



MCA Market Research

Postal Services - Business Bulk Mail Results

26th June 2019

EMCS Ltd carried out the survey between November 2018 and January 2019 on behalf of the MCA

Fieldwork

- 40 face-to-face interviews lasting around 30 minutes
- Survey respondents were chosen randomly from a number of business directories
- Respondents were all somehow responsible for the mail handling of the company

Sample

- Sample encompasses businesses making use of MaltaPost's bulk mail service to send addressed letter mail
- Bulk mailers reporting a minimum of 750 addressed letters in a year using the service formed part of the sample

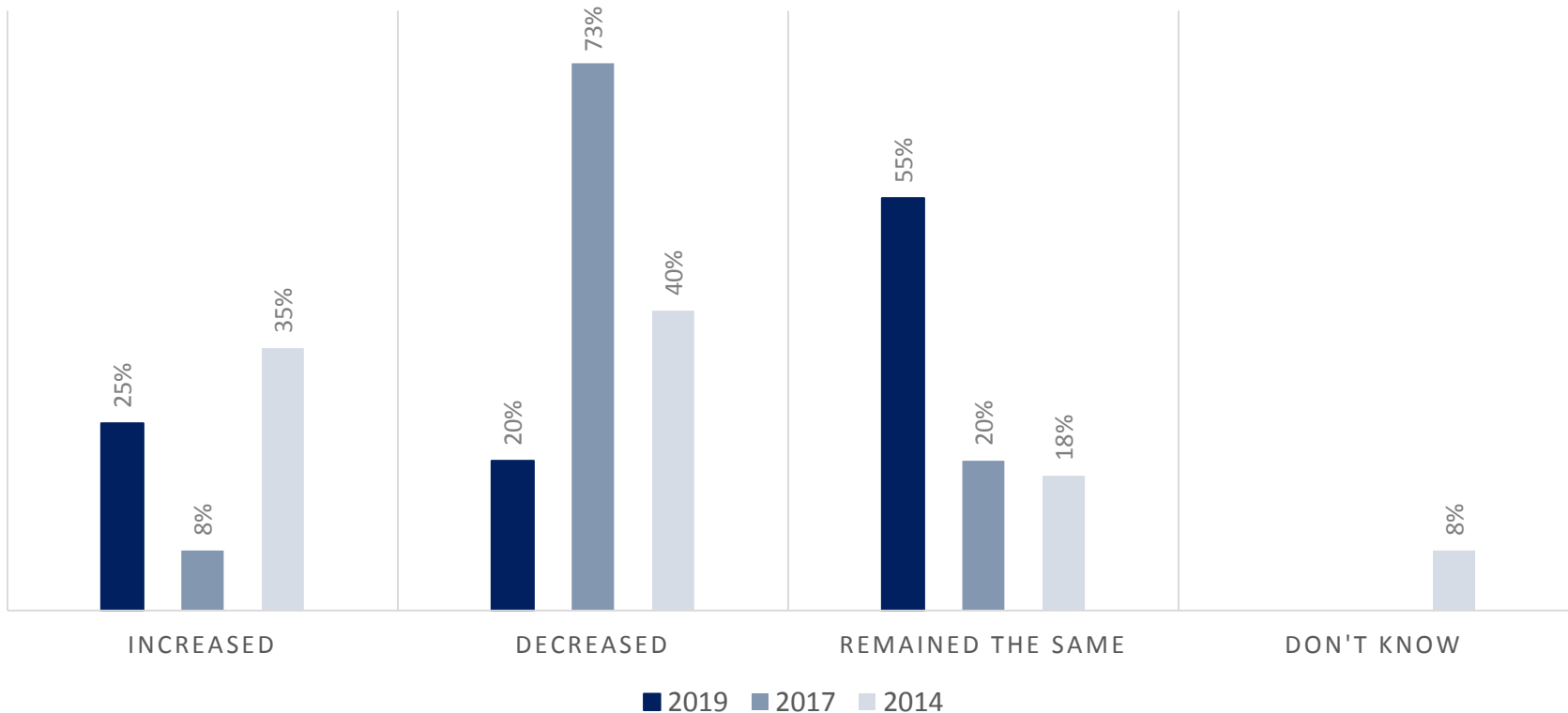
Responses

- A total of 40 organisations using MaltaPost's bulk mail service interviewed.

Changes in the Number of Bulk Mail Letters Sent

Number of Respondents: 40 (2019) / 40 (2017) / 40 (2014)

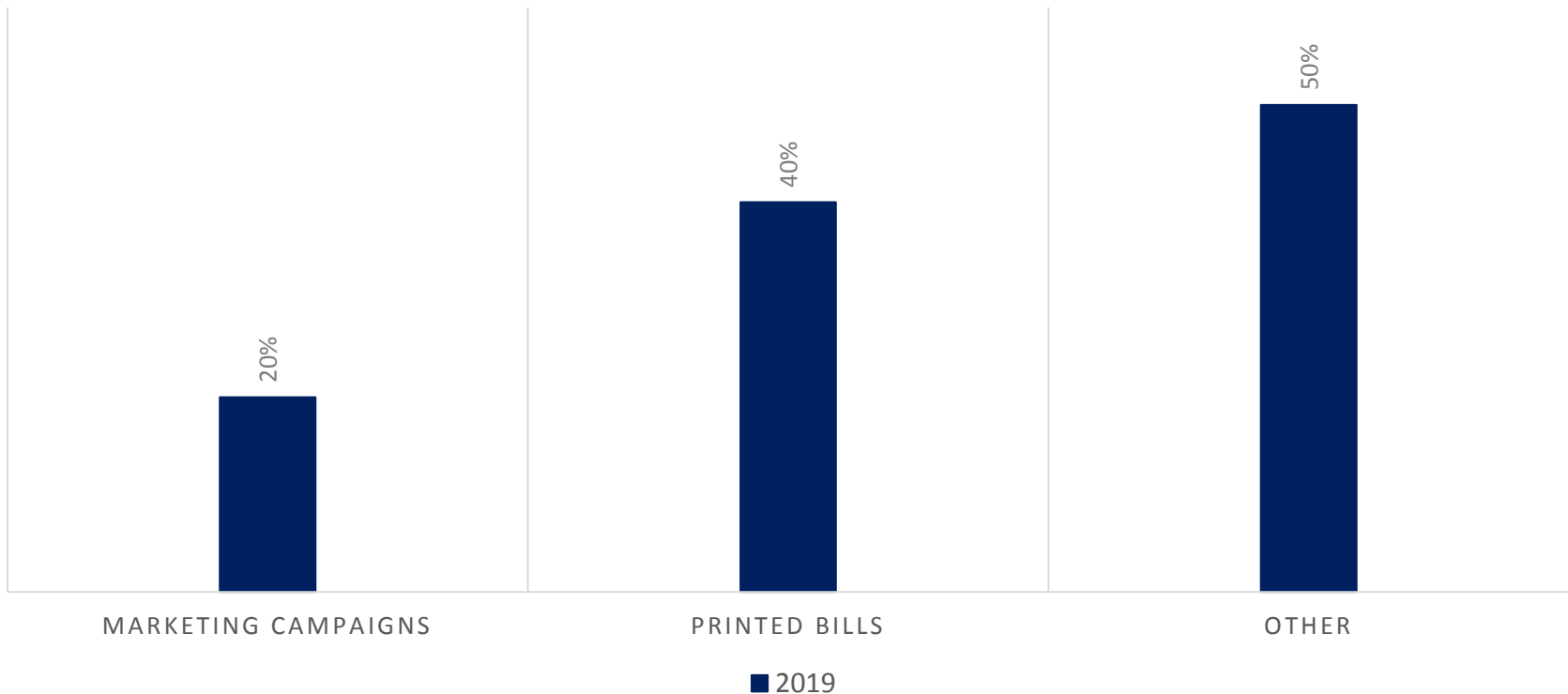
The majority of respondents (55%) claimed that the number of addressed letters sent by the organisation in the last 12 months remained the same.



Reasons for Increasing Use of Bulk Mail

Number of Respondents: 10

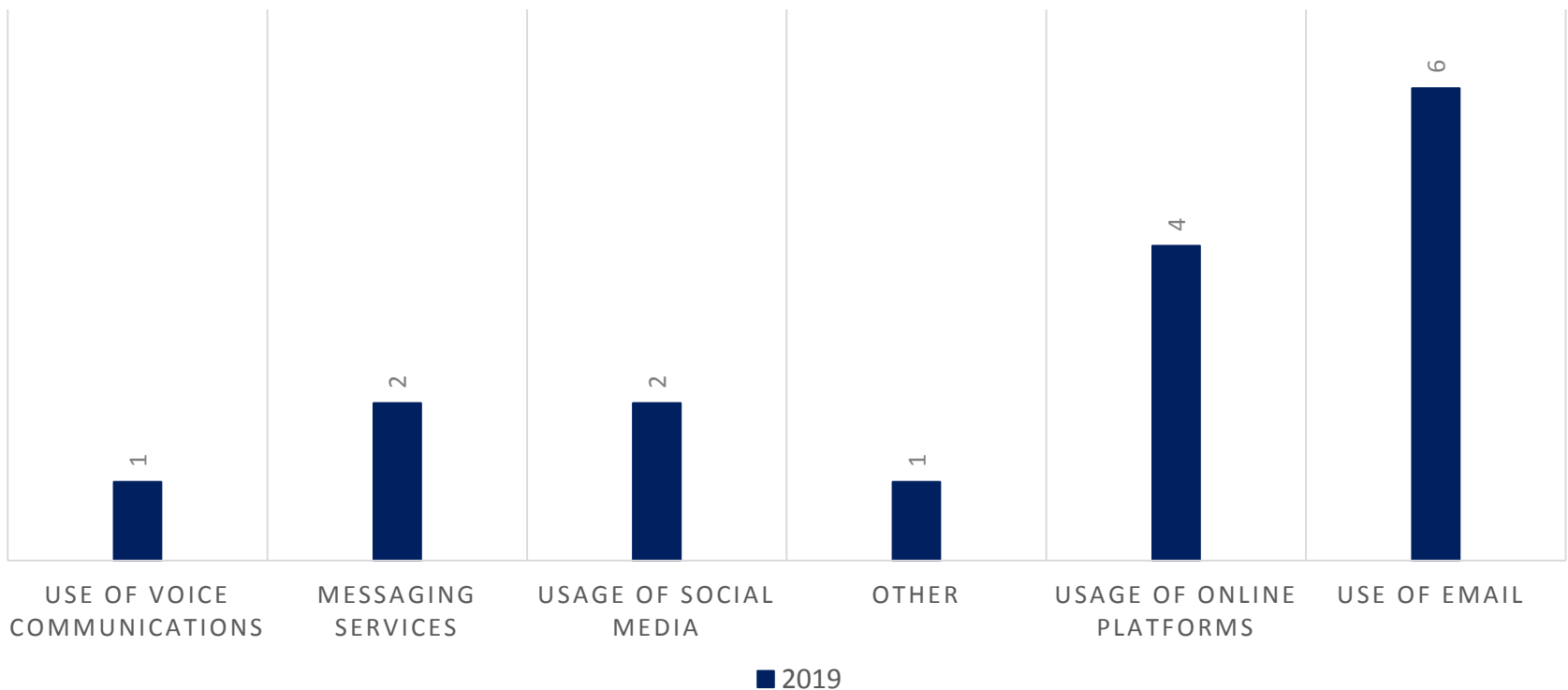
All businesses answering in the 'other' category cite business growth reasons, such as more clients, new establishments, and large inflows of correspondence, as the main reasons for increase.



Reasons for Decreasing Use of Bulk Mail

Number of Respondents: 8. Multiple responses were allowed.

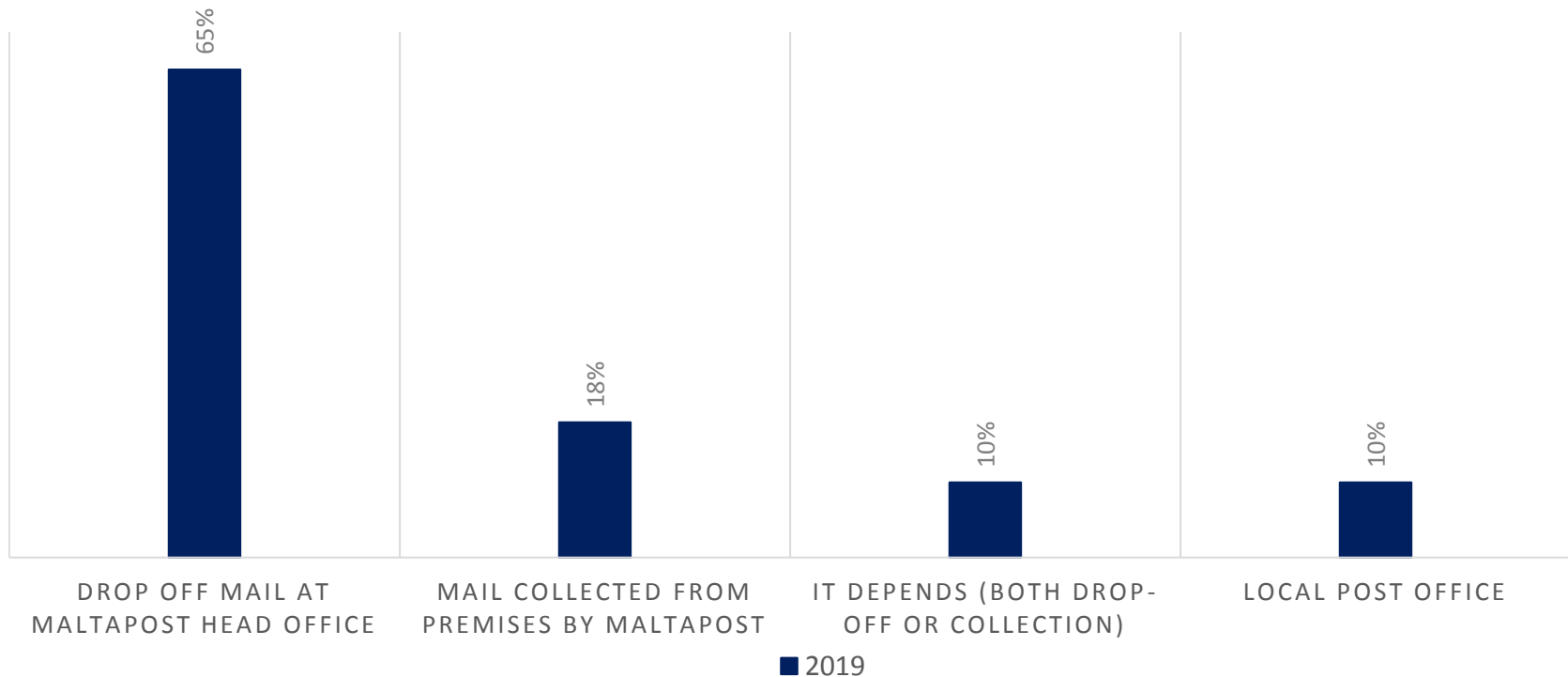
Technology appears to be playing a direct role in influencing bulk mail, particularly online platforms.



Initiating the Bulk Mail Service

Number of Respondents: 40

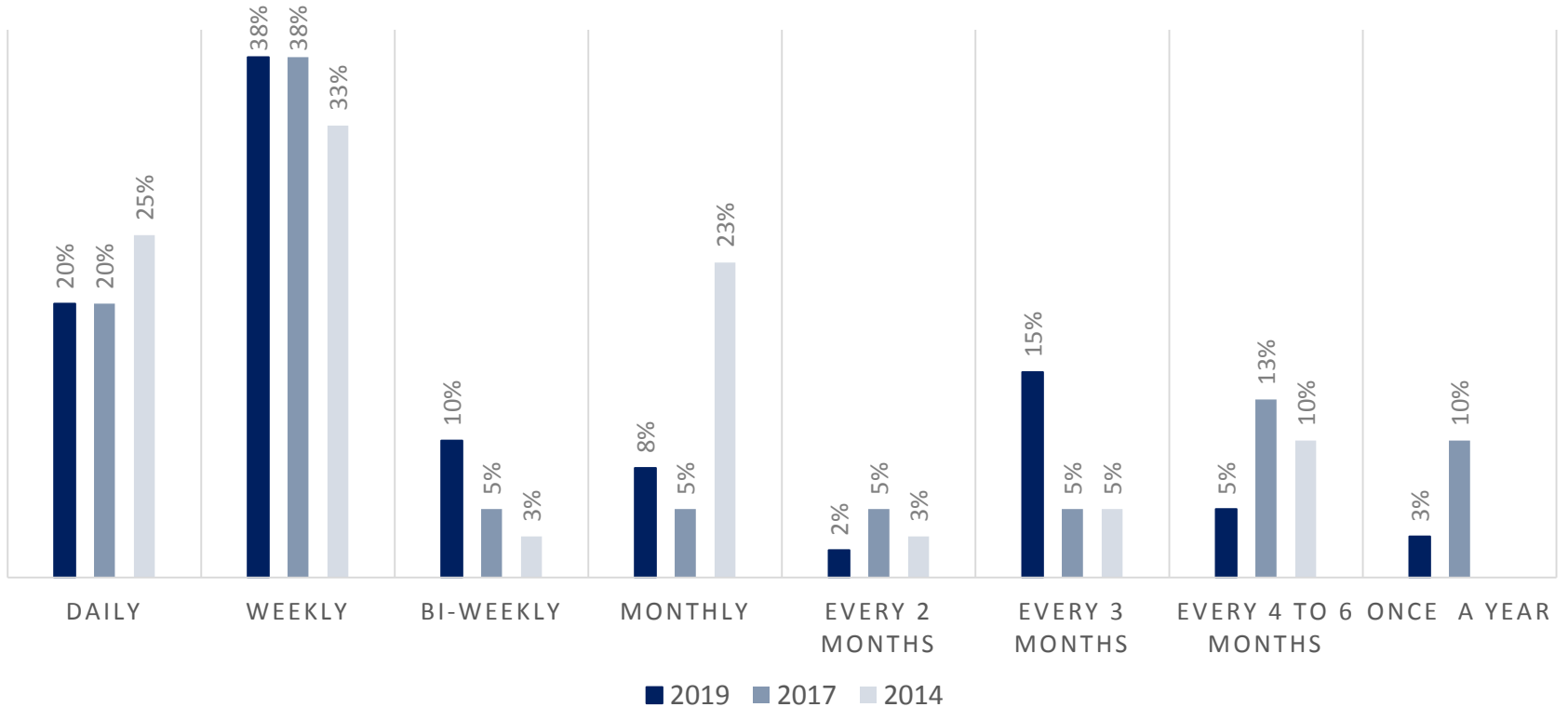
Organisations were asked how they tend to start the process of sending bulk mail. The majority (65%) drop the mail items off at MaltaPost's Head Office themselves.



Frequency of Use of the Bulk Mail Service

Number of Respondents: 40

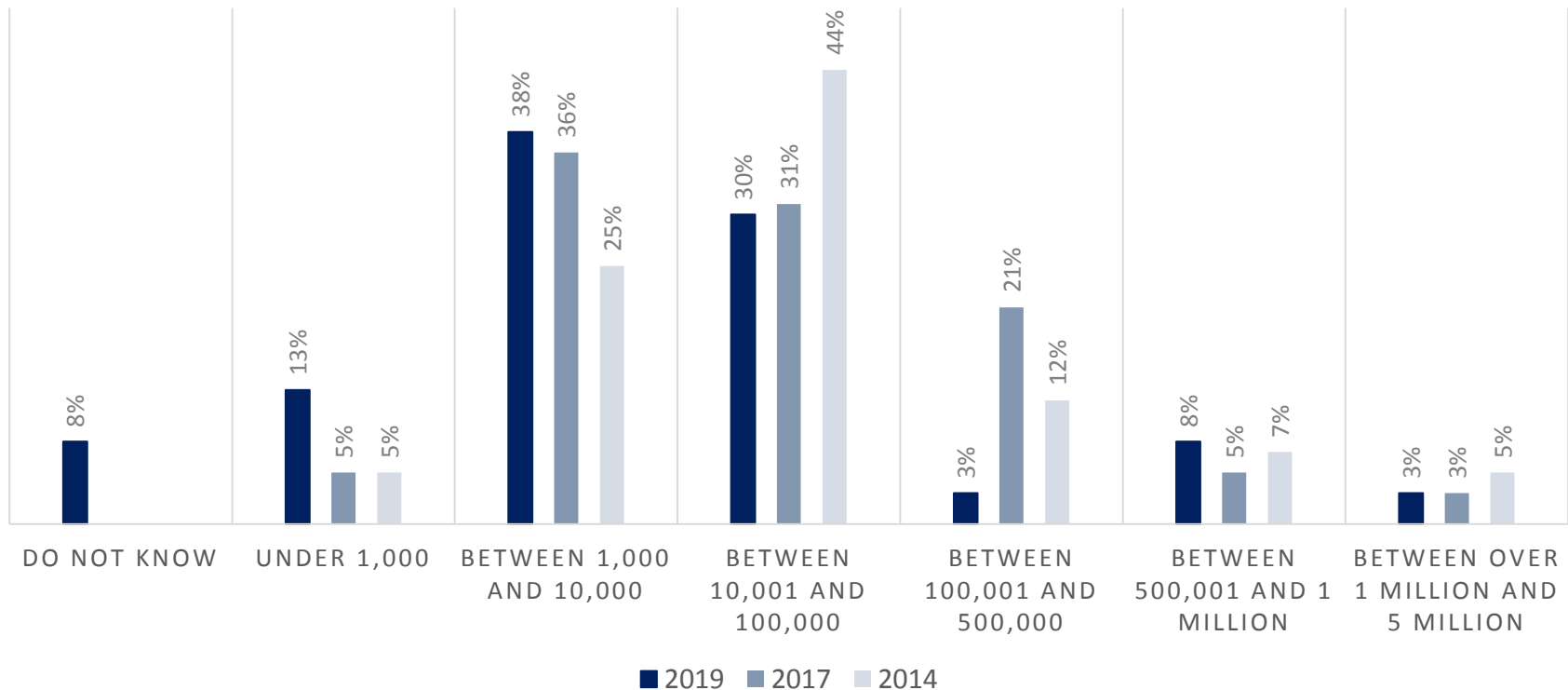
The majority of respondents (58%) make use of bulk mail weekly or daily.



Average Number of Bulk Mail Items Sent Per Year

Number of Respondents: 40 (2019), 40 (2017), 40 (2014)

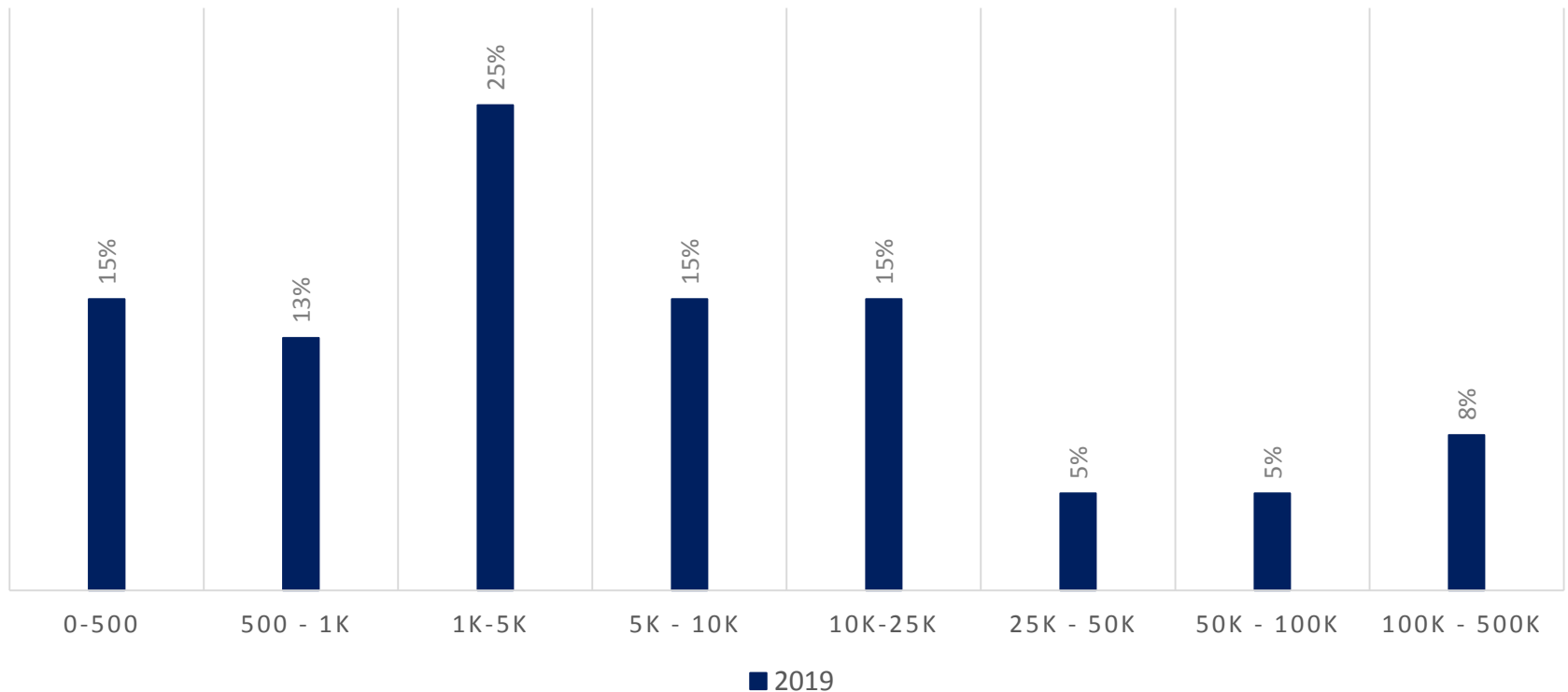
The results are largely comparable to prior years, however a large drop is observed in the 100,000 to 500,000 range from 2017 and 2019 levels.



Average Yearly Expenditure on Bulk Mail

Number of Respondents: 40 (2019). All values are in Euros.

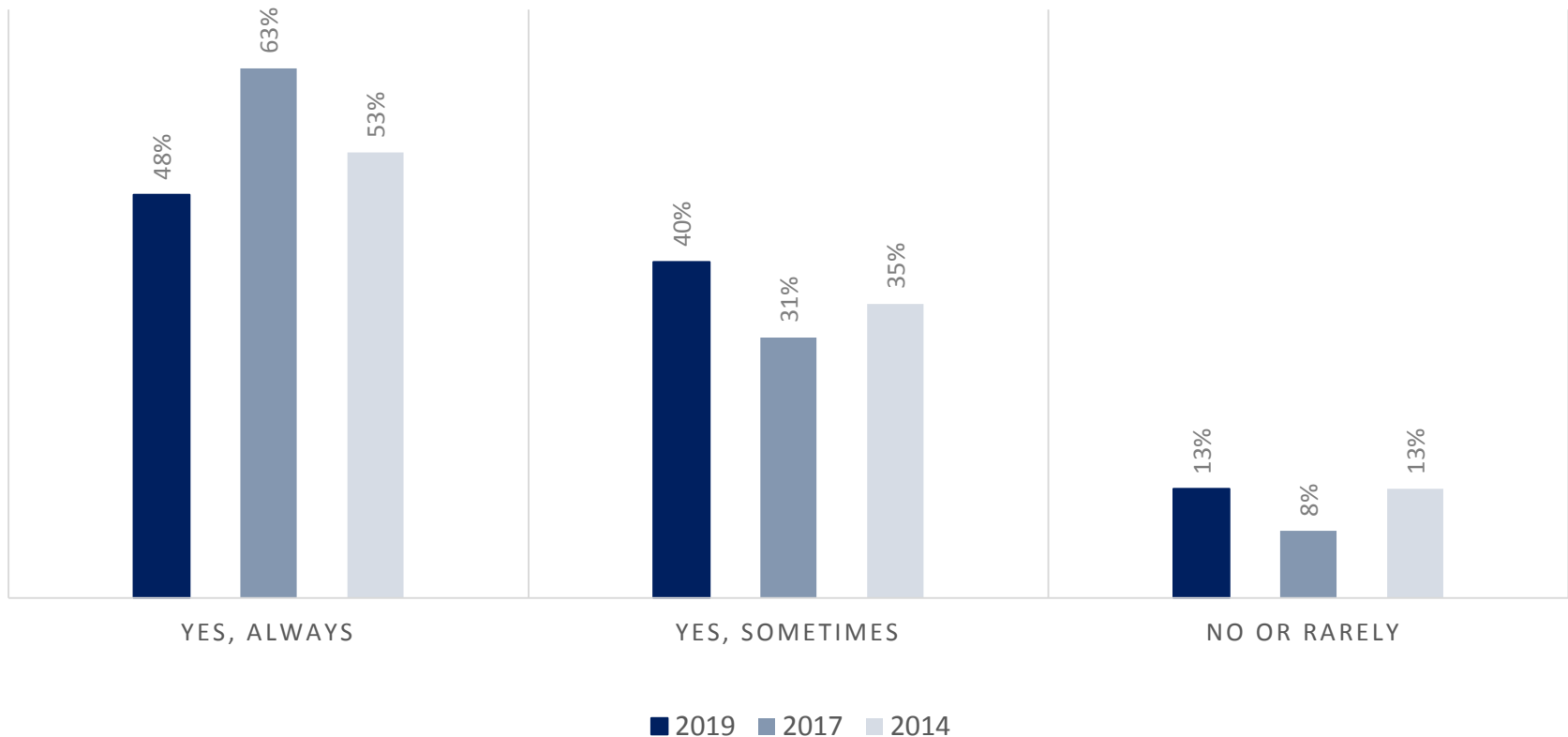
25% of the organisations surveyed claim to spend between 1,000 to 5,000 euros on Bulk Mail and another 30% claim to spend between 5,000 euros to 25,000 euros.



Use of Postcodes

Number of Respondents: 40 (2019), 40 (other years)

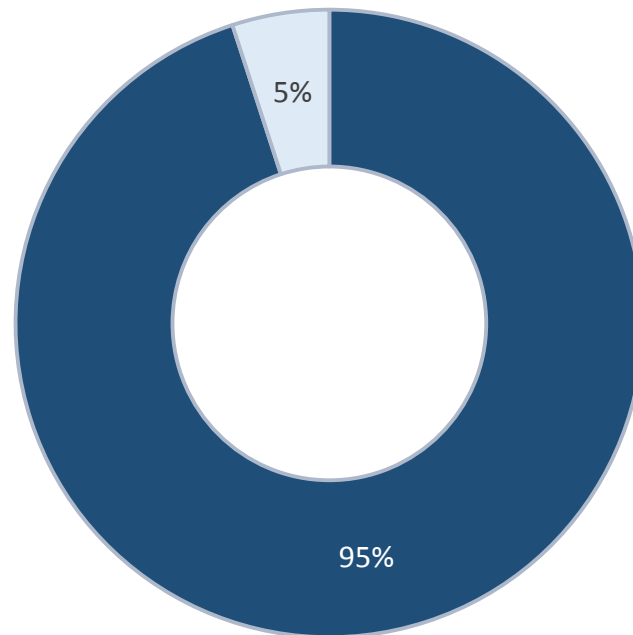
48% of bulk mailers always use the postcode when sending mail; 13% claim that they do not or rarely use the postcode.



Intention to Use MaltaPost Bulk Mail Service in The Next 12 Months

Number of Respondents: 40 (2019)

Only 2 bulk-mailers out of the 40 interviewed say that they plan to stop using MaltaPost's Bulk Mail Service over the next 12 months

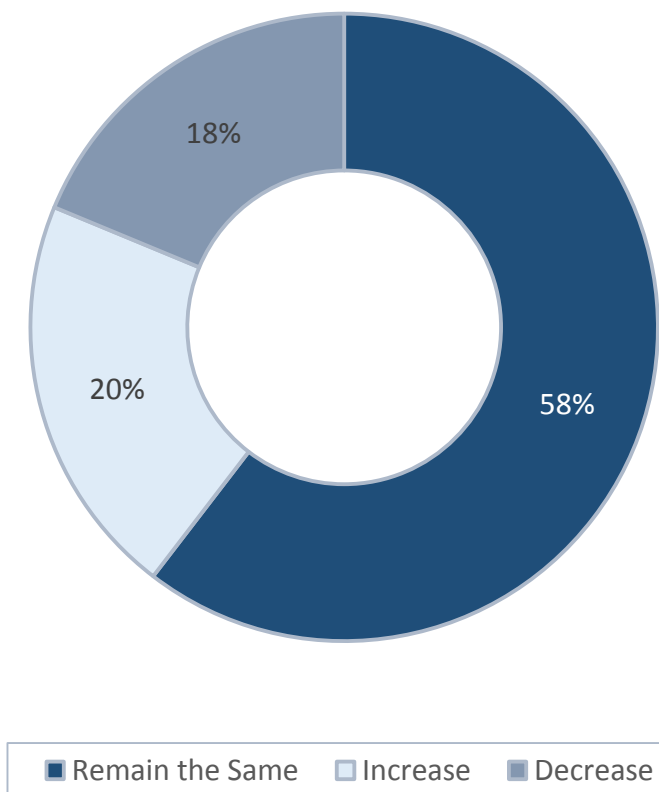


■ Yes ■ No

Expected Future Usage of MaltaPost's Bulk Mail Service Over the Next 12 Months

Number of Respondents: 40 (2019)

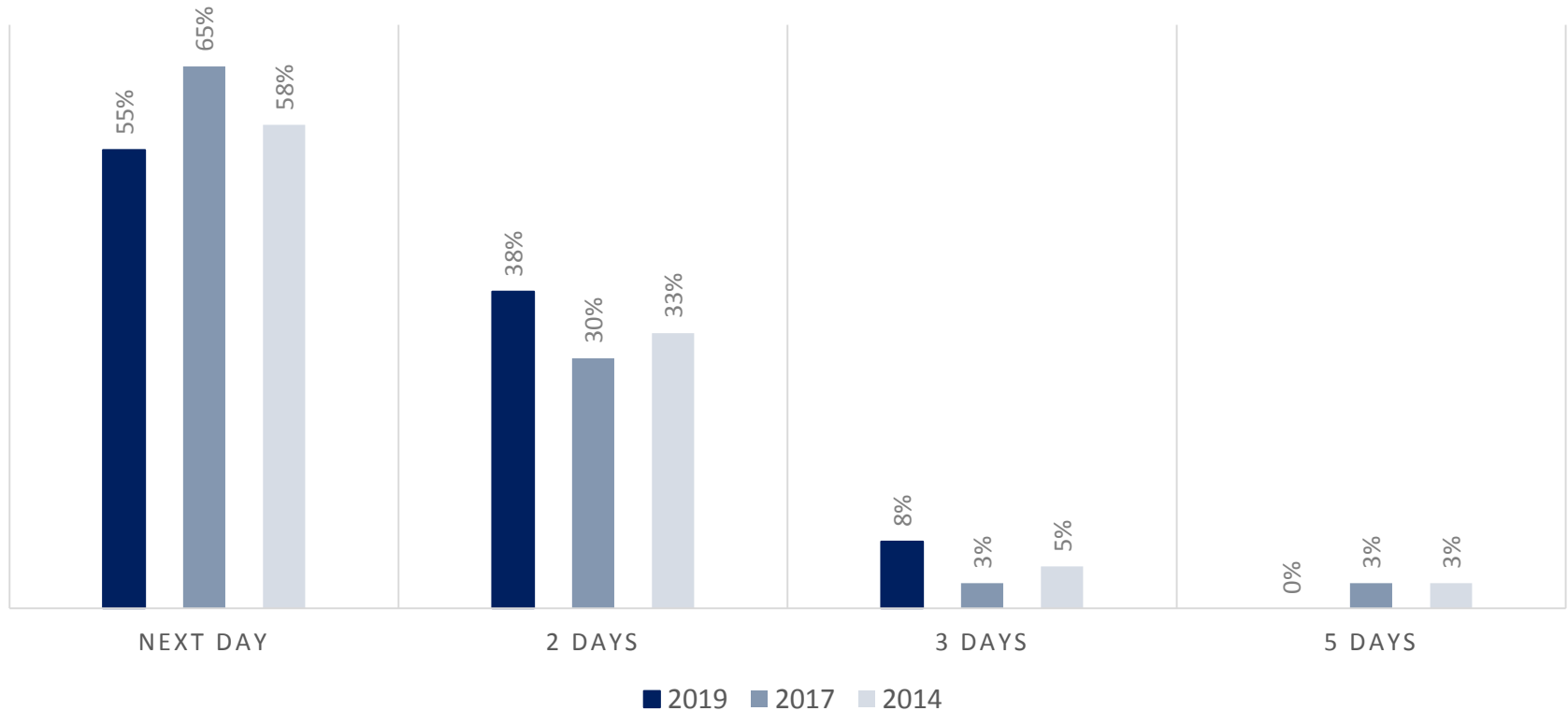
58% of organisations interviewed expect usage of the bulk mail service to remain the same, while 18% expect the use of Bulk Mail services to decrease.



Acceptable Lead-Time From Posting to Delivery

Number of Respondents: 40 (2019), 40 (2017), 40 (2014)

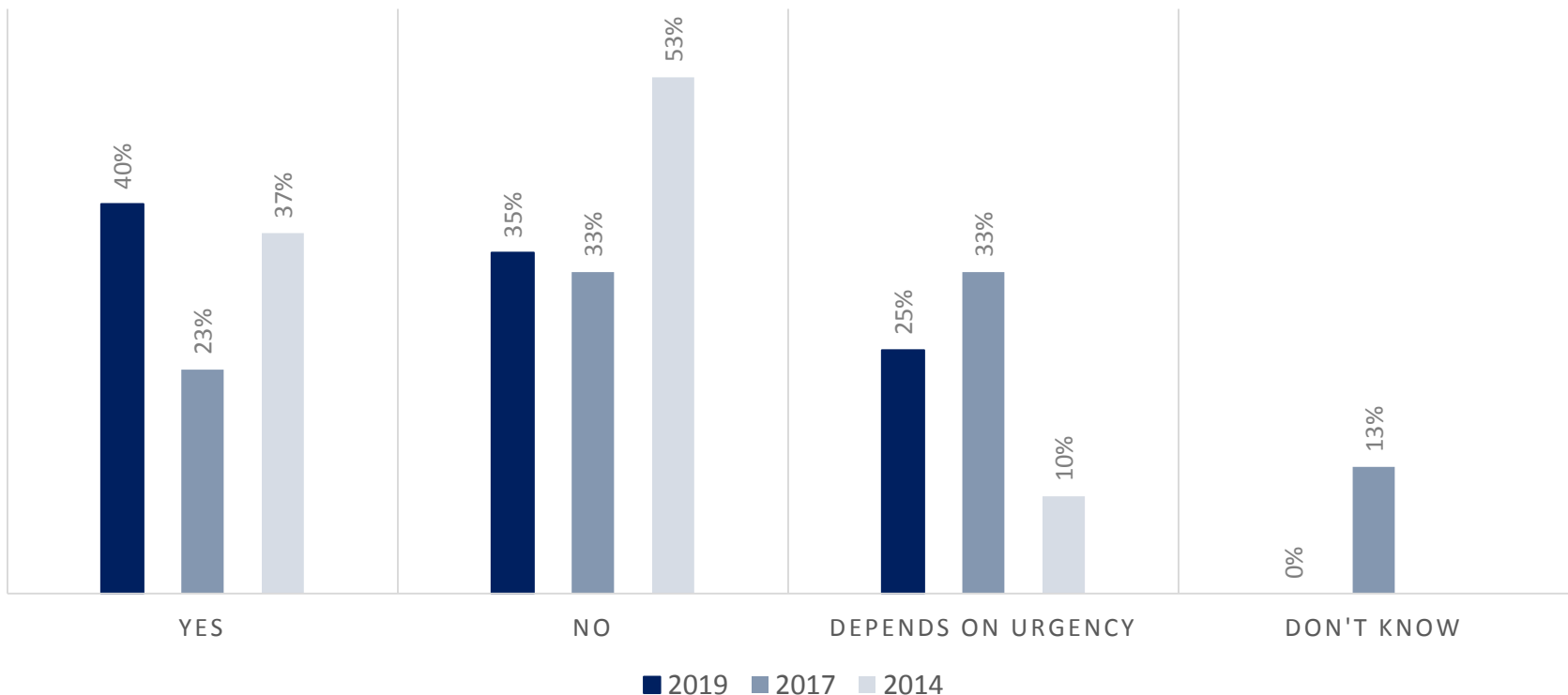
Preferences for acceptable lead times have not changed drastically since 2017.



Preference for Deferred Service for Cheaper Prices

Number of Respondents: 40 (2019), 40 (2017), 40 (2014)

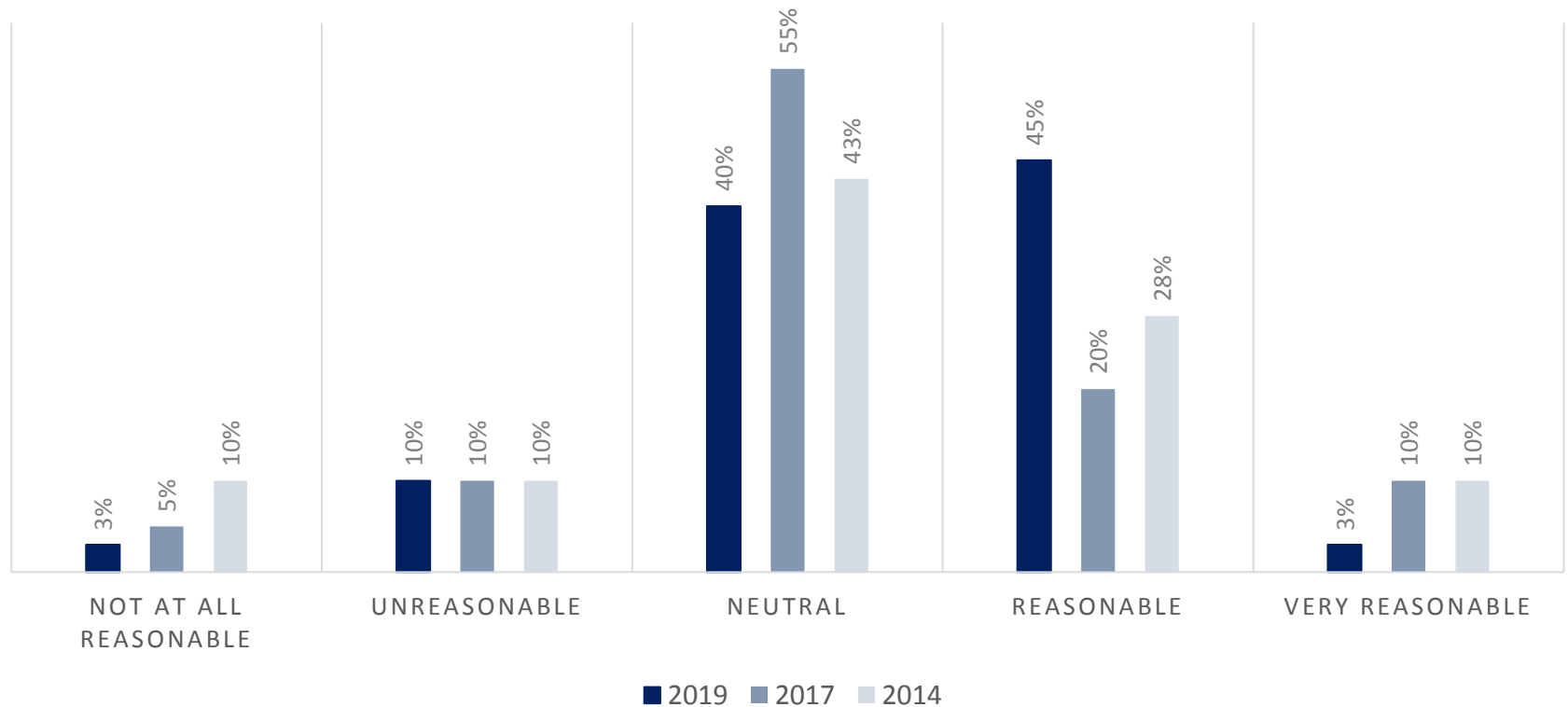
More bulk mailers would consider having deferred delivery by 3 days for cheaper prices.



Reasonableness of Bulk Mail Price

Number of Respondents: 40 (2019), 40 (2017), 40 (2014)

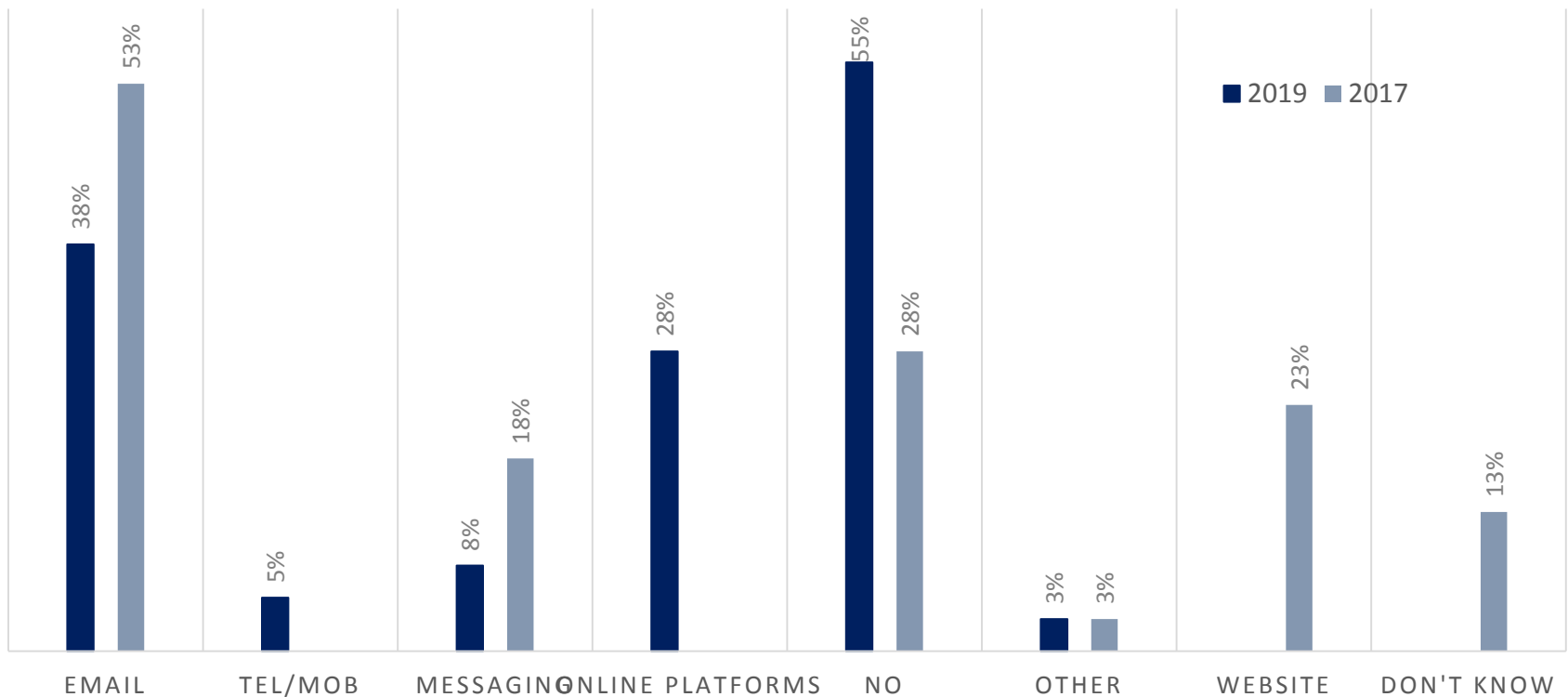
48% of bulk mailers are satisfied with the prices of bulk mail.



Alternatives If Bulk Mail Prices Increase

Number of Respondents: 40 (2019), 40 (2017). Multiple responses were allowed.

When asked which alternatives would be considered if bulk mail prices increased by 5-10%, 55% (an increase from 28% in 2017) said that they would not consider non-postal alternatives.

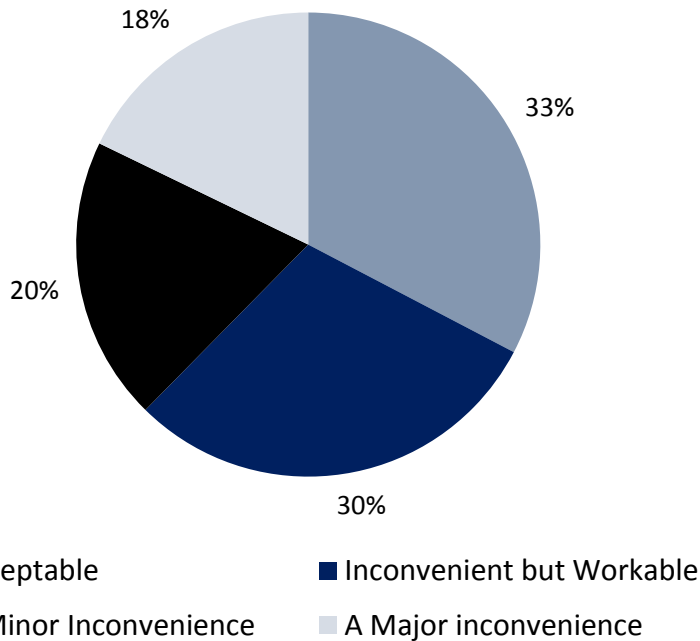


Comparison of 5-day and 6-day Week

Acceptability of 5 Day Week Instead of 6 Day Week

Number of Respondents: 40 (2019)

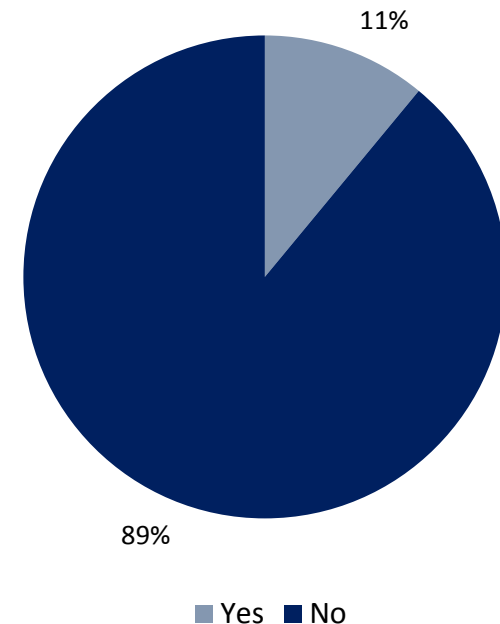
Only 18% would find a 5 day week over a 6 day week to be a major inconvenience



Would Price Increases to Maintain a 6-Day Delivery be Reasonable?

Number of Respondents: 27 (2019)

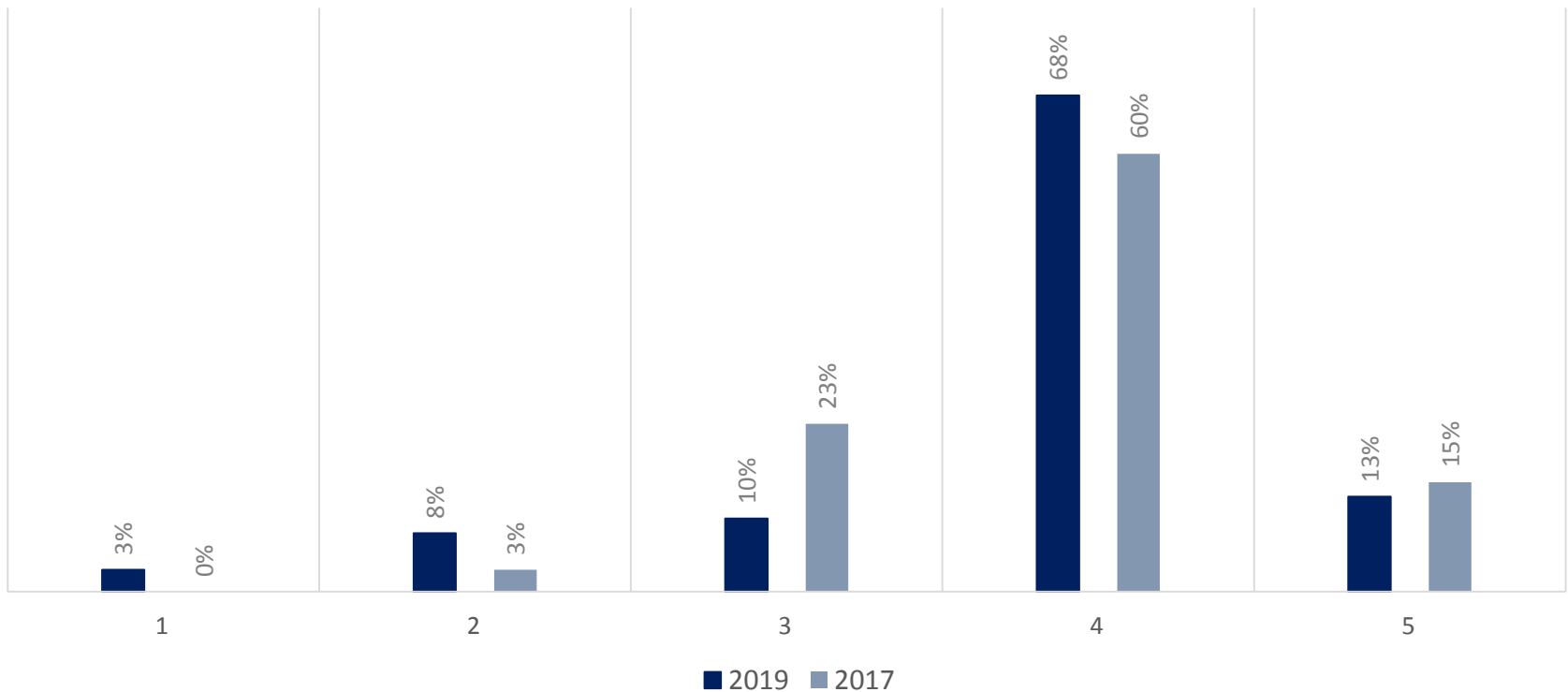
Most of the respondents are not willing to pay more for 6 day bulk mail service



Overall Quality of MaltaPost Postal Services

Number of Respondents: 40 (2019), 40 (2017), 40 (2014). 1= Not at all satisfied, 2= Unsatisfied 3= Neutral 4 = Satisfied 5 = Very Satisfied

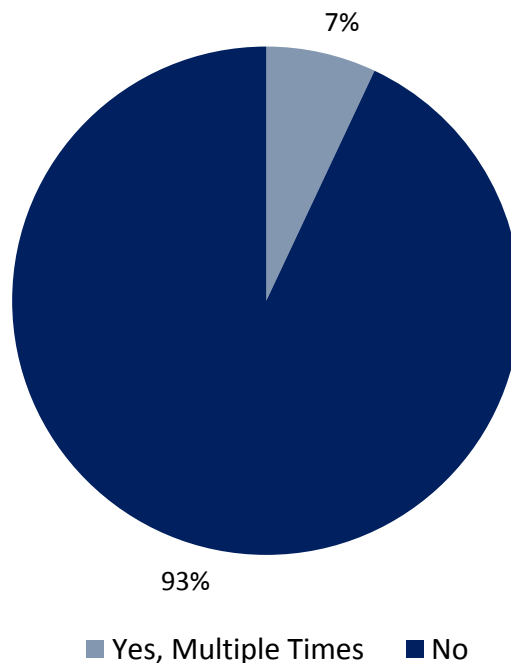
Most respondents (81%) are satisfied or very satisfied with the overall quality of postal services.



Formal Complaints made with MaltaPost (2019 survey)

Number of Respondents: 40 (2019)

93% of bulk mailers surveyed have not made a complaint in the 12 months preceding the survey.



- 48% of bulk mailers claim to be satisfied with the prices of the bulk mail service.
- 55% of bulk mailers are unwilling to switch to non-postal alternatives should the price increase by 5-10%, an increase from the 28% reported in 2017.
- Most of the respondents (83%) find no major issues should MaltaPost deliver bulk mail 5 days a week, instead of 6, as it is today.
- 81% of respondents report being satisfied or very satisfied with the overall service provided by MaltaPost.

- The bulk of the organisations who experienced an increase in addressed letters stated that the reason behind this shift is due to increased business activities, including increased customers, memberships and registrations.
- Respondents who have claimed to be anticipating a decrease in the use of the bulk mail service have attributed email communication as a prime alternative to bulk mail followed by online platforms, social media and messaging services / voice communications.
- The majority (65%) of organisations claimed that they deposit bulk mail at MaltaPost's head office.
- The majority of the respondents (>50%) make use of the bulk mail service on a regular basis.

- With regard to the average estimated yearly volumes of letters sent through the bulk mail service, the percentages in the range between 1000 and 100,000 letters were largely in line with the result of the 2017 survey. There was however, a drop of 18% from 2017 in the bracket between 100,001 and 500,000 letters sent.
- 48% of bulk mailers claim to always use the post-code whilst 13% never or rarely use it.
- Out of 40 organisations interviewed, two companies claim that they will not use the bulk mail service in the next 12 months.
- The amount of bulk mail sent by the organisations surveyed is not expected to change over the next twelve months for 58% of the respondents.



Thank you

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