

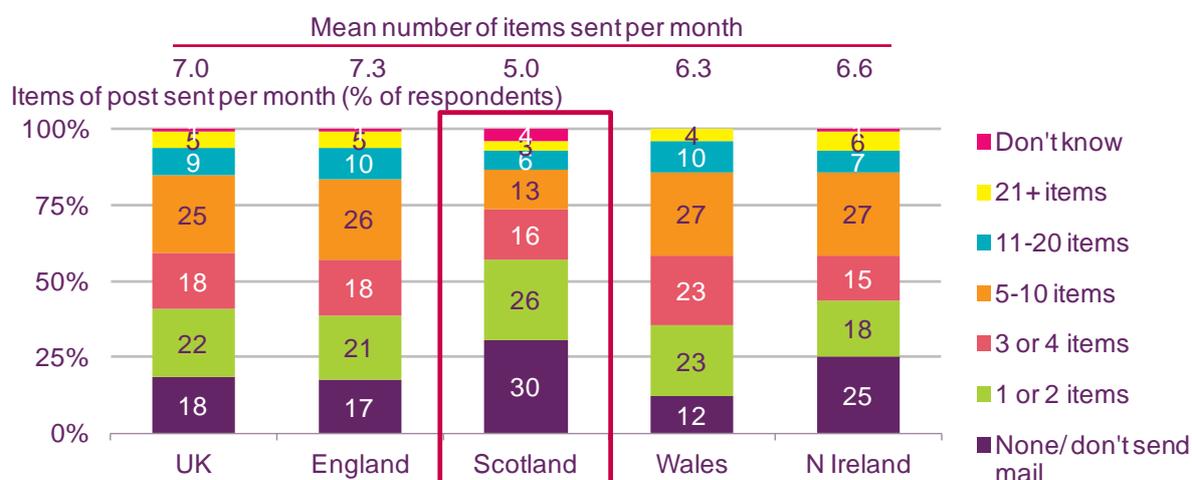
6 Post

6.1 Sending and receiving post in Scotland – residential customers

People in Scotland send the fewest items of post and are least likely to send post at all

Adults in Scotland claim to send an average of 5.0 items of post in an average month compared to 7.0 items across the UK as a whole, with three in ten (30%) claiming not to have posted anything in the past month (Figure 6.1).

Figure 6.1 Approximate number of items of post sent each month

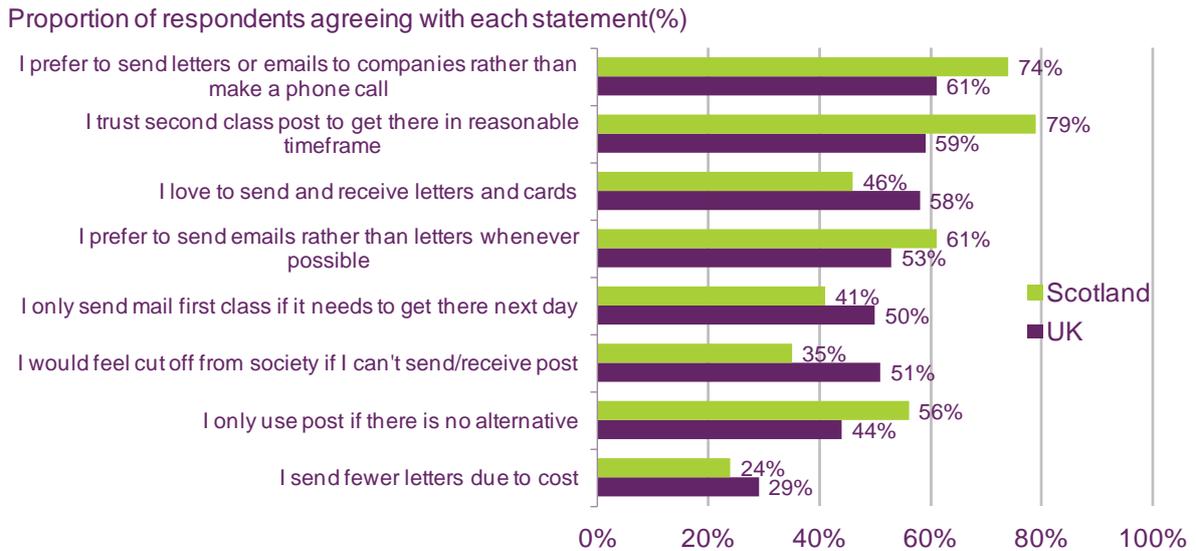


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)
 QC1. Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Six in ten adults in Scotland prefer to send emails rather than letters

The lower stated use of post in Scotland might be at least partly explained by the differing attitudes in this nation compared to the UK average (Figure 6.2). A higher proportion of respondents in Scotland compared to the UK overall agree with the statements 'I prefer to send emails rather than letters' (61% v 53%) and 'I only send post if there is no alternative' (56% v 44%).

Figure 6.2 Attitudes to sending/receiving post

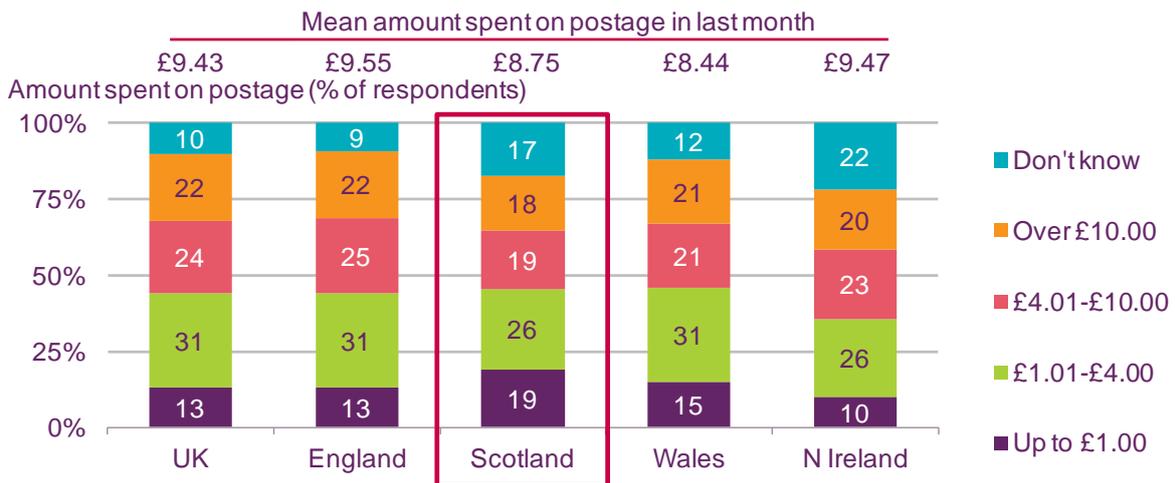


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All respondents (n = 4844 UK, 811 Scotland)
 QH2A-H. SHOWCARD - AGREEMENT WITH STATEMENTS ABOUT SENDING/ RECEIVING POST

Almost a fifth of adults in Scotland say they spend less than £1 on postage each month

People in Scotland are the most likely to have spent lower amounts on postage in the past month, with 19% spending less than £1, compared to 13% across the UK (Figure 6.3). This is driven by the number of people spending fifty pence or less (11% in Scotland v 5% across the UK).

Figure 6.3 Approximate spend on postage for items sent in past month



Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All who have personally sent any items of post in the last week (n = 3889 UK, 2267 England, 595 Scotland, 503 Wales, 524 N Ireland)
 QC4. Approximately how much did you spend on the postage used for the items that you sent in the last month – including letters, cards and parcels?

Despite trust in Second Class, First Class is the preferred option for letters or cards

While nearly eight in ten (79%) say they trust Second Class post to 'get there in a reasonable amount of time', people in Scotland are more likely to say they use First Class postage. Almost half (49%) say they use this method all the time, compared to 42% across the UK as a whole (Figure 6.4). This preference is reflected in their perceptions of value for money of a First Class stamp; 31% agree that it is very good value, compared to just 14% across the UK as a whole. Second Class stamps are also seen as offering very good value among residents in Scotland (27% v 11% across the UK as a whole).

Figure 6.4 Services used to send letters or cards



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?

The price increase of stamps did not affect people in Scotland's use of post

When asked about the impact of the price rise of First and Second Class stamps in April 2012 on the amount of stamps they bought, over three-quarters (77%) of people in Scotland said they had continued to buy the same amount, compared to 60% across the UK as a whole.

Figure 6.5 Impact of price increase on purchase of First and Second class stamps



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

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 N Ireland)

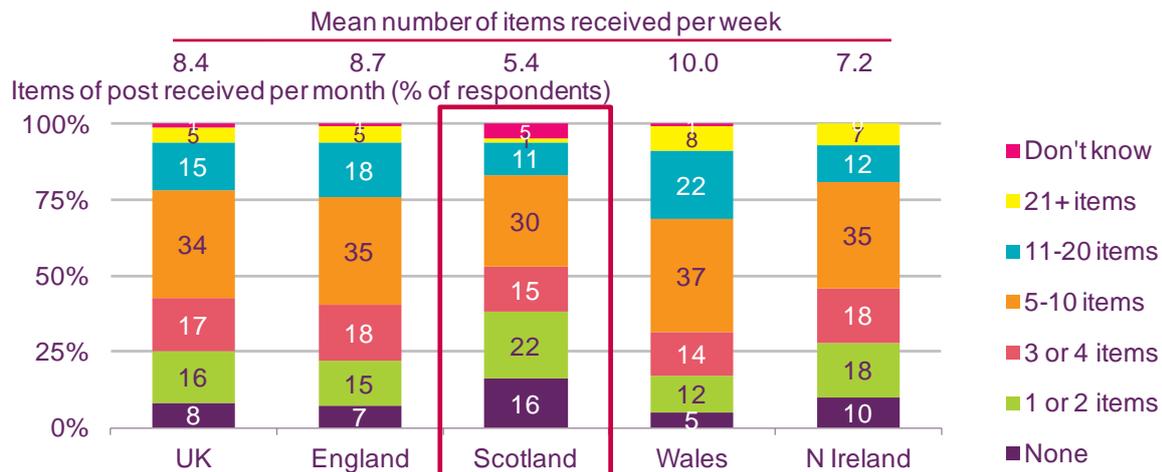
QF8. As you may know, the price of first and second class postage increased on 30th April 2012.

Which of these statements best describes the impact, if any, of the price rise on the stamps you have bought since then? MULTICODE

People in Scotland receive the fewest items of post each week

Eighty per cent of people in Scotland say they received any post in the past week compared to 91% across the UK. The volume of letters, cards or parcels received by households in Scotland is also much less than the UK average of 8.4 items received per week. This is largely driven by the finding that 16% of respondents in Scotland claim not to have received any items in the past week, compared to just 8% across the UK as a whole. Of those that had received post, this is more likely to be just one or two items than in the rest of the UK.

Figure 6.6 Approximate number of items received in the past week



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

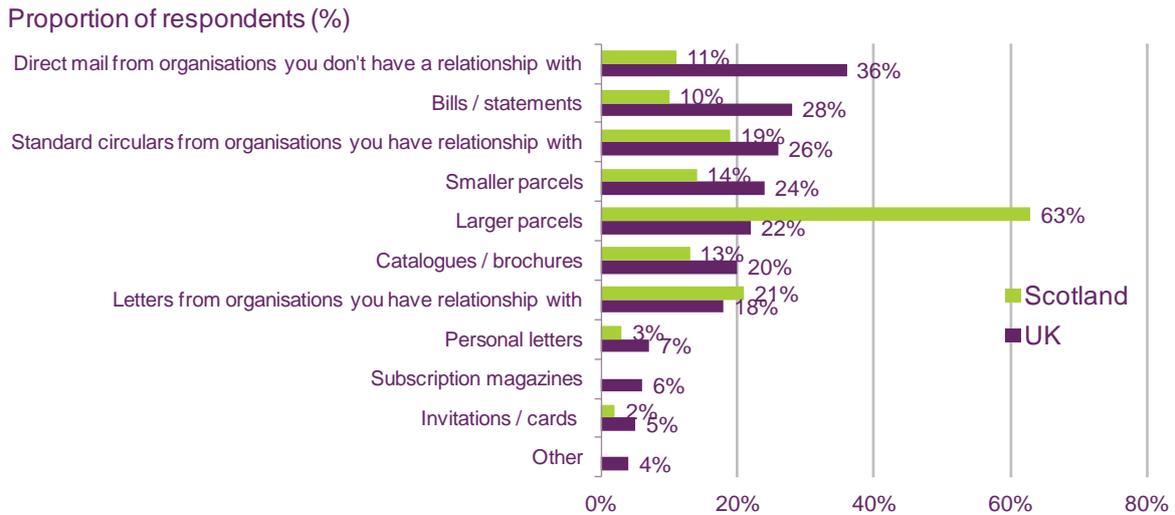
Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 N Ireland)

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

People in Scotland claim the amount of post they receive has increased over the past two years, driven by an increase in the amount of parcels received

Taking into account those who say the amount has increased and those who claim they send fewer items, respondents in Scotland perceive the amount to have increased (18% net). This is particularly driven by a significant increase in the amount of parcels they now receive; 63% of people in Scotland say they now receive more larger parcels compared to 22% across the UK as a whole (Figure 6.7).

Figure 6.7 Type of items people are receiving more often now



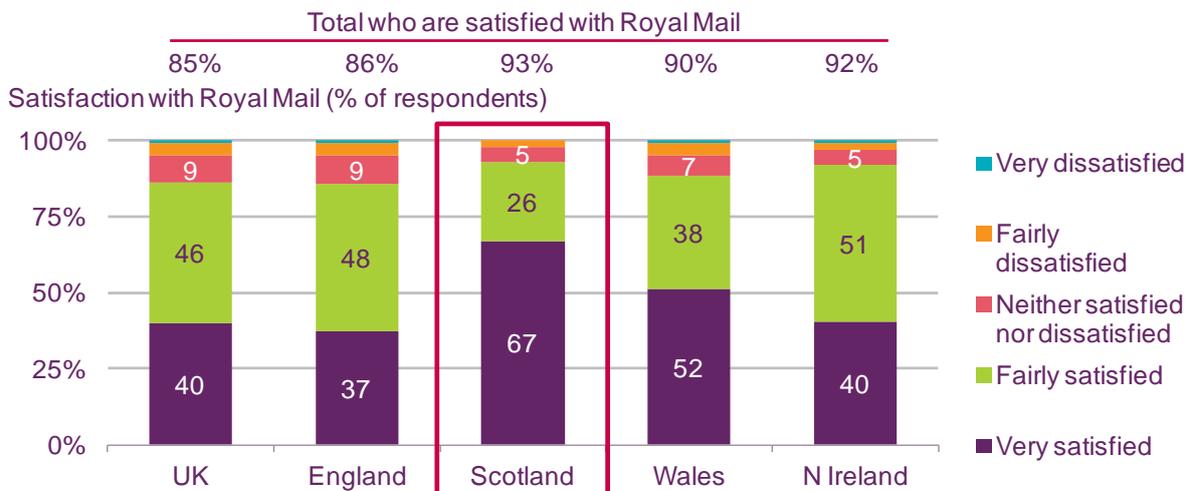
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All who say the number of items received by post has increased compared to two years ago (n = 1181 UK, 202 Scotland)
 QD6. Which of these types of addressed items are you personally receiving more often through the post now?

6.2 Attitudes towards Royal Mail in Scotland

Overall, residents in Scotland are more likely than people across the rest of the UK to be very satisfied with Royal Mail

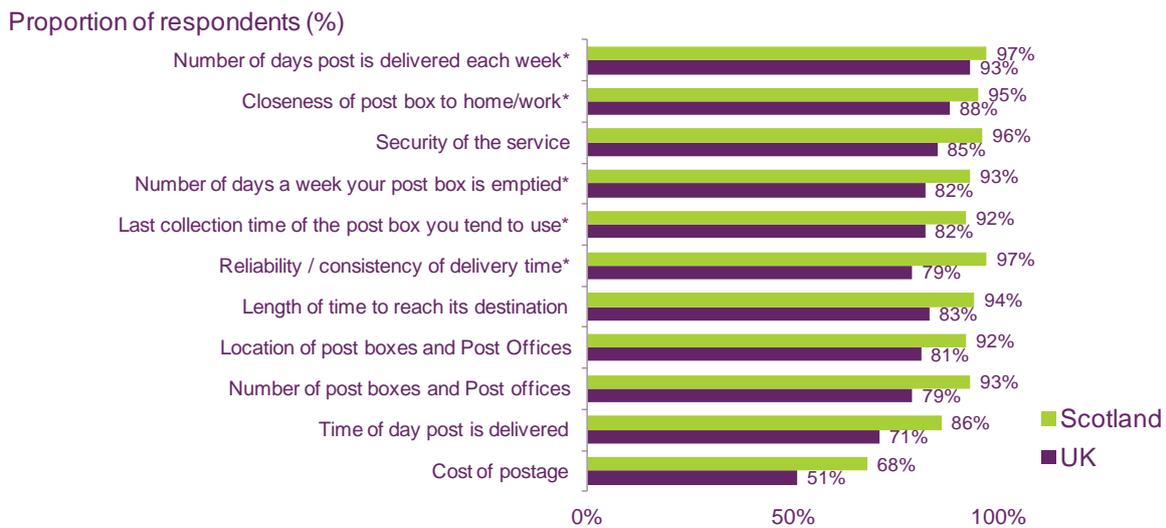
We asked people about their satisfaction with Royal Mail. Those in Scotland are significantly more likely to say they are very satisfied, compared to people across the whole of the UK (67% v 40%). Overall, 93% of people in Scotland are satisfied with Royal Mail. Figure 6.9 shows that this satisfaction applies to all aspects of Royal Mail's service, in particular the reliability and consistency of the delivery times. People in Scotland are more likely to be satisfied with the cost of postage compared to those across the UK overall (68% v 51%).

Figure 6.8 Overall satisfaction with Royal Mail



Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013
 Base: All respondents (from Q1 2013) (n = 2397 UK, 1380 England, 402 Scotland, 286 Wales, 329 Northern Ireland)
 QE5. How would you rate your overall satisfaction with Royal Mail?

Figure 6.9 Satisfaction with specific aspects of Royal Mail's service



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

Base: All respondents (n = 4844 UK, 811 Scotland) *from Q1 2013 n = 2397 UK, 402 Scotland
 QE3A-K: SHOWCARD - SATISFACTION WITH ASPECTS OF ROYAL MAIL'S SERVICE

6.3 Sending and receiving post – business customers

For businesses in Scotland, the role of post is mainly administrative, with less than £1000 spent on it each year

When asked about the role of post within their business, over half (56%) of businesses within Scotland say it is mainly administrative, compared to 51% across the UK. Reflecting this attitude, 71% of the businesses we surveyed in Scotland spend less than £1000 each year on sending post (Figure 6.10).

Figure 6.10 Monthly spend on sending postal items



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

Base: All respondents (n = 1604 UK, 1023 England, 214 Scotland, 193 Wales, 174 N Ireland)
 QV1. On average, how much money does your organisation spend per month on sending mail items?
 Please think about all the letters, packets and parcels you may send as an organisation.

Businesses in Scotland are more likely to use Second Class stamps to send letters

Ninety eight per cent of businesses in Scotland use Royal Mail with 79% using no other provider. Figure 6.11 shows that among businesses who use Royal Mail services, those in Scotland are significantly more likely than businesses across the UK as a whole to use Second Class stamps to post standard letters (68% v 60%). Fifty five per cent of organisations in Scotland say they use Second Class when there is no urgency with the mail they are sending compared to 61% across the UK as a whole.

Figure 6.11 Royal Mail services used to send letters



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)

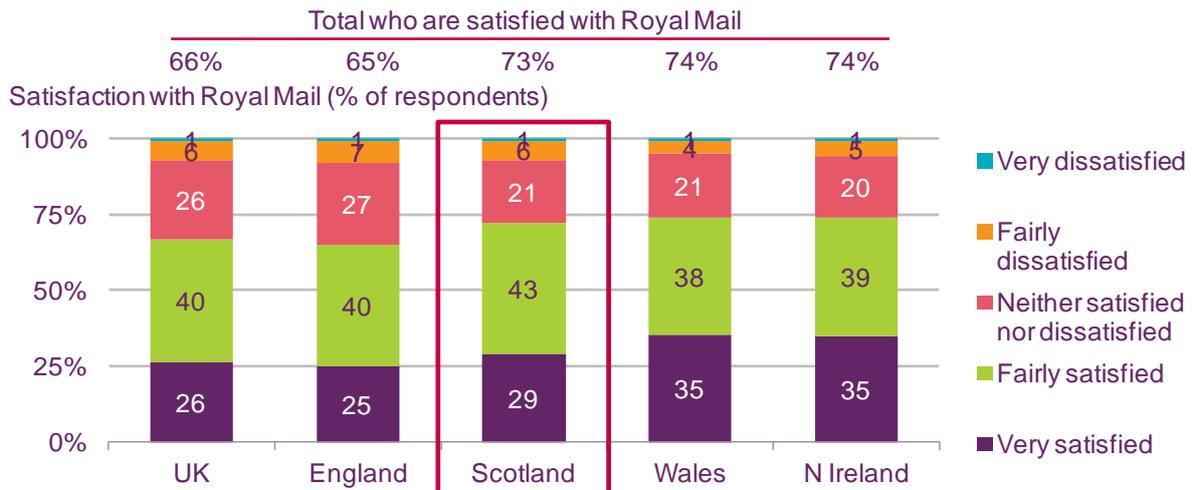
QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

Nearly three-quarters of business customers in Scotland are satisfied with the quality of the service they receive from Royal Mail

When asked about the quality of the service they receive from Royal Mail, both as sender and recipient, 73% of organisations in Scotland say they are satisfied, compared to two-thirds (66%) across the UK.

Considering specific aspects of the Royal Mail service, businesses in Scotland are more likely to be satisfied with the delivery service compared to organisations across the UK. In particular, nine in ten are satisfied with the daily delivery (90% v 78% across the UK), 70% are satisfied with the consistency of the delivery service (64% across the UK) and 60% are satisfied with the delivery time (53% across the UK). For the UK as a whole, trustworthiness is the aspect that prompts the greatest level of satisfaction (81%).

Figure 6.12 Overall satisfaction with the quality of service from Royal Mail

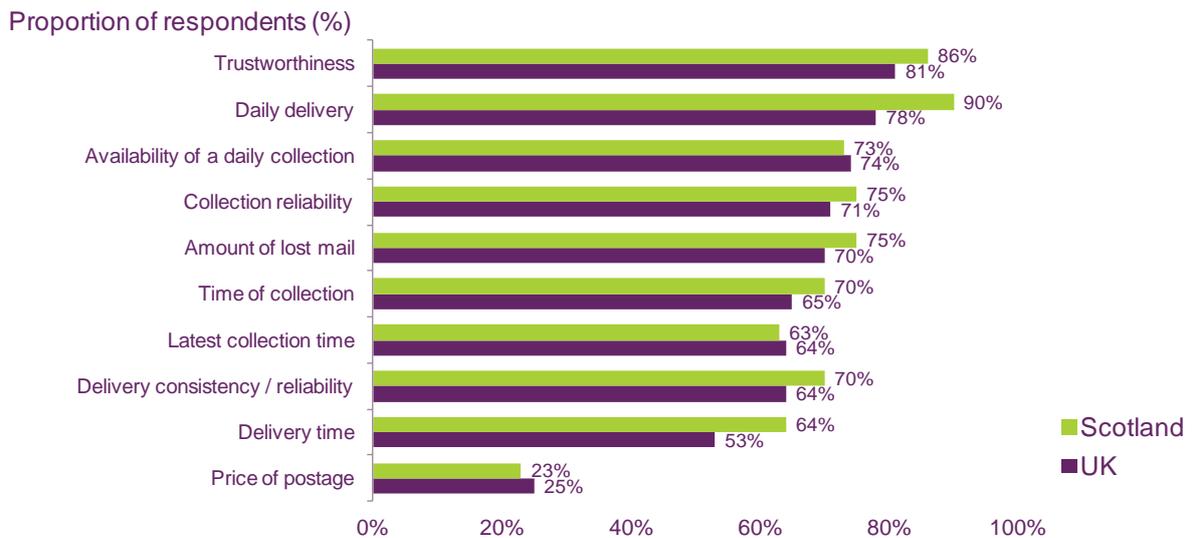


Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base: All respondents who use Royal Mail (n = 1566 UK, 988 England, 209 Scotland, 188 Wales, 171 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?

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



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

Base: All respondents who use Royal Mail (n = 1566 UK, 988 England, 209 Scotland, 188 Wales, 171 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?