



Republic Of Ireland Quality Of Postal Service Monitor - 2009 Report

Items Posted On Or Between 1st January & 30th September 2009

Introduction

- 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: 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 year-to-date and quarterly basis.
- This report presents the year to date findings for items posted on or between 1st January and 30th September 2009.
- Ipsos 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 Ipsos MRBI, on its behalf.

Summary - I

Next Day Delivery – 2009 Year To Date Performance

- For single piece priority mail, the year to date performance for Next Day Delivery stands at 84% for the period January to September 2009, up five percentage points from 79% for the same period in 2008. At 84%, Next Day Delivery performance falls short of the target of 94%, as set by ComReg.
- Year to date, mail posted Outside Dublin County for delivery in Dublin County achieves the lowest level of performance, at just 81% Next Day Delivery.
- It is interesting to note that year to date performance for Standard Letters, Large Envelopes and Packets have converged over the past six years.

Delivery Within Three Days – 2009 Year To Date Performance

- The year to date performance for Delivery Within Three Days for single piece priority mail stands at 98.3%, against a ComReg target of 99.5%.

Next Day Delivery – Q3 2009 Compared With Q2 2009

- For the period 1st July to 30th September 2009, Next Day Delivery for single piece priority mail remains at the same level recorded for 1st April to 30th June, at 85%.

Summary - II

- When Q3 2009 is compared with Q2 2009, no significant changes are observed in performance across the differing mail flows.
 - There is a slight improvement in the Dublin flows. Mail posted in Dublin to Dublin and mail posted in Dublin to Anywhere are up two percentage points (both flows are now at 85%) and mail posted Outside Dublin to Dublin is up one percentage point, to 84%.
 - There is a slight decrease in mail posted Outside Dublin to Anywhere (now at 85%) and mail posted Outside Dublin to within county of posting (now at 85%), of one percentage point and two percentage points respectively.
- Compared with Q2 2009, the following shifts are observed for the Next Day Delivery in Q3 2009 across the various discriminating characteristics;
 - The Collection From Business induction method has increased from 88% in Q2 2009 to 90% in Q3 2009 and is currently outperforming Post Box and Post Office induction at 84% and 82% respectively.
 - Performance of Packets and Standard Letters remain unchanged from last quarter, 85% for both. Large Envelopes has experienced a slight increase in performance from 84% to 85%.

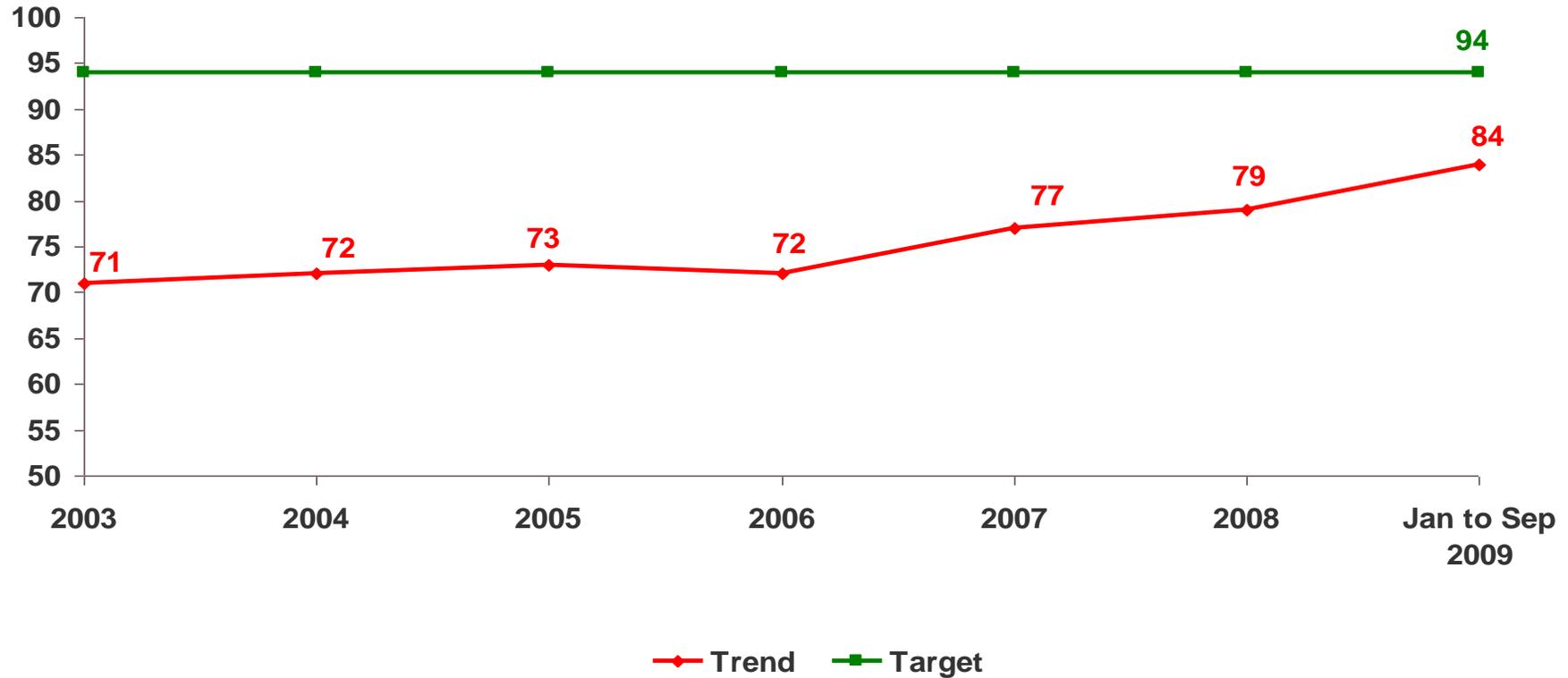
Summary - III

Delivery Within Three Days – Quarter 3

- In the period July to September 2009, 98.7% of single piece priority mail was delivered within three days of posting, against a ComReg target of 99.5%.

Findings
– Year To Date

National Next Day Delivery (D+1) Full Year – 2003 to 2009 YTD



Next Day Delivery Nationally (D+1) Items Posted On Or Between 1st Jan & 30th Sep 2009

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	84% (+/-1.1%)	85% (+/-1.6%)	83% (+/-2.2%)
	From Dublin county	84% (+/-2.1%)	84% (+/-3.1%)	84% (+/-3.1%)
	From outside Dublin County	84% (+/-1.0%)	85% (+/-1.5%)	81% (+/-2.4%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 21,416
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.

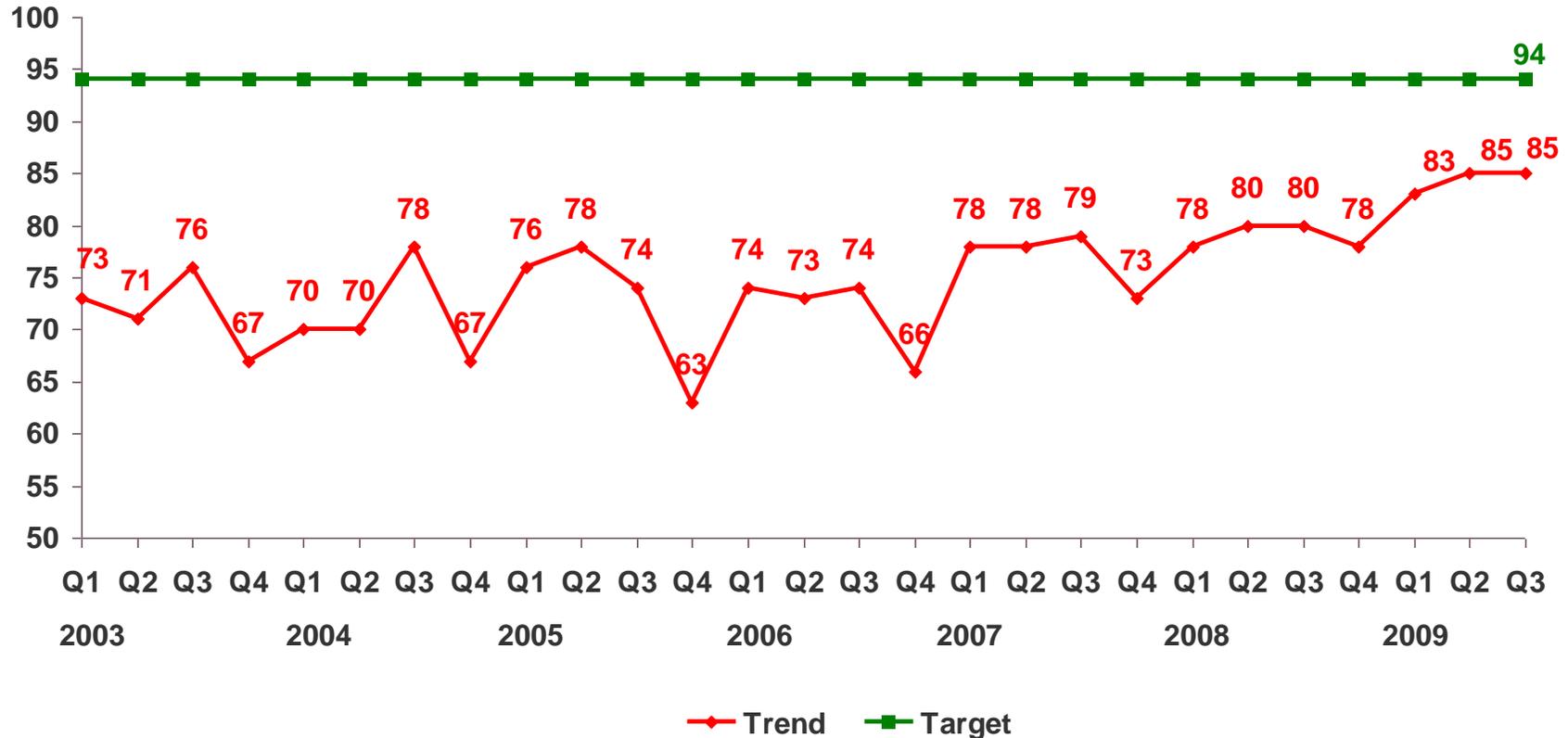
Delivery Within Three Days (D+3) Items Posted On Or Between 1st Jan & 30th Sep, 2009

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	98% (+/-0.3%)	98% (+/-0.4%)	98% (+/-0.5%)
	From Dublin County	98% (+/-0.5%)	98% (+/-0.7%)	98% (+/-0.7%)
	From outside Dublin County	98% (+/-0.3%)	99% (+/-0.4%)	98% (+/-0.6%)

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

National Next Day Delivery (D+1) January 2003 to September 2009 By Quarter



Quality Of Postal Service Targets With Quarterly & Full Year An Post Performance for RoI

	TARGET	ACHIEVED Q3 '09	ACHIEVED JAN-SEP '09
Next Day Delivery (D+1)			
From Anywhere to Anywhere	94%	85%	84%
From Dublin County to Anywhere	94%	85%	84%
From outside Dublin County to Anywhere	94%	85%	84%
Next Day Delivery (D+3)			
From Anywhere to Anywhere	99.5%	98.7%	98.3%

Next Day Delivery (D+1)

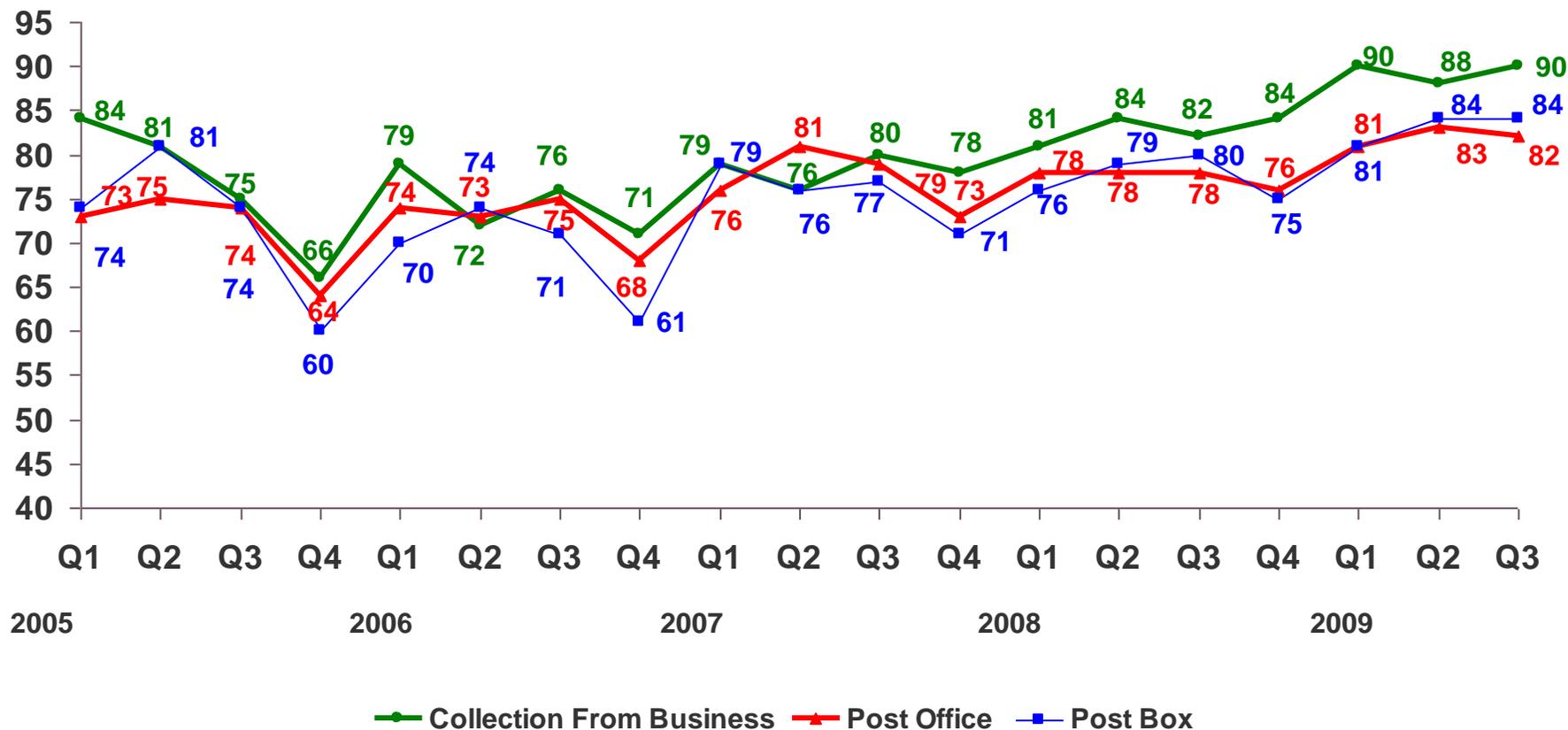
Items Posted On Or Between 1st Jul to 30th Sep, 2009

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	85% (+/-1.7%)	85% (+/-2.7%)	85% (+/-3.4%)
	From Dublin County	85% (+/-3.3%)	85% (+/-4.9%)	85% (+/-4.9%)
	From outside Dublin County	85% (+/-1.7%)	85% (+/-2.7%)	84% (+/-3.3%)

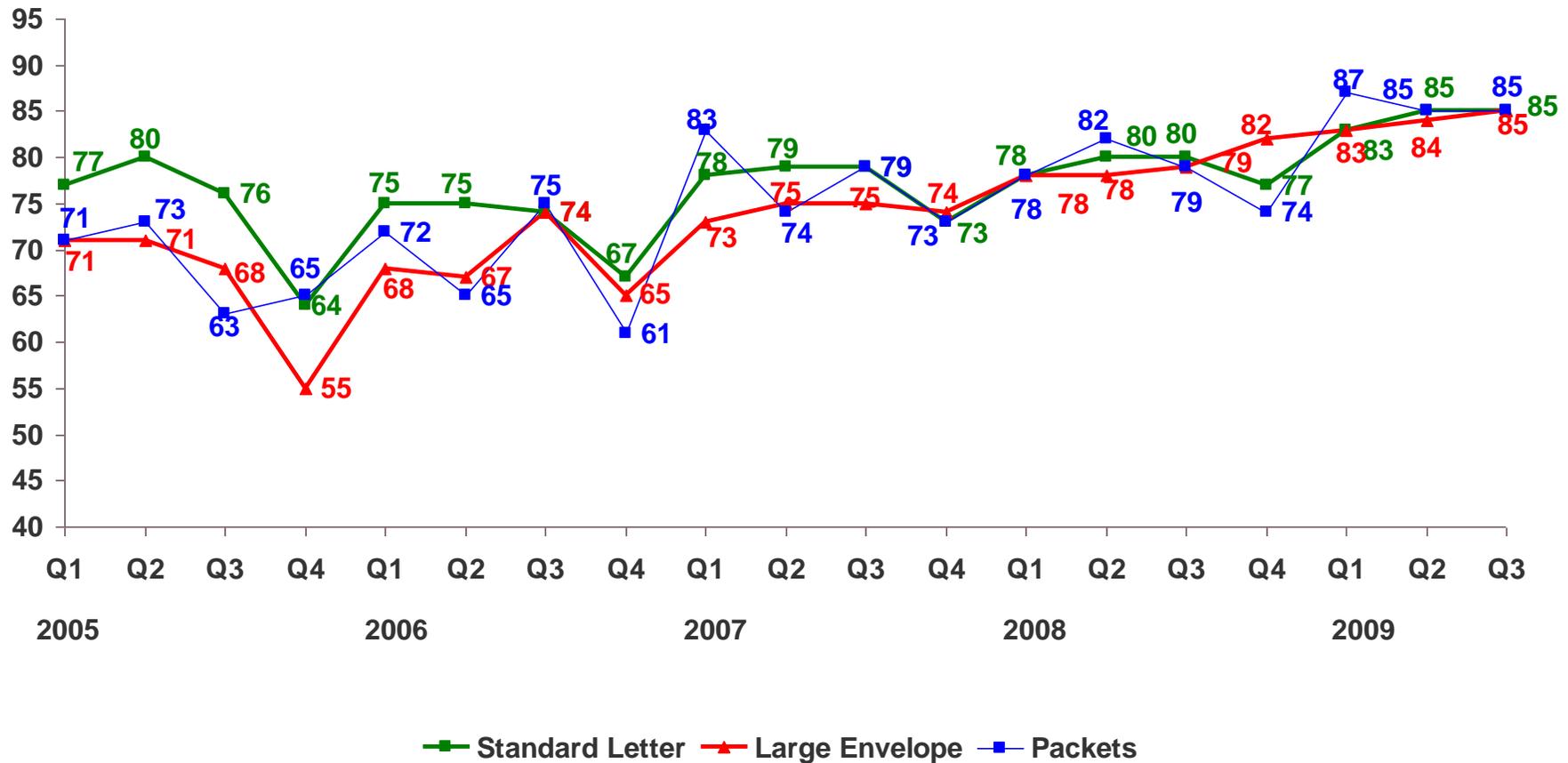
1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 7,021
3. Dublin County consists of the administrative areas of the Dublin City Council, Fingal County Council, South Dublin County Council and Dun Laoghaire – Rathdown County Council.

Next Day Delivery (D+1)

By Induction Method* - Jan 2005 to Sep 2009 By Qtr



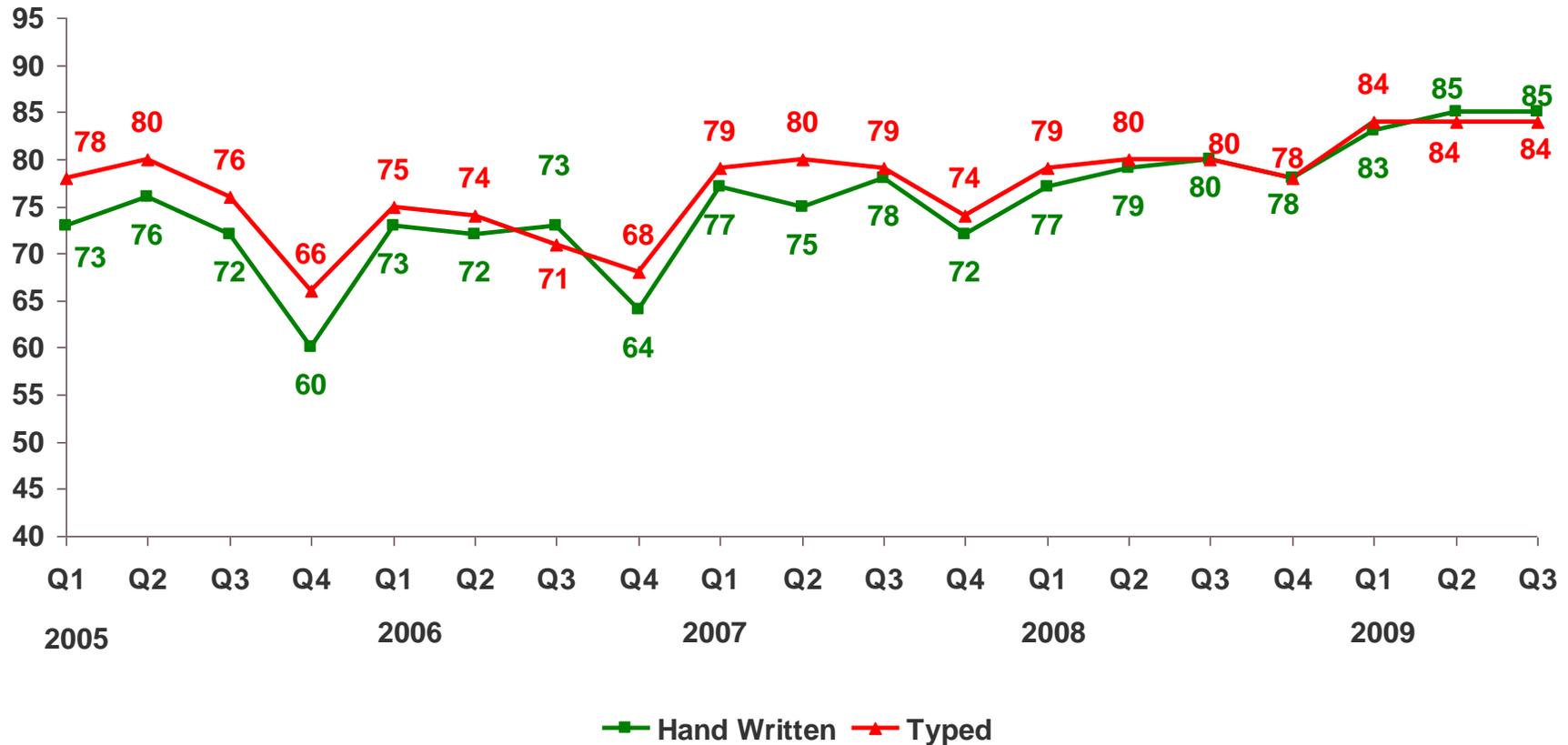
Next Day Delivery (D+1) By Mail Format* - Jan 2005 to Sep 2009 By Qtr



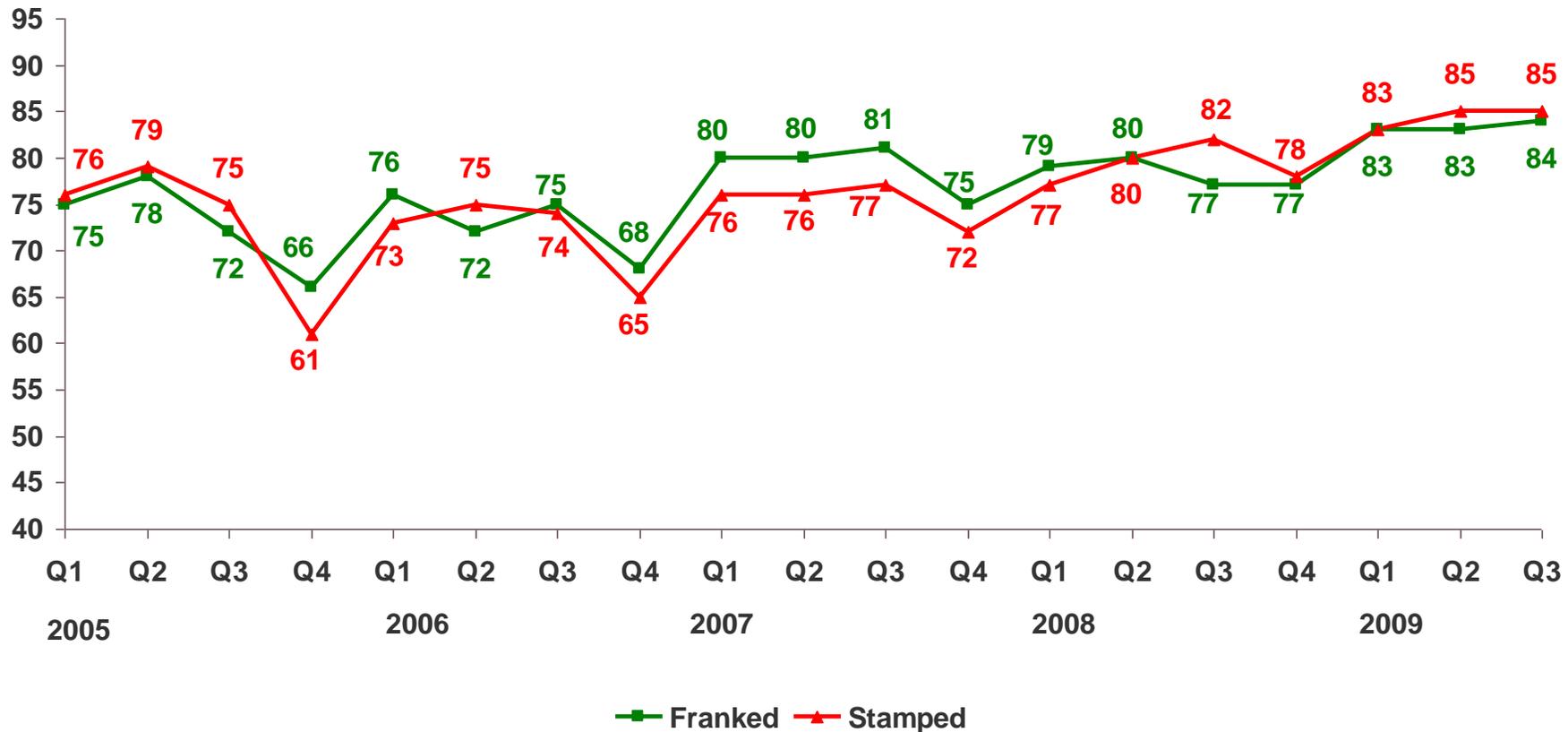
—■ Standard Letter —▲ Large Envelope —■ Packets

Next Day Delivery (D+1)

By Address Method - Jan 2005 to Sep 2009 By Qtr



Next Day Delivery (D+1) By Payment Type - Jan 2005 to Sep 2009 By Qtr



Delivery Within Three Days (D+3)

Items Posted On Or Between 1st Jul & 30th Sep, 2009

		DELIVERY (RoI)		
		To Anywhere	To Local (Delivery within county of posting)	To Dublin County
POSTING (RoI)	From Anywhere	99% (+/-0.4%)	99% (+/-0.6%)	99% (+/-0.7%)
	From Dublin County	99% (+/-0.7%)	99% (+/-1.0%)	99% (+/-1.0%)
	From outside Dublin County	99% (+/-0.4%)	99% (+/-0.6%)	99% (+/-0.8%)

1. () figures in brackets relate to accuracy levels at 95% confidence
2. Total number of effective observations – 7,021
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 Soye – Account Director
- Annette Farrell – Project Manager
- Silke Heinzl – Research Consultant



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