

# Postal Services Survey

## Business

# Presentation Format

- Introduction
  - Research Methodology
  - Sample Profile
- Findings
- Management Summary

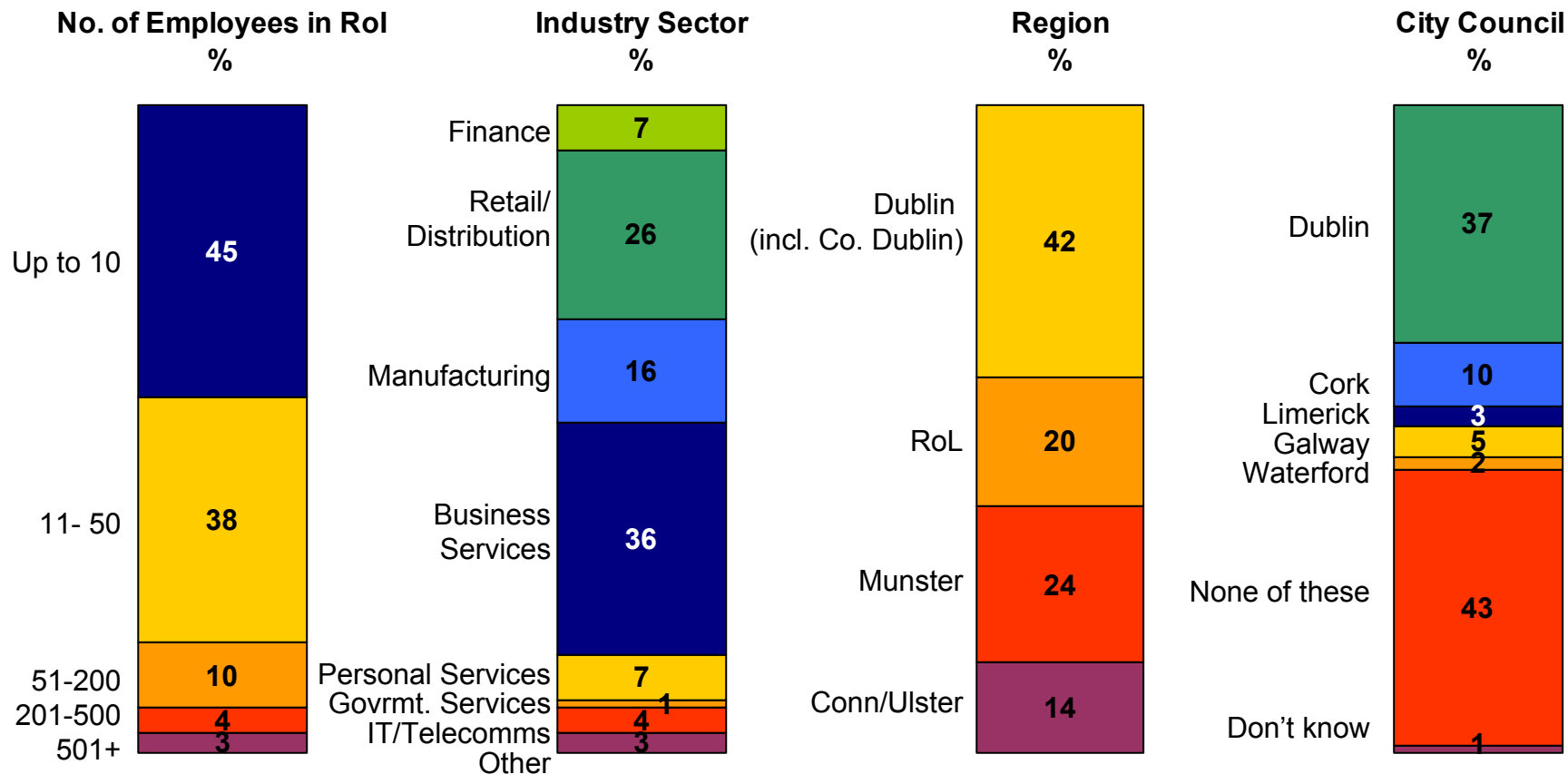
# Introduction

# Research Methodology

- Telephone survey conducted by TNS mrbi via CATI (Computer Aided Telephone Interviewing).
- 506 interviews were conducted amongst businesses in the Republic of Ireland.
- Quotas were set on company size and region with weighting applied at the analysis stage.
- All interviews were conducted with the person in the company responsible for incoming and outgoing post and general dealings with the post office.
- Fieldwork was conducted between 31<sup>st</sup> July – 12<sup>th</sup> August 2003.

# Company Profile

Base: All Respondents: 506

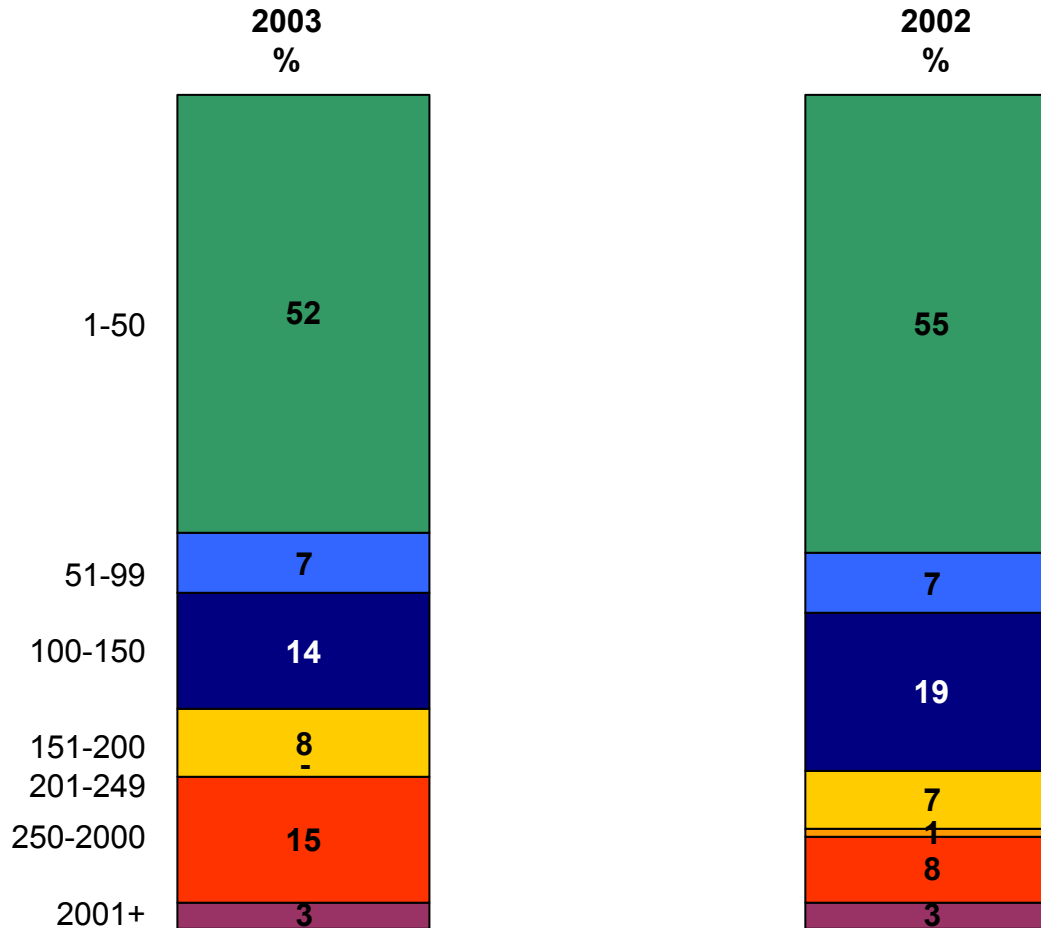


# Findings

# Mail Sending Patterns

# Weekly Volume Of Letters Sent

Base: All Respondents: 506



Average no. of letters sent 420





# Average Weekly Volume Of Letters Sent X Company Type

Base: All Respondents: 506

## By Number of Employees

1 – 10	155
11 – 50	303
51 – 200	886
201 – 500	1526
501+	2825

## By Sector

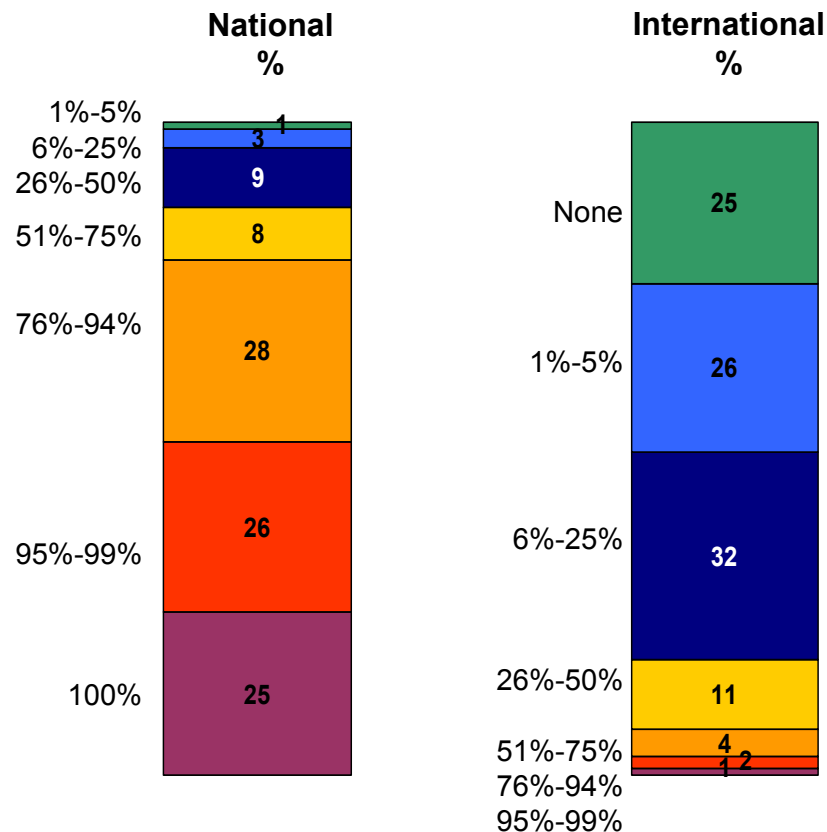
Finance*	1416
Retail/Distribution	368
Manufacturing	252
Business Services	399
Personal Services*	480
Government Services*	728
IT/Telecomms*	258
Other*	291

*Personal services: hotels/catering/ pubs, recreational services, health/ veterinary services*  
*Government services: postal/ courier services, education, public administration and defense*

# Proportion Of Mail Sent To National Vs. International Destinations

Base: All Respondents: 506

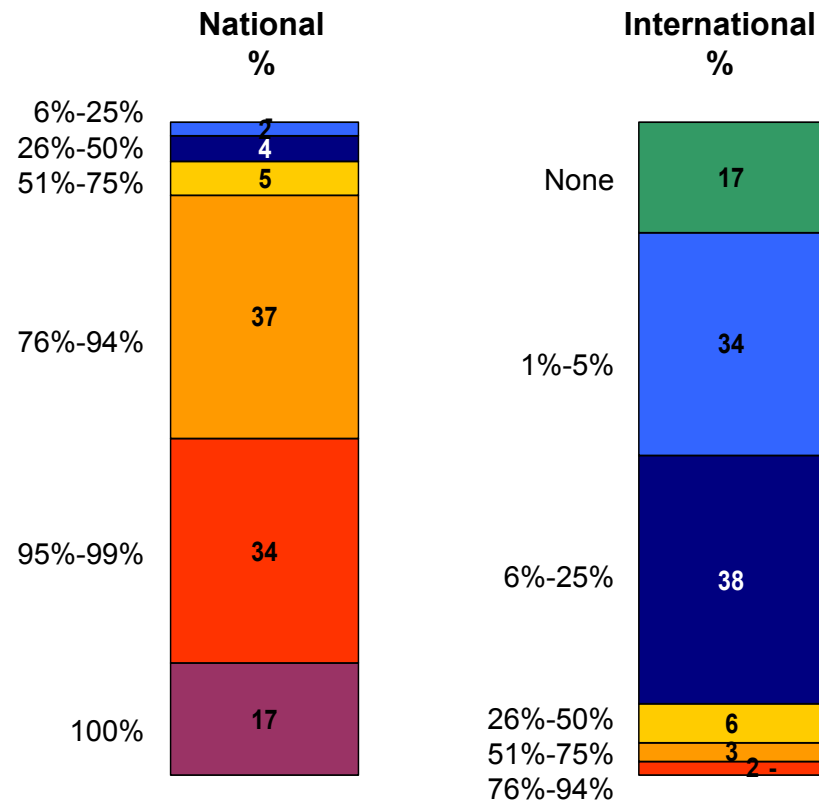
Respondent Based



Average 85

15

Volume Weighted



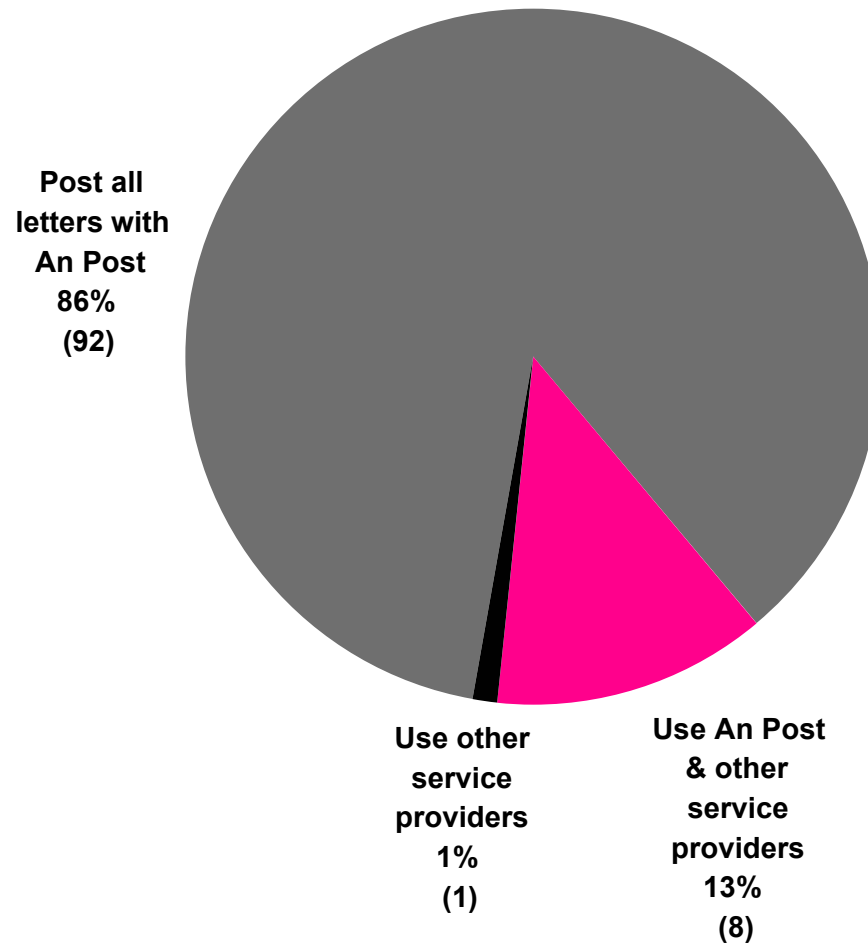
85

15



# Postal Service Providers Used

Base: All Respondents: 506



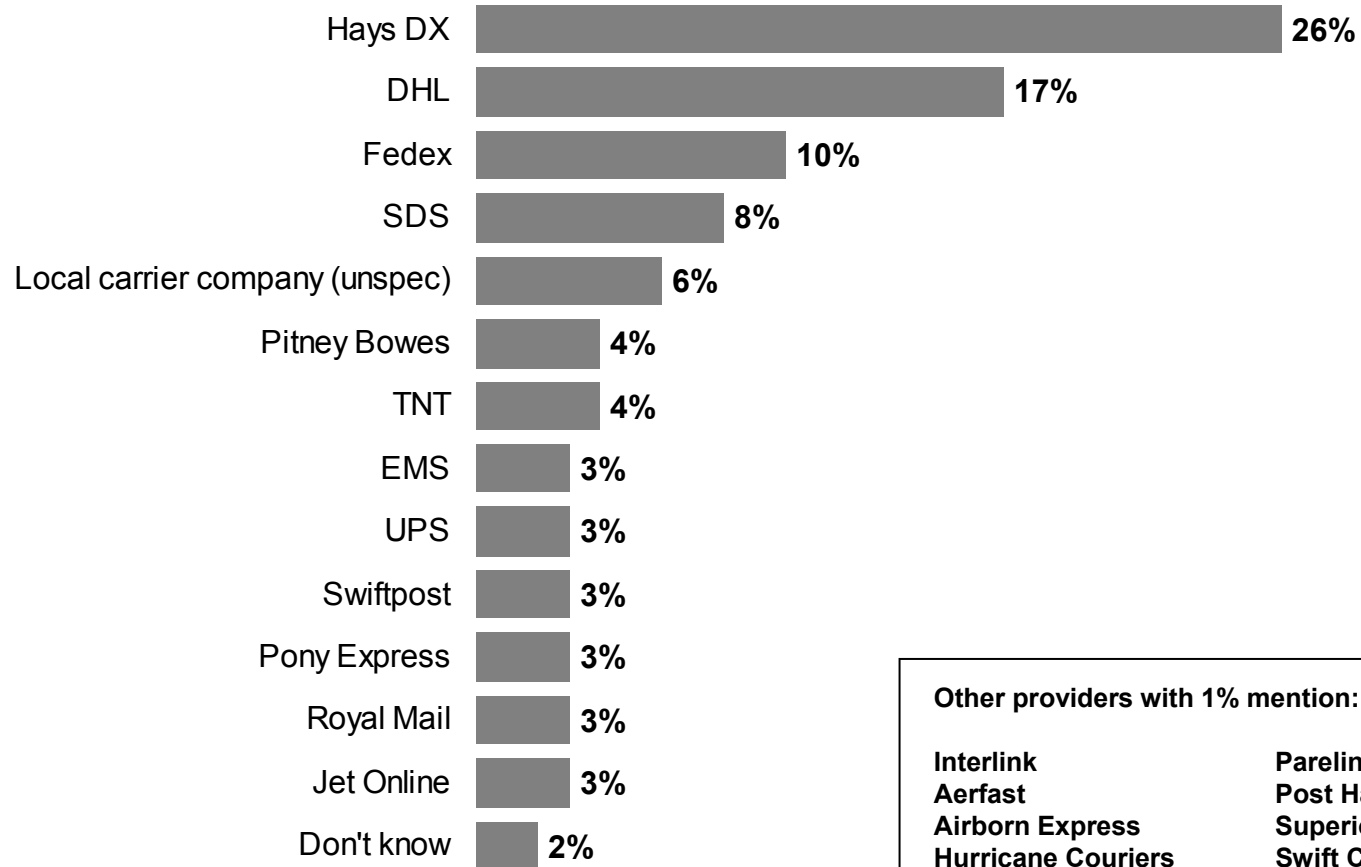
# Postal Service Providers Used X Company Type

Base: All Respondents: 506

	Weekly Volume Sent			Sector							
	1-50	51-249	250+	Finance	Retail/ Dist.	Manu.	Business Services	Personal Services	Govt. Services	IT/Tele- comms	Other
	(182) %	(159) %	(162) %	(37)* %	(130)* %	(82)* %	(182)* %	(36)* %	(5)* %	(20)* %	(14)* %
An Post only	89	84	81	73	96	93	81	78	65	74	100
An Post & other providers	10	16	19	27	9	7	19	16	35	17	-
Other providers	1	-	-	-	4	-	-	7	-	9	-

# Other Postal Service Providers Used

Base: All Those Who Use Other Providers: 72



#### Other providers with 1% mention:

Interlink	Pareline
Aerfast	Post Haste Despatch
Airborn Express	Superior
Hurricane Couriers	Swift Couriers
Olympus	

# Service For Which Other Providers Are Used

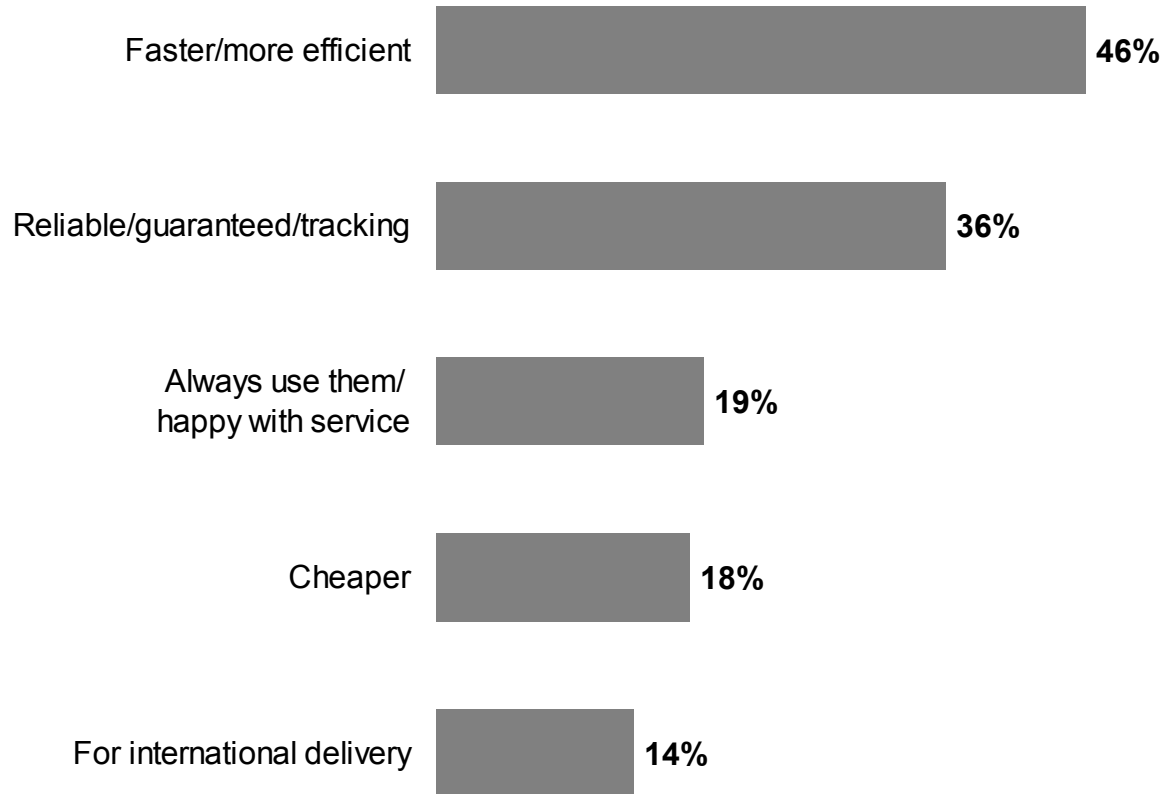
Base: All Those Who Use Other Providers: 72

\* Raw Numbers \*

	<b>Any other supplier</b> (72)	<b>Hays DX</b> (18)	<b>DHL</b> (12)	<b>Fedex</b> (7)	<b>SDS</b> (6)	<b>Pitney Bowes</b> (3)	<b>TNT</b> (3)	<b>EMS</b> (2)	<b>UPS</b> (2)	<b>Swift post</b> (2)	<b>Pony Express</b> (2)	<b>Royal Mail</b> (2)
Letter post within the state (incl. N.I.)	29	8	3	-	6	3	1	2	-	2	2	2
International letter post – Britain	28	7	9	4	2	3	1	1	1	-	-	-
International letter post – Europe	21	2	10	3	2	3	-	-	1	-	-	-
International letter post – USA	21	-	9	6	2	3	-	-	1	-	-	-
International letter post – Rest of World	20	-	8	6	2	3	-	-	1	-	-	-
Document exchange	20	12	6	2	-	-	-	-	-	-	-	-

# Reasons For Using Other Postal Service Providers - Spontaneous

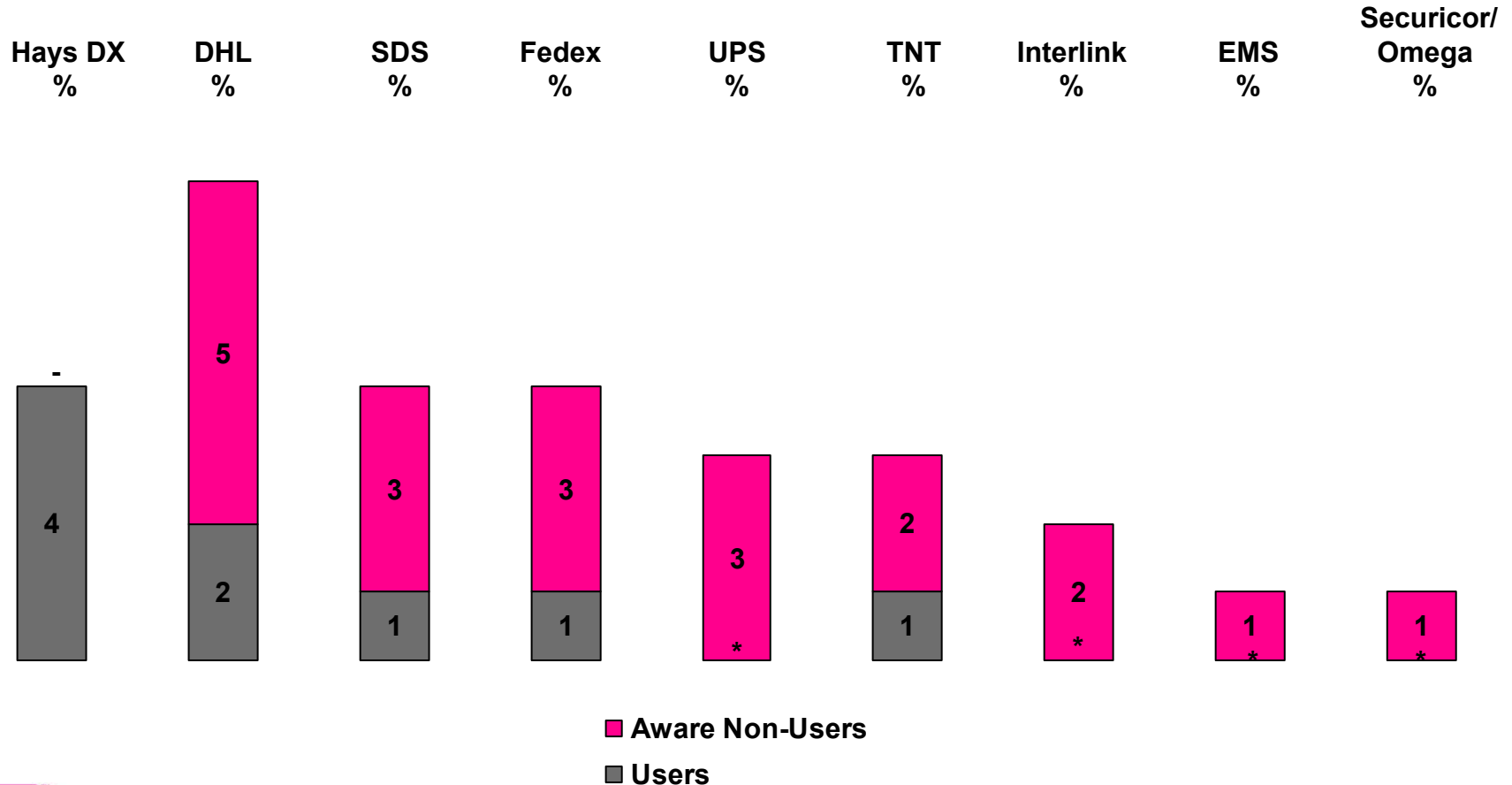
Base: All Those Who Use Other Providers: 72



# Awareness Of Other Companies That Could Be Used For Sending Letters Besides An Post

Base: All Respondents: 506

84% could not name any other provider





# Awareness Of Services Provided By Other Companies

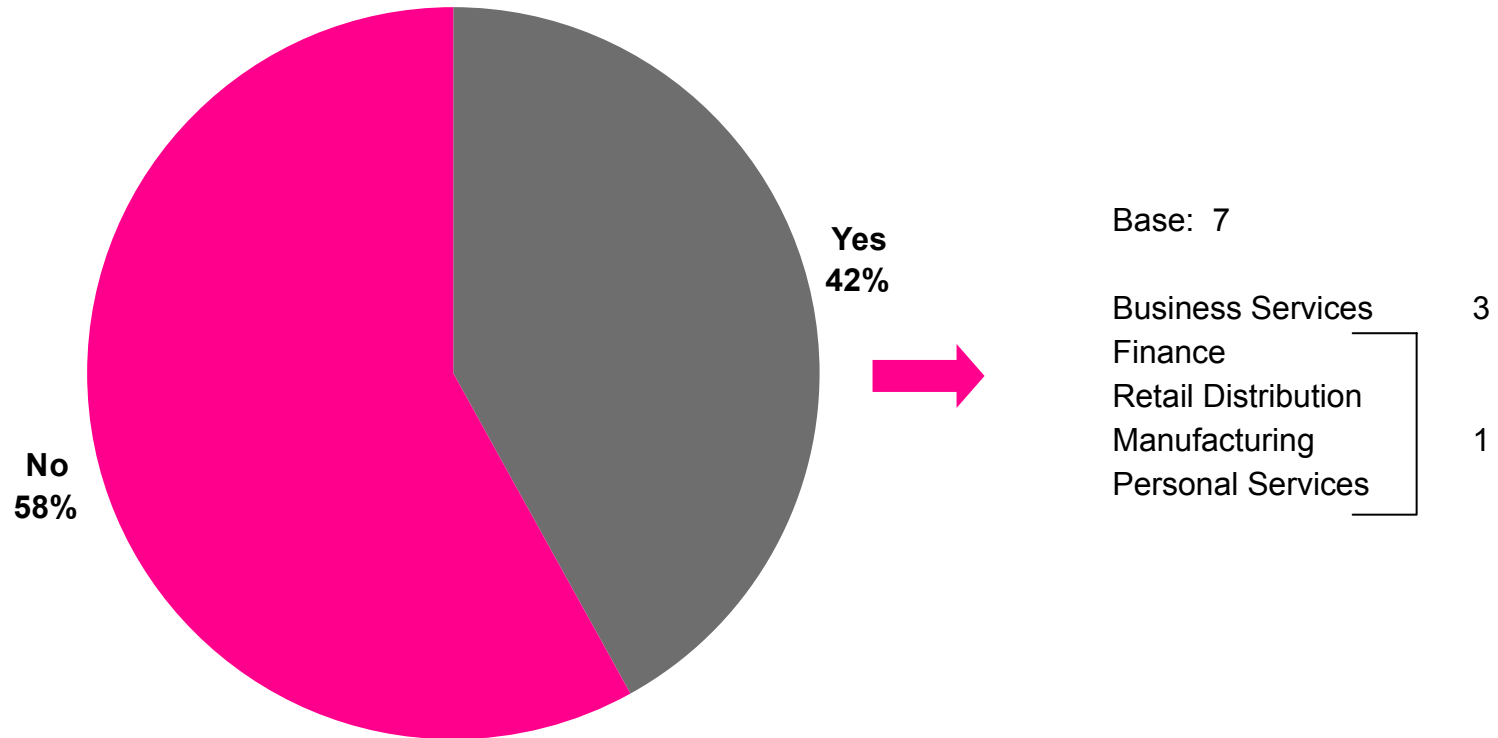
Base: All Those Aware Of Companies Other Than An Post: 99

\* Raw Numbers \*

	<b>DHL</b>	<b>SDS</b>	<b>UPS</b>	<b>TNT</b>	<b>Fedex</b>	<b>TNT</b>
	(24)	(16)	(14)	(10)	(14)	(10)
Letter post within the state (incl. N.I.)	11	14	5	7	4	7
International letter post – Britain	20	10	8	7	10	7
International letter post – Europe	20	10	8	8	9	8
International letter post – USA	20	6	9	7	10	7
International letter post – Rest of World	18	6	8	7	9	7
Document exchange	10	3	6	4	4	4

# Usage Of An Post's Direct Mail Service

Base: All Those Sending 2001+ Letters A Week: 40



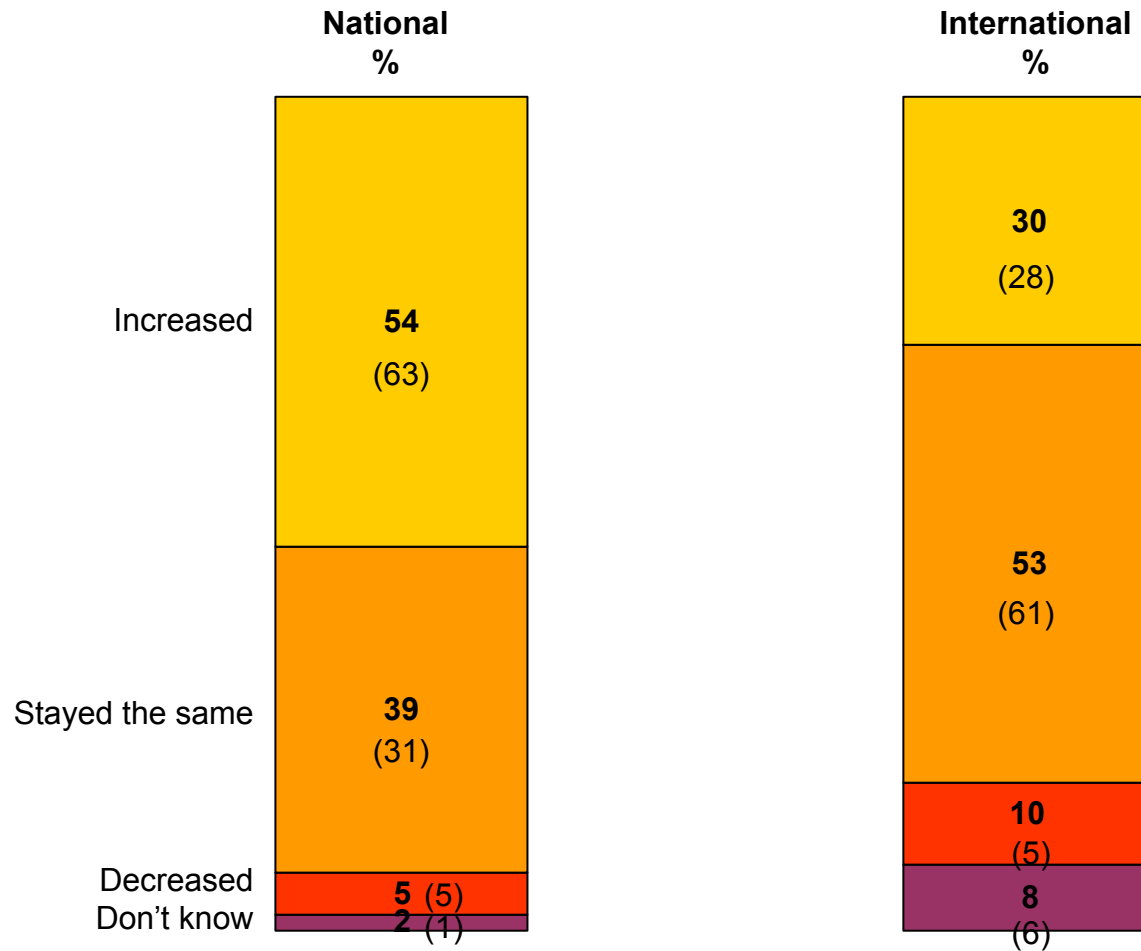
# Intention Of Using An Post's Direct Mail Service In The Next 12 Months

Base: All Those Sending 100-2000 Letters A Week: 262

	Total (262)	Weekly Volume Sent		Sector							
		100-249 (117)	250-2000 (145)	Finance (22*)	Retail/ Dist. (65)	Manu. (49*)	Business Services (86)	Personal Services (21*)	Govt. Services (3*)	IT/Tele- comms (9*)	Other (10*)
	%	%	%	%	%	%	%	%	%	%	%
Yes	40	47	29	26	45	34	43	39	15	38	32
No	50	45	57	66	43	63	46	49	85	56	68
Don't know	10	8	14	8	12	4	12	13	-	6	-

# Trends In The Volume Of Letter Post Sent Each Week

Base: All Those Sending 100+ Letters A Week: 279



# Reasons For Decrease In Letter Post

## Base: All Those Experiencing A Decrease

\* Raw Numbers \*

### National Letter Post

Base: 11

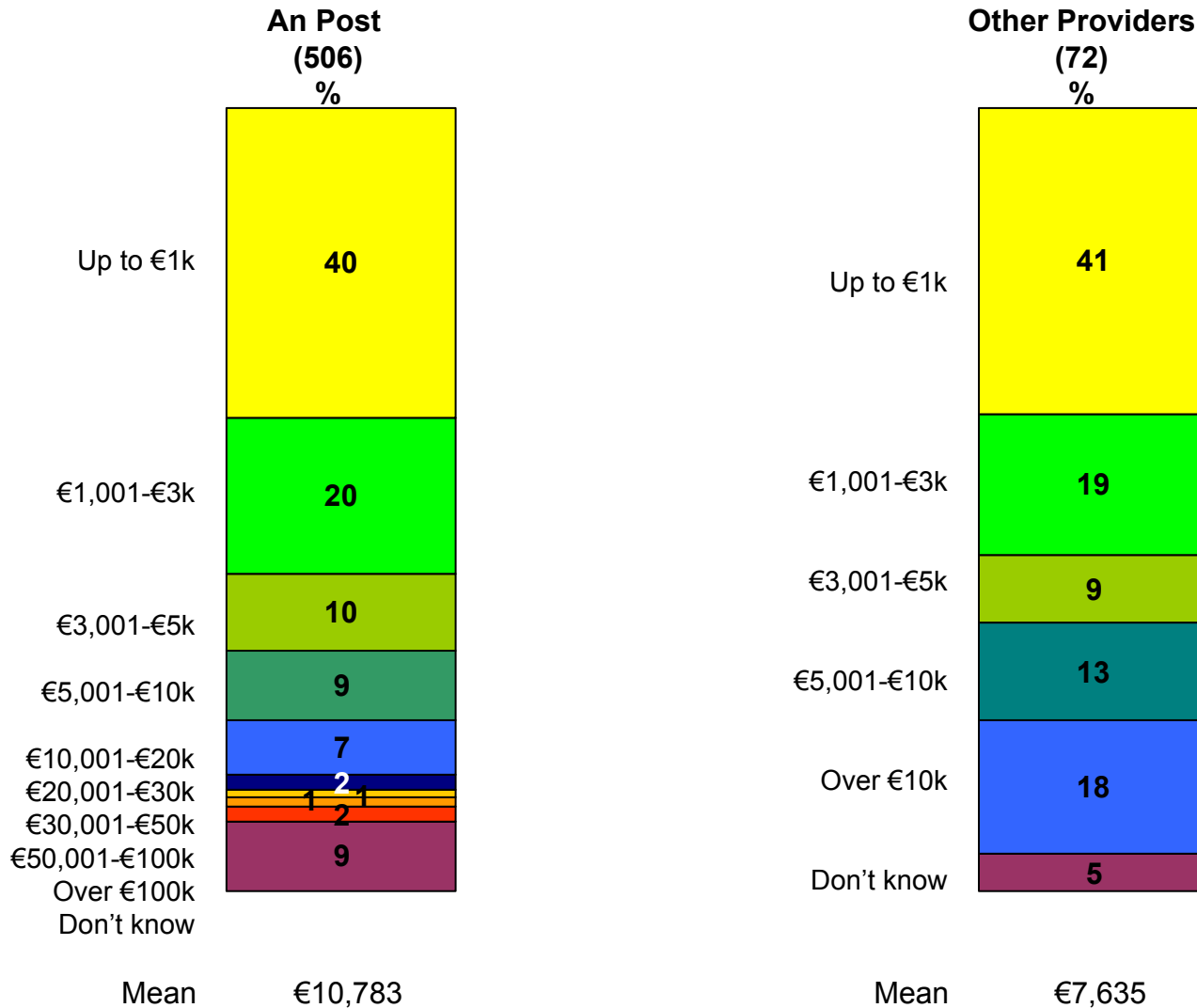
Email/electronic transfer	7
Fax	2
Change in business	1
Outsource our bills & invoices	1

### International Letter Post

Base: 20

Change in business/business issue/ less customer demand	10
Email/electronic transfer	10
Duty free going has affected business	1

# Annual Spend On Letter Post Services



# Average Annual Spend X Company Type

Base: All Respondents: 506

An Post	
By Weekly Volume	
	€
1 – 50	1,000
51 – 249	7,820
250+	44,461

By Sector	
	€
Finance*	27,829
Retail/Distribution	5,085
Manufacturing	6,659
Business Services	13,132
Personal Services*	16,667
Government Services*	13,232
IT/Telecomms*	13,324

Other Providers	
By Weekly Volume	
	€
1 – 50	1,648
51 – 249	3,580
250+	26,986

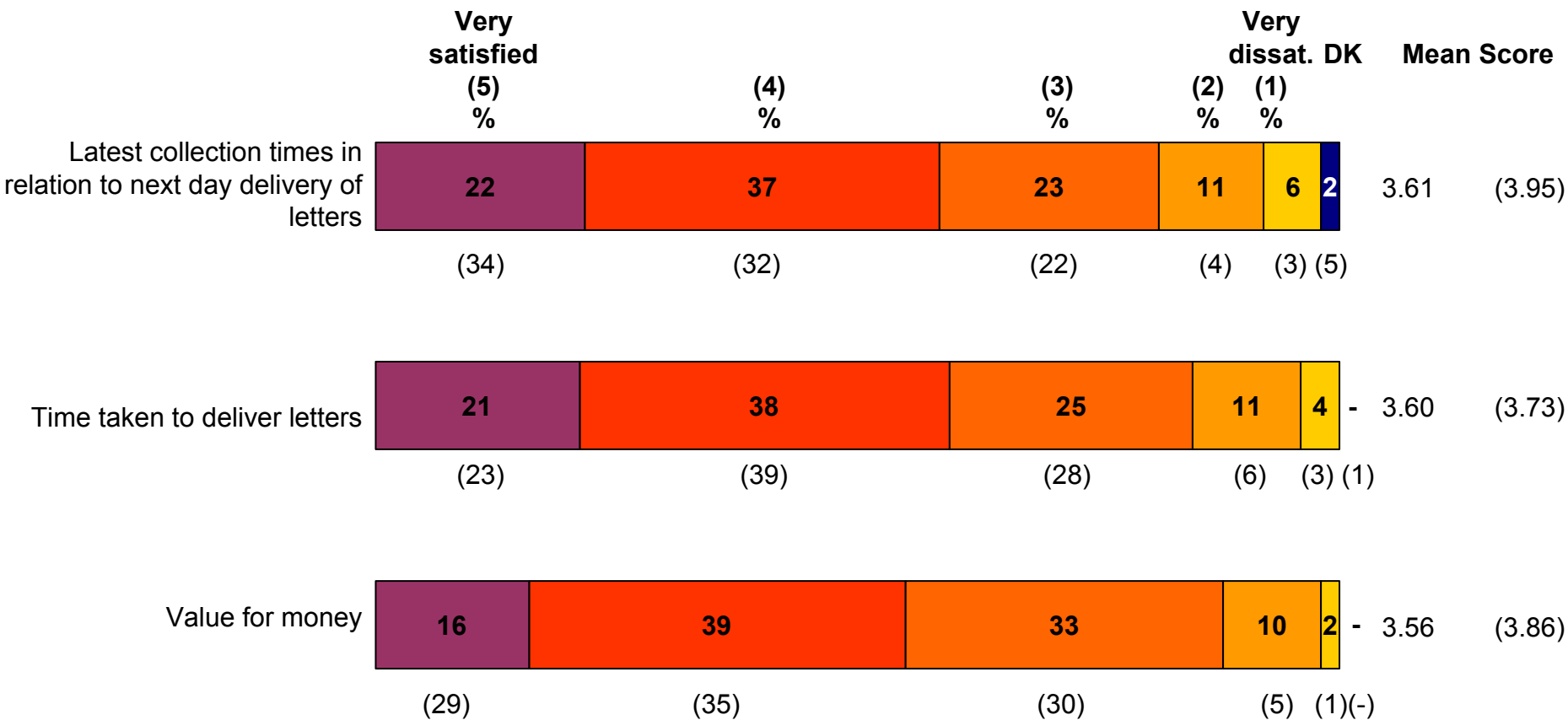
By Sector	
	€
Finance*	18,926
Retail/Distribution*	6,229
Manufacturing*	3,763
Business Services*	8,569
Personal Services*	655
Government Services*	-
IT/Telecomms*	946

# Attitudes & Satisfaction Levels With An Post



# Satisfaction With Services Provided By An Post

Base: All Those Sending 100+ Items A Week: 279



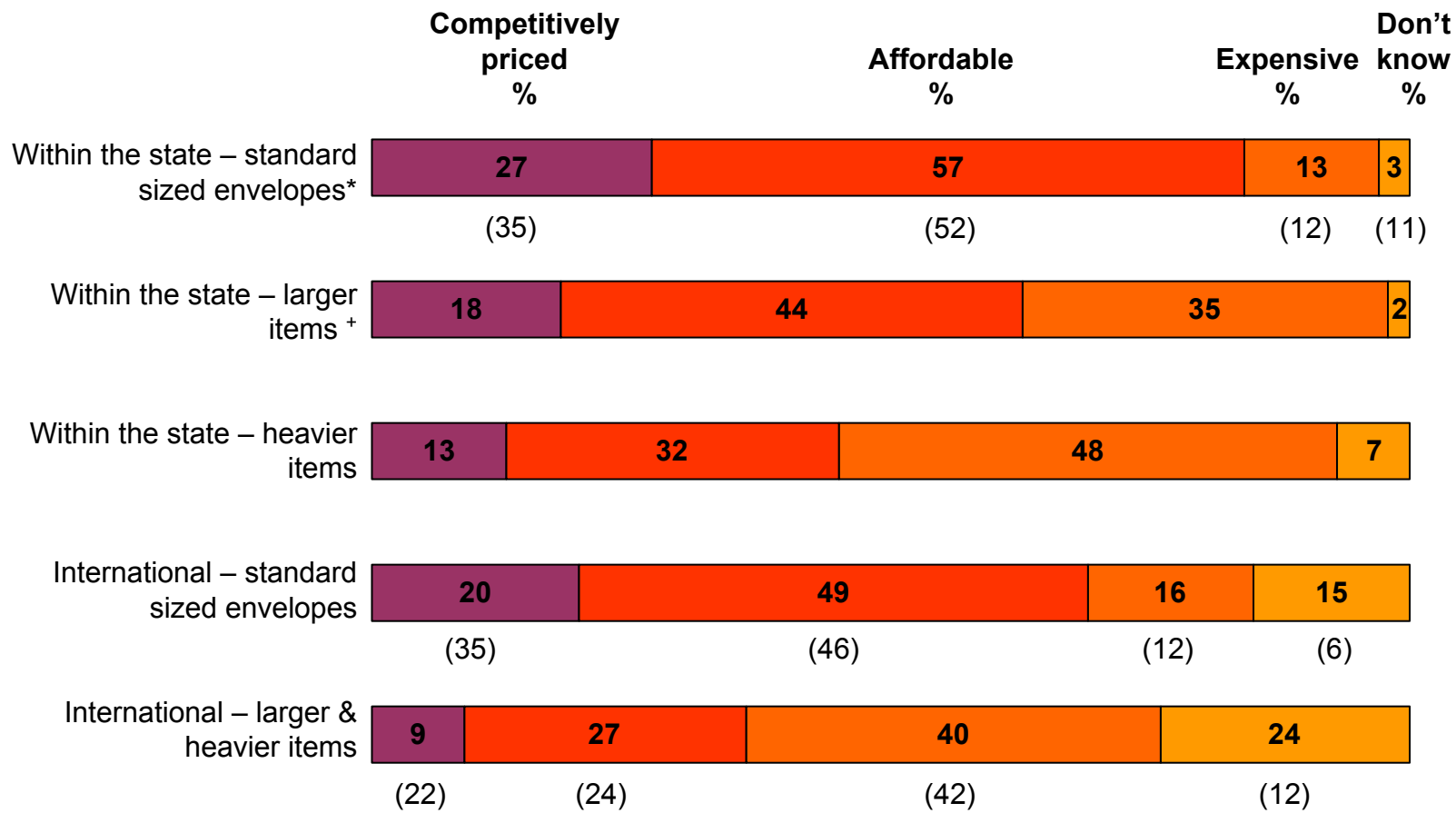
# Satisfaction With Services Provided By An Post X Company Type – Mean Score Summary

Base: All Those Sending 100+ Items A Week: 279

	Weekly volume sent		Sector							
	100-249 (117)	250+ (162)	Finance (25)*	Retail/ Dist. (67)	Manu. (52)	Business Services (92)	Personal Services (22)*	Govt. Services (3)*	IT/Tele- comms (8)*	Other (10)*
Latest collection time in relation to next day delivery of letters	3.60	3.60	4.38	3.62	3.50	3.53	3.53	4.00	3.24	3.86
Time taken to deliver letters	3.71	3.49	4.13	3.71	3.69	3.53	3.42	3.12	3.37	3.55
Value for money	3.67	3.41	4.26	3.56	3.87	3.52	3.47	2.27	2.84	2.88

# Rating Of Value For Money

Base: All Those Sending 100+ Items A Week: 279

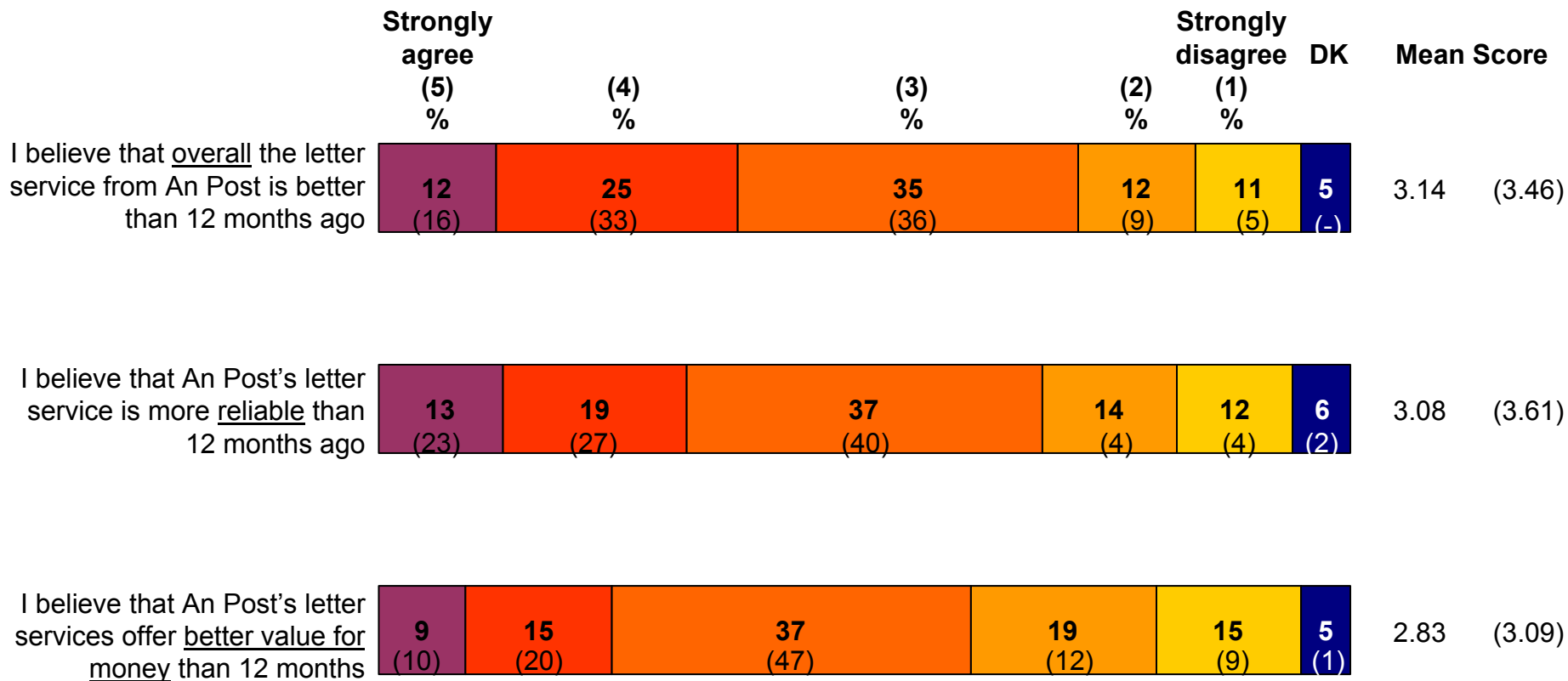


\* Pop letters – items up to C5 size weighing less than 50g

+ 2002 – within the state – larger & heavier items (grouped together)

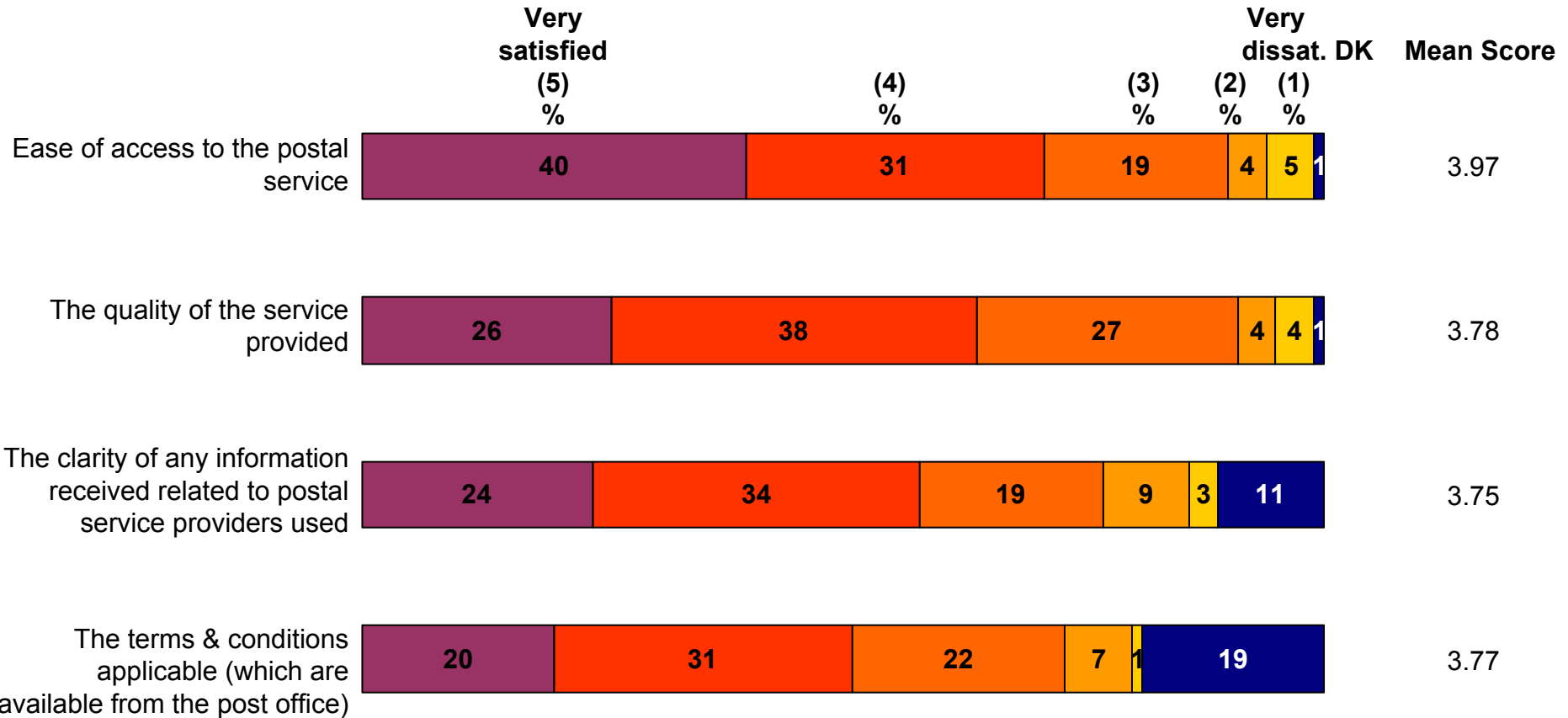
# Perceptions Of Changes In An Post's Service In The Past 12 Months

Base: All Those Sending 100+ Items A Week: 279



# Satisfaction With Additional Aspects Of The Postal Service\*

Base: All Respondents: 506



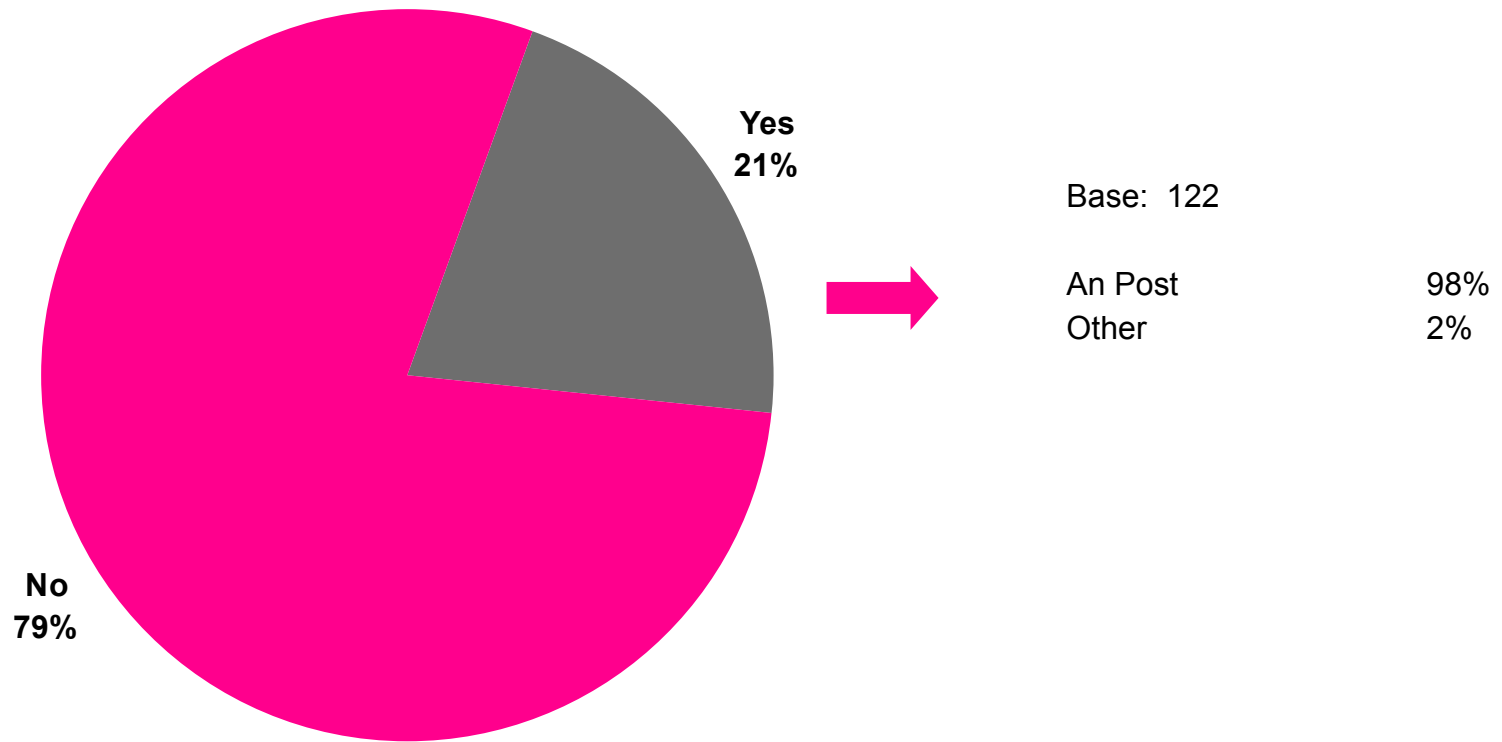
# Overall Rating Of The Postal Service In Ireland

Base: All Respondents: 506



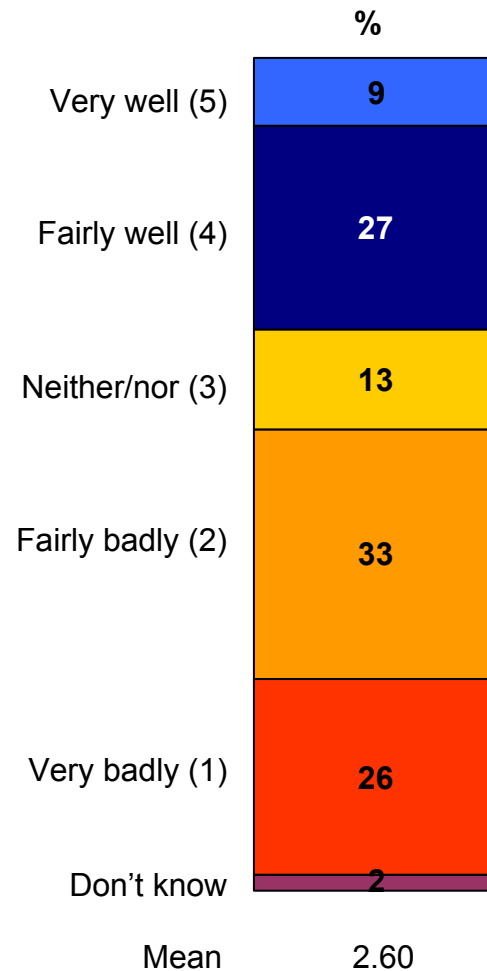
# Whether A Complaint Has Been Personally Made In The Past 12 Months

Base: All Respondents: 506



# Satisfaction With How The Complaint Was Dealt With

Base: All Those Who Have Made A Complaint In The Past 12 Months: 106





# Management Summary

# Mail Sending Patterns (1)

- Just over half of businesses (52%) send up to fifty letters a week, whilst a minority (3%) continue to dispatch over two thousand letters on a weekly basis. Compared with last year there are twice as many companies (15% vs. 8% in 2002) sending high volumes of letters (250-2000 per week). Across all businesses the average is around 420 letters a week.
- Clearly the larger the company (in terms of number of employees), the higher the average volume of mail. Industry sector appears also to be a key driver, with companies in finance, personal services and government services sending higher than average volumes.
- One quarter of businesses send letters only nationally, i.e. no internationally addressed items. Overall, 85% of letters dispatched from businesses are to an address in Ireland and 15% are for overseas. The highest volume companies typically send between 1-5% of letters internationally.
- 6 in 7 businesses (86%) use An Post for all their posting requirements. More companies appear to be using other postal service providers compared with last year (14% vs. 9% in 2002). These tend to be companies sending out higher volumes of mail, notably in finance (27%) and business services (17%).

# Mail Sending Patterns (2)

- Hays DX, DHL, Fedex and SDS remain the most widely used alternative postal providers. Although off a very small base, there are indications that some providers are more likely to be used for particular services: Hays DX – document exchange; DHL – international post in general; Fedex – international post to USA/ rest of the world and SDS – within the state. Main reasons spontaneously mentioned for using other providers relate to speed/ efficiency and reliability/ guaranteed delivery. Previous experience and cost were also mentioned as factors.
- Awareness of alternative postal service providers is low amongst the business community, with up to 84% unable to name another provider. Amongst non users, DHL was most likely to be recalled (5%), followed by SDS, Fedex and UPS (all at 3%).
- Of the highest volume mailing companies (2001+ letters a week), around 4 in 10 (42%) have used An Post's direct mail service. A similar proportion (40%) of those companies sending 100-2000 letters a week intend to use the service in the next 12 months.

# Mail Sending Patterns (3)

- Although over half of businesses (54%) are sending more letters nationally this year than last year, this proportion has fallen versus 2002 (63%). The small minority (5%) experienced a decrease in nationally mailed items. Less than one third (30%) have had an increase in their international mail volumes (28% in 2002), while 10% have seen a decrease. Email/ electronic transfer is the main reason cited for these decreases, whilst a change in business strategy/ reduced demand is also instrumental in driving the decrease for international items.
- The wide range in volumes mailed is also reflected in the differences in annual spend on letter post services with An Post, with 80% of businesses spending less than the average figure, which is €10,783 per annum. For the 14% of businesses using another provider (not An Post), an average spend with other providers of €7,635 was recorded.

# Attitudes and Satisfaction Levels With An Post (1)

- While the majority of businesses are satisfied with An Post, satisfaction has decreased across all service issues rated in both this and last year's surveys. Latest collection time in relation to next day delivery is unsatisfactory for 1 in 6 businesses (17% vs. 7% in 2002).
- Value for money is unsatisfactory for around 1 in 10 (12%), however attitudes differ amongst the various types of mail. The larger or heavier the item, the greater the likelihood of the postal rate being considered expensive, whether within the state or international , but particularly so for heavier items within the state (48% consider expensive).
- When businesses were asked if An Post's service had, in their experience improved or not, the balance of opinion was that it had improved. That said, there was a marked increase in the proportion of businesses noting that the reliability of An Post's service had not improved in the past 12 months.

# Attitudes and Satisfaction Levels With An Post (2)

- Some additional aspects were included in this year's survey, adapted from the most recent Eurobarometer study. Covering ease of access, quality of service, clarity of information and terms and conditions, ratings were good in general, with less than 1 in 10 businesses dissatisfied with any one aspect.
- Overall, 87% of respondents consider the postal service in Ireland to be very/ fairly good.
- Up to 1 in 5 respondents have, personally made a complaint in the past 12 months, nearly all to An Post. Around 6 in 10 (59%) consider their complaint to have been handled very/ fairly badly.