

MCA Market Research

Postal Services – Large Bulk Mailers Survey Results

*Malta Communications Authority
March 2012*

Presentation Structure

1. Purpose and methodology
2. Review of postal services provided to large bulk mailers
3. Access to Post office services
4. Consumer satisfaction with MaltaPost's services

1. Purpose & Methodology

Purpose

- ❑ The key purpose of this study is to assess the extent of Large Bulk Mailers' Satisfaction with the service provided by the Universal Service Provider (USP) – MaltaPost
- ❑ To research the level of services being offered by other postal providers and the extent to which these are being used by large organisations
- ❑ To monitor a number of postal service aspects, namely price levels, quality, access and complaints handling
- ❑ To serve as an additional source of information for regulatory decisions

Methodology (1)

- ❑ The MCA commissioned M. Fsadni & Associates to conduct this survey with **large bulk mailers** throughout the months of January and February 2012
- ❑ Only 0.7% of Malta's business population comprise medium-sized enterprises (336 units), engaging between 50 – 249 employees and large enterprises (81 units), employing 250+ employees. (NSO, 2011)
- ❑ Moreover, not all large businesses use the bulk mail service. With these local realities the selection pool for this survey was quite restrictive
- ❑ A **total of 40 organisations** have been selected to participate in this *face-to-face* survey

Methodology (2)

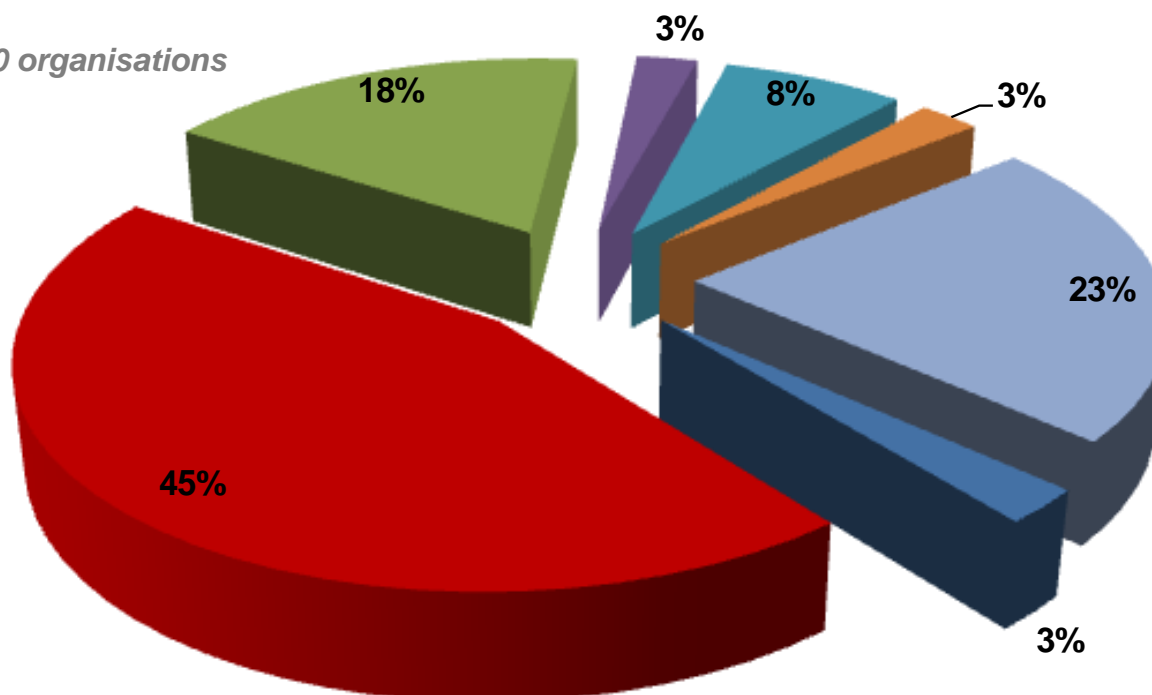
- ❑ Each respondent (on behalf of the business / organisation) was the person responsible for the handling of mail and other postal articles in that business

- ❑ To be eligible to participate in this survey the business / organisation had to be:
 - Using the bulk mail service to send addressed letters; and

 - On average had to send more than 750 addressed letters in a year using this service (thus excluding any one-off users of the bulk mail service)

Surveyed Industries

Sample Size – 40 organisations



- Manufacturing; Agriculture, Hunting & Forestry; Electricity, Gas & Water Supply
- Financial Intermediation, Real Estate & Renting, and Business Activities
- Education
- Health & Social Work
- Other Community, Social and Personal Service Activities
- Wholesale & Retail Trade, Repairs
- Public Administration; Compulsory Social Security

Note: Though this is not a proportional industry distribution of large bulk mailers in Malta it may still be indicative of which industries comprise the largest group of organisations using the bulk mail service on a regular basis (most prominently the financial and business institutions).

2. Review of Postal Services Provided to Large Bulk Mailers

Bulk Mail Service Take-up (1)

How often do you use the bulk mail service and on average what is the estimated volume of addressed letters sent?

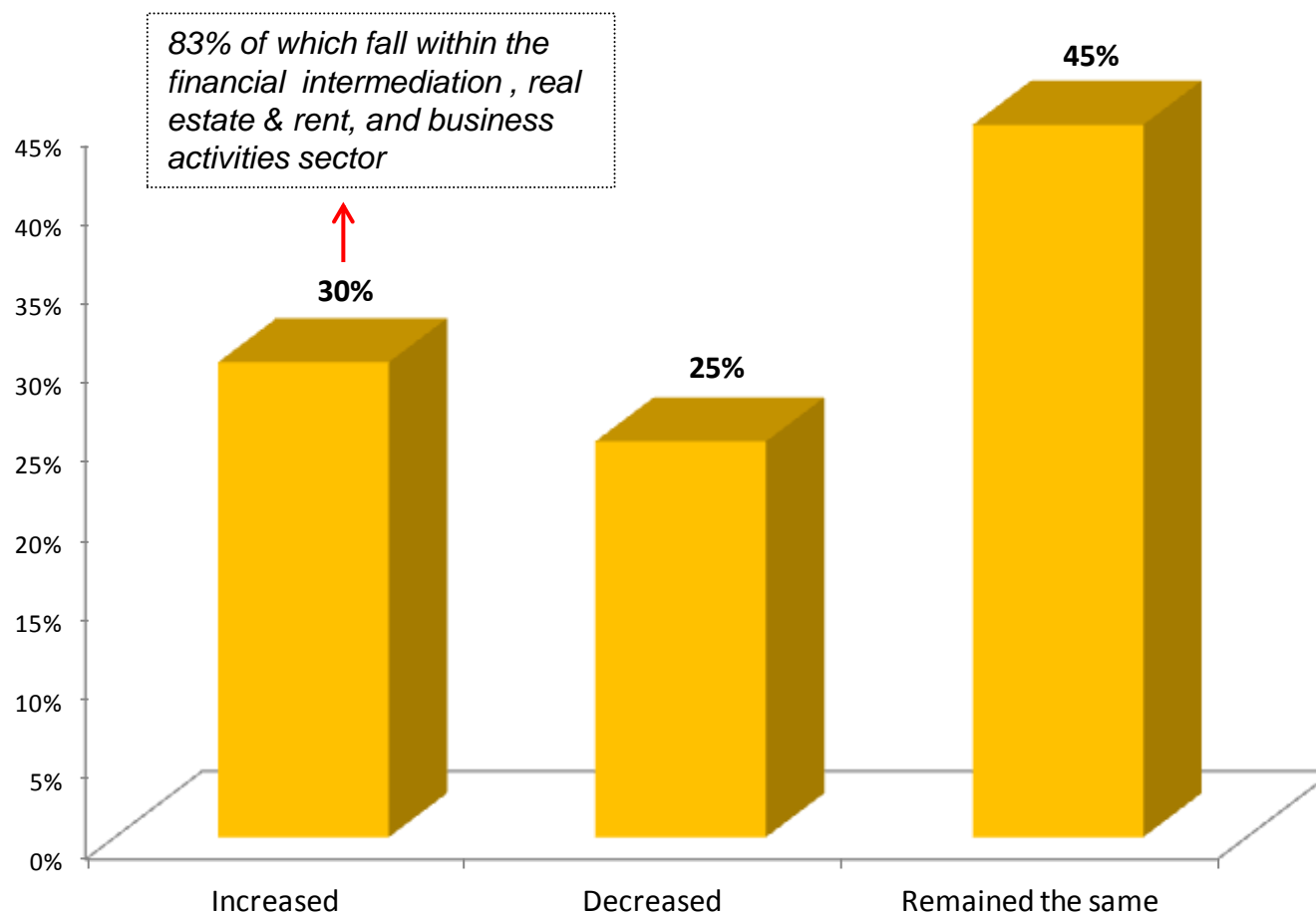
Sample Size – 40 organisations

	Frequency					
	Every week	Every 2 weeks	Every Month	Every 2 Months	Every 3 Months	Every 6 Months
Total Number of Organisations	29	3	3	2	2	1
Number of Addressed Letters Sent						
< 1,000	6	2	2	1	1	1
1,000 - 4,999	9	-	1	1	1	-
5,000 - 10,000	8	-	-	-	-	-
> 10,000	5	1	-	-	-	-
No answer	1	-	-	-	-	-

Bulk Mail Service Take-up (2)

*Did the number of addressed letters **sent** increase, decrease, or remain the same over the past twelve months?*

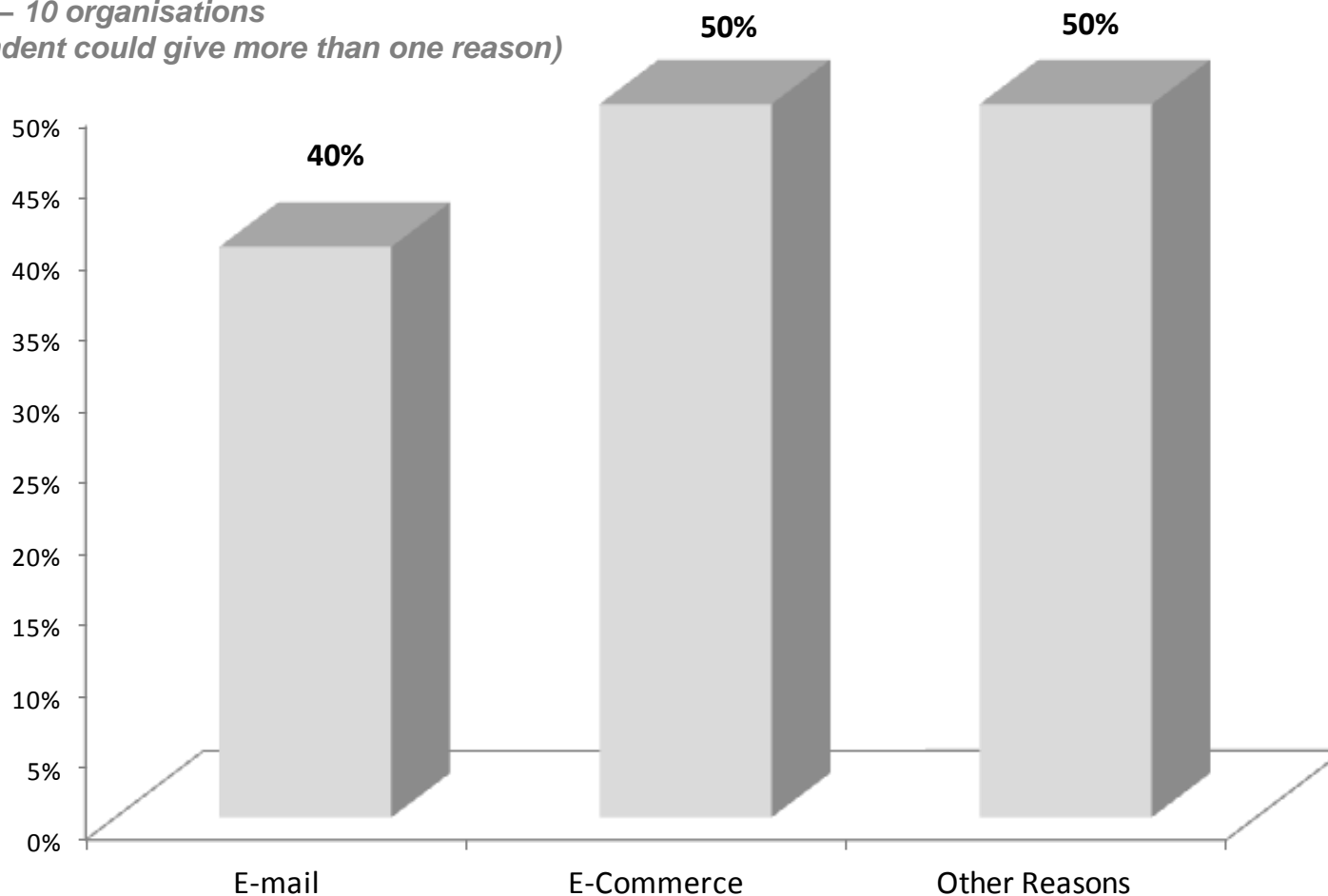
Sample Size – 40 organisations



Bulk Mail Service Take-up (3)

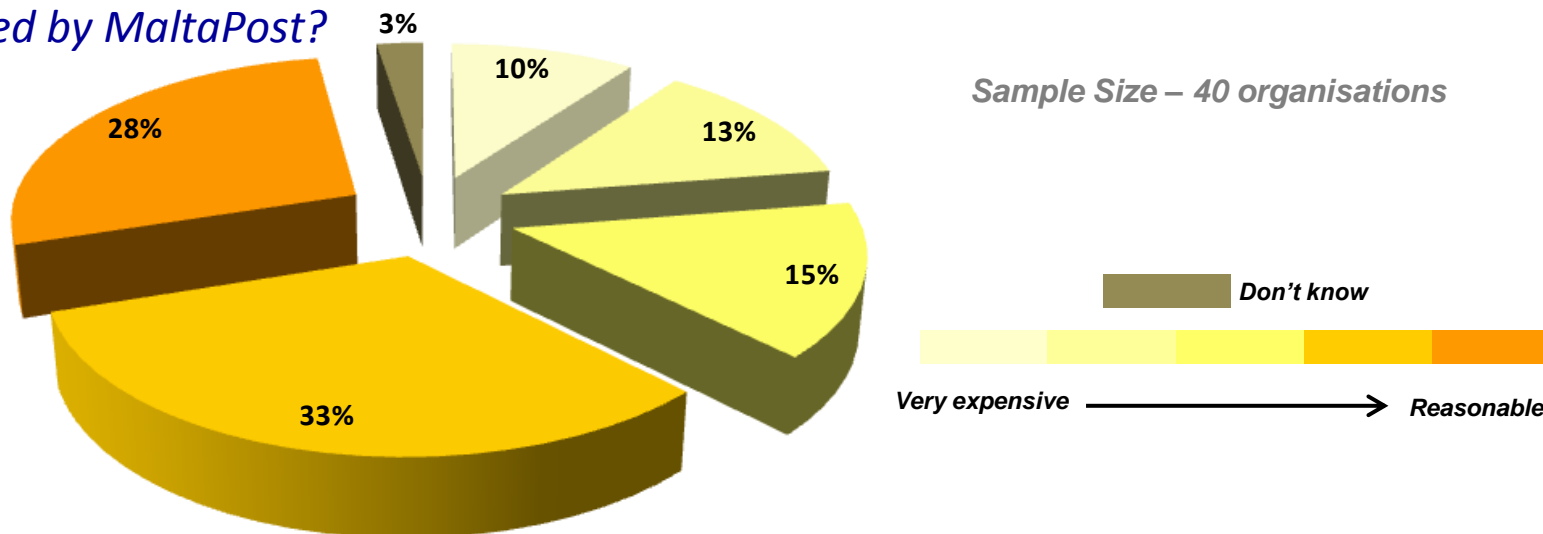
If there was a decrease in the number of addressed letters sent, what are the main reasons?

*Sample Size – 10 organisations
(each respondent could give more than one reason)*



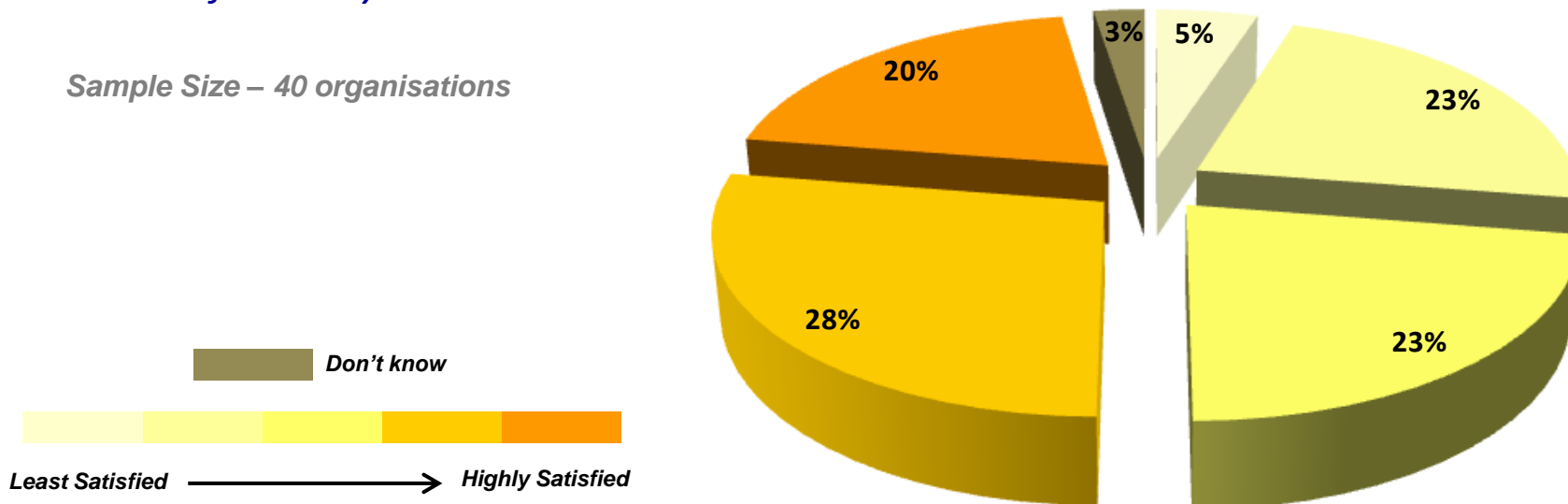
MaltaPost's Bulk Mail Service

How expensive / reasonable do you find the prices of Bulk Mail services provided by MaltaPost?



How satisfied are you with MaltaPost's Bulk Mail services?

Sample Size – 40 organisations



Alternative Postal Operators (1)

In the last twelve months have you used other postal service providers in addition to MaltaPost? (Any postal service)

Sample Size – 40 organisations

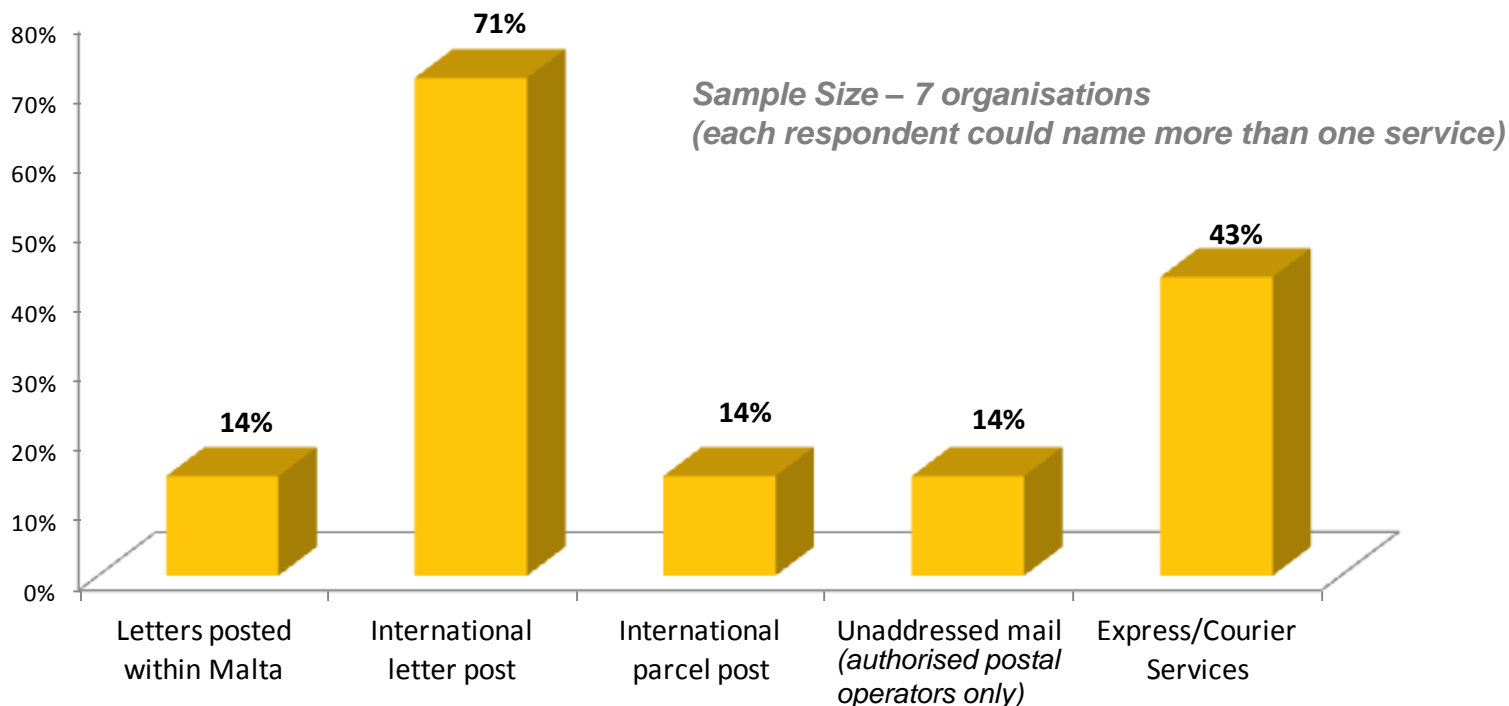


■ Used only MaltaPost

■ Used both MaltaPost and other operators

Alternative Postal Operators (2)

For what services did you use the other postal providers?

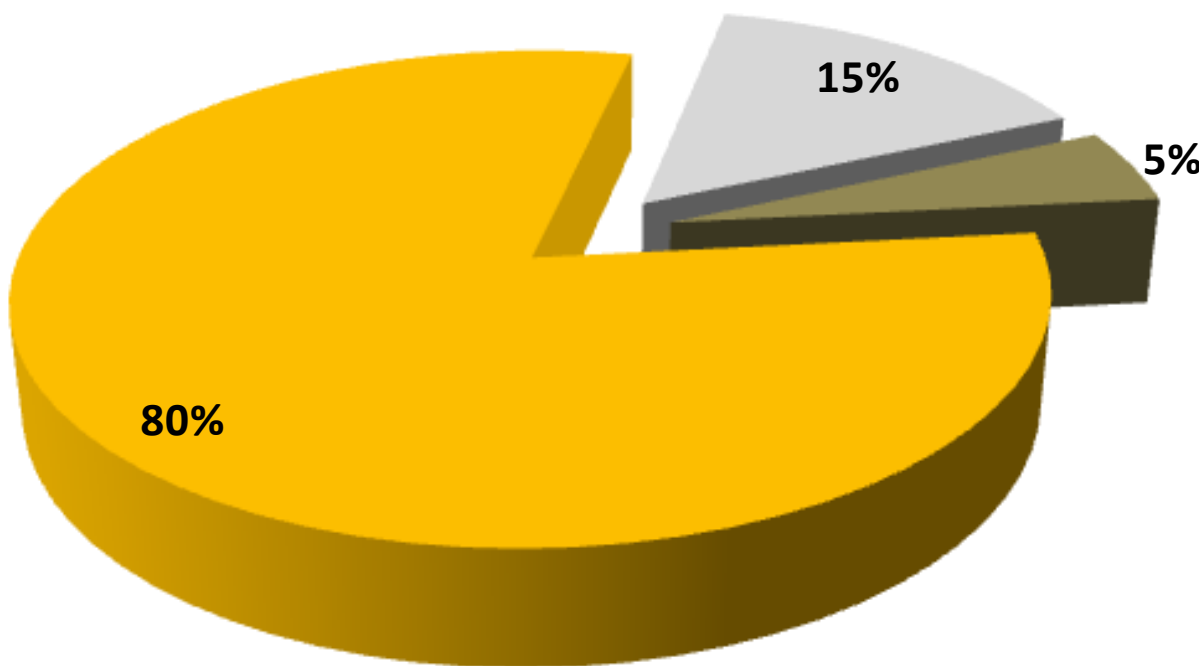


<i>Reasons stated for using other operators' services</i>	<i>% of large bulk mailers who used alternative postal operators</i>
More reliable	14%
Cheaper	29%
Faster	71%
More secure	29%
Easily Accessible	29%

Delivery of Registered Mail

Is the time of day when you receive registered mail convenient to you?

Sample Size – 40 organisations



■ Yes ■ No ■ Don't know

Mornings are the preferred time during the day to receive registered letters, with 68% of respondents say it is the most convenient for their business.

30% of respondents say they have no particular day or time in which they prefer to receive registered letters.

The remaining 2% of businesses say they prefer afternoons.

Businesses' Awareness on Current Post-code Format

Are you aware of the current postcode format?

Sample Size – 40 organisations



■ Yes ■ No

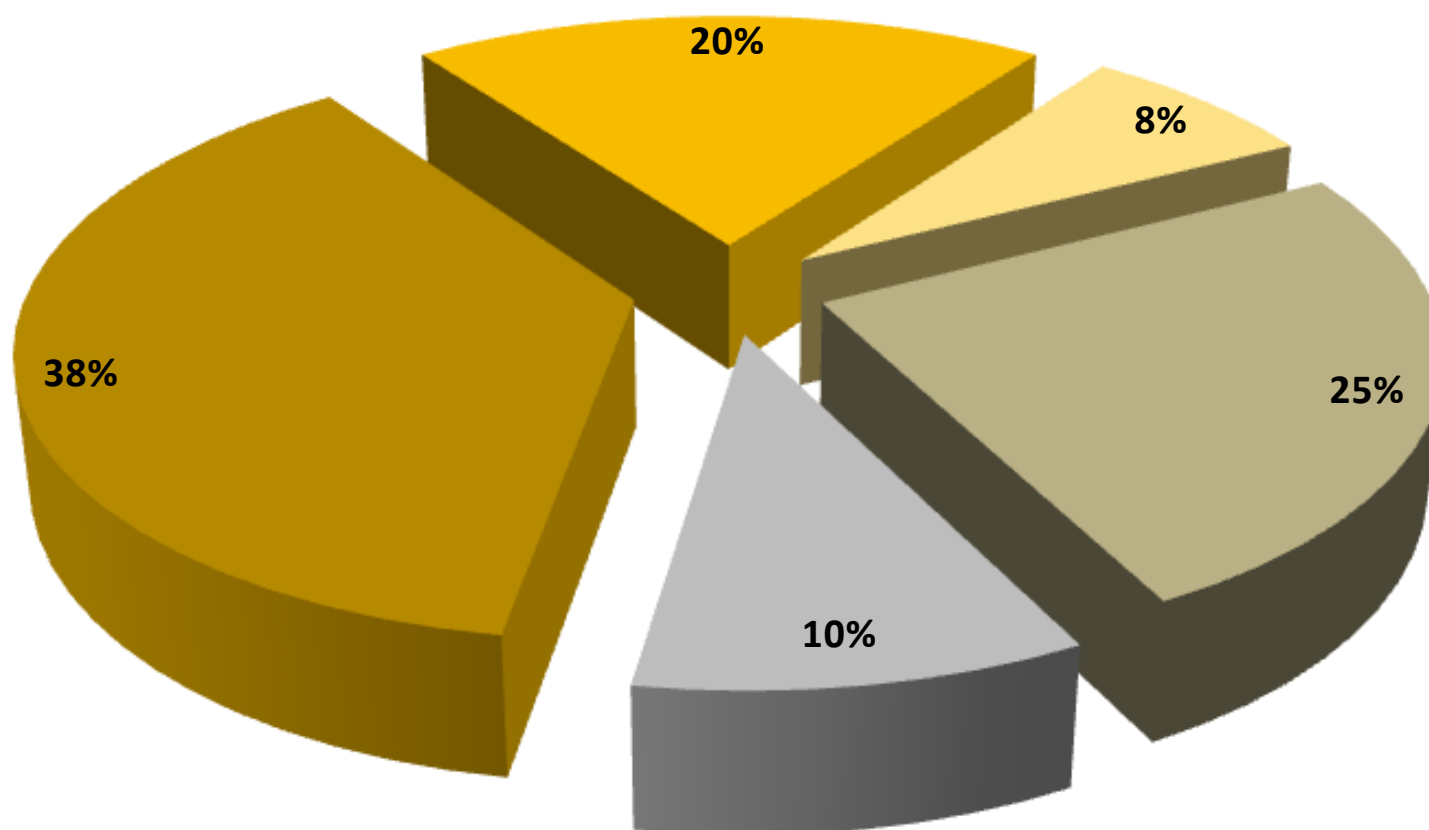
3. Access to Post Office Services

Post Office Activity

In using one of MaltaPost's services during the last twelve months have you been to:

Sample Size – 40 organisations

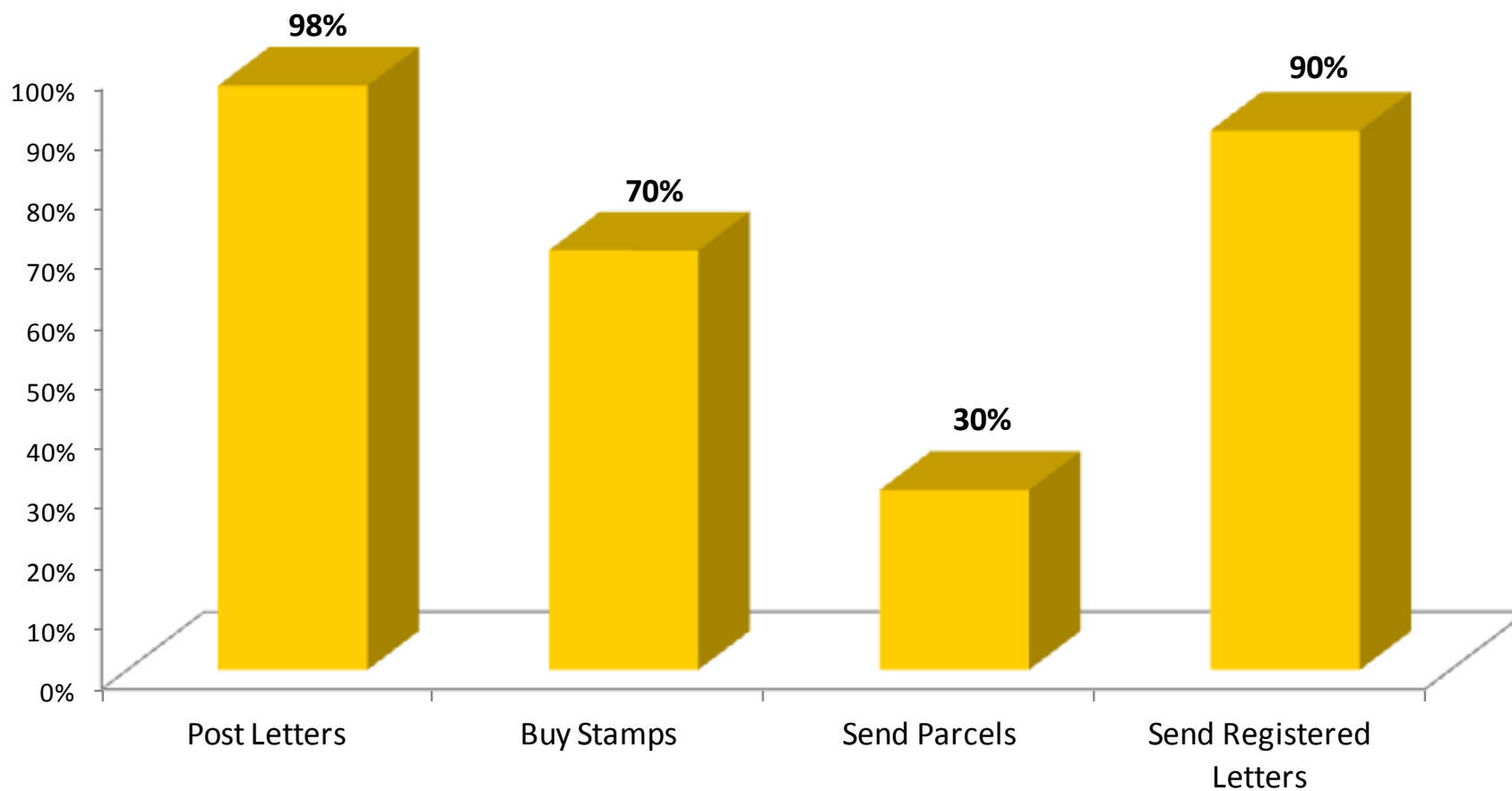
- Malta Post Head Office (Qormi) only
- MaltaPost post office only
- MaltaPost sub-post office only
- Both Head Office & Post office
- Both Head Office & Sub-post office



Services at the Postal Offices

What services have you used from the Post Office?

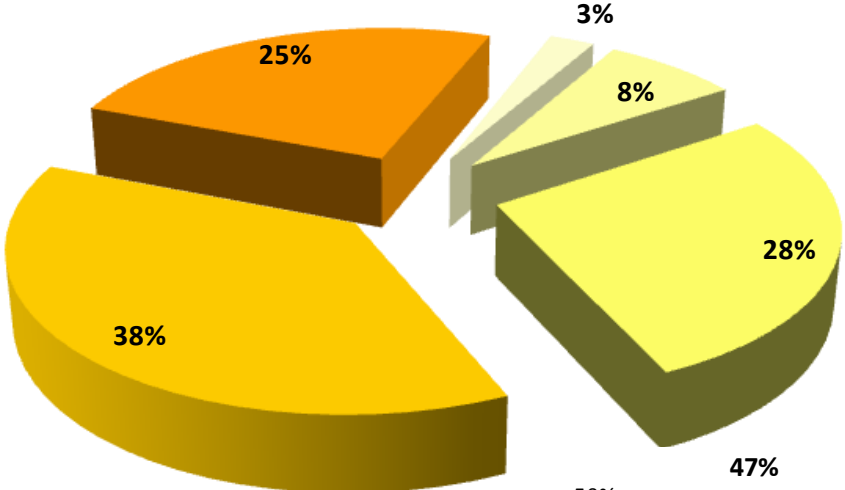
*Sample Size – 40 organisations
(each respondent could give more than one reason)*



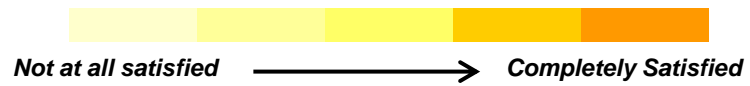
Quality of Service Satisfaction

Are you generally satisfied with the services/facilities provided by the Post Office?

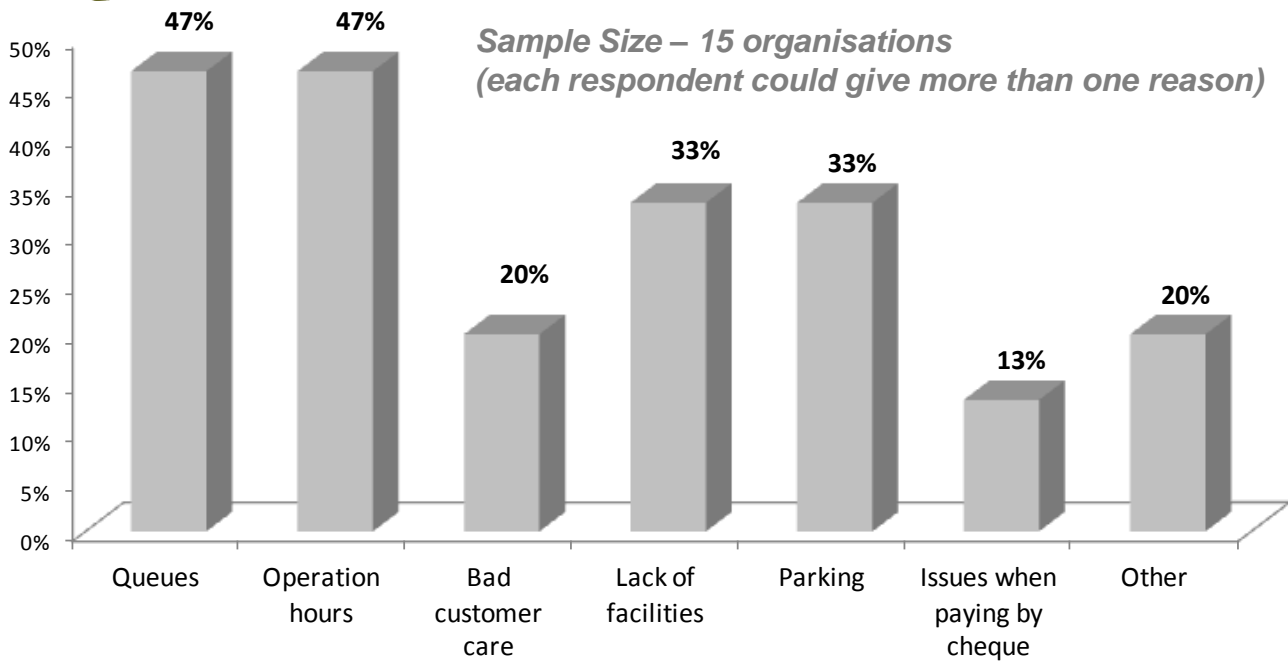
Sample Size – 40 organisations



63% of large bulk mailers visiting a post office are satisfied with the level of services / facilities provided at the post office .



Sample Size – 15 organisations
(each respondent could give more than one reason)



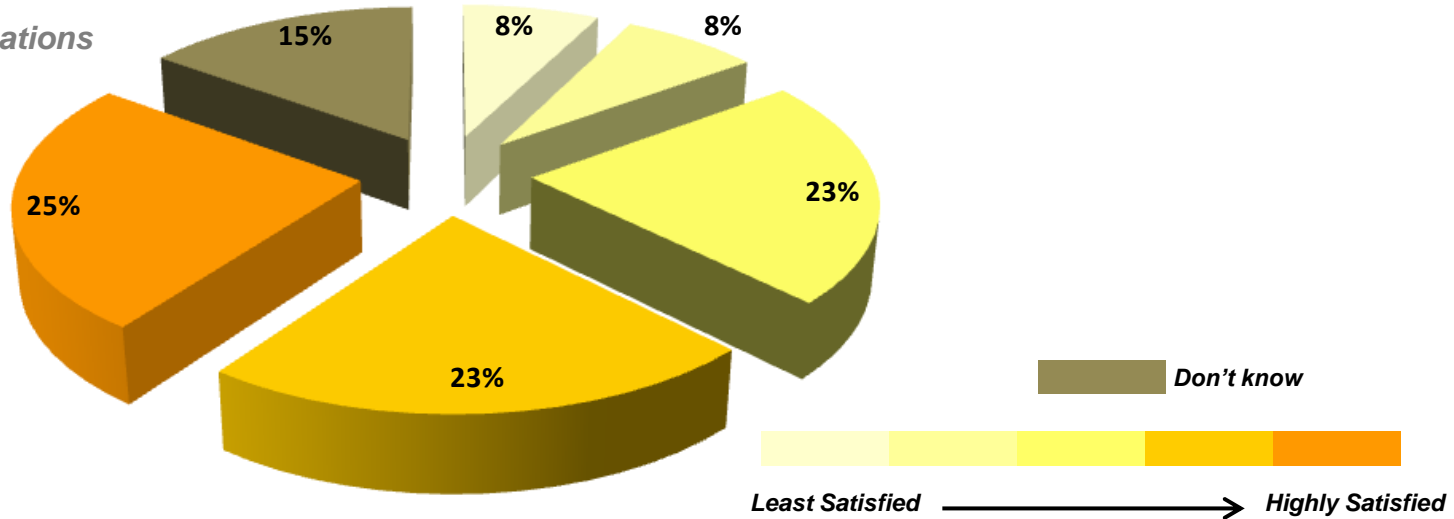
Those that are not satisfied give their reasons ...

4. Consumer Satisfaction with MaltaPost's Services

Satisfaction with...

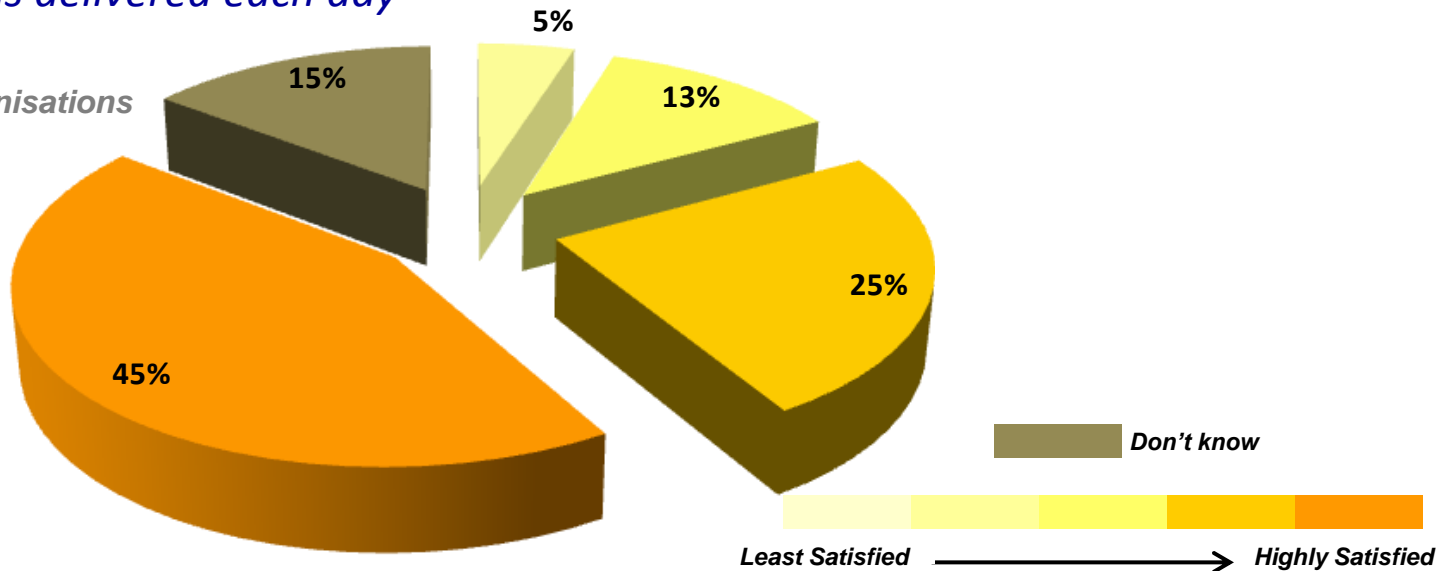
The accessibility to information about the services provided by MaltaPost

Sample Size – 40 organisations



The time your post is delivered each day

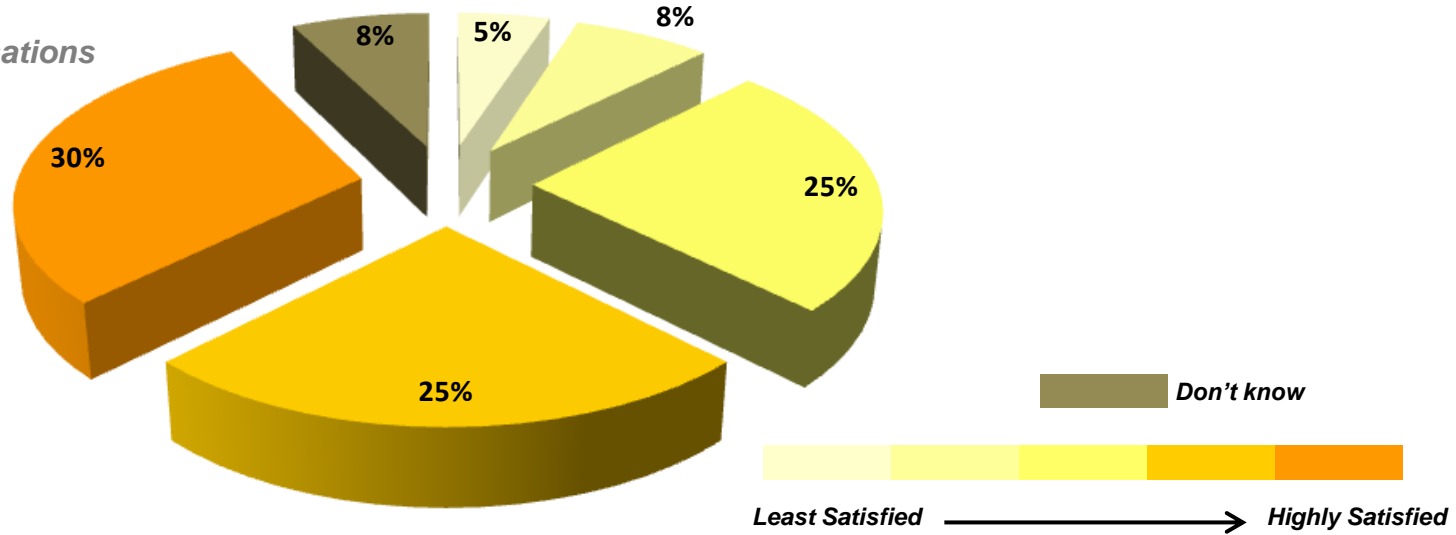
Sample Size – 40 organisations



Satisfaction with...

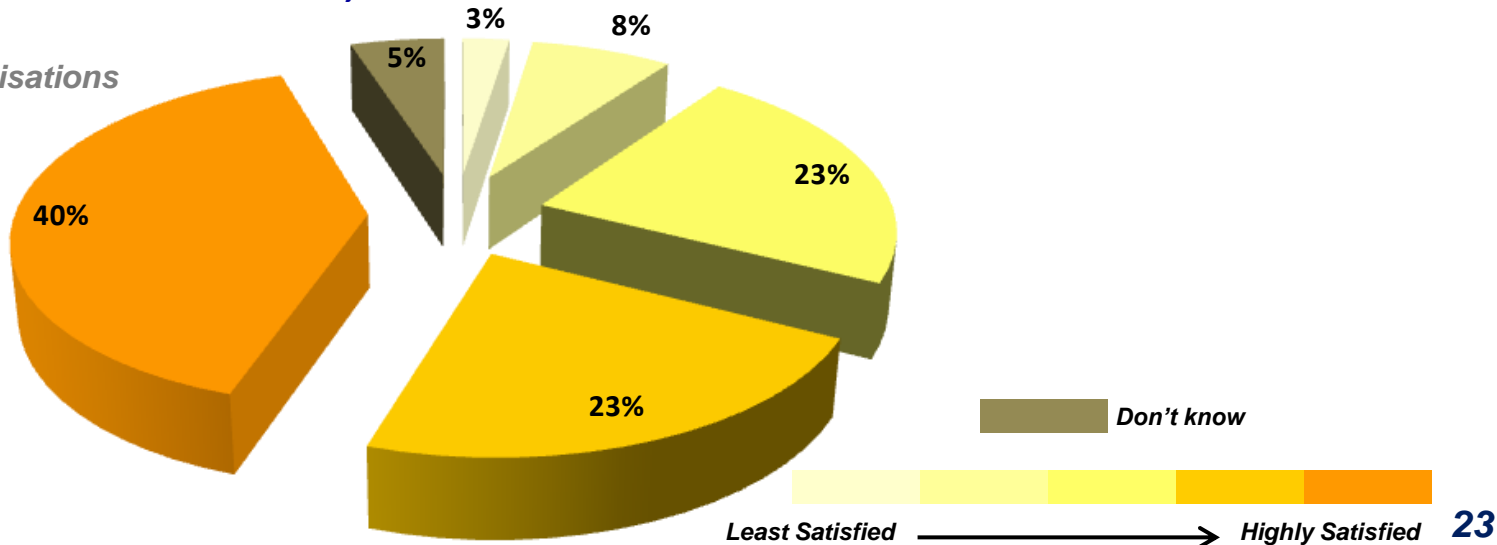
MaltaPost offices' opening and closing times

Sample Size – 40 organisations



The time it takes MaltaPost to deliver your letters

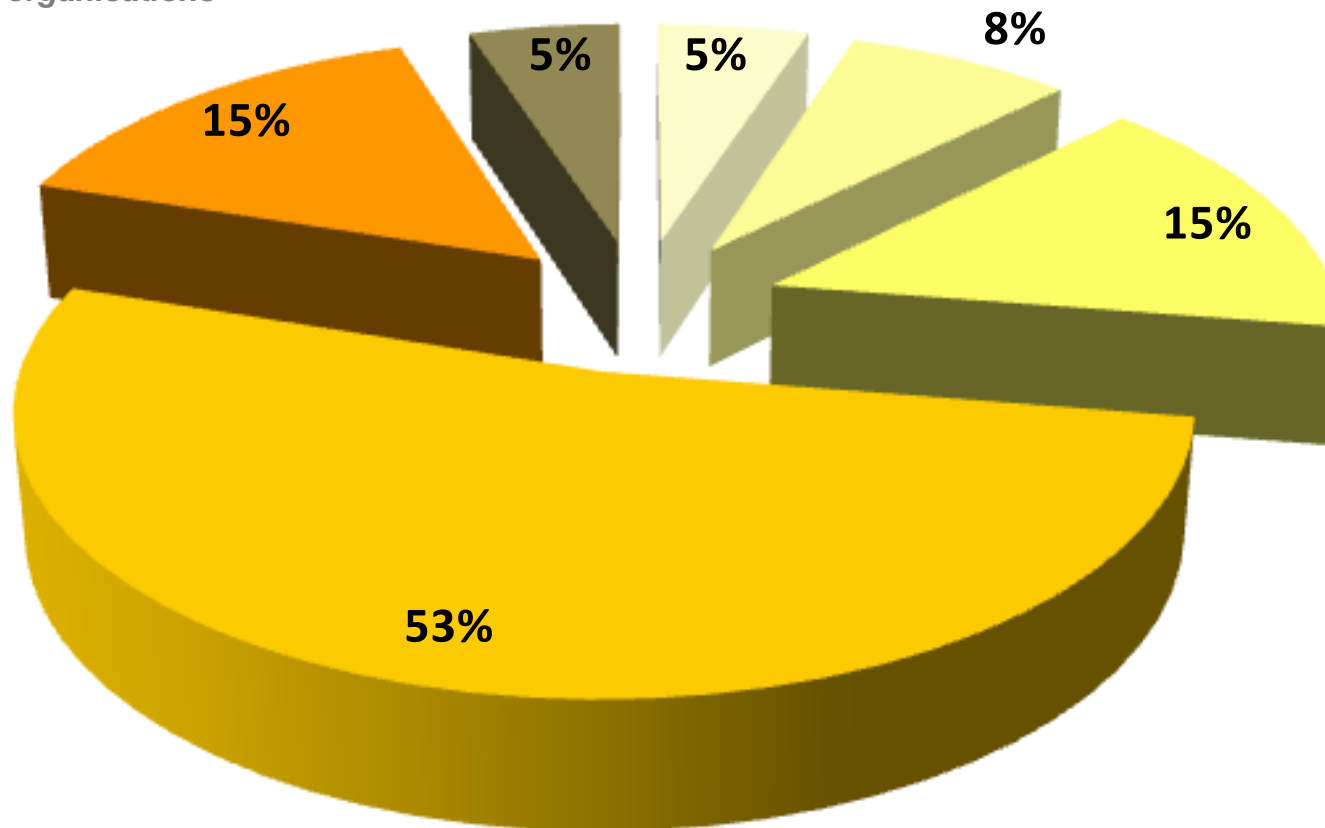
Sample Size – 40 organisations



Satisfaction with...

The latest collection time for next day delivery of your letters

Sample Size – 40 organisations



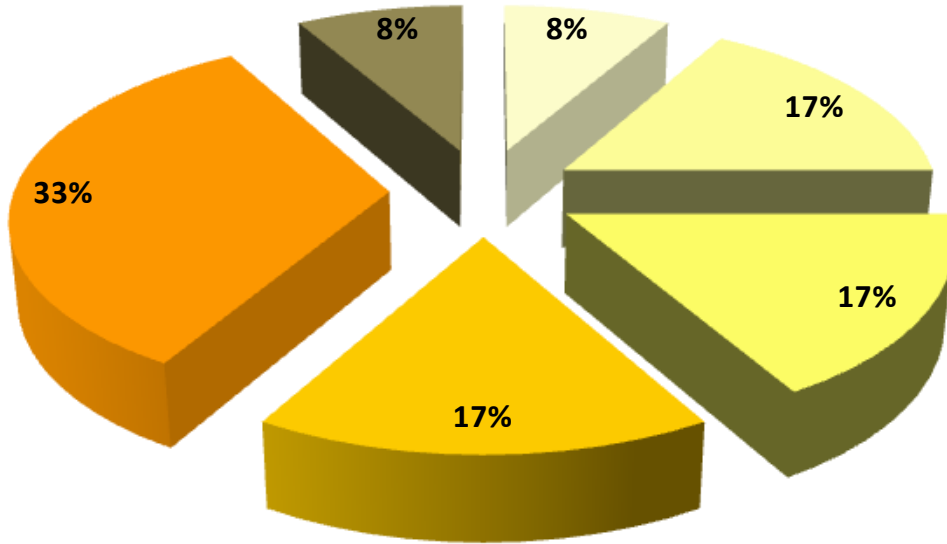
Don't know



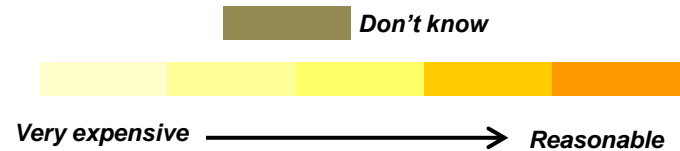
Least Satisfied → Highly Satisfied

MaltaPost's Parcel Service (1)

How expensive / reasonable do you find the prices of parcel post?

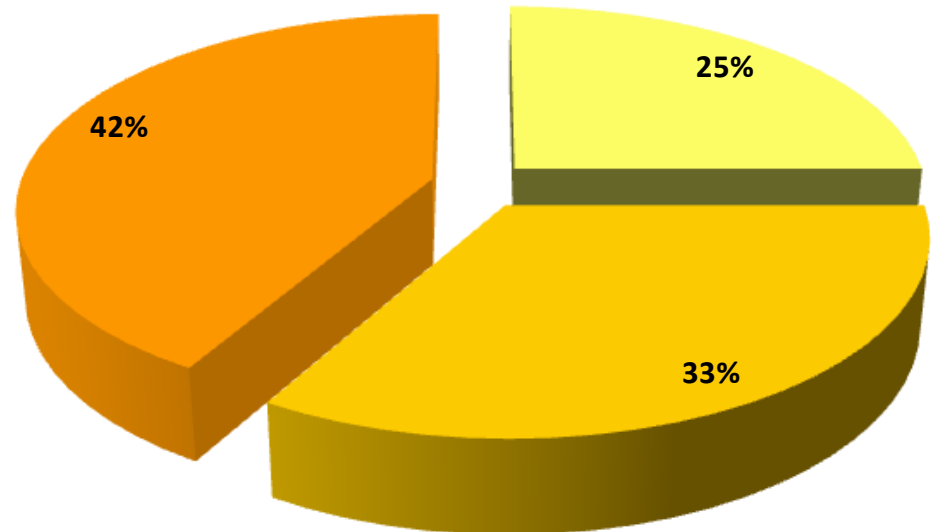


*Sample Size – 12 organisations
(businesses that send parcels)*



How confident are you that your parcels will be delivered safely?

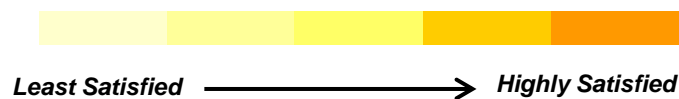
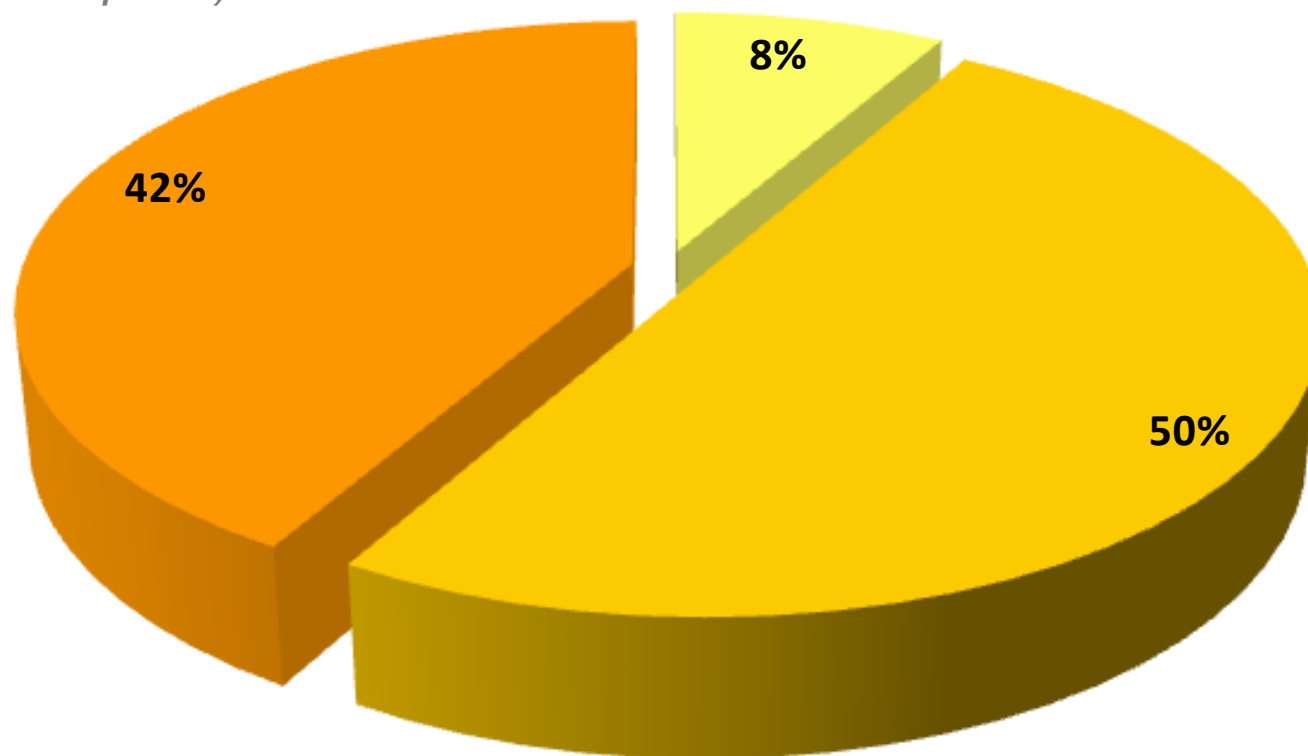
*Sample Size – 12 organisations
(businesses that send parcels)*



MaltaPost's Parcel Service (2)

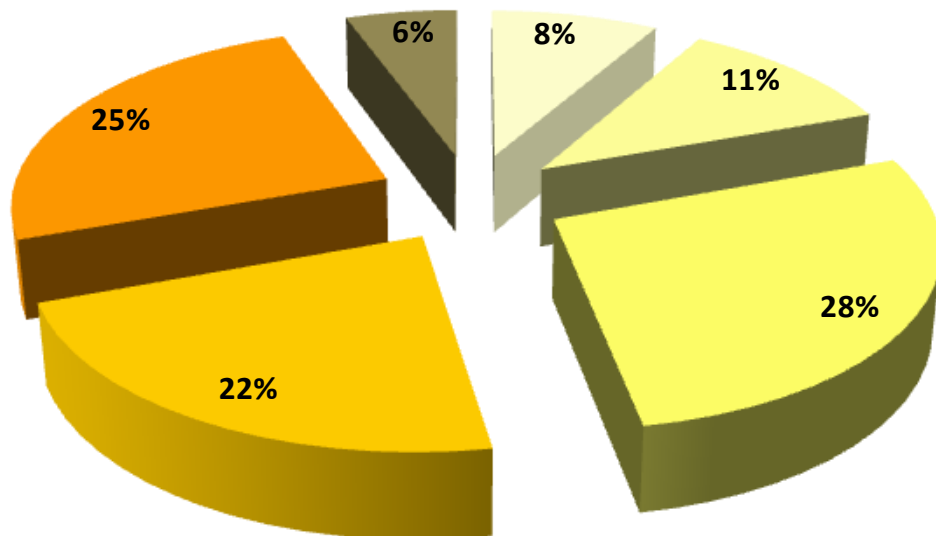
How satisfied are you with MaltaPost's parcel services?

*Sample Size – 12 organisations
(businesses that send parcels)*

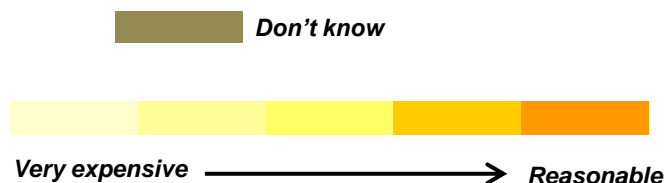


MaltaPost's Registered Mail Service (1)

How expensive / reasonable do you find the prices of registered mail?

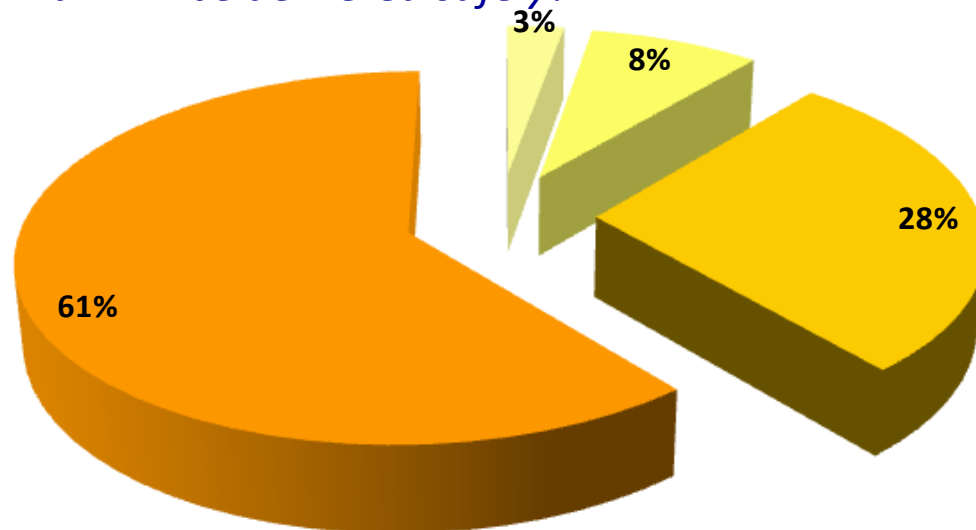
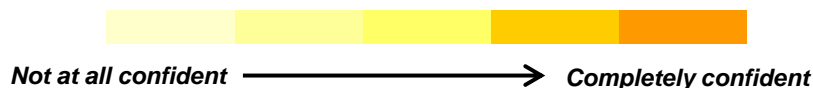


Sample Size – 36 organisations
(businesses that send registered mail)



How confident are you that your registered mail will be delivered safely?

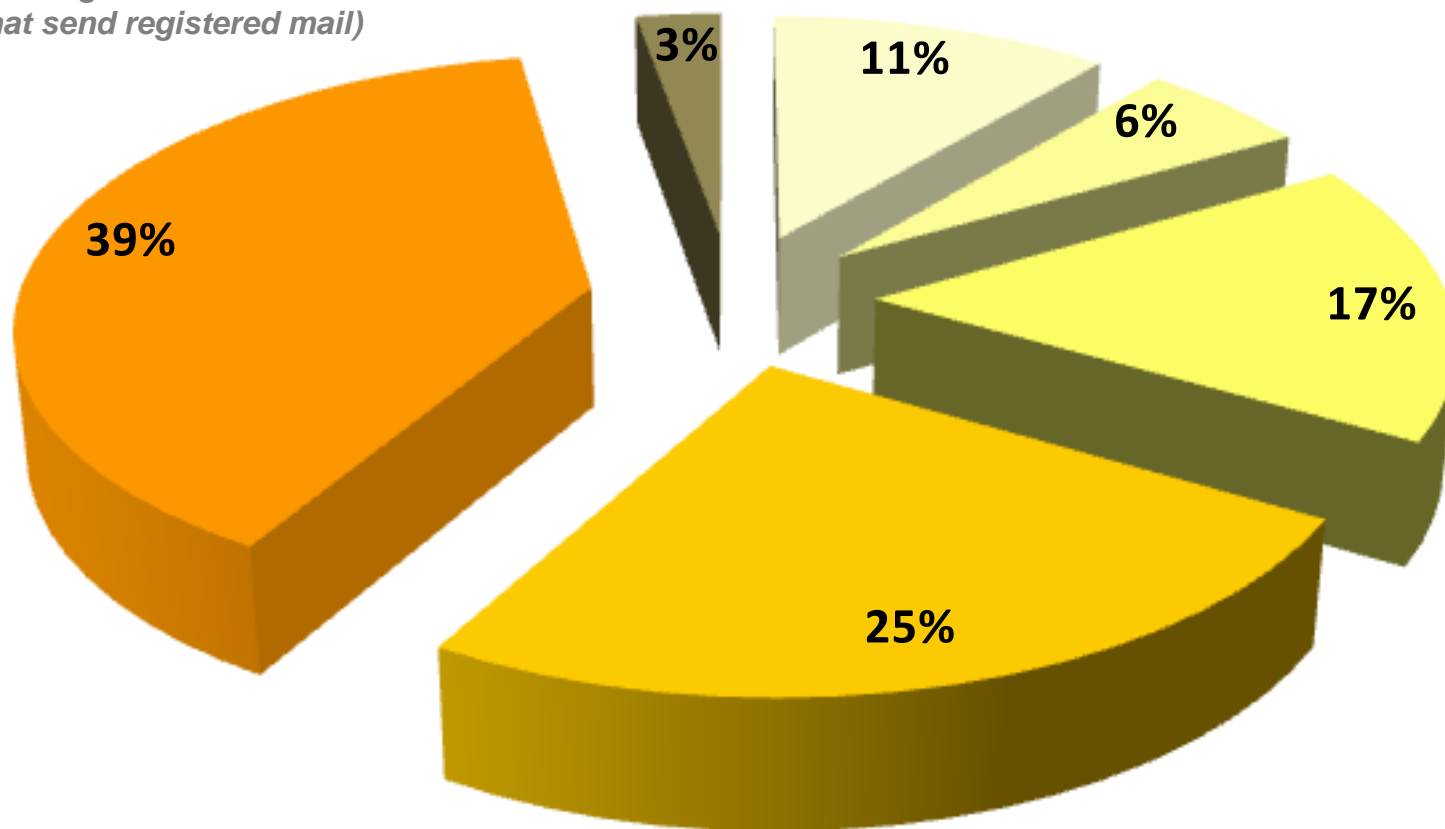
Sample Size – 36 organisations
(businesses that send registered mail)



MaltaPost's Registered Mail Service (2)

How satisfied are you with MaltaPost's registered mail service?

*Sample Size – 36 organisations
(businesses that send registered mail)*



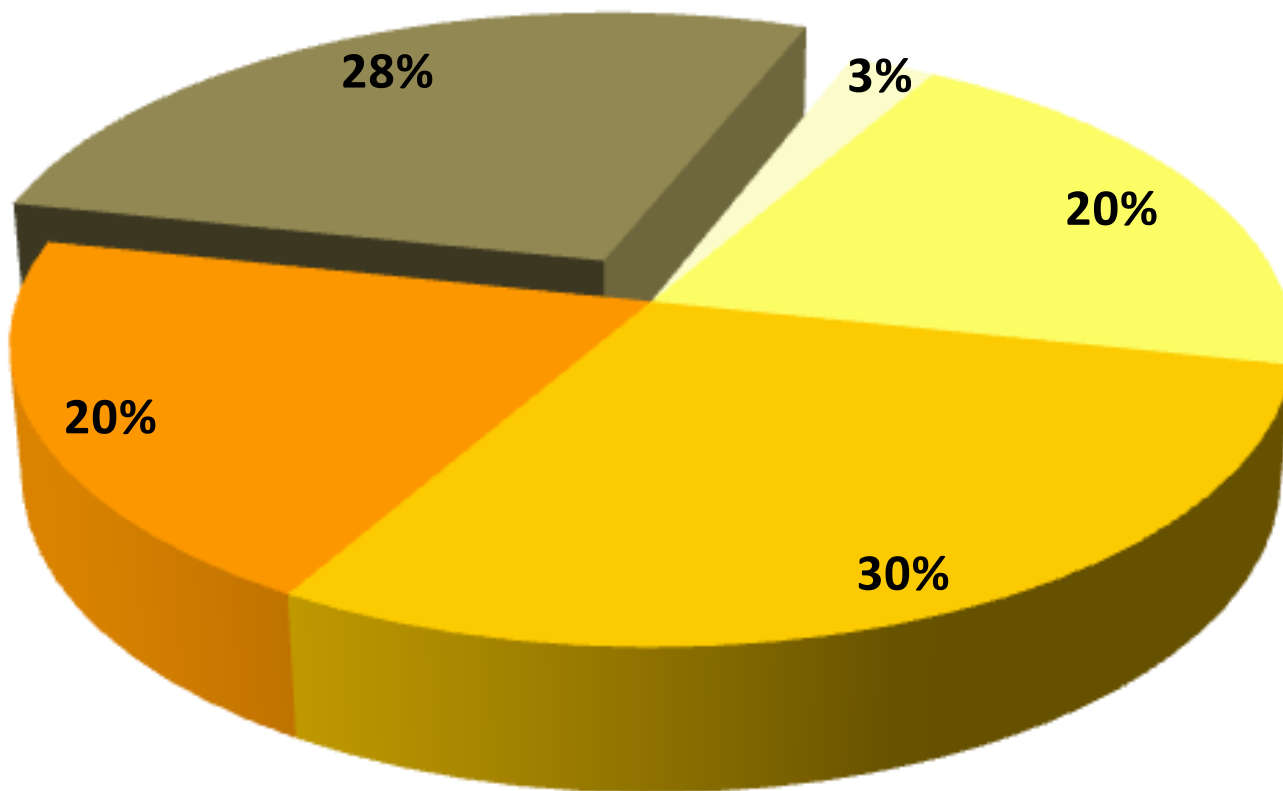
Don't know

Least Satisfied → Highly Satisfied

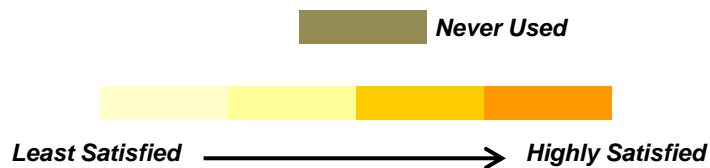
Satisfaction with...

MaltaPost's Website

Sample Size – 40 organisations



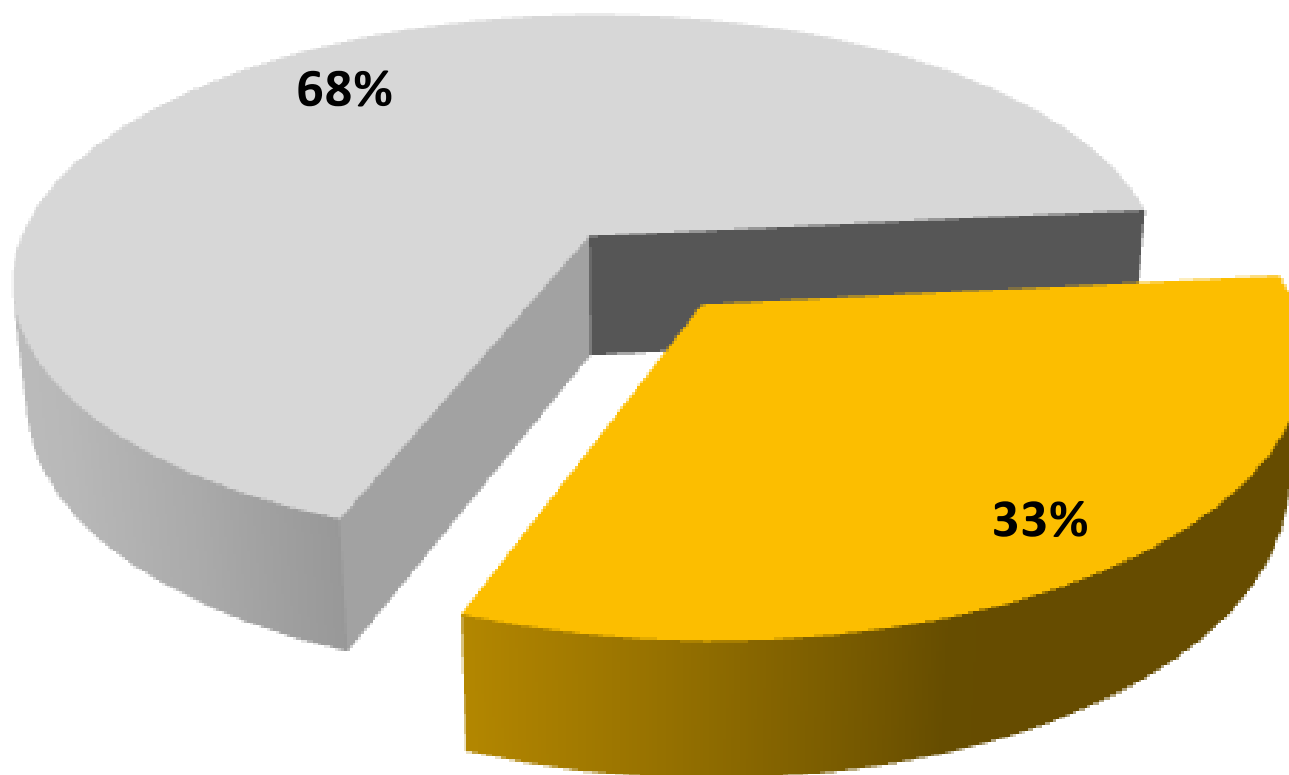
Only 28% (11 organisations) of large bulk mailers claim to have never used the MaltaPost's website - a significant improvement over households and Micro businesses.



Complaint Issues (1)

In the last 12 months, has your organisation made a formal complaint to MaltaPost about any aspect of postal services?

Sample Size – 40 organisations

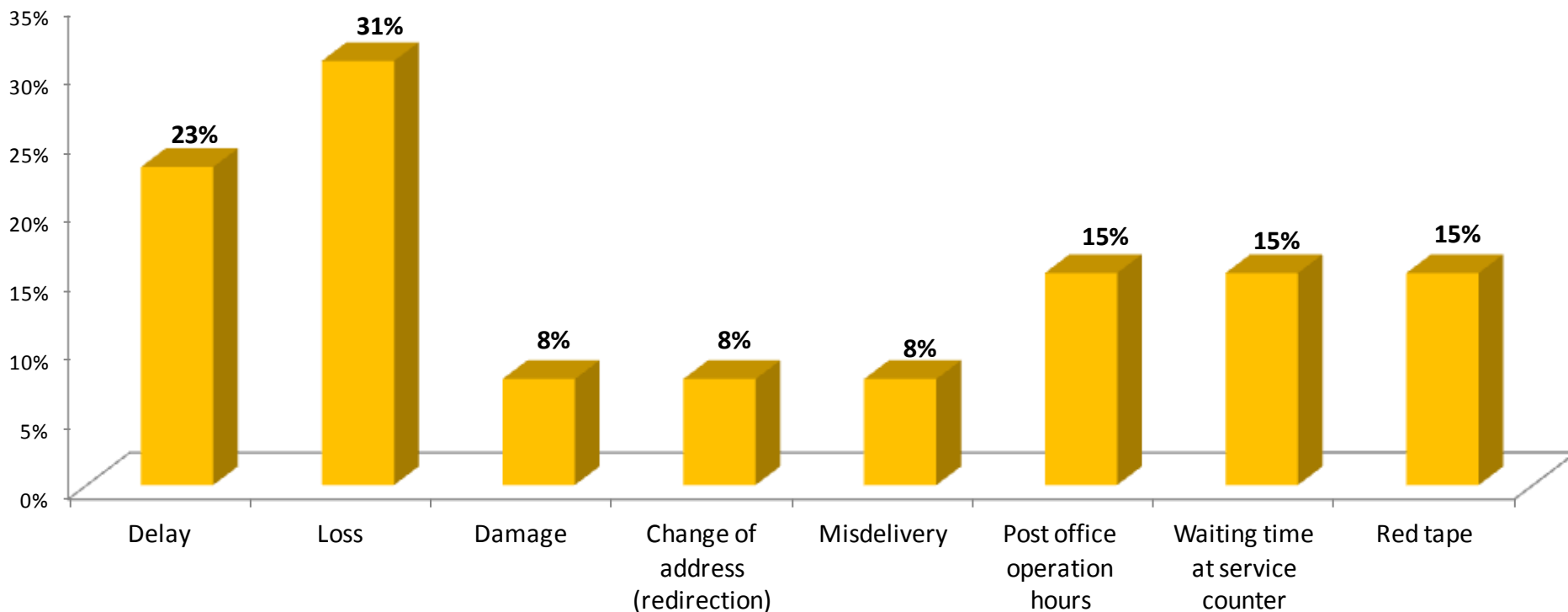


■ Yes ■ No

Complaint Issues (2)

What was the complaint about?

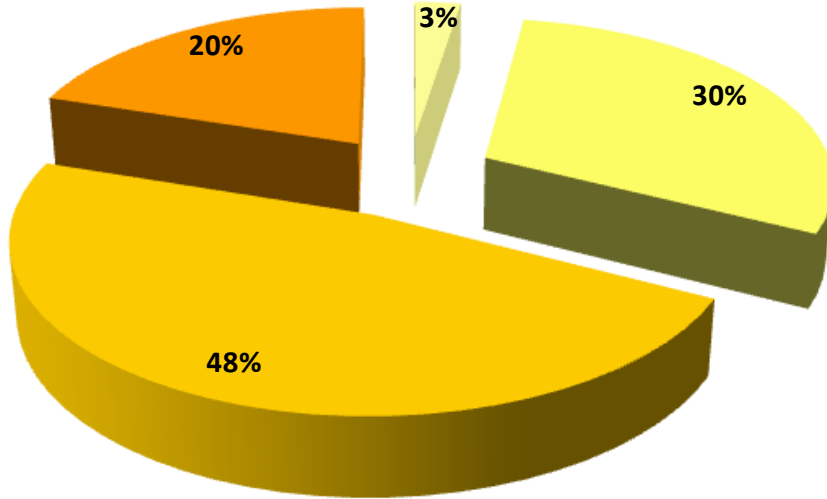
*Sample Size – 13 organisations
(each respondent could give more than one reason)*



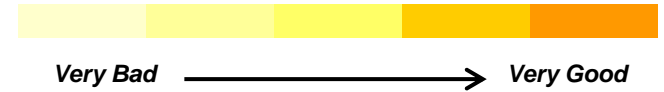
*92% of businesses who had made a formal complaint with MaltaPost **were not** satisfied with the way their complaint had been handled. Only one organisation had been compensated for its complaint.*

Overall Satisfaction with MaltaPost Services

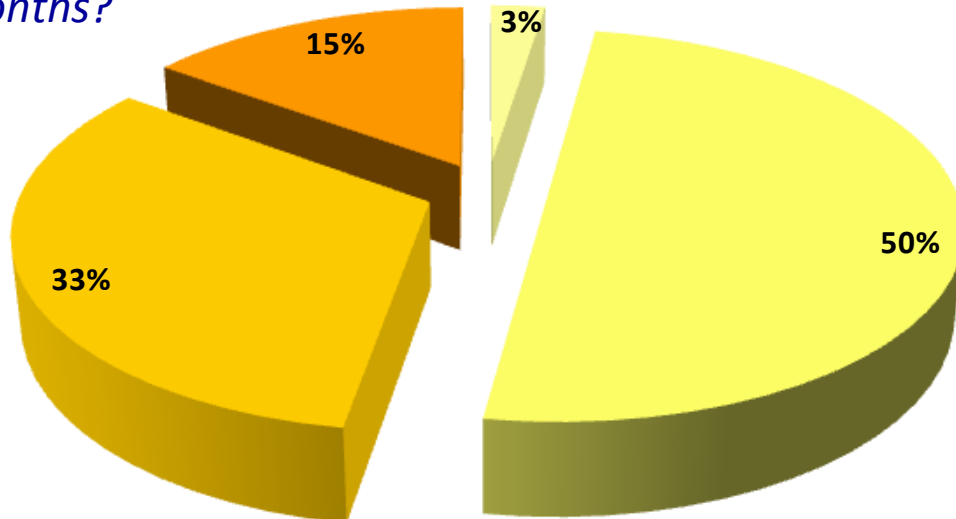
In your experience what do you think of the overall quality of postal services provided by MaltaPost?



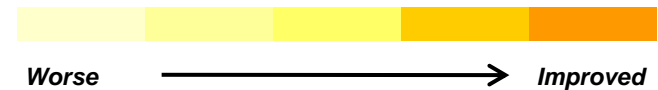
Sample Size – 40 organisations



In your experience how would you rate the overall service provided by MaltaPost over the last 12 months?



Sample Size – 40 organisations





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