



**Consumer
Focus**
Campaigning for a fair deal

Postal omnibus survey

December 2009

About Consumer Focus

Consumer Focus is the statutory organisation that champions the interests of consumers across England, Wales, Scotland, and, for post, Northern Ireland.

We were formed through the merger of three organisations – energywatch, Postwatch and the National Consumer Council (including the Scottish and Welsh Consumer Councils).

Through campaigning, advocacy and research, we are the voice of the consumer in private and public sectors by working to secure fairer markets, greater value for money, and improved customer service.

Our findings

While these findings provide some interesting insights into social mail users' perceptions and needs, the findings are only the beginning of a greater body of research Consumer Focus intends to undertake in the near future. The findings presented here require further investigation, principally because we do not know why mail users have made these choices. It may be necessary to commission some form of quantitative and qualitative research to test the underlying explanations underpinning these findings. No analysis has been made on different respondent sub groups (age, social grade etc.) where the findings correspond with the overall results.

Please note that the sample size for this survey was 2,028 people and it was partly undertaken during a period of national industrial dispute. Throughout the survey respondents were asked to make their choices with reference to a 'service as usual' situation rather than the particular strike affected service which was running at the time of the survey.

Q1a. When communicating with friends and/or family which means of communication do you use most often?	
The telephone	72%
Face to face	11%
E-mail	6%
Text messaging	5%
The internet (Facebook, Skype etc)	2%
Post	1%
Fax	-
Other	2%
Don't know	1%

It is not surprising that the majority (72 per cent) of those surveyed use the telephone most when communicating with friends and family because it is a very convenient form of communication and is generally instantly available especially for those not familiar with new technology. Likewise, 85 per cent said they use electronic devices most while only one per cent said they would normally communicate by post most often. However this was slightly higher for those aged 65 or over and for those on a low income, but still low.

Those with limited or no access to the internet relied a little more on post than those who had access, but not excessively so. People without access to the internet use the telephone most for communicating with friends and family to a greater extent than those with some form of access to the internet (81 per cent compared to 70 per cent).

As a result those without access to the internet do not seem to rely on the post as their primary method of communication.

Q1b. When communicating with business and or Government/public bodies which means of communication do you use most often?	
The telephone	49%
Face to face	2%
E-mail	19%
Text messaging	1%
The internet (Facebook, Skype etc)	5%
Post	13%
Fax	-
Other	2%
None of these	6%
Don't know	1%

When communicating with Government/public bodies the number using post most increased to 13 per cent. The number communicating by e-mail most also increased to 13 per cent but 49 per cent still prefer to communicate by telephone. It would be interesting to know why this is the case.

It is noticeable that those between the ages of 55 and 64 (17 per cent) and those over 65 (20 per cent) prefer to communicate by post, presumably because it is a medium they are more comfortable with.

People without access to the internet rely to a greater extent on post or the telephone as their primary method of communication with businesses and public bodies in comparison with those you have some form of access to the internet.

A fractionally greater proportion of people living in rural areas say they use post as their primary method of communication with business/public bodies in comparison with those living in urban areas.

Q2. When was the last time you sent a parcel?	
Today	11%
Yesterday	16%
One week ago	34%
One month ago	19%
Six months ago	8%
One year ago	4%
Over a year ago	5%
Don't know	3%

A parcel had been sent in the last month by 80 per cent; of these 61 per cent had sent a parcel in the last week.

Access to facilities that allow consumers to post parcels is obviously needed.

Q3. On average how many items of post do you send in a typical month?	
0	11%
1-5	57%
6-10	18%
11-20	8%
21-30	2%
31-40	1%
41+	3%
Don't know	1%

In a typical month the vast majority of consumers post something but not in vast quantities. In a typical month, 57 per cent said that they normally post one to five items of mail, while over 10 per cent said they do not post anything. Only 14 per cent said they normally post over 11 items a month.

It is normal to post between one to five items a month for 65 per cent of those surveyed aged between 18-24; against 49 per cent of those aged over 65. However, 11 per cent of those aged 18-24 posted between six to 10 items a month against 23 per cent of those aged over 65. There was a similar difference for those posting 11-20 items a month; five per cent in the 18-24 category against 12 per cent for those over 65.

There seems to be a trend for older people posting more than younger people.

Those with access to the internet tend to send more items in a typical month in comparison with those without access to the internet. This finding appears slightly counterintuitive as one would expect that those without access to the internet would be more reliant on postal services. A possible reason for this may be an increase in social consumers using the internet as an e-retailer. Further research is required to confirm this cause.

Q4. In your opinion, how important or unimportant is the UK postal service to you?	
Very important	68%
Quite important	24%
Neither important nor unimportant	2%
Fairly unimportant	4%
Very unimportant	2%
Net important	92%
Net unimportant	6%
Don't know	-

The UK postal service is important to 92 per cent of respondents, with 68 per cent saying that it was very important. Interestingly the older population believe the postal service is very important while the younger generation believe it is quite important, yet when combined there is little difference between the 92 per cent that say it is important. Just six per cent of those surveyed said it was unimportant.

So although there are changes in communication methods post remains important.

Q5. Is the postal service more important to you as a sender or recipient of mail or both equally?	
Sender	5%
Recipient	27%
Equally	67%
Don't know	1%

The postal service was equally important to 67 per cent as a sender and as a receiver. However, this differed between the various age groups, as 54 per cent of 18-24 year olds considered it equally important against 74 per cent of those aged over 55. While 27 per cent of respondents said it was more important for them to receive mail rather than send post, a greater proportion of 18-24 year olds (40 per cent) said it was more important to receive rather than send mail. This may be that this group of people are more likely to purchase goods via the internet.

For those without access to the internet the postal service is slightly more important as a sender of mail in comparison with those with access to the internet. The postal service is also less important to those without internet access for receiving mail compared with those with access to the internet.

This can be partly explained as people without internet access are less likely to buy products and services on the internet and more likely to correspond with business/public bodies using non internet channels.

Q6. What types of mail are most important to you as a SENDER of mail	
Correspondence with business (paying bills for example)	38%
Correspondence with public bodies (local authority for example)	9%
Correspondence with family or friends (could include sending parcels to/and or relatives)	46%
Correspondence with voluntary organisations	3%
None of these	3%

The most popular response was correspondence with family or friends although correspondence with business was not too far behind. It will be interesting to find out what particular items social customers find most important for their sending needs (parcels or letters for example).

The relative importance of corresponding with business is higher for younger respondents compared with older respondents; while conversely, correspondence with family or friends is of greater importance to older respondents compared with younger respondents. It will be interesting to investigate whether this is a longer term trend.

Respondents on low income said correspondence with business was relatively less important in comparison with other social classes, while correspondence with family or friends was relatively more important for this group of respondents compared with other social classes.

Respondents residing in the south east placed greater importance on correspondence with business relative to correspondence with friends or family in contrast to respondents living in other parts of Great Britain. This may perhaps be explained by the greater concentration of commerce situated in the south east compared with the rest of the country.

Greater importance is placed on correspondence with friends or family as opposed to correspondence with business for those respondents without access to the internet in comparison with those respondents who have some form of access to the internet.

Q7. What types of mail are most important to you as a RECIPIENT of mail?	
Bills, statements, appointments	40%
Advertising mail	2%
Items bought on the internet, mail order etc which are delivered by post	20%
Publications (The Economist, Reader's Digest etc.)	3%
Correspondence between friends and family (including parcels, greeting cards etc).	33%
None of these	2%

The most important mail items for respondents to receive were transactional mail (bills, statements, appointments) followed closely by social mail (parcels, greeting cards etc). This may be a source of comfort for postal operators who fear that transactional mail will soon disappear completely. Perhaps surprisingly just 20 per cent of respondents believed receiving fulfilment items (items bought on internet, mail order) were the most important type of mail to receive, especially when considering that fulfilment mail is the major source of growth for postal operators. The importance given to advertising mail and publications was generally low. It will be interesting to understand why respondents answered in this way.

As with sending mail, older respondents placed greater importance on receiving social mail compared with transactional mail, while younger respondents placed greater importance on transactional mail compared with social mail. Perhaps unsurprising, fulfilment mail was more important for younger respondents compared with older respondents. This may be due to younger people being generally more familiar with I.T. in comparison with older people.

In comparison with sending mail, those respondents on low income placed greater importance on social mail than other social groups, although they placed similar importance on transactional mail in line with the other social grades. Fulfilment mail was of less importance to respondents on low income in comparison with other social grades, which is probably due to the lower degree of internet penetration for this social group.

Those respondents from the south east placed greater importance on transactional mail than respondents living in other parts of Great Britain. South east respondents stated social mail was less important to them than other respondents.

Those without access to the internet placed greater importance on receiving social mail in comparison with those with internet access. Unsurprisingly, fulfilment mail was less important for those without internet access in comparison with those who have access to the net.

Receiving bills and statements in the post seems to be a bit less important for people who live in rural areas in comparison with urban dwellers.

Q8. In general terms, what proportion of the mail that you send NEEDS to arrive the next day?	
All my mail	9%
Most of my mail	24%
Half of my mail	14%
Some of my mail	33%
None of my mail	19%
Don't know	1%

For this question we pressed respondents to identify what they really needed rather than what would be nice to have. A third of respondents believed that all or most of their mail needed to arrive the next day, while only 19 per cent of respondents said none of their mail needed to arrive the next day. This demonstrates there is a genuine need for a next day delivery service within the USO. It will be interesting to understand the reasons underpinning this finding and to investigate what the exact specification of a next day delivery service needs to be (exact delivery times for example).

There is a slight trend that a greater proportion of elderly customers need all of their sent mail to arrive the next day.

A higher proportion of respondents living in Scotland said that none of their mail needed to arrive the next day in comparison with respondents living in other parts of Great Britain.

Respondents without internet access generally placed greater importance on the need for their sent mail to arrive the next day in comparison with those with access to the web.

Respondents living in rural areas placed slightly less importance on the need for sent mail to arrive the next day in comparison with people who live in urban areas.

Q9. In general terms, what proportion of mail that you receive do you NEED to respond to on the same day?	
All my mail	3%
Most of my mail	8%
Half of my mail	9%
Some of my mail	45%
None of my mail	35%
Don't know	1%

As in question eight we pressed respondents to identify what they really needed rather than what would be nice to have. Only 11 per cent of respondents needed to respond to all or most of their mail on the same day, whereas 35 per cent said none of their mail needed to be responded to on the same day. However, 45 per cent of people said that some of their mail required a response on the same day. Further research is required to better understand the reasons underpinning these findings.

There is a slight trend that a greater proportion of those aged 18-24 compared with other age groups need to respond to the mail they receive the same day (20 per cent compared with 11 per cent overall).

Q10. Over the past 12 months, from your own experience, how would you rate Royal Mail's performance in providing the UK postal service?	
Very good	40%
Quite good	35%
Average	18%
Quite poor	3%
Very poor	2%
Net: good	76%
Net: poor	6%
Don't know	-

The vast majority of respondents to this question said that in their experience Royal Mail was performing well in delivering the UK postal service. It will be interesting to monitor customer responses to this question going forward.

There seems to be a slight trend that a greater proportion of older respondents believed that Royal Mail was performing well compared with younger respondents.

A slightly greater proportion of rural consumers rated Royal Mail's performance in delivering the UK postal service as good in comparison with urban consumers.

Q11. How often, if at all, have you experienced the situation of having received a P739 'Sorry you were out' card when you have been at home in the last 12 months?	
Never	44%
Once	15%
Twice	17%
Three times or more	23%
Don't know	1%

Royal Mail, although concerned about this issue, has been quick to dismiss instances of this practice as isolated occurrences during the current media debate. However, our survey suggests that this practice is far more widespread than initially expected. The majority of people surveyed said they had experienced this situation at least once in the last 12 months. This suggests that Royal Mail must undertake further investigation into the behaviour of their delivery staff.

The findings suggest that this practice has been experienced by a greater number of younger people than older people.

The survey suggests that this problem has affected a greater proportion of higher income respondents compared to lower income respondents.

The findings suggest this problem has been experienced by a greater proportion of people living in the south east, midlands and northern England than those living in Wales and the south west and Scotland. However, the percentage difference is fairly narrow.

Those with internet access claim to have experienced this problem to a greater extent than those without access.

A slightly smaller proportion of rural consumers said they had experienced this problem in comparison with urban consumers.

Q12. How convenient or inconvenient do you find collecting parcels/packets from Delivery/Callers Offices when the item could not be delivered because you were out?	
Very convenient	19%
Quite convenient	30%
Neither convenient or inconvenient	12%
Quite inconvenient	21%
Very inconvenient	16%
Net: convenient	49%
Net: inconvenient	37%
Don't know	2%

Just below half the people (49 per cent) polled said enquiry office services/facilities were very or quite convenient. However, nearly two-fifths (37 per cent) said that enquiry offices were quite or very inconvenient. This would suggest that enquiry office services while being fairly convenient require a degree of improvement. It will be interesting to question mail users about what aspects of enquiry services need improving, a piece of research Consumer Focus intends to commission in the near future.

People on high incomes were less likely to think the enquiry office services are convenient and more likely to think they were inconvenient in contrast to respondents from different social classes.

Scottish consumers are more likely to think the services they receive are convenient in contrast with other Great Britain respondents.

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If you have any questions or would like further information about our response please contact Cem Suleyman, Senior Policy Advocate, by telephone on 020 7799 7932 or via email: cem.suleyman@consumerfocus.org.uk

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