

6 Post

6.1 Sending and receiving post in Wales: residential customers

Residents in Wales are more likely to say they love sending and receiving post

When asked about their attitudes to post, nearly two-thirds of adults in Wales said they loved sending and receiving letters and cards (65%), higher than any other UK nation (Figure 6.1).

However, this does not appear to be driven by their sending mail - people in Wales only send an average of 6.7 items each month, compared to 8 items for people living in England.

Figure 6.1 Attitudes to sending and receiving post



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

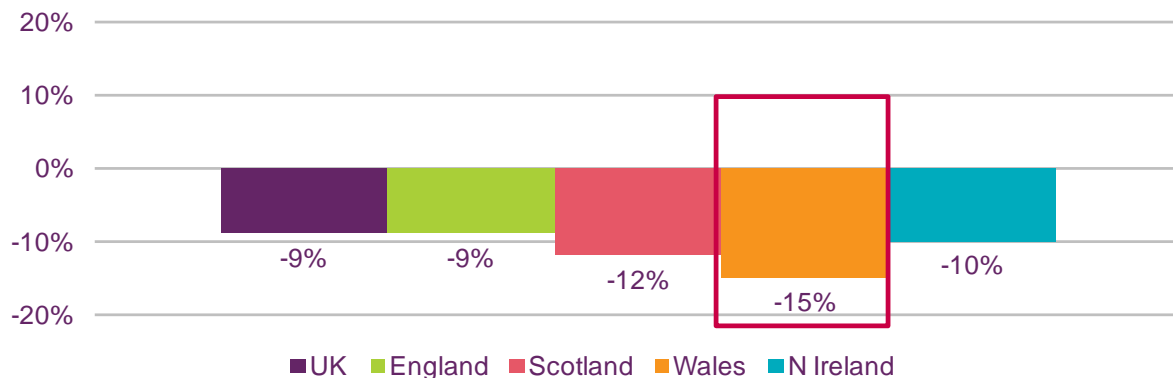
Base: All respondents (n = 3671 UK, 399 Wales)

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

People in Wales are more likely to have reduced, and to expect to continue to reduce, the amount of post they send

When asked whether the amount of post they send has changed recently, people in Wales are the most likely to say they now send less post (-15% net). They also anticipate that they will reduce their use of post for sending letters, cards and parcels in the future (-16% net).

Figure 6.2 Net claimed change in amount of post sent in past two years



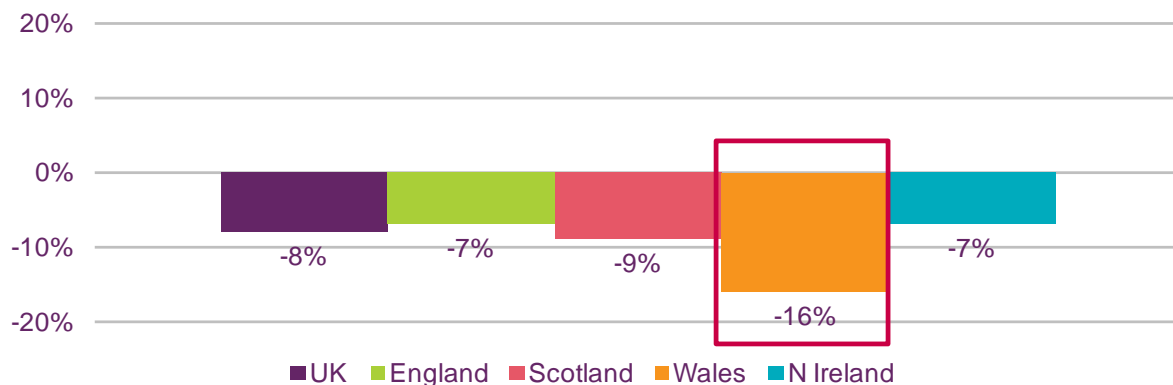
Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

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

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

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

Figure 6.3 Change in amount of post predicted to be sent in the next two years



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

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

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

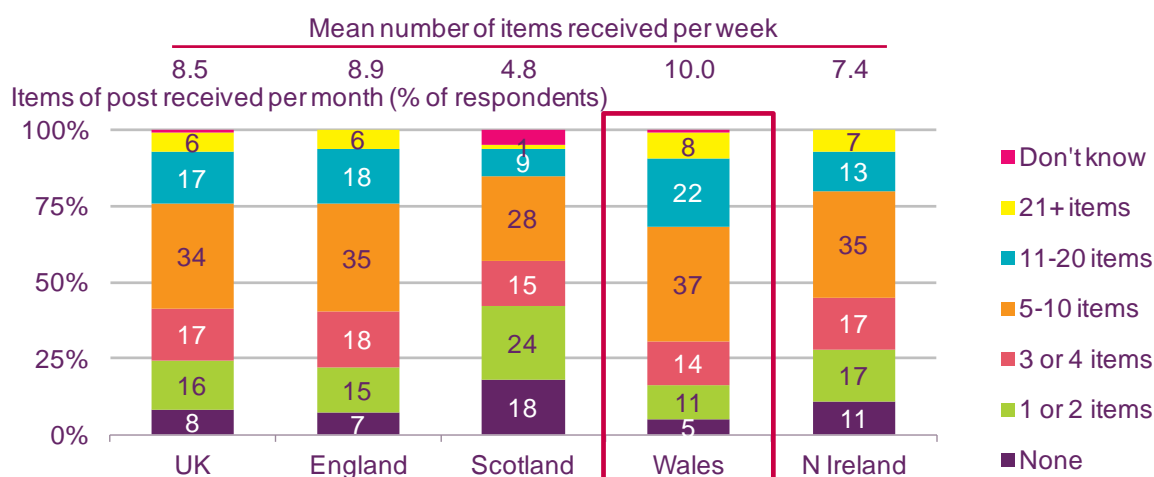
Note: chart shows net percentage (% who claim their use will increase - % those who claim their use will decrease)

People in Wales receive the most items of post and are more likely than the UK as a whole to have ordered goods to be delivered

When asked about the amount of post they have received in the past week, people in Wales claim to have received the highest average number of items (10), especially when compared to residents in Scotland (4.8).

This is perhaps due to the high propensity of people living in Wales to order items for delivery by post; Figure 6.5 shows that over three-quarters of residents have done this compared to just 69% across the UK as a whole.

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

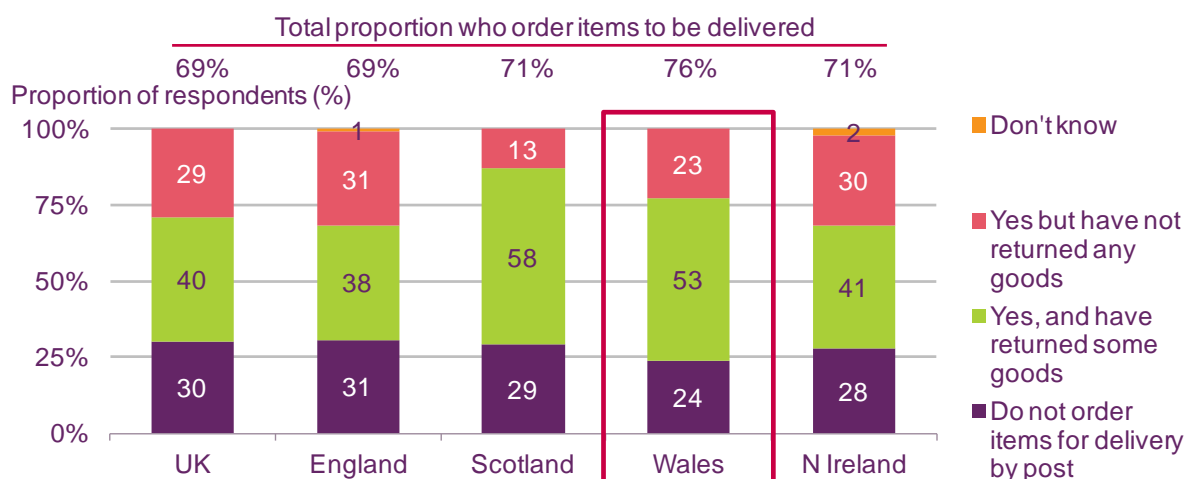


Source: Ofcom Residential Postal Tracker, Q3 2012-Q1 2013

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

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

Figure 6.5 Proportion of consumers who have ordered items to be delivered by post



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

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

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

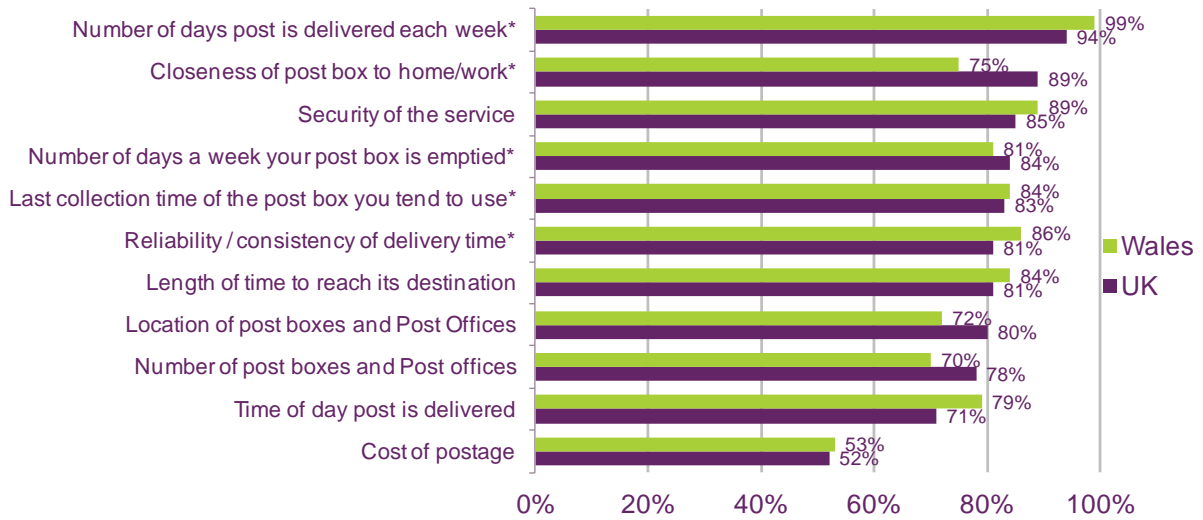
6.2 Attitudes towards Royal Mail

Nine in ten residents in Wales are satisfied with Royal Mail

When asked about their overall satisfaction levels with Royal Mail, the majority of people in Wales (90%) say they are satisfied, compared to 86% across the UK as a whole.

This appears to be primarily driven by satisfaction with delivery times (Figure 6.6). However, people in Wales are less satisfied with the closeness of post boxes to home or work.

Figure 6.6 Satisfaction with specific aspects of Royal Mail's service



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

Base: All respondents (n = 3671 UK, 399 Wales)

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

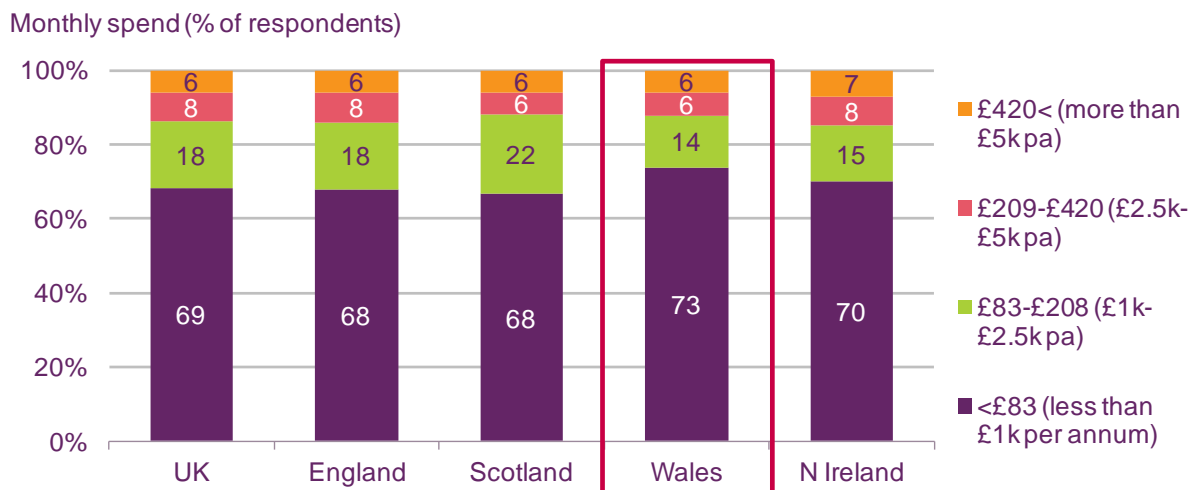
*Base: All respondents (from Q1 2013) (n = 1224 UK, 138 Wales)

6.3 Sending and receiving post: business customers

Almost three-quarters of business in Wales spend less than £1k on post each year

Businesses in Wales are the most likely to say that post plays a mainly administrative role, especially when compared to businesses in Northern Ireland (57% v 48%). Perhaps as a consequence, nearly three-quarters of businesses (73%) in Wales spend less than £1k each year on sending post (Figure 6.7).

Figure 6.7 Monthly spend on sending postal items



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

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

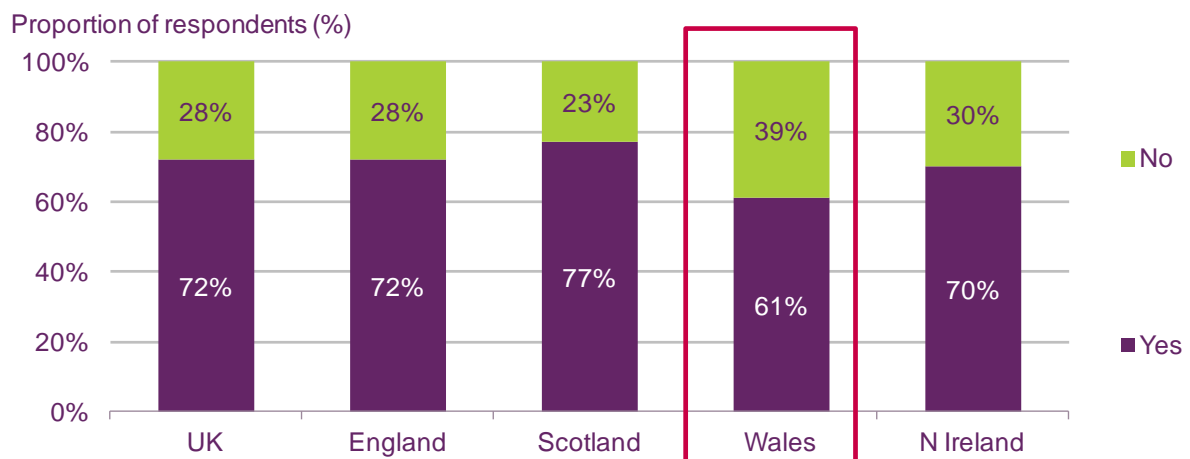
QV1. On average, how much money does your organisation spend per month on sending mail items? Please think about all the letters, packets and parcels you may send as an organisation.

Businesses in Wales are the least likely to have switched some mail to other communication methods in the past year

When asked if their organisation had moved some of its mail to another form of communication over the past 12 months, 61% of respondents in Wales said that they had (Figure 6.8), less than in other UK nations. Among those who have, they are more likely to say this is for reasons of speed, rather than as a cost-saving exercise.

In addition, when asked about the volume of mail they plan to send over the next 12 months, only 7% of businesses in Wales say they anticipated sending fewer items.

Figure 6.8 Amount of businesses switching to other forms of communication over the past year



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

Base: All respondents (n = 1218 UK, 804 England, 144 Scotland, 134 Wales, 136 N Ireland)
QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?