



Commission for
Communications Regulation

Media Release: 19/11/2013

For immediate release

ComReg publishes its 2013 Large Postal Users Survey

The Commission for Communications Regulation (ComReg) today published its Large Postal User Survey for 2013. Large postal users include large senders and/or large receivers of post and account for the majority of post sent and received in Ireland. Ipsos MRBI was commissioned by ComReg to undertake the survey.

The key findings from the **Large Postal Users Survey** are:

- All respondents use An Post as their primary postal provider with most aware of at least one other provider although, 40% of these postal users have used another provider in the past 12 months.
- The common experience across respondents is that there has been a slight decline in postal volumes (both sent and received) over the past two years
 - This is primarily driven by a slight decline in standard letters due to increased usage of alternatives (email in particular) but also due to general downturn in business
 - However respondents anticipate that volumes may remain the same or increase in the next two years
- According to respondents, about 20% of their mail sent/received has been replaced by electronic means over the past two years. Respondents believe there will be a slowdown in the rate of switching to electronic means, in coming years, for mail being sent.
- 80% of respondents intend to reduce their future postal spend.
- Increases in postal charges are identified as posing problems for these postal users who, in response, are reducing mail volumes sent or are switching to electronic methods, rather than finding an alternative provider.
- The survey reveals that cost effectiveness is the key motivator for e-substitution, although speed of delivery also has appeal. Legal barriers and customer profile are the barriers to further adoption.
- Digital postboxes have some appeal for respondents, although this is limited due to a perception of customer preference for postal communications.
- The full survey report (ComReg Document No. 13/107) can be found on ComReg's website at www.comreg.ie

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Information for Editors:

- In consultation with ComReg, Ipsos MRBI identified possible large users of postal services
- This list consisted of financial institutions, utilities, state bodies/government departments, charities, hospitals, universities, and others
- Ipsos MRBI contacted each organisation to identify the individual with responsibility for managing postal services and recruit them for the research
- The research involved two elements:
 - i. A self-completion questionnaire to identify postal volumes to confirm whether a large postal user or not
 - ii. A face-to-face interview to provide further context on that organisation's current and future usage of postal services
- 10 interviews were conducted between June and August 2013
 - 8 organisations were categorised as large senders of post
 - 9 organisations were categorised as large receivers of post
- Though only 10 interviews were conducted, this accounts for a reasonable percentage of the population of Large Postal Users. However, as Large Postal Users have significantly different relative postal volumes sent/received, some caution is required when interpreting the results.
- Ipsos MRBI's surveys of SMEs and consumers on their usage of post have already been published by ComReg as Documents 13/67a and 13/67b.