

Republic Of Ireland Quality Of Postal Service Monitor - 2008 Report

Items Posted On Or Between 1st January & 30th September 2008



Introduction

- TNS mrbi has been commissioned by ComReg to monitor the quality of postal service in the Republic of Ireland, in accordance with the European and Irish Standard, I.S. EN 13850: 2002, 'Postal Services – Quality of Service – Measurement of transit time of end-to-end services for single piece priority mail and first class mail' in parallel with the Guide for the implementation of EN 13850, TR 14709. For monitoring purposes, the universe of post is defined as all single piece priority mail and first class mail posted and delivered in the Republic of Ireland. Monitoring is conducted via a nationwide panel of homes and business premises posting and receiving mail on a continuous basis.
- Reports are issued on a quarterly and year-to-date basis.
- This report presents the Q3 findings for items posted on or between 1st July and 30th September, 2008 and the year to date findings for items posted on or between 1st January and 30th September 2008.
- TNS mrbi is an independent provider of business information and is a fully owned subsidiary of TNS Group.
- To comply with EN 13850 ComReg has approved the appointment of Dr. Myra O'Regan, Department of Statistics, Trinity College, Dublin for the duration of the current contract to conduct an annual year-end audit certification of the monitor carried out by TNS mrbi, on its behalf.

Summary - I

Next Day Delivery – Year To Date Performance

- The year to date performance for Next Day Delivery for single piece priority mail stands at 79% for the period January to September 2008, compared to 78% for the same period in 2007. At 79%, Next Day Delivery performance is significantly below the target of 94%, as set by ComReg.

Delivery Within Three Days – Year To Date

- Year to date, 97.6% of single piece priority mail was delivered within three days of posting, against a ComReg target of 99.5%.

Next Day Delivery – Q3 2008 Performance

- Next Day Delivery for single piece priority mail stands at 80% for Q3 2008 (the period of 1st July to 30th September 2008) and remains at the same level as Q2 2008.

Summary - II

- Compared with Q2 2008 the following shifts are observed for the Next Day Delivery across Methods of Induction;
 - Collections performance from Post Boxes has increased from 79% to 80% while collections performance from businesses has decreased from 84% to 82%.
 - Performance of Stamped Mail has increased from 80% to 82%, while Metered mail sees a 3% decline in performance from 80% to 77% for this quarter.

Q3 2008 Compared With Q3 2007

- Compared with Q3 2007 (the equivalent quarter last year), Next Day Delivery in Q3 2008 has increased by one percentage point.
- Comparing Q3 2008 with Q3 2007, the following shifts are observed for the Next Day Delivery across Methods of Induction:
 - Collection from Business has increased from 80% to 82%.
 - Post Office Induction has declined by one percentage point to 78%.
 - Post Box Induction has increased from 77% to 80%.

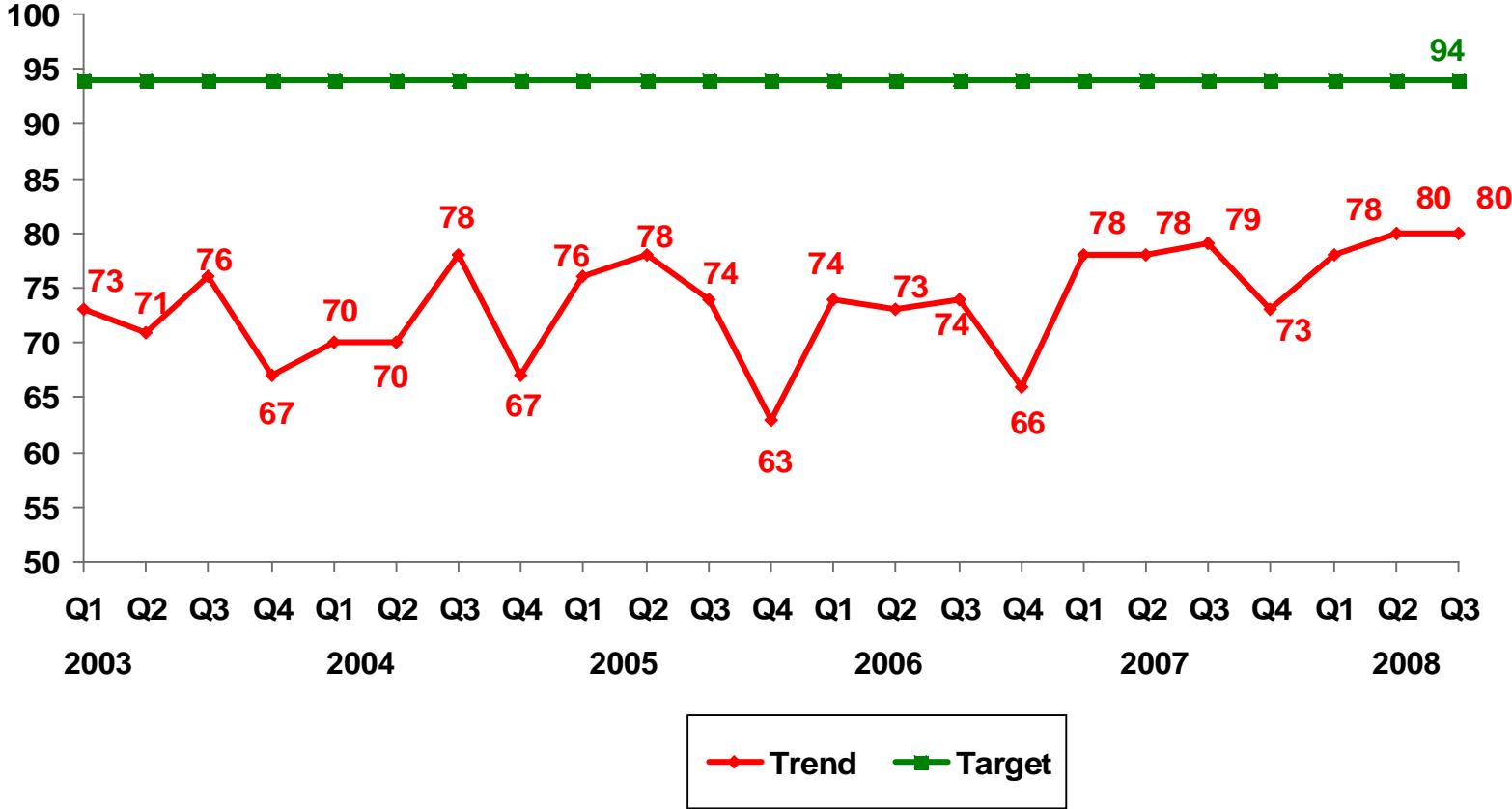
Summary - III

- Looking at the Next Day Delivery performance figures across Mail Format, some changes are registered versus Q3 2007:
 - Standard letters have improved one percentage point, from 79% to 80%.
 - Large envelopes have increased significantly, from 75% to 79%.
 - Packets have remained static at 79%.
- It is interesting to note that so far this year large envelopes and packets have, more or less, performed on a par with standard letters, whereas in previous years standard letters typically performed ahead of other formats.
- Performance of mail posted in Dublin for delivery within the county, has decreased by two percentage points since Q2 2008, and continues to perform poorly - at just 76% in Q3 2008 compared to 82% in Q3 2007. Mail posted from outside Dublin County for delivery within Dublin also performs poorly at 75% in Q3 2008.
- Mail posted within the county for delivery within the county, excluding Dublin County, increased from 83% in Q2 2008 to 84% in Q3 2008, and shows noticeable improvement over Q3 2007, which stood at 79%.

Findings - Quarterly

National Next Day Delivery (D+1)

January 2003 to June 2008 By Quarter



Quality Of Postal Service Targets

with Quarterly & Year To Date An Post Performance for Rol

	TARGET	ACHIEVED Q3 '08	ACHIEVED YTD JAN-SEP '08
Next Day Delivery (D+1)			
From Anywhere to Anywhere	94%	80%	79%
From Dublin County to Anywhere	94%	78%	77%
From outside Dublin County to Anywhere	94%	82%	81%
Delivery Within 3 Days			
From Anywhere to Anywhere	99.5%	97%	98%

Next Day Delivery (D+1)

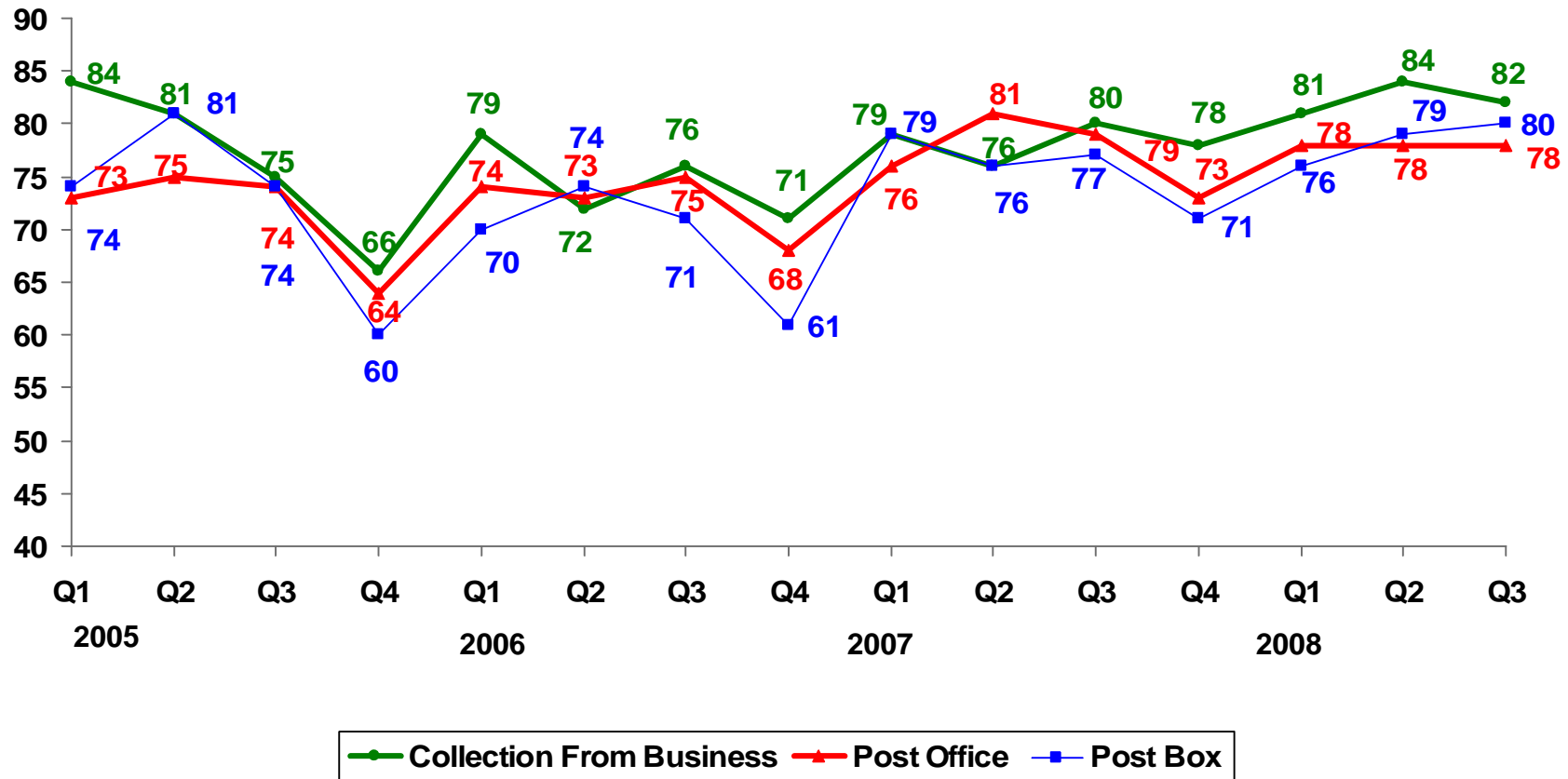
Items Posted On Or Between 1st July & 30th September, 2008

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	80% (+/-2.1%)	80% (+/-3.2%)	76% (+/-4.4%)
	From Dublin County	78% (+/-4.3%)	76% (+/-6.2%)	76% (+/-6.2%)
	From outside Dublin County	82% (+/-1.8%)	84% (+/-2.5%)	75% (+/-4.4%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 7,537
3. Dublin County consists of the administrative areas of the Dublin City Council, Fingal County Council, South Dublin County Council and Dun Laoghaire – Rathdown County Council.

Next Day Delivery (D+1)

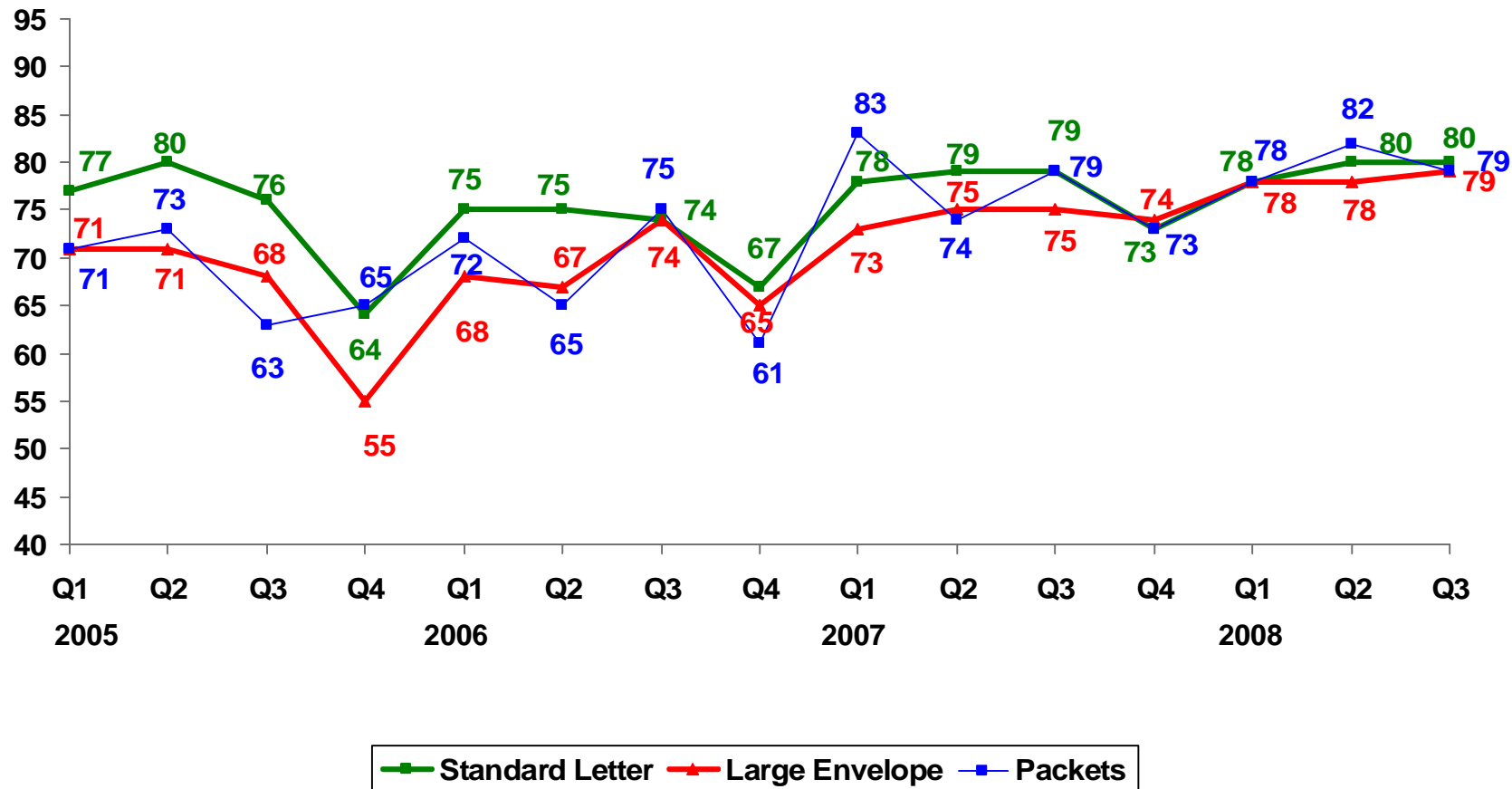
By Induction Method* - January 2005 to September 2008



* Metered Box items not reported due to small base sizes

Next Day Delivery (D+1)

By Mail Format* - January 2005 to September 2008

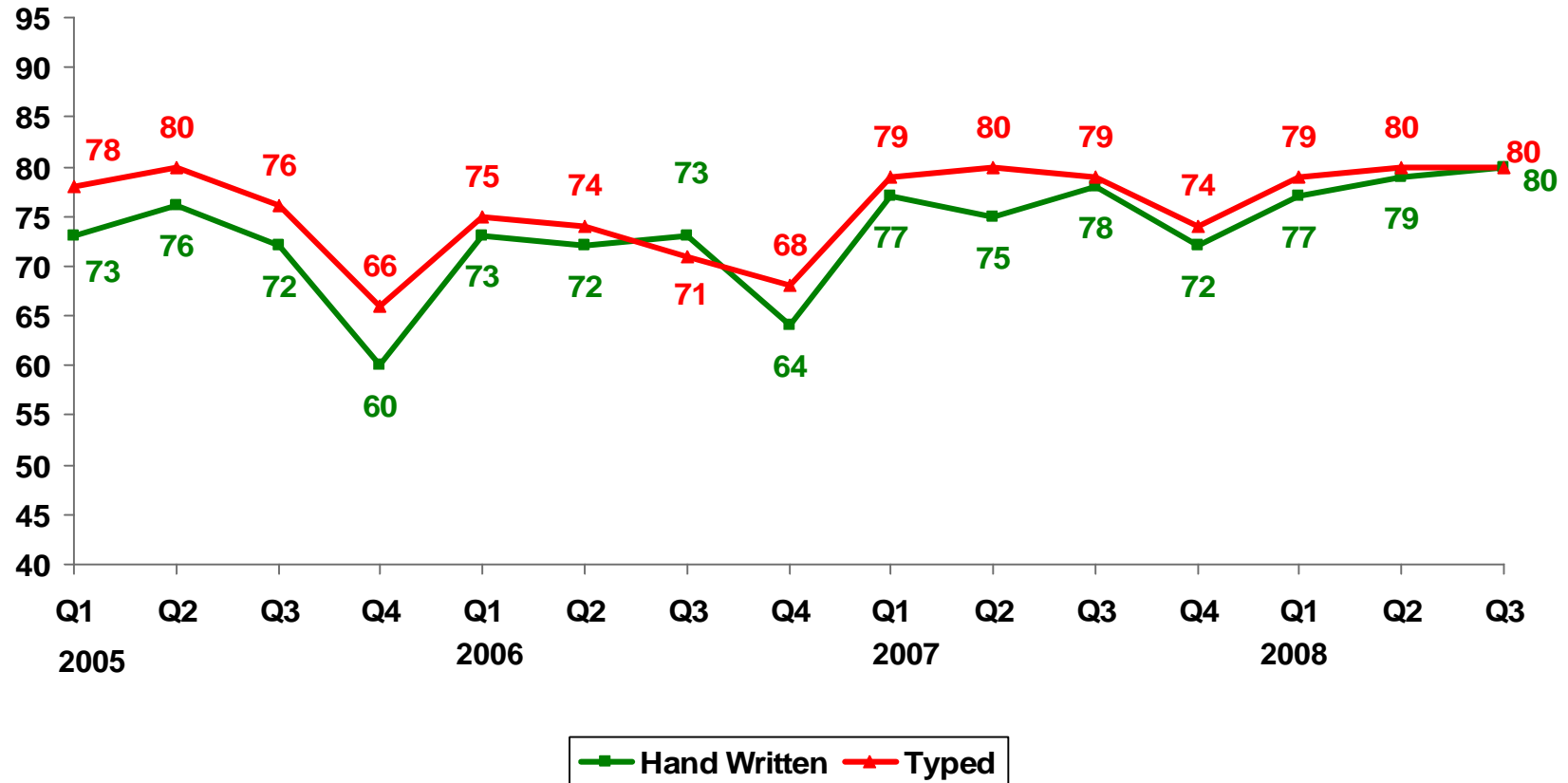


*Standard Letter: Up to C5 size 162mm * 235mm * 5mm. Large Envelope: Up to 400mm * 300mm * 25mm.
Packets: Max size (width + length + thickness) 900mm, Max length 600mm. In roll form (length + twice the diameter) 1040mm, Max length 900mm.

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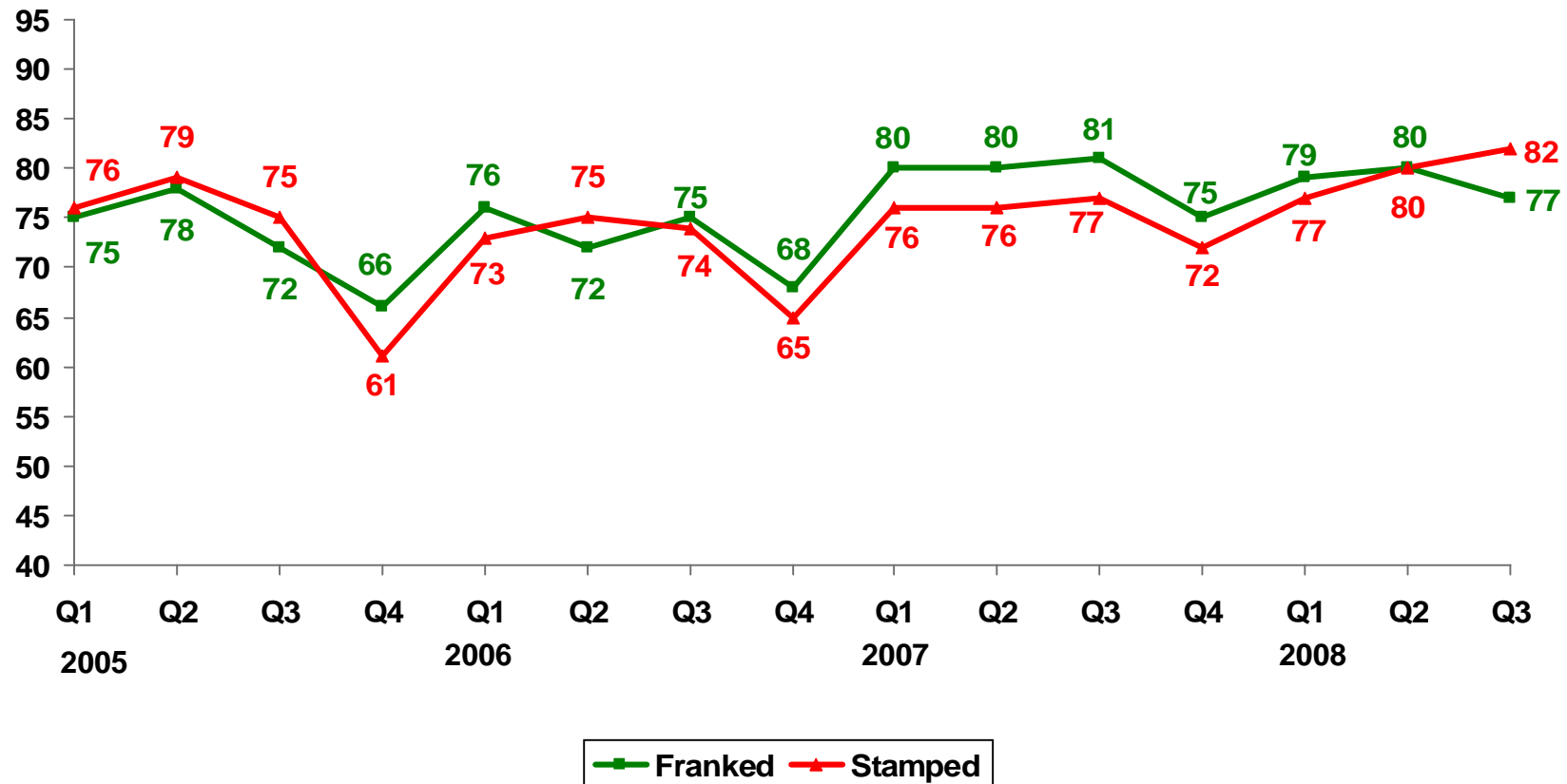
Next Day Delivery (D+1)

By Address Method - January 2005 to September 2008



Next Day Delivery (D+1)

By Payment Type - January 2005 to September 2008



Delivery Within Three Days (D+3)

Items Posted On Or Between 1st July & 30th September, 2008

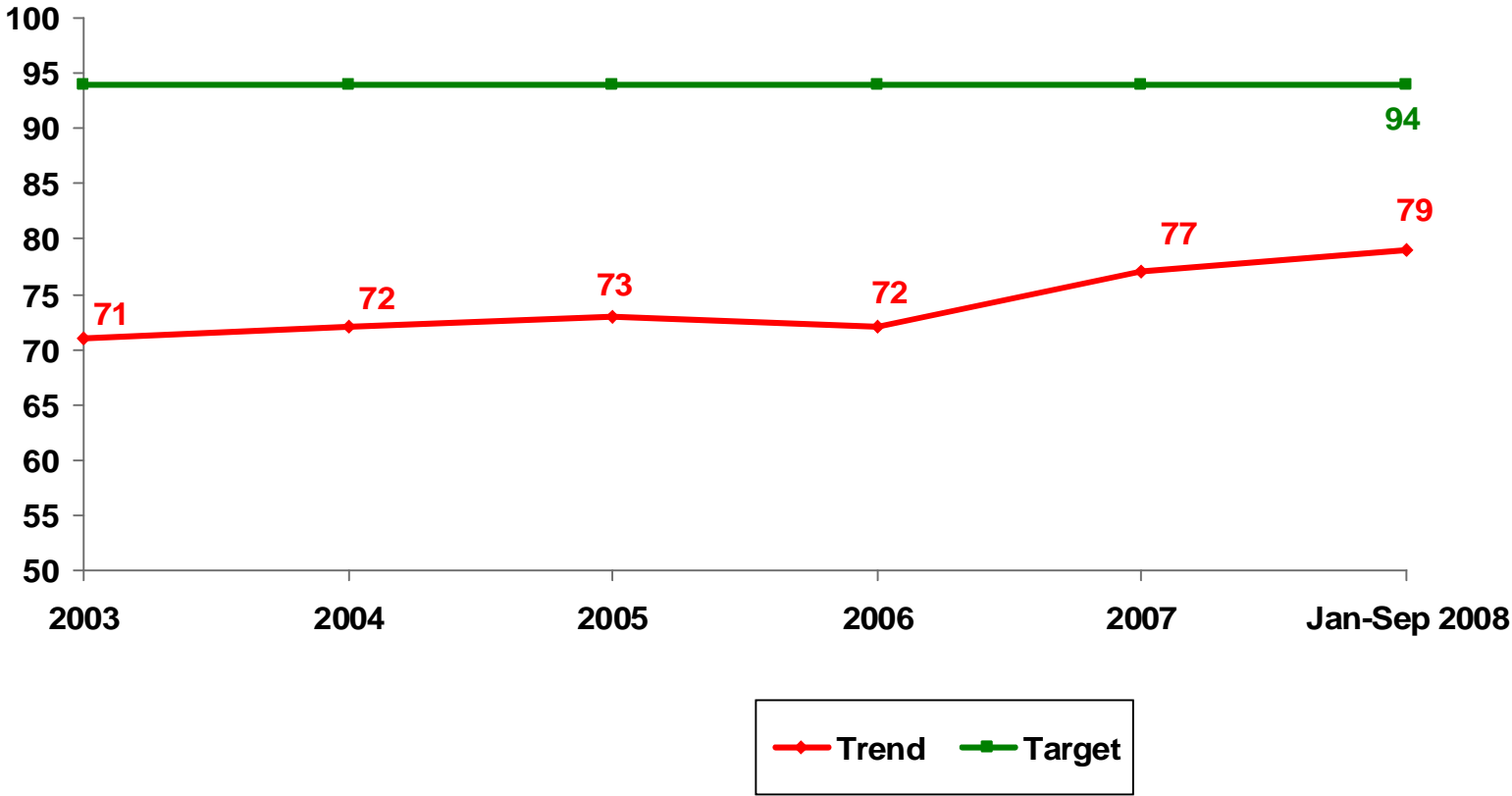
		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	97% (+/-0.7%)	97% (+/-1.0%)	97% (+/-1.4%)
	From Dublin County	97% (+/-1.4%)	96% (+/-2.0%)	96% (+/-2.0%)
	From outside Dublin County	98% (+/-0.6%)	98% (+/-0.8%)	98% (+/-1.5%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 7,537
3. Dublin County consists of the administrative areas of the Dublin City Council, Fingal County Council, South Dublin County Council and Dun Laoghaire – Rathdown County Council.

Findings – Year To Date

National Next Day Delivery (D+1)

Full Year – 2003 to 2008 YTD



Next Day Delivery Nationally (D+1)

Items Posted On Or Between 1st January & 30th September 2008

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	79% (+/-1.2%)	80% (+/-1.7%)	75% (+/-2.3%)
	From Dublin county	77% (+/-2.2%)	76% (+/-3.2%)	76% (+/-3.2%)
	From outside Dublin County	81% (+/-1.1%)	83% (+/-1.5%)	73% (+/-3.1%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 21,685
3. Dublin County consists of the administrative areas of the Dublin City Council, Fingal County Council, South Dublin County Council and Dun Laoghaire – Rathdown County Council.

Delivery Within Three Days (D+3)

Items Posted On Or Between 1st January & 30th September 2008

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	98% (+/-0.3%)	98% (+/-0.5%)	97% (+/-0.7%)
	From Dublin County	97% (+/-0.6%)	97% (+/-0.9%)	97% (+/-0.9%)
	From outside Dublin County	98% (+/-0.4%)	98% (+/-0.5%)	97% (+/-0.9%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 21,685
3. Dublin County consists of the administrative areas of the Dublin City Council, Fingal County Council, South Dublin County Council and Dun Laoghaire – Rathdown County Council.

Methodology & Project Team

Methodology

- The method of monitoring is in full accordance with European and Irish Standard, I.S. EN 13850: 2002, 'Postal Services – Quality of Service – Measurement of transit time of end-to-end services for single piece priority mail and first class mail'.

Calculation Of Transit Time

- From the 1st September 2005 onwards mail posted on Saturday and Sunday are treated as mail posted on Monday. This change reflects the fact that there is no longer a weekend collection service. The Last Time of Posting (LTOP) for next-day delivery is clearly displayed on pillar-boxes and states 'No weekend or public holiday collections or deliveries'. Any test mail items posted on a Saturday, Sunday or Public Holiday, delivered on the next working day will be treated as a D+0 item. D+0 items are included in the D+1 figures for the purposes of calculating next-day delivery.

Methodology (Cont'd)

Sample Design

- The sample design corresponds with the most accurate and up-to-date estimates of real mail flow and discriminant characteristics provided by An Post. The sample employs strict proportionality across all key characteristics. Discriminant characteristics are defined as:
 - Method of posting
 - Method of addressing
 - Envelope colour
 - Envelope size
 - Method of payment
 - Day of week of posting
- Regional mail flows are quota controlled with weighting used to restore proportionality.

Methodology (Cont'd)

Geographical Distribution

- Stratified random sampling is employed to achieve the required panel geographical distribution. All addresses are verified with panellists for accuracy and completeness.

Calculation Of Results

- Accuracy of the transit time is assessed by calculating the variance of the estimator and the design factor, taking into account:
 - number of points of induction and receiving
 - correlation of test items

Project Team

- Damian Loscher – Managing Director
- Louise Miller – Account Director
- Annette Farrell – Project Manager
- Silke Heinzl – Research Consultant

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