

# 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>20</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 173 in Wales.

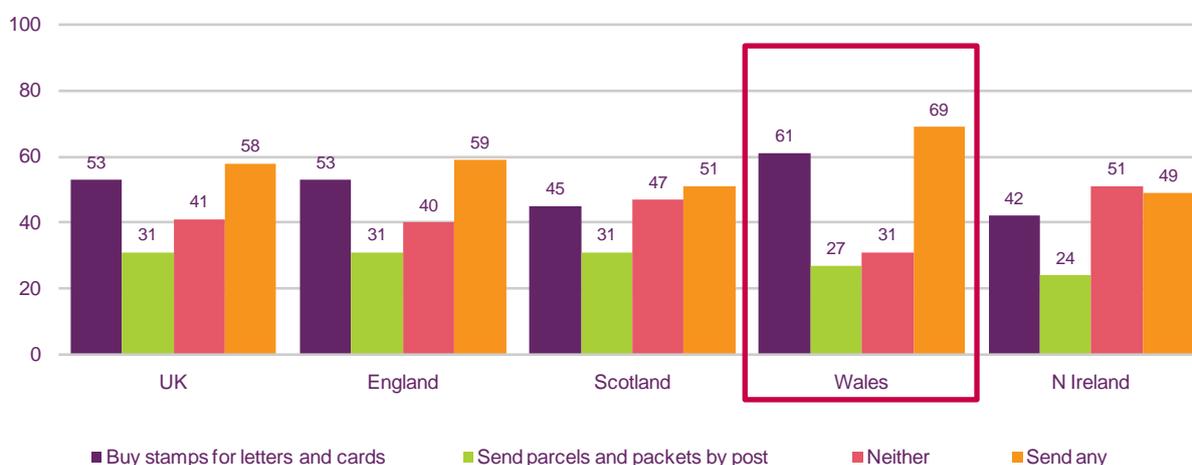
Ofcom is currently conducting further research among users of the postal service in Wales, which will allow us to report on the experiences of business users, and users in remote rural locations.

## 6.2 Sending and receiving post in Wales

### More consumers in Wales claim to send post regularly than in all other UK nations

In Wales 69% of consumers claim to send items of post regularly; significantly higher than the UK average of 58%. Sixty-one per cent of adults regularly buy stamps for letters and cards, significantly higher than the 53% UK average. Twenty-seven per cent of adults in Wales regularly send parcels and packets by post, compared to 31% in the UK. (Figure 6.1).

Figure 6.1 Regular use of postage stamps and postage services, by nation



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...

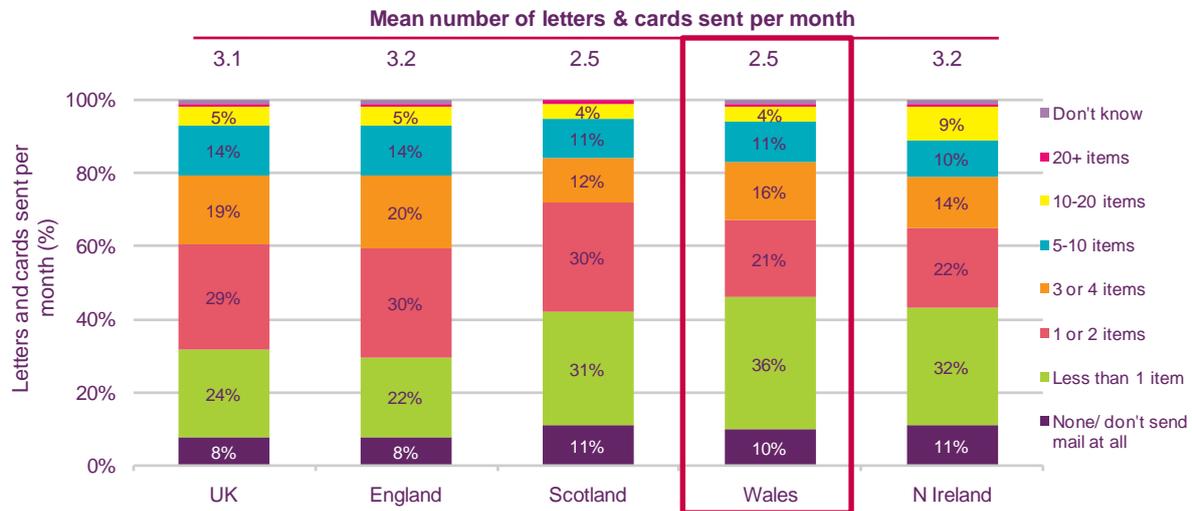
### People in Wales receive more post than they send

Adults claim to send an average of 2.5 letters or cards in an average month (Figure 6.2), compared to an average of approximately 8.2 letters and cards received per week (Figure

<sup>20</sup> More information about Ofcom's regulation of postal services in the UK can be found here: <http://stakeholders.ofcom.org.uk/post/>

6.3). This difference is explained by the fact that the majority of UK mail is sent by businesses to households.

**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.

The volume of letters and cards sent and received by households in Wales is slightly less than the UK average of 3.1 items sent per month and 8.7 received per week.

**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 Wales claim to receive fewer parcels than the UK average

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 Wales, adults claim to receive on average 0.7 parcels per month, although the number of packages received varies considerably, with a substantial minority (10%) receiving three or more parcels per month (Figure 6.4). The data suggest that adults in Wales receive fewer parcels than the UK average, with 45% saying that they do not receive a parcel each month and 26% saying they receive no parcels in an average month – however, this apparent difference is within the survey’s error margins so should not necessarily be considered a real difference.

**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)

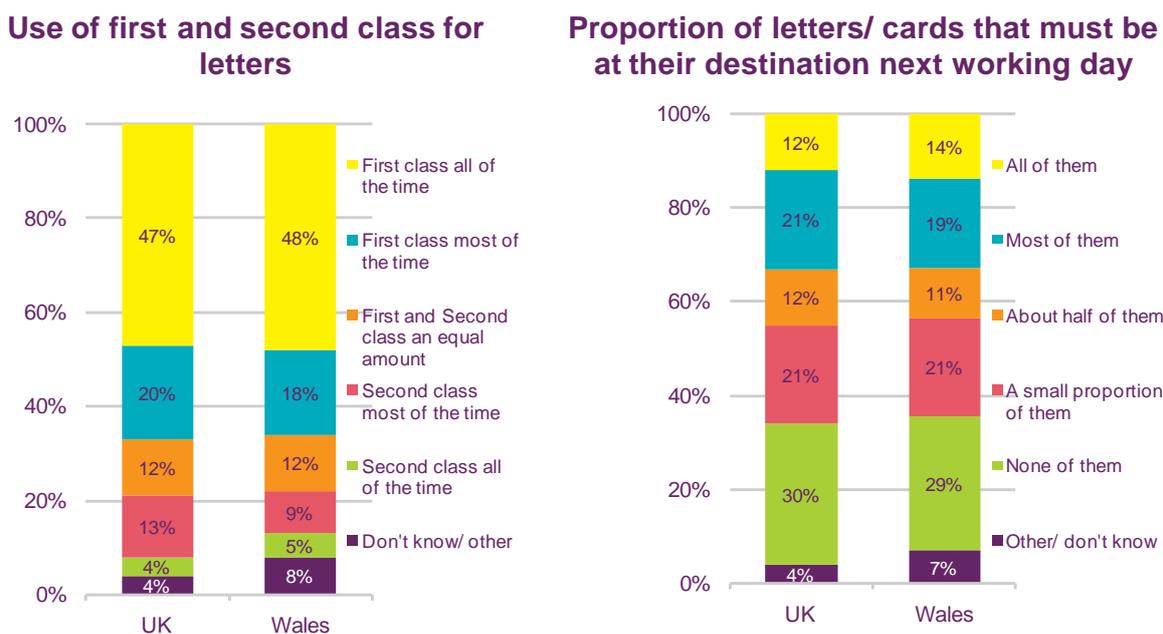
Q. Approximately how many parcels do you receive in an average month?

## 6.3 Use of stamps in Wales

### Almost half of consumers in Wales say they use First Class all the time

Ofcom’s research conducted in December 2011 showed that two-thirds (66%) of post users in Wales said that they use First Class stamps more than Second Class stamps and almost half (48%) 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 14% saying that all of their mail needs to arrive next day, and 19% saying that most of it does. Use of First and Second Class post and the urgency of delivery was similar in Wales 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 (n = 1615 UK, 173 Wales)

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?

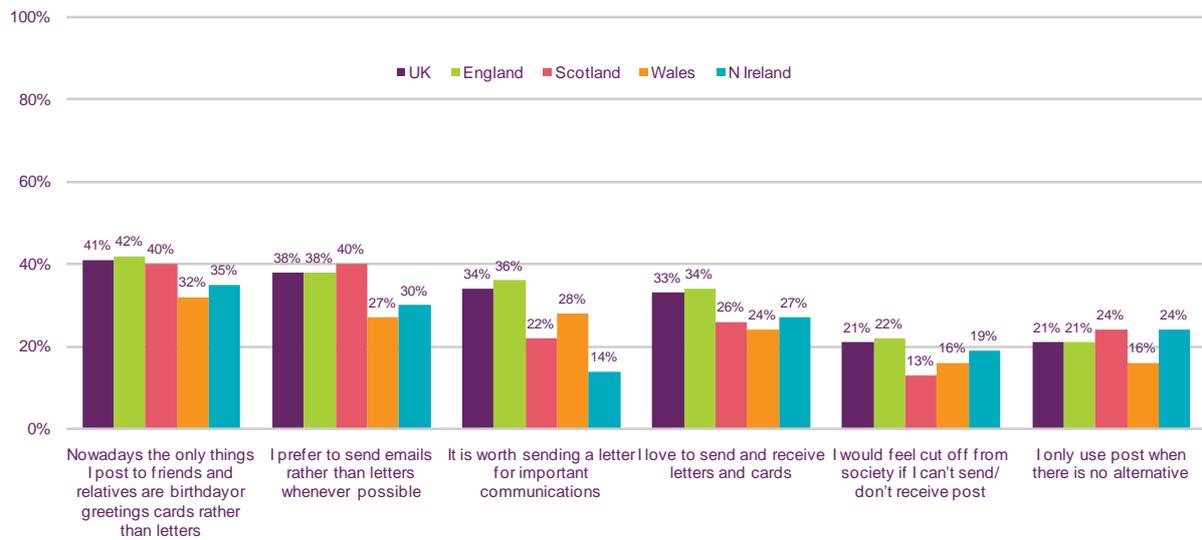
## 6.4 Attitudes towards the postal service in Wales

### Compared to the UK average, fewer adults in Wales prefer to send emails rather than letters

A quarter (27%) of adults in Wales agree that they prefer to send emails rather than letters whenever possible, which is a lower proportion than agree with this across the UK (38%). Sixteen per cent of adults in Wales say that they use post only when there is no alternative, compared to the UK average of 21% (Figure 6.6) – this is the lowest level of agreement with this statement across the UK, perhaps suggesting that people in Wales have a greater preference for use of the postal service than in other UK nations. Adults in Wales are also less likely to agree that they send only greetings cards rather than letters to friends and relatives.

Adults in Wales are less likely to agree that they love to send and receive letters and cards (24% compared to the UK average of 33%) and that they would feel cut off from society if they could not send or receive post (16% 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?