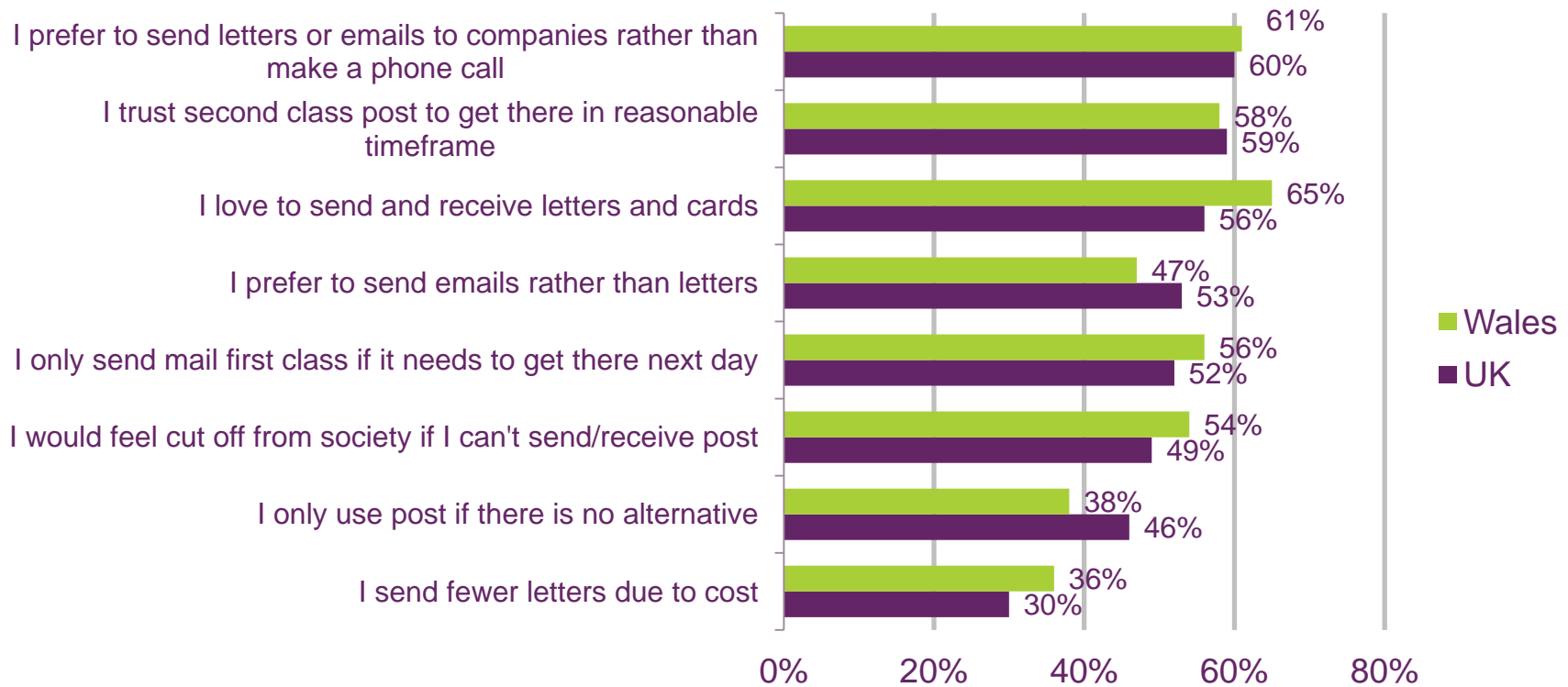


Post CMR Wales slide deck

Figure 6.1

Attitudes to statements about sending / receiving post



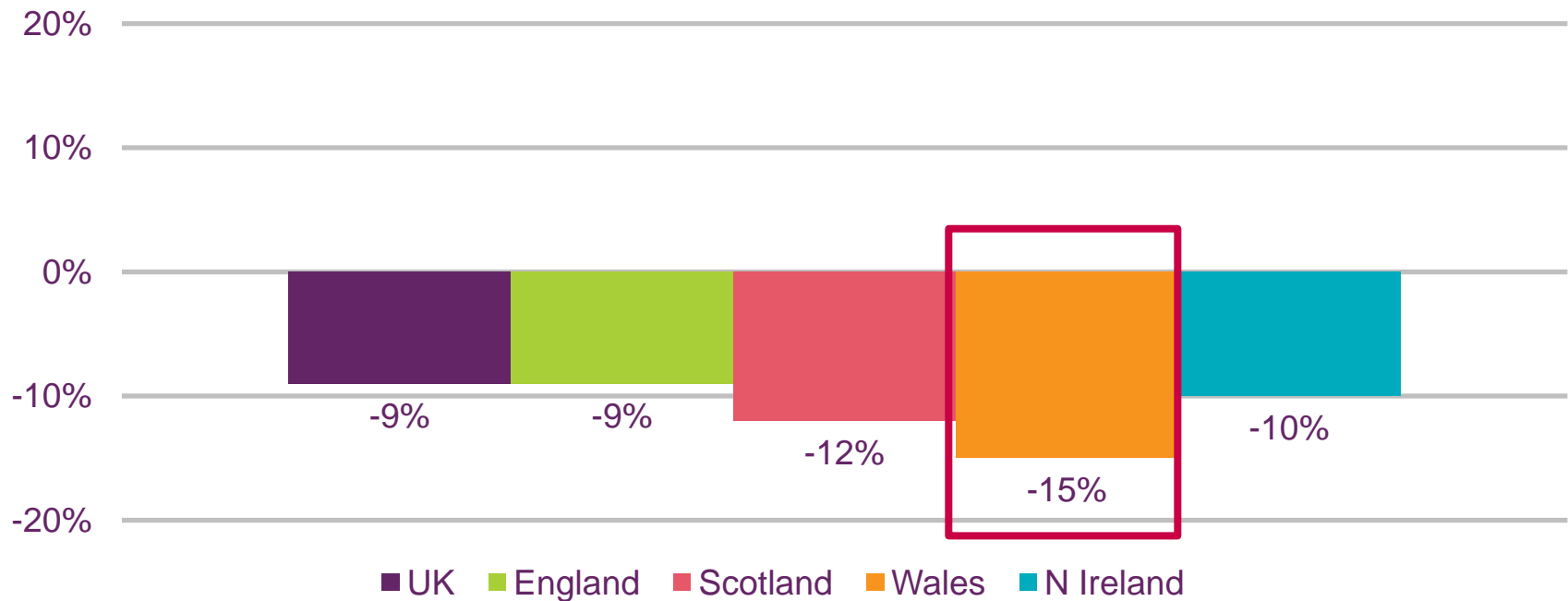
Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

Base: All respondents (n = 3671 UK, 613 Scotland)

QH2A-H. SHOWCARD - AGREEMENT WITH STATEMENTS ABOUT SENDING/ RECEIVING POST

Figure 6.2

Net claimed changes in the amount of post sent in the last two years



Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

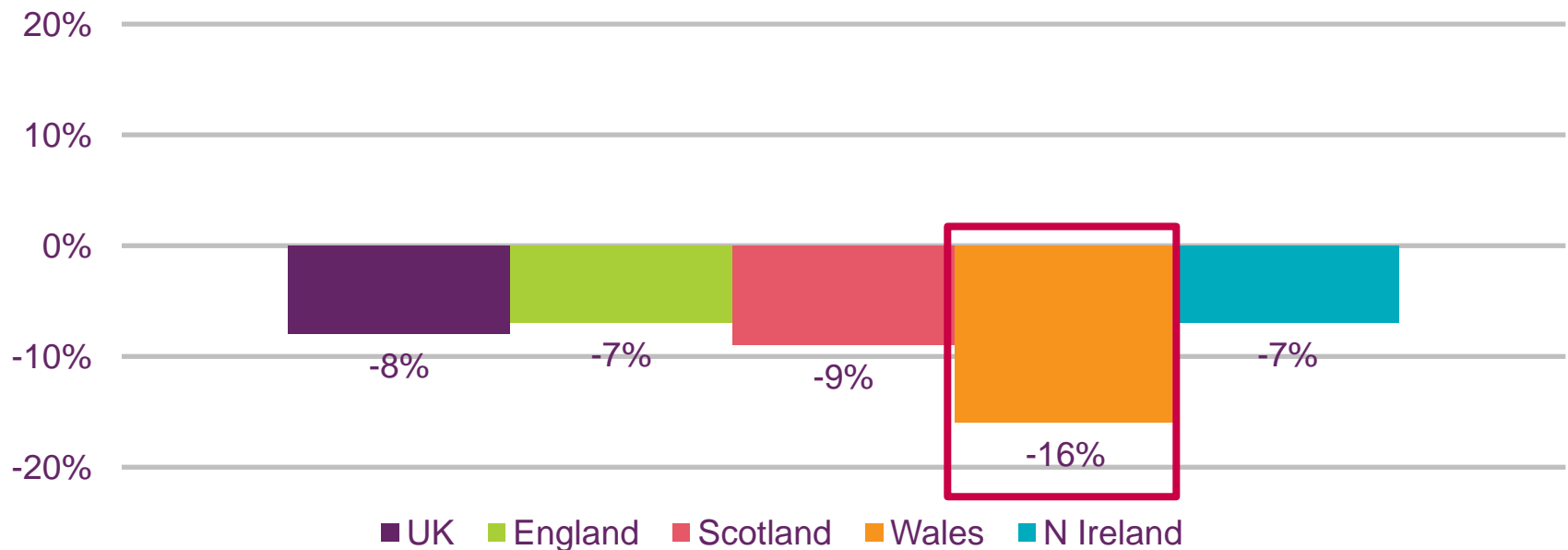
Base: All respondents (n = 3671 UK, 2109 England, 613 Scotland, 399 Wales, 550 N Ireland)

QC10: Compared with two years ago, would you say that the number of items you send through the post has...increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly?

Note: chart shows net percentage (% who claim their use has increased - % those who claim their use has decreased)

Figure 6.3

Net predicted change in the amount of post sent in the next two years



Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

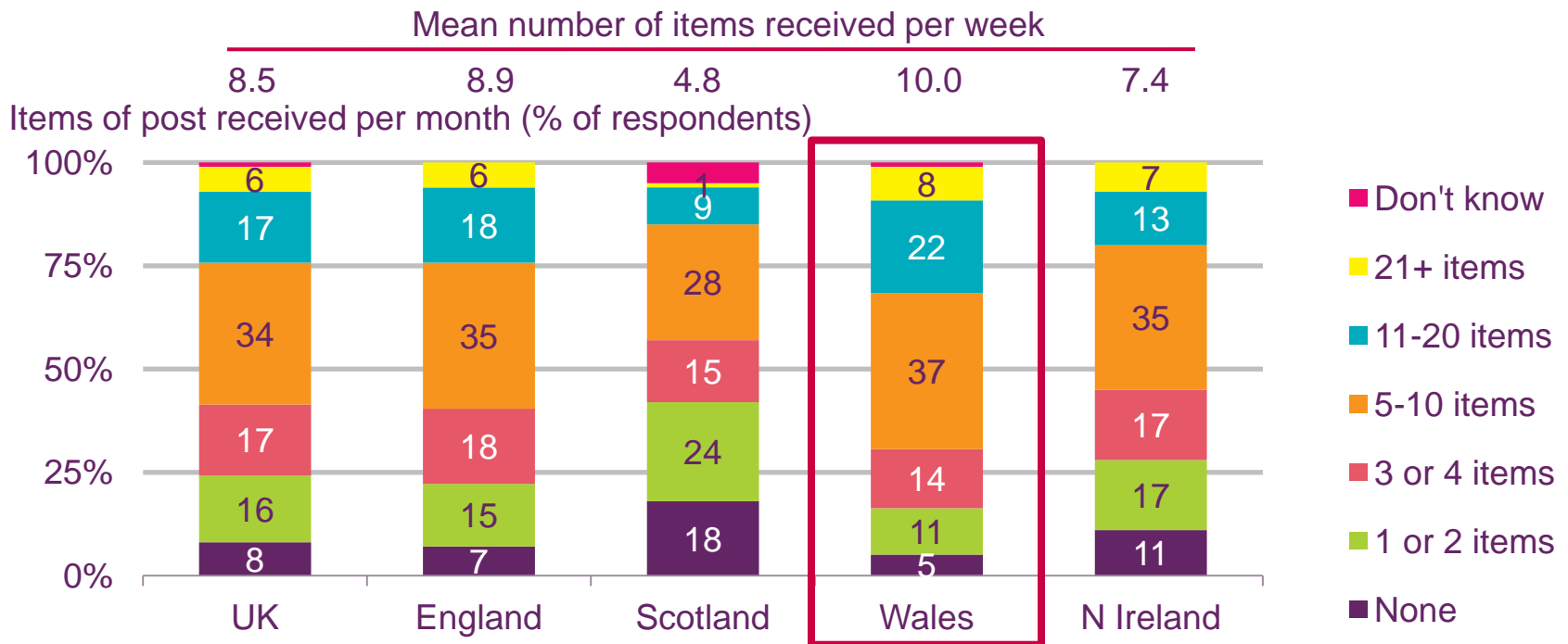
Base: All respondents (n = 3671 UK, 2109 England, 613 Scotland, 399 Wales, 550 N Ireland)

QC16: Looking to the future... Compared with now, would you say that the number of letters, cards and parcels you will be sending in the post two years from now will have.....increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly?

Note: chart shows net percentage (% who claim their use will increase - % those who claim their use will decrease)

Figure 6.4

Approximate number of items of post received in the past week



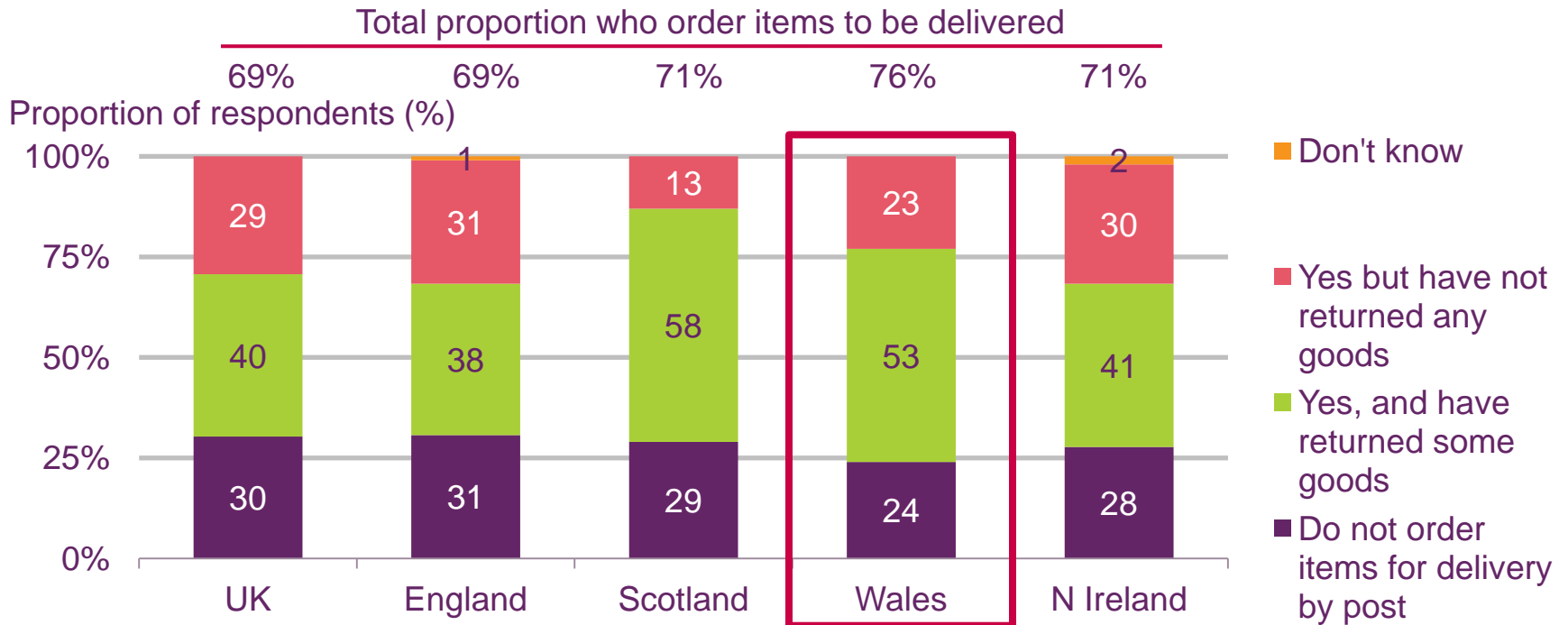
Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

Base: All adults aged 16+ (n = 3671 UK, 2109 England, 613 Scotland, 399 Wales, 550 Northern Ireland)

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

Figure 6.5

Proportion of consumers who have ordered items to be delivered through the post



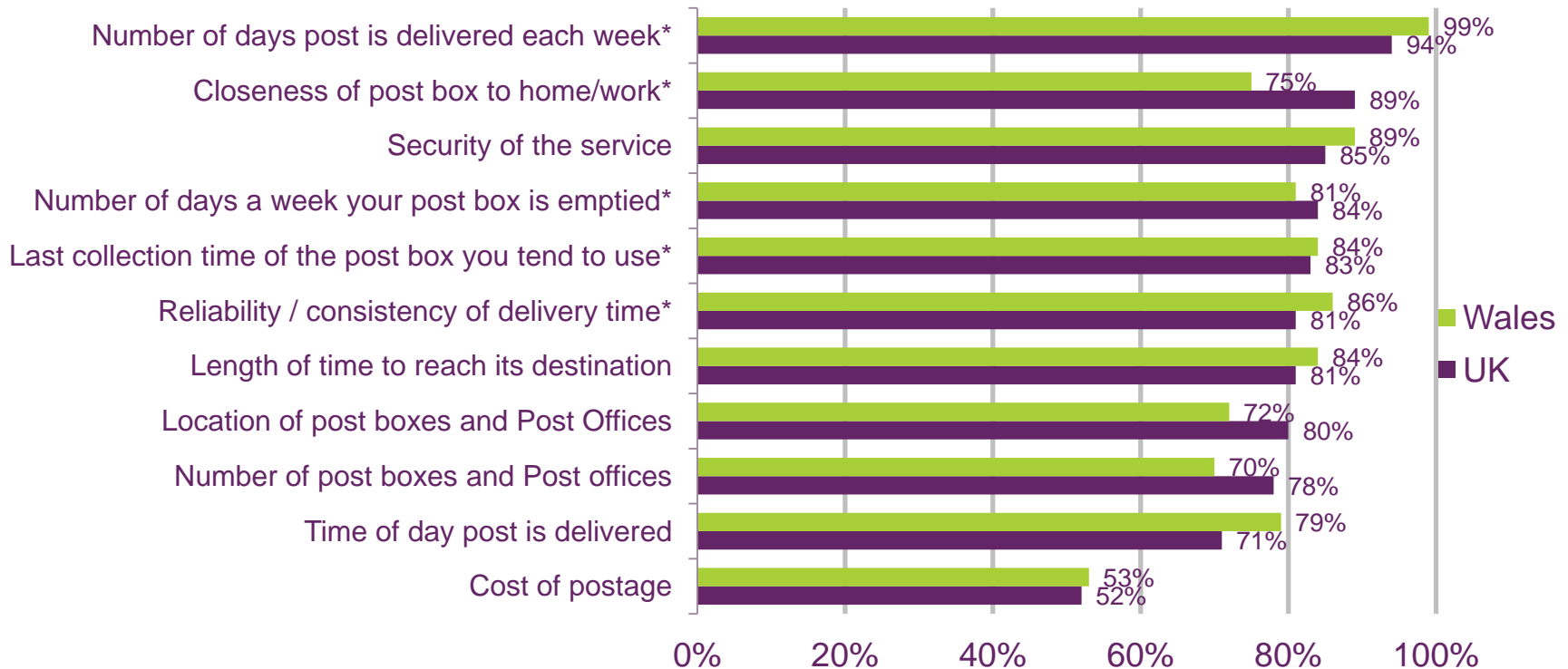
Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

Base: All respondents (n = 3671 UK, 2109 England, 613 Scotland, 399 Wales, 550 N Ireland)

QD8. Do you ever order items to be delivered to you through the post? IF YES Have you ever had to return any goods you bought which were delivered to you by post?

Figure 6.6

Satisfaction with aspects of Royal Mail's service



Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

Base: All respondents (n = 3671 UK, 550 N Ireland)

QE3A-K. SHOWCARD - SATISFACTION WITH ASPECTS OF ROYAL MAIL'S SERVICE

*Base: All respondents (from Q1 2013) (n = 1224 UK, 182 N Ireland)

Figure 6.7

Monthly spend on sending post

Monthly spend (% of respondents)



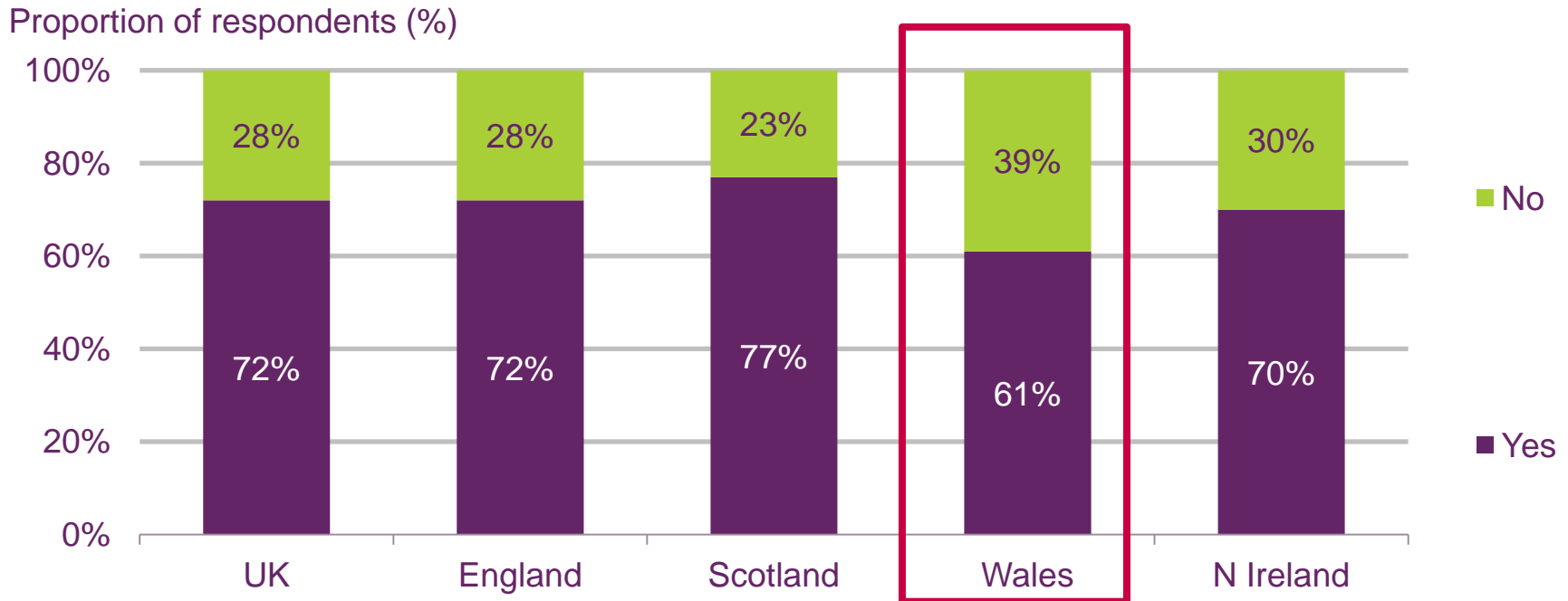
Source: Ofcom Business Postal Tracker, Q3 2012-Q1 2013

Base : All respondents (n = 1218 UK, 804 England, 144 Scotland, 134 Wales, 136 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.

Figure 6.8

Amount of businesses switching to other forms of communication over the past year



Source: Ofcom Business Postal Tracker, Q3 2012-Q1 2013

Base: All respondents (n = 1218 UK, 804 England, 144 Scotland, 134 Wales, 136 N Ireland)

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