C2X Parcels Consumer Research 2021

Produced by: BVA BDRC and Jigsaw Research

Fieldwork: July/ August 2021

1. Research Method and Objectives

C2X Parcels Consumer Research: Background and Introduction

- Ofcom regulates the postal services sector, which is made up of letters and parcels services.
- Ofcom has undertaken research into consumers' experience in the parcels segment to help inform its work on the 2022 Review of postal regulation.

The parcels market is made up of two main segments:

1. Consumer to Anywhere (C2X) segment. Purchasing postage for sending parcels on a single piece basis, i.e. excluding those using bulk contracts. C2X senders are typically residential consumers who:

    - Send parcels to friends and family (social senders)
    - Send a parcel returning an item they have bought online*
    - Send a parcel to someone who has purchased an item from them, often using marketplace selling

They may also include small businesses that don't send enough parcels to benefit from a bulk contract.

2. Business to Consumer (B2C) segment. This is the segment for bulk contracts for parcels and is often, but not always, online retailers who use parcel services to deliver products to consumers.

The research in this document relates to the C2X segment and the experience of senders. There is a separate report regarding the experience of those receiving parcels in the B2C segment.

We conducted both qualitative research and quantitative research amongst C2X senders. Findings from both elements of the research are in this report.

*Where the postage charge is covered by the online retailer we generally consider as B2C

Specific policy questions around C2X parcel sending addressed by programme of qualitative and quantitative research

Policy questions

Research programme

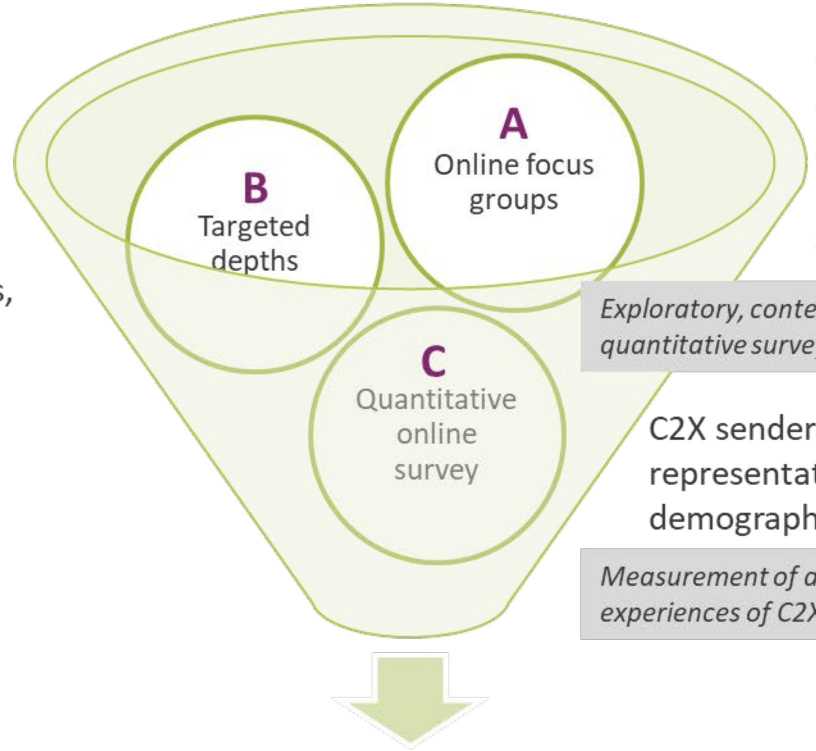
1.How significant are alternatives to Royal Mail and what is driving the preference for Royal Mail/other operators in the C2X segment?

2.Should tracking be included in the USO for 1st/ 2nd class parcels?

3. What is the extent of consumer issues experienced by C2X users, when using Royal Mail and other operators?

4.How are complaints handled by Royal Mail and other operators, and are additional consumer protection measures needed?

C2X senders with no/ limited online access, living in rural/ remote areas, older



C2X senders in different nations and split by predominant sending type

Exploratory, context and to inform quantitative survey design

C2X senders representative by demographic profile

Measurement of attitudes, usage and experiences of C2X market as senders

Overall summary of primary research findings

This report brings together the overall findings from the qualitative and quantitative research. NB: Slides based on qualitative research are not in the Ofcom template

Qualitative research design

Research comprised 8 Online Groups and 21 Depth interviews. Participants were spread over the UK with different habits in regards to C2X sending and a range of demographic characteristics including digital exclusion

Audience	Fieldwork
Social Senders	2x Online Groups
Online Marketplace ‘Hobby’ Sellers	2x Online Groups
Online Marketplace micro businesses/ SME Sellers	2x Online Groups
Non-Marketplace SME Sellers	1x Online Group
Vulnerable Groups	15x In-depth Interviews • 5x with physical impairment • 5x with other impairments • 5x living in deep rural areas • 1x online triad with deep rural sellers
Digitally Excluded (Symbol denoting without internet)	By location (3x living in deep rural location) By age (3x aged 75+)
Geo-spread	England, Scotland, Wales and Northern Ireland

Sub-quotas:

Sample included

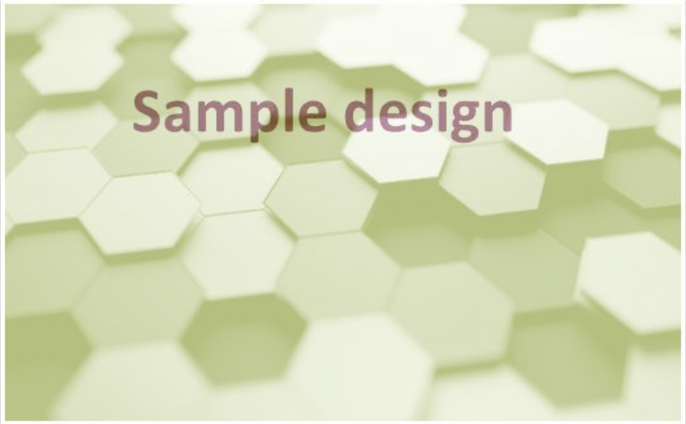
- A range of sender behaviour (heavy to light volume)
- Mix of SEG and demographics
- Mix of parcel providers used
- Mix of newer vs. more experienced sellers
- Complainants

Assumptions/Logistics:

- Groups lasted 105 mins, depths 50 mins
- Groups conducted via Zoom as were some depth interviews (although most were conducted by phone – 12 in total)
- Respondents incentivised for attending and for a short pre-task

Quantitative research method summary

Sample sourced from online panels and targeted respondents. Face to face research was not an available option, and telephone research also has response biases.



Sample designed to be representative of parcels senders using the demographic profile from the Ofcom residential postal tracker. Wales, Scotland and Northern Ireland were ‘over sampled’ to ensure that there were sufficient numbers of interviews for analysis. There were also boosts for rural respondents. Weighting was then applied to correct to their correct proportions. A full unweighted and weighted sample profile can be found in the appendix. For more information about the profile of the sample, see the following slide.

Overall sample size (unweighted) : 3379
Corrective weighting applied on nation and urban/ rural.
Effective sample size: 1984
Full breakdown of sample profile achieved found in appendix.

30 minute interview

28th July to 16th August 2021

Research conducted by an independent research agency: BVA-BDRC

Effective base sizes and degrees of confidence for the quantitative data

Since results are based on a sample rather than the population, we can never be 100% certain that a census would yield the same results. We can however have a certain level of confidence that the true value lies within a given range.

We use a 95% confidence level (the standard in market research) to give a high degree of confidence while also accepting we cannot be 100% confident

This table presents the margin of error within this study

As well as the number of interviews - or specifically the effective base once we take account of weighting - the margin of error will also depend on the amount of variance in the data. The value of percentage indicates how much variance there is with the largest margin of error, hence the most commonly one quoted, being at 50%

	Survey finding of…		
Group (Effective base)	5 / 95%	20 / 80%	50 / 50%
Total Sample (1894)	+/- 1.0%	+/- 1.8%	+/- 2.3%
England (1448)	+/- 1.1%	+/- 2.1%	+/- 2.6%
Scotland (697)	+/- 1.6%	+/- 3.0%	+/- 3.7%
Wales (629)	+/- 1.7%	+/- 3.1%	+/- 3.9%
Northern Ireland (323)	+/- 2.4%	+/- 4.4%	+/- 5.5%
Marketplace sellers (1103)	+/- 1.3%	+/- 2.4%	+/- 3.0%
Non-marketplace sellers (900)	+/- 1.4%	+/- 2.6%	+/- 3.3%

Significance testing is a process which compares the degrees of confidence to see if the difference between two values is greater than the degree of confidence – and hence a ‘significant’ difference. Where this is the case this is denoted using symbols – and this is described on the following slide.

This document contains information from both the qualitative and quantitative research. This slide sets out the key things to be aware of when interpreting the findings in this report.

Slide comprises findings from the quantitative research

Notation describing whether differences between findings are considered to be 'statistically significant' this is based on the degrees of confidence in the data and this is explained in more detail on slide 8.

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Findings are shown where the **effective sample size** is over 45 and the data is flagged as indicative only when the effective sample size is lower than 100. Information around sample sizes is provided at the bottom of all the quantitative charts.

Median is sometimes used as an average. It is the data point in the middle (50th centile). The mean is also used as a comparison.

Slide comprises findings from the qualitative research (and these are also in a different template)

Qualitative research is about understanding why different senders think and do what they do, not how many do overall – findings are based on our research participants

Contains findings relating to digitally excluded from the qualitative research, these are also highlighted with pink text

2. Summary of key findings

The majority of C2X senders, particularly sellers, are making some use of alternative operators. But Royal Mail is still the most used provider.

	Quantitative survey data	*Qualitative findings – from research participants*
C2X parcel sending includes sending to friends and family, marketplace selling and returns	In the last year, 81% of senders have sent parcels to friends and family ('social senders'); 60% have sent items sold on online marketplaces; and 64% have returned parcels to retailers. Most C2X senders carry out a combination of social sending, marketplace selling and returns, with 35% of senders doing all three.	Parcel services were important to all research participants although they served different roles for different types of senders. For social senders, parcel services kept them in touch with family and friends (presents at birthdays/Christmas and with food/care parcels for example) and kept them connected to the outside world in terms of deliveries. Sellers relied on parcel services to fulfil customer orders.
On average, C2X senders despatched seven parcels in the past year	Marketplace sellers sent eleven parcels on average in the last year, versus those that only sent socially and/ or returns (non-sellers) sending three. The overall average was seven.	
Most senders use non-Royal Mail operators, but Royal Mail is the most frequently used	Four in five C2X senders (82%) used Royal Mail to send parcels in the last 12 months - with two in five (37%) only using Royal Mail. Two thirds (68%) only used Royal Mail or used them most frequently. However, almost two thirds (63%) of senders used a supplier other than Royal Mail. Sellers were more likely to have used a supplier other than Royal Mail (73%) compared to non-sellers (47%). Familiarity, trust, and Post Office convenience were the main factors in choice of Royal Mail with the most mentions among both sellers and non-sellers. Sellers were likely to cite price as a reason to use Royal Mail (34% vs. 28% non-sellers), and it was seller's top reason for selecting a non-Royal Mail supplier (35% cited price).	Social senders remained with what is familiar and were not as motivated to seek out an operator other than Royal Mail. Royal Mail is perceived as trusted, reliable and accessible. For social senders (and casual sellers*), the Post Office was particularly important and often the first port of call when sending a parcel. While casual sellers, hobby sellers and SMEs defaulted initially to Royal Mail some were driven by the need to reduce postage costs to expand the range of providers used. Participants who were digitally excluded tended to be reliant on Royal Mail and the Post Office – although this was as much to do with mindset and deep rural location as a limited internet connection.
Senders sometimes lack knowledge of the range of Royal Mail services	Second Class was used by 44% of senders and was more likely to be used by sellers (47% vs. 39% non-sellers). First Class was used by a third (32%), Signed For by 22% and Special Delivery by 3%.	Social senders and casual sellers can have limited understanding of the specifics of services – confusing Online Delivery Confirmation, Signed For and Special Delivery.

*casual sellers are defined as those who do not buy to resell or make to sell. For more detail on sender types please see slide 16

Tracking facilities are often not essential. Tracking has a greater value for packages that are of higher value and by sellers/SMEs.

	Quantitative survey data	***Qualitative findings** – from research participants*
Tracking is valued by some users for some occasions	7 in 10 (72%) senders agree *'increasingly I expect to track the delivery progress of something I send'*. However, half (52%) view tracking as a *'nice to have but not essential'* when sending parcels. A similar proportion (54%) agreed that *'tracking is only useful to me if I am sending or receiving urgent items'.* Other features of parcel services i.e. 'delivery with care', 'proof of delivery' and 'price' were more important than tracking for senders (using Max Diff analysis).	Tracking is an important option but not needed by all and there is confusion around tracking and what it does. Social senders used tracking to provide peace of mind when sending something time-sensitive or of high value/unique and for international deliveries that travel through various postal systems. SMEs tend to be led by customers to some extent – where expectations of tracking are set by experience of bigger businesses/retailers.
Over half of senders were not willing to pay 25p for tracking	Over half (53%) of senders would not pay 25p more for 'core'* tracking services when sending parcels. However, some users were willing to pay a higher price for a tracking service: around one in five non-sellers, and one in four sellers, were willing to pay £1.25 for tracking.	Most senders don't know the cost of tracking but the perception is that tracking isn't/shouldn't be expensive to include. Social senders and sellers reacted negatively to increasing standard parcel postage costs to include tracking – they like the option of a 'cheap' parcel service for less valuable items.
The value of tracking can be context dependent	Willingness to pay increases with the value of the parcel. Around one in seven (16%) would be willing to pay £1.25 to send a package with a value of under £5 compared to 36% with a packaged value of £40.	Feedback from SME participants suggested that tracking was also used when selling a unique/ valuable item.
For senders overall, Royal Mail 1st/ 2nd class services meet the requirement to the same extent with or without tracking	Around half score 8+ out of 10 for the current First and Second Class services (i.e. untracked) as 'meeting their requirements'. The addition of tracking to these services does not shift the proportion who score these services at 8+. However, there is some movement within the data – with a quarter shifting their score upwards and the same proportion downwards.	Non-inclusion of tracking for Royal Mail as standard can be seen as a sign of complacency – and when it is included it can be seen as (too) expensive. However, the essence of tracking, i.e. knowing exactly where the parcel is in the journey to its destination, is rarely a core need in itself.

**core tracking is defined as stage and day of delivery tracking*

Satisfaction levels with Royal Mail and other operators are generally high. But when issues arise, the complaints-handling experience can be variable.

	Quantitative survey data	*Qualitative findings – from research participants*
Satisfaction amongst senders for Royal Mail is higher than the average for other suppliers	Most people (89%) were satisfied with Royal Mail, and this was consistent amongst different types of senders and demographic groups. Amongst other operators, there was some variance, with up to one in ten dissatisfied, However, a majority were satisfied (non-RM average of 72%).	There was reasonable satisfaction overall with deliveries, but there were issues across all providers, including Royal Mail. Common issues for all operators were delays, non-arrival, damaged parcels/packaging and rude staff.
Half of senders in the quant sample had experienced an issue when sending a parcel – although the proportion did vary by operator	Sellers were significantly more likely to have experienced service issues when sending parcels (63% experienced any issue vs. 31% of non-sellers). Disabled consumers (65%) were also more likely to have experienced issues. There was some variance in the proportion of users of different suppliers who had issues when sending a parcel. There was no single issue that dominated but the top scoring issues were time taken versus expectations (26%) and lost/mis-delivered parcels (23%).	For operators other than Royal Mail, key issues were security, damage and leaving parcels in less appropriate spaces, not keeping the recipient informed about diverted deliveries, or not delivered to the door. Experiences as a receiver of parcels can inform views on whether to use a supplier when sending an item.
Experience with contacting suppliers about an issue is variable and outcomes don't always meet expectations	A quarter (24%) found it difficult to make a complaint or contact a supplier with an issue. There were differences across suppliers on how easy this was, with the range of responses saying it was difficult ranging from 20% to 36%. Two in five (37%) of those that contacted a supplier, but didn't complain, said this was because it *'wouldn't change anything anyway'.* One in ten senders (9%) that complained felt the issue was 'not resolved at all', whereas 42% said it was only partly resolved. Around half (47%) did not receive any redress or the level of redress that they were expecting/hoping for. Over half (55%) of all senders that complained to a supplier were satisfied with the response.	Satisfaction with complaint procedures varies – Royal Mail can disappoint consumers when it falls short of expectations – which can be higher than for other operators. Experience with Royal Mail's phone line is inconsistent. But in general, Royal Mail isn't seen to be contesting claims. Participants had more inconsistent experiences with the complaints-handling processes of other parcel operators. The consensus amongst participants appeared to be for all operators to be covered by the same complaints standards

2. Sample profile

Overall quantitative sample profile

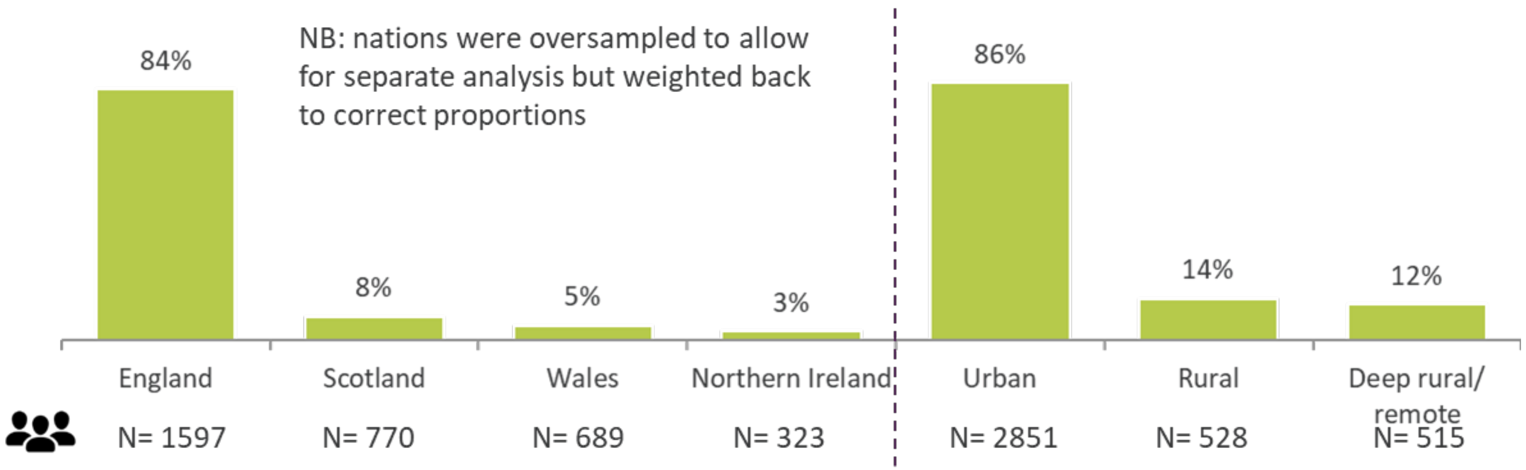
Total unweighted sample size:
N= 3379
Note: %s are weighted* proportions,
N= refers to unweighted base

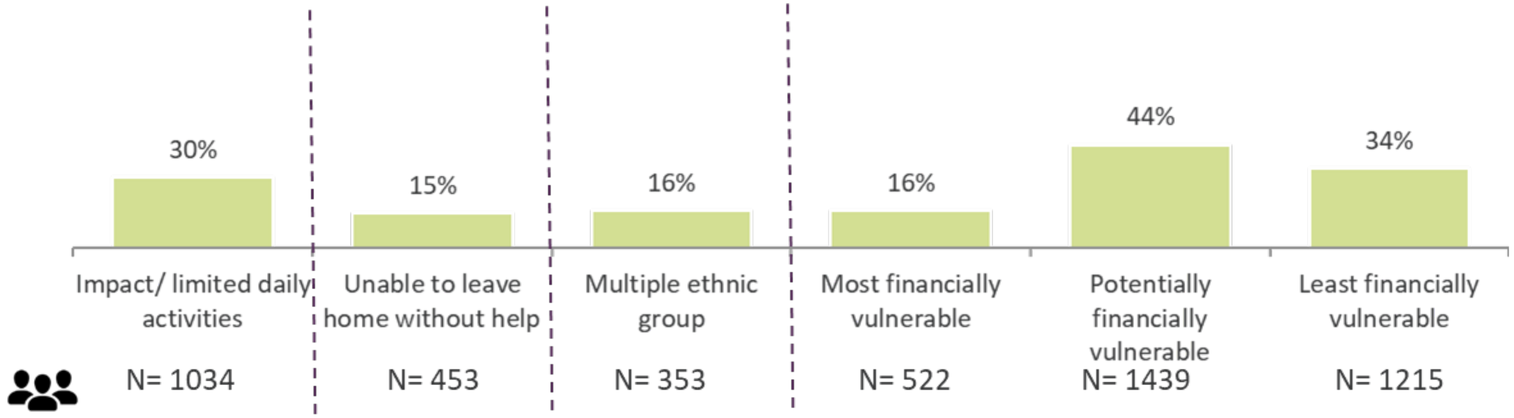
Overall sample definition:
People who have sent a parcel (something larger than a letter or a card), within the UK, in the last 12 months*

There were no quotas on different types of senders however the definition does* ***exclude* *those who only send parcels that are pre-paid returns*

Note: More detail on the total and subgroup profiles, including age, gender and social grade an be found in the Appendix as well as in the following slides

Breakdown of Total sample profile

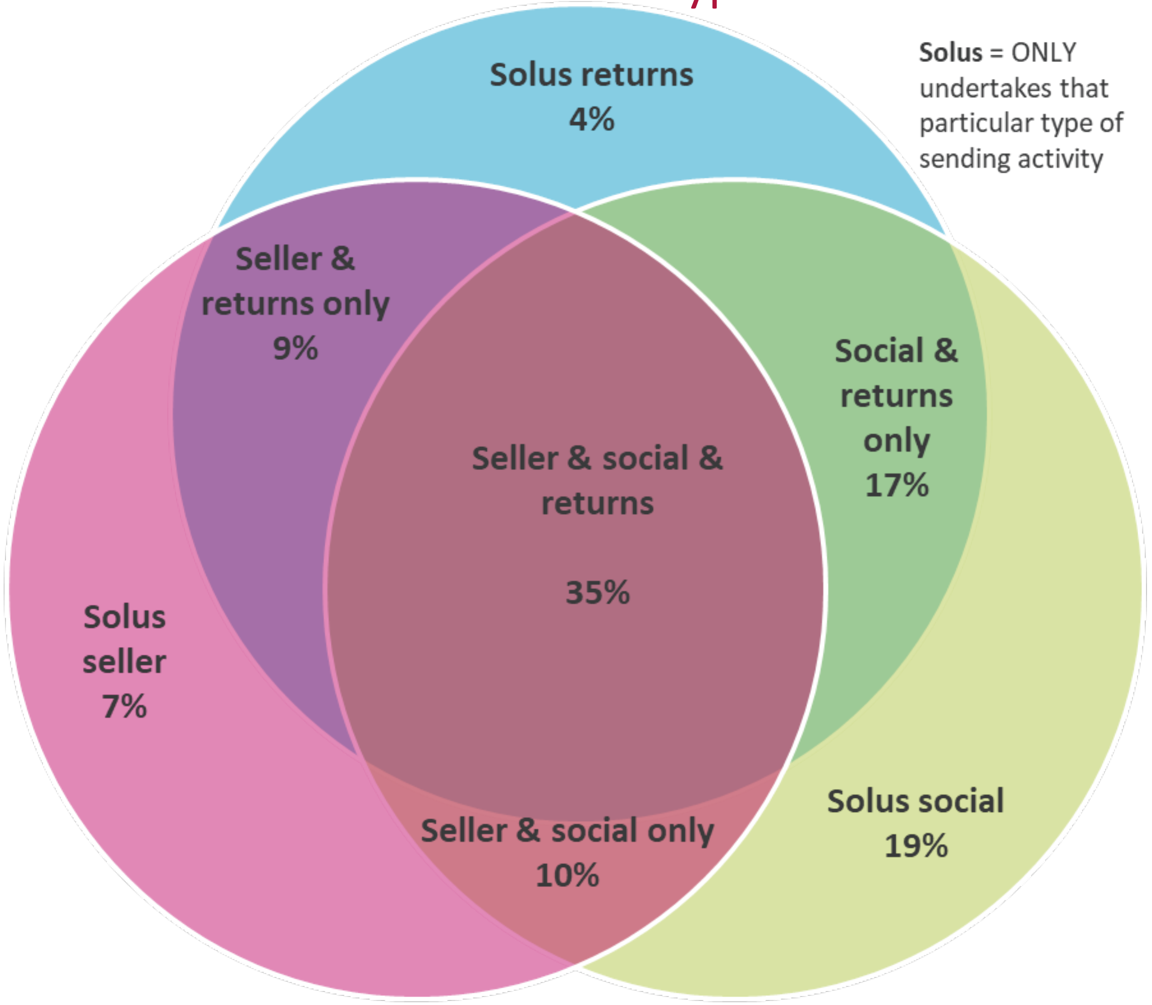




Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

* Data was weighted at the UK level to be representative of the Residential Postal Tracker in terms of age, gender and social grade. Rurality was weighted within each of the devolved nations as well as adjusting their proportions to be in line with current UK profile. Weight targets and unweighted sample profile can be found in the appendix . The weighting efficiency was 59% (Effective Sample Size was 1,984)

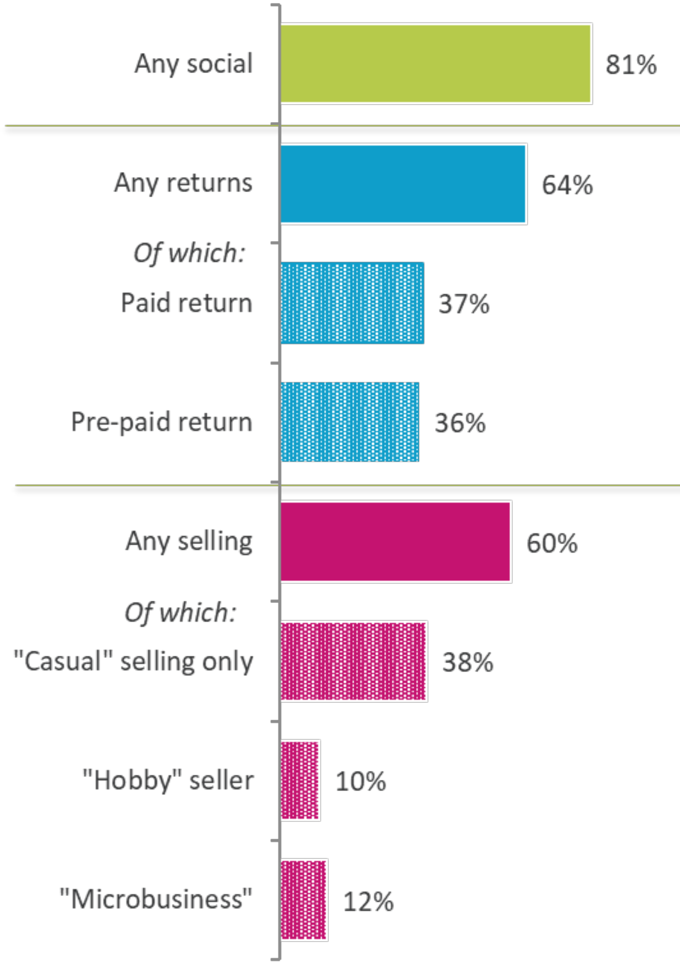
Interaction of different sender types



Solus = ONLY undertakes that particular type of sending activity

Please note all groups are mutually exclusive, a respondent only sits in **one** part of the Venn diagram

Sample splits of different sender groups



Any sending to friends or family

*Any returning items they have bought in parcel**

Returning items they have purchased in a parcel and paying for postage

Returning items they have purchased in a parcel and not paying for postage

Any of casual selling, hobby selling, or microbusiness selling

Have sent items they have sold online – but these were not items that they had specifically purchased or made to sell

Have sent items they bought to re-sell/ send items they/ their company created. Turnover below £1K

Have sent items they bought to re-sell/ send items they/ their company created. Turnover above £1K

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

*NB: respondents who ONLY sent parcels that were pre-paid returns were excluded from this research

Profile of All marketplace sellers (“Sellers”) in charts

60% of respondents are Sellers

N= 1934

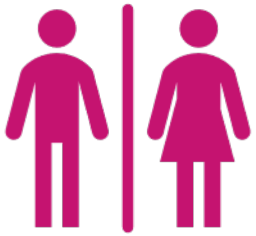
Consumers who have sent at least one parcel, containing items they have sold online, within the UK in the last 12 months

Note: More detail on the Sender profiles can be found in the Appendix

Splits by level of financial vulnerability*

Level of financial vulnerability	All Marketplace Sellers
Most financially vulnerable	18% ▲
Potentially financially vulnerable	41%
Least financially vulnerable	36% ▲

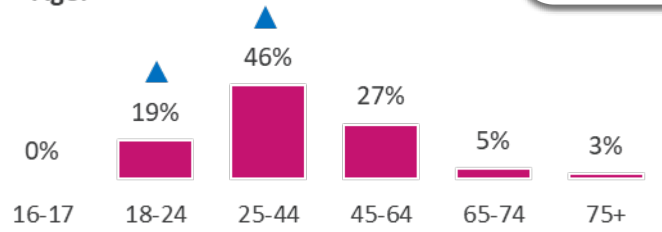
Gender:



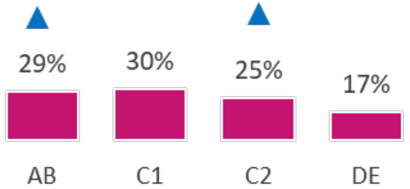
50% Male

50% Female

Age:



Social Grade:



▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

SELLERS:
Income

Hobby sellers: All defined as having income from selling as under £1000 – mean income: £418

Micro business sellers: All defined as having income from selling as over £1000 – mean income: £10,250

Type of items selling

Items no longer need: 87%

Items I/ my company created: 15%

Purchasing items and reselling: 32%

Sites used MOST *(99% identified a marketplace, 1% their own online shop)*

Site	%
eBay	**51%**
Facebook/ Marketplace:	**18%**
Amazon	**10%**
Depop	**5%**

4%: Gumtree, 3% Etsy, Vinted, Instagram, 1% Trouva, Not on the high street, Wish.

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

*See appendix for method of calculation

Profile of All Non marketplace sellers (“Non sellers”) in charts

All Non marketplace sellers (“Non-sellers”)

40% of respondents are Non sellers

N= 1445

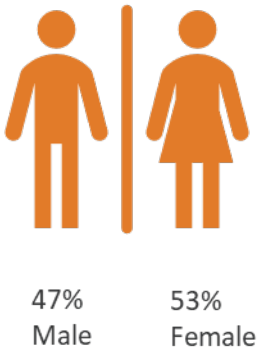
“Non-sellers” are those who do not send parcels of items they have sold on marketplaces and comprise solus social senders, solus returners and social and returners only

Note: More detail on the Sender profiles can be found in the Appendix

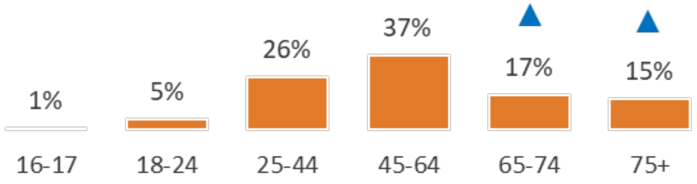
Splits by level of financial vulnerability*

Level of vulnerability	All Non Marketplace Sellers
Most financially vulnerable	13%
Potentially financially vulnerable	49% ▲
Least financially vulnerable	30%

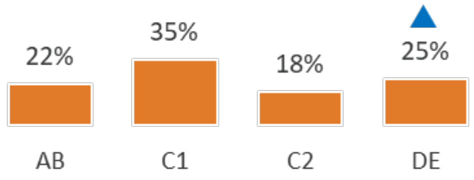
Gender:



Age:



Social Grade:



▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

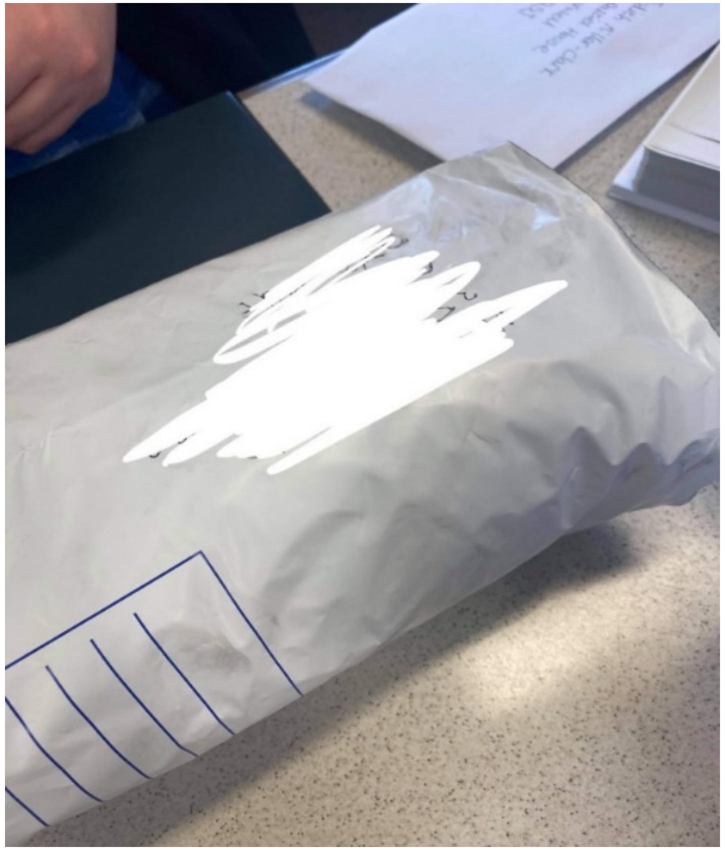
*See appendix for method of calculation

3: About C2X senders

Qualitative slide

What they sent: Social sender participants

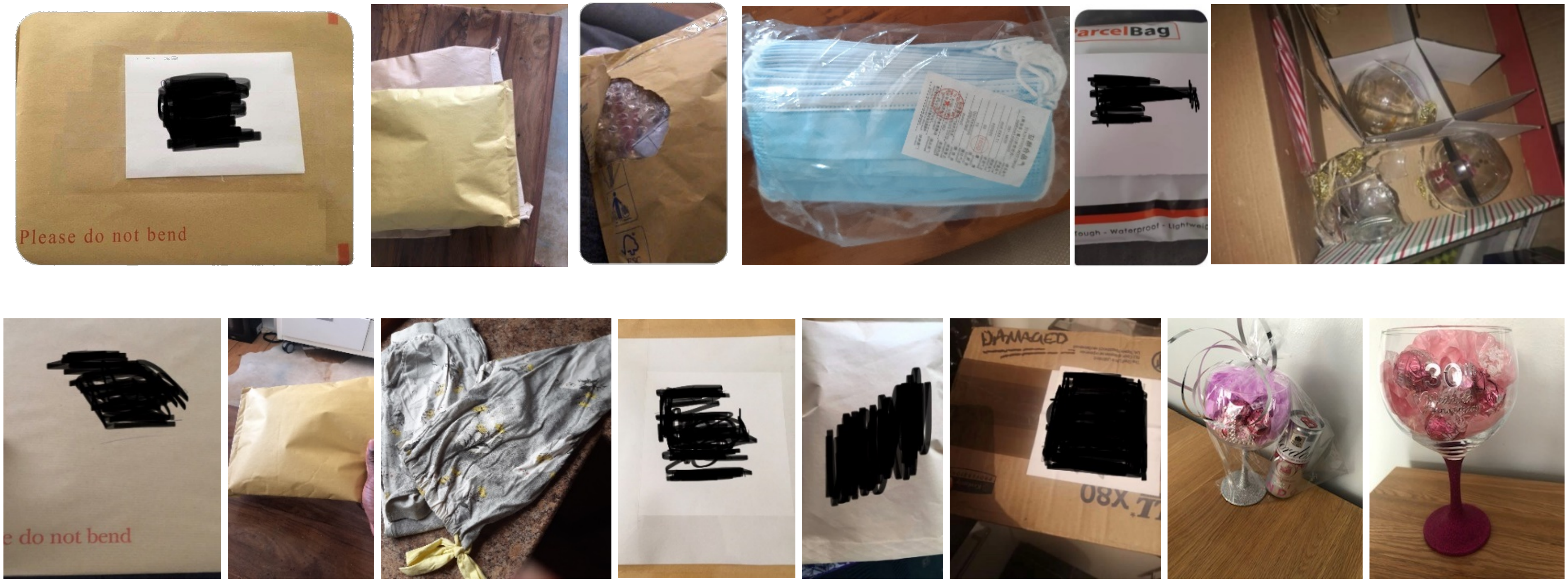
Tended to send presents (birthdays, Christmas, engagements, weddings), food parcels for grandchildren at university and unused/unwanted items such as books and bicycles (Images show photos by respondents of the parcels they send and receive)



Qualitative slide

What they sent: Hobby & casual seller participants

Unwanted goods such as games, sporting equipment, trainers etc and craft items they make themselves (Images show photos by respondents of the parcels they send and receive)



(Qualitative slide

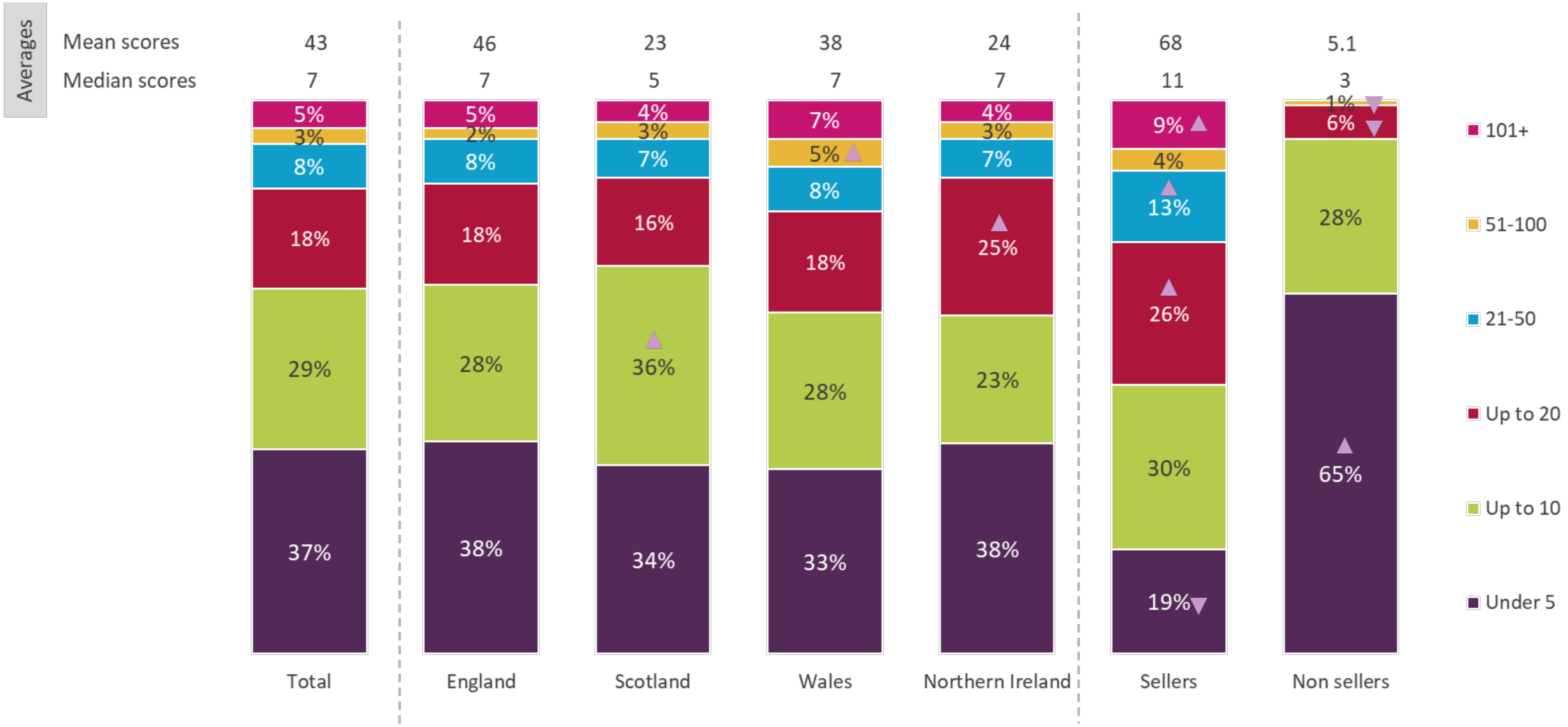
What they sent: SME/ Microbusiness participants

An eclectic range of goods, from arts to artisan chocolates, to party goods and pet gifts
(Images show photos by respondents of the parcels they send and receive)

Two-thirds of non-marketplace sellers sent 5 or fewer parcels in the past year

Median average score for Sellers was 11, for Non-sellers was 3

Number of parcels **sent** in the UK in the last 12 months



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QS1/ QS1a: Approximately how many parcels have you **sent** in the last 12 months for each category? A parcel is something that's larger than a letter or card. WE are only interested in parcels you have sent in the UK (i.e. England, Wales, Scotland, Northern Ireland) and not abroad (Categories – Parcels sent to friends and family/ Parcels you have sent containing items you have sold online/ Parcels that are returning items you have been sent). / How many parcels on average, do you send **per week**?

Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Qualitative slide

Parcel services were important to all participants although they served different roles for different types of senders

Even though social senders mailed parcels less frequently than hobby sellers and SMEs, parcels services were no less important

Social senders

- Reliant on parcel services – particularly…
  - Residents of remote rural areas and communities
  - Those living with physical impairments
- Parcel services were vital for these participants
  - Kept them in touch with family and friends (at birthdays/ Christmas presents and with food/care parcels for example)
  - And kept them connected to the outside world in terms of deliveries

Hobby sellers and SMEs

- All relied on parcel services to fulfil customer orders
- **For some SMEs the parcel service was so vital it was seen as an extension of their brand** - there was concern that a choice of a poor parcel services provider could damage repeat business – reflecting poorly on them
- Participants with newer/smaller businesses feared negative reviews could harm their brand. It was essential they had a 'good' parcel provider as delivery is a vital part of the customer experience
- But this did depend on what the business was selling,
  - Higher volume and cheaper items tended to be sent in the cheapest way possible
  - Easily replaced/less of an issue if they went missing (not part of a 'premium' experience)

Qualitative slide

Human connection at Post Office can be important, particularly for participants who were social senders

(Symbol denoting without internet)

- On the whole they got to know the staff working in the Post Office
  - Trusted them to make the right recommendation for the parcel they want to send – the consensus seemed to be that they were at least sometimes unsure which was the best way to send their parcel
- A human touch to the parcel service was lacking from most other parcel delivery companies
  - At the Post Office could just turn up with the box
  - Post Office staff measure it, weigh it and ask questions to establish which service is most appropriate (e.g. when does it have to be there, how much is it worth) and then send it

- The Post Office was particularly valued by participants in remote rural communities – it made them feel connected to the outside world
  - Even some of the most remote participants had a Post Office in their local community, usually as part of the village shop. These branches may have had limited opening hours and were often busy, but they appreciated its presence in the community
  - *(Pink text to denote finding specific to respondents without internet): Where the local Post Office had closed without a convenient alternative available (within c10 miles), participants could feel very isolated*
- Some participants who were younger social senders interacted less with the Post Office staff
  - Visiting the Post Office but choosing to self-serve where available (to avoid queues)

Key needs from parcel services

For participants who were social senders and casual senders, the overriding need was one of convenience – getting the parcel into the postal system with minimal effort and hassle-free receiving. Hobby sellers and business participants tended to be more cost sensitive where their margins are tighter.

Needs of social senders/casual seller participants when sending:

- **Convenience**: a cognitively easy process of getting post in the system
- **Trust**: reliable services – to know the parcels will arrive and have a good idea when (comes from familiarity)
- **Timeliness**: option for urgency if required
- **Cost effective options**: various options at different price points, including low-cost ways of sending high value/bigger/heavier parcels

Needs of social senders/ casual seller participants when receiving:

- **Delivered to the door**
- **Ease/convenience of pick up**: accessible locations to pick up if can't deliver to door (particularly for those with physical impairments) or flexibility when delivering (leave in agreed safe places for example)
- **Track**: for more urgent/valuable items
- **Arrive in good condition**

Needs of hobby sellers and SME participants when sending:

- **Cost**: volume of parcels sent means sellers get cost sensitive quite quickly, additional sending costs eat into margins
- **Reliability**: knowing the item will arrive in good condition (reflects well on you/your brand)
- **Certainty**: the customer knows when it is likely to get there and can track its arrival
- **Timeliness**: An option to send out urgent parcels
- **Proof of delivery**: to stop customers claiming they have not received the item

Needs of hobby sellers and SME participants when receiving:

- **Arrive in good condition**
- **Tracking**: Want to know when to expect it. Tracking and text updates helps provide peace of mind (keep supply chain going)
- **Ease/convenience of pick up**: nearby locations to pick up if can't deliver to door, and/or is receiver is out
- **Delivery time**: especially for sole traders so can ensure at home/office to receive

Qualitative slide

Getting parcels into the system easily was a key need and yet could be the biggest pain-point for participants

Accessing the parcels system

- On the whole, consumers and some SMEs had little understanding of services available
  - Not confident they would select the right service on their own (only a few self-serve at the Post Office)
- Not having a printer means parcels must be sent via Post Office/Depot
  - Unable to self-serve from home
- Costs could be an issue
  - Postage and collection service
  - Particularly where high volumes/ heavy items being sent
- Heavy/large items could be difficult and expensive to send
  - Particularly for social senders – often unaware of alternatives

Issues with the delivery of parcels

- Lost parcels/not delivered on time
  - Could reflect badly on the SME
  - Often out of pocket when they refund/replace the item – little awareness of being able to look for parcel even if not tracked
- Parcel arrives damaged
  - Again, reflects badly on the brand, and SME out of pocket
  - Hassle for the customer trying to get a refund/ replacement

Reflecting on their experience as receivers of parcels, the consensus seemed to be amongst participants that getting the parcel, if not delivered to door, can be challenging

- Distance to depots/sorting offices can be inconvenient – particularly with those in rural communities
  - Can take a couple of days (with reduced opening hours) - issue particularly for perishable goods
  - Royal Mail depots can be closer, although for those in rural communities they can still be a significant distance away
  - Competitor depots can be in an inconvenient location – often a fair distance away

4. C2X sending habits

Qualitative slide

Context for the research was that, on the whole, participants pointed to increased reliance on parcel services during the pandemic

Lockdown saw the volume of parcels being sent/received increase – quite dramatically for some participants

Shoppers being unable/unwilling to visit shops has meant many more are buying online

And some businesses have moved online to survive in this climate

With social senders unable to meet up with friends/family for birthdays/ Christmas, gifts must be posted

- Royal Mail is primarily the operator of choice for such parcels
- 'Default' if little/no experience of sending parcels

Receipt of parcels could feel more urgent during lockdown

Some social senders participants sending gifts, if not used to doing so (rather giving them in person), could run late with posting

- Special Delivery often then used to ensure the parcel is there for the special occasion

Keeping customers satisfied was important for many SME participants

- Part of the brand experience
- Where the market is competitive, delivery options need to match what rivals offer with speed/cost
- Expectations can be set by experience of large corporates offering next day/tracked delivery

But more 'standard' postal services remain as important

With other types of SME participants, urgency was less of an issue

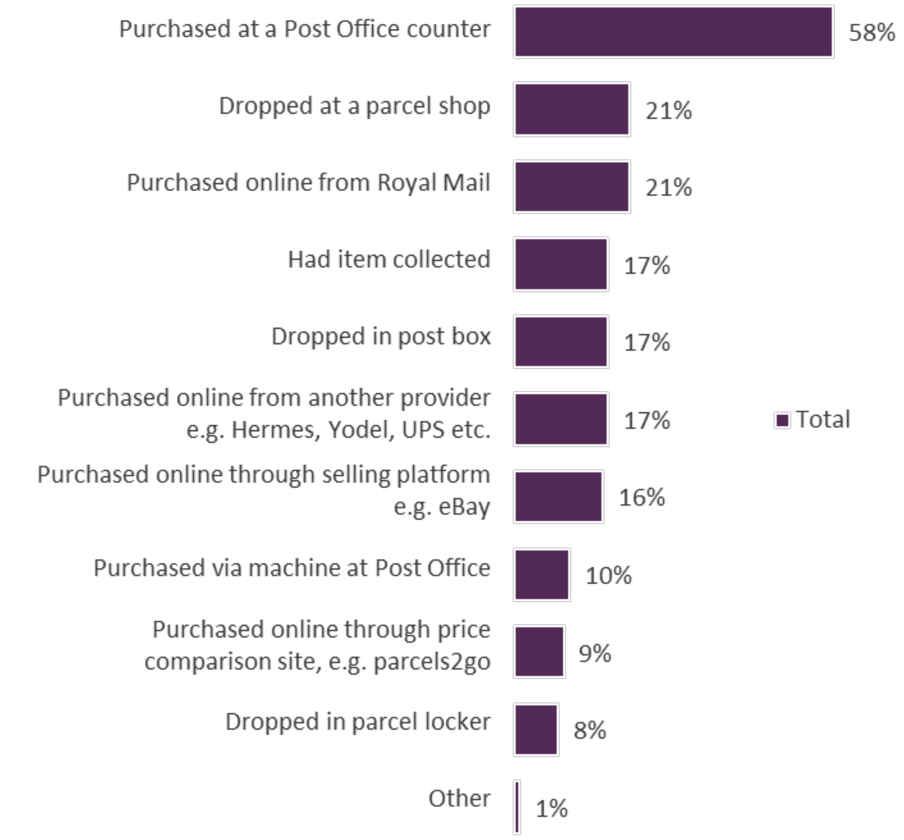
- If what they are offering is unique/ rarer, then customers can't easily go elsewhere
- With cheaper items, tracking (for example) can be less of an issue - more important that it just gets there (confirmation of delivery would suffice in many occasions)
- Consumers can also cut the smaller businesses a bit of slack when it comes to delivery – don't always expect the 'slickness' of larger corporates

7 in 10 non-sellers used a Post Office counter to purchase postage or to despatch parcels

Post Office counter usage was significantly lower for sellers. All other methods are *more likely* to be used by sellers

making communications work for everyone

Methods used to purchase postage/ despatch parcels in the last year



	England	Scotland	Wales	Northern Ireland	All Marketplace Sellers	All Non Marketplace Sellers
Purchased at a Post Office counter	58%	55%	55%	62%	48% ▼	71% ▲▲
Dropped at a parcel shop	21%	21%	18%	20%	25% ▲▲	15%
Purchased online from Royal Mail	21%	18%	20%	21%	27% ▲▲	12%
Had item collected	17%	18%	19%	14%	21% ▲▲	12%
Dropped in post box	17%	17%	19%	18%	19% ▲	14%
Purchased online from another provider e.g. Hermes, Yodel, UPS etc.	17%	16%	17%	11% ▼	19% ▲	13%
Purchased online through selling platform e.g. eBay	17%	14%	15%	12%	23% ▲▲	6%
Purchased via machine at Post Office	10%	10%	8%	8%	13% ▲▲	6%
Purchased online through price comparison site, e.g. parcels2go	10%	8%	8%	6%	14% ▲▲	3%
Dropped in parcel locker	9%	8%	5% ▼	7%	12% ▲▲	3%
Other	1%	0%	0%	0%	1%	1%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QD2a: And which of these methods have you used to **purchase** postage and to **despatch** parcels in the last year?

Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Qualitative slide

For many participants, Royal Mail was the primary service operator and a trusted brand with a range of services for most needs

Social Senders and casual seller participants

The Post Office was the first port of call/default destination when social senders had a parcel to send, even amongst those who were **not** *digitally excluded*

Advice on hand in the Post Office to help determine the best option - and peace of mind of having parcel measured/ weighed (and label printed) – know they have the right option

Don't know where else to go (tend not to shop around), but larger/heaver parcels can prompt some to look elsewhere

Hermes used by some participants with physical impairments who can't get heavy/big items to a Post Office as they collect from door

Casual and Hobby Sellers and SME participants

Many business owners defaulted to what they knew best from their social sending experience in the early days - which tended to be Royal Mail

Lots of worry when setting up a business and attracting customers - don't want anything to put customers off in the early days or to have to worry about finding out about different operators of parcel services

(Although one SME participant based their whole business idea on something they knew they could send as a large letter, so they thought about delivery first!)

But as sellers/ SMEs become more established/experienced, some start to expand the range of operators tested/used – this is primarily cost driven.

Those selling more of a commodity (e.g. party supplies) with more direct competition would look for cheaper parcel services to take a bit of the pressure off their margins

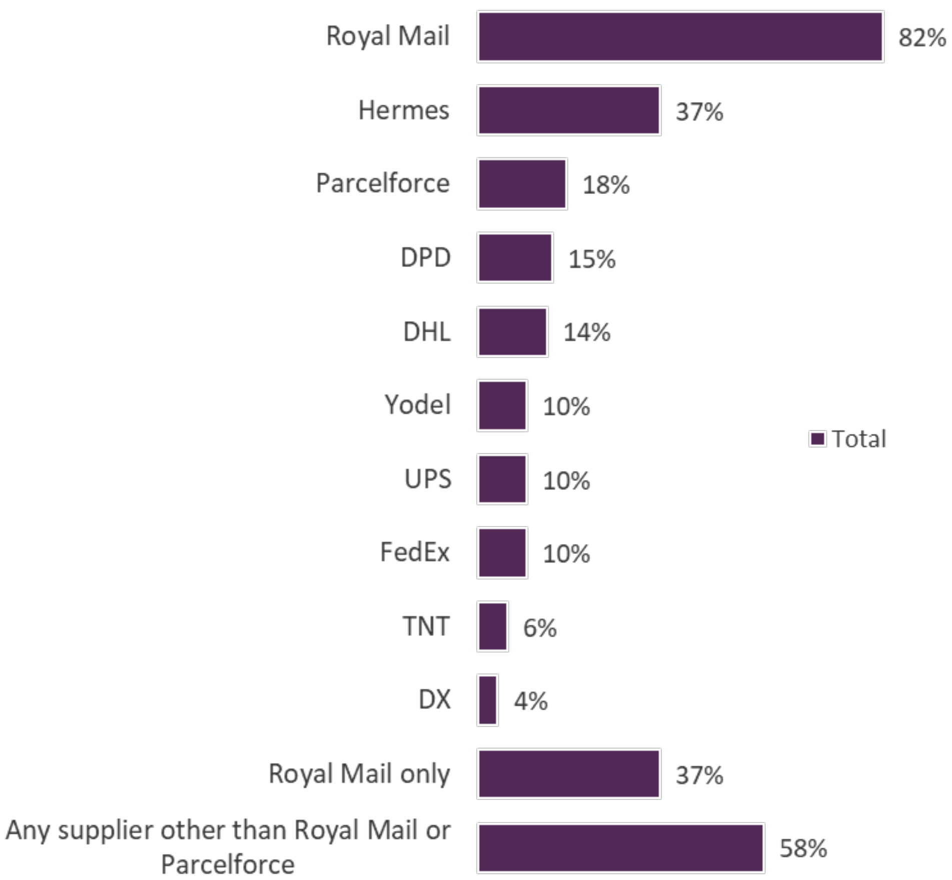
Those sending items that are either perishable (artesian chocolates, medications) or 'one-offs' (vintage items, collars, art etc) would use Royal Mail as they trust the organisation to deliver these more precious items - and consumers are more willing to pay for more expensive postage

Section 5
Choice of operator

After Royal Mail, Hermes was the next most widely used supplier to send parcels

Royal Mail was less likely to be used by sellers than non-sellers. Just over half of non-sellers **only** use Royal Mail.

Suppliers used to send a parcel in the last 12 months



	England	Scotland	Wales	Northern Ireland	All Sellers	All Non Sellers
Royal Mail	82%	81%	85%	87% ▲	79% ▼	87% ▲▲
Hermes	37%	33%	42% ▲▲	30%	44% ▲▲	27% ▼
Parcelforce	17%	18%	15%	24% ▲	21% ▲▲	12% ▼
DPD	15%	19% ▲	18%	12%	19% ▲▲	10% ▼
DHL	15%	13%	10% ▼	14%	17% ▲▲	10% ▼
Yodel	10%	14% ▲	14% ▲	9%	14% ▲▲	5% ▼
UPS	10%	8%	7% ▼	6% ▼	14% ▲▲	4% ▼
FedEx	10%	8%	8%	6% ▼	14% ▲▲	4% ▼
TNT	6%	6%	2% ▼	4%	8% ▲▲	2% ▼
DX	4%	3%	1% ▼	2%	6% ▲▲	1% ▼
Royal Mail only	38%	35%	37%	41%	27% ▼	53% ▲▲
Any supplier other than Royal Mail or Parcelforce	58%	59%	58%	47%	69%	40%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QB1: Which, if any, of these companies have you used to **send** a parcel in the past 12 months?

Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323) All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

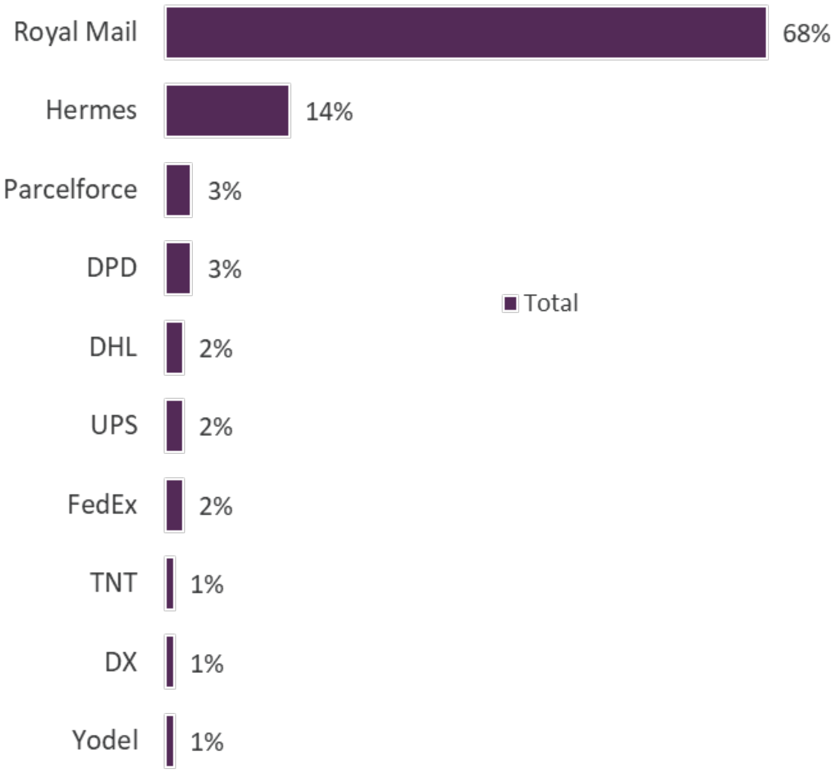
▲▼ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Royal Mail was most frequently used for over two-thirds of senders (62% of Sellers and 78% of Non-sellers)

Suppliers used most frequently to send a parcel in the last 12 months



	England	Scotland	Wales	Northern Ireland	Sellers	Non Sellers
Royal Mail	68%	64%	69%	74%	62% ▼	78% ▲ ▲
Hermes	14%	11%	17% ▲	9% ▼	16% ▲	11% ▼
Parcelforce	3%	4%	2%	6% ▲	4%	3%
DPD	3%	6% ▲	3%	3%	4% ▲	2%
DHL	2%	3%	1%	2%	3%	2%
UPS	2%	2% ▲	1%	0%	3% ▲	1% ▼
FedEx	2%	1%	1%	2%	3% ▲ ▲	0% ▼
TNT	1%	2%	0% ▼	0%	2% ▲	0% ▼
DX	1%	1%	0%	1%	1% ▲	0% ▼
Yodel	1%	2% ▲	2%	1%	2% ▲	0% ▼

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021
QB1/ QB2: Which, if any, of these companies have you used to **send** a parcel in the past 12 months?/ And which have you used most frequently?
Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*
▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*
▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Participants who were digitally excluded tended to be more reliant on Royal Mail

Digitally excluded participants primarily relied on the Post Office for sending parcels

However, this was often as much due to their deep rural location and mindset as their limited internet connection

- Some social sender participants (predominantly older, aged 75+) did not know how to send parcels via any other service than Royal Mail and given their lack of digital connectivity, they don't have the same means of (or inclination to) research alternatives

"I've seen the Hermes van around, but I have no idea how to send anything with them"

- Participants in remote areas tended to be under the impression they are only served by a limited subset of operators, typically Royal Mail, Hermes and Menzies (who provide the final stage of delivery in parts of Scotland for carriers including DPD and UPS).
- If they had an issue with either (when receiving parcels), they felt compelled to rely on Royal Mail

As a result, while digitally excluded participants could struggle to access parcel operators that serve customers online**, this did not tend to be the primary limiting factor** as they often don't get that far

Qualitative slide

Digitally excluded participants felt particularly impacted by Post Office closures

Some participants in rural areas had seen their local Post Office close in the past couple of years (the deaths of local postmasters and/or closures saw three respondents left without a local Post Office)

In one case a Royal Mail service was provided by a van, but this was not seen as a reasonable alternative

- Only comes twice a week, during working hours (not Saturday)
- Can only take a limited number of parcels (issue at Christmas)

In another case, the village hall becomes a Post Office a couple of days each week, but has limited/confusing hours

- Perception that delivery is often delayed (takes longer to get into parcel system) - an issue if sending perishables (e.g. care parcels

Post Office services can be provided via local shops (such as Spar)

- Can be a ‘Godsend’ providing access to simpler parcel services (1st/2nd class, tracked etc)
- But for services that consumers perceive as more complex (e.g. international tracked delivery), a ‘proper’ Post Office is much preferred

Where access to the Post Office is limited, senders were reliant on others (children primarily) to:

- Take them and/or their parcels to the nearest village with a Post Office
- Help sort out postage online (measure/ weigh/purchase postage) – then take parcel to Post Office (no awareness of Parcel Collect)
- Parcels collected in one village

As a result some try to send smaller items that can fit into a ‘large letter’ envelope (so they don’t have to go to the Post Office)

More mobile consumers tend to wait until they need to go to nearest ‘big town’ and then also use a Post Office

- Enjoy the trip/’day out’
- But appreciate this isn’t a sustainable set of circumstances (may not always be as mobile) and may need to rely on others before too long

Qualitative slide

SME participants were more likely to use alternatives to Royal Mail's parcel services than social senders/hobby sellers

Barriers to switching for social senders/casual/hobby seller participants:

Many non-SME participants **didn't even consider 'shopping around'** and using alternative operators for parcels

- Some of this was **force of habit** – they just always go to the Post Office
- For some (those in more rural communities and Northern Ireland) there were often **no alternatives available** (or none that are easily accessible)
- For occasional parcels, most were willing to pay Royal Mail's prices for the convenience and trust - **don't send enough parcels for cost to be much of an issue**
- But for many it was because they have **no idea how and where to access alternative operators**
- Non-SME participants that used other parcel services, do so because they have **bigger /heavier items to send**, or **specific needs** (e.g., sending from/to the Highlands and Islands) - when Royal Mail can seem expensive

Barriers to switching for SME participants:

SMEs could be more motivated to **shop around** for alternative operators. Heavier users can be more aware that cheaper alternatives are available, and so other providers have - on occasion – been sought either directly or via price comparison websites.

But the concern raised by participants with using price comparison websites is **whose responsibility it is when things go wrong** – it could take a while to investigate the issues. Meanwhile the seller is out of pocket if they refund/resent the item.

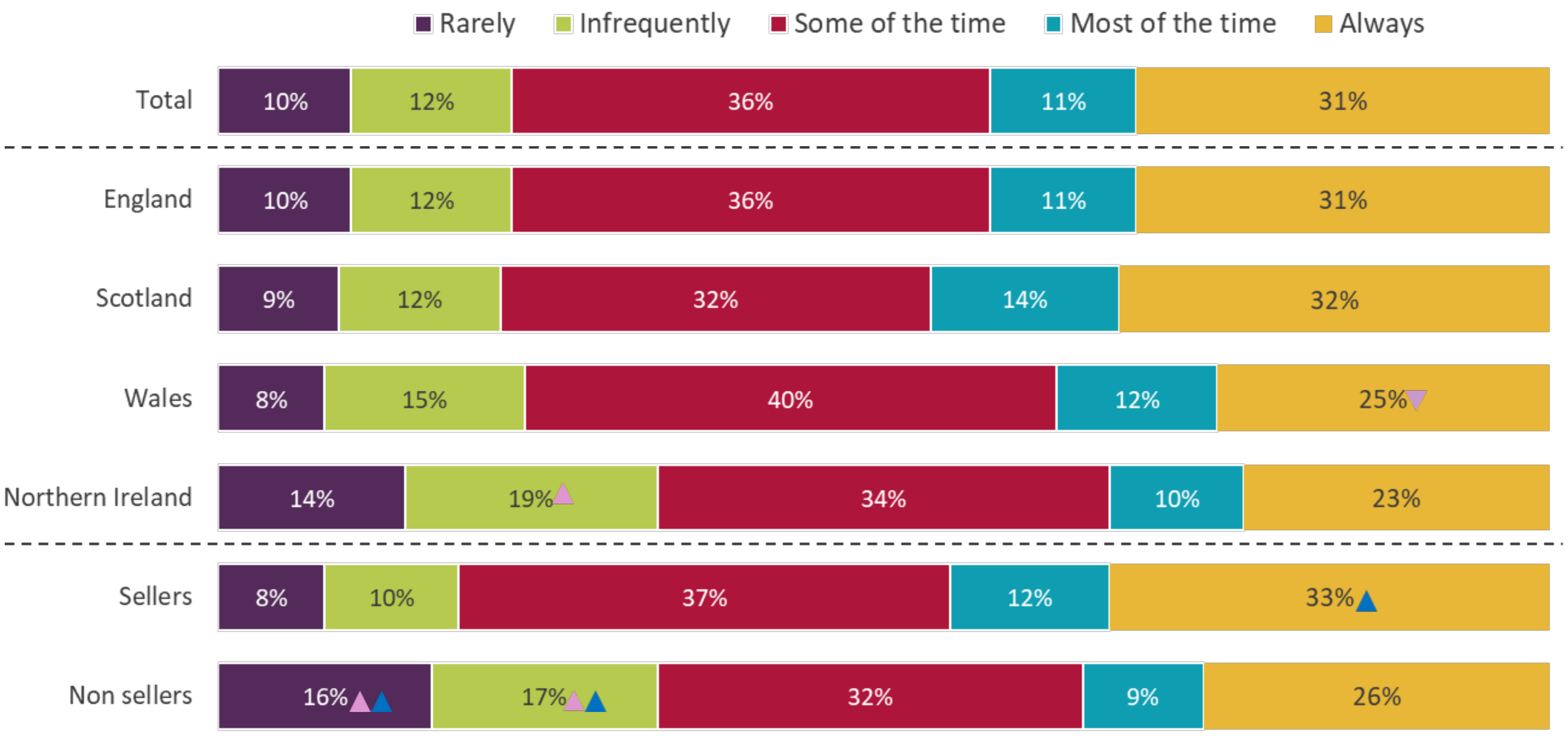
Casual seller participants tended to look at price comparison websites to **check out prices**, but appeared less likely to send through them

The main barrier to using price comparison websites expressed by participants however was **awareness** – aside from a few SMEs/hobby sellers, none knew such sites existed (and on the whole, had not used)

Among sellers that used a supplier other than Royal Mail, a third always did so

Non-sellers more likely to use other suppliers rarely or infrequently (33% vs. 18%)

Frequency of using Non Royal Mail suppliers (among those that use a supplier other than Royal Mail)



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QB2b: You said you used delivery companies other than Royal Mail to send parcels. When sending something in the last 12 months, would you say that you use these other delivery companies…

Base: All using Non Royal Mail suppliers: Total (2013), England (940), Scotland (480), Wales (417), Northern Ireland (176), All Marketplace Sellers (1361), All Non marketplace Sellers (652).

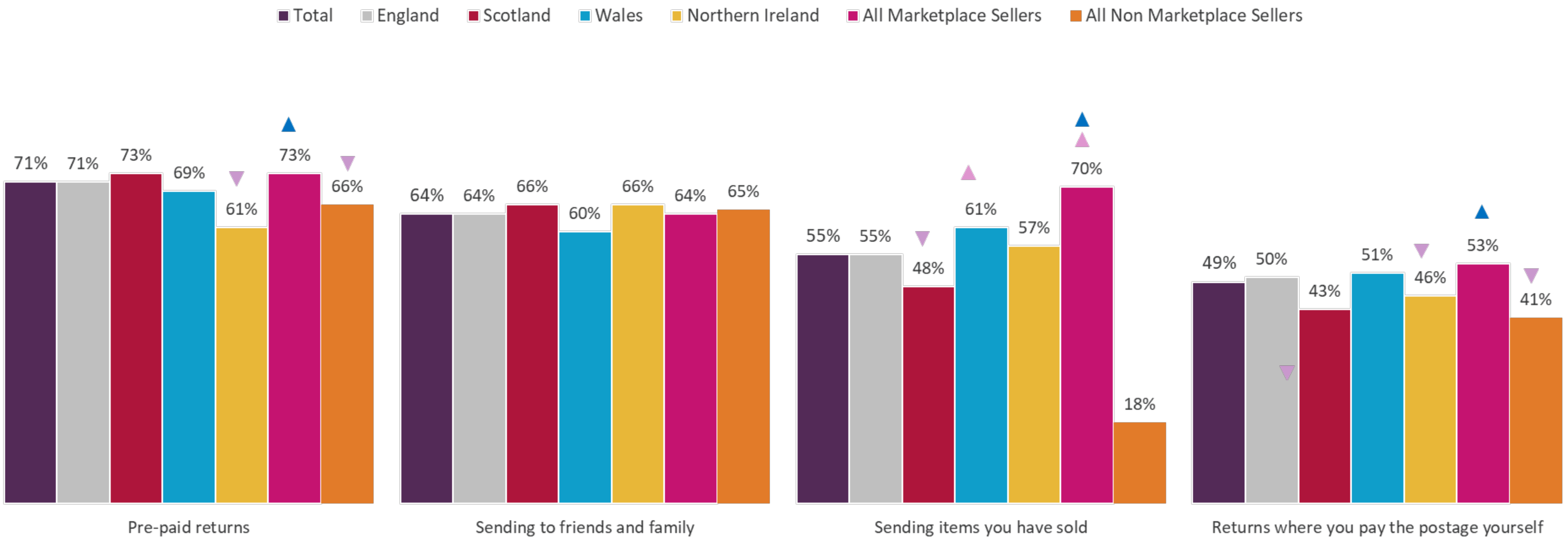
Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

There were a variety of reasons for sending via suppliers other than Royal Mail

Purpose of using Non Royal Mail suppliers



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QB2c: When you are using companies other than Royal Mail, which of these purposes do you use them for?

Base: All using Non Royal Mail suppliers: Total (2013), England (940), Scotland (480), Wales (417), Northern Ireland (176), All Marketplace Sellers (1361), All Non Marketplace Sellers (652).

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Familiarity, trust and convenience were key reasons Royal Mail was used

But price was also significantly more important for sellers vs. non-sellers

making communications work for everyone

Reasons for using Royal Mail to send parcels
(amongst those who use Royal Mail)

		England	Scotland	Wales	Northern Ireland	All Sellers	All Non Sellers
Post office is convenient/ accessible	60%	60%	61%	58%	61%	54% ▼	68% ▲ ▲
Familiar with Royal Mail	55%	55%	58%	53%	58%	48% ▼	64% ▲ ▲
I trust Royal Mail	53%	52%	56%	57%	56%	49% ▼	59% ▲ ▲
Post Office has helpful, friendly staff	34%	34%	33%	35%	38%	31%	38% ▲ ▲
Price	31%	32%	31%	30%	30%	34% ▲	28%
Provide assurance/ proof of delivery	31%	31%	30%	26% ▼	39% ▲ ▲	31%	32%
Confident they will offer a good quality service	31%	31%	32%	30%	31%	31%	32%
Royal Mail takes good care of parcels	31%	31%	31%	28%	34%	30%	31%
Able to select a particular speed of delivery	15%	16%	14%	14%	13%	15%	16%
Insurance options that meet my needs	11%	11%	10%	9%	12%	14% ▲ ▲	7% ▼
Royal Mail was recommended by the retailer…	9%	9%	9%	9%	11%	10%	8%
Able to select particular dates/ times for delivery	8%	8%	8%	9%	10%	11% ▲ ▲	4% ▼

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QC2a: You said earlier you use Royal mail to send parcels. Why is that?

Base: All who use Royal Mail to send parcels: Total (2830), England (1329), Scotland (621), Wales (591), Northern Ireland (289), All Marketplace Sellers (1560), All Non Marketplace Sellers (1270)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

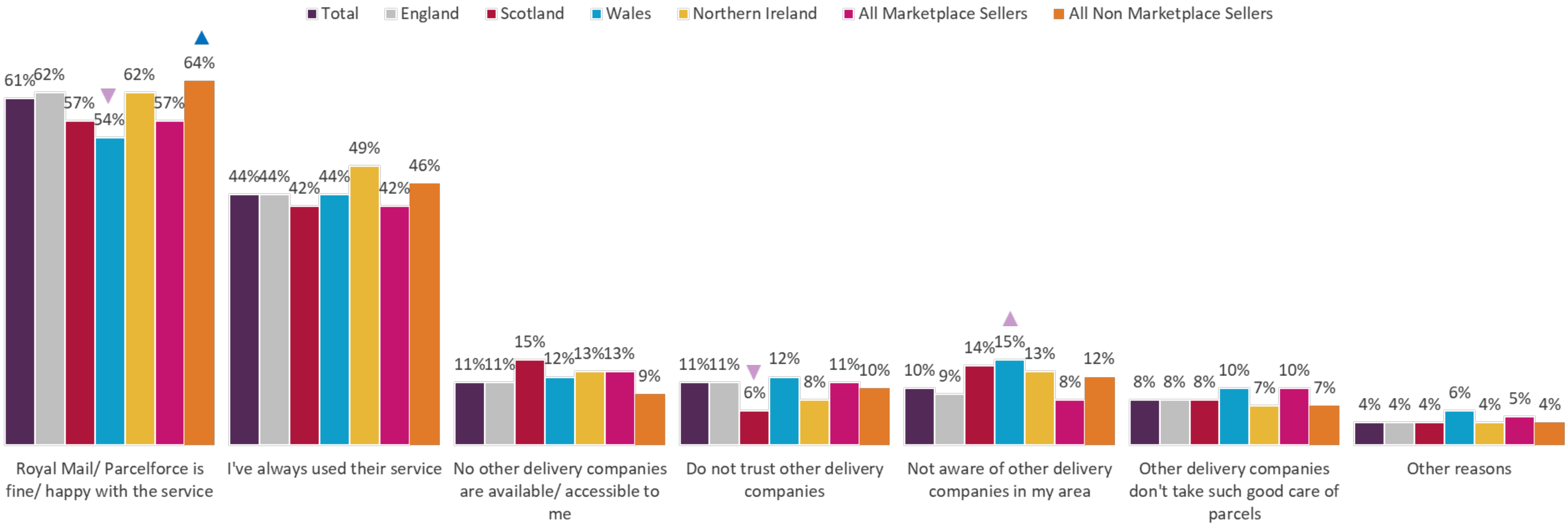
▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Main reasons for only using Royal Mail or Parcelforce ‘happy with the service’ and ‘always used their service’

making communications work
for everyone

Reasons for only using Royal Mail/ Parcelforce to send parcels (amongst those who only use Royal Mail/ Parcelforce)



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QC2b: You said you didn’t use any delivery companies other than Royal Mail/ Parcelforce. Why is that?

Base: All who only use Royal Mail/ Parcelforce to send parcels: Total (1496), England (710), Scotland (324), Wales (289), Northern Ireland (173), All Marketplace Sellers (653), All Non Marketplace Sellers (843)

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Compared to the overall total of those using other suppliers, **price** was significantly more mentioned as a reason for choosing Hermes and was significantly lower for Parcelforce

Reasons for choosing a Non Royal Mail supplier to send parcels (amongst those who use the supplier)

	All NOT RM only	Hermes	DPD	Parcelforce	Sellers	Non-sellers
Price	34%	43% ▲	27%	25% ▼	35%	32%
Tracking included as part of the service	32%	34%	23% ▼	36%	30%	36% ▲
Familiar with the parcel sending service	27%	27%	24%	35% ▲	27%	29%
I trust them	27%	24%	29%	38% ▲	26%	31%
Convenient/ accessible sending points	26%	32% ▲	20%	28%	25%	30% ▲
Confident they will offer a good quality service	23%	20%	23%	30% ▲	21%	26%
They take good care of parcels	23%	22%	21%	27%	23%	22%
Provide assurance/ proof of delivery	22%	19%	20%	30% ▲	22%	20%
Helpful, friendly staff	20%	18%	16%	26%	19%	22%
It was the operator that was recommended by the retailer when returning an item	19%	19%	17%	15%	17%	22%
I've always used their service	16%	12%	14%	26% ▲	18%	13%
Able to select particular dates/ times for deliver	14%	11% ▼	15%	12%	15% ▲	11%
Able to select particular speed of delivery	13%	11%	22% ▲	15%	15%	11%
Insurance options that suit my needs	12%	10%	14%	16%	15% ▲	7%
Other reasons	3%	4%	1%	3%	2%	6%
Don't know	1%	2%	0%	3%	1%	2%

■ All NOT RM only

Provide assurance/ proof of delivery 23% England vs. 14% Scotland, 17% Wales, 21% Northern Ireland

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021
QC2c: You said earlier you use (insert supplier) to send parcels. Why do you choose (insert supplier)?
Base: Total not using Royal Mail only (2030), All using supplier: Hermes (901), DPD (243), Parcelforce (325)

Note: Chart is based on Total not using Royal Mail only, figures in the table are based on all using each supplier with effective base size of 100 or more

▲▼ Significantly higher or lower than Total at a 95% confidence level

▲▼ Significantly higher or lower than all other Sender types at a 95% confidence leve

Qualitative slide

Across the groups and depth interviews Royal Mail was seen in general as a trusted operator – there were few participants with many service issues

Participants on the whole suggested Royal Mail was the most trusted C2X operator: A higher level of trust in Royal Mail than in alternatives

Social senders/ casual seller participants were less likely to use competitors – Hermes occasionally

Often compared favourably with the competition by participants

Operators other than Royal Mail were seen to provide a more erratic/mixed service (often based on their experience receiving parcels)

Highly reliant on the local driver in these instances – experiences were more mixed than with Royal Mail

In some parts of the country (e.g., Highlands and Islands) participants said that using alternative courier companies came at a cost

In rural areas participants found local/familiar drivers were a real benefit

- Know where to safely leave items (sheds, garages, under hedges etc) and trusted to do so
- Know out-of-the-way houses
- One participant refuses to use COMPANY NAME for delivery because they can never find the house (down a lane) and would never consider them for sending for the same reason

Participants were less trusting of companies using multiple drivers (compared to the postman or in some instances the local Hermes driver, for example)

- Unfamiliar faces perceived to be less reliable when leaving items safely And do not know 'agreed' safe places to leave if recipient is out

For participants from the Islands, Royal Mail is also the only operator that delivers parcels regularly – often to the door

When participants had issues with Royal Mail, the process was felt to be quite long-winded (14 days till the parcel is declared lost). However, not any worse than alternative operators' customer service.

Qualitative slide

There are areas where participants indicated that competitors performed better than Royal Mail)

Size/weight: Hermes specifically could be seen as cheaper for larger/ heavier/ international parcels than Royal Mail (participants either had low awareness of Parcelforce or perceptions of expense for parcels 20kg+. Plus little awareness of Parcel Collect from home service).

One deep rural casual seller participant used other operators offering services to ship large/heavy car parts – pick up from home/work

Access: Alternative access points tended to be open longer than the sorting office, but fairly scarce in rural places

Location: Rural participants had less of a choice, but Hermes seemed to serve some deep rural locations well (without using Menzies)

Insurance: TNT and DHL were perceived by participants to be good with insurance/paying out when parcels go missing/are damaged, so used for valuable items

Flexibility: Locally known delivery staff were sometimes preferred by participants in deep rural locations as they can be more flexible than Royal Mail

- Hermes specifically can be more flexible about where items are left if the recipient is not in
- One physically impaired participant used Hermes to send/receive as they leave items on the doorstep (no trips to depot required if delivery is missed)

Some operators offer a local driver who performs a similar service to the local post person

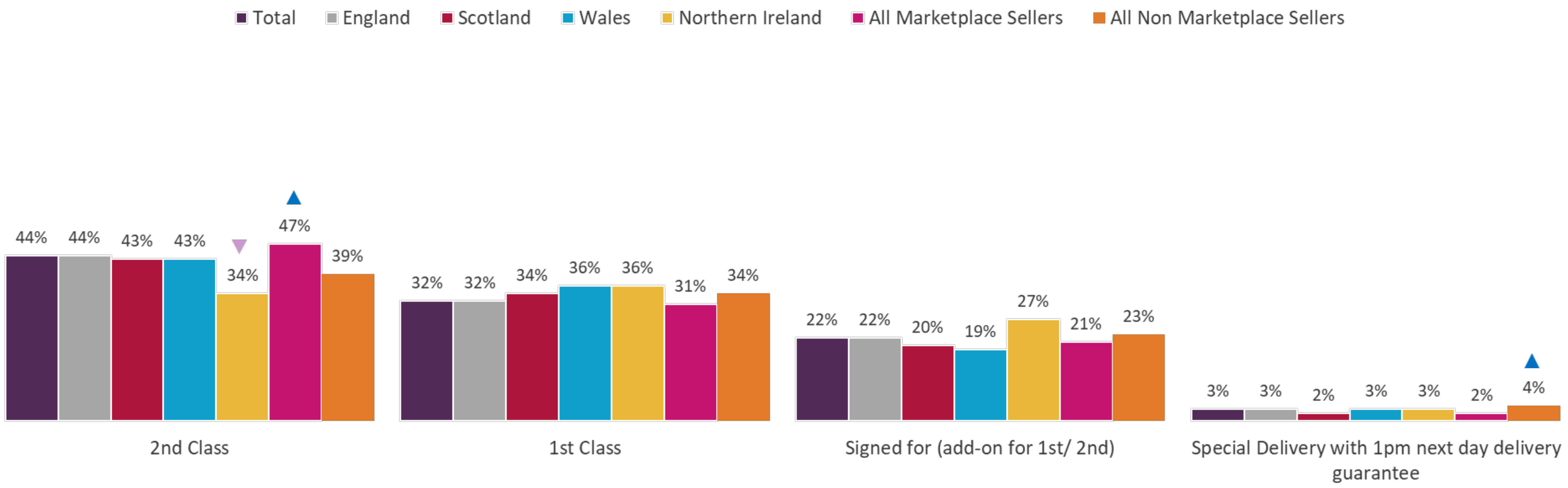
- Know where to safely leave items and find more out-of-the-way houses

6. Usage of Royal Mail services

2nd Class was the most used Royal Mail service

Sellers were significantly more likely to use 2nd Class than non-sellers

Type of Royal Mail service used most often



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QB4a/ QB4b: What types of Royal Mail service do you use?/ And which one do you use most often?

Base: All who use Royal Mail to send parcels: Total (2452), England (1152), Scotland (537), Wales (511), Northern Ireland (252), All Marketplace Sellers (1323), All Non Marketplace Sellers (1129)

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Qualitative slide

A variety of services were used by participants to send parcels – although 1st or 2nd class parcel services tended to be the default for social senders, hobby sellers and some SMEs

Large letters

Some participants who were hobby sellers or SMEs used large letters as a cheaper alternative – pack items differently to save on postage

Tracking

Where the postal service was seen as an extension of the brand/'shop front', SME participants tended to use tracking services (to match larger corporates, impress for repeat business)

Or use cheaper non-RM operator that offer tracking (Sometimes also used for big/heavy items and very few aware of the Parcel Collect service)

1st and 2nd class parcel services

Participants who were social senders and casual sellers used 1st and 2nd class for less urgent/valuable items

2nd class parcels service tended to be used by hobby sellers and SMEs – cheapest option for high volumes of parcels

Special Delivery/Signed For

Special Delivery was used for time sensitive items (e.g., medications), irreplaceable items (e.g., passport) and valuable items that require insurance

'Signed For' was used the least by participants as it falls between 1st and 2nd class and Special Delivery

Triggers to switch/stop services/ operators amongst participants:

- Poor service: reflects poorly on the brand/fear of losing customers "*I stopped using COMPANY as they were ruining my brand*"
- Costs: High volume sellers were the most cost conscious
  - Even though the costs seem small for individual parcels, they quickly mount up
  - e.g., Parcel Collect was thought to be 72p/parcel. That's £72 per 100 parcels – a substantial hole in tight margins
  - So only hobby sellers and businesses might use Parcel Collect

Small parcels were the items most frequently sent items amongst Total respondents (59%)

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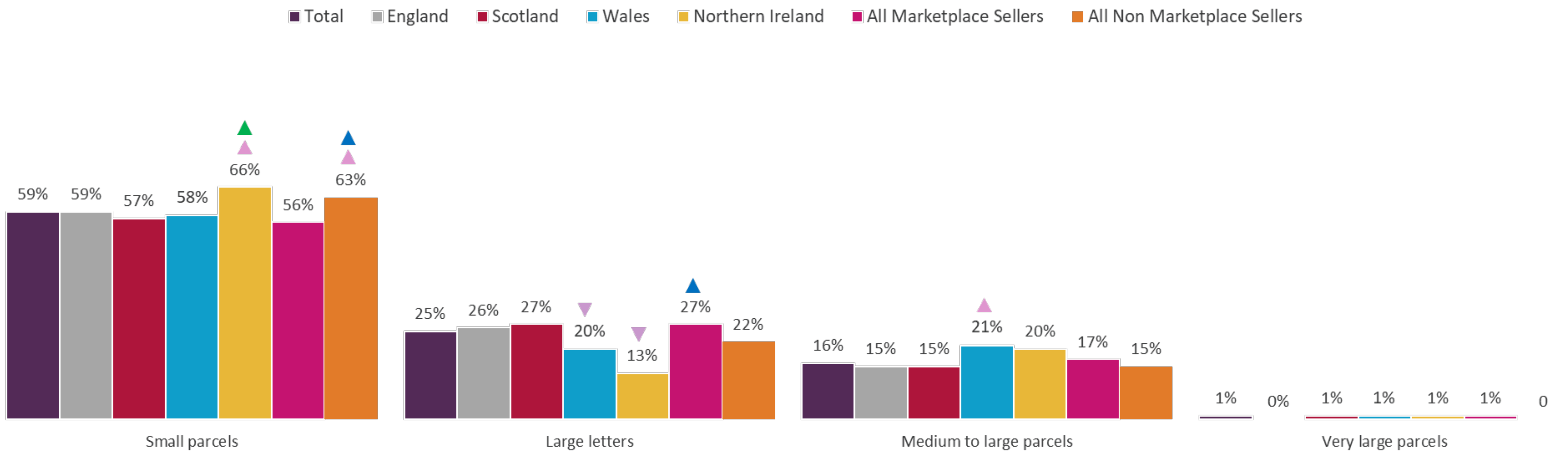
Size of parcels sent most often



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QB3/ QB3a: And thinking of your parcel sending habits more generally, what size parcels do you send? If you don't know exactly, use your best guess. And what do you send most often?

Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Qualitative slide

Some participants were unclear as to the 'right' service to use for sending their parcel

Social senders and hobby sellers sometimes were unaware of the specific features of a service and may have used services they did not 'need'

- E.g. if unsure exactly what they need to do with a parcel, some used Special Delivery simply because it sounded the most reassuring service (signed for, guaranteed delivery and insured)
- On the whole the majority were unaware of online confirmation option if looking for *proof of delivery*
- This is not because they were advised incorrectly by Post Office staff (where used), more that when presented with a myriad of options, some opted for the expensive/premium one for reassurance (rather than the specific features offered by that service)

Qualitative slide

There are areas where participants indicated that competitors performed better than Royal Mail

SOCIAL SENDERS

Online delivery Confirmation

- Few aware that it is included when sending from the Post Office
- Valued for time-sensitive items that are not urgent enough for 1pm next day delivery
- But may not fulfil the needs that social senders would use tracking for

Signed for

- Rarely used for parcels – more common for large letters
- Mostly used when sending official documents or return items

Special delivery

- Time sensitivity and insurance for high value item strongest driver for Special Delivery
- Forgotten birthday presents were the most common reason for social senders to use Special Delivery on parcels

SELLERS

Online delivery Confirmation

- None of the seller participants used it, but some welcomed the feature when they learned about it, because they get a lot of unjustified customer claims of undelivered items (mostly hobby and semi-professional sellers)
- But some uncertainty as to what it means. How much proof is it? Like Signed For?
- Less valuable for professional sellers with more structured processes for deliveries and higher volumes of parcels

Signed for

- Seen as effective protection against perceived fraud by marketplace buyers, as it provides stronger protection than online delivery confirmation (as the confirmation is tied to the recipient)
- But only used when sending a high-value item as low profit margins don't permit extra delivery costs – not something the customer requests

Special delivery

- Mostly only when requested by customers and dependent on customer willingness to pay
- For some sellers it's standard when sending a high-value product because it has insurance included

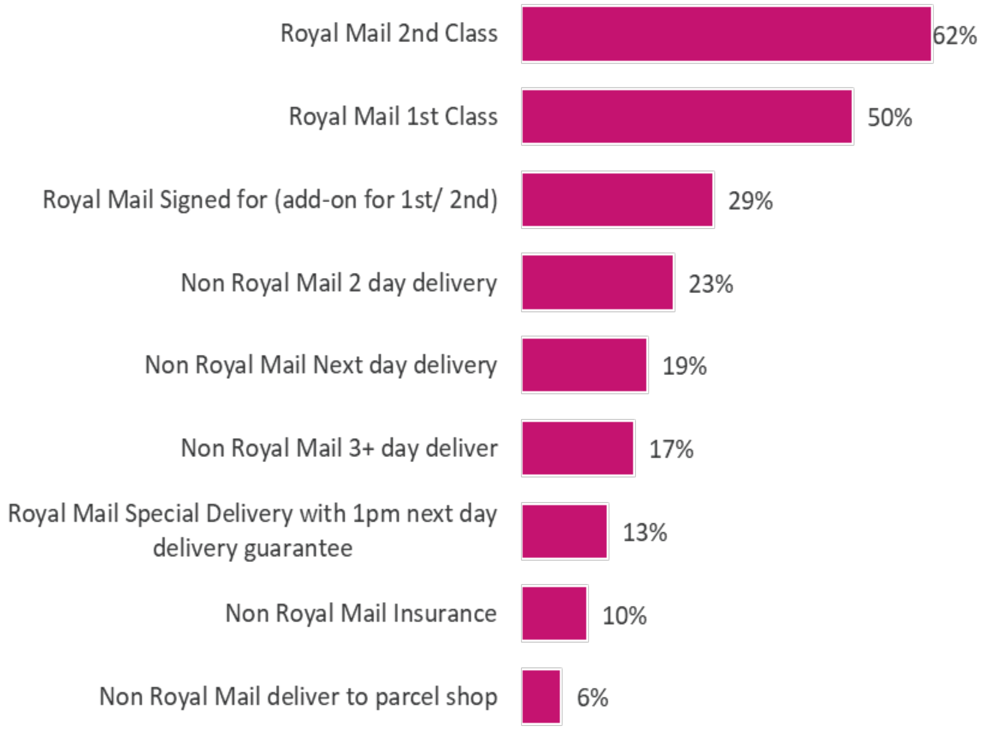
Marketplace Seller specific questions

Nearly all sellers offer at least one delivery option via Royal Mail and at least one via a non-Royal Mail supplier

Delivery options offered by Marketplace sellers

Overall indicated they:
Offer Royal Mail: 97%
Offer non-Royal Mail: 92%

Specific services (that were listed) selected as offering:



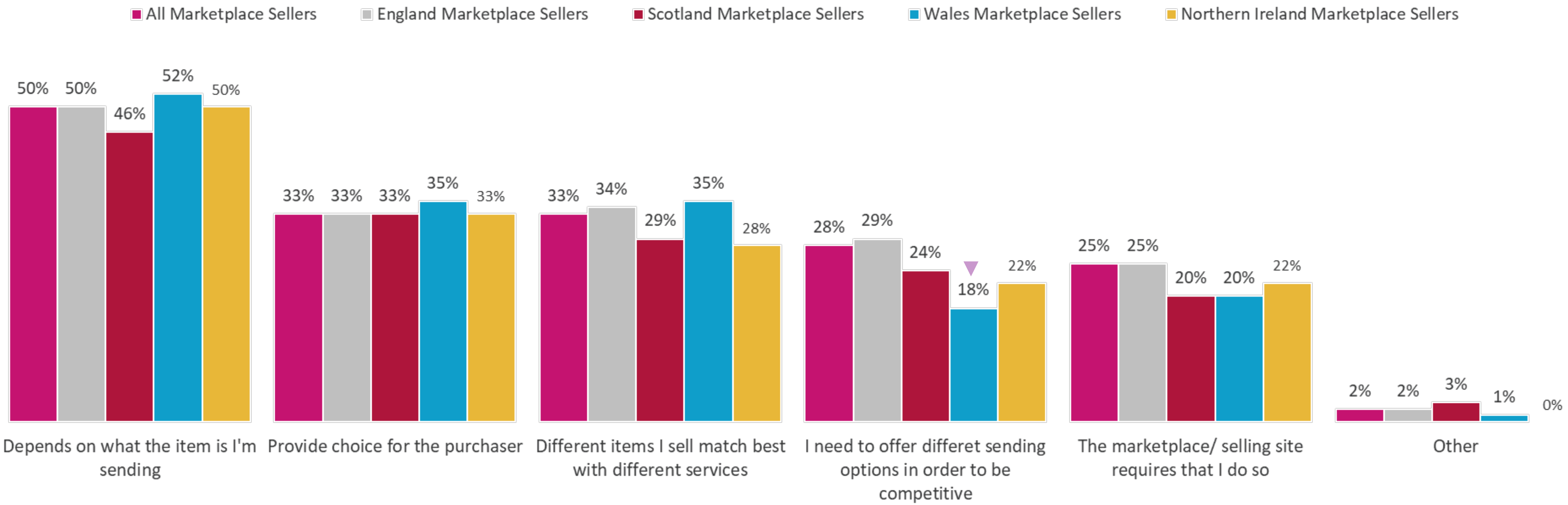
England, Marketplace Sellers	Scotland, Marketplace Sellers	Wales, Marketplace Sellers	Northern Ireland, Marketplace Sellers
63%	53% ▼	60%	63%
48%	62% ▲ ▲	53%	53%
28%	32%	32%	34%
23%	17%	21%	20%
19%	16%	17%	14%
17%	18%	18%	14%
14%	9%	12%	9%
11% ▲	7% ▼	5% ▼	4% ▼
6%	6%	8%	2%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021
QE2: Which of the following delivery options do you offer when selling online?
Base: All Marketplace Sellers: All Marketplace Sellers (1934), England Marketplace Sellers (883), Scotland Marketplace Sellers (465), Wales Marketplace Sellers (409), Northern Ireland Marketplace Sellers (177)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*
▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*
▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

'Depends on what the item is that I am sending' was the main reason selected for offering multiple sending options to customers

Reasons for Marketplace Sellers providing two or more delivery options



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE3: And what are the reasons for providing these options?

Base: All Marketplace Sellers offering 2 or more delivery options: All Marketplace Sellers(1206), England Marketplace Sellers (576), Scotland Marketplace Sellers (260), Wales Marketplace Sellers (262), Northern Ireland Marketplace Sellers (108*) *Low ESS (<100>55) **Very low ESS (45-55)

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

7. Attitudes to tracking

Qualitative slide

There was considerable confusion amongst participants around tracking and what it does

There is some confusion on what tracking does and doesn't do

- When participants used services other than 1st or 2nd class they did this to meet a range of needs, for example:
  - Getting the item to the destination faster
  - Getting the item to the destination guaranteed the next day
  - Protection against recipients who claim they didn't receive the item
  - Knowing when the item has been delivered
  - Getting an estimated delivery time window
  - Insuring an item against loss or damage
- The essence of tracking, i.e. knowing where the parcel is in the journey to its destination, **is rarely a core need in itself**
- Some struggle to unpick the different services and identify which services best meet their needs – just tend to ask for 'tracking' rather than Tracked 24/48
- **Therefore, some participants may have used services that provide tracking when their needs may have been met by an untracked product** (e.g. to see when an item has been delivered, an online delivery confirmation would be enough; to get an estimated delivery time window, it's not necessary to know at what stage the parcel is between sending and receiving)

Social senders – What 'tracking' gives them

- Some participants just wanted to make sure their item gets to the destination and tracking gives them confidence that it does.
- And they wanted assurance that when an item gets lost, they have a way to find it.

Sellers – What 'tracking' gives them

- For participants who were sellers, tracked delivery was a feature of an enhanced service, an extension of their business offering.
- This applied particularly to established SMEs and less so to hobby and semi-professional sellers.
- But for more casual sellers, tracking could be important to appear more professional to customers – and to be more competitive than other sellers
- And in some cases protection again fraudulent claims of non-delivery

Qualitative slide

Tracking was an important option for participants but not always needed when sending a parcel

When an *untracked service* meets the sender needs of participants

Most deliveries of social senders unless sender wants to have extra reassurance

Casual or semi-professional sellers who don't see themselves as a business and who only need a confirmation that their item has been delivered

When only a *tracked service* meets the sender needs of participants

Social senders

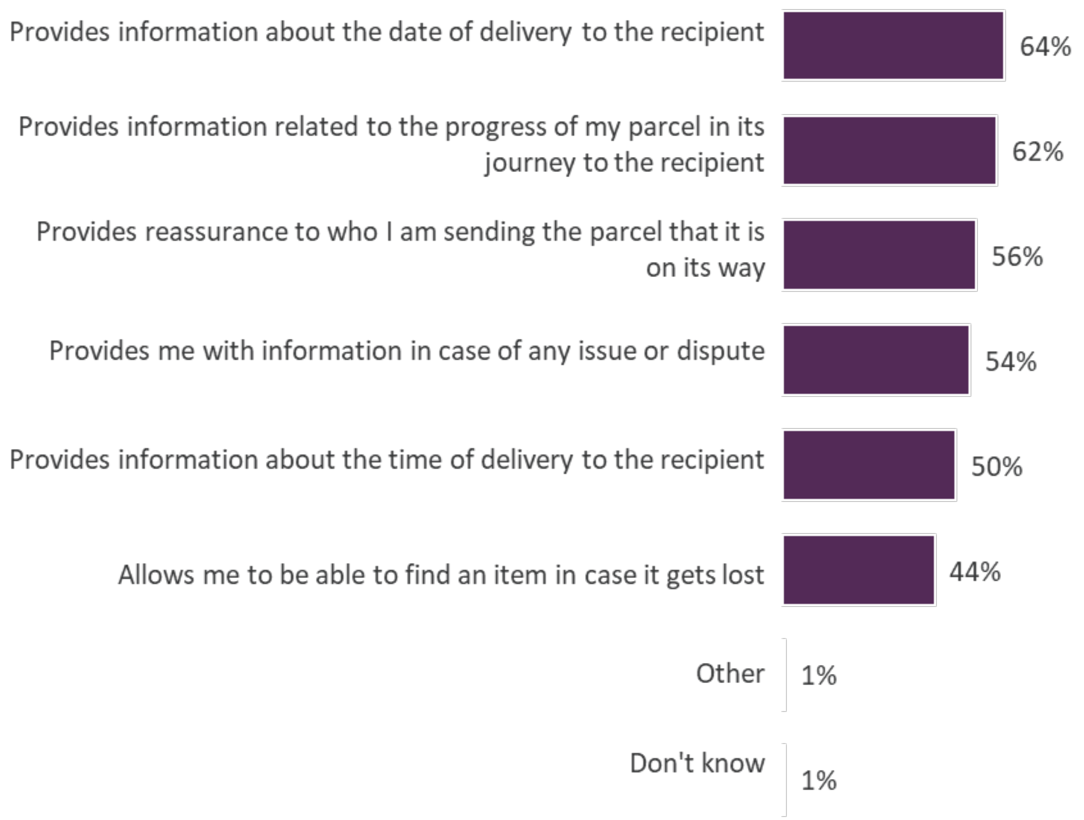
- Peace of mind when sending something time-sensitive or of high value/unique to 'follow' the parcel
- For international deliveries that are expected to take a while to arrive (and travel through numerous postal systems)
- More important when using non-Royal Mail vendors as trust levels are lower
- Tracking is also used as a first channel to look into when delivery times exceed expectations (applies to senders and receivers)

Sellers

- Tracking was not standard for all seller participants – it was about the value of the item and the degree that the seller wanted to add value to this stage of the process
- Used when selling something unique and valuable, less so for cheap and cheerful products. Or when the customer specified they wanted the item tracked (casual sellers).
- Tracking on its own is not very valuable from a seller point of view without insurance
- However, perception that customers value a tracked delivery and although these expectations are mainly of bigger businesses, some smaller marketplace sellers jump on the bandwagon

Date of delivery and information on the progress of the parcel were the two most mentioned aspects of what tracking offers the sender

Perceptions of what tracking offers a parcel sender



	England	Scotland	Wales	Northern Ireland	All Sellers	All Non Sellers
Provides information about the date of delivery to the recipient	64%	54% ▼	61%	70%	60%	71% ▲
Provides information related to the progress of my parcel in its journey to the recipient	63%	59%	56%	59%	62%	62%
Provides reassurance to who I am sending the parcel that it is on its way	56%	54%	52%	56%	55%	57%
Provides me with information in case of any issue or dispute	54%	51%	50%	62%	52%	59%
Provides information about the time of delivery to the recipient	49%	50%	50%	63%	51%	47%
Allows me to be able to find an item in case it gets lost	44%	46%	38%	42%	47% ▲	36%
Other	1%	1%	1%	0%	0%	2%
Don't know	1%	2%	0%	0%	1%	2%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QC4: You said that you selected (insert supplier) because they provide tracking. What is your perception as to what tracking offers you as a **sender**?

Base: All who use a supplier because they offer tracking: Total (645), England (311), Scotland (146), Wales (122), Northern Ireland (66**), All Marketplace Sellers (407), All Non Marketplace Sellers (238) *Low ESS (<100>55) **Very low ESS (45-55)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Nearly three-quarters agreed *'Increasingly I expect to be able to track the delivery progress of items I send'*, and *'Increasingly, people expect to be able to track the delivery progress of items they have bought from smaller online sellers'*

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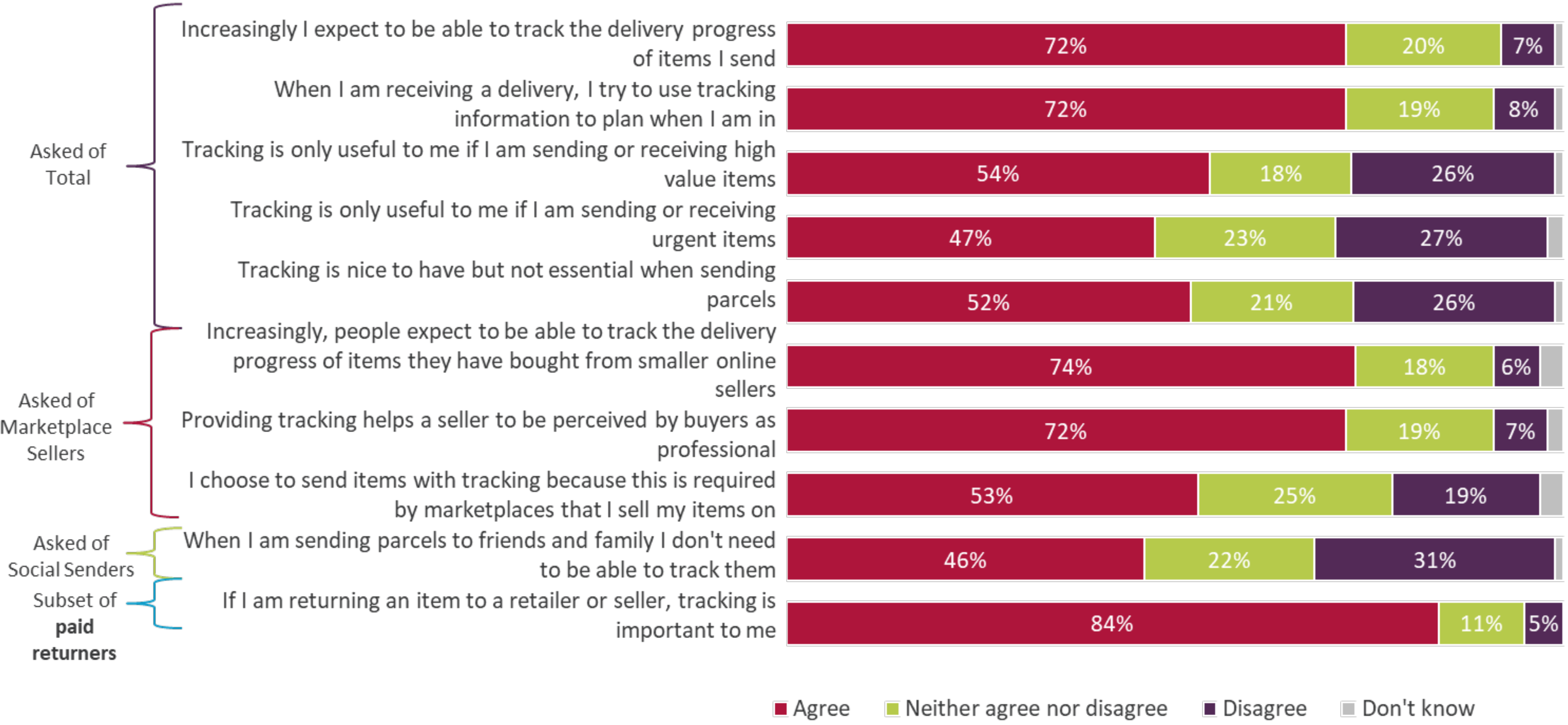
Importance of tracking – level of agreement with statements about tracking (Total)



England	Scotland	Wales	Northern Ireland
73%	70%	72%	71%
72%	72%	72%	72%
55%	50% ▼	49% ▼	48%
48% ▲	45%	41% ▼	40% ▼
53% ▲	43% ▼	44% ▼	42% ▼
74%	70%	74%	75%
72%	67%	73%	71%
54%	49%	46% ▼	46%
47%	43%	39% ▼	34% ▼
85%	78%	80%	84%

Note: Figures in the table are 'Agree' scores

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE4: Here are some statements that other people have made about tracking a parcel. How much do you agree or disagree with each one? These might be about sending parcels but also receiving parcels yourself?

Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323)

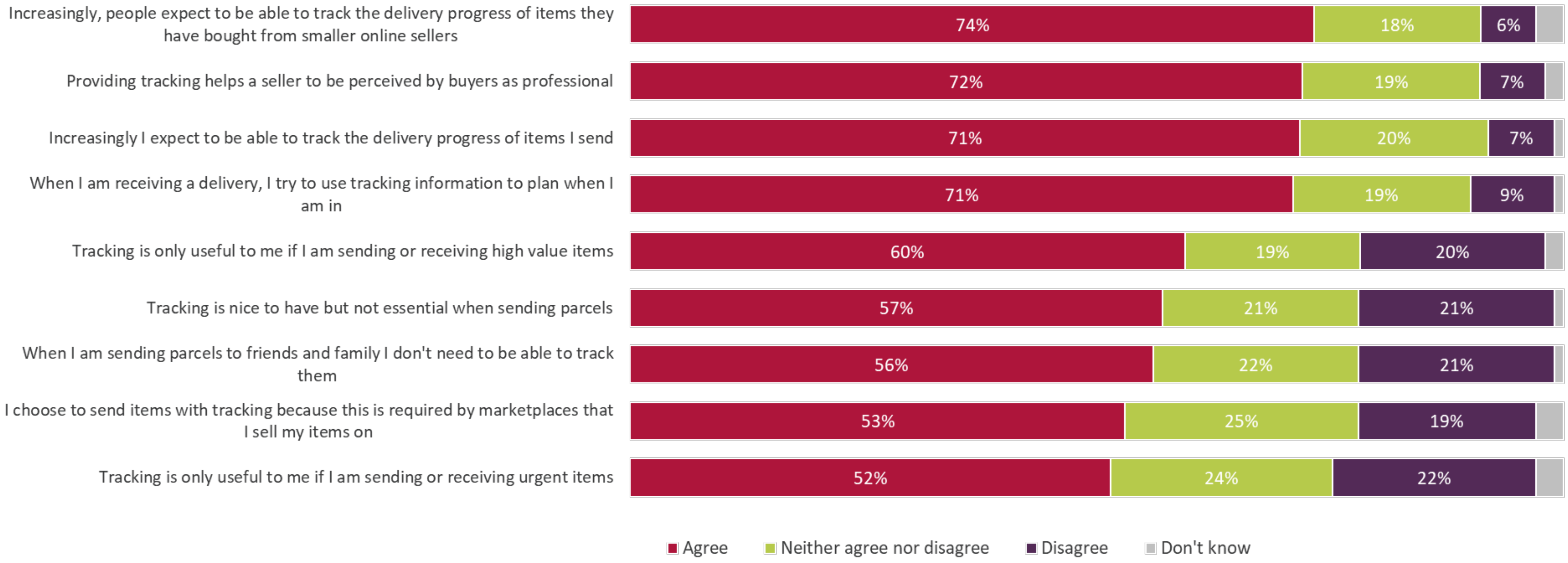
▲▼ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Around half of sellers agreed that ‘I choose to send items with tracking because this is required by marketplaces I sell my items on’

Importance of tracking – level of agreement with statements about tracking **(amongst sellers)**



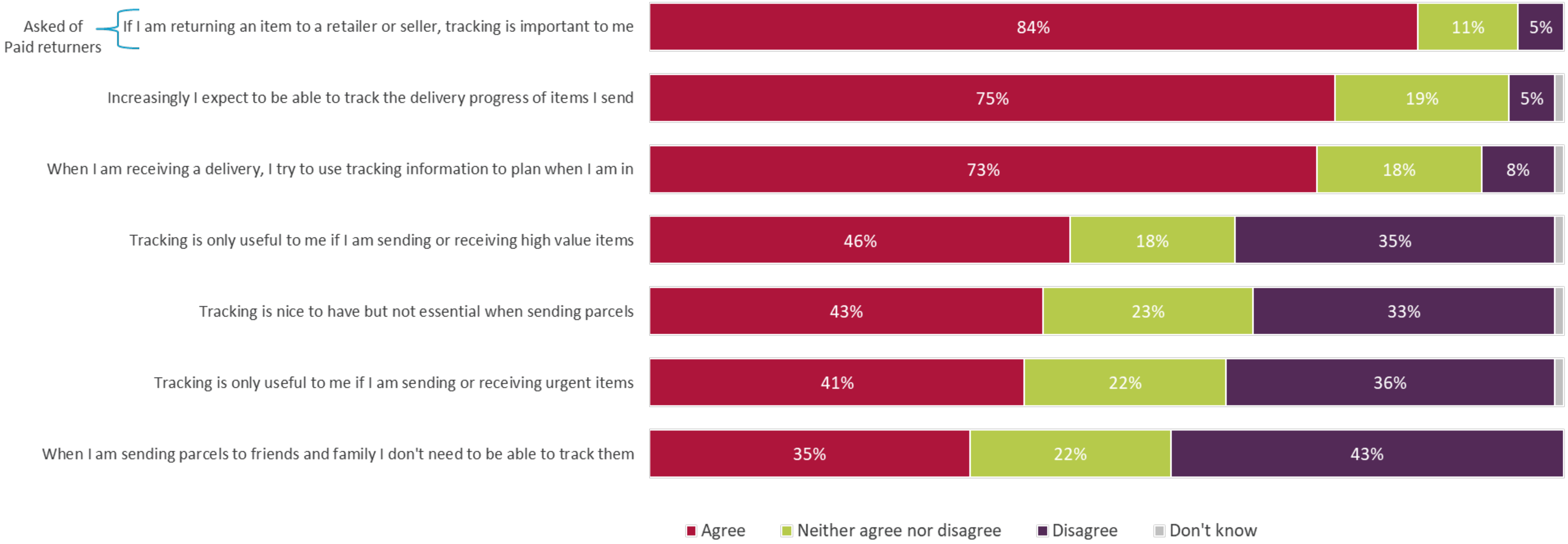
Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE4: Here are some statements that other people have made about tracking a parcel. How much do you agree or disagree with each one? These might be about sending parcels but also receiving parcels yourself?

Base: All Marketplace Sellers (1934)

Two in five (43%) non-sellers disagreed that 'when I am sending parcels to friends and family I don't need to be able to track them'

Importance of tracking – level of agreement with statements about tracking **(amongst non-sellers)**



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE4: Here are some statements that other people have made about tracking a parcel. How much do you agree or disagree with each one? These might be about sending parcels but also receiving parcels yourself?

Base: All Non Marketplace Sellers (1445)

8. Importance of tracking

Measuring importance using 'Maximum Difference Scaling' - MaxDiff

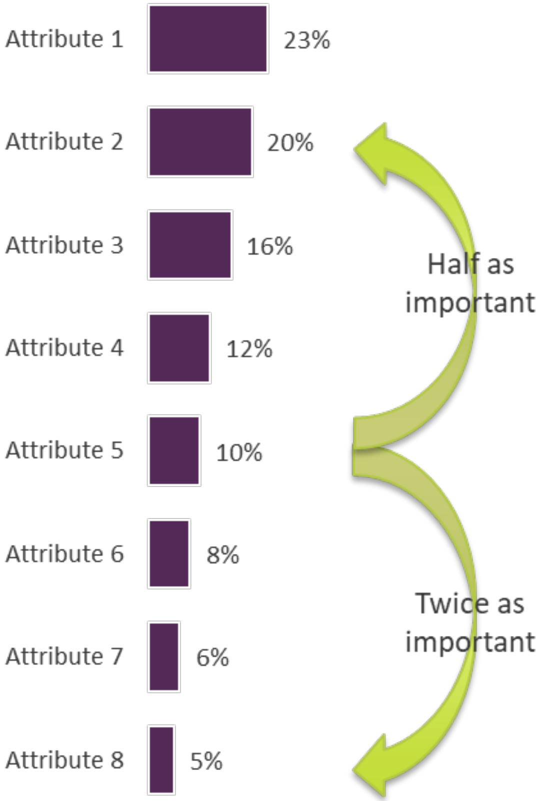
Explanation of MaxDiff approach to stated importance

The importance of different attributes/ service features when deciding how to send a parcel is derived using a stated importance methodology called Maximum Difference scaling, or MaxDiff for short. MaxDiff is a trade-off methodology in which respondents are presented with small groups of the attributes of interest and asked to indicate which is most and least important.

Across many iterations spanning all respondents, the analysis is used to generate utility scores showing the relative importance of each statement.

These scores are presented as percentages, so they sum to 100 across all attributes. An attribute with a utility score of 10%, for example, is half as important as one with a utility score of 20% and twice as important as another with a utility score of 5%.

The scores are comparing the share of importance and not comparable between groups (e.g. a 10% for marketplace sellers, is not necessarily twice as important as 5% in non-marketplace sellers).



‘Delivered with care’, ‘Proof of delivery’, ‘Lowest price’ are the three factors with the highest share of importance

Important factors when deciding how to send a parcel (MaxDiff analysis)

	Total	England	Scotland	Wales	Northern Ireland	All Sellers	All Non Sellers
Parcel delivered with care	19%	18%	21%	20%	22%	16%	23%
Proof of delivery	16%	16%	15%	16%	18%	16%	16%
Lowest price	16%	16%	13%	14%	14%	16%	16%
Tracking information on stage and day of delivery	9%	9%	9%	9%	9%	9%	9%
Reliable delivery timescales	8%	8%	8%	8%	7%	8%	8%
Guaranteed next day delivery	8%	8%	7%	7%	6%	8%	7%
Real time tracking on progress	8%	7%	8%	8%	9%	8%	7%
Good customer service	6%	6%	6%	6%	6%	6%	5%
Insurance	4%	5%	5%	4%	3%	5%	3%
Notification of expected delivery window	4%	4%	5%	4%	4%	4%	4%
Morning or afternoon delivery options	3%	3%	3%	3%	2%	4%	2%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QF1/QF2/QF3: We would like to know what factors are currently important to you when deciding how to send your parcel. We’re going to show you different sets of items. For each set, please select which is the most important and the least important to you when choosing a delivery company for **sending a parcel to a friend or relative/ sending an item that someone has bought from you online/ when returning an item to a retailer or seller?**

Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Solus Social Senders (1028), All Marketplace Sellers (1934), All Allocated Returners (417)

Important factors when deciding how to send a parcel (MaxDiff analysis) – split by value of item being sent

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Price is 3 times more important than tracking information on stage and day of delivery when the parcel contents are worth less than £5

Important factors when deciding how to send a parcel split by value of item sent	Under £5	£5 to £10	£11 to £20	£21 to £30	£31 to £40	Over £40	TOTAL
Lowest price	24%	17%	16%	14%	12%	11%	16%
Reliable delivery timescales	7%	8%	8%	7%	8%	8%	8%
Parcel delivered with care	19%	19%	20%	18%	20%	17%	19%
Good customer service	5%	6%	6%	5%	6%	6%	6%
Guaranteed next day delivery	6%	7%	6%	9%	9%	9%	8%
Insurance	3%	4%	4%	5%	6%	5%	4%
Morning or afternoon delivery options	2%	3%	3%	4%	4%	4%	3%
Proof of delivery	17%	16%	17%	16%	13%	17%	16%
Tracking information on stage and day of delivery	8%	8%	9%	9%	10%	11%	9%
Real time tracking on progress	6%	7%	7%	8%	9%	9%	8%
Notification of expected delivery window	3%	4%	4%	5%	5%	5%	4%
Base size	**409**	**682**	**827**	**541**	**304**	**616**	**3379**

Tracking information on stage and day of delivery is as importance as price when the parcel contents are worth over £40

This pattern is similar for sellers and non-sellers

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QF1/QF2/QF3: We would like to know what factors are currently important to you when deciding how to send your parcel. We're going to show you different sets of items. For each set, please select which is the most important and the least important to you when choosing a delivery company for **sending a parcel to a friend or relative/ sending an item that someone has bought from you online/ when returning an item to a retailer or seller?**

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9. Tracking and user needs

User needs questions – to understand extent to which different types of services met sender requirements

Description of how the user needs questions were asked

To ensure respondents were aware of the product features included in the services they were being asked about they were shown a list prior to the related questions.

They were then asked to use a 10-point sliding scale to indicate to what extent Royal Mail's 1st and 2nd Class services met/ would meet their requirements for sending a parcel. The scale ranged from 0 'None of the product features I require' through to 10 'All the product features I require'. Numbers on the scale were shown to respondents as they moved the marker along the scale.

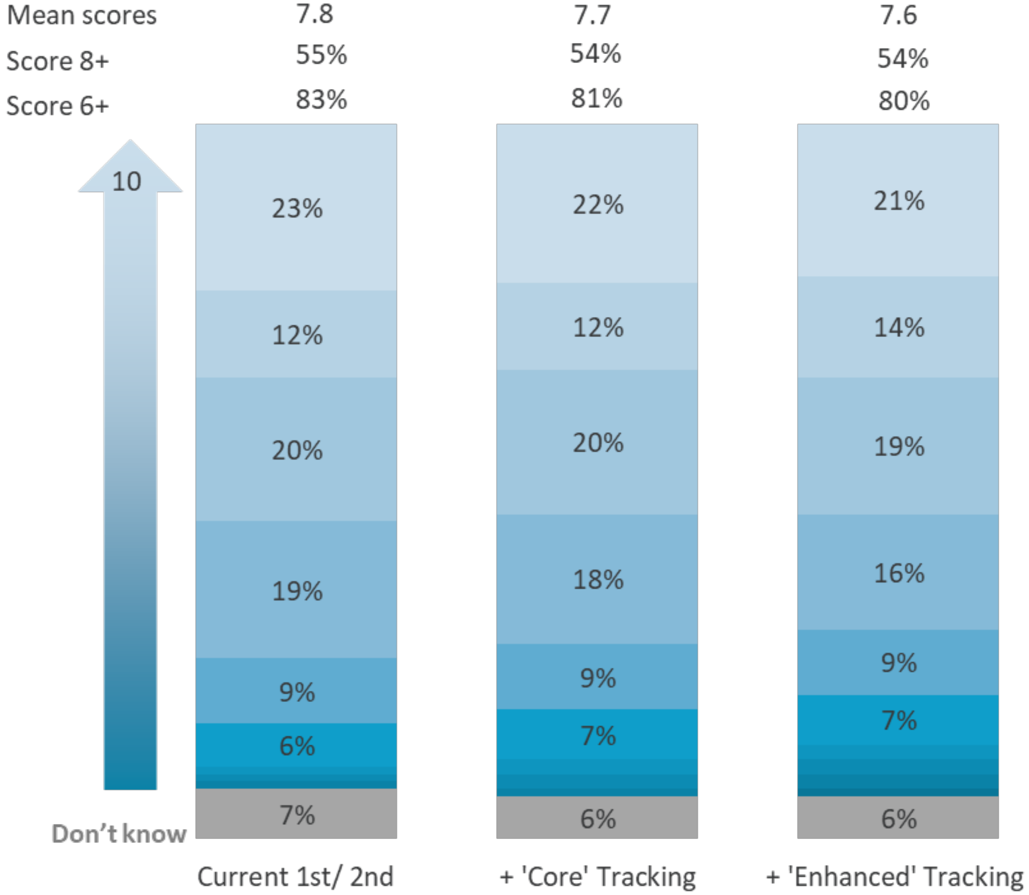
The following questions asked them to use the slider scale to indicate how the addition of 'core tracking' and then 'enhanced tracking' would meet their requirements for sending a parcel.

The process was repeated for 'other suppliers' with respondents firstly asked to what extent their current services meet their requirements for sending a parcel and, secondly, to what extent their requirements would be met if tracking was removed. Exact question text can be found on the following slides.

Note: 'core' tracking was defined as stage and day of delivery tracking, 'enhanced' tracking was defined as real time information and 2 hour delivery slot.

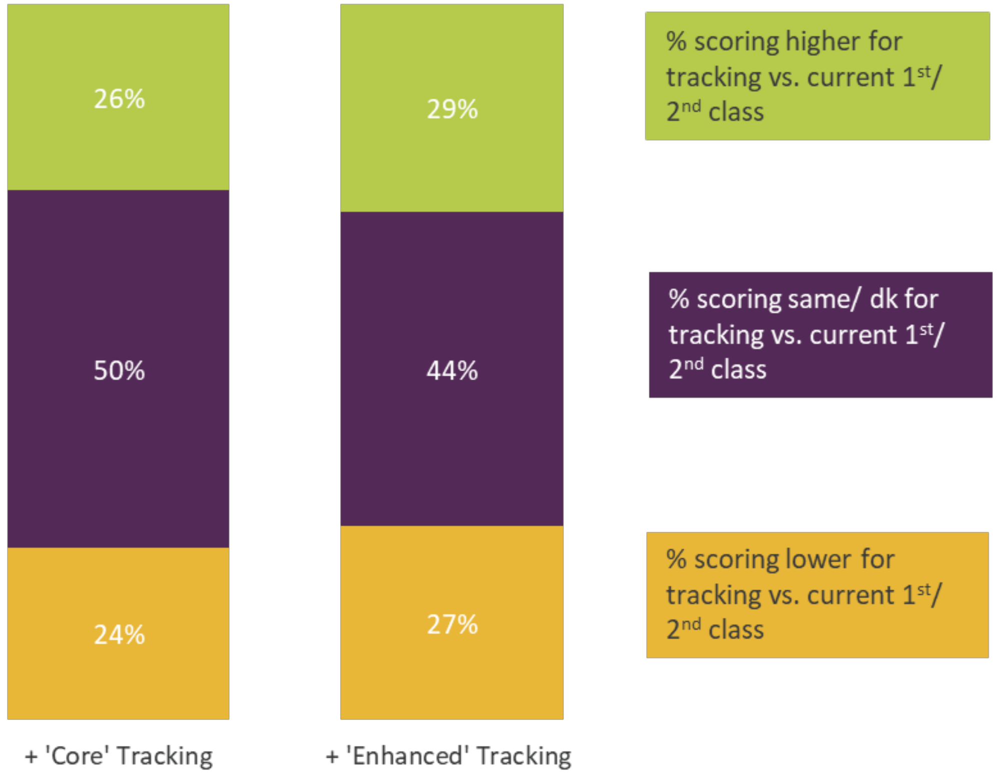
Overall mean scores in terms of the extent 1st or 2nd class services met requirements did not shift with the addition of tracking (either stage/ day and location/ slot) and over half scored 8+

Extent to which each services met/would have met user requirements when sending their last parcel



There were differing views as to whether adding tracking enhanced or detracted from the service offering. Around a quarter scored 1st/ 2nd class higher with tracking – but a similar proportion scored lower.

Direction of score for tracking options compared to current 1st/ 2nd class service



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE5b: Thinking about the last parcel you sent, to what extent did/ would Royal Mail's 1st and 2nd Class services meet requirements you had for sending that parcel? Please use the sliding scale below to answer. (Respondents answer on a scale of 0-10, with 0 being 'None of the product features I require' and 10 'being 'All of the product features I require')

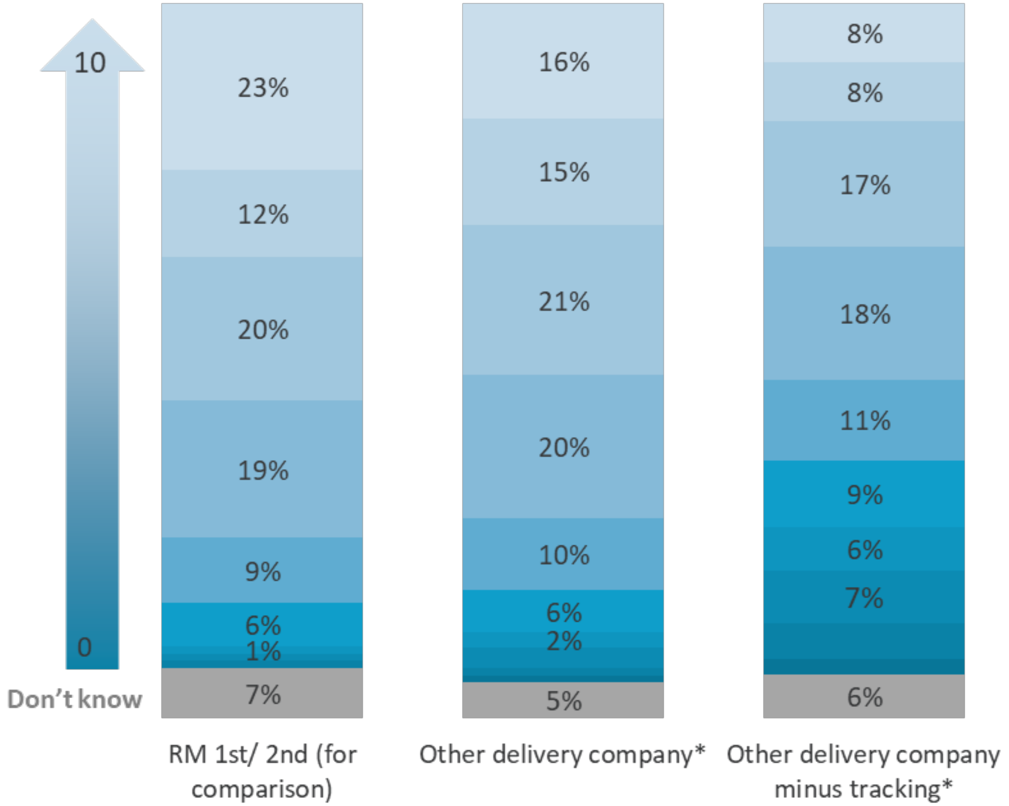
Base: Total (3379) **NB: 'core' tracking was defined as stage and day of delivery tracking, 'enhanced' tracking was defined as real time information and 2 hour delivery slot.**

For non-RM service users, tracking appears to be more important in meeting requirements

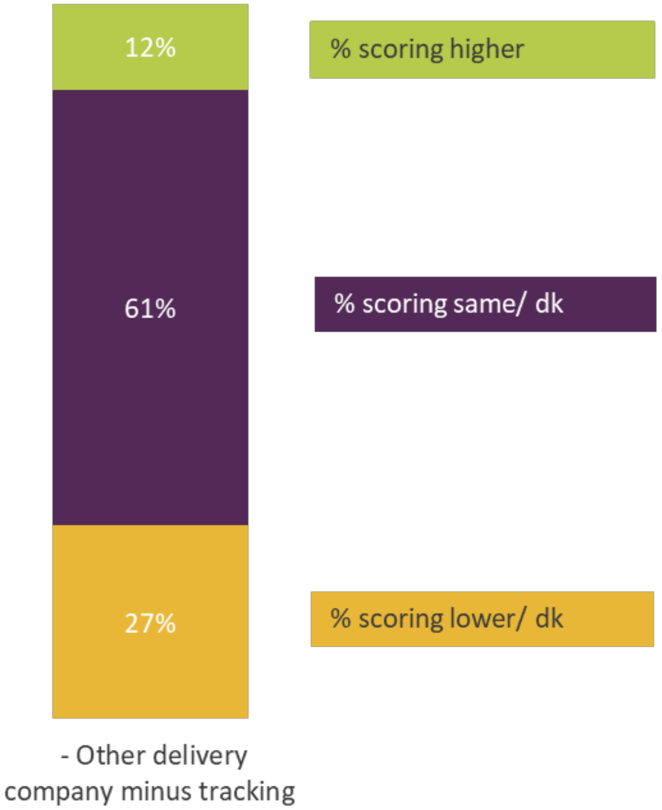
The score for the extent non-Royal Mail services met requirements when tracking was removed was lower

Extent to which each services met/would have met requirements when sending their last parcel

	RM 1st/ 2nd (for comparison)	Other delivery company*	Other delivery company minus tracking*
Mean scores	7.8	7.5	6.1
Score 8+	55%	52%	33%
Score 6+	83%	83%	62%



Direction of score for other delivery companies minus tracking



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE5b: Thinking about the last parcel you sent, to what extent did/ would Royal Mail's 1st and 2nd Class services meet requirements you had for sending that parcel?

QE5d : And now thinking about services offered by delivery companies other than Royal Mail. To what extent would these services meet the requirements you had when sending your last parcel?

QE5di This time, again thinking about services offered by delivery companies other than Royal Mail, to what extent would these services meet the requirements you had when sending your last parcel……if the service they offered DID NOT include tracking. Base: Total: 3379 , *All who use delivery companies other than Royal Mail: 2030

Extent to which Royal Mail's 1st and 2nd Class services met/would have met user requirements when sending their last parcel

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE5b: Thinking about the last parcel you sent, to what extent did/ would Royal Mail's 1st and 2nd Class services meet requirements you had for sending that parcel? Please use the sliding scale below to answer. (Respondents answer on a scale of 0-10, with 0 being 'None of the product features I require' and 10 'being 'All of the product features I require')

Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Extent to which Royal Mail's 1st and 2nd Class services, **with stage and day tracking* added**, met/would have met user requirements when sending their last parcel

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE5c: Imagine tracking was added to Royal Mail's 1st Class and 2nd Class services *so that you and/ or the recipient could see at what **stage** on its journey the parcel is, and on what **day** it is expected to be delivered. To what extent would these services meet the requirements you had when sending your last parcel? Please use the sliding scale below to answer.
(Respondents answer on a scale of 0-10, with 0 being 'None of the product features I require' and 10 'being 'All of the product features I require')

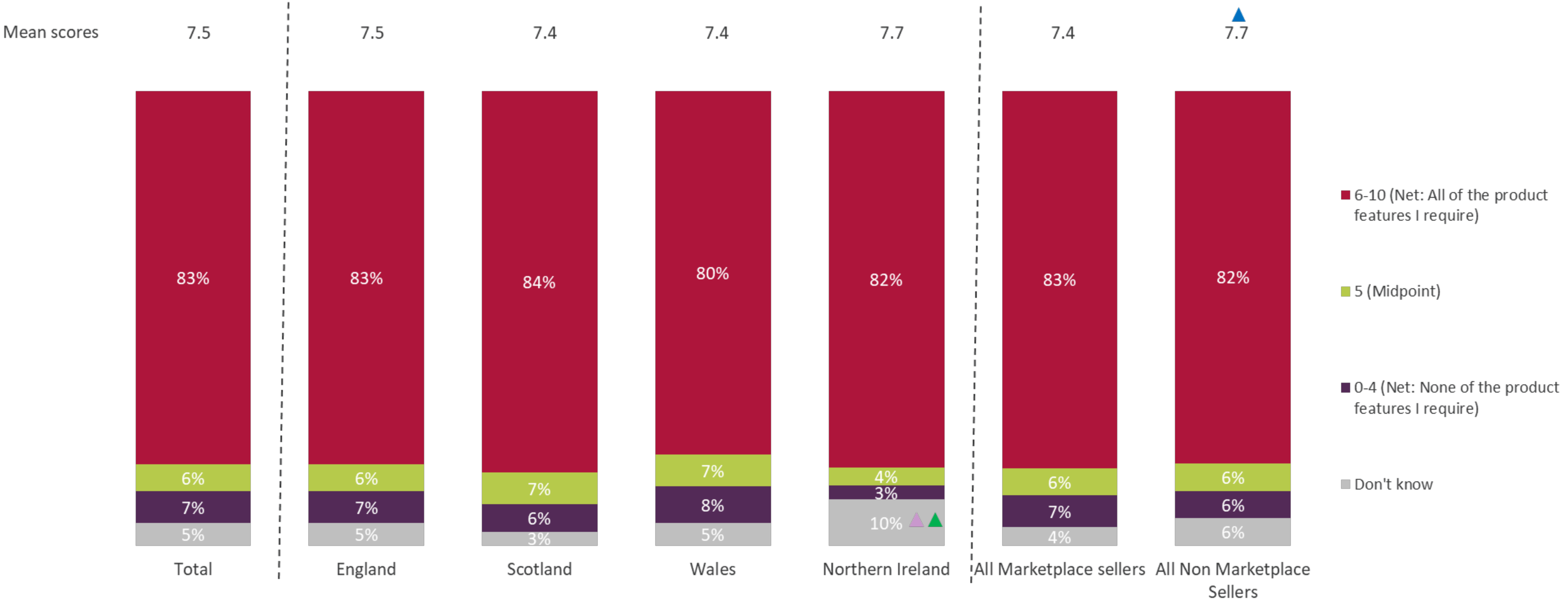
Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Extent to which services offered by non Royal Mail suppliers met/would have met user requirements when sending their last parcel



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QE5d: And now thinking about services offered by delivery companies other than Royal Mail. To what extent would these services meet the requirements you had for sending your last parcel? Please use the sliding scale below to answer. (Respondents answer on a scale of 0-10, with 0 being 'None of the product features I require' and 10 'being 'All of the product features I require')

Base: All who use named suppliers other than Royal Mail: Total (2030), England (948), Scotland (485), Wales (419), Northern Ireland (178), All Marketplace Sellers (1365), All Non

Significantly higher or lower than Total at a 95% confidence level

Significantly higher or lower than all other Nations at a 95% confidence level

Significantly higher or lower than all other Sender types at a 95% confidence level

Qualitative slide

Elements that participants identified as 'good tracking'

- Easy to use – i.e. only 1-3 clicks away
  - Sellers often pass tracking details to buyer so they can track the parcel – needs to be easy to use for the buyer (key part of customer experience)
- With exact time stamps at each stage – i.e., day times, not days
- Regularly updated – ideally also whether the item is 'on track' of its initial delivery timeline

Particularly for recipients

- A customer-friendly time slot (i.e., not 8 hours!) for delivery
  - Includes the final mile – e.g. map with stop-by-stop updates
  - Informing customers if estimated arrival time is delayed

Qualitative slide

Comparison of participants views of two-point tracking vs full tracking

2-POINT TRACKING

View as a sender

- Provides peace of mind for urgent/high-value deliveries
- Sign of professionalism (sellers)

View as a recipient

- Receive an estimated delivery time
- Reassurance that an item has been dispatched

Stage and day tracking:

- *More useful for hobby and SME sellers than for social senders*
- *For recipients only useful if updated - delivery time estimates not needed*

FULL TRACKING

View a sender

- In case things go wrong: Can track down items faster and become more responsive to their customer inquiries (sellers)
- Can give buyers good customer journey
- Useful for international deliveries

View as a recipient

- Can track the final mile (> more accurate delivery time estimate)
- Useful for international deliveries

Location and slot tracking:

- *More useful for sellers who want to optimise the customer journey by ensuring good service while the item is on its way*
- *Liked by most recipients who shop online regularly*

10. Willingness to pay for tracking

Qualitative slide

On the whole, participants were not positive about raising standard postage costs to include tracking, although there were some exceptions

Participants' perceptions of costs

- Most participants did not know the cost of tracking
- Perception that tracking is not difficult to execute because everything has a barcode so the cost should be low
- Perception compounded by the fact that many low-cost operators include tracking as standard.
- When pressed to say how much they'd pay to have tracking:
  - Social Senders - £0.75 - £1 for low-value items and £1-2 for higher value items
  - Sellers – 20-30p for low value add, £1 for higher value. But highly dependent on volume.

How participants felt Royal Mail compares

- Some saw the non-inclusion of tracking in Royal Mail as a sign of complacency
- Royal Mail was seen by some participants to be more expensive than other operators while offering lower service levels
- The current cost of Royal Mail's tracking services often rule it out with sellers, who do want to offer tracking to their customers but operate on slim margins

Including tracking in 1st and 2nd class service

- Participants who were social senders and sellers reacted negatively to the idea of increasing standard parcel postage costs to include tracking
- Social senders don't use it enough to justify increased costs on all parcel postage
- Sellers in crowded marketplaces don't want to increase their delivery costs or reduce their margins
- However – there is some support for the idea of including tracking in the 1st class service and increasing the postage costs accordingly

Willingness to pay for tracking

Explanation of Willingness to pay for tracking analysis

Respondents were asked likelihood of purchasing two potential Royal Mail tracking options at 5 price points. The responses they provide allow us to model how uptake would change as prices increase for both options. Prices were presented as additional on top of current postage price.

A 5-point likelihood scale was used:

1. Will definitely buy
2. Will probably buy
3. Will possibly buy
4. Will probably not buy
5. Will definitely not buy

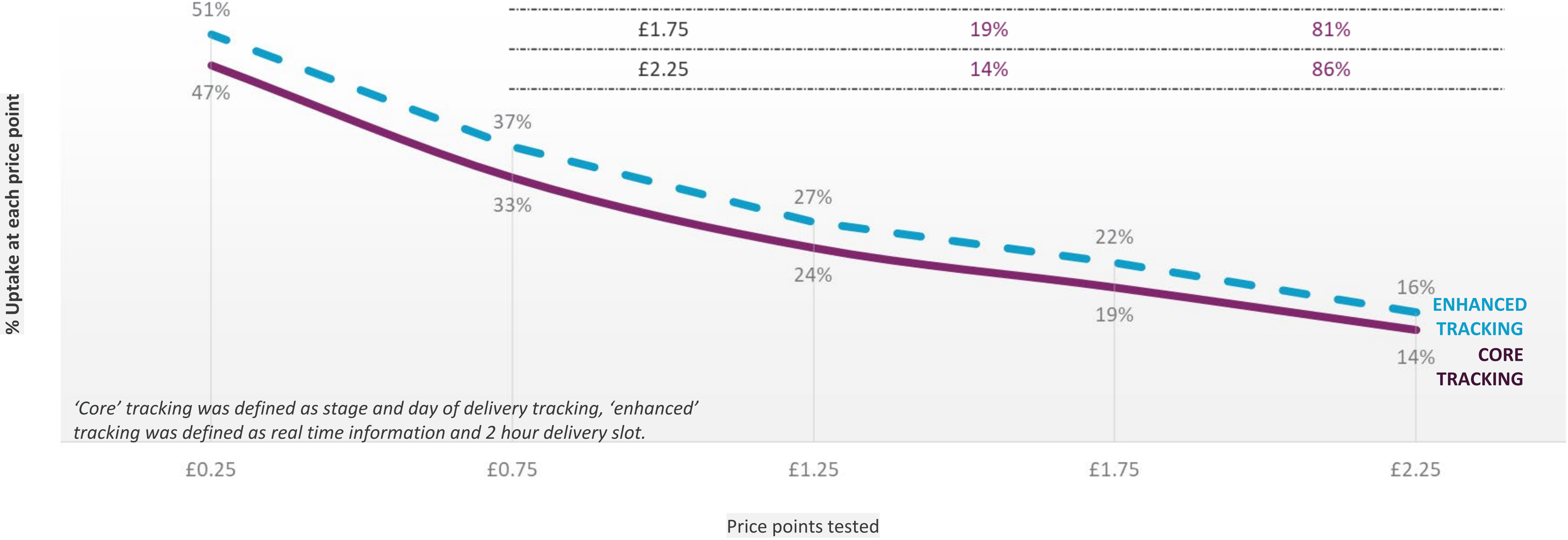
The uptake we present in the following charts is based on weighted responses allowing us to compensate for overstatement. The figure comprises 70% of those who say they definitely would, 30% who say they probably would and 10% of those who say they possibly would.

As an illustration, taking the core tracking at 25p for the overall sample 56% said definitely will, 21% probably will, 16% possibly will, 4% probably not and 3% definitely not buy. Therefore, the uptake is 47% = (56% x 70%) + (21% x 30%) + (16% x 10%).

Around half would be willing to pay 25p for tracking. A fifth would be willing to pay £1.75

Gabor Granger overall analysis

Price point tested	% uptake for core tracking	% no uptake
25p	**47%**	**53%**
75p	33%	67%
£1.25	24%	76%
£1.75	19%	81%
£2.25	14%	86%



'Core' tracking was defined as stage and day of delivery tracking, 'enhanced' tracking was defined as real time information and 2 hour delivery slot.

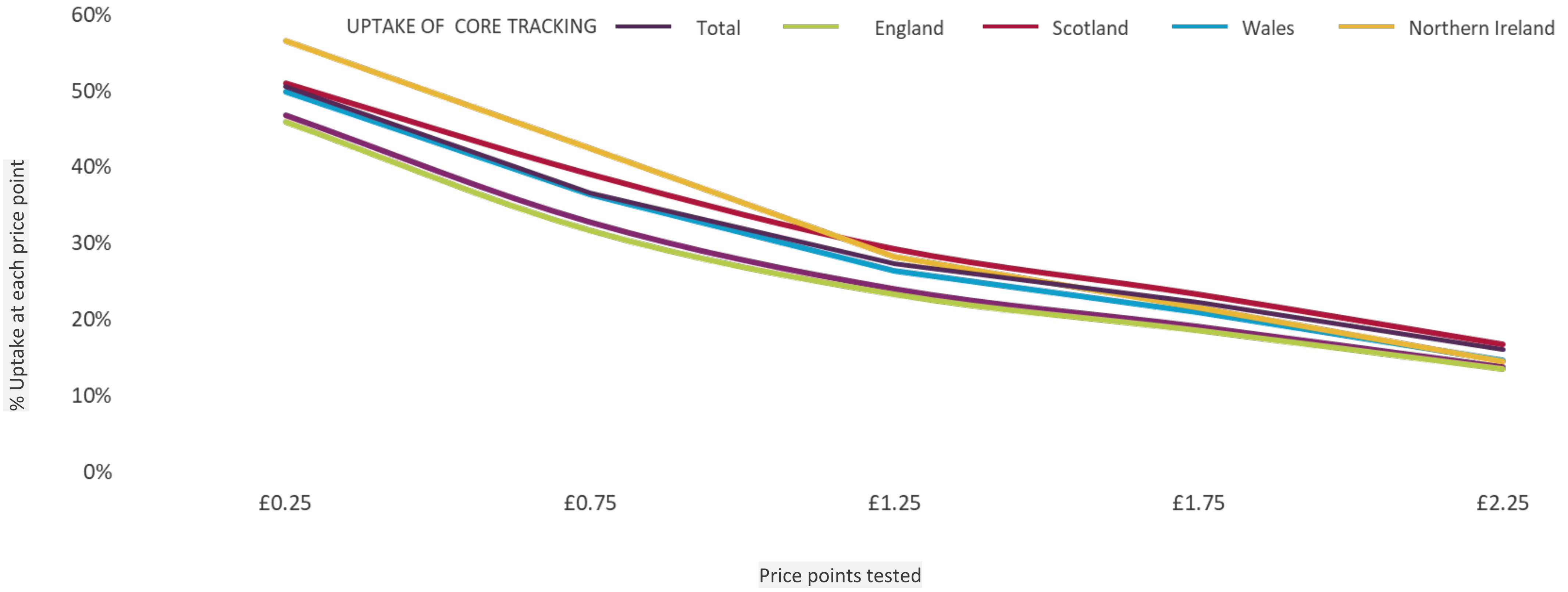
Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Q15: We would like you to think about using a tracking service when sending a parcel. So, thinking abut the last you sent a parcel (insert wording depending on sender type) using Royal Mail's 1st or 2nd Class postage. This service does not currently allow you to track a parcel. If you were sending a similar package again which allowed you to add on tracking how likely would you be to pay for tracking if the cost were as follows?/ Q15b: This time the additional tracking service offered by Royal Mail gave you and/ or the recipient access to real time updates about exactly where the parcel is on its journey, and you were notified of the specific expected delivery e.g. two hour time slots). How likely would you be to pay for that tracking service if the cost were as follows? Base: All using Royal Mail in the last 12 months: Total (2912), England (1347), Scotland (689), Wales (586), Northern Ireland (290)

Uptake of core tracking options vary slightly by Nation at the lower price points but converge as price tested increases

Gabor Granger by nation (all using Royal Mail in the last 12 months)

'Core' tracking was defined as stage and day of delivery tracking.



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

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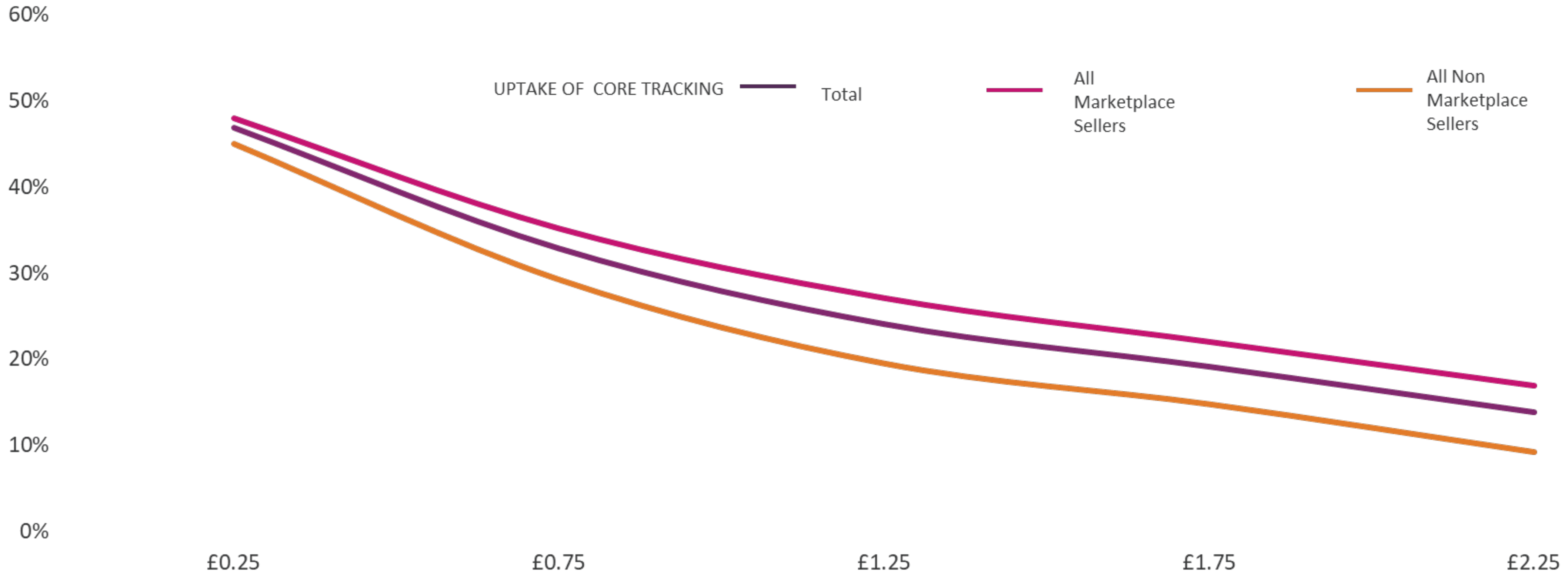
Sellers are more likely than non-sellers to take up tracking

This applies across all price points

Gabor Granger by sender type (all using Royal Mail in the last 12 months)



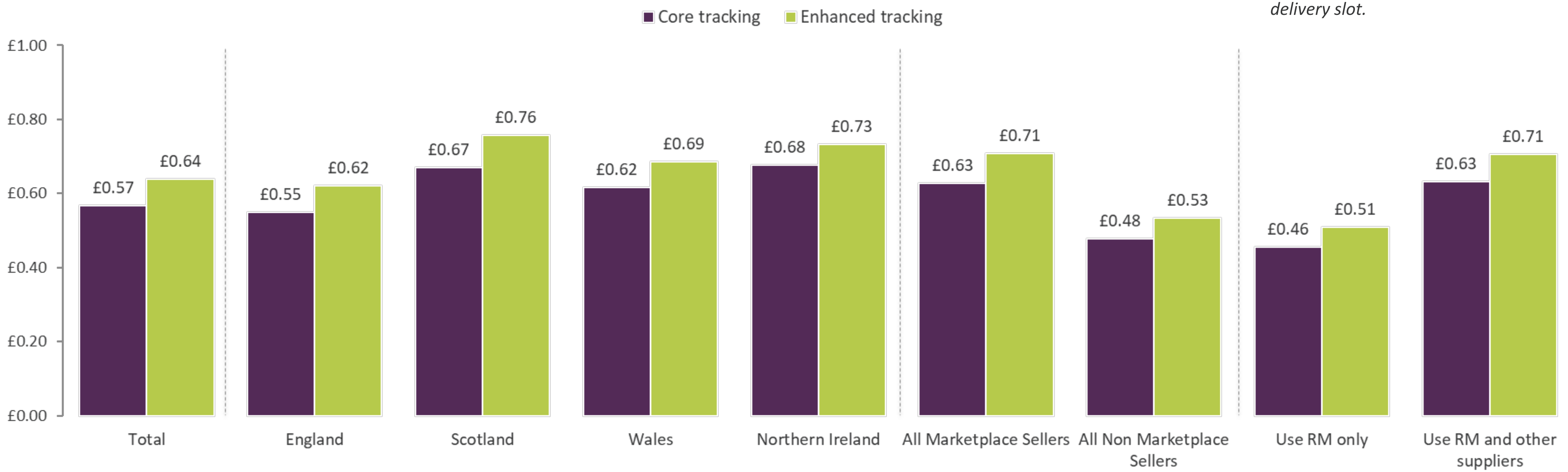
Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Q15: We would like you to think about using a tracking service when sending a parcel. So, thinking abut the last you sent a parcel (insert wording depending on sender type) using Royal mail's 1st or 2nd Class postage. This service does not currently allow you to track a parcel. If you were sending a similar package again which allowed you to add on tracking how likely would you be to pay for tracking if the cost were as follows?/ Q15b: This time the additional tracking service offered by Royal mail gave you and/ or the recipient access to real time updates about exactly where the parcel is on its journey, and you were notified of the specific expected delivery e.g. two hour time slots). How likely would you be to pay for that tracking service if the cost were as follows? Base: All using Royal Mail in the last 12 months: Total (2912), All Marketplace Sellers (1640), All Non Marketplace Sellers (1272)

Sellers had a higher average weighted willingness to pay for both types of tracking vs. non-sellers

Average weighted willingness to pay for core and enhanced tracking – split by subgroups

'Core' tracking was defined as stage and day of delivery tracking, 'enhanced' tracking was defined as real time information and 2 hour delivery slot.



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

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‘Microbusiness’ sellers were the most likely to place higher values on tracking

Willingness to pay for core and enhanced tracking – split by subgroups

Price point	Total uptake of core tracking	Non-seller uptake of core tracking	Seller uptake of core tracking	Casual seller only	Hobby seller	Microbusiness sellers
£2.25	14%	9%	17%	16%	14%	22%
£1.75	19%	15%	22%	22%	18%	27%
£1.25	24%	20%	27%	27%	22%	33%
£0.75	33%	29%	35%	35%	32%	39%
£0.25	47%	45%	48%	49%	44%	49%

Price point	Total uptake of enhanced tracking	Non-seller uptake of enhanced tracking	Seller uptake of enhanced tracking	Casual seller only	Hobby seller	Microbusiness/ SMEs - marketplace
£2.25	16%	11%	20%	18%	17%	28%
£1.75	22%	17%	26%	25%	21%	34%
£1.25	27%	22%	31%	30%	25%	39%
£0.75	37%	33%	39%	38%	37%	44%
£0.25	51%	49%	52%	53%	48%	54%

‘Core’ tracking was defined as stage and day of delivery tracking, ‘enhanced’ tracking was defined as real time information and 2 hour delivery slot.

Statistically significantly higher than the total at 95% confidence level

Statistically significantly lower than the total at 95% confidence level

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Q15: We would like you to think about using a tracking service when sending a parcel. So, thinking abut the last you sent a parcel (insert wording depending on sender type) using Royal Mail’s 1st or 2nd Class postage. This service does not currently allow you to track a parcel. If you were sending a similar package again which allowed you to add on tracking how likely would you be to pay for tracking if the cost were as follows?/ Q15b: This time the additional tracking service offered by Royal Mail gave you and/ or the recipient access to real time updates about exactly where the parcel is on its journey, and you were notified of the specific expected delivery e.g. two hour time slots). How likely would you be to pay for that tracking service if the cost were as follows? Base: All using Royal Mail in the last 12 months: Total (2912), England (1347), Scotland (689), Wales (586), Northern Ireland (290)

Willingness to pay for those sending higher value packages was higher – particularly for sellers

Willingness to pay for core tracking split by value of package used as context for Garbor Granger questions

Price point	Under £5	£5 to £10	£11 to £20	£21 to £30	£31 to £40	Over £40	TOTAL
£2.25	9%	12%	11%	14%	15%	24%	14%
£1.75	13%	17%	16%	20%	21%	30%	19%
£1.25	16%	21%	21%	26%	27%	36%	24%
£0.75	25%	29%	30%	35%	37%	44%	33%
£0.25	40%	44%	47%	48%	49%	53%	47%
Overall average STP	**£0.41**	**£0.50**	**£0.51**	**£0.59**	**£0.62**	**£0.79**	**£0.57**
Non-seller average STP	**£0.35**	**£0.48**	**£0.44**	**£0.46**	**£0.58**	**£0.62**	**£0.48**
Seller average STP	**£0.47**	**£0.51**	**£0.56**	**£0.67**	**£0.65**	**£0.88**	**£0.63**

Statistically significantly higher than the total at 95% confidence level

Statistically significantly lower than the total at 95% confidence level

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Q15: We would like you to think about using a tracking service when sending a parcel. So, thinking abut the last you sent a parcel (insert wording depending on sender type) using Royal Mail's 1st or 2nd Class postage. This service does not currently allow you to track a parcel. If you were sending a similar package again which allowed you to add on tracking how likely would you be to pay for tracking if the cost were as follows?/ Q15b: This time the additional tracking service offered by Royal Mail gave you and/ or the recipient access to real time updates about exactly where the parcel is on its journey, and you were notified of the specific expected delivery e.g. two hour time slots). How likely would you be to pay for that tracking service if the cost were as follows? Base: All using Royal Mail in the last 12 months: Total (2912), England (1347), Scotland (689), Wales (586), Northern Ireland (290)

Sellers were more likely to place financial value on tracking – particularly when sending a high value item – 28% would pay £2.25 for an item over £40 versus 14% of non-sellers

Willingness to pay for core tracking split by value of package used as context for Garbor Granger questions

Non-seller

Price point	Under £5	£5 to £10	£11 to £20	£21 to £30	£31 to £40	Over £40
£2.25	6%	11%	8%	8%	10%	14%
£1.75	10%	16%	13%	13%	19%	20%
£1.25	14%	20%	18%	18%	25%	28%
£0.75	23%	28%	27%	30%	37%	38%
£0.25	37%	44%	45%	47%	53%	50%
Non-seller average STP	**£0.35**	**£0.48**	**£0.44**	**£0.46**	**£0.58**	**£0.62**

Seller

Price point	Under £5	£5 to £10	£11 to £20	£21 to £30	£31 to £40	Over £40
£2.25	12%	13%	13%	17%	19%	28%
£1.75	15%	17%	18%	24%	22%	34%
£1.25	18%	22%	23%	30%	28%	40%
£0.75	26%	29%	33%	38%	36%	47%
£0.25	43%	44%	49%	49%	46%	54%
Seller average STP	**£0.47**	**£0.51**	**£0.56**	**£0.67**	**£0.65**	**£0.88**

Statistically significantly lower than the total at 95% confidence level

Statistically significantly higher than the total at 95% confidence level

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Q15: We would like you to think about using a tracking service when sending a parcel. So, thinking abut the last you sent a parcel (insert wording depending on sender type) using Royal mail's 1st or 2nd Class postage. This service does not currently allow you to track a parcel. If you were sending a similar package again which allowed you to add on tracking how likely would you be to pay for tracking if the cost were as follows?/ Q15b: This time the additional tracking service offered by Royal mail gave you and/ or the recipient access to real time updates about exactly where the parcel is on its journey, and you were notified of the specific expected delivery e.g. two hour time slots). How likely would you be to pay for that tracking service if the cost were as follows? Base: All using Royal Mail in the last 12 months: Total (2912), England (1347), Scotland (689), Wales (586), Northern Ireland (290)

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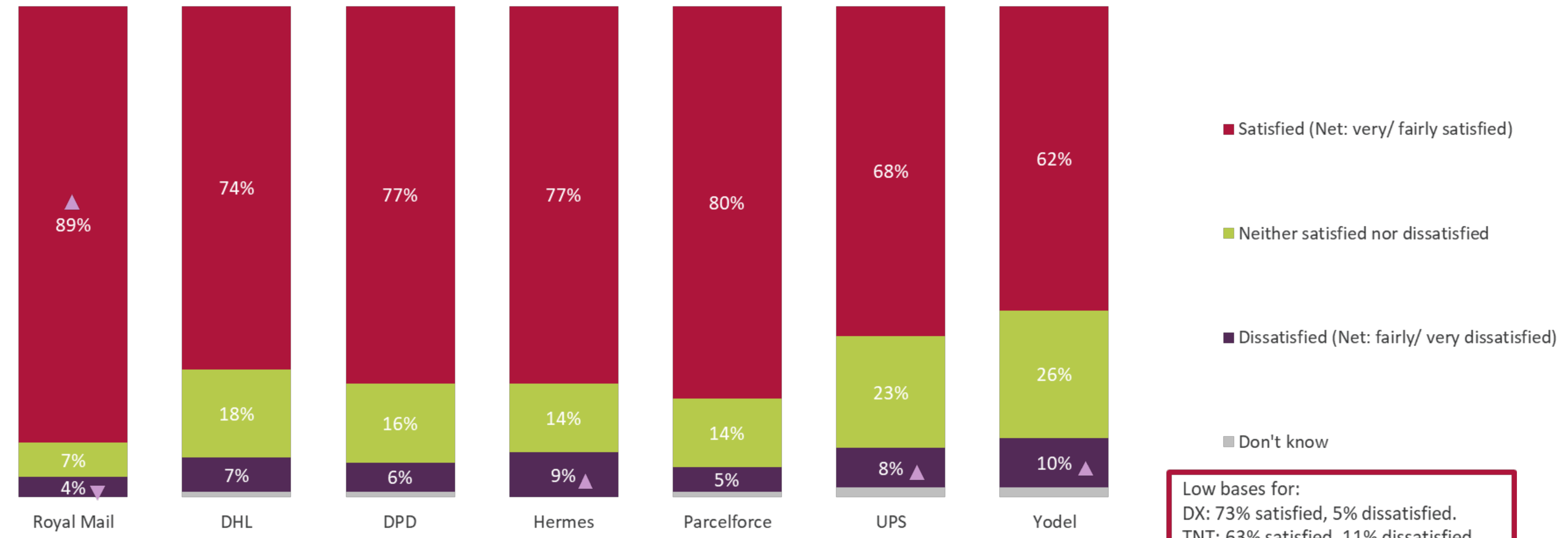
11. Satisfaction and experience of detriment

A large majority of those using Royal Mail are satisfied with the service they receive – and at almost 9 in 10 the proportion is higher than for other suppliers

Satisfaction with suppliers' parcel sending services (amongst those who use the supplier to send parcels)



Low bases for:
DX: 73% satisfied, 5% dissatisfied.
TNT: 63% satisfied, 11% dissatisfied

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QD1: When sending parcels, how satisfied are you with the services from (insert supplier)?

Base: All who use the supplier: Royal Mail (2830), DHL (422), FedEx (267), Hermes (1212), DPD (518), Parcelforce (602), UPS (272), Yodel (365), *DX (90), *TNT (98) *CAUTION LOW BASE

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

Satisfaction with Royal Mail was consistent across sender types. Non-sellers using other suppliers scored 7 points above sellers for satisfaction.

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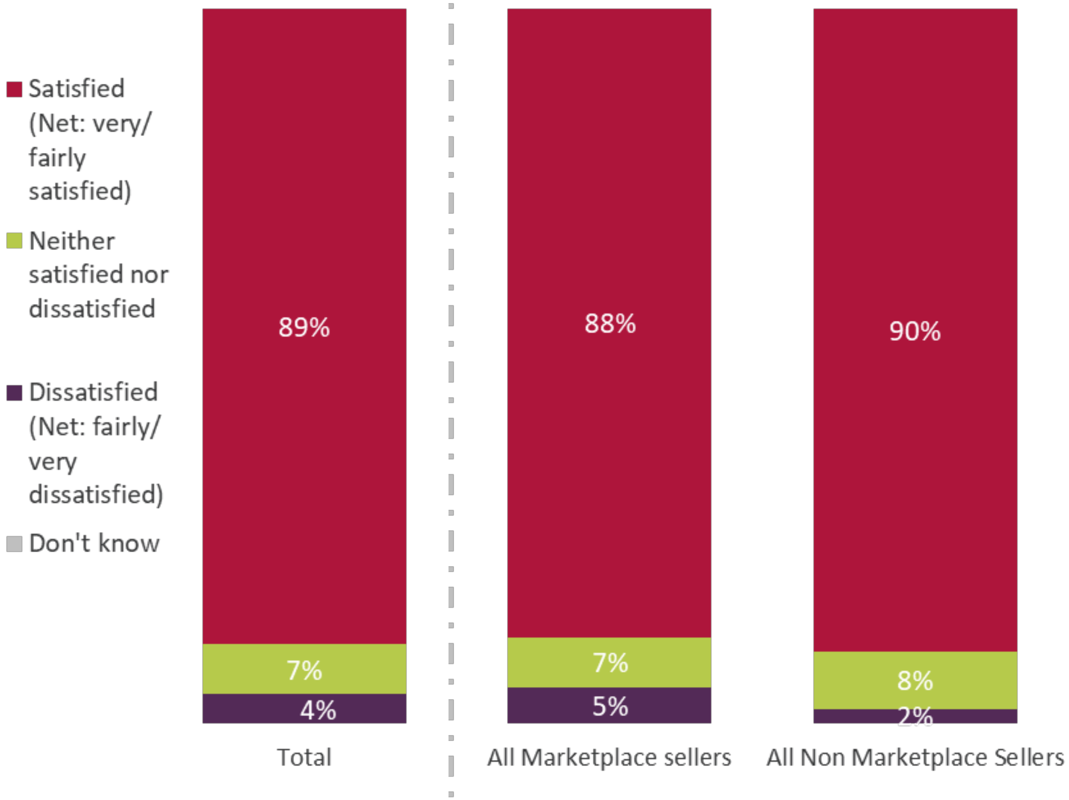
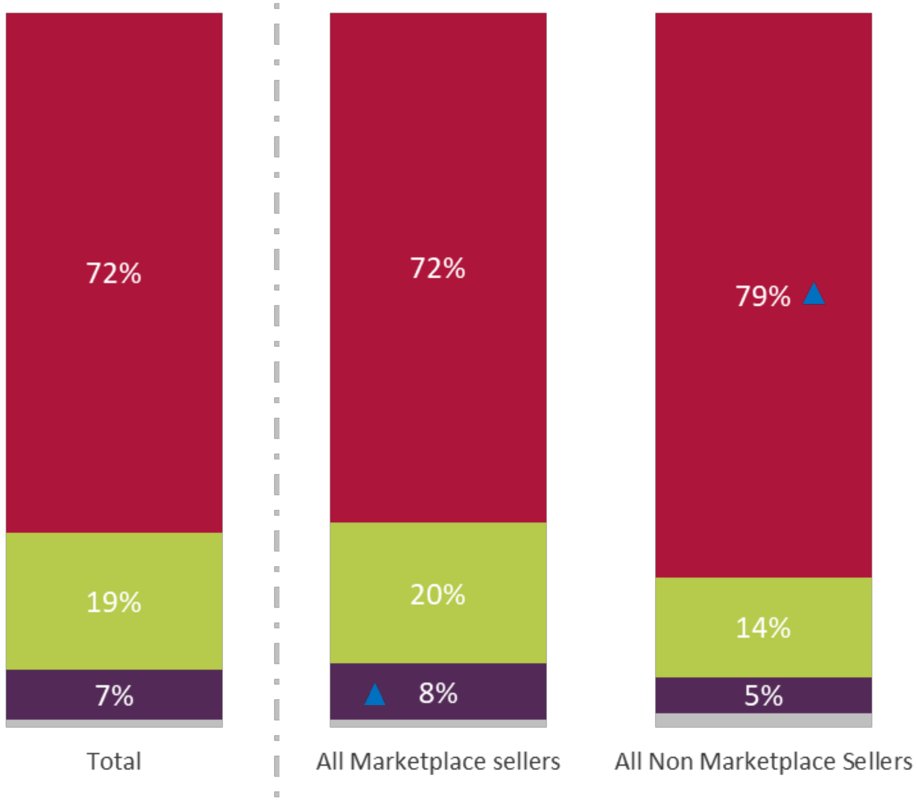
Satisfaction with Royal Mail parcel sending service (amongst those who use Royal Mail to send parcels)



Satisfaction with non Royal Mail parcel sending service (amongst those using to send parcels, mean average across all operators)



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QD1: When sending parcels, how satisfied are you with the services from Royal Mail?

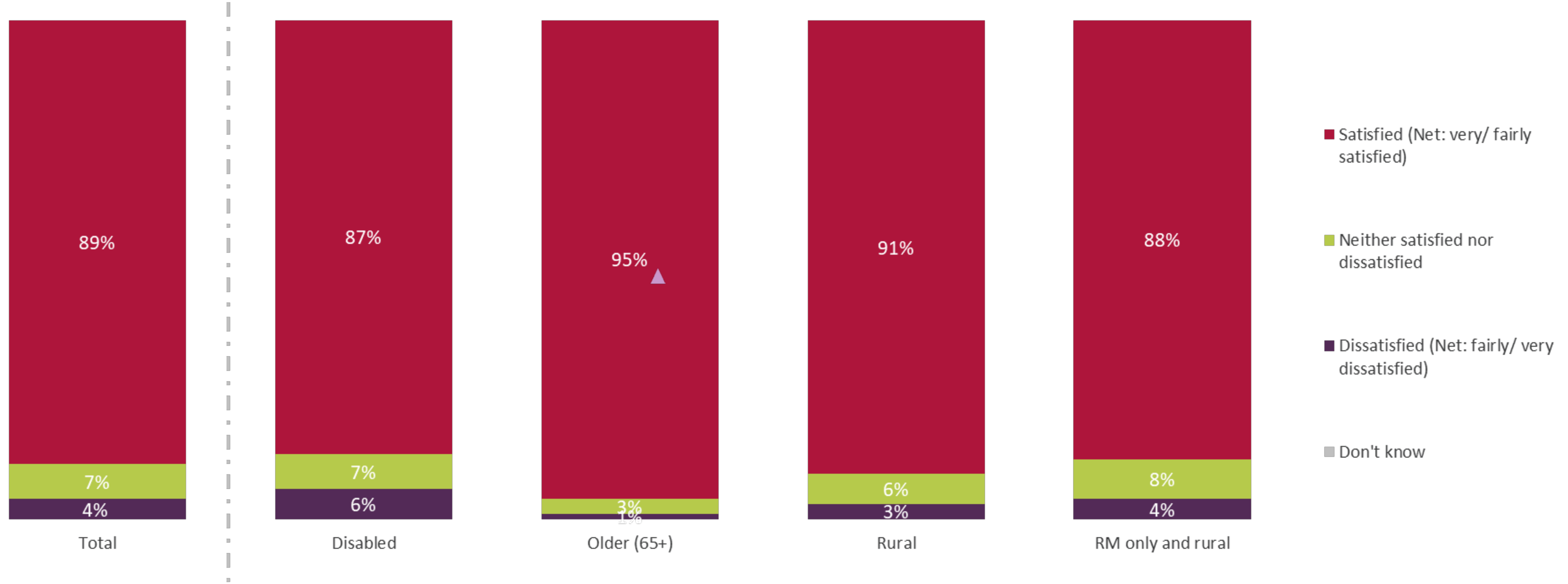
Base: All who use Royal Mail: Total (2830), All Marketplace Sellers (1560), All Non Marketplace Sellers (1270) Mean calculated using data for *individual suppliers with effective base sizes above 50*

▲ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Compared to the total, satisfaction with Royal Mail is similar amongst senders with access needs and those living in rural areas. Those aged 65+ are significantly more likely to be satisfied.

Satisfaction with Royal Mail parcel sending service



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QD1: When sending parcels, how satisfied are you with the services from Royal Mail?

Base: All who use Royal Mail: Total (2830), Disabled (769), Older – 75+ (208), Rural (442), Royal Mail only and rural (222)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Nations at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Taking care of parcels and where they are delivered were key issues mentioned as reasons for dissatisfaction

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Reasons for dissatisfaction with supplier parcel sending services
Examples of open ended responses

“Slower at arriving and have been known to just throw and leave parcels”

“Too expensive”

“I have had parcels which I have sent with DELIVERY COMPANY go missing completely, others turning up to the delivery destination weeks/months later and others delivered to completely wrong addresses. The items I have sent have also been damaged.”

“One of my parcels was marked as delivered, but it was definitely stolen. I have not been able to claim this back despite my best efforts”

“Nothing but issues sending and receiving parcels. They often turn up damaged”

“No proper tracking and slow returns”

“They don’t take care of the parcels. Things arrive damaged no matter how carefully I pack them”

“They are unreliable, break parcels, take too long, have very bad customer service, and don't have enough drop off locations”

“The one occasion I used them they lost the parcel and were then very difficult to deal with”

“A week ago I arranged collection and they have failed to collect at all and there is no way to contact them”

“The time of delivery was two times longer than what was estimated.”

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QD1a: Why are you dissatisfied with the service from (insert supplier)?

Base: All who are dissatisfied with the service

Qualitative slide

Reasonable satisfaction overall with deliveries, but there were issues with missing/delayed parcels across all providers

Issues experienced by participants with ALL operators

- Parcels arrived with a huge delay
- Parcels never arrived
- Parcels arrived damaged or ripped
- Rude staff (mainly Post Office for Royal Mail and delivery drivers for non-Royal Mail)
- Deliveries outside of estimated time slots without updating
- Parcel pick-up outside of provided time window

Issues experienced by participants more likely with non-Royal Mail operators

- Lax security in drop-off shops (e.g., parcel bag unattended)
- Damaged parcel more common experience with non-Royal Mail providers
- Pick-up service arriving late

Issues specific to receiving items:

- Leaving parcels in weird places (e.g. visible to by-passers, uncovered on a rainy day, difficult to find for recipient)
- Not informing recipient about diverted delivery (e.g. delivered to neighbour, or returned to depot)
- Not delivering items to door (particularly in residential tower buildings)

Many people have experience with non-Royal Mail delivery companies *only when receiving a parcel*. Therefore, any negative experience as a recipient tends to shape their perception of the delivery operator overall and influence their provider choice when sending items.

Half had experienced an issue when sending a parcel – sellers were more likely to experience issues compared to solus social senders (63% vs. 29%)

Issues with any supplier when sending parcel

50% had experienced an issue when sending a parcel

(N.B. they were prompted with a list of potential problems).

Type of sender:

Sellers: 63%
Microbusinesses: 89%*
Hobby sellers: 65%

Non-sellers: 31%
Solus-social: 29%

Other demographic splits:

Financially vulnerable: 64% most vulnerable vs. 54% least vulnerable

Disabled: 65%

Most reliant on Royal Mail:

Use Royal Mail only and rural: 24%
Use Royal Mail only: 29%

Age:

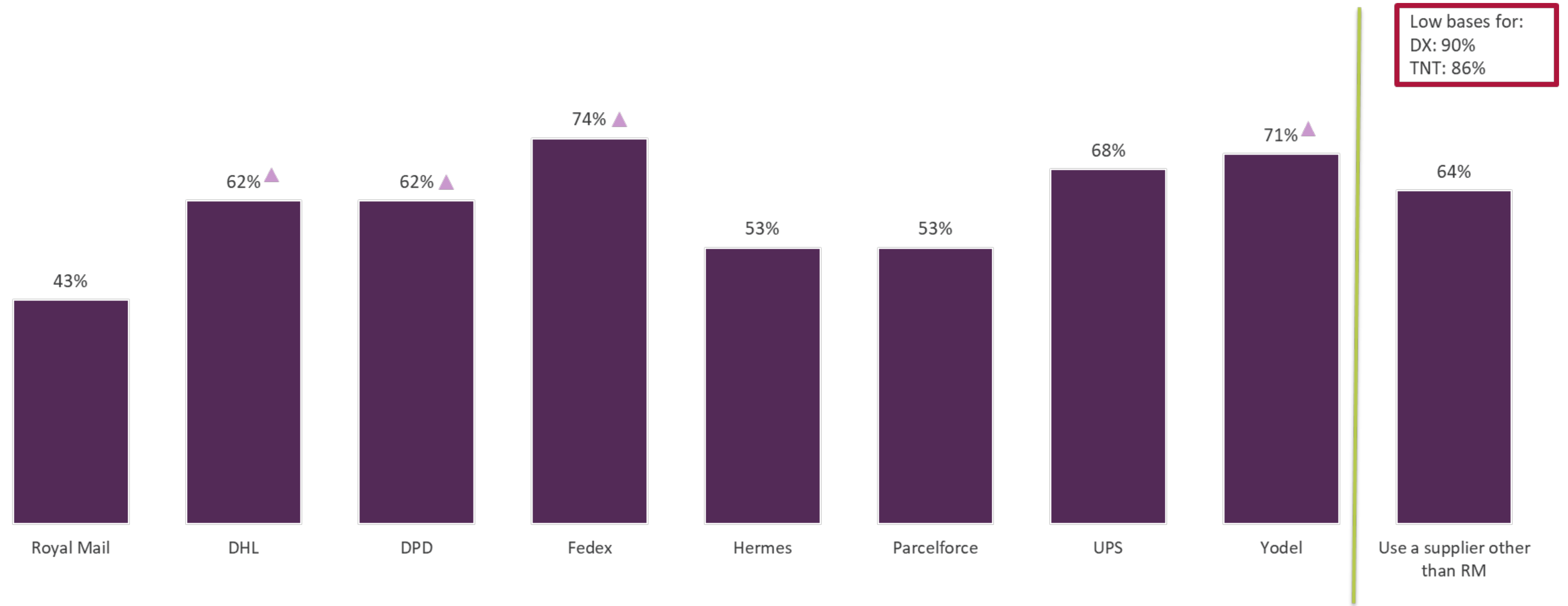
16-24: 78%

75+: 24%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021
QH1: In the last 12 months, when sending parcels, have you experienced any of these issues/problems with the services you have used from any of your parcel delivery suppliers?
Base: Total (3379), England (1597), Scotland (770), Wales (689), Northern Ireland (323), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

Users of Royal Mail are less likely to have experienced an issue with their service - 43% versus 64% of those that do not use Royal Mail

Experience of ANY issue - among users of each supplier



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH1: In the last 12 months, when sending parcels, have you experienced any of these issues/problems with the services you have used from any of your parcel delivery suppliers?

Base: All who use the supplier: Royal Mail (2830), DHL (422), FedEx (267), Hermes (1212), DPD (518), Parcelforce (602), UPS (272), Yodel (365) *Low ESS (<100>55) **Very low ESS (45-55)

▲▼ Significantly higher or lower than Total at a 95% confidence level

Time taken was the top issue for Royal Mail, but there were differences between suppliers for which issue was most commonly experienced

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Issues with suppliers used when sending parcels - among users of each supplier

	Royal Mail	DHL	DPD	DX*	FedEx	Hermes	Parcelforce	TNT*	UPS	Yodel
Time taken for delivery did not meet expectations	13% ▼	16%	10% ▼	16%	24% ▲	19% ▲	16%	21%	16%	15%
Recipient experienced an issue with the parcel being delivered to wrong address/ place or getting lost	11% ▼	19%	18%	25%	27% ▲	15%	11% ▼	27% ▲	18%	19%
Incorrect or insufficient tracking information	12% ▼	16%	15%	27% ▲	22% ▲	16%	14%	20%	14%	16%
Parcel contents/ packaging was damaged before it got to recipient	10% ▼	17%	20% ▲	20%	26% ▲	15%	13%	22% ▲	15%	15%
Unclear information on when and how the parcel would be delivered	10% ▼	19% ▲	16%	21%	19%	16%	13%	16%	15%	16%
Experience in store / in the Post Office when sending the parcel was poor	12% ▼	18%	16%	23% ▲	27% ▲	12%	11%	18%	13%	15%
Service provided was not good value for money	9% ▼	16%	16%	13%	21% ▲	15%	14%	20% ▲	14%	13%
Lack of information or assistance available when arranging a delivery	9% ▼	17%	17% ▲	28% ▲	25% ▲	13%	13%	19%	15%	17%
Issues with delivery staff being impolite or impatient	9% ▼	18% ▲	14%	17%	28% ▲	13%	11%	20% ▲	16%	15%
Limited options for delivery timings	9% ▼	18% ▲	14%	14%	21% ▲	13%	12%	17%	11%	16%
There was a location surcharge for delivery to the recipient's address	8% ▼	16%	17% ▲	30% ▲	28% ▲	10%	11%	17%	15%	16%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH1: In the last 12 months, when sending parcels, have you experienced any of these issues/problems with the services you have used from any of your parcel delivery suppliers?

Base: All who use the supplier: Royal Mail (2830), DHL (422), FedEx (267), Hermes (1212), DPD (518), Parcelforce (602), UPS (272), Yodel (365), *DX (90), *TNT (98) *CAUTION LOW BASE

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

Several different types of issues were experienced by more than one in five senders

All issues were more likely to be experienced by sellers and those with access needs versus overall sample

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Issues with any supplier when sending parcel

Issues with any supplier when sending a parcel	Total	Only use Royal Mail	Use a supplier other than Royal Mail	All Marketplace Sellers	All Non Marketplace Sellers	Disabled
Time taken for delivery did not meet expectations	26%	9%	36% ▲	34% ▲	13% ▼	33% ▲
Recipient experienced an issue with the parcel being delivered to wrong address/place or getting lost	23%	7%	34% ▲	33% ▲	9% ▼	36% ▲
Incorrect or insufficient tracking information	23%	5%	33% ▲	30% ▲	11% ▼	32% ▲
Parcel contents/packaging was damaged before it got to recipient	22%	6%	32% ▲	31% ▲	8% ▼	32% ▲
Unclear information on when and how the parcel would be delivered	22%	5%	32% ▲	29% ▲	11% ▼	33% ▲
Experience in store / in the Post Office when sending the parcel was poor	22%	6%	31% ▲	30% ▲	10% ▼	32% ▲
Service provided was not good value for money	21%	4%	31% ▲	29% ▲	9% ▼	32% ▲
Lack of information or assistance available when arranging a delivery	20%	4%	30% ▲	28% ▲	8% ▼	29% ▲
Issues with delivery staff being impolite or impatient	20%	4%	30% ▲	28% ▲	8% ▼	28% ▲
Limited options for delivery timings	19%	5%	28% ▲	26% ▲	9% ▼	28% ▲
There was a location surcharge for delivery to the recipient's address	19%	5%	28% ▲	27% ▲	6% ▼	27% ▲

Total is a net of experience of each type of issue which was asked for each supplier used in the last 12 months

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH1: In the last 12 months, when sending parcels, have you experienced any of these issues/problems with the services you have used from any of your parcel delivery suppliers?

Base: Total (3379), All Marketplace Sellers (1934), All Non Marketplace Sellers (1445)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

Users of Royal Mail were the least likely to have contacted them about an issue or to make a formal complaint

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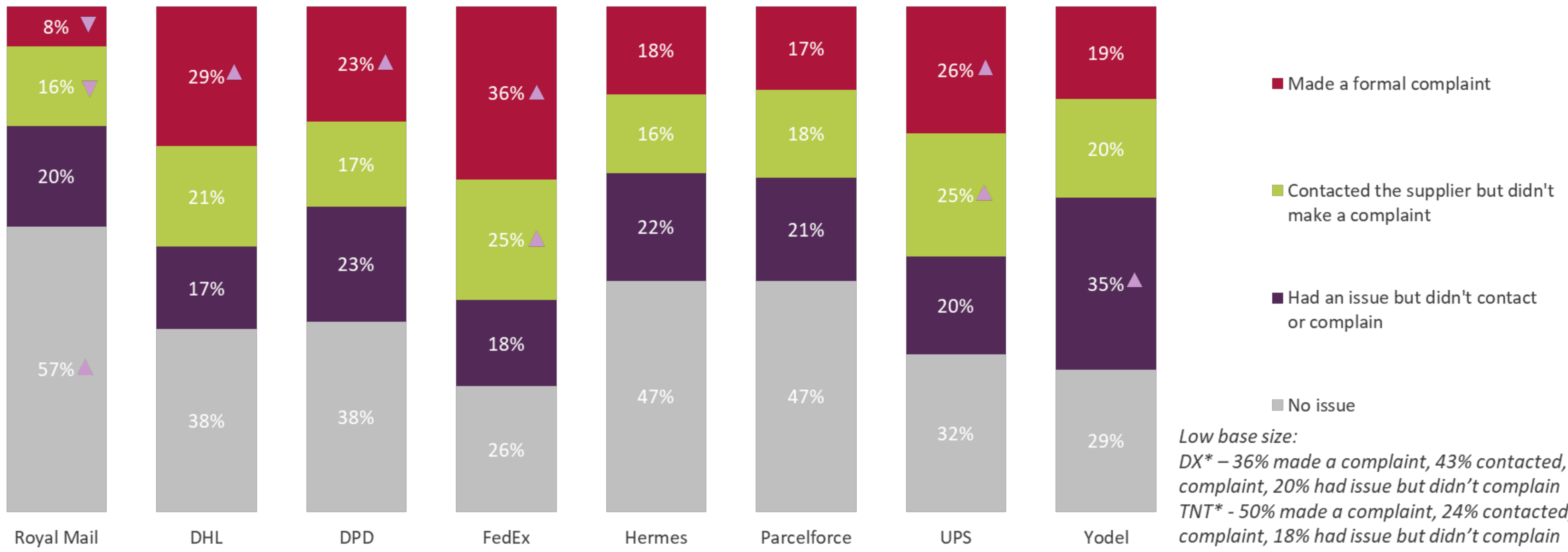
Action taken as a result of an issue with a supplier



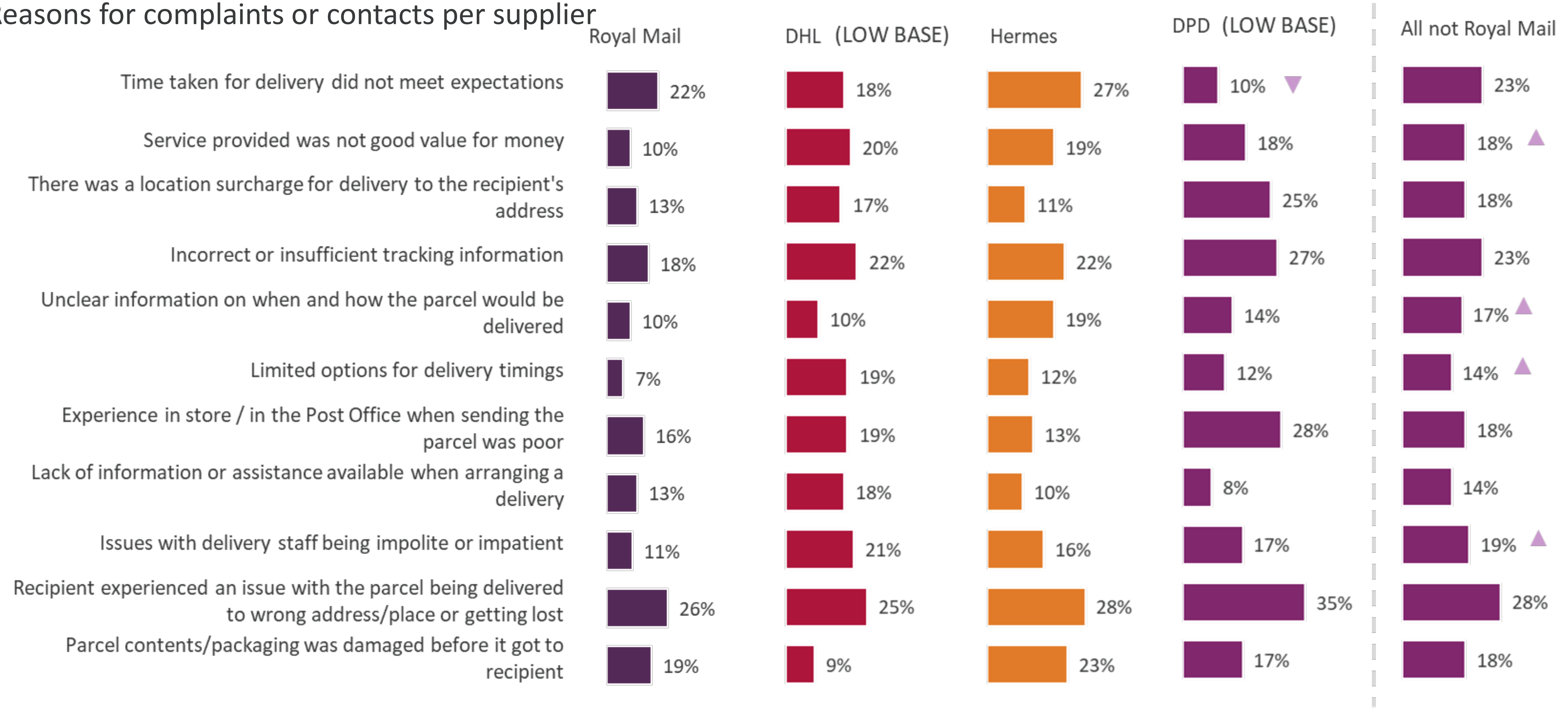
Low base size:
DX – 36% made a complaint, 43% contacted, no complaint, 20% had issue but didn't complain*
TNT - 50% made a complaint, 24% contacted, no complaint, 18% had issue but didn't complain*

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021
QH2: And which of the following dd you do?
Base: All who use the supplier: Royal Mail (2830), DX (90*), DHL (422), FedEx (267), Hermes (1212), DPD (518), Parcelforce (602), TNT (153*), UPS (272), Yodel (365) *Low ESS (<100>55)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

‘Recipient experienced an issue with the parcel being delivered to wrong address/place or getting lost’ was the most common reason for contacting and/or complaining

Reasons for complaints or contacts per supplier



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH4c/ QH4d: And what was the reason for your complaint you made to (insert supplier)/ And when you contacted (insert supplier) what was that about?

Base: All who complained/ contacted a supplier about an issue: Royal Mail (291), DHL (89*), Hermes (278), *Low ESS (<100>55) *Charted for individual suppliers with effective bases above 55 Total not RM (771)*

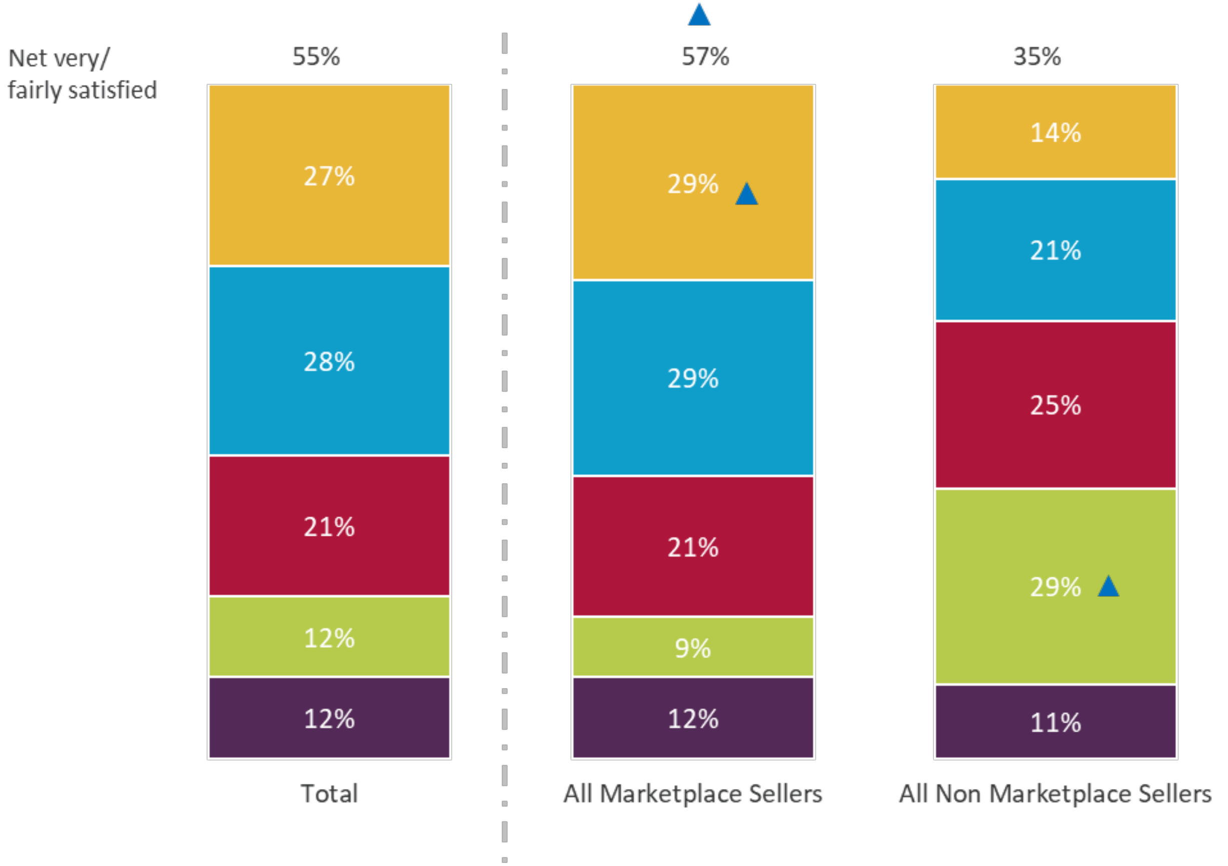
▲▼ *Significantly higher or lower than Royal Mail at a 95% confidence level*

Over half of those that complained to a supplier were satisfied with the response

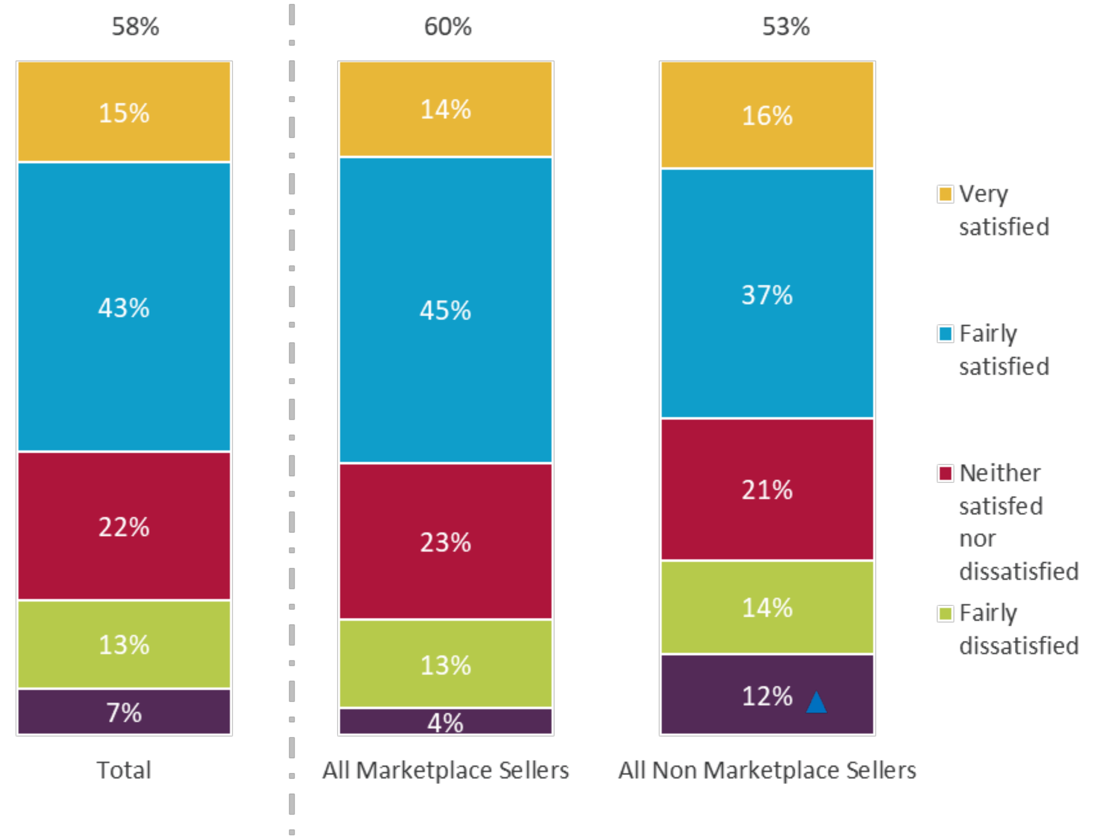
Sellers were significantly more likely to be satisfied than Non-sellers

Overall satisfaction with response to complaints and contacts made

Satisfaction with response to complaints



Satisfaction with response to contacts



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

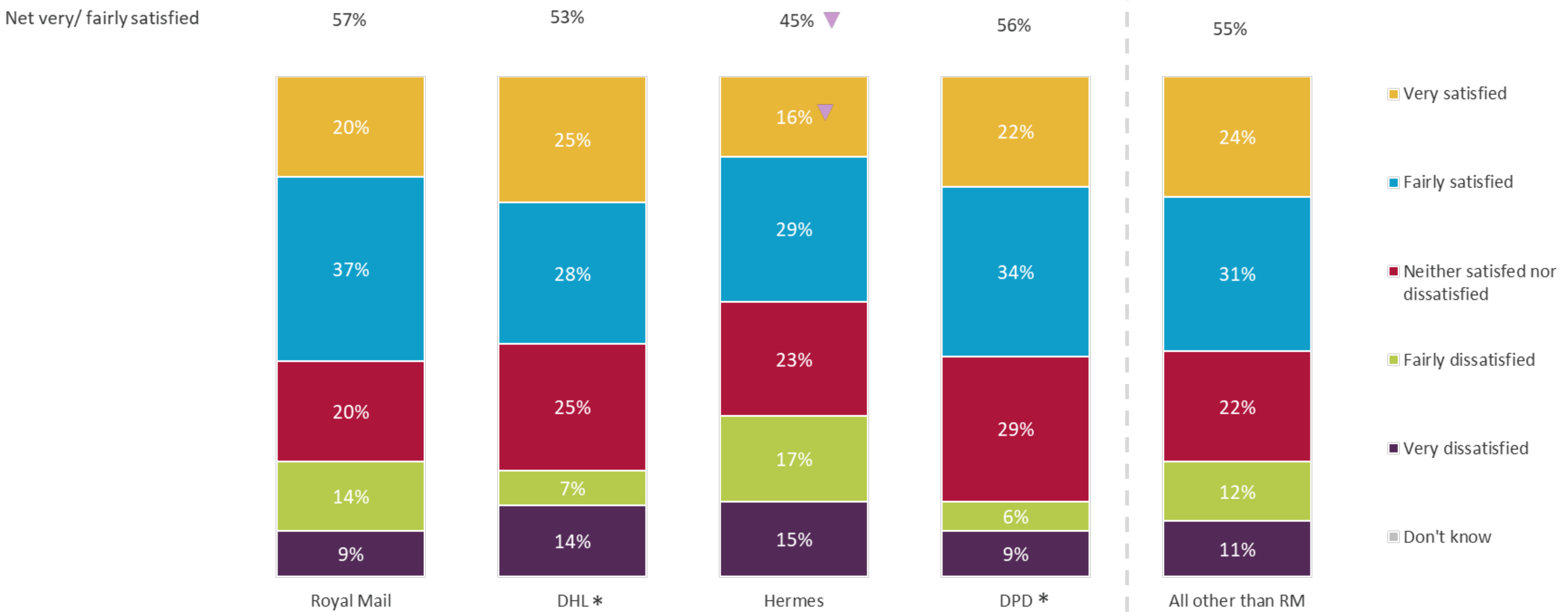
QH5: Thinking of (insert supplier)'s response to your complaint/ contact when you contacted them, how satisfied were you with their response?

Base: All who have complained to a supplier about an issue: Total (719), All Marketplace Sellers (611), All Non marketplace Sellers (108*)/ All who have contacted a supplier about an issue: Total (343), All Marketplace Sellers (234), All Non marketplace Sellers (109*) *Low ESS (<100>55) **Very low ESS (45-55)

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Satisfaction levels with the way a complaint or contact are handled vary from between 45% to 57% between suppliers – although there are few significant differences

Satisfaction with response to complaint/ contact by supplier



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH5: Thinking of (insert supplier)'s response to your complaint/ contact when you contacted them, how satisfied were you with their response?

Base: All who have complained/ contacted a supplier about an issue: Royal Mail (291), DHL (89*), Hermes (278), DPD (92*) , All other than RM (771) *Low ESS (<100>55) *Charted for individual suppliers that have base sizes big enough for complaints/ contacts*

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

Reasons for dissatisfaction with supplier response to complaint/ contact – examples of open ended responses

"Buyer never got item and I never got money back"

"Took too long to respond - 4 weeks"

"Appalling customer service. They basically didn't care"

"It was very difficult to contact them as they no longer provide a phone number..."

"They lied about where the parcel was, this happened on two occasions, then parcel then mysteriously turned up but many days late"

"The reply was generic and unhelpful. They had no interest in helping me with my issue and were completely unacceptable"

"Took three days to respond. By then I had taken my parcel to an alternative collection location."

"The customer service was horrible so I've decided not to send any more parcels with this company in the future"

"No response at all"

"They wanted to absolve all responsibility and communicated poorly"

"There was no solution"

"They denied that there was a problem"

"They were unable to explain why the parcel had not gone to the correct address and could not explain why the tracking information showed the parcel in the wrong region for delivery."

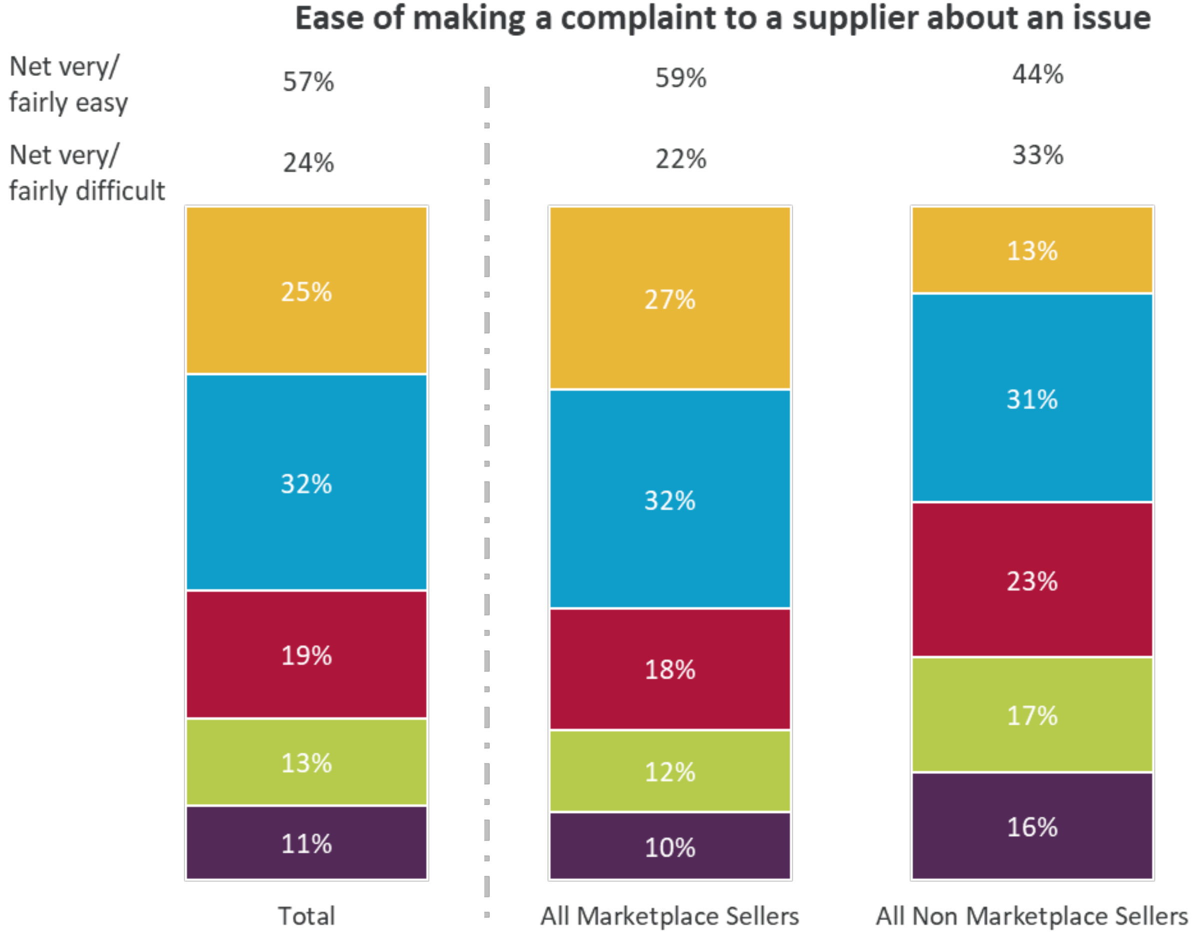
Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

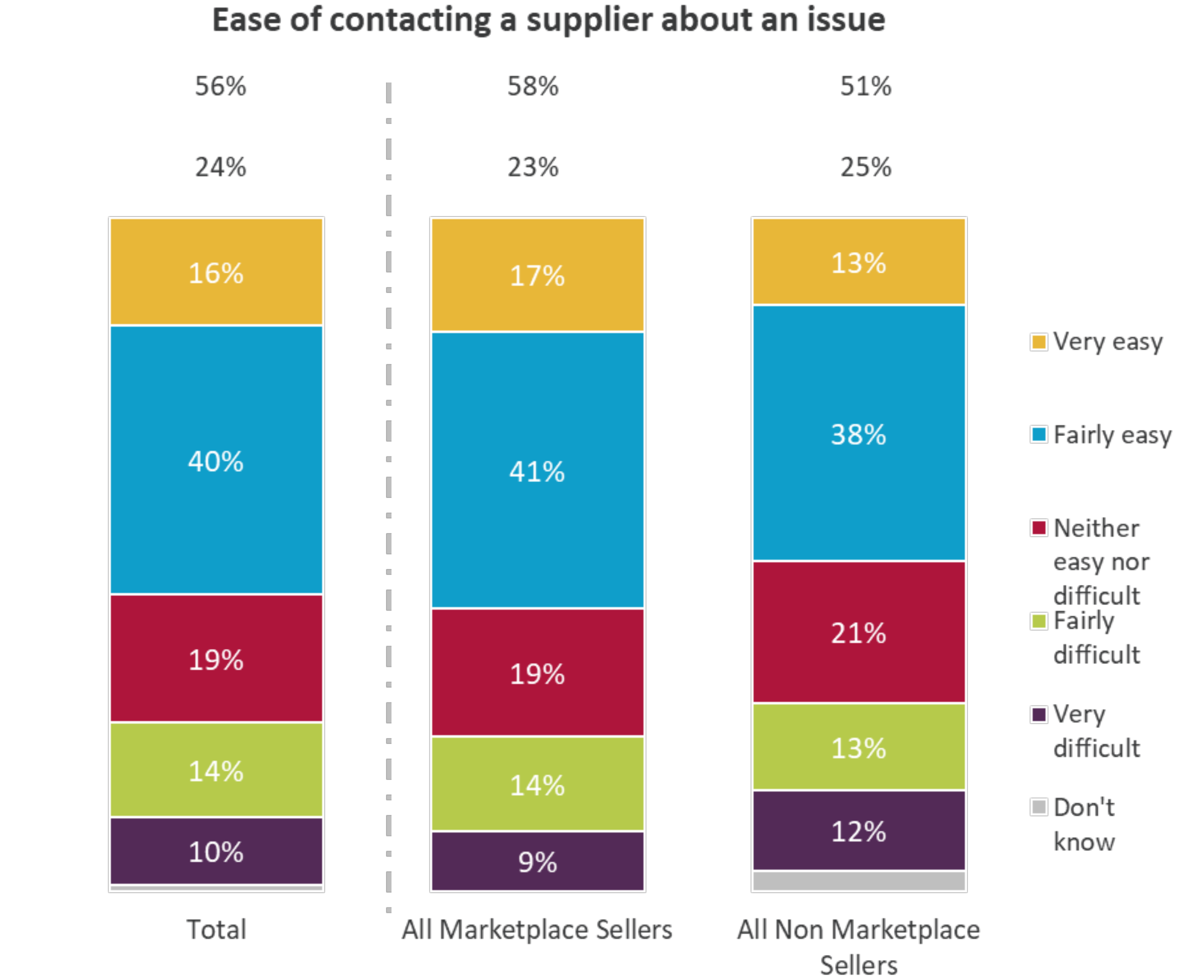
QH5a: You said you were dissatisfied with (insert supplier) response to your complaint/ contact. Why was that?

Base: All who are dissatisfied with the supplier response to their complaint/ contact

A quarter of those that made a complaint to their supplier, or contacted their supplier found it difficult to do

Ease of making a complaint or contacting a supplier about an issue





Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

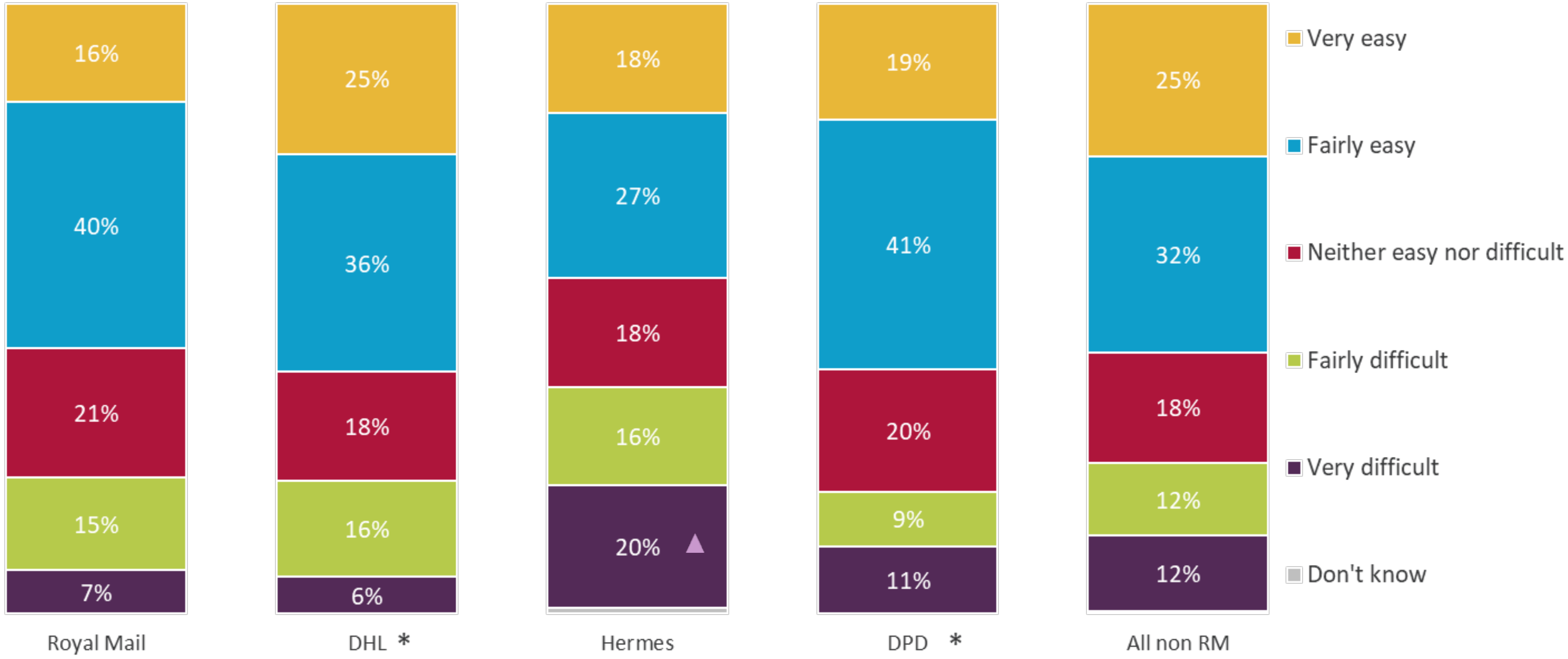
QH8: How easy or difficult did you find it to contact/ complain about (insert supplier)?

Base: All who have complained to a supplier about an issue: Total (719), All Marketplace Sellers (611), All Non marketplace Sellers (108*)/ All who have contacted a supplier about an issue: Total (343), All Marketplace Sellers (234), All Non marketplace Sellers (109*) *Low ESS (<100>55) **Very low ESS (45-55) *Charted for individual subgroups that have base sizes big enough*

There were some differences between operators in how easy it was perceived to be to make a contact or complain about an issue

Ease of making a complaint or contacting a supplier about an issue **– by supplier**

	Royal Mail	DHL *	Hermes	DPD *	All non RM
Net very/ fairly easy	56%	61%	45% ▼	60%	58%
Net very/ fairly difficult	22%	22%	36%	20%	24%



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH8: How easy or difficult did you find it to contact/ complain about (insert supplier)?

Base: All who have complained/ contacted a supplier about an issue: Royal Mail (291), DHL (89*), Hermes (278), DPD (92**) , Supplier other than RM (770). *Low ESS (<100>55)

Charted for individual suppliers that have base sizes big enough for complaints/ contacts

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

Getting through to the right person was the most widely experienced difficulty when trying to complain to or contact a supplier

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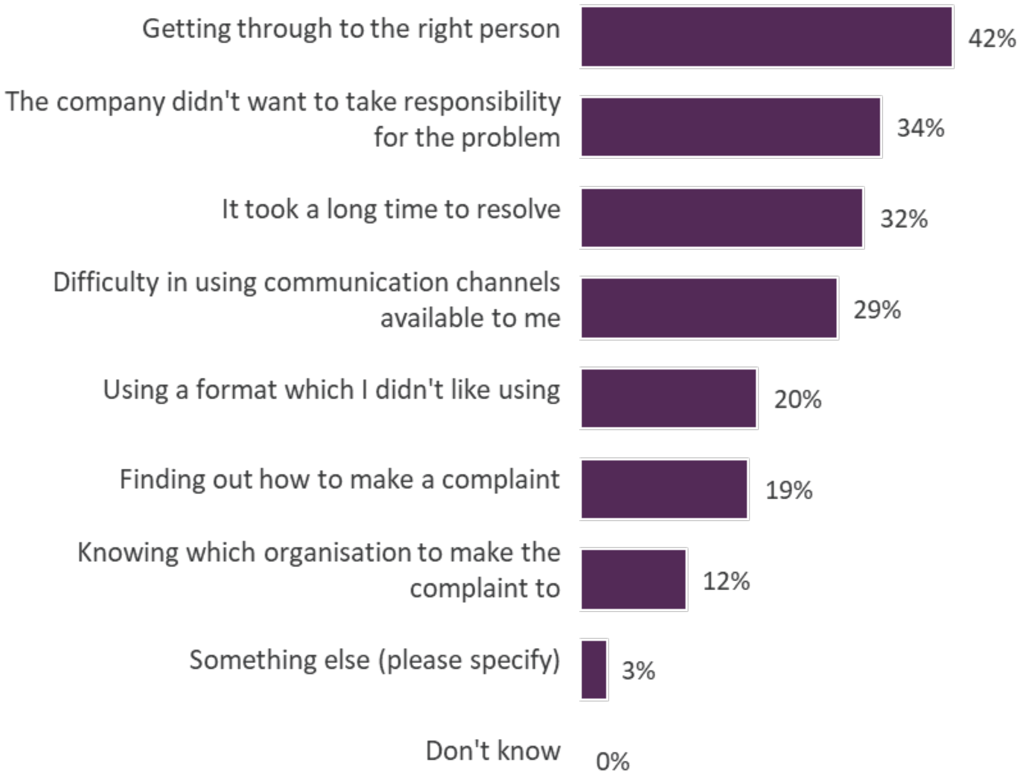
Difficulties experienced when making a complaint/ contacting a supplier



	All Marketplace Sellers	All Non Marketplace Sellers
Getting through to the right person	39%	52%
The company didn't want to take responsibility for the problem	34%	32%
It took a long time to resolve	33%	30%
Difficulty in using communication channels available to me	27%	38%
Using a format which I didn't like using	22%	16%
Finding out how to make a complaint	21%	11%
Knowing which organisation to make the complaint to	11%	17%
Something else (please specify)	2%	8%
Don't know	0%	2%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH9: What was difficult?

Base: All who found it difficult to make a complaint/ contact: Total (266), All Marketplace Sellers (186), All Non Marketplace Sellers (80**) *Low ESS (<100>55) **Very low ESS (45-55)

Charted for individual subgroups that have base sizes big enough

51% of issues complained about were not resolved at all **or** partly resolved

55% of issues contacted about were not resolved at all **or** partly resolved

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Extent to which issue complained about was resolved

Extent to which issue complained about was resolved	Total	Sellers	Non-sellers
Completely resolved	47%	49%	35%
Partly resolved	42%	41%	52%
Not resolved at all	9%	9%	9%
Don't know	2%	1%	4%
Net: completely or partly resolved	**90%**	**90%**	**87%**
Net: Not completely resolved (partly resolved or not resolved at all)	**51%**	**50%**	**61%**

Extent to which issue contacted about was resolved

Extent to which issue contacted about was resolved	Total	Sellers	Non-sellers
Completely resolved	42%	43%	39%
Partly resolved	42%	44%	35%
Not resolved at all	13%	11%	20%
Don't know	3%	2%	6%
Net: completely or partly resolved	**84%**	**87%▲**	**74%**
Net: Not completely resolved (partly resolved or not resolved at all)	**55%**	**55%**	**55%**

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH11: In your opinion was (insert supplier) able to successfully resolve your issue/ complaint. Was it…?

Base: All who have complained to a supplier about an issue: Total (719), All Marketplace Sellers (611), All Non marketplace Sellers (108*)/ All who have contacted a supplier about an issue: Total (343), All Marketplace Sellers (234), All Non marketplace Sellers (109*) *Low ESS (<100>55)

▲▼ Significantly higher or lower than Total at a 95% confidence level

▲▼ Significantly higher or lower than all other Sender types at a 95% confidence level

Four in five (83%) said their complaint or contact with Royal Mail arising from an issue was resolved, 38% said it was completely resolved (lower than for other operators)

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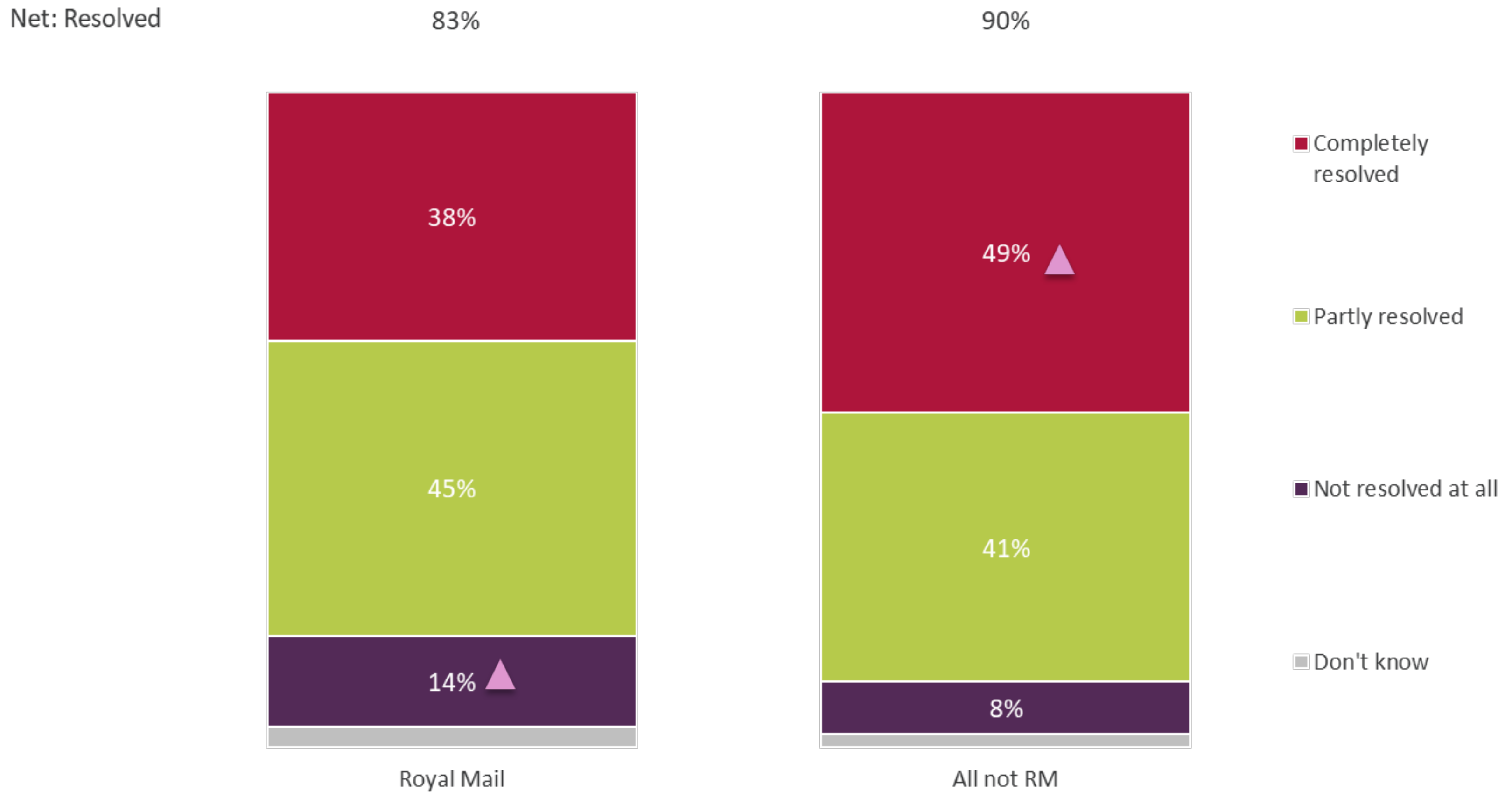
Extent to which complaint/ contact was resolved



Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021
QH11: In your opinion was (insert supplier) able to successfully resolve your issue/ complaint. Was it…?
Base: All who have complained/ contacted a supplier about an issue: Royal Mail (291), All other than RM (771)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

Almost half did not receive the redress they were hoping for or expecting

Non-sellers were significantly less likely to be seeking financial redress

Level of financial redress received as a result of complaint/ contact

Level of financial redress received as a result of complaint/ contact	Total	Sellers	Non-sellers	Royal Mail	Hermes	All not RM
Received financial redress at a level I thought was sufficient/ appropriate	37%	40% ▲	25%	27%	31%	41%
Received but not what I was expecting/ hoping for	34%	36%	26%	37%	31%	33%
Didn’t receive any redress but I wasn't seeking that	13%	9%	31% ▲	15%	23%	12%
Didn't receive any redress and I was expecting/ hoping for it	13%	12%	14%	18%	13%	11%
Don't know	3%	1%	4%	4%	2%	2%
Net: received sufficient/ appropriate redress OR didn’t receive but was not seeking any	**50%**	**49%**	**50%**	**42%**	**54%**	**53%**
Net: received no/ insufficient redress relative to what I was expecting/ hoping for	**47%**	**48%**	**50%**	**47%**	**44%**	**44%**

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH13: Did the nature of your complaint/ issue mean you had cause to seek financial redress? And if so did you receive this to an adequate level?

Base: All who have complained/ contacted a supplier about an issue: Total (1062), All Marketplace Sellers (845), All Non marketplace Sellers (217) *Low ESS (<100>55) (45-55)

Two in five (39%) of those that contacted a supplier, but didn't make a complaint said this was because it *'wouldn't change anything anyway'*

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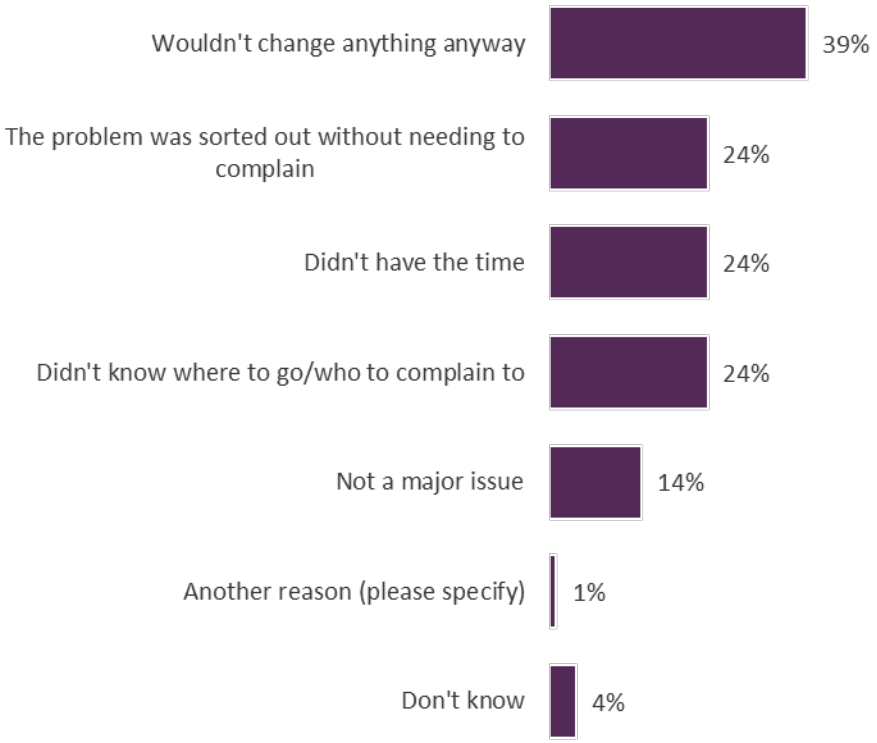
Reasons **contacting a supplier** instead of making a complaint



	All Sellers	All Non Sellers
Wouldn't change anything anyway	40%	30%
The problem was sorted out without needing to complain	24%	23%
Didn't have the time	24%	24%
Didn't know where to go/who to complain to	27%	12%
Not a major issue	11% ▲	25% ▼
Another reason (please specify)	0%	4% ▲ ▲
Don't know	4%	2% ▲ ▲

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021
QH14: Why didn't you make a complaint about (supplier)?
Base: All who contacted a supplier about an issue but didn't make a complaint: Total (731), All Marketplace Sellers (581), All Non Marketplace Sellers (150*) *Low ESS (<100>55)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Two in five (37%) of those who didn't take any course of action (i.e. contact or complain about an issue) said this was because it *'wouldn't change anything anyway'*

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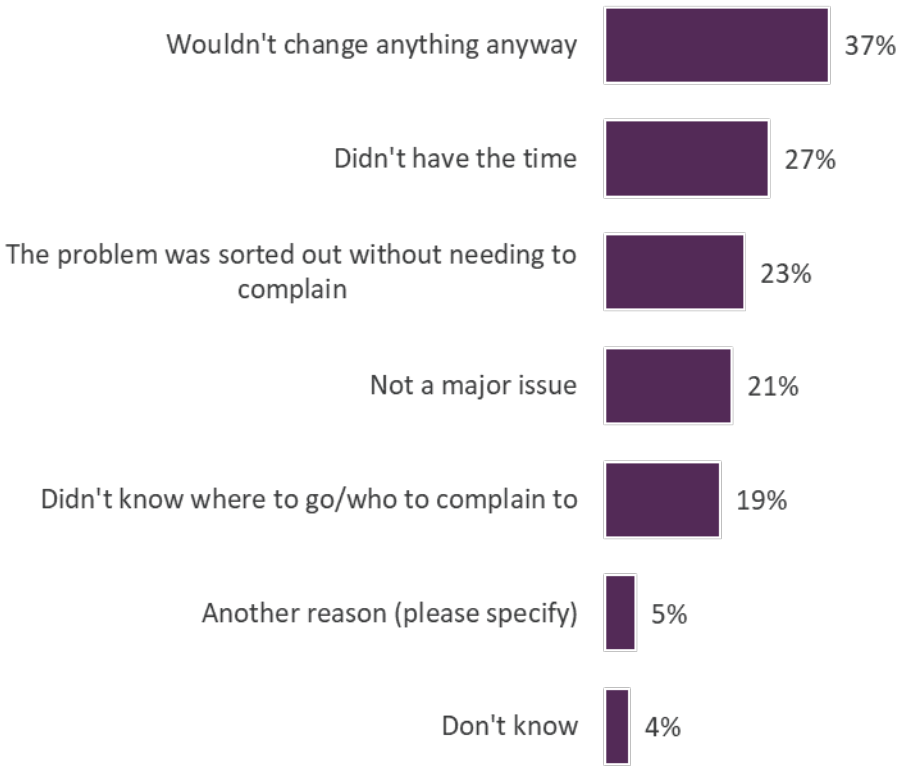
Reasons for **not contacting or making a complaint** about an issue



	All Marketplace Sellers	All Non Marketplace Sellers	Royal Mail	Mean average (not RM)
Wouldn't change anything anyway	38%	35%	36%	39%
Didn't have the time	28%	23%	26%	31%
The problem was sorted out without needing to complain	24%	20%	20%	26%
Not a major issue	18%	30% ▲▲	27% ▲	17%
Didn't know where to go/who to complain to	21% ▲	14%	14% ▼	21%
Another reason (please specify)	3%	9% ▲▲	8%	2%
Don't know	5%	2%	6%	5%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

QH9b: You said that you had experienced an issue but that you didn't contact (supplier) or make a complaint. Why was that?

Base: All who had an issue with a supplier but didn't contact or make a complaint: Total (932), All Marketplace Sellers (617), All Non marketplace Sellers (315), Royal Mail (565), Other suppliers with effective bases above 50 for mean average)

▲▼ *Significantly higher or lower than Total at a 95% confidence level*

▲▼ *Significantly higher or lower than all other Sender types at a 95% confidence level*

Qualitative slide

In the event of an issue having occurred with a parcel, participants had typically made contact in order to find out what happened - but rarely went on to make an official complaint

(This slide shows a triangle titled ‘Four levels of escalation’ with the four levels being ‘take no action’ (the largest level at the bottom), ‘make an enquiry’ (the second largest level, one from the bottom), ‘claim a refund’ (the second smallest level, one from the top) and finally ‘complain’ (the smallest level at the top of the triangle). These levels are indicative of the proportion of respondents escalating their complaints)

Four Levels of Escalation

Complain: Only very few participants reached this stage. A reason for doing so was, for example, when an urgent item sent as Special Delivery with 1pm Next Day Guarantee didn’t arrive on time – or when they have had very bad experience after making initial contact.

Claim a refund: For participants, claiming a refund was a disappointing and frustrating stage – many felt the minimum time an item must be missing before a claim could be made was too long; and there was a negative surprise when they learnt that they only got partially reimbursed for their postage.

Make an enquiry: Participants contacted the operator primarily to track down a parcel and get updated delivery times rather than making a complaint or getting a refund – particularly for high-value and unique items.

Take no action: Many participants did not raise an issue with the delivery operator but simply stopped using this operator altogether. This appeared to apply particularly to sellers of low-value/high-volume items. Some would change the delivery operator next time they send something (provided there is a convenient alternative for their circumstances).

Participant satisfaction with complaint procedures varied (1)

Royal Mail

- There were often higher expectations from participants and this could lead to disappointment if not delivered upon (e.g. long phone queue, non-friendly agent, slow email response, etc.)
- Some feel it's a painful process with very little reward
- Experience with the phone line is inconsistent. Some were happy but others felt the phone staff lacked empathy and didn't demonstrate their understanding about the impact it would have
- Webchats can be frustrating if they make it harder to speak to a real person
- The impact of poor service is generally felt more by businesses than social senders, since it affects their profit and brand
- The minimum delay period before a claim can be processed is felt to be too long nowadays (particularly by businesses)
- However, participants weren't reporting that Royal Mail contested claims – there is a default assumption that the customer claim is genuine and justified

The participant consensus seemed to suggest that the easiest and most effective way of giving customers a positive experience when raising an issue is making the phone line easily accessible and ensure that staff demonstrate empathy and understanding

Qualitative slide

Participant satisfaction with complaint procedures varied (2)

Other operators

- Much more inconsistent experience
- Some participants regarded Hermes as inaccessible ("impossible to speak to a human being") – although some remarked that they have improved
- Expectations of the complaints procedure of non-Royal Mail operators is often shaped by the overall customer service they experience with these operators at the doorstep (including as receivers).
- They see that their delivery staff are under more pressure than Royal Mail post(wo)men and therefore assume this trickles through to their ways of dealing with complaints
- Most senders know they are buying a value service
- Some had a positive experience with FedEx which is perceived very customer-centric
- With intermediaries (e.g., Parcel2Go) the process is somewhat blurred. Participants who had the experience were unsure who owns the process and who is ultimately responsible to refund the customer
- *(Pink text to denote finding specific to respondents without internet): In more rural areas, where parcel services are provided by two or more operators it can create issues with 'blame' – one respondent sent an £800 car spoiler, which arrived damaged. After being passed around the various companies complaints depts for weeks, he settled for £200 insurance*
- Participants had little experience with DHL, DPD, Yodel, etc. however expectations were not as high as for Royal Mail.

Qualitative slide

The consensus amongst participants appeared to be for all operators to be covered by the same complaints standards

- Awareness for the USO and its purpose was low – and was explained in general terms only due to time constraints within the research. Within this context:
- Participants felt that there was not justification for different standards for Royal Mail and other operators, and there was some opinion that *that it is unfair on Royal Mail being the only operator regulated*
- Participants were surprised that all operators are not held to the same standard
- General consensus amongst participants that all parcel service companies should provide the same rights to users and be held to the same standards.
- *(Purple italic text to denote respondent verbatim quote) “You need to regulate everyone or no-one. It makes no sense to just regulate Royal Mail.”*

Appendix

Sample profile

Unweighted profile of groups (1)

Profile	Total	England	Scotland	Wales	Northern Ireland	All Marketplace Sellers	All Non Marketplace Sellers
Male	44%	48%	39%	39%	41%	44%	43%
Female	56%	51%	61%	61%	58%	55%	57%
Non binary	0%	0%	0%	0%	1%	0%	0%
16-17	0%	0%	0%	0%	0%	0%	0%
18-24	9%	7%	11%	12%	14%	13%	5%
25-44	39%	32%	48%	41%	41%	49%	25%
45-64	34%	35%	30%	35%	33%	30%	40%
65-74	11%	16%	4%	7%	7%	6%	17%
75+	7%	9%	7%	4%	4%	3%	13%
ABC1	64%	63%	68%	62%	63%	66%	61%
C2DE	36%	37%	32%	38%	37%	34%	39%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Sample profile

Unweighted profile of groups (2)

Profile	Total	England	Scotland	Wales	Northern Ireland	All Marketplace Sellers	All Non Marketplace Sellers
AB	30%	28%	35%	29%	30%	33%	27%
C1	34%	35%	32%	33%	33%	33%	35%
C2	16%	17%	15%	15%	14%	17%	14%
DE	20%	20%	18%	23%	23%	17%	25%
Urban	84%	87%	86%	78%	82%	87%	81%
Rural	16%	13%	14%	22%	18%	13%	19%
Deep rural/ remote	15%	11%	22%	18%	14%	15%	16%
Most financially vulnerable	15%	14%	14%	18%	22%	16%	14%
Potentially financially vulnerable	43%	46%	34%	44%	41%	39%	47%
Least financially vulnerable	36%	34%	44%	33%	31%	39%	31%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Sample profile

Weighted profile of groups (1)

Profile	Total	England	Scotland	Wales	Northern Ireland	All Marketplace Sellers	All Non Marketplace Sellers
Male	49%	51%	40%	40%	38%	50%	47%
Female	51%	49%	60%	59%	60%	50%	53%
Non binary	0%	0%	0%	1%	1%	0%	0%
16-17	0%	0%	1%	0%	0%	0%	1%
18-24	13%	13%	17%	19%	19%	19%	5%
25-44	38%	36%	49%	44%	43%	46%	26%
45-64	31%	31%	24%	29%	31%	27%	37%
65-74	10%	11%	3%	4%	5%	5%	17%
75+	8%	9%	6%	4%	2%	3%	15%
ABC1	58%	58%	61%	56%	60%	59%	57%
C2DE	42%	42%	39%	44%	40%	41%	43%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Sample profile

Weighted profile of groups (2)

Profile	Total	England	Scotland	Wales	Northern Ireland	All Marketplace Sellers	All Non Marketplace Sellers
AB	26%	26%	30%	24%	27%	29%	22%
C1	32%	32%	32%	32%	33%	30%	35%
C2	22%	22%	20%	20%	18%	25%	18%
DE	20%	20%	19%	24%	22%	17%	25%
Urban	86%	88%	82%	78%	63%	88%	84%
Rural	14%	12%	18%	22%	37%	12%	16%
Deep rural/ remote	12%	10%	20%	17%	20%	10%	14%
Most financially vulnerable	16%	16%	17%	20%	26%	18%	13%
Potentially financially vulnerable	44%	45%	35%	44%	38%	41%	49%
Least financially vulnerable	34%	34%	41%	31%	30%	36%	30%

Source: Ofcom Parcels Review C2X Research 2021 – online survey, fieldwork carried out by BVA BDRC, July 2021/ August 2021

Financial vulnerability – method of calculation

Financial vulnerability is calculated by household income and number of adults and children in the household

Most financially vulnerable	**Potentially financially vulnerable**	**Least financially vulnerable**
Household income under £10,399 All respondents		
Earning between £10,400 - £25,599 1 adult, 2+ children 2 adults, 2+ children 3+ adults, 0+ children	**Earning between £10,400 - £25,599** 1 adult, 0-1 child 2 adults, 0-1 child 3 adults, no children	
Earning between £26,000 - 36,399 1 adult, 4+ children 2 adults, >3 children 3 adults, 2+ children 4 adults, 1+ children 5+ adults, 0+ children	**Earning between £26,000 - £36,399** 1 adult, 1 to 3 children 2 adults, 0 to 3 children 3 adults, 0 to 1 child 4 adults, no children	**Earning between £26,600 - £36,399** 1 adult, 0 children
Earning between £36,400 - 51,999 1 adults, >3 children 2 adults, 3+ children 3 adults, 3+ children 4 adults, 2+ children 5+ adults, 0+ children	**Earning between £36,400 - 51,999** 1 adult, 2-3 children 2 adults, 1-2 children 3 adults, 0-2 children 4 adults, 0-1 child 5 adults, 0 children	**Earning between 36,400 - £51,999** 1 adult, 0-1 child 2 adults, 0 children
		Household income £52,000+ All households

Qualitative Research Profile

Qualitative slide

Profile of participants who were social senders (3x groups in Northern Ireland, Northern England and Wales – 14 respondents in total)

LOCATION

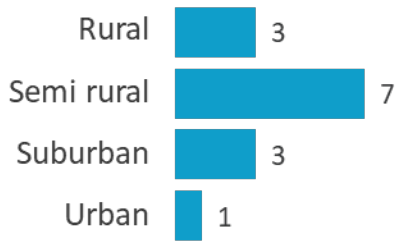


Chart shows half (7) of all social sender respondents were based in semi-rural locations

SIZE OF PARCELS SENT

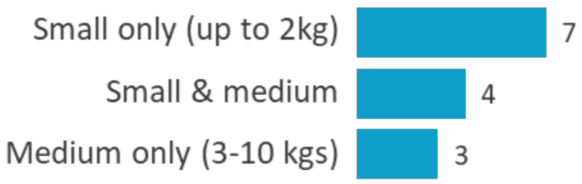


Chart shows half (7) of all parcels sent by social sender respondents are small (up to 2 KG)

NO. PARCELS SENT IN LAST 3 MONTHS

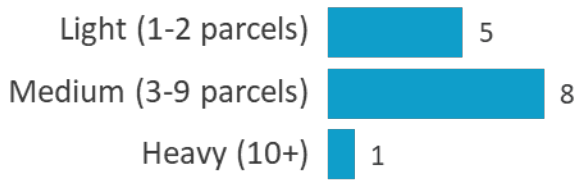


Chart shows most (8) social sender respondents sent between 3-9 parcels in the last 3 months

OPERATORS USED MOST OFTEN

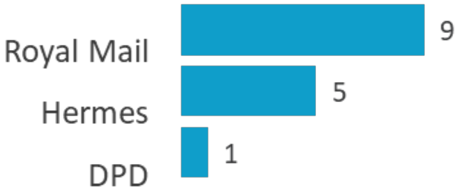


Chart shows most social sender respondents (9) use Royal Mail most often

OPERATORS USED OCCASIONALLY

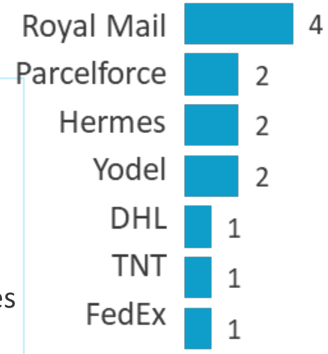


Chart shows the largest minority of social sender respondents (4) use Royal Mail, followed by Parcelforce, Hermes and Yodel (2 each)

USE OF PCWs

Chart shows most social sender respondents (9) have never used a price comparison website to send parcels

Qualitative slide

Profile of participants who were hobby sellers (1x group of 5 respondents in Scotland)

LOCATION

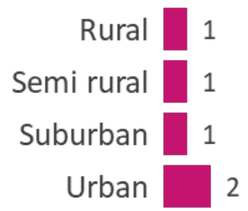


Chart shows even spread of hobby seller respondents across urban, suburban, semi-rural and rural locations

SIZE OF PARCELS SENT

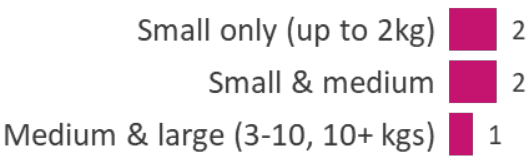


Chart shows even spread of size of parcels sent by hobby seller respondents from less than 2kg up to 10+kgs

HOW OFTEN SELL VIA MARKETPLACE

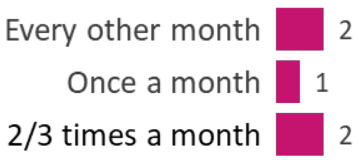
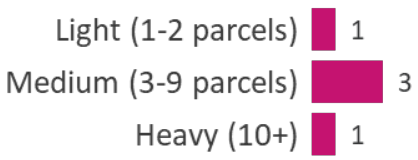


Chart shows even spread of how often hobby seller respondents sell via marketplaces, from every other month up to 2/3 time a month

NO. PARCELS SENT IN LAST 3 MONTHS



Most hobby seller respondents (3) sent a medium no. of parcels (between 3-9)

OPERATORS USED MOST OFTEN

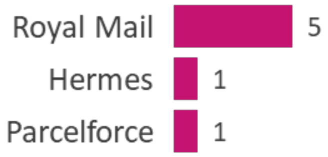


Chart shows most hobby seller respondents (5) use Royal Mail most often

OPERATORS USED OCCASIONALLY

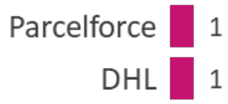
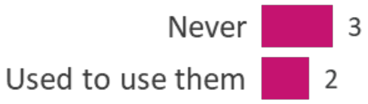


Chart shows 1 hobby seller respondent occasionally used Parcelforce while another occasionally used DHL

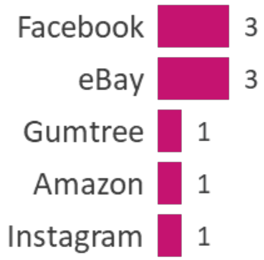
USE OF PCWs



Most hobby seller respondents (3) have never used a price comparison website, 2 used to use them

ONLINE MARKETPLACE USED

Most hobby seller respondents used online marketplaces Facebook (3) and eBay (3)



Qualitative slide

Participants who were SMEs (4x groups in Southern England (x2) and Scotland (x2) including Deep Rural Sellers – 16 respondents in total)

LOCATION

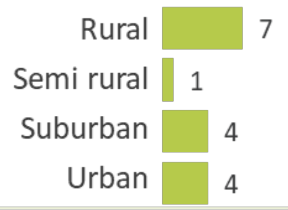


Chart shows most SME respondents slightly more concentrated in rural areas (7) than suburban (4) and urban (4) areas

SIZE OF PARCELS SENT

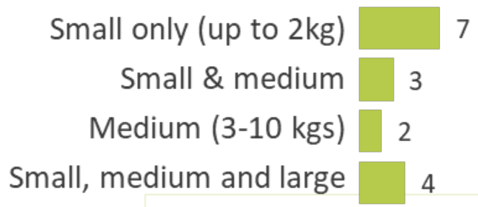


Chart shows SME respondents send a range of size of parcels, with a slight concentration (7) at the smaller end of up to 2kgs

HOW OFTEN SELL VIA MARKETPLACE

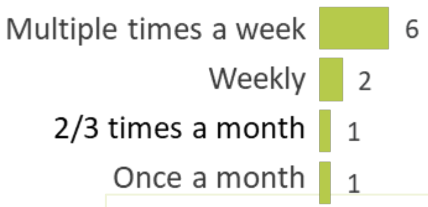


Chart shows SME respondents tend to sent parcels frequently with 6 sending multiple times a week

NO. PARCELS SENT IN LAST 3 MONTHS

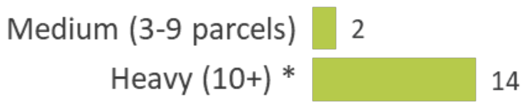


Chart shows most SME respondents are heavy senders of parcels with 14 sending 10+ times a week *(NB deep rural sellers are very heavy senders 100+ parcels a week)*

OPERATORS USED MOST OFTEN

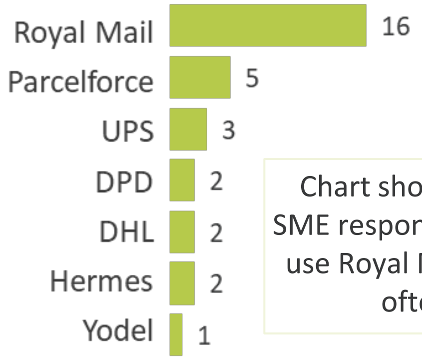


Chart shows most SME respondents (16) use Royal Mail most often

OPERATORS USED OCCASIONALLY

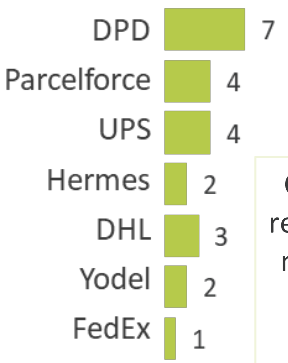
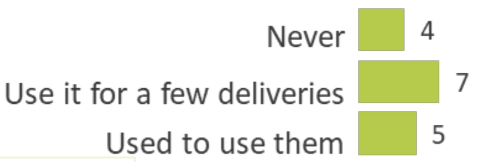


Chart shows SME respondents (7) are more likely to use DPD occasionally than other providers

USE OF PCWs



Charts shows more SME respondents (7) have used PCWs for a few deliveries (more than never used (4) and used to use (5))

WHERE SELLING TAKES PLACE

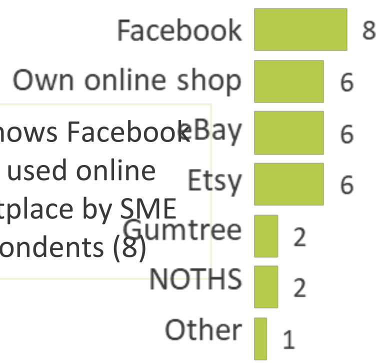


Chart shows Facebook most used online marketplace by SME respondents (8)

(Qualitative slide

Group composition structure

This chart shows a table with the breakdown of the sample by type of sender, habitat, age and location. Sample comprised social senders, casual sellers, hobby sellers, SME online marketplace sellers, SME non-marketplace sellers and deep rural sellers. These respondents were aged 20-70, and came from urban, suburban, semi-rural, rural and deep-rural locations. The sample covered the four nations – England, Scotland, Wales and Northern Ireland.

Seg	Habitat	Age	Location
Social Senders	Urban/Suburban	20-50	Northern Ireland
Social Senders	Rural/Semi-rural	40-70	England
Social Senders + Casual Sellers	Mix of urban/suburban and rural/semi-rural	20-70	Wales
Semi Professional Hobby Sellers	Mix of urban/suburban and rural/semi-rural	20-70	Scotland
SME Online Marketplace Sellers	Urban/Suburban	40-70	England
SME Non-Marketplace Seller	Mix of urban/suburban and rural/semi-rural	20-70	England
Deep Rural Sellers	Deep rural – Postcode provided	20-70	Mix of Scotland/England/Wales
SME Online Marketplace Sellers	Rural/Semi-rural	20-50	Scotland

(Qualitative slide

Depth interview structure

This chart shows a table with the breakdown of the sample by type of vulnerability, habitat, household income, age, gender and location. Sample comprised those with physical access needs, other types of access needs, the digitally excluded and those from deep rural areas. Five depth interviews were among low-income households, and five among those aged 74+. There is a mix of gender. The sample covered the four nations – England, Scotland, Wales and Northern Ireland – and specifically deep rural locations in Devon/Cornwall, Norfolk, Scotland and Wales.

Primary seg	Habitat	Household Income	Age	Gender	Area
Physical Access Needs	Any	Low Income	74+	M	Wales
Physical Access Needs	Any	Low Income	74+	F	Scotland
Physical Access Needs	Any			M	N Ireland
Other Types of Access Needs	Any		74+	F	Northern England
Other Types of Access Needs	Any	Low Income		M	Southern England
Other Types of Access Needs	Any			F	Wales - Rural/Semi-rural
Digitally Excluded	Any		74+	M	Scotland - Urban/Suburban
Digitally Excluded	Any	Low Income	74+	F	N Ireland - Rural/Semi-rural
Digitally Excluded	Any			M	Northern England
Digitally Excluded	Any	Low Income		F	Southern England
Deep rural	Rural			M	Devon/Cornwall
Deep rural	Rural			F	Norfolk
Deep rural	Rural			M	Scotland – Very rural
Deep rural	Rural			F	Scotland – Very rural
Deep rural	Rural			M	Wales postcode - Rural