

Significance Level: 95%
Total 1604 100.000% 100.0000.06234

Weighting matrix		
Achieved	Required Factor	
a	b	c

North 0-9 Employees	235 14.651	% 19.0000.08085
North 10+ Employees	85 5.299%	1.0000.01176
Mids 0-9 Employees	174 10.848	% 23.0000.13218
	a	
Mids 10+ Employees	49 3.055%	1.0000.02041
South 0-9 Employees	867 22.880	% 41.0000.11172
	a	
South 10+ Employees	113 7.045	% 1.0000.00885
	b	
Wal/Sco/Ni 0-9 Emplo	434 27.057	% 13.0000.02995
	b	
Wal/Sco/Ni 10+ Emplo	147 9.165	% 1.0000.00680
	b	

Columns Tested: a,b,c

C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Agriculture, hunting and
forestry

Fishing

Mining and quarrying

Manufacturing

Electricity / Gas /
Water supply

Construction

Wholesale and retail
trade: repair of motor
vehicles / motor cycles

Hotels and restaurants

Transportation storage
and communication

Financial intermediation
and insurance

Retail estate, rental
and business

Public administration
and defence

Educational services

Healthcare and social
work

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
	95	176	112	117	116	278	189	209	88	87	75	63	1379
33	4	2	-	3	4	2	*	5	1	2	5	5	20
2%	4%	1%	-%	2%	4%	1%	1%	2%	1%	2%	7%	8%	1%
	g				g						bcdgjmbcdgfhij	m	
*	-	-	-	-	-	-	-	-	-	-	-	*	-
1%	-%	-%	-%	-%	-%	-	-%	-%	-%	-%	-	1%	-%
5	-	-	-	-	-	-	2	2	-	*	-	*	4
1%	-%	-%	-%	-%	-%	-%	1%	1%	-%	1%	-%	1%	1%
283	17	22	9	12	27	59	43	45	26	9	9	6	259
18%	18%	13%	8%	10%	23%	21%	23%	21%	29%	10%	11%	9%	19%
					cdjkl	cdjkl	cdjkl	cdjkl	cdjklm				cdjkl
27	2	4	2	1	1	7	4	2	-	2	1	*	24
2%	2%	2%	2%	1%	1%	3%	2%	1%	-	2%	1%	1%	2%
285	20	27	17	21	30	60	26	39	13	13	10	10	252
18%	21%	15%	15%	18%	26%	22%	14%	19%	14%	15%	13%	15%	18%
					gijkl	k							
254	16	41	17	28	12	32	29	22	14	14	16	13	211
16%	17%	23%	15%	24%	11%	11%	15%	10%	16%	16%	21%	20%	15%
		efhm		efhm							efhm	efh	
22	*	-	2	3	1	*	*	6	-	5	2	2	12
1%	1%	-%	2%	2%	1%	1%	1%	3%	-%	6%	3%	3%	1%
				f				fm		abefgim	fm	fm	
41	6	5	-	1	1	9	4	8	-	3	2	2	34
3%	6%	3%	-%	1%	1%	3%	2%	4%	-%	4%	3%	2%	2%
	ci												
91	2	11	11	4	5	10	11	8	9	7	6	6	71
6%	2%	6%	10%	3%	4%	4%	6%	4%	11%	8%	8%	10%	5%
			f						adfm			adfm	
348	16	35	40	18	16	69	56	41	16	18	9	12	308
22%	17%	20%	36%	15%	14%	25%	30%	20%	18%	21%	12%	19%	22%
			abdehij klm			dek	dekl			k			ek
9	*	2	*	2	3	-	-	-	*	*	1	1	7
1%	1%	1%	1%	1%	2%	-%	-%	-%	1%	1%	1%	1%	1%
					fm								
8	*	-	-	2	-	4	-	1	-	1	1	*	6
1%	1%	-%	-%	1%	-%	1%	-%	1%	-%	1%	1%	1%	1%
17	-	*	*	3	-	4	4	2	*	1	2	2	13
1%	-%	1%	1%	3%	-%	1%	2%	1%	1%	1%	2%	2%	1%

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Table 1 (continuation)

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C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Other community, social
and personal service
activities

Private households with
employed persons

Engineering

Don't know

Other answers

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a 66	b 106	c 78	d 119	e 114	f 205	g 131	h 117	i 87	j 214	k 193	l 174	m 1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
133	7	24	13	13	11	13	7	20	3	7	11	4	112
8%	8%	14%	11%	11%	9%	5%	4%	10%	3%	8%	14%	6%	8%
		fgil	g	fgi							fgijlm		
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
44	6	3	2	4	4	9	2	6	5	2	1	-	41
3%	6%	2%	2%	3%	3%	3%	1%	3%	6%	2%	1%	-%	3%
	l			l	l	l		l	gkl	l			l
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
6	-	-	-	3	-	-	2	-	-	1	*	*	5
-%	-%	-%	-%	2%	-%	-%	1%	-%	-%	1%	1%	-%	-%
				fm									

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Table 1 (continuation)

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C1. To which industry does your organisation belong to?

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Agriculture, hunting and forestry	33 2%	31 2%	1 3%	* 3%	* 4%	- -%	1 2%	7 1%	25 5% a	32 2%	* 1%	20 2%	5 2%	5 5% a	2 2%
Fishing	* *%	- -%	* *%	- -%	- -%	- -%	* *%	- -%	* *%	* *%	- -%	- -%	* *%	- -%	- -%
Mining and quarrying	5 *%	5 *%	- -%	- -%	- -%	- -%	- -%	- -%	5 1% a	5 *%	- -%	2 *%	3 1%	- -%	- -%
Manufacturing	283 18%	266 17%	11 27% a	3 34% ad	1 15%	2 21%	17 26% a	199 17%	84 18%	275 18%	8 14%	163 15%	73 25% a	21 20%	26 27% a
Electricity / Gas / Water supply	27 2%	26 2%	* 1%	* 1%	- -%	- -%	* 1%	14 1%	13 3% a	27 2%	- -%	23 2%	4 1%	- -%	- -%
Construction	285 18%	276 18% ce	6 16% c	1 5%	2 23% ce	1 7%	9 14%	202 18%	83 18%	273 18%	12 19%	246 22% bcd	30 10% d	6 6%	3 3%
Wholesale and retail trade: repair of motor vehicles / motor cycles	254 16%	246 16%	4 11%	1 13%	* 7%	2 20%	8 12%	199 17% b	54 12%	240 16%	13 22%	159 14%	50 17%	21 20%	23 24% a
Hotels and restaurants	22 1%	21 1%	* 1%	* 1%	* 2%	* 3%	1 1%	11 1%	10 2% a	21 1%	1 1%	21 2% b	1 *%	* *%	- -%
Transportation storage and communication	41 3%	40 3%	1 2%	* 2%	* 6%	- -%	1 2%	25 2%	16 3%	41 3%	* *%	25 2%	10 3%	5 4%	2 2%
Financial intermediation and insurance	91 6%	87 6%	2 6%	* 3%	* 3%	* 4%	3 5%	66 6%	25 5%	89 6%	1 2%	48 4%	27 9% ad	13 12% ad	2 3%
Retail estate, rental and business	348 22%	338 22% bef	6 16%	2 20%	1 15%	1 10%	10 16%	267 23% b	81 17%	333 22%	15 25%	254 23%	59 20%	18 17%	17 18%
Public administration and defence	9 1%	7 *%	1 2%	* 5% a	* 4% a	* 4% a	2 3% a	6 1%	3 1%	9 1%	* 1%	7 1%	* *%	1 1%	1 1%
Educational services	8 *%	6 *%	1 3% a	- -%	* 2%	1 10% abctf	2 3% a	8 1%	* *%	7 *%	1 2%	7 1%	- -%	* *%	1 1% b
Healthcare and social work	17 1%	16 1%	1 2%	* 3%	* 3%	* 5% a	2 2% a	13 1%	4 1%	16 1%	1 2%	9 1%	2 1%	5 5% ab	2 2%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 1 (continuation)

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C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Other community, social
and personal service
activities

Private households with
employed persons

Engineering

Don't know

Other answers

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
133	127	3	1	1	1	6	92	41	127	6	100	17	6	11
8%	8%	6%	10%	13%	13%	9%	8%	9%	8%	10%	9%	6%	5%	11% b
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
44	42	1	-	*	*	2	26	18	43	1	25	10	4	4
3%	3%	3%	-%	5%	4%	3%	2%	4%	3%	2%	2%	3%	4%	5%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
6	6	*	-	-	-	*	5	1	6	*	6	-	*	-
1%	1%	1%	-%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	-%

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Table 1 (continuation)

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C1. To which industry does your organisation belong to?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Agriculture, hunting and forestry	33 2%	10 1%	5 2%	6 3%	8 4%	2 3%	* 1%	- -	28 2%	1 1%	* 1%	2 4%	1 5%	7 2%	- -%	5 3%	2 1%
Fishing	* %	- %	- %	- %	- %	* %	- %	- %	* %	- %	- %	- %	- %	- %	- %	- %	- %
Mining and quarrying	5 %	2 %	* %	2 1%	* %	- %	- %	- %	5 %	- %	- %	- %	- %	* %	- %	* %	- %
Manufacturing	283 18%	109 15%	71 23%	47 19%	36 17%	11 14%	7 24%	2 20%	232 16%	16 22%	19 45%	10 24%	5 16%	85 31%	41 33%	40 22%	86 39%
Electricity / Gas / Water supply	27 2%	14 2%	6 2%	6 2%	- -%	- -%	- -%	- -%	27 2%	- -%	- -%	- -%	- -%	2 1%	1 *	2 1%	1 *
Construction	285 18%	148 21%	64 20%	29 12%	39 18%	4 5%	2 6%	- -%	271 19%	9 11%	1 2%	2 5%	2 8%	15 6%	3 3%	15 8%	4 2%
Wholesale and retail trade: repair of motor vehicles / motor cycles	254 16%	113 16%	44 14%	37 15%	32 15%	24 31%	3 10%	* 1%	207 15%	18 24%	10 23%	8 19%	10 35%	48 17%	36 29%	28 16%	55 25%
Hotels and restaurants	22 1%	18 3%	2 1%	* %	1 %	* %	* %	- -%	22 2%	- -%	- -%	- -%	- -%	* %	- -%	* %	- -%
Transportation storage and communication	41 3%	11 2%	8 3%	8 3%	7 3%	4 6%	* 1%	2 18%	39 3%	* 1%	2 4%	* %	* 1%	8 3%	2 2%	6 4%	4 2%
Financial intermediation and insurance	91 6%	17 2%	14 4%	23 10%	25 11%	10 13%	2 7%	- -%	88 6%	3 4%	* %	* %	- -%	10 4%	- -%	9 5%	1 %
Retail estate, rental and business	348 22%	184 26%	47 15%	47 20%	46 21%	11 14%	11 40%	* 3%	309 22%	16 22%	9 21%	8 19%	6 19%	56 20%	22 18%	45 25%	33 15%
Public administration and defence	9 1%	1 %	1 %	4 2%	2 1%	2 2%	* %	* 1%	8 1%	* %	- -%	* 1%	* 1%	2 1%	1 1%	* %	3 1%
Educational services	8 %	6 1%	* %	* %	- -%	- -%	1 4%	* 1%	7 1%	* 1%	* %	* %	- -%	2 1%	* %	2 1%	* %

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Ofcom: Business Postal Tracker

Table 1 (continuation)

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C1. To which industry does your organisation belong to?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Healthcare and social work	17	4	2	4	5	1	*	-	9	2	1	3	2	4	2	3	4
	1%	1%	1%	2%	2%	2%	2%	-%	1%	3%	2%	8%	8%	2%	2%	2%	2%
					a					a		a	a				
Other community, social and personal service activities	133	66	32	16	11	3	1	3	120	6	1	6	*	17	9	14	13
	8%	9%	10%	7%	5%	4%	4%	35%	9%	8%	1%	15%	*%	6%	8%	8%	6%
		d	d									ce					
Private households with employed persons	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Engineering	44	13	13	8	5	4	*	2	36	4	-	2	2	17	5	8	13
	3%	2%	4%	3%	2%	5%	*%	18%	3%	5%	-%	5%	6%	6%	4%	5%	6%
			a														
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	6	2	2	2	*	*	-	-	6	-	-	-	-	*	-	*	-
	*%	*%	1%	1%	*%	*%	-%	-%	*%	-%	-%	-%	-%	*%	-%	*%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Ofcom: Business Postal Tracker

Table 1 (continuation)

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C1. To which industry does your organisation belong to?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Weighted total	1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
Agriculture, hunting and forestry	33	10	5	18	32	10	32	16	12	23	13	31	4	19	26
	2%	1%	2%	4%	2%	1%	2%	2%	3%	2%	2%	2%	2%	2%	2%
				a					b						
Fishing	*	-	-	*	*	*	*	-	-	*	-	*	*	-	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Mining and quarrying	5	2	-	3	5	4	5	3	2	5	3	5	2	5	5
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Manufacturing	283	154	47	80	263	141	263	170	75	229	146	263	53	198	204
	18%	19%	17%	16%	18%	16%	18%	23%	20%	18%	22%	18%	23%	17%	19%
					abcf						b		b		
Electricity / Gas / Water supply	27	18	4	5	26	14	26	7	3	26	8	26	*	24	21
	2%	2%	1%	1%	2%	2%	2%	1%	1%	2%	1%	2%	1%	2%	2%
											c				
Construction	285	155	43	85	265	160	269	72	52	253	73	264	12	212	176
	18%	19%	15%	17%	18%	18%	18%	10%	14%	20%	11%	18%	5%	18%	16%
					de	d	de		d	de	c	ac			
Wholesale and retail trade: repair of motor vehicles / motor cycles	254	113	48	88	229	120	235	147	71	187	107	231	36	168	170
	16%	14%	17%	18%	16%	13%	16%	20%	19%	15%	16%	16%	15%	14%	16%
					abcf			bf							
Hotels and restaurants	22	17	2	2	18	4	18	1	2	13	2	18	1	17	13
	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
		c		*	d	*	d	*		d	*	a			
Transportation storage and communication	41	23	7	12	39	22	41	14	16	38	11	41	2	31	31
	3%	3%	2%	2%	3%	2%	3%	2%	4%	3%	2%	3%	1%	3%	3%
								d							
Financial intermediation and insurance	91	19	32	40	91	81	91	33	16	79	39	86	9	81	69
	6%	2%	11%	8%	6%	9%	6%	4%	4%	6%	6%	6%	4%	7%	6%
			a	a	acdef										
Retail estate, rental and business	348	194	53	99	311	217	324	167	73	246	175	323	72	286	212
	22%	24%	19%	20%	21%	24%	22%	23%	19%	19%	26%	22%	31%	24%	20%
					ef						b		b	b	
Public administration and defence	9	7	1	2	7	8	9	3	2	8	3	9	3	7	7
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Educational services	8	5	2	1	8	7	8	3	3	4	3	6	2	5	5
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Healthcare and social work	17	5	4	8	16	12	16	11	7	13	12	16	5	12	16
	1%	1%	1%	2%	1%	1%	1%	1%	2%	1%	2%	1%	2%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 1 (continuation)

Page 9

C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Other community, social
and personal service
activities

Private households with
employed persons

Engineering

Don't know

Other answers

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Weighted total	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
Other community, social and personal service activities	133	65	38	122	75	122	51	38	104	49	117	22	91	80
	8%	8%	8%	8%	8%	8%	7%	10%	8%	7%	8%	9%	8%	7%
Private households with employed persons	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Engineering	44	20	15	39	24	39	32	7	36	25	37	9	31	35
	3%	2%	3%	3%	3%	3%	4%	2%	3%	4%	3%	4%	3%	3%
				abce										
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	6	4	2	6	4	6	2	3	4	1	6	*	5	5
	*%	1%	*%	*%	*%	*%	*%	1%	*%	*%	*%	*%	*%	*%

Ofcom: Business Postal Tracker

Table 1 (continuation)

Page 10

C1. To which industry does your organisation belong to?

Base: All respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Agriculture, hunting and forestry	33	5	2	22	33	30	33	28	33	-	19	33	8	1	8	23
	2%	2%	6%	2%	2%	2%	2%	2%	2%	-%	2%	2%	2%	1%	3%	2%
Fishing	*	-	-	*	*	*	*	*	*	-	*	*	*	-	-	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
Mining and quarrying	5	2	-	3	5	4	5	4	5	-	4	5	4	-	-	5
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
Manufacturing	283	46	9	223	274	229	275	228	277	2	162	276	66	20	42	219
	18%	18%	25%	17%	18%	17%	18%	19%	17%	100%	18%	18%	18%	14%	18%	18%
Electricity / Gas / Water supply	27	8	4	19	27	20	27	22	27	-	17	27	1	2	2	23
	2%	3%	10%	1%	2%	2%	2%	2%	2%	-%	2%	2%	1%	1%	1%	2%
			ac								c	c				
Construction	285	35	3	241	274	241	274	175	284	-	138	274	27	19	44	222
	18%	14%	9%	19%	18%	18%	17%	15%	18%	-%	15%	17%	8%	13%	18%	18%
				a	d	d	d	d	d		c	c				
Wholesale and retail trade: repair of motor vehicles / motor cycles	254	50	5	198	247	210	251	206	252	-	147	252	57	52	38	161
	16%	19%	13%	15%	16%	16%	16%	17%	16%	-%	16%	16%	16%	36%	16%	13%
														bc		
Hotels and restaurants	22	1	*	20	20	12	20	14	22	-	8	22	2	1	1	20
	1%	1%	1%	2%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	2%
Transportation storage and communication	41	9	*	32	41	32	41	32	41	-	24	40	8	2	5	34
	3%	3%	1%	3%	3%	2%	3%	3%	3%	-%	3%	3%	2%	2%	2%	3%
Financial intermediation and insurance	91	21	3	66	91	86	91	60	91	-	40	88	15	4	22	65
	6%	8%	7%	5%	6%	6%	6%	5%	6%	-%	4%	6%	4%	3%	9%	5%
		c													ac	
Retail estate, rental and business	348	50	6	286	334	299	335	259	348	-	210	341	113	28	40	279
	22%	19%	16%	22%	21%	22%	21%	22%	22%	-%	23%	22%	32%	19%	17%	23%
													ab			b
Public administration and defence	9	4	-	5	9	9	9	6	9	-	7	9	6	-	3	6
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	-%	1%	1%
													b			
Educational services	8	4	*	4	8	8	8	7	8	-	6	8	*	1	*	7
	1%	2%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
		c														
Healthcare and social work	17	3	*	14	17	12	17	12	17	-	12	17	5	3	3	12
	1%	1%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	2%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Other community, social
and personal service
activities

Private households with
employed persons

Engineering

Don't know

Other answers

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
276	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
133	10	4	113	131	111	132	102	130	-	66	128	31	7	18	108
8%	4%	10%	9%	8%	8%	8%	9%	8%	-%	7%	8%	9%	5%	8%	9%
			a												
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
44	11	-	33	43	39	43	41	44	-	32	44	14	6	13	26
3%	4%	-%	3%	3%	3%	3%	3%	3%	-%	4%	3%	4%	4%	5%	2%
														c	
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
6	1	-	4	6	2	6	3	6	-	2	6	*	1	*	5
%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%

Ofcom: Business Postal Tracker

Table 1 (continuation)

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C1. To which industry does your organisation belong to?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Agriculture, hunting and forestry	33	6	2	25	21	11	28	4	15	1	12	18	9	-
	2%	3%	2%	2%	2%	2%	2%	4%	1%	1%	3%	1%	2%	-%
Fishing	*	-	-	*	-	*	*	-	*	-	-	*	-	-
	*%	-%	-%	*%	-%	*%	*%	-%	*%	-%	-%	*%	-%	-%
Mining and quarrying	5	-	2	3	3	2	5	-	4	-	4	*	*	-
	*%	-%	2%	*%	*%	*%	*%	-%	*%	-%	1%	*%	*%	-%
Manufacturing	283	60	17	206	205	78	263	19	163	26	65	210	117	1
	18%	29%	16%	16%	19%	15%	18%	18%	16%	21%	17%	18%	31%	18%
Electricity / Gas / Water supply	27	2	2	23	18	9	25	2	22	1	4	22	2	-
	2%	1%	2%	2%	2%	2%	2%	2%	2%	*%	1%	2%	1%	-%
Construction	285	9	6	268	192	93	267	18	185	18	70	210	21	-
	18%	4%	6%	21%	18%	18%	18%	17%	18%	15%	18%	18%	5%	-%
Wholesale and retail trade: repair of motor vehicles / motor cycles	254	50	22	177	154	100	226	28	168	29	62	189	77	3
	16%	24%	22%	14%	14%	20%	15%	26%	16%	24%	16%	16%	20%	35%
Hotels and restaurants	22	-	*	21	12	9	13	9	15	3	2	19	*	-
	1%	-%	*%	2%	1%	2%	1%	8%	1%	2%	1%	2%	*%	-%
Transportation storage and communication	41	4	2	36	29	12	39	2	28	2	10	32	10	-
	3%	2%	2%	3%	3%	2%	3%	2%	3%	2%	2%	3%	3%	-%
Financial intermediation and insurance	91	8	4	77	71	20	90	*	62	5	23	65	10	-
	6%	4%	3%	6%	6%	4%	6%	*%	6%	4%	6%	6%	3%	-%
Retail estate, rental and business	348	30	29	287	237	111	337	10	227	27	86	254	73	2
	22%	15%	28%	22%	22%	22%	23%	10%	22%	22%	22%	22%	19%	22%
Public administration and defence	9	4	-	5	7	2	9	-	5	1	2	7	3	-
	1%	2%	-%	*%	1%	*%	1%	-%	*%	1%	1%	1%	1%	-%
Educational services	8	-	*	8	3	5	8	-	6	-	2	6	2	-
	*%	-%	*%	1%	*%	1%	1%	-%	1%	-%	*%	1%	1%	-%
Healthcare and social work	17	2	3	11	10	7	17	*	10	*	6	12	6	-
	1%	1%	3%	1%	1%	1%	1%	*%	1%	*%	1%	1%	2%	-%

 Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b
 Produced by OLR
 OFC1885
 Issue date: 03/07/13

c

Ofcom: Business Postal Tracker

Table 1 (continuation)

Page 13

C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Other community, social
and personal service
activities

Private households with
employed persons

Engineering

Don't know

Other answers

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
133	23	11	96	96	37	121	12	91	8	36	90	25	2
8%	11%	10%	8%	9%	7%	8%	11%	9%	7%	9%	8%	7%	22%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
44	7	4	33	34	10	42	2	31	1	9	35	19	-
3%	4%	4%	3%	3%	2%	3%	2%	3%	1%	2%	3%	5%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
6	-	*	6	3	4	6	-	6	-	*	6	-	*
1%	-%	1%	1%	1%	1%	1%	-%	1%	-%	1%	1%	-%	2%

Ofcom: Business Postal Tracker

Table 1 (continuation)

Page 14

C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

 Agriculture, hunting and
forestry

Fishing

Mining and quarrying

Manufacturing

 Electricity / Gas /
Water supply

Construction

 Wholesale and retail
trade: repair of motor
vehicles / motor cycles

Hotels and restaurants

 Transportation storage
and communication

 Financial intermediation
and insurance

 Retail estate, rental
and business

 Public administration
and defence

Educational services

 Healthcare and social
work

 Other community, social
and personal service
activities

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
33	12	4	12	5
2%	3%	1%	3%	1%
	b			
*	-	*	-	-
*%	-%	*%	-%	-%
5	2	*	2	*
*%	1%	*%	*%	*%
283	68	78	80	58
18%	17%	19%	19%	15%
27	4	5	5	13
2%	1%	1%	1%	3%
				ac
285	62	79	82	61
18%	16%	20%	20%	15%
254	32	68	56	97
16%	8%	17%	14%	24%
		a	a	abc
22	*	3	5	13
1%	*%	1%	1%	3%
			a	abc
41	9	14	11	8
3%	2%	3%	3%	2%
91	28	24	22	16
6%	7%	6%	5%	4%
348	104	78	95	71
22%	27%	19%	23%	18%
	bd			
9	7	1	1	-
1%	2%	*%	*%	-%
	bd			
8	4	2	1	2
*%	1%	*%	*%	*%
17	4	6	3	4
1%	1%	1%	1%	1%
133	42	25	21	46
8%	11%	6%	5%	12%
	bc			bc

Produced by OLR

OFC1885

Issue date: 03/07/13

C1. To which industry does your organisation belong to?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Private households with
employed persons

Engineering

Don't know

Other answers

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
-	-	-	-	-
-%	-%	-%	-%	-%
44	14	12	14	4
3%	4%	3%	3%	1%
	d		d	
-	-	-	-	-
-%	-%	-%	-%	-%
6	-	4	2	*
*%	-%	1%	*%	*%
		a		

Table 2

C2. Approximately how many people are employed by your whole organisation in the UK, including but not exclusively the branch or office location you currently work at?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Less than 10

10 - 49

50 - 99

100 - 249

250 - 499

500 - 999

1000 - 4999

5000 +

10+ employees

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1540	93	167	109	110	110	271	185	201	84	82	69	57	1331
96%	98%	95%	98%	94%	95%	97%	98%	97%	95%	95%	93%	91%	97%
			l			kl	kl	l					kl
39	1	4	2	3	4	4	3	5	3	3	3	4	29
2%	1%	2%	1%	3%	3%	1%	2%	2%	3%	4%	4%	6%	2%
												fm	
10	*	2	*	1	*	1	*	2	*	*	1	1	8
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
7	*	2	*	1	*	1	-	*	*	1	1	1	5
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
2	-	*	*	*	*	*	*	-	*	*	*	*	2
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
1	*	*	-	-	-	*	*	*	-	-	-	*	1
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
2	-	-	*	*	1	*	-	-	*	*	*	*	1
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
3	-	*	-	*	-	1	*	*	*	*	*	*	2
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
64	2	9	2	6	5	8	4	7	4	5	5	6	48
4%	2%	5%	2%	6%	5%	3%	2%	3%	5%	5%	7%	9%	3%
										fgm		cfghm	

C2. Approximately how many people are employed by your whole organisation in the UK, including but not exclusively the branch or office location you currently work at?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Less than 10

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1540	1540	-	-	-	-	-	1092	448	1495	45	1091	275	95	79
96%	100%	-%	-%	-%	-%	-%	96%	97%	97%	75%	98%	94%	91%	83%
	bcd	ef							b		bcd	d		
10 - 49	39	-	39	-	-	39	29	11	34	5	16	9	6	8
2%	-%	100%	-%	-%	-%	61%	3%	2%	2%	9%	1%	3%	5%	8%
		acde				acde			a		a	a		ab
50 - 99	10	-	10	-	-	10	7	3	9	1	2	3	2	3
1%	-%	-%	100%	-%	-%	15%	1%	1%	1%	1%	1%	1%	2%	3%
			abde			abde			a		a	a		a
100 - 249	7	-	-	7	-	7	6	1	5	2	1	3	1	3
1%	-%	-%	100%	-%	-%	11%	1%	1%	1%	3%	1%	1%	1%	3%
			abce			abce			a		a	a		a
250 - 499	2	-	-	-	2	2	2	*	*	2	1	*	1	1
1%	-%	-%	-%	-%	26%	3%	1%	1%	1%	3%	1%	1%	1%	1%
			abce		abce	ab			a		a	a		a
500 - 999	1	-	-	-	1	1	1	*	*	1	*	*	*	1
1%	-%	-%	-%	-%	16%	2%	1%	1%	1%	2%	1%	1%	1%	1%
			abce		abce	ab			a		a	a		a
1000 - 4999	2	-	-	-	2	2	2	*	1	1	1	*	-	1
1%	-%	-%	-%	-%	24%	3%	1%	1%	1%	2%	1%	1%	-%	1%
			abce		abce	ab			a		a	a		a
5000 +	3	-	-	-	3	3	2	*	*	2	2	*	*	*
1%	-%	-%	-%	-%	34%	4%	1%	1%	1%	4%	1%	1%	1%	1%
			abce		abce	ab			a		a	a		ab
10+ employees	64	-	39	10	7	64	49	16	49	15	22	16	10	16
4%	-%	100%	100%	100%	100%	100%	4%	3%	3%	25%	2%	6%	9%	17%
		a	a	a	a	a			a		a	a		ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

C2. Approximately how many people are employed by your whole organisation in the UK, including but not exclusively the branch or office location you currently work at?

Base: All respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	1604	620	306	220	247	120	78	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	1413	75	43	43	30	274	123	179	217
Less than 10	1540	711	299	231	204	67	19	1368	67	39	39	26	256	117	169	204
	96%	99%	96%	97%	94%	85%	66%	97%	90%	90%	92%	87%	94%	95%	94%	94%
		bcdef	ef	ef	ef	f		bcde								
10 - 49	39	6	8	4	8	8	5	30	4	2	2	2	10	4	5	8
	2%	1%	3%	2%	4%	10%	16%	2%	6%	4%	5%	5%	4%	3%	3%	4%
		a			a	abcd	abcd		a							
50 - 99	10	*	2	1	2	3	1	6	1	1	*	1	3	1	2	2
	1%	%	1%	%	1%	3%	4%	%	2%	2%	1%	3%	1%	1%	1%	1%
					a	abc	abc				a					
100 - 249	7	*	*	1	1	1	3	4	1	1	1	1	2	*	1	1
	%	%	%	%	1%	1%	10%	%	1%	2%	2%	2%	1%	%	1%	%
					a	abcde				a						
250 - 499	2	*	1	*	1	*	*	1	1	*	*	*	1	*	1	1
	%	%	%	%	%	%	-	%	1%	1%	-	1%	%	%	%	%
									a	a		a				
500 - 999	1	-	1	*	-	-	*	*	1	*	*	-	*	-	*	-
	%	-	%	%	-	-	2%	%	1%	%	%	-	%	-	%	-
							a		a							
1000 - 4999	2	*	*	*	*	*	*	2	-	*	-	*	*	-	*	*
	%	%	%	%	%	%	2%	%	-	%	-	%	%	-	%	%
							a									
5000 +	3	1	1	1	*	*	*	2	*	-	-	*	*	*	*	*
	%	%	%	%	%	%	1%	%	%	-	-	1%	%	%	%	%
10+ employees	64	8	13	8	13	12	10	45	8	4	4	4	17	6	11	12
	4%	1%	4%	3%	6%	15%	34%	3%	10%	10%	8%	13%	6%	5%	6%	6%
			a	a	a	abcd	abcde		a	a	a	a				

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

C2. Approximately how many people are employed by your whole organisation in the UK, including but not exclusively the branch or office location you currently work at?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Less than 10

10 - 49

50 - 99

100 - 249

250 - 499

500 - 999

1000 - 4999

5000 +

10+ employees

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
1540	786	265	476	1417	853	1442	689	350	1216	633	1419	213	1141	1026
96%	97% b	94%	96%	96% e	94%	96% e	94%	92%	96% e	95% c	96% c	91%	96% b	95% b
39	16	11	12	36	29	37	23	17	33	20	37	12	31	30
2%	2%	4%	2%	2%	3%	2%	3%	4%	3%	3%	2%	5%	3%	3%
								act				b		
10	4	2	3	9	9	10	7	6	9	7	10	4	9	9
1%	*%	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	2%	1%	1%
												b		
7	2	1	3	7	7	7	4	4	5	4	7	2	6	5
*%	*%	*%	1%	*%	1%	*%	1%	1%	*%	1%	*%	1%	1%	*%
2	1	1	1	2	2	2	2	1	1	2	2	1	2	1
*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
1	1	*	*	1	1	1	1	1	1	1	1	1	1	1
*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
2	1	*	1	2	2	2	1	1	1	1	2	*	2	1
*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
3	1	1	1	3	2	3	2	1	2	1	3	*	2	2
*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
64	25	17	22	61	52	62	40	30	53	36	61	21	52	50
4%	3%	6%	4%	4%	6%	4%	6%	6%	4%	5%	4%	9%	4%	5%
		a						act				ab		

Ofcom: Business Postal Tracker

Table 2 (continuation)

Page 20

C2. Approximately how many people are employed by your whole organisation in the UK, including but not exclusively the branch or office location you currently work at?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Less than 10

10 - 49

50 - 99

100 - 249

250 - 499

500 - 999

1000 - 4999

5000 +

10+ employees

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
276	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
261	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
1540	248	35	1237	1496	1286	1503	1149	1528	2	854	1504	336	139	230	1167
96%	95%	97%	96%	96%	96%	96%	96%	96%	100%	95%	96%	94%	95%	96%	96%
39	7	1	30	39	37	39	31	39	-	24	38	12	4	6	29
2%	3%	3%	2%	2%	3%	2%	3%	2%	-%	3%	2%	3%	3%	2%	2%
10	3	-	7	10	9	10	8	10	-	7	10	5	1	1	7
1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
7	1	*	6	7	7	7	6	7	-	5	7	2	2	1	4
1%	1%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
2	-	-	2	2	2	2	2	2	-	2	2	1	*	-	2
1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	1%
1	-	-	1	1	1	1	1	1	-	1	1	1	*	*	1
1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
2	*	-	2	2	2	2	1	2	-	1	2	*	*	*	2
1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
3	1	-	2	3	2	3	2	3	-	1	3	1	*	*	2
1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
64	12	1	50	64	59	64	52	64	-	42	63	22	7	9	47
4%	5%	3%	4%	4%	4%	4%	4%	4%	-%	5%	4%	6%	5%	4%	4%

C2. Approximately how many people are employed by your whole organisation in the UK, including but not exclusively the branch or office location you currently work at?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Less than 10

10 - 49

50 - 99

100 - 249

250 - 499

500 - 999

1000 - 4999

5000 +

10+ employees

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
1540	198	98	1232	1049	491	1434	106	996	117	377	1130	354	7
96%	96%	95%	96%	96%	96%	96%	99%	96%	95%	96%	96%	94%	93%
39	4	3	32	28	11	38	1	26	3	11	27	13	*
2%	2%	3%	2%	3%	2%	3%	1%	2%	3%	3%	2%	3%	3%
10	2	1	6	7	3	10	-	6	1	3	7	4	*
1%	1%	1%	1%	1%	1%	1%	-	1%	1%	1%	1%	1%	2%
7	1	1	5	5	2	7	-	4	2	2	5	2	-
1%	1%	1%	1%	1%	1%	1%	-	1%	1%	1%	1%	1%	-
2	*	*	2	2	1	2	*	1	*	1	1	2	*
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%
1	*	*	1	1	*	1	-	1	-	*	1	*	-
1%	1%	1%	1%	1%	1%	1%	-	1%	-	1%	1%	1%	-
2	*	*	2	1	1	2	-	2	*	*	2	*	-
1%	1%	1%	1%	1%	1%	1%	-	1%	1%	1%	1%	1%	-
3	-	-	2	2	1	3	-	2	-	*	2	1	-
1%	1%	1%	1%	1%	1%	1%	-	1%	-	1%	1%	1%	-
64	8	5	49	46	18	63	1	42	6	17	45	22	1
4%	4%	5%	4%	4%	4%	4%	1%	4%	5%	4%	4%	6%	7%

C2. Approximately how many people are employed by your whole organisation in the UK, including but not exclusively the branch or office location you currently work at?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Less than 10

10 - 49

50 - 99

100 - 249

250 - 499

500 - 999

1000 - 4999

5000 +

10+ employees

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1540	372	384	394	390
96%	95%	95%	96%	98%
				a
39	13	12	10	4
2%	3%	3%	3%	1%
	d	d		
10	3	2	3	1
1%	1%	1%	1%	*%
7	3	2	2	1
*%	1%	*%	*%	*%
2	*	1	*	*
*%	*%	*%	*%	*%
1	*	-	-	1
*%	*%	-%	-%	*%
2	-	1	1	1
*%	-%	*%	*%	*%
3	*	1	1	1
*%	*%	*%	*%	*%
64	20	19	16	9
4%	5%	5%	4%	2%
	d			

C3. Where in the UK do you work?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

East of England

East Midlands

Greater London

North East

North West

South East

South West

West Midlands

Yorkshire and The Humber

Scotland

Wales

Northern Ireland

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
95	100%	-	-	-	-	-	-	-	-	-	-	-	95
6%	bcddefgh ijklm	-	-	-	-	-	-	-	-	-	-	-	bcddefgh ijkl
176	-	100%	-	-	-	-	-	-	-	-	-	-	176
11%	-	acdefghi ijklm	-	-	-	-	-	-	-	-	-	-	acdefgh ijkl
112	-	-	100%	-	-	-	-	-	-	-	-	-	112
7%	-	-	abdefgh ijklm	-	-	-	-	-	-	-	-	-	abdefgh ijkl
117	-	-	-	100%	-	-	-	-	-	-	-	-	117
7%	-	-	-	abcefgghijk lm	-	-	-	-	-	-	-	-	abcefggh ijkl
116	-	-	-	-	100%	-	-	-	-	-	-	-	116
7%	-	-	-	-	abcefgghijk lm	-	-	-	-	-	-	-	abcefggh ijkl
278	-	-	-	-	-	100%	-	-	-	-	-	-	278
17%	-	-	-	-	-	abcefgghijk lm	-	-	-	-	-	-	abcefggh ijkl
189	-	-	-	-	-	-	100%	-	-	-	-	-	189
12%	-	-	-	-	-	-	abcefgghijk lm	-	-	-	-	-	abcefggh ijkl
209	-	-	-	-	-	-	-	100%	-	-	-	-	209
13%	-	-	-	-	-	-	-	abcefgghijk lm	-	-	-	-	abcefggh ijkl
88	-	-	-	-	-	-	-	-	100%	-	-	-	88
6%	-	-	-	-	-	-	-	-	abcefgghijk lm	-	-	-	abcefggh ijkl
87	-	-	-	-	-	-	-	-	-	100%	-	-	87
5%	-	-	-	-	-	-	-	-	-	abcefgghijk lm	-	-	abcefggh ijkl
75	-	-	-	-	-	-	-	-	-	-	100%	-	75
5%	-	-	-	-	-	-	-	-	-	-	abcefgghijk lm	-	abcefggh ijkl
63	-	-	-	-	-	-	-	-	-	-	-	100%	63
4%	-	-	-	-	-	-	-	-	-	-	-	abcefgghijk lm	abcefggh ijkl

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Table 3 (continuation)

Page 24

C3. Where in the UK do you work?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

England

North

Mids

South

Urban

Rural

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1379	95	176	112	117	116	278	189	209	88	87	75	63	1379
86%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-%	-%	-%	100%
	jkl	jkl	jkl	jkl	jkl	jkl	jkl	jkl	jkl				jkl
321	-	-	-	117	116	-	-	-	88	-	-	-	321
20%	-%	-%	-%	100%	100%	-%	-%	-%	100%	-%	-%	-%	23%
				abcdefghijklm					abcdefghijklm				abcdefghijkl
480	95	176	-	-	-	-	-	209	-	-	-	-	480
30%	100%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	35%
	cdefgijcddefgijk							cdefgijk					cdefgij
579	-	-	112	-	-	278	189	-	-	-	-	-	579
36%	-%	-%	100%	-%	-%	100%	100%	-%	-%	-%	-%	-%	42%
			abdehij			abdehijklmabdehijklm							abdehij
1141	46	140	112	93	84	197	132	136	79	52	38	31	1020
71%	48%	80%	100%	79%	73%	71%	70%	65%	90%	60%	51%	49%	74%
		ahjklabdefgh		ahjkl	ajkl	ajkl	akl	aklaefghijklm		l			ahjkl
463	49	36	-	24	32	81	56	72	9	35	37	32	360
29%	52%	20%	-%	21%	27%	29%	30%	35%	10%	40%	49%	51%	26%
	bcddefgh	c		c	ci	ci	ci	bcdim	c	bcdefim	bcdefghimbcdefghi	jm	ci
	im												

C3. Where in the UK do you work?

Base: All respondents

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
95	93	1	*	*	*	2	46	49	95	*	71	18	2	4
6%	6%	3%	1%	6%	2%	3%	4%	11%	6%	1%	6%	6%	2%	4%
	f						a	b	c					
176	167	4	2	2	1	9	140	36	167	9	128	31	8	9
11%	11%	11%	17%	28%	12%	14%	12%	8%	11%	15%	12%	11%	8%	9%
			abf				b							
112	109	2	*	*	*	2	112	-	106	6	76	17	13	6
7%	7%	4%	4%	2%	3%	4%	10%	-%	7%	10%	7%	6%	12%	6%
	f						b						ab	
117	110	3	1	1	1	6	93	24	111	6	85	21	7	3
7%	7%	8%	14%	13%	11%	10%	8%	5%	7%	9%	8%	7%	7%	3%
							b				d			
116	110	4	*	*	1	5	84	32	113	2	88	18	3	7
7%	7%	10%	4%	5%	11%	9%	7%	7%	7%	4%	8%	6%	3%	7%
											c			
278	271	4	1	1	1	8	197	81	270	9	178	56	23	21
17%	18%	11%	15%	10%	12%		17%	17%	17%	14%	16%	19%	22%	22%
	bf													
189	185	3	*	-	*	4	132	56	178	10	128	37	11	13
12%	12%	8%	4%	-%	5%	6%	12%	12%	12%	17%	11%	13%	11%	14%
	df													
209	201	5	2	*	1	7	136	72	204	5	137	40	17	15
13%	13%	12%	17%	5%	8%	11%	12%	16%	13%	8%	12%	14%	16%	16%
							a							
88	84	3	*	*	*	4	79	9	85	4	59	16	8	6
6%	5%	8%	4%	5%	5%	6%	7%	2%	5%	6%	5%	5%	8%	6%
							b							
87	82	3	*	1	1	5	52	35	83	3	62	16	5	4
5%	5%	8%	5%	9%	7%	7%	5%	7%	5%	6%	6%	6%	5%	4%
							a							
75	69	3	1	1	1	5	38	37	72	3	57	10	4	3
5%	4%	8%	9%	9%	8%	8%	3%	8%	5%	5%	5%	3%	4%	4%
		a			a	a		a						
63	57	4	1	1	1	6	31	32	61	2	44	11	4	5
4%	4%	10%	6%	8%	12%	9%	3%	7%	4%	4%	4%	4%	4%	5%
	a			a	a	a		a						
1379	1331	29	8	5	6	48	1020	360	1329	50	950	254	92	83
86%	86%	74%	81%	74%	74%	75%	89%	78%	86%	85%	85%	87%	88%	87%
	bdef						b							
321	305	10	2	2	2	16	256	65	309	12	233	54	18	15
20%	20%	26%	22%	24%	27%	25%	22%	14%	20%	19%	21%	19%	17%	16%
	a				a	a	b							
480	462	10	3	3	2	18	323	158	466	14	336	90	27	28
30%	30%	26%	36%	38%	21%	28%	28%	34%	30%	24%	30%	31%	26%	29%
							a							
579	564	9	2	1	2	14	441	137	554	25	381	110	47	40
36%	37%	23%	24%	12%	25%	22%	39%	30%	36%	41%	34%	38%	45%	42%

C3. Where in the UK do you work?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Urban

Rural

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Urban	1141	1092	29	7	6	7	1141	-	1088	53	775	219	82	65
71%	71%	73%	73%	81%	87%	76%	100%	-%	70%	89%	70%	75%	78%	69%
					ab		b			a				
463	448	11	3	1	1	16	-	463	456	7	338	72	23	30
29%	29%	27%	27%	19%	13%	24%	-%	100%	30%	11%	30%	25%	22%	31%
	e	e						a		b				

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Table 3 (continuation)

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C3. Where in the UK do you work?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
East of England	95 6%	47 7%	20 6%	11 5%	9 4%	6 7%	* 1%	2 20%	85 6%	4 5%	4 9%	2 5%	- -%	20 7%	6 5%	17 9%	9 4%
East Midlands	176 11%	77 11%	43 14%	20 9%	20 9%	13 16%	3 12%	* 3%	159 11%	7 10%	1 2%	5 11%	5 15%	38 14%	12 10%	29 16%	21 10%
Greater London	112 7%	61 8%	24 8%	13 5%	10 5%	2 3%	- -%	2 20%	102 7%	4 5%	2 5%	4 9%	* *%	15 5%	15 12%	9 5%	20 9%
North East	117 7%	52 7%	22 7%	22 9%	13 6%	5 6%	2 8%	* 2%	106 7%	4 6%	1 1%	4 10%	2 6%	17 6%	8 7%	11 6%	14 7%
North West	116 7%	49 7%	22 7%	19 8%	18 8%	3 4%	4 12%	1 13%	107 8%	* *%	5 12%	1 1%	3 11%	19 7%	12 10%	15 8%	17 8%
South East	278 17%	112 16%	52 17%	53 22%	43 20%	12 15%	5 16%	2 18%	240 17%	10 14%	9 21%	13 30%	6 21%	58 21%	21 17%	28 16%	50 23%
South West	189 12%	79 11%	35 11%	29 12%	33 15%	6 7%	4 15%	2 18%	161 11%	16 22%	6 13%	4 8%	2 8%	30 11%	13 10%	26 15%	17 8%
West Midlands	209 13%	104 14%	33 11%	28 12%	29 13%	12 16%	2 6%	- -%	177 12%	14 19%	5 11%	6 15%	7 24%	31 11%	18 14%	11 6%	38 17%
Yorkshire and The Humber	88 6%	32 4%	20 6%	19 8%	10 5%	8 10%	1 2%	- -%	76 5%	5 7%	6 13%	* 1%	1 4%	16 6%	8 7%	10 5%	14 6%
Scotland	87 5%	42 6%	16 5%	8 3%	14 6%	4 6%	3 9%	* 3%	78 6%	5 7%	2 4%	1 3%	1 2%	11 4%	5 4%	9 5%	8 4%
Wales	75 5%	40 6%	14 4%	9 4%	8 4%	3 4%	2 5%	* 1%	68 5%	3 3%	1 1%	2 4%	1 5%	11 4%	4 3%	8 4%	7 3%
Northern Ireland	63 4%	23 3%	12 4%	9 4%	11 5%	4 5%	4 14%	- -%	56 4%	2 2%	3 7%	1 3%	1 4%	7 2%	2 2%	6 4%	2 1%
England	1379 86%	614 85%	271 87%	213 89%	185 85%	67 85%	21 72%	9 96%	1212 86%	65 87%	38 88%	38 89%	26 89%	244 89%	112 91%	157 87%	199 92%
North	321 20%	133 18%	64 21%	59 25%	41 19%	16 20%	6 22%	1 15%	288 20%	9 13%	12 27%	5 13%	6 21%	52 19%	28 23%	36 20%	44 20%
Mids	480 30%	229 32%	96 31%	60 25%	58 27%	31 39%	5 19%	2 23%	421 30%	25 34%	9 21%	13 30%	12 39%	90 33%	35 29%	57 32%	68 31%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

C3. Where in the UK do you work?

Base: All respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%	a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	1413	75	43	43	30	274	123	179	217
South	579	252	111	95	86	20	9	502	30	17	20	9	103	48	64	87
	36%	35%	36%	40%	39%	26%	31%	36%	41%	40%	47%	29%	37%	39%	36%	40%
	e	e	e	e	e											
Urban	1141	507	222	166	161	57	23	1003	58	37	27	16	206	95	131	170
	71%	70%	71%	69%	74%	72%	81%	71%	78%	85%	63%	53%	75%	77%	73%	78%
							ac	e	e	ade						
Rural	463	212	90	73	57	22	5	411	17	6	16	14	67	28	48	47
	29%	30%	29%	31%	26%	28%	19%	29%	22%	15%	37%	47%	25%	23%	27%	22%
	f	f	f	f				c			c	abc				

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 3 (continuation)

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C3. Where in the UK do you work?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

East of England

East Midlands

Greater London

North East

North West

South East

South West

West Midlands

Yorkshire and The Humber

Scotland

Wales

Northern Ireland

England

North

Mids

South

Urban

Rural

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
95	54	24	17	88	59	90	34	16	70	30	90	11	66	69
6%	7%	8%	3%	6%	7%	6%	5%	4%	6%	4%	6%	5%	6%	6%
	c	c												
176	92	25	59	159	107	161	86	42	134	83	159	25	115	118
11%	11%	9%	12%	11%	12%	11%	12%	11%	11%	12%	11%	11%	10%	11%
112	58	20	31	103	72	106	61	27	88	54	105	22	95	73
7%	7%	7%	6%	7%	8%	7%	8%	7%	7%	8%	7%	10%	8%	7%
117	58	16	43	106	65	109	49	29	87	44	110	17	95	83
7%	7%	6%	9%	7%	7%	7%	7%	8%	7%	7%	7%	7%	8%	8%
116	59	25	31	109	54	110	42	22	87	47	108	12	81	70
7%	7%	9%	6%	7%	6%	7%	6%	6%	7%	7%	7%	5%	7%	7%
278	140	48	87	255	173	256	134	68	222	121	246	47	214	186
17%	17%	17%	17%	17%	19%	17%	18%	18%	17%	18%	17%	20%	18%	17%
189	94	39	55	176	107	179	94	42	154	74	178	23	143	118
12%	12%	14%	11%	12%	12%	12%	13%	11%	12%	11%	12%	10%	12%	11%
209	100	33	74	194	103	200	94	56	183	91	198	26	155	144
13%	12%	12%	15%	13%	11%	13%	13%	15%	14%	14%	13%	11%	13%	13%
									b					
88	38	21	27	84	52	84	46	24	74	41	83	11	68	60
6%	5%	7%	5%	6%	6%	6%	6%	6%	6%	6%	6%	5%	6%	6%
87	48	13	25	78	47	80	42	22	69	33	80	8	61	62
5%	6%	5%	5%	5%	5%	5%	6%	6%	5%	5%	5%	4%	5%	6%
75	40	10	23	67	33	67	26	16	55	28	66	8	54	44
5%	5%	3%	5%	5%	4%	4%	4%	4%	4%	4%	4%	3%	5%	4%
63	29	8	25	60	32	60	22	15	47	23	59	22	45	48
4%	4%	3%	5%	4%	4%	4%	3%	4%	4%	3%	4%	9%	4%	4%
												ab		
1379	693	250	424	1273	792	1297	640	327	1099	584	1275	196	1032	922
86%	85%	89%	85%	86%	88%	86%	88%	86%	87%	87%	86%	84%	86%	86%
321	155	61	101	299	171	303	137	75	249	132	300	41	244	213
20%	19%	22%	20%	20%	19%	20%	19%	20%	20%	20%	20%	17%	20%	20%
480	246	81	150	441	269	451	214	114	387	204	447	63	336	332
30%	30%	29%	30%	30%	30%	30%	29%	30%	30%	30%	30%	27%	28%	31%
579	292	108	173	533	352	542	289	137	463	249	528	92	452	377
36%	36%	38%	35%	36%	39%	36%	40%	36%	37%	37%	36%	40%	38%	35%
1141	583	205	341	1048	651	1069	536	262	895	502	1053	176	864	737
71%	72%	73%	69%	71%	72%	71%	74%	69%	71%	75%	71%	75%	72%	69%
													b	
463	228	76	156	430	253	435	193	118	374	167	428	58	329	339
29%	28%	27%	31%	29%	28%	29%	26%	31%	29%	25%	29%	25%	28%	31%
													a	

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Table 3 (continuation)

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C3. Where in the UK do you work?

Base: All respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
East of England	95 6%	20 8%	2 5%	75 6%	92 6%	72 5%	92 6%	68 6%	93 6%	- -%	49 6%	92 6%	17 5%	7 5%	18 8%	70 6%
East Midlands	176 11%	31 12%	4 1%	137 11%	172 11%	145 11%	174 11%	140 12%	172 11%	- -%	107 12%	174 11%	36 10%	24 17%	25 10%	127 10%
Greater London	112 7%	17 6%	- -%	93 7%	112 7%	99 7%	112 7%	82 7%	112 7%	- -%	63 7%	110 7%	33 9%	9 6%	15 6%	86 7%
North East	117 7%	16 6%	1 4%	97 8%	110 7%	101 7%	113 7%	86 7%	115 7%	- -%	71 8%	114 7%	30 8%	11 8%	16 7%	89 7%
North West	116 7%	23 9%	7 19% c	84 7%	113 7%	95 7%	114 7%	77 6%	116 7%	- -%	64 7%	113 7%	26 7%	8 6%	20 9%	86 7%
South East	278 17%	53 20%	5 15%	217 17%	267 17%	236 18%	267 17%	209 17%	276 17%	2 100%	170 19%	273 17%	72 20%	28 19%	52 22% c	198 16%
South West	189 12%	23 9%	4 10%	161 12%	185 12%	156 12%	185 12%	145 12%	187 12%	- -%	99 11%	183 12%	41 11%	15 10%	22 9%	152 12%
West Midlands	209 13%	28 11%	6 18%	172 13%	202 13%	181 13%	202 13%	152 13%	209 13%	- -%	101 11%	202 13% c	32 9%	11 7%	24 10%	174 14% a
Yorkshire and The Humber	88 6%	10 4%	1 4%	76 6%	86 6%	73 5%	86 5%	71 6%	88 6%	- -%	50 6%	87 6%	14 4%	9 6%	15 6%	64 5%
Scotland	87 5%	16 6%	1 4%	67 5%	85 5%	73 5%	86 5%	68 6%	87 5%	- -%	51 6%	86 6%	19 5%	8 6%	17 7%	62 5%
Wales	75 5%	15 6%	2 4%	57 4%	74 5%	62 5%	74 5%	56 5%	74 5%	- -%	37 4%	72 5%	13 4%	10 7%	7 3%	56 5%
Northern Ireland	63 4%	11 4%	2 5%	50 4%	62 4%	53 4%	62 4%	46 4%	63 4%	- -%	34 4%	62 4%	25 7% ab	4 2%	9 4%	51 4%
England	1379 86%	219 84%	31 87%	1112 86%	1339 86%	1157 86%	1345 86%	1031 86%	1369 86%	2 100%	774 86%	1348 86%	301 84%	124 85%	207 86%	1046 86%
North	321 20%	48 18%	10 27%	257 20%	309 20%	268 20%	313 20%	234 19%	320 20%	- -%	185 21%	314 20%	70 20%	29 20%	52 22%	239 20%
Mids	480 30%	79 30%	13 35%	384 30%	466 30%	398 30%	468 30%	360 30%	474 30%	- -%	257 29%	468 30% c	84 24%	42 29%	66 28%	371 31%
South	579 36%	92 35%	9 25%	471 37%	564 36%	492 37%	564 36%	436 36%	575 36%	2 100%	332 37%	566 36%	146 41%	52 36%	89 37%	436 36%
Urban	1141 71%	171 66%	22 61%	930 72% a	1113 71%	970 72%	1118 71%	851 71%	1130 71%	2 100%	640 71%	1122 72%	256 72%	111 76%	165 69%	862 71%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

C3. Where in the UK do you work?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Rural

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
276	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
261	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
463	89	14	356	447	376	448	350	463	-	256	445	102	35	75	353
29%	34%	39%	28%	29%	28%	29%	29%	29%	-%	29%	28%	28%	24%	31%	29%
	c														

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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C3. Where in the UK do you work?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
		a	b	c	a	b	a	b	a	b	a	b	a	b
Significance Level: 95%	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Unweighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Weighted total														
East of England	95	13	9	73	64	31	93	2	62	11	25	70	26	-
	6%	6%	9%	6%	6%	6%	6%	2%	6%	9%	6%	6%	7%	-%
East Midlands	176	23	12	137	110	67	166	11	118	14	51	120	52	-
	11%	11%	11%	11%	10%	13%	11%	10%	11%	11%	13%	10%	14%	-%
Greater London	112	9	4	97	72	40	106	5	66	16	33	77	28	2
	7%	4%	4%	8%	7%	8%	7%	5%	6%	13% a	8%	7%	7%	22%
North East	117	19	6	92	74	43	107	9	73	14	20	94	25	1
	7%	9%	5%	7%	7%	8%	7%	9%	7%	11%	5%	8%	7%	18%
North West	116	21	3	92	83	32	108	8	61	7	23	86	31	1
	7%	10% b	3%	7%	8%	6%	7%	7%	6%	6%	6%	7%	8%	16%
South East	278	39	17	219	202	76	260	18	183	17	55	218	71	*
	17%	19%	16%	17%	18%	15%	17%	17%	18%	13%	14%	19% a	19%	2%
South West	189	14	16	158	125	63	179	9	115	13	59	126	42	*
	12%	7%	16% a	12% a	11%	12%	12%	8%	11%	10%	15% b	11%	11%	2%
West Midlands	209	29	22	158	156	53	198	11	136	11	48	156	38	2
	13%	14%	21% c	12%	14% b	10%	13%	10%	13%	9%	12%	13%	10%	26%
Yorkshire and The Humber	88	21	5	62	62	26	79	9	62	7	32	55	25	-
	6%	10% c	5%	5%	6%	5%	5%	8%	6%	6%	8% b	5%	7%	-%
Scotland	87	6	6	74	60	27	80	7	61	6	19	65	16	1
	5%	3%	6%	6%	6%	5%	5%	6%	6%	4%	5%	6%	4%	7%
Wales	75	9	3	63	45	30	64	11	53	4	16	57	13	*
	5%	4%	3%	5%	4%	6%	4%	10% a	5%	3%	4%	5%	4%	6%
Northern Ireland	63	3	1	58	42	21	55	8	46	4	12	51	8	-
	4%	1%	1%	5% a	4%	4%	4%	7%	4%	3%	3%	4%	2%	-%
England	1379	188	94	1087	948	431	1297	82	877	110	348	1002	339	7
	86%	91% c	90%	85%	87%	85%	87% b	77%	84%	89%	88%	85%	90%	87%
North	321	61	14	245	219	101	294	26	196	28	76	234	81	3
	20%	30% bc	13%	19%	20%	20%	20%	25%	19%	23%	19%	20%	22%	35%
Mids	480	64	43	369	330	150	457	23	316	36	125	346	116	2
	30%	31% c	41%	29%	30%	30%	31%	22%	30%	29%	32%	29%	31%	26%
South	579	63	37	473	399	179	546	32	365	46	148	421	141	2
	36%	31%	36%	37%	36%	35%	36%	30%	35%	37%	37%	36%	37%	26%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

C3. Where in the UK do you work?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Urban

Rural

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
1141	155	75	900	762	379	1072	69	723	94	298	817	282	4
71%	75%	73%	70%	70%	74% a	72%	65%	70%	76%	75% b	70%	75%	52%
463	51	28	382	333	130	425	38	314	29	97	357	94	4
29%	25%	27%	30%	30% b	26%	28%	35%	30%	24%	25% a	30%	25%	48%

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C3. Where in the UK do you work?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

East of England

East Midlands

Greater London

North East

North West

South East

South West

West Midlands

Yorkshire and The Humber

Scotland

Wales

Northern Ireland

England

North

Mids

South

Urban

Rural

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
95	24	18	22	31
6%	6%	5%	5%	8%
176	40	48	43	45
11%	10%	12%	11%	11%
112	23	24	31	34
7%	6%	6%	7%	9%
117	41	22	31	23
7%	10%	5%	8%	6%
	bd			
116	25	26	43	22
7%	6%	6%	10%	5%
		abd		
278	68	90	63	57
17%	17%	22%	15%	14%
		cd		
189	54	53	42	40
12%	14%	13%	10%	10%
209	44	48	63	53
13%	11%	12%	15%	13%
88	27	24	17	21
6%	7%	6%	4%	5%
87	21	21	13	31
5%	5%	5%	3%	8%
				c
75	14	14	20	26
5%	4%	4%	5%	7%
63	12	14	21	17
4%	3%	4%	5%	4%
1379	345	354	356	325
86%	88%	88%	87%	81%
	d	d	d	
321	92	72	92	65
20%	24%	18%	22%	16%
	bd		d	
480	108	115	128	129
30%	28%	29%	31%	32%
579	145	167	136	131
36%	37%	41%	33%	33%
		cd		
1141	282	297	259	302
71%	72%	74%	63%	76%
	c	c		c
463	110	106	151	97
29%	28%	26%	37%	24%
		abd		

Produced by OLR

OFC1885

Issue date: 03/07/13

C4. Is your location the headquarters or a local branch / office?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Head office
Branch / local office
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1545	95	167	106	111	113	270	178	204	85	83	72	61	1329
96%	100%	95%	95%	95%	98%	97%	95%	98%	96%	96%	96%	96%	96%
59	*	9	6	6	2	9	10	5	4	3	3	2	50
4%	100%	95%	95%	95%	98%	97%	95%	98%	96%	96%	96%	96%	96%

C4. Is your location the headquarters or a local branch / office?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Head office

Branch / local office

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1545	1495	34	9	5	2	49	1088	456	1545	-	1078	276	102	89
96%	97%	87%	92%	71%	19%	77%	95%	99%	100%	-%	97%	95%	97%	94%
	bcd ef	def	def	e		e		a	b					
59	45	5	1	2	7	15	53	7	-	59	35	15	3	6
4%	3%	13%	8%	29%	81%	23%	5%	1%	-%	100%	3%	5%	3%	6%
		a	a	abc	abcd f	abc	b		a					

C4. Is your location the headquarters or a local branch / office?

Base: All respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%	a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	1413	75	43	43	30	274	123	179	217
Head office	1545	692	300	233	209	75	27	1365	69	41	42	28	261	119	172	209
	96%	96%	96%	97%	96%	96%	93%	97%	92%	94%	98%	96%	96%	97%	96%	96%
Branch / local office	59	27	12	6	9	3	2	49	6	3	1	1	12	4	8	8
	4%	4%	4%	3%	4%	4%	7%	3%	8%	6%	2%	4%	4%	3%	4%	4%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

C4. Is your location the headquarters or a local branch / office?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Head office

Branch / local office

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
1545	786	274	472	1421	866	1445	695	359	1227	644	1424	225	1147	1038
96%	97%	97%	95%	96%	96%	96%	95%	94%	97% e	96%	96%	96%	96%	97%
59	25	8	26	56	38	58	34	21	41	25	57	9	46	38
4%	3%	3%	5%	4%	4%	4%	5%	6% f	3%	4%	4%	4%	4%	3%

C4. Is your location the headquarters or a local branch / office?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Head office

Branch / local office

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
1545	250	33	1242	1500	1294	1507	1149	1535	2	863	1508	348	138	232	1172
96%	96%	91%	97%	96%	96%	96%	96%	96%	100%	96%	96%	97%	95%	97%	96%
59	10	3	45	59	52	59	52	57	-	33	59	9	8	8	43
4%	4%	9%	3%	4%	4%	4%	4%	4%	-%	4%	4%	3%	5%	3%	4%

C4. Is your location the headquarters or a local branch / office?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Head office

Branch / local office

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
1545	200	101	1234	1056	489	1441	104	997	120	375	1136	362	8
96%	97%	97%	96%	96%	96%	96%	97%	96%	96%	95%	97%	96%	98%
59	6	3	47	39	20	56	3	40	3	19	39	14	*
4%	3%	3%	4%	4%	4%	4%	3%	4%	2%	5%	3%	4%	2%

C4. Is your location the headquarters or a local branch / office?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Head office

Branch / local office

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1545	376	393	397	379
96%	96%	97%	97%	95%
59	16	10	13	20
4%	4%	3%	3%	5%

C5. Do you have an internet connection in the location where your organisation is based?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Yes

No

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1497	93	166	106	107	108	260	179	198	79	80	64	55	1297
93%	98%	94%	95%	92%	93%	94%	95%	95%	90%	92%	86%	88%	94%
	kl	k	k		k	k	kl	kl		k			kl
107	2	11	5	9	8	18	9	11	9	7	11	8	82
7%	2%	6%	5%	8%	7%	6%	5%	5%	10%	8%	14%	12%	6%
											abcetghjm	aghm	

C5. Do you have an internet connection in the location where your organisation is based?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Yes

No

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1497	1434	38	10	7	8	63	1072	425	1441	56	1015	283	105	95
93%	93%	98%	100%	100%	99%	99%	94%	92%	93%	94%	91%	97%	100%	100%
		a	a			a						a	a	ab
107	106	1	-	-	*	1	69	38	104	3	98	8	*	-
7%	7%	2%	-%	-%	1%	1%	6%	8%	7%	6%	9%	3%	*%	-%
	bcd										bcd	d		

C5. Do you have an internet connection in the location where your organisation is based?

Base: All respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%	a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	1413	75	43	43	30	274	123	179	217
Yes	1497	640	297	232	212	78	28	1309	72	43	43	30	271	121	178	215
	93%	89%	95%	97%	98%	100%	98%	93%	96%	100%	100%	100%	99%	99%	99%	99%
		a	a	a	ab	a			a	a						
No	107	79	15	7	5	*	*	104	3	-	-	-	2	1	2	2
	7%	11%	5%	3%	2%	1%	-	7%	4%	-	-	-	1%	1%	1%	1%
		bcdef	e					cd								

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

C5. Do you have an internet connection in the location where your organisation is based?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
1497	754	268	463	1383	876	1407	712	368	1198	652	1385	226	1122	1014
93%	93%	95%	93%	94%	97%	94%	98%	97%	94%	98%	94%	97%	94%	94%
				acf			acf	acf		b				
107	57	14	34	95	28	96	18	12	71	17	95	8	71	61
7%	7%	5%	7%	6%	3%	6%	2%	3%	6%	2%	6%	3%	6%	6%
				bde			bde		bde		a			

C5. Do you have an internet connection in the location where your organisation is based?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
1497	246	33	1202	1457	1275	1464	1138	1485	2	849	1463	345	144	231	1120
93%	94%	93%	93%	93%	95%	93%	95%	93%	100%	95%	93%	96%	99%	96%	92%
												b	c		
107	15	2	85	103	70	103	63	107	-	47	105	13	1	9	95
7%	6%	7%	7%	7%	5%	7%	5%	7%	-%	5%	7%	4%	1%	4%	8%
											c				ab

C5. Do you have an internet connection in the location where your organisation is based?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Yes

No

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
1497	204	100	1187	1064	433	1497	-	970	113	378	1090	368	8
93%	99%	96%	93%	97%	85%	100%	-%	93%	92%	96%	93%	98%	100%
	c			b		b				b			
107	2	4	95	31	76	-	107	68	9	17	85	8	-
7%	1%	4%	7%	3%	15%	-%	100%	7%	8%	4%	7%	2%	-%
			a		a		a				a		

C5. Do you have an internet connection in the location where your organisation is based?
Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Yes

No

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1497	375	378	380	363
93%	96%	94%	93%	91%
	d			
107	17	25	30	36
7%	4%	6%	7%	9%
				a

Table 6
C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?
Base: All respondents

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
Weighted total	1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
Senior Management (Managing Director, Director, Business Owner)	899	61	102	69	56	69	162	90	123	47	49	44	27	779
	56%	64% dgl	58% l	61% l	48% l	59% l	58% l	48% l	59% l	53% l	56% l	60% dgl	42% l	56% l
Office Admin / Office Management	519	32	63	28	44	28	84	74	54	33	29	20	31	439
	32%	33%	36%	25%	ehk	24%	30%	cehk	39%	26%	e	34%	26%	abcefhjkm
Finance / Accounts	97	2	6	10	8	11	10	11	19	7	4	6	3	83
	6%	2%	3%	9%	7%	10% f	4%	6%	9% f	8%	5%	8% f	6%	6%
Customer Service	17	*	*	*	1	1	6	2	5	-	*	*	1	16
	1%	*%	*%	*%	1%	1%	2%	1%	2%	-%	1%	*%	1%	1%
Sales	13	-	2	-	*	1	4	*	4	*	*	1	-	12
	1%	-%	1%	-%	*%	1%	1%	*%	2%	*%	*%	1%	-%	1%
Operations	9	-	-	2	1	*	2	2	-	*	2	*	*	7
	1%	-%	-%	2%	1%	*%	1%	1%	-%	*%	2%	*%	1%	1%
Company Secretary	6	-	2	-	1	-	2	-	-	-	-	1	-	5
	*%	-%	1%	-%	1%	-%	1%	-%	-%	-%	-%	1%	-%	*%
Procurement	6	-	1	*	-	1	2	2	-	-	-	-	-	6
	*%	-%	*%	*%	-%	1%	1%	1%	-%	-%	-%	-%	-%	*%
Marketing	4	-	-	2	1	-	-	-	*	-	*	-	*	4
	*%	-%	-%	2%	1%	-%	-%	-%	*%	-%	1%	-%	*%	*%
Facilities	4	-	2	2	-	-	-	-	-	-	-	-	-	4
	*%	-%	1%	2%	-%	-%	-%	-%	-%	-%	*%	-%	-%	*%
Mailroom	3	-	-	-	-	*	-	-	2	-	*	*	-	2
	*%	-%	-%	-%	-%	*%	-%	-%	1%	-%	*%	*%	-%	*%
Customer Relationship Management	2	-	-	-	-	1	*	-	-	-	-	-	-	2
	*%	-%	-%	-%	-%	1% m	*%	-%	-%	-%	-%	-%	-%	*%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	4	-	-	-	-	-	2	-	2	-	-	*	-	4
	*%	-%	-%	-%	-%	-%	1%	-%	1%	-%	-%	1%	-%	*%
Other answers	24	-	-	-	3	3	6	7	-	1	2	2	1	19
	1%	-%	-%	-%	2%	2%	2%	4%	-%	2%	2%	2%	2%	1%
							bhm							
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

Ofcom: Business Postal Tracker

Table 6 (continuation)

Page 50

C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?

Base: All respondents

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%	a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	1141	463	1545	59	1113	291	105	95
Senior Management (Managing Director, Director, Business Owner)	899 56%	890 58% bcdef	8 20% cde	1 7% 7	* 3% 3	1 7% 14% d	635 56%	264 57%	880 57% b	19 32%	682 61% bcd	126 43%	42 40%	48 51%
Office Admin / Office Management	519 32%	480 31%	21 5% a	6 63% a	5 70% a	7 80% abcf	361 32%	158 34%	493 32% a	26 43% ad	329 30% ad	122 42% ad	39 37%	29 30%
Finance / Accounts	97 6%	88 6%	5 14% ae	2 23% ae	1 17% ae	* 4% ae	71 6%	26 6%	96 6% b	1 1%	54 5% b	21 7% a	14 13% a	8 9% a
Customer Service	17 1%	15 1% a	1 3% a	* 5% a	- -% a	* 3% a	9 1%	7 2%	14 1% a	3 5% a	10 1% a	* % b	2 2% b	4 4% ab
Sales	13 1%	12 1% a	1 3% a	* 2% a	- -% a	* 4% a	8 1%	6 1%	11 1% a	3 5% a	6 1% a	5 2% a	2 2% a	1 1%
Operations	9 1%	9 1% a	* 1% a	- -% a	* 4% a	- -% a	1 1% a	1 % a	9 1% a	- -% a	4 % a	4 1% a	* % a	2 2% a
Company Secretary	6 %*	6 %*	- -% a	- -% a	- -% a	- -% a	6 1% a	- -% a	6 %* a	- -% a	4 %* a	2 1% a	- -% a	- -% a
Procurement	6 %*	5 %* a	1 2% a	- -% a	* 5% a	- -% a	6 1% a	- -% a	4 %* a	2 3% a	1 %* a	2 1% a	* %* a	2 2% a
Marketing	4 %*	4 %* a	1 2% a	- -% a	- -% a	- -% a	4 %* a	* %* a	4 %* a	- -% a	2 %* a	* %* a	2 %* ab	* 1%
Facilities	4 %*	4 %* a	* %* a	- -% a	- -% a	- -% a	4 %* a	- -% a	4 %* a	* %* a	4 %* a	- -% a	* %* a	- -% a
Mailroom	3 %*	2 %* a	* %* a	- -% a	* 2% a	* 1% a	2 %* a	* %* a	3 %* a	- -% a	- -% a	* %* a	2 2% ab	* %* a
Customer Relationship Management	2 %*	1 %* a	* 1% a	- -% a	- -% a	- -% a	1 %* a	* %* a	2 %* a	- -% a	1 %* a	* %* a	- -% a	* %* a
Refused	- -%	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a
Don't know	4 %*	4 %* a	- -% a	- -% a	- -% a	- -% a	4 %* a	* %* a	4 %* a	- -% a	4 %* a	- -% a	- -% a	- -% a
Other answers	24 1%	23 2% a	1 1% a	- -% a	- -% a	* 1% a	24 2% b	* %* a	18 1% a	6 11% a	15 1% a	8 3% a	1 1% a	* %* a

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 6 (continuation)

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C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Senior Management (Managing Director, Director, Business Owner)	899	511	148	111	88	27	9	4	800	28	21	32	18	131	61	86	106
	56%	71%	48%	47%	40%	35%	33%	37%	57%	37%	49%	75%	60%	48%	50%	48%	49%
		bcdef	ef	ef					b			abc	b				
Office Admin / Office Management	519	155	128	90	94	36	13	4	460	34	11	7	6	97	41	68	70
	32%	22%	41%	38%	43%	46%	45%	39%	33%	46%	25%	16%	20%	35%	33%	38%	32%
		a	a	a	a	a	a		d	acde							
Finance / Accounts	97	26	14	23	18	12	4	1	81	3	7	3	3	25	8	9	24
	6%	4%	4%	10%	8%	15%	15%	*	6%	5%	16%	6%	10%	9%	7%	5%	11%
				ab	a	ab	ab				ab						a
Customer Service	17	2	5	6	*	3	*	*	14	2	1	-	*	7	*	4	3
	1%	1%	2%	2%	1%	3%	1%	2%	1%	3%	2%	1%	1%	3%	1%	2%	1%
			a	ad		ad											
Sales	13	3	4	1	4	*	*	-	11	-	2	*	*	3	3	3	3
	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	5%	1%	1%	1%	2%	2%	1%
					a						ab						
Operations	9	4	-	2	1	*	*	2	6	3	*	*	-	1	3	-	4
	1%	1%	1%	1%	1%	1%	1%	18%	1%	4%	1%	1%	1%	1%	3%	1%	2%
										a					a		
Company Secretary	6	-	3	3	*	-	-	-	6	*	-	-	-	3	-	3	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%
			a	a												b	
Procurement	6	2	-	*	3	*	*	-	4	2	*	-	-	*	2	*	2
	1%	1%	1%	1%	1%	1%	2%	1%	1%	3%	1%	1%	1%	1%	2%	1%	1%
					ab		b			a					a		
Marketing	4	1	2	-	-	*	*	-	4	-	-	-	-	2	1	2	1
	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
						ad											
Facilities	4	2	2	-	-	-	-	-	4	*	-	-	-	2	-	2	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Mailroom	3	-	-	*	2	-	-	*	*	-	-	*	2	*	2	*	2
	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	7%	1%	2%	1%	1%
					a							a	abc				
Customer Relationship Management	2	-	-	1	*	-	-	-	1	-	-	-	*	1	*	1	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Don't know	4	4	-	-	-	-	-	-	4	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Other answers	24	9	7	2	6	*	-	-	22	2	*	*	-	3	2	2	2
	1%	1%	2%	1%	3%	1%	1%	1%	2%	3%	1%	1%	1%	1%	2%	1%	1%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 6 (continuation)

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C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Weighted total	1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
Senior Management (Managing Director, Director, Business Owner)	899	499	142	247	803	464	825	396	170	671	371	810	121	666	540
	56%	61% bc	50%	50%	54% e	51% e	55% e	54% e	45% e	53% e	55%	55%	52%	56% b	50%
Office Admin / Office Management	519	235	105	177	493	320	498	228	138	440	208	494	73	393	396
	32%	29%	37% a	36% a	33%	35%	33%	31%	36%	35%	31%	33%	31%	33%	37% a
Finance / Accounts	97	40	21	34	94	64	94	51	35	87	41	92	23	70	75
	6%	5%	7%	7%	6%	7%	6%	7%	9% ac	7%	6%	6%	10% ab	6%	7%
Customer Service	17	8	1	8	17	9	17	12	7	16	11	17	3	13	12
	1%	1%	*%	2%	1%	1%	1%	2%	2%	1%	2%	1%	1%	1%	1%
Sales	13	5	3	6	13	9	13	7	7	9	5	13	4	5	13
	1%	1%	1%	1%	1%	1%	1%	1%	2% f	1%	1%	1%	2%	*%	1% a
Operations	9	4	1	4	9	6	9	8	5	9	8	8	1	5	6
	1%	1%	*%	1%	1%	1%	1%	1%	1%	1%	1%	1%	*%	*%	1%
Company Secretary	6	*	2	4	6	6	6	-	3	6	4	6	1	6	4
	*%	*%	1%	1%	*%	1%	*%	-%	1%	*%	1%	*%	1%	1%	*%
Procurement	6	4	2	*	4	3	4	5	*	2	3	4	*	3	4
	*%	*%	1%	*%	*%	*%	*%	1%	*%	*%	*%	*%	*%	*%	*%
Marketing	4	2	*	2	4	4	4	2	2	3	2	4	2	3	4
	*%	*%	*%	*%	*%	*%	*%	*%	1%	*%	*%	*%	1%	*%	*%
Facilities	4	2	*	2	4	2	4	*	*	2	*	4	-	2	4
	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	-%	*%	*%
Mailroom	3	-	*	2	3	*	3	3	3	3	2	3	2	*	3
	*%	-%	*%	*%	*%	*%	*%	*%	1% b	*%	*%	*%	b	*%	*%
Customer Relationship Management	2	*	1	-	2	*	2	*	1	2	*	2	-	2	*
	*%	*%	*%	-%	*%	*%	*%	*%	*%	*%	*%	*%	-%	*%	*%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	4	4	-	-	4	2	4	-	-	2	*	4	-	4	3
	*%	1%	-%	-%	*%	*%	*%	-%	-%	*%	*%	*%	-%	*%	*%
Other answers	24	8	4	11	24	16	24	18	9	19	13	22	2	22	15
	1%	1%	1%	2%	2%	2%	2%	2%	2%	2%	2%	2%	1%	2%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 6 (continuation)

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C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?

Base: All respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Senior Management (Managing Director, Director, Business Owner)	899	144	17	718	869	735	874	666	893	-	484	875	211	88	127	682
	56%	55%	46%	56%	56%	55%	56%	55%	56%	-%	54%	56%	59%	60%	53%	56%
Office Admin / Office Management	519	88	13	418	505	450	506	379	513	2	299	507	92	34	91	393
	32%	34%	37%	33%	32%	33%	32%	32%	32%	100%	33%	32%	26%	23%	38%	32%
Finance / Accounts	97	23	2	69	97	86	97	81	97	-	57	97	26	11	5	79
	6%	9%	6%	5%	6%	6%	6%	7%	6%	-%	6%	6%	7%	7%	2%	6%
Customer Service	17	2	2	13	17	13	17	13	17	-	11	17	6	4	5	8
	1%	1%	5%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	3%	2%	1%
Sales	13	1	-	13	13	11	13	11	13	-	8	13	8	1	2	10
	1%	*%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	*%	1%	1%
Operations	9	1	-	9	9	8	9	9	9	-	9	9	1	-	3	7
	1%	*%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	*%	-%	1%	1%
Company Secretary	6	-	2	4	6	6	6	3	6	-	3	6	1	-	-	6
	*%	-%	6%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	-%	-%	1%
Procurement	6	-	-	6	6	6	6	6	6	-	3	6	2	*	3	2
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	1%	*%	1%	*%
Marketing	4	-	-	4	4	4	4	4	4	-	4	4	2	*	*	3
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	1%	*%	*%	*%
Facilities	4	-	*	4	4	4	4	4	4	-	4	4	2	-	*	4
	*%	-%	*%	*%	*%	*%	*%	*%	*%	-%	*%	*%	1%	-%	*%	*%
Mailroom	3	*	-	2	3	3	3	3	3	-	3	3	2	-	*	2
	*%	*%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	1%	-%	*%	*%
Customer Relationship Management	2	-	-	2	2	*	2	2	2	-	*	2	*	1	-	*
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	1%	-%	*%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	4	-	-	4	4	4	4	2	4	-	2	4	2	-	-	4
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	1%	-%	-%	*%
Other answers	24	2	-	22	24	19	24	22	24	-	13	24	3	6	3	15
	1%	1%	-%	2%	2%	1%	2%	2%	2%	-%	1%	2%	1%	4%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 6 (continuation)

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C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?
Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Senior Management (Managing Director, Director, Business Owner)	899 56%	114 55%	63 61%	718 56%	600 55%	299 59%	822 55%	77 72% a	570 55%	82 67% a	228 58%	644 55%	189 50%	4 44%
Office Admin / Office Management	519 32%	59 29%	31 30%	421 33%	362 33%	156 31%	496 33% b	23 21%	348 34%	30 25%	129 33%	387 33%	127 34%	4 52%
Finance / Accounts	97 6%	22 11% bc	1 1%	72 6%	73 7%	24 5%	94 6%	3 3%	58 6%	6 5%	14 4%	78 7% a	32 9%	* 2%
Customer Service	17 1%	1 *%	* *%	16 1%	16 1% b	1 *%	15 1%	2 2%	13 1%	2 1%	4 1%	13 1%	5 1%	* 2%
Sales	13 1%	2 1%	* *%	11 1%	11 1%	3 1%	13 1%	- -%	9 1%	* *%	3 1%	11 1%	5 1%	- -%
Operations	9 1%	3 2% c	2 2% c	4 *%	3 *%	6 1% a	9 1%	- -%	8 1%	* *%	2 1%	7 1%	2 *%	- -%
Company Secretary	6 *%	- -%	- -%	6 *%	6 1%	* *%	6 *%	* *%	* *%	- -%	1 *%	5 *%	3 1%	- -%
Procurement	6 *%	2 1%	* *%	4 *%	4 *%	1 *%	6 *%	- -%	4 *%	- -%	4 1% b	2 *%	2 1%	- -%
Marketing	4 *%	* *%	- -%	4 *%	3 *%	1 *%	4 *%	- -%	4 *%	- -%	- -%	4 *%	3 1%	- -%
Facilities	4 *%	- -%	- -%	4 *%	2 *%	2 *%	2 *% a	2 2% a	4 *%	- -%	- -%	4 *%	2 1%	- -%
Mailroom	3 *%	- -%	2 2% ac	* *%	2 *%	* *%	3 *%	- -%	3 *%	- -%	* *%	2 *%	3 1%	- -%
Customer Relationship Management	2 *%	1 1% c	- -%	* *%	- -%	2 *%	2 *%	- -%	* *%	- -%	- -%	2 *%	1 *%	- -%
Refused	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Don't know	4 *%	- -%	- -%	4 *%	- -%	4 1% a	4 *%	* *%	2 *%	- -%	- -%	4 *%	- -%	- -%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Other answers

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
24	1	4	19	13	11	24	-	18	2	9	14	4	-
1%	1%	4%	2%	1%	2%	2%	-%	2%	2%	2%	1%	1%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 6 (continuation)

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C6. We are talking to a wide range of customers with different responsibilities, so we'd like to understand your role within your organisation. Please could you tell me which type of department you work in?

Base: All respondents

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1604	405	410	403	386
Weighted total	1604	392	403	410	399
Senior Management (Managing Director, Director, Business Owner)	899 56%	193 49%	190 47%	233 57%	283 71%
				ab	abc
Office Admin / Office Management	519 32%	143 36%	163 41%	122 30%	91 23%
		cd	cd	d	
Finance / Accounts	97 6%	29 7%	32 8%	27 6%	9 2%
		d	d	d	
Customer Service	17 1%	4 1%	2 *	8 2%	2 1%
				b	
Sales	13 1%	7 2%	4 1%	2 1%	- -%
		d	d		
Operations	9 1%	4 1%	* *	2 1%	3 1%
Company Secretary	6 *	4 1%	- -%	2 1%	- -%
		bd			
Procurement	6 *	* *	2 *	1 *	2 1%
Marketing	4 *	- -%	* *	3 1%	* *
Facilities	4 *	* *	2 *	2 1%	- -%
Mailroom	3 *	* *	2 1%	* *	- -%
Customer Relationship Management	2 *	- -%	1 *	* *	- -%
Refused	- -%	- -%	- -%	- -%	- -%
Don't know	4 *	2 1%	- -%	2 1%	- -%
Other answers	24 1%	6 1%	4 1%	6 1%	8 2%

Columns Tested: a,b,c,d

Table 7

C7. Which one of the following statements best describes the role of mail services to your organisation?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Mail is used mainly for
administrative needs and
is not core to our
service delivery

Mail is critical for our
customer communications
and/or statements but is
not core to our business

Mail is core to our
business operations
(i.e. our business could
not function without it)

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
	95	176	112	117	116	278	189	209	88	87	75	63	1379
811	54	92	58	58	59	140	94	100	38	48	40	29	693
51%	57%	52%	52%	50%	51%	50%	50%	48%	43%	56% i	54%	46%	50%
282	24	25	20	16	25	48	39	33	21	13	10	8	250
18%	25% dkl	14%	18%	14%	21% k	17%	21%	16%	23% kl	16%	13%	13%	18%
498	17	59	31	43	31	87	55	74	27	25	23	25	424
31%	18%	34% a	28%	37% a	27%	31% a	29%	35% a	31%	29%	31% a	40% aegjm	31% a
13	-	*	2	-	1	4	-	2	3	-	2	-	12
1%	-%	*%	2%	-%	1%	1%	-%	1%	3% gil	-%	2% j	-%	1%

Ofcom: Business Postal Tracker

Table 7 (continuation) Page 58

C7. Which one of the following statements best describes the role of mail services to your organisation?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Mail is used mainly for administrative needs and is not core to our service delivery

Mail is critical for our customer communications and/or statements but is not core to our business

Mail is core to our business operations (i.e. our business could not function without it)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
811	786	16	4	2	3	25	583	228	786	25	685	83	26	18
51%	51%	41%	41%	29%	37%	39%	51%	49%	51%	42%	62%	29%	25%	18%
	bdf								b		bcd	d		
282	265	11	2	1	2	17	205	76	274	8	166	79	22	15
18%	17%	27%	26%	18%	27%	26%	18%	16%	18%	14%	15%	27%	21%	15%
		a				a						ad		
498	476	12	3	3	3	22	341	156	472	26	252	126	57	63
31%	31%	31%	33%	48%	34%	34%	30%	34%	31%	44%	23%	43%	54%	66%
				ab						a		a	ab	ab
13	13	*	-	*	*	1	11	3	13	*	10	3	-	*
1%	1%	*%	-%	5%	1%	1%	1%	1%	1%	1%	1%	1%	-%	*%
				abf										

Ofcom: Business Postal Tracker

Table 7 (continuation)

Page 59

C7. Which one of the following statements best describes the role of mail services to your organisation?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Mail is used mainly for administrative needs and is not core to our service delivery	811 51%	494 69% bcdef	152 49% cdef	83 35% ef	60 28% f	17 22% a	5 16% a	- -% g	767 54% bcde	16 22% ae	12 28% a	12 28% a	4 14% abcd	119 43% a	41 33% b	69 39% a	90 42% b
Mail is critical for our customer communications and/or statements but is not core to our business	282 18%	76 11% a	74 24% a	50 21% a	45 20% a	30 38% abcdf	7 24% a	* 1% g	246 17% a	20 26% ae	7 16% a	7 15% a	2 8% a	52 19% a	27 22% a	37 21% a	42 19% a
Mail is core to our business operations (i.e. our business could not function without it)	498 31%	140 19% a	84 27% a	103 43% ab	113 52% abe	31 40% ab	17 59% abce	10 99% a	388 27% a	39 52% a	23 53% a	25 57% a	23 77% abcd	103 38% a	52 43% b	73 41% a	82 38% b
Don't Know (DO NOT READ OUT)	13 1%	9 1% a	1 *% a	3 1% a	- -% a	- -% a	* 1% a	- -% a	12 1% a	- -% a	1 3% a	- -% a	- -% a	- -% a	3 2% a	- -% a	3 1% a

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

C7. Which one of the following statements best describes the role of mail services to your organisation?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Mail is used mainly for administrative needs and is not core to our service delivery

Mail is critical for our customer communications and/or statements but is not core to our business

Mail is core to our business operations (i.e. our business could not function without it)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
811	811	-	-	722	360	738	293	124	599	284	723	81	574	497
51%	100%	-%	-%	49%	40%	49%	40%	33%	47%	42%	49%	35%	48%	46%
	bc			bde	e	bde	e		bde	c	ac			
282	-	282	-	272	194	274	143	87	234	133	272	39	226	205
18%	-%	100%	-%	18%	21%	18%	20%	23%	18%	20%	18%	16%	19%	19%
		ac			c			acf						
498	-	-	498	475	347	482	289	166	430	247	477	114	387	369
31%	-%	-%	100%	32%	38%	32%	40%	44%	34%	37%	32%	49%	32%	34%
			ab		acf		acf	acf		b		ab		
13	-	-	-	9	3	9	4	2	5	4	9	-	7	4
1%	-%	-%	-%	1%	3%	1%	1%	1%	3%	1%	1%	-%	1%	3%

C7. Which one of the following statements best describes the role of mail services to your organisation?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Mail is used mainly for administrative needs and is not core to our service delivery

Mail is critical for our customer communications and/or statements but is not core to our business

Mail is core to our business operations (i.e. our business could not function without it)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
811	109	16	671	781	644	782	559	802	2	419	782	162	50	121	637
51%	42%	45%	52% a	50%	48%	50%	47%	50% d	100%	47%	50%	45%	34%	51% a	52% a
282	53	3	220	276	242	277	232	282	-	175	277	56	26	63	193
18%	20%	9%	17%	18%	18%	18%	19%	18%	-%	19%	18%	16%	18%	26% ac	16%
498	97	16	386	490	456	494	402	495	-	297	495	137	70	55	372
31%	37% c	46% c	30%	31%	34%	32%	33%	31%	-%	33%	32%	38% b	48% bc	23% b	31% b
13	1	-	10	13	4	13	8	13	-	5	13	3	-	*	13
1%	1%	-%	1%	1% b	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%

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Table 7 (continuation)

Page 62

C7. Which one of the following statements best describes the role of mail services to your organisation?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Mail is used mainly for
administrative needs and
is not core to our
service delivery

Mail is critical for our
customer communications
and/or statements but is
not core to our business

Mail is core to our
business operations
(i.e. our business could
not function without it)

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
1604	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
811	83	41	681	555	257	754	57	540	53	169	623	155	1
51%	40%	39%	53% ab	51%	50%	50%	53%	52%	43%	43%	53% a	41%	16%
282	34	16	227	209	73	268	14	166	29	86	188	76	2
18%	16%	16%	18%	19% b	14%	18%	13%	16%	24% a	22% b	16%	20%	22%
498	83	46	366	319	179	463	34	325	38	139	353	140	5
31%	41% c	45% c	29%	29%	35% a	31%	32%	31%	31%	35%	30%	37%	62%
13	6	*	7	12	1	12	1	6	2	1	10	5	-
1%	3% c	*%	1%	1%	*%	1%	1%	1%	2%	*%	1%	1%	-%

C7. Which one of the following statements best describes the role of mail services to your organisation?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Mail is used mainly for administrative needs and is not core to our service delivery

Mail is critical for our customer communications and/or statements but is not core to our business

Mail is core to our business operations (i.e. our business could not function without it)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
811	188	212	201	210
51%	48%	53%	49%	53%
282	63	78	66	75
18%	16%	19%	16%	19%
498	136	110	141	111
31%	35%	27%	34%	28%
	bd		bd	
13	5	3	2	4
1%	1%	1%	*%	1%

C8. Do you have an Account Manager with your postal services provider?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Yes

No

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
93	4	7	11	8	6	19	15	6	3	4	3	4	81
6%	4%	4%	10% h	7%	5%	7%	8%	3%	4%	5%	4%	6%	6%
1474	90	166	100	106	106	248	171	197	82	80	70	58	1267
92%	95%	94%	90%	91%	92%	89%	91%	94%	93%	92%	94%	91%	92%
37	1	3	1	2	3	11	2	5	3	2	1	1	32
2%	1%	2%	1%	2%	3%	4%	1%	3%	4%	3%	2%	2%	2%

C8. Do you have an Account Manager with your postal services provider?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Don't know

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
93	82	5	2	2	1	11	67	25	87	6	25	24	13	31
6%	5%	13%	21%	34%	15%	17%	6%	6%	6%	10%	2%	8%	13%	32%
		a	a	abef	a	a						a	a	abc
1474	1429	30	7	3	6	46	1044	430	1426	49	1068	262	86	58
92%	93%	76%	72%	43%	70%	71%	92%	93%	92%	82%	96%	90%	82%	61%
	bcd	d	d	d	d	d			b		bcd	cd	d	
37	29	4	1	2	1	8	30	8	32	5	20	5	6	6
2%	2%	11%	7%	22%	15%	12%	3%	2%	2%	8%	2%	2%	6%	7%
		a	a	abc	a	a				a			ab	ab

C8. Do you have an Account Manager with your postal services provider?

Base: All respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	1604							1364					291		197	
Weighted total	1604							1413					274		179	
Yes	93							55					28		14	
	6%							4%					10%		8%	
No	1474							1331					239		161	
	92%							94%					87%		90%	
Don't know	37							28					6		5	
	2%							2%					2%		3%	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 8 (continuation)

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C8. Do you have an Account Manager with your postal services provider?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
93	29	16	48	92	69	92	67	37	80	56	90	25	70	65
6%	4%	5%	10%	6%	8%	6%	9%	10%	6%	8%	6%	11%	6%	6%
			ab				act	act		b		b		
1474	770	256	435	1348	808	1374	643	328	1154	596	1353	202	1093	979
92%	95%	91%	87%	91%	89%	91%	88%	86%	91%	89%	91%	86%	92%	91%
	bc			de		de			de		c			
37	12	10	14	37	28	37	19	16	35	17	37	6	30	31
2%	2%	4%	3%	3%	3%	2%	3%	4%	3%	3%	3%	3%	3%	3%
		a												

C8. Do you have an Account Manager with your postal services provider?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
93	17	1	69	93	86	93	80	93	-	55	91	29	20	4	66
6%	7%	3%	5%	6%	6%	6%	7%	6%	-%	6%	6%	8%	14%	2%	5%
													bc		b
1474	240	33	1186	1430	1226	1437	1093	1463	2	815	1441	318	120	229	1124
92%	92%	92%	92%	92%	91%	92%	91%	92%	100%	91%	92%	89%	82%	96%	93%
														a	a
37	3	2	32	37	34	37	28	37	-	25	36	10	6	6	25
2%	1%	5%	2%	2%	3%	2%	2%	2%	-%	3%	2%	3%	4%	3%	2%

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Table 8 (continuation)

Page 69

C8. Do you have an Account Manager with your postal services provider?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Don't know

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	*b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
93	23	17	48	61	31	90	3	57	6	26	62	44	*
6%	11%	16%	4%	6%	6%	6%	2%	6%	5%	6%	5%	12%	5%
	c	c											
1474	174	86	1207	1006	469	1370	105	955	114	360	1086	325	8
92%	84%	83%	94%	92%	92%	92%	98%	92%	93%	91%	92%	86%	95%
			ab				a						
37	9	1	26	28	9	37	-	25	3	9	27	7	-
2%	5%	1%	2%	3%	2%	2%	-%	2%	2%	2%	2%	2%	-%
	c												

C8. Do you have an Account Manager with your postal services provider?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
93	32	18	16	26
6%	8%	5%	4%	7%
	bc			
1474	343	379	386	366
92%	88%	94%	94%	92%
		a	a	
37	16	5	8	7
2%	4%	1%	2%	2%
	bd			

Table 9
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.
Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
Below £83 (less than £1k per annum)

More than £83 but less than £208 (between £1k and £2.5k per annum)

More than £208 but less than £420 (between £2.5k and £5k per annum)

More than £420 but less than £835 (between £5k and 10k per annum)

More than £835 but less than £2,500 (between £10k and £30k per annum)

More than £2,500 but less than £17,000 (between £30k and £200k per annum)

More than £17,000 and less than £42,000 (between £200k and £500k per annum)

More than £42,000 and less than £500,000 (between £500k and £2m per annum)

£2m per annum or more

Don't know

Under 5k pa

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
	95	176	112	117	116	278	189	209	88	87	75	63	1379
1113	71	128	76	85	88	178	128	137	59	62	57	44	950
69%	74%	73%	68%	73%	76% f	64%	68%	66%	67%	71%	77% thm	69%	69%
291	18	31	17	21	18	56	37	40	16	16	10	11	254
18%	19%	18%	15%	18%	15%	20%	19%	19%	18%	19%	13%	17%	18%
105	2	8	13	7	3	23	11	17	8	5	4	4	92
7%	2%	5%	12% ae	6%	3%	8%	6%	8%	9%	6%	5%	6%	7%
40	2	2	4	1	4	8	6	4	4	2	1	3	34
2%	2%	1%	3%	1%	3%	3%	3%	2%	4%	2%	1%	5% dk	2%
36	-	6	*	1	*	10	4	11	1	1	2	1	31
2%	-%	3%	*%	1%	*%	3%	2%	5% de	1%	1%	2%	2%	2%
18	2	*	2	1	1	4	4	-	1	*	1	1	16
1%	2%	*%	2%	1%	1%	1%	2%	-%	1%	1%	1%	1%	1%
1	-	*	-	-	*	-	-	-	-	-	*	-	1
*%	-%	*%	-%	-%	*%	-%	-%	-%	-%	-%	*%	-%	*%
1	-	-	*	-	1	-	-	-	-	-	-	-	1
*%	-%	-%	*%	-%	1% m	-%	-%	-%	-%	-%	-%	-%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1509	91	168	106	114	109	257	175	194	83	83	71	58	1296
94%	96%	95%	95%	97%	94%	92%	93%	93%	94%	96%	95%	92%	94%

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Table 9: (continuation) Page 72

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.

Base: All respondents

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%	a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	1141	463	1545	59	1113	291	105	95
Below £83 (less than £1k per annum)	1113 69%	1091 71% bdef	16 42% cd	2 17% cd	1 13% cd	3 40% cd	22 35% cd	775 68% a	338 73% b	1078 70% bcd	35 59% bcd	1113 100% bcd	- -% bcd	- -% bcd
More than £83 but less than £208 (between £1k and £2.5k per annum)	291 18%	275 18% a	9 24% ae	3 32% ae	3 36% ae	1 13% ae	16 25% ae	219 19% a	72 16% a	276 18% a	15 25% a	- -% acd	291 100% acd	- -% acd
More than £208 but less than £420 (between £2.5k and £5k per annum)	105 7%	95 6% a	6 14% a	2 23% a	1 11% a	1 14% a	10 15% a	82 7% a	23 5% a	102 7% a	3 5% a	- -% abd	- -% abd	105 100% abd
More than £420 but less than £835 (between £5k and 10k per annum)	40 2%	32 2% a	4 10% a	2 16% a	1 17% a	2 18% a	8 12% a	33 3% a	7 1% a	35 2% a	4 8% a	- -% abc	- -% abc	- -% abc
More than £835 but less than £2,500 (between £10k and £30k per annum)	36 2%	31 2% a	3 8% a	1 9% a	1 9% a	1 8% a	5 8% a	21 2% a	15 3% a	35 2% a	1 2% a	- -% abc	- -% abc	- -% abc
More than £2,500 but less than £17,000 (between £30k and £200k per annum)	18 1%	16 1% a	1 2% a	* 3% abf	1 10% abf	* 2% a	2 3% a	9 1% a	8 2% a	17 1% a	* % a	- -% abc	- -% abc	- -% abc
More than £17,000 and less than £42,000 (between £200k and £500k per annum)	1 *%	- -% a	- -% a	- -% ab	* 5% ab	* 4% ab	1 1% a	1 *% a	- -% a	1 *% a	- -% a	- -% a	- -% a	1 1% a
More than £42,000 and less than £500,000 (between £500k and £2m per annum)	1 *%	1 *% a	- -% a	- -% ab	- -% ab	* 2% ab	* % ab	1 *% a	- -% a	1 *% a	* % a	- -% ab	- -% ab	- -% ab
£2m per annum or more	- -%	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a
Don't know	- -%	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a	- -% a
Under 5k pa	1509 94%	1461 95% bdef	31 80% de	7 72% de	4 60% de	6 67% de	48 75% d	1075 94% d	434 94% d	1455 94% d	54 90% d	1113 100% d	291 100% d	105 100% d

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 9 (continuation) Page 73

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.

Base: All respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total																
Weighted total																
Below £83 (less than £1k per annum)																
More than £83 but less than £208 (between £1k and £2.5k per annum)																
More than £208 but less than £420 (between £2.5k and £5k per annum)																
More than £420 but less than £835 (between £5k and 10k per annum)																
More than £835 but less than £2,500 (between £10k and £30k per annum)																
More than £2,500 but less than £17,000 (between £30k and £200k per annum)																
More than £17,000 and less than £42,000 (between £200k and £500k per annum)																
More than £42,000 and less than £500,000 (between £500k and £2m per annum)																
£2m per annum or more																
Don't know																
Under 5k pa																

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 9 (continuation)

Page 74

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.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Below £83 (less than £1k

per annum)

More than £83 but less
than £208 (between £1k
and £2.5k per annum)

More than £208 but less
than £420 (between £2.5k
and £5k per annum)

More than £420 but less
than £835 (between £5k
and 10k per annum)

More than £835 but less
than £2,500 (between
£10k and £30k per annum)

More than £2,500 but
less than £17,000
(between £30k and £200k
per annum)

More than £17,000 and
less than £42,000
(between £200k and £500k
per annum)

More than £42,000 and
less than £500,000
(between £500k and £2m
per annum)

£2m per annum or more

Don't know

Under 5k pa

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
1113	685	166	252	1006	526	1026	369	176	836	354	1013	99	806	697
69%	84% bc	59% c	51%	68% bde	58% de	68% bde	51%	46% 66%	66% bde	53% c	68% ac	42%	68%	65%
291	83	79	126	280	225	282	183	111	260	165	276	59	230	214
16%	10%	28% a	25% a	19%	25% acf	19%	25% acf	29% acf	20%	25% b	19%	25% b	19%	20%
105	26	22	57	102	76	104	92	50	94	79	103	33	88	86
7%	3%	8% a	11% a	7%	8%	7%	13% abcf	13% abcf	7%	12% b	7%	14% b	7%	8%
40	12	9	19	36	35	37	36	16	31	27	38	22	32	34
2%	1%	3%	4% a	2%	4% a	2%	5% acf	4% a	2%	4%	3%	10% ab	3%	3%
36	4	4	28	35	26	35	31	12	32	31	33	14	25	27
2%	*%	1%	6% ab	2%	3%	2%	4% acf	3%	3%	5% b	2%	6% b	2%	3%
18	2	2	14	16	14	16	16	12	14	12	16	5	12	15
1%	*%	1%	3% ab	1%	2%	1%	2% ac	3% abcf	1%	2%	1%	2%	1%	1%
1	-	-	1	1	1	1	1	*	*	1	1	*	1	1
*%	-%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
1	-	-	1	1	1	1	1	1	1	1	1	1	1	1
*%	-%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	1%	*%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1509	794	267	435	1389	827	1413	645	338	1189	597	1392	191	1123	997
94%	98% bc	95% c	87%	94% bde	92% d	94% bde	88% 89%	89% 89%	94% bde	89% c	94% ac	82%	94% 94%	93%

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Table 9 (continuation)

Page 75

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.
Base: All respondents

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%															
Unweighted total															
Weighted total															
Below £83 (less than £1k per annum)															
More than £83 but less than £208 (between £1k and £2.5k per annum)															
More than £208 but less than £420 (between £2.5k and £5k per annum)															
More than £420 but less than £835 (between £5k and 10k per annum)															
More than £835 but less than £2,500 (between £10k and £30k per annum)															
More than £2,500 but less than £17,000 (between £30k and £200k per annum)															
More than £17,000 and less than £42,000 (between £200k and £500k per annum)															
More than £42,000 and less than £500,000 (between £500k and £2m per annum)															
£2m per annum or more															
Don't know															
Under 5k pa															

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 9 (continuation)

Page 76

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.
Base: All respondents

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%													
Unweighted total	1604												
Weighted total	1604												
Below £83 (less than £1k per annum)	1113 69%	90 44%	39 38%	976 76% ab	748 68%	365 72%	1015 68%	98 92% a	737 71%	79 64%	242 61%	850 72% a	174 46% - -
More than £83 but less than £208 (between £1k and £2.5k per annum)	291 18%	55 27% c	24 23%	208 16%	210 19%	81 16%	283 19% b	8 8%	182 18%	24 20%	75 19%	205 17%	103 27% 6 71%
More than £208 but less than £420 (between £2.5k and £5k per annum)	105 7%	32 16% c	16 16% c	56 4%	78 7%	27 5%	105 7% b	* *%	60 6%	11 9%	32 8%	70 6%	47 13% 2 24%
More than £420 but less than £835 (between £5k and £10k per annum)	40 2%	13 6% c	5 5% c	21 2%	23 2%	17 3%	40 3%	- -%	23 2%	2 2%	19 5% b	21 2%	24 6% - -
More than £835 but less than £2,500 (between £10k and £30k per annum)	36 2%	7 3% c	14 13% ac	15 1%	23 2%	13 2%	36 2%	- -%	21 2%	5 4%	17 4% b	18 2%	15 4% * 3%
More than £2,500 but less than £17,000 (between £30k and £200k per annum)	18 1%	8 4% c	5 5% c	4 *% *	11 1%	6 1%	18 1%	- -%	14 1%	- -%	8 2%	10 1%	13 3% * 2%
More than £17,000 and less than £42,000 (between £200k and £500k per annum)	1 *%	- -%	* *%	* *% *	* *%	1 *%	1 *%	- -%	* *%	* *%	* *%	* *%	1 *% - -
More than £42,000 and less than £500,000 (between £500k and £2m per annum)	1 *%	1 1% c	- -%	* *% *	1 *%	- -%	1 *%	- -%	1 *%	* *%	1 *% b	- -%	- -% - -
£2m per annum or more	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -% - -
Don't know	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -% - -
Under 5k pa	1509 94%	177 86% b	79 76%	1241 97% ab	1036 95%	473 93%	1402 94%	107 100% a	978 94%	115 93%	349 88%	1125 96% a	324 86% 8 95%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 9 (continuation)

Page 77

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.
Base: All respondents

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1604	405	410	403	386
Weighted total	1604	392	403	410	399
Below £83 (less than £1k per annum)	1113 69%	266 68%	258 64%	301 74% b	288 72% b
More than £83 but less than £208 (between £1k and £2.5k per annum)	291 18%	72 18%	87 22% c	61 15%	71 18%
More than £208 but less than £420 (between £2.5k and £5k per annum)	105 7%	31 8% d	34 9% d	26 6%	13 3%
More than £420 but less than £835 (between £5k and 10k per annum)	40 2%	4 1%	11 3%	7 2%	17 4% ac
More than £835 but less than £2,500 (between £10k and £30k per annum)	36 2%	11 3%	11 3%	10 2%	5 1%
More than £2,500 but less than £17,000 (between £30k and £200k per annum)	18 1%	7 2% b	1 *%	5 1%	4 1%
More than £17,000 and less than £42,000 (between £200k and £500k per annum)	1 *%	* *%	* *%	- -%	- -%
More than £42,000 and less than £500,000 (between £500k and £2m per annum)	1 *%	- -%	1 *%	- -%	* *%
£2m per annum or more	- -%	- -%	- -%	- -%	- -%
Don't know	- -%	- -%	- -%	- -%	- -%
Under 5k pa	1509 94%	369 94%	379 94%	388 95%	372 93%

Columns Tested: a,b,c,d

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.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m +

Don't know

0-49

50+

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
719	95	176	112	117	116	278	189	209	88	87	75	63	1379
45%	47	77	61	52	49	112	79	104	32	42	40	23	614
	49%	44%	55%	45%	42%	40%	42%	50%	36%	49%	54%	37%	44%
			fil					il		il	fgilm		
312	20	43	24	22	22	52	35	33	20	16	14	12	271
19%	21%	24%	21%	19%	19%	19%	19%	16%	22%	16%	18%	16%	20%
239	11	20	13	22	19	53	29	28	19	8	9	9	213
15%	12%	12%	11%	19%	16%	19%	15%	14%	21%	9%	12%	14%	15%
				j		jk			jk			j	
218	9	20	10	13	18	43	33	29	10	14	8	11	185
14%	10%	11%	9%	11%	15%	16%	17%	14%	12%	16%	10%	17%	13%
												k	
78	6	13	2	5	3	12	6	12	8	4	3	4	67
5%	6%	7%	2%	4%	3%	4%	3%	6%	9%	5%	4%	6%	5%
29	*	3	-	2	4	5	4	2	1	3	2	4	21
2%	*	2%	-	2%	3%	2%	2%	1%	1%	3%	2%	6%	1%
												acfhikm	
9	2	-	2	*	1	2	2	-	-	*	*	-	9
1%	2%	-	2%	*	1%	1%	1%	-	-	*	*	-	1%
*	-	*	*	-	-	-	-	-	-	-	-	-	*
*%	-	*%	*%	-	-	-	-	-	-	-	-	-	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-
1031	67	120	85	74	71	164	115	137	51	58	54	35	884
64%	70%	68%	76%	64%	62%	59%	61%	66%	58%	67%	72%	55%	64%
	l	l	efgilm						l	l	fgilm		l
573	28	56	27	42	45	114	74	71	37	29	21	28	495
36%	30%	32%	24%	36%	38%	41%	39%	34%	42%	33%	28%	45%	36%
					c	ck	ck		ck			abcjkm	ck

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Table 10 (continuation)

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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.

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
0 - 24	719	711	6	*	*	1	8	507	212	692	27	648	45	17	9
	45%	46%	16%	2%	3%	16%	13%	44%	46%	45%	45%	58%	15%	16%	10%
		bcdef	cd			cd	c					bcd			
25 - 49	312	299	8	2	*	2	13	222	90	300	12	246	47	7	11
	19%	19%	21%	19%	2%	30%	20%	19%	19%	19%	20%	22%	16%	7%	11%
		d	d	d	d	d	d					bcd	c		
50 - 99	239	231	4	1	1	1	8	166	73	233	6	145	62	17	15
	15%	15%	11%	12%	16%	13%	12%	15%	16%	15%	10%	13%	21%	16%	16%
												a			
100 - 249	218	204	8	2	1	1	13	161	57	209	9	63	99	35	21
	14%	13%	21%	25%	16%	17%	21%	14%	12%	14%	15%	6%	34%	33%	22%
		a	a	a		a	a					ad	ad		a
250 - 499	78	67	8	3	1	*	12	57	22	75	3	8	33	20	16
	5%	4%	19%	27%	15%	6%	18%	5%	5%	5%	6%	1%	11%	19%	17%
			ae	ae	a		ae					a		ab	a
500 - 4,999	29	19	5	1	3	1	10	23	5	27	2	2	4	9	14
	2%	1%	12%	11%	41%	14%	15%	2%	1%	2%	3%	*	1%	8%	15%
			a	a	abcef	a	a					a		ab	ab
5,000 - 49,999	9	8	-	*	*	*	1	6	4	9	*	-	-	-	9
	1%	1%	-	3%	3%	3%	1%	1%	1%	1%	1%	-	-	-	10%
				ab	ab	ab									abc
50,000 - 499,999	*	-	-	-	*	*	*	*	-	*	*	-	-	-	*
	1%	-	-	-	5%	2%	1%	1%	-	1%	1%	-	-	-	1%
					abf	ab	a								a
500,000 - 4,999,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5m +	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
0-49	1031	1010	14	2	*	4	21	728	302	992	39	894	92	25	20
	64%	66%	37%	22%	5%	45%	32%	64%	65%	64%	65%	80%	32%	24%	21%
		bcdef	cd	d		cd	d					bcd	d		
50+	573	530	25	8	7	5	44	412	161	553	21	219	199	80	76
	36%	34%	63%	78%	95%	55%	68%	36%	35%	36%	35%	20%	68%	76%	79%
			a	abe	abcef	a	a					a		a	ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 10 (continuation)

Page 80

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.

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																	
Unweighted total	1604	a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Weighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
		719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
0 - 24	719	719	-	-	-	-	-	-	691	12	10	3	3	77	50	45	82
	45%	100%	-%	-%	-%	-%	-%	-%	49%	16%	23%	8%	9%	28%	41%	25%	38%
		bcdef							bcde		d			a			a
25 - 49	312	-	312	-	-	-	-	-	282	17	4	6	3	56	27	36	46
	19%	-%	100%	-%	-%	-%	-%	-%	20%	23%	9%	14%	9%	21%	22%	20%	21%
			acdef							c							
50 - 99	239	-	-	239	-	-	-	-	208	12	9	9	1	53	12	33	31
	15%	-%	-%	100%	-%	-%	-%	-%	15%	15%	21%	22%	3%	19%	10%	19%	14%
				abdef					e	e	e	e		b			
100 - 249	218	-	-	-	218	-	-	-	165	19	9	15	9	45	17	34	28
	14%	-%	-%	-%	100%	-%	-%	-%	12%	26%	21%	36%	29%	16%	14%	19%	13%
				abcef					a	a	a	a	a				
250 - 499	78	-	-	-	-	78	-	-	46	11	7	5	10	30	14	21	23
	5%	-%	-%	-%	-%	100%	-%	-%	3%	15%	16%	12%	32%	11%	11%	12%	11%
					abcdf				a	a	a	a	abd				
500 - 4,999	29	-	-	-	-	-	29	-	19	2	2	4	3	9	3	6	5
	2%	-%	-%	-%	-%	-%	100%	-%	1%	2%	4%	8%	10%	3%	2%	4%	2%
						abcde					a	a	a				
5,000 - 49,999	9	-	-	-	-	-	-	9	3	2	2	*	2	4	*	3	*
	1%	-%	-%	-%	-%	-%	-%	95%	1%	2%	4%	1%	7%	1%	1%	2%	1%
									a	a	a	a	a				
50,000 - 499,999	*	-	-	-	-	-	-	*	-	-	*	-	*	-	*	-	*
	1%	-%	-%	-%	-%	-%	-%	5%	-	-%	1%	-%	1%	-%	1%	-%	1%
									a	a	a	a	a				
500,000 - 4,999,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
5m +	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
0-49	1031	719	312	-	-	-	-	-	973	29	14	10	6	133	77	82	128
	64%	100%	100%	-%	-%	-%	-%	-%	69%	39%	32%	22%	19%	49%	63%	46%	59%
		cdef	cdef						bcde	de				a	a	a	a
50+	573	-	-	239	218	78	29	10	441	46	29	33	24	140	46	98	89
	36%	-%	-%	100%	100%	100%	100%	100%	31%	61%	68%	78%	81%	51%	37%	54%	41%
				ab	ab	ab	ab		a	a	a	ab	ab	b		b	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 10 (continuation)

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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.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

45%

25 - 49

19%

50 - 99

15%

100 - 249

14%

250 - 499

5%

500 - 4,999

2%

5,000 - 49,999

9%

1%

50,000 - 499,999

*

500,000 - 4,999,999

5m +

Don't know

0-49

64%

50+

36%

1031

573

64%

573

36%

1031

573

64%

573

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36%

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Table 10 (continuation)

Page 82

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.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m +

Don't know

0-49

50+

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail			
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same	
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c	
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201	
	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215	
719	88	15	603	680	549	685	478	709	2	343	691	125	49	79	589	
45%	34%	42%	47% a	44% d	41%	44% d	40%	45% bd	100%	38%	44% ac	35%	34%	33%	48% ab	
312	63	5	239	312	270	312	246	312	-	204	311	72	27	76	208	
19%	24% c	14%	19%	20%	20%	20%	20%	20%	-%	23%	20%	20%	18%	32% ac	17%	
239	46	6	185	236	213	238	198	239	-	146	237	61	21	32	186	
15%	18%	16%	14%	15%	16%	15%	16%	15%	-%	16%	15%	17%	14%	13%	15%	
218	40	6	171	216	207	216	178	216	-	131	215	64	16	40	162	
14%	15%	16%	13%	14%	15%	14%	15%	14%	-%	15%	14%	18% b	11%	17%	13%	
78	14	2	63	78	71	78	69	78	-	45	78	19	21	8	49	
5%	5%	6%	5%	5%	5%	5%	6%	5%	-%	5%	5%	5%	14%	3%	4%	
													bc			
29	9	2	18	29	28	29	24	29	-	20	28	13	8	4	16	
2%	4% c	6%	1%	2%	2%	2%	2%	2%	-%	2%	2%	4% b	6%	2%	1%	
													bc			
9	2	-	7	9	8	9	8	9	-	6	7	2	4	*	5	
1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	3%	1%	1%	
													bc			
*	-	-	*	*	*	*	*	*	-	*	*	*	-	*	*	
1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%	
50,000 - 499,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
500,000 - 4,999,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
5m +	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
0-49	1031	150	20	842	992	819	997	724	1021	2	547	1002	197	76	155	797
	64%	58%	56%	65%	64%	61%	64%	60%	64%	100%	61%	64%	55%	52%	65%	66%
			a						d		c	c		a	a	
573	110	16	444	568	527	570	477	571	-	349	566	161	70	85	418	
36%	42% c	44%	35%	36%	39%	36%	40% e	36%	-%	39%	36%	45% ab	48% bc	35%	34%	

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Table 10 (continuation)

Page 83

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.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m +

Don't know

0-49

50+

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
719	75	34	605	460	259	640	79	472	51	141	560	130	*
45%	37%	33%	47% ab	42%	51% a	43%	74% a	46%	41%	36%	48% a	35%	6%
312	28	21	262	226	86	297	15	189	25	87	218	78	3
19%	14%	20% a	20% a	21%	17%	20%	14%	18%	20%	22%	19%	21%	40%
239	36	13	185	165	74	232	7	165	21	56	178	64	*
15%	18%	12%	14%	15%	15%	15%	7%	16%	17%	14%	15%	17%	6%
218	41	17	158	161	57	212	5	131	17	67	147	56	-
14%	20% c	16%	12%	15%	11%	14% b	5%	13% b	14%	17% b	12%	15%	-%
78	19	13	46	58	20	78	*	53	6	29	49	35	2
5%	9% c	12% c	4%	5%	4%	5% b	*%	5%	5%	7% b	4%	9%	29%
29	4	4	20	24	5	28	*	18	3	12	16	9	1
2%	2%	4%	2%	2%	1%	2%	*%	2%	2%	3% b	1%	2%	16%
9	2	2	5	*	9	9	-	9	-	2	7	4	*
1%	1%	2%	*%	*%	2% a	1%	-%	1%	-%	1%	1%	1%	2%
*	-	*	*	*	*	*	-	-	*	*	-	*	-
*%	-%	*%	*%	*%	*%	*%	-%	-%	*% a	*%	-%	*%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1031	103	55	867	686	344	937	94	662	75	228	778	208	4
64%	50%	53%	68% ab	63%	68%	63%	88% a	64%	61%	58%	66% a	55%	46%
573	103	49	414	409	165	560	13	376	47	167	397	168	4
36%	50% c	47% c	32%	37%	32%	37% b	12%	36%	39%	42% b	34%	45%	54%

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Table 10 (continuation)

Page 84

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.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m +

Don't know

0-49

50+

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
719	146	137	206	231
45%	37%	34%	50%	58%
			ab	abc
312	86	104	64	57
19%	22%	26%	16%	14%
	cd	cd		
239	72	59	61	47
15%	18%	15%	15%	12%
	d			
218	50	67	62	39
14%	13%	17%	15%	10%
		d	d	
78	19	24	13	22
5%	5%	6%	3%	5%
29	11	10	5	3
2%	3%	3%	1%	1%
	d	d		
9	7	2	-	*
1%	2%	*%	-%	*%
	cd			
*	*	-	-	*
*%	*%	-%	-%	*%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
1031	232	241	270	288
64%	59%	60%	66%	72%
			a	ab
573	160	162	140	111
36%	41%	40%	34%	28%
	cd	d		

QV2b. And on average, how many parcels and packets does your organisation send per month? Again please think ONLY about the packets and parcels you may send as an organisation.
Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m+

Don't know

25+

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1413	85	159	102	106	107	240	161	177	76	78	68	56	1212
88%	90%	90%	91%	91%	92%	86%	85%	85%	86%	90%	91%	88%	88%
75	4	7	4	4	*	10	16	14	5	5	3	2	65
5%	4%	4%	4%	4%	%	4%	9%	7%	6%	6%	3%	3%	5%
e	e	e					ekl	e	e	e			e
43	4	1	2	1	5	9	6	5	6	2	1	3	38
3%	4%	1%	2%	%	4%	3%	3%	2%	7%	2%	1%	5%	3%
43	2	5	4	4	1	13	4	6	*	1	2	1	38
3%	2%	3%	3%	4%	%	5%	2%	3%	%	1%	3%	2%	3%
e													
18	-	5	-	*	1	2	*	7	-	1	1	1	16
1%	-%	3%	-%	%	1%	1%	%	3%	-%	1%	1%	1%	1%
10	-	-	*	1	2	2	*	*	1	*	*	1	9
1%	-%	-%	%	1%	1%	1%	1%	%	1%	%	1%	1%	1%
2	-	-	-	-	-	2	-	-	-	-	-	-	2
%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
50,000 - 499,999	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
500,000 - 4,999,999	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
5m+	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
191	10	17	10	11	9	38	28	32	12	9	6	7	168
12%	10%	10%	9%	9%	8%	14%	15%	15%	14%	10%	9%	12%	12%

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Table 11 (continuation)

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QV2b. And on average, how many parcels and packets does your organisation send per month? Again please think ONLY about the packets and parcels you may send as an organisation.

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m+

Don't know

25+

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1413	1368	30	6	4	5	45	1003	411	1365	49	1087	242	61	23
88%	89%	76%	65%	54%	65%	70%	88%	89%	88%	82%	98%	83%	58%	24%
	bcd	d				d			b		bcd	cd	d	
75	67	4	1	1	1	8	58	17	69	6	18	33	11	12
5%	4%	11%	13%	10%	16%	12%	5%	4%	4%	10%	2%	11%	11%	13%
		a	a		a	a			a			a	a	a
43	39	2	1	1	1	4	37	6	41	3	6	7	15	15
3%	3%	4%	9%	14%	8%	6%	3%	1%	3%	4%	1%	2%	14%	16%
			a	ab	a	a	b					a	ab	ab
43	39	2	*	1	*	4	27	16	42	1	1	4	12	26
3%	3%	5%	5%	13%	1%	6%	2%	3%	3%	2%	*	1%	12%	27%
		a		ae	a	a						a	ab	abc
18	16	1	*	*	1	2	11	7	17	1	1	5	4	8
1%	1%	3%	1%	2%	8%	3%	1%	1%	1%	2%	*	2%	4%	8%
		a			a	a						a	a	ab
10	8	*	1	*	*	2	5	5	10	*	-	*	*	10
1%	1%	1%	7%	6%	2%	3%	%	1%	1%	%	-%	%	%	10%
			ab	ab		a							a	abc
2	2	-	-	-	-	-	-	2	2	-	-	-	-	2
%	%	-%	-%	-%	-%	-%	-%	%	%	-%	-%	-%	-%	2%
								a						ab
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
191	172	10	3	3	3	19	138	53	180	11	26	49	44	72
12%	11%	24%	35%	46%	35%	30%	12%	11%	12%	18%	2%	17%	42%	76%
		a	a	abf	a	a				a		a	ab	abc

QV2b. And on average, how many parcels and packets does your organisation send per month? Again please think ONLY about the packets and parcels you may send as an organisation.

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
0 - 24	1413	691	282	208	165	46	19	3	1413	-	-	-	-	204	70	139	135
	88%	96%	90%	87%	76%	58%	66%	34%	100%	-%	-%	-%	-%	75%	57%	78%	62%
		bcdef	def	def	e				bcde					b		b	
25 - 49	75	12	17	12	19	11	2	2	-	75	-	-	-	21	16	13	23
	5%	2%	5%	5%	9%	14%	6%	18%	-%	100%	-%	-%	-%	8%	13%	7%	11%
		a		a	a	abc	a		-%	acde							
50 - 99	43	10	4	9	9	7	2	2	-	-	43	-	-	17	14	8	23
	3%	1%	1%	4%	4%	9%	6%	23%	-%	-%	100%	-%	-%	6%	11%	4%	10%
				a	ab	ab	ab				abde					a	
100 - 249	43	3	6	9	15	5	4	*	-	-	-	43	-	20	12	12	20
	3%	1%	2%	4%	7%	6%	12%	2%	-%	-%	-%	100%	-%	7%	9%	6%	9%
		a		a	ab	ab	abc					abce					
250 - 499	18	3	3	*	5	6	1	-	-	-	-	-	18	6	7	4	10
	1%	1%	1%	1%	2%	8%	4%	-%	-%	-%	-%	-%	60%	2%	6%	2%	4%
					ac	abcd	ac						abcd				
500 - 4,999	10	-	-	*	4	4	2	*	-	-	-	-	10	5	4	4	6
	1%	-%	-%	1%	2%	5%	7%	3%	-%	-%	-%	-%	34%	2%	3%	2%	3%
					ab	abc	abcd						abcd				
5,000 - 49,999	2	-	-	-	-	-	-	2	-	-	-	-	2	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	18%	-%	-%	-%	-%	6%	-%	-%	-%	-%
													ab				
50,000 - 499,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
500,000 - 4,999,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
5m+	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
25+	191	28	30	31	53	33	10	6	-	75	43	43	30	69	52	40	81
	12%	4%	10%	13%	24%	42%	34%	66%	-%	100%	100%	100%	100%	25%	43%	22%	38%
		a	a	a	abc	abcd	abc		a	a	a	a	a	a	a	a	a

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 11 (continuation)

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QV2b. And on average, how many parcels and packets does your organisation send per month? Again please think ONLY about the packets and parcels you may send as an organisation.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m+

Don't know

25+

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
1413	767	246	388	1303	762	1324	552	296	1109	523	1304	158	1062	926
88%	95%	87%	78%	88%	84%	88%	76%	78%	67%	78%	88%	68%	89%	86%
	bc	c		bde	de	bde			bde	c	ac		b	
25 - 49	16	20	39	70	56	70	68	28	67	55	66	23	47	55
5%	2%	7%	8%	5%	6%	5%	9%	7%	5%	8%	4%	10%	4%	5%
		a	a				abcf	ac		b		b		
50 - 99	12	7	23	38	31	40	43	19	31	32	38	20	30	31
3%	1%	2%	5%	3%	3%	3%	6%	5%	2%	5%	3%	8%	3%	3%
			a				abcf	acf		b		ab		
100 - 249	12	7	25	41	33	43	41	21	39	34	43	18	35	38
3%	1%	2%	5%	3%	4%	3%	6%	6%	3%	5%	3%	8%	3%	4%
			a				abcf	acf		b		b		
250 - 499	3	2	13	15	11	16	15	7	13	14	17	9	8	14
1%	*%	1%	3%	1%	1%	1%	2%	2%	1%	2%	1%	4%	1%	1%
			a									b		
500 - 4,999	2	*	8	10	10	10	10	8	8	10	10	5	10	10
1%	*%	*%	2%	1%	1%	1%	1%	2%	1%	1%	1%	2%	1%	1%
			a					acf				b		
5,000 - 49,999	2	-	2	2	2	2	2	-	2	2	2	2	2	2
*%	-%	-%	*%	*%	*%	*%	*%	-%	*%	*%	*%	1%	*%	*%
												b		
50,000 - 499,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
500,000 - 4,999,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
5m+	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
25+	45	36	109	175	143	180	178	84	159	146	176	76	131	150
12%	5%	13%	22%	12%	16%	12%	24%	22%	13%	22%	12%	32%	11%	14%
		a	ab		acf		abcf	abcf		b		ab		a

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Table 11 (continuation)

Page 89

QV2b. And on average, how many parcels and packets does your organisation send per month? Again please think ONLY about the packets and parcels you may send as an organisation.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m+

Don't know

25+

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
1413	217	31	1151	1373	1172	1380	1034	1402	2	774	1381	284	90	225	1096
88%	83%	86%	89% a	88%	87%	88%	86%	88%	100%	86% c	88% c	79%	62% a	94% a	90% a
75	17	2	55	74	69	74	66	75	-	50	75	22	15	7	52
5%	7%	6%	4%	5%	5%	5%	5%	5%	-%	6%	5%	6%	10% bc	3%	4%
43	5	-	34	41	39	41	38	43	-	26	41	13	7	4	31
3%	2%	-%	3%	3%	3%	3%	3%	3%	-%	3%	3%	4%	5%	2%	3%
43	11	2	28	42	39	42	36	43	-	24	42	18	15	1	27
3%	4%	5%	2%	3%	3%	3%	3%	3%	-%	3%	3%	5% ab	10% bc	*% bc	2%
18	4	-	13	18	15	18	15	18	-	14	18	12	13	*	4
1%	2%	-%	1%	1%	1%	1%	1%	1%	-%	2%	1%	3% ab	9% bc	*% bc	*% bc
10	5	1	5	10	10	10	10	10	-	6	10	5	5	2	4
1%	2% c	4% c	*% c	1%	1%	1%	1%	1%	-%	1%	1%	2% bc	3% bc	1% bc	*% bc
2	2	-	-	2	2	2	2	2	-	2	2	2	2	-	-
*%	1% c	-% c	-% c	*% c	*% c	*% c	*% c	*% c	-%	*% c	*% c	1% c	1% c	-% c	-% c
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
50,000 - 499,999	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
500,000 - 4,999,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
5m+	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
191	44	5	136	187	174	187	167	191	-	122	187	74	56	14	119
12%	17% c	14% c	11% c	12% c	13% c	12% c	14% c	12% c	-%	14% ab	12% ab	21% ab	38% bc	6% bc	10% bc

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Table 11 (continuation)

Page 90

QV2b. And on average, how many parcels and packets does your organisation send per month? Again please think ONLY about the packets and parcels you may send as an organisation.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m+

Don't know

25+

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
1413	145	64	1193	966	447	1309	104	925	107	316	1070	268	6
88%	70%	61%	93%	88%	88%	87%	97%	89%	88%	80%	91%	71%	72%
			ab				a				a		
75	16	15	44	48	27	72	3	50	8	28	46	32	*
5%	8%	14%	3%	4%	5%	5%	3%	5%	7%	7%	4%	9%	6%
	c	c								b			
43	23	4	15	30	13	43	-	21	2	14	25	28	1
3%	11%	4%	1%	3%	3%	3%	-%	2%	2%	3%	2%	8%	16%
	bc												
43	12	8	22	30	13	43	-	25	4	20	21	29	-
3%	6%	8%	2%	3%	3%	3%	-%	2%	3%	5%	2%	8%	-%
	c	c								b			
18	4	10	4	12	6	18	-	9	*	12	5	10	*
1%	2%	9%	*%	1%	1%	1%	-%	1%	*%	3%	*%	3%	2%
	c	ac								b			
10	6	3	1	9	1	10	-	6	*	5	5	8	*
1%	3%	3%	*%	1%	*%	1%	-%	1%	*%	1%	*%	2%	4%
	c	c								b			
2	-	-	2	-	2	2	-	2	-	-	2	-	-
*%	-%	-%	*%	-%	*%	*%	-%	*%	-%	-%	*%	-%	-%
			a										
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
191	61	40	88	129	62	188	3	113	15	79	104	108	2
12%	30%	39%	7%	12%	12%	13%	3%	11%	12%	20%	9%	29%	28%
	c	c				b				b			

QV2b. And on average, how many parcels and packets does your organisation send per month? Again please think ONLY about the packets and parcels you may send as an organisation.

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

0 - 24

25 - 49

50 - 99

100 - 249

250 - 499

500 - 4,999

5,000 - 49,999

50,000 - 499,999

500,000 - 4,999,999

5m+

Don't know

25+

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1413	336	347	373	357
88%	86%	86%	91%	90%
			ab	
75	26	20	12	18
5%	7%	5%	3%	4%
	c			
43	12	11	10	11
3%	3%	3%	2%	3%
43	10	12	11	9
3%	2%	3%	3%	2%
18	6	9	2	1
1%	1%	2%	*%	*%
		cd		
10	2	2	3	3
1%	1%	1%	1%	1%
2	-	2	-	-
*%	-%	*%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
191	56	56	37	42
12%	14%	14%	9%	10%
	c	c		

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Table 12
QV3. Thinking about mail services, which providers can you think of?
Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Royal Mail

TNT

DHL

UPS

Parcellforce

FedEx

City Link Post

UK Mail

Interlink / Interlink
Express / Direct

Yodel

DPD

Hermes

DX

Tuffnells

APC

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1305	75	153	92	96	81	232	149	174	70	70	61	51	1123
81%	79%	87%	82%	82%	70%	84%	79%	83%	80%	81%	81%	80%	81%
	e	e	e	e	e	e	e	e	e	e	e	e	e
511	26	61	40	31	40	102	59	69	26	24	20	12	455
32%	28%	35%	36%	27%	35%	37%	31%	33%	29%	28%	26%	19%	33%
	l	l	l	l	l	kl	l	l	l	l	l	l	l
450	29	48	42	33	29	105	48	46	24	20	12	14	404
28%	31%	27%	38%	28%	25%	38%	26%	22%	27%	23%	16%	22%	29%
	k	k	hijkl	k		eghijklm	k		k				jkl
434	22	51	44	39	33	82	45	52	25	21	16	3	394
27%	23%	29%	39%	34%	29%	30%	24%	25%	28%	24%	21%	5%	29%
	l	l	aghi	kl	l	l	l	l	l	l	l		kl
335	19	33	33	29	19	57	37	42	20	19	19	8	289
21%	20%	19%	29%	25%	17%	21%	20%	20%	22%	22%	25%	13%	21%
			el	l						l	l		l
221	13	27	9	12	22	56	26	20	12	11	6	7	197
14%	13%	15%	8%	10%	19%	20%	14%	10%	14%	13%	7%	11%	14%
		k			chk	cdhiklm							k
176	22	14	5	13	7	39	24	28	10	7	6	2	161
11%	23%	8%	5%	11%	6%	14%	13%	13%	11%	8%	9%	3%	12%
	bcdeijkl m			l		cejl	l	l	l	l	l		l
124	11	22	5	3	8	35	11	11	10	3	4	1	116
8%	11%	12%	5%	3%	7%	13%	6%	5%	11%	4%	5%	2%	8%
	djl	djkl				dghijkl			djl				djl
78	5	5	4	8	4	22	11	11	1	1	4	*	72
5%	6%	3%	3%	7%	4%	8%	6%	5%	1%	1%	6%	*	5%
	l	l	l	jl	l	ijl	jl	jl			jl		jl
71	5	9	-	1	11	13	4	6	*	4	7	9	50
4%	6%	5%	-%	1%	9%	5%	2%	3%	*	4%	10%	15%	4%
	ci	ci			cdgim						cdtghijmbcdfghij	m	
67	6	4	5	5	7	15	4	9	4	5	1	3	58
4%	6%	2%	5%	4%	6%	5%	2%	4%	4%	6%	1%	4%	4%
	k		k	k	k	k				k			k
42	2	4	2	1	3	13	4	6	1	2	3	1	36
3%	2%	2%	2%	1%	2%	5%	2%	3%	1%	2%	4%	2%	3%
27	2	2	4	5	-	2	4	2	2	1	2	2	22
2%	2%	1%	3%	4%	-	1%	2%	1%	2%	1%	2%	3%	2%
				ef									
20	2	2	2	-	4	6	-	2	*	1	1	-	18
1%	2%	1%	2%	-%	4%	2%	-%	1%	*	1%	1%	-%	1%
					dgl								
19	-	5	*	1	1	4	-	7	-	2	-	-	18
1%	-%	3%	*%	1%	1%	1%	-%	3%	-%	2%	-%	-%	1%
		kl						gkl		kl			

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Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Business Post

Freight - Better / Night

Parcels to go

Local Courier

Parcel Line

Fastway Couriers

Lynx

Haynes

Priority Express

Pitney Bowes

AJG Parcels

One Post

Wey Group International

UK / British Mail

Global Mailing

Legal Post

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
17	-	-	2	1	3	*	4	4	1	*	*	1	15
1%	-%	-%	2%	1%	2%	1%	2%	2%	1%	1%	1%	2%	1%
15	4	*	2	-	1	2	2	2	3	-	-	-	15
1%	4%	1%	2%	-%	1%	1%	1%	1%	3%	-%	-%	-%	1%
11	djkl	4	-	-	-	2	-	2	1	-	1	*	9
1%	-	2%	-	-	-	1%	-	1%	1%	-	1%	1%	1%
10	-	-	4	4	-	2	-	-	-	1	-	*	9
1%	-	-	3%	3%	-	1%	-	-	-	1%	-	1%	1%
7	-	-	-	1	-	2	2	2	-	-	-	-	7
1%	-	-	-	1%	-	1%	1%	1%	-	-	-	-	1%
6	-	-	-	1	-	2	-	-	-	-	-	3	3
1%	-	-	-	1%	-	1%	-	-	-	-	-	5%	1%
6	2	-	2	1	-	-	-	-	-	*	*	-	5
1%	2%	-	2%	1%	-	-	-	-	-	1%	1%	-	1%
4	-	*	-	1	-	-	-	2	-	-	*	-	4
1%	-	1%	-	1%	-	-	-	1%	-	-	1%	-	1%
3	-	-	-	-	-	-	2	-	-	-	1	-	2
1%	-	-	-	-	-	-	1%	-	-	-	1%	-	1%
2	-	-	-	-	*	2	*	-	-	-	-	*	2
1%	-	-	-	-	1%	1%	1%	-	-	-	-	1%	1%
2	-	-	-	-	-	-	-	-	-	2	-	-	-
1%	-	-	-	-	-	-	-	-	-	3%	-	-	-
2	2	-	-	-	-	-	-	-	-	-	-	-	2
1%	2%	-	-	-	-	-	-	-	-	-	-	-	1%
2	-	-	-	-	-	2	-	-	-	-	-	-	2
1%	-	-	-	-	-	1%	-	-	-	-	-	-	1%
2	-	*	-	-	1	-	-	-	-	-	*	-	2
1%	-	1%	-	-	1%	-	-	-	-	-	1%	-	1%
1	-	-	-	-	1	-	*	-	-	-	-	-	1
1%	-	-	-	-	1%	-	1%	-	-	-	-	-	1%
1	-	-	-	-	-	-	-	-	-	1	-	-	-
1%	-	-	-	-	-	-	-	-	-	1%	-	-	-

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Table 12 (continuation)

Page 94

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Eagle Couriers

First Post

Fast Track

Neo Post

ENC

Euro

MHI (Mail Handling
International)

None

Don't know

Other answers

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
	95	176	112	117	116	278	189	209	88	87	75	63	1379
1	-	-	-	-	-	-	-	-	-	1	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
										m			
1	-	-	-	-	-	-	-	-	-	1	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
										m			
1	-	-	-	-	-	-	-	-	-	-	-	1	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%
												m	
1	-	-	-	*	*	*	-	-	-	-	-	-	1
*%	-%	-%	-%	*%	*%	*%	-%	-%	-%	-%	-%	-%	*%
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
										m			
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
										m			
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
7	2	-	-	-	-	2	*	2	-	1	*	-	6
*%	2%	-%	-%	-%	-%	1%	*%	1%	-%	1%	1%	-%	*%
14	-	-	*	-	3	-	-	6	-	*	1	3	9
1%	-%	-%	*%	-%	2%	-%	-%	3%	-%	1%	1%	5%	1%
					f			fgm				bdfgijm	
213	16	28	9	14	23	26	22	30	19	8	9	9	187
13%	17%	16%	8%	12%	20%	9%	12%	15%	21%	9%	12%	14%	14%
					cfj				cfjk				

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Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Royal Mail	1305 81%	1253 81%	32 82%	8 80%	5 75%	7 81%	52 81%	925 81%	380 82%	1256 81%	49 83%	912 82%	223 77%	93 89%	77 81%
TNT	511 32%	487 32%	14 37%	4 41%	3 43%	2 28%	24 37%	369 32%	142 31%	493 32%	18 30%	301 27%	107 37%	42 40%	61 64%
DHL	450 28%	428 28%	13 34%	3 30%	2 29%	3 37%	21 33%	346 30%	103 22%	427 28%	22 37%	295 27%	82 28%	43 41%	30 31%
UPS	434 27%	416 27%	12 30%	2 20%	2 30%	3 30%	18 29%	336 29%	98 21%	411 27%	23 39%	277 25%	79 27%	41 39%	37 39%
Parcellforce	335 21%	322 21%	9 22%	1 9%	2 31%	1 16%	13 20%	245 21%	90 19%	320 21%	15 25%	221 20%	63 22%	26 25%	26 27%
FedEx	221 14%	209 14%	8 21%	2 17%	1 18%	1 16%	12 19%	167 15%	54 12%	217 14%	4 7%	141 13%	41 14%	20 19%	18 19%
City Link Post	176 11%	169 11%	5 12%	1 7%	1 12%	1 8%	7 11%	116 10%	60 13%	173 11%	3 5%	105 9%	24 8%	19 18%	29 30%
UK Mail	124 8%	120 8%	2 5%	* 5%	1 16%	1 9%	4 6%	85 7%	39 8%	121 8%	3 5%	71 6%	22 7%	13 13%	18 19%
Interlink / Interlink Express / Direct	78 5%	74 5%	2 5%	* 3%	* 7%	* 4%	3 5%	50 4%	27 6%	77 5%	1 1%	39 4%	12 4%	14 13%	13 14%
Yodel	71 4%	67 4%	2 6%	* 1%	1 10%	* 1%	3 5%	40 4%	31 7%	70 5%	1 1%	50 4%	11 4%	7 6%	3 4%
DPD	67 4%	63 4%	2 6%	* 3%	1 9%	1 6%	4 6%	47 4%	19 4%	65 4%	2 4%	40 4%	12 4%	8 8%	7 7%
Hermes	42 3%	41 3%	* 1%	* 3%	- -	- -	1 1%	26 2%	16 3%	40 3%	2 3%	23 2%	9 3%	2 2%	7 8%
DX	27 2%	24 2%	2 4%	1 8%	* 4%	* 4%	3 5%	19 2%	8 2%	26 2%	* 1%	10 1%	11 4%	3 3%	3 3%
Tuffnells	20 1%	19 1%	1 1%	* 1%	- -	1 6%	1 2%	18 2%	3 1%	20 1%	1 1%	8 1%	4 1%	2 2%	6 6%
APC	19 1%	17 1%	2 4%	- -	- -	* 5%	2 3%	18 2%	1 *	19 1%	- -	6 *	5 2%	6 6%	3 3%
Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d		a	a	a	a	a	a	b	*	1	-	a	a	ab	a

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Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Business Post	17	17	*	-	-	*	*	14	4	17	*	12	1	*	4
	1%	1%	1%	-%	-%	4%	1%	1%	1%	1%	1%	1%	1%	1%	4%
						bf									abc
Freight - Better / Night	15	15	-	-	*	-	*	10	6	15	-	4	6	3	2
	1%	1%	-%	-%	5%	-%	1%	1%	1%	1%	-	1%	2%	3%	3%
					abf								a	a	a
Parcels to go	11	11	-	-	-	-	-	9	2	11	-	6	*	4	*
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-	1%	1%	4%	1%
														abd	
Local Courier	10	10	-	-	-	*	*	8	2	10	*	7	1	2	-
	1%	1%	-%	-%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	-
Parcel Line	7	7	-	-	-	-	-	5	2	7	-	4	-	1	2
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-	1%	-	1%	2%
															ab
Fastway Couriers	6	6	*	-	*	-	*	2	4	6	-	3	-	1	2
	1%	1%	1%	-%	2%	-%	1%	1%	1%	1%	-	1%	-	1%	3%
															ab
Lynx	6	6	-	-	-	-	-	6	-	6	-	6	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-	1%	-	1%	-	-	-
Haynes	4	4	*	-	-	-	*	3	1	4	*	2	-	2	*
	1%	1%	1%	-%	-%	-%	1%	1%	1%	1%	1%	1%	-	2%	1%
														ab	
Priority Express	3	2	*	*	-	-	*	3	-	3	-	*	2	*	-
	1%	1%	1%	1%	-%	-%	1%	1%	-	1%	-	1%	1%	1%	-
													a		
Pitney Bowes	2	2	1	*	-	-	1	2	*	2	*	*	2	-	*
	1%	1%	1%	1%	-%	-%	1%	1%	1%	1%	1%	1%	1%	-	1%
			a	a			a						a		
AJG Parcels	2	2	-	-	-	-	-	*	2	2	*	2	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	1%	1%	-	-	-
One Post	2	2	-	-	-	-	-	-	2	2	-	-	-	-	2
	1%	1%	-%	-%	-%	-%	-%	-	1%	1%	-	-	-	-	2%
									a						ab
Wey Group International	2	2	-	-	-	-	-	2	-	2	-	-	2	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-	1%	-	-	1%	-	-
													a		
UK / British Mail	2	1	-	-	-	*	*	2	*	1	*	*	1	-	-
	1%	1%	-%	-%	-%	5%	1%	1%	1%	1%	1%	1%	1%	-	-
						abf	a								
Global Mailing	1	1	*	-	-	-	*	1	-	1	-	1	-	-	*
	1%	1%	1%	-%	-%	-%	1%	1%	-	1%	-	1%	-	-	1%
Legal Post	1	1	*	-	*	-	*	1	*	1	*	1	-	*	*
	1%	1%	1%	-%	2%	-%	1%	1%	1%	1%	1%	1%	-	1%	1%
					a						a				
Eagle Couriers	1	1	*	-	-	-	*	1	-	1	*	-	*	1	-

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

First Post

Fast Track

Neo Post

ENC

Euro

MHI (Mail Handling International)

None

Don't know

Other answers

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1	*	*	-	-	-	*	1	-	1	-	*	-	-	*
*%	*%	*%	-%	-%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%
1	*	*	-	-	-	*	-	1	1	-	*	*	-	-
*%	*%	*%	-%	-%	-%	*%	-%	*%	*%	-%	*%	*%	-%	-%
1	-	1	-	-	-	1	*	*	*	*	*	-	*	*
*%	-%	1%	-%	-%	-%	1%	*%	*%	*%	*%	*%	-%	*%	*%
		a				a								
*	*	-	-	-	-	-	*	-	*	-	-	*	-	-
*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	-%	*%	-%	-%
*	*	-	-	-	-	-	*	-	*	-	*	-	-	-
*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	*%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
7	7	*	-	-	-	*	4	3	7	*	7	-	-	-
*%	*%	*%	-%	-%	-%	*%	*%	1%	*%	*%	1%	-%	-%	-%
14	13	-	-	*	*	*	8	5	13	1	11	3	-	*
1%	1%	-	-%	2%	2%	*%	1%	1%	1%	1%	1%	1%	-%	*%
					b									
213	206	4	1	1	1	7	153	59	206	7	141	37	17	18
13%	13%	11%	13%	9%	9%	11%	13%	13%	13%	12%	13%	13%	16%	18%

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Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Royal Mail	1305	580	254	195	177	67	24	8	1153	58	34	32	28	234	90	148	176
	81%	81%	82%	82%	81%	86%	84%	77%	82%	77%	79%	75%	93%	85%	73%	82%	81%
TNT	511	206	90	80	90	26	13	6	417	29	19	26	20	144	55	83	117
	32%	29%	29%	33%	41%	34%	45%	60%	30%	39%	44%	61%	66%	53%	45%	46%	54%
DHL	450	212	86	62	59	22	6	2	392	20	23	9	7	93	46	59	80
	28%	30%	28%	26%	27%	28%	21%	20%	28%	26%	53%	20%	22%	34%	38%	33%	37%
UPS	434	201	82	52	63	21	14	*	369	20	16	16	13	109	55	73	90
	27%	28%	26%	22%	29%	26%	48%	3%	26%	27%	38%	37%	44%	40%	45%	41%	42%
Parcellforce	335	145	67	52	45	16	8	2	295	12	10	12	6	85	22	59	48
	21%	20%	21%	22%	21%	21%	27%	17%	21%	16%	23%	29%	20%	31%	18%	33%	22%
FedEx	221	86	50	32	37	11	5	-	181	11	11	10	9	61	31	41	52
	14%	12%	16%	13%	17%	15%	16%	-%	13%	15%	24%	23%	29%	22%	26%	23%	24%
City Link Post	176	62	36	32	24	15	3	4	126	16	14	11	10	53	29	24	58
	11%	9%	12%	13%	11%	20%	11%	42%	9%	21%	31%	25%	34%	19%	24%	13%	27%
UK Mail	124	48	25	19	16	12	2	2	92	7	4	10	11	34	29	15	48
	8%	7%	8%	8%	7%	15%	8%	25%	7%	10%	9%	23%	37%	12%	23%	8%	22%
Interlink / Interlink Express / Direct	78	26	21	8	12	7	*	2	50	8	7	6	6	33	16	18	31
	5%	4%	7%	3%	6%	9%	1%	22%	4%	10%	17%	15%	22%	12%	13%	10%	14%
Yodel	71	37	9	9	11	3	2	*	62	*	3	4	1	15	10	11	15
	4%	5%	3%	4%	5%	3%	7%	3%	4%	1%	8%	10%	2%	6%	8%	6%	7%
DPD	67	22	17	11	8	6	3	-	56	3	*	4	3	25	8	15	18
	4%	3%	5%	5%	4%	8%	9%	-%	4%	5%	1%	10%	9%	9%	6%	9%	8%
Hermes	42	21	6	3	8	2	2	-	27	5	*	5	4	15	10	13	12
	3%	3%	2%	1%	4%	3%	8%	-%	2%	7%	1%	13%	12%	6%	8%	7%	6%
DX	27	4	1	8	5	6	3	*	22	1	3	1	*	10	6	10	6
	2%	*%	*%	3%	2%	7%	10%	2%	2%	1%	6%	2%	2%	4%	5%	6%	3%
Tuffnells	20	5	5	2	2	6	-	-	15	1	-	2	2	7	5	5	8
	1%	1%	2%	1%	1%	8%	-%	-%	1%	1%	-%	4%	7%	3%	4%	3%	4%
APC	19	1	4	6	5	4	*	-	15	*	2	2	*	9	3	4	7
	1%	*%	1%	3%	2%	5%	1%	-%	1%	*%	5%	5%	1%	3%	2%	2%	3%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Business Post	17	8	2	1	2	2	1	-	12	*	3	2	-	3	4	1	6
	1%	1%	1%	1%	1%	2%	5%	-%	1%	1%	7%	5%	-%	1%	3%	1%	3%
							abcd				ab	ab					
Freight - Better / Night	15	4	5	3	1	1	*	-	7	-	6	2	-	5	6	5	6
	1%	1%	2%	1%	1%	2%	1%	-%	1%	-%	14%	5%	-%	2%	5%	3%	3%
							abc				abe	ab					
Parcels to go	11	6	-	-	5	-	-	-	10	-	-	*	-	2	1	2	1
	1%	1%	-%	-%	2%	-%	-%	-%	1%	-%	-%	1%	-%	1%	1%	1%	1%
					bc												
Local Courier	10	5	2	3	*	1	-	-	9	1	-	-	-	3	1	3	1
	1%	1%	1%	1%	1%	2%	-%	-%	1%	2%	-%	-%	-%	1%	1%	2%	1%
Parcel Line	7	4	-	1	2	-	-	-	7	-	-	-	-	-	-	-	-
	1%	1%	-%	1%	1%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	6	*	1	1	1	2	*	-	4	*	-	-	2	2	2	2	2
	1%	1%	1%	1%	1%	2%	1%	-%	1%	1%	-%	-%	8%	1%	1%	1%	1%
					a							abcd					
Lynx	6	4	*	1	*	-	-	-	5	-	-	*	-	-	-	-	-
	1%	1%	1%	1%	1%	-%	-%	-%	1%	-%	-%	1%	-%	-%	-%	-%	-%
Haynes	4	1	2	-	-	1	-	-	*	2	-	1	*	4	-	3	1
	1%	1%	1%	-%	-%	1%	-%	-%	1%	3%	-%	3%	1%	2%	-%	2%	1%
									a			a	a				
Priority Express	3	-	2	*	*	-	-	-	1	2	-	-	-	1	2	1	2
	1%	-%	1%	1%	1%	-%	-%	-%	1%	2%	-%	-%	-%	1%	1%	1%	1%
			a							a							
Pitney Bowes	2	-	*	*	2	*	*	-	2	-	-	-	-	-	-	-	-
	1%	-%	1%	1%	1%	1%	1%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
					a		a										
AJG Parcels	2	2	*	-	-	-	-	-	2	-	-	-	-	-	-	-	-
	1%	1%	1%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	2	-	-	-	-	-	-	2	-	-	2	-	-	2	-	2	-
	1%	-%	-%	-%	-%	-%	-%	18%	-%	-%	4%	-%	-%	1%	-%	1%	-%
											ab						
Wey Group International	2	-	-	2	-	-	-	-	2	-	-	-	-	-	2	-	2
	1%	-%	-%	1%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	1%	-%	1%
				a										a			
UK / British Mail	2	*	*	-	-	1	-	-	*	-	1	-	-	*	1	*	1
	1%	1%	1%	-%	-%	2%	-%	-%	1%	-%	3%	-%	-%	1%	1%	1%	1%
					ad						a						
Global Mailing	1	-	-	-	1	-	*	-	1	-	-	-	*	1	-	1	-
	1%	-%	-%	-%	1%	-%	1%	-%	1%	-%	-%	-%	1%	1%	-%	1%	-%
Legal Post	1	*	-	-	-	*	*	*	1	-	-	*	-	*	1	*	1
	1%	1%	-%	-%	-%	1%	1%	1%	1%	-%	-%	1%	-%	1%	1%	1%	1%
Eagle Couriers	1	-	-	*	-	*	*	-	*	*	*	-	-	*	-	*	-

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Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
First Post	1	-	-	-	-	*	*	-	*	-	-	*	-	-	1	-	1
	%	-%	-%	-%	-%	1%	*%	-%	*%	-%	-%	*%	-%	-%	*%	-%	*%
Fast Track	1	-	1	-	-	-	-	-	1	-	-	-	-	-	-	-	-
	%	-%	*%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	1	-	-	-	*	*	*	-	1	-	-	-	-	-	-	-	-
	%	-%	-%	-%	*%	*%	1%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%
						a											
ENC	*	-	-	*	-	-	-	-	-	*	-	-	-	*	-	*	-
	%	-%	-%	*%	-%	-%	-%	-%	-%	1%	-%	-%	-%	*%	-%	*%	-%
										a							
Euro	*	-	-	-	*	-	-	-	-	*	-	-	-	-	-	-	-
	%	-%	-%	-%	*%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%
										a							
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	7	7	-	-	-	-	-	-	7	-	-	-	-	-	-	-	-
	*%	1%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	14	9	*	3	*	*	-	*	11	2	-	-	*	-	-	-	-
	1%	1%	*%	1%	*%	1%	-%	1%	1%	3%	-%	-%	*%	-%	-%	-%	-%
										a							
Other answers	213	82	50	29	40	6	6	*	173	23	3	5	8	55	26	37	44
	13%	11%	16%	12%	19%	7%	19%	3%	12%	31%	8%	12%	27%	20%	21%	21%	20%
			ae		ae		ae			acd			ac				

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 101

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Royal Mail	1305	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
	81%	663	223	412	1206	765	1226	582	311	1032	536	1213	196	1002	904
		82%	79%	83%	82%	85%	82%	80%	82%	81%	80%	82%	84%	84%	84%
		df													
TNT	511	258	81	170	471	295	480	285	128	412	259	470	101	379	359
	32%	32%	29%	34%	32%	33%	32%	39%	34%	32%	39%	32%	43%	32%	33%
							abcf				b		b		
DHL	450	239	89	118	407	263	420	225	84	350	208	413	83	332	299
	28%	30%	32%	24%	28%	29%	28%	31%	22%	28%	31%	28%	36%	28%	28%
		c	c		e	e	e	e		e			b		
UPS	434	215	78	139	403	245	412	233	98	337	218	404	90	341	288
	27%	27%	28%	28%	27%	27%	27%	32%	26%	27%	33%	27%	38%	29%	27%
							abcef				b		b		
Parcellforce	335	173	65	97	303	191	308	192	83	258	162	313	58	244	225
	21%	21%	23%	19%	20%	21%	21%	26%	22%	20%	24%	21%	25%	20%	21%
							abcf								
FedEx	221	98	39	80	204	125	207	121	53	182	114	205	60	171	143
	14%	12%	14%	16%	14%	14%	14%	17%	14%	14%	17%	14%	25%	14%	13%
				a									ab		
City Link Post	176	89	30	56	164	100	166	111	48	137	93	163	27	113	138
	11%	11%	11%	11%	11%	11%	11%	15%	13%	11%	14%	11%	12%	9%	13%
							abcf						a		a
UK Mail	124	62	21	39	118	64	118	72	41	97	58	114	17	87	88
	8%	8%	8%	8%	8%	7%	8%	10%	11%	8%	9%	8%	7%	7%	8%
							b	bf							
Interlink / Interlink Express / Direct	78	39	13	25	73	41	73	57	20	65	39	76	11	45	64
	5%	5%	5%	5%	5%	5%	5%	8%	5%	5%	6%	5%	5%	4%	6%
							abcf							a	a
Yodel	71	38	16	17	65	34	67	31	17	56	37	66	13	44	48
	4%	5%	6%	3%	4%	4%	4%	4%	4%	4%	5%	4%	6%	4%	4%
DPD	67	33	13	21	61	32	61	38	11	49	32	61	8	51	44
	4%	4%	5%	4%	4%	4%	4%	5%	3%	4%	5%	4%	3%	4%	4%
							e								
Hermes	42	17	6	20	37	22	38	29	11	32	26	37	7	30	31
	3%	2%	2%	4%	3%	2%	3%	4%	3%	3%	4%	3%	3%	3%	3%
			a												
DX	27	6	3	18	26	24	27	12	10	21	13	26	4	23	21
	2%	1%	1%	4%	2%	3%	2%	2%	3%	2%	2%	2%	2%	2%	2%
			ab												
Tuffnells	20	10	4	6	17	10	17	17	8	17	14	17	2	11	15
	1%	1%	2%	1%	1%	1%	1%	2%	2%	1%	2%	1%	1%	1%	1%
							abc								
APC	19	8	4	7	19	12	19	18	14	19	15	19	5	13	14
	1%	1%	1%	1%	1%	1%	1%	2%	4%	2%	2%	1%	2%	1%	1%
							ac	abcf							

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

Ofcom: Business Postal Tracker

Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Business Post	17	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
	1%	12	*	4	14	12	16	9	2	15	8	16	2	14	9
		1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
		b													
Freight - Better / Night	15	4	4	7	15	14	15	12	2	14	14	15	4	12	14
	1%	1%	1%	1%	1%	2%	1%	2%	1%	1%	2%	1%	2%	1%	1%
Parcels to go	11	6	2	2	9	8	9	10	4	6	10	9	1	8	7
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
								f							
Local Courier	10	7	4	*	9	6	9	7	4	10	8	9	3	8	9
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
		c	c												
Parcel Line	7	4	2	1	7	3	7	3	2	5	3	7	1	5	5
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Fastway Couriers	6	1	1	4	6	4	6	4	3	6	4	5	1	3	5
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
				a											
Lynx	6	5	-	*	6	2	6	*	-	4	2	6	2	6	4
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Haynes	4	-	2	2	4	4	4	4	2	3	4	4	-	4	4
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
			a												
Priority Express	3	*	-	2	3	2	3	3	1	3	1	3	1	2	3
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Pitney Bowes	2	*	*	2	2	2	2	2	1	2	1	2	*	*	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
AJG Parcels	2	1	-	1	2	1	2	1	*	2	1	2	-	1	1
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
One Post	2	-	-	2	2	2	2	2	-	2	-	2	-	-	2
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Wey Group International	2	-	-	2	2	2	2	2	-	2	2	2	-	2	2
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
UK / British Mail	2	*	1	-	2	1	2	1	1	2	2	*	*	*	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Global Mailing	1	1	-	*	1	*	1	*	*	1	*	1	1	1	1
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Legal Post	1	*	1	*	1	1	1	*	1	1	*	1	*	1	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Eagle Couriers	1	-	*	1	1	1	1	1	1	1	1	1	-	1	1
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
First Post	1	-	*	*	1	1	1	*	*	1	*	1	-	1	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 103

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Fast Track

Neo Post

ENC

Euro

MHI (Mail Handling
International)

None

Don't know

Other answers

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
Fast Track	1	*	*	1	1	1	-	*	*	1	1	*	1	1
*%	-%	*%	*%	*%	*%	*%	-%	*%	*%	*%	*%	*%	*%	*%
Neo Post	1	*	*	1	1	1	*	*	1	*	1	-	*	*
*%	*%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	-%	*%	*%
ENC	*	-	*	*	*	*	*	*	*	*	*	-	*	*
*%	-%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	-%	*%	*%
Euro	*	*	-	*	-	*	-	-	-	-	*	-	*	-
*%	*%	-%	-%	*%	-%	*%	-%	-%	-%	-%	*%	-%	*%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	7	-	*	6	-	6	-	-	4	*	6	-	6	*
*%	1%	-%	*%	*%	-%	*%	-%	-%	*%	*%	*%	-%	1%	*%
	c			b		b							b	
Don't know	14	1	5	12	5	13	*	3	10	3	13	1	9	9
1%	1%	*%	1%	1%	1%	1%	*%	1%	1%	*%	1%	*%	1%	1%
				d		d		d	d					
Other answers	213	38	72	203	129	204	108	56	174	105	206	38	158	153
13%	100	14%	14%	14%	14%	14%	15%	15%	14%	16%	14%	16%	13%	14%

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Table 12 (continuation)

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QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Royal Mail	1305	209	31	1063	1270	1099	1277	971	1298	-	727	1281	277	116	188	998
	81%	80%	85%	83%	81%	82%	81%	81%	81%	-	81%	82%	78%	80%	79%	82%
TNT	511	81	14	407	500	456	502	407	509	-	324	502	160	58	90	361
	32%	31%	39%	32%	32%	34%	32%	34%	32%	-	36%	32%	45%	39%	38%	30%
											b		ab	c	c	
DHL	450	59	11	373	439	396	440	356	444	2	285	440	132	46	70	330
	28%	23%	30%	29%	28%	29%	28%	30%	28%	100%	32%	28%	37%	32%	29%	27%
				a							b		b			
UPS	434	60	17	354	424	375	428	362	432	-	283	429	133	49	56	327
	27%	23%	49%	28%	27%	28%	27%	30%	27%	-	32%	27%	37%	34%	23%	27%
			ac								b		ab	b		
Parcellforce	335	60	6	255	325	296	326	269	334	-	219	326	83	36	54	245
	21%	23%	17%	20%	21%	22%	21%	22%	21%	-	24%	21%	23%	24%	23%	20%
											b					
FedEx	221	41	7	175	215	189	217	185	221	-	153	217	76	29	27	164
	14%	16%	19%	14%	14%	14%	14%	15%	14%	-	17%	14%	21%	20%	11%	14%
											b		b	bc		
City Link Post	176	35	6	135	173	172	176	153	176	-	119	174	44	26	20	130
	11%	13%	17%	10%	11%	13%	11%	13%	11%	-	13%	11%	12%	18%	9%	11%
														bc		
UK Mail	124	19	7	96	122	111	122	110	124	-	76	122	29	28	14	82
	8%	7%	19%	7%	8%	8%	8%	9%	8%	-	9%	8%	8%	19%	6%	7%
			ac											bc		
Interlink / Interlink Express / Direct	78	12	2	61	76	68	76	64	78	-	49	76	21	14	5	59
	5%	4%	5%	5%	5%	5%	5%	5%	5%	-	6%	5%	6%	10%	2%	5%
														bc		
Yodel	71	12	*	54	66	61	68	52	70	-	43	67	19	9	9	52
	4%	5%	1%	4%	4%	4%	4%	4%	4%	-	5%	4%	5%	6%	4%	4%
DPD	67	13	2	52	67	50	67	56	67	-	39	65	17	10	7	49
	4%	5%	7%	4%	4%	4%	4%	5%	4%	-	4%	4%	5%	7%	3%	4%
Hermes	42	11	1	31	41	38	41	33	42	-	31	41	12	8	2	32
	3%	4%	4%	2%	3%	3%	3%	3%	3%	-	3%	3%	3%	5%	1%	3%
														b		
DX	27	4	2	18	27	27	27	17	27	-	10	27	4	3	3	21
	2%	2%	6%	1%	2%	2%	2%	1%	2%	-	1%	2%	1%	2%	1%	2%
			c													
Tuffnells	20	2	-	18	20	20	20	18	20	-	14	20	7	4	1	16
	1%	1%	-	1%	1%	2%	1%	1%	1%	-	2%	1%	2%	3%	1%	1%
														b		
APC	19	*	-	18	19	19	19	16	19	-	13	19	7	2	1	17
	7%	1%	-	1%	1%	1%	1%	1%	1%	-	1%	1%	2%	2%	1%	1%
Business Post	17	2	-	13	16	16	16	14	17	-	9	16	4	2	1	14
	1%	1%	-	1%	1%	1%	1%	1%	1%	-	1%	1%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 105

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%																
Unweighted total	1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Weighted total	1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
		261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Freight - Better / Night	15	3	-	11	15	14	15	15	15	-	15	15	2	*	5	10
	7%	1%	-%	1%	1%	1%	1%	1%	1%	-%	2%	1%	1%	-%	2%	1%
Parcels to go	11	3	2	8	11	11	11	9	11	-	8	11	4	3	*	8
	7%	1%	5%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	2%	-%	1%
			c													
Local Courier	10	2	-	9	9	9	9	10	10	-	10	10	3	-	3	7
	7%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%
Parcel Line	7	-	-	7	7	7	7	3	7	-	3	7	3	1	-	6
	-%	-%	-%	1%	-%	1%	-%	-%	-%	-%	-%	-%	1%	1%	-%	-%
Fastway Couriers	6	2	-	4	6	6	6	6	6	-	3	6	1	2	1	3
	-%	1%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	2%	-%	-%
														c		
Lynx	6	*	-	5	6	6	6	4	6	-	3	6	3	-	*	5
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
Haynes	4	3	-	2	4	4	4	4	4	-	4	4	2	-	*	4
	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
		c														
Priority Express	3	*	-	2	3	3	3	3	3	-	*	3	1	*	*	2
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Pitney Bowes	2	*	-	*	2	2	2	1	2	-	1	2	1	-	*	2
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
AJG Parcels	2	*	-	2	2	2	2	2	2	-	2	2	1	-	*	2
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	2	-	-	2	2	2	2	2	2	-	-	-	-	2	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%
														c		
Wey Group International	2	-	-	2	2	2	2	2	2	-	2	2	2	2	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	1%	-%	-%
														c		
UK / British Mail	2	-	-	2	2	1	2	1	2	-	*	2	*	-	-	2
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	1	1	1	*	1	1	1	1	1	-	1	1	1	-	1	*
	-%	-%	4%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%
		c	c												c	
Legal Post	1	1	-	*	1	1	1	1	1	-	1	1	1	-	*	1
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	1	*	*	*	1	1	1	1	1	-	1	1	-	-	*	1
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
First Post	1	*	-	*	1	1	1	*	1	-	1	1	1	*	*	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 106

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Fast Track

Neo Post

ENC

Euro

MHI (Mail Handling
International)

None

Don't know

Other answers

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
1	-	-	1	1	1	1	1	1	-	1	1	*	-	-	1
%	-%	-%	%	%	%	%	%	%	-%	%	%	%	-%	-%	%
1	-	-	*	1	1	1	*	1	-	*	1	-	-	-	1
%	-%	-%	%	%	%	%	%	%	-%	%	%	-%	-%	-%	%
*	-	-	*	*	-	*	*	*	-	*	*	-	-	-	*
%	-%	-%	%	%	-%	%	%	%	-%	%	%	-%	-%	-%	%
*	-	-	*	*	-	*	-	*	-	-	*	-	-	-	*
%	-%	-%	%	%	-%	%	-%	%	-%	-%	%	-%	-%	-%	%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
7	-	-	7	7	6	7	4	7	-	2	7	2	-	2	5
%	-%	-%	1%	%	%	%	%	%	-%	%	%	1%	-%	1%	%
14	-	*	13	11	9	11	9	14	-	1	11	*	3	*	11
1%	-%	1%	1%	1%	1%	1%	1%	1%	-%	%	1%	%	2%	%	1%
213	48	2	157	210	185	210	178	213	-	139	211	52	21	27	164
13%	19%	5%	12%	13%	14%	13%	15%	13%	-%	15%	13%	14%	14%	11%	14%
	c										a				

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 107

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Royal Mail	1305	156	82	1055	881	424	1233	72	863	102	313	979	296	3
	81%	76%	79%	82% a	80%	83%	82% b	67%	83%	83%	79%	83%	79%	35%
TNT	511	92	52	364	362	149	487	24	318	47	134	366	185	1
	32%	45% c	51% c	28%	33%	29%	33% b	22%	31%	39%	34%	31%	49%	11%
DHL	450	69	34	340	316	134	425	25	294	28	124	316	125	3
	28%	34% c	33%	27%	29%	26%	28%	23%	28%	23%	31%	27%	33%	40%
UPS	434	84	47	298	290	144	417	17	282	40	131	294	140	8
	27%	41% c	45% c	23%	26%	28%	28% b	15%	27%	32%	33% b	25%	37%	96%
Parcellforce	335	51	27	257	235	99	321	13	215	32	77	243	102	2
	21%	25%	26%	20%	21%	20%	21% b	13%	21%	26%	20%	21%	27%	30%
FedEx	221	44	27	148	142	79	213	8	147	11	73	145	87	2
	14%	21% c	26% c	12%	13%	16%	14%	8%	14%	9%	19% b	12%	23%	22%
City Link Post	176	39	29	107	111	65	170	7	112	14	53	120	75	2
	11%	19% c	28% c	8%	10%	13%	11% b	6%	11%	11%	13%	10%	20%	30%
UK Mail	124	28	13	82	92	32	119	5	81	4	32	88	60	1
	8%	13% c	12% c	6%	8%	6%	8%	4%	8%	4%	8%	8%	16%	8%
Interlink / Interlink Express / Direct	78	22	15	40	56	22	77	*	54	3	19	55	48	-
	5%	11% c	14% c	3%	5%	4%	5% b	1%	5%	2%	5%	5%	13%	-%
Yodel	71	16	7	47	42	28	68	3	48	3	17	50	24	*
	4%	8% c	7%	4%	4%	6%	5%	3%	5%	2%	4%	4%	6%	2%
DPD	67	16	10	40	48	18	64	2	45	6	19	47	31	-
	4%	8% c	10% c	3%	4%	4%	4%	2%	4%	5%	5%	4%	8%	-%
Hermes	42	12	9	20	28	14	42	-	32	2	13	29	21	-
	3%	6% c	9% c	2%	3%	3%	3%	-%	3%	1%	3%	2%	6%	-%
DX	27	4	1	21	19	7	25	1	16	1	6	19	17	1
	2%	2% c	1%	2%	2%	1%	2%	1%	2%	1%	1%	2%	4%	16%
Tuffnells	20	7	2	12	13	7	20	*	18	2	4	16	12	-
	1%	3% c	2%	1%	1%	1%	1%	1%	2%	1%	1%	1%	3%	-%
APC	19	6	4	9	15	4	19	*	12	2	5	14	12	-
	1%	3% c	4% c	1%	1%	1%	1%	1%	1%	1%	1%	1%	3%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 108

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Business Post	17	5	-	12	10	7	17	-	8	-	3	13	6	-
	1%	3%	-%	1%	1%	1%	1%	-%	1%	-%	1%	1%	2%	-%
Freight - Better / Night	15	10	4	2	14	2	15	-	6	2	4	10	8	2
	1%	5%	3%	0%	1%	0%	1%	0%	1%	1%	1%	1%	2%	22%
Parcels to go	11	1	4	6	8	3	11	-	6	-	3	8	3	-
	1%	0%	4%	0%	1%	1%	1%	0%	1%	0%	1%	1%	1%	0%
Local Courier	10	2	-	8	8	2	10	-	2	2	4	7	3	2
	1%	1%	0%	1%	1%	0%	1%	0%	0%	1%	1%	1%	1%	22%
Parcel Line	7	1	-	6	5	2	7	-	4	1	-	7	-	-
	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%
Fastway Couriers	6	2	-	4	4	2	6	0	4	2	1	5	4	-
	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%
Lynx	6	1	-	5	5	1	5	1	3	1	-	6	-	-
	0%	1%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%
Haynes	4	1	0	3	3	1	4	-	4	0	1	3	2	-
	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Priority Express	3	0	-	2	0	2	3	-	0	2	1	2	2	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%
Pitney Bowes	2	-	0	2	0	2	2	-	0	-	0	0	2	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
AJG Parcels	2	-	-	2	1	1	2	-	2	-	-	2	-	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
One Post	2	2	-	-	-	2	2	-	2	-	-	2	2	-
	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Wey Group International	2	2	-	-	2	-	2	-	2	-	2	-	2	-
	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
UK / British Mail	2	-	-	2	2	-	2	-	0	1	1	0	2	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
Global Mailing	1	-	-	1	1	-	1	-	1	-	-	1	1	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Legal Post	1	1	0	-	0	1	1	-	0	0	0	1	1	-
	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Eagle Couriers	1	-	0	1	1	0	1	-	1	-	-	1	0	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 109

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
		a	b	c	a	b	a	b	a	b	a	b	a	b
Significance Level: 95%	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Unweighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Weighted total														
First Post	1	1	-	-	*	*	1	-	-	1	*	*	1	-
	*%	*%	-%	-%	*%	*%	*%	-%	-%	*%	*%	*%	*%	-%
										a				
Fast Track	1	-	-	1	1	-	1	-	*	-	*	*	-	-
	*%	-%	-%	*%	*%	-%	*%	-%	*%	-%	*%	*%	-%	-%
Neo Post	1	*	-	*	1	-	1	-	*	*	*	*	*	-
	*%	*%	-%	*%	*%	-%	*%	-%	*%	*%	*%	*%	*%	-%
ENC	*	-	*	-	*	-	*	-	-	-	-	*	-	*
	*%	-%	*%	-%	*%	-%	*%	-%	-%	-%	-%	*%	-%	6%
			c											
Euro	*	-	-	*	-	*	*	-	*	-	-	*	-	-
	*%	-%	-%	*%	-%	*%	*%	-%	*%	-%	-%	*%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	7	-	2	5	5	3	6	1	5	2	-	7	*	-
	*%	-%	2%	*%	*%	1%	*%	1%	*%	1%	-%	1%	*%	-%
			ac											
Don't know	14	-	-	14	5	8	10	4	6	4	5	9	-	-
	1%	-%	-%	1%	*%	2%	1%	4%	1%	4%	1%	1%	-%	-%
						a		a		a				
Other answers	213	42	17	153	138	74	198	15	129	23	78	129	75	1
	13%	20%	17%	12%	13%	15%	13%	14%	12%	19%	20%	11%	20%	8%
		c									b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 110

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Royal Mail

TNT

DHL

UPS

Parcelforce

FedEx

City Link Post

UK Mail

 Interlink / Interlink
Express / Direct

Yodel

DPD

Hermes

DX

Tuffnells

APC

Business Post

Freight - Better / Night

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1305	338	341	322	304
81%	86%	85%	79%	76%
	cd	cd		
511	121	137	150	102
32%	31%	34%	37%	26%
		d		
450	105	110	120	115
28%	27%	27%	29%	29%
434	92	119	113	109
27%	24%	30%	28%	27%
335	87	65	101	82
21%	22%	16%	25%	21%
	b			
221	40	72	55	54
14%	10%	18%	13%	14%
		a		
176	45	53	37	42
11%	11%	13%	9%	10%
124	27	32	35	31
8%	7%	8%	9%	8%
78	23	18	22	16
5%	6%	4%	5%	4%
71	12	16	20	23
4%	3%	4%	5%	6%
				a
67	7	19	17	24
4%	2%	5%	4%	6%
		a		a
42	11	6	8	16
3%	3%	2%	2%	4%
				b
27	14	4	2	7
2%	4%	1%	*%	2%
	bc			
20	4	9	5	3
1%	1%	2%	1%	1%
19	6	5	6	3
1%	1%	1%	2%	1%
17	2	2	4	10
1%	*%	*%	1%	2%
				ab
15	6	-	4	5
1%	2%	-%	1%	1%
	b		b	b

Ofcom: Business Postal Tracker

Table 12 (continuation)

Page 111

QV3. Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Parcels to go

Local Courier

Parcel Line

Fastway Couriers

Lynx

Haynes

Priority Express

Pitney Bowes

AJG Parcels

One Post

Wey Group International

UK / British Mail

Global Mailing

Legal Post

Eagle Couriers

First Post

Fast Track

Neo Post

ENC

Euro

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
11	*	-	3	8
1%	*%	-%	1%	2%
				ab
10	6	4	-	*
1%	1%	1%	-%	*%
	cd	c		
7	-	-	6	1
*%	-%	-%	1%	*%
			ab	
6	2	*	1	3
*%	*%	*%	*%	1%
6	2	2	2	-
*%	*%	1%	*%	-%
4	2	2	-	-
*%	1%	1%	-%	-%
3	2	-	*	*
*%	*%	-%	*%	*%
2	*	*	2	-
*%	*%	*%	*%	-%
2	-	-	1	1
*%	-%	-%	*%	*%
2	2	-	-	-
*%	*%	-%	-%	-%
2	2	-	-	-
*%	*%	-%	-%	-%
2	2	*	-	-
*%	*%	*%	-%	-%
1	1	-	-	-
*%	*%	-%	-%	-%
1	*	1	-	-
*%	*%	*%	-%	-%
1	*	-	-	1
*%	*%	-%	-%	*%
1	*	*	-	-
*%	*%	*%	-%	-%
1	1	-	-	-
*%	*%	-%	-%	-%
1	*	-	*	-
*%	*%	-%	*%	-%
*	*	-	-	-
*%	*%	-%	-%	-%
*	*	-	-	-
*%	*%	-%	-%	-%

Produced by OLR

OFC1885

Issue date: 03/07/13

QV3: Thinking about mail services, which providers can you think of?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

MHI (Mail Handling

International)

None

Don't know

Other answers

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
	-	-	-	-
-%	-%	-%	-%	-%
7	-	-	2	5
*%	-%	-%	1%	1%
				ab
14	-	6	3	5
1%	-%	1%	1%	1%
		a		a
213	41	78	43	51
13%	10%	19%	11%	13%
		acd		

QV4. And who does your organisation use for its mail service?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Royal Mail

TNT

Parcellforce

DHL

UPS

FedEx

UK Mail

APC

Interlink / Interlink
Express / Direct

Hermes

City Link Post

DX

Local Courier

Pitney Bowes

Freight - Better / Night

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	66	106	78	119	114	205	131	117	87	214	193	174	1023
Weighted total	95	176	112	117	116	278	189	209	88	87	75	63	1379
Royal Mail	1570	95	172	110	114	109	274	185	204	87	84	73	62
98%	100%	97%	98%	98%	94%	98%	98%	98%	98%	97%	97%	99%	98%
TNT	77	6	14	5	3	7	18	6	9	4	4	1	*
5%	6%	8%	5%	3%	6%	6%	3%	4%	4%	4%	1%	1%	72
Parcellforce	49	kl	kl	kl	kl	kl	kl	l	l	kl			kl
3%	4%	5%	7%	3%	4%	7%	5%	7%	3%	2%	2%	1%	45
DHL	44	2	7	2	1	4	14	4	2	4	2	*	2
3%	2%	4%	2%	1%	4%	5%	2%	1%	4%	2%	1%	4%	40
UPS	43	4	7	4	3	3	13	2	1	4	1	-	40
3%	4%	4%	3%	3%	3%	5%	1%	1%	5%	1%	2%	-	3%
FedEx	39	4	2	4	3	6	6	*	9	3	1	1	37
2%	4%	1%	3%	3%	5%	2%	2%	4%	4%	1%	1%	1%	3%
UK Mail	31	g	9	2	1	6	*	5	g	4	1	1	29
2%	4%	4%	2%	1%	1%	2%	2%	2%	4%	1%	2%	-	2%
APC	23	gl	gl	-	-	4	4	-	6	4	1	1	21
1%	-	3	-	-	4	1%	1%	-	3%	4%	1%	-	2%
Interlink / Interlink Express / Direct	21	-	*	*	5	1	2	7	*	1	*	3	18
1%	-	2%	2%	4%	1%	1%	1%	4%	2%	1%	2%	4%	1%
Hermes	20	4	2	-	1	1	4	2	4	1	*	*	19
1%	4%	1%	-	1%	1%	1%	1%	1%	2%	1%	1%	-	1%
City Link Post	19	jl	2	2	1	1	2	-	6	1	2	1	16
1%	-	1%	2%	1%	1%	1%	1%	-	3%	1%	2%	-	1%
DX	18	-	2	*	3	-	-	6	2	*	2	1	14
1%	-	1%	2%	3%	3%	-	-	3%	1%	2%	2%	1%	1%
Local Courier	9	-	-	-	3	-	2	2	-	-	2	1	6
1%	-	-	-	2%	2%	-	1%	1%	-	-	2%	1%	1%
Pitney Bowes	8	-	-	2	1	-	2	2	-	-	*	*	7
1%	-	-	2%	1%	-	1%	1%	1%	-	-	1%	1%	1%
Freight - Better / Night	7	2	-	-	-	2	2	2	-	-	-	-	7
1%	2%	-	-	-	-	1%	1%	1%	-	-	-	-	1%

Ofcom: Business Postal Tracker

Table 13 (continuation)

Page 114

QV4. And who does your organisation use for its mail service?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Wey Group International

Tuffnells

DPD

Parcels to go

Priority Express

One Post

Legal Post

Fastway Couriers

Haynes

Neo Post

First Post

ENC

AJG Parcels

Eagle Couriers

Yodel

Global Mailing

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
7	-	-	-	-	-	7	-	-	-	-	-	-	7
*%	-%	-%	-%	-%	-%	3%	-%	-%	-%	-%	-%	-%	1%
4	*	-	-	-	*	4	-	-	*	-	*	-	4
*%	*%	-%	-%	-%	*%	1%	-%	-%	*%	-%	*%	-%	*%
4	-	2	-	-	-	*	-	1	-	-	-	1	3
*%	-%	1%	-%	-%	-%	*%	-%	*%	-%	-%	-%	1%	*%
4	2	-	-	-	-	-	-	-	1	-	1	-	3
*%	2%	-%	-%	-%	-%	-%	-%	-%	1%	-%	1%	-%	*%
2	fjm	-	-	-	-	-	-	-	m	-	m	-	-
*%	-%	-%	-%	-%	-%	-%	2	-	-	-	*	-	2
2	2	-	-	-	-	-	1	-	-	-	1	-%	*%
*%	2%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-	2
1	fjm	-	-	-	-	-	-	-	-	-	-	-	2
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1	-	-	*%
1	-	-	-	-	-	-	-	-	-	1	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
1	-	-	-	-	-	-	-	-	-	-	-	1	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	2%	-%
1	-	*	-	-	-	-	-	-	-	-	*	-	*
*%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	*%
1	-	-	-	-	-	*	-	-	-	*	-	-	*
*%	-%	-%	-%	-%	-%	*%	-%	-%	-%	1%	-%	-%	*%
1	-	-	-	-	-	-	-	-	-	m	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
*	-	-	-	-	-	-	-	-	-	m	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
*	-	-	-	-	-	-	-	-	-	m	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
*	-	-	-	-	-	-	*	-	-	-	-	-	*
*%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	*%
*	-	-	-	-	-	-	-	-	-	-	-	-	*
*%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	*%

Base: All respondents

Produced by OLR
OFC1885
Issue date: 03/07/13

Ofcom: Business Postal Tracker

Table 13 (continuation)

Page 116

QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Royal Mail	1570	1507	38	10	7	8	62	1115	455	1511	58	1082	281	102	95
	98%	98%	97%	100%	100%	93%	97%	98%	98%	98%	98%	98%	97%	97%	100%
TNT	77	72	3	1	*	*	5	61	16	73	4	38	22	6	11
	5%	5%	8%	10%	6%	5%	8%	5%	3%	5%	7%	3%	7%	6%	11%
		a					a					a			a
Parcellforce	49	47	1	-	1	*	2	40	9	46	3	32	9	4	4
	3%	3%	3%	-%	9%	1%	3%	4%	2%	3%	6%	3%	3%	4%	4%
				abcf											
DHL	44	41	2	1	*	1	4	32	13	41	3	22	9	7	7
	3%	3%	5%	13%	2%	7%	6%	3%	3%	3%	5%	2%	3%	6%	8%
				abf			a							a	ab
UPS	43	39	2	1	*	1	4	31	11	40	3	12	11	9	12
	3%	3%	6%	5%	2%	12%	6%	3%	2%	3%	5%	1%	4%	8%	12%
			a			a	a					a		ab	ab
FedEx	39	35	2	*	*	1	3	29	10	38	1	15	9	9	6
	2%	2%	6%	5%	2%	7%	5%	3%	2%	2%	2%	1%	3%	8%	7%
			a			a	a					a		ab	a
UK Mail	31	30	*	*	*	*	1	26	5	30	*	7	9	6	8
	2%	2%	1%	3%	2%	2%	2%	2%	1%	2%	1%	1%	3%	5%	9%
												a		a	ab
APC	23	22	1	*	-	*	2	20	4	23	*	11	6	4	2
	1%	1%	2%	3%	-%	5%	3%	2%	1%	1%	1%	1%	2%	4%	2%
														a	
Interlink / Interlink Express / Direct	21	20	1	*	*	-	2	14	7	21	*	10	3	5	3
	1%	1%	3%	5%	2%	-%	3%	1%	2%	1%	1%	1%	1%	5%	3%
				a										ab	a
Hermes	20	20	-	-	-	-	-	14	7	19	1	9	7	-	5
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	2%	1%	2%	-%	5%
		f										a			ac
City Link Post	19	19	*	*	-	*	1	11	9	18	2	4	7	4	4
	1%	1%	1%	2%	-%	3%	1%	1%	2%	1%	3%	1%	2%	4%	4%
						b						a		a	a
DX	18	15	1	1	*	*	2	14	4	15	3	4	10	1	3
	1%	1%	4%	8%	2%	1%	4%	1%	1%	1%	4%	1%	3%	1%	3%
			a	a		a	a				a		a		a
Local Courier	9	9	-	-	*	*	*	8	1	9	*	5	4	*	*
	1%	1%	-%	-%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Pitney Bowes	8	8	*	-	-	-	*	5	2	8	*	1	7	-	-
	1%	1%	1%	-%	-%	-%	1%	1%	1%	1%	1%	1%	2%	-%	-%
												a			
Freight - Better / Night	7	7	-	-	-	-	-	2	6	7	-	-	4	2	2
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-%	-%	1%	2%	2%
								a					a		a
Wey Group International	7	7	-	-	-	-	-	7	-	5	2	4	2	-	2

Ofcom: Business Postal Tracker

Table 13 (continuation)

Page 117

QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Tuffnells	4	4	*	*	-	*	1	2	2	4	*	-	*	4	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
DPD	4	3	1	*	-	*	2	4	1	4	*	1	2	1	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Parcels to go	4	4	-	-	-	-	-	2	2	4	-	3	*	*	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Priority Express	2	2	*	-	-	*	*	2	-	2	-	*	2	-	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
One Post	2	2	-	-	-	-	-	-	2	2	-	-	-	-	2
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Legal Post	1	1	*	-	*	-	*	1	*	1	*	1	-	*	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Fastway Couriers	1	1	-	-	-	-	*	-	1	1	-	-	-	*	1
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Haynes	1	*	*	-	-	-	*	-	1	*	*	-	-	*	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Neo Post	1	*	*	-	*	-	*	1	-	1	-	*	*	*	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Post	1	*	*	-	-	-	*	1	-	1	-	*	-	-	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
ENC	*	*	-	-	-	-	-	*	-	*	-	-	*	-	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
AJG Parcels	*	*	-	-	-	-	-	*	*	*	-	*	-	-	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Eagle Couriers	*	-	*	-	*	-	*	*	-	-	*	-	*	*	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yodel	*	-	*	-	-	-	*	*	-	*	-	-	-	*	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Global Mailing	*	-	*	-	-	-	*	*	-	*	-	-	-	-	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Line	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	3	3	-	-	-	-	-	*	2	3	-	3	-	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	*%	*%	-	*%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	94	88	3	1	1	-	5	72	22	89	4	47	22	12	13
	6%	6%	9%	8%	18%	-%	8%	6%	5%	6%	7%	4%	7%	11%	14%
			e	e	aef		e						a	a	ab
NET: RM Only	1178	1138	25	5	5	40	40	816	361	1135	43	920	174	50	34
	73%	74%	64%	52%	68%	59%	62%	72%	78%	73%	72%	83%	60%	47%	36%
		bcef							a			bcd	cd	d	
NET: RM and other	392	369	13	5	2	3	23	299	93	377	15	171	107	52	61
	24%	24%	33%	48%	32%	34%	36%	26%	20%	24%	26%	15%	37%	50%	64%
			a	ab		a	a	b					a	ab	abc
NET: Provider other than RM only	25	24	1	-	-	1	2	22	3	24	1	13	10	2	*
	2%	2%	3%	-%	-%	7%	3%	2%	1%	2%	2%	1%	3%	2%	*%
						a							ad		

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Royal Mail	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
	98%	98%	98%	98%	98%	100%	98%	100%	98%	99%	89%	95%	100%	100%	95%	100%	97%
TNT	77	25	21	5	12	10	3	*	56	5	6	6	5	59	14	32	41
	5%	4%	7%	2%	5%	13%	10%	3%	4%	6%	13%	14%	16%	21%	11%	18%	19%
			ac			abcd	ac				a	a	a	b			
Parcellforce	49	30	8	6	1	3	*	*	45	-	1	2	1	36	9	25	20
	3%	4%	3%	3%	1%	4%	1%	3%	3%	-%	2%	6%	5%	13%	7%	14%	9%
		d				d						b	b				
DHL	44	23	6	9	5	1	1	*	28	8	5	4	*	26	18	17	28
	3%	3%	2%	4%	2%	1%	3%	1%	2%	10%	11%	9%	1%	10%	15%	9%	13%
									a		a	a					
UPS	43	13	12	4	5	6	3	*	27	2	5	8	1	27	16	20	23
	3%	2%	4%	2%	2%	8%	9%	1%	2%	3%	13%	18%	2%	10%	13%	11%	10%
						acd	acd				ab	abe					
FedEx	39	9	10	10	5	2	*	1	25	1	5	5	3	22	16	11	27
	2%	1%	3%	4%	2%	3%	1%	13%	2%	1%	12%	12%	10%	8%	13%	6%	12%
			a	a							ab	ab	ab			a	a
UK Mail	31	5	6	7	5	7	*	*	16	5	1	2	7	14	15	5	24
	2%	1%	2%	3%	2%	10%	2%	1%	1%	6%	3%	4%	23%	5%	13%	3%	11%
				a		abcdf				a		a	abcd		a	a	a
APC	23	5	3	7	2	7	*	-	14	1	5	2	2	17	6	6	17
	1%	1%	1%	3%	1%	8%	1%	-%	1%	1%	11%	5%	5%	6%	5%	4%	8%
				a		abcdf					ab	a	a				
Interlink / Interlink Express / Direct	21	4	5	4	6	2	*	-	13	4	2	1	2	15	5	11	9
	1%	1%	2%	2%	3%	2%	1%	-%	1%	5%	4%	2%	7%	5%	4%	6%	4%
				a						a	a		a				
Hermes	20	10	3	2	2	2	1	-	10	3	-	4	3	15	4	13	6
	1%	1%	1%	1%	1%	3%	5%	-%	1%	4%	-%	8%	12%	5%	3%	7%	3%
						bc	abc			a		ac	ac			b	
City Link Post	19	8	2	1	4	3	1	*	11	-	2	4	2	12	8	10	9
	1%	1%	1%	1%	2%	4%	5%	2%	1%	-%	6%	9%	7%	4%	6%	6%	4%
											ab	ab	ab				
DX	18	*	1	6	5	2	3	*	14	2	*	1	*	10	5	10	5
	1%	1%	1%	3%	2%	3%	9%	2%	1%	3%	1%	1%	2%	4%	4%	6%	2%
				ab	a	ab	abcde				1%						
Local Courier	9	2	*	2	4	-	-	-	8	-	-	*	-	4	5	4	5
	1%	1%	1%	1%	2%	-%	-%	-%	1%	-%	-%	1%	-%	1%	4%	2%	2%
					ab												
Pitney Bowes	8	-	1	-	4	1	2	-	5	1	-	2	-	1	2	1	2
	1%	-%	1%	-%	2%	2%	6%	-%	1%	2%	-%	4%	-%	1%	1%	1%	1%
					a	ac	abcd			a		a					
Freight - Better / Night	7	2	2	2	2	-	-	-	4	-	-	4	-	4	4	4	4
	1%	1%	1%	1%	1%	-%	-%	-%	1%	-%	-%	9%	-%	1%	3%	2%	2%
												abc					

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Significance Level: 95%	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Unweighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Weighted total																	
Wey Group International	7	4	-	4	-	-	-	-	5	-	2	-	-	4	4	-	7
	%	%	-%	2%	-%	-%	-%	-%	%	-%	4%	-%	-%	1%	3%	-%	3%
				b							ab					a	
Tuffnells	4	2	-	*	2	*	-	-	-	*	2	2	*	2	2	2	2
	%	%	-%	%	1%	%	-%	-%	-%	%	4%	4%	1%	1%	2%	1%	1%
										a	a	a	a				
DPD	4	2	1	-	*	*	*	-	3	*	*	*	*	3	1	3	1
	%	%	%	-%	%	1%	1%	-%	%	%	1%	%	%	1%	%	2%	1%
Parcels to go	4	4	-	-	*	-	-	-	4	-	-	-	-	4	*	4	*
	%	%	-%	-%	%	-%	-%	-%	%	-%	-%	-%	-%	1%	%	2%	%
Priority Express	2	-	2	-	*	-	-	-	1	2	-	-	-	1	2	1	2
	%	-%	1%	-%	%	-%	-%	-%	%	2%	-%	-%	-%	%	1%	%	1%
			a							a							
One Post	2	-	-	-	-	-	-	2	-	-	2	-	-	2	-	2	-
	%	-%	-%	-%	-%	-%	-%	18%	-%	-%	4%	-%	-%	1%	-%	1%	-%
											ab						
Legal Post	1	*	-	-	-	*	*	*	1	-	-	*	-	*	1	*	1
	%	%	-%	-%	-%	1%	%	1%	%	-%	-%	%	-%	%	1%	%	%
Fastway Couriers	1	-	-	-	1	-	*	-	-	-	*	-	1	1	-	1	-
	%	-%	-%	-%	%	-%	%	-%	-%	-%	1%	-%	2%	%	-%	1%	-%
											a		a				
Haynes	1	-	-	-	-	1	-	-	*	-	-	-	*	1	-	-	1
	%	-%	-%	-%	-%	1%	-%	-%	%	-%	-%	-%	1%	%	-%	-%	%
						a							a				
Neo Post	1	-	*	-	*	*	-	-	1	-	-	-	-	*	-	*	-
	%	-%	%	-%	%	%	-%	-%	%	-%	-%	-%	-%	%	-%	%	-%
First Post	1	-	-	-	-	*	*	-	*	-	-	*	-	-	1	-	1
	%	-%	-%	-%	-%	1%	%	-%	%	-%	-%	%	-%	-%	%	-%	%
ENC	*	-	-	*	-	-	-	-	-	*	-	-	-	*	-	*	-
	%	-%	-%	%	-%	-%	-%	-%	-%	1%	-%	-%	-%	%	-%	%	-%
										a							
AJG Parcels	*	*	-	-	-	-	-	-	*	-	-	-	-	-	*	*	-
	%	%	-%	-%	-%	-%	-%	-%	%	-%	-%	-%	-%	-%	%	%	-%
Eagle Couriers	*	-	-	*	-	-	*	-	*	*	-	-	-	*	-	*	-
	%	-%	-%	%	-%	-%	%	-%	%	%	-%	-%	-%	%	-%	%	-%
Yodel	*	-	-	-	-	*	-	-	*	-	-	-	-	*	-	*	-
	%	-%	-%	-%	-%	%	-%	-%	%	-%	-%	-%	-%	%	-%	%	-%
Global Mailing	*	-	-	-	-	*	-	-	-	-	-	-	*	*	-	*	-
	%	-%	-%	-%	-%	-%	%	-%	-%	-%	-%	-%	%	%	-%	%	-%
													a				
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Line	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	3	3	-	-	-	-	-	-	3	-	-	-	-	-	-	-	-
	*%	*%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	94	36	25	11	16	3	4	*	64	11	5	7	6	60	28	33	54
	6%	5%	8%	4%	7%	4%	14%	4%	5%	15%	12%	17%	20%	22%	23%	19%	25%
						ace				a	a	a	a				
NET: RM Only	1178	578	222	170	152	34	17	6	1116	36	9	10	7	-	-	-	-
	73%	80%	71%	71%	70%	43%	57%	58%	79%	48%	21%	23%	23%	-%	-%	-%	-%
		bcdef	ef	ef	ef				bcde	cde							
NET: RM and other	392	123	83	65	62	44	12	4	271	38	29	31	23	274	117	179	211
	24%	17%	26%	27%	28%	56%	41%	42%	19%	51%	68%	72%	77%	100%	95%	100%	97%
			a	a	a	abcdf	abcd			a	ab	ab	ab	b		b	
NET: Provider other than RM only	25	11	6	4	4	*	-	-	18	1	5	2	*	-	6	-	6
	2%	2%	2%	2%	2%	*%	-%	-%	1%	1%	11%	5%	*%	-%	5%	-%	3%
										abe				a		a	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Royal Mail	1570	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
	98%	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
		98%	97%	99%	98%	98%	98%	97%	99%	98%	98%	98%	98%	100%	100%
TNT	77	36	14	27	68	45	70	57	18	57	54	71	21	63	55
	5%	4%	5%	5%	5%	5%	5%	8%	5%	5%	8%	5%	9%	5%	5%
							abcef				b		b		
Parcelforce	49	28	12	9	43	35	45	46	11	36	36	47	10	34	32
	3%	4%	4%	2%	3%	4%	3%	6%	3%	3%	5%	3%	4%	3%	3%
			c				abcef				b				
DHL	44	23	8	14	39	26	39	35	14	28	35	39	28	34	30
	3%	3%	3%	3%	3%	3%	3%	5%	4%	2%	5%	3%	12%	3%	3%
							abcf				b		ab		
UPS	43	18	9	16	40	25	40	35	15	32	31	38	24	33	34
	3%	2%	3%	3%	3%	3%	3%	5%	4%	3%	5%	3%	10%	3%	3%
							abcf				b		ab		
FedEx	39	15	6	18	35	25	37	35	18	29	29	37	20	34	28
	2%	2%	2%	4%	2%	3%	2%	5%	5%	2%	4%	2%	9%	3%	3%
							abcf		acf		b		ab		
UK Mail	31	11	8	11	30	18	31	26	9	27	25	30	8	23	23
	2%	1%	3%	2%	2%	2%	2%	4%	2%	2%	4%	2%	3%	2%	2%
							abc				b				
APC	23	10	6	7	23	10	23	22	17	23	19	22	4	17	19
	1%	1%	2%	1%	2%	1%	2%	3%	4%	2%	3%	1%	2%	1%	2%
							abc		abcf		b				
Interlink / Interlink Express / Direct	21	11	3	7	21	12	21	17	5	20	10	21	1	12	18
	1%	1%	1%	1%	1%	1%	1%	2%	1%	2%	1%	1%	1%	1%	2%
Hermes	20	4	2	14	14	9	16	18	3	15	14	18	3	12	15
	1%	1%	1%	3%	1%	1%	1%	2%	1%	1%	2%	1%	1%	1%	1%
			a				abcef								
City Link Post	19	8	4	7	19	15	19	17	13	16	13	19	6	15	18
	1%	1%	1%	1%	1%	2%	1%	2%	3%	1%	2%	1%	3%	1%	2%
							abcf								
DX	18	*	3	14	17	17	18	9	8	17	11	17	2	13	15
	1%	%	1%	3%	1%	2%	1%	1%	2%	1%	2%	1%	1%	1%	1%
			a	a											
Local Courier	9	5	1	4	7	6	7	8	3	8	8	7	3	7	6
	1%	1%	%	1%	%	1%	%	1%	1%	1%	1%	%	1%	1%	1%
											b				
Pitney Bowes	8	2	4	2	8	8	8	7	4	8	6	8	1	3	3
	%	%	1%	%	1%	1%	1%	1%	1%	1%	1%	1%	1%	%	%
			a												
Freight - Better / Night	7	4	2	2	7	6	7	6	2	7	6	7	2	6	7
	%	%	1%	%	1%	1%	%	1%	%	1%	1%	1%	1%	%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Weighted total	1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
Wey Group International	7 *%	4 *%	- -%	4 1%	7 *%	5 1%	7 *%	5 1%	2 *%	5 *%	4 1%	7 *%	2 1%	7 1%	4 *%
Tuffnells	4 *%	4 1%	- -%	* *%	4 *%	2 *%	4 *%	4 1%	2 1%	2 *%	2 *%	4 *%	* *%	2 *%	4 *%
DPD	4 *%	3 *%	* *%	1 *%	4 *%	2 *%	4 *%	2 *%	1 *%	4 *%	2 *%	4 *%	2 1%	2 *%	4 *%
Parcels to go	4 *%	2 *%	- -%	2 *%	4 *%	4 *%	4 *%	1 *%	- -%	3 *%	1 *%	4 *%	1 *%	4 *%	4 *%
Priority Express	2 *%	* *%	- -%	2 *%	2 *%	2 *%	2 *%	2 *%	* *%	2 *%	1 *%	2 *%	1 *%	2 *%	2 *%
One Post	2 *%	- -%	- -%	2 *%	2 *%	2 *%	2 *%	2 *%	- -%	2 *%	- -%	2 *%	- -%	- -%	2 *%
Legal Post	1 *%	* *%	1 *%	* *%	1 *%	1 *%	1 *%	* *%	1 *%	1 *%	* *%	1 *%	* *%	1 *%	* *%
Fastway Couriers	1 *%	* *%	- -%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%
Haynes	1 *%	- -%	- -%	1 *%	1 *%	1 *%	1 *%	* *%	- -%	* *%	* *%	1 *%	- -%	1 *%	1 *%
Neo Post	1 *%	* *%	* *%	* *%	1 *%	1 *%	1 *%	1 *%	* *%	1 *%	1 *%	1 *%	* *%	* *%	- -%
First Post	1 *%	- -%	* *%	* *%	1 *%	1 *%	1 *%	* *%	* *%	1 *%	* *%	1 *%	- -%	1 *%	* *%
ENC	* *%	- -%	- -%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	- -%	* *%	* *%
AJG Parcels	* *%	- -%	- -%	* *%	- -%	* *%	* *%	- -%	- -%	* *%	* *%	* *%	- -%	* *%	- -%
Eagle Couriers	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	- -%	* *%	* *%
Yodel	* *%	- -%	- -%	* *%	* *%	* *%	* *%	* *%	- -%	* *%	* *%	* *%	- -%	- -%	* *%
Global Mailing	* *%	- -%	- -%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%	* *%
MHI (Mail Handling International)	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Lynx	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Fast Track	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Euro		811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail		-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post		-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Line		-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	3	3	-	-	-	-	-	-	-	-	-	-	-	-	-
	*%	*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know		-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	94	40	16	35	88	54	88	78	39	72	65	89	28	65	70
	6%	5%	6%	7%	6%	6%	6%	11%	10%	6%	10%	6%	12%	5%	6%
							abcf		abcf				b		
NET: RM Only	1178	636	196	337	1086	631	1103	390	239	930	381	1083	115	884	762
	73%	78%	69%	68%	74%	70%	73%	53%	63%	73%	57%	73%	49%	74%	71%
		bc			bde	de	de	d	de		c	ac			
NET: RM and other	392	156	78	155	369	259	375	315	136	315	272	372	115	310	313
	24%	19%	28%	31%	25%	29%	25%	43%	36%	25%	41%	25%	49%	26%	29%
			a	a		acf		abcf	abcf		b		ab		
NET: Provider other than RM only	25	12	6	5	17	14	19	22	5	19	13	21	3	-	-
	2%	2%	2%	1%	1%	2%	1%	3%	1%	1%	2%	1%	1%	-%	-%
							abcf								

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Royal Mail	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
	98%	100%	100%	100%	98%	98%	98%	98%	98%	100%	98%	98%	98%	99%	98%	98%
TNT	77	16	1	57	77	69	77	68	77	-	57	77	30	11	9	56
	5%	6%	4%	4%	5%	5%	5%	6%	5%	-%	6%	5%	8%	8%	4%	5%
Parcellforce	49	6	-	35	45	47	47	48	49	-	40	49	14	9	7	32
	3%	2%	-%	3%	3%	4%	3%	4%	3%	-%	4%	3%	4%	7%	3%	3%
DHL	44	8	1	32	42	37	42	33	44	-	29	42	27	6	7	31
	3%	3%	4%	2%	3%	3%	3%	3%	3%	-%	3%	3%	7%	4%	3%	3%
UPS	43	8	3	30	41	35	41	36	43	-	30	43	25	11	4	26
	3%	3%	9%	2%	3%	3%	3%	3%	3%	-%	3%	3%	7%	8%	2%	2%
FedEx	39	5	*	32	39	33	39	32	39	-	28	39	16	4	8	26
	2%	2%	*%	2%	2%	2%	2%	3%	2%	-%	3%	2%	5%	3%	3%	2%
UK Mail	31	7	2	21	31	29	31	26	31	-	18	31	9	18	*	13
	2%	3%	5%	2%	2%	2%	2%	2%	2%	-%	2%	2%	2%	12%	*%	1%
APC	23	3	2	17	23	22	23	23	23	-	13	23	5	2	4	18
	1%	1%	6%	1%	1%	2%	1%	2%	1%	-%	1%	1%	1%	1%	1%	1%
Interlink / Interlink Express / Direct	21	3	-	17	21	18	21	14	21	-	10	21	7	4	2	16
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	3%	1%	1%
Hermes	20	5	1	15	20	20	20	17	20	-	17	20	6	8	-	12
	1%	2%	4%	1%	1%	1%	1%	1%	1%	-%	2%	1%	2%	6%	-%	1%
City Link Post	19	2	1	18	19	17	19	18	19	-	9	19	6	2	1	16
	1%	1%	4%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	1%	*%	1%
DX	18	4	2	9	18	18	18	13	18	-	9	18	2	2	2	13
	1%	1%	6%	1%	1%	1%	1%	1%	1%	-%	1%	1%	*%	1%	1%	1%
Local Courier	9	1	-	7	9	8	9	7	9	-	6	9	2	2	2	4
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	*%	1%	1%	*%
Pitney Bowes	8	-	-	3	8	8	8	5	8	-	4	8	3	*	-	7
	*%	-%	-%	*%	*%	1%	*%	*%	*%	-%	*%	*%	1%	*%	-%	1%
Freight - Better / Night	7	-	-	7	7	6	7	7	7	-	6	7	2	-	2	6
	*%	-%	-%	1%	*%	*%	*%	1%	*%	-%	1%	*%	1%	-%	1%	*%
Wey Group International	7	2	-	5	7	5	7	7	7	-	5	7	4	2	-	5
	*%	1%	-%	*%	*%	*%	*%	1%	*%	-%	1%	*%	1%	1%	-%	*%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Ofcom: Business Postal Tracker

Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Tuffnells

DPD

Parcels to go

Priority Express

One Post

Legal Post

Fastway Couriers

Haynes

Neo Post

First Post

ENC

AJG Parcels

Eagle Couriers

Yodel

Global Mailing

MHI (Mail Handling International)

Lynx

Fast Track

Euro

Produced by OLR

OFC1885

Issue date: 03/07/13

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
	-	-	4	4	4	4	4	4	-	2	4	2	*	-	4
%	-%	-%	%	%	%	%	%	%	-%	%	%	1%	%	-%	%
	1	-	3	4	2	4	4	4	-	2	4	2	1	-	4
%	%	-%	%	%	%	%	%	%	-%	%	%	1%	%	-%	%
	1	-	3	4	4	4	2	4	-	2	4	1	*	-	4
%	%	-%	%	%	%	%	%	%	-%	%	%	%	%	-%	%
	*	-	2	2	2	2	2	2	-	*	2	1	*	-	2
%	%	-%	%	%	%	%	%	%	-%	%	%	%	%	-%	%
	-	-	2	2	2	2	2	2	-	-	-	-	2	-	-
%	-%	-%	%	%	%	%	%	%	-%	-%	-%	-%	1%	-%	-%
	1	-	*	1	1	1	1	1	-	1	1	1	-	*	1
%	%	-%	%	%	%	%	%	%	-%	%	%	%	-%	%	%
	-	-	1	1	1	1	1	1	-	1	1	1	1	-	*
%	-%	-%	%	%	%	%	%	%	-%	%	%	%	%	-%	%
	*	-	*	1	1	1	*	1	-	1	1	1	*	*	-
%	%	-%	%	%	%	%	%	%	-%	%	%	%	%	%	-%
	-	-	*	*	-	*	*	*	-	*	*	-	-	-	*
%	-%	-%	%	%	-%	%	%	%	-%	%	%	-%	-%	-%	%
	-	-	*	*	*	*	*	*	-	*	*	-	-	-	*
%	-%	-%	%	%	%	%	%	%	-%	%	%	%	-%	-%	%
	-	*	*	*	*	*	*	*	-	*	*	-	*	*	-
%	-%	%	%	%	%	%	%	%	-%	%	%	-%	%	%	-%
	-	-	*	*	*	*	*	*	-	-	*	-	-	-	*
%	-%	-%	%	%	%	%	%	%	-%	-%	%	-%	-%	-%	%
	-	-	*	*	*	*	*	*	-	*	*	*	-	-	*
%	-%	-%	%	%	%	%	%	%	-%	%	%	%	-%	-%	%
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Ofcom: Business Postal Tracker

Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Line	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	3	-	-	3	2	3	2	3	-	2	3	2	-	-	3
	1%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	94	22	2	92	81	92	82	94	-	63	92	37	16	10	66
	6%	9%	5%	6%	6%	6%	7%	6%	-%	7%	6%	10%	11%	4%	5%
	c											ab	bc		
NET: RM Only	1178	187	25	1143	970	1148	840	1166	2	616	1147	210	76	191	909
	73%	72%	69%	73%	72%	73%	70%	73%	100%	69%	73%	59%	52%	80%	75%
										c	ac		a	a	a
NET: RM and other	392	74	11	383	345	385	334	392	-	258	386	141	69	44	279
	24%	28%	31%	25%	26%	25%	28%	25%	-%	29%	25%	39%	47%	18%	23%
										b		ab	bc		
NET: Provider other than RM only	25	-	-	25	24	25	22	25	-	15	25	5	1	5	18
	2%	-%	-%	2%	2%	2%	2%	2%	-%	2%	2%	1%	1%	2%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Ofcom: Business Postal Tracker

Table 13 (continuation)

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QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Royal Mail	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
	98%	91%	100%	99%	97%	99%	98%	95%	100%	100%	100%	100%	93%	82%
TNT	77	24	9	44	57	20	75	2	49	2	24	48	59	*
	5%	12%	8%	3%	5%	4%	5%	2%	5%	2%	6%	4%	16%	1%
Parcellforce	49	20	4	25	37	12	49	-	28	6	12	30	43	2
	3%	10%	4%	2%	3%	2%	3%	-%	3%	5%	3%	3%	11%	28%
DHL	44	21	2	22	34	10	44	*	30	2	12	29	40	1
	3%	10%	1%	2%	3%	2%	3%	%	3%	2%	3%	2%	11%	16%
UPS	43	17	3	23	32	11	43	-	29	1	18	23	39	2
	3%	8%	3%	2%	3%	2%	3%	-%	3%	1%	5%	2%	10%	22%
FedEx	39	14	6	19	28	11	39	-	24	7	15	22	35	1
	2%	7%	6%	1%	3%	2%	3%	-%	2%	5%	4%	2%	9%	16%
UK Mail	31	14	5	12	25	6	31	-	20	-	12	17	29	-
	2%	7%	5%	1%	2%	1%	2%	-%	2%	-%	3%	1%	8%	-%
APC	23	10	2	12	17	6	23	-	13	2	10	13	23	-
	1%	5%	2%	1%	2%	1%	2%	-%	1%	2%	2%	1%	6%	-%
Interlink / Interlink Express / Direct	21	9	*	12	15	6	21	-	13	2	4	16	19	-
	1%	4%	%	1%	1%	1%	1%	-%	1%	1%	1%	1%	5%	-%
Hermes	20	9	7	4	10	10	20	-	14	2	11	10	16	-
	1%	4%	7%	%	1%	2%	1%	-%	1%	1%	3%	1%	4%	-%
City Link Post	19	7	1	11	16	3	19	-	13	-	7	13	14	2
	1%	3%	1%	1%	1%	1%	1%	-%	1%	-%	2%	1%	4%	30%
DX	18	2	*	14	12	5	16	1	7	1	6	9	16	1
	1%	1%	%	1%	1%	1%	1%	1%	1%	1%	2%	1%	4%	16%
Local Courier	9	4	-	5	7	2	9	-	2	2	3	6	8	-
	1%	2%	-%	%	1%	%	1%	-%	%	2%	1%	1%	2%	-%
Pitney Bowes	8	*	-	7	6	2	8	-	3	-	-	3	7	-
	%	%	-%	1%	1%	%	1%	-%	%	-%	-%	%	2%	-%
Freight - Better / Night	7	4	4	-	6	2	7	-	2	-	2	6	6	-
	%	2%	3%	-%	1%	%	1%	-%	%	-%	%	%	2%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 13 (continuation)

Page 129

QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Wey Group International	7	2	-	5	7	-	7	-	5	-	4	4	7	-
	%	1%	-%	%	1%	-%	%	-%	1%	-%	1%	%	2%	-%
Tuffnells	4	4	-	*	4	*	4	-	*	-	2	2	4	-
	%	2%	-%	%	%	%	%	-%	%	-%	%	%	1%	-%
DPD	4	1	*	3	3	1	4	-	3	*	*	4	4	-
	%	1%	%	%	%	%	%	-%	%	%	%	%	1%	-%
Parcels to go	4	1	-	3	4	*	4	-	3	-	1	3	4	-
	%	%	-%	%	%	%	%	-%	%	-%	%	%	1%	-%
Priority Express	2	*	-	2	*	2	2	-	*	2	1	2	2	-
	%	%	-%	%	%	%	%	-%	%	1%	%	%	1%	-%
One Post	2	2	-	-	-	2	2	-	2	-	-	2	2	-
	%	1%	-%	-%	-%	%	%	-%	%	-%	-%	%	%	-%
Legal Post	1	1	*	-	*	1	1	-	*	*	*	1	1	-
	%	1%	%	-%	%	%	%	-%	%	%	%	%	%	-%
Fastway Couriers	1	1	-	*	1	-	1	-	-	-	1	*	1	-
	%	%	-%	%	%	-%	%	-%	-%	-%	%	%	%	-%
Haynes	1	-	*	*	1	-	1	-	*	*	1	-	*	-
	%	-%	%	%	%	-%	%	-%	%	%	%	-%	%	-%
Neo Post	1	*	-	1	1	-	1	-	*	-	-	*	1	-
	%	%	-%	%	%	-%	%	-%	%	-%	-%	%	%	-%
First Post	1	1	-	-	*	*	1	-	-	1	*	*	1	-
	%	%	-%	-%	%	%	%	-%	-%	%	%	%	%	-%
ENC	*	-	*	-	*	-	*	-	-	-	-	*	-	*
	%	-%	%	-%	%	-%	%	-%	-%	-%	-%	%	-%	6%
AJG Parcels	*	*	-	-	*	-	*	-	-	-	*	-	*	-
	%	%	-%	-%	%	-%	%	-%	-%	-%	%	-%	%	-%
Eagle Couriers	*	-	-	*	*	-	*	-	*	-	-	*	*	-
	%	-%	-%	%	%	-%	%	-%	%	-%	-%	%	%	-%
Yodel	*	-	*	-	*	-	*	-	*	-	*	-	-	*
	%	-%	%	-%	%	-%	%	-%	%	-%	%	-%	-%	2%
Global Mailing	*	-	-	*	*	-	*	-	*	-	-	*	-	-
	%	-%	-%	%	%	-%	%	-%	%	-%	-%	%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 13 (continuation)

Page 130

QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Line	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None	3	-	-	3	2	1	2	1	-	-	-	-	2	-
	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	1%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	94	33	11	47	68	25	89	4	55	6	35	49	86	2
	6%	16%	11%	4%	6%	5%	6%	4%	5%	5%	9%	4%	23%	22%
NET: RM Only	1178	67	60	1041	784	393	1079	99	785	92	258	920	-	-
	73%	33%	58%	81%	72%	77%	72%	92%	76%	75%	65%	78%	-%	-%
		a	a	ab	a	a	a	a			a	a		
NET: RM and other	392	120	44	228	283	109	388	4	253	31	137	255	348	7
	24%	58%	42%	18%	26%	21%	26%	3%	24%	25%	35%	22%	93%	82%
		bc	c				b				b			
NET: Provider other than RM only	25	18	*	7	22	4	25	*	-	-	-	-	20	1
	2%	9%	-%	1%	2%	1%	2%	-%	-%	-%	-%	-%	5%	18%
		bc												

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 13 (continuation)

Page 131

QV4. And who does your organisation use for its mail service?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Royal Mail

TNT

Parcelforce

DHL

UPS

FedEx

UK Mail

APC

 Interlink / Interlink
Express / Direct

Hermes

City Link Post

DX

Local Courier

Pitney Bowes

Freight - Better / Night

Wey Group International

Tuffnells

DPD

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1570	387	400	396	387
98%	99%	99%	97%	97%
	c	cd		
77	22	29	13	13
5%	6%	7%	3%	3%
		cd		
49	16	8	12	13
3%	4%	2%	3%	3%
44	9	15	10	11
3%	2%	4%	2%	3%
43	14	8	14	6
3%	4%	2%	3%	2%
39	6	17	10	5
2%	2%	4%	3%	1%
		ad		
31	4	9	5	13
2%	1%	2%	1%	3%
				ac
23	5	10	5	2
1%	1%	3%	1%	1%
		d		
21	8	3	6	4
1%	2%	1%	2%	1%
20	5	3	4	8
1%	1%	1%	1%	2%
19	9	5	1	5
1%	2%	1%	1%	1%
	c			
18	14	1	2	*
1%	4%	1%	1%	1%
	bcd			
9	2	5	2	-
1%	1%	1%	1%	-1%
		d		
8	1	3	4	-
1%	1%	1%	1%	-1%
7	2	-	4	2
1%	1%	-1%	1%	1%
			b	
7	2	2	2	2
1%	1%	1%	1%	1%
4	2	2	*	-
1%	1%	1%	1%	-1%
4	*	1	1	3
1%	1%	1%	1%	1%

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OFC1885

Issue date: 03/07/13

Ofcom: Business Postal Tracker

Table 13 (continuation)

Page 132

QV4. And who does your organisation use for its mail service?

Base: All respondents

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1604	405	410	403	386
Weighted total	1604	392	403	410	399
Parcels to go	4 *%	2 1%	- -%	- -%	2 *%
Priority Express	2 *%	2 *%	- -%	- -%	* *%
One Post	2 *%	2 *%	- -%	- -%	- -%
Legal Post	1 *%	* *%	1 *%	- -%	- -%
Fastway Couriers	1 *%	- -%	- -%	1 *%	* *%
Haynes	1 *%	1 *%	- -%	- -%	- -%
Neo Post	1 *%	* *%	- -%	* *%	- -%
First Post	1 *%	* *%	* *%	- -%	- -%
ENC	* *%	* *%	- -%	- -%	- -%
AJG Parcels	* *%	- -%	- -%	- -%	* *%
Eagle Couriers	* *%	* *%	- -%	- -%	- -%
Yodel	* *%	- -%	* *%	- -%	- -%
Global Mailing	* *%	* *%	- -%	- -%	- -%
MHI (Mail Handling International)	- -%	- -%	- -%	- -%	- -%
Lynx	- -%	- -%	- -%	- -%	- -%
Fast Track	- -%	- -%	- -%	- -%	- -%
Euro	- -%	- -%	- -%	- -%	- -%
UK / British Mail	- -%	- -%	- -%	- -%	- -%
Business Post	- -%	- -%	- -%	- -%	- -%
Parcel Line	- -%	- -%	- -%	- -%	- -%
None	3 *%	- -%	- -%	2 1%	* *%

Columns Tested: a,b,c,d

QV4. And who does your organisation use for its mail service?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Don't know

Other answers

NET: RM Only

NET: RM and other

NET: Provider other than
RM only

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
-	-	-	-	-
-%	-%	-%	-%	-%
94	20	34	26	14
6%	5%	8%	6%	3%
		d		
1178	277	284	311	305
73%	71%	70%	76%	77%
392	110	115	85	81
24%	28%	29%	21%	20%
	cd	cd		
25	4	3	12	7
2%	1%	1%	3%	2%
		b		

Table 14

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Royal Mail

UK Mail

FedEx

UPS

TNT

Parcellforce

City Link Post

DHL

APC

Interlink / Interlink

Express / Direct

DX

Hermes

Freight - Better / Night

Wey Group International

Local Courier

Tuffnells

Pitney Bowes

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
410	*a	b	*c	d	e	f	g	*h	*i	j	k	*l	m
Unweighted total	19	33	22	30	37	62	36	29	25	48	40	29	293
Weighted total	398	26	50	30	31	78	43	49	24	17	15	9	357
Royal Mail	274	20	38	15	17	19	58	30	31	16	11	7	244
69%	79%	76%	50%	64%	62%	74%	70%	64%	66%	67%	74%	78%	68%
UK Mail	14	-	4	2	1	-	4	-	2	-	*	-	13
4%	-%	8%	6%	6%	-%	5%	-%	4%	-%	1%	3%	-%	4%
FedEx	11	2	-	2	1	-	-	4	-	-	*	-	10
3%	7%	-	6%	5%	4%	-%	-%	9%	-%	-%	3%	-%	3%
UPS	11	-	2	2	-	1	2	*	1	-	-	-	11
3%	-%	4%	6%	-%	4%	3%	4%	1%	6%	-%	-%	-%	3%
TNT	9	2	1	-	-	-	4	*	1	2	*	-	7
2%	7%	1%	-%	-%	-%	5%	*%	-%	6%	9%	1%	-%	2%
Parcellforce	7	-	-	4	-	*	-	-	2	-	*	1	6
2%	-%	-%	12%	-%	1%	-%	-%	4%	-%	3%	7%	-%	2%
City Link Post	7	-	-	2	-	-	-	4	-	1	*	-	6
2%	-%	-%	6%	-%	-%	-%	-%	9%	-%	6%	1%	-%	2%
DHL	6	-	-	2	-	3	-	2	-	-	*	-	6
2%	-%	-%	7%	-%	8%	-%	4%	-%	-%	-%	1%	-%	2%
APC	6	-	1	-	-	3	2	-	-	-	*	-	5
2%	-%	1%	-%	-%	8%	2%	-%	-%	-%	3%	3%	-%	1%
Interlink / Interlink	5	-	-	*	1	-	2	-	1	*	*	-	5
Express / Direct	1%	-%	-%	*%	5%	-%	4%	-%	6%	1%	3%	-%	1%
DX	5	-	-	*	2	-	2	-	*	*	-	1	4
1%	-%	-%	*%	6%	-%	-%	4%	-%	1%	3%	-%	11%	1%
Hermes	4	-	-	-	-	-	2	-	2	-	-	-	4
1%	-%	-%	-%	-%	-%	2%	-%	4%	-%	-%	-%	-%	1%
Freight - Better / Night	4	-	-	-	-	-	2	2	-	-	-	-	4
1%	-%	-%	-%	-%	-%	-%	4%	4%	-%	-%	-%	-%	1%
Wey Group International	4	-	-	-	-	-	4	-	-	-	-	-	4
1%	-%	-%	-%	-%	-%	5%	-%	-%	-%	-%	-%	-%	1%
Local Courier	3	-	-	-	3	-	-	-	-	-	-	*	3
1%	-%	-%	-%	10%	-%	-%	-%	-%	-%	-%	-%	6%	1%
Tuffnells	2	-	-	-	-	*	2	-	-	-	*	-	2
1%	-%	-%	-%	-%	1%	2%	-%	-%	-%	-%	1%	-%	1%
Pitney Bowes	2	-	-	-	-	-	2	-	-	-	-	-	2
*%	-%	-%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	1%

Table 14 (continuation)

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Priority Express

First Post

Parcels to go

Legal Post

AJG Parcels

DPD

Yodel

MHI (Mail Handling

International)

Eagle Couriers

Lynx

One Post

ENC

Fast Track

Neo Post

Fastway Couriers

Euro

UK / British Mail

Global Mailing

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
410	*a	b	*c	d	e	f	g	*h	*i	j	k	*l	m
19	19	33	22	30	37	62	36	29	25	48	40	29	293
398	26	50	30	27	31	78	43	49	24	17	15	9	357
2	-	-	-	-	-	-	2	-	-	-	-	-	2
*%	-%	-%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	1%
m													
1	-	-	-	-	-	-	-	-	-	1	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	4%	-%	-%	-%
m													
*	-	-	-	-	-	-	-	-	-	-	*	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%
m													
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%
m													
*	-	-	-	-	-	*	-	*	-	-	-	-	*
*%	-%	-%	-%	-%	-%	*%	-%	1%	-%	-%	-%	-%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Haynes

-%

Business Post

-

-%

Parcel Live

-

-%

Other answers

21

5%

NET: RM

NET: Provider other than

RM

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
410	a	b	c	d	e	f	g	h	i	j	k	l	m
19	33	22	30	37	62	36	29	25	48	40	29	293	
398	26	50	30	27	31	78	43	49	24	17	15	9	357
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
21	2	4	2	-	4	4	-	-	4	*	*	1	19
5%	7%	8%	6%	-%	12%	5%	-%	-%	17%	3%	1%	11%	5%
					dgk								
274	20	38	15	17	19	58	30	31	16	11	11	7	244
69%	79%	76%	50%	64%	62%	74%	70%	64%	66%	67%	74%	78%	68%
124	6	12	15	10	12	21	13	18	8	5	4	2	113
31%	21%	24%	50%	36%	38%	26%	30%	36%	34%	33%	26%	22%	32%

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Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	410	271	81	27	14	17	139	295	115	376	34	156	107	57	90
Weighted total	398	374	13	5	2	3	23	303	95	382	16	174	110	53	61
Royal Mail	274	256	10	3	2	2	17	206	67	261	12	139	65	36	34
	69%	68%	72%	74%	81%	84%	75%	68%	71%	68%	76%	80%	60%	68%	55%
UK Mail	14	14	*	-	*	-	*	12	2	14	*	1	4	2	6
	4%	4%	2%	-%	5%	-%	2%	4%	3%	4%	1%	1%	4%	4%	10%
FedEx	11	11	-	-	-	-	-	9	2	11	-	2	1	5	2
	3%	3%	-%	-%	-%	-%	-%	3%	2%	3%	-%	1%	1%	10%	3%
UPS	11	f												ab	
	3%	10	*	-	-	*	1	9	2	10	*	2	3	-	5
		3%	3%	2%	-%	-%	11%	3%	2%	3%	2%	1%	3%	-%	9%
TNT	9	8	1	-	*	*	1	7	2	9	*	2	3	-	4
	2%	2%	4%	-%	15%	5%	4%	2%	3%	2%	1%	1%	3%	-%	6%
Parcellforce	7	7	*	-	-	-	*	6	1	7	-	4	3	*	-
	2%	2%	1%	-%	-%	-%	1%	2%	1%	2%	-%	3%	3%	*%	-%
City Link Post	7	7	*	-	-	-	*	2	5	7	-	-	5	2	-
	2%	2%	1%	-%	-%	-%	*%	1%	5%	2%	-%	-%	4%	4%	-%
DHL	6	6	*	*	-	-	*	5	1	6	-	2	3	-	2
	2%	2%	1%	2%	-%	-%	1%	2%	1%	2%	-%	1%	2%	-%	3%
APC	6	5	*	*	-	-	1	4	2	6	*	2	3	-	*
	2%	1%	3%	7%	-%	-%	3%	1%	2%	2%	2%	1%	3%	-%	1%
Interlink / Interlink Express / Direct	5	5	*	*	-	-	1	5	1	5	*	-	2	2	2
	1%	1%	3%	3%	-%	-%	2%	2%	1%	1%	1%	-%	2%	4%	2%
DX	5	5	*	*	-	-	1	5	*	5	*	2	2	1	*
	1%	1%	2%	8%	-%	-%	3%	2%	1%	1%	3%	1%	2%	1%	1%
Hermes	4	4	-	-	-	-	-	2	2	4	-	2	2	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	2%	1%	-%	1%	2%	-%	-%
Freight - Better / Night	4	4	-	-	-	-	-	2	2	4	-	-	2	-	2
	1%	1%	-%	-%	-%	-%	-%	1%	2%	1%	-%	-%	2%	-%	3%
Wey Group International	4	4	-	-	-	-	-	4	-	4	-	2	2	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	1%	2%	-%	-%
Local Courier	3	3	-	-	-	-	-	3	*	3	-	1	1	-	*
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-%	1%	1%	-%	1%
Tuffnells	2	2	*	*	-	-	*	2	*	2	-	-	*	2	*
	1%	*%	1%	2%	-%	-%	1%	1%	*%	1%	-%	-%	*%	3%	*%
Pitney Bowes	2	2	-	-	-	-	-	2	-	2	-	-	2	-	-
	*%	*%	-%	-%	-%	-%	-%	1%	-%	*%	-%	-%	2%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	410	271	81	27	14	17	139	295	115	376	34	156	107	57	90
Weighted total	398	374	13	5	2	3	23	303	95	382	16	174	110	53	61
Priority Express	2	2	-	-	-	-	-	2	-	2	-	-	2	-	-
	*%	*%	-%	-%	-%	-%	-	1%	-%	*%	-%	-%	2%	-%	-%
First Post	1	*	*	-	-	-	*	1	-	1	-	*	-	-	*
	*%	*%	1%	-%	-%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%
Parcels to go	*	*	-	-	-	-	-	-	*	*	-	-	-	*	-
	*%	*%	-%	-%	-%	-%	-%	-%	1%	*%	-%	-%	-%	1%	-%
Legal Post	*	*	-	-	-	-	-	*	-	*	-	*	-	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	*%	-%	-%	-%
AJG Parcels	*	*	-	-	-	-	-	-	*	*	-	*	-	-	-
	*%	*%	-%	-%	-%	-%	-%	-%	1%	*%	-%	*%	-%	-%	-%
DPD	*	-	*	*	-	-	*	*	*	*	-	*	-	-	*
	*%	-%	2%	3%	-%	-%	2%	*%	*%	*%	-%	*%	-%	-%	*%
Yodel	-	-	a	-	-	-	a	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Haynes	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	410	271	81	27	14	17	139	295	115	376	34	156	107	57	90
Weighted total	398	374	13	5	2	3	23	303	95	382	16	174	110	53	61
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	21	21	*	*	-	-	*	17	4	19	2	11	4	2	4
	5%	6%	2%	2%	-%	-%	2%	6%	5%	5%	13% a	6%	4%	4%	6%
NET: RM	274	256	10	3	2	2	17	206	67	261	12	139	65	36	34
	69%	68%	72%	74%	81%	84%	75%	68%	71%	68%	76%	80% bd	60%	68%	55%
NET: Provider other than RM	124	118	4	1	*	*	6	96	28	120	4	35	44	17	28
	31%	32%	28%	26%	19%	16%	25%	32%	29%	32%	24%	20%	40% a	32%	45% a

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?
Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	410	103	83	65	70	51	30	8	268	46	30	33	33	291	116	197	211
Weighted total	398	127	84	65	62	44	12	4	275	38	31	31	23	274	123	179	217
Royal Mail	274	77	56	53	45	30	9	4	204	21	17	20	12	274	-	171	102
	69%	61%	67%	82%	72%	69%	76%	89%	74%	55%	54%	63%	52%	100%	-%	96%	47%
				ab					bce					b		b	
UK Mail	14	4	2	1	4	4	-	*	5	2	-	2	5	-	14	-	14
	4%	3%	2%	1%	6%	9%	-%	3%	2%	6%	-%	6%	20%	-%	11%	-%	6%
						c							ac		a		a
FedEx	11	4	4	-	3	-	-	-	5	-	2	2	2	-	11	*	10
	3%	3%	5%	-%	6%	-%	-%	-%	2%	-%	6%	7%	9%	-%	9%	*%	5%
													ab		a		a
UPS	11	5	3	2	-	2	-	-	5	1	2	2	*	-	11	1	9
	3%	4%	3%	3%	-%	4%	-%	-%	2%	4%	6%	6%	1%	-%	9%	1%	4%
															a		a
TNT	9	1	7	-	*	1	1	*	6	-	*	2	*	-	9	-	9
	2%	1%	8%	-%	*%	1%	5%	8%	2%	-%	2%	7%	*%	-%	7%	-%	4%
			acd												a		a
Parcellforce	7	7	*	*	-	-	-	-	7	-	-	-	-	-	7	-	7
	2%	5%	*%	1%	-%	-%	-%	-%	3%	-%	-%	-%	-%	-%	6%	-%	3%
		b													a		a
City Link Post	7	4	*	-	*	2	-	-	5	-	2	-	-	-	7	2	5
	2%	3%	1%	-%	*%	5%	-%	-%	2%	-%	7%	-%	-%	-%	6%	1%	2%
															a		
DHL	6	5	1	*	-	-	-	-	3	2	1	-	-	-	6	-	6
	2%	4%	2%	*%	-%	-%	-%	-%	1%	5%	4%	-%	-%	-%	5%	-%	3%
															a		a
APC	6	2	1	*	-	3	-	-	2	1	1	*	1	-	6	-	6
	2%	2%	1%	1%	-%	6%	-%	-%	1%	2%	4%	1%	6%	-%	5%	-%	3%
						d							a		a		a
Interlink / Interlink Express / Direct	5	2	*	2	1	-	*	-	1	1	2	*	2	-	5	-	5
	1%	1%	*%	3%	2%	-%	2%	-%	*%	3%	6%	*%	7%	-%	4%	-%	2%
										a	a		a		a		a
DX	5	*	1	-	3	1	*	-	5	*	-	*	-	-	5	2	3
	1%	*%	2%	-%	4%	2%	2%	-%	2%	1%	-%	1%	-%	-%	4%	1%	1%
															a		
Hermes	4	4	-	-	-	-	-	-	4	-	-	-	-	-	4	-	4
	1%	3%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	3%	-%	2%
															a		
Freight - Better / Night	4	2	-	2	-	-	-	-	2	-	-	2	-	-	4	-	4
	1%	1%	-%	3%	-%	-%	-%	-%	1%	-%	-%	7%	-%	-%	3%	-%	2%
												a			a		
Wey Group International	4	2	-	2	-	-	-	-	4	-	-	-	-	-	4	-	4
	1%	1%	-%	3%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	3%	-%	2%
															a		
Local Courier	3	-	-	1	2	-	-	-	3	-	-	*	-	-	3	-	3
	1%	-%	-%	2%	3%	-%	-%	-%	1%	-%	-%	2%	-%	-%	3%	-%	1%
															a		

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 14 (continuation)

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	410	103	83	65	70	51	30	8	268	46	30	33	33	291	116	197	211
Weighted total	398	127	84	65	62	44	12	4	275	38	31	31	23	274	123	179	217
Tuffnells	2 1%	2 1%	- -%	- -%	* *%	* *%	- -%	- -%	- -%	- -%	2 6%	* *%	* 1%	- -%	2 2%	- -%	2 1%
Pitney Bowes	2 *%	- -%	- -%	- -%	- -%	- -%	2 15%	- -%	2 1%	- -%	- -%	- -%	- -%	- -%	2 1%	- -%	2 1%
Priority Express	2 *%	- -%	2 2%	- -%	- -%	- -%	- -%	- -%	- -%	2 5%	- -%	- -%	- -%	- -%	2 1%	- -%	2 1%
First Post	1 *%	- -%	- -%	- -%	- -%	* 1%	* 1%	- -%	* *%	- -%	- -%	* *%	- -%	- -%	1 *%	- -%	1 *%
Parcels to go	* *%	* *%	- -%	- -%	- -%	- -%	- -%	- -%	* *%	- -%	- -%	- -%	- -%	- -%	* *%	- -%	* *%
Legal Post	* *%	- -%	- -%	- -%	- -%	* 1%	- -%	- -%	* *%	- -%	- -%	- -%	- -%	- -%	* *%	- -%	* *%
AJG Parcels	* *%	* *%	- -%	- -%	- -%	- -%	- -%	- -%	* *%	- -%	- -%	- -%	- -%	- -%	* *%	* *%	- -%
DPD	* *%	- -%	* *%	- -%	* *%	- -%	- -%	- -%	* *%	- -%	- -%	- -%	1 1%	- -%	* *%	- -%	* *%
Yodel	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
MHI (Mail Handling International)	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Eagle Couriers	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Lynx	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
One Post	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
ENC	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Fast Track	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Neo Post	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Fastway Couriers	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Euro	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
UK / British Mail	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	410	103	83	65	70	51	30	8	268	46	30	33	33	291	116	197	211
Weighted total	398	127	84	65	62	44	12	4	275	38	31	31	23	274	123	179	217
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Haynes	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	21	9	5	1	4	1	-	-	12	6	1	1	*	-	21	2	19
	5%	7%	6%	2%	7%	3%	-%	-%	5%	16%	5%	2%	2%	-%	17%	1%	9%
										ade					a		a
NET: RM	274	77	56	53	45	30	9	4	204	21	17	20	12	274	-	171	102
	69%	61%	67%	82%	72%	69%	76%	89%	74%	82%	54%	63%	52%	100%	-%	96%	47%
				ab					bce					b		b	
NET: Provider other than RM	124	50	28	12	17	14	3	*	70	17	14	12	11	-	123	8	115
	31%	39%	33%	18%	28%	31%	24%	11%	26%	45%	46%	37%	48%	-%	100%	4%	53%
		c	c							a	a		a		a		a

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 14 (continuation)

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	410	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	398	160	89	159	390	296	396	343	168	330	298	392	148	335	320
Royal Mail	274	119	52	103	258	180	263	209	96	226	178	262	72	211	218
	69%	74%	66%	66%	69%	69%	69%	65%	69%	71%	65%	70%	61%	68%	70%
UK Mail	14	*	5	8	14	10	14	12	7	13	12	14	4	14	12
	4%	%	7%	5%	4%	4%	4%	4%	5%	4%	4%	4%	4%	4%	4%
			a	a											
FedEx	11	5	-	6	11	6	11	10	4	8	11	11	6	9	10
	3%	3%	-%	4%	3%	2%	3%	3%	3%	2%	4%	3%	5%	3%	3%
UPS	11	5	2	3	11	6	11	9	2	8	7	9	7	8	7
	3%	3%	3%	2%	3%	2%	3%	3%	1%	2%	3%	2%	6%	3%	2%
													b		
TNT	9	2	4	3	9	7	9	9	2	7	7	9	6	9	7
	2%	1%	5%	2%	2%	3%	2%	3%	1%	2%	2%	2%	5%	3%	2%
Parcellforce	7	4	2	1	5	4	7	7	-	7	7	7	1	5	5
	2%	3%	2%	1%	1%	2%	2%	2%	-%	2%	3%	2%	1%	2%	2%
								e							
City Link Post	7	2	2	3	7	7	7	7	6	5	5	7	4	7	7
	2%	1%	3%	2%	2%	3%	2%	2%	4%	2%	2%	2%	3%	2%	2%
DHL	6	5	2	-	3	2	3	6	1	1	3	3	5	*	2
	2%	3%	2%	-%	1%	1%	1%	2%	1%	*%	1%	1%	4%	*%	1%
		c											b		
APC	6	2	3	1	6	3	6	5	4	6	4	5	1	5	4
	2%	2%	3%	1%	2%	1%	2%	2%	3%	2%	2%	1%	1%	2%	1%
Interlink / Interlink Express / Direct	5	2	-	3	5	2	5	5	2	5	5	5	-	5	4
	1%	1%	-%	2%	1%	1%	1%	2%	1%	2%	2%	1%	-%	2%	1%
DX	5	-	1	5	5	5	5	3	1	5	3	5	1	4	4
	1%	-%	1%	3%	1%	2%	1%	1%	1%	2%	1%	1%	1%	1%	1%
				a											
Hermes	4	-	-	4	2	-	2	4	-	4	4	2	-	-	2
	1%	-%	-%	3%	1%	-%	1%	1%	-%	1%	1%	1%	-%	-%	1%
				a											
Freight - Better / Night	4	2	-	2	4	4	4	4	-	4	4	4	2	4	4
	1%	1%	-%	1%	1%	2%	1%	1%	-%	1%	1%	1%	2%	1%	1%
Wey Group International	4	2	-	2	4	4	4	4	-	2	4	4	-	4	4
	1%	1%	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%
Local Courier	3	3	-	-	3	3	3	3	2	3	3	3	*	3	3
	1%	2%	-%	-%	1%	1%	1%	1%	1%	1%	1%	1%	*%	1%	1%
Tuffnells	2	2	-	-	2	2	2	2	*	*	2	2	*	2	2
	1%	1%	-%	-%	1%	1%	1%	1%	*%	*%	1%	1%	*%	1%	1%
Pitney Bowes	2	-	2	-	2	2	2	2	2	2	2	2	-	2	2
	*%	-%	2%	-%	*%	1%	*%	1%	1%	1%	1%	*%	-%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

Table 14 (continuation)

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	410	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	398	160	89	159	390	296	396	343	168	330	298	392	148	335	320
Priority Express	2	161	79	155	373	259	380	320	138	319	276	376	118	310	313
%	-	-	-	2	2	2	2	-	2	-	-	2	-	2	2
First Post	1	-	*	*	1	1	1	*	*	1	*	1	-	1	*
%	-	-	1%	*%	*%	*%	*%	*%	*%	*%	*%	*%	-	*%	*%
Parcels to go	*	-	-	*	*	-	*	*	-	-	*	*	*	-	*
%	-	-	-	*%	*%	-	*%	*%	-	-	*%	*%	*%	-	*%
Legal Post	*	-	*	-	*	*	*	-	-	*	-	*	-	*	-
%	-	-	1%	-	*%	*%	*%	-	-	*%	-	*%	-	*%	-
AJG Parcels	*	-	-	*	-	*	*	-	-	*	*	*	-	*	-
%	-	-	-	*%	-	*%	*%	-	-	*%	*%	*%	-	*%	-
DPD	*	*	-	-	*	*	*	*	*	*	*	*	*	*	*
%	-	*%	-	-	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
Yodel	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Haynes	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Business Post

-

-%

Parcel Live

-

-%

Other answers

21

5%

NET: RM

274

69%

NET: Provider other than

RM

124

31%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
410	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	160	89	159	390	296	396	343	168	330	298	392	148	335	320
Weighted total	398	161	79	155	373	259	380	320	138	319	276	376	118	310
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	21	6	4	9	19	11	20	17	10	15	15	20	9	17
5%	3%	5%	6%	5%	5%	4%	5%	5%	7%	5%	5%	5%	7%	5%
NET: RM	274	119	52	103	258	180	263	209	96	226	178	262	72	211
69%	74%	66%	66%	69%	69%	69%	65%	69%	69%	71%	65%	70%	61%	68%
NET: Provider other than														
RM	124	42	27	53	114	79	117	111	42	93	98	114	46	99
31%	26%	34%	34%	31%	31%	31%	35%	31%	29%	35%	30%	39%	32%	30%

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Table 14 (continuation)

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	77	12	319	404	372	405	359	410	-	293	405	174	71	47	290
Weighted total	398	74	310	388	350	390	338	398	-	262	392	143	69	44	283
Royal Mail	274	48	219	266	241	268	234	274	-	182	269	99	39	29	205
	69%	65%	71%	68%	69%	69%	69%	69%	-%	69%	69%	69%	56%	66%	73% a
UK Mail	14	6	8	14	14	14	12	14	-	9	14	4	8	*	5
	4%	8%	3%	4%	4%	4%	4%	4%	-%	4%	4%	3%	12%	1%	2%
FedEx	11	2	9	11	8	11	11	11	-	9	11	4	1	4	6
	3%	3%	3%	3%	2%	3%	3%	3%	-%	3%	3%	3%	2%	8%	2%
UPS	11	2	8	11	11	11	9	11	-	7	11	5	2	2	7
	3%	3%	3%	3%	3%	3%	3%	3%	-%	3%	3%	3%	3%	5%	2%
TNT	9	*	9	9	8	9	7	9	-	7	9	6	1	-	8
	2%	*%	3%	2%	2%	2%	2%	2%	-%	3%	2%	4%	2%	-%	3%
Parcellforce	7	-	5	7	7	7	7	7	-	7	7	1	2	-	5
	2%	-%	2%	2%	2%	2%	2%	2%	-%	3%	2%	1%	4%	-%	2%
City Link Post	7	-	7	7	7	7	5	7	-	3	7	2	*	*	6
	2%	-%	2%	2%	2%	2%	2%	2%	-%	1%	2%	2%	1%	1%	2%
DHL	6	-	4	6	3	6	5	6	-	3	6	6	-	-	5
	2%	-%	1%	2%	1%	2%	2%	2%	-%	1%	2%	4%	-%	-%	2%
APC	6	3	3	6	4	6	6	6	-	3	6	*	2	-	4
	2%	4%	1%	2%	1%	2%	2%	2%	-%	1%	2%	*%	3%	-%	2%
Interlink / Interlink Express / Direct	5	-	5	5	5	5	4	5	-	2	5	1	2	*	3
	1%	-%	2%	1%	2%	1%	1%	1%	-%	1%	1%	1%	3%	*%	1%
DX	5	-	5	5	5	5	3	5	-	4	5	1	2	1	2
	1%	-%	1%	1%	1%	1%	1%	1%	-%	2%	1%	*%	3%	3%	1%
Hermes	4	2	2	4	4	4	2	4	-	2	4	-	2	-	2
	1%	3%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	3%	-%	1%
Freight - Better / Night	4	-	4	4	2	4	4	4	-	4	4	-	-	2	2
	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	4%	1%
Wey Group International	4	2	2	4	2	4	4	4	-	4	4	2	2	-	2
	1%	2%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	3%	-%	1%
Local Courier	3	*	3	3	3	3	3	3	-	3	3	*	-	*	3
	1%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%	*%	-%	1%	1%
Tuffnells	2	-	2	2	2	2	2	2	-	2	2	2	*	-	2
	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	*%	-%	1%
Pitney Bowes	2	-	2	2	2	2	2	2	-	2	2	2	-	-	2
	*%	-%	1%	*%	1%	*%	1%	*%	-%	1%	*%	1%	-%	-%	1%
Priority Express	2	-	2	2	2	2	2	2	-	-	2	-	-	-	2
	*%	-%	1%	*%	1%	*%	1%	*%	-%	-%	*%	-%	-%	-%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	410	77	12	319	404	372	405	359	410	-	293	405	174	71	47	290
Weighted total	398	74	11	310	388	350	390	338	398	-	262	392	143	69	44	283
First Post	1	*	-	*	1	1	1	*	1	-	1	1	1	*	*	-
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	-%
Parcels to go	*	*	-	-	*	*	*	*	*	-	*	*	*	*	-	-
	1%	1%	-	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	-%
Legal Post	*	*	-	-	*	*	*	-	*	-	*	*	*	-	*	-
	1%	1%	-%	-%	1%	1%	1%	-%	1%	-%	1%	1%	1%	-%	1%	-%
AJG Parcels	*	-	-	*	*	*	*	*	*	-	*	*	*	-	-	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
DPD	*	-	-	*	*	*	*	*	*	-	*	*	*	-	-	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
Yodel	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Haynes	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	77	12	319	404	372	405	359	410	-	293	405	174	71	47	290
Weighted total	398	74	11	388	350	390	338	398	-	262	392	143	69	44	283
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	21	9	1	20	18	20	18	21	-	8	20	6	3	5	13
	5%	13%	12%	5%	5%	5%	5%	5%	-%	3%	5%	4%	5%	11%	5%
	c														
NET: RM	274	48	10	266	241	268	234	274	-	182	269	99	39	29	205
	69%	65%	88%	68%	69%	69%	69%	69%	-%	69%	69%	69%	56%	66%	73% a
NET: Provider other than RM	124	26	1	123	108	123	104	124	-	80	123	44	30	15	77
	31%	35%	12%	32%	31%	31%	31%	31%	-%	31%	31%	31%	44% c	34%	27%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?
Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	410	113	43	248	296	114	407	3	263	34	139	264	362	9
Weighted total	398	125	44	228	287	111	394	4	253	31	137	255	352	8
Royal Mail	274	69	31	173	191	83	271	2	180	20	94	179	236	4
	69%	55%	71%	76% a	66%	75%	69%	64%	71%	63%	69%	70%	67%	49%
UK Mail	14	8	2	4	11	3	14	-	10	-	6	8	14	-
	4%	7%	5%	2%	4%	2%	4%	-%	4%	-%	4%	3%	4%	-%
FedEx	11	4	4	2	9	2	11	-	8	2	7	4	11	-
	3%	4%	10% c	1%	3%	2%	3%	-%	3%	6%	5% b	2%	3%	-%
UPS	11	5	1	4	8	3	11	-	5	-	5	5	11	-
	3%	4%	3%	2%	3%	3%	3%	-%	2%	-%	4%	2%	3%	-%
TNT	9	2	*	6	9	*	9	-	5	*	3	6	9	*
	2%	2%	1%	3%	3%	-%	2%	-%	2%	1%	2%	2%	2%	1%
Parcellforce	7	3	-	4	4	3	7	-	3	*	*	5	7	*
	2%	2%	-%	2%	2%	3%	2%	-%	1%	2%	-%	2%	2%	6%
City Link Post	7	2	1	4	7	*	7	-	7	-	2	5	5	2
	2%	2%	2%	2%	2%	-%	2%	-%	3%	-%	2%	2%	1%	27%
DHL	6	4	*	2	3	3	6	-	4	*	2	2	5	1
	2%	4%	-%	1%	1%	3%	2%	-%	1%	-%	1%	1%	1%	16%
APC	6	1	-	6	5	1	6	-	2	2	3	4	6	-
	2%	-%	-%	2%	2%	1%	2%	-%	1%	6% a	2%	1%	2%	-%
Interlink / Interlink Express / Direct	5	3	*	2	3	2	5	-	3	*	*	5	5	-
	1%	3%	-%	1%	1%	2%	1%	-%	1%	-%	-%	2%	2%	-%
DX	5	*	-	4	4	1	4	1	4	1	2	2	5	-
	1%	-%	-%	2%	2%	1%	1%	36%	1%	3%	2%	1%	1%	-%
Hermes	4	4	-	-	2	2	4	-	2	-	-	4	4	-
	1%	3%	-%	-%	1%	2%	1%	-%	1%	-%	-%	2%	1%	-%
Freight - Better / Night	4	2	2	-	2	2	4	-	2	-	-	4	2	-
	1%	2%	4% c	-%	1%	2%	1%	-%	1%	-%	-%	2%	1%	-%
Wey Group International	4	2	-	2	4	-	4	-	2	-	2	2	4	-
	1%	1%	-%	1%	1%	-%	1%	-%	1%	-%	1%	1%	1%	-%
Local Courier	3	-	-	3	3	-	3	-	1	-	-	3	3	-
	1%	-%	-%	1%	1%	-%	1%	-%	1%	-%	-%	1%	1%	-%
Tuffnells	2	2	-	*	2	*	2	-	*	-	-	2	2	-
	1%	1%	-%	-%	1%	-%	1%	-%	-%	-%	-%	1%	1%	-%
Pitney Bowes	2	-	-	2	2	-	2	-	2	-	-	2	2	-
	-%	-%	-%	1%	1%	-%	-%	-%	1%	-%	-%	1%	1%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 14 (continuation)

Page 150

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	410	113	43	248	296	114	407	3	263	34	139	264	362	9
Weighted total	398	125	44	228	287	111	394	4	253	31	137	255	352	8
Priority Express	2	-	-	2	-	2	2	-	-	2	-	2	2	-
	-%	-%	-%	1%	-%	2%	-%	-%	-%	6%	-%	1%	1%	-%
						a				a				
First Post	1	1	-	-	*	*	1	-	-	1	*	*	1	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	2%	-%	-%	-%	-%
										a				
Parcels to go	*	*	-	-	-	*	*	-	-	-	*	-	*	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Legal Post	*	*	-	-	-	*	*	-	-	*	-	-	*	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	2%	-%	-%	-%	-%
										a				
AJG Parcels	*	*	-	-	*	-	*	-	-	-	*	-	*	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
DPD	*	*	-	*	*	*	*	-	*	-	-	*	*	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Yodel	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 14 (continuation)

Page 151

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	410	113	43	248	296	114	407	3	263	34	139	264	362	9
Weighted total	398	125	44	228	287	111	394	4	253	31	137	255	352	8
Haynes	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	21	11	*	10	19	2	21	-	11	4	8	13	21	-
	5%	9%	%	4%	7%	2%	5%	-%	4%	12%	6%	5%	6%	-%
NET: RM	274	69	31	173	191	83	271	2	180	20	94	179	236	4
	69%	55%	71%	76% a	66%	75%	69%	64%	71%	63%	69%	70%	67%	49%
NET: Provider other than RM	124	56	13	55	96	28	123	1	73	12	42	76	116	4
	31%	45% c	29%	24%	34%	25%	31%	36%	29%	37%	31%	30%	33%	51%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?
Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Royal Mail

UK Mail

FedEx

UPS

TNT

Parcelforce

City Link Post

DHL

APC

 Interlink / Interlink
Express / Direct

DX

Hermes

Freight - Better / Night

Wey Group International

Local Courier

Tuffnells

Pitney Bowes

Priority Express

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
410	125	120	93	72
398	111	115	89	83
274	80	89	59	46
69%	72%	77%	67%	55%
	d			
14	2	*	3	8
4%	2%	*%	4%	9%
				ab
11	-	7	1	2
3%	-%	6%	1%	3%
		a		
11	2	*	7	2
3%	2%	*%	8%	2%
			ab	
9	3	1	2	3
2%	2%	1%	3%	3%
7	*	-	3	4
2%	*%	-%	3%	5%
				ab
7	5	2	-	-
2%	5%	2%	-%	-%
	c			
6	*	-	1	5
2%	*%	-%	1%	6%
				ab
6	4	-	*	2
2%	4%	-%	1%	2%
	b			
5	3	*	2	-
1%	3%	*%	2%	-%
5	4	*	1	*
1%	3%	*%	1%	*%
4	-	-	2	2
1%	-%	-%	2%	3%
4	-	-	2	2
1%	-%	-%	2%	2%
4	2	-	2	-
1%	2%	-%	2%	-%
3	1	1	*	-
1%	1%	1%	1%	-%
2	*	2	-	-
1%	*%	2%	-%	-%
2	-	2	-	-
1%	-%	2%	-%	-%
2	2	-	-	-
1%	2%	-%	-%	-%

Ofcom: Business Postal Tracker

Table 14 (continuation)

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QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?
Base: All Respondents who use 2 or more mail service providers

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	410	125	120	93	72
Weighted total	398	111	115	89	83
First Post	1	*	*	-	-
	*%	*%	*%	-%	-%
Parcels to go	*	-	-	-	*
	*%	-%	-	-%	1%
Legal Post	*	-	*	-	-
	*%	-%	*%	-%	-%
AJG Parcels	*	-	-	-	*
	*%	-%	-%	-%	1%
DPD	*	-	*	*	-
	*%	-%	*%	*%	-%
Yodel	-	-	-	-	-
	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-
	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-
	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-
	-%	-%	-%	-%	-%
One Post	-	-	-	-	-
	-%	-%	-%	-%	-%
ENC	-	-	-	-	-
	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-
	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-
	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-
	-%	-%	-%	-%	-%
Euro	-	-	-	-	-
	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-
	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-
	-%	-%	-%	-%	-%
Haynes	-	-	-	-	-
	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-
	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-
	-%	-%	-%	-%	-%
Other answers	21	4	9	2	5
	5%	4%	8%	3%	6%

Columns Tested: a,b,c,d

QV5a. Which would you say is your organisation's main mail service provider in terms of the volume of items you send?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

NET: RM

NET: Provider other than

RM

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
410	125	120	93	72
398	111	115	89	83
274	80	89	59	46
69%	72%	77%	67%	55%
	d	d		
124	31	27	29	37
31%	28%	23%	33%	45%
				ab

Table 15
QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?
Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%
Unweighted total
Weighted total

Royal Mail

TNT

UK Mail

APC

FedEx

Parcellforce

UPS

DHL

Interlink / Interlink
Express / Direct

City Link Post

Wey Group International

Hermes

DX

Freight - Better / Night

Local Courier

Tuffnells

Pitney Bowes

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
410	*a	b	*c	d	e	f	g	*h	*i	j	k	*l	m
19	19	33	22	30	37	62	36	29	25	48	40	29	293
398	26	50	30	27	31	78	43	49	24	17	15	9	357
179	17	29	9	11	15	28	26	11	10	9	8	6	157
45%	64%	58%	32%	42%	47%	36%	61%	23%	42%	52%	51%	73%	44%
	f						fm						
29	5	1	2	-	3	9	2	4	1	2	*	*	27
7%	21%	1%	6%	-%	9%	11%	5%	9%	6%	10%	1%	1%	8%
						k							
23	-	6	2	1	1	6	-	5	-	1	1	-	21
6%	-%	13%	6%	6%	4%	7%	-%	9%	-%	4%	10%	-%	6%
		g											
16	-	1	-	-	3	4	-	6	1	*	*	-	15
4%	-%	1%	-%	-%	9%	5%	-%	13%	6%	3%	3%	-%	4%
15	2	-	4	1	2	2	*	4	*	-	-	-	15
4%	7%	-%	12%	6%	5%	3%	*%	9%	1%	-%	-%	-%	4%
14	-	2	4	1	*	2	-	4	-	*	*	*	13
4%	-%	4%	12%	5%	1%	2%	-%	9%	-%	3%	3%	1%	4%
14	-	2	2	3	-	2	2	*	1	1	*	-	12
3%	-%	4%	6%	10%	-%	3%	4%	1%	6%	6%	3%	-%	3%
				e									
13	-	2	2	-	3	2	2	2	-	*	*	*	13
3%	-%	4%	7%	-%	9%	2%	4%	4%	-%	3%	1%	1%	4%
9	-	-	*	1	1	2	2	-	1	*	1	-	8
2%	-%	-%	*%	5%	5%	2%	4%	-%	6%	1%	7%	-%	2%
8	-	-	2	*	-	-	-	4	-	1	*	-	6
2%	-%	-%	6%	1%	-%	-%	-%	9%	-%	9%	1%	-%	2%
										fm			
7	-	-	-	-	-	7	-	-	-	-	-	-	7
2%	-%	-%	-%	-%	-%	9%	-%	-%	-%	-%	-%	-%	2%
						jm							
6	-	-	-	-	-	2	-	2	1	*	*	-	5
2%	-%	-%	-%	-%	-%	2%	-%	4%	6%	3%	3%	-%	1%
5	-	-	*	3	-	-	-	-	*	1	*	*	3
1%	-%	-%	*%	11%	-%	-%	-%	-%	1%	4%	3%	6%	1%
				efgm									
4	-	-	-	-	-	-	2	2	-	-	-	-	4
1%	-%	-%	-%	-%	-%	-%	4%	4%	-%	-%	-%	-%	1%
3	-	-	-	3	-	-	-	-	-	-	-	*	3
1%	-%	-%	-%	10%	-%	-%	-%	-%	-%	-%	-%	6%	1%
				tjkm									
2	*	-	-	-	*	2	-	-	-	-	*	-	2
1%	1%	-%	-%	-	1%	2%	-%	-%	-%	-%	1%	-%	1%
2	-	-	-	-	-	-	2	-	-	-	-	-	2
*%	-%	-%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	1%
							m						

Table 15 (continuation)

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Priority Express

DPD

Haynes

First Post

Parcels to go

Legal Post

Yodel

MHI (Mail Handling International)

Eagle Couriers

Lynx

One Post

ENC

Fast Track

Neo Post

Fastway Couriers

Euro

UK / British Mail

Global Mailing

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
410	*a	b	*c	d	e	f	g	*h	*i	j	k	*l	m
Unweighted total	19	33	22	30	37	62	36	29	25	48	40	29	293
Weighted total	398	26	50	30	31	78	43	49	24	17	15	9	357
Priority Express	2	-	-	-	-	-	2	-	-	-	-	-	2
	*%	-%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	1%
DPD	1	*	-	-	-	*	-	1	-	-	-	*	1
	*%	-%	1%	-%	-%	*%	-%	1%	-%	-%	-%	1%	*%
Haynes	1	*	-	-	-	-	-	-	-	-	*	-	*
	*%	-%	1%	-%	-%	-%	-%	-%	-%	-%	3%	-%	*%
First Post	1	-	-	-	-	-	-	-	-	1	-	-	-
	*%	-%	-%	-%	-%	-%	-%	-%	-%	4%	-%	-%	-%
Parcels to go	*	-	-	-	-	-	-	-	-	m	*	-	-
	*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%
Legal Post	*	-	-	-	-	-	-	-	-	*	-	-	-
	*%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%
Yodel	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Business Post

AJG Parcels

Parcel Live

Other answers

NET: RM

NET: Provider other than RM

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
410	*a	b	*c	d	e	f	g	*h	*i	j	k	*l	m
Unweighted total	19	33	22	30	37	62	36	29	25	48	40	29	293
Weighted total	26	50	30	27	31	78	43	49	24	17	15	9	357
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
AJG Parcels	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	43	2	7	4	-	3	13	4	2	7	*	1	41
11%	7%	13%	12%	-%	9%	16%	8%	5%	29%	1%	7%	17%	11%
		dj				dj							j
NET: RM	179	17	29	9	11	15	28	26	11	10	9	8	6
45%	64%	58%	32%	42%	47%	36%	61%	23%	42%	52%	51%	73%	157
		f					fm						44%
NET: Provider other than RM	218	9	21	20	15	17	50	17	38	14	8	7	2
55%	36%	42%	68%	58%	53%	64%	39%	39%	77%	58%	48%	49%	27%
						bg							201
													56%
													9

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Table 15 (continuation)

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QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	410	271	81	27	14	17	139	295	115	376	34	156	107	57	90
Weighted total	398	374	13	5	2	3	23	303	95	382	16	174	110	53	61
Royal Mail	179	169	5	2	1	2	11	131	48	172	8	91	48	19	22
	45%	45%	40%	53%	58%	58%	46%	43%	51%	45%	50%	52%	43%	36%	36%
TNT	29	27	1	-	*	*	2	21	8	29	*	12	9	2	6
	7%	7%	9%	-%	15%	9%	8%	7%	8%	8%	2%	7%	8%	4%	9%
UK Mail	23	22	*	*	*	-	1	18	5	23	*	7	6	3	7
	6%	6%	2%	7%	5%	-%	3%	6%	5%	6%	1%	4%	6%	5%	11%
												cd			a
APC	16	15	1	*	-	*	1	13	4	16	*	8	4	4	1
	4%	4%	6%	7%	-%	7%	6%	4%	4%	4%	2%	4%	3%	8%	1%
FedEx	15	14	1	*	*	*	1	12	3	15	*	6	1	5	2
	4%	4%	6%	4%	6%	5%	6%	4%	3%	4%	1%	3%	1%	10%	4%
Parcellforce	14	14	*	-	*	-	*	12	3	14	-	8	2	*	4
	4%	4%	2%	-%	8%	-%	2%	4%	3%	4%	-%	5%	2%	*%	6%
UPS	14	13	1	-	-	*	1	10	4	13	1	4	4	2	4
	3%	3%	5%	-%	-%	11%	4%	3%	4%	3%	3%	2%	4%	3%	7%
DHL	13	13	*	*	-	*	1	9	4	13	*	7	4	*	2
	3%	3%	1%	2%	-%	10%	2%	3%	4%	3%	2%	4%	4%	*%	3%
Interlink / Interlink Express / Direct	9	8	1	*	-	-	1	7	2	9	*	1	2	4	2
	2%	2%	4%	3%	-%	-%	3%	2%	2%	2%	1%	1%	2%	7%	3%
City Link Post	8	7	*	*	-	-	*	5	3	8	-	*	3	2	2
	2%	2%	1%	4%	-%	-%	1%	2%	3%	2%	-%	*%	2%	4%	4%
Wey Group International	7	7	-	-	-	-	-	7	-	5	2	4	2	-	2
	2%	2%	-%	-%	-%	-%	-%	2%	-%	1%	11%	2%	2%	-%	3%
Hermes	6	6	-	-	-	-	-	4	3	5	1	3	3	-	-
	2%	2%	-%	-%	-%	-%	-%	1%	3%	1%	8%	2%	3%	-%	-%
DX	5	4	*	*	-	-	1	4	*	4	*	2	1	1	1
	1%	1%	3%	8%	-%	-%	4%	1%	1%	1%	3%	1%	1%	1%	1%
Freight - Better / Night	4	4	-	-	-	-	-	2	2	4	-	-	2	-	2
	1%	1%	-%	-%	-%	-%	-%	1%	2%	1%	-%	-%	2%	-%	3%
Local Courier	3	3	-	-	-	-	-	3	*	3	-	1	1	-	*
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-%	1%	1%	-%	1%
Tuffnells	2	2	*	*	-	-	*	2	*	2	-	-	*	2	*
	1%	*%	1%	5%	-%	-%	2%	1%	*%	1%	-%	-%	*%	4%	*%
Pitney Bowes	2	2	-	-	-	-	-	2	-	2	-	-	2	-	-
	*%	*%	-%	-%	-%	-%	-%	1%	-%	*%	-%	-%	2%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 15 (continuation)

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QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	410	271	81	27	14	17	139	295	115	376	34	156	107	57	90
Weighted total	398	374	13	5	2	3	23	303	95	382	16	174	110	53	61
Priority Express	2	2	-	-	-	-	-	2	-	2	-	-	2	-	-
	*%	*%	-%	-%	-%	-%	-%	1%	-%	*%	-%	-%	2%	-%	-%
DPD	1	-	1	*	-	-	1	1	1	1	-	*	-	1	*
	*%	-%	8%	3%	-%	-%	5%	*%	1%	*%	-%	*%	-%	1%	*%
Haynes	1	*	*	-	-	-	*	-	1	*	*	-	-	*	*
	*%	*%	2%	-%	-%	-%	1%	-%	1%	*%	2%	-%	-%	1%	1%
First Post	1	*	*	-	-	-	*	1	-	1	-	*	-	-	*
	*%	*%	1%	-%	-%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%
Parcels to go	*	*	-	-	-	-	-	-	*	*	-	-	-	*	-
	*%	*%	-%	-%	-%	-%	-%	-%	1%	*%	-%	-%	-%	1%	-%
Legal Post	*	*	-	-	-	-	-	*	-	*	-	*	-	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	*%	-%	-%	-%
Yodel	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-	-%	-%	-%	-%
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
AJG Parcels	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%	a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	410	271	81	27	14	17	295	115	376	34	156	107	57	90
Weighted total	398	374	13	5	2	3	303	95	382	16	174	110	53	61
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	43	41	1	*	*	2	38	5	41	2	19	13	7	4
	11%	11%	11%	5%	8%	8%	13%	6%	11%	14%	11%	12%	14%	7%
							b							
NET: RM	179	169	5	2	1	2	131	48	172	8	91	48	19	22
	45%	45%	40%	53%	58%	46%	43%	51%	45%	50%	52%	43%	36%	36%
											cd			
NET: Provider other than RM	218	206	8	2	1	12	171	47	210	8	84	62	34	39
	55%	55%	60%	47%	42%	54%	57%	49%	55%	50%	48%	57%	64%	64%
													a	a

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 15 (continuation)

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	410	103	83	65	70	51	30	8	268	46	30	33	33	291	116	197	211
Weighted total	398	127	84	65	62	44	12	4	275	38	31	31	23	274	123	179	217
Royal Mail	179	45	36	33	34	21	6	3	139	13	8	12	7	171	8	179	-
	45%	36%	43%	51%	55%	47%	54%	85%	51%	35%	26%	37%	32%	63%	6%	100%	-%
				a	a				ce					b		b	
TNT	29	10	12	-	2	5	1	*	23	2	2	2	*	20	9	-	29
	7%	8%	14%	-%	3%	11%	5%	8%	8%	5%	7%	7%	-%	7%	7%	-%	13%
		c	cd		c												a
UK Mail	23	4	4	4	5	6	*	*	12	3	-	2	7	9	14	-	23
	6%	3%	5%	6%	8%	13%	4%	3%	4%	7%	-%	6%	30%	3%	11%	-%	11%
					a	a							abcd		a		a
APC	16	5	2	5	*	4	-	-	8	1	3	2	2	10	6	-	16
	4%	4%	3%	7%	-%	10%	-%	-%	3%	2%	11%	7%	7%	4%	5%	-%	7%
				d	d						a						a
FedEx	15	5	6	*	4	*	*	-	9	*	2	2	2	5	10	-	15
	4%	4%	7%	-%	6%	-%	1%	-%	3%	-%	6%	7%	10%	2%	9%	-%	7%
			c										b		a		a
Parcellforce	14	10	*	3	-	1	*	-	11	-	-	2	1	8	7	-	14
	4%	8%	-%	4%	-%	3%	2%	-%	4%	-%	-%	7%	6%	3%	6%	-%	7%
		bd															a
UPS	14	5	3	4	-	2	-	-	7	2	2	3	*	4	10	-	14
	3%	4%	3%	6%	-%	4%	-%	-%	3%	4%	6%	10%	1%	1%	8%	-	6%
				d								a			a		a
DHL	13	9	1	2	*	-	-	-	10	2	2	-	-	7	6	-	13
	3%	7%	2%	3%	1%	-%	-%	-%	3%	5%	6%	-%	-%	2%	5%	-%	6%
		de															a
Interlink / Interlink Express / Direct	9	2	*	2	5	-	*	-	2	3	2	*	2	4	5	-	9
	2%	1%	-%	4%	7%	-%	2%	-%	1%	8%	6%	1%	7%	1%	4%	-%	4%
				abe						a	a		a				a
City Link Post	8	4	1	-	2	-	-	*	3	-	2	2	*	3	5	-	8
	2%	3%	1%	-%	4%	-%	-%	5%	1%	-%	7%	7%	1%	1%	4%	-%	4%
											a	a			a		a
Wey Group International	7	4	-	4	-	-	-	-	5	-	2	-	-	4	4	-	7
	2%	3%	-%	6%	-%	-%	-%	-%	2%	-%	6%	-%	-%	1%	3%	-%	3%
				bd													a
Hermes	6	6	-	-	-	*	-	-	6	-	-	-	-	2	4	-	6
	2%	4%	-%	-%	-%	1%	-%	-%	2%	-%	-%	-%	-%	1%	3%	-%	3%
																	a
DX	5	*	1	-	*	1	2	-	4	*	-	*	-	2	3	-	5
	1%	-%	2%	-%	1%	3%	14%	-%	2%	1%	-%	1%	-%	1%	2%	-%	2%
						abcd											a
Freight - Better / Night	4	2	-	2	-	-	-	-	2	-	-	2	-	-	4	-	4
	1%	1%	-%	3%	-%	-%	-%	-%	1%	-%	-%	7%	-%	-%	3%	-%	2%
												a			a		
Local Courier	3	-	-	1	2	-	-	-	3	-	-	*	-	-	3	-	3
	1%	-%	-%	2%	3%	-%	-%	-%	1%	-%	-%	2%	-%	-%	3%	-%	1%
															a		

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 15 (continuation)

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QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	410	103	83	65	70	51	30	8	268	46	30	33	33	291	116	197	211
Weighted total	398	127	84	65	62	44	12	4	275	38	31	31	23	274	123	179	217
Tuffnells	2 1%	2 1%	- -%	* *%	* *%	* *%	- -%	- -%	- -%	* *%	2 6%	* *%	* 1%	* *%	2 2%	- -%	2 1%
Pitney Bowes	2 *%	- -%	- -%	- -%	- -%	- -%	2 15%	- -%	2 1%	- -%	- -%	- -%	- -%	- -%	2 1%	- -%	2 1%
Priority Express	2 *%	- -%	2 2%	- -%	- -%	- -%	- -%	- -%	- -%	2 5%	- -%	- -%	- -%	- -%	2 1%	- -%	2 1%
DPD	1 *%	- -%	* *%	- -%	* *%	* 1%	* 3%	- -%	1 *%	- -%	* 1%	* *%	* 1%	1 *%	* *%	- -%	1 1%
Haynes	1 *%	- -%	- -%	- -%	- -%	1 2%	- -%	- -%	* *%	- -%	- -%	- -%	* 1%	1 *%	- -%	- -%	1 *%
First Post	1 *%	- -%	- -%	- -%	- -%	- 1%	* 1%	- -%	* *%	- -%	- -%	* *%	- -%	- -%	1 *%	- -%	1 *%
Parcels to go	* *%	* *%	- -%	- -%	- -%	- -%	- -%	- -%	* *%	- -%	- -%	- -%	- -%	- -%	* *%	- -%	* *%
Legal Post	* *%	- -%	- -%	- -%	- -%	* 1%	- -%	- -%	* *%	- -%	- -%	- -%	- -%	- -%	* *%	- -%	* *%
Yodel	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
MHI (Mail Handling International)	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Eagle Couriers	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Lynx	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
One Post	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
ENC	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Fast Track	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Neo Post	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Fastway Couriers	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Euro	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
UK / British Mail	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 15 (continuation)

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QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	410	103	83	65	70	51	30	8	268	46	30	33	33	291	116	197	211
Weighted total	398	127	84	65	62	44	12	4	275	38	31	31	23	274	123	179	217
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
AJG Parcels	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	43	15	13	4	8	2	*	-	30	9	4	1	*	24	19	-	43
	11%	12%	16%	7%	14%	4%	3%	-%	11%	23%	12%	2%	2%	9%	16%	-%	20%
			e							ade					a		a
NET: RM	179	45	36	33	34	21	6	3	139	13	8	12	7	171	8	179	-
	45%	36%	43%	51%	55%	47%	54%	85%	51%	35%	26%	37%	32%	63%	6%	100%	-%
				a	a				ce					b		b	
NET: Provider other than RM	218	82	48	31	28	23	5	1	136	25	23	20	15	102	115	-	217
	55%	64%	57%	49%	45%	53%	46%	15%	49%	65%	74%	63%	68%	37%	94%	-%	100%
		cd								a	a		a	a		a	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 15 (continuation)

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	410	160	89	159	390	296	396	343	168	330	298	392	148	335	320
Weighted total	398	161	79	155	373	259	380	320	138	319	276	376	118	310	313
Royal Mail	179	69	37	73	168	128	173	131	61	144	117	172	53	138	150
	45%	43%	47%	47%	45%	49%	45%	41%	44%	45%	42%	46%	45%	45%	48%
TNT	29	14	6	9	27	15	27	22	6	23	18	27	8	26	18
	7%	9%	7%	6%	7%	6%	7%	7%	4%	7%	7%	7%	7%	8%	6%
UK Mail	23	6	8	9	23	13	23	18	9	20	17	23	5	19	18
	6%	4%	10%	6%	6%	5%	6%	6%	7%	6%	6%	6%	4%	6%	6%
APC	16	5	6	6	16	4	16	15	12	15	14	15	3	13	12
	4%	3%	7%	4%	4%	2%	4%	b	8%	5%	5%	4%	3%	4%	4%
FedEx	15	5	1	10	15	10	15	14	4	10	15	15	7	13	12
	4%	3%	1%	6%	4%	4%	4%	4%	3%	3%	5%	4%	6%	4%	4%
Parcellforce	14	9	2	4	12	12	14	14	1	12	12	14	4	8	12
	4%	5%	2%	3%	3%	5%	4%	5%	1%	4%	4%	4%	3%	2%	4%
UPS	14	6	2	5	14	6	14	12	3	12	9	12	7	11	10
	3%	4%	3%	3%	4%	2%	4%	4%	2%	4%	3%	3%	6%	4%	3%
DHL	13	9	2	2	8	7	8	11	4	6	8	8	8	5	5
	3%	6%	3%	1%	2%	3%	2%	3%	3%	2%	3%	2%	b	2%	1%
Interlink / Interlink Express / Direct	9	5	*	3	9	5	9	9	2	9	7	9	*	9	8
	2%	3%	1%	2%	2%	2%	2%	3%	1%	3%	2%	2%	2%	3%	2%
City Link Post	8	2	3	3	8	7	8	8	7	6	8	8	4	8	8
	2%	1%	3%	2%	2%	3%	2%	2%	5%	2%	3%	2%	4%	3%	2%
Wey Group International	7	4	-	4	7	5	7	5	2	5	4	7	2	7	4
	2%	2%	-%	2%	2%	2%	2%	2%	1%	2%	1%	2%	2%	2%	1%
Hermes	6	1	*	4	4	2	4	6	*	6	6	4	-	2	3
	2%	1%	1%	3%	1%	1%	1%	2%	2%	2%	2%	1%	-%	1%	1%
DX	5	*	1	4	5	5	5	2	1	5	1	5	1	3	4
	1%	1%	1%	3%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Freight - Better / Night	4	2	-	2	4	4	4	4	-	4	4	4	2	4	4
	1%	1%	-%	1%	1%	2%	1%	1%	-%	1%	1%	1%	2%	1%	1%
Local Courier	3	3	-	-	3	3	3	3	2	3	3	3	*	3	3
	1%	2%	-%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Tuffnells	2	2	-	*	2	2	2	2	*	*	2	2	*	2	2
	1%	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Pitney Bowes	2	-	2	-	2	2	2	2	2	2	2	2	-	2	2
	1%	-%	2%	-%	1%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

Table 15 (continuation)

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	410	160	89	159	390	296	396	343	168	330	298	392	148	335	320
Weighted total	398	161	79	155	373	259	380	320	138	319	276	376	118	310	313
Priority Express	2	-	-	2	2	2	2	-	-	2	-	2	-	2	2
	*%	-%	-%	1%	*%	1%	*%	1%	-%	1%	-%	*%	-%	1%	1%
DPD	1	1	*	*	1	1	1	1	1	1	1	1	1	1	1
	*%	*%	*%	*%	*%	*%	*%	1%	1%	*%	*%	*%	1%	*%	*%
Haynes	1	-	-	1	1	1	*	-	*	*	*	1	-	1	1
	*%	-%	-%	1%	*%	*%	-%	-%	*%	*%	*%	*%	-%	*%	-%
First Post	1	-	*	*	1	1	1	*	*	1	*	1	-	1	*
	*%	-%	1%	*%	*%	*%	*%	*%	*%	*%	*%	*%	-%	*%	*%
Parcels to go	*	-	-	*	*	*	*	-	-	*	*	*	*	-	*
	*%	-%	-%	*%	*%	-%	*%	-%	-%	-%	*%	*%	*%	-%	*%
Legal Post	*	-	*	*	*	*	*	-	*	*	-	*	*	*	-
	*%	-%	1%	-%	*%	*%	*%	-%	-%	*%	-%	*%	-%	*%	-%
Yodel	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

AJG Parcels

Parcel Live

Other answers

NET: RM

NET: Provider other than

RM

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
410	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	160	89	159	390	296	396	343	168	330	298	392	148	335	320
Weighted total	161	79	155	373	259	380	320	138	319	276	376	118	310	313
AJG Parcels	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	43	19	8	42	24	42	39	22	36	29	42	12	35	38
11%	12%	10%	9%	11%	9%	11%	12%	16%	11%	11%	11%	10%	11%	12%
NET: RM	179	69	37	168	128	173	131	61	144	117	172	53	138	150
45%	43%	47%	47%	45%	49%	45%	41%	44%	45%	42%	46%	45%	45%	48%
NET: Provider other than					d									
RM	218	92	42	205	131	207	189	77	175	159	204	64	171	164
55%	57%	53%	53%	55%	51%	55%	59%	56%	55%	58%	54%	55%	55%	52%

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Table 15 (continuation)

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	410	77	12	319	404	372	405	359	410	-	293	405	174	71	47	290
Weighted total	398	74	11	310	388	350	390	338	398	-	262	392	143	69	44	283
Royal Mail	179	35	7	140	172	152	174	147	179	-	117	176	73	28	15	136
	45%	48%	62%	45%	44%	44%	45%	43%	45%	-%	45%	45%	51%	41%	34%	48%
TNT	29	6	*	23	29	26	29	26	29	-	20	29	8	3	2	24
	7%	8%	2%	8%	8%	7%	7%	8%	7%	-%	8%	7%	6%	4%	4%	9%
UK Mail	23	7	*	16	23	21	23	20	23	-	14	23	7	13	*	10
	6%	9%	4%	5%	6%	6%	6%	6%	6%	-%	5%	6%	5%	19%	1%	3%
														bc		
APC	16	3	2	11	16	14	16	16	16	-	9	16	3	2	2	12
	4%	4%	19%	4%	4%	4%	4%	5%	4%	-%	3%	4%	2%	3%	5%	4%
FedEx	15	2	-	13	15	13	15	15	15	-	13	15	5	1	7	7
	4%	3%	-%	4%	4%	4%	4%	5%	4%	-%	5%	4%	4%	2%	17%	2%
														ac		
Parcellforce	14	-	-	12	14	14	14	14	14	-	12	14	4	4	1	9
	4%	-%	-%	4%	4%	4%	4%	4%	4%	-%	5%	4%	3%	6%	3%	3%
UPS	14	3	-	11	14	14	14	12	14	-	10	14	5	2	3	9
	3%	4%	-%	3%	4%	4%	4%	4%	3%	-%	4%	4%	4%	3%	6%	3%
DHL	13	-	-	11	11	8	11	8	13	-	8	11	9	-	-	12
	3%	-%	-%	3%	3%	2%	3%	2%	3%	-%	3%	3%	6%	-%	-%	4%
													b			
Interlink / Interlink Express / Direct	9	1	-	8	9	9	9	6	9	-	4	9	3	3	*	6
	2%	2%	-%	3%	2%	3%	2%	2%	2%	-%	1%	2%	2%	4%	4%	2%
City Link Post	8	-	-	8	8	8	8	6	8	-	4	8	3	1	*	7
	2%	-%	-%	3%	2%	2%	2%	2%	2%	-%	1%	2%	2%	1%	1%	2%
Wey Group International	7	2	-	5	7	5	7	7	7	-	5	7	4	2	-	5
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	3%	3%	-%	2%
Hermes	6	2	-	4	6	6	6	4	6	-	4	6	-	2	-	4
	2%	3%	-%	1%	2%	2%	2%	1%	2%	-%	1%	2%	-%	3%	-%	2%
DX	5	1	-	3	5	5	5	3	5	-	4	5	*	-	2	3
	1%	2%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	4%	1%
Freight - Better / Night	4	-	-	4	4	2	4	4	4	-	4	4	-	-	2	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	4%	1%
Local Courier	3	*	-	3	3	3	3	3	3	-	3	3	*	-	*	3
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%
Tuffnells	2	-	-	2	2	2	2	2	2	-	2	2	2	*	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	1%
Pitney Bowes	2	-	-	2	2	2	2	2	2	-	2	2	2	-	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
Priority Express	2	-	-	2	2	2	2	2	2	-	-	2	-	-	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	-	1%	-	-	-%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 15 (continuation)

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QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	410	77	12	319	404	372	405	359	410	-	293	405	174	71	47	290
Weighted total	398	74	11	310	388	350	390	338	398	-	262	392	143	69	44	283
DPD	1	*	-	1	1	1	1	1	1	-	1	1	1	*	-	1
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	1%
Haynes	1	*	-	*	1	1	1	1	1	-	1	1	-	-	*	*
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	1%	1%
First Post	1	*	-	*	1	1	1	*	1	-	1	1	1	*	*	-
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	-%
Parcels to go	*	*	-	-	*	*	*	*	*	-	*	*	*	*	-	-
	1%	1%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	-%
Legal Post	*	*	-	-	*	*	*	-	*	-	*	*	*	-	*	-
	1%	1%	-%	-%	1%	1%	1%	-%	1%	-%	1%	1%	1%	-%	1%	-%
Yodel	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
AJG Parcels	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Parcel Live

-

-%

Other answers

NET: RM

NET: Provider other than

RM

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
410	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	77	12	319	404	372	405	359	410	-	293	405	174	71	47	290
Weighted total	398	74	11	388	350	390	338	398	-	262	392	143	69	44	283
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	43	12	1	43	40	43	41	43	-	26	43	15	6	8	29
11%	16%	13%	10%	11%	12%	11%	12%	11%	-%	10%	11%	10%	8%	19%	10%
NET: RM	179	35	7	172	152	174	147	179	-	117	176	73	28	15	136
45%	48%	62%	45%	44%	44%	45%	43%	45%	-%	45%	45%	51%	41%	34%	48%
NET: Provider other than	218	39	4	216	197	216	191	218	-	145	216	70	41	29	147
RM	55%	52%	38%	56%	56%	55%	57%	55%	-%	55%	55%	49%	59%	66%	52%

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Table 15 (continuation)

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QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?
Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	410	113	43	248	296	114	407	3	263	34	139	264	362	9
Weighted total	398	125	44	228	287	111	394	4	253	31	137	255	352	8
Royal Mail	179	38	16	125	123	56	178	2	126	15	63	116	154	5
	45%	31%	36%	55% ab	43%	51%	45%	50%	50%	47%	46%	46%	44%	57%
TNT	29	8	4	17	22	7	29	-	15	*	8	21	23	*
	7%	7%	10%	7%	8%	7%	7%	-%	6%	1%	6%	8%	7%	1%
UK Mail	23	10	3	10	20	3	23	-	16	-	11	12	21	-
	6%	8%	7%	4%	7%	3%	6%	-%	6%	-%	8%	5%	6%	-%
APC	16	8	2	6	14	2	16	-	8	2	8	8	16	-
	4%	6%	5%	3%	5%	2%	4%	-%	3%	6%	6%	3%	5%	-%
FedEx	15	4	4	7	11	4	15	-	8	5	11	4	15	-
	4%	4%	10%	3%	4%	4%	4%	-%	3%	17% a	8%	2%	4%	-%
Parcellforce	14	5	3	6	12	2	14	-	6	1	3	9	14	-
	4%	4%	8%	3%	4%	2%	4%	-%	3%	2%	2%	4%	4%	-%
UPS	14	5	1	8	10	4	14	-	8	1	7	7	13	*
	3%	4%	3%	3%	3%	4%	3%	-%	3%	2%	5%	3%	4%	6%
DHL	13	8	*	5	10	3	13	-	10	*	2	9	12	1
	3%	7%	*%	2%	4%	3%	3%	-%	4%	*%	1%	3%	3%	16%
		c												
Interlink / Interlink Express / Direct	9	7	*	2	7	2	9	-	6	*	*	9	7	-
	2%	5%	*%	1%	2%	2%	2%	-%	2%	*%	*%	4%	2%	-%
		c										a		
City Link Post	8	-	1	7	5	3	8	-	5	-	-	8	5	*
	2%	-%	3%	3%	2%	3%	2%	-%	2%	-%	-%	3%	2%	2%
												a		
Wey Group International	7	2	-	5	7	-	7	-	5	-	4	4	7	-
	2%	1%	-%	2%	2%	-%	2%	-%	2%	-%	3%	1%	2%	-%
Hermes	6	6	-	*	4	3	6	-	4	-	*	6	6	-
	2%	5%	-%	*%	1%	2%	2%	-%	2%	-%	*%	2%	2%	-%
		c												
DX	5	1	-	4	3	2	4	1	4	*	*	4	4	1
	1%	*%	-%	2%	1%	2%	1%	36%	1%	2%	*%	1%	1%	16%
Freight - Better / Night	4	2	2	-	2	2	4	-	2	-	-	4	2	-
	1%	2%	4%	-%	1%	2%	1%	-%	1%	-%	-%	2%	1%	-%
		c	c											
Local Courier	3	-	-	3	3	-	3	-	1	-	-	3	3	-
	1%	-%	-%	1%	1%	-%	1%	-%	1%	-%	-%	1%	1%	-%
Tuffnells	2	2	-	*	2	*	2	-	*	-	-	2	2	-
	1%	1%	-%	*%	1%	*%	1%	-%	*%	-%	-	1%	1%	-%
Pitney Bowes	2	-	-	2	2	-	2	-	2	-	-	2	2	-
	*%	-%	-%	1%	1%	-%	*%	-%	1%	-%	-%	1%	1%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 15 (continuation)

Page 171

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	410	113	43	248	296	114	407	3	263	34	139	264	362	9
Weighted total	398	125	44	228	287	111	394	4	253	31	137	255	352	8
Priority Express	2	-	-	2	-	2	2	-	-	2	-	2	2	-
	*%	-%	-%	1%	-%	2%	*%	-%	-%	6%	-%	1%	1%	-%
DPD	1	1	*	*	1	*	1	-	1	*	*	1	1	-
	*%	1%	*%	*%	*%	*%	*%	-%	*%	1%	*%	*%	*%	-%
Haynes	1	-	*	*	1	-	1	-	*	*	1	-	*	-
	*%	-%	1%	*%	*%	-%	*%	-%	*%	2%	1%	-%	*%	-%
First Post	1	1	-	-	*	*	1	-	-	1	*	*	1	-
	*%	*%	-%	-%	*%	*%	*%	-%	-%	2%	*%	*%	*%	-%
Parcels to go	*	*	-	-	-	*	*	-	-	-	*	-	*	-
	*%	*%	-%	-%	-%	*%	*%	-%	-%	-%	*%	-%	*%	-%
Legal Post	*	*	-	-	-	*	*	-	-	*	*	-	*	-
	*%	*%	-%	-%	-%	*%	*%	-%	-%	2%	-%	*%	*%	-%
Yodel	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
MHI (Mail Handling International)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Eagle Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
One Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
ENC	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Neo Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fastway Couriers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 15 (continuation)

Page 172

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	410	113	43	248	296	114	407	3	263	34	139	264	362	9
Weighted total	398	125	44	228	287	111	394	4	253	31	137	255	352	8
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
AJG Parcels	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	43	18	4	21	31	12	43	*	25	4	17	26	43	-
	11%	14%	10%	9%	11%	11%	11%	13%	10%	13%	12%	10%	12%	-%
NET: RM	179	38	16	125	123	56	178	2	126	15	63	116	154	5
	45%	31%	36%	55%	43%	51%	45%	50%	50%	47%	46%	46%	44%	57%
				ab										
NET: Provider other than RM	218	87	28	103	164	54	216	2	127	16	73	139	198	3
	55%	69%	64%	45%	57%	49%	55%	50%	50%	53%	54%	54%	56%	43%
		c	c											

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 15 (continuation)

Page 173

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?
Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Royal Mail

TNT

UK Mail

APC

FedEx

Parcelforce

UPS

DHL

Interlink / Interlink

Express / Direct

City Link Post

Wey Group International

Hermes

DX

Freight - Better / Night

Local Courier

Tuffnells

Pitney Bowes

Priority Express

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
410	125	120	93	72
398	111	115	89	83
179	60	56	35	29
45%	54%	48%	39%	35%
	cd			
29	8	9	7	5
7%	7%	8%	8%	6%
23	4	6	3	10
6%	3%	5%	4%	12%
				ac
16	4	6	5	2
4%	4%	5%	6%	2%
15	-	10	2	4
4%	-%	9%	2%	4%
		ac		a
14	5	*	4	6
4%	4%	*%	4%	7%
	b		b	b
14	4	*	7	2
3%	3%	*%	8%	3%
			b	
13	2	2	2	7
3%	2%	2%	2%	9%
				ab
9	5	*	4	-
2%	4%	*%	5%	-%
	b		b	
8	3	2	-	3
2%	3%	2%	-%	3%
7	2	2	2	2
2%	2%	2%	2%	2%
6	1	-	2	3
2%	1%	-%	2%	4%
				b
5	3	*	1	*
1%	3%	*%	1%	*%
4	-	-	2	2
1%	-%	-%	2%	2%
3	1	1	*	-
1%	1%	1%	1%	-%
2	*	2	*	-
1%	*%	2%	*%	-%
2	-	2	-	-
1%	-%	2%	-%	-%
2	2	-	-	-
1%	2%	-%	-%	-%

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OFC1885

Issue date: 03/07/13

Ofcom: Business Postal Tracker

Table 15 (continuation)

Page 174

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?
Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

DPD

Haynes

First Post

Parcels to go

Legal Post

Yodel

 MHI (Mail Handling
International)

Eagle Couriers

Lynx

One Post

ENC

Fast Track

Neo Post

Fastway Couriers

Euro

UK / British Mail

Global Mailing

Business Post

AJG Parcels

Parcel Live

Other answers

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
410	125	120	93	72
398	111	115	89	83
1	*	*	*	-
*%	*%	*%	1%	-%
1	1	-	-	-
*%	1%	-%	-%	-%
1	*	*	-	-
*%	*%	*%	-%	-%
*	-	-	-	*
*%	-%	-%	-%	1%
*	-	*	-	-
*%	-%	*%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
43	8	16	13	7
11%	7%	14%	15%	8%

Produced by OLR

OFC1885

Issue date: 03/07/13

QV5b. Which would you say is your organisation's main mail service provider in terms of the value of your contract with them?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%
Unweighted total
Weighted total
NET: RM

NET: Provider other than
RM

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
410	125	120	93	72
398	111	115	89	83
179	60	56	35	29
45%	54%	48%	39%	35%
	cd			
218	51	60	54	54
55%	46%	52%	61%	65%
			a	a

Table 16
Page 176
QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?
Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%
Unweighted total
Weighted total

TNT

Parcellforce

UPS

UK Mail

DHL

FedEx

APC

Interlink / Interlink
Express / Direct

DX

Hermes

City Link Post

Local Courier

Pitney Bowes

Wey Group International

Freight - Better / Night

DPD

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
437	*a	b	*c	d	e	f	g	h	*i	j	k	l	m
Unweighted total	19	36	23	31	40	66	38	30	27	51	44	32	310
Weighted total	422	26	55	31	28	35	80	47	51	25	18	9	378
52	6	5	4	*	6	14	6	6	1	3	1	*	49
12%	22%	10%	11%	1%	17%	18%	13%	12%	5%	14%	4%	5%	13%
					d	dk				d			d
42	2	4	7	3	3	5	5	6	1	2	1	1	38
10%	7%	8%	23%	10%	8%	7%	12%	12%	5%	9%	9%	13%	10%
33	2	7	4	3	1	11	2	*	1	1	*	-	32
8%	7%	12%	12%	11%	4%	14%	4%	1%	6%	5%	3%	-%	8%
						hl							
30	4	6	2	1	1	6	*	5	3	1	1	-	27
7%	14%	12%	6%	5%	4%	7%	7%	9%	10%	3%	9%	-%	7%
		g											
27	-	5	2	1	3	6	4	2	1	1	*	2	24
6%	-%	8%	7%	5%	8%	7%	8%	4%	5%	8%	2%	19%	6%
												km	
26	2	2	2	1	4	4	*	4	3	1	1	*	23
6%	7%	4%	6%	5%	12%	5%	7%	8%	13%	5%	4%	5%	6%
					g								
22	-	3	-	-	4	4	-	6	3	1	1	-	20
5%	-%	5%	-%	-	13%	5%	-%	12%	10%	5%	4%	-%	5%
					dgl			dgl					
21	-	*	*	5	1	2	7	*	1	*	3	-	18
5%	-%	1%	7%	19%	4%	2%	16%	1%	5%	1%	18%	-%	5%
				bthjlm			bthjlm				bthjlm		
17	-	2	*	3	-	-	6	2	*	1	1	1	14
4%	-%	4%	1%	11%	-%	-%	12%	4%	2%	7%	5%	15%	4%
				efm			efm			f		efm	
16	4	2	-	-	-	2	2	4	1	*	*	-	15
4%	14%	4%	-%	-%	-%	2%	4%	8%	5%	3%	3%	-%	4%
15	-	-	2	1	1	2	-	6	-	2	1	-	13
4%	-%	-%	6%	5%	4%	2%	-%	12%	-%	11%	4%	-%	3%
							bfglm			bgm			
9	-	-	-	3	-	2	2	-	-	2	1	*	6
2%	-%	-%	-%	9%	-%	2%	4%	-%	-%	9%	4%	5%	2%
				m						m			
8	-	-	2	1	-	2	2	-	-	*	*	*	7
2%	-%	-%	6%	5%	-%	2%	4%	-%	-%	3%	3%	1%	2%
7	-	-	-	-	-	7	-	-	-	-	-	-	7
2%	-%	-%	-%	-%	-%	9%	-%	-%	-%	-%	-%	-%	2%
						jkm							
6	2	-	-	-	-	-	2	2	-	-	-	-	6
1%	7%	-%	-%	-%	-%	-%	4%	4%	-%	-%	-%	-%	2%
4	-	2	-	-	-	*	-	1	-	-	-	1	3
1%	-%	4%	-%	-%	-%	7%	-%	1%	-%	-%	-%	9%	1%
												fjm	

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Table 16 (continuation)

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Parcels to go

Priority Express

Tuffnells

One Post

Fastway Couriers

Haynes

First Post

ENC

AJG Parcels

Neo Post

MHI (Mail Handling International)

Yodel

Eagle Couriers

Lynx

Fast Track

Euro

UK / British Mail

Global Mailing

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
437	a	b	c	d	e	f	g	h	i	j	k	l	m
422	19	36	23	31	40	66	38	30	27	51	44	32	310
	26	55	31	28	35	80	47	51	25	18	16	9	378
4	2	-	-	-	-	-	-	-	1	-	1	-	3
1%	7%	-%	-%	-%	-%	-%	-%	-%	5%	-%	6%	-%	1%
											fm		
2	-	-	-	-	-	-	2	-	-	-	*	-	2
1%	-%	-%	-%	-%	-%	-%	4%	-%	-%	-%	3%	-%	1%
							m						
2	*	-	-	-	-	2	-	-	*	-	*	-	2
1%	1%	-%	-%	-%	-%	2%	-%	-%	1%	-%	1%	-%	1%
2	2	-	-	-	-	-	-	-	-	-	-	-	2
*%	7%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	*%
1	-	-	-	-	-	-	-	-	-	-	-	1	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	11%	-%
												befgikm	
1	-	*	-	-	-	-	-	-	-	-	*	-	*
*%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	*%
											m		
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%
										m			
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%
										m			
*	-	-	-	-	-	-	-	-	-	-	-	-	*
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	*%
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
*	-	-	-	-	-	-	-	-	-	-	-	-	*
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
*	-	-	-	-	-	-	-	-	-	*	-	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Business Post

Legal Post

Parcel Live

Other answers

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
437	*a 19	b 36	*c 23	d 31	e 40	f 66	g 38	h 30	*i 27	j 51	k 44	l 32	m 310
422	26	55	31	28	35	80	47	51	25	18	16	9	378
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
74	2	15	7	4	9	11	7	5	7	1	3	2	68
18%	7%	28%	23%	15%	27%	14%	16%	10%	27%	8%	18%	18%	18%
		j			j								

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Table 16 (continuation)

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	437	290	85	27	14	21	147	315	122	398	39	173	113	60	91
Weighted total	422	398	14	5	2	3	25	323	100	406	17	189	117	55	61
TNT	52	49	2	1	*	*	4	42	10	52	1	28	14	5	6
	12%	12%	15%	17%	19%	9%	15%	13%	11%	13%	3%	15%	12%	9%	10%
Parcellforce	42	41	1	-	*	*	1	37	5	40	2	27	8	3	4
	10%	10%	4%	-%	15%	3%	4%	11%	5%	10%	12%	14%	7%	6%	6%
		f						b				bd			
UPS	33	31	1	*	-	1	2	24	9	30	3	8	7	7	11
	8%	8%	6%	4%	-%	29%	8%	7%	9%	7%	a	4%	6%	13%	18%
														a	ab
UK Mail	30	28	*	*	*	*	1	25	5	29	*	7	9	6	7
	7%	7%	3%	7%	5%	4%	4%	8%	5%	7%	2%	4%	8%	10%	12%
															a
DHL	27	25	1	1	-	*	2	21	6	27	*	16	8	1	3
	6%	6%	7%	11%	-%	12%	8%	6%	6%	7%	2%	8%	7%	1%	4%
FedEx	26	23	2	*	*	*	2	19	6	25	*	13	5	4	4
	6%	6%	12%	4%	6%	8%	9%	6%	6%	6%	3%	7%	4%	7%	6%
APC	22	20	1	*	-	*	2	18	4	21	*	10	6	4	2
	5%	5%	6%	7%	-%	11%	7%	6%	4%	5%	2%	5%	5%	7%	3%
Interlink / Interlink Express / Direct	21	20	1	*	*	-	1	14	7	21	*	10	3	5	3
	5%	5%	6%	10%	6%	-%	6%	4%	7%	5%	1%	5%	2%	10%	4%
														b	
DX	17	15	1	1	*	*	2	14	3	15	2	4	10	1	2
	4%	4%	6%	18%	5%	7%	8%	4%	3%	4%	15%	2%	8%	2%	4%
							a				a				
Hermes	16	16	-	-	-	-	-	9	7	14	1	7	5	-	4
	4%	4%	-%	-%	-%	-%	-%	3%	7%	4%	8%	4%	4%	-%	6%
		f													
City Link Post	15	15	*	*	-	*	*	7	8	15	*	2	5	4	4
	4%	4%	1%	4%	-%	4%	2%	2%	8%	4%	1%	1%	4%	7%	7%
									a					a	a
Local Courier	9	9	-	-	*	*	*	8	1	9	*	5	4	*	*
	2%	2%	-%	-%	5%	3%	1%	2%	1%	2%	1%	2%	3%	*%	1%
Pitney Bowes	8	8	*	-	-	-	*	5	2	8	*	1	7	-	-
	2%	2%	1%	-%	-%	-%	*%	2%	2%	2%	1%	1%	6%	-%	-%
												ad			
Wey Group International	7	7	-	-	-	-	-	7	-	5	2	4	2	-	2
	2%	2%	-%	-%	-%	-%	-%	2%	-%	1%	11%	2%	2%	-%	3%
											a				
Freight - Better / Night	6	6	-	-	-	-	-	2	4	6	-	-	4	-	2
	1%	1%	-%	-%	-%	-%	-%	1%	4%	1%	-%	-%	3%	-	3%
									a				a		a
DPD	4	3	1	*	-	*	1	3	1	4	*	1	2	1	*
	1%	1%	8%	5%	-%	3%	6%	1%	1%	1%	1%	1%	2%	1%	*%
			a				a								
Parcels to go	4	4	-	-	-	-	-	2	2	4	-	3	*	*	-
	1%	1%	-%	-%	-%	-%	-%	1%	2%	1%	-%	2%	*%	1%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 16 (continuation)

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	437	290	85	27	14	21	147	315	122	398	39	173	113	60	91
Weighted total	422	398	14	5	2	3	25	323	100	406	17	189	117	55	61
Priority Express	2	2	*	-	-	-	*	2	-	2	-	*	2	-	-
	1%	1%	1%	-%	-%	-%	1%	1%	-%	1%	-%	*%	2%	-%	-%
Tuffnells	2	2	-	*	-	*	*	2	*	2	*	-	*	2	*
	1%	*%	-%	5%	-%	6%	2%	1%	*%	1%	1%	-%	*%	3%	*%
													a		
One Post	2	2	-	-	-	-	-	-	2	2	-	-	-	-	2
	*%	*%	-%	-%	-%	-%	-%	-%	2%	*%	-%	-%	-%	-%	3%
									a						a
Fastway Couriers	1	1	-	-	*	-	*	-	1	1	-	-	-	*	1
	*%	*%	-	-%	5%	-%	*%	-%	1%	*%	-%	-%	-%	1%	1%
Haynes	1	*	*	-	-	*	*	-	1	*	*	-	*	*	*
	*%	*%	2%	-%	-%	-%	1%	-%	1%	*%	2%	-%	-%	1%	1%
			a								a				
First Post	*	*	-	-	-	-	-	*	-	*	-	*	-	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	*%	-%	-%	-%
ENC	*	*	-	-	-	-	-	*	-	*	-	-	*	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	-%	*%	-%	-%
AJG Parcels	*	*	-	-	-	-	-	-	*	*	-	-	-	-	-
	*%	*%	-%	-%	-%	-%	-%	-%	*%	*%	-%	*%	-%	-%	-%
Neo Post	*	-	*	-	*	-	*	*	-	*	-	-	*	*	-
	*%	-%	1%	-%	6%	-%	1%	*%	-%	*%	-%	-%	*%	*%	-%
MHI (Mail Handling International)	*	-	*	-	-	-	*	*	*	*	-	*	-	-	*
	*%	-%	2%	-%	-%	-%	1%	*%	*%	*%	-%	*%	-%	-%	*%
			a												
Yodel	*	-	*	-	-	-	*	*	-	*	-	-	-	*	-
	*%	-%	1%	-%	-%	-%	1%	*%	-%	*%	-%	-%	-%	*%	-%
Eagle Couriers	*	-	*	-	-	-	*	*	-	-	*	-	-	*	-
	*%	-%	1%	-%	-%	-%	*%	*%	-%	-%	1%	-%	-%	*%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Legal Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Parcel Live

Other answers

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
437	290	85	27	14	21	147	315	122	398	39	173	113	60	91
422	398	14	5	2	3	25	323	100	406	17	189	117	55	61
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
74	71	2	*	1	-	3	59	15	72	3	42	17	11	5
18%	18%	17%	8%	28%	-%	14%	18%	15%	18%	15%	22%	14%	20%	8%
											d		d	

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Table 16 (continuation)

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	437	114	89	68	74	53	31	8	290	47	32	34	34	291	116	197	211
Weighted total	422	138	88	69	66	44	12	4	295	37	34	33	23	274	123	179	217
TNT	52	18	17	2	7	7	1	*	42	2	6	2	*	39	9	19	29
	12%	13%	19%	3%	11%	16%	7%	8%	14%	6%	16%	7%	2%	14%	7%	10%	14%
		c	c			c			e		e						
Parcellforce	42	23	8	6	1	3	*	-	38	-	-	2	1	30	7	23	14
	10%	17%	9%	9%	2%	6%	2%	-	13%	-	-	7%	6%	11%	6%	13%	7%
		df							bc							b	
UPS	33	10	7	4	4	6	2	-	21	*	4	7	*	22	11	19	14
	8%	8%	8%	5%	6%	13%	20%	-	7%	1%	11%	21%	1%	8%	9%	11%	6%
							acd					abe					
UK Mail	30	4	6	7	5	7	*	*	15	5	1	2	7	14	14	5	23
	7%	3%	6%	10%	7%	17%	4%	3%	5%	12%	4%	6%	30%	5%	12%	3%	11%
					a										a		a
DHL	27	15	2	7	3	*	-	-	19	5	3	*	-	19	8	12	15
	6%	11%	2%	10%	4%	1%	-	-	6%	14%	7%	*%	-	7%	6%	7%	7%
		be		be						de							
FedEx	26	7	7	5	5	*	*	1	19	1	2	2	2	16	9	11	14
	6%	5%	8%	7%	8%	*%	1%	32%	6%	2%	5%	6%	10%	6%	7%	6%	6%
APC	22	5	3	6	2	7	*	-	12	1	5	2	2	15	6	5	16
	5%	3%	3%	9%	2%	15%	2%	-	4%	3%	14%	7%	7%	5%	5%	3%	7%
						abd					a						a
Interlink / Interlink Express / Direct	21	4	5	4	6	2	*	-	12	4	2	1	2	14	5	11	9
	5%	3%	6%	6%	8%	4%	3%	-	4%	10%	5%	2%	9%	5%	4%	6%	4%
DX	17	*	1	6	5	2	3	*	14	2	*	1	*	10	5	10	5
	4%	*%	1%	9%	7%	4%	22%	5%	5%	6%	1%	2%	1%	4%	4%	6%	2%
				ab	a		abde										
Hermes	16	8	2	2	2	2	-	-	8	2	-	4	2	14	2	11	4
	4%	6%	2%	3%	3%	5%	-	-	3%	5%	-	11%	9%	5%	2%	6%	2%
												a				b	
City Link Post	15	4	2	1	4	3	1	*	7	-	2	4	2	8	7	7	8
	4%	3%	2%	2%	6%	6%	11%	5%	2%	-	7%	12%	9%	3%	6%	4%	4%
							b					ab	ab				
Local Courier	9	2	*	2	4	-	-	-	8	-	-	*	-	4	5	4	5
	2%	2%	1%	3%	6%	-	-	-	3%	-	-	1%	-	1%	4%	2%	2%
					b												
Pitney Bowes	8	-	1	-	4	1	2	-	5	1	-	2	-	1	2	1	2
	2%	-	1%	-	5%	3%	15%	-	2%	3%	-	5%	-	*%	1%	1%	1%
					a		abc										
Wey Group International	7	4	-	4	-	-	-	-	5	-	2	-	-	4	4	-	7
	2%	3%	-	5%	-	-	-	-	2%	-	5%	-	-	1%	3%	-	3%
				bd													a
Freight - Better / Night	6	2	2	2	-	-	-	-	4	-	-	2	-	2	4	2	4
	1%	1%	2%	3%	-	-	-	-	1%	-	-	6%	-	1%	3%	1%	2%
												a			a		

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 16 (continuation)

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	437	114	89	68	74	53	31	8	290	47	32	34	34	291	116	197	211
Weighted total	422	138	88	69	66	44	12	4	295	37	34	33	23	274	123	179	217
DPD	4	2	1	-	*	*	*	-	3	*	*	*	*	3	*	3	1
	1%	2%	1%	-%	*%	1%	3%	-%	1%	*%	1%	*%	1%	1%	*%	2%	1%
Parcels to go	4	4	-	-	*	-	-	-	4	-	-	-	-	4	*	4	*
	1%	3%	-%	-%	1%	-%	-%	-%	1%	-%	-%	-%	-%	1%	*%	2%	*%
Priority Express	2	-	2	-	*	-	-	-	1	2	-	-	-	1	2	1	2
	1%	-%	2%	-%	1%	-%	-%	-%	*%	5%	-%	-%	-%	*%	1%	*%	1%
Tuffnells	2	2	-	*	*	*	-	-	-	*	2	*	-	*	2	*	2
	1%	1%	-%	*%	*%	*%	-%	-%	-%	1%	5%	*%	-%	*%	2%	*%	1%
One Post	2	-	-	-	-	-	-	2	-	-	a	-	-	2	-	2	-
	*%	-%	-%	-%	-%	-%	-%	44%	-%	-%	5%	-%	-%	1%	-%	1%	-%
Fastway Couriers	1	-	-	-	1	-	*	-	-	-	*	-	1	1	-	1	-
	*%	-%	-%	-%	1%	-%	1%	-%	-%	-%	1%	-%	3%	*%	-%	1%	-%
Haynes	1	-	-	-	-	1	-	-	*	-	-	-	*	1	-	-	1
	*%	-%	-%	-%	-%	2%	-%	-%	*%	-%	-%	-%	1%	*%	-%	-%	*%
First Post	*	-	-	-	-	*	-	-	*	-	-	-	-	-	*	-	*
	*%	-%	-%	-%	-%	1%	-%	-%	*%	-%	-%	-%	-%	-%	*%	-%	*%
ENC	*	-	-	*	-	-	-	-	-	*	-	-	-	*	-	*	-
	*%	-%	-%	1%	-%	-%	-%	-%	-%	1%	-%	-%	-%	*%	-%	*%	-%
AJG Parcels	*	*	-	-	-	-	-	-	*	-	-	-	-	-	*	*	-
	*%	*%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	*%	*%	-%
Neo Post	*	-	-	-	*	*	-	-	*	-	-	-	-	*	-	*	-
	*%	-%	-%	-%	*%	*%	-%	-%	*%	-%	-%	-%	-%	*%	-%	*%	-%
MHI (Mail Handling International)	*	-	-	-	*	*	-	-	*	-	-	-	-	-	-	*	-
	*%	-%	-%	-%	*%	*%	-%	-%	*%	-%	-%	-%	-%	-%	-%	*%	-%
Yodel	*	-	-	-	-	*	-	-	*	-	-	-	-	*	-	*	-
	*%	-%	-%	-%	-%	*%	-%	-%	*%	-%	-%	-%	-%	*%	-%	*%	-%
Eagle Couriers	*	-	-	-	-	-	*	-	-	*	-	-	-	*	-	*	-
	*%	-%	-%	-%	-%	-%	1%	-%	-%	*%	-%	-%	-%	*%	-%	*%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	437	114	89	68	74	53	31	8	290	47	32	34	34	291	116	197	211
Weighted total	422	138	88	69	66	44	12	4	295	37	34	33	23	274	123	179	217
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Legal Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	74	23	23	10	14	2	1	*	55	11	4	1	2	49	19	27	41
	18%	17%	26%	15%	21%	5%	10%	3%	19%	30%	11%	4%	11%	18%	15%	15%	19%
		e	e	e	e	e	e		d	de							

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Table 16 (continuation)

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	437	171	95	165	409	310	416	358	172	350	310	414	151	334	319
Weighted total	422	171	86	161	390	273	399	339	140	338	288	396	119	308	312
TNT	52	27	10	15	46	29	48	37	8	38	34	47	14	43	33
	12%	16%	12%	9%	12%	10%	12%	11%	6%	11%	12%	12%	12%	14%	11%
Parcellforce	42	22	12	8	35	31	37	40	9	32	29	39	7	27	27
	10%	13%	13%	5%	9%	11%	9%	12%	7%	10%	10%	10%	6%	9%	9%
		c	c					e		e					
UPS	33	15	5	13	31	20	31	27	12	25	24	29	18	25	27
	8%	9%	6%	8%	8%	7%	8%	8%	8%	7%	8%	7%	15%	8%	9%
													ab		
UK Mail	30	9	8	11	29	18	29	24	9	26	24	29	7	22	23
	7%	6%	9%	7%	7%	7%	7%	7%	6%	8%	8%	7%	6%	7%	7%
DHL	27	12	6	9	21	15	21	20	9	16	17	21	15	17	15
	6%	7%	7%	6%	5%	6%	5%	6%	6%	5%	6%	5%	13%	6%	5%
													ab		
FedEx	26	10	4	12	23	18	25	22	9	18	19	25	10	22	18
	6%	6%	4%	7%	6%	7%	6%	6%	7%	5%	7%	6%	9%	7%	6%
APC	22	8	6	7	22	10	22	20	15	21	18	20	3	16	17
	5%	5%	7%	5%	6%	4%	5%	6%	11%	6%	6%	5%	3%	5%	6%
									abcd						
Interlink / Interlink Express / Direct	21	11	3	7	21	12	21	17	5	20	10	21	1	12	18
	5%	7%	3%	4%	5%	4%	5%	5%	3%	6%	3%	5%	1%	4%	6%
												c			
DX	17	*	3	14	17	17	17	9	8	17	11	17	2	13	14
	4%	*%	4%	9%	4%	6%	4%	3%	6%	5%	4%	4%	2%	4%	5%
			a	a		d									
Hermes	16	3	2	10	12	8	14	13	*	12	11	16	2	9	12
	4%	2%	3%	6%	3%	3%	3%	4%	*%	4%	4%	4%	2%	3%	4%
			a	e	e		e	e		e					
City Link Post	15	5	4	7	15	13	15	15	12	12	11	15	6	13	15
	4%	3%	5%	4%	4%	5%	4%	5%	9%	4%	4%	4%	5%	4%	5%
									acf						
Local Courier	9	5	1	4	7	6	7	8	3	8	8	7	3	7	6
	2%	3%	1%	2%	2%	2%	2%	2%	2%	2%	3%	2%	3%	2%	2%
Pitney Bowes	8	2	4	2	8	8	8	7	4	8	6	8	1	3	3
	2%	1%	5%	1%	2%	3%	2%	2%	3%	2%	2%	2%	1%	1%	1%
Wey Group International	7	4	-	4	7	5	7	5	2	5	4	7	2	7	4
	2%	2%	-%	2%	2%	2%	2%	2%	1%	2%	1%	2%	2%	2%	1%
Freight - Better / Night	6	2	2	2	6	6	6	4	-	6	6	6	2	6	6
	1%	1%	2%	1%	1%	2%	1%	1%	-%	2%	2%	1%	2%	2%	2%
DPD	4	3	*	1	4	2	4	2	1	4	1	4	2	2	4
	1%	2%	*%	*%	1%	1%	1%	1%	1%	1%	*%	1%	2%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 16 (continuation)

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?
Base: All Respondents who use 2 or more mail service providers

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail		
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services	
Significance Level: 95%															
Unweighted total	437	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	422	171	95	165	409	310	416	358	172	350	310	414	151	334	319
		171	86	161	390	273	399	339	140	338	288	396	119	308	312
Parcels to go	4	2	-	2	4	4	4	1	-	3	1	4	1	4	4
	1%	1%	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
Priority Express	2	*	-	2	2	2	2	2	*	2	1	2	1	2	2
	1%	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Tuffnells	2	2	-	*	2	2	2	2	*	*	2	2	*	2	2
	1%	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
One Post	2	-	-	2	2	2	2	2	-	2	-	2	-	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	-%	1%	-%	1%	-%	-%	1%
Fastway Couriers	1	*	-	1	1	1	1	1	1	1	1	1	1	1	1
	1%	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Haynes	1	-	-	1	1	1	1	*	*	*	*	1	-	1	1
	1%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%
First Post	*	-	*	-	*	*	*	-	-	*	-	*	-	*	-
	1%	-%	1%	-%	1%	1%	1%	-%	-%	1%	-%	1%	-%	1%	-%
ENC	*	-	-	*	*	*	*	*	*	*	*	*	-	*	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%
AJG Parcels	*	-	-	*	-	*	*	-	-	*	*	*	-	*	-
	1%	-%	-%	1%	-%	1%	1%	-%	-%	1%	1%	1%	-%	1%	-%
Neo Post	*	-	*	*	*	*	*	-	*	*	*	*	*	*	*
	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
MHI (Mail Handling International)	*	-	-	*	*	*	*	-	*	*	*	*	*	*	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Yodel	*	-	-	*	*	*	*	-	*	*	*	*	-	*	*
	1%	-%	-%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	1%	1%
Eagle Couriers	*	-	*	-	*	*	*	*	*	*	*	*	-	*	*
	1%	-%	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Legal Post

Parcel Live

Other answers

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
437	a 171	b 95	c 165	a 409	b 310	c 416	d 358	e 172	f 350	a 310	b 414	c 151	a 334	b 319
422	171	86	161	390	273	399	339	140	338	288	396	119	308	312
Legal Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other answers	74	29	16	26	72	44	59	32	59	48	71	20	54	57
	18%	17%	19%	16%	19%	16%	18%	17%	23%	17%	18%	17%	18%	18%

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Table 16 (continuation)

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	437	77	12	318	431	394	432	381	436	-	309	432	179	73	50	312
Weighted total	422	74	11	309	413	372	415	360	422	-	278	417	146	69	49	303
TNT	52	11	1	37	52	47	52	45	52	-	37	52	15	5	7	40
	12%	15%	13%	12%	13%	13%	13%	13%	12%	-%	13%	13%	10%	7%	15%	13%
Parcellforce	42	4	-	31	38	40	40	40	42	-	32	42	12	8	6	27
	10%	6%	-	10%	9%	11%	10%	11%	10%	-%	12%	10%	8%	12%	12%	9%
UPS	33	7	3	23	31	27	31	27	33	-	22	33	19	10	3	21
	8%	9%	28%	7%	8%	7%	8%	8%	8%	-%	8%	8%	13%	14%	5%	7%
UK Mail	30	7	*	21	30	28	30	25	30	-	18	30	9	16	*	13
	7%	9%	4%	7%	7%	7%	7%	7%	7%	-%	7%	7%	6%	24%	1%	4%
DHL	27	2	-	22	25	19	25	18	27	-	17	25	15	*	4	22
	6%	3%	-%	7%	6%	5%	6%	5%	6%	-%	6%	6%	10%	*%	8%	7%
FedEx	26	3	-	22	26	21	26	22	26	-	20	26	9	2	6	18
	6%	4%	-%	7%	6%	6%	6%	6%	6%	-%	7%	6%	6%	3%	12%	6%
APC	22	3	2	16	22	20	22	21	22	-	11	22	4	2	4	16
	5%	4%	19%	5%	5%	5%	5%	6%	5%	-%	4%	5%	3%	3%	7%	5%
Interlink / Interlink Express / Direct	21	3	-	16	21	18	21	13	21	-	10	21	7	4	2	15
	5%	5%	-%	5%	5%	5%	5%	4%	5%	-%	4%	5%	5%	5%	4%	5%
DX	17	4	2	9	17	17	17	13	17	-	9	17	2	2	2	13
	4%	5%	20%	3%	4%	5%	4%	4%	4%	-%	3%	4%	1%	3%	4%	4%
Hermes	16	4	-	12	16	16	16	16	16	-	15	16	4	4	-	12
	4%	5%	-%	4%	4%	4%	4%	4%	4%	-%	6%	4%	3%	6%	-%	4%
City Link Post	15	1	1	14	15	15	15	14	15	-	7	15	6	2	1	12
	4%	2%	12%	5%	4%	4%	4%	4%	4%	-%	2%	4%	4%	3%	2%	4%
Local Courier	9	1	-	7	9	8	9	7	9	-	6	9	2	2	2	4
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	1%	3%	5%	1%
Pitney Bowes	8	-	-	3	8	8	8	5	8	-	4	8	3	*	-	7
	2%	-%	-%	1%	2%	2%	2%	2%	2%	-%	1%	2%	2%	1%	-%	2%
Wey Group International	7	2	-	5	7	5	7	7	7	-	5	7	4	2	-	5
	2%	2%	-%	2%	2%	1%	2%	2%	2%	-%	2%	2%	2%	3%	-%	2%
Freight - Better / Night	6	-	-	6	6	4	6	6	6	-	6	6	2	-	2	4
	1%	-%	-%	2%	1%	1%	1%	2%	1%	-%	2%	1%	1%	-%	4%	1%
DPD	4	1	-	3	4	2	4	4	4	-	2	4	2	*	-	4
	1%	1%	-%	1%	1%	*%	1%	1%	1%	-%	1%	1%	1%	1%	-%	1%
Parcels to go	4	1	-	3	4	4	4	2	4	-	2	4	1	*	-	4
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	1%
Priority Express	2	*	-	2	2	2	2	2	2	-	*	2	1	*	-	2
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	*%	1%	*%	1%	-%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Table 16 (continuation)

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?**Base: All Respondents who use 2 or more mail service providers**

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	437	77	12	318	431	394	432	381	436	-	309	432	179	73	50	312
Weighted total	422	74	11	309	413	372	415	360	422	-	278	417	146	69	49	303
Tuffnells	2	-	-	2	2	2	2	2	2	-	2	2	2	-	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
One Post	2	-	-	2	2	2	2	2	2	-	-	-	-	2	-	-
	*%	-%	-%	1%	*%	*%	*%	*%	*%	-%	-%	-%	-%	3%	-%	-%
Fastway Couriers	1	-	-	1	1	1	1	1	1	-	1	1	1	1	-	*
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	1%	-%	*%
Haynes	1	*	-	*	1	1	1	1	1	-	1	1	-	-	*	*
	*%	1%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	-%	-%	1%	*%
First Post	*	*	-	-	*	*	*	-	*	-	*	*	*	-	*	-
	*%	1%	-%	-%	*%	*%	*%	-	*%	-%	*%	*%	*%	-%	1%	-%
ENC	*	-	-	*	*	-	*	*	*	-	*	*	-	-	-	*
	*%	-%	-%	*%	*%	-%	*%	*%	*%	-%	*%	*%	-%	-%	-%	*%
AJG Parcels	*	-	-	*	*	*	*	*	*	-	*	*	*	-	-	*
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	-%	-%	*%
Neo Post	*	-	-	*	*	*	*	*	*	-	*	*	*	-	-	*
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	-%	-%	*%
MHI (Mail Handling International)	*	-	-	*	*	*	*	*	*	-	*	*	*	-	*	*
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	-%	*%	*%
Yodel	*	-	-	*	*	*	*	*	*	-	-	*	-	-	-	*
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	-%	*%	-%	-%	-%	*%
Eagle Couriers	*	-	*	-	*	*	*	*	*	-	-	*	-	-	*	-
	*%	-%	1%	-%	*%	*%	*%	*%	*%	-%	-%	*%	-%	-%	*%	-%
Lynx	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Legal Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Other answers

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
437	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
422	77	12	318	431	394	432	381	436	-	309	432	179	73	50	312
	74	11	309	413	372	415	360	422	-	278	417	146	69	49	303
74	17	*	50	73	63	73	64	74	-	49	73	28	6	10	58
18%	24%	3%	16%	18%	17%	18%	18%	18%	-%	18%	17%	19%	9%	20%	19% a

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 16 (continuation)

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?
Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	437	126	43	259	317	120	430	7	262	34	138	264	385	10
Weighted total	422	139	42	237	307	115	415	8	252	31	135	255	374	8
TNT	52	14	4	34	40	12	50	2	30	*	11	37	40	*
	12%	10%	10%	14%	13%	10%	12%	24%	12%	1%	8%	15%	11%	1%
												a		
Parcellforce	42	15	4	23	32	10	42	-	24	6	9	26	36	2
	10%	11%	9%	10%	10%	8%	10%	-%	9%	19%	7%	10%	10%	22%
UPS	33	11	2	20	25	8	33	-	24	1	13	20	30	*
	8%	8%	4%	8%	8%	7%	8%	-%	10%	2%	10%	8%	8%	6%
UK Mail	30	13	5	12	23	6	30	-	19	-	12	15	27	-
	7%	9%	12%	5%	8%	5%	7%	-%	7%	-%	9%	6%	7%	-%
DHL	27	9	2	17	21	6	27	*	19	2	7	17	23	1
	6%	6%	4%	7%	7%	6%	7%	1%	8%	6%	5%	7%	6%	16%
FedEx	26	6	6	13	16	9	26	-	18	5	13	12	25	-
	6%	5%	14%	6%	5%	8%	6%	-%	7%	16%	9%	5%	7%	-%
			a											
APC	22	9	2	10	16	6	22	-	11	2	8	13	22	-
	5%	7%	5%	4%	5%	5%	5%	-%	4%	6%	6%	5%	6%	-%
Interlink / Interlink Express / Direct	21	9	*	12	15	6	21	-	13	1	4	16	19	-
	5%	6%	1%	5%	5%	6%	5%	-%	5%	5%	3%	6%	5%	-%
DX	17	2	*	14	12	5	16	1	6	1	6	9	16	1
	4%	2%	*%	6%	4%	4%	4%	17%	2%	4%	4%	3%	4%	16%
Hermes	16	6	6	4	5	10	16	-	11	2	8	8	14	-
	4%	4%	13%	2%	2%	9%	4%	-%	5%	6%	6%	3%	4%	-%
			ac			a								
City Link Post	15	6	1	8	12	3	15	-	10	-	7	9	10	2
	4%	4%	3%	4%	4%	3%	4%	-%	4%	-%	5%	3%	3%	30%
Local Courier	9	4	-	5	7	2	9	-	2	2	3	6	8	-
	2%	3%	-%	2%	2%	2%	2%	-%	1%	7%	2%	2%	2%	-%
										a				
Pitney Bowes	8	*	-	7	6	2	8	-	3	-	-	3	7	-
	2%	*%	-%	3%	2%	2%	2%	-%	1%	-%	-%	1%	2%	-%
Wey Group International	7	2	-	5	7	-	7	-	5	-	4	4	7	-
	2%	1%	-%	2%	2%	-%	2%	-%	2%	-%	3%	1%	2%	-%
Freight - Better / Night	6	2	4	-	4	2	6	-	2	-	-	6	4	-
	1%	2%	8%	-%	1%	2%	1%	-%	1%	-%	-%	2%	1%	-%
		c	ac											
DPD	4	1	*	3	3	1	4	-	3	*	*	4	4	-
	1%	1%	*%	1%	1%	1%	1%	-%	1%	1%	*%	1%	1%	-%
Parcels to go	4	1	-	3	4	*	4	-	3	-	1	3	4	-
	1%	1%	-%	1%	1%	*%	1%	-%	1%	-%	1%	1%	1%	-%
Priority Express	2	*	-	2	*	2	2	-	*	2	1	2	2	-
	1%	*%	-%	1%	*%	2%	1%	-%	*%	6%	*%	1%	1%	-%

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	437	126	43	259	317	120	430	7	262	34	138	264	385	10
Weighted total	422	139	42	237	307	115	415	8	252	31	135	255	374	8
Tuffnells	2	2	-	*	2	-	2	-	*	-	-	2	2	-
	1%	1%	-%	*%	1%	-%	1%	-%	*%	-%	-%	1%	1%	-%
One Post	2	2	-	-	-	2	2	-	2	-	-	2	2	-
	*%	1%	-%	-%	-%	2%	*%	-%	1%	-%	-%	1%	*%	-%
					a									
Fastway Couriers	1	1	-	*	1	-	1	-	-	-	1	*	1	-
	*%	*%	-%	*%	*%	-%	*%	-%	-%	-%	*%	*%	*%	-%
Haynes	1	-	*	*	1	-	1	-	*	*	1	-	*	-
	*%	-%	1%	*%	*%	-%	*%	-%	*%	2%	1%	-%	*%	-%
First Post	*	*	-	-	-	*	*	-	-	*	-	*	*	-
	*%	*%	-%	-%	-%	*%	*%	-%	-	2%	-%	*%	*%	-%
							a							
ENC	*	-	*	-	*	-	*	-	-	-	-	*	-	*
	*%	-%	1%	-%	*%	-%	*%	-%	-%	-%	-%	*%	-%	6%
AJG Parcels	*	*	-	-	*	-	*	-	-	-	*	-	*	-
	*%	*%	-%	-%	*%	-%	*%	-%	-%	-%	*%	-%	*%	-%
Neo Post	*	*	-	*	*	-	*	-	*	-	-	*	*	-
	*%	*%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%	*%	-%
MHI (Mail Handling International)	*	-	-	*	*	-	*	-	*	-	-	*	*	-
	*%	-%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%	*%	-%
Yodel	*	-	*	-	*	-	*	-	*	-	*	-	*	-
	*%	-%	*%	-%	*%	-%	*%	-%	*%	-%	*%	-%	-%	2%
Eagle Couriers	*	-	-	*	*	-	*	-	*	-	-	*	*	-
	*%	-%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%	*%	-%
Lynx	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fast Track	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Euro	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Global Mailing	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Business Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Legal Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Parcel Live	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?

Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Other answers

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	*b	a	b	a	b	a	*b
437	126	43	259	317	120	430	7	262	34	138	264	385	10
422	139	42	237	307	115	415	8	252	31	135	255	374	8
74	24	6	42	53	21	70	4	45	6	28	40	68	-
18%	17%	15%	18%	17%	19%	17%	58%	18%	18%	21%	16%	18%	-%

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?
Base: All Respondents who use 2 or more mail service providers

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	437	129	126	102	80
Weighted total	422	115	119	97	92
TNT	52	16	16	9	11
	12%	14%	13%	10%	12%
Parcellforce	42	13	6	11	12
	10%	11%	5%	12%	13%
					b
UPS	33	10	7	11	4
	8%	9%	6%	12%	5%
UK Mail	30	4	8	5	13
	7%	3%	7%	5%	14%
					ac
DHL	27	4	7	6	9
	6%	4%	6%	6%	10%
FedEx	26	3	13	5	5
	6%	3%	11%	5%	6%
			a		
APC	22	4	10	5	2
	5%	3%	9%	6%	2%
Interlink / Interlink Express / Direct	21	8	3	6	4
	5%	7%	3%	6%	4%
DX	17	14	1	2	*
	4%	12%	1%	2%	*%
		bcd			
Hermes	16	5	2	2	7
	4%	4%	2%	2%	7%
					b
City Link Post	15	7	5	1	3
	4%	6%	4%	1%	3%
		c			
Local Courier	9	2	5	2	-
	2%	2%	4%	2%	-%
Pitney Bowes	8	1	3	4	-
	2%	1%	2%	4%	-%
Wey Group International	7	2	2	2	2
	2%	2%	2%	2%	2%
Freight - Better / Night	6	-	-	4	2
	1%	-%	-%	4%	2%
			ab		
DPD	4	*	1	1	3
	1%	*%	*%	1%	3%
Parcels to go	4	2	-	-	2
	1%	2%	-%	-%	2%
Priority Express	2	2	-	-	*
	1%	2%	-%	-%	1%

Columns Tested: a,b,c,d

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Table 16 (continuation)

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QV5c. Which mail service provider would you consider as your organisation's main provider (in addition to, or other than, Royal Mail)?
Base: All Respondents who use 2 or more mail service providers

Significance Level: 95%

Unweighted total

Weighted total

Tuffnells

One Post

Fastway Couriers

Haynes

First Post

ENC

AJG Parcels

Neo Post

 MHI (Mail Handling
International)

Yodel

Eagle Couriers

Lynx

Fast Track

Euro

UK / British Mail

Global Mailing

Business Post

Legal Post

Parcel Live

Other answers

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
437	129	126	102	80
422	115	119	97	92
2	*	2	*	-
1%	*%	2%	*%	-%
2	2	-	-	-
*%	2%	-%	-%	-%
1	-	-	1	*
*%	-%	-%	1%	1%
1	1	-	-	-
*%	1%	-%	-%	-%
*	-	*	-	-
*%	-%	*%	-%	-%
*	*	-	-	-
*%	*%	-%	-%	-%
*	-	-	-	*
*%	-%	-%	-%	1%
*	*	-	-	-
*%	*%	-%	-%	-%
MHI (Mail Handling International)	*	*	-	-
*%	*%	*%	-%	-%
Yodel	*	*	-	-
*%	-%	*%	-%	-%
Eagle Couriers	*	-	-	-
*%	*%	-%	-%	-%
Lynx	-	-	-	-
-%	-%	-%	-%	-%
Fast Track	-	-	-	-
-%	-%	-%	-%	-%
Euro	-	-	-	-
-%	-%	-%	-%	-%
UK / British Mail	-	-	-	-
-%	-%	-%	-%	-%
Global Mailing	-	-	-	-
-%	-%	-%	-%	-%
Business Post	-	-	-	-
-%	-%	-%	-%	-%
Legal Post	-	-	-	-
-%	-%	-%	-%	-%
Parcel Live	-	-	-	-
-%	-%	-%	-%	-%
Other answers	74	14	28	20
18%	12%	24%	21%	13%
		a		

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Table 17
QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
Weighted total	1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
Letters	1478	88	159	103	106	109	255	176	194	84	78	67	60	1273
	92%	92%	90%	92%	91%	94%	92%	93%	93%	95%	89%	90%	96%	92%
													jk	
Other everyday correspondence, such as invoices, one off bills etc.	1262	70	134	88	86	87	220	154	180	74	68	55	47	1093
	79%	73%	76%	79%	74%	75%	79%	81%	86%	84%	78%	73%	74%	79%
									abdekl					
Large letters	904	59	107	72	65	54	173	107	103	52	47	33	32	792
	56%	62%	61%	64%	56%	47%	62%	57%	50%	59%	55%	44%	50%	57%
		ek	ek	ehkl	k		ehkl	k		k	k			ek
Parcels and packets	730	34	86	61	49	42	134	94	94	46	42	26	22	640
	45%	35%	49%	55%	42%	36%	48%	50%	45%	52%	49%	35%	35%	46%
			kl	aekl			ekl	ekl		aekl	ekl			ekl
Bulk customer mailings, such as bills, statements, customer packs etc.	268	12	31	16	23	17	48	24	43	17	15	11	12	230
	17%	12%	17%	14%	19%	15%	17%	13%	21%	20%	17%	15%	19%	17%
Advertising and promotional material, such as catalogues, brochures and direct mail	161	8	19	8	14	10	26	22	25	10	9	7	4	141
	10%	8%	11%	7%	12%	9%	9%	12%	12%	11%	11%	9%	7%	10%
Publications, such as magazines, periodicals, customer newsletters	52	*	2	9	2	3	15	4	7	1	4	2	3	44
	3%	1%	1%	8%	2%	2%	5%	2%	3%	2%	5%	2%	4%	3%
				abdgikm										
Goods / business supplies / large packets ordered via lorry	4	-	-	-	-	1	2	-	-	-	*	-	-	3
	1%	0%	0%	0%	0%	1%	1%	0%	0%	0%	1%	0%	0%	1%
Legal / accounts documents / tax forms	2	-	-	-	-	-	-	2	-	-	*	*	-	2
	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	1%	0%	1%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
None of These	44	2	2	4	6	*	13	2	4	1	3	5	1	34
	3%	2%	1%	3%	6%	1%	5%	1%	2%	1%	4%	6%	2%	2%
					eg		e				e	begm		
Other	4	-	*	*	3	-	*	-	-	-	*	-	*	3
	1%	0%	1%	1%	2%	0%	1%	0%	0%	0%	1%	0%	1%	1%
					fk m									
Don't Know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
NET: (Large) Letters,
Packets and parcels

NET: Bulk mailings
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1536	92	170	108	110	113	260	185	202	85	82	68	61	1325
96%	96%	96%	97%	94%	98%	94%	98%	97%	97%	94%	91%	97%	96%
					k		k	k				k	k
382	16	42	27	29	22	70	42	56	24	22	16	15	329
24%	17%	24%	24%	25%	19%	25%	23%	27%	27%	25%	21%	24%	24%

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Table 17 (continuation)

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
Weighted total	1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
Letters	1478	1417	36	9	7	8	61	1048	430	1421	56	1006	280	102	88
	92%	92%	93%	98%	100%	95%	a	92%	93%	92%	94%	90%	96%	97%	93%
Other everyday correspondence, such as invoices, one off bills etc.	1262	1210	32	9	5	6	53	892	371	1221	41	831	260	93	79
	79%	79%	83%	91%	77%	70%	82%	78%	80%	79%	69%	75%	89%	88%	83%
			e	ae			e			b			ad	a	a
Large letters	904	853	29	9	7	7	52	651	253	866	38	526	225	76	77
	56%	55%	74%	93%	94%	83%	80%	57%	55%	56%	65%	47%	77%	73%	81%
			a	abf	abf	a	a						a	a	a
Parcels and packets	730	689	23	7	4	6	40	536	193	695	34	369	183	92	85
	45%	45%	59%	76%	60%	70%	63%	47%	42%	45%	58%	33%	63%	88%	89%
			a	ab	a	a	a	b			a		a	ab	ab
Bulk customer mailings, such as bills, statements, customer packs etc.	268	245	13	5	3	2	22	178	89	257	11	114	81	39	33
	17%	16%	32%	54%	36%	26%	35%	16%	19%	17%	18%	10%	28%	37%	35%
			a	abef	a	a	a						a	a	a
Advertising and promotional material, such as catalogues, brochures and direct mail	161	149	6	2	2	2	12	107	55	150	11	64	54	23	20
	10%	10%	16%	25%	32%	18%	19%	9%	12%	10%	19%	6%	19%	22%	21%
			a	a	abf	a	a				a		a	a	a
Publications, such as magazines, periodicals, customer newsletters	52	48	2	1	1	*	5	43	9	45	7	17	16	7	13
	3%	3%	6%	14%	9%	4%	7%	4%	2%	3%	12%	2%	5%	7%	13%
			a	a	a		a				a		a	a	ab
Goods / business supplies / large packets ordered via lorry	4	4	-	-	*	-	*	2	1	4	-	2	1	-	*
	1%	1%	0%	0%	2%	0%	1%	1%	1%	1%	0%	1%	1%	0%	1%
					ab										
Legal / accounts documents / tax forms	2	2	*	*	-	-	*	2	*	*	2	-	2	-	*
	1%	1%	1%	1%	0%	0%	1%	1%	1%	1%	3%	0%	1%	0%	1%
											a		a		
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
None of These	44	43	1	-	-	*	1	31	13	43	1	44	-	-	-
	3%	3%	2%	0%	0%	4%	1%	3%	3%	3%	1%	4%	0%	0%	0%
												bcd			
Other	4	3	-	-	1	-	1	3	*	3	*	2	1	1	-
	1%	1%	0%	0%	10%	0%	1%	1%	1%	1%	1%	1%	1%	1%	0%
					abcef		a							a	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Don't Know

NET: (Large) Letters,

Packets and parcels

NET: Bulk mailings

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1536	1474	37	10	7	8	62	1094	442	1478	58	1048	288	105	95
96%	96%	96%	100%	100%	96%	97%	96%	95%	96%	98%	94%	99%	100%	100%
												a	a	a
382	352	17	6	4	3	30	262	120	361	21	178	111	50	43
24%	23%	44%	61%	50%	37%	47%	23%	26%	23%	36%	16%	38%	48%	45%
		a	abef	a	a	a				a		a	a	a

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Table 17 (continuation)

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Letters	1478	614	306	232	212	76	28	10	1303	70	38	41	27	258	113	168	203
	92%	85%	98% a	97% a	97% a	97% a	98% a	100%	92%	93%	87%	95%	91%	95%	92%	94%	94%
Other everyday correspondence, such as invoices, one off bills etc.	1262	471	271	217	198	71	27	8	1103	67	31	38	23	226	92	144	175
	79%	65%	87% a	91% a	91% a	90% a	95% a	82%	78%	89% ac	71%	89% c	79%	83%	75%	80%	81%
Large letters	904	278	200	163	166	64	26	8	762	56	31	33	23	180	79	128	131
	56%	39%	64% a	68% a	76% ab	81% abc	90% abcd	82%	54%	74% a	73% a	76% a	78% a	66%	64% a	71% b	61% a
Parcels and packets	730	242	153	125	132	53	17	8	552	68	43	41	26	209	110	131	188
	45%	34%	49% a	52% a	61% ab	67% abc	60% a	82%	39%	91% a	100% abe	95% a	88% a	76%	89% a	73% a	87% a
Bulk customer mailings, such as bills, statements, customer packs etc.	268	39	48	52	74	38	14	2	202	20	14	18	13	84	30	52	61
	17%	5%	15% a	22% a	34% abc	49% abcd	50% abcd	25%	14%	26% a	33% a	42% ab	44% ab	31%	25% a	29% a	28% a
Advertising and promotional material, such as catalogues, brochures and direct mail	161	25	24	40	42	18	9	2	124	7	10	11	9	38	19	29	28
	10%	4%	8% a	17% ab	19% ab	23% ab	33% abcd	22%	9%	9%	23% ab	25% ab	30% ab	14%	16% a	16% a	13% a
Publications, such as magazines, periodicals, customer newsletters	52	13	11	6	6	8	5	4	39	7	5	*	2	12	7	9	9
	3%	2%	3%	2%	3%	10% abcd	19% abcd	37%	3%	9% a	11% ad	1%	5%	4%	5%	5% a	4% a
Goods / business supplies / large packets ordered via lorry	4	-	2	-	*	2	-	-	2	*	-	*	1	2	2	-	4
	*%	-%	1%	-%	*% acd	2% acd	-%	-%	*%	*%	-%	1%	4% a	1%	1%	-%	2% a
Legal / accounts documents / tax forms	2	-	-	-	2	-	-	*	*	2	-	-	-	2	-	2	-
	*%	-%	-%	-%	1% a	-%	-%	1%	*%	2% a	-%	-%	-%	1%	-%	1% a	-%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of These	44	44	-	-	-	-	-	-	44	-	-	-	-	*	-	*	-
	3%	6% bcdef	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%	-%	*%	-%	*% a	-%
Other	4	2	-	2	*	-	-	-	4	*	-	-	-	2	-	2	-
	*%	*%	-%	1%	*%	-%	-%	-%	*%	*%	-%	-%	-%	1%	-%	1% a	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%	a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	1413	75	43	43	30	274	123	179	217
Don't Know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: (Large) Letters, Packets and parcels	1536	659	310	237	213	78	29	1347	73	43	43	30	271	123	179	215
	96%	92%	99%	99%	98%	100%	100%	95%	97%	100%	100%	100%	99%	100%	100%	99%
		a	a	a	a	a	a									
NET: Bulk mailings	382	71	71	86	91	43	17	298	28	19	21	16	98	41	61	78
	24%	10%	23%	36%	42%	55%	59%	21%	38%	44%	49%	53%	36%	33%	34%	36%
		a	a	ab	ab	abcd	abcd		a	a	a	a				

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?
Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Weighted total	1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
Letters	1478	722	272	475	1478	878	1478	685	371	1222	634	1445	228	1168	1060
	92%	89%	96%	95%	100%	97%	98%	94%	98%	96%	95%	98%	98%	98%	99%
		a	a	a	bcd	d	d	d	d	d	a	a	a	a	a
Other everyday correspondence, such as invoices, one off bills etc.	1262	594	234	429	1218	774	1228	600	341	1262	542	1212	188	995	898
	79%	73%	83%	86%	82%	86%	82%	82%	90%	100%	81%	82%	80%	83%	83%
		a	a	a	ac	ac	ac	ac	abcd	abcde					
Large letters	904	360	194	347	878	904	904	518	275	776	473	886	183	780	689
	56%	44%	69%	70%	59%	100%	60%	71%	72%	61%	71%	60%	78%	65%	64%
		a	a	a	acdef	a	ac	ac	ac		b		ab		
Parcels and packets	730	293	143	289	685	518	697	730	228	602	527	689	191	570	526
	45%	36%	51%	58%	46%	57%	46%	100%	60%	47%	79%	47%	82%	48%	49%
		a	a	ab	ac	ac	ac	abc	ac		b		b		
Bulk customer mailings, such as bills, statements, customer packs etc.	268	87	64	115	261	192	263	169	266	249	139	262	63	218	224
	17%	11%	23%	23%	18%	21%	18%	23%	70%	20%	21%	18%	27%	18%	21%
		a	a	a	ac	ac	ac	ac	abcd				ab		
Advertising and promotional material, such as catalogues, brochures and direct mail	161	46	33	82	161	126	161	97	161	146	73	157	41	137	130
	10%	6%	12%	16%	11%	14%	11%	13%	42%	11%	11%	11%	18%	12%	12%
		a	a	a	ac	ac	ac	ac	abcd				ab		
Publications, such as magazines, periodicals, customer newsletters	52	11	14	28	50	40	52	33	52	44	25	46	15	39	38
	3%	1%	5%	6%	3%	4%	3%	5%	14%	3%	4%	3%	7%	3%	4%
		a	a	a					abcd				b		
Goods / business supplies / large packets ordered via lorry	4	-	3	1	4	2	4	2	2	4	2	4	*	4	4
	*%	-%	1%	*%	*%	*%	*%	*%	1%	*%	*%	*%	*%	*%	*%
		a	a												
Legal / accounts documents / tax forms	2	-	-	2	2	2	2	2	*	2	2	2	*	2	2
	*%	-%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of These	44	39	2	*	2	-	2	-	-	4	-	2	-	2	-
	3%	5%	1%	*%	*%	-%	*%	-%	-%	*%	-%	*%	-%	*%	-%
		bc													
Other	4	1	*	3	3	2	3	3	*	4	3	3	2	3	1
	*%	*%	*%	1%	*%	*%	*%	*%	*%	*%	*%	*%	1%	*%	*%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Don't Know

NET: (Large) Letters,

Packets and parcels

NET: Bulk mailings

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: (Large) Letters, Packets and parcels														
1536	750	278	497	1478	904	1503	730	377	1242	669	1480	234	1193	1076
96%	93%	99%	100%	100%	100%	100%	100%	99%	98%	100%	100%	100%	100%	100%
		a	ab	ef	ef	ef	ef							
NET: Bulk mailings														
382	124	87	168	373	277	377	230	380	343	191	369	83	305	308
24%	15%	31%	34%	25%	31%	25%	31%	100%	27%	28%	25%	35%	26%	29%
		a	a		ac	acf	abcd					ab		

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QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?
Base: All respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Letters	1478	251	36	1181	1453	1258	1456	1130	1471	-	843	1453	336	129	227	1120
	92%	96%	100%	92%	93%	94%	93%	94%	92%	-%	94%	93%	94%	88%	95%	92%
		c													a	
Other everyday correspondence, such as invoices, one off bills etc.	1262	222	29	999	1232	1099	1237	969	1259	2	728	1236	279	124	196	940
	79%	85%	82%	78%	79%	82%	79%	81%	79%	100%	81%	79%	78%	85%	82%	77%
		c												c		
Large letters	904	171	24	706	898	846	899	734	904	-	563	893	230	90	140	673
	56%	66%	65%	55%	58%	63%	57%	61%	57%	-%	63%	57%	64%	62%	58%	55%
		c				ace		ce			b		b			
Parcels and packets	730	131	21	560	716	669	721	654	728	-	494	724	227	96	103	529
	45%	50%	58%	44%	46%	50%	46%	54%	46%	-%	55%	46%	64%	66%	43%	44%
		c				ace		abce			b		ab	bc		
Bulk customer mailings, such as bills, statements, customer packs etc.	268	53	10	206	260	240	260	232	268	-	167	264	77	29	41	197
	17%	20%	28%	16%	17%	18%	17%	19%	17%	-%	19%	17%		20%	17%	16%
													b			
Advertising and promotional material, such as catalogues, brochures and direct mail	161	30	5	122	159	151	160	136	161	-	89	160	45	28	12	119
	10%	12%	14%	9%	10%	11%	10%	11%	10%	-%	10%	10%	13%	19%	5%	10%
														bc		b
Publications, such as magazines, periodicals, customer newsletters	52	15	5	35	52	45	52	43	52	-	30	52	18	9	7	37
	3%	6%	14%	3%	3%	3%	3%	4%	3%	-%	3%	3%	5%	6%	3%	3%
		c	c											c		
Goods / business supplies / large packets ordered via lorry	4	-	-	4	4	2	4	4	4	-	4	4	*	2	-	2
	1%	-%	-%	100%	100%	50%	100%	100%	100%	-%	100%	100%	100%	50%	-%	100%
														c		
Legal / accounts documents / tax forms	2	2	-	*	2	2	2	2	2	-	2	2	*	*	*	2
	1%	100%	-%	50%	100%	100%	100%	100%	100%	-%	100%	100%	100%	100%	100%	100%
		c														
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of These	44	1	*	40	42	24	42	14	43	-	10	40	5	*	3	41
	3%	1%	100%	3%	3%	2%	3%	1%	3%	-%	1%	3%	2%	1%	1%	3%
				a	d		d		d			a				a

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Other

Don't Know

NET: (Large) Letters,

Packets and parcels

NET: Bulk mailings

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
4	-	-	4	4	3	4	2	4	-	2	4	2	1	-	2
4%	-%	-%	4%	4%	3%	4%	2%	4%	-%	4%	4%	1%	1%	-%	4%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
4%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1536	257	36	1225	1503	1310	1510	1174	1528	-	879	1511	350	145	229	1158
96%	99%	100%	95%	96%	97%	96%	98%	96%	-%	98%	96%	98%	100%	96%	95%
	c				e		ace			b			bc		
382	72	15	295	374	343	375	324	382	-	231	378	105	39	52	289
24%	28%	42%	23%	24%	26%	24%	27%	24%	-%	26%	24%	29%	27%	22%	24%
		c										b			

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Table 17 (continuation)

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?
Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Letters	1478	188	92	1186	1016	462	1383	95	959	115	364	1091	346	7
	92%	91%	89%	93%	93%	91%	92%	89%	92%	94%	92%	93%	92%	84%
Other everyday correspondence, such as invoices, one off bills etc.	1262	161	80	1012	880	383	1192	71	822	94	321	918	297	7
	79%	78%	77%	79%	80%	75%	80%	66%	79%	77%	81%	78%	79%	84%
Large letters	904	114	63	722	661	243	876	28	580	73	243	647	236	6
	56%	56%	60%	56%	60%	48%	59%	27%	56%	60%	61%	55%	63%	78%
Parcels and packets	730	158	78	487	524	206	712	18	450	51	214	491	301	7
	45%	77%	75%	38%	48%	40%	48%	17%	43%	41%	54%	42%	80%	84%
Bulk customer mailings, such as bills, statements, customer packs etc.	268	57	24	186	201	67	263	4	165	21	91	174	97	5
	17%	28%	23%	14%	18%	13%	18%	4%	16%	17%	23%	15%	26%	59%
Advertising and promotional material, such as catalogues, brochures and direct mail	161	30	16	113	118	44	156	5	104	13	46	112	51	4
	10%	14%	16%	9%	11%	9%	10%	5%	10%	10%	12%	10%	13%	51%
Publications, such as magazines, periodicals, customer newsletters	52	9	6	37	40	12	50	2	33	3	11	41	10	*
	3%	4%	5%	3%	4%	2%	3%	2%	3%	2%	3%	4%	3%	6%
Goods / business supplies / large packets ordered via lorry	4	-	-	4	2	2	4	-	2	-	2	2	4	-
	*%	-%	-%	*%	*%	*%	*%	-%	*%	-%	*%	*%	1%	-%
Legal / accounts documents / tax forms	2	*	-	2	2	-	2	-	*	*	2	*	2	-
	*%	*%	-%	*%	*%	-%	*%	-%	*%	*%	*%	*%	1%	-%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of These	44	2	-	41	26	18	38	6	29	5	7	34	3	-
	3%	1%	-%	3%	2%	4%	3%	6%	3%	4%	2%	3%	1%	-%
Other	4	1	-	2	3	1	4	-	1	1	1	2	2	-
	*%	1%	-%	*%	*%	*%	*%	-%	*%	1%	*%	*%	*%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Don't Know

NET: (Large) Letters,
Packets and parcels

NET: Bulk mailings

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1536	204	104	1217	1061	475	1440	96	988	117	382	1123	370	8
96%	99%	100%	95%	97%	93%	96%	90%	95%	95%	97%	96%	98%	100%
c	c	c		b		b							
382	66	30	283	283	99	370	12	247	29	110	267	121	5
24%	32%	29%	22%	26%	20%	25%	11%	24%	24%	28%	23%	32%	59%
c	c			b		b				b			

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Table 17 (continuation)

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QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?
Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Letters

92%

 Other everyday
correspondence, such as
invoices, one off bills
etc.

Large letters

Parcels and packets

 Bulk customer mailings,
such as bills,
statements, customer
packs etc.

 Advertising and
promotional material,
such as catalogues,
brochures and direct
mail

 Publications, such as
magazines, periodicals,
customer newsletters

 Goods / business
supplies / large packets
ordered via lorry

 Legal / accounts
documents / tax forms

Refused

None of These

Other

Don't Know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1478	376	379	364	358
92%	96%	94%	89%	90%
	cd	cd		
1262	333	323	313	293
79%	85%	80%	76%	73%
	cd	d		
904	251	236	222	195
56%	64%	59%	54%	49%
	cd	d		
730	187	191	182	169
45%	48%	47%	44%	42%
268	99	88	47	33
17%	25%	22%	11%	8%
	cd	cd		
161	63	43	22	33
10%	16%	11%	5%	8%
	bcd	c		
52	18	21	3	11
3%	5%	5%	1%	3%
	c	c		c
4	2	*	-	2
1%	1%	1%	0%	1%
2	2	*	-	-
1%	1%	1%	0%	0%
-	-	-	-	-
1%	1%	1%	0%	0%
44	4	6	18	16
3%	1%	1%	4%	4%
			ab	ab
4	*	*	*	3
1%	1%	1%	1%	1%
-	-	-	-	-
1%	1%	1%	0%	0%

Produced by OLR

OFC1885

Issue date: 03/07/13

QV6a. Which of the following types of mail does your organisation send regularly (this is once a month or more frequently than that)?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

NET: (Large) Letters,

Packets and parcels

NET: Bulk mailings

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1536	384	388	390	375
96%	98%	96%	95%	94%
	cd			
382	134	119	66	63
24%	34%	29%	16%	16%
	cd	cd		

Table 18
QV6b1. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Letters
Base: All Respondents who send LETTERS regularly

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1484	62	97	72	109	107	190	123	110	81	194	174	165	951
Weighted total	1478	88	159	103	106	109	255	176	194	84	78	67	60	1273
Standard delivery	1430	86	153	99	103	106	242	172	187	83	77	64	58	1231
	97%	98%	96%	96%	97%	97%	95%	98%	97%	98%	99%	96%	96%	97%
											fk			
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	248	11	30	15	21	17	46	26	28	19	10	13	11	213
	17%	13%	19%	15%	20%	15%	18%	15%	14%	23%	13%	20%	19%	17%
International delivery	164	7	21	15	17	7	32	16	22	9	4	7	8	145
	11%	8%	13%	15%	16%	6%	13%	9%	11%	10%	5%	10%	13%	11%
			j	j	ej		j						j	j
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	157	6	14	13	17	12	39	19	16	6	6	4	4	142
	11%	7%	9%	13%	16%	11%	16%	11%	8%	7%	8%	6%	7%	11%
					jkl		jkl							
Urgent delivery (send / receive mail that needs to arrive rapidly)	121	4	15	11	17	5	24	10	20	6	3	2	3	112
	8%	4%	10%	11%	16%	5%	9%	5%	11%	7%	4%	3%	5%	9%
			k	jk	aegijklm		jk		jk					jk
Cross-Border Delivery	18	-	-	-	-	-	-	-	-	-	-	-	18	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	29%	-%
													abcdefgh ijklm	
Other (PLEASE SPECIFY)	10	2	-	-	3	1	2	2	-	-	-	*	-	9
	1%	2%	-%	-%	2%	1%	1%	1%	-%	-%	-%	1%	-%	1%
		j			jl									
None of these (DO NOT READ OUT)	6	2	-	-	1	1	2	-	-	-	-	-	-	6
	*%	2%	-%	-%	1%	1%	1%	-%	-%	-%	-%	-%	-%	1%
		j												
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	350	15	40	21	28	24	66	37	51	23	15	15	15	306
	24%	17%	25%	20%	27%	22%	26%	21%	26%	28%	19%	22%	25%	24%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

Table 18 (continuation)

QV6b1. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Letters

Base: All Respondents who send LETTERS regularly

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1484	1111	228	54	42	49	373	1012	472	1368	116	919	298	123	144
Weighted total	1478	1417	36	9	7	8	61	1048	430	1421	56	1006	280	102	88
Standard delivery	1430	1371	35	9	7	8	60	1013	417	1376	55	981	268	99	82
	97%	97%	97%	100%	100%	97%	98%	97%	97%	97%	97%	97%	96%	97%	93%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	248	230	9	4	2	3	18	184	63	238	10	129	62	31	26
	17%	16%	26%	40%	24%	40%	30%	18%	15%	17%	17%	13%	22%	30%	29%
			a	ab		a	a						a	a	a
International delivery	164	147	9	4	2	2	17	121	43	157	7	68	42	28	26
	11%	10%	24%	39%	23%	29%	27%	12%	10%	11%	12%	7%	15%	27%	29%
			a	ab	a	a	a						a	ab	ab
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	157	144	7	2	2	2	13	118	39	146	12	81	39	19	19
	11%	10%	20%	22%	24%	27%	22%	11%	9%	10%	21%	8%	14%	18%	21%
			a	a	a	a	a				a		a	a	a
Urgent delivery (send / receive mail that needs to arrive rapidly)	121	112	5	1	1	2	9	93	28	117	3	62	33	11	16
	8%	8%	13%	16%	16%	19%	15%	9%	7%	8%	6%	6%	12%	11%	16%
			a	a	a	a	a						a	a	a
Cross-Border Delivery	18	15	2	*	*	*	3	11	7	17	*	10	3	2	2
	1%	1%	5%	3%	3%	3%	4%	1%	2%	1%	1%	1%	1%	2%	3%
			a				a								
Other (PLEASE SPECIFY)	10	10	-	-	-	-	-	7	3	10	-	1	3	1	4
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-%	1%	1%	1%	5%
													a	a	ab
None of these (DO NOT READ OUT)	6	6	*	-	-	-	*	4	3	6	-	6	-	-	*
	1%	1%	1%	-%	-%	-%	1%	1%	1%	1%	-%	1%	-%	-%	1%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	350	328	12	4	2	4	23	258	92	334	16	196	87	34	33
	24%	23%	34%	45%	31%	45%	37%	25%	21%	23%	29%	19%	31%	34%	37%
			a	a		a	a					a	a	a	a

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 18 (continuation)

QV6b1. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Letters

Base: All Respondents who send LETTERS regularly

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	1484	a	b	c	d	e	f	a	b	c	d	e	a	b	a	b
Weighted total	1478	525	300	213	240	117	76	1260	87	50	49	38	281	106	189	199
		614	306	232	212	76	28	1303	70	38	41	27	258	113	168	203
Standard delivery	1430	592	300	227	203	74	27	1265	63	36	39	27	252	105	164	193
	97%	96%	98%	98%	96%	98%	97%	97%	91%	97%	95%	99%	97%	93%	97%	95%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	248	90	38	54	45	12	8	203	17	11	7	9	59	24	44	38
	17%	15%	13%	23% ab	21% ab	15%	27% abe	16%	25% a	28% a	18% a	34% a	23%	21%	26%	19%
International delivery	164	46	30	28	37	13	7	111	16	12	13	13	51	32	36	46
	11%	8%	10%	12% ab	17% ab	17% abc	25% abc	8%	23% a	32% a	31% a	47% ab	20%	28%	22%	23%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	157	60	22	29	32	7	4	130	8	6	6	7	48	14	37	26
	11%	10%	7%	13% b	15% ab	10%	14%	10%	11%	17%	13%	28% ab	19%	12%	22% b	13%
Urgent delivery (send / receive mail that needs to arrive rapidly)	121	50	22	16	19	7	6	97	9	2	7	6	29	12	24	17
	8%	8%	7%	7%	9%	9%	23% abcde	7%	13%	6%	17% a	21% ac	11%	11%	15%	8%
Cross-Border Delivery	18	5	3	2	4	2	2	15	*	1	1	1	2	2	2	2
	1%	1%	1%	1%	2%	2%	7% abcd	1%	%	2%	3%	3%	1%	2%	1%	1%
Other (PLEASE SPECIFY)	10	1	-	3	-	2	-	7	-	3	-	-	2	1	2	2
	1%	%	-%	1% b	-%	2% abd	-%	1%	-%	8% abd	-%	-%	1%	1%	1%	1%
None of these (DO NOT READ OUT)	6	6	-	-	*	-	-	6	-	-	-	*	1	*	-	1
	%	1%	-%	-%	%	-%	-%	%	-%	-%	-%	1%	1%	%	-%	1%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	350	135	65	66	59	13	9	293	23	13	10	11	79	32	59	51
	24%	22%	21%	29% e	28% e	17%	32% e	22%	33% a	34% a	25%	41% a	31%	28%	35% b	25%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 18 (continuation)

QV6b1. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Letters

Base: All Respondents who send LETTERS regularly

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail		
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services	
Significance Level: 95%															
Unweighted total	1484	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1478	693	289	495	1484	936	1484	730	441	1216	672	1457	292	1186	1091
Standard delivery	1430	722	272	475	1478	878	1478	685	371	1222	634	1445	228	1168	1060
	97%	700	266	456	1430	851	1430	655	359	1186	596	1430	221	1153	1048
		97%	98%	96%	97%	97%	97%	96%	97%	97%	94%	99%	97%	99%	99%
											ac				
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	248														
	17%	109	38	99	248	194	248	168	73	204	248	232	91	214	167
		15%	14%	21%	17%	22%	17%	24%	20%	17%	39%	16%	40%	18%	16%
				ab		acf		acf			b		b		
International delivery	164	52	28	83	164	133	164	129	61	134	136	163	164	146	136
	11%	7%	10%	18%	11%	15%	11%	19%	16%	11%	21%	11%	72%	12%	13%
				ab		acf		abcf	acf		b		ab		
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	157	62	23	73	157	125	157	105	49	131	157	150	60	140	115
	11%	9%	8%	15%	11%	14%	11%	15%	13%	11%	25%	10%	26%	12%	11%
				ab		acf		acf			b		b		
Urgent delivery (send / receive mail that needs to arrive rapidly)	121	44	22	54	121	99	121	83	43	99	121	117	56	112	85
	8%	6%	8%	11%	8%	11%	8%	12%	12%	8%	19%	8%	25%	10%	8%
				a		acf		acf	acf		b		ab		
Cross-Border Delivery	18	8	2	8	18	11	18	10	5	14	9	16	18	13	13
	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	8%	1%	1%
													ab		
Other (PLEASE SPECIFY)	10	-	1	8	10	7	10	8	1	7	6	7	3	5	7
	1%	-%	*%	2%	1%	1%	1%	1%	*%	1%	1%	*%	1%	*%	1%
				a											
None of these (DO NOT READ OUT)	6	6	-	-	6	4	6	1	2	3	*	3	-	3	1
	*%	1%	-%	-%	*%	*%	*%	*%	1%	*%	*%	*%	-%	*%	*%
		c													
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	350	150	59	140	350	265	350	218	99	294	350	325	108	296	239
	24%	21%	22%	30%	24%	30%	24%	32%	27%	24%	55%	22%	47%	25%	23%
				ab		acf		acf			bc		b		

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

Ofcom: Business Postal Tracker

Table 18 (continuation)

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QV6b1. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Letters

Base: All Respondents who send LETTERS regularly

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1484	266	34	1173	1466	1295	1468	1160	1479	-	878	1460	388	145	229	1108
Weighted total	1478	251	36	1181	1453	1258	1456	1130	1471	-	843	1453	336	129	227	1120
Standard delivery	1430	240	29	1148	1406	1214	1409	1085	1424	-	808	1406	329	123	220	1084
	97%	96% b	82%	97% b	97%	96%	97%	96%	97%	-%	96%	97%	98%	96%	97%	97%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	248	42	13	193	244	236	246	213	248	-	182	245	92	31	36	181
	17%	17%	36% ac	16%	17%	19%	17%	19%	17%	-%	22% b	17%	27% ab	24% bc	16%	16%
International delivery	164	33	6	127	160	150	162	133	164	-	117	163	124	28	20	115
	11%	13%	18%	11%	11%	12%	11%	12%	11%	-%	14%	11%	37% ab	21% bc	9%	10%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	157	30	5	123	154	153	155	132	156	-	117	155	65	20	12	125
	11%	12%	14%	10%	11%	12%	11%	12%	11%	-%	14% b	11%	19% ab	16% b	5%	11% b
Urgent delivery (send / receive mail that needs to arrive rapidly)	121	26	4	95	118	119	119	108	121	-	94	119	60	12	14	94
	8%	10%	10%	8%	8%	9%	8%	10%	8%	-%	11% b	8%	18% ab	9%	6%	8%
Cross-Border Delivery	18	4	1	12	18	17	18	15	18	-	14	17	16	2	3	13
	1%	1%	4%	1%	1%	1%	1%	1%	1%	-%	2%	1%	5% ab	1%	1%	1%
Other (PLEASE SPECIFY)	10	2	-	8	10	8	10	9	10	-	5	8	1	3	*	6
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1% bc	2%	1%	1%
None of these (DO NOT READ OUT)	6	2	-	3	6	5	6	5	6	-	5	6	*	*	2	4
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	350	65	15	270	347	336	348	298	348	-	248	348	120	43	50	257
	24%	26%	42% ac	23%	24%	27%	24%	26%	24%	-%	29% b	24%	36% ab	33% bc	22%	23%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Ofcom: Business Postal Tracker

Table 18 (continuation)

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QV6b1. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Letters
Base: All Respondents who send LETTERS regularly

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1484	174	94	1199	1028	456	1391	93	982	114	365	1094	361	9
Weighted total	1478	188	92	1186	1016	462	1383	95	959	115	364	1091	346	7
Standard delivery	1430	182	92	1145	984	446	1337	94	932	109	351	1058	333	7
	97%	97%	100%	96%	97%	97%	97%	99%	97%	95%	96%	97%	96%	98%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	248	39	19	190	185	62	246	2	152	23	61	182	73	*
	17%	21%	20%	16%	18% b	13%	18% b	2%	16%	20%	17%	17%	21%	3%
International delivery	164	44	13	106	121	43	160	4	110	15	46	117	75	*
	11%	23% c	14%	9%	12%	9%	12% b	4%	11%	13%	13%	11%	22%	3%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	157	26	12	118	105	52	153	4	97	15	31	123	52	*
	11%	14%	14%	10%	10%	11%	11% b	4%	10%	13%	9%	11%	15%	5%
Urgent delivery (send / receive mail that needs to arrive rapidly)	121	18	9	94	86	35	121	*	68	14	30	91	39	*
	8%	9%	9%	8%	8%	8%	9% b	*%	7%	13% a	8%	8%	11%	2%
Cross-Border Delivery	18	2	*	14	12	6	17	1	11	1	5	12	4	-
	1%	1%	*%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	-%
Other (PLEASE SPECIFY)	10	3	-	7	3	7	8	1	7	3	3	7	4	-
	1%	2%	-%	1%	*%	1% a	1%	1%	1%	2%	1%	1%	1%	-%
None of these (DO NOT READ OUT)	6	-	-	6	5	1	5	1	1	2	2	3	3	-
	*%	-%	-%	1%	*%	*%	*%	1%	*%	2% a	*%	*%	1%	-%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	350	57	24	268	250	100	344	6	214	29	94	258	99	*
	24%	30% c	27%	23%	25%	22%	25% b	6%	22%	25%	23%	24%	29%	7%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 18 (continuation)

Page 216

QV6b1. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Letters
Base: All Respondents who send LETTERS regularly

Significance Level: 95%

Unweighted total

Weighted total

Standard delivery

 Tracked service (send /
receive mail for which
you need to be able to
monitor its progress
through the postal
system)

International delivery

 Timed delivery (send /
receive mail which is
guaranteed to arrive by
a specific time, e.g. by
9am next day or 1pm next
day delivery)

 Urgent delivery (send /
receive mail that needs
to arrive rapidly)

Cross-Border Delivery

Other (PLEASE SPECIFY)

 None of these (DO NOT
READ OUT)

 Don't Know (DO NOT READ
OUT)

 NET: Urgent / Tracked /
Timed Mail

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1484	388	386	367	343
1478	376	379	364	358
1430	367	371	357	335
97%	98%	98%	98%	93%
	d	d	d	
248	69	67	63	48
17%	18%	18%	17%	14%
164	46	55	35	28
11%	12%	15%	10%	8%
	d	cd		
157	35	47	41	34
11%	9%	12%	11%	9%
121	33	35	24	29
8%	9%	9%	7%	8%
18	3	3	7	5
1%	1%	1%	2%	2%
10	5	2	*	3
1%	1%	1%	1%	1%
6	2	*	1	3
1%	1%	1%	1%	1%
-	-	-	-	-
1%	1%	1%	1%	1%
350	95	98	85	72
24%	25%	26%	23%	20%

Produced by OLR

OFC1885

Issue date: 03/07/13

Table 19

QV6b2. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Large letters

Base: All Respondents who send LARGE LETTERS regularly

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	958	44	69	53	76	62	136	79	64	54	128	96	97	637
Weighted total	904	59	107	72	65	54	173	107	103	52	47	33	32	792
Standard delivery	842	54	105	68	62	50	158	100	92	48	45	30	29	738
	93%	91%	98% h	95%	95%	93%	92%	93%	89%	93%	96%	91%	92%	93%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	167	9	16	13	15	9	28	23	19	12	8	7	7	145
	18%	16%	15%	19%	23%	16%	16%	21%	19%	22%	18%	21%	23%	18%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	110	4	10	15	9	7	26	13	11	2	6	2	5	97
	12%	7%	9%	21% ik	14% i	13%	15% i	12%	11%	4%	13%	7%	15% i	12%
International delivery	107	2	18	8	10	4	27	8	10	7	4	3	6	94
	12%	4%	17% a	11%	15%	7%	15% a	8%	10%	13%	8%	9%	18% agj	12%
Urgent delivery (send / receive mail that needs to arrive rapidly)	92	2	7	17	10	1	19	8	15	6	2	1	4	85
	10%	3%	7%	23% abefgjk m	15% aejk	3%	11% k	7%	15% ejk	11%	5%	4%	12% ek	11% ejk
Cross-Border Delivery	9	-	-	-	-	-	-	-	-	-	-	-	9	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	30% abcdefgh ijklm	-%
Other (PLEASE SPECIFY)	4	2	-	-	-	1	-	-	-	-	-	*	-	3
	*%	3% fjm	-%	-%	-%	2% m	-%	-%	-%	-%	-%	1%	-%	*%
None of these (DO NOT READ OUT)	6	*	-	2	-	-	4	-	-	-	-	-	-	6
	1%	*%	-%	2%	-%	-%	2%	-%	-%	-%	-%	-%	-%	1%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	234	9	25	22	18	12	43	28	30	14	12	9	10	203
	26%	16%	24%	31%	28%	23%	25%	26%	29%	27%	25%	27%	31%	26%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

Ofcom: Business Postal Tracker

Table 19 (continuation)

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QV6b2. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Large letters

Base: All Respondents who send LARGE LETTERS regularly

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	958	644	181	49	40	44	314	679	279	862	96	483	244	103	128
Weighted total	904	853	29	9	7	7	52	651	253	866	38	526	225	76	77
Standard delivery	842	792	28	9	7	7	50	606	236	807	35	482	206	71	73
	93%	93%	96%	100%	100%	96%	97%	93%	93%	93%	91%	94%	91%	93%	95%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	167	153	7	4	1	3	14	123	44	160	7	71	52	18	25
	18%	18%	23%	44%	21%	37%	28%	19%	17%	18%	18%	14%	23%	24%	32%
				abdf		ab	a						a	a	a
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	110	101	4	1	2	1	9	81	29	104	7	55	33	14	8
	12%	12%	15%	16%	26%	17%	17%	13%	11%	12%	17%	10%	15%	18%	11%
				a	a	a	a						a	a	
International delivery	107	94	6	4	2	1	13	84	23	103	3	36	37	13	21
	12%	11%	22%	41%	23%	19%	25%	13%	9%	12%	8%	7%	17%	17%	27%
			a	abef	a		a						a	a	ab
Urgent delivery (send / receive mail that needs to arrive rapidly)	92	86	3	1	1	1	7	70	22	87	5	44	27	11	10
	10%	10%	10%	17%	20%	17%	13%	11%	9%	10%	14%	8%	12%	15%	13%
													a	a	
Cross-Border Delivery	9	8	1	*	*	*	2	6	3	9	1	4	3	1	2
	1%	1%	3%	2%	3%	5%	3%	1%	1%	1%	1%	1%	1%	2%	2%
			a			a	a								
Other (PLEASE SPECIFY)	4	4	-	-	-	-	-	2	2	4	-	-	1	-	2
	1%	1%	0%	0%	0%	0%	0%	1%	1%	1%	0%	0%	1%	0%	3%
															a
None of these (DO NOT READ OUT)	6	5	*	-	-	-	*	4	2	6	-	4	-	-	2
	1%	1%	1%	0%	0%	0%	1%	1%	1%	1%	0%	1%	0%	0%	2%
															b
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
NET: Urgent / Tracked / Timed Mail	234	216	8	4	2	3	18	173	61	225	9	119	66	21	27
	26%	25%	28%	49%	32%	41%	34%	27%	24%	26%	24%	23%	29%	28%	35%
				abf		a	a						a		a

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

Ofcom: Business Postal Tracker

Table 19 (continuation)

Page 219

QV6b2. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Large letters
Base: All Respondents who send LARGE LETTERS regularly

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	958	234	195	158	189	101	69	12	769	72	43	39	35	214	80	152	143
Weighted total	904	278	200	163	166	64	26	8	762	56	31	33	23	180	79	128	131
Standard delivery	842	246	187	157	159	62	23	8	711	49	26	33	22	170	69	118	122
	93%	89%	94%	96%	96%	97%	90%	100%	93%	89%	83%	100%	97%	95%	88%	92%	93%
				a	a	a			c			bc	c				
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	167	46	33	36	30	14	8	1	134	12	9	5	6	39	20	38	21
	18%	16%	16%	22%	18%	21%	31%	12%	18%	22%	28%	17%	28%	22%	25%	29%	16%
							abd									b	
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	110	44	17	20	19	5	4	1	94	5	6	3	3	27	8	25	11
	12%	16%	9%	12%	11%	8%	17%	11%	12%	9%	19%	9%	11%	15%	10%	19%	8%
		be														b	
International delivery	107	19	21	18	29	10	6	3	78	11	4	9	5	38	13	30	22
	12%	7%	10%	11%	17%	16%	23%	36%	10%	20%	13%	28%	21%	21%	17%	23%	17%
					a	a	abc			a		a	a				
Urgent delivery (send / receive mail that needs to arrive rapidly)	92	28	23	17	14	5	5	*	71	10	4	5	2	26	8	22	12
	10%	10%	12%	10%	8%	8%	20%	6%	9%	18%	13%	16%	8%	15%	10%	17%	9%
							acde			a						b	
Cross-Border Delivery	9	2	2	2	2	1	1	-	7	1	1	*	1	3	1	3	1
	1%	1%	1%	1%	1%	2%	4%	-%	1%	1%	2%	1%	3%	1%	1%	2%	1%
							a										*
Other (PLEASE SPECIFY)	4	-	-	-	-	2	-	2	*	-	3	-	-	2	1	2	2
	*%	-%	-%	-%	-%	3%	-%	23%	*%	-%	10%	-%	-%	1%	2%	1%	1%
						abcd					abd						
None of these (DO NOT READ OUT)	6	4	-	-	-	-	2	-	6	-	-	-	-	-	*	-	*
	1%	1%	-%	-%	-%	-%	7%	-%	1%	-%	-%	-%	-%	-%	1%	-%	1%
							abcde										
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	234	75	52	41	40	15	10	1	192	17	10	8	7	52	22	46	28
	26%	27%	26%	25%	24%	23%	38%	14%	25%	31%	30%	24%	29%	29%	28%	36%	21%
							de									b	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 19 (continuation)

QV6b2. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Large letters

Base: All Respondents who send LARGE LETTERS regularly

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	958	373	214	369	936	958	958	585	347	815	534	943	239	830	742
Weighted total	904	360	194	347	878	904	904	518	275	776	473	886	183	780	689
Standard delivery	842	340	177	323	821	842	842	477	259	724	417	842	174	740	660
	93%	94%	91%	93%	93%	93%	93%	92%	94%	93%	88%	95% a	95% a	95%	96%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	167	62	34	70	162	167	167	133	44	137	167	158	64	143	123
	18%	17%	18%	20%	18%	18%	18%	26% abcef	16%	18%	35% b	18%	35% b	18%	18%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	110	37	26	47	106	110	110	84	32	90	110	107	37	100	74
	12%	10%	13%	14%	12%	12%	12%	16% abcf	12%	12%	23% b	12%	20% b	13%	11%
International delivery	107	32	20	55	105	107	107	86	44	92	80	106	107	98	91
	12%	9%	10%	16% a	12%	12%	12%	17% abcf	16% bc	12%	17% b	12%	58% ab	13%	13%
Urgent delivery (send / receive mail that needs to arrive rapidly)	92	28	21	44	90	92	92	73	32	74	92	88	48	84	68
	10%	8%	11%	13% a	10%	10%	10%	14% abcf	12%	10%	20% b	10%	26% ab	11%	10%
Cross-Border Delivery	9	3	2	4	9	9	9	7	3	9	6	9	9	8	8
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	5% ab	1%	1%
Other (PLEASE SPECIFY)	4	-	1	2	4	4	4	4	1	4	1	2	-	*	2
	*%	-%	1%	1%	*%	*%	*%	1%	*%	*%	*%	*%	-%	*%	*%
None of these (DO NOT READ OUT)	6	4	*	2	6	6	6	*	4	4	*	4	-	4	4
	1%	1%	*%	1%	1%	1%	1%	*%	1% d	*%	*%	*%	-%	*%	1%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	234	89	50	93	226	234	234	173	56	193	234	219	77	202	160
	26%	25%	26%	27%	26%	26% e	26% e	33% abcef	20%	25%	49% b	25%	42% b	26%	23%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 19 (continuation)

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QV6b2. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Large letters

Base: All Respondents who send LARGE LETTERS regularly

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	958	188	23	741	953	910	955	798	957	-	626	947	285	105	154	698
Weighted total	904	171	24	706	898	846	899	734	904	-	563	893	230	90	140	673
Standard delivery	842	155	20	664	835	786	837	680	842	-	517	831	214	85	129	628
	93%	91%	83%	94%	93%	93%	93%	93%	93%	-%	92%	93%	93%	94%	92%	93%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	167	37	7	123	167	162	167	151	167	-	131	165	70	16	21	130
	18%	21%	31%	17%	19%	19%	19%	21%	18%	-%	23% b	19%	31% ab	17%	15%	19%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	110	18	6	85	110	110	110	100	110	-	91	108	40	10	16	85
	12%	11%	25%	12%	12%	13%	12%	14%	12%	-%	16% b	12%	17% b	11%	11%	13%
International delivery	107	26	2	80	105	99	105	91	107	-	83	106	83	16	17	73
	12%	15%	8%	11%	12%	12%	12%	12%	12%	-%	15%	12%	36% ab	18% c	12%	11%
Urgent delivery (send / receive mail that needs to arrive rapidly)	92	18	6	70	92	92	92	90	92	-	81	91	55	8	14	70
	10%	11%	25%	10%	10%	11%	10%	12%	10%	-%	14% b	10%	24% ab	9%	10%	10%
Cross-Border Delivery	9	3	1	5	9	9	9	8	9	-	8	9	8	2	2	5
	1%	2%	6%	1%	1%	1%	1%	1%	1%	-%	1%	1%	3% b	2%	2%	1%
Other (PLEASE SPECIFY)	4	-	-	4	4	4	4	3	4	-	*	2	-	2	*	1
	*%	-%	-%	1%	*%	*%	*%	*%	*%	-%	*%	*%	-%	2% c	*%	*%
None of these (DO NOT READ OUT)	6	4	-	2	6	6	6	4	6	-	4	6	*	-	-	6
	1%	2% c	-%	*%	1%	1%	1%	1%	1%	-%	1%	1%	*%	-%	-%	1%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	234	47	10	176	234	229	234	209	234	-	183	232	88	21	33	179
	26%	27%	42%	25%	26%	27%	26%	29%	26%	-%	33% b	26%	38% b	23%	24%	27%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 19 (continuation)

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QV6b2. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Large letters
Base: All Respondents who send LARGE LETTERS regularly

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	958	119	69	758	698	260	935	23	626	78	255	686	269	8
Weighted total	904	114	63	722	661	243	876	28	580	73	243	647	236	6
Standard delivery	842	104	54	678	615	227	814	28	544	69	229	602	220	6
	93%	91%	87%	94% b	93%	93%	93%	100%	94%	95%	94%	93%	93%	100%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	167	28	17	121	125	42	164	3	100	15	42	120	51	*
	18%	25% c	27% c	17%	19%	17%	19%	11%	17%	21%	17%	18%	21%	3%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	110	13	5	91	81	29	110	-	69	5	32	74	30	*
	12%	12%	9%	13%	12%	12%	13%	-%	12%	7%	13%	11%	13%	3%
International delivery	107	26	7	73	77	29	102	5	75	3	28	79	47	*
	12%	23% c	11%	10%	12%	12%	12%	17%	13% b	4%	11%	12%	20%	3%
Urgent delivery (send / receive mail that needs to arrive rapidly)	92	12	3	77	70	23	91	1	55	8	23	67	28	-
	10%	11%	4%	11%	11%	9%	10%	5%	10%	10%	9%	10%	12%	-%
Cross-Border Delivery	9	1	*	8	7	3	9	-	4	1	4	5	4	-
	1%	1%	*%	1%	1%	1%	1%	-%	1%	1%	2%	1%	1%	-%
Other (PLEASE SPECIFY)	4	2	-	2	2	2	4	-	2	1	1	2	4	-
	*%	2% c	-%	*%	*%	1%	*%	-%	*%	2%	1%	*%	2%	-%
None of these (DO NOT READ OUT)	6	-	2	4	4	2	6	-	4	-	-	6	*	-
	1%	-%	3% c	1%	1%	1%	1%	-%	1%	-%	-%	1%	*%	-%
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	234	36	19	178	177	57	231	3	145	19	61	165	66	*
	26%	32%	31%	25%	27%	23%	26%	11%	25%	26%	25%	25%	28%	3%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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QV6b2. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Large letters
Base: All Respondents who send LARGE LETTERS regularly

Significance Level: 95%

Unweighted total

Weighted total

Standard delivery

 Tracked service (send /
receive mail for which
you need to be able to
monitor its progress
through the postal
system)

 Timed delivery (send /
receive mail which is
guaranteed to arrive by
a specific time, e.g. by
9am next day or 1pm next
day delivery)

International delivery

 Urgent delivery (send /
receive mail that needs
to arrive rapidly)

Cross-Border Delivery

Other (PLEASE SPECIFY)

 None of these (DO NOT
READ OUT)

 Don't Know (DO NOT READ
OUT)

 NET: Urgent / Tracked /
Timed Mail

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
958	274	257	232	195
904	251	236	222	195
842	237	225	203	177
93%	95%	95%	91%	91%
		d		
167	42	38	49	38
18%	17%	16%	22%	19%
110	22	26	40	21
12%	9%	11%	18%	11%
			abd	
107	24	41	21	20
12%	10%	18%	9%	10%
		acd		
92	23	27	26	16
10%	9%	12%	12%	8%
9	2	1	4	2
1%	1%	1%	2%	1%
4	3	-	*	-
1%	1%	-%	1%	-%
6	2	2	2	-
1%	1%	1%	1%	-%
-	-	-	-	-
1%	-%	-%	-%	-%
234	61	58	65	50
26%	24%	25%	29%	26%

QV6b3. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Parcels and packets
Base: All Respondents who send PARCELS AND PACKETS regularly

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	766	27	54	46	55	46	109	69	58	48	112	73	69	512
Weighted total	730	34	86	61	49	42	134	94	94	46	42	26	22	640
Standard delivery	486	26	54	28	42	26	93	63	62	27	29	18	17	421
	67%	78%	63%	46%	bcefhghijm	62%	70%	67%	66%	59%	69%	70%	79%	66%
							c	c	c		c	c	bceilm	c
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	326	15	45	28	22	16	69	28	40	21	21	14	9	283
	45%	44%	52%	45%	44%	37%	51%	30%	43%	46%	49%	53%	40%	44%
			g				g				g	g		g
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	214	11	24	29	9	13	39	26	29	13	10	8	2	193
	29%	32%	28%	48%	18%	30%	29%	28%	31%	28%	24%	33%	10%	30%
			lbdfgjil			l	l	l	l	l	l	l		l
				m										
International delivery	125	4	15	15	6	7	32	10	16	8	5	4	3	113
	17%	12%	17%	24%	13%	17%	24%	10%	17%	18%	11%	14%	13%	18%
				gi			gi							
Urgent delivery (send / receive mail that needs to arrive rapidly)	95	2	10	15	7	7	17	13	11	2	5	3	2	85
	13%	6%	12%	24%	14%	17%	13%	14%	12%	5%	11%	10%	11%	13%
				ijkm										
Cross-Border Delivery	9	-	-	-	-	-	-	-	-	-	-	-	9	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	41%	-%
													bcddefghi	
													jk m	
Other (PLEASE SPECIFY)	10	-	-	2	3	-	2	-	-	-	3	1	1	6
	1%	-%	-%	3%	5%	-%	1%	-%	-%	-%	7%	2%	3%	7%
					m						bdfghm			
None of these (DO NOT READ OUT)	11	2	2	-	-	-	2	2	2	1	*	-	-	11
	2%	5%	2%	-%	-%	-%	1%	2%	2%	3%	*%	-%	-%	2%
Don't Know (DO NOT READ OUT)	2	-	-	-	-	-	2	-	-	-	-	-	-	2
	*%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	*%
NET: Urgent / Tracked / Timed Mail	451	17	58	46	26	27	85	54	54	30	26	17	10	398
	62%	50%	68%	75%	53%	64%	64%	57%	58%	67%	61%	67%	45%	62%
			l	dl			l			l	l	l		l
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 20 (continuation)

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QV6b3. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Parcels and packets

Base: All Respondents who send PARCELS AND PACKETS regularly

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	*d	e	f	a	b	a	b	a	b	c	d
Unweighted total	766	520	142	39	28	37	246	549	217	692	74	337	193	105	131
Weighted total	730	689	23	7	4	6	40	536	193	695	34	369	183	92	85
Standard delivery	486	455	17	6	4	4	31	346	139	466	20	249	125	62	50
	67%	66%	75%	83%	81%	74%	77%	65%	72%	67%	58%	68%	68%	67%	59%
			a	a			a		a						
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	326	308	10	5	1	2	19	242	84	319	7	132	79	56	59
	45%	45%	43%	69%	30%	40%	46%	45%	43%	46%	21%	36%	43%	60%	70%
				abef						b				ab	ab
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	214	200	7	3	2	1	13	166	48	204	9	95	58	32	29
	29%	29%	32%	35%	45%	22%	33%	31%	25%	29%	27%	26%	31%	34%	35%
International delivery	125	113	6	4	1	1	12	96	28	121	3	38	33	18	35
	17%	16%	24%	50%	30%	17%	29%	18%	15%	17%	10%	10%	18%	20%	41%
			a	abef			a						a	a	abc
Urgent delivery (send / receive mail that needs to arrive rapidly)	95	86	5	2	1	1	8	70	24	90	5	31	24	16	23
	13%	13%	20%	25%	21%	16%	21%	13%	13%	13%	13%	8%	13%	18%	28%
			a	a			a							a	ab
Cross-Border Delivery	9	8	1	*	*	*	1	4	5	9	*	5	1	1	3
	1%	1%	2%	3%	8%	4%	3%	1%	3%	1%	1%	1%	1%	1%	3%
							a		a						b
Other (PLEASE SPECIFY)	10	10	*	-	-	-	*	7	3	10	*	6	3	*	*
	1%	1%	2%	-	-	-	1%	1%	2%	1%	1%	2%	2%	2%	1%
None of these (DO NOT READ OUT)	11	11	*	-	-	-	*	4	7	11	-	9	*	-	2
	2%	2%	1%	-	-	-	1%	1%	4%	2%	-	2%	1%	-	2%
									a			b			
Don't Know (DO NOT READ OUT)	2	2	-	-	-	-	-	2	-	2	-	2	-	-	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
NET: Urgent / Tracked / Timed Mail	451	426	13	6	3	3	25	341	109	435	15	201	119	67	64
	62%	62%	59%	75%	60%	52%	61%	64%	57%	63%	44%	54%	65%	72%	76%
				e						b			a	a	ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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QV6b3. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Parcels and packets

Base: All Respondents who send PARCELS AND PACKETS regularly

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	766	203	153	118	152	75	53	12	543	85	54	46	38	238	103	156	186
Weighted total	730	242	153	125	132	53	17	8	552	68	43	41	26	209	110	131	188
Standard delivery	486	133	106	88	104	39	12	4	373	42	20	29	23	136	56	92	100
	67%	55%	69%	70%	78%	74%	72%	52%	68%	61%	45%	71%	89%	65%	51%	70%	53%
			a	a	a	a	a		c			c	abcd	b		b	
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	326	111	64	60	53	26	11	1	225	31	21	27	22	107	72	63	117
	45%	46%	42%	48%	40%	49%	65%	12%	41%	45%	48%	67%	85%	51%	66%	48%	62%
							abcd				abc	abc		a		a	
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	214	77	41	31	39	16	6	3	153	21	21	10	8	69	46	44	71
	29%	32%	27%	25%	30%	31%	38%	32%	28%	32%	48%	24%	30%	33%	42%	33%	38%
											abd						
International delivery	125	41	19	23	24	10	6	1	72	15	14	11	11	47	35	31	51
	17%	17%	13%	18%	18%	19%	32%	12%	13%	23%	33%	28%	42%	22%	32%	24%	27%
							abcd			a	a	a	ab				
Urgent delivery (send / receive mail that needs to arrive rapidly)	95	26	23	13	20	7	6	*	56	8	10	9	12	29	21	18	32
	13%	11%	15%	10%	15%	13%	37%	6%	10%	11%	22%	22%	47%	14%	19%	14%	17%
							abcde				a	a	abcd				
Cross-Border Delivery	9	2	2	1	2	1	1	-	5	1	1	1	1	3	1	2	1
	1%	1%	1%	1%	2%	1%	5%	-%	1%	1%	2%	3%	4%	1%	1%	2%	1%
							a						a				
Other (PLEASE SPECIFY)	10	2	3	4	1	1	*	-	9	1	-	-	-	6	1	2	5
	1%	1%	2%	3%	1%	1%	1%	-%	2%	2%	-%	-%	-%	3%	1%	2%	3%
None of these (DO NOT READ OUT)	11	6	4	-	*	-	-	2	9	-	2	-	-	4	-	4	*
	2%	2%	2%	-%	*%	-%	-%	23%	2%	-%	4%	-%	-%	2%	-%	3%	*%
															b		
Don't Know (DO NOT READ OUT)	2	2	-	-	-	-	-	-	2	-	-	-	-	-	-	-	-
	*%	1%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Urgent / Tracked / Timed Mail	451	163	92	76	71	31	14	3	326	43	30	29	23	142	89	84	147
	62%	68%	60%	61%	54%	59%	82%	35%	59%	63%	69%	72%	88%	68%	81%	64%	78%
		d					abcde					abc		a		a	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Table 20 (continuation)

QV6b3. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Parcels and packets

Base: All Respondents who send PARCELS AND PACKETS regularly

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	766	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	730	307	155	300	730	585	739	766	296	636	558	735	235	624	566
Standard delivery	486	293	143	289	685	518	697	730	228	602	527	689	191	570	526
	67%	193	92	201	468	368	474	486	162	414	301	486	150	408	374
		66%	64%	69%	68%	71%	68%	67%	71%	69%	57%	71% a	78% ab	72%	71%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	326	128	64	132	306	232	310	326	104	266	326	307	111	258	242
	45%	44%	45%	46%	45%	45%	44%	45%	46%	44%	62% b	45%	58% b	45%	46%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	214	84	45	82	199	146	203	214	71	179	214	193	65	165	144
	29%	29%	31%	28%	29%	28%	29%	29%	31%	30%	41% b	28%	34%	29%	27%
International delivery	125	41	20	63	121	97	121	125	50	101	106	121	125	104	102
	17%	14%	14%	22% a	18%	19%	17%	17%	22%	17%	20%	18%	65% ab	18%	19%
Urgent delivery (send / receive mail that needs to arrive rapidly)	95	27	20	47	94	72	94	95	43	79	95	91	40	84	72
	13%	9%	14%	16% a	14%	14%	13%	13%	19% abcd	13%	18% b	13%	21% b	15%	14%
Cross-Border Delivery	9	3	1	5	9	7	9	9	4	6	6	9	9	7	9
	1%	1%	%	2%	1%	1%	1%	1%	2% e	1%	1%	1%	5% ab	1%	2%
Other (PLEASE SPECIFY)	10	4	*	6	10	8	10	10	2	9	8	10	*	9	5
	1%	1%	%	2%	2%	2%	2%	1%	1%	1%	2%	2%	%	2%	1%
None of these (DO NOT READ OUT)	11	5	2	4	9	5	9	11	*	9	*	9	-	2	9
	2%	2%	1%	1%	1%	1%	1%	2% e	%	2%	%	1% a	-%	% a	2% a
Don't Know (DO NOT READ OUT)	2	-	2	-	2	-	2	-	-	2	2	2	-	2	2
	%	-%	1%	-%	%	-%	%	%	-%	%	%	%	-%	%	%
NET: Urgent / Tracked / Timed Mail	451	178	91	178	418	308	426	451	141	366	451	414	129	349	314
	62%	61%	64%	61%	61%	59%	61%	62%	62%	61%	85% bc	60%	68% b	61%	60%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 20 (continuation)

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QV6b3. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Parcels and packets

Base: All Respondents who send PARCELS AND PACKETS regularly

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	766	147	20	585	756	715	760	700	765	-	537	761	271	106	111	547
Weighted total	730	131	21	560	716	669	721	654	728	-	494	724	227	96	103	529
Standard delivery	486	98	12	361	478	451	481	444	484	-	319	484	170	57	68	360
	67%	75% c	60%	64%	67%	67%	67%	68%	66%	-%	65%	67%	75% ab	59%	66%	68%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	326	71	9	243	320	304	322	296	326	-	251	322	134	66	42	218
	45%	54% c	43%	43%	45%	45%	45%	45%	45%	-%	51% b	45%	59% ab	68% bc	41%	41%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	214	36	11	162	210	200	214	194	214	-	164	212	76	35	27	151
	29%	28%	54%	29%	29%	30%	30%	30%	29%	-%	33%	29%	33%	37%	26%	29%
International delivery	125	26	3	94	120	110	121	110	125	-	91	125	97	28	11	84
	17%	20%	14%	17%	17%	17%	17%	17%	17%	-%	18%	17%	43% ab	29% bc	11%	16%
Urgent delivery (send / receive mail that needs to arrive rapidly)	95	22	3	70	93	88	95	86	95	-	76	93	51	19	14	62
	13%	17%	16%	13%	13%	13%	13%	13%	13%	-%	15%	13%	23% ab	19% c	14%	12%
Cross-Border Delivery	9	3	-	6	9	9	9	9	9	-	8	9	8	2	2	5
	1%	2%	-%	1%	1%	1%	1%	1%	1%	-%	2%	1%	4% b	2%	2%	1%
Other (PLEASE SPECIFY)	10	1	*	9	10	10	10	10	10	-	7	10	-	1	2	7
	1%	1%	1%	2%	1%	1%	1%	2%	1%	-%	2% c	1% c	-%	1%	2%	1%
None of these (DO NOT READ OUT)	11	2	-	7	11	8	11	4	11	-	4	9	-	2	8	1
	2%	1%	-%	1%	2%	1%	2%	1%	2%	-%	1%	1%	-%	2% c	8% c	*%
Don't Know (DO NOT READ OUT)	2	2	-	-	2	2	2	2	2	-	2	2	2	-	-	2
	*%	1% c	-%	-%	*%	*%	*%	*%	*%	-%	*%	*%	1%	-%	-%	*%
NET: Urgent / Tracked / Timed Mail	451	79	13	350	442	418	447	410	451	-	345	447	161	78	58	314
	62%	60%	64%	63%	62%	62%	62%	63%	62%	-%	70% b	62%	71% b	81% bc	56%	59%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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QV6b3. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Parcels and packets
Base: All Respondents who send PARCELS AND PACKETS regularly

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	766	145	76	532	553	213	750	16	488	54	221	523	315	9
Weighted total	730	158	78	487	524	206	712	18	450	51	214	491	301	7
Standard delivery	486	87	48	345	345	141	473	13	292	32	135	332	181	3
	67%	55%	61%	71% a	66%	68%	66%	71%	65%	62%	63%	68%	60%	42%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	326	88	50	186	251	75	321	5	203	24	118	202	169	3
	45%	56% c	64% c	38%	48% b	37%	45%	31%	45%	47%	55% b	41%	56%	47%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	214	55	20	139	153	60	208	6	121	16	71	135	107	*
	29%	35%	25%	28%	29%	29%	29%	33%	27%	32%	33%	28%	36%	3%
International delivery	125	42	16	66	89	36	123	2	81	7	46	75	75	2
	17%	27% c	21%	14%	17%	17%	17%	10%	18%	13%	22% b	15%	25%	29%
Urgent delivery (send / receive mail that needs to arrive rapidly)	95	16	15	63	63	32	94	1	45	7	40	54	44	-
	13%	10%	20% a	13%	12%	15%	13%	5%	10%	15%	19% b	11%	15%	-%
Cross-Border Delivery	9	2	*	6	6	3	9	*	5	-	2	7	3	-
	1%	1%	1%	1%	1%	1%	1%	3%	1%	-%	1%	1%	1%	-%
Other (PLEASE SPECIFY)	10	2	1	7	7	4	10	*	2	3	3	7	7	*
	1%	1%	1%	1%	1%	2%	1%	3%	1%	6% a	1%	2%	2%	7%
None of these (DO NOT READ OUT)	11	4	-	7	9	2	11	-	7	-	-	9	6	-
	2%	3%	-%	1%	2%	1%	2%	-%	2%	-%	-%	2% a	2%	-%
Don't Know (DO NOT READ OUT)	2	-	2	-	-	2	-	2	-	-	-	2	-	-
	*%	-%	2% c	-%	-%	1% a	-%	10%	-%	-%	-%	*%	-%	-%
NET: Urgent / Tracked / Timed Mail	451	112	59	277	332	118	440	10	277	35	154	285	220	3
	62%	71% c	76% c	57%	63%	57%	62%	58%	62%	69%	72% b	58%	73%	47%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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QV6b3. Which of the following types of services does your organisation regularly use when sending each of the types of mail you mentioned? So for: Parcels and packets
Base: All Respondents who send PARCELS AND PACKETS regularly

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	766	212	209	184	161
Weighted total	730	187	191	182	169
Standard delivery	486	134	140	117	95
	67%	72%	73%	64%	56%
		d	d		
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	326	101	74	79	72
	45%	54%	38%	44%	43%
		bcd			
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	214	42	53	66	54
	29%	22%	27%	36%	32%
		a		a	
International delivery	125	34	30	31	30
	17%	18%	16%	17%	18%
Urgent delivery (send / receive mail that needs to arrive rapidly)	95	32	26	21	16
	13%	17%	13%	12%	10%
		d			
Cross-Border Delivery	9	2	1	3	3
	1%	1%	1%	2%	2%
Other (PLEASE SPECIFY)	10	5	*	3	2
	1%	3%	1%	2%	1%
		b			
None of these (DO NOT READ OUT)	11	2	5	2	2
	2%	1%	3%	1%	1%
Don't Know (DO NOT READ OUT)	2	-	-	2	-
	0%	0%	0%	1%	0%
NET: Urgent / Tracked / Timed Mail	451	122	109	113	107
	62%	65%	57%	62%	63%

Columns Tested: a,b,c,d

QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	654	20	49	37	47	48	91	54	50	39	79	75	65	435
Weighted total	627	28	79	51	41	46	114	70	83	38	30	26	21	549
Recorded delivery - Signed for	437	24	52	30	30	27	73	50	63	30	20	20	18	379
	70%	87%	66%	58%	74%	59%	64%	71%	76%	79%	66%	78%	83%	69%
											ce		bcefjm	
Special delivery - Next Day (by 1pm)	334	15	31	33	23	25	67	44	37	17	18	14	9	292
	53%	54%	39%	65%	57%	55%	59%	63%	44%	44%	60%	56%	43%	53%
				bl			b	bl			bl			
Royal Mail Tracked	177	13	19	10	17	9	33	26	17	11	10	9	4	154
	28%	46%	24%	19%	42%	19%	29%	37%	20%	29%	33%	36%	17%	28%
					cehlm			el			l	el		
Special delivery by 9am	146	6	21	10	14	18	24	21	5	9	9	6	3	128
	23%	20%	26%	19%	35%	39%	21%	30%	6%	24%	31%	22%	13%	23%
			h		hl	cfhklm	h	hl		h	hl	h		h
I send urgent or tracked mail by a carrier other than Royal Mail (PLEASE SPECIFY)	85	4	15	7	2	4	15	9	13	6	3	3	4	76
	14%	14%	19%	14%	5%	9%	14%	13%	16%	15%	9%	10%	17%	14%
			d											
I send urgent or tracked mail by TNT	35	4	2	-	*	1	16	2	4	3	*	*	1	33
	6%	13%	3%	-%	1%	3%	14%	3%	5%	7%	2%	2%	3%	6%
							bcdegjklm							
I send urgent or tracked mail by UPS	25	-	5	2	1	1	9	2	2	1	1	*	-	24
	4%	-%	6%	3%	3%	3%	8%	3%	3%	4%	4%	2%	-%	4%
							l							
I send urgent or tracked mail by Fedex	19	2	-	2	1	1	6	*	5	1	*	*	-	18
	3%	6%	-%	3%	4%	3%	5%	*%	6%	3%	2%	2%	-%	3%
									l					
I send urgent or tracked mail by DHL	15	-	3	*	3	*	4	4	-	1	1	*	*	14
	2%	-%	4%	*%	6%	*%	3%	5%	-%	3%	2%	1%	1%	3%
I send urgent or tracked mail by UK Mail	11	2	-	2	-	-	4	-	2	1	-	*	-	11
	2%	6%	-%	3%	-%	-%	3%	-%	3%	3%	-%	*%	-%	2%
I send urgent or tracked mail by Interlink	11	-	-	2	1	1	2	2	*	-	1	1	-	9
	2%	-%	-%	3%	3%	3%	2%	3%	*%	-%	2%	4%	-%	2%
I send urgent or tracked mail by City Link	10	-	-	2	1	1	-	2	-	1	2	-	-	8
	2%	-%	-%	3%	4%	3%	-%	3%	-%	3%	6%	-%	-%	1%
											fkml			
I send urgent or tracked mail by a local company	8	-	*	-	1	1	4	-	-	1	-	*	-	8
	1%	-%	*%	-%	3%	3%	3%	-%	-%	3%	-%	*%	-%	1%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

Significance Level: 95%
Unweighted total
Weighted total
I send urgent or tracked
mail by Parcel Force

Refused

None of these

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
654	a 20	b 49	c 37	d 47	e 48	f 91	g 54	h 50	i 39	j 79	k 75	l 65	m 435
627	28	79	51	41	46	114	70	83	38	30	26	21	549
7	-	2	2	-	*	-	2	-	1	-	-	-	7
1%	-%	3%	3%	-%	1%	-%	3%	-%	3%	-%	-%	-%	1%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
14	-	2	4	3	1	2	-	-	-	2	*	1	12
2%	-%	3%	7%	6%	3%	2%	-%	-%	-%	5%	1%	3%	2%
3	-	2	-	-	1	-	-	-	-	-	-	-	3
1%	-%	3%	-%	-%	3%	-%	-%	-%	-%	-%	-%	-%	1%

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?
Base: All those using RM urgent or tracked mail services

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	654	448	114	38	26	28	206	472	182	596	58	306	156	84	108
Weighted total	627	593	19	7	4	5	34	470	156	603	24	332	148	76	71
Recorded delivery - Signed for	437	411	14	6	4	3	26	326	111	422	15	231	100	51	55
	70%	69%	77%	83%	91%	62%	78% a	69%	71%	70%	61%	70%	68%	67%	77%
Special delivery - Next Day (by 1pm)	334	311	11	5	3	3	22	245	89	321	13	164	96	38	35
	53%	52%	62%	67%	83%	65%	66% a	52%	57%	53%	53%	50%	65% acd	50%	50%
Royal Mail Tracked	177	167	5	3	1	2	11	123	54	167	10	89	49	19	20
	28%	28%	27%	46% ab	26%	33%	32%	26%	35% a	28%	42% a	27%	33%	26%	28%
Special delivery by 9am	146	134	6	2	2	2	11	113	33	138	8	70	42	17	17
	23%	23%	32% a	35%	41%	34%	34% a	24%	21%	23%	33%	21%	29%	23%	24%
I send urgent or tracked mail by a carrier other than Royal Mail (PLEASE SPECIFY)	85	78	5	1	1	1	8	70	16	81	4	33	23	14	15
	14%	13%	25% a	17%	17%	29%	23% a	15%	10%	13%	17%	10%	15%	19% a	22% a
I send urgent or tracked mail by TNT	35	33	1	*	*	*	1	24	11	33	2	15	10	2	8
	6%	6%	6%	2%	3%	4%	4%	5%	7%	5%	7%	4%	7%	3%	11% ac
I send urgent or tracked mail by UPS	25	24	*	*	-	1	1	19	6	23	2	2	3	10	10
	4%	4%	2%	2%	-%	14%	3%	4%	4%	4%	10% a	1%	2%	14% ab	14% ab
I send urgent or tracked mail by Fedex	19	18	*	1	-	*	1	15	4	19	*	8	4	4	3
	3%	3%	1%	8% b	-%	10%	3%	3%	3%	3%	2%	2%	3%	6%	4%
I send urgent or tracked mail by DHL	15	14	1	*	*	*	2	15	1	13	2	11	*	2	2
	2%	2%	4%	3%	8%	9%	5% a	3% b	*%	2%	9% a	3% b	*%	3%	3% b
I send urgent or tracked mail by UK Mail	11	11	-	-	*	-	*	9	2	11	*	*	2	3	5
	2%	2%	-%	-%	3%	-%	*%	2%	1%	2%	*%	*%	1% a	4% a	8% ab
I send urgent or tracked mail by Interlink	11	9	1	-	*	-	1	7	4	11	-	4	2	4	1
	2%	2%	5% a	-%	4%	-%	3%	1%	2%	2%	-%	1%	1%	6% ab	1%
I send urgent or tracked mail by City Link	10	9	-	*	-	-	*	6	4	8	1	6	-	2	1
	2%	2%	-%	3%	-%	-%	1%	1%	2%	1%	5% a	2%	-%	3% b	2%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

Significance Level: 95%

Unweighted total

Weighted total

I send urgent or tracked

mail by a local company

I send urgent or tracked

mail by Parcel Force

Refused

None of these

Don't know

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	*d	*e	f	a	b	a	b	a	b	c	d
654	448	114	38	26	28	206	472	182	596	58	306	156	84	108
627	593	19	7	4	5	34	470	156	603	24	332	148	76	71
8	7	-	-	*	*	*	2	6	8	*	3	3	*	2
1%	1%	-%	-%	8%	2%	1%	1%	4%	1%	1%	1%	2%	1%	3%
								a						
7	7	*	-	*	-	*	6	2	6	1	3	2	*	2
1%	1%	1%	-%	5%	-%	1%	1%	1%	1%	5%	1%	1%	1%	3%
										a				
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
14	13	1	-	-	-	1	13	1	14	*	7	4	3	*
2%	2%	3%	-%	-%	-%	2%	3%	1%	2%	1%	2%	2%	4%	1%
3	3	-	-	-	-	-	1	2	3	-	3	-	-	-
1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-%	1%	-%	-%	-%

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	654	195	129	95	128	54	45	8	494	55	37	35	33	192	89	131	151
Weighted total	627	239	131	95	106	35	16	5	492	51	29	32	23	169	93	108	154
Recorded delivery - Signed for	437	163	92	68	70	26	15	3	340	44	17	20	16	101	66	72	94
	70%	68%	71%	71%	66%	74%	94%	61%	69%	86%	60%	64%	68%	60%	71%	67%	61%
							abcde			acd							
Special delivery - Next Day (by 1pm)	334	126	69	52	55	19	8	4	272	27	9	14	11	87	43	60	70
	53%	53%	53%	55%	52%	53%	48%	97%	55%	53%	32%	45%	49%	52%	46%	56%	45%
									c	c							
Royal Mail Tracked	177	67	34	37	27	9	5	*	141	18	4	11	3	41	28	31	37
	28%	28%	26%	38%	25%	25%	30%	10%	29%	36%	13%	36%	12%	24%	30%	29%	24%
				bd					ce	ce		ce					
Special delivery by 9am	146	50	30	25	26	11	2	1	114	16	6	7	4	36	19	17	38
	23%	21%	23%	26%	25%	32%	16%	18%	23%	30%	20%	21%	16%	22%	21%	16%	25%
I send urgent or tracked mail by a carrier other than Royal Mail (PLEASE SPECIFY)	85	22	20	19	17	3	2	2	58	10	4	5	7	44	22	26	39
	14%	9%	15%	20%	16%	9%	13%	39%	12%	19%	15%	17%	33%	26%	23%	24%	26%
				a									a				
I send urgent or tracked mail by TNT	35	9	15	2	5	2	1	-	21	4	-	5	4	19	6	8	17
	6%	4%	12%	2%	4%	5%	9%	-%	4%	8%	-%	17%	16%	11%	6%	8%	11%
			acd									ac	ac				
I send urgent or tracked mail by UPS	25	4	6	4	4	6	2	*	14	*	2	7	2	16	6	11	10
	4%	1%	5%	4%	4%	16%	13%	2%	3%	%	6%	23%	11%	9%	6%	10%	6%
						abcd	acd					ab	ab				
I send urgent or tracked mail by Fedex	19	5	7	3	3	-	1	-	11	-	4	2	2	7	10	6	12
	3%	2%	5%	3%	3%	-%	4%	-%	2%	-%	13%	7%	11%	4%	11%	5%	7%
											ab		ab		a		
I send urgent or tracked mail by DHL	15	10	3	*	1	*	1	*	12	2	1	*	-	5	2	*	6
	2%	4%	3%	%	1%	1%	4%	2%	2%	4%	3%	1%	-%	3%	2%	%	4%
		cd															a
I send urgent or tracked mail by UK Mail	11	2	2	1	2	4	-	-	3	4	-	2	2	3	7	3	7
	2%	1%	1%	1%	2%	10%	-%	-%	1%	8%	-%	6%	8%	2%	8%	3%	5%
						abcd				a		a	a		a		
I send urgent or tracked mail by Interlink	11	3	-	2	1	3	*	-	5	1	2	2	*	5	3	2	6
	2%	1%	-%	2%	1%	9%	2%	-%	1%	3%	6%	7%	2%	3%	3%	2%	4%
						abd					a	a					
I send urgent or tracked mail by City Link	10	4	3	1	-	-	1	*	6	-	2	-	1	5	2	3	4
	2%	1%	2%	1%	-%	-%	8%	4%	1%	-%	8%	-%	7%	3%	2%	3%	3%
							acde				ab		a				

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 21 (continuation)

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	654	195	129	95	128	54	45	8	494	55	37	35	33	192	89	131	151
Weighted total	627	239	131	95	106	35	16	5	492	51	29	32	23	169	93	108	154
I send urgent or tracked mail by a local company	8	-	3	4	-	1	-	-	5	1	-	2	-	3	2	3	2
	1%	-%	2%	4%	-%	4%	-%	-%	1%	3%	-%	6%	-%	2%	2%	3%	1%
			a	ad		ad						a					
I send urgent or tracked mail by Parcel Force	7	3	4	-	-	-	*	-	5	-	-	2	-	5	*	2	4
	1%	1%	3%	-%	-%	-%	1%	-%	1%	-%	-%	7%	-%	3%	4%	2%	2%
												ab					
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of these	14	6	*	3	2	1	*	-	9	-	1	3	*	3	4	4	4
	2%	3%	4%	3%	2%	4%	1%	-%	2%	-%	5%	10%	1%	2%	4%	3%	2%
												ab					
Don't know	3	1	2	-	-	-	-	-	3	-	-	-	-	-	-	-	-
	1%	1%	2%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 21 (continuation)

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	654	265	133	253	630	502	637	527	221	537	654	619	212	555	485
Weighted total	627	261	125	238	597	448	605	500	176	512	627	581	175	515	446
Recorded delivery - Signed for	437	173	95	165	416	332	425	340	127	361	437	416	125	380	316
	70%	66%	76%	70%	70%	74% d	70%	68%	72%	70%	70%	71%	72%	74%	71%
Special delivery - Next Day (by 1pm)	334	134	62	136	319	251	321	261	92	276	334	306	97	278	233
	53%	51%	49%	57%	53%	56%	53%	52%	53%	54%	53%	53%	56%	54%	52%
Royal Mail Tracked	177	71	30	76	173	131	173	144	50	147	177	166	54	155	119
	28%	27%	24%	32%	29%	29%	29%	28%	28%	29%	28%	29%	31%	30%	27%
Special delivery by 9am	146	50	23	71	146	119	146	114	47	119	146	139	48	130	104
	23%	19%	19%	30% ab	24%	27%	24%	23%	27%	23%	23%	24%	28%	25%	23%
I send urgent or tracked mail by a carrier other than Royal Mail (PLEASE SPECIFY)	85	31	16	37	84	56	84	81	34	73	85	83	36	65	68
	14%	12%	13%	16%	14%	12%	14%	16%	19% bc	14%	14%	14%	21% ab	13%	15%
I send urgent or tracked mail by TNT	35	20	4	10	33	26	33	31	4	29	35	29	14	29	20
	6%	8%	4%	4%	6%	6% e	5%	6% e	2%	6%	6%	5%	8%	6%	4%
I send urgent or tracked mail by UPS	25	8	4	13	25	22	25	25	13	22	25	24	16	23	21
	4%	3%	3%	6%	4%	5%	4%	5%	7%	4%	4%	4%	9% ab	5%	5%
I send urgent or tracked mail by Fedex	19	7	4	8	19	14	19	19	8	14	19	19	11	15	19
	3%	3%	3%	4%	3%	3%	3%	4%	4%	3%	3%	3%	6% a	3%	4%
I send urgent or tracked mail by DHL	15	11	3	2	14	11	14	12	3	10	15	14	8	14	11
	2%	4% c	2%	1%	2%	2%	2%	2%	2%	2%	2%	2%	5%	3%	3%
I send urgent or tracked mail by UK Mail	11	2	2	7	11	7	11	11	2	11	11	11	4	9	11
	2%	1%	1%	3%	2%	2%	2%	2%	1%	2%	2%	2%	2%	2%	2%
I send urgent or tracked mail by Interlink	11	4	4	3	10	5	10	10	4	10	11	10	2	10	10
	2%	2%	3%	1%	2%	1%	2%	2%	2%	2%	2%	2%	1%	2%	2%
I send urgent or tracked mail by City Link	10	6	2	2	10	7	10	10	4	6	10	10	3	9	6
	2%	2%	1%	1%	2%	2%	2%	2%	2%	1%	2%	2%	2%	2%	1%
I send urgent or tracked mail by a local company	8	8	*	-	8	7	8	7	3	8	8	8	3	8	8
	1%	3% c	1% *	0% -	1%	1%	1%	1%	2% 2%	2%	1% 1%	1% 1%	2% 2%	2% 2%	2% 2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

Significance Level: 95%

Unweighted total

Weighted total

I send urgent or tracked

mail by Parcel Force

Refused

None of these

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
654	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	265	133	253	630	502	637	527	221	537	654	619	212	555	485
Weighted total	261	125	238	597	448	605	500	176	512	627	581	175	515	446
I send urgent or tracked mail by Parcel Force	7	-	*	7	6	7	7	-	5	7	7	*	5	4
	1%	-%	*%	1%	1%	1%	1%	-%	1%	1%	1%	*%	1%	1%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of these	14	3	4	13	12	13	11	3	10	14	11	4	11	10
	2%	3%	2%	2%	3%	2%	2%	2%	2%	2%	2%	2%	2%	2%
Don't know	3	-	1	3	2	3	3	1	3	3	3	-	3	2
	1%	1%	1%	1%	*%	1%	1%	1%	1%	1%	1%	-%	1%	*%

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?
Base: All those using RM urgent or tracked mail services

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	654	127	17	518	647	614	650	586	653	-	495	649	251	95	88	470
Weighted total	627	117	19	499	616	586	621	551	625	-	456	622	213	91	82	454
Recorded delivery - Signed for	437	85	13	345	430	413	435	391	437	-	315	435	165	68	57	311
	70%	73%	68%	69%	70%	70%	70%	71%	70%	-%	69%	70%	78% ab	75%	70%	69%
Special delivery - Next Day (by 1pm)	334	60	6	270	328	318	331	288	334	-	254	330	134	42	51	240
	53%	51%	33%	54%	53%	54%	53%	52%	53%	-%	56%	53%	63% b	46%	63% a	53%
Royal Mail Tracked	177	25	5	147	177	158	177	158	176	-	142	177	77	24	27	126
	28%	22%	28%	29%	29%	27%	29%	29%	28%	-%	31%	29%	36% b	27%	33%	28%
Special delivery by 9am	146	25	2	119	144	142	146	132	146	-	117	144	60	17	27	102
	23%	21%	12%	24%	23%	24%	23%	24%	23%	-%	26%	23%	28%	19%	33% ac	22%
I send urgent or tracked mail by a carrier other than Royal Mail (PLEASE SPECIFY)	85	22	2	61	85	76	85	71	85	-	66	85	35	13	14	58
	14%	19% c	12%	12%	14%	13%	14%	13%	14%	-%	14%	14%	16%	15%	17%	13%
I send urgent or tracked mail by TNT	35	6	3	26	35	35	35	31	35	-	29	35	19	12	2	20
	6%	6%	16%	5%	6%	6%	6%	6%	6%	-%	6%	6%	9%	14% bc	2%	4%
I send urgent or tracked mail by UPS	25	6	4	17	25	23	25	23	25	-	24	25	18	10	2	13
	4%	5%	18%	3%	4%	4%	4%	4%	4%	-%	5%	4%	9% b	11% bc	2%	3%
I send urgent or tracked mail by Fedex	19	4	-	15	19	17	19	19	19	-	17	19	9	1	5	12
	3%	4%	-%	3%	3%	3%	3%	3%	3%	-%	4%	3%	4%	2%	7%	3%
I send urgent or tracked mail by DHL	15	4	-	12	14	15	15	13	15	-	12	15	11	1	1	13
	2%	3%	-%	2%	2%	3%	2%	2%	2%	-%	3%	2%	5% b	1%	2%	3%
I send urgent or tracked mail by UK Mail	11	4	-	7	11	11	11	11	11	-	9	11	4	7	-	4
	2%	3%	-%	1%	2%	2%	2%	2%	2%	-%	2%	2%	2%	7% bc	-%	1%
I send urgent or tracked mail by Interlink	11	4	-	7	11	10	11	7	11	-	7	10	4	3	*	8
	2%	3%	-%	1%	2%	2%	2%	1%	2%	-%	2%	2%	2%	3%	3%	2%
I send urgent or tracked mail by City Link	10	1	1	8	10	10	10	8	10	-	8	10	6	2	2	5
	2%	1%	7%	2%	2%	2%	2%	1%	2%	-%	2%	2%	3%	2%	3%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

Significance Level: 95%

Unweighted total

Weighted total

I send urgent or tracked

mail by a local company

I send urgent or tracked

mail by Parcel Force

Refused

None of these

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
654	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	127	17	518	647	614	650	586	653	-	495	649	251	95	88	470
Weighted total	627	117	499	616	586	621	551	625	-	456	622	213	91	82	454
I send urgent or tracked mail by a local company	8	2	-	8	8	8	8	8	-	6	8	5	*	-	8
	1%	2%	-%	1%	1%	1%	1%	1%	-%	1%	1%	2%	*%	-%	2%
I send urgent or tracked mail by Parcel Force	7	-	-	7	7	7	7	7	-	7	7	-	4	2	1
	1%	-%	-%	1%	1%	1%	1%	1%	-%	2%	1%	-%	5%	2%	*%
										c			c	c	
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of these	14	2	-	12	12	12	12	14	-	9	14	5	*	2	11
	2%	2%	-%	2%	2%	2%	2%	2%	-%	2%	2%	3%	*%	3%	3%
Don't know	3	-	-	3	3	3	3	3	-	3	3	2	-	2	1
	1%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	3%	*%
													c	c	

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?
Base: All those using RM urgent or tracked mail services

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	654	113	63	473	477	177	639	15	412	57	202	452	253	5
Weighted total	627	119	64	443	458	169	612	15	390	54	196	431	238	3
Recorded delivery - Signed for	437	78	44	315	324	113	425	11	281	33	140	296	145	2
	70%	65%	69%	71%	71%	67%	69%	79%	72%	61%	72%	69%	61%	91%
Special delivery - Next Day (by 1pm)	334	52	36	245	245	89	326	8	192	37	111	222	114	2
	53%	43%	57%	55% a	53%	53%	53%	52%	49%	69% a	57%	52%	48%	78%
Royal Mail Tracked	177	32	23	122	128	49	170	8	110	12	61	116	61	*
	28%	27%	36%	27%	28%	29%	28%	52%	28%	21%	31%	27%	26%	18%
Special delivery by 9am	146	27	12	108	101	45	145	1	89	16	48	98	51	1
	23%	22%	18%	24%	22%	27%	24%	7%	23%	29%	24%	23%	21%	25%
I send urgent or tracked mail by a carrier other than Royal Mail (PLEASE SPECIFY)	85	31	14	40	65	21	85	*	49	11	42	43	59	2
	14%	26% c	22% c	9%	14%	12%	14%	3%	12%	20%	22% b	10%	25%	66%
I send urgent or tracked mail by TNT	35	12	4	19	34	*	33	2	24	-	12	23	23	-
	6%	10% c	6%	4%	7% b	*%	5%	12%	6%	-%	6%	5%	10%	-%
I send urgent or tracked mail by UPS	25	7	2	16	18	7	25	-	13	*	12	13	19	*
	4%	6%	3%	4%	4%	4%	4%	-%	3%	1%	6%	3%	8%	18%
I send urgent or tracked mail by Fedex	19	5	4	10	16	4	19	-	14	5	10	9	17	-
	3%	4%	7%	2%	3%	2%	3%	-%	4%	10% a	5%	2%	7%	-%
I send urgent or tracked mail by DHL	15	8	*	7	12	3	15	-	12	2	5	10	7	-
	2%	7% bc	*%	2%	3%	2%	3%	-%	3%	3%	3%	2%	3%	-%
I send urgent or tracked mail by UK Mail	11	7	4	*	6	5	11	-	9	-	3	8	11	-
	2%	6% c	6% c	*%	1%	3%	2%	-%	2%	-%	2%	2%	4%	-%
I send urgent or tracked mail by Interlink	11	5	*	5	7	3	11	-	6	*	3	8	8	-
	2%	4% c	1%	1%	2%	2%	2%	-%	2%	*%	2%	2%	3%	-%
I send urgent or tracked mail by City Link	10	3	1	6	9	1	10	-	8	-	3	7	6	*
	2%	2%	1%	1%	2%	*%	2%	-%	2%	-%	1%	2%	2%	7%
I send urgent or tracked mail by a local company	8	1	-	7	8	*	8	-	4	-	2	6	5	-
	1%	1%	-%	1%	2%	*%	1%	-%	1%	-%	1%	1%	2%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 21 (continuation)

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

Significance Level: 95%

Unweighted total

Weighted total

I send urgent or tracked
mail by Parcel Force

Refused

None of these

Don't know

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	*b	a	b	a	b	a	*b
654	113	63	473	477	177	639	15	412	57	202	452	253	5
627	119	64	443	458	169	612	15	390	54	196	431	238	3
7	1	2	4	7	*	7	-	7	*	-	7	5	-
1%	1%	3%	1%	2%	*%	1%	-%	2%	*%	-%	2%	2%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
14	2	-	12	11	3	14	-	8	3	3	11	7	*
2%	2%	-%	3%	2%	2%	2%	-%	2%	6%	1%	3%	3%	4%
3	1	-	2	2	1	3	-	-	-	2	1	-	-
1%	1%	-%	*%	*%	1%	1%	-%	-%	-%	1%	*%	-%	-%

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Table 21 (continuation)

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QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?
Base: All those using RM urgent or tracked mail services

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	654	177	168	161	148
Weighted total	627	159	158	158	152
Recorded delivery - Signed for	437	120	102	105	109
	70%	76%	65%	66%	72%
		b			
Special delivery - Next Day (by 1pm)	334	88	74	83	89
	53%	55%	47%	52%	59%
		b			
Royal Mail Tracked	177	44	39	43	52
	28%	28%	24%	27%	34%
Special delivery by 9am	146	45	28	31	42
	23%	29%	18%	19%	28%
		b			b
I send urgent or tracked mail by a carrier other than Royal Mail (PLEASE SPECIFY)	85	22	25	24	14
	14%	14%	16%	15%	9%
I send urgent or tracked mail by TNT	35	9	7	7	12
	6%	5%	4%	4%	8%
I send urgent or tracked mail by UPS	25	10	4	6	6
	4%	6%	3%	4%	4%
I send urgent or tracked mail by Fedex	19	-	14	2	3
	3%	-%	9%	1%	2%
			acd		
I send urgent or tracked mail by DHL	15	1	4	4	7
	2%	*%	3%	2%	5%
					a
I send urgent or tracked mail by UK Mail	11	-	-	3	7
	2%	-%	-%	2%	5%
					ab
I send urgent or tracked mail by Interlink	11	5	4	1	1
	2%	3%	2%	*%	1%
I send urgent or tracked mail by City Link	10	4	4	*	*
	2%	3%	3%	*%	*%
I send urgent or tracked mail by a local company	8	3	2	3	-
	1%	2%	1%	2%	-%
I send urgent or tracked mail by Parcel Force	7	5	-	*	2
	1%	3%	-%	*%	1%
		bc			

Columns Tested: a,b,c,d

QV6c. Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?

Base: All those using RM urgent or tracked mail services

Significance Level: 95%

Unweighted total

Weighted total

Refused

None of these

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
654	177	168	161	148
627	159	158	158	152
-	-	-	-	-
-%	-%	-%	-%	-%
14	6	2	3	2
2%	4%	2%	2%	2%
3	-	-	2	1
1%	-%	-%	1%	1%

Table 22
QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?
Base: All those using RM standard delivery services

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1460	63	95	72	110	104	180	122	109	79	197	168	161	934
Weighted total	1455	90	157	103	107	104	243	174	193	81	79	65	58	1252
Standard Stamped Mail 1st Class	947 65%	61 68%	93 59%	74 72% l	75 70% l	69 66%	150 61%	111 64%	131 68%	53 66%	48 61%	48 74% bfjlm	34 58%	817 65%
Standard Stamped Mail 2nd Class	876 60%	64 71% f	95 61%	58 56%	65 61%	61 59%	134 55%	98 57%	122 63%	50 61%	53 68% fgm	39 60%	37 63%	747 60%
1st Class large letter stamps	696 48%	49 55% l	78 50% l	57 56% l	51 48% l	45 43%	118 49% l	91 52% l	85 44%	34 41%	38 47% l	29 44%	20 35%	609 49% l
2nd Class large letter stamps	486 33%	38 43% gk	54 35%	31 30%	40 37%	34 32%	84 35%	46 26%	63 33%	30 36%	28 35%	19 29%	20 35%	420 34%
Standard parcels	478 33%	29 33%	55 35%	35 34%	40 38% e	24 23%	87 36% e	57 33%	56 29%	32 39% e	26 32%	21 32%	16 27%	416 33% e
Franked / metered mail 2nd Class	226 16%	8 9%	28 18% ek	17 17% k	19 18% ek	8 8%	60 25% aeghjkm	23 13% k	24 13%	13 16% k	8 10%	4 6%	12 21% aejk	201 16% ejk
Franked / metered mail 1st Class	223 15%	6 6%	20 13%	17 17%	20 19% ak	10 9%	61 25% abeghjkm	25 14%	20 10%	18 22% aehjk	9 12%	5 8%	11 19% aehk	197 16% ak
NET: 1st class services	1193 82%	66 74%	115 74%	95 92% abeghjlm	95 89% abejl	81 78%	214 88% abejl	143 82%	155 80%	68 83%	61 77%	54 84% b	45 78%	1032 82% b
NET: 2nd class services	1076 74%	69 77%	118 75%	73 71%	83 78%	70 68%	186 76%	118 68%	144 75%	60 73%	62 78% gk	44 68%	48 83% cegkm	922 74%
NET: Standard stamped mail	1220 84%	84 94% dfilm	132 84%	87 85%	88 82%	91 88% f	184 76%	149 86% f	165 85%	67 82%	68 86% f	59 91% dfilm	46 79%	1047 84% f
NET: Large letter stamps	838 58%	62 69% hkl	98 62% l	65 63% l	61 57%	57 55%	138 57%	104 60%	102 53%	43 53%	47 60% l	33 50%	28 48%	730 58% l
NET: Franked / metered mail	267 18%	8 9%	31 20% k	18 17%	24 23% aejk	11 11%	69 28% aeghjkm	29 17%	29 15%	18 22% aek	10 13%	6 9%	14 24% aejk	236 19% aek
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 22 (continuation)

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

Base: All those using RM standard delivery services

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1460	1094	223	55	42	46	366	995	465	1348	112	909	288	120	143
Weighted total	1455	1395	35	10	7	7	60	1031	424	1399	56	998	268	100	88
Standard Stamped Mail															
1st Class	947	919	19	4	2	3	29	686	261	914	33	696	163	51	37
	65%	66%	53%	42%	30%	45%	48%	67%	62%	65%	59%	70%	61%	51%	42%
		bcd	d				d					bcd	d		
Standard Stamped Mail															
2nd Class	876	849	19	4	2	3	27	590	286	851	25	614	158	56	47
	60%	61%	53%	37%	31%	34%	46%	57%	67%	61%	45%	62%	59%	56%	54%
		bcd	cde						a	b					
1st Class large letter stamps	696	673	14	4	2	3	22	501	195	667	29	464	146	50	36
	48%	48%	39%	36%	25%	41%	37%	49%	46%	48%	52%	46%	54%	50%	40%
		bcd											ad		
2nd Class large letter stamps	486	467	12	3	2	2	19	330	156	473	14	322	91	42	31
	33%	34%	34%	32%	24%	28%	32%	32%	37%	34%	24%	32%	34%	42%	35%
										b				a	
Standard parcels	478	452	14	6	3	3	26	337	141	461	16	275	105	53	45
	33%	32%	38%	58%	42%	46%	43%	33%	33%	33%	30%	28%	39%	53%	51%
				abf			a						a	ab	ab
Franked / metered mail															
2nd Class	226	198	15	6	4	3	28	165	61	215	10	86	66	35	39
	16%	14%	41%	64%	56%	40%	46%	16%	14%	15%	19%	9%	25%	35%	44%
			a	abef	a	a	a						a	ab	ab
Franked / metered mail															
1st Class	223	194	15	6	5	4	29	171	52	210	13	87	70	31	35
	15%	14%	42%	57%	69%	51%	49%	17%	12%	15%	23%	9%	26%	31%	40%
			a	ab	abf	a	a	b			a		a	a	ab
NET: 1st class services	1193	1141	31	9	6	7	52	864	329	1147	46	806	230	88	70
	82%	82%	87%	90%	84%	92%	88%	84%	78%	82%	83%	81%	86%	88%	80%
							a	b							
NET: 2nd class services	1076	1026	30	9	5	5	50	737	339	1038	38	697	214	86	78
	74%	74%	85%	92%	74%	72%	83%	71%	80%	74%	68%	70%	80%	86%	89%
			ae	ade			a		a				a	a	ab
NET: Standard stamped mail	1220	1186	23	4	3	4	34	858	362	1179	41	900	197	66	57
	84%	85%	64%	45%	40%	50%	57%	83%	85%	84%	74%	90%	74%	66%	64%
		bcd	cd				d			b		bcd	d		
NET: Large letter stamps	838	812	17	4	2	3	26	590	248	807	31	568	168	58	44
	58%	58%	47%	40%	30%	44%	43%	57%	58%	58%	56%	57%	63%	58%	50%
		bcd	d										d		
NET: Franked / metered mail	267	234	17	7	5	4	33	200	67	253	14	100	84	40	43
	18%	17%	48%	69%	76%	57%	56%	19%	16%	18%	25%	10%	31%	41%	49%
			a	ab	abf	a	a						a	a	ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 22 (continuation)

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

Base: All those using RM standard delivery services

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1460	521	291	213	235	115	73	12	1243	82	48	49	38	281	102	190	194
Weighted total	1455	611	297	231	205	76	27	8	1284	65	35	41	29	262	108	172	198
Standard Stamped Mail 1st Class	947 65%	467 76% bcdef	198 67% def	143 62% def	98 48% f	30 39% f	8 31% f	3 41% f	876 68% bcde	30 46% e	14 39% e	20 48% e	8 26% e	143 55%	69 63%	96 56%	116 59%
Standard Stamped Mail 2nd Class	876 60%	364 59% ef	198 67% adef	159 69% adef	109 53% ef	30 40% ef	9 35% ef	7 88% ef	788 61% ce	38 58% e	15 42% e	24 57% e	11 39% e	157 60%	72 67%	113 66%	116 59%
1st Class large letter stamps	696 48%	291 48% ef	165 56% adef	112 48% ef	90 44% ef	28 37% ef	9 32% ef	2 20% ef	627 49% e	29 44% e	12 35% e	18 44% e	9 32% e	117 45%	60 56%	87 51%	90 45%
2nd Class large letter stamps	486 33%	183 30% a	107 36% a	87 38% a	76 37% a	21 27% a	7 27% a	5 65% a	419 33% ace	31 48% ace	10 29% ace	19 46% e	7 24% e	100 38%	49 45%	80 46% b	68 35% b
Standard parcels	478 33%	163 27% a	101 34% a	83 36% a	77 38% a	39 51% abcd	13 48% ab	2 21% ab	376 29% a	38 58% a	18 51% a	28 69% a	18 62% a	116 44%	41 38%	81 47%	76 38%
Franked / metered mail 2nd Class	226 16%	14 2% a	39 13% a	42 18% a	72 35% abc	39 51% abcd	16 61% abcd	3 36% abcd	160 12% a	18 27% a	15 42% a	15 35% a	18 64% abd	72 27%	22 20%	45 26%	48 24%
Franked / metered mail 1st Class	223 15%	18 3% a	36 12% a	44 19% ab	75 37% abc	33 43% abc	15 55% abcd	3 36% abcd	168 13% a	14 22% a	17 48% ab	14 35% a	10 34% a	66 25%	19 17%	39 23%	46 23%
NET: 1st class services	1193 82%	508 83% a	244 82% a	182 79% a	169 82% a	62 82% a	23 85% a	4 53% a	1062 83% be	47 73% e	30 86% e	35 84% e	19 66% e	211 81%	97 90% a	138 80%	170 86%
NET: 2nd class services	1076 74%	381 62% a	231 78% a	191 83% a	173 85% ab	67 88% ab	25 91% ab	8 100% ab	926 72% a	55 84% a	31 89% a	38 93% a	26 88% a	218 83%	94 87%	150 87%	162 82%
NET: Standard stamped mail	1220 84%	581 95% bcdef	262 88% cdef	188 81% def	135 66% ef	38 50% f	10 37% f	7 88% f	1116 87% bcde	46 70% ce	18 51% e	26 63% e	14 49% e	192 73%	88 81%	130 75%	150 76%
NET: Large letter stamps	838 58%	347 57% ef	191 64% adef	141 61% ef	111 54% f	34 44% f	10 35% f	5 65% f	746 58% e	42 64% e	18 51% e	20 49% e	12 41% e	149 57%	69 63%	114 66% b	104 53% b
NET: Franked / metered mail	267 16%	22 4% a	43 15% a	52 23% ab	86 42% abc	43 56% abcd	18 65% abcd	3 36% abcd	192 15% a	21 32% a	19 54% ab	17 41% a	19 65% abd	82 31%	24 22%	50 29%	56 28%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 22 (continuation)

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QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?
Base: All those using RM standard delivery services

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1460	683	280	492	1433	926	1451	716	430	1189	649	1460	288	1208	1107
Weighted total	1455	712	264	471	1423	872	1444	668	362	1192	608	1455	227	1193	1076
Standard Stamped Mail 1st Class	947 65%	485 68% c	174 66%	281 60%	930 65% e	567 65% e	943 65% e	417 63% e	202 56%	782 66% e	411 68% c	947 65% c	126 56%	947 79% b	617 57%
Standard Stamped Mail 2nd Class	876 60%	426 60%	168 64%	277 59%	863 61%	524 60%	869 60%	388 58%	214 59%	721 60%	365 60%	876 60%	125 55%	648 54%	876 81% a
1st Class large letter stamps	696 48%	305 43%	144 55% a	242 51% a	671 47%	562 64% acdef	692 48%	353 53% ac	171 47%	581 49%	363 60% bc	696 48%	111 49%	696 58% b	488 45%
2nd Class large letter stamps	486 33%	210 29%	98 37% a	174 37% a	475 33% acdef	386 44% acdef	482 33%	268 40% acdef	117 32%	410 34%	233 38% b	486 33%	96 42% b	388 33%	486 45% a
Standard parcels	478 33%	201 28%	98 37% a	175 37% a	469 33% acf	346 40% acf	472 33%	351 52% abcdef	163 45% acf	397 33%	265 44% b	478 33%	105 46% b	420 35%	378 35%
Franked / metered mail 2nd Class	226 16%	77 11%	41 16% a	108 23% ab	224 16%	194 22% acf	224 15%	150 23% acf	110 30% abcdf	198 17%	115 19%	226 16%	66 29% ab	189 16%	226 21% a
Franked / metered mail 1st Class	223 15%	72 10%	50 19% a	101 21% a	223 16% acf	198 23% acf	223 15%	141 21% acf	105 29% abcdf	198 17%	104 17%	223 15%	67 30% ab	223 19%	185 17%
NET: 1st class services	1193 82%	574 81%	226 85%	387 82%	1168 82% acdef	780 90% ac	1189 82%	570 85% ac	303 84% abcdf	998 84%	535 88% b	1193 82%	200 88% b	1193 100% b	815 76%
NET: 2nd class services	1076 74%	497 70%	205 78% a	369 78% a	1060 74% ac	689 79% ac	1067 74%	526 79% ac	306 85% abcdf	899 75%	468 77%	1076 74%	186 82% b	815 68% a	1076 100% a
NET: Standard stamped mail	1220 84%	629 88% bc	218 83%	365 78%	1200 84% bde	675 77% e	1213 84% bde	517 77% e	259 71%	985 83% bde	495 81% c	1220 84% c	155 68%	993 83%	890 83%
NET: Large letter stamps	838 58%	372 52%	171 65% a	290 62% a	811 57% acdef	660 76% acdef	832 58%	431 65% acf	200 55%	699 59%	417 69% bc	838 58%	136 60%	739 62%	630 59%
NET: Franked / metered mail	267 18%	89 12%	55 21% a	124 26% a	265 19% acf	228 26% acf	265 18%	174 26% acf	124 34% abcdf	235 20%	128 21%	267 18%	79 35% ab	230 19%	229 21%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 22 (continuation)

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QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?
Base: All those using RM standard delivery services

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1460	263	30	1178	1438	1271	1442	1133	1454	-	857	1436	384	145	225	1088
Weighted total	1455	247	29	1187	1426	1234	1430	1103	1446	-	824	1430	337	135	220	1097
Standard Stamped Mail 1st Class	947 65%	139 56%	23 77% a	794 67% a	927 65%	819 66%	930 65%	719 65%	943 65%	- -%	540 65%	932 65%	205 61%	79 59%	123 56%	742 68% ab
Standard Stamped Mail 2nd Class	876 60%	203 82% bc	17 57%	662 56%	857 60%	728 59%	859 60%	660 60%	872 60%	- -%	512 62%	859 60%	200 59%	71 52%	152 69% ac	653 60%
1st Class large letter stamps	696 48%	123 50%	13 46%	565 48%	686 48%	634 51%	689 48%	552 50%	696 48%	- -%	452 55% b	690 48%	165 49%	56 41%	94 43%	544 50%
2nd Class large letter stamps	486 33%	126 51% c	12 41%	354 30%	479 34%	428 35%	480 34%	384 35%	486 34%	- -%	297 36%	476 33%	130 39%	44 32%	69 31%	373 34%
Standard parcels	478 33%	99 40% c	16 55% c	371 31%	474 33%	438 36%	475 33%	428 39% ace	478 33%	- -%	328 40% b	475 33%	145 43% b	72 53% bc	66 30%	340 31%
Franked / metered mail 2nd Class	226 16%	43 17%	7 23%	180 15%	222 16%	210 17%	224 16%	184 17%	224 15%	- -%	129 16%	225 16%	76 23% ab	35 26% bc	36 17%	154 14%
Franked / metered mail 1st Class	223 15%	34 14%	9 31% ac	184 15%	222 16%	213 17%	223 16%	177 16%	223 15%	- -%	135 16%	223 16%	75 22% ab	31 23% c	42 19% c	151 14%
NET: 1st class services	1193 82%	188 76%	27 94% a	987 83% a	1171 82%	1048 85%	1176 82%	914 83%	1189 82%	- -%	697 85%	1178 82%	285 85%	108 80%	166 75%	917 84% b
NET: 2nd class services	1076 74%	242 98% bc	20 70%	820 69%	1053 74%	917 74%	1057 74%	826 75%	1070 74%	- -%	629 76%	1058 74%	265 79%	100 74%	182 83% ac	793 72%
NET: Standard stamped mail	1220 84%	208 84%	24 84%	995 84%	1195 84%	1012 82%	1198 84%	913 83%	1214 84%	- -%	688 83% c	1196 84% c	260 77%	102 75%	184 84%	932 85% a
NET: Large letter stamps	838 58%	159 64% c	18 61%	668 56%	828 58%	751 61%	831 58%	665 60%	838 58%	- -%	524 64% b	827 58%	207 61%	66 49%	116 53%	654 60% ab
NET: Franked / metered mail	267 18%	43 17%	9 31%	219 18%	263 18%	248 20%	265 19%	216 20%	265 18%	- -%	155 19%	266 19%	88 26% ab	41 31% bc	43 20%	182 17%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 22 (continuation)

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QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?
Base: All those using RM standard delivery services

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1460	162	95	1188	1010	450	1368	92	983	113	368	1092	340	8
Weighted total	1455	175	96	1174	996	459	1362	93	956	113	368	1087	328	7
Standard Stamped Mail 1st Class	947 65%	111 63%	53 55%	779 66% b	661 66%	286 62%	885 65%	62 67%	627 66%	80 70%	232 63%	715 66%	191 58%	5 75%
Standard Stamped Mail 2nd Class	876 60%	93 53%	54 57%	723 62% a	596 60%	280 61%	820 60%	56 61%	573 60%	78 69%	240 65% b	636 58%	209 64%	5 74%
1st Class large letter stamps	696 48%	73 42%	52 54%	567 48%	501 50% b	195 42%	659 48%	36 39%	435 46%	61 54%	194 53% b	502 46%	162 49%	5 69%
2nd Class large letter stamps	486 33%	65 37%	34 35%	386 33%	357 36% b	130 28%	467 34% b	19 21%	312 33%	41 36%	136 37%	351 32%	134 41%	3 42%
Standard parcels	478 33%	77 44% c	48 50% c	349 30%	345 35% b	133 29%	460 34% b	18 19%	314 33%	38 33%	138 37% b	340 31%	133 41%	4 59%
Franked / metered mail 2nd Class	226 16%	44 25% c	25 26% c	154 13%	168 17% b	57 13%	221 16% b	5 5%	150 16% b	7 6%	66 18%	159 15%	76 23%	2 25%
Franked / metered mail 1st Class	223 15%	42 24% c	18 18%	159 14%	167 17% b	57 12%	218 16% b	5 5%	154 16% b	9 8%	60 16%	163 15%	69 21%	* 3%
NET: 1st class services	1193 82%	151 86%	78 81%	958 82%	841 84% b	353 77%	1122 82%	71 77%	783 82%	94 83%	301 82%	893 82%	270 82%	5 78%
NET: 2nd class services	1076 74%	138 79%	76 80%	856 73%	738 74%	338 74%	1014 74%	61 66%	703 74%	87 76%	293 80% b	783 72%	273 83%	7 98%
NET: Standard stamped mail	1220 84%	130 74%	76 79%	1008 86% a	829 83%	391 85%	1136 83%	85 91% a	801 84%	107 94% a	308 84%	912 84%	256 78%	5 75%
NET: Large letter stamps	838 58%	98 56%	59 61%	678 58%	602 60% b	236 51%	798 59% b	40 43%	537 56%	71 62%	229 62% b	609 56%	199 61%	5 69%
NET: Franked / metered mail	267 18%	52 30% c	26 27% c	185 16%	194 19%	73 16%	262 19% b	5 5%	179 19% b	9 8%	75 20%	192 18%	87 26%	2 25%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 22 (continuation)

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QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?
Base: All those using RM standard delivery services

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1460	384	379	363	334
Weighted total	1455	369	376	367	342
Standard Stamped Mail					
1st Class	947	265	234	217	232
	65%	72%	62%	59%	68%
		bc			c
Standard Stamped Mail					
2nd Class	876	228	251	209	188
	60%	62%	67%	57%	55%
			cd		
1st Class large letter					
stamps	696	205	173	160	158
	48%	56%	46%	44%	46%
		bcd			
2nd Class large letter					
stamps	486	150	131	101	105
	33%	41%	35%	28%	31%
		cd	c		
Standard parcels	478	157	157	60	104
	33%	42%	42%	16%	30%
		cd	cd		c
Franked / metered mail					
2nd Class	226	66	70	52	38
	16%	18%	19%	14%	11%
		d	d		
Franked / metered mail					
1st Class	223	59	70	55	39
	15%	16%	19%	15%	11%
			d		
NET: 1st class services	1193	317	304	292	281
	82%	86%	81%	80%	82%
		c			
NET: 2nd class services	1076	282	307	259	228
	74%	76%	82%	71%	67%
		d	cd		
NET: Standard stamped					
mail	1220	315	312	296	297
	84%	85%	83%	81%	87%
					c
NET: Large letter stamps	838	244	207	193	193
	58%	66%	55%	53%	56%
		bcd			
NET: Franked / metered					
mail	267	73	86	64	45
	18%	20%	23%	17%	13%
		d	d		

Columns Tested: a,b,c,d

QV6e. Why does your organisation choose to send items by first class delivery?

Base: All those using 1st class services

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1208	49	73	64	98	85	158	101	89	66	156	145	124	783
Weighted total	1193	66	115	95	95	81	214	143	155	68	61	54	45	1032
Speed of delivery	973	52	90	77	78	64	184	117	124	52	52	43	41	838
	82%	78%	78%	81%	82%	78%	86%	82%	80%	77%	85%	78%	89%	81%
												beikm		
Reliability of service	173	7	16	13	10	19	31	26	19	10	8	8	6	151
	14%	11%	14%	13%	10%	23%	15%	18%	12%	14%	13%	14%	14%	15%
					djm									
Always have done / haven't thought to change	72	4	9	11	4	4	6	7	15	3	4	4	2	62
	6%	5%	8%	11%	5%	5%	3%	5%	10%	4%	6%	8%	4%	6%
				fi					f			f		
Better service for our customers / clients	52	6	2	2	*	4	13	6	6	4	4	2	3	43
	4%	9%	2%	2%	4%	5%	6%	4%	4%	6%	7%	3%	6%	4%
		d				d	d			d	d		d	
Image - not wanting to be seen as using a cheap service	39	5	4	-	*	-	13	9	-	5	1	1	*	37
	3%	8%	4%	-%	4%	-%	6%	6%	-%	8%	2%	1%	1%	4%
		cdehkl					cdehkl	cdehkl		cdehkl				
Next day delivery	25	4	2	2	4	*	2	4	2	4	*	*	1	24
	2%	5%	2%	2%	4%	4%	1%	3%	2%	6%	1%	1%	1%	2%
		ej								efjk				
Higher importance / important	21	*	1	2	4	-	7	2	-	1	2	2	*	18
	2%	4%	1%	2%	4%	-%	3%	1%	-%	2%	3%	3%	1%	2%
					h									
Little cost difference with second class stamps	18	*	2	-	1	4	4	2	-	3	*	2	*	16
	2%	4%	2%	-%	1%	5%	2%	1%	-%	4%	1%	4%	4%	2%
						hijlm				l				
Looks more professional / looks better to clients to send 1st class	8	-	-	6	-	-	2	-	-	-	-	*	-	7
	1%	-%	-%	6%	-%	-%	1%	-%	-%	-%	-%	4%	-%	1%
				bdefghi										
				jklm										
Cost - cheaper than the competition / courier	2	-	1	-	-	-	2	-	-	-	-	-	-	2
	1%	-%	1%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	1%
No particular reason	8	2	2	-	1	1	2	-	-	-	-	*	-	8
	1%	3%	2%	-%	1%	2%	1%	-%	-%	-%	-%	4%	-%	1%
		j												
Other	37	6	2	2	4	4	4	6	7	*	1	1	*	34
	3%	9%	2%	2%	4%	5%	2%	4%	5%	4%	2%	1%	1%	3%
		fijkl												
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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QV6e. Why does your organisation choose to send items by first class delivery?

Base: All those using 1st class services

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1208	890	189	49	37	43	318	851	357	1110	98	738	244	105	121
Weighted total	1193	1141	31	9	6	7	52	864	329	1147	46	806	230	88	70
Speed of delivery	973	931	25	7	5	5	42	698	276	941	32	645	194	67	67
	82%	82%	81%	82%	85%	73%	81%	81%	84%	82%	70%	80%	85%	76%	95%
										b					abc
Reliability of service	173	166	3	2	1	1	6	140	33	156	16	111	37	14	10
	14%	15%	11%	19%	15%	8%	12%	16%	10%	14%	35%	14%	16%	16%	14%
								b			a				
Always have done / haven't thought to change	72	70	1	*	*	1	2	58	14	68	4	58	8	4	3
	6%	6%	3%	4%	4%	11%	5%	7%	4%	6%	9%	7%	3%	5%	4%
						b						b			
Better service for our customers / clients	52	49	2	-	*	*	2	42	9	48	4	31	9	8	3
	4%	4%	6%	-%	4%	4%	5%	5%	3%	4%	8%	4%	4%	9%	5%
														ab	
Image - not wanting to be seen as using a cheap service	39	39	*	*	*	-	1	30	10	39	-	29	8	2	-
	3%	3%	%	4%	3%	-%	1%	3%	3%	3%	-%	4%	3%	3%	-%
		bf		b								d	d		
Next day delivery	25	24	*	*	*	*	1	13	12	25	*	17	6	2	*
	2%	2%	1%	4%	2%	2%	2%	2%	4%	2%	%	2%	2%	2%	%
								a							
Higher importance / important	21	19	1	1	-	*	2	10	11	21	*	18	1	2	*
	2%	2%	4%	6%	-%	6%	4%	1%	3%	2%	1%	2%	1%	2%	1%
				a		a	a		a						
Little cost difference with second class stamps	18	18	1	*	-	-	1	12	6	18	-	16	1	1	*
	2%	2%	2%	2%	-%	-%	1%	1%	2%	2%	-%	2%	1%	1%	%
Looks more professional / looks better to clients to send 1st class	8	7	*	*	*	-	*	7	*	8	-	7	*	-	-
	1%	1%	%	2%	2%	-%	1%	1%	%	1%	-%	1%	%	-%	-%
Cost - cheaper than the competition / courier	2	2	1	-	-	-	1	2	*	2	-	2	-	*	*
	%	%	2%	-%	-%	-%	1%	%	%	%	-%	%	-%	%	%
			a				a								
No particular reason	8	8	-	-	*	-	*	4	4	8	*	7	-	2	-
	1%	1%	-%	-%	2%	-%	%	1%	1%	1%	%	1%	-%	2%	-%
														b	
Other	37	34	2	*	*	1	2	29	7	36	1	22	7	5	2
	3%	3%	5%	1%	3%	8%	5%	3%	2%	3%	2%	3%	3%	6%	3%
						a									

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 23 (continuation) Page 254

QV6e. Why does your organisation choose to send items by first class delivery?

Base: All those using 1st class services

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	*e	a	b	a	b
Unweighted total	1208	434	239	175	198	93	60	9	1030	66	41	43	28	242	90	162	171
Weighted total	1193	508	244	182	169	62	23	4	1062	47	30	35	19	211	97	138	170
Speed of delivery	973 82%	399 78%	192 79%	153 84%	152 90%	54 86%	19 85%	4 97%	866 82%	35 75%	22 73%	31 91%	18 97%	167 79%	82 84%	114 82%	135 80%
Reliability of service	173 14%	77 15%	35 14%	23 13%	24 14%	10 16%	3 11%	* 3%	143 14%	13 28%	8 28%	6 16%	2 9%	43 20%	13 14%	32 23%	24 14%
Always have done / haven't thought to change	72 6%	43 8%	15 6%	8 4%	2 1%	2 4%	2 10%	- -%	68 6%	1 3%	1 2%	* 1%	2 12%	12 6%	3 3%	10 7%	5 3%
Better service for our customers / clients	52 4%	21 4%	8 3%	6 3%	13 8%	3 5%	1 3%	- -%	41 4%	3 6%	3 9%	4 13%	1 4%	10 5%	5 5%	6 4%	9 5%
Image - not wanting to be seen as using a cheap service	39 3%	19 4%	5 2%	6 3%	6 4%	4 6%	- -%	- -%	33 3%	4 9%	- -%	2 5%	- -%	4 2%	2 2%	2 2%	4 2%
Next day delivery	25 2%	7 1%	9 4%	6 3%	3 2%	- -%	* *%	- -%	23 2%	2 4%	- -%	* *%	- -%	8 4%	2 2%	6 5%	4 2%
Higher importance / important	21 2%	5 1%	8 3%	4 2%	3 2%	1 1%	* 1%	* 5%	21 2%	* 1%	- -%	- -%	- -%	5 2%	* *%	1 1%	4 2%
Little cost difference with second class stamps	18 2%	10 2%	1 *%	7 4%	1 *%	- -%	- -%	- -%	18 2%	- -%	- -%	* 1%	* 1%	5 3%	1 1%	3 2%	3 2%
Looks more professional / looks better to clients to send 1st class	8 1%	4 1%	2 1%	2 1%	* *%	- -%	- -%	- -%	8 1%	- -%	- -%	- -%	- -%	2 1%	- -%	2 1%	- -%
Cost - cheaper than the competition / courier	2 *%	2 *%	- -%	* *%	- -%	- -%	* 1%	- -%	2 *%	- -%	- -%	* 1%	- -%	* *%	* *%	- -%	1 *%
No particular reason	8 1%	4 1%	3 1%	- -%	- -%	2 3%	- -%	- -%	7 1%	- -%	- -%	2 5%	- -%	2 1%	- -%	- -%	2 1%
Other	37 3%	18 4%	7 3%	5 3%	2 1%	* 1%	4 15%	- -%	33 3%	* *%	2 6%	* *%	1 8%	7 3%	3 3%	5 4%	4 2%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 23 (continuation) Page 255

QV6e. Why does your organisation choose to send items by first class delivery?

Base: All those using 1st class services

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	1208	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1193	556	233	415	1186	830	1204	624	364	1000	580	1208	255	1208	857
Speed of delivery	973	463	187	316	948	655	969	471	265	819	442	973	177	973	687
	82%	81%	83%	82%	81%	84%	82%	83%	87%	82%	82%	82%	88%	82%	84%
									acdf				ab		
Reliability of service	173	71	34	66	171	120	173	101	61	139	93	173	25	173	103
	14%	12%	15%	17% a	15%	15%	15%	18% f	20% abcf	14%	17%	14%	13%	14%	13%
Always have done / haven't thought to change	72	46	4	22	72	36	72	24	7	56	22	72	8	72	27
	6%	8% b	2%	6% b	6% e	5%	6% e	4%	2%	6% e	4%	6%	4%	6% b	3%
Better service for our customers / clients	52	15	11	26	52	41	52	26	12	49	24	52	5	52	33
	4%	3%	5%	7% a	4%	5%	4%	5%	4%	5%	4%	4%	3%	4%	4%
Image - not wanting to be seen as using a cheap service	39	22	8	10	39	23	39	14	9	37	13	39	7	39	19
	3%	4%	4%	2%	3%	3%	3%	3%	3%	4%	2%	3%	3%	3%	2%
Next day delivery	25	12	6	7	25	18	25	13	4	21	18	25	7	25	21
	2%	2%	3%	2%	2%	2%	2%	2%	1%	2%	3%	2%	3%	2%	3%
Higher importance / important	21	8	2	11	21	14	21	9	8	19	8	21	2	21	21
	2%	1%	1%	3%	2%	2%	2%	2%	3%	2%	1%	2%	1%	2%	3%
Little cost difference with second class stamps	18	14	-	4	17	10	18	11	1	11	9	18	2	18	4
	2%	2% b	-%	1%	1%	1%	2%	2% e	1% *	1%	2%	2%	1%	2% b	1%
Looks more professional / looks better to clients to send 1st class	8	5	*	2	8	2	8	*	*	6	2	8	*	8	4
	1%	1%	1% *	1%	1%	1% *	1%	1% *	1% *	1%	1% *	1%	1% *	1%	1% *
Cost - cheaper than the competition / courier	2	*	2	*	2	2	2	2	1	2	2	2	2	2	2
	1%	1% *	1%	1% *	1% *	1% *	1% *	1% *	1% *	1% *	1% *	1% *	1% b	1% *	1% *
No particular reason	8	3	4	2	8	5	8	6	2	7	2	8	-	8	4
	1%	1% *	2%	1%	1%	1%	1%	1%	1%	1%	1% *	1%	1% -	1%	1% *
Other	37	22	7	8	37	19	37	19	4	30	15	37	5	37	21
	3%	4%	3%	2%	3%	2%	3%	3%	1%	3%	3%	3%	3%	3%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 23 (continuation)

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QV6e. Why does your organisation choose to send items by first class delivery?

Base: All those using 1st class services

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	1208	202	29	988	1192	1079	1196	945	1204	-	734	1193	323	119	168	919
Weighted total	1193	188	27	987	1171	1048	1176	914	1189	-	697	1178	285	108	166	917
Speed of delivery	973	165	24	793	953	860	956	744	969	-	577	958	246	77	145	749
	82%	88%	87%	80%	81%	82%	81%	81%	81%	-%	83%	81%	87%	71%	87%	82%
		c											b	a	a	
Reliability of service	173	22	8	143	173	154	173	142	172	-	97	172	33	17	21	134
	14%	12%	30%	15%	15%	15%	15%	15%	14%	-%	14%	15%	12%	15%	13%	15%
Always have done / haven't thought to change	72	1	1	70	72	58	72	54	72	-	41	71	16	10	4	58
	6%	*%	5%	7%	6%	6%	6%	6%	6%	-%	6%	6%	5%	9%	3%	6%
				a										b		
Better service for our customers / clients	52	1	6	45	48	46	50	40	52	-	30	50	12	10	12	29
	4%	1%	22%	5%	4%	4%	4%	4%	4%	-%	4%	4%	4%	10%	7%	3%
				a										c	c	
Image - not wanting to be seen as using a cheap service	39	4	2	34	39	34	39	29	39	-	23	39	10	8	6	26
	3%	2%	7%	3%	3%	3%	3%	3%	3%	-%	3%	3%	3%	7%	3%	3%
														c		
Next day delivery	25	4	-	21	25	25	25	24	25	-	23	25	11	2	4	19
	2%	2%	-%	2%	2%	2%	2%	3%	2%	-%	3%	2%	4%	2%	2%	2%
Higher importance / important	21	4	-	17	21	19	21	20	21	-	14	21	2	1	3	18
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	1%	1%	2%	2%
Little cost difference with second class stamps	18	1	-	17	18	16	18	14	18	-	11	18	4	3	-	15
	2%	1%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	1%	3%	-%	2%
														b		
Looks more professional / looks better to clients to send 1st class	8	*	-	7	8	6	8	8	8	-	4	8	2	*	-	7
	1%	*%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	*%	-%	1%
Cost - cheaper than the competition / courier	2	-	-	2	2	2	2	2	2	-	2	2	2	*	2	*
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	1%	*%	1%	*%
														c		
No particular reason	8	-	-	8	8	7	8	8	8	-	5	8	-	-	2	7
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	1%	1%
Other	37	4	1	33	37	31	37	26	37	-	14	37	7	10	5	21
	3%	2%	5%	3%	3%	3%	3%	3%	3%	-%	2%	3%	2%	9%	3%	2%
														bc		

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 23 (continuation)

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QV6e. Why does your organisation choose to send items by first class delivery?

Base: All those using 1st class services

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1208	139	80	977	853	355	1135	73	816	93	303	905	294	6
Weighted total	1193	151	78	958	841	353	1122	71	783	94	301	893	270	5
Speed of delivery	973	122	64	783	689	284	915	58	631	77	235	738	218	3
	82%	81%	82%	82%	82%	80%	82%	82%	81%	81%	78%	83%	81%	50%
Reliability of service	173	28	10	133	121	52	164	8	105	13	41	132	40	2
	14%	18%	13%	14%	14%	15%	15%	12%	13%	14%	13%	15%	15%	35%
Always have done / haven't thought to change	72	6	6	60	48	24	67	5	52	2	22	50	10	3
	6%	4%	8%	6%	6%	7%	6%	7%	7%	2%	7%	6%	4%	50%
Better service for our customers / clients	52	5	6	39	36	16	48	4	42	5	16	36	11	*
	4%	3%	8%	4%	4%	5%	4%	5%	5%	6%	5%	4%	4%	9%
Image - not wanting to be seen as using a cheap service	39	2	2	35	35	4	38	1	29	5	14	25	4	-
	3%	1%	3%	4%	4%	1%	3%	2%	4%	6%	5%	3%	2%	-%
Next day delivery	25	4	2	20	23	2	25	*	18	1	9	16	10	-
	2%	2%	2%	2%	3%	1%	2%	1%	2%	1%	3%	2%	4%	-%
Higher importance / important	21	3	-	18	18	3	21	*	17	2	6	15	5	-
	2%	2%	-%	2%	2%	1%	2%	1%	2%	2%	2%	2%	2%	-%
Little cost difference with second class stamps	18	4	-	15	9	9	17	1	13	1	8	11	5	*
	2%	2%	-%	2%	1%	3%	2%	2%	2%	1%	3%	1%	2%	9%
Looks more professional / looks better to clients to send 1st class	8	2	*	5	4	4	8	-	6	*	4	4	-	-
	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	-%
Cost - cheaper than the competition / courier	2	*	-	2	2	*	2	-	*	*	2	-	1	-
	1%	1%	-%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	-%
No particular reason	8	2	2	5	5	3	5	3	5	-	2	7	2	-
	1%	1%	2%	1%	1%	1%	1%	5%	1%	-%	1%	1%	1%	-%
Other	37	5	4	27	27	10	34	3	22	7	8	29	8	-
	3%	3%	6%	3%	3%	3%	3%	4%	3%	8%	3%	3%	3%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 23 (continuation)

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QV6e. Why does your organisation choose to send items by first class delivery?
Base: All those using 1st class services

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
		a	b	c	d
Significance Level: 95%					
Unweighted total	1208	334	313	290	271
Weighted total	1193	317	304	292	281
Speed of delivery	973	254	243	256	220
	82%	80%	80%	88%	78%
				abd	
Reliability of service	173	59	52	33	28
	14%	19%	17%	11%	10%
		cd	cd		
Always have done / haven't thought to change	72	14	19	19	20
	6%	5%	6%	7%	7%
Better service for our customers / clients	52	13	9	14	15
	4%	4%	3%	5%	5%
Image - not wanting to be seen as using a cheap service	39	19	9	4	8
	3%	6%	3%	1%	3%
		c			
Next day delivery	25	18	4	-	3
	2%	6%	1%	-%	1%
		bcd	c		
Higher importance / important	21	4	11	2	5
	2%	1%	3%	1%	2%
			c		
Little cost difference with second class stamps	18	3	6	6	4
	2%	1%	2%	2%	1%
Looks more professional / looks better to clients to send 1st class	8	2	2	2	2
	1%	1%	1%	1%	1%
Cost - cheaper than the competition / courier	2	-	-	2	-
	*%	-%	-%	1%	-%
No particular reason	8	2	5	1	-
	1%	1%	2%	*%	-%
			d		
Other	37	9	6	8	13
	3%	3%	2%	3%	5%

Columns Tested: a,b,c,d

Table 24

QV6f. Why does your organisation choose to send items by second class delivery?

Base: All those using 2nd class services

Significance Level: 95%

Unweighted total

Weighted total

No urgency

Cost

Very little difference
between 1st and 2nd
class delivery times

Always have done /
haven't thought to
change

Value for money for our
clients

Reliability of service

Other (PLEASE SPECIFY)

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1107	a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	47	75	50	88	74	137	87	85	58	154	116	136	701
Weighted total	69	118	73	83	70	186	118	144	60	62	44	48	922
No urgency	653	39	70	54	53	40	115	64	94	34	24	31	564
61%	56%	59%	75%	64%	57%	62%	54%	65%	57%	55%	55%	63%	61%
			egjk										
Cost	536	29	65	22	42	36	90	77	37	33	20	23	460
50%	42%	55%	30%	50%	51%	48%	65%	43%	62%	54%	45%	47%	50%
		c		c	c	c	acdfhklm		achk	c		c	c
Very little difference between 1st and 2nd class delivery times	25	7	3	*	1	3	4	-	2	3	*	1	21
2%	10%	2%	%	2%	4%	2%	-%	1%	2%	5%	1%	2%	2%
	cdfighklm									g			
Always have done / haven't thought to change	20	4	2	2	-	3	*	2	2	-	1	2	15
2%	5%	2%	3%	-%	4%	%	2%	2%	-%	2%	4%	3%	2%
	df				f						df		
Value for money for our clients	17	-	2	2	-	1	7	2	-	-	2	*	15
2%	-%	2%	2%	-%	2%	4%	2%	2%	-%	-%	3%	%	2%
Reliability of service	13	2	1	*	*	1	2	-	2	3	1	1	11
1%	3%	1%	%	%	2%	1%	1%	-%	2%	4%	1%	2%	1%
Other (PLEASE SPECIFY)	27	4	*	2	5	-	7	2	2	1	2	1	24
3%	5%	%	3%	6%	-%	4%	2%	2%	2%	3%	3%	1%	3%
				bel									

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Table 24 (continuation)

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QV6f. Why does your organisation choose to send items by second class delivery?

Base: All those using 2nd class services

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1107	810	186	50	30	31	297	733	374	1031	76	650	228	104	125
Weighted total	1076	1026	30	9	5	5	50	737	339	1038	38	697	214	86	78
No urgency	653	622	19	6	2	3	31	457	195	631	22	430	137	48	37
	61%	61%	65%	64%	44%	58%	62%	62%	58%	61%	58%	62%	64%	56%	47%
			d									d	d		
Cost	536	513	13	4	4	2	23	365	171	520	17	337	104	45	50
	50%	50%	44%	43%	70%	43%	46%	50%	51%	50%	44%	48%	49%	52%	64%
				abcef											ab
Very little difference between 1st and 2nd class delivery times	25	25	*	*	-	*	1	16	10	25	*	15	9	1	-
	2%	2%	4%	4%	-	6%	2%	2%	3%	2%	1%	2%	4%	1%	-
						b							d		
Always have done / haven't thought to change	20	18	1	*	-	*	2	12	8	19	*	15	2	1	2
	2%	2%	3%	3%	-	7%	3%	2%	2%	2%	1%	2%	1%	1%	3%
						a									
Value for money for our clients	17	17	*	*	*	-	1	15	2	17	1	8	4	1	5
	2%	2%	1%	2%	8%	-	2%	2%	1%	2%	1%	1%	2%	1%	6%
					abf										abc
Reliability of service	13	11	1	*	-	*	2	8	5	12	*	8	*	4	*
	1%	1%	3%	4%	-	9%	4%	1%	2%	1%	1%	1%	4%	4%	4%
			a			a	a							abd	
Other (PLEASE SPECIFY)	27	26	*	*	*	*	1	22	5	26	2	18	2	5	2
	3%	3%	2%	1%	4%	6%	2%	3%	2%	2%	5%	3%	1%	6%	3%
														b	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 24 (continuation) Page 261

QV6f. Why does your organisation choose to send items by second class delivery?

Base: All those using 2nd class services

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1107	330	232	173	191	102	67	12	921	65	46	44	31	232	85	159	159
Weighted total	1076	381	231	191	173	67	25	8	926	55	31	38	26	218	94	150	162
No urgency	653	238	147	124	103	29	12	1	580	27	15	26	5	126	54	85	95
	61%	62%	64%	65%	59%	43%	51%	8%	63%	49%	49%	68%	20%	58%	57%	57%	59%
		e	e	ef	e				be	e	e	be					
Cost	536	169	110	102	95	44	13	4	444	31	16	24	21	123	52	89	86
	50%	44%	48%	53%	55%	65%	55%	48%	48%	56%	51%	63%	83%	56%	56%	59%	53%
					a	abc						a	abc				
Very little difference between 1st and 2nd class delivery times	25	9	5	5	5	1	*	-	21	2	2	-	-	3	-	*	3
	2%	2%	2%	3%	3%	1%	2%	-%	2%	4%	7%	-%	-%	2%	-%	*%	2%
											a						
Always have done / haven't thought to change	20	9	3	3	*	2	2	*	16	*	*	*	3	4	2	4	2
	2%	2%	2%	1%	*%	2%	7%	4%	2%	*%	1%	1%	11%	2%	2%	2%	1%
							abcd						ab				
Value for money for our clients	17	6	2	3	4	1	1	2	13	2	*	2	*	3	5	3	5
	2%	1%	1%	1%	2%	1%	3%	23%	1%	4%	*%	6%	1%	1%	5%	2%	3%
												a					
Reliability of service	13	3	1	5	3	1	*	*	10	2	*	-	*	2	-	2	-
	1%	1%	1%	3%	1%	1%	1%	2%	1%	4%	*%	-%	1%	1%	-%	1%	-%
										a							
Other (PLEASE SPECIFY)	27	11	7	2	2	4	*	2	21	2	3	2	*	9	1	6	4
	3%	3%	3%	1%	1%	5%	2%	23%	2%	4%	9%	5%	1%	4%	1%	4%	2%
						cd					a						

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Ofcom: Business Postal Tracker

Table 24 (continuation)

Page 262

QV6f. Why does your organisation choose to send items by second class delivery?

Base: All those using 2nd class services

Significance Level: 95%

Unweighted total

Weighted total

No urgency

Cost

Very little difference
between 1st and 2nd
class delivery times

Always have done /
haven't thought to
change

Value for money for our
clients

Reliability of service

Other (PLEASE SPECIFY)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1107	489	226	389	1091	742	1100	566	368	917	509	1107	233	857	1107
1076	497	205	369	1060	689	1067	526	306	899	468	1076	186	815	1076
653	306	130	214	646	444	649	305	173	545	296	653	102	570	653
61%	62%	64%	58%	61%	64%	61%	58%	57%	61%	63%	61%	55%	70%	61%
					de					c			b	
536	247	91	195	527	322	531	281	160	447	222	536	100	331	536
50%	50%	45%	53%	50%	47%	50%	53%	52%	50%	47%	50%	54%	41%	50%
			b				b						a	
25	9	5	11	23	15	23	12	11	18	10	25	4	12	25
2%	2%	2%	3%	2%	2%	2%	2%	4%	2%	2%	2%	2%	2%	2%
20	10	4	6	20	12	20	6	5	18	6	20	6	17	20
2%	2%	2%	2%	2%	2%	2%	1%	2%	2%	1%	2%	3%	2%	2%
17	7	2	9	17	13	17	11	8	13	12	17	3	9	17
2%	1%	1%	2%	2%	2%	2%	2%	3%	1%	3%	2%	1%	1%	2%
13	4	2	7	13	9	13	5	5	13	2	13	*	4	13
1%	1%	1%	2%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
27	16	7	5	27	20	27	17	7	23	14	27	6	21	27
3%	3%	3%	1%	3%	3%	3%	3%	2%	3%	3%	3%	3%	3%	3%

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Table 24 (continuation)

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QV6f. Why does your organisation choose to send items by second class delivery?

Base: All those using 2nd class services

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	1107	258	22	837	1089	969	1093	871	1104	-	665	1089	309	107	192	807
Weighted total	1076	242	20	820	1053	917	1057	826	1070	-	629	1058	265	100	182	793
No urgency	653	119	15	522	638	577	643	515	651	-	397	643	170	45	95	512
	61%	49%	75%	64% a	61%	63%	61%	62%	61%	-%	63%	61%	64%	46%	52%	65% ab
Cost	536	155	9	376	526	436	527	410	534	-	319	527	127	61	108	367
	50%	64% c	45%	46%	50%	47%	50%	50%	50%	-%	51%	50%	48%	61% c	59% c	46%
Very little difference between 1st and 2nd class delivery times	25	4	-	22	23	23	23	21	23	-	15	25	7	3	4	18
	2%	1%	-%	3%	2%	3%	2%	3%	2%	-%	2%	2%	3%	3%	2%	2%
Always have done / haven't thought to change	20	2	1	18	20	17	20	13	20	-	12	20	6	4	2	14
	2%	1%	6%	2%	2%	2%	2%	2%	2%	-%	2%	2%	2%	4%	1%	2%
Value for money for our clients	17	6	-	12	17	16	17	14	17	-	12	17	2	5	2	10
	2%	2%	-%	1%	2%	2%	2%	2%	2%	-%	2%	2%	1%	5% bc	1%	1%
Reliability of service	13	3	2	8	13	13	13	11	13	-	8	13	3	2	2	9
	1%	1%	9%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	2%	1%	1%
Other (PLEASE SPECIFY)	27	2	-	26	26	23	26	21	27	-	17	26	6	6	5	16
	3%	1%	-%	3% a	2%	3%	2%	3%	3%	-%	3%	2%	2%	6% c	3%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 24 (continuation)

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QV6f. Why does your organisation choose to send items by second class delivery?

Base: All those using 2nd class services

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1107	128	80	889	772	335	1045	62	732	94	302	805	280	7
Weighted total	1076	138	76	856	738	338	1014	61	703	87	293	783	273	7
No urgency	653	94	47	506	436	217	615	37	451	43	164	488	154	4
	61%	69%	62%	59%	59%	64%	61%	61%	64%	49%	56%	62%	57%	55%
Cost	536	c							b					
	50%	63	44	427	385	151	509	28	337	51	169	367	155	2
		46%	57%	50%	52%	45%	50%	45%	48%	59%	58%	47%	57%	38%
					b					a	b			
Very little difference between 1st and 2nd class delivery times	25	-	1	24	17	9	24	2	7	6	9	17	3	-
	2%	-%	1%	3%	2%	3%	2%	3%	1%	7%	3%	2%	1%	-%
										a				
Always have done / haven't thought to change	20	2	4	14	14	6	19	*	14	*	5	15	4	*
	2%	1%	6%	2%	2%	2%	2%	1%	2%	3%	2%	2%	1%	7%
			c							3%				
Value for money for our clients	17	-	2	15	10	7	16	2	11	3	4	13	8	-
	2%	-%	3%	2%	1%	2%	2%	3%	2%	3%	1%	2%	3%	-%
			a											
Reliability of service	13	4	2	7	8	5	11	2	9	2	10	3	2	-
	1%	3%	3%	1%	1%	1%	1%	3%	1%	2%	3%	3%	1%	-%
		c									b			
Other (PLEASE SPECIFY)	27	6	1	21	21	7	24	3	18	3	9	19	10	-
	3%	4%	1%	2%	3%	2%	2%	5%	3%	3%	3%	2%	4%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 24 (continuation) Page 265

QV6f. Why does your organisation choose to send items by second class delivery?

Base: All those using 2nd class services

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
		a	b	c	d
Significance Level: 95%	1107	309	310	258	230
Unweighted total	1076	282	307	259	228
Weighted total					
No urgency	653	159	182	166	145
	61%	57%	59%	64%	64%
Cost	536	142	165	115	115
	50%	50%	54%	44%	50%
			c		
Very little difference between 1st and 2nd class delivery times	25	1	18	5	1
	2%	*%	6%	2%	1%
			acd		
Always have done / haven't thought to change	20	5	6	3	6
	2%	2%	2%	1%	3%
Value for money for our clients	17	12	2	2	1
	2%	4%	1%	1%	1%
		bcd			
Reliability of service	13	5	5	2	2
	1%	2%	1%	1%	1%
Other (PLEASE SPECIFY)	27	13	6	3	5
	3%	5%	2%	1%	2%
		c			

Columns Tested: a,b,c,d

QV7a. In the last 12 months, has your organisation:
Base: All Respondents using Royal Mail services

Significance Level: 95%
Unweighted total
Weighted total

Changed mail from higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)?

Both?

Or has not changed mail in the last 12 months?

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1566	a	b	c	d	e	f	g	h	i	j	k	l	m
1570	66	103	76	117	109	198	129	115	85	209	188	171	998
	95	172	110	114	109	274	185	204	87	84	73	62	1350
247	18	31	17	16	19	51	21	26	10	16	14	10	208
16%	19%	18%	15%	14%	17%	19%	11%	13%	11%	19%	19%	16%	15%
23	-	4	-	1	3	4	2	4	1	1	1	1	19
1%	-%	2%	-%	1%	3%	1%	1%	2%	1%	1%	1%	2%	1%
13	2	-	-	-	4	2	2	2	*	*	1	*	12
1%	2%	-%	-%	-%	4%	1%	1%	1%	-%	-%	1%	1%	1%
					djm								
1280	75	136	91	97	84	217	159	170	76	67	57	50	1105
82%	79%	79%	83%	85%	77%	79%	86%	83%	87%	80%	79%	81%	82%
6	-	*	2	-	-	-	2	2	-	*	-	-	6
-%	-%	-%	2%	-%	-%	-%	1%	1%	-%	-%	-%	-%	-%

QV7a. In the last 12 months, has your organisation:

Base: All Respondents using Royal Mail services

Significance Level: 95%

Unweighted total

Weighted total

Changed mail from higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)?

Both?

Or has not changed mail in the last 12 months?

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
247	235	7	3	1	1	12	163	84	237	10	167	42	16	23
16%	16%	18%	32% abdef	14%	12%	19%	15%	19%	16%	17%	15%	15%	16%	24% ab
23	22	1	-	-	-	1	13	9	19	3	15	*	5	2
1%	1%	2%	-%	-%	-%	1%	1%	2%	1%	5% a	1%	-%	5%	2% b
13	13	*	-	*	-	1	8	5	13	*	10	*	2	1
1%	1%	1%	-%	3%	-%	1%	1%	1%	1%	-%	1%	-%	2% b	1%
1280	1231	30	7	6	7	49	924	356	1236	44	894	238	79	68
82%	82% c	79%	68%	79%	86% c	78%	83% b	78%	82%	76%	82% d	85% d	77%	72%
6	6	*	-	*	*	1	6	*	6	*	6	-	-	1
-%	-%	1%	-%	5% ab	2%	1%	1%	-%	-%	1%	1%	-%	-%	1%

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Table 25 (continuation)

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QV7a. In the last 12 months, has your organisation:

Base: All Respondents using Royal Mail services

Significance Level: 95%

Unweighted total

Weighted total

Changed mail from higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)?

Both?

Or has not changed mail in the last 12 months?

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
1566	a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
1570	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
247	83	60	44	36	13	8	2	205	17	5	11	10	45	26	32	38
16%	12%	20%	19%	17%	17%	28%	21%	15%	23%	13%	27%	33%	16%	22%	18%	18%
		a	a	a		ad			a		a	ac				
23	10	3	4	3	2	1	-	19	2	-	2	-	7	1	4	4
1%	1%	1%	2%	1%	2%	2%	-%	1%	3%	-%	4%	-%	2%	1%	2%	2%
13	4	2	2	3	*	1	-	12	*	-	-	1	3	-	3	1
1%	1%	1%	1%	1%	1%	5%	-%	1%	1%	-%	-%	4%	1%	-%	2%	1%
						abce						a				
1280	599	238	184	171	63	18	8	1145	55	34	28	18	219	90	140	169
82%	85%	78%	79%	80%	80%	63%	78%	83%	75%	87%	69%	62%	80%	77%	78%	80%
	bcd	f	f	f	f			de		de						
6	4	2	*	-	-	*	*	6	-	-	*	*	*	*	-	*
1%	1%	1%	1%	-%	-%	2%	1%	1%	-%	-%	1%	1%	1%	1%	-%	1%

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Table 25 (continuation)

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QV7a. In the last 12 months, has your organisation:

Base: All Respondents using Royal Mail services

Significance Level: 95%

Unweighted total

Weighted total

Changed mail from higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)?

Both?

Or has not changed mail in the last 12 months?

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
1566	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1570	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
247	105	51	90	238	160	241	124	67	210	114	238	43	179	235
16%	13%	19% a	18% a	16%	18%	16%	18%	18%	17%	17%	16%	19%	15%	22% a
23	12	1	9	22	12	22	14	10	18	13	20	4	19	13
1%	2%	1%	2%	2%	1%	2%	2%	3%	1%	2%	1%	2%	2%	1%
13	4	2	7	13	11	13	7	5	12	9	9	3	9	7
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
1280	665	220	385	1175	704	1195	558	287	999	518	1181	179	981	816
82%	84% c	80%	78%	81%	79%	81% e	79%	77%	80%	79%	81%	78%	82% b	76%
6	6	*	*	6	2	6	2	6	6	*	6	*	6	5
1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
								abcdf						

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Table 25 (continuation)

Page 270

QV7a. In the last 12 months, has your organisation:

Base: All Respondents using Royal Mail services

Significance Level: 95%

Unweighted total

Weighted total

Changed mail from higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)?

Both?

Or has not changed mail in the last 12 months?

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1566	a 276	b 35	c 1269	a 1533	b 1345	c 1539	d 1197	e 1558	f 1	a 903	b 1534	c 399	a 154	b 238	c 1172
1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
247	247	-	-	243	218	245	200	245	-	157	245	56	22	53	171
16%	.95% bc	-%	-%	16%	17%	16%	17%	16%	-%	18%	16%	16%	16%	23% c	14%
23	-	23	-	21	22	23	17	23	-	13	23	4	5	2	15
1%	-%	63% ac	-%	1%	2%	1%	1%	1%	-%	1%	1%	1%	4% c	1%	1%
13	13	13	-	13	13	13	13	13	-	11	13	3	3	2	8
1%	5% c	37% ac	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	2%	1%	1%
1280	-	-	1280	1241	1058	1245	940	1270	2	694	1246	286	114	177	989
82%	-%	-%	100% ab	81%	80%	81%	80%	82%	100%	79%	81%	82%	79%	76%	83% b
6	-	-	6	6	4	6	2	6	-	*	6	*	*	*	4
1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%

Ofcom: Business Postal Tracker

Table 25 (continuation)

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QV7a. In the last 12 months, has your organisation:

Base: All Respondents using Royal Mail services

Significance Level: 95%
Unweighted total
Weighted total

Changed mail from higher
cost Royal Mail product
to a lower cost Royal
Mail product (such as
1st class mail to 2nd
class mail)?

Changed mail from a
lower cost Royal Mail
product to a higher cost
Royal Mail product (such
as 2nd class mail to 1st
class mail)?

Both?

Or has not changed mail
in the last 12 months?

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
247	33	15	199	172	76	232	15	143	26	82	166	64	1
16%	17%	15%	16%	16%	15%	16%	15%	14%	21% a	21% b	14%	18%	20%
23	5	2	16	19	3	20	2	12	-	7	16	6	-
1%	3%	2%	1%	2%	1%	1%	2%	1%	-%	2%	1%	2%	-%
13	1	2	10	13	1	13	*	9	-	4	10	2	-
1%	1%	2%	1%	1% b	*%	1%	*%	1%	-%	1%	1%	1%	-%
1280	148	84	1040	861	419	1197	83	871	94	303	978	276	5
82%	79%	81%	82%	81%	83%	82%	81%	84% b	77%	77%	83% a	79%	80%
6	*	*	4	3	4	5	2	2	2	*	6	*	-
*%	*%	*%	*%	*%	1%	*%	2% a	*%	2% a	*%	1%	*%	-%

Ofcom: Business Postal Tracker

Table 25 (continuation)

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QV7a. In the last 12 months, has your organisation:

Base: All Respondents using Royal Mail services

Significance Level: 95%

Unweighted total

Weighted total

Changed mail from higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)?

Both?

Or has not changed mail in the last 12 months?

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1566	398	404	389	375
1570	387	400	396	387
247	65	76	54	51
16%	17%	19%	14%	13%
		cd		
23	8	6	5	4
1%	2%	1%	1%	1%
13	5	4	1	4
1%	1%	1%	*%	1%
1280	309	312	336	324
82%	80%	78%	85%	84%
			b	b
6	*	2	-	4
*%	*%	*%	-%	1%
				c

QV7b. And why is this?

Base: All respondents who have changed Royal Mail services

Significance Level: 95%

Unweighted total

Weighted total

Price increases

Due to internal cost cutting

First class is not much quicker than second

Better quality of service

Cost implications

Changes in the type of mail sent

Became more aware of alternatives

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	*a	*b	*c	*d	*e	f	*g	*h	*i	j	k	l	m
283	13	20	12	19	21	38	20	20	11	39	38	32	174
270	18	35	17	17	22	55	23	30	11	17	14	12	227
222	14	27	16	15	17	47	15	24	8	14	13	9	186
82%	79%	76%	99%	91%	80%	86%	68%	81%	75%	84%	92%	78%	82%
39	6	4	*	4	3	11	4	3	-	2	2	1	34
15%	31%	12%	1%	23%	13%	20%	16%	10%	-%	14%	12%	9%	15%
14	*	-	2	1	-	4	2	2	-	1	1	*	11
5%	1%	-%	11%	8%	-%	7%	9%	8%	-%	9%	7%	4%	5%
12	-	-	-	-	1	-	5	2	1	2	-	*	10
5%	-%	-%	-%	-%	7%	-%	24%	7%	12%	9%	-%	4%	5%
9	-	2	-	-	1	2	2	*	*	*	1	*	8
3%	-%	6%	-%	-%	6%	4%	8%	1%	2%	1%	4%	4%	3%
5	2	-	-	-	1	-	-	-	-	*	*	1	3
2%	10%	-%	-%	-%	6%	-%	-%	-%	-%	3%	3%	8% m	1%
4	-	-	-	-	1	2	-	-	-	1	-	*	3
2%	-%	-%	-%	-%	6%	3%	-%	-%	-%	6%	-%	1%	1%
14	2	4	*	*	3	2	*	*	1	*	*	1	13
5%	10%	12%	1%	1%	13%	4%	1%	1%	12%	3%	1%	5%	6%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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Table 26 (continuation)

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QV7b. And why is this?

Base: All respondents who have changed Royal Mail services

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	283	209	44	17	7	6	74	187	96	261	22	165	56	29	33
Weighted total	270	257	7	3	1	1	12	176	93	257	13	181	42	21	25
Price increases	222	213	6	2	1	1	9	154	68	209	13	151	39	16	16
	82%	83%	77%	55%	75%	73%	71%	87%	73%	82%	96%	83%	92%	75%	65%
		f						b				d	d		
Due to internal cost cutting	39	37	1	1	*	*	2	20	19	39	*	24	6	4	5
	15%	15%	14%	21%	14%	12%	16%	11%	21%	15%	4%	13%	15%	17%	20%
									a						
First class is not much quicker than second	14	13	*	*	-	-	1	10	4	14	*	9	*	3	2
	5%	5%	4%	11%	-%	-%	5%	6%	4%	5%	1%	5%	*%	12%	10%
															b
Better quality of service	12	12	*	-	-	-	*	3	9	12	*	8	*	2	2
	5%	5%	4%	-%	-%	-%	2%	2%	10%	5%	1%	4%	1%	9%	7%
									a						
Cost implications	9	8	1	*	-	*	1	5	3	9	-	8	*	*	*
	3%	3%	7%	8%	-%	12%	7%	3%	4%	3%	-%	4%	1%	2%	1%
Changes in the type of mail sent	5	5	-	-	-	-	-	3	2	5	-	2	1	*	2
	2%	2%	-%	-%	-%	-%	-%	2%	2%	2%	-%	1%	2%	2%	7%
															a
Became more aware of alternatives	4	4	-	-	*	-	*	3	1	4	-	4	*	-	*
	2%	2%	-%	-%	11%	-%	1%	2%	1%	2%	-%	2%	1%	-%	*%
Other	14	13	1	*	-	*	1	7	7	14	*	12	*	*	2
	5%	5%	10%	15%	-%	15%	11%	4%	8%	5%	1%	7%	*%	1%	7%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 26 (continuation)

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QV7b. And why is this?

Base: All respondents who have changed Royal Mail services

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	a	b
Unweighted total	283	81	63	44	49	25	18	3	237	19	9	13	5	57	22	42	37
Weighted total	270	94	63	48	39	15	8	2	224	19	5	13	10	51	27	37	42
Price increases	222	76	54	43	32	12	3	2	186	16	5	7	8	37	26	27	35
	82%	81%	85%	89%	81%	81%	39%	89%	83%	85%	100%	54%	81%	72%	95%	74%	85%
Due to internal cost cutting	39	8	4	14	5	3	5	-	32	2	*	2	2	11	4	8	7
	15%	8%	6%	30% ab	14%	19%	57%	-	14%	13%	7%	17%	22%	22%	16%	23%	17%
First class is not much quicker than second	14	5	2	2	2	2	1	-	10	-	*	4	-	6	*	4	3
	5%	6%	3%	4%	6%	15%	7%	-%	5%	-%	3%	28%	-%	12%	2%	11%	6%
Better quality of service	12	2	5	*	5	-	*	-	9	*	-	2	2	2	-	2	-
	5%	2%	8%	*%	12% ac	-%	1%	-%	4%	1%	-%	14%	19%	4%	-%	6%	-%
Cost implications	9	2	2	4	-	*	-	*	9	*	-	-	-	3	-	3	-
	3%	2%	4%	8% d	-%	2%	-%	11%	4%	2%	-%	-%	-%	5%	-	7%	-%
Changes in the type of mail sent	5	1	-	-	2	2	-	-	3	*	-	2	-	4	*	2	2
	2%	1%	-%	-%	6%	12%	-%	-%	1%	3%	-%	14%	-%	7%	2%	6%	4%
Became more aware of alternatives	4	-	2	2	*	-	*	-	4	-	-	*	-	-	-	-	-
	2%	-%	3%	4%	1%	-%	1%	-%	2%	-%	-%	1%	-%	-%	-%	-%	-%
Other	14	11	3	*	*	*	*	-	14	*	-	*	-	1	1	1	2
	5%	11% cd	4%	*%	1%	1%	1%	-%	6%	1%	-%	1%	-%	2%	5%	2%	4%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-	-	-	-	-	-	-	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 26 (continuation)

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QV7b. And why is this?

Base: All respondents who have changed Royal Mail services

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	283	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	270	123	59	100	272	189	274	151	95	238	137	271	61	209	260
Price increases	222	117	53	99	260	172	264	137	76	228	126	258	48	197	248
	82%	96	47	78	215	144	218	117	55	191	105	217	36	158	214
		82%	90%	79%	83% e	84% e	83% e	85% e	72% e	84% e	83%	84%	75%	80%	86%
Due to internal cost cutting	39	14	7	18	38	28	38	18	15	35	13	38	8	29	38
	15%	12%	14%	18%	15%	16%	14%	13%	19%	15%	10%	15%	16%	15%	15%
First class is not much quicker than second	14	6	-	8	14	9	14	8	8	10	6	14	2	11	14
	5%	5%	-%	8% b	5%	5%	5%	6%	11% f	4%	5%	5%	5%	6%	5%
Better quality of service	12	5	2	6	12	6	12	4	5	8	4	12	4	11	7
	5%	4%	4%	6%	5%	3%	5%	3%	7%	3%	3%	5%	8%	6%	3%
Cost implications	9	2	*	6	9	3	9	1	5	7	3	9	1	8	8
	3%	2%	1%	6%	3%	2%	3%	1%	6% d	3%	2%	3%	2%	4%	3%
Changes in the type of mail sent	5	2	*	2	3	4	5	5	1	5	3	5	3	5	5
	2%	2%	1%	2%	1%	2%	2%	3%	1%	2%	2%	2%	7% b	2%	2%
Became more aware of alternatives	4	2	2	-	4	3	4	1	1	4	*	4	*	1	4
	2%	2%	4%	-%	2%	2%	2%	1%	1%	2%	1%	2%	1%	1%	2%
Other	14	9	2	3	12	8	12	5	4	9	5	8	3	8	6
	5%	8%	3%	3%	5%	5%	4%	4%	5%	4%	4%	3%	5%	4%	3%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

QV7b. And why is this?

Base: All respondents who have changed Royal Mail services

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	*c	a	b	c	d	e	*f	a	b	c	*a	b	c
Unweighted total	283	262	21	-	278	253	281	233	282	-	182	281	79	27	65	190
Weighted total	270	247	23	-	264	240	267	217	268	-	170	268	61	28	55	186
Price increases	222	217	5	-	218	196	220	178	220	-	137	220	47	18	47	157
	82%	88%	24%	-%	82%	82%	82%	82%	82%	-%	81%	82%	78%	66%	85%	84%
Due to internal cost cutting	39	39	*	-	39	31	39	34	39	-	30	39	13	7	6	26
	15%	16%	1%	-%	15%	13%	15%	16%	15%	-%	18%	15%	22%	25%	12%	14%
First class is not much quicker than second	14	11	3	-	14	14	14	10	14	-	7	14	2	2	-	12
	5%	5%	12%	-%	5%	6%	5%	5%	5%	-%	4%	5%	3%	8%	-%	6% b
Better quality of service	12	5	7	-	11	10	12	10	12	-	9	12	4	2	4	7
	5%	2%	31%	-%	4%	4%	5%	4%	5%	-%	6%	5%	6%	6%	6%	4%
Cost implications	9	6	3	-	9	7	9	4	9	-	6	9	2	*	2	7
	3%	3%	12%	-%	3%	3%	3%	2%	3%	-%	4%	3%	4%	*%	4%	4%
Changes in the type of mail sent	5	5	-	-	5	5	5	5	5	-	5	5	3	2	1	1
	2%	2%	-%	-%	2%	2%	2%	2%	2%	-%	3%	2%	5%	8%	3%	1%
Became more aware of alternatives	4	4	-	-	4	3	4	2	4	-	3	4	2	-	4	1
	2%	2%	-%	-%	2%	1%	2%	1%	2%	-%	2%	2%	3%	-%	6% c	*%
Other	14	8	6	-	13	14	14	14	14	-	9	14	1	2	2	10
	5%	3%	28%	-%	5%	6%	5%	6%	5%	-%	5%	5%	2%	6%	4%	6%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 26 (continuation)

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QV7b. And why is this?
Base: All respondents who have changed Royal Mail services

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	283	35	22	224	206	77	265	18	158	33	99	184	71	1
Weighted total	270	37	17	214	191	79	253	17	155	26	89	181	70	1
Price increases	222	31	11	180	148	74	207	15	130	22	69	153	54	1
	82%	82%	63%	84%	78%	93% a	82%	87%	84%	84%	78%	84%	78%	100%
Due to internal cost cutting	39	4	5	30	33	6	39	*	28	4	10	29	15	-
	15%	12%	28%	14%	17% b	8%	15%	3%	18%	15%	11%	16%	22%	-%
First class is not much quicker than second	14	4	*	10	13	1	14	-	7	2	8	6	6	-
	5%	10%	3%	4%	7%	1%	6%	-%	5%	7%	9%	3%	9%	-%
Better quality of service	12	-	2	10	11	1	11	1	6	2	4	8	2	-
	5%	-%	13%	5%	6%	1%	4%	6%	4%	7%	5%	5%	3%	-%
Cost implications	9	1	*	7	8	1	9	-	5	*	2	7	3	-
	3%	4%	1%	3%	4%	1%	3%	-%	3%	1%	2%	4%	4%	-%
Changes in the type of mail sent	5	2	-	3	3	2	5	-	2	-	3	2	4	-
	2%	5%	-%	2%	1%	3%	2%	-%	1%	-%	4%	1%	6%	-%
Became more aware of alternatives	4	-	1	4	4	*	4	-	*	4	2	2	-	-
	2%	-%	3%	2%	2%	1%	2%	-%	*%	14% a	2%	1%	-%	-%
Other	14	1	*	13	12	2	13	1	6	2	2	12	2	-
	5%	3%	1%	6%	6%	2%	5%	8%	4%	8%	2%	7%	3%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 26 (continuation)

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QV7b. And why is this?
Base: All respondents who have changed Royal Mail services

Significance Level: 95%

Unweighted total

Weighted total

Price increases

Due to internal cost cutting

First class is not much quicker than second

Better quality of service

Cost implications

Changes in the type of mail sent

Became more aware of alternatives

Other

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
283	89	81	55	58
270	73	82	59	55
222	54	72	49	47
82%	74%	87%	82%	86%
		a		
39	15	11	8	6
15%	21%	13%	13%	10%
14	-	8	1	5
5%	-%	10%	1%	9%
		ac		a
12	9	*	2	*
5%	12%	1%	4%	1%
	bd			
9	7	-	*	2
3%	9%	-%	1%	3%
	bc			
5	2	-	*	2
2%	3%	-%	1%	4%
4	2	*	1	*
2%	3%	1%	2%	1%
14	6	2	4	3
5%	8%	2%	6%	6%
-	-	-	-	-
-%	-%	-%	-%	-%

QV7ci. And why has your organisation 'changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)'?

Base: All respondents who have changed Royal Mail Services

Significance Level: 95%

Unweighted total

Weighted total

Better quality of

service

Changes in the type of

mail sent

Price increases

First class is not much

quicker than second

Became more aware of

alternatives

Cost implications

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
14	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m
Unweighted total	2	-	-	-	3	1	1	1	1	2	2	1	9
Weighted total	2	-	-	-	4	2	2	2	*	*	1	*	12
Better quality of service	8	2	-	-	1	-	2	2	-	-	1	-	7
	61%	100%	-%	-%	33%	-%	100%	100%	-%	-%	100%	-%	61%
Changes in the type of mail sent	2	-	-	-	-	2	-	-	-	-	-	*	2
	17%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	15%
Price increases	*	-	-	-	-	-	-	-	*	-	-	-	*
	1%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	2%
First class is not much quicker than second	*	-	-	-	-	-	-	-	-	*	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	50%	-%	-%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Cost implications	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	-	-	-	3	-	-	-	-	*	*	-	3
	24%	-%	-%	-%	67%	-%	-%	-%	-%	50%	50%	-%	22%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV7ci. And why has your organisation 'changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)'?

Base: All respondents who have changed Royal Mail Services

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
		^a	^b	^c	^d	^e	^f	^a	^b	^a	^b	^a	^b	^c	^d
Significance Level: 95%	14	10	3	-	1	-	4	9	5	13	1	10	1	1	2
Unweighted total	13	13	*	-	*	-	1	8	5	13	*	10	*	2	1
Weighted total															
Better quality of service	8	8	*	-	-	-	*	3	5	8	-	7	-	-	1
	61%	62%	39%	-%	-%	-%	26%	38%	98%	61%	-%	68%	-%	-%	92%
Changes in the type of mail sent	2	2	-	-	-	-	-	2	-	2	-	*	-	2	-
	17%	18%	-%	-%	-%	-%	-%	27%	-%	17%	-%	5%	-%	100%	-%
Price increases	*	-	-	-	*	-	*	*	-	*	-	-	*	-	-
	1%	-%	-%	-%	100%	-%	34%	2%	-%	1%	-%	-%	100%	-%	-%
First class is not much quicker than second	*	-	*	-	-	-	*	-	*	*	-	-	-	-	*
	1%	-%	30%	-%	-%	-%	20%	-%	2%	1%	-%	-%	-%	-%	8%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Cost implications	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	3	*	-	-	-	*	3	*	3	*	3	-	-	-
	24%	24%	30%	-%	-%	-%	20%	32%	10%	23%	100%	32%	-%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

Ofcom: Business Postal Tracker

Table 27 (continuation)

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QV7ci. And why has your organisation 'changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)'?

Base: All respondents who have changed Royal Mail Services

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	14	5	2	1	2	2	-	12	1	-	-	1	5	-	3	2
Weighted total	13	4	2	2	3	*	1	12	*	-	-	1	3	-	3	1
Better quality of service	8	3	2	2	-	*	1	7	-	-	-	1	2	-	1	*
	61%	69%	79%	100%	-%	43%	92%	57%	-%	-%	-%	100%	53%	-%	48%	72%
Changes in the type of mail sent	2	-	*	-	2	-	-	2	-	-	-	-	-	-	-	-
	17%	-%	21%	-%	58%	-%	-%	19%	-%	-%	-%	-%	-%	-%	-%	-%
Price increases	*	-	-	-	-	*	-	-	*	-	-	-	*	-	-	*
	1%	-%	-%	-%	-%	57%	-%	-%	100%	-%	-%	-%	6%	-%	-%	28%
First class is not much quicker than second	*	-	-	-	-	-	*	*	-	-	-	-	*	-	*	-
	1%	-%	-%	-%	-%	-%	8%	1%	-%	-%	-%	-%	3%	-%	4%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Cost implications	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	2	-	-	1	-	-	3	-	-	-	-	2	-	1	*
	24%	42%	-%	-%	42%	-%	-%	27%	-%	-%	-%	-%	53%	-%	48%	72%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Table 27 (continuation)

QV7ci. And why has your organisation 'changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)'?

Base: All respondents who have changed Royal Mail Services

Significance Level: 95%

Unweighted total

Weighted total

Better quality of service

Changes in the type of mail sent

Price increases

First class is not much quicker than second

Became more aware of alternatives

Cost implications

Other

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
14	5	1	8	14	11	14	8	6	12	8	11	4	11	10
13	4	2	7	13	11	13	7	5	12	9	9	3	9	7
8	2	2	4	8	8	8	4	3	8	6	6	1	6	4
61%	54%	100%	55%	61%	66%	61%	52%	61%	68%	65%	61%	41%	61%	52%
2	*	-	2	2	2	2	2	2	2	2	*	*	*	*
17%	11%	-%	24%	17%	20%	17%	25%	34%	19%	20%	5%	15%	5%	7%
*	*	-	-	*	*	*	*	*	*	-	*	-	*	*
1%	4%	-%	-%	1%	2%	1%	3%	4%	2%	-%	2%	-%	2%	3%
*	-	-	*	*	*	*	*	*	*	*	*	*	*	*
1%	-%	-%	1%	1%	1%	1%	2%	2%	1%	1%	1%	3%	1%	2%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-	-%	-%	-%	-%
3	1	-	2	3	2	3	2	-	2	1	3	1	3	3
24%	31%	-%	26%	24%	15%	24%	25%	-%	15%	14%	35%	41%	35%	44%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV7ci. And why has your organisation 'changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)'?

Base: All respondents who have changed Royal Mail Services

Significance Level: 95%

Unweighted total

Weighted total

Better quality of service

Changes in the type of mail sent

Price increases

First class is not much quicker than second

Became more aware of alternatives

Cost implications

Other

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
14	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
14	14	14	-	14	14	14	14	14	-	10	14	5	3	3	8
13	13	13	-	13	13	13	13	13	-	11	13	3	3	2	8
8	8	8	-	8	8	8	8	8	-	5	8	1	2	*	6
61%	61%	61%	-%	61%	61%	61%	61%	61%	-%	51%	61%	43%	58%	7%	74%
2	2	2	-	2	2	2	2	2	-	2	2	+	-	+	2
17%	17%	17%	-%	17%	17%	17%	17%	17%	-%	22%	17%	14%	-%	25%	21%
*	*	*	-	*	*	*	*	*	-	*	*	-	-	-	*
1%	1%	1%	-%	1%	1%	1%	1%	1%	-%	2%	1%	-%	-%	-%	2%
*	*	*	-	*	*	*	*	*	-	*	*	*	-	-	*
1%	1%	1%	-%	1%	1%	1%	1%	1%	-%	1%	1%	3%	-%	-%	1%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
3	3	3	-	3	3	3	3	3	-	3	3	1	1	1	1
24%	24%	24%	-%	24%	24%	24%	24%	24%	-%	25%	24%	39%	42%	68%	7%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV7ci. And why has your organisation 'changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)'?

Base: All respondents who have changed Royal Mail Services

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	*c	*a	*b	*a	*b	*a	*b	*a	*b	*a	*b
Unweighted total	14	1	1	12	12	2	13	1	10	-	3	11	4	-
Weighted total	13	1	2	10	13	1	13	*	9	-	4	10	2	-
Better quality of service	8	1	2	5	8	*	8	*	5	-	3	5	*	-
	61%	100%	100%	49%	60%	72%	60%	100%	61%	-%	87%	51%	23%	-%
Changes in the type of mail sent	2	-	-	2	2	-	2	-	*	-	*	2	-	-
	17%	-%	-%	22%	18%	-%	17%	-%	5%	-%	13%	18%	-%	-%
Price increases	*	-	-	+	-	+	+	-	+	-	-	+	+	-
	1%	-%	-%	2%	-%	28%	1%	-%	2%	-%	-%	2%	9%	-%
First class is not much quicker than second	*	-	-	+	+	-	+	-	+	-	-	+	+	-
	1%	-%	-%	1%	1%	-%	1%	-%	1%	-%	-%	1%	5%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Cost implications	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	-	-	3	3	+	3	-	3	-	-	3	2	-
	24%	-%	-%	31%	21%	72%	24%	-%	36%	-%	-%	32%	86%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

QV7ci. And why has your organisation 'changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product (such as 2nd class mail to 1st class mail)'?

Base: All respondents who have changed Royal Mail Services

Significance Level: 95%

Unweighted total

Weighted total

Better quality of service

Changes in the type of mail sent

Price increases

First class is not much quicker than second

Became more aware of alternatives

Cost implications

Other

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	*a	*b	*c	*d
14	4	5	2	3
13	5	4	1	4
	8	3	3	2
61%	50%	92%	-%	56%
	2	-	*	2
17%	-%	-%	81%	44%
	*	*	-	-
1%	-%	5%	-%	-%
	*	*	-	-
1%	-%	3%	-%	-%
	-	-	-	-
-%	-%	-%	-%	-%
	-	-	-	-
-%	-%	-%	-%	-%
	3	-	*	-
24%	59%	-%	19%	-%
	-	-	-	-
-%	-%	-%	-%	-%

QV7cii. And why has your organisation 'changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Base: All respondents who have changed Royal Mail Services

Significance Level: 95%

Unweighted total

Weighted total

Due to internal cost cutting

Cost implications

Price increases

First class is not much quicker than second

Changes in the type of mail sent

Better quality of service

Became more aware of alternatives

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
14	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m
2	2	-	-	-	3	1	1	1	1	2	2	1	9
13	2	-	-	-	4	2	2	2	*	*	1	*	12
4	2	-	-	-	3	-	-	-	-	-	-	-	4
33%	93%	-%	-%	-%	67%	-%	-%	-%	-%	-%	-%	-%	37%
2	-	-	-	-	-	-	2	-	-	*	*	-	2
18%	-%	-%	-%	-%	-%	-%	100%	-%	-%	50%	50%	-%	15%
2	*	-	-	-	-	-	2	-	*	*	-	-	2
18%	7%	-%	-%	-%	-%	-%	-%	100%	-%	50%	-%	-%	19%
2	-	-	-	-	-	-	2	-	-	-	*	-	2
17%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	50%	-%	15%
1	*	-	-	-	-	-	-	-	*	-	-	*	*
6%	7%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	100%	3%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
3	-	-	-	-	1	2	-	-	-	*	-	-	3
24%	-%	-%	-%	-%	33%	100%	-%	-%	-%	50%	-%	-%	26%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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QV7cii. And why has your organisation 'changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Base: All respondents who have changed Royal Mail Services

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
		*a	*b	*c	*d	*e	*f	*a	*b	*a	*b	*a	*b	*c	*d
Significance Level: 95%	14	10	3	-	1	-	4	9	5	13	1	10	1	1	2
Unweighted total	13	13	*	-	*	-	1	8	5	13	*	10	*	2	1
Weighted total															
Due to internal cost cutting	4	4	-	-	-	-	-	3	2	4	-	3	-	-	1
	33%	34%	-%	-%	-%	-%	-%	31%	36%	33%	-%	31%	-%	-%	92%
Cost implications	2	2	*	-	-	-	*	2	*	2	*	2	-	-	-
	18%	18%	30%	-%	-%	-%	20%	23%	10%	17%	100%	24%	-%	-%	-%
Price increases	2	2	*	-	-	-	*	*	2	2	-	2	-	-	*
	18%	17%	70%	-%	-%	-%	46%	2%	45%	18%	-%	23%	-%	-%	8%
First class is not much quicker than second	2	2	-	-	-	-	-	2	*	2	-	2	-	-	-
	17%	18%	-%	-%	-%	-%	-%	21%	10%	17%	-%	23%	-%	-%	-%
Changes in the type of mail sent	1	*	*	-	*	-	*	1	-	1	-	1	*	-	-
	6%	4%	39%	-%	100%	-%	60%	10%	-%	6%	-%	6%	100%	-%	-%
Better quality of service	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	3	*	-	-	-	*	3	-	3	*	1	-	2	-
	24%	24%	30%	-%	-%	-%	20%	38%	-%	23%	100%	14%	-%	100%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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QV7cii. And why has your organisation 'changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Base: All respondents who have changed Royal Mail Services

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*a	*b	*c	*d	*e	*a	*b	*a	*b
Unweighted total	14	5	2	1	2	2	2	-	12	1	-	-	1	5	-	3	2
Weighted total	13	4	2	2	3	*	1	-	12	*	-	-	1	3	-	3	1
Due to internal cost cutting	4	-	-	2	1	-	1	-	3	-	-	-	1	3	-	3	-
	33%	-%	-%	100%	42%	-%	92%	-%	26%	-%	-%	-%	100%	77%	-%	96%	-%
Cost implications	2	1	2	-	-	-	-	-	2	-	-	-	-	*	-	-	*
	18%	13%	79%	-%	-%	-%	-%	-%	20%	-%	-%	-%	-%	14%	-%	-%	72%
Price increases	2	2	-	-	-	*	*	-	2	-	-	-	-	*	-	*	-
	18%	47%	-%	-%	-%	43%	8%	-%	20%	-%	-%	-%	-%	3%	-%	4%	-%
First class is not much quicker than second	2	*	2	-	-	-	-	-	2	-	-	-	-	-	-	-	-
	17%	11%	79%	-%	-%	-%	-%	-%	19%	-%	-%	-%	-%	-%	-%	-%	-%
Changes in the type of mail sent	1	-	*	-	-	*	-	-	1	*	-	-	-	*	-	-	*
	6%	-%	21%	-%	-%	100%	-%	-%	5%	100%	-%	-%	-%	6%	-%	-%	28%
Better quality of service	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	1	-	-	2	-	-	-	3	-	-	-	-	-	-	-	-
	24%	31%	-%	-%	58%	-%	-%	-%	27%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

QV7cii. And why has your organisation 'changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Base: All respondents who have changed Royal Mail Services

Significance Level: 95%

Unweighted total

Weighted total

Due to internal cost cutting

Cost implications

Price increases

First class is not much quicker than second

Changes in the type of mail sent

Better quality of service

Became more aware of alternatives

Other

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
14	5	1	8	14	11	14	8	6	12	8	11	4	11	10
13	4	2	7	13	11	13	7	5	12	9	9	3	9	7
4	1	2	1	4	3	4	1	3	4	1	4	3	4	4
33%	31%	100%	18%	33%	27%	33%	18%	58%	37%	14%	49%	81%	49%	61%
2	2	-	1	2	2	2	2	-	2	2	2	-	2	1
18%	42%	-%	8%	18%	20%	18%	32%	-%	19%	20%	27%	-%	27%	8%
2	-	-	2	2	2	2	*	*	2	2	*	*	*	*
18%	-%	-%	32%	18%	21%	18%	4%	5%	20%	26%	3%	3%	3%	3%
2	2	-	-	2	2	2	2	-	2	2	2	-	2	-
17%	54%	-%	-%	17%	16%	17%	25%	-%	19%	25%	20%	-%	20%	-%
1	1	-	*	1	1	1	*	*	1	*	1	*	1	1
6%	16%	-%	2%	6%	7%	6%	5%	6%	7%	2%	9%	15%	9%	11%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
3	-	-	3	3	3	3	3	2	2	3	1	-	1	1
24%	-%	-%	44%	24%	27%	24%	44%	34%	15%	34%	16%	-%	16%	20%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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QV7cii. And why has your organisation 'changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)'?

Base: All respondents who have changed Royal Mail Services

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%																
Unweighted total	14	14	14	-	14	14	14	14	14	-	10	14	5	3	3	8
Weighted total	13	13	13	-	13	13	13	13	13	-	11	13	3	3	2	8
Due to internal cost cutting	4	4	4	-	4	4	4	4	4	-	4	4	3	1	1	2
	33%	33%	33%	-%	33%	33%	33%	33%	33%	-%	42%	33%	78%	42%	68%	21%
Cost implications	2	2	2	-	2	2	2	2	2	-	2	2	-	-	-	2
	18%	18%	18%	-%	18%	18%	18%	18%	18%	-%	17%	18%	-%	-%	-%	28%
Price increases	2	2	2	-	2	2	2	2	2	-	*	2	*	-	*	2
	18%	18%	18%	-%	18%	18%	18%	18%	18%	-%	1%	18%	8%	-%	7%	27%
First class is not much quicker than second	2	2	2	-	2	2	2	2	2	-	2	2	-	*	-	2
	17%	17%	17%	-%	17%	17%	17%	17%	17%	-%	22%	17%	-%	16%	-%	21%
Changes in the type of mail sent	1	1	1	-	1	1	1	1	1	-	1	1	1	-	1	*
	6%	6%	6%	-%	6%	6%	6%	6%	6%	-%	6%	6%	19%	-%	32%	2%
Better quality of service	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	3	3	-	3	3	3	3	3	-	3	3	-	1	-	2
	24%	24%	24%	-%	24%	24%	24%	24%	24%	-%	29%	24%	-%	42%	-%	23%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 28 (continuation)

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QV7cii. And why has your organisation 'changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)?

Base: All respondents who have changed Royal Mail Services

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	*c	*a	*b	*a	*b	*a	*b	*a	*b	*a	*b
Unweighted total	14	1	1	12	12	2	13	1	10	-	3	11	4	-
Weighted total	13	1	2	10	13	1	13	*	9	-	4	10	2	-
Due to internal cost cutting	4	1	2	1	4	-	4	-	4	-	3	1	1	-
	33%	100%	100%	13%	35%	-%	33%	-%	50%	-%	87%	13%	62%	-%
Cost implications	2	-	-	2	2	*	2	-	2	-	-	2	*	-
	18%	-%	-%	23%	15%	72%	18%	-%	27%	-%	-%	24%	23%	-%
Price increases	2	-	-	2	2	-	2	*	*	-	-	2	*	-
	18%	-%	-%	23%	19%	-%	17%	100%	1%	-%	-%	24%	5%	-%
First class is not much quicker than second	2	-	-	2	2	-	2	-	2	-	-	2	-	-
	17%	-%	-%	22%	18%	-%	17%	-%	20%	-%	-%	23%	-%	-%
Changes in the type of mail sent	1	-	-	1	1	*	1	*	1	-	*	*	*	-
	6%	-%	-%	8%	5%	28%	5%	100%	8%	-%	13%	3%	9%	-%
Better quality of service	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	-	-	3	3	-	3	-	1	-	-	3	-	-
	24%	-%	-%	31%	25%	-%	24%	-%	16%	-%	-%	33%	-%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

QV7cii. And why has your organisation 'changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product (such as 1st class mail to 2nd class mail)'?

Base: All respondents who have changed Royal Mail Services

Significance Level: 95%

Unweighted total

Weighted total

Due to internal cost

cutting

Cost implications

Price increases

First class is not much

quicker than second

Changes in the type of

mail sent

Better quality of

service

Became more aware of

alternatives

Other

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	*a	*b	*c	*d
14	4	5	2	3
13	5	4	1	4
4	1	3	-	-
33%	25%	88%	-%	-%
2	*	-	*	2
18%	9%	-%	19%	44%
2	2	*	-	-
18%	41%	7%	-%	-%
2	-	-	-	2
17%	-%	-%	-%	56%
1	-	*	*	-
6%	-%	9%	81%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
3	1	-	*	2
24%	25%	-%	19%	44%
-	-	-	-	-
-%	-%	-%	-%	-%

Table 29

Q7b1. And why as your organisation changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product?

Base: All respondents who have changed from a lower cost Royal Mail Product to a higher cost Royal Mail Product

Significance Level: 95%

Unweighted total

Weighted total

Better quality of service

Price increases

First class is not much quicker than second

Cost implications

Changes in the type of mail sent

Due to internal cost cutting

Became more aware of alternatives

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m
35	2	2	-	1	7	3	2	3	2	5	4	4	22
36	2	4	-	1	7	5	4	6	1	1	2	2	31
15	2	-	-	-	3	-	4	4	-	1	1	*	13
42%	100%	-%	-%	-%	41%	-%	100%	67%	-%	83%	62%	25%	40%
6	-	-	-	1	-	4	-	-	*	-	*	*	5
16%	-%	-%	-%	100%	-%	67%	-%	-%	13%	-%	7%	25%	16%
3	-	-	-	-	-	-	-	2	-	*	-	*	2
8%	-%	-%	-%	-%	-%	-%	-%	33%	-%	8%	-%	25%	7%
3	-	2	-	-	-	-	-	-	-	-	*	-	2
7%	-%	50%	-%	-%	-%	-%	-%	-%	-%	-%	31%	-%	7%
2	-	-	-	-	-	2	-	-	-	-	-	*	2
6%	-%	-%	-%	-%	-%	33%	-%	-%	-%	-%	-%	25%	6%
*	-	-	-	-	*	-	-	-	-	-	-	-	*
1%	-%	-%	-%	-%	3%	-%	-%	-%	-%	-%	-%	-%	1%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
9	-	2	-	-	5	-	-	-	1	*	*	-	9
26%	-%	50%	-%	-%	78%	-%	-%	-%	87%	8%	31%	-%	28%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Q7b1. And why as your organisation changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product?

Base: All respondents who have changed from a lower cost Royal Mail Product to a higher cost Royal Mail Product

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
		*a	*b	*c	*d	*e	*f	*a	*b	a	*b	*a	*b	*c	*d
Significance Level: 95%	35	27	7	-	1	-	8	24	11	31	4	24	2	5	4
Unweighted total	36	35	1	-	*	-	1	22	14	33	3	25	1	7	3
Weighted total															
Better quality of service	15	15	*	-	-	-	*	4	11	15	*	12	-	2	1
	42%	42%	46%	-%	-%	-%	38%	21%	75%	46%	3%	48%	-%	26%	41%
Price increases	6	5	*	-	*	-	*	6	-	3	3	1	1	4	-
	16%	15%	11%	-%	100%	-%	26%	26%	-%	8%	93%	6%	100%	49%	-%
First class is not much quicker than second	3	3	*	-	-	-	*	3	*	3	-	2	-	-	1
	8%	7%	11%	-%	-%	-%	10%	12%	1%	8%	-%	9%	-%	-%	19%
Cost implications	3	3	-	-	-	-	-	3	-	3	-	3	-	-	-
	7%	7%	-%	-%	-%	-%	-%	12%	-%	8%	-%	10%	-%	-%	-%
Changes in the type of mail sent	2	2	-	-	-	-	-	2	-	2	-	*	-	2	-
	6%	7%	-%	-%	-%	-%	-%	10%	-%	7%	-%	2%	-%	25%	-%
Due to internal cost cutting	*	-	*	-	-	-	*	*	-	*	-	*	-	-	-
	1%	-%	20%	-%	-%	-%	16%	1%	-%	1%	-%	1%	-%	-%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	9	9	*	-	-	-	*	4	5	9	*	8	-	-	1
	26%	26%	31%	-%	-%	-%	26%	19%	37%	28%	3%	33%	-%	-%	41%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

Table 29 (continuation)

Q7b1. And why as your organisation changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product?

Base: All respondents who have changed from a lower cost Royal Mail Product to a higher cost Royal Mail Product

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	35	14	5	4	5	3	4	30	3	-	1	1	11	1	7	5
Weighted total	36	15	5	6	6	2	-	31	2	-	2	1	10	1	7	4
Better quality of service	15	5	4	2	2	*	1	12	*	-	2	1	2	-	2	*
	42%	36%	77%	34%	39%	7%	70%	39%	5%	-%	100%	100%	21%	-%	23%	11%
Price increases	6	1	-	2	*	2	-	4	2	-	-	-	2	-	2	*
	16%	9%	-%	30%	8%	93%	-%	12%	95%	-%	-%	-%	20%	-%	26%	4%
First class is not much quicker than second	3	2	-	-	-	-	1	3	-	-	-	-	2	-	*	2
	8%	14%	-%	-%	-%	-%	30%	9%	-%	-%	-%	-%	23%	-%	2%	50%
Cost implications	3	-	*	2	-	-	-	3	-	-	-	-	2	-	2	-
	7%	-%	9%	36%	-%	-%	-%	8%	-%	-%	-%	-%	21%	-%	31%	-%
Changes in the type of mail sent	2	-	*	-	2	-	-	2	-	-	-	-	-	-	-	-
	6%	-%	9%	-%	31%	-%	-%	7%	-%	-%	-%	-%	-%	-%	-%	-%
Due to internal cost cutting	*	-	*	-	-	-	-	*	-	-	-	-	*	-	-	*
	1%	-%	4%	-%	-%	-%	-%	1%	-%	-%	-%	-%	2%	-%	-%	4%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	9	8	-	*	1	-	-	9	-	-	-	-	2	1	1	2
	26%	53%	-%	3%	22%	-%	-%	31%	-%	-%	-%	-%	20%	100%	21%	42%
Don't know	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 29 (continuation)

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Q7b1. And why as your organisation changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product?

Base: All respondents who have changed from a lower cost Royal Mail Product to a higher cost Royal Mail Product

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	35	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	36	16	3	16	34	23	34	20	14	28	19	30	9	29	22
		16	3	16	36	24	36	21	15	29	22	29	7	27	20
Better quality of service	15	6	3	6	15	11	15	6	7	12	8	12	3	12	6
	42%	34%	100%	38%	42%	49%	42%	28%	43%	42%	36%	43%	44%	45%	28%
Price increases	6	2	-	4	6	4	6	6	2	6	2	6	*	4	6
	16%	10%	-%	25%	16%	18%	16%	27%	13%	19%	10%	19%	6%	14%	27%
First class is not much quicker than second	3	2	-	1	3	1	3	3	2	3	3	3	1	3	2
	8%	13%	-%	4%	8%	3%	8%	13%	15%	9%	12%	9%	8%	10%	11%
Cost implications	3	*	-	2	3	2	3	-	3	3	2	3	-	3	2
	7%	3%	-%	13%	7%	9%	7%	-%	17%	9%	10%	9%	-%	9%	10%
Changes in the type of mail sent	2	*	-	2	2	2	2	2	2	2	2	*	*	*	*
	6%	3%	-%	11%	6%	10%	6%	9%	12%	8%	8%	2%	6%	2%	2%
Due to internal cost cutting	*	-	-	*	*	*	*	-	*	*	*	*	-	*	*
	1%	-%	-%	1%	1%	1%	1%	-%	1%	1%	1%	1%	-%	1%	1%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	9	6	1	2	9	5	9	5	1	6	5	7	3	7	6
	26%	38%	41%	11%	26%	19%	26%	26%	10%	19%	23%	25%	37%	26%	29%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

Q7b1. And why as your organisation changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product?

Base: All respondents who have changed from a lower cost Royal Mail Product to a higher cost Royal Mail Product

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		*a	b	*c	a	b	c	d	e	*f	*a	b	*c	*a	*b	*c
Unweighted total	35	14	35	-	34	33	35	30	35	-	21	35	9	7	5	23
Weighted total	36	13	36	-	35	35	36	31	36	-	23	36	8	8	4	23
Better quality of service	15	8	15	-	14	15	15	13	15	-	10	15	3	4	2	9
	42%	61%	42%	-%	40%	43%	42%	41%	42%	-%	43%	42%	45%	42%	57%	39%
Price increases	6	*	6	-	6	6	6	6	6	-	6	6	2	2	-	4
	16%	1%	16%	-%	16%	16%	16%	18%	16%	-%	24%	16%	30%	21%	-%	17%
First class is not much quicker than second	3	*	3	-	3	3	3	3	3	-	1	3	*	*	-	2
	8%	1%	8%	-%	8%	8%	8%	9%	8%	-%	3%	8%	1%	6%	-%	10%
Cost implications	3	-	3	-	3	2	3	-	3	-	-	3	-	-	-	3
	7%	-%	7%	-%	8%	6%	7%	-%	7%	-%	-%	7%	-%	-%	-%	11%
Changes in the type of mail sent	2	2	2	-	2	2	2	2	2	-	2	2	*	-	*	2
	6%	17%	6%	-%	7%	6%	6%	7%	6%	-%	10%	6%	6%	-%	12%	8%
Due to internal cost cutting	*	-	*	-	*	*	*	-	*	-	-	*	-	-	-	*
	1%	-%	1%	-%	1%	1%	1%	-%	1%	-%	-%	1%	-%	-%	-%	1%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	9	3	9	-	8	9	9	9	9	-	6	9	1	3	1	5
	26%	24%	26%	-%	23%	27%	26%	30%	26%	-%	27%	26%	20%	31%	31%	24%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 29 (continuation)

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Q7bf. And why as your organisation changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product?
Base: All respondents who have changed from a lower cost Royal Mail Product to a higher cost Royal Mail Product

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	*c	*a	*b	a	*b	*a	*b	*a	*b	*a	*b
Unweighted total	35	4	3	28	27	8	31	4	23	-	10	25	10	-
Weighted total	36	6	4	26	32	4	33	2	21	-	10	25	8	-
Better quality of service	15	1	2	11	14	1	14	1	9	-	4	11	1	-
	42%	22%	56%	44%	43%	36%	42%	46%	43%	-%	34%	45%	10%	-%
Price increases	6	1	2	3	5	1	6	-	4	-	4	2	*	-
	16%	22%	44%	10%	15%	19%	17%	-%	21%	-%	34%	8%	2%	-%
First class is not much quicker than second	3	2	-	1	3	-	3	-	1	-	3	*	2	-
	8%	35%	-%	2%	8%	-%	8%	-%	3%	-%	25%	*%	28%	-%
Cost implications	3	-	-	3	2	*	3	-	*	-	-	3	2	-
	7%	-%	-%	10%	7%	12%	8%	-%	2%	-%	-%	10%	26%	-%
Changes in the type of mail sent	2	-	-	2	2	-	2	-	*	-	*	2	-	-
	6%	-%	-%	9%	7%	-%	7%	-%	2%	-%	5%	7%	-%	-%
Due to internal cost cutting	*	-	-	*	*	-	*	-	-	-	*	-	*	-
	1%	-%	-%	1%	1%	-%	1%	-%	-%	-%	2%	-%	2%	-%
Became more aware of alternatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	9	1	-	8	8	2	8	1	8	-	-	9	3	-
	26%	22%	-%	31%	24%	44%	24%	54%	38%	-%	-%	37%	40%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Q7b1. And why as your organisation changed mail from a lower cost Royal Mail product to a higher cost Royal Mail product?

Base: All respondents who have changed from a lower cost Royal Mail Product to a higher cost Royal Mail Product

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
		*a	*b	*c	*d
Significance Level: 95%	35	10	11	8	6
Unweighted total	36	13	10	6	8
Weighted total					
Better quality of service	15	6	4	2	3
	42%	49%	39%	41%	35%
Price increases	6	2	2	*	1
	16%	14%	22%	9%	16%
First class is not much quicker than second	3	-	2	*	-
	8%	-%	23%	9%	-%
Cost implications	3	2	-	*	-
	7%	17%	-%	9%	-%
Changes in the type of mail sent	2	-	-	*	2
	6%	-%	-%	9%	23%
Due to internal cost cutting	*	-	*	-	-
	1%	-%	2%	-%	-%
Became more aware of alternatives	-	-	-	-	-
	-%	-%	-%	-%	-%
Other	9	5	1	1	2
	26%	36%	14%	25%	27%
Don't know	-	-	-	-	-
	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d

Table 30
Q7bii. And why as your organisation changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product?
Base: All respondents who have changed from a higher cost Royal Mail Product to a lower cost Royal Mail Product

Significance Level: 95%
Unweighted total
Weighted total

Price increases
Due to internal cost cutting

First class is not much quicker than second

Cost implications

Changes in the type of mail sent

Better quality of service

Became more aware of alternatives

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	*a	*b	*c	*d	*e	f	*g	*h	*i	j	k	l	m
276	15	18	12	18	20	37	20	19	11	38	38	30	170
261	20	31	17	16	23	53	23	28	10	16	15	11	219
219	15	27	16	14	17	44	15	26	8	14	13	9	183
84%	72%	86%	99%	90%	77%	83%	68%	95%	83%	90%	89%	80%	83%
43	7	4	*	4	5	11	4	3	-	2	2	1	38
17%	37%	14%	1%	25%	23%	20%	16%	11%	-%	15%	11%	10%	17%
14	*	-	2	1	-	4	4	*	-	1	1	-	11
5%	1%	-%	11%	8%	-%	7%	16%	1%	-%	9%	10%	-%	5%
9	-	-	-	-	1	2	4	*	*	*	1	*	7
3%	-%	-%	-%	-%	6%	4%	16%	1%	2%	1%	4%	4%	3%
6	2	-	-	-	1	-	-	-	*	*	*	1	3
2%	10%	-%	-%	-%	6%	-%	-%	-%	2%	3%	3%	13%	2%
												fm	
5	-	-	-	-	-	-	4	-	1	*	-	-	5
2%	-%	-%	-%	-%	-%	-%	16%	-%	13%	3%	-%	-%	2%
4	-	-	-	-	1	2	-	-	-	1	-	*	3
2%	-%	-%	-%	-%	6%	3%	-%	-%	-%	6%	-%	1%	1%
11	2	2	*	*	1	4	*	*	-	1	*	1	10
4%	9%	7%	1%	1%	6%	7%	1%	1%	-%	4%	1%	6%	4%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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Table 30 (continuation) Page 302

Q7bii. And why as your organisation changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product?

Base: All respondents who have changed from a higher cost Royal Mail Product to a lower cost Royal Mail Product

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	276	202	43	17	8	6	74	181	95	256	20	161	56	26	33
Weighted total	261	248	7	3	1	1	12	171	89	250	10	177	42	18	24
Price increases	219	210	6	2	1	1	9	149	70	209	10	152	39	13	16
	84%	85%	82%	55%	63%	73%	73%	87%	79%	84%	95%	86%	92%	71%	67%
		f										d	d		
Due to internal cost cutting	43	42	1	1	*	*	2	23	21	43	*	27	6	4	6
	17%	17%	12%	21%	12%	12%	14%	13%	24% a	17%	5%	15%	15%	20%	25%
First class is not much quicker than second	14	13	*	*	-	-	1	9	5	14	*	9	*	3	2
	5%	5%	4%	11%	-%	-%	5%	5%	5%	5%	1%	5%	*%	15%	8%
Cost implications	9	8	1	*	-	*	1	5	4	9	*	8	*	*	*
	3%	3%	9%	8%	-%	12%	8%	3%	4%	3%	1%	4%	1%	2%	1%
Changes in the type of mail sent	6	5	*	-	*	-	*	4	2	6	-	2	1	*	2
	2%	2%	2%	-%	16%	-%	3%	2%	3%	2%	-%	1%	3%	3%	7% a
Better quality of service	5	5	-	-	-	-	-	2	4	5	-	3	*	-	2
	2%	2%	-%	-%	-%	-%	-%	1%	4%	2%	-%	2%	1%	-%	7%
Became more aware of alternatives	4	4	-	-	*	-	*	3	1	4	-	4	*	-	*
	2%	2%	-%	-%	9%	-%	1%	2%	1%	2%	-%	2%	1%	-%	*%
Other	11	10	1	*	-	*	1	9	2	11	*	8	*	2	*
	4%	4%	9%	15%	-%	15%	10% a	5%	3%	4%	2%	5%	*%	12%	2%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 30 (continuation)

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Q7bii. And why as your organisation changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product?

Base: All respondents who have changed from a higher cost Royal Mail Product to a lower cost Royal Mail Product

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	a	b
Unweighted total	276	77	62	42	48	26	18	3	231	18	9	12	6	56	21	41	36
Weighted total	261	88	63	46	40	14	9	2	217	17	5	11	11	48	26	35	39
Price increases	219	77	54	41	31	10	3	2	185	14	5	7	8	35	26	26	35
	84%	87%	86%	90%	80%	77%	37%	89%	85%	83%	100%	63%	72%	73%	100%	73%	92% a
Due to internal cost cutting	43	8	4	16	7	3	6	-	35	2	*	2	3	13	4	11	7
	17%	9%	6%	36% abd	17%	21%	66%	-%	16%	14%	7%	19%	31%	28%	17%	31%	18%
First class is not much quicker than second	14	4	4	2	2	2	*	-	10	-	*	4	-	4	*	4	*
	5%	4%	6%	4%	6%	17%	2%	-%	5%	-%	3%	33%	-%	8%	2%	11%	1%
Cost implications	9	3	4	2	-	*	-	*	8	*	-	-	-	1	-	1	*
	3%	3%	6%	4%	-%	2%	-%	11%	4%	2%	-%	-%	-%	2%	-%	2%	1%
Changes in the type of mail sent	6	1	*	-	2	2	-	-	3	1	-	2	-	4	*	2	2
	2%	1%	1%	-%	6%	16%	-%	-%	2%	4%	-%	16%	-%	8%	2%	6%	5%
Better quality of service	5	-	3	-	2	-	-	-	4	-	-	-	2	2	-	2	-
	2%	-%	5%	-%	6% a	-%	-%	-%	2%	-%	-%	-%	16%	4%	-%	5%	-%
Became more aware of alternatives	4	-	2	2	*	-	*	-	4	-	-	*	-	-	-	-	-
	2%	-%	3%	4%	1%	-%	1%	-%	2%	-%	-%	1%	-%	-%	-%	-%	-%
Other	11	6	3	-	2	*	*	-	11	*	-	*	-	1	-	1	*
	4%	7%	4%	-%	6%	1%	1%	-%	5%	1%	-%	1%	-%	2%	-%	2%	1%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Table 30 (continuation)

Q7bii. And why as your organisation changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product?

Base: All respondents who have changed from a higher cost Royal Mail Product to a lower cost Royal Mail Product

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	276	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	261	117	58	100	266	188	268	147	93	234	134	263	60	202	258
Price increases	219	109	53	97	251	171	255	131	72	222	123	247	47	188	242
	84%	94	47	76	212	142	215	112	54	188	105	212	35	155	209
		87%	89%	78%	84% e	83%	85% e	86% e	75%	85% e	86%	86%	76%	83%	86%
Due to internal cost cutting	43														
	17%	15	9	19	42	31	42	19	18	39	14	42	10	34	42
		14%	17%	20%	17%	18%	17%	15%	25%	18%	11%	17%	22%	18%	17%
First class is not much quicker than second	14	6	-	8	14	10	14	7	6	10	6	13	2	11	11
	5%	5%	-%	8% b	5%	6%	5%	5%	9%	4%	5%	5%	4%	6%	5%
Cost implications	9	4	*	5	9	4	9	4	2	7	3	9	1	7	7
	3%	3%	1%	5%	3%	2%	3%	3%	3%	3%	2%	3%	2%	4%	3%
Changes in the type of mail sent	6	3	*	2	4	5	6	5	1	5	3	6	4	5	6
	2%	3%	1%	2%	2%	3%	2%	4%	2%	2%	2%	2%	8% b	3%	2%
Better quality of service	5	1	*	4	5	2	5	2	2	4	2	5	2	4	5
	2%	1%	1%	4%	2%	1%	2%	1%	2%	2%	1%	2%	4%	2%	2%
Became more aware of alternatives	4	2	2	-	4	3	4	1	1	4	*	4	*	1	4
	2%	2%	4%	-%	2%	2%	2%	1%	1%	2%	1%	2%	1%	1%	2%
Other	11	4	*	6	9	8	9	5	4	7	5	5	1	5	5
	4%	4%	1%	7%	3%	5%	3%	4%	5%	3%	4%	2%	2%	3%	2%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 30 (continuation)

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Q7bii. And why as your organisation changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product?

Base: All respondents who have changed from a higher cost Royal Mail Product to a lower cost Royal Mail Product

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	*c	a	b	c	d	e	*f	a	b	c	*a	b	c
Unweighted total	276	276	14	-	272	248	274	231	275	-	181	274	80	26	66	183
Weighted total	261	261	13	-	257	231	258	213	259	-	168	259	60	26	55	180
Price increases	219	219	2	-	215	193	217	175	217	-	132	217	45	16	47	155
	84%	84%	18%	-%	84%	83%	84%	82%	84%	-%	78%	84%	75%	64%	85%	86%
Due to internal cost cutting	43	43	4	-	43	35	43	39	43	-	35	43	16	8	8	28
	17%	17%	33%	-%	17%	15%	17%	18%	17%	-%	21%	17%	27%	32%	14%	15%
First class is not much quicker than second	14	14	2	-	14	14	14	10	14	-	8	14	2	2	-	11
	5%	5%	17%	-%	5%	6%	5%	5%	5%	-%	5%	5%	3%	9%	-%	6%
																b
Cost implications	9	9	2	-	9	7	9	6	9	-	8	9	2	*	2	6
	3%	3%	18%	-%	3%	3%	3%	3%	3%	-%	5%	3%	4%	-%	4%	4%
Changes in the type of mail sent	6	6	1	-	6	6	6	6	6	-	5	6	3	2	2	1
	2%	2%	6%	-%	2%	3%	2%	3%	2%	-%	3%	2%	6%	9%	4%	1%
Better quality of service	5	5	-	-	5	3	5	5	5	-	5	5	2	-	1	4
	2%	2%	-%	-%	2%	1%	2%	2%	2%	-%	3%	2%	3%	-%	2%	2%
Became more aware of alternatives	4	4	-	-	4	3	4	2	4	-	3	4	2	-	4	1
	2%	2%	-%	-%	2%	1%	2%	1%	2%	-%	2%	2%	3%	-%	7%	-%
															c	
Other	11	11	3	-	11	11	11	11	11	-	8	11	1	2	2	7
	4%	4%	24%	-%	4%	5%	4%	5%	4%	-%	5%	4%	2%	6%	4%	4%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 30 (continuation)

Page 306

Q7bii. And why as your organisation changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product?
Base: All respondents who have changed from a higher cost Royal Mail Product to a lower cost Royal Mail Product

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	276	33	21	220	203	73	260	16	155	33	95	181	69	1
Weighted total	261	34	17	209	184	76	246	15	152	26	85	175	66	1
Price increases	219	29	9	180	146	73	204	15	126	22	66	153	54	1
	84%	87%	54%	86%	79%	96% a	83%	100%	83%	84%	77%	87% a	82%	100%
Due to internal cost cutting	43	6	7	31	38	6	43	*	33	4	13	31	17	-
	17%	17%	39%	15%	20% b	8%	18%	3%	22%	15%	15%	17%	25%	-%
First class is not much quicker than second	14	2	*	11	13	1	14	-	9	2	5	9	4	-
	5%	5%	3%	5%	7%	1%	6%	-%	6%	7%	6%	5%	7%	-%
Cost implications	9	1	*	7	8	1	9	-	7	*	2	6	1	-
	3%	4%	1%	3%	4%	1%	4%	-%	4%	1%	3%	4%	2%	-%
Changes in the type of mail sent	6	2	-	4	3	2	6	*	3	-	4	2	4	-
	2%	5%	-%	2%	2%	3%	2%	1%	2%	-%	4%	1%	6%	-%
Better quality of service	5	-	2	4	5	-	5	-	2	2	4	2	2	-
	2%	-%	11%	2%	3%	-%	2%	-%	1%	7% a	4%	1%	3%	-%
Became more aware of alternatives	4	-	1	4	4	*	4	-	*	4	2	2	-	-
	2%	-%	3%	2%	2%	1%	2%	-%	*%	14% a	2%	1%	-%	-%
Other	11	-	*	11	10	1	11	-	3	2	2	9	1	-
	4%	-%	1%	5%	6%	1%	4%	-%	2%	8%	2%	5%	1%	-%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 30 (continuation)

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Q7bii. And why as your organisation changed mail from a higher cost Royal Mail product to a lower cost Royal Mail product?
Base: All respondents who have changed from a higher cost Royal Mail Product to a lower cost Royal Mail Product

Significance Level: 95%

Unweighted total

Weighted total

Price increases

Due to internal cost cutting

First class is not much quicker than second

Cost implications

Changes in the type of mail sent

Better quality of service

Became more aware of alternatives

Other

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
276	87	80	51	58
261	70	80	55	55
219	54	70	48	46
84%	77%	88%	88%	83%
43	17	13	8	6
17%	24%	17%	14%	10%
	d			
14	-	6	*	7
5%	-%	8%	*%	13%
		a		ac
9	5	-	*	4
3%	7%	-%	*%	6%
	b			b
6	2	*	1	2
2%	3%	*%	2%	4%
5	5	-	-	-
2%	8%	-%	-%	-%
	bcd			
4	2	*	1	*
2%	3%	1%	2%	1%
11	5	*	2	3
4%	8%	1%	4%	5%
	b			
-	-	-	-	-
-%	-%	-%	-%	-%

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

Significance Level: 95%
Unweighted total
Weighted total

Packetpost

PPI 2nd Class

Presstream 2

PPI 1st Class

Mailsort 3

Mailsort 2

Royal Mail International
Bulk Mail

Packetsort

Sustainable Mail

Cleanmail

Cleanmail Advance

Responsible Mail

Cleanmail Plus

Presstream 1

Big Book and Royal Mail
Heavyweight

Walksort 1st Class

Walksort 2nd Class

Mailsort 1

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
444	*a	b	*c	d	*e	f	g	h	*i	j	k	l	m
18	18	31	23	38	25	58	31	35	29	58	46	52	288
375	16	42	26	29	20	68	41	56	24	21	15	15	323
10	-	5	*	-	-	-	-	2	1	1	1	*	8
3%	-%	11%	1%	-%	-%	-%	-%	4%	5%	3%	9%	1%	3%
		dfm									fm		
5	-	-	2	2	-	*	-	-	-	-	1	*	4
1%	-%	-%	7%	6%	-%	*%	-%	-%	-%	-%	5%	3%	1%
				m									
4	-	*	-	-	1	2	-	-	-	-	-	-	4
1%	-%	1%	-%	-%	6%	3%	-%	-%	-%	-%	-%	-%	1%
3	-	-	-	1	-	*	-	-	1	-	-	-	3
1%	-%	-%	-%	4%	-%	*%	-%	-%	6%	-%	-%	-%	1%
3	-	*	-	-	-	2	-	-	-	-	*	-	2
1%	-%	1%	-%	-%	-%	3%	-%	-%	-%	-%	3%	-%	1%
2	-	-	-	-	-	2	-	-	-	-	*	-	2
1%	-%	-%	-%	-%	-%	3%	-%	-%	-%	-%	3%	-%	1%
1	-	-	-	1	-	-	-	-	-	-	*	-	1
*%	-%	-%	-%	4%	-%	-%	-%	-%	-%	-%	1%	-%	*%
				m									
1	-	-	*	-	-	-	-	-	-	-	*	-	*
*%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	3%	-%	*%
											m		
1	-	-	*	-	-	-	-	-	-	-	*	-	*
*%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	3%	-%	*%
											m		
*	-	*	-	-	-	-	-	-	-	-	*	-	*
*%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	*%
*	-	-	-	-	-	-	-	-	-	*	*	-	-
*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	1%	-%	-%
											m		
*	-	-	*	-	-	-	-	-	-	-	-	-	*
*%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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Table 31 (continuation)

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QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

Significance Level: 95%

Unweighted total

Weighted total

Mail Media

Other (DO NOT READ OUT,
PLEASE SPECIFY)

None of these (DO NOT
READ OUT)

Don't Know (DO NOT READ
OUT)

NET: Cleanmail

NET: Presstream

NET: Walksort

NET: Mailsort

NET: PPI

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
444	*a	b	*c	d	*e	f	g	h	*i	j	k	l	m
375	18	31	23	38	25	58	31	35	29	58	46	52	288
	16	42	26	29	20	68	41	56	24	21	15	15	323
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
10	-	-	-	4	-	2	*	2	*	2	-	*	9
3%	-%	-%	-%	15%	-%	3%	1%	4%	1%	8%	-%	1%	3%
			bfgklm										
338	16	37	22	22	19	62	41	52	23	18	13	14	293
90%	100%	87%	85%	75%	93%	91% d	100% bdjk	92%	93%	86%	85%	92% d	91% d
5	-	-	2	-	*	2	-	-	-	*	*	*	4
1%	-%	-%	7%	-%	1%	3%	-%	-%	-%	2%	1%	3%	1%
1	-	*	-	-	-	-	-	-	-	*	*	-	*
1%	-%	1%	-%	-%	-%	-%	-%	-%	-%	1%	1%	-%	1%
4	-	*	-	-	1	2	-	-	-	-	-	-	4
1%	-%	1%	-%	-%	6%	3%	-%	-%	-%	-%	-%	-%	1%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
3	-	*	-	-	-	2	-	-	-	-	*	-	2
1%	-%	1%	-%	-%	-%	3%	-%	-%	-%	-%	3%	-%	1%
6	-	-	2	2	-	*	-	-	1	-	1	*	5
2%	-%	-%	7%	6%	-%	1%	-%	-%	6%	-%	5%	3%	2%

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Table 31 (continuation)

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	444	268	100	33	23	20	176	302	142	392	52	164	126	65	89
Weighted total	375	346	17	6	4	3	29	258	117	354	21	175	108	50	42
Packetpost	10	10	*	*	*	*	1	6	4	8	3	3	4	3	*
	3%	3%	1%	8%	3%	4%	3%	2%	4%	2%	14%	2%	4%	5%	%
				b							a			d	
PPI 2nd Class	5	4	*	*	-	*	1	4	1	5	-	-	*	*	4
	1%	1%	1%	6%	-%	10%	3%	1%	1%	1%	-%	-	%	1%	10%
															abc
Presstream 2	4	3	*	-	*	-	*	2	2	4	-	-	-	-	4
	1%	1%	1%	-%	9%	-%	2%	1%	2%	1%	-%	-%	-%	-%	8%
															abc
PPI 1st Class	3	3	*	*	-	-	*	3	*	3	-	-	1	-	1
	1%	1%	1%	2%	-%	-%	1%	1%	%	1%	-%	-%	1%	-	4%
															a
Mailsort 3	3	2	-	-	*	-	*	-	3	2	*	-	-	-	3
	1%	1%	-%	-%	9%	-%	1%	-%	2%	1%	2%	-%	-%	-%	6%
									a						abc
Mailsort 2	2	2	-	-	-	-	-	-	2	2	-	-	-	-	2
	1%	1%	-%	-%	-%	-%	-%	-%	2%	1%	-%	-%	-%	-%	5%
									a						ab
Royal Mail International Bulk Mail	1	1	-	-	*	-	*	1	-	1	*	*	1	-	-
	%	%	-%	-	3%	-%	%	1%	-%	%	1%	%	1%	-%	-%
Packetsort	1	*	-	*	-	-	*	*	*	*	*	*	*	-	*
	%	%	-%	2%	-%	-%	%	%	%	%	1%	%	%	-%	-%
				a											
Sustainable Mail	1	*	-	*	-	-	*	*	*	*	*	-	*	-	*
	%	%	-%	2%	-%	-%	%	%	%	%	1%	-%	%	-%	1%
				a											
Cleanmail	*	-	*	-	-	*	*	*	-	*	-	-	*	-	*
	%	-%	2%	-%	-%	4%	1%	%	-%	%	-%	-%	%	-%	%
			a				a								
Cleanmail Advance	*	-	*	-	*	*	*	*	-	*	-	-	-	-	*
	%	-%	1%	-%	6%	4%	1%	%	-%	%	-%	-%	-%	-%	1%
							a								
Responsible Mail	*	-	-	*	-	-	*	*	-	-	*	-	*	-	-
	%	-%	-%	2%	-%	-%	%	%	-%	-%	1%	-%	%	-%	-%
				a											
Cleanmail Plus	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Presstream 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Big Book and Royal Mail Heavyweight	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Walksort 1st Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 31 (continuation)

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	444	268	100	33	23	20	176	302	142	392	52	164	126	65	89
Weighted total	375	346	17	6	4	3	29	258	117	354	21	175	108	50	42
Walksort 2nd Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mailsort 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mail Media	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (DO NOT READ OUT, PLEASE SPECIFY)	10	9	1	*	-	-	1	8	2	10	*	3	2	3	3
	3%	3%	6%	3%	-%	-%	4%	3%	2%	3%	1%	2%	2%	5%	6%
															a
None of these (DO NOT READ OUT)	338	314	15	5	2	2	24	231	107	321	17	165	98	45	30
	90%	91%	88%	83%	69%	78%	84%	90%	91%	91%	82%	95%	91%	89%	71%
		f										d	d	d	
Don't Know (DO NOT READ OUT)	5	5	*	-	-	*	*	5	*	5	*	4	*	*	1
	1%	1%	1%	-%	-%	8%	2%	2%	1%	1%	1%	2%	1%	1%	2%
NET: Cleanmail	1	-	*	-	*	*	1	1	-	1	-	-	*	-	*
	1%	-%	3%	-%	6%	4%	3%	1%	-%	1%	-%	-%	1%	-%	1%
			a				a								
NET: Presstream	4	3	*	-	*	-	*	2	2	4	-	-	-	-	4
	1%	1%	1%	-%	9%	-%	2%	1%	2%	1%	-%	-%	-%	-%	8%
															abc
NET: Walksort	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Mailsort	3	2	-	-	*	*	*	-	3	2	*	-	-	-	3
	1%	1%	-%	-%	9%	-%	1%	-%	2%	1%	2%	-%	-%	-%	6%
									a						abc
NET: PPI	6	5	*	*	-	*	1	5	1	6	-	-	1	*	4
	2%	2%	2%	6%	-%	10%	3%	2%	1%	2%	-%	-%	1%	1%	10%
															abc

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 31 (continuation)

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Significance Level: 95%																	
Unweighted total	444	63	68	81	100	69	53	10	316	45	30	30	23	121	42	85	78
Weighted total	375	68	68	84	91	43	17	4	292	28	19	21	16	96	39	61	74
Packetpost	10	1	3	4	2	-	1	-	5	3	-	1	2	1	5	1	5
	3%	1%	4%	4%	2%	-%	4%	-%	2%	9%	-%	3%	14%	1%	13%	2%	6%
										a					a		
PPI 2nd Class	5	-	-	-	*	2	1	2	*	2	*	1	2	2	*	*	2
	1%	-%	-%	-%	1%	4%	4%	48%	1%	6%	1%	5%	10%	2%	1%	1%	3%
										a		a					
Presstream 2	4	*	-	-	-	-	2	2	3	-	*	-	-	1	*	1	*
	1%	1%	-%	-%	-%	-%	11%	38%	1%	-%	2%	-%	-%	1%	1%	2%	1%
							abcde										
PPI 1st Class	3	-	-	1	-	1	*	-	1	-	*	-	1	1	-	-	1
	1%	-%	-%	2%	-%	3%	1%	-%	1%	-%	1%	-	9%	1%	-%	-%	2%
Mailsort 3	3	-	-	-	-	-	3	-	3	-	-	-	-	*	-	*	-
	1%	-%	-%	-%	-%	-%	15%	-%	1%	-%	-%	-%	-%	1%	-%	1%	-%
							abcde										
Mailsort 2	2	-	-	-	-	-	2	-	2	-	-	-	-	*	-	*	-
	1%	-%	-%	-%	-%	-%	14%	-%	1%	-%	-%	-%	-%	1%	-%	1%	-%
							abcde										
Royal Mail International Bulk Mail	1	1	-	-	-	-	-	-	*	1	-	-	-	-	1	-	1
	1%	2%	-%	-%	-%	-%	-%	-%	1%	5%	-%	-%	-%	-%	3%	-%	2%
										a					a		
Packetsort	1	*	*	-	-	-	-	-	1	-	-	-	-	-	1	*	*
	1%	1%	1%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	2%	1%	1%
Sustainable Mail	1	-	*	-	-	-	*	-	1	-	-	-	-	*	*	*	*
	1%	-%	1%	-%	-%	-%	3%	-%	1%	-%	-%	-%	-%	1%	1%	1%	1%
Cleanmail	*	-	-	-	-	*	-	*	*	-	-	-	-	*	-	*	-
	1%	-%	-%	-%	-%	1%	-%	3%	1%	-%	-%	-%	-%	1%	-%	1%	-%
Cleanmail Advance	*	-	-	-	-	-	*	*	*	*	*	*	*	*	-	*	-
	1%	-%	-%	-%	-%	-%	1%	5%	1%	1%	1%	1%	-%	1%	-%	1%	-%
Responsible Mail	*	-	*	-	-	-	-	-	*	-	-	-	-	-	*	-	*
	1%	-%	1%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	1%	-%	1%
Cleanmail Plus	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Presstream 1	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Big Book and Royal Mail Heavyweight	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Walksort 1st Class	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Walksort 2nd Class	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 31 (continuation)

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	*e	a	b	a	b
Unweighted total	444	63	68	81	100	69	53	10	316	45	30	30	23	121	42	85	78
Weighted total	375	68	68	84	91	43	17	4	292	28	19	21	16	96	39	61	74
Mailsort 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mail Media	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (DO NOT READ OUT, PLEASE SPECIFY)	10	1	-	3	5	1	*	-	6	1	*	1	2	*	2	*	2
	3%	2%	-%	4%	6%	2%	1%	-%	2%	4%	1%	6%	14%	3%	5%	3%	3%
				b										a			
None of these (DO NOT READ OUT)	338	61	65	77	83	40	12	*	272	20	18	18	9	90	29	56	63
	90%	89% f	96% f	92% f	91% f	94% f	74%	8%	93% b	73%	96% b	88%	60%	93% b	74%	92%	85%
Don't Know (DO NOT READ OUT)	5	4	-	*	1	-	*	*	4	*	-	-	*	2	1	2	1
	1%	5% c	-%	3%	1%	-%	3%	3%	1%	2%	-%	-%	2%	2%	2%	3%	1%
NET: Cleanmail	1	-	-	-	-	*	*	*	*	*	*	*	-	*	-	*	-
	3%	-%	-%	-%	-%	1%	1%	5%	3%	3%	1%	1%	-%	-%	-%	-%	-%
NET: Presstream	4	*	-	-	-	-	2	2	3	-	*	-	-	1	*	1	*
	1%	3%	-%	-%	-%	-%	11%	38%	1%	-%	2%	-%	-%	1%	1%	2%	1%
						abcde											
NET: Walksort	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Mailsort	3	-	-	-	-	-	3	-	3	-	-	-	-	*	-	*	-
	1%	-%	-%	-%	-%	-%	15%	-%	1%	-%	-%	-%	-%	1%	-%	1%	-%
						abcde											
NET: PPI	6	-	-	1	*	2	1	2	2	2	*	1	2	2	*	*	2
	2%	-%	-%	2%	1%	4%	5%	48%	1%	6%	2%	5%	10%	2%	1%	3%	3%
									a			a					

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 31 (continuation)

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QV8. Do you use any of the following Royal Mail products to send your bulk mailings?
Base: All respondents who send bulk mail

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	444	139	110	193	434	341	437	290	444	397	234	430	124	364	368
Weighted total	375	122	87	164	367	272	371	224	375	337	184	362	81	303	306
Packetpost	10	1	*	9	10	9	10	10	10	10	10	10	7	10	10
	3%	1%	%	6%		3%	3%	4%	3%	3%	6%	3%	8%	3%	3%
				ab									b		
PPI 2nd Class	5	*	*	4	5	4	5	5	5	5	4	5	2	3	5
	1%	1%	1%	3%	1%	1%	1%	2%	1%	1%	2%	1%	3%	1%	2%
Presstream 2	4	*	-	3	4	4	4	2	4	4	*	4	*	4	4
	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
PPI 1st Class	3	-	*	3	3	3	3	3	3	3	3	3	1	3	3
	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	2%	1%	2%	1%	1%
Mailsort 3	3	-	*	2	3	2	3	*	3	2	*	2	-	2	2
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Mailsort 2	2	-	*	2	2	2	2	*	2	2	*	2	-	2	2
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Royal Mail International Bulk Mail	1	-	-	1	1	*	1	1	1	1	1	1	-	1	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Packetsort	1	*	-	*	1	1	1	1	1	1	1	1	-	1	1
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Sustainable Mail	1	*	*	-	1	*	1	1	1	1	1	*	-	*	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Cleanmail	*	*	-	*	*	*	*	*	*	*	*	*	*	*	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Cleanmail Advance	*	-	-	*	*	*	*	*	*	*	*	*	*	*	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Responsible Mail	*	*	-	-	*	*	*	*	*	*	*	*	-	*	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Cleanmail Plus	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Presstream 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Big Book and Royal Mail Heavyweight	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Walksort 1st Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Walksort 2nd Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Mailsort 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Mail Media	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

Significance Level: 95%

Unweighted total

Weighted total

Other (DO NOT READ OUT,
PLEASE SPECIFY)

None of these (DO NOT
READ OUT)

Don't Know (DO NOT READ
OUT)

NET: Cleanmail

NET: Presstream

NET: Walksort

NET: Mailsort

NET: PPI

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
444	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	139	110	193	434	341	437	290	444	397	234	430	124	364	368
Weighted total	122	87	164	367	272	371	224	375	337	184	362	81	303	306
Other (DO NOT READ OUT, PLEASE SPECIFY)	10	4	1	10	5	10	6	10	9	6	10	5	8	10
3%	3%	2%	3%	3%	2%	3%	3%	3%	3%	3%	3%	6%	3%	3%
None of these (DO NOT READ OUT)	338	113	84	331	247	335	198	338	302	159	326	65	273	274
90%	93% c	97% c	85%	90%	91%	90%	88%	90%	90%	86%	90% c	80%	90%	90%
Don't Know (DO NOT READ OUT)	5	4	1	5	3	5	2	5	5	2	5	2	4	3
1%	3% c	1%	*%	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%
NET: Cleanmail	1	*	-	1	1	1	1	1	1	*	1	*	1	1
*%	*%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
NET: Presstream	4	*	-	4	4	4	2	4	4	*	4	*	4	4
1%	*%	-%	2%	1%	1%	1%	1%	1%	1%	*%	1%	*%	1%	1%
NET: Walksort	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Mailsort	3	-	*	3	2	3	*	3	2	*	2	-	2	2
1%	-%	1%	1%	1%	1%	1%	*%	1%	1%	*%	1%	-%	1%	1%
NET: PPI	6	*	*	6	5	6	6	6	6	6	6	2	4	6
2%	*%	*%	3%	2%	2%	2%	3%	2%	2%	3%	2%	3%	1%	2%

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Table 31 (continuation)

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	444	93	14	343	437	406	438	382	444	-	288	440	154	53	68	322
Weighted total	375	72	15	293	367	336	368	317	375	-	227	371	104	38	50	285
Packetpost	10	5	-	6	10	9	10	8	10	-	6	10	5	3	-	8
	3%	7%	-%	2%	3%	3%	3%	3%	3%	-%	3%	3%	5%	7%	-%	3%
		c												b		
PPI 2nd Class	5	1	-	4	5	4	5	5	5	-	4	5	2	*	2	2
	1%	1%	-%	1%	1%	1%	1%	2%	1%	-%	2%	1%	2%	1%	4%	1%
															c	
Presstream 2	4	2	-	2	4	2	4	2	4	-	2	4	*	-	-	4
	1%	2%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
PPI 1st Class	3	-	-	3	3	3	3	3	3	-	2	3	2	*	1	1
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	1%	3%	1%
Mailsort 3	3	2	-	*	3	2	3	2	3	-	2	3	-	-	*	2
	1%	3%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	1%	1%
		c														
Mailsort 2	2	2	-	-	2	2	2	2	2	-	2	2	-	-	-	2
	1%	3%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
		c														
Royal Mail International Bulk Mail	1	-	-	1	1	1	1	1	1	-	1	1	-	-	-	1
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
Packetsort	1	*	-	*	1	*	1	1	1	-	1	1	-	-	-	1
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
Sustainable Mail	1	*	-	*	1	1	1	1	1	-	1	1	-	-	-	1
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
Cleanmail	*	*	-	*	*	*	*	*	*	-	*	*	*	-	*	*
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%
Cleanmail Advance	*	*	-	*	*	*	*	*	*	-	*	*	*	-	*	*
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%
Responsible Mail	*	-	-	*	*	*	*	*	*	-	*	*	-	-	-	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
Cleanmail Plus	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Presstream 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Big Book and Royal Mail Heavyweight	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Walksort 1st Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Walksort 2nd Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mailsort 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 31 (continuation)

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	444	93	14	343	437	406	438	382	444	-	288	440	154	53	68	322
Weighted total	375	72	15	293	367	336	368	317	375	-	227	371	104	38	50	285
Mail Media	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (DO NOT READ OUT, PLEASE SPECIFY)	10	1	-	9	9	7	9	7	10	-	5	9	4	1	4	6
	3%	1%	-%	3%	2%	2%	2%	2%	3%	-%	2%	2%	4%	2%	7% c	2%
None of these (DO NOT READ OUT)	338	63	15	266	333	308	335	290	338	-	204	336	90	34	43	262
	90%	87%	100%	91%	91%	92%	91%	91%	90%	-%	90%	90%	86%	88%	86%	92%
Don't Know (DO NOT READ OUT)	5	*	-	5	3	3	3	3	5	-	2	5	2	1	1	2
	1%	1%	-%	2%	1%	1%	1%	1%	1%	-%	1%	1%	2%	2%	1%	1%
NET: Cleanmail	1	*	-	1	1	1	1	1	1	-	1	1	*	*	*	*
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Presstream	4	2	-	2	4	2	4	2	4	-	2	4	*	-	-	4
	1%	2%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
NET: Walksort	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Mailsort	3	2	-	*	3	2	3	2	3	-	2	3	-	-	*	2
	1%	3%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	1%	1%
		c														
NET: PPI	6	1	-	6	6	6	6	6	6	-	4	6	3	*	2	4
	2%	1%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	2%	1%	4%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Table 31 (continuation)

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	444	61	41	334	320	124	433	11	287	40	133	311	143	4
Weighted total	375	62	30	280	277	98	363	12	247	27	108	267	115	5
Packetpost	10	2	*	8	6	4	10	-	8	-	5	6	5	-
	3%	4%	2%	3%	2%	4%	3%	-%	3%	-%	4%	2%	5%	-%
PPI 2nd Class	5	*	2	3	2	3	5	-	3	-	3	1	2	*
	1%	*%	7%	1%	1%	3%	1%	-%	1%	-%	3%	1%	2%	4%
			c								b			
Presstream 2	4	-	3	*	2	2	4	-	3	*	*	3	2	-
	1%	-%	12%	*%	1%	2%	1%	-%	1%	1%	*%	1%	2%	-%
			ac											
PPI 1st Class	3	-	1	1	1	2	3	-	1	-	1	1	1	-
	1%	-%	5%	1%	*%	2%	1%	-%	1%	-%	1%	1%	1%	-%
			c											
Mailsort 3	3	*	2	-	2	*	3	-	2	*	-	3	*	-
	1%	1%	7%	-%	1%	*%	1%	-%	1%	1%	-%	1%	*%	-%
			c											
Mailsort 2	2	*	2	-	2	*	2	-	2	-	-	2	*	-
	1%	1%	6%	-%	1%	*%	1%	-%	1%	-%	-%	1%	*%	-%
			c											
Royal Mail International Bulk Mail	1	1	-	*	1	-	1	-	1	-	-	1	1	-
	*%	2%	-%	*%	1%	-%	*%	-%	1%	-%	-%	1%	1%	-%
		c												
Packetsort	1	*	-	*	1	-	1	-	1	-	-	1	1	-
	*%	*%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%	1%	-%
Sustainable Mail	1	1	-	-	*	*	1	-	*	-	-	1	1	-
	*%	1%	-%	-%	*%	*%	*%	-%	*%	-%	-%	*%	1%	-%
Cleanmail	*	-	-	*	*	*	*	-	*	-	*	*	*	-
	*%	-%	-%	*%	*%	*%	*%	-%	*%	-%	*%	*%	*%	-%
Cleanmail Advance	*	*	*	*	*	*	*	-	*	-	*	-	*	-
	*%	*%	1%	*%	*%	*%	*%	-%	*%	-%	*%	-%	*%	-%
Responsible Mail	*	*	-	-	*	-	*	-	*	-	-	*	*	-
	*%	*%	-%	-%	*%	-%	*%	-%	*%	-%	-%	*%	*%	-%
Cleanmail Plus	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Presstream 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Big Book and Royal Mail Heavyweight	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Walksort 1st Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Walksort 2nd Class	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 31 (continuation)

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QV8. Do you use any of the following Royal Mail products to send your bulk mailings?
Base: All respondents who send bulk mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	444	61	41	334	320	124	433	11	287	40	133	311	143	4
Weighted total	375	62	30	280	277	98	363	12	247	27	108	267	115	5
Mailsort 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mail Media	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (DO NOT READ OUT, PLEASE SPECIFY)	10	1	4	6	7	3	10	-	7	*	2	9	2	-
	3%	2%	12% ac	2%	3%	3%	3%	-%	3%	1%	1%	3%	2%	-%
None of these (DO NOT READ OUT)	338	56	20	261	254	85	328	10	221	24	98	241	99	4
	90%	91% b	67%	93% b	92%	86%	90%	85%	90%	89%	90%	90%	86%	96%
Don't Know (DO NOT READ OUT)	5	-	-	3	5	*	3	2	3	2	*	5	3	-
	1%	-%	-%	1%	2%	%	1%	15%	1%	7% a	%	2%	2%	-%
NET: Cleanmail	1	*	*	*	*	1	1	-	1	-	*	*	*	-
	%	%	1%	%	%	1%	%	-%	%	-%	%	%	%	-%
NET: Presstream	4	-	3	*	2	2	4	-	3	*	*	3	2	-
	1%	-%	12% ac	%	1%	2%	1%	-%	1%	1%	%	1%	2%	-%
NET: Walksort	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Mailsort	3	*	2	-	2	*	3	-	2	*	-	3	*	-
	1%	1%	7% c	-%	1%	%	1%	-%	1%	1%	-%	1%	%	-%
NET: PPI	6	*	2	4	2	4	6	-	4	-	3	3	2	*
	2%	%	8% ac	1%	1%	4% a	2%	-%	2%	-%	3%	1%	2%	4%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 31 (continuation)

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QV8. Do you use any of the following Royal Mail products to send your bulk mailings?
Base: All respondents who send bulk mail

Significance Level: 95%

Unweighted total

Weighted total

Packetpost

PPI 2nd Class

Presstream 2

PPI 1st Class

Mailsort 3

Mailsort 2

Royal Mail International

Bulk Mail

Packetsort

Sustainable Mail

Cleanmail

Cleanmail Advance

Responsible Mail

Cleanmail Plus

Presstream 1

Big Book and Royal Mail

Heavyweight

Walksort 1st Class

Walksort 2nd Class

Mailsort 1

Mail Media

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
444	154	124	94	72
375	132	116	66	61
10	9	1	*	1
3%	7%	1%	1%	1%
	bc			
5	2	*	3	-
1%	2%	*%	4%	-%
		b		
4	2	2	-	-
1%	1%	2%	-%	-%
3	1	*	1	-
1%	1%	*%	2%	-%
3	*	2	-	-
1%	*%	2%	-%	-%
2	-	2	-	-
1%	-%	2%	-%	-%
1	1	-	*	-
*%	1%	-%	*%	-%
1	-	*	-	*
*%	-%	*%	-%	1%
1	-	1	-	-
*%	-%	1%	-%	-%
*	*	-	*	-
*%	*%	-%	*%	-%
*	*	*	*	-
*%	*%	*%	*%	-%
*	-	*	-	-
*%	-%	*%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%

Produced by OLR

OFC1885

Issue date: 03/07/13

QV8. Do you use any of the following Royal Mail products to send your bulk mailings?

Base: All respondents who send bulk mail

Significance Level: 95%

Unweighted total

Weighted total

Other (DO NOT READ OUT,
PLEASE SPECIFY)

None of these (DO NOT
READ OUT)

Don't Know (DO NOT READ
OUT)

NET: Cleanmail

NET: Presstream

NET: Walksort

NET: Mailsort

NET: PPI

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
444	154	124	94	72
375	132	116	66	61
10	3	5	2	-
3%	2%	5%	3%	-%
338	112	107	61	58
90%	85%	92%	92%	95%
				a
5	2	*	*	2
1%	1%	-%	1%	4%
				b
1	*	*	*	-
-%	-%	-%	1%	-%
4	2	2	-	-
1%	1%	2%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
3	*	2	-	-
1%	-%	2%	-%	-%
6	3	*	3	-
2%	3%	-%	4%	-%

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

Letters
Other everyday
correspondence, such as
invoices, one off bills
etc.

Advertising and
promotional material,
such as catalogues,
brochures and direct
mail

Publications, such as
magazines, periodicals,
customer newsletters

Large letters

Parcels and packets

Bulk customer mailings,
such as bills,
statements, customer
packs etc.

Goods / business
supplies / large packets
ordered via lorry

Legal / accounts
documents / tax forms

Refused

None of these

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1560	92	172	112	110	113	267	185	202	86	85	74	62	1339
97%	96%	98%	100% d	94%	98%	96%	98%	97%	97%	98% d	99% d	98%	97%
1537	88	168	110	110	110	269	179	204	86	83	69	61	1323
96%	92%	95%	98%	94%	95%	97%	95%	98%	97%	95%	93%	97%	96%
1490	90	157	104	110	109	267	174	191	82	83	66	58	1283
93%	94%	89%	93%	94%	94%	96% bkl	92%	92%	92%	96% bk	89%	91%	93%
1403	81	159	90	102	101	256	172	174	71	79	62	55	1206
87%	85%	90%	81%	87%	87%	92% chik	91% cik	83%	81%	91% chik	83%	88%	87%
1346	72	145	99	101	95	236	156	181	73	73	62	53	1157
84%	75%	82%	89% a	86%	82%	85%	83%	87%	82%	84%	83%	84%	84%
1201	68	140	82	86	77	209	145	152	71	68	56	46	1031
75%	71%	80% e	74%	74%	67%	75%	77%	73%	80% e	78% e	75%	73%	75%
999	59	115	69	76	75	183	121	126	49	53	38	35	873
62%	62%	65% k	62%	65% k	65% k	66% kl	64% k	60%	55%	61% k	51%	55%	63% kl
4	2	-	-	-	-	2	-	-	-	*	-	-	4
*%	2% m	-%	-%	-%	-%	1%	-%	-%	-%	*%	-%	-%	*%
2	-	-	-	-	-	-	2	-	-	-	-	-	2
*%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	-	-	-	-	-	2	-	-	-	-	-	-	2
*%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	*%
3	-	2	-	-	1	-	-	-	-	-	-	-	3
*%	-%	1%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total

NET: (Large) Letters,
Parcels and packets

NET: Other mail

NET: None / DK / Ref

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1581	93	176	112	114	114	275	185	202	87	86	74	63	1359
99%	98%	100%	100%	98%	99%	99%	98%	97%	99%	99%	99%	99%	99%
1592	93	172	112	115	116	276	187	209	88	87	74	63	1369
99%	98%	98%	100%	99%	100%	99%	99%	100%	100%	100%	100%	99%	99%
										ab			
2	-	-	-	-	-	2	-	-	-	-	-	-	2
*%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	*%

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Table 32 (continuation)

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QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Letters

Other everyday
correspondence, such as
invoices, one off bills
etc.

Advertising and
promotional material,
such as catalogues,
brochures and direct
mail

Publications, such as
magazines, periodicals,
customer newsletters

Large letters

Parcels and packets

Bulk customer mailings,
such as bills,
statements, customer
packs etc.

Goods / business
supplies / large packets
ordered via lorry

Legal / accounts
documents / tax forms

Refused

None of these

Other

Don't know

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1560	1496	39	10	7	8	64	1113	447	1500	59	1072	289	105	93
97%	97%	100% a	100%	100%	100%	100% a	98%	96%	97%	100%	96%	100% a	100% a	98%
1537	1476	38	9	7	7	61	1095	442	1481	56	1048	289	105	94
96%	96% e	96% e	95%	96%	87%	95% e	96%	95%	96%	94%	94%	99% a	100% a	99% a
1490	1430	36	10	7	8	60	1050	440	1435	55	1025	277	99	89
93%	93%	93%	99%	94%	92%	94%	92%	95% a	93%	93%	92%	95%	94%	94%
1403	1344	36	10	7	7	59	992	411	1352	51	935	275	100	93
87%	87%	93% ae	99% ae	94% e	79%	92% ae	87%	89%	88%	85%	84%	95% a	95% a	98% a
1346	1286	37	9	7	7	59	970	376	1294	52	898	261	101	86
84%	84%	94% a	91%	93%	90%	93% a	85% b	81%	84%	88%	81%	90% a	96% ab	90% a
1201	1149	31	8	6	7	52	851	350	1149	52	779	253	84	85
75%	75%	79%	87% a	84%	79%	81% a	75%	75%	74%	88% a	70%	87% a	80% a	89% ac
999	955	28	7	4	4	44	703	295	966	33	658	192	79	69
62%	62% e	72% ae	76% ae	62%	48%	69% ae	62%	64%	63%	55%	59%	66% a	76% a	72% a
4	4	*	-	-	-	*	2	2	4	-	4	-	-	-
*%	*%	1%	-%	-%	-%	*%	*%	*%	*%	-%	*%	-%	-%	-%
2	2	-	-	-	-	-	2	-	-	2	-	2	-	-
*%	*%	-%	-%	-%	-%	-%	*%	-%	-%	3% a	-%	1% a	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	2	-	-	-	-	-	2	-	2	-	2	-	-	-
*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	*%	-%	-%	-%
3	3	-	-	-	-	-	3	-	3	-	3	-	-	-
*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	*%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

Significance Level: 95%
Unweighted total
Weighted total
NET: (Large) Letters,
Parcels and packets

NET: Other mail

NET: None / DK / Ref

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1581	1517	39	10	7	8	64	1131	450	1522	59	1092	289	105	95
99%	99%	100%	100%	100%	100%	100%	99%	97%	99%	100%	98%	100%	100%	100%
1592	1528	39	10	7	8	64	1130	463	1535	57	1101	291	105	95
99%	99%	100%	100%	100%	97%	100%	99%	100%	99%	97%	99%	100%	100%	100%
	e					e			b					
2	2	-	-	-	-	-	2	-	2	-	2	-	-	-
*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	*%	-%	-%	-%

Ofcom: Business Postal Tracker

Table 32 (continuation)

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QV9a. Which of the following types of mail does your organisation regularly receive at your location?
Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Letters	1560	680	312	236	216	78	29	10	1373	74	41	42	30	266	121	172	215
	97%	95%	100%	99%	99%	99%	100%	100%	97%	99%	96%	97%	100%	97%	99%	96%	99%
			a	a	a	a	a										a
Other everyday correspondence, such as invoices, one off bills etc.	1537	661	309	235	214	78	29	10	1348	74	43	43	29	271	120	177	214
	96%	92%	99%	98%	99%	100%	99%	100%	95%	98%	100%	99%	98%	99%	98%	99%	99%
			a	a	a	a	a										
Advertising and promotional material, such as catalogues, brochures and direct mail	1490	658	294	224	205	73	27	8	1308	71	41	41	29	256	119	164	211
	93%	92%	94%	94%	94%	94%	94%	80%	93%	94%	96%	95%	97%	94%	97%	92%	97%
																	a
Publications, such as magazines, periodicals, customer newsletters	1403	588	284	217	202	76	27	10	1219	74	43	40	27	251	119	159	211
	87%	82%	91%	91%	93%	97%	93%	99%	86%	99%	99%	94%	91%	92%	97%	89%	97%
			a	a	abc	a	a			ae	a						a
Large letters	1346	549	270	213	207	71	28	8	1172	69	39	39	27	241	107	152	196
	84%	76%	87%	89%	95%	90%	97%	87%	83%	93%	90%	91%	90%	88%	87%	85%	90%
			a	abc	a	abc	a			a	a						
Parcels and packets	1201	478	246	198	178	69	24	8	1034	66	38	36	27	234	104	147	191
	75%	66%	79%	83%	82%	88%	83%	87%	73%	88%	88%	83%	91%	85%	85%	82%	88%
			a	a	a	ab	a			a	a		a				
Bulk customer mailings, such as bills, statements, customer packs etc.	999	392	223	164	143	51	20	4	863	55	28	33	20	205	88	131	162
	62%	55%	72%	69%	66%	66%	69%	45%	61%	73%	65%	76%	69%	75%	72%	73%	75%
			a	a	a	a	a			a		a					
Goods / business supplies / large packets ordered via lorry	4	2	-	2	*	-	-	-	4	*	-	-	-	-	-	-	-
	*%	*%	-%	1%	*%	-%	-%	-%	*%	*%	-%	-%	-%	-%	-%	-%	-%
Legal / accounts documents / tax forms	2	-	-	-	2	-	-	-	-	2	-	-	-	2	-	2	-
	*%	-%	-%	-%	1%	-%	-%	-%	-%	2%	-%	-%	-%	1%	-%	1%	-%
					a					a							
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of these	2	2	-	-	-	-	-	-	2	-	-	-	-	-	-	-	-
	*%	*%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%
Other	3	-	1	-	2	-	-	-	1	2	-	-	-	2	-	-	2
	*%	-%	*%	-%	1%	-%	-%	-%	*%	3%	-%	-%	-%	1%	-%	-%	1%
					a					a							

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Ofcom: Business Postal Tracker

Table 32 (continuation)

Page 327

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																	
Unweighted total	1604	a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Weighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Don't know	-	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
	-%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: (Large) Letters, Parcels and packets	1581	698	312	239	216	78	29	10	1392	75	43	42	30	271	121	178	215
	99%	97%	100%	100%	99%	100%	100%	100%	99%	100%	100%	97%	100%	99%	99%	99%	99%
		a	a	a	a												
NET: Other mail	1592	709	312	239	216	78	29	10	1402	75	43	43	30	274	123	179	217
	99%	99%	100%	100%	99%	100%	100%	100%	99%	100%	100%	100%	100%	100%	100%	100%	100%
		a															
NET: None / DK / Ref	2	2	-	-	-	-	-	-	2	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Table 32 (continuation)

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Weighted total	1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
Letters	1560	781	276	490	1453	898	1479	716	372	1238	658	1452	229	1171	1053
	97%	96%	98%	99% a	98%	99% def	98%	98%	96%	98%	98%	98%	98%	98%	98%
Other everyday correspondence, such as invoices, one off bills etc.	1537	760	276	491	1426	891	1450	718	375	1239	657	1426	231	1157	1044
	96%	94%	98% a	99% a	97%	99% ac	96%	98% ac	99% ac	98%	98% b	96%	99% b	97%	97%
Advertising and promotional material, such as catalogues, brochures and direct mail	1490	755	268	460	1385	859	1408	690	361	1199	631	1385	221	1118	1017
	93%	93%	95%	92%	94%	95%	94%	95%	95%	95%	94%	94%	94%	94%	95%
Publications, such as magazines, periodicals, customer newsletters	1403	681	251	462	1317	832	1337	680	357	1131	617	1311	218	1074	967
	87%	84%	89% a	93% a	89%	92% acf	89%	93% acf	94% acf	89%	92% b	89%	93% b	90%	90%
Large letters	1346	644	242	456	1258	846	1284	669	341	1104	625	1258	214	1048	917
	84%	79%	86% a	92% ab	85%	94% acbf	85%	92% acf	90% ac	87%	93% b	85%	92% b	88%	85%
Parcels and packets	1201	559	232	402	1130	734	1147	654	322	973	583	1126	197	914	826
	75%	69%	82% a	81% a	76%	81% acf	76%	90% abcbef	85% acf	77%	87% b	76%	84% b	77%	77%
Bulk customer mailings, such as bills, statements, customer packs etc.	999	496	189	308	939	604	952	517	282	830	470	942	166	761	704
	62%	61%	67%	62%	64%	67%	63%	71% acf	74% abcbf	65%	70% b	64%	71% b	64%	65%
Goods / business supplies / large packets ordered via lorry	4	4	*	-	4	2	4	2	-	2	2	4	2	4	*
	1%	1%	1%	0%	1%	1%	1%	1%	0%	1%	1%	1%	1%	1%	1%
Legal / accounts documents / tax forms	2	-	-	2	2	2	2	2	-	2	2	2	-	2	2
	1%	0%	0%	1%	1%	1%	1%	1%	0%	1%	1%	1%	0%	1%	1%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
None of these	2	2	-	-	-	-	-	-	-	2	-	-	-	-	-
	1%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%
Other	3	1	-	2	3	3	3	2	3	3	3	3	2	1	3
	1%	1%	0%	1%	1%	1%	1%	1% ac	1%	1%	1%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Don't know

NET: (Large) Letters,

Parcels and packets

NET: Other mail

NET: None / DK / Ref

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1581	790	280	498	1463	901	1489	727	376	1253	667	1466	234	1181	1067
99%	97%	99%	100%	99%	100%	99%	100%	99%	99%	100%	99%	100%	99%	99%
	a	a	a	f	f	f	f	f	f					
1592	802	282	495	1471	904	1497	728	380	1265	667	1472	234	1189	1070
99%	99%	100%	100%	100%	100%	100%	100%	100%	100%	100%	99%	100%	100%	99%
2	2	-	-	-	-	-	-	-	2	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Base: All respondents

Other

*% 1% -% *% *% *% *% *% *% -% *% *% 1% -% 1% *%

c

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Don't know

-

NET: (Large) Letters,

Parcels and packets

NET: Other mail

NET: None / DK / Ref

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100%

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2

100%

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2

100%

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2

100%

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Ofcom: Business Postal Tracker

Table 32 (continuation)

Page 332

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
		a	b	c	a	b	a	b	a	b	a	b	a	b
Significance Level: 95%														
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
Letters	1560	204	101	1243	1072	488	1457	103	1010	117	383	1143	367	8
	97%	99%	97%	97%	98%	96%	97%	96%	97%	95%	97%	97%	95%	100%
Other everyday correspondence, such as invoices, one off bills etc.	1537	201	104	1221	1059	478	1439	98	1004	115	380	1125	369	8
	96%	98%	100%	95%	97%	94%	96%	91%	97%	94%	96%	96%	98%	100%
Advertising and promotional material, such as catalogues, brochures and direct mail	1490	196	97	1184	1035	455	1390	100	957	118	373	1085	356	8
	93%	95%	94%	92%	94%	89%	93%	93%	92%	96%	94%	92%	95%	100%
Publications, such as magazines, periodicals, customer newsletters	1403	197	98	1095	993	409	1331	72	906	111	342	1029	348	8
	87%	96%	94%	85%	91%	80%	89%	67%	87%	90%	87%	88%	93%	99%
Large letters	1346	189	93	1052	954	392	1275	70	866	104	347	968	335	6
	84%	92%	89%	82%	87%	77%	85%	66%	83%	84%	88%	82%	89%	78%
Parcels and packets	1201	188	95	908	844	357	1138	63	766	97	331	842	317	7
	75%	91%	91%	71%	77%	70%	76%	59%	74%	79%	84%	72%	84%	84%
Bulk customer mailings, such as bills, statements, customer packs etc.	999	144	62	784	728	271	956	43	620	84	267	709	279	6
	62%	70%	60%	61%	66%	53%	64%	40%	60%	68%	68%	60%	74%	76%
Goods / business supplies / large packets ordered via lorry	4	-	2	2	4	*	4	-	2	2	2	2	-	-
	*%	-%	2%	*%	*%	*%	*%	-%	*%	1%	*%	*%	-%	-%
Legal / accounts documents / tax forms	2	-	-	2	2	-	2	-	-	-	2	-	2	-
	*%	-%	-%	*%	*%	-%	*%	-%	-%	-%	*%	-%	*%	-%
Refused	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
None of these	2	-	-	2	-	2	2	-	2	-	-	2	-	-
	*%	-%	-%	*%	-%	*%	*%	-%	*%	-%	-%	*%	-%	-%
Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b														

Ofcom: Business Postal Tracker

Table 32 (continuation)

Page 333

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	1038	123	395	1175	376	8
Other	3	2	-	1	1	2	3	2	-	2	1	2	-
	1%	1%	-%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%
	c												
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: (Large) Letters, Parcels and packets	1581	206	102	1260	1084	498	1477	1019	121	389	1158	373	8
	99%	100%	99%	98%	99%	98%	99%	98%	98%	98%	99%	99%	100%
NET: Other mail	1592	206	104	1270	1090	502	1485	1035	123	391	1167	376	8
	99%	100%	100%	99%	100%	99%	99%	100%	100%	99%	99%	100%	100%
				b									
NET: None / DK / Ref	2	-	-	2	-	2	2	2	-	-	2	-	-
	1%	-%	-%	1%	-%	1%	1%	1%	-%	-%	1%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 32 (continuation)

Page 334

QV9a. Which of the following types of mail does your organisation regularly receive at your location?
Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

Letters

 Other everyday
correspondence, such as
invoices, one off bills
etc.

 Advertising and
promotional material,
such as catalogues,
brochures and direct
mail

 Publications, such as
magazines, periodicals,
customer newsletters

Large letters

Parcels and packets

 Bulk customer mailings,
such as bills,
statements, customer
packs etc.

 Goods / business
supplies / large packets
ordered via lorry

 Legal / accounts
documents / tax forms

Refused

None of these

Other

Don't know

 NET: (Large) Letters,
Parcels and packets

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1560	378	389	404	388
97%	97%	97%	99%	97%
1537	376	388	396	377
96%	96%	96%	97%	94%
1490	364	377	374	374
93%	93%	94%	91%	94%
1403	356	357	347	342
87%	91%	89%	85%	86%
1346	330	343	358	314
84%	84%	85%	87%	79%
1201	295	298	300	307
75%	75%	74%	73%	77%
999	266	283	249	201
62%	68%	70%	61%	51%
4	2	-	2	-
*%	*%	-%	*%	-%
2	2	-	-	-
*%	*%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
2	-	2	-	-
*%	-%	*%	-%	-%
3	1	-	2	-
*%	*%	-%	1%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
1581	385	393	410	394
99%	98%	97%	100%	99%
			ab	

Produced by OLR

OFC1885

Issue date: 03/07/13

QV9a. Which of the following types of mail does your organisation regularly receive at your location?

Base: All respondents

Significance Level: 95%

Unweighted total

Weighted total

NET: Other mail

NET: None / DK / Ref

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1592	390	400	407	396
99%	99%	99%	99%	99%
2	-	2	-	-
*%	-%	*%	-%	-%

Table 33
QV9b1. Which of the following types of services does each of the types of mail you receive fall into? So for: Letters
Base: All respondents who receive LETTERS at their location

Significance Level: 95%
Unweighted total
Weighted total
Standard delivery

Tracked service (send /
receive mail for which
you need to be able to
monitor its progress
through the postal
system)

International delivery

Timed delivery (send /
receive mail which is
guaranteed to arrive by
a specific time, e.g. by
9am next day or 1pm next
day delivery)

Urgent delivery (send /
receive mail that needs
to arrive rapidly)

Cross-Border Delivery

Other (PLEASE SPECIFY)

None of these (DO NOT
READ OUT)

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1571	a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	64	104	78	114	112	199	128	114	85	211	191	171	998
Weighted total	92	172	112	110	113	267	185	202	86	85	74	62	1339
Standard delivery	1524	88	166	106	110	112	264	179	200	85	84	71	1309
98%	96%	96%	95%	100%	99%	99%	97%	99%	98%	99%	97%	97%	98%
				c									
298	15	31	21	24	24	56	39	30	17	15	14	14	256
19%	16%	18%	19%	22%	21%	21%	21%	15%	20%	17%	19%	22%	19%
International delivery	272	10	27	30	21	20	58	35	27	9	13	9	236
17%	10%	16%	26%	19%	16%	22%	19%	14%	10%	15%	13%	24%	18%
			ahijk			aik						ahijk	
197	9	19	12	19	15	46	26	20	8	8	6	8	176
13%	10%	11%	10%	18%	14%	17%	14%	10%	9%	9%	8%	12%	13%
				jk		jk							k
176	7	23	12	19	12	34	19	22	7	7	5	9	154
11%	8%	13%	11%	18%	11%	13%	10%	11%	8%	9%	7%	15%	12%
				ijk								k	
Cross-Border Delivery	21	-	-	-	-	-	-	-	-	-	-	21	-
1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	33%	-%
												abcdefgh ijk	
Other (PLEASE SPECIFY)	12	2	-	1	-	5	-	-	1	*	*	1	10
1%	2%	-%	-%	1%	-%	2%	-%	-%	2%	1%	1%	2%	1%
None of these (DO NOT READ OUT)	2	-	-	-	-	2	-	-	-	-	-	*	2
*%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	*%	*%
Don't Know (DO NOT READ OUT)	11	-	2	*	1	*	2	-	1	-	1	1	9
1%	-%	1%	2%	*%	1%	*%	1%	-%	2%	-%	2%	2%	1%
											j		

Ofcom: Business Postal Tracker

Table 33 (continuation)

Page 337

QV9b1. Which of the following types of services does each of the types of mail you receive fall into? So for: Letters

Base: All respondents who receive LETTERS at their location

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1571	1178	243	55	42	53	393	1077	494	1445	126	987	309	127	148
Weighted total	1560	1496	39	10	7	8	64	1113	447	1500	59	1072	289	105	93
Standard delivery	1524	1462	38	10	7	8	63	1088	436	1465	59	1047	286	101	89
	98%	98%	98%	100%	100%	96%	98%	98%	98%	98%	100%	98%	99%	96%	96%
													d		
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	298	277	12	5	2	3	22	215	83	280	18	171	72	30	25
	19%	19%	31%	48%	31%	32%	34%	19%	19%	19%	30%	16%	25%	28%	27%
			a	abf	a	a	a				a		a	a	a
International delivery	272	255	10	4	2	2	18	198	75	265	8	143	68	34	28
	17%	17%	25%	39%	29%	22%	27%	18%	17%	18%	13%	13%	23%	33%	30%
			a	ab	a		a						a	ab	a
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	197	183	8	2	2	1	14	139	58	182	15	94	61	25	16
	13%	12%	20%	24%	32%	18%	22%	13%	13%	12%	25%	9%	21%	24%	18%
			a	a	a		a				a		a	a	a
Urgent delivery (send / receive mail that needs to arrive rapidly)	176	164	7	2	2	1	12	133	43	165	11	89	49	25	13
	11%	11%	16%	23%	22%	17%	19%	12%	10%	11%	19%	8%	17%	24%	14%
			a	a	a		a				a		a	ad	a
Cross-Border Delivery	21	18	2	*	*	*	3	9	12	20	*	13	4	2	2
	1%	1%	5%	3%	5%	3%	4%	1%	3%	1%	1%	1%	1%	2%	2%
			a				a		a						
Other (PLEASE SPECIFY)	12	12	-	-	-	-	-	10	2	12	-	4	4	2	2
	1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-%	1%	1%	2%	2%
									*			*	a		a
None of these (DO NOT READ OUT)	2	2	-	-	-	*	*	2	-	2	*	2	-	-	-
	1%	1%	-%	-%	-%	1%	1%	1%	-%	1%	1%	1%	-%	-%	-%
						a									
Don't Know (DO NOT READ OUT)	11	11	*	-	-	*	1	11	1	11	-	9	2	*	*
	1%	1%	1%	-%	-%	2%	1%	1%	1%	1%	-%	1%	1%	1%	1%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 33 (continuation)

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QV9b1. Which of the following types of services does each of the types of mail you receive fall into? So for: Letters

Base: All respondents who receive LETTERS at their location

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	1571	a	b	c	d	e	f	a	b	c	d	e	a	b	a	b
Weighted total	1560	593	306	218	244	119	78	1335	93	52	50	41	286	115	192	210
		680	312	236	216	78	29	1373	74	41	42	30	266	121	172	215
Standard delivery	1524	665	306	230	212	75	28	1344	70	40	41	29	262	117	169	211
	98%	98%	98%	97%	98%	97%	98%	98%	94%	96%	99%	99%	99%	97%	98%	98%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	298	86	71	46	62	19	14	249	19	8	11	11	64	27	51	39
	19%	13%	23%	19%	29%	24%	48%	16%	26%	20%	27%	36%	24%	22%	30%	18%
		a	a	ac	a	abcde						a			b	
International delivery	272	87	53	53	54	12	11	213	18	12	16	14	71	38	55	55
	17%	13%	17%	22%	25%	15%	38%	16%	24%	29%	38%	46%	27%	32%	32%	26%
				a	abe		abcde		a	a	a	ab				
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	197	61	46	25	38	12	11	164	16	5	5	8	39	20	31	28
	13%	9%	15%	11%	18%	15%	39%	12%	21%	12%	12%	26%	15%	17%	18%	13%
			a		ac	a	abcde		a			a				
Urgent delivery (send / receive mail that needs to arrive rapidly)	176	56	41	22	33	11	12	147	13	5	9	3	33	21	26	28
	11%	8%	13%	10%	15%	15%	42%	11%	17%	13%	20%	10%	12%	17%	15%	13%
		a	a		a	a	abcde				a					
Cross-Border Delivery	21	7	3	2	5	2	2	17	*	1	1	1	3	1	4	1
	1%	1%	1%	1%	2%	3%	5%	1%	%	3%	3%	2%	1%	1%	2%	1%
							abc									
Other (PLEASE SPECIFY)	12	2	-	5	2	*	-	9	*	2	*	-	2	2	2	2
	1%	%	-%	2%	1%	1%	-%	1%	1%	4%	1%	-%	1%	2%	1%	1%
				ab						a						
None of these (DO NOT READ OUT)	2	*	-	2	-	-	-	*	2	-	-	-	-	-	-	-
	%	%	-%	1%	-%	-%	-%	%	2%	-%	-%	-%	-%	-%	-%	-%
			a						a							
Don't Know (DO NOT READ OUT)	11	6	1	2	1	-	1	11	*	-	-	*	*	*	*	*
	1%	1%	%	1%	1%	-%	2%	1%	%	-%	-%	1%	%	%	%	%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 33 (continuation)

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QV9b1. Which of the following types of services does each of the types of mail you receive fall into? So for: Letters

Base: All respondents who receive LETTERS at their location

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%														
Unweighted total														
Weighted total														
Standard delivery														
98%														
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)														
298														
19%														
International delivery														
272														
17%														
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)														
197														
13%														
Urgent delivery (send / receive mail that needs to arrive rapidly)														
176														
11%														
Cross-Border Delivery														
21														
1%														
Other (PLEASE SPECIFY)														
12														
1%														
None of these (DO NOT READ OUT)														
2														
0%														
Don't Know (DO NOT READ OUT)														
11														
1%														

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 33 (continuation)

Page 340

QV9b1. Which of the following types of services does each of the types of mail you receive fall into? So for: Letters

Base: All respondents who receive LETTERS at their location

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1571	272	34	1241	1571	1370	1571	1211	1564	-	913	1557	402	156	238	1174
Weighted total	1560	257	35	1248	1560	1339	1560	1181	1552	-	881	1548	351	144	234	1179
Standard delivery	1524	246	33	1222	1524	1306	1524	1149	1517	-	858	1524	343	139	225	1156
	98%	96%	95%	98%	98%	98%	98%	97%	98%	-%	97%	96%	98%	97%	96%	98%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	298	58	7	231	298	287	298	272	298	-	298	296	153	33	46	219
	19%	22%	19%	19%	19%	21%	19%	23%	19%	-%	34%	19%	44%	23%	20%	19%
								ac			b		ab			
International delivery	272	46	7	216	272	256	272	239	272	-	228	272	272	36	41	193
	17%	18%	20%	17%	17%	19%	17%	20%	18%	-%	26%	18%	78%	25%	18%	16%
											b		ab	c		
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	197	40	6	151	197	187	197	182	197	-	197	197	105	24	32	140
	13%	16%	17%	12%	13%	14%	13%	15%	13%	-%	22%	13%	30%	17%	14%	12%
								ac			b		ab			
Urgent delivery (send / receive mail that needs to arrive rapidly)	176	34	4	138	176	168	176	163	176	-	176	176	108	21	22	134
	11%	13%	11%	11%	11%	13%	11%	14%	11%	-%	20%	11%	31%	14%	9%	11%
								ac			b		ab			
Cross-Border Delivery	21	4	1	15	21	19	21	17	21	-	17	21	21	1	4	16
	1%	2%	3%	1%	1%	1%	1%	1%	1%	-%	2%	1%	6%	1%	2%	1%
													ab			
Other (PLEASE SPECIFY)	12	3	-	9	12	12	12	11	12	-	8	10	4	5	*	6
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	3%	-%	1%
														bc		
None of these (DO NOT READ OUT)	2	2	-	*	2	2	2	2	2	-	*	2	-	2	-	*
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	1%	-%	1%
		c												c		
Don't Know (DO NOT READ OUT)	11	2	-	10	11	9	11	9	11	-	5	4	1	1	4	7
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	2%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 33 (continuation)

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QV9b1. Which of the following types of services does each of the types of mail you receive fall into? So for: Letters

Base: All respondents who receive LETTERS at their location

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1571	188	99	1264	1083	488	1468	103	1039	116	382	1151	381	10
Weighted total	1560	204	101	1243	1072	488	1457	103	1010	117	383	1143	367	8
Standard delivery	1524	196	97	1219	1046	479	1422	103	987	115	372	1119	361	8
	98%	96%	96%	98%	98%	98%	98%	100%	98%	98%	97%	98%	98%	100%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	298	50	30	213	218	80	283	15	177	29	102	189	80	3
	19%	25%	30%	17%	20%	16%	19%	15%	18%	25%	27%	17%	22%	42%
		c	c								b			
International delivery	272	52	24	195	201	72	263	10	189	16	74	192	102	1
	17%	26%	24%	16%	19%	15%	18%	9%	19%	14%	19%	17%	28%	18%
		c	c				b							
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	197	33	15	147	144	53	189	8	126	17	53	140	52	3
	13%	16%	14%	12%	13%	11%	13%	8%	12%	15%	14%	12%	14%	42%
Urgent delivery (send / receive mail that needs to arrive rapidly)	176	30	10	135	135	41	172	5	119	12	46	129	47	2
	11%	15%	10%	11%	13%	8%	12%	4%	12%	10%	12%	11%	13%	20%
					b		b							
Cross-Border Delivery	21	2	*	17	14	6	20	1	13	1	5	15	4	-
	1%	1%	%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	-%
Other (PLEASE SPECIFY)	12	5	1	5	8	4	12	-	8	2	6	5	4	-
	1%	3%	1%	%	1%	1%	1%	-%	1%	2%	2%	%	1%	-%
		c									b			
None of these (DO NOT READ OUT)	2	-	-	2	*	2	2	-	2	-	-	2	-	-
	%	-%	-%	%	%	%	%	-%	%	-%	-%	%	-%	-%
Don't Know (DO NOT READ OUT)	11	2	2	8	10	2	11	*	4	-	4	8	*	-
	1%	1%	2%	1%	1%	%	1%	%	%	-%	1%	1%	%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 33 (continuation)

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QV9b1. Which of the following types of services does each of the types of mail you receive fall into? So for: Letters

Base: All respondents who receive LETTERS at their location

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
		a	b	c	d
Significance Level: 95%					
Unweighted total	1571	394	401	399	377
Weighted total	1560	378	389	404	388
Standard delivery	1524	371	378	396	379
	98%	98%	97%	98%	98%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	298	93	74	78	53
	19%	25% d	19%	19% d	14%
International delivery	272	80	75	70	47
	17%	21% d	19% d	17% d	12%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	197	52	52	59	34
	13%	14% d	13% d	15% d	9%
Urgent delivery (send / receive mail that needs to arrive rapidly)	176	46	43	47	40
	11%	12%	11%	12%	10%
Cross-Border Delivery	21	2	5	7	6
	1%	1%	1%	2%	2%
Other (PLEASE SPECIFY)	12	8	2	*	1
	1%	2% cd	1%	*%	*%
None of these (DO NOT READ OUT)	2	2	-	*	-
	*%	*%	-%	*%	-%
Don't Know (DO NOT READ OUT)	11	3	2	4	2
	1%	1%	1%	1%	1%

Columns Tested: a,b,c,d

Table 34
QV9b2. Which of the following types of services does each of the types of mail you receive fall into? So for: Large letters
Base: All respondents who receive LARGE LETTERS at their location

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1376	51	88	70	104	97	178	111	103	74	185	164	151	876
Weighted total	1346	72	145	99	101	95	236	156	181	73	73	62	53	1157
Standard delivery	1295	68	143	94	100	89	226	151	176	66	72	59	51	1113
	96%	95%	99%	95%	100%	94%	95%	97%	98%	91%	98%	94%	96%	96%
			i		acefik						i			i
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	231	11	28	10	13	14	58	30	23	12	11	11	11	198
	17%	15%	19%	10%	13%	15%	24%	19%	13%	17%	15%	17%	21%	17%
							cdhjm							
International delivery	190	6	22	21	15	7	36	24	23	9	9	6	13	163
	14%	8%	15%	21%	15%	8%	15%	16%	13%	12%	12%	9%	25%	14%
				ek									aethijkm	
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	164	9	16	10	10	6	45	22	18	6	7	7	8	142
	12%	13%	11%	10%	10%	6%	19%	14%	10%	9%	9%	11%	15%	12%
							eijm						e	
Urgent delivery (send / receive mail that needs to arrive rapidly)	137	7	16	12	11	2	34	19	13	4	6	7	7	117
	10%	10%	11%	12%	11%	2%	14%	12%	7%	5%	8%	11%	14%	10%
		e	e	e	e		ei	e			e	e	e	e
Cross-Border Delivery	17	-	-	-	-	-	-	-	-	-	-	-	17	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	31%	-%
													abcdefghijklm	
Other (PLEASE SPECIFY)	7	4	-	-	-	-	2	-	-	-	*	*	*	6
	1%	5%	-%	-%	-%	-%	1%	-%	-%	-%	1%	1%	1%	*%
		bdefghjkm												
None of these (DO NOT READ OUT)	4	*	-	-	-	1	2	-	-	-	-	-	1	3
	*%	*%	-%	-%	-%	1%	1%	-%	-%	-%	-%	-%	1%	*%
Don't Know (DO NOT READ OUT)	15	*	-	4	*	3	2	2	2	1	-	1	1	14
	1%	*%	-%	4%	*%	3%	1%	1%	1%	2%	-%	2%	1%	1%
				j		j								
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 34 (continuation)

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QV9b2. Which of the following types of services does each of the types of mail you receive fall into? So for: Large letters

Base: All respondents who receive LARGE LETTERS at their location

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1376	1009	229	50	40	48	367	954	422	1261	115	831	282	122	141
Weighted total	1346	1286	37	9	7	7	59	970	376	1294	52	898	261	101	86
Standard delivery	1295	1237	36	9	6	7	58	933	362	1245	50	864	254	93	84
	96%	96%	98%	99%	98%	95%	98%	96%	96%	96%	95%	96%	97%	92%	98%
													c		c
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	231	213	9	4	3	2	19	175	56	214	17	123	62	29	18
	17%	17%	25%	49%	46%	29%	31%	18%	15%	17%	33%	14%	24%	29%	21%
			a	abf	ab	a	a				a		a	a	a
International delivery	190	175	8	3	2	1	15	139	51	187	3	90	48	31	21
	14%	14%	23%	38%	35%	17%	26%	14%	14%	14%	7%	10%	18%	30%	25%
			a	abe	ae		a			b			a	ab	a
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	164	153	6	2	2	1	11	119	45	153	11	78	52	17	17
	12%	12%	17%	28%	27%	10%	19%	12%	12%	12%	21%	9%	20%	16%	19%
			a	ae	ae		a				a		a	a	a
Urgent delivery (send / receive mail that needs to arrive rapidly)	137	125	6	2	2	1	11	97	40	128	9	63	45	15	14
	10%	10%	17%	26%	26%	14%	19%	10%	11%	10%	17%	7%	17%	15%	16%
			a	a	a		a				a		a	a	a
Cross-Border Delivery	17	14	2	*	*	*	3	8	9	16	*	11	3	1	2
	1%	1%	5%	4%	5%	3%	4%	1%	2%	1%	1%	1%	1%	1%	2%
			a		a		a		a						
Other (PLEASE SPECIFY)	7	7	-	-	-	*	*	3	4	7	-	3	2	*	2
	1%	1%	-%	-%	-%	2%	*%	*%	1%	1%	-%	*%	1%	*%	2%
						b									a
None of these (DO NOT READ OUT)	4	4	*	-	-	*	*	2	2	4	*	3	-	*	-
	*%	*%	*%	-%	-%	1%	*%	*%	1%	*%	*%	*%	-%	*%	-%
Don't Know (DO NOT READ OUT)	15	15	*	-	-	*	*	12	3	15	-	13	2	*	-
	1%	1%	1%	-%	-%	3%	1%	1%	1%	1%	-%	1%	1%	*%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 34 (continuation)

QV9b2. Which of the following types of services does each of the types of mail you receive fall into? So for: Large letters

Base: All respondents who receive LARGE LETTERS at their location

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	1376							1156	84	49	48	39	264	105	175	195
Weighted total	1346							1172	69	39	39	27	241	107	152	196
Standard delivery	1295							1127	69	35	39	26	230	105	143	192
	96%	95%	96%	96%	98%	100%	96%	96%	99%	89%	99%	99%	95%	98%	94%	98%
					a			c	c		c					a
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	231							189	19	8	8	6	42	18	31	29
	17%	11%	18%	18%	27%	18%	43%	16%	28%	22%	19%	24%	18%	17%	21%	15%
		a	a	abc	a	abcde			a							
International delivery	190							140	16	10	12	13	51	27	38	40
	14%	11%	13%	16%	22%	7%	28%	12%	23%	26%	31%	47%	21%	25%	25%	20%
			e	abe		abce			a	a	a	abc				
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	164							128	17	6	5	7	37	16	30	24
	12%	9%	11%	9%	21%	12%	32%	11%	25%	16%	13%	28%	15%	15%	19%	12%
				abce		abcde			a			a				
Urgent delivery (send / receive mail that needs to arrive rapidly)	137							109	13	2	7	5	22	19	19	22
	10%	7%	11%	9%	16%	7%	32%	9%	19%	5%	19%	20%	9%	18%	13%	11%
				ace		abcde			ac		ac	ac		a		
Cross-Border Delivery	17							14	*	*	1	1	3	1	3	1
	1%	1%	1%	1%	2%	2%	2%	1%	1%	1%	4%	3%	1%	1%	2%	1%
Other (PLEASE SPECIFY)	7							4	1	2	*	-	4	-	4	-
	1%	1%	1%	1%	1%	1%	21%	1%	1%	5%	1%	-	1%	-	2%	-
										a					b	
None of these (DO NOT READ OUT)	4							4	-	-	-	-	-	*	-	*
	1%	1%	-	-	-	-	2%	1%	-	-	-	-	-	1%	-	1%
							bd									
Don't Know (DO NOT READ OUT)	15							15	*	-	-	-	*	-	*	-
	1%	2%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%
		b														

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 34 (continuation)

QV9b2. Which of the following types of services does each of the types of mail you receive fall into? So for: Large letters

Base: All respondents who receive LARGE LETTERS at their location

Significance Level: 95%

Unweighted total

Weighted total

Standard delivery

Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)

International delivery

Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)

Urgent delivery (send / receive mail that needs to arrive rapidly)

Cross-Border Delivery

Other (PLEASE SPECIFY)

None of these (DO NOT READ OUT)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1376	635	262	475	1295	910	1316	715	415	1122	657	1297	280	1079	969
1346	644	242	456	1258	846	1284	669	341	1104	625	1258	214	1048	917
1295	621	227	445	1214	816	1237	642	336	1066	596	1213	210	1015	887
96%	96%	94%	98% b	96%	96%	96%	96%	98% acd	97%	95%	96%	98%	97%	97%
231	79	55	95	223	188	225	149	76	191	157	223	74	211	180
17%	12%	23% a	21% a	18%	22% acf	18%	22% acf	22% acf	17%	25% b	18%	34% ab	20%	20%
190	72	32	86	183	141	183	135	63	150	139	184	122	164	149
14%	11%	13%	19% ab	15%	17% f	14%	20% acf	18% cf	14%	22% b	15%	57% ab	16%	16%
164	60	33	71	157	138	159	114	62	133	124	157	56	147	124
12%	9%	14%	15% a	12%	16% acf	12%	17% acf	18% acf	12%	20% b	12%	26% ab	14%	14%
137	45	31	61	134	114	134	90	55	108	106	131	57	124	110
10%	7%	13% a	13% a	11%	13% acf	10%	13% cf	16% acf	10%	17% b	10%	27% ab	12%	12%
17	8	3	6	16	10	16	8	5	13	9	15	13	12	12
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	6% ab	1%	1%
7	3	-	4	7	6	7	6	-	5	5	7	2	5	6
1%	*%	-%	1%	1%	1%	1%	1% e	-%	*%	1%	1%	1%	*%	1%
4	3	*	*	3	1	3	1	-	2	2	3	*	2	2
*%	*%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	*%	*%	*%
15	9	3	3	15	9	15	8	1	15	5	15	1	9	11
1%	1%	1%	1%	1%	1%	1%	1%	*%	1% e	1%	1%	1%	1%	1%

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Table 34 (continuation)

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QV9b2. Which of the following types of services does each of the types of mail you receive fall into? So for: Large letters

Base: All respondents who receive LARGE LETTERS at their location

Significance Level: 95%

Unweighted total

Weighted total

Standard delivery

Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)

International delivery

Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)

Urgent delivery (send / receive mail that needs to arrive rapidly)

Cross-Border Delivery

Other (PLEASE SPECIFY)

None of these (DO NOT READ OUT)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1376	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
248	248	33	1078	1370	1376	1376	1145	1375	-	873	1365	384	144	207	1023
1346	231	35	1062	1339	1346	1346	1104	1346	-	838	1337	333	132	194	1017
1295	226	35	1019	1288	1295	1295	1064	1295	-	801	1295	326	126	183	984
96%	98%	100%	96%	96%	96%	96%	96%	96%	-%	96%	97%	a	95%	94%	97%
231	49	5	177	231	231	231	210	231	-	231	229	121	31	31	169
17%	21%	15%	17%	17%	17%	17%	19%	17%	-%	28% b	17%	36% ab	23%	16%	17%
190	33	2	152	188	190	190	169	190	-	165	190	190	30	35	124
14%	14%	6%	14%	14%	14%	14%	15%	14%	-%	20% b	14%	57% ab	23% c	18% c	12%
164	31	3	129	164	164	164	158	164	-	164	164	91	27	29	108
12%	13%	9%	12%	12%	12%	12%	14%	12%	-%	20% b	12%	27% ab	20% c	15%	11%
137	25	4	109	137	137	137	127	137	-	137	136	88	19	18	99
10%	11%	10%	10%	10%	10%	10%	12%	10%	-%	16% b	10%	27% ab	15%	9%	10%
17	4	*	12	16	17	17	15	17	-	15	17	17	1	4	12
1%	2%	1%	1%	1%	1%	1%	1%	1%	-%	2%	1%	5% ab	1%	2%	1%
7	3	-	4	7	7	7	7	7	-	5	5	1	2	*	5
1%	1%	-%	*%	1%	1%	1%	1%	1%	-%	1%	*%	*%	1%	*%	*%
4	-	-	3	4	4	4	3	4	-	2	4	1	-	-	4
*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	-%	-%	*%
15	2	-	13	15	15	15	9	15	-	5	11	3	*	8	7
1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	*%	4% ac	1%

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Table 34 (continuation)

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QV9b2. Which of the following types of services does each of the types of mail you receive fall into? So for: Large letters
Base: All respondents who receive LARGE LETTERS at their location

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1376	174	92	1093	974	402	1304	72	905	105	352	993	350	8
Weighted total	1346	189	93	1052	954	392	1275	70	866	104	347	968	335	6
Standard delivery	1295	174	90	1021	916	379	1229	66	834	100	339	929	323	4
	96%	92%	97%	97% a	96%	97%	96%	94%	96%	96%	98%	96%	96%	71%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	231	48	12	168	173	58	221	11	148	21	70	159	50	2
	17%	25%	13%	16%	18%	15%	17%	15%	17%	21%	20%	16%	15%	32%
		bc												
International delivery	190	36	17	135	139	51	182	8	124	15	51	136	72	*
	14%	19%	18%	13%	15%	13%	14%	12%	14%	14%	15%	14%	21%	3%
		c												
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	164	27	14	121	127	37	159	5	105	13	46	116	46	*
	12%	14%	15%	12%	13%	9%	13%	7%	12%	13%	13%	12%	14%	3%
					b									
Urgent delivery (send / receive mail that needs to arrive rapidly)	137	19	9	108	103	34	134	2	89	13	43	94	35	*
	10%	10%	10%	10%	11%	9%	11%	3%	10%	13%	12%	10%	10%	3%
							b							
Cross-Border Delivery	17	2	*	14	12	4	16	*	10	1	4	13	4	-
	1%	1%	%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	-%
Other (PLEASE SPECIFY)	7	4	-	3	3	4	7	-	6	-	2	5	4	-
	1%	2%	-%	%	%	1%	1%	-%	1%	-%	1%	%	1%	-%
		c												
None of these (DO NOT READ OUT)	4	*	-	3	2	2	4	-	3	-	-	3	1	-
	%	%	-%	%	%	%	%	-%	%	-%	-%	%	%	-%
Don't Know (DO NOT READ OUT)	15	2	2	11	13	2	15	-	7	2	3	12	-	-
	1%	1%	2%	1%	1%	1%	1%	-%	1%	2%	1%	1%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 34 (continuation)

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QV9b2. Which of the following types of services does each of the types of mail you receive fall into? So for: Large letters

Base: All respondents who receive LARGE LETTERS at their location

Significance Level: 95%

Unweighted total

Weighted total

Standard delivery

Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)

International delivery

Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)

Urgent delivery (send / receive mail that needs to arrive rapidly)

Cross-Border Delivery

Other (PLEASE SPECIFY)

None of these (DO NOT READ OUT)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1376	350	363	351	312
1346	330	343	358	314
1295	318	336	339	302
96%	96%	98%	95%	96%
		c		
231	60	64	60	47
17%	18%	19%	17%	15%
190	47	56	55	33
14%	14%	16%	15%	10%
		d		
164	46	40	47	31
12%	14%	12%	13%	10%
137	41	29	33	34
10%	12%	8%	9%	11%
17	2	3	6	5
1%	1%	1%	2%	2%
7	5	2	-	-
1%	1%	1%	-%	-%
	cd			
4	-	1	*	3
*%	-%	*%	*%	1%
15	2	2	10	1
1%	1%	1%	3%	*%
		abd		

Table 35
QV9b3. Which of the following types of services does each of the types of mail you receive fall into? So for: Parcels and packets
Base: All respondents who receive PARCELS AND PACKETS at their location

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1226	49	84	58	91	74	158	103	86	71	172	148	132	774
Weighted total	1201	68	140	82	86	77	209	145	152	71	68	56	46	1031
Standard delivery	955	51	116	63	69	65	160	107	126	58	53	46	39	816
	79%	76%	83%	76%	81%	85%	77%	74%	83%	81%	78%	82%	85%	79%
													g	
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	632	46	71	47	48	44	122	65	70	40	36	24	20	551
	53%	67%	51%	57%	56%	57%	58%	45%	46%	56%	53%	43%	44%	54%
		ghkl					gkl							kl
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	340	18	32	24	25	27	70	48	37	18	16	14	10	300
	28%	27%	23%	29%	29%	35%	34%	33%	25%	26%	24%	25%	21%	29%
						l	l	l						
Urgent delivery (send / receive mail that needs to arrive rapidly)	235	15	25	19	20	19	39	21	32	10	14	9	11	201
	20%	21%	18%	23%	24%	24%	19%	15%	21%	15%	21%	16%	24%	19%
International delivery	200	10	21	17	13	16	39	26	21	7	12	8	9	170
	17%	14%	15%	20%	15%	21%	19%	18%	14%	10%	18%	15%	20%	16%
Cross-Border Delivery	14	-	-	-	-	-	-	-	-	-	-	-	14	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	29%	-%
													abcdefghijk	
Other (PLEASE SPECIFY)	42	5	*	6	3	*	14	4	2	3	3	*	1	37
	3%	8%	*%	7%	3%	*%	7%	3%	1%	4%	5%	1%	2%	4%
		bek		bek			bek				bk			
None of these (DO NOT READ OUT)	5	2	-	-	-	1	-	2	-	-	-	-	*	5
	*%	3%	-%	-%	-%	2%	-%	1%	-%	-%	-%	-%	1%	*%
		fjk												
Don't Know (DO NOT READ OUT)	10	*	-	2	*	1	2	-	2	*	*	1	1	8
	1%	*%	-%	2%	*%	2%	1%	-%	1%	*%	1%	2%	2%	1%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 35 (continuation)

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QV9b3. Which of the following types of services does each of the types of mail you receive fall into? So for: Parcels and packets

Base: All respondents who receive PARCELS AND PACKETS at their location

Significance Level: 95%

Unweighted total

Weighted total

Standard delivery

Tracked service (send /
receive mail for which
you need to be able to
monitor its progress
through the postal
system)

Timed delivery (send /
receive mail which is
guaranteed to arrive by
a specific time, e.g. by
9am next day or 1pm next
day delivery)

Urgent delivery (send /
receive mail that needs
to arrive rapidly)

International delivery

Cross-Border Delivery

Other (PLEASE SPECIFY)

None of these (DO NOT
READ OUT)

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1226	903	195	48	37	43	323	842	384	1118	108	721	263	105	137
1201	1149	31	8	6	7	52	851	350	1149	52	779	253	84	85
Standard delivery	955	908	28	8	4	6	679	276	912	42	622	205	58	70
79%	79%	92%	97%	75%	90%	91%	80%	79%	79%	81%	80%	81%	68%	82%
		ad	ad			ad					c	c		c
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	632	604	16	5	4	3	453	179	608	24	398	126	58	50
53%	53%	51%	61%	62%	50%	54%	53%	51%	53%	46%	51%	50%	69%	59%
												ab		
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	340	324	9	2	2	15	232	107	325	15	199	82	30	30
28%	28%	31%	29%	29%	27%	30%	27%	31%	28%	28%	26%	32%	35%	35%
												a	a	a
Urgent delivery (send / receive mail that needs to arrive rapidly)	235	220	9	2	2	15	164	71	224	11	139	58	16	22
20%	19%	29%	27%	28%	29%	28%	19%	20%	20%	20%	18%	23%	19%	26%
		a				a								a
International delivery	200	186	8	3	1	14	155	45	196	4	99	53	22	25
17%	16%	25%	39%	25%	18%	26%	18%	13%	17%	7%	13%	21%	26%	29%
		a	abe			a	b		b			a	a	a
Cross-Border Delivery	14	12	1	*	*	2	6	7	13	*	8	3	1	2
1%	1%	4%	3%	4%	5%	4%	1%	2%	1%	1%	1%	1%	1%	2%
		a			a	a		a						
Other (PLEASE SPECIFY)	42	40	1	-	*	2	29	12	42	*	26	9	3	5
3%	4%	3%	-%	7%	2%	3%	3%	4%	4%	4%	3%	3%	3%	5%
None of these (DO NOT READ OUT)	5	5	-	-	-	-	2	4	5	-	5	-	-	-
1%	1%	1%	-%	-%	-%	-%	1%	1%	1%	1%	1%	1%	1%	1%
Don't Know (DO NOT READ OUT)	10	9	*	-	*	1	9	1	10	-	7	3	*	*
1%	1%	1%	-%	2%	3%	1%	1%	1%	1%	1%	1%	1%	1%	1%

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OFC1885

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Table 35 (continuation)

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QV9b3. Which of the following types of services does each of the types of mail you receive fall into? So for: Parcels and packets

Base: All respondents who receive PARCELS AND PACKETS at their location

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	1226	a	b	c	d	e	f	a	b	c	d	e	a	b	a	b
Weighted total	1201	425	242	180	200	101	66	1010	81	50	46	39	256	102	168	191
		478	246	198	178	69	24	1034	66	38	36	27	234	104	147	191
Standard delivery	955	371	203	141	158	58	20	822	51	27	30	24	185	75	118	142
	79%	78%	83%	71%	89%	85%	85%	79%	78%	69%	85%	91%	79%	72%	80%	74%
			c		ac	c						c				
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	632	247	129	106	97	35	14	536	36	23	21	16	141	63	89	115
	53%	52%	53%	53%	54%	50%	61%	52%	55%	59%	60%	60%	60%	61%	61%	60%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	340	124	77	53	51	18	12	287	21	15	8	8	84	34	54	64
	28%	26%	32%	27%	28%	26%	48%	28%	33%	39%	23%	30%	36%	33%	37%	33%
							abcde									
Urgent delivery (send / receive mail that needs to arrive rapidly)	235	82	51	39	39	13	8	192	18	6	11	8	61	23	39	45
	20%	17%	21%	20%	22%	18%	35%	19%	27%	16%	31%	31%	26%	22%	26%	23%
							abcde				a					
International delivery	200	71	45	26	38	10	9	157	12	9	9	13	71	27	48	51
	17%	15%	18%	13%	21%	14%	36%	15%	19%	23%	26%	47%	31%	26%	33%	26%
					c		abcde				a	abcd				
Cross-Border Delivery	14	3	3	1	4	2	*	10	1	1	1	1	3	1	4	1
	1%	1%	1%	%	2%	3%	1%	1%	1%	3%	2%	3%	1%	1%	2%	%
Other (PLEASE SPECIFY)	42	19	3	11	4	*	2	36	1	3	2	-	12	*	5	7
	3%	4%	1%	6%	2%	%	8%	3%	1%	8%	5%	-	5%	%	4%	4%
				be			bde						b			
None of these (DO NOT READ OUT)	5	4	-	2	-	-	-	5	-	-	-	-	-	-	-	-
	*%	1%	-%	1%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	10	3	*	4	2	*	1	10	-	-	*	-	-	-	-	-
	1%	1%	*%	2%	1%	*%	2%	1%	-%	-%	*%	-%	-%	-%	-%	-%
				b			b									

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 35 (continuation)

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QV9b3. Which of the following types of services does each of the types of mail you receive fall into? So for: Parcels and packets

Base: All respondents who receive PARCELS AND PACKETS at their location

Significance Level: 95%

Unweighted total

Weighted total

Standard delivery

Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)

Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)

Urgent delivery (send / receive mail that needs to arrive rapidly)

International delivery

Cross-Border Delivery

Other (PLEASE SPECIFY)

None of these (DO NOT READ OUT)

Don't Know (DO NOT READ OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1226	550	248	421	1160	798	1174	700	390	991	625	1159	257	945	871
1201	559	232	402	1130	734	1147	654	322	973	583	1126	197	914	826
955	441	172	338	905	601	914	510	261	777	439	906	170	751	672
79%	79%	74%	84% ab	80%	82%	80%	78%	81%	80%	75%	80% a	86% ab	82%	81%
632	304	120	206	593	406	606	369	171	518	358	597	127	497	449
53%	54%	52%	51%	53%	55%	53%	56%	53%	53%	61% b	53%	65% b	54%	54%
340	152	68	120	323	211	329	210	92	273	209	323	78	266	254
28%	27%	29%	30%	29%	29%	29%	32%	29%	28%	36% b	29%	40% b	29%	31%
235	95	47	93	224	165	227	153	70	188	146	228	72	193	182
20%	17%	20%	23% a	20%	23%	20%	23% f	22%	19%	25% b	20%	37% ab	21%	22%
200	91	34	75	190	130	191	138	64	163	146	193	107	161	160
17%	16%	15%	19%	17%	18%	17%	21% act	20%	17%	25% b	17%	54% ab	18%	19%
14	5	2	6	13	10	13	9	3	11	8	12	11	10	11
1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	5% ab	1%	1%
42	18	4	17	40	25	40	23	7	31	21	40	7	35	28
3%	3%	2%	4%	4%	3%	3%	4%	2%	3%	4%	4%	3%	4%	3%
5	4	-	2	5	5	5	2	2	4	4	5	-	5	2
*%	1%	-%	*%	*%	1%	*%	*%	1%	*%	1%	*%	-%	1%	*%
10	4	6	-	10	6	10	4	3	10	4	10	1	5	10
1%	1%	3% ac	-%	1%	1%	1%	1%	1%	1%	1%	1%	*%	1%	1%

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Table 35 (continuation)

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QV9b3. Which of the following types of services does each of the types of mail you receive fall into? So for: Parcels and packets

Base: All respondents who receive PARCELS AND PACKETS at their location

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1226	231	30	950	1211	1145	1216	1226	1224	-	870	1215	365	127	189	909
Weighted total	1201	213	31	943	1181	1104	1186	1201	1199	-	854	1190	319	116	176	909
Standard delivery	955	160	18	768	937	883	942	955	952	-	636	955	270	94	133	727
	79%	75%	59%	81%	79%	80%	79%	79%	79%	-%	74%	80%	85%	81%	76%	80%
				ab								a	a			
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	632	123	20	482	619	595	624	632	630	-	632	628	232	64	95	473
	53%	56%	65%	51%	52%	54%	53%	53%	53%	-%	74%	53%	73%	55%	54%	52%
											b		b			
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	340	62	10	265	331	318	335	340	337	-	340	339	144	43	54	243
	28%	29%	32%	28%	28%	29%	28%	28%	28%	-%	40%	28%	45%	37%	31%	27%
											b		b	c		
Urgent delivery (send / receive mail that needs to arrive rapidly)	235	42	8	186	230	224	231	235	233	-	235	235	129	28	45	162
	20%	20%	27%	20%	19%	20%	19%	20%	19%	-%	28%	20%	40%	24%	26%	18%
											b		ab			
International delivery	200	32	2	165	193	189	197	200	200	-	183	200	200	29	31	140
	17%	15%	6%	17%	16%	17%	17%	17%	17%	-%	21%	17%	63%	25%	17%	15%
											b		ab	c		
Cross-Border Delivery	14	3	-	10	13	13	14	14	14	-	13	14	14	1	2	10
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	2%	1%	4%	1%	1%	1%
													ab			
Other (PLEASE SPECIFY)	42	7	*	35	42	36	42	42	42	-	18	40	9	2	6	34
	3%	3%	1%	4%	4%	3%	4%	3%	3%	-%	2%	3%	3%	2%	3%	4%
None of these (DO NOT READ OUT)	5	-	1	4	5	5	5	5	5	-	4	5	-	-	-	5
	1%	-%	4%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
				ac												
Don't Know (DO NOT READ OUT)	10	3	-	7	10	10	10	10	10	-	2	6	2	*	2	8
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 35 (continuation)

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QV9b3. Which of the following types of services does each of the types of mail you receive fall into? So for: Parcels and packets

Base: All respondents who receive PARCELS AND PACKETS at their location

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	*b
Unweighted total	1226	172	91	946	866	360	1165	61	800	92	323	874	335	9
Weighted total	1201	188	95	908	844	357	1138	63	766	97	331	842	317	7
Standard delivery	955	135	80	732	667	288	902	53	609	76	267	672	240	3
	79%	72%	85% a	81% a	79%	81%	79%	83%	79%	79%	81%	80%	76%	40%
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	632	104	68	456	474	158	607	26	399	49	180	435	194	3
	53%	55%	72% ac	50%	56% b	44%	53% b	40%	52%	51%	54%	52%	61%	44%
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	340	55	32	253	252	88	327	12	218	25	95	238	105	*
	28%	29%	34%	28%	30%	25%	29%	19%	28%	25%	29%	28%	33%	3%
Urgent delivery (send / receive mail that needs to arrive rapidly)	235	36	19	180	176	59	226	9	144	17	70	163	76	*
	20%	19%	20%	20%	21%	16%	20%	14%	19%	18%	21%	19%	24%	4%
International delivery	200	47	28	124	143	56	192	8	136	15	67	129	89	1
	17%	25% c	29% c	14%	17%	16%	17%	13%	18%	15%	20% b	15%	28%	12%
Cross-Border Delivery	14	1	*	12	10	4	13	*	7	1	3	10	3	-
	1%	1%	%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	-%
Other (PLEASE SPECIFY)	42	13	4	24	29	13	41	*	30	7	14	28	10	2
	3%	7% c	4%	3%	3%	4%	4%	1%	4%	7%	4%	3%	3%	26%
None of these (DO NOT READ OUT)	5	-	-	5	4	1	4	1	*	2	4	2	-	-
	%	-%	-%	1%	%	%	%	2%	%	2% a	1%	%	-%	-%
Don't Know (DO NOT READ OUT)	10	*	*	9	5	5	10	-	8	*	2	8	-	-
	1%	%	%	1%	1%	1%	1%	-%	1%	%	1%	1%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 35 (continuation)

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QV9b3. Which of the following types of services does each of the types of mail you receive fall into? So for: Parcels and packets

Base: All respondents who receive PARCELS AND PACKETS at their location

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1226	311	319	297	299
Weighted total	1201	295	298	300	307
Standard delivery	955	228	247	252	227
	79%	77%	83%	84%	74%
			d	ad	
Tracked service (send / receive mail for which you need to be able to monitor its progress through the postal system)	632	159	145	170	158
	53%	54%	49%	57%	52%
				b	
Timed delivery (send / receive mail which is guaranteed to arrive by a specific time, e.g. by 9am next day or 1pm next day delivery)	340	85	86	97	72
	28%	29%	29%	32%	24%
				d	
Urgent delivery (send / receive mail that needs to arrive rapidly)	235	59	48	69	59
	20%	20%	16%	23%	19%
				b	
International delivery	200	48	48	62	42
	17%	16%	16%	21%	14%
				d	
Cross-Border Delivery	14	3	3	4	4
	1%	1%	1%	1%	1%
Other (PLEASE SPECIFY)	42	20	12	6	4
	3%	7%	4%	2%	1%
		cd	d		
None of these (DO NOT READ OUT)	5	2	2	1	*
	0%	1%	1%	0%	0%
Don't Know (DO NOT READ OUT)	10	2	2	3	3
	1%	1%	1%	1%	1%

Columns Tested: a,b,c,d

QRM1. At what time do you usually receive your Royal Mail delivery at your premises?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

6am - 8.59am

9am - 11.59am

12pm - 2.59pm

3pm - 5.59pm

6pm - 5.59am

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1566	a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	95	172	110	114	109	274	185	204	87	84	73	62	1350
34	4	7	2	-	-	9	2	2	-	3	4	1	26
2%	4%	4%	2%	-%	-%	3%	1%	1%	-%	3%	5%	2%	2%
	de	de				d				d	degim		
974	59	112	50	73	63	168	121	129	56	59	46	39	830
62%	62%	65%	45%	64%	57%	61%	65%	63%	65%	70%	64%	62%	61%
		c		c		c	c	c	c	cem	c	c	c
454	27	46	43	34	41	78	49	59	20	19	19	17	399
29%	29%	27%	40%	30%	38%	29%	27%	29%	23%	23%	27%	28%	30%
			ijk		ijk								j
22	4	-	2	1	1	4	6	-	1	1	1	2	18
1%	4%	-%	2%	1%	1%	1%	3%	-%	1%	1%	1%	4%	1%
	bh											bhjm	
9	2	-	-	*	-	2	2	-	1	1	*	1	7
1%	2%	-%	-%	*%	-%	1%	1%	-%	1%	1%	1%	1%	1%
76	*	7	13	5	4	13	6	15	8	2	2	2	70
5%	*%	4%	12%	5%	4%	5%	3%	7%	9%	2%	2%	3%	5%
			aefgijkl m					ajk	ajkl				

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Table 36 (continuation) Page 358
QRM1. At what time do you usually receive your Royal Mail delivery at your premises?
Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

6am - 8.59am

9am - 11.59am

12pm - 2.59pm

3pm - 5.59pm

6pm - 5.59am

Don't know

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
34	32	*	1	1	*	2	21	13	29	5	22	6	1	6
2%	2%	1%	6%	9%	6%	3%	2%	3%	2%	8%	2%	2%	1%	6%
			b	ab	b					a				abc
974	931	27	7	5	5	43	700	274	940	34	675	180	60	60
62%	62%	70%	69%	69%	64%	69%	63%	60%	62%	59%	62%	64%	59%	63%
		a				a								
454	440	9	2	1	2	14	306	148	439	15	322	76	32	23
29%	29%	23%	22%	20%	22%	23%	27%	33%	29%	26%	30%	27%	32%	25%
	f							a						
22	22	*	-	-	-	*	15	7	22	-	14	4	4	*
1%	1%	1%	-%	-%	-%	*%	1%	2%	1%	-%	1%	1%	4%	1%
9	9	1	-	-	-	1	9	1	9	-	8	*	*	1
1%	1%	1%	-%	-%	-%	1%	1%	*%	1%	-%	1%	*%	*%	1%
76	73	1	*	*	1	2	64	12	72	4	51	14	5	5
5%	5%	3%	3%	2%	9%	4%	6%	3%	5%	6%	5%	5%	5%	6%
							b							

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Table 36 (continuation) Page 359

QRM1. At what time do you usually receive your Royal Mail delivery at your premises?

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
6am - 8.59am	34	17	3	8	3	2	1	1	28	1	2	*	2	13	3	8	8
	2%	2%	1%	3%	2%	2%	3%	6%	2%	1%	6%	1%	a	5%	2%	5%	4%
9am - 11.59am	974	421	198	144	134	52	19	6	859	43	27	29	16	195	71	118	148
	62%	60%	65%	61%	63%	67%	67%	61%	62%	58%	70%	71%	56%	71%	61%	66%	70%
12pm - 2.59pm	454	209	88	68	64	18	5	3	406	25	6	9	8	52	37	44	45
	29%	30%	29%	29%	30%	23%	17%	32%	29%	34%	15%	22%	28%	19%	31%	24%	21%
		f	f	f	f				c	c				a	a		
3pm - 5.59pm	22	10	6	3	2	-	-	-	20	*	2	*	-	2	2	2	3
	1%	1%	2%	1%	1%	-%	-%	-%	1%	1%	5%	1%	-%	1%	2%	1%	1%
6pm - 5.59am	9	5	*	*	2	*	1	-	9	-	-	*	-	1	2	1	2
	1%	1%	%	%	1%	%	4%	-%	1%	-%	-%	%	-%	%	2%	1%	1%
						abce	bd										
Don't know	76	39	9	11	8	6	3	*	66	4	2	2	2	10	2	7	5
	5%	6%	3%	5%	4%	8%	9%	1%	5%	6%	4%	5%	8%	4%	2%	4%	3%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 36 (continuation) Page 360
QRM1. At what time do you usually receive your Royal Mail delivery at your premises?
Base: All respondents who use Royal Mail

Significance Level: 95%
Unweighted total
Weighted total
6am - 8.59am
9am - 11.59am
12pm - 2.59pm
3pm - 5.59pm
6pm - 5.59am
Don't know
Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
1566	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
6am - 8.59am	34	18	5	28	23	30	16	14	22	15	30	7	25	21
2%	2%	2%	2%	2%	3%	2%	2%	4%	2%	2%	2%	3%	2%	2%
								act						
9am - 11.59am	974	494	176	904	551	909	461	237	778	395	900	146	724	660
62%	62%	64%	61%	62%	62%	61%	65%	63%	62%	60%	62%	63%	61%	61%
12pm - 2.59pm	454	234	75	420	259	433	179	100	367	187	424	57	358	326
29%	29%	27%	28%	29%	29%	29%	25%	27%	29%	29%	29%	25%	30%	30%
3pm - 5.59pm	22	7	6	22	11	22	12	4	13	11	21	5	19	14
1%	1%	2%	2%	2%	1%	2%	2%	1%	1%	2%	1%	2%	2%	1%
6pm - 5.59am	9	3	3	9	6	9	3	3	7	5	8	*	8	5
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Don't know	76	36	10	72	39	75	33	17	58	40	72	15	60	49
5%	5%	4%	6%	5%	4%	5%	5%	5%	5%	6%	5%	7%	5%	5%

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Table 36 (continuation)

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QRM1. At what time do you usually receive your Royal Mail delivery at your premises?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

6am - 8.59am

9am - 11.59am

12pm - 2.59pm

3pm - 5.59pm

6pm - 5.59am

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1566	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
276	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
34	7	-	27	32	29	32	21	34	-	14	32	6	8	5	21
2%	3%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	2%	5%	2%	2%
974	148	24	811	949	821	953	739	965	2	548	950	226	95	137	742
62%	57%	67%	63% a	62%	62%	62%	63%	62%	100%	63%	62%	65%	66%	58%	62%
454	85	8	365	438	371	441	330	452	-	254	445	94	30	79	345
29%	33%	24%	28%	29%	28%	29%	28%	29%	-%	29%	29%	27%	21%	34% a	29% a
22	3	-	19	22	19	22	17	22	-	12	22	5	3	*	19
1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	2%	1%	2%
9	4	-	5	9	9	9	7	9	-	5	9	1	-	3	6
1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	1%	1%
c															
76	14	3	60	76	65	76	59	76	-	41	75	18	9	11	54
5%	5%	10%	5%	5%	5%	5%	5%	5%	-%	5%	5%	5%	6%	5%	5%

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Table 36 (continuation)

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QRM1. At what time do you usually receive your Royal Mail delivery at your premises?

Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	1468	102	1038	123	395	1175	348	7
6am - 8.59am	34	5	1	24	23	31	3	29	2	4	30	16	-
	2%	3%	1%	2%	2%	2%	3%	3%	2%	1%	3%	4%	-%
9am - 11.59am	974	127	55	788	662	914	60	715	39	214	760	237	4
	62%	68%	53%	62%	62%	62%	59%	69%	32%	54%	65%	68%	66%
		b						b			a		
12pm - 2.59pm	454	47	33	374	314	429	26	251	60	139	315	78	2
	29%	25%	32%	29%	29%	29%	25%	24%	49%	35%	27%	23%	34%
								a		b			
3pm - 5.59pm	22	2	4	16	15	22	-	6	6	4	18	5	-
	1%	1%	3%	1%	1%	2%	-%	1%	5%	1%	2%	1%	-%
								a					
6pm - 5.59am	9	*	-	9	5	7	2	3	3	5	4	3	-
	1%	*%	-%	1%	1%	*%	2%	*%	3%	1%	*%	1%	-%
						a		a		b			
Don't know	76	6	11	57	48	65	11	32	11	28	48	10	-
	5%	3%	10%	5%	4%	4%	11%	3%	9%	7%	4%	3%	-%
			ac				a		a	b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

QRM1. At what time do you usually receive your Royal Mail delivery at your premises?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

6am - 8.59am

9am - 11.59am

12pm - 2.59pm

3pm - 5.59pm

6pm - 5.59am

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1566	398	404	389	375
1570	387	400	396	387
34	8	9	8	9
2%	2%	2%	2%	2%
974	229	264	240	241
62%	59%	66%	61%	62%
		a		
454	116	100	126	112
29%	30%	25%	32%	29%
		b		
22	9	5	6	3
1%	2%	1%	1%	1%
9	2	7	-	-
1%	1%	2%	-%	-%
		cd		
76	23	15	15	22
5%	6%	4%	4%	6%

Table 37

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?
Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	22 1%	4 4%	5 3%	* %	2 2%	1 1%	4 1%	2 1%	- -%	3 3%	1 1%	1 1%	1 1%	20 1%
Fairly Dissatisfied	101 6%	7 8%	9 6%	16 15%	12 11%	6 5%	13 5%	11 6%	11 5%	4 5%	5 6%	3 4%	3 5%	90 7%
				befghij klm	fk									
Neither Satisfied Nor Dissatisfied	409 26%	22 23%	40 23%	28 25%	27 24%	42 38%	74 27%	57 31%	57 28%	17 20%	18 21%	16 21%	13 20%	364 27%
					abdfijklm			jl						
Fairly Satisfied	632 40%	40 42%	69 40%	47 43%	43 38%	36 33%	118 43%	70 38%	75 37%	44 51%	37 43%	28 38%	25 39%	543 40%
										ehkm				
Very Satisfied	405 26%	22 23%	49 29%	18 17%	30 26%	25 23%	65 24%	46 25%	61 30%	18 20%	25 29%	26 35%	22 35%	333 25%
									c		c	cefgim	cefim	
Don't Know (DO NOT READ OUT)	* 1%	- -%	- -%	- -%	- -%	- -%	* 1%	- -%	- -%	- -%	- -%	- -%	- -%	* 1%
NET: Satisfied	1038 66%	62 65%	118 69%	66 60%	73 64%	61 56%	183 67%	115 62%	136 67%	62 72%	61 73%	53 74%	46 74%	877 65%
							e			e	cegm	cegm	cegm	
NET: Dissatisfied	123 8%	11 11%	14 8%	16 15%	14 12%	7 6%	17 6%	13 7%	11 5%	7 8%	6 7%	4 5%	4 6%	110 8%
				fhijklm	k									
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 37 (continuation) Page 365

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?

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	22	20	1	-	1	*	2	12	10	22	*	9	9	3	1
	1%	1%	3%	-	10%	2%	3%	1%	2%	1%	1%	1%	3%	3%	1%
					abcf		a						a		
Fairly Dissatisfied	101	97	2	1	1	*	4	81	19	98	3	70	15	9	7
	6%	6%	6%	8%	13%	2%	6%	7%	4%	6%	4%	6%	5%	9%	8%
					e			b							
Neither Satisfied Nor Dissatisfied	409	395	9	3	2	1	15	298	111	394	15	276	75	31	28
	26%	26%	23%	28%	25%	19%	23%	27%	24%	26%	26%	25%	27%	30%	29%
Fairly Satisfied	632	606	17	4	2	3	26	454	179	611	21	448	102	44	38
	40%	40%	44%	44%	30%	37%	41%	41%	39%	40%	37%	41%	36%	43%	40%
Very Satisfied	405	389	9	2	2	3	16	270	135	386	19	289	80	16	21
	26%	26%	25%	19%	22%	40%	25%	24%	30%	26%	33%	26%	28%	15%	22%
					abcf			a				c	c		
Don't Know (DO NOT READ OUT)	*	-	*	-	-	-	*	*	-	-	*	-	*	-	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
			a												
NET: Satisfied	1038	996	26	6	4	6	42	723	314	997	40	737	182	60	59
	66%	66%	68%	64%	52%	78%	67%	65%	69%	66%	69%	67%	65%	59%	62%
			d			d						c			
NET: Dissatisfied	123	117	3	1	2	*	6	94	29	120	3	79	24	11	8
	8%	8%	9%	8%	22%	4%	9%	8%	6%	8%	5%	7%	9%	11%	9%
					abcef										

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 37 (continuation)

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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?

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	22 1%	8 1%	6 2%	* %	5 2%	2 3%	* 1%	* 5%	20 1%	* %	2 5%	* 1%	* %	1 %	4 3%	- %	4 2%
			c		c	c								a		a	
Fairly Dissatisfied	101 6%	43 6%	19 6%	21 9%	12 6%	4 5%	3 9%	- -%	88 6%	8 11%	1 2%	4 9%	* %	19 7%	8 7%	15 8%	12 6%
									ce								
Neither Satisfied Nor Dissatisfied	409 26%	178 25%	91 30%	48 20%	66 31%	19 25%	7 26%	- -%	354 26%	16 21%	15 39%	12 28%	13 44%	74 27%	34 29%	39 22%	69 33%
			c		c						ab		ab			a	
Fairly Satisfied	632 40%	267 38%	117 38%	117 50%	82 39%	33 43%	12 43%	4 38%	557 40%	27 37%	18 47%	21 52%	9 31%	115 42%	47 40%	80 45%	81 38%
				abd													
Very Satisfied	405 26%	206 29%	72 24%	48 20%	49 23%	19 25%	6 21%	6 57%	368 27%	23 30%	3 8%	4 10%	7 24%	66 24%	25 21%	46 26%	44 21%
		c							cd	cd			c				
Don't Know (DO NOT READ OUT)	* %	- -%	- -%	- -%	* %	- -%	- -%	- -%	* %	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
NET: Satisfied	1038 66%	472 67%	189 62%	165 71%	131 61%	53 68%	18 64%	9 95%	925 67%	50 67%	21 55%	25 62%	16 55%	180 66%	71 61%	126 70%	126 59%
				bd												b	
NET: Dissatisfied	123 8%	51 7%	25 8%	21 9%	17 8%	6 8%	3 10%	* 5%	107 8%	8 11%	2 6%	4 10%	* 1%	20 7%	12 10%	15 8%	16 8%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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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?

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	22	11	7	22	14	22	8	6	18	8	21	3	17	17
1%	1%	3%	1%	2%	2%	2%	1%	2%	1%	1%	1%	1%	1%	2%
		c												
Fairly Dissatisfied	101	41	22	93	59	93	43	21	79	48	93	13	77	70
6%	5%	8%	7%	6%	7%	6%	6%	6%	6%	7%	6%	6%	6%	6%
Neither Satisfied Nor Dissatisfied	409	199	79	381	236	386	204	101	325	193	385	59	316	286
26%	25%	29%	26%	26%	27%	26%	29%	27%	26%	30%	26%	26%	26%	27%
Fairly Satisfied	632	320	111	580	380	594	287	154	510	262	586	97	501	455
40%	40%	41%	40%	40%	43%	40%	41%	41%	41%	40%	40%	42%	42%	42%
Very Satisfied	405	220	54	380	200	383	163	93	313	142	370	58	283	248
26%	28%	20%	26%	26%	22%	26%	23%	25%	25%	22%	25%	25%	24%	23%
	b		b	b										
Don't Know (DO NOT READ OUT)	*	*	-	*	*	*	-	-	*	-	*	-	*	-
*%	*%	-%	-%	*%	*%	*%	-%	-%	*%	-%	*%	-%	*%	-%
NET: Satisfied	1038	540	166	959	580	977	450	247	823	404	956	155	783	703
66%	68%	61%	66%	66%	65%	66%	64%	66%	66%	62%	66%	67%	66%	65%
	b													
NET: Dissatisfied	123	53	29	115	73	115	51	27	97	57	113	16	94	87
8%	7%	11%	8%	8%	8%	8%	7%	7%	8%	9%	8%	7%	8%	8%
		a												

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 37 (continuation)

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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?

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	22 1%	6 2%	- -%	16 1%	22 1%	17 1%	22 1%	20 2%	22 1%	- -%	12 1%	22 1%	1 *%	* -%	6 3%	16 1%
Fairly Dissatisfied	101 6%	20 8%	- -%	81 6%	94 6%	87 7%	98 6%	77 7%	101 6%	- -%	57 6%	98 6%	21 6%	9 7%	30 13%	59 5%
Neither Satisfied Nor Dissatisfied	409 26%	83 32%	15 41%	317 25%	399 26%	346 26%	400 26%	310 26%	400 26%	- -%	233 27%	403 26%	85 24%	37 26%	67 29%	304 26%
Fairly Satisfied	632 40%	95 36%	11 29%	533 41%	615 40%	534 41%	617 40%	466 40%	632 41%	- -%	360 41%	618 40%	150 43%	46 32%	84 36%	503 42%
Very Satisfied	405 26%	57 22%	11 30%	341 26%	394 26%	332 25%	394 26%	300 26%	403 26%	2 100%	213 24%	391 26%	94 27%	52 36%	48 20%	305 26%
Don't Know (DO NOT READ OUT)	* *%	- -%	- -%	* *%	* *%	* *%	* *%	- -%	* *%	- -%	- -%	* *%	- -%	- -%	- -%	* *%
NET: Satisfied	1038 66%	152 58%	21 59%	873 68%	1010 66%	866 66%	1011 66%	766 65%	1035 66%	2 100%	573 65%	1010 66%	244 70%	98 67%	131 56%	808 68%
NET: Dissatisfied	123 8%	26 10%	- -%	96 7%	117 8%	104 8%	121 8%	97 8%	123 8%	- -%	69 8%	120 8%	22 6%	10 7%	36 15%	75 6%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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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?

Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	22 1%	3 2%	2 2%	17 1%	21 2%	1 *%	20 1%	2 2%	- 0%	22 18%	17 4%	5 *%	4 1%	- 0%
Fairly Dissatisfied	101 6%	13 7%	8 8%	77 6%	65 6%	36 7%	93 6%	7 7%	- 0%	101 82%	62 16%	39 3%	21 6%	2 27%
Neither Satisfied Nor Dissatisfied	409 26%	60 32%	33 32%	314 25%	300 28%	109 22%	384 26%	25 24%	- 0%	- 0%	149 38%	260 22%	98 28%	1 9%
Fairly Satisfied	632 40%	69 37%	39 38%	521 41%	436 41%	197 39%	604 41%	28 27%	632 61%	- 0%	126 32%	507 43%	147 42%	4 61%
Very Satisfied	405 26%	42 22%	21 20%	340 27%	245 23%	160 32%	365 25%	40 39%	405 39%	- 0%	41 10%	364 31%	78 22%	* 3%
Don't Know (DO NOT READ OUT)	* *%	- 0%	- 0%	* *%	- 0%	* *%	* *%	- 0%	- 0%	- 0%	- 0%	* *%	- 0%	- 0%
NET: Satisfied	1038 66%	110 59%	60 58%	861 68% ab	681 64%	357 71% a	970 66%	68 66%	1038 100% b	- 0%	166 42%	871 74% a	225 65%	4 64%
NET: Dissatisfied	123 8%	17 9%	10 10%	94 7%	86 8%	36 7%	113 8%	9 9%	- 0%	123 100% a	79 20% b	43 4%	25 7%	2 27%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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?

Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	22	9	7	2	5
	1%	2%	2%	*%	1%
		c			
Fairly Dissatisfied	101	23	28	21	28
	6%	6%	7%	5%	7%
Neither Satisfied Nor					
Dissatisfied	409	114	105	117	74
	26%	29%	26%	30%	19%
		d	d	d	
Fairly Satisfied	632	160	169	151	152
	40%	41%	42%	38%	39%
Very Satisfied	405	82	90	106	128
	26%	21%	23%	27%	33%
					ab
Don't Know (DO NOT READ OUT)	*	-	-	-	*
	*%	-%	-%	-%	*%
NET: Satisfied	1038	242	260	256	279
	66%	62%	65%	65%	72%
					abc
NET: Dissatisfied	123	32	35	23	33
	8%	8%	9%	6%	9%

Columns Tested: a,b,c,d

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Delivery time (when you receive your mail delivery) (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?)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	126	6	9	11	10	11	17	25	15	7	4	6	5	111
	8%	6%	5%	10%	9%	10%	6%	14%	7%	9%	5%	9%	8%	8%
							bfgm							
Fairly Dissatisfied	230	18	24	20	14	16	54	26	23	9	11	8	5	205
	15%	19%	14%	19%	13%	14%	20%	14%	11%	10%	13%	12%	8%	15%
		l		l			hkl							l
Neither Satisfied Nor Dissatisfied	377	17	36	36	31	24	73	35	63	22	13	14	12	337
	24%	18%	21%	33%	27%	22%	27%	19%	31%	25%	16%	20%	19%	25%
				agjkl	j		j		gijkl					j
Fairly Satisfied	455	36	56	25	33	32	67	55	53	34	28	17	19	391
	29%	38%	33%	23%	29%	29%	24%	30%	26%	39%	33%	24%	31%	29%
		fk								cfk	k			
Very Satisfied	369	18	46	13	25	27	61	42	48	15	27	26	21	296
	24%	19%	27%	12%	22%	25%	22%	23%	23%	18%	31%	36%	33%	22%
		c			c	c			c		cfim	acdefghim	acdfgim	c
Don't Know (DO NOT READ OUT)	11	-	*	4	-	-	2	2	2	-	1	*	*	10
	1%	-%	%	3%	-%	-%	1%	1%	1%	-%	1%	%	%	1%
				klm										
NET: Satisfied	825	55	102	38	59	59	127	97	101	49	54	43	40	687
	53%	57%	59%	35%	52%	54%	47%	52%	49%	56%	64%	60%	64%	51%
		c	cf		c	c		c	c	c	cdfighm	cfm	cdfighm	c
NET: Dissatisfied	357	24	33	31	24	26	71	52	38	17	16	15	10	316
	23%	25%	19%	29%	21%	24%	26%	28%	18%	19%	18%	20%	16%	23%
				l			l	jl						l
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Delivery time (when you receive your mail delivery) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	126	121	4	*	1	*	6	92	35	122	5	76	26	18	6
	8%	8%	12%	5%	9%	5%	9%	8%	8%	8%	8%	7%	9%	17%	7%
													abd		
Fairly Dissatisfied	230	222	5	1	2	1	9	168	63	220	11	146	56	15	14
	15%	15%	12%	15%	26%	8%	14%	15%	14%	15%	18%	13%	20%	15%	14%
					abef								a		
Neither Satisfied Nor Dissatisfied	377	364	8	3	1	2	13	272	105	366	12	281	53	24	19
	24%	24%	20%	34%	13%	21%	21%	24%	23%	24%	20%	26%	19%	23%	20%
				bdf								b			
Fairly Satisfied	455	435	14	3	2	2	20	329	126	443	13	309	82	33	31
	29%	29%	36%	32%	24%	24%	33%	29%	28%	29%	22%	28%	29%	32%	33%
			a												
Very Satisfied	369	356	7	1	2	3	13	244	125	351	18	271	63	12	23
	24%	24%	19%	14%	27%	38%	22%	22%	27%	23%	31%	25%	22%	12%	24%
						abcf		a			a	c	c		c
Don't Know (DO NOT READ OUT)	11	10	*	-	-	*	1	10	1	11	*	8	1	*	2
	1%	1%	1%	-	-	4%	1%	1%	1%	1%	1%	1%	1%	1%	2%
						a									b
NET: Satisfied	825	791	21	4	4	5	34	573	251	794	31	580	145	46	54
	53%	52%	55%	46%	51%	62%	54%	51%	55%	53%	53%	53%	52%	45%	57%
															c
NET: Dissatisfied	357	342	9	2	3	1	15	259	97	341	15	222	82	33	20
	23%	23%	24%	20%	36%	13%	23%	23%	21%	23%	26%	20%	29%	32%	21%
					e							a		ad	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Delivery time (when you receive your mail delivery) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	126 8%	35 5%	29 9%	25 11%	25 12%	8 10%	5 17%	* 3%	109 8%	11 15%	3 8%	4 10%	* %	16 6%	8 7%	13 7%	11 5%
Fairly Dissatisfied	230 15%	94 13%	44 14%	37 16%	36 17%	12 16%	7 26%	* 1%	205 15%	11 15%	8 21%	3 8%	3 11%	34 13%	19 16%	21 12%	32 15%
Neither Satisfied Nor Dissatisfied	377 24%	176 25%	77 25%	48 21%	53 25%	17 22%	4 14%	2 20%	339 24%	10 13%	8 21%	15 36%	6 19%	66 24%	34 29%	37 20%	63 30%
Fairly Satisfied	455 29%	198 28%	80 26%	83 36%	61 29%	20 26%	7 23%	5 55%	396 29%	20 27%	12 31%	15 36%	12 41%	88 32%	33 28%	60 34%	61 29%
Very Satisfied	369 24%	192 27%	75 24%	39 16%	36 17%	20 26%	5 19%	2 22%	327 24%	22 30%	8 20%	4 10%	8 28%	68 25%	22 18%	48 27%	43 20%
Don't Know (DO NOT READ OUT)	11 1%	6 1%	* %	2 1%	2 1%	* %	* 1%	- -%	11 1%	- -%	* %	- -%	- -%	* %	2 2%	- %	2 1%
NET: Satisfied	825 53%	390 56%	155 51%	122 52%	97 46%	41 52%	12 42%	7 76%	723 52%	42 57%	20 51%	19 46%	20 69%	157 57%	55 47%	108 60%	104 49%
NET: Dissatisfied	357 23%	129 18%	72 24%	62 27%	61 28%	20 26%	12 43%	* 4%	313 23%	22 30%	11 28%	7 18%	3 12%	51 19%	27 23%	35 19%	43 20%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Delivery time (when you receive your mail delivery) (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?)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	126	54	29	121	87	121	57	29	113	67	121	23	107	79
	8%	7%	11%	8%	10%	8%	8%	8%	9%	10%	8%	10%	9%	7%
	a													
Fairly Dissatisfied	230	98	52	216	152	221	97	59	188	107	219	35	188	176
	15%	12%	19%	15%	17%	15%	14%	16%	15%	16%	15%	15%	16%	16%
		a												
Neither Satisfied Nor Dissatisfied	377	206	52	341	218	353	171	86	295	151	351	54	294	279
	24%	26%	19%	23%	24%	24%	24%	23%	24%	23%	24%	23%	25%	26%
		b												
Fairly Satisfied	455	225	78	426	247	429	229	112	363	190	424	67	333	322
	29%	28%	29%	29%	28%	29%	33%	30%	29%	29%	29%	29%	28%	30%
					b									
Very Satisfied	369	203	61	341	182	344	147	87	280	136	333	49	264	215
	24%	26%	22%	23%	20%	23%	21%	23%	22%	21%	23%	21%	22%	20%
Don't Know (DO NOT READ OUT)	11	7	2	9	5	9	3	2	7	2	7	2	7	5
	1%	1%	1%	1%	1%	1%	*	1%	1%	*	*	1%	1%	*
NET: Satisfied	825	428	139	767	428	773	376	200	643	325	757	117	596	536
	53%	54%	51%	53%	48%	52%	53%	53%	52%	50%	52%	51%	50%	50%
				b		b	b							
NET: Dissatisfied	357	152	82	338	239	343	155	88	301	174	339	58	296	255
	23%	19%	30%	23%	27%	23%	22%	23%	24%	27%	23%	25%	25%	24%
			a		acd									

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 38 (continuation)

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Delivery time (when you receive your mail delivery) (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	126 8%	26 10%	* 1%	101 8%	123 8%	111 8%	124 8%	100 8%	125 8%	- -%	68 8%	124 8%	35 10%	10 7%	35 15%	81 7%
Fairly Dissatisfied	230 15%	47 18%	11 29%	176 14%	225 15%	215 16%	227 15%	178 15%	230 15%	- -%	148 17%	226 15%	58 17%	11 8%	49 21%	171 14%
Neither Satisfied Nor Dissatisfied	377 24%	51 20%	9 26%	322 25%	366 24%	304 23%	370 24%	269 23%	371 24%	- -%	196 22%	370 24%	77 22%	28 19%	57 24%	292 25%
Fairly Satisfied	455 29%	75 29%	6 16%	376 29%	445 29%	380 29%	445 29%	354 30%	452 29%	2 100%	257 29%	450 29%	103 29%	44 30%	58 25%	353 30%
Very Satisfied	369 24%	55 21%	10 28%	308 24%	356 23%	298 23%	356 23%	266 23%	369 24%	- -%	199 23%	352 23%	75 21%	52 36%	33 14%	282 24%
Don't Know (DO NOT READ OUT)	11 1%	6 2%	- -%	5 *%	11 1%	7 1%	11 1%	7 1%	11 1%	- -%	6 1%	11 1%	3 1%	* *%	2 1%	9 1%
NET: Satisfied	825 53%	130 50%	16 44%	684 53%	800 52%	678 52%	801 52%	620 53%	821 53%	2 100%	456 52%	802 52%	178 51%	95 66%	91 39%	635 53%
NET: Dissatisfied	357 23%	73 28%	11 30%	276 21%	348 23%	326 25%	351 23%	277 24%	355 23%	- -%	217 25%	350 23%	93 27%	21 15%	84 36%	252 21%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 38 (continuation)

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Delivery time (when you receive your mail delivery) (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?)
Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	126	21	5	99	110	124	2	26	56	64	63	19	2
	8%	11%	5%	8%	10%	8%	2%	3%	46%	16%	5%	5%	27%
					b				a				
Fairly Dissatisfied	230	22	26	182	172	223	8	72	33	77	154	47	-
	15%	12%	25%	14%	16%	15%	7%	7%	27%	19%	13%	14%	-%
			ac		b				a				
Neither Satisfied Nor Dissatisfied	377	41	13	321	248	354	23	208	18	100	277	86	2
	24%	22%	13%	25%	23%	24%	23%	20%	15%	25%	24%	25%	34%
			b										
Fairly Satisfied	455	57	34	363	294	422	34	376	12	100	356	116	*
	29%	31%	33%	29%	28%	29%	33%	36%	10%	25%	30%	33%	5%
								b					
Very Satisfied	369	44	25	295	237	336	33	349	3	54	315	79	2
	24%	24%	25%	23%	22%	23%	32%	34%	2%	14%	27%	23%	34%
							a				a		
Don't Know (DO NOT READ OUT)	11	2	*	9	5	9	2	7	*	1	10	2	-
	1%	1%	%	1%	1%	1%	2%	1%	%	%	1%	1%	-%
NET: Satisfied	825	101	59	658	531	758	67	725	15	153	671	195	3
	53%	54%	57%	52%	50%	52%	66%	70%	12%	39%	57%	56%	39%
					a		a	b			a		
NET: Dissatisfied	357	43	31	281	282	347	10	98	89	140	216	66	2
	23%	23%	30%	22%	26%	24%	10%	9%	73%	36%	18%	19%	27%
					b		b		a		b		

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Delivery time (when you receive your mail delivery) (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?)
Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	126 8%	40 10%	41 10%	24 6%	21 5%
		cd	cd		
Fairly Dissatisfied	230 15%	63 16%	66 17%	57 15%	43 11%
		d	d		
Neither Satisfied Nor Dissatisfied	377 24%	108 28%	69 17%	121 31%	79 21%
		bd		bd	
Fairly Satisfied	455 29%	89 23%	132 33%	107 27%	128 33%
		a	a		
Very Satisfied	369 24%	85 22%	89 22%	82 21%	113 29%
					abc
Don't Know (DO NOT READ OUT)	11 1%	2 1%	2 1%	4 1%	2 1%
NET: Satisfied	825 53%	174 45%	221 55%	188 48%	241 62%
			ac		abc
NET: Dissatisfied	357 23%	104 27%	107 27%	82 21%	64 17%
		cd	cd		

Columns Tested: a,b,c,d

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Delivery consistency / reliability (e.g. arrives as promised consistently) (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?)
Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	61 4%	5 6%	3 2%	6 5%	8 7%	3 3%	7 3%	9 5%	8 4%	5 6%	3 4%	2 2%	1 1%	56 4%
		l			bkl			l		l				
Fairly Dissatisfied	138 9%	13 13%	9 6%	18 17%	5 5%	11 10%	30 11%	25 14%	7 3%	4 5%	5 6%	6 8%	5 8%	123 9%
		dhl		bdhijkm		h	hj	bdhij						h
Neither Satisfied Nor Dissatisfied	340 22%	19 20%	46 27%	24 22%	27 23%	29 26%	62 23%	35 19%	42 20%	17 19%	17 20%	14 20%	10 16%	299 22%
			l			l								
Fairly Satisfied	582 37%	29 31%	63 37%	42 38%	38 34%	46 42%	97 35%	71 39%	78 38%	37 43%	31 37%	26 36%	22 35%	502 37%
Very Satisfied	427 27%	28 29%	49 29%	17 15%	33 29%	21 19%	72 26%	44 24%	65 32%	23 27%	28 33%	24 32%	24 38%	352 26%
		c	c		c				ce		cem	ce	cefgm	c
Don't Know (DO NOT READ OUT)	20 1%	2 2%	* *	4 3%	3 2%	- -	5 2%	- -	4 2%	- -	1 1%	1 1%	1 1%	18 1%
				g										
NET: Satisfied	1010 64%	57 60%	113 66%	59 53%	71 62%	67 61%	169 62%	116 62%	143 70%	61 70%	59 70%	50 69%	46 74%	855 63%
									c	c	c	c	acdefgm	
NET: Dissatisfied	200 13%	18 19%	12 7%	24 22%	14 12%	14 13%	37 14%	35 19%	15 8%	9 11%	8 9%	7 10%	6 9%	178 13%
		bhlj		bhijklm				bhijkl						
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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Delivery consistency / reliability (e.g. arrives as promised consistently) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	61 4%	58 4%	2 6%	* 3%	* 4%	* 5%	3 5%	45 4%	16 4%	57 4%	4 7%	32 3%	12 4%	11 10%	6 7%
														ab	a
Fairly Dissatisfied	138 9%	132 9%	3 8%	1 9%	2 24%	* 4%	6 10%	109 10%	30 7%	136 9%	2 4%	97 9%	21 7%	11 11%	9 9%
					abef			b		b					
Neither Satisfied Nor Dissatisfied	340 22%	329 22%	6 16%	2 23%	2 23%	1 19%	12 18%	241 22%	100 22%	333 22%	7 13%	244 22%	62 22%	19 19%	15 16%
										b					
Fairly Satisfied	582 37%	557 37%	17 45%	4 42%	2 25%	2 27%	25 40%	415 37%	167 37%	558 37%	24 41%	394 36%	103 37%	38 37%	47 49%
			ade												ab
Very Satisfied	427 27%	412 27%	9 23%	2 23%	2 24%	3 41%	16 25%	293 26%	134 30%	407 27%	21 36%	312 29%	80 28%	22 21%	14 15%
						abcf					a	d	d		
Don't Know (DO NOT READ OUT)	20 1%	20 1%	1 2%	- -	- -	* 4%	1 2%	13 1%	8 2%	20 1%	* 1%	12 1%	3 1%	1 1%	4 4%
															ab
NET: Satisfied	1010 64%	969 64%	26 68%	6 64%	3 49%	5 68%	41 65%	708 64%	301 66%	965 64%	45 76%	706 65%	182 65%	60 59%	61 64%
		d	d				d				a				
NET: Dissatisfied	200 13%	190 13%	5 14%	1 13%	2 28%	1 9%	9 15%	153 14%	46 10%	193 13%	6 10%	129 12%	33 12%	22 22%	15 16%
					abef			b						ab	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Delivery consistency / reliability (e.g. arrives as promised consistently) (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?)
Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	61 4%	15 2%	10 3%	12 5%	15 7%	6 7%	3 11%	* 1%	50 4%	6 8%	3 8%	2 5%	* 1%	7 3%	4 3%	6 4%	5 2%
Fairly Dissatisfied	138 9%	65 9%	26 8%	18 8%	17 8%	9 12%	4 13%	* 4%	120 9%	4 6%	3 8%	6 14%	5 18%	30 11%	12 10%	16 9%	26 12%
Neither Satisfied Nor Dissatisfied	340 22%	143 20%	73 24%	55 24%	49 23%	17 22%	3 11%	* 4%	306 22%	12 16%	10 25%	9 22%	5 15%	62 23%	29 25%	40 22%	51 24%
Fairly Satisfied	582 37%	263 38%	114 38%	84 36%	78 37%	24 31%	11 37%	7 71%	508 37%	27 36%	16 42%	16 39%	15 52%	101 37%	42 36%	70 39%	74 35%
Very Satisfied	427 27%	205 29%	80 26%	64 27%	52 24%	19 25%	5 19%	2 20%	383 28%	25 34%	7 18%	8 20%	4 14%	71 26%	28 24%	47 26%	52 24%
Don't Know (DO NOT READ OUT)	20 1%	10 1%	2 1%	* %	3 1%	3 3%	2 8%	- -%	20 1%	- -%	* %	- -%	- -%	2 1%	2 2%	* %	4 2%
NET: Satisfied	1010 64%	468 67%	194 64%	149 63%	130 61%	44 56%	16 57%	9 90%	891 64%	52 70%	23 59%	24 59%	19 66%	172 63%	71 60%	117 65%	125 59%
NET: Dissatisfied	200 13%	80 11%	36 12%	30 13%	32 15%	15 19%	7 25%	1 6%	170 12%	11 14%	6 16%	8 19%	6 19%	37 14%	15 13%	22 12%	31 14%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Delivery consistency / reliability (e.g. arrives as promised consistently) (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?)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	61	20	14	59	44	59	26	25	48	35	58	9	47	44
4%	3%	5%	5%	4%	5%	4%	4%	7%	4%	5%	4%	4%	4%	4%
		a	a					acdf						
Fairly Dissatisfied	138	70	29	123	70	123	61	25	105	67	123	18	98	93
9%	9%	10%	7%	8%	8%	8%	9%	7%	8%	10%	8%	8%	8%	9%
Neither Satisfied Nor Dissatisfied	340	155	63	321	198	325	156	78	279	136	320	45	278	253
22%	20%	23%	24%	22%	22%	22%	22%	21%	22%	21%	22%	19%	23%	24%
Fairly Satisfied	582	293	112	540	346	553	265	143	473	246	549	96	454	411
37%	37%	41%	35%	37%	39%	37%	38%	38%	38%	38%	38%	42%	38%	38%
Very Satisfied	427	242	51	391	219	398	190	101	325	163	383	59	296	260
27%	31%	19%	27%	27%	25%	27%	27%	27%	26%	25%	26%	25%	25%	24%
	b	b	b											
Don't Know (DO NOT READ OUT)	20	11	4	20	12	20	6	3	16	6	20	5	20	14
1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%	2%	1%
NET: Satisfied	1010	535	163	931	565	951	455	244	797	409	932	155	750	672
64%	68%	60%	62%	64%	64%	64%	65%	65%	64%	63%	64%	67%	63%	62%
	b	b												
NET: Dissatisfied	200	91	43	182	114	182	87	50	153	102	181	26	145	137
13%	11%	16%	13%	13%	13%	12%	12%	13%	12%	16%	12%	11%	12%	13%
	b									b				

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Delivery consistency / reliability (e.g. arrives as promised consistently) (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	61 4%	11 4%	2 6%	47 4%	61 4%	57 4%	61 4%	51 4%	59 4%	- -%	32 4%	61 4%	13 4%	9 6%	16 7%	36 3%
Fairly Dissatisfied	138 9%	31 12%	* 1%	108 8%	130 9%	117 9%	132 9%	111 9%	136 9%	- -%	90 10%	136 9%	33 9%	13 9%	35 15%	90 8%
Neither Satisfied Nor Dissatisfied	340 22%	57 22%	10 29%	278 22%	336 22%	290 22%	337 22%	251 21%	338 22%	- -%	180 21%	335 22%	68 19%	24 17%	55 24%	261 22%
Fairly Satisfied	582 37%	106 41%	11 30%	467 36%	564 37%	484 37%	567 37%	433 37%	579 37%	- -%	340 39%	571 37%	148 42%	48 33%	75 32%	459 39%
Very Satisfied	427 27%	51 19%	12 33%	370 29% a	414 27%	351 27%	414 27%	313 27%	426 27%	2 100%	226 26%	410 27%	88 25%	49 34%	51 22%	326 27%
Don't Know (DO NOT READ OUT)	20 1%	4 2%	* -%	16 1%	20 1%	17 1%	20 1%	16 1%	20 1%	- -%	5 1%	20 1%	1 -%	1 1%	2 1%	17 1%
NET: Satisfied	1010 64%	157 60%	23 63%	838 65%	978 64%	835 63%	981 64%	745 64%	1004 64%	2 100%	567 65%	981 64%	235 67%	97 67%	126 53%	784 66%
NET: Dissatisfied	200 13%	42 16%	3 8%	155 12%	191 13%	174 13%	193 13%	162 14%	196 13%	- -%	122 14%	197 13%	46 13%	22 15%	52 22%	126 11%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Delivery consistency / reliability (e.g. arrives as promised consistently) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	61 4%	10 5%	5 5%	46 4%	47 4%	14 3%	56 4%	5 5%	2 *%	36 29% a	41 10% b	20 2%	9 3%	2 27%
Fairly Dissatisfied	138 9%	19 10%	12 12%	107 8%	99 9%	39 8%	134 9%	5 4%	27 3%	35 28% a	73 18% b	66 6%	37 11%	* 4%
Neither Satisfied Nor Dissatisfied	340 22%	43 23%	21 21%	274 22%	247 23% b	93 19%	324 22%	16 16%	145 14%	30 24% a	108 27% b	233 20%	78 22%	3 39%
Fairly Satisfied	582 37%	67 36%	37 36%	472 37%	396 37%	186 37%	542 37%	40 39%	445 43% b	13 11%	126 32%	456 39% a	131 38%	1 10%
Very Satisfied	427 27%	45 24%	26 25%	353 28%	263 25%	164 33% a	396 27%	32 31%	403 39% b	8 6%	46 12%	382 32% a	89 26%	1 20%
Don't Know (DO NOT READ OUT)	20 1%	2 1%	2 2%	16 1%	14 1%	6 1%	16 1%	4 4% a	16 1%	2 2%	2 1%	18 2%	4 1%	- -%
NET: Satisfied	1010 64%	112 60%	64 62%	825 65%	659 62%	350 70% a	938 64%	72 70%	849 82% b	21 17%	172 44%	838 71% a	220 63%	2 30%
NET: Dissatisfied	200 13%	29 16%	17 16%	154 12%	147 14%	53 11%	190 13%	10 10%	29 3%	70 57% a	113 29% b	86 7%	46 13%	2 31%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 39 (continuation)

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Delivery consistency / reliability (e.g. arrives as promised consistently) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	61 4%	21 5%	24 6%	6 2%	10 3%
		cd	cd		
Fairly Dissatisfied	138 9%	45 11%	36 9%	29 7%	29 8%
		c			
Neither Satisfied Nor Dissatisfied	340 22%	101 26%	75 19%	83 21%	82 21%
		b			
Fairly Satisfied	582 37%	131 34%	152 38%	166 42%	133 34%
				ad	
Very Satisfied	427 27%	87 22%	106 26%	105 26%	130 34%
					abc
Don't Know (DO NOT READ OUT)	20 1%	4 1%	7 2%	7 2%	3 1%
NET: Satisfied	1010 64%	218 56%	258 65%	270 68%	263 68%
			a	a	a
NET: Dissatisfied	200 13%	65 17%	60 15%	35 9%	39 10%
		cd	cd		

Columns Tested: a,b,c,d

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Time of collection (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?)

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Very Dissatisfied

Fairly Dissatisfied

Neither Satisfied Nor
Dissatisfied

Fairly Satisfied

Very Satisfied

Don't Know (DO NOT READ
OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1566	a	b	c	d	e	f	g	h	i	j	k	l	m
1570	66	103	76	117	109	198	129	115	85	209	188	171	998
	95	172	110	114	109	274	185	204	87	84	73	62	1350
31	2	7	5	*	1	5	2	2	4	1	1	*	29
2%	2%	4%	5%	*%	1%	2%	1%	1%	5%	1%	1%	1%	2%
		d	dl						dl				
67	4	7	6	1	4	20	7	9	3	2	2	2	61
4%	4%	4%	5%	1%	4%	7%	4%	4%	3%	2%	3%	4%	4%
						dj							
175	8	20	11	11	16	31	19	24	9	9	9	9	148
11%	8%	12%	10%	10%	15%	11%	10%	12%	10%	10%	12%	15%	11%
468	35	46	26	32	32	79	52	64	28	30	24	19	394
30%	37%	27%	23%	28%	30%	29%	28%	31%	32%	36%	34%	30%	29%
									c				
554	35	70	33	45	32	86	71	75	28	29	27	24	474
35%	37%	41%	30%	39%	29%	31%	38%	37%	33%	34%	37%	38%	35%
275	13	22	29	24	24	53	35	30	16	14	9	7	245
18%	13%	13%	27%	21%	22%	19%	19%	15%	18%	17%	12%	12%	18%
			bhkl	kl	kl								
1022	70	116	59	77	64	165	122	139	56	59	51	43	868
65%	73%	68%	54%	68%	59%	60%	66%	68%	65%	70%	71%	68%	64%
	c			c				c		cef	cef	c	
98	5	14	11	2	5	25	9	11	7	3	3	3	89
6%	6%	8%	10%	1%	5%	9%	5%	5%	8%	3%	5%	5%	7%
		dj	dj			dj			d				dj

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Time of collection (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	31 2%	30 2%	1 1%	- -	* 3%	- -	1 1%	25 2%	6 1%	31 2%	- -	15 1%	10 4%	4 4%	1 2%
Fairly Dissatisfied	67 4%	65 4%	1 4%	* 1%	* 5%	* 4%	2 3%	46 4%	21 5%	64 4%	3 5%	49 4%	10 3%	4 4%	5 5%
Neither Satisfied Nor Dissatisfied	175 11%	167 11%	5 14%	1 11%	* 7%	1 11%	8 12%	129 12%	46 10%	168 11%	7 13%	123 11%	28 10%	8 8%	17 18%
Fairly Satisfied	468 30%	446 30%	14 36%	3 36%	3 37%	2 27%	22 35%	328 29%	139 31%	452 30%	16 28%	324 30%	78 28%	33 32%	33 34%
Very Satisfied	554 35%	531 35%	13 33%	4 42%	3 42%	4 49%	23 37%	383 34%	171 38%	529 35%	25 43%	391 36%	98 35%	43 42%	22 23%
Don't Know (DO NOT READ OUT)	275 18%	268 18%	5 12%	1 10%	1 8%	1 9%	7 11%	204 18%	71 16%	268 18%	7 12%	190 17%	57 20%	11 11%	17 18%
NET: Satisfied	1022 65%	976 65%	26 69%	7 78%	6 78%	6 76%	45 72%	711 64%	311 68%	981 65%	41 70%	715 65%	176 63%	76 74%	55 57%
NET: Dissatisfied	98 6%	95 6%	2 5%	* 1%	1 7%	* 4%	3 5%	71 6%	27 6%	95 6%	3 5%	64 6%	20 7%	8 7%	7 7%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Time of collection (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	31	8	12	5	4	2	1	-	29	-	1	-	*	10	6	4	11
	2%	1%	4%	2%	2%	3%	2%	-%	2%	-%	3%	-%	2%	4%	5%	2%	5%
		a															
Fairly Dissatisfied	67	29	18	6	9	3	2	-	59	3	1	5	*	13	5	11	7
	4%	4%	6%	3%	4%	3%	8%	-%	4%	4%	2%	11%	1%	5%	4%	6%	3%
							c					a					
Neither Satisfied Nor Dissatisfied	175	72	38	24	29	8	2	1	157	5	6	1	6	25	11	17	18
	11%	10%	13%	10%	14%	10%	6%	15%	11%	7%	15%	3%	21%	9%	9%	10%	9%
											d		bd				
Fairly Satisfied	468	212	89	68	62	26	7	4	410	19	13	16	10	87	31	50	68
	30%	30%	29%	29%	29%	33%	27%	38%	30%	25%	33%	39%	34%	32%	27%	28%	32%
Very Satisfied	554	242	100	90	81	30	9	3	492	34	8	14	5	93	36	64	65
	35%	34%	33%	38%	38%	38%	32%	27%	36%	47%	21%	33%	18%	34%	31%	36%	31%
									ce	ace							
Don't Know (DO NOT READ OUT)	275	137	48	42	29	9	7	2	239	13	10	6	7	46	28	32	41
	18%	20%	16%	18%	14%	12%	25%	20%	17%	17%	27%	14%	24%	17%	24%	18%	19%
		d					de										
NET: Satisfied	1022	454	189	157	143	56	17	6	903	53	21	30	15	180	67	115	133
	65%	65%	62%	67%	67%	71%	59%	65%	65%	72%	53%	72%	52%	66%	57%	64%	63%
										ce							
NET: Dissatisfied	98	38	29	11	12	5	3	-	88	3	2	5	1	23	11	15	19
	6%	5%	10%	5%	6%	6%	10%	-%	6%	4%	5%	11%	3%	8%	10%	9%	9%
			ac														

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Time of collection (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?)

Base: All respondents who use Royal Mail

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	31 2%	12 1%	8 3%	12 2%	29 2%	18 2%	29 2%	20 3%	13 4%	27 2%	20 3%	27 2%	8 4%	22 2%	25 2%
Fairly Dissatisfied	67 4%	31 4%	21 8%	15 3%	62 4%	34 4%	65 4%	24 3%	13 3%	49 4%	26 4%	65 4%	7 3%	61 5%	49 5%
			ac												
Neither Satisfied Nor Dissatisfied	175 11%	90 11%	39 14% c	46 9%	159 11%	98 11%	163 11%	77 11%	36 10%	140 11%	74 11%	162 11%	21 9%	132 11%	121 11%
Fairly Satisfied	468 30%	260 33% c	74 27%	129 26%	437 30%	275 31%	443 30%	212 30%	111 30%	374 30%	197 30%	436 30%	75 33%	359 30%	332 31%
Very Satisfied	554 35%	271 34%	95 34%	185 38%	519 36%	323 36%	526 36%	243 34%	128 34%	440 35%	230 35%	518 36%	85 37%	426 36%	362 34%
Don't Know (DO NOT READ OUT)	275 18%	129 16%	38 14%	105 21% ab	247 17%	143 16%	253 17%	128 18%	73 20%	216 17%	106 16%	248 17%	35 15%	194 16%	187 17%
NET: Satisfied	1022 65%	531 67%	169 62%	314 64%	957 66%	598 67%	969 66%	455 65%	239 64%	814 65%	428 65%	954 66%	160 69%	784 66%	694 65%
NET: Dissatisfied	98 6%	43 5%	28 10% ac	27 5%	91 6%	52 6%	94 6%	44 6%	26 7%	75 6%	45 7%	91 6%	15 7%	83 7%	74 7%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Time of collection (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?)

Base: All respondents who use Royal Mail

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235
Very Dissatisfied	31	7	-	24	31	28	31	28	31	-	25	31	4	4	7
	2%	3%	-%	2%	2%	2%	2%	2%	2%	-	3%	2%	1%	2%	2%
Fairly Dissatisfied	67	14	-	52	65	60	65	48	66	-	44	66	20	6	13
	4%	6%	-%	4%	4%	5%	4%	4%	4%	-	5%	4%	6%	4%	4%
Neither Satisfied Nor Dissatisfied	175	29	3	144	170	148	172	122	174	-	95	172	46	14	30
	11%	11%	9%	11%	11%	11%	11%	10%	11%	-	11%	11%	13%	10%	13%
Fairly Satisfied	468	93	14	363	460	393	460	348	464	-	269	462	104	34	66
	30%	36%	39%	28%	30%	30%	30%	30%	30%	-	31%	30%	30%	23%	28%
Very Satisfied	554	63	14	483	536	451	536	412	550	-	309	536	124	57	76
	35%	24%	39%	38%	35%	34%	35%	35%	35%	-	35%	35%	35%	39%	32%
Don't Know (DO NOT READ OUT)	275	54	5	219	263	235	268	215	273	2	133	267	53	30	43
	18%	21%	13%	17%	17%	18%	17%	18%	18%	100%	15%	17%	15%	21%	18%
NET: Satisfied	1022	156	28	847	996	844	996	760	1014	-	578	998	228	90	142
	65%	60%	78%	66%	65%	64%	65%	65%	65%	-	66%	65%	65%	63%	60%
NET: Dissatisfied	98	21	-	77	96	88	96	76	98	-	69	97	23	9	20
	6%	8%	-%	6%	6%	7%	6%	6%	6%	-	8%	6%	7%	7%	8%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 40 (continuation)

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Time of collection (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?)

Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experinced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	31 2%	5 3%	2 2%	24 2%	20 2%	11 2%	29 2%	2 2%	7 1%	12 10% a	16 4% b	15 1%	13 4%	- -%
Fairly Dissatisfied	67 4%	6 3%	6 6%	55 4%	50 5%	17 3%	65 4%	2 2%	37 4%	9 8% a	20 5%	47 4%	12 4%	- -%
Neither Satisfied Nor Dissatisfied	175 11%	17 9%	12 12%	146 11%	124 12%	51 10%	165 11%	10 10%	81 8%	22 18% a	54 14%	121 10%	28 8%	* 2%
Fairly Satisfied	468 30%	59 32%	31 30%	374 29%	329 31%	138 28%	444 30%	23 23%	315 30% b	27 22%	121 31%	347 29%	109 31%	* 7%
Very Satisfied	554 35%	57 31%	32 31%	458 36%	374 35%	180 36%	510 35%	44 43%	438 42% b	25 21%	104 26%	450 38% a	121 35%	* 5%
Don't Know (DO NOT READ OUT)	275 18%	42 23%	20 19%	212 17%	170 16%	105 21% a	254 17%	21 20%	160 15%	27 22%	80 20%	195 17%	64 18%	6 86%
NET: Satisfied	1022 65%	116 62%	64 61%	832 66%	703 66%	318 63%	955 65%	67 66%	753 73% b	52 42%	225 57%	796 68% a	230 66%	1 12%
NET: Dissatisfied	98 6%	11 6%	8 8%	79 6%	70 7%	28 6%	94 6%	4 4%	45 4%	21 17% a	36 9% b	62 5%	25 7%	- -%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Time of collection (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?)
Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	31 2%	7 2%	12 3%	6 2%	5 1%
Fairly Dissatisfied	67 4%	18 5%	12 3%	15 4%	21 6%
Neither Satisfied Nor Dissatisfied	175 11%	25 6%	51 13%	51 13%	49 13%
Fairly Satisfied	468 30%	100 26%	112 28%	128 32%	128 33%
Very Satisfied	554 35%	125 32%	149 37%	139 35%	141 36%
Don't Know (DO NOT READ OUT)	275 18%	113 29%	63 16%	56 14%	42 11%
NET: Satisfied	1022 65%	225 58%	261 65%	267 67%	270 70%
NET: Dissatisfied	98 6%	25 6%	25 6%	22 5%	27 7%

Columns Tested: a,b,c,d

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Collection reliability (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?)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	5	-	*	2	-	-	-	-	2	-	1	-	-	4
	%	-%	%	2%	-%	-%	-%	-%	1%	-%	1%	-%	-%	%
Fairly Dissatisfied	14	2	3	*	-	-	5	*	-	1	1	1	-	12
	1%	2%	2%	%	-%	-%	2%	%	-%	1%	2%	2%	-%	1%
Neither Satisfied Nor Dissatisfied	129	6	14	13	8	12	18	13	18	10	6	5	5	112
	8%	6%	8%	12%	7%	11%	7%	7%	9%	11%	8%	7%	8%	8%
Fairly Satisfied	493	31	52	26	38	32	88	57	72	29	24	23	22	424
	31%	33%	30%	23%	33%	29%	32%	31%	35%	33%	29%	32%	35%	31%
Very Satisfied	614	40	79	31	49	33	95	78	85	29	39	32	25	519
	39%	42%	46%	29%	43%	30%	35%	42%	42%	33%	46%	44%	39%	38%
			ce		ce						cefm	ce		
Don't Know (DO NOT READ OUT)	314	16	25	38	19	32	67	37	27	19	13	11	11	279
	20%	17%	14%	34%	17%	29%	25%	20%	13%	21%	15%	15%	17%	21%
				abdg		bdghjklm	bhjk							
				lm										
NET: Satisfied	1107	71	130	57	87	65	183	134	157	57	63	55	47	943
	71%	75%	76%	52%	76%	59%	67%	73%	77%	66%	75%	76%	74%	70%
		ce	ce		ce		c	ce	ce		ce	ce	ce	ce
NET: Dissatisfied	19	2	3	2	-	-	5	*	2	1	2	1	-	16
	1%	2%	2%	2%	-%	-%	2%	%	1%	1%	2%	2%	-%	1%
											l			
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Collection reliability (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	5	4	*	*	-	-	1	5	-	5	*	*	*	2	2
	%	%	1%	1%	-%	-%	1%	%	-%	%	%	%	%	2%	2%
														ab	ab
Fairly Dissatisfied	14	13	1	-	-	-	1	13	1	14	*	10	2	*	2
	1%	1%	2%	-%	-%	-%	2%	1%	%	1%	1%	1%	1%	%	2%
			a												
Neither Satisfied Nor Dissatisfied	129	122	4	2	*	1	7	98	31	124	5	85	27	6	12
	8%	8%	12%	16%	5%	7%	11%	9%	7%	8%	9%	8%	10%	6%	12%
				a											
Fairly Satisfied	493	474	12	3	2	2	19	347	146	476	17	348	85	32	28
	31%	31%	32%	27%	35%	26%	31%	31%	32%	32%	29%	32%	30%	31%	30%
Very Satisfied	614	589	12	5	4	4	25	417	197	591	23	435	104	42	33
	39%	39%	33%	48%	54%	51%	40%	37%	43%	39%	39%	40%	37%	41%	35%
				b	ab	b			a						
Don't Know (DO NOT READ OUT)	314	304	8	1	*	1	10	235	79	301	13	214	62	20	18
	20%	20%	20%	7%	6%	16%	16%	21%	17%	20%	22%	20%	22%	20%	19%
		cd	cd												
NET: Satisfied	1107	1063	25	7	6	6	44	764	343	1068	40	783	189	74	61
	71%	71%	65%	76%	89%	77%	71%	69%	76%	71%	68%	72%	67%	72%	65%
				abf					a						
NET: Dissatisfied	19	18	1	*	-	-	2	18	1	19	*	10	2	2	5
	1%	1%	4%	1%	-%	-%	2%	2%	%	1%	1%	1%	1%	2%	5%
			a					b							ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Collection reliability (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	5	2	-	-	*	2	*	-	3	2	*	-	-	1	2	*	3
	%	%	-%	-%	%	3%	1%	-%	%	3%	%	-%	-%	%	2%	%	1%
						abcd				a							
Fairly Dissatisfied	14	4	3	4	3	*	*	-	12	-	-	2	*	6	2	6	3
	1%	1%	1%	2%	2%	1%	1%	-%	1%	-%	-%	4%	2%	2%	2%	3%	1%
												ab					
Neither Satisfied Nor Dissatisfied	129	48	38	12	24	5	2	1	120	4	5	1	-	20	8	13	14
	8%	7%	13%	5%	11%	6%	7%	15%	9%	6%	13%	2%	-%	7%	7%	7%	7%
			ace		ac						de						
Fairly Satisfied	493	220	99	81	60	26	6	2	427	25	11	15	16	97	29	57	69
	31%	31%	32%	35%	28%	33%	20%	20%	31%	33%	29%	36%	55%	36%	25%	32%	33%
		f	f	f									abc	b			
Very Satisfied	614	279	106	94	87	32	11	4	547	30	12	18	8	100	41	72	69
	39%	40%	35%	40%	41%	41%	38%	46%	39%	41%	31%	43%	26%	37%	35%	40%	33%
Don't Know (DO NOT READ OUT)	314	148	59	44	39	13	9	2	279	13	11	6	5	49	35	31	53
	20%	21%	19%	19%	18%	17%	34%	20%	20%	17%	28%	15%	17%	18%	30%	17%	25%
						abcde								a			
NET: Satisfied	1107	499	205	175	147	58	16	6	973	55	23	32	24	197	70	129	138
	71%	71%	67%	75%	69%	74%	58%	65%	70%	74%	59%	79%	81%	72%	60%	72%	66%
		f		f		f						c	c	b			
NET: Dissatisfied	19	6	3	4	4	3	*	-	15	2	*	2	*	7	4	6	6
	1%	1%	1%	2%	2%	3%	2%	-%	1%	3%	%	4%	2%	3%	3%	3%	3%
						a						a					

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 41 (continuation)

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Collection reliability (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?)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	5	3	*	5	5	5	5	2	5	5	5	1	3	5
	0%	0%	0%	0%	1%	0%	1%	1%	0%	1%	0%	0%	0%	0%
Fairly Dissatisfied	14	4	5	14	7	14	9	3	14	9	12	2	10	11
	1%	0%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
		a												
Neither Satisfied Nor Dissatisfied	129	62	39	121	76	121	58	25	101	54	120	16	97	89
	8%	8%	14%	8%	9%	8%	8%	7%	8%	8%	8%	7%	8%	8%
		ac												
Fairly Satisfied	493	259	90	460	280	466	228	117	402	217	462	75	367	370
	31%	33%	33%	32%	31%	32%	32%	31%	32%	33%	32%	33%	31%	34%
Very Satisfied	614	304	99	565	348	579	264	150	487	248	570	99	485	389
	39%	38%	36%	39%	39%	39%	37%	40%	39%	38%	39%	43%	41%	36%
			b										b	
Don't Know (DO NOT READ OUT)	314	161	41	290	173	293	141	78	236	121	285	37	231	213
	20%	20%	15%	20%	19%	20%	20%	21%	19%	18%	20%	16%	19%	20%
		b	b											
NET: Satisfied	1107	563	189	1025	628	1045	492	268	889	465	1032	174	853	758
	71%	71%	69%	70%	71%	71%	70%	71%	71%	71%	71%	76%	71%	70%
NET: Dissatisfied	19	6	5	19	12	19	14	5	19	14	17	3	13	16
	1%	1%	2%	1%	1%	1%	2%	1%	1%	2%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Collection reliability (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	5	2	-	3	5	5	5	5	5	-	3	5	1	-	2	3
	%	1%	-	%	%	%	%	%	%	-	%	%	%	-	1%	%
Fairly Dissatisfied	14	5	-	10	14	14	14	12	14	-	11	14	2	*	7	7
	1%	2%	-	1%	1%	1%	1%	1%	1%	-	1%	1%	1%	%	3%	1%
															c	
Neither Satisfied Nor Dissatisfied	129	20	-	109	123	104	124	91	128	-	75	123	26	8	25	97
	8%	8%	-	8%	8%	8%	8%	8%	8%	-	9%	8%	7%	5%	11%	8%
Fairly Satisfied	493	97	12	387	483	426	485	383	489	-	300	491	122	45	68	380
	31%	37%	33%	30%	32%	32%	32%	33%	31%	-	34%	32%	35%	31%	29%	32%
		c														
Very Satisfied	614	78	16	527	594	504	596	447	608	2	337	594	147	68	82	462
	39%	30%	44%	41%	39%	38%	39%	38%	39%	100%	39%	39%	42%	47%	35%	39%
				a										b		
Don't Know (DO NOT READ OUT)	314	58	8	250	305	263	309	236	314	-	149	305	53	23	51	240
	20%	22%	23%	19%	20%	20%	20%	20%	20%	-	17%	20%	15%	16%	22%	20%
												c				
NET: Satisfied	1107	175	28	914	1078	929	1081	830	1097	2	638	1085	268	113	150	842
	71%	67%	77%	71%	71%	71%	71%	71%	70%	100%	73%	71%	76%	78%	64%	71%
													b	b		b
NET: Dissatisfied	19	7	-	12	19	19	19	17	19	-	14	19	3	*	9	10
	1%	3%	-	1%	1%	1%	1%	1%	1%	-	2%	1%	1%	%	4%	1%
		c													ac	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 41 (continuation)

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Collection reliability (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?)
Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	5	1	2	2	3	5	-	*	5	5	*	2	-
	0%	0%	2%	0%	1%	0%	0%	0%	4%	1%	0%	1%	0%
			c						a	b			
Fairly Dissatisfied	14	-	3	10	4	13	1	1	6	12	3	5	-
	1%	0%	3%	1%	1%	1%	1%	0%	5%	3%	0%	1%	0%
			a						a	b			
Neither Satisfied Nor Dissatisfied	129	15	11	103	38	121	9	46	21	42	87	20	-
	8%	8%	11%	8%	8%	8%	9%	4%	17%	11%	7%	6%	0%
									a	b			
Fairly Satisfied	493	52	34	404	147	463	30	313	28	129	364	118	*
	31%	28%	33%	32%	29%	32%	29%	30%	23%	33%	31%	34%	4%
Very Satisfied	614	69	31	507	218	571	43	498	30	104	510	133	1
	39%	37%	30%	40%	43%	39%	42%	48%	24%	26%	43%	38%	10%
					a			b			a		
Don't Know (DO NOT READ OUT)	314	50	22	240	94	294	19	180	34	103	211	70	6
	20%	27%	22%	19%	19%	20%	19%	17%	27%	26%	18%	20%	86%
		c							a	b			
NET: Satisfied	1107	121	65	912	364	1034	73	811	58	233	874	251	1
	71%	65%	63%	72%	72%	70%	71%	78%	47%	59%	74%	72%	14%
								b			a		
NET: Dissatisfied	19	1	5	14	7	18	1	1	11	17	3	7	-
	1%	0%	5%	1%	1%	1%	1%	0%	9%	4%	0%	2%	0%
			ac						a	b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Collection reliability (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?)
Base: All respondents who use Royal Mail

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%	a	b	c	d
Unweighted total	1566	398	404	389
Weighted total	1570	387	400	396
Very Dissatisfied	5	*	2	*
	*%	*%	*%	*%
Fairly Dissatisfied	14	3	3	6
	1%	1%	1%	1%
Neither Satisfied Nor Dissatisfied	129	20	36	32
	8%	5%	9%	8%
		a	a	a
Fairly Satisfied	493	97	146	134
	31%	25%	37%	34%
		a	a	a
Very Satisfied	614	139	149	173
	39%	36%	37%	44%
			a	
Don't Know (DO NOT READ OUT)	314	129	65	52
	20%	33%	16%	13%
		bcd		
NET: Satisfied	1107	236	295	306
	71%	61%	74%	77%
		a	a	a
NET: Dissatisfied	19	3	4	6
	1%	1%	1%	2%

Columns Tested: a,b,c,d

Availability of a daily collection (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?)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	16	2	2	4	-	-	4	2	-	*	1	1	-	13
	1%	2%	1%	3%	-%	-%	1%	1%	-%	*%	2%	1%	-%	1%
				dhl										
Fairly Dissatisfied	34	4	2	*	2	3	16	*	-	4	1	2	*	31
	2%	4%	1%	*%	1%	2%	6%	*%	-%	5%	1%	3%	*%	2%
		hl					cghjlm			ghl				
Neither Satisfied Nor Dissatisfied	137	4	12	9	13	14	20	15	24	6	8	5	7	118
	9%	4%	7%	8%	12%	13%	7%	8%	12%	7%	9%	7%	11%	9%
Fairly Satisfied	467	35	54	34	31	34	79	45	64	27	22	24	19	403
	30%	37%	32%	31%	27%	31%	29%	24%	32%	31%	26%	32%	30%	30%
Very Satisfied	699	42	84	46	49	42	107	98	96	32	40	33	30	597
	45%	44%	49%	42%	43%	39%	39%	53%	47%	37%	47%	46%	47%	44%
							efl							
Don't Know (DO NOT READ OUT)	216	9	18	16	19	16	47	26	20	17	13	7	7	188
	14%	10%	10%	15%	16%	15%	17%	14%	10%	20%	15%	10%	12%	14%
						k				hk				
NET: Satisfied	1167	77	138	80	81	76	187	142	160	59	62	57	48	1000
	74%	81%	80%	73%	71%	70%	68%	77%	78%	68%	73%	79%	77%	74%
			f								f			
NET: Dissatisfied	50	5	5	4	2	3	20	2	-	4	2	3	*	44
	3%	6%	3%	4%	1%	2%	7%	1%	-%	5%	3%	4%	*%	3%
		hl		hl			dghjlm			hl	l	hl		hl
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Availability of a daily collection (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	16	15	*	*	-	-	*	12	3	16	-	9	3	4	*
	1%	1%	3%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	4%	3%
Fairly Dissatisfied	34	32	1	*	*	-	2	23	11	33	1	26	3	2	3
	2%	2%	3%	1%	7%	1%	3%	2%	3%	2%	2%	2%	1%	2%	3%
Neither Satisfied Nor Dissatisfied	137	132	2	1	1	*	5	106	31	130	7	103	20	3	11
	9%	9%	6%	12%	10%	6%	7%	10%	7%	9%	12%	9%	7%	3%	11%
Fairly Satisfied	467	447	13	3	2	2	21	315	152	451	17	330	70	34	34
	30%	30%	36%	33%	28%	29%	34%	28%	33%	30%	29%	30%	25%	33%	36%
Very Satisfied	699	672	16	4	4	4	28	495	205	673	27	488	132	45	34
	45%	45%	42%	46%	50%	50%	45%	44%	45%	45%	46%	45%	47%	44%	36%
Don't Know (DO NOT READ OUT)	216	209	5	1	*	1	7	163	52	209	7	135	52	15	13
	14%	14%	13%	6%	6%	15%	11%	15%	12%	14%	12%	12%	19%	15%	14%
NET: Satisfied	1167	1118	30	8	6	6	49	810	357	1124	43	818	202	79	68
	74%	74%	78%	79%	78%	79%	78%	73%	78%	74%	74%	75%	72%	77%	71%
NET: Dissatisfied	50	48	1	*	*	-	2	35	15	49	1	35	6	6	3
	3%	3%	3%	3%	7%	1%	3%	3%	3%	3%	2%	3%	2%	5%	3%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 42 (continuation)

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Availability of a daily collection (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	16 1%	9 1%	2 1%	2 1%	2 1%	* %	- -	- -	15 1%	- -	* %	* %	- -	1 %	4 3% a	* %	5 2% a
Fairly Dissatisfied	34 2%	13 2%	6 2%	6 2%	8 4%	1 1%	1 2%	- -	31 2%	* %	- -	2 6% b	1 2%	11 4%	2 2%	7 4%	6 3%
Neither Satisfied Nor Dissatisfied	137 9%	60 9%	34 11%	20 9%	16 7%	4 5%	1 5%	1 15%	128 9% c	4 5%	* %	4 11% c	* 2%	28 10%	5 4%	18 10%	15 7%
Fairly Satisfied	467 30%	210 30%	88 29%	69 29%	69 32%	22 28%	8 29%	2 21%	404 29%	20 27%	16 42%	12 29%	15 51% abd	82 30%	26 22%	56 31%	51 24%
Very Satisfied	699 45%	314 45%	136 45%	102 44%	91 43%	41 52%	11 39%	4 45%	623 45%	39 52% ce	13 34%	16 39%	9 30%	117 43%	47 40%	71 40%	92 44%
Don't Know (DO NOT READ OUT)	216 14%	94 13%	38 13%	35 15%	28 13%	11 14%	7 26% abcde	2 20%	185 13%	11 15%	9 23% a	6 15%	5 15%	34 13%	34 29% a	26 15%	42 20%
NET: Satisfied	1167 74%	524 75%	224 74%	171 73%	160 75%	62 80% f	19 67%	6 65%	1027 74%	59 80%	29 76%	28 68%	24 81%	199 73% b	72 62%	128 71%	143 68%
NET: Dissatisfied	50 3%	22 3%	9 3%	8 3%	10 4%	1 1%	1 2%	- -	46 3%	* %	* %	2 6% b	1 2%	13 5%	6 5%	8 4%	11 5%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 42 (continuation)

Page 402

Availability of a daily collection (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?)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	16	7	5	15	6	15	7	5	14	9	15	4	13	12
	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%
Fairly Dissatisfied	34	10	13	32	22	33	16	8	30	22	31	3	29	27
	2%	1%	5%	2%	2%	2%	2%	2%	2%	3%	2%	1%	2%	2%
		ac								c				
Neither Satisfied Nor Dissatisfied	137	67	36	120	76	128	63	43	100	60	127	18	105	84
	9%	8%	13%	8%	9%	9%	9%	11%	8%	9%	9%	8%	9%	8%
		ac						af						
Fairly Satisfied	467	236	73	435	263	443	218	106	379	188	440	73	354	345
	30%	30%	27%	30%	30%	30%	31%	28%	30%	29%	30%	32%	30%	32%
Very Satisfied	699	364	117	650	403	658	301	151	552	294	648	112	540	463
	45%	46%	42%	45%	45%	44%	43%	40%	44%	45%	45%	49%	45%	43%
Don't Know (DO NOT READ OUT)	216	108	31	202	119	202	99	62	171	81	194	21	152	146
	14%	14%	11%	14%	13%	14%	14%	16%	14%	12%	13%	9%	13%	14%
NET: Satisfied	1167	600	190	1085	666	1101	520	257	930	482	1088	185	894	807
	74%	76%	69%	75%	75%	74%	74%	69%	75%	74%	75%	80%	75%	75%
		b		e	e	e		e	e			a		
NET: Dissatisfied	50	17	18	48	28	48	23	13	44	31	46	7	42	38
	3%	2%	7%	3%	3%	3%	3%	3%	4%	5%	3%	3%	4%	4%
		ac												

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 42 (continuation)

Page 403

Availability of a daily collection (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?)
Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	16	3	-	13	16	13	16	14	16	-	11	16	3	*	2	13
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
Fairly Dissatisfied	34	6	-	28	34	34	34	31	34	-	27	34	4	*	9	25
	2%	2%	-%	2%	2%	3%	2%	3%	2%	-%	3%	2%	1%	1%	4%	2%
											c				a	
Neither Satisfied Nor Dissatisfied	137	19	*	118	134	112	137	104	135	-	79	136	35	9	26	102
	9%	7%	1%	9%	9%	9%	9%	9%	9%	-%	9%	9%	10%	6%	11%	9%
Fairly Satisfied	467	105	11	355	452	395	453	343	464	-	269	459	110	37	61	370
	30%	40%	32%	28%	30%	30%	30%	29%	30%	-%	31%	30%	31%	25%	26%	31%
		c														
Very Satisfied	699	91	18	598	679	578	680	511	693	2	391	679	169	80	95	522
	45%	35%	50%	46%	45%	44%	44%	44%	44%	100%	45%	44%	48%	55%	40%	44%
				a										bc		
Don't Know (DO NOT READ OUT)	216	37	6	176	211	183	213	170	216	-	99	210	31	18	41	156
	14%	14%	17%	14%	14%	14%	14%	14%	14%	-%	11%	14%	9%	13%	18%	13%
												c				
NET: Satisfied	1167	196	29	952	1131	973	1133	855	1157	2	659	1138	278	116	156	892
	74%	75%	81%	74%	74%	74%	74%	73%	74%	100%	75%	74%	79%	81%	66%	75%
													b	b		b
NET: Dissatisfied	50	9	-	41	50	47	50	44	50	-	38	50	7	1	11	38
	3%	3%	-%	3%	3%	4%	3%	4%	3%	-%	4%	3%	2%	1%	5%	3%
											c				a	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 42 (continuation)

Page 404

Availability of a daily collection (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?)
Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	16 1%	2 1%	2 2%	11 1%	5 1%	15 1%	* %	7 1%	6 5% a	6 2%	9 1%	4 1%	- -%
Fairly Dissatisfied	34 2%	1 1%	4 4%	29 2%	8 2%	32 2%	2 2%	10 1%	14 11% a	19 5% b	15 1%	11 3%	- -%
Neither Satisfied Nor Dissatisfied	137 9%	16 9%	5 5%	116 9%	97 9%	127 9%	10 10%	54 5%	17 14% a	30 7%	107 9%	22 6%	- -%
Fairly Satisfied	467 30%	45 24%	40 39% a	379 30%	145 29%	437 30%	30 29%	288 28%	29 23%	132 33%	336 29%	97 28%	* 2%
Very Satisfied	699 45%	80 43%	40 38%	573 45%	455 43%	653 44%	47 46% a	556 54% b	32 26%	139 35%	560 48% a	156 45%	1 12%
Don't Know (DO NOT READ OUT)	216 14%	41 22% bc	12 12%	161 13%	156 15%	203 14%	13 13%	123 12%	25 20% a	69 17% b	147 13%	57 16%	6 86%
NET: Satisfied	1167 74%	126 67%	80 77%	952 75% a	777 73%	1090 74%	77 75% a	844 81% b	61 50%	271 69%	896 76% a	253 73%	1 14%
NET: Dissatisfied	50 3%	4 2%	6 6%	40 3%	37 3%	47 3%	3 3%	17 2%	20 16% a	25 6%	25 2%	16 5%	- -%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 42 (continuation)

Page 405

Availability of a daily collection (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?)
Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	16	6	4	4	2
	1%	1%	1%	1%	1%
Fairly Dissatisfied	34	7	9	9	10
	2%	2%	2%	2%	2%
Neither Satisfied Nor Dissatisfied	137	20	29	49	38
	9%	5%	7%	12%	10%
			ab	a	
Fairly Satisfied	467	88	125	126	129
	30%	23%	31%	32%	33%
			a	a	
Very Satisfied	699	152	179	187	181
	45%	39%	45%	47%	47%
			a	a	
Don't Know (DO NOT READ OUT)	216	115	53	22	27
	14%	30%	13%	5%	7%
		bcd	cd		
NET: Satisfied	1167	240	304	312	310
	74%	62%	76%	79%	80%
			a	a	a
NET: Dissatisfied	50	12	13	13	12
	3%	3%	3%	3%	3%

Columns Tested: a,b,c,d

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Table 43

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Latest collection time (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?)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	30 2%	* %	2 1%	7 7%	2 1%	1 1%	4 1%	5 3%	2 1%	3 3%	2 2%	* 1%	1 1%	27 2%
				aefhklm										
Fairly Dissatisfied	98 6%	9 10%	5 3%	9 8%	7 6%	6 5%	24 9%	15 8%	7 3%	5 6%	4 5%	5 7%	3 4%	86 6%
Neither Satisfied Nor Dissatisfied	216 14%	15 16%	24 14%	13 12%	12 10%	21 20% k	44 16% k	22 12%	23 11%	12 14%	11 12%	7 9%	13 20% dhjkm	186 14%
Fairly Satisfied	469 30%	31 33%	54 32%	26 23%	28 25%	28 26%	86 31%	51 25%	78 38%	24 28%	24 28%	22 30%	16 25%	407 30%
							cdel							
Very Satisfied	531 34%	31 32%	70 41% f	35 32%	43 38%	33 30%	76 28%	69 37%	68 33%	25 29%	30 35%	28 38% f	22 35%	452 33%
Don't Know (DO NOT READ OUT)	226 14%	9 9%	15 9%	20 18%	23 20% b	20 18%	40 15%	22 12%	26 13%	17 20% b	14 17%	11 15%	9 14%	193 14%
NET: Satisfied	1000 64%	62 65%	125 73% cefil	61 55%	71 63%	61 56%	162 59%	120 65%	146 71% cefi	50 57%	54 63%	50 69% cef	38 60%	858 64%
NET: Dissatisfied	128 8%	9 10%	7 4%	16 15% bhjl	8 7%	7 6%	27 10%	20 11%	9 4%	8 9%	6 7%	5 7%	3 5%	113 8%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 43 (continuation) Page 407

Latest collection time (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	30	28	1	*	1	-	1	14	16	30	*	18	6	2	4
	2%	2%	2%	1%	9%	-%	2%	1%	4%	2%	1%	2%	2%	2%	4%
				abef					a						
Fairly Dissatisfied	98	94	3	*	*	1	4	74	24	95	4	69	18	8	3
	6%	6%	7%	3%	6%	8%	6%	7%	5%	6%	6%	6%	6%	8%	3%
														d	
Neither Satisfied Nor Dissatisfied	216	208	6	1	*	1	8	160	56	207	9	150	34	20	12
	14%	14%	16%	12%	5%	9%	13%	14%	12%	14%	15%	14%	12%	20%	12%
														b	
Fairly Satisfied	469	448	13	4	2	2	20	317	152	449	19	325	77	28	38
	30%	30%	33%	39%	32%	25%	33%	28%	33%	30%	33%	30%	28%	27%	40%
									a						abc
Very Satisfied	531	509	12	4	3	3	22	381	150	511	20	383	93	29	26
	34%	34%	31%	39%	42%	45%	36%	34%	33%	34%	34%	35%	33%	29%	27%
												d			
Don't Know (DO NOT READ OUT)	226	220	4	1	*	1	6	169	57	220	6	145	53	15	13
	14%	15%	11%	6%	6%	13%	10%	15%	12%	15%	11%	13%	19%	15%	14%
		f											a		
NET: Satisfied	1000	957	24	7	5	5	43	698	301	960	39	709	170	57	64
	64%	63%	64%	78%	74%	70%	68%	63%	66%	64%	67%	65%	61%	56%	67%
				a								c			c
NET: Dissatisfied	128	122	3	*	1	1	5	88	40	124	4	88	24	10	6
	8%	8%	9%	4%	15%	8%	9%	8%	9%	8%	7%	8%	8%	10%	7%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 43 (continuation)

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Latest collection time (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	30 2%	5 1%	15 5% ae	5 2%	5 2%	* 2%	1 2%	- -%	26 2%	2 2%	1 3%	1 1%	- -%	9 3%	2 2%	7 4%	4 2%
Fairly Dissatisfied	98 6%	49 7%	18 6%	12 5%	14 7%	3 3%	2 9%	- -%	93 7% b	1 1%	4 11% bde	- -%	* *%	20 7%	12 10%	10 6%	21 10%
Neither Satisfied Nor Dissatisfied	216 14%	95 14%	49 16%	32 14%	30 14%	9 11%	2 8%	* 1%	191 14%	11 15%	3 8%	6 15%	5 16%	29 10%	17 15%	21 11%	25 12%
Fairly Satisfied	469 30%	209 30%	85 28%	70 30%	65 30%	28 36%	8 29%	3 35%	401 29%	25 34%	12 31%	18 43% a	13 44% a	87 32%	28 24%	55 31%	60 29%
Very Satisfied	531 34%	242 35%	100 33%	83 35%	64 30%	27 34%	10 37%	4 43%	483 35%	21 29%	9 24%	10 25%	7 25%	94 34%	32 28%	61 34%	65 31%
Don't Know (DO NOT READ OUT)	226 14%	100 14%	39 13%	33 14%	36 17%	11 14%	5 16%	2 20%	193 14%	14 18%	8 21%	6 15%	5 15%	35 13%	26 22% a	26 14%	35 17%
NET: Satisfied	1000 64%	452 64%	185 61%	153 65%	129 60%	55 71%	18 65%	8 79%	883 64%	47 63%	21 56%	28 68%	20 68%	181 66% b	61 52%	116 65%	126 60%
NET: Dissatisfied	128 8%	54 8%	32 11% e	17 7%	19 9%	3 4%	3 11%	- -%	119 9%	3 4%	6 15% bde	1 1%	* *%	29 11%	13 11%	17 10%	25 12%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 43 (continuation)

Page 409

Latest collection time (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?)
Base: All respondents who use Royal Mail

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	30 2%	15 2%	8 3%	6 1%	29 2%	20 2%	29 2%	13 2%	6 2%	25 2%	14 2%	29 2%	5 2%	28 2%	25 2%
Fairly Dissatisfied	98 6%	51 6%	25 9%	22 5%	92 6%	61 7%	94 6%	55 8%	27 7%	75 6%	49 7%	91 6%	10 4%	83 7%	74 7%
Neither Satisfied Nor Dissatisfied	216 14%	107 14%	54 20% ac	55 11%	197 14%	126 14%	202 14%	100 14%	47 12%	170 14%	102 16%	199 14%	43 19% b	163 14%	149 14%
Fairly Satisfied	469 30%	232 29%	80 29%	152 31%	434 30%	269 30%	440 30%	227 32%	123 33%	373 30%	209 32%	440 30%	76 33%	361 30%	334 31%
Very Satisfied	531 34%	278 35% b	76 28%	174 35% b	491 34%	303 34%	500 34%	213 30%	113 30%	417 33%	200 31%	488 34%	77 33%	399 33%	350 32%
Don't Know (DO NOT READ OUT)	226 14%	109 14%	32 12%	82 17%	211 15%	110 12%	213 14%	97 14%	59 16%	186 15%	80 12%	206 14% c	19 8%	160 13%	145 14%
NET: Satisfied	1000 64%	510 64% b	156 57%	326 66% b	925 64%	573 64%	940 64%	440 62%	236 63%	790 63%	409 63%	929 64%	153 67%	760 64%	683 63%
NET: Dissatisfied	128 8%	66 8%	32 12% c	29 6%	122 8%	81 9%	123 8%	68 10%	33 9%	100 8%	63 10%	121 8%	15 6%	111 9%	98 9%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Latest collection time (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	30	5	2	23	30	28	30	25	30	-	24	30	10	3	9	17
	2%	2%	6%	2%	2%	2%	2%	2%	2%	-%	3%	2%	3%	2%	4%	1%
Fairly Dissatisfied	98	23	1	75	95	83	96	77	98	-	61	97	16	7	26	65
	6%	9%	3%	6%	6%	6%	6%	7%	6%	-%	7%	6%	5%	5%	11%	5%
		c													ac	
Neither Satisfied Nor Dissatisfied	216	32	4	182	207	184	209	160	213	-	127	213	69	20	27	168
	14%	12%	10%	14%	14%	14%	14%	14%	14%	-%	15%	14%	20%	14%	12%	14%
													ab			
Fairly Satisfied	469	92	11	369	456	408	458	360	467	-	274	459	115	37	63	369
	30%	35%	30%	29%	30%	31%	30%	31%	30%	-%	31%	30%	33%	26%	27%	31%
		c														
Very Satisfied	531	63	14	459	516	428	516	375	525	2	294	516	113	58	71	400
	34%	24%	40%	36%	34%	33%	34%	32%	34%	100%	34%	34%	32%	40%	30%	34%
			a	a										b		
Don't Know (DO NOT READ OUT)	226	46	4	179	221	184	222	176	226	-	95	218	28	19	39	169
	14%	17%	11%	14%	14%	14%	15%	15%	15%	-%	11%	14%	8%	13%	16%	14%
												ac				
NET: Satisfied	1000	155	25	828	973	836	974	735	992	2	567	975	228	96	134	769
	64%	59%	70%	64%	64%	64%	64%	63%	64%	100%	65%	64%	65%	66%	57%	65%
																b
NET: Dissatisfied	128	28	3	98	125	111	126	103	127	-	85	127	26	10	35	83
	8%	11%	9%	8%	8%	8%	8%	9%	8%	-%	10%	8%	7%	7%	15%	7%
															ac	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 43 (continuation)

Page 411

Latest collection time (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?)
Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	30 2%	2 1%	2 2%	26 2%	22 2%	8 2%	30 2%	* %	11 1%	10 8%	17 4%	12 1%	9 3%	- -%
Fairly Dissatisfied	98 6%	12 6%	4 4%	82 6%	74 7%	24 5%	95 6%	3 3%	48 5%	14 11%	30 8%	68 6%	29 8%	- -%
Neither Satisfied Nor Dissatisfied	216 14%	29 15%	9 9%	176 14%	165 15%	51 10%	206 14%	10 9%	117 11%	18 15%	62 16%	154 13%	36 10%	- -%
Fairly Satisfied	469 30%	63 34%	40 39%	363 29%	313 29%	155 31%	445 30%	24 24%	294 28%	27 22%	122 31%	347 30%	102 29%	1 9%
Very Satisfied	531 34%	46 25%	34 33%	446 35%	342 32%	189 38%	482 33%	49 48%	431 42%	27 22%	103 26%	428 36%	121 35%	* 3%
Don't Know (DO NOT READ OUT)	226 14%	35 19%	14 13%	176 14%	150 14%	76 15%	209 14%	17 17%	137 13%	26 21%	61 15%	165 14%	51 15%	6 88%
NET: Satisfied	1000 64%	109 58%	74 72%	809 64%	655 61%	344 69%	927 63%	73 71%	725 70%	55 45%	225 57%	775 66%	223 64%	1 12%
NET: Dissatisfied	128 8%	14 7%	6 6%	108 9%	97 9%	31 6%	125 9%	3 3%	59 6%	24 19%	48 12%	80 7%	37 11%	- -%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 43 (continuation)

Page 412

Latest collection time (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?)
Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	30 2%	8 2%	11 3%	3 1%	7 2%
			c		
Fairly Dissatisfied	98 6%	23 6%	25 6%	26 7%	24 6%
Neither Satisfied Nor Dissatisfied	216 14%	32 8%	50 13%	64 16%	69 18%
			a	ab	
Fairly Satisfied	469 30%	105 27%	103 26%	138 35%	122 32%
			ab		
Very Satisfied	531 34%	111 29%	150 37%	132 33%	138 36%
			a	a	
Don't Know (DO NOT READ OUT)	226 14%	108 28%	60 15%	32 8%	27 7%
		bcd	cd		
NET: Satisfied	1000 64%	216 56%	253 63%	271 68%	260 67%
			a	a	
NET: Dissatisfied	128 8%	31 8%	37 9%	29 7%	31 8%

Columns Tested: a,b,c,d

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Table 44 Page 413

Account management (if applicable) (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?)

Base: All respondents who use Royal Mail

TOTAL	GOR													
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England	
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	k	l	m	
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	3	-	-	*	-	-	2	-	-	-	*	*	-	2
*%		-%	-%	-%	-%	-%	1%	-%	-%	-%	1%	-%	-%	-%
Fairly Dissatisfied	2	2	-	-	-	-	-	-	-	-	-	-	1	2
*%		2%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%
		jm												
Neither Satisfied Nor Dissatisfied	7	*	1	*	-	3	*	*	2	-	1	-	*	6
*%		-%	1%	-%	-%	2%	-%	-%	1%	-%	1%	-%	-%	-%
					fk	m								
Fairly Satisfied	8	*	*	-	1	*	2	-	-	1	1	1	1	5
*%		-%	-%	-%	1%	-%	1%	-%	-%	1%	2%	1%	1%	-%
										m				
Very Satisfied	28	*	7	-	1	1	4	6	4	*	1	1	2	24
2%		-%	4%	-%	1%	1%	1%	3%	2%	-%	2%	1%	3%	2%
Don't Know (DO NOT READ OUT)	1522	93	163	110	111	105	266	179	198	85	81	71	59	1311
97%		98%	95%	100%	98%	96%	97%	97%	97%	98%	95%	98%	95%	97%
NET: Satisfied	35	*	7	-	3	2	6	6	4	1	3	1	2	29
2%		-%	4%	-%	2%	2%	2%	3%	2%	2%	3%	2%	4%	2%
NET: Dissatisfied	5	2	-	*	-	-	2	-	-	-	*	*	1	4
*%		2%	-%	-%	-%	-%	1%	-%	-%	-%	1%	-%	1%	-%
		m												

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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Table 44 (continuation)

Page 414

Account management (if applicable) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	3	2	-	-	-	*	*	3	-	2	*	*	-	*	2
	%	%	-%	-%	-%	3%	%	%	-%	%	%	%	-%	%	2%
						abf									ab
Fairly Dissatisfied	2	2	-	-	*	-	*	1	2	2	-	-	*	-	2
	%	%	-%	-%	2%	-%	%	%	%	%	-%	-%	%	-%	2%
					a										ab
Neither Satisfied Nor Dissatisfied	7	5	1	1	1	*	2	3	4	7	*	2	*	1	4
	%	%	1%	8%	8%	2%	3%	%	1%	%	%	%	%	1%	4%
				ab	ab		a								ab
Fairly Satisfied	8	6	1	*	*	*	1	4	3	6	2	2	2	*	3
	%	%	2%	1%	3%	1%	2%	%	1%	%	3%	%	1%	%	4%
			a		a		a				a				abc
Very Satisfied	28	26	1	*	1	*	2	18	10	27	1	17	5	1	5
	2%	2%	1%	1%	15%	6%	4%	2%	2%	2%	1%	2%	2%	1%	5%
					abcf	ab	a								ab
Don't Know (DO NOT READ OUT)	1522	1466	36	9	5	7	57	1087	435	1467	56	1070	273	100	79
	97%	97%	95%	89%	72%	87%	90%	97%	96%	97%	95%	98%	97%	98%	83%
		cdef	def	d			d					d	d	d	
NET: Satisfied	35	32	1	*	1	1	4	22	13	33	2	19	7	1	8
	2%	2%	4%	3%	18%	8%	6%	2%	3%	2%	4%	2%	2%	1%	9%
					abcf	a	a								abc
NET: Dissatisfied	5	5	-	-	*	*	*	3	2	5	*	*	*	*	4
	%	%	-%	-%	2%	3%	1%	%	%	%	%	%	%	%	4%
						ab									abc

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 44 (continuation)

Page 415

Account management (if applicable) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	3	-	-	*	2	-	-	*	1	-	-	2	*	2	-	2	-
	*%	-%	-%	*%	1%	-%	-%	1%	*%	-%	-%	4%	*%	1%	-%	1%	-%
					a							ab					
Fairly Dissatisfied	2	-	-	*	-	-	*	2	*	-	2	*	-	2	-	2	-
	*%	-%	-%	*%	-%	-%	*%	18%	*%	-%	5%	*%	-%	1%	-%	1%	-%
											ab						
Neither Satisfied Nor Dissatisfied	7	*	2	*	2	1	-	2	4	*	1	-	2	3	*	2	2
	*%	*%	1%	*%	1%	1%	-%	18%	*%	1%	2%	-%	8%	1%	*%	1%	1%
					a						a		ab				
Fairly Satisfied	8	2	*	2	1	*	*	2	5	-	*	1	2	1	*	1	1
	*%	*%	*%	1%	*%	*%	2%	21%	*%	-%	*%	3%	6%	*%	*%	1%	*%
						b					a		ab				
Very Satisfied	28	5	3	14	2	1	1	2	25	1	1	*	*	4	1	1	3
	2%	1%	1%	6%	1%	2%	4%	18%	2%	1%	2%	1%	1%	2%	1%	1%	2%
				abd			a										
Don't Know (DO NOT READ OUT)	1522	694	300	218	206	76	27	2	1352	73	35	37	25	261	116	171	205
	97%	99%	98%	93%	96%	97%	94%	23%	97%	98%	91%	91%	85%	96%	99%	96%	97%
		cdf	cf						cde	ce							
NET: Satisfied	35	7	3	15	3	2	2	4	30	1	1	2	2	5	1	2	4
	2%	1%	1%	7%	1%	2%	6%	39%	2%	1%	3%	4%	7%	2%	1%	1%	2%
				abd			abd										
NET: Dissatisfied	5	-	-	1	2	-	*	2	1	-	2	2	*	4	-	4	-
	*%	-%	-%	*%	1%	-%	*%	20%	*%	-%	5%	5%	*%	1%	-%	2%	-%
					a						ab	ab				b	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 44 (continuation)

Page 416

Account management (if applicable) (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?)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	3	1	2	3	*	3	3	1	3	2	3	*	2	2
*%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
Fairly Dissatisfied	2	*	2	2	2	2	2	*	2	1	2	1	1	2
*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
Neither Satisfied Nor Dissatisfied	7	2	4	7	7	7	7	3	7	5	7	3	7	4
*%	*%	*%	1%	*%	1%	*%	1%	1%	1%	1%	*%	1%	1%	*%
Fairly Satisfied	8	2	5	8	5	8	6	3	6	6	7	3	6	6
*%	*%	*%	1%	1%	1%	1%	1%	1%	*%	1%	*%	1%	*%	1%
Very Satisfied	28	13	10	28	18	28	15	8	23	9	26	1	22	20
2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	1%	2%	*%	2%	2%
Don't Know (DO NOT READ OUT)	1522	775	268	469	856	1431	672	360	1204	631	1409	223	1156	1041
97%	98%	98%	95%	97%	96%	97%	95%	96%	97%	97%	97%	97%	97%	97%
c														
NET: Satisfied	35	15	5	35	24	35	21	11	29	15	33	4	28	26
2%	2%	2%	3%	2%	3%	2%	3%	3%	2%	2%	2%	2%	2%	2%
NET: Dissatisfied	5	*	4	5	3	5	5	1	5	2	5	1	2	4
*%	*%	*%	1%	*%	*%	*%	1%	*%	*%	*%	*%	*%	*%	*%
			a											

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 44 (continuation)

Page 417

Account management (if applicable) (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	3	-	-	3	3	3	3	3	3	-	2	3	*	-	*	2
	%	-%	-%	%	%	%	%	%	%	-%	%	%	%	-%	%	%
Fairly Dissatisfied	2	*	-	2	2	2	2	2	2	-	1	1	1	2	-	1
	%	%	-%	%	%	%	%	%	%	-%	%	%	%	1%	-%	%
Neither Satisfied Nor Dissatisfied	7	1	-	6	7	6	7	6	7	-	5	7	4	2	*	4
	%	1%	-%	%	%	%	%	%	%	-%	1%	%	1%	2%	%	%
Fairly Satisfied	8	3	1	5	8	7	8	7	8	-	4	8	3	2	*	5
	%	1%	2%	%	1%	1%	%	1%	%	-%	%	%	1%	1%	%	%
Very Satisfied	28	7	*	21	28	20	28	24	26	-	11	28	3	2	2	24
	2%	3%	1%	2%	2%	1%	2%	2%	2%	-%	1%	2%	1%	1%	1%	2%
Don't Know (DO NOT READ OUT)	1522	250	35	1250	1478	1278	1485	1132	1513	2	852	1488	339	137	232	1151
	97%	96%	98%	97%	97%	97%	97%	96%	97%	100%	97%	97%	97%	94%	99%	97%
NET: Satisfied	35	9	1	26	35	27	35	31	33	-	15	35	6	4	2	29
	2%	4%	2%	2%	2%	2%	2%	3%	2%	-%	2%	2%	2%	3%	1%	2%
NET: Dissatisfied	5	*	-	5	5	5	5	5	5	-	3	3	1	2	*	3
		%	-%	%	%	%	%	%	%	-%	%	%	%	1%	%	%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 44 (continuation)

Page 418

Account management (if applicable) (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?)
Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	3	-	2	1	1	2	3	-	*	2	3	-	*	-
	1%	-%	2%	1%	1%	2%	1%	-	1%	2%	1%	-	1%	-
			c							a				
Fairly Dissatisfied	2	2	*	*	1	2	2	-	2	-	*	2	2	-
	1%	1%	1%	1%	1%	1%	1%	-	1%	-	1%	1%	1%	-
		c												
Neither Satisfied Nor Dissatisfied	7	2	4	1	5	3	7	-	2	*	3	4	3	*
	1%	1%	4%	1%	1%	1%	1%	-	1%	1%	1%	1%	1%	4%
		c	c											
Fairly Satisfied	8	*	*	7	3	5	8	*	7	-	1	7	1	-
	1%	1%	1%	1%	1%	1%	1%	1%	1%	-	1%	1%	1%	-
Very Satisfied	28	2	-	23	17	11	28	-	19	-	4	24	5	-
	2%	1%	-	2%	2%	2%	2%	-	2%	-	1%	2%	1%	-
Don't Know (DO NOT READ OUT)	1522	180	97	1237	1042	481	1420	102	1007	120	384	1138	337	6
	97%	97%	94%	97%	98%	96%	97%	100%	97%	98%	97%	97%	97%	96%
				b										
NET: Satisfied	35	3	*	30	20	15	35	*	26	-	5	30	6	-
	2%	2%	1%	2%	2%	3%	2%	1%	3%	-	1%	3%	2%	-
NET: Dissatisfied	5	2	2	1	1	4	5	-	2	2	3	2	2	-
	1%	1%	2%	1%	1%	1%	1%	-	1%	2%	1%	1%	1%	-
		c	c			a				a				

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 44 (continuation)

Page 419

Account management (if applicable) (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?)

Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	3	1	-	-	2
	*%	*%	-%	-%	*%
Fairly Dissatisfied	2	2	-	-	*
	*%	*%	-%	-%	*%
Neither Satisfied Nor Dissatisfied	7	6	*	1	1
	*%	1%	*%	*%	*%
		bc			
Fairly Satisfied	8	2	3	1	2
	*%	*%	1%	*%	*%
Very Satisfied	28	11	3	9	4
	2%	3%	1%	2%	1%
		b			
Don't Know (DO NOT READ OUT)	1522	366	393	385	378
	97%	95%	98%	97%	98%
			a		a
NET: Satisfied	35	13	6	10	6
	2%	3%	1%	3%	2%
NET: Dissatisfied	5	2	-	-	2
	*%	1%	-%	-%	1%

Columns Tested: a,b,c,d

Trustworthiness of the provider (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?)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	26 2%	- -%	4 2%	4 3%	1 1%	6 6%	4 1%	2 1%	- -%	3 3%	1 1%	1 1%	- -%	24 2%
			l	hl		adfgghijklm				l				
Fairly Dissatisfied	42 3%	6 6%	2 1%	* 1%	3 2%	- -%	9 3%	5 3%	8 4%	3 3%	1 2%	3 4%	2 2%	37 3%
		ce							e			e		
Neither Satisfied Nor Dissatisfied	222 14%	9 9%	27 16%	22 20%	12 11%	11 10%	44 16%	35 19%	27 13%	7 8%	9 11%	7 10%	11 17%	195 14%
				ijk				ijk					k	
Fairly Satisfied	594 38%	35 37%	51 30%	42 38%	41 36%	44 40%	110 40%	61 33%	91 45%	43 49%	35 42%	20 28%	20 33%	518 38%
						k	k		bkl	bgklm	bk		k	
Very Satisfied	673 43%	44 46%	87 51%	37 34%	54 47%	48 44%	107 39%	82 44%	76 37%	31 36%	37 44%	41 57%	30 48%	565 42%
			chl									cefgghijlm	c	
Don't Know (DO NOT READ OUT)	12 1%	2 2%	- -%	5 5%	3 2%	- -%	- -%	- -%	2 1%	- -%	- -%	* 1%	* 1%	12 1%
		j		befgijk	lm	fj								
NET: Satisfied	1267 81%	79 83%	138 80%	79 72%	95 83%	92 84%	217 79%	143 77%	167 82%	74 85%	73 86%	61 85%	50 80%	1083 80%
										cgm		c		
NET: Dissatisfied	68 4%	6 6%	7 4%	4 4%	4 4%	6 6%	13 5%	7 4%	8 4%	6 6%	3 3%	4 5%	2 2%	61 4%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Trustworthiness of the provider (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	26	25	*	-	-	*	*	18	7	26	*	14	4	4	4
	2%	2%	1%	-%	-%	2%	1%	2%	2%	2%	1%	1%	1%	4%	4%
													a	a	a
Fairly Dissatisfied	42	41	1	*	*	*	2	29	13	42	*	34	3	1	4
	3%	3%	2%	2%	6%	3%	3%	3%	3%	3%	1%	3%	1%	1%	5%
														b	b
Neither Satisfied Nor Dissatisfied	222	212	6	2	1	1	10	159	63	212	9	139	36	22	26
	14%	14%	15%	20%	13%	14%	16%	14%	14%	14%	16%	13%	13%	21%	27%
													ab	ab	ab
Fairly Satisfied	594	567	18	3	3	2	27	433	161	573	21	429	93	36	36
	38%	38%	48%	35%	46%	27%	43%	39%	35%	38%	36%	39%	33%	35%	37%
			ae				e								
Very Satisfied	673	650	13	4	2	4	23	465	209	646	27	465	145	38	25
	43%	43%	33%	43%	35%	52%	37%	42%	46%	43%	47%	43%	52%	37%	27%
		bf				bf						d	acd		
Don't Know (DO NOT READ OUT)	12	12	*	-	-	*	*	10	2	12	*	11	-	1	*
	1%	1%	1%	-%	-%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%
NET: Satisfied	1267	1217	31	7	6	6	50	898	369	1219	48	894	238	74	61
	81%	81%	81%	77%	80%	79%	80%	81%	81%	81%	83%	82%	85%	73%	64%
												cd	cd		
NET: Dissatisfied	68	66	1	*	*	*	2	48	21	68	1	48	7	5	8
	4%	4%	3%	2%	6%	5%	3%	4%	5%	4%	1%	4%	2%	5%	9%
														ab	ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Page 422

Trustworthiness of the provider (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?)
Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	26 2%	12 2%	7 2%	1 1%	3 1%	1 2%	2 7%	* 1%	21 2%	4 5%	1 3%	* *%	* *%	1 *%	7 6%	- -	8 4%
							abcd			a					a		a
Fairly Dissatisfied	42 3%	20 3%	11 4%	5 2%	6 3%	1 1%	1 3%	- -%	37 3%	* *%	1 2%	2 5%	2 7%	9 3%	4 3%	5 3%	8 4%
												b	b				
Neither Satisfied Nor Dissatisfied	222 14%	101 14%	46 15%	20 8%	34 16%	16 21%	5 16%	- -%	190 14%	4 6%	8 20%	15 37%	5 16%	45 17%	23 20%	29 16%	39 18%
			c		c	c				b	b	abe					
Fairly Satisfied	594 38%	252 36%	115 38%	97 42%	87 41%	26 34%	9 31%	7 76%	514 37%	41 55%	13 35%	13 31%	13 45%	106 39%	36 31%	69 39%	73 34%
										acd							
Very Satisfied	673 43%	309 44%	125 41%	108 46%	83 39%	34 43%	12 44%	2 23%	613 44%	25 34%	15 39%	11 27%	9 31%	111 41%	45 39%	76 42%	80 38%
									bd								
Don't Know (DO NOT READ OUT)	12 1%	7 1%	2 1%	3 1%	* *%	- -%	* *%	- -%	12 1%	- -%	* *%	- -%	- -%	2 1%	2 2%	- -	4 2%
NET: Satisfied	1267 81%	562 80%	240 79%	205 88%	170 80%	60 77%	21 74%	10 99%	1127 81%	66 89%	28 74%	24 58%	23 77%	217 79%	81 69%	145 81%	153 72%
				abdef					d	cd				b		b	
NET: Dissatisfied	68 4%	31 4%	17 6%	6 3%	9 4%	2 2%	3 9%	* 1%	58 4%	4 5%	2 6%	2 5%	2 8%	10 4%	11 9%	5 3%	16 7%
							ce							a		a	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Trustworthiness of the provider (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?)

Base: All respondents who use Royal Mail

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	1566	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	26	14	9	3	22	14	22	10	7	16	11	21	2	16	14
	2%	2%	3%	1%	2%	2%	1%	1%	2%	1%	2%	1%	1%	1%	1%
			c												
Fairly Dissatisfied	42	17	11	11	39	19	39	22	5	33	20	39	6	37	28
	3%	2%	4%	2%	3%	2%	3%	3%	1%	3%	3%	3%	3%	3%	3%
							e								
Neither Satisfied Nor Dissatisfied	222	95	59	67	200	126	203	105	52	171	105	199	31	166	160
	14%	12%	22%	14%	14%	14%	14%	15%	14%	14%	16%	14%	13%	14%	15%
			ac												
Fairly Satisfied	594	317	86	184	554	340	563	273	144	488	249	554	86	454	425
	38%	40%	32%	37%	38%	38%	38%	39%	38%	39%	38%	38%	37%	38%	40%
		b													
Very Satisfied	673	345	108	219	629	384	639	290	166	526	263	629	104	508	442
	43%	43%	40%	45%	43%	43%	43%	41%	44%	42%	40%	43%	45%	43%	41%
Don't Know (DO NOT READ OUT)	12	6	-	6	10	7	12	4	2	11	6	12	1	12	7
	1%	1%	-	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
NET: Satisfied	1267	661	195	404	1183	724	1202	563	309	1014	512	1183	190	962	868
	81%	83%	71%	82%	81%	81%	81%	80%	83%	81%	78%	81%	82%	81%	81%
		b		b											
NET: Dissatisfied	68	30	20	14	61	33	61	32	12	50	31	60	8	53	42
	4%	4%	7%	3%	4%	4%	4%	5%	3%	4%	5%	4%	4%	4%	4%
			ac												

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Trustworthiness of the provider (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?)
Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	26	4	*	21	26	25	26	21	26	-	16	26	4	1	7	18
	2%	2%	1%	2%	2%	2%	2%	2%	2%	-%	2%	2%	1%	1%	3%	2%
Fairly Dissatisfied	42	13	-	30	42	35	42	36	42	-	23	42	9	2	14	27
	3%	5%	-%	2%	3%	3%	3%	3%	3%	-%	3%	3%	3%	1%	6%	2%
		c													ac	
Neither Satisfied Nor Dissatisfied	222	46	4	174	212	192	215	170	218	-	128	217	47	22	41	158
	14%	18%	11%	14%	14%	15%	14%	15%	14%	-%	15%	14%	13%	15%	18%	13%
Fairly Satisfied	594	117	18	465	580	497	583	443	588	-	353	582	128	48	94	452
	38%	45%	50%	36%	38%	38%	38%	38%	38%	-%	40%	38%	36%	33%	40%	38%
		c														
Very Satisfied	673	81	14	584	653	556	655	492	671	2	348	654	159	69	79	524
	43%	31%	38%	45%	43%	42%	43%	42%	43%	100%	40%	43%	45%	48%	34%	44%
				a										b		b
Don't Know (DO NOT READ OUT)	12	-	-	12	12	12	12	10	12	-	7	12	3	3	*	9
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	2%	1%	1%
														b		
NET: Satisfied	1267	198	32	1050	1233	1052	1237	935	1260	2	701	1236	287	116	173	976
	81%	76%	88%	82%	81%	80%	81%	80%	81%	100%	80%	81%	82%	80%	74%	82%
				a												b
NET: Dissatisfied	68	17	*	51	68	59	68	57	68	-	39	68	13	3	20	45
	4%	7%	1%	4%	4%	5%	4%	5%	4%	-%	5%	4%	4%	2%	9%	4%
															ac	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Trustworthiness of the provider (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?)
Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	26	7	1	18	21	5	24	2	2	17	21	5	8	-
	2%	4%	1%	1%	2%	1%	2%	2%	1%	14%	5%	1%	2%	-%
		c								a	b			
Fairly Dissatisfied	42	4	7	32	31	11	38	5	5	17	30	13	11	-
	3%	2%	6%	3%	3%	2%	3%	5%	1%	14%	7%	1%	3%	-%
			c							a	b			
Neither Satisfied Nor Dissatisfied	222	36	18	167	160	62	211	10	66	31	112	110	57	4
	14%	20%	17%	13%	15%	12%	14%	10%	6%	25%	28%	9%	16%	61%
		c								a	b			
Fairly Satisfied	594	70	46	478	401	193	561	33	370	35	147	447	126	1
	38%	37%	44%	38%	38%	38%	38%	32%	36%	28%	37%	38%	36%	9%
Very Satisfied	673	68	32	563	446	227	621	52	587	21	83	590	143	2
	43%	37%	31%	44%	42%	45%	42%	51%	57%	17%	21%	50%	41%	30%
				b					b			a		
Don't Know (DO NOT READ OUT)	12	1	*	11	7	5	12	-	8	3	2	10	4	-
	1%	1%	1%	1%	1%	1%	1%	-%	1%	3%	1%	1%	1%	-%
NET: Satisfied	1267	138	77	1041	848	420	1183	85	957	55	230	1037	269	3
	81%	74%	75%	82%	79%	84%	81%	83%	92%	45%	58%	88%	77%	39%
				a					b			a		
NET: Dissatisfied	68	10	8	50	52	16	61	7	7	34	51	18	19	-
	4%	6%	8%	4%	5%	3%	4%	7%	1%	27%	13%	2%	5%	-%
									a		b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Trustworthiness of the provider (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?)

Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	26	7	7	3	9
	2%	2%	2%	1%	2%
Fairly Dissatisfied	42	12	12	5	13
	3%	3%	3%	1%	3%
Neither Satisfied Nor Dissatisfied	222	49	59	62	52
	14%	13%	15%	16%	14%
Fairly Satisfied	594	169	150	152	123
	38%	44%	38%	38%	32%
Very Satisfied	673	147	172	168	186
	43%	38%	43%	42%	48%
Don't Know (DO NOT READ OUT)	12	3	-	6	3
	1%	1%	0%	1%	1%
				b	
NET: Satisfied	1267	316	322	320	309
	81%	82%	81%	81%	80%
NET: Dissatisfied	68	20	19	8	22
	4%	5%	5%	2%	6%
		c	c		c

Columns Tested: a,b,c,d

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Table 46

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Amount / level of lost mail (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?)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1566	66	103	76	117	109	198	129	115	85	209	188	171	998
Weighted total	1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
Very Dissatisfied	47	6	1	5	1	7	6	5	6	4	2	2	1	41
	3%	6%	*	5%	1%	6%	2%	3%	3%	5%	3%	3%	2%	3%
		b		b		bd								
Fairly Dissatisfied	93	13	9	6	7	7	15	6	17	6	4	3	2	85
	6%	14%	5%	5%	6%	6%	5%	3%	8%	6%	5%	4%	3%	6%
		fgjiklm												
Neither Satisfied Nor Dissatisfied	261	7	27	16	25	13	48	40	33	11	13	12	14	221
	17%	8%	16%	15%	22%	12%	18%	22%	16%	13%	16%	17%	23%	16%
					ae			ae					ae	
Fairly Satisfied	549	33	57	49	32	44	88	66	65	37	32	25	19	472
	35%	34%	33%	45%	28%	41%	32%	36%	32%	43%	38%	35%	31%	35%
				dfl	d					d				
Very Satisfied	549	31	71	26	44	37	95	64	70	28	31	28	25	465
	35%	32%	41%	24%	38%	34%	35%	35%	34%	32%	37%	39%	40%	34%
			c	c	c					c	c	c	c	
Don't Know (DO NOT READ OUT)	71	6	7	7	5	1	22	4	13	1	2	2	1	66
	5%	6%	4%	7%	5%	1%	8%	2%	6%	1%	2%	3%	1%	5%
		l		l			egijkl		l					l
NET: Satisfied	1098	64	128	75	75	81	183	130	135	65	63	53	45	937
	70%	67%	75%	69%	66%	74%	67%	70%	66%	75%	75%	74%	71%	69%
NET: Dissatisfied	140	18	10	11	8	14	21	11	24	10	6	5	3	126
	9%	19%	6%	10%	7%	12%	8%	6%	12%	11%	7%	7%	5%	9%
		bdfgijkl				l			l					
		m												
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Amount / level of lost mail (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
Very Dissatisfied	47 3%	45 3%	1 4%	- -	* 6%	* 2%	2 3%	29 3%	18 4%	45 3%	2 3%	30 3%	3 1%	5 5%	8 8%
														b ab	
Fairly Dissatisfied	93 6%	89 6%	2 6%	1 8%	1 8%	* 2%	4 6%	63 6%	30 7%	90 6%	3 5%	56 5%	16 6%	11 11%	10 11%
														a ab	
Neither Satisfied Nor Dissatisfied	261 17%	249 17%	7 19%	2 24%	1 18%	1 14%	12 19%	177 16%	84 18%	255 17%	6 10%	164 15%	53 19%	18 18%	25 26%
															a
Fairly Satisfied	549 35%	528 35%	14 36%	3 35%	3 41%	1 15%	21 34%	409 37%	140 31%	524 35%	25 43%	391 36%	98 35%	32 31%	28 30%
		e	e	e	e	e	e	b							
Very Satisfied	549 35%	528 35%	12 31%	3 30%	2 25%	5 59%	21 34%	380 34%	170 37%	530 35%	20 34%	389 36%	107 38%	32 31%	22 23%
						abcd						d	d		
Don't Know (DO NOT READ OUT)	71 5%	68 5%	2 4%	* 3%	* 3%	1 9%	3 5%	58 5%	13 3%	68 4%	3 5%	61 6%	4 1%	4 4%	2 2%
NET: Satisfied	1098 70%	1056 70%	25 67%	6 65%	5 66%	6 74%	42 67%	789 71%	310 68%	1053 70%	45 77%	780 71%	205 73%	64 62%	50 53%
												cd	cd		
NET: Dissatisfied	140 9%	134 9%	4 10%	1 8%	1 14%	* 4%	6 9%	92 8%	48 11%	136 9%	4 7%	87 8%	19 7%	16 16%	18 19%
														ab	ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 46 (continuation)

Page 429

Amount / level of lost mail (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Very Dissatisfied	47 3%	25 4%	8 3%	6 2%	4 2%	3 4%	1 2%	- -%	36 3%	4 5%	2 6%	2 5%	2 8%	7 3%	9 7% a	2 1%	13 6% a
Fairly Dissatisfied	93 6%	29 4%	27 9% ad	18 7%	8 4%	8 11% ad	3 11% ad	* 3%	76 5%	3 4%	1 4%	8 19% abc	5 16% abc	19 7%	4 4%	14 8%	10 5%
Neither Satisfied Nor Dissatisfied	261 17%	96 14%	47 15%	34 15%	56 26% abc	17 22% a	10 36% abce	- -%	219 16%	11 15%	9 23%	9 21%	13 43% abcd	61 22%	23 20%	47 26% b	37 17%
Fairly Satisfied	549 35%	241 34%	119 39% df	79 34%	65 31%	34 44% df	8 27%	3 35%	484 35%	31 42% e	14 37%	14 34%	6 20%	101 37%	40 34%	63 35%	78 37%
Very Satisfied	549 35%	268 38% bef	96 32% e	92 39% ef	70 33% e	13 16%	7 24%	4 41%	505 36% de	21 29% e	11 30%	8 20%	4 13%	78 29%	41 35%	48 27%	71 34%
Don't Know (DO NOT READ OUT)	71 5%	42 6% bc	8 3%	6 3%	10 5%	2 3%	* 1%	2 20%	66 5%	4 5%	* 1%	- -%	* % *	6 2%	* % *	4 2%	2 1%
NET: Satisfied	1098 70%	509 73% def	215 71% ef	171 73% def	135 63%	47 60%	14 51%	7 77%	988 71% de	52 71% e	26 66% e	22 54% e	10 33%	180 66%	81 69%	112 62%	149 71%
NET: Dissatisfied	140 9%	54 8%	35 11% d	23 10%	12 6%	12 15% ad	4 13% d	* 3%	112 8%	7 9%	4 10%	10 24% ab	7 24% ab	26 10%	13 11%	16 9%	23 11%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 46 (continuation)

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Amount / level of lost mail (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?)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Very Dissatisfied	47	16	12	43	20	43	22	10	37	25	41	5	37	26
3%	2%	4%	3%	3%	2%	3%	3%	3%	3%	4%	3%	2%	3%	2%
		a												
Fairly Dissatisfied	93	40	26	86	58	86	47	32	72	40	88	12	70	73
6%	5%	10%	5%	6%	7%	6%	7%	9%	6%	6%	6%	5%	6%	7%
		ac						acf						
Neither Satisfied Nor Dissatisfied	261	110	50	252	165	254	131	80	207	122	247	51	207	203
17%	14%	18%	20%	17%	18%	17%	19%	21%	17%	19%	17%	22%	17%	19%
		a						acf				b		
Fairly Satisfied	549	278	102	507	321	517	258	121	451	257	515	78	420	396
35%	35%	37%	33%	35%	36%	35%	37%	32%	36%	39%	35%	34%	35%	37%
Very Satisfied	549	307	73	513	287	522	219	121	431	193	507	77	413	340
35%	39%	27%	34%	35%	32%	35%	31%	32%	35%	30%	35%	33%	35%	32%
	b		b			d					a			
Don't Know (DO NOT READ OUT)	71	41	11	54	38	57	27	10	47	16	56	7	47	37
5%	5%	4%	3%	4%	4%	4%	4%	3%	4%	2%	4%	3%	4%	3%
NET: Satisfied	1098	585	175	1020	609	1039	477	242	882	450	1022	155	833	736
70%	74%	64%	68%	70%	68%	70%	68%	65%	71%	69%	70%	67%	70%	68%
	bc			e		e			e					
NET: Dissatisfied	140	56	39	128	78	128	69	43	109	65	129	17	107	99
9%	7%	14%	9%	9%	9%	9%	10%	11%	9%	10%	9%	7%	9%	9%
		ac												

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Amount / level of lost mail (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
Very Dissatisfied	47 3%	11 4%	1 4%	35 3%	47 3%	42 3%	47 3%	37 3%	47 3%	- -%	32 4%	47 3%	11 3%	6 4%	8 3%	32 3%
Fairly Dissatisfied	93 6%	30 11%	- -%	64 5%	93 6%	80 6%	93 6%	71 6%	91 6%	- -%	58 7%	93 6%	20 6%	8 6%	20 8%	65 5%
		bc														
Neither Satisfied Nor Dissatisfied	261 17%	56 21%	11 31%	197 15%	250 16%	229 17%	252 16%	204 17%	259 17%	- -%	163 19%	255 17%	66 19%	21 15%	45 19%	193 16%
Fairly Satisfied	549 35%	101 39%	10 29%	443 34%	537 35%	474 36%	542 35%	414 35%	546 35%	- -%	315 36%	541 35%	122 35%	53 37%	70 30%	425 36%
Very Satisfied	549 35%	56 21%	11 31%	488 38%	530 35%	442 34%	530 35%	403 34%	546 35%	2 100%	282 32%	529 34%	117 33%	52 36%	86 36%	412 35%
Don't Know (DO NOT READ OUT)	71 5%	8 3%	2 5%	60 5%	68 4%	49 4%	68 4%	44 4%	69 4%	- -%	24 3%	69 5%	14 4%	4 2%	6 3%	61 5%
				a							a					
NET: Satisfied	1098 70%	156 60%	22 60%	930 72%	1067 70%	916 70%	1072 70%	817 70%	1092 70%	2 100%	597 68%	1070 70%	239 68%	105 73%	156 66%	837 70%
NET: Dissatisfied	140 9%	40 15%	1 4%	99 8%	140 9%	121 9%	140 9%	108 9%	138 9%	- -%	90 10%	140 9%	31 9%	15 10%	28 12%	97 8%
		c														

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 46 (continuation)

Page 432

Amount / level of lost mail (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?)
Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	503	1468	102	1038	123	395	1175	348	7
Very Dissatisfied	47	7	8	31	36	41	5	6	24	36	11	14	*
	3%	4%	8%	2%	3%	3%	5%	1%	19%	9%	1%	4%	2%
		c						a	b				
Fairly Dissatisfied	93	18	12	62	68	87	6	27	17	57	37	21	2
	6%	10%	11%	5%	6%	6%	6%	3%	14%	14%	3%	6%	32%
		c	c					a	b				
Neither Satisfied Nor Dissatisfied	261	30	23	203	182	241	19	127	26	117	144	69	3
	17%	16%	23%	16%	17%	16%	19%	12%	21%	30%	12%	20%	39%
								a	b				
Fairly Satisfied	549	73	28	447	383	524	25	366	40	130	419	127	-
	35%	39%	27%	35%	36%	36%	24%	35%	32%	33%	36%	36%	-
		b				b							
Very Satisfied	549	55	32	459	364	508	41	464	10	40	510	113	2
	35%	30%	31%	36%	34%	35%	40%	45%	8%	10%	43%	32%	27%
						b				a			
Don't Know (DO NOT READ OUT)	71	3	*	67	34	66	5	47	6	15	55	4	-
	5%	2%	%	5%	3%	4%	5%	5%	5%	4%	5%	1%	-
			ab		a								
NET: Satisfied	1098	128	60	906	747	1032	66	830	50	170	929	239	2
	70%	69%	58%	71%	70%	70%	65%	80%	41%	43%	79%	69%	27%
			b					b		a			
NET: Dissatisfied	140	25	20	93	104	129	12	33	40	93	47	35	2
	9%	13%	19%	7%	10%	9%	11%	3%	33%	23%	4%	10%	34%
		c	c					a	b				

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 46 (continuation)

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Amount / level of lost mail (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?)

Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
Very Dissatisfied	47	11	14	10	12
	3%	3%	4%	3%	3%
Fairly Dissatisfied	93	21	28	27	17
	6%	6%	7%	7%	4%
Neither Satisfied Nor Dissatisfied	261	74	80	55	51
	17%	19%	20%	14%	13%
		d	cd		
Fairly Satisfied	549	146	115	138	150
	35%	38%	29%	35%	39%
		b			b
Very Satisfied	549	120	154	134	142
	35%	31%	39%	34%	37%
			a		
Don't Know (DO NOT READ OUT)	71	16	9	31	16
	5%	4%	2%	8%	4%
			abd		
NET: Satisfied	1098	266	269	272	291
	70%	69%	67%	69%	75%
					abc
NET: Dissatisfied	140	32	42	37	28
	9%	8%	10%	9%	7%

Columns Tested: a,b,c,d

Daily delivery (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?)

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Very Dissatisfied

Fairly Dissatisfied

Neither Satisfied Nor
Dissatisfied

Fairly Satisfied

Very Satisfied

Don't Know (DO NOT READ
OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
764	a	b	c	d	e	f	g	h	i	j	k	l	m
783	35	48	39	52	55	86	52	62	35	103	105	92	464
9	53	84	63	53	58	116	82	112	37	43	45	37	657
1%	2	*	-	3	-	4	-	-	-	*	-	-	8
	4%	*%	-%	5%	-%	3%	-%	-%	-%	1%	1%	-%	1%
11	2	2	2		1	-	2	-	-	1	1	*	9
1%	3%	3%	3%	-%	2%	-%	2%	-%	-%	2%	2%	1%	1%
144	6	11	20	14	13	29	14	22	5	2	4	3	135
18%	11%	13%	31%	27%	23%	25%	18%	19%	14%	6%	10%	8%	20%
			abjkl	jkl	jkl	jkl	j	jl					jkl
273	14	20	23	14	20	44	28	42	24	13	15	14	231
35%	27%	24%	37%	27%	35%	38%	34%	38%	66%	30%	34%	37%	35%
								abcdeghijklm					
340	29	50	18	22	23	39	38	46	7	26	24	19	272
43%	55%	59%	29%	41%	40%	34%	46%	41%	19%	60%	53%	51%	41%
	cfi	cfim		i	i		i	i		cdefhm	cfim	cfi	i
4	-	-	-	-	-	-	-	2	-	*	*	1	2
*%	-%	-%	-%	-%	-%	-%	-%	2%	-%	1%	*%	3%	*%
												m	
614	43	70	42	36	43	83	66	88	31	39	39	33	503
78%	82%	84%	66%	68%	75%	72%	80%	79%	86%	90%	87%	88%	77%
										cdefhm	cfim	cdefm	
21	4	2	2	3	1	4	2	-	-	1	1	*	17
3%	7%	3%	3%	5%	2%	3%	2%	-%	-%	3%	3%	1%	3%
	h												

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Table 47 (continuation)

Page 435

Daily delivery (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	764	620	80	22	16	26	144	489	275	699	65	519	131	45	69
Weighted total	783	758	14	4	3	4	24	542	241	750	33	573	124	37	48
Very Dissatisfied	9	9	*	-	-	-	*	7	2	9	-	2	4	2	2
	1%	1%	3%	-%	-%	-%	2%	1%	1%	1%	-%	*%	3%	4%	4%
												a	a	a	a
Fairly Dissatisfied	11	11	*	-	-	-	*	7	5	11	*	7	2	-	2
	1%	1%	1%	-%	-%	-%	1%	1%	2%	1%	1%	1%	2%	-%	4%
Neither Satisfied Nor Dissatisfied	144	141	1	1	1	*	3	104	40	141	4	105	19	6	14
	18%	19%	8%	14%	34%	12%	12%	19%	17%	19%	11%	18%	16%	16%	29%
		b													ab
Fairly Satisfied	273	263	7	1	1	1	10	208	66	263	11	200	36	19	18
	35%	35%	51%	37%	31%	29%	43%	38%	27%	35%	33%	35%	30%	51%	38%
			a					b						ab	
Very Satisfied	340	330	5	2	1	2	10	213	127	322	18	258	60	10	12
	43%	44%	36%	50%	35%	59%	42%	39%	53%	43%	55%	45%	49%	27%	26%
								a				cd	cd		
Don't Know (DO NOT READ OUT)	4	4	*	-	-	-	*	3	*	4	-	2	1	*	*
	*%	*%	1%	-%	-%	-%	*%	1%	*%	*%	-%	*%	1%	1%	*%
NET: Satisfied	614	593	12	3	2	4	21	421	193	585	29	457	97	29	30
	78%	78%	87%	86%	66%	88%	85%	78%	80%	78%	87%	80%	78%	78%	63%
												d	d		
NET: Dissatisfied	21	20	1	-	-	-	1	14	7	20	*	9	6	2	4
	3%	3%	5%	-%	-%	-%	3%	3%	3%	3%	1%	2%	5%	4%	8%
												a			a

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 47 (continuation)

Page 436

Daily delivery (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	*f	*g	a	b	*c	*d	*e	a	b	a	b
Unweighted total	764	369	115	97	103	51	27	2	671	31	23	22	17	107	53	67	93
Weighted total	783	422	117	105	96	35	8	*	711	28	16	19	9	105	60	64	102
Very Dissatisfied	9	*	4	2	3	-	*	-	8	-	-	2	-	4	-	4	1
	1%	1%	3%	2%	3%	-%	4%	-%	1%	-%	-%	9%	-%	4%	-%	6%	1%
			a	a	a												
Fairly Dissatisfied	11	4	3	1	2	*	-	-	10	2	-	-	-	*	4	-	4
	1%	1%	3%	1%	2%	1%	-%	-%	1%	6%	-%	-%	-%	1%	6%	-%	4%
										a					a		
Neither Satisfied Nor Dissatisfied	144	76	27	15	20	4	2	*	130	6	5	4	*	12	12	9	15
	18%	18%	23%	14%	21%	12%	29%	50%	18%	20%	29%	21%	3%	12%	19%	14%	14%
Fairly Satisfied	273	143	41	37	34	16	3	-	248	4	8	8	5	46	17	22	42
	35%	34%	35%	35%	36%	46%	37%	-%	35%	15%	52%	44%	57%	44%	29%	35%	41%
									b								
Very Satisfied	340	196	42	50	36	14	2	*	313	17	3	5	4	42	27	29	40
	43%	46%	36%	48%	37%	41%	28%	50%	44%	59%	18%	26%	40%	40%	45%	46%	39%
		b															
Don't Know (DO NOT READ OUT)	4	2	-	*	*	*	*	-	4	-	*	-	-	-	*	-	*
	1%	1%	-%	1%	1%	1%	1%	-%	1%	-%	1%	-%	-%	-%	1%	-%	1%
NET: Satisfied	614	339	83	87	70	30	5	*	560	21	11	13	8	88	44	51	82
	78%	80%	71%	83%	73%	86%	66%	50%	79%	74%	70%	70%	97%	84%	74%	80%	80%
		b		b		b											
NET: Dissatisfied	21	5	7	3	5	*	*	-	17	2	-	2	-	5	4	4	5
	3%	1%	6%	3%	6%	1%	4%	-%	2%	6%	-%	9%	-%	5%	6%	6%	5%
			a		a												

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 47 (continuation)

Page 437

Daily delivery (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?)

Base: All respondents who use Royal Mail

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	764	a 374	b 131	c 255	a 694	b 418	c 707	d 330	e 166	f 581	a 312	b 697	c 127	a 561	b 488
Weighted total	783	396	134	249	705	407	724	331	127	596	311	709	107	573	487
Very Dissatisfied	9	3	3	3	9	8	9	6	*	9	9	9	2	9	9
	1%	1%	2%	1%	1%	2%	1%	2%	2%	2%	3%	1%	2%	2%	2%
Fairly Dissatisfied	11	5	6	1	9	7	9	5	3	5	5	9	2	7	8
	1%	1%	4%	1%	1%	2%	1%	2%	2%	1%	1%	1%	2%	1%	2%
			ac												
Neither Satisfied Nor Dissatisfied	144	71	20	51	128	79	130	60	16	107	62	130	17	113	85
	18%	18%	15%	20%	18%	20%	18%	18%	13%	18%	20%	18%	16%	20%	17%
Fairly Satisfied	273	128	54	90	246	153	259	126	53	216	108	252	37	202	177
	35%	32%	40%	36%	35%	38%	36%	38%	41%	36%	35%	36%	35%	35%	36%
Very Satisfied	340	186	51	103	309	158	313	133	55	257	126	304	47	237	208
	43%	47%	38%	41%	44%	39%	43%	40%	43%	43%	41%	43%	44%	41%	43%
Don't Know (DO NOT READ OUT)	4	3	-	1	4	2	4	2	*	2	1	4	1	4	1
	1%	1%	0%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
NET: Satisfied	614	314	105	193	555	311	572	259	107	473	234	557	84	440	384
	78%	79%	78%	78%	79%	77%	79%	78%	84%	79%	75%	79%	79%	77%	79%
									b						
NET: Dissatisfied	21	8	9	4	19	15	19	11	3	15	13	19	4	16	17
	3%	2%	7%	1%	3%	4%	3%	3%	3%	2%	4%	3%	4%	3%	4%
			ac												

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 47 (continuation)

Page 438

Daily delivery (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	764	109	14	646	751	644	754	578	759	-	418	751	174	76	114	573
Weighted total	783	110	14	664	766	650	769	587	777	-	424	771	168	67	120	594
Very Dissatisfied	9	1	-	8	9	9	9	9	9	-	9	9	6	1	2	6
	1%	1%	-%	1%	1%	1%	1%	2%	1%	-%	2%	1%	3% b	2%	1%	1%
Fairly Dissatisfied	11	5	-	6	11	10	11	11	11	-	9	11	2	-	1	10
	1%	4% c	-%	1%	1%	1%	1%	2%	1%	-%	2%	1%	1%	-%	1%	2%
Neither Satisfied Nor Dissatisfied	144	23	2	120	137	120	139	104	139	-	75	144	29	10	24	110
	18%	20%	13%	18%	18%	18%	18%	18%	18%	-%	18%	19%	17%	15%	20%	19%
Fairly Satisfied	273	48	5	222	270	233	272	205	273	-	145	271	59	16	56	201
	35%	44% c	37%	34%	35%	36%	35%	35%	35%	-%	34%	35%	35%	24%	47% ac	34%
Very Satisfied	340	33	7	303	334	276	334	255	340	-	186	331	71	40	37	262
	43%	30%	50%	46% a	44%	43%	43%	43%	44%	-%	44%	43%	42%	59% bc	31%	44% b
Don't Know (DO NOT READ OUT)	4	*	-	3	4	2	4	3	4	-	1	4	1	*	-	4
	1%	1% *	-%	1% *	1% *	1% *	1% *	1% *	1% *	-%	1% *	1% *	1% *	1% *	-%	1% *
NET: Satisfied	614	81	12	525	604	510	606	460	613	-	331	602	130	56	93	463
	78%	74%	87%	79%	79%	78%	79%	78%	79%	-%	78%	78%	78%	83%	78%	78%
NET: Dissatisfied	21	6	-	15	21	19	21	20	21	-	18	21	8	1	3	17
	3%	5%	-%	2%	3%	3%	3%	3%	3%	-%	4%	3%	5%	2%	2%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 47 (continuation)

Page 439

Daily delivery (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?)

Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	764	81	38	634	481	283	701	63	531	49	174	590	146	2
Weighted total	783	88	46	640	485	298	722	61	536	56	181	602	151	1
Very Dissatisfied	9	3	4	2	7	2	9	-	-	4	5	5	2	-
	1%	4%	8%	*%	1%	1%	1%	-%	-%	8%	3%	1%	1%	-%
		c	c							a	b			
Fairly Dissatisfied	11	2	*	9	7	4	9	2	-	8	7	5	4	-
	1%	2%	*%	1%	1%	1%	1%	4%	-%	14%	4%	1%	3%	-%
								a			b			
Neither Satisfied Nor Dissatisfied	144	18	11	113	94	50	136	8	34	21	55	90	23	-
	18%	21%	24%	18%	19%	17%	19%	13%	6%	38%	30%	15%	15%	-%
									a		b			
Fairly Satisfied	273	30	11	232	166	107	253	21	182	15	71	202	56	1
	35%	34%	25%	36%	34%	36%	35%	34%	34%	27%	39%	34%	37%	100%
Very Satisfied	340	35	20	279	209	131	312	28	319	5	40	300	66	-
	43%	40%	43%	44%	43%	44%	43%	46%	60%	8%	22%	50%	44%	-%
								b			a			
Don't Know (DO NOT READ OUT)	4	-	*	4	1	3	2	2	*	3	3	*	*	-
	*%	-%	*%	1%	*%	1%	2%	3%	*%	6%	2%	*%	*%	-%
							a			a	b			
NET: Satisfied	614	64	31	511	376	238	565	49	501	20	111	502	122	1
	78%	73%	67%	80%	77%	80%	78%	80%	94%	35%	62%	83%	81%	100%
									b		a			
NET: Dissatisfied	21	5	4	12	14	7	18	2	-	12	12	9	6	-
	3%	6%	8%	2%	3%	2%	3%	4%	-%	22%	6%	2%	4%	-%
		c	c							a	b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 47 (continuation)

Page 440

Daily delivery (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?)

Base: All respondents who use Royal Mail

	TOTAL	Quarter	
		Q1 2013	Q2 2013
		a	b
Significance Level: 95%			
Unweighted total	764	389	375
Weighted total	783	396	387
Very Dissatisfied	9	3	7
	1%	1%	2%
Fairly Dissatisfied	11	3	8
	1%	1%	2%
Neither Satisfied Nor Dissatisfied	144	87	57
	18%	22%	15%
		b	
Fairly Satisfied	273	143	131
	35%	36%	34%
Very Satisfied	340	159	181
	43%	40%	47%
Don't Know (DO NOT READ OUT)	4	1	3
	0%	0%	1%
NET: Satisfied	614	302	312
	78%	76%	81%
NET: Dissatisfied	21	6	15
	3%	1%	4%
			a
Columns Tested: a,b			

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Table 46 Page 441

Price of postage (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?)
Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Very Dissatisfied

Fairly Dissatisfied

Neither Satisfied Nor
Dissatisfied

Fairly Satisfied

Very Satisfied

Don't Know (DO NOT READ
OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
764	35	48	39	52	55	86	52	62	35	103	105	92	464
783	53	84	63	53	58	116	82	112	37	43	45	37	657
123	14	9	6	9	9	24	9	23	3	5	6	5	106
16%	27%	11%	9%	16%	16%	21%	11%	21%	8%	11%	14%	15%	16%
	cij												
168	9	17	16	17	10	22	13	29	14	8	6	8	147
22%	18%	21%	26%	31%	17%	19%	16%	26%	39%	19%	12%	21%	22%
				k				k	aetgijklm				k
287	20	24	31	17	24	37	34	38	12	20	17	13	237
37%	38%	29%	48%	33%	42%	32%	42%	34%	32%	47%	37%	35%	36%
										bfm			
134	7	25	7	6	9	24	17	11	6	5	9	7	112
17%	14%	29%	11%	12%	15%	20%	20%	10%	18%	12%	21%	20%	17%
		cdhjm											
60	2	8	2	3	6	7	7	9	1	5	6	3	46
8%	3%	10%	3%	5%	11%	6%	9%	8%	4%	11%	13%	8%	7%
											m		
11	*	-	2	1	-	2	2	2	-	1	1	*	9
1%	*%	-%	3%	2%	-%	2%	2%	2%	-%	1%	2%	1%	1%
194	9	33	9	9	15	31	24	20	8	10	15	10	158
25%	17%	39%	14%	17%	26%	27%	29%	18%	22%	23%	34%	28%	24%
		acdghjm									cdhm		
291	24	26	22	25	19	46	22	52	17	13	12	13	253
37%	45%	32%	35%	48%	32%	40%	27%	46%	47%	29%	27%	36%	38%
	k			gjk				gjk	k				k

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Table 48 (continuation)

Page 442

Price of postage (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?)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	764	620	80	22	16	26	144	489	275	699	65	519	131	45	69
Weighted total	783	758	14	4	3	4	24	542	241	750	33	573	124	37	48
Very Dissatisfied	123	119	2	1	1	*	4	82	41	122	*	84	20	7	12
	16%	16%	18%	12%	23%	11%	16%	15%	17%	16%	1%	15%	16%	19%	25%
										b					a
Fairly Dissatisfied	168	163	2	1	*	1	5	125	44	160	9	119	28	7	15
	22%	22%	18%	36%	17%	22%	21%	23%	18%	21%	26%	21%	23%	18%	30%
Neither Satisfied Nor Dissatisfied	287	278	6	1	1	1	10	201	86	273	14	206	51	18	13
	37%	37%	43%	35%	33%	34%	39%	37%	36%	36%	43%	36%	41%	47%	26%
													d	d	
Fairly Satisfied	134	130	2	*	1	1	4	82	52	125	9	105	20	*	7
	17%	17%	18%	8%	20%	18%	17%	15%	21%	17%	26%	18%	17%	1%	15%
									a			c	c		c
Very Satisfied	60	59	*	*	*	*	1	44	16	60	*	48	4	5	2
	8%	8%	2%	8%	8%	12%	5%	8%	7%	8%	1%	8%	4%	14%	4%
													bd		
Don't Know (DO NOT READ OUT)	11	11	*	-	-	*	*	9	2	10	1	11	-	-	*
	1%	1%	1%	-%	-%	4%	1%	2%	1%	1%	2%	2%	-%	-%	-%
NET: Satisfied	194	188	3	1	1	1	5	125	68	184	9	154	25	6	9
	25%	25%	20%	16%	28%	30%	22%	23%	28%	25%	28%	27%	20%	16%	19%
NET: Dissatisfied	291	282	5	2	1	1	9	207	84	282	9	203	48	14	26
	37%	37%	36%	48%	39%	33%	38%	38%	35%	38%	27%	35%	39%	37%	55%
															ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Price of postage (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?)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	*f	*g	a	b	*c	*d	*e	a	b	a	b
Unweighted total	764	369	115	97	103	51	27	2	671	31	23	22	17	107	53	67	93
Weighted total	783	422	117	105	96	35	8	*	711	28	16	19	9	105	60	64	102
Very Dissatisfied	123	63	17	18	19	5	1	*	111	3	1	7	1	16	8	12	12
	16%	15%	14%	17%	20%	13%	17%	50%	16%	9%	7%	37%	10%	15%	13%	19%	12%
Fairly Dissatisfied	168	89	27	26	18	7	1	-	152	5	3	6	2	20	15	11	24
	22%	21%	23%	24%	19%	21%	17%	-%	21%	18%	22%	31%	20%	19%	26%	18%	23%
Neither Satisfied Nor Dissatisfied	287	146	50	33	40	15	3	-	257	15	7	3	5	41	21	24	38
	37%	35%	43%	31%	42%	42%	40%	-%	36%	53%	45%	17%	62%	39%	35%	38%	37%
Fairly Satisfied	134	75	19	23	12	4	1	-	125	2	4	2	*	16	12	10	17
	17%	18%	16%	22%	13%	12%	18%	-%	18%	6%	24%	12%	4%	15%	20%	16%	17%
Very Satisfied	60	38	4	6	7	4	1	-	55	4	-	1	*	11	4	6	9
	8%	9%	4%	6%	7%	11%	8%	-%	8%	14%	-%	3%	4%	11%	7%	9%	9%
Don't Know (DO NOT READ OUT)	11	10	*	-	-	-	-	*	11	-	*	-	-	2	-	-	2
	1%	2%	*%	-%	-%	-%	-%	50%	2%	-%	1%	-%	-%	2%	-%	-%	2%
NET: Satisfied	194	113	23	29	19	8	2	-	181	6	4	3	1	27	16	16	26
	25%	27%	20%	27%	20%	23%	26%	-%	25%	20%	24%	15%	8%	25%	26%	26%	26%
NET: Dissatisfied	291	152	43	44	37	12	3	*	263	8	5	13	3	36	24	23	36
	37%	36%	37%	42%	38%	34%	35%	50%	37%	27%	30%	68%	31%	34%	39%	37%	35%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Page 444

Price of postage (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?)

Base: All respondents who use Royal Mail

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	764	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	783	374	131	255	694	418	707	330	166	581	312	697	127	561	488
Very Dissatisfied	123	396	134	249	705	407	724	331	127	596	311	709	107	573	487
	16%	54	23	44	109	58	115	44	30	90	41	115	10	88	79
		14%	17%	18%	15%	14%	16%	13%	23%	15%	13%	16%	9%	15%	16%
								abcd				c			
Fairly Dissatisfied	168	82	28	57	150	95	155	81	22	133	79	150	30	112	127
	22%	21%	21%	23%	21%	23%	21%	25%	17%	22%	25%	21%	28%	20%	26%
														a	
Neither Satisfied Nor Dissatisfied	287	136	54	97	268	163	274	136	46	227	123	270	34	229	176
	37%	34%	40%	39%	38%	40%	38%	41%	36%	38%	39%	38%	31%	40%	36%
Fairly Satisfied	134	74	26	33	124	68	124	46	23	99	48	118	21	99	77
	17%	19%	19%	13%	18%	17%	17%	14%	18%	17%	15%	17%	19%	17%	16%
Very Satisfied	60	39	4	17	50	23	52	23	6	42	20	52	12	40	26
	8%	10%	3%	7%	7%	6%	7%	7%	5%	7%	6%	7%	12%	7%	5%
		b													
Don't Know (DO NOT READ OUT)	11	10	*	1	5	1	5	*	1	5	*	5	*	4	1
	1%	3%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
		c													
NET: Satisfied	194	113	29	50	174	91	175	69	29	141	68	169	33	140	104
	25%	29%	22%	20%	25%	22%	24%	21%	23%	24%	22%	24%	31%	24%	21%
		c											a		
NET: Dissatisfied	291	136	51	101	259	153	270	125	51	223	120	265	40	200	207
	37%	34%	38%	41%	37%	38%	37%	38%	40%	37%	39%	37%	37%	35%	42%
														a	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Page 445

Price of postage (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?)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	764	109	14	646	751	644	754	578	759	-	418	751	174	76	114	573
Weighted total	783	110	14	664	766	650	769	587	777	-	424	771	168	67	120	594
Very Dissatisfied	123	29	-	93	122	96	122	96	119	-	61	122	22	6	30	86
	16%	27% c	-%	14%	16%	15%	16%	16%	15%	-%	14%	16%	13%	9%	25% ac	14%
Fairly Dissatisfied	168	40	6	126	162	140	165	121	166	-	92	167	36	17	31	120
	22%	36% c	43%	19%	21%	22%	21%	21%	21%	-%	22%	22%	22%	25%	26%	20%
Neither Satisfied Nor Dissatisfied	287	28	5	257	283	250	283	224	287	-	157	284	59	34	42	210
	37%	25%	34%	39% a	37%	39%	37%	38%	37%	-%	37%	37%	35%	50% bc	35%	35%
Fairly Satisfied	134	10	3	121	132	115	132	95	134	-	75	133	29	4	12	117
	17%	9%	23%	18% a	17%	18%	17%	16%	17%	-%	18%	17%	17%	5%	10%	20% ab
Very Satisfied	60	4	-	56	56	42	56	44	60	-	35	56	19	7	3	50
	8%	4%	-%	8%	7%	6%	7%	8%	8%	-%	8%	7%	12%	11% b	3%	8% b
Don't Know (DO NOT READ OUT)	11	*	*	11	11	8	11	7	11	-	4	9	2	-	*	10
	1%	*%	1%	2%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	*%	2%
NET: Satisfied	194	14	3	177	188	156	188	139	194	-	110	189	49	11	16	167
	25%	12%	23%	27% a	25%	24%	24%	24%	25%	-%	26%	25%	29%	16%	13%	28% ab
NET: Dissatisfied	291	69	6	219	284	235	287	217	285	-	153	288	58	23	62	206
	37%	63% c	43%	33%	37%	36%	37%	37%	37%	-%	36%	37%	35%	34%	52% ac	35%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 48 (continuation)

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Price of postage (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?)

Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	764	81	38	634	481	283	701	531	49	174	590	146	2
Weighted total	783	88	46	640	485	298	722	536	56	181	602	151	1
Very Dissatisfied	123	6	9	108	80	42	110	42	29	42	80	20	-
	16%	7%	19%	17%	17%	14%	15%	8%	52%	23%	13%	13%	-%
		a	a					a		b			
Fairly Dissatisfied	168	26	10	132	118	50	161	95	12	56	112	34	-
	22%	29%	23%	21%	24%	17%	22%	18%	21%	31%	19%	23%	-%
				b	b		b			b			
Neither Satisfied Nor Dissatisfied	287	33	14	234	187	100	269	211	12	61	226	57	1
	37%	38%	31%	37%	39%	33%	37%	39%	21%	34%	38%	38%	100%
								b					
Fairly Satisfied	134	16	5	110	73	60	122	121	3	18	116	24	-
	17%	18%	11%	17%	15%	20%	17%	23%	5%	10%	19%	16%	-%
								b		a			
Very Satisfied	60	5	8	47	21	39	49	57	*	4	56	15	-
	8%	6%	17%	7%	4%	13%	7%	11%	1%	2%	9%	10%	-%
			c			a		b		a			
Don't Know (DO NOT READ OUT)	11	2	*	8	5	6	10	11	-	-	11	2	-
	1%	2%	%	1%	1%	2%	1%	2%	-%	-%	2%	1%	-%
NET: Satisfied	194	21	13	157	94	100	171	178	3	22	172	39	-
	25%	24%	28%	25%	19%	34%	24%	33%	6%	12%	29%	26%	-%
						a		b					
NET: Dissatisfied	291	31	19	240	199	92	272	136	40	99	192	54	-
	37%	36%	41%	38%	41%	31%	38%	25%	73%	55%	32%	36%	-%
					b			a		b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Price of postage (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?)

Base: All respondents who use Royal Mail

	TOTAL	Quarter	
		Q1 2013	Q2 2013
		a	b
Significance Level: 95%			
Unweighted total	764	389	375
Weighted total	783	396	387
Very Dissatisfied	123	66	56
	16%	17%	15%
Fairly Dissatisfied	168	90	78
	22%	23%	20%
Neither Satisfied Nor Dissatisfied	287	145	142
	37%	37%	37%
Fairly Satisfied	134	60	74
	17%	15%	19%
Very Satisfied	60	26	34
	8%	7%	9%
Don't Know (DO NOT READ OUT)	11	8	3
	1%	2%	1%
NET: Satisfied	194	86	107
	25%	22%	28%
NET: Dissatisfied	291	156	134
	37%	40%	35%
Columns Tested: a,b			

Table 49
QRM3. SUMMARY. How would you rate the performance of Royal Mail as a recipient and sender in the following areas?
Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Very Dissatisfied

Fairly Dissatisfied

Neither Satisfied Nor
Dissatisfied

Fairly Satisfied

Very Satisfied

Don't Know (DO NOT READ
OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c,d,e,f,g,h,i,j,k

Areas										
Delivery time (when you receive your mail delivery)	Delivery consistency / reliability (e.g. arrives as promised consistently)	Time of collection	Collection reliability	Availability of a daily collection	Latest collection time	Account management (if applicable)	Trustworthiness of the provider	Amount / level of lost mail	Daily delivery	Price of postage
a	b	c	d	e	f	g	h	i	j	k
1566	1566	1566	1566	1566	1566	1566	1566	1566	764	764
1570	1570	1570	1570	1570	1570	1570	1570	1570	783	783
126	61	31	5	16	30	3	26	47	9	123
8%	4%	2%	*%	1%	2%	*%	2%	3%	1%	16%
bcdefghij	cdefghj	deg		dg	deg		dgdefghj		dgabcdefg	hij
230	138	67	14	34	98	2	42	93	11	168
15%	9%	4%	1%	2%	6%	*%	3%	6%	1%	22%
bcdefghij	cdefghj	deg hj	g	dg	cdeg hj		dgcddeg hj		gab cdefg	hij
377	340	175	129	137	216	7	222	261	144	287
24%	22%	11%	8%	9%	14%	*%	14%	17%	18%	37%
cdefghij	cdefghi	deg	g	g	cdeg		cdeg	cdefg	cdefghabc defg	hij
455	582	468	493	467	469	8	594	549	273	134
29%	37%	30%	31%	30%	30%	*%	38%	35%	35%	17%
gk	acdefgk	gk	gk	gk	gk		acdefgkac defg		acefgk	g
369	427	554	614	699	531	28	673	549	340	60
24%	27%	35%	39%	45%	34%	2%	43%	35%	43%	8%
gk	agk	abgk	abcf gik	ab cdfgik	abgk		ab cdfgik	abgkabcdfgik		g
11	20	275	314	216	226	1522	12	71	4	11
1%	1%	18%	20%	14%	14%	97%	1%	5%	*%	1%
	abefhijk		abefhijk	abhijk	abhijk	abcdefhijk		abhjk		
825	1010	1022	1107	1167	1000	35	1267	1098	614	194
53%	64%	65%	71%	74%	64%	2%	81%	70%	78%	25%
gk	agk	agk	abcf gk	ab cdfgik	agk		ab cdfgikabcf gk		ab cdefgl	g
357	200	98	19	50	128	5	68	140	21	291
23%	13%	6%	1%	3%	8%	*%	4%	9%	3%	37%
bcdefghij	cdefghj	deg hj	g	dg	cdeg hj		dgjcddeg hj		dgabc defg	hij

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

No Problems

Amount / level of lost mail

Lost or late delivery of sent mail

Delivery time (when you receive your mail delivery)

Wrong mail delivered / our mail delivered elsewhere

Delivery consistency / reliability (e.g. arrives as promised consistently)

Damaged mail / goods

Wrong postage / shortfall on incoming mail - having to pay

Trustworthiness of the provider

Accessibility of the sorting office / opening hours

Collection reliability

Time of collection

Latest collection time

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1566	a	b	c	d	e	f	g	h	i	j	k	l	m
1570	66	103	76	117	109	198	129	115	85	209	188	171	998
1175	70	120	77	94	86	218	126	156	55	65	57	51	1002
75%	73%	70%	70%	82%	78%	80%	68%	76%	63%	77%	78%	81%	74%
				b c g i	i	g i		i		i	g i	b c g i m	i
162	14	18	18	12	9	22	15	22	15	6	8	2	145
10%	15%	10%	16%	11%	9%	8%	8%	11%	17%	7%	11%	4%	11%
	l	l	f j l	l				l	f g j l		l		l
73	7	14	5	1	3	10	13	9	1	3	4	4	62
5%	8%	8%	5%	1%	2%	4%	7%	4%	2%	3%	5%	6%	5%
	d	d					d				d	d	d
63	5	9	9	*	7	11	4	5	3	5	1	3	54
4%	6%	6%	9%	9%	6%	4%	2%	2%	3%	5%	2%	5%	4%
	d	d	d g h k		d k	d				d k		d	d
49	2	8	*	3	3	6	13	7	3	3	2	*	44
3%	2%	5%	9%	3%	3%	2%	7%	3%	3%	4%	2%	9%	3%
		l					c f k l m	l	l	l			l
45	2	7	2	1	5	7	6	2	7	3	1	2	39
3%	2%	4%	2%	1%	5%	3%	3%	1%	8%	4%	1%	3%	3%
									d h k m				
32	2	5	4	1	1	4	5	6	1	1	*	2	29
2%	2%	3%	3%	1%	1%	1%	3%	3%	1%	1%	1%	2%	2%
17	2	2	-	-	1	-	2	2	4	2	1	*	14
1%	2%	1%	-%	-%	1%	-%	1%	1%	4%	2%	1%	9%	1%
									d f l m	f			
17	-	2	2	1	*	2	4	-	3	1	1	1	14
1%	-%	1%	2%	1%	9%	1%	2%	-%	3%	1%	2%	1%	1%
8	-	*	*	-	-	4	2	-	1	-	*	-	7
9%	-%	9%	9%	-%	-%	1%	1%	-%	1%	-%	1%	-%	1%
6	-	2	*	*	-	-	*	2	-	*	1	*	5
9%	-%	1%	9%	9%	-%	-%	9%	1%	-%	9%	1%	9%	9%
5	-	-	2	-	-	-	2	-	1	-	-	*	5
9%	-%	-%	2%	-%	-%	-%	1%	-%	1%	-%	-%	9%	9%
2	-	-	2	-	-	-	-	-	-	-	*	-	2
9%	-%	-%	2%	-%	-%	-%	-%	-%	-%	-%	1%	-%	9%
			m										

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

Significance Level: 95%
Unweighted total
Weighted total

Availability of a daily
collection

Account management (if
applicable)

Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1566	a 66	b 103	c 76	d 117	e 109	f 198	g 129	h 115	i 85	j 209	k 188	l 171	m 998
1570	95	172	110	114	109	274	185	204	87	84	73	62	1350
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	2	-	-	-	-	-	*	-	-	-	-	-	2
2%	2%	-%	-%	-%	-%	-%	2%	-%	-%	-%	-%	-%	2%
jm													
*	-	-	-	-	*	-	-	-	-	-	-	-	*
2%	-%	-%	-%	-%	2%	-%	-%	-%	-%	-%	-%	-%	2%
52	4	4	4	3	4	6	13	2	6	4	2	1	45
3%	4%	2%	3%	2%	4%	2%	7%	1%	7%	5%	3%	2%	3%
							fhlm		fhl				

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Table 50 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
Weighted total	1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
No Problems	1175	1130	27	7	5	6	45	817	357	1136	39	850	205	70	49
	75%	75%	71%	72%	68%	80%	72%	73%	79% a	75% b	67%	78% cd	73% d	69% d	52%
Amount / level of lost mail	162	157	3	1	1	*	5	126	36	152	10	91	31	19	21
	10%	10%	9%	10%	8%	4%	8%	11% b	8%	10%	17% a	8%	11%	18% ab	22% ab
Lost or late delivery of sent mail	73	69	3	*	1	*	4	54	19	72	1	49	12	2	10
	5%	5%	7%	3%	11%	2%	6%	5%	4%	5%	1%	4%	4%	2%	11% abc
Delivery time (when you receive your mail delivery)	63	58	3	1	1	*	5	44	19	56	7	32	16	11	3
	4%	4%	7% a	11% a	9%	4%	7% a	4%	4%	4%	11% a	3%	6% a	11% ad	3%
Wrong mail delivered / our mail delivered elsewhere	49	47	1	*	*	*	2	38	11	48	1	34	11	1	2
	3%	3%	3%	1%	5%	3%	3%	3%	2%	3%	1%	3%	4%	1%	2%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	44	1	*	1	-	1	27	18	45	*	23	10	5	7
	3%	3%	1%	1%	9% abef	-	2%	2%	4%	3%	1%	2%	4%	5%	7% a
Damaged mail / goods	32	32	-	*	*	*	1	20	12	32	*	26	4	2	*
	2%	2% b	-	5% b	2%	2% b	1%	2%	3%	2%	1%	2%	1%	2%	1%
Wrong postage / shortfall on incoming mail - having to pay	17	16	1	*	*	-	1	13	4	16	1	13	1	1	2
	1%	1%	2%	3%	2%	-	2%	1%	1%	1%	2%	1%	1%	1%	2%
Trustworthiness of the provider	17	15	1	1	-	*	1	12	4	16	*	14	2	*	*
	1%	1%	2%	6% a	-	2%	2% a	1%	1%	1%	1%	1%	1%	1%	1%
Accessibility of the sorting office / opening hours	8	7	*	*	-	-	1	6	2	7	*	6	2	-	*
	1%	1%	1%	1%	-	-	1%	1%	1%	1%	1%	1%	1%	-	1%
Collection reliability	6	5	*	-	*	-	1	3	3	6	-	5	*	*	*
	1%	1%	1%	-	4% a	-	1%	1%	1%	1%	-	1%	1%	1%	1%
Time of collection	5	5	*	-	-	-	*	5	-	5	*	-	1	2	2
	1%	1%	1%	-	-	-	1%	1%	-	1%	1%	-	1%	2% a	2% a
Latest collection time	2	2	-	-	-	-	-	2	-	2	-	*	-	-	2
	1%	1%	-	-	-	-	-	1%	-	1%	-	1%	-	-	2% ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Availability of a daily collection

Account management (if applicable)

Problems with the Smart Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1566	1183	237	55	42	49	383	1072	494	1446	120	992	302	123	149
1570	1507	38	10	7	8	62	1115	455	1511	58	1092	281	102	95
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	2	*	-	-	-	*	*	2	2	*	2	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
*	-	-	-	*	-	*	*	-	*	-	-	-	-	*
-%	-%	-%	-%	abf	3%	-%	-%	-%	-%	-%	-%	-%	-%	-%
52	51	1	*	*	1	2	46	7	52	*	27	15	5	6
3%	3%	2%	3%	2%	6%	3%	b	1%	3%	-%	2%	a	5%	7%
														a

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Table 50 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?**Base: All respondents who use Royal Mail**

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
No Problems	1175	560	218	178	147	49	16	7	1070	46	25	21	12	179	76	116	139
	75%	80%	71%	76%	69%	62%	57%	72%	77%	63%	65%	51%	40%	65%	65%	65%	66%
		bdef	f	ef					bcd	e	e						
Amount / level of lost mail	162	55	28	32	32	10	4	1	130	9	7	8	8	43	13	27	28
	10%	8%	9%	14%	15%	13%	14%	6%	9%	12%	18%	20%	27%	16%	11%	15%	13%
				a	ab							a	ab				
Lost or late delivery of sent mail	73	19	21	11	12	6	3	*	57	5	1	2	7	18	7	7	18
	5%	3%	7%	5%	6%	8%	11%	3%	4%	7%	3%	5%	25%	6%	6%	4%	8%
			a		a	a	ac						abcd				
Delivery time (when you receive your mail delivery)	63	17	14	12	13	5	2	1	51	4	2	5	*	15	12	11	16
	4%	2%	4%	5%	6%	6%	6%	6%	4%	6%	5%	13%	1%	6%	10%	6%	8%
				a	a	a						ae					
Wrong mail delivered / our mail delivered elsewhere	49	22	8	6	8	4	*	*	45	2	*	2	*	12	6	10	8
	3%	3%	3%	2%	4%	5%	1%	1%	3%	2%	%	5%	1%	4%	5%	6%	4%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	14	10	5	10	1	1	2	33	4	2	5	*	13	5	10	8
	3%	2%	3%	2%	5%	2%	5%	22%	2%	5%	6%	13%	2%	5%	4%	5%	4%
				a								ae					
Damaged mail / goods	32	15	8	3	4	2	*	-	32	-	*	-	1	5	3	6	1
	2%	2%	3%	1%	2%	3%	1%	-%	2%	-%	1%	-%	2%	2%	2%	4%	1%
																b	
Wrong postage / shortfall on incoming mail - having to pay	17	4	11	-	1	*	1	-	13	*	2	2	-	1	5	1	5
	1%	1%	4%	-%	%	%	2%	-%	1%	%	5%	5%	-%	%	4%	%	2%
			acd				c				a	a			a		
Trustworthiness of the provider	17	9	4	2	2	*	-	*	14	2	*	-	-	2	*	1	1
	1%	1%	1%	1%	1%	%	-%	1%	1%	2%	1%	-%	-%	1%	%	1%	%
Accessibility of the sorting office / opening hours	8	4	-	2	1	*	*	-	7	-	*	-	*	4	-	3	*
	%	1%	-%	1%	1%	%	1%	-%	1%	-%	%	-%	2%	1%	-%	2%	%
Collection reliability	6	3	2	-	*	*	*	*	5	1	-	*	*	1	2	*	3
	%	%	1%	-%	%	%	2%	1%	%	1%	-%	%	%	%	2%	%	1%
Time of collection	5	2	-	1	2	*	-	-	5	-	-	-	-	-	2	-	2
	%	%	-%	1%	1%	%	-%	-%	%	-%	-%	-%	-%	-%	2%	-%	1%
															a		
Latest collection time	2	-	-	-	*	-	-	2	-	2	-	-	-	-	-	-	-

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Produced by OLR

OFC1885

Issue date: 03/07/13

a

*% -% -% -% *% -% -% 18% -% 3% -% -% -% -% -% -%

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Table 50 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1566	602	297	217	242	118	77	13	1336	90	51	49	40	291	109	197	204
Weighted total	1570	701	305	234	213	78	28	10	1387	74	39	41	29	274	117	179	211
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Account management (if applicable)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	2	-	*	2	-	-	-	-	2	-	-	-	-	-	-	-	-
*%	*%	-%	*%	1%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	*	-	-	-	-	-	*	-	-	-	-	*	-	*	-	-	*
*%	*%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	*%	-%	*%	-%	-%	*%
Other	52	19	11	1	14	2	4	2	41	5	2	*	4	9	8	9	8
3%	3%	3%	4%	*%	7%	3%	14%	20%	3%	7%	6%	1%	13%	3%	7%	5%	4%
		c	c		ac	c	abcde			a		a	ad				

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 50 (continuation)

Page 455

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	1566	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1570	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
No Problems	1175	792	274	492	1455	890	1478	704	375	1245	653	1455	230	1193	1076
	75%	623	188	353	1091	647	1108	490	267	922	455	1087	161	892	783
		79%	69%	72%	75%	73%	75%	70%	71%	74%	70%	75%	70%	75%	73%
		bc			d		d			d		a			
Amount / level of lost mail	162	61	40	62	153	108	156	100	55	138	93	158	37	129	118
	10%	8%	14%	13%	11%	12%	11%	14%	15%	11%	14%	11%	16%	11%	11%
			a	a			acf		acf		b	b			
Lost or late delivery of sent mail	73	22	20	31	66	50	67	43	24	58	42	69	11	57	61
	5%	3%	7%	6%	5%	6%	5%	6%	6%	5%	6%	5%	5%	5%	6%
			a	a											
Delivery time (when you receive your mail delivery)	63	26	17	19	57	38	59	41	22	54	32	56	8	46	44
	4%	3%	6%	4%	4%	4%	4%	6%	6%	4%	5%	4%	3%	4%	4%
			a												
Wrong mail delivered / our mail delivered elsewhere	49	28	4	17	43	25	43	19	12	35	17	43	4	36	32
	3%	4%	2%	3%	3%	3%	3%	3%	3%	3%	3%	3%	2%	3%	3%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	20	10	14	42	25	42	23	12	38	24	40	5	30	29
	3%	2%	4%	3%	3%	3%	3%	3%	3%	3%	4%	3%	2%	3%	3%
Damaged mail / goods	32	15	3	14	32	21	32	9	8	28	8	32	5	30	28
	2%	2%	1%	3%	2%	2%	2%	1%	2%	2%	1%	2%	2%	2%	3%
Wrong postage / shortfall on incoming mail - having to pay	17	9	2	6	16	13	16	9	4	12	9	15	5	13	13
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%
Trustworthiness of the provider	17	10	6	1	14	4	14	7	4	11	7	17	1	11	16
	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
		c	c												
Accessibility of the sorting office / opening hours	8	4	2	2	8	4	8	4	1	7	4	8	2	8	8
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Collection reliability	6	3	3	*	6	3	6	3	1	6	3	4	1	4	4
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
			c	1%											
Time of collection	5	2	3	*	5	5	5	2	2	3	2	5	-	5	5
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
			c	1%											
Latest collection time	2	*	-	2	2	2	2	2	2	2	2	2	-	*	2
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b															

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Table 50 (continuation)

Page 456

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Availability of a daily collection

Account management (if applicable)

Problems with the Smart Stamp online system

Don't know / na

Other

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
1566	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	757	291	509	1459	941	1479	744	444	1238	684	1460	292	1208	1107
Weighted total	1570	792	274	1455	890	1478	704	375	1245	653	1455	230	1193	1076
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Account management (if applicable)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	2	2	-	2	2	2	-	2	2	-	2	-	2	2
	*%	f%	-%	*%	*%	*%	-%	*%	*%	-%	*%	-%	*%	*%
	a													
Don't know / na	*	-	-	*	*	*	*	-	-	*	*	-	*	*
	*%	-%	-%	*%	*%	*%	*%	-%	-%	*%	*%	-%	*%	*%
Other	52	28	10	48	32	50	28	18	40	25	48	11	39	43
	3%	3%	4%	3%	4%	3%	4%	5%	3%	4%	3%	5%	3%	4%

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	1566	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
Weighted total	1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
No Problems	1175	175	25	984	1143	968	1147	842	1167	2	622	1146	249	90	152	930
	75%	67%	71%	76% a	75%	74%	75%	72%	75%	100%	71%	75% a	71%	62%	65%	78% ab
Amount / level of lost mail	162	39	5	117	158	141	158	138	158	-	112	160	45	24	30	109
	10%	15% c	15%	9%	10%	11%	10%	12%	10%	-%	13%	10%	13%	16% c	13%	9%
Lost or late delivery of sent mail	73	16	3	56	71	66	73	67	73	-	49	73	20	17	10	45
	5%	6%	8%	4%	5%	5%	5%	6%	5%	-%	6%	5%	6%	12% bc	4%	4%
Delivery time (when you receive your mail delivery)	63	22	-	41	61	52	61	52	63	-	34	61	10	3	24	36
	4%	8% c	-%	3%	4%	4%	4%	4%	4%	-%	4%	4%	3%	2%	10% ac	3%
Wrong mail delivered / our mail delivered elsewhere	49	6	*	42	49	42	49	38	49	-	25	49	11	5	6	38
	3%	2%	1%	3%	3%	3%	3%	3%	3%	-%	3%	3%	3%	3%	3%	3%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	4	-	41	45	42	45	38	45	-	27	45	16	3	12	31
	3%	2%	-%	3%	3%	3%	3%	3%	3%	-%	3%	3%	5%	2%	5% c	3%
Damaged mail / goods	32	12	*	20	32	31	32	32	32	-	23	32	3	*	6	27
	2%	5% c	1%	2%	2%	2%	2%	3%	2%	-%	3% c	2%	1%	*%	2%	2%
Wrong postage / shortfall on incoming mail - having to pay	17	3	-	14	17	12	17	14	17	-	11	17	5	*	4	13
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	*%	2%	1%
Trustworthiness of the provider	17	2	-	14	15	13	15	13	17	-	12	15	3	2	1	13
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	2%	*%	1%
Accessibility of the sorting office / opening hours	8	-	-	8	8	8	8	8	8	-	6	8	2	-	6	2
	*%	-%	-%	1%	1%	1%	1%	1%	*%	-%	1%	1%	1%	-%	2% c	*%
Collection reliability	6	2	-	4	4	4	4	3	6	-	3	4	*	*	2	3
	*%	1%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	*%	1%	*%
Time of collection	5	3	-	2	5	5	5	5	5	-	3	5	*	*	4	1
	*%	1% c	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	*%	2% c	*%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Page 458

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Latest collection time

Availability of a daily collection

Account management (if applicable)

Problems with the Smart Stamp online system

Don't know / na

Other

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1566	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
276	276	35	1269	1533	1345	1539	1197	1558	1	903	1534	399	154	238	1172
1570	261	36	1287	1526	1315	1532	1173	1558	2	875	1533	351	145	235	1188
2	-	-	2	2	2	2	2	2	-	2	2	-	-	-	2
%	-%	-%	%	%	%	%	%	%	-%	%	%	-%	-%	-%	%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	2	2	*	2	2	2	2	2	-	2	2	-	-	-	2
%	1%	5%	%	%	%	%	%	%	-%	%	%	-%	-%	-%	%
c		ac													
*	-	-	*	*	*	*	*	*	-	*	*	-	-	-	*
%	-%	-%	%	%	%	%	%	%	-%	%	%	-%	-%	-%	%
52	10	1	43	52	50	52	39	52	-	38	52	15	10	7	36
3%	4%	4%	3%	3%	4%	3%	3%	3%	-%	4%	3%	4%	7%	3%	3%
													c		

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Table 50 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
No Problems	1175	109	64	991	780	394	1089	85	871	43	-	1175	230	2
	75%	58%	62%	78% ab	73%	78% a	74%	83% a	84% b	35%	-%	100% a	66%	30%
Amount / level of lost mail	162	29	16	117	121	41	155	7	58	34	162	-	51	2
	10%	16% c	15%	9%	11%	8%	11%	7%	6%	28% a	41% b	-%	15%	31%
Lost or late delivery of sent mail	73	13	9	51	51	22	68	5	28	18	73	-	21	-
	5%	7%	9% c	4%	5%	4%	5%	5%	3%	15% a	18% b	-%	6%	-%
Delivery time (when you receive your mail delivery)	63	16	1	46	57	6	62	1	14	22	63	-	24	2
	4%	8% bc	1% 1%	4%	5% b	1% 1%	4%	1% 1%	1% 1%	18% a	16% b	-%	7%	27%
Wrong mail delivered / our mail delivered elsewhere	49	12	1	35	36	13	46	3	21	10	49	-	18	-
	3%	7% bc	1% 1%	3%	3%	3%	3%	3%	2%	8% a	12% b	-%	5%	-%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	9	5	31	35	10	44	1	18	15	45	-	16	-
	3%	5% 5%	5% 2%	2%	3% 3%	2% 2%	3% 3%	1% 1%	2% 2%	12% a	11% b	-%	4%	-%
Damaged mail / goods	32	8	4	21	21	11	31	2	20	7	32	-	4	4
	2%	4% c	3% 2%	2%	2% 2%	2% 2%	2% 2%	2% 2%	2% 2%	6% a	8% b	-%	1%	59%
Wrong postage / shortfall on incoming mail - having to pay	17	3	2	12	10	7	17	-	12	3	17	-	5	*
	1%	2% 2%	2% 1%	1%	1% 1%	1% 1%	1% 1%	-% -%	1% 1%	2% 2%	4% b	-%	1%	7%
Trustworthiness of the provider	17	4	2	11	10	6	15	2	5	3	17	-	2	-
	1%	2% 2%	2% 1%	1% 1%	1% 1%	1% 1%	1% 1%	2% 2%	1% 1%	3% a	4% b	-%	1% 1%	-% -%
Accessibility of the sorting office / opening hours	8	2	*	6	6	1	8	-	*	7	8	-	2	-
	*%	1% 1%	*% 1%	*% 1%	1% 1%	*% 1%	1% 1%	-% -%	*% 1%	5% a	2% b	-% -%	*% 1%	-% -%
Collection reliability	6	-	1	5	4	2	5	*	3	*	6	-	3	-
	*%	-% 1%	1% 1%	*% 1%	*% 1%	*% 1%	*% 1%	*% 1%	*% 1%	*% 1%	1% b	-% -%	1% 1%	-% -%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Page 460

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1566	171	100	1278	1072	494	1465	101	1062	120	389	1177	356	8
Weighted total	1570	187	103	1269	1067	503	1468	102	1038	123	395	1175	348	7
Time of collection	5	-	-	5	4	1	5	-	1	2	5	-	2	-
	%	-%	-%	%	%	%	%	-%	%	1% a	1%	-%	1%	-%
Latest collection time	2	-	-	2	*	2	2	-	2	-	2	-	-	-
	%	-%	-%	%	%	%	%	-%	%	-%	1% b	-%	-%	-%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Account management (if applicable)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	2	-	2	*	2	-	2	-	2	-	2	-	-	-
	%	-%	2% c	%	%	-%	%	-%	%	-%	% b	-%	-%	-%
Don't know / na	*	*	-	-	*	-	*	-	-	*	-	*	-	-
	%	%	-%	-%	%	-%	%	-%	-%	%	-%	%	-%	-%
Other	52	8	4	40	33	20	47	5	23	11	52	-	14	*
	3%	4%	4%	3%	3%	4%	3%	5%	2%	9% a	13% b	-%	4%	7%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1566	398	404	389	375
Weighted total	1570	387	400	396	387
No Problems	1175	290	283	310	292
	75%	75%	71%	78%	75%
			b		
Amount / level of lost mail	162	48	57	26	31
	10%	12%	14%	7%	8%
		c	cd		
Lost or late delivery of sent mail	73	8	25	21	20
	5%	2%	6%	5%	5%
			a	a	a
Delivery time (when you receive your mail delivery)	63	20	16	20	6
	4%	5%	4%	5%	2%
		d	d	d	
Wrong mail delivered / our mail delivered elsewhere	49	8	13	13	15
	3%	2%	3%	3%	4%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	11	4	17	13
	3%	3%	1%	4%	3%
			b	b	
Damaged mail / goods	32	4	9	9	10
	2%	1%	2%	2%	3%
Wrong postage / shortfall on incoming mail - having to pay	17	6	2	4	6
	1%	2%	1%	1%	1%
Trustworthiness of the provider	17	9	2	3	2
	1%	2%	1%	1%	1%
		b			
Accessibility of the sorting office / opening hours	8	5	3	-	-
	*%	1%	1%	-%	-%
		cd			
Collection reliability	6	1	2	2	*
	*%	*%	1%	1%	*%
Time of collection	5	*	5	-	-
	*%	*%	1%	-%	-%
			acd		
Latest collection time	2	2	-	-	-
	*%	1%	-%	-%	-%

Columns Tested: a,b,c,d

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Availability of a daily

collection

Account management (if
applicable)

Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1566	398	404	389	375
1570	387	400	396	387
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
2	-	2	-	-
*%	-%	*%	-%	-%
+	-	-	+	-
*%	-%	-%	*%	-%
52	16	10	8	18
3%	4%	3%	2%	5%
				c

Table 51
QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail. Excluding those with no problems

Significance Level: 95%
Unweighted total
Weighted total

Amount / level of lost
mail

Lost or late delivery of
sent mail

Delivery time (when you
receive your mail
delivery)

Wrong mail delivered /
our mail delivered
elsewhere

Delivery consistency /
reliability (e.g.
arrives as promised
consistently)

Damaged mail / goods

Wrong postage /
shortfall on incoming
mail - having to pay

Trustworthiness of the
provider

Accessibility of the
sorting office / opening
hours

Collection reliability

Time of collection

Latest collection time

Availability of a daily
collection

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
390	*a	b	*c	*d	*e	f	g	*h	i	j	k	l	m
15	15	31	24	25	25	42	44	27	30	47	45	35	263
395	25	51	33	20	24	55	59	48	32	19	16	12	349
162	14	18	18	12	9	22	15	22	15	6	8	2	145
41%	57%	35%	54%	60%	40%	40%	25%	45%	45% l	32%	52% gl	19%	42% gl
73	7	14	5	1	3	10	13	9	1	3	4	4	62
18%	28%	27% i	16%	4%	11%	18%	21% i	18%	5%	15%	24% i	34% ijm	18%
63	5	9	9	*	7	11	4	5	3	5	1	3	54
16%	21%	18%	28%	2%	28%	20%	7%	9%	9%	24% gk	8%	25% gk	15%
49	2	8	*	3	3	6	13	7	3	3	2	*	44
12%	7%	17% l	1%	15%	12%	10%	21% l	14%	8%	18% l	11%	1%	13% l
45	2	7	2	1	5	7	6	2	7	3	1	2	39
11%	7%	13%	5%	6%	23%	13%	9%	4%	21%	17%	7%	18%	11%
32	2	5	4	1	1	4	5	6	1	1	*	2	29
8%	7%	9%	11%	6%	6%	6%	9%	13%	4%	6%	3%	13%	8%
17	2	2	-	-	1	-	2	2	4	2	1	*	14
4%	7%	5%	-%	-%	6%	-%	3%	5%	12% f	11% f	7%	1%	4%
17	-	2	2	1	*	2	4	-	3	1	1	1	14
4%	-%	5%	5%	7%	1%	3%	6%	-%	9%	3%	8%	5%	4%
8	-	*	*	-	-	4	2	-	1	-	*	-	7
2%	-%	1%	*%	-%	-%	6%	3%	-%	4%	-%	3%	-%	2%
6	-	2	*	*	-	-	*	2	-	*	1	*	5
1%	-%	4%	*%	1%	-%	-%	*%	4%	-%	1%	6% m	1%	1%
5	-	-	2	-	-	-	2	-	1	-	-	*	5
1%	-%	-%	5%	-%	-%	-%	3%	-%	4%	-%	-%	1%	1%
2	-	-	2	-	-	-	-	-	-	-	*	-	2
1%	-%	-%	5%	-%	-%	-%	-%	-%	-%	-%	3%	-%	1%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

Significance Level: 95%

Unweighted total

Weighted total

Account management (if applicable)

No Problems

Problems with the Smart Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	*a	b	*c	*d	*e	f	g	*h	i	j	k	l	m
390	15	31	24	25	25	42	44	27	30	47	45	35	263
395	25	51	33	20	24	55	59	48	32	19	16	12	349
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	2	-	-	-	-	-	*	-	-	-	-	-	2
*%	7%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	1%
*	-	-	-	-	*	-	-	-	-	-	-	-	*
*%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	*%
52	4	4	4	3	4	6	13	2	6	4	2	1	45
13%	14%	8%	11%	13%	17%	10%	22%	4%	20%	21%	13%	10%	13%

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Table 51 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail. Excluding those with no problems

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	390	282	67	16	14	11	108	289	101	355	35	207	77	41	65
Weighted total	395	377	11	3	2	2	18	298	97	376	19	242	75	32	46
Amount / level of lost mail	162 41%	157 42% f	3 30%	1 35%	1 25%	* 21%	5 29%	126 42%	36 37%	152 40%	10 50%	91 38%	31 41%	19 58% a	21 45%
Lost or late delivery of sent mail	73 18%	69 18%	3 23%	* 11%	1 34%	* 9%	4 22%	54 18%	19 19%	72 19% b	1 4%	49 20% c	12 16%	2 6%	10 23% c
Delivery time (when you receive your mail delivery)	63 16%	58 15%	3 23%	1 37%	1 27%	* 18%	5 26% a	44 15%	19 19%	56 15%	7 34% a	32 13%	16 22% d	11 35% ad	3 7%
Wrong mail delivered / our mail delivered elsewhere	49 12%	47 12%	1 9%	* 4%	* 16%	* 16%	2 10%	38 13%	11 11%	48 13%	1 3%	34 14%	11 14%	1 4%	2 5%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45 11%	44 12%	1 5%	* 5%	1 27%	- -%	1 7%	27 9%	18 19% a	45 12% b	* 1%	23 10%	10 13%	5 15%	7 14%
Damaged mail / goods	32 8%	32 8% b	- -%	* 16%	* 5%	* 12%	1 4%	20 7%	12 13%	32 9%	* 1%	26 11% d	4 5%	2 7%	* 1%
Wrong postage / shortfall on incoming mail - having to pay	17 4%	16 4%	1 8%	* 12%	* 5%	- -%	1 7%	13 4%	4 5%	16 4%	1 7%	13 5%	1 2%	1 2%	2 5%
Trustworthiness of the provider	17 4%	15 4%	1 7%	1 20%	- -%	* 9%	1 8%	12 4%	4 4%	16 4%	* 2%	14 6%	2 2%	* 1%	* *%
Accessibility of the sorting office / opening hours	8 2%	7 2%	* 4%	* 5%	- -%	- -%	1 3%	6 2%	2 2%	7 2%	* 2%	6 2%	2 2%	- -%	* 1%
Collection reliability	6 1%	5 1%	* 4%	- -%	* 13%	- -%	1 4%	3 1%	3 3%	6 2%	- -%	5 2%	* 1%	* *%	* 1%
Time of collection	5 1%	5 1%	* 1%	- -%	- -%	- -%	* 1%	5 2%	- -%	5 1%	* 1%	- -%	1 2%	2 6% a	2 4% a
Latest collection time	2 1%	2 1%	- -%	- -%	- -%	- -%	- -%	2 1%	- -%	2 1%	- -%	* *%	- -%	- -%	2 4% a
Availability of a daily collection	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

Significance Level: 95%

Unweighted total

Weighted total

Account management (if applicable)

No Problems

Problems with the Smart

Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
390	282	67	16	14	11	108	289	101	355	35	207	77	41	65
395	377	11	3	2	2	18	298	97	376	19	242	75	32	46
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	2	*	-	-	-	*	*	2	2	*	2	-	-	-
*%	*%	1%	-%	-%	-%	1%	*%	2% a	*%	1%	1%	-%	-%	-%
*	-	-	-	*	-	*	*	-	*	-	-	-	-	*
*%	-%	-%	-%	8%	-%	1%	*%	-%	*%	-%	-%	-%	-%	*%
52	51	1	*	*	1	2	46	7	52	*	27	15	5	6
13%	13%	8%	9%	5%	32%	10%	15% b	7%	14% b	1%	11%	20%	14%	14%

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Table 51 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?**Base: All respondents who use Royal Mail. Excluding those with no problems**

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	390	118	77	46	69	37	36	7	303	25	22	19	21	102	37	70	69
Weighted total	395	141	87	56	67	29	12	3	316	28	14	20	18	95	41	63	72
Amount / level of lost mail	162 41%	55 39%	28 32%	32 56% b	32 48%	10 34%	4 34%	1 20%	130 41%	9 31%	7 50%	8 42%	8 46%	43 45%	13 31%	27 43%	28 39%
Lost or late delivery of sent mail	73 18%	19 14%	21 25%	11 19%	12 18%	6 22%	3 26%	* 12%	57 18%	5 19%	1 9%	2 11%	7 41%	18 19%	7 16%	7 11%	18 24% a
Delivery time (when you receive your mail delivery)	63 16%	17 12%	14 16%	12 22%	13 19%	5 16%	2 13%	1 21%	51 16%	4 16%	2 14%	5 27%	* 2%	15 16%	12 29%	11 17%	16 23%
Wrong mail delivered / our mail delivered elsewhere	49 12%	22 16% f	8 9%	6 10%	8 12%	4 13%	* 2%	* 5%	45 14%	2 6%	* 1%	2 10%	* 2%	12 13%	6 14%	10 16%	8 11%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45 11%	14 10%	10 12%	5 10%	10 15%	1 4%	1 11%	2 79%	33 10%	4 14%	2 17%	5 27%	* 3%	13 14%	5 12%	10 15%	8 12%
Damaged mail / goods	32 8%	15 11%	8 9%	3 5%	4 6%	2 7%	* 2%	- -	32 10%	- -	* 2%	- -	1 3%	5 5%	3 6%	6 10% b	1 1%
Wrong postage / shortfall on incoming mail - having to pay	17 4%	4 3%	11 13% acde	- -	1 1%	* 1%	1 5%	- -	13 4%	* 1%	2 13%	2 11%	- -	1 1%	5 12% a	1 1%	5 7%
Trustworthiness of the provider	17 4%	9 6%	4 5%	2 3%	2 3%	* *	- -	* 4%	14 5%	2 6%	* 2%	- -	- -	2 2%	* *	1 2%	1 1%
Accessibility of the sorting office / opening hours	8 2%	4 3%	- -	2 4%	1 2%	* 1%	* 1%	- -	7 2%	- -	* 1%	- -	* 3%	4 4%	- -	3 5%	* *
Collection reliability	6 1%	3 2%	2 2%	- -	* 1%	* *	* 4%	* 4%	5 2%	1 2%	- -	* 1%	* 1%	1 1%	2 5%	* *	3 4%
Time of collection	5 1%	2 1%	- -	1 2%	2 3%	* *	- -	- -	5 2%	- -	- -	- -	- -	- -	2 4% a	- -	2 2%
Latest collection time	2 1%	- -	- -	- -	* 1%	- -	- -	2 66%	- -	2 8%	- -	- -	- -	- -	- -	- -	- -
Availability of a daily collection	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	390	118	77	46	69	37	36	7	303	25	22	19	21	102	37	70	69
Weighted total	395	141	87	56	67	29	12	3	316	28	14	20	18	95	41	63	72
Account management (if applicable)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	2	-	*	2	-	-	-	-	2	-	-	-	-	-	-	-	-
	*%	-%	*%	3%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	*	-	-	-	-	-	*	-	-	-	-	*	-	*	-	-	*
	*%	-%	-%	-%	-%	-%	2%	-%	-%	-%	-%	1%	-%	*%	-%	-%	*%
Other	52	19	11	1	14	2	4	2	41	5	2	*	4	9	8	9	8
	13%	13%	12%	1%	22%	7%	33%	70%	13%	18%	17%	1%	22%	10%	20%	15%	11%
		c	c		c		abce										

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 51 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	390	150	94	145	366	256	372	222	133	318	208	369	91	304	303
Weighted total	395	169	86	139	364	243	370	214	108	324	199	368	69	301	293
Amount / level of lost mail	162	61	40	62	153	108	156	100	55	138	93	158	37	129	118
	41%	36%	46%	44%	42%	44%	42%	47%	51%	43%	47%	43%	54%	43%	40%
Lost or late delivery of sent mail	73	22	20	31	66	50	67	43	24	58	42	69	11	57	61
	18%	13%	23% a	22% a	18%	21%	18%	20%	22%	18%	21%	19%	16%	19%	21%
Delivery time (when you receive your mail delivery)	63	26	17	19	57	38	59	41	22	54	32	56	8	46	44
	16%	15%	20%	14%	16%	16%	16%	19%	20%	17%	16%	15%	12%	15%	15%
Wrong mail delivered / our mail delivered elsewhere	49	28	4	17	43	25	43	19	12	35	17	43	4	36	32
	12%	16% b	5%	12%	12%	10%	12%	9%	11%	11%	9%	12%	6%	12%	11%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	20	10	14	42	25	42	23	12	38	24	40	5	30	29
	11%	12%	12%	10%	11%	10%	11%	11%	11%	12%	12%	11%	8%	10%	10%
Damaged mail / goods	32	15	3	14	32	21	32	9	8	28	8	32	5	30	28
	8%	9%	4%	10%	9% d	9%	9% d	4%	7%	9% d	4%	9% a	7%	10%	10%
Wrong postage / shortfall on incoming mail - having to pay	17	9	2	6	16	13	16	9	4	12	9	15	5	13	13
	4%	5%	3%	4%	4%	5%	4%	4%	4%	4%	5%	4%	8%	4%	4%
Trustworthiness of the provider	17	10	6	1	14	4	14	7	4	11	7	17	1	11	16
	4%	6% c	7% c	1% c	4%	2%	4%	3%	3%	3%	3%	5%	1%	4%	5%
Accessibility of the sorting office / opening hours	8	4	2	2	8	4	8	4	1	7	4	8	2	8	8
	2%	2%	2%	2%	2%	2%	2%	2%	1%	2%	2%	2%	3%	3%	3%
Collection reliability	6	3	3	*	6	3	6	3	1	6	3	4	1	4	4
	1%	2%	4% c	*% c	2%	1%	2%	1%	1%	2%	2%	1%	1%	1%	1%
Time of collection	5	2	3	*	5	5	5	2	2	3	2	5	-	5	5
	1%	1%	4% c	*% c	1%	2%	1%	1%	2%	1%	1%	1%	-	2%	2%
Latest collection time	2	*	-	2	2	2	2	2	2	2	2	2	-	*	2
	1%	*%	-%	1%	1%	1%	1%	1%	2%	1%	1%	1%	-%	*%	1%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

Significance Level: 95%

Unweighted total

Weighted total

Account management (if applicable)

No Problems

Problems with the Smart Stamp online system

Don't know / na

Other

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
390	150	94	145	366	256	372	222	133	318	208	369	91	304	303
395	169	86	139	364	243	370	214	108	324	199	368	69	301	293
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	-	2	-	2	2	2	-	2	2	-	2	-	2	2
*%	-%	2%	-%	1%	1%	1%	-%	2%	1%	-%	1%	-%	1%	1%
*	-	-	*	*	*	*	*	-	-	*	*	-	*	*
*%	-%	-%	*%	*%	*%	*%	*%	-%	-%	*%	*%	-%	*%	*%
52	28	10	15	48	32	50	28	18	40	25	48	11	39	43
13%	16%	11%	11%	13%	13%	13%	13%	16%	12%	13%	13%	16%	13%	15%

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Table 51 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?**Base: All respondents who use Royal Mail. Excluding those with no problems**

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	390	95	10	288	383	353	385	324	388	-	260	385	119	55	80	255
Weighted total	395	85	10	303	383	348	385	331	391	-	253	387	101	54	83	258
Amount / level of lost mail	162	39	5	117	158	141	158	138	158	-	112	160	45	24	30	109
	41%	46%	50%	39%	41%	41%	41%	42%	40%	-%	44%	41%	45%	43%	36%	42%
Lost or late delivery of sent mail	73	16	3	56	71	66	73	67	73	-	49	73	20	17	10	45
	18%	19%	26%	18%	19%	19%	19%	20%	19%	-%	19%	19%	20%	32% bc	12%	18%
Delivery time (when you receive your mail delivery)	63	22	-	41	61	52	61	52	63	-	34	61	10	3	24	36
	16%	26% c	-%	13%	16%	15%	16%	16%	16%	-%	14%	16%	10%	6%	28% ac	14%
Wrong mail delivered / our mail delivered elsewhere	49	6	*	42	49	42	49	38	49	-	25	49	11	5	6	38
	12%	8%	2%	14%	13%	12%	13%	12%	12%	-%	10%	13%	11%	8%	8%	15%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	4	-	41	45	42	45	38	45	-	27	45	16	3	12	31
	11%	5%	-%	14% a	12%	12%	12%	12%	12%	-%	11%	12%	16%	5%	14%	12%
Damaged mail / goods	32	12	*	20	32	31	32	32	32	-	23	32	3	*	6	27
	8%	14% c	5%	7%	8%	9%	8%	10%	8%	-%	9% c	8%	3%	%	7%	10% a
Wrong postage / shortfall on incoming mail - having to pay	17	3	-	14	17	12	17	14	17	-	11	17	5	*	4	13
	4%	4%	-%	5%	4%	3%	4%	4%	4%	-%	4%	4%	4%	1%	5%	5%
Trustworthiness of the provider	17	2	-	14	15	13	15	13	17	-	12	15	3	2	1	13
	4%	2%	-%	5%	4%	4%	4%	4%	4%	-%	5%	4%	3%	4%	1%	5%
Accessibility of the sorting office / opening hours	8	-	-	8	8	8	8	8	8	-	6	8	2	-	6	2
	2%	-%	-%	3%	2%	2%	2%	2%	2%	-%	2%	2%	2%	-%	7% ac	1%
Collection reliability	6	2	-	4	4	4	4	3	6	-	3	4	*	*	2	3
	1%	3%	-%	1%	1%	1%	1%	1%	2%	-%	1%	1%	%	1%	3%	1%
Time of collection	5	3	-	2	5	5	5	5	5	-	3	5	*	*	4	1
	1%	4% c	-%	1%	1%	1%	1%	2%	1%	-%	1%	1%	%	%	4% c	1%
Latest collection time	2	-	-	2	2	2	2	2	2	-	2	2	-	-	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	95	10	288	383	353	385	324	388	-	260	385	119	55	80	255
Weighted total	390	85	10	383	348	385	331	391	-	253	387	101	54	83	258
Account management (if applicable)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	2	2	*	2	2	2	2	2	-	2	2	-	-	-	2
	*%	2%	17%	1%	1%	1%	1%	*%	-%	1%	*%	-%	-%	-%	1%
	c														
Don't know / na	*	-	*	*	*	*	*	*	-	*	*	-	-	-	*
	*%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	-%	-%	-%	*%
Other	52	10	1	52	50	52	39	52	-	38	52	15	10	7	36
	13%	11%	12%	14%	14%	14%	12%	13%	-%	15%	14%	14%	18%	8%	14%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 51 (continuation)

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail. Excluding those with no problems

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	390	75	39	275	290	100	16	165	81	389	1	119	5
Weighted total	395	78	39	278	287	108	17	166	79	395	*	118	5
Amount / level of lost mail	162	29	16	117	121	41	7	58	34	162	-	51	2
	41%	38%	40%	42%	42%	38%	39%	35%	43%	41%	-%	43%	44%
Lost or late delivery of sent mail	73	13	9	51	51	22	5	28	18	73	-	21	-
	18%	17%	24%	18%	18%	21%	30%	17%	23%	18%	-%	18%	-%
Delivery time (when you receive your mail delivery)	63	16	1	46	57	6	1	14	22	63	-	24	2
	16%	20% b	3%	17% b	20% b	6%	6%	8%	28% a	16%	-%	20%	39%
Wrong mail delivered / our mail delivered elsewhere	49	12	1	35	36	13	3	21	10	49	-	18	-
	12%	16%	3%	13%	12%	12%	15%	13%	13%	12%	-%	15%	-%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45	9	5	31	35	10	1	18	15	45	-	16	-
	11%	11%	13%	11%	12%	9%	6%	11%	19%	11%	-%	13%	-%
Damaged mail / goods	32	8	4	21	21	11	2	20	7	32	-	4	4
	8%	10%	9%	8%	7%	11%	11%	12%	9%	8%	-%	3%	84%
Wrong postage / shortfall on incoming mail - having to pay	17	3	2	12	10	7	-	12	3	17	-	5	*
	4%	4%	5%	4%	3%	7%	-%	7%	4%	4%	-%	4%	10%
Trustworthiness of the provider	17	4	2	11	10	6	2	5	3	17	-	2	-
	4%	5%	5%	4%	4%	6%	11%	3%	4%	4%	-%	2%	-%
Accessibility of the sorting office / opening hours	8	2	*	6	6	1	-	*	7	8	-	2	-
	2%	2%	1%	2%	2%	1%	-%	*%	8% a	2%	-%	1%	-%
Collection reliability	6	-	1	5	4	2	*	3	*	6	-	3	-
	1%	-%	2%	2%	1%	2%	3%	2%	*%	1%	-%	2%	-%
Time of collection	5	-	-	5	4	1	-	1	2	5	-	2	-
	1%	-%	-%	2%	1%	1%	-%	1%	2%	1%	-%	2%	-%
Latest collection time	2	-	-	2	*	2	-	2	-	2	-	-	-
	1%	-%	-%	1%	*%	2%	-%	1%	-%	1%	-%	-%	-%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Account management (if applicable)	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	390	75	39	275	290	374	16	165	81	389	1	119	5
Weighted total	395	78	39	278	287	378	17	166	79	395	*	118	5
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	2	-	2	*	2	-	-	2	-	2	-	-	-
	*%	-%	5%	*%	1%	-%	-%	1%	-%	*%	-%	-%	-%
		c											
Don't know / na	*	*	-	-	*	-	-	-	*	-	*	-	-
	*%	*%	-%	-%	*%	-%	-%	-%	*%	-%	100%	-%	-%
Other	52	8	4	40	33	47	5	23	11	52	-	14	*
	13%	10%	9%	15%	11%	12%	31%	14%	13%	13%	-%	11%	10%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?
Base: All respondents who use Royal Mail. Excluding those with no problems

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	390	112	103	88	87
Weighted total	395	98	116	86	95
Amount / level of lost mail	162 41%	48 49% cd	57 49% cd	26 30%	31 33%
Lost or late delivery of sent mail	73 18%	8 8%	25 21% a	21 24% a	20 21% a
Delivery time (when you receive your mail delivery)	63 16%	20 20% d	16 14%	20 23% d	6 7%
Wrong mail delivered / our mail delivered elsewhere	49 12%	8 8%	13 11%	13 15%	15 16%
Delivery consistency / reliability (e.g. arrives as promised consistently)	45 11%	11 11% b	4 4%	17 20% b	13 14% b
Damaged mail / goods	32 8%	4 4%	9 8%	9 11%	10 10%
Wrong postage / shortfall on incoming mail - having to pay	17 4%	6 6%	2 2%	4 4%	6 6%
Trustworthiness of the provider	17 4%	9 9% b	2 2%	3 3%	2 3%
Accessibility of the sorting office / opening hours	8 2%	5 5% cd	3 3%	- -%	- -%
Collection reliability	6 1%	1 1%	2 2%	2 3%	* 1%
Time of collection	5 1%	* *% a	5 4%	- -%	- -%
Latest collection time	2 1%	2 2%	- -%	- -%	- -%
Availability of a daily collection	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c,d

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QRM4. Have you experienced any problems with your service from Royal Mail (as a sender or recipient of mail) in the last 6 months?

Base: All respondents who use Royal Mail. Excluding those with no problems

Significance Level: 95%

Unweighted total

Weighted total

Account management (if applicable)

No Problems

Problems with the Smart Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
390	112	103	88	87
395	98	116	86	95
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
2	-	2	-	-
*%	-%	2%	-%	-%
+	-	-	+	-
*%	-%	-%	*%	-%
52	16	10	8	18
13%	17%	9%	9%	19%
				b

Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	b	*c	*d	*e	f	g	*h	i	j	k	l	m
Unweighted total	390	15	31	24	25	25	42	44	27	30	47	45	35	263
Weighted total	395	25	51	33	20	24	55	59	48	32	19	16	12	349
Very Dissatisfied	32	4	7	4	*	3	4	2	4	1	1	1	1	28
	8%	14%	13%	12%	1%	12%	6%	3%	9%	4%	7%	8%	10%	8%
Fairly Dissatisfied	40	2	5	-	4	*	7	7	6	1	5	-	1	34
	10%	7%	10%	-%	21%	1%	13%	13%	13%	5%	26%	-%	8%	10%
			k				k	k			iklm			k
Neither Satisfied Nor Dissatisfied	51	-	6	9	2	5	11	6	6	*	2	2	2	46
	13%	-%	12%	27%	9%	23%	20%	9%	13%	1%	8%	13%	17%	13%
							i						i	i
Fairly Satisfied	38	*	4	*	1	6	7	8	2	4	2	2	*	34
	10%	1%	8%	*%	7%	28%	13%	13%	5%	13%	10%	13%	4%	10%
Very Satisfied	22	-	-	2	3	1	5	7	-	3	-	1	1	21
	6%	-%	-%	6%	13%	6%	10%	12%	-%	8%	-%	4%	6%	6%
							j	bj						
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	18	24	18	9	7	19	26	26	21	8	9	5	170
	49%	71%	47%	55%	47%	30%	35%	44%	55%	66%	44%	60%	41%	49%
										fi		f		
Don't Know (DO NOT READ OUT)	19	2	5	-	*	*	2	4	2	1	1	*	2	16
	5%	7%	9%	-%	2%	1%	3%	6%	5%	4%	3%	3%	13%	5%
													m	
NET: Satisfied	61	*	4	2	4	8	13	15	2	7	2	3	1	55
	15%	1%	8%	6%	20%	34%	23%	25%	5%	21%	10%	16%	10%	16%
NET: Dissatisfied	72	5	12	4	4	3	11	9	11	3	7	1	2	62
	18%	21%	23%	12%	22%	13%	19%	16%	22%	9%	36%	8%	18%	18%
											gikm			
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate

Royal Mail on the following aspects using a 5 point scale were 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	390	282	67	16	14	11	108	289	101	355	35	207	77	41	65
Weighted total	395	377	11	3	2	2	18	298	97	376	19	242	75	32	46
Very Dissatisfied	32	30	1	*	*	*	2	20	12	32	*	8	7	9	8
	8%	8%	8%	9%	13%	9%	9%	7%	12%	8%	1%	3%	9%	28%	18%
													a	ab	a
Fairly Dissatisfied	40	38	1	1	*	*	3	30	11	39	2	23	3	5	9
	10%	10%	11%	26%	19%	16%	15%	10%	11%	10%	8%	9%	5%	17%	19%
														b	ab
Neither Satisfied Nor Dissatisfied	51	49	2	*	*	*	2	42	10	49	2	31	8	5	7
	13%	13%	14%	4%	13%	12%	12%	14%	10%	13%	11%	13%	11%	14%	15%
Fairly Satisfied	38	36	*	1	1	1	2	28	10	36	2	22	12	3	2
	10%	10%	4%	25%	23%	32%	12%	10%	10%	10%	12%	9%	16%	8%	5%
													d		
Very Satisfied	22	22	1	-	-	-	1	16	6	22	*	16	3	-	3
	6%	6%	6%	-%	-%	-%	4%	5%	6%	6%	2%	7%	4%	-%	7%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	185	6	1	*	*	7	147	45	179	13	130	36	10	15
	49%	49%	50%	24%	16%	30%	40%	49%	46%	48%	65%	54%	48%	32%	33%
												cd			
Don't Know (DO NOT READ OUT)	19	17	1	*	*	-	2	14	5	19	-	13	5	*	1
	5%	5%	8%	12%	16%	-%	9%	5%	5%	5%	-%	5%	6%	1%	2%
NET: Satisfied	61	58	1	1	1	1	3	45	16	58	3	37	15	3	5
	15%	15%	10%	25%	23%	32%	16%	15%	16%	15%	14%	15%	20%	8%	12%
NET: Dissatisfied	72	68	2	1	1	*	4	50	22	70	2	30	10	14	17
	18%	18%	19%	35%	32%	25%	23%	17%	23%	19%	10%	13%	14%	44%	37%
													ab	ab	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate

Royal Mail on the following aspects using a 5 point scale were 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	390	118	77	46	69	37	36	7	303	25	22	19	21	102	37	70	69
Weighted total	395	141	87	56	67	29	12	3	316	28	14	20	18	95	41	63	72
Very Dissatisfied	32	13	5	2	6	4	2	*	19	2	2	2	7	10	9	8	11
	8%	9%	6%	3%	9%	13%	19%	5%	6%	7%	18%	10%	37%	11%	21%	13%	15%
							bc										
Fairly Dissatisfied	40	15	6	2	7	8	1	*	25	4	3	2	6	12	6	7	11
	10%	11%	7%	4%	11%	27%	10%	12%	8%	15%	22%	12%	31%	13%	14%	11%	15%
						abcd											
Neither Satisfied Nor Dissatisfied	51	17	12	5	12	3	1	2	40	4	2	4	1	14	2	6	10
	13%	12%	14%	8%	17%	9%	7%	75%	13%	14%	16%	19%	6%	15%	5%	10%	14%
Fairly Satisfied	38	12	7	9	9	*	1	*	34	2	2	*	*	6	5	7	5
	10%	9%	9%	15%	13%	*%	10%	4%	11%	7%	13%	1%	2%	7%	13%	11%	7%
				e	e												
Very Satisfied	22	6	9	1	4	2	1	-	14	3	*	2	3	5	2	3	4
	6%	4%	10%	1%	5%	7%	11%	-%	4%	11%	4%	9%	17%	6%	4%	5%	6%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	74	41	33	29	10	4	*	165	12	4	10	1	44	16	27	32
	49%	53%	47%	59%	44%	34%	35%	4%	52%	44%	28%	49%	7%	46%	38%	43%	44%
				ef													
Don't Know (DO NOT READ OUT)	19	2	7	5	1	3	1	-	18	*	-	*	-	3	2	5	*
	5%	2%	8%	10%	1%	9%	8%	-%	6%	2%	-%	1%	-%	3%	5%	7%	*%
			ad	ad		ad										b	
NET: Satisfied	61	18	16	9	12	2	3	*	48	5	2	2	3	12	7	10	9
	15%	13%	18%	16%	19%	7%	21%	4%	15%	18%	16%	10%	19%	13%	17%	16%	12%
NET: Dissatisfied	72	29	11	4	13	12	4	*	44	6	5	4	12	22	14	15	21
	18%	20%	12%	7%	19%	40%	29%	17%	14%	22%	40%	22%	68%	23%	35%	24%	30%
		c				abcd	bc										

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate
Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)
Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	390	150	94	145	366	256	372	222	133	318	208	369	91	304	303
Weighted total	395	169	86	139	364	243	370	214	108	324	199	368	69	301	293
Very Dissatisfied	32 8%	10 6%	8 9%	14 10%	24 7%	19 8%	24 6%	23 11%	11 10%	21 7%	24 b	25 7%	5 8%	19 6%	19 6%
Fairly Dissatisfied	40 10%	16 9%	8 9%	16 12%	38 10%	23 9%	38 10%	26 12%	11 10%	29 9%	23 12%	40 11%	11 16%	33 11%	35 12%
Neither Satisfied Nor Dissatisfied	51 13%	17 10%	8 9%	27 19% ab	48 13%	36 15%	49 13%	27 13%	16 15%	42 13%	28 14%	48 13%	8 11%	42 14%	37 13%
Fairly Satisfied	38 10%	9 5%	18 21% ac	10 7%	37 10%	28 12%	38 10%	31 14% e	8 7%	30 9%	29 14%	37 10%	5 8%	30 10%	26 9%
Very Satisfied	22 6%	12 7%	2 3%	8 6%	21 6%	14 6%	21 6%	15 7%	8 8%	18 6%	12 6%	21 6%	4 7%	15 5%	18 6%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192 49%	97 57% c	41 48%	54 39%	178 49% d	110 45%	182 49% d	85 40%	50 47%	165 51% d	74 37%	179 49% a	32 47%	148 49%	142 48%
Don't Know (DO NOT READ OUT)	19 5%	8 5%	1 1%	10 7% b	19 5%	14 6%	19 5%	7 3%	3 2%	18 6%	8 4%	18 5%	3 4%	15 5%	16 6%
NET: Satisfied	61 15%	21 13%	20 24% ac	18 13%	57 16%	42 17%	59 16%	46 22% f	16 15%	48 15%	41 21%	57 16%	10 14%	45 15%	44 15%
NET: Dissatisfied	72 18%	26 16%	16 18%	30 22%	61 17%	42 17%	61 17%	49 23% f	23 21%	50 16%	48 24%	64 17%	16 23%	51 17%	54 18%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate
Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)
Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	390	95	10	288	383	353	385	324	388	-	260	385	119	55	80	255
Weighted total	395	85	10	303	383	348	385	331	391	-	253	387	101	54	83	258
Very Dissatisfied	32	8	-	24	30	32	32	29	32	-	27	32	11	10	9	13
	8%	9%	-%	8%	8%	9%	8%	9%	8%	-%	11%	8%	11%	18% c	11%	5%
Fairly Dissatisfied	40	11	1	28	40	36	40	34	40	-	24	40	13	7	5	28
	10%	13%	12%	9%	11%	10%	10%	10%	10%	-%	9%	10%	13%	13%	6%	11%
Neither Satisfied Nor Dissatisfied	51	14	-	37	49	47	49	46	49	-	37	51	10	5	10	36
	13%	17%	-%	12%	13%	14%	13%	14%	13%	-%	15%	13%	10%	9%	12%	14%
Fairly Satisfied	38	5	2	31	36	32	36	29	37	-	22	36	11	8	12	19
	10%	6%	22%	10%	9%	9%	9%	9%	9%	-%	9%	9%	11%	14%	14%	7%
Very Satisfied	22	1	1	21	21	17	21	19	22	-	18	21	9	6	*	16
	6%	2%	12%	7%	5%	5%	5%	6%	6%	-%	7%	5%	9%	11% b	-%	6%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	41	5	148	190	166	190	159	192	-	113	188	46	19	45	128
	49%	48%	49%	49%	50%	48%	49%	48%	49%	-%	45%	49%	46%	35%	54% a	50%
Don't Know (DO NOT READ OUT)	19	4	*	14	17	17	17	15	19	-	13	19	1	-	2	17
	5%	5%	5%	5%	4%	5%	4%	4%	5%	-%	5% c	5% c	1%	-%	2%	7%
NET: Satisfied	61	7	4	52	57	49	57	47	59	-	40	57	20	14	12	35
	15%	8%	34%	17% a	15%	14%	15%	14%	15%	-%	16%	15%	20%	25% c	14%	14%
NET: Dissatisfied	72	19	1	52	70	68	72	64	72	-	51	72	25	17	14	41
	18%	22%	12%	17%	18%	19%	19%	19%	18%	-%	20%	19%	24%	30% c	17%	16%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Table 52 (continuation)

Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate

Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	390	75	39	275	290	100	374	16	165	81	389	1	119	5
Weighted total	395	78	39	278	287	108	378	17	166	79	395	*	118	5
Very Dissatisfied	32	9	9	13	23	9	31	1	4	16	32	-	15	2
	8%	12%	24%	5%	8%	9%	8%	6%	2%	20%	8%	-%	13%	39%
		c	c							a				
Fairly Dissatisfied	40	12	8	20	30	11	36	5	8	11	40	-	18	-
	10%	16%	21%	7%	10%	10%	9%	28%	5%	13%	10%	-%	15%	-%
		c	c							a				
Neither Satisfied Nor Dissatisfied	51	12	3	36	41	11	51	*	21	10	51	-	15	*
	13%	16%	7%	13%	14%	10%	13%	3%	12%	13%	13%	-%	13%	5%
Fairly Satisfied	38	7	4	27	33	6	38	*	17	9	38	-	11	*
	10%	9%	11%	10%	11%	5%	10%	3%	10%	12%	10%	-%	10%	10%
Very Satisfied	22	7	3	13	16	7	22	-	12	2	22	-	4	-
	6%	9%	7%	5%	5%	6%	6%	-%	7%	3%	6%	-%	3%	-%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	28	12	152	134	59	182	10	93	30	192	-	53	-
	49%	36%	31%	55%	47%	54%	48%	58%	56%	37%	49%	-%	44%	-%
				ab					b					
Don't Know (DO NOT READ OUT)	19	2	-	16	12	7	18	*	12	2	19	*	2	2
	5%	3%	-%	6%	4%	6%	5%	3%	7%	2%	5%	100%	2%	46%
NET: Satisfied	61	14	7	40	49	12	60	*	29	12	61	-	15	*
	15%	18%	17%	14%	17%	11%	16%	3%	17%	15%	15%	-%	13%	10%
NET: Dissatisfied	72	21	18	33	52	20	67	6	12	27	72	-	33	2
	18%	27%	45%	12%	18%	19%	18%	34%	7%	34%	18%	-%	28%	39%
		c	c							a				

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate
Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)
Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	390	112	103	88	87
Weighted total	395	98	116	86	95
Very Dissatisfied	32	10	8	3	11
	8%	10%	7%	3%	12%
					c
Fairly Dissatisfied	40	14	4	7	15
	10%	14%	3%	9%	15%
		b			b
Neither Satisfied Nor Dissatisfied	51	14	16	9	12
	13%	15%	14%	10%	12%
Fairly Satisfied	38	11	11	7	9
	10%	11%	9%	8%	10%
Very Satisfied	22	7	10	2	3
	6%	7%	9%	3%	3%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	31	61	55	45
	49%	32%	52%	64%	47%
			a	ad	a
Don't Know (DO NOT READ OUT)	19	10	6	2	*
	5%	11%	5%	2%	1%
		cd			
NET: Satisfied	61	18	21	10	13
	15%	18%	18%	11%	13%
NET: Dissatisfied	72	24	12	10	26
	18%	24%	10%	12%	27%
		bc			bc

Columns Tested: a,b,c,d

Table 53

Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%														
Unweighted total	390	a	b	c	d	e	f	g	h	i	j	k	l	m
Weighted total	395	15	31	24	25	25	42	44	27	30	47	45	35	263
		25	51	33	20	24	55	59	48	32	19	16	12	349
Very Dissatisfied	56	5	9	4	6	4	5	7	8	1	3	1	1	51
	14%	21%	18%	12%	28%	17%	10%	12%	18%	5%	16%	8%	11%	15%
Fairly Dissatisfied	33	-	5	2	*	3	7	6	2	3	4	1	1	27
	8%	-%	10%	5%	1%	11%	13%	10%	4%	8%	21% m	7%	10%	8%
Neither Satisfied Nor Dissatisfied	36	-	2	2	2	2	8	7	6	3	1	2	2	31
	9%	-%	4%	5%	9%	7%	14%	12%	13%	9%	7%	11%	13%	9%
Fairly Satisfied	39	2	6	-	1	8	11	6	2	*	1	1	*	36
	10%	8%	12%	-%	7%	33%	19% ikl	9%	4%	1%	7%	4%	4%	10%
Very Satisfied	18	-	-	4	1	*	4	4	*	3	*	1	1	15
	5%	-%	-%	12%	6%	1%	6%	6%	1%	8%	2%	8%	6%	4%
Have not Contacted / Not Applicable (DO NOT READ OUT)	188	16	24	18	9	7	19	26	24	21	8	9	5	166
	48%	64%	47%	55%	47%	30%	35%	44%	50%	66% fl	44%	60% f	41%	48%
Don't Know (DO NOT READ OUT)	24	2	5	4	*	*	2	4	5	1	1	*	2	22
	6%	7%	9%	11%	1%	1%	3%	6%	9%	4%	3%	3%	14%	6%
NET: Satisfied	56	2	6	4	3	8	14	9	2	3	2	2	1	52
	14%	8%	12%	12%	14%	34%	26%	15%	5%	9%	10%	11%	10%	15%
NET: Dissatisfied	90	5	14	6	6	7	13	13	11	4	7	2	2	78
	23%	21%	27%	18%	29%	28%	23%	22%	22%	13%	37% ikm	14%	21%	22%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	390	282	67	16	14	11	108	289	101	355	35	207	77	41	65
Weighted total	395	377	11	3	2	2	18	298	97	376	19	242	75	32	46
Very Dissatisfied	56	54	1	1	*	*	3	40	17	55	2	20	10	10	16
	14%	14%	13%	28%	13%	18%	16%	13%	17%	15%	9%	8%	13%	31%	35%
														ab	ab
Fairly Dissatisfied	33	32	1	*	*	*	2	27	6	33	*	20	5	3	5
	8%	8%	8%	9%	19%	19%	10%	9%	6%	9%	2%	8%	7%	10%	11%
Neither Satisfied Nor Dissatisfied	36	34	1	*	*	*	2	25	11	34	2	20	9	4	3
	9%	9%	13%	15%	21%	9%	14%	8%	11%	9%	11%	8%	12%	13%	6%
Fairly Satisfied	39	38	*	-	1	*	1	29	10	37	2	25	8	4	2
	10%	10%	1%	-%	23%	7%	4%	10%	10%	10%	10%	10%	11%	11%	4%
Very Satisfied	18	17	1	*	-	*	1	12	6	17	1	12	2	*	4
	5%	4%	6%	12%	-%	16%	7%	4%	6%	5%	3%	5%	2%	1%	8%
Have not Contacted / Not Applicable (DO NOT READ OUT)	188	181	6	1	*	*	7	147	41	176	13	126	36	10	15
	48%	48%	50%	24%	16%	30%	40%	49%	42%	47%	65%	52%	48%	32%	33%
											a	cd			
Don't Know (DO NOT READ OUT)	24	23	1	*	*	-	2	17	7	24	-	18	5	*	1
	6%	6%	9%	12%	8%	-%	9%	6%	7%	7%	-%	8%	6%	1%	2%
NET: Satisfied	56	54	1	*	1	*	2	41	16	54	3	37	10	4	5
	14%	14%	7%	12%	23%	23%	11%	14%	16%	14%	13%	15%	13%	13%	12%
NET: Dissatisfied	90	85	2	1	1	1	5	67	23	88	2	40	15	13	21
	23%	23%	21%	37%	32%	37%	26%	23%	23%	23%	11%	17%	20%	41%	47%
														ab	ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	390	118	77	46	69	37	36	7	303	25	22	19	21	102	37	70	69
Weighted total	395	141	87	56	67	29	12	3	316	28	14	20	18	95	41	63	72
Very Dissatisfied	56	24	7	4	7	11	3	*	34	6	5	2	10	20	12	14	18
	14%	17%	8%	7%	11%	39%	25%	5%	11%	21%	34%	11%	54%	21%	28%	21%	25%
						abcd	bc										
Fairly Dissatisfied	33	12	8	5	7	*	2	*	26	2	2	*	3	8	7	5	10
	8%	8%	9%	8%	10%	2%	13%	12%	8%	7%	16%	2%	18%	8%	17%	8%	13%
Neither Satisfied Nor Dissatisfied	36	10	8	3	11	3	*	*	30	*	2	4	*	12	2	9	6
	9%	7%	9%	6%	17%	9%	3%	8%	9%	1%	16%	18%	2%	13%	5%	14%	8%
					af												
Fairly Satisfied	39	12	9	5	9	2	2	-	30	3	*	2	3	6	1	4	3
	10%	9%	11%	9%	13%	6%	15%	-%	9%	12%	1%	10%	18%	6%	3%	6%	4%
Very Satisfied	18	4	7	1	2	*	*	2	12	4	1	2	-	1	2	*	2
	5%	3%	8%	2%	3%	1%	3%	70%	4%	13%	5%	9%	-%	1%	4%	1%	3%
Have not Contacted / Not Applicable (DO NOT READ OUT)	188	71	41	33	29	10	4	*	161	12	4	10	1	44	16	27	32
	48%	50%	47%	59%	44%	34%	35%	4%	51%	44%	28%	49%	7%	46%	38%	43%	44%
				ef													
Don't Know (DO NOT READ OUT)	24	8	7	5	1	3	1	-	24	*	-	*	*	4	2	5	2
	6%	6%	8%	10%	1%	9%	6%	-%	7%	2%	-%	1%	1%	5%	5%	7%	3%
				d													
NET: Satisfied	56	17	17	6	11	2	2	2	42	7	1	4	3	6	3	4	5
	14%	12%	19%	11%	16%	7%	17%	70%	13%	25%	6%	19%	18%	7%	8%	7%	7%
NET: Dissatisfied	90	36	15	8	14	12	5	*	60	8	7	3	13	28	18	18	28
	23%	25%	17%	15%	22%	40%	38%	17%	19%	28%	49%	13%	73%	29%	45%	29%	38%
					bcd	bc											

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
390	150	94	145	366	256	372	222	133	318	208	369	91	304	303
395	169	86	139	364	243	370	214	108	324	199	368	69	301	293
56	21	14	21	46	34	46	44	15	35	43	49	11	41	37
14%	13%	16%	15%	13%	14%	12%	21%	13%	11%	22%	13%	16%	13%	13%
				acf						b				
33	10	8	16	33	21	33	18	9	29	20	33	11	30	26
8%	6%	9%	11%	9%	9%	9%	8%	9%	9%	10%	9%	16%	10%	9%
36	8	8	20	34	26	34	21	14	32	18	34	4	29	28
9%	5%	10%	14% a	9%	11%	9%	10%	13%	10%	9%	9%	6%	10%	10%
39	18	11	9	36	22	38	23	11	29	20	36	6	25	29
10%	11%	13%	6%	10%	9%	10%	11%	10%	9%	10%	10%	9%	8%	10%
18	7	3	8	16	11	16	14	7	15	12	16	2	12	13
5%	4%	3%	6%	4%	5%	4%	6%	6%	5%	6%	4%	2%	4%	4%
188	93	41	54	174	110	178	85	50	161	74	175	32	144	140
46%	55% c	48%	39%	48%	45%	48%	40%	47%	50% d	37%	48% a	47%	48%	48%
24	12	1	12	24	18	24	8	3	22	12	24	3	21	20
6%	7% b	1%	9% b	7%	7%	7%	4%	3%	7%	6%	7%	4%	7%	7%
56	25	13	17	52	33	54	37	17	44	32	52	8	37	42
14%	15%	16%	12%	14%	14%	15%	17%	16%	14%	16%	14%	11%	12%	14%
90	31	22	37	79	56	79	62	24	64	63	82	22	70	63
23%	18%	26%	26%	22%	23%	21%	29%	22%	20%	32% b	22%	32%	23%	22%
							acf							

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	390	95	10	288	383	353	385	324	388	-	260	385	119	55	80	255
Weighted total	395	85	10	303	383	348	385	331	391	-	253	387	101	54	83	258
Very Dissatisfied	56 14%	12 15%	1 12%	43 14%	54 14%	54 16%	56 15%	52 16%	56 14%	- -%	45 18%	56 15%	21 20%	14 25%	12 15%	30 12%
Fairly Dissatisfied	33 8%	6 8%	- -%	27 9%	33 9%	29 8%	33 9%	24 7%	31 8%	- -%	21 8%	33 9%	11 11%	7 13%	4 5%	22 9%
Neither Satisfied Nor Dissatisfied	36 9%	9 10%	* 5%	27 9%	34 9%	34 10%	34 9%	33 10%	36 9%	- -%	19 7%	36 9%	5 5%	4 8%	3 4%	29 11%
Fairly Satisfied	39 10%	12 14%	3 30%	25 8%	34 9%	27 8%	35 9%	30 9%	37 9%	- -%	22 9%	35 9%	12 12%	8 16%	15 18%	15 6%
Very Satisfied	18 5%	* *%	- -%	18 6% a	18 5%	16 5%	18 5%	17 5%	18 5%	- -%	17 7%	18 5%	6 6%	2 3%	* *%	16 6% b
Have not Contacted / Not Applicable (DO NOT READ OUT)	188 48%	41 48%	5 49%	144 48%	188 49%	166 48%	188 49%	157 48%	188 48%	- -%	113 45%	186 48%	46 46%	19 35%	45 54% a	124 48%
Don't Know (DO NOT READ OUT)	24 6%	4 4%	* 5%	20 7%	21 5%	21 6%	21 5%	18 6%	24 6%	- -%	16 6% c	22 6% c	1 1%	* *% c	4 4% a	21 8% a
NET: Satisfied	56 14%	12 15%	3 30%	42 14%	52 14%	43 12%	53 14%	46 14%	55 14%	- -%	40 16%	53 14%	18 18%	10 18%	15 18%	31 12%
NET: Dissatisfied	90 23%	19 22%	1 12%	70 23%	88 23%	83 24%	90 23%	76 23%	88 22%	- -%	65 26%	90 23%	31 31%	21 38% bc	16 20%	53 20%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	390	75	39	275	290	100	374	16	165	81	389	1	119	5
Weighted total	395	78	39	278	287	108	378	17	166	79	395	*	118	5
Very Dissatisfied	56	14	17	26	40	17	53	3	6	22	56	-	28	2
	14%	17%	42%	9%	14%	16%	14%	18%	4%	28%	14%	-%	24%	39%
		ac								a				
Fairly Dissatisfied	33	12	1	20	26	8	31	3	10	10	33	-	14	*
	8%	16%	4%	7%	9%	7%	8%	15%	6%	12%	8%	-%	11%	10%
		c												
Neither Satisfied Nor Dissatisfied	36	10	2	24	28	8	36	*	17	9	36	-	14	*
	9%	13%	6%	8%	10%	8%	9%	3%	10%	11%	9%	-%	12%	5%
Fairly Satisfied	39	9	5	24	36	3	39	-	19	7	39	-	4	-
	10%	12%	14%	9%	12%	3%	10%	-%	12%	9%	10%	-%	3%	-%
					b									
Very Satisfied	18	2	1	14	12	5	17	*	9	1	18	-	3	-
	5%	3%	3%	5%	4%	5%	5%	3%	6%	1%	5%	-%	2%	-%
Have not Contacted / Not Applicable (DO NOT READ OUT)	188	28	12	148	132	56	178	10	91	28	188	-	53	-
	48%	36%	31%	53%	46%	52%	47%	58%	55%	35%	48%	-%	44%	-%
				ab					b					
Don't Know (DO NOT READ OUT)	24	2	-	22	14	11	24	*	14	3	24	*	4	2
	6%	3%	-%	8%	5%	10%	6%	3%	8%	4%	6%	100%	3%	48%
NET: Satisfied	56	11	7	38	48	8	56	*	28	8	56	-	6	-
	14%	15%	17%	14%	17%	8%	15%	3%	17%	10%	14%	-%	5%	-%
					b									
NET: Dissatisfied	90	26	18	46	65	25	84	6	16	32	90	-	42	2
	23%	33%	46%	17%	23%	23%	22%	34%	10%	40%	23%	-%	35%	49%
		c	c						a					

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	390	112	103	88	87
Weighted total	395	98	116	86	95
Very Dissatisfied	56 14%	13 13%	12 10%	8 9%	24 25%
					abc
Fairly Dissatisfied	33 8%	15 15%	8 7%	3 4%	8 8%
		c			
Neither Satisfied Nor Dissatisfied	36 9%	13 13%	13 11%	8 9%	2 2%
		d	d	d	
Fairly Satisfied	39 10%	8 9%	11 10%	8 10%	11 11%
Very Satisfied	18 5%	7 8%	5 5%	3 3%	2 2%
Have not Contacted / Not Applicable (DO NOT READ OUT)	188 48%	31 32%	59 50%	53 62%	45 47%
			a	ad	a
Don't Know (DO NOT READ OUT)	24 6%	10 10%	8 7%	2 3%	4 4%
		c			
NET: Satisfied	56 14%	16 16%	17 14%	11 13%	13 13%
NET: Dissatisfied	90 23%	27 28%	20 17%	11 13%	32 33%
		c			bc

Columns Tested: a,b,c,d

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	b	*c	*d	*e	f	g	*h	i	j	k	l	m
Unweighted total	390	15	31	24	25	25	42	44	27	30	47	45	35	263
Weighted total	395	25	51	33	20	24	55	59	48	32	19	16	12	349
Very Dissatisfied	8 2%	2 7%	- -	2 6%	* 1%	- -	- -	2 3%	- -	1 4%	* 2%	- -	* 4%	7 2%
Fairly Dissatisfied	11 3%	- -	5 9%	2 5%	- -	- -	- -	* %	2 4%	- -	1 7%	* 3%	* 1%	9 2%
Neither Satisfied Nor Dissatisfied	41 10%	2 7%	5 10%	* %	3 15%	3 11%	14 26%	4 6%	4 9%	1 5%	3 15%	1 9%	* 3%	36 10%
Fairly Satisfied	67 17%	2 8%	8 17%	4 11%	3 15%	8 35%	9 17%	13 22%	11 23%	2 5%	3 17%	1 4%	2 19%	60 17%
Very Satisfied	52 13%	2 7%	5 9%	4 12%	4 20%	4 17%	9 16%	11 19%	2 4%	5 16%	2 9%	3 19%	2 14%	46 13%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192 49%	16 64%	24 47%	20 60%	9 47%	7 31%	21 38%	26 44%	24 50%	21 66%	8 44%	9 60%	5 41%	170 49%
Don't Know (DO NOT READ OUT)	25 6%	2 7%	5 9%	2 5%	1 3%	1 6%	2 3%	4 6%	5 9%	1 4%	1 6%	1 4%	2 17%	21 6%
NET: Satisfied	118 30%	4 15%	13 25%	8 23%	7 35%	12 52%	18 33%	24 41%	13 27%	7 21%	5 26%	4 24%	4 34%	106 30%
NET: Dissatisfied	19 5%	2 7%	5 9%	4 11%	* 1%	- -	- -	2 3%	2 4%	1 4%	2 10%	* 3%	1 5%	16 4%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m											f			

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	390	282	67	16	14	11	108	289	101	355	35	207	77	41	65
Weighted total	395	377	11	3	2	2	18	298	97	376	19	242	75	32	46
Very Dissatisfied	8	8	*	-	*	-	*	6	2	8	-	*	4	2	2
	2%	2%	1%	-%	8%	-%	2%	2%	2%	2%	-%	*%	5%	6%	4%
												a	a	a	a
Fairly Dissatisfied	11	10	-	-	*	*	1	10	*	11	*	7	1	*	2
	3%	3%	-%	-%	19%	9%	3%	3%	*%	3%	1%	3%	1%	1%	5%
Neither Satisfied Nor Dissatisfied	41	39	1	*	-	*	2	30	11	39	2	20	6	4	10
	10%	10%	10%	12%	-%	28%	10%	10%	11%	10%	9%	8%	9%	14%	21%
														ab	ab
Fairly Satisfied	67	63	2	1	1	*	4	48	19	64	2	34	12	11	9
	17%	17%	17%	32%	32%	9%	21%	16%	19%	17%	12%	14%	15%	35%	21%
														ab	
Very Satisfied	52	50	1	1	*	*	2	35	17	50	2	34	11	1	6
	13%	13%	10%	18%	8%	23%	12%	12%	17%	13%	11%	14%	15%	2%	13%
												c	c		
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	185	6	1	*	*	7	151	41	179	13	130	36	11	15
	49%	49%	53%	24%	16%	30%	42%	51%	42%	48%	66%	54%	48%	34%	33%
											a	cd			
Don't Know (DO NOT READ OUT)	25	23	1	*	*	-	2	18	7	25	-	17	5	3	1
	6%	6%	9%	14%	16%	-%	10%	6%	7%	7%	-%	7%	6%	8%	3%
NET: Satisfied	118	113	3	1	1	1	6	83	35	114	5	68	23	12	15
	30%	30%	27%	50%	40%	32%	33%	28%	36%	30%	23%	28%	31%	37%	33%
NET: Dissatisfied	19	18	*	-	1	*	1	16	3	18	*	7	5	2	4
	5%	5%	1%	-%	27%	9%	5%	5%	3%	5%	1%	3%	6%	7%	9%
															a

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	390	118	77	46	69	37	36	7	303	25	22	19	21	102	37	70	69
Weighted total	395	141	87	56	67	29	12	3	316	28	14	20	18	95	41	63	72
Very Dissatisfied	8	2	2	-	4	*	-	-	6	2	*	-	-	3	4	3	4
	2%	1%	3%	-%	5%	1%	-%	-%	2%	6%	4%	-%	-%	3%	9%	5%	5%
Fairly Dissatisfied	11	7	2	-	1	-	1	*	8	2	*	*	-	3	2	3	3
	3%	5%	2%	-%	1%	-%	5%	12%	3%	6%	3%	1%	-%	3%	6%	4%	4%
Neither Satisfied Nor Dissatisfied	41	15	9	1	7	7	2	*	27	2	4	2	6	12	4	5	11
	10%	10%	10%	2%	11%	23%	16%	5%	9%	7%	26%	12%	33%	13%	9%	8%	15%
					ac	c											
Fairly Satisfied	67	16	14	9	17	6	2	2	47	6	3	6	5	14	5	10	9
	17%	11%	16%	16%	26%	21%	18%	70%	15%	23%	21%	29%	27%	14%	13%	15%	13%
				a													
Very Satisfied	52	19	12	7	8	2	2	*	39	3	2	2	6	13	6	11	8
	13%	14%	14%	13%	13%	8%	17%	8%	12%	11%	16%	9%	34%	13%	15%	17%	11%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	74	40	33	29	11	4	*	165	12	4	10	1	46	16	27	34
	49%	53%	47%	59%	44%	36%	35%	4%	52%	44%	28%	49%	7%	49%	38%	43%	47%
				ef													
Don't Know (DO NOT READ OUT)	25	8	7	5	*	3	1	-	24	*	*	*	-	4	4	5	4
	6%	6%	8%	10%	1%	10%	10%	-%	8%	2%	1%	1%	-%	4%	11%	7%	5%
			d	d	d	d	d										
NET: Satisfied	118	35	26	16	26	9	4	2	86	9	5	8	11	26	11	20	17
	30%	25%	30%	29%	39%	29%	35%	79%	27%	34%	37%	38%	60%	28%	28%	32%	24%
NET: Dissatisfied	19	9	4	-	4	*	1	*	14	4	1	*	-	6	6	6	6
	5%	6%	5%	-%	6%	1%	5%	12%	4%	13%	7%	1%	-%	7%	14%	9%	9%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	390	150	94	145	366	256	372	222	133	318	208	369	91	304	303
Weighted total	395	169	86	139	364	243	370	214	108	324	199	368	69	301	293
Very Dissatisfied	8 2%	1 %	7 8% ac	1 %	6 2%	6 3%	6 2%	8 4%	6 6% acf	4 1%	6 3%	6 2%	1 1%	6 2%	6 2%
Fairly Dissatisfied	11 3%	5 3%	3 3%	3 2%	6 2%	3 1%	6 2%	5 3%	1 1%	4 1%	6 3%	6 2%	2 3%	6 2%	4 1%
Neither Satisfied Nor Dissatisfied	41 10%	13 7%	8 9%	20 15% a	37 10%	25 10%	37 10%	26 12%	9 8%	35 11%	25 13%	38 10%	10 14%	32 11%	32 11%
Fairly Satisfied	67 17%	25 15%	14 16%	26 19%	66 18%	46 19%	66 18%	40 19%	22 20%	53 16%	40 20%	66 18%	10 15%	51 17%	53 18%
Very Satisfied	52 13%	20 12%	10 12%	22 16%	46 13%	32 13%	47 13%	37 17%	15 14%	41 13%	34 17%	48 13%	8 12%	37 12%	36 12%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192 49%	92 55% c	44 51%	56 40%	178 49%	113 47%	182 49%	89 42%	50 47%	163 50% d	77 39%	179 49% a	34 50%	148 49%	142 48%
Don't Know (DO NOT READ OUT)	25 6%	14 8% b	1 1%	11 8% b	25 7%	17 7%	25 7%	9 4%	5 4%	23 7%	11 5%	25 7%	3 5%	21 7%	21 7%
NET: Satisfied	118 30%	45 27%	24 28%	48 35%	111 31%	78 32%	114 31%	77 36%	37 34%	94 29%	74 37%	113 31%	19 27%	88 29%	89 30%
NET: Dissatisfied	19 5%	5 3%	10 11% ac	4 3%	13 3%	10 4%	13 3%	13 f	8 6% f	8 7% f	12 6%	13 3%	3 4%	12 4%	10 4%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	390	95	10	288	383	353	385	324	388	-	260	385	119	55	80	255
Weighted total	395	85	10	303	383	348	385	331	391	-	253	387	101	54	83	258
Very Dissatisfied	8	3	-	5	8	8	8	8	8	-	8	8	2	*	3	5
	2%	3%	-%	2%	2%	2%	2%	2%	2%	-%	3%	2%	2%	*%	3%	2%
Fairly Dissatisfied	11	1	-	10	9	8	11	10	11	-	8	11	5	3	*	7
	3%	1%	-%	3%	2%	2%	3%	3%	3%	-%	3%	3%	5%	5%	1%	3%
Neither Satisfied Nor Dissatisfied	41	9	1	30	39	38	39	37	41	-	27	41	13	9	10	22
	10%	11%	12%	10%	10%	11%	10%	11%	10%	-%	11%	11%	13%	17%	12%	8%
Fairly Satisfied	67	20	2	45	64	58	64	55	65	-	40	64	13	6	13	47
	17%	23%	17%	15%	17%	17%	17%	17%	17%	-%	16%	17%	13%	12%	16%	16%
Very Satisfied	52	5	2	46	50	44	50	41	50	-	37	50	19	16	4	32
	13%	6%	17%	15%	13%	13%	13%	12%	13%	-%	15%	13%	19%	30%	4%	12%
				a										bc		b
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	41	5	148	192	171	192	162	192	-	117	190	48	19	49	124
	49%	48%	49%	49%	50%	49%	50%	49%	49%	-%	46%	49%	47%	35%	59%	48%
														a		
Don't Know (DO NOT READ OUT)	25	6	*	19	21	21	21	18	25	-	16	23	1	*	4	21
	6%	7%	5%	6%	6%	6%	6%	5%	6%	-%	6%	6%	1%	*%	5%	8%
											c	c				a
NET: Satisfied	118	25	4	91	114	102	115	96	115	-	77	114	33	23	17	79
	30%	29%	34%	30%	30%	29%	30%	29%	29%	-%	30%	30%	32%	42%	20%	31%
														b		
NET: Dissatisfied	19	4	-	15	16	16	19	18	19	-	16	19	7	3	3	12
	5%	4%	-%	5%	4%	5%	5%	5%	5%	-%	6%	5%	7%	5%	4%	5%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	390	75	39	275	290	100	374	16	165	81	389	1	119	5
Weighted total	395	78	39	278	287	108	378	17	166	79	395	*	118	5
Very Dissatisfied	8 2%	4 5%	1 2%	4 1%	6 2%	1 1%	8 2%	- -	2 1%	5 7% a	8 2%	- -	5 4%	2 39%
Fairly Dissatisfied	11 3%	5 6%	1 2%	5 2%	6 2%	5 5%	8 2%	3 18%	- -	9 12% a	11 3%	- -	5 5%	- -
Neither Satisfied Nor Dissatisfied	41 10%	8 10%	11 29% ac	22 8%	31 11%	10 9%	40 11%	* 3%	8 5%	9 11%	41 10%	- -	14 12%	- -
Fairly Satisfied	67 17%	18 23%	7 18%	41 15%	58 20% b	9 8%	64 17%	3 15%	25 15%	17 22%	67 17%	- -	18 15%	* 3%
Very Satisfied	52 13%	13 17%	7 18%	31 11%	36 12%	16 15%	51 14%	* 3%	26 16% b	5 6%	52 13%	- -	15 12%	1 13%
Have not Contacted / Not Applicable (DO NOT READ OUT)	192 49%	28 36%	12 31%	152 55% ab	134 47%	58 53%	182 48%	10 58%	91 54% b	30 38%	192 49%	- -	55 46%	- -
Don't Know (DO NOT READ OUT)	25 6%	2 3%	- -	23 8%	16 6%	9 9%	25 7%	* 3%	14 9%	4 5%	25 6%	* 100%	6 5%	2 46%
NET: Satisfied	118 30%	32 41% c	14 36%	73 26%	93 33%	25 23%	115 30%	3 18%	51 31%	22 27%	118 30%	- -	33 28%	1 16%
NET: Dissatisfied	19 5%	8 10% c	2 4%	9 3%	12 4%	7 6%	16 4%	3 18%	2 1%	15 18% a	19 5%	- -	10 9%	2 39%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 54 (continuation)

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	390	112	103	88	87
Weighted total	395	98	116	86	95
Very Dissatisfied	8	2	2	*	4
	2%	2%	2%	*%	4%
Fairly Dissatisfied	11	2	-	2	7
	3%	2%	-%	2%	7%
					b
Neither Satisfied Nor Dissatisfied	41	10	9	9	13
	10%	10%	8%	11%	14%
Fairly Satisfied	67	21	22	9	15
	17%	22%	19%	10%	16%
		c			
Very Satisfied	52	20	16	6	10
	13%	21%	13%	7%	10%
		cd			
Have not Contacted / Not Applicable (DO NOT READ OUT)	192	32	58	55	47
	49%	33%	50%	64%	49%
			a	ad	a
Don't Know (DO NOT READ OUT)	25	11	10	4	*
	6%	11%	9%	4%	1%
		d	d		
NET: Satisfied	118	42	37	15	24
	30%	43%	32%	18%	25%
		cd	c		
NET: Dissatisfied	19	4	2	2	11
	5%	4%	2%	3%	11%
					bc

Columns Tested: a,b,c,d

Table 55

QRM5. SUMMARY. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects ...

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months

	Aspects		
	Professionalism and handling of any query / complaint	Ability to resolve my query	The staff being polite and courteous
Significance Level: 95%	a	b	c
Unweighted total	390	390	390
Weighted total	395	395	395
Very Dissatisfied	32 8% c	56 14% ac	8 2%
Fairly Dissatisfied	40 10% c	33 8% c	11 3%
Neither Satisfied Nor Dissatisfied	51 13%	36 9%	41 10%
Fairly Satisfied	38 10%	39 10%	67 17% ab
Very Satisfied	22 6%	18 5%	52 13% ab
Have not Contacted / Not Applicable (DO NOT READ OUT)	192 49%	188 48%	192 49%
Don't Know (DO NOT READ OUT)	19 5%	24 6%	25 6%
NET: Satisfied	61 15%	56 14%	118 30% ab
NET: Dissatisfied	72 18% c	90 23% c	19 5%
Columns Tested: a,b,c			

Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale were 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months excluding have not contacted / not applicable

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m
Unweighted total	209	5	17	13	16	17	23	25	12	11	28	20	22	139
Weighted total	203	7	27	15	11	17	36	33	22	11	11	6	7	179
Very Dissatisfied	32	4	7	4	*	3	4	2	4	1	1	1	1	28
	16%	49%	25%	27%	2%	17%	10%	5%	19%	12%	13%	19%	17%	16%
Fairly Dissatisfied	40	2	5	-	4	*	7	7	6	1	5	-	1	34
	20%	25%	19%	-%	40%	1%	20%	22%	29%	14%	50%	-%	13%	19%
Neither Satisfied Nor Dissatisfied	51	-	6	9	2	5	11	6	6	*	2	2	2	46
	25%	-%	23%	60%	17%	33%	30%	17%	29%	2%	14%	32%	30%	26%
Fairly Satisfied	38	*	4	*	1	6	7	8	2	4	2	2	*	34
	19%	2%	16%	1%	14%	39%	20%	23%	11%	37%	18%	32%	7%	19%
Very Satisfied	22	-	-	2	3	1	5	7	-	3	-	1	1	21
	11%	-%	-%	13%	24%	9%	15%	22%	-%	24%	-%	9%	10%	12%
Have not Contacted / Not Applicable (DO NOT READ OUT)	*	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	19	2	5	-	*	*	2	4	2	1	1	*	2	16
	9%	25%	17%	-%	4%	1%	5%	11%	11%	12%	5%	8%	23%	9%
NET: Satisfied	61	*	4	2	4	8	13	15	2	7	2	3	1	55
	30%	2%	16%	14%	38%	48%	35%	44%	11%	61%	18%	41%	17%	31%
NET: Dissatisfied	72	5	12	4	4	3	11	9	11	3	7	1	2	62
	36%	74%	44%	27%	41%	18%	30%	28%	49%	25%	63%	19%	31%	35%

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months excluding have not contacted / not applicable

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	209	143	35	12	11	8	66	157	52	192	17	93	41	27	48
Weighted total	203	192	6	2	2	1	11	151	52	196	7	112	39	22	31
Very Dissatisfied	32	30	1	*	*	*	2	20	12	32	*	8	7	9	8
	16%	16%	16%	12%	15%	13%	15%	14%	22%	16%	4%	7%	18%	41%	27% a
Fairly Dissatisfied	40	38	1	1	*	*	3	30	11	39	2	23	3	5	9
	20%	20%	21%	34%	23%	23%	24%	20%	20%	20%	24%	20%	9%	25%	28% b
Neither Satisfied Nor Dissatisfied	51	49	2	*	*	*	2	42	10	49	2	31	8	5	7
	25%	26%	28%	5%	15%	17%	20%	28%	18%	25%	32%	28%	22%	21%	23%
Fairly Satisfied	38	36	*	1	1	1	2	28	10	36	2	22	12	3	2
	19%	19%	7%	33%	27%	46%	20%	19%	19%	18%	34%	19%	31% d	12%	7%
Very Satisfied	22	22	1	-	-	-	1	16	6	22	*	16	3	-	3
	11%	11%	12%	-%	-%	-%	6%	11%	12%	11%	6%	14%	9%	-%	10%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	19	17	1	*	*	-	2	14	5	19	-	13	5	*	1
	9%	9%	16%	16%	20%	-%	15%	9%	9%	10%	-%	11%	12%	2%	4%
NET: Satisfied	61	58	1	1	1	1	3	45	16	58	3	37	15	3	5
	30%	30%	19%	33%	27%	46%	26%	30%	30%	30%	41%	34%	39% d	12%	18%
NET: Dissatisfied	72	68	2	1	1	*	4	50	22	70	2	30	10	14	17
	36%	35%	37%	46%	38%	36%	39%	33%	42%	36%	28%	27%	27%	66%	56% ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

Table 56 (continuation)
Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	a	b
Unweighted total	209	51	39	22	40	25	26	6	146	16	18	13	16	59	23	42	40
Weighted total	203	67	46	23	37	19	8	3	151	15	10	10	16	51	26	36	41
Very Dissatisfied	32	13	5	2	6	4	2	*	19	2	2	2	7	10	9	8	11
	16%	20%	11%	8%	15%	19%	30%	5%	13%	12%	25%	19%	40%	20%	34%	22%	26%
Fairly Dissatisfied	40	15	6	2	7	8	1	*	25	4	3	2	6	12	6	7	11
	20%	23%	13%	9%	19%	41%	15%	13%	17%	27%	31%	24%	33%	24%	22%	20%	26%
Neither Satisfied Nor Dissatisfied	51	17	12	5	12	3	1	2	40	4	2	4	1	14	2	6	10
	25%	26%	27%	20%	31%	14%	10%	78%	27%	25%	22%	37%	7%	28%	8%	17%	25%
Fairly Satisfied	38	12	7	9	9	*	1	*	34	2	2	*	*	6	5	7	5
	19%	18%	16%	37%	23%	1%	16%	4%	23%	13%	18%	1%	2%	13%	21%	19%	12%
Very Satisfied	22	6	9	1	4	2	1	-	14	3	*	2	3	5	2	3	4
	11%	9%	19%	3%	10%	11%	17%	-9%	9%	20%	5%	17%	19%	11%	7%	9%	10%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	19	2	7	5	1	3	1	-	18	*	-	*	-	3	2	5	*
	9%	3%	15%	23%	2%	13%	12%	-9%	12%	3%	-%	2%	-%	5%	8%	13%	*%
			d													b	
NET: Satisfied	61	18	16	9	12	2	3	*	48	5	2	2	3	12	7	10	9
	30%	28%	35%	40%	33%	11%	32%	4%	32%	33%	23%	19%	20%	23%	28%	28%	22%
NET: Dissatisfied	72	29	11	4	13	12	4	*	44	6	5	4	12	22	14	15	21
	36%	43%	24%	17%	34%	61%	45%	18%	29%	39%	55%	42%	73%	44%	56%	42%	53%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 56 (continuation)

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	209	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	203	63	55	90	196	148	199	141	79	171	131	197	54	163	165
		72	45	85	186	133	188	129	58	159	125	188	37	153	151
Very Dissatisfied	32	10	8	14	24	19	24	23	11	21	24	25	5	19	19
	16%	14%	18%	16%	13%	14%	13%	18%	19%	13%	19%	13%	14%	12%	13%
Fairly Dissatisfied	40	16	8	16	38	23	38	26	11	29	23	40	11	33	35
	20%	22%	18%	19%	20%	17%	20%	20%	20%	18%	19%	21%	30%	21%	23%
Neither Satisfied Nor Dissatisfied	51	17	8	27	48	36	49	27	16	42	28	48	8	42	37
	25%	23%	17%	32%	26%	27%	26%	21%	28%	26%	22%	26%	21%	28%	25%
Fairly Satisfied	38	9	18	10	37	28	38	31	8	30	29	37	5	30	26
	19%	12%	41%	12%	20%	21%	20%	24%	14%	19%	23%	19%	15%	19%	17%
			ac												
Very Satisfied	22	12	2	8	21	14	21	15	8	18	12	21	4	15	18
	11%	17%	5%	10%	11%	10%	11%	12%	14%	12%	10%	11%	12%	10%	12%
		b													
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	19	8	1	10	19	14	19	7	3	18	8	18	3	15	16
	9%	11%	2%	12%	10%	11%	10%	5%	5%	12%	7%	10%	8%	10%	11%
		b		b						d					
NET: Satisfied	61	21	20	18	57	42	59	46	16	48	41	57	10	45	44
	30%	29%	46%	21%	31%	31%	31%	36%	28%	30%	33%	30%	27%	29%	29%
			c												
NET: Dissatisfied	72	26	16	30	61	42	61	49	23	50	48	64	16	51	54
	36%	36%	36%	35%	33%	31%	33%	38%	39%	32%	38%	34%	44%	33%	36%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	209	51	5	154	203	193	205	178	207	-	146	206	70	36	39	134
Weighted total	203	44	5	155	193	181	196	172	199	-	140	199	55	35	38	130
Very Dissatisfied	32	8	-	24	30	32	32	29	32	-	27	32	11	10	9	13
	16%	18%	-%	16%	15%	18%	16%	17%	16%	-%	19%	16%	21%	27%	24%	10%
														c		
Fairly Dissatisfied	40	11	1	28	40	36	40	34	40	-	24	40	13	7	5	28
	20%	25%	24%	18%	21%	20%	21%	20%	20%	-%	17%	20%	24%	20%	14%	22%
Neither Satisfied Nor Dissatisfied	51	14	-	37	49	47	49	46	49	-	37	51	10	5	10	36
	25%	33%	-%	24%	25%	26%	25%	27%	25%	-%	27%	26%	18%	14%	26%	28%
Fairly Satisfied	38	5	2	31	36	32	36	29	37	-	22	36	11	8	12	19
	19%	12%	43%	20%	19%	18%	19%	17%	18%	-%	16%	16%	20%	22%	31%	14%
														c		
Very Satisfied	22	1	1	21	21	17	21	19	22	-	18	21	9	6	*	16
	11%	3%	24%	14%	11%	9%	11%	11%	11%	-%	13%	10%	16%	17%	13%	13%
				a										b		b
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	19	4	*	14	17	17	17	15	19	-	13	19	1	-	2	17
	9%	9%	9%	9%	9%	9%	9%	9%	9%	-%	9%	9%	1%	-%	5%	13%
											c	c			a	
NET: Satisfied	61	7	4	52	57	49	57	47	59	-	40	57	20	14	12	35
	30%	16%	67%	33%	29%	27%	29%	28%	30%	-%	28%	29%	36%	39%	31%	27%
				a												
NET: Dissatisfied	72	19	1	52	70	68	72	64	72	-	51	72	25	17	14	41
	36%	43%	24%	34%	36%	37%	37%	37%	36%	-%	36%	36%	45%	47%	37%	32%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied.)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	209	50	27	132	157	52	201	8	81	54	208	1	69	5
Weighted total	203	50	27	126	153	50	196	7	73	50	203	*	66	5
Very Dissatisfied	32	9	9	13	23	9	31	1	4	16	32	-	15	2
	16%	16%	35%	11%	15%	19%	16%	13%	6%	32% a	16%	-%	23%	39%
Fairly Dissatisfied	40	12	8	20	30	11	36	5	8	11	40	-	18	-
	20%	24%	30%	16%	19%	21%	18%	66%	11%	21%	20%	-%	27%	-%
Neither Satisfied Nor Dissatisfied	51	12	3	36	41	11	51	*	21	10	51	-	15	*
	25%	25%	10%	29%	27%	21%	26%	7%	28%	20%	25%	-%	23%	5%
Fairly Satisfied	38	7	4	27	33	6	38	*	17	9	38	-	11	*
	19%	15%	16%	21%	21%	11%	19%	7%	23%	19%	19%	-%	17%	10%
Very Satisfied	22	7	3	13	16	7	22	-	12	2	22	-	4	-
	11%	13%	10%	10%	10%	13%	11%	-%	16% b	5%	11%	-%	6%	-%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	19	2	-	16	12	7	18	*	12	2	19	*	2	2
	9%	5%	-%	13%	8%	13%	9%	7%	16% b	3%	9%	100%	3%	46%
NET: Satisfied	61	14	7	40	49	12	60	*	29	12	61	-	15	*
	30%	28%	25%	32%	32%	25%	31%	7%	39%	23%	30%	-%	23%	10%
NET: Dissatisfied	72	21	18	33	52	20	67	6	12	27	72	-	33	2
	36%	43% c	65%	26%	34%	41%	34%	80%	17%	53% a	36%	-%	50%	39%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Professionalism and handling of any query / complaint (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	209	76	51	37	45
Weighted total	203	66	56	31	51
Very Dissatisfied	32	10	8	3	11
	16%	15%	14%	9%	22%
Fairly Dissatisfied	40	14	4	7	15
	20%	21%	7%	24%	29%
		b		b	b
Neither Satisfied Nor Dissatisfied	51	14	16	9	12
	25%	22%	30%	28%	23%
Fairly Satisfied	38	11	11	7	9
	19%	17%	19%	24%	19%
Very Satisfied	22	7	10	2	3
	11%	10%	18%	8%	6%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-
	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	19	10	6	2	*
	9%	16%	11%	7%	1%
		d			
NET: Satisfied	61	18	21	10	13
	30%	27%	38%	31%	25%
NET: Dissatisfied	72	24	12	10	26
	36%	36%	22%	33%	52%
					b

Columns Tested: a,b,c,d

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Table 57
Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)
Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m
Unweighted total	211	6	17	13	16	17	23	25	13	11	28	20	22	141
Weighted total	207	9	27	15	11	17	36	33	24	11	11	6	7	183
Very Dissatisfied	56	5	9	4	6	4	5	7	8	1	3	1	1	51
	27%	59%	34%	27%	53%	25%	15%	22%	35%	14%	28%	19%	19%	28%
Fairly Dissatisfied	33	-	5	2	*	3	7	6	2	3	4	1	1	27
	16%	-%	18%	12%	2%	16%	20%	17%	9%	24%	37%	17%	17%	15%
Neither Satisfied Nor Dissatisfied	36	-	2	2	2	2	8	7	6	3	1	2	2	31
	17%	-%	8%	12%	17%	10%	21%	22%	27%	25%	12%	28%	23%	17%
Fairly Satisfied	39	2	6	-	1	8	11	6	2	*	1	1	*	36
	19%	21%	23%	-%	14%	47%	30%	17%	9%	2%	13%	9%	7%	20%
Very Satisfied	18	-	-	4	1	*	4	4	*	3	*	1	1	15
	9%	-%	-%	26%	12%	1%	10%	11%	1%	24%	4%	19%	10%	8%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	24	2	5	4	*	*	2	4	5	1	1	*	2	22
	12%	20%	17%	24%	2%	1%	5%	11%	19%	12%	5%	8%	24%	12%
NET: Satisfied	56	2	6	4	3	8	14	9	2	3	2	2	1	52
	27%	21%	23%	26%	26%	48%	40%	27%	10%	25%	18%	28%	17%	28%
NET: Dissatisfied	90	5	14	6	6	7	13	13	11	4	7	2	2	78
	43%	59%	52%	39%	55%	40%	35%	39%	44%	37%	65%	36%	36%	43%

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	211	145	35	12	11	8	66	157	54	194	17	95	41	27	48
Weighted total	207	196	6	2	2	1	11	151	56	200	7	116	39	22	31
Very Dissatisfied	56	54	1	1	*	*	3	40	17	55	2	20	10	10	16
	27%	27%	27%	37%	15%	26%	27%	27%	29%	27%	26%	18%	26%	45%	53%
															ab
Fairly Dissatisfied	33	32	1	*	*	*	2	27	6	33	*	20	5	3	5
	16%	16%	15%	12%	23%	27%	17%	18%	11%	17%	6%	17%	13%	15%	17%
Neither Satisfied Nor Dissatisfied	36	34	1	*	*	*	2	25	11	34	2	20	9	4	3
	17%	17%	26%	20%	25%	13%	23%	17%	19%	17%	31%	17%	23%	19%	9%
Fairly Satisfied	39	38	*	-	1	*	1	29	10	37	2	25	8	4	2
	19%	19%	3%	-	27%	10%	7%	19%	17%	18%	28%	22%	22%	17%	5%
		bf										d	d		
Very Satisfied	18	17	1	*	-	*	1	12	6	17	1	12	2	*	4
	9%	8%	12%	16%	-	23%	12%	8%	11%	9%	8%	10%	4%	2%	12%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	24	23	1	*	*	-	2	17	7	24	-	18	5	*	1
	12%	12%	18%	16%	10%	-	14%	12%	13%	12%	-	16%	12%	2%	3%
												d			
NET: Satisfied	56	54	1	*	1	*	2	41	16	54	3	37	10	4	5
	27%	28%	15%	16%	27%	33%	19%	27%	28%	27%	37%	32%	26%	19%	18%
NET: Dissatisfied	90	85	2	1	1	1	5	67	23	88	2	40	15	13	21
	43%	43%	42%	49%	38%	54%	44%	45%	40%	44%	33%	35%	39%	60%	70%
															ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	a	b
Unweighted total	211	53	39	22	40	25	26	6	148	16	18	13	16	59	23	42	40
Weighted total	207	70	46	23	37	19	8	3	155	15	10	10	16	51	26	36	41
Very Dissatisfied	56	24	7	4	7	11	3	*	34	6	5	2	10	20	12	14	18
	27%	34%	14%	16%	20%	59%	38%	5%	22%	38%	47%	21%	58%	39%	45%	38%	45%
		b															
Fairly Dissatisfied	33	12	8	5	7	*	2	*	26	2	2	*	3	8	7	5	10
	16%	16%	17%	20%	19%	2%	20%	13%	17%	12%	22%	4%	20%	15%	27%	14%	24%
Neither Satisfied Nor Dissatisfied	36	10	8	3	11	3	*	*	30	*	2	4	*	12	2	9	6
	17%	15%	17%	14%	30%	14%	5%	8%	19%	2%	23%	36%	2%	24%	7%	24%	14%
Fairly Satisfied	39	12	9	5	9	2	2	-	30	3	*	2	3	6	1	4	3
	19%	17%	20%	21%	23%	9%	23%	-%	19%	21%	2%	19%	20%	11%	5%	11%	8%
Very Satisfied	18	4	7	1	2	*	*	2	12	4	1	2	-	1	2	*	2
	9%	6%	16%	5%	6%	2%	4%	73%	8%	23%	6%	17%	-%	2%	7%	1%	6%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	24	8	7	5	1	3	1	-	24	*	-	*	*	4	2	5	2
	12%	11%	15%	23%	2%	13%	10%	-%	15%	3%	-%	2%	1%	9%	8%	13%	5%
		d															
NET: Satisfied	56	17	17	6	11	2	2	2	42	7	1	4	3	6	3	4	5
	27%	23%	36%	26%	29%	11%	27%	73%	27%	44%	8%	36%	20%	13%	12%	12%	13%
NET: Dissatisfied	90	36	15	8	14	12	5	*	60	8	7	3	13	28	18	18	28
	43%	51%	32%	36%	38%	61%	58%	18%	39%	51%	69%	26%	78%	55%	72%	52%	68%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%														
Unweighted total	211	a	b	c	a	b	c	d	e	f	a	b	a	b
Weighted total	207	65	55	90	198	148	201	141	79	173	131	54	165	166
Very Dissatisfied	56	21	14	21	46	34	46	44	15	35	43	11	41	37
27%	28%	32%	25%	24%	26%	24%	34%	25%	22%	35%	25%	30%	26%	24%
							acf							
Fairly Dissatisfied	33	10	8	16	33	21	33	18	9	29	20	11	30	26
16%	13%	18%	18%	17%	16%	17%	14%	16%	18%	16%	17%	29%	19%	17%
												ab		
Neither Satisfied Nor Dissatisfied	36	8	8	20	34	26	34	21	14	32	18	4	29	28
17%	10%	19%	23%	18%	20%	18%	16%	24%	19%	15%	18%	11%	19%	18%
			a											
Fairly Satisfied	39	18	11	9	36	22	38	23	11	29	20	6	25	29
19%	23%	24%	10%	19%	17%	20%	18%	18%	18%	16%	19%	17%	16%	19%
		c	c											
Very Satisfied	18	7	3	8	16	11	16	14	7	15	12	2	12	13
9%	10%	6%	9%	8%	8%	8%	11%	12%	9%	9%	8%	5%	8%	8%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	24	12	1	12	24	18	24	8	3	22	12	3	21	20
12%	16%	1%	14%	13%	13%	13%	7%	5%	14%	10%	13%	8%	13%	13%
		b	b	b		e			de					
NET: Satisfied	56	25	13	17	52	33	54	37	17	44	32	8	37	42
27%	33%	30%	20%	28%	25%	28%	29%	30%	27%	26%	27%	21%	24%	27%
NET: Dissatisfied	90	31	22	37	79	56	79	62	24	64	63	22	70	63
43%	41%	50%	43%	41%	42%	41%	48%	41%	40%	50%	42%	60%	45%	41%
												b		

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked, or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	211	51	5	156	204	193	206	179	209	-	146	207	70	36	39	136
Weighted total	207	44	5	159	195	181	197	174	203	-	140	201	55	35	38	134
Very Dissatisfied	56	12	1	43	54	54	56	52	56	-	45	56	21	14	12	30
	27%	28%	24%	27%	28%	30%	29%	30%	28%	-%	32%	28%	37%	39%	32%	23%
Fairly Dissatisfied	33	6	-	27	33	29	33	24	31	-	21	33	11	7	4	22
	16%	15%	-%	17%	17%	16%	17%	14%	15%	-%	15%	17%	20%	20%	10%	17%
Neither Satisfied Nor Dissatisfied	36	9	*	27	34	34	34	33	36	-	19	36	5	4	3	29
	17%	20%	9%	17%	18%	19%	17%	19%	18%	-%	14%	18%	9%	12%	8%	22%
Fairly Satisfied	39	12	3	25	34	27	35	30	37	-	22	35	12	8	15	15
	19%	28%	58%	16%	18%	15%	18%	17%	18%	-%	16%	17%	22%	24%	39%	11%
Very Satisfied	18	*	-	18	18	16	18	17	18	-	17	18	6	2	*	16
	9%	1%	-%	11%	9%	9%	9%	9%	9%	-%	12%	9%	11%	4%	1%	12%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	24	4	*	20	21	21	21	18	24	-	16	22	1	*	4	21
	12%	9%	9%	13%	11%	11%	10%	10%	12%	-%	11%	11%	2%	%	9%	16%
NET: Satisfied	56	12	3	42	52	43	53	46	55	-	40	53	18	10	15	31
	27%	28%	58%	27%	27%	24%	27%	27%	27%	-%	28%	26%	33%	28%	40%	23%
NET: Dissatisfied	90	19	1	70	88	83	90	76	88	-	65	90	31	21	16	53
	43%	43%	24%	44%	45%	46%	46%	44%	43%	-%	47%	45%	57%	59%	43%	40%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	211	50	27	134	158	53	203	8	82	55	210	1	69	5
Weighted total	207	50	27	130	155	52	200	7	76	52	207	*	66	5
Very Dissatisfied	56	14	17	26	40	17	53	3	6	22	56	-	28	2
	27%	27%	61%	20%	26%	32%	27%	43%	8%	43%	27%	-%	43%	39%
										a				
Fairly Dissatisfied	33	12	1	20	26	8	31	3	10	10	33	-	14	*
	16%	25%	5%	15%	17%	15%	15%	37%	13%	19%	16%	-%	21%	10%
Neither Satisfied Nor Dissatisfied	36	10	2	24	28	8	36	*	17	9	36	-	14	*
	17%	21%	9%	18%	18%	16%	18%	7%	23%	17%	17%	-%	21%	5%
Fairly Satisfied	39	9	5	24	36	3	39	-	19	7	39	-	4	-
	19%	19%	20%	18%	23%	6%	19%	-%	25%	13%	19%	-%	6%	-%
					b									
Very Satisfied	18	2	1	14	12	5	17	*	9	1	18	-	3	-
	9%	4%	5%	11%	8%	10%	9%	7%	12%	2%	9%	-%	4%	-%
									b					
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	24	2	-	22	14	11	24	*	14	3	24	*	4	2
	12%	5%	-%	17%	9%	21%	12%	7%	19%	6%	12%	100%	6%	46%
				a		a			b					
NET: Satisfied	56	11	7	38	48	8	56	*	28	8	56	-	6	-
	27%	23%	25%	30%	31%	16%	28%	7%	38%	15%	27%	-%	10%	-%
					b				b					
NET: Dissatisfied	90	26	18	46	65	25	84	6	16	32	90	-	42	2
	43%	52%	67%	35%	42%	47%	42%	80%	21%	62%	44%	-%	63%	49%
		c							a					

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 57 (continuation)

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Ability to resolve my query (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	211	76	52	38	45
Weighted total	207	66	58	33	51
Very Dissatisfied	56	13	12	8	24
	27%	19%	21%	25%	47%
					abc
Fairly Dissatisfied	33	15	8	3	8
	16%	22%	13%	9%	16%
Neither Satisfied Nor					
Dissatisfied	36	13	13	8	2
	17%	19%	23%	25%	4%
		d	d	d	
Fairly Satisfied	39	8	11	8	11
	19%	13%	20%	26%	21%
Very Satisfied	18	7	5	3	2
	9%	11%	9%	9%	4%
Have not Contacted / Not					
Applicable (DO NOT READ					
OUT)	-	-	-	-	-
	-%	-%	-%	-%	-%
Don't Know (DO NOT READ					
OUT)	24	10	8	2	4
	12%	15%	14%	7%	8%
NET: Satisfied	56	16	17	11	13
	27%	24%	29%	34%	25%
NET: Dissatisfied	90	27	20	11	32
	43%	41%	34%	34%	63%
					abc

Columns Tested: a,b,c,d

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Table 58

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months excluding have not contacted / not applicable

TOTAL	GOR													
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England	
Significance Level: 95%														
Unweighted total	207	6	17	12	16	16	22	24	13	11	28	22	137	
Weighted total	203	9	27	13	11	16	34	33	24	11	11	6	7	179
Very Dissatisfied	8	2	-	2	*	-	-	2	-	1	*	*	7	
	4%	20%	-%	15%	2%	-%	-%	5%	-%	12%	4%	-%	7%	4%
Fairly Dissatisfied	11	-	5	2	-	-	-	*	2	-	1	*	*	9
	5%	-%	17%	14%	-%	-%	-%	*%	9%	-%	13%	8%	2%	5%
Neither Satisfied Nor Dissatisfied	41	2	5	*	3	3	14	4	4	1	3	1	*	36
	20%	20%	18%	1%	28%	16%	42%	11%	18%	14%	27%	23%	5%	20%
Fairly Satisfied	67	2	8	4	3	8	9	13	11	2	3	1	2	60
	33%	21%	31%	28%	28%	51%	27%	39%	46%	15%	31%	11%	33%	34%
Very Satisfied	52	2	5	4	4	4	9	11	2	5	2	3	2	46
	26%	20%	17%	29%	38%	24%	26%	33%	9%	47%	15%	49%	24%	25%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	25	2	5	2	1	1	2	4	5	1	1	1	2	21
	12%	20%	17%	14%	5%	9%	5%	11%	19%	12%	10%	9%	30%	12%
NET: Satisfied	118	4	13	8	7	12	18	24	13	7	5	4	4	106
	58%	41%	48%	57%	65%	75%	53%	73%	54%	63%	46%	60%	57%	59%
NET: Dissatisfied	19	2	5	4	*	-	-	2	2	1	2	*	1	16
	9%	20%	17%	28%	2%	-%	-%	6%	9%	12%	18%	8%	9%	9%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 58 (continuation)

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months excluding have not contacted / not applicable

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	207	143	33	12	11	8	64	154	53	192	15	92	41	26	48
Weighted total	203	193	5	2	2	1	10	147	56	196	7	112	39	21	31
Very Dissatisfied	8	8	*	-	*	-	*	6	2	8	-	*	4	2	2
	4%	4%	3%	-%	10%	-%	3%	4%	4%	4%	-%	*%	10%	8%	6%
												a			a
Fairly Dissatisfied	11	10	-	-	*	*	1	10	*	11	*	7	1	*	2
	5%	5%	-%	-%	23%	13%	6%	7%	1%	5%	2%	6%	2%	2%	8%
Neither Satisfied Nor Dissatisfied	41	39	1	*	-	*	2	30	11	39	2	20	6	4	10
	20%	20%	21%	16%	-%	41%	18%	20%	19%	20%	28%	18%	17%	21%	32%
Fairly Satisfied	67	63	2	1	1	*	4	48	19	64	2	34	12	11	9
	33%	33%	36%	42%	38%	13%	35%	33%	33%	33%	36%	30%	30%	54%	31%
Very Satisfied	52	50	1	1	*	*	2	35	17	50	2	34	11	1	6
	26%	26%	22%	24%	10%	33%	21%	24%	30%	25%	33%	30%	29%	3%	19%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	25	23	1	*	*	-	2	18	7	25	-	17	5	3	1
	12%	12%	19%	18%	20%	-%	17%	12%	12%	13%	-%	15%	12%	12%	4%
NET: Satisfied	118	113	3	1	1	1	6	83	35	114	5	68	23	12	15
	58%	58%	58%	66%	48%	46%	56%	57%	63%	58%	70%	61%	59%	56%	50%
NET: Dissatisfied	19	18	*	-	1	*	1	16	3	18	*	7	5	2	4
	9%	9%	3%	-%	32%	13%	9%	11%	5%	9%	2%	7%	12%	11%	14%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 58 (continuation)

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	a	b
Unweighted total	207	51	39	21	40	24	26	6	144	16	18	13	16	57	23	42	38
Weighted total	203	67	46	23	37	19	8	3	151	15	10	10	16	49	26	36	38
Very Dissatisfied	8	2	2	-	4	*	-	-	6	2	*	-	-	3	4	3	4
	4%	3%	5%	-%	10%	2%	-%	-%	4%	12%	5%	-%	-%	6%	14%	9%	9%
Fairly Dissatisfied	11	7	2	-	1	-	1	*	8	2	*	*	-	3	2	3	3
	5%	11%	4%	-%	2%	-%	8%	13%	5%	12%	5%	1%	-%	6%	9%	7%	7%
Neither Satisfied Nor Dissatisfied	41	15	9	1	7	7	2	*	27	2	4	2	6	12	4	5	11
	20%	22%	19%	6%	19%	36%	24%	5%	18%	12%	37%	24%	35%	25%	15%	15%	28%
Fairly Satisfied	67	16	14	9	17	6	2	2	47	6	3	6	5	14	5	10	9
	33%	24%	30%	39%	46%	33%	27%	73%	31%	42%	29%	56%	29%	28%	21%	27%	24%
				a													
Very Satisfied	52	19	12	7	8	2	2	*	39	3	2	2	6	13	6	11	8
	26%	29%	27%	32%	22%	13%	26%	8%	26%	20%	23%	17%	36%	26%	23%	30%	21%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	25	8	7	5	*	3	1	-	24	*	*	*	-	4	4	5	4
	12%	12%	15%	23%	1%	16%	15%	-%	16%	3%	2%	2%	-%	8%	17%	13%	10%
			d														
NET: Satisfied	118	35	26	16	26	9	4	2	86	9	5	8	11	26	11	20	17
	58%	52%	57%	71%	69%	46%	53%	82%	57%	62%	52%	73%	65%	54%	45%	57%	46%
NET: Dissatisfied	19	9	4	-	4	*	1	*	14	4	1	*	-	6	6	6	6
	9%	14%	9%	-%	11%	2%	8%	13%	9%	23%	10%	1%	-%	13%	23%	16%	17%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 58 (continuation)

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	207	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	203	66	52	88	194	144	197	138	79	170	129	195	53	161	164
Very Dissatisfied	8	1	7	1	6	6	6	8	6	4	6	6	1	6	6
	4%	1%	16%	1%	3%	5%	3%	6%	11%	3%	5%	3%	2%	4%	4%
			ac						acf						
Fairly Dissatisfied	11	5	3	3	6	3	6	5	1	4	6	6	2	6	4
	5%	6%	7%	4%	3%	3%	3%	4%	2%	3%	5%	3%	6%	4%	3%
Neither Satisfied Nor Dissatisfied	41	13	8	20	37	25	37	26	9	35	25	38	10	32	32
	20%	17%	18%	25%	20%	20%	20%	21%	15%	22%	21%	20%	28%	21%	21%
Fairly Satisfied	67	25	14	26	66	46	66	40	22	53	40	66	10	51	53
	33%	33%	33%	32%	35%	35%	35%	32%	38%	33%	33%	35%	30%	33%	35%
Very Satisfied	52	20	10	22	46	32	47	37	15	41	34	48	8	37	36
	26%	26%	24%	27%	25%	25%	25%	30%	26%	26%	28%	25%	24%	24%	24%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	25	14	1	11	25	17	25	9	5	23	11	25	3	21	21
	12%	18% b	2%	13% b	13%	13%	13%	7%	8%	15% d	9%	13%	10%	14%	14%
NET: Satisfied	118	45	24	48	111	78	114	77	37	94	74	113	19	88	89
	58%	59%	57%	58%	60%	60%	60%	62%	64%	59%	61%	60%	54%	57%	58%
NET: Dissatisfied	19	5	10	4	13	10	13	13	8	8	12	13	3	12	10
	9%	7%	23% ac	4%	7%	7%	7%	11%	13% f	5%	10%	7%	8%	8%	7%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 58 (continuation)

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	207	51	5	152	200	188	202	174	205	-	141	203	69	36	36	135
Weighted total	203	44	5	155	191	177	193	169	199	-	135	197	53	35	34	134
Very Dissatisfied	8	3	-	5	8	8	8	8	8	-	8	8	2	*	3	5
	4%	6%	-%	3%	4%	5%	4%	5%	4%	-%	6%	4%	5%	1%	8%	4%
Fairly Dissatisfied	11	1	-	10	9	8	11	10	11	-	8	11	5	3	*	7
	5%	2%	-%	6%	4%	5%	6%	6%	5%	-%	6%	5%	9%	8%	1%	6%
Neither Satisfied Nor Dissatisfied	41	9	1	30	39	38	39	37	41	-	27	41	13	9	10	22
	20%	21%	24%	20%	20%	21%	20%	22%	21%	-%	20%	21%	24%	26%	29%	16%
Fairly Satisfied	67	20	2	45	64	58	64	55	65	-	40	64	13	6	13	47
	33%	45%	34%	29%	34%	33%	33%	33%	33%	-%	30%	33%	25%	18%	38%	35%
Very Satisfied	52	5	2	46	50	44	50	41	50	-	37	50	19	16	4	32
	26%	12%	33%	30%	26%	25%	26%	24%	25%	-%	27%	25%	36%	47%	11%	24%
				a										bc		
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	25	6	*	19	21	21	21	18	25	-	16	23	1	*	4	21
	12%	13%	9%	12%	11%	12%	11%	11%	13%	-%	12%	12%	1%	1%	12%	15%
											c	c		a	a	a
NET: Satisfied	118	25	4	91	114	102	115	96	115	-	77	114	33	23	17	79
	58%	57%	67%	59%	60%	58%	59%	57%	58%	-%	57%	58%	61%	65%	49%	59%
NET: Dissatisfied	19	4	-	15	16	16	19	18	19	-	16	19	7	3	3	12
	9%	9%	-%	10%	9%	9%	10%	11%	9%	-%	12%	9%	14%	8%	9%	9%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 58 (continuation)

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	b	a	*b	a	*b
Unweighted total	207	50	27	130	154	53	199	8	82	53	206	1	67	5
Weighted total	203	50	27	126	153	50	196	7	76	49	203	*	63	5
Very Dissatisfied	8	4	1	4	6	1	8	-	2	5	8	-	5	2
	4%	7%	2%	3%	4%	3%	4%	-%	2%	11%	4%	-%	8%	39%
										a				
Fairly Dissatisfied	11	5	1	5	6	5	8	3	-	9	11	-	5	-
	5%	9%	3%	4%	4%	10%	4%	43%	-%	19%	5%	-%	8%	-%
										a				
Neither Satisfied Nor Dissatisfied	41	8	11	22	31	10	40	*	8	9	41	-	14	-
	20%	16%	42%	17%	20%	19%	21%	7%	11%	18%	20%	-%	22%	-%
Fairly Satisfied	67	18	7	41	58	9	64	3	25	17	67	-	18	*
	33%	36%	26%	33%	38%	18%	33%	37%	33%	35%	33%	-%	29%	3%
					b									
Very Satisfied	52	13	7	31	36	16	51	*	26	5	52	-	15	1
	26%	27%	26%	25%	23%	32%	26%	7%	35%	9%	26%	-%	23%	13%
									b					
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	25	2	-	23	16	9	25	*	14	4	25	*	6	2
	12%	5%	-%	18%	10%	18%	13%	7%	19%	8%	12%	100%	9%	46%
				a										
NET: Satisfied	118	32	14	73	93	25	115	3	51	22	118	-	33	1
	58%	63%	53%	58%	61%	50%	59%	43%	68%	44%	58%	-%	52%	16%
									b					
NET: Dissatisfied	19	8	2	9	12	7	16	3	2	15	19	-	10	2
	9%	16%	6%	7%	8%	13%	8%	43%	2%	30%	9%	-%	16%	39%
									a					

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 58 (continuation)

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The staff being polite and courteous (QRM5. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects using a 5 point scale where 1 is very dissatisfied and 5 is very satisfied:)

Base: All respondents who have experienced a problem with their service from Royal Mail in the last 6 months excluding have not contacted / not applicable

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	207	74	52	37	44
Weighted total	203	65	58	31	49
Very Dissatisfied	8	2	2	*	4
	4%	3%	3%	1%	8%
Fairly Dissatisfied	11	2	-	2	7
	5%	3%	-%	7%	13%
					ab
Neither Satisfied Nor Dissatisfied	41	10	9	9	13
	20%	15%	15%	29%	28%
Fairly Satisfied	67	21	22	9	15
	33%	32%	37%	29%	30%
Very Satisfied	52	20	16	6	10
	26%	31%	27%	21%	19%
Have not Contacted / Not Applicable (DO NOT READ OUT)	-	-	-	-	-
	-%	-%	-%	-%	-%
Don't Know (DO NOT READ OUT)	25	11	10	4	*
	12%	16%	18%	13%	1%
		d	d	d	
NET: Satisfied	118	42	37	15	24
	58%	63%	64%	50%	50%
NET: Dissatisfied	19	4	2	2	11
	9%	6%	3%	8%	22%
					ab

Columns Tested: a,b,c,d

Table 59

QRM5. SUMMARY. Thinking about contacting Royal Mail with a service query, request or complaint, and your experiences in the last six months, please rate Royal Mail on the following aspects ...

Base: All respondents who have experienced a problem with their service from Royal Main in the last 6 months excluding have not contacted / not applicable

	Aspects		
	Professionalism and handling of any query / complaint	Ability to resolve my query	The staff being polite and courteous
Significance Level: 95%	a	b	c
Unweighted total	209	211	207
Weighted total	203	207	203
Very Dissatisfied	32 16% c	56 27% ac	8 4%
Fairly Dissatisfied	40 20% c	33 16% c	11 5%
Neither Satisfied Nor Dissatisfied	51 25%	36 17%	41 20%
Fairly Satisfied	38 19%	39 19%	67 33% ab
Very Satisfied	22 11%	18 9%	52 26% ab
Have not Contacted / Not Applicable (DO NOT READ OUT)	- -%	- -%	- -%
Don't Know (DO NOT READ OUT)	19 9%	24 12%	25 12%
NET: Satisfied	61 30%	56 27%	118 58% ab
NET: Dissatisfied	72 36% c	90 43% c	19 9%
Columns Tested: a,b,c			

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Table 60

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The quality of the mail services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	764	35	48	39	52	55	86	52	62	35	103	105	92	464
Weighted total	783	53	84	63	53	58	116	82	112	37	43	45	37	657
Very low	5 1%	- -%	* *%	* *%	- -%	- -%	2 2%	2 2%	- -%	- -%	- -%	* 1%	- -%	4 1%
Quite low	29 4%	2 3%	4 5%	2 3%	1 2%	3 4%	2 2%	4 4%	6 6%	* 1%	2 4%	1 3%	2 5%	24 4%
Neither low nor high	143 18%	11 21%	11 13%	16 25%	12 23%	14 23%	28 24%	13 16%	14 13%	7 18%	5 12%	7 16%	5 13%	126 19%
Quite high	368 47%	20 38%	32 38%	30 48%	25 47%	28 49%	55 47%	42 51%	56 51%	24 66%	20 47%	18 40%	17 44%	312 48%
Very high	237 30%	20 38%	37 44%	13 20%	15 28%	14 23%	30 25%	22 27%	35 31%	6 15%	16 36%	18 39%	14 37%	189 29%
Don't Know (DO NOT READ OUT)	2 *%	- -%	- -%	2 3%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	2 *%
NET: High	604 77%	40 76%	68 82%	43 68%	39 74%	42 72%	84 73%	63 78%	91 82%	30 81%	36 84%	36 79%	30 81%	502 76%
NET: Low	34 4%	2 3%	5 5%	2 3%	1 2%	3 4%	4 3%	5 7%	6 6%	* 1%	2 4%	2 4%	2 5%	28 4%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 60 (continuation)

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The quality of the mail services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	764	620	80	22	16	26	144	489	275	699	65	519	131	45	69
Weighted total	783	758	14	4	3	4	24	542	241	750	33	573	124	37	48
Very low	5	4	*	-	-	*	1	4	*	5	*	-	*	*	4
	1%	1%	3%	-%	-%	4%	3%	1%	1%	1%	1%	-%	1%	1%	8%
			a				a							a	ab
Quite low	29	29	-	-	*	*	*	21	8	29	*	17	5	1	5
	4%	4%	-%	-%	7%	3%	1%	4%	3%	4%	1%	3%	4%	3%	11%
															a
Neither low nor high	143	137	4	1	1	1	6	106	37	135	8	92	24	10	16
	18%	18%	26%	31%	20%	26%	26%	20%	15%	18%	25%	16%	20%	26%	34%
							a								ab
Quite high	368	357	7	2	1	1	10	255	112	358	10	283	52	15	17
	47%	47%	49%	43%	46%	19%	43%	47%	47%	48%	30%	49%	42%	40%	35%
										b		d			
Very high	237	230	3	1	1	2	7	153	84	222	15	179	41	11	6
	30%	30%	21%	26%	28%	49%	27%	28%	35%	30%	45%	31%	33%	30%	12%
										a		d	d	d	
Don't Know (DO NOT READ OUT)	2	2	-	-	-	-	-	2	-	2	-	2	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	1%	-%	-%	-%
NET: High	604	587	9	3	2	3	17	408	196	580	25	462	93	26	22
	77%	77%	70%	69%	73%	68%	70%	75%	81%	77%	75%	81%	75%	70%	47%
												d	d	d	
NET: Low	34	33	*	-	*	*	1	25	8	33	*	17	6	1	9
	4%	4%	3%	-%	7%	6%	4%	5%	3%	4%	1%	3%	5%	3%	19%
															abc

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 60 (continuation)

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The quality of the mail services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	*f	*g	a	b	*c	*d	*e	a	b	a	b
Unweighted total	764	369	115	97	103	51	27	2	671	31	23	22	17	107	53	67	93
Weighted total	783	422	117	105	96	35	8	*	711	28	16	19	9	105	60	64	102
Very low	5	2	-	-	2	*	*	*	1	2	-	2	*	3	2	2	3
	1%	1%	-%	-%	2%	*%	4%	50%	*%	6%	-%	9%	2%	2%	3%	3%	3%
										a							
Quite low	29	12	6	2	4	4	*	-	23	4	*	-	1	2	4	1	5
	4%	3%	5%	2%	5%	13%	2%	-%	3%	15%	3%	-%	15%	2%	6%	2%	5%
						ac				a							
Neither low nor high	143	76	22	14	22	8	1	*	128	3	5	6	1	22	15	15	22
	18%	18%	19%	13%	23%	24%	19%	50%	18%	11%	35%	30%	11%	21%	26%	24%	22%
Quite high	368	188	62	58	41	16	3	-	341	7	6	10	4	51	25	28	47
	47%	45%	53%	55%	42%	46%	33%	-%	48%	23%	41%	51%	51%	49%	41%	45%	47%
									b								
Very high	237	142	27	32	27	6	3	-	217	13	3	2	2	28	14	17	25
	30%	34%	23%	30%	29%	17%	41%	-%	30%	45%	21%	10%	22%	26%	24%	27%	24%
		be															
Don't Know (DO NOT READ OUT)	2	2	-	-	-	-	-	-	2	-	-	-	-	-	-	-	-
	*%	*%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%
NET: High	604	330	89	90	68	22	6	-	557	19	10	12	6	79	39	46	72
	77%	78%	76%	85%	71%	63%	74%	-%	78%	68%	62%	61%	73%	75%	65%	72%	71%
		e		de													
NET: Low	34	14	6	2	6	5	1	*	24	6	*	2	1	5	6	3	8
	4%	3%	5%	2%	6%	13%	7%	50%	3%	21%	3%	9%	17%	5%	9%	4%	7%
						ac				a							

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 60 (continuation)

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The quality of the mail services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	764	374	131	694	418	707	330	166	581	312	697	127	561	488
Weighted total	783	396	134	705	407	724	331	127	596	311	709	107	573	487
Very low	5	*	2	3	1	3	4	1	3	4	3	*	3	3
1%	1%	%	2%	1%	%	%	1%	1%	%	1%	%	%	%	1%
		a												
Quite low	29	11	7	26	18	26	11	4	16	13	26	5	20	17
4%	3%	5%	4%	4%	5%	4%	3%	3%	3%	4%	4%	5%	4%	4%
Neither low nor high	143	66	38	129	90	131	76	29	108	72	127	26	110	99
16%	17%	28%	16%	18%	22%	18%	23%	23%	18%	23%	18%	24%	19%	20%
		ac												
Quite high	368	183	61	329	188	343	153	61	291	138	341	45	276	238
47%	46%	46%	48%	47%	46%	47%	46%	48%	49%	44%	48%	42%	48%	49%
Very high	237	133	25	216	110	220	87	32	176	84	210	31	162	130
30%	34%	19%	31%	31%	27%	30%	26%	25%	30%	27%	30%	29%	28%	27%
		b	b											
Don't Know (DO NOT READ OUT)	2	2	-	2	-	2	-	-	2	-	2	-	2	-
*%	%	-%	-%	%	-%	%	-%	-%	%	-%	%	-%	%	-%
NET: High	604	316	86	546	297	563	240	93	467	222	551	75	438	368
77%	80%	65%	79%	77%	73%	78%	72%	73%	78%	71%	78%	70%	76%	75%
		b	b						d		a			
NET: Low	34	12	9	29	19	29	15	5	19	18	29	5	23	20
4%	3%	7%	5%	4%	5%	4%	5%	4%	3%	6%	4%	5%	4%	4%
		a												

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 60 (continuation)

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The quality of the mail services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	764	109	14	646	751	644	754	578	759	-	418	751	174	76	114	573
Weighted total	783	110	14	664	766	650	769	587	777	-	424	771	168	67	120	594
Very low	5	-	-	5	5	5	5	5	5	-	4	5	2	*	*	4
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
Quite low	29	5	-	25	29	23	29	26	29	-	14	29	7	*	6	23
	4%	4%	-%	4%	4%	4%	4%	4%	4%	-%	3%	4%	4%	1%	5%	4%
Neither low nor high	143	30	3	110	138	122	141	107	141	-	83	143	33	14	33	96
	18%	28% c	23%	17%	18%	19%	18%	18%	18%	-%	20%	19%	20%	20%	28% c	16%
Quite high	368	59	4	307	362	315	363	270	364	-	199	364	76	26	58	284
	47%	53%	31%	46%	47%	49%	47%	46%	47%	-%	47%	47%	45%	38%	49%	48%
Very high	237	16	6	216	230	186	230	179	236	-	125	228	49	27	21	187
	30%	15%	46%	33% a	30%	29%	30%	30%	30%	-%	29%	30%	29%	40% b	17%	31% b
Don't Know (DO NOT READ OUT)	2	-	-	2	2	-	2	-	2	-	-	2	-	-	2	-
	*%	-%	-%	*%	*%	-%	*%	-%	*%	-%	-%	*%	-%	-%	1% c	-%
NET: High	604	75	10	523	592	501	593	449	600	-	323	593	125	53	79	470
	77%	68%	77%	79% a	77%	77%	77%	77%	77%	-%	76%	77%	75%	78%	66%	79% b
NET: Low	34	5	-	29	34	28	34	31	34	-	18	34	10	1	6	27
		4%	-%	4%	4%	4%	4%	5%	4%	-%	4%	4%	6%	1%	5%	5%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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The quality of the mail services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)
Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	764	81	38	634	481	283	701	531	49	174	590	146	2
Weighted total	783	88	46	640	485	298	722	536	56	181	602	151	1
Very low	5	2	2	*	3	2	4	2	2	5	-	3	-
	1%	2%	5%	1%	1%	1%	1%	1%	4%	3%	-%	2%	-%
	c	c							a	b			
Quite low	29	7	4	18	15	14	25	3	17	23	6	5	-
	4%	8%	8%	3%	3%	5%	3%	1%	31%	13%	1%	4%	-%
	c								a	b			
Neither low nor high	143	18	14	111	102	41	137	25	25	57	86	34	*
	18%	20%	30%	17%	21%	14%	19%	5%	44%	32%	14%	22%	19%
				b	b			a	a	b			
Quite high	368	38	12	313	221	147	337	279	7	83	285	71	*
	47%	44%	25%	49%	46%	49%	47%	52%	12%	46%	47%	47%	81%
				b				b					
Very high	237	23	14	195	144	93	218	226	5	13	224	38	-
	30%	26%	31%	31%	30%	31%	30%	42%	9%	7%	37%	25%	-%
								b		a			
Don't Know (DO NOT READ OUT)	2	-	-	2	-	2	-	2	-	-	2	-	-
	1%	0%	0%	1%	0%	1%	0%	1%	0%	0%	1%	0%	0%
							a						
NET: High	604	61	26	508	364	240	556	505	11	96	508	109	*
	77%	70%	56%	79%	75%	80%	77%	94%	20%	53%	84%	72%	81%
				ab				b		a			
NET: Low	34	9	6	19	18	15	29	5	20	28	6	8	-
	4%	10%	14%	3%	4%	5%	4%	1%	35%	16%	1%	5%	-%
	c	c						a		b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

The quality of the mail services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	Quarter	
		Q1 2013	Q2 2013
Significance Level: 95%		a	b
Unweighted total	764	389	375
Weighted total	783	396	387
Very low	5 1%	* *%	4 1%
Quite low	29 4%	12 3%	17 4%
Neither low nor high	143 18%	84 21% b	59 15%
Quite high	368 47%	197 50%	171 44%
Very high	237 30%	100 25%	137 35% a
Don't Know (DO NOT READ OUT)	2 *%	2 *%	- -%
NET: High	604 77%	297 75%	307 79%
NET: Low	34 4%	12 3%	21 5%
Columns Tested: a,b			

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Table 61

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The price of the postal services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	764	35	48	39	52	55	86	52	62	35	103	105	92	464
Weighted total	783	53	84	63	53	58	116	82	112	37	43	45	37	657
Very low	96	7	9	7	7	8	18	11	15	1	3	4	4	84
	12%	14%	11%	12%	14%	13%	16%	13%	13%	4%	8%	9%	11%	13%
Quite low	158	14	11	13	9	12	22	11	29	12	9	8	9	133
	20%	27%	13%	20%	17%	21%	19%	13%	26%	32%	20%	17%	23%	20%
										bg				
Neither low nor high	300	22	34	25	21	19	39	31	42	17	19	17	14	250
	38%	42%	41%	40%	40%	33%	34%	37%	38%	45%	44%	37%	38%	38%
Quite high	172	9	20	14	13	15	31	22	15	5	8	12	7	145
	22%	18%	24%	23%	24%	26%	27%	27%	14%	15%	19%	27%	18%	22%
											h			
Very high	53	-	9	2	1	4	6	7	11	1	3	4	3	42
	7%	-%	11%	3%	3%	7%	5%	9%	10%	4%	8%	9%	9%	6%
			a											
Don't Know (DO NOT READ OUT)	5	-	-	2	1	-	-	-	-	-	*	*	*	3
	1%	-%	-%	3%	2%	-%	-%	-%	-%	-%	1%	1%	1%	1%
NET: High	225	9	29	16	14	19	36	29	26	7	11	16	10	187
	29%	18%	35%	25%	27%	33%	31%	36%	24%	19%	27%	36%	27%	28%
												a		
NET: Low	253	22	20	20	16	20	41	22	43	13	12	12	13	217
	32%	41%	24%	32%	30%	34%	35%	27%	39%	36%	28%	26%	34%	33%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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The price of the postal services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	764	620	80	22	16	26	144	489	275	699	65	519	131	45	69
Weighted total	783	758	14	4	3	4	24	542	241	750	33	573	124	37	48
Very low	96	93	2	-	*	*	3	69	26	95	*	64	11	7	13
	12%	12%	15%	-%	14%	8%	11%	13%	11%	13%	1%	11%	9%	19%	28%
										b					ab
Quite low	158	152	2	2	*	1	6	109	49	150	8	119	23	6	10
	20%	20%	18%	53%	15%	21%	24%	20%	20%	20%	24%	21%	19%	15%	22%
Neither low nor high	300	291	6	1	1	2	9	211	89	287	13	212	56	17	15
	38%	38%	42%	23%	23%	41%	37%	39%	37%	38%	39%	37%	45%	46%	32%
Quite high	172	168	3	1	1	1	4	111	61	161	11	130	29	6	7
	22%	22%	19%	16%	20%	18%	18%	20%	25%	22%	32%	23%	23%	17%	14%
Very high	53	50	1	*	1	*	2	37	15	52	1	45	4	1	2
	7%	7%	6%	8%	28%	12%	9%	7%	6%	7%	2%	8%	4%	3%	5%
Don't Know (DO NOT READ OUT)	5	5	-	-	-	-	-	4	*	4	*	5	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	1%	1%	-%	-%	-%
NET: High	225	218	3	1	1	1	7	148	77	214	11	175	33	8	9
	29%	29%	25%	25%	47%	30%	28%	27%	32%	28%	34%	30%	27%	20%	19%
												d			
NET: Low	253	245	4	2	1	1	9	178	75	245	8	183	34	13	24
	32%	32%	33%	53%	30%	29%	35%	33%	31%	33%	25%	32%	28%	34%	50%
															ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 61 (continuation) Page 530

The price of the postal services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	*f	*g	a	b	*c	*d	*e	a	b	a	b
Unweighted total	764	369	115	97	103	51	27	2	671	31	23	22	17	107	53	67	93
Weighted total	783	422	117	105	96	35	8	*	711	28	16	19	9	105	60	64	102
Very low	96	50	12	12	16	5	1	*	84	3	1	7	1	15	10	11	14
	12%	12%	10%	11%	17%	13%	16%	50%	12%	9%	8%	36%	9%	14%	17%	17%	14%
Quite low	158	83	30	23	12	8	1	-	141	8	3	4	2	18	15	10	24
	20%	20%	26%	22%	13%	23%	15%	-%	20%	28%	21%	22%	20%	17%	26%	15%	23%
			d														
Neither low nor high	300	157	48	34	43	14	3	*	276	8	7	5	4	40	18	27	32
	38%	37%	41%	32%	45%	42%	45%	50%	39%	28%	44%	26%	42%	38%	30%	42%	31%
Quite high	172	95	20	32	17	8	1	-	156	7	4	3	2	23	11	11	22
	22%	22%	17%	30%	18%	22%	12%	-%	22%	26%	24%	15%	24%	22%	18%	18%	22%
			bd														
Very high	53	33	6	5	8	*	1	-	49	3	*	*	*	8	5	5	8
	7%	8%	5%	5%	8%	1%	12%	-%	7%	9%	2%	1%	4%	7%	9%	8%	8%
Don't Know (DO NOT READ OUT)	5	4	*	-	-	-	-	-	5	-	-	-	-	2	-	-	2
	1%	1%	*%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	2%	-%	-%	2%
NET: High	225	128	26	37	25	8	2	-	205	10	4	3	2	31	16	16	30
	29%	30%	22%	35%	26%	23%	24%	-%	29%	35%	26%	15%	28%	29%	27%	26%	30%
			b														
NET: Low	253	133	43	35	28	12	2	*	225	10	5	11	3	32	26	20	38
	32%	32%	36%	33%	29%	36%	31%	50%	32%	37%	30%	58%	29%	31%	43%	32%	37%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 61 (continuation)

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The price of the postal services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	764	374	255	694	418	707	330	166	581	312	697	127	561	488
Weighted total	783	396	249	705	407	724	331	127	596	311	709	107	573	487
Very low	96	44	19	83	47	87	48	21	73	42	84	14	66	56
12%	11%	14%	13%	12%	12%	12%	14%	16%	12%	13%	12%	13%	11%	12%
Quite low	158	80	23	142	90	148	65	25	120	60	147	25	113	123
20%	20%	17%	22%	20%	22%	20%	20%	19%	20%	19%	21%	24%	20%	25%
Neither low nor high	300	135	65	273	166	281	134	51	243	129	278	33	232	190
38%	34%	49%	40%	39%	41%	39%	40%	40%	41%	42%	39%	31%	40%	39%
		a								c				
Quite high	172	98	23	163	81	163	65	24	124	62	155	22	125	98
22%	25%	18%	20%	23%	20%	22%	20%	19%	21%	20%	22%	21%	22%	20%
Very high	53	35	4	42	22	44	20	6	33	18	43	12	35	20
7%	9%	3%	5%	6%	5%	6%	6%	5%	6%	6%	6%	11%	6%	4%
		b										ab		
Don't Know (DO NOT READ OUT)	5	4	-	2	*	2	-	*	2	-	2	-	2	*
1%	1%	-	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
NET: High	225	133	27	205	103	207	84	30	158	80	198	34	161	117
29%	34%	20%	25%	29%	25%	29%	25%	24%	26%	26%	28%	32%	28%	24%
		bc												
NET: Low	253	123	41	225	137	235	113	45	193	102	231	39	179	179
32%	31%	31%	34%	32%	34%	32%	34%	36%	32%	33%	33%	37%	31%	37%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 61 (continuation)

Page 532

The price of the postal services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	764	109	14	646	751	644	754	578	759	-	418	751	174	76	114	573
Weighted total	783	110	14	664	766	650	769	587	777	-	424	771	168	67	120	594
Very low	96	23	-	72	92	74	95	77	93	-	48	95	24	7	28	60
	12%	21%	-%	11%	12%	11%	12%	13%	12%	-%	11%	12%	14%	11%	23%	10%
		c													ac	
Quite low	158	38	4	117	154	129	154	118	155	-	89	156	30	9	33	116
	20%	34%	30%	18%	20%	20%	20%	20%	20%	-%	21%	20%	18%	13%	28%	19%
		c													ac	
Neither low nor high	300	33	5	264	295	262	296	227	300	-	165	298	63	34	40	226
	38%	30%	34%	40%	39%	40%	38%	39%	39%	-%	39%	39%	38%	50%	33%	38%
														bc		
Quite high	172	13	5	156	171	144	171	123	172	-	88	171	34	15	14	142
	22%	11%	37%	24%	22%	22%	22%	21%	22%	-%	21%	22%	20%	22%	12%	24%
				a											b	
Very high	53	3	-	50	49	38	49	40	53	-	31	47	15	3	4	46
	7%	3%	-%	7%	6%	6%	6%	7%	7%	-%	7%	6%	9%	4%	3%	8%
Don't Know (DO NOT READ OUT)	5	-	-	5	5	3	5	3	5	-	2	5	2	-	*	4
	1%	-%	-%	1%	1%	*%	1%	*%	1%	-%	1%	1%	1%	-%	*%	1%
NET: High	225	16	5	206	220	181	220	163	225	-	119	217	49	17	18	188
	29%	14%	37%	31%	29%	28%	29%	28%	29%	-%	28%	28%	29%	26%	15%	32%
				a											b	
NET: Low	253	61	4	189	246	203	250	194	248	-	137	251	54	16	61	176
	32%	56%	30%	28%	32%	31%	32%	33%	32%	-%	32%	33%	32%	24%	51%	30%
		c													ac	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 61 (continuation)

Page 533

The price of the postal services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	81	38	634	481	283	701	63	531	49	174	590	146	2
Weighted total	783	88	46	640	485	298	722	61	536	56	181	602	151
Very low	96	9	7	79	66	30	90	6	25	26	38	58	21
	12%	10%	16%	12%	14%	10%	12%	10%	5%	47%	21%	10%	14%
Quite low	158	22	12	124	104	54	148	10	83	18	57	101	32
	20%	25%	25%	19%	21%	18%	20%	17%	15%	32%	31%	17%	21%
Neither low nor high	300	32	13	250	194	105	280	19	226	6	62	238	53
	38%	37%	29%	39%	40%	35%	39%	32%	42%	11%	34%	40%	35%
Quite high	172	17	12	139	94	78	154	18	145	5	21	151	30
	22%	19%	26%	22%	19%	26%	21%	30%	27%	9%	12%	25%	20%
Very high	53	8	2	43	25	28	46	7	52	*	3	49	13
	7%	9%	4%	7%	5%	9%	6%	11%	10%	1%	2%	8%	9%
Don't Know (DO NOT READ OUT)	5	-	-	4	1	4	5	-	5	-	-	5	2
	1%	-%	-%	1%	*%	1%	1%	-%	1%	-%	-%	1%	1%
NET: High	225	24	14	182	119	106	200	25	197	6	24	201	43
	29%	28%	29%	28%	25%	36%	28%	41%	37%	10%	13%	33%	29%
NET: Low	253	31	19	203	170	83	237	16	108	44	95	159	53
	32%	35%	41%	32%	35%	28%	33%	27%	20%	79%	52%	26%	35%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 61 (continuation)

Page 534

The price of the postal services provided by Royal Mail in the last 12 months (QRM6. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects:)

Base: All respondents who use Royal Mail

	TOTAL	Quarter	
		Q1 2013	Q2 2013
Significance Level: 95%		a	b
Unweighted total	764	389	375
Weighted total	783	396	387
Very low	96	57	39
	12%	14%	10%
Quite low	158	78	80
	20%	20%	21%
Neither low nor high	300	157	143
	38%	40%	37%
Quite high	172	74	98
	22%	19%	25%
			a
Very high	53	26	27
	7%	7%	7%
Don't Know (DO NOT READ OUT)	5	4	*
	1%	1%	1%
NET: High	225	100	125
	29%	25%	32%
			a
NET: Low	253	135	119
	32%	34%	31%

Columns Tested: a,b

QRM6. SUMMARY. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate Royal Mail on each of the following aspects ...

Base: All respondents who use Royal Mail

	Aspects	
	The quality of the mail services provided by Royal Mail in the last 12 months	The price of the postal services provided by Royal Mail in the last 12 months
Significance Level: 95%	a	b
Unweighted total	764	764
Weighted total	783	783
Very low	5	96
	1%	12%
		a
Quite low	29	158
	4%	20%
		a
Neither low nor high	143	300
	18%	38%
		a
Quite high	368	172
	47%	22%
	b	
Very high	237	53
	30%	7%
	b	
Don't Know (DO NOT READ OUT)	2	5
	*%	1%
NET: High	604	225
	77%	29%
	b	
NET: Low	34	253
	4%	32%
		a

Columns Tested: a,b

Table 63

QRM7. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from Royal Mail?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Very dissatisfied

Fairly dissatisfied

Neither satisfied nor
dissatisfied

Fairly satisfied

Very satisfied

Don't Know (DO NOT READ
OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
764	a	b	c	d	e	f	g	h	i	j	k	l	m
783	35	48	39	52	55	86	52	62	35	103	105	92	464
	53	84	63	53	58	116	82	112	37	43	45	37	657
5	-	2	*	-	-	2	-	-	-	-	*	-	4
1%	-%	3%	%	-%	-%	2%	-%	-%	-%	-%	1%	-%	1%
31	4	5	4	1	1	6	*	6	-	1	1	2	27
4%	7%	5%	6%	3%	2%	5%	%	6%	-%	2%	2%	6%	4%
172	9	15	16	10	15	26	25	24	13	6	7	6	154
22%	17%	18%	25%	19%	26%	22%	31%	22%	36%	13%	15%	15%	23%
				j			kl		kl				j
364	22	31	32	27	28	57	40	48	19	24	20	15	305
46%	42%	37%	51%	50%	49%	49%	49%	43%	52%	55%	44%	41%	46%
									b				
211	18	30	11	15	13	26	16	33	4	13	17	14	167
27%	34%	36%	17%	28%	23%	22%	20%	29%	12%	30%	38%	37%	25%
	i	i							i		cf gim	cf gim	
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
575	40	62	43	42	42	83	56	81	23	36	37	29	472
73%	76%	74%	68%	79%	72%	71%	69%	73%	64%	85%	82%	78%	72%
										cf gim	im		
36	4	7	4	1	1	7	*	6	-	1	2	2	31
5%	7%	8%	6%	3%	2%	6%	%	6%	-%	2%	3%	6%	5%
		9											

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Table 63 (continuation)

Page 537

QRM7. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from Royal Mail?

Base: All respondents who use Royal Mail

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	764	620	80	22	16	26	144	489	275	699	65	519	131	45	69
Weighted total	783	758	14	4	3	4	24	542	241	750	33	573	124	37	48
Very dissatisfied	5 1%	4 1%	* 1%	- -%	- -%	- -%	* 1%	4 1%	* *%	5 1%	- -%	2 *%	* *%	- -%	2 4%
Fairly dissatisfied	31 4%	30 4%	1 7%	- -%	- -%	* 4%	1 4%	24 4%	7 3%	29 4%	2 6%	15 3%	9 7% a	1 3%	6 12% a
Neither satisfied nor dissatisfied	172 22%	167 22%	3 19%	1 36%	1 23%	1 27%	6 23%	120 22%	52 22%	167 22%	5 15%	128 22%	19 16%	7 19%	17 36% ab
Fairly satisfied	364 46%	353 47%	7 51%	1 35%	1 54%	1 21%	11 44%	256 47%	108 45%	348 46%	15 47%	270 47%	54 44%	20 55%	19 40%
Very satisfied	211 27%	204 27%	3 23%	1 29%	1 24%	2 49%	7 28%	138 25%	73 30%	201 27%	11 32%	158 28% d	41 33% d	8 22% d	4 8%
Don't Know (DO NOT READ OUT)	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
NET: Satisfied	575 73%	557 73%	10 74%	3 64%	2 77%	3 69%	17 72%	394 73%	181 75%	549 73%	26 79%	428 75% d	95 77% d	29 77% d	23 48%
NET: Dissatisfied	36 5%	34 5%	1 8%	- -%	- -%	* 4%	1 5%	28 5%	8 3%	34 4%	2 6%	17 3%	9 8% a	1 3%	8 16% ac

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 63 (continuation)

Page 538

QRM7. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from Royal Mail?

Base: All respondents who use Royal Mail

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	764	369	115	97	103	51	27	2	671	31	23	22	17	107	53	67	93
Weighted total	783	422	117	105	96	35	8	*	711	28	16	19	9	105	60	64	102
Very dissatisfied	5	3	-	-	2	*	-	-	3	-	-	2	-	2	-	2	*
	1%	1%	-%	-%	2%	*%	-%	-%	*%	-%	-%	9%	-%	2%	-%	3%	*%
Fairly dissatisfied	31	15	5	2	5	4	1	*	24	4	1	-	2	2	5	1	7
	4%	4%	4%	2%	5%	11%	8%	50%	3%	14%	7%	-%	18%	2%	9%	1%	7%
						ac				a							
Neither satisfied nor dissatisfied	172	98	23	20	25	4	1	*	156	4	5	6	1	16	17	9	24
	22%	23%	20%	19%	26%	12%	17%	50%	22%	15%	29%	30%	15%	16%	28%	14%	24%
Fairly satisfied	364	174	65	58	44	19	4	-	332	9	8	10	5	63	21	37	46
	46%	41%	55%	55%	46%	55%	51%	-%	47%	31%	49%	52%	60%	60%	35%	58%	46%
			a	a										b			
Very satisfied	211	132	25	25	21	7	2	-	195	11	2	2	1	21	17	15	23
	27%	31%	21%	24%	21%	21%	24%	-%	27%	40%	15%	9%	7%	20%	28%	24%	23%
		b															
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Satisfied	575	306	89	83	65	26	6	-	527	20	10	12	6	84	38	52	70
	73%	73%	76%	79%	67%	76%	75%	-%	74%	70%	64%	61%	67%	80%	63%	82%	69%
														b			
NET: Dissatisfied	36	17	5	2	7	4	1	*	27	4	1	2	2	5	5	2	7
	5%	4%	4%	2%	7%	12%	8%	50%	4%	14%	7%	9%	18%	4%	9%	4%	7%
						ac				a							

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 63 (continuation)

Page 539

QRM7. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from Royal Mail?

Base: All respondents who use Royal Mail

Significance Level: 95%

Unweighted total

Weighted total

Very dissatisfied

Fairly dissatisfied

Neither satisfied nor dissatisfied

Fairly satisfied

Very satisfied

Don't Know (DO NOT READ OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
764	a 374	b 131	c 255	a 694	b 418	c 707	d 330	e 166	f 581	a 312	b 697	c 127	a 561	b 488
783	396	134	249	705	407	724	331	127	596	311	709	107	573	487
5	2	*	2	5	2	5	4	1	2	4	5	*	5	2
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
31	15	8	8	27	19	27	16	4	22	13	29	6	25	21
4%	4%	6%	3%	4%	5%	4%	5%	3%	4%	4%	4%	5%	4%	4%
172	80	40	50	154	102	161	74	29	129	72	160	22	130	110
22%	20%	30%	20%	22%	25%	22%	22%	23%	22%	23%	22%	21%	23%	22%
364	178	64	120	333	187	339	159	66	299	144	334	44	276	234
46%	45%	48%	48%	47%	46%	47%	48%	52%	50%	46%	47%	41%	48%	48%
211	120	21	69	187	97	192	78	27	144	78	182	34	137	120
27%	30%	16%	28%	27%	24%	27%	23%	21%	24%	25%	26%	32%	24%	25%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
575	298	86	189	520	284	532	237	93	443	222	516	79	413	354
73%	75%	64%	76%	74%	70%	73%	72%	73%	74%	71%	73%	74%	72%	73%
36	17	8	10	31	21	31	20	5	24	18	34	6	30	24
5%	4%	6%	4%	4%	5%	4%	6%	4%	4%	6%	5%	5%	5%	5%

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Table 63 (continuation)

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QRM7. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from Royal Mail?

Base: All respondents who use Royal Mail

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	764	109	14	646	751	644	754	578	759	-	418	751	174	76	114	573
Weighted total	783	110	14	664	766	650	769	587	777	-	424	771	168	67	120	594
Very dissatisfied	5	-	-	5	5	5	5	2	5	-	2	5	*	*	-	4
	1%	-%	-%	1%	1%	1%	1%	*%	1%	-%	1%	1%	*%	1%	-%	1%
Fairly dissatisfied	31	4	-	27	31	25	31	24	31	-	15	31	10	5	8	18
	4%	4%	-%	4%	4%	4%	4%	4%	4%	-%	3%	4%	6%	7%	7%	3%
															c	
Neither satisfied nor dissatisfied	172	36	2	135	167	141	169	135	168	-	94	170	38	6	42	122
	22%	33%	13%	20%	22%	22%	22%	23%	22%	-%	22%	22%	23%	9%	35%	21%
		c													ac	a
Fairly satisfied	364	50	6	310	357	313	359	272	364	-	204	362	74	31	51	281
	46%	45%	44%	47%	47%	48%	47%	46%	47%	-%	48%	47%	44%	47%	42%	47%
Very satisfied	211	20	6	187	206	166	206	154	210	-	109	203	46	25	18	168
	27%	19%	43%	28%	27%	26%	27%	26%	27%	-%	26%	26%	27%	37%	15%	28%
				a										b		b
Don't Know (DO NOT READ OUT)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
NET: Satisfied	575	70	12	497	563	479	565	426	573	-	313	565	120	56	69	449
	73%	64%	87%	75%	74%	74%	73%	73%	74%	-%	74%	73%	72%	84%	58%	76%
				a										b		b
NET: Dissatisfied	36	4	-	32	36	30	36	26	36	-	17	36	10	5	8	22
	5%	4%	-%	5%	5%	5%	5%	4%	5%	-%	4%	5%	6%	7%	7%	4%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 63 (continuation)

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QRM7. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from Royal Mail?
Base: All respondents who use Royal Mail

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	764	81	38	634	481	283	701	63	531	49	174	590	146	2
Weighted total	783	88	46	640	485	298	722	61	536	56	181	602	151	1
Very dissatisfied	5 1%	-	2 5%	2 *	1 *	4 1%	4 1%	*	2 *	2 3%	2 1%	2 *	*	-
			ac			a				a			ac	
Fairly dissatisfied	31 4%	5 6%	8 17%	18 3%	18 4%	13 4%	29 4%	3 4%	4 1%	18 33%	23 13%	8 1%	7 5%	- -
			c							a				
Neither satisfied nor dissatisfied	172 22%	26 29%	6 13%	138 22%	123 25%	49 17%	159 22%	13 21%	42 8%	23 40%	68 37%	105 17%	30 20%	* 19%
					b					a				
Fairly satisfied	364 46%	44 50%	13 28%	302 47%	221 46%	142 48%	335 46%	29 47%	286 53%	10 18%	75 42%	288 48%	77 51%	* 81%
			b						b					
Very satisfied	211 27%	13 14%	17 37%	180 28%	122 25%	89 30%	195 27%	16 27%	202 38%	3 6%	13 7%	199 33%	36 24%	- -
			a						b			a		
Don't Know (DO NOT READ OUT)	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
NET: Satisfied	575 73%	56 65%	30 65%	481 75%	343 71%	232 78%	530 73%	45 74%	488 91%	13 23%	88 49%	487 81%	113 75%	* 81%
				a		a			b			a		
NET: Dissatisfied	36 5%	5 6%	10 22%	20 3%	19 4%	17 6%	33 5%	3 5%	6 1%	20 36%	25 14%	10 2%	8 5%	- -
			ac						a		b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

QRM7. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from Royal Mail?

Base: All respondents who use Royal Mail

	TOTAL	Quarter	
		Q1 2013	Q2 2013
Significance Level: 95%		a	b
Unweighted total	764	389	375
Weighted total	783	396	387
Very dissatisfied	5	*	4
	1%	*%	1%
		a	
Fairly dissatisfied	31	14	17
	4%	3%	5%
Neither satisfied nor dissatisfied	172	92	80
	22%	23%	21%
Fairly satisfied	364	201	163
	46%	51%	42%
		b	
Very satisfied	211	89	122
	27%	22%	32%
		a	
Don't Know (DO NOT READ OUT)	-	-	-
	-%	-%	-%
NET: Satisfied	575	290	285
	73%	73%	74%
NET: Dissatisfied	36	14	22
	5%	3%	6%
Columns Tested: a,b			

Table 64

QOP1a. You said earlier that you also use [QV5c provider] for your postal services needs. Thinking generally about the service you receive as a whole as a sender and recipient of mail, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how would you rate the quality of the services you receive from [QV5c provider]?
Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	b	*c	d	e	f	g	h	*i	j	k	l	m
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	2	-	-	-	*	-	-	-	2	-	-	-	-	2
	1%	-%	-%	-%	1%	-%	-%	-%	4%	-%	-%	-%	-%	1%
Fairly Dissatisfied	6	-	-	2	1	1	*	*	-	-	1	*	-	5
	1%	-%	-%	6%	4%	4%	*%	*%	-%	-%	3%	3%	-%	1%
Neither Satisfied Nor Dissatisfied	38	*	2	2	1	3	11	2	11	-	3	2	1	32
	9%	1%	4%	6%	4%	7%	13%	4%	21%	-%	13%	12%	11%	8%
									bgm					
Fairly Satisfied	167	13	23	15	10	14	23	20	15	15	7	7	4	149
	39%	50%	42%	47%	34%	41%	28%	44%	30%	60%	36%	44%	41%	39%
Very Satisfied	209	13	30	13	15	17	48	22	23	10	9	6	4	190
	49%	49%	54%	41%	53%	47%	58%	47%	45%	40%	48%	35%	47%	50%
							k							
Don't Know (DO NOT READ OUT)	5	-	-	-	1	*	*	2	-	-	-	1	-	4
	1%	-%	-%	-%	4%	1%	*%	4%	-%	-%	-%	6%	-%	1%
												m		
NET: Satisfied	376	26	52	28	25	31	71	42	38	25	16	13	8	339
	88%	99%	96%	89%	86%	88%	86%	91%	75%	100%	83%	79%	89%	89%
			hk											h
NET: Dissatisfied	8	-	-	2	1	1	*	*	2	-	1	*	-	7
	2%	-%	-%	6%	5%	4%	*%	*%	4%	-%	3%	3%	-%	2%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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Table 64 (continuation)

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QOP1a. You said earlier that you also use [QV5c provider] for your postal services needs. Thinking generally about the service you receive as a whole as a sender and recipient of mail, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how would you rate the quality of the services you receive from [QV5c provider]?

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	2	2	-	*	-	-	*	*	2	2	-	-	2	-	*
	1%	1%	-%	4%	-%	-%	1%	1%	2%	1%	-%	-%	2%	-%	1%
									a						
Fairly Dissatisfied	6	5	*	-	-	*	*	4	2	6	*	-	4	2	*
	1%	1%	2%	-%	-%	4%	2%	1%	2%	1%	1%	-%	3%	3%	1%
													a	a	
Neither Satisfied Nor Dissatisfied	38	36	1	*	*	*	1	34	4	35	2	15	8	6	8
	9%	9%	7%	3%	6%	3%	6%	10%	4%	9%	14%	8%	7%	11%	14%
								b							
Fairly Satisfied	167	156	6	3	1	1	11	114	53	159	7	70	47	23	26
	39%	39%	45%	54%	29%	28%	43%	35%	52%	39%	45%	36%	40%	42%	43%
									a						
Very Satisfied	209	198	7	2	1	2	12	168	41	203	7	104	55	24	26
	49%	49%	46%	36%	57%	60%	47%	52%	40%	49%	40%	54%	47%	44%	43%
								b							
Don't Know (DO NOT READ OUT)	5	4	-	*	*	*	*	5	-	4	*	4	*	*	*
	1%	1%	-%	3%	8%	4%	2%	1%	-%	1%	1%	2%	1%	1%	1%
NET: Satisfied	376	354	13	4	2	3	22	282	94	362	14	174	103	47	52
	88%	88%	91%	90%	85%	88%	90%	87%	92%	88%	85%	90%	88%	86%	85%
NET: Dissatisfied	8	7	*	*	-	*	1	4	4	8	*	-	6	2	*
	2%	2%	2%	4%	-%	4%	2%	1%	4%	2%	1%	-%	5%	3%	1%
													a	a	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 64 (continuation)

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QOP1a. You said earlier that you also use [QV5c provider] for your postal services needs. Thinking generally about the service you receive as a whole as a sender and recipient of mail, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how would you rate the quality of the services you receive from [QV5c provider]?

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	2	-	-	-	-	2	-	*	2	-	-	-	*	*	2	2	*
	1%	-%	-%	-%	-%	5%	-%	5%	1%	-%	-%	-%	1%	1%	2%	1%	1%
						ab									a		
Fairly Dissatisfied	6	*	3	*	-	*	1	-	4	*	1	-	*	4	2	2	3
	1%	1%	4%	1%	-%	1%	11%	-%	1%	1%	4%	-%	1%	1%	2%	1%	1%
						acde											
Neither Satisfied Nor Dissatisfied	38	8	9	4	9	7	2	-	19	6	4	4	4	30	2	19	13
	9%	6%	10%	5%	13%	15%	17%	-%	6%	16%	13%	12%	18%	11%	2%	10%	6%
						a				a			a				
Fairly Satisfied	167	52	25	30	35	19	3	1	109	13	16	14	15	109	46	75	80
	39%	37%	28%	44%	53%	43%	27%	35%	36%	33%	48%	43%	65%	40%	38%	42%	37%
					abf								ab				
Very Satisfied	209	78	52	34	21	17	5	2	160	19	12	15	4	127	70	79	118
	49%	55%	58%	50%	31%	37%	43%	61%	54%	50%	36%	44%	15%	46%	57%	44%	55%
		de	de	d					e	e		e			a		a
Don't Know (DO NOT READ OUT)	5	2	-	*	1	-	*	-	4	-	-	*	-	4	-	2	2
	1%	2%	-%	1%	2%	-%	3%	-%	1%	-%	-%	1%	-%	1%	-%	1%	1%
NET: Satisfied	376	130	78	64	56	35	9	4	268	32	28	29	18	236	116	154	198
	88%	92%	87%	93%	85%	80%	70%	95%	90%	83%	83%	88%	80%	86%	95%	86%	91%
		ef	f	ef											a		
NET: Dissatisfied	8	*	3	*	-	2	1	*	6	*	1	-	*	4	4	5	3
	2%	1%	4%	1%	-%	5%	11%	5%	2%	1%	4%	-%	2%	1%	3%	3%	2%
						ad	acd										

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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QOP1a. You said earlier that you also use [QV5c provider] for your postal services needs. Thinking generally about the service you receive as a whole as a sender and recipient of mail, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how would you rate the quality of the services you receive from [QV5c provider]?

Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	426	175	86	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	2	-	2	2	2	2	2	2	2	*	2	*	2	2
1%	-%	-%	1%	1%	1%	1%	1%	2%	1%	*%	1%	*%	1%	1%
Fairly Dissatisfied	6	1	2	4	4	4	4	2	4	3	4	2	3	4
1%	1%	2%	2%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
Neither Satisfied Nor Dissatisfied	38	16	6	35	27	37	29	17	30	23	37	7	30	31
9%	9%	7%	10%	9%	10%	9%	9%	12%	9%	8%	9%	6%	10%	10%
Fairly Satisfied	167	60	35	159	120	163	138	64	132	117	165	60	126	125
39%	34%	41%	43%	41%	44%	41%	41%	45%	39%	41%	42%	51%	41%	40%
Very Satisfied	209	95	42	187	116	189	163	55	166	143	184	49	145	147
49%	54%	48%	44%	48%	42%	47%	48%	39%	49%	50%	46%	41%	47%	47%
	c								e					
Don't Know (DO NOT READ OUT)	5	2	2	4	4	4	3	-	4	1	4	1	4	3
1%	1%	2%	*%	1%	1%	1%	1%	-%	1%	*%	1%	1%	1%	1%
NET: Satisfied	376	155	76	346	236	352	301	119	298	260	349	109	270	273
88%	89%	89%	87%	88%	86%	88%	89%	85%	88%	90%	88%	92%	87%	87%
NET: Dissatisfied	8	1	2	7	6	7	7	5	7	3	7	2	5	7
2%	1%	2%	3%	2%	2%	2%	2%	3%	2%	1%	2%	2%	2%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 64 (continuation)

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QOP1a. You said earlier that you also use [QV5c provider] for your postal services needs. Thinking generally about the service you receive as a whole as a sender and recipient of mail, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how would you rate the quality of the services you receive from [QV5c provider]?
Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	2	-	-	2	2	2	2	2	2	-	*	2	*	*	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	*%	1%	*%	*%	-%	1%
Fairly Dissatisfied	6	1	-	3	6	4	6	4	6	-	4	6	2	1	2	2
	1%	2%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	4%	1%
Neither Satisfied Nor Dissatisfied	38	6	3	25	38	31	38	33	38	-	24	37	14	8	6	24
	9%	8%	28%	8%	9%	8%	9%	9%	9%	-%	9%	9%	10%	12%	12%	8%
Fairly Satisfied	167	26	3	123	165	150	165	137	167	-	116	167	64	29	18	120
	39%	36%	24%	40%	40%	40%	39%	38%	39%	-%	42%	40%	44%	41%	38%	39%
Very Satisfied	209	39	5	154	202	185	204	180	209	-	133	204	66	33	23	154
	49%	53%	48%	50%	48%	49%	49%	50%	49%	-%	47%	48%	45%	46%	47%	50%
Don't Know (DO NOT READ OUT)	5	1	-	3	5	3	5	4	5	-	2	5	1	-	-	4
	1%	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	-%	-%	1%
NET: Satisfied	376	66	8	276	367	335	369	317	376	-	249	371	130	61	41	274
	88%	89%	72%	89%	88%	89%	88%	88%	88%	-%	89%	88%	88%	87%	85%	90%
NET: Dissatisfied	8	1	-	5	8	6	8	7	8	-	4	8	2	1	2	4
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	1%	1%	4%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 64 (continuation)

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QOP1a. You said earlier that you also use [QV5c provider] for your postal services needs. Thinking generally about the service you receive as a whole as a sender and recipient of mail, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how would you rate the quality of the services you receive from [QV5c provider]?

Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	2	2	*	-	2	*	2	-	2	-	2	*	-	2
	1%	2%	%	-%	1%	%	1%	-%	1%	-%	2%	%	-%	29%
		c												
Fairly Dissatisfied	6	4	1	1	4	2	6	-	2	2	3	2	-	6
	1%	3%	2%	1%	1%	2%	1%	-%	1%	6% a	2%	1%	-%	71%
Neither Satisfied Nor Dissatisfied	38	13	6	19	27	11	38	-	22	4	12	21	-	-
	9%	9%	13%	8%	9%	9%	9%	-%	9%	13%	9%	8%	-%	-%
Fairly Satisfied	167	54	20	93	128	39	164	3	96	12	56	95	167	-
	39%	39%	45%	39%	41%	34%	39%	32%	38%	39%	41%	37%	44%	-%
Very Satisfied	209	66	17	123	148	62	204	5	129	13	63	134	209	-
	49%	47%	40%	51%	48%	53%	49%	62%	51%	42%	46%	53%	56%	-%
Don't Know (DO NOT READ OUT)	5	*	-	4	2	2	4	*	2	*	1	3	-	-
	1%	%	-%	2%	1%	2%	1%	6%	1%	1%	1%	1%	-%	-%
NET: Satisfied	376	120	37	216	275	101	368	8	225	25	118	230	376	-
	88%	86%	85%	90%	89%	87%	88%	94%	89%	81%	87%	90%	100%	-%
NET: Dissatisfied	8	6	1	1	6	2	8	-	4	2	5	2	-	8
	2%	4%	2%	1%	2%	2%	2%	-%	2%	6%	3%	1%	-%	100%
		c												

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 64 (continuation)

Page 549

QOP1a. You said earlier that you also use [QV5c provider] for your postal services needs. Thinking generally about the service you receive as a whole as a sender and recipient of mail, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how would you rate the quality of the services you receive from [QV5c provider]?
Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	2	2	-	-	-
	1%	2%	-%	-%	-%
Fairly Dissatisfied	6	4	*	2	*
	1%	3%	-%	2%	-%
Neither Satisfied Nor Dissatisfied	38	7	13	8	9
	9%	6%	11%	8%	10%
Fairly Satisfied	167	48	39	42	38
	39%	42%	33%	42%	40%
Very Satisfied	209	51	66	46	46
	49%	45%	56%	46%	50%
Don't Know (DO NOT READ OUT)	5	2	*	2	-
	1%	2%	-%	2%	-%
NET: Satisfied	376	99	105	88	84
	88%	87%	88%	88%	90%
NET: Dissatisfied	8	6	*	2	*
	2%	5%	-%	2%	-%
Columns Tested: a,b,c,d		bd			

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Delivery time (when you receive your mail delivery) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%														
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	4	-	-	2	-	-	-	-	2	-	-	-	-	4
	1%	-%	-%	6%	-%	-%	-%	-%	4%	-%	-%	-%	-%	1%
Fairly Dissatisfied	9	2	-	-	1	1	-	2	2	-	*	*	-	8
	2%	7%	-%	-%	4%	4%	-%	4%	4%	-%	3%	3%	-%	2%
Neither Satisfied Nor Dissatisfied	29	2	5	*	*	3	4	2	6	4	2	1	1	26
	7%	7%	8%	1%	1%	7%	5%	4%	12%	16%	8%	6%	6%	7%
Fairly Satisfied	151	7	15	14	10	13	31	13	19	10	5	8	4	134
	35%	29%	28%	46%	34%	36%	38%	28%	38%	39%	28%	47%	40%	35%
Very Satisfied	173	9	28	9	13	17	32	17	21	7	9	6	4	153
	41%	35%	51%	30%	44%	48%	39%	36%	41%	30%	50%	35%	48%	40%
Don't Know (DO NOT READ OUT)	61	6	7	5	5	2	14	13	*	4	2	2	1	57
	14%	21%	13%	17%	18%	5%	18%	27%	1%	16%	11%	9%	6%	15%
NET: Satisfied	323	17	43	24	23	29	64	30	40	17	15	14	8	287
	76%	64%	79%	76%	77%	84%	77%	65%	79%	68%	78%	82%	88%	75%
NET: Dissatisfied	13	2	-	2	1	1	-	2	4	-	*	*	-	12
	3%	7%	-%	6%	4%	4%	-%	4%	8%	-%	3%	3%	-%	3%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m								f						

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Delivery time (when you receive your mail delivery) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	4	4	-	-	-	-	-	2	2	4	-	-	2	2	-
	1%	1%	-%	-%	-%	-%	-%	1%	2%	1%	-%	-%	2%	3%	-%
													a		
Fairly Dissatisfied	9	9	-	-	-	-	-	9	*	9	-	5	4	-	-
	2%	2%	-%	-%	-%	-%	-%	3%	*%	2%	-%	3%	3%	-%	-%
Neither Satisfied Nor Dissatisfied	29	27	1	1	-	*	2	23	6	25	4	16	5	4	5
	7%	7%	8%	13%	-%	4%	8%	7%	6%	6%	23% a	8%	4%	6%	8%
Fairly Satisfied	151	143	5	1	1	1	8	109	42	149	2	60	48	20	22
	35%	36%	35%	22%	45%	26%	32%	34%	41%	36% b	10%	31%	41%	36%	36%
Very Satisfied	173	161	8	2	1	2	12	133	40	163	10	87	39	21	25
	41%	40%	54% a	47%	23%	51%	50%	41%	39%	40%	61% a	45%	34%	39%	41%
Don't Know (DO NOT READ OUT)	61	58	*	1	1	1	3	49	12	60	1	25	18	9	9
	14%	14% b	3%	17%	33%	19%	11% b	15%	12%	15%	5%	13%	15%	16%	15%
NET: Satisfied	323	303	13	3	2	3	20	242	82	311	12	147	88	41	48
	76%	75%	89% a	70%	67%	76%	82%	74%	80%	76%	71%	76%	75%	75%	77%
NET: Dissatisfied	13	13	-	-	-	-	-	11	3	13	-	5	6	2	-
	3%	3% f	-%	-%	-%	-%	-%	3%	3%	3%	-%	3%	5% d	3%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Delivery time (when you receive your mail delivery) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	4	-	2	-	-	2	-	-	4	-	-	-	-	2	2	4	-
	1%	-%	2%	-%	-%	5%	-%	-%	1%	-%	-%	-%	-%	1%	2%	2%	-%
						a										b	
Fairly Dissatisfied	9	5	2	1	-	-	1	-	7	-	2	-	-	2	6	-	8
	2%	3%	2%	2%	-%	-%	11%	-%	3%	-%	5%	-%	-%	1%	5%	-%	4%
						bde									a		a
Neither Satisfied Nor Dissatisfied	29	10	7	5	5	2	-	*	18	1	4	4	3	22	4	16	11
	7%	7%	8%	8%	7%	6%	-%	5%	6%	2%	10%	12%	11%	8%	4%	9%	5%
Fairly Satisfied	151	40	26	28	35	16	4	1	101	14	12	9	15	108	32	76	65
	35%	29%	29%	41%	52%	36%	29%	35%	34%	35%	36%	27%	64%	40%	26%	42%	30%
					abf								abced	b		b	
Very Satisfied	173	67	46	28	10	16	4	*	124	20	11	15	3	101	57	61	97
	41%	48%	52%	41%	16%	37%	33%	5%	42%	51%	33%	44%	13%	37%	46%	34%	45%
		d	d	d		d			e	e		e					a
Don't Know (DO NOT READ OUT)	61	19	7	6	17	7	3	2	43	4	5	6	3	38	20	23	36
	14%	13%	7%	9%	25%	16%	28%	55%	14%	11%	15%	17%	11%	14%	17%	13%	17%
					abc		bc										
NET: Satisfied	323	108	73	56	45	33	8	2	225	34	23	23	18	210	89	137	162
	76%	76%	81%	82%	68%	73%	62%	40%	76%	87%	69%	71%	78%	77%	73%	76%	75%
			f	f													
NET: Dissatisfied	13	5	4	1	-	2	1	-	11	-	2	-	-	4	8	4	8
	3%	3%	4%	2%	-%	5%	11%	-%	4%	-%	5%	-%	-%	1%	7%	2%	4%
						d									a		

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Delivery time (when you receive your mail delivery) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	4	2	2	4	4	4	4	4	4	2	4	-	4	4
1%	-	2%	1%	1%	1%	1%	1%	3%	1%	1%	1%	-%	1%	1%
Fairly Dissatisfied	9	6	2	9	7	9	7	-	7	7	9	3	5	6
2%	4%	2%	1%	2%	2%	2%	2%	-%	2%	2%	2%	2%	1%	2%
				e	e	e			e					
Neither Satisfied Nor Dissatisfied	29	4	8	26	19	28	22	8	19	18	28	4	21	21
7%	10%	5%	5%	7%	7%	7%	6%	6%	6%	6%	7%	4%	7%	7%
Fairly Satisfied	151	35	69	143	108	146	128	65	124	110	146	54	114	121
35%	25%	41%	43%	37%	39%	36%	38%	46%	37%	38%	37%	45%	37%	39%
		a	a					act						
Very Satisfied	173	30	61	155	100	158	141	42	134	124	154	50	119	114
41%	46%	35%	38%	40%	37%	39%	41%	30%	40%	43%	39%	42%	38%	36%
				e		e	e		e					
Don't Know (DO NOT READ OUT)	61	13	19	54	35	56	39	22	49	27	56	8	47	47
14%	16%	16%	12%	14%	13%	14%	12%	16%	15%	9%	14%	7%	15%	15%
											c			
NET: Satisfied	323	123	130	299	208	303	268	107	259	234	301	103	233	235
76%	71%	76%	81%	76%	76%	76%	79%	76%	76%	81%	76%	87%	75%	75%
			a									b		
NET: Dissatisfied	13	6	4	13	11	13	11	4	11	8	13	3	8	10
3%	4%	4%	2%	3%	4%	3%	3%	3%	3%	3%	3%	2%	3%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Delivery time (when you receive your mail delivery) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	4	-	-	4	4	4	4	4	4	-	2	4	-	-	2	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	4%	1%
Fairly Dissatisfied	9	2	-	4	9	7	9	9	9	-	9	9	1	*	5	4
	2%	2%	-%	1%	2%	2%	2%	3%	2%	-%	3%	2%	1%	1%	10%	1%
															ac	
Neither Satisfied Nor Dissatisfied	29	*	-	25	29	24	29	26	29	-	17	29	8	4	1	23
	7%	1%	-%	8%	7%	6%	7%	7%	7%	-%	6%	7%	5%	6%	2%	7%
				a												
Fairly Satisfied	151	35	1	106	149	132	149	124	151	-	105	150	63	26	21	104
	35%	48%	12%	34%	36%	35%	35%	34%	35%	-%	38%	36%	42%	37%	43%	34%
		c														
Very Satisfied	173	29	6	123	165	150	167	144	173	-	110	169	51	33	15	125
	41%	39%	54%	40%	40%	40%	40%	40%	40%	-%	39%	40%	35%	47%	30%	41%
Don't Know (DO NOT READ OUT)	61	8	4	49	61	59	61	55	61	-	37	59	25	7	6	48
	14%	11%	35%	16%	15%	16%	15%	15%	14%	-%	13%	14%	17%	10%	12%	16%
NET: Satisfied	323	64	7	229	314	282	316	268	323	-	215	320	114	59	35	229
	76%	86%	65%	74%	75%	75%	75%	74%	76%	-%	77%	76%	77%	84%	73%	75%
		c														
NET: Dissatisfied	13	2	-	8	13	11	13	13	13	-	11	13	1	*	7	6
	3%	2%	-%	3%	3%	3%	3%	4%	3%	-%	4%	3%	1%	1%	14%	2%
											c				ac	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Delivery time (when you receive your mail delivery) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	4	4	-	-	4	-	4	-	2	2	4	-	-	4
	1%	3%	-%	-%	1%	-%	1%	-%	1%	6%	3%	-%	-%	49%
		c								a	b			
Fairly Dissatisfied	9	5	2	3	5	4	9	-	5	*	3	3	4	2
	2%	4%	4%	1%	2%	3%	2%	-%	2%	2%	2%	1%	1%	22%
Neither Satisfied Nor Dissatisfied	29	11	3	15	21	8	29	-	17	2	6	19	13	2
	7%	8%	6%	6%	7%	7%	7%	-%	7%	7%	4%	7%	3%	23%
Fairly Satisfied	151	47	17	87	113	38	148	3	87	6	41	100	135	*
	35%	34%	38%	36%	36%	33%	35%	32%	34%	21%	30%	39%	36%	6%
Very Satisfied	173	52	18	100	124	48	167	5	102	14	58	100	170	-
	41%	38%	41%	41%	40%	42%	40%	62%	40%	45%	42%	39%	45%	-%
Don't Know (DO NOT READ OUT)	61	20	5	36	44	17	60	*	40	6	25	33	54	-
	14%	14%	10%	15%	14%	15%	14%	6%	16%	19%	19%	13%	14%	-%
NET: Satisfied	323	99	35	187	237	86	315	8	189	20	98	200	305	*
	76%	71%	80%	78%	76%	74%	75%	94%	75%	66%	72%	78%	81%	6%
NET: Dissatisfied	13	9	2	3	9	4	13	-	7	2	7	3	4	6
	3%	6%	4%	1%	3%	3%	3%	-%	3%	7%	5%	1%	1%	71%
		c									b			

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Delivery time (when you receive your mail delivery) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	4	4	-	-	-
	1%	3%	-%	-%	-%
		b			
Fairly Dissatisfied	9	1	-	3	5
	2%	1%	-%	3%	6%
					b
Neither Satisfied Nor Dissatisfied	29	6	7	11	6
	7%	5%	6%	11%	6%
Fairly Satisfied	151	38	47	37	29
	35%	33%	39%	37%	31%
Very Satisfied	173	47	53	33	40
	41%	41%	44%	33%	43%
Don't Know (DO NOT READ OUT)	61	18	13	16	13
	14%	16%	11%	16%	14%
NET: Satisfied	323	85	99	70	69
	76%	74%	84%	70%	74%
			c		
NET: Dissatisfied	13	5	-	3	5
	3%	5%	-%	3%	6%
		b			b

Columns Tested: a,b,c,d

Table 66

Delivery consistency / reliability (e.g. arrives as promised consistently) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	b	*c	d	e	f	g	h	*i	j	k	l	m
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	*	-	-	-	-	-	*	-	-	-	-	-	-	*
	*%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	*%
Fairly Dissatisfied	8	-	-	2	1	1	-	*	2	-	*	*	-	7
	2%	-%	-%	6%	4%	4%	-%	*%	4%	-%	3%	3%	-%	2%
Neither Satisfied Nor Dissatisfied	44	2	5	4	1	2	7	4	13	4	1	*	1	42
	10%	7%	10%	12%	5%	5%	9%	8%	25%	16%	8%	3%	7%	11%
Fairly Satisfied	156	13	15	11	10	15	33	15	13	11	6	9	3	137
	37%	51%	28%	35%	34%	44%	41%	32%	26%	43%	31%	55%	34%	36%
Very Satisfied	179	7	30	11	12	15	32	19	23	10	9	5	6	159
	42%	28%	54%	36%	39%	44%	39%	40%	45%	42%	50%	30%	59%	42%
			k										k	
Don't Know (DO NOT READ OUT)	40	4	5	4	5	1	9	9	-	-	2	2	-	37
	9%	14%	8%	11%	18%	4%	11%	20%	-%	-%	9%	9%	-%	10%
				hl			ehl							
NET: Satisfied	334	20	45	22	21	31	66	34	36	21	15	14	9	296
	78%	79%	82%	71%	73%	87%	80%	72%	71%	84%	81%	85%	93%	78%
													dghm	
NET: Dissatisfied	8	-	-	2	1	1	*	*	2	-	*	*	-	7
	2%	-%	-%	6%	4%	4%	*%	*%	4%	-%	3%	3%	-%	2%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 66 (continuation)

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Delivery consistency / reliability (e.g. arrives as promised consistently) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	*	-	-	-	-	*	*	*	-	-	*	-	-	-	*
	%	-%	-%	-%	-%	4%	1%	%	-%	-%	1%	-%	-%	-%	%
Fairly Dissatisfied	8	7	*	-	-	-	*	7	*	8	-	1	4	2	-
	2%	2%	1%	-%	-%	-%	1%	2%	%	2%	-%	1%	4%	3%	-%
Neither Satisfied Nor Dissatisfied	44	42	1	1	*	*	2	34	11	40	4	22	8	9	5
	10%	10%	6%	20%	8%	6%	9%	10%	10%	10%	23% a	12%	7%	16% b	9%
Fairly Satisfied	156	148	5	1	1	1	8	112	43	151	5	56	51	20	28
	37%	37%	38%	26%	35%	20%	33%	35%	43%	37%	30%	29%	44% a	37%	45% a
Very Satisfied	179	166	7	2	1	2	13	138	41	171	7	95	42	17	25
	42%	41%	52%	51%	33%	66%	52% a	42%	40%	42%	45%	49% bc	36%	30%	41%
Don't Know (DO NOT READ OUT)	40	39	*	*	1	*	1	33	6	40	*	18	12	7	3
	9%	10% b	2%	3%	24%	4%	5%	10%	6%	10%	2%	9%	10%	13%	5%
NET: Satisfied	334	314	13	4	2	3	21	250	84	322	12	151	93	37	53
	78%	78%	91% a	77%	67%	86%	85%	77%	83%	79%	75%	79%	80%	67%	86% c
NET: Dissatisfied	8	7	*	-	-	*	*	7	*	8	*	1	4	2	*
	2%	2%	1%	-%	-%	4%	1%	2%	%	2%	1%	1%	4%	3%	%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Delivery consistency / reliability (e.g. arrives as promised consistently) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	*	-	*	-	-	-	-	-	-	-	-	-	*	-	-	-	-
	%	-	%	-	-	-	-	-	-	-	-	-	1%	-	-	-	-
Fairly Dissatisfied	8	-	2	2	-	2	1	-	7	1	-	-	-	6	-	3	3
	2%	-	2%	3%	-	5%	11%	-	2%	2%	-	-	-	2%	-	2%	2%
						a	abd										
Neither Satisfied Nor Dissatisfied	44	18	10	3	6	6	*	*	28	6	4	3	4	30	9	19	20
	10%	13%	11%	4%	9%	14%	4%	5%	9%	15%	12%	8%	18%	11%	7%	10%	9%
Fairly Satisfied	156	44	26	27	37	16	4	1	102	10	16	13	14	103	42	79	66
	37%	31%	29%	39%	56%	37%	30%	35%	34%	27%	48%	39%	62%	38%	34%	44%	30%
					abcef								ab			b	
Very Satisfied	179	71	45	31	10	18	4	*	131	20	10	14	4	107	59	60	107
	42%	50%	51%	45%	15%	40%	35%	5%	44%	51%	29%	42%	17%	39%	48%	33%	49%
		d	d	d		d	d		e	ce		e				a	
Don't Know (DO NOT READ OUT)	40	8	6	6	14	2	3	2	30	2	4	4	*	27	12	19	21
	9%	6%	7%	8%	20%	4%	21%	55%	10%	5%	11%	11%	2%	10%	10%	10%	9%
					abce		abe										
NET: Satisfied	334	114	72	58	47	34	8	2	233	30	26	27	18	210	101	139	173
	78%	81%	80%	84%	71%	77%	65%	40%	78%	78%	77%	81%	79%	77%	83%	77%	80%
				f													
NET: Dissatisfied	8	-	2	2	-	2	1	-	7	1	-	-	*	6	-	3	3
	2%	-	2%	3%	-	5%	11%	-	2%	2%	-	-	1%	2%	-	2%	2%
						a	abd										

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 66 (continuation)

Page 560

Delivery consistency / reliability (e.g. arrives as promised consistently) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	441	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	426	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	*	-	-	*	*	*	*	*	*	*	*	*	-	-	-
	%	-%	-%	%	%	%	%	%	%	%	%	%	-%	-%	-%
Fairly Dissatisfied	8	-	3	5	8	8	8	5	5	8	2	8	2	5	6
	2%	-%	4%	3%	2%	3%	2%	1%	3%	2%	1%	2%	2%	2%	2%
			a	a											
Neither Satisfied Nor Dissatisfied	44	26	5	13	40	33	42	33	17	29	28	42	9	36	34
	10%	15%	6%	8%	10%	12%	11%	10%	12%	8%	10%	11%	8%	12%	11%
		b													
Fairly Satisfied	156	49	35	67	145	105	150	128	59	132	108	150	55	114	118
	37%	28%	40%	42%	37%	38%	37%	38%	42%	39%	38%	38%	46%	37%	38%
		a	a	a											
Very Satisfied	179	81	36	61	160	100	162	145	44	135	130	159	48	121	119
	42%	47%	42%	38%	41%	37%	40%	43%	31%	40%	45%	40%	41%	39%	38%
					e		e	e		e					
Don't Know (DO NOT READ OUT)	40	18	7	15	38	27	39	28	17	35	19	38	4	33	36
	9%	10%	8%	9%	10%	10%	10%	8%	12%	10%	7%	10%	4%	11%	11%
											c				
NET: Satisfied	334	131	71	128	305	205	311	273	102	267	238	309	103	235	237
	78%	75%	82%	80%	78%	75%	78%	80%	73%	79%	83%	78%	87%	76%	76%
					e		e	e				b	b		
NET: Dissatisfied	8	-	3	5	8	8	8	5	5	8	3	8	2	5	6
	2%	-%	4%	3%	2%	3%	2%	2%	4%	2%	1%	2%	2%	2%	2%
			a	a											

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 66 (continuation)

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Delivery consistency / reliability (e.g. arrives as promised consistently) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	*	-	-	-	*	*	*	*	*	-	-	*	*	-	-	*
	%	-%	-%	-%	%	%	%	%	%	-%	-%	%	%	-%	-%	%
Fairly Dissatisfied	8	1	-	5	8	7	8	8	8	-	5	8	*	*	3	4
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	%	1%	6%	1%
															c	
Neither Satisfied Nor Dissatisfied	44	4	2	32	44	38	44	39	44	-	32	44	18	7	5	32
	10%	6%	16%	10%	11%	10%	11%	11%	10%	-%	12%	10%	12%	10%	9%	11%
Fairly Satisfied	156	33	1	109	154	135	154	128	156	-	103	155	63	28	18	108
	37%	45%	12%	35%	37%	36%	37%	35%	37%	-%	37%	37%	43%	40%	37%	35%
Very Satisfied	179	29	4	133	172	158	174	152	179	-	114	175	51	32	20	127
	42%	39%	38%	43%	41%	42%	41%	42%	42%	-%	41%	42%	34%	45%	40%	42%
Don't Know (DO NOT READ OUT)	40	6	4	31	40	38	40	34	40	-	25	38	15	2	3	34
	9%	8%	35%	10%	10%	10%	10%	10%	9%	-%	9%	9%	11%	3%	7%	11%
															a	
NET: Satisfied	334	62	5	242	325	292	327	280	334	-	217	331	113	60	38	235
	78%	84%	49%	78%	78%	78%	78%	78%	78%	-%	78%	79%	77%	86%	78%	77%
NET: Dissatisfied	8	1	-	5	8	7	8	8	8	-	5	8	1	*	3	4
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	%	1%	6%	1%
															c	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 66 (continuation)

Page 562

Delivery consistency / reliability (e.g. arrives as promised consistently) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	*	-	*	-	*	-	*	-	-	-	-	-	-	*
	*%	-%	*%	-%	*%	-%	*%	-%	-%	-%	-%	-%	-%	2%
Fairly Dissatisfied	8	4	1	3	6	1	8	-	2	2	2	4	-	4
	2%	3%	1%	1%	2%	1%	2%	-%	1%	6% a	1%	2%	-%	46%
Neither Satisfied Nor Dissatisfied	44	18	5	21	33	11	44	-	29	1	12	26	19	3
	10%	13%	12%	9%	11%	10%	11%	-%	11%	2%	9%	10%	5%	35%
Fairly Satisfied	156	52	13	90	116	39	153	2	92	7	42	101	145	1
	37%	37%	30%	37%	38%	34%	37%	27%	36%	22%	31%	39%	38%	17%
Very Satisfied	179	54	20	102	128	51	173	6	109	16	63	103	179	-
	42%	39%	45%	43%	41%	44%	41%	68%	43%	52%	46%	40%	48%	-%
Don't Know (DO NOT READ OUT)	40	11	5	24	27	13	39	*	22	6	17	22	33	-
	9%	8%	10%	10%	9%	11%	9%	6%	9%	19%	13%	9%	9%	-%
NET: Satisfied	334	106	33	192	244	90	326	8	201	23	105	203	323	1
	78%	76%	76%	80%	79%	78%	78%	94%	79%	73%	77%	80%	86%	17%
NET: Dissatisfied	8	4	1	3	6	1	8	-	2	2	2	4	-	4
	2%	3%	2%	1%	2%	1%	2%	-%	1%	6% a	1%	2%	-%	48%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 66 (continuation)

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Delivery consistency / reliability (e.g. arrives as promised consistently) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	*	-	*	-	-
	*%	-%	*%	-%	-%
Fairly Dissatisfied	8	4	2	*	1
	2%	3%	2%	*%	1%
Neither Satisfied Nor Dissatisfied	44	8	11	16	9
	10%	7%	9%	16%	10%
				a	
Fairly Satisfied	156	43	41	40	31
	37%	38%	35%	40%	34%
Very Satisfied	179	42	52	39	46
	42%	36%	43%	40%	49%
Don't Know (DO NOT READ OUT)	40	18	13	4	6
	9%	16%	11%	4%	6%
		cd	c		
NET: Satisfied	334	85	93	79	78
	78%	74%	78%	80%	83%
NET: Dissatisfied	8	4	2	*	1
	2%	3%	2%	*%	1%

Columns Tested: a,b,c,d

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Table 67

Page 564

Time of collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	b	*c	d	e	f	g	h	*i	j	k	l	m
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	3	-	-	-	-	-	*	2	-	-	*	*	-	2
	1%	-%	-%	-%	-%	-%	*%	4%	-%	-%	3%	3%	-%	1%
								m						
Fairly Dissatisfied	7	-	*	-	-	-	2	-	4	-	1	-	-	7
	2%	-%	1%	-%	-%	-%	2%	-%	8%	-%	3%	-%	-%	2%
									m					
Neither Satisfied Nor Dissatisfied	37	2	4	4	2	3	4	*	8	6	2	3	1	32
	9%	7%	8%	12%	6%	7%	4%	1%	17%	23%	9%	15%	10%	8%
									fg			g		
Fairly Satisfied	139	6	14	7	9	13	31	19	19	7	4	6	4	126
	33%	23%	25%	24%	32%	36%	38%	40%	38%	27%	21%	33%	45%	33%
							j	j					j	
Very Satisfied	201	14	30	15	17	20	39	15	17	13	11	6	4	180
	47%	56%	55%	47%	58%	56%	48%	32%	33%	50%	59%	35%	45%	47%
					g	g					ghk			
Don't Know (DO NOT READ OUT)	39	4	6	5	1	*	6	11	2	-	1	2	-	36
	9%	14%	12%	17%	4%	1%	7%	23%	4%	-%	6%	13%	-%	9%
			e					defhijlm				el		
NET: Satisfied	340	20	44	22	26	32	71	34	36	19	15	12	8	305
	80%	79%	80%	71%	90%	92%	86%	72%	71%	77%	80%	69%	90%	80%
					k	ghk	k						k	
NET: Dissatisfied	10	-	*	-	-	-	2	2	4	-	1	*	-	8
	2%	-%	1%	-%	-%	-%	3%	4%	8%	-%	6%	3%	-%	2%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 67 (continuation) Page 565

Time of collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	3	3	-	-	-	*	*	2	*	3	*	-	3	-	*
	1%	1%	-%	-%	-%	4%	1%	1%	1%	1%	1%	-%	2%	-%	1%
													a		
Fairly Dissatisfied	7	7	*	-	*	-	1	7	*	7	*	4	2	-	1
	2%	2%	3%	-%	5%	-%	2%	2%	1%	2%	2%	2%	2%	-%	1%
Neither Satisfied Nor Dissatisfied	37	36	1	1	-	*	2	30	7	35	2	21	4	6	6
	9%	9%	5%	14%	-%	9%	7%	9%	7%	9%	11%	11%	4%	11%	10%
												b			
Fairly Satisfied	139	131	4	2	1	1	8	98	41	134	5	47	51	27	15
	33%	33%	31%	41%	32%	23%	32%	30%	40%	33%	33%	24%	43%	48%	25%
									a				ad	ad	
Very Satisfied	201	188	8	2	1	2	13	159	42	194	7	97	47	21	37
	47%	47%	58%	40%	50%	57%	54%	49%	41%	47%	41%	50%	40%	37%	60%
															bc
Don't Know (DO NOT READ OUT)	39	38	*	*	*	*	1	28	11	37	2	25	10	2	2
	9%	9%	3%	5%	13%	7%	5%	9%	11%	9%	12%	13%	9%	4%	4%
		b										cd			
NET: Satisfied	340	319	13	4	2	3	21	257	83	328	12	143	98	47	52
	80%	79%	89%	81%	82%	80%	85%	79%	82%	80%	74%	74%	84%	85%	84%
NET: Dissatisfied	10	9	*	-	*	*	1	9	1	10	*	4	5	-	1
	2%	2%	3%	-%	5%	4%	3%	3%	1%	2%	3%	2%	4%	-%	2%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 67 (continuation)

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Time of collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	3	2	*	*	-	-	-	-	2	*	-	-	*	*	2	*	2
	1%	2%	1%	1%	-%	-%	-%	-%	1%	1%	-%	-%	1%	1%	2%	1%	1%
Fairly Dissatisfied	7	2	2	-	-	2	*	*	4	2	-	*	1	7	-	4	3
	2%	1%	3%	-%	-%	6%	4%	3%	1%	5%	-%	1%	4%	3%	-%	2%	1%
Neither Satisfied Nor Dissatisfied	37	15	6	5	9	*	1	1	27	1	2	8	*	31	5	18	17
	9%	11%	6%	6%	13%	1%	5%	37%	9%	2%	7%	23%	1%	11%	4%	10%	8%
		e		e	e							abe		b			
Fairly Satisfied	139	37	29	26	32	12	3	-	91	20	11	6	10	89	41	70	60
	33%	26%	32%	38%	49%	28%	26%	-%	31%	51%	34%	19%	45%	33%	34%	39%	28%
				abef						ad			d			b	
Very Satisfied	201	70	49	31	19	25	6	1	137	16	19	18	11	120	66	67	120
	47%	50%	55%	44%	29%	57%	47%	14%	46%	41%	54%	55%	50%	44%	54%	37%	55%
		d	d			d										a	a
Don't Know (DO NOT READ OUT)	39	15	4	7	6	4	2	2	36	-	2	1	-	26	8	20	14
	9%	10%	4%	10%	9%	9%	18%	47%	12%	-%	5%	2%	-%	9%	6%	11%	6%
						b			be								
NET: Satisfied	340	107	78	57	52	38	9	1	228	36	30	25	22	209	108	137	180
	80%	76%	87%	82%	78%	85%	73%	14%	77%	92%	88%	74%	95%	77%	88%	76%	83%
			a							ad			ad		a		
NET: Dissatisfied	10	4	2	*	-	2	*	*	6	3	-	*	1	8	2	5	5
	2%	3%	3%	1%	-%	6%	4%	3%	2%	7%	-%	1%	4%	3%	2%	3%	2%
					d												

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 67 (continuation)

Page 567

Time of collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	441	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	426	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	3	2	-	1	3	2	3	3	1	3	3	3	*	3	3
	1%	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Fairly Dissatisfied	7	*	4	3	7	7	7	7	4	6	5	7	4	7	7
	2%	1%	5%	2%	2%	3%	2%	2%	3%	2%	2%	2%	4%	2%	2%
			a												
Neither Satisfied Nor Dissatisfied	37	18	4	13	36	18	36	28	10	30	25	36	6	27	23
	9%	10%	5%	8%	9%	7%	9%	8%	7%	9%	9%	9%	5%	9%	7%
Fairly Satisfied	139	54	26	59	133	98	137	117	54	117	98	137	47	107	114
	33%	31%	31%	37%	34%	36%	34%	34%	39%	35%	34%	34%	40%	35%	36%
Very Satisfied	201	85	39	74	179	120	184	166	56	156	144	182	58	138	141
	47%	48%	46%	46%	46%	44%	46%	49%	40%	46%	50%	46%	49%	44%	45%
							e								
Don't Know (DO NOT READ OUT)	39	16	12	10	33	28	33	19	16	26	14	33	3	28	26
	9%	9%	14%	6%	9%	10%	8%	6%	12%	8%	5%	8%	2%	9%	8%
			c			d			d			c			
NET: Satisfied	340	138	66	133	312	218	321	283	110	273	242	318	105	245	254
	80%	79%	76%	83%	80%	80%	80%	83%	78%	81%	84%	80%	89%	79%	81%
													b		
NET: Dissatisfied	10	2	4	4	10	10	10	10	5	9	8	10	5	9	9
	2%	1%	5%	3%	2%	3%	2%	3%	4%	3%	3%	2%	4%	3%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 67 (continuation)

Page 568

Time of collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	3	-	-	3	3	1	3	3	3	-	3	3	1	*	2	1
	1%	-%	-%	1%	1%	*%	1%	1%	1%	-%	1%	1%	*%	1%	4%	*%
Fairly Dissatisfied	7	4	-	3	7	7	7	7	7	-	4	7	2	*	*	6
	2%	5%	-%	1%	2%	2%	2%	2%	2%	-%	2%	2%	2%	1%	1%	2%
		c														
Neither Satisfied Nor Dissatisfied	37	3	-	30	37	34	37	34	37	-	22	37	10	4	2	31
	9%	4%	-%	10%	9%	9%	9%	9%	9%	-%	8%	9%	7%	6%	5%	10%
Fairly Satisfied	139	24	3	103	137	121	137	113	139	-	99	139	58	22	14	102
	33%	33%	29%	33%	33%	32%	33%	31%	33%	-%	35%	33%	40%	31%	29%	33%
Very Satisfied	201	38	6	144	196	181	198	178	201	-	134	199	65	38	26	137
	47%	52%	52%	46%	47%	48%	47%	49%	47%	-%	48%	47%	44%	53%	54%	45%
Don't Know (DO NOT READ OUT)	39	4	2	27	37	32	37	27	39	-	18	35	11	6	4	29
	9%	6%	19%	9%	9%	9%	9%	7%	9%	-%	6%	8%	7%	8%	8%	10%
NET: Satisfied	340	63	9	247	333	302	335	291	340	-	233	339	123	60	41	239
	80%	85%	81%	80%	80%	80%	80%	80%	80%	-%	83%	80%	84%	85%	83%	78%
NET: Dissatisfied	10	4	-	6	10	8	10	10	10	-	7	10	3	1	2	7
	2%	5%	-%	2%	2%	2%	2%	3%	2%	-%	3%	2%	2%	1%	4%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 67 (continuation)

Page 569

Time of collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	3	*	2	-	1	2	3	-	2	-	*	2	-	1
	1%	*%	6%	-%	*%	2%	1%	-%	1%	-%	*%	1%	-%	14%
			ac			a								
Fairly Dissatisfied	7	2	1	4	5	2	7	-	5	*	1	6	2	-
	2%	2%	2%	2%	2%	2%	2%	-%	2%	*%	1%	2%	1%	-%
Neither Satisfied Nor Dissatisfied	37	13	4	21	25	13	37	-	16	3	8	25	26	*
	9%	9%	8%	9%	8%	11%	9%	-%	6%	11%	6%	10%	7%	4%
Fairly Satisfied	139	45	14	79	108	31	137	2	74	7	46	84	123	4
	33%	33%	33%	33%	35%	27%	33%	21%	29%	22%	34%	33%	33%	44%
Very Satisfied	201	68	22	107	141	60	196	5	130	17	69	117	194	1
	47%	49%	51%	45%	45%	52%	47%	61%	51%	54%	50%	46%	52%	16%
Don't Know (DO NOT READ OUT)	39	10	*	29	31	8	37	2	26	4	13	21	31	2
	9%	7%	*%	12%	10%	7%	9%	18%	10%	13%	9%	8%	8%	22%
			b											
NET: Satisfied	340	114	37	187	249	91	333	7	204	24	115	201	317	5
	80%	82%	84%	78%	80%	79%	80%	82%	80%	76%	84%	79%	84%	60%
NET: Dissatisfied	10	3	3	4	6	4	10	-	7	*	2	8	2	1
	2%	2%	8%	2%	2%	4%	2%	-%	3%	*%	1%	3%	1%	14%
			c											

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 67 (continuation)

Page 570

Time of collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	3	*	*	*	2
	1%	*%	*%	*%	2%
Fairly Dissatisfied	7	3	4	-	-
	2%	2%	4%	-%	-%
			c		
Neither Satisfied Nor					
Dissatisfied	37	9	9	12	8
	9%	8%	7%	12%	8%
Fairly Satisfied	139	45	35	39	21
	33%	39%	29%	39%	23%
		d		d	
Very Satisfied	201	43	63	43	52
	47%	38%	53%	43%	56%
			a		a
Don't Know (DO NOT READ OUT)	39	15	8	6	11
	9%	13%	7%	6%	11%
NET: Satisfied	340	88	98	81	73
	80%	77%	82%	82%	78%
NET: Dissatisfied	10	3	5	*	2
	2%	3%	4%	*%	2%

Columns Tested: a,b,c,d

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Collection reliability (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	b	*c	d	e	f	g	h	*i	j	k	l	m
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	3	-	-	-	-	-	-	*	2	-	*	-	-	2
	1%	-%	-%	-%	-%	-%	-%	4%	4%	-%	3%	-%	-%	1%
Fairly Dissatisfied	3	-	-	-	*	-	*	-	-	1	*	*	-	2
	1%	-%	-%	-%	1%	-%	4%	-%	-%	5%	3%	3%	-%	4%
Neither Satisfied Nor Dissatisfied	22	-	4	2	*	3	2	4	4	*	2	*	*	19
	5%	-%	8%	6%	1%	7%	3%	8%	8%	1%	10%	3%	5%	5%
Fairly Satisfied	127	8	12	11	6	13	26	11	17	9	3	7	4	113
	30%	31%	22%	35%	19%	36%	32%	25%	34%	38%	19%	40%	43%	30%
Very Satisfied	234	14	32	13	22	20	48	22	25	14	11	7	4	211
	55%	56%	59%	42%	75%	56%	59%	48%	50%	56%	60%	40%	47%	55%
Don't Know (DO NOT READ OUT)	37	4	6	5	1	*	6	9	2	-	1	2	*	34
	9%	14%	12%	17%	4%	1%	7%	20%	4%	-%	6%	13%	5%	9%
NET: Satisfied	361	22	44	24	28	32	74	34	43	24	15	14	8	325
	85%	86%	81%	77%	94%	92%	90%	72%	83%	94%	79%	81%	90%	85%
NET: Dissatisfied	5	-	-	-	*	-	*	*	2	1	1	*	-	4
	1%	-%	-%	-%	1%	-%	4%	4%	4%	5%	5%	3%	-%	1%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m											m			

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Collection reliability (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	3	3	*	-	-	-	*	3	-	3	-	-	*	2	-
	1%	1%	1%	-%	-%	-%	1%	1%	-%	1%	-%	-%	*%	4%	-%
														a	
Fairly Dissatisfied	3	2	-	*	-	*	*	2	*	2	*	*	*	1	*
	1%	1%	-%	4%	-%	4%	1%	1%	*%	1%	1%	*%	*%	2%	1%
Neither Satisfied Nor Dissatisfied	22	21	1	*	-	-	1	18	5	22	-	9	3	2	8
	5%	5%	4%	7%	-%	-%	4%	5%	4%	5%	-%	5%	3%	4%	12%
														ab	
Fairly Satisfied	127	119	5	2	1	1	8	95	33	122	5	52	40	23	13
	30%	30%	34%	39%	27%	26%	33%	29%	32%	30%	31%	27%	35%	41%	21%
													d	ad	
Very Satisfied	234	220	8	2	1	2	14	181	53	223	11	108	63	25	39
	55%	55%	59%	44%	60%	63%	57%	56%	52%	54%	67%	56%	54%	45%	63%
														c	
Don't Know (DO NOT READ OUT)	37	36	*	*	*	*	1	26	11	37	*	23	10	2	2
	9%	9%	2%	5%	13%	7%	4%	8%	11%	9%	2%	12%	8%	4%	4%
		b										d			
NET: Satisfied	361	339	13	4	2	3	22	276	86	345	16	160	103	47	51
	85%	84%	93%	83%	87%	88%	90%	85%	84%	84%	98%	83%	88%	86%	83%
			a								a				
NET: Dissatisfied	5	5	*	*	-	*	*	5	*	5	*	*	1	4	*
	1%	1%	1%	4%	-%	4%	2%	1%	*%	1%	1%	*%	1%	6%	1%
														abd	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 68 (continuation)

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Collection reliability (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	3	2	-	*	-	*	-	-	*	*	2	-	-	1	-	1	-
	1%	2%	-%	1%	-%	*%	-%	-%	*%	1%	6%	-%	-%	*%	-%	*%	-%
											a						
Fairly Dissatisfied	3	1	1	*	-	-	-	*	2	*	-	-	*	2	-	1	1
	1%	1%	1%	1%	-%	-%	-%	5%	1%	1%	-%	-%	1%	1%	-%	1%	1%
Neither Satisfied Nor Dissatisfied	22	6	5	4	6	-	*	1	16	*	-	4	2	19	3	15	7
	5%	4%	5%	5%	9%	-%	4%	32%	5%	*%	-%	12%	10%	7%	2%	8%	3%
					e							bc	b			b	
Fairly Satisfied	127	36	23	19	32	13	4	*	84	18	9	8	7	87	35	62	60
	30%	26%	26%	27%	48%	30%	29%	3%	28%	48%	27%	26%	31%	32%	28%	35%	28%
					abce					ad							
Very Satisfied	234	82	57	39	23	27	6	1	161	19	21	20	13	140	77	83	134
	55%	58%	63%	56%	35%	60%	48%	14%	54%	50%	61%	60%	57%	51%	63%	46%	62%
		d	d	d		d									a		a
Don't Know (DO NOT READ OUT)	37	13	4	7	6	4	2	2	35	-	2	1	-	24	8	18	14
	9%	9%	5%	10%	8%	9%	18%	47%	12%	-%	5%	2%	-%	9%	6%	10%	6%
					b				be								
NET: Satisfied	361	119	80	58	55	40	10	1	245	38	30	28	20	226	112	145	194
	85%	84%	89%	84%	83%	91%	78%	16%	82%	97%	89%	85%	89%	83%	92%	81%	89%
										a					a		a
NET: Dissatisfied	5	3	1	1	-	*	-	*	2	1	2	-	*	3	-	2	1
	1%	2%	1%	1%	-%	*%	-%	5%	1%	2%	6%	-%	1%	1%	-%	1%	1%
											a						

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 68 (continuation)

Page 574

Collection reliability (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	3	2	1	1	3	3	3	*	1	3	3	-	*	1
1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
	a	a												
Fairly Dissatisfied	3	2	1	3	2	3	3	1	3	2	3	1	2	2
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Neither Satisfied Nor Dissatisfied	22	*	11	22	15	22	19	8	15	16	22	5	19	21
5%	6%	1%	7%	6%	6%	6%	5%	6%	4%	6%	5%	4%	6%	7%
	b		b											
Fairly Satisfied	127	25	53	121	85	126	102	47	113	86	126	44	94	99
30%	28%	29%	33%	31%	31%	31%	30%	33%	33%	30%	32%	37%	30%	32%
Very Satisfied	234	46	85	213	142	215	196	70	181	167	213	65	168	163
55%	56%	54%	53%	54%	52%	54%	58%	50%	53%	58%	54%	55%	54%	52%
Don't Know (DO NOT READ OUT)	37	12	10	32	26	32	17	14	26	14	32	3	27	27
9%	8%	14%	7%	8%	10%	8%	5%	10%	8%	5%	8%	3%	9%	9%
	c	c			d			d			c			
NET: Satisfied	361	71	138	335	227	341	299	117	294	253	338	109	262	262
85%	85%	83%	86%	85%	83%	85%	88%	83%	87%	88%	85%	91%	85%	84%
NET: Dissatisfied	5	2	1	3	5	5	5	1	3	5	5	1	2	3
1%	1%	2%	1%	1%	2%	1%	2%	1%	1%	2%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 68 (continuation)

Page 575

Collection reliability (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	3	-	-	1	3	2	3	3	3	-	3	3	-	-	-	3
	1%	-%	-%	*%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
Fairly Dissatisfied	3	-	-	2	3	3	3	3	3	-	2	3	3	1	2	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	1%	4%	*%
Neither Satisfied Nor Dissatisfied	22	4	-	19	22	17	22	18	22	-	13	22	6	1	2	19
	5%	5%	-%	6%	5%	4%	5%	5%	5%	-%	5%	5%	4%	1%	5%	6%
Fairly Satisfied	127	20	4	95	126	113	126	105	127	-	92	127	56	19	14	93
	30%	27%	33%	31%	30%	30%	30%	29%	30%	-	33%	30%	38%	27%	28%	31%
Very Satisfied	234	45	5	168	229	210	231	208	234	-	151	232	71	44	27	163
	55%	61%	48%	54%	55%	56%	55%	57%	55%	-%	54%	55%	48%	62%	56%	53%
Don't Know (DO NOT READ OUT)	37	5	2	25	35	31	35	25	37	-	18	34	11	6	4	28
	9%	6%	19%	8%	8%	8%	8%	7%	9%	-%	7%	8%	8%	8%	8%	9%
NET: Satisfied	361	66	9	263	354	323	356	312	361	-	243	360	128	63	41	256
	85%	89%	81%	85%	85%	86%	85%	86%	85%	-%	87%	86%	87%	90%	84%	84%
NET: Dissatisfied	5	-	-	3	5	5	5	5	5	-	5	5	3	1	2	3
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	2%	1%	2%	1%	4%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 68 (continuation)

Page 576

Collection reliability (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	3	2	1	-	3	-	3	-	*	-	*	*	-	1
	1%	2%	1%	-%	1%	-%	1%	-%	*%	-%	*%	*%	-%	8%
		c												
Fairly Dissatisfied	3	2	*	*	2	*	3	-	2	-	1	1	2	*
	1%	1%	1%	*%	1%	*%	1%	-%	1%	-%	1%	*%	*%	4%
Neither Satisfied Nor Dissatisfied	22	1	7	13	12	10	22	-	11	2	5	17	10	-
	5%	1%	16%	6%	4%	9%	5%	-%	4%	8%	4%	7%	3%	-%
		ac		a		a								
Fairly Satisfied	127	46	10	71	95	33	126	2	74	5	37	81	108	4
	30%	33%	23%	29%	30%	28%	30%	21%	29%	17%	27%	32%	29%	50%
Very Satisfied	234	78	25	128	170	64	229	5	141	19	81	137	227	1
	55%	56%	58%	53%	55%	55%	55%	61%	56%	62%	59%	54%	60%	16%
Don't Know (DO NOT READ OUT)	37	10	*	27	29	8	36	2	24	4	13	19	29	2
	9%	7%	*%	11%	9%	7%	9%	18%	9%	13%	9%	8%	8%	22%
		b												
NET: Satisfied	361	124	35	199	264	97	354	7	215	25	117	217	335	5
	85%	89%	81%	83%	85%	84%	85%	82%	85%	80%	86%	85%	89%	66%
NET: Dissatisfied	5	4	1	*	5	*	5	-	3	-	1	2	2	1
	1%	3%	2%	*%	2%	*%	1%	-%	1%	-%	1%	1%	*%	12%
		c												

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 68 (continuation) Page 577

Collection reliability (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	3	*	*	2	-
	1%	*%	*%	2%	-%
Fairly Dissatisfied	3	*	*	1	1
	1%	*%	*%	1%	1%
Neither Satisfied Nor Dissatisfied	22	4	5	7	7
	5%	3%	4%	7%	7%
Fairly Satisfied	127	36	33	37	21
	30%	32%	28%	38%	22%
Very Satisfied	234	61	73	47	53
	55%	53%	61%	47%	57%
Don't Know (DO NOT READ OUT)	37	13	8	6	11
	9%	11%	6%	6%	12%
NET: Satisfied	361	97	106	84	74
	85%	85%	89%	85%	79%
NET: Dissatisfied	5	1	*	3	1
	1%	1%	*%	3%	1%

Columns Tested: a,b,c,d

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Table 69 Page 578

Availability of a daily collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%													
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	381
Very Dissatisfied	*	-	-	-	-	-	-	*	-	-	-	-	*
	*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	*%
Fairly Dissatisfied	6	-	-	2	-	1	*	-	-	1	1	*	5
	1%	-%	-%	6%	-%	4%	*%	-%	-%	5%	3%	3%	1%
Neither Satisfied Nor Dissatisfied	23	2	6	*	*	3	2	2	4	*	*	1	20
	5%	7%	12%	*%	1%	7%	2%	4%	8%	2%	3%	9%	5%
Fairly Satisfied	99	6	9	11	7	10	15	6	17	7	4	4	88
	23%	23%	17%	35%	23%	28%	18%	12%	34%	27%	22%	26%	23%
Very Satisfied	256	13	36	13	21	21	56	28	27	17	11	8	231
	60%	49%	66%	41%	71%	60%	68%	59%	54%	66%	60%	49%	61%
Don't Know (DO NOT READ OUT)	43	5	3	6	1	*	9	11	2	-	2	2	38
	10%	21%	5%	18%	4%	1%	11%	24%	4%	-%	12%	13%	10%
NET: Satisfied	355	18	46	24	28	31	71	34	45	23	15	13	319
	83%	72%	83%	76%	94%	88%	86%	72%	88%	93%	82%	75%	84%
NET: Dissatisfied	6	-	-	2	-	1	*	*	-	1	1	*	5
	1%	-%	-%	6%	-%	4%	*%	*%	-%	5%	3%	3%	1%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m													

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Table 69 (continuation)

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Availability of a daily collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	*	-	*	-	-	-	*	*	-	*	-	-	-	*	-
	%	-%	1%	-%	-%	-%	1%	%	-%	%	-%	-%	-%	%	-%
Fairly Dissatisfied	6	5	-	-	*	*	*	3	2	5	*	-	4	1	*
	1%	1%	-%	-%	5%	4%	1%	1%	2%	1%	1%	-%	3%	2%	%
													a	a	
Neither Satisfied Nor Dissatisfied	23	21	1	*	-	*	1	18	5	22	*	13	3	3	4
	5%	5%	4%	8%	-%	6%	5%	6%	4%	5%	2%	7%	2%	5%	7%
Fairly Satisfied	99	92	4	1	1	*	7	73	27	97	3	39	28	20	11
	23%	23%	30%	29%	33%	12%	27%	22%	26%	24%	15%	20%	24%	37%	19%
														ad	
Very Satisfied	256	242	9	2	1	2	14	202	54	244	12	116	71	28	41
	60%	60%	62%	48%	29%	57%	56%	62%	53%	60%	71%	60%	60%	51%	67%
Don't Know (DO NOT READ OUT)	43	40	*	1	1	1	3	28	15	41	2	25	11	2	4
	10%	10%	3%	15%	33%	21%	10%	9%	14%	10%	11%	13%	9%	4%	7%
		b				b									
NET: Satisfied	355	335	13	4	1	2	20	275	80	341	14	155	99	49	53
	83%	83%	92%	77%	63%	69%	83%	85%	79%	83%	86%	80%	85%	88%	86%
			a												
NET: Dissatisfied	6	5	*	-	*	*	*	3	2	6	*	-	4	1	*
	1%	1%	1%	-%	5%	4%	2%	1%	2%	1%	1%	-%	3%	3%	%
													a	a	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 69 (continuation)

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Availability of a daily collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	*	-	-	-	-	*	-	-	*	-	-	-	-	*	-	*	-
	%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fairly Dissatisfied	6	3	2	*	-	-	-	*	4	*	1	*	*	2	3	1	4
	1%	2%	2%	1%	0%	0%	0%	3%	1%	1%	4%	0%	1%	1%	3%	1%	2%
Neither Satisfied Nor Dissatisfied	23	10	2	3	5	*	*	1	15	2	3	2	*	18	1	12	7
	5%	7%	3%	4%	8%	0%	4%	37%	5%	5%	8%	7%	1%	6%	1%	7%	3%
Fairly Satisfied	99	31	12	18	24	11	3	-	65	13	6	8	7	67	26	48	44
	23%	22%	13%	27%	36%	26%	24%	0%	22%	32%	19%	25%	31%	24%	21%	27%	20%
Very Satisfied	256	86	67	40	26	30	6	1	176	23	22	22	14	155	87	91	151
	60%	61%	75%	57%	39%	69%	52%	14%	59%	58%	63%	65%	59%	57%	71%	51%	70%
		d	acdf	d		d									a		a
Don't Know (DO NOT READ OUT)	43	12	6	8	11	2	3	2	37	1	2	1	2	32	6	27	10
	10%	8%	7%	11%	17%	5%	21%	47%	13%	2%	6%	2%	8%	12%	5%	15%	5%
				e			abe		b					b		b	
NET: Satisfied	355	117	79	58	50	42	9	1	241	35	28	30	21	222	113	139	195
	83%	83%	88%	84%	75%	95%	75%	14%	81%	91%	82%	90%	91%	81%	92%	78%	90%
			d			adf									a		a
NET: Dissatisfied	6	3	2	*	-	*	-	*	4	*	1	*	*	3	3	1	4
	1%	2%	2%	1%	0%	0%	0%	3%	1%	1%	4%	0%	1%	1%	3%	1%	2%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 69 (continuation)

Page 581

Availability of a daily collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	441	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	426	175	95	165	410	310	417	359	173	350	310	415	151	335	320
		175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	*	-	-	*	*	*	*	*	-	*	*	*	-	-	*
	*%	-%	-%	*%	*%	*%	*%	*%	-%	*%	*%	*%	-%	-%	*%
Fairly Dissatisfied	6	3	-	3	4	3	4	6	3	4	2	4	4	4	4
	1%	1%	-%	2%	1%	1%	1%	2%	2%	1%	1%	1%	4%	1%	1%
												ab			
Neither Satisfied Nor Dissatisfied	23	12	2	9	18	12	21	17	6	10	13	21	8	16	17
	5%	7%	3%	5%	5%	5%	5%	5%	4%	3%	5%	5%	7%	5%	5%
Fairly Satisfied	99	38	20	41	96	75	99	86	41	88	70	99	36	74	71
	23%	21%	24%	26%	25%	27%	25%	25%	29%	26%	24%	25%	30%	24%	23%
Very Satisfied	256	108	53	91	236	152	240	210	76	204	186	237	65	183	189
	60%	62%	61%	56%	60%	56%	60%	62%	54%	60%	65%	60%	55%	59%	60%
											c				
Don't Know (DO NOT READ OUT)	43	15	11	17	37	31	37	20	15	32	17	37	6	31	33
	10%	8%	12%	11%	9%	12%	9%	6%	11%	9%	6%	9%	5%	10%	11%
						d			d						
NET: Satisfied	355	146	73	132	332	227	338	297	117	292	255	335	101	257	259
	83%	83%	85%	82%	85%	83%	85%	87%	83%	86%	89%	84%	85%	83%	83%
NET: Dissatisfied	6	3	-	3	4	3	4	6	3	4	2	4	4	4	4
	1%	1%	-%	2%	1%	1%	1%	2%	2%	1%	1%	1%	4%	1%	1%
												ab			

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 69 (continuation)

Page 582

Availability of a daily collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	*	-	-	*	*	*	*	*	*	-	-	*	-	-	-	*
	%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	6	-	-	4	6	4	6	4	6	-	2	6	5	*	1	3
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	3%	1%	3%	1%
													a			
Neither Satisfied Nor Dissatisfied	23	*	-	18	23	17	23	17	23	-	14	23	8	1	4	17
	5%	1%	-%	6%	5%	5%	5%	5%	5%	-%	5%	5%	6%	1%	9%	6%
														a		
Fairly Satisfied	99	24	1	65	97	87	97	81	99	-	72	99	42	11	11	78
	23%	32%	13%	21%	23%	23%	23%	22%	23%	-%	26%	24%	29%	15%	22%	26%
		c														
Very Satisfied	256	43	8	194	251	232	253	230	256	-	169	254	80	55	29	173
	60%	58%	68%	63%	60%	62%	60%	64%	60%	-%	61%	60%	55%	78%	59%	56%
														bc		
Don't Know (DO NOT READ OUT)	43	7	2	29	41	36	41	29	43	-	21	39	11	4	4	35
	10%	9%	19%	9%	10%	9%	10%	8%	10%	-%	8%	9%	8%	5%	8%	11%
NET: Satisfied	355	67	9	259	348	318	350	311	355	-	242	353	123	65	39	251
	83%	90%	81%	84%	83%	85%	84%	86%	83%	-%	86%	84%	83%	93%	81%	82%
														bc		
NET: Dissatisfied	6	-	-	4	6	4	6	4	6	-	2	6	5	*	1	3
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	3%	1%	3%	1%
													a			

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Availability of a daily collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	*	-	*	-	*	-	*	-	*	-	*	-	-	*
	*%	-%	*%	-%	*%	-%	*%	-%	*%	-%	*%	-%	-%	2%
Fairly Dissatisfied	6	5	*	*	5	*	6	-	4	-	1	3	3	1
	1%	4%	1%	*%	2%	*%	1%	-%	2%	-%	1%	1%	1%	18%
		c												
Neither Satisfied Nor Dissatisfied	23	7	1	14	14	9	23	-	9	2	4	14	13	1
	5%	5%	3%	6%	5%	7%	5%	-%	3%	6%	3%	6%	3%	8%
Fairly Satisfied	99	37	12	49	77	23	99	-	51	5	30	59	79	2
	23%	27%	28%	21%	25%	19%	24%	-%	20%	17%	22%	23%	21%	28%
Very Satisfied	256	80	27	146	182	74	249	7	164	18	86	157	246	1
	60%	58%	62%	61%	59%	64%	60%	82%	65%	58%	63%	62%	65%	16%
Don't Know (DO NOT READ OUT)	43	9	2	31	32	11	41	2	24	6	15	22	34	2
	10%	7%	5%	13%	10%	9%	10%	18%	10%	19%	11%	9%	9%	28%
NET: Satisfied	355	117	39	195	259	96	348	7	216	23	116	216	326	4
	83%	84%	90%	81%	83%	83%	83%	82%	85%	75%	85%	85%	87%	44%
NET: Dissatisfied	6	5	*	*	6	*	6	-	4	-	2	3	3	2
	1%	4%	1%	*%	2%	*%	1%	-%	2%	-%	1%	1%	1%	20%
		c												

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Availability of a daily collection (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	*	-	*	-	-
	*%	-%	*%	-%	-%
Fairly Dissatisfied	6	2	1	2	1
	1%	2%	1%	2%	1%
Neither Satisfied Nor Dissatisfied	23	6	7	5	5
	5%	5%	6%	5%	5%
Fairly Satisfied	99	26	22	37	14
	23%	23%	19%	37%	15%
Very Satisfied	256	63	80	48	65
	60%	55%	67%	48%	70%
			ac		ac
Don't Know (DO NOT READ OUT)	43	18	9	8	8
	10%	16%	8%	8%	9%
NET: Satisfied	355	89	102	84	79
	83%	78%	86%	85%	85%
NET: Dissatisfied	6	2	1	2	1
	1%	2%	1%	2%	1%

Columns Tested: a,b,c,d

Latest collection time (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%														
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	4	-	-	-	-	-	2	-	2	-	-	-	-	4
	1%	-%	-%	-%	-%	-%	2%	-%	4%	-%	-%	-%	-%	1%
Fairly Dissatisfied	6	2	*	-	*	-	*	2	-	*	1	*	-	4
	1%	7%	1%	-%	1%	-%	3%	4%	-%	1%	5%	3%	-%	1%
										m				
Neither Satisfied Nor Dissatisfied	57	2	8	2	*	6	9	7	11	4	2	3	2	50
	13%	7%	15%	6%	1%	18%	11%	16%	21%	16%	9%	18%	20%	13%
		d	d		d	d	d	d	d			d	d	d
Fairly Satisfied	117	6	14	11	8	9	26	6	13	10	5	6	3	103
	27%	22%	26%	35%	27%	25%	32%	13%	26%	39%	25%	36%	31%	27%
							g					g		
Very Satisfied	202	13	28	13	18	20	37	22	23	11	9	4	4	184
	47%	49%	51%	41%	63%	56%	45%	48%	45%	44%	49%	25%	44%	48%
			k		k	k	k	k			k		k	k
Don't Know (DO NOT READ OUT)	41	4	4	5	3	*	8	9	2	-	2	3	*	35
	10%	15%	8%	17%	9%	1%	9%	20%	4%	-%	11%	18%	5%	9%
							em				e			
NET: Satisfied	319	18	42	24	26	29	63	28	36	21	14	10	7	288
	75%	71%	76%	77%	90%	81%	77%	61%	71%	83%	74%	62%	75%	75%
				gk										
NET: Dissatisfied	10	2	*	-	*	-	2	2	2	*	1	*	-	8
	2%	7%	1%	-%	1%	-%	2%	4%	4%	1%	5%	3%	-%	2%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Latest collection time (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	4	4	-	-	-	-	-	4	-	4	-	2	-	2	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	1%	-%	4%	-%
														b	
Fairly Dissatisfied	6	5	*	*	-	-	1	1	5	6	*	4	1	*	1
	1%	1%	3%	8%	-%	-%	3%	1%	5%	1%	2%	2%	1%	1%	1%
									a						
Neither Satisfied Nor Dissatisfied	57	55	1	*	-	*	1	45	11	56	1	24	15	11	7
	13%	14%	5%	5%	-%	13%	6%	14%	11%	14%	4%	13%	13%	19%	11%
		bf													
Fairly Satisfied	117	108	6	2	1	1	9	86	31	111	6	44	38	21	14
	27%	27%	39%	37%	38%	17%	36%	26%	31%	27%	38%	23%	33%	37%	23%
			a											a	
Very Satisfied	202	190	7	2	1	2	11	162	40	193	9	96	51	19	36
	47%	47%	47%	35%	49%	59%	47%	50%	39%	47%	54%	50%	43%	35%	59%
								b				c			bc
Don't Know (DO NOT READ OUT)	41	39	1	1	*	*	2	27	14	41	*	23	12	2	3
	10%	10%	6%	14%	13%	11%	9%	8%	14%	10%	2%	12%	10%	4%	5%
NET: Satisfied	319	299	12	3	2	3	20	248	71	304	15	140	89	40	51
	75%	74%	86%	73%	87%	76%	82%	76%	70%	74%	91%	72%	76%	72%	82%
			a								a				
NET: Dissatisfied	10	9	*	*	-	-	1	4	5	9	*	6	1	3	1
	2%	2%	3%	8%	-%	-%	3%	1%	5%	2%	2%	3%	1%	5%	1%
									a						

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Page 587

Latest collection time (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	4	4	-	-	-	-	-	-	2	-	2	-	-	2	-	2	-
	1%	3%	-%	-%	-%	-%	-%	-%	1%	-%	6%	-%	-%	1%	-%	1%	-%
											a						
Fairly Dissatisfied	6	4	1	*	-	1	-	*	5	*	-	-	1	5	1	5	1
	1%	3%	1%	1%	-%	1%	-%	5%	2%	*%	-%	-%	2%	2%	1%	3%	1%
Neither Satisfied Nor Dissatisfied	57	11	10	10	16	7	1	1	36	5	4	8	4	41	11	23	29
	13%	8%	12%	15%	24%	16%	5%	32%	12%	12%	13%	23%	18%	15%	9%	13%	13%
					abf												
Fairly Satisfied	117	31	19	25	28	11	4	*	79	16	7	9	6	82	27	58	51
	27%	22%	21%	36%	42%	24%	29%	5%	27%	42%	19%	28%	24%	30%	22%	32%	24%
				ab	abe					ac							
Very Satisfied	202	81	53	23	17	22	6	*	139	16	19	16	12	117	75	70	122
	47%	57%	60%	34%	25%	49%	48%	11%	47%	41%	56%	48%	51%	43%	61%	39%	56%
		cd	cd		d	d	d								a		a
Don't Know (DO NOT READ OUT)	41	10	6	10	6	4	2	2	36	2	2	*	1	27	8	22	13
	10%	7%	7%	15%	9%	10%	18%	47%	12%	5%	6%	1%	4%	10%	7%	12%	6%
																b	
NET: Satisfied	319	112	72	48	45	32	9	1	219	32	26	25	17	199	102	128	173
	75%	79%	81%	69%	67%	73%	77%	16%	74%	83%	75%	76%	75%	73%	83%	71%	80%
															a		a
NET: Dissatisfied	10	8	1	*	-	1	-	*	7	*	2	-	1	7	1	6	1
	2%	6%	1%	1%	-%	1%	-%	5%	2%	*%	6%	-%	2%	3%	1%	4%	1%
		d														b	

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Latest collection time (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	4	-	4	2	4	4	4	-	2	4	4	2	2	2
1%	-%	5%	-%	*%	1%	1%	1%	-%	1%	1%	1%	2%	1%	1%
		ac												
Fairly Dissatisfied	6	4	*	6	2	6	4	1	4	4	6	3	4	4
1%	2%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	3%	1%	1%
Neither Satisfied Nor Dissatisfied	57	21	10	50	31	50	52	24	44	42	50	18	42	40
13%	12%	12%	15%	13%	11%	13%	15%	17%	13%	15%	13%	15%	14%	13%
Fairly Satisfied	117	47	24	113	83	116	97	46	104	83	114	39	89	87
27%	27%	28%	28%	29%	30%	29%	28%	33%	31%	29%	29%	33%	29%	28%
Very Satisfied	202	89	32	185	125	189	164	54	156	138	188	54	143	154
47%	51%	37%	49%	47%	46%	47%	48%	39%	46%	48%	47%	45%	46%	49%
	b						e							
Don't Know (DO NOT READ OUT)	41	13	15	35	29	35	20	15	30	16	35	2	30	27
10%	8%	18%	7%	9%	10%	9%	6%	11%	9%	6%	9%	2%	10%	9%
		ac			d			d			c			
NET: Satisfied	319	137	56	299	208	305	261	101	260	221	302	93	231	241
75%	78%	65%	77%	76%	76%	76%	77%	71%	77%	77%	76%	79%	75%	77%
	b		b											
NET: Dissatisfied	10	4	4	8	6	10	8	1	5	8	10	5	6	6
2%	2%	5%	1%	2%	2%	2%	2%	1%	2%	3%	2%	4%	2%	2%
		c												

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Latest collection time (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	4	2	-	-	4	4	4	4	4	-	4	4	-	-	-	4
	1%	2%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
		c														
Fairly Dissatisfied	6	-	-	6	6	2	6	2	6	-	2	6	1	1	*	5
	1%	-%	-%	2%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	2%
Neither Satisfied Nor Dissatisfied	57	9	*	41	57	48	57	54	57	-	40	57	25	4	11	40
	13%	13%	1%	13%	14%	13%	14%	15%	13%	-%	14%	13%	17%	6%	23% a	13%
Fairly Satisfied	117	21	4	84	115	111	115	94	117	-	83	117	48	21	6	90
	27%	29%	32%	27%	28%	30%	27%	26%	27%	-%	30%	28%	32%	30% b	12%	30% b
Very Satisfied	202	36	5	151	197	177	199	179	202	-	132	200	64	38	28	136
	47%	49%	48%	49%	47%	47%	47%	49%	47%	-%	47%	48%	43%	53%	57%	45%
Don't Know (DO NOT READ OUT)	41	5	2	28	39	34	39	29	41	-	19	37	9	7	4	30
	10%	7%	19%	9%	9%	9%	9%	8%	10%	-%	7%	9%	6%	9%	8%	10%
NET: Satisfied	319	58	9	235	312	288	314	272	319	-	215	317	112	59	33	227
	75%	78%	80%	76%	75%	77%	75%	75%	75%	-%	77%	75%	76%	83%	69%	74%
NET: Dissatisfied	10	2	-	6	10	6	10	6	10	-	6	10	1	1	*	9
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	1%	1%	1%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Latest collection time (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	4	2	-	2	2	2	4	-	2	-	-	2	2	-
	1%	2%	0%	1%	1%	2%	1%	0%	1%	0%	0%	1%	0%	0%
Fairly Dissatisfied	6	1	1	5	5	1	6	-	6	*	3	3	4	1
	1%	0%	1%	2%	1%	1%	1%	0%	2%	0%	2%	1%	1%	8%
Neither Satisfied Nor Dissatisfied	57	21	10	26	44	13	57	-	25	4	13	38	40	1
	13%	15%	22%	11%	14%	11%	14%	0%	10%	13%	9%	15%	11%	18%
Fairly Satisfied	117	43	10	64	87	30	117	-	67	6	37	71	101	2
	27%	31%	22%	26%	28%	26%	28%	0%	27%	18%	27%	28%	27%	28%
Very Satisfied	202	63	22	115	141	61	195	7	128	17	68	123	195	2
	47%	45%	50%	48%	45%	53%	47%	82%	50%	55%	50%	48%	52%	22%
Don't Know (DO NOT READ OUT)	41	9	2	29	32	9	39	2	25	4	17	18	33	2
	10%	7%	5%	12%	10%	8%	9%	18%	10%	13%	12%	7%	9%	24%
NET: Satisfied	319	106	31	178	228	91	312	7	195	23	105	194	297	4
	75%	76%	72%	74%	73%	79%	75%	82%	77%	74%	77%	76%	79%	50%
NET: Dissatisfied	10	3	1	6	7	3	10	-	8	*	3	5	6	1
	2%	2%	1%	3%	2%	3%	2%	0%	3%	0%	2%	2%	2%	8%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 70 (continuation)

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Latest collection time (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	4	2	-	2	-
	1%	2%	-%	2%	-%
Fairly Dissatisfied	6	2	2	1	*
	1%	2%	2%	1%	*%
Neither Satisfied Nor Dissatisfied	57	17	21	10	8
	13%	15%	18%	10%	9%
Fairly Satisfied	117	37	20	38	22
	27%	32%	17%	38%	23%
Very Satisfied	202	b		bd	
	47%	42	65	42	53
		37%	55%	42%	57%
			a		ac
Don't Know (DO NOT READ OUT)	41	15	10	6	10
	10%	13%	9%	6%	11%
NET: Satisfied	319	79	85	80	75
	75%	69%	71%	80%	80%
NET: Dissatisfied	10	4	2	3	*
	2%	4%	2%	3%	*%

Columns Tested: a,b,c,d

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Table 71

Page 592

Account management (if applicable) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%														
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	1	-	*	-	*	-	-	*	-	-	-	-	-	1
	0%	-0%	1%	-0%	1%	-0%	-0%	0%	-0%	-0%	-0%	-0%	-0%	0%
Fairly Dissatisfied	6	-	2	-	-	1	-	-	2	-	*	-	-	6
	1%	-0%	4%	-0%	-0%	4%	-0%	-0%	4%	-0%	1%	-0%	-0%	1%
Neither Satisfied Nor Dissatisfied	16	-	2	-	-	1	6	2	2	1	*	*	*	15
	4%	-0%	4%	-0%	-0%	4%	7%	4%	4%	6%	3%	3%	2%	4%
Fairly Satisfied	45	4	2	9	*	3	11	2	5	4	1	2	2	41
	11%	14%	4%	29%	1%	9%	14%	5%	9%	16%	4%	11%	18%	11%
Very Satisfied	66	7	4	4	7	11	13	9	2	3	4	1	2	60
	15%	28%	7%	12%	23%	30%	16%	20%	5%	11%	19%	6%	16%	16%
Don't Know (DO NOT READ OUT)	293	15	43	18	22	19	52	33	40	17	14	13	6	260
	69%	57%	79%	59%	76%	54%	64%	71%	78%	67%	73%	80%	64%	68%
NET: Satisfied	111	11	7	13	7	14	24	12	7	7	4	3	3	101
	26%	43%	12%	41%	23%	39%	29%	25%	14%	27%	23%	18%	34%	26%
NET: Dissatisfied	6	-	2	-	*	1	-	*	2	-	*	-	-	6
	1%	-0%	4%	-0%	1%	4%	-0%	0%	4%	-0%	1%	-0%	-0%	2%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 71 (continuation) Page 593

Account management (if applicable) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	1	-	*	*	-	-	1	*	*	*	*	-	-	*	1
	%	0%	3%	4%	0%	0%	3%	0%	0%	0%	2%	0%	0%	0%	1%
			a				a				a				
Fairly Dissatisfied	6	6	*	-	-	-	*	6	-	6	-	3	2	-	*
	1%	1%	1%	0%	0%	0%	0%	2%	0%	1%	0%	2%	2%	0%	0%
Neither Satisfied Nor Dissatisfied	16	15	1	-	*	*	1	12	4	14	2	4	2	2	8
	4%	4%	4%	0%	10%	4%	4%	4%	4%	3%	12%	2%	2%	4%	12%
											a				ab
Fairly Satisfied	45	41	3	*	*	*	4	35	10	45	*	16	14	7	8
	11%	10%	22%	5%	17%	4%	16%	11%	10%	11%	3%	8%	12%	13%	13%
			a												
Very Satisfied	66	62	2	1	1	*	4	51	15	63	3	23	19	12	12
	15%	15%	13%	22%	42%	14%	17%	16%	15%	15%	16%	12%	16%	21%	20%
Don't Know (DO NOT READ OUT)	293	278	8	3	1	3	15	221	72	282	11	146	80	34	33
	69%	69%	57%	69%	31%	78%	59%	68%	71%	69%	67%	76%	68%	62%	53%
			bf									cd	d		
NET: Satisfied	111	103	5	1	1	1	8	85	26	108	3	39	32	19	20
	26%	26%	35%	27%	60%	18%	33%	26%	25%	26%	19%	20%	26%	34%	33%
														a	a
NET: Dissatisfied	6	6	1	*	-	-	1	6	*	6	*	3	2	*	1
	1%	1%	4%	4%	0%	0%	3%	2%	0%	1%	2%	2%	2%	0%	1%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 71 (continuation)

Page 594

Account management (if applicable) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	1	-	-	-	-	*	-	*	*	-	-	-	1	1	-	*	1
	%	-	-	-	-	1%	-	5%	%	-	-	-	2%	%	-	%	%
													a				
Fairly Dissatisfied	6	2	-	1	-	2	-	-	6	-	-	-	*	6	*	1	4
	1%	2%	-	2%	-	5%	-	-	2%	-	-	-	%	2%	%	1%	2%
						b											
Neither Satisfied Nor Dissatisfied	16	3	1	8	4	*	*	*	7	*	6	2	2	10	5	3	13
	4%	2%	1%	11%	7%	%	2%	3%	2%	%	17%	6%	7%	4%	4%	1%	6%
				abe	b						ab						a
Fairly Satisfied	45	17	8	4	11	4	1	-	25	4	7	5	5	23	20	10	34
	11%	12%	9%	6%	16%	8%	7%	-	8%	10%	19%	15%	21%	9%	16%	5%	15%
											a		a		a		a
Very Satisfied	66	15	13	10	8	14	4	2	36	8	8	6	8	35	30	19	46
	15%	11%	14%	14%	12%	31%	36%	58%	12%	20%	22%	19%	37%	13%	25%	11%	21%
						abcd	abcd						a		a		a
Don't Know (DO NOT READ OUT)	293	104	68	46	43	24	7	1	224	27	14	20	7	199	67	147	120
	69%	74%	76%	66%	65%	54%	55%	35%	75%	69%	41%	61%	32%	73%	55%	82%	55%
		ef	ef						ce	ce		e		b		b	
NET: Satisfied	111	32	21	14	19	17	5	2	61	12	14	11	13	58	50	29	79
	26%	23%	23%	21%	28%	39%	43%	58%	20%	31%	42%	33%	58%	21%	41%	16%	37%
						abc	abc				a		abd		a		a
NET: Dissatisfied	6	2	-	1	-	3	-	*	6	-	-	-	1	6	*	1	5
	1%	2%	-	2%	-	6%	-	5%	2%	-	-	-	3%	2%	%	1%	2%
						bd											

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 71 (continuation)

Page 595

Account management (if applicable) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	1	-	1	1	1	1	1	*	*	1	1	*	1	1
*%	-%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
Fairly Dissatisfied	6	2	2	6	6	6	6	3	4	4	6	4	6	6
1%	1%	2%	1%	1%	2%	1%	2%	2%	1%	1%	1%	4%	2%	2%
Neither Satisfied Nor Dissatisfied	16	7	9	16	12	16	13	9	16	14	16	7	15	11
4%	4%	5%	5%	4%	4%	4%	4%	7%	5%	5%	4%	6%	5%	4%
Fairly Satisfied	45	b	b	43	30	43	38	14	37	37	41	17	33	33
11%	23	7	15	11%	11%	11%	11%	10%	11%	13%	10%	14%	11%	11%
Very Satisfied	66	23	23	60	37	60	53	22	49	51	59	13	48	49
15%	13%	17	15%	15%	14%	15%	16%	15%	15%	18%	15%	11%	16%	16%
Don't Know (DO NOT READ OUT)	293	120	111	266	188	275	229	93	233	181	275	77	207	214
69%	69%	70%	69%	68%	69%	69%	67%	66%	69%	63%	69%	65%	67%	68%
NET: Satisfied	111	46	39	104	67	104	91	36	86	88	100	30	81	82
26%	26%	24	24%	26%	25%	26%	27%	25%	25%	31%	25%	26%	26%	26%
NET: Dissatisfied	6	2	3	6	6	6	6	4	4	4	6	4	6	6
1%	1%	2%	2%	2%	2%	2%	2%	3%	1%	1%	2%	4%	2%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 71 (continuation)

Page 596

Account management (if applicable) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	1	-	-	1	1	1	1	1	1	-	1	1	*	*	*	*
%		-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
Fairly Dissatisfied	6	-	-	6	6	6	6	4	6	-	4	6	2	*	-	6
%	1%	-%	-%	2%	1%	2%	1%	1%	1%	-%	1%	1%	1%	1%	-%	2%
Neither Satisfied Nor Dissatisfied	16	4	2	9	16	14	16	12	16	-	8	16	6	2	2	12
%	4%	5%	19%	3%	4%	4%	4%	3%	4%	-%	3%	4%	4%	3%	4%	4%
Fairly Satisfied	45	10	1	32	45	43	45	45	45	-	37	45	17	8	10	28
%	11%	14%	12%	10%	11%	11%	11%	12%	11%	-%	13%	11%	12%	12%	20%	9%
Very Satisfied	66	14	2	51	66	60	66	63	66	-	51	64	26	18	11	37
%	15%	19%	15%	16%	16%	16%	16%	17%	15%	-%	18%	15%	18%	26%	22%	12%
Don't Know (DO NOT READ OUT)	293	46	6	212	284	253	286	238	293	-	179	289	95	42	26	223
%	69%	62%	54%	68%	68%	67%	68%	66%	69%	-%	64%	69%	64%	59%	54%	73%
NET: Satisfied	111	24	3	83	111	103	111	108	111	-	88	109	44	26	20	65
%	26%	33%	27%	27%	27%	27%	26%	30%	26%	-%	32%	26%	30%	37%	42%	21%
NET: Dissatisfied	6	-	-	6	6	6	6	4	6	-	4	6	2	*	*	6
%	1%	-%	-%	2%	2%	2%	2%	1%	1%	-%	1%	1%	2%	1%	1%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 71 (continuation)

Page 597

Account management (if applicable) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	253	31	137	255	376	8
Very Dissatisfied	1	-	1	-	*	*	1	-	-	*	*	-	*
	*%	-%	2%	-%	*%	*%	*%	-%	-%	*%	*%	-%	4%
		c											
Fairly Dissatisfied	6	6	-	-	6	-	6	-	-	*	6	3	*
	1%	4%	-%	-%	2%	-%	1%	-%	-%	*%	2%	1%	1%
		c											
Neither Satisfied Nor Dissatisfied	16	7	2	6	14	2	16	-	*	2	13	11	*
	4%	5%	5%	3%	4%	2%	4%	-%	2%	2%	5%	3%	2%
Fairly Satisfied	45	13	12	20	35	10	43	2	2	8	34	44	-
	11%	9%	27%	8%	11%	8%	10%	21%	7%	6%	13%	12%	-%
			ac								a		
Very Satisfied	66	26	8	31	47	19	66	-	5	31	34	62	-
	15%	19%	19%	13%	15%	16%	16%	-%	15%	23%	13%	17%	-%
										b			
Don't Know (DO NOT READ OUT)	293	86	21	182	208	85	286	7	172	94	169	255	7
	69%	62%	48%	76%	67%	73%	68%	79%	68%	69%	66%	68%	93%
				ab									
NET: Satisfied	111	40	20	51	82	29	109	2	7	39	68	107	-
	26%	28%	46%	21%	27%	25%	26%	21%	22%	29%	27%	28%	-%
			ac										
NET: Dissatisfied	6	6	1	-	6	*	6	-	-	1	6	3	*
	1%	4%	2%	-%	2%	*%	2%	-%	-%	*%	2%	1%	5%
		c	c										

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 71 (continuation)

Page 598

Account management (if applicable) (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	1	1	*	-	-
	*%	*%	*%	-%	-%
Fairly Dissatisfied	6	-	6	-	*
	1%	-%	5%	-%	*%
			ac		
Neither Satisfied Nor Dissatisfied	16	6	1	5	4
	4%	5%	1%	5%	4%
		b		b	
Fairly Satisfied	45	10	11	12	12
	11%	9%	9%	12%	13%
Very Satisfied	66	17	21	16	12
	15%	15%	17%	16%	13%
Don't Know (DO NOT READ OUT)	293	81	81	66	65
	69%	71%	68%	66%	69%
NET: Satisfied	111	27	31	28	24
	26%	24%	26%	28%	26%
NET: Dissatisfied	6	1	6	-	*
	1%	*%	5%	-%	*%
			ac		

Columns Tested: a,b,c,d

Trustworthiness of the provider (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%														
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	3	-	-	-	*	-	-	-	2	-	-	*	-	2
	1%	-%	-%	-%	1%	-%	-%	-%	4%	-%	-%	3%	-%	1%
Fairly Dissatisfied	7	-	-	-	1	1	2	2	-	-	*	-	-	6
	2%	-%	-%	-%	4%	4%	2%	4%	-%	-%	1%	-%	-%	2%
Neither Satisfied Nor Dissatisfied	29	*	5	5	1	5	4	-	6	1	*	*	*	28
	7%	1%	8%	17%	5%	15%	5%	-%	12%	5%	3%	3%	2%	7%
						gi			9					
Fairly Satisfied	134	8	9	11	7	7	30	15	19	14	5	5	3	120
	31%	29%	17%	36%	23%	19%	36%	33%	38%	55%	28%	31%	32%	32%
							b							
Very Satisfied	246	18	40	13	18	22	45	27	23	10	13	10	6	217
	58%	70%	74%	41%	62%	63%	54%	59%	45%	40%	68%	57%	65%	57%
			h								h			
Don't Know (DO NOT READ OUT)	8	-	*	2	1	-	2	2	-	-	-	1	-	7
	2%	-%	1%	6%	4%	-%	2%	4%	-%	-%	-%	6%	-%	2%
NET: Satisfied	379	26	50	24	25	29	75	43	43	24	18	15	9	337
	89%	99%	91%	77%	85%	82%	91%	92%	83%	95%	97%	88%	98%	88%
											eh		e	
NET: Dissatisfied	9	-	-	-	1	1	2	2	2	-	*	*	-	9
	2%	-%	-%	-%	5%	4%	2%	4%	4%	-%	1%	3%	-%	2%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 72 (continuation)

Page 600

Trustworthiness of the provider (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	3	3	-	*	-	-	*	2	*	3	-	-	*	2	*
	1%	1%	-%	4%	-%	-%	1%	1%	*%	1%	-%	-%	*%	4%	*%
														a	
Fairly Dissatisfied	7	6	*	-	-	*	*	7	-	6	*	3	2	*	2
	2%	2%	2%	-%	-%	4%	2%	2%	-%	2%	1%	1%	2%	*%	3%
Neither Satisfied Nor Dissatisfied	29	28	1	*	-	-	1	22	7	27	2	9	8	7	5
	7%	7%	5%	7%	-%	-%	4%	7%	7%	7%	12%	4%	7%	13%	8%
														a	
Fairly Satisfied	134	125	6	1	1	1	9	98	36	131	3	60	28	22	24
	31%	31%	41%	29%	40%	26%	37%	30%	35%	32%	18%	31%	24%	39%	38%
														b	
Very Satisfied	246	232	7	2	1	2	13	187	58	235	11	115	75	24	31
	58%	58%	51%	50%	60%	66%	54%	58%	57%	57%	66%	60%	65%	44%	50%
												c	cd		
Don't Know (DO NOT READ OUT)	8	8	*	*	-	*	1	8	*	8	*	6	3	*	*
	2%	2%	1%	10%	-%	4%	3%	3%	*%	2%	3%	3%	2%	*%	*%
NET: Satisfied	379	357	13	4	2	3	22	285	94	365	14	176	104	46	54
	89%	89%	93%	79%	100%	92%	91%	88%	92%	89%	85%	91%	89%	83%	88%
NET: Dissatisfied	9	9	*	*	-	*	1	9	*	9	*	3	2	2	2
	2%	2%	2%	4%	-%	4%	2%	3%	*%	2%	1%	1%	2%	4%	4%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 72 (continuation)

Page 601

Trustworthiness of the provider (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)
Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	3	3	-	-	-	-	-	*	*	-	2	-	*	*	*	-	1
	1%	2%	-%	-%	-%	-%	-%	5%	*%	-%	6%	-%	1%	*%	*%	-%	*%
										a							
Fairly Dissatisfied	7	2	1	1	2	*	-	-	3	1	2	-	*	2	2	*	4
	2%	1%	2%	2%	3%	1%	-%	-%	1%	3%	5%	-%	1%	1%	2%	*%	2%
Neither Satisfied Nor Dissatisfied	29	2	8	6	4	6	3	1	23	1	-	4	1	27	2	22	7
	7%	1%	9%	8%	6%	14%	22%	32%	8%	2%	-%	13%	6%	10%	2%	12%	3%
			a	a		a	abd					c		b		b	
Fairly Satisfied	134	50	13	22	33	12	2	2	86	11	15	11	10	86	37	57	67
	31%	35%	14%	32%	49%	27%	20%	47%	29%	28%	45%	34%	45%	31%	31%	32%	31%
		b		b	bcef												
Very Satisfied	246	83	65	40	24	26	7	1	177	25	15	18	11	153	80	97	136
	58%	59%	73%	58%	37%	58%	56%	16%	59%	65%	44%	53%	47%	56%	65%	54%	63%
		d	acd	d		d											
Don't Know (DO NOT READ OUT)	8	2	2	*	3	-	*	-	8	*	-	-	-	6	*	4	2
	2%	2%	2%	1%	5%	-%	2%	-%	3%	1%	-%	-%	-%	2%	*%	2%	1%
NET: Satisfied	379	132	78	62	57	38	9	3	263	36	30	29	21	239	117	153	203
	89%	94%	87%	89%	86%	86%	76%	63%	88%	94%	89%	87%	92%	87%	96%	86%	94%
		f													a		a
NET: Dissatisfied	9	4	1	1	2	*	-	*	4	1	4	-	*	2	2	*	4
	2%	3%	2%	2%	3%	1%	-%	5%	1%	3%	11%	-%	2%	1%	2%	*%	2%
											ad						

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 72 (continuation)

Page 602

Trustworthiness of the provider (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	3	2	1	1	2	3	3	*	1	3	3	1	1	1
1%	-%	2%	*%	*%	1%	1%	1%	*%	*%	1%	1%	1%	*%	*%
	a													
Fairly Dissatisfied	7	3	2	7	5	7	5	3	5	4	7	-	5	5
2%	2%	2%	1%	2%	2%	2%	2%	2%	2%	1%	2%	-%	2%	2%
Neither Satisfied Nor Dissatisfied	29	9	3	29	24	29	21	21	25	15	29	6	26	28
7%	5%	4%	11%	7%	9%	7%	6%	15%	7%	5%	7%	5%	8%	9%
							abcd							
Fairly Satisfied	134	63	20	126	85	128	116	46	110	102	127	48	97	103
31%	36%	23%	31%	32%	31%	32%	34%	32%	32%	35%	32%	40%	31%	33%
	b													
Very Satisfied	246	95	57	221	151	226	190	70	190	163	224	63	175	172
58%	55%	67%	56%	57%	55%	56%	56%	50%	56%	57%	56%	53%	57%	55%
Don't Know (DO NOT READ OUT)	8	4	2	8	6	8	5	*	8	1	8	1	6	5
2%	2%	2%	1%	2%	2%	2%	1%	*%	2%	*%	2%	1%	2%	2%
NET: Satisfied	379	158	77	347	236	354	306	116	299	265	351	111	272	275
89%	91%	90%	86%	89%	86%	88%	90%	82%	88%	92%	88%	94%	88%	88%
				e			e							
NET: Dissatisfied	9	3	3	7	8	9	8	3	6	7	9	1	6	6
2%	2%	4%	2%	2%	3%	2%	2%	2%	2%	2%	2%	1%	2%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 72 (continuation)

Page 603

Trustworthiness of the provider (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	3	-	-	1	3	3	3	3	3	-	3	3	1	1	-	2
	1%	-%	-%	*%	1%	1%	1%	1%	1%	-%	1%	1%	*%	1%	-%	1%
Fairly Dissatisfied	7	2	-	3	7	5	7	5	7	-	5	7	*	1	3	2
	2%	2%	-%	1%	2%	1%	2%	1%	2%	-%	2%	2%	*%	2%	6%	1%
															c	
Neither Satisfied Nor Dissatisfied	29	3	5	23	29	26	29	26	29	-	15	29	7	6	2	21
	7%	4%	47%	7%	7%	7%	7%	7%	7%	-%	5%	7%	5%	8%	5%	7%
Fairly Satisfied	134	26	*	94	130	124	132	117	134	-	101	132	59	19	14	101
	31%	35%	1%	30%	31%	33%	31%	32%	31%	-%	36%	31%	40%	27%	28%	33%
													b			
Very Satisfied	246	43	6	184	240	212	240	204	245	-	151	242	78	43	30	171
	58%	58%	52%	59%	58%	56%	57%	57%	58%	-%	54%	58%	53%	61%	61%	56%
Don't Know (DO NOT READ OUT)	8	1	-	5	8	7	8	6	8	-	4	8	3	-	-	8
	2%	1%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	2%	-%	-%	3%
NET: Satisfied	379	69	6	278	370	336	372	321	379	-	253	374	137	63	43	272
	89%	93%	53%	90%	89%	89%	89%	89%	89%	-%	90%	89%	93%	89%	89%	89%
NET: Dissatisfied	9	2	-	4	9	8	9	8	9	-	8	9	1	2	3	4
	2%	2%	-%	1%	2%	2%	2%	2%	2%	-%	3%	2%	1%	3%	6%	1%
															c	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 72 (continuation)

Page 604

Trustworthiness of the provider (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	3	3	*	-	2	1	3	-	1	-	*	*	-	1
	1%	2%	%	-%	1%	1%	1%	-%	%	-%	%	%	-%	8%
		c												
Fairly Dissatisfied	7	2	3	1	5	2	7	-	5	-	2	4	-	*
	2%	1%	8%	1%	2%	2%	2%	-%	2%	-%	1%	1%	-%	5%
			ac											
Neither Satisfied Nor Dissatisfied	29	11	1	17	22	7	29	-	15	2	7	22	13	5
	7%	8%	3%	7%	7%	6%	7%	-%	6%	6%	5%	9%	4%	65%
Fairly Satisfied	134	48	13	72	105	28	132	2	68	10	39	81	120	*
	31%	34%	30%	30%	34%	24%	32%	21%	27%	31%	29%	32%	32%	6%
Very Satisfied	246	76	26	141	174	71	239	6	160	19	84	146	241	1
	58%	55%	59%	59%	56%	62%	57%	73%	63%	63%	62%	57%	64%	16%
Don't Know (DO NOT READ OUT)	8	-	-	8	2	6	8	*	4	*	4	3	2	-
	2%	-%	-%	3%	1%	5%	2%	6%	2%	%	3%	1%	1%	-%
				a		a								
NET: Satisfied	379	123	39	214	280	100	371	8	228	29	124	227	361	2
	89%	89%	89%	89%	90%	86%	89%	94%	90%	94%	90%	89%	96%	22%
NET: Dissatisfied	9	5	4	1	7	2	9	-	6	-	2	4	-	1
	2%	3%	8%	1%	2%	2%	2%	-%	2%	-%	1%	1%	-%	13%
		c	c											

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 72 (continuation)

Page 605

Trustworthiness of the provider (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	3	*	-	3	-
1%		*%	-%	3%	-%
Fairly Dissatisfied	7	2	*	-	4
2%		2%	*%	-%	5%
					bc
Neither Satisfied Nor Dissatisfied	29	13	9	3	5
7%		11%	7%	3%	6%
		c			
Fairly Satisfied	134	37	27	47	23
31%		32%	23%	47%	24%
				abd	
Very Satisfied	246	60	81	43	61
58%		53%	68%	43%	65%
			ac		c
Don't Know (DO NOT READ OUT)	8	3	2	4	-
2%		2%	2%	4%	-%
NET: Satisfied	379	97	108	90	84
89%		85%	91%	91%	90%
NET: Dissatisfied	9	2	*	3	4
2%		2%	*%	3%	5%
					b

Columns Tested: a,b,c,d

Amount / level of lost mail (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	441	19	36	23	32	40	67	38	30	27	52	45	32	312
Weighted total	426	26	55	31	29	35	82	47	51	25	19	17	9	381
Very Dissatisfied	3	-	-	2	*	*	-	-	*	-	*	-	-	2
	1%	-%	-%	6%	1%	1%	-%	-%	1%	-%	1%	-%	-%	1%
Fairly Dissatisfied	8	-	-	-	1	1	4	-	-	1	-	-	*	7
	2%	-%	-%	-%	4%	4%	4%	-%	-%	5%	-%	-%	5%	2%
Neither Satisfied Nor Dissatisfied	28	2	4	2	1	-	5	-	11	1	*	-	1	27
	6%	7%	8%	6%	5%	-%	7%	-%	21%	6%	1%	-%	7%	7%
Fairly Satisfied	95	6	8	6	7	12	17	5	19	5	5	3	2	84
	22%	22%	14%	18%	25%	33%	21%	10%	38%	21%	29%	19%	26%	22%
Very Satisfied	276	16	39	20	18	22	52	40	21	17	13	12	6	245
	65%	64%	71%	65%	61%	63%	64%	86%	41%	67%	70%	72%	61%	64%
			h				h	defhlm			h	h		h
Don't Know (DO NOT READ OUT)	17	2	4	2	1	-	4	2	-	-	-	2	-	15
	4%	7%	8%	6%	4%	-%	5%	4%	-%	-%	-%	9%	-%	4%
			j									j		
NET: Satisfied	371	22	46	26	25	34	69	45	40	22	18	15	8	330
	87%	86%	85%	83%	85%	96%	84%	96%	79%	89%	99%	91%	88%	86%
					h		h	h			bdfhim			
NET: Dissatisfied	11	-	-	2	1	1	4	-	*	1	*	-	*	10
	2%	-%	-%	6%	5%	4%	4%	-%	1%	5%	1%	-%	5%	3%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 73 (continuation) Page 607

Amount / level of lost mail (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
Very Dissatisfied	3	2	1	*	-	-	1	2	*	3	-	*	*	2	*
	1%	1%	4%	4%	-%	-%	3%	1%	1%	1%	-%	1%	1%	3%	1%
			a				a							a	
Fairly Dissatisfied	8	8	-	-	-	-	-	7	*	6	2	1	1	3	2
	2%	2%	-%	-%	-%	-%	-%	2%	1%	2%	11%	1%	1%	6%	4%
											a			a	
Neither Satisfied Nor Dissatisfied	28	27	*	*	*	-	1	25	2	27	*	7	2	8	10
	6%	7%	2%	6%	5%	-%	3%	8%	2%	7%	1%	4%	2%	14%	16%
								b						ab	ab
Fairly Satisfied	95	88	5	2	1	1	8	66	29	93	3	40	30	12	14
	22%	22%	32%	42%	37%	17%	32%	20%	29%	23%	16%	21%	26%	21%	23%
			a				a								
Very Satisfied	276	262	9	2	1	3	14	210	66	264	12	133	78	31	34
	65%	65%	60%	42%	58%	75%	59%	65%	65%	65%	71%	69%	67%	55%	56%
												d			
Don't Know (DO NOT READ OUT)	17	16	*	*	-	*	1	13	4	16	*	11	4	*	1
	4%	4%	1%	6%	-%	8%	3%	4%	4%	4%	2%	6%	4%	1%	1%
NET: Satisfied	371	349	13	4	2	3	22	276	95	357	14	173	109	42	48
	87%	87%	93%	83%	95%	92%	91%	85%	93%	87%	87%	90%	93%	77%	78%
									a			cd	cd		
NET: Dissatisfied	11	10	1	*	-	-	1	10	1	9	2	2	1	5	3
	2%	2%	4%	4%	-%	-%	3%	3%	1%	2%	11%	1%	1%	9%	4%
											a			ab	

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 73 (continuation)

Page 608

Amount / level of lost mail (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Very Dissatisfied	3	-	2	*	-	*	-	*	2	-	-	*	*	2	*	2	1
	1%	-%	2%	*%	-%	*%	-%	5%	1%	-%	-%	1%	1%	1%	*%	1%	*%
Fairly Dissatisfied	8	1	-	1	2	4	-	-	4	1	2	-	-	5	1	4	3
	2%	1%	-%	2%	3%	8%	-%	-%	1%	3%	7%	-%	-%	2%	1%	2%	1%
						ab					a						
Neither Satisfied Nor Dissatisfied	28	2	7	2	10	6	-	*	9	3	1	10	4	16	10	11	16
	6%	2%	8%	3%	16%	12%	-%	3%	3%	8%	4%	30%	19%	6%	8%	6%	7%
			a		act	af						abc	a				
Fairly Satisfied	95	30	14	19	17	9	6	1	63	8	11	3	11	61	25	41	45
	22%	21%	15%	27%	25%	20%	49%	32%	21%	20%	31%	9%	48%	22%	21%	23%	21%
						abcde					d		abd				
Very Satisfied	276	100	64	46	34	24	6	2	202	26	20	20	7	178	81	115	145
	65%	71%	72%	66%	51%	53%	47%	61%	68%	68%	58%	60%	33%	65%	66%	64%	67%
		def	def						e	e	e	e					
Don't Know (DO NOT READ OUT)	17	8	2	1	3	3	*	-	16	*	-	-	-	10	4	8	7
	4%	6%	2%	1%	5%	6%	3%	-%	5%	1%	-%	-%	-%	4%	3%	4%	3%
NET: Satisfied	371	130	78	65	51	33	12	4	266	34	30	23	18	239	107	156	191
	87%	92%	87%	94%	77%	73%	97%	93%	89%	88%	90%	69%	80%	88%	87%	87%	88%
		de	e	de		de			d	d	d						
NET: Dissatisfied	11	1	2	1	2	4	-	*	7	1	2	*	*	8	2	5	4
	2%	1%	2%	2%	3%	8%	-%	5%	2%	3%	7%	1%	1%	3%	1%	3%	2%
						a											

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 73 (continuation)

Page 609

Amount / level of lost mail (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	441	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	426	175	95	165	410	310	417	359	173	350	310	415	151	335	320
		175	86	161	391	273	400	340	141	338	288	397	119	310	313
Very Dissatisfied	3	*	2	*	3	3	3	3	2	2	2	3	1	3	2
	1%	%	2%	%	1%	1%	1%	1%	2%	1%	1%	1%	%	1%	1%
Fairly Dissatisfied	8	-	3	5	8	5	8	7	6	8	7	8	*	6	4
	2%	-%	3%	3%	2%	2%	2%	2%	4%	2%	2%	2%	%	2%	1%
			a	a											
Neither Satisfied Nor Dissatisfied	28	8	*	20	26	20	28	25	13	24	17	28	13	25	27
	6%	4%	%	12%	7%	7%	7%	7%	9%	7%	6%	7%	11%	8%	9%
			ab												
Fairly Satisfied	95	31	24	38	90	69	93	83	37	80	74	92	29	68	74
	22%	18%	28%	24%	23%	25%	23%	24%	26%	24%	26%	23%	24%	22%	24%
Very Satisfied	276	129	50	94	253	168	257	214	78	214	182	255	73	195	196
	65%	74%	58%	59%	65%	61%	64%	63%	55%	63%	63%	64%	62%	63%	63%
		bc			e		e								
Don't Know (DO NOT READ OUT)	17	6	8	3	12	8	12	9	4	10	5	12	3	12	9
	4%	3%	9%	2%	3%	3%	3%	3%	3%	3%	2%	3%	2%	4%	3%
			c												
NET: Satisfied	371	161	73	133	343	237	350	297	115	294	257	347	102	263	271
	87%	92%	85%	82%	88%	87%	87%	87%	82%	87%	89%	87%	86%	85%	86%
		c													
NET: Dissatisfied	11	*	5	6	11	8	11	9	8	10	9	11	1	9	7
	2%	%	5%	4%	3%	3%	3%	3%	6%	3%	3%	3%	1%	3%	2%
			a	a											

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 73 (continuation)

Page 610

Amount / level of lost mail (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	441	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	-	280	421	147	70	49	306
Very Dissatisfied	3	-	-	3	3	3	3	3	3	-	3	3	1	*	2	1
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	4%	1%
Fairly Dissatisfied	8	2	2	3	8	7	8	8	8	-	8	8	2	2	1	5
	2%	2%	16%	1%	2%	2%	2%	2%	2%	-%	3%	2%	2%	3%	3%	2%
Neither Satisfied Nor Dissatisfied	28	4	-	24	28	25	28	22	28	-	17	28	9	7	1	19
	6%	5%	-%	8%	7%	7%	7%	6%	6%	-%	6%	7%	6%	10%	3%	6%
Fairly Satisfied	95	20	4	65	94	87	94	84	95	-	75	95	36	15	11	70
	22%	26%	32%	21%	22%	23%	22%	23%	22%	-%	27%	23%	25%	21%	22%	23%
Very Satisfied	276	44	6	206	271	239	271	229	276	-	165	271	93	42	33	199
	65%	60%	52%	66%	65%	64%	65%	63%	65%	-%	59%	64%	63%	60%	68%	65%
Don't Know (DO NOT READ OUT)	17	4	-	10	14	15	17	16	17	-	12	17	7	4	*	11
	4%	6%	-%	3%	3%	4%	4%	4%	4%	-%	4%	4%	5%	6%	1%	4%
NET: Satisfied	371	64	9	271	364	325	364	313	371	-	240	366	129	57	44	270
	87%	87%	84%	87%	87%	87%	87%	87%	87%	-%	86%	87%	89%	81%	90%	88%
NET: Dissatisfied	11	2	2	6	11	10	11	11	11	-	11	11	3	2	3	5
	2%	2%	16%	2%	3%	3%	3%	3%	2%	-%	4%	3%	2%	3%	6%	2%
															c	

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 73 (continuation)

Page 611

Amount / level of lost mail (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
Very Dissatisfied	3	2	*	*	2	*	3	-	*	2	2	1	1	2
	1%	2%	%	%	1%	%	1%	-%	%	6%	1%	%	%	26%
										a				
Fairly Dissatisfied	8	3	-	5	8	-	8	-	7	-	-	7	3	-
	2%	2%	-%	2%	3%	-%	2%	-%	3%	-%	-%	3%	1%	-%
Neither Satisfied Nor Dissatisfied	28	8	5	14	20	8	28	-	14	2	9	19	14	-
	6%	6%	12%	6%	6%	7%	7%	-%	6%	8%	7%	7%	4%	-%
Fairly Satisfied	95	35	13	48	73	22	95	*	52	4	25	61	80	4
	22%	25%	29%	20%	24%	19%	23%	6%	21%	13%	19%	24%	21%	46%
Very Satisfied	276	87	26	161	196	80	268	8	171	19	91	163	269	2
	65%	63%	58%	67%	63%	69%	64%	89%	68%	60%	67%	64%	71%	28%
Don't Know (DO NOT READ OUT)	17	4	-	12	11	6	16	*	8	4	9	5	10	-
	4%	3%	-%	5%	3%	5%	4%	6%	3%	13%	7%	2%	3%	-%
										a	b			
NET: Satisfied	371	122	38	209	270	102	363	8	223	23	117	224	348	6
	87%	87%	87%	87%	87%	88%	87%	94%	88%	73%	85%	88%	93%	74%
NET: Dissatisfied	11	5	*	5	10	*	11	-	7	2	2	7	3	2
	2%	4%	%	2%	3%	%	3%	-%	3%	6%	1%	3%	1%	26%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 73 (continuation)

Page 612

Amount / level of lost mail (QOP2. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
Very Dissatisfied	3	2	*	*	*
	1%	2%	*%	*%	*%
Fairly Dissatisfied	8	5	-	2	1
	2%	4%	-%	2%	1%
		b			
Neither Satisfied Nor Dissatisfied	28	2	7	10	9
	6%	2%	6%	10%	9%
			a	a	
Fairly Satisfied	95	31	22	19	23
	22%	27%	18%	20%	25%
Very Satisfied	276	70	88	62	56
	65%	61%	74%	62%	60%
			ad		
Don't Know (DO NOT READ OUT)	17	4	2	6	4
	4%	4%	2%	6%	4%
NET: Satisfied	371	101	110	81	79
	87%	88%	92%	82%	85%
			c		
NET: Dissatisfied	11	7	*	2	1
	2%	6%	*%	2%	2%
		b			

Columns Tested: a,b,c,d

Table 74

Daily delivery (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%													
Unweighted total	186	9	17	11	13	17	28	8	14	12	23	16	129
Weighted total	193	13	25	20	12	14	35	13	24	12	10	7	169
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	1	-	-	-	1	-	-	-	-	-	-	-	1
	1%	-%	-%	-%	9%	-%	-%	-%	-%	-%	-%	-%	1%
Neither Satisfied Nor Dissatisfied	13	2	4	-	-	-	2	-	2	1	*	1	11
	7%	14%	17%	-%	-%	-%	5%	-%	9%	11%	1%	13%	9%
Fairly Satisfied	60	2	5	7	3	3	13	2	11	8	*	4	53
	31%	16%	18%	36%	24%	22%	36%	14%	45%	64%	5%	53%	37%
Very Satisfied	94	7	14	9	8	8	17	9	9	2	7	1	83
	49%	56%	54%	45%	64%	57%	48%	71%	38%	15%	70%	20%	47%
Don't Know (DO NOT READ OUT)	24	2	3	4	1	2	4	2	2	1	2	1	20
	13%	14%	11%	18%	12%	12%	11%	15%	9%	11%	24%	15%	12%
NET: Satisfied	154	9	18	16	11	11	30	11	20	10	7	5	136
	80%	72%	72%	82%	88%	79%	84%	85%	83%	79%	75%	72%	84%
NET: Dissatisfied	1	-	-	-	1	-	-	-	-	-	-	-	1
	1%	-%	-%	-%	9%	-%	-%	-%	-%	-%	-%	-%	1%

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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Table 74 (continuation)

Page 614

Daily delivery (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	186	141	21	9	5	10	45	126	60	171	15	73	50	21	42
Weighted total	193	184	4	2	1	2	8	145	48	189	4	86	50	20	37
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	1	1	-	-	-	-	-	1	-	1	-	1	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	2%	-%	-%	-%
Neither Satisfied Nor Dissatisfied	13	13	*	-	-	-	*	10	3	13	*	7	1	-	5
	7%	7%	5%	-%	-%	-%	3%	7%	6%	7%	3%	9%	2%	-%	12%
Fairly Satisfied	60	58	1	1	*	*	2	45	15	60	*	19	18	12	11
	31%	31%	23%	41%	31%	22%	27%	31%	32%	32%	8%	22%	36%	62%	29%
Very Satisfied	94	90	2	1	*	1	4	73	21	92	3	44	25	5	19
	49%	49%	53%	52%	12%	45%	47%	50%	44%	49%	62%	52%	50%	27%	52%
Don't Know (DO NOT READ OUT)	24	22	1	*	1	1	2	16	8	23	1	14	6	2	2
	13%	12%	18%	7%	57%	32%	23%	11%	18%	12%	27%	16%	12%	12%	6%
NET: Satisfied	154	148	3	2	*	1	6	118	37	151	3	63	43	18	30
	80%	80%	76%	93%	43%	68%	74%	81%	77%	80%	70%	74%	86%	88%	82%
NET: Dissatisfied	1	1	-	-	-	-	-	1	-	1	-	1	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	2%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 74 (continuation)

Page 615

Daily delivery (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	*d	*e	*f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	186	66	36	23	26	26	9	-	124	19	15	14	14	107	57	67	97
Weighted total	193	77	38	26	26	24	2	-	130	20	18	17	8	105	65	64	106
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	-	-
	1%	-%	-%	5%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
Neither Satisfied Nor Dissatisfied	13	4	2	*	6	1	-	-	4	3	2	4	*	10	2	6	7
	7%	5%	5%	2%	23%	3%	-%	-%	3%	13%	13%	23%	1%	10%	4%	10%	6%
Fairly Satisfied	60	25	6	11	10	7	1	-	39	7	5	8	1	30	21	19	32
	31%	32%	17%	44%	38%	30%	37%	-%	30%	33%	30%	48%	17%	28%	33%	29%	30%
Very Satisfied	94	34	28	13	4	16	*	-	67	11	6	5	5	52	36	31	56
	49%	44%	73%	48%	15%	67%	20%	-%	52%	53%	37%	28%	66%	49%	55%	49%	53%
Don't Know (DO NOT READ OUT)	24	14	2	*	6	-	1	-	19	*	4	*	1	14	5	8	12
	13%	19%	6%	1%	24%	-%	43%	-%	15%	1%	20%	1%	16%	13%	8%	12%	11%
NET: Satisfied	154	59	34	24	14	23	1	-	106	17	12	13	7	81	57	50	88
	80%	76%	89%	92%	52%	97%	57%	-%	81%	86%	67%	76%	83%	77%	88%	78%	83%
NET: Dissatisfied	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	-	-
	1%	-%	-%	5%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 74 (continuation)

Page 616

Daily delivery (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	77	39	67	164	116	169	146	56	139	124	169	61	125	117
Weighted total	193	42	69	166	109	175	150	39	145	125	171	53	120	122
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	1	1	-	1	1	1	-	-	1	-	1	-	-	-
	1%	-%	3%	1%	1%	1%	-%	-%	1%	-%	1%	-%	-%	-%
Neither Satisfied Nor Dissatisfied	13	3	-	11	9	11	11	5	9	11	11	5	8	11
	7%	4%	-%	6%	8%	6%	8%	12%	6%	9%	6%	9%	7%	9%
Fairly Satisfied	60	27	11	56	38	58	50	15	51	43	57	17	42	38
	31%	35%	26%	34%	35%	33%	33%	38%	35%	34%	33%	32%	35%	31%
Very Satisfied	94	35	23	81	48	85	75	17	72	63	82	28	57	62
	49%	44%	55%	49%	44%	49%	50%	43%	50%	50%	48%	53%	47%	51%
Don't Know (DO NOT READ OUT)	24	14	7	17	14	19	14	3	11	8	20	3	13	11
	13%	18%	16%	10%	12%	11%	9%	7%	8%	7%	12%	5%	11%	9%
NET: Satisfied	154	62	34	137	85	143	125	32	123	105	139	45	99	101
	80%	78%	81%	82%	79%	82%	83%	81%	85%	84%	81%	85%	82%	82%
NET: Dissatisfied	1	-	1	1	1	1	-	-	1	-	1	-	-	-
	1%	-%	3%	1%	1%	1%	-%	-%	1%	-%	1%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 74 (continuation)

Page 617

Daily delivery (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		*a	*b	c	a	b	c	d	e	*f	a	b	c	a	*b	c
Unweighted total	186	26	-	135	183	166	184	162	185	-	138	185	71	35	20	130
Weighted total	193	28	-	139	187	172	189	167	193	-	138	191	67	34	22	135
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	1	-	-	-	1	1	1	1	1	-	1	1	-	-	1	-
	1%	-%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	6%	-%
Neither Satisfied Nor Dissatisfied	13	2	-	11	11	12	13	13	13	-	11	13	6	3	4	6
	7%	8%	-%	8%	6%	7%	7%	8%	7%	-%	8%	7%	9%	9%	17%	4%
Fairly Satisfied	60	8	-	41	60	52	60	51	60	-	42	60	18	12	5	43
	31%	29%	-%	29%	32%	30%	32%	30%	31%	-%	30%	32%	26%	36%	22%	32%
Very Satisfied	94	15	-	73	90	83	90	81	94	-	66	92	35	18	8	68
	49%	53%	-%	52%	48%	48%	48%	48%	49%	-%	48%	48%	52%	52%	37%	51%
Don't Know (DO NOT READ OUT)	24	3	-	15	24	23	24	21	24	-	18	24	9	1	4	18
	13%	11%	-%	11%	13%	13%	13%	13%	12%	-%	13%	13%	13%	3%	18%	13%
NET: Satisfied	154	23	-	113	150	135	150	131	154	-	108	152	52	30	13	111
	80%	82%	-%	82%	81%	79%	80%	79%	80%	-%	78%	80%	78%	88%	59%	82%
NET: Dissatisfied	1	-	-	-	1	1	1	1	1	-	1	1	-	-	1	-
	1%	-%	-%	-%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	6%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 74 (continuation)

Page 618

Daily delivery (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experinced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
		a	*b	c	a	b	a	*b	a	*b	a	b	a	*b
Significance Level: 95%	186	59	15	105	129	57	180	6	103	12	62	99	166	3
Unweighted total	193	64	20	105	136	56	188	5	115	12	62	105	172	2
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	1	-	-	1	1	-	1	-	-	-	-	-	-	-
1%	1%	-%	-%	1%	1%	-%	1%	-%	-%	-%	-%	-%	-%	-%
Neither Satisfied Nor Dissatisfied	13	7	2	4	6	7	13	-	7	4	8	4	7	1
7%	7%	11%	9%	4%	5%	12%	7%	-%	6%	33%	14%	4%	4%	31%
Fairly Satisfied	60	20	5	34	47	13	60	*	29	1	17	32	52	-
31%	31%	32%	25%	33%	34%	24%	32%	10%	25%	8%	27%	31%	30%	-%
Very Satisfied	94	27	13	51	64	31	90	4	67	3	28	59	94	-
49%	49%	42%	66%	48%	47%	54%	48%	78%	58%	26%	45%	57%	55%	-%
Don't Know (DO NOT READ OUT)	24	10	-	15	18	6	24	1	13	4	9	9	18	1
13%	13%	15%	-%	14%	13%	11%	13%	12%	11%	33%	15%	8%	11%	69%
NET: Satisfied	154	48	18	86	111	44	150	4	96	4	44	91	146	-
80%	80%	74%	91%	81%	81%	78%	80%	88%	83%	34%	72%	87%	85%	-%
NET: Dissatisfied	1	-	-	1	1	-	1	-	-	-	-	-	-	-
1%	1%	-%	-%	1%	1%	-%	1%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 74 (continuation)

Page 619

Daily delivery (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Quarter	
	Q1 2013	Q2 2013
Significance Level: 95%	a	b
Unweighted total	186	104
Weighted total	193	99
Very Dissatisfied	-	-
	-%	-%
Fairly Dissatisfied	1	-
	1%	-%
Neither Satisfied Nor Dissatisfied	13	6
	7%	6%
Fairly Satisfied	60	37
	31%	37%
Very Satisfied	94	43
	49%	43%
Don't Know (DO NOT READ OUT)	24	14
	13%	14%
NET: Satisfied	154	80
	80%	80%
NET: Dissatisfied	1	-
	1%	-%

Columns Tested: a,b

Table 75
Price of postage (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%														
Unweighted total	186	9	17	11	13	17	28	8	14	12	23	16	18	129
Weighted total	193	13	25	20	12	14	35	13	24	12	10	7	7	169
Very Dissatisfied	5	-	-	-	-	3	2	-	-	-	*	-	*	4
	3%	-%	-%	-%	-%	18%	5%	-%	-%	-%	5%	-%	7%	3%
Fairly Dissatisfied	5	2	-	-	-	-	-	-	2	-	*	+	*	4
	3%	14%	-%	-%	-%	-%	-%	-%	9%	-%	5%	7%	7%	2%
Neither Satisfied Nor Dissatisfied	41	*	2	9	2	4	9	2	7	3	1	*	2	38
	21%	1%	10%	45%	13%	29%	27%	15%	28%	21%	6%	7%	32%	22%
Fairly Satisfied	72	7	7	5	6	3	13	5	7	8	3	4	3	62
	37%	56%	28%	27%	52%	23%	36%	42%	28%	64%	35%	53%	46%	37%
Very Satisfied	65	4	16	5	3	4	11	5	8	1	4	2	*	59
	34%	28%	63%	27%	24%	30%	32%	42%	35%	12%	42%	26%	7%	35%
Don't Know (DO NOT READ OUT)	3	*	-	-	1	-	-	-	*	*	1	1	*	2
	2%	1%	-%	-%	10%	-%	-%	-%	1%	3%	6%	8%	2%	1%
NET: Satisfied	138	11	23	11	9	8	24	11	15	9	7	6	4	121
	71%	84%	90%	55%	76%	53%	68%	85%	62%	76%	78%	79%	53%	71%
NET: Dissatisfied	11	2	-	-	-	3	2	-	2	-	1	*	1	8
	6%	14%	-%	-%	-%	18%	5%	-%	9%	-%	10%	7%	14%	5%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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Table 75 (continuation)

Page 621

Price of postage (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	186	141	21	9	5	10	45	126	60	171	15	73	50	21	42
Weighted total	193	184	4	2	1	2	8	145	48	189	4	86	50	20	37
Very Dissatisfied	5	5	-	-	-	-	-	2	4	5	-	4	1	*	-
	3%	3%	-%	-%	-%	-%	-%	1%	7%	3%	-%	4%	3%	2%	-%
									a						
Fairly Dissatisfied	5	5	-	-	-	-	-	1	4	5	-	3	2	-	1
	3%	3%	-%	-%	-%	-%	-%	1%	8%	3%	-%	3%	4%	-%	3%
									a						
Neither Satisfied Nor Dissatisfied	41	39	1	*	*	1	2	35	7	40	1	16	14	5	7
	21%	21%	27%	20%	16%	39%	27%	24%	14%	21%	21%	18%	28%	25%	18%
Fairly Satisfied	72	70	1	*	*	*	2	56	16	70	2	30	16	8	18
	37%	38%	31%	12%	48%	11%	25%	39%	34%	37%	49%	35%	31%	41%	50%
Very Satisfied	65	62	2	1	*	*	3	48	17	65	*	31	18	6	10
	34%	34%	42%	41%	36%	6%	34%	33%	35%	34%	11%	36%	35%	31%	28%
Don't Know (DO NOT READ OUT)	3	2	-	*	-	1	1	3	1	3	1	3	*	*	1
	2%	1%	-%	27%	-%	43%	14%	2%	2%	1%	20%	3%	*%	1%	1%
							a								
NET: Satisfied	138	133	3	1	1	*	5	105	33	135	2	61	33	14	29
	71%	72%	73%	52%	84%	18%	59%	72%	69%	72%	59%	72%	66%	72%	78%
NET: Dissatisfied	11	11	-	-	-	-	-	3	7	11	-	6	3	*	1
	6%	6%	-%	-%	-%	-%	-%	2%	16%	6%	-%	7%	6%	2%	3%
									a						

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 75 (continuation)

Page 622

Price of postage (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	*d	*e	*f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	186	66	36	23	26	26	9	-	124	19	15	14	14	107	57	67	97
Weighted total	193	77	38	26	26	24	2	-	130	20	18	17	8	105	65	64	106
Very Dissatisfied	5	2	1	2	-	-	-	-	4	-	1	-	*	*	2	*	2
	3%	3%	3%	7%	-%	-%	-%	-%	3%	-%	7%	-%	6%	*%	3%	1%	2%
Fairly Dissatisfied	5	2	*	-	-	2	*	-	4	2	-	-	-	5	-	1	4
	3%	3%	1%	-%	-%	10%	22%	-%	3%	9%	-%	-%	-%	5%	-%	2%	4%
Neither Satisfied Nor Dissatisfied	41	23	6	2	6	4	*	-	31	*	3	6	1	21	12	16	16
	21%	30%	15%	9%	23%	15%	21%	-%	24%	1%	16%	34%	17%	20%	18%	26%	15%
Fairly Satisfied	72	29	14	10	11	7	1	-	43	7	11	8	4	43	24	27	40
	37%	38%	36%	38%	43%	32%	42%	-%	33%	35%	60%	47%	48%	41%	36%	43%	37%
Very Satisfied	65	19	16	12	7	10	*	-	46	11	3	3	2	34	27	18	43
	34%	25%	43%	46%	28%	43%	15%	-%	36%	53%	17%	19%	25%	32%	42%	28%	41%
Don't Know (DO NOT READ OUT)	3	1	*	*	1	*	-	-	3	*	-	-	*	2	1	1	1
	2%	2%	1%	1%	6%	1%	-%	-%	2%	2%	-%	-%	4%	1%	1%	2%	1%
NET: Satisfied	138	49	30	22	18	18	1	-	89	18	13	11	6	77	51	45	83
	71%	63%	79%	83%	71%	74%	57%	-%	69%	88%	77%	66%	73%	73%	78%	70%	78%
NET: Dissatisfied	11	4	2	2	-	2	*	-	7	2	1	-	*	6	2	1	6
	6%	6%	5%	7%	-%	10%	22%	-%	5%	9%	7%	-%	6%	6%	3%	2%	6%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 75 (continuation)

Page 623

Price of postage (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	77	39	67	164	116	169	146	56	139	124	169	61	125	117
Weighted total	193	79	42	166	109	175	150	39	145	125	171	53	120	122
Very Dissatisfied	5	4	2	2	2	2	2	1	2	1	2	2	*	1
3%	5%	4%	-%	1%	2%	1%	2%	2%	1%	1%	1%	4%	3%	1%
Fairly Dissatisfied	5	3	2	3	3	3	3	-	5	3	3	-	3	3
3%	3%	4%	1%	2%	3%	2%	2%	-%	4%	2%	2%	-%	3%	3%
Neither Satisfied Nor Dissatisfied	41	23	10	39	24	41	31	6	33	28	38	13	21	22
21%	30%	25%	10%	23%	22%	24%	21%	15%	23%	23%	22%	24%	17%	18%
Fairly Satisfied	72	24	14	61	40	65	58	14	52	45	66	22	53	47
37%	31%	34%	47%	37%	37%	37%	39%	35%	36%	36%	39%	41%	44%	38%
Very Satisfied	65	24	12	58	38	61	54	18	51	47	59	16	41	49
34%	30%	28%	41%	35%	35%	35%	36%	46%	35%	38%	35%	30%	34%	40%
Don't Know (DO NOT READ OUT)	3	1	2	2	2	2	1	*	2	1	2	*	2	*
2%	1%	4%	3%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	3%
NET: Satisfied	138	48	26	120	78	126	112	32	102	92	125	38	94	96
71%	61%	62%	88%	72%	72%	72%	75%	82%	71%	74%	73%	71%	78%	78%
NET: Dissatisfied	11	6	4	5	5	5	5	1	7	4	5	2	4	4
6%	8%	9%	1%	3%	5%	3%	4%	2%	5%	3%	3%	4%	3%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 75 (continuation)

Page 624

Price of postage (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		*a	*b	c	a	b	c	d	e	*f	a	b	c	a	*b	c
Unweighted total	186	26	-	135	183	166	184	162	185	-	138	185	71	35	20	130
Weighted total	193	28	-	139	187	172	189	167	193	-	138	191	67	34	22	135
Very Dissatisfied	5	-	-	1	5	4	5	4	5	-	4	5	4	-	1	3
	3%	-%	-%	1%	3%	2%	3%	2%	3%	-%	3%	3%	6%	-%	6%	2%
Fairly Dissatisfied	5	2	-	3	3	3	3	3	5	-	3	3	-	2	*	3
	3%	8%	-%	2%	2%	2%	2%	2%	3%	-%	2%	2%	-%	5%	2%	2%
Neither Satisfied Nor Dissatisfied	41	2	-	28	41	35	41	36	41	-	31	41	17	6	3	32
	21%	6%	-%	20%	22%	21%	22%	22%	21%	-%	22%	22%	25%	17%	13%	24%
Fairly Satisfied	72	12	-	55	68	65	70	66	72	-	53	72	25	15	9	48
	37%	42%	-%	40%	37%	38%	37%	39%	37%	-%	39%	38%	38%	44%	39%	36%
Very Satisfied	65	12	-	50	65	62	65	56	65	-	46	65	21	11	9	45
	34%	44%	-%	36%	35%	36%	35%	34%	34%	-%	33%	34%	31%	33%	40%	33%
Don't Know (DO NOT READ OUT)	3	-	-	2	3	3	3	2	3	-	2	3	*	*	-	3
	2%	-%	-%	1%	2%	1%	2%	1%	2%	-%	1%	2%	-%	1%	-%	2%
NET: Satisfied	138	24	-	105	134	126	136	122	138	-	99	138	46	26	18	93
	71%	86%	-%	76%	72%	74%	72%	73%	71%	-%	72%	72%	68%	77%	79%	69%
NET: Dissatisfied	11	2	-	4	9	7	9	7	11	-	7	9	4	2	2	6
	6%	8%	-%	3%	5%	4%	5%	4%	6%	-%	5%	5%	6%	5%	8%	4%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 75 (continuation)

Page 625

Price of postage (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	Significance Level: 95%													
Unweighted total	186	a	*b	c	a	b	a	*b	a	*b	a	b	a	*b
Weighted total	193	59	15	105	129	57	180	6	103	12	62	99	166	3
Very Dissatisfied	5	2	-	4	5	*	5	-	1	-	*	*	3	1
	3%	3%	-%	3%	4%	1%	3%	-%	1%	-%	1%	3%	2%	69%
Fairly Dissatisfied	5	-	-	5	5	-	5	-	5	-	3	3	5	-
	3%	-%	-%	5%	4%	-%	3%	-%	4%	-%	4%	2%	3%	-%
Neither Satisfied Nor Dissatisfied	41	8	3	30	29	12	40	1	22	3	8	22	34	*
	21%	12%	17%	28% a	21%	22%	21%	26%	19%	24%	12%	21%	20%	6%
Fairly Satisfied	72	30	7	35	44	28	72	*	43	7	27	40	68	*
	37%	46%	37%	34%	32%	50% a	38%	10%	38%	58%	43%	38%	40%	25%
Very Satisfied	65	25	9	29	51	14	63	2	42	2	23	39	59	-
	34%	39%	46%	27%	37%	25%	34%	43%	36%	18%	37%	38%	35%	-%
Don't Know (DO NOT READ OUT)	3	*	-	3	2	1	2	1	2	-	1	1	2	-
	2%	1%	-%	3%	1%	3%	1%	22%	2%	-%	2%	1%	1%	-%
NET: Satisfied	138	54	17	64	95	42	135	3	85	9	50	79	128	*
	71%	85% c	83%	61%	70%	75%	72%	52%	74%	76%	80%	76%	75%	25%
NET: Dissatisfied	11	2	-	9	10	*	11	-	6	-	3	3	8	1
	6%	3%	-%	8%	7%	1%	6%	-%	5%	-%	5%	3%	5%	69%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 75 (continuation)

Page 626

Price of postage (QOP2. As a recipient and sender of mail, how would you rate the performance of ^f('QV5c')^ in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?)

Base: All Respondents who use more than one mail service provider

TOTAL	Quarter	
	Q1 2013	Q2 2013
Significance Level: 95%	a	b
Unweighted total	186	104
Weighted total	193	99
Very Dissatisfied	5	4
	3%	4%
Fairly Dissatisfied	5	1
	3%	1%
Neither Satisfied Nor Dissatisfied	41	19
	21%	19%
Fairly Satisfied	72	36
	37%	37%
Very Satisfied	65	36
	34%	36%
Don't Know (DO NOT READ OUT)	3	2
	2%	2%
NET: Satisfied	138	73
	71%	73%
NET: Dissatisfied	11	5
	6%	5%

Columns Tested: a,b

Table 76 Page 627
QOP2. SUMMARY. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas ...
Base: All Respondents who use more than one mail service provider

	Areas									
	Delivery time (when you receive your mail delivery)	Delivery consistency / reliability (e.g. arrives as promised consistently)	Time of collection	Collection reliability	Availability of a daily collection	Latest collection time	Account management (if applicable)	Trustworthiness of the provider	Amount / level of lost mail	Daily delivery
Unweighted total	441	441	441	441	441	441	441	441	441	186
Weighted total	426	426	426	426	426	426	426	426	426	193
Very Dissatisfied	4 1%	* *%	3 1%	3 1%	* *%	4 1%	1 *%	3 1%	3 1%	- -%
Fairly Dissatisfied	9 2%	8 2%	7 2%	3 1%	6 1%	6 1%	6 1%	7 2%	8 2%	1 1%
Neither Satisfied Nor Dissatisfied	29 7%	44 10%	37 9%	22 5%	23 5%	57 13%	16 4%	29 7%	28 6%	13 7%
Fairly Satisfied	151 35%	156 37%	139 33%	127 30%	99 23%	117 27%	45 11%	134 31%	95 22%	60 31%
Very Satisfied	173 41%	179 42%	201 47%	234 55%	256 60%	202 47%	66 15%	246 58%	276 65%	94 49%
Don't Know (DO NOT READ OUT)	61 14%	40 9%	39 9%	37 9%	43 10%	41 10%	293 69%	8 2%	17 4%	24 13%
NET: Satisfied	323 76%	334 78%	340 80%	361 85%	355 83%	319 75%	111 26%	379 89%	371 87%	154 80%
NET: Dissatisfied	13 3%	8 2%	10 2%	5 1%	6 1%	10 2%	6 1%	9 2%	11 2%	1 1%

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Table 76 (continuation) Page 628

QOP2. SUMMARY. As a recipient and sender of mail, how would you rate the performance of [QV5c provider] in the following areas ...

Base: All Respondents who use more than one mail service provider

	Areas
	Price of postage
Unweighted total	186
Weighted total	193
Very Dissatisfied	5 3%
Fairly Dissatisfied	5 3%
Neither Satisfied Nor Dissatisfied	41 21%
Fairly Satisfied	72 37%
Very Satisfied	65 34%
Don't Know (DO NOT READ OUT)	3 2%
NET: Satisfied	138 71%
NET: Dissatisfied	11 6%

Table 77
QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider

Significance Level: 95%

Unweighted total

Weighted total

No Problems

Damaged mail / goods

Amount of lost mail

Delivery reliability
(e.g. arrives as
promised)

Lost or late delivery of
sent mail

Delivery time (when you
receive your mail
delivery)

Collection reliability

Wrong mail delivered /
our mail delivered
elsewhere

Time of collection

Trustworthiness of the
provider

Account management (if
applicable)

Availability of a daily
collection

Latest collection time

Wrong postage /
shortfall on incoming
mail - having to pay

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
441	*a	b	*c	d	e	f	g	h	*i	j	k	l	m
19	19	36	23	32	40	67	38	30	27	52	45	32	312
426	26	55	31	29	35	82	47	51	25	19	17	9	381
348	22	41	20	24	31	71	43	38	21	15	13	8	311
82%	86%	74%	65%	80%	88%	86%	92%	74%	84%	82%	79%	89%	81%
							b						
20	2	-	4	4	1	4	-	2	1	-	2	1	18
5%	7%	-%	11%	14%	4%	4%	-%	4%	5%	-%	12%	6%	5%
				bgjm							bgjm		
19	*	5	4	*	*	4	2	2	-	1	1	-	17
4%	1%	8%	12%	1%	1%	5%	4%	4%	-%	4%	6%	-%	4%
15	-	4	2	-	-	4	-	5	-	1	1	-	14
4%	-%	8%	6%	-%	-%	4%	-%	9%	-%	4%	4%	-%	4%
13	2	5	*	1	*	2	2	-	1	-	-	-	13
3%	7%	8%	*%	4%	1%	2%	4%	-%	5%	-%	-%	-%	3%
		j											
11	*	2	2	-	-	2	2	2	-	*	-	-	10
2%	1%	4%	6%	-%	-%	2%	4%	4%	-%	3%	-%	-%	3%
7	-	2	-	*	1	*	*	2	-	*	*	-	6
2%	-%	4%	-%	1%	4%	*%	*%	4%	-%	3%	3%	-%	2%
6	-	2	-	-	-	-	-	2	1	*	-	*	6
2%	-%	4%	-%	-%	-%	-%	-%	4%	5%	3%	-%	5%	1%
5	-	2	-	-	-	-	-	2	-	*	*	-	5
1%	-%	4%	-%	-%	-%	-%	-%	4%	-%	3%	1%	-%	1%
2	-	-	-	-	-	-	-	2	-	-	-	-	2
*%	-%	-%	-%	-%	-%	-%	-%	4%	-%	-%	-%	-%	1%
								m					
1	-	-	-	-	1	-	-	-	-	-	-	-	1
*%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	-%	-%	*%
					m								
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

Significance Level: 95%
Unweighted total
Weighted total

Accessibility of the
sorting office / opening
hours

Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
441	*a 19	b 36	*c 23	d 32	e 40	f 67	g 38	h 30	*i 27	j 52	k 45	l 32	m 312
426	26	55	31	29	35	82	47	51	25	19	17	9	381
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
4	-	*	2	-	-	-	2	-	-	-	*	-	4
1%	-%	1%	6%	-%	-%	-%	4%	-%	-%	-%	3%	-%	1%
13	-	8	2	*	-	2	*	-	-	*	*	-	12
3%	-%	15%	6%	1%	-%	2%	*%	-%	-%	3%	3%	-%	3%
		defghjkl m											

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
Weighted total	426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
No Problems	348	327	12	3	2	3	20	258	89	334	14	173	94	35	45
	82%	82%	85%	63%	95%	86%	82%	80%	88%	81%	83%	90%	81%	64%	73%
Damaged mail / goods	20	20	*	*	-	-	*	17	4	19	2	6	7	4	4
	5%	5%	2%	4%	-%	-%	2%	5%	4%	5%	11%	3%	6%	7%	6%
Amount of lost mail	19	17	1	1	*	-	2	14	5	18	*	3	3	6	7
	4%	4%	6%	18%	5%	-%	7%	4%	5%	4%	1%	1%	2%	11%	11%
														ab	ab
Delivery reliability (e.g. arrives as promised)	15	15	*	*	-	-	1	10	5	14	2	*	5	6	4
	4%	4%	3%	5%	-%	-%	3%	3%	5%	3%	11%	*%	4%	11%	7%
											a		a	a	a
Lost or late delivery of sent mail	13	12	*	*	-	*	1	13	*	13	*	4	4	4	2
	3%	3%	2%	6%	-%	10%	4%	4%	*%	3%	2%	2%	3%	7%	3%
								b							
Delivery time (when you receive your mail delivery)	11	10	*	-	-	-	*	8	2	10	*	2	5	2	2
	2%	3%	3%	-%	-%	-%	2%	3%	2%	2%	2%	1%	4%	3%	3%
Collection reliability	7	6	*	*	-	*	*	6	*	7	*	3	3	*	2
	2%	2%	1%	4%	-%	4%	2%	2%	*%	2%	1%	1%	2%	*%	3%
Wrong mail delivered / our mail delivered elsewhere	6	6	-	-	-	-	-	6	*	6	-	3	1	2	-
	2%	2%	-%	-%	-%	-%	-%	2%	*%	2%	-%	2%	1%	4%	-%
Time of collection	5	5	*	*	-	*	*	5	*	5	*	2	3	-	*
	1%	1%	2%	2%	-%	-%	2%	1%	*%	1%	2%	1%	2%	-%	1%
Trustworthiness of the provider	2	2	-	-	-	-	-	2	-	2	-	-	-	2	-
	*%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	-%	-%	4%	-%
														ab	
Account management (if applicable)	1	1	-	-	-	-	-	1	-	1	-	1	-	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	1%	-%	-%	-%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 77 (continuation) Page 632

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

Significance Level: 95%

Unweighted total

Weighted total

Accessibility of the
sorting office / opening
hours

Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
441	294	85	27	14	21	147	317	124	402	39	177	113	60	91
426	402	14	5	2	3	25	324	102	410	17	193	117	55	61
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
4	4	-	*	-	-	*	4	*	4	*	4	*	-	-
1%	1%	-	7%	-%	-%	1%	1%	1%	1%	2%	2%	1%	-%	-%
13	13	*	*	-	-	*	13	*	13	-	2	4	6	1
3%	3%	1%	4%	-%	-%	1%	4%	1%	3%	-%	1%	4%	11%	1%
													ad	

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
No Problems	348	115	79	61	53	27	10	2	254	30	25	26	12	228	94	154	168
	82%	82%	89%	88%	80%	62%	79%	58%	85%	77%	74%	80%	54%	83%	77%	86%	78%
		e	e	e	e	e	e		e	e	e	e			b	b	
Damaged mail / goods	20	9	3	*	*	6	1	*	13	2	*	2	3	15	4	12	7
	5%	7%	3%	1%	*	13%	12%	5%	4%	5%	1%	5%	14%	6%	3%	6%	3%
		d				bcd	cd					a					
Amount of lost mail	19	2	3	4	8	1	*	*	6	4	1	4	3	7	11	3	16
	4%	2%	3%	6%	12%	1%	1%	7%	2%	11%	3%	12%	13%	3%	9%	1%	7%
					abe					a		a			a		a
Delivery reliability (e.g. arrives as promised)	15	2	2	3	2	6	*	*	8	3	2	2	-	9	7	9	7
	4%	2%	2%	5%	3%	14%	1%	3%	3%	8%	6%	7%	-%	3%	5%	5%	3%
					abdf												
Lost or late delivery of sent mail	13	6	2	1	*	3	1	-	6	2	2	-	3	7	6	1	12
	3%	4%	2%	2%	*%	7%	4%	-%	2%	5%	6%	-%	14%	3%	5%	1%	5%
					d								ad				a
Delivery time (when you receive your mail delivery)	11	2	2	-	4	2	-	-	6	2	2	-	*	7	4	4	7
	2%	2%	2%	-%	6%	6%	-%	-%	2%	6%	5%	-%	1%	2%	3%	2%	3%
					c												
Collection reliability	7	-	1	*	2	2	-	1	4	3	-	*	*	7	*	2	4
	2%	-%	1%	1%	3%	5%	-%	32%	1%	7%	-%	1%	1%	2%	*%	1%	2%
					a	a				a							
Wrong mail delivered / our mail delivered elsewhere	6	*	-	1	5	-	-	-	1	2	1	-	2	2	3	*	5
	2%	*%	-%	2%	7%	-%	-%	-%	*%	5%	4%	-%	9%	1%	3%	*%	2%
					abe					a	a		a				
Time of collection	5	*	-	*	2	2	-	-	3	2	-	-	*	5	*	-	5
	1%	*%	-%	*%	3%	6%	-%	-%	1%	5%	-%	-%	1%	2%	*%	-%	2%
					ab					a							a
Trustworthiness of the provider	2	2	-	-	-	-	-	-	-	-	2	-	-	-	-	-	-
	*%	2%	-%	-%	-%	-%	-%	-%	-%	-%	6%	-%	-%	-%	-%	-%	-%
											a						
Account management (if applicable)	1	1	-	-	-	-	-	-	1	-	-	-	-	1	-	-	1
	*%	1%	-%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	*%	-%	-%	1%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 77 (continuation)

Page 634

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	441	117	90	68	74	53	31	8	293	48	32	34	34	291	116	197	211
Weighted total	426	141	89	69	66	44	12	4	298	39	34	33	23	274	123	179	217
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	4	2	2	-	*	-	-	-	4	*	-	*	-	4	*	2	2
	1%	1%	2%	-%	1%	-%	-%	-%	1%	1%	-%	1%	-%	1%	1%	1%	1%
Other	13	8	-	-	2	2	*	*	8	2	-	-	3	5	9	*	13
	3%	6%	-%	-%	3%	5%	4%	5%	3%	5%	-%	-%	12%	2%	7%	1%	6%
		bc				b						acd		a			a

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	441	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	426	175	95	165	410	310	417	359	173	350	310	415	151	335	320
No Problems	348	175	86	161	391	273	400	340	141	338	288	397	119	310	313
	82%	147	75	122	318	213	322	269	106	274	233	319	85	244	243
		84%	87%	76%	81%	78%	80%	79%	75%	81%	81%	80%	72%	79%	78%
			c								c	c			
Damaged mail / goods	20	7	2	12	19	14	20	19	11	18	12	20	8	18	20
	5%	4%	2%	7%	5%	5%	5%	5%	8%	5%	4%	5%	6%	6%	6%
Amount of lost mail	19	7	4	8	18	16	18	19	8	18	16	19	11	16	18
	4%	4%	4%	5%	5%	6%	5%	5%	5%	5%	6%	5%	9%	5%	6%
												b			
Delivery reliability (e.g. arrives as promised)	15	*	2	13	15	15	15	15	9	13	12	15	7	13	15
	4%	%	3%	8%	4%	6%	4%	5%	6%	4%	4%	4%	6%	4%	5%
			a	a											
Lost or late delivery of sent mail	13	8	*	5	13	13	13	11	4	9	11	13	8	9	13
	3%	5%	%	3%	3%	5%	3%	3%	3%	3%	4%	3%	7%	3%	4%
		b													
Delivery time (when you receive your mail delivery)	11	2	2	7	11	11	11	11	8	10	8	11	3	8	10
	2%	1%	2%	4%	3%	4%	3%	3%	6%	3%	3%	3%	2%	3%	3%
Collection reliability	7	*	-	6	7	6	7	7	6	7	3	7	4	4	7
	2%	%	-%	4%	2%	2%	2%	2%	4%	2%	1%	2%	4%	1%	2%
				ab											
Wrong mail delivered / our mail delivered elsewhere	6	*	-	5	6	4	6	6	4	6	6	6	5	1	5
	2%	%	-%	3%	2%	1%	2%	2%	3%	2%	2%	2%	4%	%	2%
				a											
Time of collection	5	1	-	5	5	5	5	5	4	5	3	5	5	3	5
	1%	%	-%	3%	1%	2%	1%	1%	3%	1%	1%	1%	4%	1%	2%
												ab			
Trustworthiness of the provider	2	-	2	-	-	2	2	2	-	-	2	2	-	-	-
	%	-%	2%	-%	-%	1%	1%	1%	-%	-%	1%	1%	-%	-%	-%
			ac												
Account management (if applicable)	1	1	-	-	1	-	1	-	-	-	-	1	-	1	-
	%	1%	-%	-%	%	-%	%	-%	-%	-%	-%	%	-%	%	-%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b															

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

Significance Level: 95%

Unweighted total

Weighted total

Wrong postage /
shortfall on incoming
mail - having to pay

Accessibility of the
sorting office / opening
hours

Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
441	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	175	95	165	410	310	417	359	173	350	310	415	151	335	320
Weighted total	175	86	161	391	273	400	340	141	338	288	397	119	310	313
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	4	*	*	4	3	4	3	1	4	1	4	-	4	4
1%	2%	1%	*%	1%	1%	1%	1%	1%	1%	*%	1%	-%	1%	1%
Other	13	2	6	13	9	13	11	6	11	11	13	7	11	11
3%	3%	2%	3%	3%	3%	3%	3%	4%	3%	4%	3%	6%	3%	3%

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Table 77 (continuation)

Page 637

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	310	417	376	419	361	426	-	280	421	147	70	49	306
No Problems	348	60	8	338	309	340	296	347	-	223	342	115	46	37	263
	82%	81%	71%	81%	82%	81%	82%	82%	-%	80%	81%	78%	65%	77%	86%
Damaged mail / goods	20	4	3	20	18	20	19	20	-	15	20	10	11	2	8
	5%	5%	28%	5%	5%	5%	5%	5%	-%	6%	5%	7%	15%	4%	3%
Amount of lost mail	19	6	*	19	16	19	13	19	-	14	19	8	5	6	8
	4%	8%	1%	4%	4%	4%	4%	4%	-%	5%	4%	5%	7%	12%	3%
Delivery reliability (e.g. arrives as promised)	15	2	2	15	11	15	13	15	-	11	15	7	5	-	11
	4%	3%	16%	4%	3%	4%	4%	4%	-%	4%	4%	5%	7%	-%	3%
Lost or late delivery of sent mail	13	-	-	13	7	13	9	13	-	9	13	6	5	5	3
	3%	-%	-%	3%	2%	3%	2%	3%	-%	3%	3%	4%	8%	10%	1%
Delivery time (when you receive your mail delivery)	11	4	-	11	9	11	11	11	-	8	11	3	-	6	5
	2%	6%	-%	3%	2%	3%	3%	2%	-%	3%	3%	2%	-%	12%	1%
Collection reliability	7	2	-	7	6	7	6	7	-	3	7	3	*	3	4
	2%	3%	-%	2%	2%	2%	2%	2%	-%	1%	2%	2%	1%	5%	1%
Wrong mail delivered / our mail delivered elsewhere	6	2	-	6	6	6	6	6	-	6	6	5	-	2	4
	2%	3%	-%	2%	2%	2%	2%	2%	-%	2%	2%	3%	-%	4%	1%
Time of collection	5	3	-	5	5	5	5	5	-	3	5	3	-	2	3
	1%	4%	-%	1%	1%	1%	1%	1%	-%	1%	1%	2%	-%	5%	1%
Trustworthiness of the provider	2	-	-	2	2	2	2	2	-	2	2	-	-	-	2
	*%	-%	-%	1%	1%	1%	1%	*%	-%	1%	1%	-%	-%	-%	1%
Account management (if applicable)	1	-	-	1	1	1	1	1	-	1	1	-	-	-	1
	*%	-%	-%	*%	*%	*%	*%	*%	-%	*%	*%	-%	-%	-%	*%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	77	12	319	435	397	436	382	440	-	310	436	180	74	50	315
Weighted total	426	74	11	310	417	376	419	361	426	280	421	147	70	49	306
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	4	-	4	4	3	4	4	4	-	2	4	2	-	-	4
	1%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	-%	-%	1%
Other	13	4	9	13	11	13	7	13	-	8	13	5	9	2	2
	3%	5%	3%	3%	3%	3%	2%	3%	-%	3%	3%	3%	13%	4%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	441	126	44	262	319	122	432	9	263	34	139	264	387	10
Weighted total	426	139	44	240	310	116	418	9	253	31	137	255	376	8
No Problems	348	98	34	213	249	99	339	9	203	26	103	214	327	3
	82%	70%	77%	89% ab	80%	85%	81%	100%	80%	84%	76%	84%	87%	32%
Damaged mail / goods	20	11	1	8	17	3	20	-	18	2	10	11	9	2
	5%	8%	3%	3%	6%	3%	5%	-%	7%	6%	7%	4%	2%	31%
Amount of lost mail	19	11	3	5	11	7	19	-	10	2	7	12	13	2
	4%	8%	6%	2%	4%	6%	4%	-%	4%	6%	5%	5%	3%	26%
Delivery reliability (e.g. arrives as promised)	15	9	*	6	15	*	15	-	8	*	5	11	9	3
	4%	7%	1%	2%	5%	*%	4%	-%	3%	1%	3%	4%	2%	32%
Lost or late delivery of sent mail	13	10	3	*	10	3	13	-	9	*	9	4	10	-
	3%	7%	7%	*%	3%	3%	3%	-%	4%	1%	7%	2%	3%	-%
Delivery time (when you receive your mail delivery)	11	8	2	*	6	5	11	-	8	2	7	4	2	4
	2%	6%	5%	*%	2%	4%	3%	-%	3%	7%	5%	1%	1%	49%
Collection reliability	7	5	2	*	4	3	7	-	5	-	2	5	4	*
	2%	3%	4%	*%	1%	3%	2%	-%	2%	-%	2%	2%	1%	4%
Wrong mail delivered / our mail delivered elsewhere	6	3	2	1	4	2	6	-	5	*	3	3	6	-
	2%	2%	5%	*%	1%	2%	2%	-%	2%	2%	2%	1%	2%	-%
Time of collection	5	5	*	-	3	3	5	-	2	1	3	2	2	-
	1%	3%	1%	-%	1%	2%	1%	-%	1%	2%	2%	1%	1%	-%
Trustworthiness of the provider	2	2	-	-	2	-	2	-	-	-	-	-	-	-
	*%	2%	-%	-%	1%	-%	1%	-%	-%	-%	-%	-%	-%	-%
Account management (if applicable)	1	-	-	1	1	-	1	-	-	-	1	-	1	-
	*%	-%	-%	1%	*%	-%	*%	-%	-%	-%	1%	-%	*%	-%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

Significance Level: 95%
Unweighted total
Weighted total

Wrong postage /
shortfall on incoming
mail - having to pay

Accessibility of the
sorting office / opening
hours

Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
441	a	b	c	a	b	a	*b	a	b	a	b	a	*b
426	126	44	262	319	122	432	9	263	34	139	264	387	10
	139	44	240	310	116	418	9	253	31	137	255	376	8
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
4	-	-	4	*	4	4	-	2	-	2	2	1	-
1%	-%	-%	2%	*%	3%	1%	-%	1%	-%	2%	1%	*%	-%
					a								
13	7	1	6	13	1	13	-	6	2	9	4	12	1
3%	5%	2%	2%	4%	1%	3%	-%	2%	6%	7%	2%	3%	10%

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Table 77 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	441	129	126	104	82
Weighted total	426	115	119	99	93
No Problems	348	93	99	73	81
	82%	82%	84%	74%	87%
					c
Damaged mail / goods	20	6	4	6	4
	5%	5%	4%	6%	4%
Amount of lost mail	19	5	1	10	2
	4%	5%	1%	10%	2%
			bd		
Delivery reliability (e.g. arrives as promised)	15	9	2	4	-
	4%	8%	2%	4%	-%
		bd			
Lost or late delivery of sent mail	13	*	6	3	4
	3%	*%	5%	3%	4%
			a		a
Delivery time (when you receive your mail delivery)	11	6	-	2	2
	2%	5%	-%	2%	2%
		b			
Collection reliability	7	1	2	3	*
	2%	1%	2%	3%	*%
Wrong mail delivered / our mail delivered elsewhere	6	-	2	3	1
	2%	-%	2%	3%	1%
			a		
Time of collection	5	*	2	2	*
	1%	*%	2%	2%	1%
Trustworthiness of the provider	2	-	-	2	-
	*%	-%	-%	2%	-%
Account management (if applicable)	1	-	-	1	-
	*%	-%	-%	1%	-%
Availability of a daily collection	-	-	-	-	-
	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-
	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-
	-%	-%	-%	-%	-%
Columns Tested: a,b,c,d					

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider

Significance Level: 95%

Unweighted total

Weighted total

Accessibility of the
sorting office / opening
hours

Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
441	129	126	104	82
426	115	119	99	93
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
4	3	2	-	-
1%	2%	2%	-	-%
13	3	8	*	2
3%	2%	7%	*%	2%
		c		

Table 7b Page 643
QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider. Excluding those with no problems

Significance Level: 95%

Unweighted total

Weighted total

Damaged mail / goods

Amount of lost mail

Delivery reliability
(e.g. arrives as
promised)

Lost or late delivery of
sent mail

Delivery time (when you
receive your mail
delivery)

Collection reliability

Wrong mail delivered /
our mail delivered
elsewhere

Time of collection

Trustworthiness of the
provider

Account management (if
applicable)

Availability of a daily
collection

Latest collection time

No Problems

Wrong postage /
shortfall on incoming
mail - having to pay

Accessibility of the
sorting office / opening
hours

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
78	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m
Unweighted total	3	10	7	7	5	9	4	7	3	11	9	3	55
Weighted total	4	14	11	6	4	11	4	13	4	3	4	1	71
Damaged mail / goods	20	2	-	4	4	1	4	2	1	-	2	1	18
26%	48%	-%	33%	71%	30%	32%	-%	16%	33%	-%	57%	55%	25%
Amount of lost mail	19	*	5	4	*	4	2	2	-	1	1	-	17
24%	4%	33%	34%	7%	4%	33%	46%	16%	-%	24%	30%	-	24%
Delivery reliability (e.g. arrives as promised)	15	-	4	2	-	4	-	5	-	1	1	-	14
20%	-%	30%	16%	-	-%	32%	-%	35%	-%	20%	16%	-%	20%
Lost or late delivery of sent mail	13	2	5	*	1	*	2	2	-	1	-	-	13
17%	48%	33%	1%	23%	4%	17%	50%	-%	33%	-%	-%	-%	19%
Delivery time (when you receive your mail delivery)	11	*	2	2	-	-	2	2	2	-	*	-	10
13%	4%	17%	16%	-%	-%	16%	46%	16%	-%	14%	-%	-%	14%
Collection reliability	7	-	2	-	*	1	*	2	-	*	*	-	6
9%	-%	15%	-%	3%	30%	1%	4%	16%	-%	14%	13%	-%	9%
Wrong mail delivered / our mail delivered elsewhere	6	-	2	-	-	-	-	2	1	*	-	*	6
8%	-%	15%	-%	-%	-%	-%	-%	16%	33%	14%	-%	45%	8%
Time of collection	5	-	2	-	-	-	-	2	-	*	*	-	5
7%	-%	17%	-%	-%	-%	-%	-%	16%	-%	14%	3%	-%	6%
Trustworthiness of the provider	2	-	-	-	-	-	-	2	-	-	-	-	2
3%	-%	-%	-%	-%	-%	-%	-%	16%	-%	-%	-%	-%	3%
Account management (if applicable)	1	-	-	-	-	1	-	-	-	-	-	-	1
2%	-%	-%	-%	-%	30%	-%	-%	-%	-%	-%	-%	-%	2%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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Table 78 (continuation) Page 644

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

Significance Level: 95%
Unweighted total
Weighted total
Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
78	*a 3	*b 10	*c 7	*d 7	*e 5	*f 9	*g 4	*h 7	*i 3	*j 11	*k 9	*l 3	m 55
79	4	14	11	6	4	11	4	13	4	3	4	1	71
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
4	-	*	2	-	-	-	2	-	-	-	*	-	4
6%	-%	2%	16%	-%	-%	-%	46%	-%	-%	-%	13%	-%	6%
13	-	8	2	*	-	2	*	-	-	*	*	-	12
17%	-%	60%	16%	3%	-%	16%	4%	-%	-%	14%	13%	-%	18%

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Table 78 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	*f	a	*b	a	*b	*a	*b	*c	*d
Unweighted total	78	53	12	9	1	3	25	61	17	72	6	17	22	15	24
Weighted total	79	74	2	2	*	*	4	66	13	76	3	20	22	20	17
Damaged mail / goods	20	20	*	*	-	-	*	17	4	19	2	6	7	4	4
	26%	27%	10%	11%	-%	-%	9%	25%	29%	24%	62%	31%	31%	18%	23%
Amount of lost mail	19	17	1	1	*	-	2	14	5	18	*	3	3	6	7
	24%	23%	37%	49%	100%	-%	39%	20%	40%	24%	5%	14%	12%	31%	41%
Delivery reliability (e.g. arrives as promised)	15	15	*	*	-	-	1	10	5	14	2	*	5	6	4
	20%	20%	20%	13%	-%	-%	15%	16%	40%	18%	62%	1%	23%	30%	25%
Lost or late delivery of sent mail	13	12	*	*	-	*	1	13	*	13	*	4	4	4	2
	17%	16%	15%	16%	-%	70%	21%	20%	1%	17%	10%	20%	17%	19%	11%
Delivery time (when you receive your mail delivery)	11	10	*	-	-	-	*	8	2	10	*	2	5	2	2
	13%	14%	22%	-%	-%	-%	11%	12%	19%	13%	11%	11%	20%	9%	13%
Collection reliability	7	6	*	*	-	*	*	6	*	7	*	3	3	*	2
	9%	9%	7%	11%	-%	30%	11%	10%	4%	9%	5%	13%	12%	1%	10%
Wrong mail delivered / our mail delivered elsewhere	6	6	-	-	-	-	-	6	*	6	-	3	1	2	-
	8%	9%	-%	-%	-%	-%	-%	9%	4%	9%	-%	16%	6%	11%	-%
Time of collection	5	5	*	*	-	-	*	5	*	5	*	2	3	-	*
	7%	6%	15%	6%	-%	-%	10%	7%	3%	6%	11%	11%	12%	-%	2%
Trustworthiness of the provider	2	2	-	-	-	-	-	2	-	2	-	-	-	2	-
	3%	3%	-%	-%	-%	-%	-%	3%	-%	3%	-%	-%	-%	11%	-%
Account management (if applicable)	1	1	-	-	-	-	-	1	-	1	-	1	-	-	-
	2%	2%	-%	-%	-%	-%	-%	2%	-%	2%	-%	7%	-%	-%	-%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 78 (continuation) Page 646

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

Significance Level: 95%

Unweighted total

Weighted total

Don't know / na

Other

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	*b	*c	*d	*e	*f	a	*b	a	*b	*a	*b	*c	*d
78	53	12	9	1	3	25	61	17	72	6	17	22	15	24
79	74	2	2	*	*	4	66	13	76	3	20	22	20	17
4	4	-	*	-	-	*	4	*	4	*	4	*	-	-
6%	5%	-%	19%	-%	-%	7%	6%	4%	5%	11%	21%	1%	-%	-%
13	13	*	*	-	-	*	13	*	13	-	2	4	6	1
17%	18%	7%	11%	-%	-%	7%	19%	4%	18%	-%	11%	20%	31%	4%

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Table 78 (continuation)

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?**Base: All Respondents who use more than one mail service provider. Excluding those with no problems**

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	78	20	11	8	13	15	7	40	10	9	7	12	46	27	28	45
Weighted total	79	26	10	8	13	17	3	44	9	9	7	10	45	29	25	48
Damaged mail / goods	20	9	3	*	*	6	1	13	2	*	2	3	15	4	12	7
	26%	36%	30%	6%	1%	34%	54%	30%	21%	5%	27%	31%	34%	13%	46%	15%
Amount of lost mail	19	2	3	4	8	1	*	6	4	1	4	3	7	11	3	16
	24%	9%	25%	55%	60%	4%	4%	15%	47%	11%	61%	28%	16%	38%	11%	32%
Delivery reliability (e.g. arrives as promised)	15	2	2	3	2	6	*	8	3	2	2	-	9	7	9	7
	20%	8%	18%	40%	13%	37%	4%	18%	34%	24%	34%	-%	20%	23%	35%	14%
Lost or late delivery of sent mail	13	6	2	1	*	3	1	6	2	2	-	3	7	6	1	12
	17%	24%	19%	16%	2%	18%	20%	13%	23%	22%	-%	31%	16%	21%	6%	24%
Delivery time (when you receive your mail delivery)	11	2	2	-	4	2	-	6	2	2	-	*	7	4	4	7
	13%	9%	18%	-%	30%	14%	-%	14%	25%	20%	-%	3%	15%	14%	16%	13%
Collection reliability	7	-	1	*	2	2	-	4	3	-	*	*	7	*	2	4
	9%	-%	6%	6%	17%	13%	-%	9%	29%	-%	3%	1%	15%	1%	9%	9%
Wrong mail delivered / our mail delivered elsewhere	6	*	-	1	5	-	-	1	2	1	-	2	2	3	*	5
	8%	2%	-%	16%	35%	-%	-%	2%	23%	15%	-%	20%	5%	11%	2%	10%
Time of collection	5	*	-	*	2	2	-	3	2	-	-	*	5	*	-	5
	7%	2%	-%	1%	16%	14%	-%	6%	23%	-%	-%	3%	11%	*%	-%	11%
Trustworthiness of the provider	2	2	-	-	-	-	-	-	-	2	-	-	-	-	-	-
	3%	8%	-%	-%	-%	-%	-%	-%	-%	24%	-%	-%	-%	-%	-%	-%
Account management (if applicable)	1	1	-	-	-	-	-	1	-	-	-	-	1	-	-	1
	2%	5%	-%	-%	-%	-%	-%	3%	-%	-%	-%	-%	3%	-%	-%	3%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	*a	b
Unweighted total	78	20	11	8	13	15	7	4	40	10	9	7	12	46	27	28	45
Weighted total	79	26	10	8	13	17	3	2	44	9	9	7	10	45	29	25	48
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	4	2	2	-	*	-	-	-	4	*	-	*	-	4	*	2	2
	6%	7%	21%	-%	4%	-%	-%	-%	8%	4%	-%	7%	-%	9%	1%	9%	4%
Other	13	8	-	-	2	2	*	*	8	2	-	-	3	5	9	*	13
	17%	32%	-%	-%	16%	13%	18%	11%	19%	23%	-%	-%	27%	10%	30%	1%	27%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 78 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		*a	*b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	78	26	9	41	73	63	76	71	38	63	58	77	33	66	67
Weighted total	79	28	11	39	74	60	78	71	35	65	55	78	34	65	70
Damaged mail / goods	20	7	2	12	19	14	20	19	11	18	12	20	8	18	20
	26%	24%	17%	31%	25%	24%	26%	26%	30%	27%	22%	26%	22%	28%	28%
Amount of lost mail	19	7	4	8	18	16	18	19	8	18	16	19	11	16	18
	24%	25%	33%	21%	25%	27%	24%	26%	22%	28%	30%	24%	33%	25%	26%
Delivery reliability (e.g. arrives as promised)	15	*	2	13	15	15	15	15	9	13	12	15	7	13	15
	20%	%	22%	33%	21%	26%	20%	22%	25%	20%	23%	20%	20%	20%	22%
Lost or late delivery of sent mail	13	8	*	5	13	13	13	11	4	9	11	13	8	9	13
	17%	29%	1%	13%	18%	22%	17%	16%	10%	14%	20%	17%	23%	14%	19%
Delivery time (when you receive your mail delivery)	11	2	2	7	11	11	11	11	8	10	8	11	3	8	10
	13%	8%	16%	17%	14%	18%	14%	15%	23%	16%	15%	14%	8%	13%	15%
Collection reliability	7	*	-	6	7	6	7	7	6	7	3	7	4	4	7
	9%	2%	-	17%	9%	11%	9%	10%	18%	10%	6%	9%	13%	6%	10%
Wrong mail delivered / our mail delivered elsewhere	6	*	-	5	6	4	6	6	4	6	6	6	5	1	5
	8%	2%	-	12%	8%	6%	8%	8%	12%	9%	12%	8%	14%	1%	7%
Time of collection	5	1	-	5	5	5	5	5	4	5	3	5	5	3	5
	7%	2%	-	12%	7%	9%	7%	7%	12%	7%	5%	7%	14%	5%	7%
Trustworthiness of the provider	2	-	2	-	-	2	2	2	-	-	2	2	-	-	-
	3%	-	19%	-	-	4%	3%	3%	-	-	4%	3%	-	-	-
Account management (if applicable)	1	1	-	-	1	-	1	-	-	-	-	1	-	1	-
	2%	5%	-	-	2%	-	2%	-	-	-	-	2%	-	2%	-
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 78 (continuation) Page 650

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

Significance Level: 95%
Unweighted total
Weighted total
Problems with the Smart
Stamp online system

Don't know / na

Other

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
78	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	26	9	41	73	63	76	71	38	63	58	77	33	66	67
Weighted total	28	11	39	74	60	78	71	35	65	55	78	34	65	70
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	4	*	*	4	3	4	3	1	4	1	4	-	4	4
6%	13%	4%	1%	6%	4%	6%	4%	2%	7%	1%	6%	-%	7%	6%
Other	13	2	6	13	9	13	11	6	11	11	13	7	11	11
17%	21%	19%	14%	17%	15%	17%	16%	18%	17%	20%	16%	21%	16%	15%

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Table 78 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider. Excluding those with no problems

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%																
Unweighted total	78	12	3	61	78	69	78	67	78	-	57	77	36	24	8	46
Weighted total	79	14	3	59	79	66	79	65	79	-	56	79	32	24	11	43
Damaged mail / goods	20	4	3	15	20	18	20	19	20	-	15	20	10	11	2	8
	26%	25%	97%	25%	26%	27%	26%	29%	26%	-%	27%	26%	32%	45%	16%	18%
Amount of lost mail	19	6	*	12	19	16	19	13	19	-	14	19	8	5	6	8
	24%	43%	3%	21%	24%	24%	24%	20%	24%	-%	25%	24%	24%	21%	50%	18%
Delivery reliability (e.g. arrives as promised)	15	2	2	11	15	11	15	13	15	-	11	15	7	5	-	11
	20%	16%	56%	19%	20%	16%	20%	21%	20%	-%	20%	20%	21%	20%	-%	25%
Lost or late delivery of sent mail	13	-	-	13	13	7	13	9	13	-	9	13	6	5	5	3
	17%	-%	-%	22%	17%	11%	17%	13%	17%	-%	16%	17%	18%	22%	43%	7%
Delivery time (when you receive your mail delivery)	11	4	-	6	11	9	11	11	11	-	8	11	3	-	6	5
	13%	31%	-%	10%	13%	13%	13%	16%	13%	-%	15%	13%	9%	-%	53%	11%
Collection reliability	7	2	-	5	7	6	7	6	7	-	3	7	3	*	3	4
	9%	15%	-%	8%	9%	9%	9%	9%	9%	-%	6%	9%	10%	2%	23%	9%
Wrong mail delivered / our mail delivered elsewhere	6	2	-	3	6	6	6	6	6	-	6	6	5	-	2	4
	8%	15%	-%	5%	8%	10%	8%	10%	8%	-%	12%	8%	15%	-%	19%	10%
Time of collection	5	3	-	3	5	5	5	5	5	-	3	5	3	-	2	3
	7%	18%	-%	4%	7%	8%	7%	8%	7%	-%	5%	7%	8%	-%	21%	6%
Trustworthiness of the provider	2	-	-	-	2	2	2	2	2	-	2	2	-	-	-	2
	3%	-%	-%	-%	3%	3%	3%	3%	3%	-%	4%	3%	-%	-%	-%	5%
Account management (if applicable)	1	-	-	1	1	1	1	1	1	-	1	1	-	-	-	1
	2%	-%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	-%	-%	-%	3%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 78 (continuation) Page 652

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%																
Unweighted total	78	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Weighted total	79	12	3	61	78	69	78	67	78	-	57	77	36	24	8	46
		14	3	59	79	66	79	65	79	-	56	79	32	24	11	43
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	4	-	-	4	4	3	4	4	4	-	2	4	2	-	-	4
	6%	-%	-%	7%	6%	4%	6%	6%	6%	-%	4%	6%	7%	-%	-%	10%
Other	13	4	-	9	13	11	13	7	13	-	8	13	5	9	2	2
	17%	28%	-%	16%	17%	17%	17%	10%	17%	-%	15%	17%	15%	38%	16%	5%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 78 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider. Excluding those with no problems

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	*c	a	*b	a	*b	a	*b	a	b	a	*b
Unweighted total	78	36	13	28	59	19	78	-	51	7	35	39	50	8
Weighted total	79	41	10	27	61	17	79	-	50	5	33	42	49	5
Damaged mail / goods	20	11	1	8	17	3	20	-	18	2	10	11	9	2
	26%	27%	15%	28%	28%	17%	26%	-%	36%	35%	29%	26%	18%	45%
Amount of lost mail	19	11	3	5	11	7	19	-	10	2	7	12	13	2
	24%	27%	25%	18%	19%	41%	24%	-%	21%	35%	20%	28%	26%	38%
Delivery reliability (e.g. arrives as promised)	15	9	*	6	15	*	15	-	8	*	5	11	9	3
	20%	23%	5%	21%	25%	2%	20%	-%	17%	4%	14%	26%	18%	48%
Lost or late delivery of sent mail	13	10	3	*	10	3	13	-	9	*	9	4	10	-
	17%	24%	30%	1%	16%	19%	17%	-%	18%	6%	27%	10%	20%	-%
Delivery time (when you receive your mail delivery)	11	8	2	*	6	5	11	-	8	2	7	4	2	4
	13%	20%	21%	1%	10%	26%	13%	-%	17%	45%	21%	9%	4%	72%
Collection reliability	7	5	2	*	4	3	7	-	5	-	2	5	4	*
	9%	11%	16%	2%	6%	20%	9%	-%	9%	-%	7%	11%	8%	5%
Wrong mail delivered / our mail delivered elsewhere	6	3	2	1	4	2	6	-	5	*	3	3	6	-
	8%	6%	21%	4%	7%	12%	8%	-%	10%	9%	8%	6%	12%	-%
Time of collection	5	5	*	-	3	3	5	-	2	1	3	2	2	-
	7%	12%	3%	-%	4%	15%	7%	-%	5%	12%	9%	5%	5%	-%
Trustworthiness of the provider	2	2	-	-	2	-	2	-	-	-	-	-	-	-
	3%	5%	-%	-%	3%	-%	3%	-%	-%	-%	-%	-%	-%	-%
Account management (if applicable)	1	-	-	1	1	-	1	-	-	-	1	-	1	-
	2%	-%	-%	5%	2%	-%	2%	-%	-%	-%	4%	-%	3%	-%
Availability of a daily collection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 78 (continuation) Page 654

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	*b	*c	a	*b	a	*b	a	*b	a	b	a	*b
Unweighted total	78	36	13	28	59	78	-	51	7	35	39	50	8
Weighted total	79	41	10	27	61	79	-	50	5	33	42	49	5
Problems with the Smart Stamp online system	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know / na	4	-	-	4	*	4	-	2	-	2	2	1	-
	6%	-%	-%	16%	1%	6%	-%	5%	-%	6%	5%	2%	-%
Other	13	7	1	6	13	13	-	6	2	9	4	12	1
	17%	17%	8%	21%	21%	17%	-%	11%	35%	28%	10%	25%	15%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 78 (continuation)

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QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?
Base: All Respondents who use more than one mail service provider. Excluding those with no problems

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		*a	*b	*c	*d
Unweighted total	78	26	17	23	12
Weighted total	79	21	20	26	12
Damaged mail / goods	20	6	4	6	4
	26%	27%	22%	24%	34%
Amount of lost mail	19	5	1	10	2
	24%	25%	5%	39%	16%
Delivery reliability (e.g. arrives as promised)	15	9	2	4	-
	20%	43%	11%	17%	-%
Lost or late delivery of sent mail	13	*	6	3	4
	17%	1%	32%	12%	31%
Delivery time (when you receive your mail delivery)	11	6	-	2	2
	13%	29%	-%	8%	19%
Collection reliability	7	1	2	3	*
	9%	6%	12%	12%	2%
Wrong mail delivered / our mail delivered elsewhere	6	-	2	3	1
	8%	-%	11%	12%	11%
Time of collection	5	*	2	2	*
	7%	2%	11%	8%	4%
Trustworthiness of the provider	2	-	-	2	-
	3%	-%	-%	8%	-%
Account management (if applicable)	1	-	-	1	-
	2%	-%	-%	5%	-%
Availability of a daily collection	-	-	-	-	-
	-%	-%	-%	-%	-%
Latest collection time	-	-	-	-	-
	-%	-%	-%	-%	-%
No Problems	-	-	-	-	-
	-%	-%	-%	-%	-%
Wrong postage / shortfall on incoming mail - having to pay	-	-	-	-	-
	-%	-%	-%	-%	-%
Accessibility of the sorting office / opening hours	-	-	-	-	-
	-%	-%	-%	-%	-%
Problems with the Smart Stamp online system	-	-	-	-	-
	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d

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Table 78 (continuation) Page 656

QOP3. As a sender and recipient of mail, have you experienced any problems with your service from [QV5c provider] in the last 6 months?

Base: All Respondents who use more than one mail service provider. Excluding those with no problems

Significance Level: 95%
Unweighted total
Weighted total
Don't know / na

Other

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	*a	*b	*c	*d
78	26	17	23	12
79	21	20	26	12
4	3	2	-	-
6%	12%	9%	-%	-%
13	3	8	*	2
17%	13%	41%	2%	18%

The quality of the mail services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		^a	^b	^c	^d	^e	^f	^g	^h	ⁱ	^j	^k	^l	^m
Unweighted total	186	9	17	11	13	17	28	8	14	12	23	16	18	129
Weighted total	193	13	25	20	12	14	35	13	24	12	10	7	7	169
Very low	*	-	-	-	-	-	-	-	-	-	-	*	-	-
	%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	7%	-%	-%
Quite low	1	-	-	-	-	-	-	-	-	-	*	*	*	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	7%	7%	-%
Neither low nor high	20	-	2	-	1	3	4	4	6	-	*	-	*	20
	10%	-%	8%	-%	10%	18%	10%	28%	26%	-%	5%	-%	2%	12%
Quite high	75	7	7	11	4	2	16	2	7	9	2	3	3	67
	39%	58%	28%	55%	36%	16%	46%	15%	29%	76%	21%	46%	42%	39%
Very high	90	4	14	9	5	9	15	7	11	3	6	3	3	78
	47%	28%	55%	45%	43%	66%	43%	57%	45%	24%	68%	34%	49%	46%
Don't Know (DO NOT READ OUT)	6	2	2	-	1	-	-	-	-	-	*	*	-	5
	3%	14%	8%	-%	10%	-%	-%	-%	-%	-%	5%	7%	-%	3%
NET: High	165	11	21	20	10	12	32	9	18	12	8	6	6	144
	86%	86%	83%	100%	79%	82%	90%	72%	74%	100%	89%	80%	91%	85%
NET: Low	2	-	-	-	-	-	-	-	-	-	*	1	*	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	13%	7%	-%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 79 (continuation)

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The quality of the mail services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	186	141	21	9	5	10	45	126	60	171	15	73	50	21	42
Weighted total	193	184	4	2	1	2	8	145	48	189	4	86	50	20	37
Very low	*	*	-	-	-	-	-	-	*	*	-	-	*	-	-
	%	%	-	-	-	-	-	-	1%	%	-	-	1%	-	-
Quite low	1	1	*	-	-	-	*	*	1	1	-	-	*	-	1
	1%	1%	3%	-	-	-	1%	%	2%	1%	-	-	1%	-	2%
Neither low nor high	20	20	*	-	-	-	*	19	1	20	*	7	5	4	4
	10%	11%	3%	-	-	-	1%	13%	3%	11%	3%	8%	11%	20%	11%
		f						b							
Quite high	75	71	2	1	*	1	4	49	26	74	1	31	15	11	18
	39%	39%	39%	71%	36%	42%	46%	34%	55%	39%	22%	36%	30%	55%	50%
								a							b
Very high	90	86	2	*	1	1	4	73	17	87	3	44	27	5	14
	47%	47%	55%	29%	64%	58%	52%	50%	36%	46%	75%	51%	54%	25%	38%
Don't Know (DO NOT READ OUT)	6	6	-	-	-	-	-	4	2	6	-	4	2	-	-
	3%	3%	-	-	-	-	-	3%	4%	3%	-	5%	4%	-	-
NET: High	165	157	4	2	1	2	8	122	43	161	4	75	42	16	32
	86%	85%	95%	100%	100%	100%	97%	84%	90%	85%	97%	87%	84%	80%	88%
							a								
NET: Low	2	1	*	-	-	-	*	*	1	2	-	-	1	-	1
	1%	1%	3%	-	-	-	1%	%	3%	1%	-	-	2%	-	2%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 79 (continuation)

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The quality of the mail services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	*d	*e	*f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	186	66	36	23	26	26	9	-	124	19	15	14	14	107	57	67	97
Weighted total	193	77	38	26	26	24	2	-	130	20	18	17	8	105	65	64	106
Very low	*	*	-	-	-	-	-	-	*	-	-	-	-	-	*	-	*
	%	1%	-%	-%	-%	-%	-%	-%	%	-%	-%	-%	-%	-%	1%	-%	%
Quite low	1	-	-	*	-	1	-	-	-	*	*	-	*	1	*	1	*
	1%	-%	-%	2%	-%	3%	-%	-%	-%	2%	3%	-%	1%	1%	%	2%	%
Neither low nor high	20	9	3	1	7	*	-	-	8	5	3	4	-	12	3	8	7
	10%	11%	7%	5%	29%	%	-%	-%	6%	24%	20%	23%	-%	12%	5%	12%	7%
Quite high	75	27	12	12	13	9	1	-	47	6	8	10	4	45	20	29	36
	39%	35%	30%	47%	52%	40%	67%	-%	36%	30%	44%	60%	53%	42%	31%	45%	34%
Very high	90	38	24	12	2	13	1	-	69	9	6	3	4	46	39	24	60
	47%	49%	63%	46%	7%	57%	33%	-%	53%	43%	34%	16%	46%	43%	60%	38%	56%
														a			a
Don't Know (DO NOT READ OUT)	6	3	-	-	3	-	-	-	6	-	-	-	-	2	2	2	2
	3%	4%	-%	-%	12%	-%	-%	-%	5%	-%	-%	-%	-%	2%	3%	3%	2%
NET: High	165	65	36	24	15	23	2	-	116	15	14	13	8	90	59	53	97
	86%	84%	93%	93%	59%	97%	100%	-%	89%	73%	78%	77%	99%	86%	92%	83%	91%
NET: Low	2	*	-	*	-	1	-	-	*	*	*	-	*	1	1	1	1
	1%	1%	-%	2%	-%	3%	-%	-%	%	2%	3%	-%	1%	1%	1%	2%	1%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 79 (continuation)

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The quality of the mail services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	77	39	67	164	116	169	146	56	139	124	169	61	125	117
Weighted total	193	79	42	166	109	175	150	39	145	125	171	53	120	122
Very low	*	-	-	*	-	*	*	-	*	*	*	*	*	*
*%	-%	-%	1%	*%	-%	*%	*%	-%	*%	*%	*%	1%	*%	*%
Quite low	1	-	1	1	1	1	1	*	1	1	1	*	1	1
1%	-%	-%	2%	1%	1%	1%	1%	1%	1%	*%	1%	1%	*%	1%
Neither low nor high	20	9	3	15	14	17	19	5	13	14	17	4	13	13
10%	11%	8%	11%	9%	13%	10%	12%	14%	9%	12%	10%	7%	11%	11%
Quite high	75	29	13	67	50	71	56	16	61	50	69	24	51	47
39%	37%	32%	45%	40%	46%	41%	38%	40%	42%	40%	41%	46%	42%	38%
Very high	90	38	22	78	41	80	69	16	65	57	78	24	52	59
47%	48%	53%	42%	47%	38%	46%	46%	41%	45%	45%	46%	46%	43%	48%
Don't Know (DO NOT READ OUT)	6	3	3	5	3	5	4	2	3	2	5	-	3	2
3%	4%	7%	-%	3%	3%	3%	3%	5%	2%	2%	3%	-%	3%	1%
NET: High	165	67	35	145	91	151	126	31	126	107	147	48	102	106
86%	85%	84%	86%	87%	84%	87%	84%	81%	87%	86%	86%	91%	86%	87%
NET: Low	2	-	-	2	1	2	2	*	2	1	2	1	1	1
1%	-%	-%	2%	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 79 (continuation)

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The quality of the mail services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	*a	*b	c	a	b	c	d	e	*f	a	b	c	a	*b	c
Unweighted total	186	26	-	135	183	166	184	162	185	-	138	185	71	35	20
Weighted total	193	28	-	139	187	172	189	167	193	-	138	191	67	34	22
Very low	*	-	-	*	*	*	*	*	*	-	*	*	*	*	-
	*%	-%	-%	*%	*%	*%	*%	*%	-%	*%	*%	1%	1%	-%	-%
Quite low	1	-	-	1	1	1	1	1	1	-	1	1	1	1	-
	1%	-%	-%	1%	1%	*%	1%	1%	1%	-%	1%	1%	1%	2%	-%
Neither low nor high	20	*	-	15	18	17	20	16	20	-	14	20	6	3	3
	10%	2%	-%	11%	10%	10%	11%	9%	10%	-%	10%	11%	9%	10%	14%
Quite high	75	12	-	51	73	71	73	66	75	-	57	75	28	14	9
	39%	45%	-%	36%	39%	41%	39%	40%	39%	-%	41%	39%	42%	41%	41%
Very high	90	13	-	70	88	76	88	78	90	-	61	88	32	16	10
	47%	47%	-%	50%	47%	44%	47%	47%	47%	-%	44%	46%	47%	46%	45%
Don't Know (DO NOT READ OUT)	6	2	-	2	6	6	6	5	6	-	5	6	-	-	6
	3%	7%	-%	1%	3%	4%	3%	3%	3%	-%	4%	3%	-%	-%	5%
NET: High	165	25	-	121	161	147	161	144	165	-	118	163	60	29	19
	86%	92%	-%	87%	86%	86%	85%	86%	86%	-%	85%	85%	89%	87%	86%
NET: Low	2	-	-	2	2	1	2	2	2	-	2	2	1	1	-
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	3%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 79 (continuation)

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The quality of the mail services provided by [QV5c provider] in the last 12 months (QOP4). On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	*b	c	a	b	a	*b	a	*b	a	b	a	*b
Unweighted total	186	59	15	105	129	57	180	6	103	129	12	62	99
Weighted total	193	64	20	105	136	56	188	5	115	122	105	172	2
Very low	*	*	-	-	-	*	*	*	*	*	*	*	*
	1%	1%	0%	0%	1%	1%	1%	1%	1%	1%	1%	1%	25%
Quite low	1	1	-	*	1	-	1	-	1	-	*	-	*
	1%	1%	0%	1%	1%	0%	1%	0%	1%	0%	1%	0%	6%
Neither low nor high	20	8	5	7	12	8	20	-	9	4	6	10	4
	10%	12%	24%	7%	9%	14%	11%	0%	8%	37%	9%	9%	69%
Quite high	75	27	5	41	55	20	75	-	43	3	24	39	74
	39%	43%	27%	39%	40%	35%	40%	0%	38%	25%	39%	37%	43%
Very high	90	28	10	52	63	27	88	2	60	3	28	55	90
	47%	44%	49%	49%	46%	48%	47%	48%	52%	23%	45%	53%	52%
Don't Know (DO NOT READ OUT)	6	-	-	4	5	1	4	3	2	2	4	-	4
	3%	0%	0%	4%	4%	2%	2%	52%	2%	15%	6%	0%	3%
NET: High	165	55	15	93	118	47	163	2	103	6	52	94	163
	86%	86%	76%	89%	86%	83%	87%	48%	90%	48%	84%	90%	95%
NET: Low	2	1	-	*	1	*	2	-	1	-	1	1	-
	1%	2%	0%	1%	1%	1%	1%	0%	1%	0%	1%	1%	0%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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The quality of the mail services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	Quarter	
		Q1 2013	Q2 2013
Significance Level: 95%		a	b
Unweighted total	186	104	82
Weighted total	193	99	93
Very low	*	*	-
	*%	*%	-%
Quite low	1	1	*
	1%	1%	*%
Neither low nor high	20	11	9
	10%	11%	9%
Quite high	75	46	28
	39%	47%	30%
		b	
Very high	90	38	52
	47%	39%	55%
		a	
Don't Know (DO NOT READ OUT)	6	2	4
	3%	2%	5%
NET: High	165	85	80
	86%	85%	86%
NET: Low	2	1	*
	1%	1%	*%
Columns Tested: a,b			

The price of the postal services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m
Unweighted total	186	9	17	11	13	17	28	8	14	12	23	16	18	129
Weighted total	193	13	25	20	12	14	35	13	24	12	10	7	7	169
Very low	4	-	-	-	-	1	2	-	-	-	*	-	-	3
	2%	-%	-%	-%	-%	9%	5%	-%	-%	-%	5%	-%	-%	2%
Quite low	7	2	-	-	-	1	-	-	2	-	*	*	1	5
	4%	14%	-%	-%	-%	9%	-%	-%	9%	-%	5%	7%	14%	3%
Neither low nor high	39	*	5	5	2	4	7	4	7	3	*	*	2	36
	20%	1%	18%	27%	13%	29%	21%	29%	28%	21%	5%	7%	30%	21%
Quite high	71	11	5	9	7	4	11	2	7	5	4	4	3	60
	37%	84%	19%	45%	54%	25%	31%	14%	28%	42%	41%	53%	47%	35%
Very high	67	-	16	5	3	4	15	7	8	3	3	2	*	62
	35%	-%	63%	27%	22%	29%	43%	57%	35%	23%	32%	26%	7%	36%
Don't Know (DO NOT READ OUT)	5	*	-	-	1	-	-	-	*	2	1	1	*	3
	3%	1%	-%	-%	10%	-%	-%	-%	1%	14%	11%	8%	2%	2%
NET: High	138	11	21	14	9	8	26	9	15	8	7	6	4	121
	71%	84%	82%	73%	76%	53%	74%	71%	62%	65%	74%	79%	54%	72%
NET: Low	11	2	-	-	-	3	2	-	2	-	1	*	1	8
	6%	14%	-%	-%	-%	18%	5%	-%	9%	-%	10%	7%	14%	5%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

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The price of the postal services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	186	141	21	9	5	10	45	126	60	171	15	73	50	21	42
Weighted total	193	184	4	2	1	2	8	145	48	189	4	86	50	20	37
Very low	4	4	-	-	-	-	-	-	4	4	-	2	1	*	-
	2%	2%	-%	-%	-%	-%	-%	-%	7%	2%	-%	2%	3%	2%	-%
									a						
Quite low	7	7	-	-	-	-	-	3	4	7	-	4	2	-	1
	4%	4%	-%	-%	-%	-%	-%	2%	8%	4%	-%	5%	4%	-%	3%
Neither low nor high	39	37	1	*	*	1	2	33	6	39	1	20	6	5	8
	20%	20%	22%	20%	16%	31%	23%	23%	14%	20%	18%	23%	13%	25%	22%
Quite high	71	68	2	*	*	3	3	52	19	68	2	24	22	9	15
	37%	37%	41%	23%	48%	20%	34%	36%	40%	36%	51%	28%	45%	44%	42%
Very high	67	65	2	*	*	2	2	53	14	67	*	33	17	6	12
	35%	35%	38%	29%	36%	6%	30%	37%	29%	35%	11%	38%	34%	28%	33%
Don't Know (DO NOT READ OUT)	5	4	-	*	-	1	1	4	1	4	1	3	1	*	1
	3%	2%	-%	27%	-%	43%	14%	3%	2%	2%	20%	4%	3%	1%	1%
							a								
NET: High	138	132	3	1	1	*	5	105	33	135	3	57	39	14	27
	71%	72%	78%	52%	84%	26%	63%	72%	69%	72%	62%	66%	79%	72%	74%
NET: Low	11	11	-	-	-	-	-	3	7	11	-	6	3	*	1
	6%	6%	-%	-%	-%	-%	-%	2%	16%	6%	-%	7%	6%	2%	3%
									a						

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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The price of the postal services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	*d	*e	*f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	186	66	36	23	26	26	9	-	124	19	15	14	14	107	57	67	97
Weighted total	193	77	38	26	26	24	2	-	130	20	18	17	8	105	65	64	106
Very low	4	2	1	*	-	-	-	-	2	-	1	-	-	*	1	*	1
	2%	2%	3%	2%	-%	-%	-%	-%	2%	-%	7%	-%	-%	*%	2%	1%	1%
Quite low	7	3	*	1	-	2	*	-	5	2	-	-	*	5	*	1	5
	4%	3%	1%	5%	-%	10%	22%	-%	4%	9%	-%	-%	6%	5%	1%	2%	5%
Neither low nor high	39	23	4	4	6	2	*	-	28	2	2	6	1	27	8	18	17
	20%	30%	10%	14%	25%	7%	15%	-%	21%	9%	13%	36%	16%	25%	12%	28%	16%
		b															
Quite high	71	21	20	8	12	8	1	-	45	6	10	6	4	40	23	30	33
	37%	27%	52%	33%	47%	34%	48%	-%	34%	29%	56%	35%	50%	38%	36%	47%	31%
		a														b	
Very high	67	25	12	12	6	11	*	-	47	9	4	5	2	31	30	13	49
	35%	33%	32%	46%	22%	48%	15%	-%	36%	44%	24%	29%	25%	30%	46%	20%	46%
															a		a
Don't Know (DO NOT READ OUT)	5	3	*	*	1	*	-	-	3	2	-	-	*	2	2	2	2
	3%	4%	1%	1%	6%	1%	-%	-%	2%	9%	-%	-%	4%	2%	3%	3%	2%
NET: High	138	46	32	20	18	19	1	-	92	15	14	11	6	71	53	43	81
	71%	60%	84%	78%	70%	82%	63%	-%	71%	73%	80%	64%	75%	67%	82%	67%	77%
		a													a		
NET: Low	11	4	2	2	-	2	*	-	7	2	1	-	*	6	2	1	6
	6%	6%	5%	7%	-%	10%	22%	-%	5%	9%	7%	-%	6%	6%	3%	2%	6%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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The price of the postal services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	77	39	67	164	116	169	146	56	139	124	169	61	125	117
Weighted total	193	79	42	166	109	175	150	39	145	125	171	53	120	122
Very low	4	3	*	*	*	*	2	*	*	*	*	2	*	*
2%	4%	1%	-%	1%	1%	1%	1%	1%	1%	1%	1%	3%	1%	1%
												b		
Quite low	7	3	3	5	5	5	4	*	7	3	5	*	3	4
4%	4%	7%	1%	3%	4%	3%	2%	1%	5%	3%	3%	1%	3%	3%
Neither low nor high	39	20	5	33	25	37	29	8	25	28	34	14	25	21
20%	25%	13%	20%	20%	23%	21%	20%	21%	17%	23%	20%	26%	21%	17%
Quite high	71	22	21	66	40	68	57	14	60	44	69	23	45	49
37%	28%	51%	37%	40%	37%	39%	38%	36%	41%	35%	40%	43%	38%	40%
		a												
Very high	67	29	10	58	37	60	57	15	51	48	59	14	43	47
35%	37%	23%	39%	35%	34%	34%	38%	39%	35%	39%	34%	26%	36%	38%
Don't Know (DO NOT READ OUT)	5	2	2	4	2	4	1	*	2	1	4	*	3	*
3%	2%	4%	2%	2%	2%	2%	1%	1%	1%	1%	2%	1%	3%	1%
NET: High	138	51	31	124	77	128	114	29	111	92	127	37	88	96
71%	65%	74%	76%	75%	71%	74%	76%	75%	77%	74%	75%	69%	73%	79%
NET: Low	11	6	4	5	5	5	5	1	7	4	5	2	4	4
6%	8%	9%	1%	3%	5%	3%	4%	2%	5%	3%	3%	4%	3%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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The price of the postal services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		*a	*b	c	a	b	c	d	e	*f	a	b	c	a	*b	c
Unweighted total	186	26	-	135	183	166	184	162	185	-	138	185	71	35	20	130
Weighted total	193	28	-	139	187	172	189	167	193	-	138	191	67	34	22	135
Very low	4	-	-	*	4	2	4	2	4	-	2	4	4	-	-	2
	2%	-%	-%	*%	2%	1%	2%	1%	2%	-%	2%	2%	5%	-%	-%	2%
Quite low	7	2	-	4	5	5	5	5	7	-	5	5	*	2	2	4
	4%	8%	-%	3%	3%	3%	3%	3%	4%	-%	3%	3%	1%	5%	8%	3%
Neither low nor high	39	2	-	32	37	36	39	34	39	-	30	39	20	7	5	27
	20%	6%	-%	23%	20%	21%	21%	20%	20%	-%	22%	21%	30%	22%	20%	20%
Quite high	71	12	-	50	69	62	69	63	71	-	53	71	25	14	4	53
	37%	44%	-%	36%	37%	36%	36%	38%	37%	-%	38%	37%	37%	42%	16%	39%
Very high	67	12	-	50	67	61	67	59	67	-	45	67	17	11	12	44
	35%	42%	-%	36%	36%	36%	35%	36%	35%	-%	33%	35%	26%	31%	56%	33%
Don't Know (DO NOT READ OUT)	5	-	-	4	5	4	5	3	5	-	3	5	*	*	-	5
	3%	-%	-%	3%	3%	3%	3%	2%	3%	-%	2%	3%	*%	1%	-%	4%
NET: High	138	24	-	99	136	124	136	122	138	-	98	138	43	25	16	97
	71%	86%	-%	72%	73%	72%	72%	73%	71%	-%	71%	72%	64%	73%	72%	72%
NET: Low	11	2	-	4	9	7	9	7	11	-	7	9	4	2	2	6
	6%	8%	-%	3%	5%	4%	5%	4%	6%	-%	5%	5%	6%	5%	8%	4%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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The price of the postal services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	*b	a	b	a	*b
Unweighted total	186	59	15	105	129	57	180	6	103	12	62	99	166	3
Weighted total	193	64	20	105	136	56	188	5	115	12	62	105	172	2
Very low	4	1	-	2	3	*	4	-	*	-	-	*	2	1
	2%	2%	-%	2%	2%	1%	2%	-%	*%	-%	-%	*%	1%	69%
Quite low	7	*	-	7	7	-	7	-	5	-	3	3	6	-
	4%	1%	-%	6%	5%	-%	4%	-%	5%	-%	5%	2%	3%	-%
Neither low nor high	39	9	3	27	20	20	38	1	22	7	13	20	31	-
	20%	14%	17%	25%	15%	35% a	20%	26%	19%	56%	21%	19%	18%	-%
Quite high	71	26	9	35	50	21	70	*	42	5	22	40	67	1
	37%	40%	46%	33%	36%	37%	37%	10%	37%	41%	35%	38%	39%	31%
Very high	67	27	6	31	53	14	65	2	42	*	20	41	62	-
	35%	42%	31%	30%	39%	24% b	35%	43%	37%	3%	33%	39%	36%	-%
Don't Know (DO NOT READ OUT)	5	*	1	3	3	2	4	1	2	-	3	1	3	-
	3%	*%	6%	3%	2%	3%	2%	22%	2%	-%	5%	1%	2%	-%
NET: High	138	53	15	67	103	35	135	3	84	5	42	81	130	1
	71%	83%	76%	63%	76%	61%	72%	52%	73%	44%	68%	77%	75%	31%
		c			b									
NET: Low	11	2	-	9	10	*	11	-	6	-	3	3	8	1
	6%	3%	-%	8%	7%	1%	6%	-%	5%	-%	5%	3%	5%	69%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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The price of the postal services provided by [QV5c provider] in the last 12 months (QOP4. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects:)

Base: All respondents with more than one mail service provider

	TOTAL	Quarter	
		Q1 2013	Q2 2013
Significance Level: 95%		a	b
Unweighted total	186	104	82
Weighted total	193	99	93
Very low	4	4	-
	2%	4%	-%
Quite low	7	1	6
	4%	1%	6%
Neither low nor high	39	19	20
	20%	20%	21%
Quite high	71	31	40
	37%	31%	43%
Very high	67	40	27
	35%	41%	28%
Don't Know (DO NOT READ OUT)	5	4	2
	3%	4%	2%
NET: High	138	71	66
	71%	72%	71%
NET: Low	11	5	6
	6%	5%	6%
Columns Tested: a,b			

Table 81

QOP4. SUMMARY. On a scale of 1 to 5 where 5 is very high and 1 is very low how would you rate [QV5c provider] on each of the following aspects ...

Base: All respondents with more than one mail service provider

Aspects		
	The quality of the mail services provided by [QV5c provider] in the last 12 months	The price of the postal services provided by [QV5c provider] in the last 12 months
Significance Level: 95%	a	b
Unweighted total	186	186
Weighted total	193	193
Very low	*	4
	*%	2%
Quite low	1	7
	1%	4%
		a
Neither low nor high	20	39
	10%	20%
		a
Quite high	75	71
	39%	37%
Very high	90	67
	47%	35%
	b	
Don't Know (DO NOT READ OUT)	6	5
	3%	3%
NET: High	165	138
	86%	71%
	b	
NET: Low	2	11
	1%	6%
		a

Columns Tested: a,b

QOP5. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from [QV5c provider]?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Very Dissatisfied

Fairly Dissatisfied

Neither Satisfied Nor

Dissatisfied

Fairly Satisfied

Very Satisfied

Don't Know (DO NOT READ

OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
186	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m
193	9	17	11	13	17	28	8	14	12	23	16	18	129
	13	25	20	12	14	35	13	24	12	10	7	7	169
	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	-	-	-	-	1	-	-	-	-	-	*	-	1
1%	-%	-%	-%	-%	9%	-%	-%	-%	-%	-%	7%	-%	1%
20	2	-	-	-	1	4	4	6	1	1	*	1	18
10%	14%	-%	-%	-%	9%	10%	28%	26%	11%	6%	7%	9%	11%
82	9	9	9	3	3	15	*	13	9	3	4	4	71
42%	72%	36%	45%	25%	23%	42%	1%	55%	74%	31%	53%	53%	42%
88	2	16	11	8	8	17	9	5	2	6	2	3	77
46%	14%	64%	55%	64%	58%	48%	71%	19%	15%	63%	28%	39%	46%
2	-	-	-	1	-	-	-	-	-	-	*	-	1
1%	-%	-%	-%	10%	-%	-%	-%	-%	-%	-%	7%	-%	1%
170	11	25	20	11	12	32	9	18	11	9	6	6	149
88%	86%	100%	100%	90%	82%	90%	72%	74%	89%	94%	80%	91%	88%
2	-	-	-	-	1	-	-	-	-	-	*	-	1
1%	-%	-%	-%	-%	9%	-%	-%	-%	-%	-%	7%	-%	1%

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Table 82 (continuation)

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QOP5. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from [QV5c provider]?

Base: All Respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	186	141	21	9	5	10	45	126	60	171	15	73	50	21	42
Weighted total	193	184	4	2	1	2	8	145	48	189	4	86	50	20	37
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	2	2	-	-	-	-	-	-	2	2	-	-	2	-	-
	1%	1%	-%	-%	-%	-%	-%	-%	4%	1%	-%	-%	4%	-%	-%
									a						
Neither Satisfied Nor Dissatisfied	20	19	*	-	-	-	*	17	3	19	*	6	6	5	2
	10%	10%	5%	-%	-%	-%	3%	12%	6%	10%	3%	6%	13%	26%	6%
Fairly Satisfied	82	78	2	1	1	1	4	56	26	81	1	30	25	8	18
	42%	42%	42%	59%	64%	31%	45%	39%	54%	43%	18%	35%	50%	41%	49%
Very Satisfied	88	84	2	1	*	1	4	71	17	85	3	48	17	7	16
	46%	45%	53%	41%	36%	69%	52%	49%	37%	45%	80%	56%	33%	33%	44%
												b			
Don't Know (DO NOT READ OUT)	2	2	-	-	-	-	-	2	-	2	-	2	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	2%	-%	-%	-%
NET: Satisfied	170	161	4	2	1	2	8	127	43	166	4	78	42	15	34
	88%	88%	95%	100%	100%	100%	97%	87%	90%	88%	97%	91%	84%	74%	94%
NET: Dissatisfied	2	2	-	-	-	-	-	-	2	2	-	-	2	-	-
	1%	1%	-%	-%	-%	-%	-%	-%	4%	1%	-%	-%	4%	-%	-%
									a						

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 82 (continuation)

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QOP5. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from [QV5c provider]?

Base: All Respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	*d	*e	*f	*g	a	*b	*c	*d	*e	a	b	a	b
Unweighted total	186	66	36	23	26	26	9	-	124	19	15	14	14	107	57	67	97
Weighted total	193	77	38	26	26	24	2	-	130	20	18	17	8	105	65	64	106
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	2	-	1	*	-	-	-	-	-	*	1	-	-	*	1	*	1
	1%	-%	3%	2%	-%	-%	-%	-%	-%	2%	7%	-%	-%	*%	2%	1%	1%
Neither Satisfied Nor Dissatisfied	20	9	-	3	5	2	-	-	10	5	3	2	*	12	5	7	9
	10%	12% b	-%	10%	21%	11%	-%	-%	7%	27%	15%	11%	1%	11%	7%	12%	8%
Fairly Satisfied	82	27	16	11	17	10	2	-	50	7	7	12	4	40	31	26	45
	42%	35%	41%	41%	66%	42%	78%	-%	39%	37%	41%	73%	54%	38%	48%	40%	42%
Very Satisfied	88	40	21	12	2	11	*	-	68	7	6	3	4	52	28	29	52
	46%	53%	56%	48%	8%	48%	22%	-%	53%	33%	37%	16%	44%	50%	43%	45%	48%
Don't Know (DO NOT READ OUT)	2	*	-	-	1	-	-	-	2	-	-	-	-	1	-	1	-
	1%	1%	-%	-%	5%	-%	-%	-%	1%	-%	-%	-%	-%	1%	-%	2%	-%
NET: Satisfied	170	67	37	23	19	21	2	-	119	14	14	15	8	92	59	54	97
	88%	88%	97%	88%	74%	89%	100%	-%	91%	71%	78%	89%	99%	87%	91%	85%	91%
NET: Dissatisfied	2	-	1	*	-	-	-	-	-	*	1	-	-	*	1	*	1
	1%	-%	3%	2%	-%	-%	-%	-%	-%	2%	7%	-%	-%	*%	2%	1%	1%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 82 (continuation)

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QOP5. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from [QV5c provider]?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Very Dissatisfied

Fairly Dissatisfied

Neither Satisfied Nor

Dissatisfied

Fairly Satisfied

Very Satisfied

Don't Know (DO NOT READ
OUT)

NET: Satisfied

NET: Dissatisfied

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
186	77	39	67	164	116	169	146	56	139	124	169	61	125	117
193	79	42	69	166	109	175	150	39	145	125	171	53	120	122
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
2	1	-	*	*	*	*	2	*	*	-	*	1	*	*
1%	2%	-%	1%	1%	1%	1%	1%	1%	1%	-%	1%	2%	1%	1%
20	8	5	6	17	15	20	18	2	17	16	20	3	13	14
10%	11%	13%	9%	10%	14%	11%	12%	5%	12%	13%	11%	6%	11%	11%
82	27	19	34	71	48	75	62	24	64	52	73	26	56	50
42%	34%	45%	49%	43%	44%	43%	41%	62%	44%	42%	43%	48%	46%	41%
							abcd							
88	42	16	29	76	43	79	68	12	61	56	76	23	49	58
46%	53%	39%	41%	46%	40%	45%	46%	32%	42%	45%	44%	43%	41%	48%
2	*	1	-	1	1	1	-	-	1	-	1	-	1	-
1%	1%	3%	-%	1%	1%	1%	-%	-%	1%	-%	1%	-%	1%	-%
170	69	35	63	147	92	153	130	37	125	108	149	48	105	108
88%	87%	84%	91%	88%	84%	88%	87%	94%	87%	87%	87%	91%	87%	88%
2	1	-	*	*	*	*	2	*	*	-	*	1	*	*
1%	2%	-%	1%	1%	1%	1%	1%	1%	1%	-%	1%	2%	1%	1%

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Table 82 (continuation)

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QOP5. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from [QV5c provider]?

Base: All Respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%																
Unweighted total	186	26	-	135	183	166	184	162	185	-	138	185	71	35	20	130
Weighted total	193	28	-	139	187	172	189	167	193	-	138	191	67	34	22	135
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	2	-	-	*	2	*	2	*	2	-	*	2	2	*	-	-
	1%	-%	-%	*%	1%	*%	1%	*%	1%	-%	*%	1%	3%	1%	-%	-%
Neither Satisfied Nor Dissatisfied	20	2	-	12	20	17	20	18	20	-	18	20	3	4	3	13
	10%	8%	-%	8%	10%	10%	10%	11%	10%	-%	13%	10%	5%	11%	14%	9%
Fairly Satisfied	82	17	-	54	77	78	80	71	82	-	60	80	33	17	9	56
	42%	61%	-%	39%	41%	45%	42%	43%	42%	-%	43%	42%	50%	49%	39%	42%
Very Satisfied	88	9	-	72	86	74	86	76	88	-	59	88	29	13	11	64
	46%	31%	-%	52%	46%	43%	46%	45%	46%	-%	43%	46%	43%	39%	47%	47%
Don't Know (DO NOT READ OUT)	2	-	-	1	2	2	2	1	2	-	1	2	-	-	-	2
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	1%	1%	-%	-%	-%	1%
NET: Satisfied	170	25	-	125	164	152	166	147	170	-	119	168	62	30	19	120
	88%	92%	-%	90%	88%	89%	88%	88%	88%	-%	86%	88%	92%	88%	86%	89%
NET: Dissatisfied	2	-	-	*	2	*	2	*	2	-	*	2	2	*	-	-
	1%	-%	-%	*%	1%	*%	1%	*%	1%	-%	*%	1%	3%	1%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 82 (continuation)

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QOP5. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from [QV5c provider]?

Base: All Respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	*b	a	b	a	*b
Unweighted total	186	59	15	105	129	57	180	6	103	12	62	99	166	3
Weighted total	193	64	20	105	136	56	188	5	115	12	62	105	172	2
Very Dissatisfied	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Fairly Dissatisfied	2	2	-	-	2	-	2	-	*	-	-	*	-	1
	1%	3%	-%	-%	1%	-%	1%	-%	*%	-%	-%	*%	-%	69%
Neither Satisfied Nor Dissatisfied	20	8	4	8	12	8	20	-	12	2	6	8	7	1
	10%	13%	18%	7%	9%	14%	10%	-%	10%	19%	10%	8%	4%	31%
Fairly Satisfied	82	35	7	40	57	24	82	-	48	5	23	47	77	-
	42%	54%	35%	38%	42%	43%	43%	-%	42%	43%	38%	45%	45%	-%
Very Satisfied	88	19	9	57	64	24	84	4	54	5	31	49	88	-
	46%	30%	47%	a	47%	43%	44%	90%	47%	38%	50%	47%	51%	-%
Don't Know (DO NOT READ OUT)	2	-	-	2	1	*	1	*	1	-	1	-	-	-
	1%	-%	-%	2%	1%	1%	1%	10%	1%	-%	2%	-%	-%	-%
NET: Satisfied	170	54	16	96	121	48	165	4	102	10	55	96	165	-
	88%	84%	82%	91%	89%	86%	88%	90%	88%	81%	88%	92%	96%	-%
NET: Dissatisfied	2	2	-	-	2	-	2	-	*	-	-	*	-	1
	1%	3%	-%	-%	1%	-%	1%	-%	*%	-%	-%	*%	-%	69%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 82 (continuation)

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QOP5. And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from [QV5c provider]?

Base: All Respondents

	TOTAL	Quarter	
		Q1 2013	Q2 2013
Significance Level: 95%		a	b
Unweighted total	186	104	82
Weighted total	193	99	93
Very Dissatisfied	-	-	-
	-%	-%	-%
Fairly Dissatisfied	2	2	-
	1%	2%	-%
Neither Satisfied Nor Dissatisfied	20	12	7
	10%	12%	8%
Fairly Satisfied	82	41	40
	42%	42%	43%
Very Satisfied	88	42	46
	46%	42%	49%
Don't Know (DO NOT READ OUT)	2	2	-
	1%	2%	-%
NET: Satisfied	170	83	86
	88%	84%	92%
NET: Dissatisfied	2	2	-
	1%	2%	-%
Columns Tested: a,b			

QAP1. On a scale of 1 to 5 where 5 is agree very strongly and 1 is disagree very strongly, please tell me how strongly you agree or disagree that mail services in the UK provide good value for money
Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Disagree very strongly

Disagree

Neither Agree nor

disagree

Agree

Agree very strongly

Don't Know (DO NOT READ
OUT)

NET: Agree

NET: Disagree

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
789	a	b	c	d	e	f	g	h	i	j	k	l	m
809	35	51	40	53	60	89	52	64	37	106	108	94	481
	53	88	65	54	65	120	82	116	38	45	46	37	681
29	-	2	*	-	4	4	5	6	3	3	2	1	24
4%	-%	2%	*%	-%	6%	3%	7%	5%	7%	6%	4%	2%	4%
76	9	6	4	7	5	20	7	8	*	3	2	3	67
9%	17%	7%	6%	13%	8%	17%	9%	7%	*%	6%	5%	9%	10%
	ik			l		ijk							
257	20	20	20	17	23	35	20	46	14	12	13	16	216
32%	38%	23%	31%	32%	36%	29%	24%	40%	36%	26%	29%	44%	32%
												bfgjkm	
310	16	38	30	23	24	50	33	31	17	18	16	11	264
38%	31%	43%	47%	43%	38%	42%	40%	27%	45%	41%	35%	31%	39%
			h										
130	7	22	9	6	6	11	16	24	2	9	12	5	104
16%	14%	24%	14%	12%	10%	9%	20%	21%	4%	21%	26%	14%	15%
		efi					i	fi		fi	defilm		
7	*	-	2	-	1	-	-	-	3	*	*	-	6
1%	*%	-%	3%	-%	2%	-%	-%	-%	7%	*%	1%	-%	1%
								dfhjklm					
440	24	60	39	30	31	61	49	55	19	27	28	17	367
54%	45%	68%	61%	55%	48%	51%	60%	47%	50%	61%	61%	45%	54%
		aehl								l	l		
105	9	8	4	7	9	24	13	15	3	5	4	4	92
13%	17%	10%	6%	13%	14%	20%	16%	13%	7%	12%	9%	11%	13%
						ck							

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Table 83 (continuation)

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QAP1. On a scale of 1 to 5 where 5 is agree very strongly and 1 is disagree very strongly, please tell me how strongly you agree or disagree that mail services in the UK provide good value for money

Base: All Respondents

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	789	639	83	22	16	29	150	505	284	720	69	535	139	46	69
Weighted total	809	784	14	4	3	4	25	561	248	776	33	589	132	40	48
Disagree very strongly	29	29	*	-	*	*	1	20	9	29	*	16	4	3	7
	4%	4%	3%	-%	4%	3%	3%	4%	4%	4%	*%	3%	3%	7%	15%
Disagree	76	74	*	1	*	*	2	60	16	72	4	55	11	4	7
	9%	9%	3%	14%	14%	7%	7%	11%	6%	9%	11%	9%	8%	9%	14%
Neither Agree nor disagree	257	247	7	2	1	1	10	179	79	249	9	186	41	11	19
	32%	31%	46%	40%	34%	30%	41%	32%	32%	32%	26%	32%	31%	28%	39%
Agree	310	300	6	1	1	2	9	207	102	290	19	221	56	18	14
	38%	38%	39%	35%	30%	39%	37%	37%	41%	37%	58%	38%	43%	46%	28%
Agree very strongly	130	128	1	*	*	1	3	92	39	129	2	106	18	4	2
	16%	16%	8%	8%	18%	17%	11%	16%	16%	17%	5%	18%	14%	9%	4%
Don't Know (DO NOT READ OUT)	7	6	*	*	-	*	*	3	3	6	*	5	1	*	-
	1%	1%	1%	4%	-%	4%	2%	1%	1%	1%	1%	1%	1%	*%	-%
NET: Agree	440	428	7	2	1	3	12	299	141	419	21	328	75	22	16
	54%	55%	47%	43%	48%	56%	48%	53%	57%	54%	62%	56%	57%	56%	33%
NET: Disagree	105	103	1	1	*	*	2	80	25	102	4	70	15	6	14
	13%	13%	6%	14%	18%	10%	9%	14%	10%	13%	11%	12%	11%	16%	28%
															ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 83 (continuation)

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QAP1. On a scale of 1 to 5 where 5 is agree very strongly and 1 is disagree very strongly, please tell me how strongly you agree or disagree that mail services in the UK provide good value for money

Base: All Respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	789	383	119	99	107	52	27	2	689	34	26	23	17	107	57	67	97
Weighted total	809	437	121	108	100	35	8	*	730	29	20	21	9	105	65	64	106
Disagree very strongly	29	13	2	5	7	3	-	*	22	2	2	2	1	3	*	*	2
	4%	3%	1%	5%	7%	8%	-%	50%	3%	8%	10%	10%	9%	2%	%	1%	2%
					b	ab											
Disagree	76	39	13	12	8	2	1	-	65	2	4	3	1	10	8	8	9
	9%	9%	11%	11%	8%	6%	11%	-%	9%	8%	21%	13%	15%	9%	13%	13%	9%
Neither Agree nor disagree	257	130	49	23	41	9	5	*	233	8	6	8	2	27	26	16	37
	32%	30%	40%	22%	41%	26%	66%	50%	32%	28%	30%	38%	26%	26%	39%	25%	34%
			ac		ac												
Agree	310	171	44	48	29	16	1	-	285	8	6	6	4	45	25	30	41
	38%	39%	36%	44%	29%	47%	19%	-%	39%	29%	31%	29%	47%	43%	39%	47%	38%
				d	d	d											
Agree very strongly	130	80	13	17	15	4	*	-	120	8	*	2	*	19	6	9	16
	16%	18%	11%	16%	15%	12%	5%	-%	16%	27%	1%	10%	4%	18%	9%	14%	15%
Don't Know (DO NOT READ OUT)	7	4	-	3	*	-	-	-	5	*	1	-	-	2	-	-	2
	1%	1%	-%	3%	%	-%	-%	-%	1%	%	6%	-%	-%	2%	-%	-%	2%
NET: Agree	440	251	57	65	44	21	2	-	405	16	7	8	4	64	31	39	56
	54%	58%	47%	60%	44%	59%	24%	-%	55%	56%	32%	38%	50%	61%	48%	61%	53%
		bd		d													
NET: Disagree	105	52	15	17	15	5	1	*	87	5	6	5	2	12	8	9	12
	13%	12%	13%	16%	15%	15%	11%	50%	12%	16%	31%	24%	24%	12%	13%	14%	11%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

QAP1. On a scale of 1 to 5 where 5 is agree very strongly and 1 is disagree very strongly, please tell me how strongly you agree or disagree that mail services in the UK provide good value for money
Base: All Respondents

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	390	136	257	710	427	724	345	169	595	322	714	131	561	488
Weighted total	809	411	252	722	417	744	351	129	612	323	727	110	573	487
Disagree very strongly	29	10	10	26	16	28	16	9	24	14	28	4	17	20
	4%	2%	7%	4%	4%	4%	5%	7%	4%	4%	4%	4%	3%	4%
		a						a						
Disagree	76	39	11	63	42	65	33	7	51	24	61	7	46	40
	9%	9%	8%	9%	10%	9%	9%	6%	8%	7%	8%	7%	8%	8%
Neither Agree nor disagree	257	128	47	234	148	245	116	46	209	118	240	40	187	179
	32%	31%	33%	32%	35%	33%	33%	36%	34%	36%	33%	37%	33%	37%
Agree	310	154	58	277	156	280	137	46	231	121	280	44	228	188
	38%	37%	41%	38%	37%	38%	39%	36%	38%	37%	38%	40%	40%	39%
Agree very strongly	130	76	15	116	54	120	45	19	91	45	114	14	92	58
	16%	19%	11%	16%	13%	16%	13%	15%	15%	14%	16%	13%	16%	12%
		b												
Don't Know (DO NOT READ OUT)	7	5	*	6	1	6	3	*	5	3	5	*	3	1
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
NET: Agree	440	230	73	393	210	399	183	66	323	166	393	58	320	247
	54%	56%	52%	54%	50%	54%	52%	51%	53%	51%	54%	53%	56%	51%
NET: Disagree	105	48	21	89	58	93	49	17	75	37	89	12	63	60
	13%	12%	15%	12%	14%	12%	14%	13%	12%	12%	12%	11%	11%	12%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 83 (continuation)

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QAP1. On a scale of 1 to 5 where 5 is agree very strongly and 1 is disagree very strongly, please tell me how strongly you agree or disagree that mail services in the UK provide good value for money

Base: All Respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	789	109	14	646	776	663	779	596	783	-	433	776	181	78	118	591
Weighted total	809	110	14	664	792	673	796	607	803	-	443	797	174	68	124	613
Disagree very strongly	29	6	-	18	29	24	29	23	29	-	15	29	7	1	14	15
	4%	5%	-%	3%	4%	4%	4%	4%	4%	-%	3%	4%	4%	1%	11%	2%
														ac		
Disagree	76	13	3	56	74	65	76	66	76	-	49	76	19	7	18	50
	9%	12%	19%	8%	9%	10%	10%	11%	9%	-%	11%	10%	11%	11%	14%	8%
														c		
Neither Agree nor disagree	257	42	4	206	257	211	257	189	254	-	140	254	51	15	44	198
	32%	38%	31%	31%	32%	31%	32%	31%	32%	-%	32%	32%	30%	22%	36%	32%
														a		
Agree	310	39	3	265	297	259	299	232	308	-	168	306	69	26	36	246
	38%	36%	19%	40%	38%	39%	38%	38%	38%	-%	38%	38%	40%	39%	29%	40%
														b		
Agree very strongly	130	10	4	115	129	108	129	92	130	-	68	126	26	19	12	100
	16%	9%	30%	17%	16%	16%	16%	15%	16%	-%	15%	16%	15%	27%	10%	16%
				a										bc		
Don't Know (DO NOT READ OUT)	7	*	*	4	7	6	7	5	7	-	3	7	2	*	*	6
	1%	*%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%	1%	*%	*%	1%
NET: Agree	440	49	7	380	426	367	428	323	438	-	236	432	95	45	48	345
	54%	44%	49%	57%	54%	55%	54%	53%	55%	-%	53%	54%	55%	66%	39%	56%
				a										b		b
NET: Disagree	105	19	3	74	103	89	105	90	105	-	64	105	25	8	32	64
	13%	17%	19%	11%	13%	13%	13%	15%	13%	-%	14%	13%	15%	12%	25%	10%
														ac		

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 83 (continuation)

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QAP1. On a scale of 1 to 5 where 5 is agree very strongly and 1 is disagree very strongly, please tell me how strongly you agree or disagree that mail services in the UK provide good value for money

Base: All Respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	789	91	38	646	497	292	721	68	531	49	174	590	166	3
Weighted total	809	100	46	651	505	304	743	66	536	56	181	602	172	2
Disagree very strongly	29	5	5	17	20	9	25	4	8	6	8	15	3	-
	4%	5%	11% c	3%	4%	3%	3%	7%	1%	11% a	5%	3%	2%	-%
Disagree	76	13	7	56	49	27	69	7	20	17	36	35	17	1
	9%	13%	15%	9%	10%	9%	9%	10%	4%	31% a	20% b	6%	10%	69%
Neither Agree nor disagree	257	28	8	218	172	85	239	18	138	18	72	178	53	*
	32%	28%	18%	34% b	34%	28%	32%	28%	26%	32%	40% b	30%	31%	6%
Agree	310	40	19	245	183	126	291	18	251	12	48	259	67	*
	38%	40%	41%	38%	36%	42%	39%	28%	47% b	22%	26%	43% a	39%	25%
Agree very strongly	130	12	7	112	78	52	114	16	116	2	17	111	28	-
	16%	12%	15%	17%	15%	17%	15%	25% a	22% b	4%	9%	18% a	16%	-%
Don't Know (DO NOT READ OUT)	7	3	-	4	3	4	5	1	4	-	-	4	5	-
	1%	3% c	-%	1%	1%	1%	1%	2%	1%	-%	-%	1%	3%	-%
NET: Agree	440	51	26	356	262	178	406	35	366	14	64	369	94	*
	54%	51%	56%	55%	52%	59%	55%	53%	68% b	26%	36%	61% a	55%	25%
NET: Disagree	105	18	12	73	69	37	94	11	28	23	45	51	20	1
	13%	18%	26% c	11%	14%	12%	13%	17%	5%	42% a	25% b	8%	12%	69%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

QAP1. On a scale of 1 to 5 where 5 is agree very strongly and 1 is disagree very strongly, please tell me how strongly you agree or disagree that mail services in the UK provide good value for money
Base: All Respondents

	TOTAL	Quarter	
		Q1 2013	Q2 2013
Significance Level: 95%		a	b
Unweighted total	789	403	386
Weighted total	809	410	399
Disagree very strongly	29	11	19
	4%	3%	5%
Disagree	76	44	32
	9%	11%	8%
Neither Agree nor disagree	257	141	116
	32%	34%	29%
Agree	310	149	161
	38%	36%	40%
Agree very strongly	130	62	68
	16%	15%	17%
Don't Know (DO NOT READ OUT)	7	3	3
	1%	1%	1%
NET: Agree	440	211	229
	54%	51%	57%
NET: Disagree	105	55	50
	13%	13%	13%

Columns Tested: a,b

QS1. In the next 12 months, do you anticipate the volume of mail your organisation sends to increase, decrease or stay about the same?

Base: All Respondents

Significance Level: 95%
Unweighted total
Weighted total

Increase

Stay about the same

Decrease

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
146	7	24	9	11	8	28	15	11	9	8	10	4	124
9%	8%	14%	8%	10%	7%	10%	8%	5%	11%	10%	14%	6%	9%
		hl									hlm		
1215	70	127	86	89	86	198	152	174	64	62	56	51	1046
76%	73%	72%	77%	76%	74%	71%	80%	83%	72%	71%	76%	81%	76%
							j	bfj				fj	
240	18	25	15	16	20	52	22	24	15	17	7	9	207
15%	19%	14%	13%	14%	18%	19%	12%	11%	17%	19%	10%	14%	15%
	k				k	k				k			
4	-	-	2	-	1	-	-	-	-	-	*	-	3
*%	-%	-%	2%	-%	1%	-%	-%	-%	-%	-%	1%	-%	*%
			m										

QS1. In the next 12 months, do you anticipate the volume of mail your organisation sends to increase, decrease or stay about the same?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Increase

9%

Stay about the same

76%

Decrease

15%

Don't Know (DO NOT READ OUT)

4

1%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
146	139	4	1	2	1	7	111	35	138	8	54	38	25	30
9%	9%	10%	8%	24%	12%	11%	10%	7%	9%	13%	5%	13%	24%	31%
				abcd								a	ab	ab
1215	1167	29	7	4	7	47	862	353	1172	43	877	212	69	57
76%	76%	75%	77%	58%	78%	74%	76%	76%	76%	73%	79%	73%	65%	60%
	d	d	d		d	d					bcd	d		
240	230	6	1	1	1	9	165	75	232	8	180	39	11	9
15%	15%	15%	15%	18%	10%	15%	14%	16%	15%	14%	16%	13%	11%	9%
											d			
4	4	-	-	-	-	-	2	1	4	-	2	2	-	-
1%	1%	-%	-%	-%	-%	-%	1%	1%	1%	-%	1%	1%	-%	-%

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QS1. In the next 12 months, do you anticipate the volume of mail your organisation sends to increase, decrease or stay about the same?

Base: All Respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Increase	146	49	27	21	16	21	8	4	90	15	7	15	20	39	29	28	40
	9%	7%	9%	9%	7%	27%	29%	40%	6%	20%	16%	34%	66%	14%	24%	16%	18%
					abcd	abcd			a	a	ac	abcd		a			
Stay about the same	1215	589	208	186	162	49	16	5	1096	52	31	27	8	205	77	136	147
	76%	82%	67%	78%	74%	63%	56%	56%	78%	70%	72%	64%	27%	75%	63%	76%	68%
		bdef		bef	ef				de	e	e	e		b			
Decrease	240	79	76	32	40	8	4	*	225	7	4	1	2	29	15	15	29
	15%	11%	24%	13%	18%	11%	14%	4%	16%	10%	10%	2%	6%	11%	12%	8%	13%
			ace	a					d								
Don't Know (DO NOT READ OUT)	4	2	1	*	-	-	-	-	2	-	1	-	-	*	1	*	1
	*%	*%	*%	*%	-%	-%	-%	-%	*%	-%	3%	-%	-%	*%	1%	*%	1%
										a							

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 84 (continuation)

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QS1. In the next 12 months, do you anticipate the volume of mail your organisation sends to increase, decrease or stay about the same?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Increase

Stay about the same

Decrease

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
146	50	26	70	129	90	136	96	39	126	97	136	36	108	100
9%	6%	9%	14%	9%	10%	9%	13%	10%	10%	15%	9%	15%	9%	9%
			ab				abcf			b		b		
1215	637	193	372	1120	673	1138	529	289	942	488	1119	164	917	793
76%	78%	68%	75%	76%	74%	76%	72%	76%	74%	73%	76%	70%	77%	74%
	b													
240	121	63	55	227	140	227	103	50	198	83	223	32	166	182
15%	15%	22%	11%	15%	15%	15%	14%	13%	16%	12%	15%	14%	14%	17%
	c	ac												a
4	3	*	-	2	*	2	2	2	2	*	2	2	2	*
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%

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Table 84 (continuation)

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QS1. In the next 12 months, do you anticipate the volume of mail your organisation sends to increase, decrease or stay about the same?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Increase

Stay about the same

Decrease

Don't Know (DO NOT READ
OUT)

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
1604	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
	26	8	114	144	132	146	116	146	-	92	144	49	146	-	-
9%	10%	23%	9%	9%	10%	9%	10%	9%	-%	10%	9%	14%	100%	-%	-%
		ac										b	bc		
	180	23	993	1179	1017	1184	909	1207	-	660	1188	253	-	-	1215
76%	69%	65%	77%	76%	76%	76%	76%	76%	-%	74%	76%	71%	-%	-%	100%
		a									c				ab
	55	4	178	234	194	234	176	236	2	144	233	53	-	240	-
15%	21%	12%	14%	15%	14%	15%	15%	15%	100%	16%	15%	15%	-%	100%	-%
	c													ac	
	*	-	2	4	2	4	*	4	-	*	4	2	-	-	-
4	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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Table 84 (continuation)

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Q51. In the next 12 months, do you anticipate the volume of mail your organisation sends to increase, decrease or stay about the same?

Base: All Respondents

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%	a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	1038	123	395	1175	376	8
Increase	146	36	22	88	99	46	144	98	10	54	90	61	1
	9%	17%	21%	7%	9%	9%	10%	9%	8%	14%	8%	16%	10%
		c	c				b			b			
Stay about the same	1215	149	68	989	790	425	1120	808	75	258	930	274	4
	76%	72%	65%	77%	72%	83%	75%	78%	61%	65%	79%	73%	52%
				b		a		b		a			
Decrease	240	20	14	203	202	38	231	131	36	83	152	41	2
	15%	10%	14%	16%	18%	7%	15%	13%	29%	21%	13%	11%	22%
			a	a	b		b		a	b			
Don't Know (DO NOT READ OUT)	4	1	-	*	4	-	2	*	2	-	2	-	1
	*%	1%	-%	*%	*%	-%	*%	*%	1%	-%	*%	-%	16%
		c					a		a				

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

QS1. In the next 12 months, do you anticipate the volume of mail your organisation sends to increase, decrease or stay about the same?

Base: All Respondents

Significance Level: 95%
Unweighted total
Weighted total
Increase
9%
c
Stay about the same
76%
Decrease
240
15%
Don't Know (DO NOT READ
OUT)
4
*%
Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
146	36	42	22	46
9%	9%	10%	5%	11%
	c	c		c
1215	302	299	319	294
76%	77%	74%	78%	74%
240	54	61	67	57
15%	14%	15%	16%	14%
4	*	-	1	2
*%	*%	-%	*%	*%

QS2a. What would you say are the reasons for the expected increase?

Base: All respondents who anticipate volume of mail to increase

Significance Level: 95%

Unweighted total

Weighted total

Growth of business

Increase use of direct

mail for marketing

Ability to reach more

customers

Innovative services

Increase in fulfilment

(fulfilling customer

orders by mailing out

items)

More items being sent to

existing clients

Cheaper / Lower Prices

Better quality

Because of the recession

Other (PLEASE SPECIFY)

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m
158	4	14	8	13	9	24	10	6	9	22	27	12	97
146	7	24	9	11	8	28	15	11	9	8	10	4	124
100	7	13	4	8	4	19	11	11	4	7	8	3	82
68%	100%	55%	43%	74%	53%	67%	75%	100%	41%	81%	78%	80%	66%
10	-	2	2	*	1	2	-	-	-	1	1	1	8
7%	-%	9%	19%	2%	18%	7%	-%	-%	-%	13%	9%	17%	6%
5	-	-	-	-	-	4	-	-	-	-	1	-	4
3%	-%	-%	-%	-%	-%	13%	-%	-%	-%	-%	9%	-%	3%
4	-	-	-	-	-	4	-	-	-	-	-	-	4
2%	-%	-%	-%	-%	-%	13%	-%	-%	-%	-%	-%	-%	3%
3	-	-	-	-	1	-	*	-	-	1	*	-	1
2%	-%	-%	-%	-%	16%	-%	1%	-%	-%	12%	5%	-%	1%
2	-	*	-	-	-	-	-	-	1	-	*	*	2
2%	-%	1%	-%	-%	-%	-%	-%	-%	14%	-%	1%	14%	1%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
39	-	8	4	3	3	11	4	-	6	*	1	1	38
27%	-%	35%	38%	26%	31%	39%	25%	-%	59%	1%	7%	20%	30%

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Table 85 (continuation)

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QS2a. What would you say are the reasons for the expected increase?

Base: All respondents who anticipate volume of mail to increase

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	f	a	b	a	*b	a	b	*c	d
Unweighted total	158	111	25	5	10	7	47	111	47	141	17	52	41	24	41
Weighted total	146	139	4	1	2	1	7	111	35	138	8	54	38	25	30
Growth of business	100	95	3	1	1	1	5	72	28	93	7	29	26	20	26
	68%	68%	92%	82%	36%	52%	72%	65%	81% a	68%	82%	54%	68%	79%	86% a
Increase use of direct mail for marketing	10	9	*	*	*	-	1	8	2	10	*	5	4	*	1
	7%	7%	5%	18%	24%	-%	10%	7%	6%	7%	1%	8%	12%	2%	3%
Ability to reach more customers	5	5	-	-	-	-	-	3	2	3	2	*	*	2	2
	3%	3%	-%	-%	-%	-%	-%	2%	5%	2%	22%	1%	1%	7%	6%
Innovative services	4	4	-	-	-	-	-	4	-	4	-	-	2	-	2
	2%	3%	-%	-%	-%	-%	-%	3%	-%	3%	-%	-%	5%	-%	6%
Increase in fulfilment (fulfilling customer orders by mailing out items)	3	3	*	-	-	-	*	2	1	3	-	2	1	-	*
	2%	2%	4%	-%	-%	-%	2%	2%	3%	2%	-%	3%	2%	-%	2%
More items being sent to existing clients	2	2	-	-	*	-	*	2	-	2	*	1	1	-	-
	2%	1%	-%	-%	26%	-%	6%	2%	-%	1%	4%	2%	4%	-%	-%
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (PLEASE SPECIFY)	39	38	*	*	*	*	1	34	6	36	3	18	11	7	4
	27%	27%	8%	39%	21%	48%	20%	30%	16%	26%	34%	34%	28%	26%	13%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 85 (continuation)

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QS2a. What would you say are the reasons for the expected increase?

Base: All respondents who anticipate volume of mail to increase

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%	a	*b	*c	*d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	*a	b
Unweighted total	158	42	27	21	24	25	15	96	15	11	14	22	41	29	27	43
Weighted total	146	49	27	21	16	21	8	90	15	7	15	20	39	29	28	40
Growth of business	100	33	16	14	9	18	7	50	15	5	15	15	28	21	17	31
	68%	66%	62%	67%	59%	85%	88%	56%	97%	79%	100%	78%	72%	71%	62%	78%
Increase use of direct mail for marketing	10	5	-	*	1	4	1	8	*	-	*	2	1	4	1	4
	7%	9%	-%	1%	7%	18%	7%	9%	3%	-%	1%	8%	2%	13%	2%	10%
Ability to reach more customers	5	-	*	2	-	2	-	3	-	-	2	-	2	2	2	2
	3%	-%	2%	11%	-%	9%	-%	3%	-%	-%	12%	-%	6%	6%	6%	6%
Innovative services	4	2	2	-	-	-	-	2	-	-	2	-	-	4	-	4
	2%	4%	7%	-%	-%	-%	-%	2%	-%	-%	12%	-%	-%	12%	-%	9%
Increase in fulfilment (fulfilling customer orders by mailing out items)	3	1	*	-	*	*	-	2	-	*	-	*	1	-	*	*
	2%	3%	2%	-%	1%	2%	6%	3%	-%	2%	-%	2%	2%	-%	1%	1%
More items being sent to existing clients	2	*	1	*	*	-	-	1	1	-	-	-	-	-	-	-
	2%	1%	5%	2%	1%	-%	-%	1%	9%	-%	-%	-%	-%	-%	-%	-%
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (PLEASE SPECIFY)	39	11	10	6	6	4	1	32	-	2	-	6	15	6	13	8
	27%	22%	36%	31%	37%	18%	9%	35%	-%	24%	-%	30%	38%	20%	45%	20%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 85 (continuation)

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QS2a. What would you say are the reasons for the expected increase?
Base: All respondents who anticipate volume of mail to increase

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	52	27	79	145	105	150	106	56	139	103	148	46	119	107
Weighted total	146	50	26	129	90	136	96	39	126	97	136	36	108	100
Growth of business	100	34	14	88	63	93	69	26	86	67	95	27	71	74
	68%	68%	53%	68%	70%	68%	72%	67%	69%	69%	70%	76%	65%	74%
Increase use of direct mail for marketing	10	5	4	10	3	10	3	4	10	4	10	1	9	3
	7%	10%	14%	8%	4%	7%	3%	11%	8%	4%	7%	2%	8%	3%
Ability to reach more customers	5	2	*	5	2	5	4	2	5	4	5	2	4	5
	3%	5%	2%	4%	3%	3%	4%	5%	4%	4%	3%	6%	4%	5%
Innovative services	4	-	-	2	2	2	4	-	4	4	2	-	2	2
	2%	-%	-%	1%	2%	1%	4%	-%	3%	4%	1%	-%	2%	2%
Increase in fulfillment (fulfilling customer orders by mailing out items)	3	*	*	2	2	3	2	*	1	2	2	*	2	1
	2%	1%	1%	2%	3%	2%	2%	1%	1%	2%	2%	*%	2%	1%
More items being sent to existing clients	2	1	1	2	2	2	2	-	2	2	2	*	2	2
	2%	2%	5%	2%	2%	2%	2%	-%	2%	2%	2%	1%	2%	2%
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (PLEASE SPECIFY)	39	12	10	35	25	36	25	13	34	27	35	9	31	26
	27%	25%	38%	27%	28%	27%	26%	33%	27%	28%	26%	25%	28%	26%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 85 (continuation)

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QS2a. What would you say are the reasons for the expected increase?
Base: All respondents who anticipate volume of mail to increase

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		*a	*b	c	a	b	c	d	e	*f	a	b	c	a	*b	*c
Unweighted total	158	26	7	124	156	144	157	127	158	-	102	155	56	158	-	-
Weighted total	146	26	8	114	144	132	146	116	146	-	92	144	49	146	-	-
Growth of business	100	19	7	75	100	92	100	82	100	-	64	98	40	100	-	-
	68%	75%	79%	66%	69%	69%	68%	70%	68%	-%	70%	68%	80%	68%	-%	-%
Increase use of direct mail for marketing	10	1	*	9	10	7	10	7	10	-	5	10	1	10	-	-
	7%	4%	6%	6%	7%	5%	7%	6%	7%	-%	5%	7%	1%	7%	-%	-%
Ability to reach more customers	5	-	2	3	5	5	5	3	5	-	2	4	4	5	-	-
	3%	-%	21%	2%	3%	3%	3%	2%	3%	-%	2%	3%	8%	3%	-%	-%
Innovative services	4	-	-	4	4	4	4	2	4	-	2	4	2	4	-	-
	2%	-%	-%	3%	2%	3%	2%	2%	2%	-%	2%	2%	4%	2%	-%	-%
Increase in fulfillment (fulfilling customer orders by mailing out items)	3	1	1	1	3	2	3	1	3	-	1	3	-	3	-	-
	2%	5%	15%	1%	2%	2%	2%	1%	2%	-%	1%	2%	-%	2%	-%	-%
More items being sent to existing clients	2	1	-	1	2	2	2	2	2	-	2	2	*	2	-	-
	2%	5%	-%	1%	2%	2%	2%	2%	2%	-%	2%	2%	1%	2%	-%	-%
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (PLEASE SPECIFY)	39	5	2	32	37	34	39	31	39	-	26	39	13	39	-	-
	27%	19%	21%	26%	26%	26%	27%	27%	27%	-%	28%	27%	27%	27%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 85 (continuation)

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QS2a. What would you say are the reasons for the expected increase?
Base: All respondents who anticipate volume of mail to increase

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	a	b	a	*b	a	*b	a	b	a	*b
Unweighted total	158	43	20	94	106	52	155	3	107	8	55	99	63	3
Weighted total	146	36	22	88	99	46	144	1	98	10	54	90	61	1
Growth of business	100	25	21	53	72	27	99	1	67	6	38	61	42	1
	68%	72%	99%	60%	73%	59%	68%	67%	69%	62%	70%	68%	68%	100%
Increase use of direct mail for marketing	10	3	-	7	7	3	10	-	7	*	5	5	4	-
	7%	8%	-%	8%	7%	7%	7%	-%	7%	2%	9%	6%	7%	-%
Ability to reach more customers	5	*	-	4	5	-	5	-	5	-	-	5	2	-
	3%	1%	-%	5%	5%	-%	3%	-%	5%	-%	-%	5%	4%	-%
Innovative services	4	4	-	-	4	-	4	-	2	-	2	2	4	-
	2%	10%	-%	-%	4%	-%	2%	-%	2%	-%	3%	2%	6%	-%
		c												
Increase in fulfilment (fulfilling customer orders by mailing out items)	3	-	*	2	2	1	3	-	2	-	*	2	*	-
	2%	-%	2%	3%	2%	1%	2%	-%	2%	-%	1%	2%	*%	-%
More items being sent to existing clients	2	-	1	1	*	2	2	-	1	-	-	2	-	-
	2%	-%	6%	1%	*%	4%	2%	-%	1%	-%	-%	2%	-%	-%
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other (PLEASE SPECIFY)	39	9	*	29	24	15	39	*	27	4	14	25	17	-
	27%	27%	1%	33%	24%	33%	27%	33%	27%	38%	26%	27%	28%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 85 (continuation)

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QS2a. What would you say are the reasons for the expected increase?
Base: All respondents who anticipate volume of mail to increase

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	158	42	38	33	45
Weighted total	146	36	42	22	46
Growth of business	100	22	29	17	32
	68%	62%	68%	75%	70%
Increase use of direct mail for marketing	10	*	2	1	7
	7%	*%	6%	4%	15%
					a
Ability to reach more customers	5	2	-	2	-
	3%	6%	-%	10%	-%
			bd		
Innovative services	4	-	-	2	2
	2%	-%	-%	8%	4%
Increase in fulfilment (fulfilling customer orders by mailing out items)	3	2	*	-	-
	2%	7%	1%	-%	-%
More items being sent to existing clients	2	1	1	*	-
	2%	2%	3%	*%	-%
Cheaper / Lower Prices	-	-	-	-	-
	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-
	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-
	-%	-%	-%	-%	-%
Other (PLEASE SPECIFY)	39	13	13	5	9
	27%	36%	30%	23%	19%

Columns Tested: a,b,c,d

QS2b. What is the main reason for the expected increase in volumes of post? Please choose the most important reason.
Base: All with 2 or more reasons for an increase in volume

Significance Level: 95%

Unweighted total

Weighted total

Cheaper / Lower Prices

Better quality

Innovative services

Ability to reach more customers

Growth of business

Increase use of direct mail for marketing

More items being sent to existing clients

Increase in fulfilment (fulfilling customer orders by mailing out items)

Because of the recession

QS2a other

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
17	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m
Unweighted total	-	-	-	1	2	5	1	-	1	2	2	3	10
Weighted total	-	-	-	*	1	9	*	-	1	1	1	1	12
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Innovative services	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Ability to reach more customers	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Growth of business	11	-	-	-	*	7	*	-	1	1	1	1	9
77%	-%	-%	-%	-%	13%	80%	100%	-%	100%	100%	100%	90%	73%
Increase use of direct mail for marketing	1	-	-	-	1	-	-	-	-	-	-	*	1
10%	-%	-%	-%	-%	87%	-%	-%	-%	-%	-%	-%	10%	11%
More items being sent to existing clients	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Increase in fulfilment (fulfilling customer orders by mailing out items)	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS2a other	2	-	-	*	-	2	-	-	-	-	-	-	2
13%	-%	-%	-%	100%	-%	20%	-%	-%	-%	-%	-%	-%	16%

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Table 86 (continuation) Page 701

QS2b. What is the main reason for the expected increase in volumes of post? Please choose the most important reason.

Base: All with 2 or more reasons for an increase in volume

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*a	*b	*a	*b	*a	*b	*c	*d
Unweighted total	17	12	2	2	1	-	5	12	5	16	1	2	7	1	7
Weighted total	15	14	*	*	*	-	1	11	4	13	2	1	7	2	5
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Innovative services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Ability to reach more customers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Growth of business	11	11	*	*	-	-	*	9	2	10	2	1	4	2	4
	77%	78%	100%	37%	-%	-%	60%	82%	63%	74%	100%	100%	58%	100%	94%
Increase use of direct mail for marketing	1	1	-	-	*	-	*	-	1	1	-	-	1	-	*
	10%	9%	-%	-	100%	-%	15%	-%	37%	11%	-%	-	18%	-	2%
More items being sent to existing clients	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Increase in fulfilment (fulfilling customer orders by mailing out items)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS2a other	2	2	-	*	-	-	*	2	-	2	-	-	2	-	*
	13%	13%	-%	63%	-%	-%	26%	18%	-%	15%	-%	-%	25%	-%	4%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 86 (continuation)

Page 702

QS2b. What is the main reason for the expected increase in volumes of post? Please choose the most important reason.

Base: All with 2 or more reasons for an increase in volume

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	17	2	3	2	3	3	1	7	1	2	3	4	10	4	6	8
Weighted total	15	2	4	2	1	5	1	6	1	*	4	4	6	7	3	10
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Innovative services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Ability to reach more customers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Growth of business	11	2	4	2	1	2	*	6	1	*	4	*	4	5	3	7
	77%	100%	100%	100%	100%	37%	62%	100%	100%	43%	100%	13%	64%	81%	89%	68%
Increase use of direct mail for marketing	1	-	-	-	1	*	-	-	-	-	-	1	*	1	*	1
	10%	-%	-%	-%	27%	14%	-%	-%	-%	-%	-%	38%	2%	19%	4%	13%
More items being sent to existing clients	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Increase in fulfilment (fulfilling customer orders by mailing out items)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS2a other	2	-	-	-	2	*	-	-	-	*	-	2	2	-	*	2
	13%	-%	-%	-%	37%	24%	-%	-%	-%	57%	-%	49%	34%	-%	7%	19%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 86 (continuation)

Page 703

QS2b. What is the main reason for the expected increase in volumes of post? Please choose the most important reason.

Base: All with 2 or more reasons for an increase in volume

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		*a	*b	*c	*a	*b	*c	*d	*e	*f	*a	*b	*c	*a	*b
Unweighted total	17	4	4	9	15	11	16	13	7	16	13	15	8	11	14
Weighted total	15	5	3	7	12	9	13	11	5	14	11	12	4	10	12
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Innovative services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Ability to reach more customers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Growth of business	11	3	2	7	9	7	10	10	3	11	10	9	3	8	9
	77%	61%	60%	96%	73%	76%	74%	97%	55%	76%	97%	73%	92%	85%	72%
Increase use of direct mail for marketing	1	-	1	*	1	*	1	*	*	1	*	1	*	1	1
	10%	-%	40%	2%	11%	1%	11%	1%	2%	10%	1%	11%	3%	13%	12%
More items being sent to existing clients	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Increase in fulfilment (fulfilling customer orders by mailing out items)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS2a other	2	2	-	*	2	2	2	*	2	2	*	2	*	*	2
	13%	39%	-%	3%	16%	23%	15%	2%	43%	14%	2%	16%	5%	2%	17%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 86 (continuation)

Page 704

QS2b. What is the main reason for the expected increase in volumes of post? Please choose the most important reason.

Base: All with 2 or more reasons for an increase in volume

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		*a	*b	*c	*a	*b	*c	*d	*e	*f	*a	*b	*c	*a	*b	*c
Unweighted total	17	4	1	12	16	13	16	12	17	-	9	16	10	17	-	-
Weighted total	15	2	2	11	15	11	15	10	15	-	7	15	9	15	-	-
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Innovative services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Ability to reach more customers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Growth of business	11	2	2	8	11	11	11	7	11	-	6	11	7	11	-	-
	77%	91%	100%	70%	77%	97%	77%	66%	77%	-%	78%	77%	77%	77%	-%	-%
Increase use of direct mail for marketing	1	-	-	1	1	*	1	1	1	-	1	1	*	1	-	-
	10%	-%	-%	13%	10%	1%	10%	14%	10%	-%	19%	10%	1%	10%	-%	-%
More items being sent to existing clients	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Increase in fulfilment (fulfilling customer orders by mailing out items)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS2a other	2	*	-	2	2	*	2	2	2	-	*	2	2	2	-	-
	13%	9%	-%	17%	14%	2%	14%	20%	13%	-%	3%	14%	22%	13%	-%	-%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 86 (continuation)

Page 705

QS2b. What is the main reason for the expected increase in volumes of post? Please choose the most important reason.
Base: All with 2 or more reasons for an increase in volume

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	*c	*a	*b	*a	*b	*a	*b	*a	*b	*a	*b
Unweighted total	17	7	2	8	13	4	17	-	11	1	7	10	10	-
Weighted total	15	6	2	7	13	2	15	-	11	*	5	10	8	-
Cheaper / Lower Prices	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Better quality	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Innovative services	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Ability to reach more customers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Growth of business	11	4	2	5	9	2	11	-	8	-	3	8	6	-
	77%	70%	100%	78%	73%	100%	77%	-%	73%	-%	58%	87%	80%	-%
Increase use of direct mail for marketing	1	*	-	1	1	-	1	-	1	-	*	1	1	-
	10%	2%	-%	19%	11%	-%	10%	-%	11%	-%	2%	13%	18%	-%
More items being sent to existing clients	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Increase in fulfilment (fulfilling customer orders by mailing out items)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Because of the recession	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS2a other	2	2	-	*	2	-	2	-	2	*	2	-	*	-
	13%	29%	-%	3%	16%	-%	13%	-%	16%	100%	40%	-%	2%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 86 (continuation)

Page 706

QS2b. What is the main reason for the expected increase in volumes of post? Please choose the most important reason.
Base: All with 2 or more reasons for an increase in volume

Significance Level: 95%

Unweighted total

Weighted total

Cheaper / Lower Prices

Better quality

Innovative services

 Ability to reach more
customers

Growth of business

 Increase use of direct
mail for marketing

 More items being sent to
existing clients

 Increase in fulfilment
(fulfilling customer
orders by mailing out
items)

Because of the recession

QS2a other

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	*a	*b	*c	*d
17	5	4	5	3
15	3	3	5	4
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
11	3	1	5	2
77%	100%	43%	98%	64%
-	-	-	*	1
10%	-%	-%	2%	36%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
2	-	2	-	-
13%	-%	57%	-%	-%

Produced by OLR

OFC1885

Issue date: 03/07/13

QS3a. What would you say are the reasons for the expected decrease?

Base: All who anticipate volume of mail to decrease

Significance Level: 95%

Unweighted total

Weighted total

Increase use of emailing services

Postal costs

Use of new/digital communication methods

Downsizing the company

Increase use of social media

Electronic technology is more reliable / faster

Less effective than other communications media

Poor customer service /unreliable service

Because of the recession

Environmental costs

Relocation of staff / company

Too complicated - hard to understand what the best mailing option is

More BACS payments

Other

Don't Know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
242	*a	*b	*c	*d	*e	f	*g	*h	*i	j	*k	*l	m
12	12	15	10	15	20	39	17	12	16	39	22	25	156
240	18	25	15	16	20	52	22	24	15	17	7	9	207
119	9	13	9	12	6	30	9	11	4	10	2	3	104
50%	51%	54%	62%	74%	28%	58%	41%	46%	29%	60%	24%	35%	50%
62	7	3	-	7	8	14	2	6	7	5	*	3	53
26%	39%	13%	-%	41%	39%	26%	8%	27%	44%	29%	6%	40%	26%
59	4	4	4	3	4	7	8	8	7	5	4	1	49
25%	20%	17%	25%	17%	20%	14%	34%	36%	46%	30%	53%	12%	24%
14	2	-	2	1	3	4	-	2	-	1	-	-	13
6%	10%	-	12%	8%	13%	7%	-%	9%	-	6%	-%	-%	6%
12	-	-	-	*	-	2	2	6	1	*	-	*	11
5%	-%	-%	-%	1%	-%	3%	8%	27%	9%	3%	-%	3%	6%
12	2	-	-	-	3	2	-	2	2	1	-	*	10
5%	10%	-%	-%	-%	13%	4%	-%	9%	11%	6%	-%	6%	5%
9	-	2	-	-	-	2	2	2	1	-	-	-	9
4%	-%	9%	-%	-%	-%	3%	9%	9%	9%	-%	-%	-%	4%
8	-	-	2	-	-	4	2	-	-	1	*	-	7
3%	-%	-%	13%	-%	-%	7%	8%	-%	-%	6%	2%	-%	4%
6	-	2	-	-	-	2	-	-	-	-	*	1	4
2%	-%	9%	-%	-%	-%	3%	-%	-%	-%	-%	7%	17%	2%
4	-	-	-	-	-	*	-	-	4	-	-	-	4
2%	-%	-%	-%	-%	-%	1%	-%	-%	26%	-%	-%	-%	2%
*	-	-	-	*	-	-	-	-	-	*	-	-	*
*%	-%	-%	-%	1%	-%	-%	-%	-%	-%	1%	-%	-%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1	-	-	-	-	-	*	-	-	-	-	*	-	*
*%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	7%	-%	*%
20	2	4	-	-	1	6	4	-	1	1	1	-	18
8%	10%	17%	-%	-%	6%	11%	16%	-%	9%	6%	13%	-%	9%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

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Table 87 (continuation)

Page 708

QS3a. What would you say are the reasons for the expected decrease?
Base: All who anticipate volume of mail to decrease

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	*b	a	b	*c	*d
Unweighted total	242	181	37	10	8	6	61	163	79	227	15	154	49	19	20
Weighted total	240	230	6	1	1	1	9	165	75	232	8	180	39	11	9
Increase use of emailing services	119	114	3	*	1	*	5	82	37	114	5	90	22	4	3
	50%	50%	59%	30%	40%	13%	48%	50%	49%	49%	57%	50%	56%	31%	37%
Postal costs	62	58	2	1	1	-	4	34	28	62	*	45	9	4	4
	26%	25%	31%	75%	57%	-%	38%	21%	37% a	27%	5%	25%	23%	33%	47%
Use of new/digital communication methods	59	56	2	*	*	*	3	40	19	57	2	47	8	3	1
	25%	24%	29%	25%	26%	17%	27%	24%	26%	25%	24%	26%	21%	24%	11%
Downsizing the company	14	14	-	-	-	-	-	9	5	14	-	14	*	-	-
	6%	6% f	-%	-%	-%	-%	-%	5%	7%	6%	-%	8%	1%	-%	-%
Increase use of social media	12	12	*	-	-	*	*	10	2	9	3	10	2	-	-
	5%	5%	5%	-%	-%	13%	4%	6%	3%	4%	35%	5%	6%	-	-%
Electronic technology is more reliable / faster	12	11	*	-	*	-	1	6	6	12	-	7	3	2	*
	5%	5%	6%	-%	15%	-%	6%	4%	8%	5%	-%	4%	7%	16%	2%
Less effective than other communications media	9	9	*	-	-	-	*	7	2	9	*	5	2	-	2
	4%	4%	2%	-%	-%	-%	2%	4%	3%	4%	2%	3%	6%	-%	21%
Poor customer service /unreliable service	8	8	-	*	-	*	*	4	4	8	*	6	*	2	*
	3%	4%	-%	8%	-%	17%	3%	3%	6%	4%	3%	3%	1%	17%	2%
Because of the recession	6	6	-	-	-	-	-	6	-	6	-	5	*	-	*
	2%	3%	-%	-%	-%	-%	-%	4%	-%	3%	-%	3%	1%	-%	6%
Environmental costs	4	4	-	*	-	*	*	4	*	4	*	4	-	-	-
	2%	2%	-%	10%	-%	17%	3%	2%	*%	2%	2%	2%	-%	-%	-%
Relocation of staff / company	*	-	*	-	-	*	*	*	-	*	*	-	-	*	*
	*%	-%	2%	-%	-%	23%	3% a	*%	-%	*%	1%	-%	-%	1%	2%
Too complicated - hard to understand what the best mailing option is	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
More BACS payments	1	*	*	-	-	-	*	1	-	1	-	1	-	-	-
	*%	*%	2%	-	-%	-%	2%	*%	-%	*%	-%	*%	-%	-%	-%
Other	20	20	-	*	-	-	*	13	6	20	-	18	2	-	-
	8%	8%	-	10%	-%	-%	2%	8%	8%	8%	-%	10%	5%	-%	-%
Don't Know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 87 (continuation)

Page 709

QS3a. What would you say are the reasons for the expected decrease?

Base: All who anticipate volume of mail to decrease

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	*c	d	*e	*f	*g	a	*b	*c	*d	*e	a	*b	*a	*b
Unweighted total	242	67	72	29	42	17	12	3	216	13	5	4	4	32	14	21	26
Weighted total	240	79	76	32	40	8	4	*	225	7	4	1	2	29	15	15	29
Increase use of emailing services	119 50%	29 36%	40 52%	16 52%	26 64% a	7 84%	1 28%	* 30%	109 48%	3 46%	4 84%	1 88%	2 93%	10 34%	11 70%	6 38%	15 50%
Postal costs	62 26%	18 22%	22 28%	11 34%	8 19%	2 25%	2 60%	- -%	58 26%	1 11%	2 54%	* 16%	1 68%	5 19%	2 13%	2 16%	5 17%
Use of new/digital communication methods	59 25%	22 28%	16 22%	14 43%	5 12%	1 9%	1 18%	* 30%	57 25%	1 16%	* 4%	* 12%	- -%	10 34%	3 18%	4 29%	8 28%
Downsizing the company	14 6%	6 8%	4 5%	2 6%	3 6%	- -%	- -%	- -%	14 6%	* 6%	- -%	- -%	- -%	2 6%	- -%	2 12%	- -%
Increase use of social media	12 5%	6 7%	5 6%	1 4%	- -%	* 2%	- -%	- -%	12 5%	* 1%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Electronic technology is more reliable / faster	12 5%	3 4%	1 2%	3 9%	2 6%	* 2%	2 48%	- -%	11 5%	* 3%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Less effective than other communications media	9 4%	4 5%	3 4%	- -%	2 4%	* 2%	- -%	- -%	9 4%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Poor customer service /unreliable service	8 3%	5 7%	2 3%	- -%	* 1%	* 1%	- -%	* 39%	8 4%	- -%	- -%	- -%	* 7%	4 12%	- -%	2 12%	2 6%
Because of the recession	6 2%	4 6%	1 1%	- -%	- -%	* 6%	- -%	- -%	6 3%	- -%	- -%	- -%	- -%	* 2%	- -%	- -%	* 2%
Environmental costs	4 2%	- -%	2 2%	1 4%	- -%	1 16%	- -%	- -%	3 1%	- -%	1 31%	- -%	- -%	1 5%	1 9%	1 10%	1 5%
Relocation of staff / company	* *%	- -%	- -%	- -%	- -%	* 2%	* 3%	- -%	* *%	* 1%	- -%	- -%	- -%	* *%	- -%	* 1%	- -%
Too complicated - hard to understand what the best mailing option is	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
More BACS payments	1 *%	* 1%	* *%	- -%	- -%	- -%	- -%	- -%	1 *%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Other	20 8%	9 11%	7 9%	2 6%	2 5%	- -%	- -%	- -%	18 8%	2 29%	- -%	- -%	- -%	4 14%	2 12%	2 12%	4 14%
Don't Know	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 87 (continuation)

Page 710

QS3a. What would you say are the reasons for the expected decrease?

Base: All who anticipate volume of mail to decrease

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%		a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	242	120	58	63	229	154	230	111	68	199	92	228	41	168	192
Weighted total	240	121	63	55	227	140	227	103	50	198	83	223	32	166	182
Increase use of emailing services	119 50%	65 54%	25 39%	28 52%	112 49%	73 52%	112 49%	53 51%	27 55%	103 52%	45 53%	111 50%	16 50%	82 50%	92 51%
Postal costs	62 26%	36 30%	15 24%	10 19%	61 27%	35 25%	61 27%	24 23%	18 35%	48 24%	23 28%	60 27%	8 24%	44 27%	53 29%
Use of new/digital communication methods	59 25%	28 23%	19 30%	12 22%	56 25%	34 24%	56 25%	30 29%	7 14%	48 24%	30 36%	54 24%	10 32%	43 26%	34 19%
Downsizing the company	14 6%	7 5%	4 6%	4 7%	14 6%	5 3%	14 6%	2 2%	4 7%	11 6%	- -%	14 6%	- -%	8 5%	12 7%
Increase use of social media	12 5%	7 6%	2 4%	3 5%	10 5%	3 2%	10 5%	2 2%	3 6%	10 5%	4 4%	10 5%	* *%	4 2%	9 5%
Electronic technology is more reliable / faster	12 5%	10 8%	1 2%	* *%	12 5%	7 5%	12 5%	5 5%	4 8%	12 6%	3 4%	12 5%	* 2%	7 4%	8 4%
Less effective than other communications media	9 4%	2 2%	7 11%	- -%	9 4%	6 4%	9 4%	7 7%	* *%	7 4%	5 6%	9 4%	2 6%	9 6%	7 4%
Poor customer service /unreliable service	8 3%	6 5%	2 3%	* *%	8 4%	5 3%	8 4%	3 2%	3 6%	7 3%	4 5%	8 4%	* 2%	8 5%	8 5%
Because of the recession	6 2%	3 2%	2 4%	1 2%	4 2%	3 2%	4 2%	4 4%	- -%	4 2%	2 2%	4 2%	2 7%	4 2%	3 2%
Environmental costs	4 2%	1 1%	1 2%	1 3%	4 2%	3 2%	4 2%	3 3%	1 3%	3 1%	1 2%	4 2%	- -%	4 3%	3 2%
Relocation of staff / company	* *%	- -%	* *%	* *%	* *%	* *%	* *%	* *%	* 1%	* *%	* *%	* *%	- -%	* *%	* *%
Too complicated - hard to understand what the best mailing option is	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
More BACS payments	1 *%	1 1%	- -%	- -%	1 *%	* *%	1 *%	- -%	* *%	* *%	- -%	1 *%	- -%	1 *%	* *%
Other	20 8%	10 8%	6 9%	4 7%	17 8%	12 8%	17 8%	6 6%	4 8%	17 9%	4 5%	17 8%	2 7%	13 8%	17 10%
Don't Know	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 87 (continuation)

Page 711

QS3a. What would you say are the reasons for the expected decrease?

Base: All who anticipate volume of mail to decrease

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	*a	b	*c
Unweighted total	242	66	5	170	238	207	238	189	240	1	150	238	67	-	242	-
Weighted total	240	55	4	178	234	194	234	176	236	2	144	233	53	-	240	-
Increase use of emailing services	119 50%	28 52%	1 35%	90 51%	118 51%	105 54%	118 51%	95 54%	117 49%	- -%	77 54%	117 50%	29 55%	- -%	119 50%	- -%
Postal costs	62 26%	19 35%	3 63%	38 21%	59 25%	47 24%	59 25%	45 26%	62 26%	- -%	38 26%	59 25%	20 38%	- -%	62 26%	- -%
		c											b			
Use of new/digital communication methods	59 25%	11 20%	2 51%	46 26%	55 23%	49 25%	55 23%	47 27%	57 24%	- -%	41 28%	54 23%	15 28%	- -%	59 25%	- -%
Downsizing the company	14 6%	1 2%	- -%	13 7%	14 6%	9 5%	14 6%	8 5%	14 6%	- -%	8 6%	14 6%	- -%	- -%	14 6%	- -%
											c					
Increase use of social media	12 5%	- -%	- -%	12 7%	12 5%	10 5%	12 5%	6 3%	12 5%	- -%	2 1%	12 5%	* 1%	- -%	12 5%	- -%
				a								a				
Electronic technology is more reliable / faster	12 5%	4 7%	- -%	7 4%	9 4%	9 5%	9 4%	7 4%	12 5%	- -%	5 3%	9 4%	2 3%	- -%	12 5%	- -%
Less effective than other communications media	9 4%	2 4%	- -%	7 4%	7 3%	5 3%	7 3%	7 4%	9 4%	- -%	3 2%	7 3%	3 6%	- -%	9 4%	- -%
Poor customer service /unreliable service	8 3%	3 5%	- -%	6 3%	8 4%	8 4%	8 4%	8 4%	8 4%	- -%	6 4%	8 4%	* 1%	- -%	8 3%	- -%
Because of the recession	6 2%	* 1%	- -%	3 2%	6 2%	6 3%	6 2%	5 3%	6 2%	- -%	5 3%	6 3%	2 4%	- -%	6 2%	- -%
Environmental costs	4 2%	* *%	- -%	4 2%	4 2%	4 2%	4 2%	3 2%	4 2%	- -%	3 2%	4 2%	1 3%	- -%	4 2%	- -%
Relocation of staff / company	* *%	- -%	* 3%	* *%	* *%	* *%	* *%	* *%	* *%	- -%	* *%	* *%	- -%	- -%	* *%	- -%
Too complicated - hard to understand what the best mailing option is	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
More BACS payments	1 *%	* *%	- -%	* *%	1 *%	1 *%	1 *%	1 *%	1 *%	- -%	* *%	1 *%	- -%	- -%	1 *%	- -%
Other	20 8%	3 6%	- -%	16 9%	18 8%	9 4%	18 8%	7 4%	18 8%	2 100%	6 4%	18 8%	3 5%	- -%	20 8%	- -%
Don't Know	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 87 (continuation)

Page 712

QS3a. What would you say are the reasons for the expected decrease?

Base: All who anticipate volume of mail to decrease

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	c	a	b	a	*b	a	b	a	b	a	*b
Unweighted total	242	23	16	202	207	35	232	10	138	34	80	158	44	1
Weighted total	240	20	14	203	202	38	231	9	131	36	83	152	41	2
Increase use of emailing services	119 50%	5 24%	6 45%	105 52%	98 49%	20 54%	115 50%	4 43%	70 53%	17 47%	40 49%	78 51%	19 47%	- -%
Postal costs	62 26%	7 37%	3 22%	52 25%	58 29%	4 10%	62 27%	* 6%	25 19%	11 30%	27 32%	33 21%	9 21%	- -%
Use of new/digital communication methods	59 25%	3 13%	3 19%	52 25%	47 23%	12 31%	58 25%	* 6%	30 23%	11 30%	24 29%	35 23%	11 26%	- -%
Downsizing the company	14 6%	- -%	2 13%	12 6%	12 6%	2 6%	11 5%	4 41%	11 8%	- -%	1 2%	13 8%	2 4%	- -%
Increase use of social media	12 5%	- -%	- -%	12 6%	9 4%	4 9%	12 5%	- -%	4 3%	4 10%	4 5%	8 5%	- -%	- -%
Electronic technology is more reliable / faster	12 5%	1 6%	* 3%	10 5%	12 6%	- -%	12 5%	- -%	2 1%	5 14%	8 10%	2 1%	- -%	- -%
Less effective than other communications media	9 4%	- -%	* 1%	9 4%	9 5%	- -%	9 4%	- -%	1 1%	4 12%	9 11%	* -%	- -%	- -%
Poor customer service /unreliable service	8 3%	4 16%	* 3%	4 2%	8 4%	- -%	8 4%	- -%	- -%	6 17%	8 10%	- -%	2 4%	2 100%
Because of the recession	6 2%	2 11%	- -%	4 2%	6 3%	- -%	6 3%	- -%	1 1%	- -%	3 3%	1 1%	3 6%	- -%
Environmental costs	4 2%	- -%	- -%	4 2%	4 2%	- -%	4 2%	- -%	4 3%	- -%	- -%	4 3%	3 7%	- -%
Relocation of staff / company	* *%	* 1%	- -%	* *%	* *%	* *%	* *%	- -%	* *%	- -%	- -%	* *%	* *%	- -%
Too complicated - hard to understand what the best mailing option is	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
More BACS payments	1 *%	- -%	- -%	1 *%	1 *%	- -%	1 *%	- -%	* *%	- -%	* *%	* *%	- -%	- -%
Other	20 8%	3 13%	4 28%	13 6%	8 4%	11 30%	19 8%	1 11%	12 9%	1 4%	4 5%	15 10%	4 10%	- -%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

QS3a. What would you say are the reasons for the expected decrease?

Base: All who anticipate volume of mail to decrease

Significance Level: 95%

Unweighted total

Weighted total

Don't Know

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	*a	*b	c	a	b	a	*b	a	b	a	b	a	*b
242	23	16	202	207	35	232	10	138	34	80	158	44	1
240	20	14	203	202	38	231	9	131	36	83	152	41	2
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Ofcom: Business Postal Tracker

Table 87 (continuation)

Page 714

QS3a. What would you say are the reasons for the expected decrease?
Base: All who anticipate volume of mail to decrease

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	242	67	57	62	56
Weighted total	240	54	61	67	57
Increase use of emailing services	119 50%	22 41%	36 59%	36 53%	24 42%
Postal costs	62 26%	21 39%	12 20%	16 23%	13 23%
Use of new/digital communication methods	59 25%	16 29%	13 21%	15 23%	15 27%
Downsizing the company	14 6%	* 1%	7 12%	5 7%	1 2%
Increase use of social media	12 5%	- -%	3 6%	8 12%	1 1%
Electronic technology is more reliable / faster	12 5%	7 14%	2 4%	* 1%	1 3%
Less effective than other communications media	9 4%	2 4%	3 5%	2 3%	2 4%
Poor customer service /unreliable service	8 3%	4 7%	5 8%	- -%	* *%
Because of the recession	6 2%	* 1%	- -%	3 4%	3 5%
Environmental costs	4 2%	1 2%	1 2%	1 2%	* *%
Relocation of staff / company	* *%	* *%	* *%	- -%	- -%
Too complicated - hard to understand what the best mailing option is	- -%	- -%	- -%	- -%	- -%
More BACS payments	1 *%	1 1%	- -%	- -%	- -%
Other	20 8%	4 7%	5 9%	4 5%	7 12%
Don't Know	- -%	- -%	- -%	- -%	- -%

Columns Tested: a,b,c,d

Table 88
QS3b. What is the main reason for the expected decrease in volumes of post? Please choose the most important reason.
Base: All with 2 or more reasons for an decrease in volume

Significance Level: 95%

Unweighted total

Weighted total

Postal costs

Increase use of emailing services

Use of new/digital communication methods

Increase use of social media

Environmental costs

Because of the recession

Too complicated - hard to understand what the best mailing option is

Less effective than other communications media

Downsizing the company

Relocation of staff / company

QS3a other

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
60	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m
Unweighted total	3	3	1	5	1	15	2	5	8	12	4	1	43
Weighted total	5	5	2	5	1	14	4	11	9	5	1	*	56
Postal costs	22	2	2	-	4	1	6	-	2	3	2	*	20
36%	33%	46%	-%	76%	100%	44%	-%	20%	30%	36%	27%	-%	37%
Increase use of emailing services	22	2	2	2	1	-	4	2	4	1	2	1	19
35%	33%	54%	100%	24%	-%	29%	50%	40%	14%	45%	73%	-%	34%
Use of new/digital communication methods	7	-	-	-	-	-	2	2	3	*	-	-	7
11%	-%	-%	-%	-%	-%	-%	50%	20%	28%	2%	-%	-%	12%
Increase use of social media	2	-	-	-	-	2	-	-	-	-	-	-	2
3%	-%	-%	-%	-%	-%	13%	-%	-%	-%	-%	-%	-%	3%
Environmental costs	1	-	-	-	-	-	-	-	1	-	-	-	1
2%	-%	-%	-%	-%	-%	-%	-%	-%	14%	-%	-%	-%	2%
Because of the recession	*	-	-	-	-	-	-	-	-	-	-	*	-
1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%
Too complicated - hard to understand what the best mailing option is	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Less effective than other communications media	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Downsizing the company	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Relocation of staff / company	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS3a other	8	2	-	-	-	2	-	2	1	1	-	-	7
13%	33%	-%	-%	-%	-%	13%	-%	20%	14%	18%	-%	-%	13%

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Table 88 (continuation)

Page 716

QS3b. What is the main reason for the expected decrease in volumes of post? Please choose the most important reason.

Base: All with 2 or more reasons for an decrease in volume

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	*b	*c	*d	*e	*f	a	*b	a	*b	a	*b	*c	*d
Unweighted total	60	45	9	4	2	-	15	37	23	57	3	40	12	3	5
Weighted total	62	60	1	1	*	-	2	40	22	60	2	51	8	1	2
Postal costs	22	21	1	*	*	-	1	12	10	22	*	17	3	*	1
	36%	35%	43%	73%	100%	-%	57%	31%	44%	37%	5%	34%	40%	40%	67%
Increase use of emailing services	22	21	1	*	-	-	1	14	7	19	2	16	5	*	1
	35%	35%	50%	27%	-%	-%	38%	36%	32%	32%	95%	31%	60%	60%	28%
Use of new/digital communication methods	7	7	*	-	-	-	*	4	2	7	-	7	-	-	*
	11%	11%	8%	-%	-%	-%	5%	11%	9%	11%	-%	13%	-%	-%	5%
Increase use of social media	2	2	-	-	-	-	-	2	-	2	-	2	-	-	-
	3%	3%	-%	-%	-%	-%	-%	5%	-%	3%	-%	4%	-%	-%	-%
Environmental costs	1	1	-	-	-	-	-	1	-	1	-	1	-	-	-
	2%	2%	-%	-%	-%	-%	-%	3%	-%	2%	-%	3%	-%	-%	-%
Because of the recession	*	*	-	-	-	-	-	*	-	*	-	*	-	-	-
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	1%	-%	-%	-%
Too complicated - hard to understand what the best mailing option is	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Less effective than other communications media	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Downsizing the company	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Relocation of staff / company	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS3a other	8	8	-	-	-	-	-	5	3	8	-	8	-	-	-
	13%	13%	-%	-%	-%	-%	-%	12%	14%	13%	-%	16%	-%	-%	-%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 88 (continuation)

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QS3b. What is the main reason for the expected decrease in volumes of post? Please choose the most important reason.**Base: All with 2 or more reasons for an decrease in volume**

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	60	15	20	8	7	8	2	-	53	3	2	1	1	2	3	2	4
Weighted total	62	19	23	9	6	4	*	-	57	1	3	*	1	3	3	1	5
Postal costs	22	2	10	6	2	2	*	-	21	*	-	-	1	3	-	1	1
	36%	12%	43%	60%	35%	53%	100%	-%	37%	23%	-%	-%	100%	100%	-%	92%	29%
Increase use of emailing services	22	5	8	4	4	*	-	-	21	1	-	*	-	-	*	-	*
	35%	26%	36%	40%	63%	13%	-%	-%	37%	77%	-%	100%	-%	-%	4%	-%	3%
Use of new/digital communication methods	7	5	1	-	*	-	-	-	7	-	-	-	-	-	-	*	-
	11%	27%	6%	-%	2%	-%	-%	-%	12%	-%	-%	-%	-%	-%	-%	8%	-%
Increase use of social media	2	2	-	-	-	-	-	-	2	-	-	-	-	-	-	-	-
	3%	9%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%
Environmental costs	1	-	-	-	-	1	-	-	-	-	1	-	-	-	1	-	1
	2%	-%	-%	-%	-%	34%	-%	-%	-%	-%	42%	-%	-%	-%	40%	-%	29%
Because of the recession	*	*	-	-	-	-	-	-	*	-	-	-	-	-	-	-	-
	1%	3%	-%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
Too complicated - hard to understand what the best mailing option is	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Less effective than other communications media	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Downsizing the company	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Relocation of staff / company	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS3a other	8	4	4	-	-	-	-	-	6	-	2	-	-	-	2	-	2
	13%	23%	15%	-%	-%	-%	-%	-%	11%	-%	58%	-%	-%	-%	55%	-%	40%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 88 (continuation)

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QS3b. What is the main reason for the expected decrease in volumes of post? Please choose the most important reason.

Base: All with 2 or more reasons for an decrease in volume

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%	a	*b	*c	a	b	c	*d	*e	f	*a	b	*c	a	b
Unweighted total	60	31	16	58	35	58	28	18	50	26	59	6	39	49
Weighted total	62	36	17	60	33	60	27	13	50	25	60	7	45	47
Postal costs	22	13	7	22	15	22	9	5	19	8	22	3	19	19
	36%	38%	39%	37%	44%	37%	35%	43%	37%	34%	37%	38%	42%	40%
Increase use of emailing services	22	12	6	21	10	21	8	5	17	8	22	-	12	18
	35%	35%	36%	35%	29%	35%	29%	43%	33%	33%	36%	-%	27%	38%
Use of new/digital communication methods	7	2	3	5	4	5	2	-	5	2	5	*	5	4
	11%	5%	15%	8%	11%	8%	8%	-%	11%	9%	8%	2%	11%	7%
Increase use of social media	2	2	-	2	-	2	-	-	2	-	2	-	2	-
	3%	5%	-%	3%	-%	3%	-%	-%	4%	-%	3%	-%	4%	-%
Environmental costs	1	-	-	1	1	1	1	1	1	-	1	-	1	1
	2%	-%	-%	2%	4%	2%	5%	10%	3%	-%	2%	-%	3%	3%
Because of the recession	*	-	-	*	-	*	-	-	*	-	*	-	*	-
	1%	-%	-%	1%	-%	1%	-%	-%	1%	-%	1%	-%	1%	-%
Too complicated - hard to understand what the best mailing option is	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Less effective than other communications media	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Downsizing the company	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Relocation of staff / company	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS3a other	8	6	2	8	4	8	6	*	6	6	8	4	6	6
	13%	17%	10%	13%	12%	13%	23%	4%	12%	25%	13%	60%	13%	12%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 88 (continuation)

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QS3b. What is the main reason for the expected decrease in volumes of post? Please choose the most important reason.
Base: All with 2 or more reasons for an decrease in volume

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%															
Unweighted total	60	17	1	40	57	50	57	49	59	-	37	57	17	-	60
Weighted total	62	10	2	49	58	51	58	48	60	-	37	57	16	-	62
Postal costs	22	3	2	16	22	20	22	18	22	-	16	22	10	-	22
	36%	27%	100%	33%	38%	39%	38%	38%	37%	-%	44%	39%	64%	-%	36%
Increase use of emailing services	22	6	-	16	21	17	21	18	20	-	12	20	3	-	22
	35%	55%	-%	33%	36%	32%	36%	37%	33%	-%	31%	35%	21%	-%	35%
Use of new/digital communication methods	7	-	-	7	5	5	5	4	7	-	4	5	*	-	7
	11%	-%	-%	14%	9%	10%	9%	8%	11%	-%	9%	9%	1%	-%	11%
Increase use of social media	2	-	-	2	2	2	2	-	2	-	-	2	-	-	2
	3%	-%	-%	4%	3%	3%	3%	-%	3%	-%	-%	3%	-%	-%	3%
Environmental costs	1	-	-	1	1	1	1	1	1	-	-	1	-	-	1
	2%	-%	-%	3%	2%	3%	2%	3%	2%	-%	-%	2%	-%	-%	2%
Because of the recession	*	-	-	*	*	*	*	*	*	-	-	*	-	-	*
	1%	-%	-%	1%	1%	1%	1%	1%	1%	-%	-%	1%	-%	-%	1%
Too complicated - hard to understand what the best mailing option is	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Less effective than other communications media	*	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Downsizing the company	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Relocation of staff / company	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS3a other	8	2	-	6	6	6	6	8	-	-	6	6	2	-	8
	13%	16%	-%	13%	10%	11%	10%	12%	13%	-%	16%	10%	14%	-%	13%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 88 (continuation)

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QS3b. What is the main reason for the expected decrease in volumes of post? Please choose the most important reason.
Base: All with 2 or more reasons for an decrease in volume

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	c	a	*b	a	*b	*a	*b	*a	b	*a	*b
Unweighted total	60	3	3	53	51	9	59	1	27	13	27	31	6	-
Weighted total	62	2	2	56	51	11	62	*	27	14	31	30	6	-
Postal costs	22	*	2	20	19	3	22	*	7	3	9	12	3	-
	36%	7%	100%	36%	38%	28%	36%	100%	27%	22%	30%	40%	44%	-%
Increase use of emailing services	22	*	-	20	17	4	22	-	11	4	12	10	*	-
	35%	7%	-%	35%	34%	37%	35%	-%	40%	28%	39%	32%	2%	-%
Use of new/digital communication methods	7	-	-	7	3	4	7	-	5	2	2	5	*	-
	11%	-%	-%	12%	5%	35%	11%	-%	17%	13%	6%	16%	2%	-%
Increase use of social media	2	-	-	2	2	-	2	-	-	2	-	2	-	-
	3%	-%	-%	3%	4%	-%	3%	-%	-%	13%	-%	6%	-%	-%
Environmental costs	1	-	-	1	1	-	1	-	1	-	-	1	1	-
	2%	-%	-%	2%	3%	-%	2%	-%	5%	-%	-%	4%	22%	-%
Because of the recession	*	-	-	*	*	-	*	-	*	-	*	-	-	-
	1%	-%	-%	1%	1%	-%	1%	-%	2%	-%	2%	-%	-%	-%
Too complicated - hard to understand what the best mailing option is	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Less effective than other communications media	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Downsizing the company	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Relocation of staff / company	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
QS3a other	8	2	-	6	8	-	8	-	2	3	7	*	2	-
	13%	86%	-%	11%	16%	-%	13%	-%	8%	24%	24%	2%	30%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 88 (continuation)

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QS3b. What is the main reason for the expected decrease in volumes of post? Please choose the most important reason.
Base: All with 2 or more reasons for an decrease in volume

Significance Level: 95%

Unweighted total

Weighted total

Postal costs

 Increase use of emailing
services

 Use of new/digital
communication methods

 Increase use of social
media

Environmental costs

Because of the recession

 Too complicated - hard
to understand what the
best mailing option is

 Less effective than
other communications
media

Downsizing the company

 Relocation of staff /
company

QS3a other

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	*a	*b	*c	*d
60	12	18	17	13
62	13	19	20	11
22	6	9	4	4
36%	46%	46%	20%	34%
22	2	9	7	3
35%	16%	49%	36%	30%
7	1	*	4	1
11%	10%	1%	20%	12%
2	-	-	2	-
3%	-%	-%	9%	-%
1	-	-	1	-
2%	-%	-%	6%	-%
*	-	-	-	*
1%	-%	-%	-%	4%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
-	-	-	-	-
-%	-%	-%	-%	-%
8	3	*	2	2
13%	27%	3%	9%	20%

QS4. Have you or your organisation ever considered trying a postal provider other than Royal Mail or [QV5c provider]?

Base: All Respondents

Significance Level: 95%
Unweighted total
Weighted total
Yes, and we have tried
another provider

Yes, but we have not
tried another provider

No

Don't Know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
206	13	23	9	19	21	39	14	29	21	6	9	3	188
	13%	13%	8%	16%	18%	14%	8%	14%	24%	7%	12%	5%	14%
13%	l	l		gjl	gjl	jl		l	cfgjklm		l		jl
104	9	12	4	6	3	17	16	22	5	6	3	1	94
	10%	7%	4%	5%	3%	6%	9%	10%	6%	7%	4%	2%	7%
6%	el	l				l	ekl	ekl		l			l
1281	73	137	97	92	92	219	158	158	62	74	63	58	1087
	77%	78%	87%	79%	79%	79%	84%	76%	70%	85%	84%	91%	79%
80%			i				i			him	iabdefghi	km	i
13	*	5	2	*	-	4	*	-	1	*	*	1	11
	3%	3%	2%	3%	1%	1%	3%	1%	1%	3%	1%	2%	1%
1%		j										j	

QS4. Have you or your organisation ever considered trying a postal provider other than Royal Mail or [QV5c provider]?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes, and we have tried another provider

Yes, but we have not tried another provider

No

Don't Know

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
206	198	4	2	1	1	8	155	51	200	6	90	55	32	29
13%	13%	10%	20% b	17%	8%	12%	14%	11%	13%	10%	8%	19% a	31% ab	30% ab
104	98	3	1	1	*	5	75	28	101	3	39	24	16	25
6%	6%	8%	9%	14%	5%	8%	7%	6%	7%	5%	4%	8% a	15% ab	26% abc
1281	1232	32	6	5	6	49	900	382	1234	47	976	208	56	41
80%	80% c	81% c	66%	69%	76%	77%	79%	82%	80%	79%	88% bcd	72% cd	53%	43%
13	11	*	1	-	1	2	11	2	10	3	8	4	1	1
1%	1%	1%	5% ab	-%	11% abdf	3% a	1%	*%	1%	6% a	1%	1%	1%	1%

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Table 89 (continuation)

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QS4. Have you or your organisation ever considered trying a postal provider other than Royal Mail or [QV5c provider]?

Base: All Respondents

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	13	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	10	1413	75	43	43	30	274	123	179	217
Yes, and we have tried another provider	206 13%	75 10%	28 9%	36 15% b	41 19% ab	19 24% abc	4 15%	2 20%	145 10%	16 21% a	23 54% abde	12 28% a	9 31% a	69 25%	56 46% a	38 21%	87 40% a
Yes, but we have not tried another provider	104 6%	34 5%	21 7%	13 5%	17 8%	13 16% abcd	4 14% abc	2 22%	64 5%	15 20% a	4 8%	8 20% a	13 44% abcd	31 11%	11 9%	16 9%	27 12%
No	1281 80%	605 84% cdef	262 84% def	185 78% e	158 73% e	46 59% e	20 68%	6 58%	1193 84% bcde	44 58% ce	15 36%	22 51% e	7 25%	173 63% b	55 45%	125 70% b	103 47%
Don't Know	13 1%	5 1%	* *%	4 2% b	2 1%	* *%	1 2% b	- -%	11 1%	* 1%	1 2%	* 1%	- -%	1 *%	* *%	* *%	1 *%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 89 (continuation)

Page 725

QS4. Have you or your organisation ever considered trying a postal provider other than Royal Mail or [QV5c provider]?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes, and we have tried another provider

Yes, but we have not tried another provider

No

Don't Know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
Weighted total	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
206	83	34	83	188	114	190	158	66	163	133	190	59	151	138
13%	10%	12%	17% a	13%	13%	13%	22% abcf	17% abcf	13%	20% b	13%	25% b	13%	13%
104	41	16	46	92	63	94	78	30	80	68	96	23	78	76
6%	5%	6%	9% a	6%	7%	6%	11% abcf	8%	6%	10% b	6%	10% b	7%	7%
1281	681	227	366	1186	722	1207	487	281	1017	465	1182	150	958	856
80%	84% c	81% c	74% c	80% de	80% de	80% de	67% d	74% d	80% de	69% ac	80% ac	64% ac	80% ac	80% ac
13	7	4	2	12	5	12	6	3	9	3	12	1	7	6
1%	1%	2%	*%	1%	1%	1%	1%	1%	1%	*%	1%	1%	1%	1%

Table 89 (continuation)

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Base: All Respondents

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked and / or Timed Services	Standard Delivery	International / Gross border	Increase	Decrease	Stay the same
Significance Level: 95% Unweighted total	1604	a 276	b 35	c 1269	a 1571	b 1376	c 1577	d 1226	e 1595	f 1	a 924	b 1572	c 408	a 158	b 242	c 1201
Weighted total	1604	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Yes, and we have tried another provider	206 13%	34 13%	6 17%	148 12%	204 13%	189 14%	206 13%	188 16% e	206 13%	- -%	134 15%	204 13%	70 20% ab	36 24% bc	20 8%	149 12%
Yes, but we have not tried another provider	104 6%	17 7%	4 11%	84 7%	101 6%	93 7%	101 6%	95 8%	104 7%	- -%	83 9% b	102 7%	37 10% b	22 15% bc	14 6%	68 6%
No	1281 80%	209 80%	26 72%	1044 81%	1243 80% d	1052 78%	1247 80% d	908 76%	1270 80% d	2 100%	671 75% c	1249 80% ac	247 69%	88 61% a	203 85% a	989 81% a
Don't Know	13 1%	* -%	- -%	10 1%	13 1%	12 1%	13 1%	11 1%	13 1%	- -%	8 1%	13 1%	3 1%	* -%	2 1%	9 1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 89 (continuation)

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QS4. Have you or your organisation ever considered trying a postal provider other than Royal Mail or [QV5c provider]?

Base: All Respondents

Significance Level: 95%
Unweighted total
Weighted total

Yes, and we have tried
another provider

Yes, but we have not
tried another provider

No

Don't Know

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
1604	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
206	206	-	-	158	47	204	2	110	17	78	109	120	6
13%	100%	-%	-%	14%	9%	14%	2%	11%	14%	20%	9%	32%	72%
	bc			b		b				b			
104	-	104	-	71	33	100	4	60	10	39	64	37	1
6%	-%	100%	-%	6%	6%	7%	3%	6%	8%	10%	5%	10%	12%
		ac								b			
1281	-	-	1281	857	424	1187	95	861	94	278	991	216	1
80%	-%	-%	100%	78%	83%	79%	89%	83%	77%	70%	84%	57%	16%
			ab		a		a				a		
13	-	-	-	8	5	6	7	6	2	*	10	3	-
1%	-%	-%	-%	1%	1%	1%	6%	1%	1%	1%	1%	1%	-%
						a							

QS4. Have you or your organisation ever considered trying a postal provider other than Royal Mail or [QV5c provider]?

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes, and we have tried

another provider

Yes, but we have not

tried another provider

No

Don't Know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
206	56	49	50	51
13%	14%	12%	12%	13%
104	28	29	20	26
6%	7%	7%	5%	7%
1281	307	323	336	315
80%	78%	80%	82%	79%
13	-	1	5	7
1%	-%	*%	1%	2%
			a	ab

Table 90
QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?

Base: All those not considering another supplier

	TOTAL	GOR												
		East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	1294	52	80	65	94	92	158	110	89	62	177	163	152	802
Weighted total	1281	73	137	97	92	92	219	158	158	62	74	63	58	1087
We don't mail large enough volumes	351 27%	26 35% bl	22 16%	27 28%	27 29% bl	32 35% bl	69 31% bl	40 25%	47 29% bl	17 28% l	18 25%	17 27% l	9 16%	306 28% bl
Happy / satisfied with the service from current provider	194 15%	7 10% cek	27 20%	8 8%	19 21% cek	8 9%	36 17% k	22 14%	27 17% k	10 16%	13 18% ek	5 8%	10 17% k	165 15% k
Our chosen provider is reliable enough for our needs	178 14%	6 8%	18 13%	13 14%	10 10%	15 16%	32 14%	18 12%	29 18%	6 10%	9 13%	10 15%	13 22% adgijlm	146 13%
We are near a Post Office	135 11%	5 7%	18 13%	4 4%	9 10%	7 7%	18 8%	23 15% c	24 15% c	6 9%	9 12%	7 12%	6 10%	113 10%
Convenience / easier / suits our needs	124 10%	7 10%	15 11%	6 6%	4 5%	4 5%	23 11%	17 11%	18 11%	11 17% cdel	8 10%	6 10%	4 6%	106 10%
Unaware of other providers	109 8%	4 5%	15 11%	13 13% f	5 6%	7 8%	11 5%	16 10%	8 5%	4 6%	8 11%	10 15% dfhm	8 14% dfhm	83 8%
Support Royal Mail / local Post Office / I'm against privatisation	82 6%	5 7%	6 5%	7 8%	7 7%	7 7%	11 5%	16 10%	9 6%	1 2%	5 7%	3 5%	3 6%	70 6%
No need to change - no demand / requirement to change	81 6%	9 12% j	11 8%	9 9%	5 6%	4 4%	13 6%	8 5%	11 7%	3 4%	3 4%	4 6%	3 5%	72 7%
Not considered / haven't thought about it / no time / it's not my decision	71 6%	4 5%	9 7%	4 4%	6 6%	2 2%	15 7%	9 6%	9 6%	3 4%	2 3%	6 10% ejm	3 5%	60 6%
Our chosen provider is safe enough for our needs	44 3%	2 2%	7 5%	2 2%	4 4%	4 4%	6 3%	2 1%	6 4%	* 1%	4 5%	4 6%	4 7% gm	33 3%
Don't know enough about what other providers offer	38 3%	2 2%	5 3%	4 4%	3 3%	5 6% h	7 3%	4 2%	- -%	1 2%	3 4%	2 3%	3 5% h	30 3%
Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m														

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Table 90 (continuation)

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?

Base: All those not considering another supplier

Significance Level: 95%
Unweighted total
Weighted total

Our chosen provider is
fast enough for our
needs

Always been with them /
always use them

Others more expensive
than our current
providers

Don't know enough about
other providers and
their services

Other providers don't
pick up mail in this
area

Other providers could
not deliver to all the
areas we need

Other operators do not
provide the service I
need

Our customers prefer our
chosen provider

Close to a post box

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1294	a	b	c	d	e	f	g	h	i	j	k	l	m
1281	52	80	65	94	92	158	110	89	62	177	163	152	802
	73	137	97	92	92	219	158	158	62	74	63	58	1087
36	2	7	2	5	3	2	2	6	-	2	3	3	28
3%	2%	5%	2%	6% f	3%	1%	1%	4%	-%	3%	4%	5% f	3%
35	-	*	2	4	*	7	9	5	-	4	3	*	28
3%	-%	*%	2%	5% l	*%	3% l	6% bel	3%	-%	6% beilm	4% l	*%	3%
32	2	6	5	*	2	6	*	4	1	1	2	2	27
3%	2%	5% g	6% dg	*%	2%	3%	*%	3%	2%	1%	4%	4%	2%
29	2	2	4	5	1	6	-	4	*	3	1	1	25
2%	3%	2%	4% g	6% gkl	1%	3%	-%	3%	*%	4% g	1%	1%	2%
21	7	2	*	-	-	2	-	4	1	2	*	2	17
2%	10% bcdefgk lm	2%	*%	-%	-%	1%	-%	3%	2%	3%	1%	3%	2%
12	2	2	*	-	3	2	-	*	-	2	1	1	9
1%	2%	2%	*%	-%	3% m	1%	-%	*%	-%	2%	2%	1%	1%
7	2	-	-	1	*	2	-	-	-	1	*	1	5
1%	2%	-%	-%	1%	*%	1%	-%	-%	-%	1%	*%	2%	*%
4	-	-	2	-	-	*	-	-	-	*	*	1	2
*%	-%	-%	2% m	-%	-%	*%	-%	-%	-%	1%	1%	2% m	*%
3	-	-	-	*	-	2	-	-	-	*	-	*	2
*%	-%	-%	-%	*%	-%	1%	-%	-%	-%	1%	-%	1%	*%
40	-	2	2	8	2	9	11	-	1	3	1	1	35
3%	-%	2%	2% abe hklm	9% 9%	2%	4%	7% hk	-%	2%	4%	2%	2%	3%
23	*	*	4	1	3	2	4	3	3	1	2	1	19
2%	*%	*%	4%	1%	3%	1%	2%	2%	5%	1%	3%	1%	2%

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Table 90 (continuation)

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?

Base: All those not considering another supplier

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1294	990	197	38	30	39	304	866	428	1194	100	906	233	82	73
Weighted total	1281	1232	32	6	5	6	49	900	382	1234	47	976	208	56	41
We don't mail large enough volumes	351 27%	344 28% bcdef	6 18%	1 9%	* 9%	1 9%	7 15%	238 26%	113 30%	340 28%	11 24%	326 33% bcd	15 7% d	9 16% bd	* 1%
Happy / satisfied with the service from current provider	194 15%	180 15%	9 28% ad	2 36% ad	1 10%	1 23%	13 27% ad	144 16%	50 13%	187 15%	6 13%	130 13%	42 20% a	15 27% a	6 15%
Our chosen provider is reliable enough for our needs	178 14%	169 14%	5 17%	1 11%	1 29% a	1 12%	8 17%	128 14%	49 13%	171 14%	7 15%	123 13%	41 20% a	8 14%	5 12%
We are near a Post Office	135 11%	132 11%	2 7%	* 2%	* 8%	1 9%	3 7%	93 10%	42 11%	134 11% b	1 3%	110 11% d	19 9% d	6 11% d	* 1%
Convenience / easier / suits our needs	124 10%	117 10%	4 12%	* 7%	1 15%	1 18%	6 13%	84 9%	40 10%	118 10%	5 11%	89 9%	29 14% ac	2 4%	3 7%
Unaware of other providers	109 8%	106 9% f	2 6%	* 6%	* 2%	* 4%	2 5%	81 9%	28 7%	105 8%	4 8%	84 9%	11 5%	3 5%	10 25% abc
Support Royal Mail / local Post Office / I'm against privatisation	82 6%	80 6%	2 5%	* 4%	- -%	* 2%	2 4%	49 5%	33 9% a	81 7%	1 2%	50 5%	21 10% a	6 11% a	4 10%
No need to change - no demand / requirement to change	81 6%	79 6%	1 4%	* 5%	- -%	* 2%	2 4%	55 6%	26 7%	79 6%	2 4%	63 6%	17 8% d	1 2%	* 1%
Not considered / haven't thought about it / no time / it's not my decision	71 6%	66 5%	3 9%	1 9%	1 11%	1 11%	5 9% a	48 5%	23 6%	63 5%	8 16% a	41 4%	20 10% a	5 8%	5 13% a
Our chosen provider is safe enough for our needs	44 3%	42 3%	1 3%	* 2%	* 9%	* 3%	2 3%	30 3%	14 4%	41 3%	3 6%	37 4% b	2 1%	2 4%	2 5% b
Don't know enough about what other providers offer	38 3%	37 3%	1 2%	- -%	* 4%	* 2%	1 2%	26 3%	12 3%	36 3%	2 4%	23 2%	9 4%	4 7% a	2 6%
Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d															

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?

Base: All those not considering another supplier

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1294	990	197	38	30	39	304	866	428	1194	100	906	233	82	73
Weighted total	1281	1232	32	6	5	6	49	900	382	1234	47	976	208	56	41
Our chosen provider is fast enough for our needs	36 3%	35 3%	1 3%	* 2%	* 4%	- -%	1 2%	23 3%	13 3%	36 3%	* 1%	30 3%	6 3%	* %	* %
Always been with them / always use them	35 3%	33 3%	2 6% a	- -%	- -%	* 7%	2 5%	23 3%	12 3%	32 3%	3 6% a	25 3%	5 2%	3 5%	2 6%
Others more expensive than our current providers	32 3%	31 2%	1 3%	* 2%	* 9% a	* 3%	2 3%	28 3% b	4 1%	32 3%	* %	22 2%	5 3%	5 8% abd	* %
Don't know enough about other providers and their services	29 2%	27 2%	1 4%	* 2%	- -%	- -%	1 3%	17 2%	12 3%	29 2%	- -%	23 2%	5 3%	* 1%	* 1%
Other providers don't pick up mail in this area	21 2%	21 2%	- -%	* 2%	* 3% b	* 2% b	* 1%	5 1%	16 4% a	21 2%	* %	18 2%	3 1%	- -%	1 2%
Other providers could not deliver to all the areas we need	12 1%	11 1%	1 2%	* 2%	* 2%	* 2%	1 2%	8 1%	4 1%	12 1%	* %	8 1%	3 2%	1 1%	1 2%
Other operators do not provide the service I need	7 1%	7 1%	1 2%	- -%	- -%	- -%	1 1%	4 %	3 1%	7 1%	- -%	5 %	2 1%	* 1%	* %
Our customers prefer our chosen provider	4 %	4 %	* %	- -%	- -%	- -%	* %	3 %	1 %	4 %	* %	4 %	1 %	- -%	- -%
Close to a post box	3 %	3 %	* 1%	- -%	- -%	- -%	* %	1 %	2 %	3 %	- -%	3 %	* %	- -%	- -%
Other	40 3%	39 3%	1 3%	- -%	* 6%	- -%	1 3%	35 4% b	5 1%	40 3%	* 1%	28 3%	7 3%	1 1%	4 11% abc
Don't know	23 2%	19 2%	1 4% a	1 19% abf	* 7% a	1 16% ab	4 8% a	17 2%	6 2%	20 2%	3 7% a	14 1%	4 2%	2 4%	3 7% ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?
Base: All those not considering another supplier

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	*g	a	b	*c	*d	*e	a	b	a	b
Unweighted total	1294	533	258	172	190	85	51	5	1170	62	23	24	15	193	53	141	106
Weighted total	1281	605	262	185	158	46	20	6	1193	44	15	22	7	173	55	125	103
We don't mail large enough volumes	351	231	63	28	21	5	2	-	343	4	2	2	*	25	1	17	8
	27%	38%	24%	15%	13%	11%	12%	-%	29%	10%	12%	8%	2%	14%	1%	14%	8%
		bcd	e						b					b			
Happy / satisfied with the service from current provider	194	76	36	35	31	10	4	-	167	10	7	6	3	44	23	33	34
	15%	13%	14%	19%	20%	23%	22%	-%	14%	24%	47%	25%	39%	26%	42%	27%	33%
				a	a	ab				a					a		
Our chosen provider is reliable enough for our needs	178	73	40	25	28	9	2	-	163	9	3	2	1	27	8	22	13
	14%	12%	15%	14%	18%	20%	11%	-%	14%	21%	22%	7%	8%	16%	15%	18%	13%
					a												
We are near a Post Office	135	85	12	22	12	2	2	-	130	5	*	*	*	9	2	7	4
	11%	14%	5%	12%	7%	5%	9%	-%	11%	11%	1%	2%	1%	5%	3%	5%	4%
		bde		b													
Convenience / easier / suits our needs	124	51	33	21	14	3	*	-	117	4	2	*	-	13	*	7	6
	10%	8%	13%	11%	9%	7%	2%	-%	10%	10%	13%	1%	-%	8%	1%	6%	6%
			f	f													
Unaware of other providers	109	42	22	25	11	4	5	-	99	1	2	6	-	12	5	10	7
	8%	7%	8%	14%	7%	9%	25%	-%	8%	3%	15%	26%	-%	7%	9%	8%	7%
				ad			abde										
Support Royal Mail / local Post Office / I'm against privatisation	82	25	25	13	16	3	*	-	75	5	-	2	-	10	1	6	5
	6%	4%	10%	7%	10%	6%	1%	-%	6%	11%	-%	8%	-%	6%	2%	5%	5%
			af		af												
No need to change - no demand / requirement to change	81	30	27	10	10	3	*	-	78	1	-	2	*	16	4	13	7
	6%	5%	10%	6%	6%	7%	2%	-%	7%	3%	-%	8%	2%	9%	8%	10%	7%
			a														
Not considered / haven't thought about it / no time / it's not my decision	71	22	13	15	13	7	1	-	67	1	*	2	*	9	2	10	1
	6%	4%	5%	8%	8%	15%	6%	-%	6%	2%	2%	9%	6%	5%	4%	8%	1%
				a	a	ab										b	
Our chosen provider is safe enough for our needs	44	27	7	4	2	3	*	2	44	*	-	*	-	12	-	9	3
	3%	4%	3%	2%	1%	6%	1%	32%	4%	1%	-%	*%	-%	7%	-%	7%	3%
		d				d											

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?

Base: All those not considering another supplier

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	e	d	e	a	b	a	b
Unweighted total	1294	533	258	172	190	85	51	5	1170	62	23	24	15	193	53	141	106
Weighted total	1281	605	262	185	158	46	20	6	1193	44	15	22	7	173	55	125	103
Don't know enough about what other providers offer	38	17	3	4	9	1	1	2	30	2	*	2	3	6	5	6	5
	3%	3%	1%	2%	6% b	3%	5%	32%	3%	5%	3%	10%	42%	3%	10%	5%	5%
Our chosen provider is fast enough for our needs	36	21	8	3	3	1	*	-	36	*	-	*	-	5	-	3	2
	3%	3%	3%	2%	2%	1%	1%	-%	3%	*%	-%	*%	-%	3%	-%	3%	2%
Always been with them / always use them	35	14	6	3	11	1	-	-	32	3	-	*	-	3	*	2	1
	3%	2%	2%	2%	7% abc	3%	-%	-%	3%	6%	-%	2%	-%	2%	1%	2%	1%
Others more expensive than our current providers	32	7	13	4	7	1	*	-	25	2	*	2	2	6	6	3	9
	3%	1%	5% a	2%	4% a	1%	2%	-%	2%	5%	1%	9%	33%	3%	12% a	3%	9% a
Don't know enough about other providers and their services	29	10	9	6	3	1	-	-	28	*	-	*	-	*	3	-	4
	2%	2%	3%	3%	2%	2%	-%	-%	2%	*%	-%	1%	-%	*%	6% a	-%	3% a
Other providers don't pick up mail in this area	21	10	5	3	2	-	*	*	21	-	*	-	*	2	-	2	-
	2%	2%	2%	2%	1%	-%	1%	3%	2%	-%	3%	-	2%	1%	-%	1%	-%
Other providers could not deliver to all the areas we need	12	4	1	3	2	-	2	*	11	-	*	-	*	1	*	1	1
	1%	1%	*%	2%	1%	-%	8% abcde	3%	1%	-%	3%	-%	2%	1%	*%	*%	1%
Other operators do not provide the service I need	7	5	1	2	*	-	*	-	7	-	-	-	-	2	*	2	*
	1%	1%	*%	1%	*%	-%	1%	-%	1%	-%	-%	-%	-%	1%	*%	2%	*%
Our customers prefer our chosen provider	4	3	*	*	1	-	-	-	4	-	-	-	-	*	-	-	*
	*%	*%	*%	*%	*%	-%	-%	-%	*%	-%	-%	-%	-%	*%	-%	-%	*%
Close to a post box	3	2	*	-	-	-	*	-	3	*	-	-	-	-	*	-	*
	*%	*%	*%	-%	-%	-%	1%	-%	*%	*%	-%	-%	-%	-%	*%	-%	*%
Other	40	23	4	4	4	1	*	4	35	4	-	1	-	5	*	3	2
	3%	4%	1%	2%	3%	2%	2%	64%	3%	9% a	-%	3%	-%	3%	1%	2%	2%
Don't know	23	8	5	1	5	3	1	*	17	2	1	2	-	10	1	4	7
	2%	1%	2%	*%	3% c	6% abc	4% c	2%	1%	6% a	9%	10%	-%	6%	3%	4%	7%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?

Base: All those not considering another supplier

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail		
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services	
Significance Level: 95%	1294	a	b	c	a	b	c	d	e	f	a	b	c	a	b
	Unweighted total	665	242	381	1199	758	1217	532	337	1019	503	1199	193	977	889
Weighted total	1281	681	227	366	1186	722	1207	487	281	1017	465	1182	150	958	856
	We don't mail large enough volumes	351	254	32	61	316	175	321	91	38	252	84	320	25	251
27%	37%	14%	17%	27%	24%	27%	19%	14%	25%	18%	27%	16%	26%	25%	
	bc			de	de	de			de	ac					
Happy / satisfied with the service from current provider	194	92	36	66	187	110	189	93	56	153	85	184	29	151	145
	15%	13%	16%	18% a	16%	15%	16%	19% f	20% f	15%	18%	16%	19%	16%	17%
Our chosen provider is reliable enough for our needs	178	80	34	63	167	114	170	96	50	146	78	169	28	141	121
	14%	12%	15%	17% a	14%	16%	14%	20% acf	18%	14%	17%	14%	19%	15%	14%
We are near a Post Office	135	75	26	34	115	67	121	46	26	118	44	118	10	98	78
	11%	11%	11%	9%	10%	9%	10%	9%	9%	12%	9%	10%	7%	10%	9%
Convenience / easier / suits our needs	124	63	26	35	122	72	122	52	37	103	48	121	13	92	97
	10%	9%	11%	10%	10%	10%	10%	11%	13%	10%	10%	10%	9%	10%	11%
Unaware of other providers	109	49	16	41	100	67	106	33	29	90	34	104	15	83	73
	8%	7%	7%	11% a	8%	9%	9%	7%	10%	9%	7%	9%	10%	9%	8%
Support Royal Mail / local Post Office / I'm against privatisation	82	33	13	36	77	52	77	29	28	64	32	77	12	65	61
	6%	5%	6%	10% a	6%	7%	6%	6%	10% acdf	6%	7%	7%	8%	7%	7%
No need to change - no demand / requirement to change	81	33	26	21	80	45	81	33	17	63	32	80	14	61	52
	6%	5%	12% ac	6%	7%	6%	7%	7%	6%	6%	7%	7%	10%	6%	6%
Not considered / haven't thought about it / no time / it's not my decision	71	33	17	20	64	48	65	22	18	60	29	65	20	57	54
	6%	5%	8%	5%	5%	7%	5%	4%	7%	6%	6%	5%	13% ab	6%	6%
Our chosen provider is safe enough for our needs	44	18	12	14	38	28	41	24	8	30	24	39	9	32	27
	3%	3%	5%	4%	3%	4%	3%	5%	3%	3%	5%	3%	6%	3%	3%
Don't know enough about what other providers offer	38	18	6	14	37	17	38	20	10	29	17	35	7	26	28
	3%	3%	2%	4%	3%	2%	3%	4%	4%	3%	4%	3%	4%	3%	3%

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Base: All those not considering another supplier

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?
Base: All those not considering another supplier

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%																
Unweighted total	1294	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Weighted total	1281	220	28	1042	1264	1093	1269	946	1286	1	700	1265	287	94	202	997
		209	26	1044	1243	1052	1247	908	1270	2	671	1249	247	88	203	989
We don't mail large enough volumes	351	36	7	307	328	273	330	207	346	2	155	335	53	11	61	279
	27%	17%	27%	29% a	26%	26%	26%	23%	27% d	100%	23%	27%	21%	12%	30% a	28% a
Happy / satisfied with the service from current provider	194	29	2	157	190	164	190	142	192	-	98	189	44	13	15	166
	15%	14%	8%	15%	15%	16%	15%	16%	15%	-%	15%	15%	18%	13% b	7%	17% b
Our chosen provider is reliable enough for our needs	178	35	5	139	175	153	175	133	177	-	97	174	34	11	29	138
	14%	17%	20%	13%	14%	15%	14%	15%	14%	-%	14%	14%	14%	12%	14%	14%
We are near a Post Office	135	14	1	120	126	112	130	96	135	-	76	127	22	10	10	115
	11%	7%	5%	12% a	10%	11%	10%	11%	11%	-%	11%	10%	9%	12% b	5%	12% b
Convenience / easier / suits our needs	124	24	5	98	119	101	120	91	124	-	69	120	18	8	19	96
	10%	12%	19%	9%	10%	10%	10%	10%	10%	-%	10%	10%	7%	10%	9%	10%
Unaware of other providers	109	20	5	85	106	90	107	83	107	-	57	108	15	14	16	79
	8%	9%	18%	8%	9%	9%	9%	9%	8%	-%	8%	9%	6%	15% c	8%	8%
Support Royal Mail / local Post Office / I'm against privatisation	82	11	-	71	82	72	82	67	82	-	47	78	25	6	17	60
	6%	5%	-%	7%	7%	7%	7%	7%	6%	-%	7%	6%	10% b	7%	8%	6%
No need to change - no demand / requirement to change	81	9	-	70	79	62	79	62	81	-	50	81	23	2	16	62
	6%	4%	-%	7%	6%	6%	6%	7%	6%	-%	7%	6%	9%	3%	8%	6%
Not considered / haven't thought about it / no time / it's not my decision	71	13	*	57	69	55	69	50	69	-	38	68	23	10	17	44
	6%	6%	*%	5%	6%	5%	6%	5%	5%	-%	6%	5%	9% ab	11% c	9% c	4% 4%
Our chosen provider is safe enough for our needs	44	7	2	34	44	40	44	32	44	-	31	43	9	9	5	30
	3%	3%	9%	3%	4%	4%	4%	4%	3%	-%	5%	3%	3%	10% bc	2%	3%
Don't know enough about what other providers offer	38	8	4	26	36	30	36	30	38	-	22	38	10	6	4	28
	3%	4%	15%	2%	3%	3%	3%	3%	3%	-%	3%	3%	4%	6%	2%	3%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?

Base: All those not considering another supplier

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	1294	220	28	1042	1264	1093	1269	946	1286	1	700	1265	287	94	202	997
Weighted total	1281	209	26	1044	1243	1052	1247	908	1270	2	671	1249	247	88	203	989
Our chosen provider is fast enough for our needs	36 3%	3 1%	* 2%	31 3%	36 3%	33 3%	36 3%	27 3%	36 3%	- -%	25 4%	36 3%	11 4%	8 9% bc	7 3%	21 2%
Always been with them / always use them	35 3%	9 4%	- -%	26 3%	35 3%	29 3%	35 3%	23 3%	35 3%	- -%	19 3%	35 3%	7 3%	2 2%	3 1%	30 3%
Others more expensive than our current providers	32 3%	14 7% c	2 7%	19 2%	32 3%	30 3%	32 3%	25 3%	32 3%	- -%	24 4%	32 3%	10 4%	5 5% c	10 5% c	18 2%
Don't know enough about other providers and their services	29 2%	5 2%	2 9%	24 2%	29 2%	18 2%	29 2%	20 2%	27 2%	- -%	15 2%	29 2%	8 3%	* 1%	6 3%	23 2%
Other providers don't pick up mail in this area	21 2%	6 3%	- -%	16 1%	20 2%	18 2%	20 2%	16 2%	21 2%	- -%	9 1%	20 2%	2 1%	- -%	8 4% c	13 1%
Other providers could not deliver to all the areas we need	12 1%	1 *%	- -%	11 1%	12 1%	8 1%	12 1%	7 1%	10 1%	- -%	5 1%	11 1%	3 1%	1 1%	3 1%	9 1%
Other operators do not provide the service I need	7 1%	1 *%	- -%	7 1%	7 1%	5 1%	7 1%	5 1%	7 1%	- -%	4 1%	7 1%	3 1%	- -%	2 1%	5 1%
Our customers prefer our chosen provider	4 *%	2 1% c	- -%	2 *%	4 *%	4 *%	4 *%	4 *%	4 *%	- -%	4 1%	4 *%	1 1%	- -%	* *%	4 *%
Close to a post box	3 *%	- -%	- -%	3 *%	3 *%	2 *%	3 *%	2 *%	3 *%	- -%	2 *%	3 *%	- -%	- -%	* *%	2 *%
Other	40 3%	10 5%	- -%	28 3%	40 3%	32 3%	40 3%	31 3%	39 3%	- -%	27 4%	40 3%	10 4%	3 3%	11 5%	26 3%
Don't know	23 2%	3 1%	* *%	19 2%	23 2%	20 2%	23 2%	20 2%	23 2%	- -%	15 2%	23 2%	3 1%	- -%	4 2%	19 2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?
Base: All those not considering another supplier

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	c	a	b	a	b	a	b	a	b	a	*b
Unweighted total	1294	-	-	1294	874	420	1199	95	891	91	275	1003	235	1
Weighted total	1281	-	-	1281	857	424	1187	95	861	94	278	991	216	1
We don't mail large enough volumes	351	-	-	351	240	111	322	29	221	23	79	270	23	-
	27%	-%	-%	27%	28%	26%	27%	31%	26%	24%	28%	27%	11%	-%
Happy / satisfied with the service from current provider	194	-	-	194	127	66	184	9	147	7	30	159	65	1
	15%	-%	-%	15%	15%	16%	16%	10%	17%	8%	11%	16%	30%	100%
									b			a		
Our chosen provider is reliable enough for our needs	178	-	-	178	115	63	160	17	139	8	16	160	36	-
	14%	-%	-%	14%	13%	15%	13%	18%	16%	8%	6%	16%	17%	-%
									b			a		
We are near a Post Office	135	-	-	135	89	46	123	12	110	4	20	115	11	-
	11%	-%	-%	11%	10%	11%	10%	13%	13%	5%	7%	12%	5%	-%
									b			a		
Convenience / easier / suits our needs	124	-	-	124	80	44	117	7	88	9	22	101	13	-
	10%	-%	-%	10%	9%	10%	10%	7%	10%	9%	8%	10%	6%	-%
Unaware of other providers	109	-	-	109	80	29	101	8	55	15	47	60	17	-
	8%	-%	-%	8%	9%	7%	9%	8%	6%	16%	17%	6%	8%	-%
										a	b			
Support Royal Mail / local Post Office / I'm against privatisation	82	-	-	82	57	25	77	5	56	8	14	68	10	-
	6%	-%	-%	6%	7%	6%	6%	5%	7%	8%	5%	7%	4%	-%
No need to change - no demand / requirement to change	81	-	-	81	53	28	76	5	53	6	13	66	16	-
	6%	-%	-%	6%	6%	6%	6%	6%	6%	7%	5%	7%	8%	-%
Not considered / haven't thought about it / no time / it's not my decision	71	-	-	71	47	24	66	5	49	1	18	53	11	-
	6%	-%	-%	6%	5%	6%	6%	5%	6%	1%	6%	5%	5%	-%
Our chosen provider is safe enough for our needs	44	-	-	44	26	18	43	1	33	1	2	41	11	-
	3%	-%	-%	3%	3%	4%	4%	1%	4%	1%	1%	4%	5%	-%
												a		
Don't know enough about what other providers offer	38	-	-	38	28	10	34	4	21	8	13	25	11	-
	3%	-%	-%	3%	3%	2%	3%	4%	2%	8%	5%	3%	5%	-%
										a				

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?
Base: All those not considering another supplier

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		*a	*b	c	a	b	a	b	a	b	a	b	a	*b
Unweighted total	1294	-	-	1294	874	420	1199	95	891	91	275	1003	235	1
Weighted total	1281	-	-	1281	857	424	1187	95	861	94	278	991	216	1
Our chosen provider is fast enough for our needs	36	-	-	36	20	16	35	1	28	-	5	30	7	-
	3%	-%	-%	3%	2%	4%	3%	1%	3%	-%	2%	3%	3%	-%
Always been with them / always use them	35	-	-	35	21	14	31	4	28	2	7	28	3	-
	3%	-%	-%	3%	3%	3%	3%	4%	3%	3%	3%	3%	2%	-%
Others more expensive than our current providers	32	-	-	32	26	6	32	*	16	3	11	21	12	-
	3%	-%	-%	3%	3%	1%	3%	1%	2%	3%	4%	2%	6%	-%
Don't know enough about other providers and their services	29	-	-	29	23	6	26	3	16	3	8	20	4	-
	2%	-%	-%	2%	3%	1%	2%	3%	2%	4%	3%	2%	2%	-%
Other providers don't pick up mail in this area	21	-	-	21	15	7	21	*	20	*	5	17	2	-
	2%	-%	-%	2%	2%	2%	2%	1%	2%	1%	2%	2%	1%	-%
Other providers could not deliver to all the areas we need	12	-	-	12	7	5	10	2	6	*	3	9	1	-
	1%	-%	-%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	-%
Other operators do not provide the service I need	7	-	-	7	6	1	7	-	7	*	1	7	2	-
	1%	-%	-%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	-%
Our customers prefer our chosen provider	4	-	-	4	2	2	4	-	1	-	1	3	*	-
	1%	-%	-%	1%	1%	1%	1%	-%	1%	-%	1%	1%	1%	-%
Close to a post box	3	-	-	3	2	1	2	*	1	2	-	3	*	-
	1%	-%	-%	1%	1%	1%	1%	1%	1%	2%	-	1%	1%	-%
Other	40	-	-	40	22	18	38	2	19	6	12	26	4	-
	3%	-%	-%	3%	3%	4%	3%	2%	2%	6%	4%	3%	2%	-%
Don't know	23	-	-	23	7	16	20	3	10	4	10	12	10	-
	2%	-%	-%	2%	1%	4%	2%	3%	1%	4%	3%	1%	5%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?
Base: All those not considering another supplier

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1294	318	330	334	312
Weighted total	1281	307	323	336	315
We don't mail large enough volumes	351 27%	84 27%	82 25%	114 34% bd	71 22%
Happy / satisfied with the service from current provider	194 15%	50 16%	58 18% d	49 15%	37 12%
Our chosen provider is reliable enough for our needs	178 14%	56 18% d	54 17% d	45 14% d	22 7%
We are near a Post Office	135 11%	28 9%	30 9%	28 8%	48 15% abc
Convenience / easier / suits our needs	124 10%	16 5%	51 16% acd	32 10% a	25 8%
Unaware of other providers	109 8%	23 8%	19 6%	30 9%	37 12% b
Support Royal Mail / local Post Office / I'm against privatisation	82 6%	18 6%	27 8% d	27 8% d	10 3%
No need to change - no demand / requirement to change	81 6%	17 6%	17 5%	20 6%	27 9%
Not considered / haven't thought about it / no time / it's not my decision	71 6%	12 4%	15 5%	14 4%	29 9% abc
Our chosen provider is safe enough for our needs	44 3%	13 4%	6 2%	17 5% b	8 2%
Don't know enough about what other providers offer	38 3%	14 4% c	10 3%	4 1%	11 4% c

Columns Tested: a,b,c,d

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Table 90 (continuation)

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QS5. What are the main reasons for not considering using a postal service provider other than Royal Mail or [QV5c provider] at least for some items?
Base: All those not considering another supplier

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1294	318	330	334	312
Weighted total	1281	307	323	336	315
Our chosen provider is fast enough for our needs	36 3%	2 1%	8 2%	19 6% abd	7 2%
Always been with them / always use them	35 3%	13 4% c	12 4% c	* *% *	10 3% c
Others more expensive than our current providers	32 3%	15 5% d	7 2%	7 2%	3 1%
Don't know enough about other providers and their services	29 2%	20 6% bcd	5 2% c	* *% *	4 1%
Other providers don't pick up mail in this area	21 2%	5 2%	5 2%	6 2%	5 2%
Other providers could not deliver to all the areas we need	12 1%	5 2%	1 *%	3 1%	2 1%
Other operators do not provide the service I need	7 1%	5 2% b	- -%	1 *%	2 1%
Our customers prefer our chosen provider	4 *%	* *%	1 *%	* *%	2 1%
Close to a post box	3 *%	- -%	3 1%	- -%	- -%
Other	40 3%	13 4%	6 2%	9 3%	12 4%
Don't know	23 2%	7 2%	3 1%	5 1%	9 3%

Columns Tested: a,b,c,d

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

Base: All Respondents

Significance Level: 95%
Unweighted total
Weighted total

Yes

No

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
	a	b	c	d	e	f	g	h	i	j	k	l	m
1604	66	106	78	119	114	205	131	117	87	214	193	174	1023
1604	95	176	112	117	116	278	189	209	88	87	75	63	1379
1095	64	110	72	74	83	202	125	156	62	60	45	42	948
68%	67%	62%	64%	63%	72% k	73% k	66%	75% bk	70%	69% k	60%	66%	69% k
509	31	67	40	43	32	76	63	53	26	27	30	21	431
32%	33%	38% h	36%	37%	28%	27%	34%	25%	30%	31%	40% ethjm	34%	31%

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

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
1095	1049	28	7	5	6	46	762	333	1056	39	748	210	78	59
68%	68%	73%	71%	69%	70%	72%	67%	72% a	68%	66%	67%	72% d	75% d	62%
509	491	11	3	2	2	18	379	130	489	20	365	81	27	36
32%	32%	27%	29%	31%	30%	28%	33% b	28%	32%	34%	33%	28%	25%	38% bc

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

Base: All Respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%	a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	1413	75	43	43	30	274	123	179	217
Yes	1095	460	226	165	161	58	24	966	48	30	30	21	191	95	123	162
	68%	64%	73%	69%	74%	75%	83%	68%	64%	70%	70%	71%	70%	77%	69%	75%
		a		a	a	a	ac									
No	509	259	86	74	57	20	5	447	27	13	13	9	83	28	56	54
	32%	36%	27%	31%	26%	25%	17%	32%	36%	30%	30%	29%	30%	23%	31%	25%
	bdef		f													

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
1095	555	209	319	1016	661	1034	524	281	885	491	1018	163	841	738
68%	68%	74%	64%	69%	73%	69%	72%	74%	70%	73%	69%	70%	70%	69%
		c			ac			ac		b				
509	257	73	179	462	243	469	206	99	383	178	463	71	353	338
32%	32%	26%	36%	31%	27%	31%	28%	26%	30%	27%	31%	30%	30%	31%
			b	be		be				a				

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

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
1604	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	261	36	1287	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
Yes	1095	184	32	1072	954	1076	844	1090	-	652	1074	256	99	202	790
68%	71%	89%	67%	69%	71%	69%	70%	68%	-%	73%	69%	72%	68%	84%	65%
	ac									b				ac	
No	509	76	4	488	392	491	357	502	2	244	493	102	46	38	425
32%	29%	11%	33%	31%	29%	31%	30%	32%	100%	27%	31%	28%	32%	16%	35%
	b		b							a			b		b

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

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
	Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
	a	b	c	a	b	a	b	a	b	a	b	a	b
1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
1095	158	71	857	1095	-	1064	31	681	86	287	780	275	6
68%	77%	69%	67%	100%	-%	71%	29%	66%	70%	73%	66%	73%	76%
	c			b		b				b			
509	47	33	424	-	509	433	76	357	36	108	394	101	2
32%	23%	31%	33%	-%	100%	29%	71%	34%	30%	27%	34%	27%	24%
			a		a		a			a			

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

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

Yes

No

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
1095	295	295	276	229
68%	75%	73%	67%	57%
	cd	d		
509	97	108	134	170
32%	25%	27%	33%	43%
			a	abc

QF5. Why have you not moved any mail to other communication methods in the last 12 months?

Base: All who have not moved some mail to other communication methods

Significance Level: 95%

Unweighted total

Weighted total

We have already moved everything that is possible to move

Happy with sending things by mail

We prefer to send things to customers by mail

No reason

Do not use computers / only one that uses a computer

No need - do not have a large volume of mail

There is no pressure from customers for us to move

Planning to do so in the future

No alternative media that would meet my needs

Need to send hard copies / keep hard copies of everything we send

Reliability / trust

Not considered this

Lack of information about products and costs by other providers

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
504	*a	b	*c	d	e	f	g	h	*i	j	k	l	m
509	21	39	25	45	30	58	40	30	28	63	71	54	316
	31	67	40	43	32	76	63	53	26	27	30	21	431
149	7	20	14	11	8	32	15	15	7	7	7	5	130
29%	23%	31%	36%	25%	26%	42%	23%	29%	27%	27%	23%	24%	30%
						kl							
118	7	25	4	9	7	15	11	15	3	8	7	8	95
23%	24%	37%	9%	20%	21%	19%	17%	29%	11%	30%	24%	38%	22%
		m										fgm	
59	-	13	2	3	4	5	11	7	5	4	3	2	50
12%	-%	20%	5%	7%	12%	7%	17%	13%	20%	15%	10%	8%	12%
54	7	4	9	9	4	7	4	4	-	1	3	2	48
11%	23%	6%	22%	j	12%	10%	6%	8%	-%	4%	9%	9%	11%
42	4	2	2	3	1	7	13	2	3	-	4	1	36
8%	12%	3%	4%	6%	5%	9%	20%	5%	10%	-%	14%	4%	8%
						j	bjlm				j		j
37	*	-	4	4	3	9	5	2	3	4	2	1	30
7%	*%	-%	9%	10%	8%	12%	8%	4%	10%	14%	8%	7%	7%
				b		b				bm			
20	-	2	-	1	1	-	11	-	1	1	1	1	17
4%	-%	4%	-%	3%	4%	-%	17%	-%	5%	4%	3%	5%	4%
							dthjkm						
13	-	*	-	3	1	*	2	-	5	1	-	-	12
2%	-%	*%	-%	6%	4%	*%	3%	-%	20%	4%	-%	-%	3%
				k									
12	-	4	-	*	-	2	2	2	1	-	*	*	12
2%	-%	6%	-%	*%	-%	2%	3%	5%	5%	-%	2%	1%	3%
		j											
12	2	-	2	1	-	-	2	*	1	1	1	1	9
2%	6%	-%	4%	3%	-%	-%	3%	1%	6%	4%	3%	4%	2%
11	2	2	-	1	-	2	4	-	-	-	*	*	11
2%	6%	3%	-%	3%	-%	2%	6%	-%	-%	-%	2%	1%	2%
10	-	2	*	-	1	2	-	2	1	-	1	-	9
2%	-%	3%	*%	-%	4%	3%	-%	4%	5%	-%	5%	-%	2%
7	-	-	2	-	-	-	2	2	-	-	-	1	6
1%	-%	-%	4%	-%	-%	-%	3%	4%	-%	-%	-%	4%	1%

Table 92 (continuation)

QF5. Why have you not moved any mail to other communication methods in the last 12 months?

Base: All who have not moved some mail to other communication methods

Significance Level: 95%

Unweighted total

Weighted total

Time or extra admin

required

Cost

The unreliability of

email address lists

Hassle of moving

Customers are unwilling

to give email addresses

Contracted with postal

provider / franking

machine

Other media ineffective

No particular reason

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
504	*a 21	b 39	*c 25	d 45	e 30	f 58	g 40	h 30	*i 28	j 63	k 71	l 54	m 316
509	31	67	40	43	32	76	63	53	26	27	30	21	431
4	-	-	2	*	-	-	-	-	1	-	*	-	3
1%	-%	-%	4%	*%	-%	-%	-%	-%	5%	-%	2%	-%	1%
4	-	2	-	1	-	-	*	-	-	-	-	-	4
1%	-%	3%	-%	3%	-%	-%	*%	-%	-%	-%	-%	-%	1%
3	-	2	-	-	1	-	-	-	-	-	-	-	3
1%	-%	3%	-%	-%	4%	-%	-%	-%	-%	-%	-%	-%	1%
2	-	-	-	*	-	-	-	-	*	2	-	-	1
*%	-%	-%	-%	*%	-%	-%	-%	-%	1%	7%	-%	-%	*%
										fkilm			
2	2	-	-	-	-	-	-	-	-	-	-	-	2
*%	6%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	*%
*	-	-	-	-	-	*	-	-	-	-	-	-	*
*%	-%	-%	-%	-%	-%	*%	-%	-%	-%	-%	-%	-%	*%
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
1	-	-	-	-	1	-	-	-	-	-	-	-	1
*%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	-%	-%	*%
					m								
15	4	*	4	-	1	2	*	-	1	2	*	-	12
3%	12%	*%	9%	-%	4%	2%	*%	-%	5%	7%	2%	-%	3%
										l			
8	-	2	2	-	-	-	*	-	*	*	3	*	4
2%	-%	3%	4%	-%	-%	-%	*%	-%	1%	2%	8%	2%	1%
											dfm		

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?

Base: All who have not moved some mail to other communication methods

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	504	398	62	15	13	16	106	361	143	469	35	334	84	34	52
Weighted total	509	491	11	3	2	2	18	379	130	489	20	365	81	27	36
We have already moved everything that is possible to move	149 29%	143 29%	4 40%	1 29%	- -%	1 31%	6 32%	129 34% b	20 15%	142 29%	7 36%	114 31% c	19 23%	3 12%	13 37% c
Happy with sending things by mail	118 23%	113 23%	3 25%	1 23%	1 51%	1 25%	5 28%	73 19%	45 34% a	114 23%	4 17%	69 19%	28 35% a	11 42% a	9 26%
We prefer to send things to customers by mail	59 12%	57 12%	1 6%	* 16%	1 36%	* 8%	2 12%	37 10%	22 17% a	59 12%	* 2%	35 10%	17 20% a	4 15%	3 8%
No reason	54 11%	52 11%	1 7%	* 10%	- -%	* 8%	1 7%	40 11%	13 10%	53 11%	* 2%	46 13% c	5 6%	* 1%	3 7%
Do not use computers / only one that uses a computer	42 8%	41 8%	1 5%	- -%	- -%	- -%	1 3%	31 8%	11 8%	40 8%	2 9%	34 9% d	6 7%	2 7%	- -%
No need - do not have a large volume of mail	37 7%	37 7%	* 3%	* 5%	- -%	* 8%	1 4%	25 7%	12 9%	34 7%	4 20% a	34 9% bd	1 1%	2 9% b	* 1%
There is no pressure from customers for us to move	20 4%	20 4%	* 2%	- -%	* 15%	* 8%	1 4%	15 4%	5 4%	20 4%	- -%	13 4%	5 6%	* %	2 6%
Planning to do so in the future	13 2%	12 2%	* 2%	* 12%	* 11%	- -%	1 4%	13 3% b	- -%	13 3%	- -%	9 2%	1 2%	1 3%	2 5%
No alternative media that would meet my needs	12 2%	12 2%	* 4%	* 7%	- -%	- -%	1 3%	8 2%	4 3%	12 3%	- -%	7 2%	- -%	* 1%	5 13% ab
Need to send hard copies / keep hard copies of everything we send	12 2%	11 2%	1 7% a	- -%	* 6%	- -%	1 5%	10 3%	2 1%	12 2%	* 1%	3 1%	5 7% a	1 3%	2 6% a
Reliability / trust	11 2%	11 2%	* 1%	- -%	- -%	- -%	* 1%	8 2%	4 3%	9 2%	2 10% a	6 2%	5 7% a	- -%	- -%
Not considered this	10 2%	10 2%	* 1%	* 5%	- -%	- -%	* 2%	10 3%	1 %	10 2%	- -%	6 2%	2 3%	2 7%	* %

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?

Base: All who have not moved some mail to other communication methods

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	*c	*d	*e	f	a	b	a	b	a	b	c	d
Unweighted total	504	398	62	15	13	16	106	361	143	469	35	334	84	34	52
Weighted total	509	491	11	3	2	2	18	379	130	489	20	365	81	27	36
Lack of information about products and costs by other providers	7	7	-	-	-	-	-	2	4	7	-	4	2	*	-
	1%	1%	-%	-%	-%	-%	-%	1%	3% a	1%	-%	1%	3%	2%	-%
Time or extra admin required	4	4	*	-	-	-	*	4	-	4	-	4	-	-	-
	1%	1%	2%	-%	-%	-%	1%	1%	-%	1%	-%	1%	-%	-%	-%
Cost	4	3	*	-	-	-	*	1	2	4	-	4	-	-	-
	1%	1%	1%	-%	-%	-%	1%	*%	2%	1%	-%	1%	-%	-%	-%
The unreliability of email address lists	3	3	-	-	-	-	-	3	-	3	-	-	2	-	1
	1%	1%	-%	-%	-%	-%	-%	1%	-%	1%	-%	-%	3% a	-%	4% a
Hassle of moving	2	2	1	-	-	-	1	2	*	2	-	2	*	-	-
	*%	*%	5% a	-%	-%	-%	3% a	1%	*%	1%	-%	1%	*%	-%	-%
Customers are unwilling to give email addresses	2	2	-	-	-	-	-	-	2	2	-	2	-	-	-
	*%	*%	-%	-%	-%	-%	-%	-%	1% a	*%	-%	*%	-%	-%	-%
Contracted with postal provider / franking machine	*	-	*	-	-	-	*	*	-	*	-	*	-	-	-
	*%	-%	1% a	-%	-%	-%	1%	*%	-%	*%	-%	*%	-%	-%	-%
Other media ineffective	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No particular reason	1	1	-	-	-	-	-	1	-	1	-	-	1	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	-%	*%	-%	-%	2% a	-%	-%
Other	15	14	*	-	*	*	1	10	5	14	*	10	3	-	2
	3%	3%	1%	-%	15%	6%	3%	3%	3%	3%	1%	3%	3%	-%	6%
Don't know	8	7	-	-	*	1	1	8	-	5	3	7	*	*	*
	2%	1%	-%	-%	18%	22%	5% a	2%	-%	1%	13% a	2%	1%	1%	*%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 92 (continuation)

QF5. Why have you not moved any mail to other communication methods in the last 12 months?

Base: All who have not moved some mail to other communication methods

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	504	234	78	70	60	33	20	9	428	29	19	13	15	83	31	56	58
Weighted total	509	259	86	74	57	20	5	9	447	27	13	13	9	83	28	56	54
We have already moved everything that is possible to move	149	87	15	21	19	6	1	-	128	13	*	8	1	20	11	12	19
	29%	34%	18%	28%	33%	30%	25%	-%	29%	46%	3%	59%	8%	24%	41%	21%	35%
Happy with sending things by mail	118	57	20	16	16	4	2	4	102	4	5	5	2	19	7	11	14
	23%	22%	23%	21%	28%	19%	31%	42%	23%	16%	37%	40%	23%	23%	24%	20%	26%
We prefer to send things to customers by mail	59	21	11	16	8	1	*	*	55	3	1	1	-	4	4	4	4
	12%	8%	13%	22%	14%	7%	10%	5%	12%	11%	4%	5%	-%	4%	14%	7%	7%
No reason	54	28	14	5	5	-	*	2	51	2	-	-	1	8	1	6	3
	11%	11%	16%	7%	9%	-%	4%	19%	11%	7%	-%	-%	9%	10%	4%	11%	5%
Do not use computers / only one that uses a computer	42	31	4	5	2	-	-	-	40	2	-	-	-	2	-	2	*
	8%	12%	4%	6%	4%	-%	-%	-%	9%	7%	-%	-%	-%	3%	-%	3%	1%
No need - do not have a large volume of mail	37	30	*	4	2	*	-	-	33	2	2	-	-	5	2	3	4
	7%	12%	1%	6%	3%	2%	-%	-%	7%	8%	14%	-%	-%	5%	6%	5%	7%
There is no pressure from customers for us to move	20	3	10	4	1	2	*	*	17	1	2	-	-	4	2	3	3
	4%	1%	12%	5%	1%	11%	6%	4%	4%	5%	16%	-%	-%	5%	8%	5%	6%
Planning to do so in the future	13	3	*	4	4	*	*	1	12	*	1	-	*	6	-	6	-
	2%	1%	1%	5%	6%	2%	5%	14%	3%	1%	4%	-%	2%	7%	-%	10%	-%
No alternative media that would meet my needs	12	2	3	2	-	3	*	2	10	-	-	-	3	2	2	*	4
	2%	1%	4%	3%	-%	15%	2%	21%	2%	-%	-%	-%	33%	2%	8%	1%	7%
Need to send hard copies / keep hard copies of everything we send	12	1	2	3	4	*	2	-	11	*	1	*	-	5	2	2	5
	2%	1%	2%	4%	7%	2%	35%	-%	2%	2%	4%	1%	-%	6%	6%	3%	9%
Reliability / trust	11	2	4	2	4	-	-	-	7	4	-	-	-	-	2	-	2
	2%	1%	5%	3%	6%	-%	-%	-%	2%	14%	-%	-%	-%	-%	8%	-%	4%
Not considered this	10	4	4	*	*	2	-	-	10	-	*	-	-	4	*	2	2
	2%	2%	4%	1%	1%	11%	-%	-%	2%	-%	1%	-%	-%	5%	2%	4%	4%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

	TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
		0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%		a	b	c	d	e	f	g	a	b	c	d	e	a	b	a	b
Unweighted total	504	234	78	70	60	33	20	9	428	29	19	13	15	83	31	56	58
Weighted total	509	259	86	74	57	20	5	9	447	27	13	13	9	83	28	56	54
Lack of information about products and costs by other providers	7 1%	6 2%	- -%	- -%	- -%	* 2%	- -%	- -%	5 1%	- -%	- -%	- -%	2 25%	2 3%	2 6%	2 4%	2 4%
Time or extra admin required	4 1%	* %	2 2%	1 2%	- -%	- -%	- -%	- -%	4 1%	- -%	- -%	- -%	- -%	2 2%	- -%	2 4%	- -%
Cost	4 1%	- -%	2 2%	1 2%	* %	- -%	- -%	- -%	4 1%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
The unreliability of email address lists	3 1%	- -%	2 2%	- -%	1 2%	- -%	- -%	- -%	2 %	- -%	1 10%	- -%	- -%	1 2%	- -%	1 2%	- -%
Hassle of moving	2 *%	1 1%	* *%	* 1%	- -%	* 1%	- -%	- -%	2 1%	- -%	- -%	- -%	- -%	* *%	- -%	* *%	* *%
Customers are unwilling to give email addresses	2 *%	2 1%	- -%	- -%	- -%	- -%	- -%	- -%	2 %	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Contracted with postal provider / franking machine	* *%	- -%	- -%	* *%	- -%	- -%	- -%	- -%	* *%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Other media ineffective	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
No particular reason	1 *%	- -%	- -%	- -%	1 2%	- -%	- -%	- -%	1 *%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
Other	15 3%	4 1%	5 6%	3 4%	* *%	- -%	- -%	2 24%	12 3%	- -%	2 17%	- -%	- -%	4 5%	1 3%	4 6%	1 2%
Don't know	8 2%	2 1%	1 1%	4 6%	* 1%	* 1%	* 2%	- -%	7 2%	* 1%	* 1%	- -%	- -%	* *%	- -%	* *%	* *%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	504	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	509	242	88	171	456	260	461	213	125	381	187	455	90	355	335
		257	73	179	462	243	469	206	99	383	178	463	71	353	338
We have already moved everything that is possible to move	149	91	15	43	135	81	137	62	29	107	61	132	32	110	97
	29%	35%	20%	24%	29%	33%	29%	30%	29%	28%	34%	29%	45%	31%	29%
		bc											b		
Happy with sending things by mail	118	45	19	53	109	67	113	57	23	95	40	109	16	86	77
	23%	18%	26%	30%	24%	28%	24%	28%	23%	25%	22%	23%	23%	24%	23%
				a											
We prefer to send things to customers by mail	59	26	10	24	57	32	57	27	11	51	19	55	4	48	40
	12%	10%	13%	13%	12%	13%	12%	13%	11%	13%	11%	12%	6%	13%	12%
No reason	54	35	6	12	47	17	48	19	9	29	10	49	3	38	27
	11%	14%	8%	7%	10%	7%	10%	9%	9%	8%	6%	10%	4%	11%	8%
		c										c			
Do not use computers / only one that uses a computer	42	11	12	19	40	9	40	11	1	33	8	40	2	27	31
	8%	4%	16%	11%	9%	4%	9%	5%	1%	9%	5%	9%	3%	8%	9%
			a	a	be		be		be			c			
No need - do not have a large volume of mail	37	25	2	10	30	9	30	11	3	25	12	30	3	20	22
	7%	10%	3%	6%	6%	4%	6%	6%	3%	7%	7%	6%	4%	6%	6%
		b													
There is no pressure from customers for us to move	20	11	6	4	19	8	19	6	2	20	6	19	3	12	16
	4%	4%	8%	2%	4%	3%	4%	3%	2%	5%	3%	4%	4%	3%	5%
			c												
Planning to do so in the future	13	5	2	5	11	10	11	6	5	11	8	11	3	8	10
	2%	2%	3%	3%	2%	4%	2%	3%	5%	3%	5%	2%	5%	2%	3%
No alternative media that would meet my needs	12	2	2	9	12	5	12	6	6	11	6	11	1	4	8
	2%	1%	2%	5%	3%	2%	3%	3%	6%	3%	3%	2%	1%	1%	2%
				a											
Need to send hard copies / keep hard copies of everything we send	12	4	5	3	12	11	12	7	3	12	4	12	3	10	10
	2%	1%	7%	1%	3%	4%	2%	3%	3%	3%	2%	3%	4%	3%	3%
			ac												
Reliability / trust	11	5	1	5	11	8	11	9	4	9	7	9	2	7	7
	2%	2%	1%	3%	2%	3%	2%	4%	4%	2%	4%	2%	3%	2%	2%
Not considered this	10	8	2	-	10	5	10	5	6	10	6	10	*	5	8
	2%	3%	3%	-%	2%	2%	2%	2%	6%	3%	4%	2%	*%	1%	2%
		c	c					ac							

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?

Base: All who have not moved some mail to other communication methods

Significance Level: 95%

Unweighted total

Weighted total

Lack of information
about products and costs
by other providers

Time or extra admin
required

Cost

The unreliability of
email address lists

Hassle of moving

Customers are unwilling
to give email addresses

Contracted with postal
provider / franking
machine

Other media ineffective

No particular reason

Other

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
504	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Unweighted total	242	88	171	456	260	461	213	125	381	187	455	90	355	335
Weighted total	257	73	179	462	243	469	206	99	383	178	463	71	353	338
Lack of information about products and costs by other providers	7	4	-	5	4	5	4	-	2	3	7	2	2	7
	1%	1%	-%	1%	2%	1%	2%	-%	1%	1%	1%	3%	1%	2%
Time or extra admin required	4	4	*	4	1	4	*	*	4	1	4	*	2	3
	1%	1%	-%	1%	-%	1%	-%	-%	1%	1%	1%	-%	1%	1%
Cost	4	1	-	4	4	4	*	1	1	1	4	1	4	1
	1%	1%	-%	1%	1%	1%	-%	1%	-%	1%	1%	2%	1%	-%
The unreliability of email address lists	3	-	-	3	3	3	1	3	3	2	3	-	3	3
	1%	-%	-%	1%	1%	1%	1%	3%	1%	1%	1%	-%	1%	1%
			a					acf						
Hassle of moving	2	1	1	2	1	2	1	*	2	*	2	*	1	2
	-%	1%	1%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	1%
Customers are unwilling to give email addresses	2	2	-	2	2	2	-	-	2	-	2	2	2	2
	-%	1%	-%	-%	1%	-%	-%	-%	-%	-%	-%	3%	1%	1%
												ab		
Contracted with postal provider / franking machine	*	-	*	*	*	*	-	*	*	*	*	-	*	*
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other media ineffective	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No particular reason	1	-	-	1	1	1	-	-	1	-	1	-	1	-
	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	15	7	3	14	8	14	6	2	12	4	14	3	10	11
	3%	3%	4%	3%	3%	3%	3%	2%	3%	2%	3%	5%	3%	3%
Don't know	8	2	4	7	2	7	1	1	2	1	7	1	4	4
	2%	1%	5%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%
			a											

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
504 509	a 73 76	*b 8 4	c 415 423	a 488 488	b 402 392	c 491 491	d 360 357	e 499 502	*f 1 2	a 250 244	b 492 493	c 121 102	a 52 46	b 35 38	c 417 425
149 29%	19 24%	- -%	130 31%	143 29%	120 31%	145 29%	101 28%	149 30%	- -%	86 35%	145 29%	41 40% b	15 32%	14 38%	120 28%
118 23%	19 25%	1 27%	93 22%	114 23%	95 24%	116 24%	87 24%	116 23%	- -%	49 20%	117 24%	19 18%	11 24% b	2 4%	105 25% b
59 12%	8 11%	- -%	49 12%	55 11%	46 12%	55 11%	47 13%	57 11%	- -%	36 15% c	55 11% c	4 4%	8 16% b	1 2%	51 12%
54 11%	2 3%	- -%	51 12% a	52 11%	32 8%	52 11%	37 10%	49 10%	2 100%	16 6%	52 10%	10 10%	2 5%	7 18%	45 11%
42 8%	13 17% c	2 44%	28 7%	42 9%	30 8%	42 8%	28 8%	42 8%	- -%	20 8%	42 8%	9 9%	- -%	2 5%	40 9% a
37 7%	6 7%	- -%	32 8%	32 7%	25 6%	32 7%	22 6%	37 7%	- -%	14 6%	33 7%	5 4%	2 5%	4 10%	31 7%
20 4%	4 5%	* 12%	16 4%	20 4%	15 4%	20 4%	12 3%	18 4%	- -%	9 4%	20 4%	1 1%	1 3%	* -%	19 4%
13 2%	* 1%	- -%	12 3%	13 3%	11 3%	13 3%	10 3%	13 3%	- -%	8 3%	13 3%	2 2%	* -%	3 8%	10 2%
12 2%	4 6%	- -%	8 2%	12 3%	10 3%	12 3%	10 3%	12 2%	- -%	6 3%	12 3%	* -%	2 5%	2 6%	8 2%
12 2%	5 7% c	* 12%	6 1%	12 2%	11 3%	12 2%	10 3%	12 2%	- -%	8 3%	12 2%	4 4%	1 2%	- -%	11 3%
11 2%	2 3%	- -%	9 2%	11 2%	11 3%	11 2%	11 3%	11 2%	- -%	8 3%	11 2%	4 4%	- -%	- -%	11 3%
10 2%	1 2%	* 12%	9 2%	10 2%	10 3%	10 2%	10 3%	10 2%	- -%	5 2%	10 2%	2 2%	- -%	- -%	10 2%
7 1%	2 2%	- -%	5 1%	7 1%	4 1%	7 1%	6 2%	7 1%	- -%	4 2%	7 1%	6 1%	2 5%	- -%	5 1%

ab c

 Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c
 Produced by OLR
 OFC1885
 Issue date: 03/07/13

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	504	73	8	415	488	402	491	360	499	1	250	492	121	52	35	417
Weighted total	509	76	4	423	488	392	491	357	502	2	244	493	102	46	38	425
Time or extra admin required	4 1%	- -%	- -%	4 1%	4 1%	4 1%	4 1%	3 1%	4 1%	- -%	3 1%	4 1%	2 2%	- -%	1 3%	2 1%
Cost	4 1%	* *%	- -%	3 1%	4 1%	4 1%	4 1%	4 1%	4 1%	- -%	1 1%	4 1%	1 1%	- -%	1 4%	2 *%
The unreliability of email address lists	3 1%	- -%	- -%	3 1%	3 1%	3 1%	3 1%	1 *%	3 1%	- -%	- -%	3 1%	- -%	2 5%	- -%	1 *%
Hassle of moving	2 *%	1 1%	- -%	2 *%	2 1%	2 1%	2 1%	2 *%	2 *%	- -%	1 *%	2 1%	* *%	- -%	- -%	2 1%
Customers are unwilling to give email addresses	2 *%	- -%	- -%	2 *%	2 *%	2 *%	2 *%	- -%	2 *%	- -%	- -%	2 *%	2 2%	- -%	- -%	2 *%
Contracted with postal provider / franking machine	* *%	- -%	- -%	* *%	* *%	* *%	* *%	* *%	* *%	- -%	* *%	* *%	- -%	- -%	- -%	* *%
Other media ineffective	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%	- -%
No particular reason	1 *%	- -%	- -%	1 *%	1 *%	1 *%	1 *%	1 *%	1 *%	- -%	1 1%	1 *%	- -%	- -%	- -%	1 *%
Other	15 3%	4 5%	- -%	10 2%	15 3%	11 3%	15 3%	10 3%	15 3%	- -%	7 3%	13 3%	3 3%	4 8%	4 11%	7 2%
Don't know	8 2%	1 1%	* 5%	6 1%	8 2%	5 1%	8 2%	6 2%	8 2%	- -%	4 2%	8 2%	1 1%	* *%	* *%	7 2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	*a	b	a	b	a	*b	a	b	a	*b
Unweighted total	504	49	29	420	-	504	426	78	362	28	100	394	107	3
Weighted total	509	47	33	424	-	509	433	76	357	36	108	394	101	2
We have already moved everything that is possible to move	149 29%	13 28%	13 41%	122 29%	- -%	149 29%	144 33% b	5 6%	102 28%	17 46%	37 35%	111 28%	25 25%	- -%
Happy with sending things by mail	118 23%	9 19%	5 16%	104 24%	- -%	118 23%	101 23%	17 22%	96 27%	3 8%	15 14%	99 25% a	29 28%	- -%
We prefer to send things to customers by mail	59 12%	6 12%	2 7%	51 12%	- -%	59 12%	51 12%	7 10%	43 12%	4 11%	13 12%	44 11%	9 9%	- -%
No reason	54 11%	2 4%	* %	50 12%	- -%	54 11%	44 10%	10 13%	25 7%	5 14%	6 5%	47 12%	6 6%	- -%
Do not use computers / only one that uses a computer	42 8%	2 4%	2 6%	38 9%	- -%	42 8%	17 4%	25 33% a	26 7%	2 5%	10 9%	32 8%	2 2%	- -%
No need - do not have a large volume of mail	37 7%	* %	- -%	37 9% a	- -%	37 7%	24 6%	13 17% a	29 8%	2 6%	7 6%	30 8%	6 6%	- -%
There is no pressure from customers for us to move	20 4%	2 4%	2 5%	17 4%	- -%	20 4%	20 5%	- -%	13 4%	* 1%	9 9% b	11 3%	6 6%	- -%
Planning to do so in the future	13 2%	2 5%	2 5%	8 2%	- -%	13 2%	13 3%	- -%	6 2%	4 12%	5 5%	8 2%	6 6%	- -%
No alternative media that would meet my needs	12 2%	4 8% c	2 7%	6 1%	- -%	12 2%	11 2%	2 2%	10 3%	- -%	3 3%	9 2%	4 4%	* 10%
Need to send hard copies / keep hard copies of everything we send	12 2%	5 11% c	* 1%	6 1%	- -%	12 2%	12 3%	- -%	7 2%	2 5%	3 3%	8 2%	5 5%	1 66%
Reliability / trust	11 2%	4 8% c	- -%	7 2%	- -%	11 2%	11 3%	- -%	8 2%	2 5%	2 2%	9 2%	2 2%	- -%
Not considered this	10 2%	- -%	2 6%	9 2%	- -%	10 2%	10 2%	- -%	10 3%	* 1%	1 1%	10 2%	5 5%	- -%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

Ofcom: Business Postal Tracker

Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	*b	c	*a	b	a	b	a	*b	a	b	a	*b
Unweighted total	504	49	29	420	-	504	426	78	362	28	100	394	107	3
Weighted total	509	47	33	424	-	509	433	76	357	36	108	394	101	2
Lack of information about products and costs by other providers	7	-	4	3	-	7	6	*	4	*	4	2	4	-
	1%	-%	12%	1%	-%	1%	1%	1%	1%	1%	4%	1%	4%	-%
Time or extra admin required	4	-	*	4	-	4	4	-	4	-	2	2	*	-
	1%	-%	1%	1%	-%	1%	1%	-%	1%	-%	2%	*%	*%	-%
Cost	4	-	-	4	-	4	4	-	*	2	2	1	-	-
	1%	-%	-%	1%	-%	1%	1%	-%	*%	6%	2%	*%	-%	-%
The unreliability of email address lists	3	1	-	2	-	3	3	-	2	-	-	3	1	-
	1%	3%	-%	*%	-%	1%	1%	-%	1%	-%	-%	1%	1%	-%
Hassle of moving	2	-	*	2	-	2	2	*	2	-	*	2	*	-
	*%	-%	1%	1%	-%	*%	*%	1%	1%	-%	*%	1%	*%	-%
Customers are unwilling to give email addresses	2	-	-	2	-	2	2	-	2	-	-	2	-	-
	*%	-%	-%	*%	-%	*%	*%	-%	1%	-%	-%	*%	-%	-%
Contracted with postal provider / franking machine	*	-	*	-	-	*	*	-	*	-	-	*	-	-
	*%	-%	*%	-%	-%	*%	*%	-%	*%	-%	-%	*%	-%	-%
Other media ineffective	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
No particular reason	1	-	-	1	-	1	1	-	1	-	-	1	-	-
	*%	-%	-%	*%	-%	*%	*%	-%	*%	-%	-%	*%	-%	-%
Other	15	4	*	10	-	15	14	*	12	1	5	9	4	*
	3%	9%	1%	2%	-%	3%	3%	1%	3%	2%	4%	2%	4%	24%
	c													
Don't know	8	2	*	3	-	8	4	4	7	-	3	4	1	-
	2%	4%	1%	1%	-%	2%	1%	5%	2%	-%	3%	1%	1%	-%
	c						a							

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 92 (continuation)

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QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	504	103	109	126	166
Weighted total	509	97	108	134	170
We have already moved everything that is possible to move	149 29%	10 10%	25 23% a	42 32% a	72 42% ab
Happy with sending things by mail	118 23%	35 36% bcd	24 23%	28 21%	31 18%
We prefer to send things to customers by mail	59 12%	16 16%	9 9%	18 14%	16 9%
No reason	54 11%	12 13%	10 9%	14 10%	18 10%
Do not use computers / only one that uses a computer	42 8%	4 4%	10 9%	16 12% a	11 7%
No need - do not have a large volume of mail	37 7%	15 15% bcd	5 5%	7 5%	11 6%
There is no pressure from customers for us to move	20 4%	8 8% c	5 4%	2 2%	6 3%
Planning to do so in the future	13 2%	6 6% cd	5 5% d	1 1%	1 *%
No alternative media that would meet my needs	12 2%	2 2%	7 7% cd	1 1%	2 1%
Need to send hard copies / keep hard copies of everything we send	12 2%	2 2%	4 4%	3 2%	3 2%
Reliability / trust	11 2%	6 6% cd	4 3% c	- -%	2 1%
Not considered this	10 2%	2 2%	2 2%	4 3%	2 1%
Lack of information about products and costs by other providers	7 1%	- -%	2 2%	3 2%	2 1%

Columns Tested: a,b,c,d

Ofcom: Business Postal Tracker

Table 92 (continuation)

Page 763

QF5. Why have you not moved any mail to other communication methods in the last 12 months?
Base: All who have not moved some mail to other communication methods

Significance Level: 95%

Unweighted total

Weighted total

 Time or extra admin
required

Cost

 The unreliability of
email address lists

Hassle of moving

 Customers are unwilling
to give email addresses

 Contracted with postal
provider / franking
machine

Other media ineffective

No particular reason

Other

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
504	103	109	126	166
509	97	108	134	170
4	*	3	*	-
1%	*%	3%	*%	-%
		d		
4	1	-	-	2
1%	1%	-%	-%	1%
3	-	3	-	-
1%	-%	3%	-%	-%
		cd		
2	1	1	-	*
*%	1%	1%	-%	*%
2	-	-	2	-
*%	-%	-%	1%	-%
*	-	-	-	*
*%	-%	-%	-%	*%
-	-	-	-	-
-%	-%	-%	-%	-%
1	-	1	-	-
*%	-%	1%	-%	-%
15	5	3	*	7
3%	5%	2%	*%	4%
	c			c
8	1	1	3	3
2%	1%	1%	2%	2%

Produced by OLR

OFC1885

Issue date: 03/07/13

QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

Significance Level: 95%

Unweighted total

Weighted total

Cost saving

Quicker

Customer preferences

Convenience / ease of use

Price of postage

Proof of delivery / know it has got there / reliable

Everyone else is doing it / client's like this method

Speed - instantaneous / fast response

Environmental reasons

Unreliable postal service

Good for sending invoices / attachments

Reduce admin time spent on alternative media

Offers more creative choices

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1100 1095	a 45 64	b 67 110	c 53 72	d 74 74	e 84 83	f 147 202	g 91 125	h 87 156	i 59 62	j 151 60	k 122 45	l 120 42	m 707 948
	516 47%	32 51%	58 53%	33 46%	34 46%	43 51%	94 47%	54 43%	79 51%	28 46%	28 46%	13 30%	19 46%
498 45%	20 31%	36 32%	35 49%	29 39%	39 46%	104 51%	70 56%	71 46%	26 41%	26 44%	24 53%	19 45%	429 45%
						ab	abd				ab		b
248 23%	11 18%	30 28%	18 25%	22 30%	22 26%	42 21%	20 16%	40 26%	10 16%	18 30%	7 17%	9 21%	215 23%
				gk						gik			
171 16%	13 20%	18 16%	15 21%	12 17%	7 8%	33 16%	20 16%	26 17%	7 11%	7 12%	9 20%	4 10%	151 16%
			e								el		
73 7%	7 11%	5 4%	4 5%	3 4%	10 12%	16 8%	6 5%	11 7%	4 7%	3 6%	2 4%	2 4%	66 7%
					kl								
71 6%	- -%	9 8%	8 11%	4 6%	7 8%	18 9%	11 9%	6 4%	3 4%	1 2%	2 4%	1 3%	67 7%
		aj	ajl		j	ajl	aj						j
55 5%	2 3%	9 8%	4 5%	3 4%	4 5%	10 5%	6 4%	5 3%	4 7%	5 8%	3 7%	3 6%	45 5%
55 5%	4 6%	5 4%	2 2%	8 11%	4 5%	14 7%	2 1%	9 6%	4 7%	1 2%	2 5%	1 1%	51 5%
				gil		gil							j
34 3%	2 3%	5 4%	2 2%	2 3%	3 3%	6 3%	2 2%	3 2%	4 7%	4 6%	2 3%	1 3%	28 3%
29 3%	6 9%	2 2%	4 5%	* %	3 3%	6 3%	6 4%	- -%	1 2%	1 2%	* %	1 2%	27 3%
	dhjkm		hk				hk						
25 2%	4 6%	7 6%	* %	3 4%	* %	4 2%	4 3%	* %	1 2%	1 1%	1 2%	1 1%	23 2%
	eh	ehj											
19 2%	4 6%	5 4%	* %	1 2%	- -%	2 1%	2 1%	- -%	1 2%	2 4%	1 2%	1 3%	15 2%
	ehm												
19 2%	2 3%	2 2%	- -%	3 4%	3 3%	5 3%	2 2%	- -%	- -%	1 2%	* %	1 2%	17 2%

QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

Significance Level: 95%
Unweighted total
Weighted total
Increase in postal
prices

More efficient

For BACS transfers

Royal Mail strike action

Company budget has been
diverted to other media

Other

Don't know

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1100	a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	45	67	53	74	84	147	91	87	59	151	122	120	707
Weighted total	64	110	72	74	83	202	125	156	62	60	45	42	948
18	6	-	-	*	3	4	4	-	1	-	*	1	17
2%	9%	-%	-%	*%	3%	2%	3%	-%	2%	-%	1%	2%	2%
	bcdthjk m				j		j						
8	-	*	4	*	-	2	2	-	*	*	-	-	8
1%	-%	*%	5%	*%	-%	1%	1%	-%	*%	*%	-%	-%	1%
			ehjklm										
5	2	-	-	-	-	-	2	-	1	-	*	-	5
*%	3%	-%	-%	-%	-%	-%	1%	-%	2%	-%	*%	-%	1%
	fj												
4	-	2	-	-	-	-	-	2	-	-	-	-	4
*%	-%	2%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	*%
1	-	-	-	-	*	-	-	-	-	*	*	*	*
*%	-%	-%	-%	-%	*%	-%	-%	-%	-%	*%	1%	*%	*%
											m		
35	4	2	*	3	3	7	5	2	3	2	3	2	29
3%	6%	2%	1%	4%	3%	4%	4%	1%	4%	3%	7%	5%	3%
											m		
5	-	-	-	-	-	4	*	-	1	-	-	-	5
*%	-%	-%	-%	-%	-%	2%	*%	-%	2%	-%	-%	-%	1%

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Table 93 (continuation)

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QF6. Why have you moved mail to other communication methods in the last 12 months?
Base: All who have moved some mail to other communication methods

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	*d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1100	812	182	40	29	37	288	737	363	1009	91	682	227	93	98
Weighted total	1095	1049	28	7	5	6	46	762	333	1056	39	748	210	78	59
Cost saving	516	495	13	4	2	2	21	371	145	497	19	352	92	38	34
	47%	47%	46%	53%	45%	41%	46%	49%	44%	47%	49%	47%	44%	48%	58%
Quicker	498	477	12	4	2	2	20	340	158	480	17	338	97	36	26
	45%	46%	43%	53%	39%	41%	44%	45%	47%	45%	45%	45%	46%	46%	44%
Customer preferences	248	239	6	1	1	1	9	188	61	238	10	177	52	16	3
	23%	23%	22%	17%	21%	12%	20%	25%	18%	23%	27%	24%	25%	21%	6%
								b				d	d	d	
Convenience / ease of use	171	165	4	1	*	1	6	121	50	168	3	109	39	17	6
	16%	16%	15%	12%	8%	17%	14%	16%	15%	16%	8%	15%	19%	21%	10%
										b			d		
Price of postage	73	70	2	*	1	-	3	45	27	72	1	50	12	7	3
	7%	7%	6%	2%	13%	-%	5%	6%	8%	7%	3%	7%	6%	9%	5%
Proof of delivery / know it has got there / reliable	71	67	2	1	*	1	4	54	17	67	4	44	16	6	4
	6%	6%	8%	14%	4%	10%	9%	7%	5%	6%	10%	6%	8%	8%	7%
Everyone else is doing it / client's like this method	55	52	2	*	1	-	3	37	18	54	1	41	8	4	1
	5%	5%	6%	5%	15%	-%	6%	5%	5%	5%	2%	6%	4%	6%	2%
Speed - instantaneous / fast response	55	53	1	*	-	*	2	34	20	54	*	40	8	5	1
	5%	5%	4%	5%	-%	2%	3%	5%	6%	5%	1%	5%	4%	7%	2%
Environmental reasons	34	31	2	*	*	*	3	24	10	31	3	28	4	1	1
	3%	3%	8%	6%	4%	7%	7%	3%	3%	3%	7%	4%	2%	1%	2%
			a				a								
Unreliable postal service	29	28	*	*	-	-	1	23	5	29	-	19	4	2	4
	3%	3%	1%	7%	-%	-%	2%	3%	2%	3%	-%	3%	2%	2%	6%
				b											ab
Good for sending invoices / attachments	25	23	1	*	1	*	2	13	12	25	*	17	3	2	2
	2%	2%	4%	2%	12%	2%	4%	2%	4%	2%	1%	2%	2%	3%	3%
							a		a						
Reduce admin time spent on alternative media	19	18	*	-	*	*	1	16	4	19	*	14	4	1	*
	2%	2%	2%	-%	2%	8%	2%	2%	1%	2%	1%	2%	2%	2%	1%
						abf									
Offers more creative choices	19	18	1	-	*	*	1	15	4	18	1	11	5	1	2
	2%	2%	2%	-%	4%	7%	3%	2%	1%	2%	2%	1%	2%	2%	3%
						a									
Increase in postal prices	18	18	*	*	-	-	1	11	7	18	-	16	1	-	1
	2%	2%	1%	3%	-%	-%	1%	1%	2%	2%	-%	2%	1%	-%	1%

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

	TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
		0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
Significance Level: 95%		a	b	c	*d	e	f	a	b	a	b	a	b	c	d
Unweighted total	1100	812	182	40	29	37	288	737	363	1009	91	682	227	93	98
Weighted total	1095	1049	28	7	5	6	46	762	333	1056	39	748	210	78	59
More efficient	8	7	1	*	-	-	1	6	2	8	-	4	2	-	2
	1%	1%	2%	3%	-%	-%	2%	1%	1%	1%	-%	*%	1%	-%	4%
															a
For BACS transfers	5	5	*	-	-	-	*	4	1	5	-	5	-	-	-
	*%	*%	*%	-%	-%	-%	*%	*%	*%	*%	-%	1%	-%	-%	-%
Royal Mail strike action	4	4	-	-	-	-	-	2	2	4	-	4	-	-	-
	*%	*%	-%	-%	-%	-%	-%	*%	1%	*%	-%	1%	-%	-%	-%
Company budget has been diverted to other media	1	*	-	-	*	*	*	*	*	1	*	*	1	-	*
	*%	*%	-%	-%	4%	4%	1%	*%	*%	*%	1%	*%	*%	-%	*%
					ab		a								
Other	35	34	1	*	-	*	1	27	8	35	1	28	4	3	*
	3%	3%	3%	2%	-%	4%	2%	4%	2%	3%	2%	4%	2%	3%	*%
Don't know	5	5	*	-	-	-	*	3	2	3	2	3	*	-	2
	*%	*%	1%	-%	-%	-%	1%	*%	1%	*%	5%	*%	*%	-%	3%
										a					ab

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

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Table 93 (continuation)

QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
1100 1095 516 47%	a 386 460	b 228 226	c 150 165	d 187 161	e 87 58	f 58 24	g 4 *	a 936 966	b 65 48	c 35 30	d 38 30	e 26 21	a 208 191	b 85 95	a 141 123	b 153 162
	214 47%	101 45%	71 43%	84 52%	31 53%	14 60%	*	446 46%	22 46%	16 54%	21 69%	11 52%	101 53%	54 57%	68 55%	87 54%
	bc							ab								
498 45%	217 47%	96 42%	77 47%	71 44%	27 47%	9 39%	- -%	440 46%	24 51%	11 37%	8 28%	14 66%	73 38%	41 43%	53 43%	61 38%
	d							d								
248 23%	93 20%	64 28%	45 27%	33 21%	10 17%	3 13%	* 23%	234 24%	7 15%	3 9%	2 7%	2 11%	30 16%	19 20%	23 19%	26 16%
	aef							cd								
171 16% 73 7%	77 17%	39 17%	20 12%	23 14%	10 16%	3 13%	* 23%	154 16%	5 10%	4 12%	4 13%	4 21%	34 18%	16 17%	19 15%	32 20%
	29 6%	12 5%	14 8%	12 8%	5 8%	1 3%	- -%	63 7%	1 2%	6 20%	2 7%	* 1%	10 5%	8 9%	6 5%	12 7%
								ab								
71 6%	25 6%	18 8%	11 6%	12 7%	4 6%	1 5%	* 23%	61 6%	6 13%	2 7%	* %	2 9%	15 8%	10 10%	12 10%	13 8%
								ad								
55 5%	25 6%	14 6%	5 3%	7 5%	3 4%	1 3%	* 23%	48 5%	3 7%	3 10%	* %	1 4%	6 3%	5 6%	5 4%	6 3%
55 5%	21 5%	9 4%	8 5%	12 8%	4 7%	- -%	- -%	44 5%	7 14%	1 4%	2 8%	* 2%	9 5%	* %	7 5%	2 1%
								a								
34 3%	15 3%	8 3%	3 2%	5 3%	2 4%	1 2%	- -%	29 3%	2 3%	3 9%	* 1%	1 3%	10 5%	2 2%	8 6%	4 3%
29 3%	10 2%	7 3%	8 5%	2 1%	2 3%	- -%	- -%	22 2%	- -%	5 16%	2 6%	* 1%	4 2%	2 2%	2 2%	4 2%
								ab					b			
25 2%	13 3%	* %	4 2%	4 2%	2 4%	1 4%	- -%	21 2%	2 4%	1 2%	- -%	2 9%	5 3%	2 2%	4 3%	3 2%
19 2%	11 2%	3 1%	1 1%	3 2%	1 2%	* 1%	- -%	18 2%	2 4%	- -%	* %	- -%	4 2%	4 4%	3 2%	5 3%
19 2%	8 2%	2 1%	2 1%	4 2%	2 3%	* 1%	- -%	17 2%	- -%	- -%	* 1%	1 6%	3 2%	- -%	* %	3 2%
18 2%	7 2%	6 2%	4 2%	2 1%	- -%	* 1%	- -%	16 2%	- -%	2 7%	- -%	- -%	5 2%	2 2%	4 3%	3 2%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b
Produced by OLR
OFC1885
Issue date: 03/07/13

ab

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QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%																
Unweighted total	1100	a	b	c	d	e	f	a	b	c	d	e	a	b	a	b
Weighted total	1095	386	228	150	187	87	58	936	65	35	38	26	208	85	141	153
More efficient	8	460	226	165	161	58	24	966	48	30	30	21	191	95	123	162
	1%	4	2	-	2	-	*	6	2	-	*	-	2	2	2	2
		1%	1%	-%	1%	-%	1%	1%	4%	-%	1%	-%	1%	2%	2%	1%
For BACS transfers	5	3	2	-	-	-	-	5	-	-	-	-	1	-	1	-
	*%	1%	1%	-%	-%	-%	-%	1%	-%	-%	-%	-%	1%	-%	1%	-%
Royal Mail strike action	4	2	-	2	-	-	-	4	-	-	-	-	2	-	-	2
	*%	*%	-	1%	-%	-%	-%	*%	-%	-%	-%	-%	1%	-%	-%	1%
Company budget has been diverted to other media	1	-	*	*	*	-	*	1	-	-	*	-	*	-	*	*
	*%	-%	*%	*%	*%	-%	1%	*%	-%	-%	1%	-%	*%	-%	*%	*%
Other	35	17	9	3	6	*	*	35	*	*	-	-	5	2	3	4
	3%	4%	4%	2%	4%	*%	1%	4%	1%	*%	-%	-%	3%	3%	3%	2%
Don't know	5	-	2	2	1	-	*	3	*	2	-	*	4	-	*	4
	*%	-	1%	1%	1%	-	1%	*%	*%	6%	-%	1%	2%	-%	*%	2%

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

Ofcom: Business Postal Tracker

Table 93 (continuation)

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QF6. Why have you moved mail to other communication methods in the last 12 months?
Base: All who have moved some mail to other communication methods

	TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
		Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
Significance Level: 95%															
Unweighted total	1100	a	b	c	a	b	c	d	e	f	a	b	c	a	b
Weighted total	1095	535	210	345	1028	698	1045	553	328	882	514	1034	207	853	772
		555	209	319	1016	661	1034	524	281	885	491	1018	163	841	738
Cost saving	516	276	109	125	475	300	484	254	131	411	240	477	95	378	375
	47%	50%	52%	39%	47%	45%	47%	49%	47%	46%	49%	47%	58%	45%	51%
		c	c									ab		a	
Quicker	498	259	87	146	461	320	472	235	116	405	236	457	79	397	307
	45%	47%	42%	46%	45%	48%	46%	45%	41%	46%	48%	45%	49%	47%	42%
						e								b	
Customer preferences	248	124	39	83	232	150	236	115	61	208	100	234	28	196	174
	23%	22%	19%	26%	23%	23%	23%	22%	22%	23%	20%	23%	17%	23%	24%
				b											
Convenience / ease of use	171	90	32	48	165	107	165	84	43	142	90	163	28	142	114
	16%	16%	15%	15%	16%	16%	16%	16%	15%	16%	18%	16%	17%	17%	16%
Price of postage	73	43	10	18	65	39	67	29	18	61	32	63	8	49	53
	7%	8%	5%	6%	6%	6%	6%	6%	7%	7%	7%	6%	5%	6%	7%
Proof of delivery / know it has got there / reliable	71	39	16	16	70	42	70	46	26	60	37	67	13	60	42
	6%	7%	8%	5%	7%	6%	7%	9%	9%	7%	8%	7%	8%	7%	6%
Everyone else is doing it / client's like this method	55	30	8	17	54	41	54	24	17	44	21	54	10	41	40
	5%	5%	4%	5%	5%	6%	5%	5%	6%	5%	4%	5%	6%	5%	5%
Speed - instantaneous / fast response	55	31	9	13	54	34	54	22	22	48	17	53	6	45	41
	5%	6%	4%	4%	5%	5%	5%	4%	8%	5%	3%	5%	4%	5%	6%
									d						
Environmental reasons	34	18	10	6	33	21	34	17	10	26	16	32	6	31	22
	3%	3%	5%	2%	3%	3%	3%	3%	4%	3%	3%	3%	4%	4%	3%
			c												
Unreliable postal service	29	15	6	8	27	16	27	13	9	25	12	25	3	17	22
	3%	3%	3%	2%	3%	2%	3%	2%	3%	3%	3%	3%	2%	2%	3%
Good for sending invoices / attachments	25	11	4	10	25	17	25	12	16	23	10	25	4	23	20
	2%	2%	2%	3%	2%	3%	2%	2%	6%	3%	2%	2%	2%	3%	3%
								abcd							
Reduce admin time spent on alternative media	19	5	8	6	12	9	12	12	3	13	11	14	3	13	10
	2%	1%	4%	2%	1%	1%	1%	2%	1%	1%	2%	1%	2%	2%	1%
			a												
Offers more creative choices	19	10	3	7	17	16	17	8	5	15	10	17	5	15	16
	2%	2%	1%	2%	2%	2%	2%	2%	2%	2%	2%	2%	3%	2%	2%
Increase in postal prices	18	9	2	7	17	10	17	9	2	13	6	17	1	13	13
	2%	2%	1%	2%	2%	2%	2%	2%	1%	2%	1%	2%	1%	2%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

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Table 93 (continuation)

Page 771

QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

Significance Level: 95%

Unweighted total

Weighted total

More efficient

For BACS transfers

Royal Mail strike action

Company budget has been
diverted to other media

Other

Don't know

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1100	535	210	345	1028	698	1045	553	328	882	514	1034	207	853	772
1095	555	209	319	1016	661	1034	524	281	885	491	1018	163	841	738
8	6	2	*	6	4	8	4	*	6	4	6	2	4	4
1%	1%	1%	*%	1%	1%	1%	1%	*%	1%	1%	1%	1%	*%	1%
5	5	*	-	3	1	3	-	-	5	*	3	-	3	3
*%	1%	*%	-%	*%	*%	*%	-%	-%	1%	*%	*%	-%	*%	*%
4	2	-	2	2	2	2	4	-	2	-	4	-	-	4
*%	*%	-%	1%	*%	*%	*%	1%	-%	*%	-%	*%	-%	-%	1%
														a
1	*	-	1	1	1	1	1	*	*	1	1	*	1	1
*%	*%	-%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%	*%
35	17	7	12	35	18	35	10	5	30	15	34	6	29	20
3%	3%	3%	4%	3%	3%	3%	2%	2%	3%	3%	3%	4%	3%	3%
5	1	*	4	5	5	5	4	2	5	3	5	2	5	2
*%	*%	*%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	*%

Ofcom: Business Postal Tracker

Table 93 (continuation)

Page 772

QF6. Why have you moved mail to other communication methods in the last 12 months?
Base: All who have moved some mail to other communication methods

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%		a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Unweighted total	1100	203	27	854	1083	974	1086	866	1096	-	674	1080	287	106	207	784
Weighted total	1095	184	32	864	1072	954	1076	844	1090	-	652	1074	256	99	202	790
Cost saving	516	118	16	374	502	452	504	399	514	-	311	504	139	43	131	339
	47%	64% c	51%	43%	47%	47%	47%	47%	47%	-%	48%	47%	54% b	44%	65% ac	43%
Quicker	498	70	11	406	488	434	488	389	497	-	291	488	126	46	63	389
	45%	38%	36%	47% a	46%	46%	45%	46%	46%	-%	45%	45%	49%	46% b	31% b	49% b
Customer preferences	248	32	11	208	240	215	242	197	248	-	155	243	59	21	38	189
	23%	17%	33%	24% a	22%	23%	22%	23%	23%	-%	24%	23%	23%	21%	19%	24%
Convenience / ease of use	171	25	7	139	171	157	171	133	171	-	114	169	46	27	19	125
	16%	13%	22%	16%	16%	16%	16%	16%	16%	-%	18%	16%	18%	27% bc	9%	16% b
Price of postage	73	19	2	53	71	65	71	57	73	-	41	73	9	1	22	50
	7%	10% c	7%	6%	7%	7%	7%	7%	7%	-%	6%	7% c	3%	1%	11% ac	6% a
Proof of delivery / know it has got there / reliable	71	15	3	52	67	62	67	56	71	-	40	66	18	6	19	46
	6%	8%	9%	6%	6%	7%	6%	7%	7%	-%	6%	6%	7%	6%	10% c	6%
Everyone else is doing it / client's like this method	55	4	1	47	54	47	55	35	55	-	30	55	9	7	6	41
	5%	2%	4%	5%	5%	5%	5%	4%	5%	-%	5%	5%	4%	7%	3%	5%
Speed - instantaneous / fast response	55	13	1	39	49	48	50	46	55	-	42	52	16	6	6	43
	5%	7%	4%	4%	5%	5%	5%	5%	5%	-%	6%	5%	6%	6%	3%	5%
Environmental reasons	34	4	3	28	34	31	34	30	34	-	24	34	7	3	8	23
	3%	2%	11%	3%	3%	3%	3%	4%	3%	-%	4%	3%	3%	3%	4%	3%
Unreliable postal service	29	10	*	17	27	25	27	27	29	-	19	27	5	-	10	19
	3%	5% c	*%	2%	2%	3%	2%	3%	3%	-%	3%	2%	2%	-%	5% a	2%
Good for sending invoices / attachments	25	6	2	19	23	21	23	21	25	-	21	25	3	1	3	21
	2%	3%	6%	2%	2%	2%	2%	3%	2%	-%	3%	2%	1%	1%	1%	3%
Reduce admin time spent on alternative media	19	1	-	18	16	17	18	14	19	-	10	18	9	10	2	7
	2%	*%	-%	2%	1%	2%	2%	2%	2%	-%	1%	2%	3%	10% bc	1%	1%
Offers more creative choices	19	1	-	18	19	18	19	15	19	-	11	19	5	2	1	16
	2%	*%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	2%	2%	1%	2%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Table 93 (continuation)

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QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

	TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
		Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%																
Unweighted total	1100	a	*b	c	a	b	c	d	e	*f	a	b	c	a	b	c
Weighted total	1095	203	27	854	1083	974	1086	866	1096	-	674	1080	287	106	207	784
		184	32	864	1072	954	1076	844	1090	-	652	1074	256	99	202	790
Increase in postal prices	18	5	-	14	17	17	17	15	18	-	11	18	1	*	4	14
	2%	2%	-%	2%	2%	2%	2%	2%	2%	-%	2%	2%	1%	*%	2%	2%
More efficient	8	-	-	8	8	6	8	4	8	-	4	8	4	4	*	4
	7%	-%	-%	7%	7%	7%	7%	*%	7%	-%	7%	7%	2%	4%	*%	7%
														bc		
For BACS transfers	5	2	-	3	5	3	5	3	5	-	1	5	-	*	2	3
	*%	7%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	-%	*%	7%	*%
Royal Mail strike action	4	-	-	4	2	2	2	4	2	-	2	4	-	-	-	4
	*%	-%	-%	*%	*%	*%	*%	7%	*%	-%	*%	*%	-%	-%	-%	7%
Company budget has been diverted to other media	1	-	-	1	1	1	1	1	1	-	1	1	1	-	-	1
	*%	-%	-%	*%	*%	*%	*%	*%	*%	-%	*%	*%	*%	-%	-%	*%
Other	35	5	5	26	35	30	35	28	35	-	27	35	11	3	11	21
	3%	3%	16%	3%	3%	3%	3%	3%	3%	-%	4%	3%	4%	3%	6%	3%
															c	
Don't know	5	-	-	5	5	5	5	5	5	-	3	5	*	-	2	3
	*%	-%	-%	7%	*%	7%	*%	7%	*%	-%	7%	*%	*%	-%	7%	*%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

Ofcom: Business Postal Tracker

Table 93 (continuation)

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QF6. Why have you moved mail to other communication methods in the last 12 months?
Base: All who have moved some mail to other communication methods

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	*b	a	*b	a	b	a	b	a	*b
Unweighted total	1100	140	72	874	1100	-	1071	29	700	92	289	783	280	7
Weighted total	1095	158	71	857	1095	-	1064	31	681	86	287	780	275	6
Cost saving	516	74	40	400	516	-	510	5	298	46	160	341	152	1
	47%	46%	56%	47%	47%	-%	48%	18%	44%	54%	56% b	44%	55%	10%
Quicker	498	75	30	391	498	-	490	8	303	43	129	354	112	4
	45%	47%	43%	46%	45%	-%	46%	25%	45%	49%	45%	45%	41%	69%
Customer preferences	248	20	14	215	248	-	235	13	182	11	44	202	45	-
	23%	12%	19%	25% a	23%	-%	22%	43%	27% b	13%	15%	26% a	16%	-%
Convenience / ease of use	171	29	20	122	171	-	168	3	105	14	48	121	50	2
	16%	18%	28% c	14%	16%	-%	16%	10%	15%	17%	17%	15%	18%	35%
Price of postage	73	12	5	55	73	-	71	2	34	11	22	50	18	-
	7%	8%	7%	6%	7%	-%	7%	6%	5%	12% a	8%	6%	7%	-%
Proof of delivery / know it has got there / reliable	71	8	10	53	71	-	71	*	35	19	33	36	25	-
	6%	5%	13% ac	6%	6%	-%	7%	2%	5%	22% a	12% b	5%	9%	-%
Everyone else is doing it / client's like this method	55	7	3	46	55	-	52	4	37	4	10	43	8	1
	5%	4%	4%	5%	5%	-%	5%	12%	5%	5%	4%	5%	3%	21%
Speed - instantaneous / fast response	55	8	8	39	55	-	53	2	38	2	22	32	10	-
	5%	5%	11% c	5%	5%	-%	5%	7%	6%	2%	8% b	4%	4%	-%
Environmental reasons	34	4	*	30	34	-	33	*	26	2	6	28	11	*
	3%	2%	%	3%	3%	-%	3%	2%	4%	2%	2%	4%	4%	2%
Unreliable postal service	29	5	*	23	29	-	28	*	8	9	19	7	4	2
	3%	3%	%	3%	3%	-%	3%	%	1%	11% a	7% b	1%	2%	29%
Good for sending invoices / attachments	25	3	6	15	25	-	25	-	17	-	8	17	7	-
	2%	2%	8% ac	2%	2%	-%	2%	-%	2%	-%	3%	2%	3%	-%
Reduce admin time spent on alternative media	19	7	3	9	19	-	19	-	8	3	9	11	7	*
	2%	4% c	5% c	1%	2%	-%	2%	-%	1%	3%	3%	1%	3%	8%
Offers more creative choices	19	-	2	15	19	-	19	-	17	-	3	16	3	-
	2%	-%	2%	2%	2%	-%	2%	-%	2%	-%	1%	2%	1%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 93 (continuation)

Page 775

QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	*b	a	*b	a	b	a	b	a	*b
Unweighted total	1100	140	72	874	1100	-	1071	29	700	92	289	783	280	7
Weighted total	1095	158	71	857	1095	-	1064	31	681	86	287	780	275	6
Increase in postal prices	18	3	2	14	18	-	18	-	6	1	2	16	6	-
	2%	2%	3%	2%	2%	-%	2%	-%	1%	1%	1%	2%	2%	-%
More efficient	8	4	2	2	8	-	8	-	6	2	4	4	4	-
	1%	2%	3%	*%	1%	-%	1%	-%	1%	2%	1%	1%	1%	-%
		c	c											
For BACS transfers	5	-	-	5	5	-	5	-	1	-	2	3	1	-
	*%	-%	-%	1%	*%	-%	*%	-%	*%	-%	1%	*%	*%	-%
Royal Mail strike action	4	2	-	2	4	-	4	-	-	-	-	4	2	-
	*%	1%	-%	*%	*%	-%	*%	-%	-%	-%	-%	1%	1%	-%
Company budget has been diverted to other media	1	*	*	*	1	-	1	-	1	*	-	1	*	-
	*%	*%	*%	*%	*%	-%	*%	-%	*%	*%	-%	*%	*%	-%
Other	35	5	*	28	35	-	32	3	16	3	11	23	8	-
	3%	3%	*%	3%	3%	-%	3%	10%	2%	4%	4%	3%	3%	-%
Don't know	5	-	-	5	5	-	5	-	3	2	5	*	4	-
	*%	-%	-%	1%	*%	-%	*%	-%	1%	2%	2%	*%	1%	-%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b

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Table 93 (continuation)

Page 776

QF6. Why have you moved mail to other communication methods in the last 12 months?
Base: All who have moved some mail to other communication methods

	TOTAL	Quarter			
		Q3 2012	Q4 2012	Q1 2013	Q2 2013
Significance Level: 95%		a	b	c	d
Unweighted total	1100	302	301	277	220
Weighted total	1095	295	295	276	229
Cost saving	516	145	151	118	102
	47%	49%	51%	43%	44%
			c		
Quicker	498	134	129	139	95
	45%	45%	44%	50%	42%
Customer preferences	248	73	65	52	58
	23%	25%	22%	19%	26%
Convenience / ease of use	171	48	50	37	36
	16%	16%	17%	13%	16%
Price of postage	73	22	25	21	4
	7%	7%	8%	8%	2%
		d	d	d	
Proof of delivery / know it has got there / reliable	71	25	30	6	11
	6%	8%	10%	2%	5%
		c	cd		
Everyone else is doing it / client's like this method	55	20	19	9	8
	5%	7%	7%	3%	3%
Speed - instantaneous / fast response	55	32	12	2	8
	5%	11%	4%	1%	4%
		bcd	c		c
Environmental reasons	34	11	9	4	10
	3%	4%	3%	2%	4%
Unreliable postal service	29	12	12	4	1
	3%	4%	4%	1%	*%
		cd	d		
Good for sending invoices / attachments	25	14	6	2	2
	2%	5%	2%	1%	1%
		cd			
Reduce admin time spent on alternative media	19	5	4	10	*
	2%	2%	1%	3%	*%
			d		
Offers more creative choices	19	4	7	4	4
	2%	1%	2%	2%	2%
Increase in postal prices	18	10	8	*	-
	2%	3%	3%	*%	-%
		cd	cd		
More efficient	8	-	-	2	6
	1%	-%	-%	1%	2%

QF6. Why have you moved mail to other communication methods in the last 12 months?

Base: All who have moved some mail to other communication methods

Significance Level: 95%

Unweighted total

Weighted total

For BACS transfers

Royal Mail strike action

Company budget has been
diverted to other media

Other

Don't know

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1100	302	301	277	220
1095	295	295	276	229
5	2	2	-	1
1%	1%	1%	-%	1%
4	2	-	2	-
1%	1%	-%	1%	-%
1	-	*	*	*
1%	-%	1%	1%	1%
35	14	*	5	16
3%	5%	1%	2%	7%
	bc		b	bc
5	*	2	1	2
1%	1%	1%	1%	1%

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Table 94

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Weighting Var

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

North 0-9 Employees

North 10+ Employees

Mids 0-9 Employees

Mids 10+ Employees

South 0-9 Employees

South 10+ Employees

Wal/Sco/NI 0-9 Employees

Wal/Sco/NI 10+ Employees

Columns Tested: a,b,c,d,e,f,g,h,i,j,k,l,m

TOTAL	GOR												
	East of England	East Midlands	Greater London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Scotland	Wales	Northern Ireland	England
1604	a	b	c	d	e	f	g	h	i	j	k	l	m
Unweighted total	66	106	78	119	114	205	131	117	87	214	193	174	1023
Weighted total	95	176	112	117	116	278	189	209	88	87	75	63	1379
North 0-9 Employees	305	-	-	110	110	-	-	-	84	-	-	-	305
19%	-%	-%	-%	94%	95%	-%	-%	-%	95%	-%	-%	-%	22%
				abcfghijklmabcfghijklm					abcfghijklm				abcfghijkl
North 10+ Employees	16	-	-	6	5	-	-	-	4	-	-	-	16
1%	-%	-%	-%	6%	5%	-%	-%	-%	5%	-%	-%	-%	1%
				bcbfghijklm	bfbfghijklm				bfbfghijklm				
Mids 0-9 Employees	369	-	167	-	-	-	-	201	-	-	-	-	369
23%	-%	95%	-%	-%	-%	-%	-%	97%	-%	-%	-%	-%	27%
		acdefgijklm						acdefgijklm					acdefgijkl
Mids 10+ Employees	16	-	9	-	-	-	-	7	-	-	-	-	16
1%	-%	5%	-%	-%	-%	-%	-%	3%	-%	-%	-%	-%	1%
		cdefgijklm						defgijklm					
South 0-9 Employees	658	93	-	109	-	271	185	-	-	-	-	-	658
41%	98%	-%	98%	-%	-%	97%	98%	-%	-%	-%	-%	-%	48%
	bdehijklm		bdehijklm			bdehijklm	bdehijklm						bdehijkl
South 10+ Employees	16	2	-	2	-	8	4	-	-	-	-	-	16
1%	2%	-%	2%	-%	-%	3%	2%	-%	-%	-%	-%	-%	1%
	jk		jk			jkl	jk						
Wal/Sco/NI 0-9 Employees	209	-	-	-	-	-	-	-	-	82	69	57	-
13%	-%	-%	-%	-%	-%	-%	-%	-%	-%	95%	93%	91%	-%
										abcdefghabcbdefghim		abcdefghim	
Wal/Sco/NI 10+ Employees	16	-	-	-	-	-	-	-	-	5	5	6	-
1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	5%	7%	9%	-%
										bcdefghabcbdefghim		abcdefghim	

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Table 94 (continuation)

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Weighting Var

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

North 0-9 Employees

North 10+ Employees

Mids 0-9 Employees

Mids 10+ Employees

South 0-9 Employees

South 10+ Employees

Wal/Sco/Ni 0-9 Employees

Wal/Sco/Ni 10+ Employees

Columns Tested: a,b,c,d,e,f - a,b - a,b - a,b,c,d

TOTAL	Business Size						Urbanity		Location		Annual Postal spend			
	0-9	Ten to 49	50-99	100-249	250+	10+	Urban	Rural	HQ	Branch	Less than £1k	£1k-£2.5k	£2.5k-£5k	More than £5k
	a	b	c	d	e	f	a	b	a	b	a	b	c	d
1604	1210	244	55	42	53	394	1098	506	1478	126	1016	311	127	150
1604	1540	39	10	7	8	64	1141	463	1545	59	1113	291	105	95
305	305	-	-	-	-	-	241	64	297	8	227	51	17	10
19%	20%	-%	-%	-%	-%	-%	21%	14%	19%	13%	20%	17%	16%	11%
	bcd						b				d			
16	-	10	2	2	2	16	15	1	12	4	6	4	1	5
1%	-%	26%	22%	24%	27%	25%	1%	1%	1%	6%	1%	1%	1%	5%
		a	a	a	a	a				a				ab
369	369	-	-	-	-	-	265	104	358	11	261	68	21	19
23%	24%	-%	-%	-%	-%	-%	23%	22%	23%	18%	23%	23%	20%	20%
	bcd													
16	-	9	3	2	2	16	12	4	13	3	4	3	4	5
1%	-%	23%	34%	32%	20%	25%	1%	1%	1%	6%	1%	1%	4%	5%
		a	a	a	a	a				a			a	ab
658	658	-	-	-	-	-	475	183	636	22	446	124	47	41
41%	43%	-%	-%	-%	-%	-%	42%	39%	41%	36%	40%	43%	44%	43%
	bcd													
16	-	10	2	1	2	16	12	4	12	4	6	5	2	3
1%	-%	26%	25%	18%	27%	25%	1%	1%	1%	6%	1%	2%	2%	3%
		a	a	a	a	a				a			a	a
209	209	-	-	-	-	-	111	98	204	5	157	33	11	9
13%	14%	-%	-%	-%	-%	-%	10%	21%	13%	8%	14%	11%	10%	9%
	bcd							a						
16	-	10	2	2	2	16	10	6	12	4	6	4	2	3
1%	-%	26%	19%	26%	26%	25%	1%	1%	1%	7%	1%	1%	2%	4%
		a	a	a	a	a				a				a

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Table 94 (continuation)

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Weighting Var

Base: All Respondents

TOTAL	Monthly Mail Volume Sent - letters and large letters							Monthly Mail Volume Sent - packets and parcels					Main provider (volume)		Main provider (contract value)	
	0-24	25-49	50-99	100-249	250-499	500-4,999	5,000+	0-24	25-49	50-99	100-249	250+	Royal Mail	Provider other than Royal Mail	Royal Mail	Provider other than Royal Mail
Significance Level: 95%	a	b	c	d	e	f	*g	a	b	c	d	e	a	b	a	b
Unweighted total	1604	620	306	220	247	120	78	1364	94	54	51	41	291	116	197	211
Weighted total	1604	719	312	239	218	78	29	1413	75	43	43	30	274	123	179	217
North 0-9 Employees	305	131	61	57	38	13	4	278	8	10	4	5	47	27	34	40
	19%	18%	20%	24%	17%	17%	14%	20%	10%	24%	9%	18%	17%	22%	19%	19%
North 10+ Employees	16	2	3	2	4	3	2	11	2	1	2	1	5	1	2	4
	1%	1%	1%	1%	2%	4%	9%	1%	2%	3%	4%	3%	2%	1%	1%	2%
				a	ac	abcd				bd	a					
Mids 0-9 Employees	369	180	72	47	47	21	2	324	19	4	11	11	66	28	38	55
	23%	25%	23%	20%	21%	27%	7%	23%	26%	10%	25%	36%	24%	22%	21%	25%
		f	f	f	f	f		c	c		c	c				
Mids 10+ Employees	16	1	4	2	2	4	3	11	2	1	*	1	4	2	2	4
	1%	1%	1%	1%	1%	5%	10%	1%	3%	3%	1%	3%	1%	2%	1%	2%
			a		abcd	abcd			a							
South 0-9 Employees	658	297	127	104	91	23	7	577	32	20	22	7	118	52	77	93
	41%	41%	44%	42%	30%	25%	74%	41%	43%	46%	50%	24%	43%	42%	43%	43%
		ef	ef	ef	ef			e	e	e	e					
South 10+ Employees	16	2	4	2	4	3	2	11	2	1	1	1	5	2	3	3
	1%	1%	1%	1%	2%	3%	7%	1%	3%	3%	1%	5%	2%	1%	2%	1%
				a	a	abcd					a					
Wal/Sco/Ni 0-9 Employees	209	102	39	24	29	9	6	189	8	5	3	3	25	10	20	16
	13%	14%	12%	10%	13%	12%	20%	13%	11%	11%	8%	10%	9%	8%	11%	7%
						c										
Wal/Sco/Ni 10+ Employees	16	3	2	2	3	3	2	12	2	1	1	*	4	1	3	2
	1%	1%	1%	1%	2%	3%	8%	1%	2%	1%	3%	1%	1%	1%	2%	1%
					ab	abcd										

Columns Tested: a,b,c,d,e,f,g - a,b,c,d,e - a,b - a,b

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Table 94 (continuation)

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Weighting Var

Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

North 0-9 Employees

North 10+ Employees

Mids 0-9 Employees

Mids 10+ Employees

South 0-9 Employees

South 10+ Employees

Wal/Sco/NI 0-9 Employees

Wal/Sco/NI 10+ Employees

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b

TOTAL	Role of mail services			Types of mail sent regularly						Types of service used			RM Services used for Standard Mail	
	Administrative only	Critical for communications	Core to business operations	Letters	Large Letters	All Letters	Parcels and Packets	Bulk Mailings	Others	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	1st class services	2nd class services
	a	b	c	a	b	c	d	e	f	a	b	c	a	b
1604	777	298	516	1484	958	1506	766	453	1263	701	1489	297	1208	1107
1604	811	282	498	1478	904	1503	730	380	1269	669	1480	234	1193	1076
North 0-9 Employees	305	149	57	284	158	288	127	67	235	123	285	38	231	201
19%	18%	20%	19%	19%	17%	19%	17%	18%	19%	18%	19%	16%	19%	19%
North 10+ Employees	16	5	4	15	13	15	10	8	14	8	15	3	13	12
1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
Mids 0-9 Employees	369	184	53	337	197	346	170	91	303	165	341	45	257	248
23%	23%	19%	26% b	23%	22%	23%	23%	24%	24%	25%	23%	19%	21%	23%
Mids 10+ Employees	16	7	5	16	13	16	10	8	13	9	15	7	13	14
1%	1%	2%	1%	1%	1%	1%	1%	2%	1%	1%	1%	3%	1%	1%
South 0-9 Employees	658	340	127	606	398	616	312	145	520	269	602	99	505	435
41%	42%	45% c	37%	41%	44% e	41%	43%	38%	41%	40%	41%	42%	42%	40%
South 10+ Employees	16	6	4	15	13	16	11	8	14	10	16	5	13	11
1%	1%	2%	1%	1%	1%	1%	1%	2%	1%	1%	1%	2%	1%	1%
Wal/Sco/NI 0-9 Employees	209	112	28	190	99	192	81	47	158	76	190	33	148	142
13%	14%	10%	14%	13%	11%	13%	11%	12%	12%	11%	13%	14%	12%	13%
Wal/Sco/NI 10+ Employees	16	6	4	15	12	15	9	7	12	9	15	5	13	12
1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	2%	1%	1%

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Table 94 (continuation)

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Weighting Var

Base: All Respondents

TOTAL	RM product changes			Types of mail received						Types of services for received mail			Future volume of mail		
	Higher to lower cost	Lower to higher cost	Has not changed /DK	Letters	Large Letters	All Letters	Packets and Parcels	Others	None / DK / Ref	Urgent, Tracked or Timed Services	Standard Delivery	International / Cross border	Increase	Decrease	Stay the same
Significance Level: 95%	a	b	c	a	b	c	d	e	f	a	b	c	a	b	c
Unweighted total	276	35	1269	1571	1376	1577	1226	1595	1	924	1572	408	158	242	1201
Weighted total	1604	261	36	1560	1346	1567	1201	1592	2	896	1568	357	146	240	1215
North 0-9 Employees	305	45	9	293	253	297	222	303	-	175	298	66	27	49	227
	19%	17%	25%	19%	19%	19%	18%	19%	-%	20%	19%	19%	19%	21%	19%
North 10+ Employees	16	3	1	16	15	16	12	16	-	10	16	4	2	2	12
	1%	1%	2%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
Mids 0-9 Employees	369	55	11	358	312	360	280	365	-	197	360	61	34	47	288
	23%	21%	30%	23%	23%	23%	23%	23%	-%	22%	23%	17%	23%	19%	24%
Mids 10+ Employees	16	4	-	16	14	16	12	16	-	11	16	6	1	2	13
	1%	1%	-%	1%	1%	1%	1%	1%	-%	1%	1%	2%	1%	1%	1%
South 0-9 Employees	658	109	11	640	548	640	491	652	2	371	642	158	57	104	495
	41%	42%	30%	41%	41%	41%	41%	41%	100%	41%	41%	44%	39%	43%	41%
South 10+ Employees	16	3	*	16	15	16	13	16	-	10	16	5	2	3	11
	1%	1%	*%	1%	1%	1%	1%	1%	-%	1%	1%	1%	1%	1%	1%
Wal/Sco/NI 0-9 Employees	209	38	4	205	173	206	157	208	-	111	204	50	20	30	158
	13%	15%	12%	13%	13%	13%	13%	13%	-%	12%	13%	14%	14%	13%	13%
Wal/Sco/NI 10+ Employees	16	3	*	16	15	16	14	16	-	11	16	6	2	3	11
	1%	1%	1%	1%	1%	1%	1%	1%	-%	1%	1%	2%	1%	1%	1%

Columns Tested: a,b,c - a,b,c,d,e,f - a,b,c - a,b,c

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Weighting Var

Base: All Respondents

	TOTAL	Considered trying provider other than RM			Have moved to other communication methods		Has internet connection		Satisfaction with services from Royal Mail		Experienced problems with service from Royal mail in last 6 months		Satisfaction with other main provider	
		Yes - tried	Yes - not tried	No	Yes	No	Yes	No	Satisfied	Dissatisfied	Yes	No	Satisfied	Dissatisfied
Significance Level: 95%		a	b	c	a	b	a	b	a	b	a	b	a	b
Unweighted total	1604	189	101	1294	1100	504	1497	107	1062	120	389	1177	387	10
Weighted total	1604	206	104	1281	1095	509	1497	107	1038	123	395	1175	376	8
North 0-9 Employees	305	60	13	232	209	96	279	26	185	26	71	223	75	3
	19%	29%	13%	18%	19%	19%	19%	24%	18%	21%	18%	19%	20%	32%
North 10+ Employees	16	1	1	13	11	5	16	*	11	2	5	11	6	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	2%	2%
Mids 0-9 Employees	369	49	32	284	254	114	348	21	244	23	95	265	85	2
	23%	24%	31%	22%	23%	22%	23%	20%	23%	19%	24%	23%	23%	26%
			c											
Mids 10+ Employees	16	3	2	11	11	5	16	-	10	2	4	11	6	-
	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%
South 0-9 Employees	658	73	45	534	452	206	624	34	418	56	168	480	161	2
	41%	36%	43%	42%	41%	40%	42%	32%	40%	45%	43%	41%	43%	22%
							b							
South 10+ Employees	16	2	1	12	12	4	16	*	9	1	4	11	5	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	4%
Wal/Sco/NI 0-9 Employees	209	16	9	182	134	74	184	25	149	12	42	161	33	1
	13%	8%	8%	14%	12%	15%	12%	23%	14%	10%	11%	14%	9%	12%
				a				a						
Wal/Sco/NI 10+ Employees	16	2	1	12	12	4	16	*	12	1	4	11	5	*
	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%

Columns Tested: a,b,c - a,b - a,b - a,b - a,b - a,b

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Table 94 (continuation)

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Weighting Var
Base: All Respondents

Significance Level: 95%

Unweighted total

Weighted total

North 0-9 Employees

North 10+ Employees

Mids 0-9 Employees

Mids 10+ Employees

South 0-9 Employees

South 10+ Employees

Wal/Sco/NI 0-9 Employees

Wal/Sco/NI 10+ Employees

Columns Tested: a,b,c,d

TOTAL	Quarter			
	Q3 2012	Q4 2012	Q1 2013	Q2 2013
	a	b	c	d
1604	405	410	403	386
1604	392	403	410	399
305	88	66	88	62
19%	22%	16%	22%	16%
	bd		d	
16	4	5	4	3
1%	1%	1%	1%	1%
369	78	93	102	95
23%	20%	23%	25%	24%
16	6	3	5	3
1%	1%	1%	1%	1%
658	163	181	154	159
41%	42%	45%	38%	40%
		c		
16	6	5	4	2
1%	1%	1%	1%	*%
209	42	44	50	73
13%	11%	11%	12%	18%
				abc
16	5	6	4	2
1%	1%	1%	1%	*%