

RESEARCH & INTELLIGENCE

Consumer survey research on post

Produced by: Yonder Consulting

Fieldwork: 26th October 2023 to 2nd November 2023

Sample

- 2,024 adults aged 16+ in the UK
- Quotas set on region, gender, age, and working status using. Targets for quotas and weights are taken from the PAMCO audience measurement survey, a random probability F2F survey conducted annually with 35,000 adults.

Data collection

- Online interviews
- Conducted by Yonder Consulting
- Fieldwork from 26th October 2023 to 2nd November 2023

Data reporting

- Weighted to be nationally representative of the UK
- Data available in pdf tables (aggregated), SPSS and CSV (respondent level)
- Significance testing applied at the 95% confidence level

Summary of key findings

Figures from 2023 confirm the continued importance of the postal service, and its key features

- Around 8 in 10 believe they will always need to use the postal service, while a minority (31%) expect to use Royal Mail's competitors more in the future.
- Significant minorities (around 4 in 10) would feel cut off from society if they were not able to send or receive *letters* and *parcels* almost every day.
- There continues to be majority agreement (66%) with the idea of universal pricing.
- All postal service features we measured for both *letters* and *parcels* continue to be considered 'important' by a majority of service users; affordability continues to be the most important feature, considered so by around 9 in 10 users.

However, there have been some shifts in user priorities/perceptions since similar research was conducted in 2020

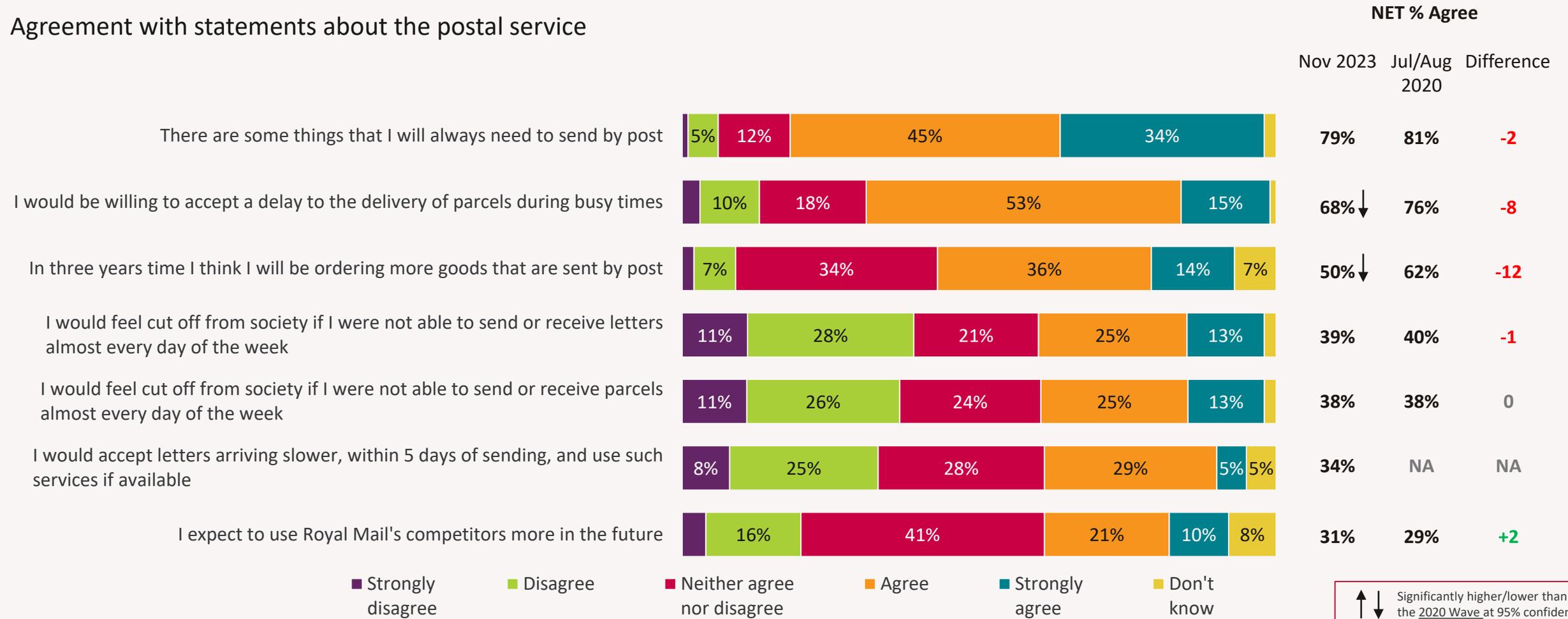
- There has been a decrease (62% to 50%) in the proportion of users who think they will be ordering more goods sent by post in three years' time, and fewer respondents (76% to 68%) are willing to accept delivery delays of *parcels* during busy times. These findings are likely attributed, at least in part, to changing mentalities post-pandemic.
- Likewise, the importance of delivery 6-days-a-week and Saturday deliveries of both *letters* and *parcels* has also decreased since 2020, while remaining important for the majority of users (around 6 in 10 for both *letters* and *parcels*).
- At the same time, there has been a significant increase since 2020 in the proportion of users who report being *unfavourable* to the idea of centralised pick-up locations for both *letters* and *parcels*, with clear majorities now being against the idea in both cases (increasing from 54% to 57% for parcels and 63% to 70% for letters).

Section 1

Survey Findings

8 in 10 agree that there will always be things they need to send by post and, compared to 2020, fewer would be willing to accept parcel delivery delays

Agreement with statements about the postal service



Source: Ofcom Future of Postal Survey

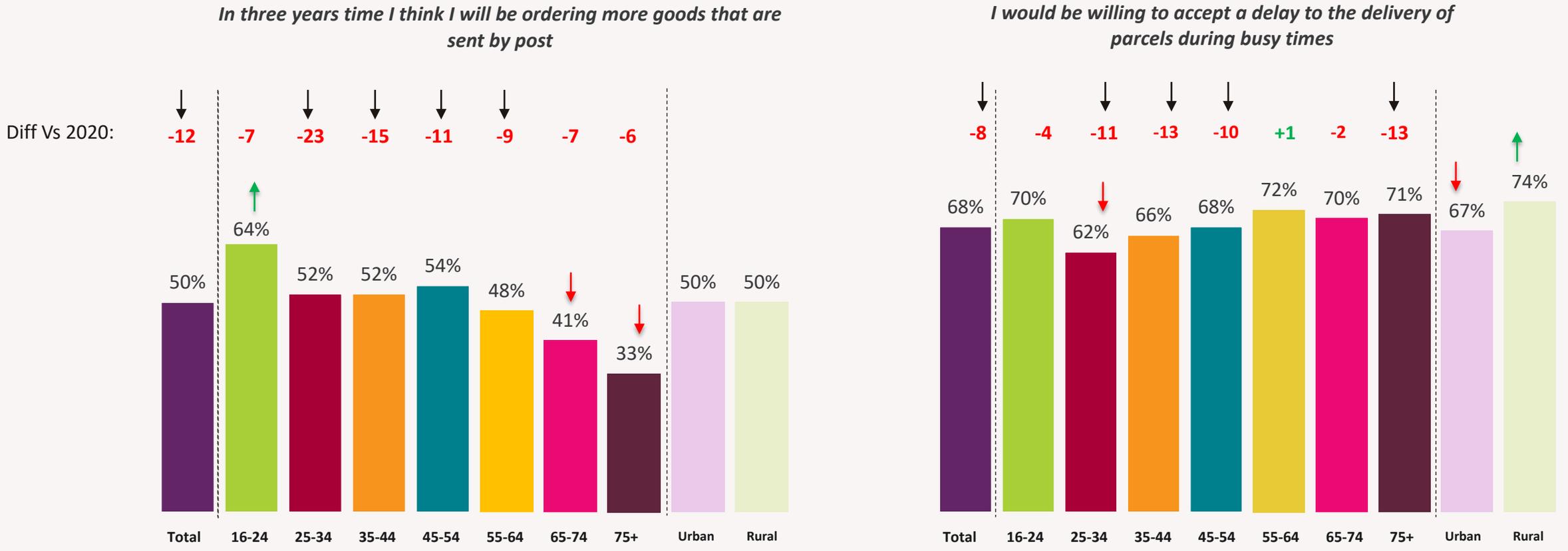
Question: B1. How far do you agree or disagree with the following statements? Base: All respondents: Jul/Aug 2020 (2366), Nov '23 (2024).

N.B. responses ranked on Nov 2023 'Net Agree' %s; data <5% has not been labelled.

Half agree that they will be ordering more goods that are sent by post in three years time

Agreement with statements about the postal service by age and rurality

↑ ↓ Significantly higher/lower than the 2020 Wave at 95% confidence
 ↑ ↓ Significantly higher/lower than the total at 95% confidence

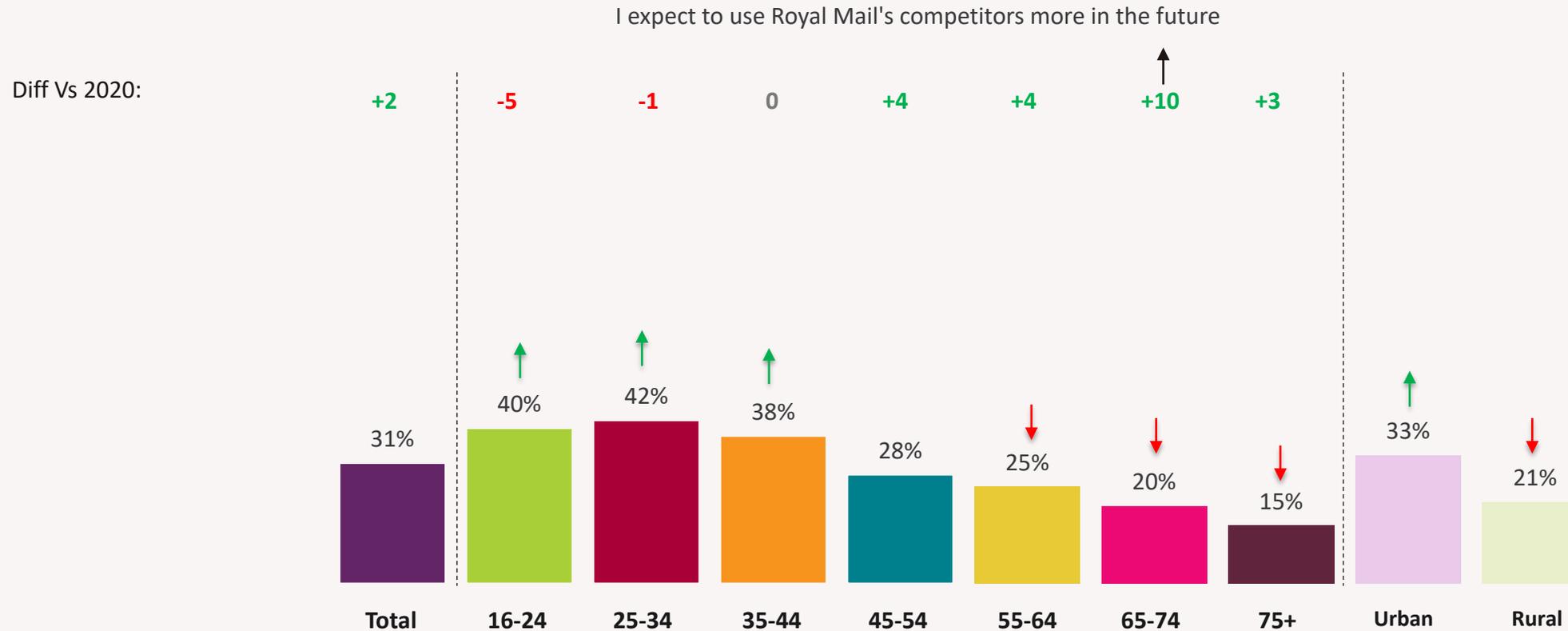


Source: Ofcom Future of Postal Survey

Question: B1. How far do you agree or disagree with the following statements? Base: All respondents: Jul/Aug 2020 (2366), Nov '23 (2024), 16-24 (338/246), 25-34(416/327), 35-44 (383/333), 45-54(408/349), 55-64(367/281), 65-74(254/267), 75+(200/221), Urban (1655*) Rural and Remote Rural (369*) *Rural and Remote Rural figures for 2020 not available

Similar to 2020, under 45s are more likely to consider using Royal mail competitors; meanwhile, consideration amongst 65-74 year-olds has increased

Agreement with statements about the postal service by age and rurality



↑ ↓ Significantly higher/lower than the total at 95% confidence

↑ ↓ Significantly higher/lower than the 2020 Wave at 95% confidence

Source: Ofcom Future of Postal Survey

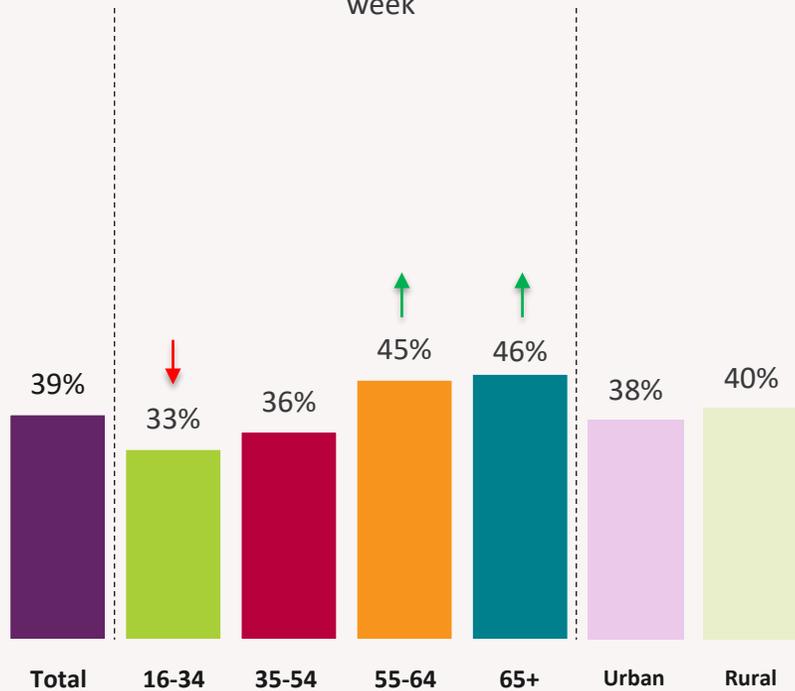
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 *Figures for 2020 not available

Older people are more likely to feel cut off from society if they couldn't send/receive *letters* regularly, while younger people and those in rural areas are more likely to feel cut off if they couldn't send/receive *parcels* regularly

Agreement with statements about the postal service by age

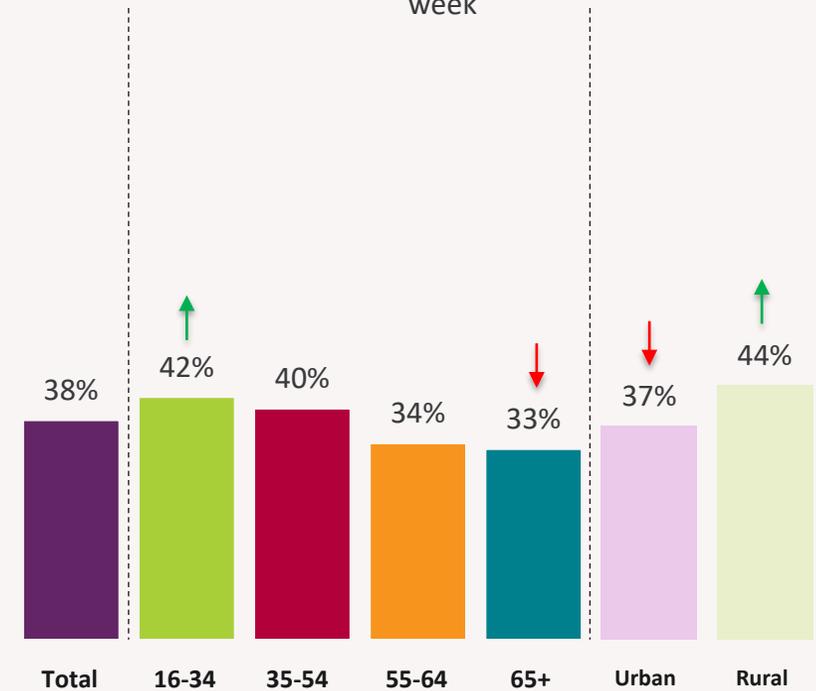
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I would feel cut off from society if I were not able to send or receive **letters** almost every day of the week



For both *letters* and *parcels*, levels of perceived impact remain consistent with 2020

I would feel cut off from society if I were not able to send or receive **parcels** almost every day of the week

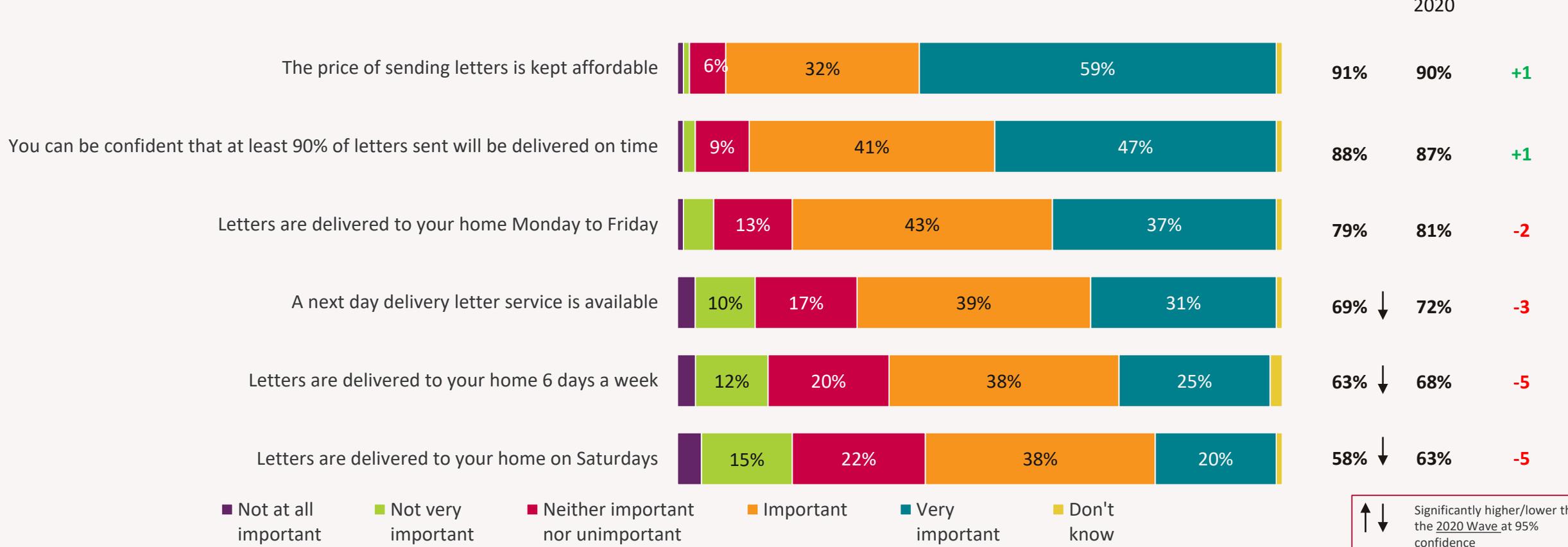


Source: Ofcom Future of Postal Survey

Question: B1. How far do you agree or disagree with the following statements? Base: Nov 2023 Total (2024) | 16-34 (573) 35-54 (682) 55-64 (281) 65+ (488) Urban (1655) Rural and Remote Rural (369)

Affordable pricing of letters remains important to the majority, while the importance of next day delivery, delivery 6 days a week, and Saturday delivery for *letters* has declined since 2020

% Importance of postal service features – Letters, greetings cards and postcards



Source: Ofcom Future of Postal Survey

Question: B2a. Thinking about letters, greetings cards and postcards, how important is it to you that... Base: All respondents: Jul/Aug 2020 (2366). Nov '23 (2024)

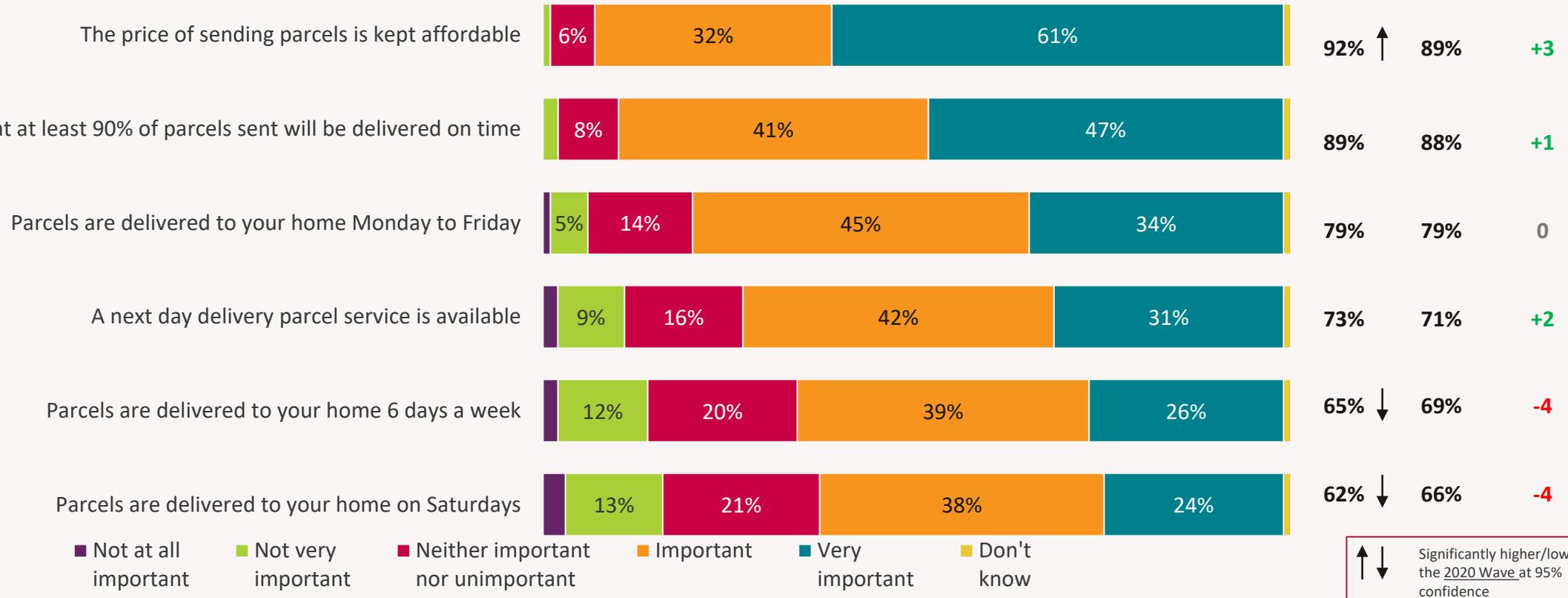
N.B. Data <5% has not been labelled.

Affordable pricing for *parcel* delivery remains high and has increased in importance

% Importance of postal service features - Parcels

NET % Agree

Nov 2023 Jul/Aug 2020 Difference



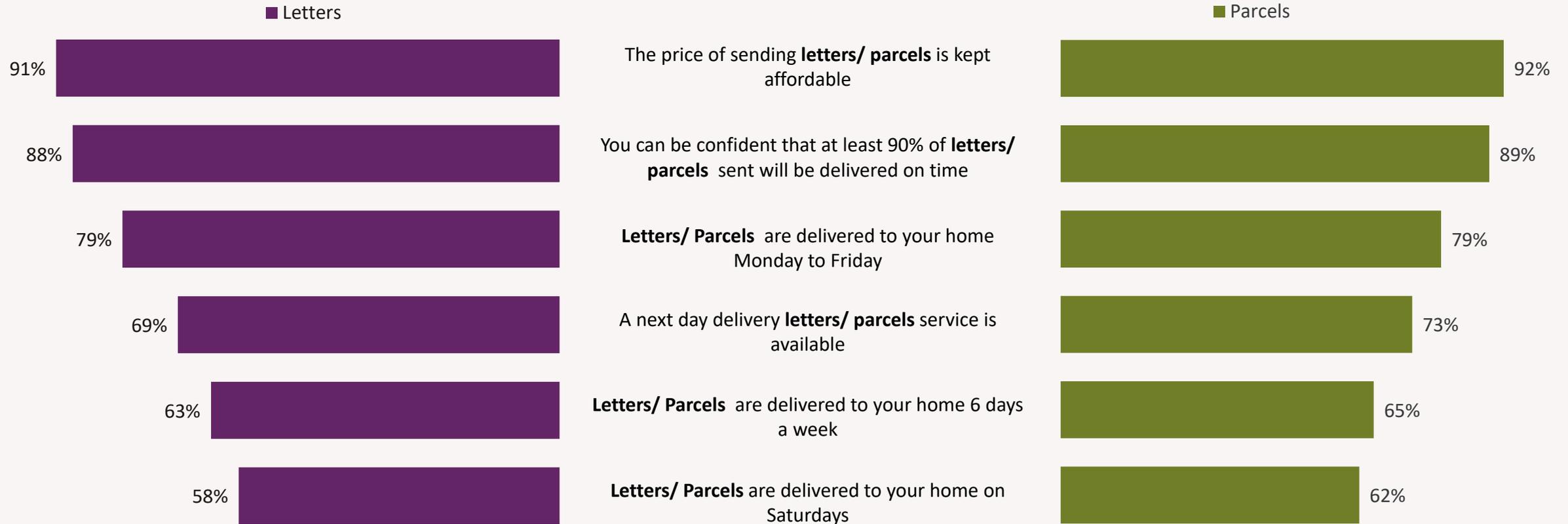
Source: Ofcom Future of Postal Survey

Question: B2B. Thinking about Parcels, how important is it to you that... Base: All respondents: Jul/Aug 2020 (2366). Nov '23 (2024)

N.B. Data <5% has not been labelled.

The stated importance of postal service features is very similar for both *letters* and *parcels*

% Importance of postal service features – *Letter & Parcel* comparison



Source: Where is the data from?

Question: Question: B2A/B. Thinking about Letters/Parcels, how important is it to you that... Base: : All respondents: Nov '23 (2024)

Affordability and on-time delivery of letters and parcels is more important to older people and those who live in rural areas

Importance with statements about the postal service by age

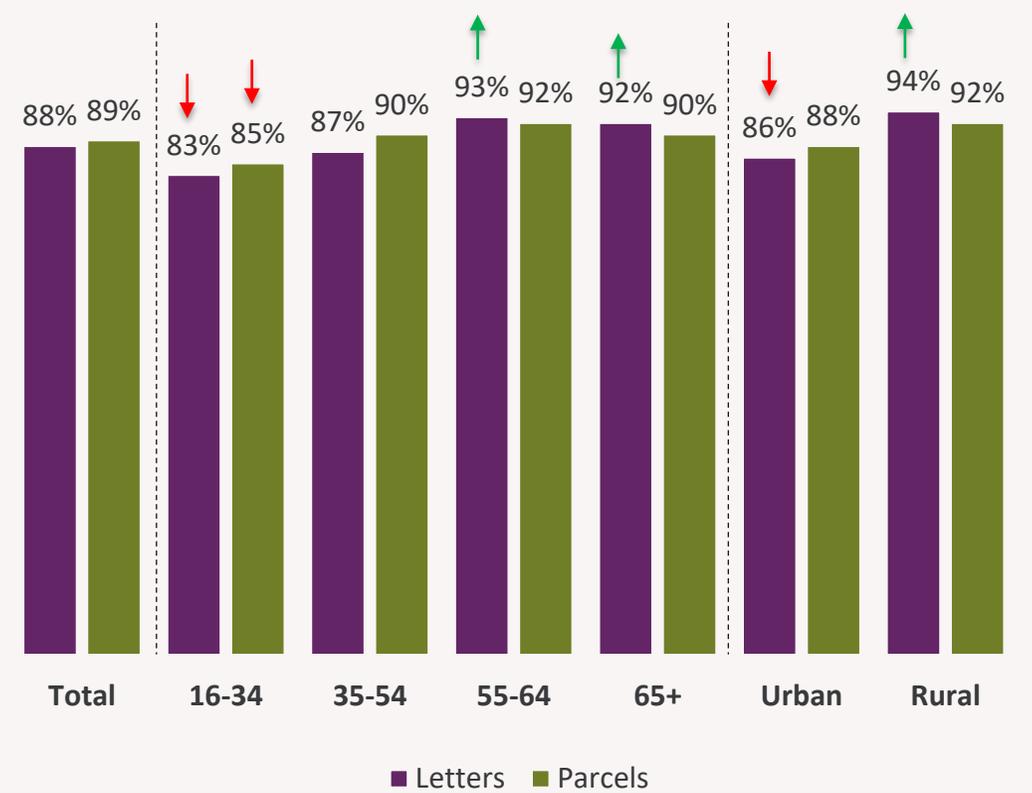


 Significantly higher/lower than the total at 95% confidence

The price of sending **letters/parcels** is kept affordable



You can be confident that at least 90% of **letters/parcels** sent will be delivered on time



Source: Ofcom Future of Postal Survey

Question: B2a & B2b. Thinking about letters, greetings cards and postcard and parcels, how important is it to you that... Base: Nov 2023 Total (2024) | 16-34 (573*) 35-54 (682*) 55-64 (281*) 65+ (488*) Urban (1655*) Rural and Remote Rural (369*)

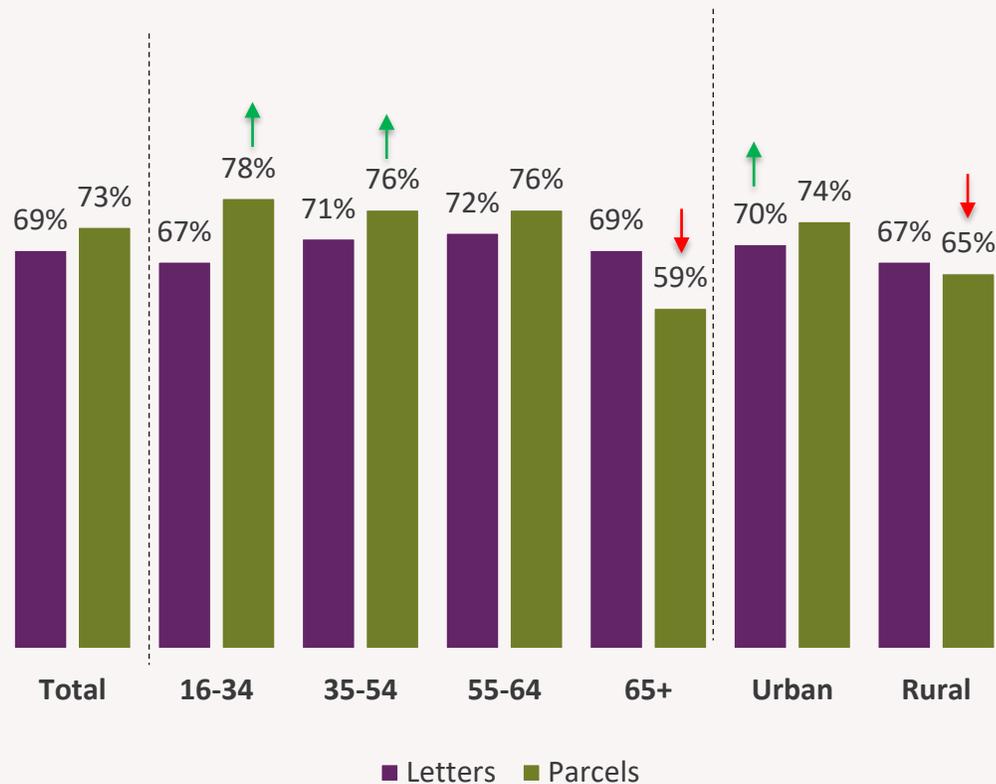
*Figures for 2020 not available for all statements; for consistency only 2023 figures are shown

Next day delivery of *parcels* is more important to under 55s; *parcel* deliveries 6 days a week is more important to 35-64 year olds

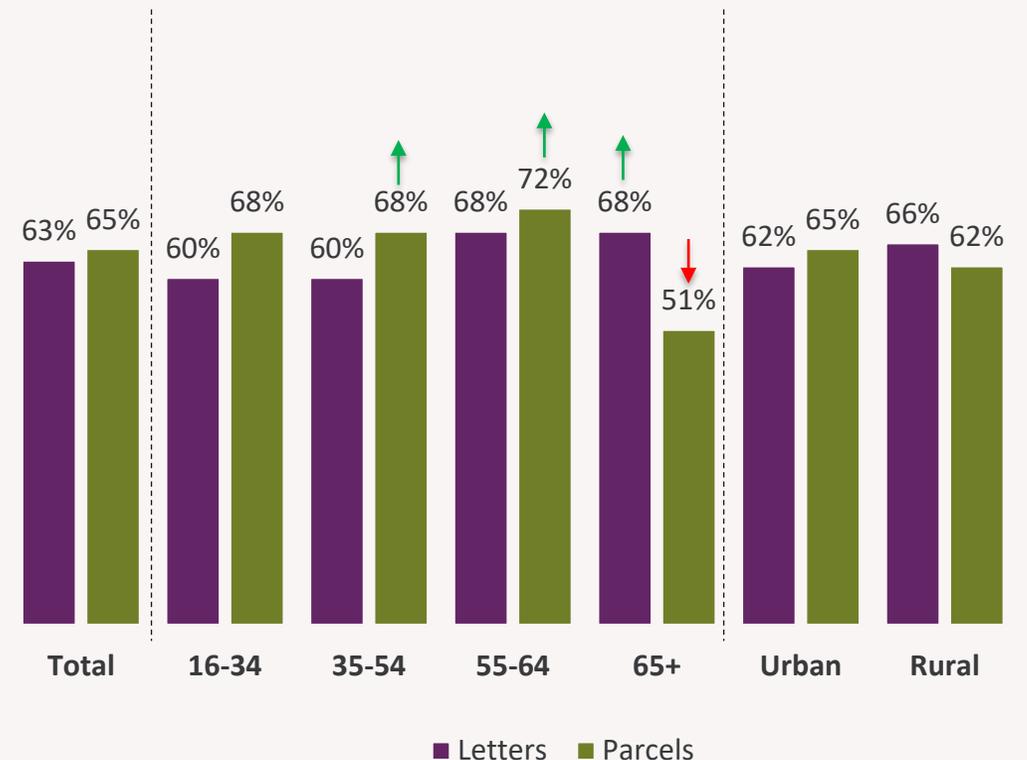
Agreement with statements about the postal service by age

↑ ↓ Significantly higher/lower than the total at 95% confidence

A next day delivery **letter/parcels** service is available



Letters/parcels are delivered to your home 6 days a week



Source: Ofcom Future of Postal Survey

Question: B2a & B2b. Thinking about letters, greetings cards and postcard and parcels, how important is it to you that... Base: Nov 2023 Total (2024) | 16-34 (573*) 35-54 (682*) 55-64 (281*) 65+ (488*) Urban (1655*) Rural and Remote Rural (369*)

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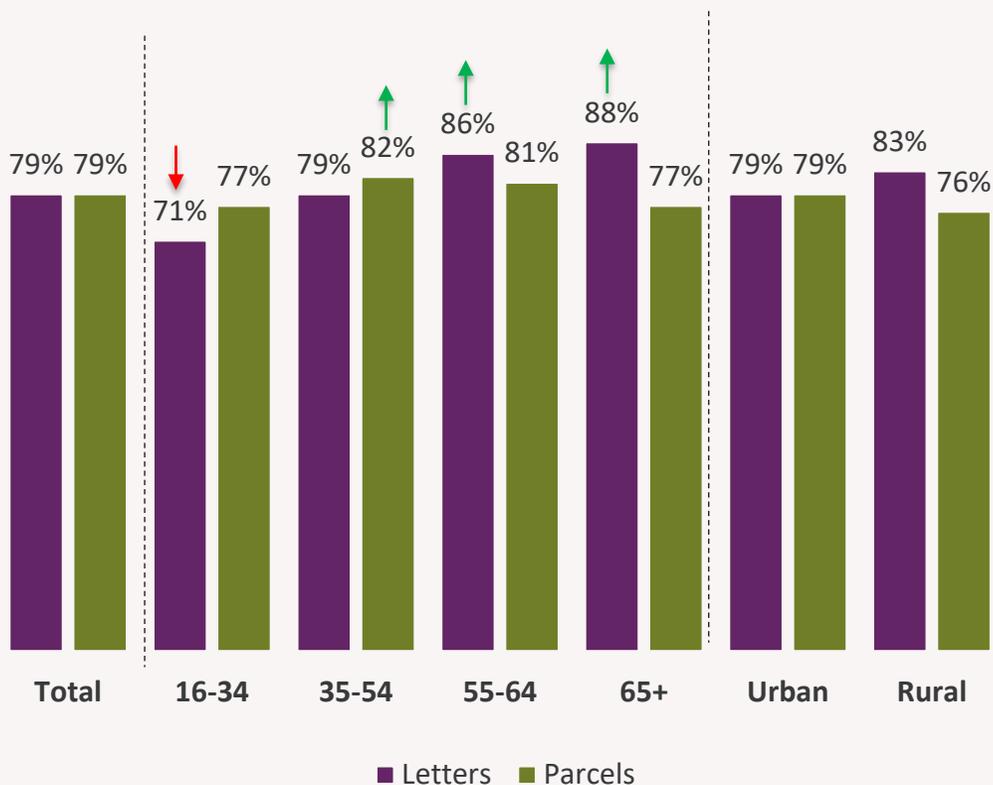
Monday to Friday delivery of *letters* is more important to over 55s, whereas having *parcels* delivered on Saturdays is more important for 16-54s

Agreement with statements about the postal service by age

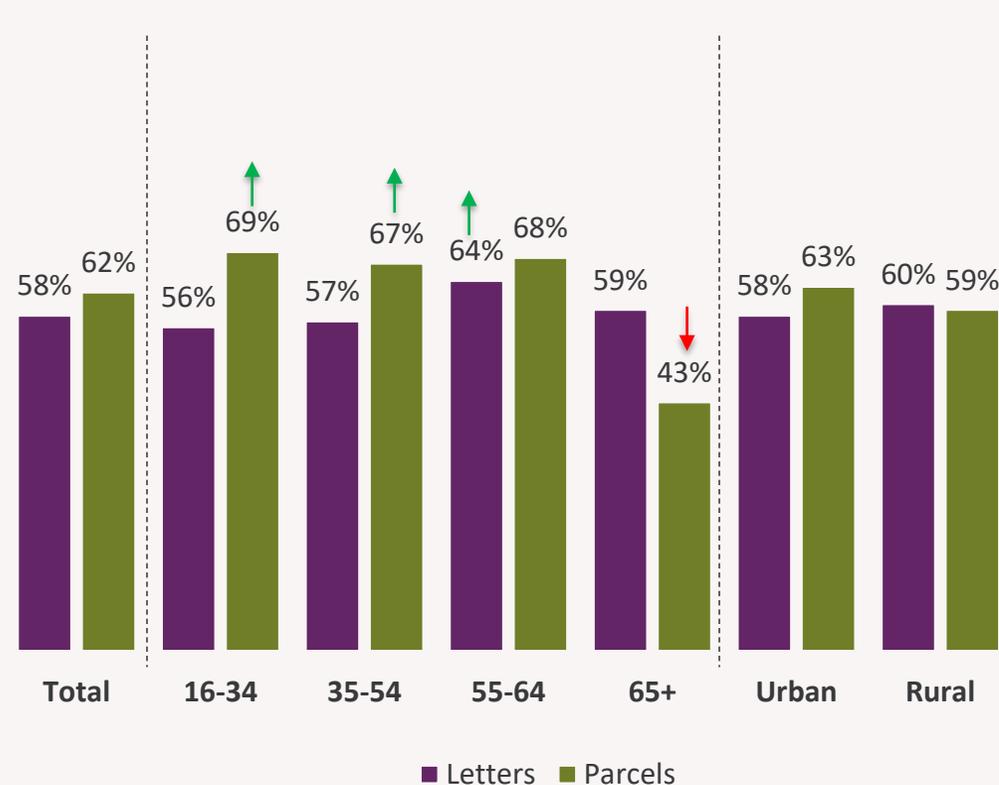


 Significantly higher/lower than the total at 95% confidence

Letters/ Parcels are delivered to your home Monday to Friday



Letters/ Parcels are delivered to your home on Saturdays



Source: Ofcom Future of Postal Survey

Question: B2a & B2b. Thinking about letters, greetings cards and postcard and parcels, how important is it to you that... Base: Nov 2023 Total (2024) | 16-34 (573) 35-54 (682) 55-64 (281) 65+ (488) Urban (1655) Rural and Remote Rural (369)

*Figures for 2020 not available for all statements; for consistency only 2023 figures are shown

A majority remain unfavourable towards the idea of central location pick-ups for letters and parcels, in place of delivery to the door, and significantly more so than in 2020

% in favour of central location pick-ups

NET % Against idea

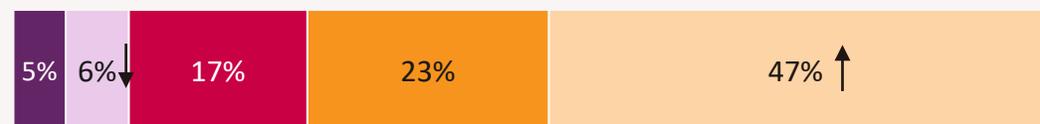
Nov 2023 Jul/Aug 2020 Difference

Instead of **parcels** being delivered to your door, they would be delivered to a secure locker in a central location (e.g. a local post office, shop, petrol station or train station).



57% ↑ 54% +3

Instead of **letters** being delivered to your door, they would be delivered to a secure locker in a central location (e.g. a local post office, shop, petrol station or train station).



70% ↑ 63% +7

■ 5 = Strongly favour idea ■ 4 ■ 3 = Don't mind either way ■ 2 ■ 1 = Strongly against idea ■ Don't know

↑↓ Significantly higher/lower than the 2020 Wave at 95% confidence

Source: Ofcom Future of Postal Survey

Question: B3A/B. Please click on the scale below to indicate how strongly you favour each idea, if at all. Instead of letters/parcels being delivered to your door, they would be delivered to a secure locker in a central location (such as a local post office, shop, petrol station or train station) Base: All respondents: Jul/Aug 2020 (2366). Nov '23 (2024)

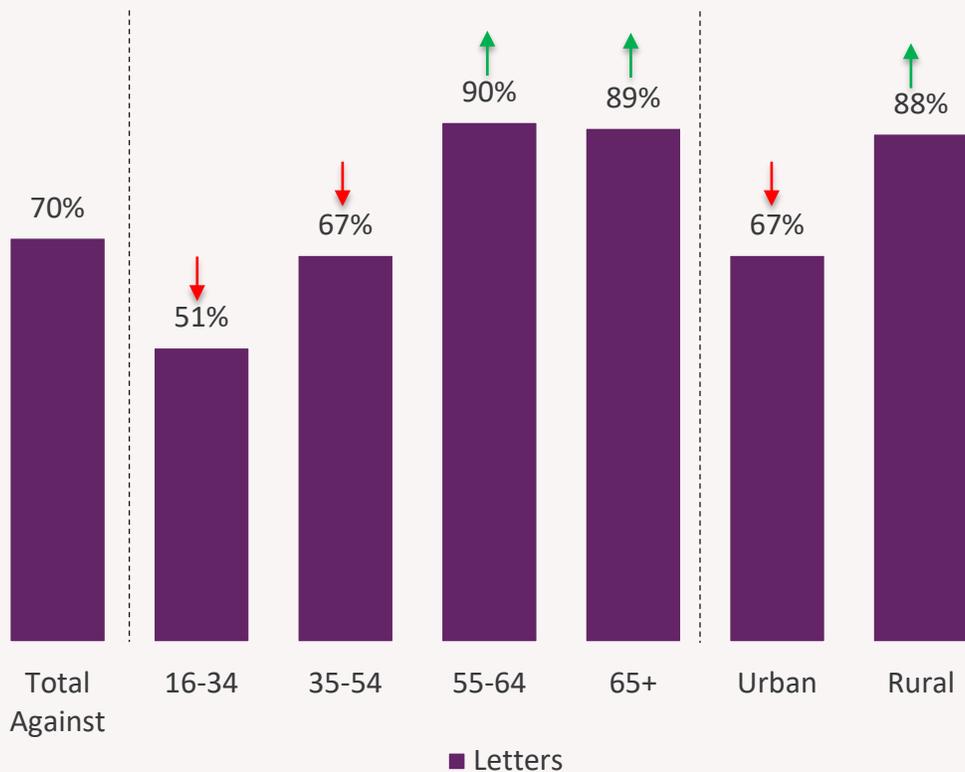
N.B. Data <5% has not been labelled.

Over 55s and those who live in rural areas are less likely to be favourable towards the idea of collecting their post from a centralised location, instead of being delivered to the door.

% Against the idea of lockers for letters and parcels breakdown by age and rurality

↑ ↓ Significantly higher/lower than the average at 95% confidence

The postman/woman would leave your **letters** in the locker for you to come and pick up at a convenient time



The postman/woman would leave your **parcels** in the locker for you to come and pick up at a convenient time



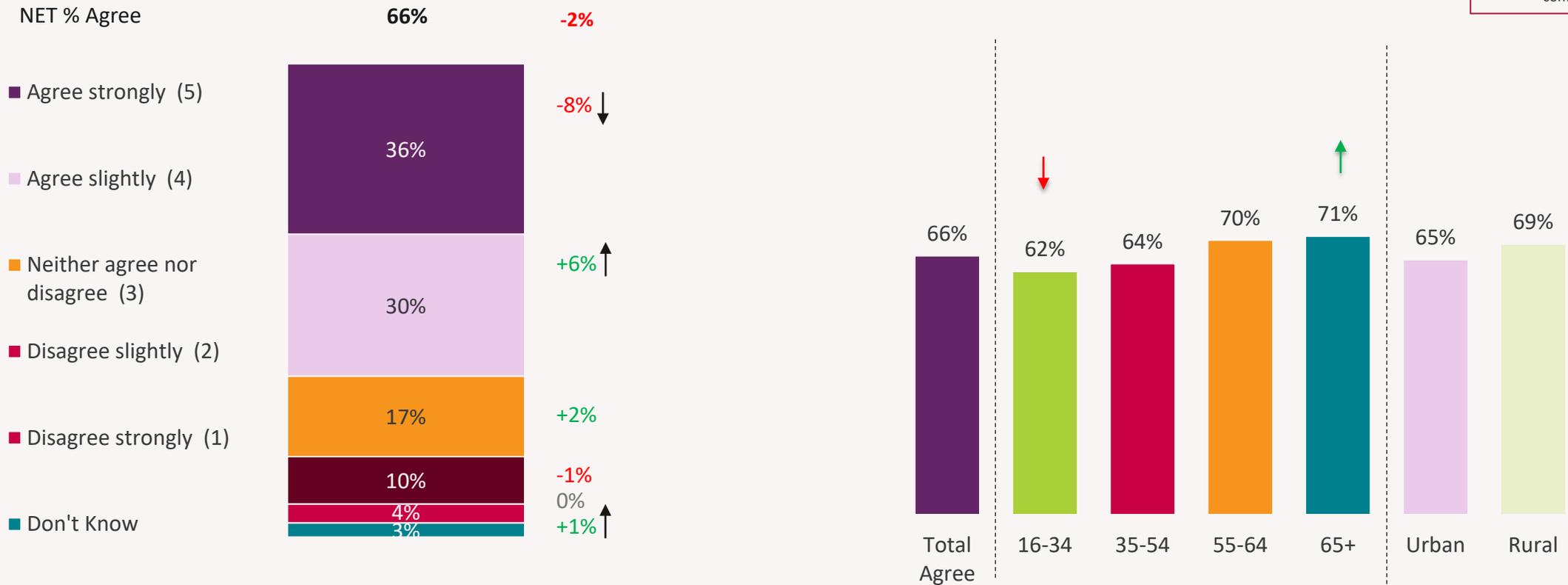
Source: Ofcom Future of Postal Survey

Question: B3A/B. Please click on the scale below to indicate how strongly you favour each idea, if at all. Instead of letters/parcels being delivered to your door, they would be delivered to a secure locker in a central location (such as a local post office, shop, petrol station or train station) Base: Nov 2023 Total (2024) | 16-34 (573*) 35-54 (682*) 55-64 (281*) 65+ (488*) Urban (1655*) Rural and Remote Rural (369*)

*Figures for 2020 not available

In line with 2020, two thirds agree the Royal Mail services should be provided at the same price to all regardless of location in the UK

% Agreement with universal pricing



↑ ↓ Significantly higher/lower than the average at 95% confidence

↑ ↓ Significantly higher/lower than the 2020 Wave at 95% confidence

Source: Ofcom Future of Postal Survey

Question: B4. How strongly do you agree or disagree that Royal Mail should provide its services at the same price to all, regardless of where a letter or parcel is sent within the UK? Base: All respondents: Jul/Aug 2020 (2366). Nov '23 (2024) | 16-34 (573*) 35-54 (682*) 55-64 (281*) 65+ (488*) Urban (1655*) Rural and Remote Rural (369*)

*Figures for 2020 not available

Section 2

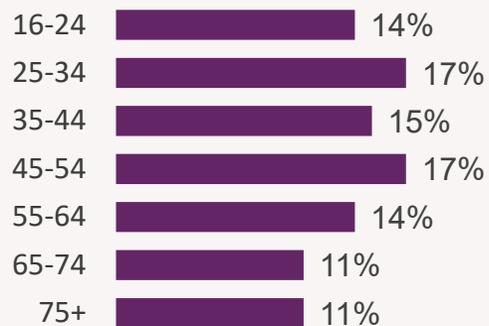
Sample Profile

Sample Profile

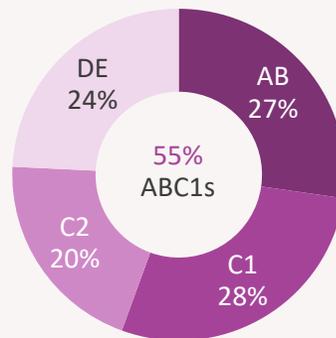
Gender



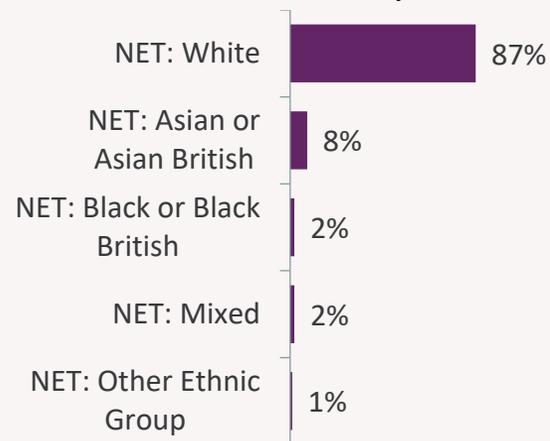
Age



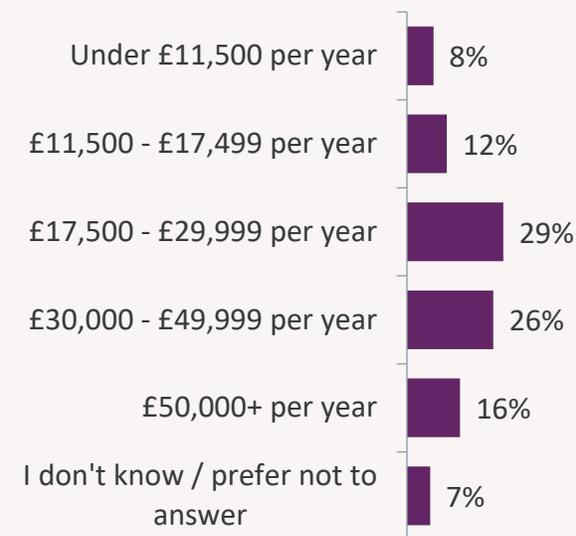
SEG



Ethnicity



Annual Household Income

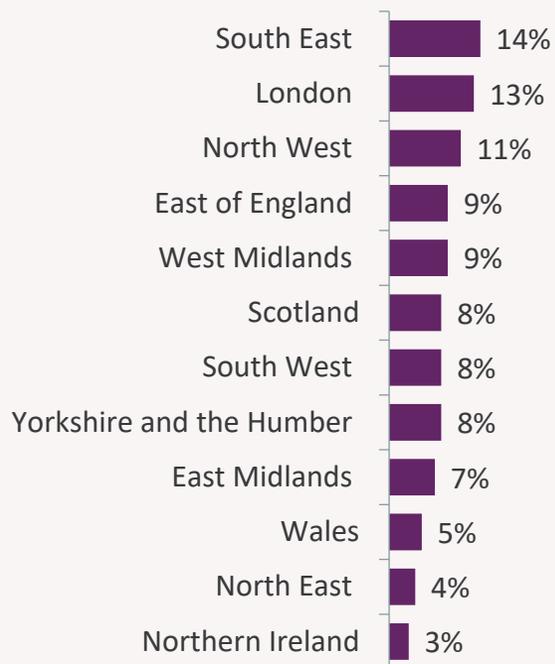


Source: Ofcom Future of Postal Survey

Question: QZ2. Gender QZ1. Age, QZ7. Social Grade, C2. Which of these best describes your ethnicity?, C5. Approximately, what is your annual household income (from all sources, before tax)? Base: All respondents (2024)

Sample Profile

Region



Urban/rural/remote



Source: Ofcom Future of Postal Survey

Question: QZ4. Region. QZ5. Which of these best describes where you live? Base: All respondents (2024)