

MCA Market Research

Postal Services – Micro Businesses Survey Results

*Malta Communications Authority
December 2011*

Presentation Structure

1. Purpose and methodology
2. Postal services for micro businesses in Malta
3. Post office services
4. Consumer satisfaction with MaltaPost's services

1. Purpose & Methodology

Purpose

- ❑ To assess the extent of **Micro Business Satisfaction** with the services provided by the Universal Service Provider (USP) - **MaltaPost**
- ❑ To monitor a number of postal service aspects, namely price levels, quality, access and complaints handling
- ❑ To provide the Authority with an indication on how small business needs are changing over time and what market trends are developing
- ❑ To serve as an additional source of information for regulatory decisions

M. Fsadni & Associates carried out the survey in November 2011 on behalf of the MCA

Fieldwork

Interviews were carried out by telephone using CATI, lasting around 10 minutes.

The survey respondents were chosen at random from GO's and Melita's Internet Telephone Directories.

Sample

Sample size was proportionally distributed across the 9 postal regions defined by MaltaPost.

The interviews were carried out with micro businesses that have been randomly selected on the basis of this distribution.

Each respondent was the one responsible for mail and other postal articles in that business.

Responses

395 net respondents

Any refusals / incomplete surveys were re-allocated to achieve a net sample of at least 400 interviewees.

Margin of error: +/- 4.88% at 95% confidence interval.

Methodology – Important to note

- ❑ In 2010, the population of micro enterprises (engaging between 0 – 9 employees) stood at 62,389 business units. This accounts for a significant 97% of Malta’s total business population. (NSO, 2011)
- ❑ 1,492 units (2.3%) were small enterprises, employing between 10 – 49 employees. (NSO, 2011)
- ❑ 0.7% of Malta’s business population comprise 336 medium-sized enterprises, engaging between 50 – 249 employees and 81 large enterprises, employing 250+ employees. (NSO, 2011)
- ❑ This survey has been carried out with the micro enterprises category (97% of the total business community in Malta).
- ❑ Another postal services survey is currently being conducted with large bulk mailers.

Surveyed Industries

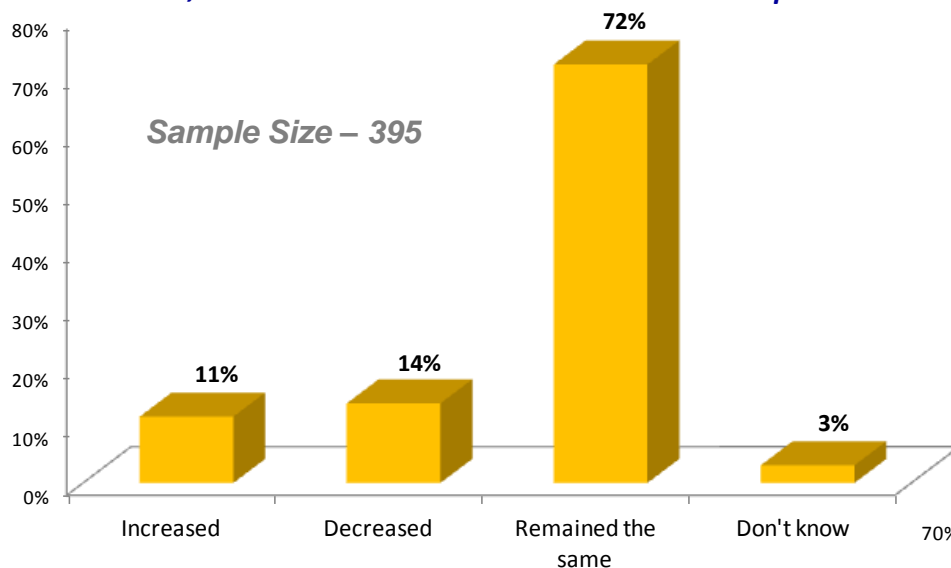
Surveyed Industries	% of sample size (n~395)
Manufacturing; Agriculture, Hunting & Forestry; Electricity, Gas & Water Supply	12%
Construction, Mining & Quarrying	3%
Wholesale & Retail Trade, Repairs	54%
Hotels & Restaurants	4%
Transport, Storage & Communications	2%
Financial Intermediation, Real Estate & Renting, and Business Activities	6%
Public Administration; Compulsory Social Security	2%
Education	1%
Health and Social Work	7%
Other Community, Social and Personal Service Activities	9%

Note: Sample size was proportionally distributed across the 9 postal regions defined by MaltaPost and **not** by the type of industry. **Therefore**, the above distribution by industry may not necessarily represent the actual reality but depends very much on the postal regional sampling.

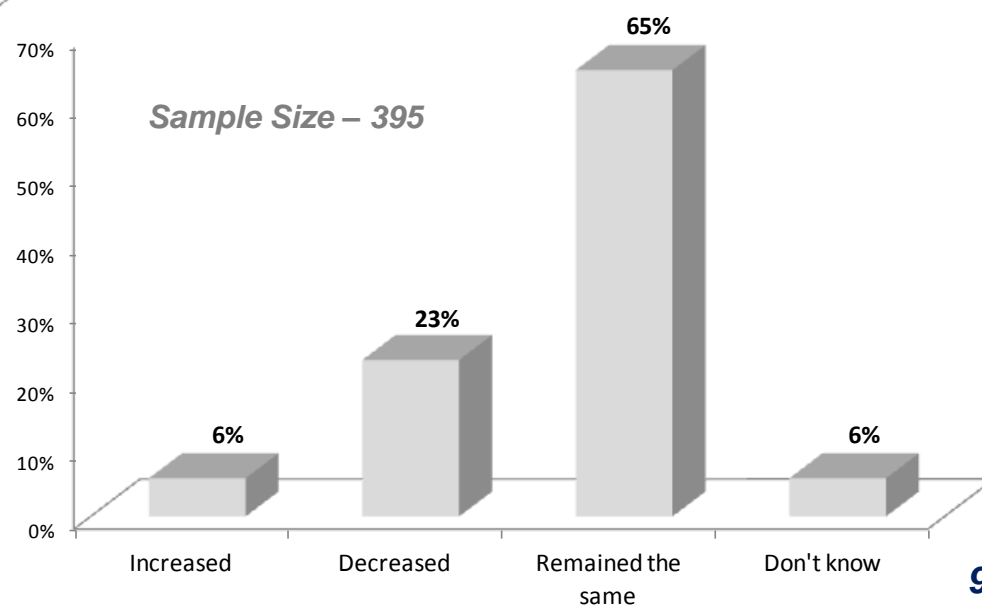
2. Postal Services for Micro Businesses in Malta

Activity of Postal Services – Micro Businesses (1)

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

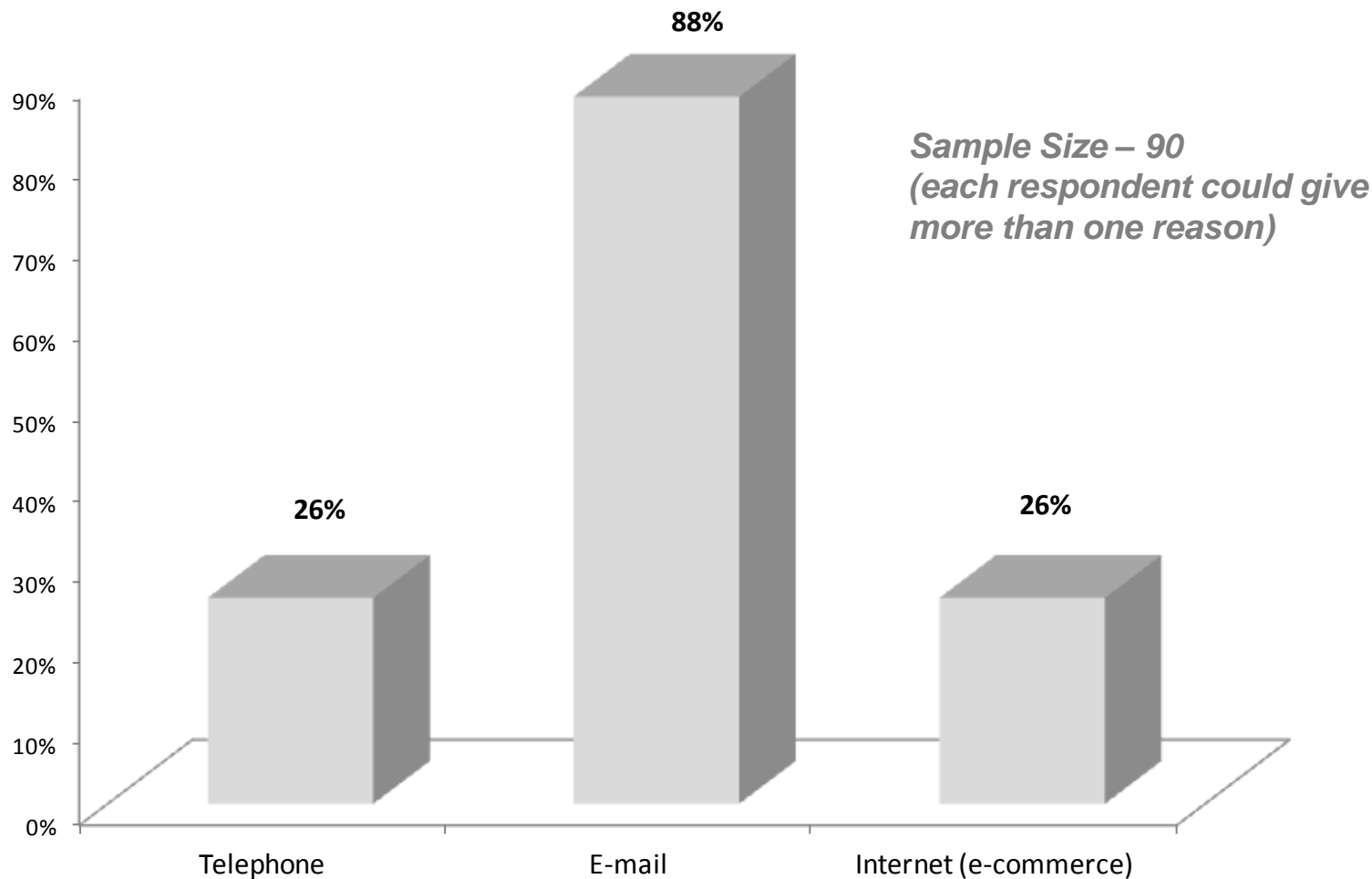


*Did the number of addressed letters **sent** each week increase, decrease, or remain the same over the past twelve months?*



Activity of Postal Services – Micro Businesses (2)

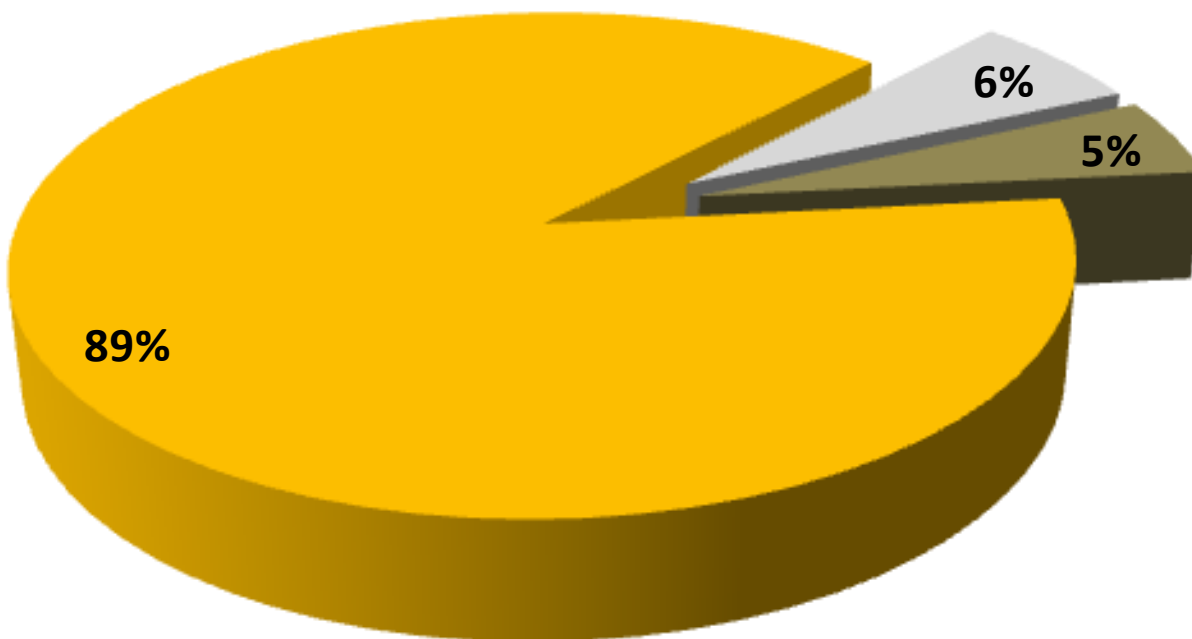
If there was a decrease in the number of addressed letters sent, what are the main reasons?



Delivery of Registered Mail

Is someone from the business normally present when MaltaPost delivers registered mail?

Sample Size – 254



■ Yes ■ No ■ Don't know

Mornings are the preferred time during the day to receive registered letters, with 63% of respondents say it is the most convenient for their business.

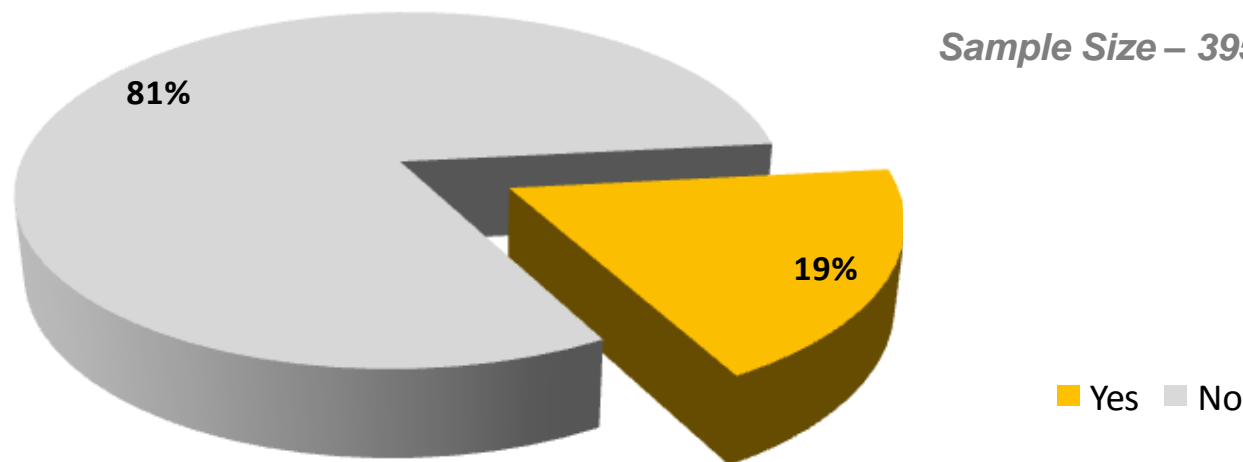
32% of respondents say they have no particular day or time in which they prefer to receive registered letters.

The remaining 5% of businesses say they prefer afternoons.

Delivery of Registered Mail – Traffic fines

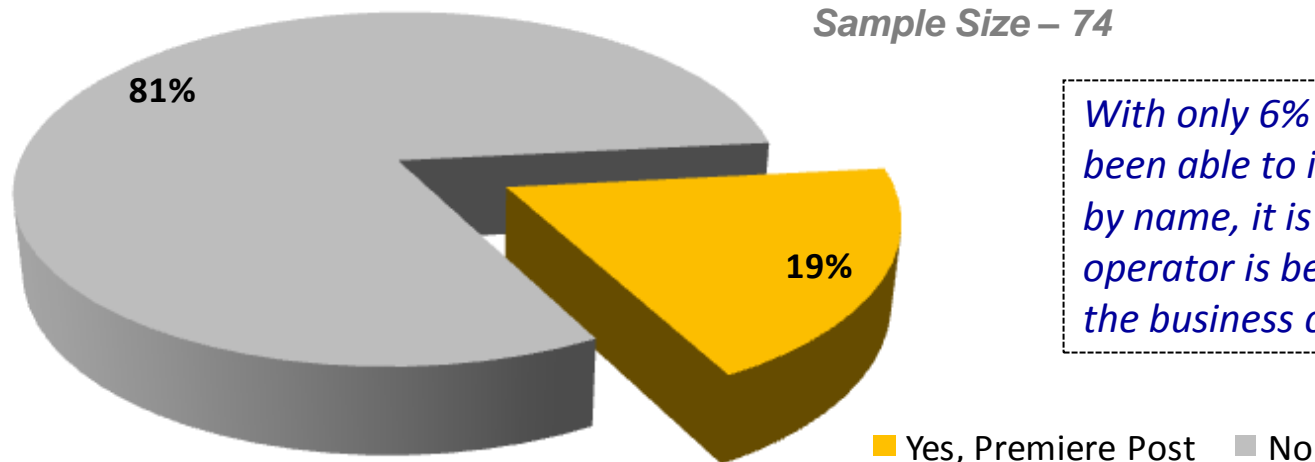
Are you aware that traffic fines (e.g. Issued by local wardens) are also delivered by another operator, apart from MaltaPost?

Sample Size – 395



If you are aware of this fact, do you know the name of the operator?

Sample Size – 74

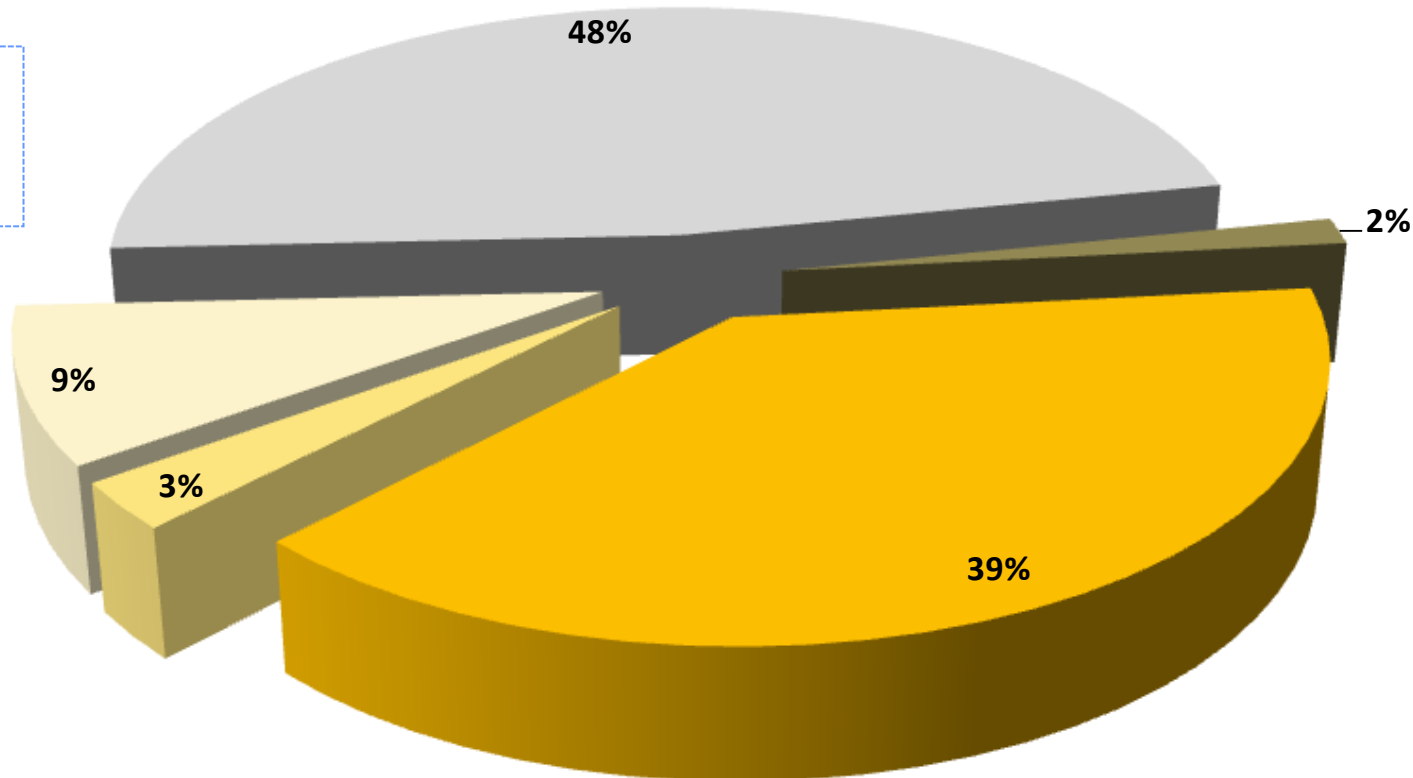


With only 6% of households having been able to identify Premiere Post by name, it is clear that this operator is better known among the business community

Delivery of Parcels

Have you received any parcels during the last 12 months?

Sample Size – 395



51% of micro businesses say they received a parcel during the last 12 months.



12% of micro businesses say the parcel was delivered by an operator; other than MaltaPost.



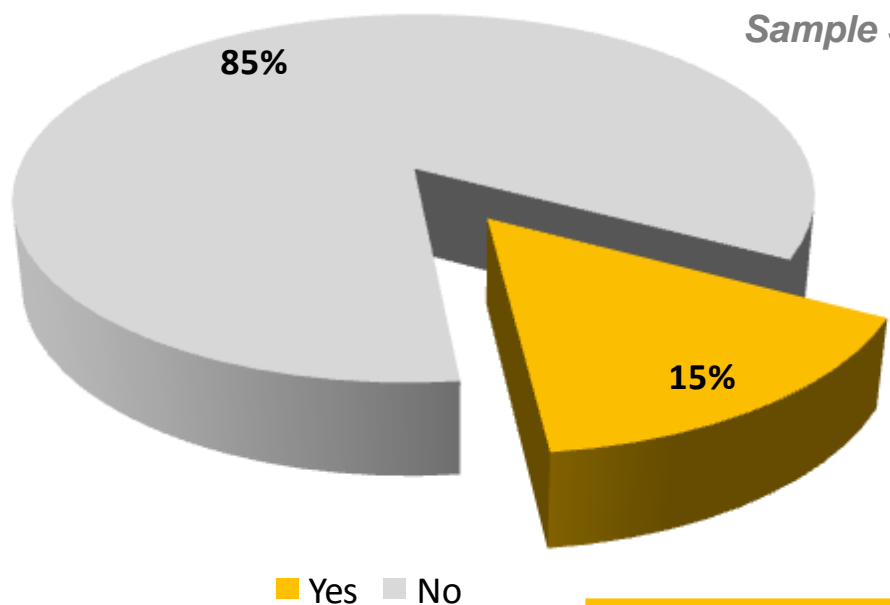
Of this 12%, more than 60% confirm it was delivered by DHL. Other operators mentioned include FedEx, UPS and TNT.

- Yes, from MaltaPost
- Yes, from another operator
- Yes, from both MaltaPost and other operators
- No
- Don't know

Alternative Postal Operators

Have you used other providers besides MaltaPost to send postal articles?

Sample Size – 395



In the postal services survey carried out with households it resulted that only 3% of households used alternative operators to send postal articles.

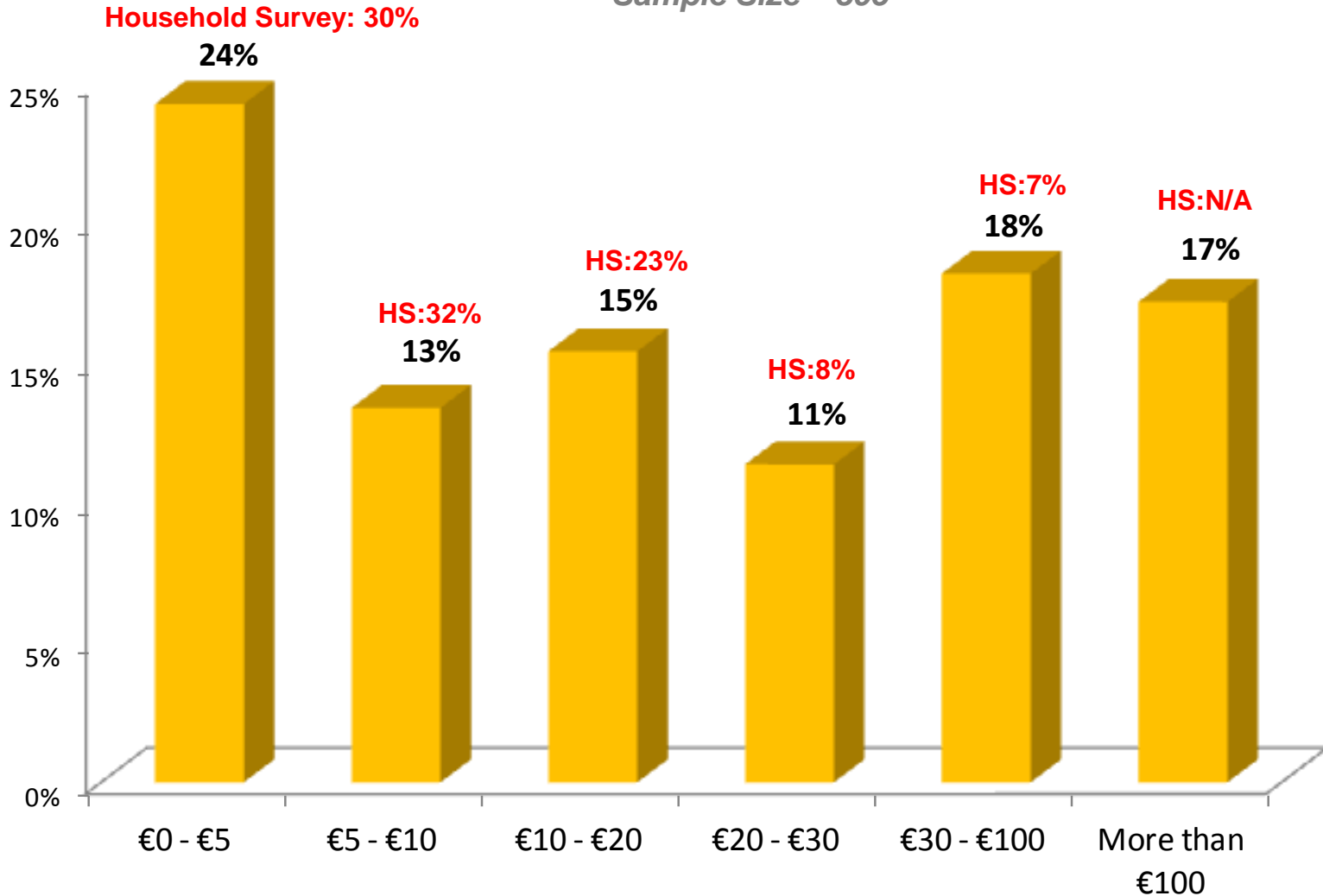
In comparison, micro businesses use alternative postal operators more, with 15% claiming to have used other providers besides MaltaPost to send their postal articles.

Reasons stated for using other operators' services	% of micro businesses who used alternative postal operators
More reliable	23%
Cheaper	11%
Faster	54%
More secure	11%
Easily Accessible	16%

Expenditure on Postal Articles

What is the average amount of money spent by your business on postal articles during the past twelve (12) months?

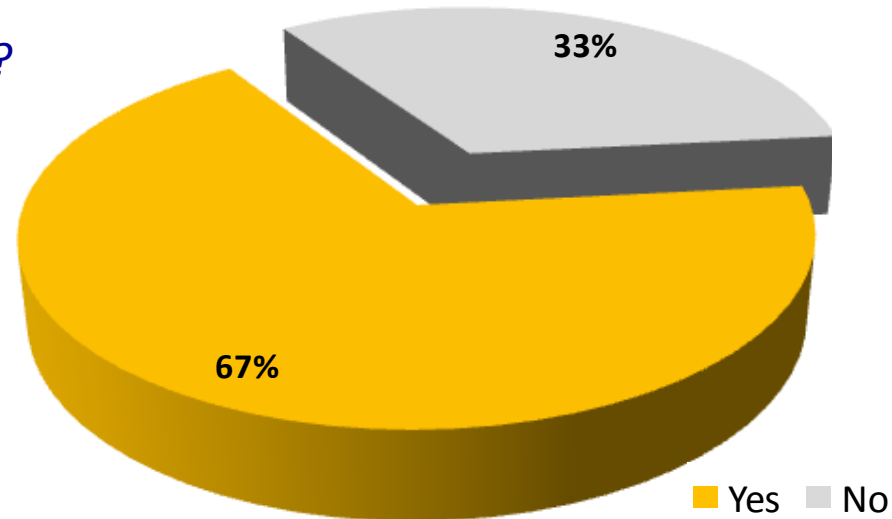
Sample Size – 395



Businesses' Awareness on Current Post-code Format & Letterbox Specifications (1)

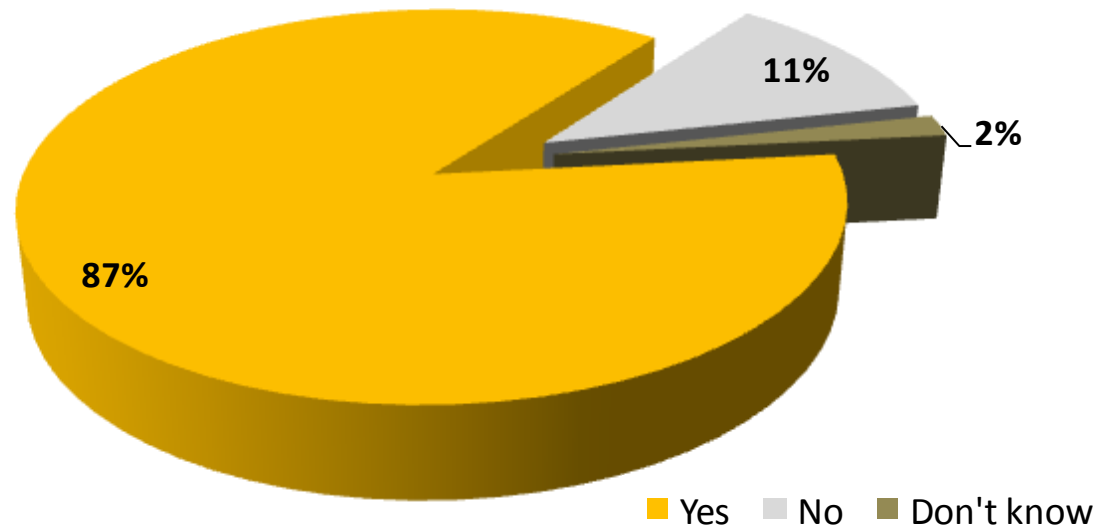
Do you know your current post-code?

Sample Size – 395



Do you think that your letterbox is directly accessible to the postman /postwoman?

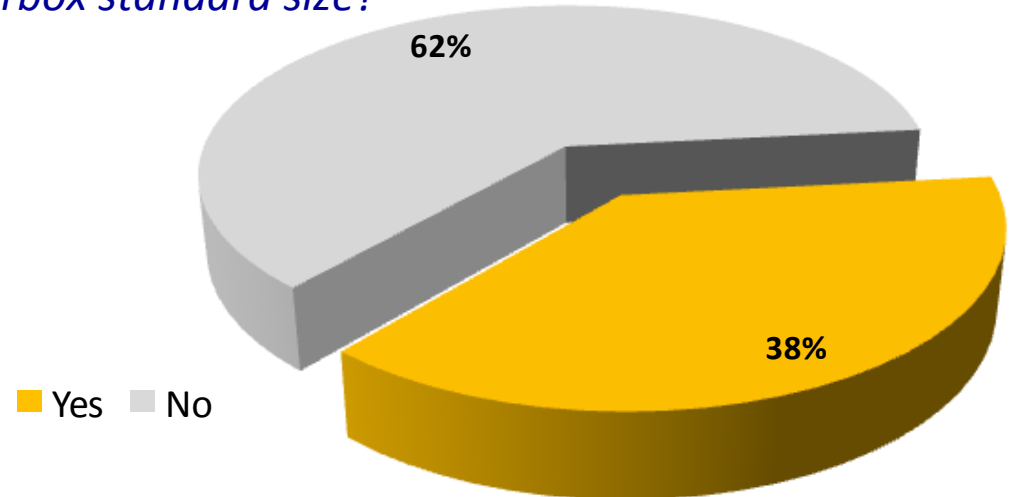
Sample Size – 395



Businesses' Awareness on Current Post-code Format & Letterbox Specifications (2)

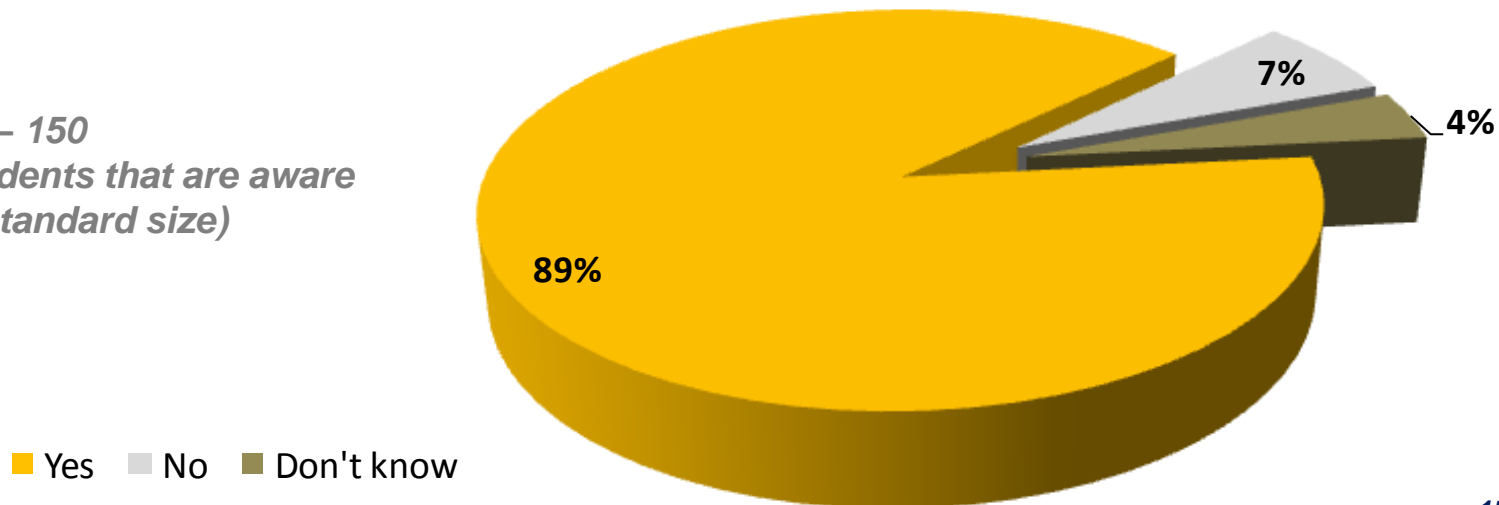
Are you aware of the appropriate letterbox standard size?

Sample Size – 395



Does your letterbox conform to the appropriate standard size?

Sample Size – 150
(Only respondents that are aware of letterbox standard size)



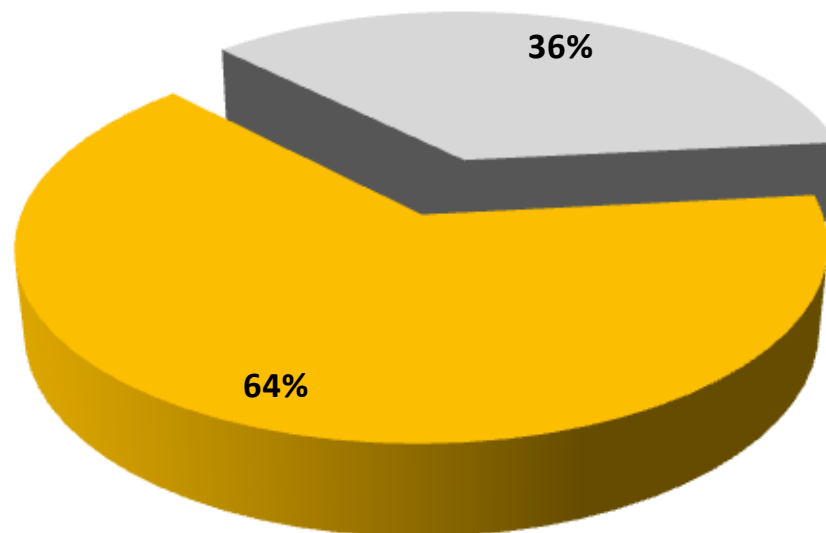
3. Post Office Services

Post Office Activity (1)

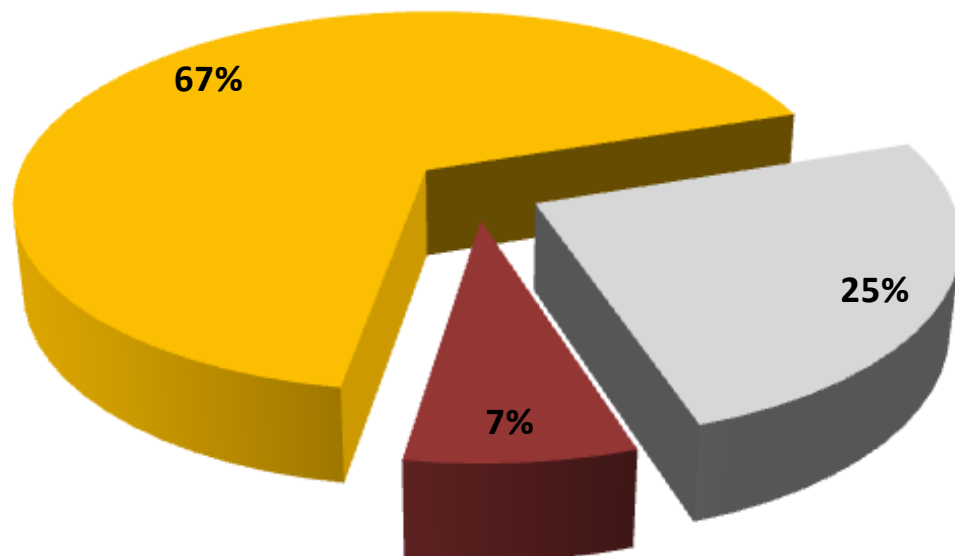
Have you been to the Post Office to use a service during the last twelve months?

Sample Size – 395

Yes No



Was it a ...



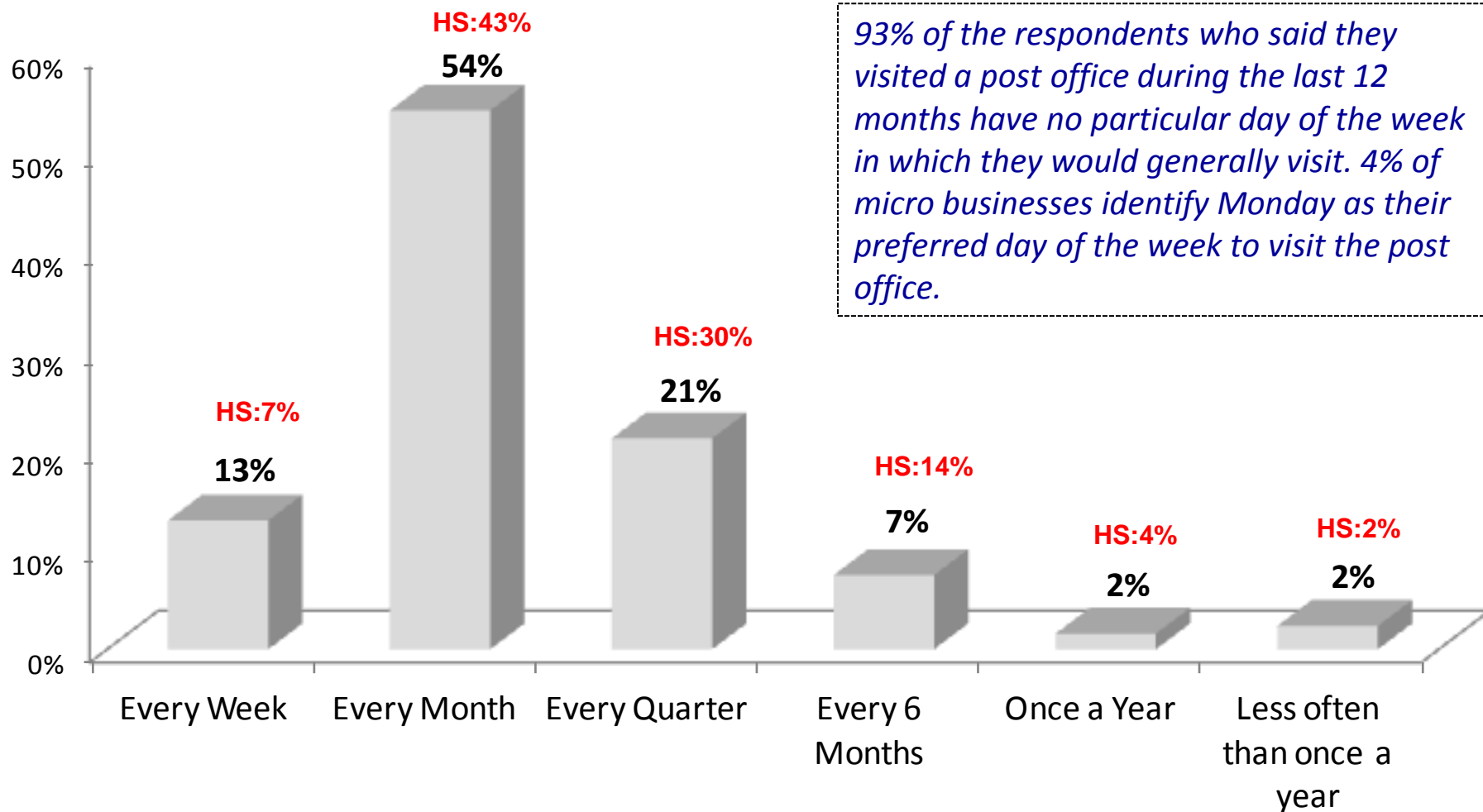
Sample Size – 254

MaltaPost office MaltaPost sub-post office Both

Post Office Activity (2)

How often do you go to the Post Office?

Sample Size – 254



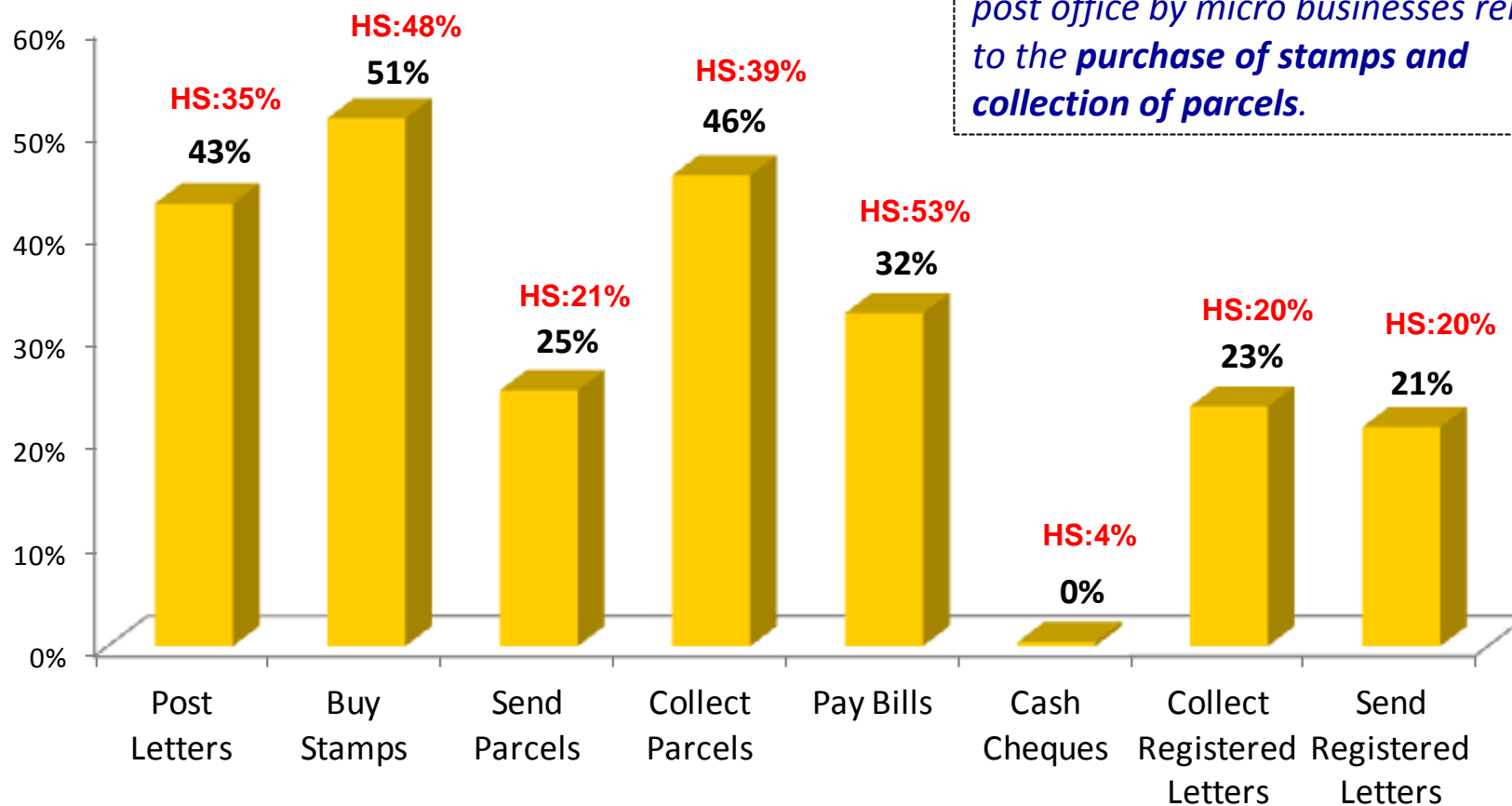
93% of the respondents who said they visited a post office during the last 12 months have no particular day of the week in which they would generally visit. 4% of micro businesses identify Monday as their preferred day of the week to visit the post office.

Services at the Postal Offices

What services have been received from the Post Office?

Sample Size – 254

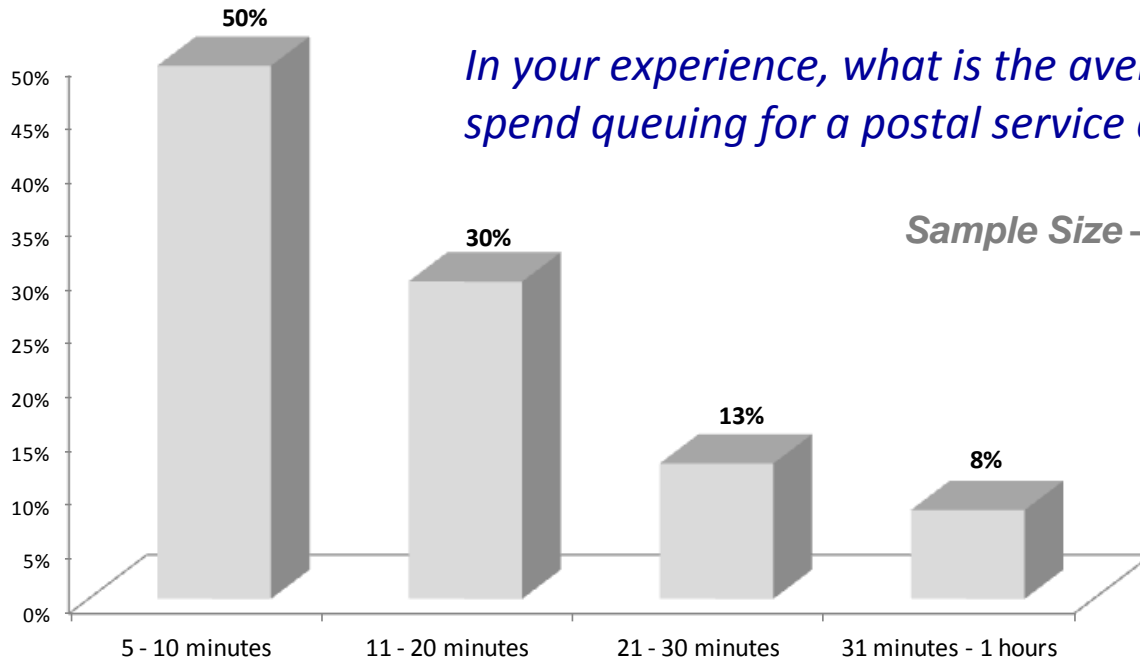
(respondents could mention more than one service)



*The most demanded services at the post office by micro businesses relate to the **purchase of stamps and collection of parcels.***

Service Efficiency

In your experience, what is the average time you generally spend queuing for a postal service at a MaltaPost office?

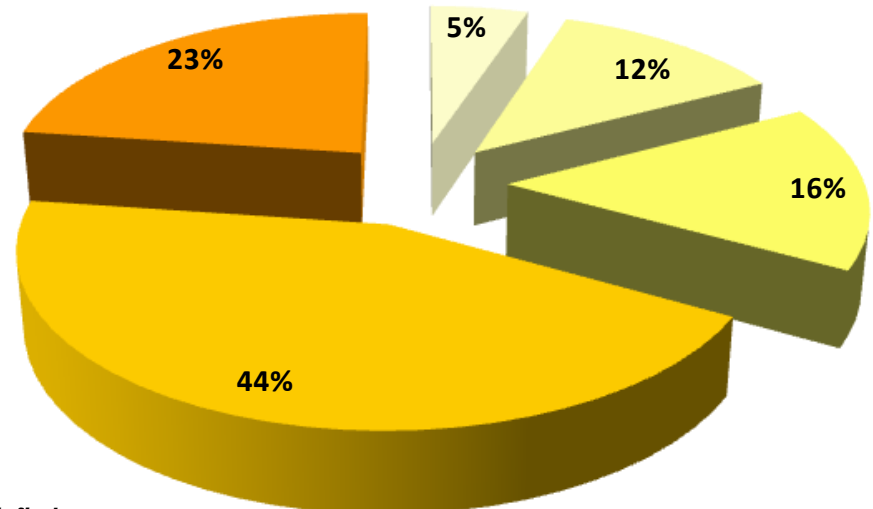


Sample Size – 254

Do you think this is satisfactory?

Sample Size – 254

67% of micro businesses are happy with the waiting time – slightly less than the 70% resulting from the household survey.

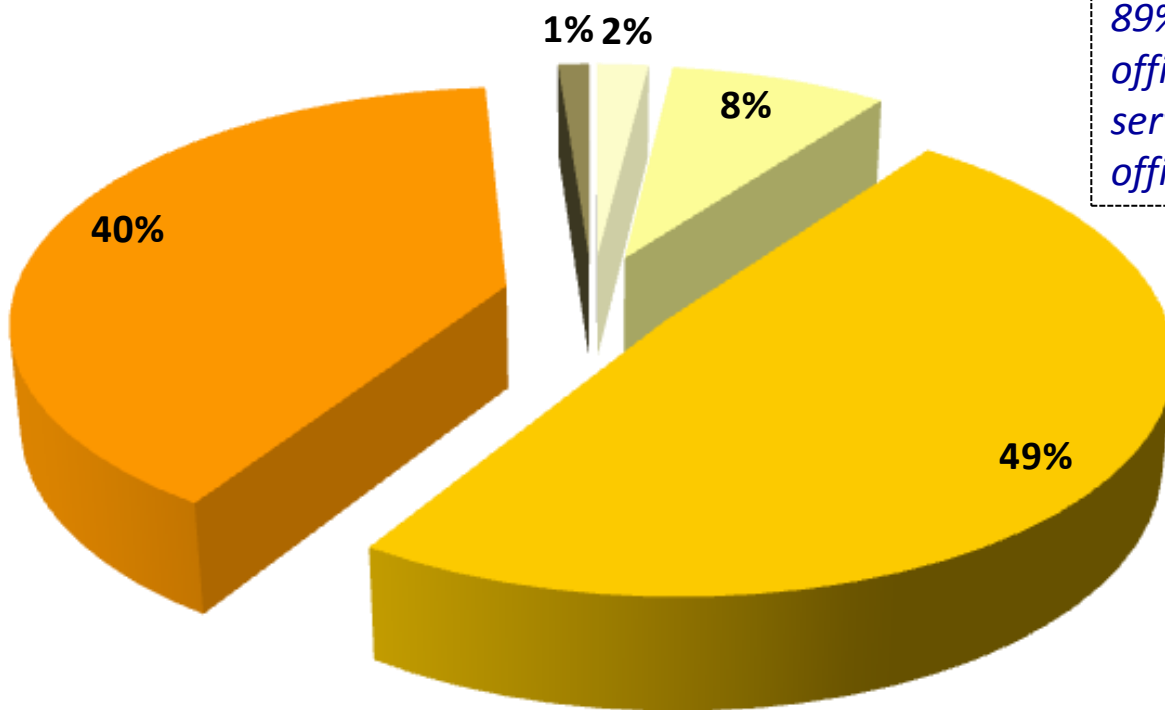


Not at all satisfied → Completely Satisfied

Quality of Service Satisfaction

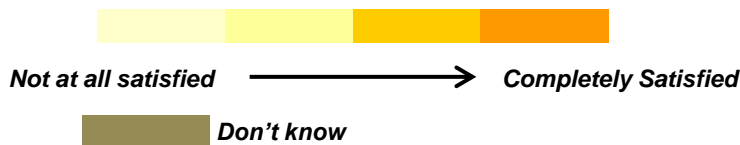
Are you generally satisfied with the services/facilities provided by the Post Office?

Sample Size – 254



89% of micro businesses visiting a post office are satisfied with the level of services / facilities provided at the post office .

Of the respondents that are not satisfied with the level of services provided at the post office, 73% blame it on queues, 38% complain about the lack of parking facilities while 31% complain about the opening / closing hours of the post offices.

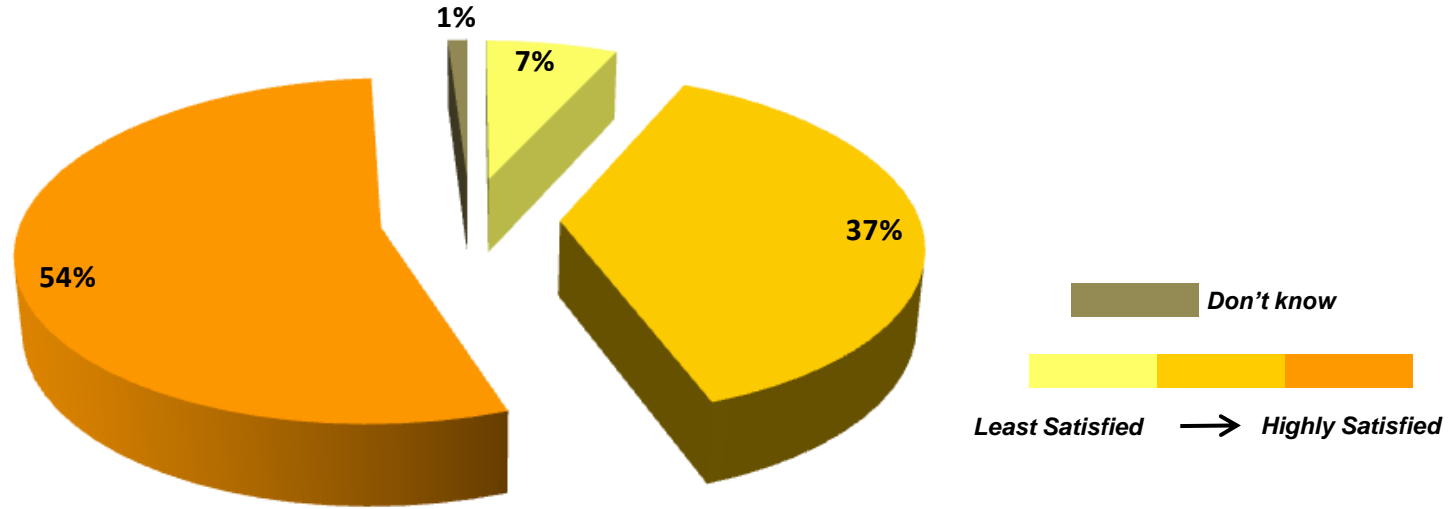


4. Consumer Satisfaction with MaltaPost's Services

Satisfaction with ...

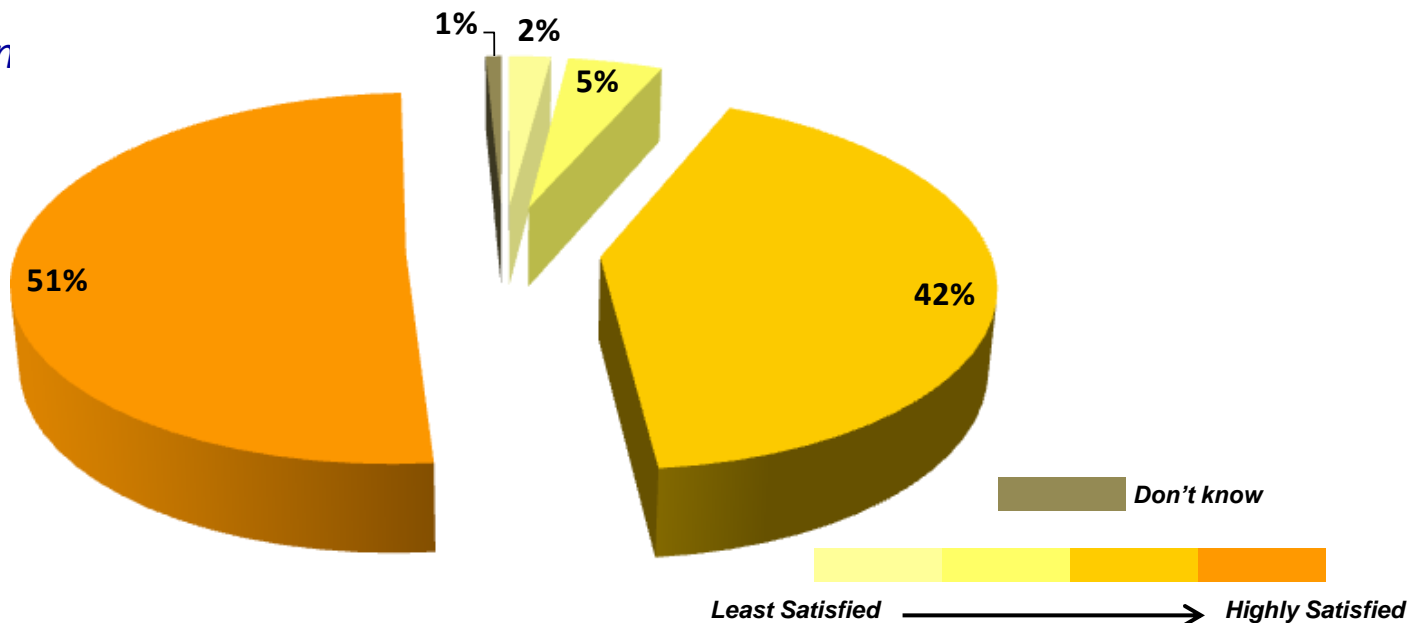
Courtesy of Postman

Sample Size – 395



Reliability of Postman

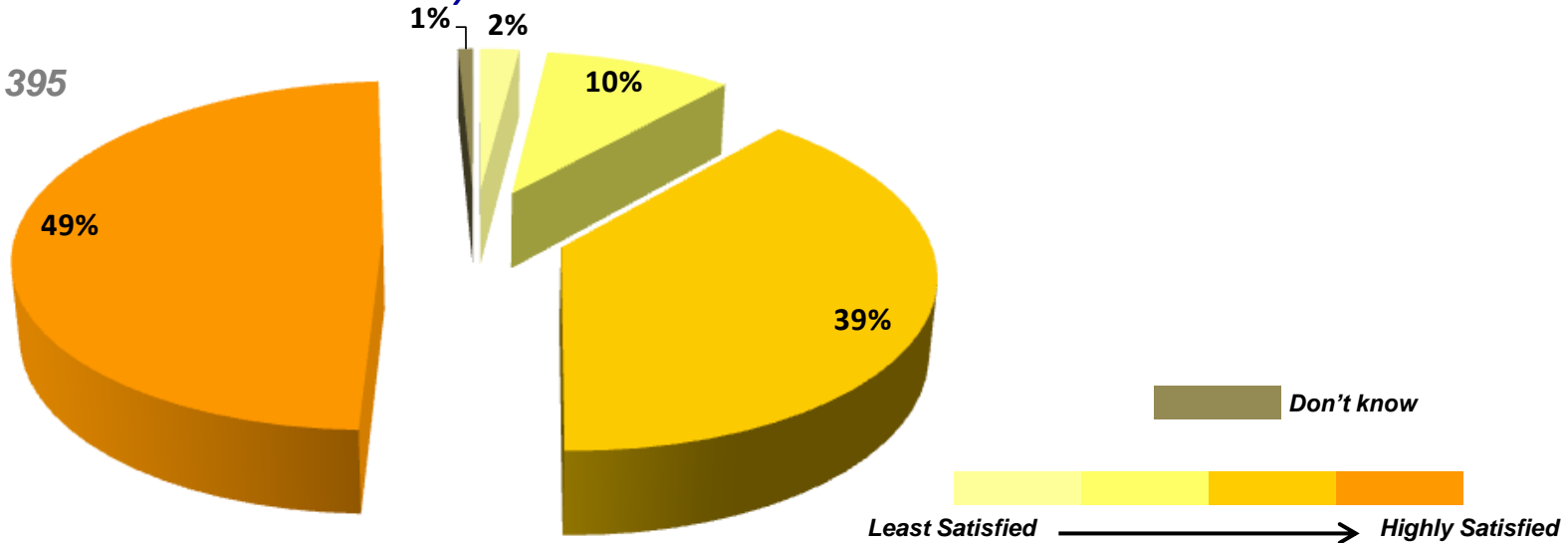
Sample Size – 395



Satisfaction with...

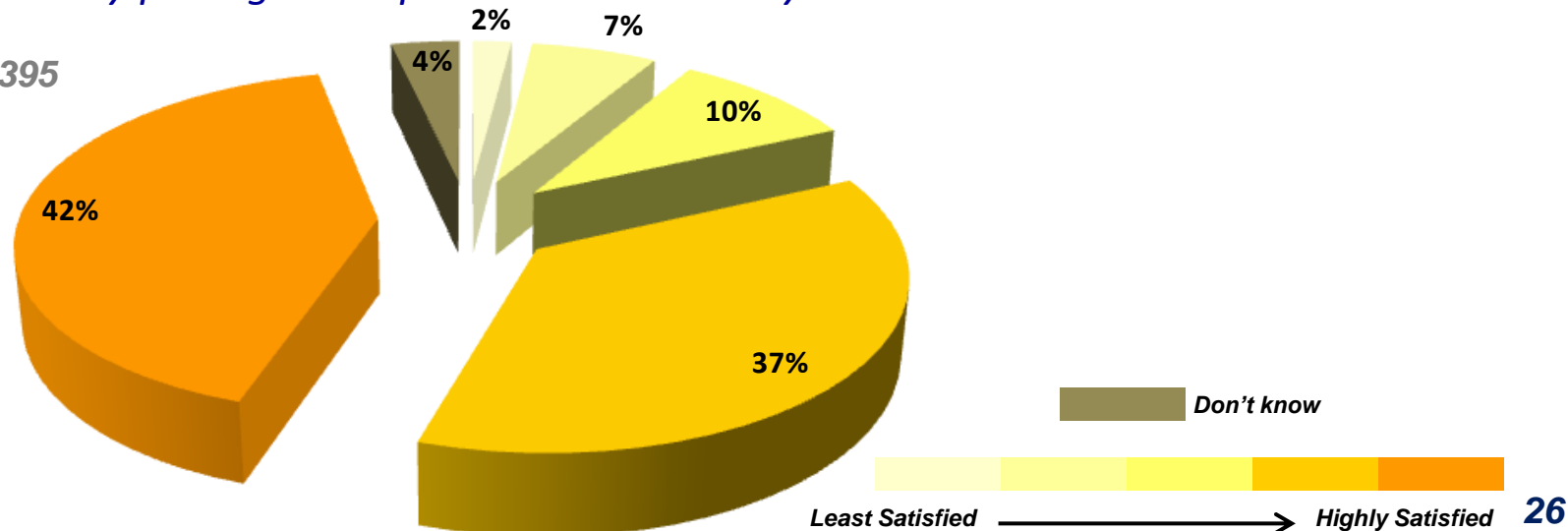
The time your post is delivered each day

Sample Size – 395



The availability to buy postage stamps when and where you want

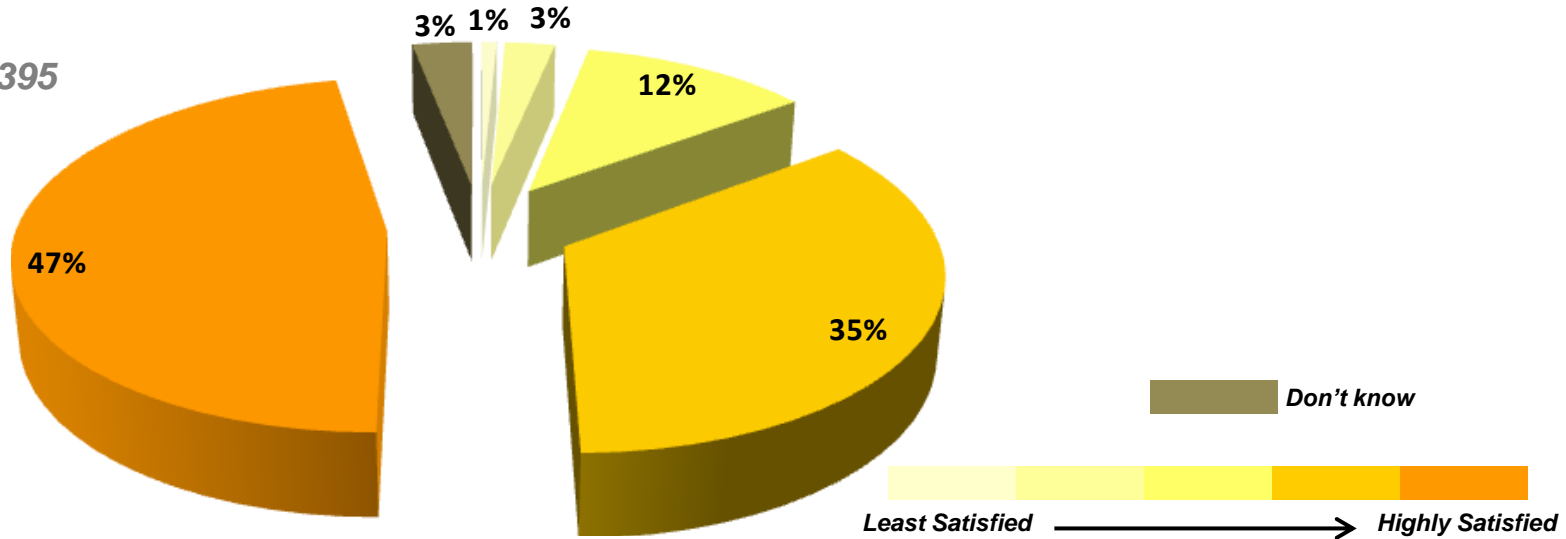
Sample Size – 395



Satisfaction with...

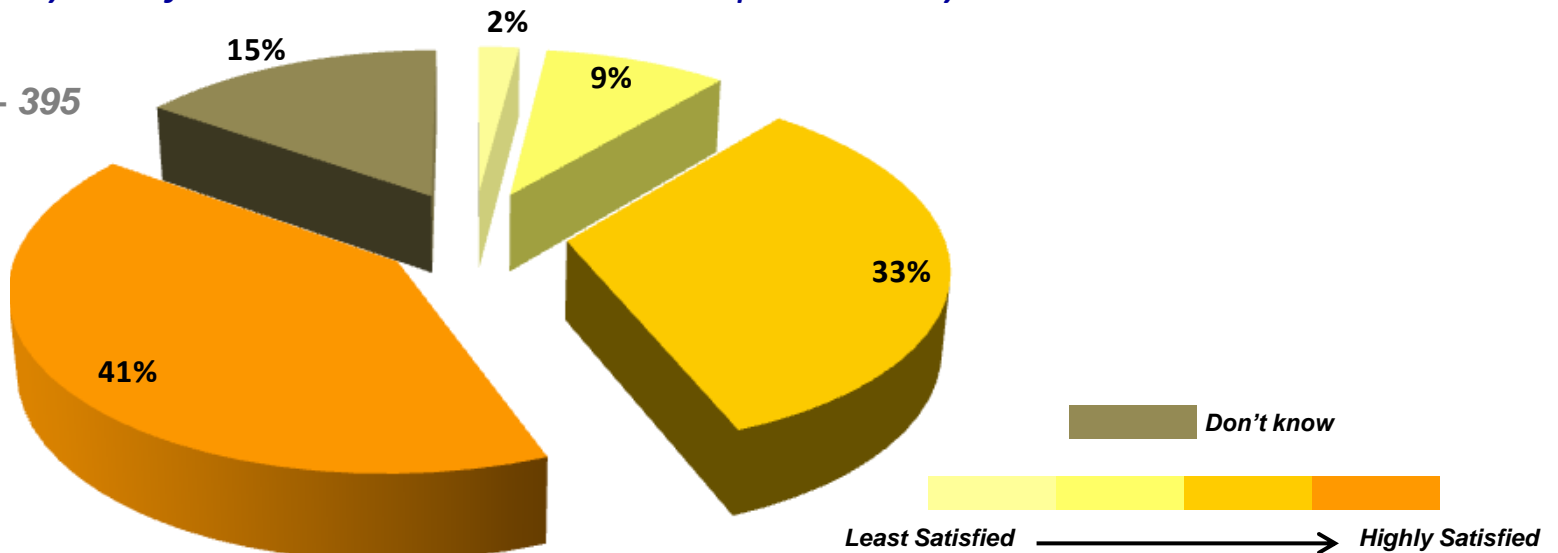
The availability of a letterbox where you can post your letters

Sample Size – 395



The accessibility to information about the services provided by MaltaPost

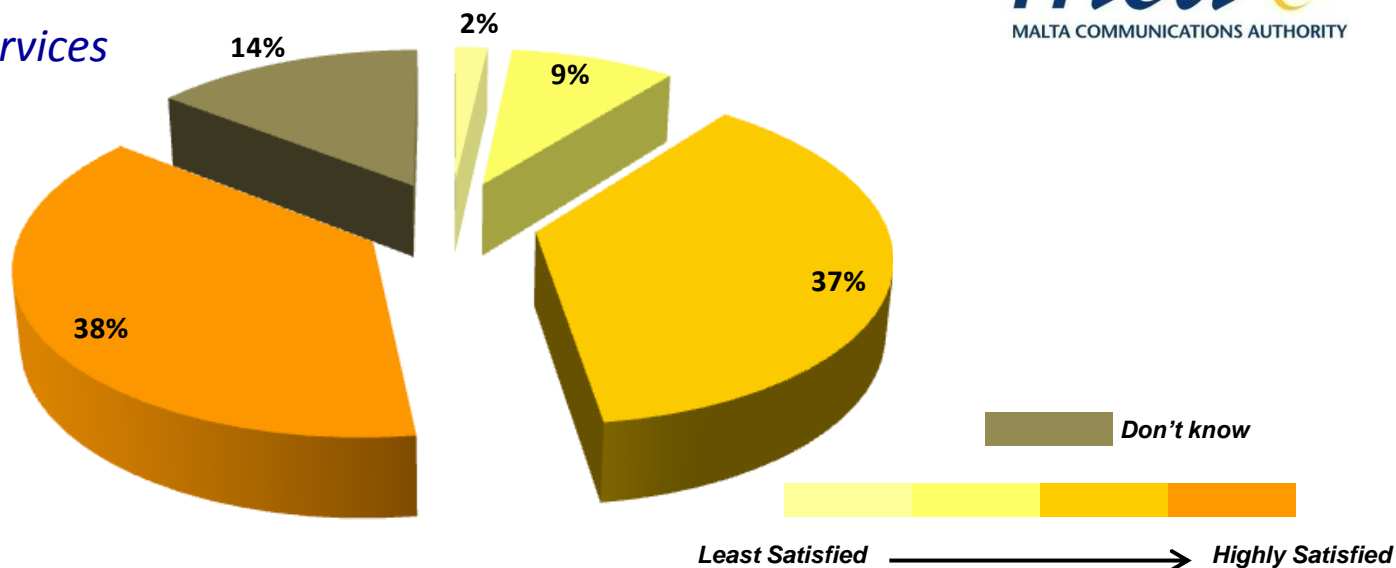
Sample Size – 395



Satisfaction with...

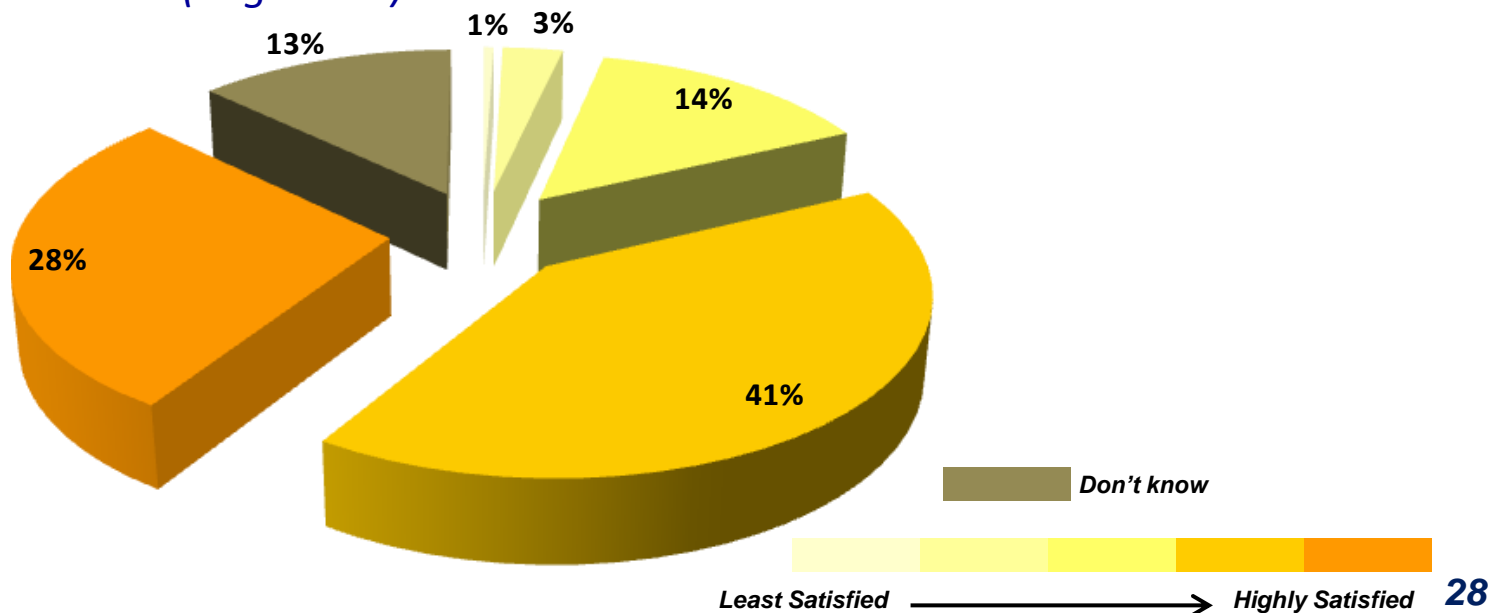
The range of postal services

Sample Size – 395



The prices of postal services (in general)

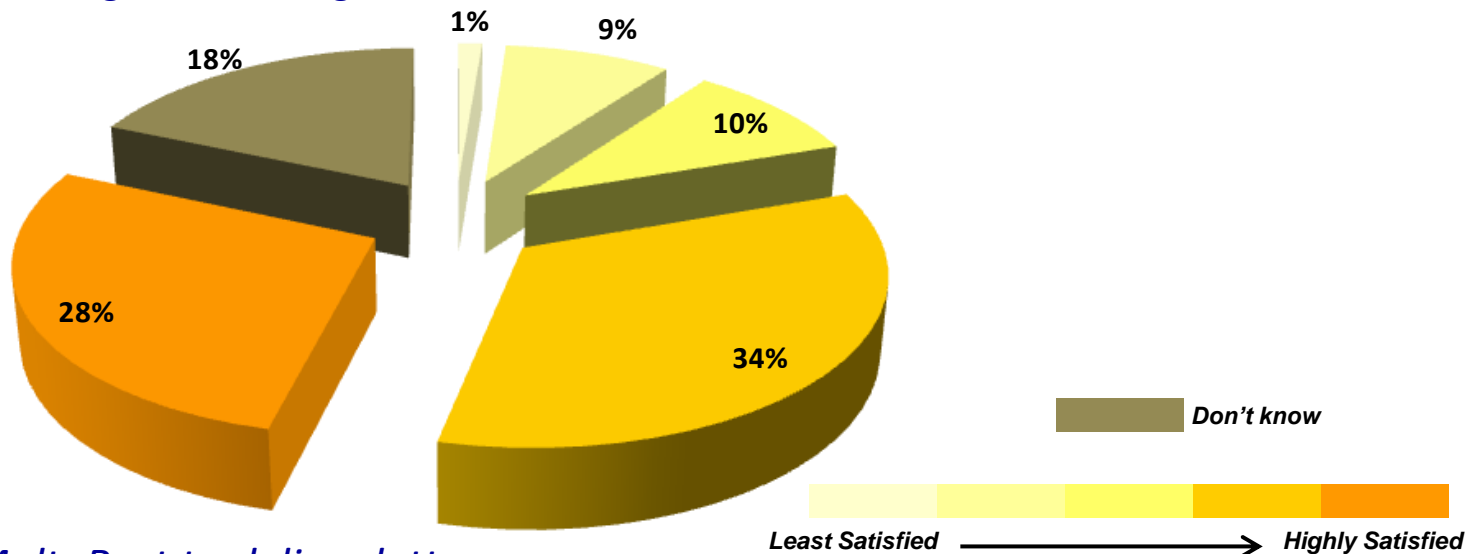
Sample Size – 395



Satisfaction with...

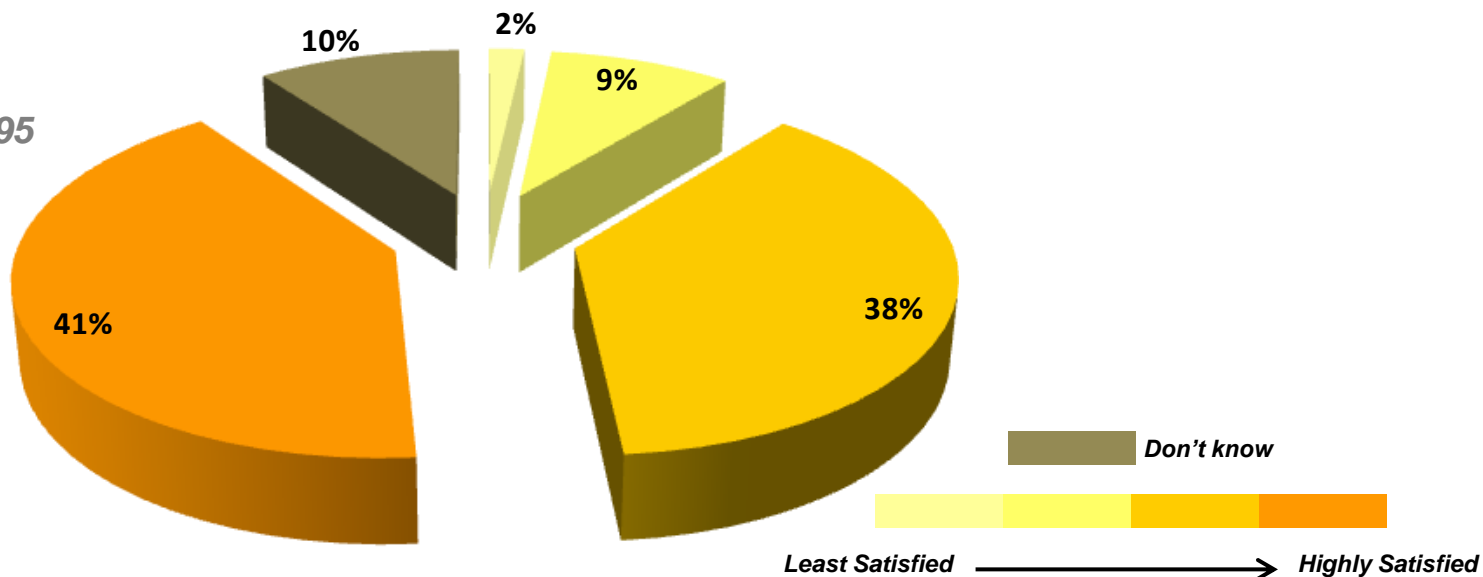
MaltaPost Offices' opening and closing times

Sample Size – 395



The time it takes MaltaPost to deliver letters

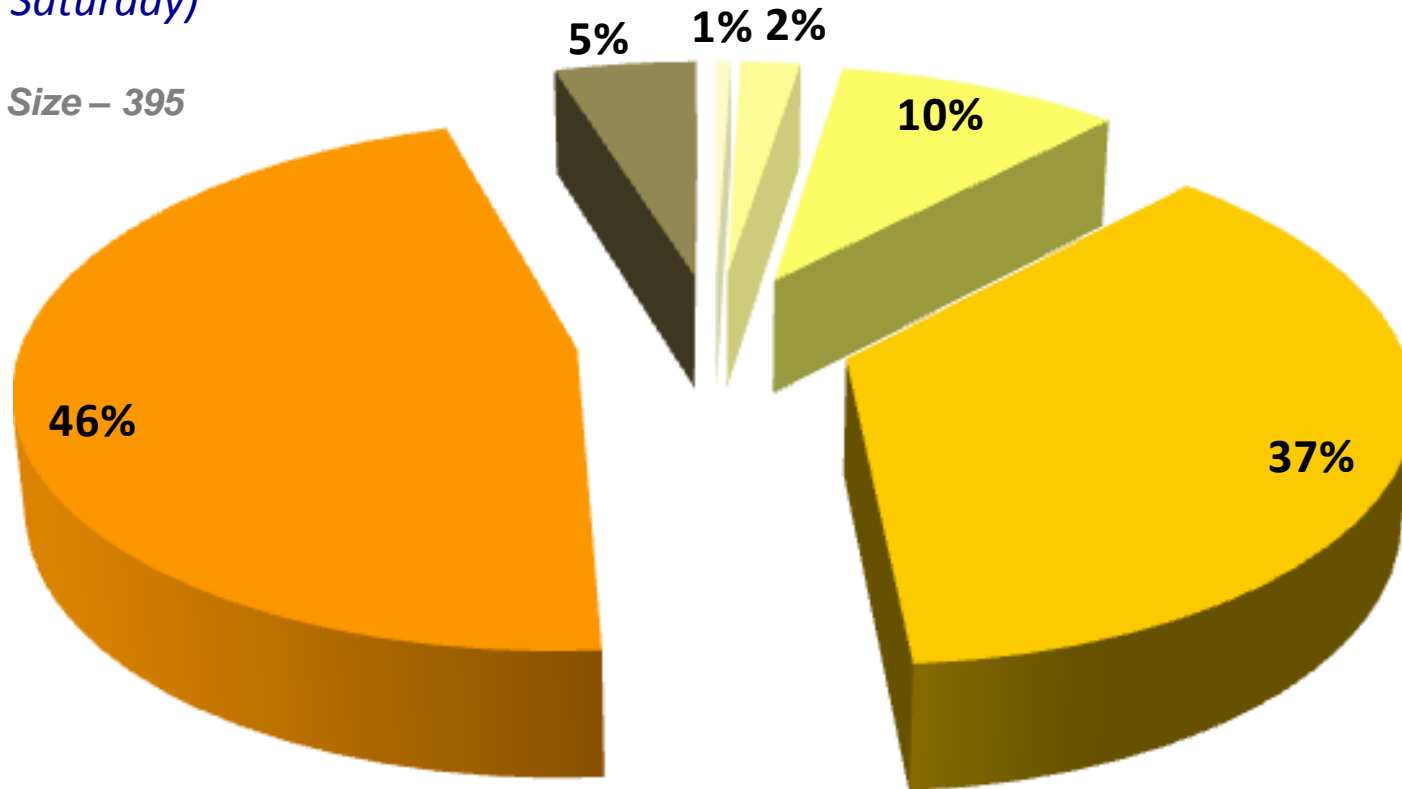
Sample Size – 395



Satisfaction with...

The latest collection time for next day delivery from your usual letterbox (latest time one can post a letter in order to be delivered the following day is 7pm from Monday to Friday & 3pm on Saturday)

Sample Size – 395

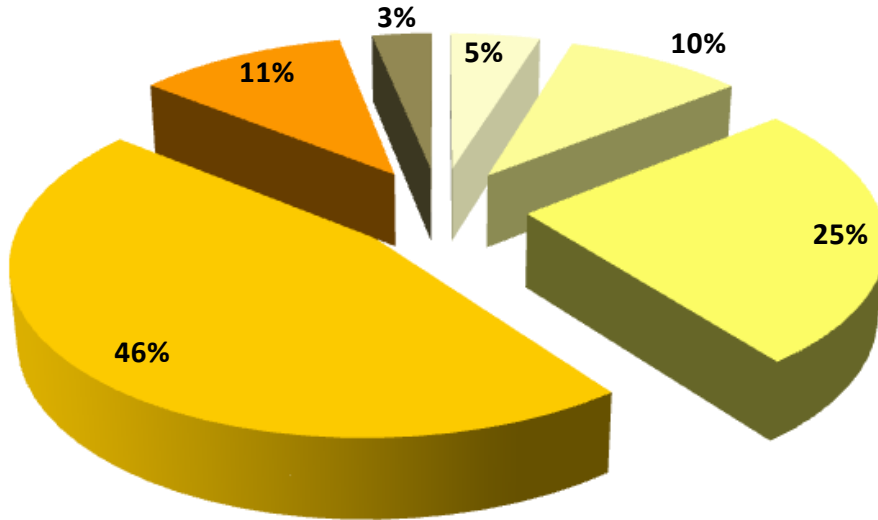


Don't know

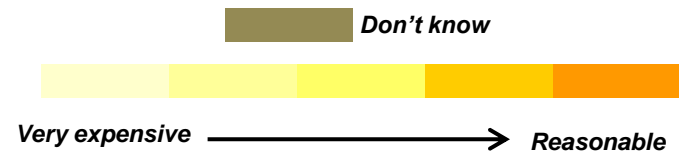
Least Satisfied → Highly Satisfied

MaltaPost's Parcel Service (1)

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

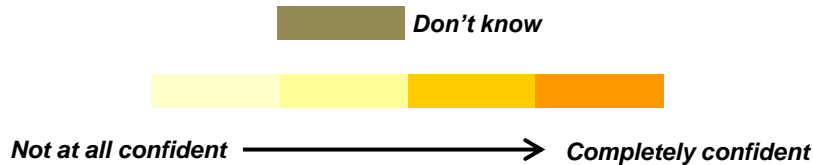
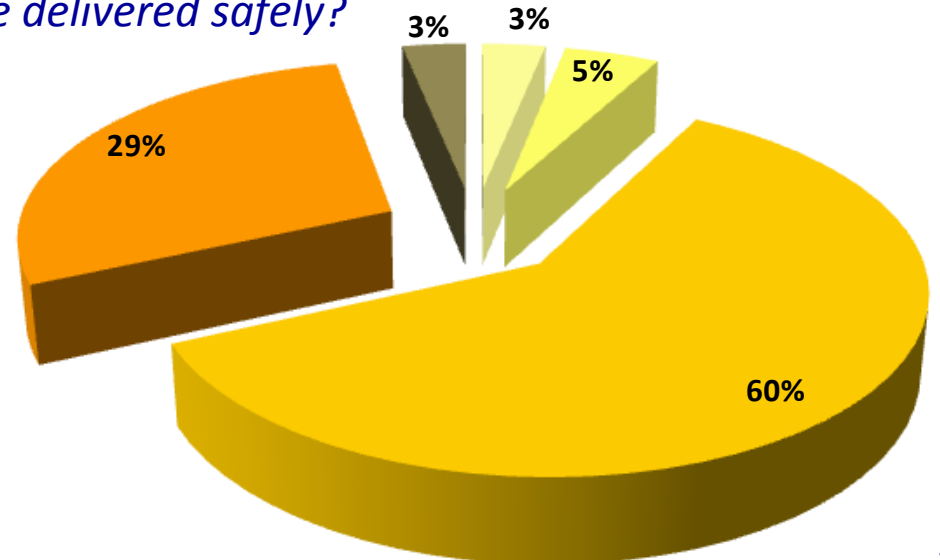


*Sample Size – 63
(businesses that send parcels)*



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

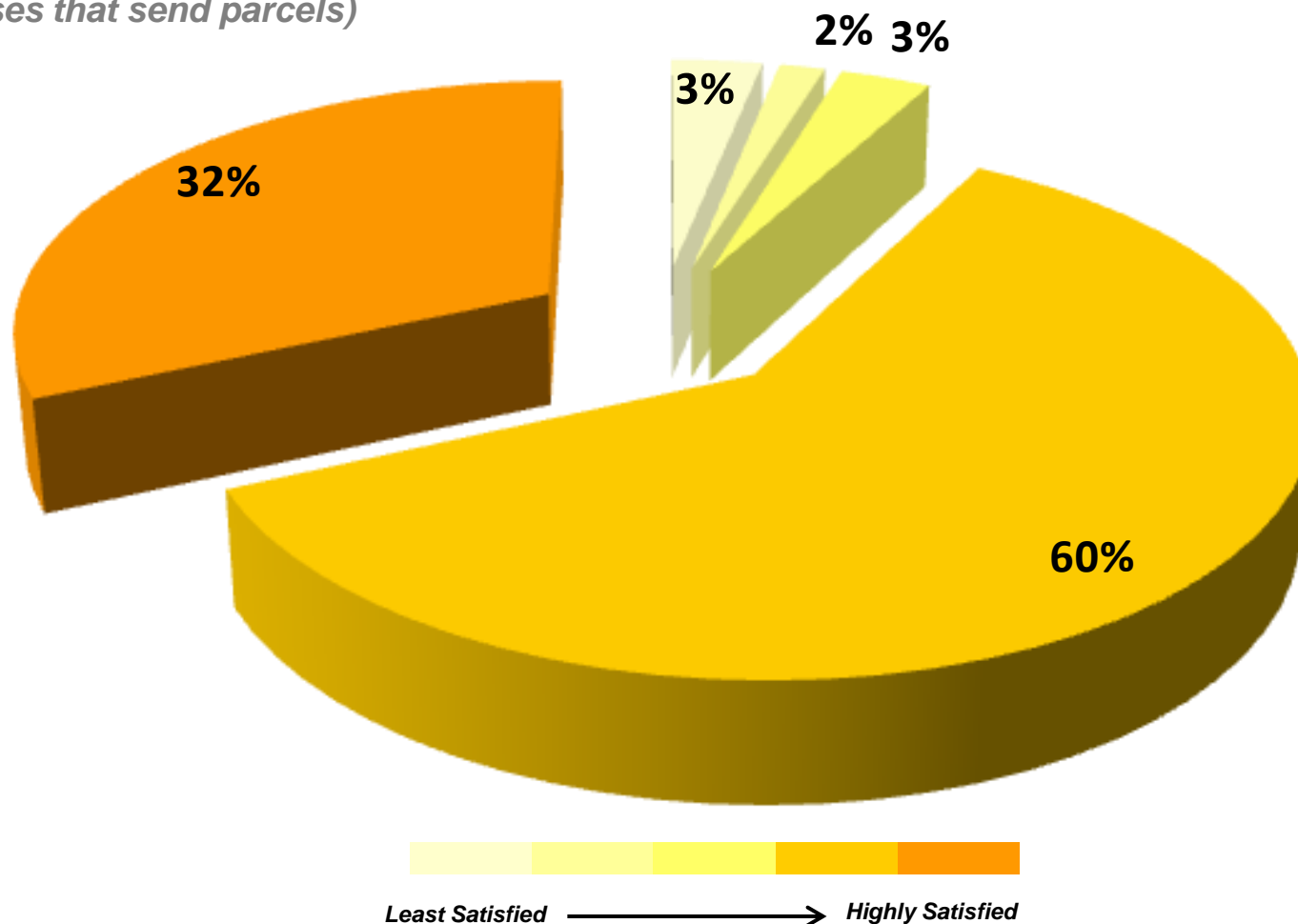
*Sample Size – 63
(businesses that send parcels)*



MaltaPost's Parcel Service (2)

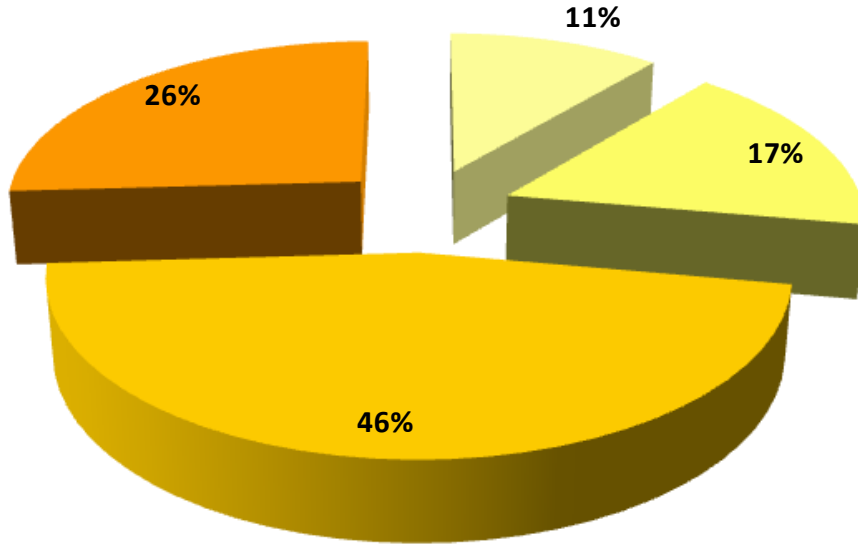
How satisfied are you with MaltaPost's parcel services ?

*Sample Size – 63
(businesses that send parcels)*



MaltaPost's Registered Mail Service (1)

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

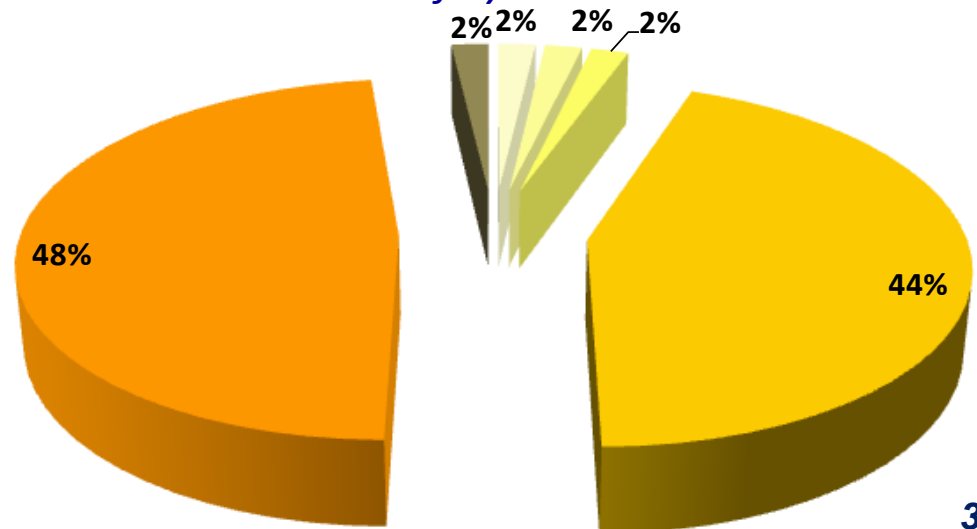
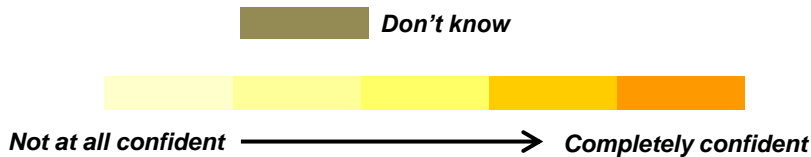


Sample Size – 54
(businesses that send registered mail)



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

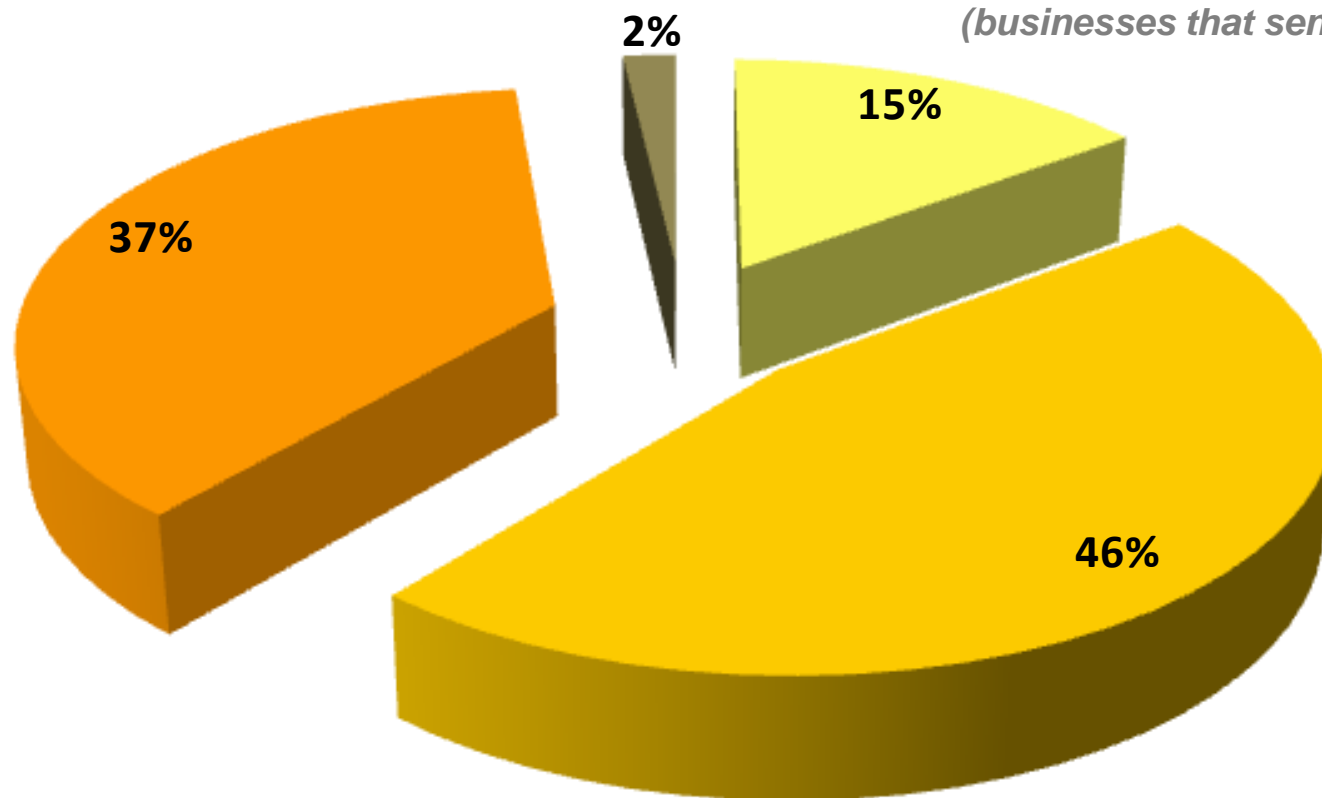
Sample Size – 54
(businesses that send registered mail)



MaltaPost's Registered Mail Service (2)

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

*Sample Size – 54
(businesses that send registered mail)*



Don't know

Least Satisfied → Highly Satisfied

Satisfaction with...

MaltaPost's Website

Sample Size – 395

1%

6%

8%

12%

73%

Although 73% of micro businesses claim to have never used the MaltaPost's website, this is less than the 85% claimed by households.

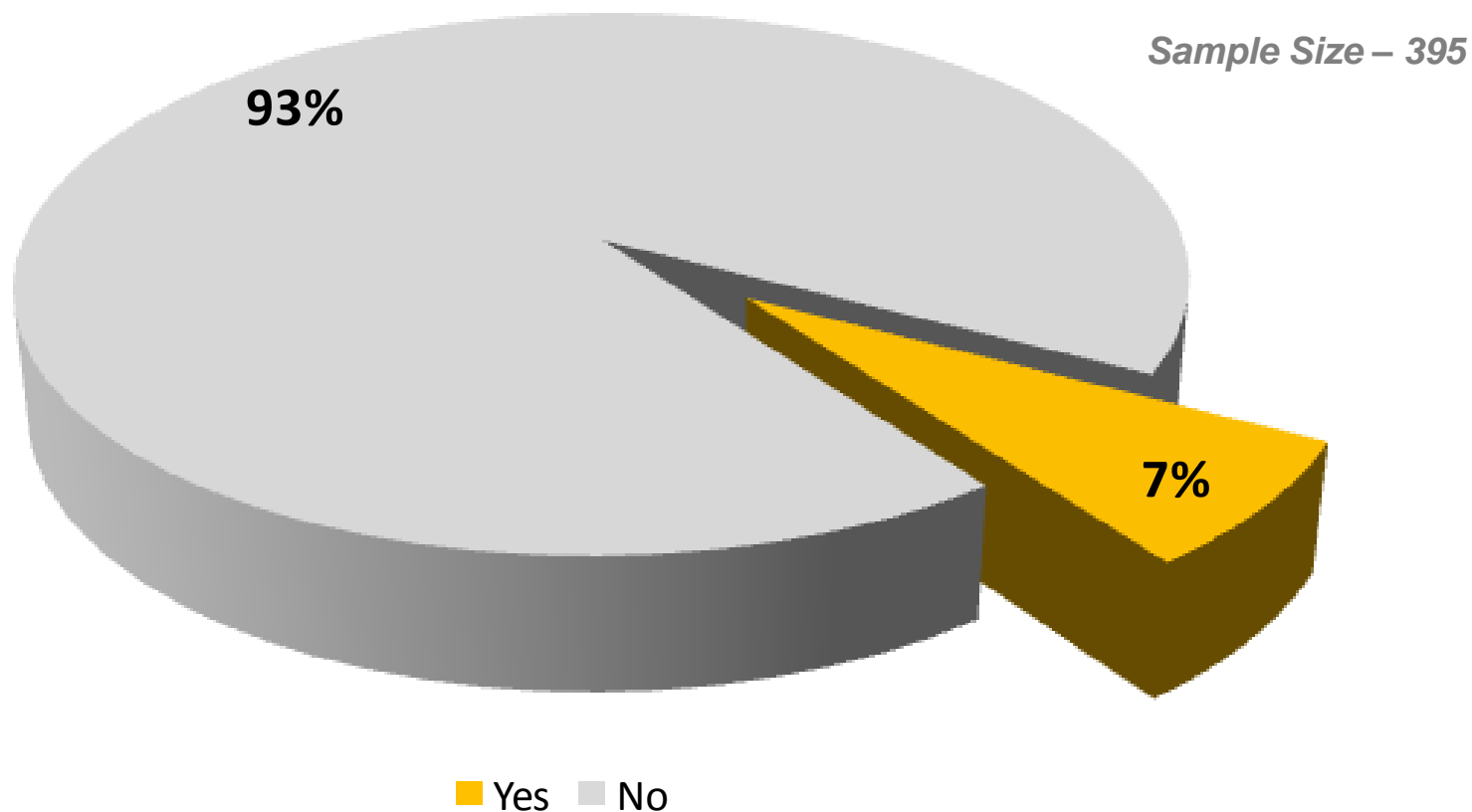
Results from the survey show that MaltaPost's website is mostly used as a source of information about postal products and prices, to track parcels and search for postcodes.

Never Used

Least Satisfied → Highly Satisfied

Complaint Issues (1)

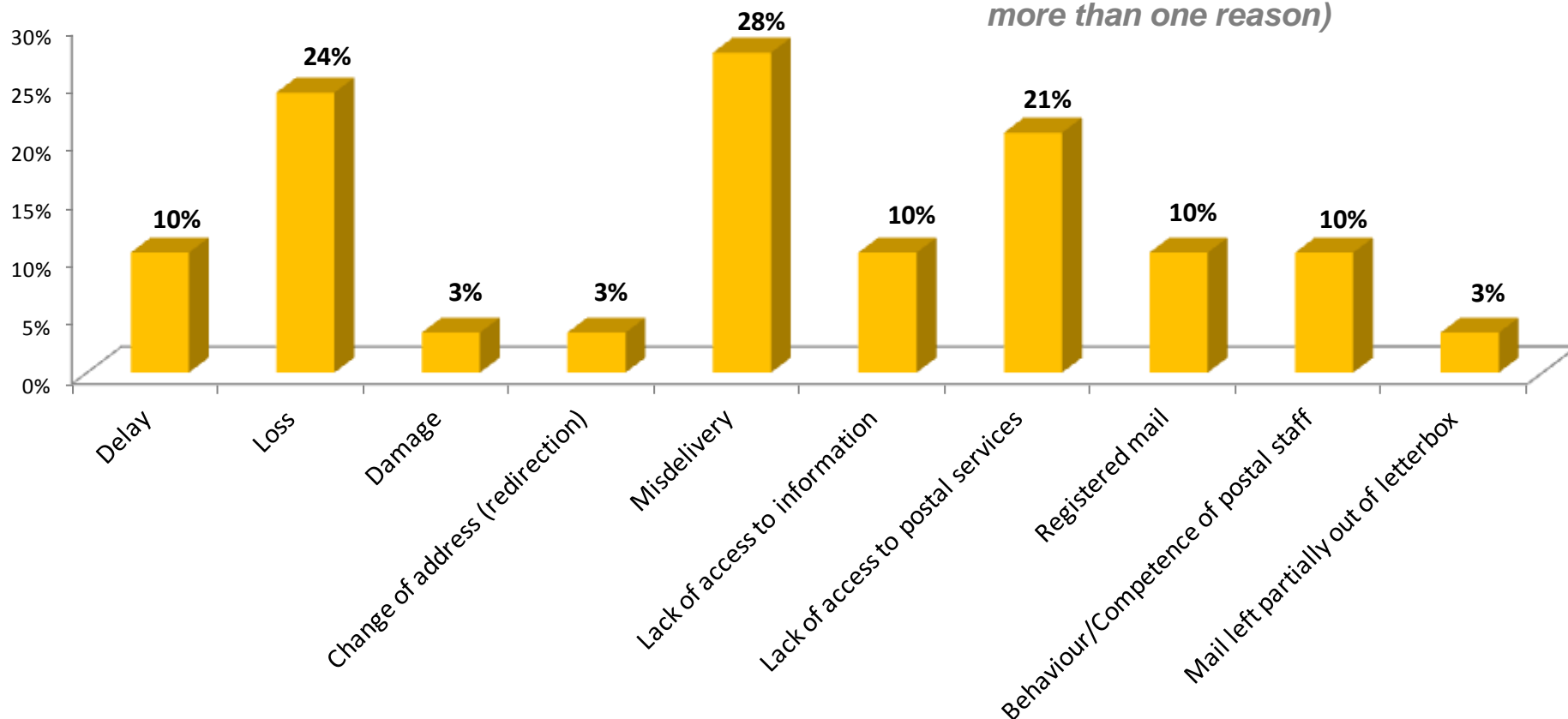
In the last 12 months, have you (or any member of your business) personally made a formal complaint to MaltaPost about any aspect of postal services?



Complaint Issues (2)

What was the complaint about?

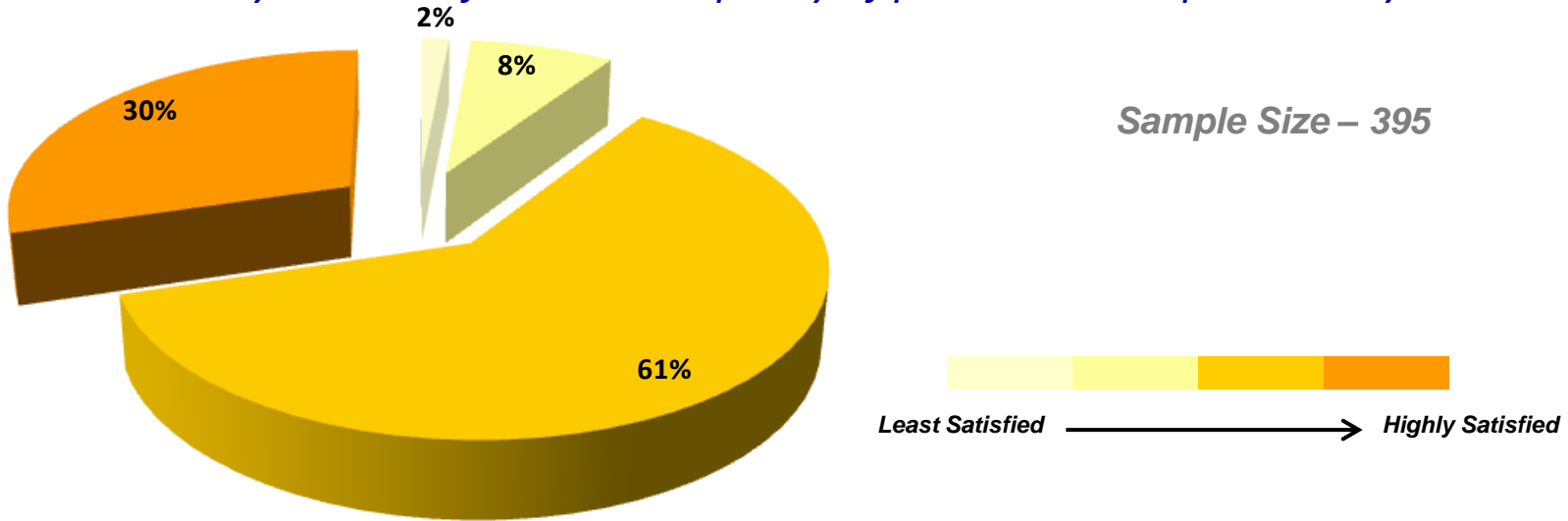
*Sample Size – 29
(each respondent could give more than one reason)*



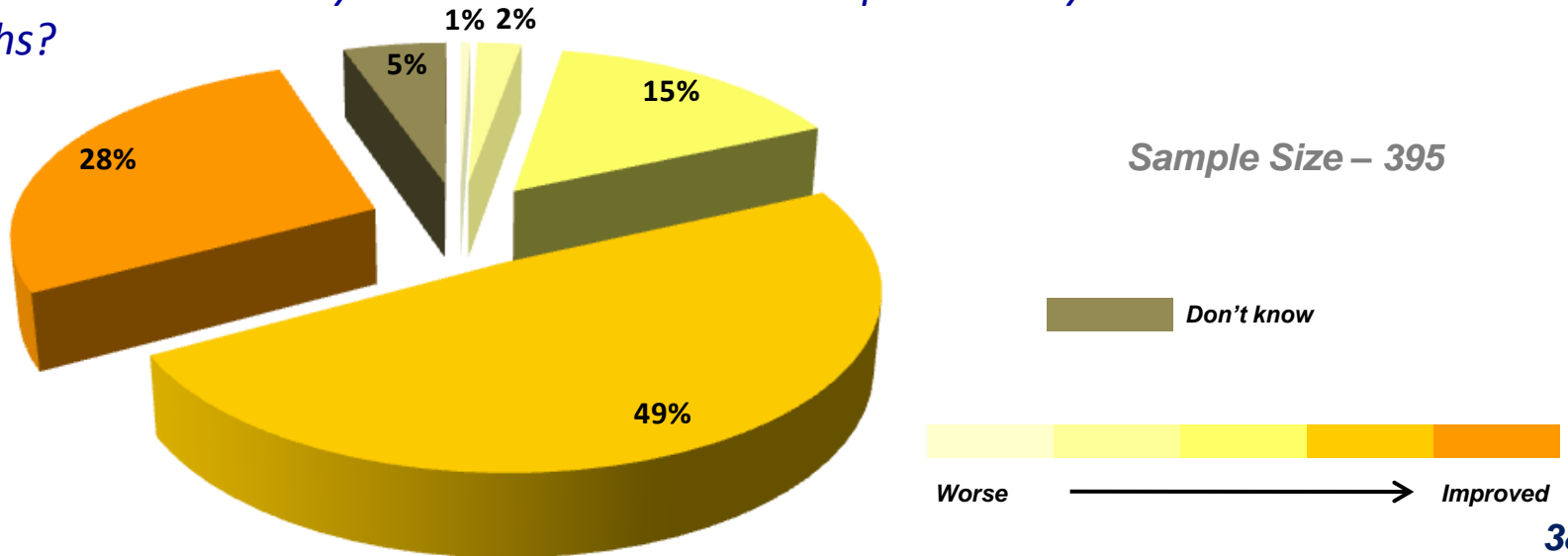
45% of businesses who had made a formal complaint with MaltaPost were satisfied or highly satisfied with the way their complaint had been handled.

Overall Satisfaction with MaltaPost Services

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



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





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