Items Posted On Or Between
1st January & 31st December 2018

Republic Of Ireland Quality Of Postal Service Monitor - 2018 Report

Introduction – I

- Ipsos 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 13850:2012 'Postal Services – Quality of Service – Measurement of transit time of end-to-end services for single piece priority mail and first class mail'. 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 private and business individuals, posting and receiving mail on a continuous basis.

- This report presents the annual performance figures for items posted on or between 1st January and 31st December 2018.

- The total number of effective observations in 2018 was 28,256 and the accuracy variance on the overall annual result is at +/-0.9%.

- Ipsos MRBI is an independent provider of business information and is a fully owned subsidiary of Ipsos Group.

Introduction – II

- Due to a period of unusual weather conditions between 28 February and 2 March 2018 all items posted on or between this period have been excluded from the 2018 annual results.

- The independent auditor KPMG, appointed by An Post the regulated entity, conducted an extensive audit to ensure independent and absolute audit certification that the 2018 Monitor and results were carried out in accordance with the Standard I.S. EN13850:2012. Please see overleaf for a summary of this audit report.

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Independent Audit Report of KPMG – 2018 Monitor Results

Overall Conclusion (of KPMG)

- The KPMG audit was designed to express a reasonable assurance conclusion on whether the "On Time" Performance results of the Ipsos MRBI Quality of Service ('QoS') Mail Monitor were materially reliable and robust.

- Based on the procedures performed and evidence obtained, for the Ipsos MRBI QoS Mail Monitor system which covers the period 1 January 2018 to 31 December 2018, in KPMG's opinion:

  - The Mail Monitor processes, within the scope of this review, materially comply with the relevant requirements of the CEN Standard;

  - The system of controls operated by Ipsos over the 2018 Mail Monitor are materially sufficient to enable the production of representative and accurate results; and,

  - The "On Time" Performance results of the Ipsos QoS Mail Monitor for the above period are materially reliable and robust.

Summary – I

Next Day Delivery – 2018 Full Year Performance (1st January to 31st December 2018)

- Next Day Delivery performance of single piece priority mail stands at 89% for 2018, a one percentage point decline since 2017. The performance remains below the ComReg target of 94% and An Post now has a five percentage point improvement to make to meet the Standard.

- Declines were recorded across all regional mail flows during 2018 when compared to 2017. The most significant changes in performance versus 2017, were recorded for mail flowing to Dublin, with performance for Anywhere to Dublin County declining from 90% to 88% and from Outside Dublin County to Dublin County declining from 90% to 87%.

- The performance of mail originating from Dublin County to Dublin County (Local) has also demonstrated a decline of two percentage points versus 2017, now standing at 88% for 2018.

- When comparing 2018 to 2017, the following shifts are noted across the different mail characteristics:

  – The gap between Collection From Business and Post Office and Post Box has increased. Collection From Business remains unchanged at 96%. Post Office performance has declined by one point to 89%. Post Box performance has declined by two points to 87%.

  – The performance of Packets declined by nine points from 88% in 2017 to 79% in 2018.

Summary – II

- A decline of two points was recorded in the performance of Large Envelopes to 88%, whilst the performance of Standard Letters held steady at 90%.

- The performance of Franked Mail has decreased by two percentage points to 92%. Stamped Mail performance has also declined by two points and now stands at 87%.

Delivery Within Three Days – 2018 Full Year Performance (1st January to 31st December 2018)

- Delivery of single piece priority mail Within Three Working Days stands at 99.0% for 2018. This measure is marginally below the ComReg target of 99.5%.

January to November 2018 Performance (1st January to 30th November)

- Next Day Delivery performance of single piece priority mail in the period January to November 2018 stands at 91%, a one percentage point decline since 2017. Delivery of single piece priority mail Within Three Working Days stands at 99.1% for January to November 2018.

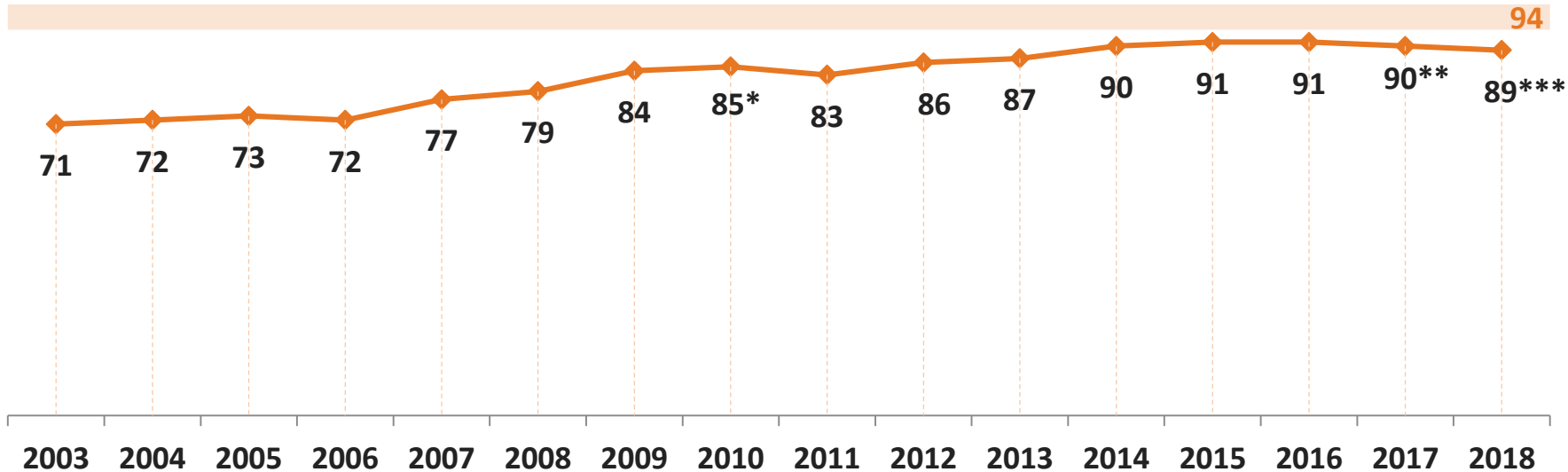*December 2018 Performance (1st to 31st December)*

- Next Day Delivery performance of single piece priority mail for December 2018 stands at 71%, a two percentage point decline since 2017. Delivery of single piece priority mail Within Three Working Days stands at 97.7% for December 2018.

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**Findings
– Full Year Comparisons**

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National Next Day Delivery (D+1)
Full Year – 2003 to 2018

94

71 72 73 72 77 79 84 85* 83 86 87 90 91 91 90** 89***

2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018

*The result shown for 2010 excludes items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.

**The result shown for 2017 excludes items posted on or between 13th-16th October due to the unusual weather conditions experienced during this period.

***The result shown for 2018 excludes items posted on or between 28th February-2nd March due to the unusual weather conditions experienced during this period.
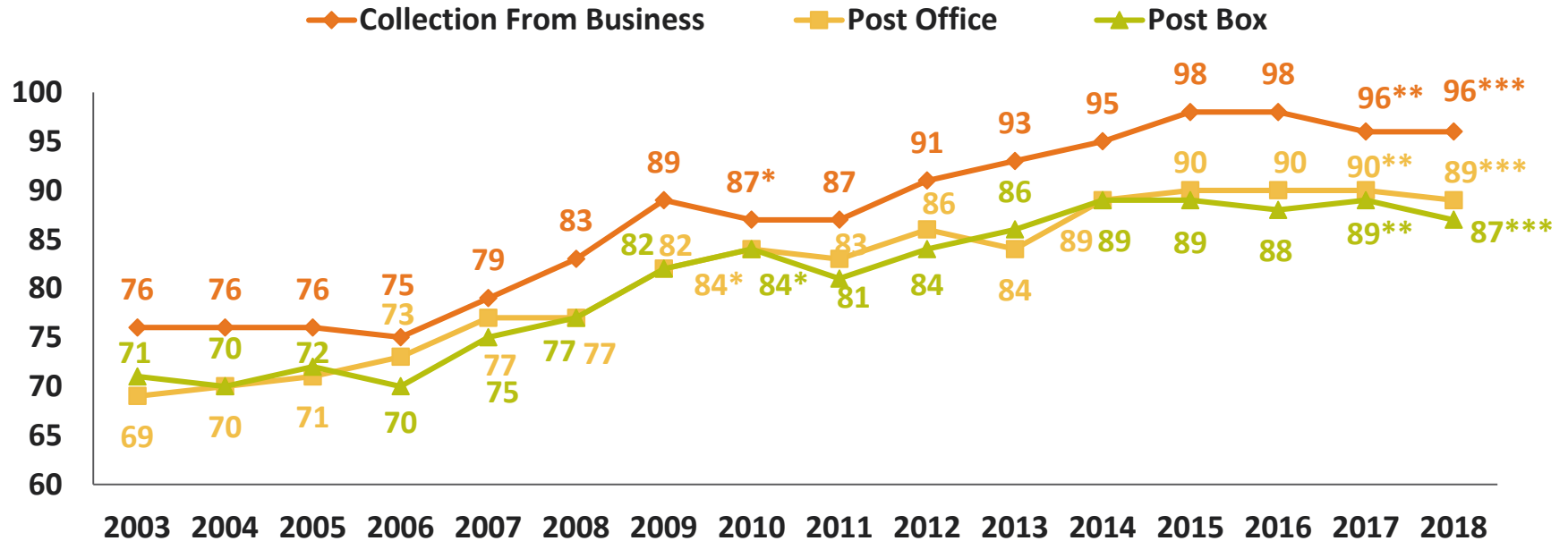
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Next Day Delivery (D+1)
Items Posted On Or Between 1st Jan-31st Dec 2018

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	89% (+/-0.9%)	90% (+/-1.1%)	88% (+/-1.3%)
POSTING (RoI)	**From Dublin County**	88% (+/-1.4%)	88% (+/-1.6%)	88% (+/-1.6%)
	From Outside Dublin County	90% (+/-1.0%)	91% (+/-1.3%)	87% (+/-1.8%)

1. *() Figures in brackets relate to accuracy levels at 95% confidence*
2. *Total number of effective observations – 28,256*
3. *The postal county boundary is formed by the postal address as determined by An Post.*

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Next Day Delivery (D+1) - By Induction Method 2003 to 2018

Legend: ◆ Collection From Business ■ Post Office ▲ Post Box

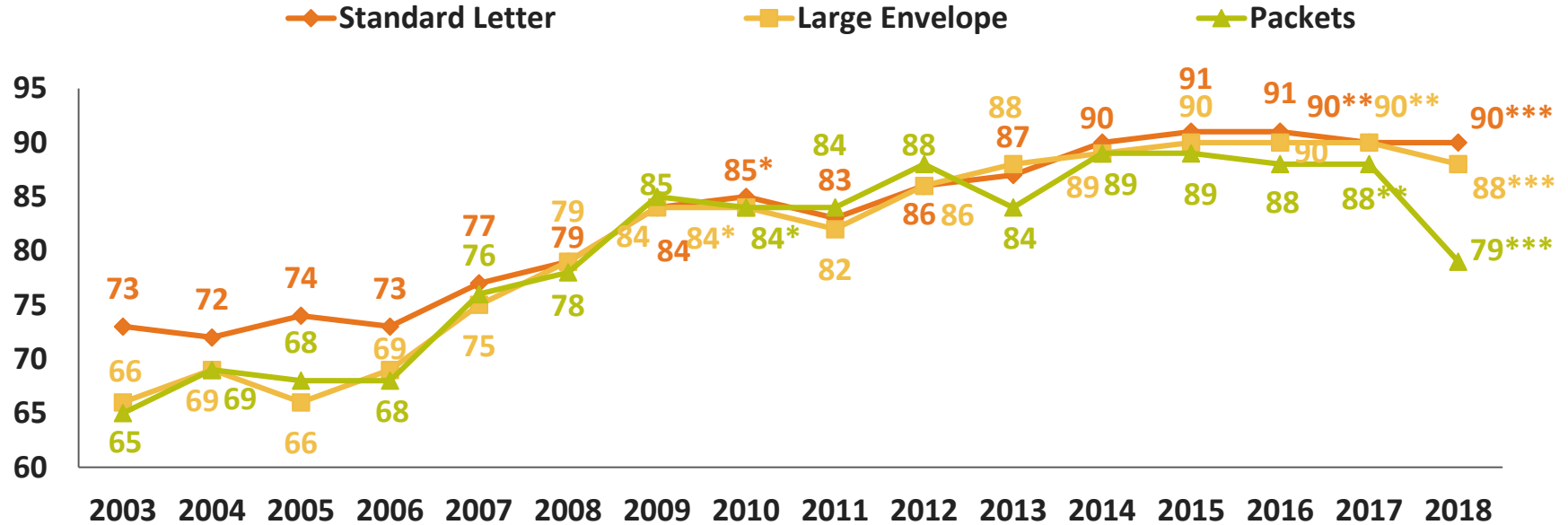| Year	Collection From Business	Post Office	Post Box
2003	76	69	71
2004	76	70	70
2005	76	71	72
2006	75	73	70
2007	79	77	75
2008	83	77	77
2009	89	82	82
2010	87*	84*	84*
2011	87	83	81
2012	91	86	84
2013	93	84	86
2014	95	89	89
2015	98	90	89
2016	98	90	88
2017	96**	90**	89**
2018	96***	89***	87***

*Metered Box items not reported due to small base sizes
*The results shown for 2010 excludes items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.
**The results shown for 2017 excludes items posted on or between 13th October-16th October due to the unusual weather conditions experienced during this period.
***The results shown for 2018 excludes items posted on or between 28th February-2nd March due to the unusual weather conditions experienced during this period.

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Next Day Delivery (D+1)
- By Mail Format 2003 to 2018

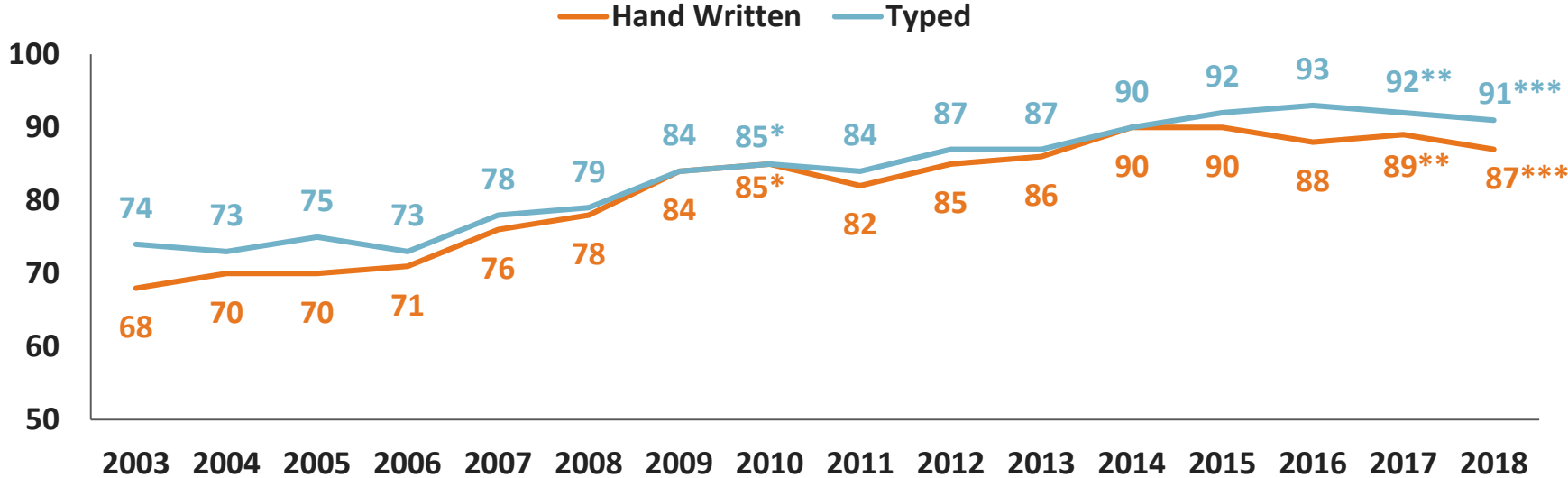**Standard Letter:** Up to C5 size 162mm * 235mm * 5mm. **Large Envelope:** Up to 400mm * 300mm * 25mm.
Packets: Max size (width + length + thickness) 900mm, Max length 600mm. In roll form (length + twice the diameter) 1040mm, Max length 900mm.
 *The results shown for 2010 excludes items posted on or between 28th November-15th December and 17th December-
30th December due to the unusual weather conditions experienced in those two periods.
**The results shown for 2017 excludes items posted on or between 13th October-16th October due to the unusual weather conditions experienced during this period.
***The results shown for 2018 excludes items posted on or between 28th February-2nd March due to the unusual weather conditions experienced during this period.

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Next Day Delivery (D+1)
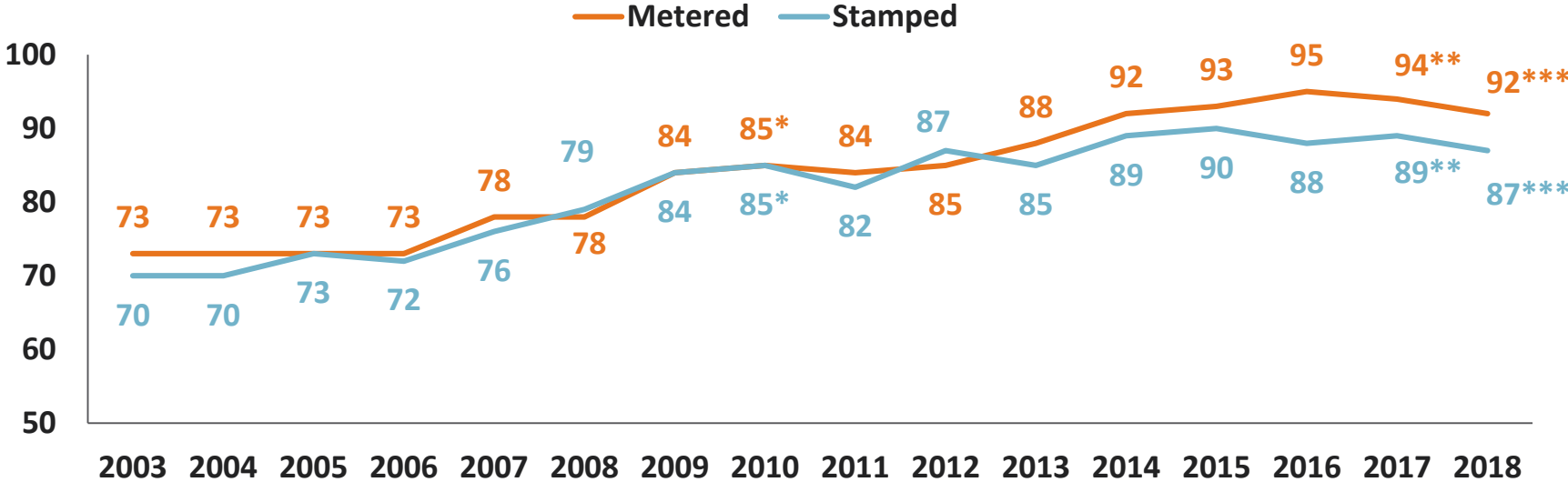# - By Address Method 2003 to 2018

*The results shown for 2010 excludes items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.

**The results shown for 2017 excludes items posted on or between 13th October-16th October due to the unusual weather conditions experienced during this period.

***The results shown for 2018 excludes items posted on or between 28th February-2nd March due to the unusual weather conditions experienced during this period.

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Next Day Delivery (D+1)
- By Payment Method 2003 to 2018

Metered   **Stamped**

Metered values: 73, 73, 73, 73, 78, 78, 84, 85*, 84, 85, 88, 92, 93, 95, 94**, 92***

Stamped values: 70, 70, 73, 72, 76, 79, 84, 85*, 82, 87, 85, 89, 90, 88, 89**, 87***

Years: 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018

*The results shown for 2010 excludes items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.
**The results shown for 2017 excludes items posted on or between 13th October-16th October due to the unusual weather conditions experienced during this period.
***The results shown for 2018 excludes items posted on or between 28th February-2nd March due to the unusual weather conditions experienced during this period.
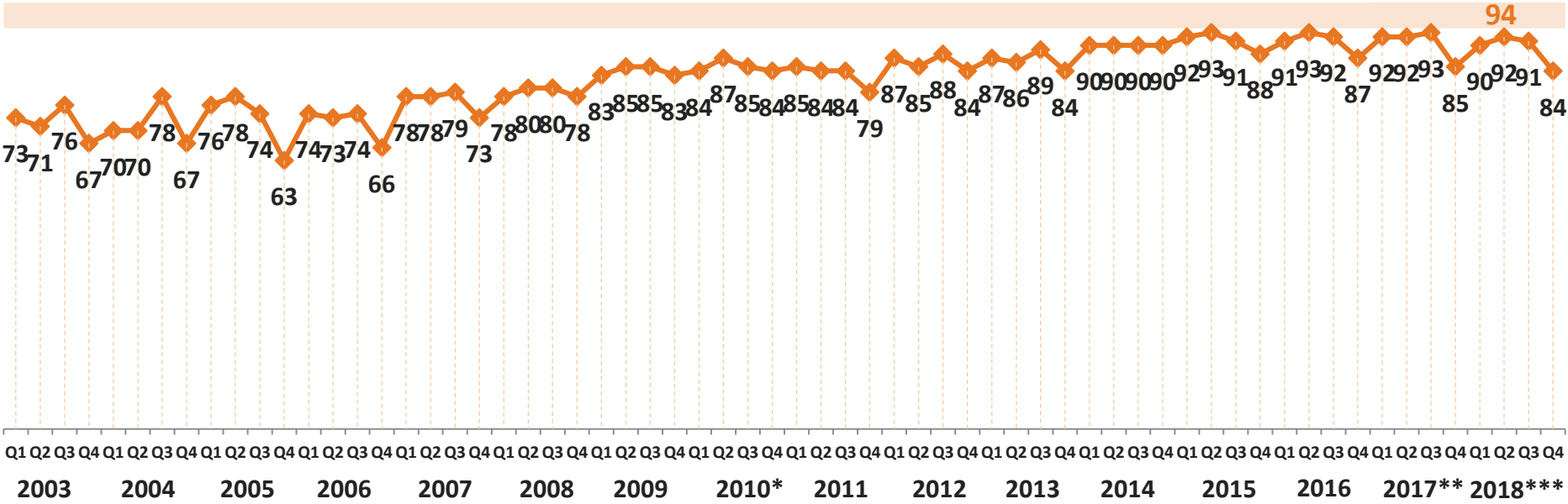
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Delivery Within Three Days (D+3)
Items Posted On Or Between 1st Jan & 31st Dec 2018

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	99.0% (-0.2% to +0.1%)	99.0% (-0.4% to +0.1%)	98.7% (-0.6% to +0.2%)
POSTING (RoI)	**From Dublin County**	98.7% (-0.6% to +0.2%)	98.7% (-0.8% to +0.2%)	98.7% (-0.8% to +0.2%)
	From outside Dublin County	99.1% (-0.3% to +0.1%)	99.2% (-0.5% to +0.1%)	98.7% (-1.0% to +0.2%)

1. *() figures in brackets relate to accuracy levels at 95% confidence*
2. *Total number of effective observations – 28,256*
3. *The postal county boundary is formed by the postal address as determined by An Post.*

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National Next Day Delivery (D+1) - Jan 2003 to Dec 2018 By Quarter

*The result shown for Q4 2010 excludes items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.

**The result shown for Q4 2017 excludes items posted on or between 13th October-16th October due to the unusual weather conditions experienced during this period.

***The result shown for Q1 2018 excludes items posted on or between 28th February-2nd March due to the unusual weather conditions experienced during this period.

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Next Day Delivery – January to November

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Next Day Delivery (D+1)
Items Posted On Or Between 1st Jan-30th Nov 2018

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	91% (+/-0.8%)	91% (+/-1.0%)	90% (+/-1.2%)
POSTING (RoI)	**From Dublin County**	90% (+/-1.2%)	90% (+/-1.5%)	90% (+/-1.5%)
	From Outside Dublin County	92% (+/-0.9%)	92% (+/-1.2%)	90% (+/-1.8%)

1. *() Figures in brackets relate to accuracy levels at 95% confidence*
2. *Total number of effective observations – 26,091*
3. *The postal county boundary is formed by the postal address as determined by An Post.*

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Delivery Within Three Days (D+3)
Items Posted On Or Between 1st Jan - 30th Nov 2018

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	99.1% (-0.2% to +0.1%)	99.1% (-0.4% to +0.1%)	98.8% (-0.6% to +0.2%)
POSTING (RoI)	**From Dublin County**	98.7% (-0.6% to +0.2%)	98.7% (-0.8% to +0.2%)	98.7% (-0.8% to +0.2%)
	From outside Dublin County	99.3% (-0.3% to +0.1%)	99.2% (-0.6% to +0.1%)	98.8% (-1.0% to +0.2%)

1. *() figures in brackets relate to accuracy levels at 95% confidence*
2. *Total number of effective observations – 26,091*
3. *The postal county boundary is formed by the postal address as determined by An Post.*

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Next Day Delivery – December

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Next Day Delivery (D+1)
Items Posted On Or Between 1st-31st December 2018

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	71% (+/-4.1%)	78% (+/-5.2%)	67% (+/-6.5%)
POSTING (RoI)	**From Dublin County**	70% (+/-9.8%)	73% (+/-10.1%)	73% (+/-10.1%)
	From Outside Dublin County	71% (+/-4.1%)	81% (+/-5.4%)	59% (+/-7.0%)

1. *() Figures in brackets relate to accuracy levels at 95% confidence*
2. *Total number of effective observations – 2,165*
3. *The postal county boundary is formed by the postal address as determined by An Post.*

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Delivery Within Three Days (D+3)
Items Posted On Or Between 1st-31st December 2018

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	97.7% (-1.0% to +0.7%)	98.7% (-1.6% to +0.8%)	97.7% (-1.9% to +1.1%)
POSTING (RoI)	**From Dublin County**	98.1% (-2.1% to +1.0%)	98.1% (-2.6% to +1.4%)	98.1% (-2.6% to +1.4%)
	From outside Dublin County	97.6% (-1.3% to +0.8%)	99.0% (-2.3% to +0.9%)	97.2% (-3.2% to +1.8%)

1. *() figures in brackets relate to accuracy levels at 95% confidence*
2. *Total number of effective observations – 2,165*
3. *The postal county boundary is formed by the postal address as determined by An Post.*

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Methodology

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Methodology – I

- The method of monitoring is in full accordance with the European and Irish Standard, EN13850:2012 '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. Any test mail items posted on a Saturday, Sunday or Public Holiday, delivered on the next working day are treated as a D+0 item. D+0 items are included in the D+1 figures for the purposes of calculating next-day delivery.

- The Latest Time of Posting (LTOP) for Next Day Delivery and 'no weekend or public holiday collections/deliveries' is clearly displayed, by An Post, to postal service users at all access points. This is also documented by An Post and provided to Ipsos MRBI on a quarterly basis.

Methodology – II

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 2015 provisionally audited RMS results provided by An Post were used in the statistical design of the January to October 2018 flows.

- The 2017 RMS data was used in the statistical design of the November and December 2018 flows.

- All 2018 results were weighted to the 2017 RMS data.

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Methodology – III

Sample Design (Continued)

- The sample employs strict proportionality across all key characteristics. Discriminant characteristics are defined as:
    - Dropper Type
    - Induction Method
    - Mail Size
    - Mail Colour
    - Mail Format
    - Address Method
    - Mail Weight
    - Receiver Type
    - Payment Method
    - Induction Day
    - Induction to Delivery Region

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Methodology – IV

Geographical Distribution

- Stratified random sampling is employed to achieve the required panel geographical distribution.

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

Eircodes

- In July 2015 Eircode was introduced in Ireland and was implemented in the Quality of Service Monitor from October 2015.
- The Eircode and postal address associated with that Eircode is used for each panellist.

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Non Working Days & Derogation Days

The following Non Working Days and Derogation Days were applied in 2018:

01/01/2018	New Year's Day Public Holiday
19/03/2018	Derogation Day (in lieu of St. Patrick's Day)
30/03/2018	Good Friday Derogation Day
02/04/2018	Easter Monday Public Holiday
07/05/2018	May Public Holiday
04/06/2018	June Public Holiday
06/08/2018	August Public Holiday
29/10/2018	October Public Holiday
24/12/2018	Christmas Eve Derogation Day for Collections only
25/12/2018	Christmas Day Public Holiday
26/12/2018	St. Stephen's Day Public Holiday
27/12/2018	Derogation Day
	All Saturdays
	All Sundays

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Weighting

- In order to ensure that mail flows represent the 2017 RMS data, corrective weights are applied to the data.

- The weighting caps for each discriminant characteristic for January to December 2018 meet the requirements of section 7.3.2.2 of CEN.

- In addition, the weighting caps for each individual item for January to December 2018 meet the requirements of section 7.3.2.3 of CEN.

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Name and Address of Monitored Postal Operator

An Post
General Post Office
O'Connell Street Lower
Dublin 1
D01 F5P2

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