MCA Market Research on Postal Services

Based on a household perceptions survey

MCA reference: MCA/S/26-5921

May 2026

Purpose and methodology

Purpose

To present survey findings on usage of postal services by households in Malta and to outline factors influencing perceptions and decisions regarding the use of these services.

- Main factors and considerations:

  ✓ Service usage and volumes – letter mail, registered mail and parcel post;

  ✓ Universal Service Obligation – awareness, acceptable lead time and perception on delivery frequency;

  ✓ International parcels/packages – volumes and commonly used service providers;

  ✓ Parcel lockers and parcel forwarding services – awareness and extent of use;

  ✓ Quality of service – overall performance and customer experience.

Methodology

PKF Malta carried out fieldwork on behalf of MCA between November and December 2025		
Fieldwork	Sample Design	Statistical Parameters
• Data collection by type of medium response: • Online – 244 (61%) • Telephony – 156 (39%) • One person per household was interviewed, aged 18+.	• Stratification of target responses: → Age composition aligned with Maltese population → Malta's six geographical regions → Socio-economic categories of the Maltese population	• 400 net valid respondents, randomly selected; • Margin of error +/- 5.0% at 95% confidence interval; • Any refusals / incomplete surveys were removed and replaced with new responses.

Key insights

Key insights (1 of 5)

Outgoing and incoming addressed letter mail

- More household respondents reported that the weekly volume of addressed letters received has decreased over the past twelve months (35% in 2025 vs 28% in 2023).
- 29% of household respondents sent fewer addressed letters in 2025 than was the case in the previous twelve months (26% in 2023).
- The increase in the number of household respondents sending fewer addressed letter mail is mainly attributable to a shift towards digital communications platforms (86%), voice communication services (34%) and social media (27%).
- 35% of household respondents reported sending registered mail in the past 12 months, up from 33% in 2023.

Use of Postcode

- 73% of household respondents always write down the postcode when sending an addressed letter, up from 65% in 2023.

Key insights (2 of 5)

Domestic Parcel Mail

- A larger number of surveyed respondents reported an increase in the volume of parcels received from local retailers when purchasing goods online over the previous twelve months (25% in 2025 vs 7% in 2023).
- The most common items purchased online from local retailers include clothing and accessories (50%) and essential items and other daily needs (39%).

International Parcel Mail

- The number of respondents saying they received more parcel mail from international senders over the previous twelve months has increased by 10-percentage points, reaching 48% in 2025.
- MaltaPost emerged as the operator that delivers most parcels to households (for 88% of respondents) followed by DHL (for 54% of respondents) and FastDrop (for 29% of respondents)[1].

[1]Respondents could select more than one delivery operator - percentages do not represent exclusive use of any single provider.

Key insights (3 of 5)

Parcel Lockers and Parcel Forwarding Services

- 24% of respondents reported used a parcel locker[1] over the previous twelve months, up from 16% in 2023.
- MaltaPost's parcel lockers were used 63% of respondents on an exclusive basis, while 20% reported exclusive use of DHL's lockers. A further 17% reported using parcel lockers from both providers.
- A larger share of household respondents indicated that they made use of parcel forwarding services[2] (11% in 2023 vs 19% in 2025). MaltaPost's *'SendOn'* is the most commonly used.
- Respondents opted for parcel forwarding services for more flexible delivery options (23% in 2025, 5% in 2023), and /or because of a cheaper price offered by the vendor (18% in 2023 vs 29% in 2025).

[1]A parcel locker is a secure, self-service collection point where people can pick up their parcels at their convenience using a unique access code.

[2]Parcel forwarding is a service that gives an international address for shipments when the sender of the parcel does not ship to Malta. The service provider then forwards the items from its warehouse to the final recipient in Malta.

Key insights (4 of 5)

Outgoing Parcel Mail

- More households have opted for other postal service providers, other than MaltaPost, when sending or returning a parcel item (4% in 2023 vs 26% in 2025).
- Four in five of the households that made use of MaltaPost's parcel services were satisfied when they sent/returned a parcel item, an increase from 72% in 2023 to 82% in 2025.

Universal Postal Service

- 63% of surveyed households indicated that they were aware of the term "Universal Postal Service".
- 85% of those aware perceive the access of the universal postal service to be important.
- While the share of respondents considering a next-day lead time acceptable declined to 41% in 2025 (from 46% in 2023), acceptance of two- and three-day lead times increased by 4 and 2 percentage points respectively.

Key insights (5 of 5)

MaltaPost Office

- Over the previous 12 months, 69% of respondents visited a MaltaPost branch office, while 14% visited a MaltaPost sub-post office.
- Primary reasons for visiting MaltaPost's offices: collect a parcel (37%), purchase stamps (15%), pay bills (11%).

MaltaPost Customer Care

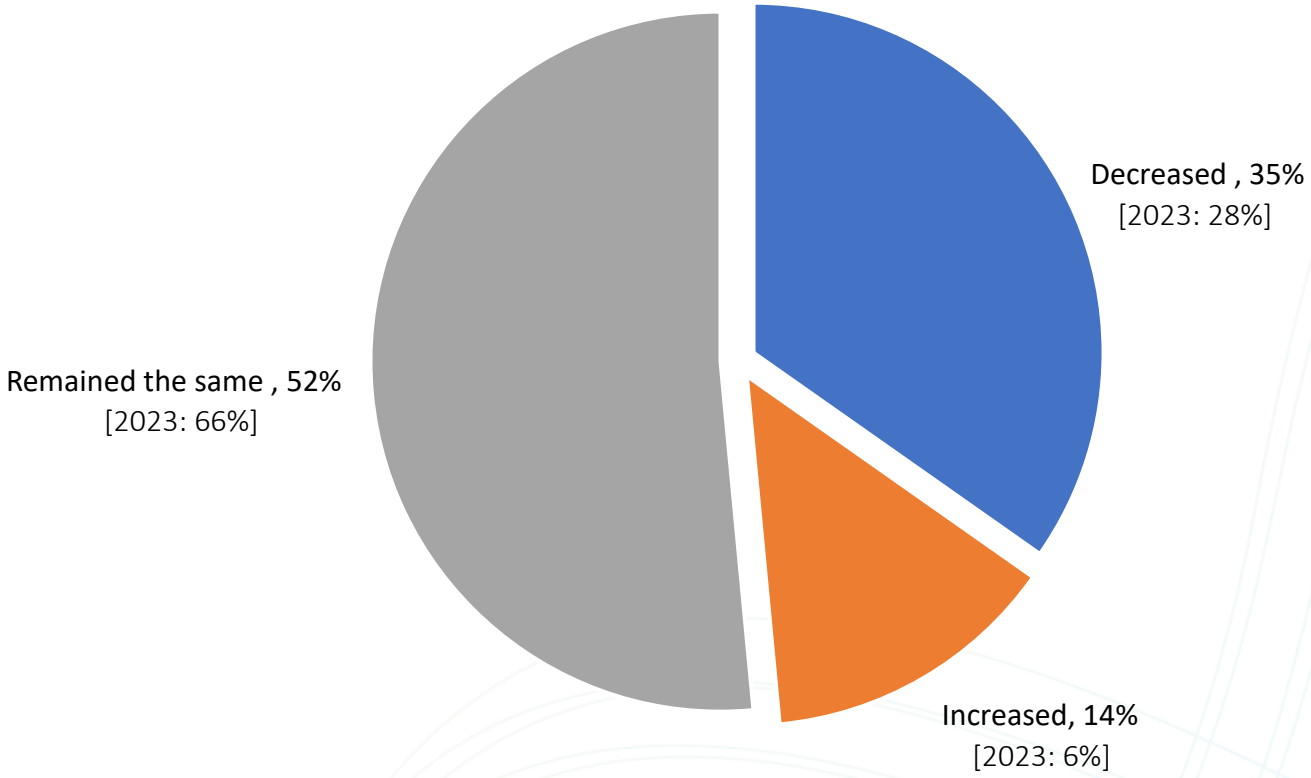
- Over the past 12 months, 27% of interviewed households contacted MaltaPost (15% in 2023).
- Main contact reasons: parcel delivery status (53%), product & service information (29%), filing a complaint (19%).
- Most common complaints: misdelivery (43%), delay in delivery (29%) and behaviour of postal personnel (24%).
- 38% of respondents are satisfied or very satisfied with MaltaPost's complaint handling, while a further 38% express a neutral view.

Addressed Letter Mail

Addressed letter mail – incoming

Volume trends for addressed letter mail items received by surveyed households

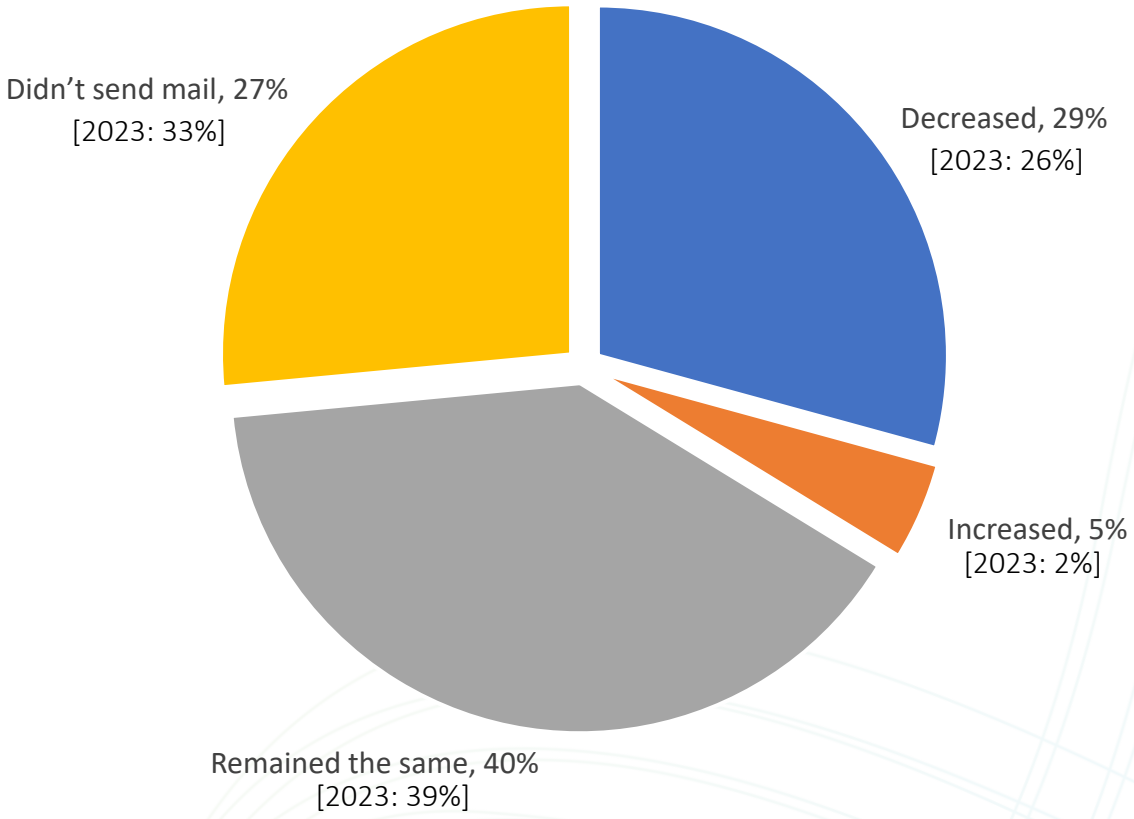
Total number of households respondents - 400



Addressed letter mail – outgoing (1)

Volume trends for addressed letter mail items sent by surveyed households

Total number of households respondents - 400



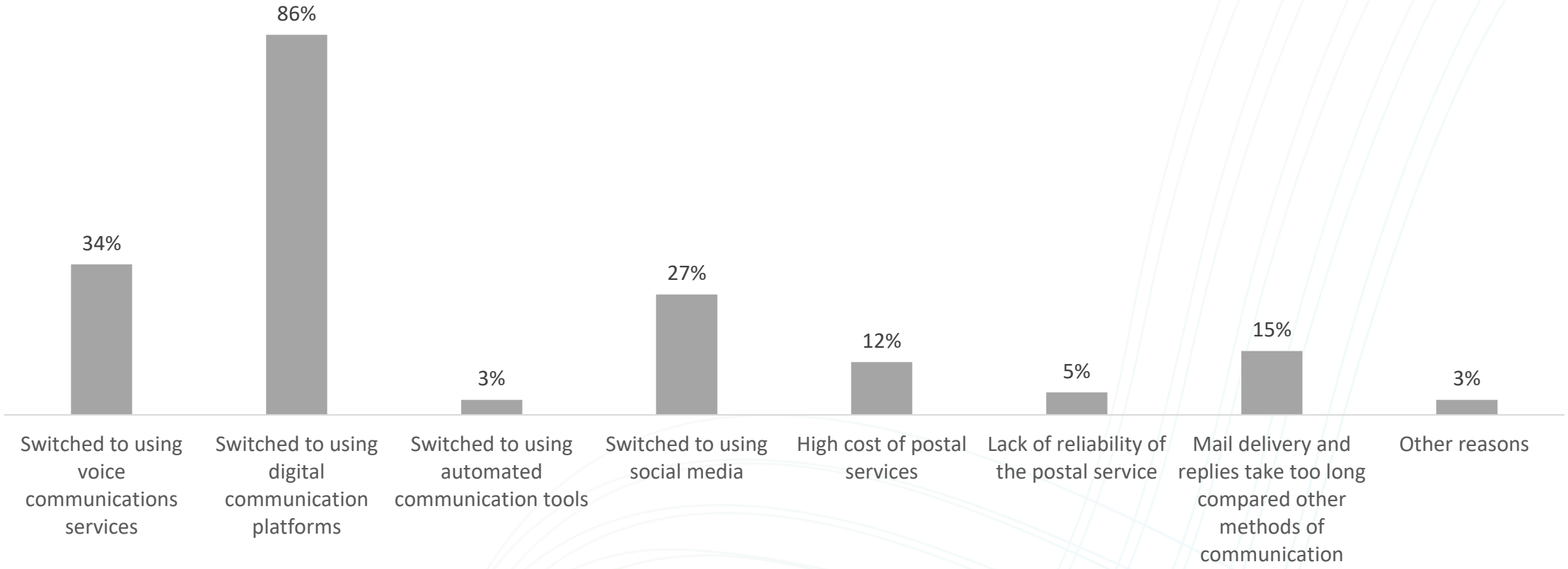
Addressed letter mail – outgoing (2)

Perceived reasons for declining addressed letter mail volumes over the past 12 months

Households reporting decline in outgoing addressed letter mail – 117

Respondents could select multiple options

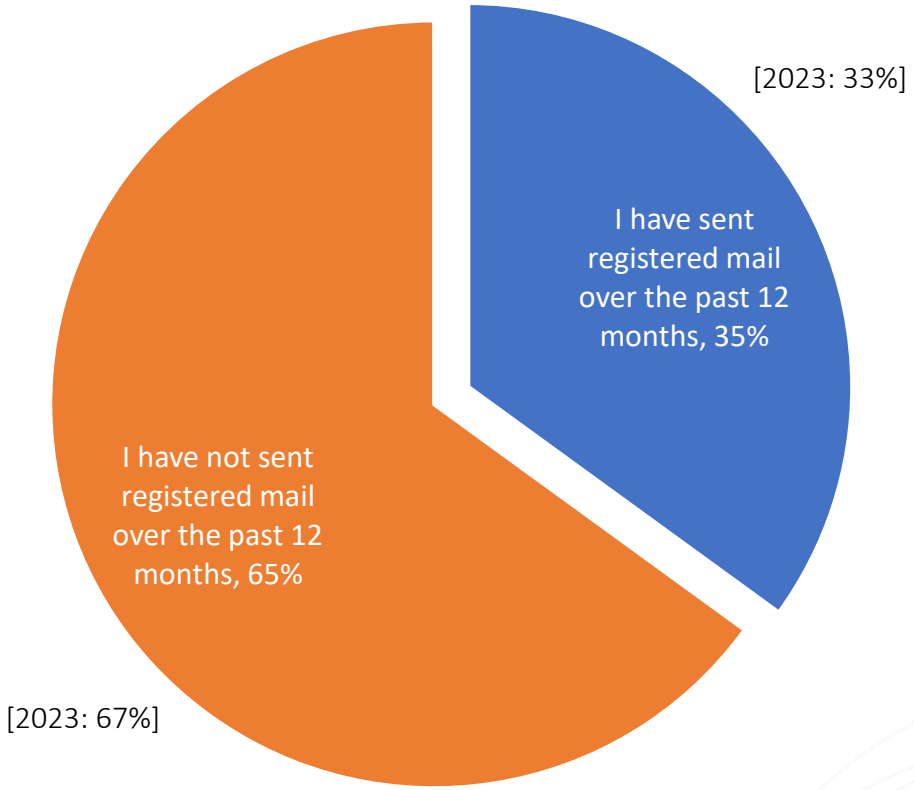
This question was included for the first time in the 2025 survey; therefore, no comparisons with previous years are available



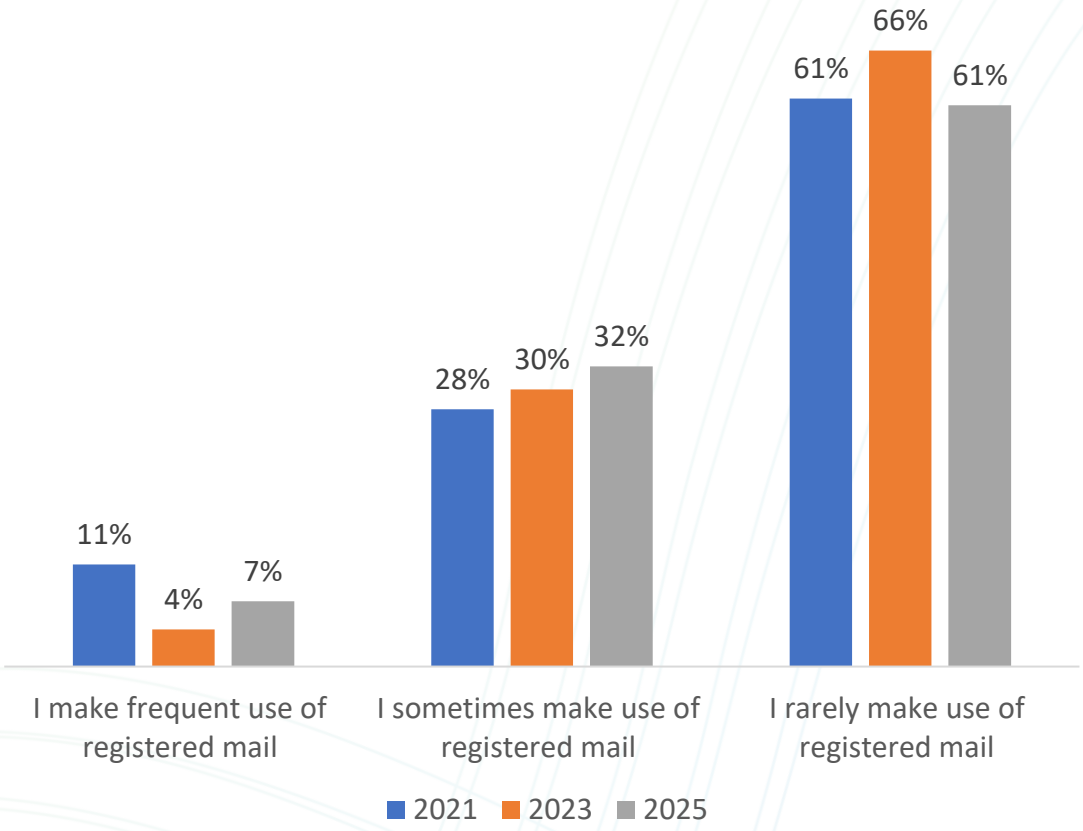
Addressed letter mail - registered

Use of registered mail – previous 12 months

Total number of survey household respondents - 400



Number of users sending registered mail – 142

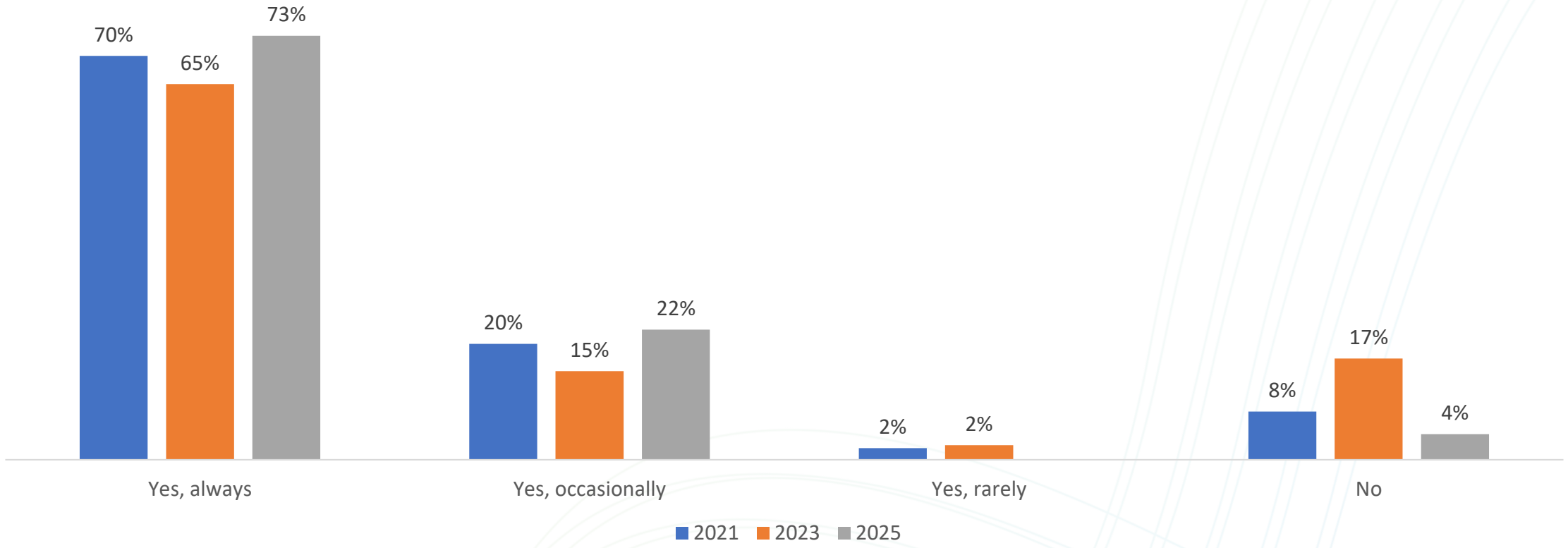


Use of Postcode

Extent of postcode use when sending an addressed letter

Households that sent addressed letter mail – 294

2023 "Don't know" responses have been excluded to ensure consistent comparisons.



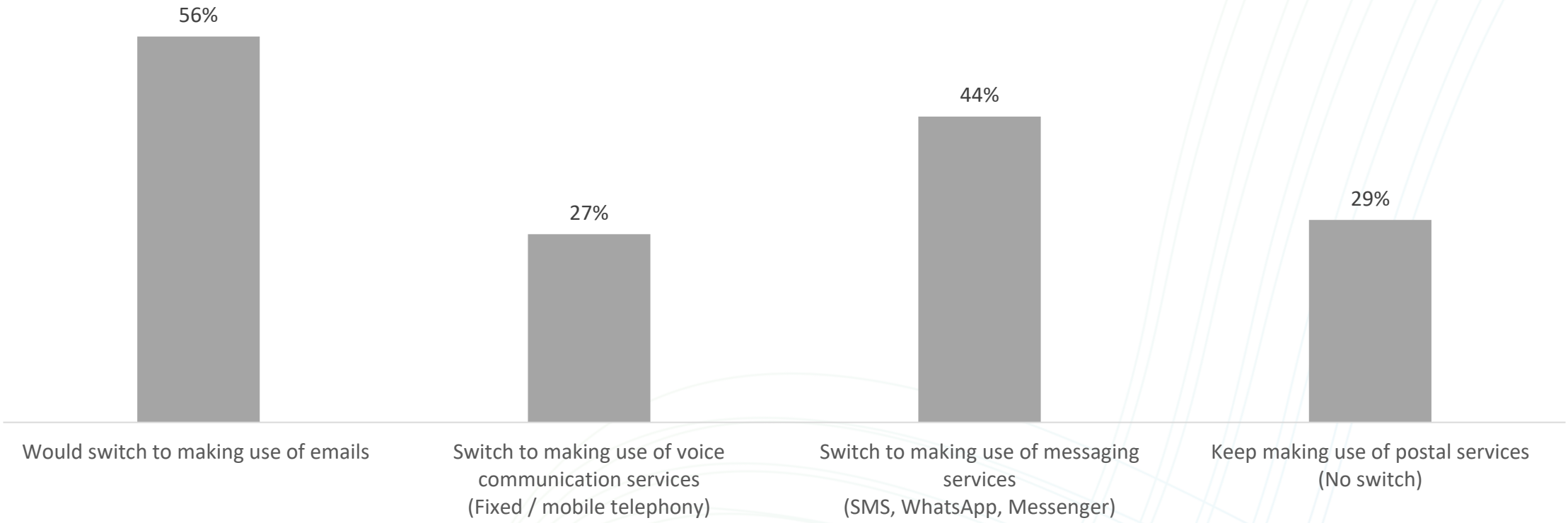
Propensity to switch to non-postal services

Respondents' willingness to switch to non-postal alternatives in the event of a 10% increase in the cost of a 50g addressed letter

Households sending addressed letter mail – 294

Respondents could select multiple responses

This question was included for the first time in the 2025 survey; therefore, no comparisons with previous years are available



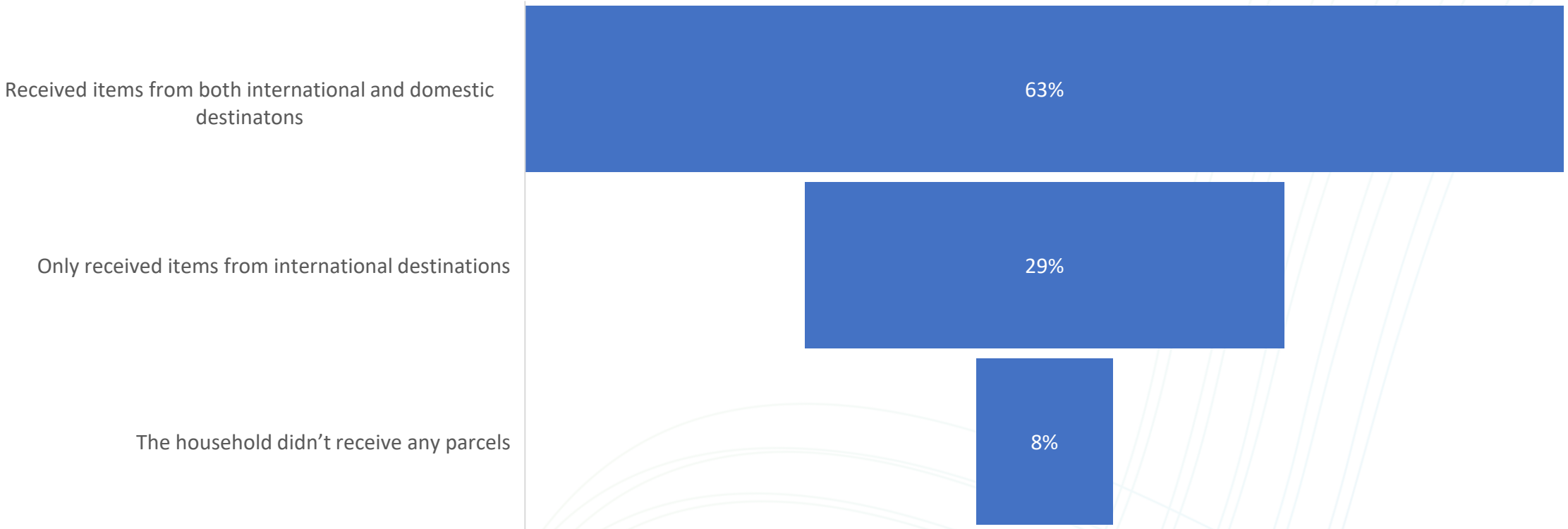
Parcel Mail

Incoming parcel mail volumes – Overall (1)

Share of respondents receiving incoming parcel mail from domestic and international senders

Number of surveyed households – 400

An overall assessment of international and domestic mail volume trends

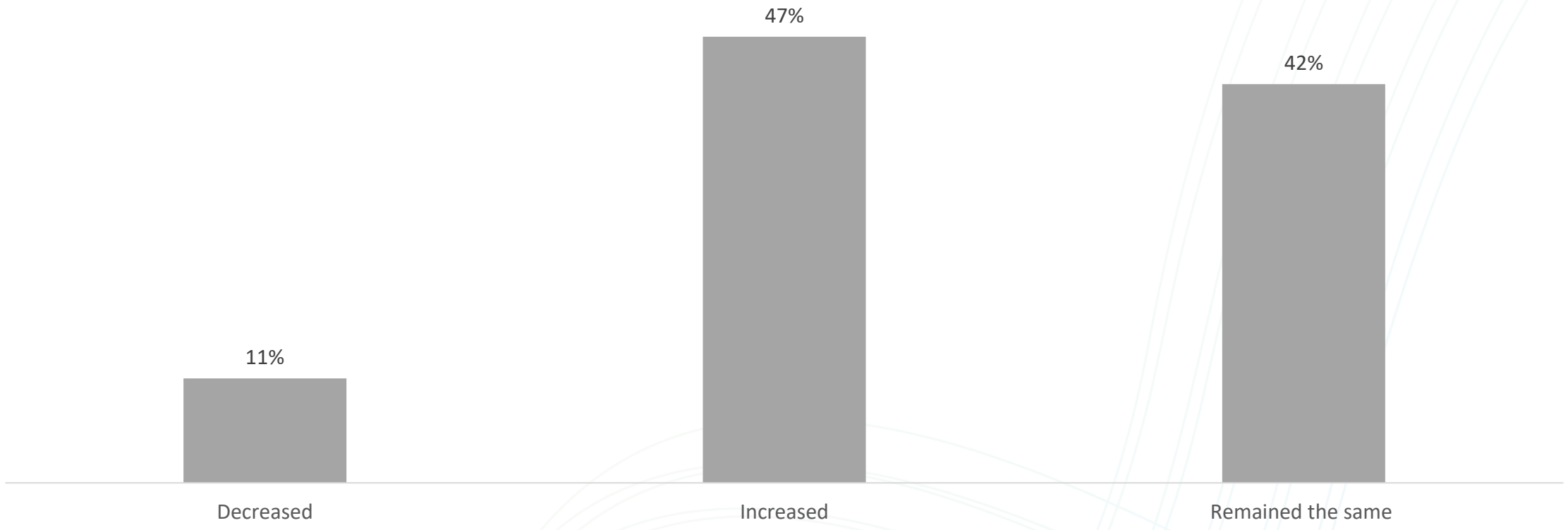


Incoming parcel mail volumes – Overall (2)

Volume trends in the previous twelve months for incoming parcel mail - domestic and international

Households reporting receiving parcel mail – 367

An overall assessment of international and domestic mail volume trends



Incoming parcel mail volumes – Overall (3)

Reasons attributed for the increase in respondents for incoming parcel mail in the previous 12 months

Households reporting an increase in received parcel mail – 181

Respondents could select multiple responses

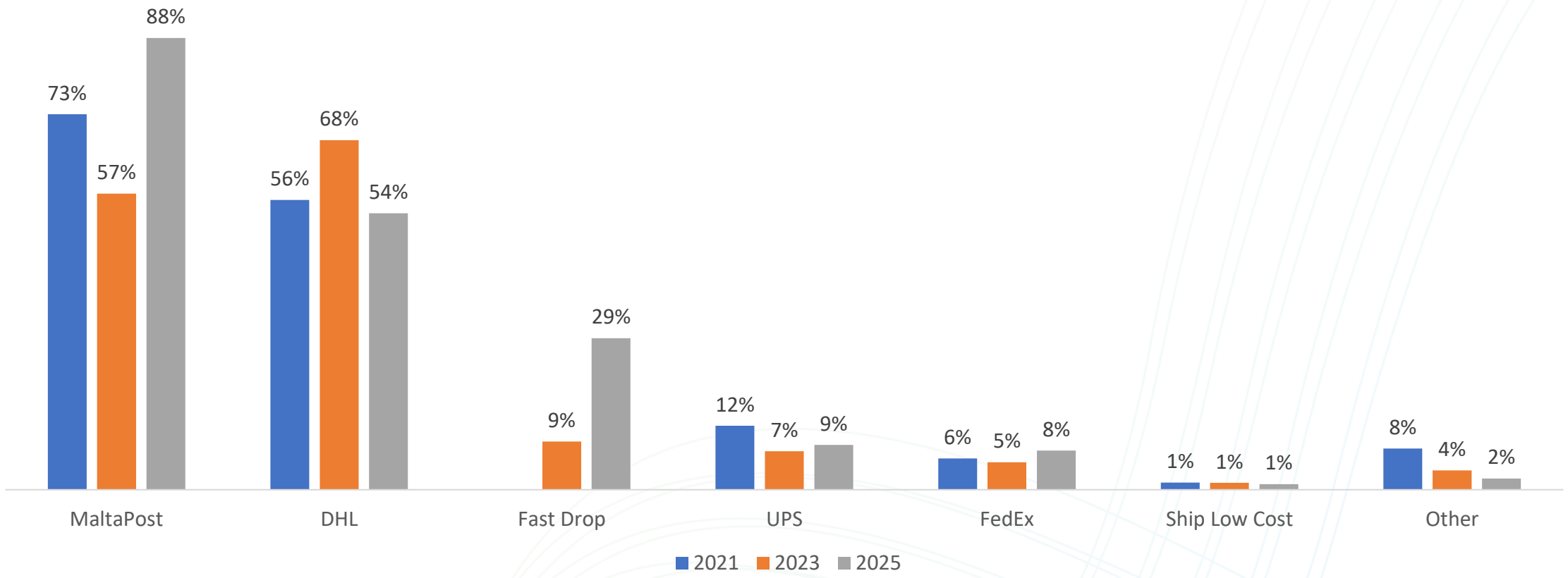
An overall assessment of international and domestic mail volume trends is being presented for the first time in this report, to provide additional context alongside the domestic and international breakdowns.

Incoming parcel mail volumes – Overall (4)

Delivery of goods ordered from national and international websites – by operator

Households reporting receiving parcel mail – 367

Respondents could select multiple operators

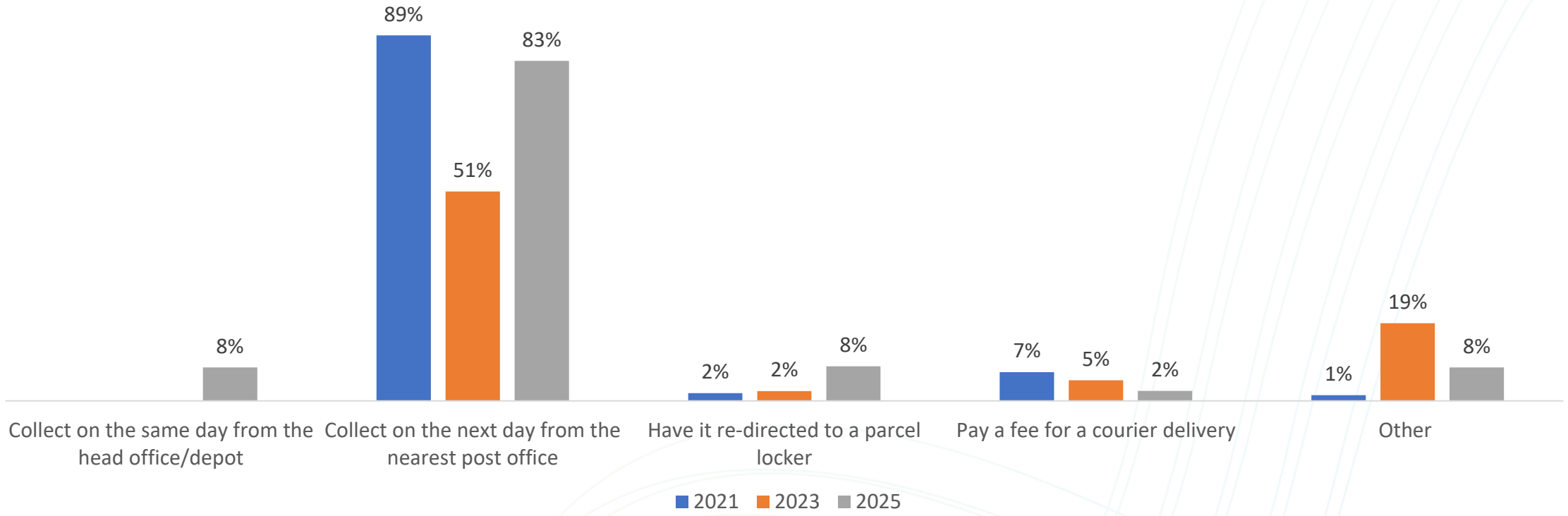


Incoming parcel mail volumes – Overall (5)

Preferred way to collect a parcel in case of a missed delivery

Households reporting receiving packets – 367

Respondents were allowed to select multiple options



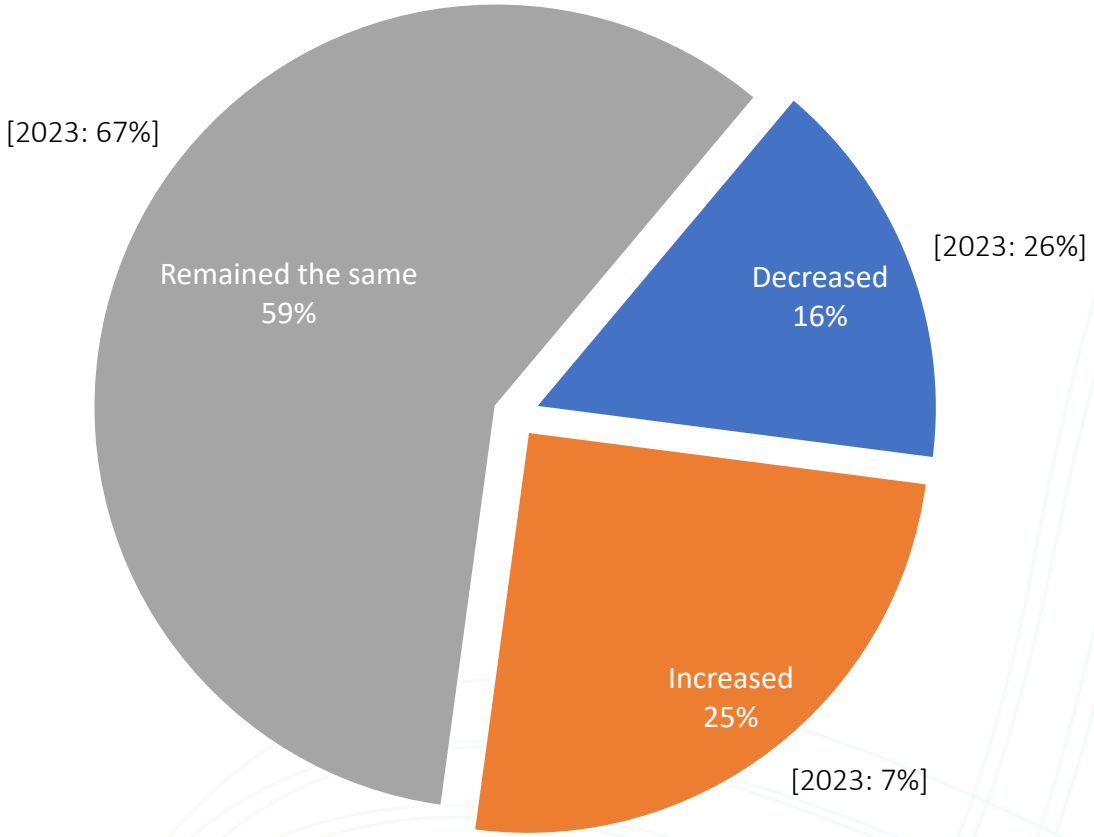
Options have been revised in 2025. "Collect on the same day from the head office/depot" was included for the first time in the 2025 survey. "Have it re-directed to a parcel locker" was also included for the first time – in previous years, this was listed under "Other".

Incoming parcel post: From domestic suppliers

Incoming parcel post – domestic (1)

Volume trends in the previous twelve months for incoming parcel post - domestic

Households receiving domestic parcel post (i.e., from orders placed on local websites) – 251



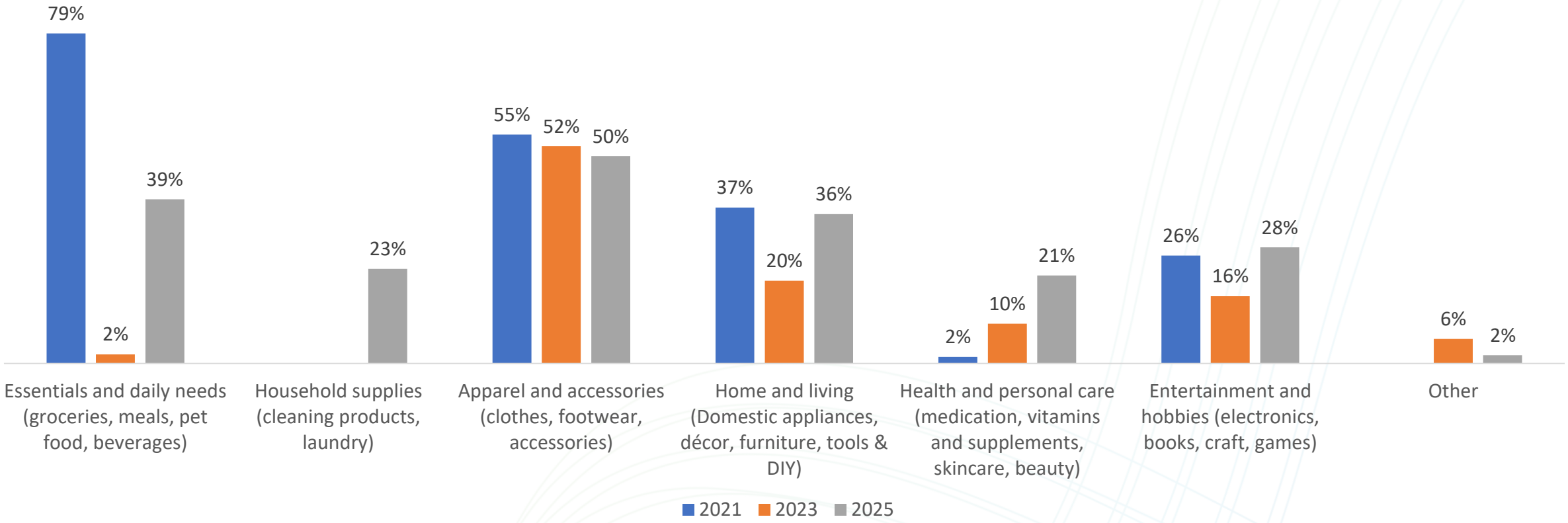
Incoming parcel post – domestic (2)

Profile of domestic parcel post

Households receiving domestic parcel post (i.e. from orders placed on local websites) – 251

Respondents could select multiple responses

The 2025 survey categories were revised based on popular opinions from previous years. For comparison purposes, results from earlier surveys have been re-categorized to align with the new 2025 categories.



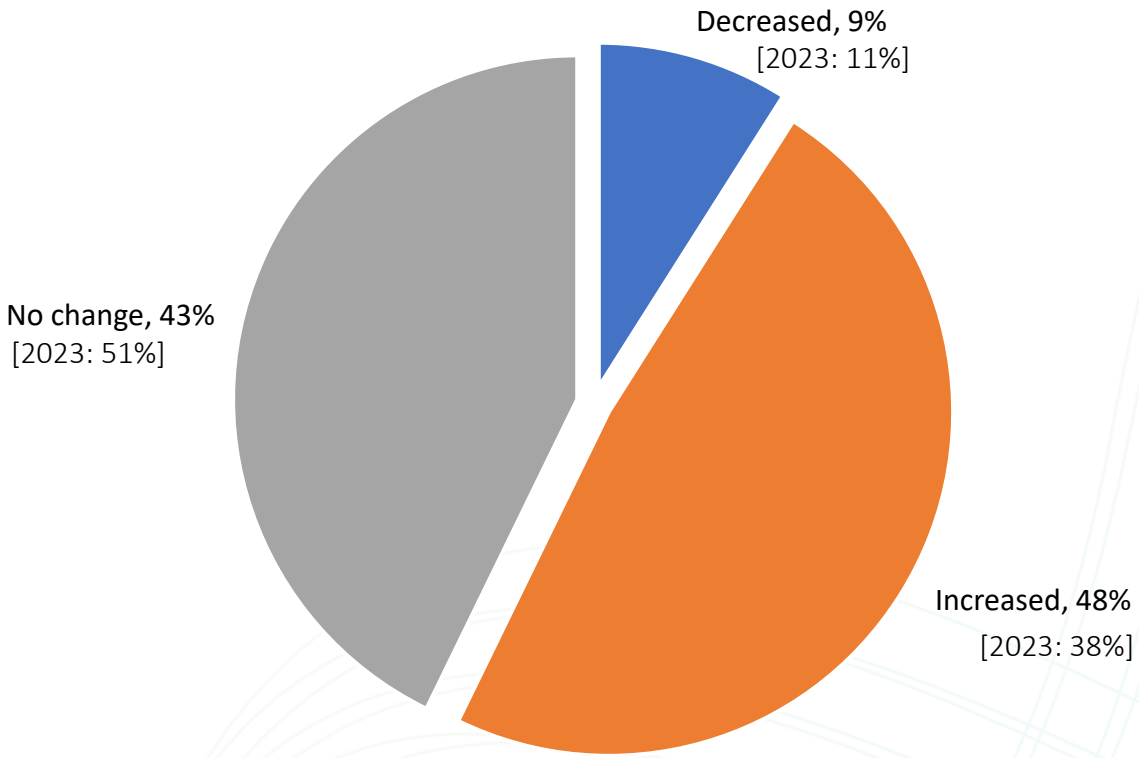
Incoming parcel post: From international suppliers

Incoming parcel post – international (1)

Volume trends in the previous twelve months for incoming parcel post – international

Households receiving international parcel post (i.e., from orders placed on foreign websites) – 367

This question was asked only to respondents who stated that their household receives parcel mail from international suppliers. Therefore, the results may also include households that receive parcels from domestic suppliers. The 2023 figures have been adjusted to ensure comparability with other years.

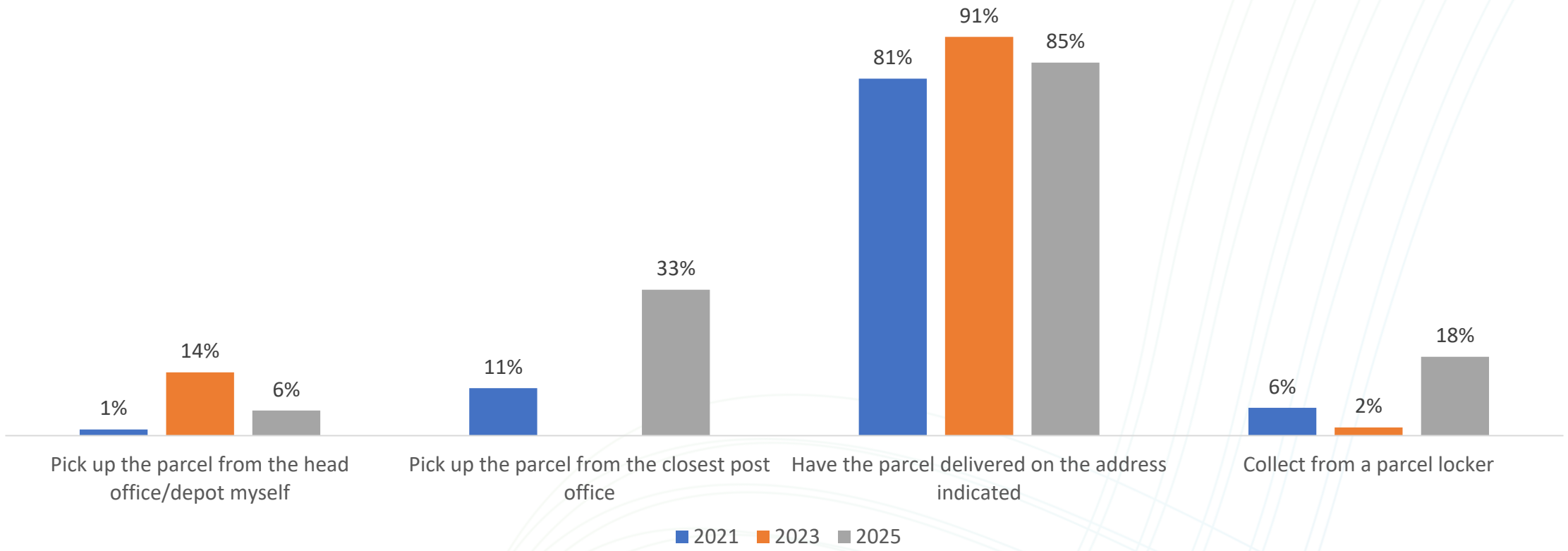


Incoming parcel mail – international (2)

Preferred way to receive international parcel post

Households receiving international parcel post (i.e., from orders placed on foreign websites) – 367

In 2025, respondents were asked to select their two most preferred methods, whereas in earlier years, they were asked to rank all listed options from 1 to 4. For comparative purposes, only the first two ranks from earlier years haven been used for this analysis

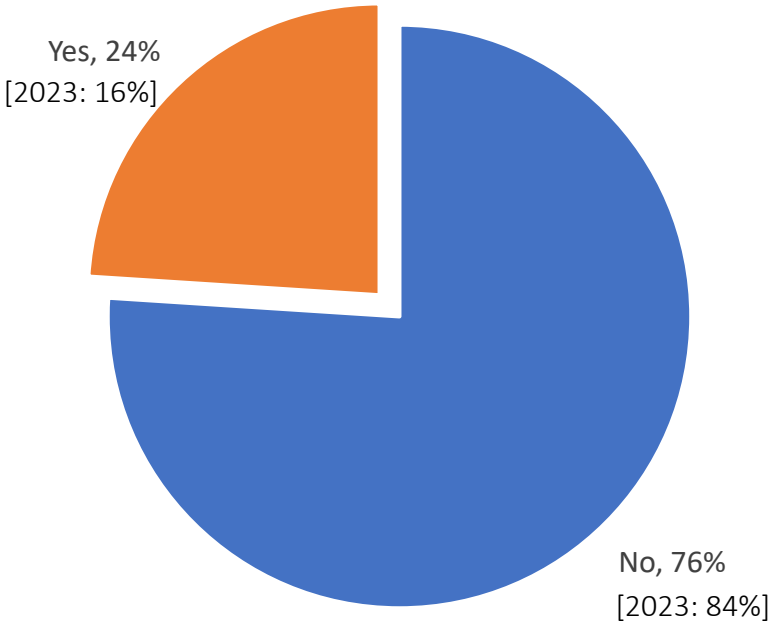


Parcel Locker and Forwarding services

Parcel Lockers

Use of parcel lockers

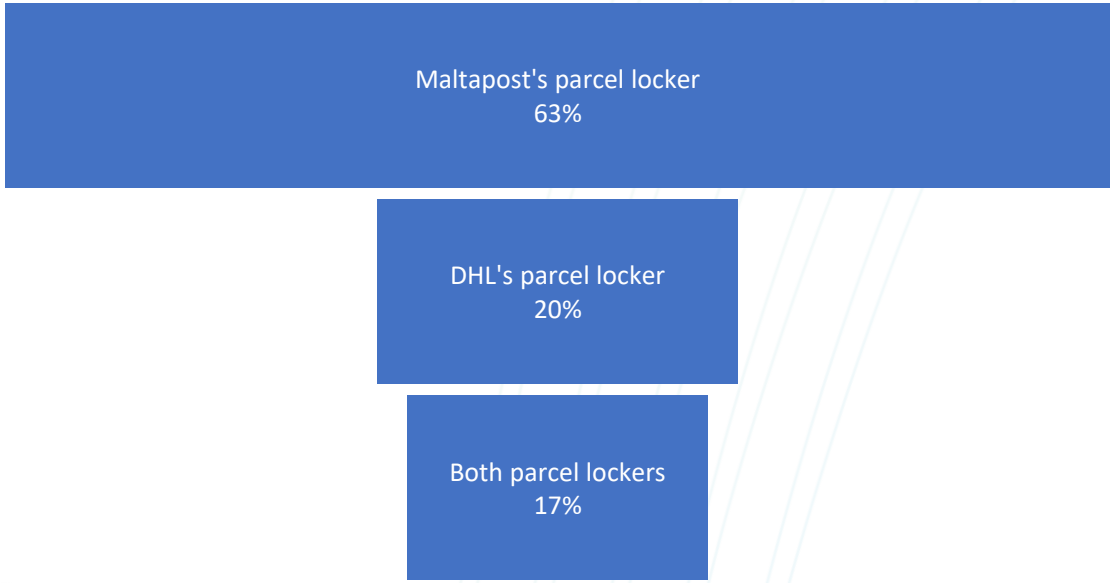
Households reporting receiving parcel mail – 367



Use of parcel lockers – by operator

Households making use of parcel lockers – 88

Per operator information was not assessed in earlier years



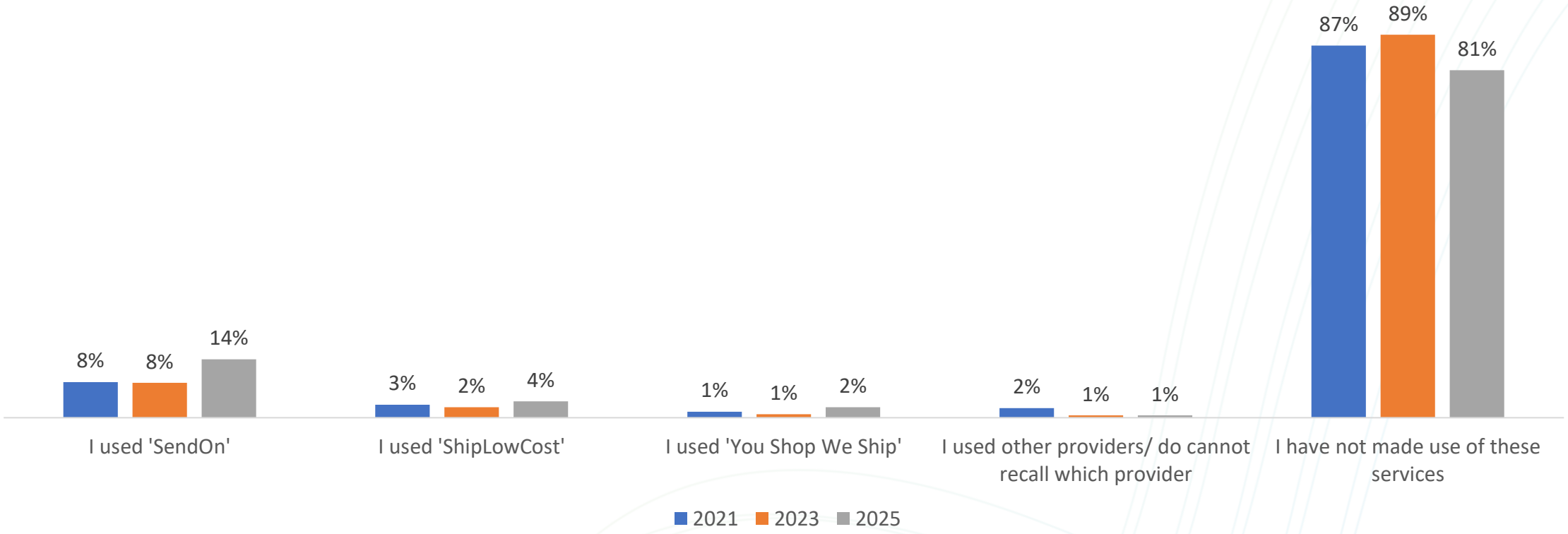
A parcel locker is a secure, self-service collection point where people can pick up their parcels at their convenience using a unique access code.

Parcel Forwarding Services (1)

Use of parcel forwarding services – by operator

Households reporting receiving parcel mail – 367

Respondents were allowed to select multiple options



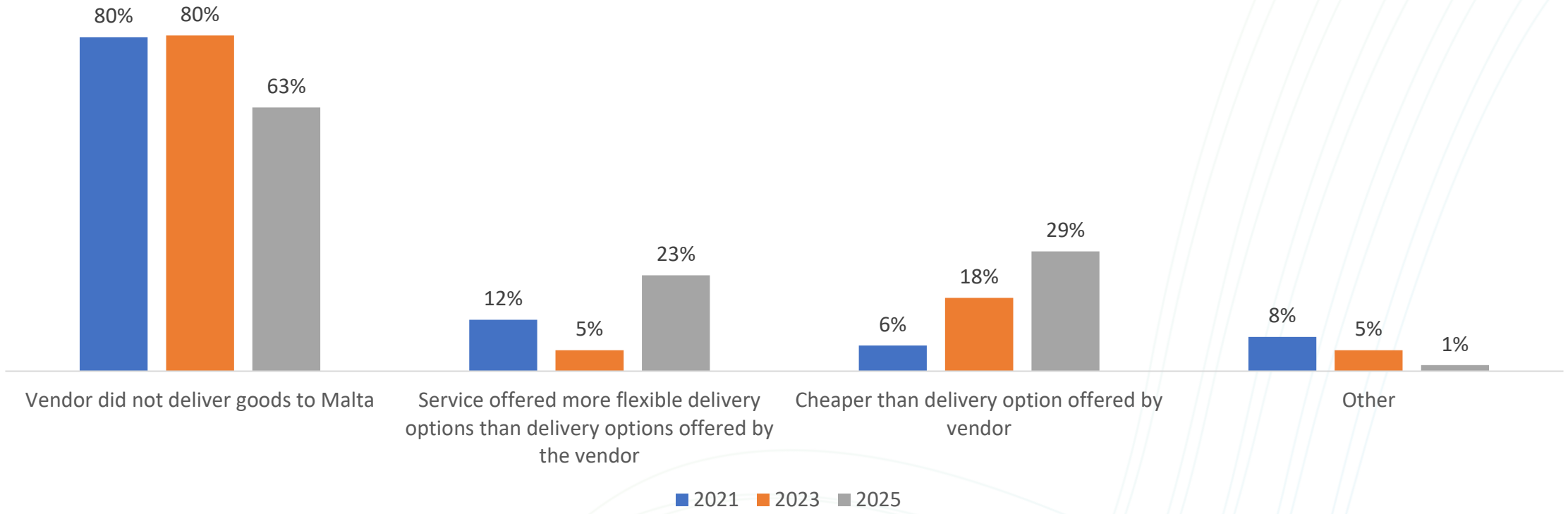
Parcel forwarding is a service that gives an international address for shipments when the sender of the parcel does not ship to Malta. The service provider then forwards the items from its warehouse to the final recipient in Malta.

Parcel Forwarding Services (2)

Reasons for use of parcel forwarding services

Households making use of parcel forwarding services – 70

Respondents were allowed to select multiple options



Parcel forwarding is a service that gives an international address for shipments when the sender of the parcel does not ship to Malta. The service provider then forwards the items from its warehouse to the final recipient in Malta.

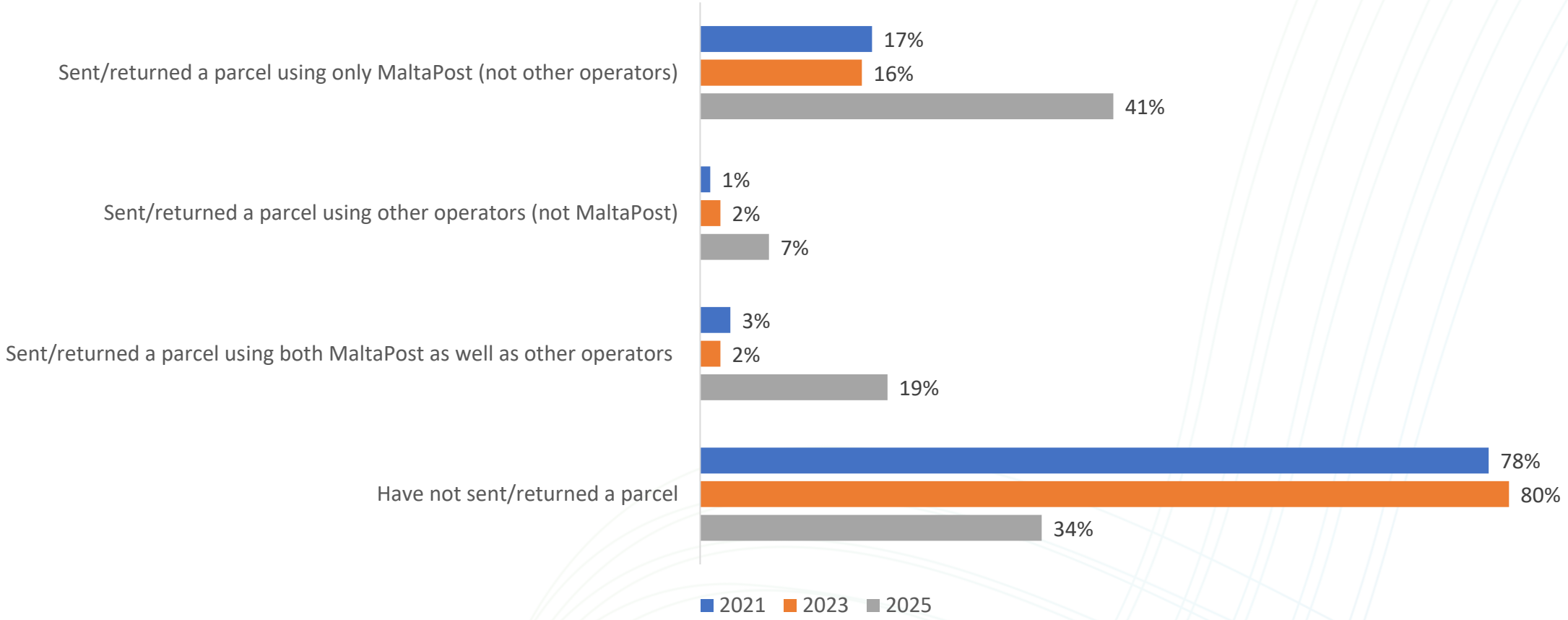
Outgoing parcel post

Outgoing parcel post (1)

Outgoing parcel post – by operator

Households sending / returning parcel post - 243

This question refers to sending/returning mail both domestically and internationally

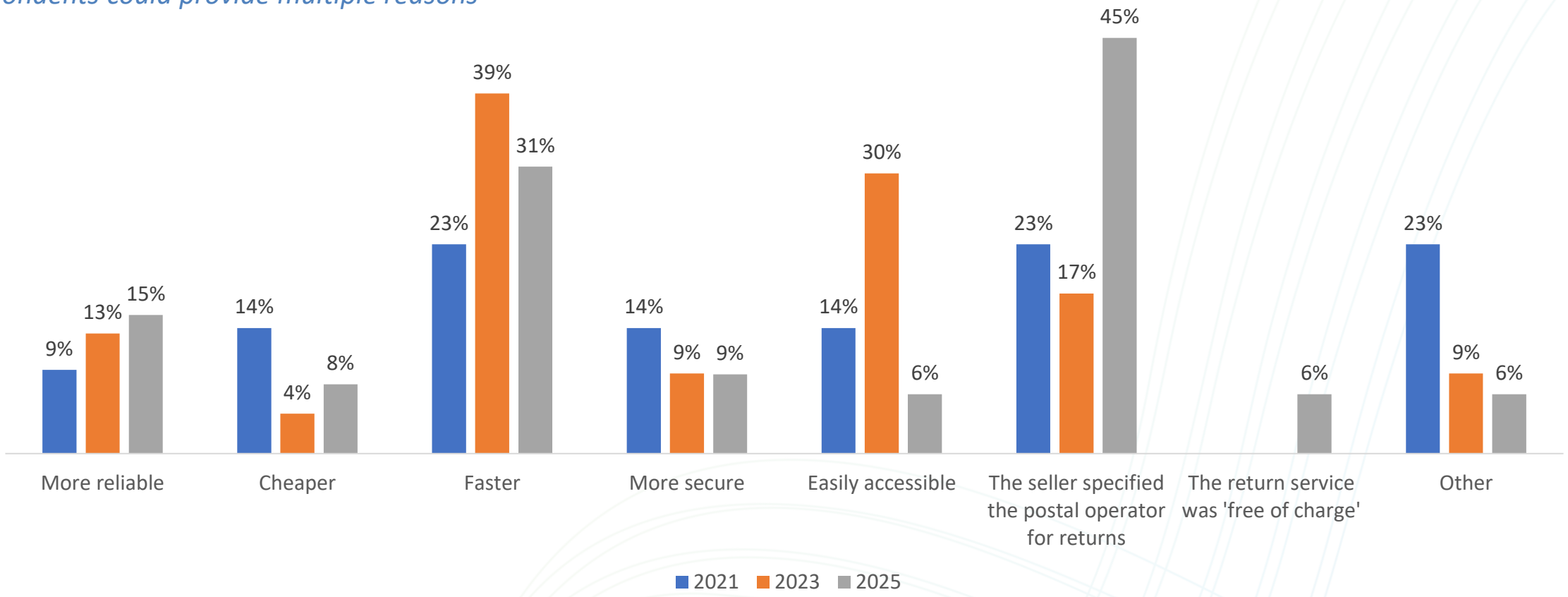


Outgoing parcel post (2)

Reasons quoted by household respondents for using alternative operators (excl. MaltaPost) to send / return parcel post

Households using other providers (excl. MaltaPost) to send/return a parcel – 93

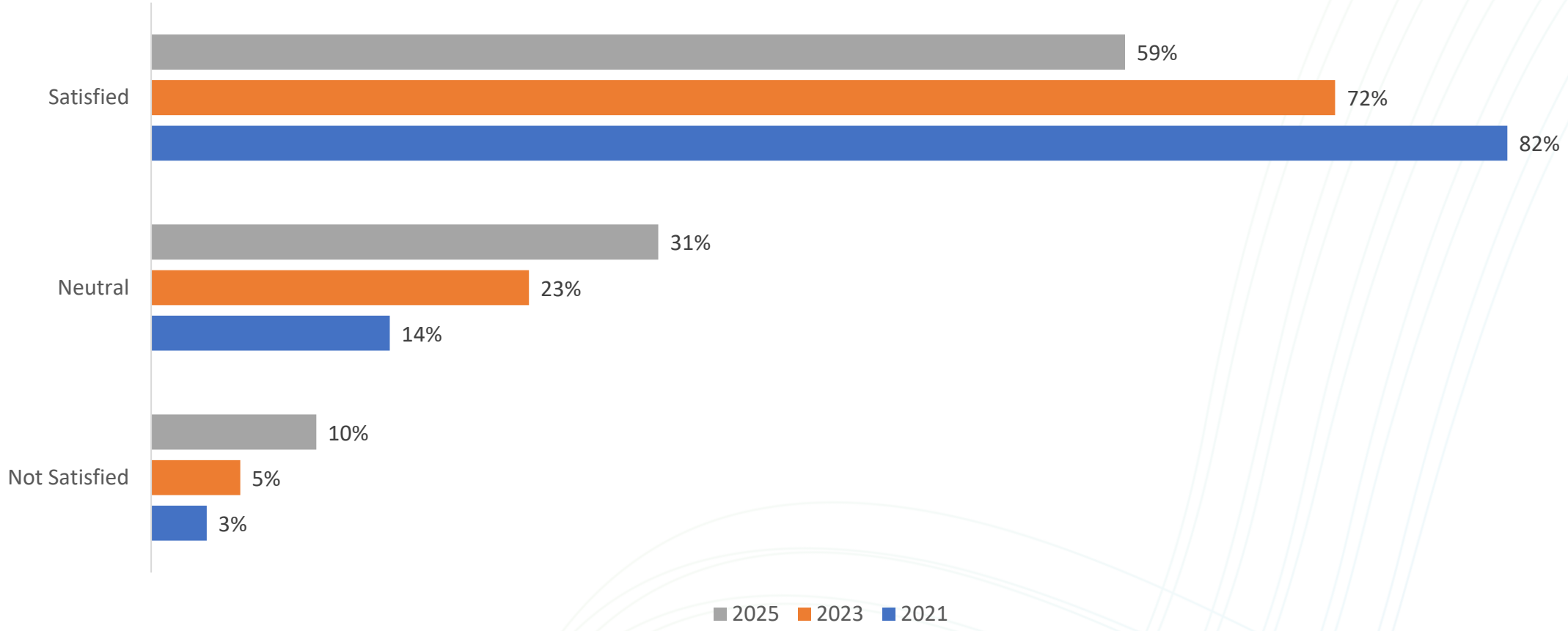
Respondents could provide multiple reasons



Outgoing parcel post (3)

Satisfaction with MaltaPost's international parcel post delivery service

Households that used MaltaPost for international parcel post delivery – 218



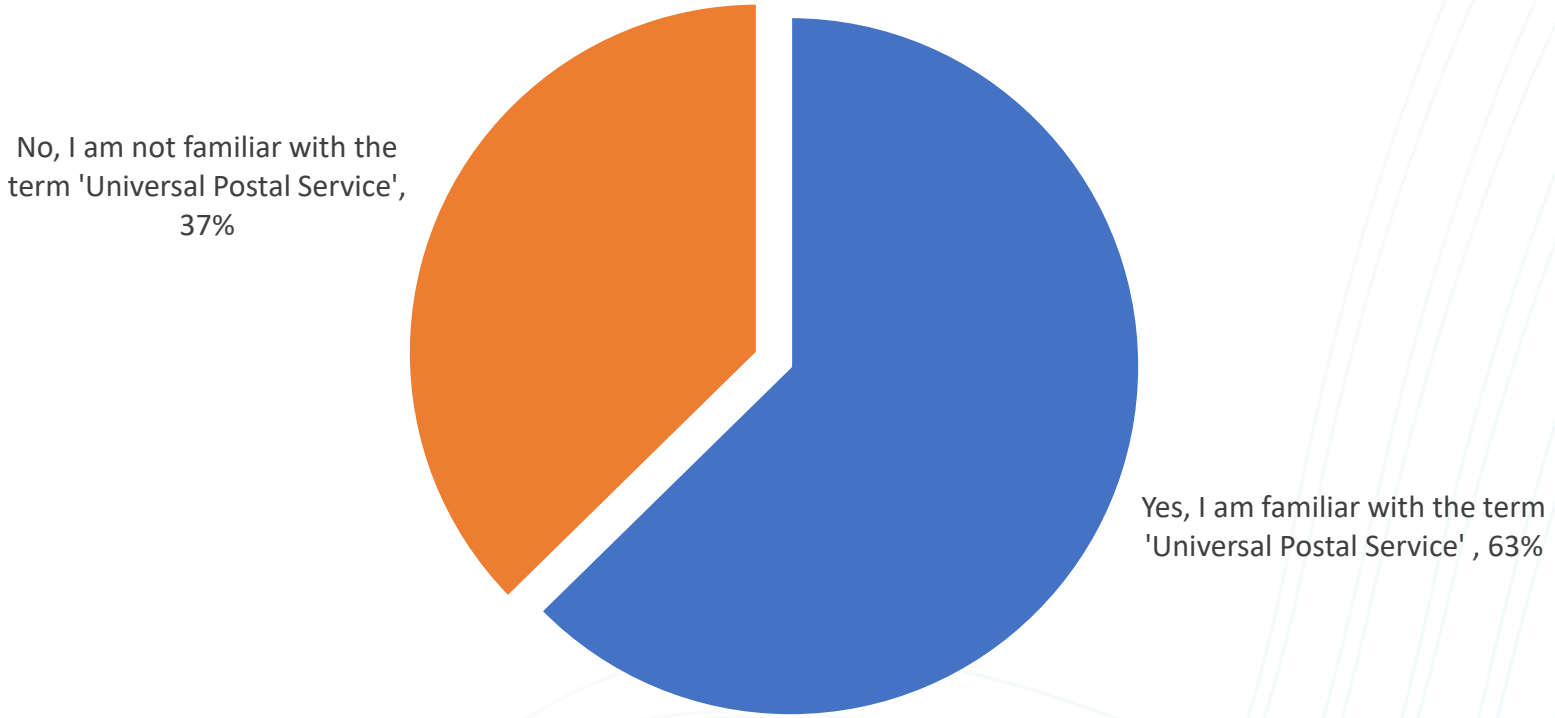
Universal Postal Service

Universal Postal Service (1)

Familiarity with the term ‘Universal Postal Service’

Number of households respondents to the survey – 400

This question was included for the first time in the 2025 survey; therefore, no comparisons with previous years are available



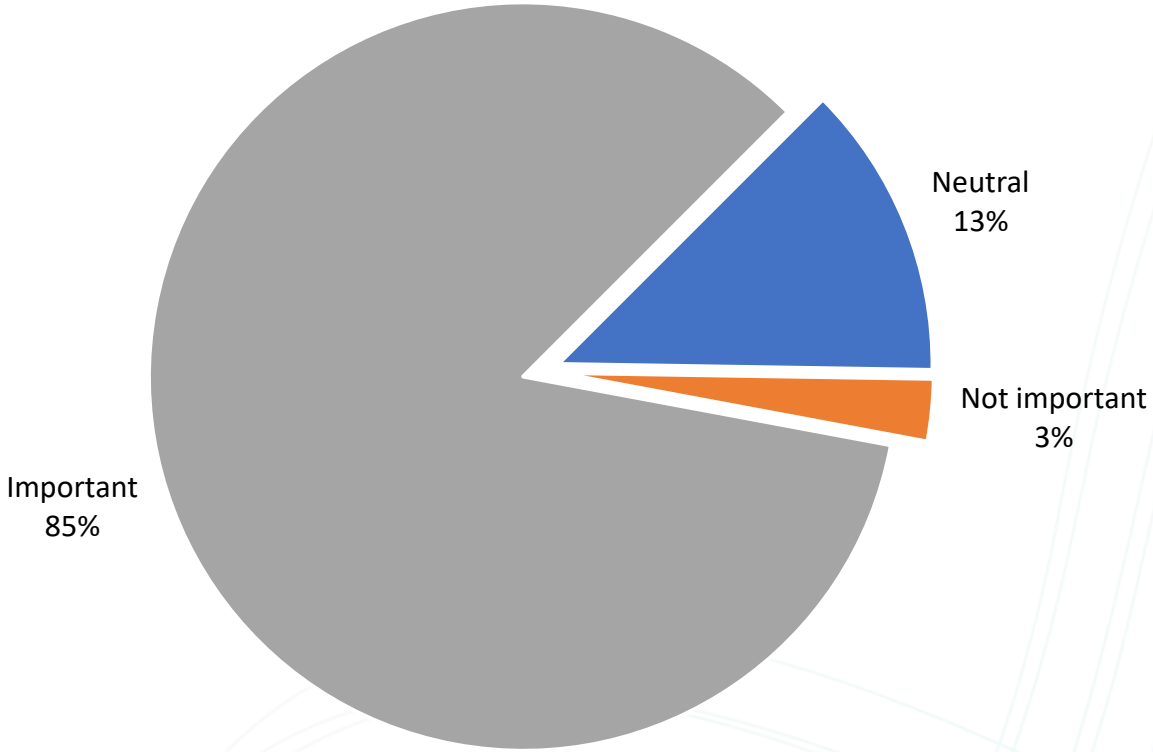
Letters, together with registered mail, bulk mail and also parcels, form part of the Universal Postal Service

Universal Postal Service (2)

Perceived importance of access to the 'Universal Postal Service'

Households aware of the scope of the Universal Postal Service – 149

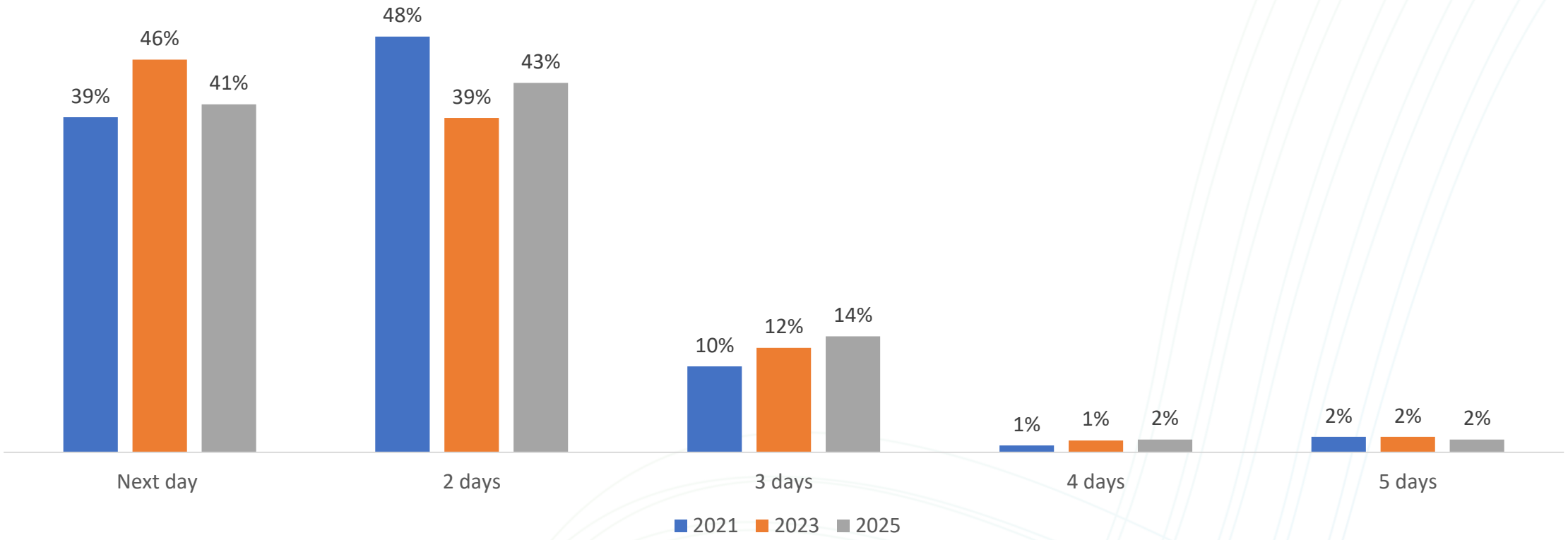
This question was included for the first time in the 2025 survey; therefore, no comparisons with previous years are available



Universal Postal Service (3)

Perceived acceptable lead time from the date of posting an addressed letter to delivery

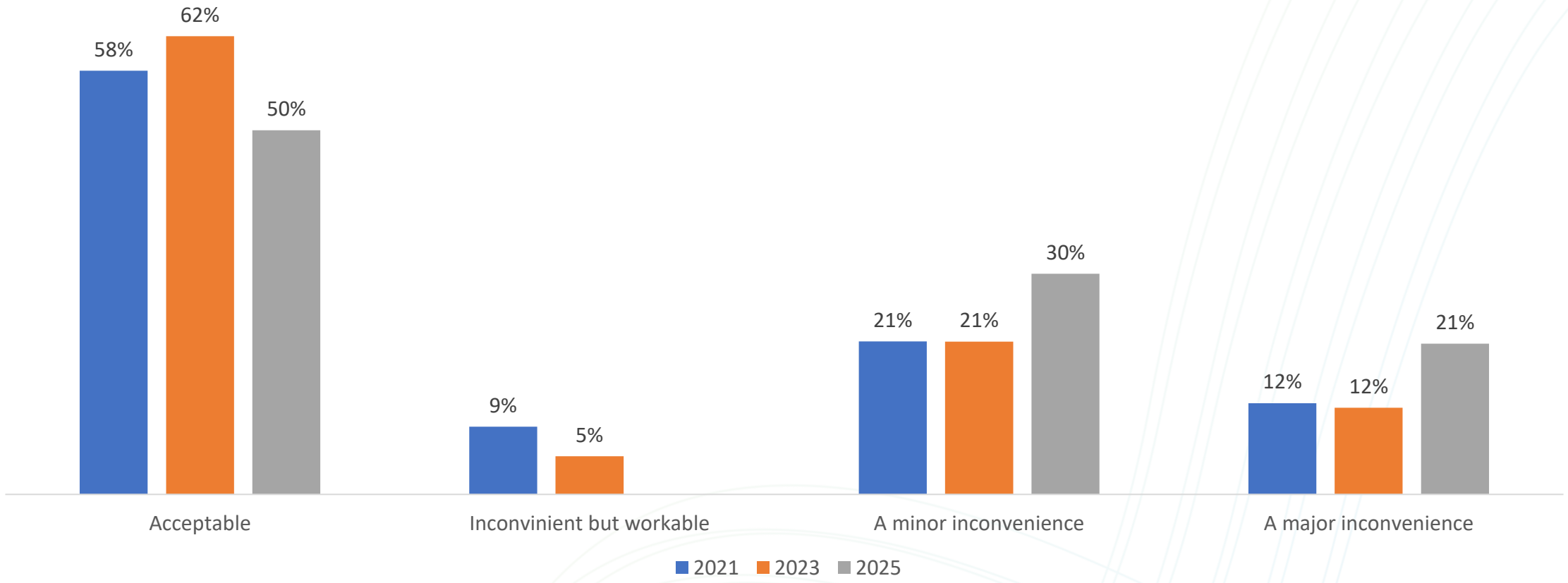
Number of households respondents to the survey - 400



Universal Postal Service (4)

Perceived household impact of reducing addressed mail delivery from 6 to 5 days per week

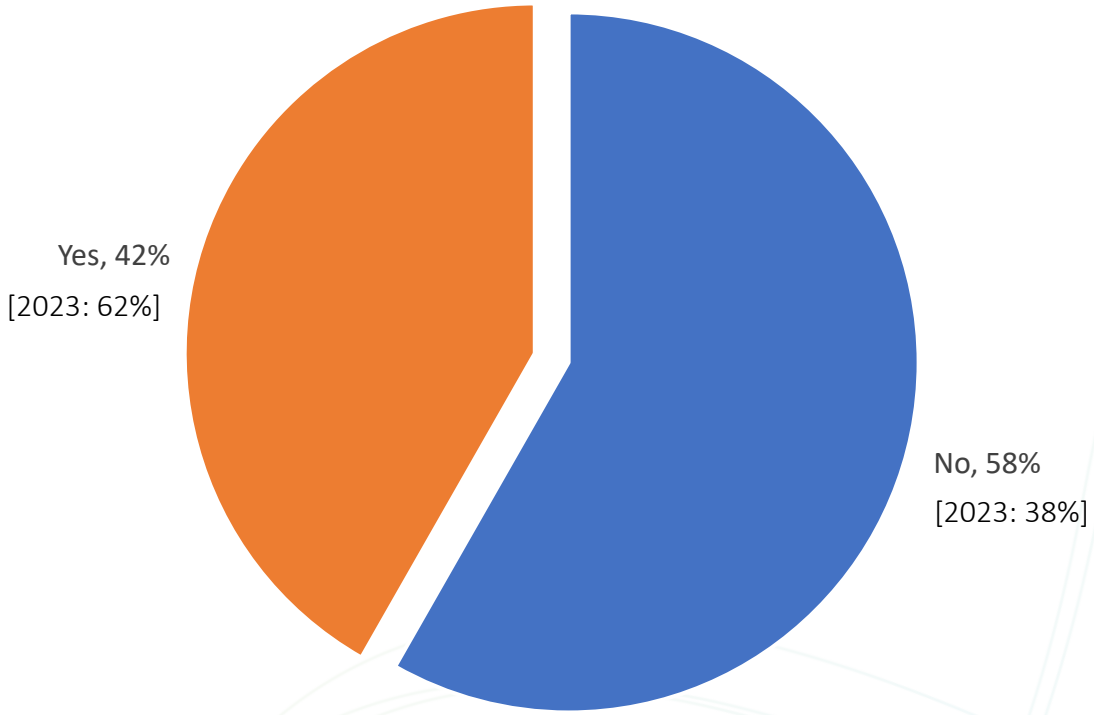
Number of household respondents to the survey - 400



Universal Postal Service (5)

Respondents' perception of the reasonableness of a price increase to maintain the current 6-day delivery frequency for addressed letter mail

Number of household respondents to the survey - 400



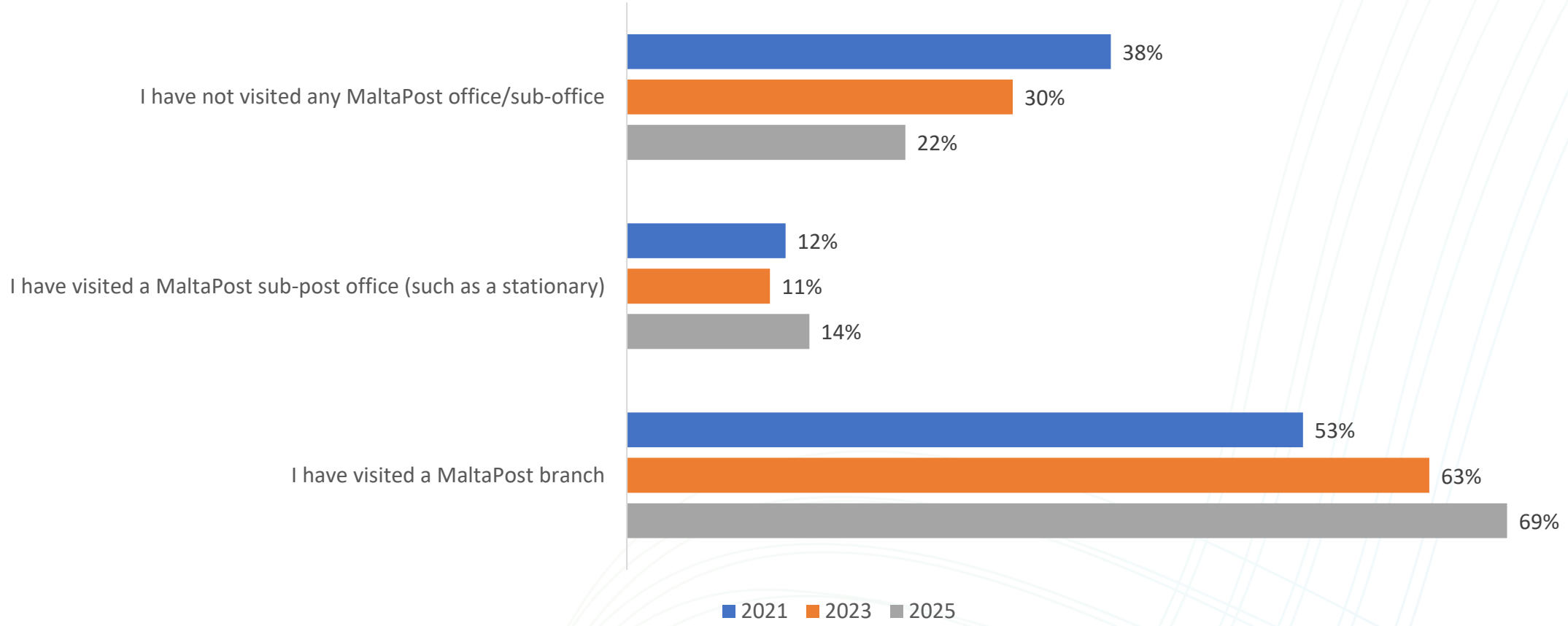
Visits to MaltaPost Offices

Visits to MaltaPost Offices (1)

Share of respondents visiting MaltaPost offices – by type of outlet

Total number of survey respondents – 400

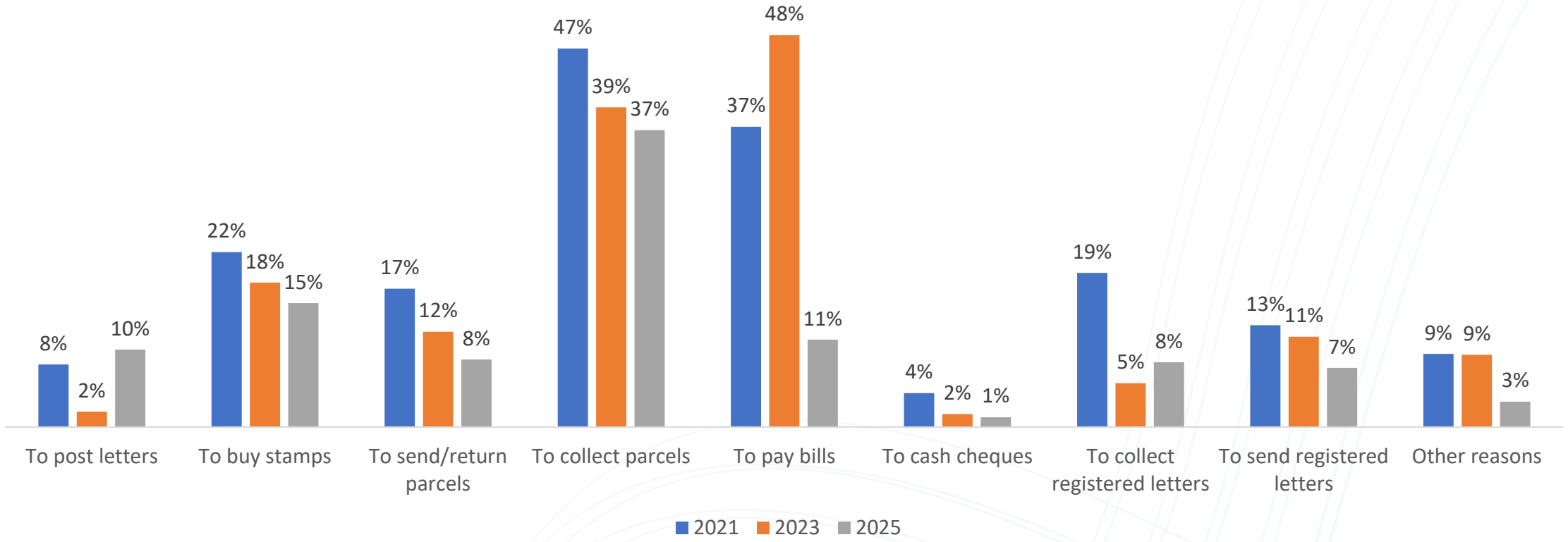
Respondents were allowed to provide multiple responses, stating that they visited both a MaltaPost office as well as a sub-office



Visits to MaltaPost Offices (2)

Reasons for visiting a MaltaPost outlet

Number of survey respondents visiting a MaltaPost outlet – 332

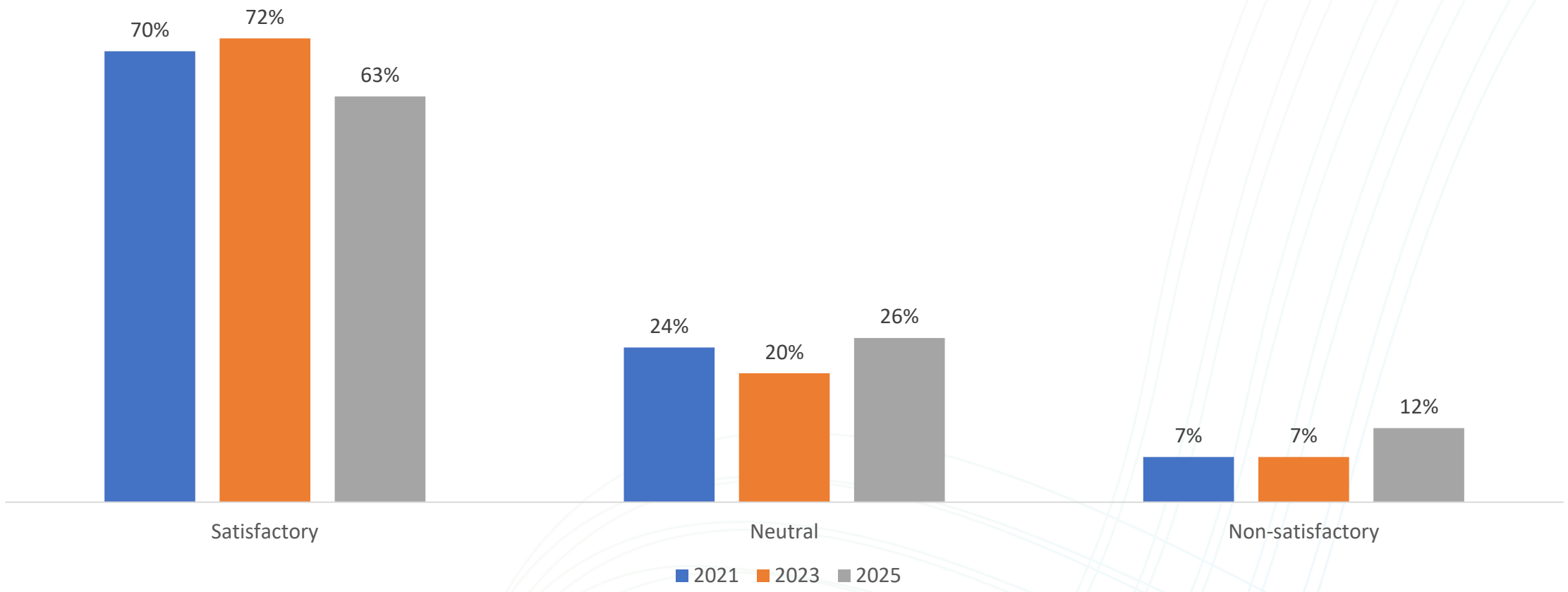


MaltaPost customer care and service quality

MaltaPost's service quality

Households' opinions on MaltaPost's overall service quality

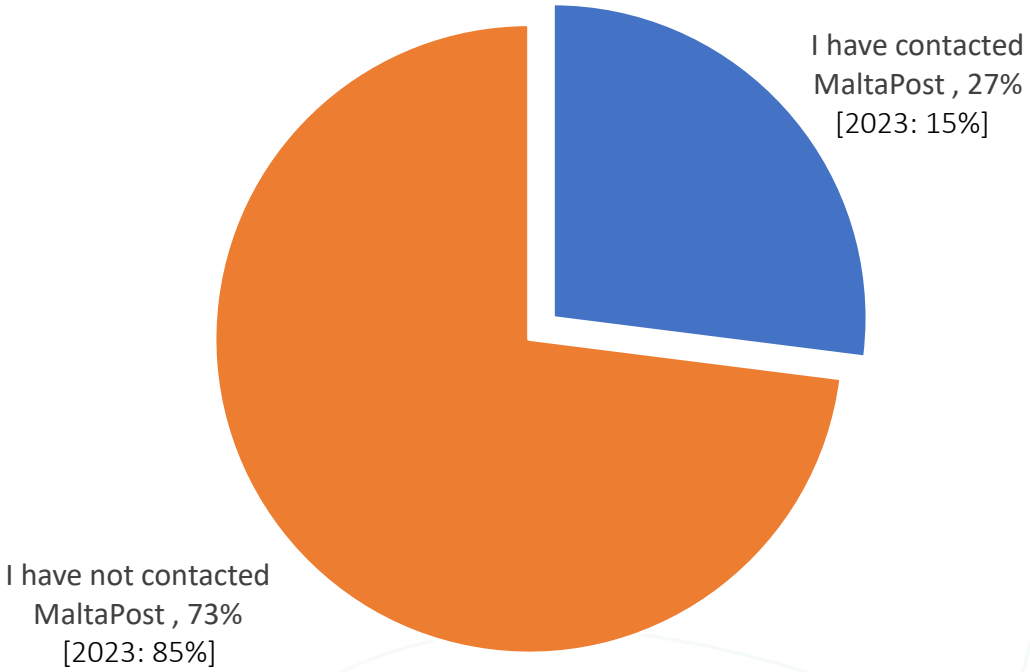
Number of household respondents to the survey – 400



MaltaPost customer care services (1)

Households contacting MaltaPost - previous 12 months

Number of household respondents to the survey – 400

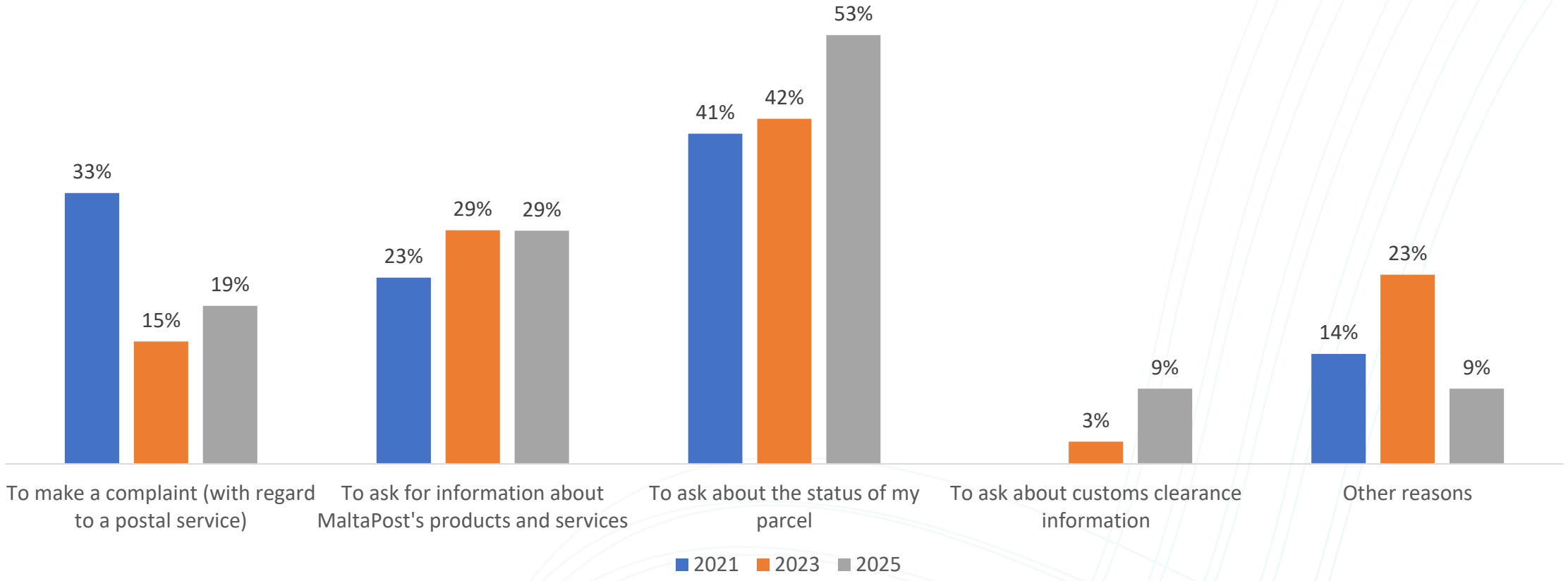


MaltaPost customer care services (2)

Reasons for contacting MaltaPost - previous 12 months

Number of survey respondents that contacted MaltaPost – 108

Respondents are allowed to select multiple reasons

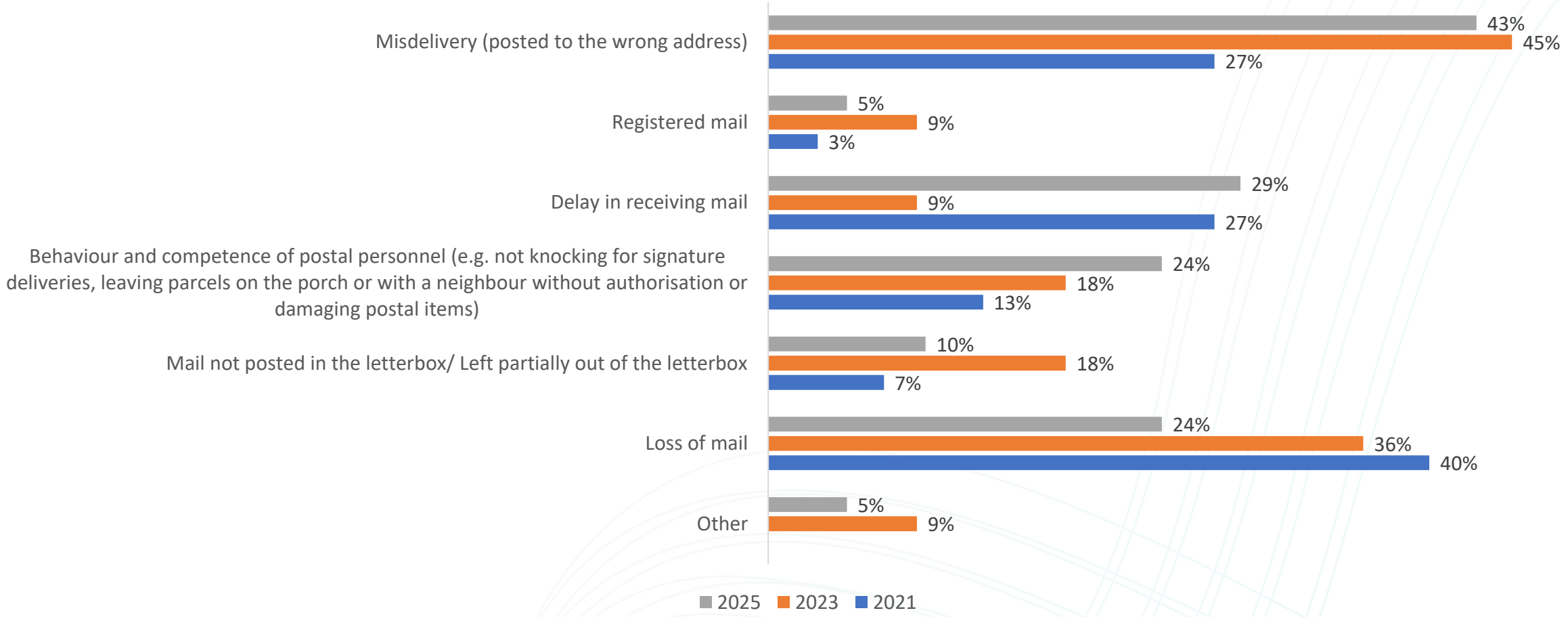


MaltaPost customer care services (3)

Reasons for filing a complaint with MaltaPost

Number of survey respondents that made a complaint to MaltaPost – 21

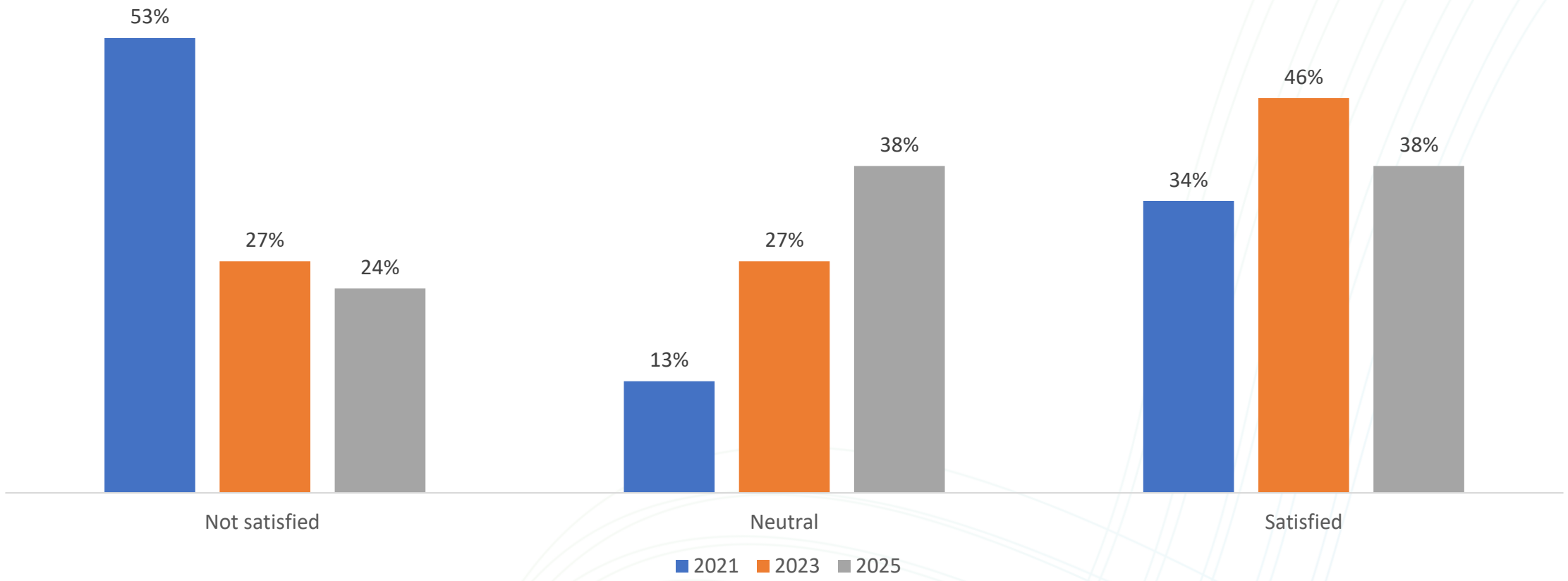
Respondents are allowed to select multiple reasons



MaltaPost customer care services (4)

Customer satisfaction with complaint resolution

Number of survey respondents that made a complaint to MaltaPost – 21



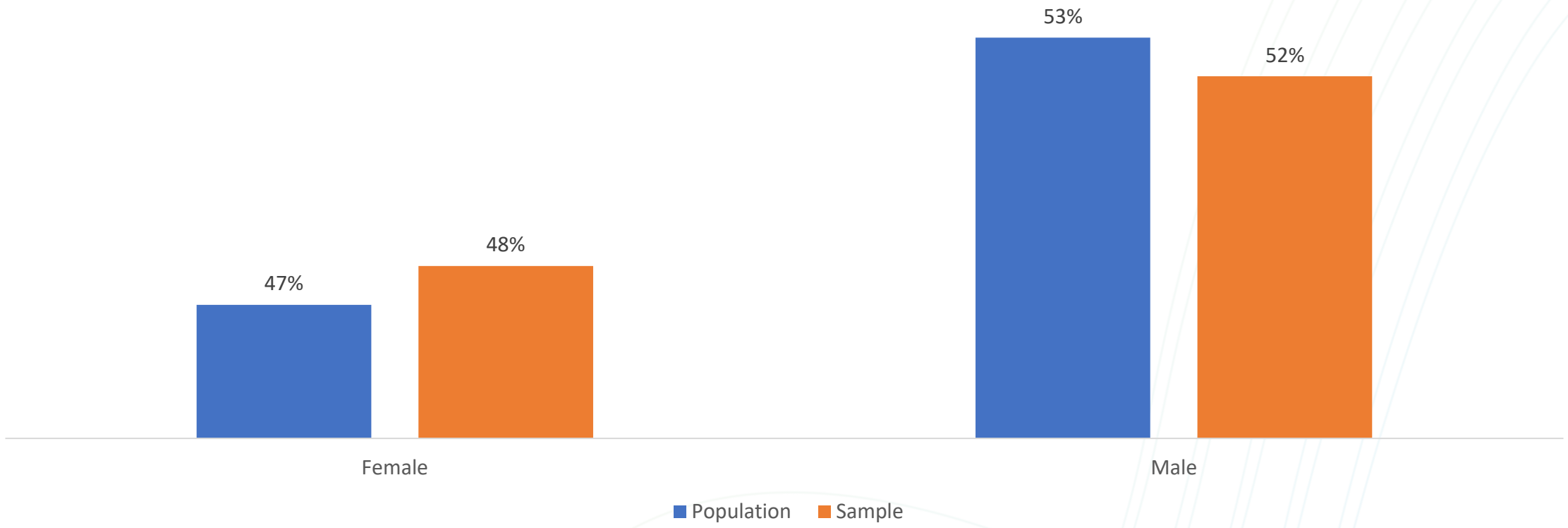
mca 25 YEARS

Annex
Survey Methodology

Methodology (1)

Stratification of target responses by: Gender distribution

Population data is based on national statistics, (NSO 2025)[1]

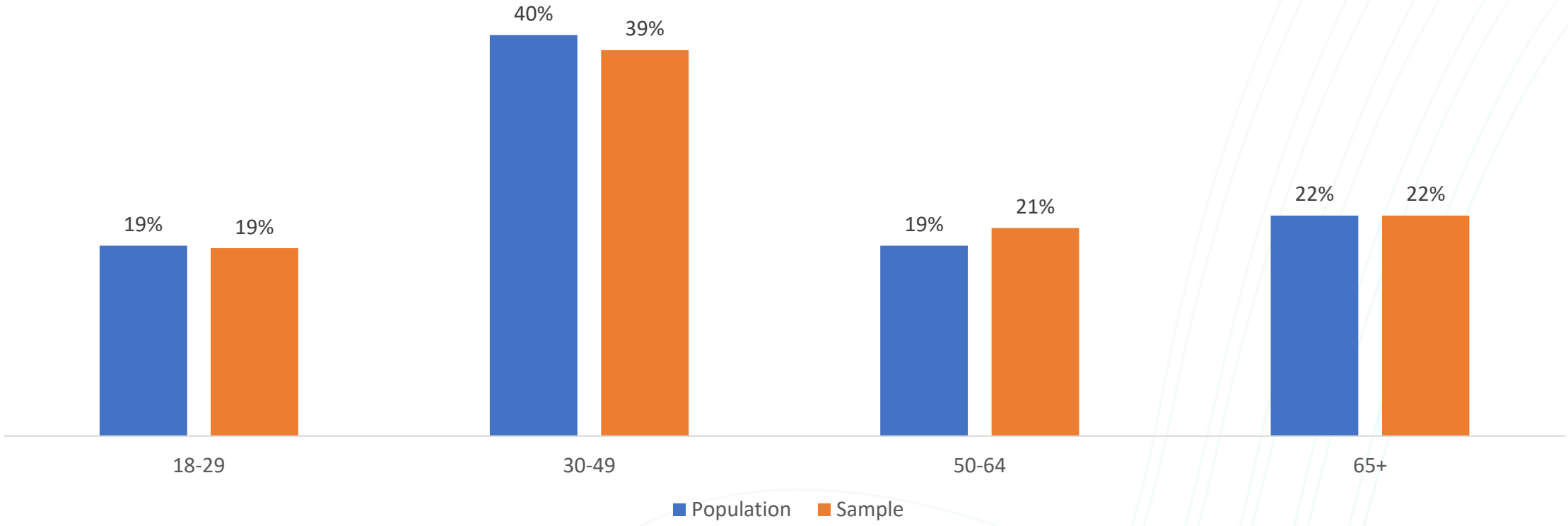


[1]National Statistics Office Malta, 2025. World Population Day: 11 July 2025. Available at: https://nso.gov.mt/population/world-population-day-11-july-2025/ [Accessed November 3rd 2025]

Methodology (2)

Stratification of target responses by: Age distribution

Population data is based on national statistics, (NSO 2023)[2]

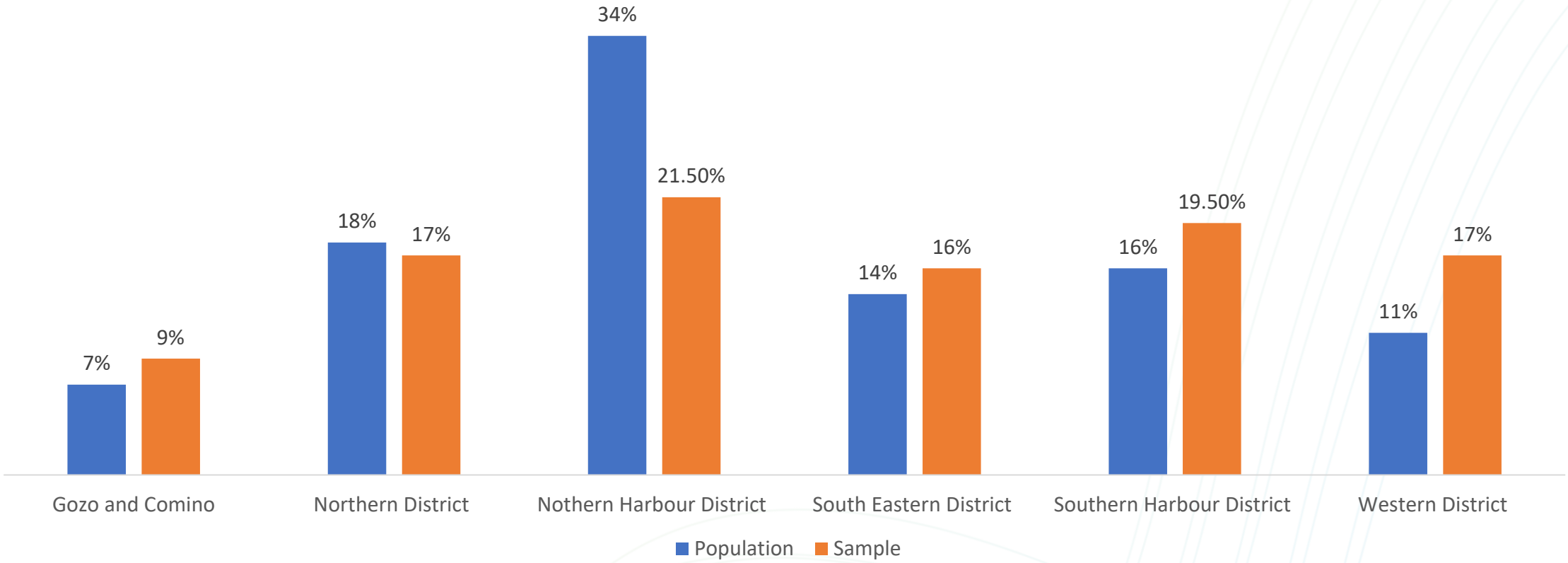


[2]*National Statistics Office Malta, 2023. Census of Population and Housing 2021: Final Report: Population, migration and other social characteristics (Volume 1). 16 February. Available at: https://nso.gov.mt/themes_publications/census-of-population-and-housing-2021-final-report-population-migration-and-other-social-characteristics-volume-1/ [Accessed November 3rd 2025].*

Methodology (3)

Stratification of target responses by: Location of residence distribution

Population data is based on national statistics, (NSO 2023)[3]



[3]*National Statistics Office Malta, 2023. Regional Statistics MALTA 2023 Edition. 17 July. Available at: https://nso.gov.mt/themes_publications/regional-statistics-malta-2023-edition/ [Accessed November 3rd 2025].*