

Ofcom Residential Postal Tracker

Technical Report Q3 2021 – Q2 2022

A. Preface

Ofcom is the regulator for the UK communications industries, with responsibilities across television, radio, video-on-demand, telecommunications, wireless and postal communications. Ofcom regularly carries out research into these markets to stay informed on new technology developments and the impact that they might have on the sectors they regulate.

Ofcom's Residential Postal Tracker is a continuous tracking study that measures opinion, usage and attitudes to postal services among UK adults. The Residential Postal Tracker began in 2012 where interviewing was conducted using a purely face-to-face methodology. Between January 2016 and December 2019, data was collected using a combined methodological approach: face-to-face interviews conducted using random probability sampling and online interviews using quota sampling. The data from both methodologies were then combined and weighted to nationally representative proportions in terms of age, gender, ethnicity, country and socio-economic group (SEG), and then a further 'evaluative' weight was introduced to account for a 'positivity bias'.

From January 2020, Jigsaw Research Limited was commissioned to review and manage the study moving forward. After a thorough review in consultation with Ofcom, a small number of changes were made throughout the questionnaire to improve its readability for the participant and user of the research. Jigsaw Research Limited continued with a combined online and face-to-face methodological approach as per previous years however the decision was taken to adjust the quota and weighting scheme to better represent the UK moving forward.

A.1. Covid-19 Impact

Due to the Covid-19 pandemic we were unable to collect a representative sample of face-to-face interviews from March 2020 onwards. To ensure that any trend data within this publication is comparable, we have published data for the Online methodology only.

Since online methodologies tend to underrepresent low/non internet users we conducted a separate CATI survey in November 2021 to ensure that these groups had the opportunity to express their views. This additional CATI survey achieved 250 completed interviews with data weighted by gender, age, nation and internet usage to reflect proportions of low/non internet users found in Ofcom's 2019 PSB study.

We continue to review the ability to conduct face-to-face interviews with a view to continue this methodology in the future.

A.2. Q3 2021 – Q2 2022 Data Table Summary

The data tables published includes 5,161 users of the postal service who participated in the Residential Postal Tracker online survey between July 2021 – June 2022. Results were then weighted to correct for over-representation of devolved nations and urbanity within nation. We also applied weights for age, gender, working status and government region to ensure we created a representative UK sample.

Details of the sample design, research methodologies and weighting procedures are outlined in the following pages. A note on statistical reliability is also included.

B. Sample Design

B.1. Online Interviewing

Jigsaw Research adopted a quota sample approach to online interviewing to ensure that the sample was representative of UK adults. Due to the continuous nature of the research, monthly targets are imposed to ensure a representative spread of interviews throughout the quarter. The sample frame was developed at a UK level covering the following key subgroups:

- Gender
- Age (16-24, 25-44, 45-64, 65-74, 75+)
- Socio-economic group (AB/C1/C2/DE)
- Gov Region

Additional targets were applied for urbanity (Urban, Rural, Remote Rural) within Northern Ireland, Wales and Scotland but these were applied on a 'best efforts' basis as they are not as easily targetable through online panel sample.

Jigsaw Research also applied an additional target for Highlands and Islands of Scotland, again this was applied on a 'best efforts' basis.

| | Monthly target | Quarterly target |
|---------------------------------|----------------|------------------|
| Male | 196 | 588 |
| Female | 204 | 612 |
| 16 – 24 year olds | 54 | 162 |
| 25-44 year olds | 129 | 388 |
| 45-64 year olds | 127 | 382 |
| 65-74 year olds | 49 | 148 |
| 75+ | 40 | 121 |
| AB | 88 | 264 |
| C1 | 124 | 372 |
| C2 | 84 | 252 |
| DE | 104 | 312 |
| North East | 22 | 67 |
| North West | 22 | 67 |
| Yorks/Humberside | 22 | 67 |
| East Mids | 22 | 67 |
| West Mids | 22 | 67 |
| East Anglia/East of England | 22 | 67 |
| London | 22 | 67 |
| South East | 22 | 67 |
| South West | 22 | 67 |
| Northern Ireland – urban | 22 | 67 |
| Northern Ireland – rural | 14 | 43 |
| Northern Ireland – remote rural | 17 | 50 |
| Wales – urban | 22 | 67 |
| Wales – rural | 22 | 67 |
| Wales – remote rural | 22 | 67 |
| Scotland – urban | 22 | 67 |
| Scotland – Rural | 22 | 67 |

| | | |
|---------------------------------|----|----|
| Scotland - remote rural | 22 | 67 |
| Highlands & Islands of Scotland | 13 | 39 |

B.2. Face to Face Interviewing¹

Jigsaw Research originally adopted a random location interviewing (RLI) approach to face to face interviewing alongside our online interviews. However, due to the Covid-19 pandemic fieldwork was stopped during March 2020. Ofcom continue to reassess the ability to return to face to face interviewing in the future.

¹ Face to Face interviewing was paused due to the Covid-19 pandemic with this table set only referring to the online methodology.

C. Data Quality

Upon review of existing data prior to 2020, Jigsaw Research in combination with Ofcom implemented an additional data quality process (beyond survey speed checks and verbatim analysis) to ensure that participants had provided considered responses to the survey.

Questions of particular focus included:

- QD1 – The volume of post sent
- QD4 – The amount spent on sending post
- QE1 – The volume of post received
- QF2 and QF3 – The price of a 1st Class or 2nd Class stamp

Upon review of data from these questions we developed rules that would identify participants who provided non-sensical or extreme answers. Namely these rules are:

- Providing too high a spend for no post being sent (spent over £20 in the last month but have not sent any post)
- Providing too low a spend for the amount of post being sent (spent under £1 but sent over 21 pieces of post, spent £1-£2 but sent over 31 pieces of post, spent £2-£4 but sent over 41 pieces of post, spent £4-£6 but sent over 51 pieces of post, spent £6-£40 but sent over 101 pieces of post, spent £40-£50 but sent over 200 pieces of post)
- Received more than 200 pieces of post in the last week
- Provided a 1st class price less than a 2nd class price AND provided an outlier answer of over £5 for either 1st or 2nd class

This set of rules removed 1.5% of the total data provided to date (*roughly c.20 people per quarter of data*). These rules have now been applied to all historic data and will be actioned for future quarters of data.

D. Weighting

At the analysis stage, data is rolled up into 4 quarters of the year. Both online and offline (Face to Face) methodologies are combined into one dataset. We then conduct weighting to correct for skews in regions and where we have set specific quota targets, aligning the data to the known UK profile. With a combined online and offline dataset we were able to develop a detailed interlocked weighting scheme with interlocked gender and age within nation. For this dataset we only have an online sample and applying this detailed interlocking scheme resulted in very high weighting coefficients. Therefore, we have removed the conditions of interlocked gender and age within nation but seek to return to this method when face to face interviewing resumes.

D.1. Demographic weights

The data was weighted within each nation by gender and urbanity. We also include weights for age, region and working status at a total UK level. Rim weights were applied using targets from the 2011 Census, UK Geographics measure of Urbanity and the Labour Force Survey.

The initial unweighted sample and the weighted sample profiles are illustrated below:

| Category | England | | NI | | Wales | | Scotland | |
|---------------------------------------|------------|----------|------------|----------|------------|----------|------------|----------|
| | Unweighted | Weighted | Unweighted | Weighted | Unweighted | Weighted | Unweighted | Weighted |
| Male | 48% | 49% | 45% | 49% | 49% | 49% | 47% | 48% |
| Female | 52% | 51% | 55% | 51% | 50% | 51% | 53% | 52% |
| Gender not listed or specified | 0.4% | 0.4% | - | - | 0.1% | 0% | 0% | 0% |
| | | | | | | | | |
| Urban | 86% | 87% | 56% | 70% | 42% | 76% | 47% | 83% |
| Rural | 13% | 13% | 44% | 30% | 58% | 24% | 53% | 17% |

| Category | UK | |
|-----------------------------|------------|----------|
| | Unweighted | Weighted |
| 16-24 | 12% | 13% |
| 25-44 | 32% | 33% |
| 45-64 | 34% | 31% |
| 65-74 | 15% | 12% |
| 75+ | 9% | 10% |
| | | |
| North East | 5% | 4% |
| North West | 6% | 11% |
| Yorkshire/Humberside | 5% | 8% |

| | | |
|------------------------------|-----|-----|
| East Midlands | 5% | 7% |
| West Midlands | 6% | 9% |
| East Anglia/ East of England | 5% | 9% |
| London / Greater London | 6% | 13% |
| South East | 6% | 14% |
| South West | 6% | 9% |
| Scotland | 21% | 8% |
| Wales | 18% | 5% |
| Northern Ireland | 13% | 3% |
| | | |
| Working | 51% | 60% |
| Not working | 47% | 39% |

E. Statistical reliability and significance

E.1. Effective sample size

This section details the variation between the sample results and the “true” values, or the findings that would have been obtained with a census approach. The confidence with which we can make this prediction is usually chosen to be 95%: that is, the chances are 95 in 100 that the “true” values will fall within a specified range. However, as the sample is weighted, we need to use the effective sample size (ESS) rather than actual sample size to judge the accuracy of results.

The following table compares ESS and actual samples for some of the main analysis groups:

| Category | Sub-group | Actual online interviews achieved | Effective sample size (ESS) |
|----------|------------------|-----------------------------------|-----------------------------|
| Nation | England | 2539 | 2096 |
| | Scotland | 1068 | 509 |
| | Wales | 908 | 434 |
| | Northern Ireland | 646 | 404 |
| | | | |
| Gender | Male | 2463 | 1337 |
| | Female | 2682 | 1445 |
| | | | |
| Age | 16-24 | 603 | 342 |
| | 25-34 | 596 | 346 |
| | 35-44 | 1010 | 571 |
| | 45-54 | 717 | 398 |
| | 55-64 | 1009 | 533 |
| | 65-74 | 752 | 346 |
| | 75+ | 474 | 266 |
| | | | |
| SEG | AB | 1303 | 542 |
| | C1 | 1558 | 881 |
| | C2 | 1044 | 612 |
| | DE | 1256 | 759 |

E.2. Confidence interval

The table below illustrates the required ranges for different sample sizes and percentage results at the “95% confidence interval”:

| Effective sample size | 10% or 90% ± | 20% or 80% ± | 30% or 70% ± | 40% or 60% ± | 50% ± |
|------------------------|-----------------|-----------------|-----------------|-----------------|----------|
| 2,793 (Total) | 1.11% | 1.48% | 1.70% | 1.82% | 1.85% |
| 2,096 (England) | 1.28% | 1.71% | 1.96% | 2.10% | 2.14% |
| 1,337 (Male) | 1.61% | 2.14% | 2.46% | 2.63% | 2.68% |
| 509 (Scotland) | 2.46% | 3.29% | 3.77% | 4.03% | 4.11% |

For example, if 30% or 70% of a sample of 2,793 gives a particular answer, the chances are 95 in 100 that the “true” value will fall within the range of +/- 1.70 percentage points from the sample results.

E.3. Significant differences

When results are compared between separate groups within a sample, different results may be obtained. The difference may be “real”, or it may occur by chance (because not everyone has been interviewed). To test if the difference is a real one – i.e. if it is “statistically significant” – we again have to know the size of the samples, the percentages giving a certain answer and the degree of confidence chosen.

If we assume “95% confidence interval”, the difference between two sample results must be greater than the values given in the table below to be significant:

| Effective Sample sizes being compared | 10% or 90% ± | 20% or 80% ± | 30% or 70% ± | 40% or 60% ± | 50% ± |
|---|-----------------|-----------------|-----------------|-----------------|----------|
| 1,337 vs 1,445 Male vs Female | 2.4% | 3.1% | 3.5% | 3.7% | 3.7% |
| 342 vs 266 16-24 vs 75+ | 5.3% | 6.7% | 7.6% | 8.0% | 8.0% |

For example, comparing a score of 12% for Males and 15% for Females, the scores will need to be at least 2.4% different (using the table) to indicate a significant difference.