

6 Post

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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 739 respondents took part in Northern Ireland. Due to changes to the methodology and questionnaire, the data collected in Scotland, Wales and Northern Ireland are not directly comparable to 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 244 respondents took part in Northern Ireland. Due to changes to the methodology and questionnaire, the data collected in Scotland, Wales and Northern Ireland are not directly comparable to previous years' data.

6.1 Recent developments

More post boxes for Northern Ireland

Around 280 new post boxes are to be installed across Northern Ireland as part of a Royal Mail initiative to boost public access.

The boxes will be mainly in rural areas, new housing developments and areas not currently served by a post box. Once complete, 98.35% of UK households will be within half a mile of a post box.¹ England will also get a further 280 boxes, Scotland 150 and Wales 46.

Parcel surcharging update

Ofcom published findings from research it carried out into the causes of parcel delivery surcharges in some geographic areas in November 2016.² We found that some parcel operators charge more to deliver parcels in Northern Ireland and the Highlands and Islands of Scotland, and that in general there was a higher cost of delivery in these areas (for example, due to lower delivery drop density and cost of transport across the Irish Sea).

In addition, the Consumer Council for Northern Ireland (CCNI) published a report in June 2015 which showed that only 50% of online retailers offered the same delivery price to Northern Ireland as the rest of the UK and that consumers ordering online in Northern Ireland faced more exclusion and less delivery and collection options than the rest of the UK.

Ofcom is undertaking further research to understand the extent to which the factors given as the causes of parcel surcharging justify the additional charges, and will report on this later in 2017.

¹Under its Designated Universal Service Provider (DUSP) conditions, Royal Mail must ensure that in the UK as a whole, the distribution of letter boxes is such that there is a letter box within half a mile of the premises of not less than 98% of users of postal services and for the remainder of the country provide sufficient access to the universal service to meet the reasonable needs of such users (having regard to the costs and operational practicalities of doing so).

²https://www.ofcom.org.uk/postal-services/monitoring_reports

6.2 Sending and receiving post: residential customers

Adults in Northern Ireland had sent an average of less than three invitations/ greetings cards/ postcards in the previous month

Adults in Northern Ireland were asked how many items of seven different types of post they had sent in the previous month.

On average, they had sent 2.7 invitations/ greetings cards/ postcards, 1.0 smaller parcels (that will fit through a letterbox) and 1.0

formal letters to organisations or individuals. For each of the other four types of post, they had sent on average less than one item.

Figure 6.1: Approximate number of postal items sent in the previous 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)

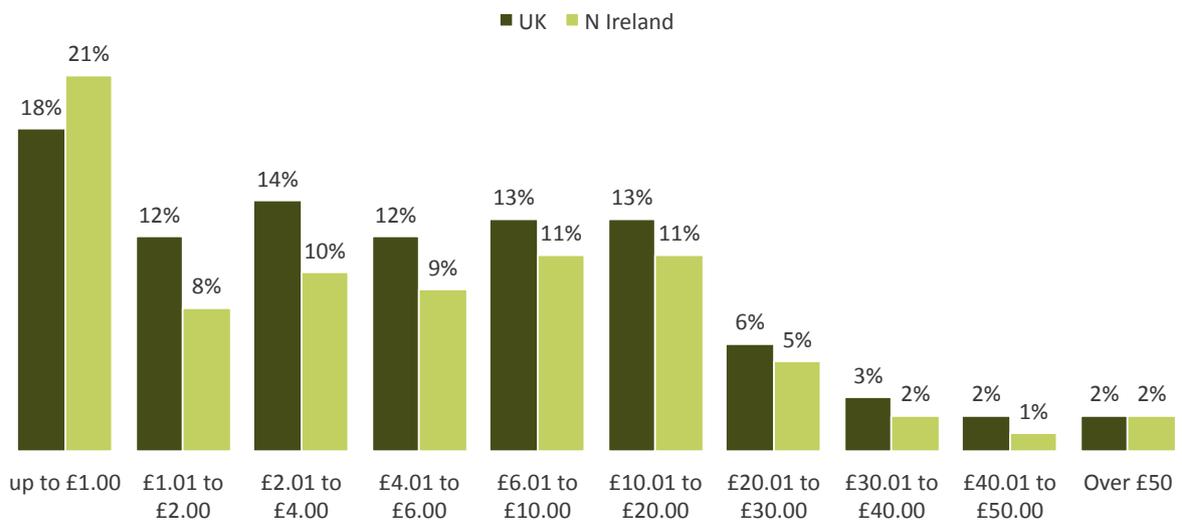
Seven in ten adults in Northern Ireland had spent less than £20 on postage in the previous month

Seven in ten adults in Northern Ireland (71%) said that they had spent under £20 on postage in the previous month, which is lower than the UK overall (81%).

However, a higher percentage of people in Northern Ireland responded that they didn't know or would prefer not to say (19% vs. 6% for the UK overall).

One in five (21%) had spent less than £1.

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



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 739 Northern Ireland)

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

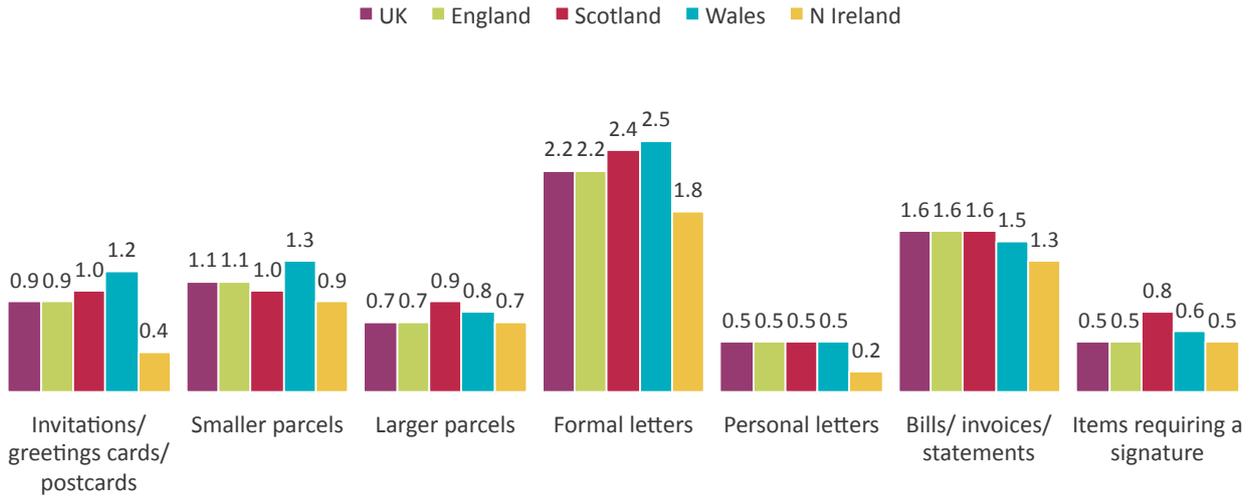
In the previous week, adults in Northern Ireland had received an average of 1.8 formal letters

Adults in Northern Ireland were asked how many items of seven different types of post they had

received in the previous week. On average, they had received 1.8 formal letters and 1.3 bills/ invoices/

statements. For each of the other five types of post, they had received on average less than one item.

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



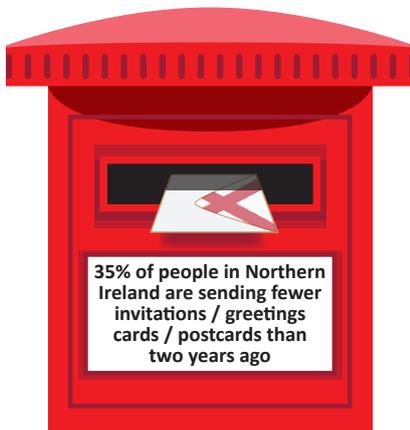
Source: Ofcom Residential Postal Tracker 2016

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?

Six in ten adults in Northern Ireland are using more email instead of post, compared to two years ago

Sixty-two per cent of adults in Northern Ireland report that they are using email more than they did two years ago as a substitute for post, the same level as in the UK overall (65%). More than four in ten (43%) say that they are using texts/ SMS more, and 36% choose mobile phone calls. A quarter mention social networking (25%) and more than one in five say instant messaging (22%).



Fifteen per cent of adults in Northern Ireland say that that they aren't using any form of communication in particular more at the expense of post; this is in line with the UK overall (15%).

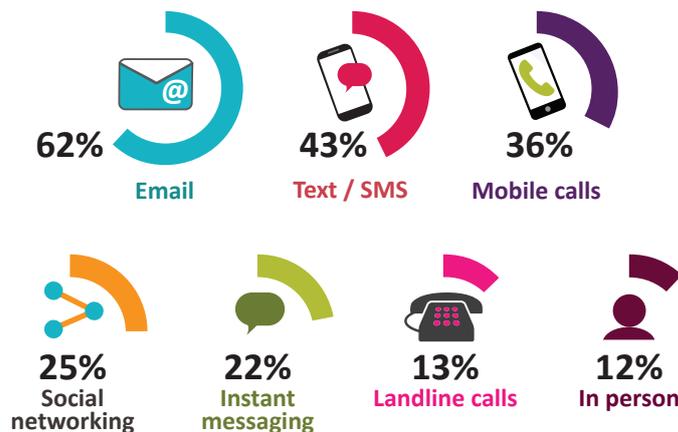
Around four in ten people in Northern Ireland report that they are sending less payments for bills/ invoices/ statements (43%), personal letters (42%) and formal letters (39%) than two years ago. Thirty-five per cent are sending less invitations/ greetings cards/ postcards, while around one in five are sending less larger parcels (21%) and smaller parcels (20%). Seventeen per cent are sending less items requiring a signature, and sixteen per cent are sending less tracked post. These measures are in line with the UK overall, with the exception of formal letters and invitations/ greetings cards/ postcards.

43%
of people in Northern Ireland are sending fewer payments for bills, invoices and statements by post than two years ago

A higher percentage of people in Northern Ireland say that they are sending less of these types of items.

The percentage of people in Northern Ireland claiming to be sending less of each type of item is significantly higher than the percentage of those claiming to be sending more, with the exception of tracked post. Twelve per cent of people claim that they are sending more of this type of post. For each of the other types of post asked about, the percentage of those that say they are sending more than they were two years ago is 11% or less.

Types of communication now being used more than post in Northern Ireland, 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?

6.3 Attitudes toward Royal Mail: residential customers

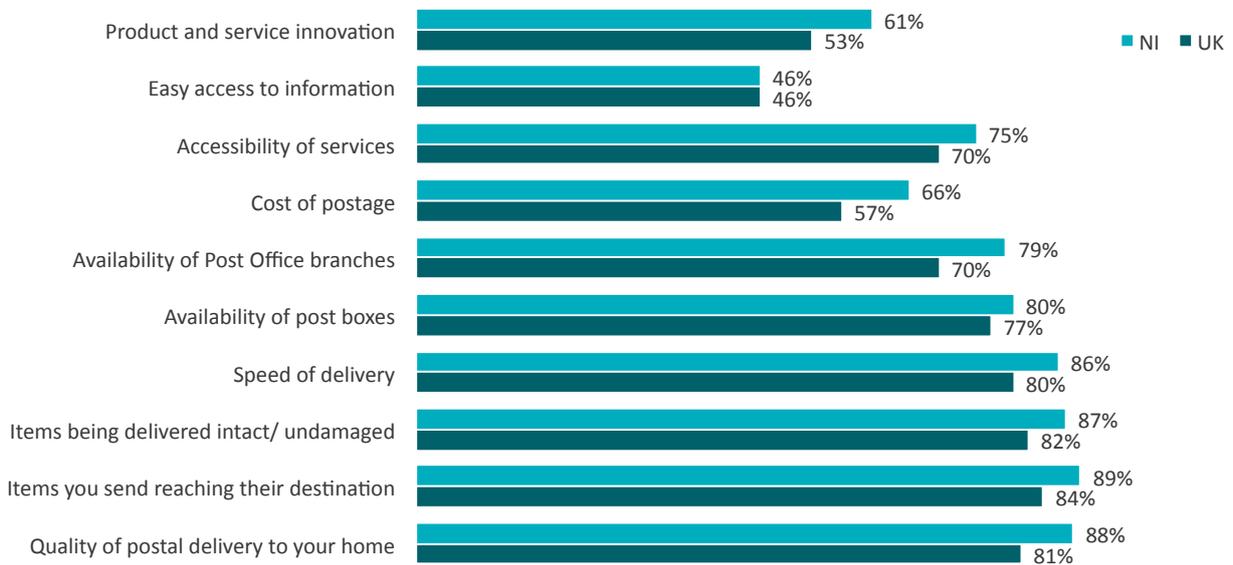
Satisfaction with specific aspects of Royal Mail’s service in Northern Ireland is generally high

People in Northern Ireland are generally satisfied with specific elements of Royal Mail’s service. In particular, nearly nine in ten are satisfied with items sent reaching their destination (89%), quality of postal delivery to the home

(88%), items being delivered intact/ undamaged (87%) and speed of delivery (86%). Satisfaction with all four of these measures is higher in Northern Ireland than in the UK overall, and is lowest for easy-to-access information (46%).

Although not shown in the chart, overall satisfaction with Royal Mail is 88% in Northern Ireland. This is higher than satisfaction overall in the UK (83%).

Figure 6.4: Satisfaction with specific aspects of Royal Mail’s service



Source: Ofcom Residential Postal Tracker 2016

Base: All adults (n = 6419 UK, 739 Northern Ireland)

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

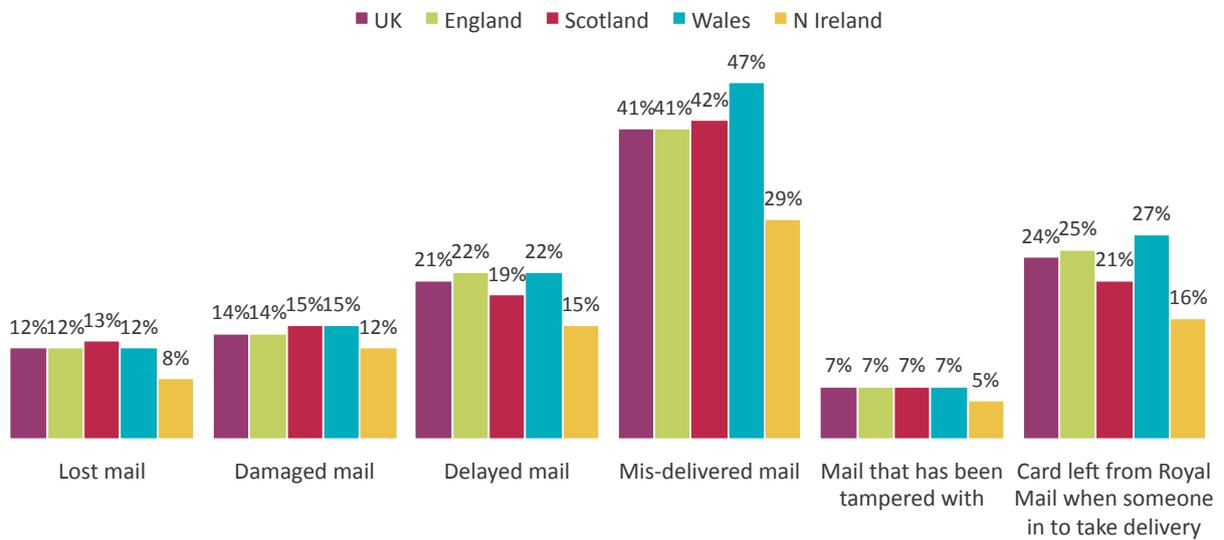
Three in ten adults in Northern Ireland have had a problem with Royal Mail’s service in terms of mis-delivered mail in the past year

Adults in Northern Ireland were provided with a list of potential problems with Royal Mail’s service and asked whether they had experienced any in the past year.

Three in ten (29%) reported that they had experienced problems related to mis-delivered mail; this is lower than in the UK overall (41%). Sixteen per cent had experienced a problem in that Royal Mail had left a card saying that an item

could not be delivered, when someone had been at home to receive it; this is also lower than the UK overall figure (24%). The other problems were experienced by 15% of people or less.

Figure 6.5: 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)

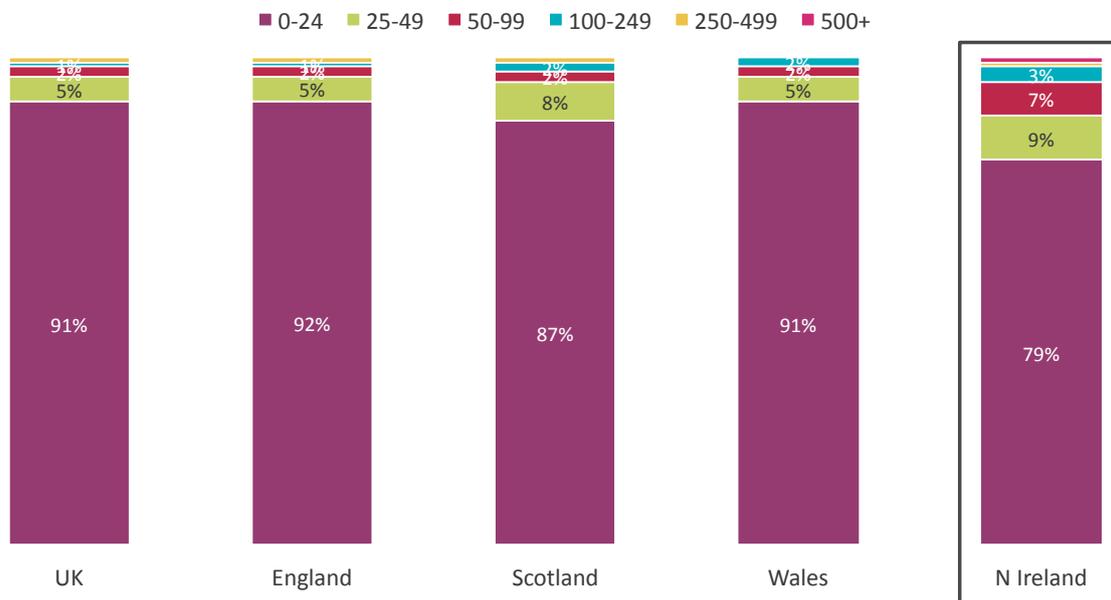
QD13: Which, if any, of these types of communication are you now using more instead of post, compared to two years ago?

6.4 Sending and receiving post: business customers

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

Small and medium-sized enterprises (SMEs) in Northern Ireland were asked how many letters and large letters they send per mailing as an organisation. Eight in ten (79%) send 0-24 of these items; this is lower than the UK overall figure (91%).

Figure 6.6: 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.

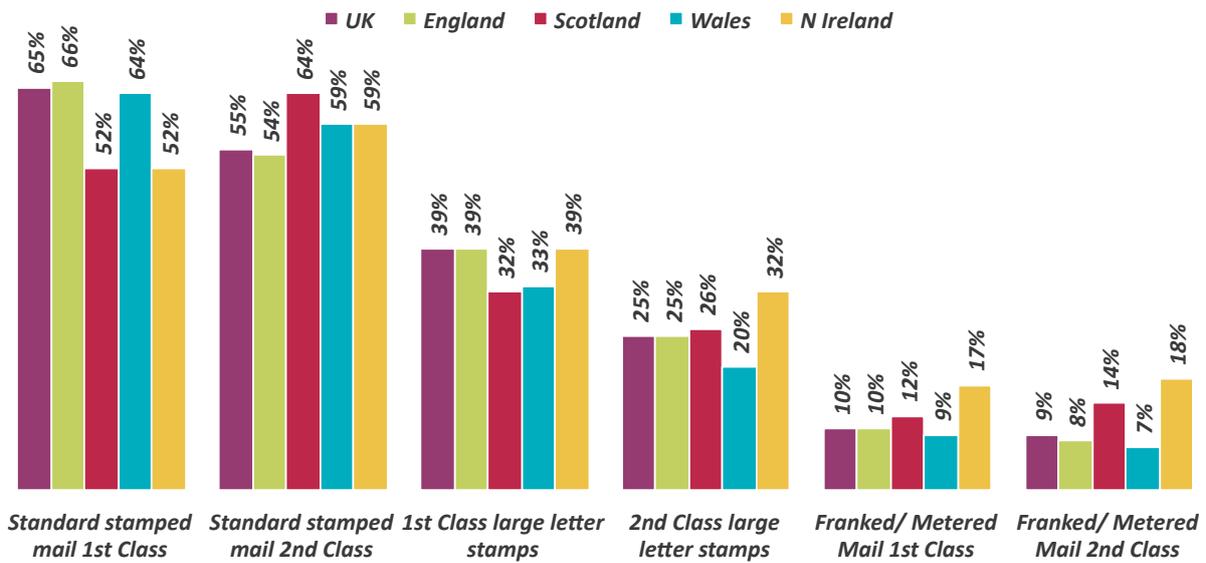
Standard stamped mail was the Royal Mail service used by the most SMEs in Northern Ireland to send letters / large letters

SMEs in Northern Ireland 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 half had used First Class standard stamped mail (52%), lower than in the UK

overall (65%). Six in ten had used Second Class standard stamped mail (59%); this measure is in line with the overall figure for the UK (55%).

Figure 6.7: Royal Mail services used to send standard post each month



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?

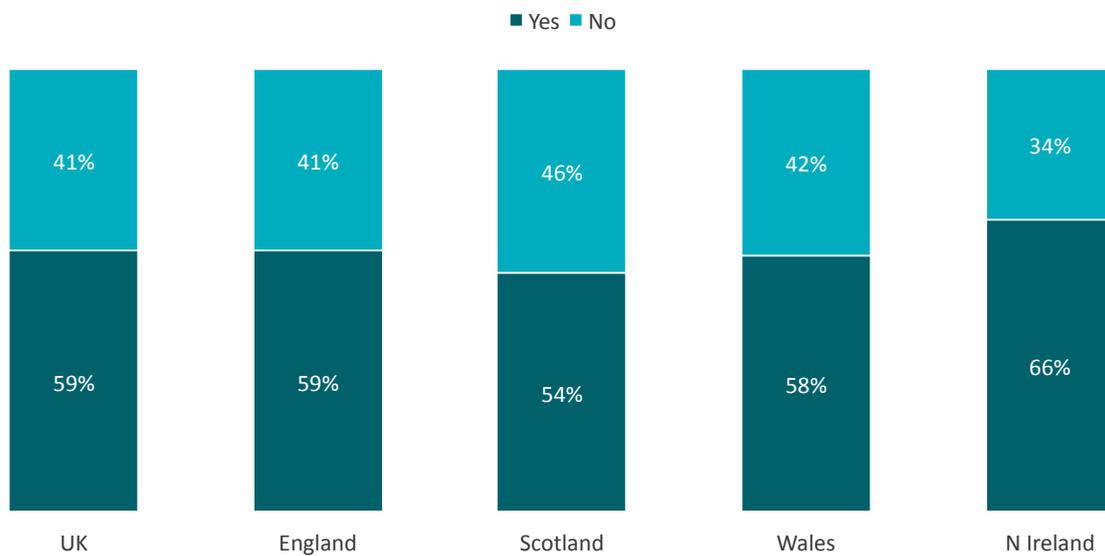
Nearly seven in ten SMEs in Northern Ireland switched some mail to other communication methods in the past year

SMEs were asked whether they had switched any of their mail to other communication methods over the past year. Nearly seven in ten in Northern Ireland (66%) claimed they had done so, higher than in 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 so¹. A quarter of SMEs in Northern Ireland said that they were “happy with sending things by post”

(25%), while eighteen per cent said “no reason”. Thirteen per cent said “we have already moved everything that it is possible to move”.

Figure 6.8: Switched some mail to other communication methods over past 12 months



Source: Ofcom Business Postal Tracker 2016

Base: All respondents (n = 2001 UK, 1259 England, 234 Scotland, 264 Wales, 244 N Ireland)

QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

¹Low base size – 80 people in Northern Ireland responded to this question, so the data should be treated as indicative only

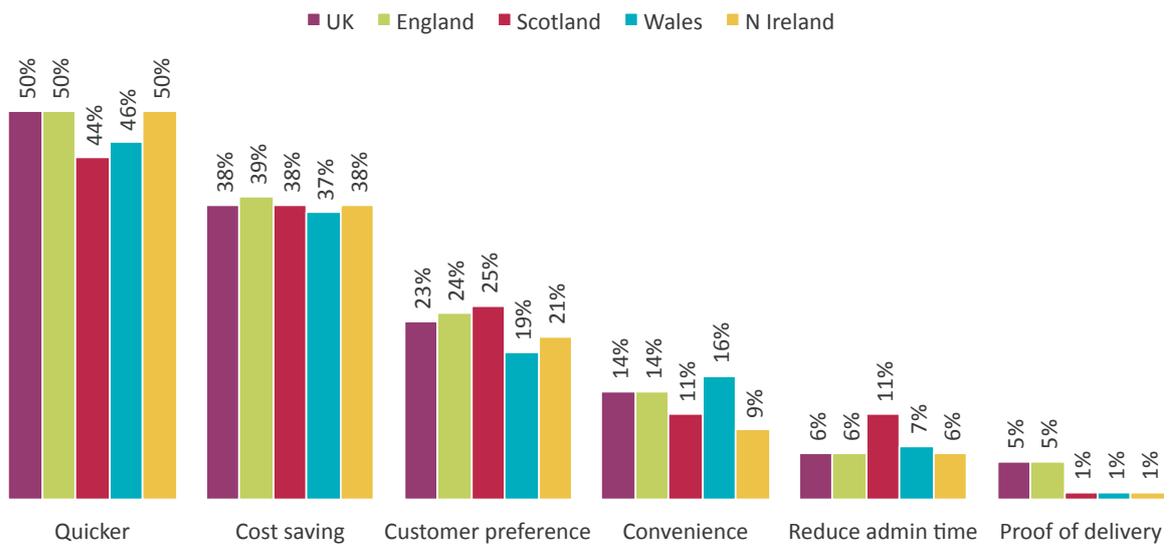
Half of SMEs in Northern Ireland who had switched away from post had done so for reasons of speed

Of those SMEs in Northern Ireland which had moved some of their mail to alternative methods of

communication, half (50%) said this was for reasons of speed. More than a third (38%) said it was to save

money, while for one in five (21%) it was due to customer preference.

Figure 6.9: Main reasons for switching some mail to other communications methods over past 12 months



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

6.5 Attitudes towards Royal Mail: business customers

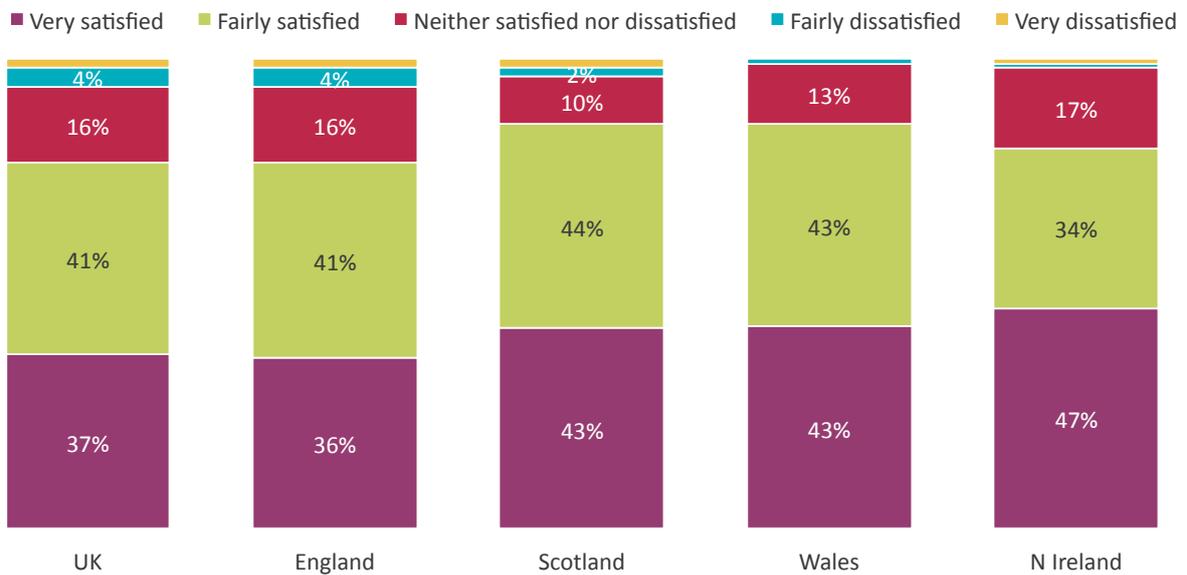
Eight in ten SMEs in Northern Ireland are satisfied with Royal Mail

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

recipient. In Northern Ireland, 82% of SMEs said that they were ‘very satisfied’ or ‘fairly satisfied’. This is in line with the UK overall (78%).

However, the proportion of SMEs in Northern Ireland who are ‘very satisfied’ (47%) is higher than the overall figure for the UK (37%).

Figure 6.10: Overall satisfaction with Royal Mail’s quality of service



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?

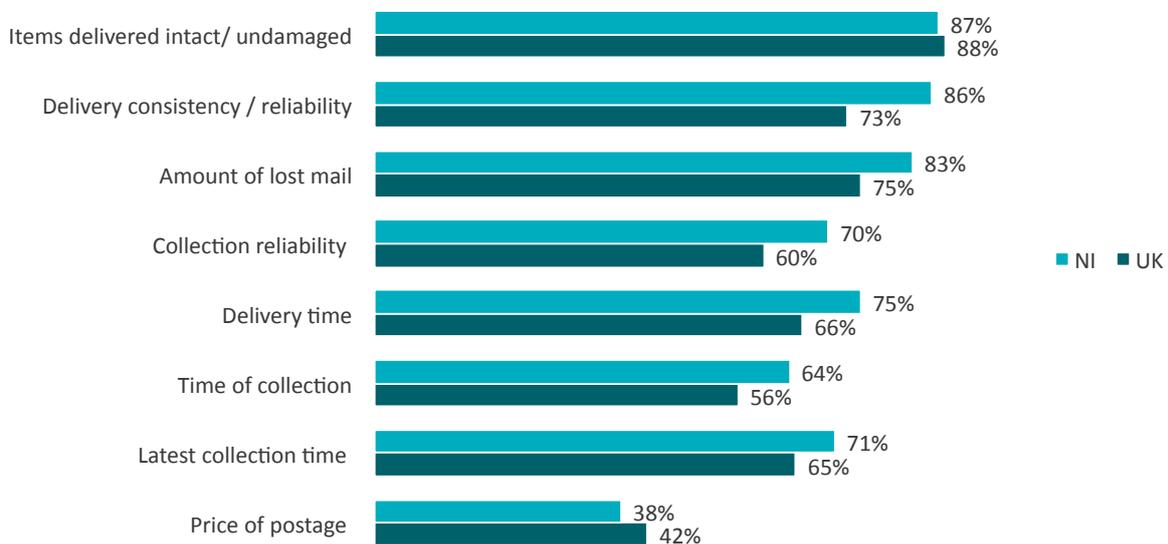
SMEs in Northern Ireland are most satisfied with items being delivered intact/ undamaged, delivery consistency/ reliability and the amount of lost mail

SMEs were also asked about their satisfaction with specific aspects of Royal Mail’s service. SMEs in Northern Ireland were most satisfied with items being delivered intact/ undamaged (87%), delivery consistency/

reliability (86%) and the amount of lost mail (83%). Satisfaction with the latter two elements is higher than in the UK overall. Less than four in ten (38%) said they were satisfied with the price of postage.

Although not shown in the chart below, eight in ten SMEs in Northern Ireland who use Royal Mail (82%) said they had had no problems with their service from Royal Mail in the past six months. This measure is in line with the UK overall figure (81%).

Figure 6.11: 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, 236 Northern Ireland)

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?