



Business Postal Services Survey

Presentation of Findings
By



December, 2005

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 - Postal Services Spend
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Introduction



Methodology

- Telephone interviews were conducted with a sample of 500 businesses in the Republic of Ireland
- To maintain comparability with previous research waves the methodology and sample were designed to be in line with the previous approach adopted.
- Quotas were set for company size and region.
- The leads used had the same industry sector distribution as was achieved in 2004. As such, the profile of respondents by industry sector is similar to 2004.
- 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 in November 2005.





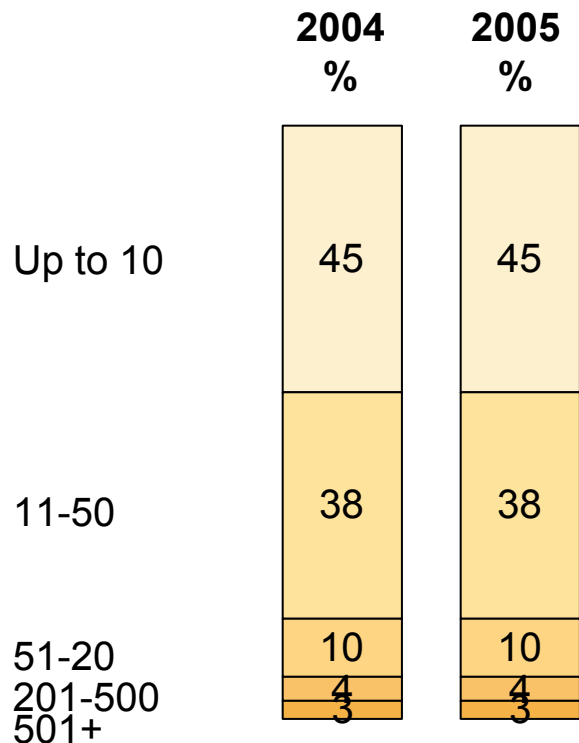
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Sample Profile

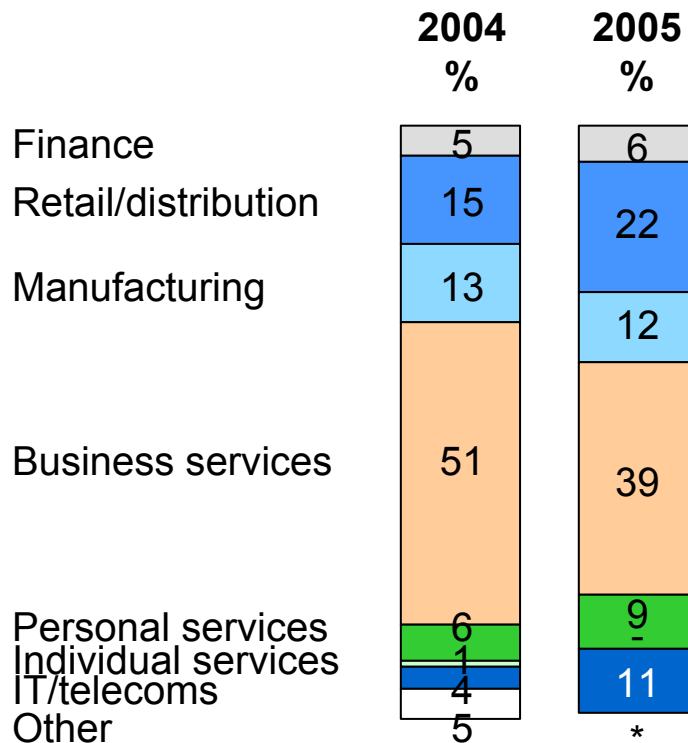


Company Profile

No. of Employees in ROI



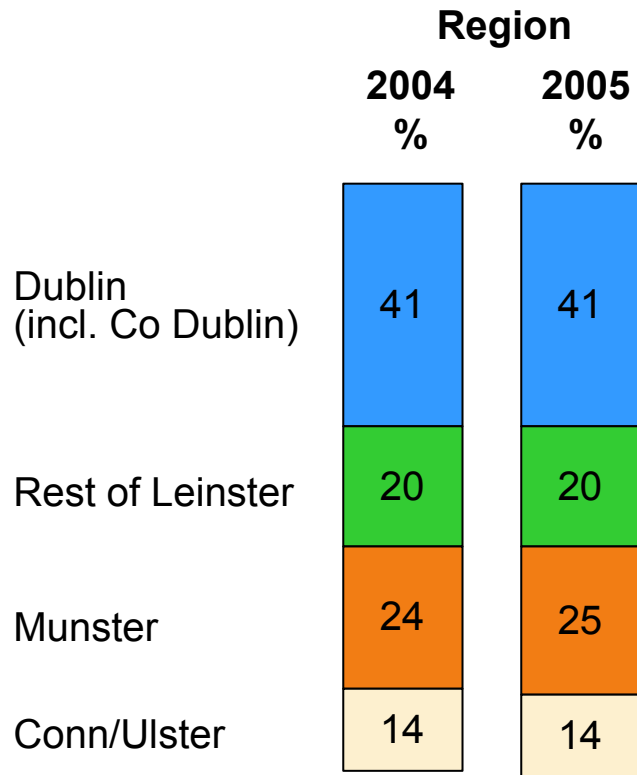
Industry Sector



Base: All respondents (n=500)



Company Profile



Base: All respondents (n=500)





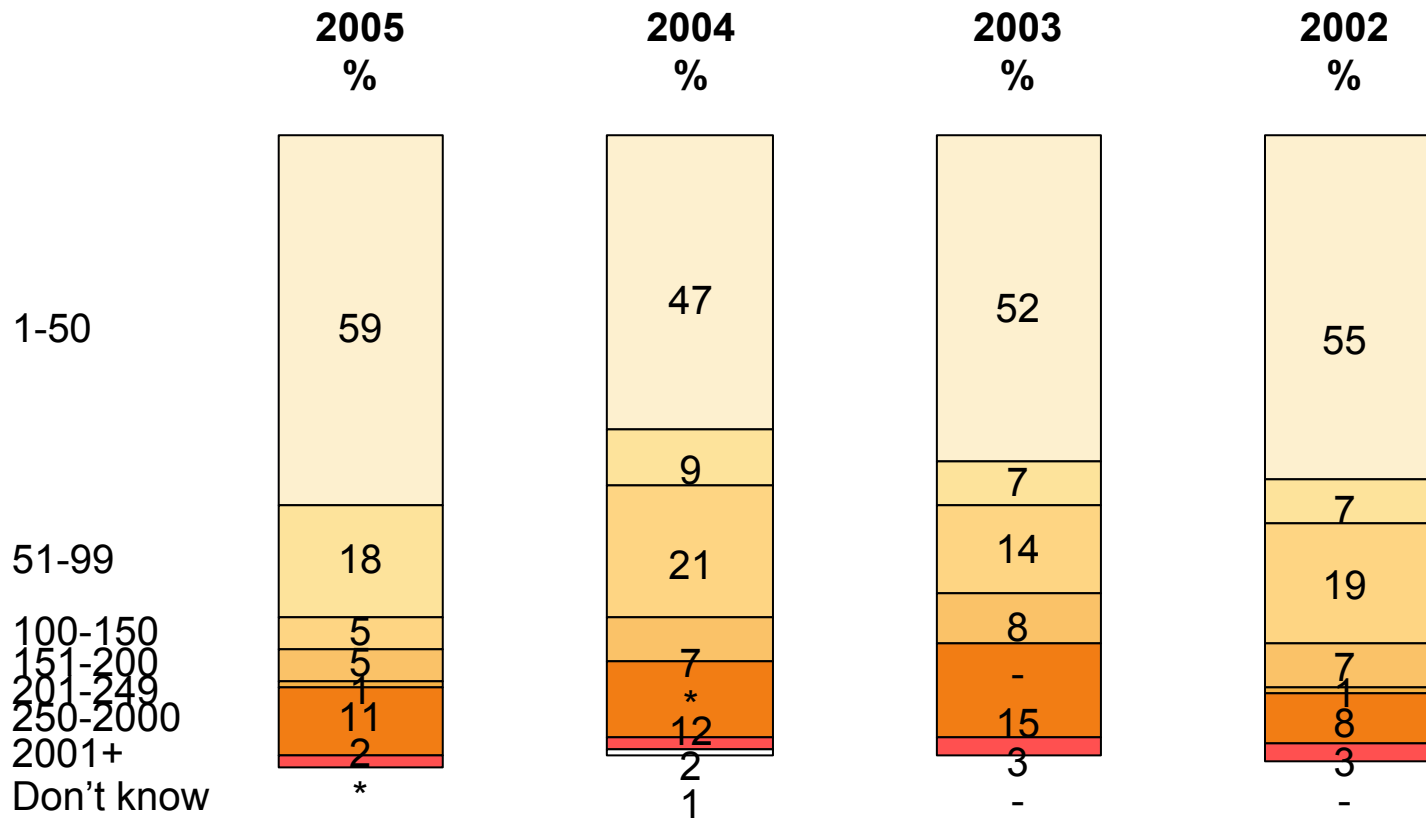
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Usage of Postal Services



Weekly Volume of Letters Sent

Q. How many letters does your business/premises (in the case of companies with more than one premises) send each week?
 By letter post we mean all items in envelopes up to A4 size and weighing up to 100g, e.g. bills.

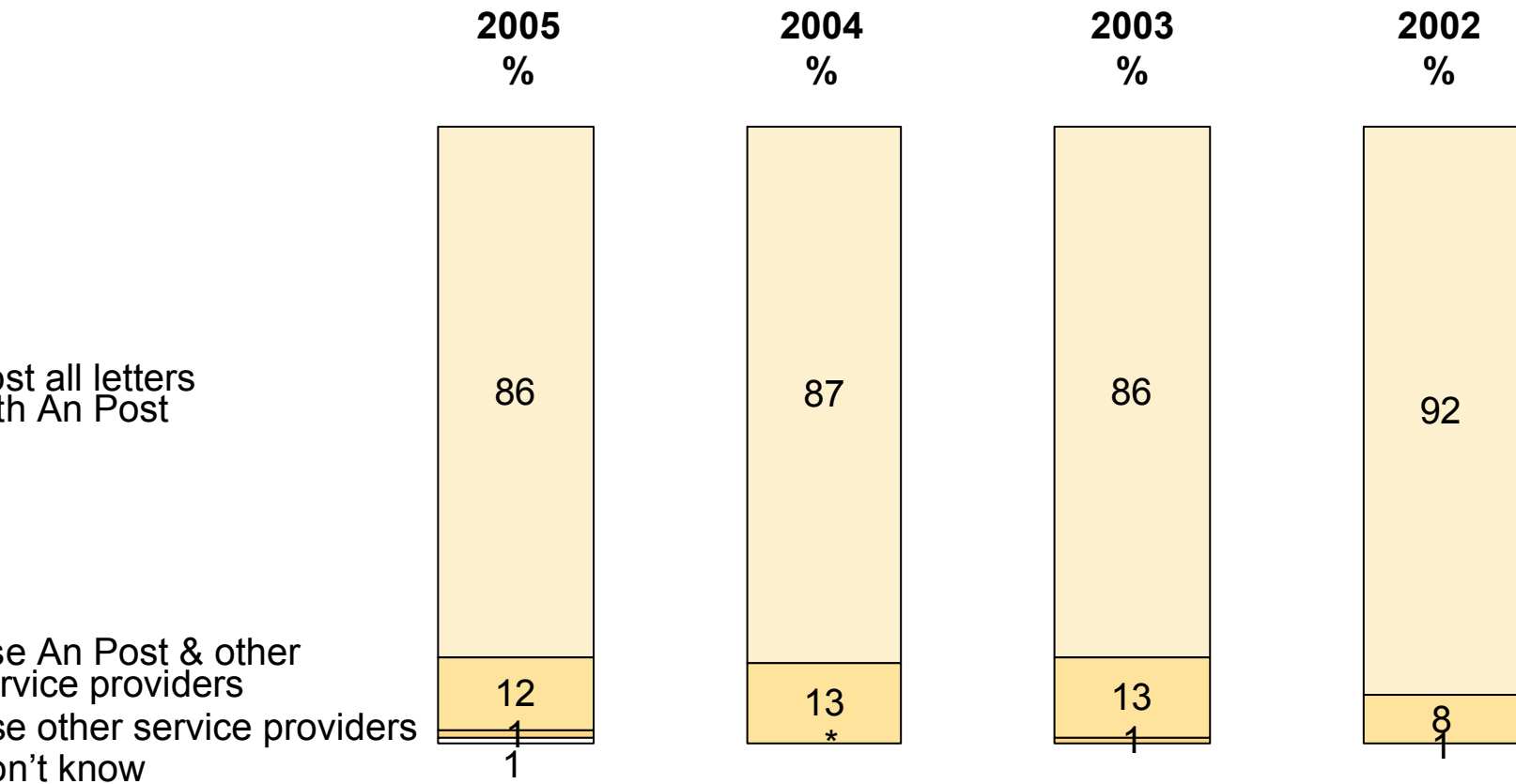


Base: All respondents (n=500)



Postal Service Providers Used

Q. Do you post all these letters with An Post, or do you use services offered by another company or do you use both An Post and another company?

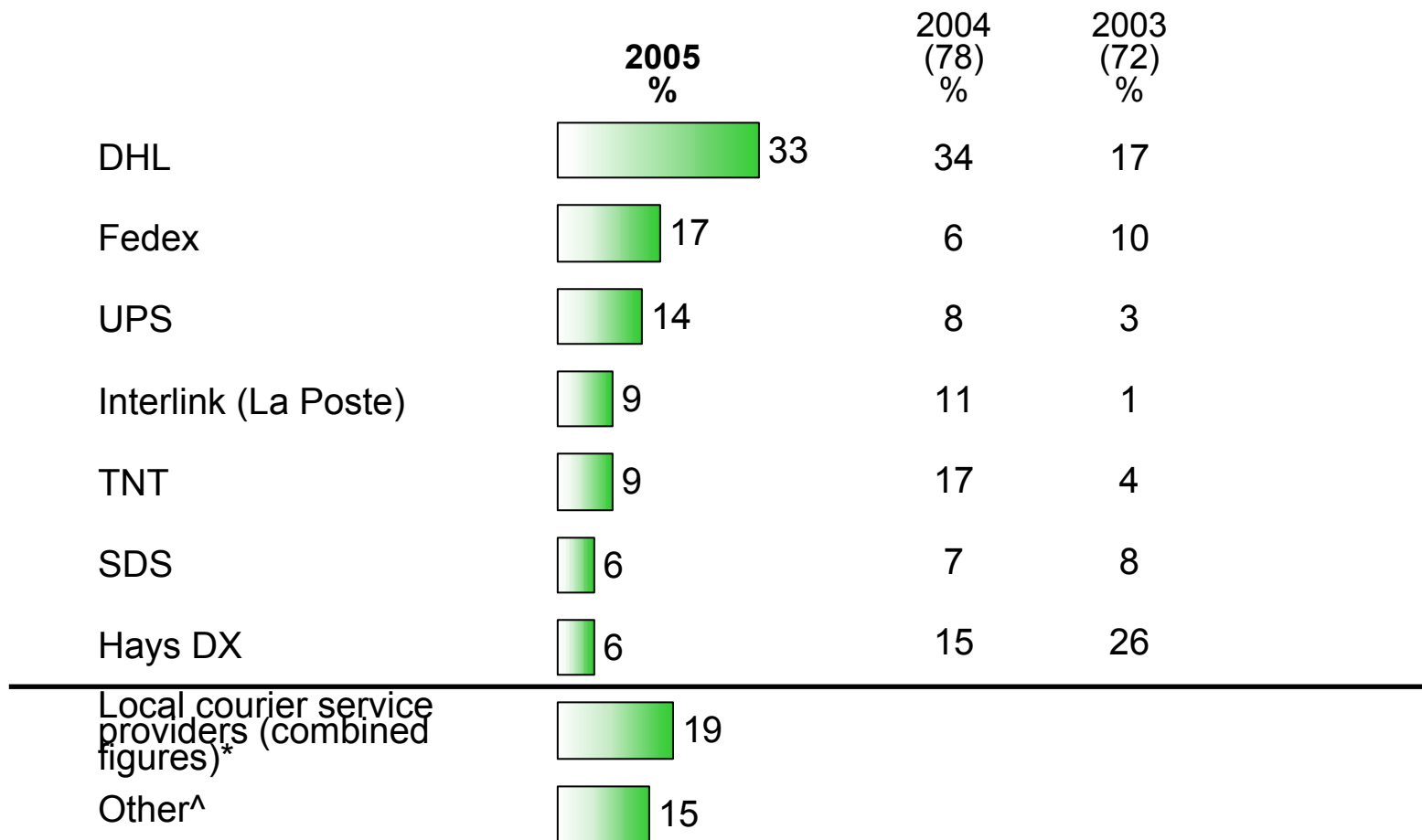


Base: All respondents (n=500)



Other Postal Services Providers Used

Q. What other company (companies) do you use?



Base: All those who use other providers (n= 64)

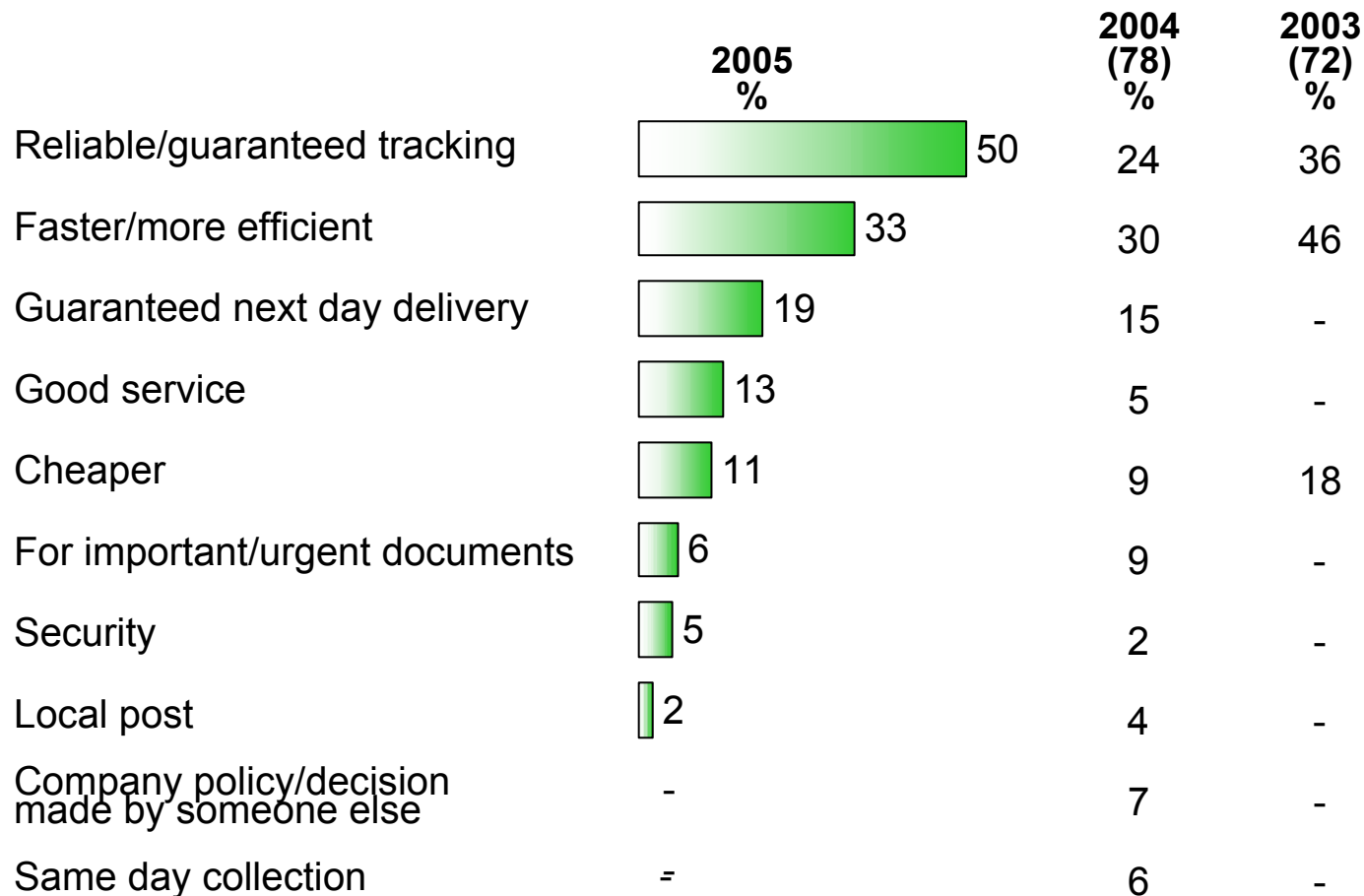
* No single provider greater than 3%

^ No single provider greater than 3%



Reasons for using other Postal Service Providers

Q. And why do you use the services of this company?

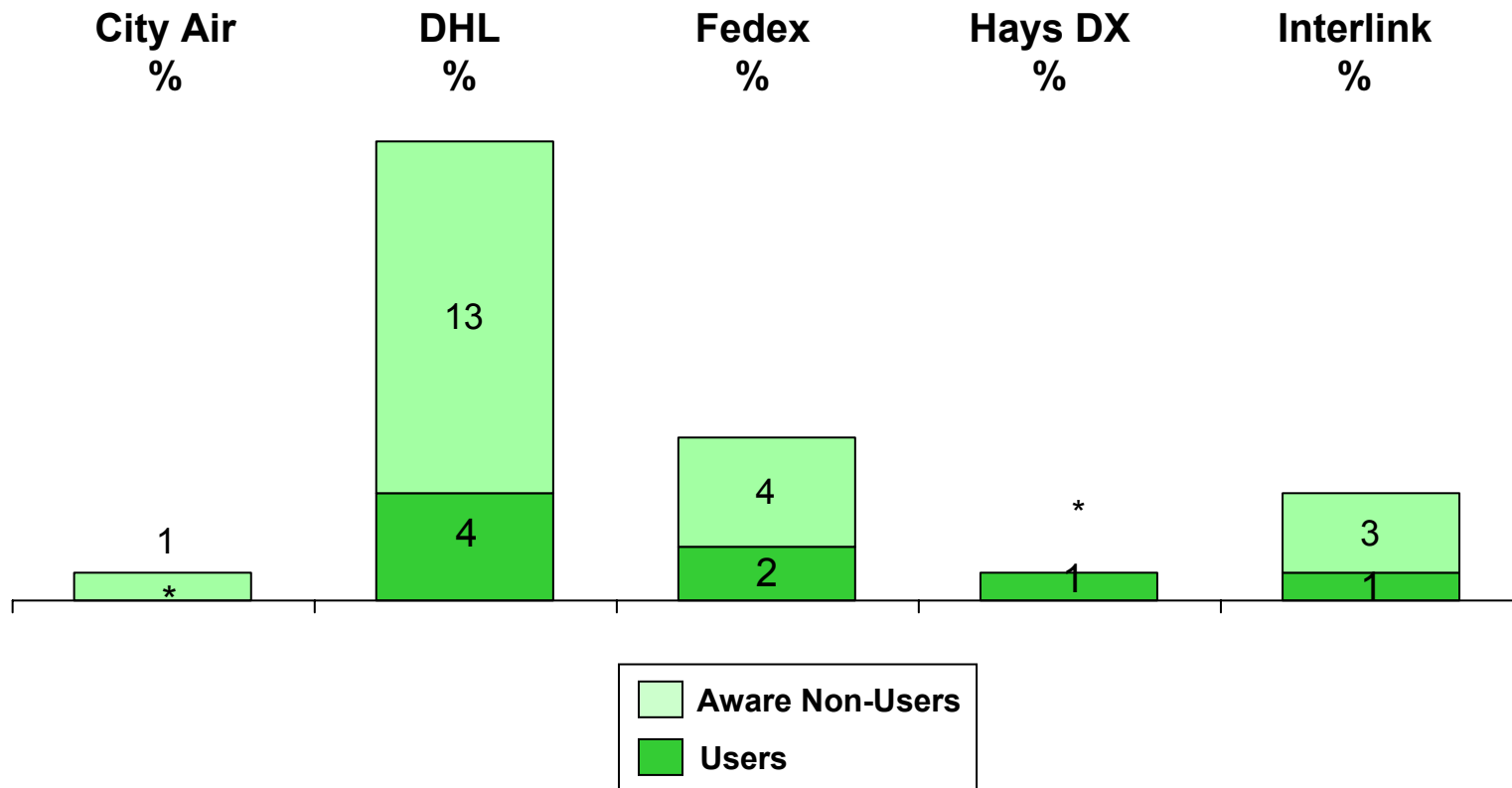


Base: All those who use other providers (n= 64)



Awareness and Usage of Other Providers - I

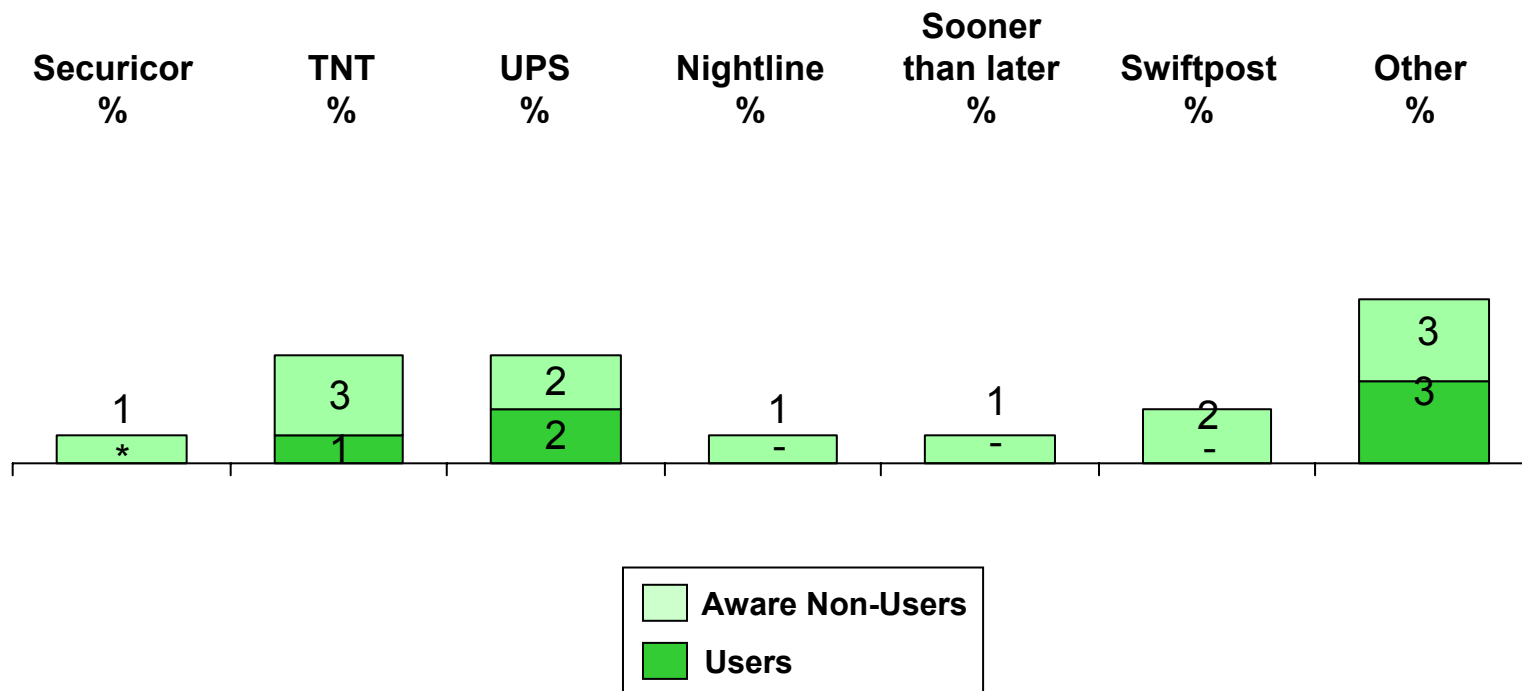
Q. What other companies are you aware of that you could use for sending letters, besides An Post/those you currently use?



Base: All respondents (n=500)



Awareness and Usage of Other Providers- II



Base: All respondents (n=500)



Awareness of Services offered by other Providers

Q. From the list of services I read out, tell me whether (insert company mentioned at Q.3d) as far as you are aware, provide this type of service?

Raw Numbers

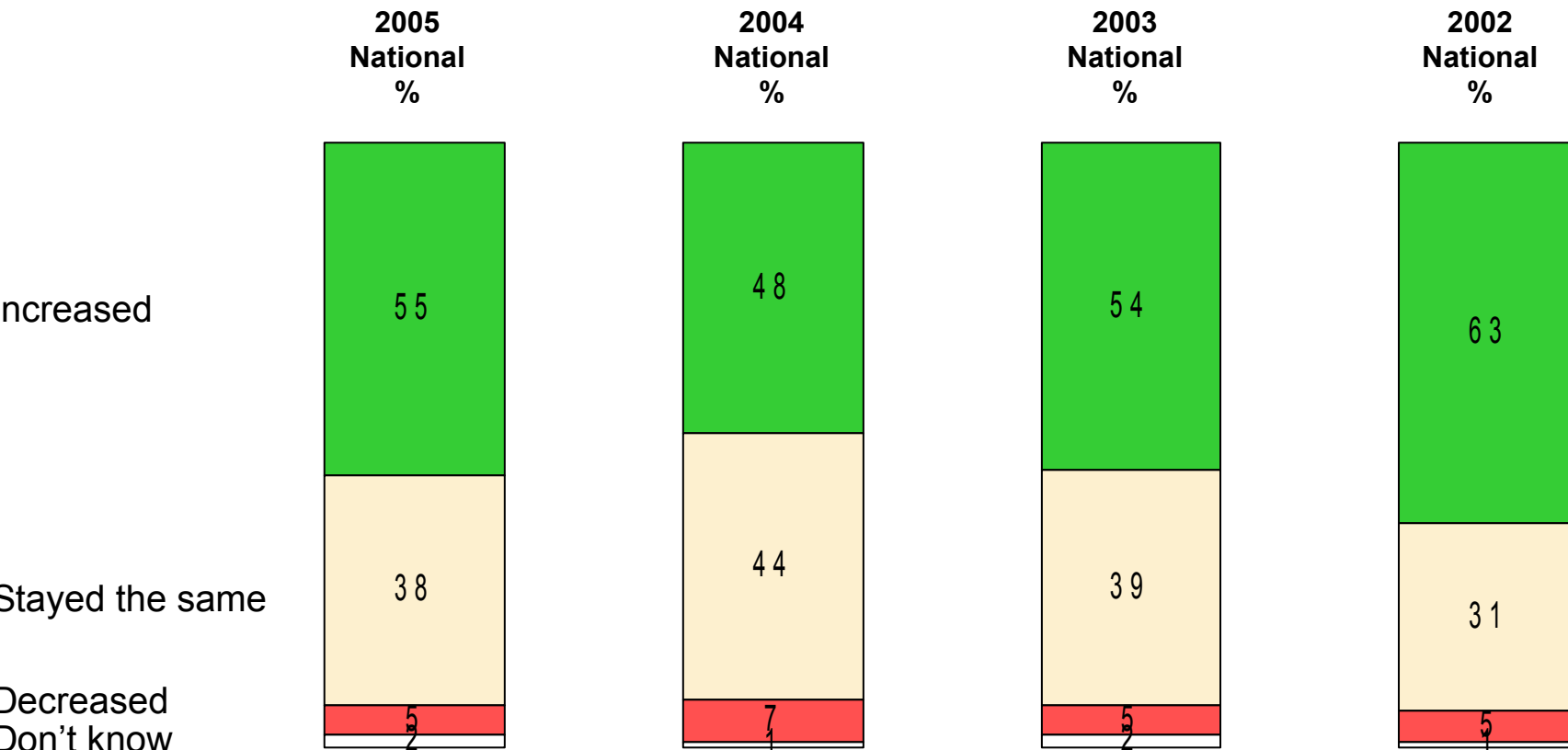
	DHL (84)	SDS (14)	UPS (18)	TNT (20)	Fedex (28)	Interlink (20)
Letter post within the state (incl. N.I.)	48	13	13	15	15	13
Any International letter post	72	11	16	15	22	10
Document Exchange	43	9	11	7	15	9

Note: Bases less than 10 not shown



Trends in the Volume of National Post

Q. For each service I read out, can you tell me if the number of letters you post each week has increased, decreased or remained the same over the past twelve months?

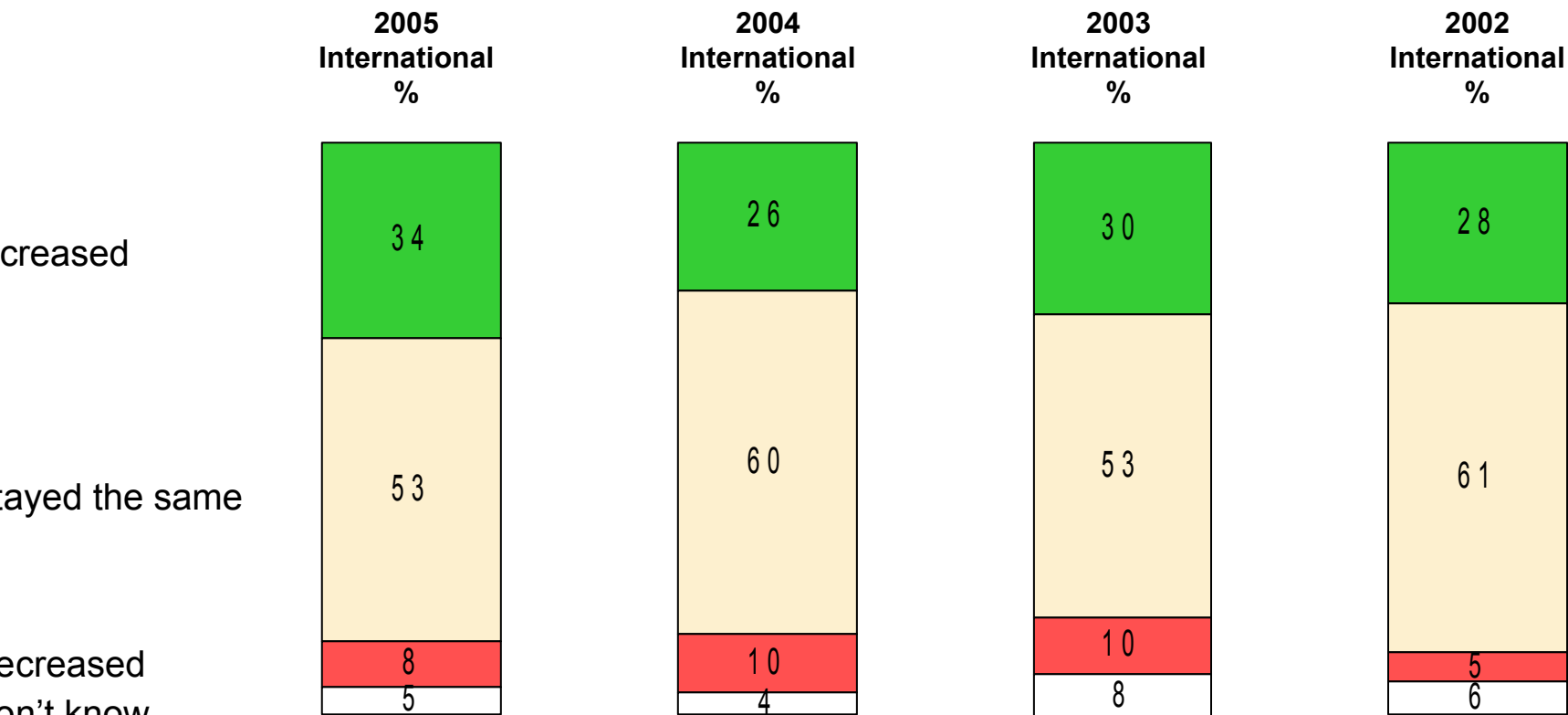


Base: All those sending 100+ letters a week (114)



Trends in the Volume of International Post

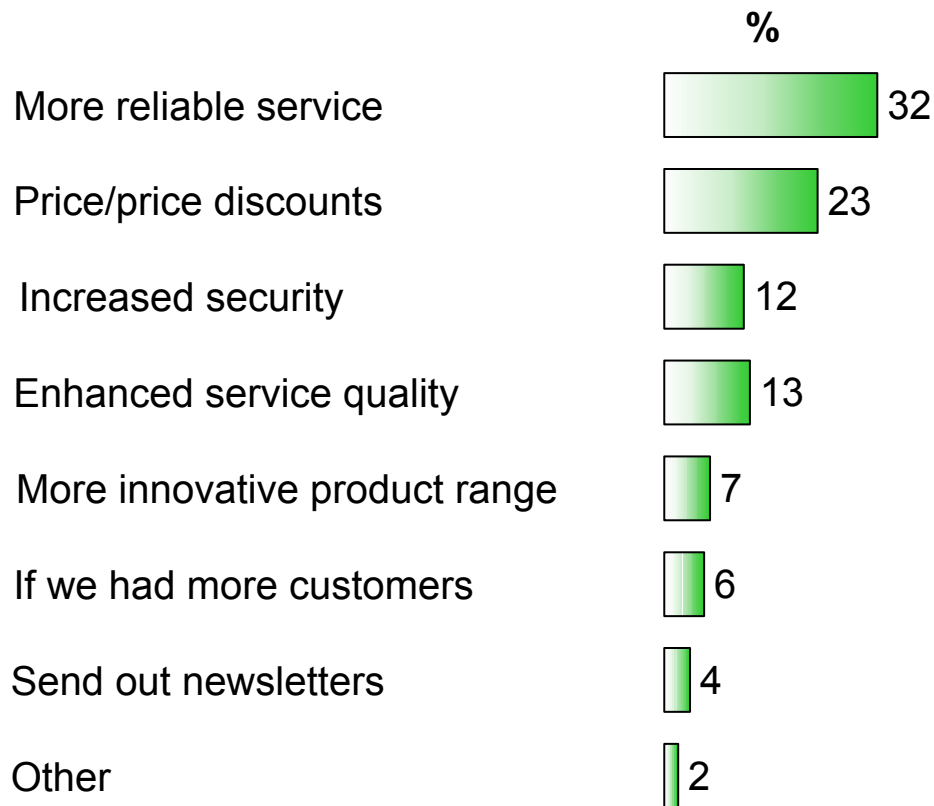
Q. For each service I read out, can you tell me if the number of letters you post each week has increased, decreased or remained the same over the past twelve months?



Base: All those sending 100+ letters a week (n=114)



Factors that would Increase Volume of Mail Posted



Base: All those sending 100+ letters a week (n=114)





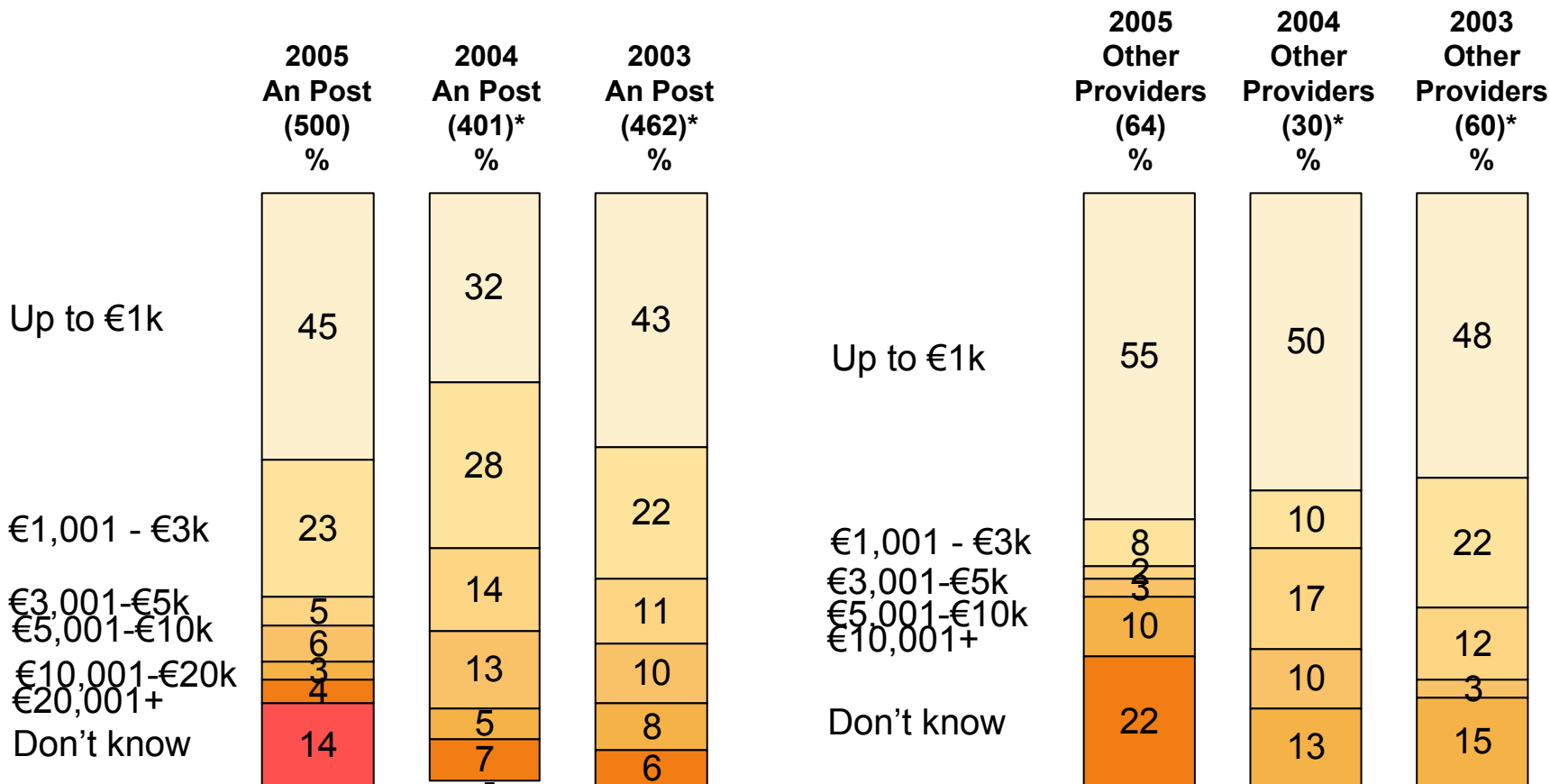
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**Postal Services
Spend**



Annual Spend on Letter Post Services

Q. How much annually does your company spend, in Euro, on letter post services with (a) An Post (b) Other service providers?



Estimated Average Annual Spend with An Post

	2005 €	2004 €	2003 €
Total	5,953	7,814	10,783
<hr/>			
By Weekly Volume			
1-50	1,244	1,452	1,000
51-249	3,848	5,497	7,820
250+	30,321	33,776	44,461
<hr/>			
By Sector			
Finance*	32,235	40,743	27,829
Retail/Distribution	5,780	6,662	5,085
Manufacturing	2,658	5,116	6,659
Business Services	4,489	6,187	13,132
Personal Services*	3,719	5,736	16,667
Individual Services*	-	14,774	-
IT/Telecoms	3,649	6,336	13,324

Base: All who gave an estimated spend with An Post (n=428) Small base size*





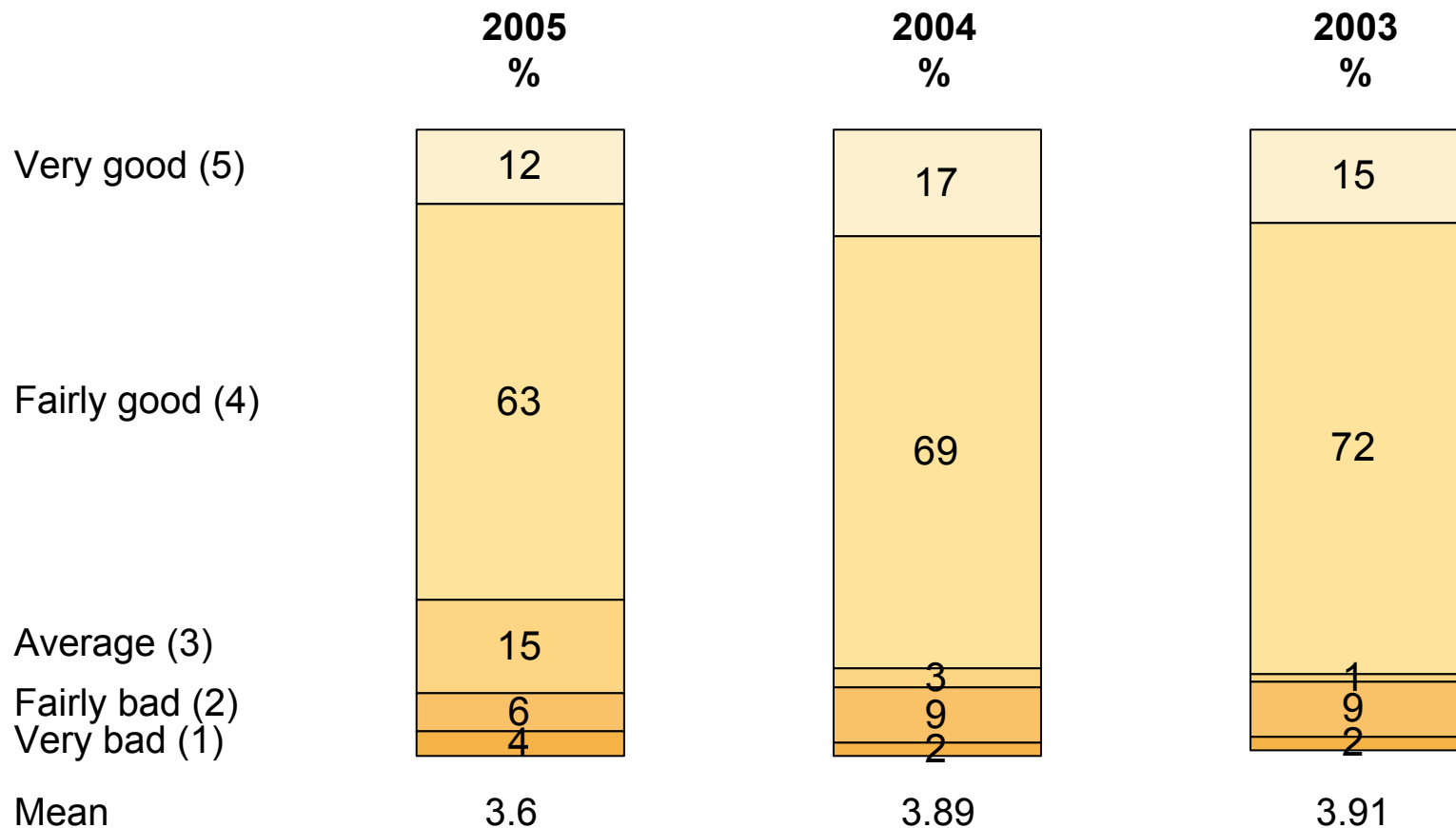
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Satisfaction Levels with Postal Services



Overall Rating of the Postal Service

Q. Thinking about the overall postal service provided here in Ireland, would you say it was very good, fairly good, fairly bad or very bad?

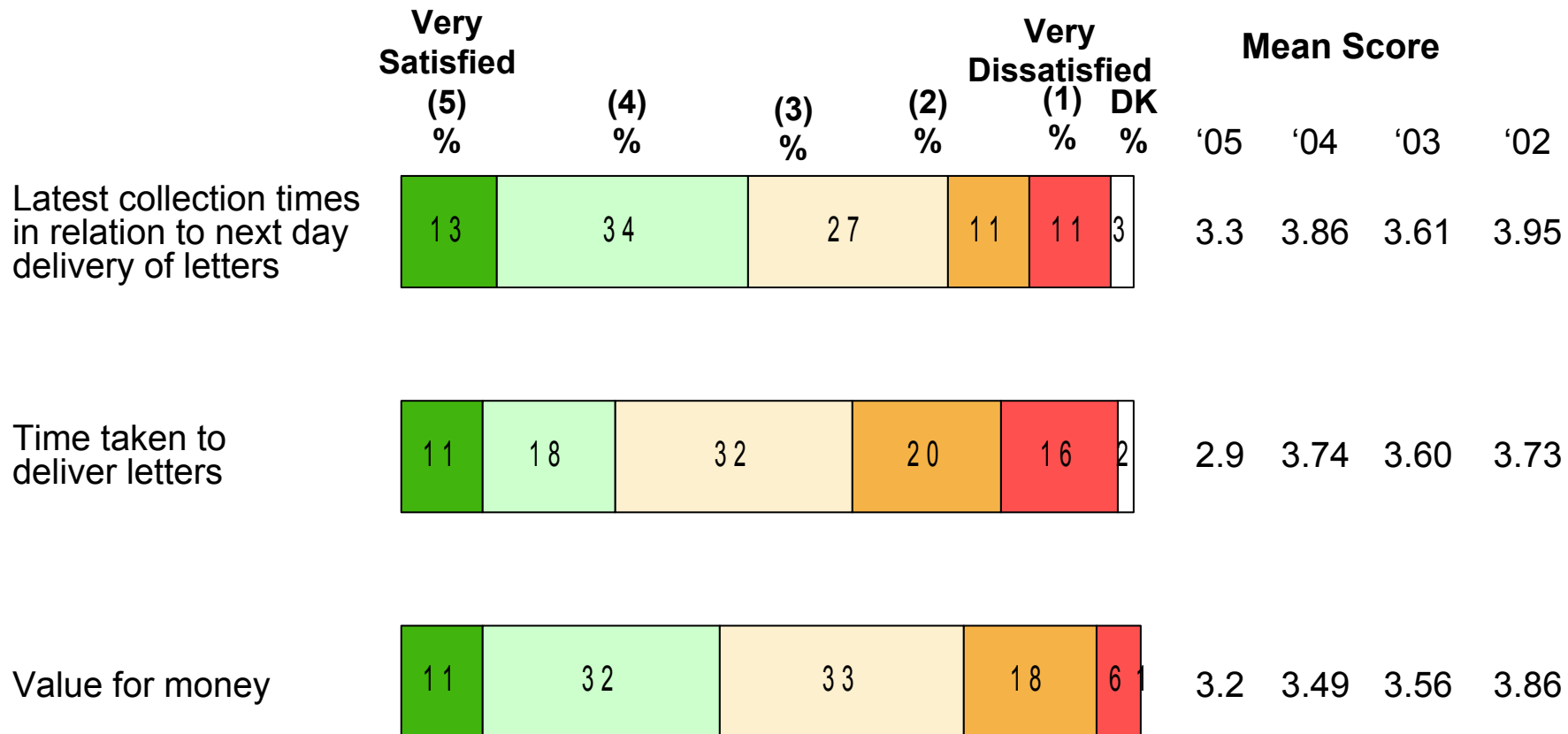


Base: All respondents (n=500)



Satisfaction with Services Provided by An Post

Q. I am going to read out a list of aspects related to An Post letter post services. For each one please tell me if you are satisfied or dissatisfied with each aspect on a scale of 1 to 5, where 1 is very dissatisfied and 5, very satisfied.



Base: All those sending 100+ items a week (n=114)



Value for Money Perceptions

Q. I am now going to read out another list of letter post services provided by **An Post**. Please tell me if you think each service is competitively priced, affordable or expensive.

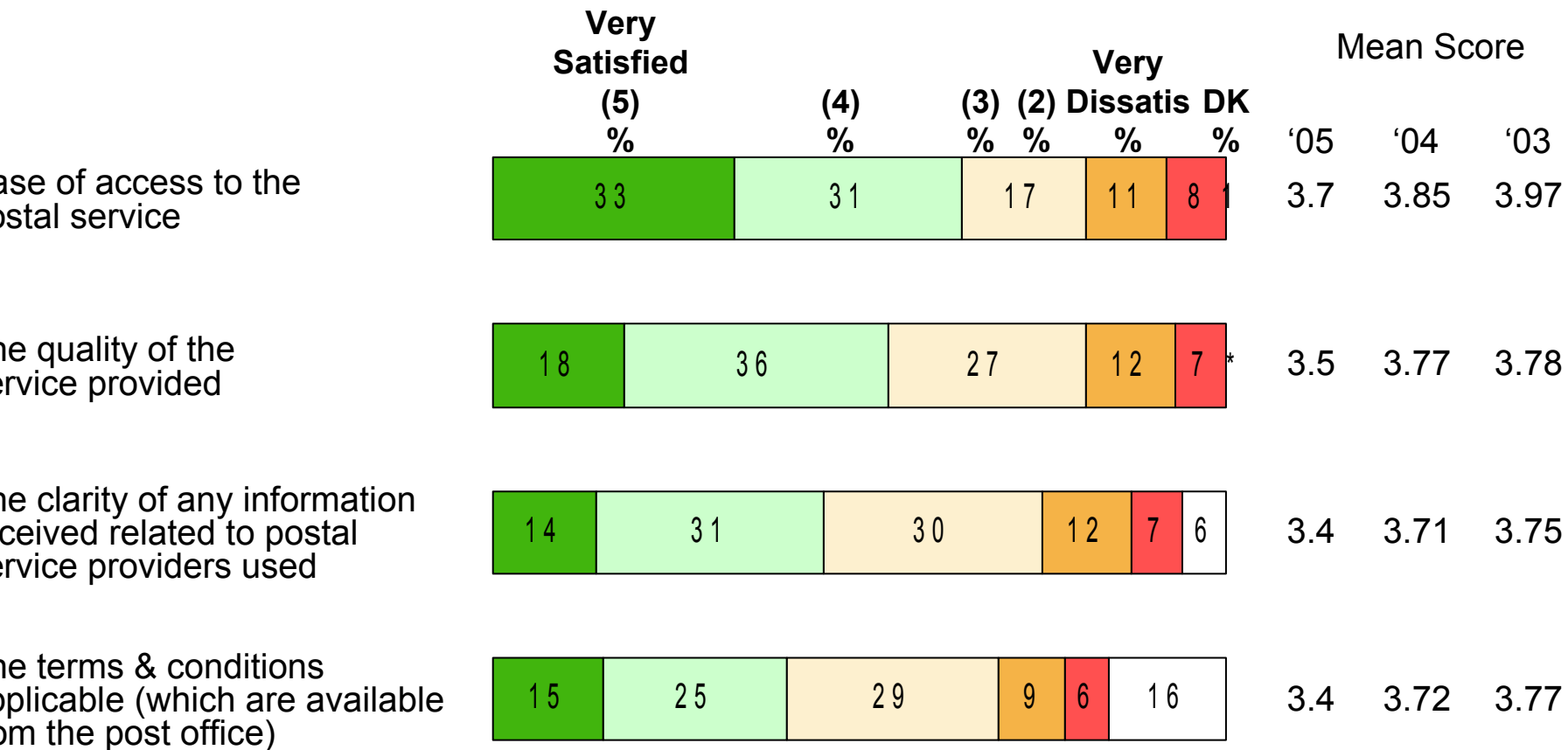
		Competitively %	Affordable %	Expensive %	Don't know %
Within the state – standard sized envelopes	2005	24	49	25	2
	2004	22	54	22	2
Within the state – larger items	2005	23	53	22	3
	2004	18	46	31	5
Within the state – heavier items	2005	25	52	21	2
	2004	17	28	46	8
International – standard sized envelopes	2005	24	61	12	4
	2004	21	49	21	9
International – larger & heavier items	2005	31	49	15	5
	2004	13	30	44	13

Base: All those sending 100+ items a week (n=114)



Satisfaction with other aspects of the Postal Service

Q. I am now going to ask you to rate your satisfaction or dissatisfaction with the postal service on a number of additional aspects, using a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied.

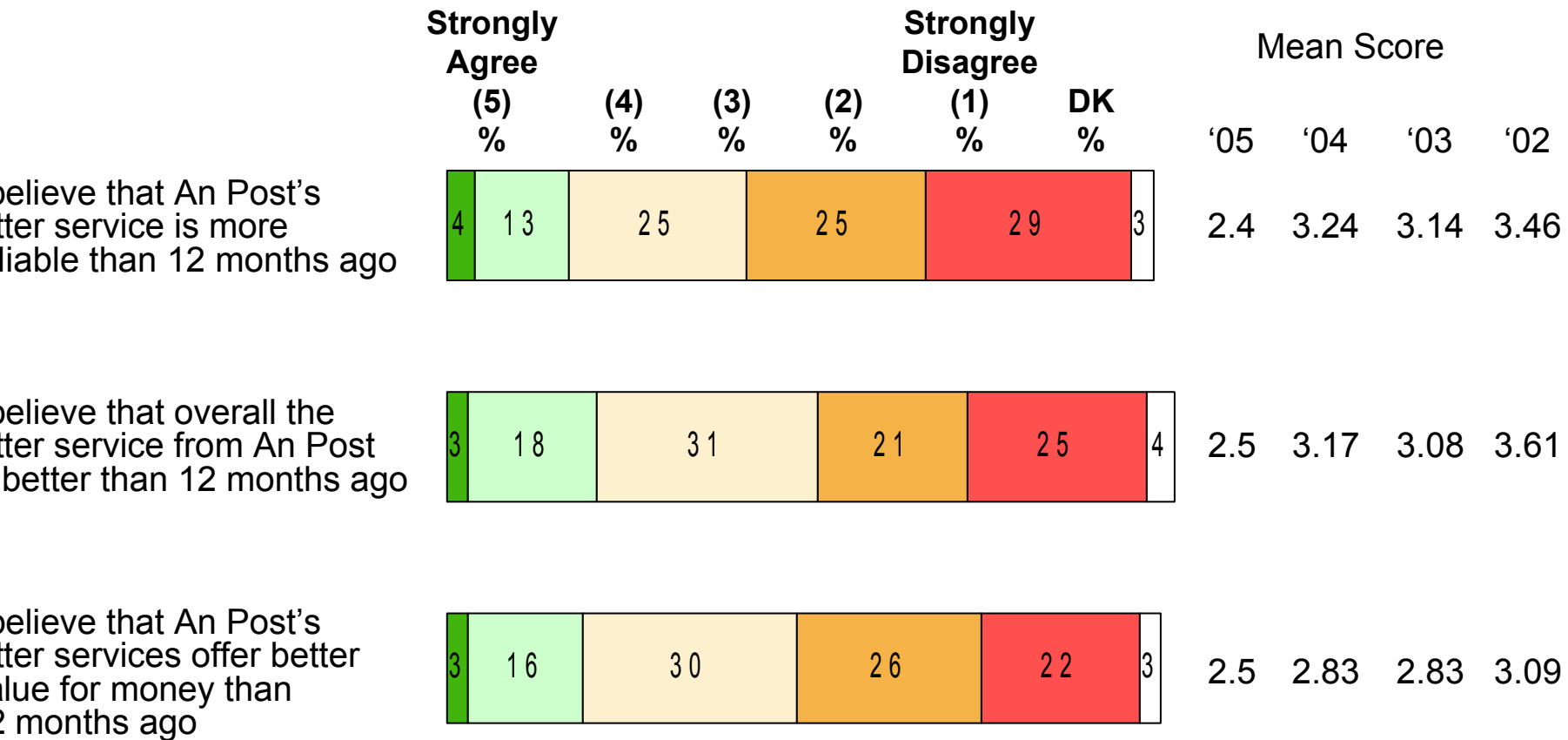


Base: All respondents (n=500)



Changes in An Post's Service in the Past 12 Months

Q. I am going to read out a list of statements relating to the letter post market. I would like you to tell me if you agree or disagree with each statement, using a scale of 1 to 5 where 1 means you strongly disagree and 5 strongly agree.

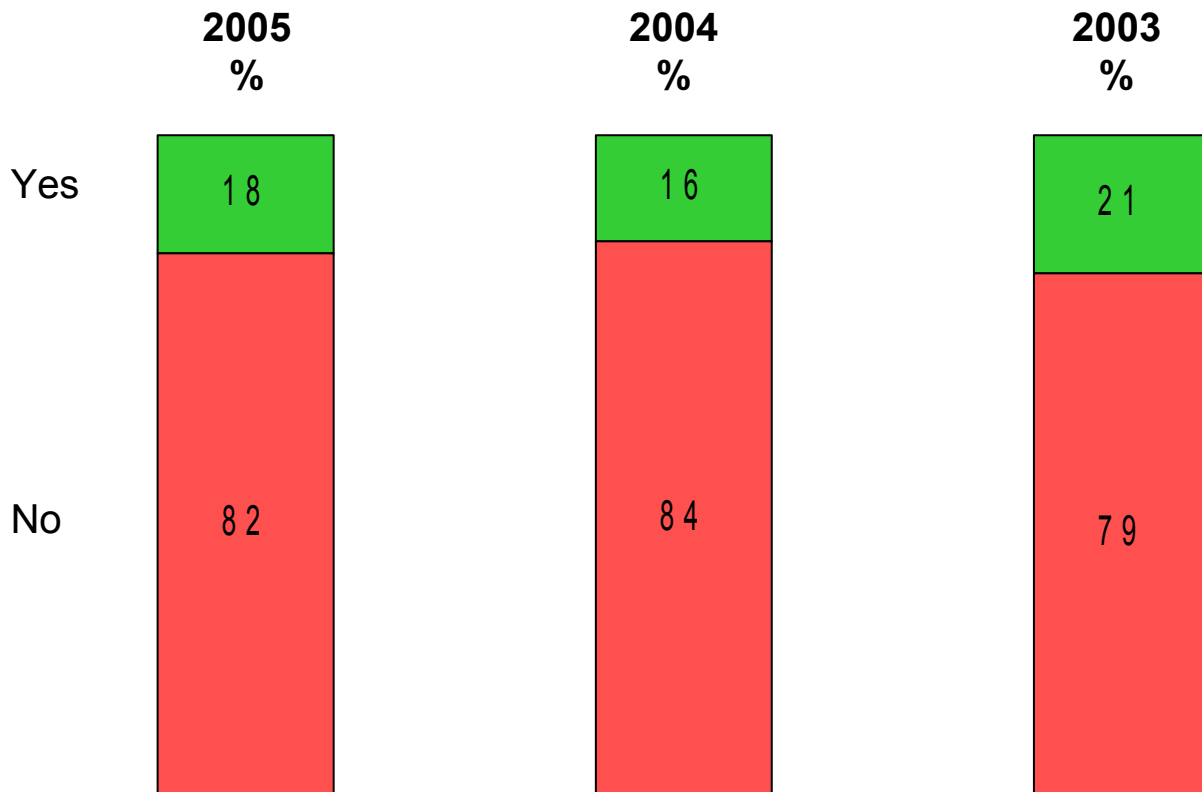


Base: All those sending 100+ items a week (n= 114)



Incidence of Making a Complaint

Q. In the past 12 months, have you personally made a complaint about any aspect of the postal service?



Body or Organisation	2005	2004
Base:	(90)	(89)
An Post	83%	85%
Other	11%	12%
Don't know	6%	3%

Base: All respondents (n=500)



Satisfaction with Complaint Handling

Q. Would you say your complaint was dealt with very well, fairly well, fairly badly, very badly?



Base: All those who made a complaint in the past 12 months (n=90)





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Conclusions

Conclusions - I

- Similar to previous research conducted, companies operating in the financial services sector appear to have the highest level of postal service usage. Overall companies who post low volumes are posting less while those with large volumes are posting more
- Businesses spent an average of €114 per week on postal services with An Post in 2005. This average per week is €24 for companies with 1-50 employees and €583 for companies with greater than 250 employees
- The bulk of Irish businesses continue to rely solely on An Post with only about 12% using An Post as well as other service providers. Larger organisations who spend/post more are more likely to shop around and cite factors such as *added value* and *quality of service* as being more important than price in this regard.
- Awareness of other providers is relatively low. Respondents mentioned DHL, Fedex and UPS most frequently. This evidence suggests that alternative providers should work to generate greater awareness of their services among the business community in Ireland.



Conclusions - II

- Usage of the other providers is most evident among larger companies (with 50+ employees), those in the IT/Telecoms sector and those with above average postal spend and high weekly volume levels. The main reason for using other providers is the perceived reliability and guaranteed tracking. A faster, more efficient service is also an important factor.
- In relation to complaints 18% of those interviewed made a complaint.
- On an overall basis, the majority feel that the postal service in Ireland is either *very good* or *fairly good*.





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