

ICMR 2015: Post

Chart pack

Figure 7.1

Industry metrics and summary

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN
Letter mail volume (billion items)	12.7	13.6	15.7	3.8	150.2	18.1	4.3	3.6	3.5	2.4	1.8	0.6	4.3	8.3	3.1	5.6	26.7
Letter mail revenue (£bn)	4.3	6.7	6.9	2.6	28.9	10.5	1.2	1.1	2.0	1.0	0.7	0.1	1.6	2.1	0.6	0.4	1.6
Letter mail volume per capita	197	211	191	62	471	143	183	75	210	253	46	118	87	41	21	4	20
Letter mail revenue per capita (£)	66.0	103.9	83.3	42.0	90.6	82.3	52.3	22.7	118.6	104.6	17.2	21.6	33.2	10.3	3.9	0.3	1.2
Standard (C5) domestic stamp price (£)	0.63	1.53	1.17	1.94	0.98	0.80	0.77	0.74	1.67	1.24	0.45	0.29	n/a	0.48	0.79	0.25	0.59

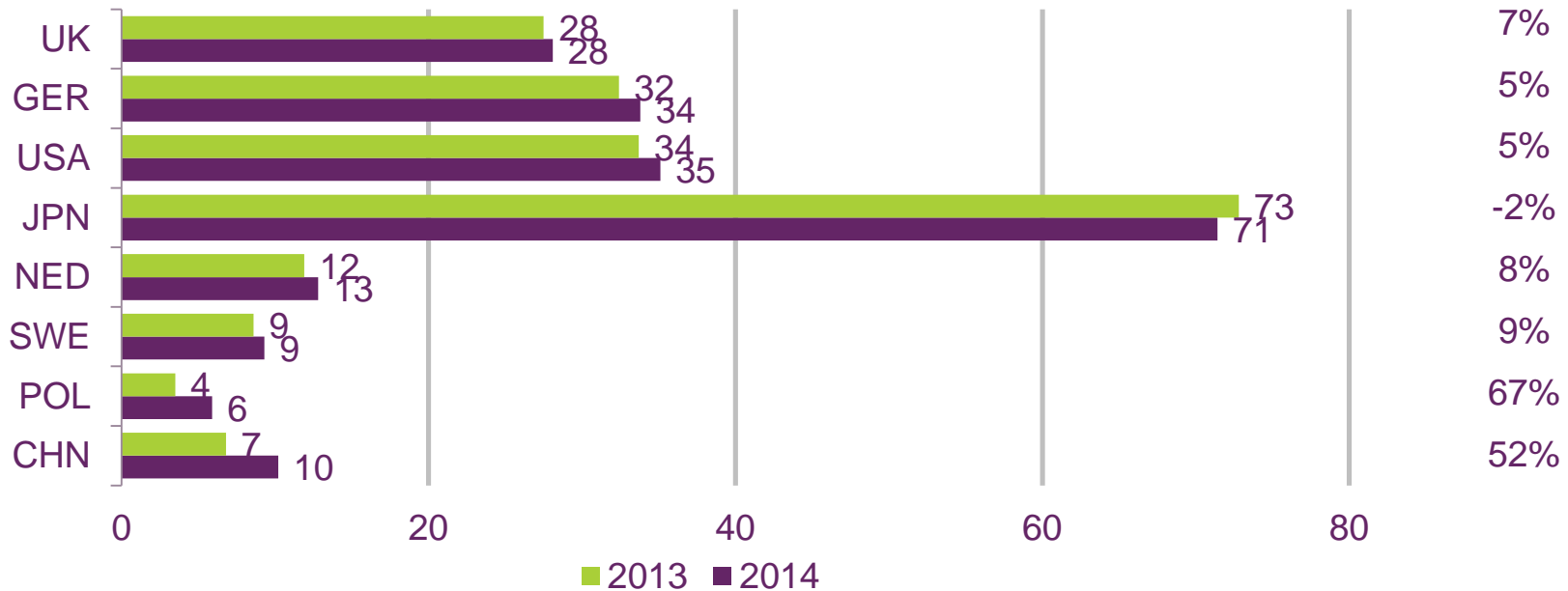
Source: WIK / Ofcom analysis

Figure 7.2

Parcel volume per head of population: 2013-2014

Volume per head

Parcel volume
Year-on-year growth

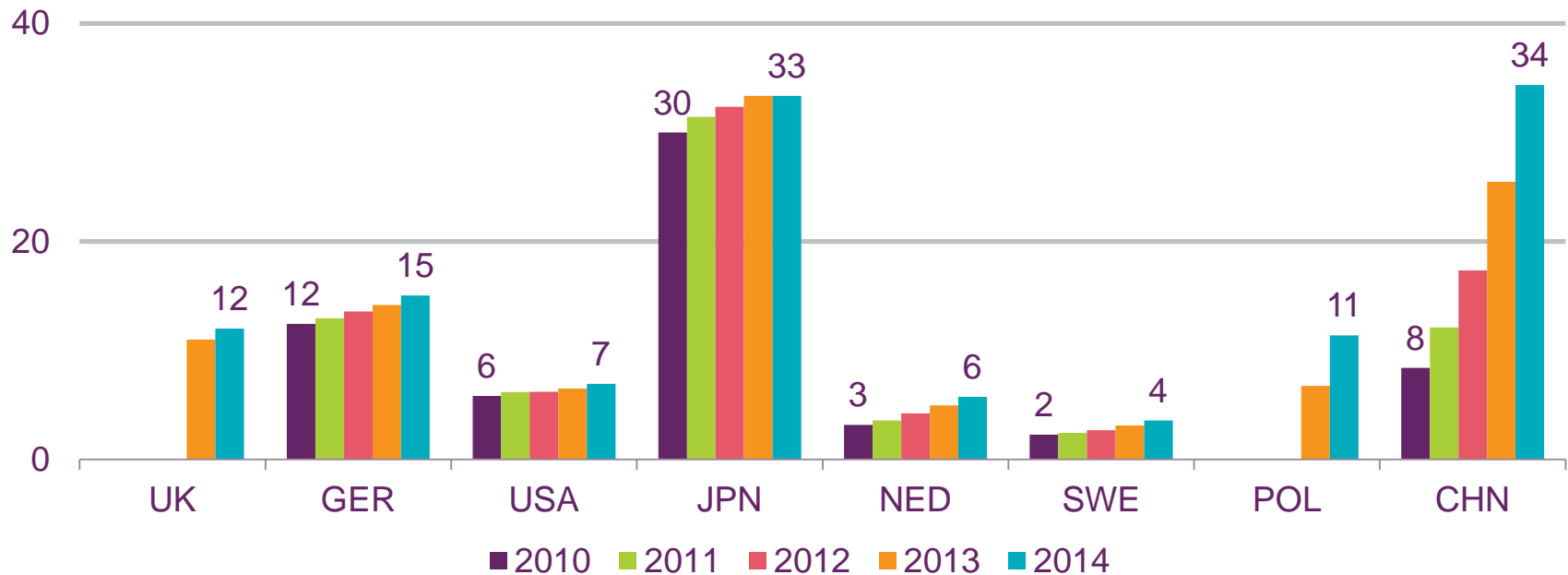


Source: WIK / Ofcom analysis

Figure 7.3

Proportion of parcels in total mail volume: 2010-2014

Proportion of parcels in total mail (%)

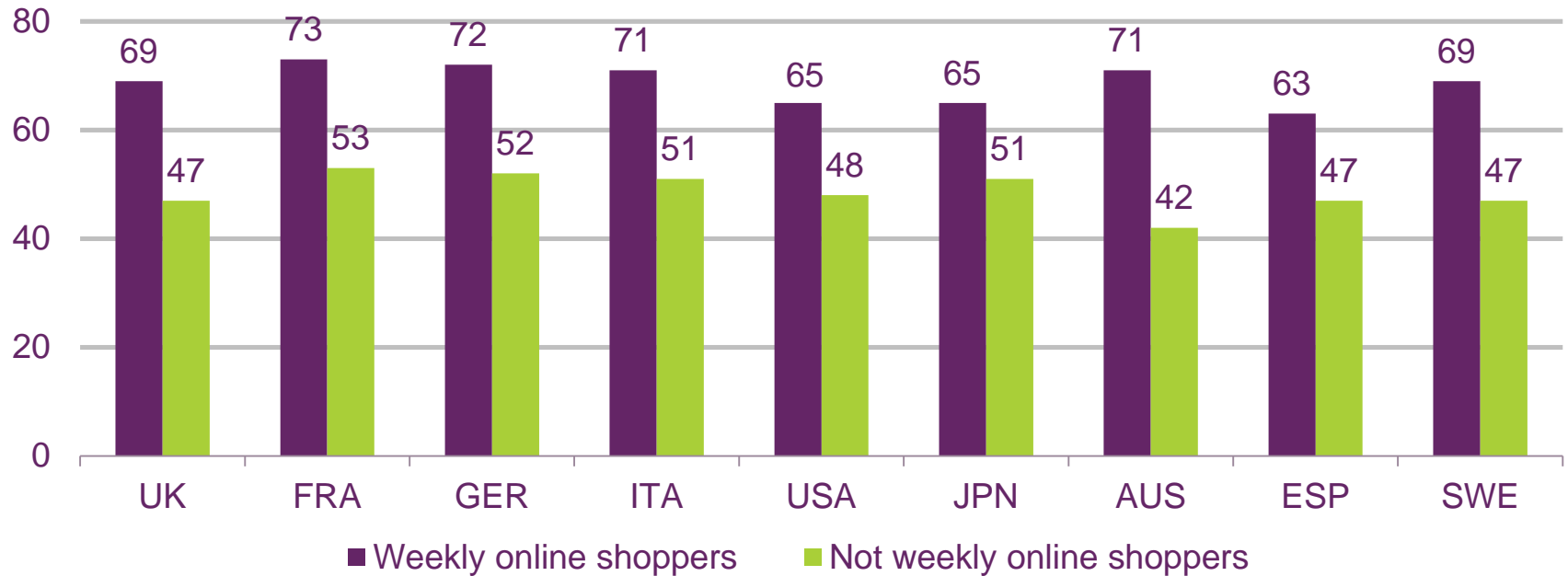


Source: WIK / Ofcom analysis

Figure 7.4

Proportion of regular online shoppers and who had received a parcel in the last week compared to those who are not regular online shoppers

Respondents who received a parcel in the last week (%)

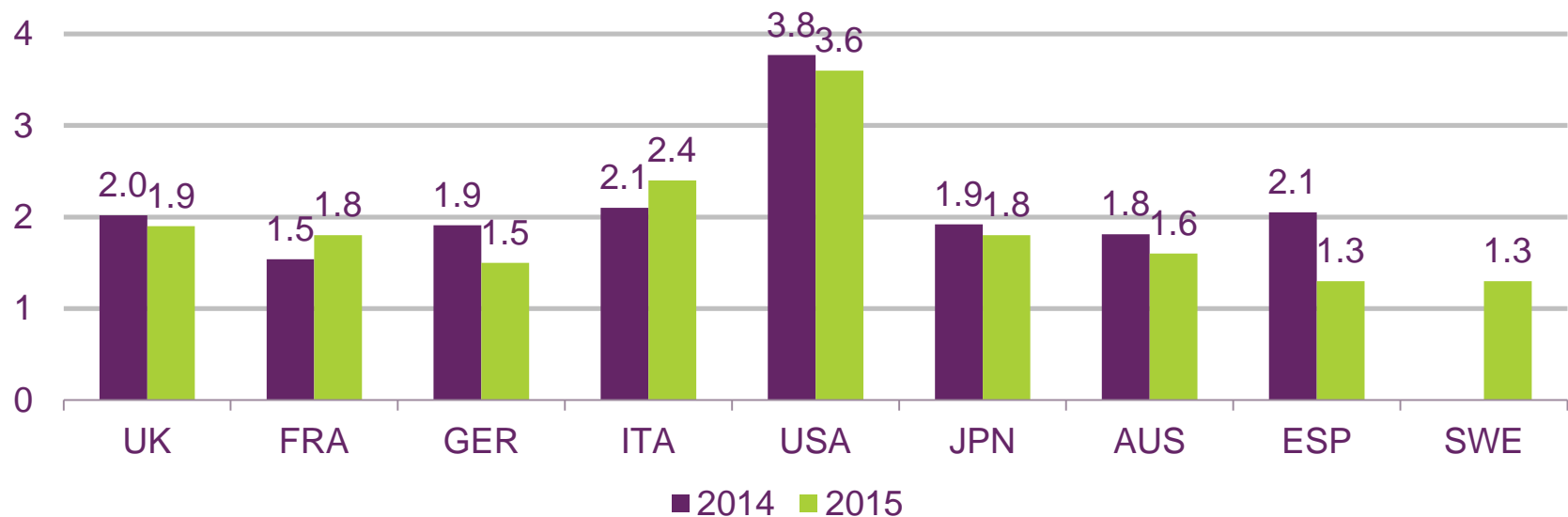


Source: Ofcom consumer research September - October 2015 Base: All weekly online shoppers who have received any items of post in the last week/non-weekly online shoppers who have received any items of post in the last week, UK=361/525, FRA=111/768, GER=257/616, ITA=187/523, USA=256/497, JPN=153/638, AUS=220/593, ESP=115/616, SWE=120/655 Q.16 Which of these types of items would you say you have personally received through the post in the last week? - NET: Any parcels

Figure 7.5

Average number of parcels received in the past week

All respondents who have received any items of post in the last week

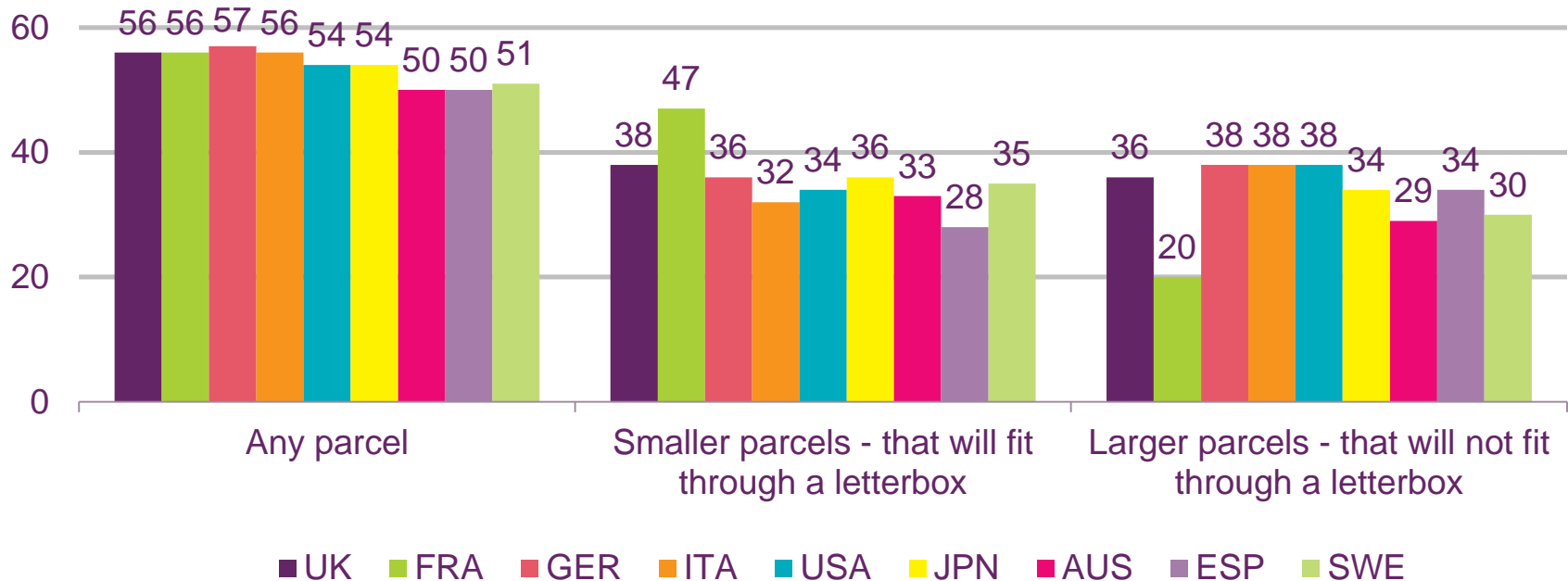


Source: Ofcom consumer research September - October 2015 Base: All respondents who have received any items of post in the last week, UK=888/886, FRA=896/879, GER=883/873, ITA=767/710, USA=739/753, JPN=838/791, AUS=865/813, ESP=700/731, SWE=775 Q.15 Approximately how many of these items you received in the last week were parcels i.e. items that wouldn't easily fit through a standard household letterbox?

Figure 7.6

Types of parcel received in the past week

All respondents who have received any parcel in the last week (%)

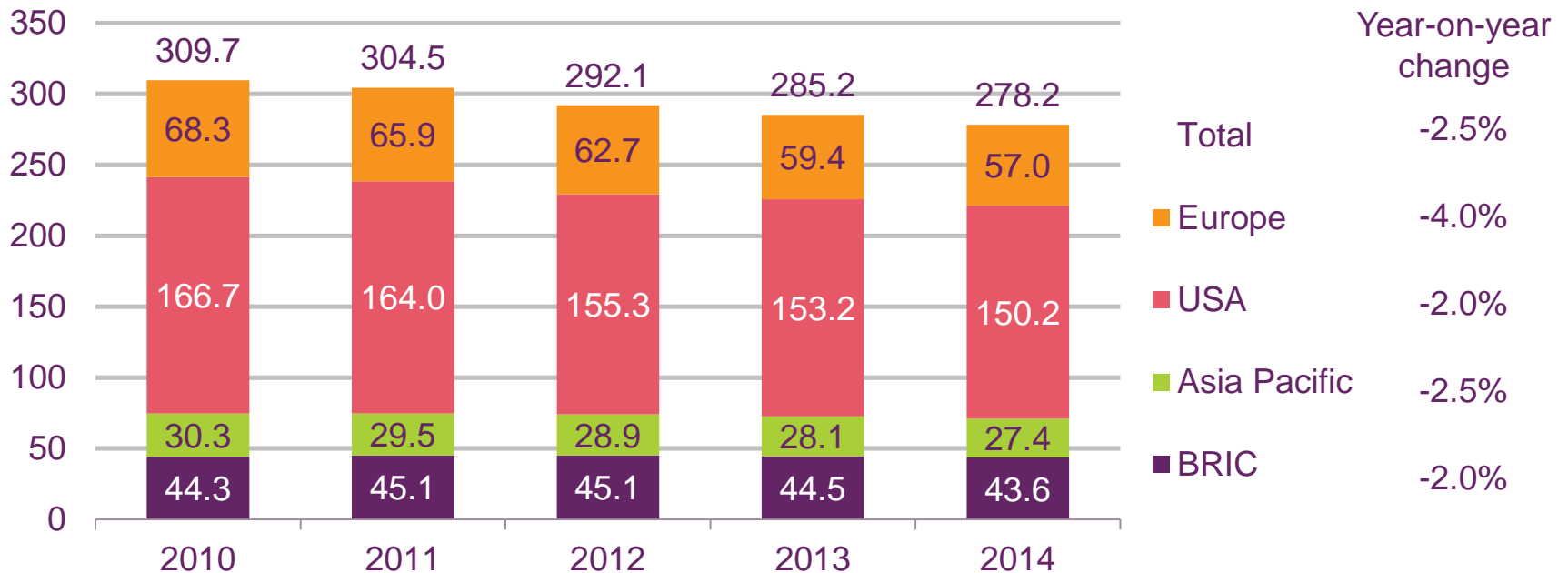


Source: Ofcom consumer research September - October 2015 Base: All respondents who have received any items of post in the last week, UK=886, FRA=879, GER=873, ITA=710, USA=753, JPN=791, AUS=813, ESP=731, SWE=775 Q.16 Which of these types of items would you say you have personally received through the post in the last week?

Figure 7.7

Total letter mail volumes in our comparator countries: 2010-2014

Billion items

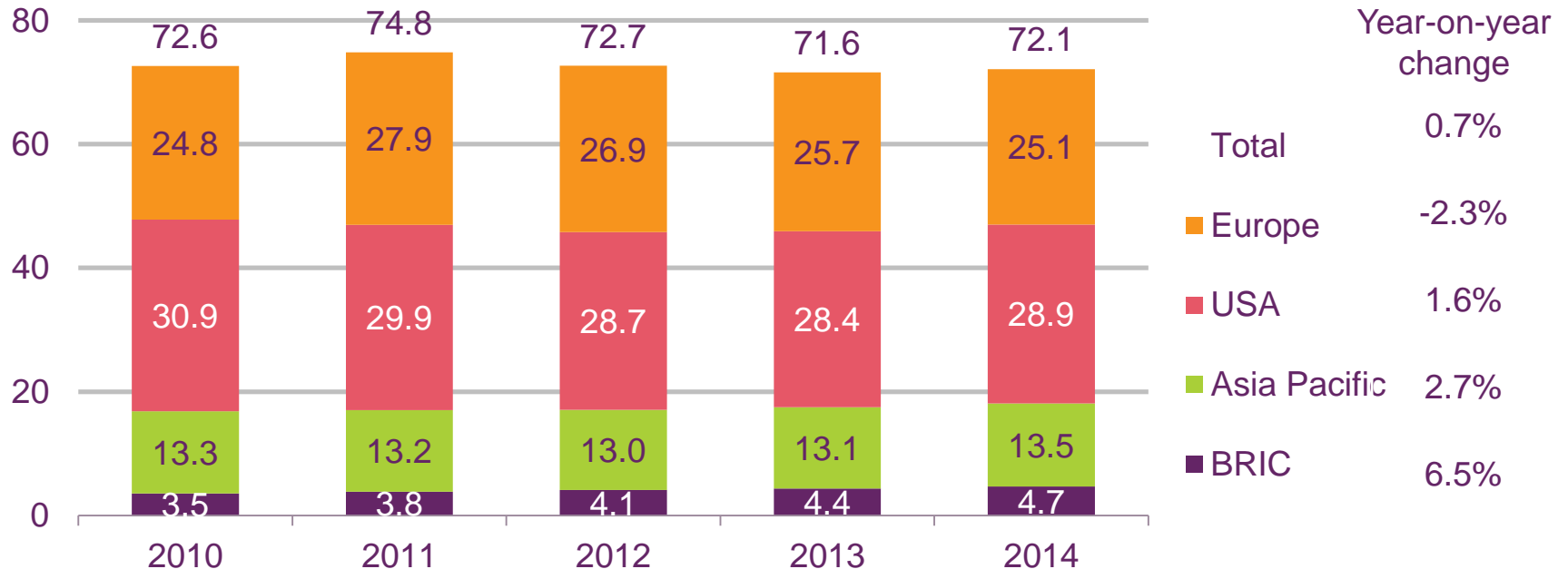


Source: WIK / Ofcom analysis

Figure 7.8

Total letter mail revenues in our comparator countries: 2010-2014

£ billion



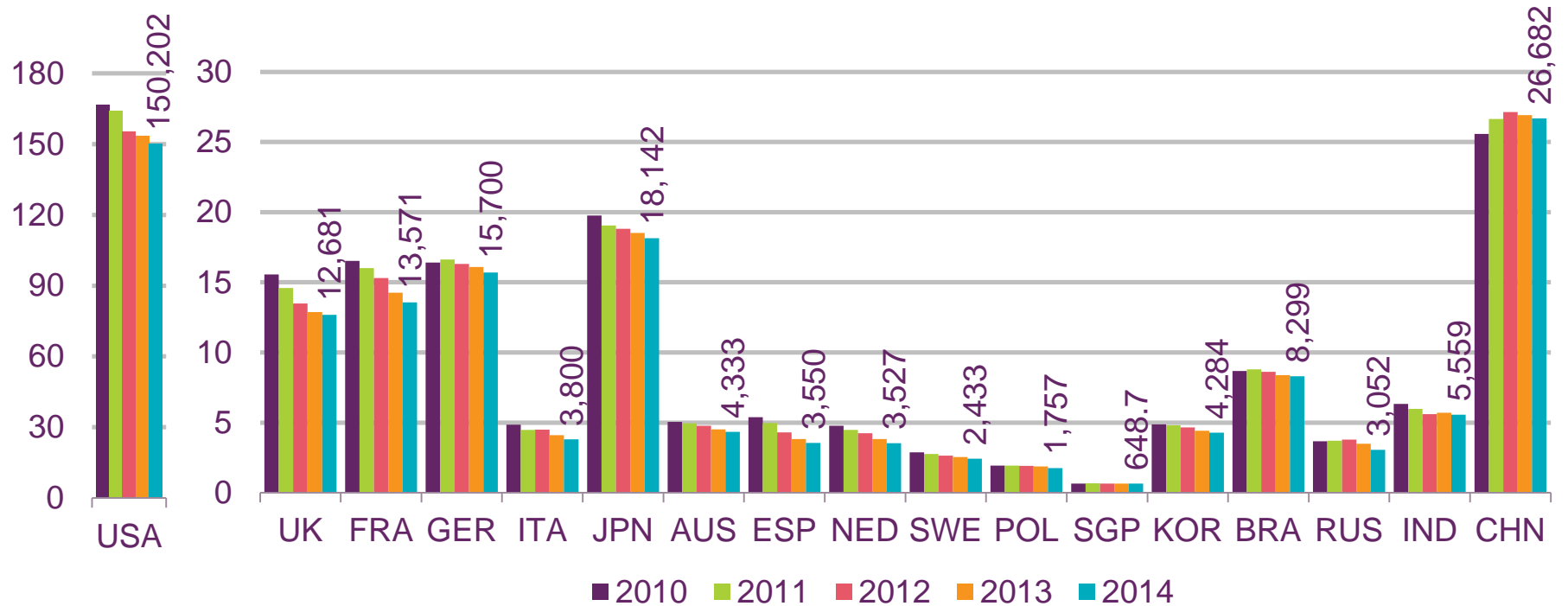
Source: WIK / Ofcom analysis

Note: Figures are nominal

Figure 7.9

Letter mail volumes: 2010-2014

Volume (million items)

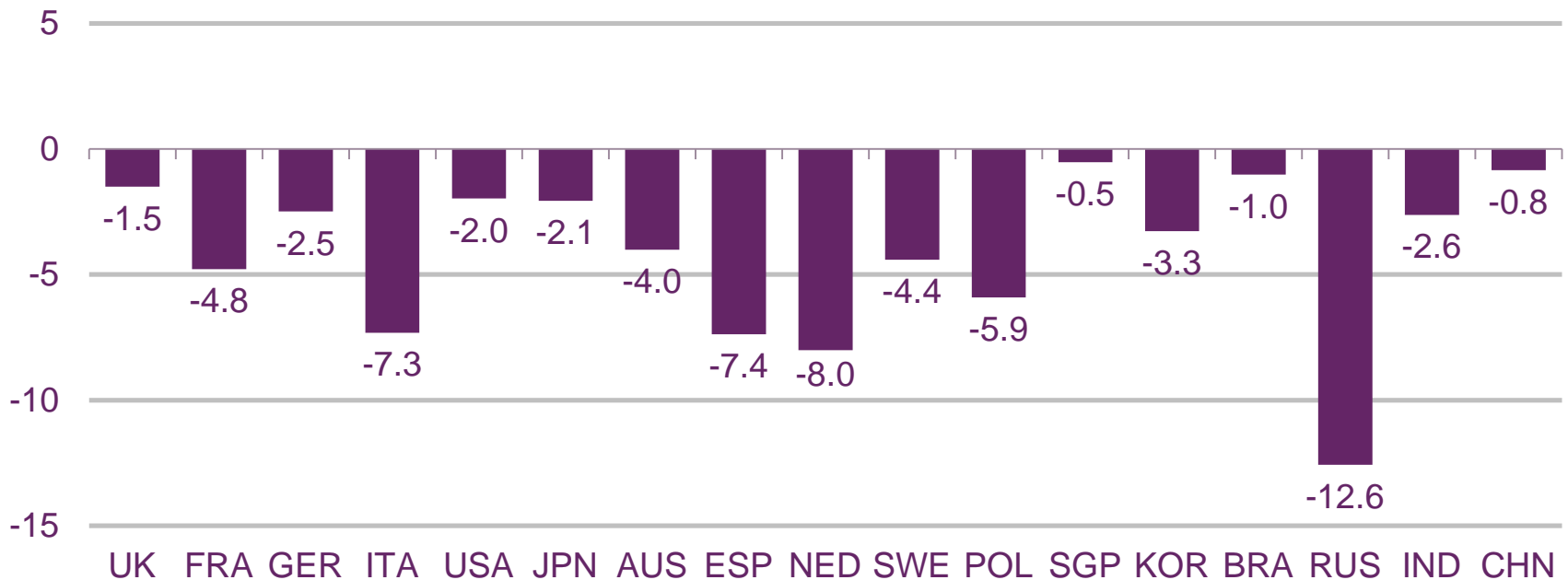


Source: WIK / Ofcom analysis

Figure 7.10

Proportional change in letter mail volume: 2013-2014

Change (%)

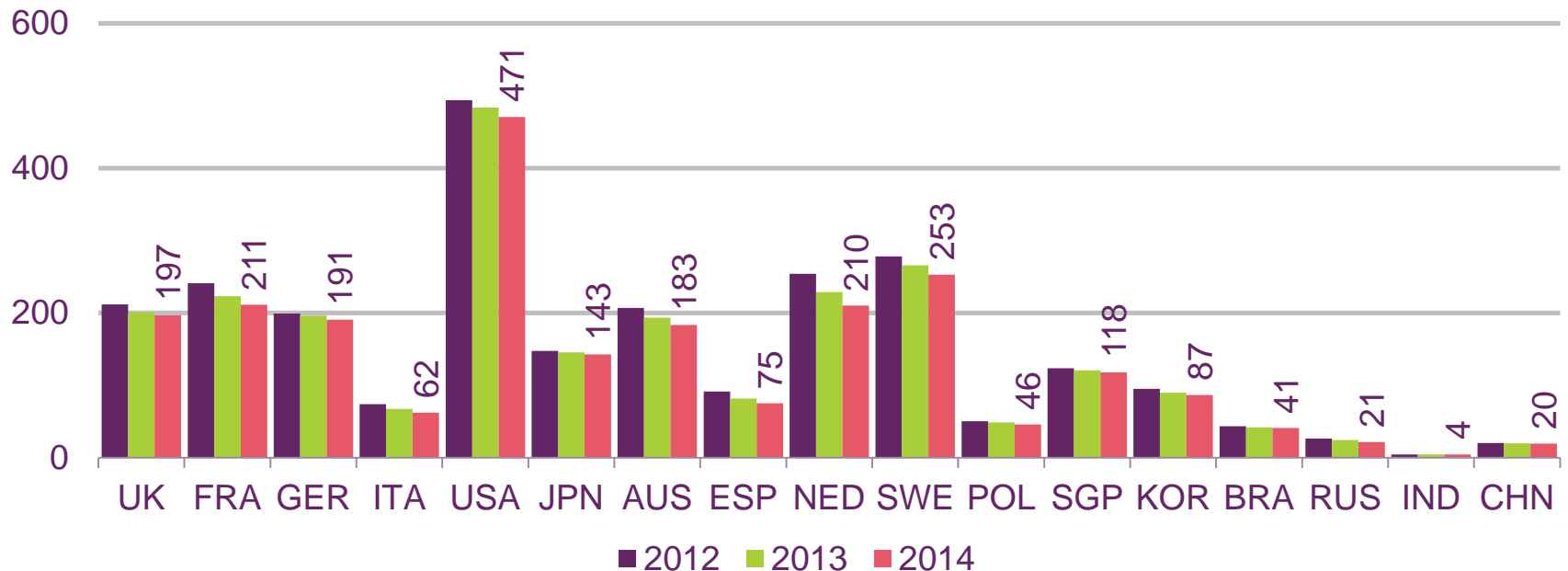


Source: WIK / Ofcom analysis

Figure 7.11

Letter mail volume per head of population: 2012-2014

Items per capita

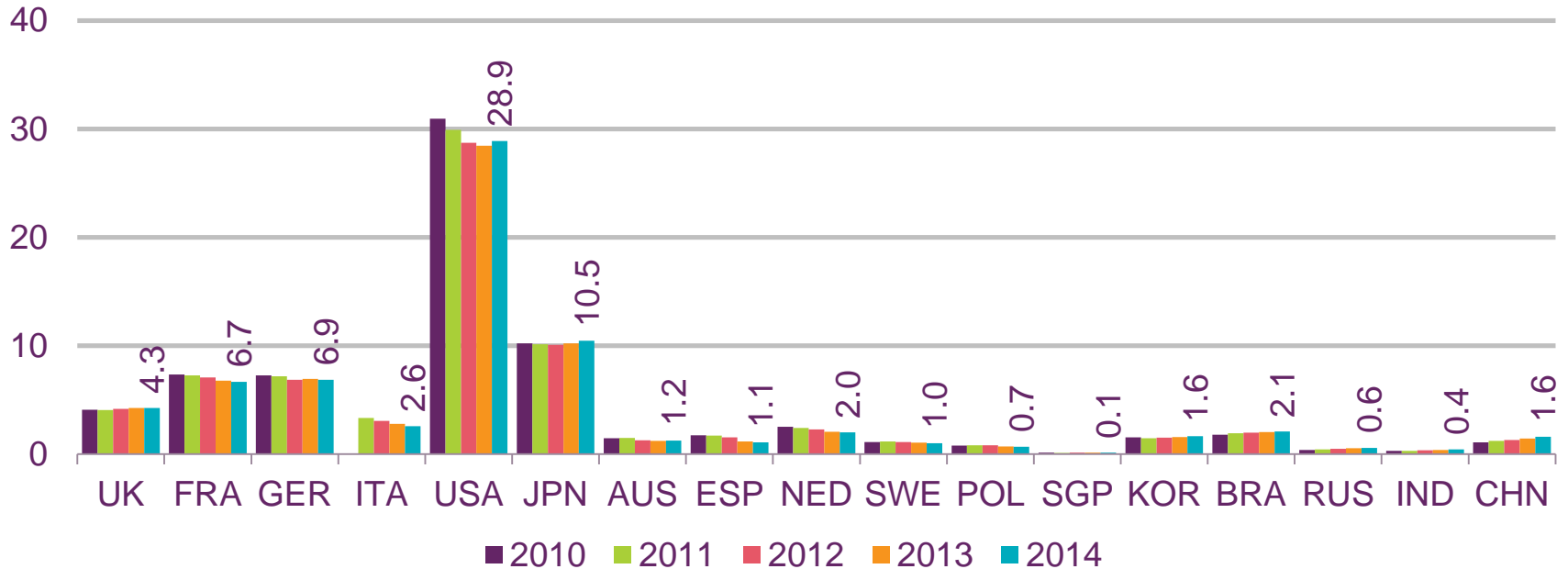


Source: WIK / Ofcom analysis

Figure 7.12

Letter mail revenues: 2010-2014

Revenue (£bn)

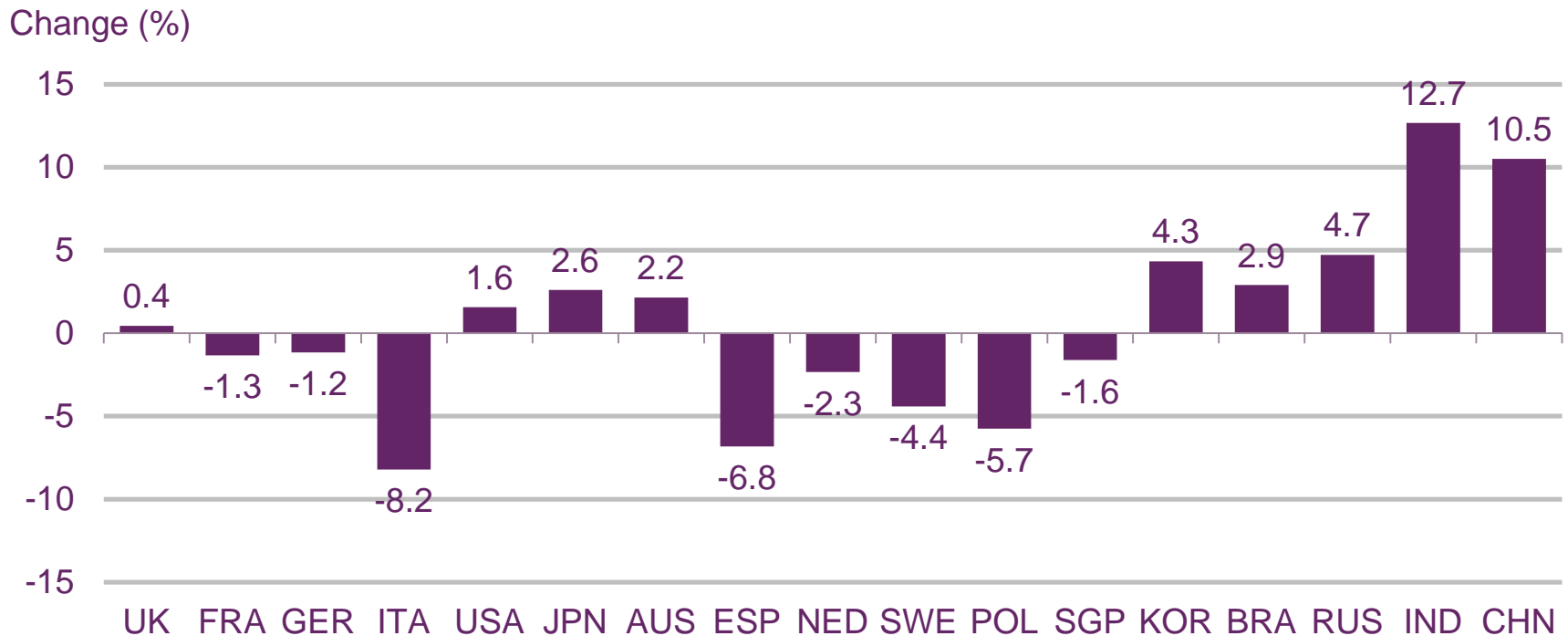


Source: WIK / Ofcom analysis

Note: Figures are nominal

Figure 7.13

Proportional change in letter mail revenue: 2013-2014



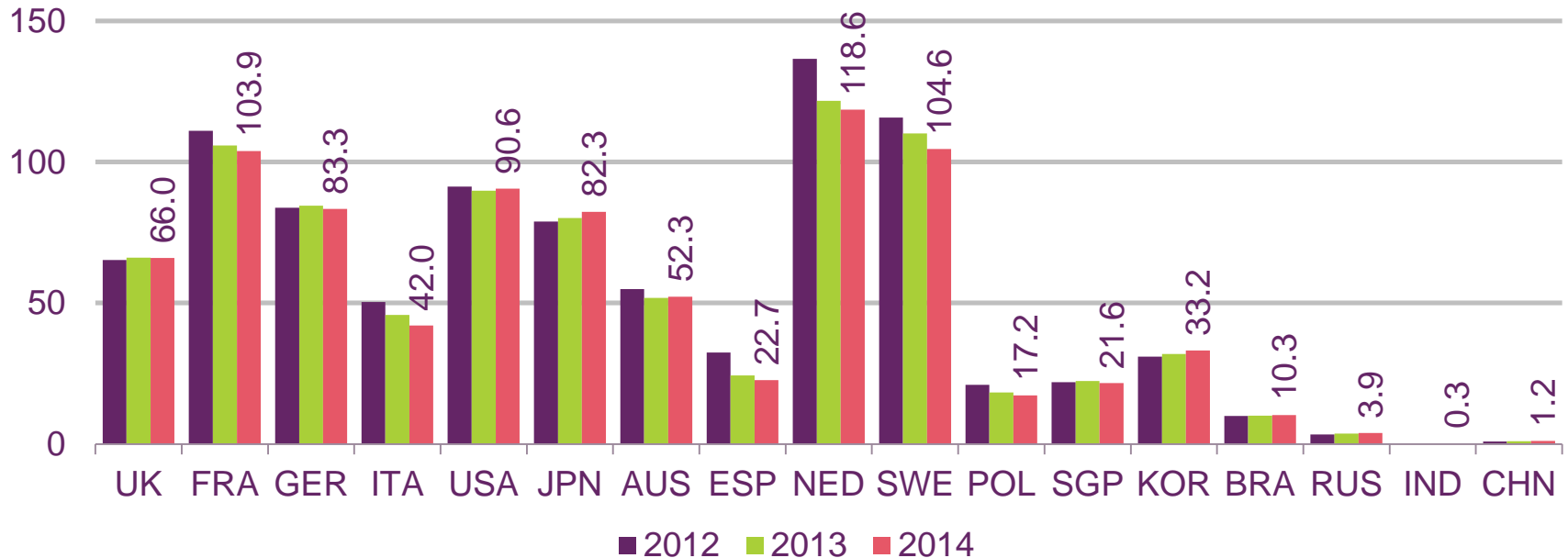
Source: WIK / Ofcom analysis

Note: Figures are nominal

Figure 7.14

Letter mail revenue per head of population: 2012-2014

Revenue per capita (£)



Source: WIK / Ofcom analysis

Note: Figures are nominal

Figure 7.15

Delivery specifications for the fastest letter mail product

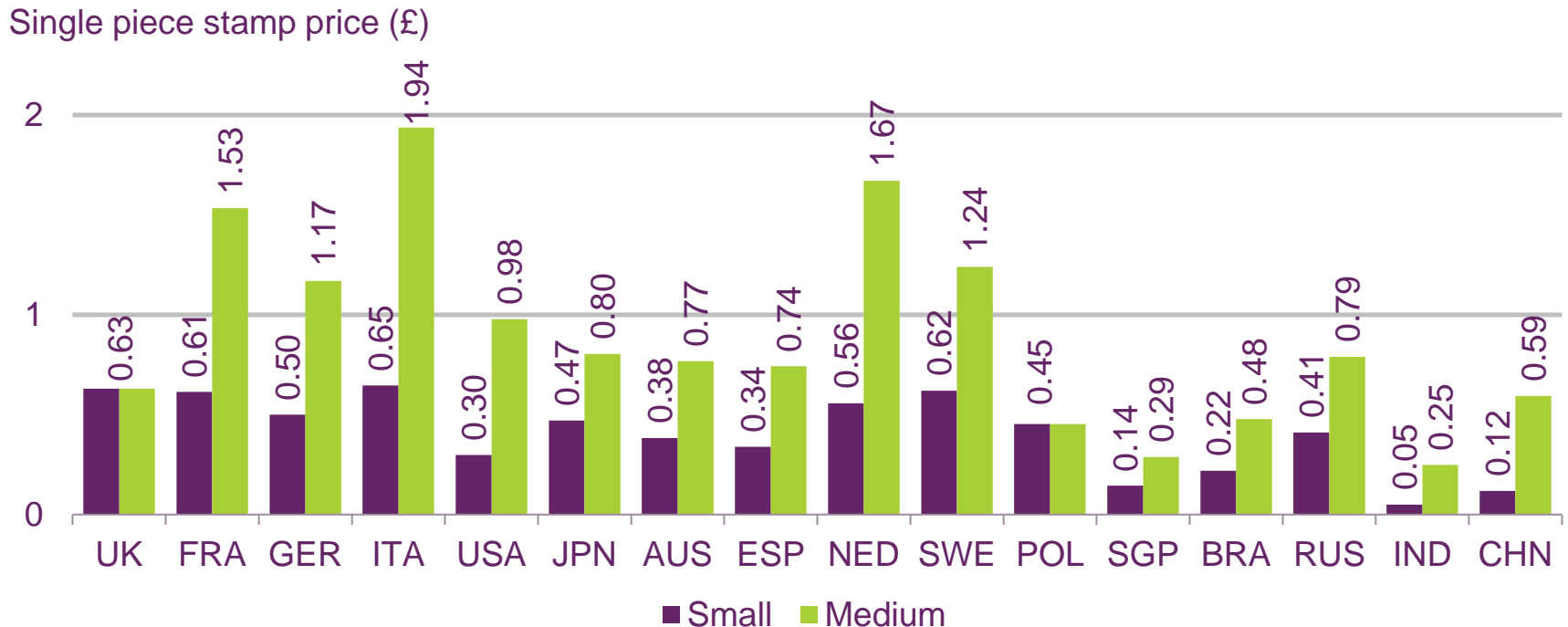
UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGA	BRA	RUS	IND	CHN
D+1	D+1	D+1	D+1	D+3	Variable	Variable	D+3	D+1	D+1	D+1	D+1	D+2-5	Variable	Variable	Variable

Source: WIK

Note: Delivery targets in Japan, Australia, Brazil, Russia, India and China are dependent on the point of origin and destination.

Figure 7.16

Published stamp prices for small (DL) and medium (C5) domestic letters



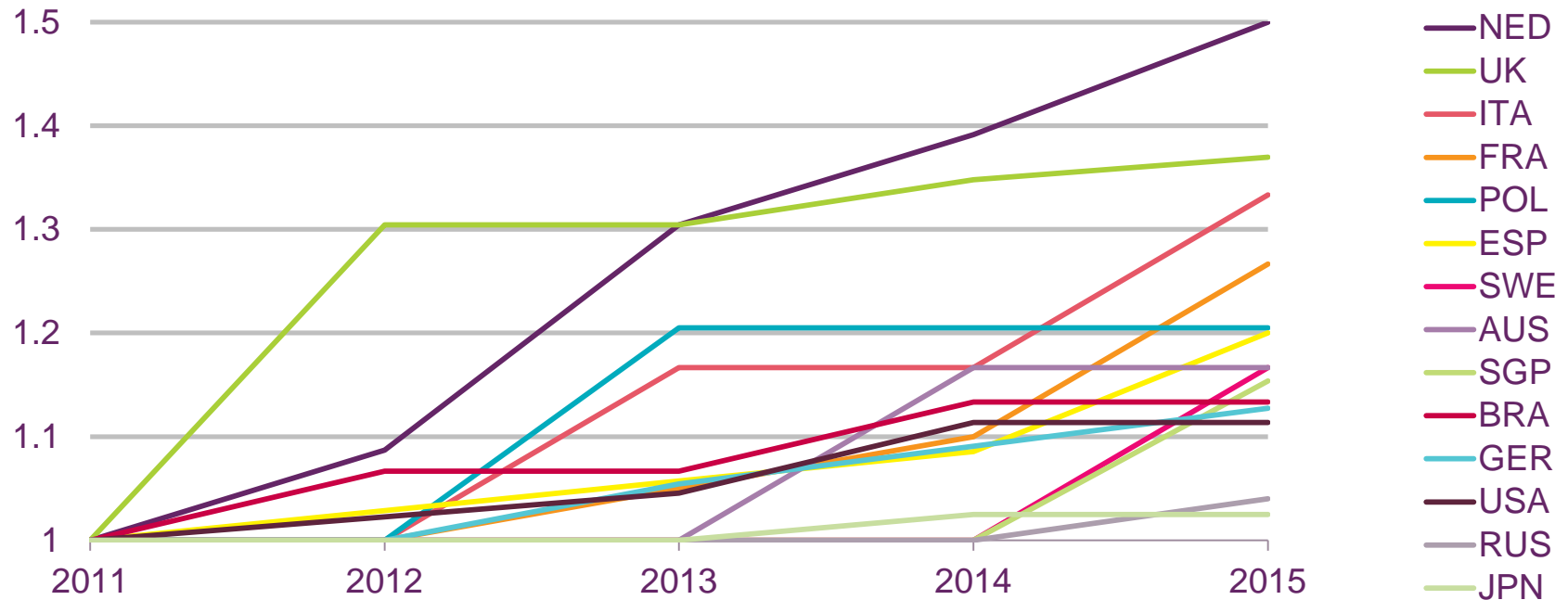
Source: WIK / Ofcom analysis

Note: South Korea is not included as the additional charge for the 'Priority Mail' product is not published.

Figure 7.17

Nominal increase in stamp price for the fastest available small (DL) letter since 2011

2011=1



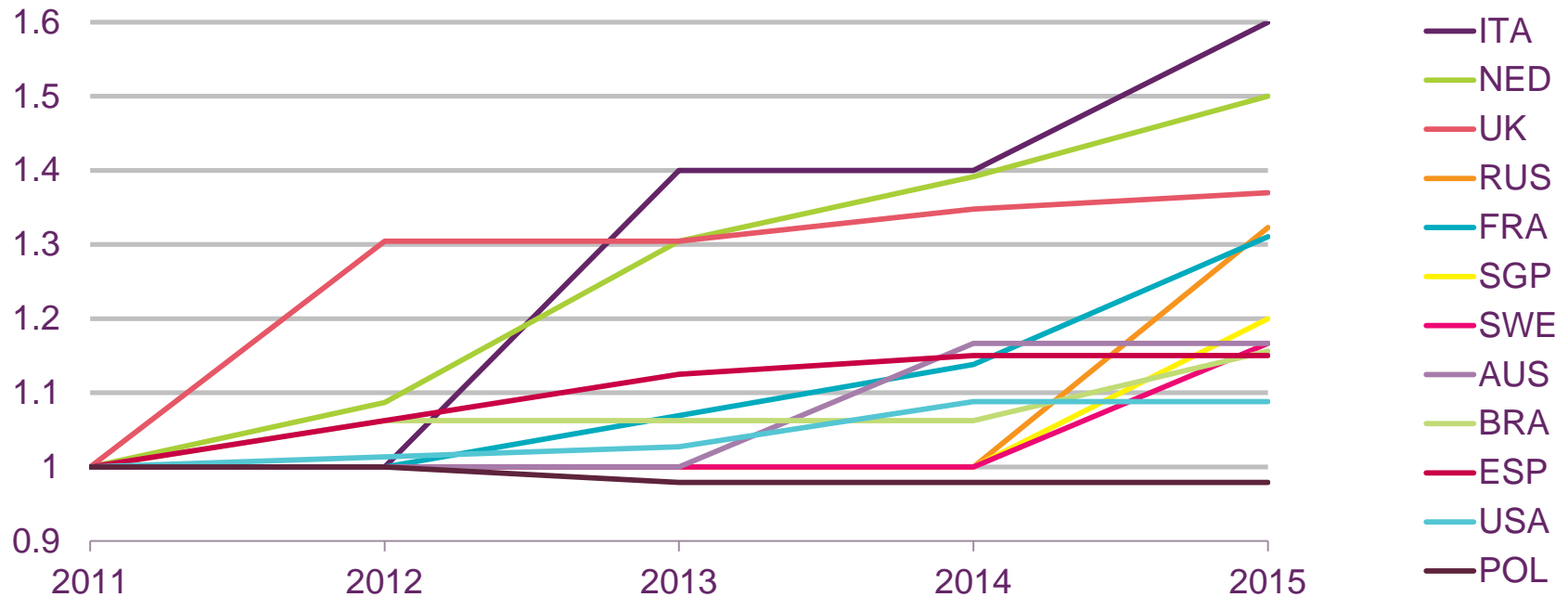
Source: WIK / Ofcom analysis

Note: Figures are nominal

Figure 7.18

Nominal increase in stamp price for the fastest available medium-sized (C5) letter since 2011

2011=1



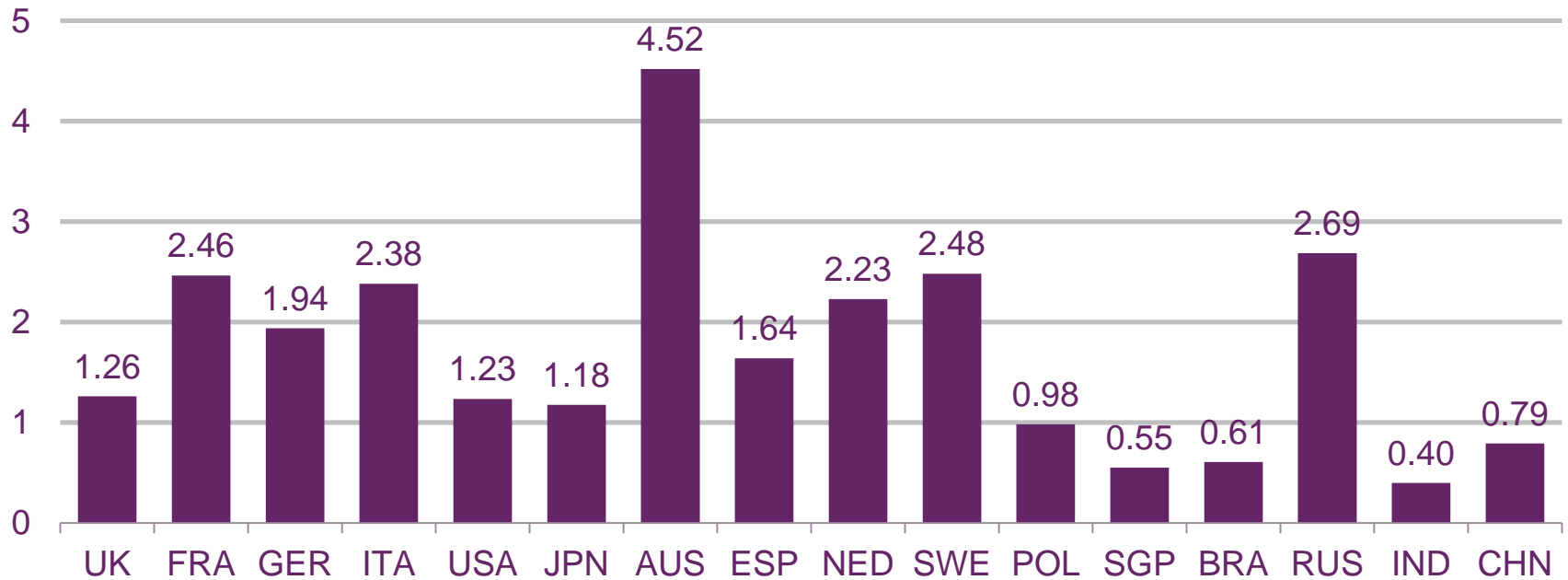
Source: WIK / Ofcom analysis

Note: Figures are nominal

Figure 7.19

Published stamp prices for large (C4) domestic letters: October 2015

Single piece stamp price (£)



Source: WIK / Ofcom analysis

Note: South Korea is not included as the additional charge for the 'Priority Mail' product is not published.

Figure 7.20

Delivery specifications for the Second Class equivalent letter product

UK	FRA	SWE	POL	KOR	RUS
D+3	D+3-4	D+3	D+3	D+3	Variable

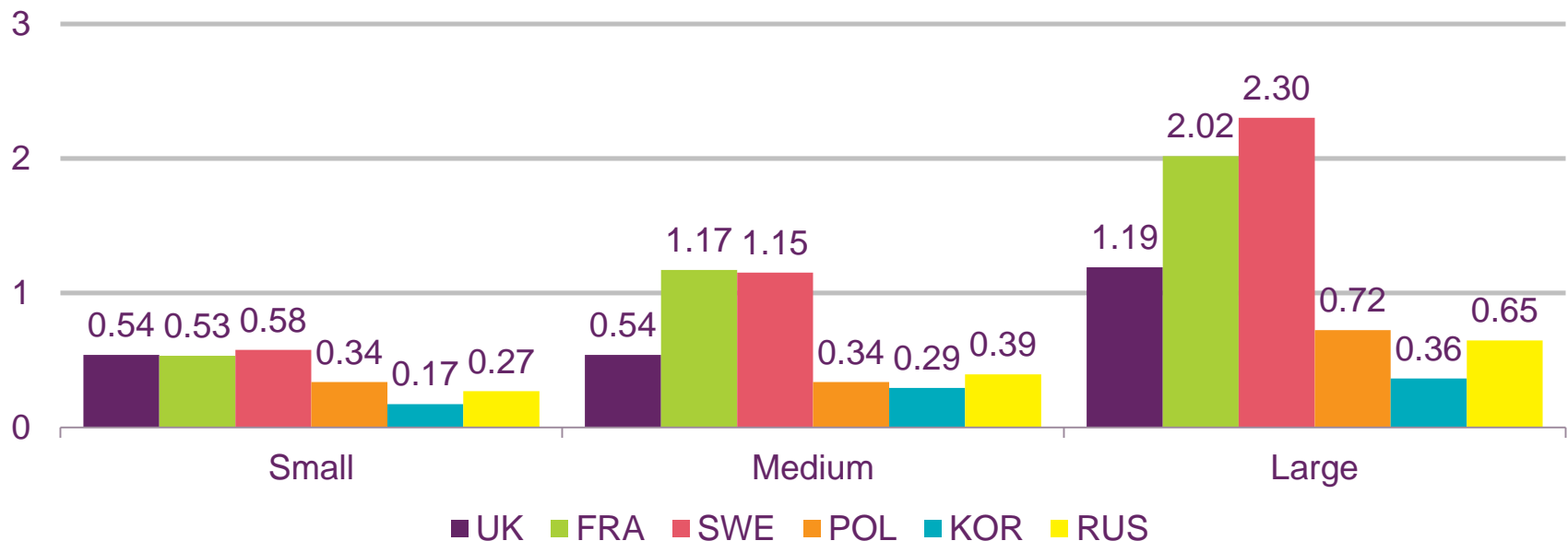
Source: WIK

Note: Delivery targets in Russia are dependent on the point of origin and destination.

Figure 7.21

Published stamp prices for Second Class small (DL), medium (C5) and large (C4) domestic letters: October 2015

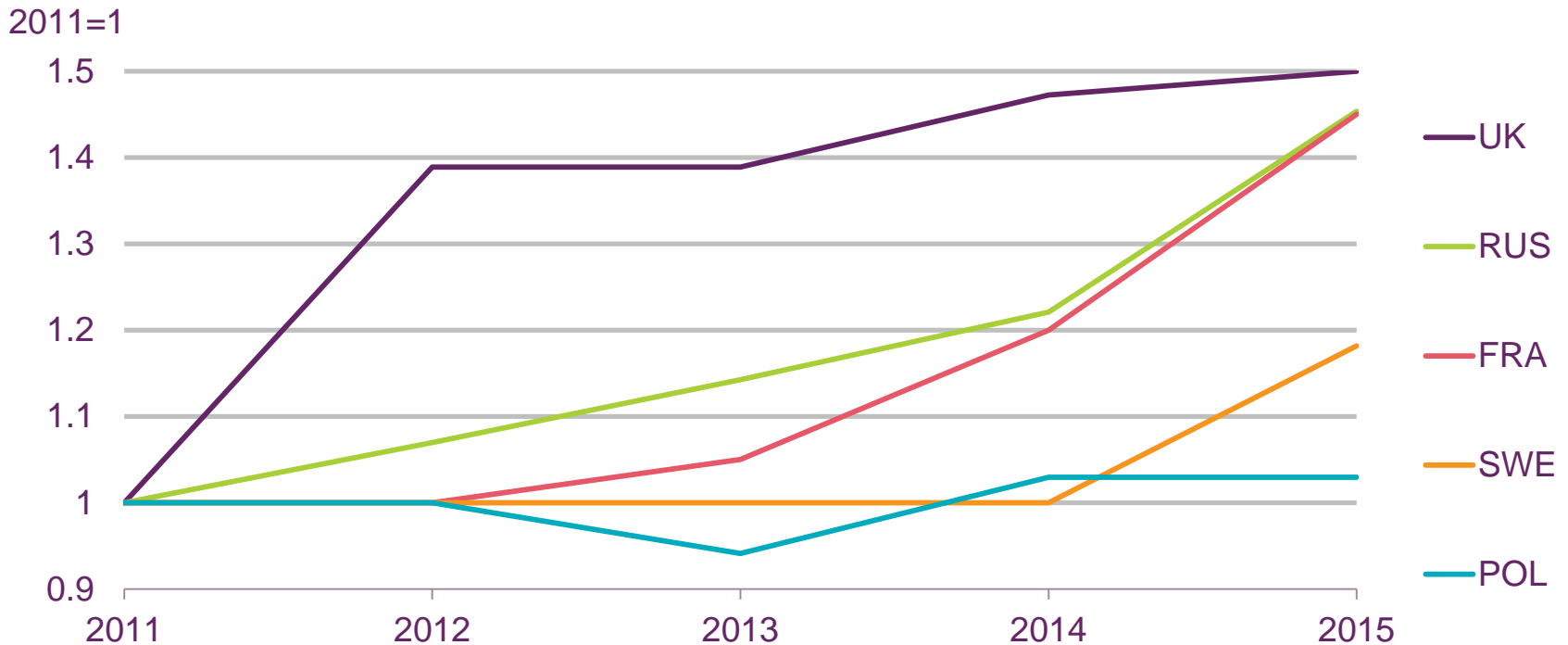
Single piece stamp price (£)



Source: WIK / Ofcom analysis

Figure 7.22

Nominal increase in stamp price for Second Class equivalent medium-sized (C5) letter since 2010

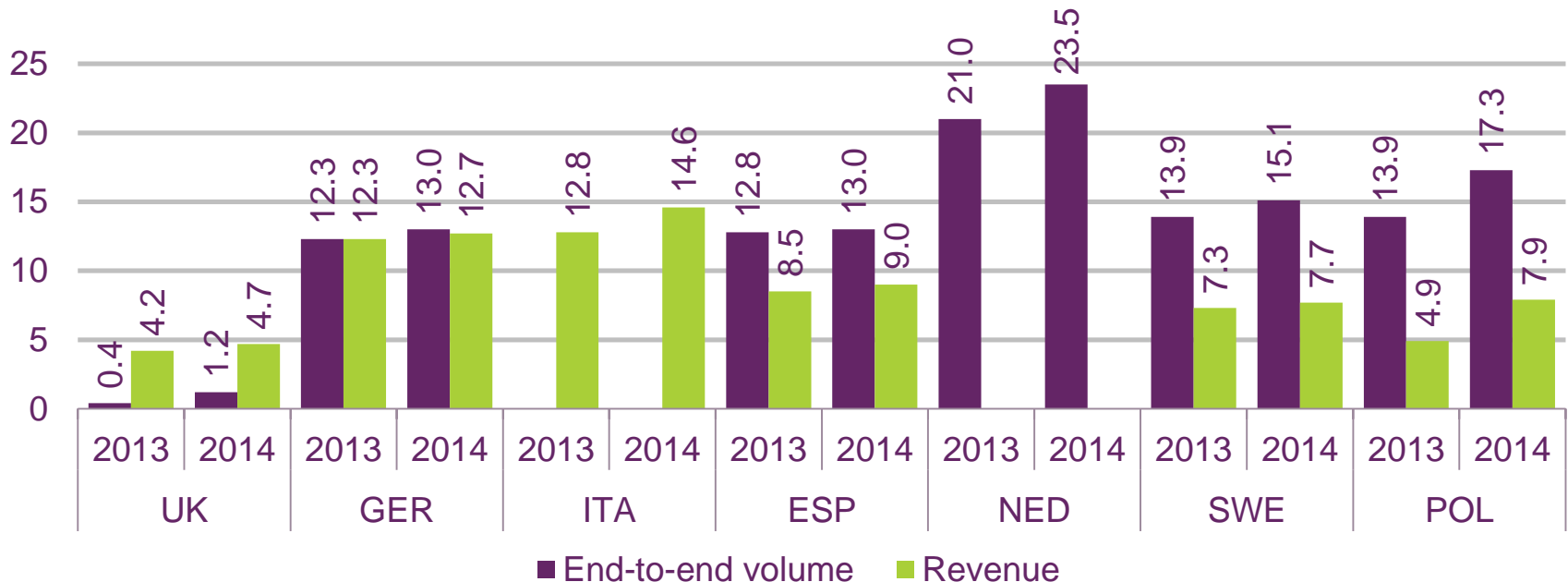


Source: WIK / Ofcom analysis

Figure 7.23

Revenue and end-to-end delivered letter shares accounted for by operators other than the universal postal service provider: 2013-2014

Share (%)



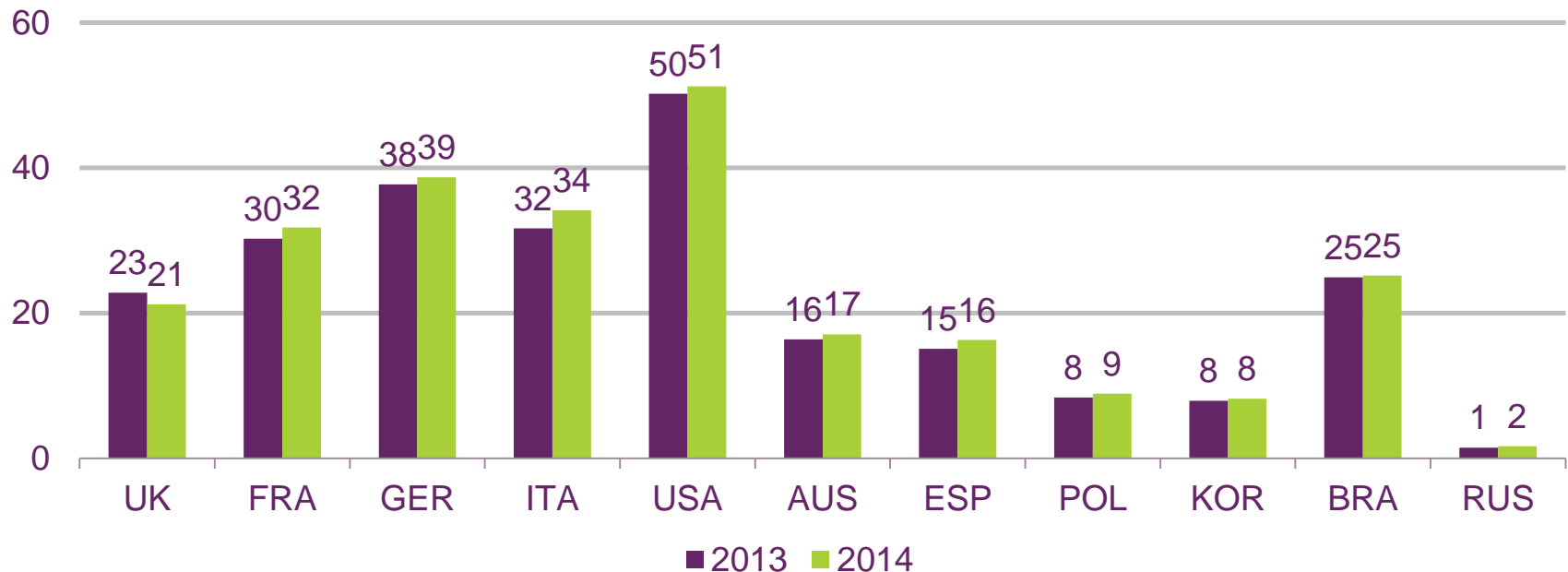
Source: WIK / Ofcom analysis

Note: 2014 shares for Spain are approximate. Data are not available for volumes in Italy and revenue in the Netherlands

Figure 7.24

Proportion of direct mail in total letter volume: 2013-2014

Proportion of direct mail in total letter volume (%)

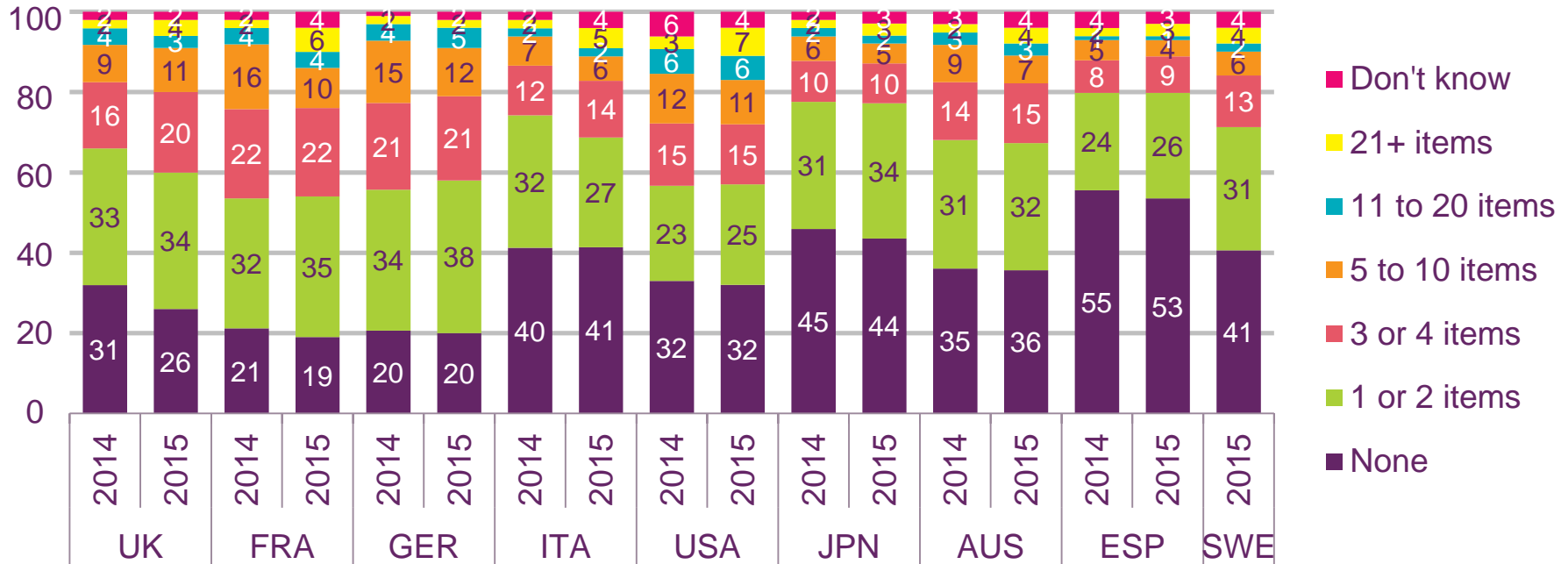


Source: WIK / Ofcom analysis

Figure 7.25

Approximate number of items of post sent per month

Respondents (%)

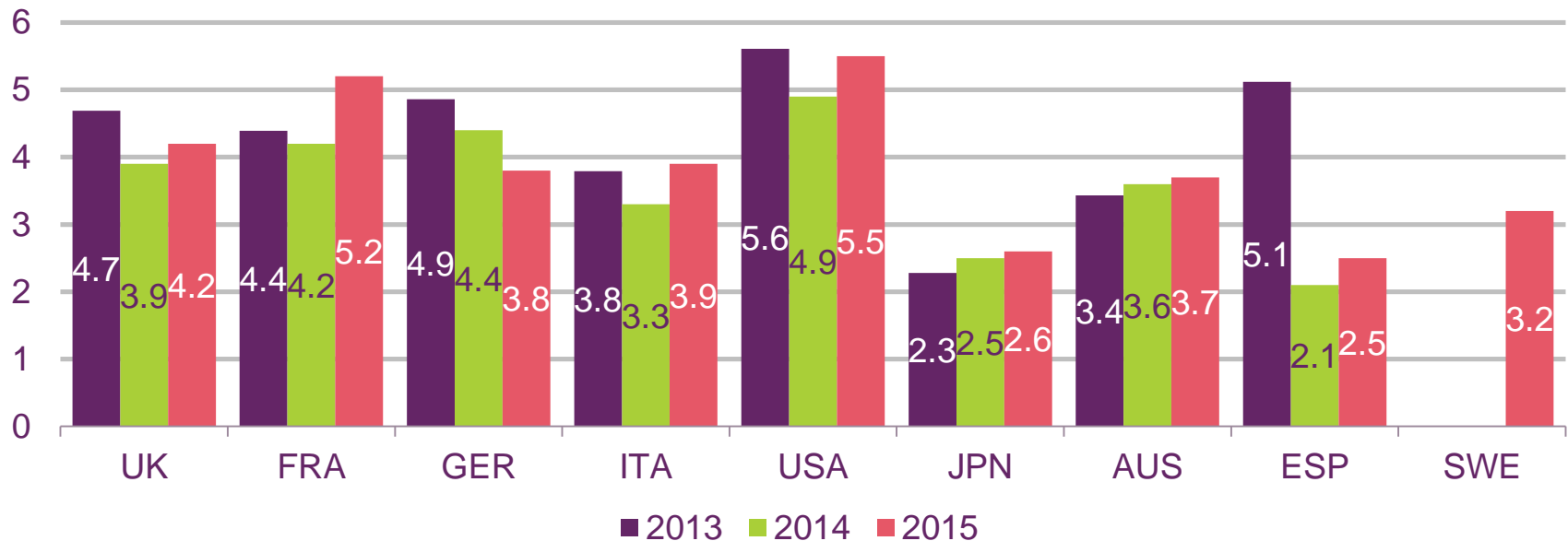


Source: Ofcom consumer research September - October 2015 Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004 Q.12 Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Figure 7.26

Average number of items sent per month

Average number of items



Source: Ofcom consumer research September - October 2015, October 2014, September 2013

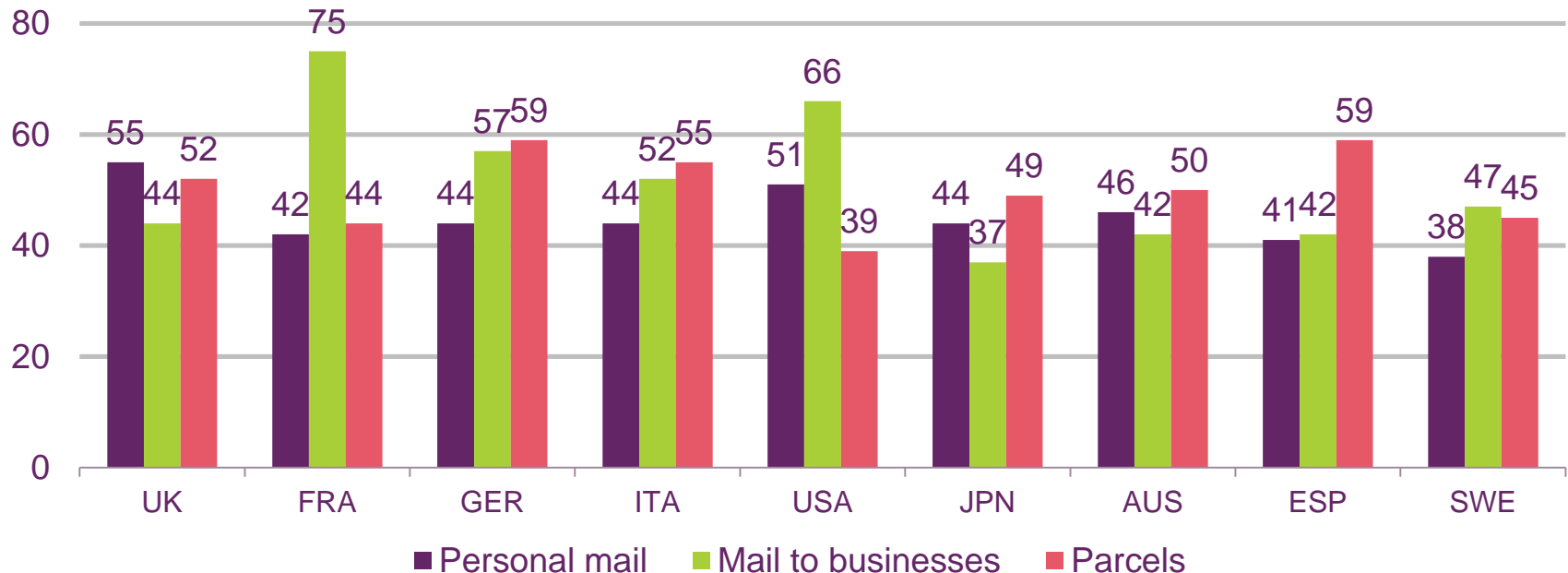
Base: All respondents, UK=1000/1011/1006, FRA=1007/1027/1003, GER=1010/1006/1007, ITA=1010/1006/1003, USA=1004/1000/1009, JPN=1005/1003/1006, AUS=1007/1000/1000, ESP=1020/1002/1002, SWE=1004 Q.12

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

Figure 7.27

Categories of post sent in the past month

Respondents who have sent items of post in the past month (%)



Source: Ofcom consumer research September - October 2015

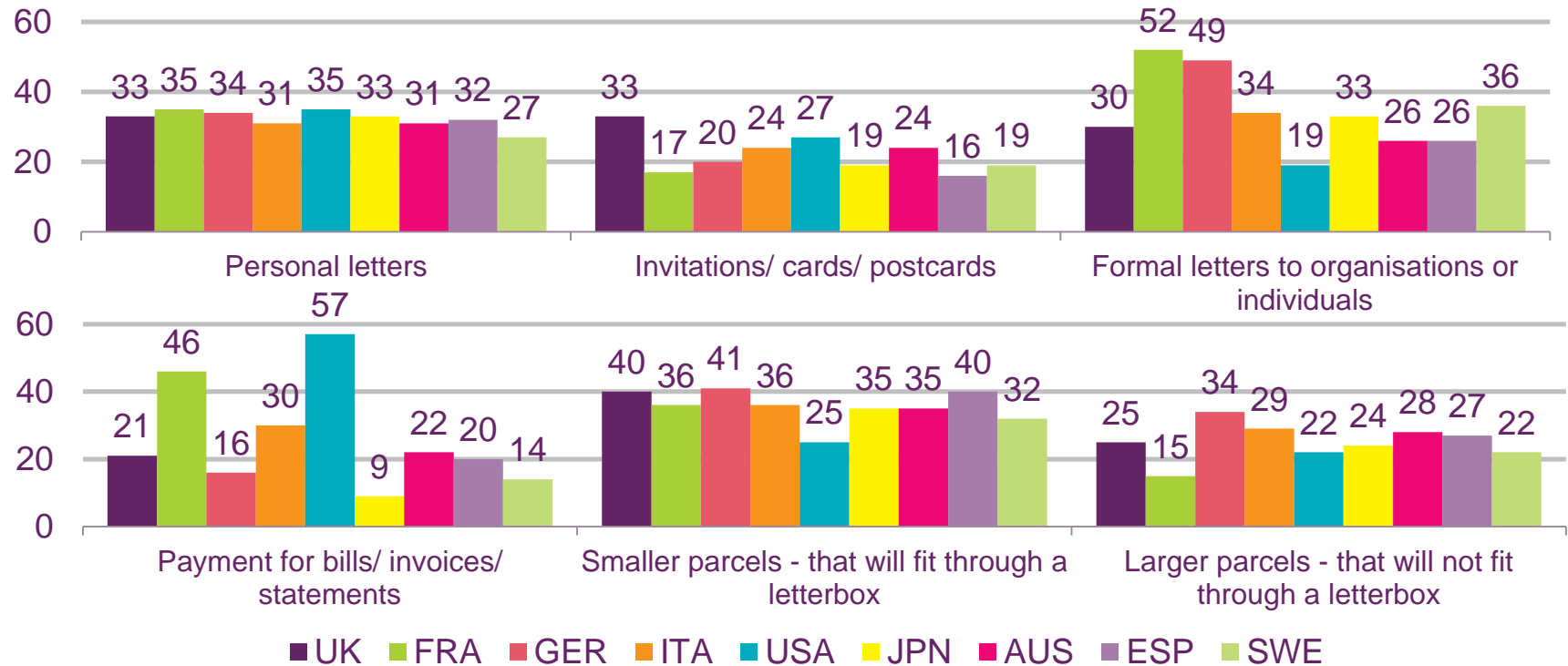
Base: All respondents who have sent any items of post in the last month, UK=731, FRA=772, GER=790, ITA=549, USA=643, JPN=533, AUS=601, ESP=435, SWE=547

Q.13 Which of these types of mail would you say you have personally sent in the last month by post?

Figure 7.28

Type of items sent in the past month

Respondents who have sent items of post in the past month (%)



Source: Ofcom consumer research September - October 2015

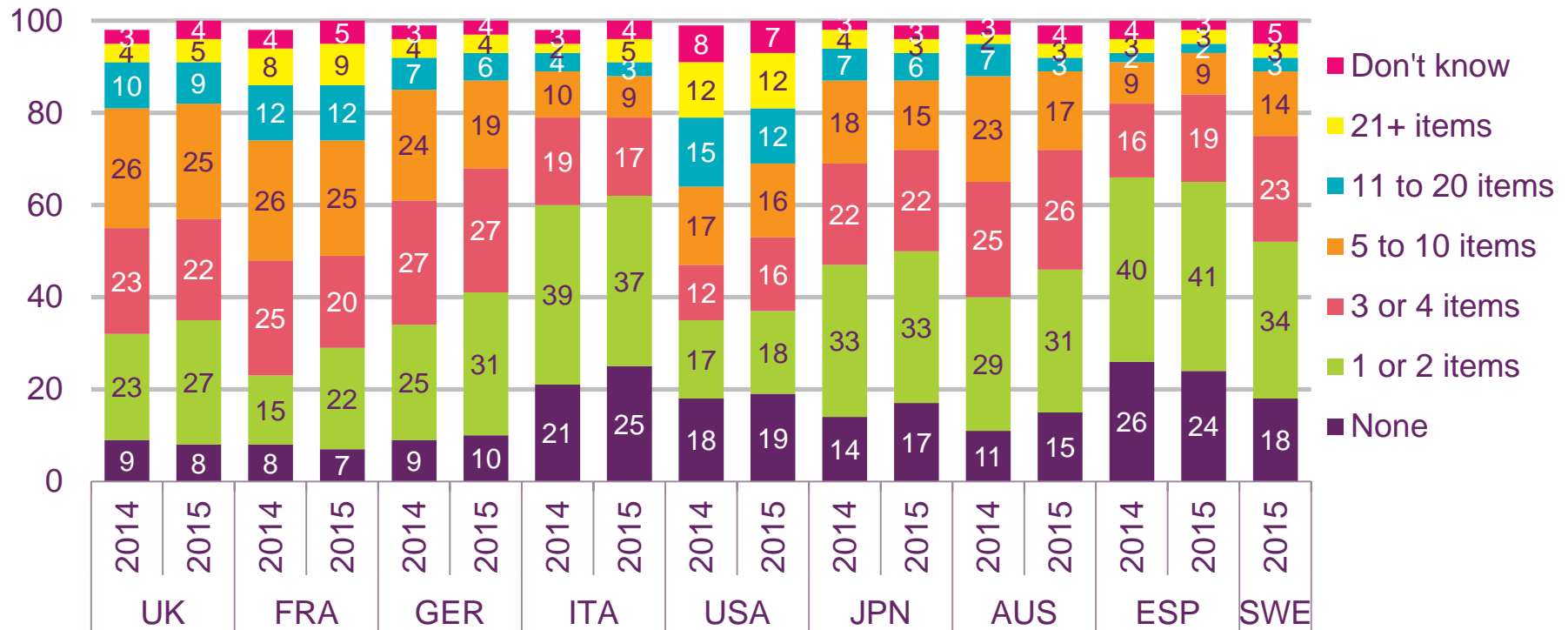
Base: All respondents who have sent any items of post in the last month, UK=731, FRA=772, GER=790, ITA=549, USA=643, JPN=533, AUS=601, ESP=435, SWE=547

Q.13 Which of these types of mail would you say you have personally sent in the last month by post?

Figure 7.29

Approximate number of items of post received in the past week

Respondents (%)



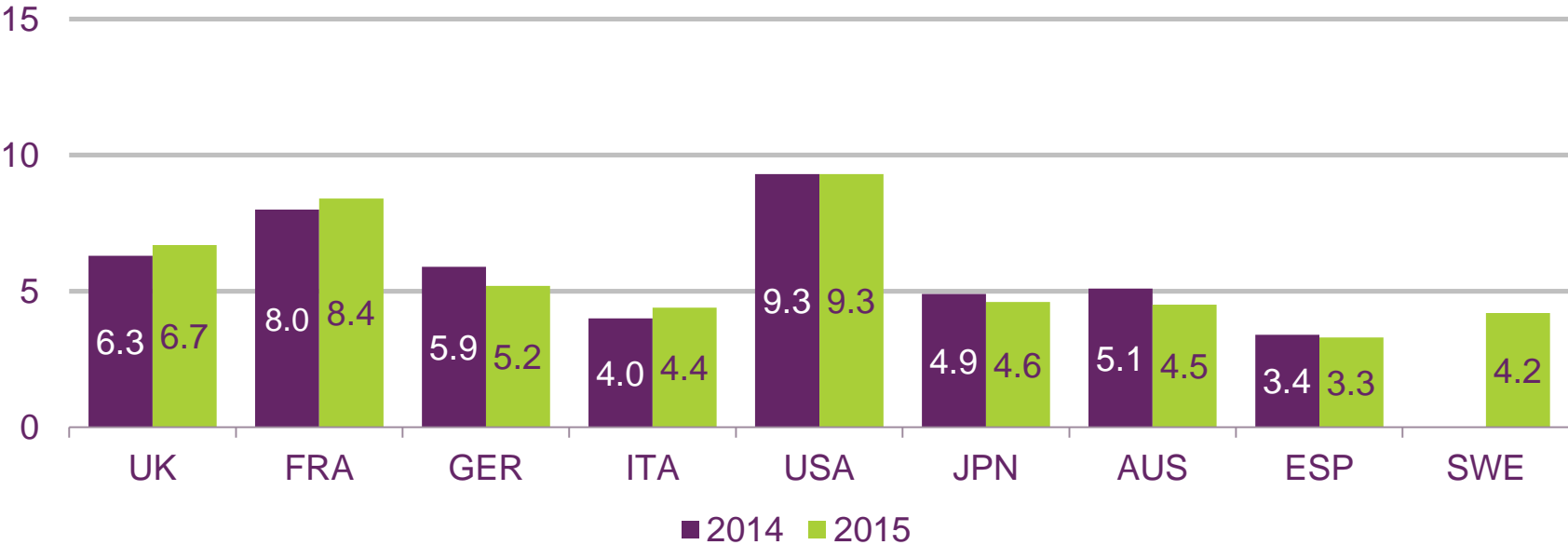
Source: Ofcom consumer research September - October 2015

Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004 Q.14 Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week?

Figure 7.30

Number of items received in the past week

Average number of items

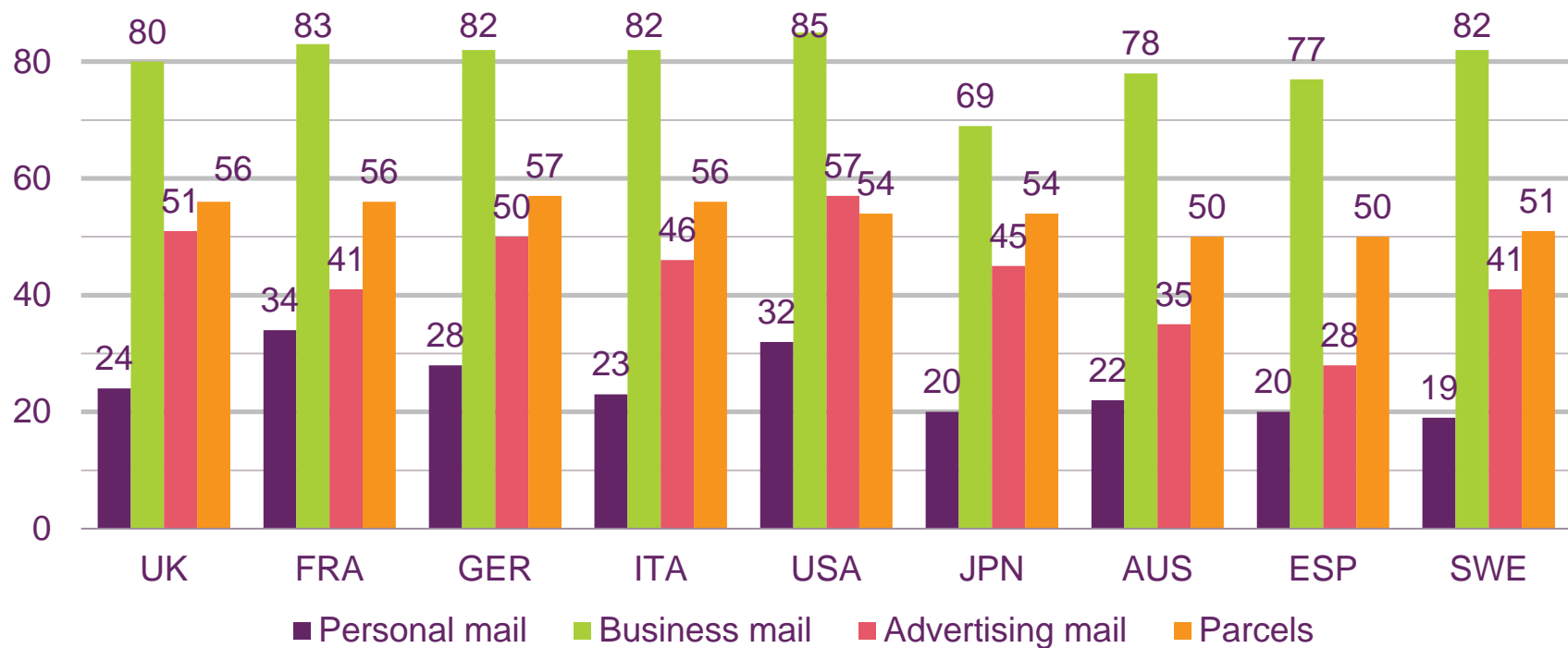


Source: Ofcom consumer research September - October 2015, October 2014, September 2013
 Base: All respondents, UK=1000/1011/1006, FRA=1007/1027/1003, GER=1010/1006/1007, ITA=1010/1006/1003, USA=1004/1000/1009, JPN=1005/1003/1006, AUS=1007/1000/1000, ESP=1020/1002/1002, SWE=1004
 Q.14 Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week

Figure 7.31

Categories of items received in the past week

Respondents who have received any item of post in the past week (%)



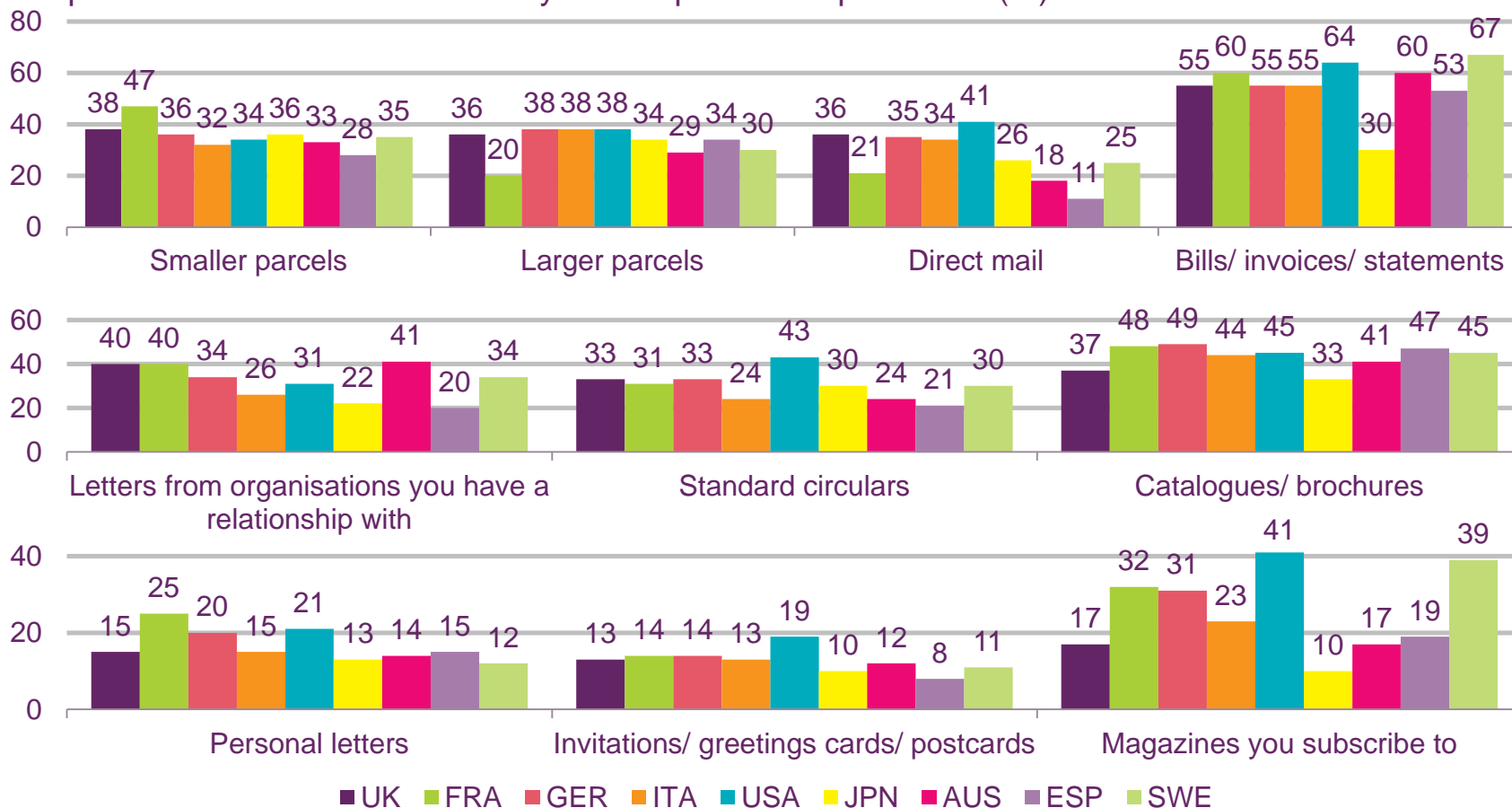
Source: Ofcom consumer research September - October 2015 Base: All respondents who received at least one item of post in the last week, UK=886, FRA=879, GER=873, ITA=710, USA=753, JPN=791, AUS=813, ESP=731, SWE=775 Q.16 Which of these types of items would you say you have personally RECEIVED through the post in the last WEEK? Please think about items that are addressed to you personally rather than items like leaflets or anything else that may come through your letterbox.

Figure 7.32

Types of mail received in the past week



Respondents who have received any item of post in the past week (%)

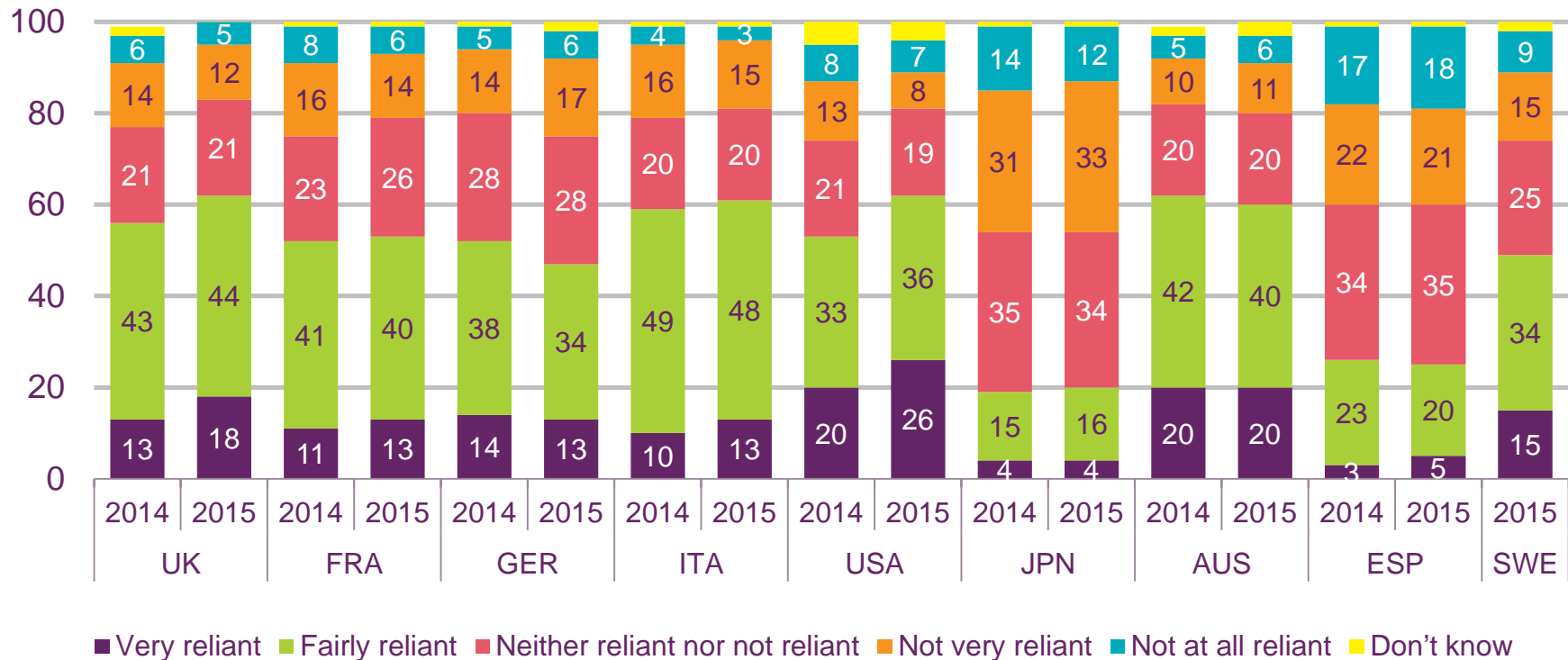


Source: Ofcom consumer research September - October 2015 Base: All respondents who had received any item of post in the past week, UK=886, FRA=879, GER=873, ITA=710, USA=753, JPN=791, AUS=813, ESP=731, SWE=775Q.16 Which of these types of items would you say you have personally received through the post in the last week?

Figure 7.33

Reliance on post as a way of communicating

Respondents (%)



Source: Ofcom consumer research October 2015, October 2014 Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004 Q.17 How reliant would you say you are on post as a way of communicating?