



The International Communications Market 2016

7 Post

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7.1 Post: overview and key market developments

A note on the data presented in this chapter

Due to the availability of publicly-accessible data, the relevant financial year's figures are generally used in this chapter when referring to 2015. In the few cases where data are not available, market estimates based on long-term trends and local insight have been used. The UK figures are based on those published in our [Annual Monitoring Report](#).

7.1.1 Overview

Demand for parcels continued to increase in all of our comparator countries

Almost nine in ten people in the UK claimed to have received an item of post in the past week, with 5.9 items on average received, of which 1.8 were parcels. Demand for parcels continued to increase in all of our comparator countries in 2015, except for Japan where it remained broadly stable. Research shows that half of adults in the UK claimed to have received a parcel in the past week, and this was higher (at two-thirds) for weekly online shoppers.

People in the UK are among the most reliant on post as a way of communicating

More than half of people in the UK consider themselves to be reliant on post as a way of communicating.

In per-capita terms, the UK had the fifth highest letter mail volume among the comparator countries. Nevertheless, people in the UK are among the most reliant on post as a way of communicating, with more than half considering themselves to be either 'very' or 'fairly' reliant.

People in the UK are among the most likely to have sent an invitation/greetings card

Seven in ten adults in the UK have sent an item of post in the past month, on average sending around 3.9 items per month. In particular, people in the UK are among the most likely to have sent an invitation/greetings card in this time period; just under a third of those who had sent an item in the past month said they had sent this type of mail.



1ST
The UK is among the cheapest countries in Europe in which to send a medium-sized 1st class letter

The UK is among the most expensive countries in which to send a First Class small letter

However, as sending a First Class medium-sized letter in the UK costs the same as sending a small one (64p), this is less expensive than in most other European countries. Similarly, the UK is among the cheapest countries in Europe in which to send a large letter.

Consumers in most countries engage in high levels of online shopping from overseas retailers

Around six in ten people in the UK say they have made a purchase from an overseas retailer in the past year. One of the main problems encountered when making purchases from abroad is the long delivery time; four in ten people in the UK cite this as a problem. Conversely, among those who do not make purchases from overseas retailers, the main reason is that the items they want are available in their home country, therefore there is no need to purchase them overseas.

The UK ranks second among our comparator countries for selling something online

More than half the respondents in the UK claimed to have sold something online, the second highest proportion after Germany. However, 28% of those who had sold something online had never sold anything overseas. For those who had sold online to overseas customers, the higher than expected cost of sending items abroad was the single biggest problem encountered in all comparator countries.

Figure 7.1 Key metrics: 2015

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN
Letter mail volume (billion items)	12	13	16	4	149	18	4	3	3	2	2	1	4	8	3	6	27
Letter mail volume per capita	190	199	195	60	462	142	168	74	184	236	44	112	80	39	20	4	19
Letter mail revenue (£bn)	4.3	6.0	6.3	2.2	31.3	10.4	1.0	0.9	1.8	0.9	0.6	0.1	1.6	1.6	0.4	0.4	1.9
Letter mail revenue per capita (£)	67	94	78	37	97	82	43	20	105	91	15	22	32	8	3	0	1
Parcel volume per capita	31	-	37	5	36	71	-	7	18	10	6	-	36	-	-	-	15
Standard (C5) domestic stamp price (pence)	64	116	105	203	103	76	123	69	159	109	43	29	-	47	58	25	63
Average number of items of post sent per month	3.9	4.9	3.8	3.9	6.3	2.3	3.4	2.6	-	4.4	-	-	-	-	-	-	-
Average number of items received in the last week	5.9	8.0	5.0	4.2	9.8	4.8	4.2	3.2	-	5.2	-	-	-	-	-	-	-
Online shopping from overseas retailers (%)	61	59	53	74	50	34	75	69	-	55	-	-	-	-	-	-	-

Sources: WIK / Ofcom analysis / Ofcom consumer research October 2016

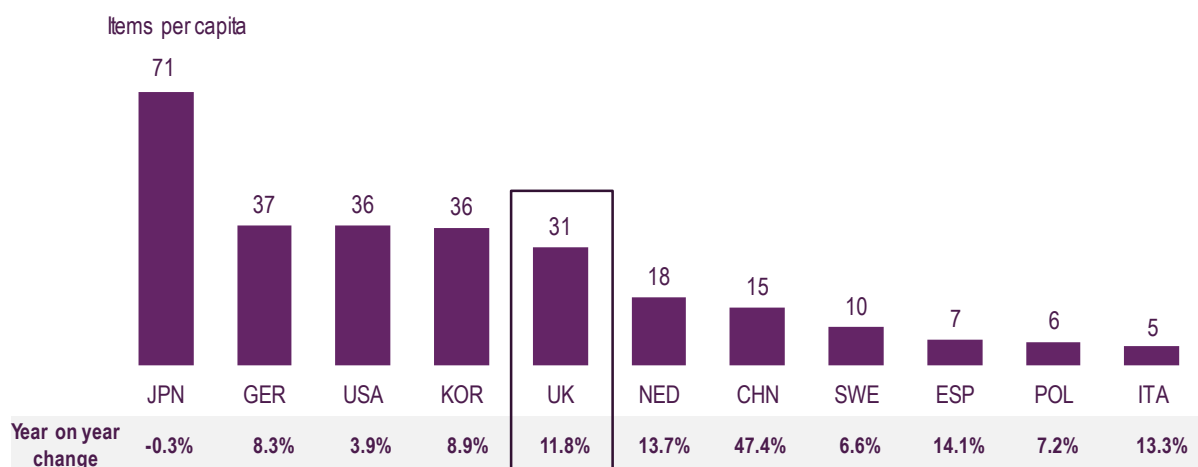
Note: For the purposes of this table the majority of figures have been rounded to the nearest whole number.

7.1.2 Parcel volumes continue to grow

The UK had the fifth highest per-capita parcel volume among the comparator countries in 2015

Japan had the highest parcel¹⁵² volume per head of population, more than double that in the UK (71 and 31 respectively). The high per-capita parcel volumes in Japan are likely to be due to the large number of parcels sent between businesses. The UK ranked fifth among the comparator countries, higher than most other European countries for which we have comparable data (only Germany had a higher number of parcels per person). This likely reflects the UK's position as a leading e-commerce nation. Per-capita parcel volumes increased in all countries except Japan, where it remained broadly stable (down 0.3%) in 2015.

Figure 7.2 Parcel volume per head of population: 2015



Source: WIK / Ofcom analysis

Six in ten online shoppers in the UK say they have received a parcel in the past week

Parcel volume growth, particularly where items are sent from businesses to consumers, has been driven by the continued increase in online shopping.¹⁵³ In all of our comparator countries, regular online shoppers (i.e. those who shopped online at least once a week) were more likely to have received a parcel, compared to those who were less active at online shopping. In the UK, 63% of weekly online shoppers claimed to have received a parcel in the past week, similar to most of the other countries. Only in Germany and Spain was this proportion higher, at 72%.

¹⁵² For the UK, 'parcel' is defined as an addressed postal item which can, according to normal operating assumptions, be lifted by a single average person without mechanical aids (weighing no more than 31.5kg) and which is not a Letter or a Large Letter; and includes both domestic and international parcels. More information on the parcels sector in the UK can be found in our [Annual Monitoring Report](#).

Although it has not been possible to obtain robust and comparable data on mail volumes by type for all our comparator countries, information on the size and growth of the parcel market has been included for all the countries for which this information is available. Parcel definition may vary between countries.

¹⁵³ More information about online shopping can be found in Section 6.1.4.

Figure 7.3 Regular online shoppers who had received a parcel in the past week, compared to non-regular online shoppers: 2016

Proportion of respondents (%)



Source: Ofcom consumer research, October 2016

Base: All weekly online shoppers who have received any items of post in the last week/non-weekly online shoppers who have received any items of post in the last week, UK=530/331, FRA=269/604, GER=436/442, ITA=352/403, USA=441/347, JPN=257/522, AUS=360/432, ESP=279/444, SWE=264/539

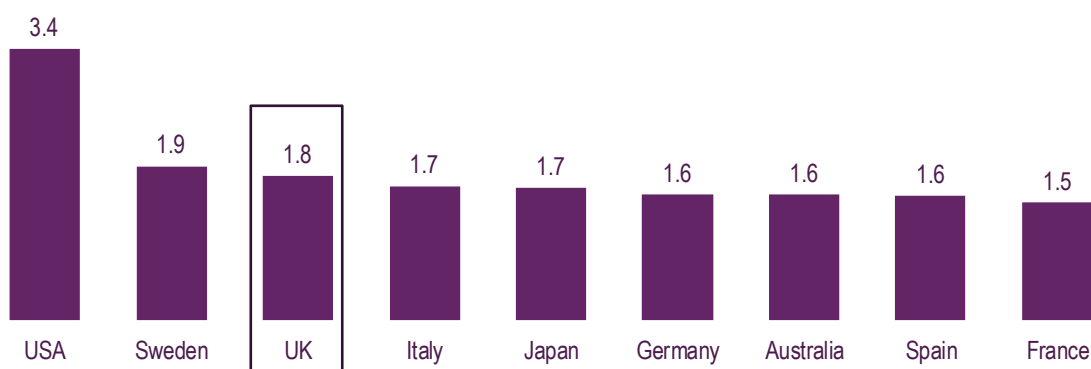
Q.17 Which of these types of items would you say you have personally received through the post in the last week? - NET: Any parcels

People in the UK reported receiving a similar number of parcels in the past week as those in most other comparator countries

Among people who had received a parcel in the past week, those in the US reported receiving 3.4 parcels on average, more than in all other comparator countries. The average number of parcels received in the UK was 1.8, broadly similar to all other countries. Although Japan had much higher parcel volumes per head, as shown in Figure 7.2, respondents to our consumer research in Japan reported receiving a similar number of parcels as those in most other comparator countries.¹⁵⁴

Figure 7.4 Average number of parcels received in the past week: 2016

Average number of parcels per respondent



¹⁵⁴ This is in part due to the high number of parcels that are sent between businesses in Japan. Additionally, our consumer research asked respondents to recall how many parcels they had received in the past week, while parcel volume per head is calculated from the total parcel volumes for the year. The two are therefore not fully comparable.

Source: Ofcom consumer research, October 2016

Base: All respondents who have received any items of post in the last week, UK=861, FRA=873, GER=878, ITA=755, USA=788, JPN=779, AUS=792, ESP=723, SWE=803

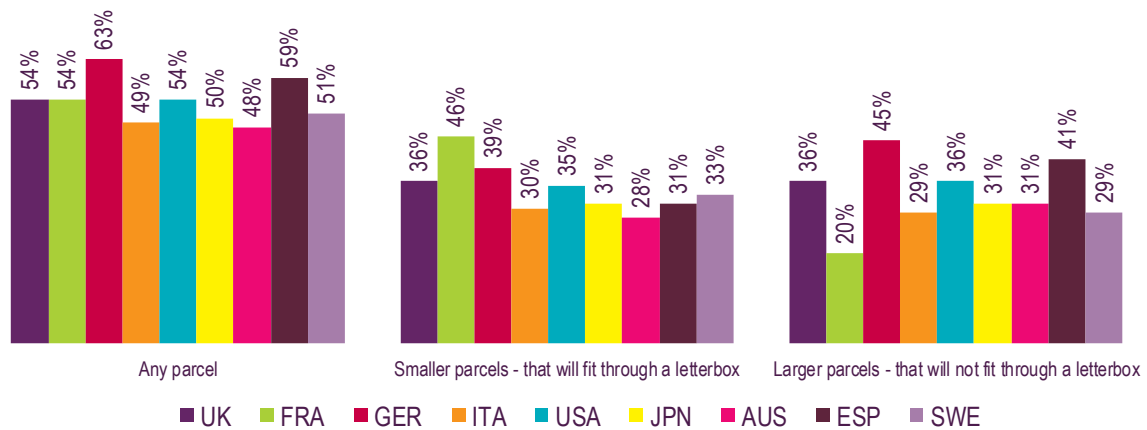
Q.16 Approximately how many of these items you received in the last week were parcels i.e. items that wouldn't easily fit through a standard household letterbox?

People in the UK are as likely to receive a small parcel as a large one

In most of our comparator countries, more than 50% of respondents who had received an item of post in the past week had received a parcel. In the UK, similar proportions claimed to have received small and large parcels (36%). Those in France, however, were more likely to have received a small parcel in the past week, with almost half (46%) having done so, while only a fifth reported having received a large parcel, lower than in all other countries.

Figure 7.5 Types of parcel received in the past week: 2016

Proportion (%) of respondents who have received any post in the last week



Source: Ofcom consumer research, October 2016

Base: All respondents who have received any items of post in the last week,

UK=861, FRA=873, GER=878, ITA=755, USA=788, JPN=779, AUS=792, ESP=723, SWE=803

Q.17 Which of these types of items would you say you have personally received through the post in the last week?

7.1.3 Consumers in most countries shop online from overseas retailers

About six in ten people in the UK claim to have made online purchases from overseas retailers in the past year

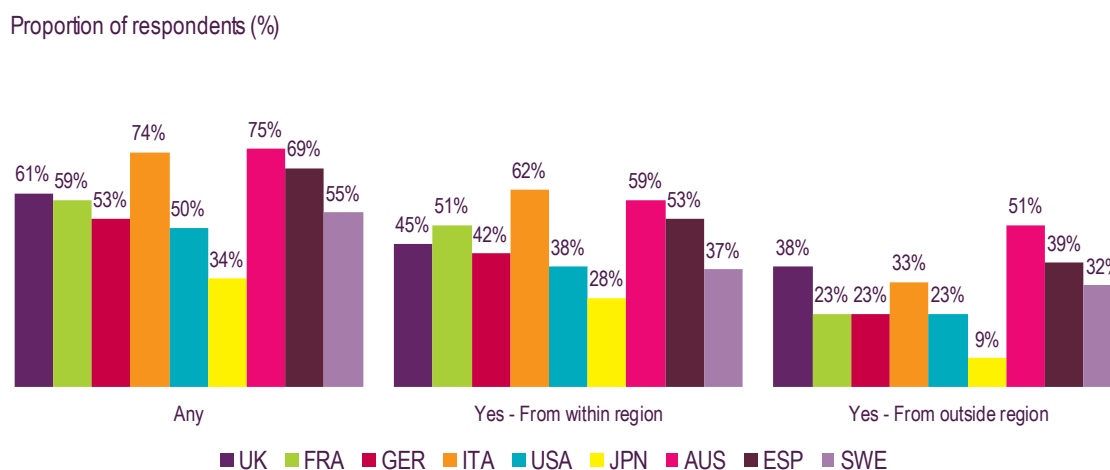
Except for Japan, at least half of people in all comparator countries said they had shopped online from overseas retailers.¹⁵⁵ Respondents in all the countries said they had mostly made purchases from within their own geographical region,¹⁵⁶ although purchasing from outside the region was also substantial.

¹⁵⁵ As this is online research, this figure may be higher than for the population as a whole.

¹⁵⁶ The question was asked differently depending on the country being researched. Respondents in Europe (UK, Spain, Germany, Italy, France and Sweden) were asked if they had knowingly purchased anything online from retailers within the EU and from outside the EU in the past year. Respondents in the US were asked if they had knowingly purchased online from retailers in North America/ outside North America in the past year, respondents in Japan were asked if they had knowingly purchased anything from retailers within Asia/ outside Asia in the past year, and respondents in Australia were asked if they had knowingly purchased online from retailers within Australasia/ outside Australasia in the past year.

In the UK, 61% claimed to have shopped from overseas retailers, with 45% saying they had made online purchases from within the EU, while 38% had bought from retailers outside the region in the past year.

Figure 7.6 Online shopping from overseas retailers in the past year: 2016



Source: Ofcom consumer research, October 2016

Base: All respondents, UK=1000, FRA=1008, GER=1010, ITA=1032, USA=1016, JPN=1011, AUS=1007, ESP=1016, SWE=1000

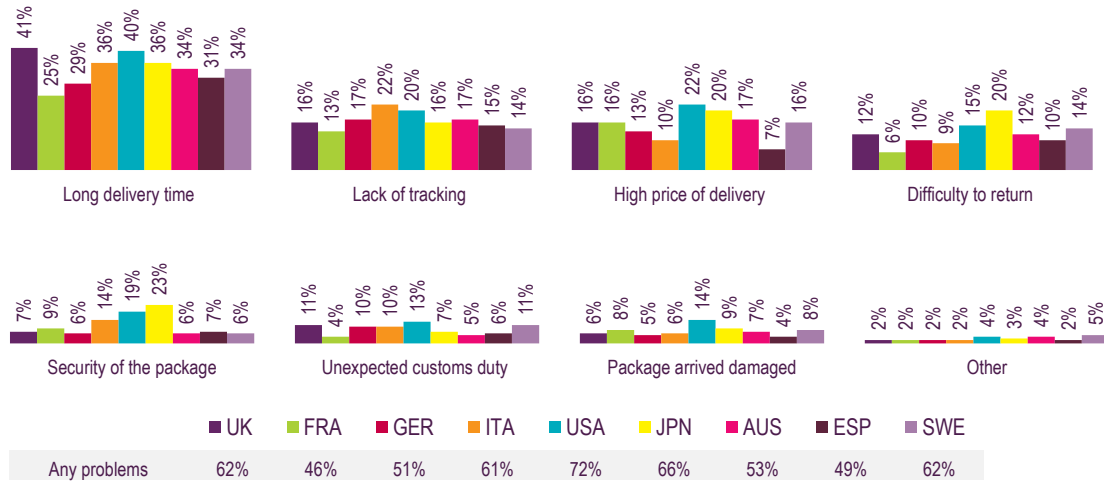
Q.19 Have you knowingly purchased online from overseas in the last year?

The biggest problem encountered when making overseas purchases is long delivery times

In the UK, 62% of respondents, who had knowingly purchased items online from overseas retailers in the past year, said they had experienced problems with the postal process. Four in ten people in the UK (and in the US) claimed to have had problems with long delivery times, significantly higher than in most of the other countries. Other main problems reported by UK respondents include lack of tracking ability and the high price of delivery.

Figure 7.7 Problems experienced when making purchases overseas: 2016

Proportion of respondents who have knowingly purchased items online from overseas retailers in the last year (%)



Source: Ofcom consumer research, October 2016

Base: All respondents who had knowingly purchased items online from overseas retailers in the last year

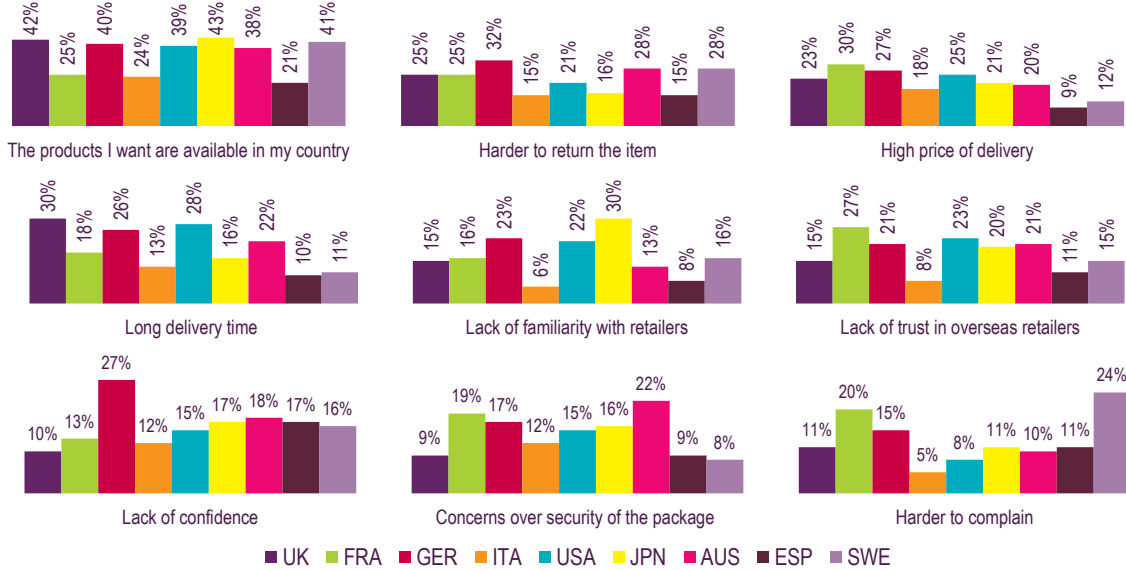
UK=618, FRA=600, GER=540, ITA=772, USA=518, JPN=353, AUS=762, ESP=722, SWE=528
 Q.20 Did you experience any problems/difficulties with the postal process when buying from overseas?

Four in ten people in the UK feel that the items they want are available in their country

The reason most commonly cited by respondents for not shopping overseas was that they felt that the items they wanted were available in their home country (and therefore there was no need to buy them from overseas). Other main reasons cited for not shopping overseas include long delivery times, more complicated return policies and the cost of delivery.

Figure 7.8 Main reasons for not making purchases from overseas retailers: 2016

Proportion of respondents who have not knowingly purchased items online from overseas retailers in the last year (%)



Source: Ofcom consumer research, October 2016

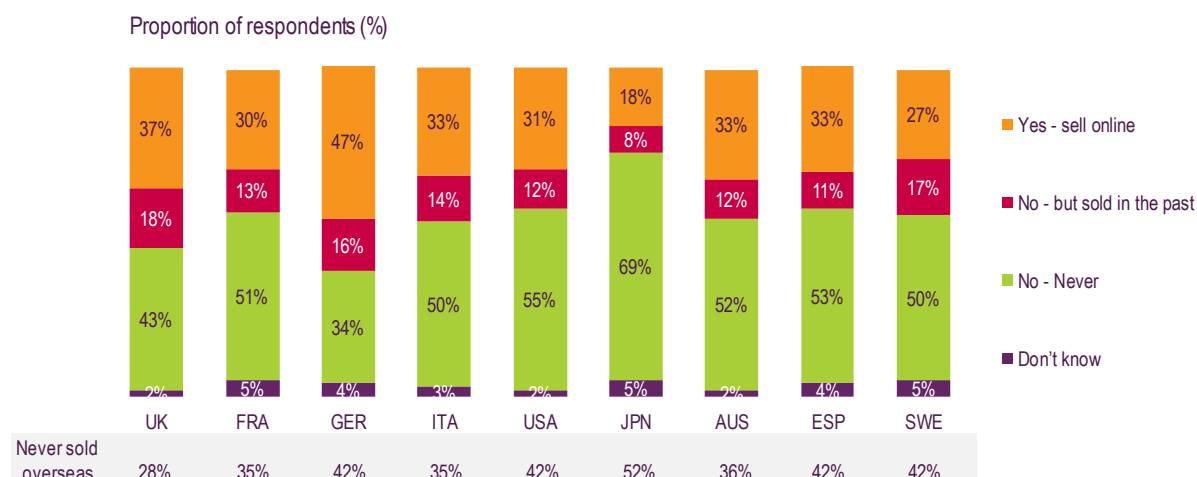
Base: All who had not knowingly purchased items online from overseas retailers in the last year
 UK=316, FRA=349, GER=423, ITA=189, USA=301, JPN=596, AUS=220, ESP=251, SWE=398
 Q.21 Why have you not bought items from overseas retailers in the last year?

More than half of respondents in the UK claimed to have sold something online

Over half (55%) of respondents in the UK claimed to have sold at least one item online using websites such as eBay and Gumtree. This was significantly higher than in most other comparator countries. Of these, 37% said that they still sell online, while 18% used to sell in the past but are no longer doing so.

Across all countries, a large portion of those who had sold online said they had never sold anything overseas. Twenty-eight per cent of respondents in the UK claimed to have never done this, significantly lower than in all other comparator countries.

Figure 7.9 Online selling activity: 2016



Source: Ofcom consumer research, October 2016

Base: All respondents/ All respondents who have ever sold online UK=1000/554, FRA=1008/441, GER=1010/631, ITA=1032/493, USA=1016/447, JPN=1011/267, AUS=1007/470, ESP=1016/455, SWE=1000/ 424

Q.22 Excluding any activity you may do as part of your main job, do you ever sell anything online? / Q.23 Have you experienced any problems or difficulties with the postal process when sending products overseas?

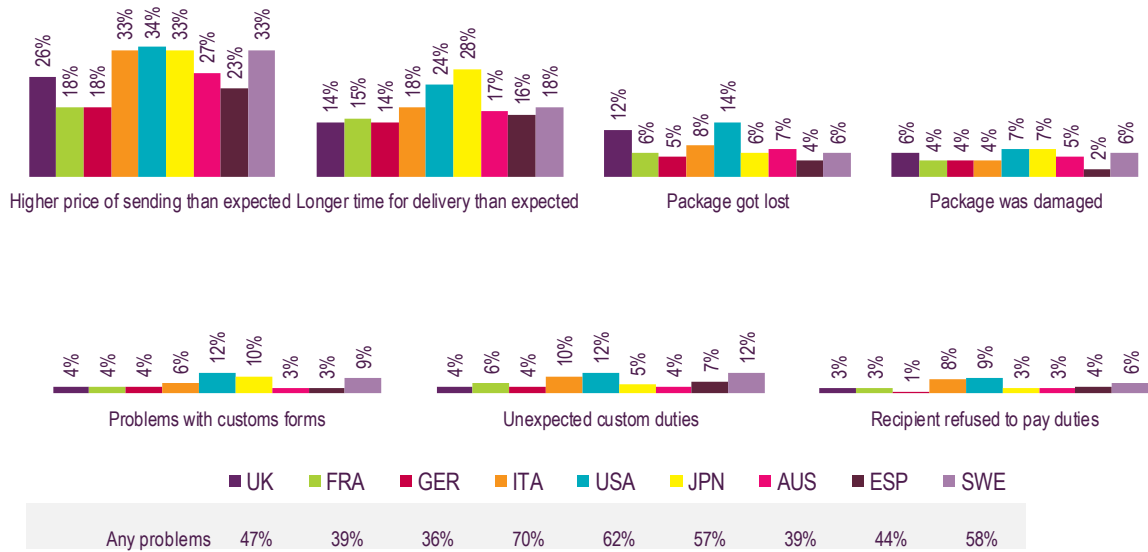
The biggest problem encountered when sending items overseas is higher-than-expected cost

Of those who had sold something overseas, almost half the respondents in the UK (47%) claimed to have encountered problems. Those in Italy (70%) and the US (62%) were more likely than those in all other countries to have had problems with postal services when sending products overseas.

The biggest problem reported by people in most countries was the higher-than-expected postage cost; cited by 26% of respondents in the UK, followed by a longer-than-expected delivery time, and packages getting lost.

Figure 7.10 Problems experienced with post when sending items overseas: 2016

Proportion of respondents who have ever sold overseas (%)



Source: Ofcom consumer research, October 2016

Base: All respondents who have ever sold online (excluding those who have never sent items overseas)

UK=394, FRA=289, GER=369, ITA=317, USA=262, JPN=129, AUS=298, ESP=262, SWE=243

Q.23 Have you experienced any problems with the postal process when sending products overseas?

7.2 The postal industry

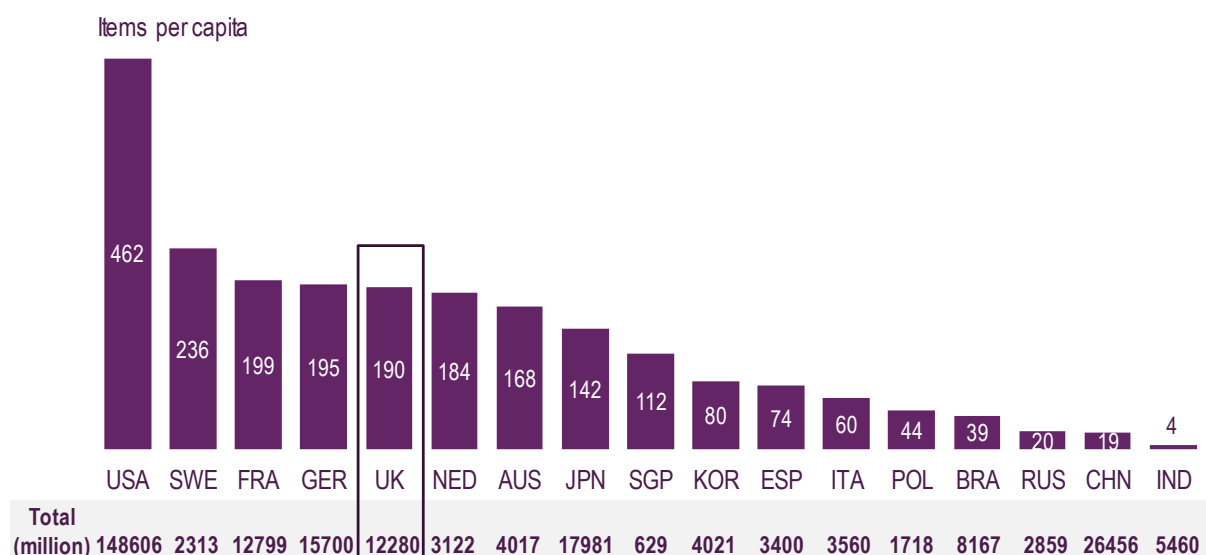
7.2.1 Letter mail volume and revenue

In most cases the volume and revenue metrics in this section refer to addressed letters, however, differences between countries mean that in some cases the categories of mail that are included are not an exact match.¹⁵⁷

The UK had the fifth highest per-capita mail volume, of all the comparator countries

Volume per head of population in 2015 was highest in the US; almost double that in Sweden, which had the second highest per-capita letter mail volume. In the UK, 190 letters were received per person in 2015, the fifth highest among the comparator countries. The US also had the highest mail volume in absolute terms, at 149 billion items, 12 times higher than the UK.

Figure 7.11 Letter mail volume per head of population: 2015



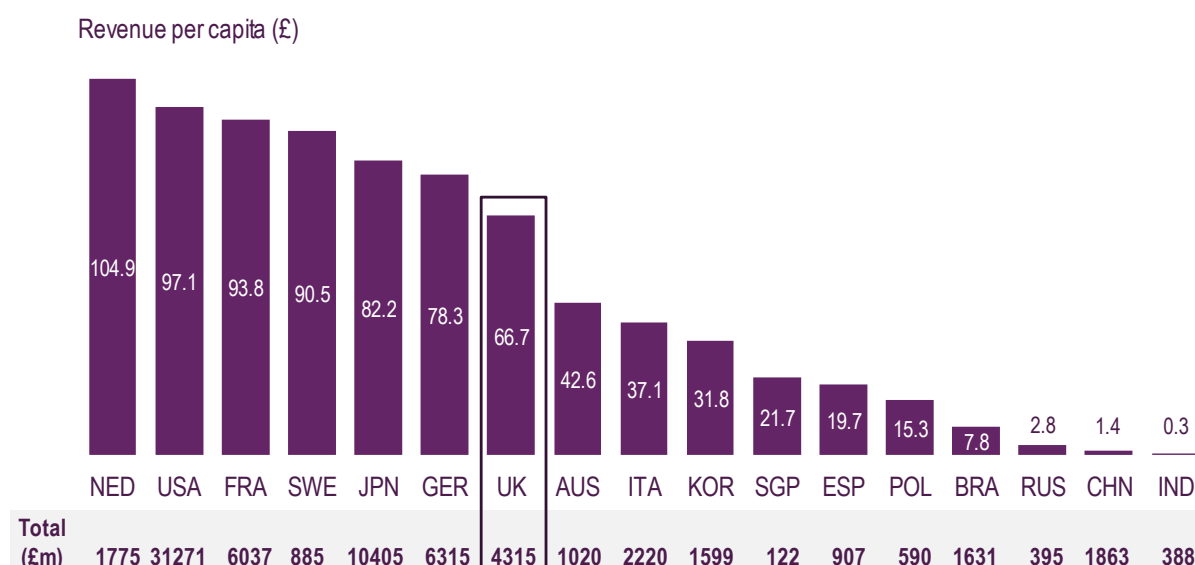
Source: WIK / Ofcom analysis

The UK had the seventh highest per-capita mail revenue

While the mail sector in the US is the largest among our comparators in absolute terms for both volume and revenue, the Netherlands had the greatest revenue per head of population in 2015. In the UK, revenue per person was £66.70, the seventh highest among the comparator countries. As with volume, per-capita revenue was lowest in the BRIC countries.

¹⁵⁷ The way that post is defined and volumes and revenues are recorded differs from country to country. In all of our comparators, addressed letter mail delivered within the country is included. In Australia, Brazil and Japan, the volume and revenue figures also include unaddressed advertising mail as this could not be excluded from the reported figures. In South Korea, postal parcels could not be excluded from the reported volume and revenue figures.

Figure 7.12 Letter mail revenue per head of population: 2015



Source: WIK / Ofcom analysis

7.2.2 Single-piece stamp prices

This section looks at domestic stamp prices across the countries analysed in this report. In each case, we have considered the fastest letter mail product, which most commonly has a next-day (D+1) delivery target; although as Figure 7.13 shows, there is some variance between countries.¹⁵⁸

Figure 7.13 Delivery specifications for the fastest letter mail product

UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	BRA	RUS	IND	CHN
D+1	D+1	D+1	D+1	D+3	Variable	Variable	D+3	D+1	D+1	D+1	D+1	D+2-5	Variable	Variable	Variable

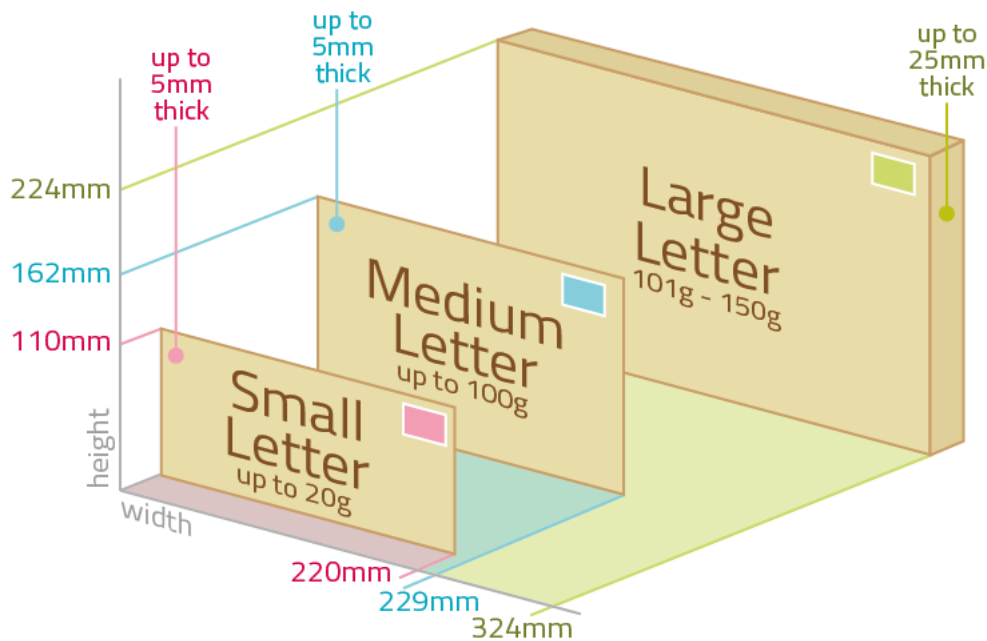
Source: WIK

Note: Delivery targets in Japan, Australia, Brazil, Russia, India and China are dependent on the point of origin and destination.

We have looked at the prices for three mailings with different characteristics, based on typical envelope sizes as shown in Figure 7.14 below.

¹⁵⁸ The products that we have looked at are all single-piece, domestic tariffs, available to all consumers. In line with other currency conversions in this report, prices have been converted into British Sterling using the International Monetary Fund average exchange rates for 2015. The prices of the products are compared as they were published on the operators' websites on 31 October 2016, and have not been adjusted for purchasing power parity. Where we look at previous years' prices, these are the prices on 31 December of each year.

Figure 7.14 Mailing characteristics



Note: small letter is based on a DL envelope, medium letter: a C5 envelope¹⁵⁹ and large letter: a C4 envelope.

We have also looked at the prices of Second Class products in comparator countries where they are available.

The UK is one of the most expensive countries in which to send a small letter

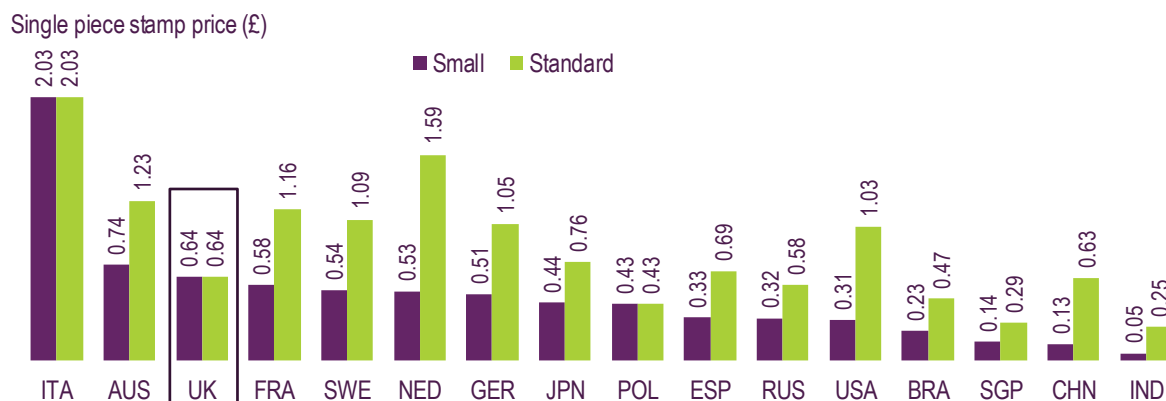
At 64p, the UK is one of the most expensive countries in which to send a First Class small letter, after Italy and Australia. However, sending a medium-sized letter in the UK costs the same as sending a small one, thus making it less expensive than most other developed markets. Italy is the most expensive country for both small and medium sized letters; after a long period of stable letter tariffs, Poste Italiane increased its consumer tariffs substantially in 2015 (to four times the 2014 tariff for the D+1 letter).¹⁶⁰

The reason the UK is more expensive for a small letter and cheaper for a medium-sized letter is due to the different tariff structures used in each country. Most postal operators in Europe have a lower price for small letters and postcards weighing 20g or less, and a higher price for items weighing more than 20g, or exceeding the dimensions of a DL envelope. In the UK, Royal Mail does not offer a separate price for letters meeting the dimensions of a small letter set out above, so the price is the same whether a small or a medium-sized letter is being sent.

¹⁵⁹ Most greetings cards in the UK are no larger than a C5 envelope

¹⁶⁰ This followed a decision by the Italian regulatory authority AGCOM to amend the universal service regulations for Poste Italiane, allowing it to introduce a new 'ordinary' letter service for consumers and business (equivalent to the Second Class service in the UK).

Figure 7.15 Published stamp prices for First Class small (DL) and medium (C5) domestic letters: October 2016



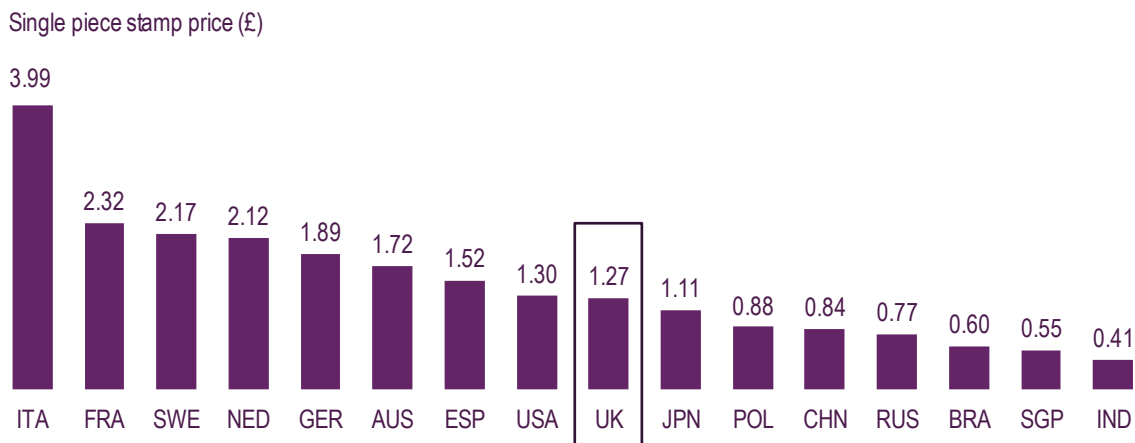
Source: WIK / Ofcom analysis

Note: South Korea is not included as the additional charge for the 'Priority Mail' product is not published.

The UK is among the cheapest countries in Europe in which to send a large letter

In the UK, the price of a First Class large letter is £1.27, making it the least expensive country among our European comparator countries after Poland, where it costs less than £1. In three of the eight European comparators (France, Sweden and the Netherlands), sending a large letter costs more than £2, while in Italy it costs almost £4 following the introduction of Second Class equivalent services in 2015.

Figure 7.16 Published stamp prices for First Class large (C4) domestic letters: October 2016



Source: WIK / Ofcom analysis

Note: South Korea is not included as the additional charge for the 'Priority Mail' product is not published. For Australia, the definition of a large letter differs from other countries (thickness 20mm) as, based on our definition (up to 25mm thickness), the price for a large letter would represent the 'small parcel' price offered by Australia Post.

It is cheaper to send a medium or large Second Class letter in the UK than in most other European countries

Not all of our comparator countries offer a lower-priced single piece product with a slower delivery standard, in the same way that First and Second Class are available in the UK. This choice is available to consumers in France, Italy, Sweden, Poland, Australia, South Korea and Russia. These are usually D+3 products, with the exception of France and Italy (where it

can take up to four days), as well as Australia and Russia (where delivery times vary depending on the point of origin and destination).

Figure 7.17 Delivery specifications for the Second Class equivalent letter product

UK	FRA	ITA	SWE	POL	AUS	KOR	RUS
D+3	D+3-4	D+4	D+3	D+3	Variable	D+3	Variable

Source: WIK

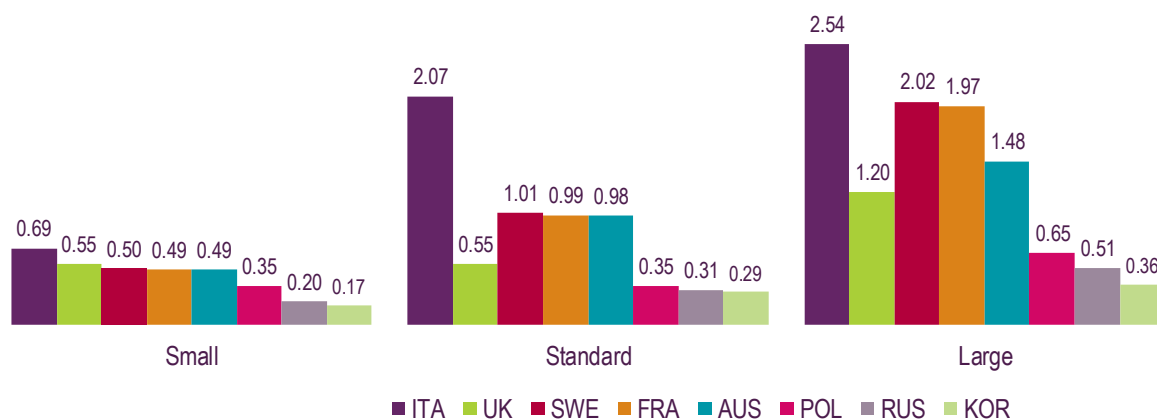
Note: Delivery targets in Russia and Australia are dependent on the point of origin and destination.

South Korea is the cheapest country in which to send a Second Class equivalent letter, regardless of the format. Similarly, Italy is the most expensive country; here, Second Class equivalent services were introduced in 2015 and cost a third more than the former D+1 letter.

Sending Second Class medium-sized and small letters costs the same in the UK (55p). The price of sending a small letter in the UK is slightly higher than in Sweden and France, but less expensive than in Italy. However, it is far cheaper to send a medium or large Second Class letter in the UK than in most other European countries.

Figure 7.18 Published stamp prices for Second Class small (DL), medium (C5) and large (C4) domestic letters: October 2016

Single piece stamp price (£)



Source: WIK / Ofcom analysis

Note: For Australia, the definition of a large letter differs from other countries (thickness 20mm) as based on our definition (up to 25mm thickness), the price for a large letter would represent the 'small parcel' price offered by Australia Post.

7.2.3 Direct mail

Twenty per cent of total letter mail volume in the UK is advertising mail

The proportion of direct advertising mail¹⁶¹ in total letter volumes was highest in the US, where half of all letters in 2015 were direct mail. In the UK, direct mail accounted for 20% of all letters, around the same level as in France and Italy.

¹⁶¹ Advertising materials (such as brochures, catalogues, etc.) delivered via post.

Figure 7.19 Proportion of direct mail in total letter volume: 2015



Source: WIK / Ofcom analysis

7.2.4 Competition in letters

This section looks at the share of volume in the end-to-end letters sector that is accounted for by postal operators other than the provider of the universal postal service (where such competition exists).

In the UK, operators other than Royal Mail account for less than 1% of end-to-end letter volumes

There are two main forms of competition in the letters sector: access and end-to-end. Access competition is where the operator collects mail from the customer, sorts it and transports it to the universal service provider for delivery. This enables other operators to offer letter postal services to larger business customers without setting up their own delivery networks. Access competition is well established in the UK and is the predominant form of competition, with access mail accounting for almost 58% of total letter volumes in 2015. Access competition also exists in Germany, where it is known as ‘consolidation’ or ‘partial services’.

End-to-end competition is where an operator other than the universal service provider undertakes the entire process of collecting, sorting and delivering mail to the intended recipients. The UK was the only country among our comparators where competitors to the universal service provider had less than 1% share of end-to-end letter volumes. This is because Royal Mail is the only postal operator delivering end-to-end letters on any significant scale since Whistl stopped its end-to-end delivery of letters in 2015 (after its investment partner LDC pulled out of the joint venture).

Figure 7.20 End-to-end delivered letter shares accounted for by operators other than the universal postal service provider: 2015



Source: WIK / Ofcom analysis

Note: 2015 shares for Spain are approximate

7.3 The postal consumer

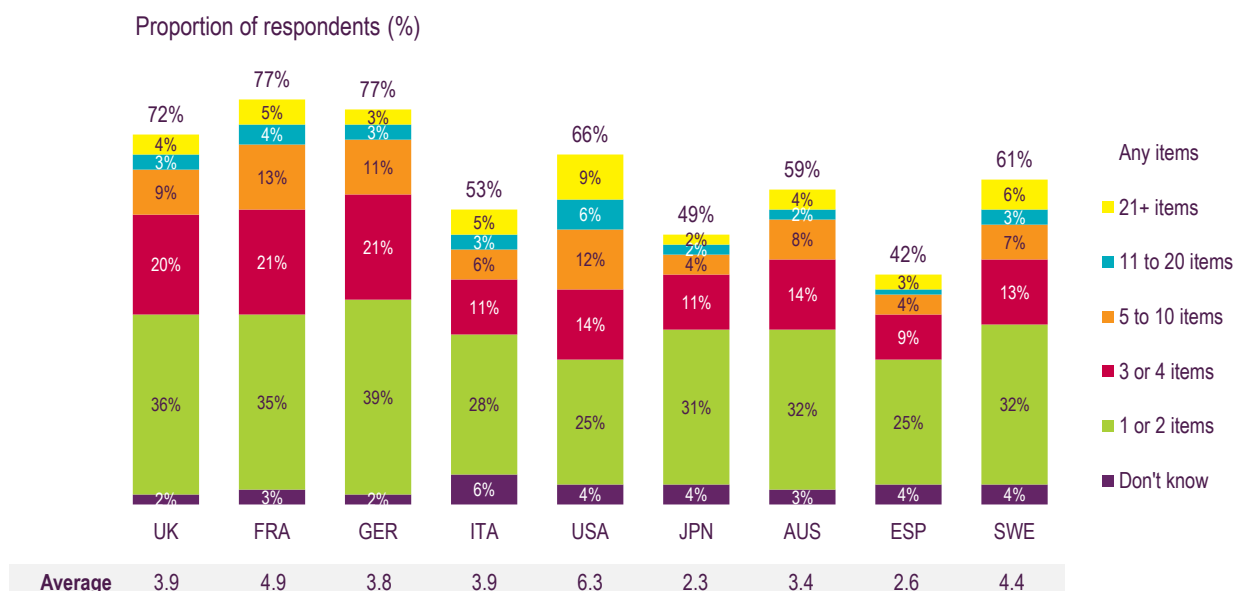
7.3.1 Volume and types of items sent

Seven in ten people surveyed in the UK have sent an item of post in the past month

Respondents in the UK were among the most likely to have sent an item of post in the past month, with seven in ten people claiming to have done so. Only in France and Germany were people more likely to have sent something by post over the same period.

Among respondents who said that they had sent something, they were most likely to have sent one or two items only in the past month, across all of our comparator countries. The average number of mail items sent in the UK was 3.9 per person, with 16% claiming to have sent five or more items.

Figure 7.21 Approximate number of items of post sent per month: 2016



Source: Ofcom consumer research, October 2016

Base: All respondents, UK=1000, FRA=1008, GER=1010, ITA=1032, USA=1016, JPN=1011, AUS=1007, ESP=1016, SWE=1000

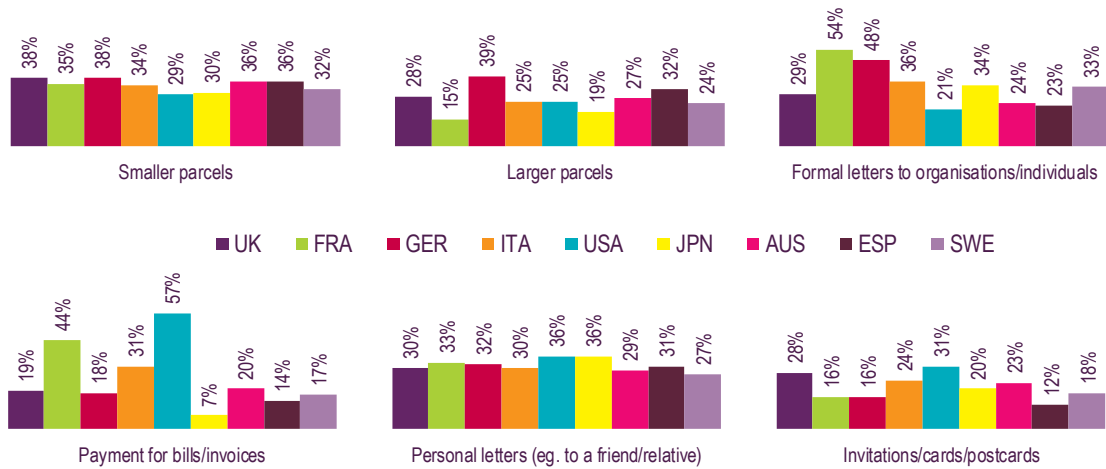
Q.13 Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

People in the UK are among the most likely to send invitation cards/ postcards

People in the UK were among the most likely to have sent personal mail (including letters and invitations/greetings cards/postcards), with half of the respondents claiming to have done so. Just under three in ten respondents in the UK said they had sent invitation/greetings cards in the past month. This was significantly higher than all other countries, except for the US (31%) and Italy (24%). More than half of the respondents in the UK also claimed to have sent a parcel (either large or small), similar to most other countries. More information about parcels can be found in section 7.1.2.

Figure 7.22 Type of items sent in the past month: 2016

Proportion of respondents who sent any items of post in the past month (%)



Source: Ofcom consumer research, October 2016

Base: All respondents who had sent any items of post in the last month,

UK=715, FRA=771, GER=775, ITA=547, USA=680, JPN=479, AUS=582, ESP=442, SWE=606

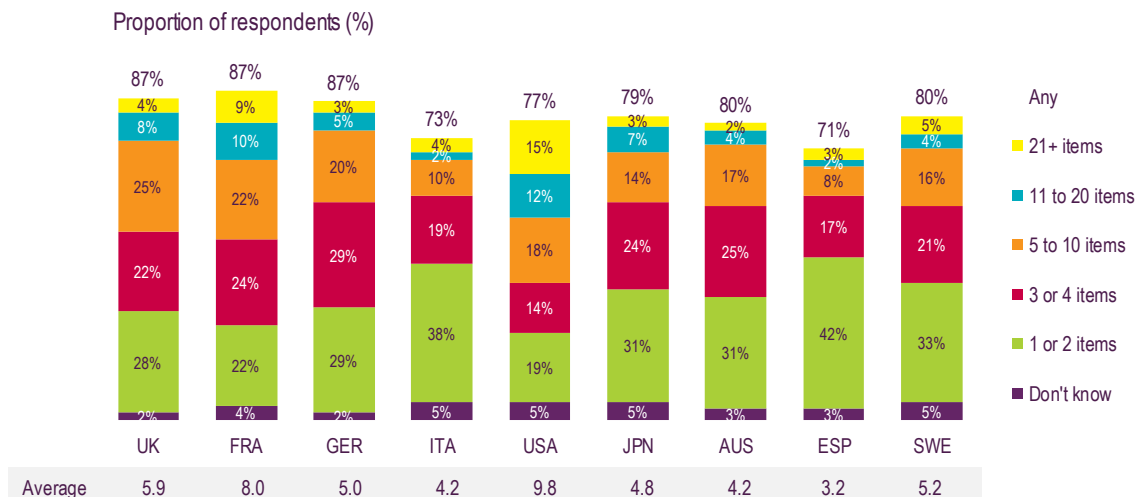
Q.14 Which of these types of mail would you say you have personally sent in the last month by post?

7.3.2 Volume and types of post received

Almost nine in ten people in the UK have received an item of post in the past week

People in the UK were among the most likely to have received an item of post in the past week, with 87% of respondents saying they had received at least one item. On average people in the UK received 5.9 items a week, higher than in most other countries.

Figure 7.23 Approximate number of items of post received in the past week: 2016



Source: Ofcom consumer research, October 2016

Base: All respondents, UK=1000, FRA=1008, GER=1010, ITA=1032, USA=1016, JPN=1011, AUS=1007, ESP=1016, SWE=1000

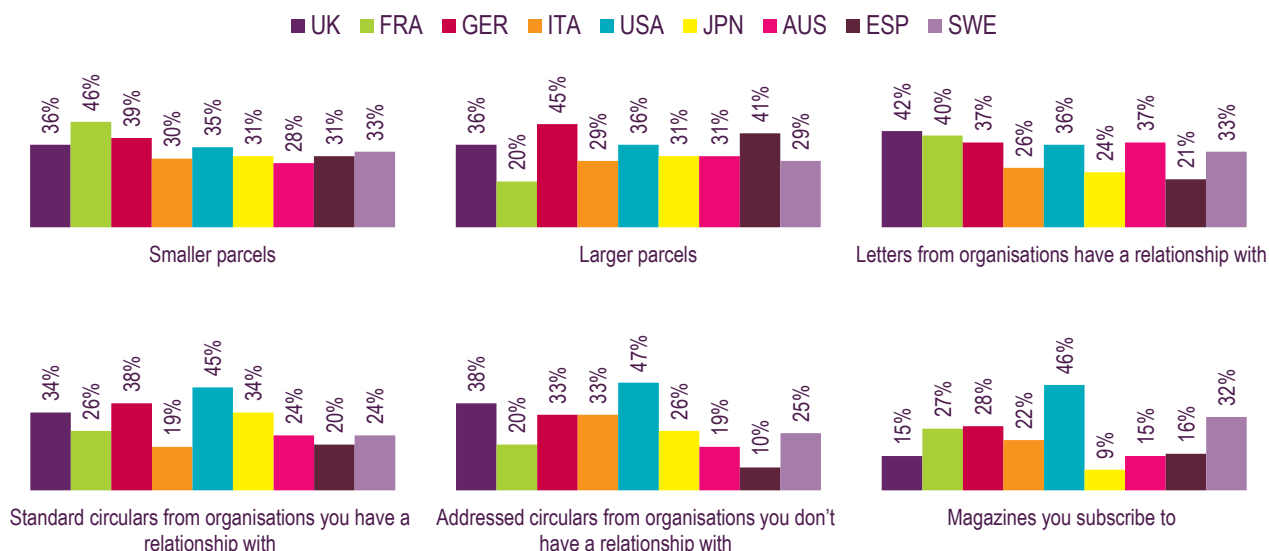
Q.15 Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week?

People in most countries are more likely to receive bills than any other type of mail

Significantly more respondents in the UK than in other countries claimed to have received circulars in the past week.¹⁶² However, fewer respondents said they subscribed to receive magazines by post compared to other European countries; only in Spain was this proportion broadly similar.

Figure 7.24 Types of mail received in the past week (1): 2016

Respondents who have received items of post in the past week (%)



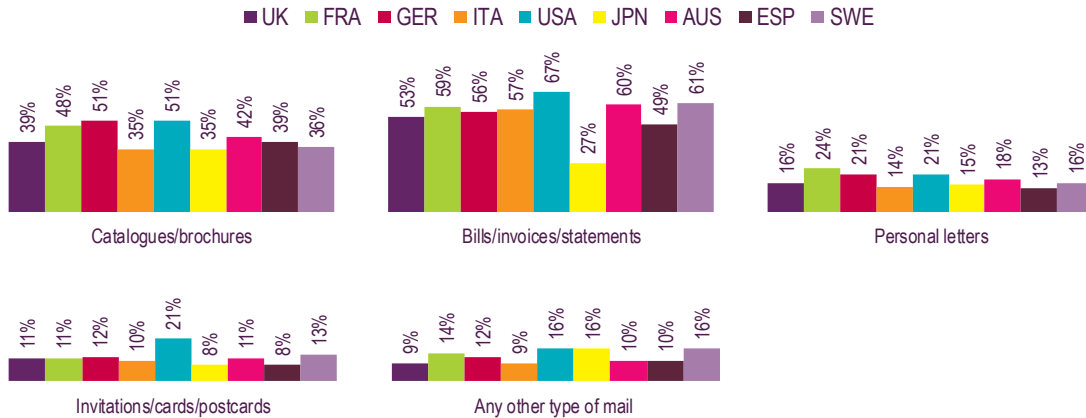
Source: Ofcom consumer research, September - October 2015 Base: All respondents who had received any item of post in the past week, UK=861, FRA=873, GER=878, ITA=755, USA=788, JPN=779, AUS=792, ESP=723, SWE=803 Q. 17 Which of these types of items would you say you have personally received through the post in the last week?

Although people in the UK were among the most likely to send invitation cards/ postcards (Figure 7.21), this type of mail was received by just 11% of those who said that they had received any mail in the past week, a similar proportion as in most other countries. Respondents in the UK were more likely to receive bills/ statements/ invoices than any other type of mail; this was also true in most other countries.

¹⁶² These are 'letters from organisations you have a relationship with/ standard circulars from organisations you have a relationship with/ addressed circulars from organisations you don't have a relationship with'.

Figure 7.25 Types of mail received in the past week (2): 2016

Respondents who have received items of post in the past week (%)



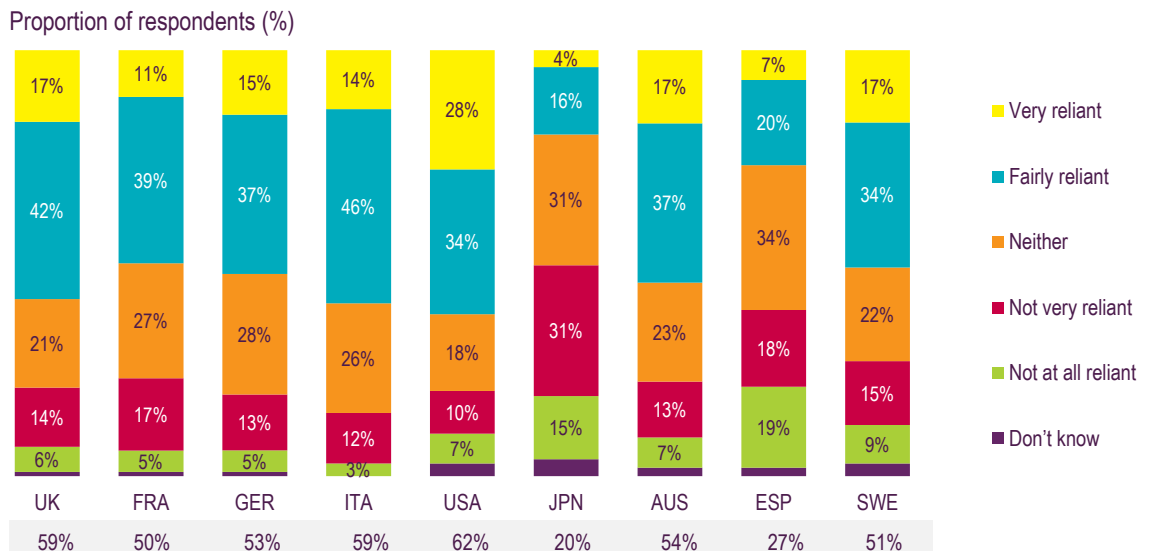
Source: Ofcom consumer research September - October 2015 Base: All respondents who had received any item of post in the past week, UK=861, FRA=873, GER=878, ITA=755, USA=788, JPN=779, AUS=792, ESP=723, SWE=803 Q.17 Which of these types of items would you say you have personally received through the post in the last week?

7.3.3 Reliance on post as a way of communicating

About six in ten people in the UK consider themselves reliant on post as a way of communicating

People in the US, UK and Italy are the most likely to consider themselves reliant on post as a way of communicating. Conversely, Spain and Japan are the only two countries where less than half of the people said they rely on post.

Figure 7.26 Reliance on post as a way of communicating: 2016



Source: Ofcom consumer research, October 2016 Base: All respondents, UK=1000, FRA=1008, GER=1010, ITA=1032, USA=1016, JPN=1011, AUS=1007, ESP=1016, SWE=1000 Q.18 How reliant would you say you are on post as a way of communicating?