

REPUBLIC OF IRELAND QUALITY OF POSTAL SERVICE MONITOR - 2020 REPORT

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Commission for
Communications Regulation



Ipsos MRBI
GAME CHANGERS

STATEMENT REGARDING THE IMPACT OF COVID-19 IN 2020

- In March 2020 the COVID-19 pandemic reached Ireland. On March 27th, the Irish Government issued instructions on COVID-19 to the public, initiating the shut-down of all non-essential workplaces and services. Postal Services were deemed to be an essential service and as such the provision of the universal postal service by An Post, the designated universal postal service provider for the state, continued throughout the year. No applications from An Post for an exemption from provision of the universal postal service for 'Force Majeure' events were received by ComReg in 2020.
- While the provision of postal services was deemed essential, the management of the Quality of Service Monitor by Ipsos MRBI was not considered essential and Ipsos MRBI staff were required to stay at home as per Government guidelines. As a result, the operation of the 2020 Quality of Service Monitor was suspended from 1st April to 30th June inclusive, therefore 2020 Annual Report presents the performance results for items posted over 9 months in 2020 as follows; January, February, March, July, August, September, October, November and December.
- For the most part, the ability of private panellists to participate in the Monitor was unaffected by COVID-19 restrictions. Some businesses panellists were affected due to the temporary closure of non-essential businesses. In spite of this challenge, the 2020 Quality of Service Monitor fully reflects the profile of mail as per RMS 2018, in accordance with the standards.

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.
- As per the Statement Regarding the Impact of COVID-19 in 2020, the 2020 Quality of Service Monitor was suspended from 1st April to 30th June inclusive due to COVID-19 restrictions, therefore the 2020 Annual Report presents the performance results for items posted during the following 9 months: January, February, March, July, August, September, October, November and December.
- The total number of effective observations in 2020 was 19,948 and the accuracy variance on the overall annual result is at +/-1.3%.
- Ipsos MRBI is an independent provider of business information and is a fully owned subsidiary of Ipsos Group.

INTRODUCTION – II

- The independent auditor KPMG, appointed by An Post the regulated entity, conducted an extensive audit to ensure independent and absolute audit certification that the 2020 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.

INDEPENDENT AUDIT REPORT OF KPMG – 2020 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 QoS Mail Monitor system which covers the 9 month period from 1 January to 31 March and from 1 July to 31 December 2020, 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 2020 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 period from 1 January to 31 March 2020, and, from the 1 July to 31 December 2020, are materially reliable and robust.

SUMMARY – I

Next Day Delivery – 2020 Annual Performance

- Next Day Delivery performance of single piece priority mail stands at 82% for 2020, a decline of eight percentage points since 2019. Performance is 12% below the ComReg target of 94%.
- Declines in performance were recorded across all regional mail flows during 2020 when compared to 2019. The most significant changes in performance were recorded for mail flowing to Dublin; with the performance for Anywhere to Dublin County down by ten percentage points to 80% and the performance for Outside Dublin County to Dublin County down by twelve percentage points to 77%.
- The performance of mail originating from Dublin during 2020 also dropped significantly versus 2019, with the Dublin County to Anywhere flow down nine percentage points to 81%, and the Dublin County to Dublin County (Local) flow down eight percentage points to 82%.

SUMMARY – II

- Comparing 2020 to 2019 across the different mail characteristics highlights that:
 - there were declines in performance across all induction methods. Post Box performance was hardest hit, down 10 points to 78% in 2020. Post Office performance fell by 8 points to 83% and Collection from Business performance dropped by 7 points to 90%.
 - performance levels also reduced across all mail types. The performance of Packets declined to 74% (down fourteen points) and the performance of both Standard Letters and Large Envelopes fell by 8 points, to 82% and 81% respectively.
 - performance of both Metered Mail and Stamped Mail fell back by eight points, to 85% and 80% respectively.

Delivery Within Three Days – 2020 Full Year Performance (1st January to 31st December 2020)

- Delivery of single piece priority mail Within Three Working Days stands at 97.4% for 2020. This measure is 2.1% below the ComReg target of 99.5%.

SUMMARY – III

January to November 2020 Performance (1st January to 31st March and 1st July to 30th November)

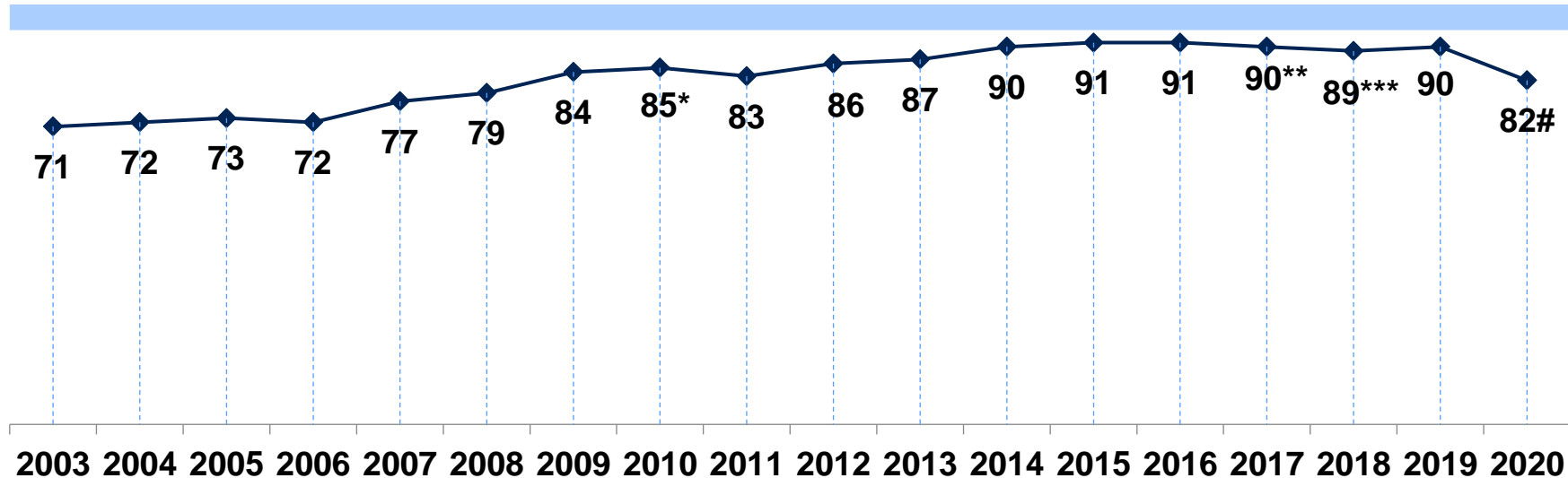
- Next Day Delivery performance of single piece priority mail in the period January to November 2020 was recorded at 87%, a five percentage point decline when compared to the same period in 2019. Delivery of single piece priority mail Within Three Working Days is at 98.7% for January to November 2020.

December 2020 Performance (1st to 31st December)

- Next Day Delivery performance of single piece priority mail for December 2020 stands at 42%, a 33 percentage point decline since December 2019. Delivery of single piece priority mail Within Three Working Days is at 86.8% for December 2020.

FINDINGS – FULL YEAR COMPARISONS

NATIONAL NEXT DAY DELIVERY (D+1) FULL YEAR – 2003 TO 2020



*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 2020#

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	82% (+/-1.3%)	84% (+/-1.6%)	80% (+/-2.1%)
POSTING (RoI)	From Dublin County	81% (+/-2.5%)	82% (+/-2.8%)	82% (+/-2.8%)
	From Outside Dublin County	82% (+/-1.5%)	85% (+/-1.9%)	77% (+/-2.5%)

1. () Figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 19,948
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) PERFORMANCE OF MAIL – FULL YEAR COMPARISONS

	2003 Jan to Dec	2004 Jan to Dec	2005 Jan to Dec	2006 Jan to Dec	2007 Jan to Dec	2008 Jan to Dec	2009 Jan to Dec	2010 Jan to Dec*	2011 Jan to Dec	2012 Jan to Dec	2013 Jan to Dec	2014 Jan to Dec	2015 Jan to Dec	2016 Jan to Dec	2017 Jan to Dec**	2018 Jan to Dec***	2019 Jan to Dec	2020 Jan to Dec #
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Anywhere to Anywhere	71	72	73	72	77	79	84	85	83	86	87	90	91	91	90	89	90	82
Anywhere to Local (Delivery within county of posting)	75	75	76	75	78	79	85	85	84	87	87	90	91	91	91	90	91	84
Anywhere To Dublin County	71	73	73	72	77	75	83	84	83	85	87	90	91	91	90	88	90	80
Dublin County to Anywhere	70	69	73	70	77	77	84	85	83	85	87	89	92	92	89	88	90	81
Dublin County to Dublin County (Local)	72	75	76	73	78	76	84	85	83	85	87	89	92	93	90	88	90	82
Outside Dublin County to Anywhere	73	73	73	75	77	80	84	85	83	87	87	91	91	90	91	90	90	82
Outside Dublin County to Local (Delivery within county of posting)	78	76	76	77	79	83	85	86	84	88	87	91	91	91	92	91	91	85
Outside Dublin County to Dublin County	68	70	68	70	75	74	81	83	82	84	87	91	89	89	90	87	89	77

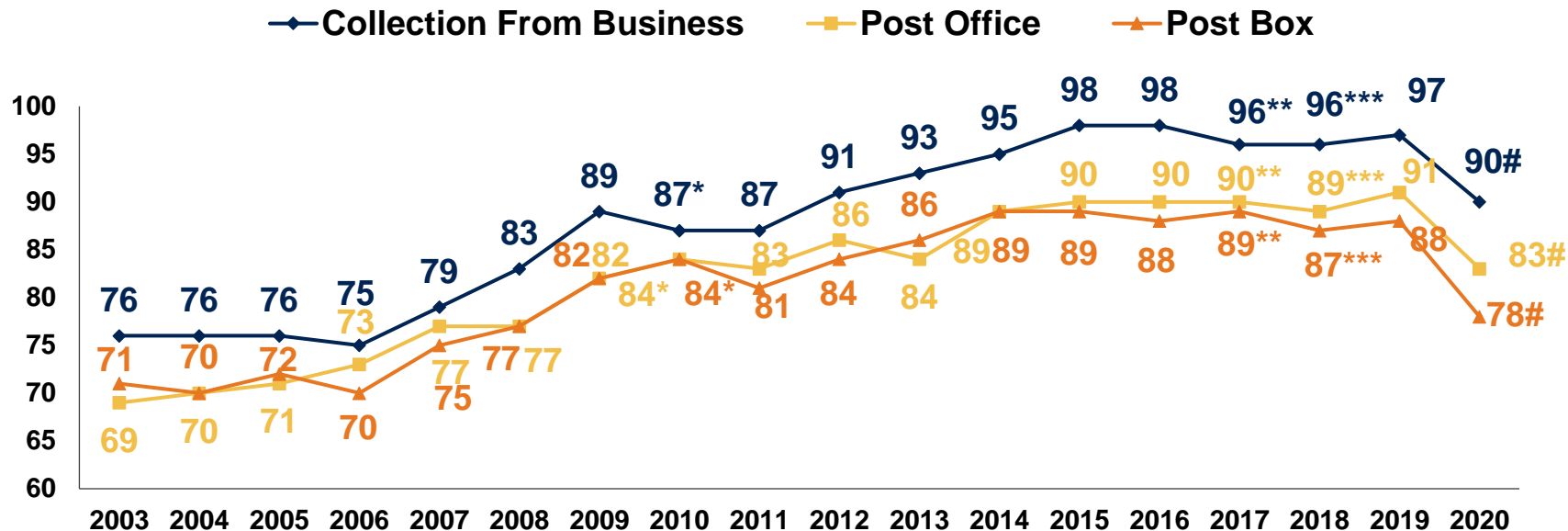
*The results shown for 2010 exclude items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods

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

**The results shown for 2018 exclude 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 INDUCTION METHOD 2003 TO 2020



*Metered Box items not reported due to small base sizes

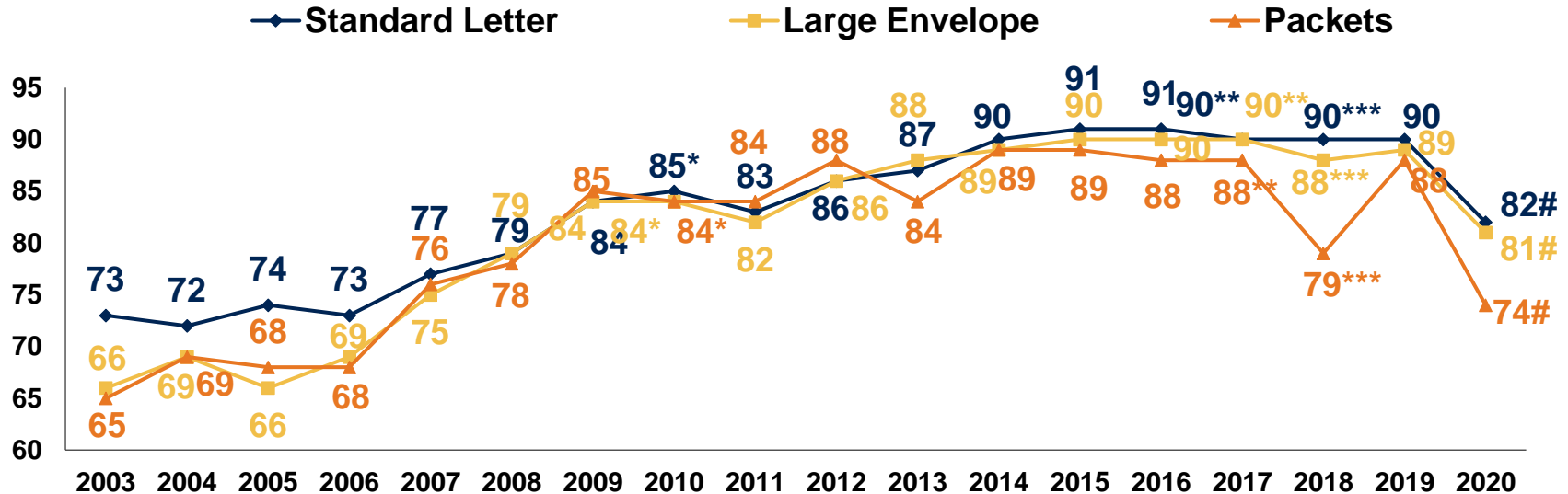
*The results shown for 2010 excludes items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.

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NEXT DAY DELIVERY (D+1) - BY MAIL FORMAT 2003 TO 2020



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.

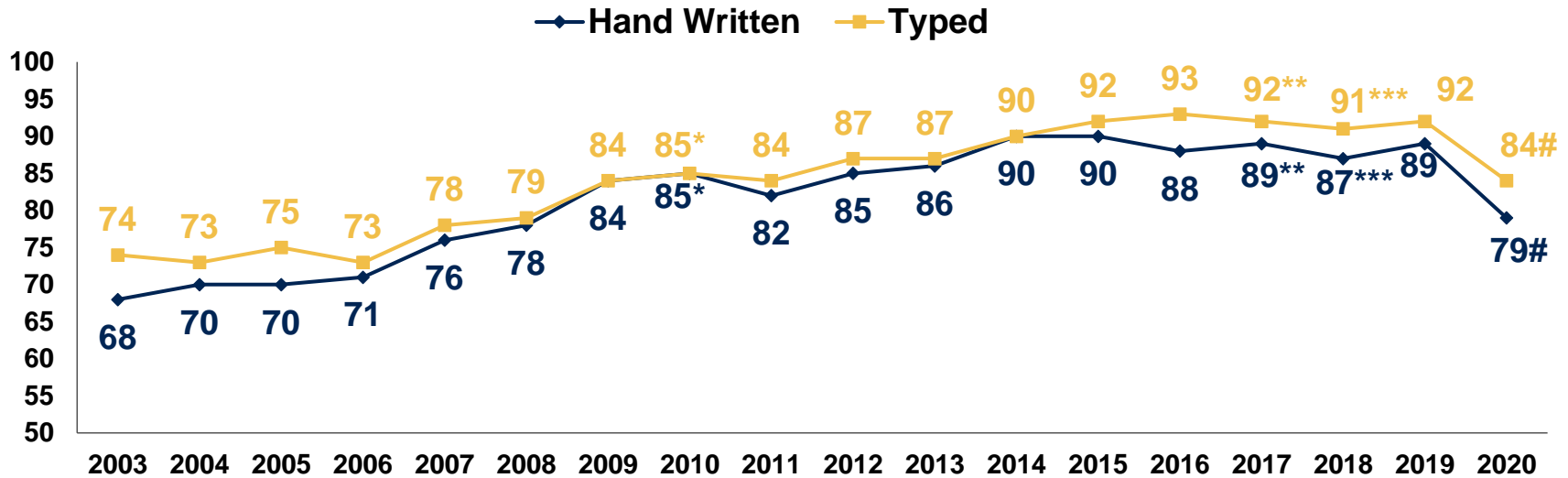
*The results shown for 2010 exclude items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.

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NEXT DAY DELIVERY (D+1) - BY ADDRESS METHOD 2003 TO 2020



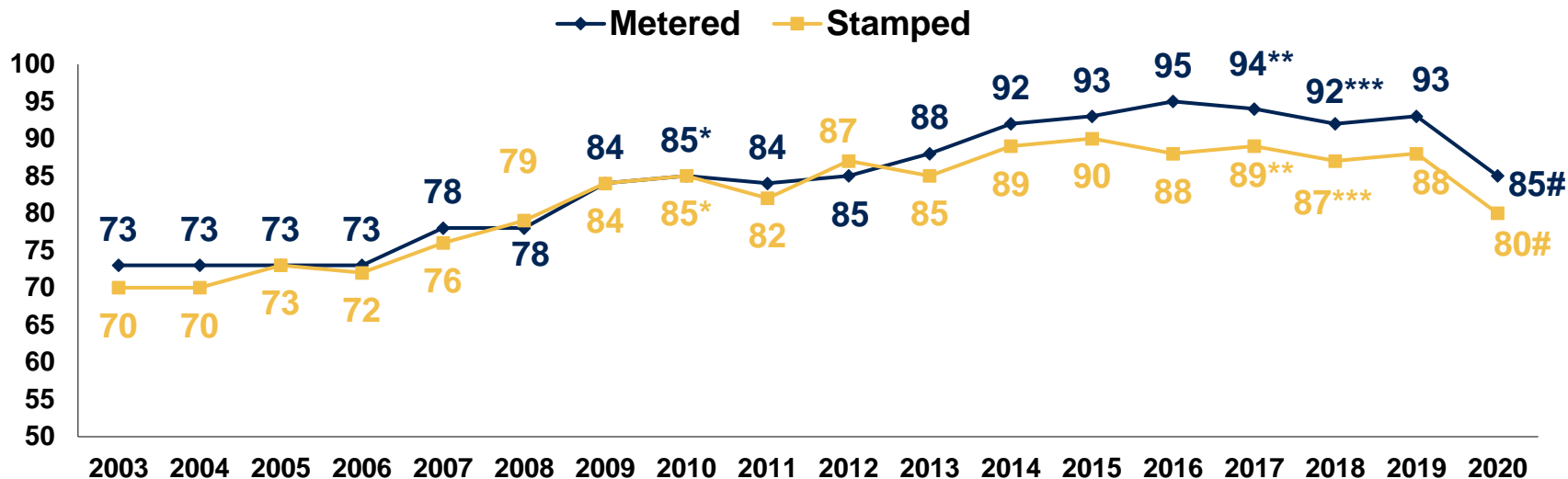
*The results shown for 2010 exclude items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods.

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

***The results shown for 2018 exclude 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 2020



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

***The results shown for 2018 exclude 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 2020#

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	97.4% (-0.5% to +0.3%)	97.6% (-0.7% to +0.4%)	96.7% (-1.0% to +0.6%)
POSTING (ROI)	From Dublin County	96.3% (-1.2% to +0.7%)	96.5% (-1.6% to +0.7%)	96.5% (-1.6% to +0.7%)
	From outside Dublin County	97.9% (-0.5% to +0.3%)	98.1% (-0.8% to +0.3%)	96.9% (-1.3% to +0.6%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 19,948
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DELIVERY WITHIN THREE DAYS (D+3) PERFORMANCE OF MAIL – FULL YEAR COMPARISONS

	2003 Jan to Dec	2004 Jan to Dec	2005 Jan to Dec	2006 Jan to Dec	2007 Jan to Dec	2008 Jan to Dec	2009 Jan to Dec	2010 Jan to Dec*	2011 Jan to Dec	2012 Jan to Dec	2013 Jan to Dec	2014 Jan to Dec	2015 Jan to Dec	2016 Jan to Dec	2017 Jan to Dec**	2018 Jan to Dec***	2019 Jan to Dec	2020 Jan to Dec #
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Anywhere to Anywhere	96	96	97	97	97	98	98	99	98	99	99	99	99	99	99	99	99	97
Anywhere to Local (Delivery within county of posting)	96	97	97	97	98	97	98	99	98	98	99	99	99	99	99	99	99	98
Anywhere To Dublin County	96	96	97	96	97	97	98	98	98	98	99	99	99	99	99	99	99	97
Dublin County to Anywhere	96	95	97	96	97	97	98	98	98	98	99	99	99	99	99	99	99	96
Dublin County to Dublin County (Local)	96	96	97	96	97	97	98	98	98	98	99	99	99	99	99	99	99	97
Outside Dublin County to Anywhere	96	97	97	97	98	98	98	99	98	99	98	99	99	99	99	99	99	98
Outside Dublin County to Local (Delivery within county of posting)	97	98	97	97	98	98	99	99	98	99	99	99	99	99	99	99	99	98
Outside Dublin County to Dublin County	94	96	96	96	97	97	98	98	98	99	99	99	99	99	99	99	99	97

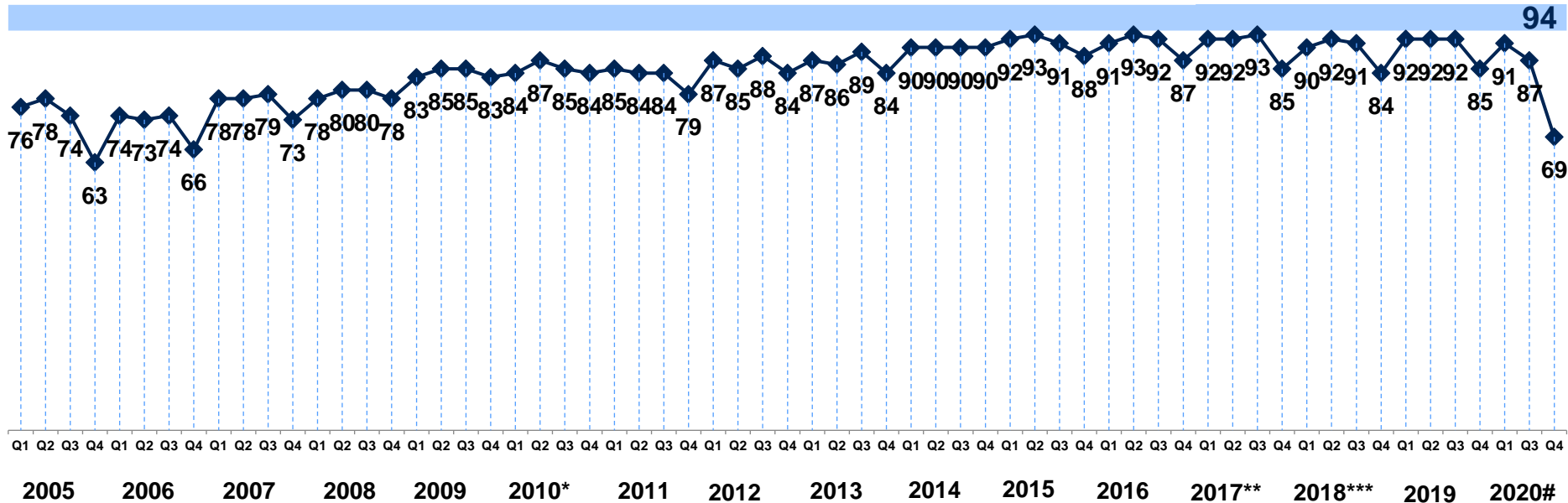
*The results shown for 2010 exclude items posted on or between 28th November-15th December and 17th December-30th December due to the unusual weather conditions experienced in those two periods

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

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

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NATIONAL NEXT DAY DELIVERY (D+1) - JAN 2005 TO DEC 2020 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

NEXT DAY DELIVERY (D+1) ITEMS POSTED ON OR BETWEEN 1ST JAN-30TH NOV 2020#

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	87% (+/-1.1%)	88% (+/-1.3%)	85% (+/-1.9%)
POSTING (RoI)	From Dublin County	87% (+/-2.1%)	87% (+/-2.4%)	87% (+/-2.4%)
	From Outside Dublin County	87% (+/-1.2%)	89% (+/-1.5%)	82% (+/-2.4%)

1. () Figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 17,724
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 2020#

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	98.7% (-0.3% to +0.2%)	98.8% (-0.5% to +0.2%)	98.4% (-0.7% to +0.3%)
POSTING (RoI)	From Dublin County	98.3% (-0.8% to +0.3%)	98.5% (-1.0% to +0.3%)	98.5% (-1.0% to +0.3%)
	From outside Dublin County	98.9% (-0.4% to +0.2%)	99.0% (-0.7% to +0.2%)	98.2% (-1.1% to +0.4%)

1. () figures in brackets relate to accuracy levels at 95% confidence

2. Total number of effective observations – 17,724

3. The postal county boundary is formed by the postal address as determined by An Post.

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NEXT DAY DELIVERY – DECEMBER



NEXT DAY DELIVERY (D+1) ITEMS POSTED ON OR BETWEEN 1ST-31ST DECEMBER 2020

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	42% (+/-5.4%)	46% (+/-6.8%)	38% (+/-7.4%)
POSTING (RoI)	From Dublin County	36% (+/-9.1%)	39% (+/-10.3%)	39% (+/-10.3%)
	From Outside Dublin County	45% (+/-6.6%)	50% (+/-8.7%)	37% (+/-7.8%)

1. () Figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 2,224
3. The postal county boundary is formed by the postal address as determined by An Post.

DELIVERY WITHIN THREE DAYS (D+3) ITEMS POSTED ON OR BETWEEN 1ST-31ST DECEMBER 2020

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
	From Anywhere	86.8% (-3.1% to +2.5%)	87.3% (-3.8% to +3.1%)	82.9% (-5.1% to +4.3%)
POSTING (RoI)	From Dublin County	80.0% (-6.9% to +5.2%)	80.7% (-7.3% to +5.6%)	80.7% (-7.3% to +5.6%)
	From outside Dublin County	89.7% (-2.9% to +2.3%)	90.9% (-3.8% to +3.0%)	86.6% (-6.4% to +4.2%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 2,224
3. The postal county boundary is formed by the postal address as determined by An Post.

METHODOLOGY



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.
- For November and December 2020, items posted before the LTOP on the Friday and delivered on the Saturday were included in the analysis as having arrived on the next working day, following confirmation from An Post that deliveries were provided on Saturdays in this period.
- 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 2018 RMS data was used in the statistical design of the January to December 2020 flows.
- All 2020 results were weighted to the 2018 RMS data.

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

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.

NON WORKING DAYS & DEROGATION DAYS

- The following Non Working Days and Derogation Days were applied in 2020:

01/01/2020	New Year's Day Public Holiday
17/03/2020	St. Patrick's Day Public Holiday
10/04/2020	Good Friday Derogation Day
13/04/2020	Easter Monday Public Holiday
04/05/2020	May Public Holiday
01/06/2020	June Public Holiday
03/08/2020	August Public Holiday
26/10/2020	October Public Holiday
24/12/2020	Christmas Eve Derogation Day for Collections only
25/12/2020	Christmas Day Public Holiday
26/12/2020	St. Stephen's Day Public Holiday
28/12/2020	Derogation Day
	All Saturdays (except in November and December)
	All Sundays

WEIGHTING

- In order to ensure that mail flows represent the 2018 RMS data, corrective weights are applied to the data.
- The weighting caps for each discriminant characteristic for January to December 2020 meet the requirements of section 7.3.2.2 of CEN.
- In addition, the weighting caps for each individual item for January to December 2020 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

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Dublin 1

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THANK YOU