

6 Post

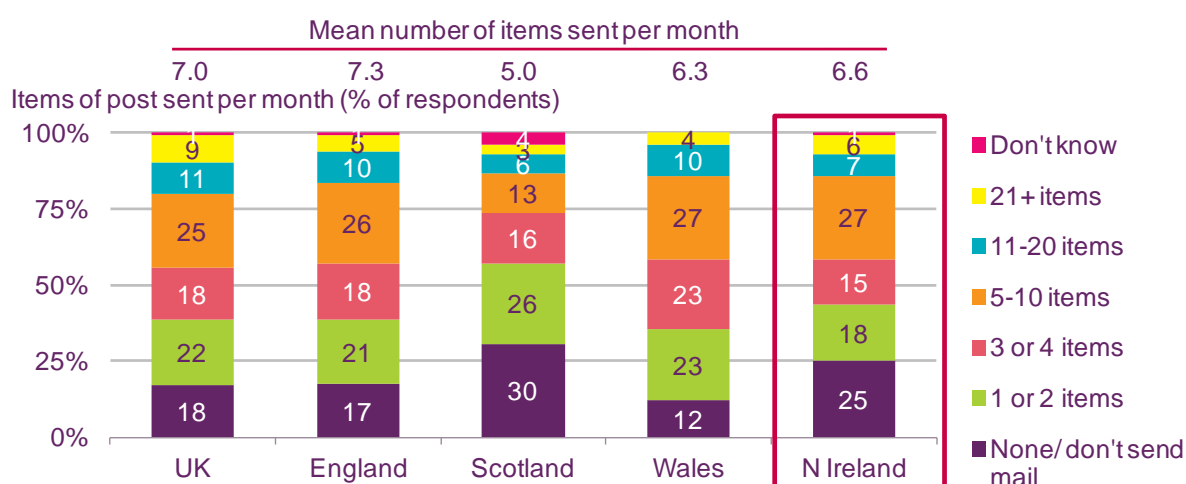
6.1 Sending and receiving post in Northern Ireland – residential customers

One in four residents in Northern Ireland did not send any items through the post in the past month

Adults in Northern Ireland claim to send an average of 6.6 items of post per month. However, when asked how many items they had posted in the past month, a quarter (25%) had not sent anything.

Of those in Northern Ireland who did send post in the past month, 13% sent at least one item to the Republic of Ireland.

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

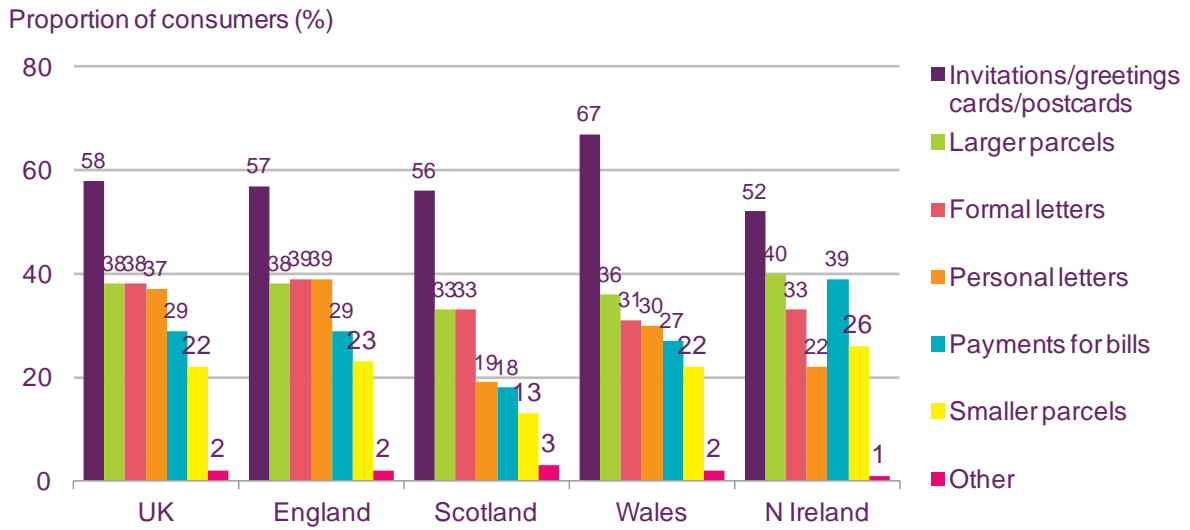


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)
 QC1. Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Adults in Northern Ireland more likely to send payments for bills through the post

Figure 6.2 shows that twice as many people in Northern Ireland as in Scotland had sent postal payments for bills in the past month (39% v 18%). This is in line with findings in the *Ofcom Media Literacy Survey*, which shows lower use of banking and bill payment online compared to the UK overall (27% vs. 39%).

Figure 6.2 Type of post sent in the past month

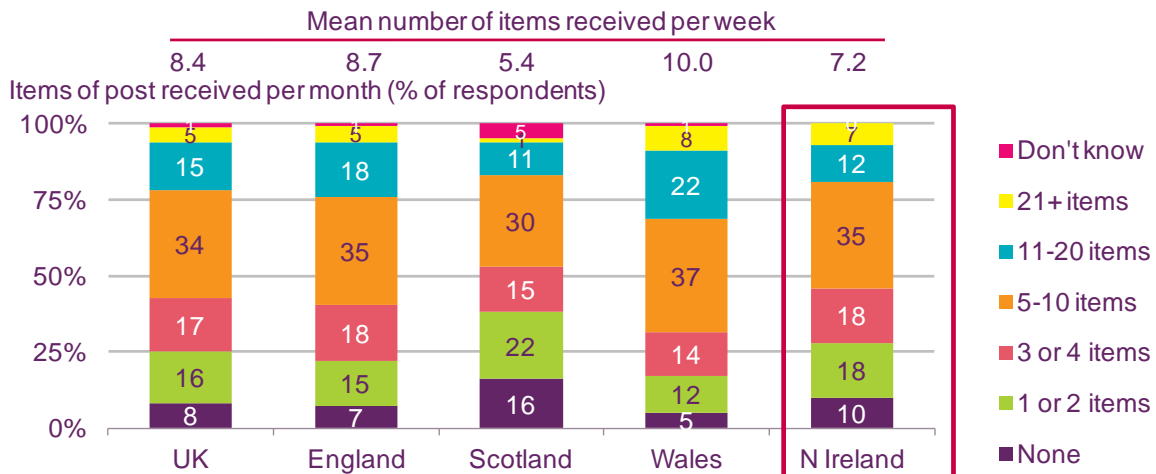


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)
 QC5. Which of these types of mail would you say you have personally sent in the last month by post? (MULTICODE)

Around one in ten adults in Northern Ireland had received no items of post in the past week

When asked to consider items sent to them (Figure 6.3), people in Northern Ireland say they receive around seven items (7.2) each week, with one in ten (10%) receiving no items by post.

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

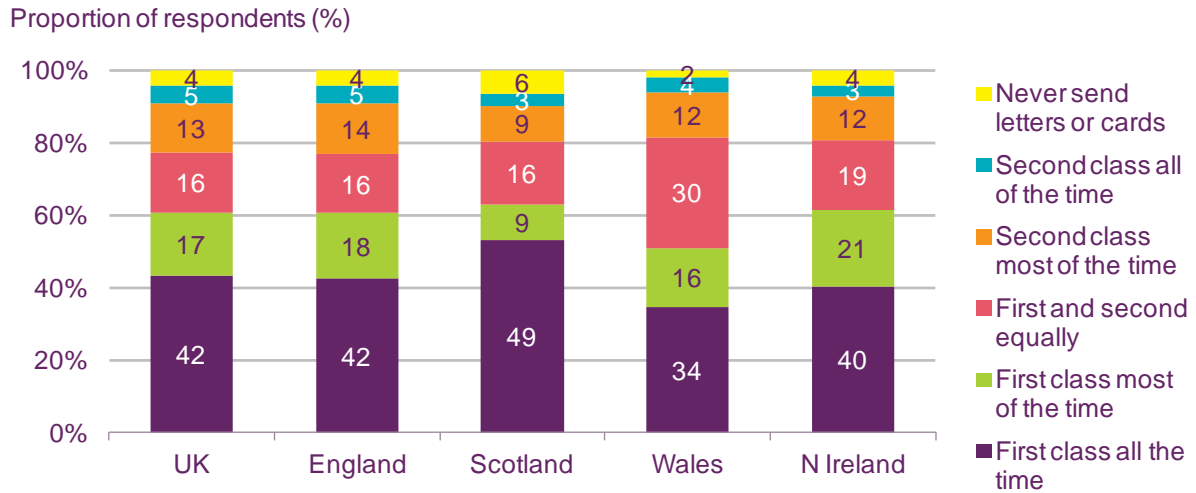


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)
 QD1. Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week?

The majority of people in Northern Ireland use First Class postage when sending items

The majority (93%) of people in Northern Ireland send at least some mail via First Class, with 61% using it most or all of the time. This compares to 89% across the UK as a whole who use a First Class service to send mail.

Figure 6.4 Services used to send items of post



Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland) QF6. When sending letters or cards, which service do you use?

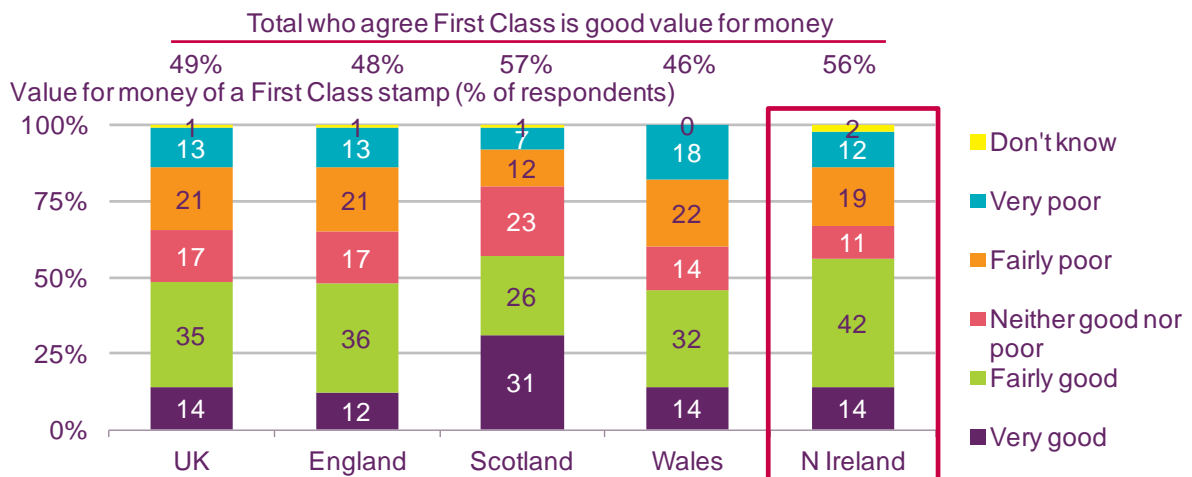
Stamps considered 'good value' by around half of adults in Northern Ireland

Over half (56%) of people living in Northern Ireland think the Royal Mail First Class service for posting standard letters is good value for money. This is particularly high when compared with the equivalent perceptions of value for money in England and Wales (48% and 46% respectively).

Similarly, the Second Class standard letter service is also more widely perceived to be good value for money compared to the UK as a whole (48% v 40%).

When asked about the cost of posting a letter from Northern Ireland to the Republic of Ireland (87p), 47% of people in Northern Ireland think this is poor value for money with only 32% saying it offers good value.

Figure 6.5 Value for money of sending post using a First Class stamp



Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland) QF3. It currently costs 60p to send a standard letter First Class within the UK. How would you rate the Royal Mail's First Class service in terms of value for money?

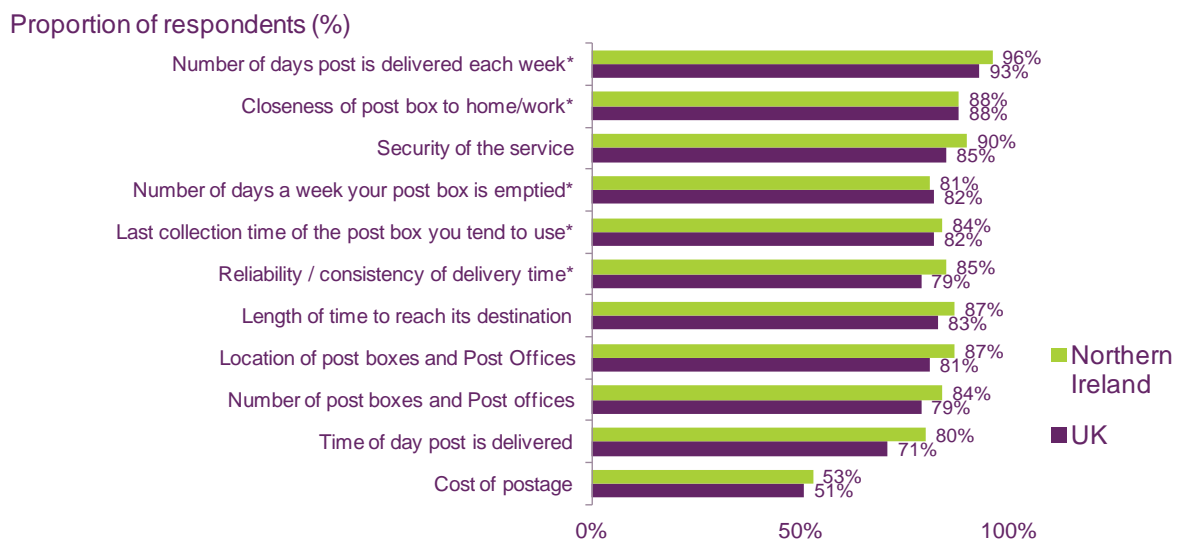
6.2 Attitudes towards Royal Mail

Nine in ten people in Northern Ireland are satisfied with Royal Mail

When asked about their overall level of satisfaction with Royal Mail, the majority of people in Northern Ireland state that they are 'very satisfied' or 'fairly satisfied' (92% v 85% in the UK overall).

Looking at respondents' satisfaction with specific aspects of the service (Figure 6.6), this seems to be primarily driven by satisfaction with delivery times, such as the time of day post is delivered (80% v 71% across the UK) and the reliability of the delivery time (85% v 79%).

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

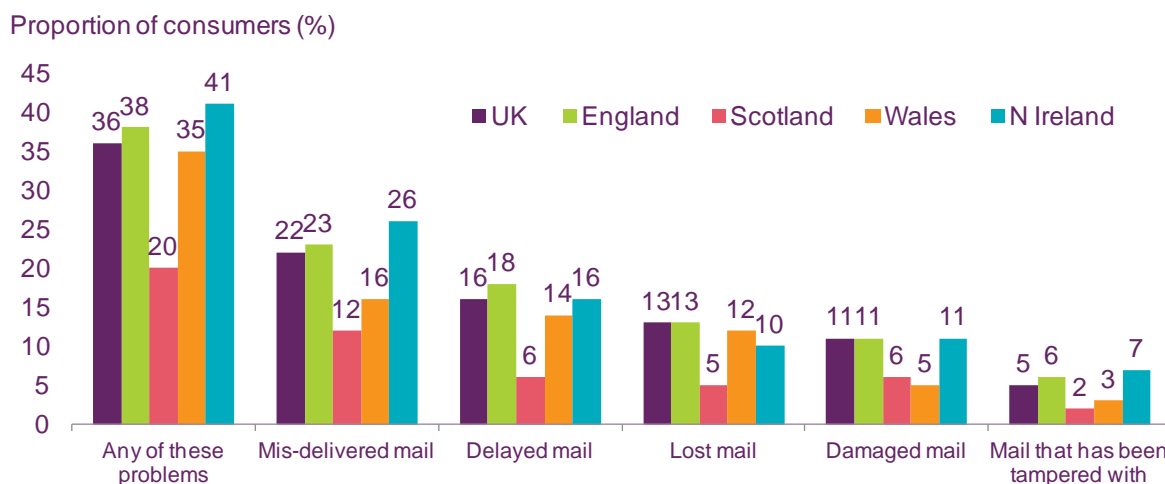


Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013
 Base: All respondents (n = 4844 UK, 697 N Ireland)
 QE3A-K: SHOWCARD - SATISFACTION WITH ASPECTS OF ROYAL MAIL'S SERVICE
 *Base: All respondents (from Q1 2013) (n = 2397 UK, 329 N Ireland)

More than one in four customers in Northern Ireland have experienced a problem with mis-delivered post in the past year.

The higher levels of satisfaction with Royal Mail in Northern Ireland are despite the finding that customers in Northern Ireland are more likely to have experienced problems with Royal Mail in the past year. In particular, more than one in four adults in Northern Ireland (26%) say they have had a problem with mis-delivered mail, compared to 16% in Wales and 12% in Scotland. This is post that has been incorrectly delivered to their address, or post for them that has been delivered to someone else's address.

Figure 6.7 Problems experienced with Royal Mail in past 12 months



Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)
 QG1A-E: Experience of problems with Royal Mail service in the last 12 months (PROMPTED LIST)

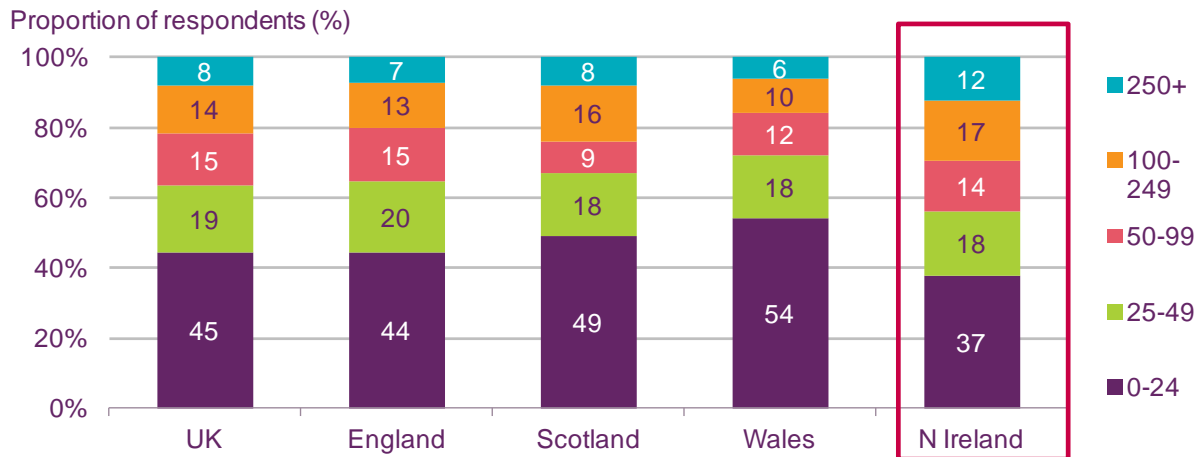
6.3 Sending and receiving post – business customers

Over half of organisations in Northern Ireland say post is ‘core’ or ‘critical’ to their business

When asked about the role of post within their organisation, 53% of organisations on Northern Ireland say it is ‘core’ or ‘critical’ to their business (compared to 49% across the UK as a whole).

This is reflected in the volume of post sent (Figure 6.8); 29% of businesses send over 100 items of post each month, compared to 22% across the UK as a whole.

Figure 6.8 Average volume of letters sent each month



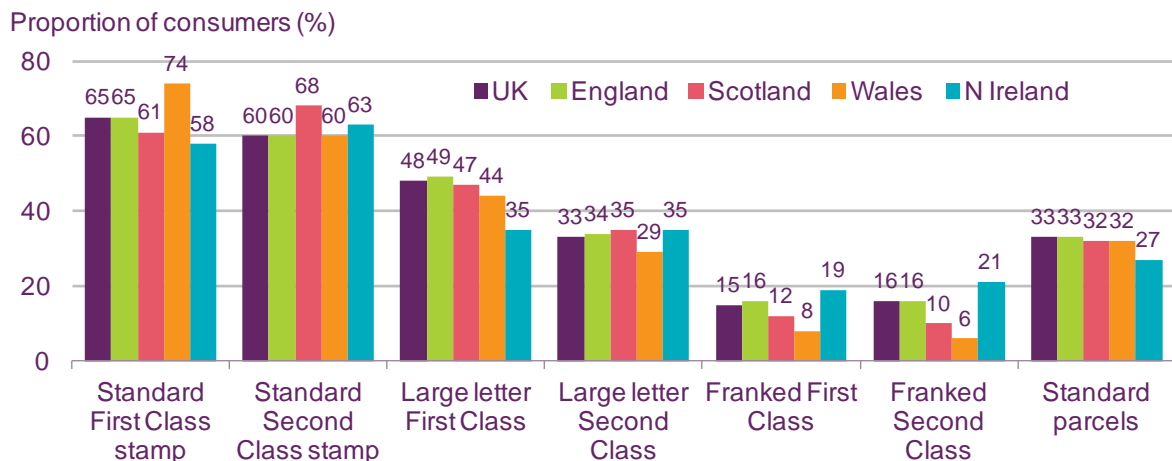
Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 1604 UK, 1023 England, 214 Scotland, 193 Wales, 174 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.

Business customers in Northern Ireland are more like to use a franking machine to send mail, compared to the other devolved nations

As with the rest of the UK, First and Second Class stamps are used most often to send business post in Northern Ireland. However, business customers here are much more likely than organisations in the other devolved nations to frank some of their post each month, with 19% using franked First Class and 21% using franked Second Class.

Figure 6.9 Royal Mail services used to send letters each month



Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base: All respondents using RM standard delivery services (n = 1460 UK, 934 England, 197 Scotland, 168 Wales, 161 N Ireland)

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