



MCA Postal Perceptions Survey – Bulk Mailers

Main survey findings based on perceptions

18th April 2022

Purpose

- The MCA Postal Perception Survey amongst 'Bulk Mailers' is carried out every two years to get insight on the preferences of local businesses who utilise MaltaPost's bulk mail services.
- The bulk mail service is offered to companies who have 50 or more items of the same size, weight and format to be posted. It consists of the operator aiding in the processing of the post, affixing postage stamps, and generally offering an efficient service of how this mail is delivered.
- MaltaPost is the only operator who offers this service in Malta. MaltaPost is also the designated universal service provider, responsible to provide these universal services which incorporate both the clearance and distribution of letters and packages.
- The aim of this survey is to assess the quality of the service being provided, including the duration of delivery of post and ensuring the affordability of the postal service.

EMCS Ltd carried out the survey between October and December 2021 on behalf of the MCA

Fieldwork

- Interviews were carried out by video call lasting around 15 minutes.
- The survey respondents were chosen randomly from a number of business directories.
- Respondents were all involved in the responsibility of 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.

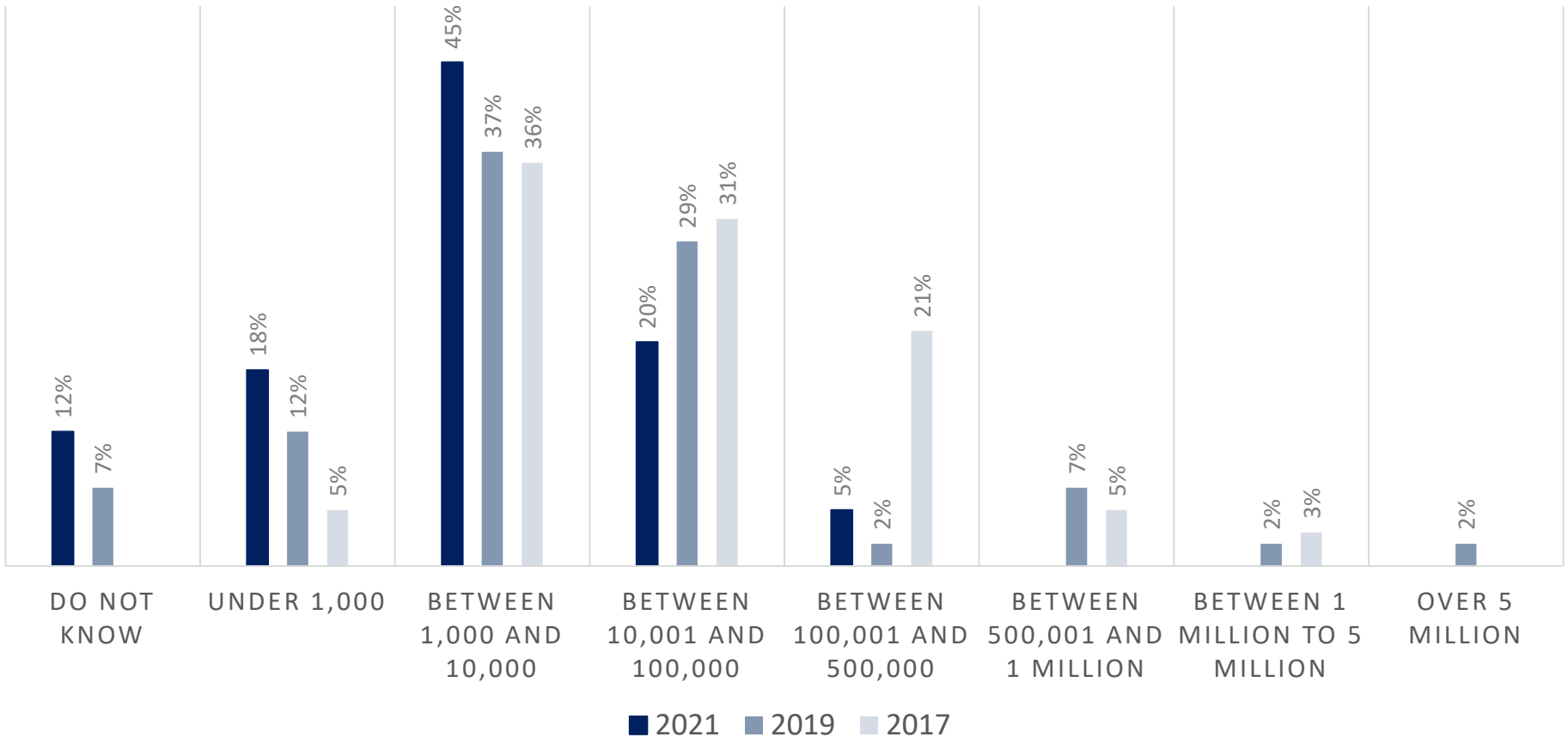
Responses

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

Bulk mail items sent per year

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

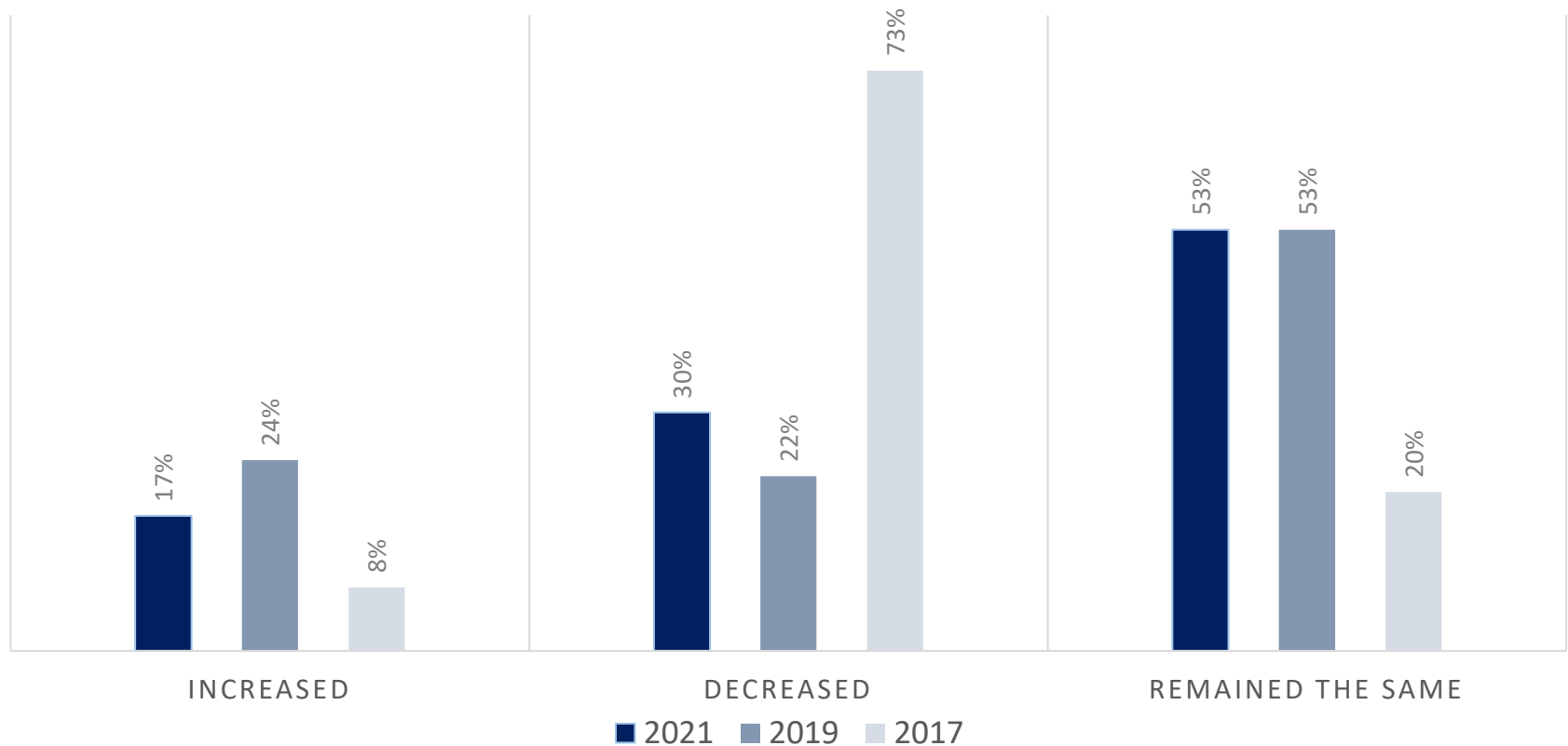
45% of bulk mailers sent between 1,000 and 10,000 addressed letters per year using the bulk mail service over the past 12 months.



Mail sent

Number of Respondents: 40 (2021), 41 (2019), 40 (2017)

Similar to 2019, 53% of the respondents claimed that the number of addressed letters sent by the organisation in the last 12 months remained the same.

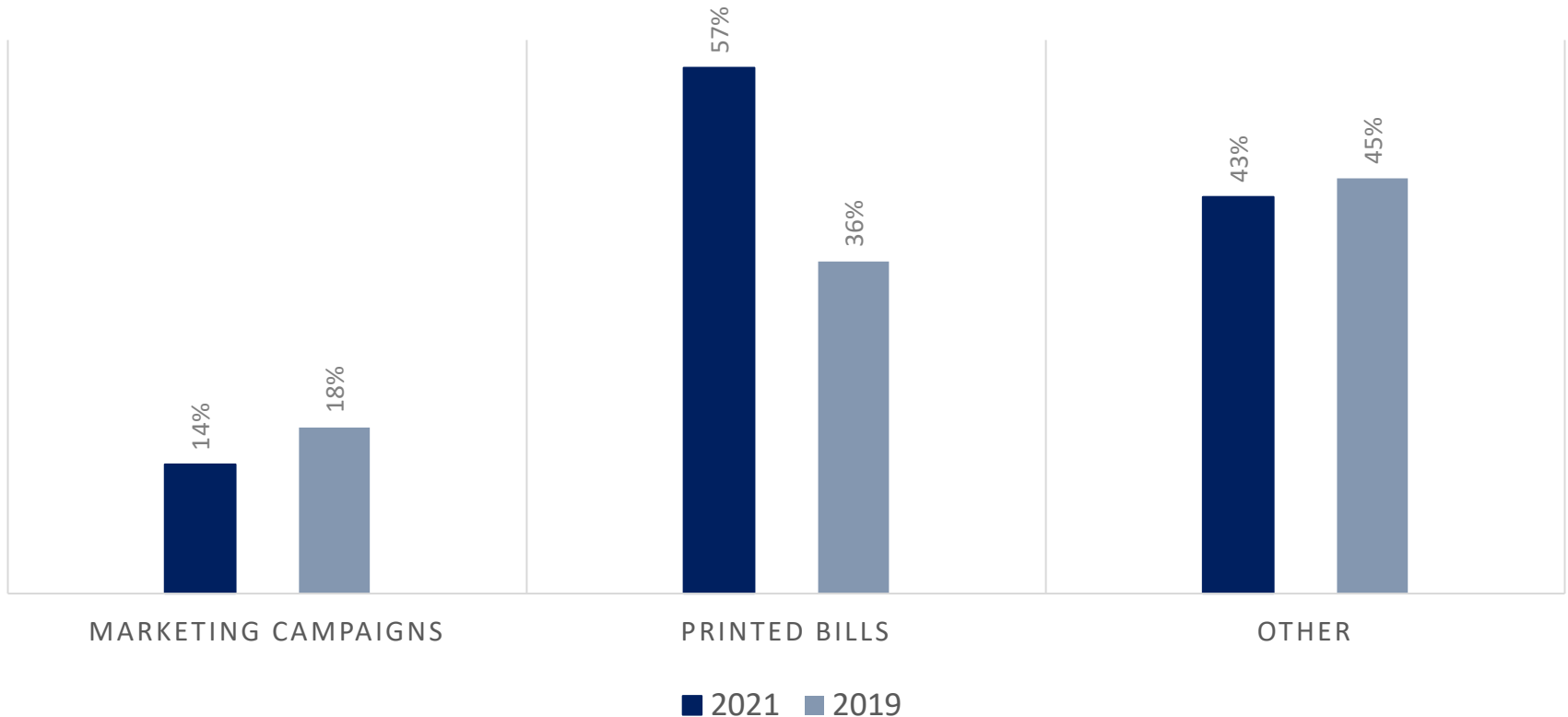


Reasons for increase in mail sent

Number of respondents: 7 (2021) / 10 (2019)

(Question was asked to those who answered 'increase' in previous slide. Respondents could give multiple responses.)

4 out of the 7 bulk mailers who claimed an increase in the number of addressed letters sent by the organisation in bulk, indicated 'printed bills' as the main reason for increase.

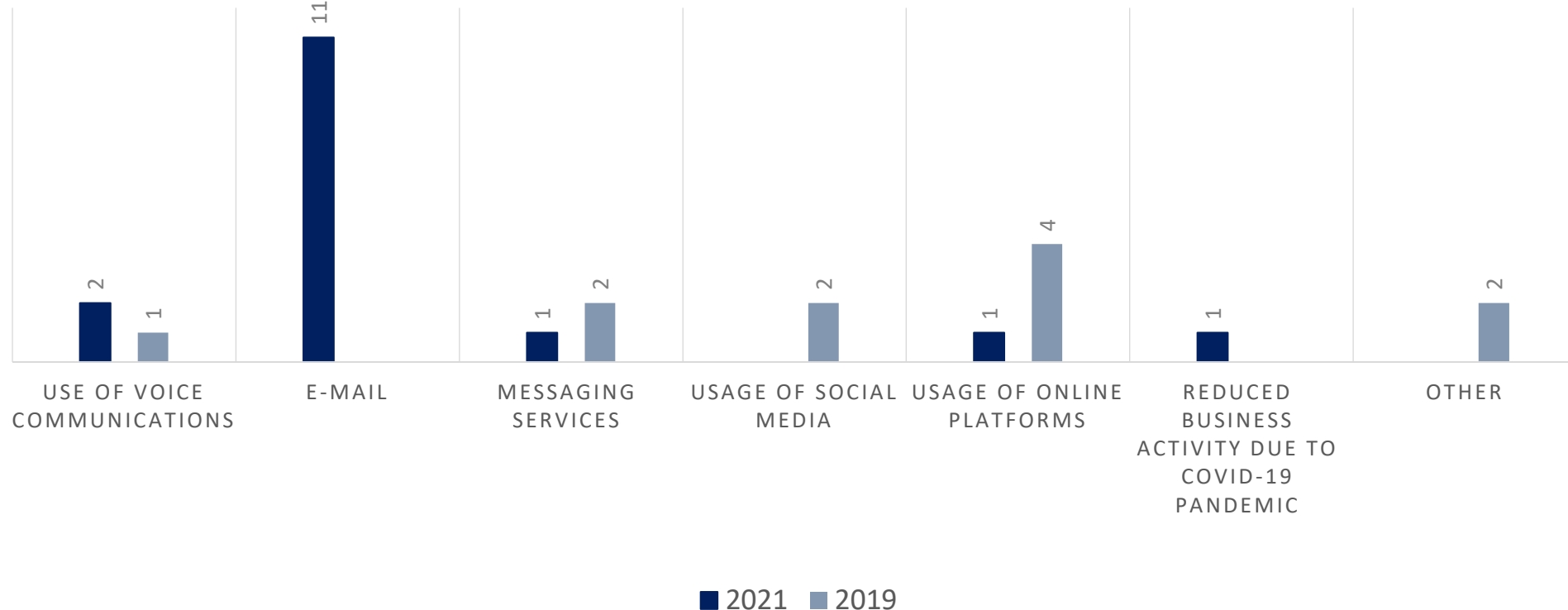


Reasons for decrease in mail sent

Number of respondents: 12 (2021) / 9 (2019)

(Question was asked to those who answered 'decrease' in previous slide. Respondents could give multiple responses.)

Technology appears to be playing a direct role in influencing bulk mail, particularly e-mail.



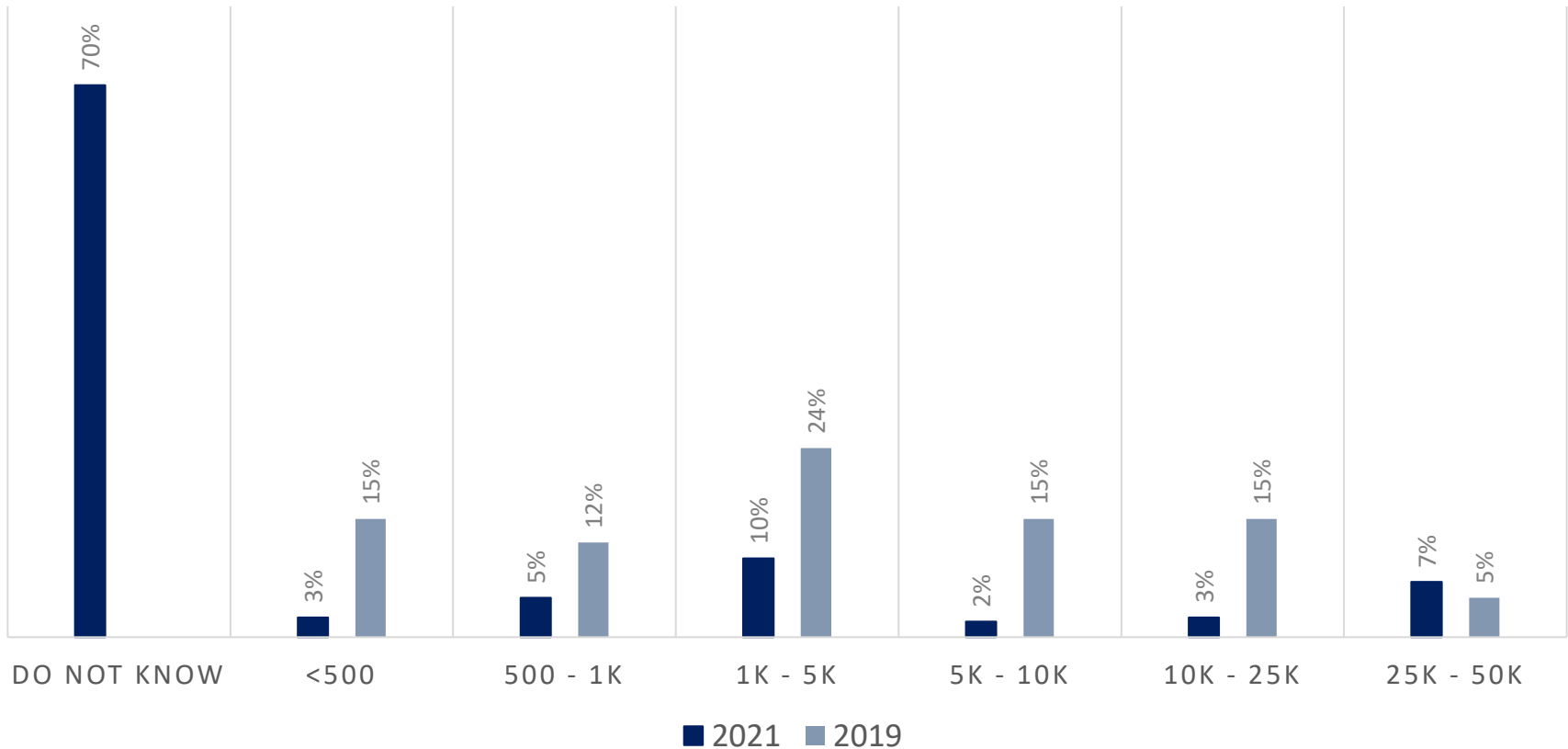
Expenditure on bulk mail activity

Average yearly expenditure

Number of Respondents: 40 (2021), 41 (2019)

All values are in Euro.

70% of bulk mailers were not able to indicate their average yearly expenditure on bulk mail.



Using bulk mail service (1 of 4)

Service initiation

Number of respondents: 40 (2021)

Organisations were asked how they tend to start the process of sending bulk mail. 48% drop the mail items off at MaltaPost's Head Office, after pre-sorting by post-code.

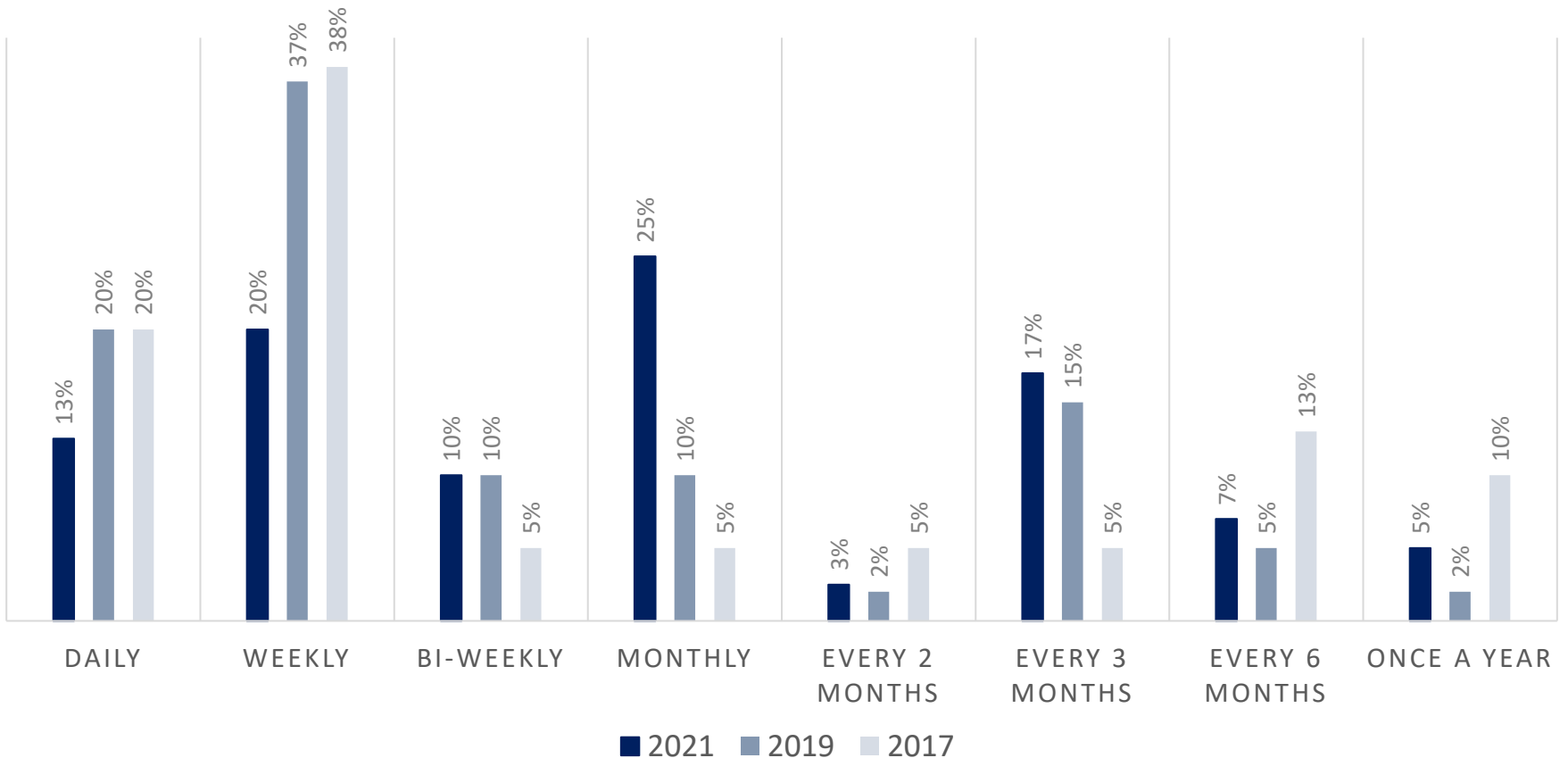


Using bulk mail service (2 of 4)

Frequency of use

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

25% of respondents make use of bulk mail monthly, whilst 20% of respondents make use of bulk mail weekly.

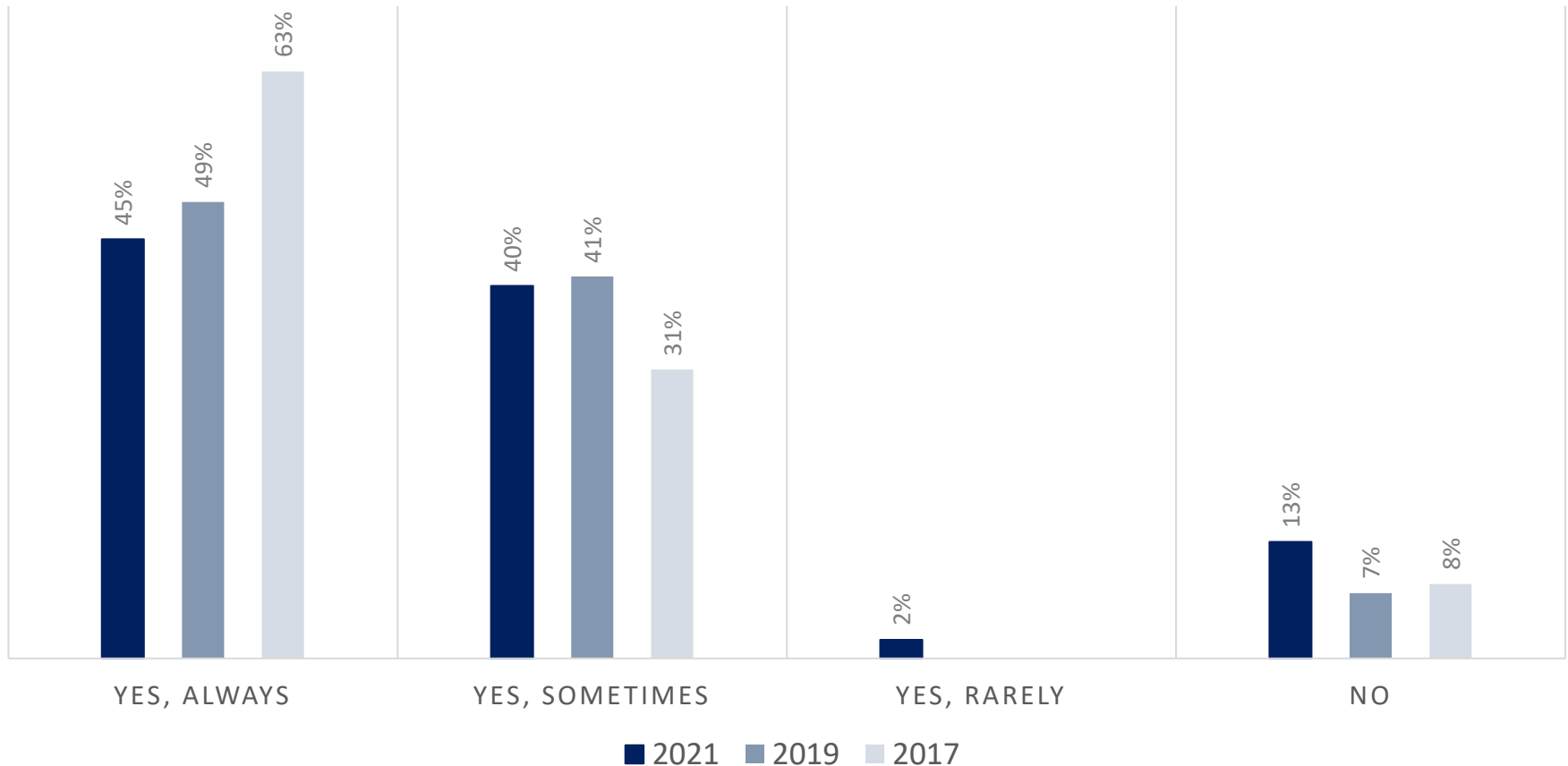


Using bulk mail service (3 of 4)

Use of postcodes

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

45% of bulk mailers always use the postcode when sending mail; 13% claim that they do not use the postcode.

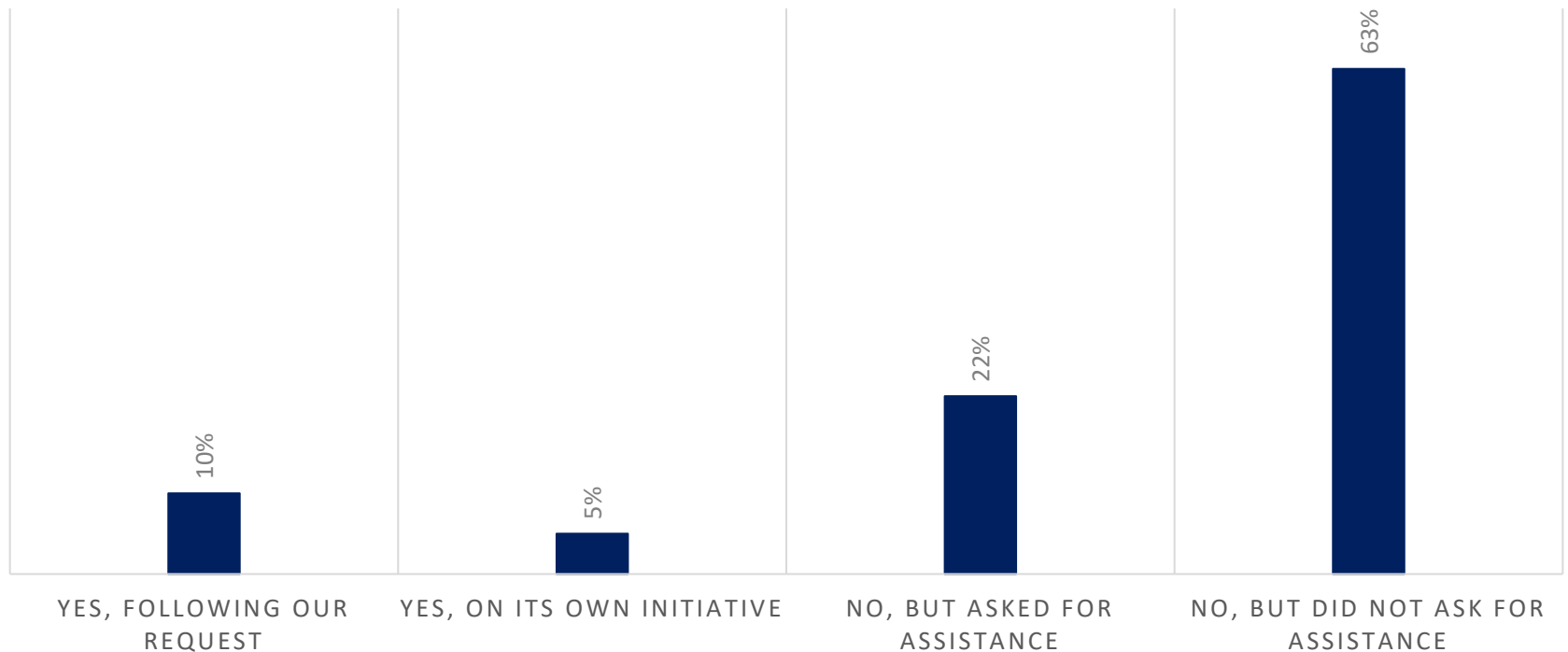


Using bulk mail service (4 of 4)

Maltapost's assistance on postcodes

Number of respondents: 40 (2021)

63% of organisations did not ask MaltaPost for assistance with the use of the post-code as part of the address when sending letter using the bulk mail service, whereas 15% were provided assistance.

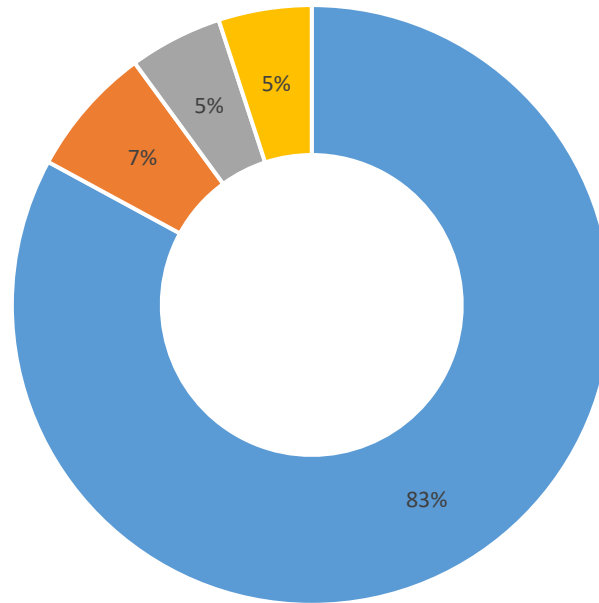


Usage plans for the bulk mail service

User intentions for the bulk mail service

Number of respondents: 40 (2021), 41 (2019)

83% say that they plan to keep using MaltaPost's bulk mail service over the next 12 months.



- Yes
- No (because electronic means of communications are a cheaper alternative to bulk mail sent by post)
- No (because using electronic means of communications proved, at least equally effective as bulk mail sent by post)
- No (other reasons - please specify)

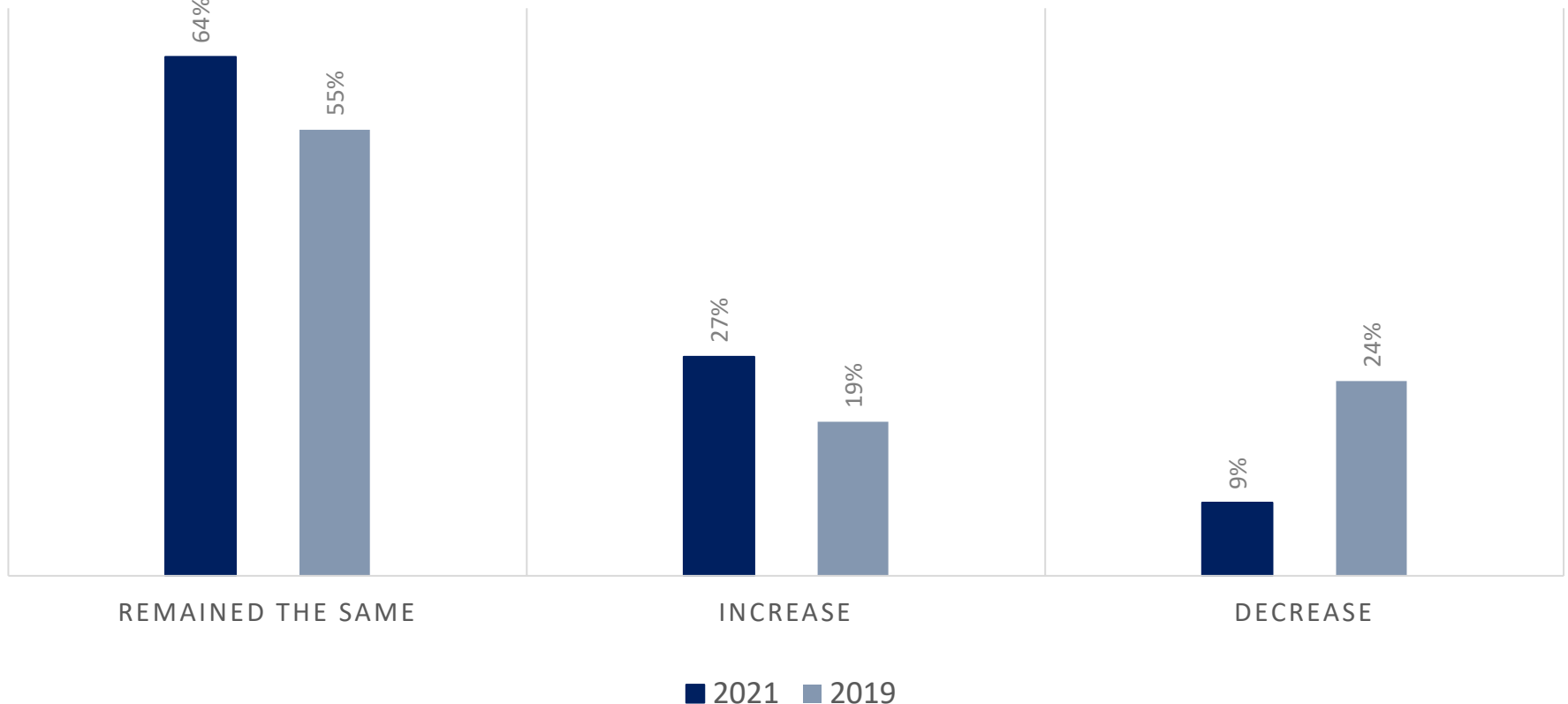
Expected usage of the bulk mail service

Expected frequency of use of MaltaPost's bulk mail service

Number of respondents: 33 (2021), 41 (2019)

(Question was asked to those who answered 'yes' in the previous question.)

64% of organisations interviewed expect usage of the bulk mail service to remain the same, while 27% expect the use of bulk mail services to increase over the next 12 months.

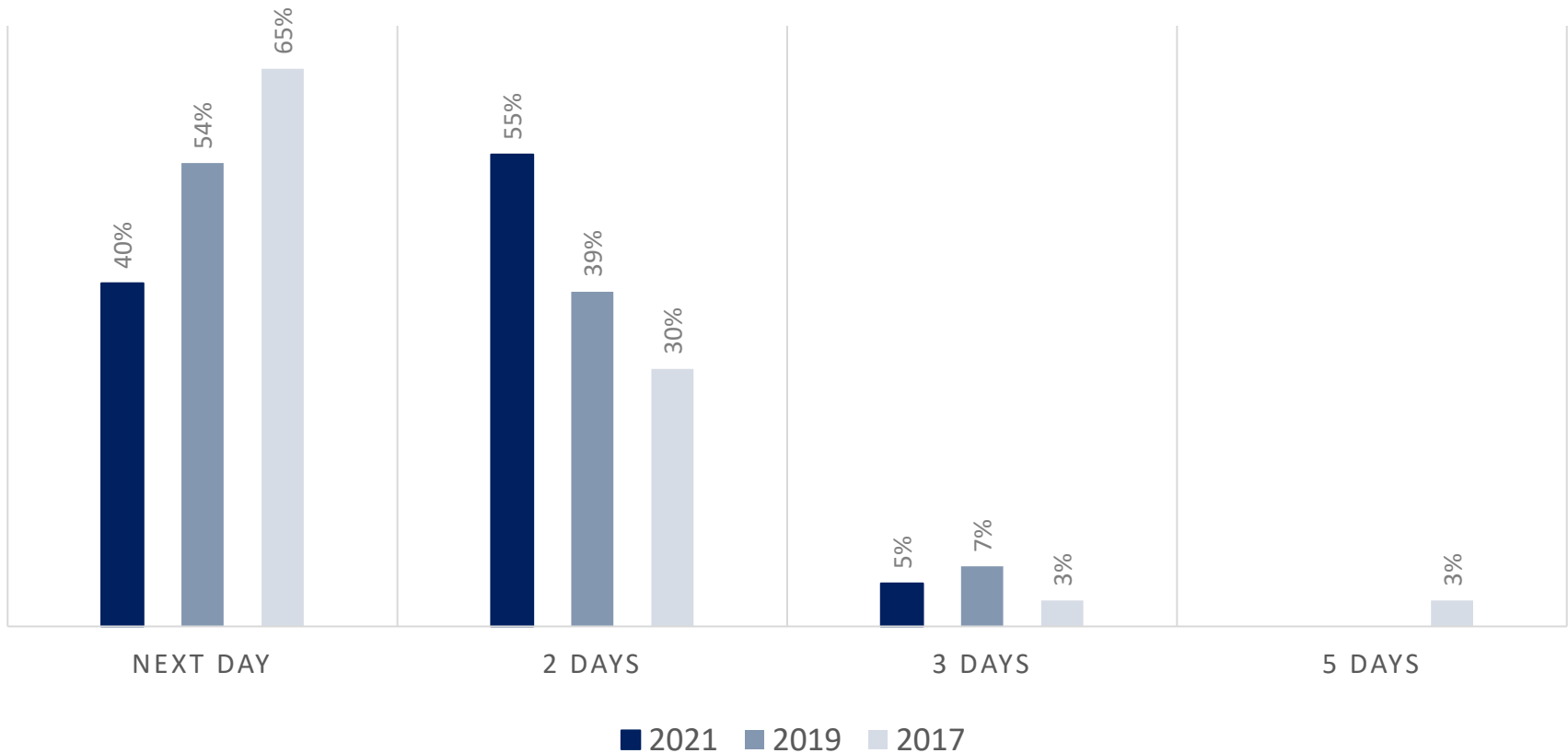


Service lead times (1 of 2)

Acceptable lead time

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

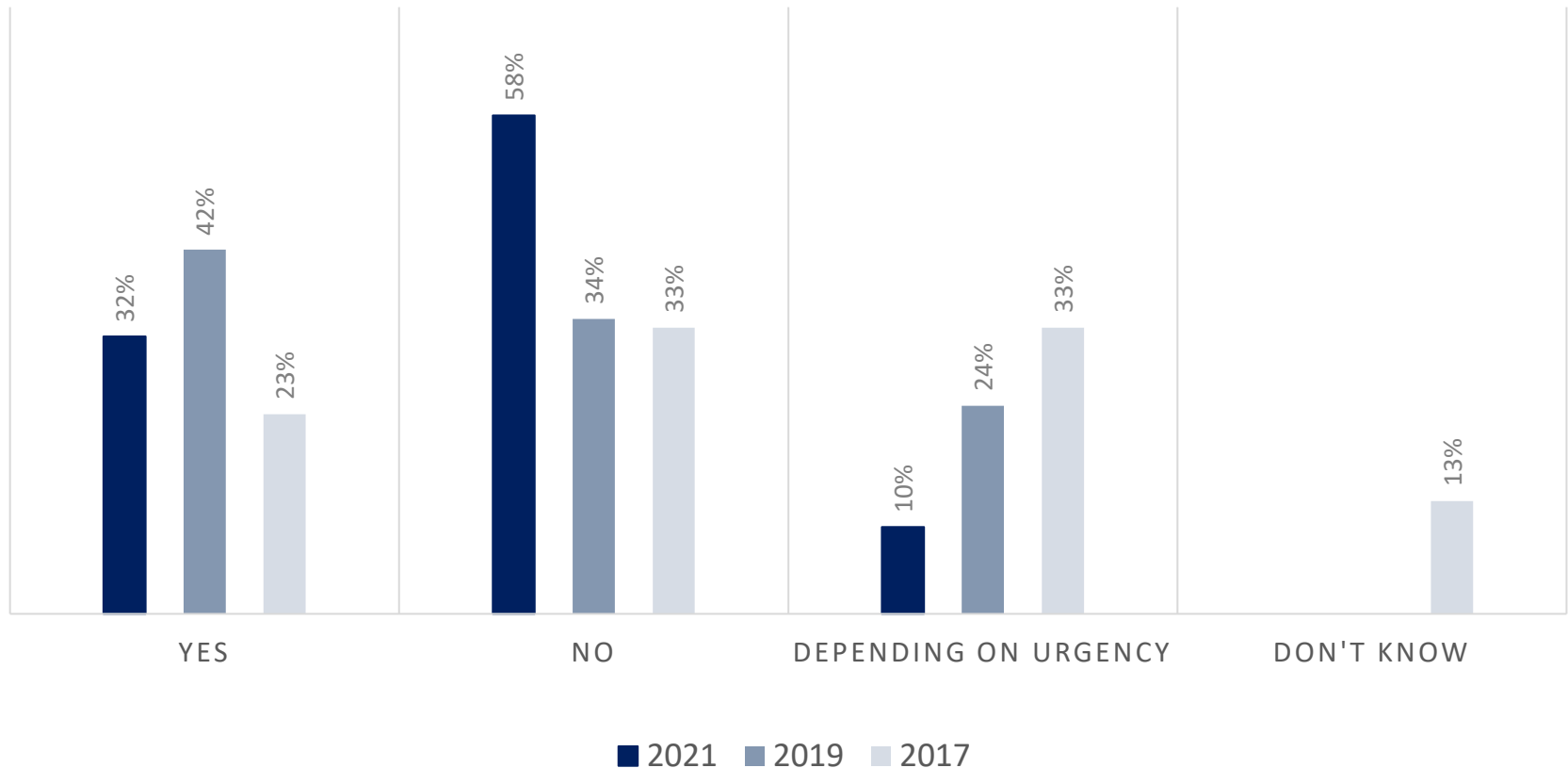
In contrast to previous years, 55% respondents believe that 2 days is an acceptable lead-time from date of posting a letter to delivery, using bulk mail service, to actual delivery, followed 40% choosing next day.



Deferred service for lower prices

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

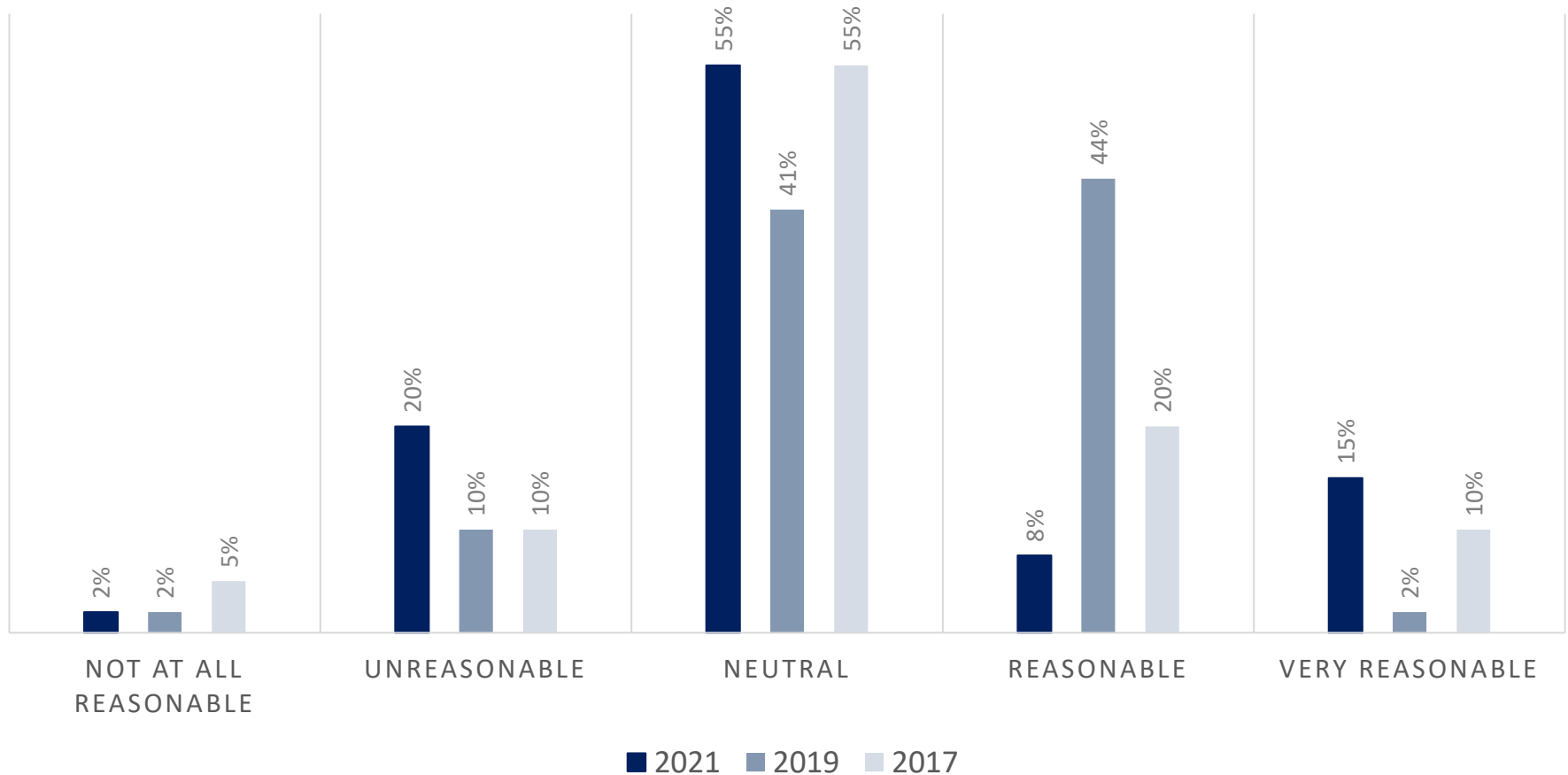
58% of respondents would not consider having deferred delivery by 2 days for cheaper / discounted prices.



Perceptions on price of the bulk mail service

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

23% of bulk mailers find the prices of bulk mail reasonable, whilst 55% are neutral on this.

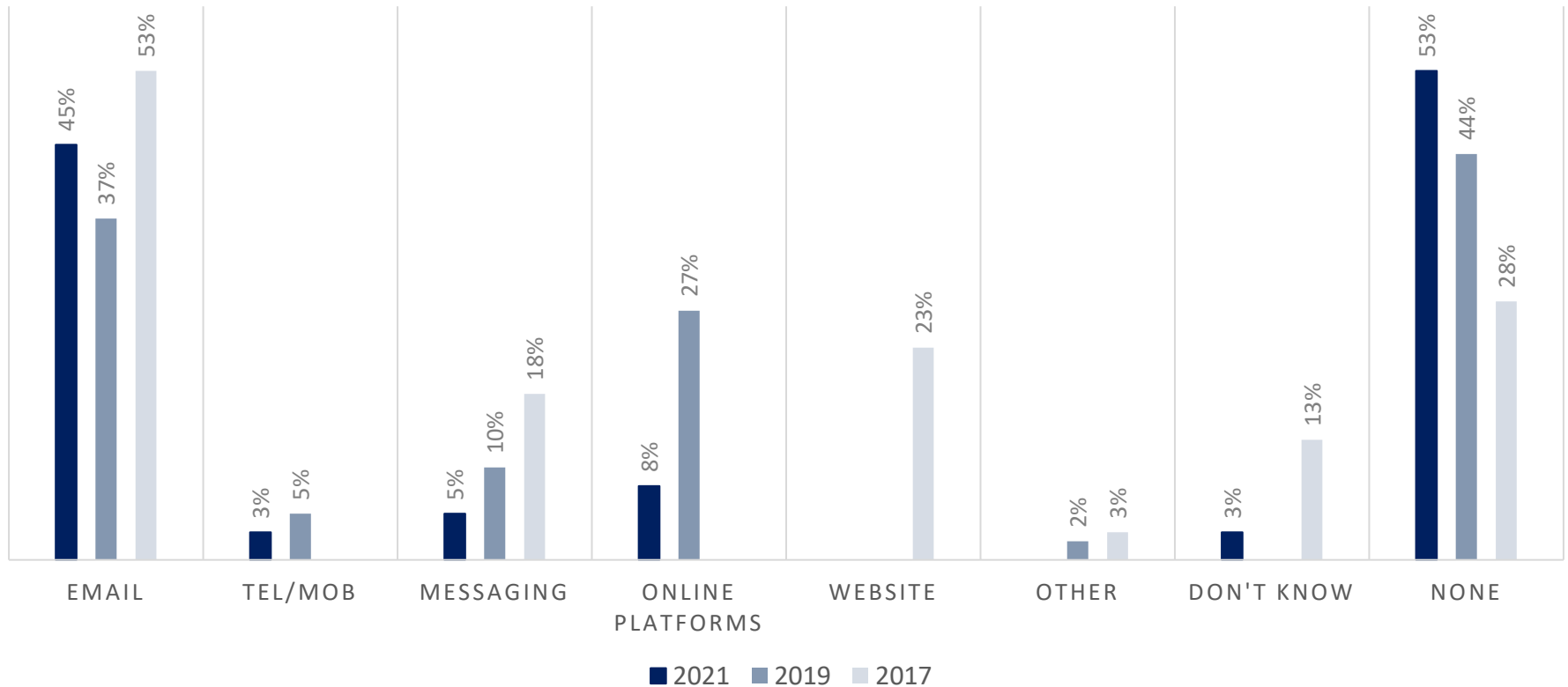


Alternatives to the bulk mail service

Alternatives considered if bulk mail prices rise

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

53% of respondents would not consider an alternative to bulk mail even if price had to increase by 5-10%.

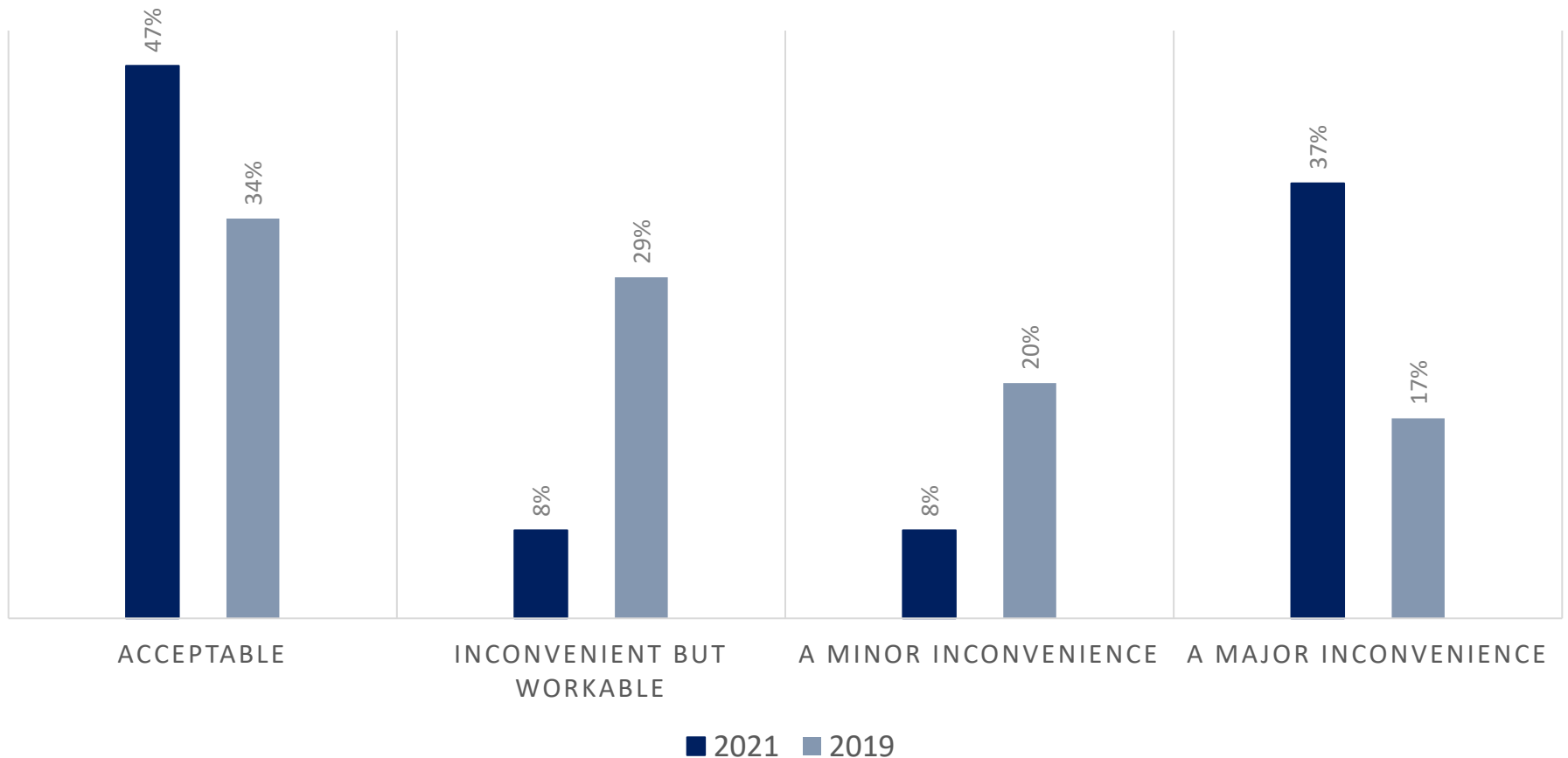


Views on delivery week (1 of 2)

Acceptability of the 5-day delivery week

Number of respondents: 40 (2021), 41 (2019)

37% (an increase of 20%) would find a 5-day week over a 6-day week to be a major inconvenience.

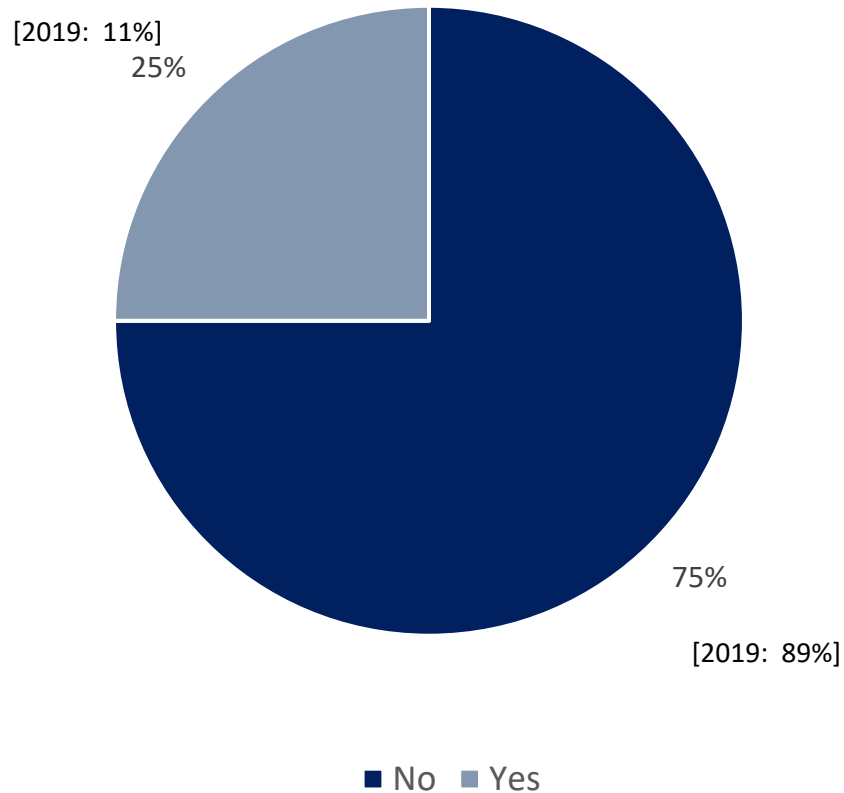


Views on delivery week (2 of 2)

Should prices increase to maintain a 6-day service?

Number of respondents: 40 (2021), 27 (2019)

75% of respondents are not willing to pay more to maintain the 6-day bulk mail service.

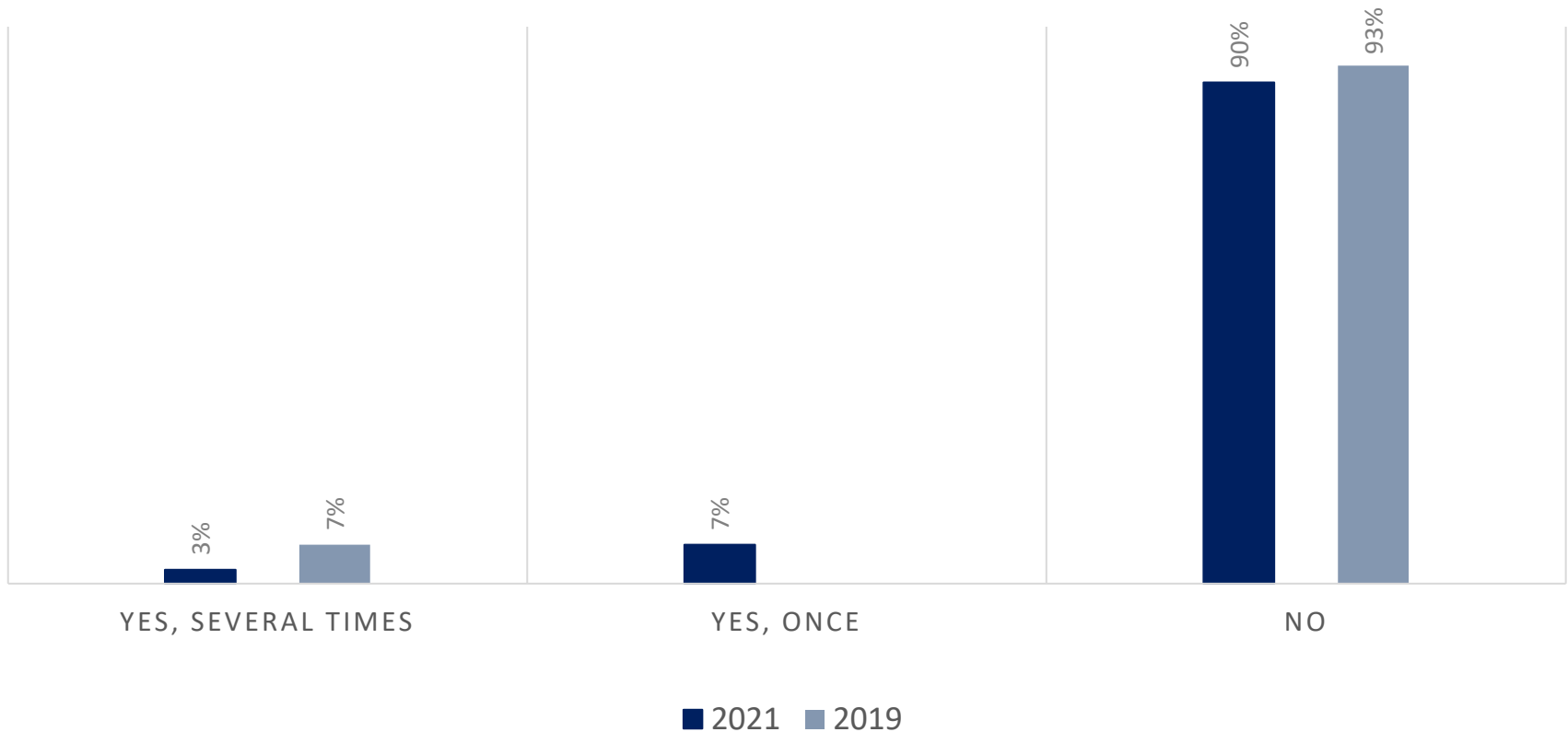


MaltaPost's quality of service (1 of 2)

Complaints made with MaltaPost

Number of respondents: 40 (2021), 41 (2019)

90% of bulk mailer surveyed have never made a complaint with MaltaPost. 2 bulk mailers out of the 4 interviewed who made formal complaints with MaltaPost have complained about mail delivered in the wrong address.

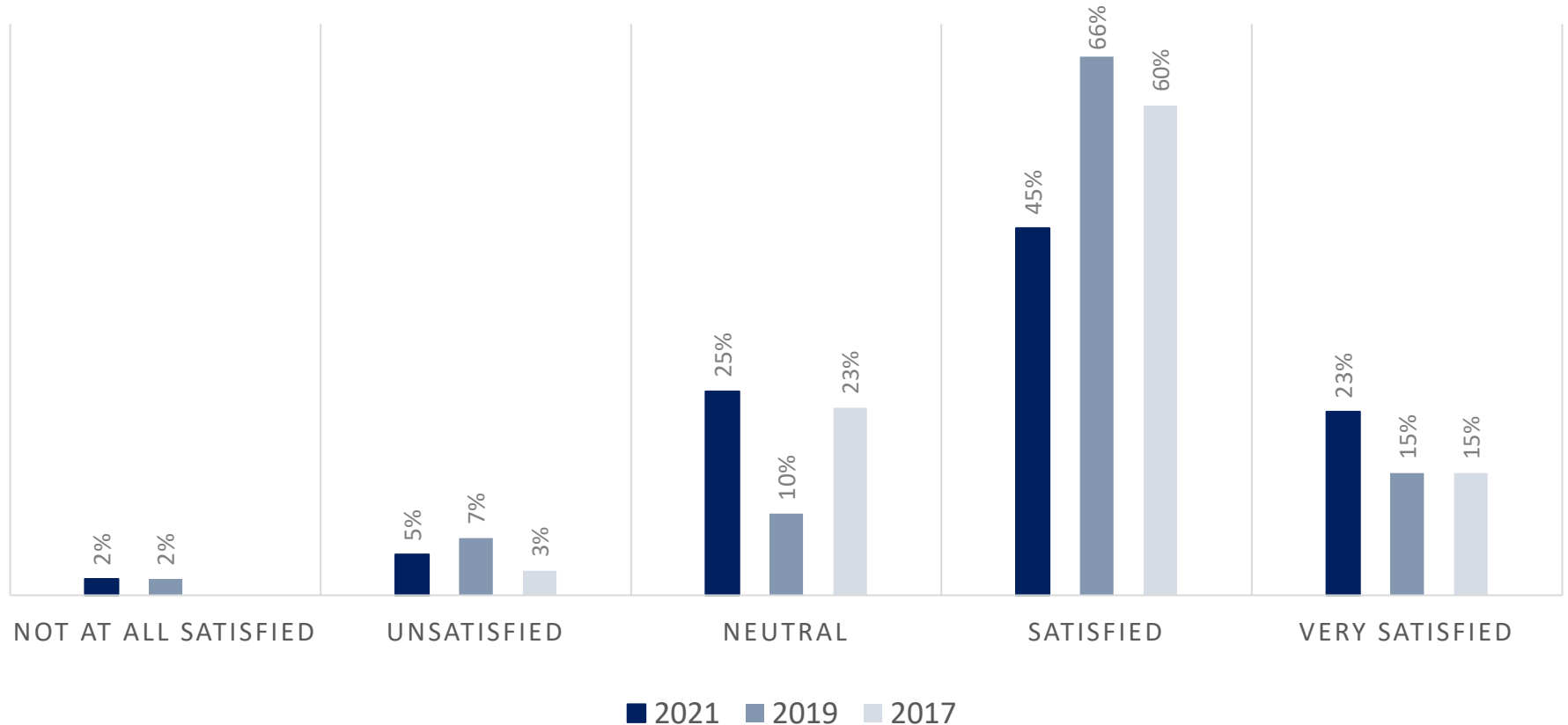


MaltaPost's quality of service (2 of 2)

Overall satisfaction with the service

Number of respondents: 40 (2021), 41 (2019), 40 (2017)

68% of bulk mail respondents are satisfied or very satisfied with the overall quality of Maltapost's bulk mail service, while 25% are neutral.





Highlights

Main Highlights (1)

- 53% of respondents claimed that the number of letters sent via bulk mail remained the same over the past twelve months with 17% of the respondents claiming that volumes increased.
- The number of respondents that noted a decrease in bulk mail volumes increased from 22% (in 2019) to 30%.
- 83% claim that they will continue to use the bulk mail service over the next twelve months indicating the importance of MaltaPost's service for bulk mailers.
- If bulk mail prices increased by 5-10%, 53% would not switch to non-postal alternatives.
- Meanwhile, 63% of bulk mailers find no major issues should MaltaPost deliver bulk mail 5 days a week and 75% are not willing to pay more to maintain a 6-day bulk mail service.

Main Highlights (2)

- Whilst 40% of bulk mailers prefer a next-day delivery service, bulk mailers that would accept a deferred delivery of 2 days increased from 39% in 2019 to 55%.
- 58% of bulk mailers would not consider a deferred delivery by 2 days for discounted prices whilst 10% would consider a deferred delivery depending on urgency.
- MaltaPost's bulk mail universal service remains an important universal postal service with 68% of respondents being satisfied with the overall quality of services provided by MaltaPost.



Thank You

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