

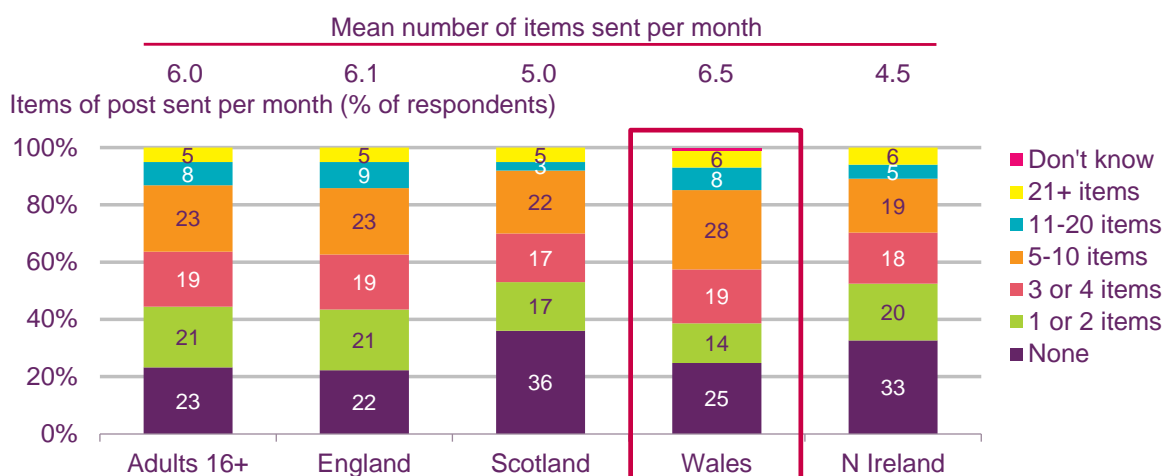
6 Post

6.1 Sending post: residential customers

Adults in Wales send more post than in the UK as a whole

Adults in Wales claim to send 6.5 items of post each month on average; slightly more than the UK average of 6.0 items. One in four people in Wales claimed to have sent no post in the past month, about the same as the UK average of 23%.

Figure 6.1 Approximate number of items of post sent each month

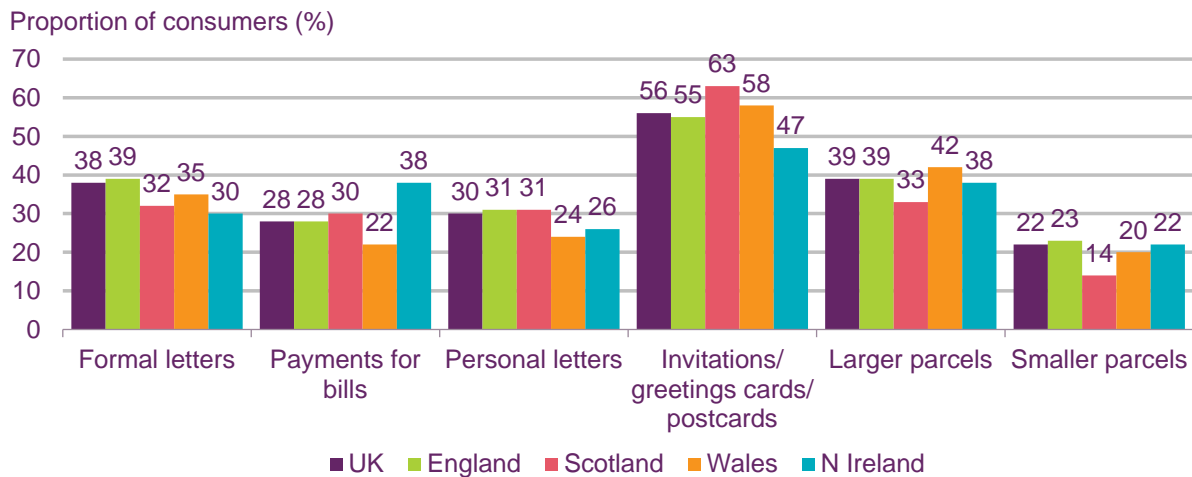


Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015
 Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)
 QC1. Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Adults in Wales are the most likely to have sent parcels in the past month

Figure 6.2 shows that people in Wales are slightly more likely than those in the rest of the UK to have sent parcels in the past month (42% vs. 40% across the UK). In addition, people living in Wales are the least likely of all the nations to have sent payments for bills through the post (22% vs. 28% across the UK).

Figure 6.2 Type of post sent in the past month



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

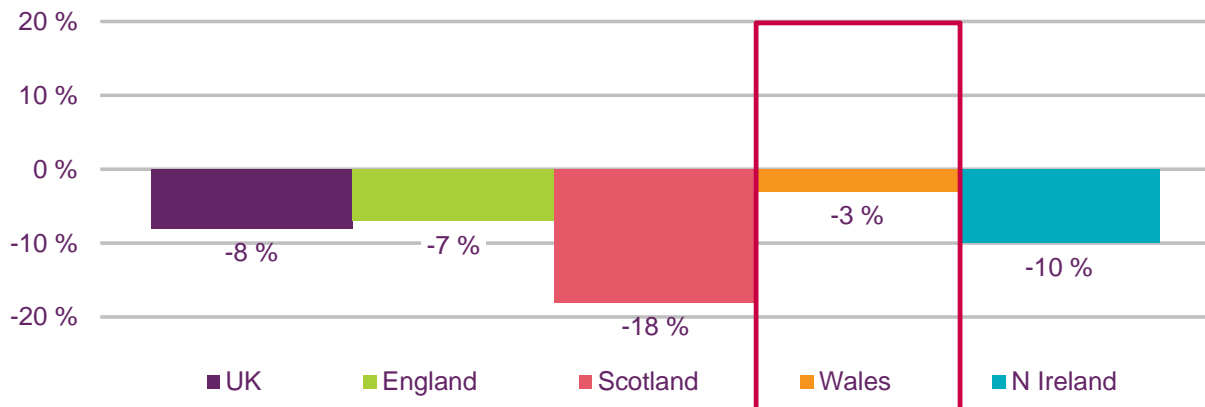
Base: All who have personally sent any items of post in the last week (n = 2685 UK, 1673 England, 382 Scotland, 330 Wales, 300 Northern Ireland)

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

Adults in Wales are the least likely to say they have sent fewer items of post in the last two years

When asked about how the amount of post they send has changed, adults in Wales are less likely than those across the UK to say they now send less (-3% net). Figure 6.4 shows they are also the least likely to predict that they will reduce their use of post in the future (-2% net, compared to -5% across the UK as a whole).

Figure 6.3 Net claimed change in amount of post sent in the past two years



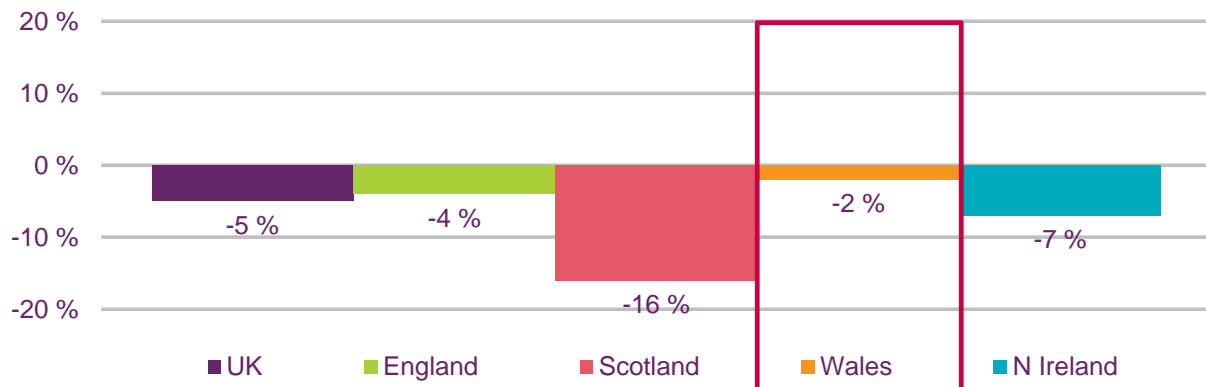
Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 N Ireland)

QC10: Compared with two years ago, would you say that the number of items you send through the post has...increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly?(Multiple choice)

Note: chart shows net (% who claim use has increased - % those who claim use has decreased)

Figure 6.4 Net change in amount of post predicted to be sent in two years' time



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 N Ireland)

QC16: Looking to the future... Compared with now, would you say that the number of letters, cards and parcels you will be sending in the post two years from now will have.....increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly?

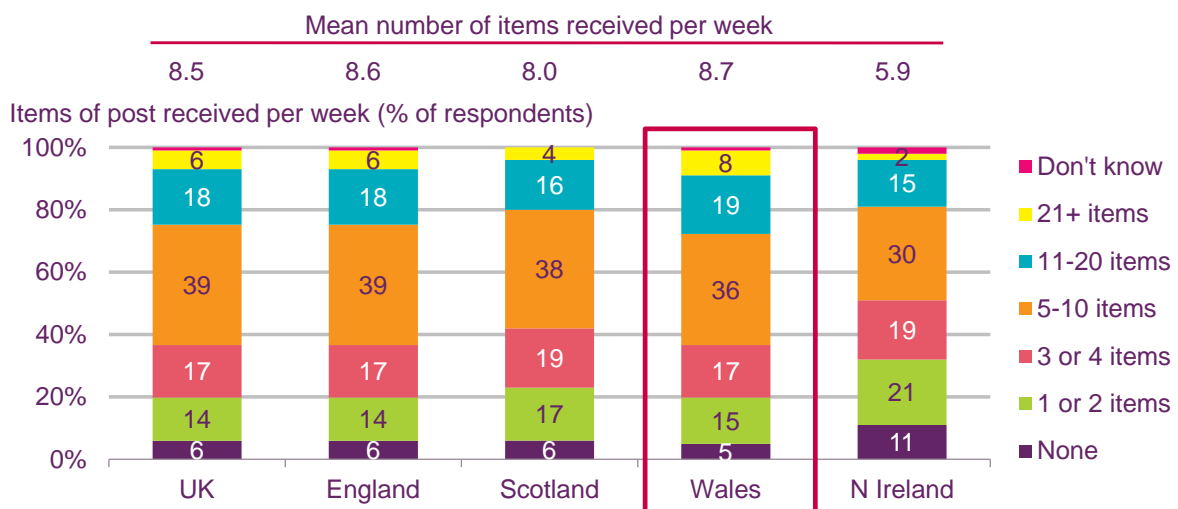
Note: chart shows net (% who claim use will increase - % those who their use will decrease)

6.2 Receiving post: residential customers

The amount of post people receive in Wales is on par with the UK average

On average, people in Wales receive 8.7 items of post each week, similar to the UK average. Around a third of people said they received between five and ten items in the past week, and around a fifth said they received between 11 and 20 items.

Figure 6.5 Approximate number of items received in the post in the past week



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

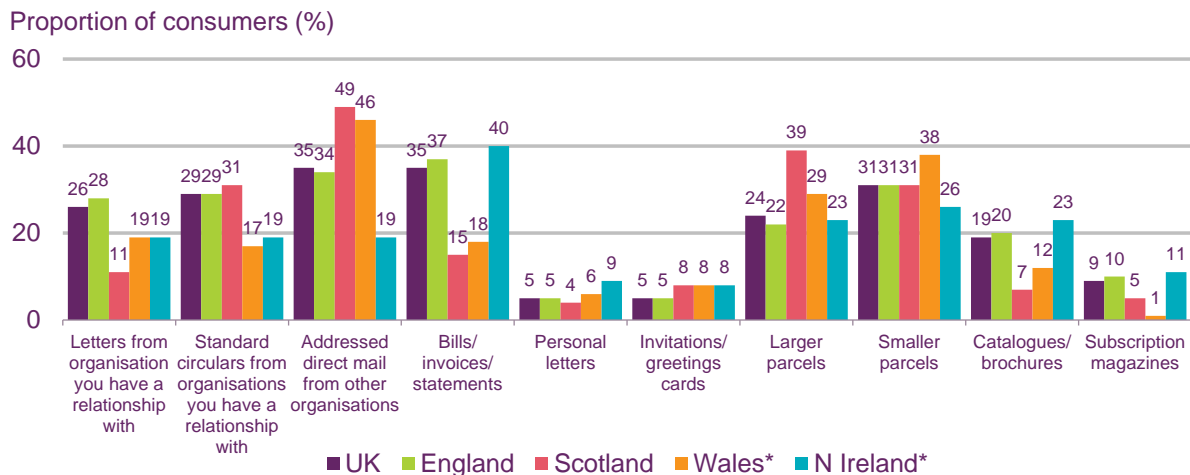
Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)

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

Four in ten of those who have seen an increase in levels of post claim to be receiving more parcels

When asked how the number of post received had changed in the last two years, almost a quarter (22%) overall claimed to receive more items of post than they did two years ago. Figure 6.6 shows that, of these, 41% in Wales claim to be receiving more parcels, compared to 36% overall in the UK. The amount of direct mail people are receiving in Wales has also increased, with 46% of adults in Wales saying that they receive more addressed advertising mail than two years ago. This compares to the UK average of 35%.

Figure 6.6 Type of items being received more often



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents who say that the number of items received by post has increased, compared to two years ago (n = 885 UK, 580 England, 130 Scotland, 98 Wales, 77 Northern Ireland)

QD6. Which of these types of addressed items are you personally receiving more often through the post now? (multicode)

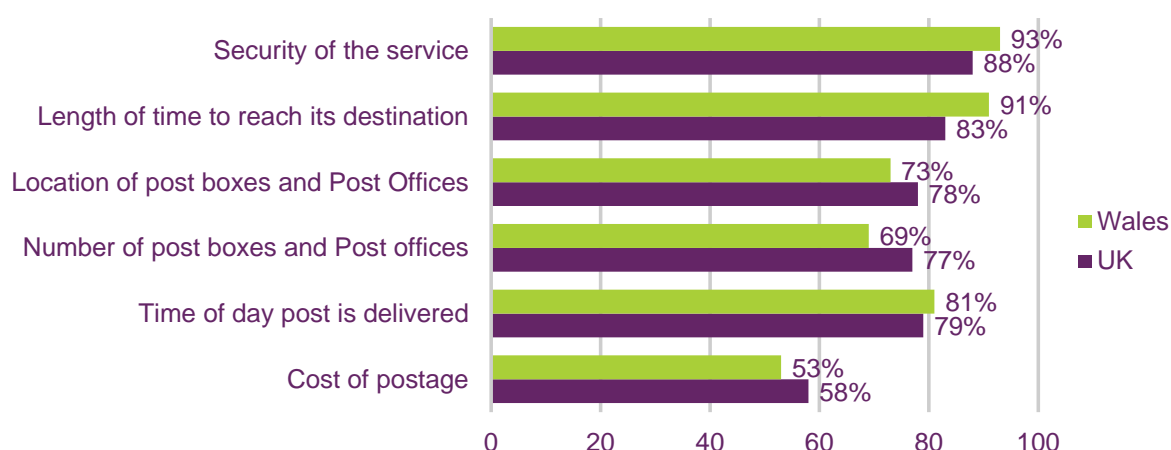
6.3 Attitudes towards Royal Mail

Almost nine in ten of those in Wales are satisfied with Royal Mail

The majority of people in Wales (88%) say they are satisfied with the service received from Royal Mail, compared to 86% across the UK as a whole.

Although satisfaction with specific elements of the postal service is higher in Wales than in the UK as a whole, when considering the cost of postage, just half (50%) of people are satisfied with the cost of postage, significantly lower than the UK average (58%)

Figure 6.7 Satisfaction with specific aspects of Royal Mail's service



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 3557 UK, 418 Wales)

QE3A-F. Satisfaction with specific aspects of Royal Mail's services (very or quite satisfied)

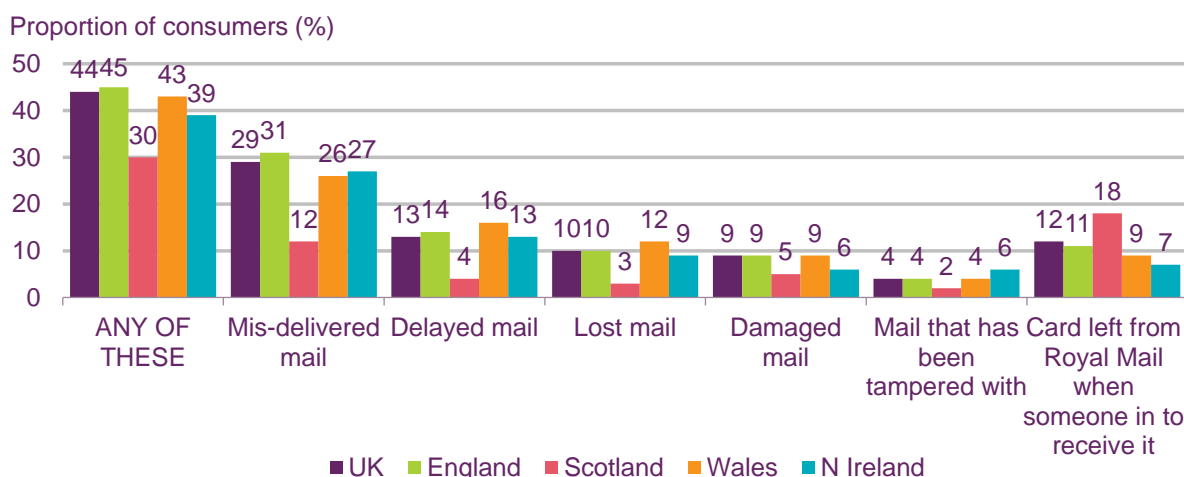
Ranked by proportion satisfied among adults in Wales

One in four adults in Wales claim to have experienced mis-delivered mail in the past year

Over two in five adults in Wales (43%) claim to have experienced a problem with Royal Mail in the past year, among the highest across the UK. A quarter (26%) of those in Wales have experienced mis-delivered mail, in that they have had post incorrectly delivered to their address, or their mail has been delivered to someone else's address.

Experience of delayed mail is higher in Wales than in any of the nations, at 16% of adults in Wales. This compares to the UK average of 13%. Wales also has the highest number of adults claiming that their mail has been lost in the past 12 months (13% vs 10% UK average).

Figure 6.8 Problems experienced with Royal Mail in the past 12 months



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)

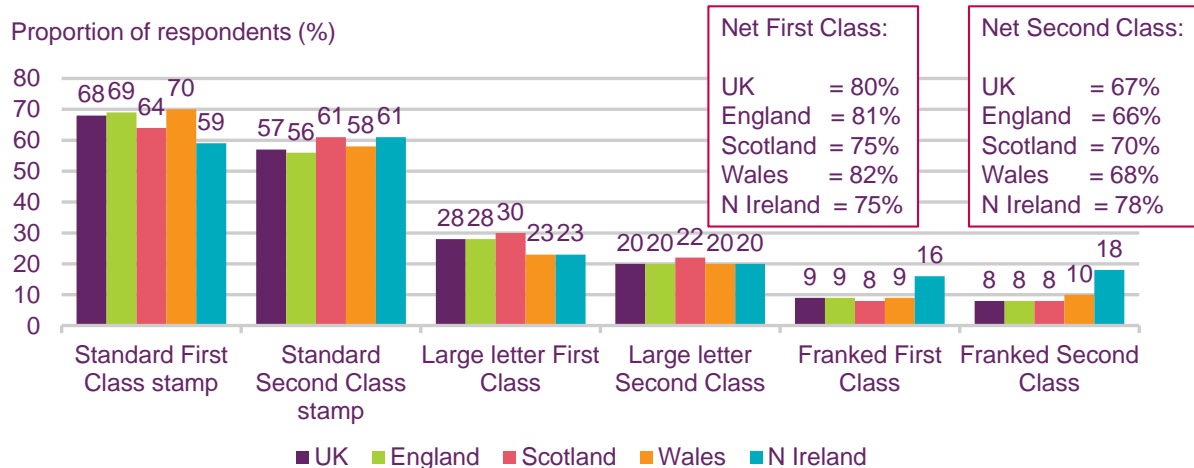
QG1A-E. Problems experienced with Royal Mail service in the last 12 months – Ranked by proportion among all UK adults

6.4 Sending and receiving post: business customers

Organisations in Wales are the most likely to use standard First Class stamps

Seventy per cent of business customers based in Wales say they use standard First Class stamps to send post each month. This is higher than in Scotland (64%) and in Northern Ireland (59%). First Class as a whole (across standard First Class, large letter First Class stamps and franked First Class) is used by more businesses in Wales (82%) than in Scotland and Northern Ireland.

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



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents using RM standard delivery services (n = 1493 UK, 916 England, 205 Scotland, 182 Wales, 190 N Ireland)

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

Over six in ten organisations in Wales say they have switched away from post over the past year

Sixty-two per cent of organisations in Wales say they have switched some of their communications from post to another method in the past 12 months. This is on par with the UK average and lower than in Northern Ireland.

Figure 6.10 Switched some post to other methods over past 12 months

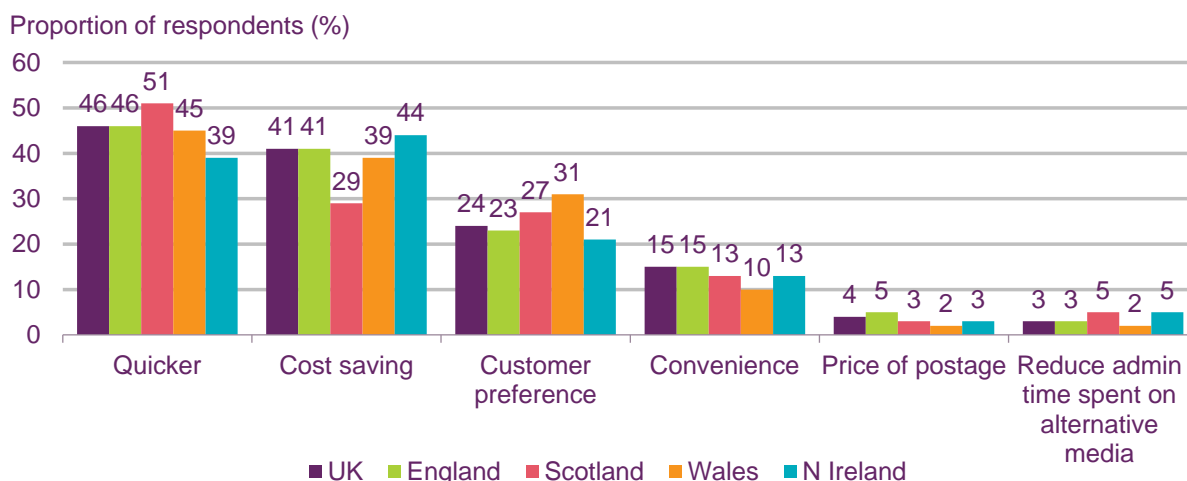


Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015
 Base: All respondents (n = 1591 UK, 973 England, 217 Scotland, 198 Wales, 203 N Ireland)
 QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

Speed is more important than cost saving when considering switching from post

Figure 6.11 shows that, as with businesses across the UK, speed is the most likely reason to switch from post to other methods in Wales (45%). Those in Wales are more likely to say that customer preference is a reason (31%) than those in Scotland (27%), Northern Ireland (21%) or the UK as a whole (34%).

Figure 6.11 Reasons for switching some mail to other methods over past 12 months

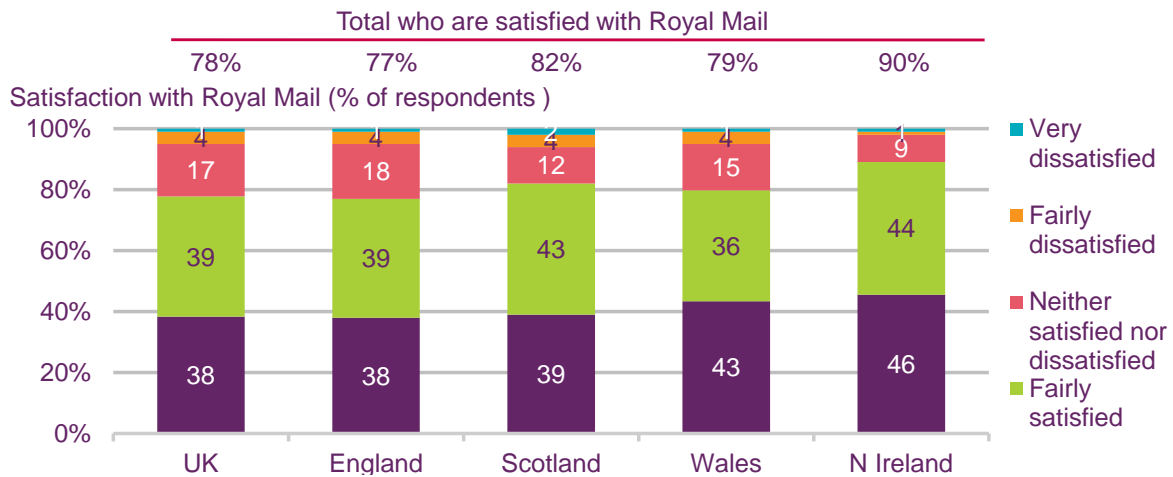


Source: Ofcom Business Postal Tracker, Q2 2013-Q1 2014
 Base: All who have moved to other communication methods (n = 909 UK, 543 England, 123 Scotland, 130 Wales, 113 N Ireland)
 QF6: Why have you moved some mail to other communication methods? Open-ended
 All above 2% across UK shown

Around four-fifths of businesses in Wales are satisfied with the service they receive from Royal Mail

Seventy-nine per cent of business customers in Wales say they are satisfied with the service they receive from Royal Mail; 43% say they are ‘very satisfied’. With the exception of Northern Ireland, Wales had the highest proportion of businesses saying that they were ‘very satisfied’ with Royal Mail.

Figure 6.12 Overall satisfaction with the service from Royal Mail



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

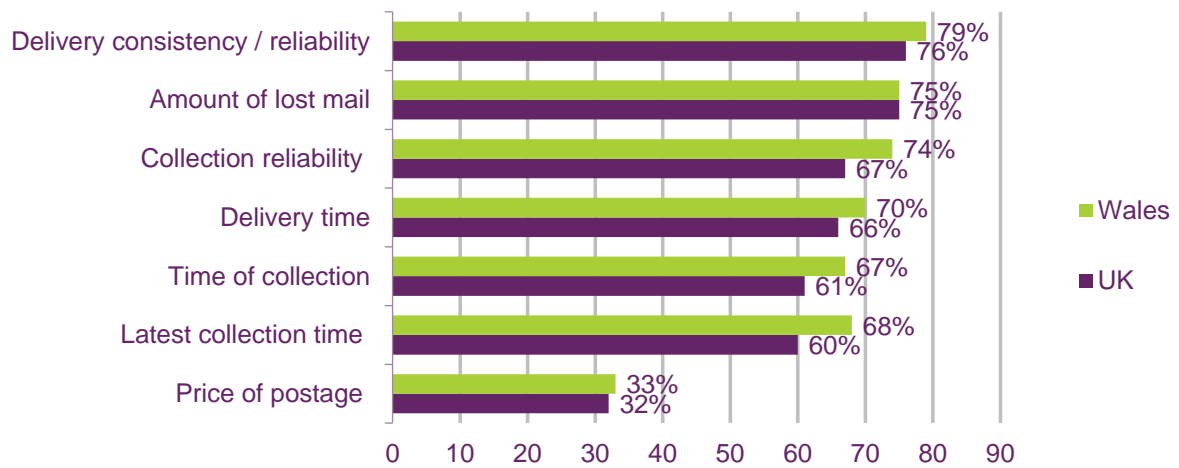
Base: All respondents who use Royal Mail (n = 163 UK, 958 England, 213 Scotland, 195 Wales, 197 Northern Ireland)

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?

Four in five businesses in Wales are satisfied with delivery consistency and reliability

When asked about satisfaction with specific aspects of Royal Mail’s services, businesses in Wales were more satisfied with most aspects of the service than businesses in the UK as a whole. The one exception was with the ‘amount of lost mail’ which was the same as the in the UK overall.

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



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents who use Royal Mail (n = 1563 UK, 195 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?

Ranked by satisfaction levels in Scotland