

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 130 respondents were interviewed 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 Northern Ireland are approximately +/- 5-9%.

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 143 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 Northern Ireland are approximately +/- 5-8%.

6.1 Recent developments in Northern Ireland

Extra post boxes for Northern Ireland

Royal Mail has installed an additional 180 post boxes in Northern Ireland in the past year. This is part of its commitment to maintain its provision of post boxes across the UK, under the universal service obligation, and to help boost public access to post boxes, particularly in rural areas.

Parcel surcharging

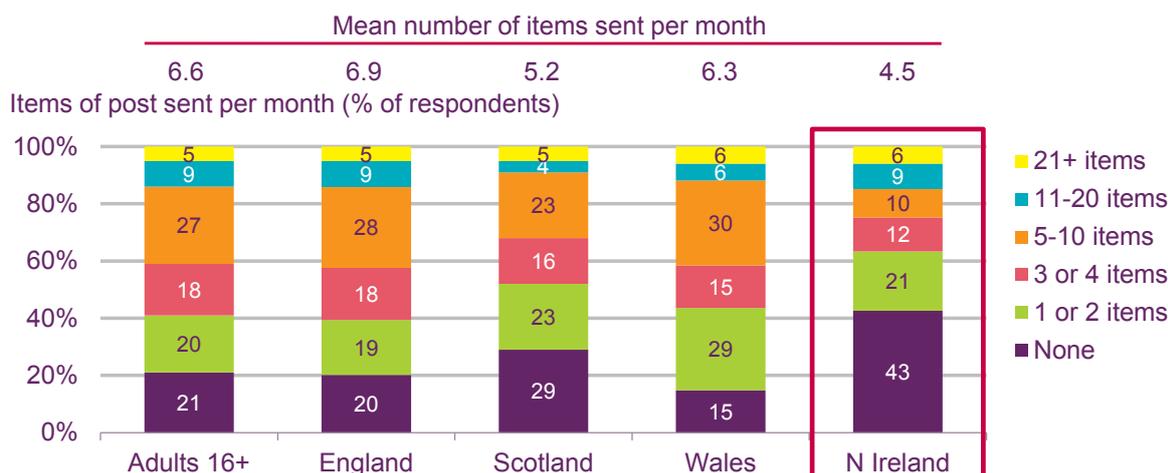
Individuals and consumer organisations continue to highlight that customers in rural, remote or distant locations can be subject to surcharges for parcel delivery, where the parcel falls outside the universal service for which a uniform price is applied. Ofcom is in the process of gathering information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

6.2 Sending and receiving post: residential customers

Adults in Northern Ireland sent fewer items of post than any other UK nation

Four in ten residents in Northern Ireland (43%) had not sent any items through the post in the past month, a higher proportion than in any other UK nation. The average number of items sent is, as a result, far lower than the UK figure (4.5 vs. 6.6).

Figure 6.1 Approximate number of items of post sent each 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?

The average number of parcels sent per person in Northern Ireland is in line with the UK average

Just over half of adults in Northern Ireland (53%) said they had not sent a parcel through the post in the past month; this is broadly similar to all other UK nations. Nearly four in ten people in Northern Ireland (37%) said they had sent one or two parcels in the past month.

Figure 6.2 Approximate number of parcels sent in the past month



Source: Ofcom Residential Postal Tracker 2015

Base: All respondents who have 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?

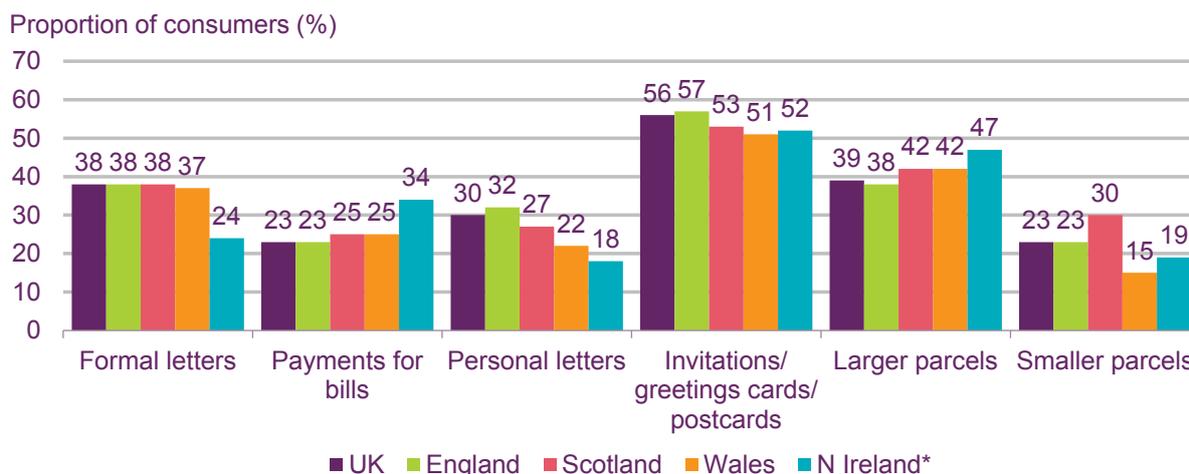
*Caution: low base

Adults sending post in Northern Ireland are more likely than those in other nations to send payments for bills

Three in ten adults in Northern Ireland (34%) said that they had personally sent payments for bills in the past month: this is more than in the UK overall (23%). As with the other nations,

the reported use of mail for personal letters (18%) is low, perhaps as a result of take-up of digital messaging platforms. Nearly half of all adults in Northern Ireland (47%) said they had sent larger parcels in the past month.

Figure 6.3 Types of post sent in the past month



Source: Ofcom Residential Postal Tracker 2015

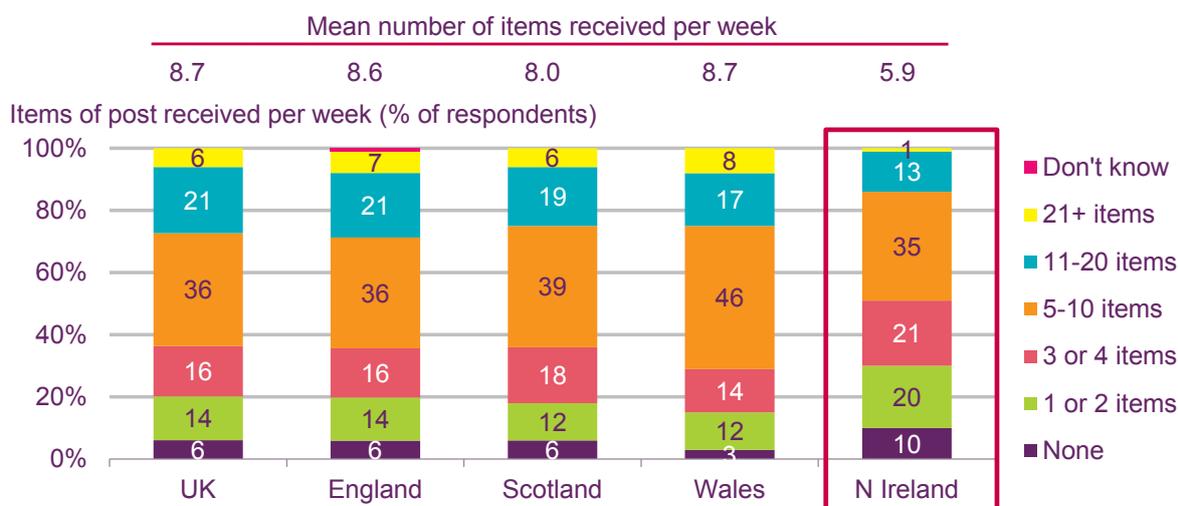
Base: All who have personally sent any items of post in the last week (n = 1491 UK, 1131 England, 152 Scotland, 127 Wales, 81 Northern Ireland)

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

One in ten people in Northern Ireland said they had received no post in the past week

Adults in Northern Ireland reported receiving fewer items of post per week than those in the UK as a whole. Four in ten adults in Northern Ireland (41%) said they had received between one and four items in the past month, compared to 30% in the UK overall.

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



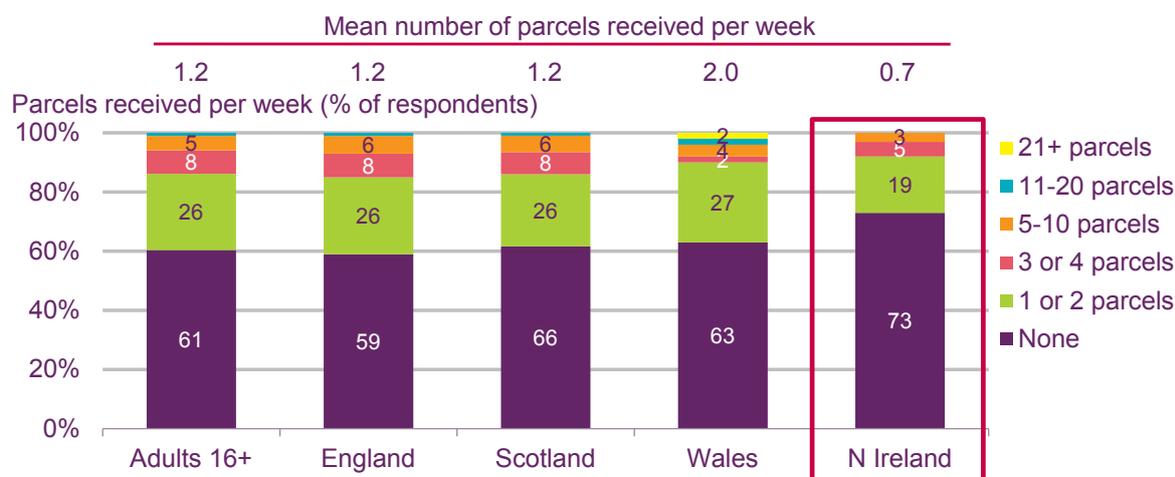
Source: Ofcom Residential Postal Tracker 2015

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?

Nearly three-quarters of adults in Northern Ireland who had received post in the previous week had not received any parcels

Seventy-three per cent of those who had received any items of post in the past week in Northern Ireland had not received any parcels: more than in the other UK nations. Just under two in ten (19%) said they had received one or two parcels.



Source: Ofcom Residential Postal Tracker 2015

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

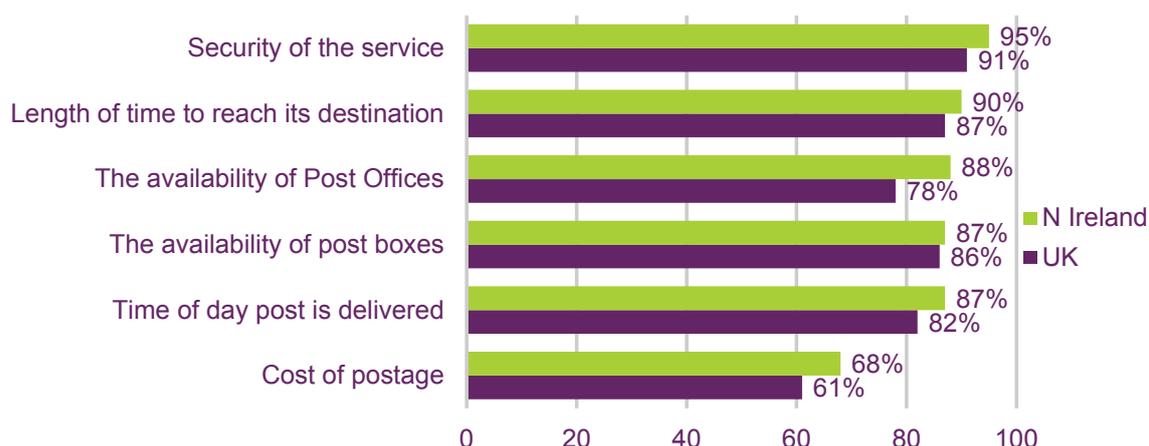
QD2. And how many of these items received in the last week were parcels?

6.3 Attitudes toward Royal Mail

Satisfaction with many aspects of Royal Mail's service is high in Northern Ireland

Respondents in Northern Ireland were asked about their satisfaction with certain aspects of Royal Mail's service. Nine in ten adults said they were satisfied with the security of the service (95%) and with the length of time post took to reach its destination (90%). Availability of services was also rated highly in terms of satisfaction: nine in ten adults said they were satisfied with the availability of Post Offices (88%) and with post boxes (87%). Nearly seven in ten adults (68%) in Northern Ireland said they were satisfied with the cost of postage, although this was the attribute with the lowest satisfaction level in Northern Ireland.

Figure 6.5 Satisfaction with specific aspects of Royal Mail's service

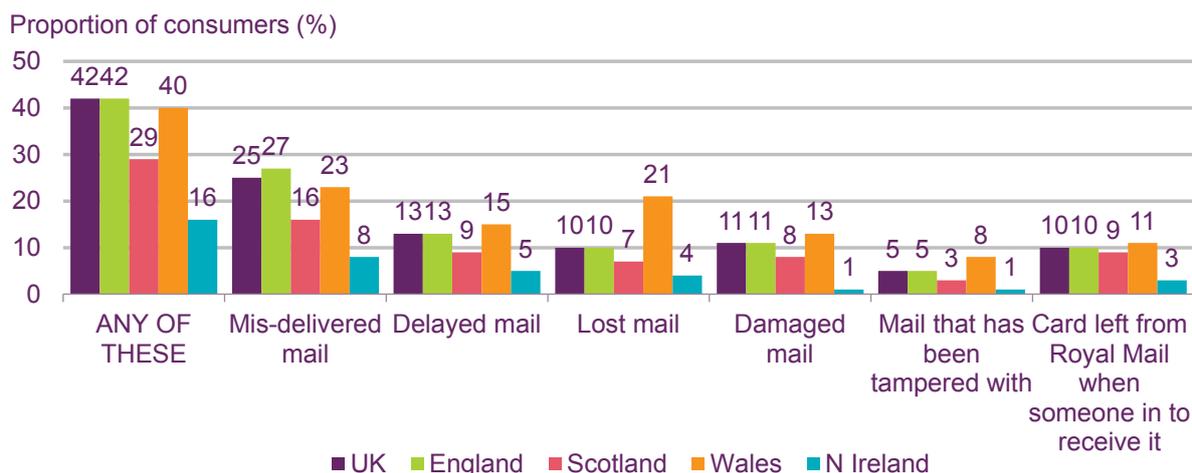


Source: Ofcom Residential Postal Tracker 2015
 Base: All respondents in N. Ireland (n = 1946 UK, 130 N Ireland)
 QE3A-F. Satisfaction with specific aspects of Royal Mail's services – Ranked by proportion satisfied among adults in N. Ireland.

Fewer adults in Northern Ireland than in any other UK nation had experienced a problem with Royal Mail in the past year

Adults in Northern Ireland were asked if they had experienced any problems with Royal Mail's services in the past 12 months. Less than a fifth (16%) reported experiencing any of the listed problems in the past year, less than in any other UK nation. The most commonly reported problem experienced by adults in Northern Ireland was mis-delivered mail (8%).

Figure 6.6 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 past 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

One in ten businesses in Northern Ireland send more than 250 letters a month

Businesses in Northern Ireland were asked how many letter items they sent on average each month. A third of businesses in Northern Ireland (33%) said that they sent more than 50 letters each month, while less than half (45%) said they sent up to 24 letters on average per month.

Figure 6.7 Average volume of letters sent each month

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker 2015

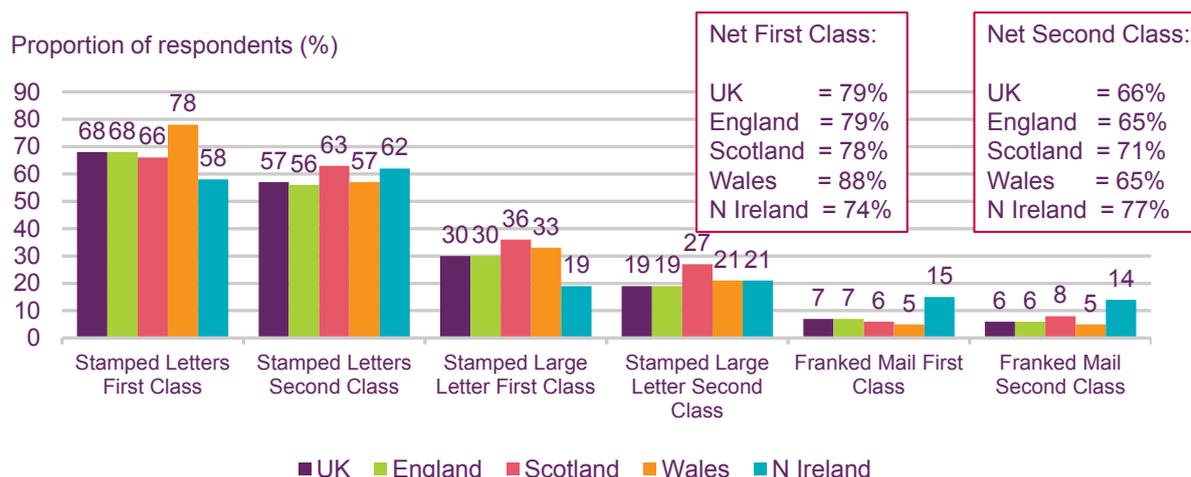
Base : All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N Ireland)

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.

Franked First and Second Class products are more popular in Northern Ireland than the UK average

More businesses in Northern Ireland than in other nations in the UK reported using franked services to send mail: 15% had sent First Class franked mail and 14% said they used Second Class franked mail. More than three-quarters of businesses in Northern Ireland (77%) said they used Second Class services, which again, is higher than the UK average.

Figure 6.8 Royal Mail services used to send standard post each month



Source: Ofcom Business Postal Tracker 2015

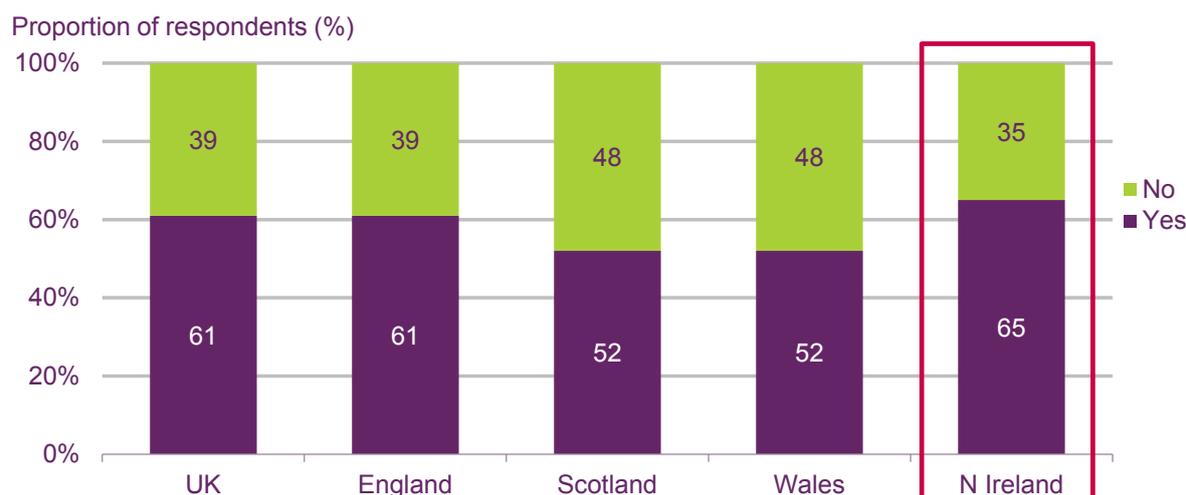
Base: All respondents using RM standard delivery services (n = 1121 UK, 686 England, 146 Scotland, 155 Wales, 134 N Ireland)

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

Around two-thirds of businesses had switched some of their post to another communication method in the past year

Businesses were asked whether they had switched any of their mail to other communication methods in the past twelve months. Around two-thirds of businesses in Northern Ireland (65%) reported that they had done so.

Figure 6.9 Switched some mail to other communication methods over past year



Source: Ofcom Business Postal Tracker 2015

Base: All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N Ireland)

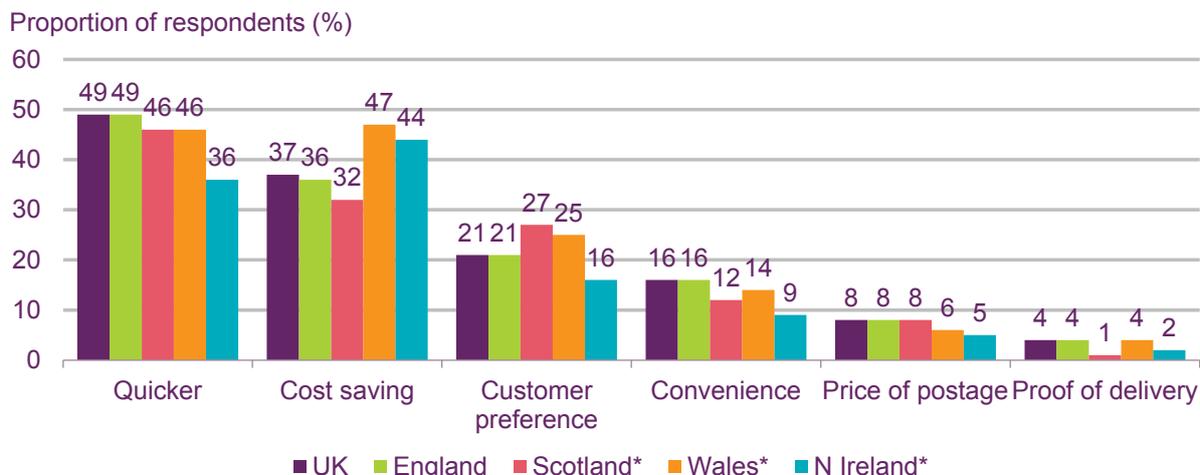
QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

Cost saving is the key reason for switching from post in Northern Ireland

Of those businesses in Northern Ireland who said they had moved some of their mail to other methods of communication, cost saving was highlighted as the key reason. Speed and customer preference were also highlighted as reasons for switching from mail.

When asked why some businesses had not moved any mail to other communication methods in the last 12 months, the most popular response other than 'no reason' was 'we have already moved everything that is possible to move'.

Figure 6.10 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

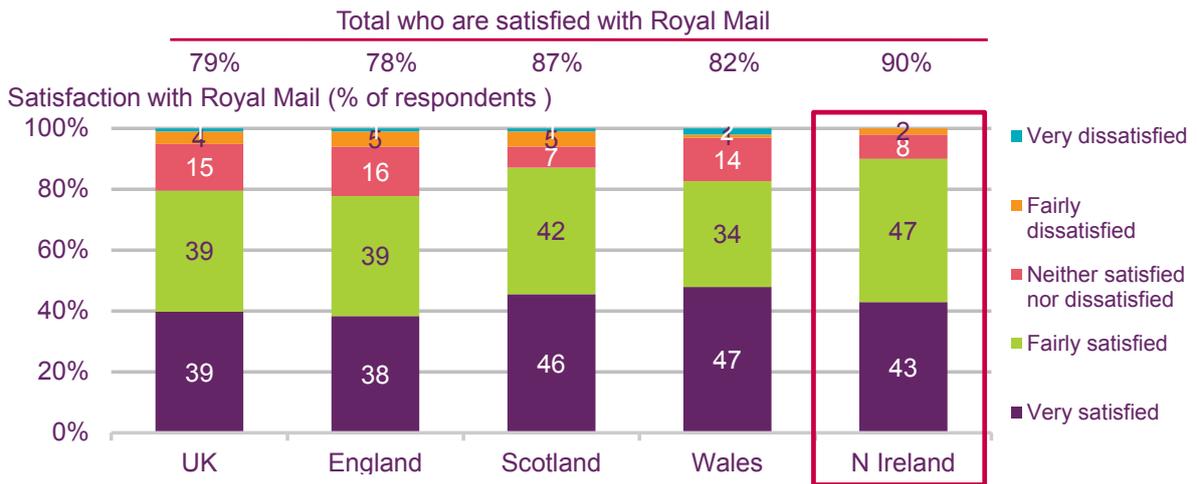
*Caution: low base

6.5 Satisfaction with Royal Mail – business customers

Satisfaction with Royal Mail is higher in Northern Ireland than the UK average

Nine in ten businesses in Northern Ireland reported that they were 'very satisfied' or 'fairly satisfied' with the overall quality of service from Royal Mail, which is higher than the UK overall. Another 8% of businesses in Northern Ireland reported that they were 'neither satisfied nor dissatisfied' with quality of service overall.

Figure 6.11 Overall satisfaction with Royal Mail quality of service



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)

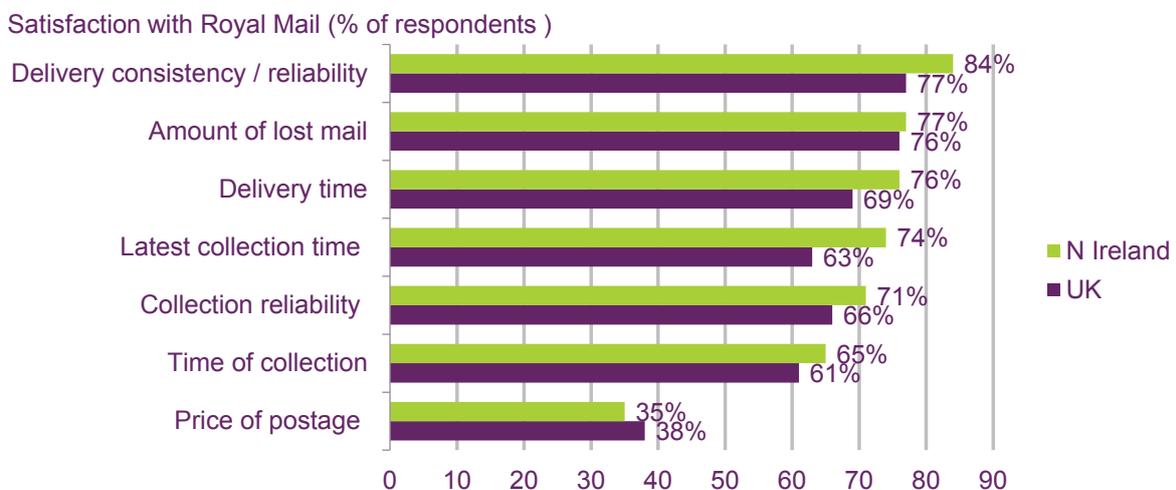
QRM2. Thinking generally about the service your organisation receives as a whole, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the overall quality of the services you receive from Royal Mail as a recipient and sender?

Reliability of delivery and collection times may be driving the higher satisfaction

When asked about specific aspects of satisfaction with Royal Mail, a high proportion of business respondents (84%) said they were satisfied with delivery consistency and reliability. More than three-quarters of respondents also said they were satisfied with the amount of lost mail (77%) and with delivery time (76%). However, less than four in ten businesses (35%) said they were satisfied with the price of postage.

Among businesses in Northern Ireland who use Royal Mail, more than eight in ten (84%) said they had had no problems with their service when sending or receiving mail in the past six months.

Figure 6.12 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, 130 N 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?