

# **Improving mail services between Northern Ireland and Republic of Ireland**

Research report prepared for Consumer  
Focus Post

16 November 2009

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# **Executive summary**

# 1. Executive summary

## 1.1 Objectives and methodology

The purpose of this research is to evaluate the cross-border mail performance from NI to ROI with regard to three main service dimensions: delivery time; value for money; and reliability.

A multi-method approach was employed involving:

- A mailing exercise in order to test delivery times from Northern Ireland to the Republic of Ireland;
- Telephone surveys among consumers living in border areas to the Republic of Ireland and small and medium businesses in Northern Ireland in order to assess the usage of cross-border mail and satisfaction with Royal Mail;
- In-depth interviews with logistics managers and financial managers of SMEs in order to gain deeper insights into the relevant issues from a business point of view.

## 1.2 Cross-border mail usage

- For a large proportion of people living in border areas cross-border mail is an important means of communication, with one in eight (13%) sending post to the Republic regularly. Sending and receiving post cross-border is highly correlated, further reinforcing that mail is used to keep in touch with contacts in the Republic of Ireland.
- Two in three businesses (68%) in Northern Ireland send post to the Republic of Ireland. The vast majority state that cross-border mail is at least fairly important to their business with almost half (45%) saying that it is essential for them.

## 1.3 Overall satisfaction with Royal Mail

- Views of Royal Mail's cross-border service are positive - four in five (79%) consumers and two in three (65%) businesses rate the service as good.
- The key areas for improvement, suggested by both consumers and businesses, are cost, delivery time and reliability.

## 1.4 Delivery time

- Actual delivery times between Northern Ireland and the Republic of Ireland average 2.15 weekdays which is almost identical to the average delivery time measured in the cross-border exercise from the Republic of Ireland to Northern Ireland undertaken by Ipsos MORI in 2008 (2.16 weekdays).
- While there is a sizeable gap between what businesses and consumers state to be an acceptable delivery time and what they perceive the delivery time to be, the actual delivery time tends to at least meet expectations on average. However, almost one quarter (23%) of all mail sent from Northern Ireland to the Republic of Ireland is not delivered within the average acceptable delivery time of two days.
- Contrary to expectations, delivery times tend to be shorter among those closer to the border in Northern Ireland.
- The day of posting has the biggest impact on delivery times of cross-border post. Due to collections and sorting occurring on Saturdays in Northern Ireland, post sent between Thursday and Saturday reaches its destination in fewer working days than post sent between Monday and Wednesday.

## 1.5 Cost and value for money

- Awareness of the need to use an EU interstate stamp to send post from Northern Ireland to the Republic of Ireland is low, with half of businesses (48%) and three in four (72%) consumers not familiar with the correct form of postage.
- With two in five social consumers being dissatisfied, value for money is the weakest of Royal Mail's service dimensions. For the vast majority, it is not acceptable that mail to ROI is more expensive than mail within the UK and 77% suggest that prices should be the same.
- Several businesses suggested that a harmonised all-Ireland rate should be implemented which should be more competitively priced than the EU rate because of the proximity of the two jurisdictions and because surface mail rather than air mail is used to transport the post.

## 1.6 Reliability

- Reliability of the cross-border service is rated positively – 85% of consumers and 75% of businesses say that Royal Mail offers a good service in this regard.
- While there seem to be only very few concerns about mail not reaching its destination, the degree to which consumers and businesses trust it is delivered in a certain time frame is much lower.
- For this reason not all are confident about using Royal Mail when items of post are important or time critical. Instead, alternatives, such as crossing the border, couriers and electronically sending information are used.
- There seems to be a need to promote the relatively unknown International Signed For and Airsure services especially among small businesses as these services provide a means to increase confidence in reliability and re-assurance that mail is delivered on schedule.

## 1.7 Alternatives to cross-border posting

- A quarter (27%) of all interviewed consumers and 17% of SMEs in Northern Ireland with business contacts in the Republic have taken post for ROI across the border to be sent within the Republic. Cost, perceived faster delivery times, convenience and reliability are the main reasons for doing so. Some businesses suggested that improvements to the Royal Mail service in these areas would reduce the need for them to cross the border to post.
- Although the vast majority of SMEs in Northern Ireland rely on Royal Mail for their mail services, a significant percentage of these businesses use alternative courier services (29%), in particular DHL, TNT and Fast Way.
- There is a general trend that SMEs appear to be substituting traditional mail with electronic forms of communications, as this is perceived to be more efficient.

# Introduction

## 2. Introduction

### 2.1 Background

Consumer Focus is the new statutory organisation formed through a merging of Postwatch, Energywatch and the National Consumer Council. It has been set up to secure a fair deal on behalf of the consumer through shaping policy to better reflect consumers' needs.

Consumer Focus Post (NI) campaigns for improvements in Post Office services in the Province, including better mail services between Northern Ireland and both Great Britain and the Republic of Ireland.

Prior to this research there have been gaps in knowledge regarding the performance of mail services between Northern Ireland and the Republic of Ireland. The only existing evidence of cross-border mail service performance is the results of a survey carried out in 2008 for Postwatch Northern Ireland by Ipsos MORI which involved evaluating cross-border mail performance from the Republic of Ireland (ROI) to Northern Ireland (NI) through posting and recording delivery times of a sample of 504 standard letters.

This research was commissioned in order to evaluate the cross-border mail performance from NI to ROI with regard to three main service dimensions:

- Delivery time;
- Value for money;
- Reliability.

In addition, evidence should be provided for assessing the degree to which the standards of cross-border mail services vary according to where in Northern Ireland mail is posted from, and if, for example, people in rural areas are disadvantaged compared to those living in urban areas.

### 2.2 Objectives

The detailed objectives of the research are to:

- Assess speed of delivery of a sample of letters from NI to ROI;
- Evaluate performance against the 2008 research of postal services from ROI to NI and against performance aspirations;

- Identify any significant variations in performance in relation to specific points of posting and destinations and assess if certain areas in Northern Ireland are receiving a particularly poor service;
- Establish consumer knowledge of the correct postage of sending mail to ROI;
- Assess consumers expectations, perceptions and levels of satisfaction regarding
  - The cost of posting a standard letter to ROI;
  - The timescale for delivery of a letter to an address in ROI;
  - The reliability of mail services to ROI;
- Assess the views of business representatives on the performance, value for money and reliability of cross-border postal services from a business / financial point of view;
- Establish levels of overall satisfaction with Royal Mail regarding cross-border mail services.

# Methodology

## 3. Methodology

A multi-method approach was employed which comprised the following elements.

### 3.1 Mail survey

The first element of the research involved sending mail from a range of locations in Northern Ireland to a number of locations in the Republic of Ireland, over a two month period from 3<sup>rd</sup> August to 25<sup>th</sup> September 2009.

In total, 504 individual items of post were sent, 18 items from each of 28 separate postboxes in Northern Ireland. Senders and recipients were geographically spread across a total of 28 destinations in Northern Ireland and the Republic of Ireland to give an adequate geographical spread.

Two or three envelopes of different sizes were posted from each selected postbox in the Republic of Ireland every week for the eight weeks. For each postbox, the receiver address was changed each time in order to get as wide a spread for the sample as possible. There was no specified day for posting, however a good spread of days (Monday to Saturday) and various times of the day were covered within the overall project.

A unique identification number was placed on back of each pre-stamped and pre-addressed envelope in order to track delivery dates. The information that the senders and the recipients recorded is detailed below:

Figure 1

Information recorded by the <b>sender</b>	Information recorded by the <b>recipient</b>
<ul style="list-style-type: none"> <li>▪ Unique ID number of item</li> <li>▪ Date of posting</li> <li>▪ Time of posting</li> <li>▪ Name of sender</li> <li>▪ Recipient name and address</li> <li>▪ Location of postbox (as stated on postbox)</li> <li>▪ Postbox number (as stated on postbox)</li> <li>▪ Time of last collection (as stated on postbox)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Unique ID number of item</li> <li>▪ Date of receipt (time is not required)</li> <li>▪ Name of recipient</li> <li>▪ Location of recipient</li> </ul>

Source: Ipsos MORI

The following rules were applied to calculate the time of delivery:

- Only weekdays (Mon. – Fri) are counted for the delivery time;
- If the date of posting is after the last collection time listed on the post-box on Monday, Tuesday, Wednesday, Thursday, Friday or Saturday, then the date of posting is counted as the next day of collection stated on the specific postbox;
- If the date of posting is Sunday then the date of posting is counted as Monday;
- If the date of posting is a public holiday in Northern Ireland (the only example during the fieldwork period is Monday 31<sup>st</sup> August), then the date of posting is counted as the following weekday (i.e. Tuesday 1<sup>st</sup> September).
- An Post is only committed to delivering post from Monday to Friday. Therefore, if a letter was posted on Friday the first day for calculating the delivery time would be Monday.

## 3.2 Telephone interviews

The intention of telephone survey was to obtain quantitative information on usage of and attitudes towards cross border mail services from two key audiences:

- Members of the general public in Northern Ireland who live in border areas;
- Logistics / Financial Managers of small and medium enterprises (SMEs) businesses.

### 3.2.1 Consumer survey

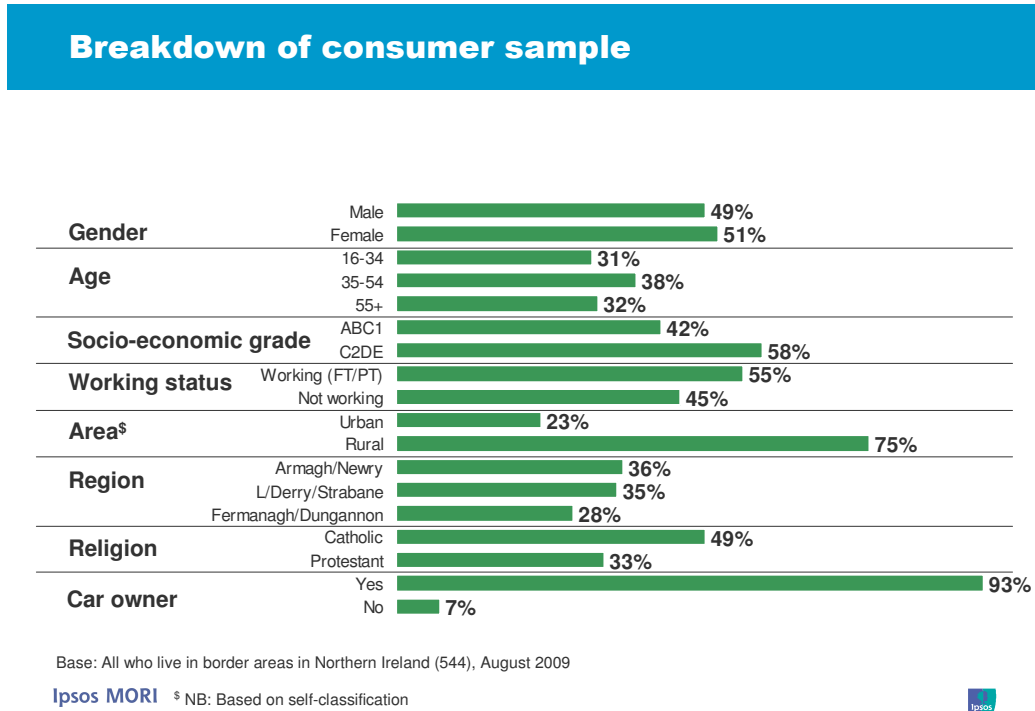
554 interviews were conducted in total with quotas on age, gender, working status and location. In the telephone survey focus was given to consumers in border areas as cross-border mail sent and received in these locations undertakes what could be a lengthy and complicated journey despite the proximity to the border. Furthermore, it was considered consumers in border areas were more aware of alternatives methods of cross border mailing, including personally transporting mail across the border for delivery in the Republic of Ireland. The interviews were obtained in the following locations:

- L/Derry and Strabane;
- Fermanagh and Dungannon;

- Armagh and Newry & Mourne.

The overall sample breaks down as shown below.

Figure 2



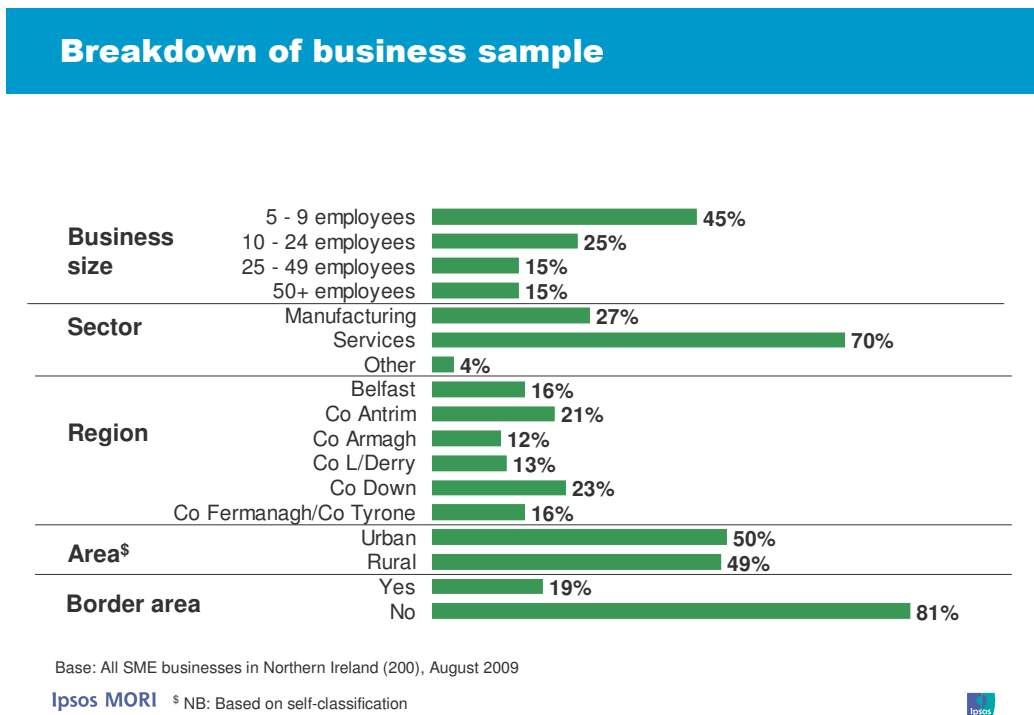
Source: Ipsos MORI

### 3.2.2 Business survey

For the business survey, 200 interviews were conducted in total with logistics managers, financial managers or those responsible for financial aspects of post of Small and Medium Enterprises (SMEs). Quotas were placed on size of business.

The profile of the business sample is charted overleaf.

Figure 3



Source: Ipsos MORI

### 3.3 Depth interviews with business representatives

Sixteen depth interviews were conducted with logistics managers, financial managers or those responsible for financial aspects of post of SMEs who stated in the business survey that cross-border mail was important or essential to their organisation. The respondents were geographically spread across Northern Ireland and included a mix of different business size classes and rural / urban locations. The depth interview sample structure is detailed overleaf.

Figure 4

Depth interview profile				
	Location	Area	Business size	Importance of cross-border mail to business
1	Craigavon	Urban	25 to 49	Essential
2	Newry	Rural	25 to 49	Very important
3	Enniskillen	Rural	5 to 9	Fairly important
4	L/Derry	Urban	10 to 24	Essential
5	Armagh	Rural	10 to 24	Essential
6	Ballymena	Rural	5 to 9	Essential
7	Newtownabbey	Urban	10 to 24	Very important
8	Carrickfergus	Urban	5 to 9	Essential
9	L/Derry	Urban	10 to 24	Fairly important
10	Omagh	Rural	50 to 99	Essential
11	Belfast	Urban	50 to 99	Fairly important
12	Newry	Urban	5 to 9	Fairly important
13	Belfast	Urban	10 to 24	Essential
14	Limavady	Rural	10 to 24	Essential
15	Belfast	Urban	25 to 49	Essential
16	Magherafelt	Rural	25 to 49	Essential

Source: Ipsos MORI

# **Cross-border mail usage**

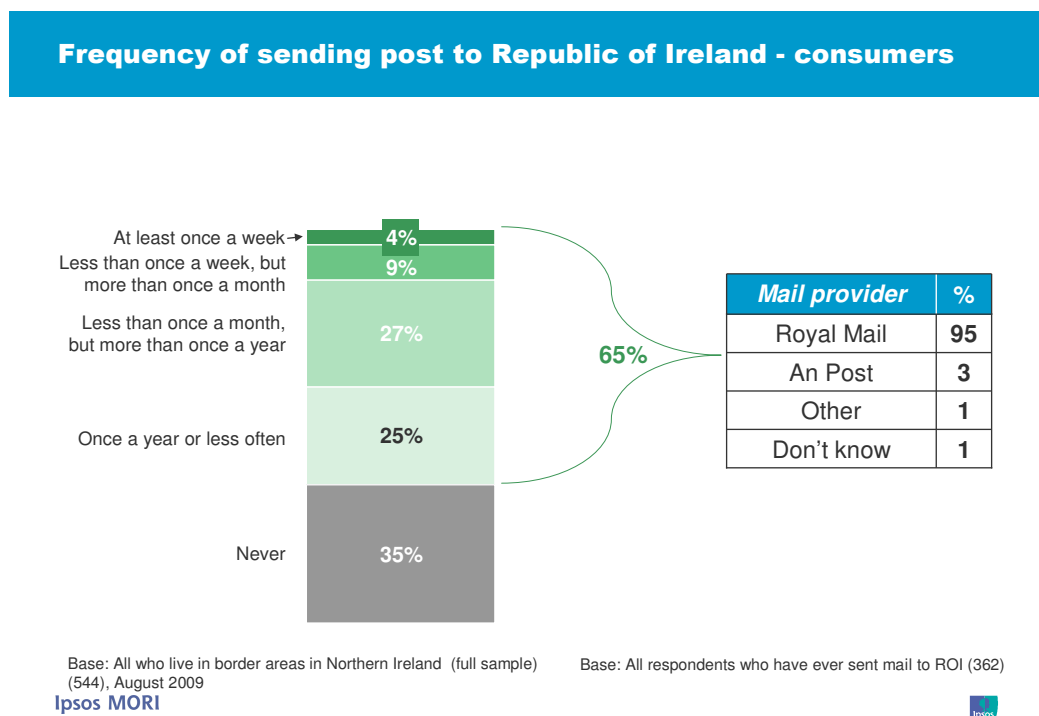
## 4. Cross-border mail usage

### 4.1 Consumers

#### 4.1.1 Sending cross-border mail

Two in three (65%) residents in border areas have ever sent post to the Republic of Ireland. Four in ten send mail to the Republic more than once a year and 13% more than once a month. The vast majority of consumers state that they use Royal Mail. 3% identify An Post as the mail service provider that they normally use to send post to the Republic of Ireland.

Figure 5



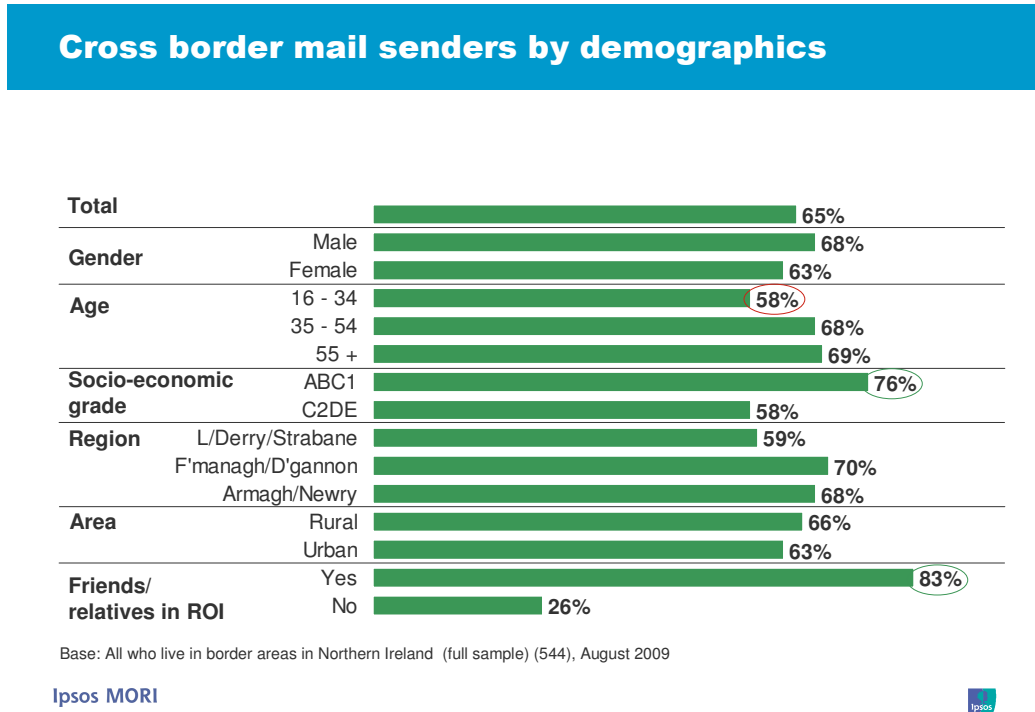
Source: Ipsos MORI

More than eight in ten of those who have friends or relatives in the Republic have ever sent mail to the South and almost one in five do so at least once a month, implying the importance of post to keep in touch with social contacts. The share of people sending mail across the border is greater among higher socio-economic groups (ABC1s: 76%) than among lower socio-economic groups (C2DEs: 58%).

Age is another important determinant of cross-border mail usage as the share of cross-border mail senders is significantly lower among younger people (16-34 year olds), possibly

because other forms of communication have substituted the usage of postal services in general to a greater degree than among other age groups.

Figure 6



Source: Ipsos MORI

There are differences in the way in which people send post - a third (35%) of cross-border mail users use stamps they bought in advance, 54% bring their post to the post office, 11% do both.

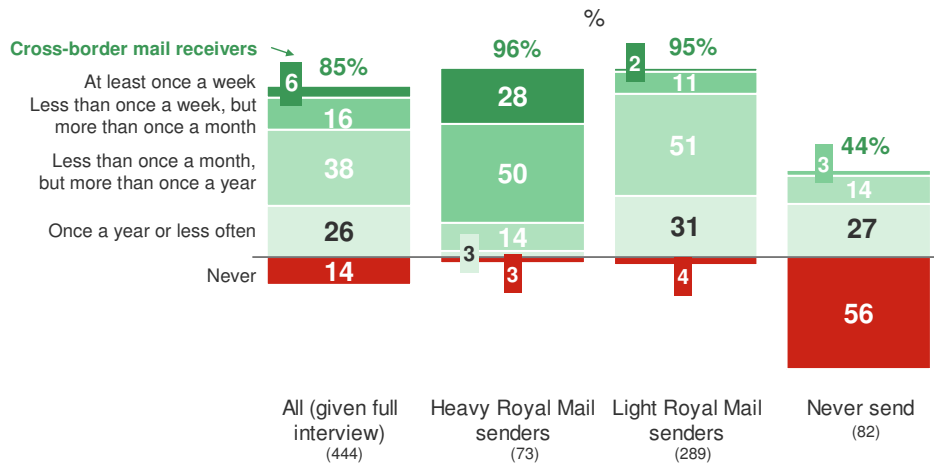
#### 4.1.2 Receiving cross-border mail

Almost nine in ten (85%) residents in border areas have ever received post from ROI. More than one-fifth (22%) of residents receive mail on a regular basis. This is more frequent among over 35s (24% versus 16% among 16-34 year olds) and among men (27% versus 17% of women).

Not surprisingly, there is a clear relationship between sending and receiving post cross-border, implying that the cross-border postal system is an important means of keeping in touch with contacts in the Republic of Ireland.

Figure 7

## Frequency of receiving post from ROI Consumers



Base: All respondents (given whole interview) (bases in brackets), August 2009

Ipsos MORI

NB: Heavy Royal Mail senders = send to ROI at least once a month; Light Royal Mail senders = have ever sent to ROI but less often than once a month

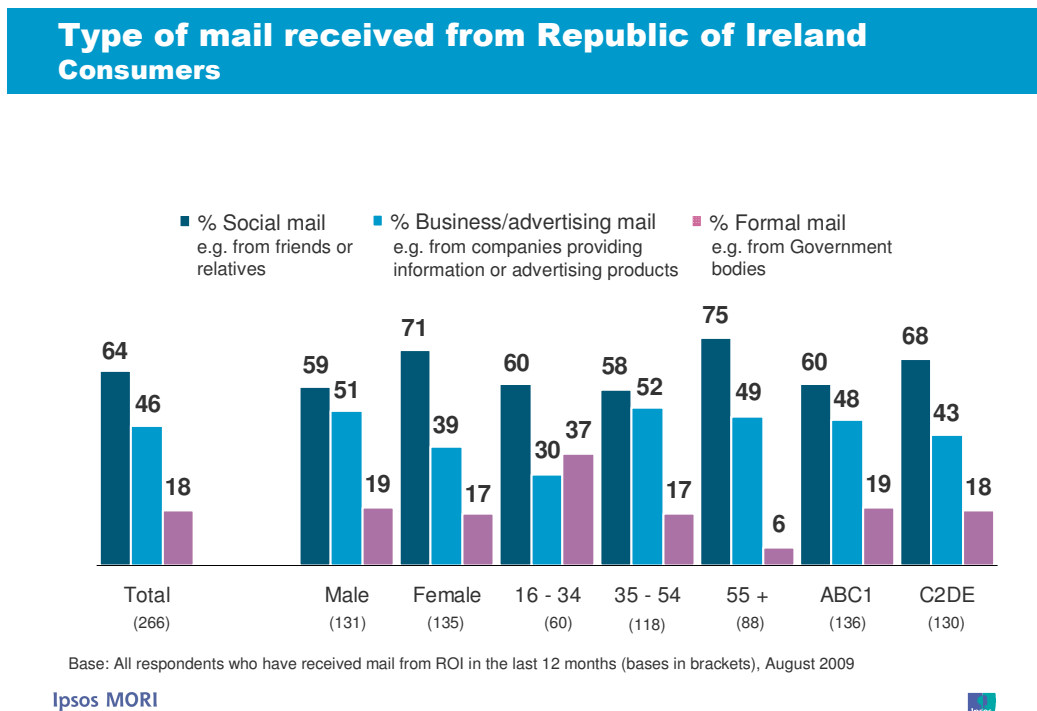


Source: Ipsos MORI

Levels of social mail are quite high with two in three of those who have received post from the Republic of Ireland in the last twelve months receiving letters from social contacts.

Women (71%) and those aged over 55 (75%) have significantly higher than average levels of receiving correspondence from social contacts in ROI.

Figure 8



Source: Ipsos MORI

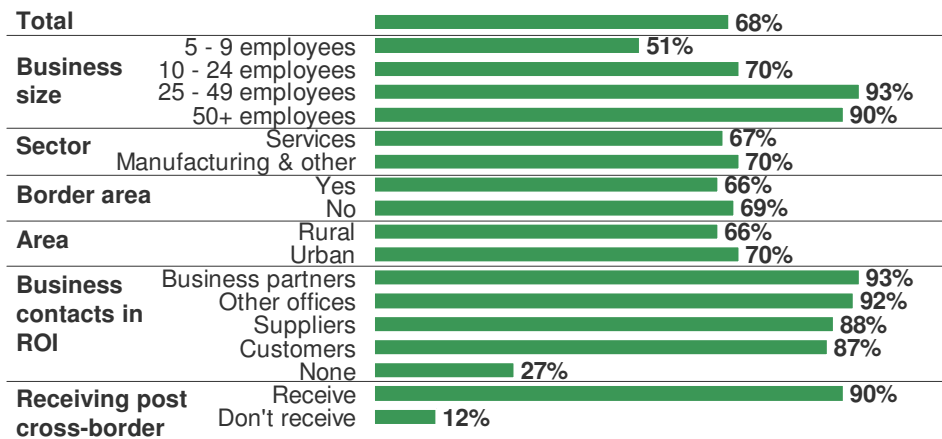
## 4.2 Businesses

### 4.2.1 Sending cross-border mail

Two in three (68%) SMEs in Northern Ireland surveyed send post to the Republic of Ireland. Unsurprisingly, larger businesses and those with working contacts in the Republic (i.e. customers, suppliers, business partners of other offices) send more post cross-border than those who do not.

Figure 9

### Breakdown of cross-border mail senders Businesses



Base: All SME businesses in Northern Ireland (200), August 2009

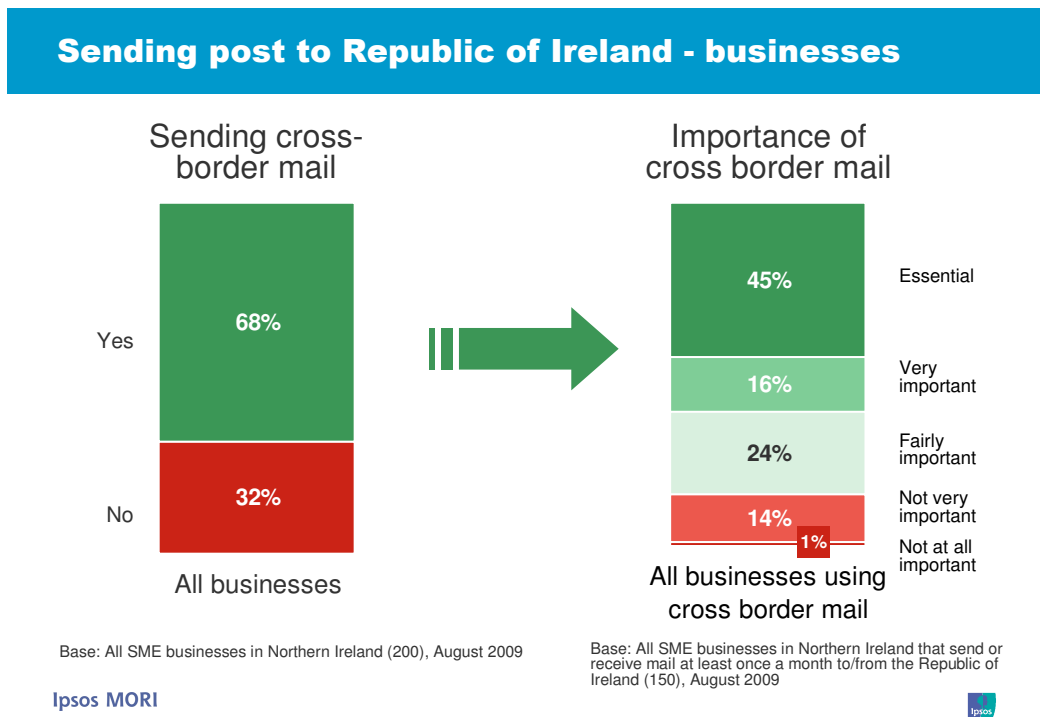
Ipsos MORI



Source: Ipsos MORI

Of SMEs that send or receive mail to the Republic of Ireland, the vast majority (85%) say that cross-border mail is at least fairly important to their business with almost half (45%) saying that it is essential. The importance of cross border mail grows among larger businesses (93% of businesses with more than 25 staff compared to 80% of businesses with fewer than 25 employees).

Figure 10



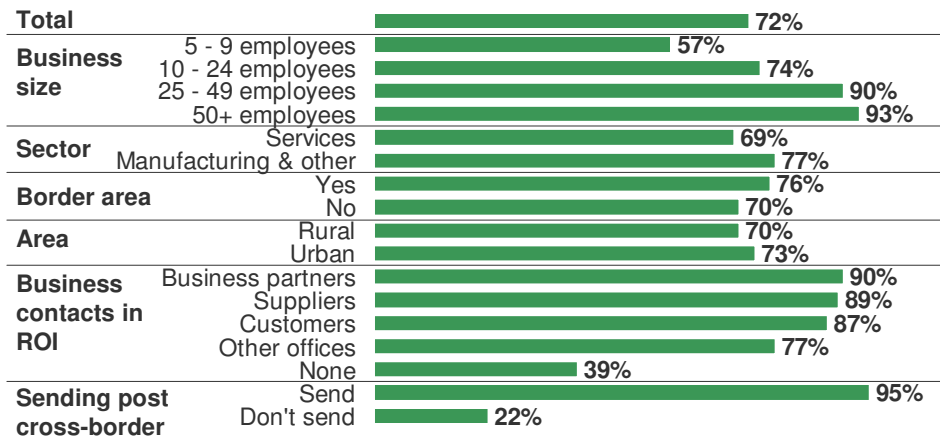
Source: Ipsos MORI

#### 4.2.2 Receiving cross-border mail

Almost three quarters of businesses in Northern Ireland send post cross-border, and as with consumers, receiving mail from the Republic is much higher among those who send mail to the Republic of Ireland. Larger businesses and those with business contacts in the Republic receive more cross-border mail.

Figure 11

## Breakdown of cross-border mail receivers Businesses



Base: All SME businesses in Northern Ireland (200), August 2009

Ipsos MORI



Source: Ipsos MORI

# **Royal Mail's overall performance**

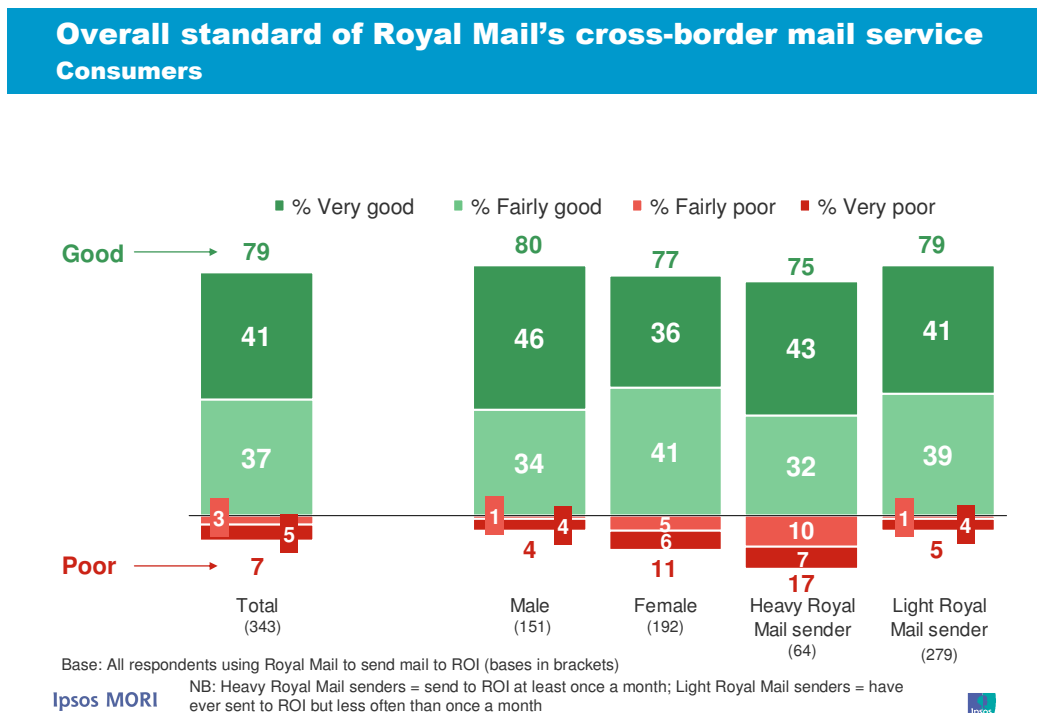
## 5. Royal Mail's overall performance

Satisfaction with Royal Mail's cross-border service is high among both consumers and businesses. There are no differences in perceptions of the service among those in urban and rural areas, nor are there differences by proximity to the border.

### 5.1 Consumers

Four in five (79%) residents in border areas who send post cross-border think that the service offered by Royal Mail is good. 7% regard the service as poor. Dissatisfaction increases among those who send cross-border more frequently (17% among those who send at least once a month versus 5% who send mail less often). This may be a reflection of the greater exposure that these individuals have to Royal Mail's service. Hence, the high levels of satisfaction overall are likely to be linked to the greater number of people who have less experience with Royal Mail's services.

Figure 12

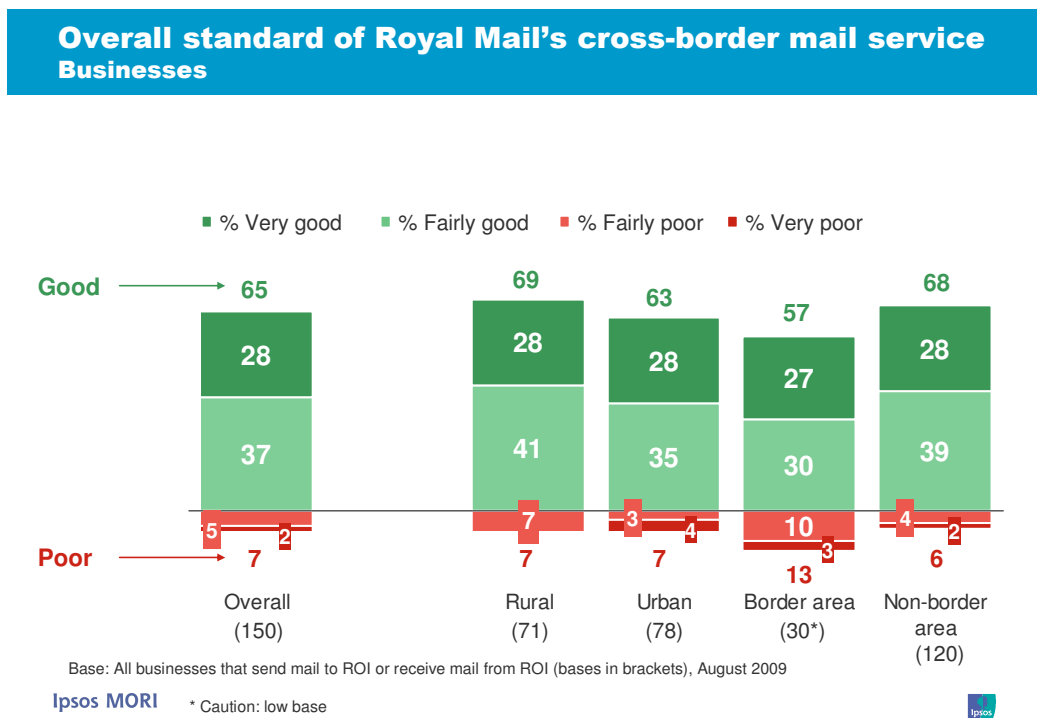


Source: Ipsos MORI

## 5.2 Businesses

Satisfaction with Royal Mail's cross-border service is lower among businesses than consumers with two in three (65%) businesses rating it as good and just over a quarter (28%) as very good.

Figure 13



Source: Ipsos MORI

While the ratings of Royal Mail's service are positive, the feedback from business representatives in the depth interviews was that Royal Mail offers a solid but not spectacular postal service from Northern Ireland to the Republic of Ireland:

**"It's just consistent, that's all. There's nothing outstanding about it"**  
*Male, Newry, Urban, 5 to 9 employees*

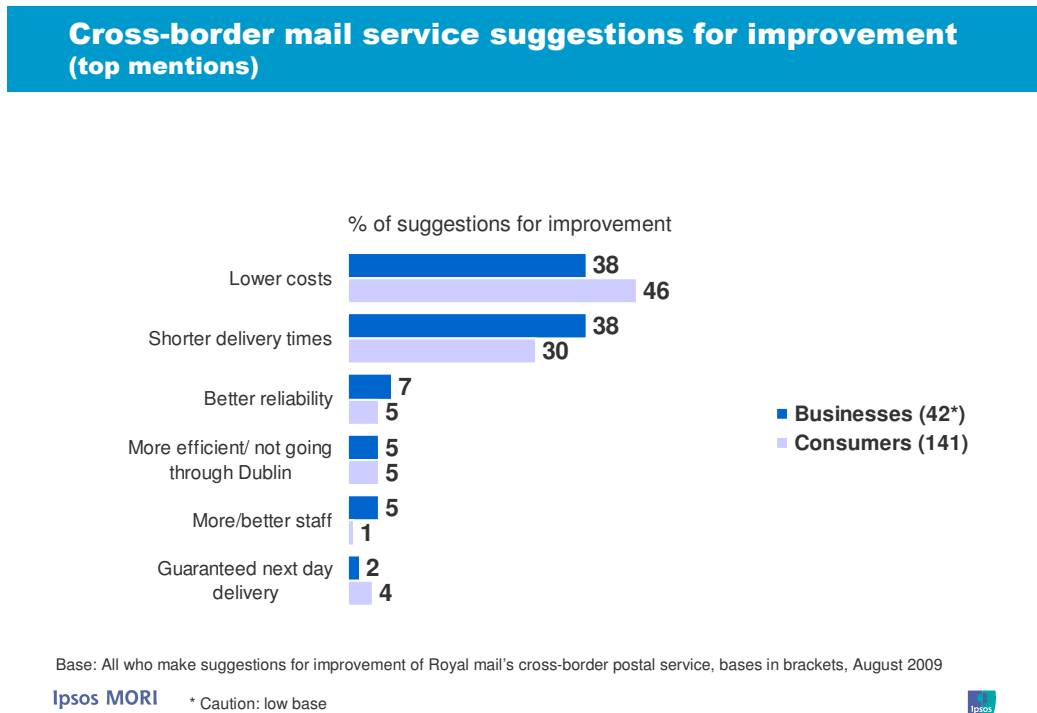
**"I've never come across a circumstance where their service or lack of service has caused me any issues"**  
*Male, Enniskillen, Rural, 5 to 9 employees*

In this sense, the positive ratings of the service are likely to be a consequence of the fact that Royal Mail offers a service that does not cause problems rather than being exceptional.

### 5.3 Areas for improvement

Of those that have given suggestions, cost and delivery time are the main areas of improvement for both consumers (46% and 30% respectively) and businesses (38% each). Reliability follows in third place mentioned by 7% of businesses and 5% of consumers who suggested an improvement.

Figure 14



Source: Ipsos MORI

Each of these three key aspects will be examined in the following chapters.

# Delivery time

## 6. Delivery time

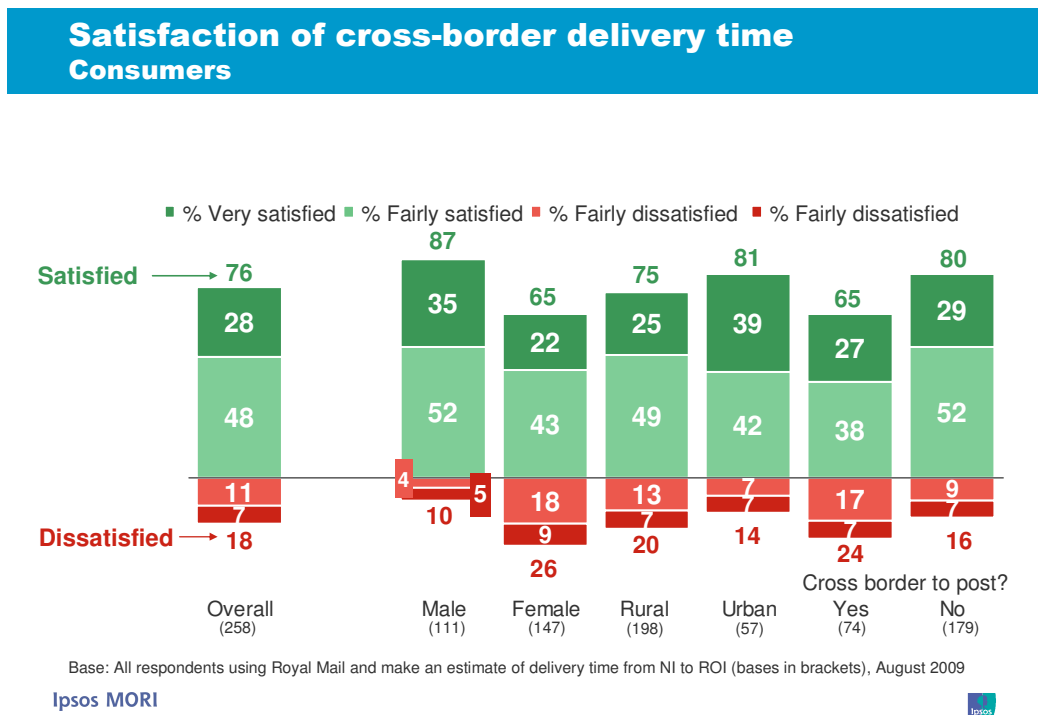
### 6.1 Satisfaction

#### 6.1.1 Consumers

Three in four (76%) consumers in border areas are satisfied with the delivery time of cross-border mail with 18% saying they are dissatisfied. There are no major differences in the satisfaction with delivery time among those living in urban or rural areas.

Those who have ever or would consider crossing the border to ROI for posting mail to the Republic have lower levels of satisfaction (65% versus 80%). This indicates that perceived slow delivery times are a key issue prompting people to cross the border to post mail.

Figure 15



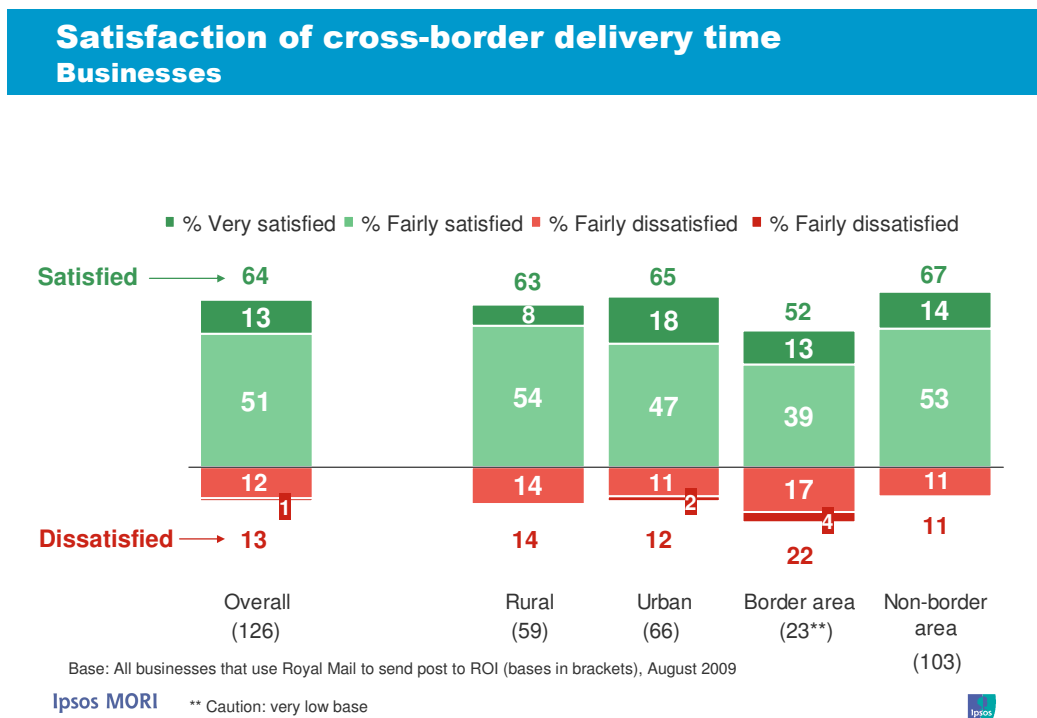
Source: Ipsos MORI

Women are also much less likely to be satisfied with the delivery time than men (65% compared to 87%).

### 6.1.2 Businesses

Levels of satisfaction with delivery time among businesses are lower than among consumers with two in three (64%) SMEs satisfied. There is an indication that those in border areas may be less likely to be satisfied with cross-border delivery time but given the low base sizes this can not be verified on a statistically valid basis. Those in urban areas and rural areas have very similar levels of satisfaction with the delivery time.

Figure 16



Source: Ipsos MORI

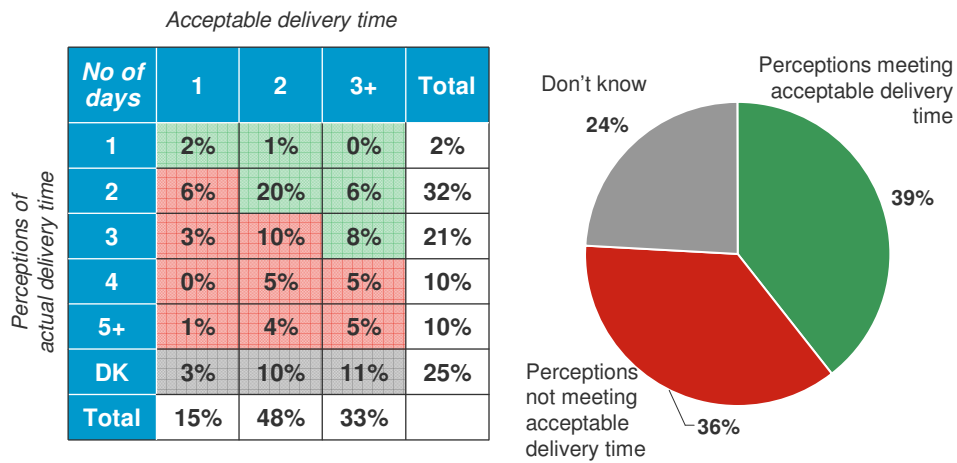
## 6.2 Perceptions and expectations

### 6.2.1 Consumers

Even though satisfaction with the delivery time is relatively high, there are differences between the perceived delivery time and what people regard as acceptable delivery times. For more than one third of the interviewed consumers in border areas (36%) the perceptions of how long it takes to send mail from Northern Ireland to the Republic of Ireland are not meeting what is regarded as an acceptable delivery time.

Figure 17

**Perceptions of delivery time vs. acceptable delivery time  
Consumers**



Base: All respondents using Royal Mail to send post to ROI (343), August 2009

Ipsos MORI



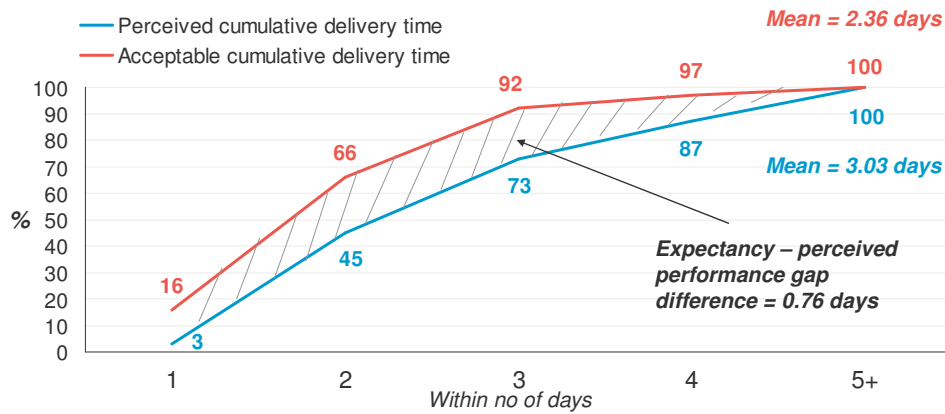
*E.g. 20% of those using Royal Mail to send post to ROI believe that mail arrives two days after posting and that two days is an acceptable delivery time.*

Source: Ipsos MORI

This can also be illustrated when plotting acceptable and perceived cumulative delivery times together. For example, 66% of Royal Mail users would accept two days for post to be delivered to the Republic compared to 45% who perceive that this is really the case.

Figure 18

**Perceived and acceptable delivery time  
Consumers**



Base (perceived delivery time): All respondents using Royal Mail to send post to ROI (343), August 2009  
Base (acceptable delivery time): All respondents (given whole interview) (444), August 2009

Ipsos MORI

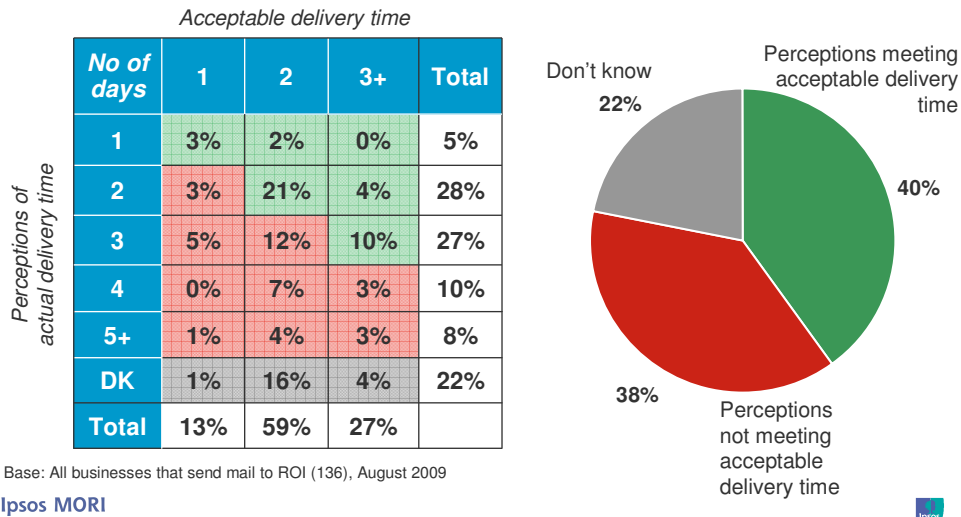


Source: Ipsos MORI

**6.2.2 Businesses**

Similarly to consumers, while perceptions of delivery time are meeting expectations for two in five (40%), for the same proportion (38%) the perceived delivery time exceeds what is acceptable.

## Perceptions of delivery time vs. acceptable delivery time Businesses



*E.g. 21% of businesses using Royal Mail to send post to ROI believe that mail arrives two days after posting and that two days is an acceptable delivery time.*

Source: Ipsos MORI

Slower than adequate delivery times is a theme which many respondents picked up in the depth interviews, even among businesses whose cross-border mail is generally not time-sensitive.

**"If it's taking on average four days for an invoice to get from us to them that's too long for me...you want it to flow a lot faster"**  
*Female, Armagh, Rural, 10 to 24 employees*

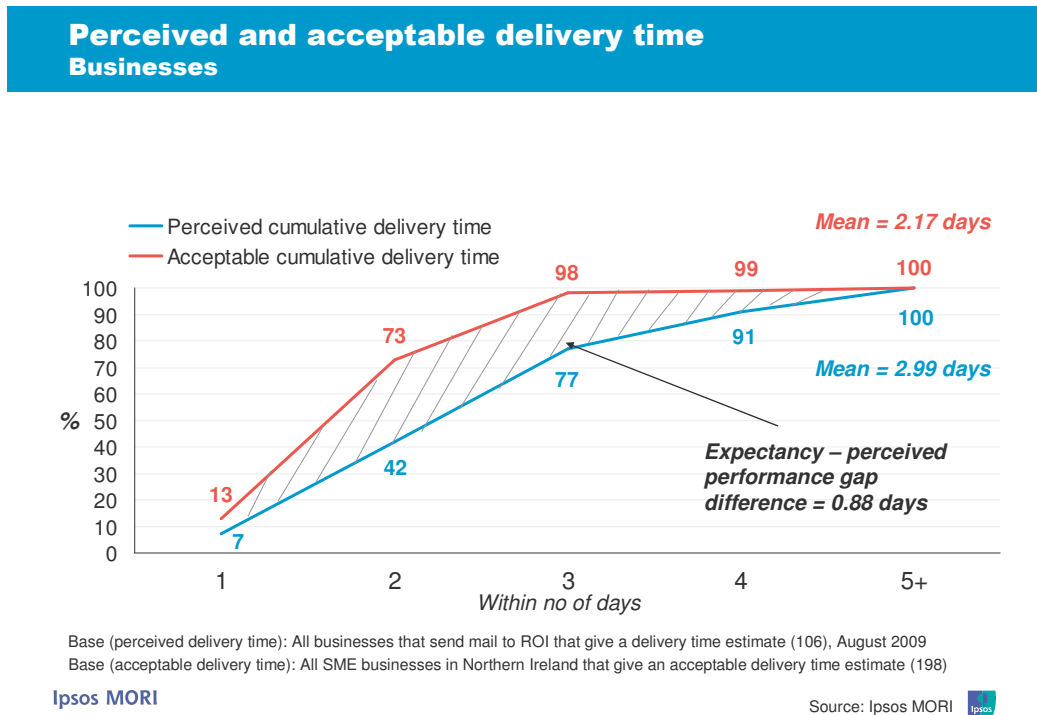
The expectations businesses have with regard to cross-border delivery times derive from comparisons with the intra-UK postal service. As such, some expect that mail within the island of Ireland should be delivered at least with the same speed as within the UK given the relative proximity of the destinations.

In the depth interviews, however, respondents attributed the perceived slow delivery times and delays usually to An Post rather than to Royal Mail.

**"Not sure who handles it down south but I know it is not the quickest"**  
*Male, Belfast, Urban, 50 to 99 employees*

As seen with consumers, there is a gap between what SMEs perceive as an acceptable delivery time and the time it actually takes. For almost three quarters (73%), two days would be acceptable, but only 42% perceive that Royal Mail delivers post cross-border within two days.

Figure 20



Source: Ipsos MORI

This gap between perceptions of performance and acceptable performance is greater among business representatives than consumers, which may be a reflection of how much more time critical post from businesses tends to be.

Many businesses are unclear of Royal Mail’s standards for delivery times for post being sent from Northern Ireland to the Republic of Ireland. Many of the interviewed SMEs would like to see the Royal Mail system within the UK mirrored for post being sent to the Republic with a choice of 1<sup>st</sup> or 2<sup>nd</sup> class postage that would give some indication of when postage should arrive at its destination.

**“You don’t really know how soon it is going to get there. There is no set standard, like 1<sup>st</sup> or 2<sup>nd</sup> class”**

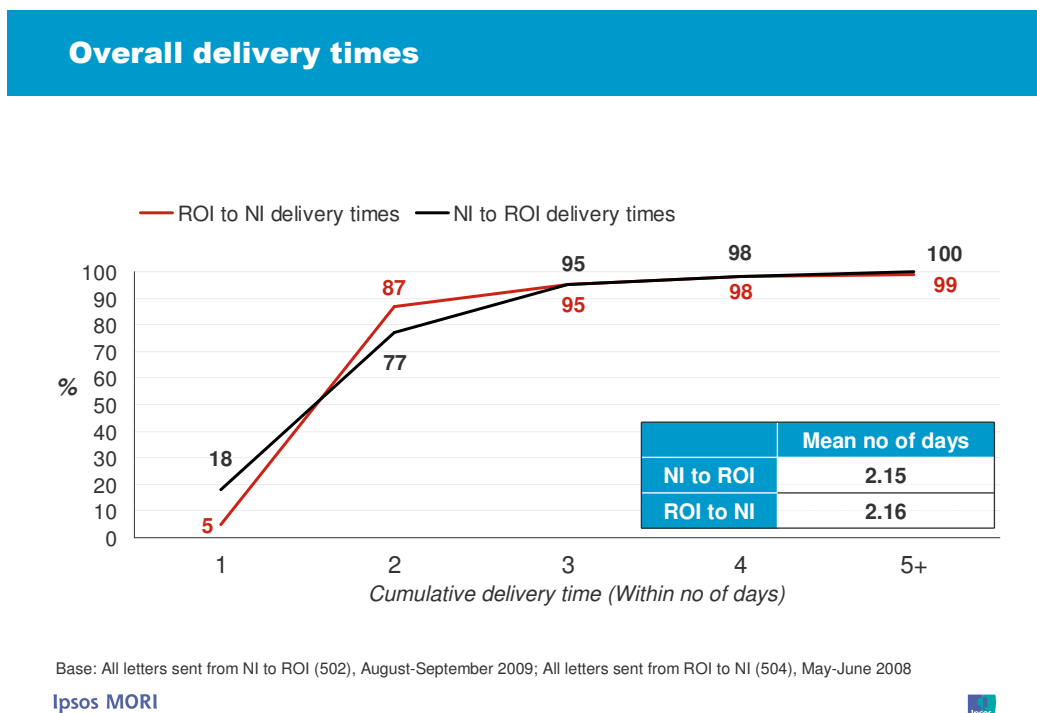
*Female, Newtownabbey, Urban, 10 to 24 employees*

### 6.3 Actual delivery time

The average delivery time for a standard letter posted from Northern Ireland to the Republic of Ireland is 2.15 weekdays. This is almost identical to the average delivery time in the opposite direction, as measured by Ipsos MORI in 2008 (2.16 weekdays).

The following chart illustrates the percentage of post delivered within five weekdays from postage:

Figure 21



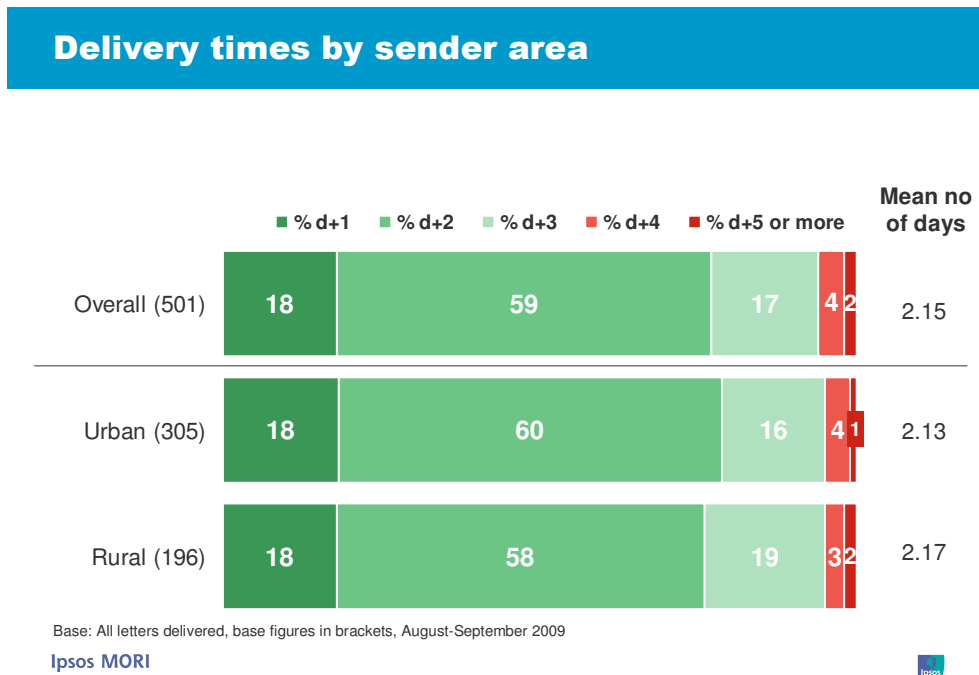
Source: Ipsos MORI

- 18% of mail is delivered on the next weekday;
- 77% is delivered within two weekdays;
- 95% is delivered within three weekdays.

While the average delivery time is the same for both routes NI to ROI and ROI to NI, more letters are received next day when sending from NI to ROI (18% versus 5%), whereas a greater proportion are received in the opposite direction within two days (77% from NI to ROI versus 87% from ROI to NI).

There are no significant differences between urban and rural areas as shown in the following chart.

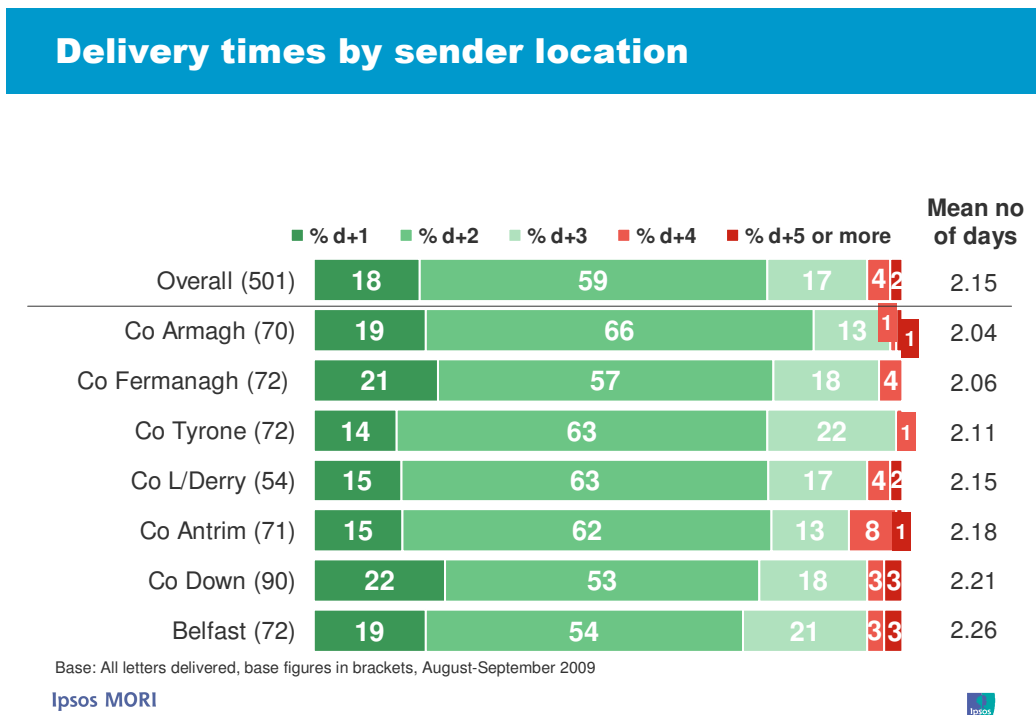
Figure 22



Source: Ipsos MORI

There is, however, some variation across the province in delivery time depending on location. The counties on the border (Armagh, Fermanagh, Tyrone and L/Derry) tend to have shorter delivery times than areas further from the border (Down, Antrim and Belfast).

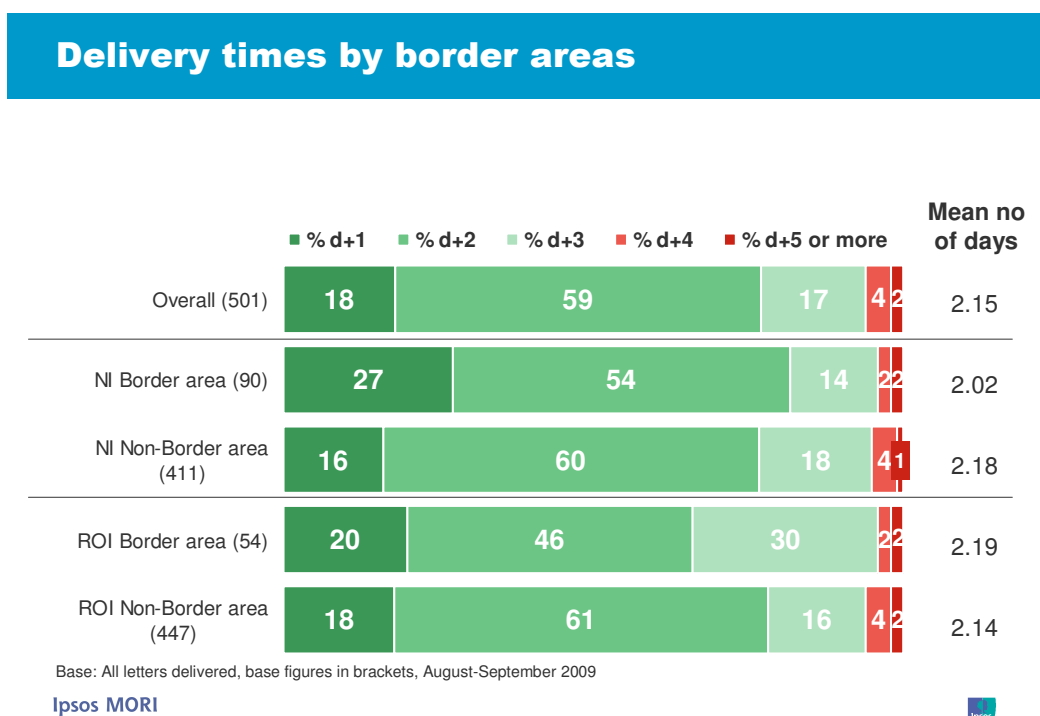
Figure 23



Source: Ipsos MORI

A greater proportion of letters sent from the border areas are received in the Republic of Ireland in the next weekday (27% compared to 16% of non-border areas).

Figure 24

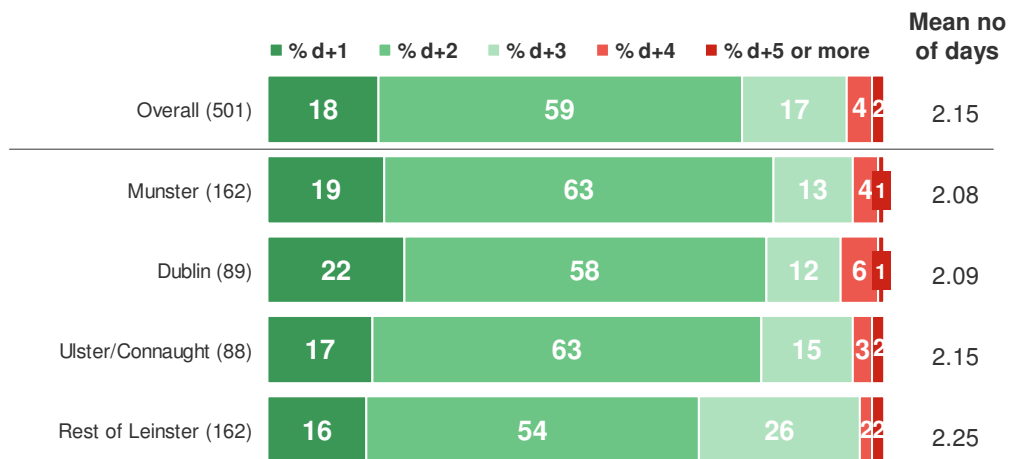


Source: Ipsos MORI

The same pattern, however, is not reflected in the Republic of Ireland, as those further away from the border tend to get a better service from An Post; Dublin and Munster have the quickest delivery times.

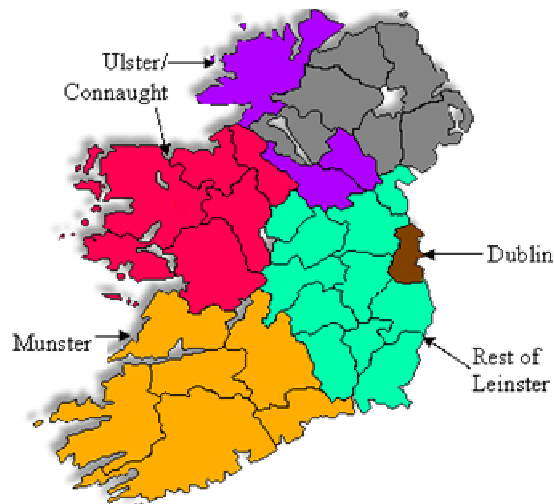
Figure 25

## Delivery times by receiver location



Base: All letters delivered, base figures in brackets, August-September 2009

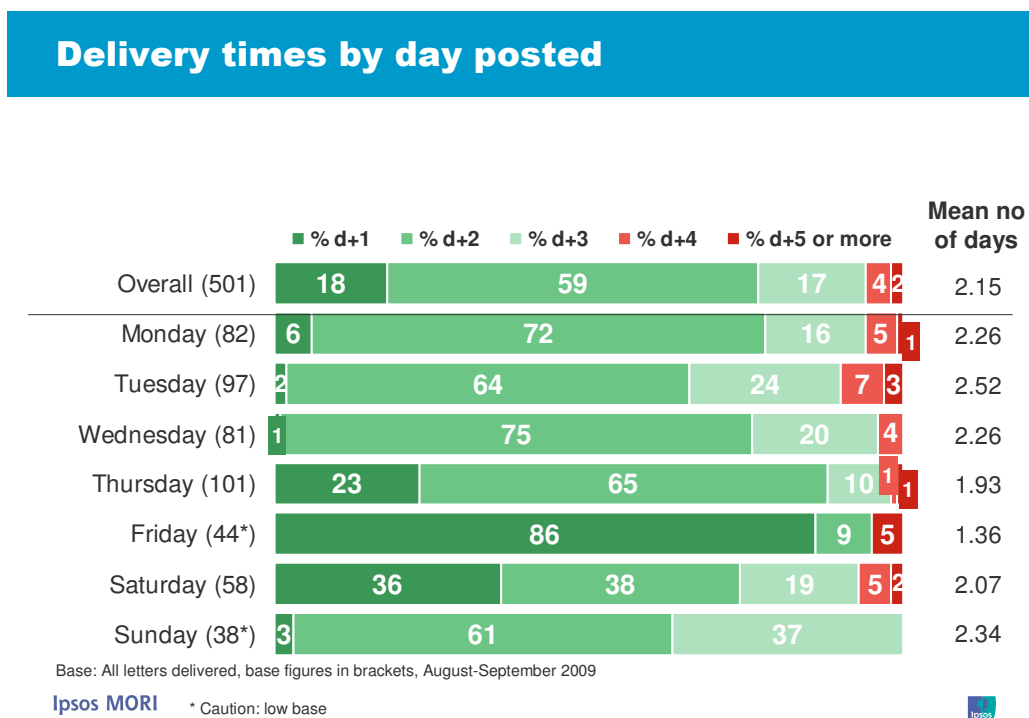
Ipsos MORI



Source: Ipsos MORI

The main factor explaining the variation of delivery time is the day posted. Post items sent on Thursday, Friday and Saturday have quicker delivery times than average. In particular, post sent on Fridays is more likely to reach its destination on the next weekday (86% compared with 18% overall). This is perhaps unsurprising in light of the fact that there are collections Saturdays in Northern Ireland and no weekend deliveries in the Republic of Ireland at this time of the year.

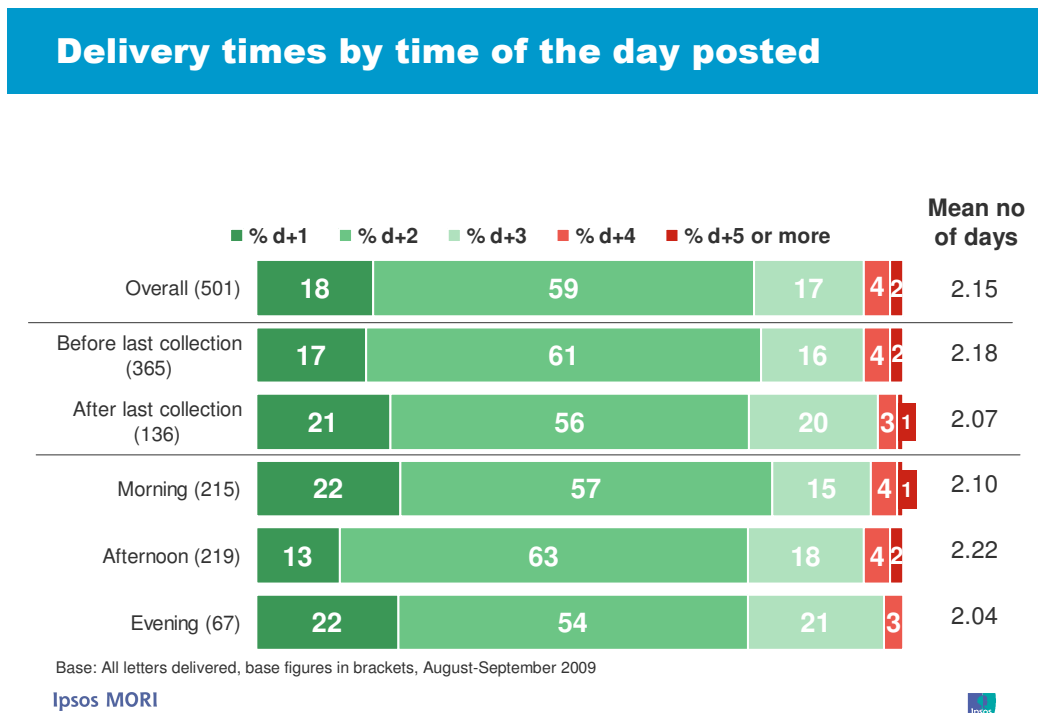
Figure 26



Source: Ipsos MORI

As expected, there is also some variation in delivery times depending on the time of the day post is sent. Post sent in the morning is significantly more likely to reach its destination by the next day than post sent in the afternoon (22% compared to 13%).

Figure 27

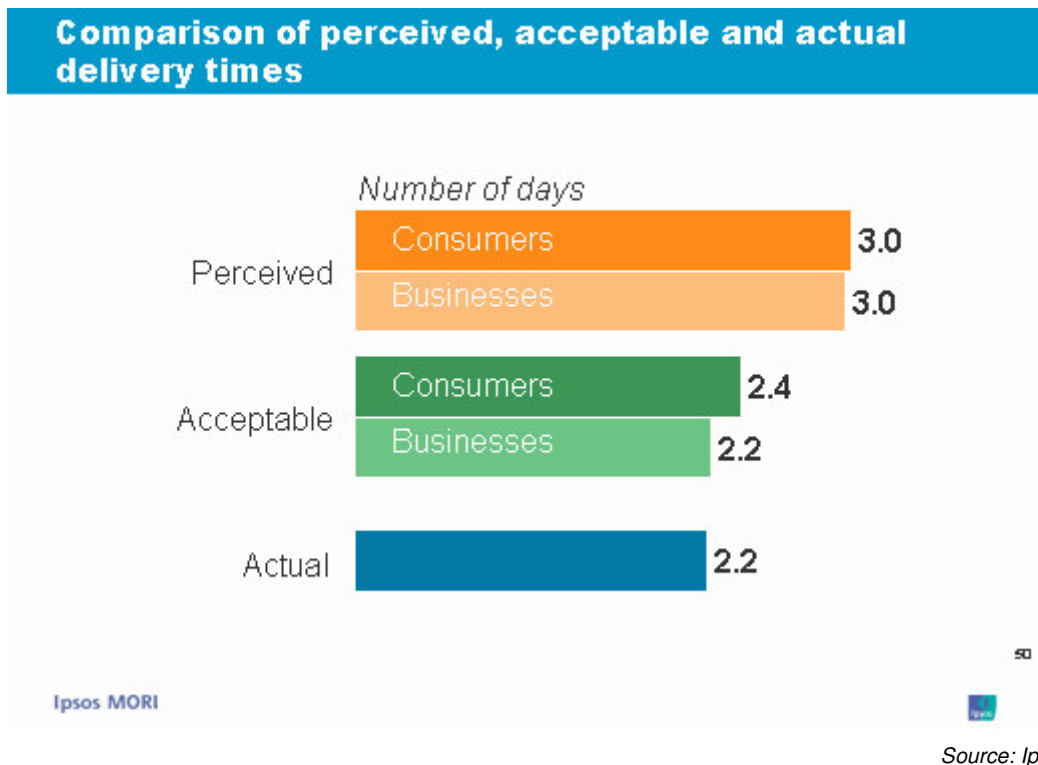


Source: Ipsos MORI

## 6.4 Actual delivery time vs. perceived and acceptable delivery times

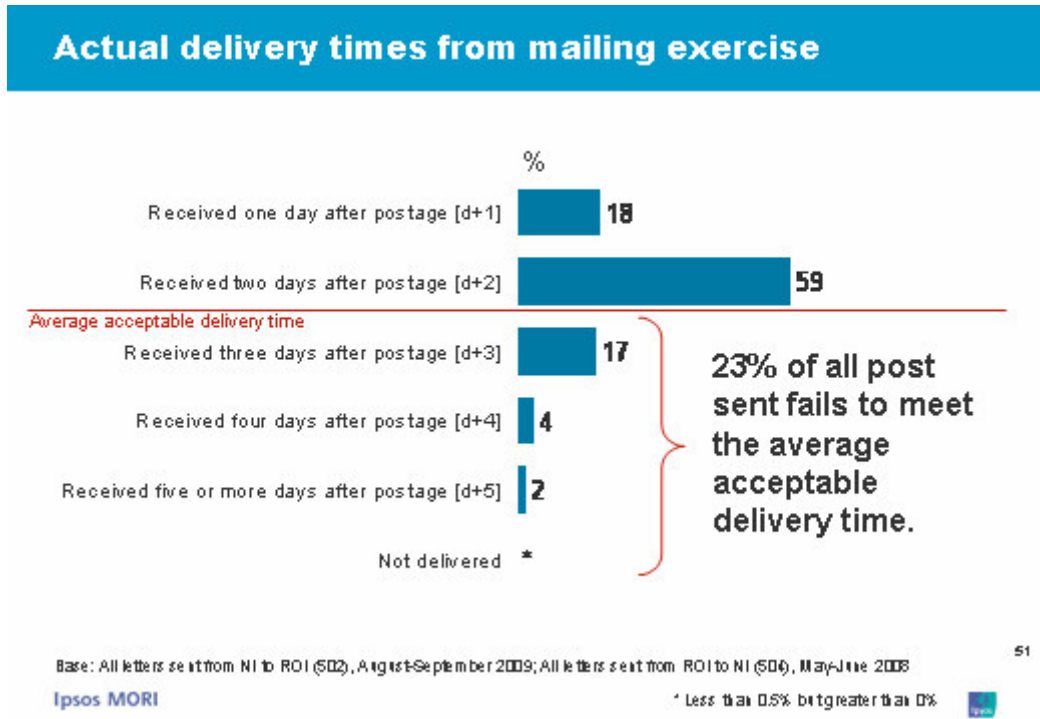
On average, the actual delivery time (average of 2.2 days) is not only quicker than what consumers and businesses perceive as usual delivery time but also quicker than what is stated to be acceptable.

Figure 28



However, while the average delivery time meets what is stated to be acceptable on average, 23% of post sent from Northern Ireland to the Republic of Ireland does not meet the average acceptable delivery time, as shown in the following chart.

Figure 29



Source: Ipsos MORI

# **Cost and perceived value for money**

## 7. Cost and perceived value for money

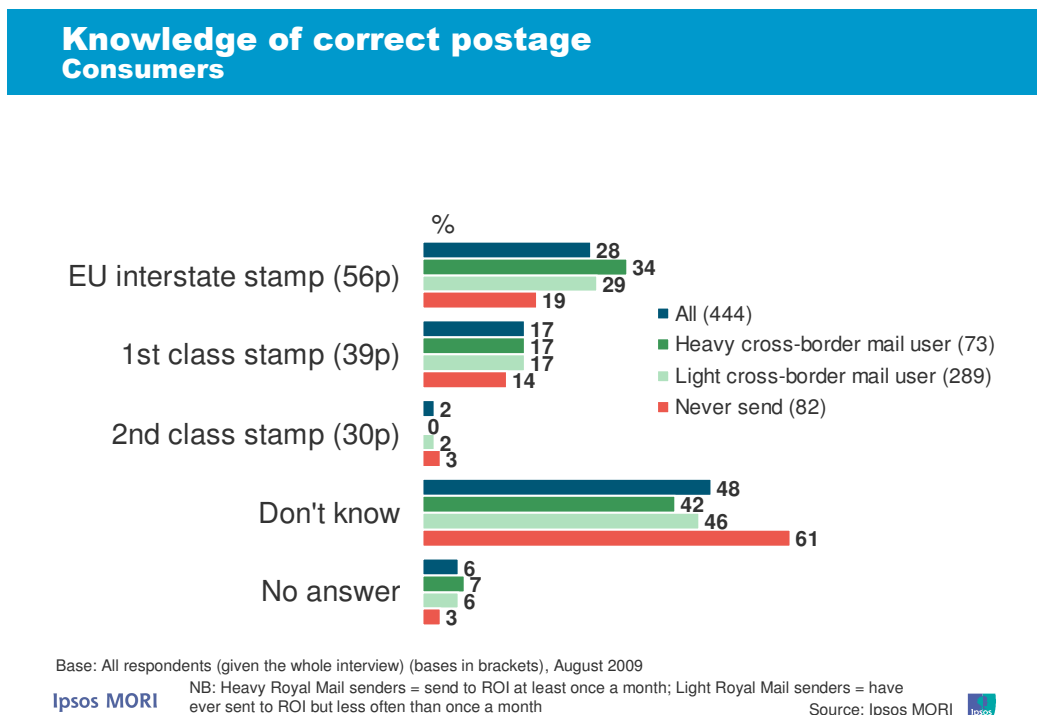
### 7.1 Knowledge of correct postage

Awareness of the need to use an EU interstate stamp when sending mail to the Republic of Ireland is low, especially among consumers. Only one quarter of residents in border areas and half of businesses are aware that an EU interstate stamp is required to send post from Northern Ireland to the Republic of Ireland.

#### 7.1.1 Consumers

Among residents, almost half (48%) do not know that an EU stamp is required for sending mail to the Republic. Cross-border mail senders, even those who send post cross-border regularly are no more likely to be sure about the correct postage to send mail to the Republic of Ireland. Interestingly, knowledge about the correct postage is equally low among those who normally use pre-bought stamps (30% know the correct postage) suggesting that a large proportion potentially use the wrong postage for sending cross-border mail.

Figure 30

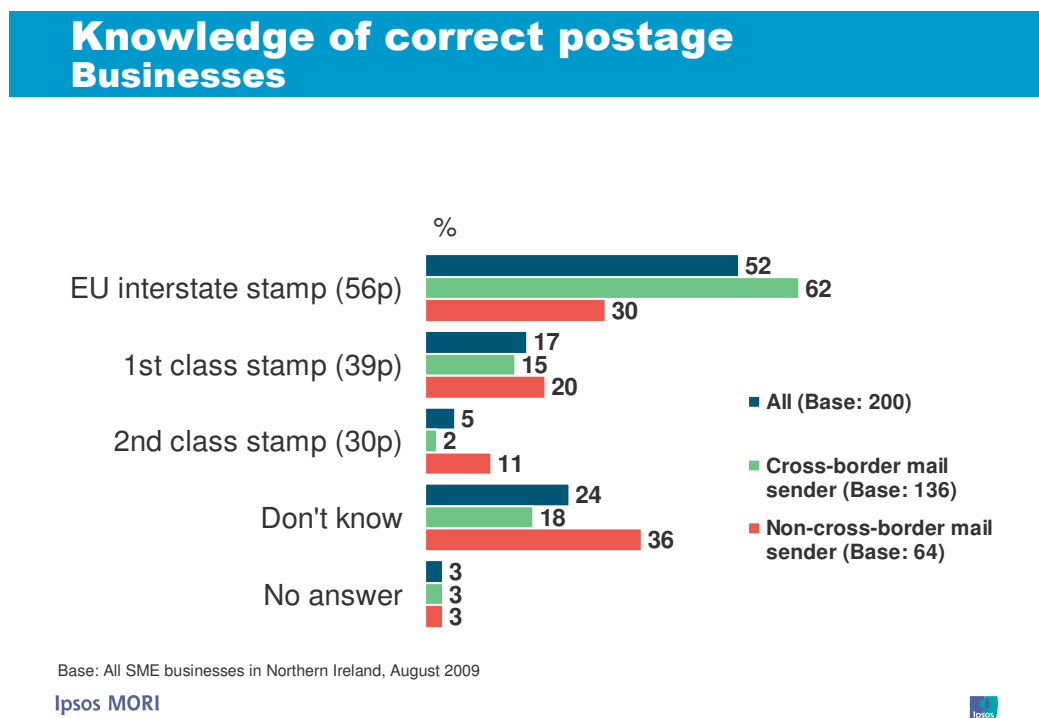


Source: Ipsos MORI

## 7.1.2 Businesses

Awareness of the correct postage is higher among businesses (52% versus 28% among consumers), and stands at 62% among businesses that use Royal Mail for posting across the border. Nonetheless, one quarter (24%) of businesses do not know the correct form of postage to use and this is higher among smaller businesses (28% of businesses with fewer than 25 employees compared to 15% of businesses with more than 25 staff).

Figure 31



Source: Ipsos MORI

## 7.2 Perceived value for money

Among the analysed performance dimensions, value for money is the weakest aspect of Royal Mail's performance. This is strongly linked to the fact that only 11% of consumers feel there is justification for higher prices for posting to the Republic than within the UK.

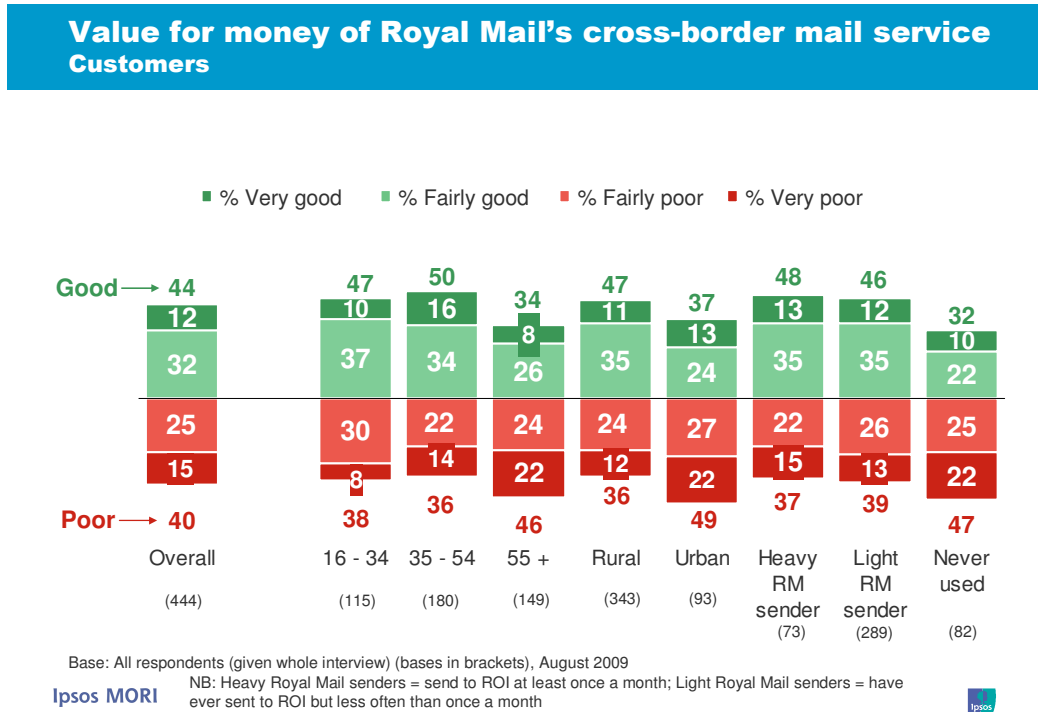
Businesses, however, have a more positive opinion about the value for money offered by Royal Mail.

### 7.2.1 Consumers

Two in five consumers in border areas think that the value for money of sending post cross-border using Royal Mail is good (44%) but a similar proportion rate it as poor (40%). The

lowest levels of satisfaction are among people living in urban areas (49%), those aged over 55 (46%) and those who have never used Royal Mail's service (47%).

Figure 32



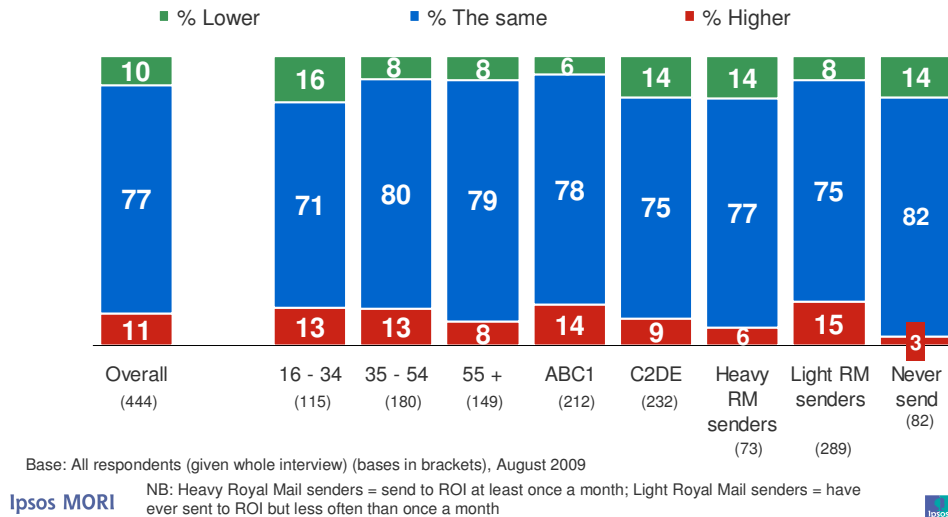
Source: Ipsos MORI

Only one in ten consumers (11%) think that the costs for sending post from Northern Ireland to the Republic of Ireland should be higher than sending from Northern Ireland to elsewhere in the UK, as is presently the case. Only 3% of those who have never used Royal Mail to send post to the Republic of Ireland say that the costs should be higher.

The majority (77%) feel that the cost should be the same for sending post to the two jurisdictions, with one in ten (10%) thinking that it should be lower.

Figure 33

### How costs of sending post to ROI should compare to sending within the UK



Source: Ipsos MORI

## 7.2.2 Businesses

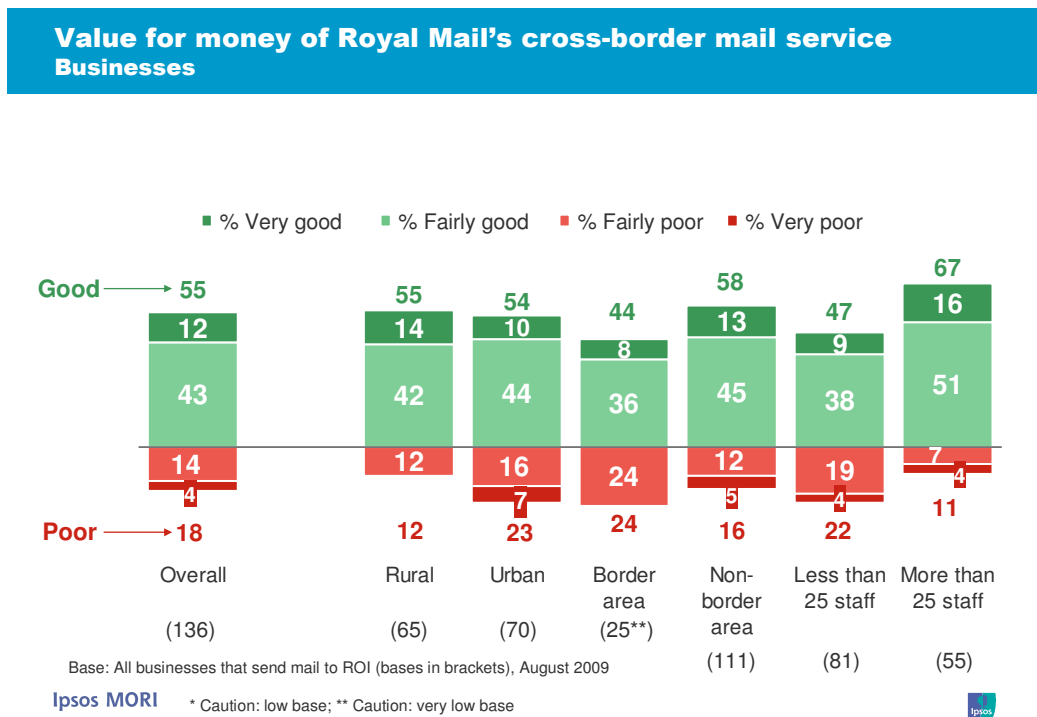
More than half (55%) of businesses rate the value for money of the cross-border service offered by Royal Mail as good. Larger businesses are more satisfied with the value for money than smaller businesses (67% compared to 47%).

A common theme in the depth interviews was that higher costs are acceptable given the solid, generally reliable service which is not posing too many problems. However, one in five (18%) businesses rate the value for money of the service as poor, mainly because Royal Mail's cross-border service is regarded more expensive than the intra-UK postal service and does not deliver post as quickly:

**"The cost shouldn't be as wide as it is for the service you are getting...there is at least a 35% higher charge so you wouldn't expect 2nd class delivery which is probably currently what they are achieving"**

*Male, Enniskillen, Rural, 5 to 9 employees*

Figure 34



Source: Ipsos MORI

As with consumers, several business representatives feel that the cost for sending a standard letter to the Republic of Ireland is expensive. While the cost does not necessarily represent a huge problem for those who have small volumes of post, some do not see the justification for spending more to post to the Republic of Ireland than to other parts of the UK given the distance between the two countries:

**"It's always been the case that it's more expensive [to send to ROI]...if you're only sending a few a week you're not too worried about value for money"**  
Male, Belfast, Urban, 10 to 24 employees

**"Cost is the biggest problem. We're so close to each other you wonder what is the point...it probably costs as much to drive and deliver it"**  
Female, Newtownabbey, Urban, 10 to 24 employees

**"It's a bit strange - you would think it would be easier to transport an envelope from Portglenone to Dublin than it would be to transport an envelope from Portglenone to London"**  
Female, Ballymena, Rural, 5 to 9 employees

Several business representatives questioned the fact that it costs the same to send post to the Republic of Ireland as sending post to continental Europe, yet the modes of transport involved in delivering the post differ. Given that mail is transported via road rather than air mail, some feel that the current price of 56p is not justified.

**"There's no comparison in those costs [air travel and road travel] but yet it's not taken into consideration in the postal service"**

*Female, Armagh, Rural, 10 to 24 employees*

**"I can't see why it should cost more to the south than Scotland for example. You have to go over the water to get to Scotland whereas it's just road transport down to the south"**

*Male, Newry, Urban, 5 to 9 employees*

In saying this, there is an understanding among businesses that post is handled by two separate companies – Royal Mail and An Post – and that one would expect extra costs to be incurred for this reason. Hence, several suggested that a harmonised all-Ireland rate should be implemented which should be more competitively priced than the EU rate. A small number of businesses say that their cross-border post usage would possibly increase if costs were brought to this level.

**"Probably as a company we would [send more post if costs were brought down]. At the minute we do look for other ways [to save money]. We really only post what is necessary to post...but it would be better to send people original documents"**

*Female, Limavady, Rural, 10 to 24 employees*

# Reliability and its perception

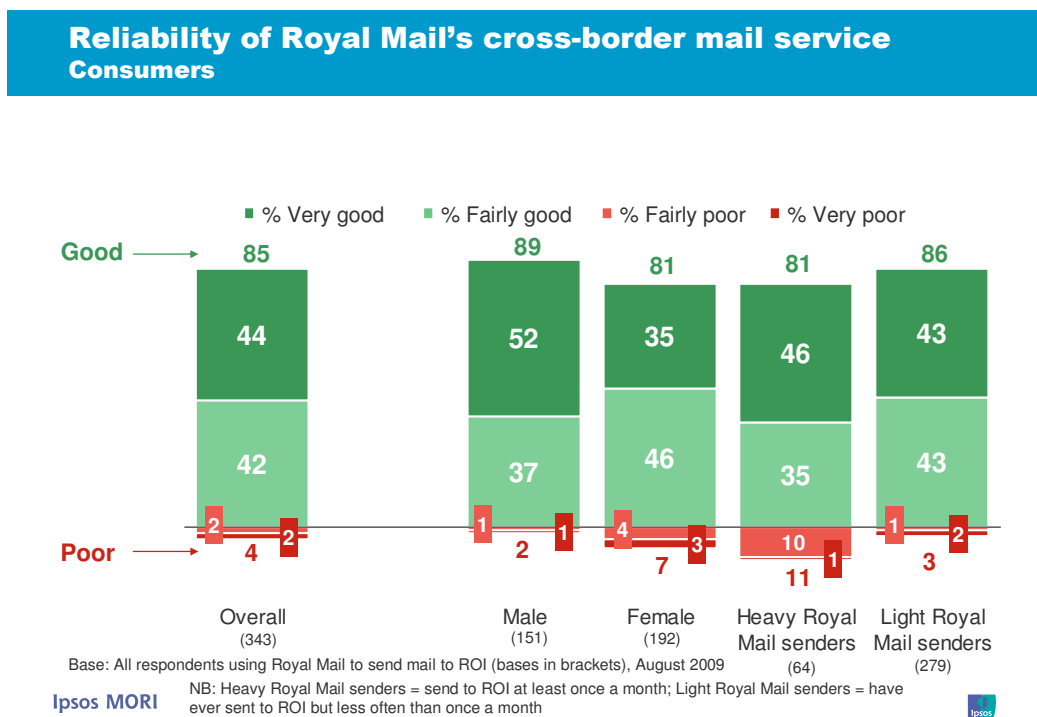
## 8. Reliability and its perception

Reliability of Royal Mail’s cross-border service is generally rated positively among consumers and businesses, but instances of items of mail being “lost in the post” are costly in terms of trust in the service.

### 8.1 Consumer

For consumers, the majority (85%) are satisfied with the reliability of the Royal Mail cross-border service. Only 4% rate the reliability of the service as poor but this increases to 11% among heavy mail senders. Again, there are slight indications to suggest that those who send mail more frequently and have a greater exposure to the service are more likely to have experienced reliability issues.

Figure 35



Source: Ipsos MORI

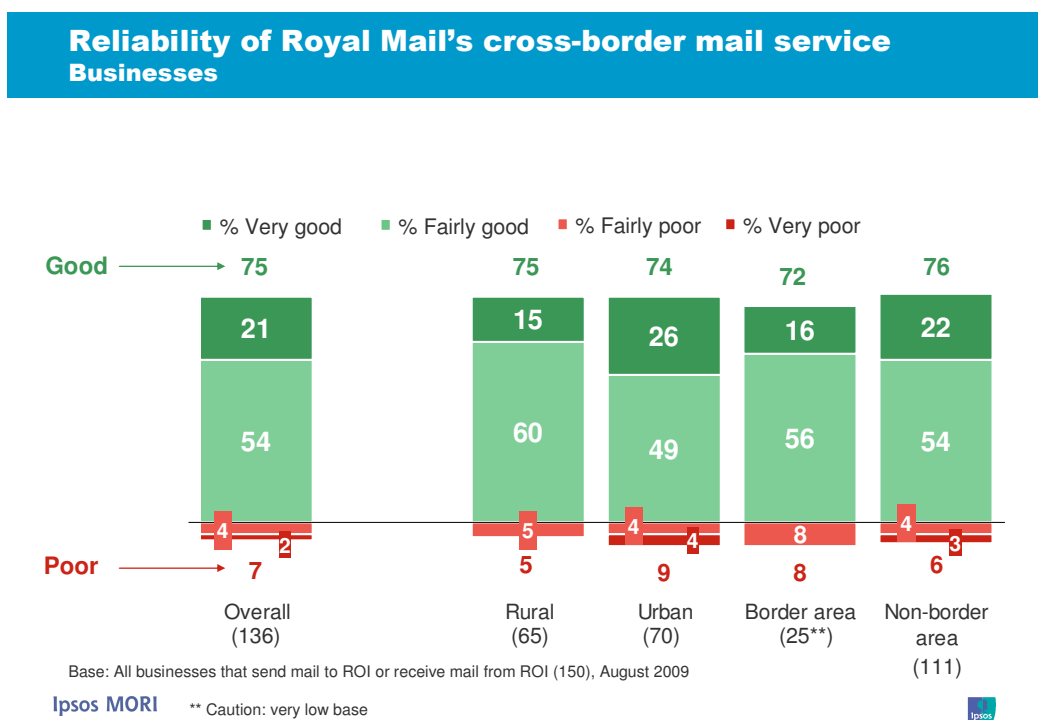
## 8.2 Businesses

Reliability of the cross-border service among businesses is not rated as well as among consumers, but still three in four (75%) state that Royal Mail offers a reliable cross-border service.

**"The reliability is good as the customer does get it, albeit slow... Rarely would have to resend something to the Republic whereas when sending to Europe we would have to resend post on a regular basis."**

*Female, Armagh, Rural, 10 to 24 employees*

Figure 36



Source: Ipsos MORI

Only 7% think that the reliability is poor. There are no differences in views of the reliability of the service among businesses in urban or rural areas or in border areas. However, some businesses have experienced post going missing en route, and this has occurred on several occasions in a small number of cases. For most there is a concern that post which doesn't arrive at its destination in the Republic of Ireland reflects badly on the company:

**"It does put you off a bit...it can make you look bad from a business point of view"**

*Female, Ballymena, Rural, 5 to 9 employees*

**"That sort of thing gets a bit embarrassing because it looks like you haven't posted it"**

*Male, L/Derry, Urban, 10 to 24 employees*

However, the bigger concern for businesses is the inconsistency of delivery times and not knowing when to expect something to arrive in the Republic of Ireland that makes it difficult to rely on the cross-border service. For this reason, in circumstances where something important or urgent needs to be sent to the Republic, some businesses have taken alternative means to ensure that it reaches its destination in time.

**"If we have something to go in for a deadline, we'd just drive up with it. I wouldn't trust putting it in the post."**

*Male, Newry, Rural, 25 to 49 employees*

Even though there is a need for recorded delivery services to the Republic of Ireland, awareness of the International Signed For and Airsure services is very low. There is however some interest in using these services for items of post where reassurance of reliability is necessary but usage of these services would strongly depend on cost.

# **Alternatives to cross-border post**

# 9. Alternatives to cross-border post

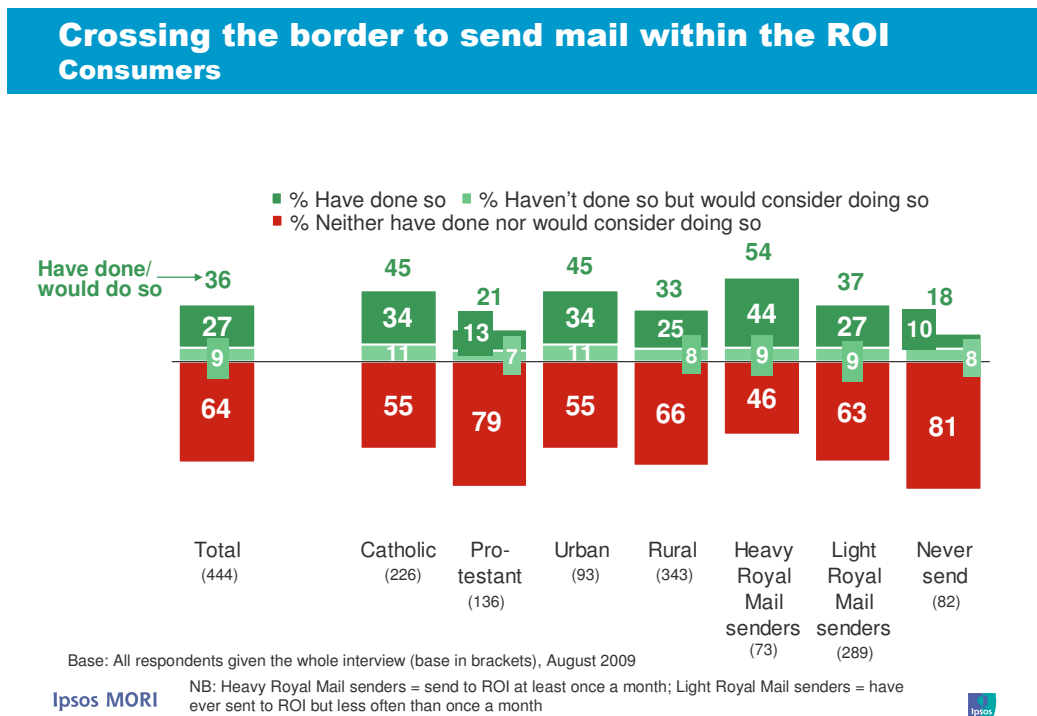
## 9.1 Crossing the border

Rather than using the Royal Mail cross-border service, a sizeable proportion of both consumers in border areas and businesses are crossing the border and sending post going to the Republic of Ireland from a post box or post office in ROI.

### 9.1.1 Consumers

Just over one in four (27%) consumers living in border areas say they have ever crossed the border to send mail to the Republic of Ireland within ROI. Those who use Royal Mail at least once a month for sending post to the Republic are most likely to cross the border for posting from ROI, with 44% of this group already having done so.

Figure 37



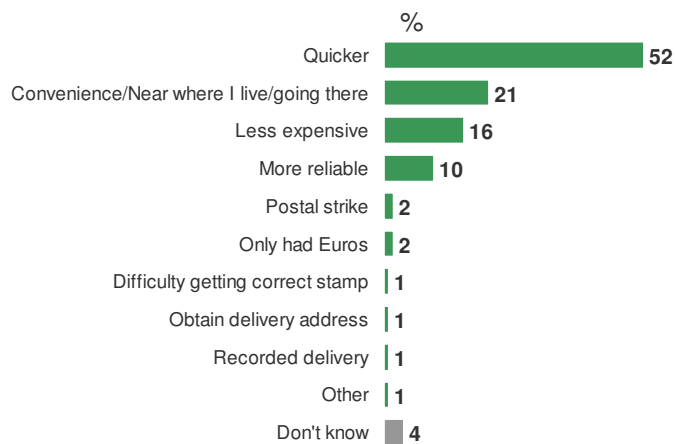
Source: Ipsos MORI

Moreover, a further 9% say that they would consider crossing the border to send mail within the Republic even though they haven't done so already. Overall more than one third of those in border areas say they have crossed the border or would consider doing so meaning that it is a viable alternative to Royal Mail for these individuals.

The perception that post reaches its destination quicker by posting in the Republic is the main reason why people have or would cross the border to post mail to the Republic of Ireland (52%), followed by convenience (21%) and that it is less expensive (16%).

Figure 38

### Reasons for taking mail across the border to post



Base: All who have taken or would take mail across the border to post (159), August 2009

Ipsos MORI



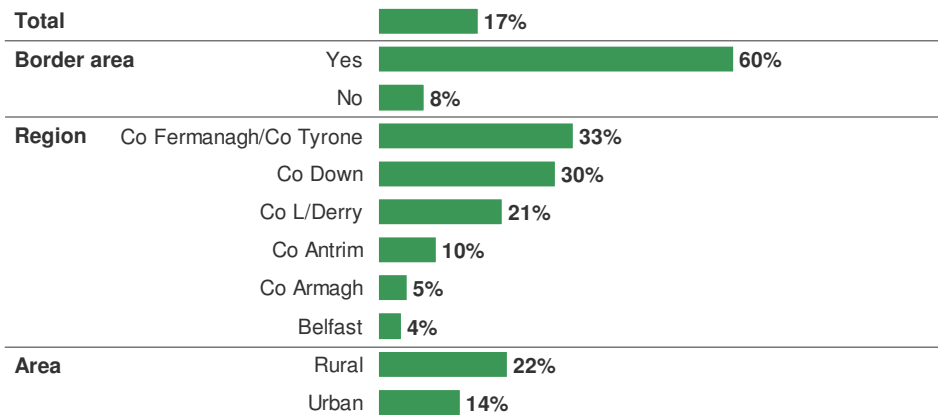
Source: Ipsos MORI

### 9.1.2 Businesses

About one in six (17%) businesses in Northern Ireland have crossed the border to send business post to ROI. Unsurprisingly incidence of crossing the border is higher among businesses close to the border (60%), especially among those located in counties Tyrone, Fermanagh and Down.

Figure 39

### Crossing the border to send mail within the ROI Businesses



Base: All businesses that have customers/suppliers/other business partners/offices in ROI (144), August 2009

Ipsos MORI



Source: Ipsos MORI

As with consumers, convenience (especially for those based near the border), lower costs, perceived improvements in delivery time and reliability are the main reasons for crossing the border to post mail. Of those businesses that do not currently cross the border to send mail, some close to the border would consider it if it provided a cost benefit. There is a perception that crossing the border is the only true alternative to Royal Mail's service in terms of cross-border post, and that there is a lack of competition:

**"I don't have to make a lot of effort to make this saving...if it was closer, like 5% I probably wouldn't bother"**

*Male, Newry, Urban, 5 to 9 employees*

**"All they [Royal Mail] are competing against is those people delivering directly to a post office in the Republic of Ireland...the service they are offering needs to be competitively priced against the actual posting in the Republic of Ireland."**

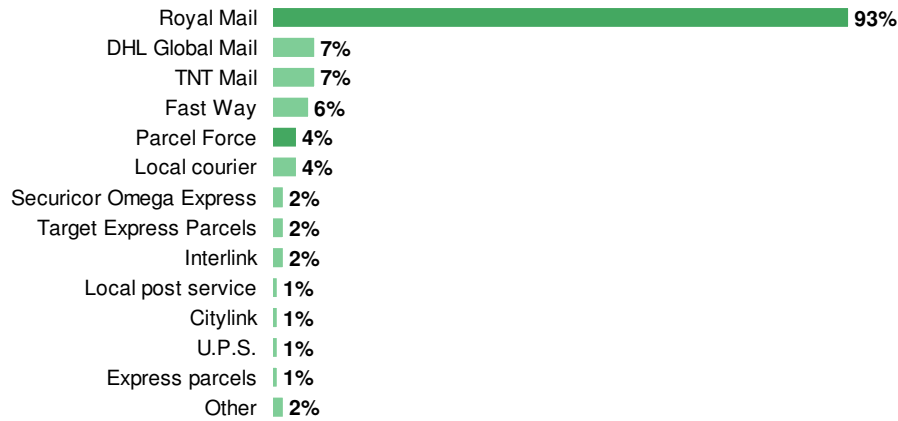
*Male, Carrickfergus, Urban, 5 to 9 employees*

## 9.2 Couriers

The vast majority of businesses in Northern Ireland rely on Royal Mail for sending post to the Republic (92%). Three in ten (29%) use alternative courier services to Royal Mail. DHL, TNT and Fast Way are the main companies used.

Figure 40

## Mail suppliers used for sending mail to ROI



Base: All SME businesses in NI sending mail to ROI (136)

Ipsos MORI



Source: Ipsos MORI

Again, speed and guaranteed delivery are the main reasons for using couriers rather than Royal Mail's postal service, in addition to the ability to send large and sensitive material securely. Businesses acknowledge that it is more expensive to hire a courier but is worth the extra money in some cases due to the 'peace of mind' that this provides in regard to delivery.

### 9.3 Sending information electronically

While electronic means of sending information to customers and suppliers in ROI is widely used, it is still important for some businesses to send certain documents as hard copy, for example, invoices or statements. However, there is a general trend of substituting traditional mail by email as this is perceived to be more efficient, especially as more customers are able to receive information and can be targeted by electronic means.

# Appendices

# 10. Appendices

## 10.1 Consumer questionnaire

Good morning/afternoon/evening. My name is.....from Ipsos MORI. We are conducting a survey on behalf of Consumer Focus Post, a statutory organisation campaigning for a fair deal for consumers of postal services in Northern Ireland.

Your answers will help to assess and improve the quality and value for money of postal services. It will only take about 10 minutes and all of your responses will be treated anonymously and will remain confidential.

In order that we interview a good cross-section of the public and people from all walks of life I would like to ask you a few questions about yourself.

Q1 Could you please tell me your age at your last birthday?  
INTERVIEWER: Code exact age.

years	16....100
Refused	

IF REFUSED AGE, PROBE TO AGE GROUPS.

Q1b

1	16 – 24	<b>QUOTA CONTROL</b>
2	25 – 34	
3	35 – 44	<b>QUOTA CONTROL</b>
4	45 – 54	
5	55 – 64	<b>QUOTA CONTROL</b>
6	65 +	

Q2 **DO NOT ASK CODE FROM VOICE**

1	Male	<b>QUOTA CONTROL</b>
2	Female	<b>QUOTA CONTROL</b>

Thank you. The main purpose of this research is to assess mail services to the Republic of Ireland. May I ask ...

Q4 How often do you send letters or other mail to the Republic of Ireland? **PROBE TO PRECODES**

1	At least once a week	Continue
2	Less than once a week, but more than once a month	
3	Less than once a month, but more than once a year	
4	Once a year or less often	
5	Never	Continue for every 3 <sup>rd</sup> interview Otherwise, go to Q20

IF MAIL SENDER (CODES 1-4 IN Q4)

Q5 When you send letters or other mail to the Republic of Ireland do you normally use Royal Mail or do you use another mail service provider?

INTERVIEWER INSTRUCTION: PLEASE CLARIFY THAT ALL POST OFFICES BELONG TO ROYAL MAIL.

SINGLE CODE ONLY

1	Royal Mail / the post office
2	Another mail service provider
6	Don't know

IF RESPONDENT USES ANOTHER SUPPLIER (CODE 2 IN Q5)

Q6 Which mail service provider do you normally use?

1	AMP (Alternative Mail and Parcels Limited)
2	DHL Global Mail
3	DX Network Services Ltd
4	Intercity Communications Limited
5	Lynx Mail (Red Star Parcels Ltd trading name)
6	Mail Plus Ltd
7	Racer Consultancy Management Services
8	Royale Research Limited
9	Securicor Omega Express
10	Special Mail Services Limited (SMS)
11	Speedmail International Limited
12	Target Express Parcels
13	TNT Mail
14	UK Mail
15	Other, please specify:

## IF RESPONDENT USES ROYAL MAIL (CODE 1 IN Q4)

Q7 Do you normally use stamps you purchase in advance or do you bring your post to a post office when sending mail to the Republic?

1	Use stamps
2	Bring mail to post office
3	Do both
4	Don't know

## IF RESPONDENT USES ROYAL MAIL (CODE 1 IN Q4)

Q8 How would you rate Royal Mail's service standard regarding cross-border mail to the Republic overall? **READ OUT 1-5**

1	Very good
2	Fairly good
3	Neither good nor poor
4	Fairly poor
5	Very poor
6	Don't know

## IF RESPONDENT USES ROYAL MAIL (CODE 1 IN Q4)

Q9 As far as you are aware of, how many days does it take for a standard letter posted through Royal Mail to be delivered to the recipient in the Republic?

1	📁 days
2	Don't know

## IF OTHER THAN DON'T KNOW IN Q9 (CODE 1 IN Q9)


Q8 And how satisfied or dissatisfied are you with this delivery time? Are you...**READ OUT**

SINGLE CODE ONLY

1	Very satisfied
2	Fairly satisfied
3	Neither satisfied nor dissatisfied
4	Fairly dissatisfied
5	Very dissatisfied
6	Don't know

ASK ALL

Q9 From your point of view, how many days would be an acceptable delivery time for sending a standard letter to someone in the Republic?

1	 days
2	Don't know

---

 IF RESPONDENT USES ROYAL MAIL (CODE 1 IN Q4)

Q9b How would you rate Royal Mail in terms of reliability for sending mail to the Republic?

**READ OUT 1-5**

1	Very good
2	Fairly good
3	Neither good nor poor
4	Fairly poor
5	Very poor
6	Don't know

ASK ALL

Q10 Have you ever taken mail across the border for posting it from a post box or post office in the Republic or would you consider doing so? **READ OUT 1-3**

MULTICODE

1	I have done so
2	I would do so
3	I neither have done nor would consider doing so
4	Don't know

---

 IF CROSS-BORDER MAIL DRIVER (CODES 1-2 IN Q10)

Q11 What are your main reasons for doing so?

MULTICODE

1	Less expensive
2	Quicker
3	More reliable
4	Other, please specify:
5	Don't know

---

Q12 How often do you receive letters or other mail from the Republic of Ireland?

**PROBE TO PRECODES**

SINGLE CODE ONLY

1	At least once a week
2	Less than once a week, but more than once a months
3	Less than once a month, but more than once a year
4	Once a year or less
5	Never
6	Don't know

---

IF MAIL RECIPIENT IN THE LAST 12 MONTHS IN Q12 (CODE 1-3 IN Q12)

Q13 What type of mail did you receive from the Republic in the last twelve months?

**PROBE TO PRECODES**

MULTICODE

ROTATE

1	Social mail, for example from friends or relatives
2	Business or advertising mail
3	Formal mail, for example from Government bodies
4	Don't know

---

IF MAIL RECIPIENT (CODES 1-4 IN Q12)

Q14 Have you ever been surcharged for mail you have received from the Republic that was incorrectly stamped?

SINGLE CODE ONLY

1	Yes
2	No
3	Don't know

---

ASK ALL

Q15 Do you know what the correct Royal Mail postage for sending a letter or postcard weighing up to 20 grams from Northern Ireland to the Republic of Ireland is?

**READ OUT 1-3**

ROTATE 1-3

1	1st class stamp – 39p
2	2nd class stamp – 30p
3	EU interstate stamp - 56p
4	Don't know
5	None of these

---

Q16 The postage currently charged by Royal Mail for sending a letter of up to 20 grams or a postcard to the Republic is 56p, compared to 39p for a first-class letter and 30p for a second-class letter sent within the UK.

How would you rate the value for money consumers get for sending mail to the Republic.

Would you say the value for money is ... **READ OUT 1-5**

1	Very good
2	Fairly good
3	Neither good nor poor
4	Fairly poor
5	Very poor
6	Don't know

---

Q17 Do you think the costs for sending mail to the Republic of Ireland should be higher, lower or the same as for sending mail within the UK?

1	Higher
2	The same
3	Lower
4	Don't know

---

Q18 What sources of information are you aware of regarding the cost of Royal Mail postage and delivery times in general? **DO NOT PROMPT**

MULTICODE

1	Post offices
2	Royal Mail telephone hotline
3	Royal Mail website
4	Printed information provided by Royal Mail
5	Friends, relatives, colleagues etc.
6	Other sources, please specify:
7	Don't know
8	None of these

---

Q19 Do you have any suggestions for how Royal Mail could improve the mail delivery service to the Republic?

INTERVIEWER INSTRUCTION: IF CODE 1 -4, PROBE: "Is there anything else"

1	Lower costs
2	Shorter delivery times
3	Guaranteed next day delivery
4	Increased availability of EU stamps
5	Other improvements, please specify:
6	Don't know
7	None of these

May I ask you some more questions for analysis purposes.

---

Q20 Please tell me which, if any, is the highest educational or professional qualification you have obtained. **READ OUT**

1	GCSE or equivalent
2	'A'-Level or equivalent
3	BTEC / HND or equivalent
4	Bachelor degree or equivalent
5	Masters/PhD or equivalent
6	Other
8	No formal qualifications
9	Refused

---

Q21 Would you describe the area you live in as rural or urban? **READ OUT**

1	Rural
2	Urban
3	Don't know

---

Q22 What is your community background? **READ OUT 1-5**

1	Protestant
2	Catholic
3	Jewish
4	Other
5	None
6	Refused

---

Q23 Do you have friends or relatives in the Republic of Ireland? **READ OUT 1-4**

**MULTIPLE CODE**

1	Friends
2	Relatives
3	None
4	Refused

Q24 How many cars or light vans are there in your household?

1 car or light van	1
2 cars or light vans	2
3+ cars or light vans	3
None	4

Q3 And are you, yourself....**READ OUT**

1	Working 30 hours or more a week (Full-time)	<b>QUOTA CONTROL</b>
2	Working 8 - 29 hours a week (Part-time)	
3	Not working (under 8 hrs) - housewife	<b>QUOTA CONTROL</b>
4	Not working (under 8 hrs) - unemployed (registered)	
5	Not working (under 8 hrs) - unemployed (not registered but looking for work)	
6	Not working (under 8 hrs) - retired	
7	Not working (under 8 hrs) - student	
8	Not working (under 8 hrs) - other (inc. disabled)	

▪ **Questions to determine SEG**

**Occupation of Chief Income Earner**

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY FOR PENSION AND CODE FROM ABOVE

<b>Class</b>	
A	1
B	2
C1	3
C2	4
D	5
E	6

Thank you for taking the time to participate in this research.

**End of questionnaire.**

## 10.2 Business questionnaire

Good morning/afternoon/evening. My name is.....from Ipsos MORI. We are conducting a survey on behalf of Consumer Focus Post, a statutory organisation campaigning for better postal services in Northern Ireland.

The results of this study will help to assess and improve the value for money and quality of postal services.

---

S1 Are you the right person to talk to about the value for money, reliability and speed of delivery of mail services and the impact of these issues on your business? It does not matter how much your business uses mail services.

1	Yes
2	No

---

IF NO IN S1

S2 Who would be the best person to speak to about these things within your organisation?

**INTERVIEWER: PLEASE NOTE NAME, JOB TITLE AND DIRECT LINE NUMBER OF RIGHT PERSON**

Name	
Job title	
Direct line	

START FROM BEGINNING.

Would you be willing to answer a few questions for us? It will only take about 7 minutes and all of your responses will be treated anonymously and will remain confidential.

---

Q1 Does your business have customers, suppliers, other business partners or branches in the Republic of Ireland? **READ OUT 1-4 AND CODE ALL THAT APPLY**

MULTICODE

1	Customers
2	Suppliers
3	Other business partners
4	Other offices / branches of your company
5	Don't know (SINGLE CODE)
6	Refused (SINGLE CODE)

---

- Q2 Please could you tell me how much your business spends on mail services per month? Please include any mail or courier services your business uses. Please estimate if you don't know exactly. **READ OUT**

INTERVIEWER NOTE: A BUSINESS CAN COMPRISE MULTIPLE BRANCHES / OFFICES WHICH SHOULD ALL BE INCLUDED WHEN ANSWERING THIS QUESTION AS LONG AS THEY ARE IN NORTHERN IRELAND.

1	less than £100
2	£100 - £500
3	More than £500 - £2000
4	More than £2000
5	Don't know
6	Refused

- Q3 Does your business also send mail to the Republic of Ireland or receive mail from the Republic? **PROBE TO PRECODES**

INTERVIEWER NOTE: BUSINESS SHOULD SEND OR RECEIVE MAIL AT LEAST ONCE A MONTH TO BE CODED AS 1 OR 2.

#### MULTICODE

1	Send mail
2	Receive mail
2	Neither send nor receive mail to/from the Republic (SINGLE CODE)
3	Don't know (SINGLE CODE)

#### IF MAIL SENDER OR RECIPIENT (CODES 1 OR 2 IN Q3)

- Q4 How would you rate the importance of cross-border mail for your business? Would you say it is **READ OUT**

1	Essential
2	Very important
3	Fairly important
4	Not very important
5	Not at all important
6	Don't know
7	Refused

## IF MAIL SENDER (CODE 1 IN Q3)

Q5 Which suppliers of postal or courier services do you use for sending mail to the Republic?

## MULTICODE

c	AMP (Alternative Mail and Parcels Limited)
2	DHL Global Mail
3	DX Network Services Ltd
4	Intercity Communications Limited
5	Lynx Mail (Red Star Parcels Ltd trading name)
6	Mail Plus Ltd
7	Racer Consultancy Management Services
8	Royal Mail
9	Royale Research Limited
10	Securicor Omega Express
11	Special Mail Services Limited (SMS)
12	Speedmail International Limited
13	Target Express Parcels
14	TNT Mail
15	UK Mail
16	Other, please specify:

## IF ROYAL MAIL USER (CODE 8 IN Q5)

Q5a And does your company use a franking machine located in your premises for posting items through Royal Mail to the Republic?

1	Yes
2	No
3	Don't know

## IF MAIL SENDER OR RECIPIENT (CODES 1 OR 2 IN Q3)

Q6 How would you rate Royal Mail's standard of service regarding cross-border mail to the Republic overall? **READ OUT 1-5**

1	Very good
2	Fairly good
3	Neither good nor poor
4	Fairly poor
5	Very poor
6	Don't know

## IF FAIRLY OR VERY POOR (CODES 4 OR 5 IN Q6)

Q7 Why do you rate Royal Mail's service standard as poor?

PROBE: Have there been recent issues for complaints?

1	<input type="checkbox"/>
2	Don't know

---

IF MAIL SENDER (CODES 1 IN Q3)

Q8 How would you rate Royal Mail in terms of value for money for sending mail to the Republic overall? **READ OUT 1-5**

1	Very good
2	Fairly good
3	Neither good nor poor
4	Fairly poor
5	Very poor
6	Don't know

---

ASK ALL

Q9 Do you know what the correct Royal Mail postage for sending a letter or postcard weighing up to 20 grams from Northern Ireland to the Republic of Ireland is?

**READ OUT 1-3**

ROTATE 1-3

1	1st class stamp – 39p
2	2nd class stamp – 30p
3	EU interstate stamp - 56p
4	Don't know
5	None of these

---

IF MAIL SENDER (CODES 1 IN Q3)


Q10 How would you rate Royal Mail in terms of value for money for sending mail to the Republic overall? **READ OUT 1-5**

1	Very good
2	Fairly good
3	Neither good nor poor
4	Fairly poor
5	Very poor
6	Don't know

---

IF MAIL SENDER (CODES 1 IN Q3)


Q11 As far as you are aware of, how many days does it take for a standard letter posted through Royal Mail to be delivered to the recipient in the Republic?

1	 days
2	Don't know

---

## ASK ALL

Q12 From your point of view, how many days would be an acceptable delivery time for sending a standard letter to someone in the Republic?

1	 days
2	Don't know

## IF ROYAL MAIL USER (CODE 8 IN Q5)

Q13 And how satisfied or dissatisfied are you with the delivery time for sending mail posted through Royal Mail to recipients in the Republic overall? Are you...**READ OUT**

INTERVIEWER NOTE: THIS QUESTION REFERS TO THE DELIVERY TIME OF MAIL SENT TO THE REPUBLIC IN GENERAL (BOTH STANDARD LETTERS AND OTHER ITEMS).

## SINGLE CODE ONLY

1	Very satisfied
2	Fairly satisfied
3	Neither satisfied nor dissatisfied
4	Fairly dissatisfied
5	Very dissatisfied
6	Don't know

## IF MAIL SENDER (CODES 1 IN Q3)

Q14 How would you rate Royal Mail in terms of reliability for sending mail to the Republic?

**READ OUT 1-5**

1	Very good
2	Fairly good
3	Neither good nor poor
4	Fairly poor
5	Very poor
6	Don't know

IF MAIL SENDER (CODES 1 IN Q3) AND USES OTHER COURIERS (CODES OTHER THAN 8 IN Q5)

Q15 Why do you not use Royal Mail exclusively for sending mail to the Republic?

**DO NOT READ OUT.**

PROBE: Are there any other reasons? **CODE ALL THAT APPLY.**

1	Poor service standard in general
2	Poor value for money
3	Poor speed of delivery
4	Poor reliability of mail delivery
5	Other reason, please specify:
6	Not at all important
7	Don't know
8	Refused

---

IF MAIL SENDER (CODES 1 IN Q3) AND ROYAL MAIL USER (CODE 8 IN Q5)

Q16 Do you have any suggestions for how Royal Mail could improve the mail delivery service to the Republic?

INTERVIEWER INSTRUCTION: IF CODE 1 -4, PROBE: "Is there anything else"

1	Lower costs
2	Shorter delivery times
3	Better reliability
4	Guaranteed next day delivery
5	Increased availability of EU stamps
6	Other improvements, please specify:

---

IF BUSINESS HAS Customers / Suppliers / Other business partners / Other offices / branches IN THE REPUBLIC (CODES 1 -4 IN Q1)

As far as you are aware of: Does your business – or somebody on behalf of your business – do any of the following:

INTERVIEWER: SHOULD BE DONE AT LEAST ONCE IN THE LAST 12 MONTHS

Q17 Take mail across the border and post it from the Republic to recipients in the Republic

Q18 Send parcels or packages of letters to a central location or an office in the Republic which are then posted on to recipients in the Republic

Q19 Submit information electronically, for example by using email, to the Republic which is then printed and posted to recipients in the Republic

1	Yes
2	No
3	Don't know

## IF MAIL IS TAKEN ACROSS THE BORDER (CODE 1 IN Q17)

Q20 What are the main reasons your business takes mail across the border which is then posted from the Republic to recipients in the Republic?

## MULTICODE

1	Less expensive
2	Quicker
3	More reliable
4	Other, please specify:
5	Don't know

Q21 Thank you. Would you describe the area your business is located as rural or urban?

IF BUSINESS OF RESPONDENT HAS MORE THAN ONE BRANCH / OFFICE ASK FOR BRANCH / OFFICE MOST MAIL IS SENT FROM.

1	Rural
2	Urban
3	Don't know

## IF RURAL IN Q21

Q22 How would you rate the service Royal Mail provides in rural areas compared to urban areas?

1	Much better
2	Better
3	About the same
4	Worse
5	Much worse
6	Don't know

Thank you for taking the time to participate in this research.

IF CROSS-BORDER MAIL IS OF ESSENTIAL / VERY HIGH / FAIRLY HIGH IMPORTANCE FOR THE BUSINESS OF THE RESPONDENT (CODES 1-3 IN Q4).

Q23 You said at the beginning of the survey that cross-border mail is of <INSERT ESSENTIAL / VERY HIGH / FAIRLY HIGH> importance for your business. Would you be willing to be interviewed in more detail on your views regarding cross-border mail and how it can be improved?.

1	Yes
2	No

**End of questionnaire.**

## 10.3 Topic guide for business depth interviews

Moderator instructions: *Probe fully throughout.*

### General Introduction

- Welcome and introduce self and any others
- Introduction to Ipsos MORI
- Explain market research
- Explain topic in broad terms - “Getting views on cross-border mail services”
- Explain format of interview and how it is an extension of the telephone interview already conducted
- Explain use of digital recorder
- Assure respondents of Security/Confidentiality/Anonymity and MRS Code of Conduct
- Used only for research purposes

### Introduction

- Introduce selves – organisation that they work and role within organisation.
- For what reasons does your organisation send post across the border to ROI? What type of mail do you need to send? How important is cross-border mailing to your organisation?

### Royal Mail

- Overall what are your views of Royal Mail in terms of posting mail to ROI for business purposes? What is good about it? What is not so good about it? PROBE ON PRICE/CONVENIENCE/RELIABILITY Have you experienced any issues with Royal Mail’s cross-border mail service? If so, what have they been? How has it affected your company?
- What postage do you generally use to send letters to ROI using Royal Mail? Have you ever used other means of postage besides EU interstate stamps? (PROMPT: International Signed For, Airsure) Would you consider using these services to send mail to ROI. Why/why not?

### Competitors and other means of getting information to ROI

- Can you think of any other means to get mail/information to customers/suppliers/other parts of your company in ROI besides posting by Royal Mail? DO NOT PROMPT Have you used any of these in the past? What are the advantages of sending information in

these ways compared to Royal Mail? What are the disadvantages? PROBE ON PRICE/CONVENIENCE/RELIABILITY

- Which courier companies are you familiar with? Have you ever used couriers to send mail? What about sending mail to ROI? Which couriers have you used in the past? In these instances why have you used couriers rather than posting by Royal Mail? How do you compare these couriers with Royal Mail in terms of: speed of delivery, value for money, convenience, reliability? Why do you not use other couriers? Prompt: In contrast to Royal mail they offer to pick up your post.
- ASK THOSE WHO SAID THEY CROSSED THE BORDER TO POST MAIL TO ROI: For what reasons have you/would you crossing the border yourself to send business post to ROI? (prompt: is it quicker, more cost-effective, going across the border anyway?). How often would you do this?
- ASK THOSE WHO SAID THEY HADN'T CROSSED THE BORDER TO POST MAIL TO ROI: For what reasons would you not crossing the border yourself to send business post to ROI? (prompt: impractical, Royal Mail's service is sufficient)
- Have you ever considered sending information electronically to the Republic which is then printed and posted to recipients in the Republic? Do you think this is a good idea? Why/why not? What would be the advantages for doing this compared to sending by Royal Mail? What would the disadvantages be?
- Have you ever considered sending parcels or packages of letters to a central location or office in the Republic which is then posted on to recipients in the Republic? Why/why not? What would be the advantages for doing this compared to sending by Royal Mail? What would the disadvantages be?

### **Quality of service**

- How do you rate the overall quality of the Royal Mail's service when sending post to ROI? What is good about it? What is not so good about it? Why do you say this?
- Do you know anything about the Royal Mail logistics/process for cross border mail? How does it get to its destination? Through where does the mail flow? (DO **NOT** PROMPT). Do you think it is an efficient system? How could it be improved?
- From your experience is the service reliable? Why/why not? (probe for examples)
- What improvements do you think should be made to the cross-border mail service in terms of quality of service, if any?

### **Delivery time**

- From your experience, how do you rate the actual performance time of sending post to ROI by Royal Mail? Does it meet your delivery time expectations? Why/why not? Does it meet your company's requirements? Why/why not?
- How do you rate the delivery time of any post you receive from ROI sent by An Post? Does it meet your delivery time expectations? Why/why not?
- How time-sensitive is the mail that you usually post to ROI? If you urgently needed to send mail to ROI to get to its destination the next day how would you send it (prompt: by Royal Mail, by courier, etc) Why?
- Do you think that the NI/ROI delivery time is the same as the delivery time from NI to elsewhere in the UK? Why do you say this? Do you think it should be the same?
- Do you think that there are any differences in the delivery time of cross-border post from where you are compared to post sent from Belfast? Why/why not? (prompt: for differences from cross-border areas/rural areas)
- What improvements do you think should be made to the cross-border mail service in terms of delivery time, if any?

### **Value for money**

- How do you rate the postage costs sending mail to ROI through Royal Mail? Is it more or less than you would expect to pay for posting from NI to ROI? Does it represent value for money for your organisation? Why/why not?
- How does Royal Mail compare to other postal services/couriers in terms of value for money for sending mail to ROI?
- What postage would you generally use to send mail to ROI? Have you or anyone you have sent post to in ROI ever been surcharged for incorrectly stamped postage?
- Do you think that the NI/ROI postage costs are the same as the postage costs from NI to elsewhere in the UK? Why do you say this? Do you think it should be the same?
- What improvements do you think should be made to the cross-border mail service in terms of value for money, if any?

### **Complaints and customer service**

- Thinking of cross-border mailing, how do you rate Royal Mail customer service? What is good/not so good about their customer service? What about An Post?
- Have you ever experienced cross-border post going missing or post being delayed? (probe for examples)

- IF YES: Did you make a complaint? Who did you complain to? Did you find the complaints process straightforward or not? Did they deal with your complaint satisfactorily? (probe for examples)
- IF NO: Who would you complain to if post was missing/delayed?

### **Summary**

- In summary, what is the most positive aspect of Royal Mail's cross-border post service? And the most negative aspect?
- What would be the one key message that you would like us to take back to our client with regards to business cross-border post?

**Thank and close.**