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A note on our postal tracker research

Ofcom Residential Postal Tracker

The residential postal tracker survey is run throughout the course of the year. Since January 2016, data have been collected using a combined methodological approach: face-to-face interviews conducted using random probability sampling, and online interviews using quota sampling.

In 2016, the total sample was 6,419 adults aged 16+ in the UK. A total of 770 respondents took part in Wales. Due to changes to the methodology and the questionnaire, the data collected in Scotland, Wales and Northern Ireland are not directly comparable with previous years' data.

Ofcom Business Postal Tracker

The business postal tracker survey is run throughout the course of the year, via telephone interviews, among a sample of 2,001 people who are responsible for post in UK SMEs (businesses with 0-249 employees). A total of 264 respondents took part in Wales. Due to changes to the methodology and questionnaire, the data collected in Scotland, Wales and Northern Ireland are not directly comparable with previous years' data.

6.1 Sending and receiving post: residential customers

Adults in Wales sent an average of nearly five invitations/greetings cards/postcards in the previous month

Adults in Wales were asked how many items of seven different types of post they had sent in the previous month. On average, they had sent 4.9 invitations/greetings

cards/postcards, 1.5 formal letters to organisations or individuals, 1.4 smaller parcels (that will fit through a letterbox) and 1.4 payments for bills/invoices/statements.

For each of the other three types of post, they claimed to have sent one item or less, on average.

Figure 6.1: Approximate number of postal items sent in the past month



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 4053 England, 857 Scotland, 770 Wales, 739 Northern Ireland)

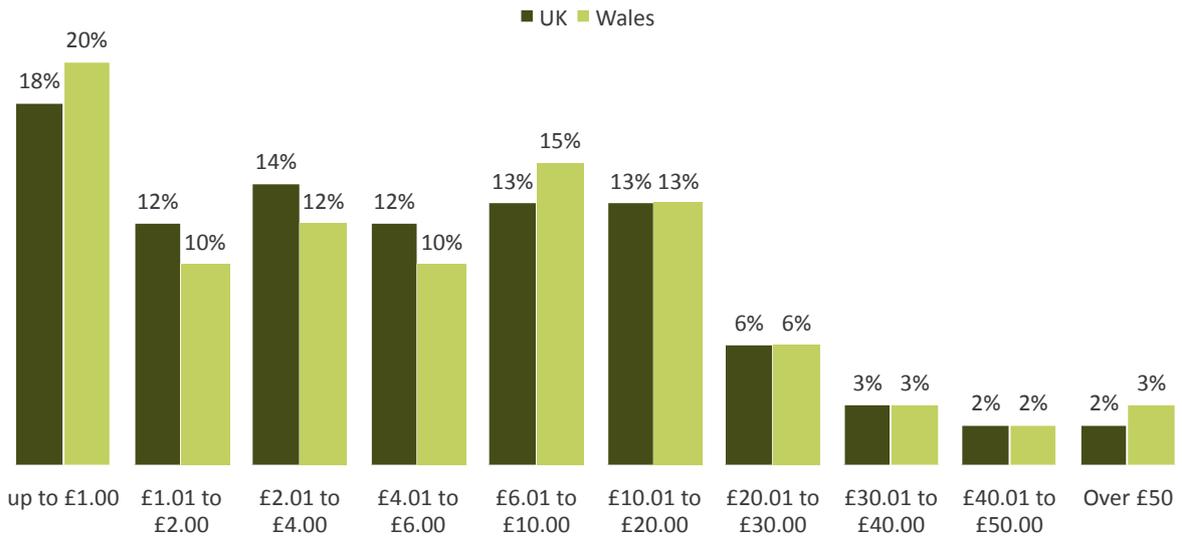
QD1: Approximately how many of the following have you sent in the last month (including international post and Freepost)

Four in five adults in Wales had spent less than £20 on postage in the previous month

Around four in five adults in Wales (81%) said that they had spent up to £20 on postage in the past

month, which is the same level as the UK as a whole (81%). One in five (20%) had spent less than £1.

Figure 6.2: Approximate amount spent on postage in the past month



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 770 Wales)

QD4: And in total, how much would you say you've spent on postage in the last month, including all letters, cards and parcels?

Note: Chart does not include the 6% of respondents who answered that they didn't know or would prefer not to say

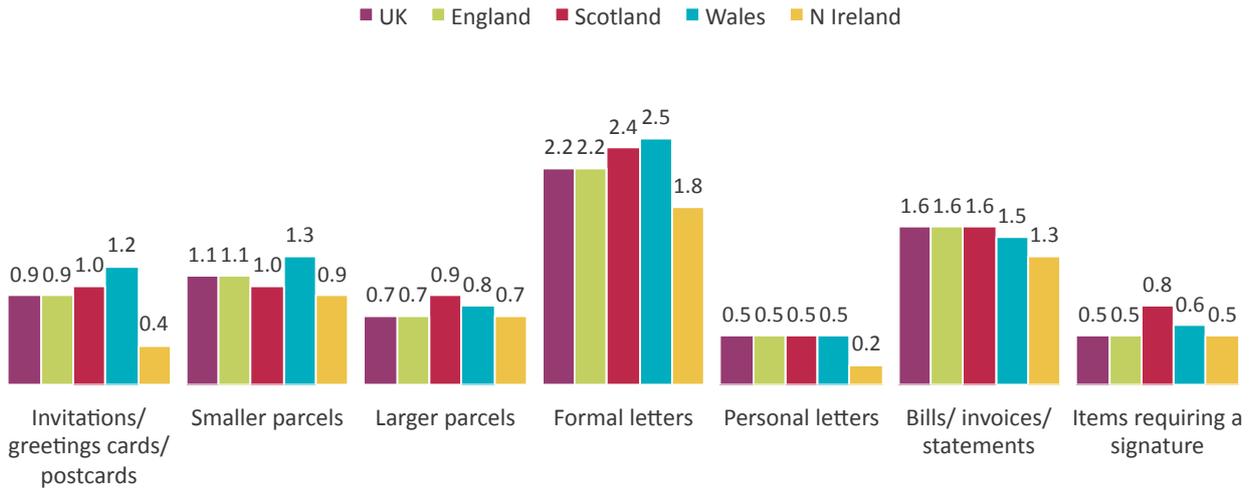
Adults in Wales received an average of 2.5 formal letters in the previous week

Adults in Wales were asked how many items of seven different types of post they had received in the previous week. On average, they

had received 2.5 formal letters from organisations or individuals, 1.5 bills/ invoices/ statements, 1.3 smaller parcels and 1.2 invitations/

greetings cards/ post cards. For each of the other three types of post, they had received on average less than one item.

Figure 6.3: Approximate number of items of post received in the past week



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 4053 England, 857 Scotland, 770 Wales, 739 Northern Ireland)

QE1: Approximately how many of the following have you personally received in the last week?

More than six in ten adults in Wales are using email more instead of post, compared to two years ago

People were asked about what types of communication, if any, they are using more than post, compared to two years ago. Over six in ten (64%) adults in Wales reported that they are using email more, instead of post, which is the same level as the UK overall (65%). Four in ten (40%) said that they are using texts/SMS more, and 36% said the same for mobile phone calls. Around a quarter mentioned social networking (26%) and instant messaging (24%).

Eighteen per cent of adults in Wales responded that they aren't using any form of communication in particular more at the expense of post; this is higher than the UK overall (15%).

People were also asked whether they are sending more, less or the same of eight types of post, compared to two years ago. Over four in ten adults in Wales (44%) claimed that they are sending less payments for bills/ invoices/ statements, which is higher than the UK overall (39%). Just under four in ten people in Wales said that they are sending less personal letters (39%) and less formal letters (36%). Three in ten answered that they are sending less invitations/ greetings cards/ postcards (29%), while around a quarter responded that they are sending less larger parcels (24%) and smaller parcels (23%). Less than one in five said that they are sending less items requiring a signature (18%) and less tracked post (15%).

44%
of people in Wales are sending fewer payments for bills, invoices and statements by post than two years ago

Apart from the payments for bills/ invoices/ statements, all of these measures are in line with the UK overall.

For each of the eight types of post asked about, the percentage of people in Wales claiming to be sending more of this type of item compared to two years ago was significantly lower than the percentage of those claiming to send less, with the exception of tracked post. The percentages of those claiming to send more and less of this type of post are the same (both 15%). For each of the other types of post, the percentage of those that said they are sending more than they were two years ago is 12% or less.

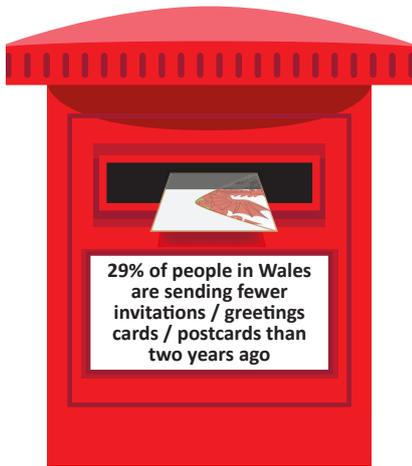
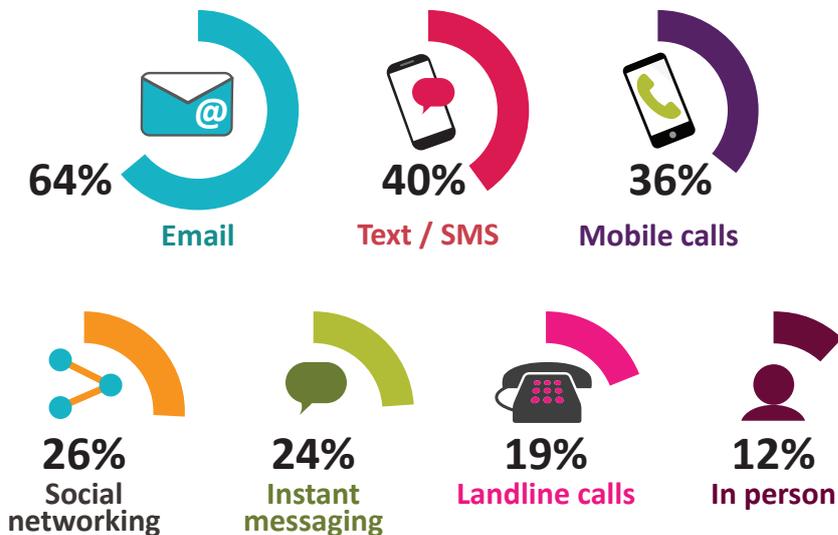


Figure 6.4: Communication types used more, instead of post, compared to two years ago



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 4053 England, 857 Scotland, 770 Wales, 739 Northern Ireland)

QD13: Which, if any, of these types of communication are you now using more instead of post, compared to two years ago?

6.2 Attitudes toward Royal Mail: residential customers

Satisfaction with specific aspects of Royal Mail’s service in Wales is generally high

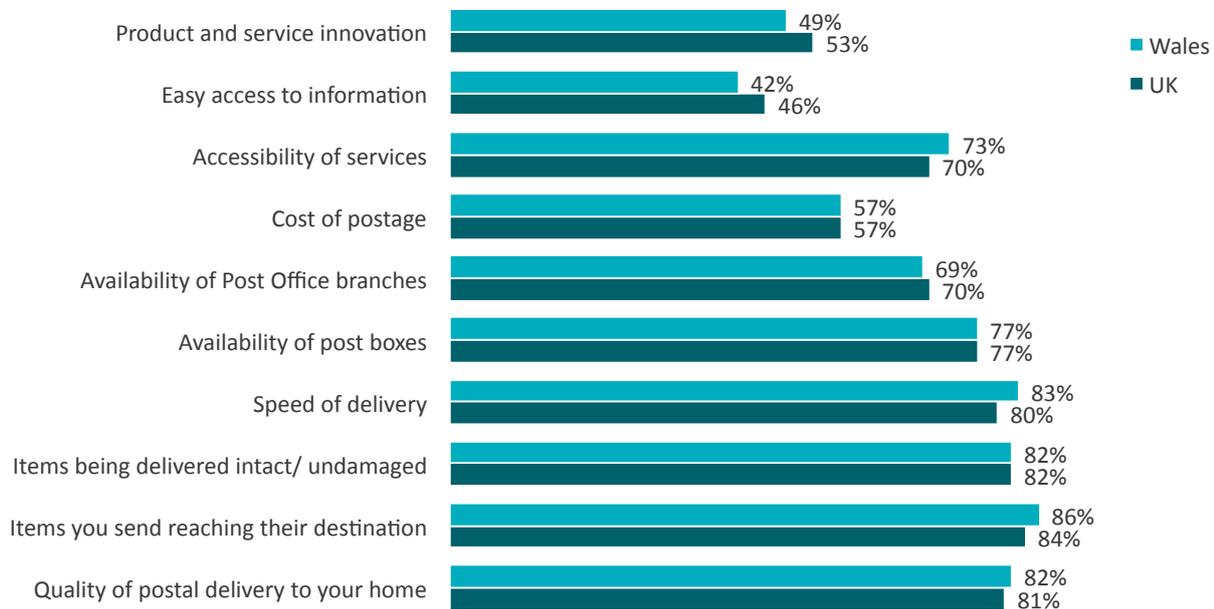
People in Wales are generally satisfied with specific elements of Royal Mail’s service. Specifically, eight in ten or more are satisfied with “items you send reaching their destination” (86%),

“speed of delivery” (83%), “items being delivered intact/undamaged” (82%) and “quality of postal delivery to your home” (82%). Satisfaction is lowest for “product and service innovation” (49%) and

“easy to access information” (42%).

Although not shown in the chart, overall satisfaction with Royal Mail is 84% in Wales. This is in line with satisfaction overall in the UK (83%).

Figure 6.5: Satisfaction with specific aspects of Royal Mail’s service



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 770 Wales)

QG3_1: How satisfied are you with the following aspects of Royal Mail’s service?

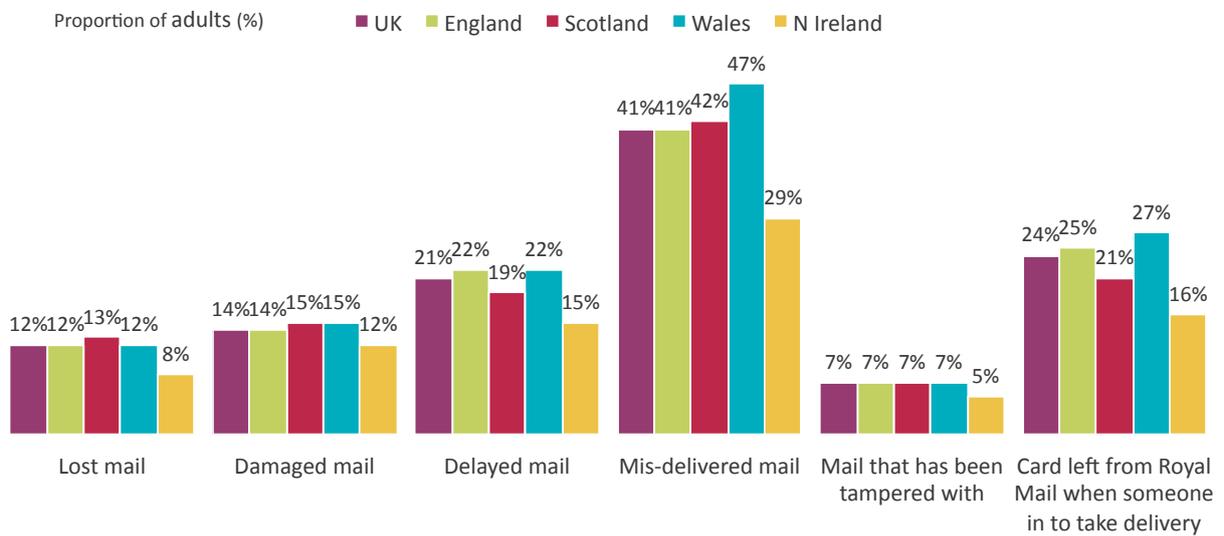
Nearly half of all adults in Wales had experienced a problem with Royal Mail's service, in terms of mis-delivered mail, in the past year

Adults in Wales were provided with a list of potential problems with Royal Mail's service and asked whether they had experienced any of them in the past year. Nearly half (47%) reported that they had experienced problems relating to mis-delivered mail; this is a higher

percentage of people than those who experienced this issue in the UK as a whole (41%). Around a quarter of people in Wales (27%) said that they had experienced a problem with a card having been left from Royal Mail saying that an item could not be delivered,

when someone was at home and could have received the delivery. Just under a quarter (22%) had experienced a problem with delayed mail. The other potential problems were experienced by 15% of people or less.

Figure 6.6: Problems experienced with Royal Mail in the past 12 months



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 4053 England, 857 Scotland, 770 Wales, 739 Northern Ireland)

QD13: Which, if any, of these types of communication are you now using more instead of post, compared to two years ago?

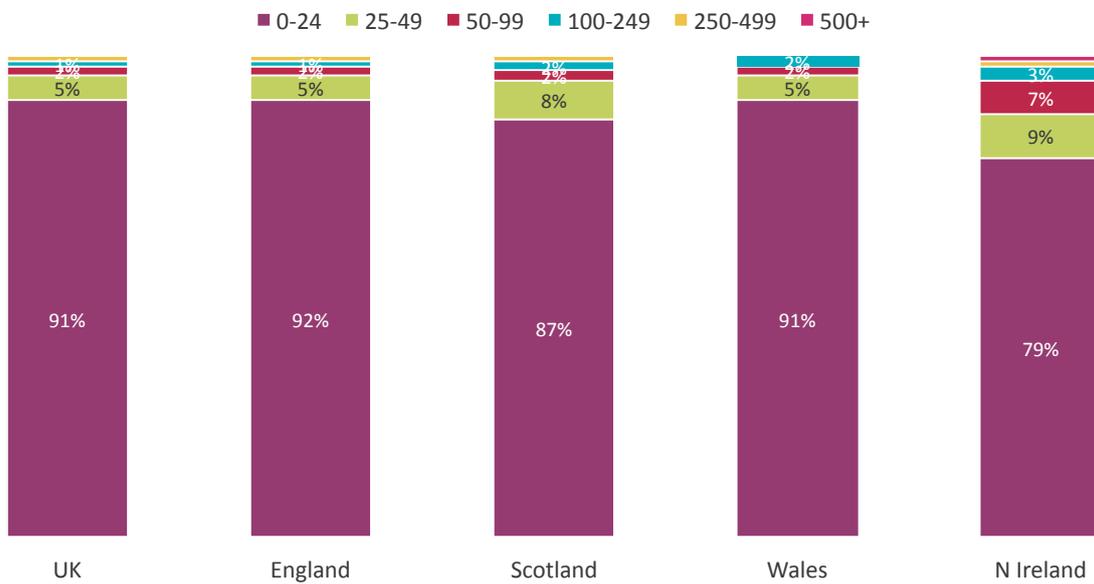
6.3 Sending and receiving post: business customers

The majority of SMEs in Wales send fewer than 25 letters/ large letters per mailing

SMEs in Wales were asked how many letters and large letters they send per mailing as an organisation.

Nine in ten (91%) send 0-24 of these items; this is in line with the UK as a whole (91%).

Figure 6.7: Average volume of letters sent each mailing



Source: Ofcom Business Postal Tracker 2016

Base: All who send letters (n = 1821 UK, 1138 England, 214 Scotland, 241 Wales, 228 N Ireland)

QV2a. On average, how many letter items does your organisation send per mailing? Please think ONLY about all the letters and large letters you may send as an organisation.

Standard stamped mail was the Royal Mail service used by the most SMEs in Wales to send letters/ large letters in the past year

SMEs in Wales which use Royal Mail to send letters or large letters were asked which Royal Mail services their organisation had

used to send these types of item in the past year. Around six in ten SMEs had used first class standard stamped mail (64%) and second

class standard stamped mail (59%). Their use of both of these services was in line with the rest of the UK.

Figure 6.8: Royal Mail services used to send letters and large letters



Source: Ofcom Business Postal Tracker 2016

Base: All respondents who use Royal Mail to send letters or large letters (n = 1781 UK, 1117 England, 211 Scotland, 234 Wales, 219 N Ireland)

QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your letters and large letters?

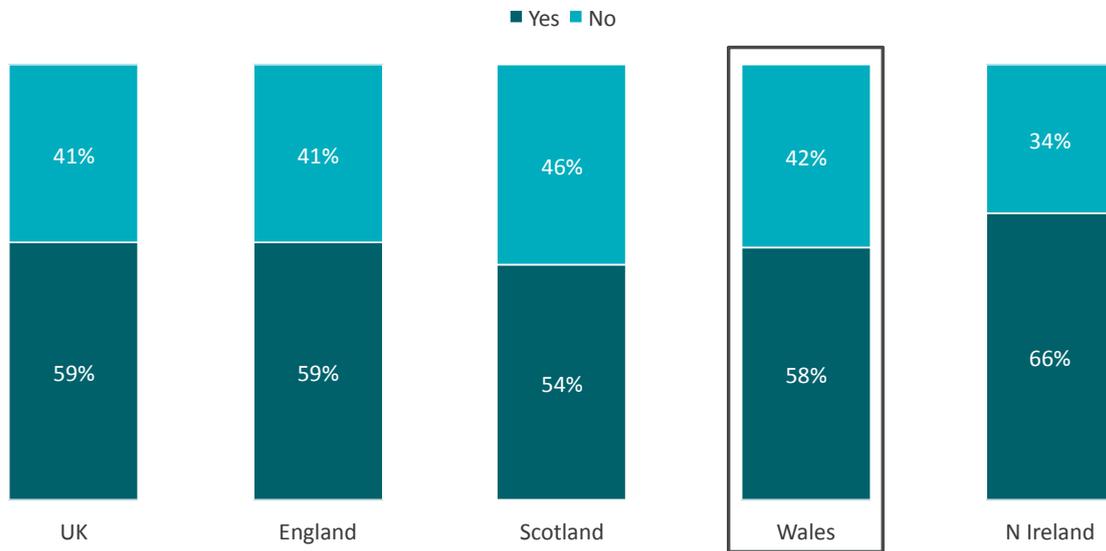
Nearly six in ten SMEs in Wales had switched some mail to other communication methods in the past year

SMEs were asked whether they had switched any of their mail to other communication methods over the past year. Nearly six in ten (58%) in Wales claimed they had moved some of their mail to alternative methods, which is in line with the UK overall (59%).

Although not shown in the chart below, SMEs which had not switched any mail to other communication methods were asked why they had not done so. Around one in five SMEs in Wales said that they were “happy with sending things by post” (22%), or said “no reason” (20%).

Seventeen per cent said “we have already moved everything that it is possible to move” and 11% stated that they “prefer to send things to customers by post”.

Figure 6.9: Switched some mail to other communication methods over past 12 months



Source: Ofcom Business Postal Tracker 2016

Base: All respondents who use Royal Mail to send letters or large letters (n = 1781 UK, 1117 England, 211 Scotland, 234 Wales, 219 N Ireland)

QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your letters and large letters?

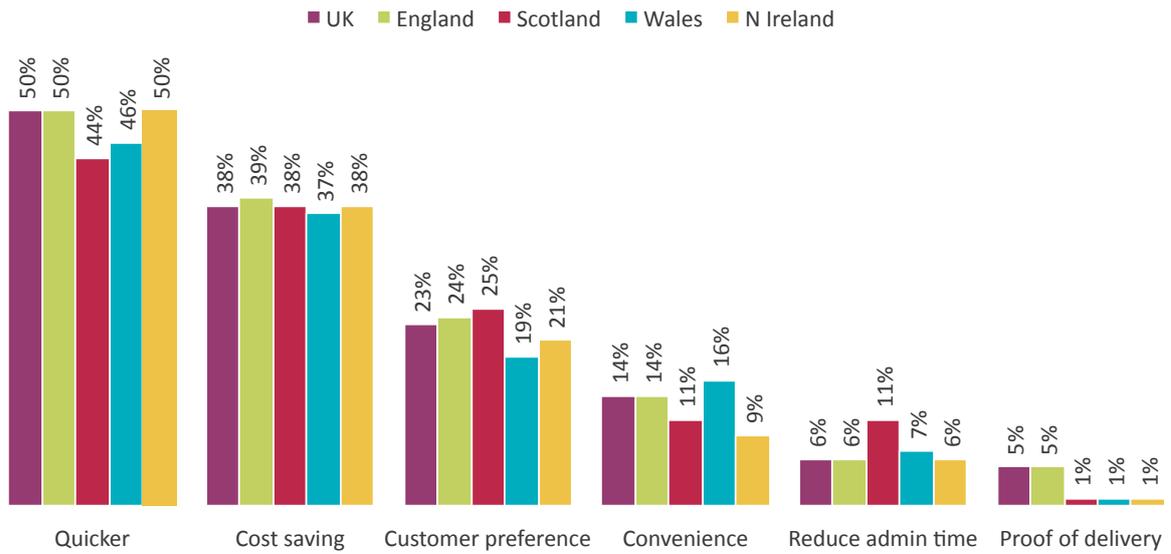
Just under half of SMEs in Wales who switched away from post did so for reasons of speed

Of those SMEs in Wales that had moved some of their mail to alternative methods of

communication, nearly half of them (46%) indicated that this was for reasons of speed. Over

a third (37%) said it was to save cost, while one in five (19%) did so due to customer preference.

Figure 6.10: Main reasons for switching some mail to other communications methods over past 12 months



Source: Source: Ofcom Business Postal Tracker 2016

Base: All who have moved to other communication methods (n = 1207 UK, 751 England, 135 Scotland, 157 Wales, 164 N Ireland)

QF6: Why have you moved some mail to other communication methods? OPEN ENDED Top 6 reasons

6.4 Attitudes towards Royal Mail: business customers

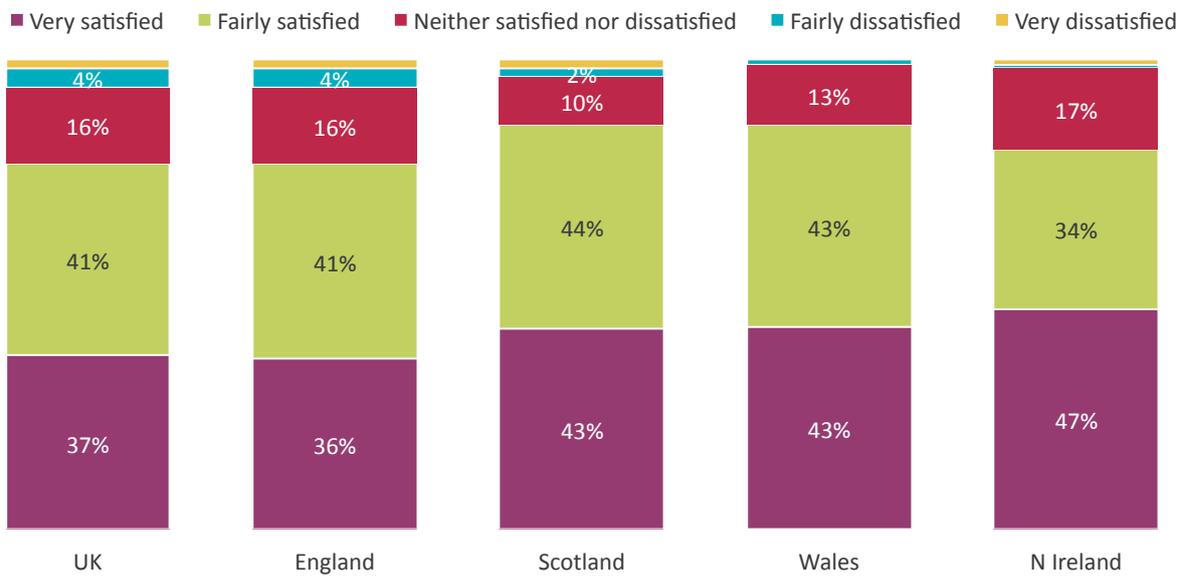
Satisfaction with Royal Mail among SMEs in Wales is higher than the UK average

SMEs were asked about their overall satisfaction with the quality of service they receive from Royal Mail, both as a sender and

as a recipient. In Wales, 86% of SMEs said that they were ‘very satisfied’ or ‘fairly satisfied’. This is higher than the UK overall,

where nearly eight in ten (78%) reported that they were either ‘very satisfied’ or ‘fairly satisfied’.

Figure 6.11: Overall satisfaction with the quality of service from Royal Mail



Source: Ofcom Business Postal Tracker 2016

Base: All respondents who use Royal Mail (n = 1951 UK, 1229 England, 230 Scotland, 256 Wales, 236 Northern Ireland)

QRM2. Thinking generally about the service your organisation receives as a whole, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the overall quality of the services you receive from Royal Mail as a recipient and sender?

Nine in ten SMEs in Wales are satisfied with items being delivered intact/ undamaged

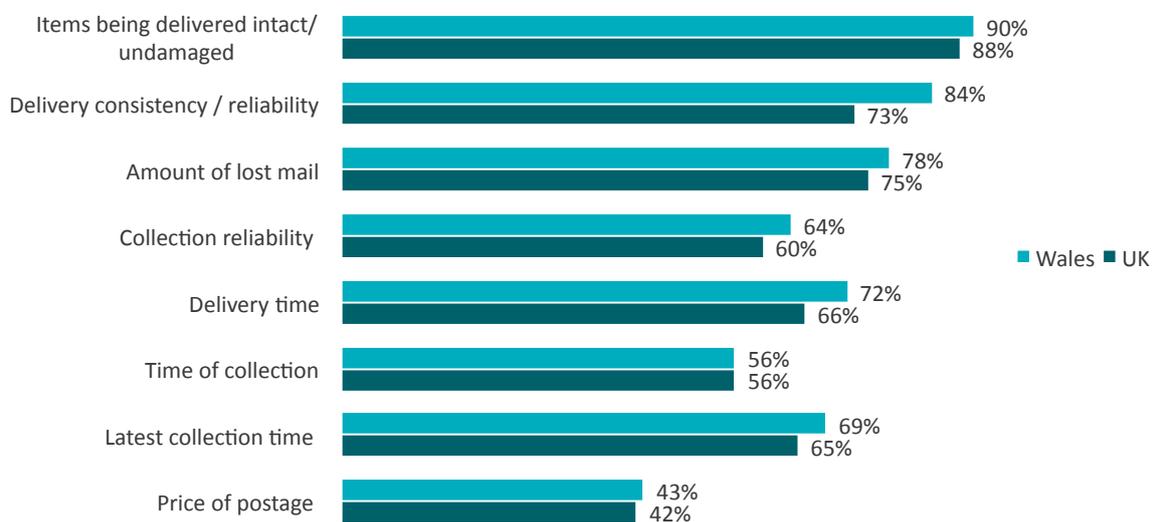
SMEs were also asked about their satisfaction with specific aspects of Royal Mail’s service. Nine in ten SMEs in Wales (90%) said they were satisfied with items being delivered intact/ undamaged. More SMEs in Wales than in the UK overall were satisfied with the consistency/ reliability of deliveries (84% vs. 73%).

More than seven in ten SMEs in Wales reported satisfaction with the amount of lost mail (78%) and delivery time (72%). Four in ten (43%) said they were satisfied with the price of postage.

Although not shown in the chart below, nearly nine in ten SMEs in Wales who use Royal Mail (87%)

said they had had no problems with their service from Royal Mail in the past six months. This measure is higher than for the UK overall (81%) and England (80%), while it is in line with Scotland (87%) and Northern Ireland (82%).

Figure 6.12: Satisfaction with specific aspects of Royal Mail’s service



Source: Ofcom Business Postal Tracker 2016

Base: All respondents who use Royal Mail (n =1951 UK, 256 Wales)

QRM3: How would you rate the performance of Royal Mail, as a recipient and sender, in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?