



# MCA Market Research

## *Postal Services – Business Survey Results*

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November 2019



# **Section 1: Purpose & Methodology**



## Purpose & Methodology

*EMCS Ltd carried out the survey between January and February 2019 on behalf of the MCA*

### Fieldwork

- Interviews were carried out by telephone lasting around 20 minutes
- The survey respondents were chosen randomly from the Yellow Pages Directory
- Interviews on behalf of the organisation were carried out with those responsible for mail items within the business

### Sample

- Sample size was representatively distributed across 7 predefined industries of the business sector in Malta (Source: NACE Codes)
- The interviews were carried out with businesses that have been randomly selected on the basis of this distribution
- To capture more qualitative information on medium to large sized businesses, the 10– 49 and 50+ employee categories were boosted

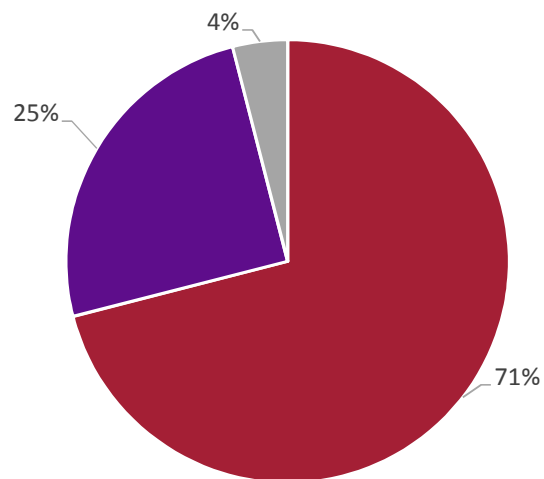
### Responses

- 390 net respondents ( Main Sample – Microenterprises plus)
- 156 net respondents (Boosted Sample – SMEs and Large enterprises)
- Any refusals / incomplete surveys were re-allocated to achieve net samples of at least 390 and 156 interviewees
- Margin of error +/- 4.21% at 95% confidence interval



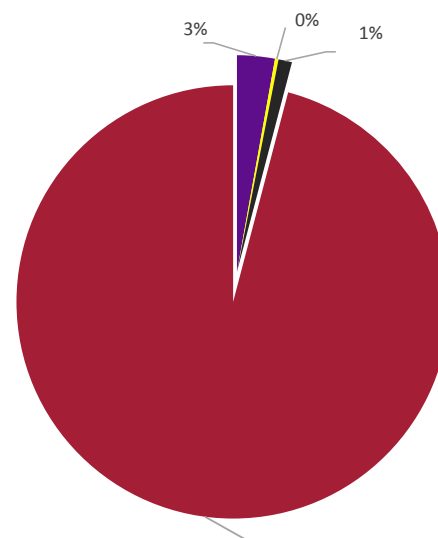
## Responses Distribution

How many people does your company employ?  
 Boosted Sample ( Small, Medium & Large Enterprises ) - 156



- 10-49 impjegati / 10-49 employees (small enterprise)
- 50 - 249 impjegati / 50 - 249 employees (medium-sized enterprise)
- 250+ impjegati / 250+ employees (large enterprise)

How many people does your company employ ?  
 Main Sample ( Micros plus ) - 390



- 10-49 impjegati / 10-49 employees (small enterprise)
- 250+ impjegati / 250+ employees (large enterprise)
- 50 - 249 impjegati / 50 - 249 employees (medium-sized enterprise)
- sa 9 impjegati / up to 9 employees (micro enterprise)



## **Section 2:**

**Main Sample : (mainly Microenterprises)**

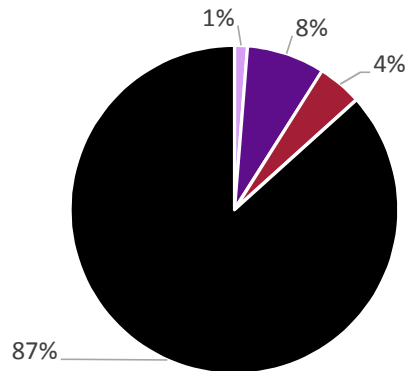


## **Section 2.1: Product sales over the internet**



Sample size - 390

Does your company sell products/services over the internet?

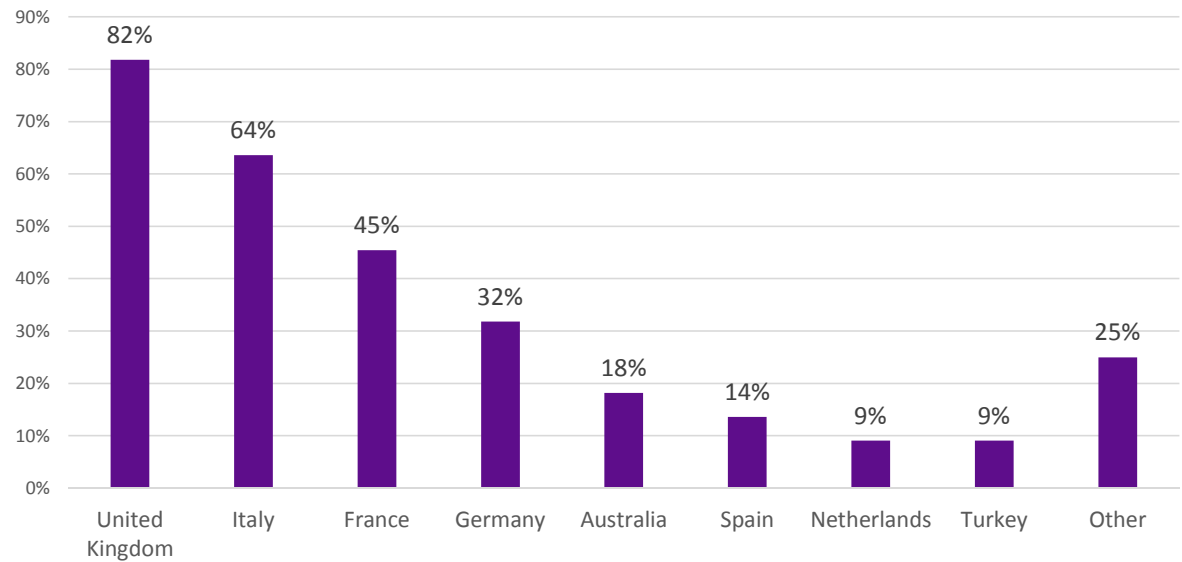


- Iva - barra minn Malta biss / Yes - abroad only
- Iva - f' Malta biss / Yes - Malta only
- Iva - kemm f' Malta kif ukoll barra minn Malta / Yes - both Malta & abroad
- Le / No

## Sales over the internet - Businesses

Sample size - 22

Mention three main destinations abroad where the organisation sells its products or services



12% of businesses sell products over the internet, with 4% indicating to sell both locally and overseas.



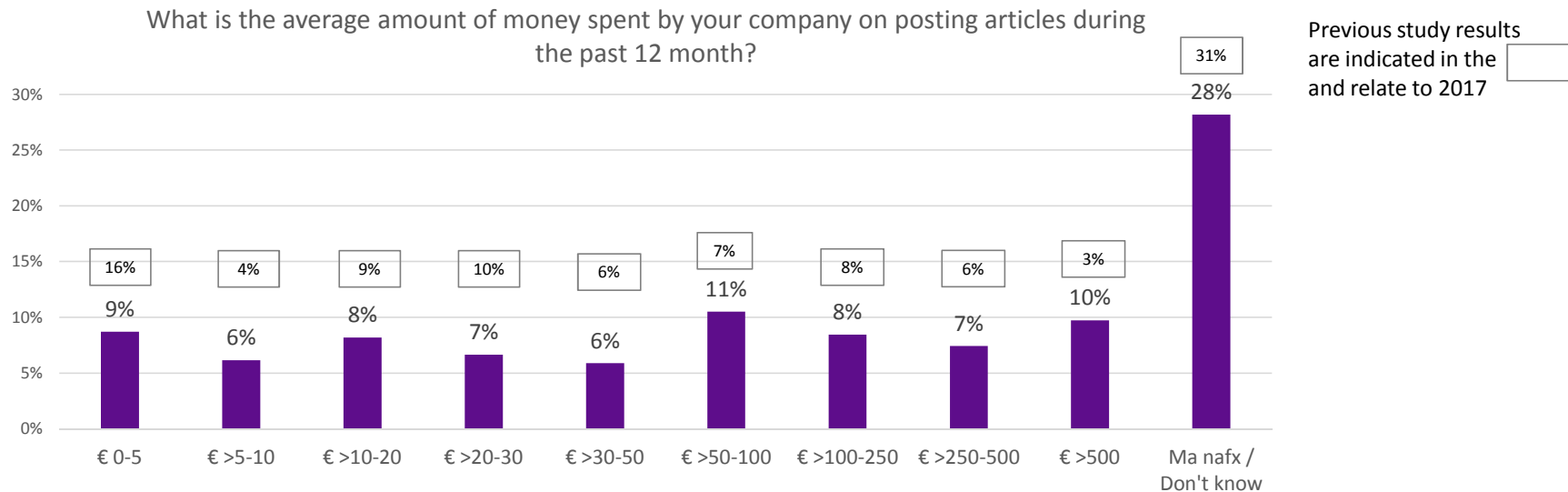
## **Section 2.2: Addressed Letter Mail**





## Expenditure on Addressed Letters – Businesses (1)

Sample size - 390



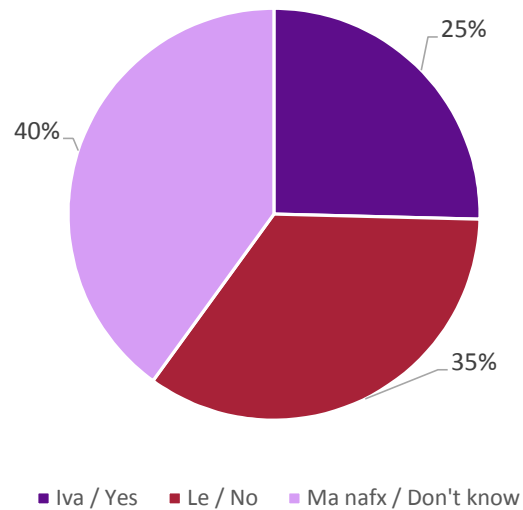
9% of businesses claim to spend less than €5 a year on addressed letters. In 2017 this stood at 16%. The amount of businesses that spend less than €50 has decreased since the last study (now 36%, in 2017 this stood at 45%.)



## Expenditure on Addressed Letters – Businesses (2)

*Sample size - 390*

Do you consider that this financial outlay on posting articles (during the past 12 months) as being significant for your company?

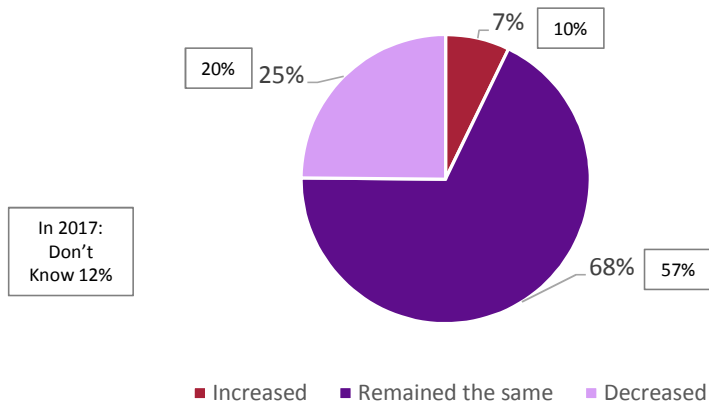


40% of businesses were not able to indicate whether the financial outlay on postal articles was significant or not for their entity.  
25% of businesses did however consider the financial outlay on posting articles to be significant.



Sample size is 390

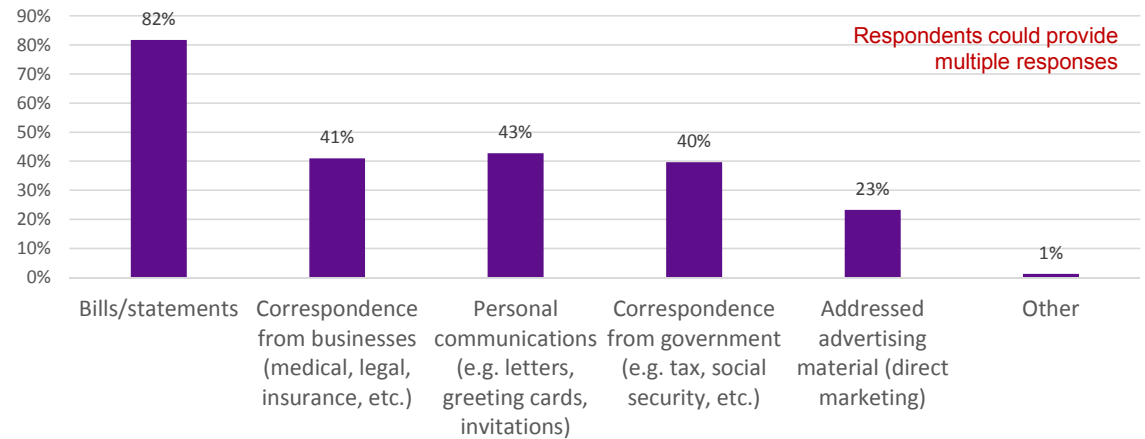
Can you tell me if the number of addressed letters (not unaddressed/junk mail) RECEIVED by the organisation each week has increased, decreased or remained the same over the past twelve months?



## Activity of Postal Services – Businesses (1)

Sample size is 390

What type of addressed letters did your organisation RECEIVE over the past 12 months- (Tick all that apply, beginning with the category of letter mail which is most often received)



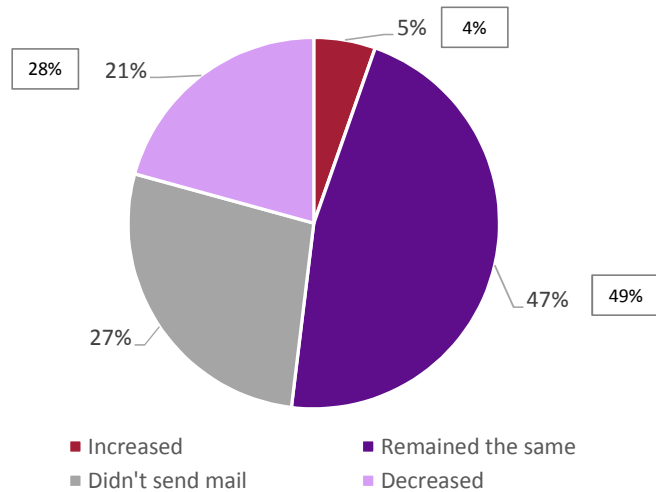
The majority of businesses claim to have received the same volume of addressed letters over the past 12 months. 82% of respondents cited bills/ statements as the most common type of addressed letters received.



## Activity of Postal Services – Businesses (2)

Sample size is 390

Did the number of addressed letters (not unaddressed/junk mail) SENT by your organisation increase, decrease or remain the same over the past twelve months?

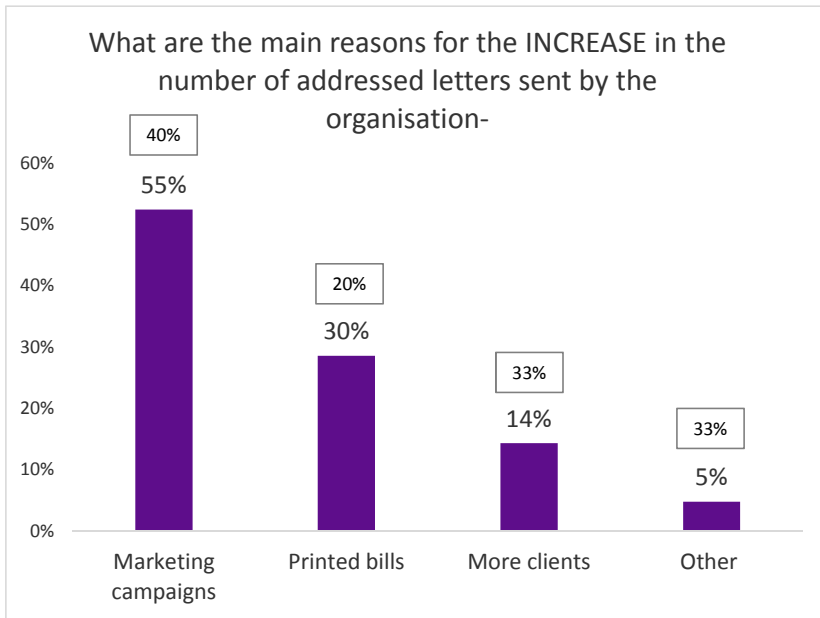


47% of respondents indicated to have sent the same volume of addressed letters over the past 12 months. A total of 27% indicated not to send addressed letters.



Sample size – 21

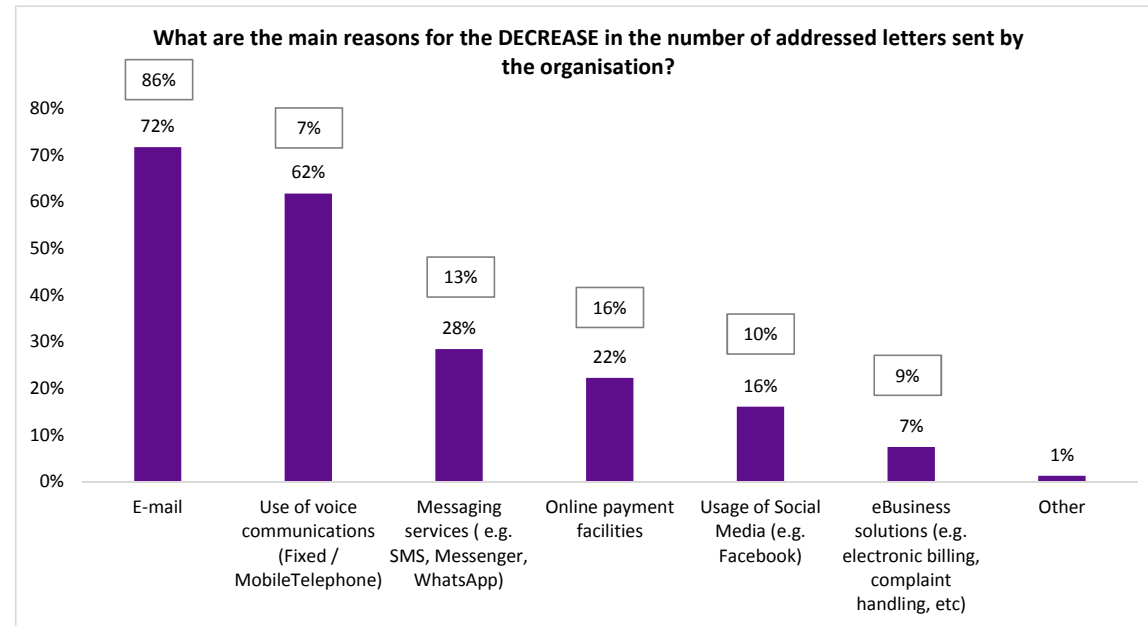
Respondents could provide multiple responses



## Activity of Postal Services – Businesses (3)

Sample size – 81

Respondents could provide multiple responses



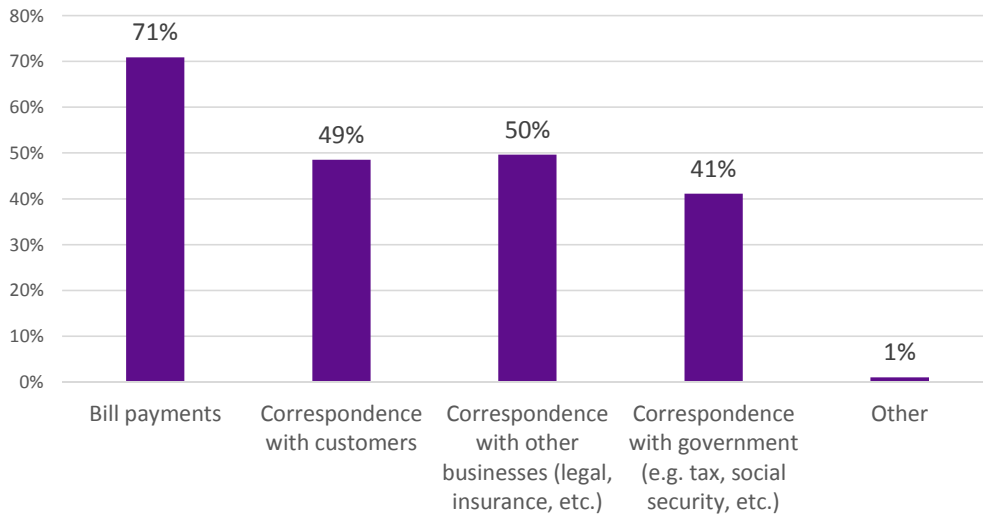


## Activity of Postal Services – Businesses (4)

Sample size – 282

Respondents could provide multiple responses

What type of addressed letters did your organisation send over the past twelve months? (Tick all that apply, beginning with the type most frequently sent)

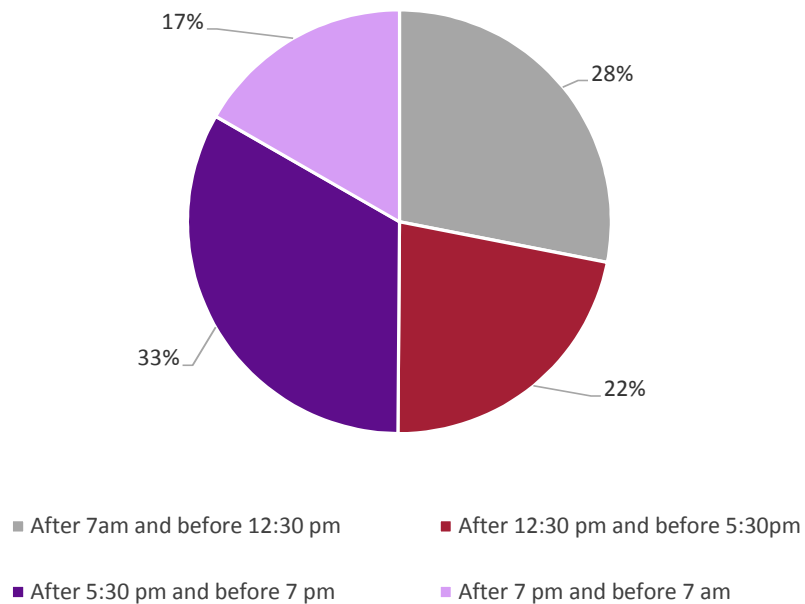


The majority of businesses (71%) indicated to have sent bill payments. Correspondence was also mentioned by half the businesses (both with customers and other businesses).

## Activity of Postal Services – Businesses (5)

Sample size – 283

What is the most convenient time of the day (Monday to Saturday) for your organisation to post a letter in a Maltapost post-box? (Tick one)



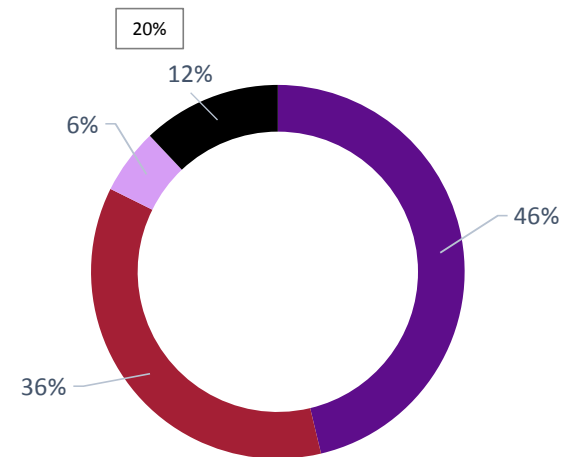
33% of businesses indicated that the most convenient time for them to post a letter was after 5.30pm and before 7pm. After 7am and before 12.30pm ranked second with 28% responses.



## Awareness on Post-code – Businesses (1)

Sample Size – 283

Does the organisation write the post-code when sending a letter?



■ Yes, always ■ Yes, sometimes ■ Yes, rarely ■ No

88% of businesses write down the post-code when sending a postal article (though not necessarily always). In 2017 80% indicated to do so.



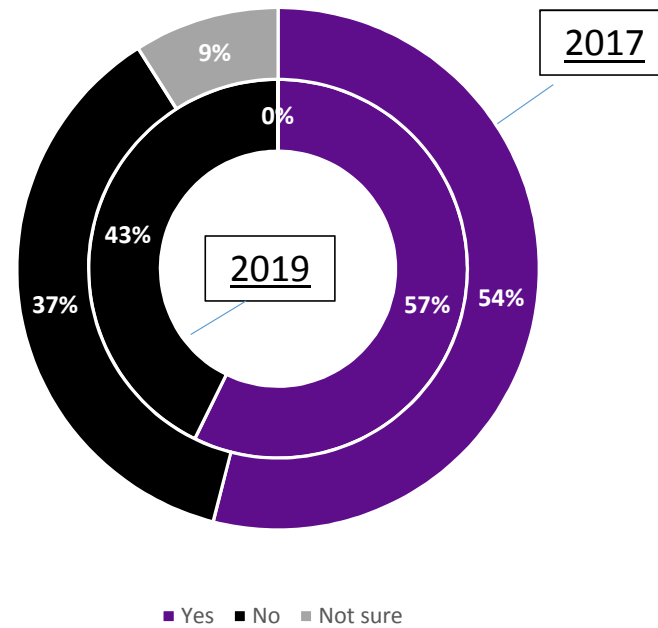


## Awareness on Post-code – Businesses (2)

Sample size - 283

Is your organisation aware that there is a post-code finder on MaltaPost's website?

57% of businesses are aware of the post-code finder available on the MaltaPost's website.



## Price Analysis: Substitution to Non-Postal Alternatives - Businesses

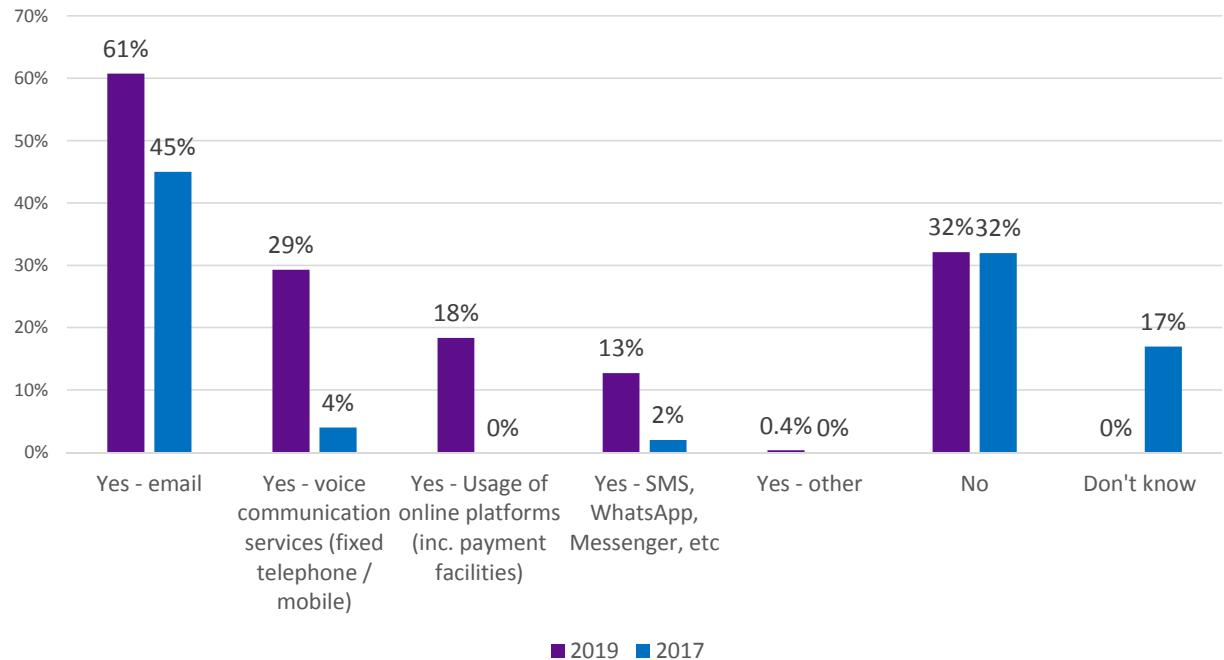
Sample Size – 283

Respondents could provide multiple responses

If the price of a 50g addressed letter were to increase by 5-10% (e.g. from 26c to 29c) would your organisation consider switching to non-postal alternatives?

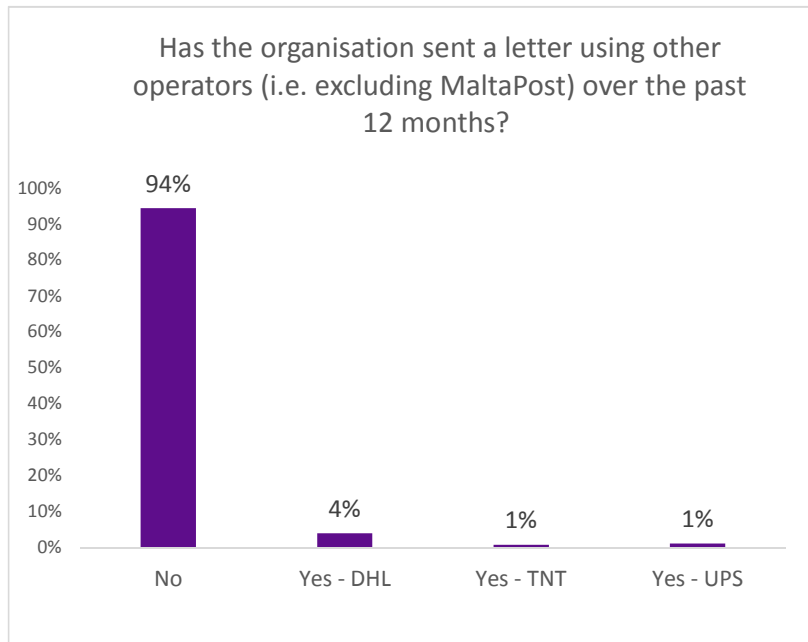
68 % of businesses would use non-postal alternatives if the price of a 50g letter were to increase.

While the percentage of non postal alternatives increased in 2019 when compared with 2017, the 'No' respondents remained unaltered (32%).

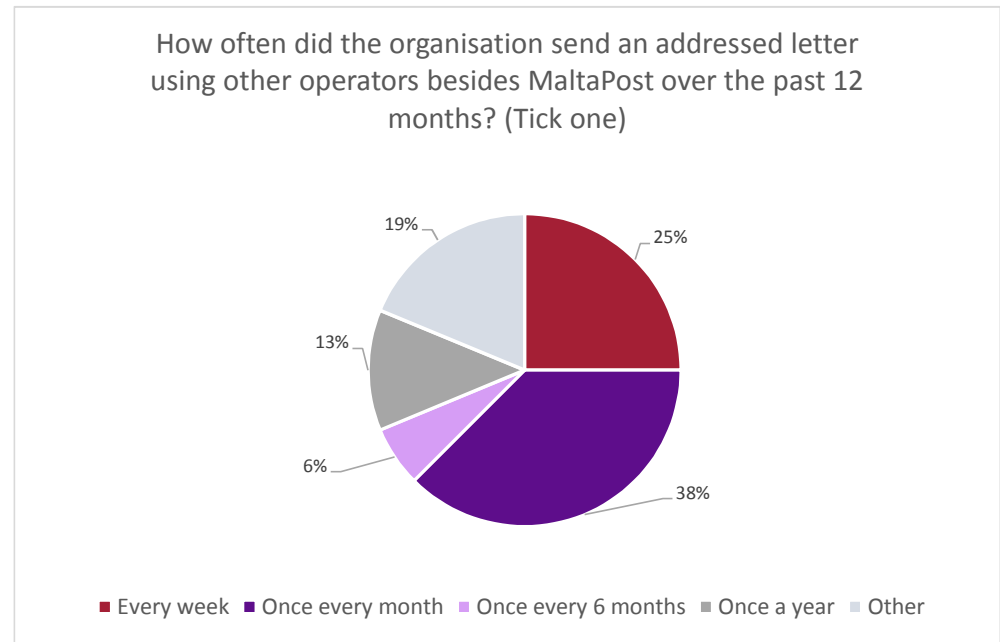


## Operators used - Businesses

Sample size - 283



Sample size - 16



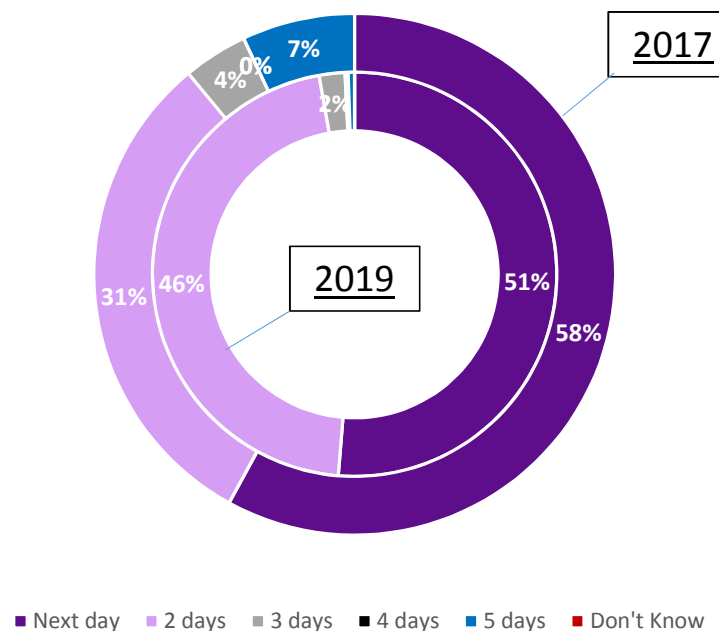
The majority of businesses do not use other operators to send letters. Those that do, generally send letters using such operators once a month or more often (63%). The main reasons given for opting for such operators being: more reliable (56%), more secure (44%), faster (38%), cheaper (25%) and easily accessible (25%).

## Collection and Delivery of Letters - Businesses (1)

Sample size - 390

What, in your opinion, is an acceptable lead-time (in days) from date of posting a letter to actual delivery?

51% of businesses believe that a letter should be delivered by the next day (58% in 2017), while 46% indicated within two days (31% in 2017).

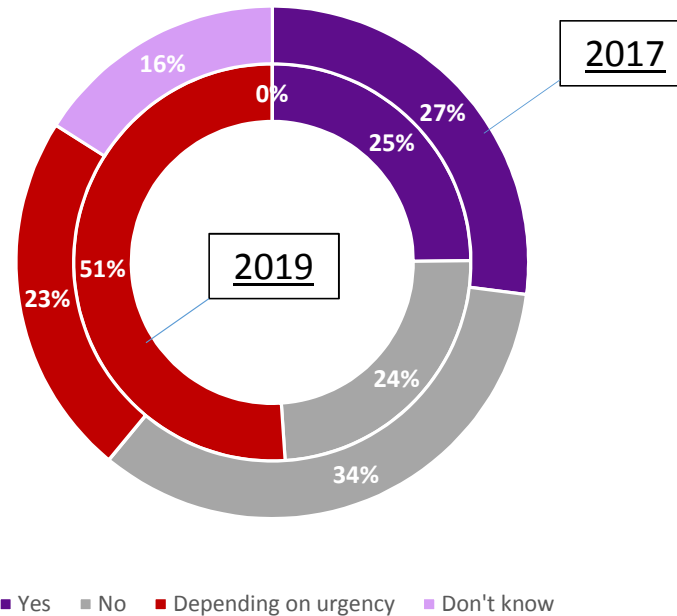


## Collection and Delivery of Letters - Businesses (2)

Sample Size – 390

Would you prefer a postal service that is cheaper/discounted for deferred delivery, whereby your postal article is then delivered after 3 days instead of next day?

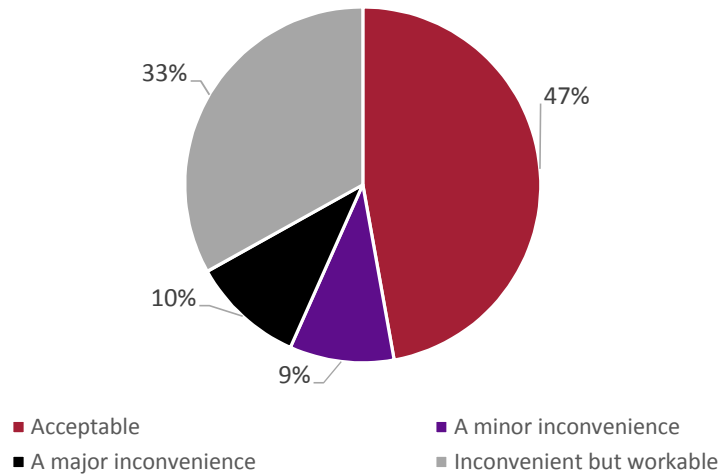
25% would opt for the cheaper option while a further 51% indicated “depends on the urgency”. A total of 24% indicated ‘no’. In 2017 those indicating ‘no’ stood at 34%.



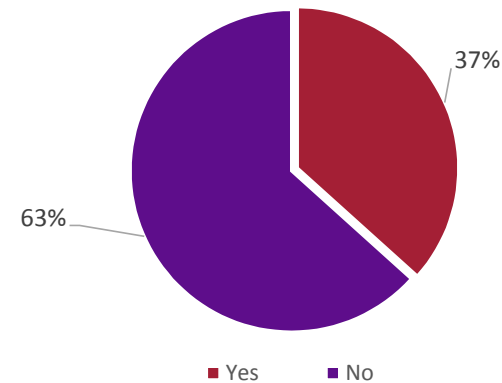
## Collection and Delivery of letters - Businesses (3)

Sample Size – 390

If MaltaPost delivered mail 5 days a week, instead of 6, would your organisation find it to be:



Would your organisation consider it reasonable if prices were to increase in order to maintain the current 6 day (Monday to Saturday) frequency of delivery?



47% of businesses felt that a 5-day week delivery of postal services would be acceptable. A further 33% indicated that though inconvenient, such a situation was workable. 63% of businesses would not however, consider an increase in price reasonable in order to maintain the current 6-day frequency of delivery

## **Section 2.3: Parcel Post**

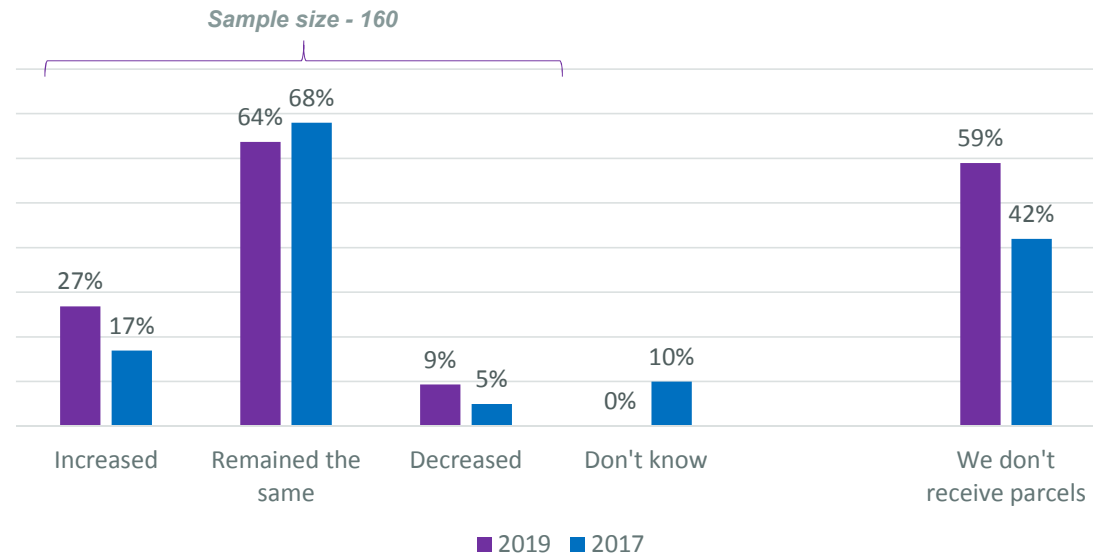


## Delivery of Parcels - Businesses (1)

Total sample size - 390

Can you tell me if the number of addressed parcels (not unaddressed / junk mail) received by the organisation each week has increased, decreased or remained the same over the past twelve months?

59% of businesses do not receive parcels in the past 12 months (42% in 2017). This increased when compared to 2017 (then 42%). Of the respondents who received parcels, the majority 64% claimed to have received the same number of parcels in the past 12 months while 17% claimed to have received more parcels.



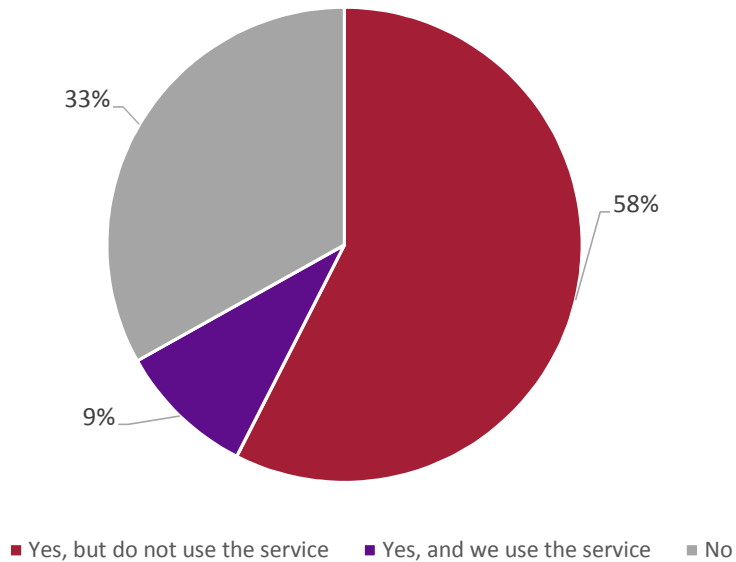




## Delivery of Parcels - Businesses (3)

Sample Size – 160

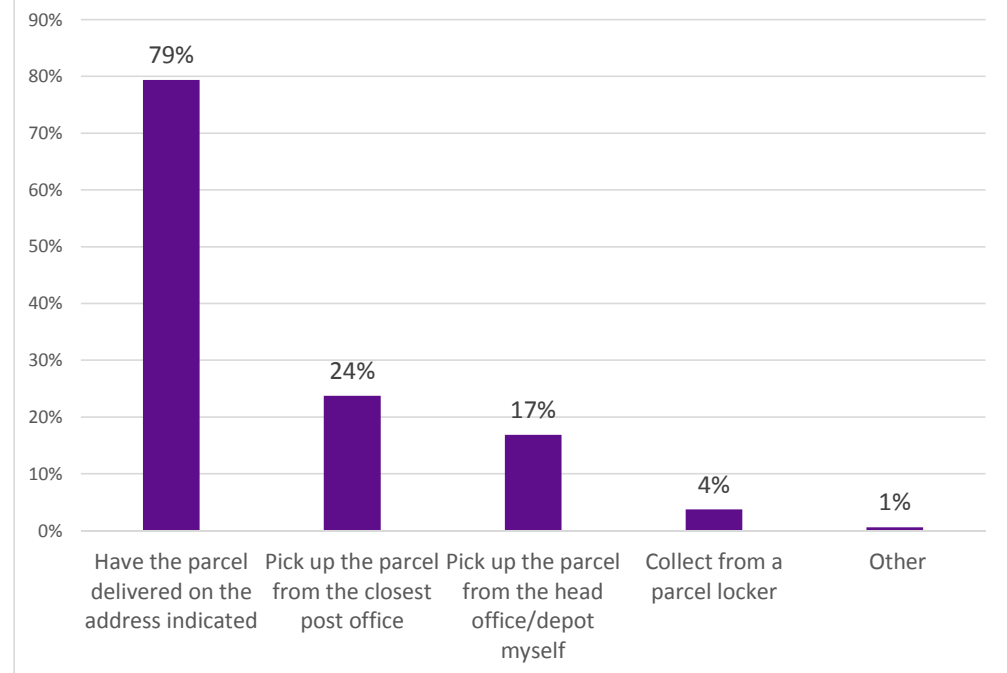
Is the organisation aware of the availability of parcel lockers in some parts of Malta?



Sample Size – 160

Respondents could provide multiple responses

How does your organisation prefer to receive parcels?

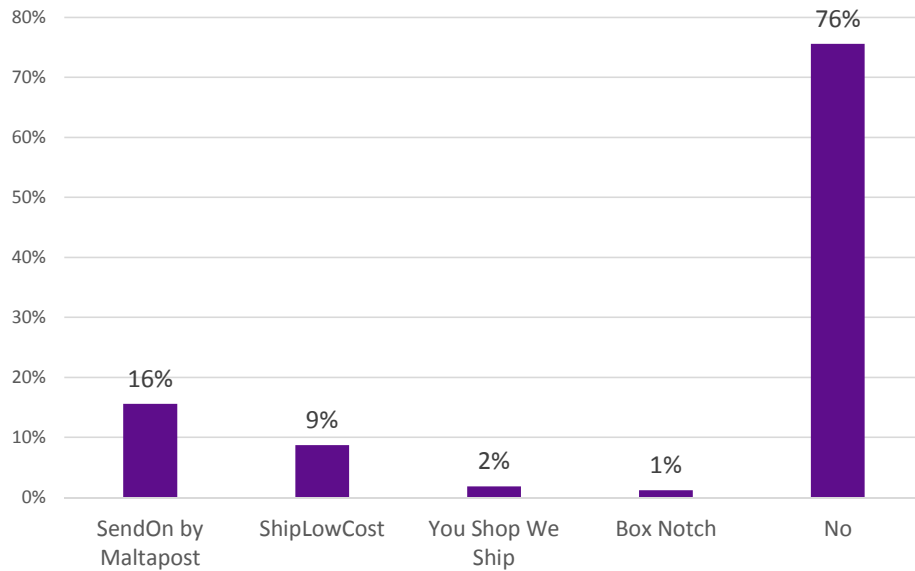




## MaltaPost's Parcel Service - Businesses (1)

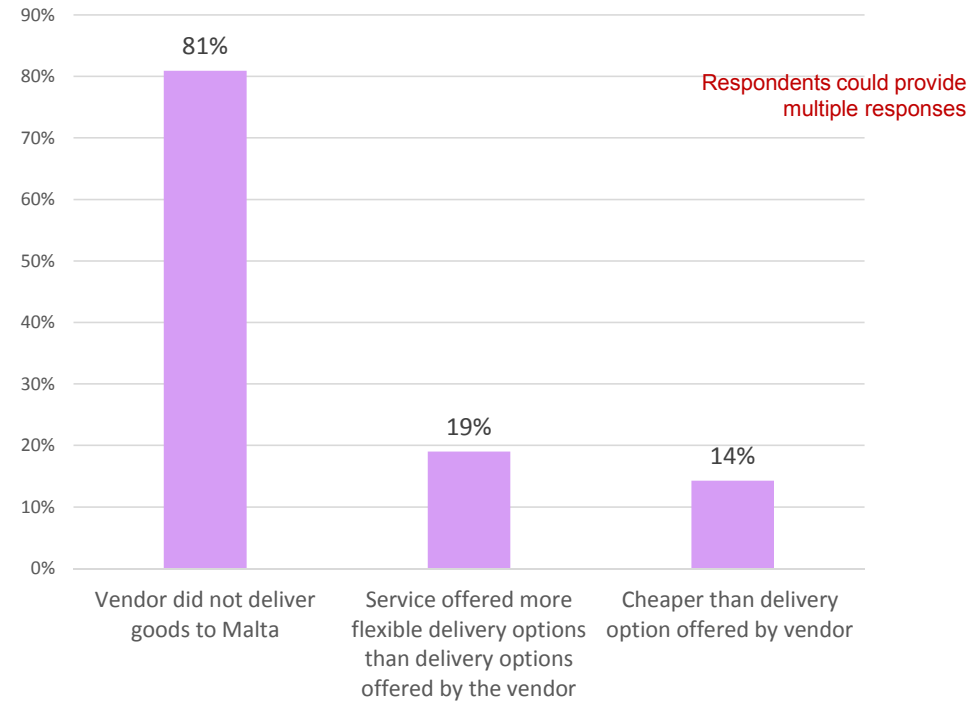
Sample Size – 160

In the last 12 months, has your organisation used any of the following 'postal article forwarding services' when purchasing online?



Sample Size – 42

Why did your organisation make use of such services?





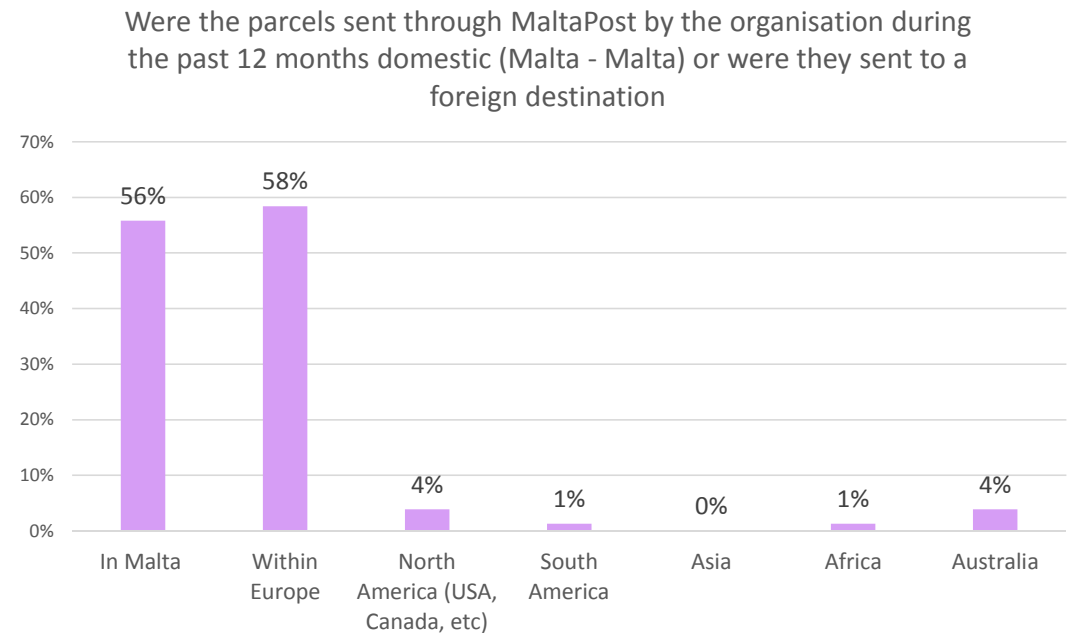
## MaltaPost's Parcel Service - Businesses (2)

How often did the company send a parcel using MaltaPost's service within the last 12 months?

Sample Size – 390

Sample Size – 77

Respondents could provide multiple responses

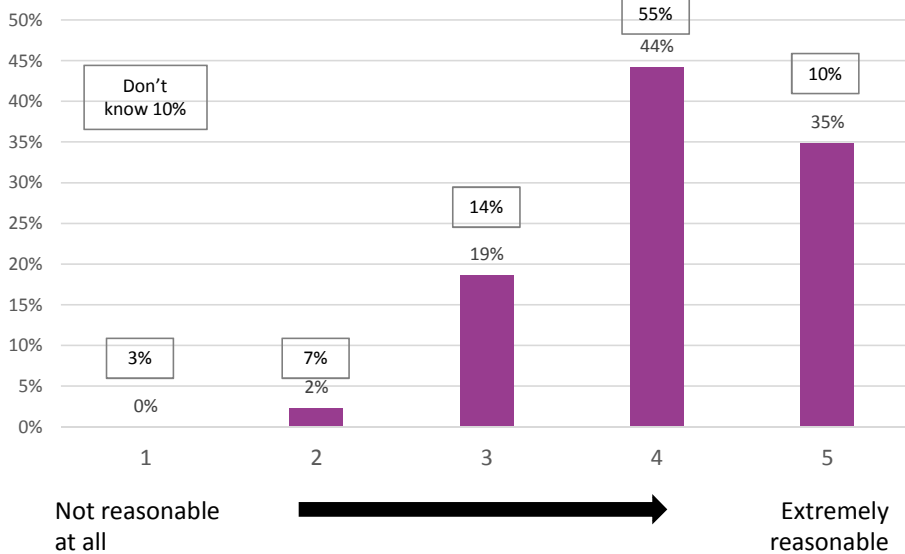




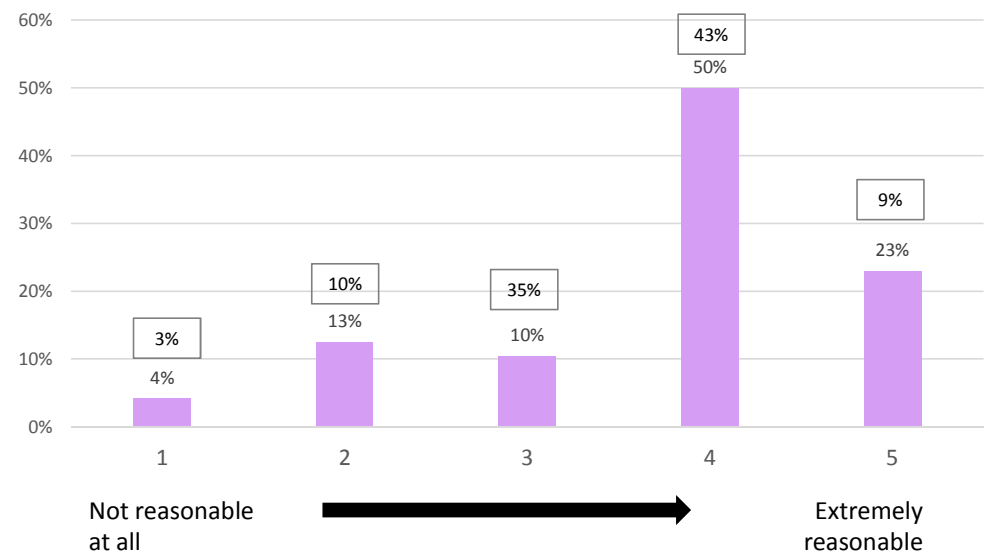
## MaltaPost's Parcel Service - Businesses (3)

Sample Size – 43

How reasonable do you find the price of MaltaPost's domestic (Malta-to-Malta) parcel service?



How reasonable do you find the price of MaltaPost's outgoing (i.e. to foreign destinations) parcel service?



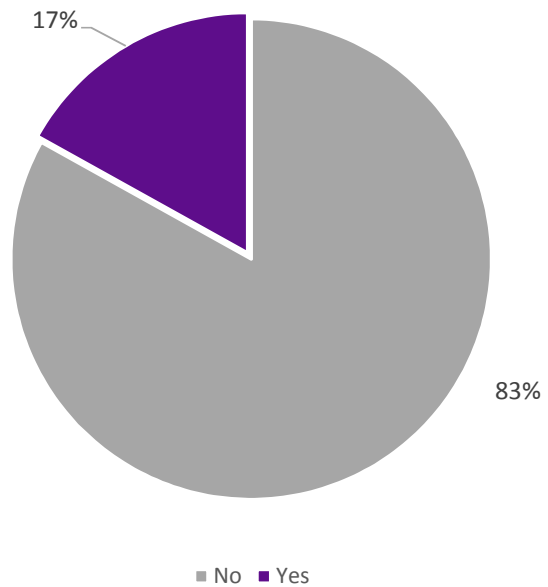
79% of respondents who sent domestic parcels with MaltaPost are satisfied with the price of this service. This represents an increase in satisfaction over 2017 (then 65%). 73% of respondents who sent cross-border parcels with MaltaPost are satisfied with the price of this service. An increase of 20% over 2017.



## Alternative Postal Operators - Businesses (1)

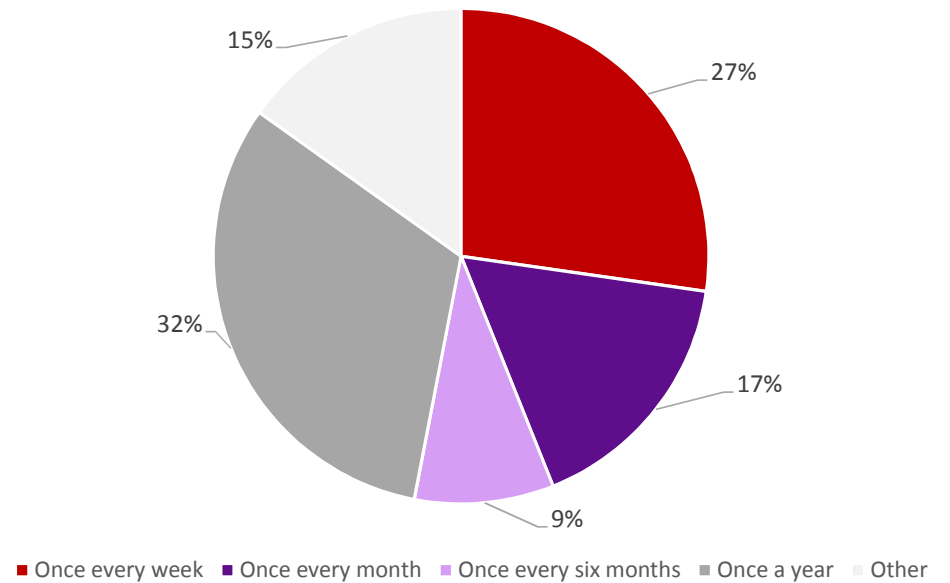
Sample Size – 390

Has the organisation sent a parcel using other operators (i.e. excluding MaltaPost) within the last 12 month



Sample Size – 66

How often did the organisation send a parcel using other operators (excluding MaltaPost) within the last 12 months





## Alternative Postal Operators – Businesses (2)

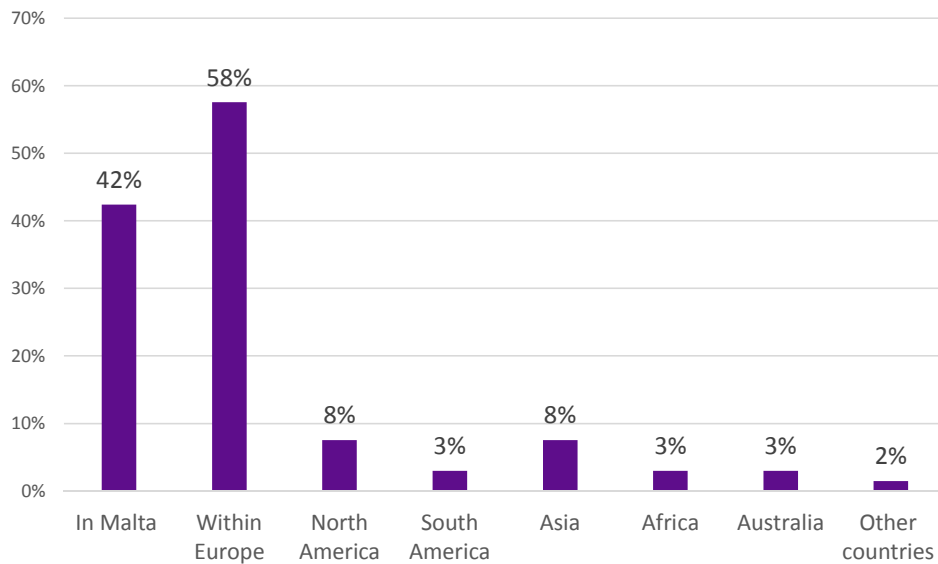
Sample Size – 66

Respondents could provide multiple responses

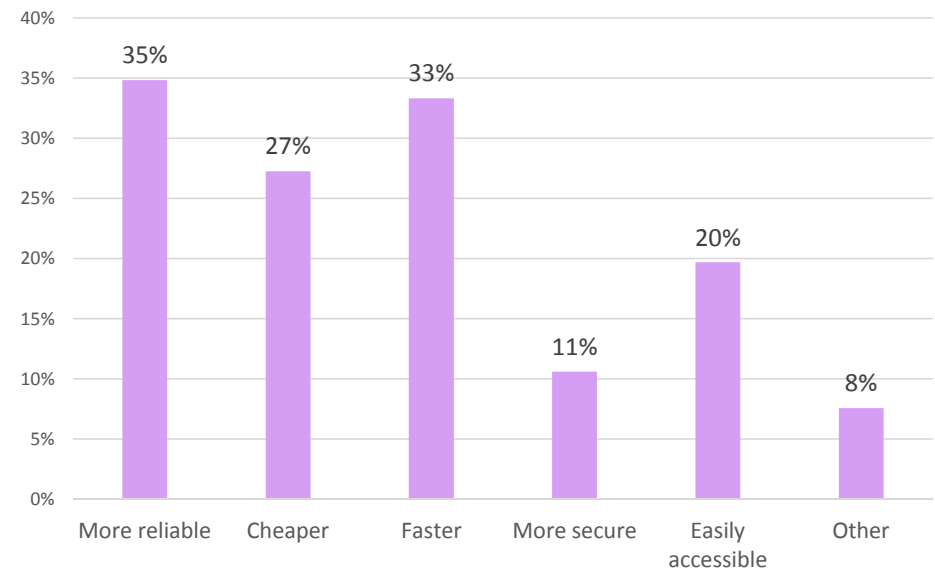
Sample Size – 66

Respondents could provide multiple responses

Were the parcels sent by the organisation using operators (other than MaltaPost) during the past 12 months 'domestic' (Malta-Malta) or sent to another destination



Why did you use the Parcel post services of other operators?



A higher percentage of parcels were sent to countries within Europe (58%) than in Malta (42%).

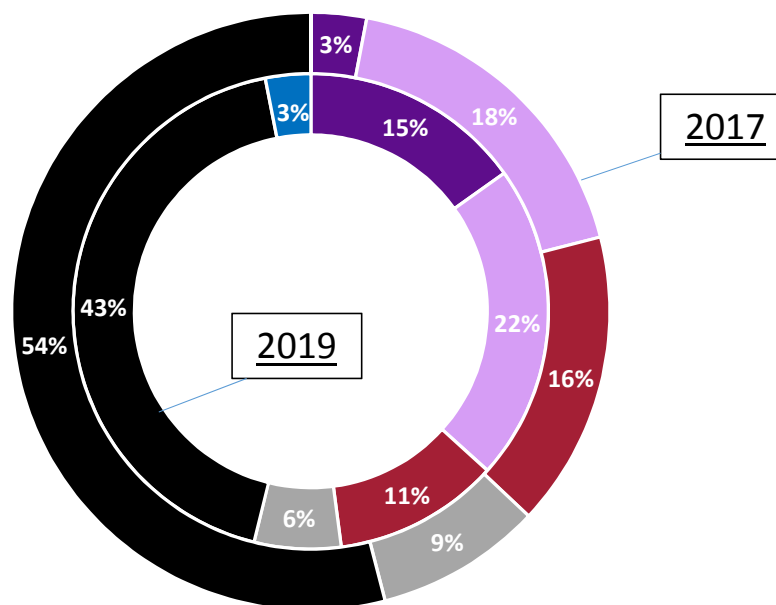
## **Section 2.4: Registered Mail**

## MaltaPost's Registered Mail Service (1)

Has the organisation sent registered mail using MaltaPost over the past 12 months?

Sample Size – 390

57% of businesses sent registered mail over the past 12 months. In 2017 this stood at 46%.

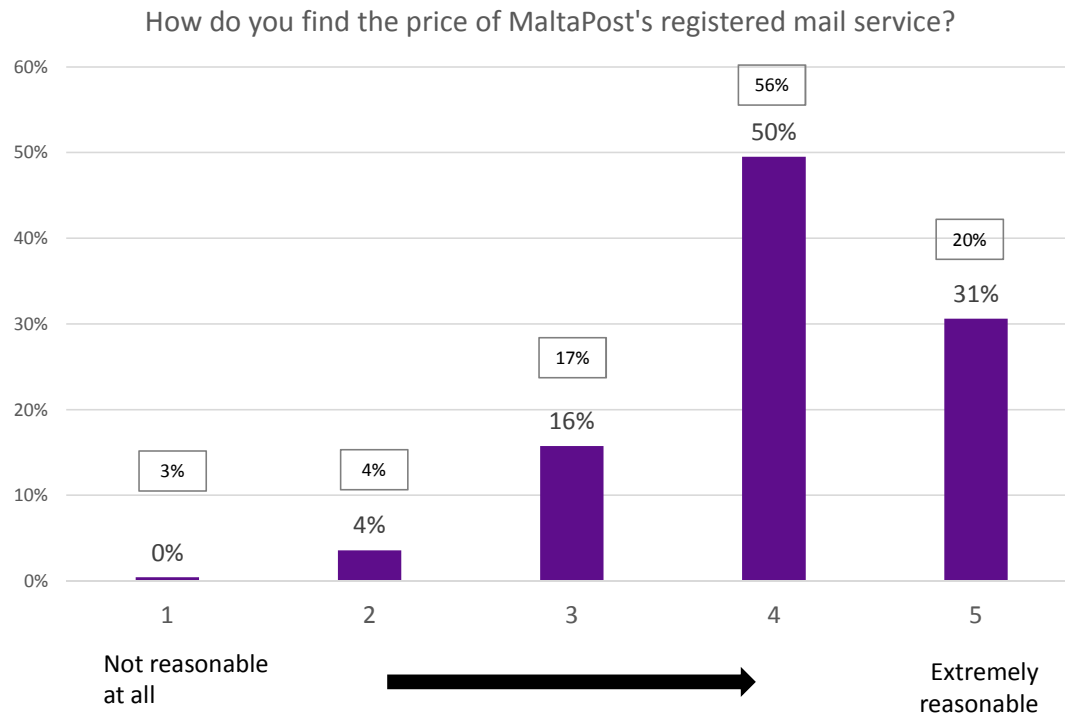


■ Once every week 
 ■ Once a month 
 ■ Once every 6 months 
 ■ Once a year 
 ■ No 
 ■ Other



## MaltaPost's Registered Mail Service (2)

Sample Size – 222



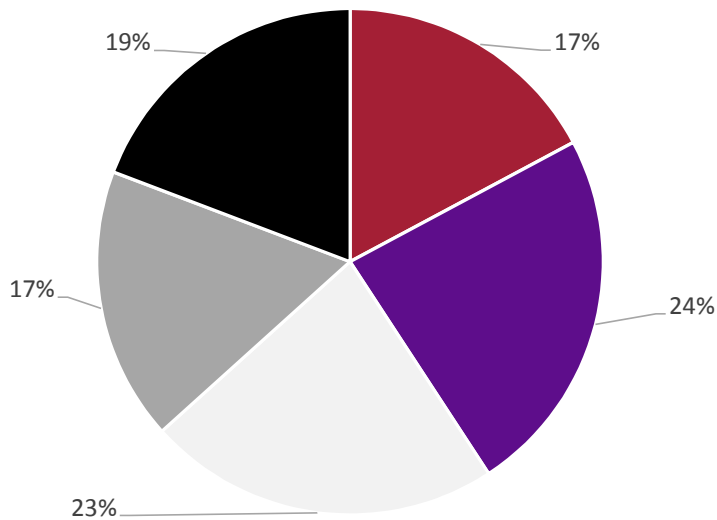
81% of businesses perceive MaltaPost's registered letter mail tariffs to be reasonable. A slight increase over 2017 (then 76%). The proportion of businesses who perceive registered mail tariffs as being unreasonable has decreased from 7% in 2017 to 4% in 2019.



## MaltaPost's Registered Mail Service (3)

If MaltaPost made one delivery attempt instead of two for delivering registered mail to your premises, would your organisation find it to be :

*Sample size - 390*



17% of businesses would find it acceptable if MaltaPost made one delivery attempt instead of two for delivering registered mail.

■ Acceptable ■ Inconvenient but workable ■ Makes no difference ■ A minor inconvenience ■ A major inconvenience

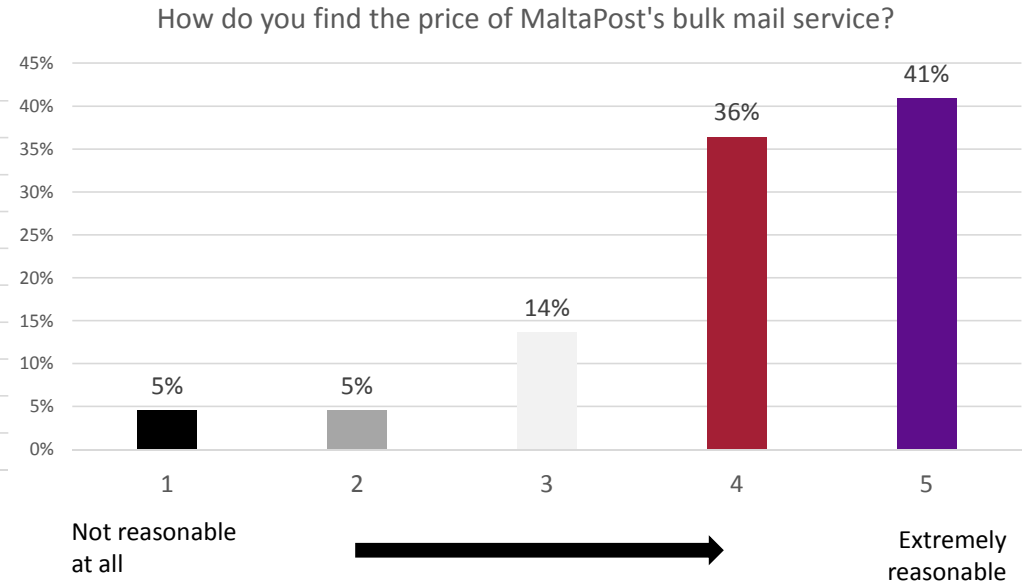
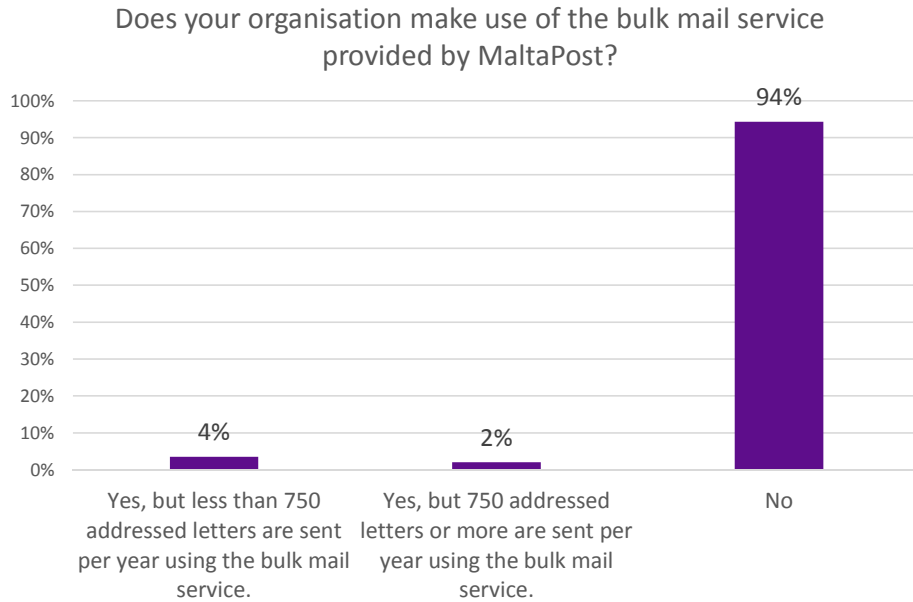
## **Section 2.5: Bulk Mail**



## Bulk Mail - Businesses

Sample Size – 390

Sample Size – 22



The majority of entities do not make use of bulk mail. Among businesses that do make use of MaltaPost's bulk mail service, 77% are satisfied with the service offering.

**Section 2.6:**  
**MaltaPost's Website and Offices Services**

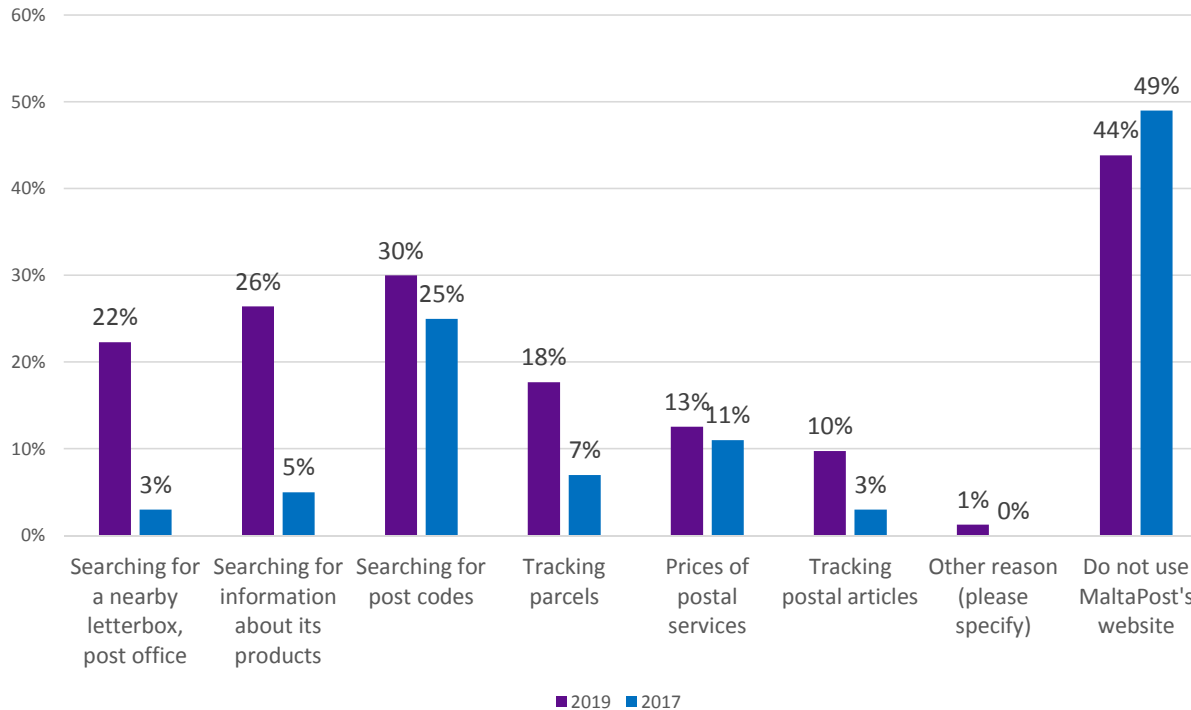


## MaltaPost's Website - Businesses

Sample Size – 390

Respondents could provide multiple responses

What are the main reasons for using MaltaPost's website?



44% of businesses do not use MaltaPost's website (49% in 2017). Among those that do/did, 'search for post codes' was the primary reason for using MaltaPost's website (30%).

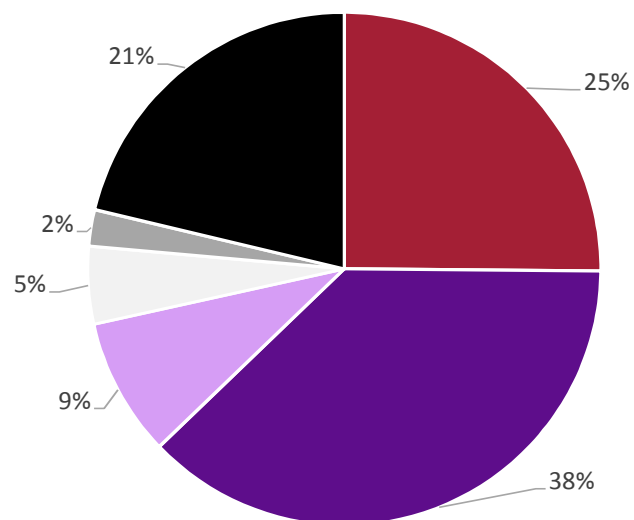


## Post Office Services - Businesses (1)

Sample Size – 390

Has the organisation made use of the post office in the last 12 months?

A total of 79% of businesses indicated to have used the post office at one point or another over the past 12 months. This is an increase over 2017 when 51% had indicated to have done so.



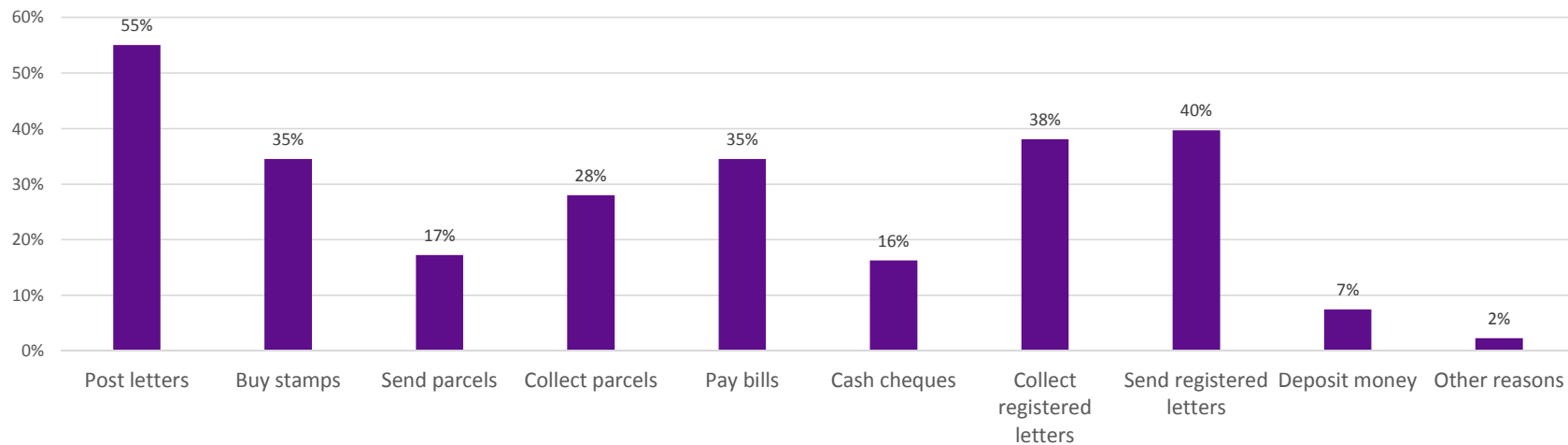
■ Yes, every week ■ Yes, every month ■ Yes, every quarter ■ Yes, every 6 months ■ Yes, once ■ No

## Post Office Services - Businesses (2)

Sample Size – 307

Respondents could provide multiple responses

Which services did the organisation make use of when visiting the postal office?



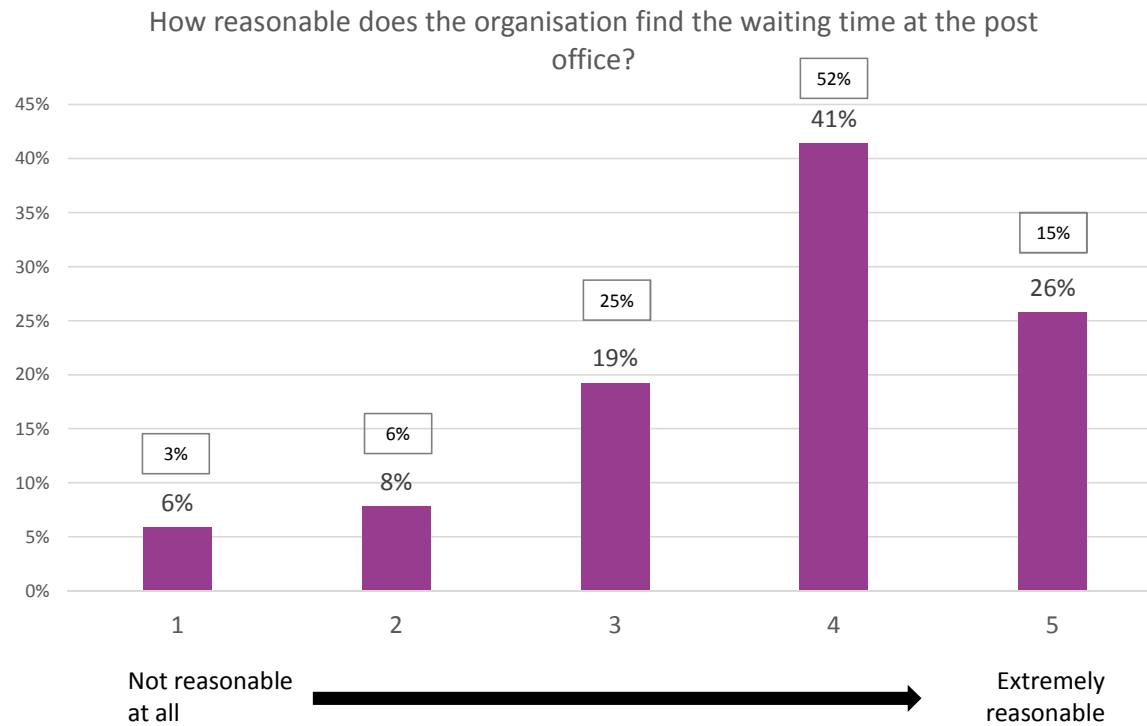
The main reason why businesses visit the post office is to post letters (55%).





## Post Office Services - Businesses (3)

Sample Size – 307

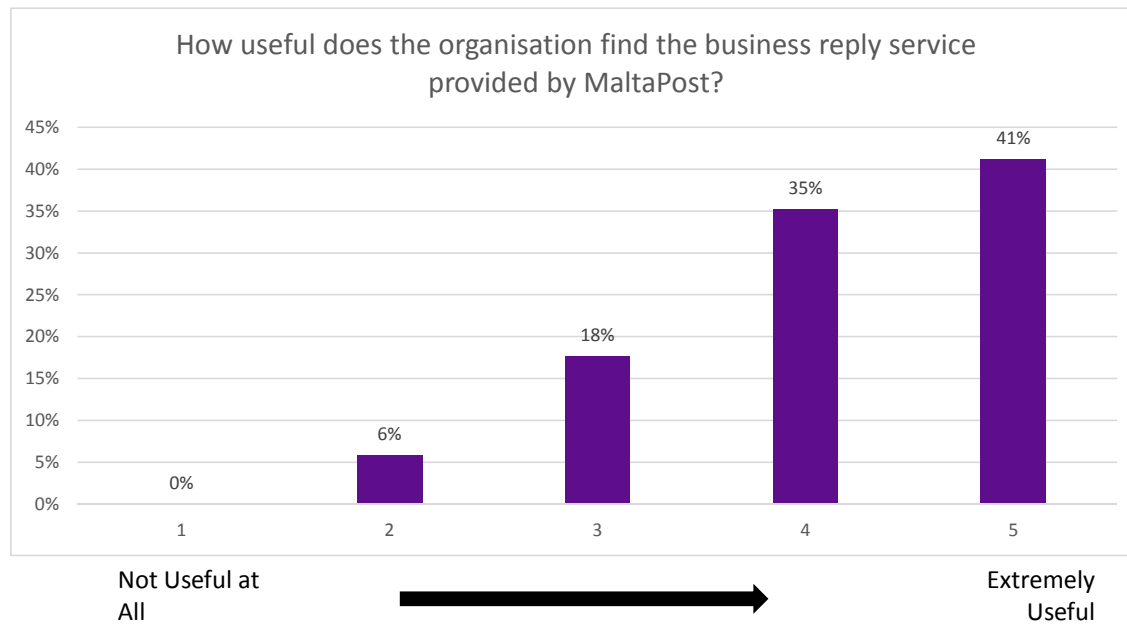


67% of businesses are happy with the waiting time (67% in 2017).



## Post Office Services - Businesses (4)

Sample Size – 17



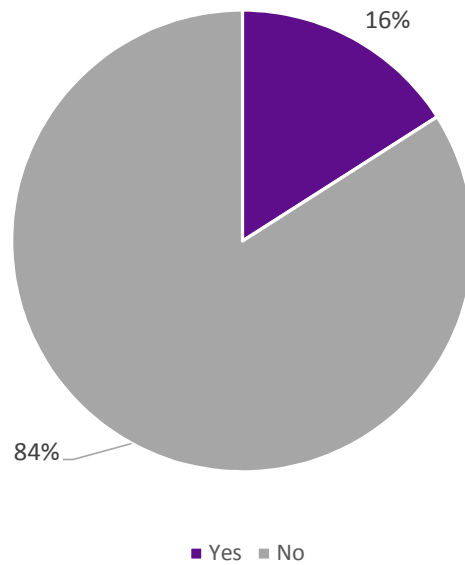
A total of 17 entities indicated to use this service. Of these, 76% (13) found MaltaPost's business reply service as useful.



## Contact & Complaint Issues - Businesses (1)

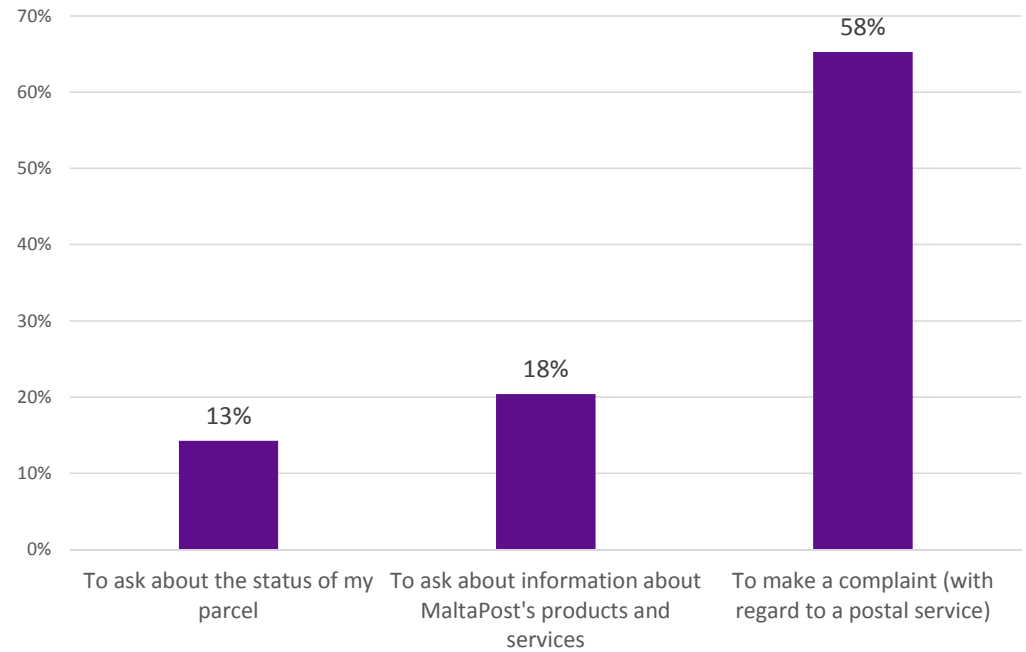
Sample Size – 307

In the last 12 months did your organisation contact MaltaPost?



Sample Size – 55

Why did the organisation contact MaltaPost?



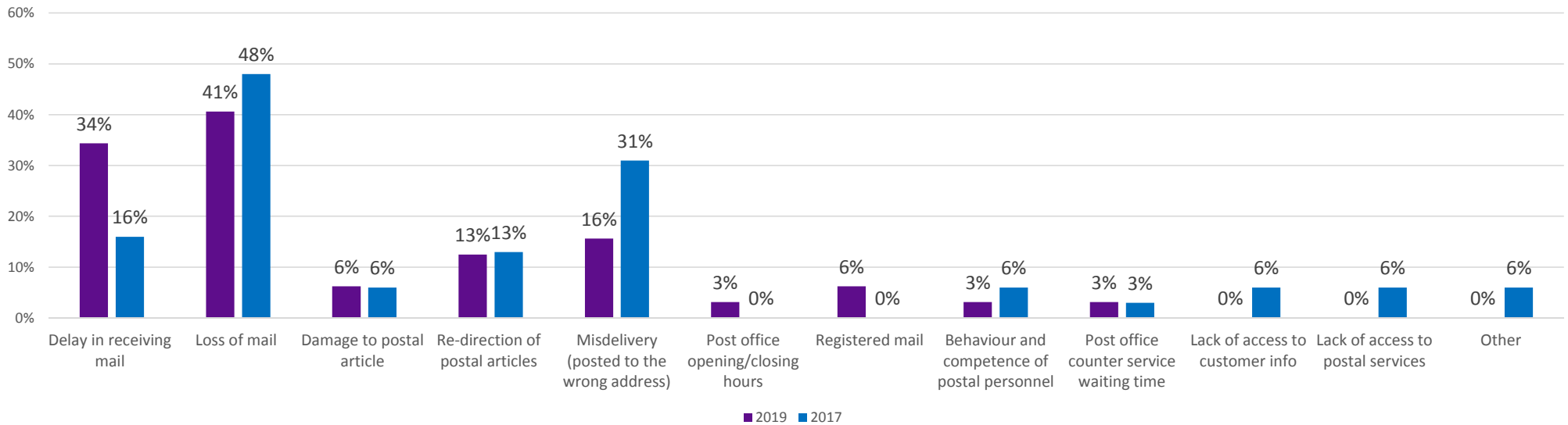


## Contact & Complaint Issues – Businesses (2)

Sample Size – 32

Respondents could provide multiple responses

What were the reasons for the organisation's complaint(s)?

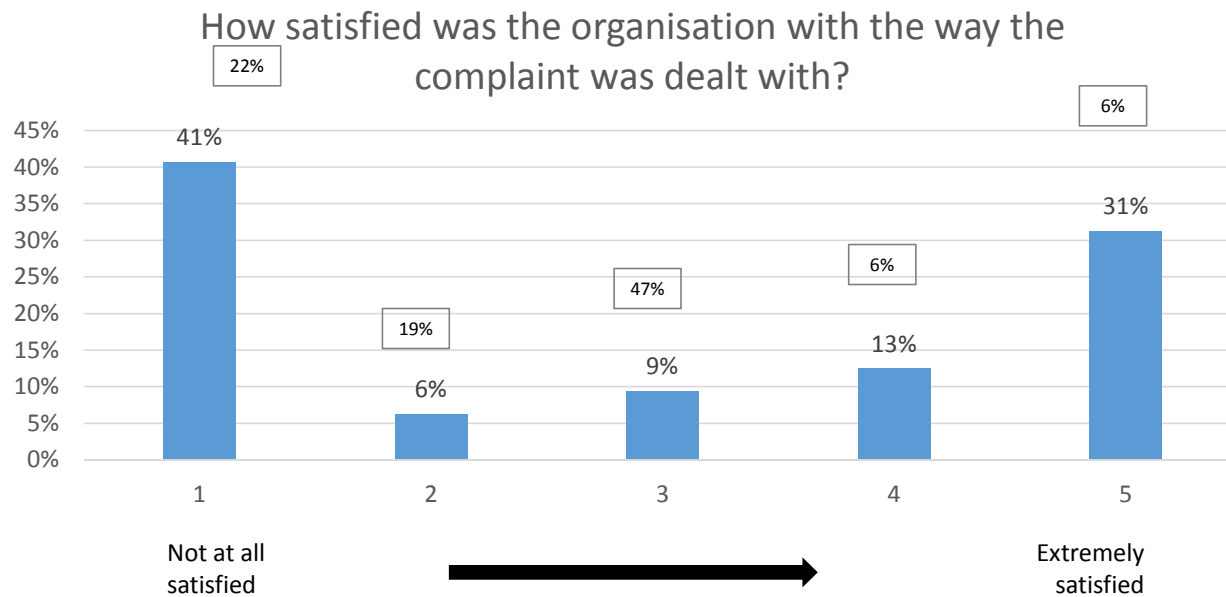


The two main complaints made by businesses were 'loss of mail' (41%) and 'delay in receiving mail' (34%)



## Contact & Complaint Issues – Businesses (3)

Sample Size – 32

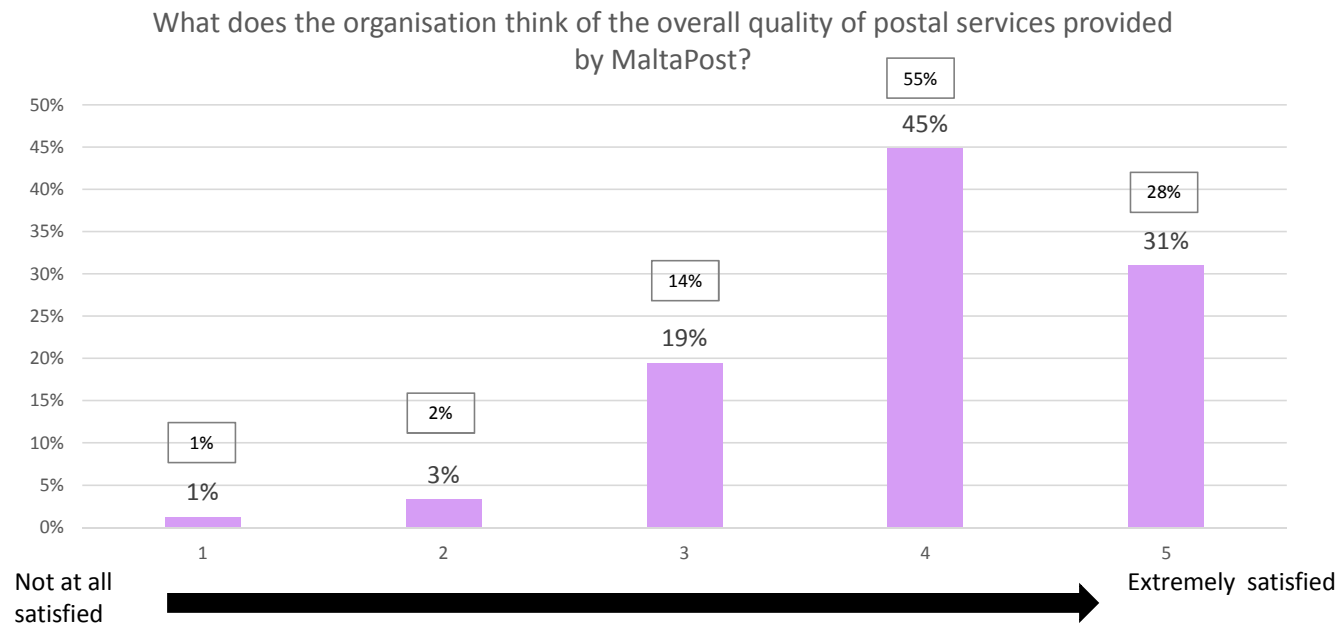


44% of businesses that made a formal complaint with MaltaPost were satisfied or highly satisfied with the way their complaint had been handled [12% in 2017]. The percentage of businesses that were dissatisfied increased too, but to a lower extent (now standing at 47%, then 41%).



## Overall Satisfaction with MaltaPost Services - Businesses

Sample Size – 390



76% of businesses perceive the overall quality of postal services provided by MaltaPost to be good or very good. Results are slightly lower than in 2017 (then 83%).

## Highlights



## Main Highlights (1)

- The majority of respondents ( 28%) were not aware of their **expenditure** on postal services. Respondents who gave an answer tended to spend within the lower brackets, with the majority (48%) claiming to have spent €100 or less in the twelve months preceding the survey.
- Of those respondents who claimed to have sent more letters cited reasons such as **marketing campaigns** (52%) and **printed bills** (29%) as the cause.
- The majority (72%) pointed to **email** as the reason for sending fewer letters, followed by **use of voice communications** (62%) and **messaging services** (28%).
- 68% of businesses would opt for non-postal alternatives if the price of a 50g letter were to increase (by 5% - 10%).





## Main Highlights (2)

- Participants were also asked about what **lead-time** (in days) from the date of posting a letter to actual delivery they would find acceptable. 51% of respondents claimed that they would find next day delivery acceptable.
- 47% of respondents claimed that they would find a 5-day delivery week acceptable.
- 79% of respondents claimed to have visited a post office in the 12 months preceding the survey. The main reasons for visiting the post office were; to send letters and send registered letters (55% and 40% respectively).
- 8% of respondents claimed to have made a complaint with MaltaPost. Complaints mainly related to loss of (48%) and delay in receiving mail (34%).

**Section 3:  
Booster Sample: Small, Medium & Large Size  
Businesses**



## Purpose & Methodology

*EMCS Ltd carried out the survey between January and February 2019 on behalf of the MCA*

### Fieldwork

- Interviews were carried out by telephone lasting around 20 minutes
- The survey respondents were chosen randomly from the Yellow Pages Directory
- Interviews on behalf of the organisation were carried out with those responsible for mail items within the business

### Sample

- Sample size was representatively distributed across 7 predefined industries of the business sector in Malta (Source: NACE Codes)
- The interviews were carried out with businesses that have been randomly selected on the basis of this distribution
- To capture more qualitative information on medium to large sized businesses, the 10– 49 and 50+ employee categories were boosted

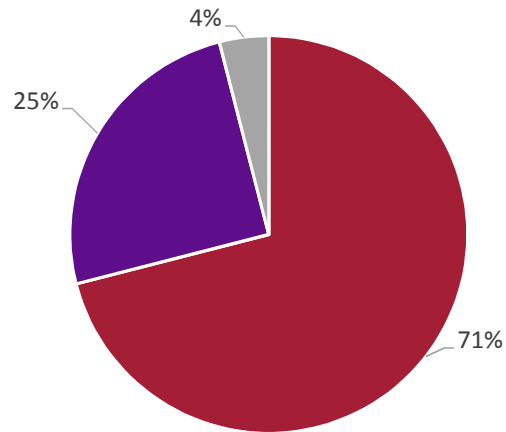
### Responses

- 156 respondents
- Any refusals / incomplete surveys were re-allocated to achieve a net sample of at least 156 interviewees

# Responses Distribution

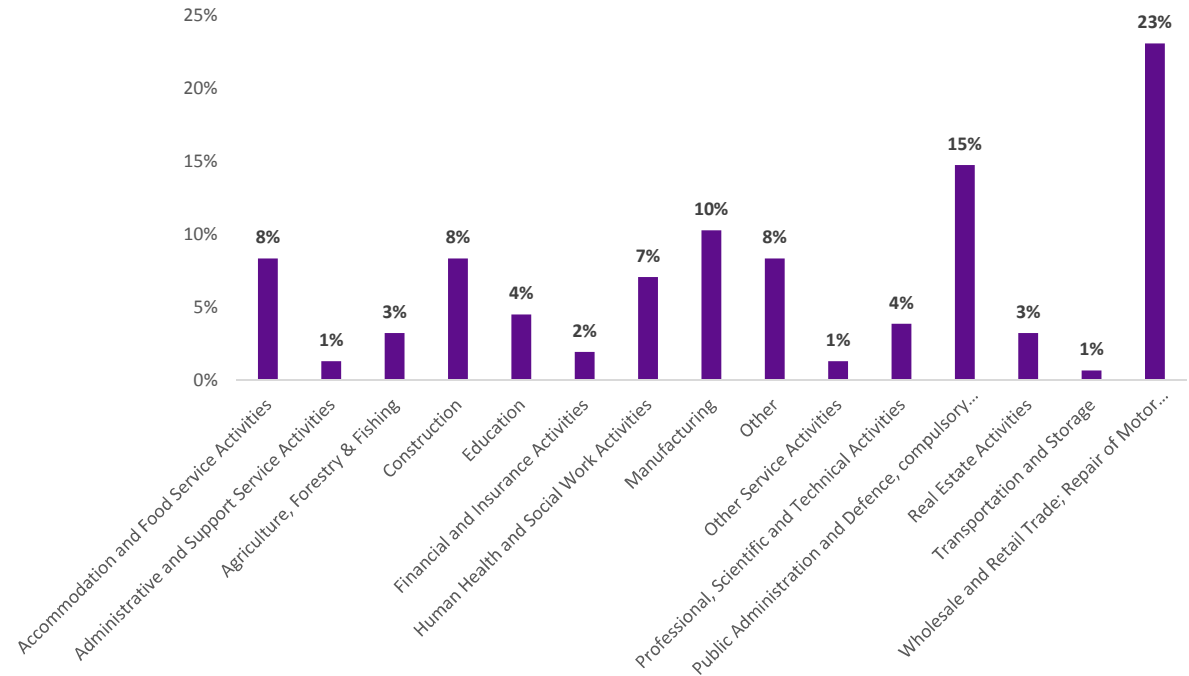
Sample size – 156

How many people does your company employ?



- 10-49 imjegati / 10-49 employees (small enterprise)
- 50 - 249 imjegati / 50 - 249 employees (medium-sized enterprise)
- 250+ imjegati / 250+ employees (large enterprise)

Indicate the industry in which your business operates?

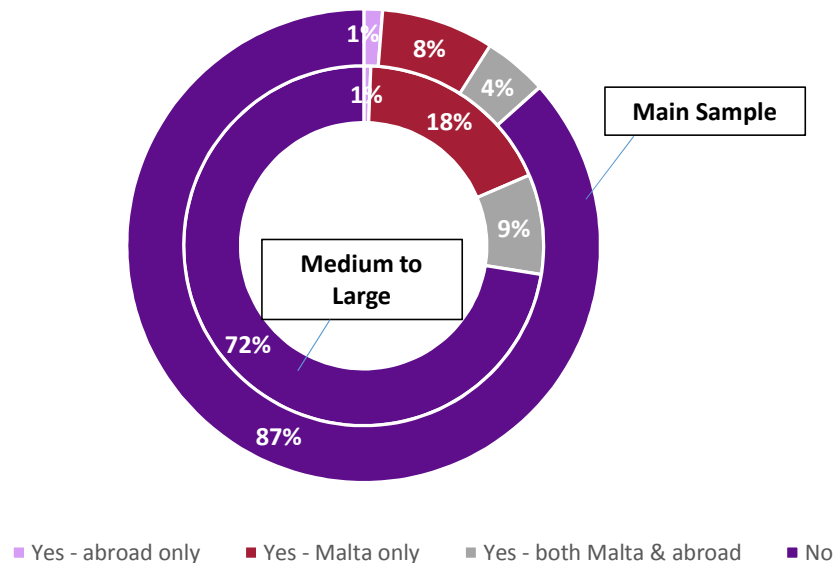


**Section 3.1:**  
**Product sales over the internet**

## Product Sales over the Internet – Small, Medium & Large Size Businesses

Sample size – 156

Does your company sell products/services over the internet?



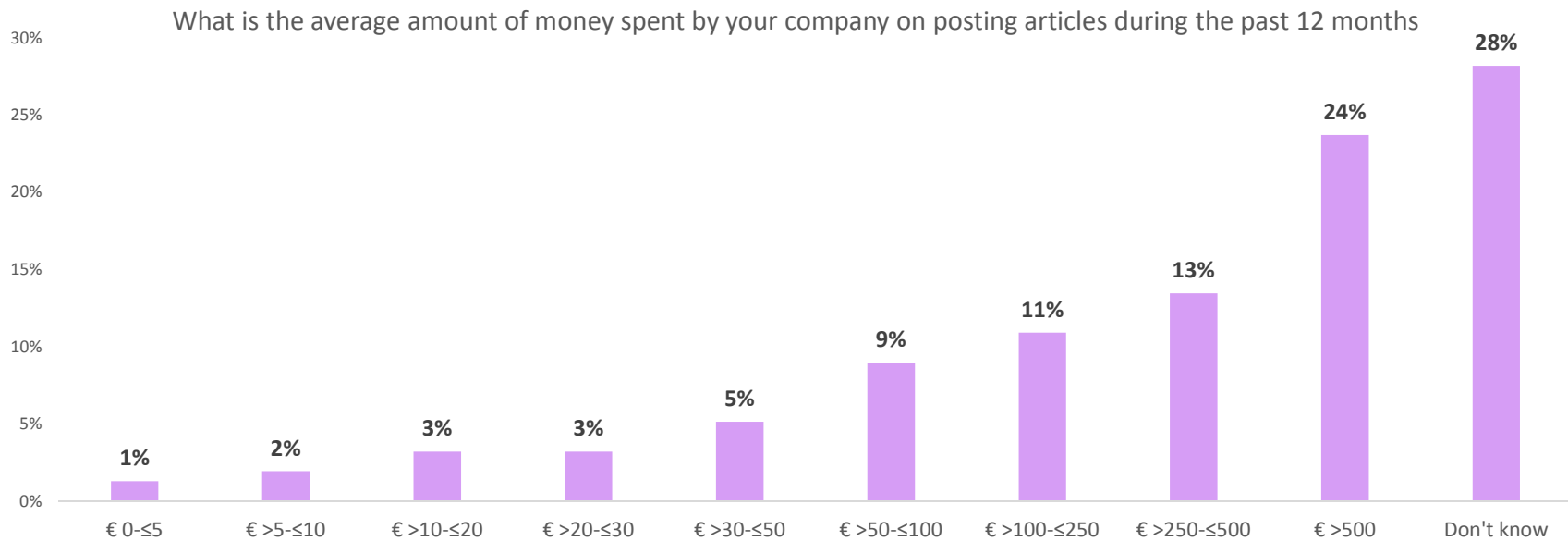
A larger proportion of small to large entities indicated to sell products/services over the internet than the main sample.

**Section 3.2:**  
**Addressed Letter Mail**



## Expenditure on Addressed Letters – Small, Medium & Large Size Businesses (1)

Sample size – 156



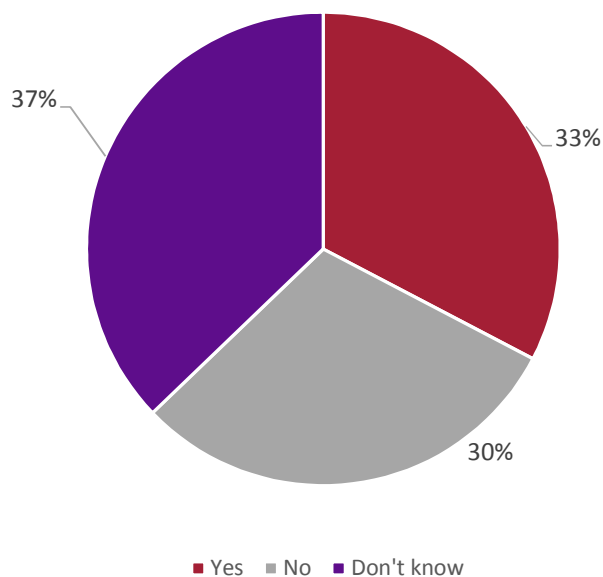
24% of medium to large size businesses claimed to have spent more than €500 a year on addressed letters



## Expenditure on Addressed Letters – Small, Medium & Large Size Businesses (2)

Sample size – 156

Do you consider that this financial outlay on posting articles (during the past 12 months) as being significant for your company?



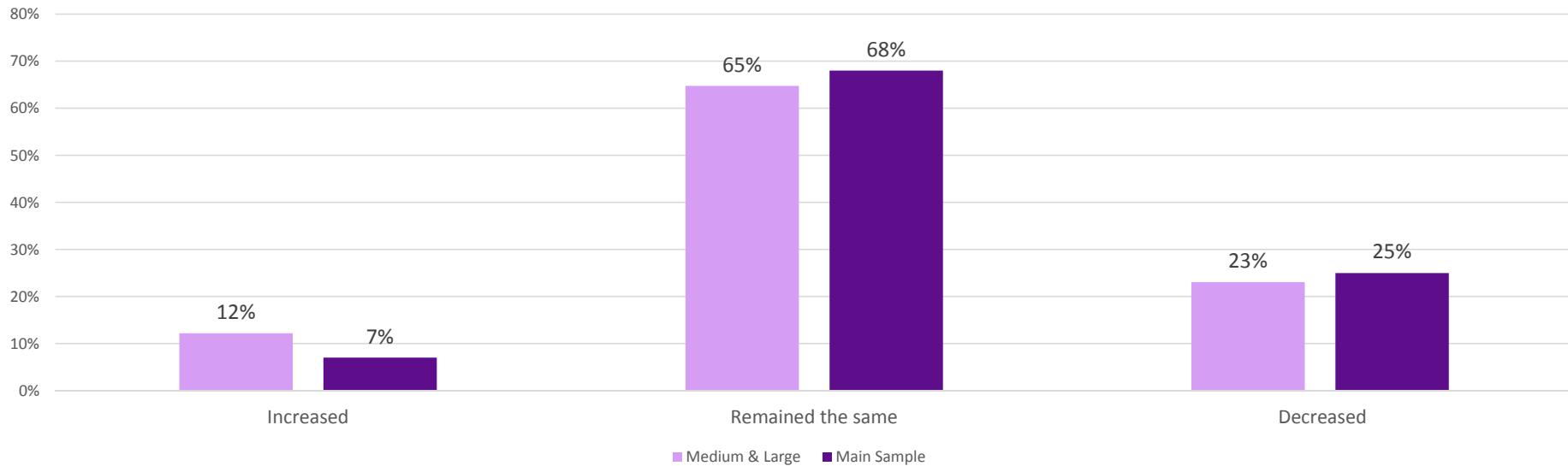
33% of small to large size businesses consider the financial outlay on posting article to be significant for their company. Conversely, 30% did not consider such outlay to be considerable.



## Activity of Postal Services – Small, Medium & Large Size Businesses (1)

*Sample size is 156*

Can you tell me if the number of addressed letters (not unaddressed/junk mail) RECEIVED by the organisation each week has increased, decreased or remained the same over the past twelve months

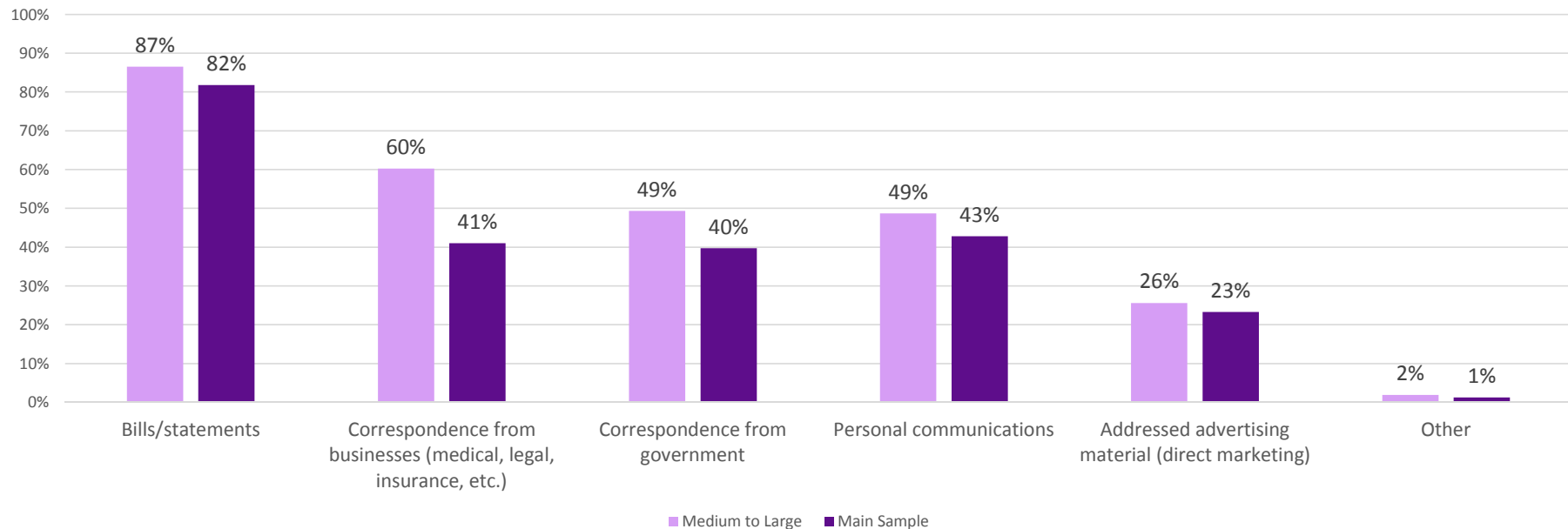


65% of the booster sample indicated the number of addressed letters received by their business have remained the same. Figures from this cluster indicate no significant variance from the main sample.

## Activity of Postal Services – Small, Medium & Large Size Businesses (2)

Sample size is 156

What type of addressed letters did your organisation **RECEIVE** over the past 12 months- (Tick all that apply, beginning with the category of letter mail which is most often received)



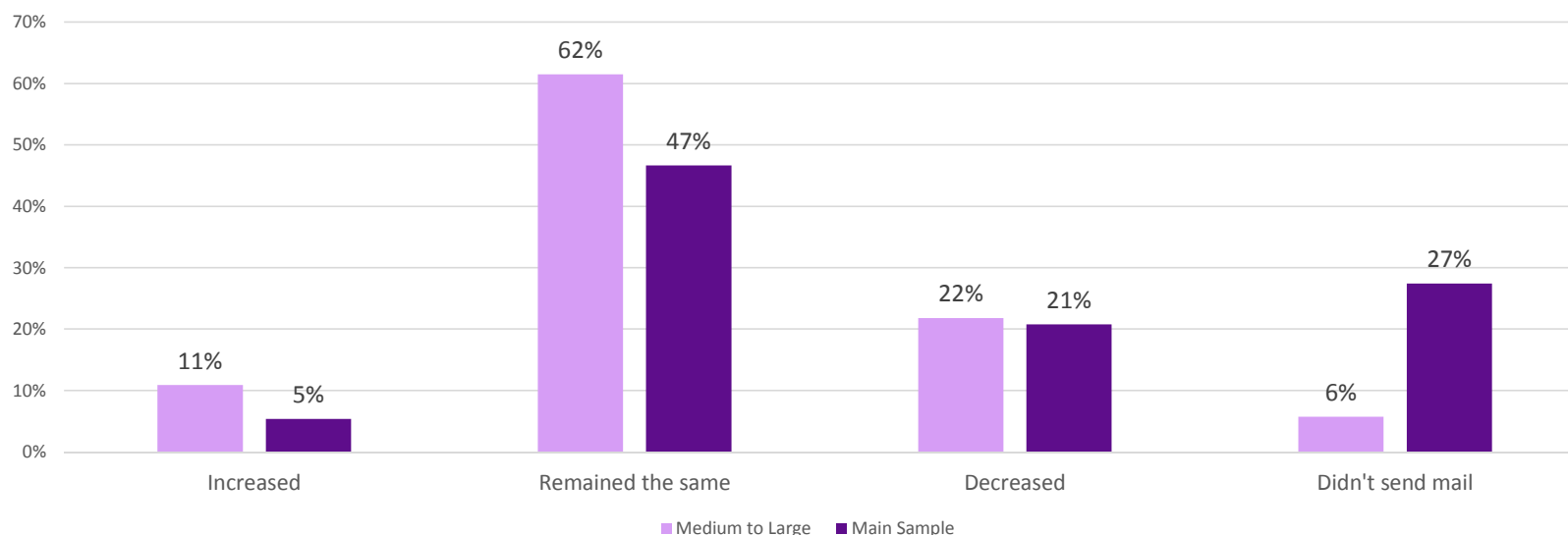
The figures indicate a similar trend between small to large businesses and the general sample, with the former indicating a higher response rate for each sub-category.



## Activity of Postal Services – Small, Medium & Large Size Businesses (3)

Sample size is 156

Did the number of addressed letters SENT by your organisation increase, decrease or remain the same over the past twelve months?



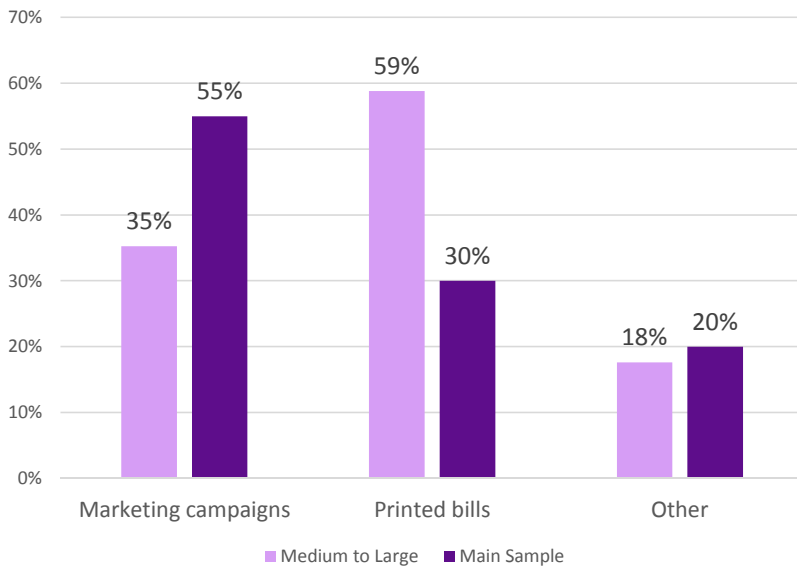
11% of the booster sample indicated the number of addressed letters received by their business to have increased. Such figure is double that of the main sample.



Sample size is 17

Multiple responses possible

What are the main reasons for the **INCREASE** in the number of addressed letters sent by the organisation

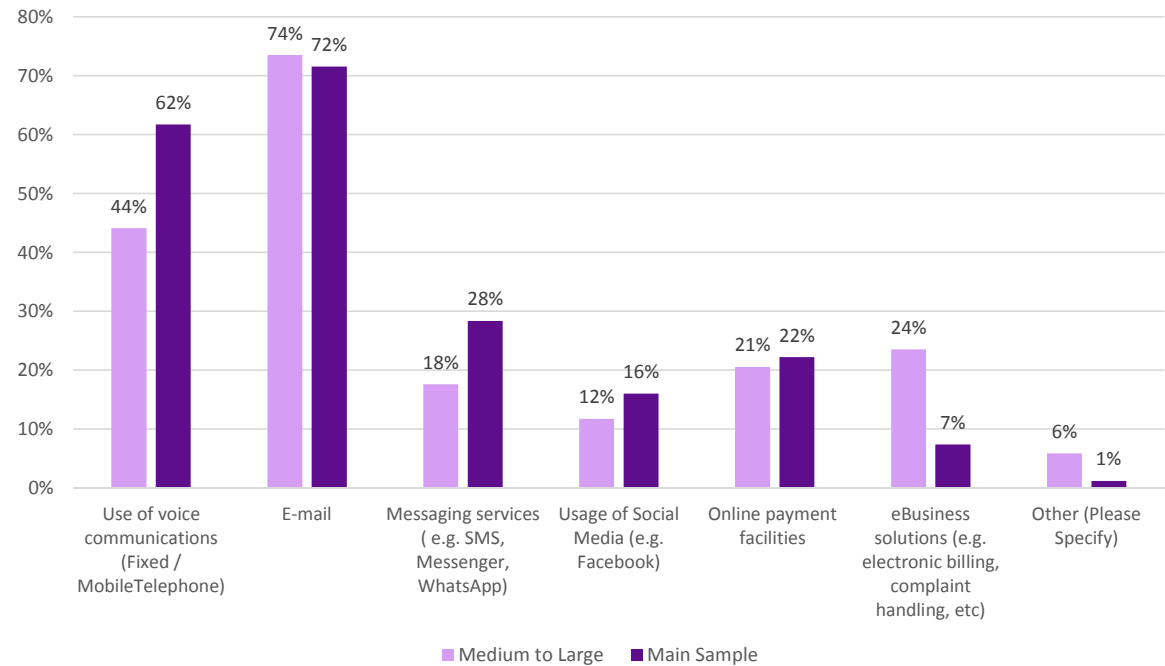


## Activity of Postal Services – Small, Medium & Large Size Businesses (4)

Sample size is 34

Multiple responses possible

What are the main reasons for the **DECREASE** in the number of addressed letters sent by the organisation



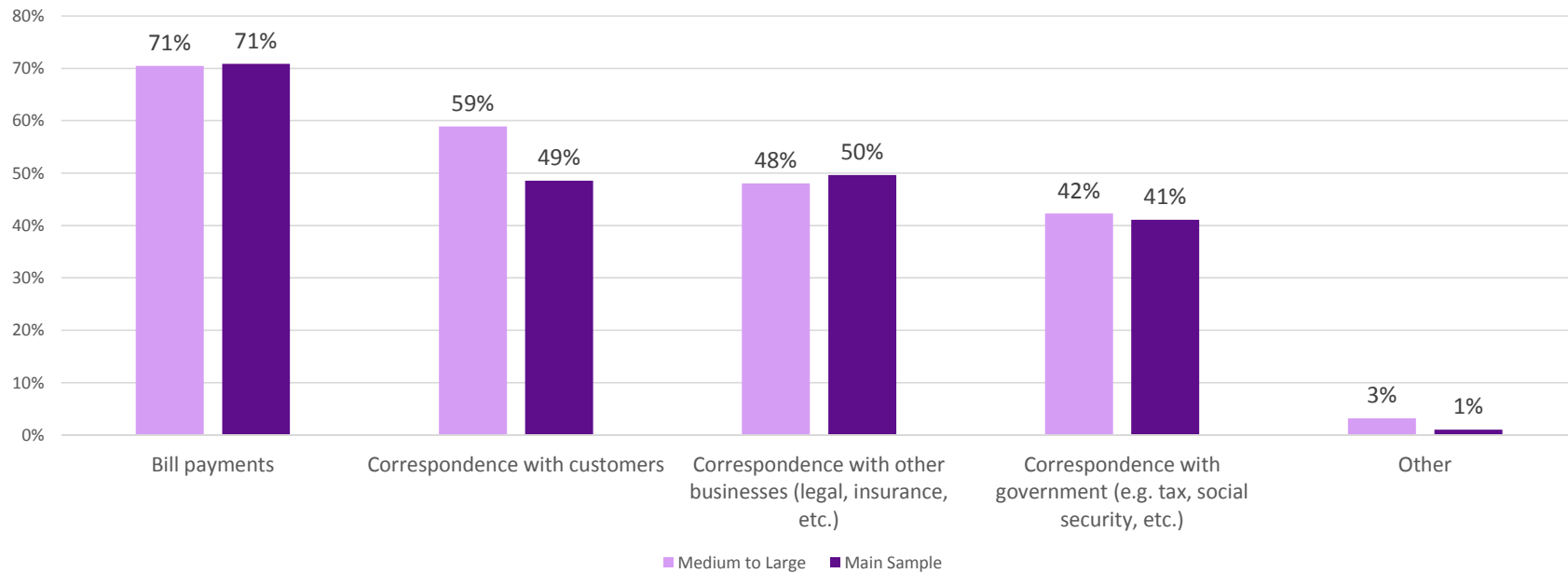


## Activity of Postal Services – Small, Medium & Large Size Businesses (5)

Sample size – 156

Multiple responses possible

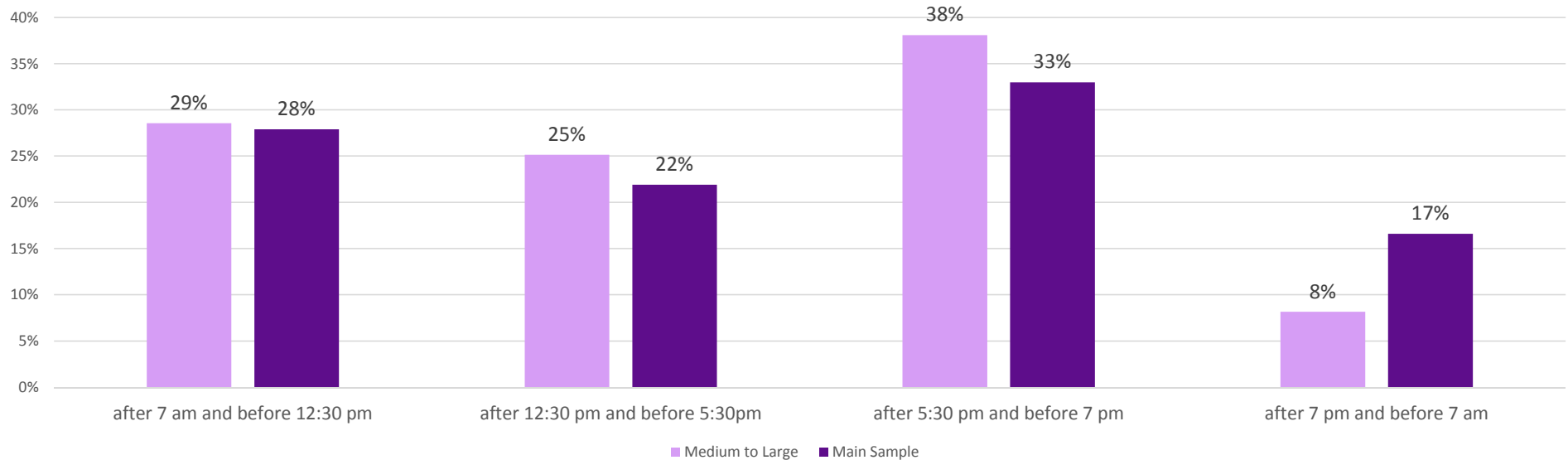
What type of addressed letters did your organisation **SEND** over the past twelve months?



## Activity of Postal Services – Small, Medium & Large Size Businesses (6)

Sample Size – 147

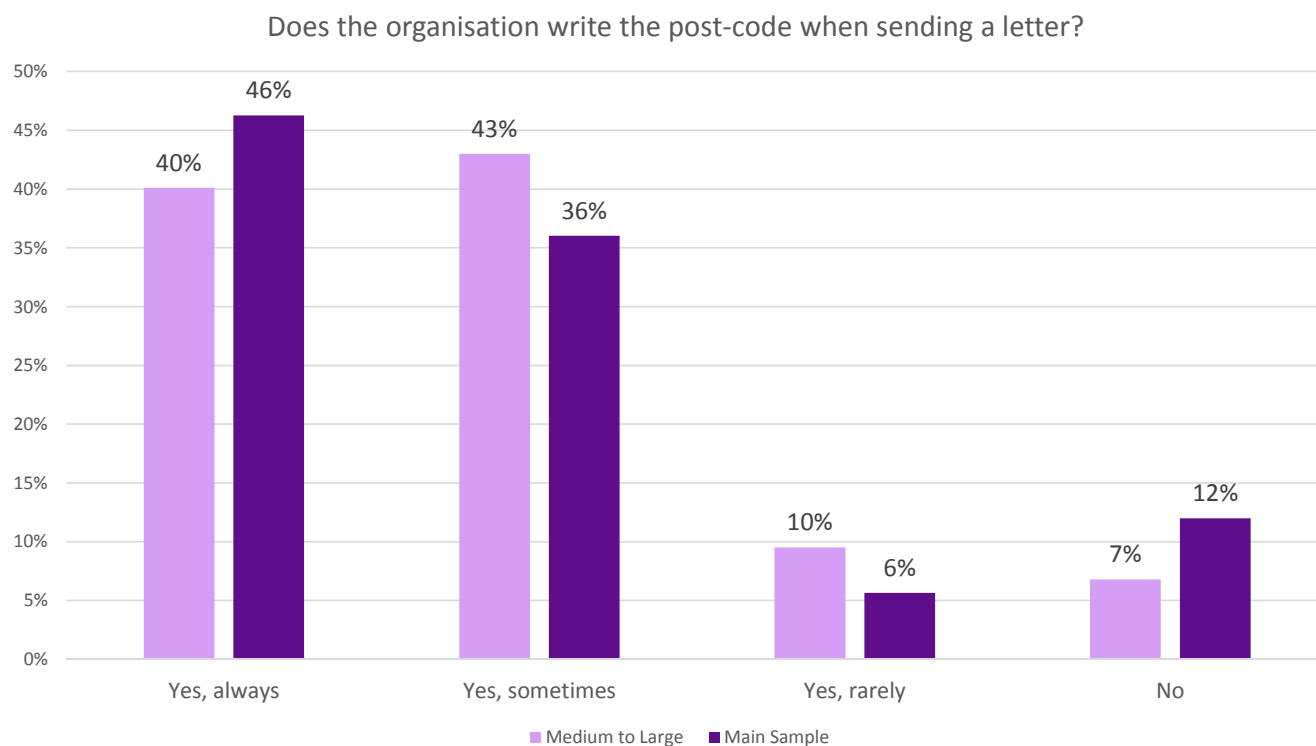
What is the most convenient time of the day (Monday to Saturday) for your organisation to post a letter in a MaltaPost post-box?



While results between the two categories are similar, a higher percentage of businesses from the main sample indicated ‘after 7pm and before 7am’ as the most convenient time (17% of the main sample as opposed to 8% of the booster sample). The highest percentage of Small to Large enterprises (38%) though, prefer to post letters between 5:30pm and 7:00pm. A similar preference (33%) is prevalent in the main sample.

## Awareness of Post Code – Small, Medium & Large Size Businesses (1)

Sample Size – 147



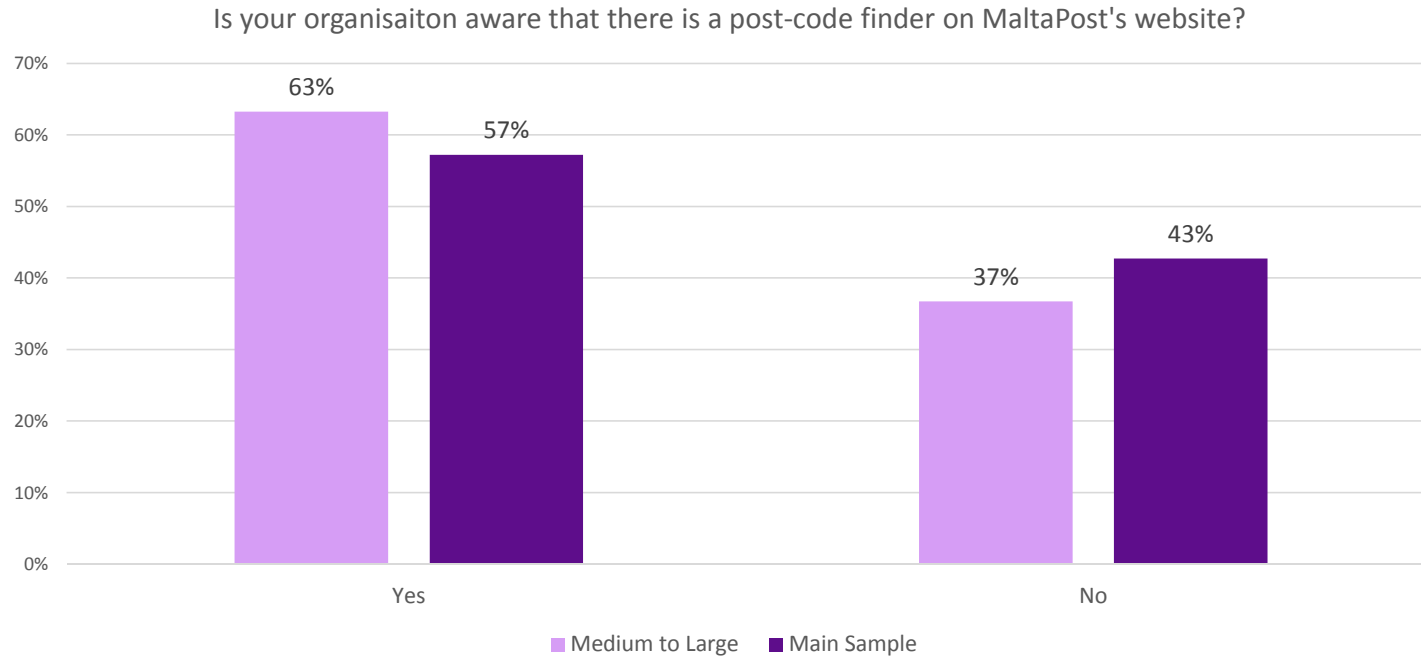
When reviewing whether or not organisations wrote the post-code when sending a letter no significant variances were observed when analysing data for small to large businesses as opposed to the main sample, though a slightly higher percentage of the small to large businesses (12%) indicated not to write the post code as opposed to 7% of the main sample.





## Awareness of Post Code – Small, Medium & Large Size Businesses (2)

Sample Size – 147

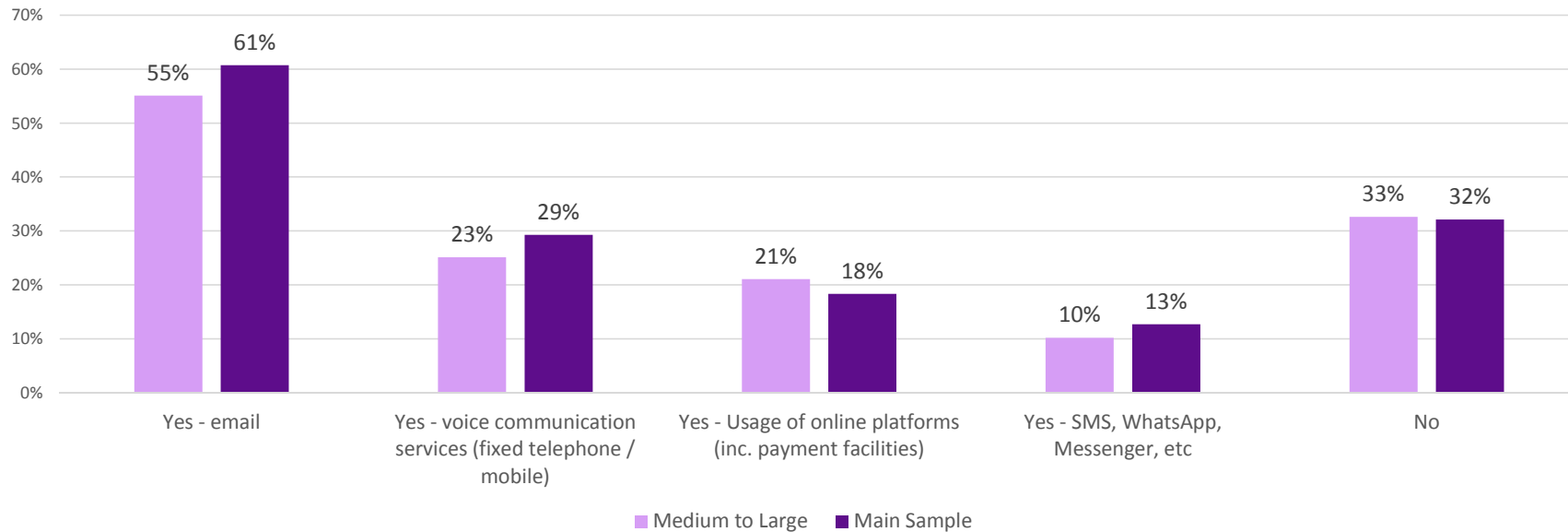




## Price Analysis: Substitution to Non-Postal Alternatives – Small, Medium & Large Size Businesses

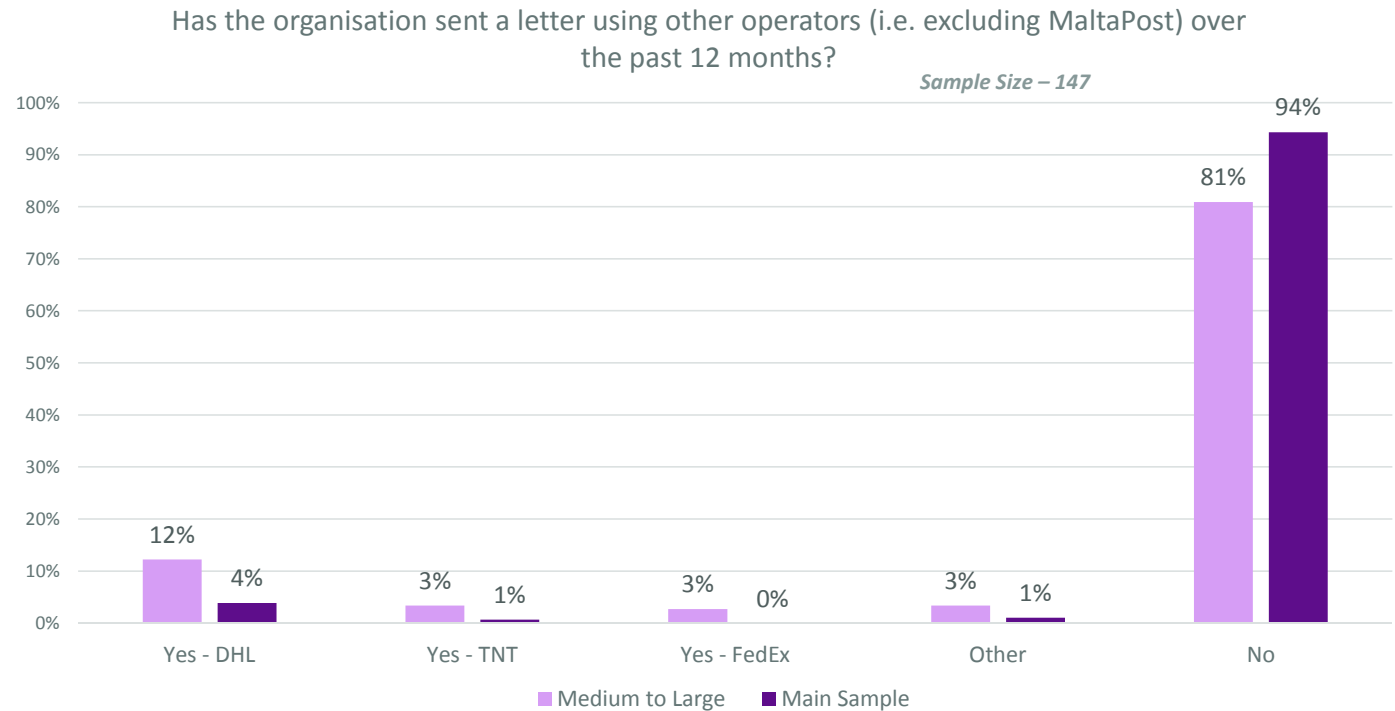
Sample Size – 147

If the price of a 50g addressed letter were to increase by 5-10% (e.g. from 26c to 29c) would your organisation consider switching to non-postal alternatives?



## Operators Used – Medium & Large Size Businesses (1)

The chart illustrates that the small to large enterprises were more inclined to send letters using operators other than MaltaPost (over the past 12 months). In this respect 12% of small to large enterprises indicated to have used DHL service as opposed to 4% of the main sample.

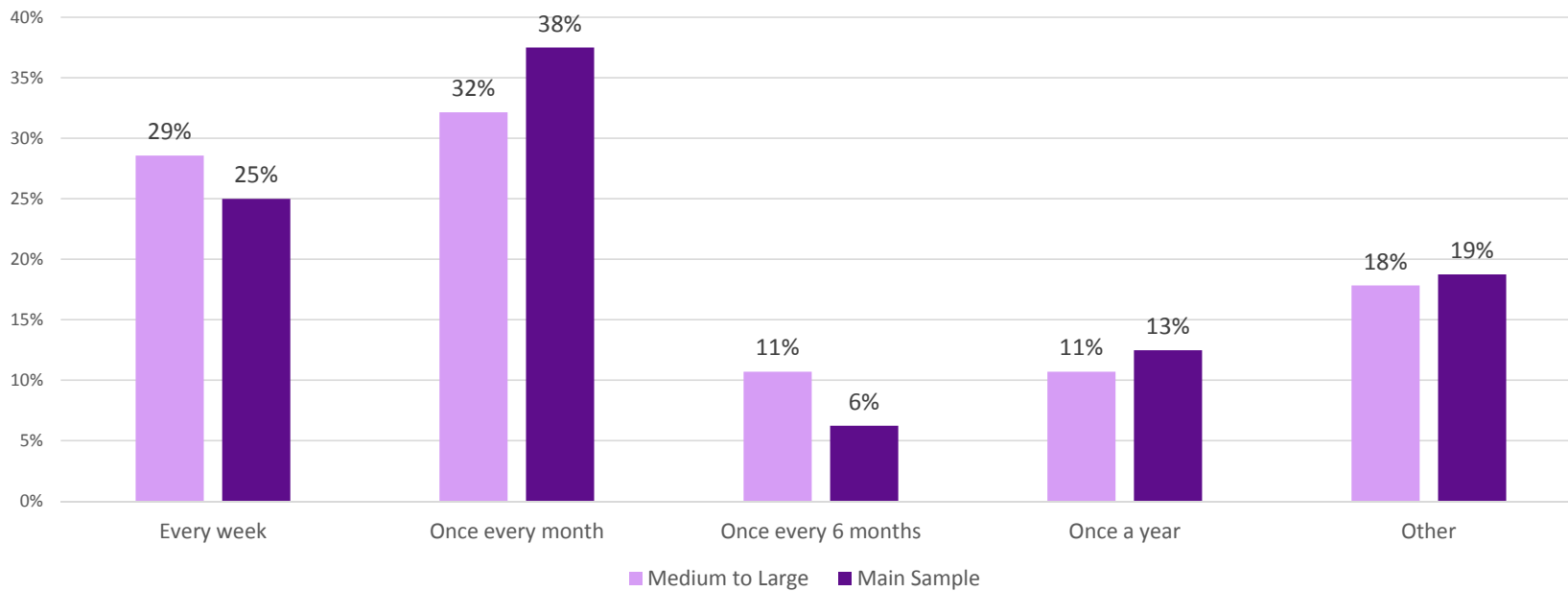




## Operators Used – Small, Medium & Large Size Businesses (2)

Sample Size – 28

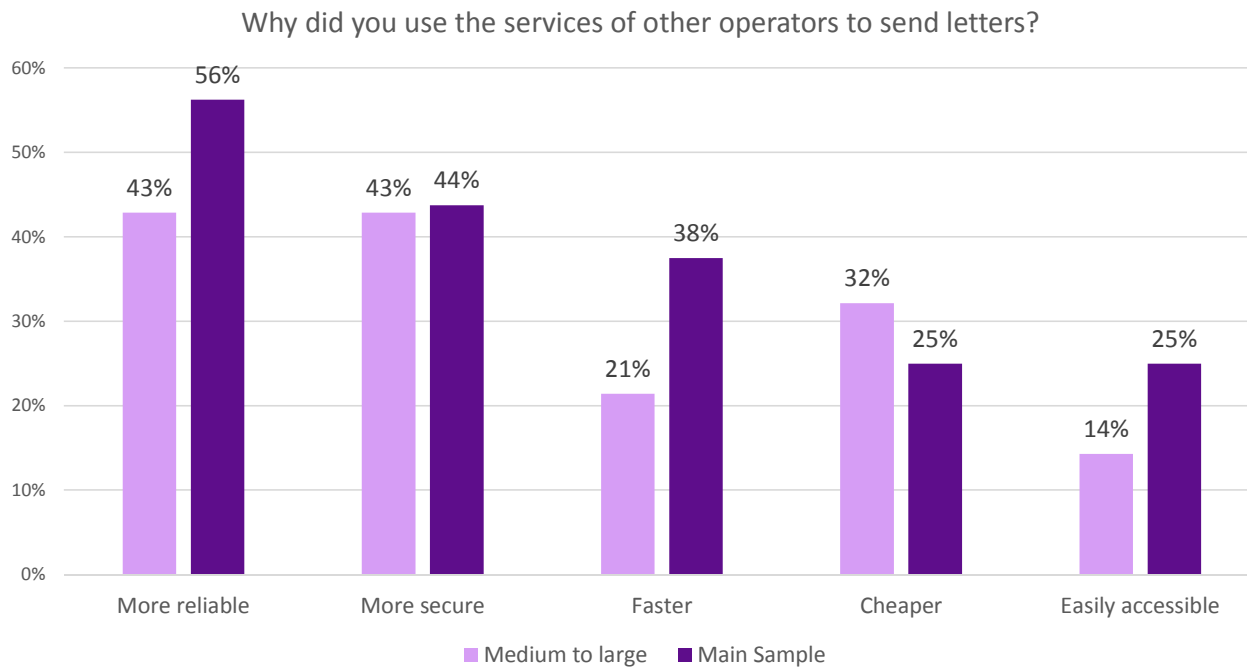
How often did the organisation send an addressed letter using other operators besides MaltaPost over the past 12 months?



## Operators Used – Small, Medium & Large Size Businesses (3)

Sample Size – 28

Multiple responses possible



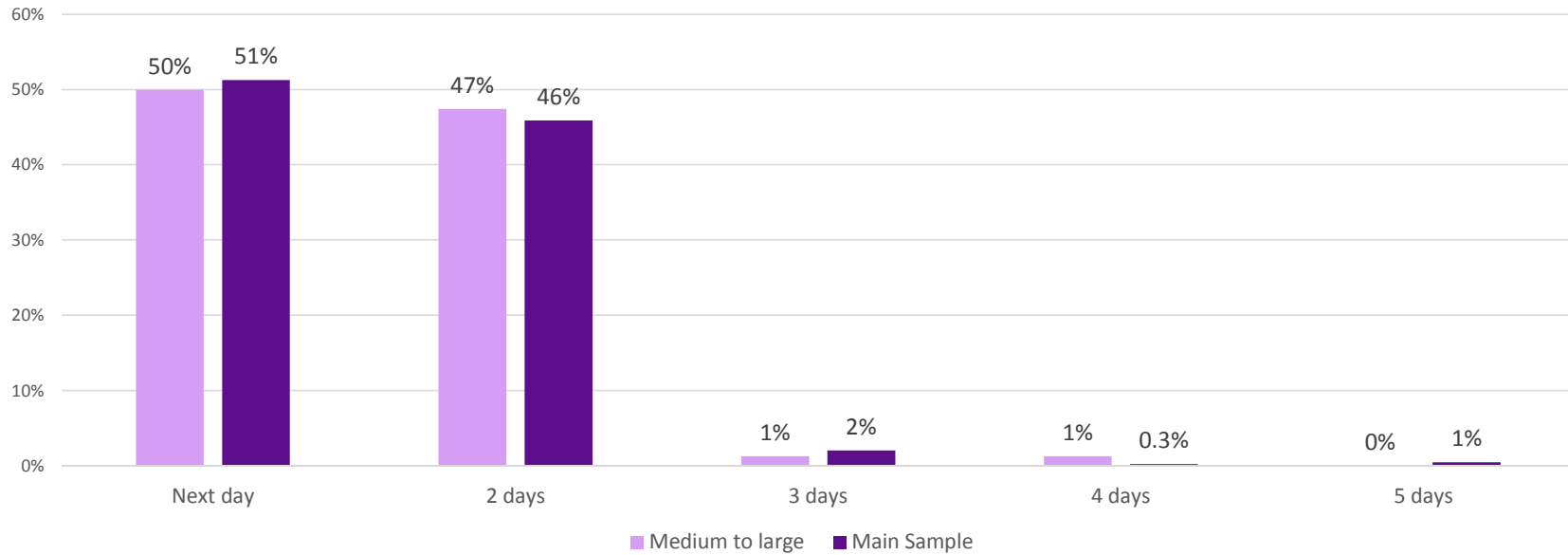
43% of small to large businesses indicated 'more reliable' and 'more secure' as the main reasons for them opting for other operators (than MaltaPost) to send letters. 'Cheaper' rated third with 32% responses.



## Collection & Delivery of Letters – Small, Medium & Large Size Businesses (1)

Sample Size – 156

What, in your opinion, is an acceptable lead-time (in days) from date of posting a letter to actual delivery?



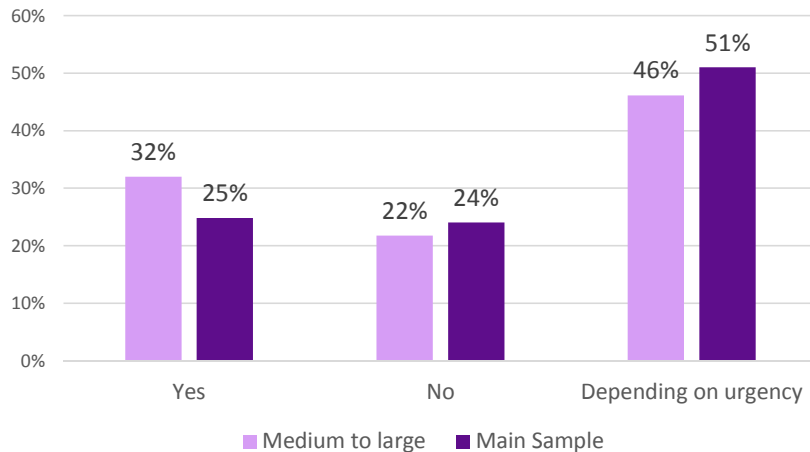


## Collection & Delivery of Letters – Small, Medium & Large Size Businesses (2)

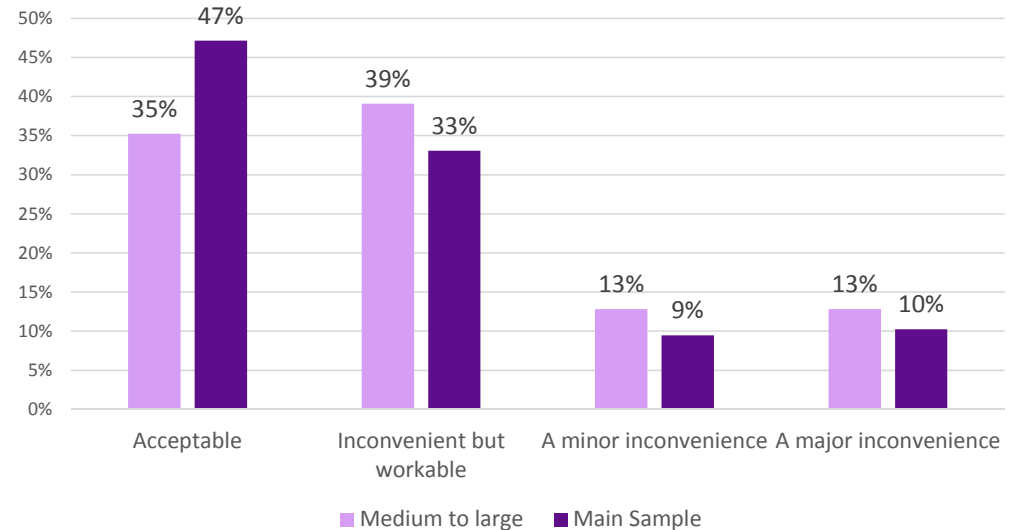
Sample Size – 156

Sample Size – 156

Would you prefer a postal service that is cheaper/discounted for deferred delivery, whereby your postal article is then delivered after 3 days instead of next day



If MaltaPost delivered mail 5 days a week, instead of 6, would your organisation find it to be:



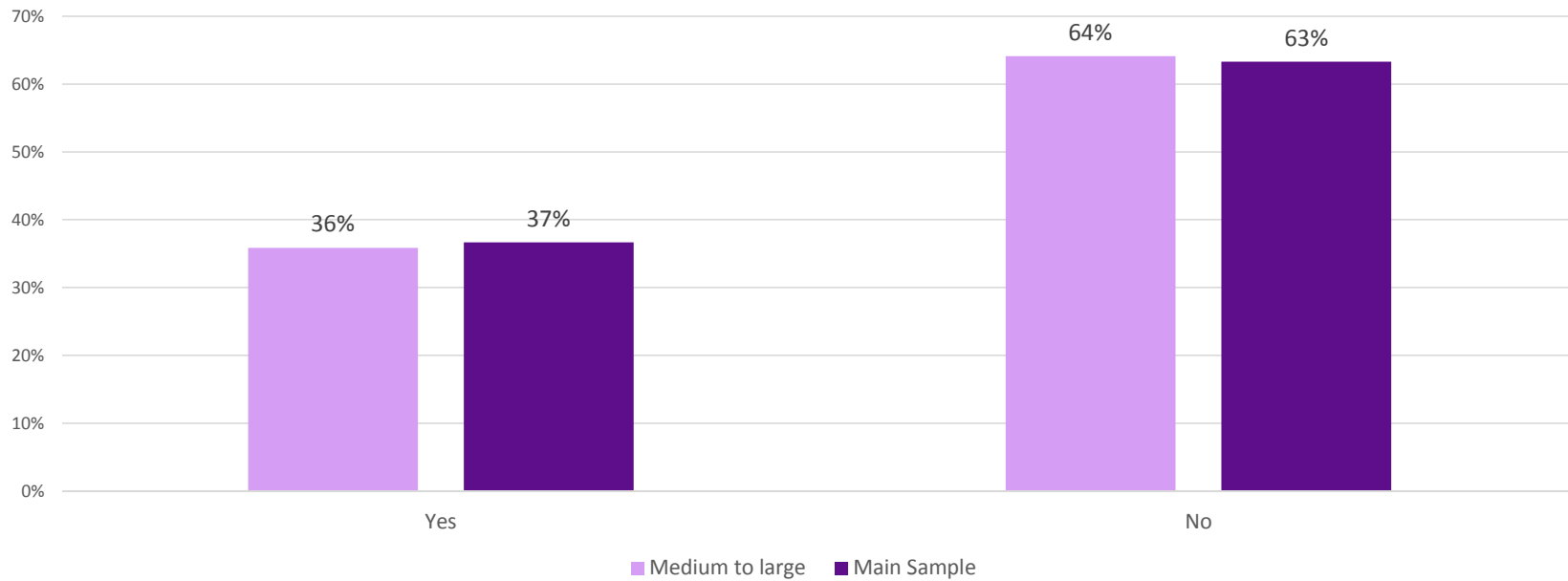
With 32% responses, small to large business are more inclined to prefer a cheaper / discounted and slower delivery service than the main sample. On the other hand , with 47% responses, the main sample is more inclined to accept a 5-day delivery service by MaltaPost instead of 6 than the small to large businesses (35%).



## Collection & Delivery of Letters –Small, Medium & Large Size Businesses (3)

Sample Size – 156

Would your organisation consider it reasonable if prices were to increase in order to maintain the current 6 day (Monday to Saturday) frequency of delivery?





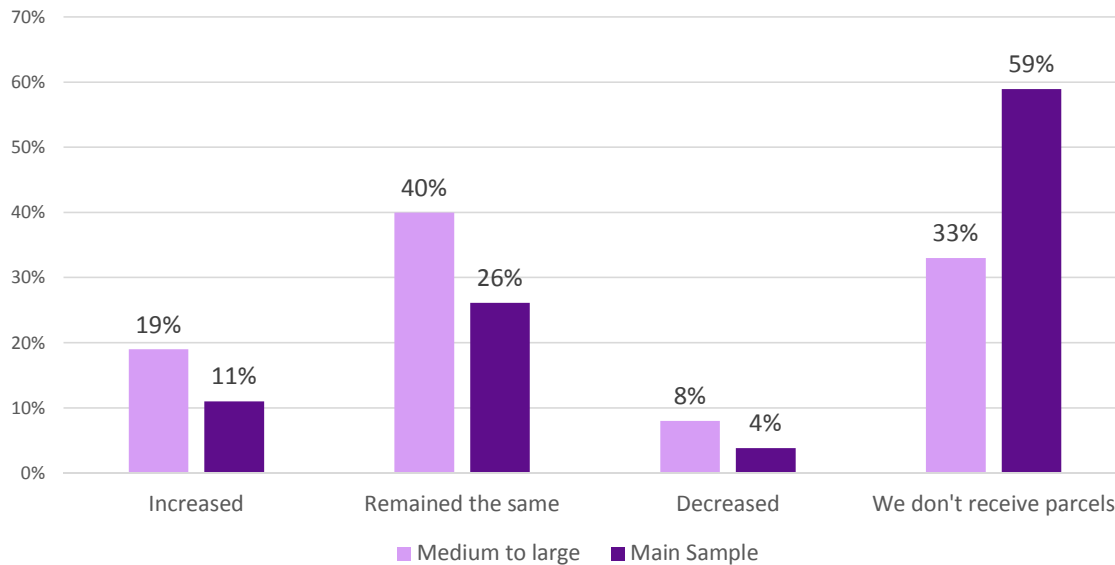
## **Section 3.3: Parcel Post**



## Delivery of Parcels – Small, Medium & Large Size Businesses (1)

Sample Size – 156

Can you tell me if the number of addressed parcels (not unaddressed / junk mail) **RECEIVED** by the organisation each week has increased, decreased or remained the same over the past twelve months



19% of small to large businesses indicated that the number of addressed parcels received by their organisation increased over the past 12 months. A slight increase over the main sample (11%). Likewise, the number of small to large size businesses that indicated that their number had decreased (8%) was above the main sample percentage (4%).

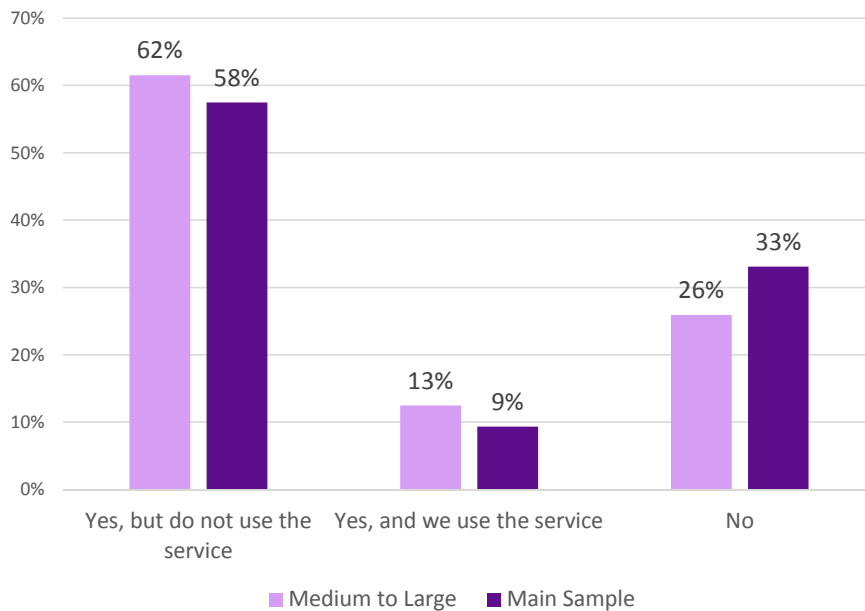
## Delivery of Parcels – Small, Medium & Large Size Businesses (3)

Sample Size – 104

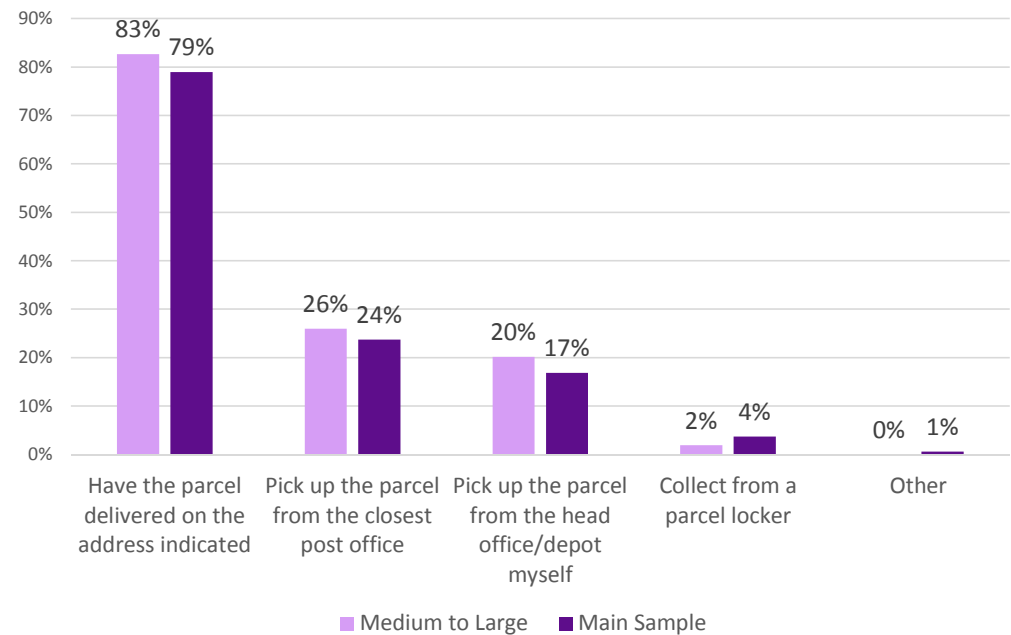
Multiple responses possible

Sample Size – 104

Is the organisation aware of the availability of parcel lockers in some parts of Malta?



How does your organisation prefer to receive parcels?



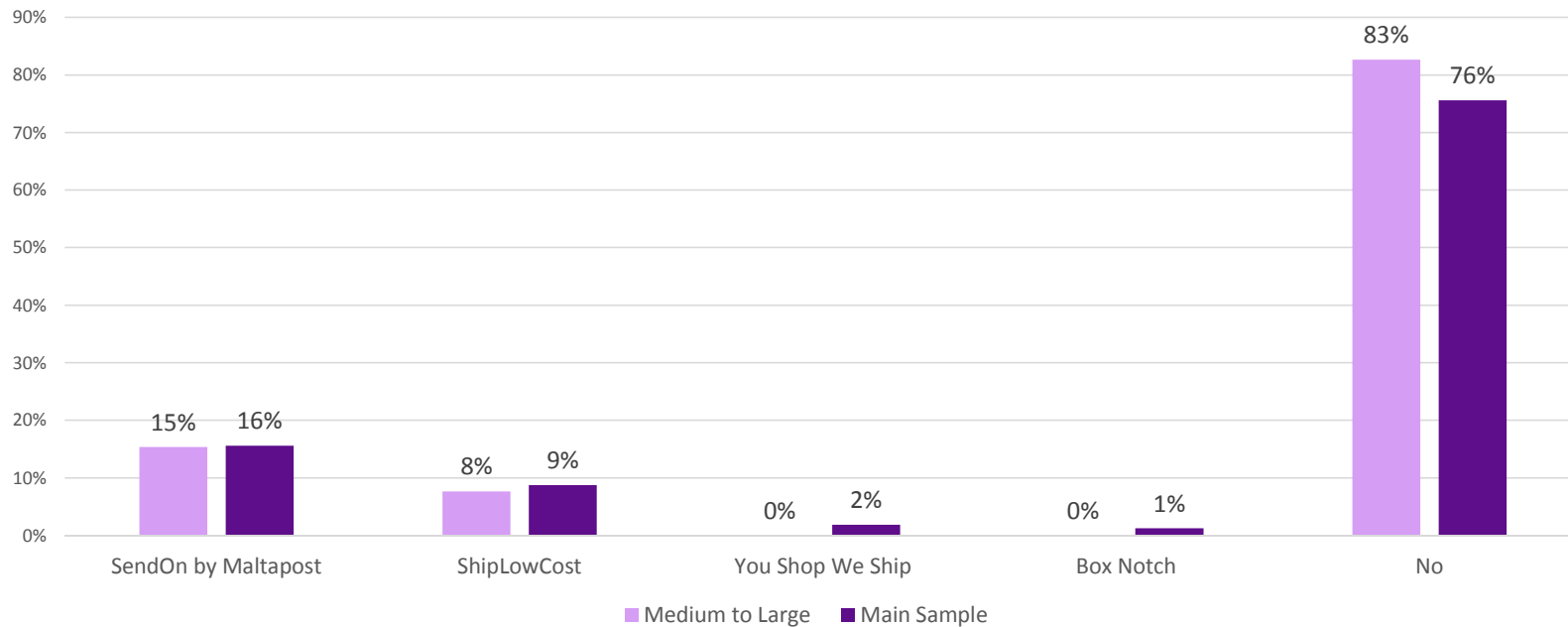


## MaltaPost's Parcel Service – Small, Medium & Large Size Businesses (1)

Sample Size – 104

In the last 12 months, has your organisation used any of the following 'postal article forwarding services' when purchasing online?

*Multiple responses possible*



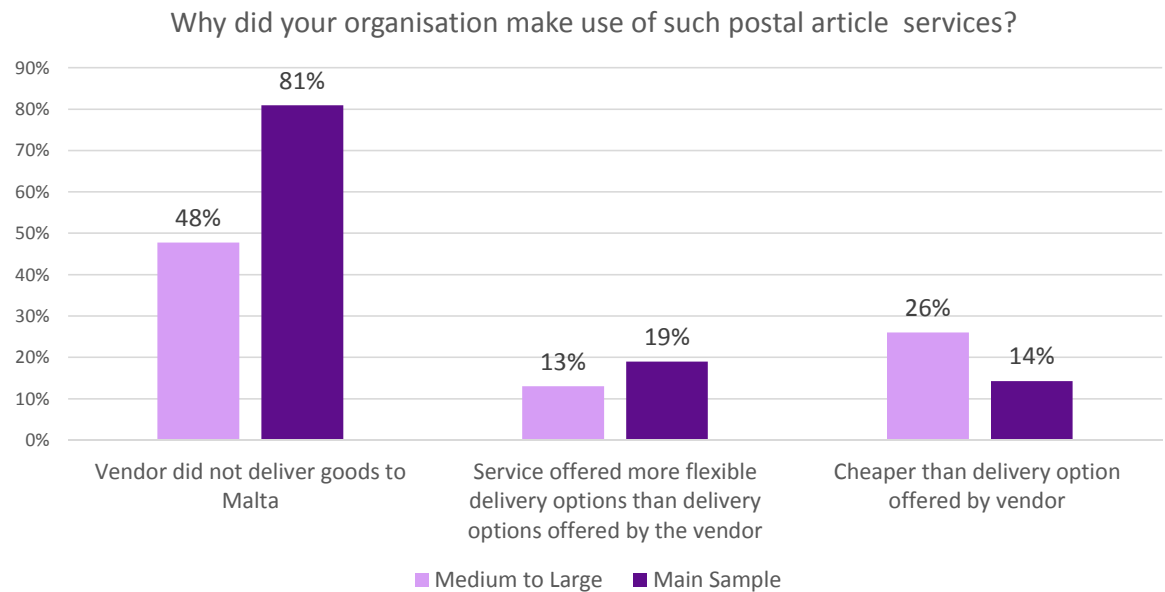


## MaltaPost's Parcel Service – Small, Medium & Large Size Businesses (2)

Sample Size – 23

Multiple responses possible

48% of small to large enterprises indicated that the 'vendor did not deliver goods to Malta' as the main reason why opted for postal article forwarding services .  
Among the main sample, this stood at 81%.

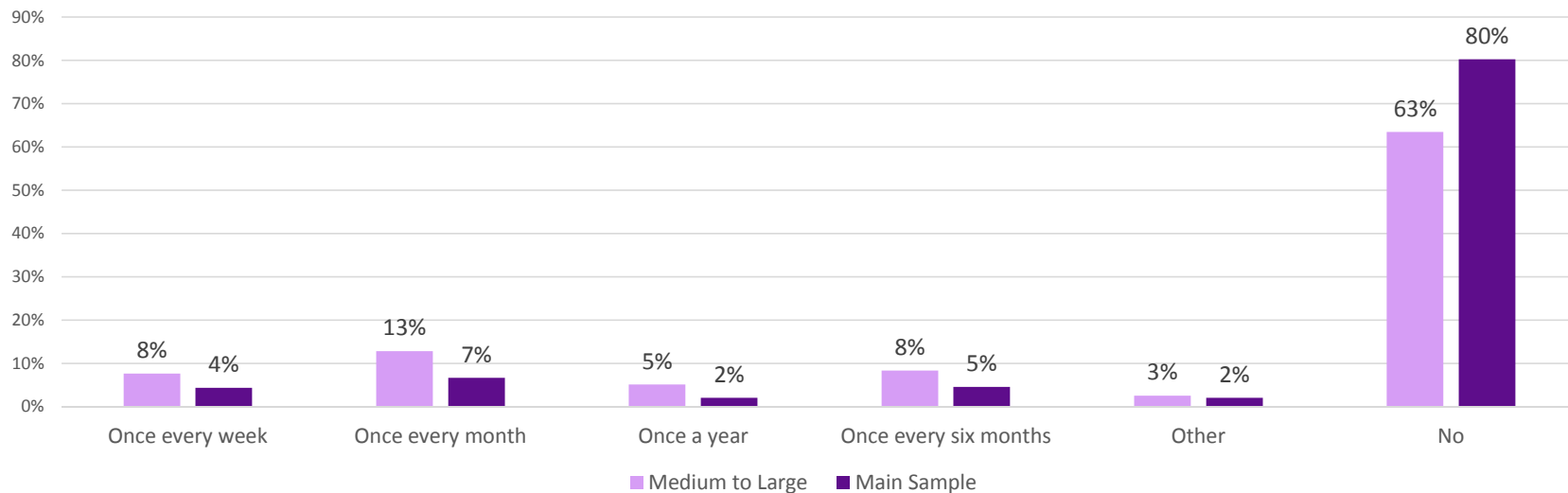




## MaltaPost's Parcel Service – Small, Medium & Large Size Businesses (3)

Sample Size – 156

Has your organisation sent a parcel using MaltaPost's service within the last 12 months?



A higher percentage of small to large businesses than microenterprises sent parcel using MaltaPost's service. (37% sent a parcel using MaltaPost's service than did businesses from the main sample (20%).

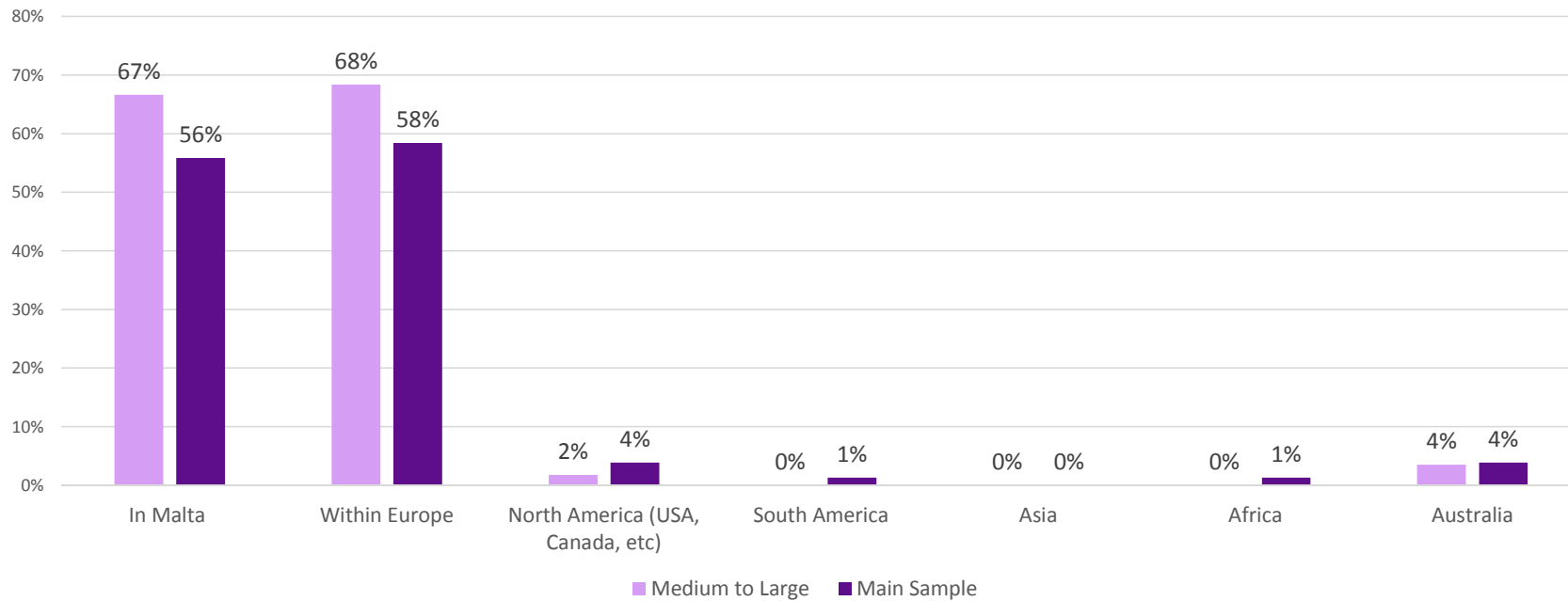


## MaltaPost's Parcel Service – Small, Medium & Large Size Businesses (4)

Sample Size – 57

Were the parcels sent through MaltaPost by the organisation during the past 12 months domestic (Malta - Malta) or were they sent to a foreign destination?

*Multiple responses possible*

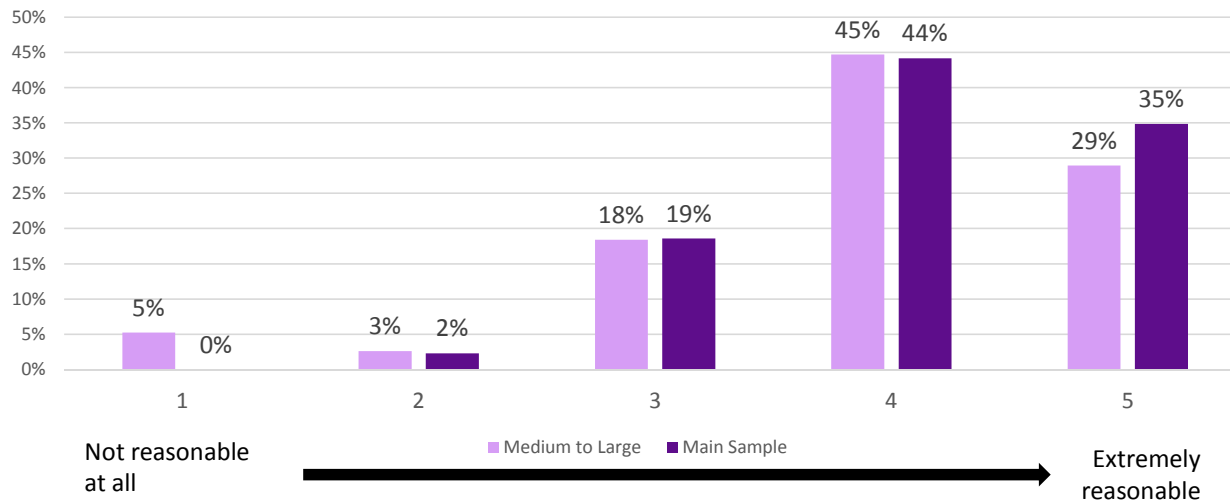




## MaltaPost's Parcel Service – Small, Medium & Large Size Businesses (5)

Sample Size – 38

How reasonable do you find the price of MaltaPost's domestic (Malta-to-Malta) parcel service?



74% of small to large businesses are satisfied with the price of MaltaPost's domestic parcel service, this being slightly lower than the main sample (79%).

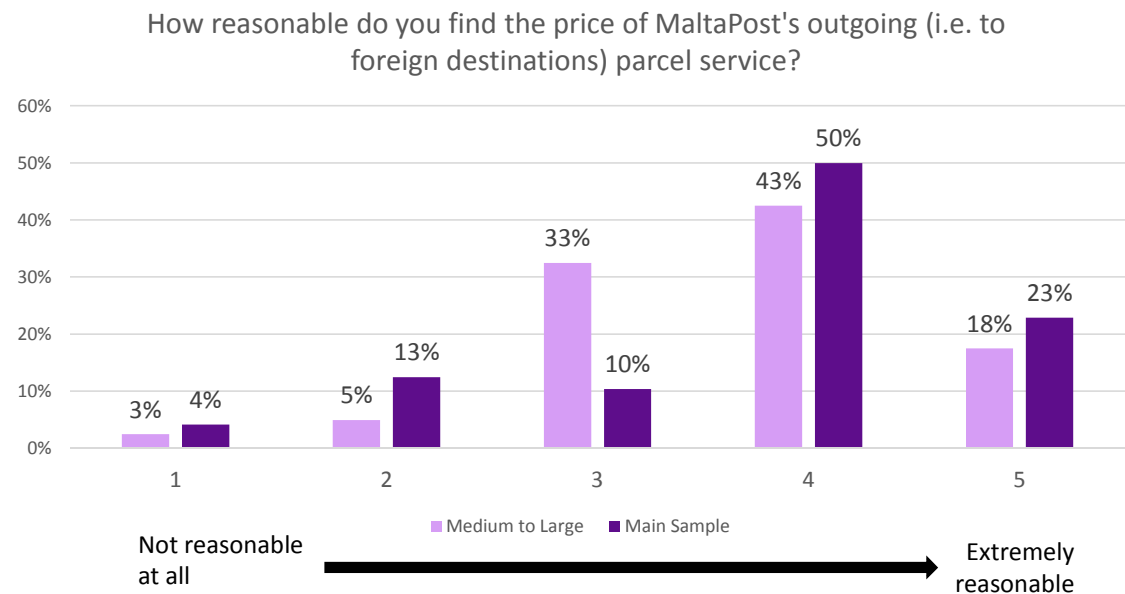




## MaltaPost's Parcel Service – Small, Medium & Large Size Businesses (6)

Sample Size – 40

61% of small to large enterprises are satisfied with the price of MaltaPost's outgoing parcel service. This percentage is slightly less than that of the main sample (73%). Furthermore, results indicate that small to large businesses are less satisfied with the price of MaltaPost's outgoing parcel service than they are with the domestic price.

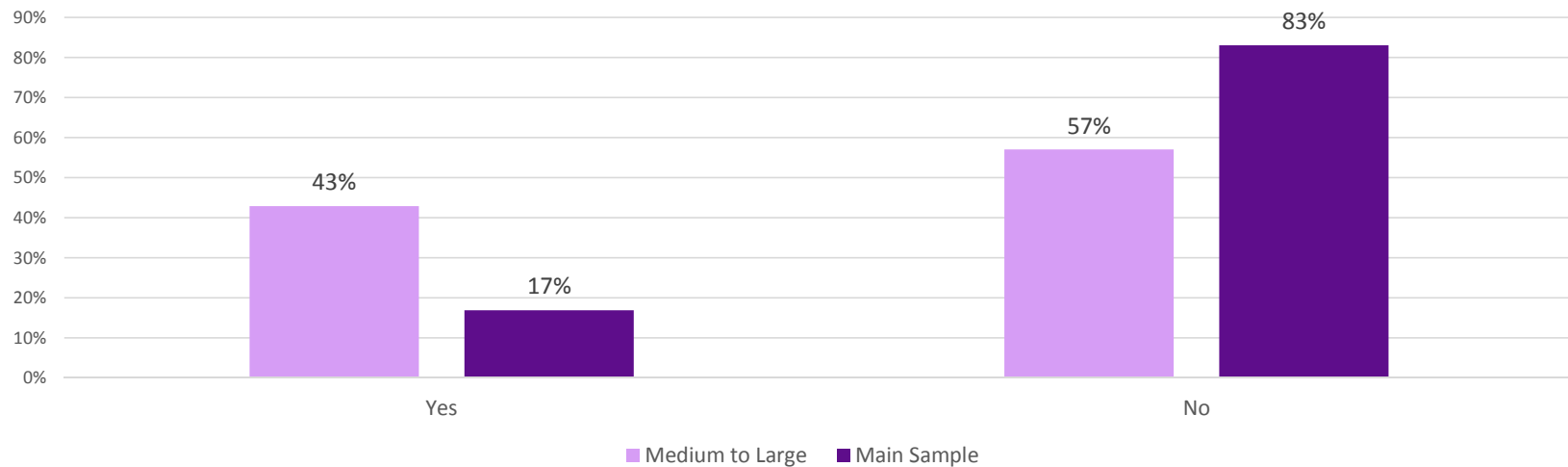




## Alternative Parcel Operators – Small, Medium & Large Size Businesses (1)

Sample Size – 156

Has the organisation sent a parcel using other operators (i.e. excluding MaltaPost) within the last 12 months?



43% of small to large businesses have sent a parcel using an operator other than MaltaPost's over the last 12 months. Such percentage is considerably larger than that of the main sample (17%).

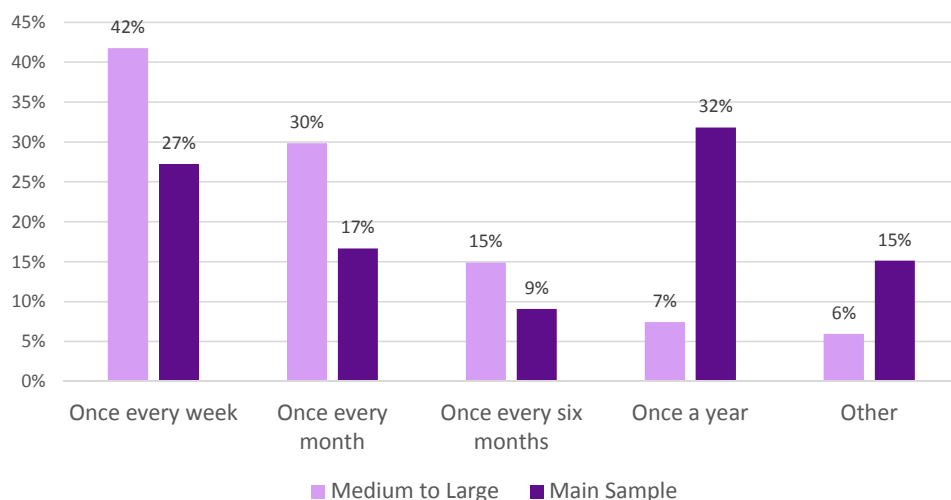
## Alternative Parcel Operators – Small, Medium & Large Size Businesses (2)

Sample Size – 67

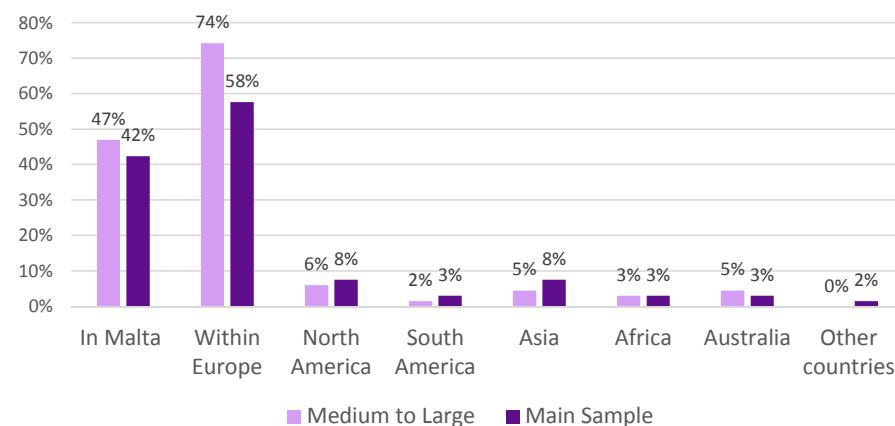
Sample Size – 67

Multiple responses possible

How often did the organisation send a parcel using other operators (excluding MaltaPost) within the last 12 months?



Were the parcels sent by the organisation using operators (other than MaltaPost) during the past 12 months domestic (Malta-Malta) or were they sent to another destination?



Small to large businesses sent parcels using operators other than MaltaPost more often than did the main sample, with 72% of this cluster indicating to do so once a month or more frequently as opposed to 44% of the main sample. Europe is the main destination were such parcels are sent to.

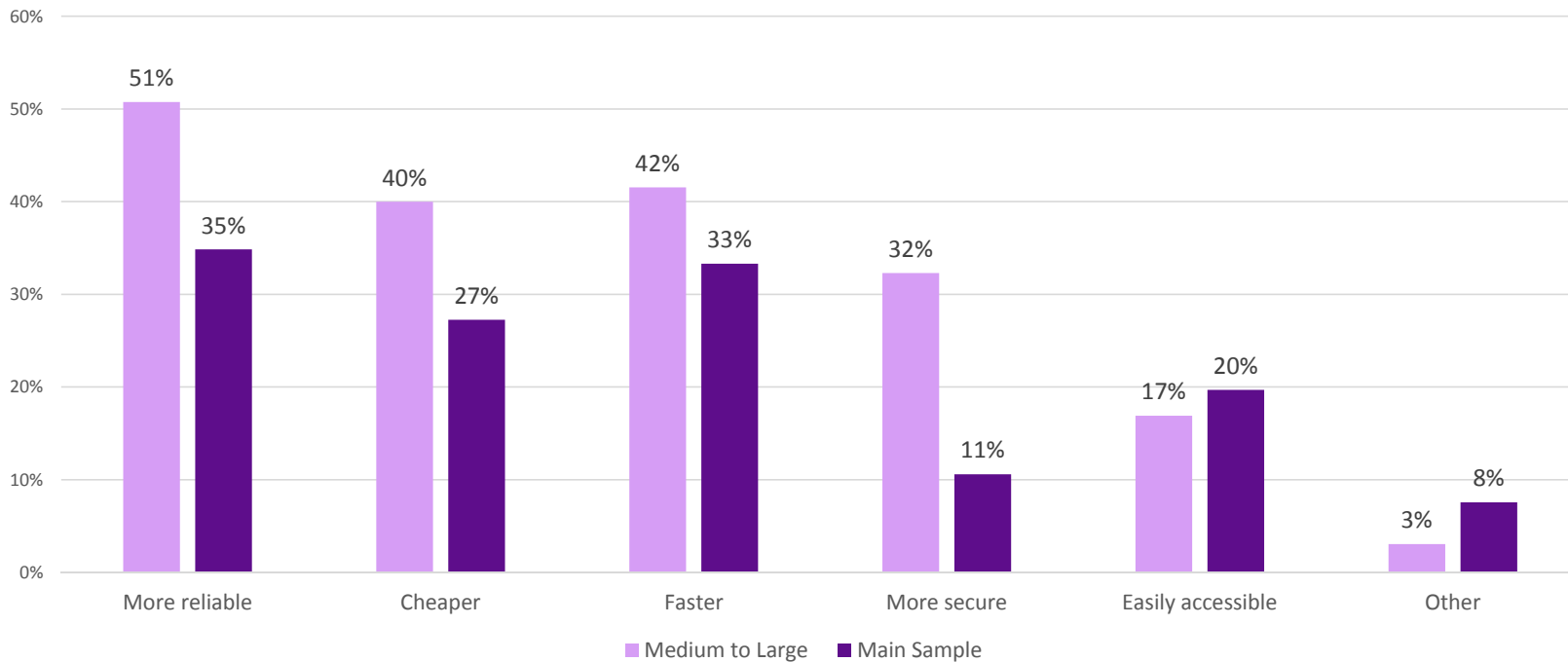


## Alternative Parcel Operators – Small, Medium & Large Size Businesses (3)

Sample Size – 67

Multiple responses possible

Why did you use the parcel post services of other operators?



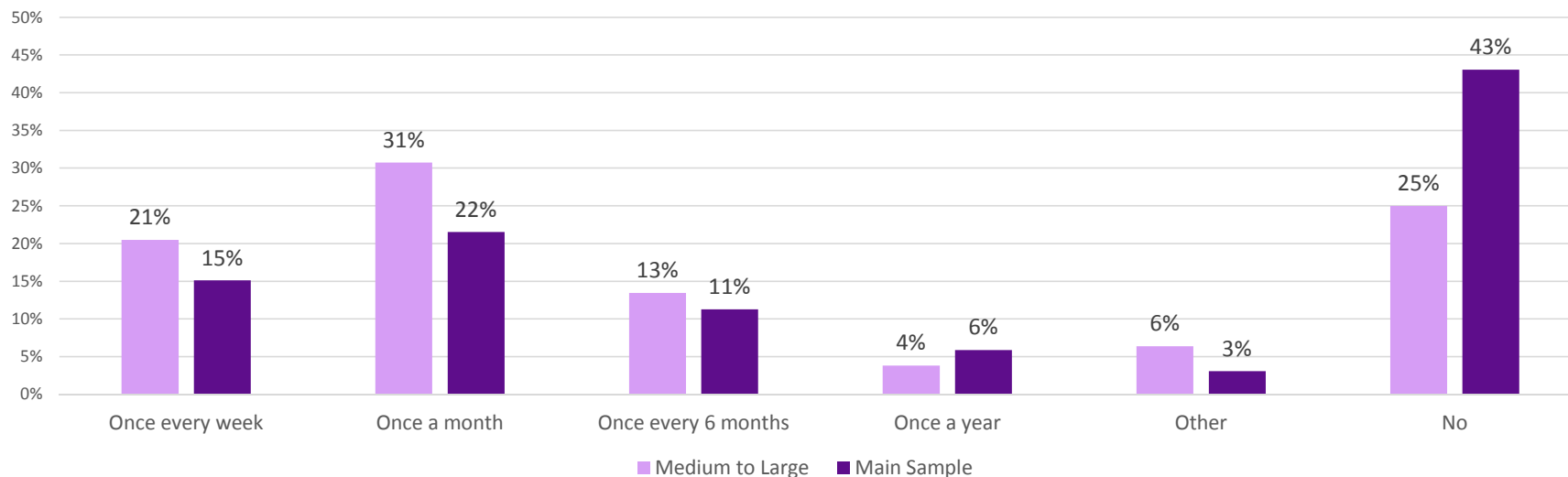
## **Section 3.4: Registered Mail**



## MaltaPost's Registered Mail Service – Small, Medium & Large Size Businesses (1)

Sample Size – 156

Has the organisation sent registered mail using MaltaPost over the past 12 months?



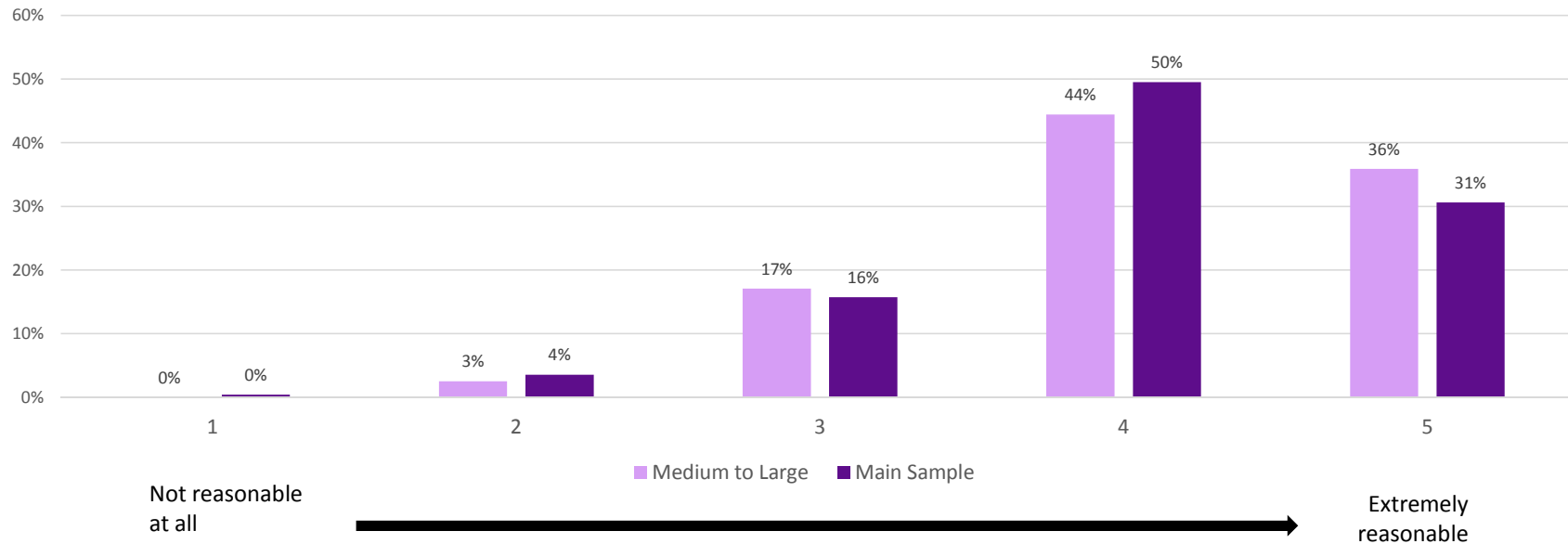
75% of the small to large businesses have sent a registered mail using MaltaPost over the past 12 months, as opposed to 57% of businesses falling within the main sample.



## MaltaPost's Registered Mail Service – Small, Medium & Large Size Businesses (12)

Sample Size (Booster sample) – 117

How do you find the price of MaltaPost's registered mail service?

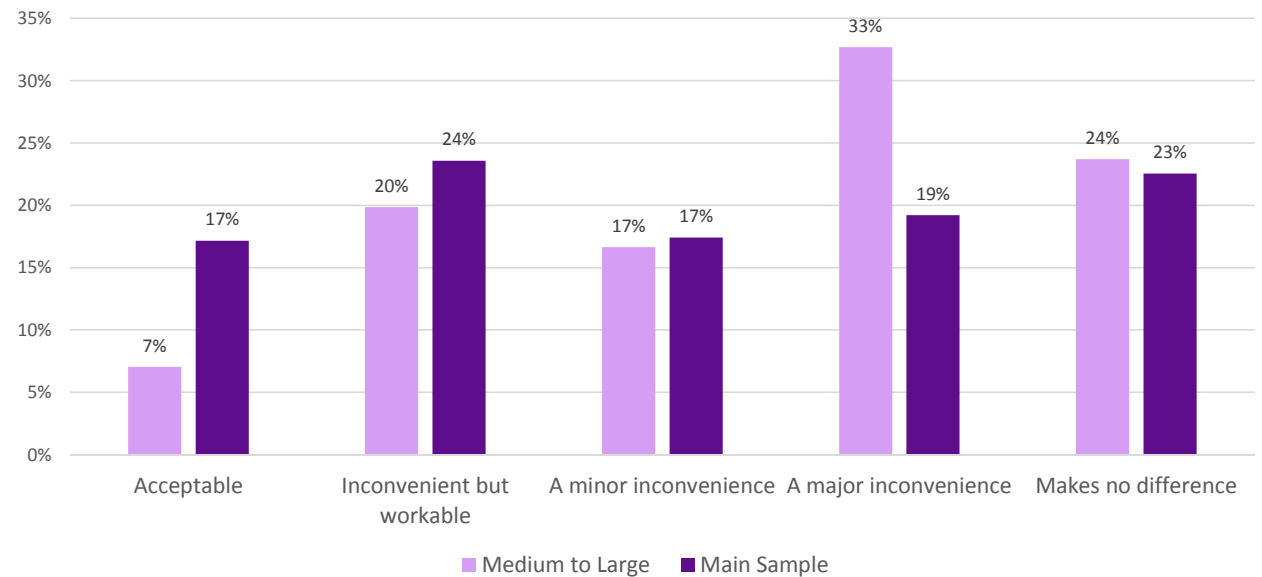




## MaltaPost's Registered Mail Service – Small, Medium & Large Size Businesses (3)

Sample Size – 156

If MaltaPost made one delivery attempt instead of two for delivering registered mail to your premises, would your organisation find it to be :



Small to large businesses are less likely to accept a one delivery attempt of registered mail by MaltaPost instead of two than microenterprises



## **Section 3.5:**

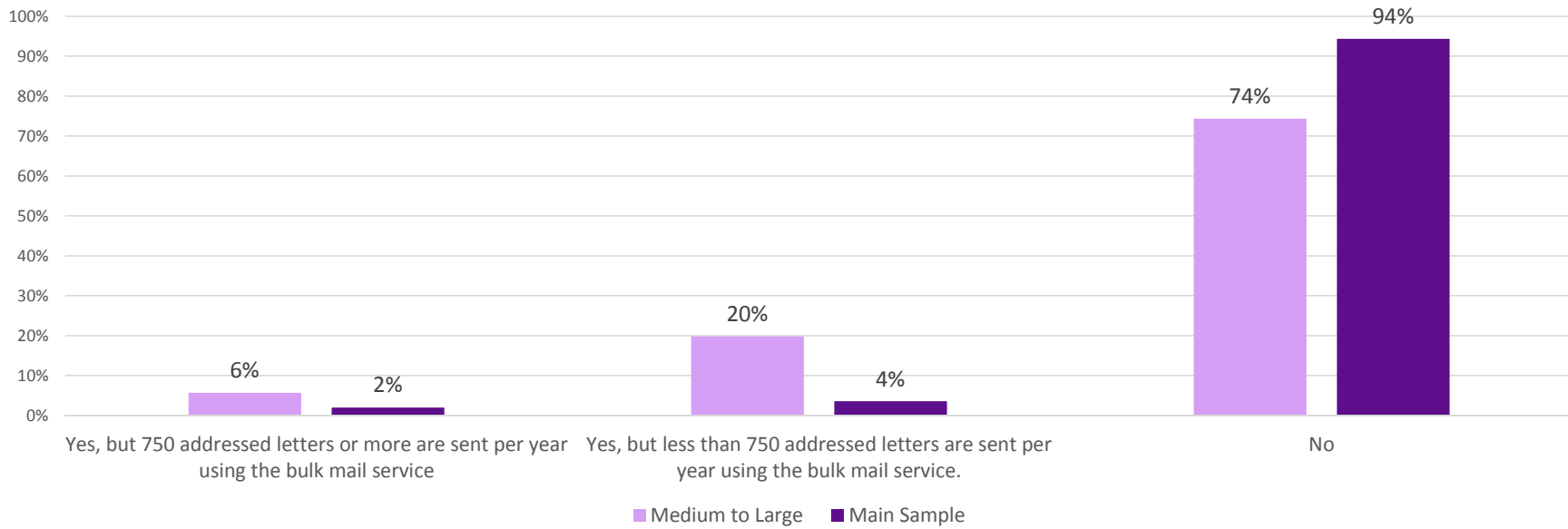
### **Bulk Mail**



## Bulk Mail – Small, Medium & Large Size Businesses (1)

Sample Size (Booster sample) – 156

Does your organisation make use of the bulk mail service provided by MaltaPost?



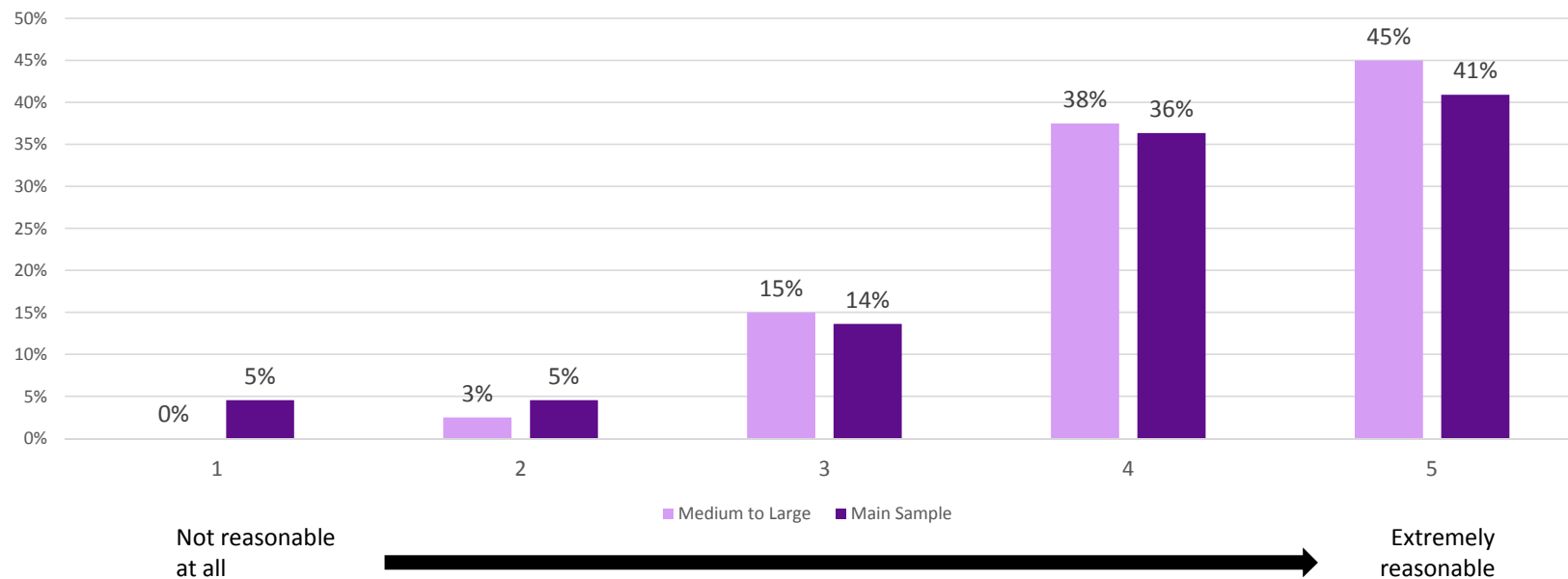
26% of small to large businesses make use of MaltaPost's bulk mail service, as opposed to 6% of the main sample.



## Bulk Mail – Small, Medium & Large Size Businesses (2)

Sample Size (Booster sample) – 40

How do you find the price of MaltaPost's bulk mail service



**Section 3.6:**  
**MaltaPost's Website and Offices Services**

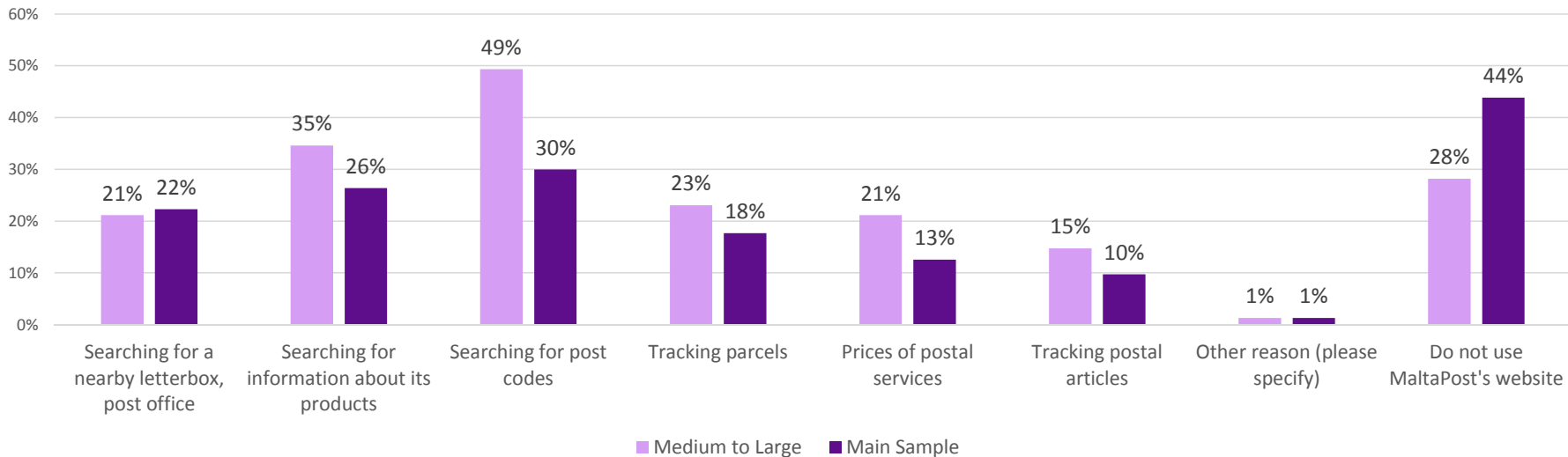


## MaltaPost's Website – Small, Medium & Large Size Businesses

Sample Size (Booster sample) – 156

Multiple responses possible

What are the main reasons for using MaltaPost's website?



28% of the small to large businesses indicated not to use MaltaPost's website, which percentage, is lower than that of the main sample (44%). The main reason mentioned for using the website being to search for post codes (49%).



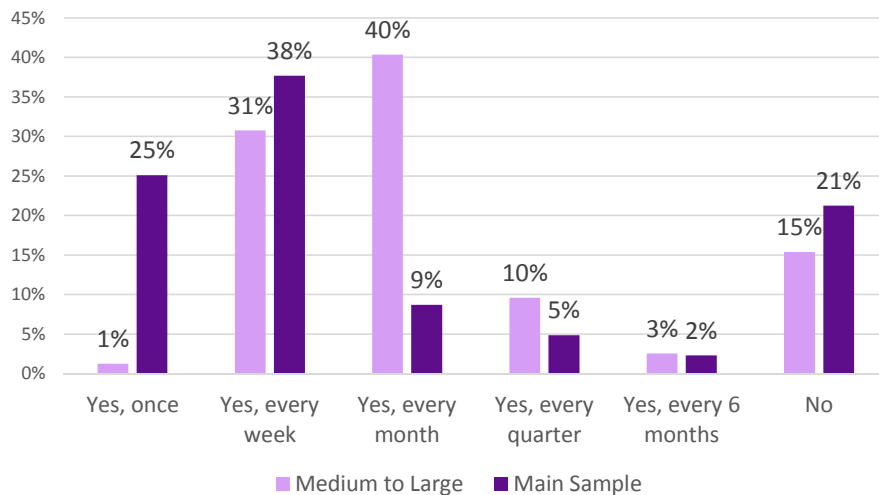
## Post Office Services – Small, Medium & Large Size Businesses (1)

Sample Size – 156

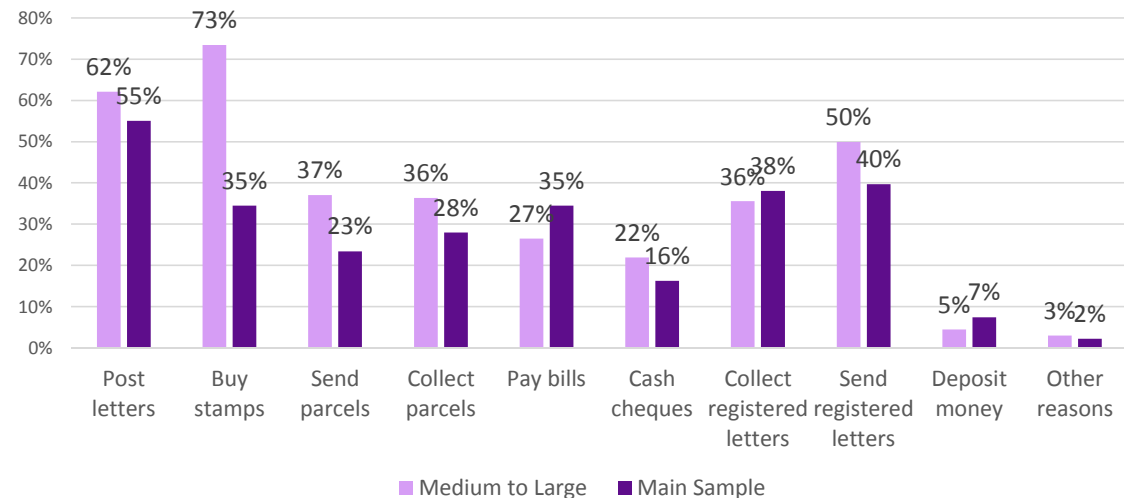
Sample Size – 132

Multiple responses possible

Has the organisation made use of the post office in the last 12 months?



Which services did the organisation make use of when visiting the postal office?



72% of both the small to large businesses and microenterprises make use of the post office once a month or more often.

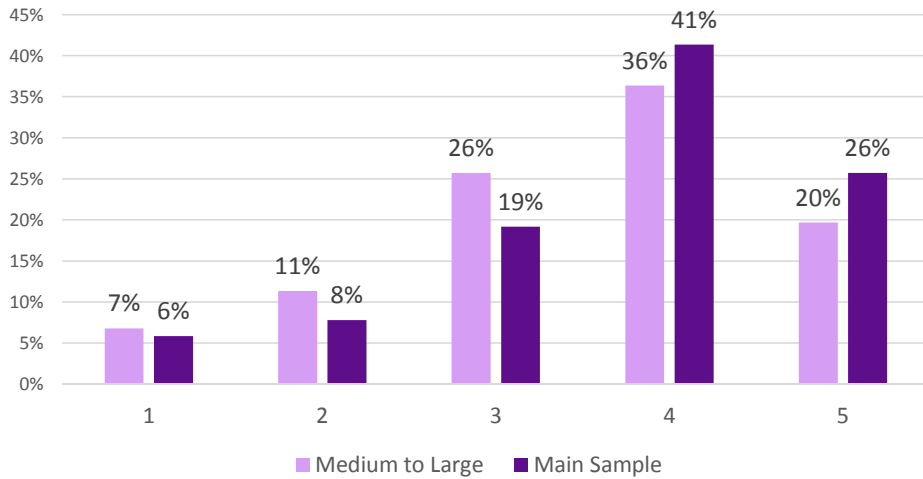


## Post Office Services – Small, Medium & Large Size Businesses (2)

Sample Size – 132

Sample Size – 14

How reasonable does the organisation find the waiting time at the post office?

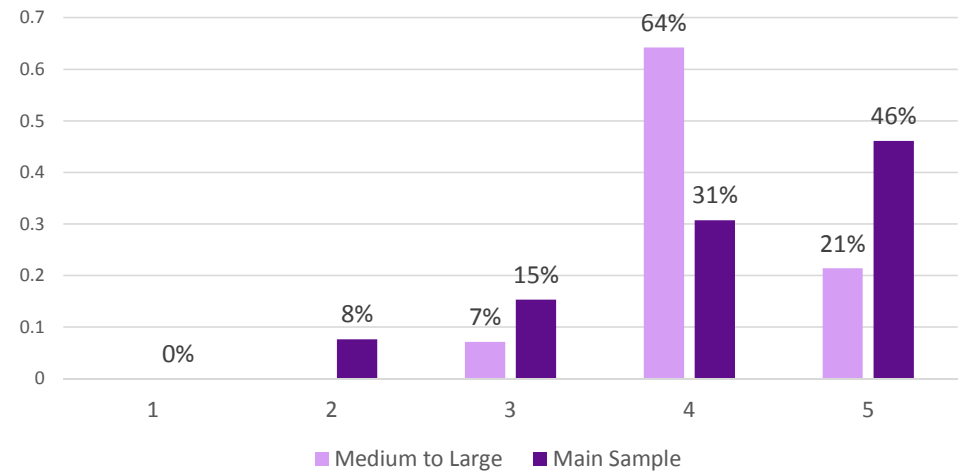


Not reasonable at all



Extremely reasonable

How useful does the organisation find the business reply service provided by MaltaPost?



Not useful at all



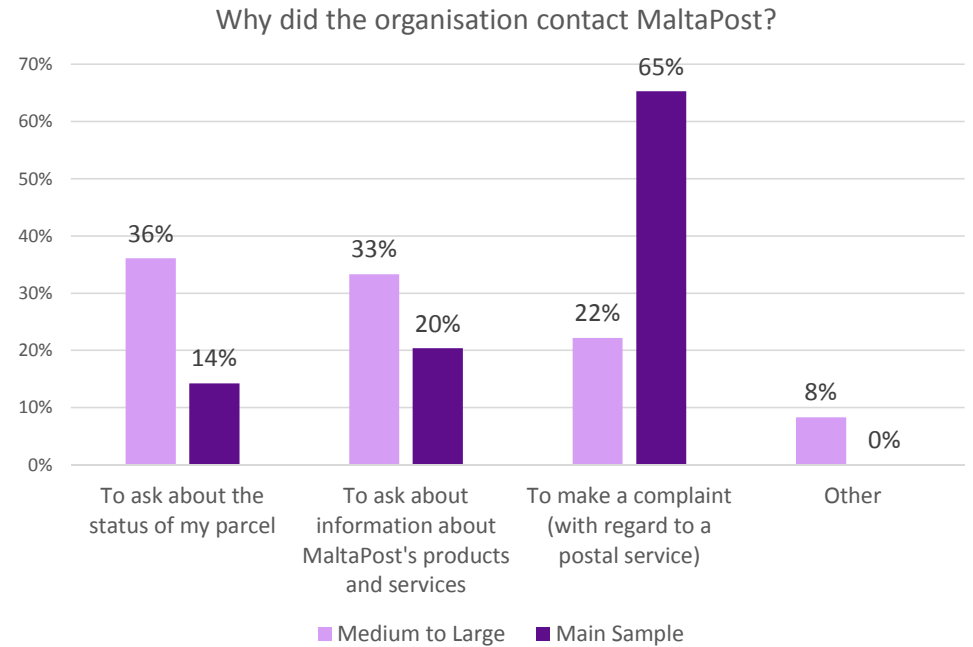
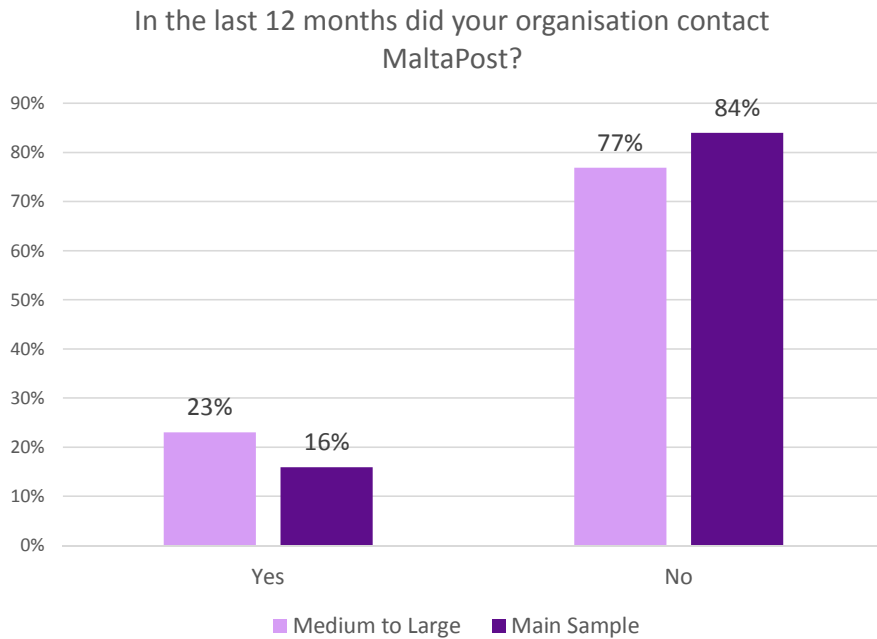
Extremely useful



## Contact & Complaint Issues – Small, Medium & Large Size Businesses (1)

Sample Size –156

Sample Size – 36





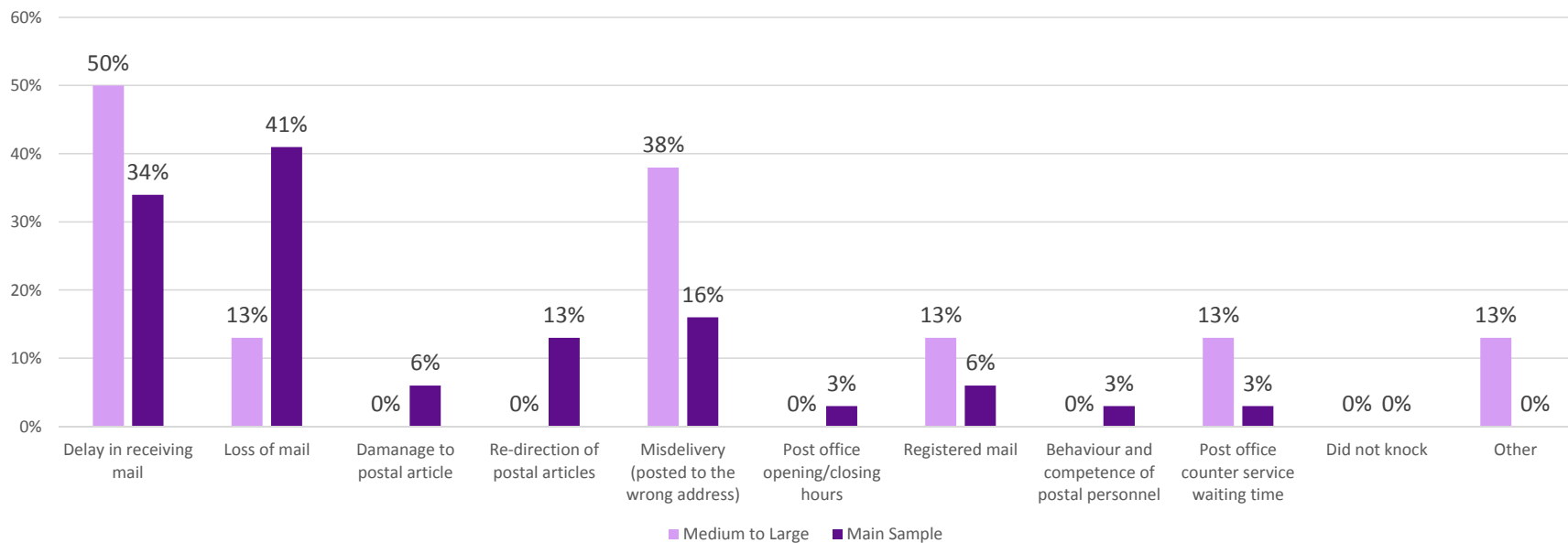


## Contact & Complaint Issues – Small, Medium & Large Size Businesses (2)

Sample Size (Booster sample) – 8

*Multiple responses possible*

What were the reasons for the organisation's complaint(s)?

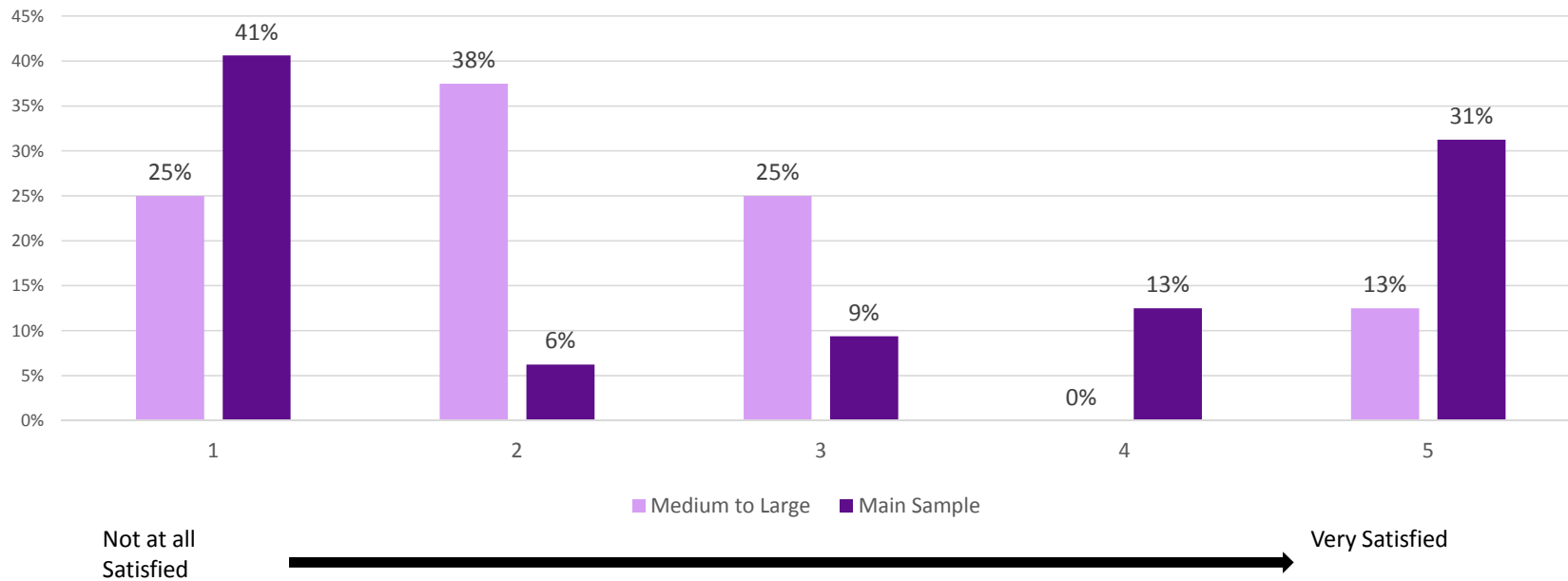




## Contact & Complaint Issues – Small, Medium & Large Size Businesses (3)

How satisfied was the organisation with the way the complaint was dealt with

Sample Size – 8

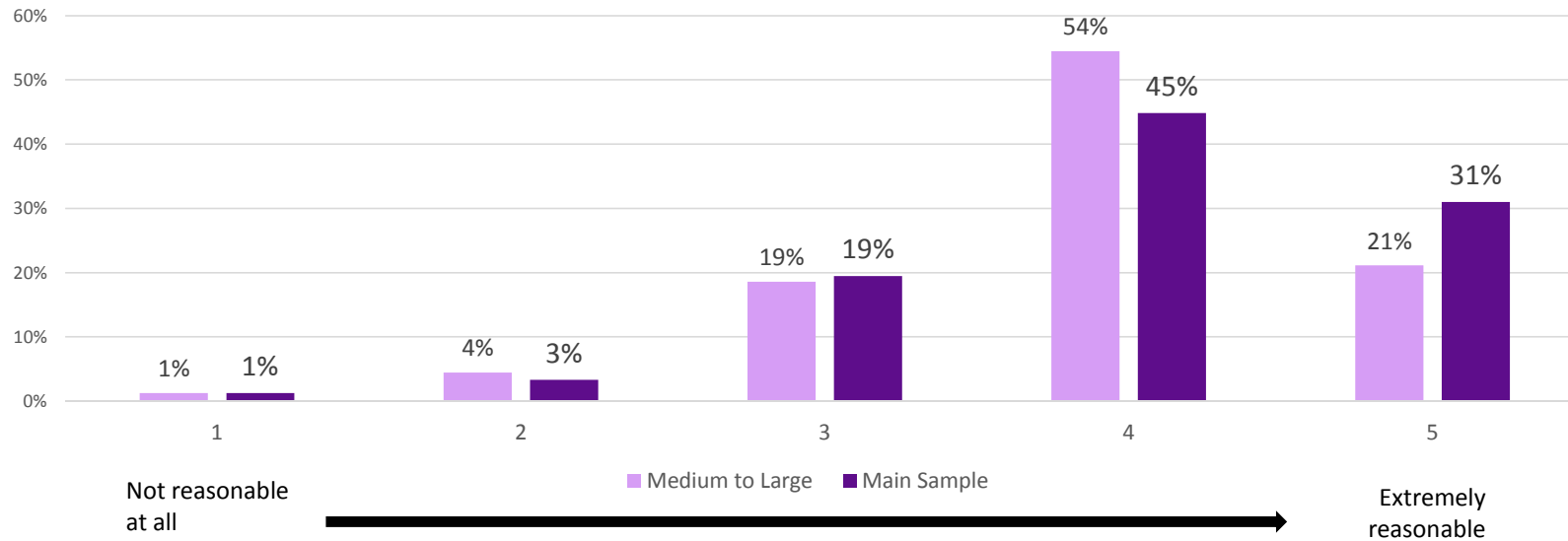




## Overall Satisfaction with MaltaPost's Services – Small, Medium & Large Size Businesses

Sample Size (Booster sample) – 156

What does the organisation think of the overall quality of postal services provided by MaltaPost?



Small to large businesses are well satisfied with the overall quality of postal service provided by MaltaPost (75%), - such percentage score is similar to that attained by the main sample.

## Highlights



## Main Highlights (1)

- The majority of respondents from both samples were unaware of their expenditure on postal services. Of those who did know larger businesses tended to spend within the higher brackets (24% claimed to have spent over €500) and smaller businesses spending within the lower brackets.
- 11% of respondents from the small and large business sample claimed to have sent more letters in the 12 months preceding the survey, citing the printing of bills for such increase (59%). The majority of respondents who claimed to have sent fewer letters within the same period mainly used email as a substitute (74%) but were more likely than their overall counterparts to invest in online payments (22%) eBusiness solutions (24%).
- Both samples were asked which non-postal alternatives they would adopt in the case of a 5-10% price increase. The majority of small, medium and large businesses, like respondents from the overall sample, would switch to email (55% and 61% respectively).



## Main Highlights (2)

- When compared to smaller businesses large businesses showed similar openness towards the idea of a 2-day lead-time, whereby a letter is delivered 2 days after it is posted (as opposed to the current D+1 delivery service offered by MaltaPost).
- Larger businesses were more likely to visit MaltaPost's website than respondents from the overall sample and were also likely to visit more frequently. Respondents from both samples mainly visited the website to search for post-codes and information about prices.
- While the majority of both samples visited the post office larger businesses were more likely to make use of services related to buying of stamps, sending and receiving parcels than respondents from the overall sample. Smaller businesses, on the other hand, were more likely than larger businesses to visit the post office to pay bills.



**Malta Communications Authority**  
Valletta Waterfront, Pinto Wharf,  
Floriana, FRN 1913, Malta

**T** + 356 2133 6840  
**F** + 356 2133 6846

**E** [info@mca.org.mt](mailto:info@mca.org.mt)  
**W** [www.mca.org.mt](http://www.mca.org.mt)