

6 Post

A note on our postal tracker research

Ofcom Residential Postal Tracker

The residential postal tracker survey is run throughout the course of the year, via face-to-face interviews with 1,946 respondents aged 16+ in the UK. A total of 151 respondents were interviewed in Wales. Postal tracking data in this report is cited as from 2015, with the fieldwork taking place from January to December 2015. In Quarter Three of 2015, we did not conduct any interviews, to allow a review of the survey methodology. For this reason, the samples achieved in Scotland, Wales and Northern Ireland are not directly comparable to previous years' data. The error margins of the sample in Wales are approximately +/- 5-8%.

Ofcom Business Postal Tracker

The business postal tracker survey is run throughout the course of the year, via telephone interviews, among a sample of 1,200 people who are responsible for post in UK SMEs (businesses with 0-249 employees) and 167 SMEs in Northern Ireland. Postal tracking data in this report is cited as from 2015, with the fieldwork taking place from January to December 2015. In Quarter Three of 2015, we did not conduct any interviews, to allow a review of the survey methodology. For this reason, the samples achieved in Scotland, Wales and Northern Ireland are not directly comparable to previous years' data. The error margins of the sample in Wales are approximately +/- 5-8.

6.1 Recent developments in Wales

Parcel surcharging

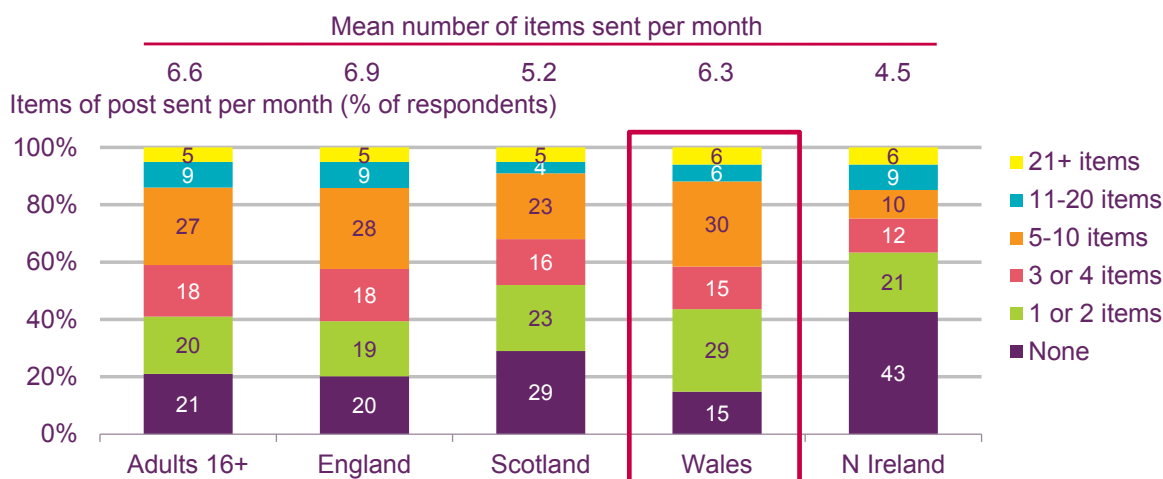
Individuals and consumer organisations continue to highlight that customers in rural, remote or distant locations can be subject to surcharges for parcel delivery, where the parcel falls outside the universal service for which a uniform price is applied. Ofcom is in the process of gathering information to understand the prevalence of these surcharges, to which locations they apply, and whether they are usually levied by retailers or delivery companies. Ofcom expects to set out some of these findings in its annual monitoring update on the postal market.

6.2 Sending and receiving post: residential customers

Almost nine in ten adults in Wales sent at least one item of post each month

Less than one in five (15%) adults in Wales said that they have not sent an item of post in the past month. This compares to 21% in the UK overall and 29% in Scotland. Adults in Wales sent an average of 6.3 items each month, compared to 6.6 items each month in the UK overall. A majority of adults (74%) sent between one and ten items in the past month.

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



Source: Ofcom Residential Postal Tracker 2015

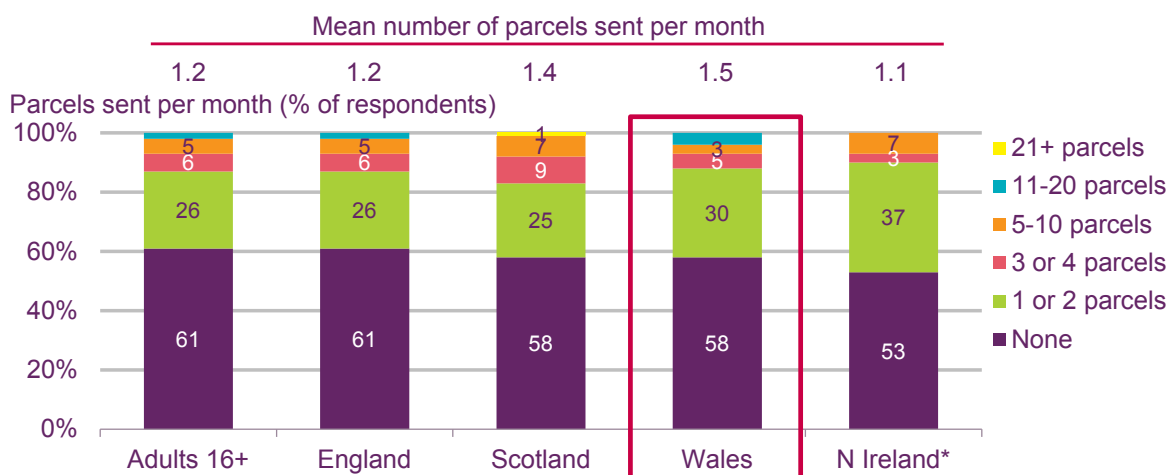
Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland)

QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?

Adults in Wales sent an average of 1.5 parcels per month

Nearly six in ten adults (58%) in Wales said that they sent no parcels in the past month; this is on par with the other nations in the UK. Adults in Wales sent an average of 1.5 parcels per month, again similar to the rest of the UK.

Figure 6.2 Parcels sent in the past month



Source: Ofcom Residential Postal Tracker 2015

Base: All respondents who personally sent any items of post in the last month (n = 1491 adults 16+, 1131 England, 152 Scotland, 127 Wales, 81 Northern Ireland)

QC2. And how many of these items sent in the last month were parcels rather than letters or cards?

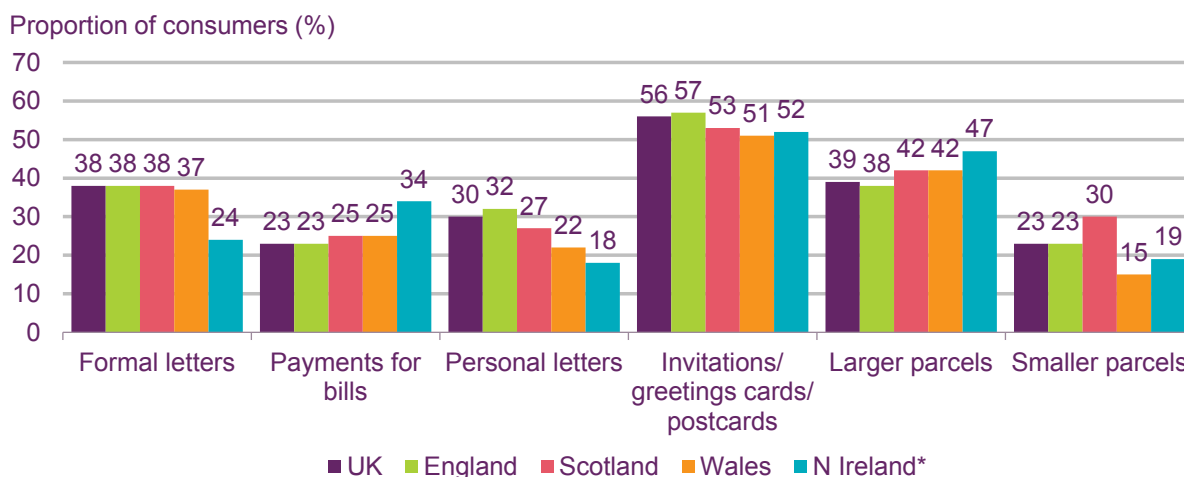
*Caution: Low base

Adults in Wales are less likely to send smaller parcels than those in the UK as a whole

Less than one in five adults in Wales (15%) said they had sent a smaller parcel in the last month. All other types of post sent in the past month were largely in line with the UK

average. As in the other nations, a large proportion of respondents said that they sent invitations, greetings cards and postcards (51%) and larger parcels (42%).

Figure 6.3 Types of post sent in the past month



Source: Ofcom Residential Postal Tracker 2015

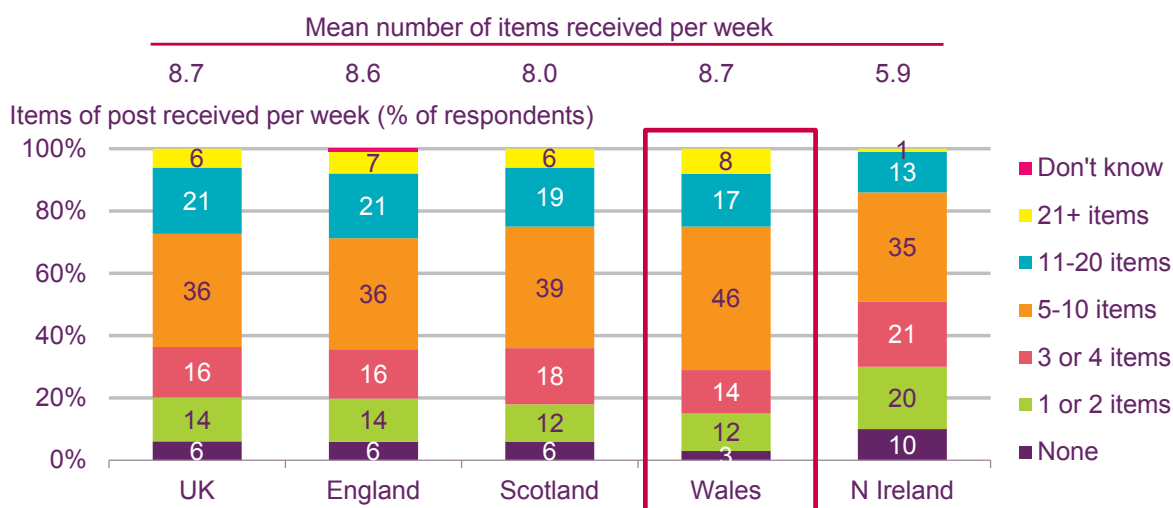
Base: All who have personally sent any items of post in the last week (n = 1491 UK, 1131 England, 152 Scotland, 127 Wales, 81 Northern Ireland)

QC5. Which of these types of mail would you say you have personally sent in the last month by post? (multicode) *Caution: Low base

The number of items received each week in Wales is in line with the UK average

Nearly half of adults in Wales (46%) said that they had received between five and ten items in the past week. Adults in Wales receive an average of 8.7 items of mail each week; this is close to the UK average overall, Scotland and England, but higher than in Northern Ireland.

Figure 6.4 Approximate number of items of post received in the past week



Source: Ofcom Residential Postal Tracker 2015

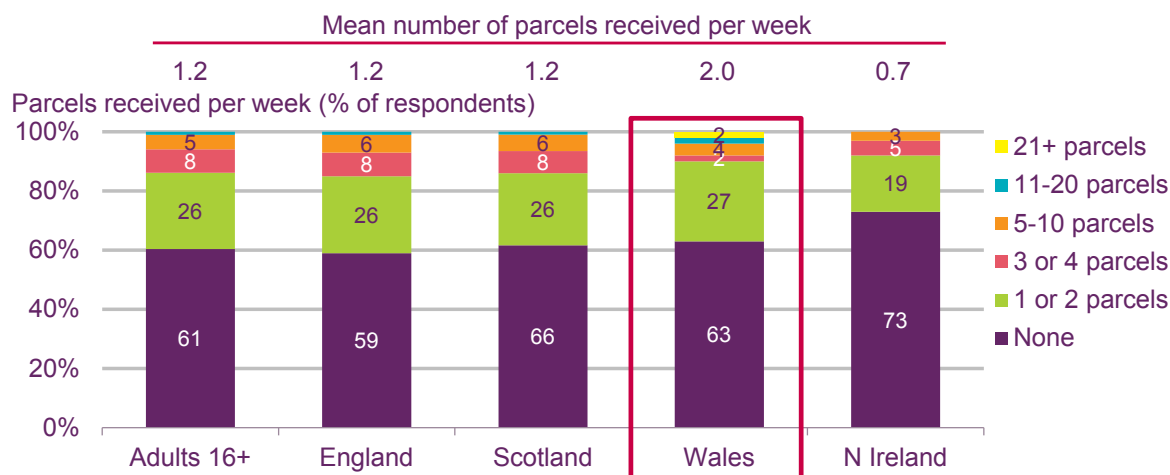
Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland)

QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

Six in ten adults in Wales had not received any parcels in the past week

Just over six in ten adults in Wales (63%) said that they had not received any parcels in the last week, in line with the other UK nations. Just over a quarter (27%) said they had received one or two parcels.

Figure 6.5 Parcels received in the past week



Source: Ofcom Residential Postal Tracker 2015

Base: All respondents who had personally received any items of post in the last week ($n = 1824$ adults 16+, 1258 England, 203 Scotland, 147 Wales, 116 Northern Ireland)

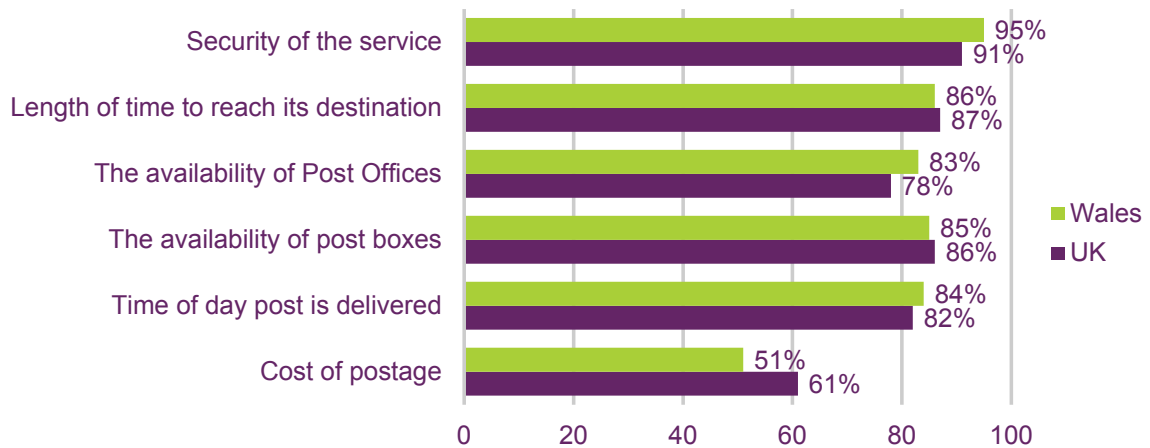
QD2. And how many of these items received in the last week were parcels?

6.3 Attitudes toward Royal Mail: residential customers

Adults in Wales say they are generally highly satisfied with specific aspects of Royal Mail's service

Over nine in ten adults in Wales (95%) say they are satisfied with the security of the service offered by Royal Mail. Nine in ten adults in Wales (86%) are also satisfied with the length of time that post takes to reach its destination. Over eight in ten adults (85%) say that they are satisfied with the availability of post boxes. A similar number of respondents (83%) say they are satisfied with the availability of Post Offices; this is higher than the UK overall average (78%).

Figure 6.6 Satisfaction with specific aspects of Royal Mail's service

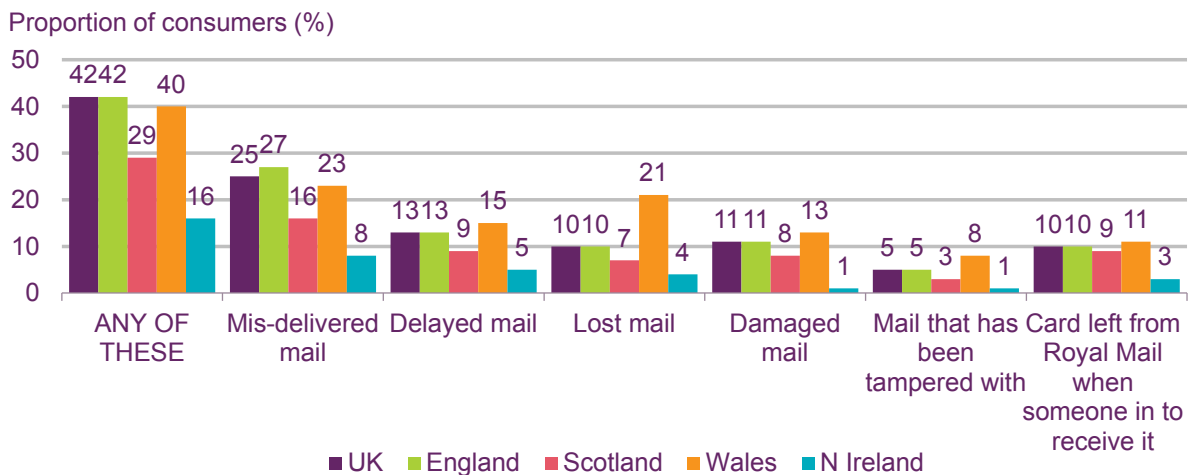


Source: Ofcom Residential Postal Tracker 2015
 Base: All respondents in Wales (n = 1946 UK, 151 Wales)
 QE3A-F. Satisfaction with specific aspects of Royal Mail's services – Ranked by proportion satisfied among adults in Wales

People in Wales report experiencing more problems with lost mail than those in all the other nations

More than one in five adults in Wales (21%) reported problems with lost mail in the past 12 months, more than in all the other nations. Just over one in ten adults (15%) said they had experienced delayed mail, and a similar proportion (13%) said they had had damaged mail.

Figure 6.7 Problems experienced with Royal Mail in the past 12 months



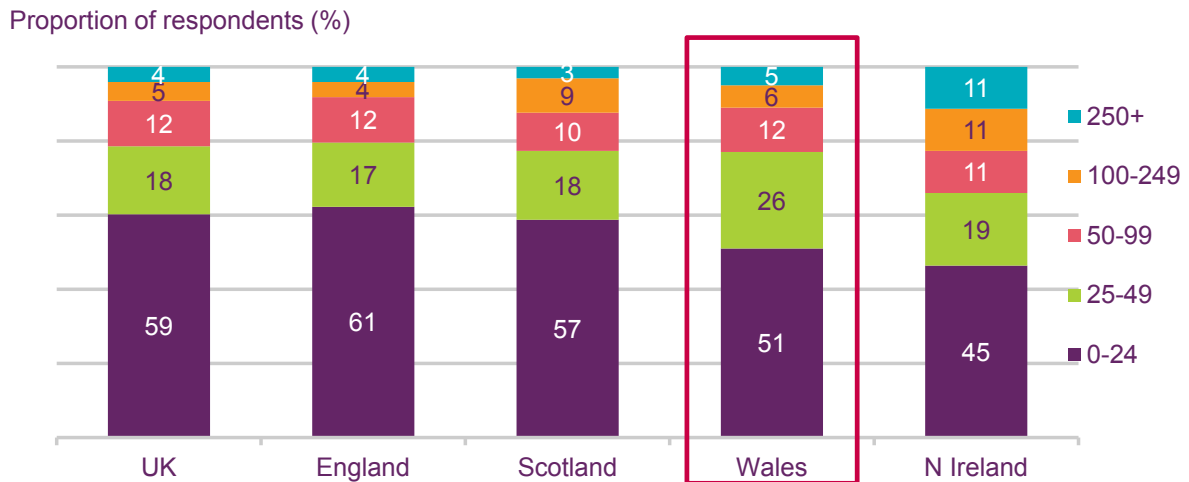
Source: Ofcom Residential Postal Tracker 2015
 Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland)
 QG1A-E. Problems experienced with Royal Mail service in the last 12 months, ranked by proportion among all UK adults. Note: tampered mail is mail that has been subject to a deliberate attempt to identify or steal its contents.

6.4 Sending and receiving post: business customers

Half of businesses in Wales send fewer than 25 letters each month

Businesses were asked how many letters and large letters their organisations send per month on average. Half of businesses (51%) in Wales said they sent between 0 and 24 items per month; this compares to nearly six in ten (59%) in the UK overall. A quarter of businesses (26%) in Wales say they send between 25 and 49 items each month on average; this compares to 18% for the UK overall.

Figure 6.8 Average volume of letters sent each month



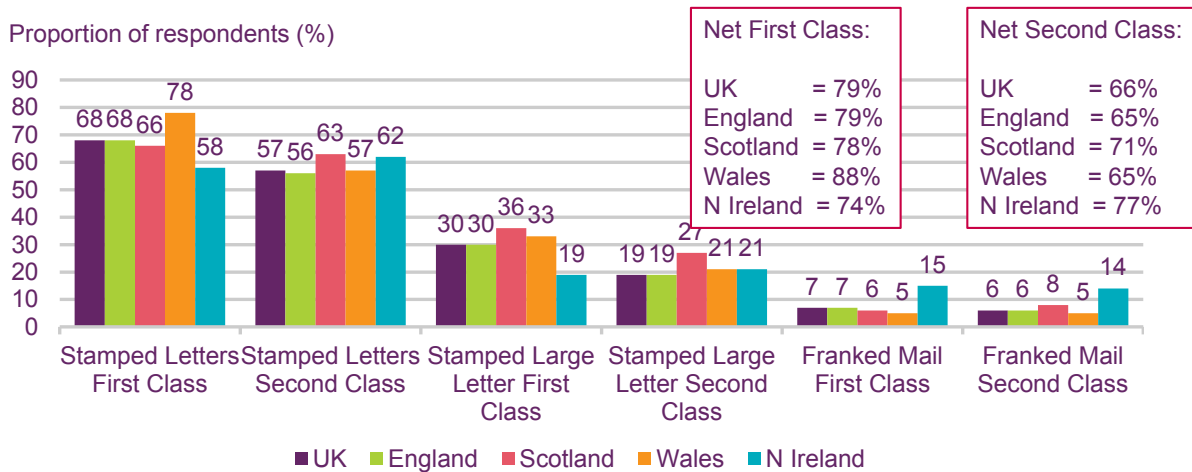
Source: Ofcom Business Postal Tracker 2015

Base : All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N. Ireland) QV2a. On average, how many letter items does your organisation send per month? Please think ONLY about all the letters and large letters you may send as an organisation.

Businesses in Wales use First Class more than those in the other UK nations

Nearly nine in ten businesses in Wales (88%) said that they used First Class services when sending letters (i.e. not tracked or signed for), a higher proportion than in all the other UK nations. Businesses in Wales tend to use other Royal Mail services in similar proportions to the UK average.

Figure 6.9 Royal Mail services used to send standard post each month



Source: Ofcom Business Postal Tracker 2015

Base: All respondents using RM standard delivery services (n = 1121 UK, 686 England, 146 Scotland, 155 Wales, 134 N. Ireland)

QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

Businesses in Wales are among the least likely to have switched from post to another communication method in the past 12 months

Businesses were asked if they had switched some of their mail to other communication methods over the past 12 months. Half of businesses (52%) in Wales claimed they had moved some of their mail to alternative methods.

When asked why they hadn't switched any mail to other communication methods over the past year, the most popular response among businesses in Wales was 'happy with sending things by mail'. The most popular response for the UK as a whole was 'we have already moved everything that it is possible to move'.

Figure 6.10 Switched some mail to other communication methods over past 12 months



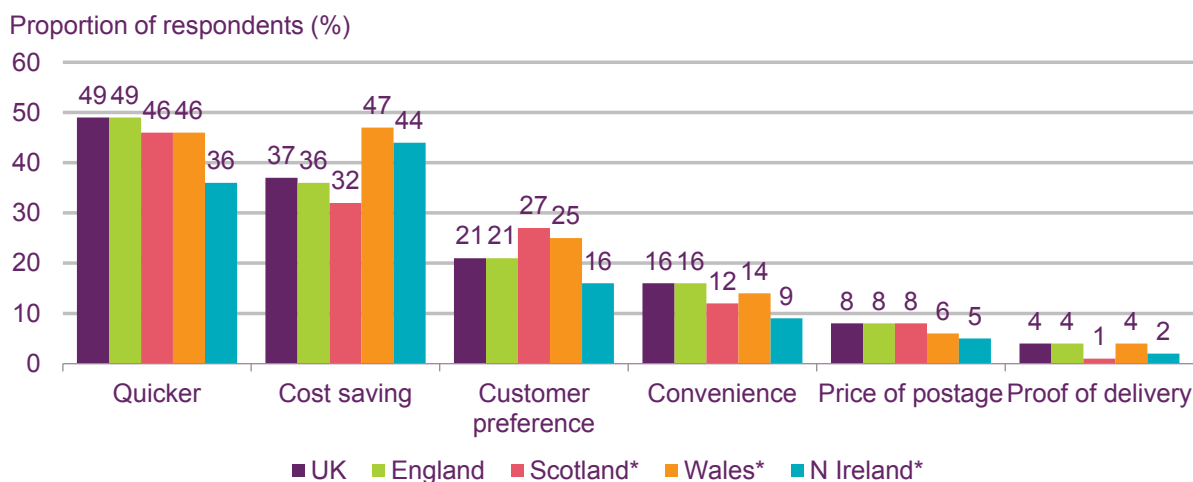
Source: Ofcom Business Postal Tracker 2015

Base: All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N Ireland)
 QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

The most likely reason for switching is cost

Of those businesses that had moved some of their mail to alternative methods of communication, nearly half of them (47%) indicated that this had been a cost-saving decision while a similar percentage (46%) said it was for reasons of speed.

Figure 6.11 Main reasons for switching some mail to other communications methods over past 12 months



Source: Ofcom Business Postal Tracker 2015

Base: All who have moved to other communication methods (n = 720 UK, 452 England, 80 Scotland, 94 Wales, 94 N Ireland)

QF6: Why have you moved some mail to other communication methods? (open ended) Top 6 reasons shown

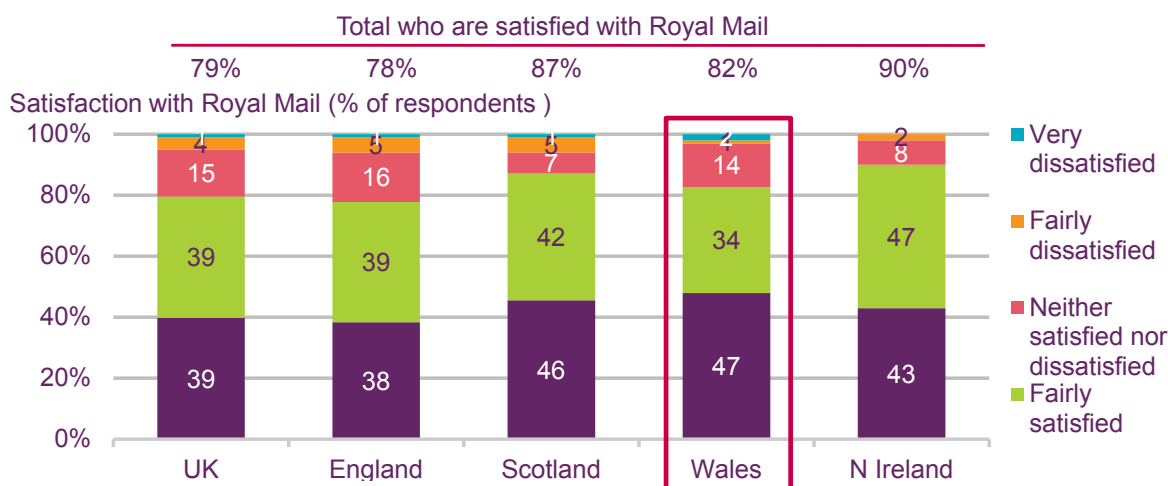
*Caution: Low base

6.5 Attitudes towards Royal Mail: business customers

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

Businesses were asked about their overall satisfaction with the Royal Mail services they used, both as a sender and as a recipient. Eight in ten businesses (82%) in Wales said that they were 'very satisfied' or 'fairly satisfied' with Royal Mail services. The proportion of businesses in Wales who said they were 'very satisfied' (47%) is higher than that in the UK overall (39%).

Figure 6.12 Overall satisfaction with the quality of service from Royal Mail



Source: Ofcom Business Postal Tracker 2015

Base: All respondents who use Royal Mail (n = 1185 UK, 727 England, 155 Scotland, 164 Wales, 139 Northern Ireland)

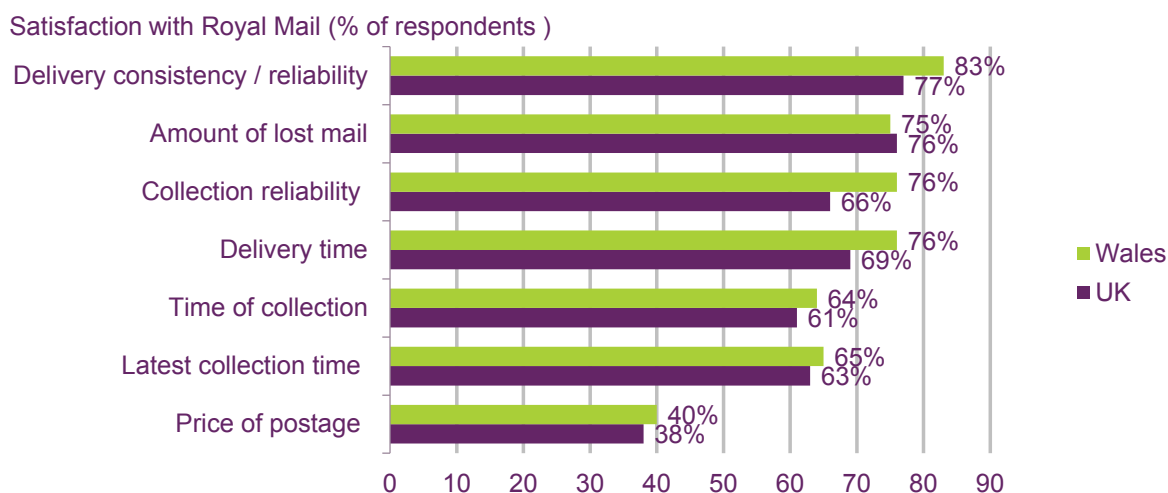
QRM2. Thinking generally about the service your organisation receives as a whole, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the overall quality of the services you receive from Royal Mail as a recipient and sender?

More businesses in Wales than in the UK as a whole are satisfied with collection reliability

More businesses in Wales than in the UK as a whole are satisfied with collection reliability (76% vs. 66%). Four in ten of businesses in Wales (40%) said they were satisfied with the price of postage, similar to the UK overall (38%). Over three-quarters of businesses reported satisfaction with delivery reliability/ consistency (83%), collection reliability (76%), delivery time (76%) and the amount of lost mail (75%).

Among businesses in Wales who use Royal Mail, more than eight in ten (82%) said they had had no problems with their service when sending or receiving mail in the past six months.

Figure 6.13 Satisfaction with specific aspects of Royal Mail’s service



Source: Ofcom Business Postal Tracker 2015

Base: All respondents who use Royal Mail (n = 1185 UK, 164 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?