



Postal Needs Follow up

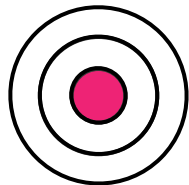
Summer 2020 Research



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Setting the scene

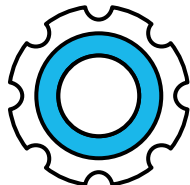


Objectives

In late 2019, Ofcom undertook qualitative and quantitative research to assess the needs of postal service users*.

Covid-19 and the measures used to tackle it have impacted society and consequently the use of – and perhaps expectations from – the postal service.

Follow up research was therefore needed to provide early insights into how Covid-19 *may* have affected views and use of the service.



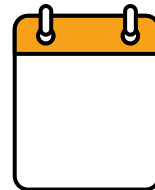
Method

Online research with a nationally representative sample of UK adults (16+)

2,366 x 15 minute interviews

Participants in Scotland, Wales and Northern Ireland were over-represented during fieldwork, to produce robust sample sizes for analysis.

The survey data has therefore been weighted to correct for this, with weights applied to age, gender and SEG within the nations, to match known population profiles.



Fieldwork

From 24th July – 6th August, 2020.

NB: At this time, the national lockdown had been lifted and non-essential shops had re-opened (with face masks required). However, it is worth noting that different rules applied across the nations and some local lockdowns were still in place (e.g. in Leicester)

Covid-19 is unlikely to be going away any time soon, so the timing was great to get a glimpse of what had happened to views and use of the postal service.

The reader should note that the fieldwork methodologies were different during late 2019 and the summer of 2020. The 2019 approach used a combination of face to face and online interviews, whereas the 2020 approach used only online interviews (as face to face fieldwork was unavailable due to Covid-19). Therefore, caution should be used when comparing the results from these two studies.

* Further information on the 2019 Postal User Needs research can be found [here](#) (insert link to the published Postal User Needs Research).



Key findings

Key Findings (1)

1

Overall

- Most attitudes and importance themes are consistent with the research that was undertaken prior to Covid-19
 - Universality of service, delivery to the door, affordability and certainty remain key
- Covid-19 has shifted behaviours to more online purchases and therefore the level of parcels received has increased
- Increased time at home has now meant that it is easier to order things to home
- There is now also more awareness and appetite to use Royal Mail competitors in the future
- Level of post sent however has declined – this is mostly driven by over 45s

2

Attitudes towards the Postal Service

- Attitudes towards the Postal Service remain broadly similar to research conducted prior to Covid-19
- There is more appetite to order goods that will be sent by post in the future due to being at home more
- Awareness of Royal Mail competitors has increased since Covid-19 began with under 45s particularly likely to use competitors more in the future

3

Reliance on the Postal Service

- The level of those feeling cut-off from society without frequent letter/parcel delivery remains stable with prior research
- Over 65s are more likely to agree to feeling cut-off if there was not a frequent letter delivery, whereas 16-34s would agree to feeling cut-off if there was not a frequent parcel delivery
- Those likely to agree for both letters/parcels are more likely to have been negatively affected by Covid-19 (i.e. by being made redundant or furloughed)
- 38% noticed the reduction in service with 39% of these people feeling negatively impacted by this (15% overall)

Key Findings (2)

4

Importance of Postal Service features

- Importance of Postal Service features remains in line with previous research – affordability remains key followed by reliability and then frequency
- Participants tend to rate the importance of postal service features for letters/parcels similarly (rather than think a feature is particularly important for letters but not parcels)
- There is slightly more support for central location pick-ups, but the majority still oppose this
- Support for universal pricing remains consistent

5

Behaviour since Covid-19: Adults

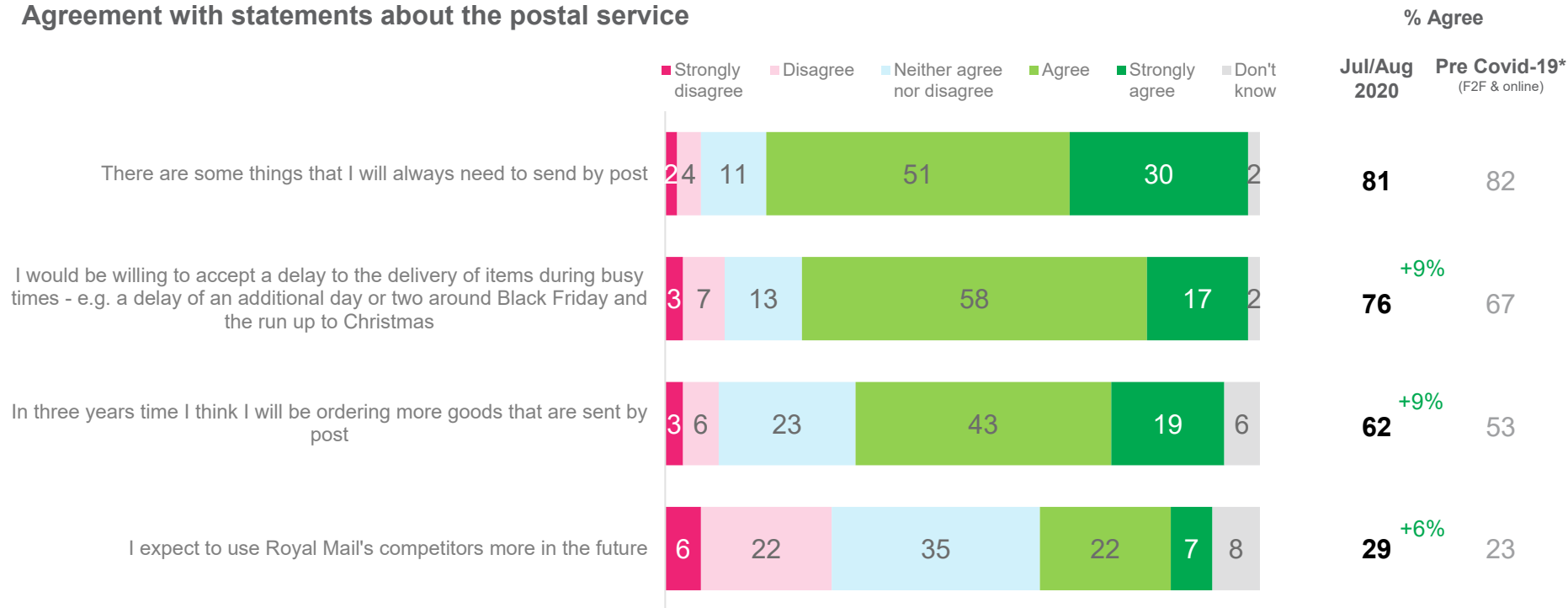
- Participants claimed to be sending slightly fewer letters but the same amount of parcels
- They noticed a significant reduction in the amount of letters received and a significant increase in the amount of parcels received
- Most prevalent behaviours since Covid-19 include: Allowing longer for post to arrive (48%), ordering non-food products online (47%) and using another means instead of letters (33%)
- Longer term, those who have ordered products online (grocery and non) are most likely to continue to do so



Attitudes towards the Postal Service

Compared to the pre Covid-19 research, our sample is more willing to accept delays at busy times, expect to order more goods sent by post, as well as expect to use Royal Mail's competitors more, in the future

Agreement with statements about the postal service

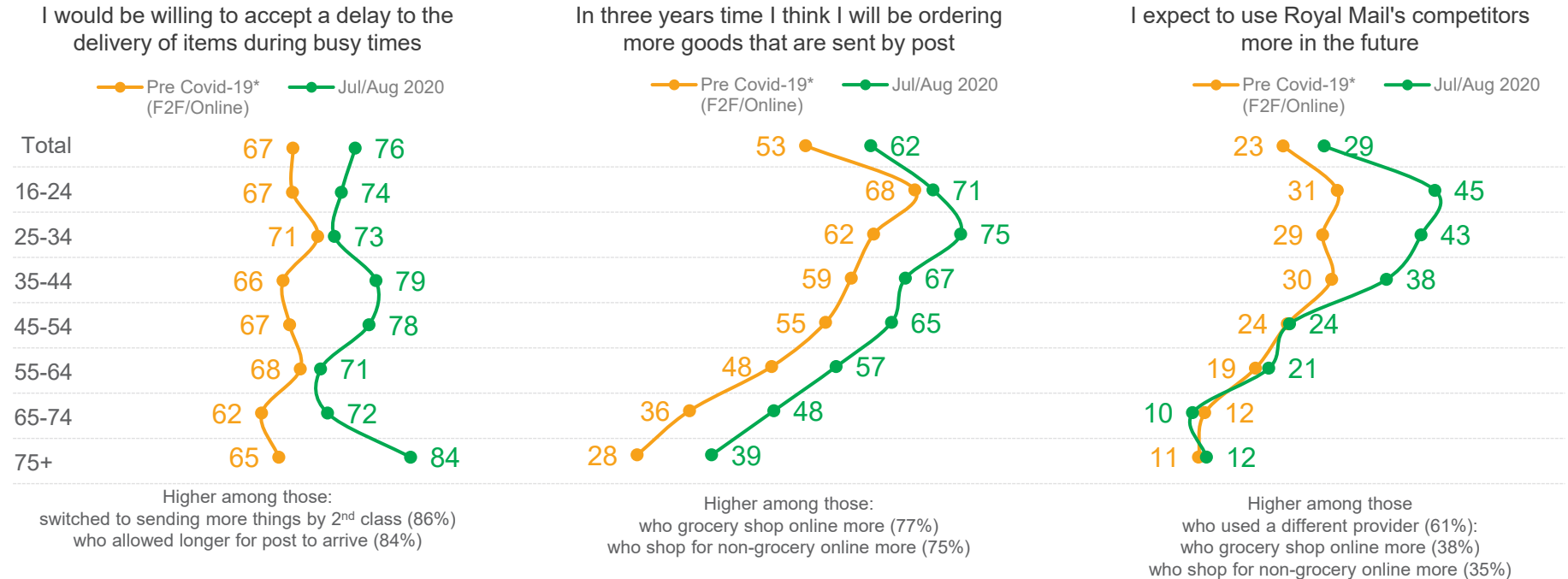


B1. How far do you agree or disagree with the following statements? Base: All participants (2366)

* Pre Covid-19 data is taken from the Residential Postal Needs Survey, 2,241 online and 2,355 face to face (CAPI) interviews conducted by Jigsaw Research in October/November 2019. Different methodological approach so use caution with comparisons.

The under 45s are driving higher future consideration of Royal Mail's competitors, other shifts in attitude are more evenly spread across the age groups

Agreement with statements about the postal service

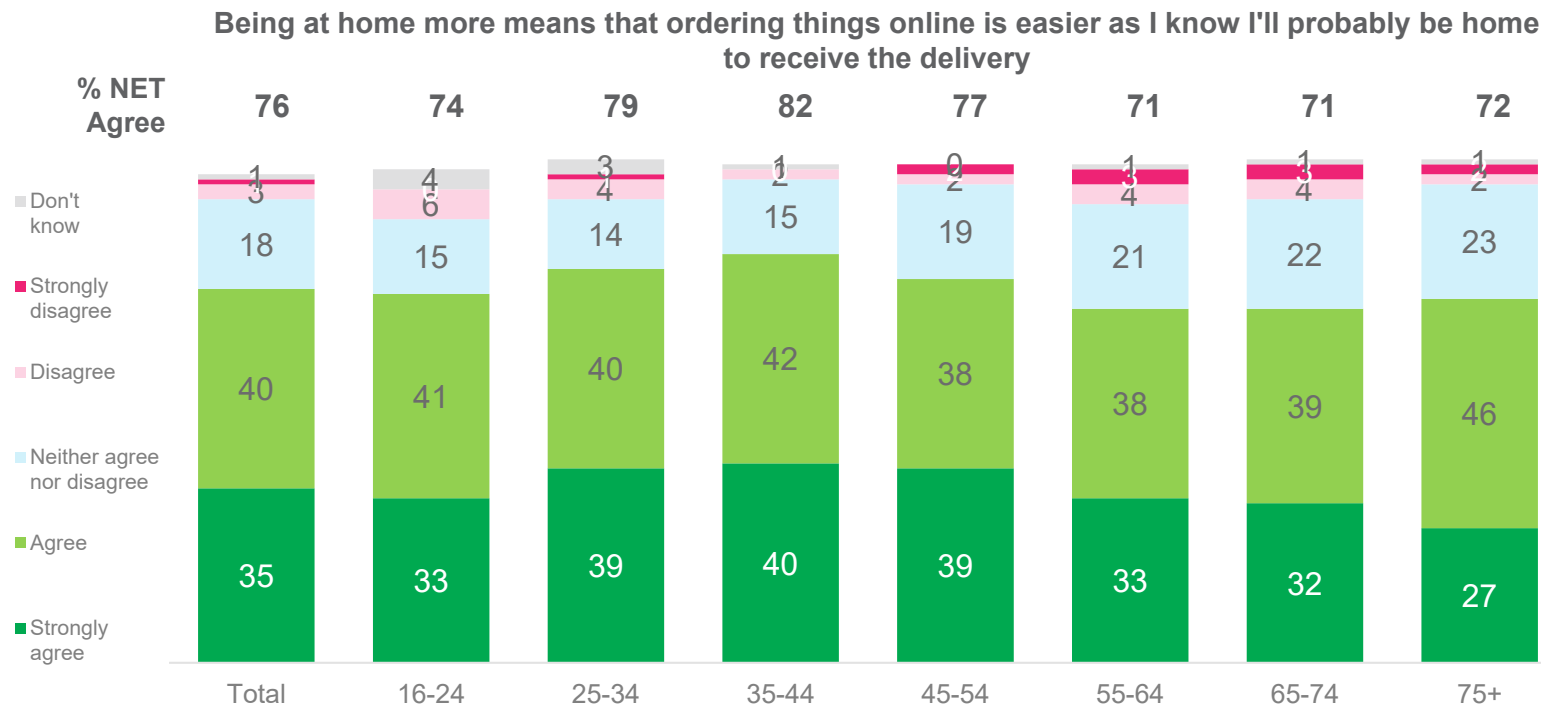


B1. How far do you agree or disagree with the following statements? Base: All participants (2366) 16-24 (338) 25-34(416) 35-44 (383) 45-54(408) 55-64(367) 65-74(254) 75+(200)

* Pre Covid-19 data is taken from the Residential Postal Needs Survey, 2,241 online and 2,355 face to face (CAPI) interviews conducted by Jigsaw Research in October/November 2019. Different methodological approach so use caution with comparisons.

Three quarters agree that being at home more means that ordering items online is easier

Agreement with statements about the postal service



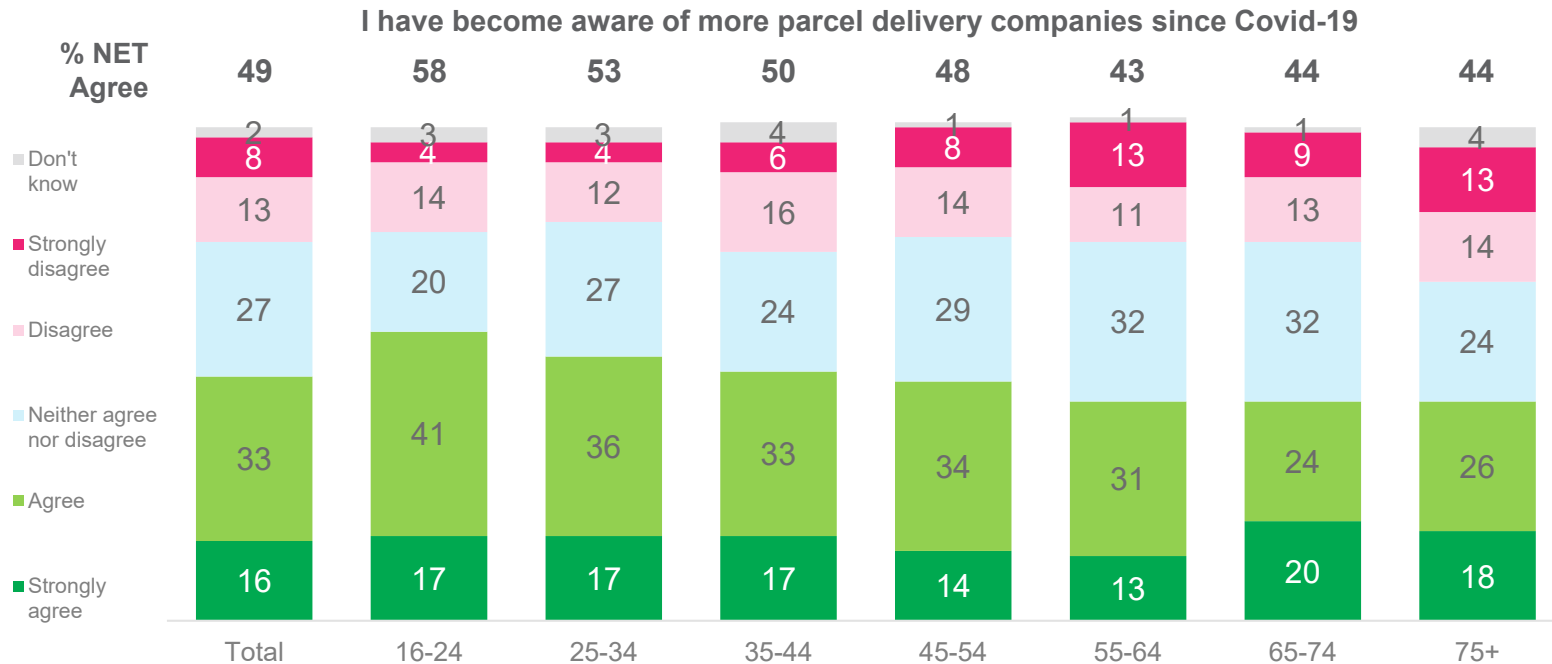
Higher among those who:

- Stopped commuting (79%)
- Worked less hours at workplace (78%)
- Avoided going out (78%)
- Worked from home (77%)
- Order online groceries more (85%)
- Order non-groceries online more (87%)
- Spend more time at home (83%)

C6. How strongly do you agree or disagree with the following statement about the postal service:
 Base: All participants (2366) 16-24 (338) 25-34 (416) 35-44 (383) 45-54 (408) 55-64 (367) 65-74 (254) 75+ (200)

Although under 35s are driving potential usage of RM competitors in the future, awareness of other providers has increased across all age groups since Covid-19

Agreement with statements about the postal service



C6. How strongly do you agree or disagree with the following statement about the postal service:

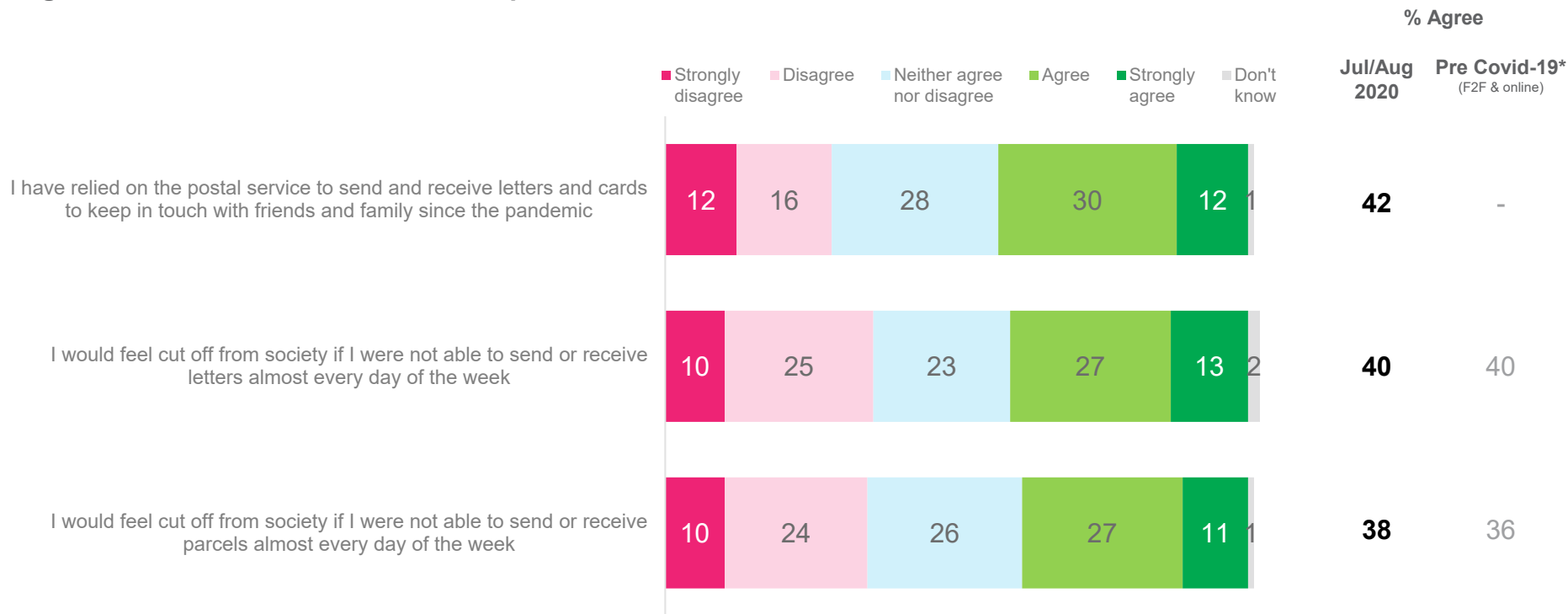
Base: All participants (2366) 16-24 (338) 25-34 (416) 35-44 (383) 45-54 (408) 55-64 (367) 65-74 (254) 75+ (200)



Reliance on the Postal Service

Levels of vulnerability remains consistent with the Pre Covid-19 research

Agreement with statements about the postal service



B1. How far do you agree or disagree with the following statements? C6. How strongly do you agree or disagree with the following statement about the postal service: Base: All participants (2366)

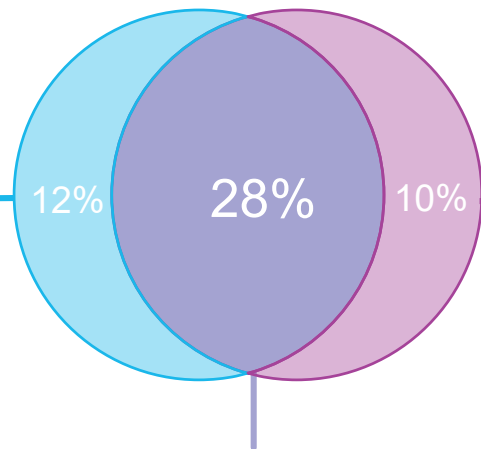
* Pre Covid-19 data is taken from the Residential Postal Needs Survey, 2,241 online and 2,355 face to face (CAPI) interviews conducted by Jigsaw Research in October/November 2019. Different methodological approach so use caution with comparisons.

Those who have been negatively impacted by Covid-19 are more likely to feel cut off from society if both letters and parcels were not delivered almost every day

Who feels cut off from society?

40%

Agree they would feel cut off from society if they were not able to send or receive **letters** almost every day of the week



38%

Agree they would feel cut off from society if I were not able to send or receive **parcels** almost every day of the week

More likely to be:

- 65+
- Been impacted by Covid-19 (i.e. Furloughed, made redundant, stopped commuting)

The 28% of people who agree with both are more likely to be:

- 35-44
- Remote Rural
- Been impacted by Covid-19 (i.e. Furloughed, made redundant, stopped commuting)

More likely to be:

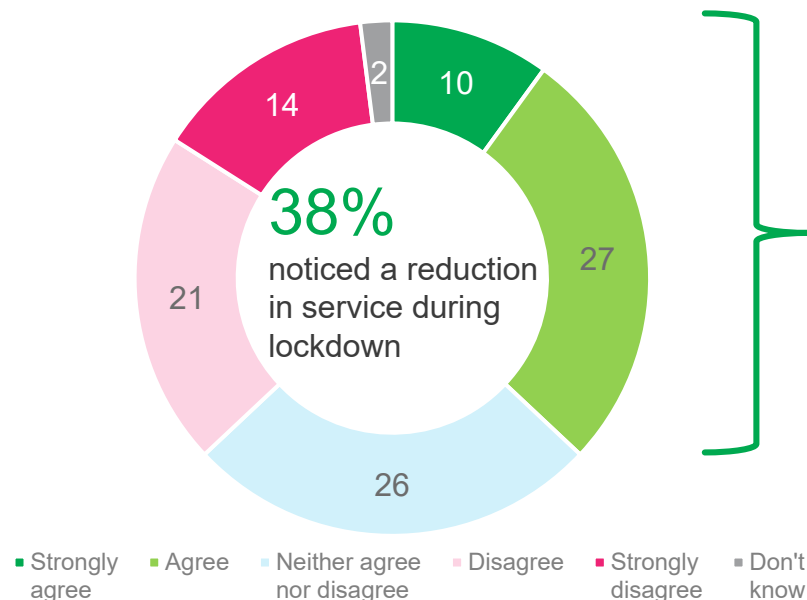
- 16-34
- Do more online grocery shopping

B1. How far do you agree or disagree with the following statements? Base: All participants (2366)

Around two in five noticed a disruption to the reliability of the service, two fifths of these felt negatively impacted by the disruption

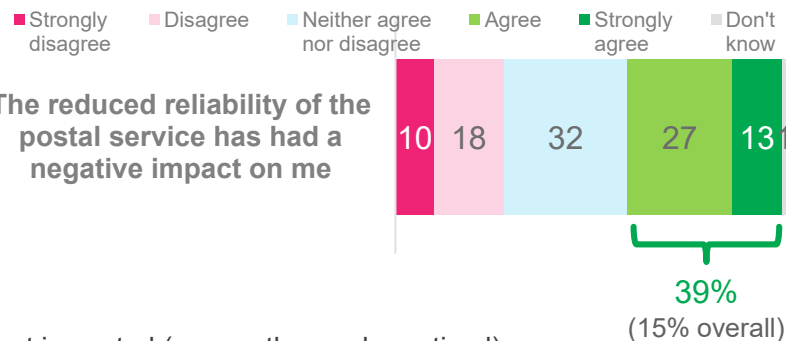
Reduction in service

I have noticed a significant reduction in the reliability of the postal service during the lockdown



C6. How strongly do you agree or disagree with the following statement about the postal service:
Base: All participants (2366) Noticed reduced reliability (901)

Among those noticing a reduction in service



Most impacted (among those who noticed):

- 58% among those who were made redundant
- 47% among those in Scotland
- 46% among those who have been advised to shield/had to isolate
- 45% among those who would feel cut off from society if they could not send/receive **parcels** almost every day

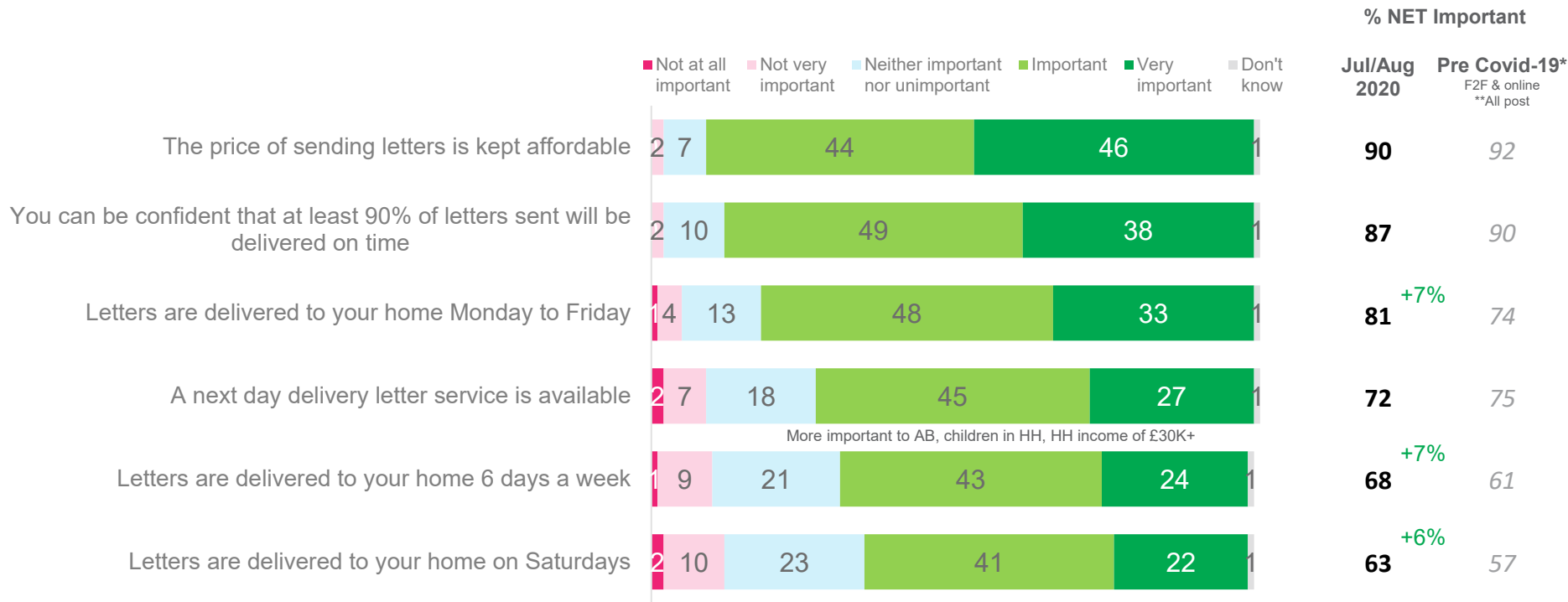
C6e. How strongly do you agree or disagree with the following statement about the postal service:
Base: Noticed reduced reliability (901)



Importance of Postal Service features

Affordability and certainty are the most important features of the postal service when thinking about letters and greetings cards

% Importance of postal service features – Letters and greetings cards

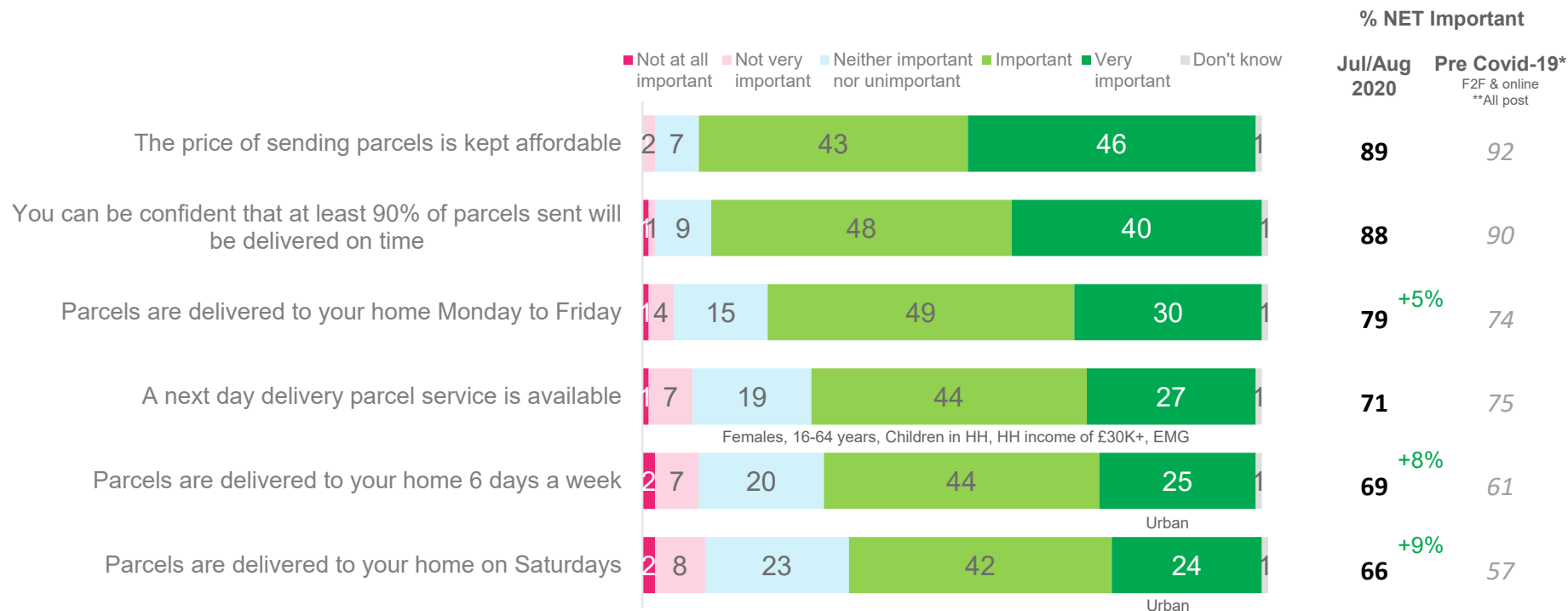


B2A. Thinking about letters and greeting cards, how important is it to you that... Base: All participants (2366)

All features are more important to those that would feel cut off from society if unable to send/receive letters every day and those sending 'more' letters/parcels
All features are less important to those with a HH income <£11.5k. No differences reported by rurality, nation, region, level of isolation or those that are housebound.

The same trends are observed for parcels

% Importance of postal service features - Parcels

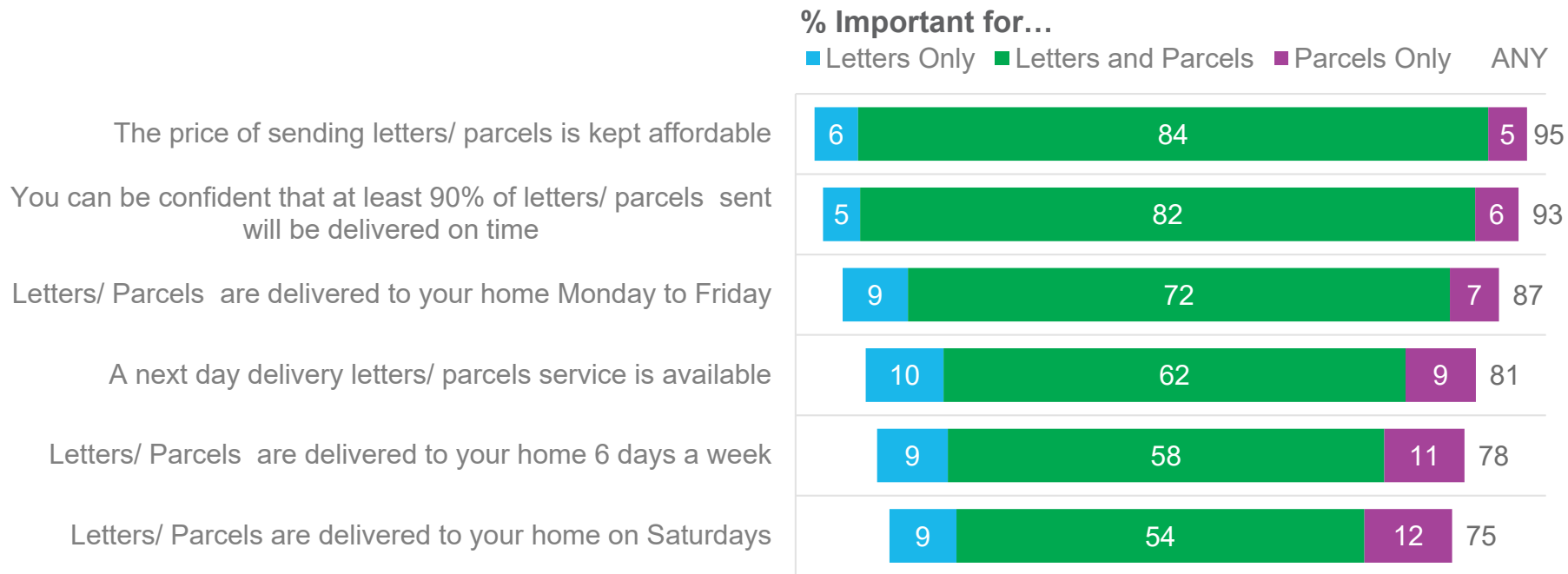


B2B. Thinking about Parcels, how important is it to you that... Base: All participants (2366)

All features are more important to those that would feel cut off from society if unable to send/receive parcels every day, those with kids in the HH and those sending 'more' letters/parcels.
All features are less important to those with a HH income <£11.5k and 75+ years. No differences reported by SEG, nation, region, level of isolation or those that are housebound.

Participants are more likely to say that each feature is important for both Letters and Parcels rather than just important for one type of post

% Importance of postal service features – Letter & Parcel comparison



B2A. Thinking about letters and greeting cards, how important is it to you that... B2B. Thinking about Parcels, how important is it to you that...

Base: All participants (2366)

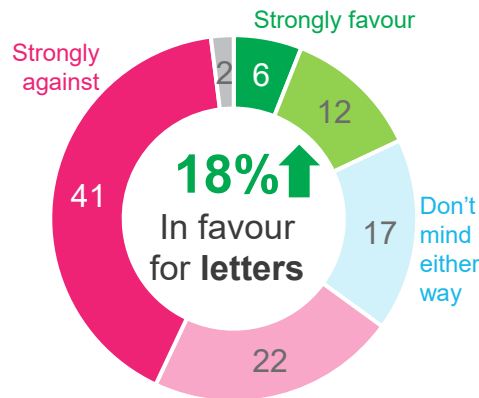
Two thirds remain against the idea of central lockers for letters

% in favour of central location pick-ups



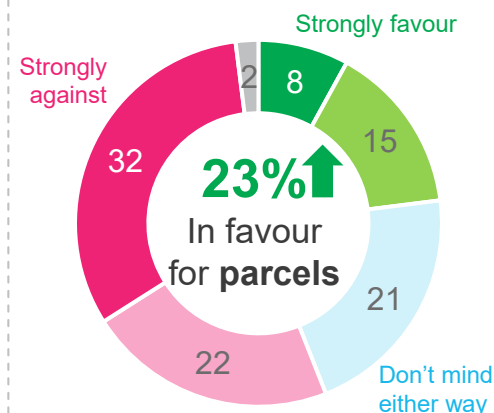
Instead of **letters / parcels** being delivered to your door, they would be delivered to a secure locker in a central location (such as a local post office, shop, petrol station or train station)

This would not be a personal locker, but a central bank of lockers. If you needed to pick something up you would be sent a code via SMS or email which you could use to access the locker. The postman/woman would leave your letters in the locker for you to come and pick up at a convenient time.



11% in favour Pre-Covid* - F2F & Online
76% against Pre-Covid* - F2F & Online

Younger demographics more likely to favour idea (28% 16-34, 20% 35-54, 8% 55+)
As are ethnic minority groups (38% vs 16% white) and those in London (33%)



17% in favour Pre-Covid* - F2F & Online
65% against Pre-Covid* - F2F & Online

Younger demographics more likely to favour idea (33% 16-34, 27% 35-54, 11% 55+)
As are ethnic minority groups (37% vs 21% white) and those in London (36%)

B3A/B. Please click on the scale below to indicate how strongly your favour each idea, if at all. Base: All participants (2366)

* Pre-Covid data is taken from the Residential Postal Needs Survey, 2,241 online and 2,355 face to face (CAPI) interviews conducted by Jigsaw Research in October/November 2019. Different methodological approach so use caution with comparisons.

Two thirds agree that the postal service should be the same price for all, no matter where you send your letter or parcel (no change from pre Covid-19)

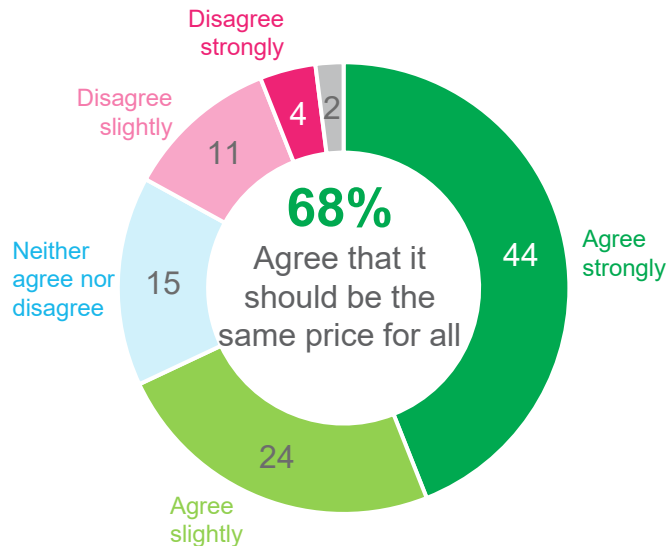
% Agreement with universal pricing



Royal Mail is currently required to provide certain services and meet certain minimum standards for some of the services it provides.

They currently provide these services at the same price to all – so, the cost of a stamp is the same regardless of where you send your letter or parcel to within the UK.

An alternative to this, is that their prices could vary according to where you send your letter or parcel – so, the cost of a stamp would be cheaper if you were to send a letter or parcel locally and more expensive if you were to send it further away.



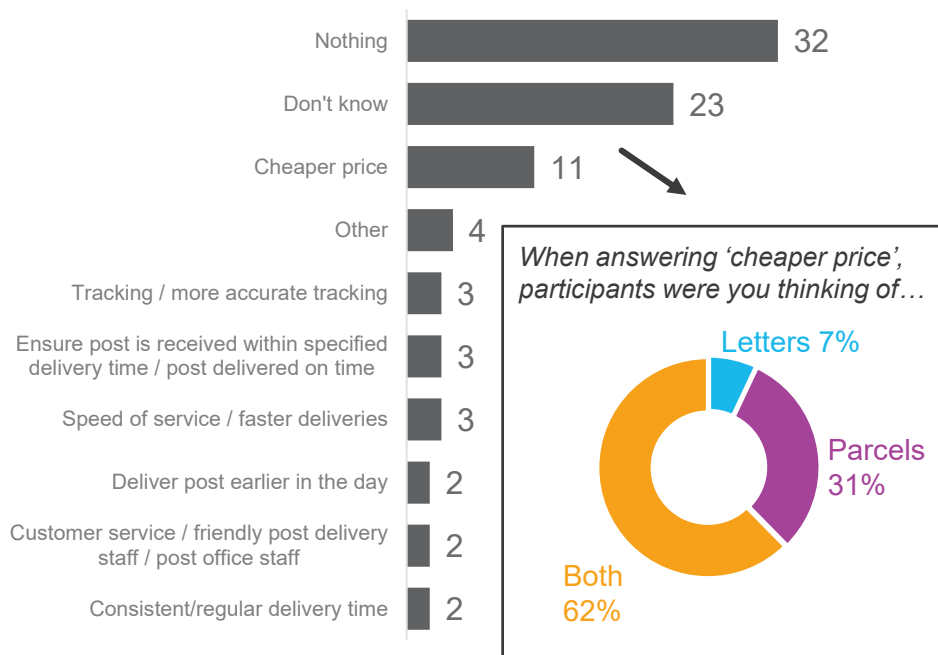
More likely to agree if you live in Scotland (76%) or Northern Ireland (74%)

B4. How strongly do you agree or disagree that Royal Mail should provide its services at the same price to all, regardless of where a letter or parcel is sent within the UK? Base: All participants (2366)

* Pre Covid-19 data is taken from the Residential Postal Needs Survey, 2,241 online and 2,355 face to face (CAPI) interviews conducted by Jigsaw Research in October/November 2019. Different methodological approach so use caution with comparisons.

Less than half of our sample were able to mention a desired improvement to Royal Mail's postal service. The most popular mention was a cheaper service

% Improvements for the Royal Mail



Mentions with 1%:

- Delivery of post seven days a week, including Sundays
- Ensure post is not damaged
- Ensure post does not get lost/stolen whilst in the system
- More flexible about delivery options / redeliver if not in / don't take parcels back to delivery office
- Reliability
- More post offices / reopen sub post offices
- Longer opening hours at post office/delivery office/depot
- More staff
- Second delivery / twice a day / more deliveries
- Timing
- Re-nationalise
- Improve service / more efficient service
- Delivery to correct address
- Treat staff better / better pay for staff
- Don't leave missed delivery card when didn't ring doorbell / give more time to get to door
- Collect parcels from home / collection point (boxes) for parcels with no need to go to post office

B5. If you could choose one thing to improve about Royal Mail's postal service, what would it be? B6. When you gave that answer, were you thinking of...

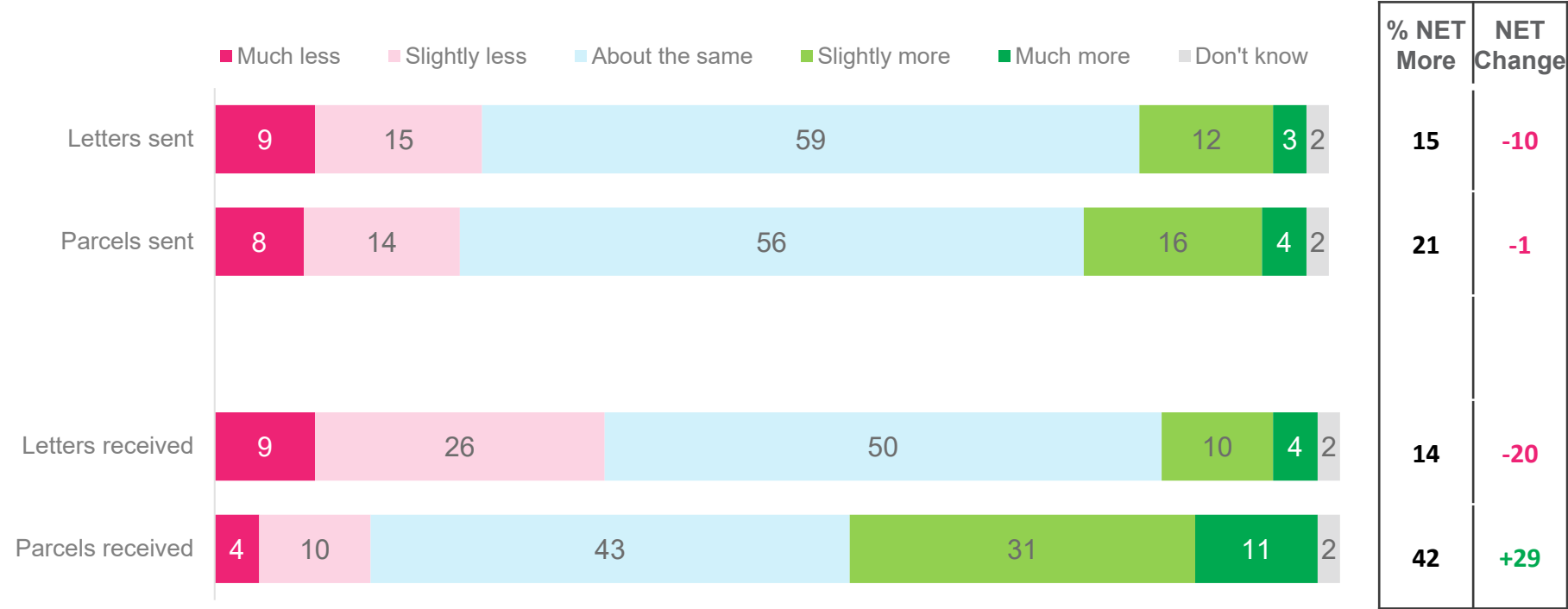
Base: All participants (2366) Those saying 'Cheaper Price' (271)



Behaviour since Covid-19

There has been an increase in the volume of parcels received, but the volume of parcels sent has remained fairly stable (increases have been offset by reductions). The volume of letters sent and received have both declined.

% Volume of post sent/received

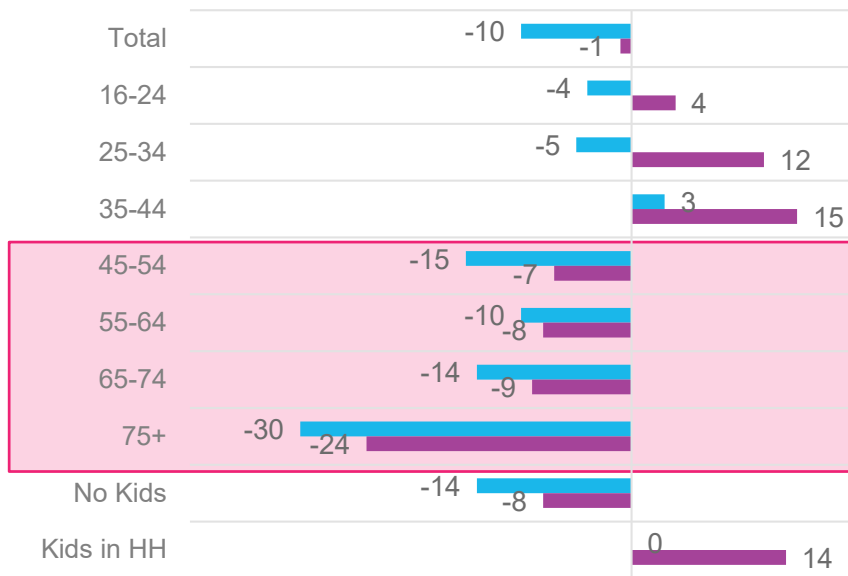


C4. How do you think each of the following have changed, if at all, compared to before the pandemic?
Base: All participants (2366)

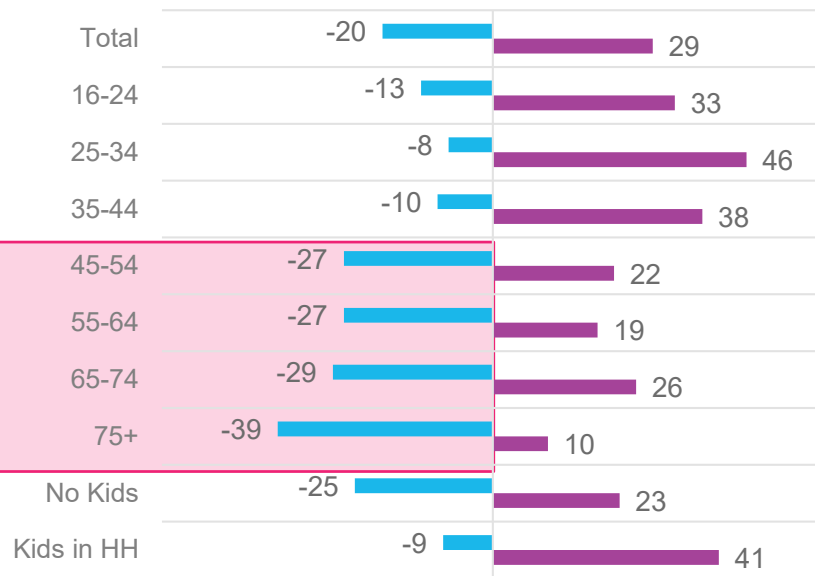
Over 45s are more likely to have reduced the level of both letters and parcels sent compared to before Covid-19

% who claim to have received more or less post than before the pandemic– NET Change

■ Letters Sent ■ Parcels Sent



■ Letters Received ■ Parcels Received

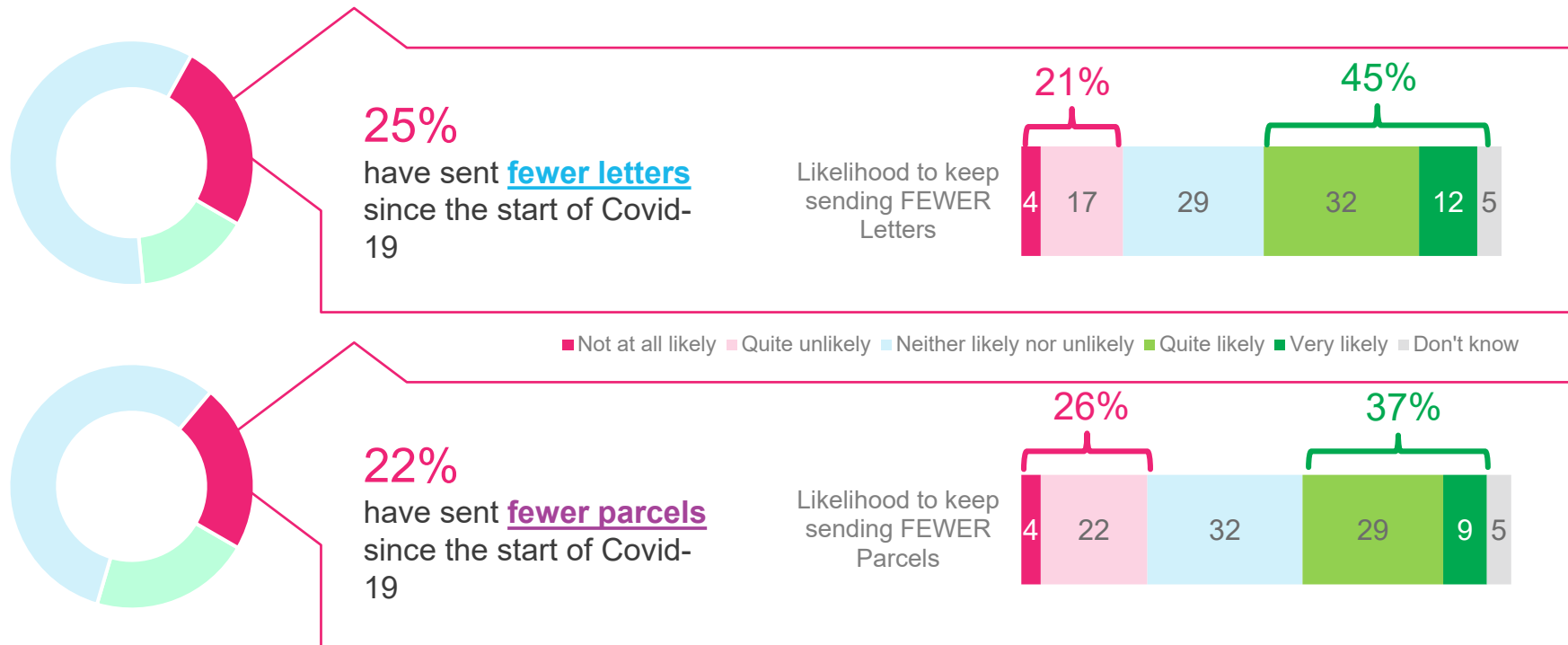


C4. How do you think each of the following have changed, if at all, compared to before the pandemic?

Base: All participants (2366) 16-24 (338) 25-34 (416) 35-44 (383) 45-54 (408) 55-64 (367) 65-74 (254) 75+ (200) No Kids (1674) Kids (692)

Under half (45% and 37%) of those who have sent fewer letters and parcels will continue to send less after Covid-19

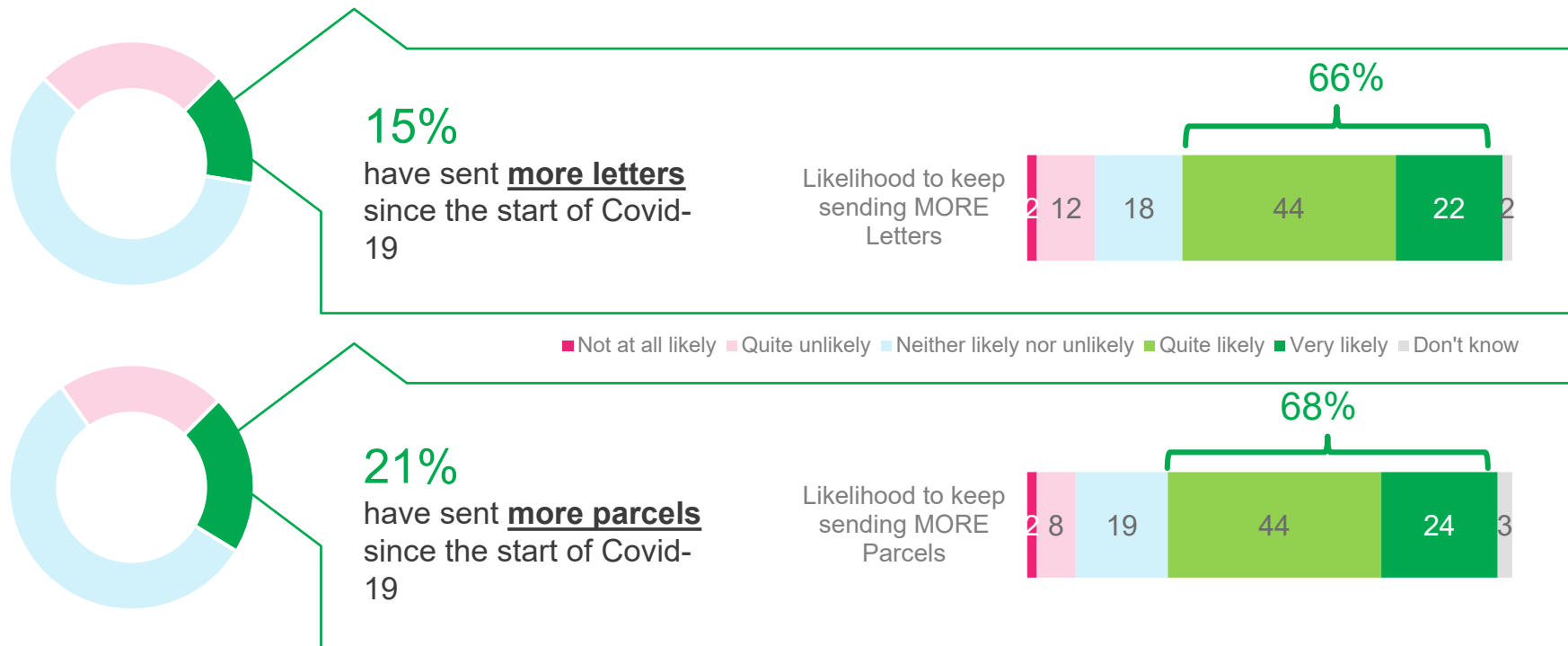
Likelihood of continuing to send LESS post



C4. How do you think each of the following have changed, if at all, compared to before the pandemic? C5b And how likely, if at all, are you to keep sending FEWER of the following after the pandemic?
Base: All participants (2366)

Conversely, the majority (66% and 68%) of those sending more letters and parcels will continue to do so after Covid-19

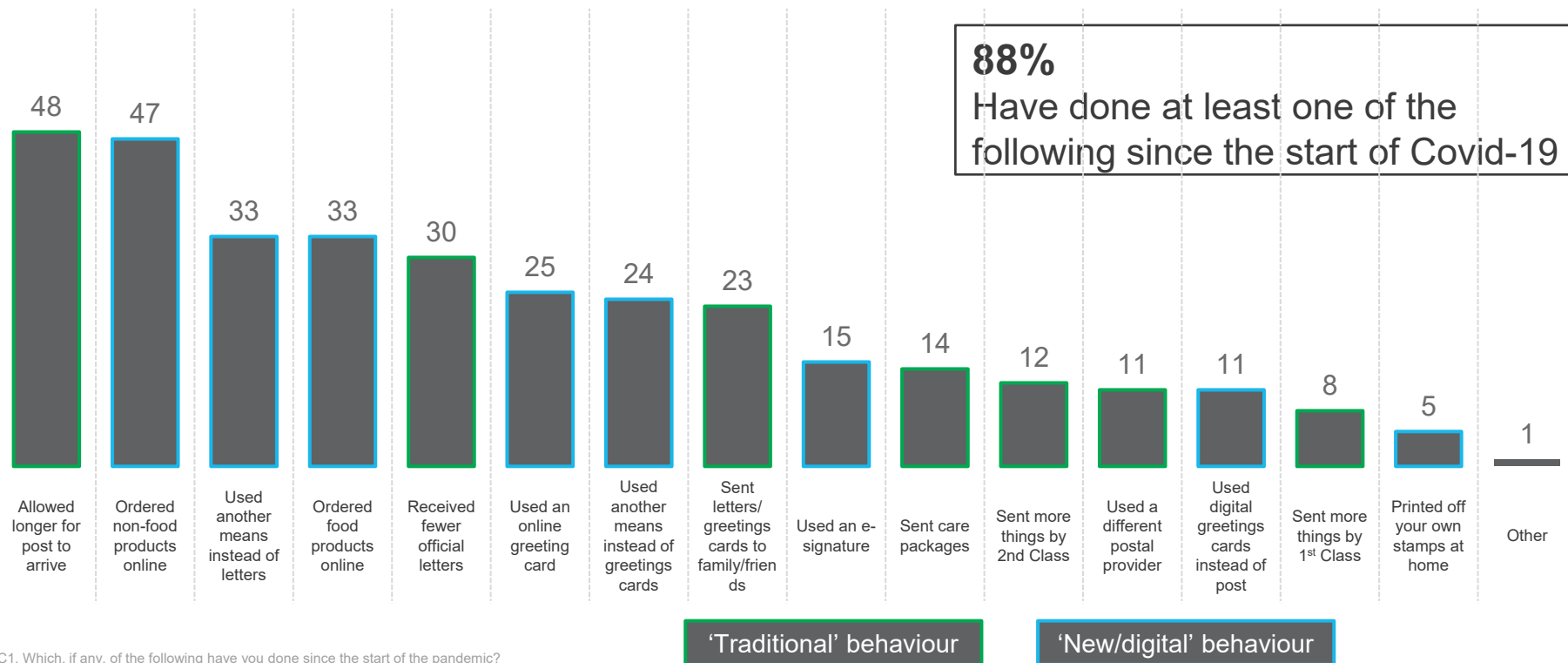
Likelihood of continuing to send MORE post



C4. How do you think each of the following have changed, if at all, compared to before the pandemic? C5a.2. And how likely, if at all, are you to keep sending MORE of the following after the pandemic?
Base: All participants (2366)

Common behaviours since the start of Covid-19 include allowing longer for post to arrive and ordering non-food related products online. A third have used another means instead of letters

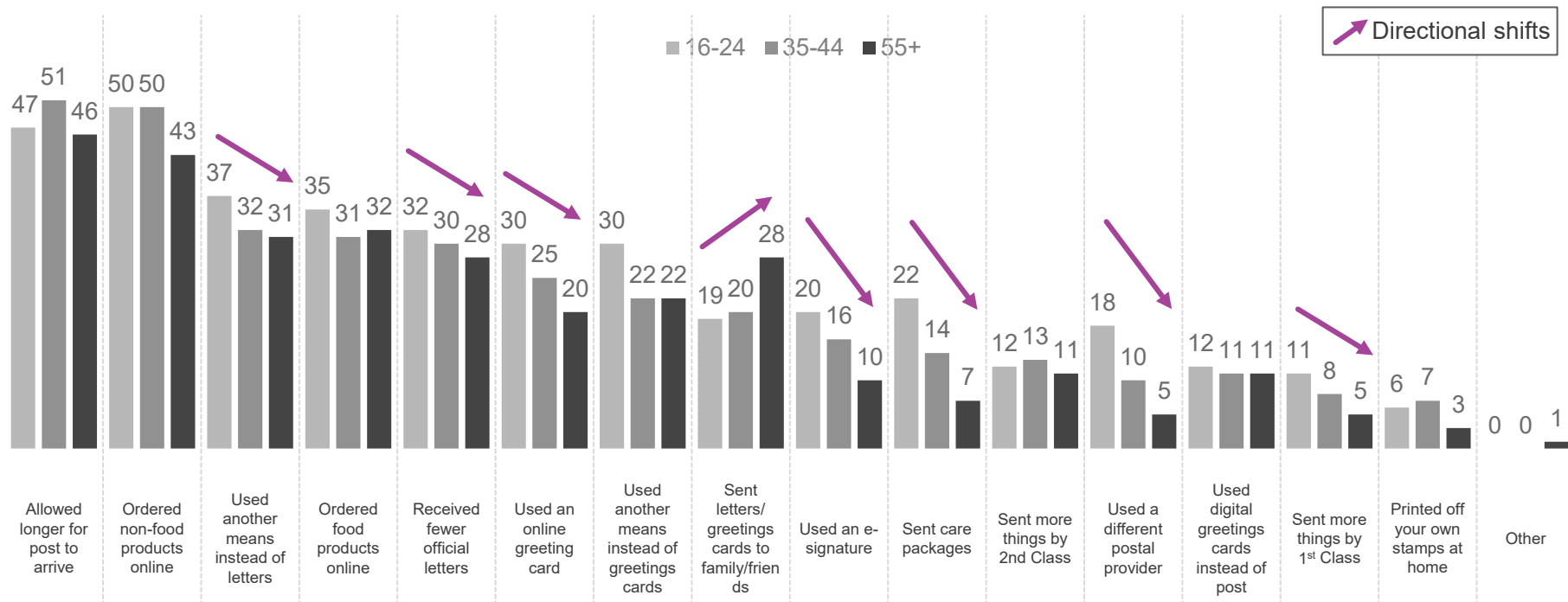
% Behaviours since the start of Covid-19



C1. Which, if any, of the following have you done since the start of the pandemic?
Base: All participants (2366)

Those aged 55+ are more likely to have sent letters/cards to family and friends, whilst those under 55 are more likely to have used e-signatures, sent care packages and used different postal provider

% Behaviours since the start of Covid-19

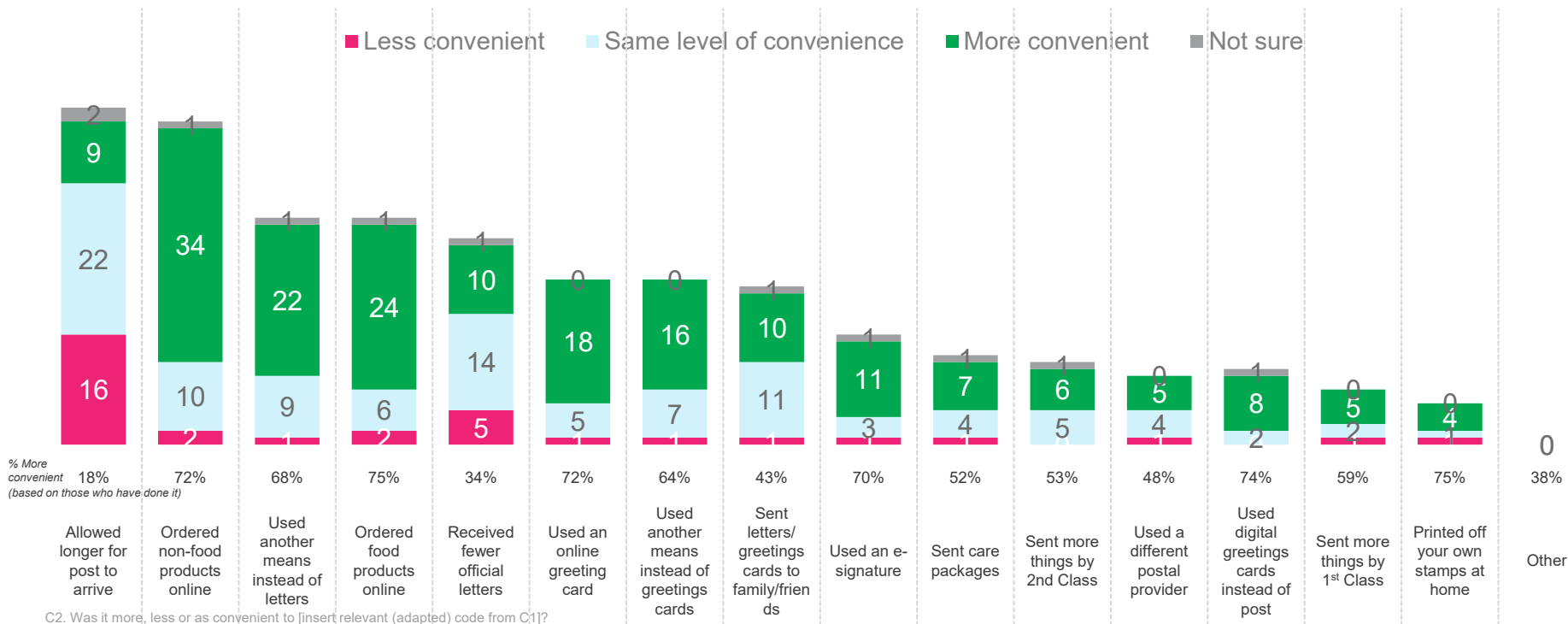


C1. Which, if any, of the following have you done since the start of the pandemic?

Base: All participants (2366)

Allowing longer for the post to arrive is the least convenient behaviour change. Ordering products online and using another means, instead of letters, are particularly convenient

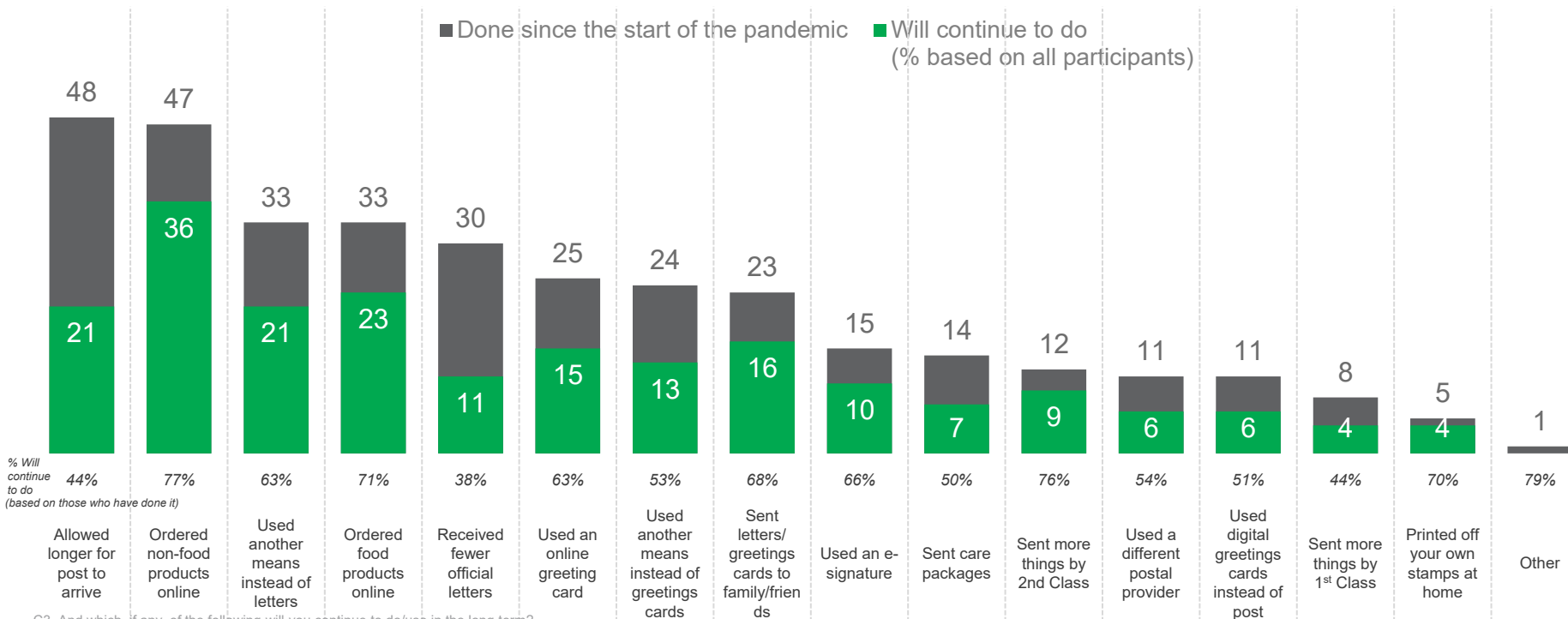
% Convenience of new behaviours (all participants)



C2. Was it more, less or as convenient to [insert relevant (adapted) code from C1]?
Base: All participants (2366)

Under half of those who have allowed longer for post to arrive will continue to do so in the future, while over three quarters of those who have ordered products online will continue to do so

% Behaviours that will be continued (all participants)



C3. And which, if any, of the following will you continue to do/use in the long term?
Base: All participants (2366)



Appendices

Slide

35	Behaviour since Covid-19: A business perspective
36	Behaviour since Covid-19: An employee perspective
37	Affect of Covid-19 on working life
38	Affect of Covid-19 on other behaviours
39	Weighted sample profile (1)
40	Weighted sample profile (2)

Behaviour since Covid-19: A business perspective from a UK adult audience

Within our nationally representative residential sample, 11% claimed to own or run a business AND a further 23% said they could answer questions about the volume of letters/parcels sent and received by the business they work for. This slide provides a summary of the findings from these participants:*

Volume of post

There has been an increase in the volume of parcels sent and received

However, the volume of letters sent and received is comparable with pre Covid-19 levels

Behaviour change

A third have allowed longer for their post to arrive

A quarter have used another means instead of sending letters or have moved to paperless invoicing

Convenience of change

Allowing longer for post to arrive is the least convenient change

Using another means of communication, moving to 'paperless' invoicing and using e-signatures are all generally noted as being more convenient

Future behaviour

Four fifths of those who have used another means instead of letters plan to continue to do so

Three quarters of those that have moved to paperless invoicing will continue to do so

**The reader should note that this business sample is not representative of the views of the UK business audience (the total survey sample has been weighted to be representative of the UK residential population, rather than the UK business audience). Therefore, caution should be used when reviewing these results.*

THANK YOU



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WOMEN OWNED

