

# 6 Post

## 6.1 Introduction

On 1 October 2011, Ofcom took over regulation of the UK's postal services from the previous regulator Postcomm. Ofcom is responsible for safeguarding the UK's Universal Service Obligation on postal services<sup>27</sup>.

This section of the report summarises the results of a face-to-face survey of UK residential consumers conducted in December 2011. In total, 3615 UK adults with responsibility for their household's post were interviewed, including 232 in Scotland.

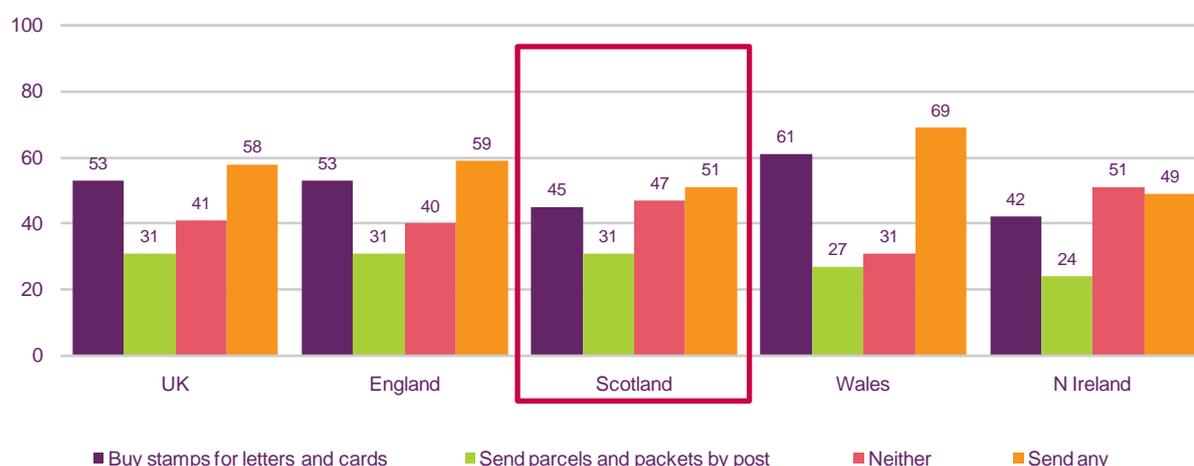
Ofcom is currently conducting further research among users of the postal service in Scotland, which will allow us to report on the experiences of business users of the postal services and users in remote locations, such as the Highlands and Islands.

## 6.2 Sending and receiving post in Scotland

### In Scotland, fewer consumers claim to send items of post regularly than the UK average

In Scotland, fewer consumers (51%) claim to send items of post regularly than the UK average (58%). As might be expected, fewer consumers in Scotland (46%) claim to regularly buy stamps for letters and cards, compared to 53% across the UK. The number of consumers claiming to regularly send parcels and packets is the same as the UK average of 31%. (Figure 6.1)

Figure 6.1 Regular use of postage stamps and postage services



Source: Ofcom Attitudes toward spending research, 2012

Base: All adults aged 16+ (n=2124 UK, 1726 England, 182 Scotland, 99 Wales, 117 Northern Ireland)

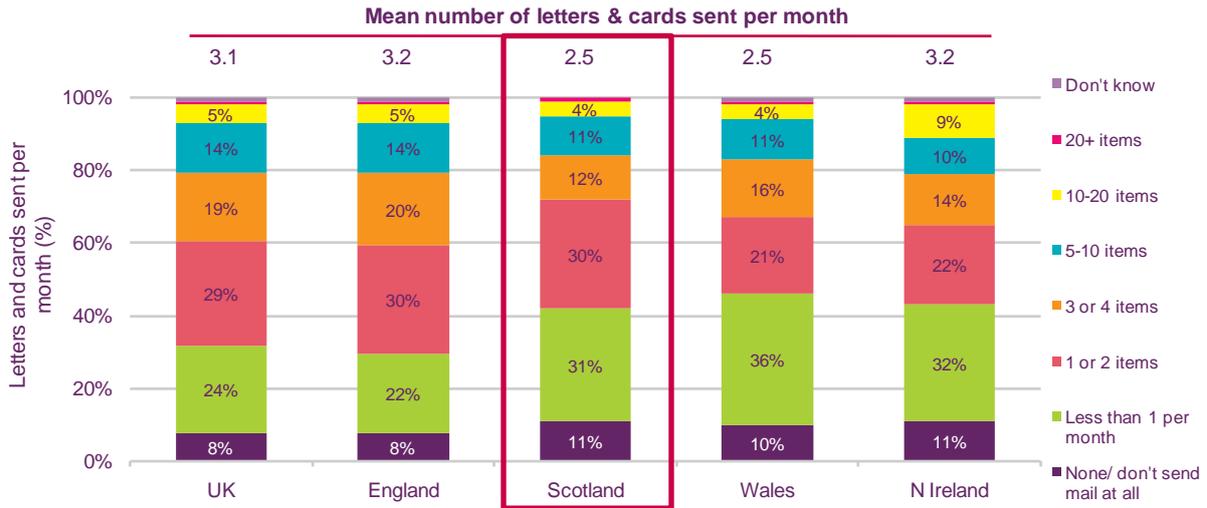
Q: Do you or anyone in your household regularly do any of the following...

<sup>27</sup> More information about Ofcom's regulation of postal services in the UK can be found here: <http://stakeholders.ofcom.org.uk/post/>

## People in Scotland receive more post than they send

Adults in Scotland claim to send an average of 2.5 letters or cards in an average month (Figure 6.2), compared to an average of approximately 8.5 letters and cards received per week (Figure 6.3). This difference is explained by the fact that the majority of UK mail is sent by businesses to households. The volume of letters and cards sent and received by households in Scotland is slightly less than the UK average of 3.1 items sent per month and 8.7 received per week.

**Figure 6.2** Approximate number of letters and cards sent per month – personal mail



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Approximately how many letters and cards do you personally send in an average month? This should exclude any items you send from home in connection with running a business, if you do this from home. We will ask about parcels separately

**Figure 6.3** Approximate number of letters and cards received per week



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland) Q. Approximately how many letters or cards do you receive in an average week? Please don't include parcels, we will ask you about these separately.

## Adults in Scotland receive an average of 1.2 parcels per month

Across the UK, in recent years, the volume of parcels delivered to households has been increasing as consumers have ordered more items online for delivery to their homes. In Scotland, adults claim to receive on average 1.2 parcels per month, although the number of packages received varies considerably, with 17% of adults receiving three or more parcels per month (Figure 6.4).

**Figure 6.4** Approximate number of parcels received per month – personal mail



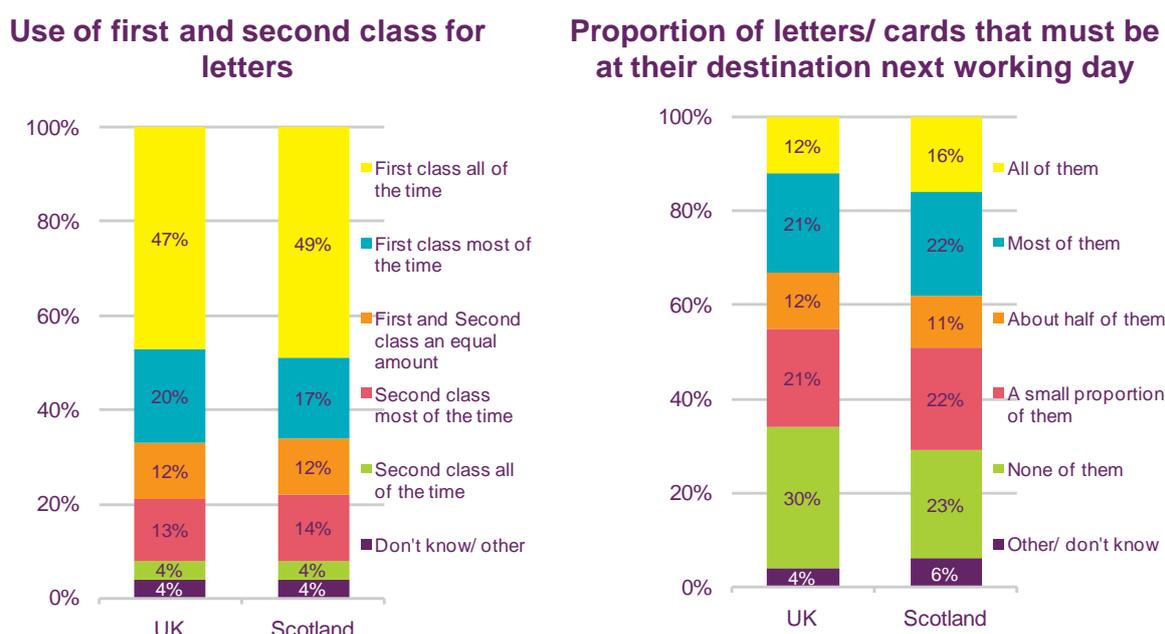
Source: Ofcom omnibus research, December 2011 Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland) Q. Approximately how many parcels do you receive in an average month?

## 6.3 Use of stamps in Scotland

### Almost half of consumers in Scotland use First Class stamps all the time

According to Ofcom research conducted in December 2011, two-thirds (66%) of post users in Scotland said that they use First Class stamps more than Second Class stamps, and almost half (49%) said that they use First Class all the time. This is despite the fact that only a minority say their mail has to arrive next day, with 16% saying that all of their mail needs to arrive next day and 22% saying that most of it does. Use of First and Second Class post and the urgency of delivery was similar in Scotland to the UK overall.

**Figure 6.5 Use of First and Second class post**



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post in (n = 3616 UK, 232 Scotland)

Q. When sending letters/ cards which do you use? And what proportion of these letters/ cards have to be at their destination the next working day?

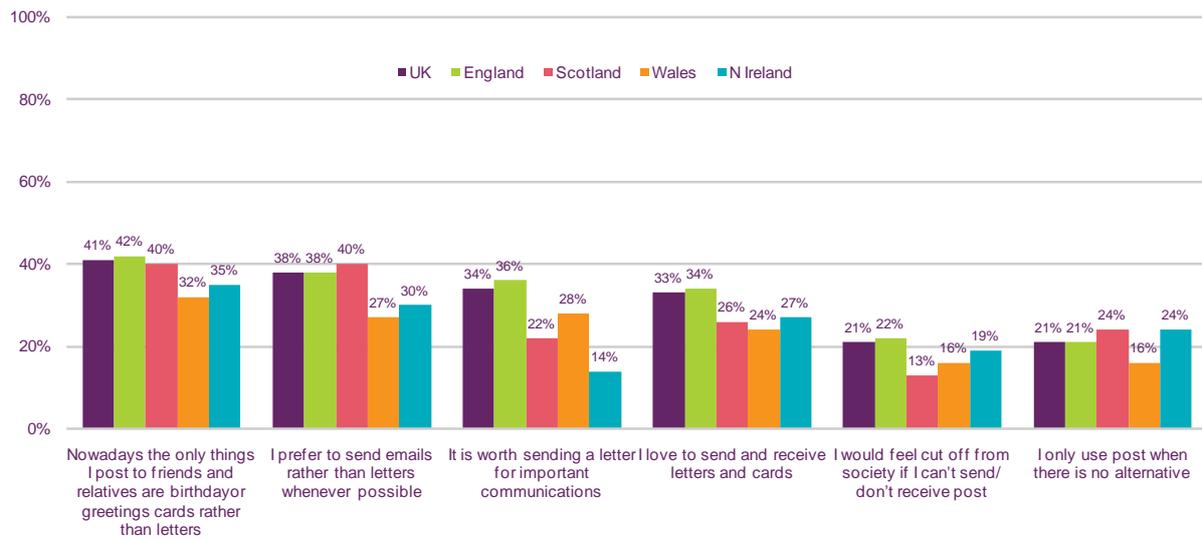
## 6.4 Attitudes towards the postal service in Scotland

### Adults in Scotland are more likely than those in other UK nations to send emails rather than letters

Four in ten adults (40%) in Scotland agree that they prefer to send emails rather than letters whenever possible, which is a slightly higher proportion than agree with this across the UK (38%) and a much higher proportion than in Wales (27%) and Northern Ireland (30%). A quarter (24%) of adults in Scotland say that they only use post when there is no alternative, which is also higher than the UK average of 21% (Figure 6.6).

Consistent with this higher level of preference towards other communications methods, adults in Scotland are less likely to agree that they love to send and receive letters and cards (26% compared to the UK average of 33%) and that they would feel cut off from society if they could not send or receive post (13% compared to UK average of 21%).

**Figure 6.6 Agreement with statements about post**



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Which of these statements applies to you?