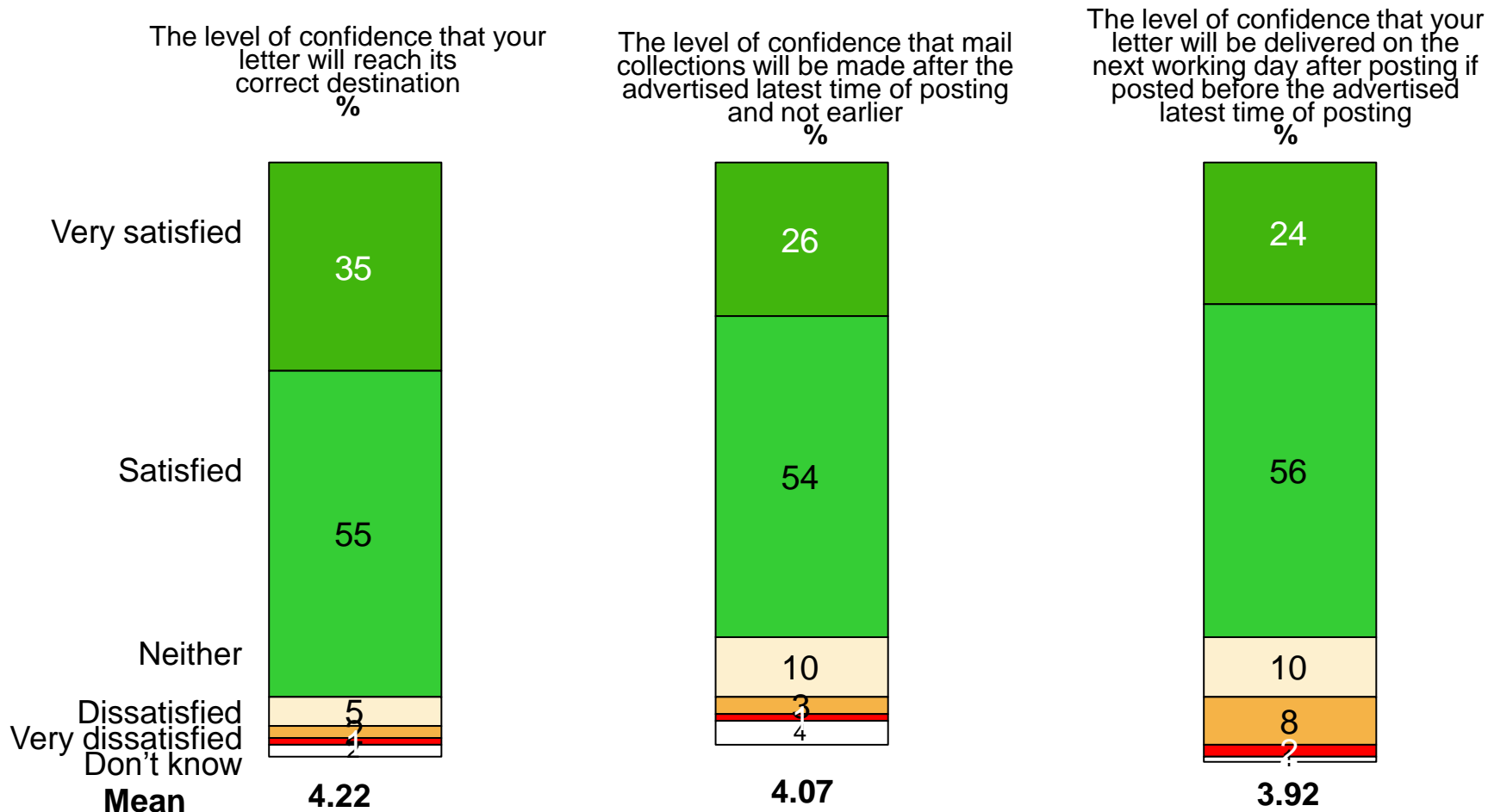
Q. Are you satisfied with the availability of information from other postal service providers on the postal service products which you can use for sending mail?



- Among those aware of other providers, three in four are satisfied with just one in ten dissatisfied.
- Those most satisfied are based in Munster at 46%, ABs (42%) and senders of moderate amounts (8-13 items) of mail (47%).
- Those who are aware of other provider, but do not have an opinion regarding availability of information are more likely to be aged 65+ (73%) or 50-64 (66%).
- They are also more likely to be based in Leinster including Dublin (60%), C2DE (61%) and be low volume senders of mail (62%).
- In addition they are less likely to have used other service providers (60%).

Satisfaction with An Post's National Post Service

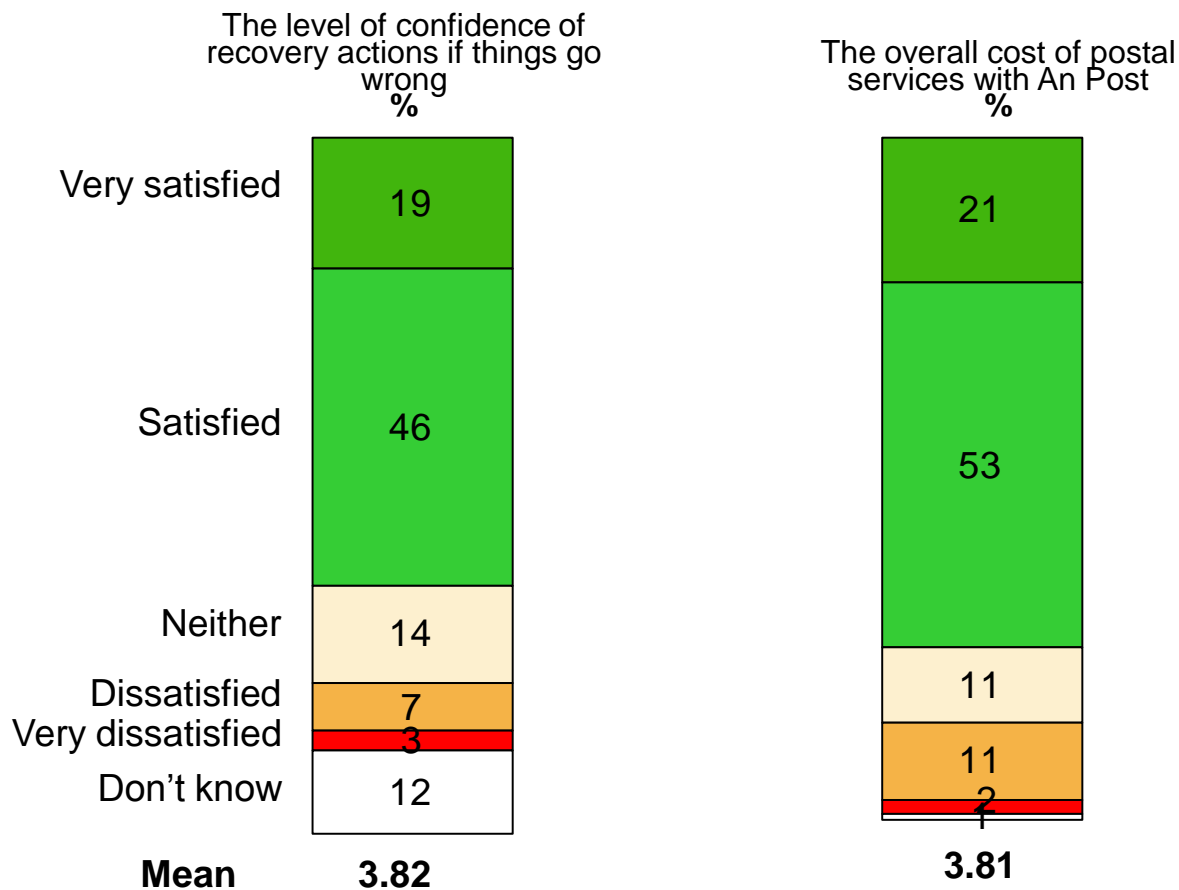
Q. I am going to read out a list of aspects related specifically to An Post's national letter post services only. For each one, please tell me if you are satisfied or dissatisfied with each aspect on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.



Base: All 18-74 (1,010)

Satisfaction with An Post's National Post Service

Q. I am going to read out a list of aspects related specifically to An Post's national letter post services only. For each one, please tell me if you are satisfied or dissatisfied with each aspect on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

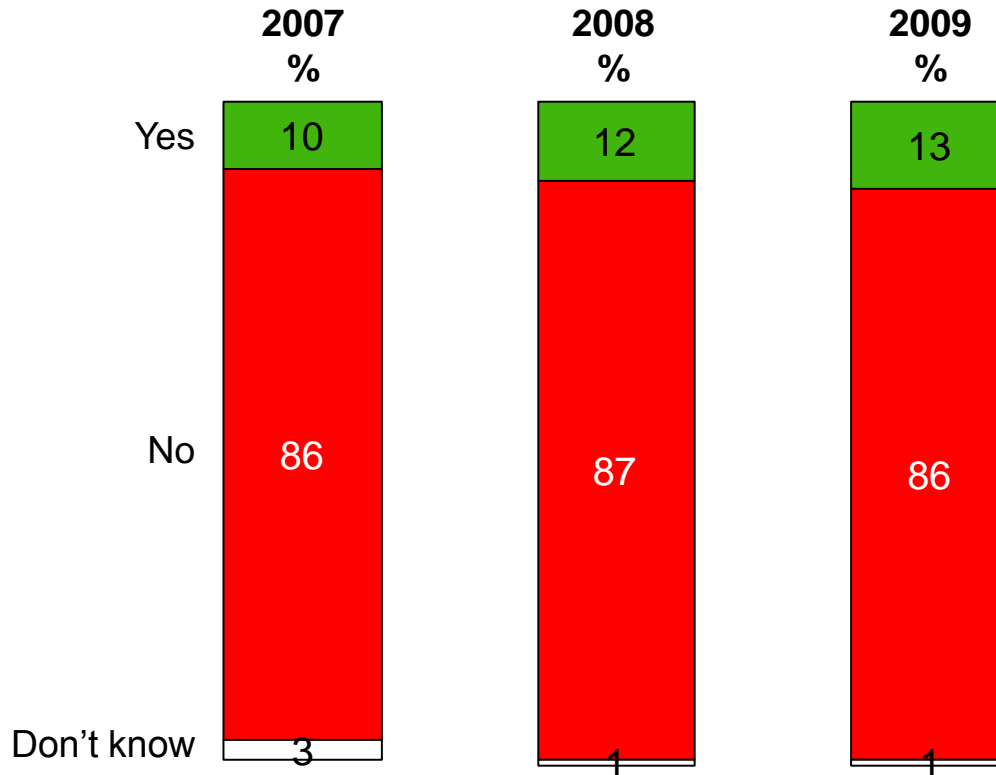


Base: All Respondents 18-74 (1,010)

Postal Complaints

Incidence of Dissatisfaction with Postal Services

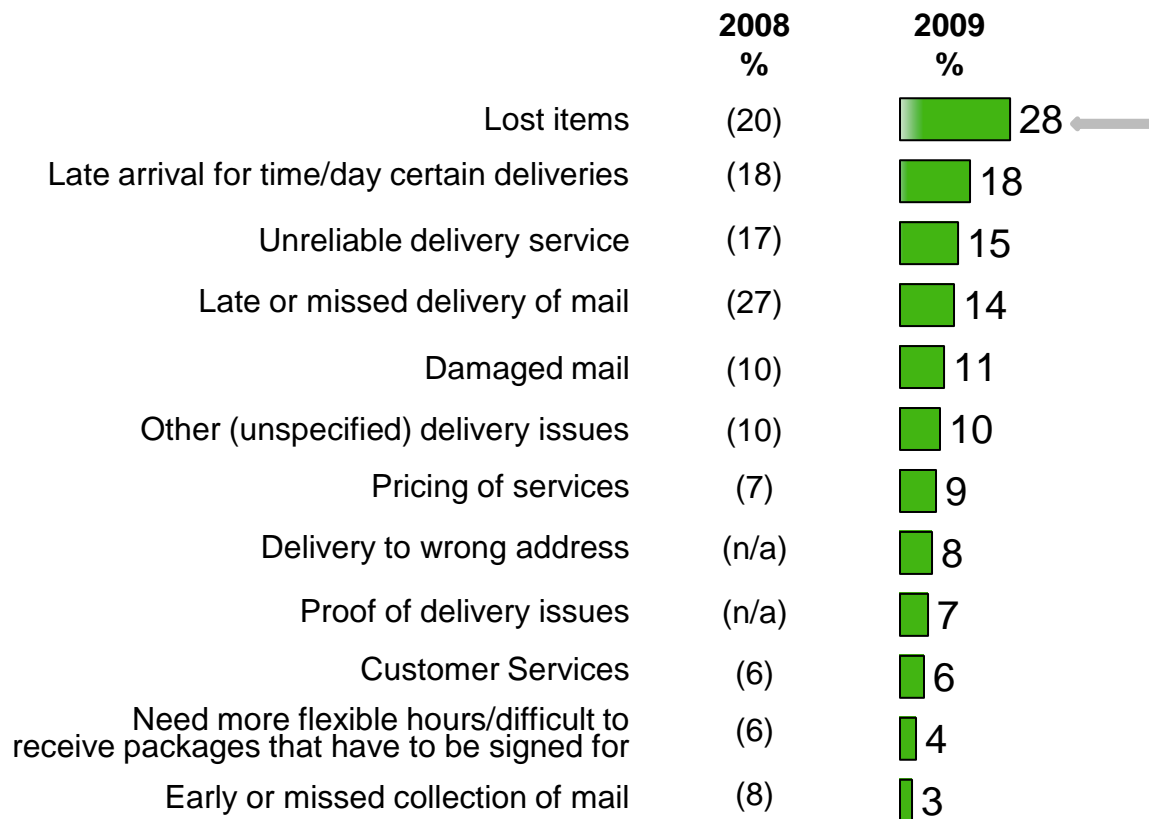
Q. In the past 12 months has there been any aspect of the postal service (provided by An Post or any other postal service provider) that you have been dissatisfied with?



- Incidence of dissatisfaction with postal services has increased slightly over the past 12 months.
- Those most likely to have had issues were Dublin based (16%).
- Females (15%), ABs (19%), C1s (16%) and those aware of upcoming deregulation (23%) were also most likely to have been dissatisfied with some aspect of the postal service.
- Behaviourally, those dissatisfied were more likely to be using other providers (22%) and be online shoppers (17%).

Reasons for Dissatisfaction

Q. What was the issue/or cause of this dissatisfaction?



- Generally, those most dissatisfied mentioned An Post (94%) as the service provider they were most dissatisfied with.
- There has been an increase in the number of respondents mentioning lost items as a reason for their dissatisfaction.
- Males (30%) and those living in Conn / Ulster (33%) were more likely to mention lost items as the reason for their dissatisfaction.
- Munster* respondents (22%) were most likely to cite late or missed delivery of mail as a reason for dissatisfaction.

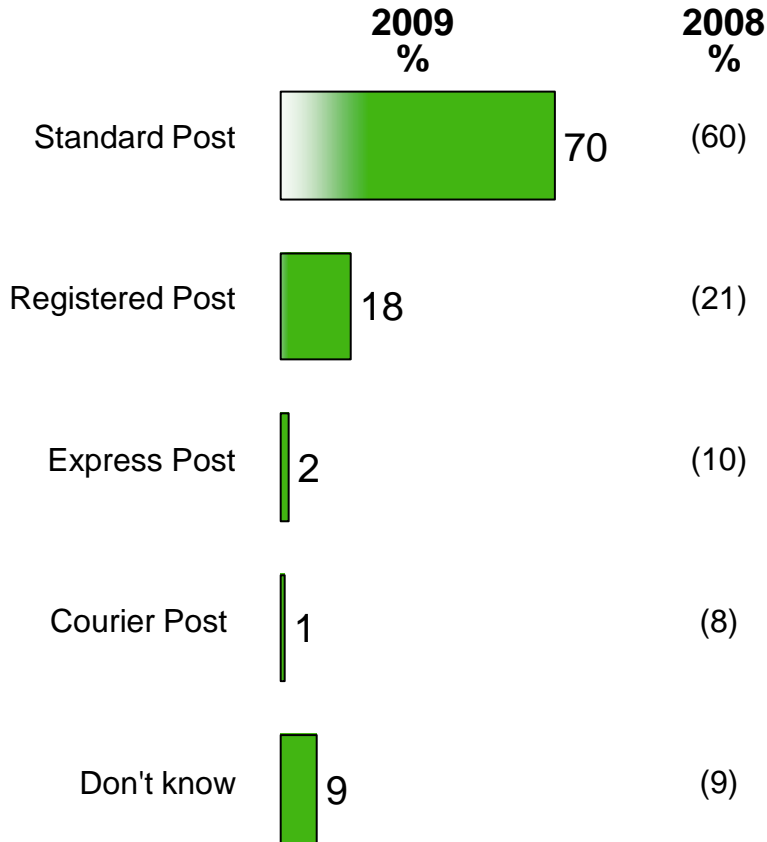
Note: Answers under 3% not shown

* Caution small base size

Elements of An Post's Service Which Caused Dissatisfaction

Dissatisfaction with An Post – Service Used

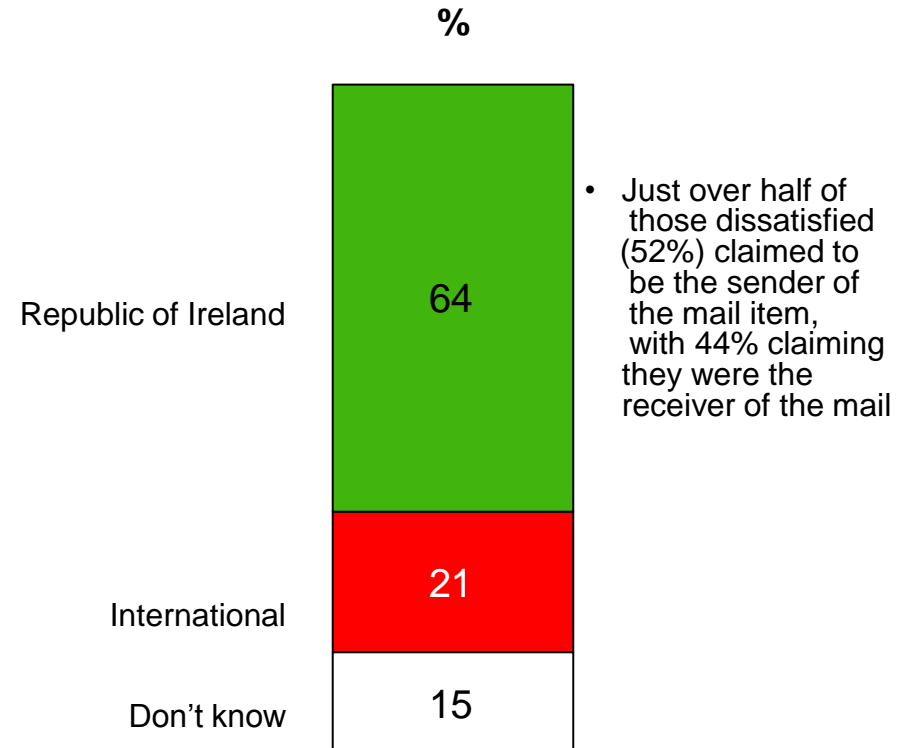
- Do you remember which of the An Post Postal Services you used? Was it...



Note: Multiple answers allowed

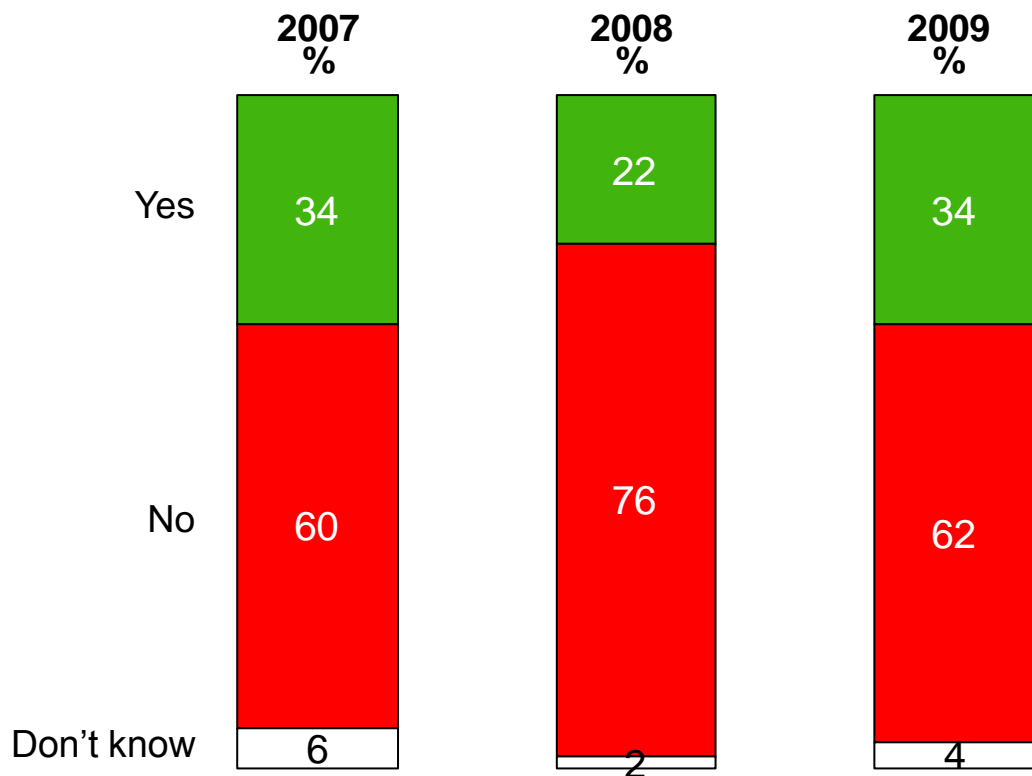
Dissatisfaction with An Post – Destination of Mail

- And was your mail item sent to a Republic of Ireland or an International destination?



Reporting the Complaint

Q. Did you lodge/make a formal complaint about this issue/any of these issues in the past 12 months?



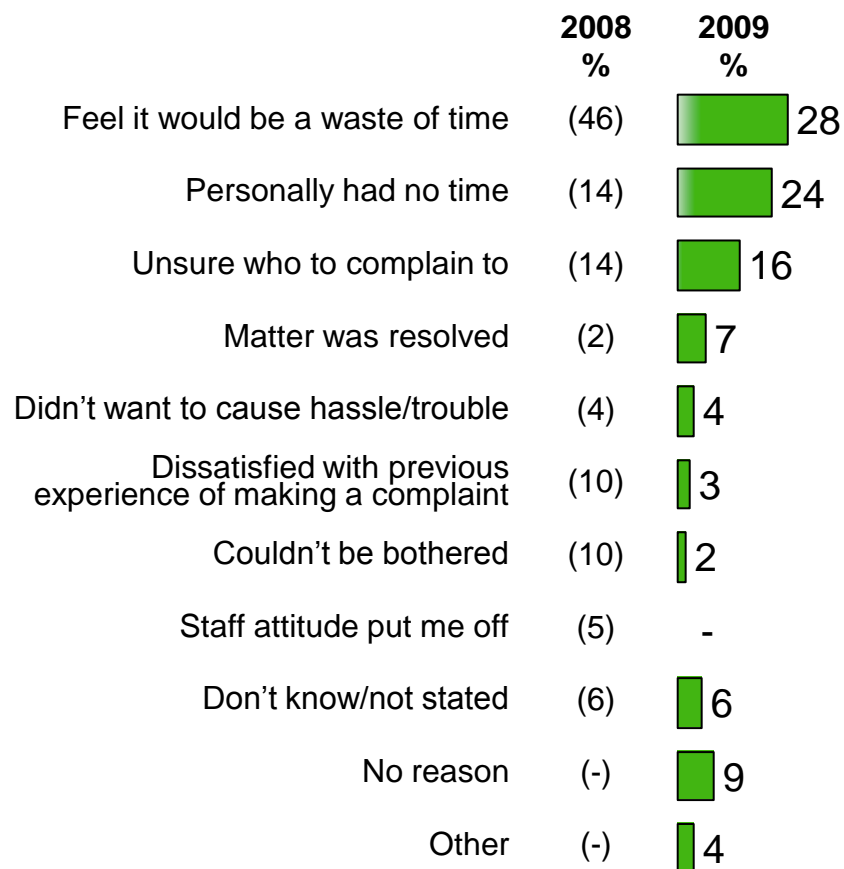
- Similar to 2008, 87% complained to the postal service operator directly.
- Those most likely to complain were male (38%), living in Munster (44%), ABC1s (38%) and “medium” users of the postal service, receiving or sending 8-13 items of mail weekly/monthly* (35% and 42% respectively).
- Those least likely to complain were aged 18 – 24 (71%), C2DE (71%) and those living in Rest of Leinster (excluding Dublin) (78%).

*Caution: Small base size

Base: All dissatisfied with Postal Service in past 12 months (134)

Reasons for Not Making a Complaint

Q. What would you feel was the main factor in deterring you from making a formal complaint?

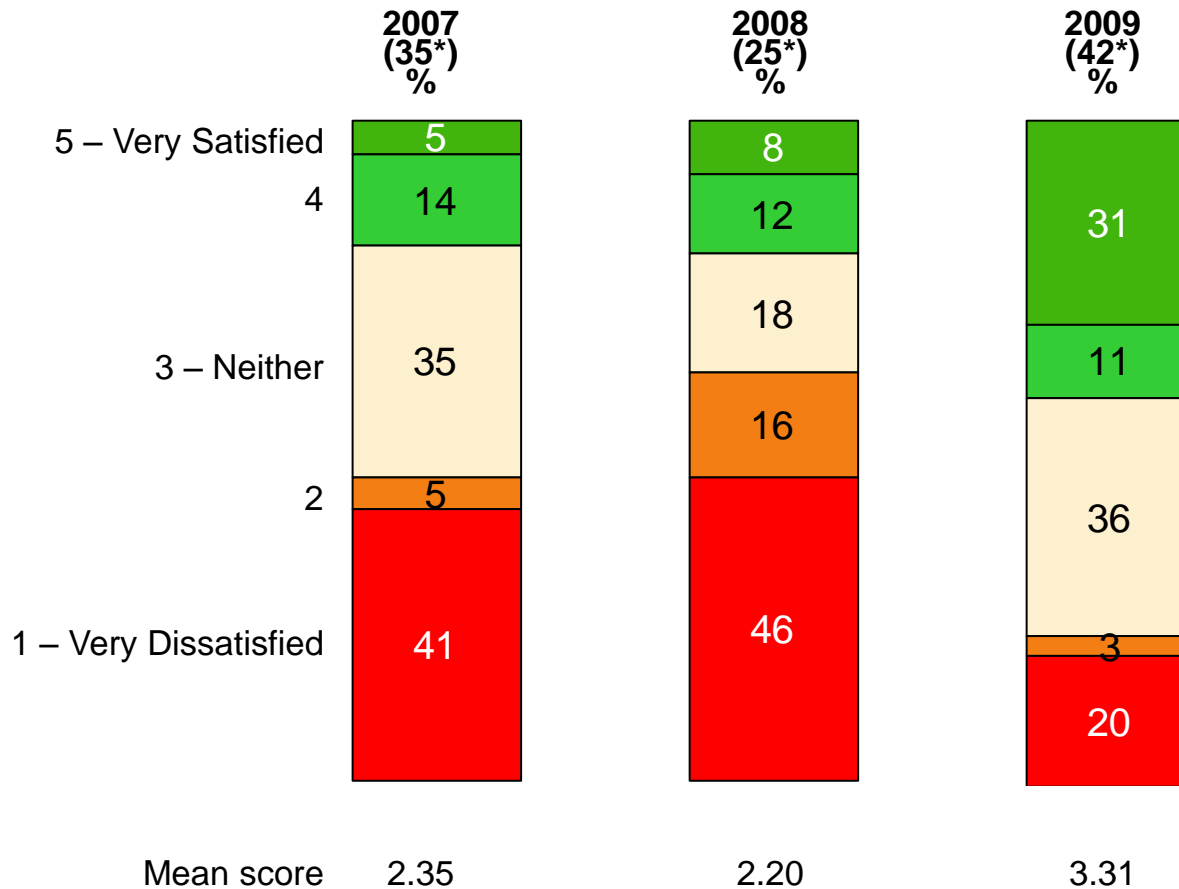


- Females (36%) and Dublin respondents (34%) were more likely to feel that making a complaint would be a waste of time.
- Males are more likely than females to mention they are unsure of who to make the complaint to, and that they personally had no time to make a complaint.

Note: Answers 3% or under not shown

Satisfaction with Complaints Procedure

Q. How satisfied were you with the handling of your complaint(s) by the organisation you contacted on a scale of 1 to 5, where 1 is very dissatisfied and 5, very satisfied?



- Levels of satisfaction with handling of complaint has **improved** dramatically this year.
- Those most satisfied were aged 50-64 (66%)* and living in Munster (66%)*
- Those most dissatisfied were 35-49 (40%)*, living in Dublin (27%)* and ABs (66%)*.
- One in three who made a complaint to An Post were satisfied with the availability of information on the complaints procedures versus 54% who were not.

*Caution small base

**Desire for 2nd Class Service and
Awareness of Upcoming Market Liberalisation**

Perception of An Post's Performance for its 1st Class Service

Q. Where in the following ranges do you perceive An Post's performance for delivery within 1 working day to currently fall?

	2008 %	2009 %
96-100%	(12)	12
91-95%	(17)	18
86-90%	(17)	20
81-85%	(12)	11
76-80%	(13)	11
70-75%	(19)	18
Don't know	(10)	10

- Actual performance achieved by An Post for next day delivery service in 2008 was 79%*.
- One half of all respondents (50%) believe An Post achieve 86% or above for delivery within 1 working day, a 4% increase from 2008.
- One in five respondents (18%) feel An Post are achieving performance of less than 75%.

* Source: ComReg

Likelihood of Using a 2nd Class Service – Hypothetical Scenario

Q. In addition to the current 1st class service, if there was the option of a second class service, where mail is delivered for example over 2 working days, at a cheaper price, how much of your mail would you be likely to send using the 2nd class service if it were available?

	2008 %	2009 %
All of my mail	(20)	11
All of my non-priority mail	(30)	29
None of my mail (all sent 1 st class)	(23)	26
Some of my mail/it depends	(21)	23
Don't know	(7)	11

Two-fifths of all respondents claimed they would send a high percentage of their mail using a 2nd class service if it were available

- One in four (26%) claimed they would send **no mail** using a 2nd class service if it were available.

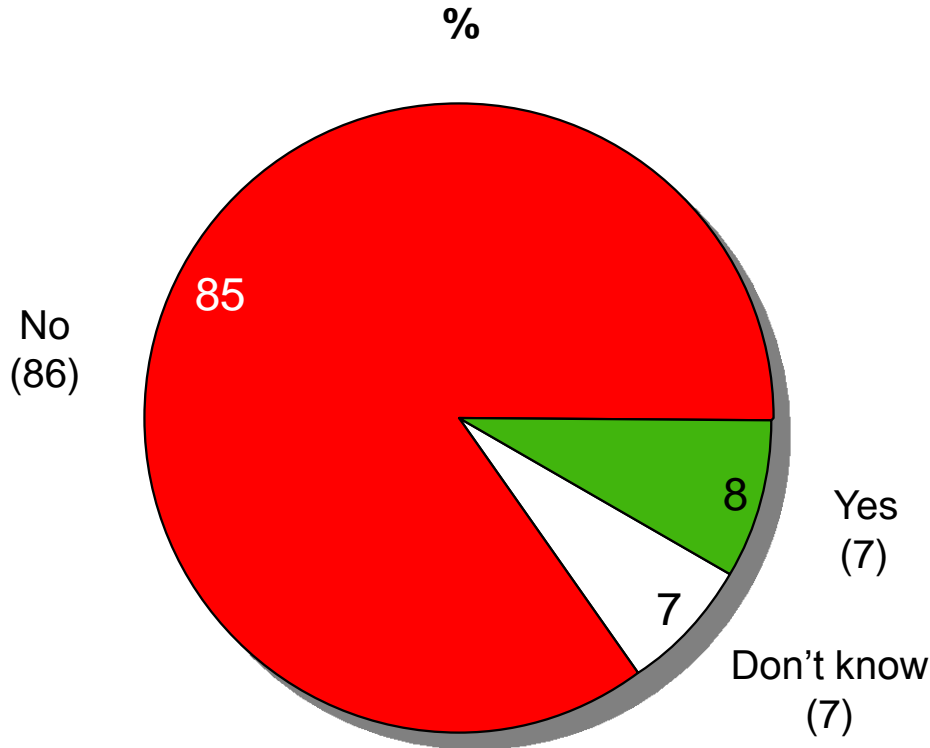
The older age group (65+) (31%), those living in Conn / Ulster (33%) and AB's (32%) are more likely to mention they would send no mail using a 2nd class service.

Those more likely to send all of their mail were female (13%), aged 65+ (15%), be living in Munster (13%) and be C2DE (13%).

Note: Question wording changed in 2009; previously an example of a 10c discount for such a service was mooted

Awareness Of When An Post's Standard Letter Monopoly Will End - I

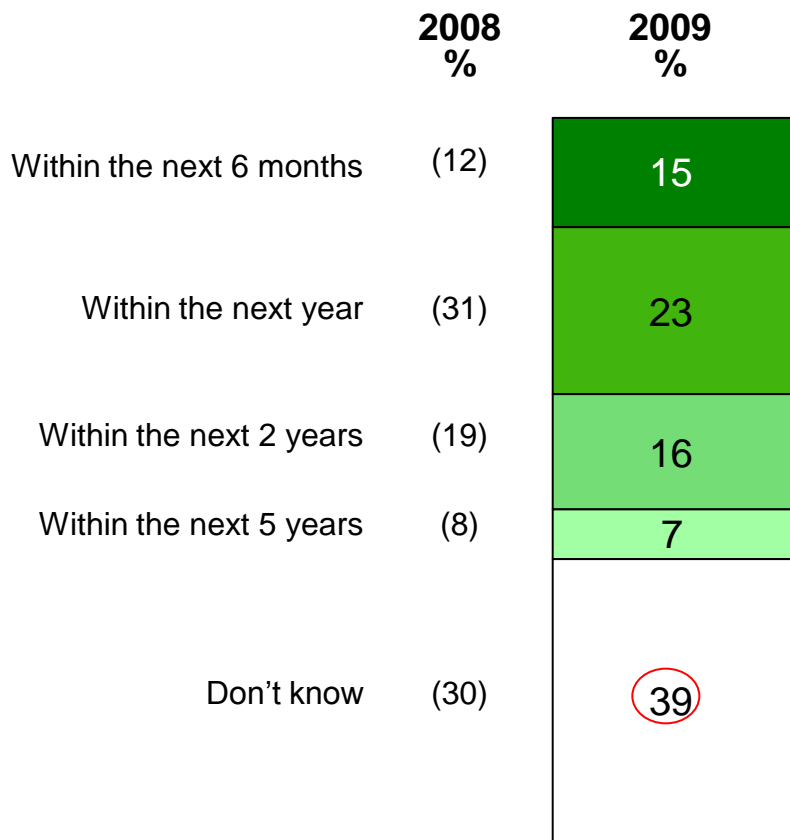
Q. Do you know when the postal market will be fully opened to competition in Ireland by the removal of An Post's monopoly of the standard letter market?



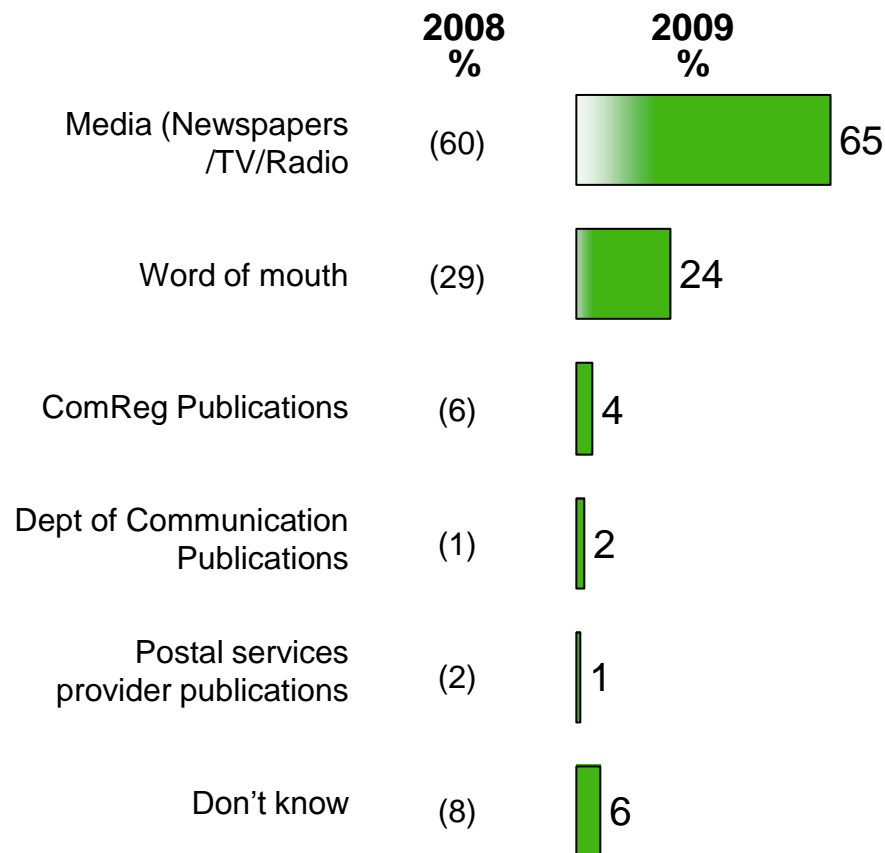
- Similar to 2008, a large majority are unaware of when the postal market will fully open to competition.
- Those claiming to be aware were more likely to be aged 50 -64 (11%) residents in Conn/Ulster (12%) and ABs (12%).
- In terms of behaviour, those using other service providers were most aware (13%) along with heavy receivers (12%) and senders of mail (11%).

Awareness of when An Post's Standard Letter Monopoly will end - II

Q. Approximately when do you think this is due to happen?

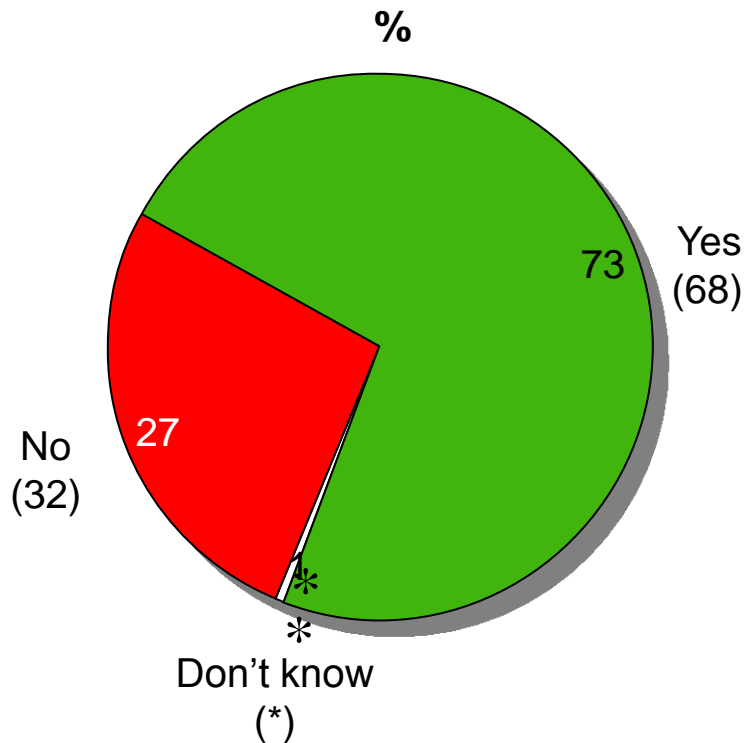


Q. Where did you hear about this?



Internet Usage and its effect on Postal Services

Q. Do you have access to the Internet at home?

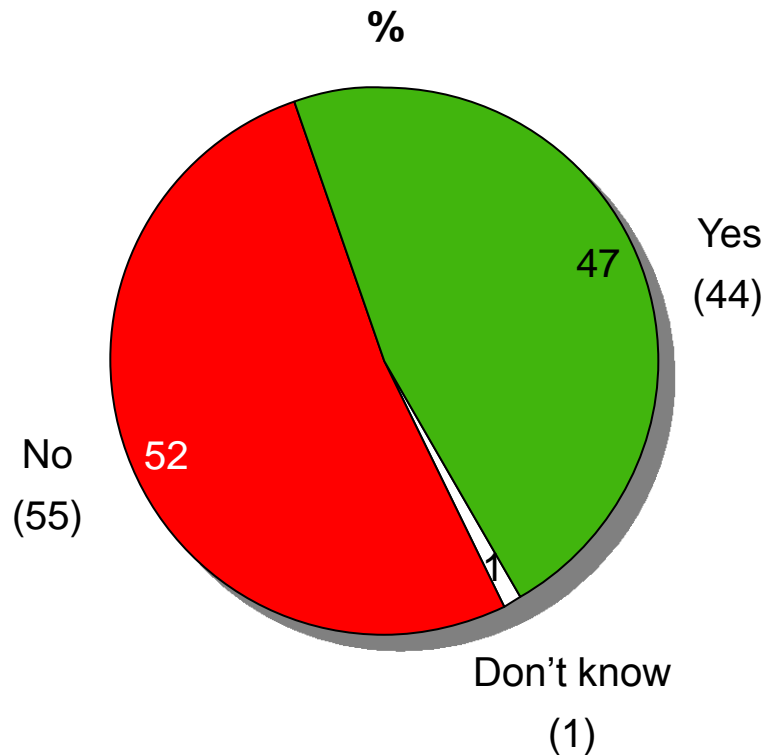


- There is a general connection correlation between age and internet access— 83% of those aged 18-24 have access compared to 61% of those aged 50-64 and only 33% of those 65+.
- Penetration is highest in Dublin (81%) followed by Leinster (73%), Munster (72%) and Conn/Ulster (60%).
- In terms of SEG there is also a marked difference – 90% of ABC1s have access compared to 63% of C2DEs and just 48% access among those in the farming community.
- Those using other providers (93%), heavy receivers of mail (90%) and heavy senders (86%) are also more likely to have internet access at home.

() 2008

Incidence of Shopping Online

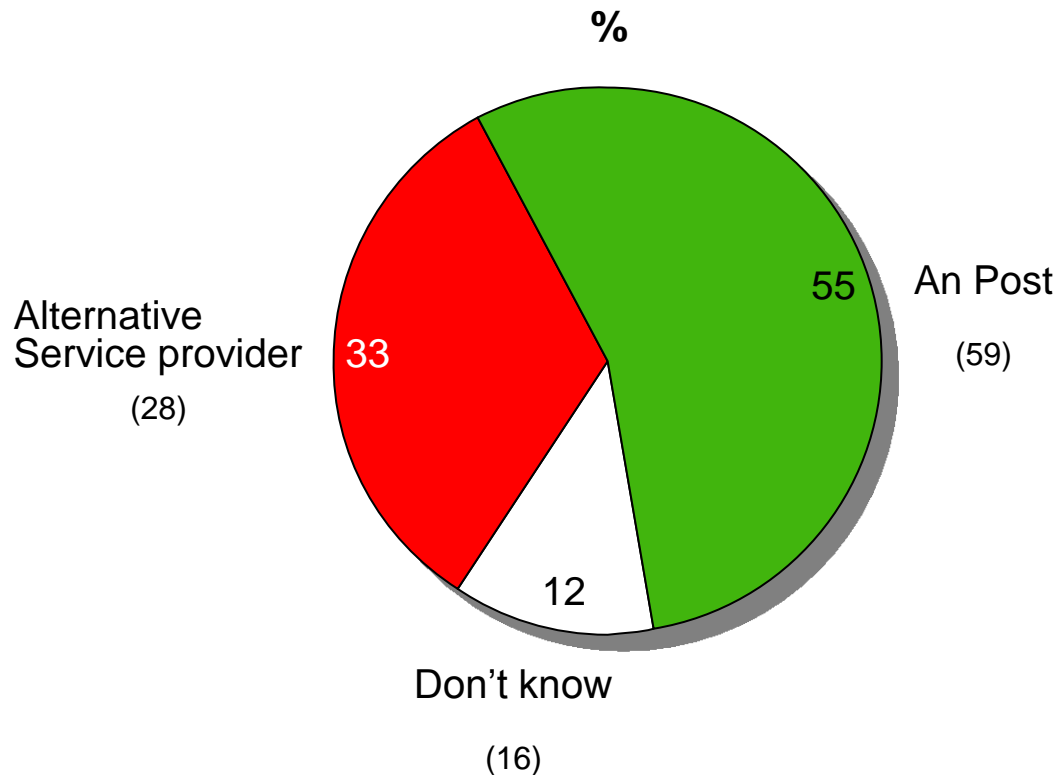
Q. Have you shopped for anything online over the past 12 months?



- 25-34 year olds are slightly more likely to shop online (64%) while not surprisingly, those aged 65+ are least likely (12%).
- Dublin residents are most likely (51%) to shop online, as are ABC1s (65%).
- Heavy senders of mail are also more likely to have shopped online (54%) along with those using other service providers (82%).
- 63% of those who have home internet access have shopped online, while only 4% of those without home internet access have also shopped online.
- Of those who do not shop online, the main reasons cited are not being able to see / test the product (39%), followed by accessibility issues (33% in total between lack of access, lack of knowledge and lack of credit card). Surprisingly, security (16%) is still an issue for many.
- Postal/delivery related concerns account for 7% of reasons for not shopping online.

How Goods purchased online are delivered

Q. Do you generally have these goods delivered to your household by An Post or an alternative postal service provider?



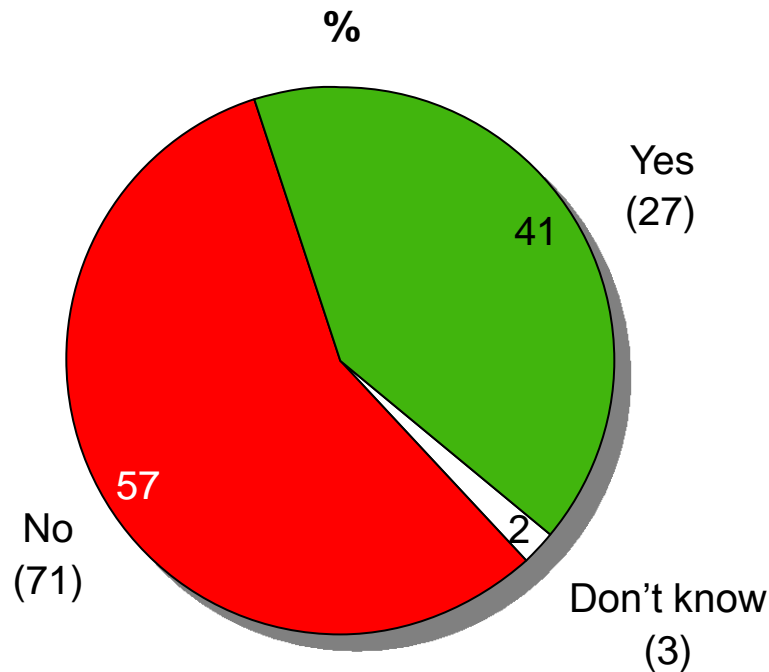
- Females (60%) and older (65+) respondents (64%)* are most likely to mention An Post for receiving their online goods.
- Munster residents are least likely to mention An Post for receiving their online goods (48%) whilst those in Dublin are most likely (61%).
- Overall one in eight do not know/pay no heed to which service provider delivers goods purchased online.
- Those more likely to use alternative service providers tended to be male (37%), aged 35-49 (38%), Munster based (42%), and claim to received larger (14+) volumes of mail (41%).

* Caution small base size

() 2008

Is the Internet used to view Utility Bills?

Q. Do you view any of your transaction type mail online (such as ESB, Phone, Banking details etc)?



- Females (43%) and those aged 25-34 (53%) are most likely to view utility bills online along with residents of Dublin (46%).
- Six in ten (58%) ABC1s view bills online, compared to just 29% of C2DEs.
- Those using other service providers along with heavy receivers and senders of mail are also more likely to view bills online (70%, 56% and 54% respectively).

Similar to 2008, 55% of those with home internet access view bills online

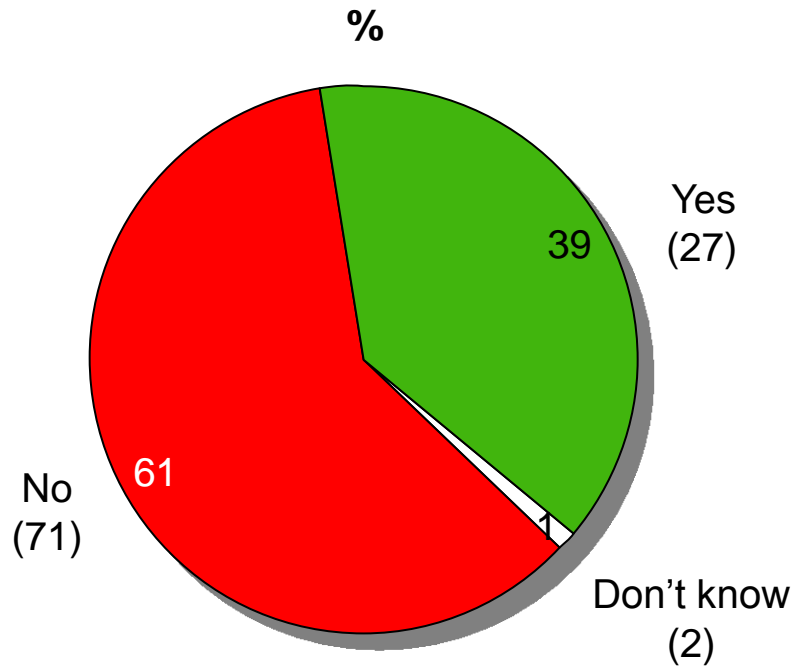
() 2008

Note: Question wording changed in 2009; previously referred to "Utility bills online such as ESB, Phone, Banking details etc"

Base: All Respondents 18-74 (1,010)

Incidence of Switching Utility Bills from Postal Delivery to Online

Q. Have you switched any of your transaction type mail from being delivered by Post to being delivered Online?

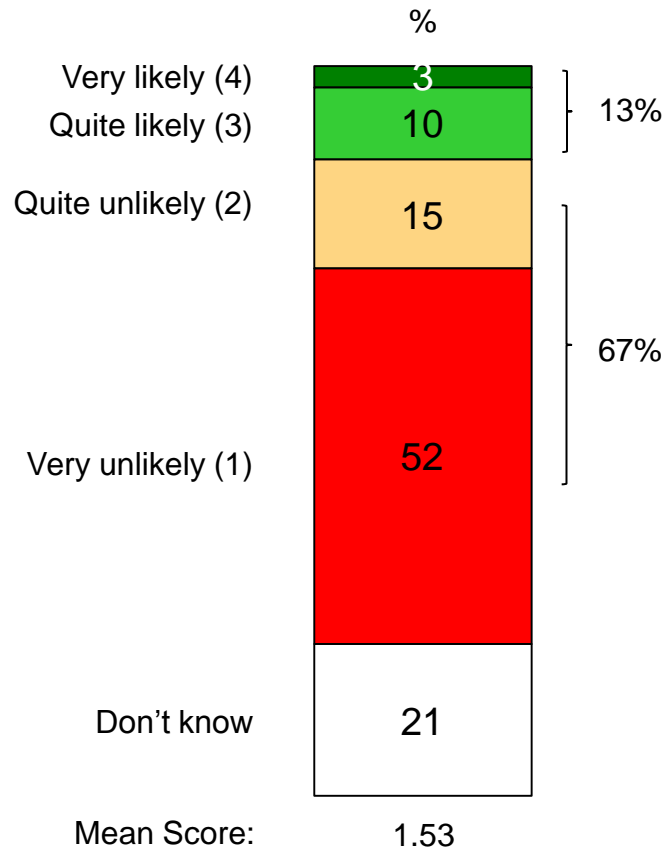


- Of those viewing bills online, four in ten (39%) have switched to receiving their bills directly online, a significant increase from 2008.
- Those most likely to have switched are male (43%), aged 25-34 (44%) and those resident in Dublin (50%).
- There are also differences between SEG with 46% of ABC1s and 28% of C2DEs having made the switch.
- Users of other service providers are also more likely to have switched (43%).

() 2008

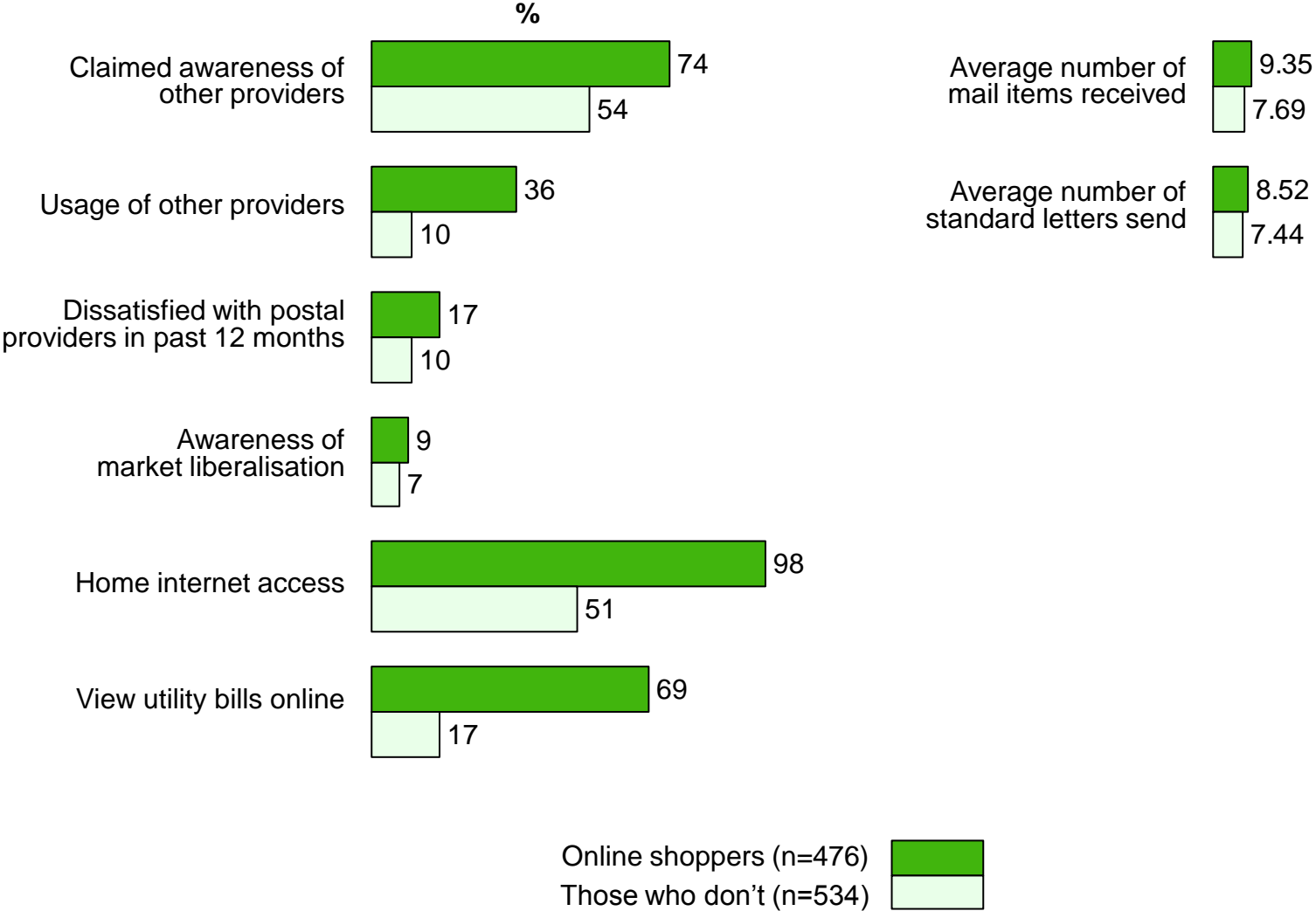
Likelihood of switching transaction type mail online

Q. How likely are you to switch any of your transaction type mail to being delivered online over the next 12 months?



- Those most likely to switch transactional mail online over the next 12 months are aged 25-34 (18%), ABC1s (17%), have been dissatisfied with the postal service (17%) and currently shop online (24%).
- Those least likely to switch are aged 65+ (85%), be living in Dublin (71%), C2DEs (71%), have low volume of mail delivered to them (72%), and do not have internet access (80%).
- Among those who are viewing bills online but have not switched, 22% feel it is quite or very likely they will switch, with 20% saying it is quite unlikely and 37% saying it is very unlikely they will switch.

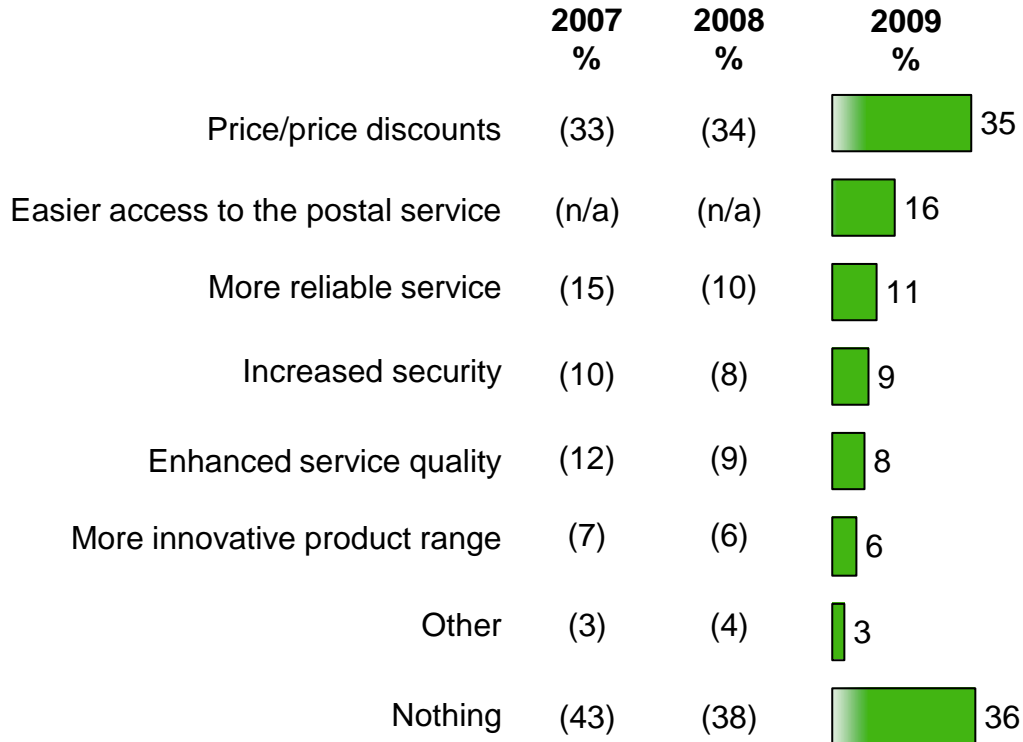
Online shoppers versus those who don't – a comparison



Future Requirements from Postal Service

Factors that would increase usage of postal services

Q. What factors if any, would result in you increasing your usage of postal services?



More competitive prices, easier access and improved reliability are the main factors that would increase usage of postal services.

Those aged between 25 – 49, those living in Munster and ABC1s mention price discounts as the main factor which might result in increasing their usage of postal services.

Dublin respondents (24%) want easier access to the postal service.

Summary

- There has been a claimed decrease in the volumes of mail received by households in Ireland in 2009, reflecting trends that were identified also in the business survey. Dublin based respondents claim to receive the largest amount of mails, along with those in the higher socio economic (ABC1s) grouping.
- An Post is by far the main postal provider that delivers to their households, with few demographic differences evident.
- The amount of personal mail received has decreased substantially this year (30% claiming it has decreased), and there has been no great change in the amount of mail received from businesses.
- There has been a decrease in the amount of addressed direct mail received, although nearly half (45%) claimed an increase in unaddressed direct mail.
- Volumes of mails received as a result on online transactions has also risen this year, and has been largely driven by ABs and residents of Munster.
- There has been a decrease in the number of standard letters sent by Irish households in 2009, and again it is ABC1s who are most likely to be larger senders of mail. An Post accounts for the vast majority of mail items sent, particularly in terms of the letters segment of the market.
- In terms of packets and parcels, other service providers have a more significant presence, with 13% of those sending packages and 15% of those sending parcels at least considering other service providers.

- Awareness of other service providers is growing steadily, with nearly two thirds (63%) claiming to be aware of other providers.
- Of those aware, one in four claim to have used other providers over the past 12 months. Claimed usage was higher among residents of Leinster (29%) and ABC1s (32%).
- Among those aware of other providers but not currently using them, there were a number of barriers identified; Perceived inconvenience (and a lack of accessibility), a lack of information on alternative companies, no real requirement and the perceived expense were all cited.
- Respondents were generally satisfied with various elements of An Post's national post service, although one in eight (13%) expressed dissatisfaction with the overall cost of postal services with An Post.
- One in eight were dissatisfied with some element of the postal service over the past twelve months, with the main causes of dissatisfaction being delivery related (*lost* items in particular has seen a significant increase). Other factors included *Late arrivals*, *unreliable* service and *damaged* mail).
- The vast majority of issues that caused dissatisfaction related to An Post.
- Of those who were dissatisfied, one in three (34%) made a formal complaint, which was a higher incident rate than among businesses.
- Of those who chose not to complain, the main reasons were apathy (felt it would be a waste of time), lack of time and confusion about whom to complain to. This third reason was cited by one in six of these respondents, and may well be an area that could be improved upon by postal operators.

- Just under one in four (23%) were dissatisfied with the outcome after making a complaint, indicating a large shift from 2008, when 62% were dissatisfied with the outcome. Indeed, one in three (31%) claimed they were very satisfied with the outcome this year.
- When a hypothetical scenario of a second class mail service was outlined to respondents, two fifths claim they would send a high proportion of their mail using such a service, with only one in four (26%) ruling out availing of this service whatsoever.
- Nearly three quarters (73%) have home access to the Internet, with just under half (47%) having shopped online in the past twelve months.
- Of those who have shopped online, one in three have had items delivered from another service provider, compared to 55% who have had items delivered by An Post, indicating a significant narrowing of the gaps in the past twelve months.
- Four in ten (41%) view transactional type mail online compared to 27% last year, with residents of Dublin (46%) and ABC1s (58%) driving this figure.
- Of those viewing these bills online, 39% have switched from having them delivered by Post to have them delivered online.

- There are quite apparent differences between online shoppers and those who do not; Online shoppers tend to receive and post more mail, are more aware of other service providers (and more likely to use them), and are more likely to view transactional mail online.
- When asked what factors would increase their usage of the postal service, 35% mention price/price discount, followed by one in six mentioned easier access. However, over one third (36%) feel that there are no factors that would increase their current usage of the postal service.