

Improving first class mail services between Northern Ireland and Great Britain

Research report prepared for Consumer
Focus Post

11 May 2010

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Background and objectives

1. Background and objectives

1.1 Background

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

The purpose of this research is to evaluate the performance of Royal Mail with regard to postal services between Northern Ireland and Great Britain.

Royal Mail's performance targets for first class mail in the UK are defined as delivering 93% within the next working day at an overall level and 91.5% in each individual postcode. While Royal Mail meets the stated targets overall, it is probable that this performance standard is not consistent across all mailings. For example, there is reason to believe that first class post sent and delivered within the same city in the UK is more likely to be received next day than mail sent to different towns/cities/countries within the UK, especially if sender and/or receiver are located in rural areas.

Research is therefore needed to assess whether Royal Mail regularly underachieves the performance targets on particular routes. Of particular concern for Consumer Focus Post NI is the experience of the Northern Ireland consumer, both as a sender and receiver of mail to and from Great Britain.

1.2 Research objectives

Therefore, the aim of the research is to evaluate Royal Mail's performance for first class mail services between Northern Ireland and GB. More specifically, the research should assess the following aspects of Royal Mail's performance:

- Whether Royal Mail meets the specific UK target for first class mail between NI and GB;
- Average delivery time and variations of delivery times of first class post sent between Northern Ireland and GB;

- Average delivery time and variations of delivery times of first class post sent and received in rural / urban areas;
- Average delivery time and variations of delivery times of post sent to and from Belfast versus other areas in Northern Ireland;
- Delivery times by week, day of the week and time of day mail is posted.

Research methodology

2. Research methodology

The fieldwork for this research was undertaken over a six week period from 25th January to 6th March 2010.

In total, 2,400 individual items of first class post were sent, 1,200 from Northern Ireland to Great Britain and 1,200 from GB to NI. 40 items of post were sent from each of 30 postboxes in NI and 20 items of post were sent from 60 postboxes in GB. Senders and recipients were geographically spread as shown in the following figures.

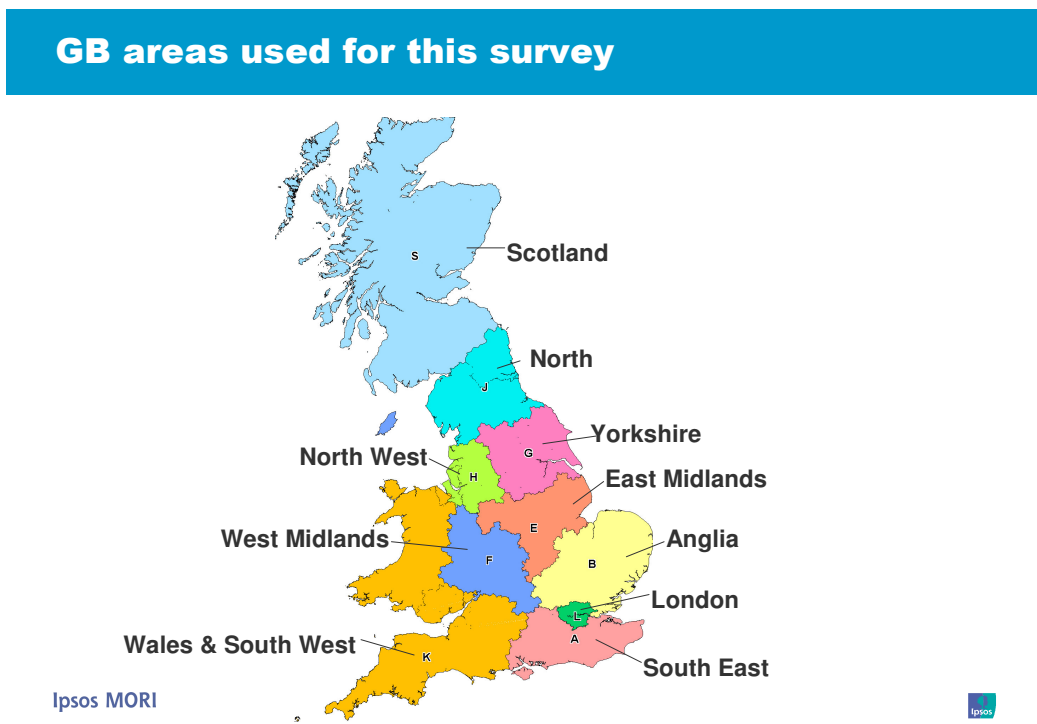
Figure 1

| Northern Ireland locations | Great Britain locations |
|----------------------------|-------------------------|
| ▪ Belfast | ▪ Anglia |
| ▪ Co Antrim | ▪ East Midlands |
| ▪ Co Armagh | ▪ London |
| ▪ Co Down | ▪ North |
| ▪ Co Fermanagh | ▪ North West |
| ▪ Co. L/Derry | ▪ Scotland |
| ▪ Co Tyrone | ▪ South East |
| | ▪ South West |
| | ▪ Wales |
| | ▪ West Midlands |
| | ▪ Yorkshire |

Source: Ipsos MORI

The following map provides an overview on the geographical spread of the GB regions. Maps with exact sender / receiver locations are provided in the appendices.

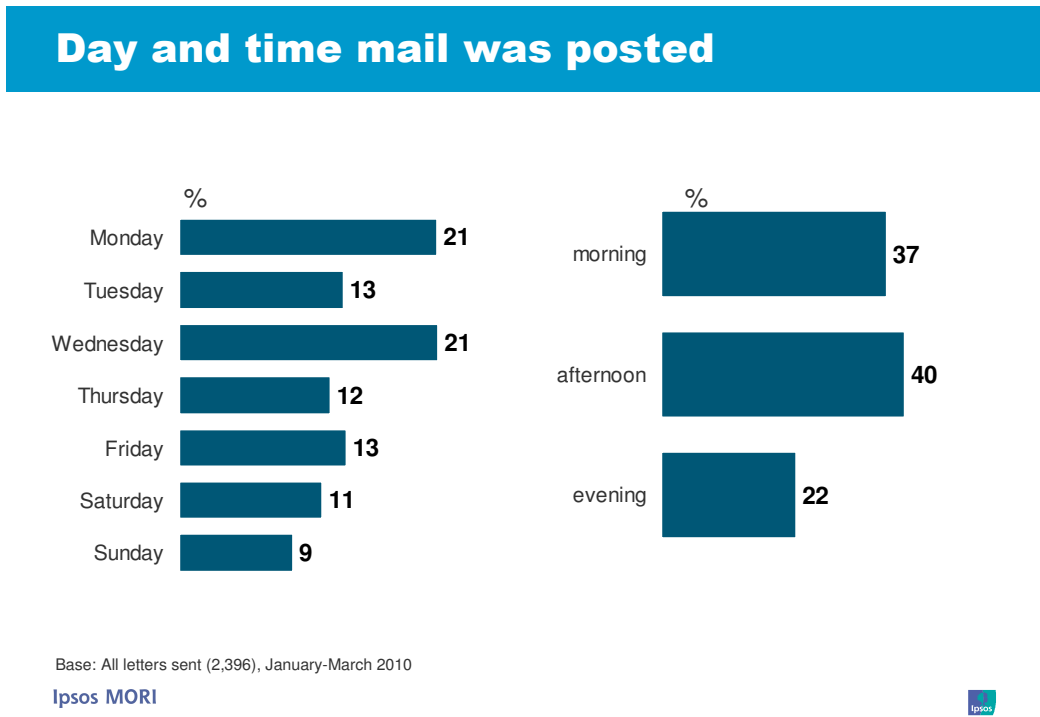
Figure 2



Source: Ipsos MORI

For each postbox used, the receiver address was changed each time a letter was posted 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.

Figure 3



Source: Ipsos MORI

A unique identification number was placed on the 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 4

| Information recorded by the sender | Information recorded by the recipient |
|---|---|
| <ul style="list-style-type: none"> ▪ Unique ID number of item ▪ Date of posting ▪ Time of posting ▪ Name of sender ▪ Recipient name and address ▪ Location of postbox (as stated on postbox) ▪ Postbox number (as stated on postbox) ▪ Time of last collection (as stated on postbox) | <ul style="list-style-type: none"> ▪ Unique ID number of item ▪ Date of receipt ▪ Name of recipient ▪ Location of recipient |

Source: Ipsos MORI

Two different measures were applied to calculate the delivery time.

The first measure is based on the number of working days it takes from the date the next collection is made after the letter is posted, to the date a letter is received.

The following rules were applied to calculate this measure:

- Only days on which Royal Mail delivers (i.e. Monday – Saturday) are counted as relevant working days;
- If the time of posting is after the last collection time listed on the post-box, then the date of next collection at that specific postbox is counted as the relevant sending date;
- If the date of posting is Sunday then the date of sending is counted as Monday.
- If the date of posting is a bank holiday, then the date of sending is counted as the next day of collection stated on the specific postbox.

For example, if a letter is posted after the last collection time on a Monday, the next collection day (Tuesday) would count as the day of sending. If this letter is received the following day (Wednesday), the resulting delivery time would be one working day.

The second method of calculation is based on the day of posting, disregarding the last collection time for a postbox. This measure is used, for example, to analyse the percentage of first class letters delivered within one working day regardless of the time a letter is put into a postbox.

The following rules were applied to calculate this measure:

- Only days on which Royal Mail delivers (i.e. Monday – Saturday) are counted as relevant working days;
- Only letters posted on weekdays are counted.

Some mail service disruptions occurred during the fieldwork period of this study, mainly due to snow and ice conditions. However, from the postcodes and areas mentioned by Royal Mail in their service disruption announcements these disruptions have not significantly impacted on the results overall and delivery times on dates without any service disruptions are not significantly better.¹

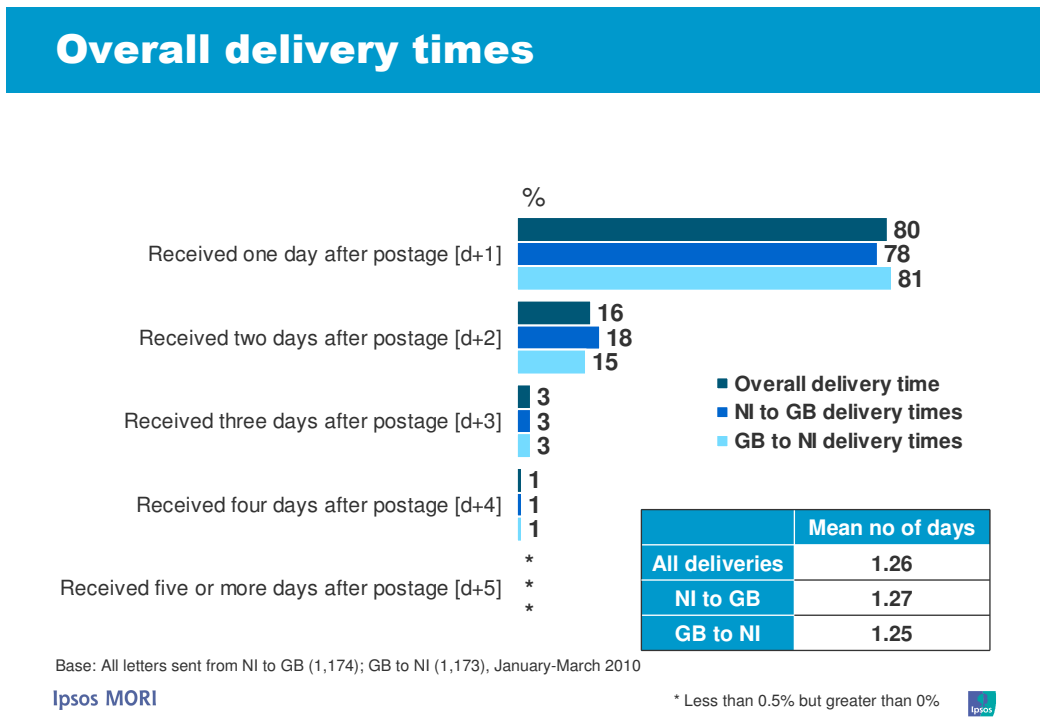
¹ For example, average delivery time of letters sent between 8th and 10th of February (a period when no service disruptions were reported on Royal Mail's website): 1.32 working days

Overall delivery times

3. Overall delivery times

Overall, four in five (80%) letters sent across the Irish Sea are received by the next working day if the date of collection is counted as the date of sending. This is significantly below Royal Mail’s UK service standard of 93% next day delivery for first-class letters. Next day delivery is slightly higher from GB to NI (81%) than from NI to GB (78%).

Figure 5



Source: Ipsos MORI

96% of first-class post is received within two working days and 99% within three working days. The overall average delivery time of first class mail between Northern Ireland and GB is 1.26 days.

The following sections separate out the delivery times according to areas within NI and GB, and rural / urban areas.

Delivery times by location

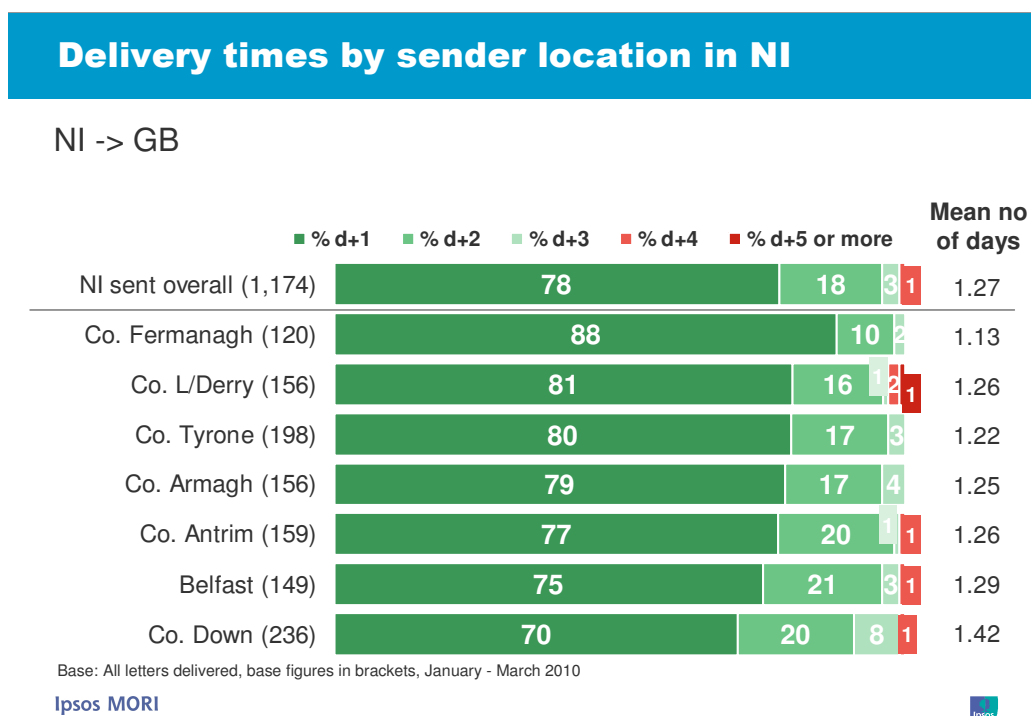
4. Delivery times by location

4.1 NI -> GB deliveries

Overall, 78% of first class post sent from NI to GB arrives at its destination on the next working day after the date of collection.

There are some significant differences in delivery times by sender location in Northern Ireland. Post sent from County Fermanagh is reaching its destination in GB quicker than average (1.13 days versus 1.27 days) with 88% of mail received the next working day compared to an average of 78% overall. Post sent from County Down is slowest of all, with just 70% being received the next working day and 90% received within two working days. First class mail sent from Belfast arrives at its destination in 1.29 working days, with 75% arriving on the next working day.

Figure 6

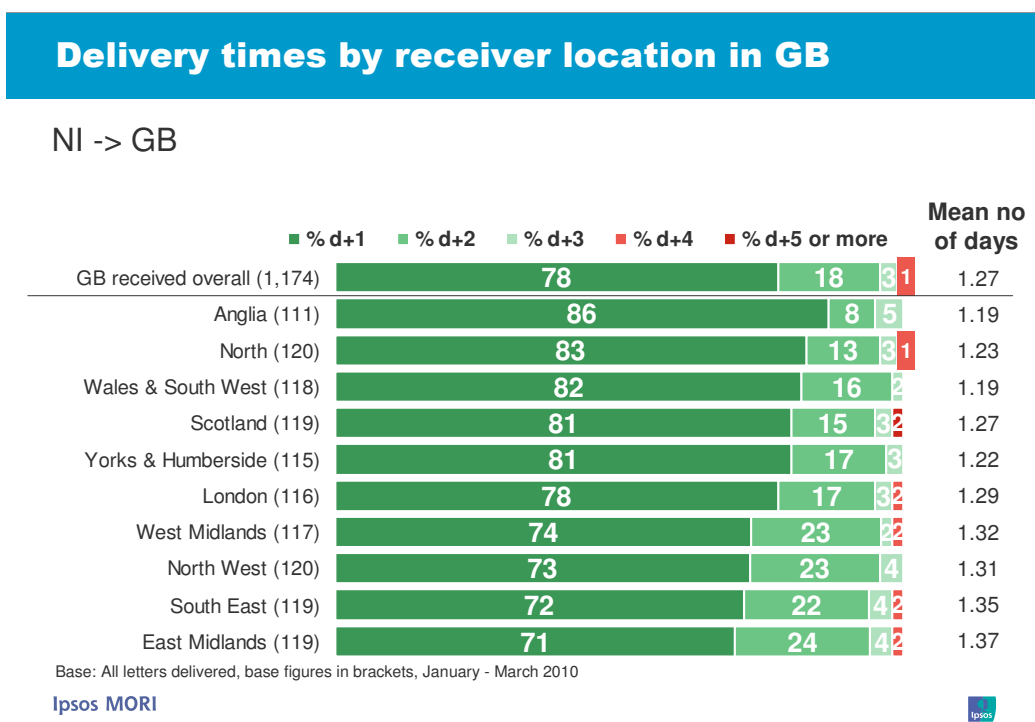


Source: Ipsos MORI

However, the proportion of mail received next day from locations in Northern Ireland may be affected by earlier times for final collections in rural areas (see section 4.3).

Looking at the differences by recipient location reveals that there is some variation by sender location in delivery time for first class post from Northern Ireland. Most areas receive first-class post within a working day, in line with the average. However, Royal Mail’s delivery times vary from an average of 1.19 days for first class mail to Anglia, to an average of 1.37 days for post sent to the East Midlands².

Figure 7



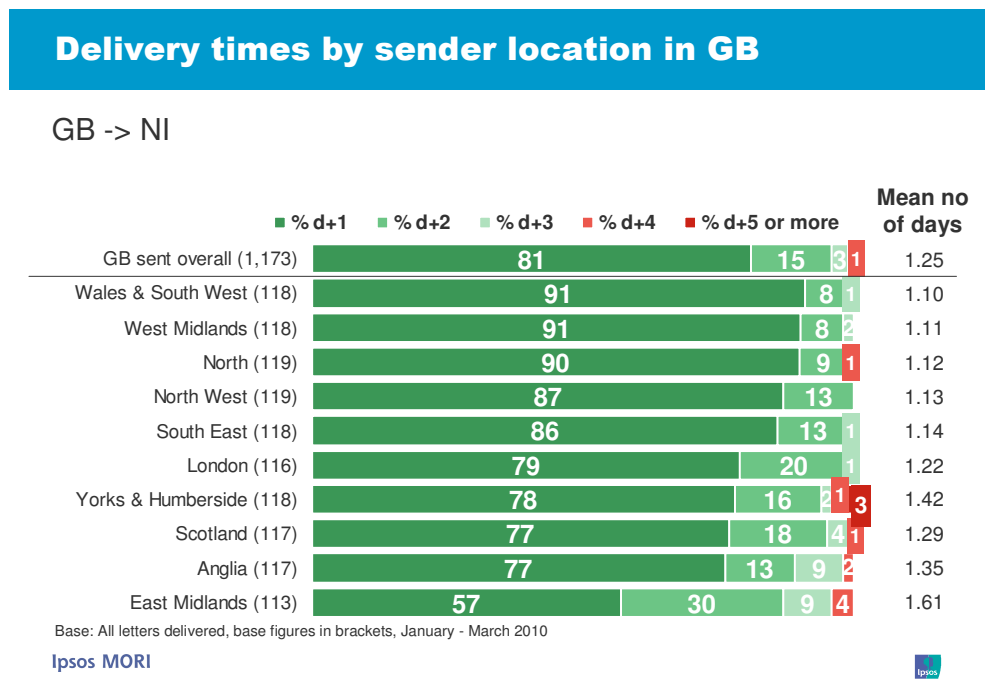
Source: Ipsos MORI

² These results may be affected by earlier times for final collections in rural areas (see section 4.3).

4.2 GB -> NI deliveries

Delivery times from GB to NI are slightly quicker than delivery times from NI to GB. Overall, 81% of first class letters reach their destination within one working day. However, Royal Mail's performance varies significantly according to the area in GB mail is posted from, as shown in the figure below.

Figure 8



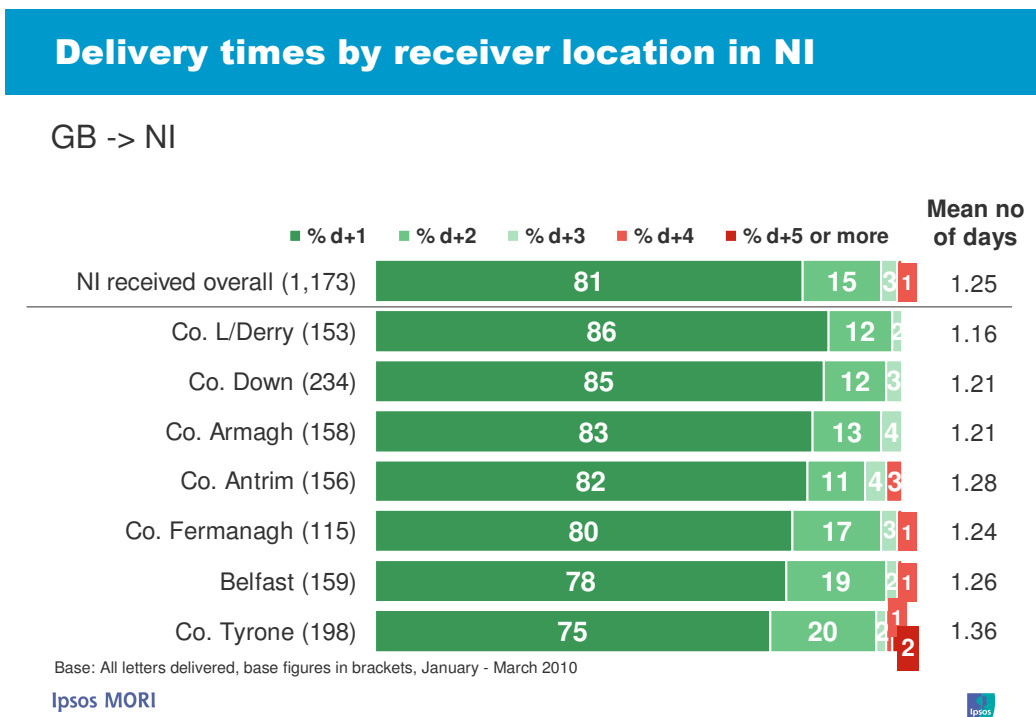
Source: Ipsos MORI

As with post received from Northern Ireland, Royal Mail's performance is weakest with letters sent from East Midlands, with an average delivery time of 1.61 days and only 57% of post reaching its destination by the next working day.

Post from Wales & South West, West Midlands and North have quicker than average delivery times. For these areas, more than nine in ten letters reach their destination in NI by the next working day.

There are few differences in GB to NI delivery times with regard to receiver locations in Northern Ireland. Delivery times are slowest among those receiving post in County Tyrone with only three-quarters of post received by the next working day.

Figure 9

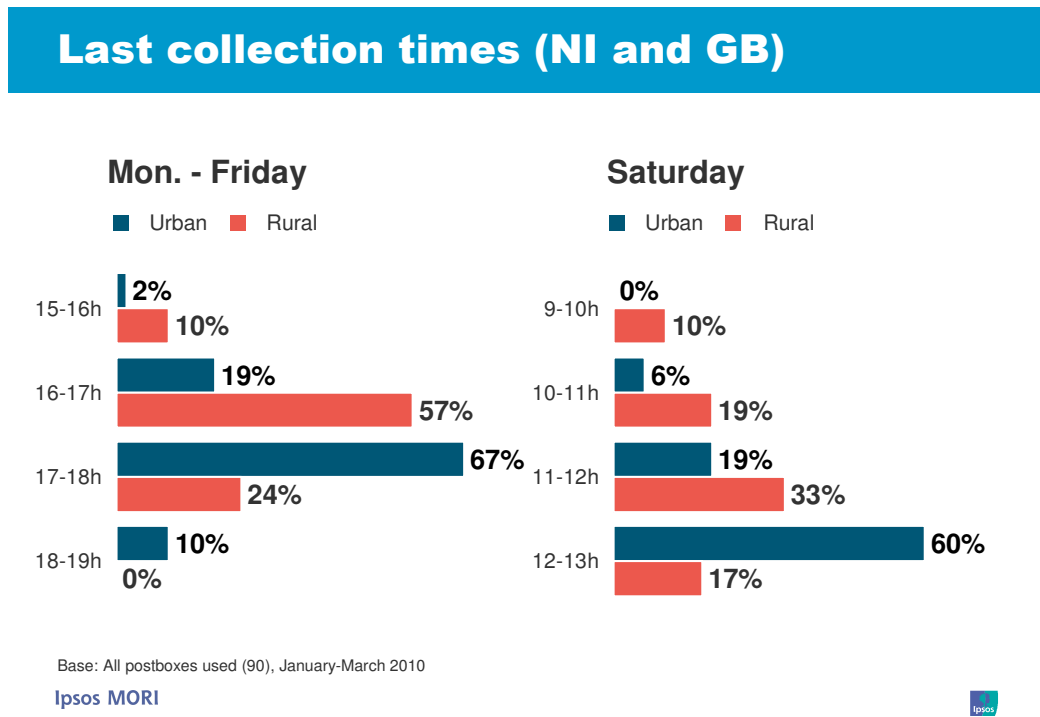


Source: Ipsos MORI

4.3 Urban versus rural areas

There are no significant differences in timescale between post sent to and from urban and rural areas in Northern Ireland, if the date of next collection is counted as the date of sending. However, rural areas are disadvantaged in terms of last collection times, as shown overleaf.

Figure 10

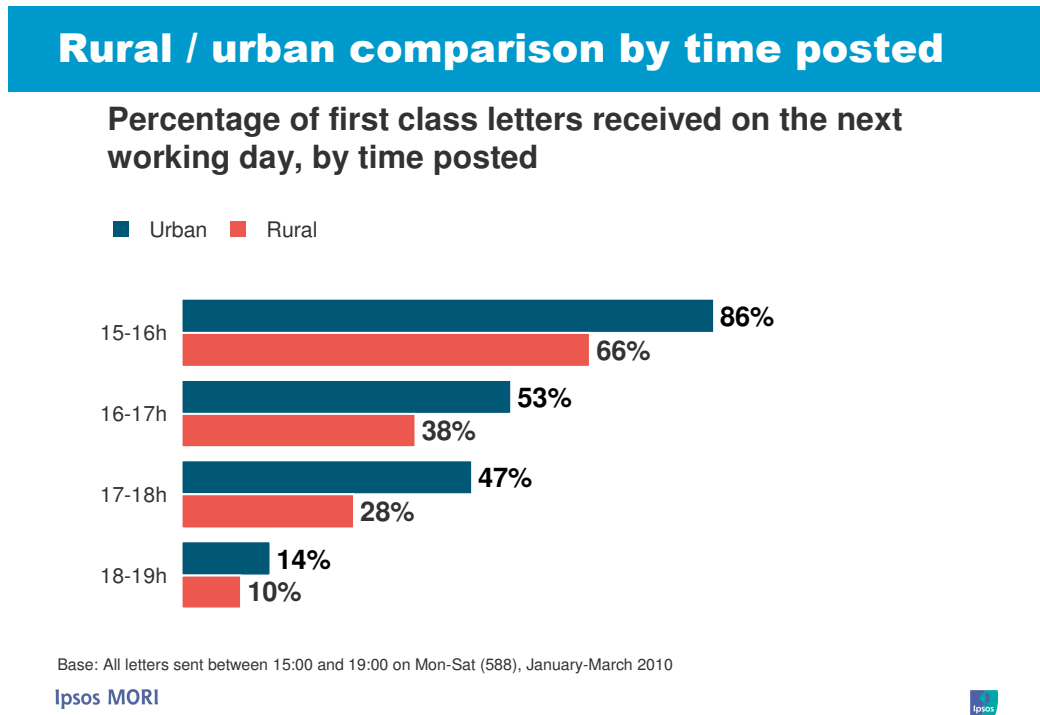


Source: Ipsos MORI

The majority of last collection times in urban³ areas are between 5pm and 6pm whereas most postboxes in rural areas are emptied between 4pm and 5pm. Similarly the average last collection times on Saturdays are later in urban areas. (Please note these results regarding last collection times are only indicative as the study was not set up to be fully representative of all postboxes in urban / rural areas).

Consequently, letters posted from rural areas later in the afternoon are less likely to reach their destination within target time if posted in the afternoon, as shown overleaf.

³ Urban defined as more than 2.8 residents per hectare (GB) / more than 1.0 residents per hectare (NI)

Figure 11

Source: Ipsos MORI

For example, almost half (47%) of the letters posted from urban areas between 5pm and 6pm arrived at the recipient location within one working day, but only 28% if a postbox in a rural area was used.

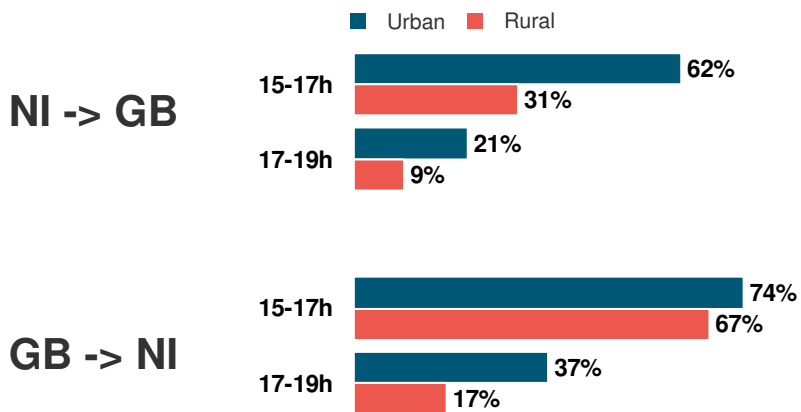
These differences in next day delivery performance in relation to urban / rural location of the sender are even more extreme for post sent from Northern Ireland.

As shown in the chart overleaf, letters posted from Northern Ireland between 3pm and 5pm are twice as likely to arrive the next day if sent from urban areas compared to letters sent from rural areas. Even though post from rural sender areas in GB still has a slower delivery time than post from urban areas, it is less of a problem in GB than in NI.

Figure 12

Rural / urban comparison by direction and time posted

Percentage of first class letters arriving on the next working day, by direction and time posted



Base: All letters sent between 15:00 and 19:00 on Mon-Sat (NI-> GB: 272; GB-> NI: 314), January-March 2010

Ipsos MORI



Source: Ipsos MORI

Analysis by time of day, day of the week and week

5. Analysis by time of day, day of the week and week

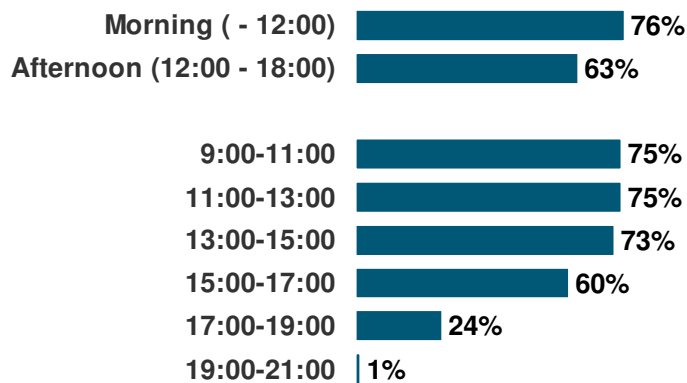
There is a strong relationship between next day delivery and the time a first class letter is posted, for mail in both directions. Next day delivery was achieved for 76% of letters posted in the morning compared to 63% of letters posted in the afternoon.

Next day delivery performance drops significantly if letters are posted after 3pm, with 60% delivered the next day when posted between 3pm and 5pm and 24% when posted between 5pm and 7pm.

Figure 13

Comparison by time of day posted

Percentage of first class letters arriving on the next working day, by time posted



Base: All letters sent by 21:00 on Mon-Sat (1,932), January-March 2010

Ipsos MORI



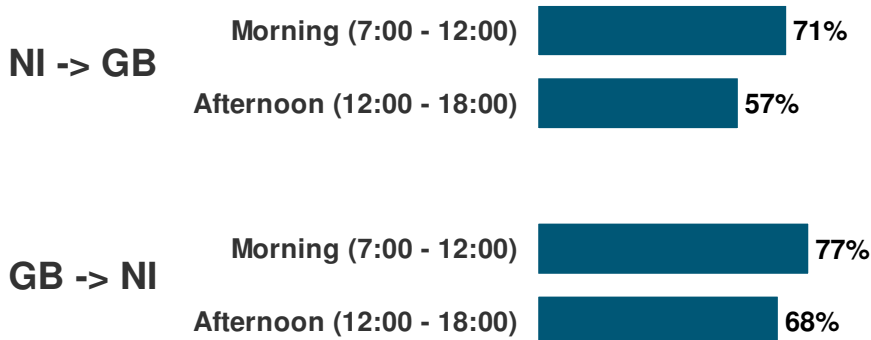
Source: Ipsos MORI

Letters posted from NI to GB are less likely to reach their destination within one working day than letters posted from GB to NI, especially if posted in the afternoon, mainly due to later last collection times in GB.

Figure 14

Comparison by time of day posted and direction

Percentage of first class letters arriving on the next working day, by time posted and direction



Base: All letters sent on Mon-Sat, NI -> GB (812), GB -> NI (803), January-March 2010

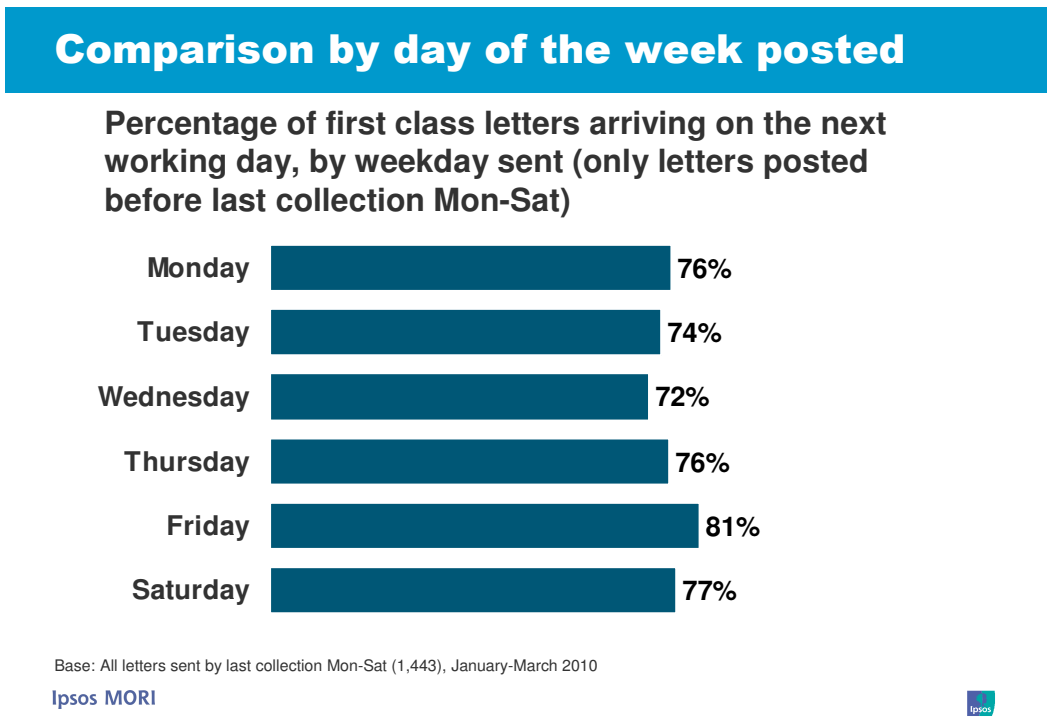
Ipsos MORI



Source: Ipsos MORI

There are some differences relating to the day of the week a letter is sent. Based on letters sent in both directions, letters sent on Fridays (before the last collection time) are most likely to arrive on the next day (81%). Letters sent on Wednesdays are slowest (72% arrive the next day).

Figure 15

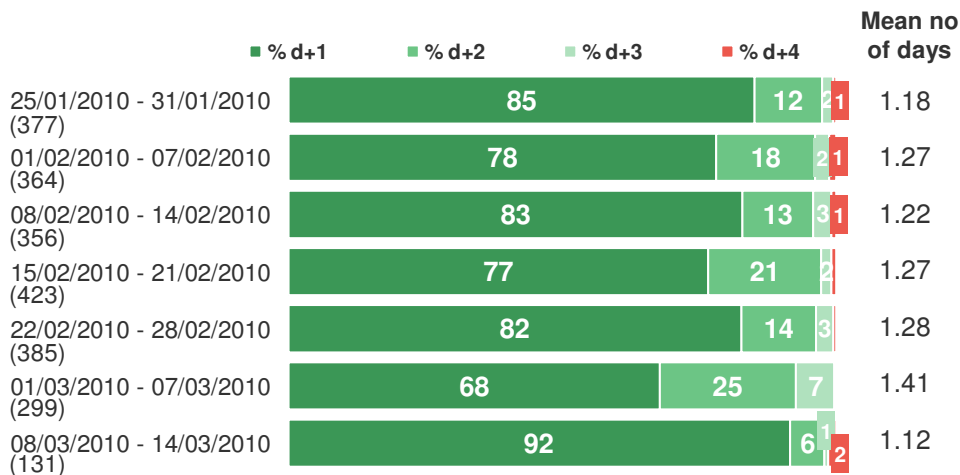


Source: Ipsos MORI

Royal Mail’s performance varied considerably over the six and a half week fieldwork period. The longest average delivery time in both directions was measured for the first week of March when only a few service disruptions were reported by Royal Mail.

Figure 16

Delivery times by day collected



Base: All letters delivered, base figures in brackets, January - March 2010
Ipsos MORI



Source: Ipsos MORI

Summary

6. Summary

- The average delivery time for first class letters sent between NI and GB is 1.26 working days. 80% of letters arrive at their destination on the next working day if the date of next collection is counted as the date of sending. 96% of first class letters arrive within two working days.
- There are no significant differences in performance relating to the direction in which mail is sent (average time 1.27 days NI to GB, versus 1.25 GB to NI).
- The average delivery time is considerably slower than what Royal Mail states to be its overall UK target, namely delivering 93% of first class letters within the next working day.
- Royal Mail's delivery times are slowest for post sent from County Down (1.42 days average delivery time) and Belfast (1.29 days). For post sent from England, delivery times are slowest from the East Midlands (1.61).
- Whether or not a letter is delivered the next working day depends highly on the time it is posted. The percentage of letters arriving the next working day drops to 60% if a letter is posted between 3pm and 5pm, and to 24% if a letter is posted between 5pm and 7pm.
- There are no significant differences in speed of delivery between post sent to and from urban and rural areas in Northern Ireland if the date when the next collection takes place is taken as the date of sending in calculating the delivery time.
- However, rural consumers are disadvantaged because, on average, last collection times in rural areas are earlier, reducing the likelihood that a letter posted in the (late) afternoon will be delivered the next day. For example, 47% of letters posted between 5pm and 6pm reach their destination within the next working day if posted from urban areas, compared to only 28% from rural areas. This drop in performance in rural areas is more significant if a letter is posted from NI when compared to letters sent from GB.
- Royal Mail's performance is not consistent and it varied across the fieldwork period. For instance, 68% was delivered within one working day in w/c 1 March compared to 85% delivered in w/c 25 January. This cannot be explained by the official list of service disruptions released by Royal Mail on its website.

Appendices

Appendices

Sender and receiver locations

Interviewer locations Great Britain



Interviewer locations Northern Ireland

