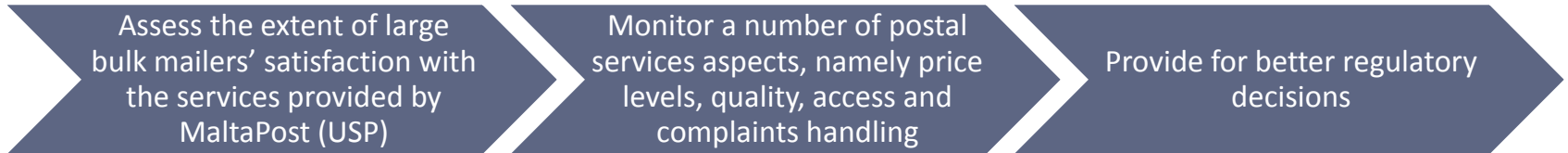


MCA Market Research

Postal Services – Large Bulk Mailers Survey Results

MCA | November 2014

1. Purpose & Methodology



Ernst & Young carried out the survey between July and August 2014 on behalf of the MCA

*A **total of 40 organisations** have been selected to participate in this face-to-face survey*

Each respondent (on behalf of the organisation) was the person responsible for the handling of mail & other postal articles in that organisation

To be eligible to participate in this survey the 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)*



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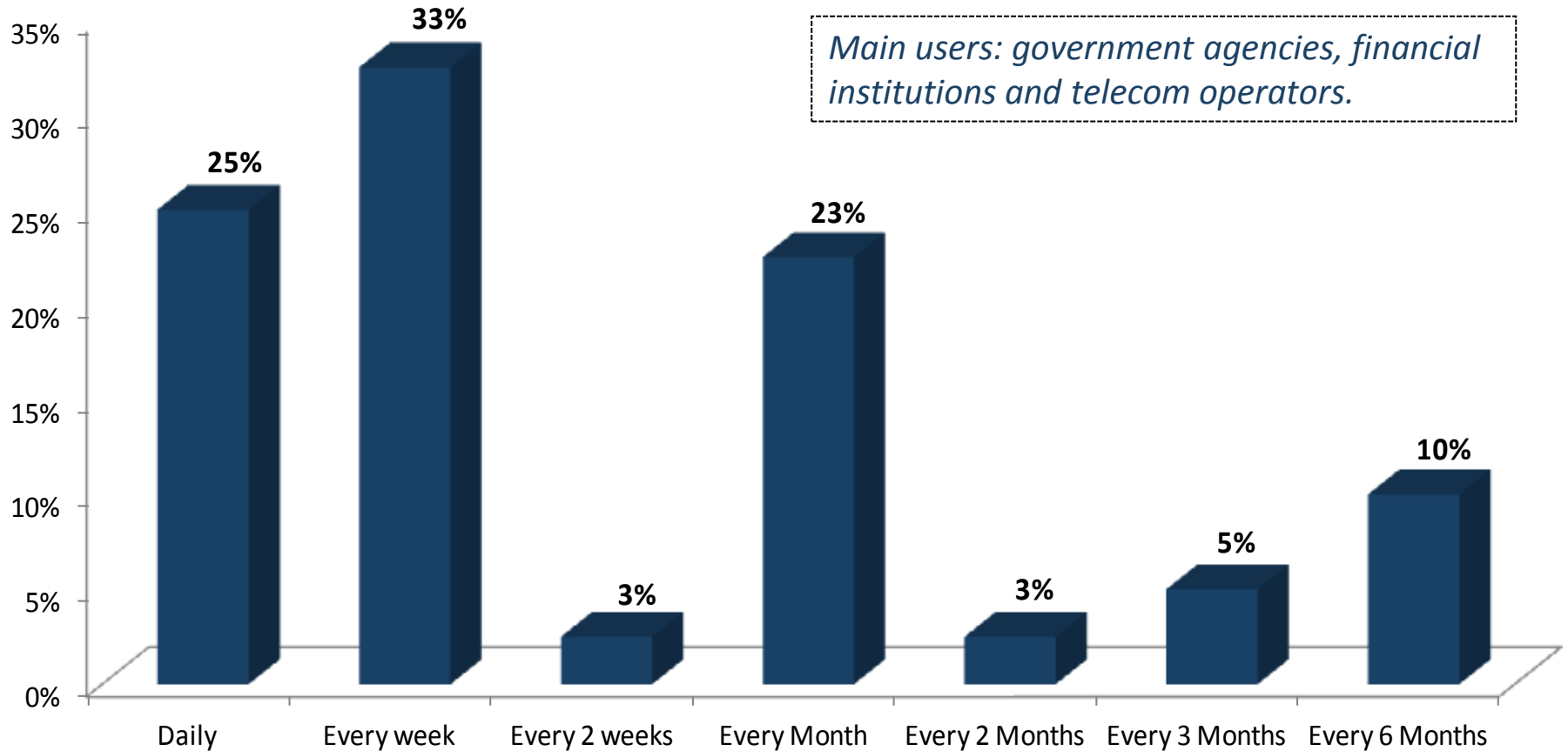
2. Review of Postal Services Provided to Large Bulk Mailers

Take-up of Bulk Mail Services (1)

How often do you use the bulk mail service?

Sample Size – 40 organisations

Main users: government agencies, financial institutions and telecom operators.

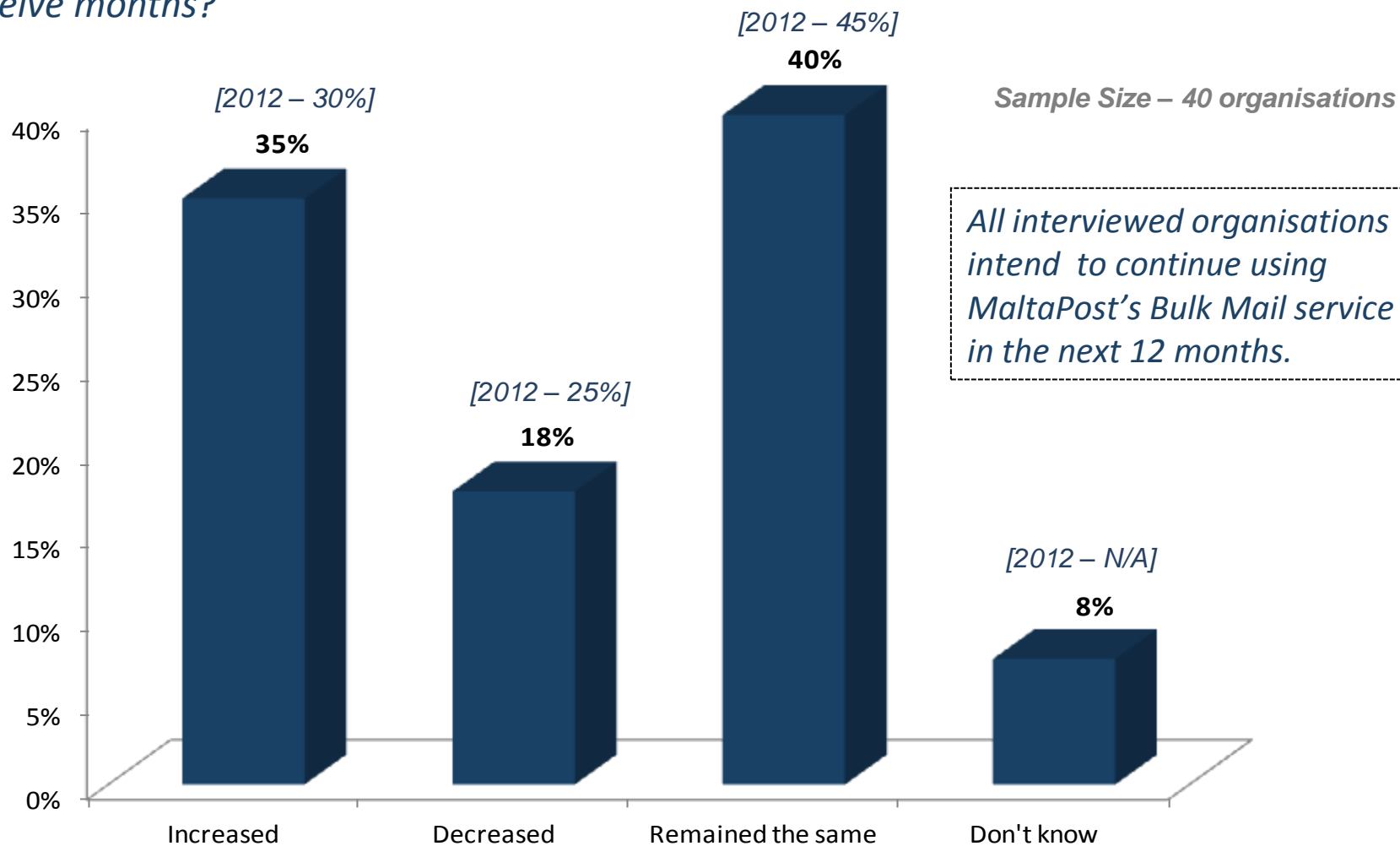




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Take-up of Bulk Mail Services (2)

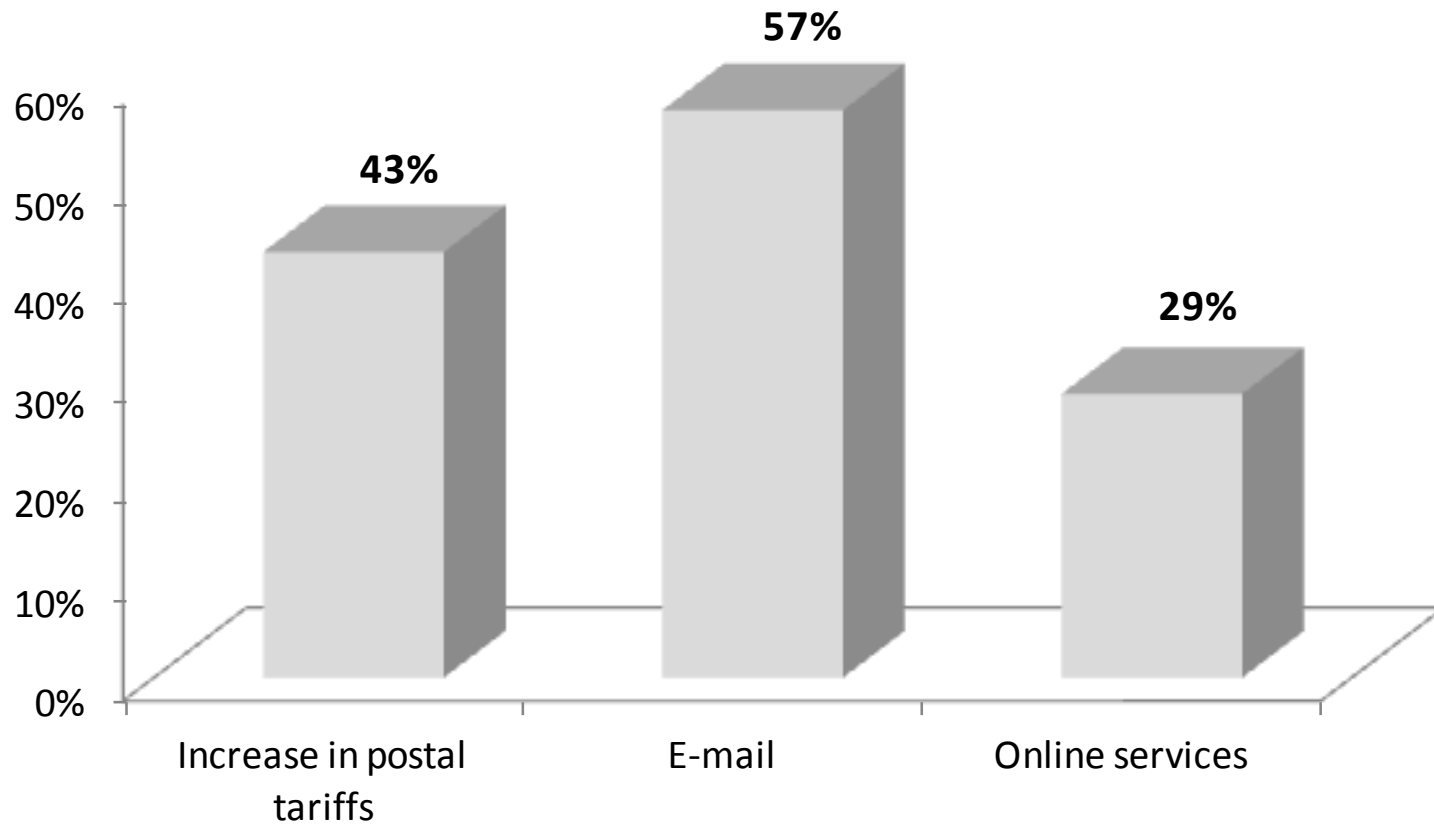
Did the number of addressed letters sent increase, decrease, or remain the same over the past twelve months?



Take-up of Bulk Mail Services (3)

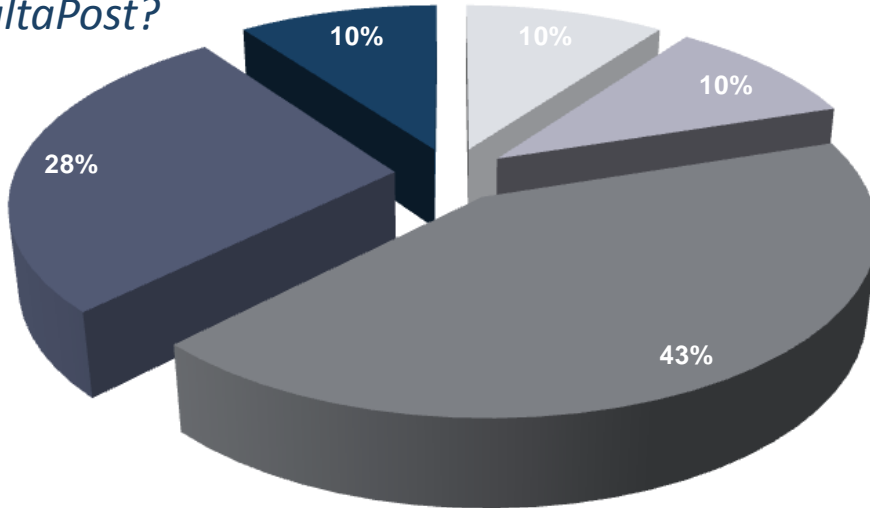
If there was a decrease in the number of addressed letters sent, what are the main reasons?

*Sample Size – 7 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?



Sample Size – 40 organisations

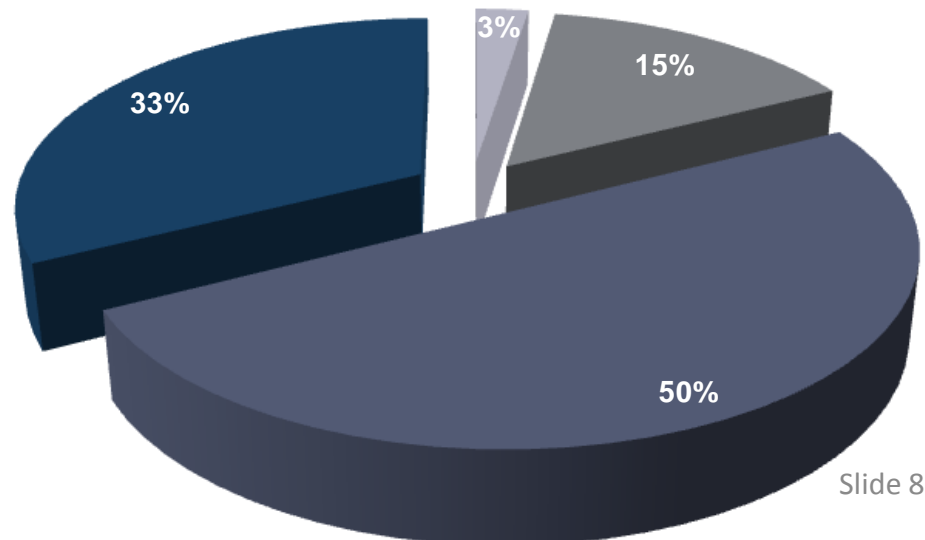
2012 Price Satisfaction Levels: 61%
2014 Price Satisfaction Levels: 38%



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

Sample Size – 40 organisations

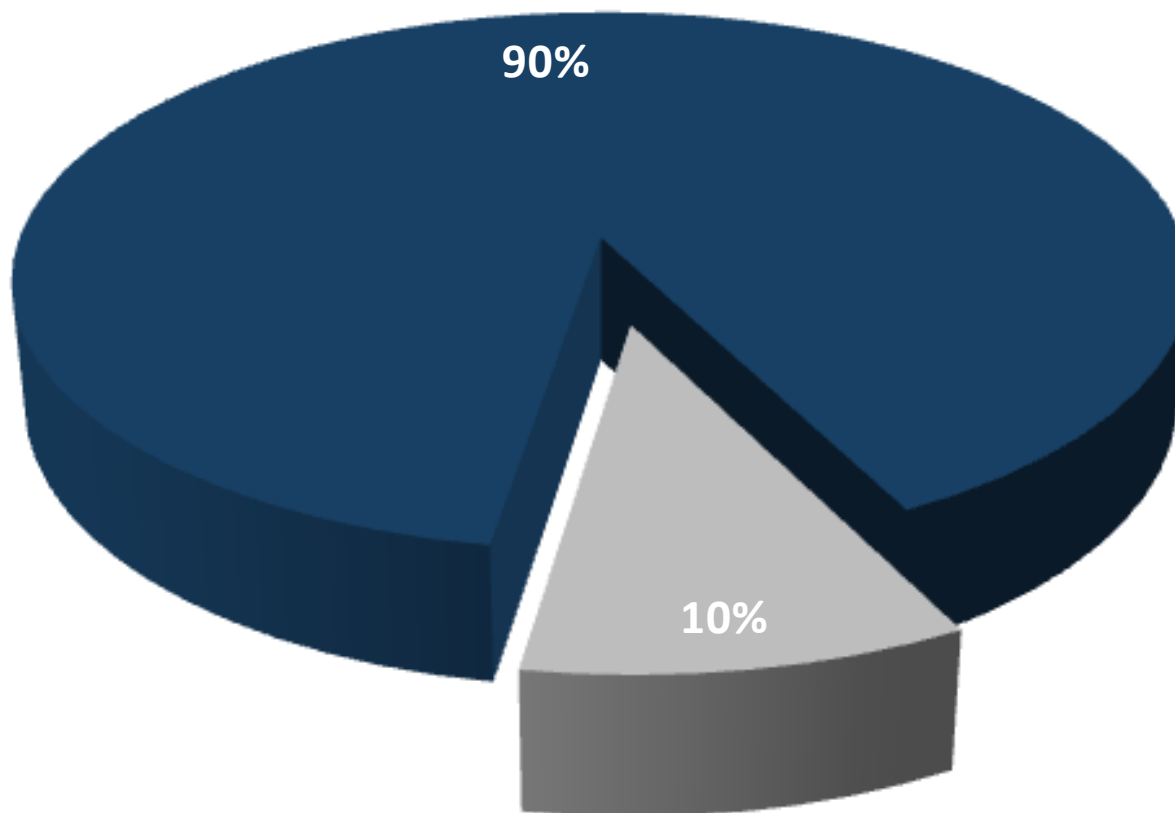
2012 Satisfaction Levels: 48%
2014 Satisfaction Levels: 83%



MaltaPost's Registered Mail Service (1)

Did the company send registered letters using MaltaPost over the past 12 months?

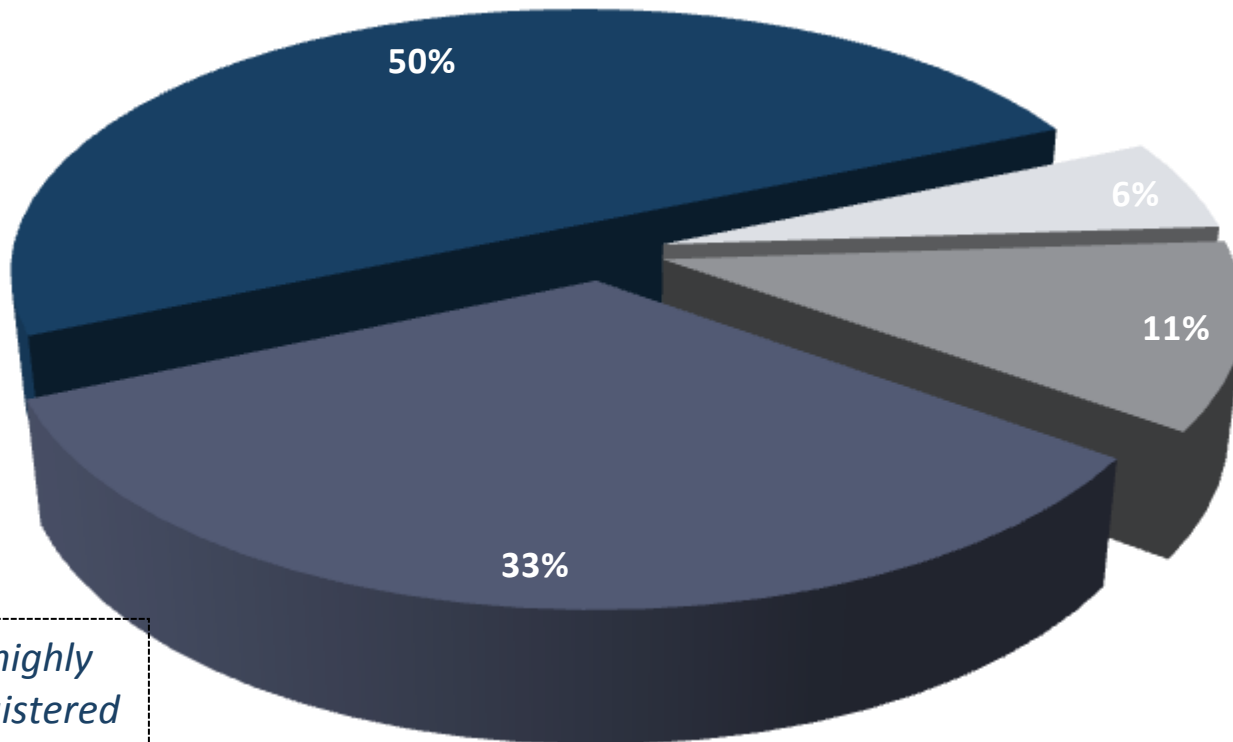
Sample Size – 40 organisations



■ Yes ■ No

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

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



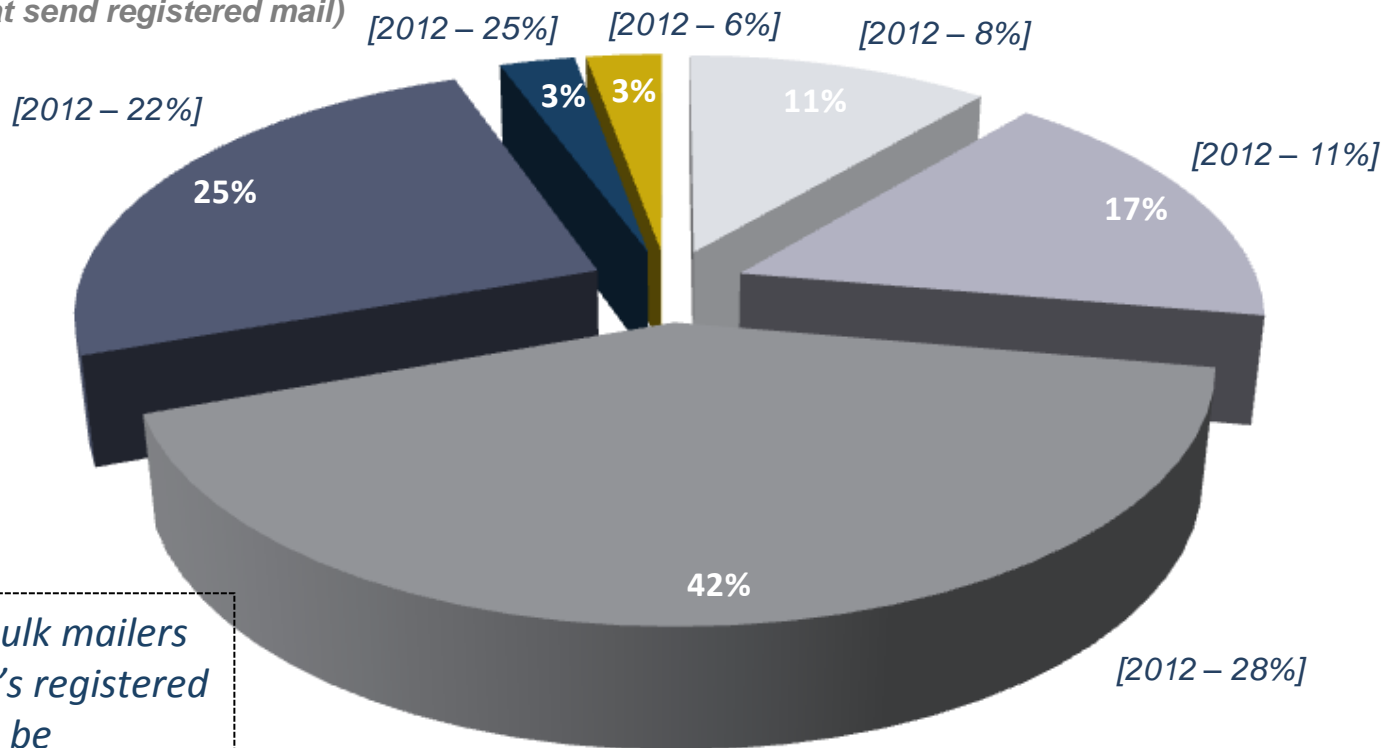
83% are satisfied or highly satisfied with the registered mail service provided by MaltaPost [64% in 2012].



MaltaPost's Registered Mail Service (3)

How expensive / reasonable do you find the prices of MaltaPost's registered mail services?

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



Only 28% of large bulk mailers perceive MaltaPost's registered letter mail tariffs to be reasonable [47% in 2012].

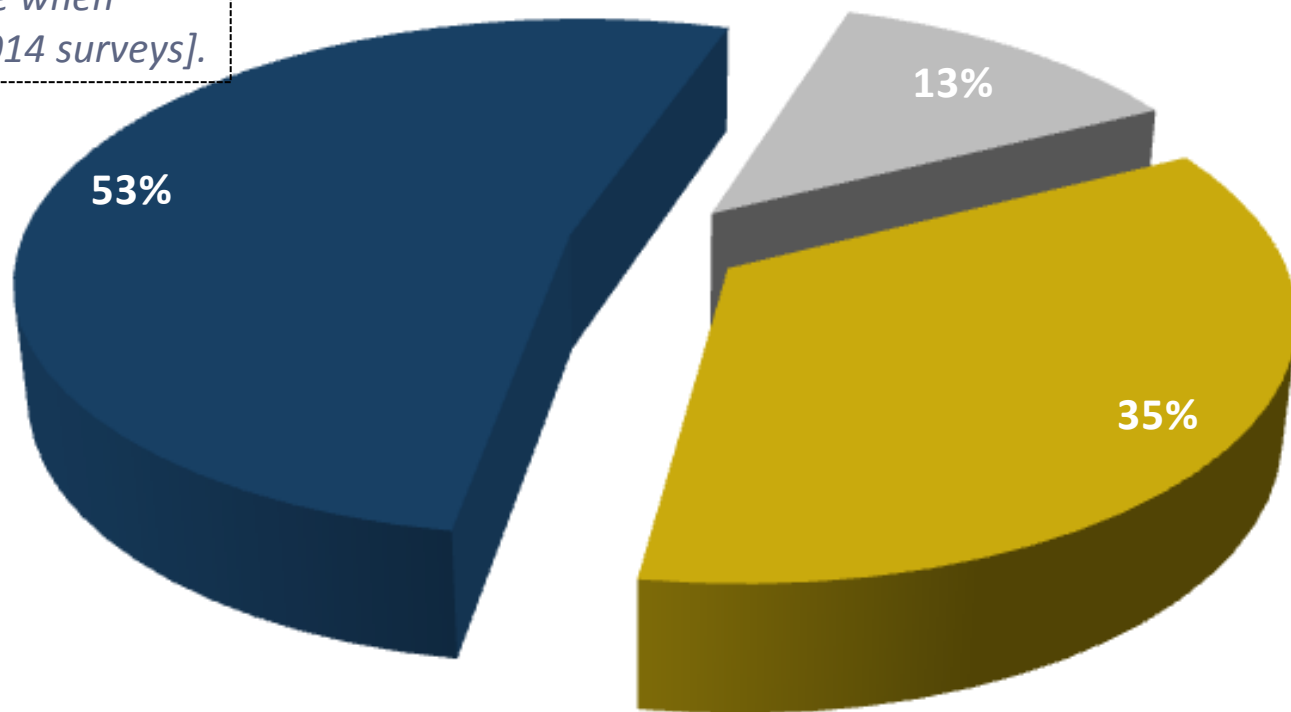
Don't know



Is the post-code included as part of the address when sending a letter?

71% of households & 76% of total businesses in Malta write down the post-code when sending a letter [2014 surveys].

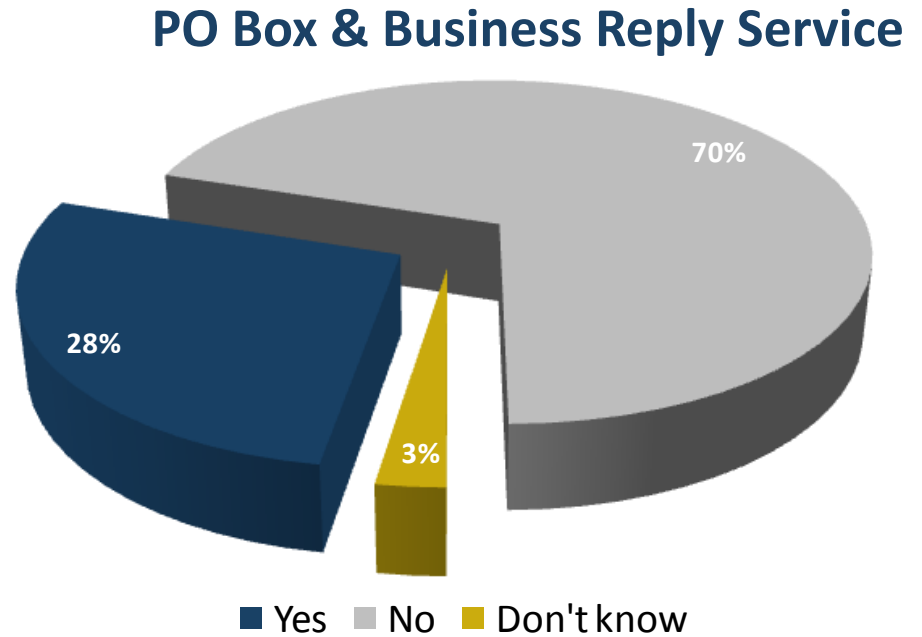
Sample Size – 40 organisations



■ Yes ■ No ■ Not always

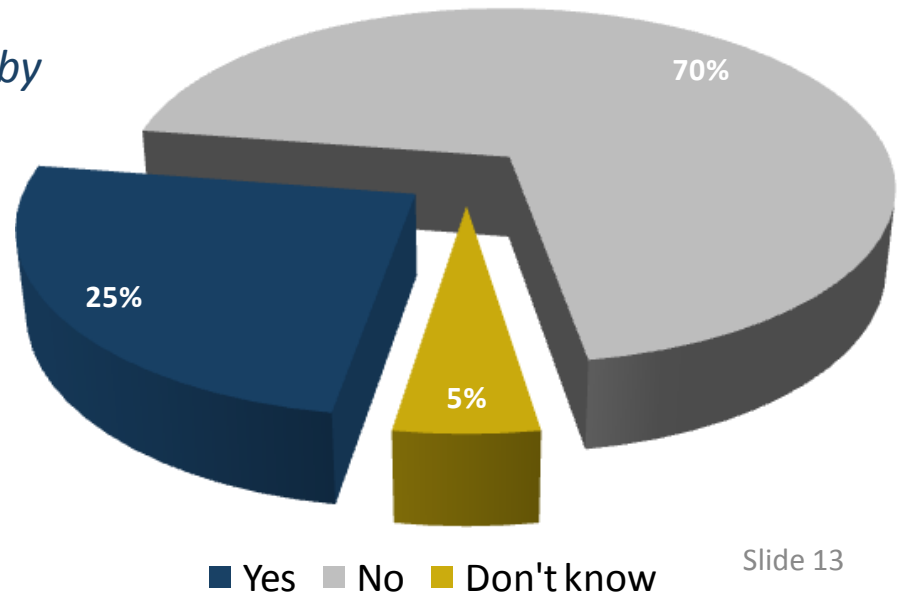
Do you use the PO box service provided by MaltaPost?

Sample Size – 40 organisations



Do you use the business reply service provided by MaltaPost?

Sample Size – 40 organisations



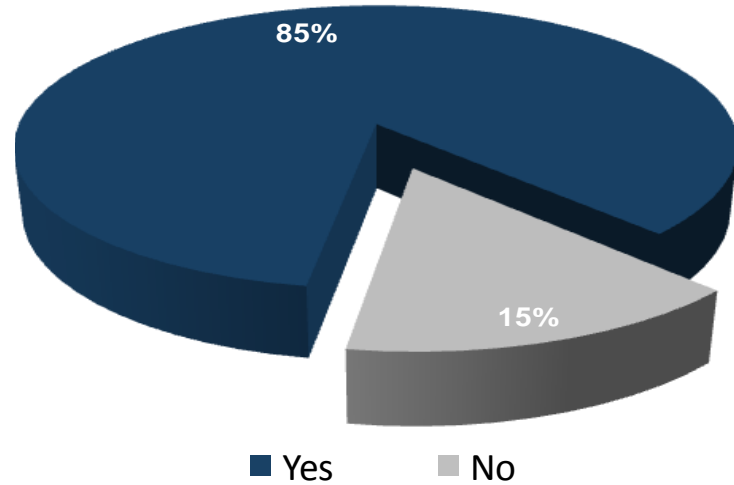
The significant majority (80%) of organisations using the business reply service consider it to be very useful.

3. Access to Post Office Services

Post Office Activity

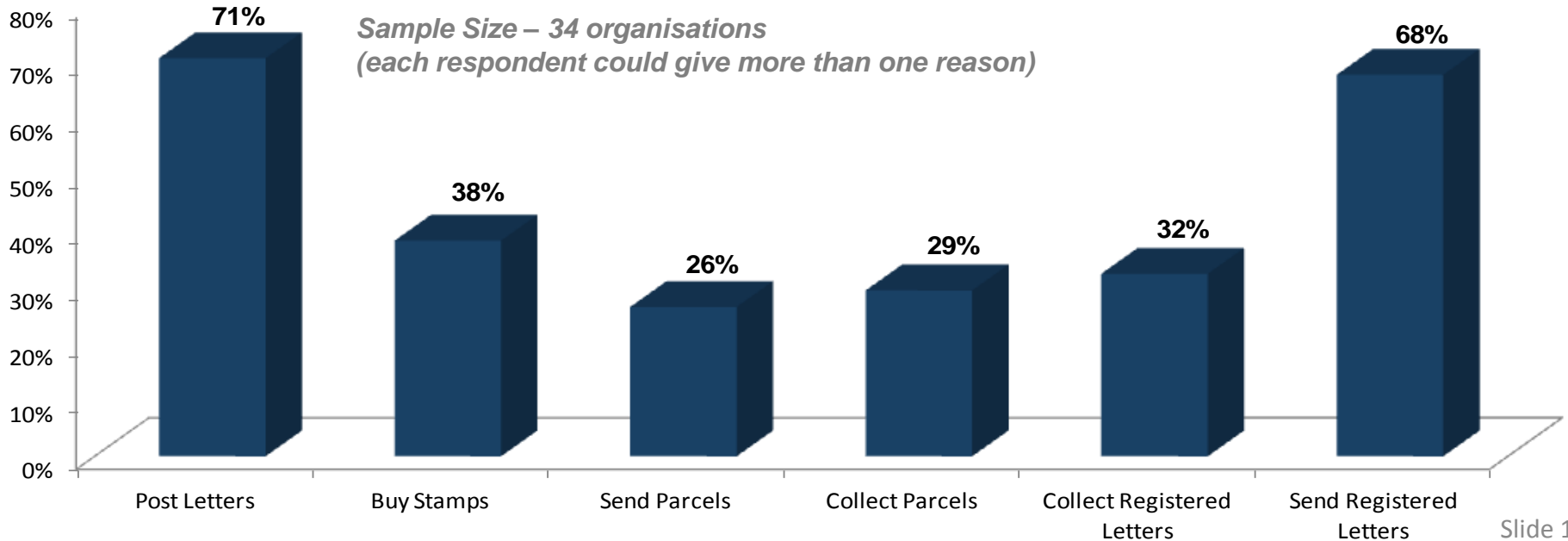
Have you been to the Post Office to use a service during the last twelve months?

Sample Size – 40 organisations

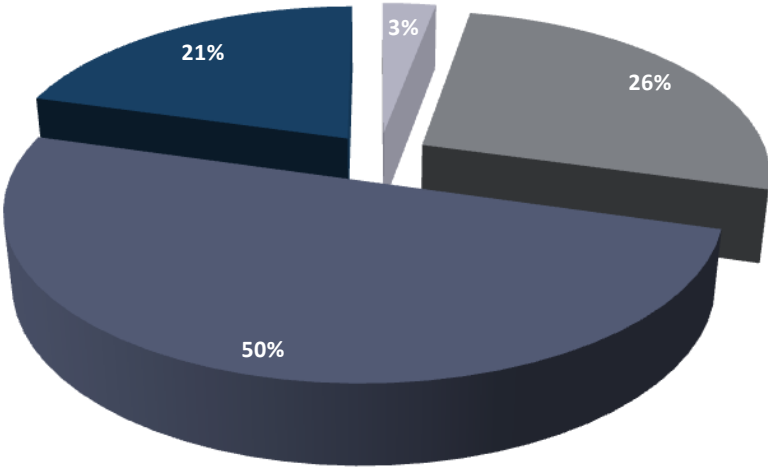


What services have you used from the Post Office?

*Sample Size – 34 organisations
(each respondent could give more than one reason)*



How satisfied are you with the services/facilities provided by the Post Office?



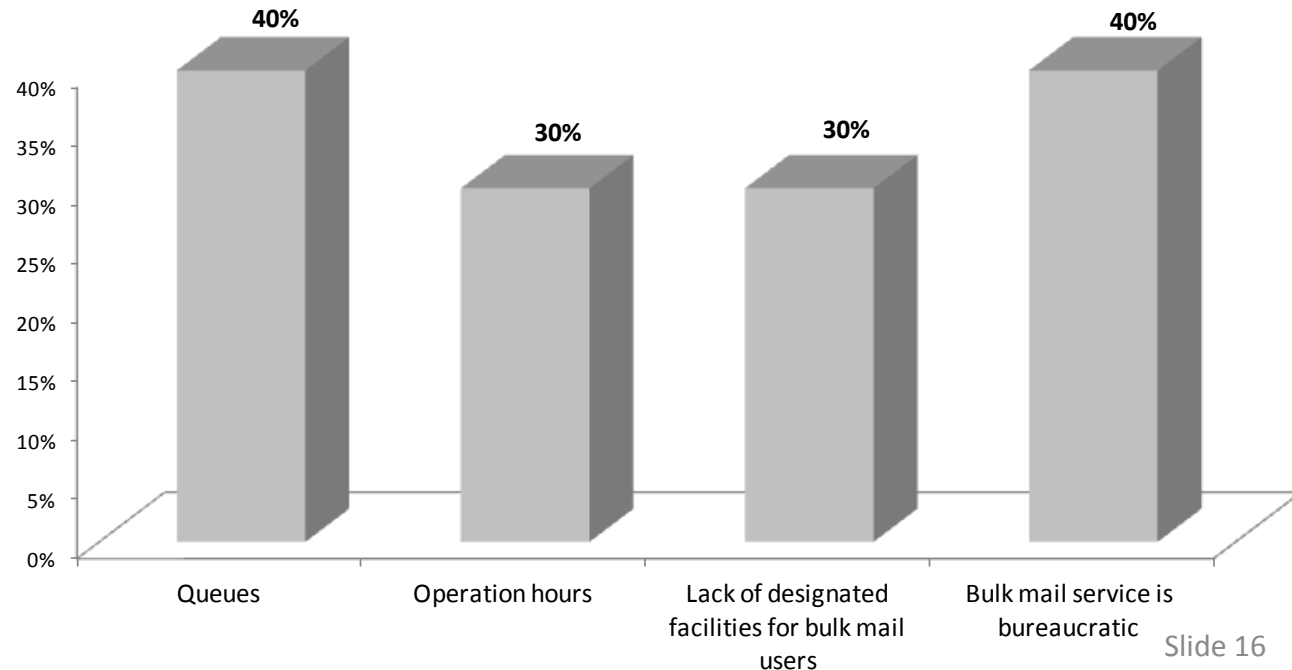
Sample Size – 40 organisations

2012 Satisfaction Levels: 63%
2014 Satisfaction Levels: 71%



Those that are not satisfied give their reasons...

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





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4. Satisfaction with MaltaPost's Services



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The availability of the post office

Sample Size – 40 organisations

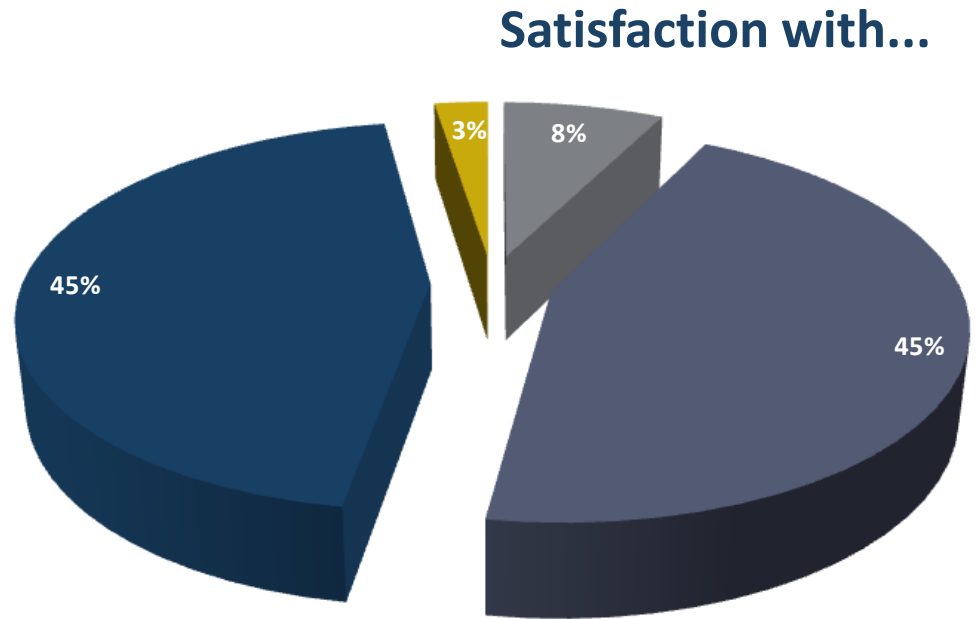
2012 Satisfaction Levels: N/A

2014 Satisfaction Levels: 90%

Don't know



Least Satisfied → Highly Satisfied



MaltaPost offices' opening and closing times

Sample Size – 40 organisations

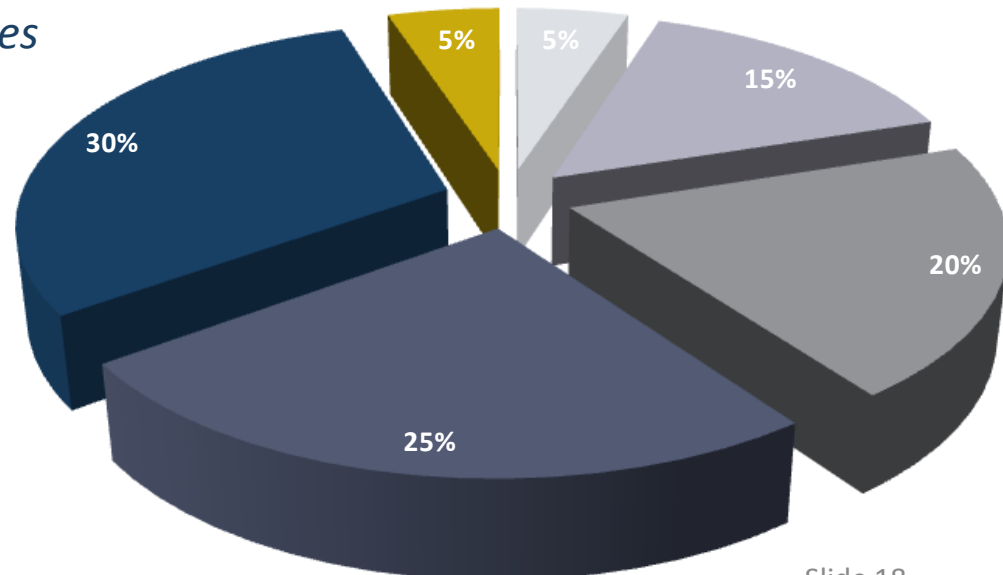
2012 Satisfaction Levels: 55%

2014 Satisfaction Levels: 55%

Don't know



Least Satisfied → Highly Satisfied



The accessibility to information about the services provided by MaltaPost

Sample Size – 40 organisations

2012 Satisfaction Levels: 48%

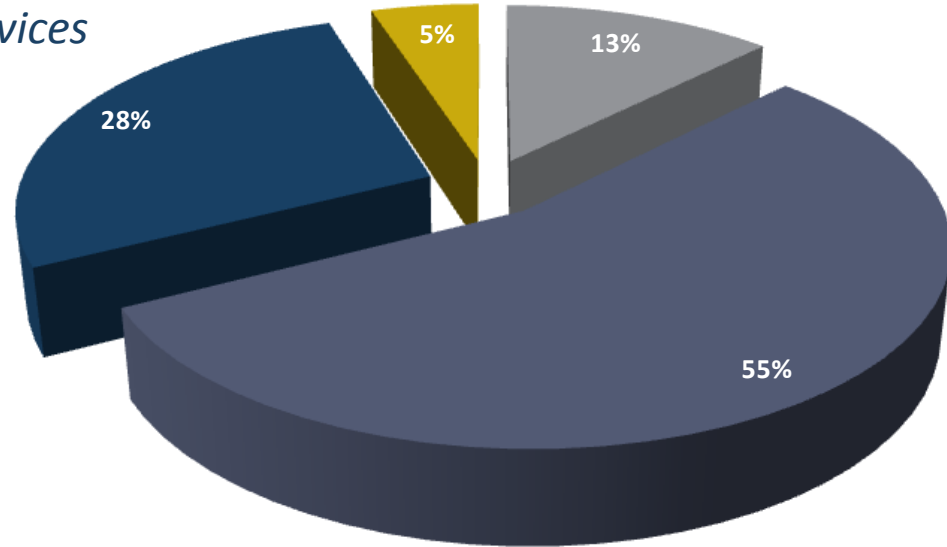
2014 Satisfaction Levels: 83%

 Don't know



Least Satisfied → Highly Satisfied

Satisfaction with...



MaltaPost's website

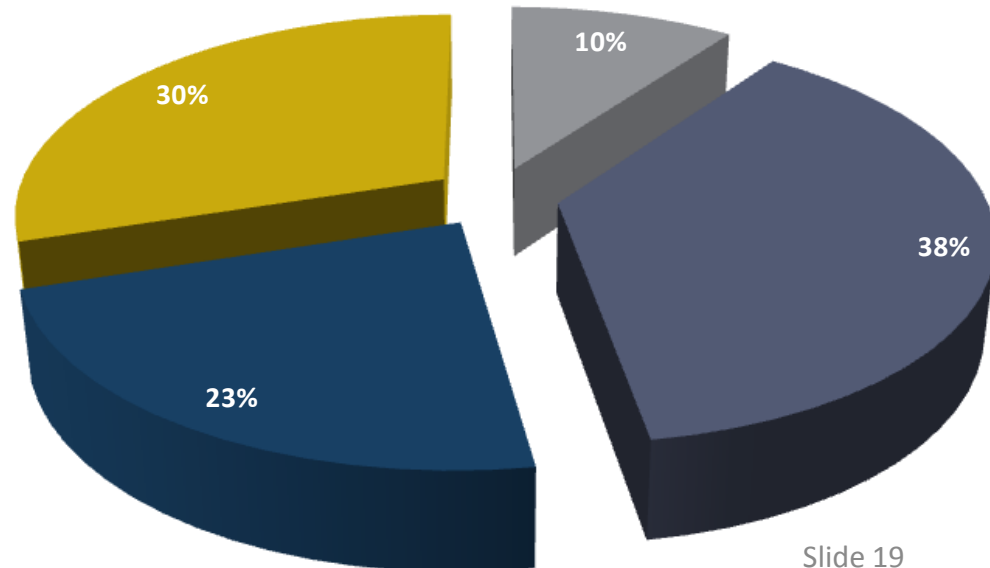
Sample Size – 40 organisations

Only 30% (12 organisations) of large bulk mailers claim to have never used MaltaPost's website [28% in 2012]

 Never Used



Least Satisfied → Highly Satisfied



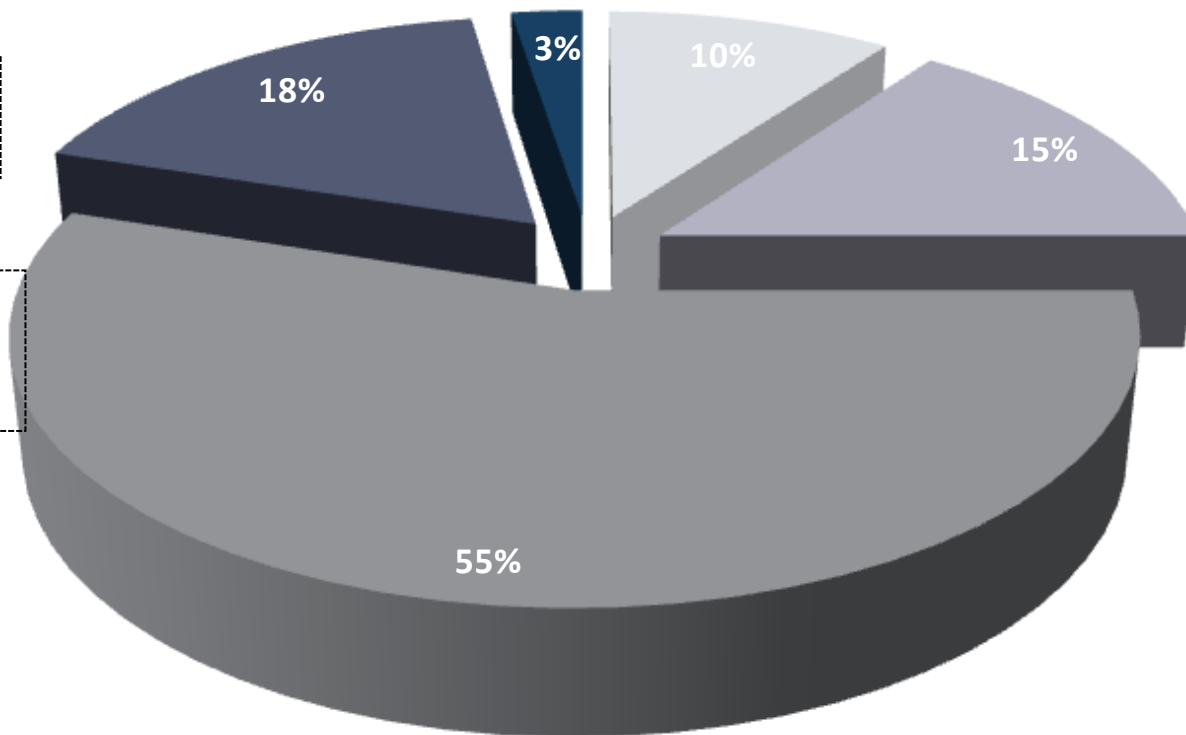
The prices of postal services (in general)

Sample Size – 40 organisations

2012 Price Satisfaction Levels: **N/A**

2014 Price Satisfaction Levels: **21%**

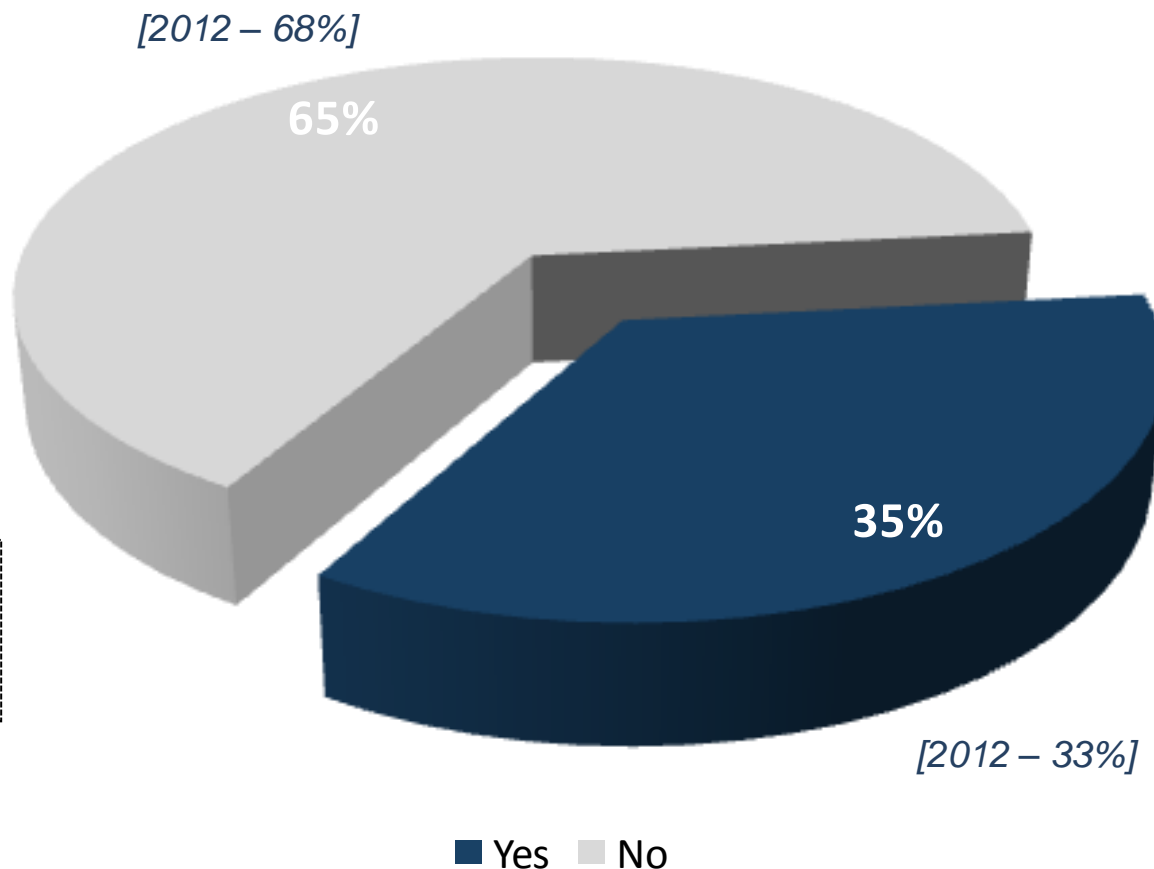
The majority (55%) of large bulk mailers are neither satisfied nor dissatisfied with the general price levels of postal services.



Least Satisfied → Highly Satisfied

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

Sample Size – 40 organisations



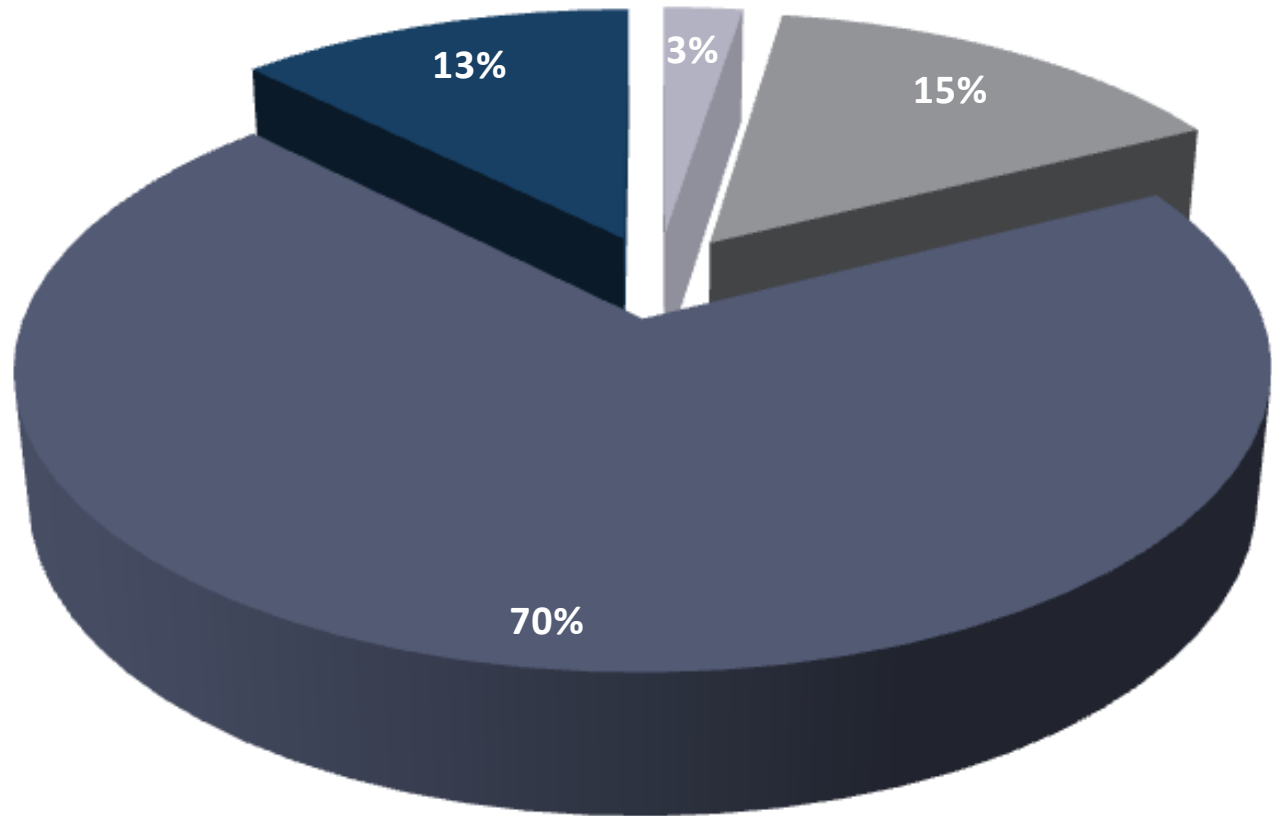
64% of organisations which made a formal complaint with MaltaPost were satisfied with the way their complaint had been handled. This reflects a significant improvement over 2012 where only 8% were satisfied .

No organisation from those interviewed had been compensated for their 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



83% of organisations perceive the overall quality of postal services provided by MaltaPost to be good or very good [68% in 2012].



5. Main Highlights

- The main bulk mail service users are government agencies, financial institutions and telecom operators
- Large bulk mail users, while few in numbers, are an important client to MaltaPost as they generate a significant number of addressed letter mail volumes
- Compared to 2012 there has been an improvement in the perception of large bulk mail users with regards to the overall quality of postal services, including complaint handling
- In terms of pricing, the majority (55%) of large bulk mailers are neither satisfied nor dissatisfied with the general price levels of postal services
- Only 38% of interviewed organisations perceive the bulk mail service to be reasonably priced, down from 61% in 2012
- 18% of large bulk mail users claim to have decreased the number of addressed letters sent over the past 12 months, 43% of which due to the increase in postal tariffs
- All interviewed organisations intend to continue using MaltaPost's Bulk Mail service in the next 12 months

- Fewer large bulk mail users write down the post code (53%) when compared to households (71%) and the general business community (76%)
- Few large bulk mailers use the PO Box and Business Reply service. The majority of those that use it find it very useful



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Thank you

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