



Federation of Small Businesses
The UK's Leading Business Organisation



The FSB-ICM *Voice of Small Business* Panel: June 2010 Survey

Topline Results (Wednesday 7th July 2010)

- Results are based on an online survey carried out by 1,216 members of the FSB-ICM *Voice of Small Business* Panel. This represents a response rate of 27%.
- Surveys were completed 21st June and 5th July 2010.
- The data has been weighted by gender and region to match the known profile of the membership of the Federation of Small Businesses.
- Where results do not sum to 100%, this may be due to multiple responses, computer rounding or the exclusion of don't knows/not stated.
- Results are based on all respondents (1,216) unless otherwise stated.
- An asterisk (*) represents a value of less than one half of one percent, but greater than zero.
- Study undertaken by Guided Insight and ICM Research on behalf of the Federation of Small Businesses.

SECTION 4: Postal Services

This next section looks at business use of Royal Mail and delivery services in general.

1. **Royal Mail's universal service obligation is going to come under review. For each of the following proposals, please tell us if you would support or oppose it, if at all? PLEASE SELECT ONE ANSWER FOR EACH. ROTATE STARTING ORDER OF STATEMENTS**

		Support	Neither support nor oppose	Oppose	Don't know
Abolish the Saturday delivery and move to mail deliveries 5 days a week	%	19	20	59	2
Abolish separate 1 st and 2 nd class mail, replacing it with a single 2 to 3 day service, while retaining the existing "next day guaranteed" service	%	32	18	47	2
Retain the single, UK-wide pricing structure	%	82	13	2	3
Ensure that every part of the UK receives a postal service	%	94	4	*	1
Replace delivery to individual doors with delivery to appointed mail-boxes	%	5	10	83	2
Ensure mail delivery and final collection times are sufficiently far apart to allow reply to mail by return	%	57	35	3	6
Rather than collecting undelivered Royal Mail parcels at the Delivery Office, make it possible to collect them from the local post office	%	76	18	4	2
Allow carriers other than Royal Mail to leave parcels / packets which cannot be delivered	%	53	25	13	8
Introduce a wider range of new 'business mail' services and tariffs	%	46	34	11	9

2. **As a business customer of Royal Mail, would you be prepared to pay more for stamps and other postal services in return for improved services from Royal Mail? PLEASE SELECT ONE ANSWER.**

Base: All respondents in Scotland (122)

	%
Yes	45
No	51
Do not use Royal Mail	2
Don't know	2

3. **Approximately how many items do you despatch in an average week (e.g. letters and parcels)? PLEASE SELECT ONE ANSWER.**

	%
None/Not applicable	2
1-5 items	30
6-10 items	16
11-15 items	10
16-20 items	8
21-25 items	6
26-50 items	10
51-75 items	4
76-100 items	7
More than 100 items	5
Don't know/Can't remember	1

4. **What proportion of these items are parcels or express items? Please exclude catalogues ordered by an end consumer or company. By express delivery we mean next day delivery. PLEASE SELECT ONE ANSWER.**

Base: All who despatch mail weekly (1,185)

	%
None	31
1% - 5%	30
6% - 10%	9
11% - 15%	3
16% - 20%	4
21% - 25%	3
26% - 50%	10
Over 50%	9
Don't know/Can't remember	2

5. **What is the weight of a typical parcel or express item your business sends? For example an average letter/postcard weighs 20g, a CD weighs 100g-150g. PLEASE SELECT ONE ANSWER.**

Base: All who despatch parcels and/or express items (812)

	%
10g – 50g (i.e. a letter, invoice, post card or bank statement)	31
50g-100g (i.e. a lightweight catalogue, newsletter or small package such as seeds)	16
100g-500g (i.e. a light to medium magazine, or two paper back books)	21
500g – 750g (i.e. a thick magazine or a pair of shoes)	8
750g – 1.5 kg (i.e. a very thick catalogue such as Littlewoods)	5
1.5 Kg – 2 Kg (i.e. an i-pad)	3
A package larger than 2 Kg	11
Don't know/Can't remember	4

6. For each of the following, please tell us approximately what proportion is sent to other businesses (as opposed to consumer home addresses)? PLEASE SELECT ONE ANSWER FOR EACH

A) Your parcels or express items

Base: All who despatch parcels and/or express items (812)

B) Your letters (e.g. invoices and bills)

Base: All who despatch mail (1,185)

	A) Parcels or express items	B) Letters (e.g. invoices and bills)
	%	%
None	11	5
1% - 5%	15	12
6% - 10%	5	5
11% - 15%	3	2
16% - 20%	3	2
21% - 25%	3	2
26% - 50%	14	17
51% - 75%	5	7
76% - 100%	39	45
Don't know/Can't remember	3	2

7. What is the average price you pay for postage when despatching your typical parcels or express items to...? PLEASE SELECT ONE ANSWER FOR EACH

A) Other businesses

B) Other consumers

Base: All who despatch parcels and/or express items (812)

	A) Other businesses	B) Other consumers
	%	%
Under £1	22	20
£1 – £2	15	16
£2 – £3	10	9
£3 – £4	8	8
£4 - £5	7	6
£5 – £6	9	7
£6 - £7	3	3
£7 – £8	3	2
£8 - £9	3	2
£9 - £10	4	3
Over £10	4	3
Don't know/Can't remember	11	22

8. Which suppliers do you use to despatch your parcels or express items?
PLEASE SELECT ALL THAT APPLY

Base: All who despatch parcels and/or express items (812)

	%
Royal Mail/Post Office	84
Parcelforce	20
DHL	12
TNT	10
FedEx	9
City Link	7
UPS	7
APC Overnight	5
UK Mail Ltd	2
Fastway	2
Local/independent couriers	1
Other	7
Don't know/Can't remember	3

9. Approximately what proportion of your parcels or express items are sent via Royal Mail?
PLEASE SELECT ONE ANSWER.

Base: All who despatch parcels and/or express items (812)

	%
None	5
1% - 5%	8
6% - 10%	4
11% - 15%	2
16% - 20%	3
21% - 25%	2
26% - 50%	13
51% - 75%	5
76% - 100%	53
Don't know/Can't remember	4

10. Would you say you are despatching more or fewer parcels and express items this year compared to last year, or is it about the same? PLEASE SELECT ONE ANSWER.

Base: All who despatch parcels and/or express items (812)

	%
More	17
Fewer	32
About the same	48
Don't know/Can't remember	4

11. How much choice would you say you have when deciding which supplier to use when sending parcels or express items? PLEASE SELECT ONE ANSWER.

Base: All who despatch parcels and/or express items (812)

	%
A lot of choice	31
Some choice	40
Hardly any choice	21
No choice at all	7
Don't know	2

12. How often do you use another supplier which is not Royal Mail to despatch your parcels or express items? PLEASE SELECT ONE ANSWER.

Base: All who despatch parcels and/or express items (812)

	%
Daily	13
Weekly	14
Fortnightly	4
Monthly	5
Less than once a month	24
Don't know/Can't remember	6
Never	34

13. When using another supplier which is not Royal Mail, what service do you tend to use to despatch your parcels or express items? PLEASE SELECT ONE ANSWER.

Base: All who despatch parcels and/or express items and who use suppliers other than Royal Mail (543)

	%
Same day delivery	6
Next day guaranteed delivery by 9am/10am/10.30am	20
Next day guaranteed delivery by lunchtime	19
Next day guaranteed delivery by close of business	41
Two to three day service	22
Other	2
Don't know	3