

Study of the delivery speed and delivery service quality of parcel mail items

Key findings

Conducted on behalf of the Bundesnetzagentur für Elektrizität, Gas,
Telekommunikation, Post und Eisenbahnen

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1 Introduction

One of the Bundesnetzagentur's numerous mandates is to ensure nationwide universal postal service at affordable prices. At the same time the agency monitors compliance with the quality standards for universal service provision. In contrast to the letter mail segment, a comprehensive analysis of the delivery speed for parcel mail items has not been conducted to date. Moreover, the Bundesnetzagentur presently has little statistically valid information at its disposal regarding quality in the parcel delivery service segment. Neither the annual evaluations of the dispute resolution requests and proceedings handled by the Bundesnetzagentur¹ nor previous consumer and business surveys, which the Bundesnetzagentur conducted in 2017 as part of its evaluation of postal universal service,² provide a representative picture of the quality of parcel delivery service. For this reason, the Bundesnetzagentur commissioned Spectos to conduct a study that includes a comprehensive measurement of parcel speed of delivery and recipient surveys³ of quality criteria in the parcel delivery service segment.

The results of the parcel delivery speed measurements and the surveys of parcel recipients regarding delivery service quality will provide information that the Bundesnetzagentur can use to monitor the quality requirements laid down in the Ordinance concerning Universal Services for the Postal Sector (Postal Universal Service Ordinance – PUDLV).⁴ The findings from the delivery speed measurements and the recipient surveys of delivery service quality can additionally provide the basis for potential recommendations to the Federal Ministry for Economic Affairs and Climate Action and the German legislature for the further development of universal postal service and the regulatory framework for postal services.

Spectos and WIK-Consult began preparations for the parcel delivery speed measurements and the recipient surveys in April 2021 and concluded the project in October 2022 when they issued the report and presented their findings. Spectos conducted the surveys during the period from July 2021 until July 2022.

¹ Cf. https://www.bundesnetzagentur.de/DE/Vportal/Schlichtung/Schlichtung_Post/start.html (German Version)

² Cf. https://www.bundesnetzagentur.de/SharedDocs/Downloads/DE/Sachgebiete/Post/Verbraucher/Universaldienst/Universaldienst_ergebnis.html (German Version)

³ The generic masculine used in this report refers concurrently to male, female and other gender identities. For reasons of better readability, this report does not use gender-specific forms of speech. All gender identities are however meant when required by the content of any statements using the generic masculine.

⁴ <http://www.gesetze-im-internet.de/pudlv/> (German Version)

2 Methodology

2.1 Measurement of parcel speed of delivery

Parcel delivery speeds were measured on the basis of available tracking data. The data came from the Spectos study participants panel ('mail agents') and from Spectos' meta-tracking app partner parcello.

Delivery speeds were measured on the basis of tracking data from parcels handled by the five largest parcel delivery service providers (DHL, DPD, GLS, Hermes and UPS) operating in the German parcel delivery service market. The measurements took into account only national parcel shipments that were mailed within Germany's borders by commercial senders and delivered to consumers (Business-to-Consumer or B2C parcels) in Germany. The parcels were standard items. In other words, the speed of delivery measurements did not include parcels with a guaranteed delivery time (express parcels) or a designated delivery date.

Although it was initially planned to include parcels that were delivered by Amazon Logistics through its network of subcontractors, this was not possible because the tracking data for these parcels was not available to third parties. Likewise, the delivery times for Warenpost items and DHL Päckchen (small packages) could not be taken into account because these types of mail items cannot be tracked in the same way as parcel items or cannot be tracked at all.

The use of tracking data means that the delivery speed measurements are geared more to the internal perspective of the respective parcel delivery service provider and not to the sender's perspective. Parcel speed of delivery is defined as the period of time between the first retrievable scan (at a depot or sorting centre) and the last scan (successful delivery or first attempted delivery at the recipient address). Calculations are made based on the relevant timestamps. Measuring on the basis of retrievable tracking data means that respective delivery speeds tend to be somewhat higher than they would be from the sender's perspective. Further, when interpreting the results, it should be noted that parcel delivery service providers have different process flows. As a result, the point in the process and the location of the first scan that is available to third parties can differ depending on the delivery service provider. As a rule, the first retrievable scan occurs in the respective service provider's depot. The parcel delivery service provider Hermes is a special case because it usually conducts its first scan when a parcel arrives for processing and loading for onward shipment at a sorting centre.⁵

The results presented here refer to delivery service that is provided six days a week (Monday through Saturday) in keeping with the Postal Universal Service Ordinance requirement for parcel delivery, even though two of the companies examined here (GLS and UPS) normally deliver parcels on five rather than six days a week.

⁵ The reason for this is the fact that large-volume senders consign their parcels at Hermes sorting centres.

To measure parcel delivery speeds, tracking data for a total of 120,126 parcels were gathered over a 12-month period beginning on 1 July 2021 and ending on 30 June 2022 and then analysed.⁶ The data were collected in regular intervals over the course of all 12 months (with more than 10,000 observations per month) and across all ten German routing zones⁷ (with more than 12,000 observations per routing zone during the measuring period). The size of the respective company's sample is based on its share of B2C items in the German parcel delivery market as represented by the five parcel delivery service providers surveyed here. An analysis of the tracking data gathered by parcello, Spectos' meta-tracking app partner, was used to estimate the volume-based shares for the year 2020. It can be assumed that the estimated shares provide a good reflection of the B2C parcel delivery service segment's actual structure.

The results of the parcel delivery speed measurements are presented in section 3, calculated as percentage shares of parcels that are delivered on the following business day (D+1) or the second business day (D+2) after the day on which the parcel was posted. The shares shown here are weighted shares. The weighting was based on the estimated real shipping volumes for each parcel delivery service provider and routing zone. The weighted shares are representative for the entire market, the individual routing zones and parcel delivery service providers for the year, with the above-mentioned restrictions.⁸

2.2 Surveys of delivery service quality from the recipient's perspective

Spectos conducted two different consumer surveys in order to obtain data on delivery service quality from the recipient's perspective. Both surveys were conducted independently of one another.

- (1) The first survey was related to the measurement of parcel delivery speeds. Randomly selected parcel recipients were asked to answer questions directly following receipt of a (tracked) parcel. These questions pertained to parcel condition, delivery location, possible complaints relating to delivery, and the recipient's satisfaction with the delivery and the parcel's delivery speed. In contrast to the parcel delivery speed measurement, which was based entirely on the internal perspective of the participating parcel delivery service providers, the recipients did not always know

⁶ For the sake of simplification, the following report will speak of annual averages or annual results rather than 12-month averages or 12-month results. The 'annual averages' and 'annual results' cited here do not refer to a calendar year, but rather to the entire survey period which extended from July 2021 through June 2022.

⁷ Germany is divided into ten postal routing zones. The first digit of the postal code indicates the routing zone.

⁸ Assuming that the distribution of the estimated actual parcel item volume at annual level also applies to the individual months, the weighted shares are representative at monthly and quarterly level as well.

when the sender actually handed the parcel over to the parcel delivery service provider.⁹

The sampling was based on the share of total parcel volume in the German parcel market that the respective parcel delivery service provider accounted for. Consequently, the results are representative of the delivery service quality in the German B2C parcel market (excluding Amazon Logistics) as perceived by parcel recipients.

The survey targeted Spectos mail agents and users of the parcello parcel tracking app. It was conducted continuously over the course of the year, with a total of 2,580 surveys conducted per quarter. In total, these surveys were conducted in connection with 10,320 deliveries.

- (2) The second survey was conducted to examine additional aspects from the recipient's perspective regarding satisfaction in connection with customer statements relating to the delivery of parcel items and substitute delivery.

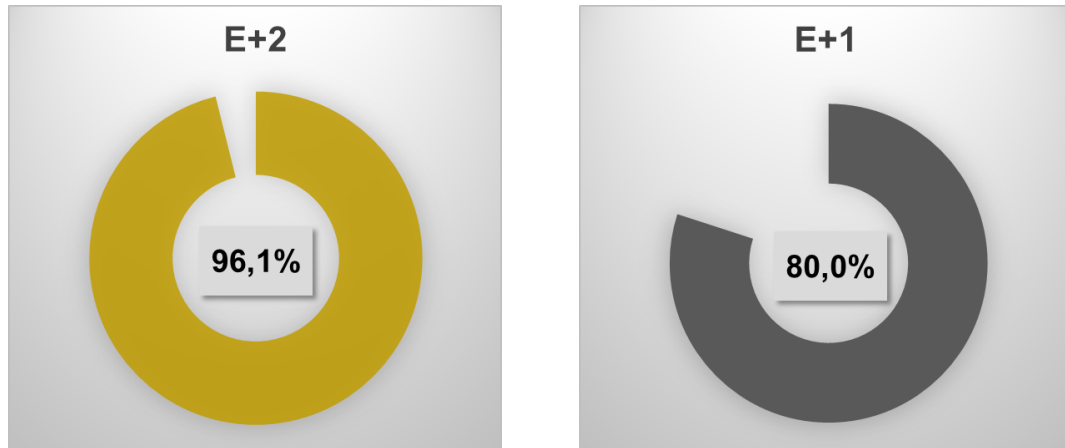
When sampling, attention was paid to ensuring that the geographic distribution of the respondents between the individual routing zones approximated the household distribution in Germany. No other demographic characteristics were taken into account. Consequently, the results are not representative in terms of the population of the Federal Republic of Germany. They do, however, provide initial indicators for other aspects of recipient behaviour, particularly the use of parcel redirection options.

A total of 1,038 heterogeneous Spectos mail agents were interviewed for the second survey. This survey focused on the respondents' experiences during the previous quarter and was conducted in four waves: in October 2021, January 2022, April 2022 and July 2022.

⁹ This would depend on whether the sender – an online merchant, for example, or their mail-handling service provider – informs the recipient of when the parcel was handed over to the delivery service provider.

3 Key findings from the parcel speed of delivery measurement

Figure 1: Delivery performance for the German market (annual averages)

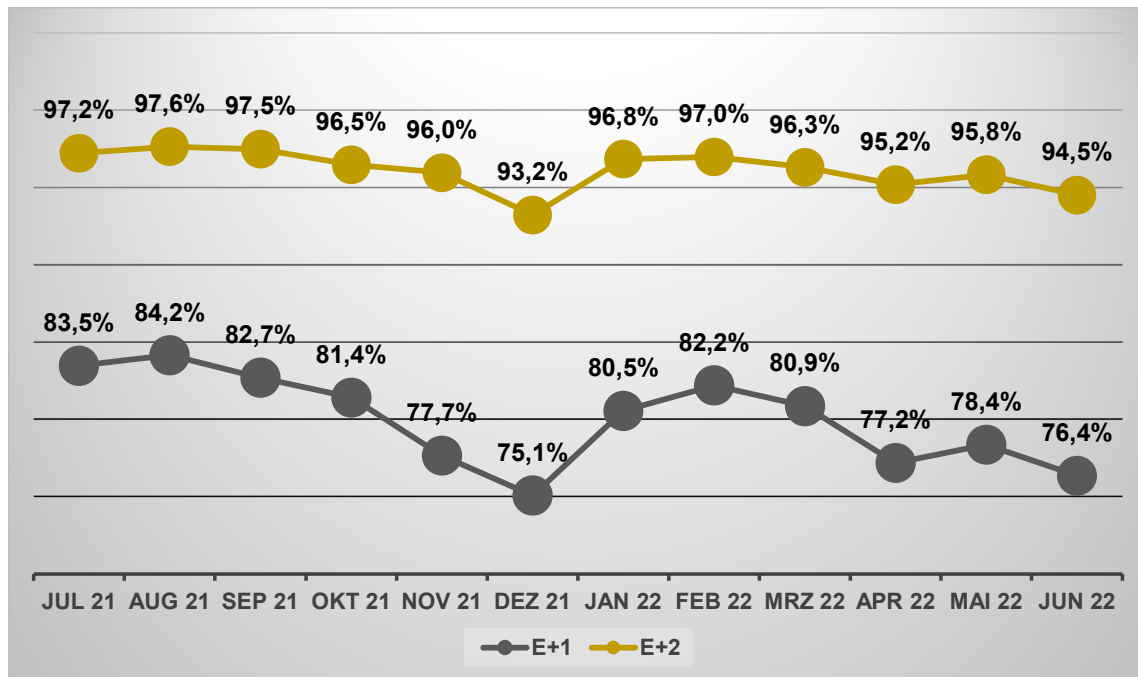


Source: Spectos / WIK

Note: Averages were calculated on the basis of tracking data from a total of 120,126 parcels.

- On annual average, 96.1% of parcels were delivered on the second business day after the day of posting (D+2). This means that parcel delivery service providers greatly exceeded the requirements stipulated in the Postal Universal Service Ordinance for maximum parcel delivery speeds, according to which at least 80% of the parcels must be delivered by the second business day after being posted (Figure 1, left-hand diagram).
- In fact, at national level 80.0% of parcels were delivered on the first business day after being posted (Figure 1, right-hand diagram), achieving the rate prescribed by law as the target for delivery by the second business day after the day of posting.

Figure 1: Delivery performance for the German market (monthly averages)

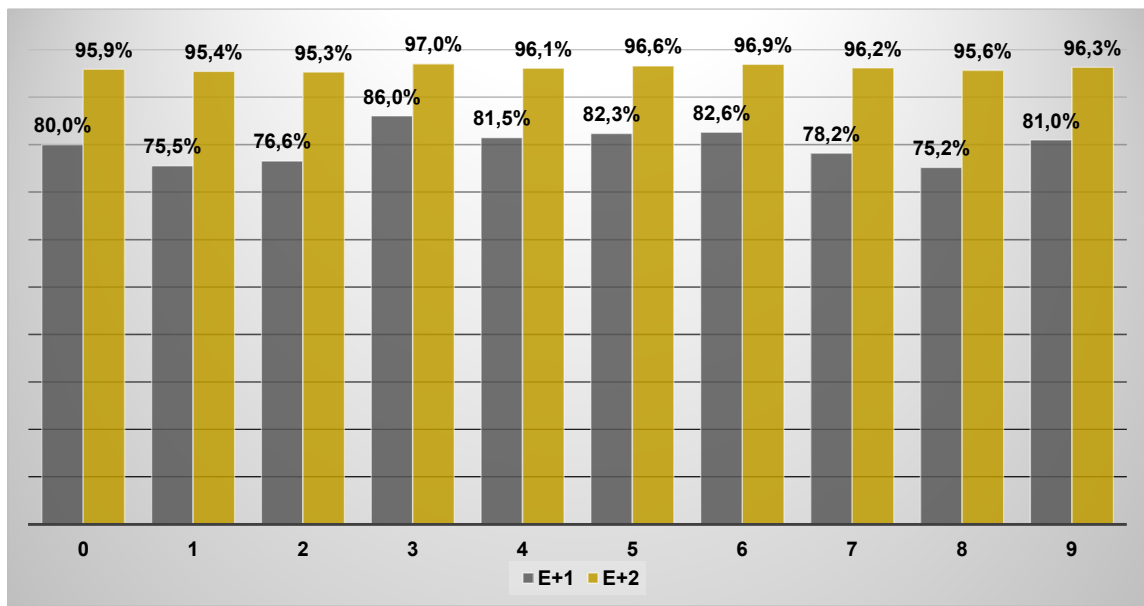


Source: Spectos / WIK

Note: Averages were calculated on the basis of 120,126 observations which were evenly distributed over the months, with more than 10,000 parcel items per month.

- Furthermore, the D+2 delivery speed target of 80% was also significantly exceeded in every single month during the reference period (Figure 2).
- The D+1 delivery speed performance was greater than 80% in seven of the 12 months covered by the study. Overall, the fluctuation in the D+1 delivery speed performance was greater than in the D+2 delivery speed performance.
- A monthly comparison shows that the D+1 and D+2 delivery speed performance was significantly lower during the months November and December 2021 and April through June 2022 than in the other months.

Figure 2: Delivery performance for the German market, by routing zone (annual averages)

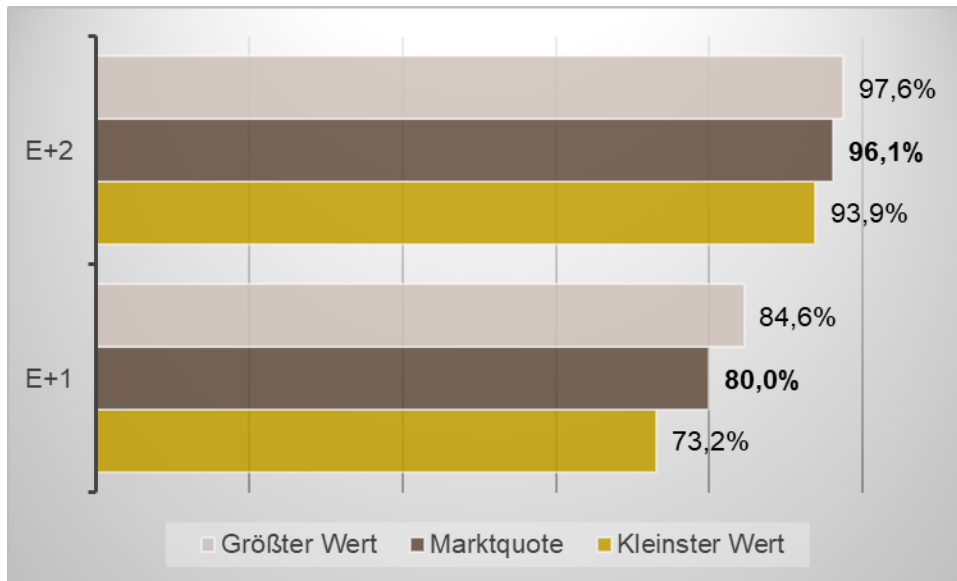


Source: Spectos / WIK

Note: Averages at the routing zone level were calculated on the basis of 120,126 parcel items that were evenly distributed over the routing zones, with more than 12,000 parcel items per month.

- In addition, the annual averages for each of the ten postal routing zones exceeded the required minimum performance of 80% laid down in the Postal Universal Service Ordinance for delivery on the second business day after posting (D+2). Values of 95.0% or more were achieved in all routing zones (Figure 3).
- In four routing zones, the share of parcels that were delivered on the following business day (D+1) was less than 80%. It was higher than this in the other routing zones. Postal routing zones 1 and 2 comprise the northern areas of Germany (Schleswig-Holstein, Mecklenburg-Western Pomerania and parts of Lower Saxony and Brandenburg) while postal routing zones 7 and 8 cover the southern areas (parts of Baden-Württemberg and Bavaria).

Figure 3: Range of delivery speed of the parcel delivery service providers and performance for the German market (annual averages)



Source: Spectos / WIK

Note: Averages were calculated on the basis of 120,126 parcel items.

Legend:

Größter Wert	Highest rate
Marktquote	Rate for the German market
Kleinster Wert	Lowest rate

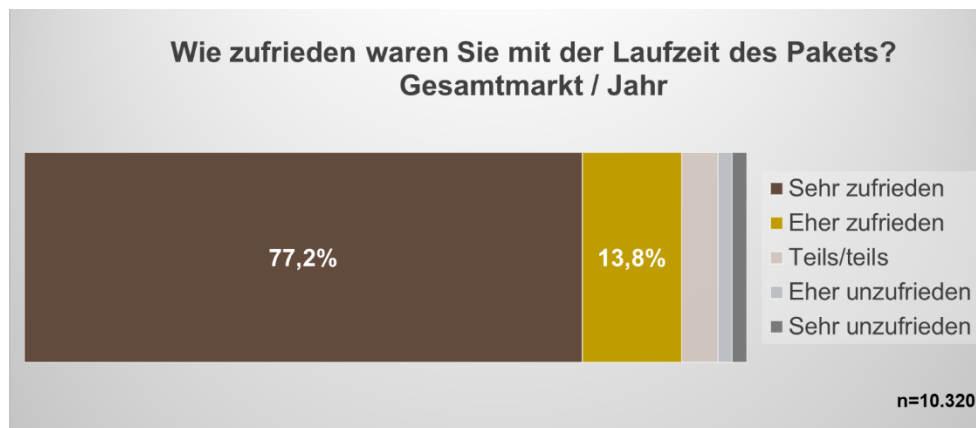
- The delivery speed performance of the individual parcel delivery service providers for delivery on the second day after posting (D+2) ranged between 93.9% and 97.6%. The delivery speed performance for the German market in this category is 96.1% (Figure 4). The D+1 parcel delivery speed performance achieved by the individual providers ranges from 73.2% to 84.6%; the performance for the German market is 80%. The markedly larger difference between the lowest and highest values for the D+1 results is due to the fact that two of the parcel delivery companies examined in this survey do not usually provide delivery service on Saturdays.
- Furthermore, each parcel delivery service provider included in this survey met the minimum D+2 speed of delivery performance of 80% laid down by the Postal Universal Service Ordinance for their national and annual averages not only nationwide every month but also as an annual average in every postal routing zone.

4 Key findings on delivery service quality from the recipient's perspective

The key findings from the recipient surveys for the entire market (Germany) are presented in the following section. The results of the surveys relating to actual deliveries (n=10,320) are summarised in section 4.1. The results of the surveys that pertain to the use of parcel redirection options (n=1,038) are given in section 4.2.

4.1 Findings of the first recipient survey of actual parcel deliveries

Figure 4: Satisfaction with the parcel delivery speed



Source: Spectos / WIK

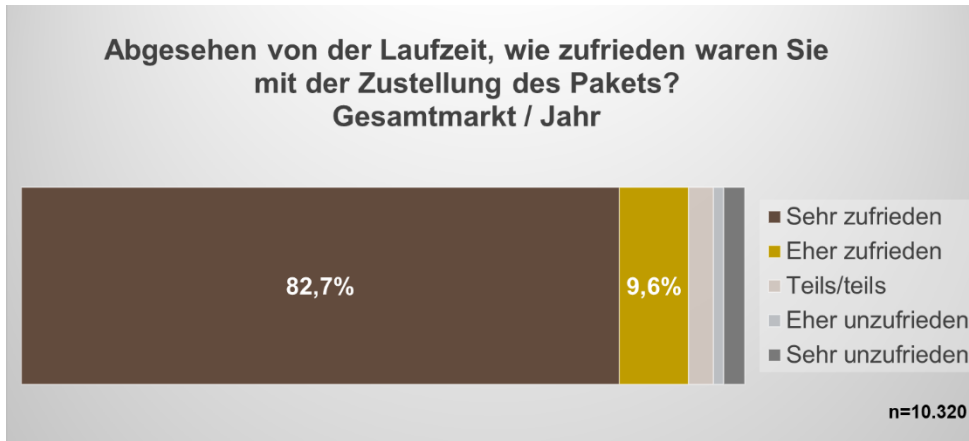
Legend:

Wie zufrieden waren Sie mit der Laufzeit des Pakets?	How satisfied were you with the parcel speed of delivery?
Gesamtmarkt / Jahr	Total market / Year
Sehr zufrieden	Very satisfied
Eher zufrieden	Generally satisfied
Teils/teils	Mixed
Eher unzufrieden	Generally dissatisfied
Sehr unzufrieden	Very dissatisfied

- The respondents were asked how satisfied they were on a scale of 0 to 10 with the parcel delivery speed (Figure 5).

- The majority of the respondents (90.9%)¹⁰ were generally satisfied with the parcel delivery speed (7 or 8 on the scale) or very satisfied (9 or 10).

Figure 5: Satisfaction with the delivery of the parcel (excluding delivery speed)



Source: Spectos / WIK

Legend:

Abgesehen von der Laufzeit, wie zufrieden waren Sie mit der Zustellung des Pakets?	Aside from the transit time, how satisfied were you with the delivery of your parcel?
Gesamtmarkt / Jahr	Total market / Year
Sehr zufrieden	Very satisfied
Eher zufrieden	Generally satisfied
Teils/teils	Mixed
Eher unzufrieden	Generally dissatisfied
Sehr unzufrieden	Very dissatisfied

- The respondents were asked to rate, on a scale of 0 to 10, how satisfied they were with the delivery of their parcel, aside from the perceived speed of delivery (Figure 6). The majority of respondents (92.2%) were generally satisfied or very satisfied with delivery speeds.

¹⁰ Differences due to rounding.

Figure 6: Place of delivery



Source: Spectos / WIK

Note: Deviations from 100% possible due to rounding.

Legend:

Wo wurde die Sendung zugestellt?	Where was the parcel delivered?
% der Befragten / Gesamtmarkt / Jahr	% of respondents / Total market / Year
Hausadresse durch Übergabe an den Empfänger des Pakets	Street address with parcel handed over to recipient
Hausadresse durch Übergabe an eine andere Person im Haushalt	Street address with parcel handed over to another person in the household
Ablageort an meiner Hausadresse	Drop-off location at my street address
Bei einem Nachbarn	At a neighbour's
Postfiliale, einem Paketshop oder einer Packstation	Postal outlet, Paketshop or Packstation
Andere Adresse (z.B. meinem Arbeitsort)	Other address (eg my workplace)

- Altogether, nearly three-quarters (74.6%) of all parcels (Figure 7) were delivered to the recipient’s street address (irrespective of whether they were handed over directly to the recipient or to another person in the same household). Another 16.4% of the parcels were left for the recipient at a designated drop-off location at the street address. The remaining parcels were delivered to a postal outlet, a Paketshop or a Packstation (4.3%), handed over to a neighbour (3.6%) or forwarded to another address (1.2%).
- Differences in performance for the individual types of delivery location can be observed between the parcel delivery service providers examined in this study. The performance of the individual parcel delivery service providers ranges from 70.2% to 75.6% for delivery to the street address; from 11.2% to 22.9% for using a designated drop-off location at the recipient’s street address; from 3.1% to 4.3% for delivery to a neighbour; and from 2.1% to 6.4% for delivery to a Paketshop or Packstation.

Figure 7: Share of parcels with damage to the parcel’s packaging or contents



Source: Spectos / WIK

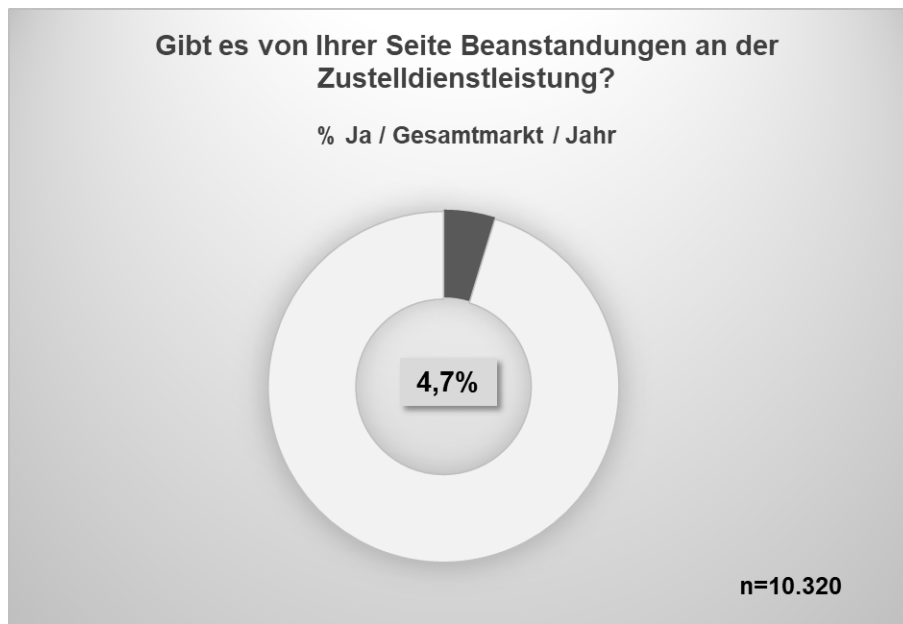
Legend:

Ist das Paket Ihrer Ansicht nach äußerlich beschädigt?	In your view, was the packaging of your parcel damaged?
% Ja / Gesamtmarkt / Jahr	% Yes / Total market / Year
Ist der Inhalt der Sendung Ihrer Ansicht nach beschädigt?	In your view, were the contents of your parcel damaged?
% Ja / Gesamtmarkt / Jahr	% Yes / Total market / Year

- According to the respondents, a total of 4.4% (456) of the 10,320 parcels delivered exhibited damage to the packaging (Figure 8, left-hand diagram).

- The participants were also asked about damage to the contents of their parcels. Out of 10,320 parcels, the contents of 1.3% (137) were damaged (Figure 8, right-hand diagram). It should be noted here that damage to a parcel's contents can also be the result of inadequate packaging.
- A total of 0.6% (62) of the 10,320 parcels exhibited damage to both the packaging and the contents.

Figure 8: Share of parcel items that were the subject of delivery-related complaints



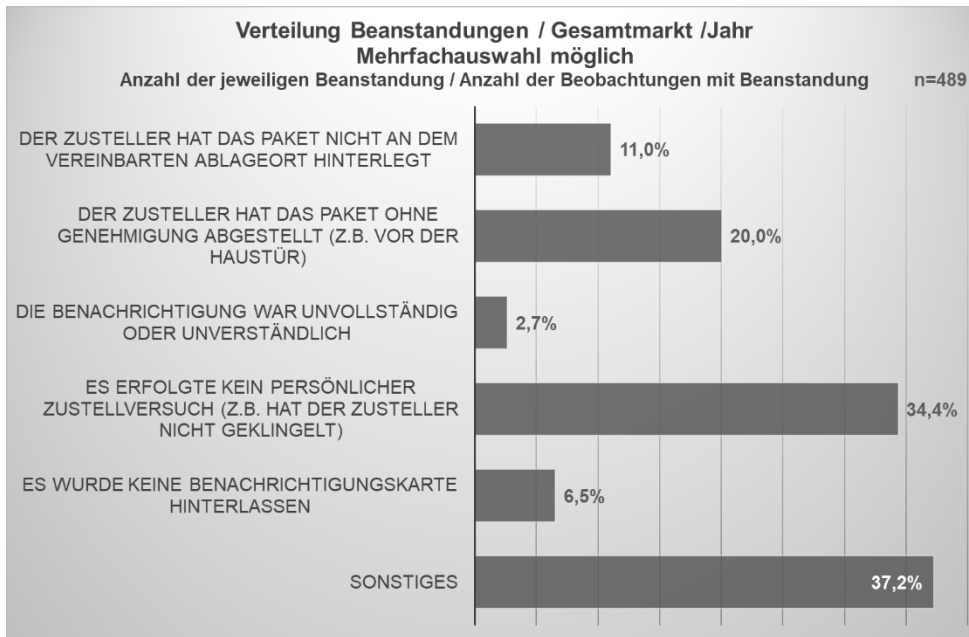
Source: Spectos / WIK

Legend:

Gibt es von Ihrer Seite Beanstandungen an der Zustelldienstleistung?	Did you have any complaints about the delivery service?
% Ja / Gesamtmarkt / Jahr	% Yes / Total market / Year

- In the case of 4.7% (489) of the 10,320 parcels, the respondents said that they had complaints related to the delivery service (Figure 9).

Figure 9: Breakdown of the complaints



Source: Spectos / WIK

Legend:

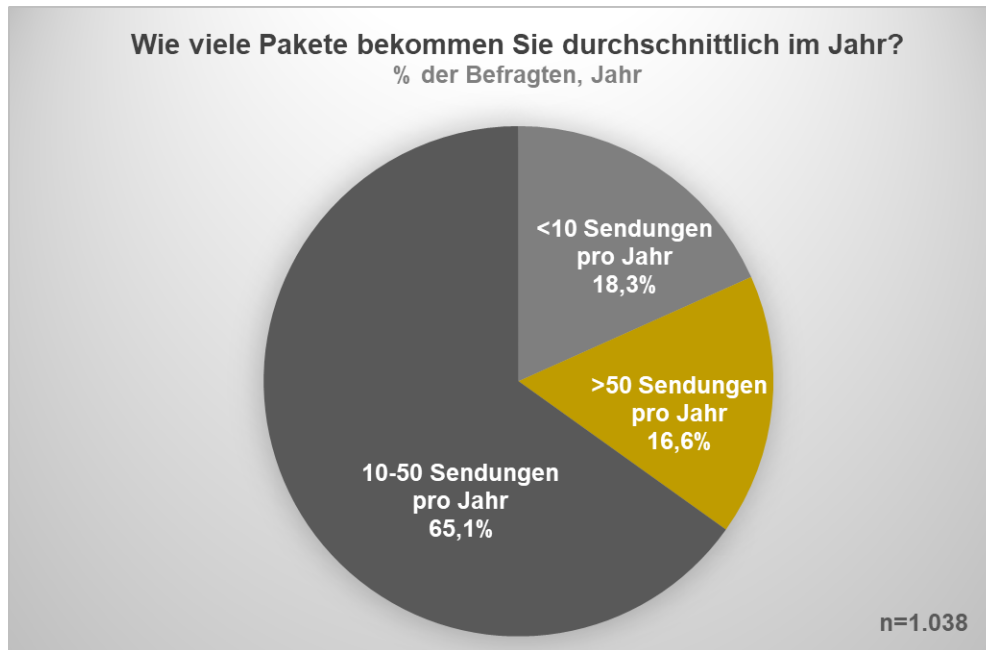
Verteilung Beanstandungen / Gesamtmarkt / Jahr	Breakdown of the complaints / Total market / Year
Mehrfachauswahl möglich	Multiple answers possible
Anzahl der jeweiligen Beanstandung / Anzahl der Beobachtungen mit Beanstandung	Number of the particular complaint / Number of observations with a complaint
Der Zusteller hat das Paket nicht an dem vereinbarten Ablageort hinterlegt	The deliverer did not deposit the parcel at the agreed drop-off
Der Zusteller hat das Paket ohne Genehmigung abgelegt (z.B. vor der Haustür)	The deliverer left the parcel without permission (EG on the doorstep)
Die Benachrichtigung war unvollständig oder unverständlich	The notification was incomplete or unintelligible
Es erfolgte kein persönlicher Zustellversuch (z.B. hat der Zusteller nicht geklingelt)	The deliverer did not try to deliver the parcel to me personally (EG the deliverer did not ring the doorbell)
Es wurde keine Benachrichtigungskarte hinterlassen	The deliverer did not leave a notification card
Sonstiges	Other

- A total of 34.4% of the 489 respondents who had reported making a complaint regarding the delivery service criticised that there had been no attempt to deliver the parcel to them personally (Figure 10). Some 20.0% of the parcel recipients surveyed said that the deliverer had simply left the parcel at the door without prior permission. Another 10.8% of the respondents complained that the parcel had not been left at the agreed drop-off location. In a few cases, the complaints involved the notification card, which had either not been left for the recipient (6.5%) or was incomplete or illegible (2.7%). Miscellaneous other reasons played a role in 37.2% of the cases.

4.2 The results of the second recipient survey of the redirection of parcels

- With a total of 1,038 surveys, the sample for the second survey covered considerably fewer observations than the first survey of actual parcel deliveries.

Figure 10: Structure of parcel recipients by number of delivered parcels



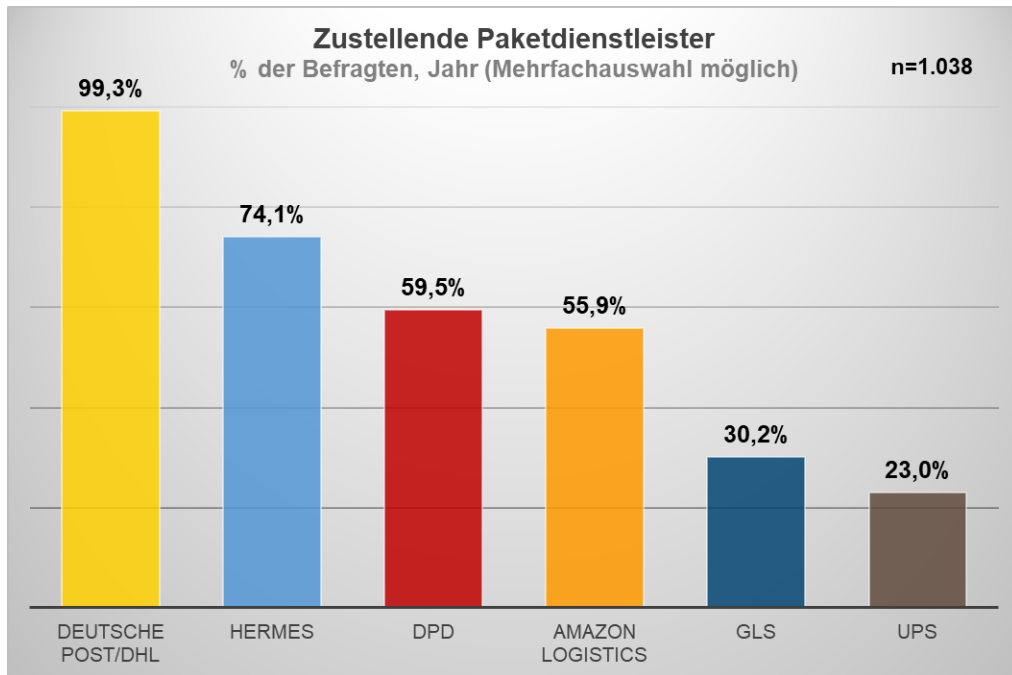
Source: Spectos / WIK

Legend:

Wie viele Pakete bekommen Sie durchschnittlich im Jahr?	On average, how many parcels do you receive in a year?
% der Befragten, Jahr	% of respondents, Year
<10 Sendungen pro Jahr 18,3 %	<10 items per year 18.3%
>50 Sendungen pro Jahr 16,6 %	>50 items per year 16.6%
10-50 Sendungen pro Jahr 65,1 %	10-50 items per year 65.1%

- When asked how many parcels they receive in a year on average, the majority of the respondents (65.1%) answered that they received between ten and 50 parcels. One in every six (16.6%) respondents said they received more than 50 parcels and 18.3% reported receiving fewer than ten parcels a year (Figure 11).
- In reply to the question where they usually had parcels sent to, 93.3% of the respondents said that parcels were normally sent to their street address. A total of 3.9% of the respondents used a Packstation, 1.6% used another street address and 1.2% had parcels delivered to a postal outlet or Paketshop.

Figure 11: Parcel delivery service provider making the delivery



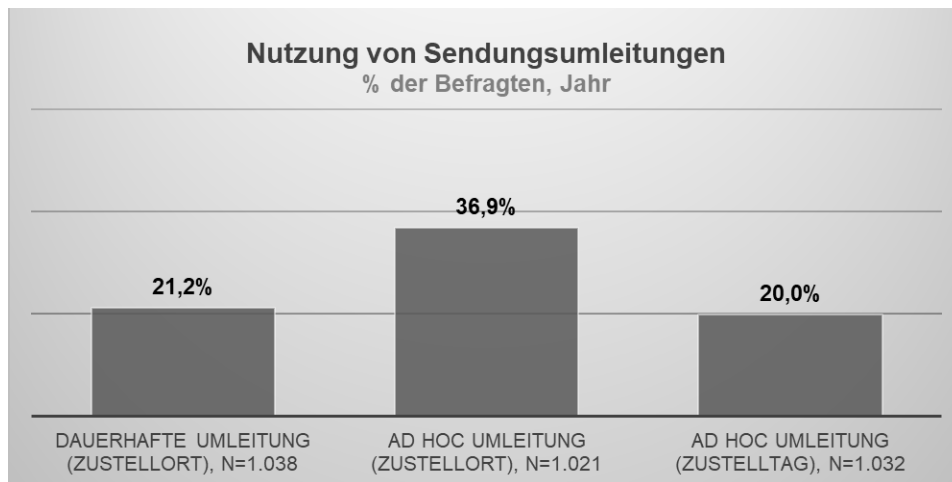
Source: Spectos / WIK

Legend:

Zustellende Paketdienstleister	Parcel delivery service provider making the delivery
% der Befragten, Jahr (Mehrfachauswahl möglich)	% of respondents, Year (multiple answers possible)
Deutsche Post/DHL	Deutsche Post/DHL
HERMES	HERMES
DPD	DPD
AMAZON LOGISTICS	AMAZON LOGISTICS
GLS	GLS
UPS	UPS

- Nearly all of the respondents (99.3%) reported having received parcels that were delivered by DHL (Figure 11). The parcel delivery service provider with the second-highest rate is Hermes (74.1%), followed by DPD (59.5%), Amazon Logistics (55.9%), GLS (30.2%) and UPS (23.0%).

Figure 12: Use of redirection or rescheduling options



Source: Spectos / WIK

Legend:

Nutzung von Sendungsumleitungen	Use of redirection options (place or date)
% der Befragten, Jahr	% of respondents; Year
Dauerhafte Umleitung (Zustellort), N=1.038	Permanent Redirection (Place of delivery), N=1,038
Ad Hoc Umleitung (Zustellort), N=1.021	Ad Hoc redirection (Place of delivery), N=1,021
Ad Hoc Umleitung (Zustelltag), N=1.032	Ad Hoc redirection (delivery day), N=1,032

- Approximately one out of every five respondents (21.2%) reported using permanent redirection options (Figure 13).¹¹ When those respondents who used a permanent redirection option for their parcels were asked about their preferred delivery location, more than three-fourths (78.6%) indicated that they had parcels delivered to a preferred drop-off location at their own street address. At 13.2%, the option 'delivery to a neighbour' ranked second. By contrast, only a few respondents preferred having their parcels redirected to a postal outlet or Paketshop (7.3%), a Packstation (6.8%) or another street address (2.7%).¹² In all, 85.8% of the 219 respondents who used a permanent redirection option were generally satisfied or very satisfied with it.

¹¹ This share appears to be very large. Again, please note that the survey does not permit any conclusions to be drawn regarding the actual use of redirection options by the general public. Rather, it provides only a preliminary indicator.

¹² Respondents could choose multiple answers to this question. As a result, the figures add up to more than 100%. Recipients could arrange for permanent redirection of their parcels with more than one parcel delivery service provider. In addition, it is possible to change the place of delivery for a permanent redirection order.

- More than one-third of the respondents (36.9%) said they had used the option to redirect their parcels to another place of delivery on an ad hoc basis (**Fehler! Verweisquelle konnte nicht gefunden werden.**, middle column). In all, 84.4% of the 302 respondents who had used ad hoc redirection to a different place of delivery were generally satisfied or very satisfied with the service.
- Only one in every five respondents (20.0%) used the redirection option on an ad hoc basis to have their parcel delivered on a different day (Figure 13, right-hand column). All in all, 81.2% of the 197 respondents who had used the redirection option on an ad hoc basis to have their parcel delivered on a different day were generally satisfied or very satisfied.

Figure 13: Experience with substitute delivery and estimated time of delivery notifications



Source: Spectos / WIK

Legend:

Erfahrungen mit Ersatzzustellung und Zeitfensterankündigungen	Experience with substitute delivery and estimated time of delivery notifications
% der Befragten, Jahr	% of respondents; Year
Hinterlegung in Postfiliale/Paketshop, N=1.038	Disposed at postal outlet or Paketshop for later pick-up, N=1,038

Zeitfensterankündigung, N=997	Estimated time of delivery notification, N=997
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- Approximately half of the respondents (51.0%) reported having parcels deposited for pick-up at a postal outlet or Paketshop following a failed delivery attempt (Figure 14, left-hand column). Of the 522 respondents who had to pick up their parcel at a postal outlet or Paketshop, 71.6% were generally satisfied or very satisfied. In all, the respondents rated their level of satisfaction with the substitute delivery with an average of 7.35 out of a maximum of ten possible points.
- A total of 148 respondents were neither satisfied nor very satisfied with the substitute delivery. This group was asked for the reasons for their rating. The most frequently cited reason was the opening hours of the postal outlet where they had to pick up the parcel (47.3%), followed by the distance to the respective postal outlet (45.3%) and the waiting time at the postal outlet (33.8%). There were significantly fewer complaints that the parcel was not (yet) at the postal outlet (18.2%).
- A large share of the respondents (90.6%) had already had experience with notifications of the estimated time of delivery (Figure 14, right-hand column). A total of 78.9% of the 863 respondents were generally satisfied or very satisfied with estimated time of delivery notifications, assigning an average of 7.75 points for their level of satisfaction.