Measuring user experience of parcel delivery to residential addresses 2023

Fieldwork: January 2023 and July – August 2023

Summary of key findings

1 Overall, most residential parcel recipients are satisfied with their parcel delivery experiences. The average satisfaction score across delivery companies is 78%. Under one in ten (8%) are dissatisfied. Satisfaction levels are similar across urban and rural areas of the UK.

2 Satisfaction with the contact and complaints handling process is lower. When we look at the average satisfaction scores per provider, less than half are satisfied with each of; the contact process (41%), complaint handling (43%) and resolution of issue (47%). Amongst those dissatisfied with the contact process, 55% cited not being able to contact the company by telephone as the reason for their dissatisfaction.

3 Users who said that they had a limiting or impacting condition were more likely to experience problems or issues with a delivery service (73% vs 65% among those who did not report a limiting or impacting condition). Those with limiting/ impacting conditions would like to see improvements, such as having more time to answer the door and being able to send specific instructions in advance of delivery.

4 There are some reported differences in satisfaction scores between experiences with different delivery companies.

Objectives and methodology

This study was conducted in 2023, taking in two waves, firstly in January and then in July and August*.

An online survey was conducted by Yonder Consulting and completed by **4,107 people** aged 16+. This sample was comprised of UK residents who had experience of UK delivery companies in the six months prior to research. All data was weighted to align with the UK population profile on age and gender, region, ethnicity, and social grade to ensure alignment with known proportions occurring naturally within the UK population.

The primary objective of the research was to understand the experience of residential users when receiving parcel deliveries. Specifically, Ofcom sought to:

- Measure the reported quality of service received from different delivery companies;

- Measure the reported satisfaction and experience with different delivery companies when making a complaint (or customer contact);

- Understand the experience of users with impacting/limiting conditions, and the reported quality of service they receive from different delivery companies;

In addition to the primary objective, the research captured the experiences of users with impacting/limiting conditions when <u>sending</u> parcels.

Further details on how the research defined users in urban and rural areas and those with impacting/limiting conditions are set out in Appendix 2. Note that Royal Mail services were affected by strikes in the latter half of 2022 and the first half of 2023 which may have had an impact on the findings.

*NB – the large majority (97%) of the Wave Two interviews were completed between 24-27 July. The remaining interviews were conducted on 21 August to fill sample quotas.

Delivery issues have been grouped for analysis as follows:

NET*: Not delivered on time as expected	NET: Accessibility issues	NET: Courier/transit issues	NET: Lack of information / options
Parcel was not delivered	Parcel collection point was not convenient	Parcel was damaged	Inconvenient options for delivery
Parcel delivery was delayed	I was not given sufficient time to answer the door	Did not attempt to deliver in person (e.g. left 'you were not in' card even when I was at home to collect parcel)	Incorrect or insufficient tracking information
	Parcel left in inaccessible place	Parcel left in inappropriate location	Unable to rearrange the delivery
	I was required to sign a form I could not read	Delivery person was rude or unhelpful	
	The process for selecting a timeslot was not accessible to me	Delivery person did not knock loudly enough or ring the doorbell	
	The process for requesting special delivery instructions was not accessible to me	Parcel was not left in my nominated safe space	
	Parcel delivered to a location that I could not access (e.g. local shop or post office)	Parcel was damaged	

Section 1
Experience of delivery issues

35% of parcel recipients have experienced a delivery delay with at least one company

Experience of issues (Top 10) – **by company (Waves 1 & 2 combined)**

Significantly higher/lower than the <u>average</u> at 95% confidence

	Average across companies	Royal Mail	DHL	DPD	FedEx	Evri	Parcelforce	TNT Express	UPS	Yodel	Amazon	DX Delivery	NET: Any company
NET: Any issues experienced	34%	38%	24%	26%	31%	47%	29%	36%	28%	35%	35%	36%	68%
Parcel delivery was delayed	10%	18%	5%	5%	5%	18%	10%	6%	5%	9%	8%	6%	35%
Parcel left in inappropriate location	6%	3%	4%	4%	3%	13%	3%	4%	3%	7%	10%	5%	22%
Delivery person did not knock loudly enough or ring the doorbell	6%	5%	3%	5%	4%	10%	4%	3%	3%	6%	8%	4%	20%
I was not given sufficient time to answer the door	6%	5%	3%	4%	4%	8%	4%	6%	4%	6%	8%	3%	17%
Parcel was not delivered	5%	6%	3%	4%	3%	11%	3%	4%	2%	5%	4%	3%	20%
Did not attempt to deliver in person	5%	6%	3%	4%	3%	9%	4%	4%	3%	5%	4%	4%	17%
Incorrect or insufficient tracking information	4%	5%	3%	3%	4%	9%	4%	4%	3%	5%	3%	4%	16%
Parcel was damaged	4%	4%	2%	2%	3%	8%	2%	4%	3%	4%	4%	3%	15%
Parcel was not left in my nominated safe space	4%	3%	2%	3%	2%	8%	3%	5%	3%	5%	5%	4%	15%
The process for selecting a timeslot was not accessible to me	4%	4%	3%	4%	5%	5%	4%	5%	4%	4%	3%	7%	9%

Reported experience of *any* issue, and parcels not being delivered on time, improved during 2023

Experience of delivery issues – **NET Any delivery company (Wave 1 v Wave 2)**

| W1 = Darker shading | Significantly higher/lower than |
| W2 = Lighter shading | Jan '23 (W1) at 95% confidence |
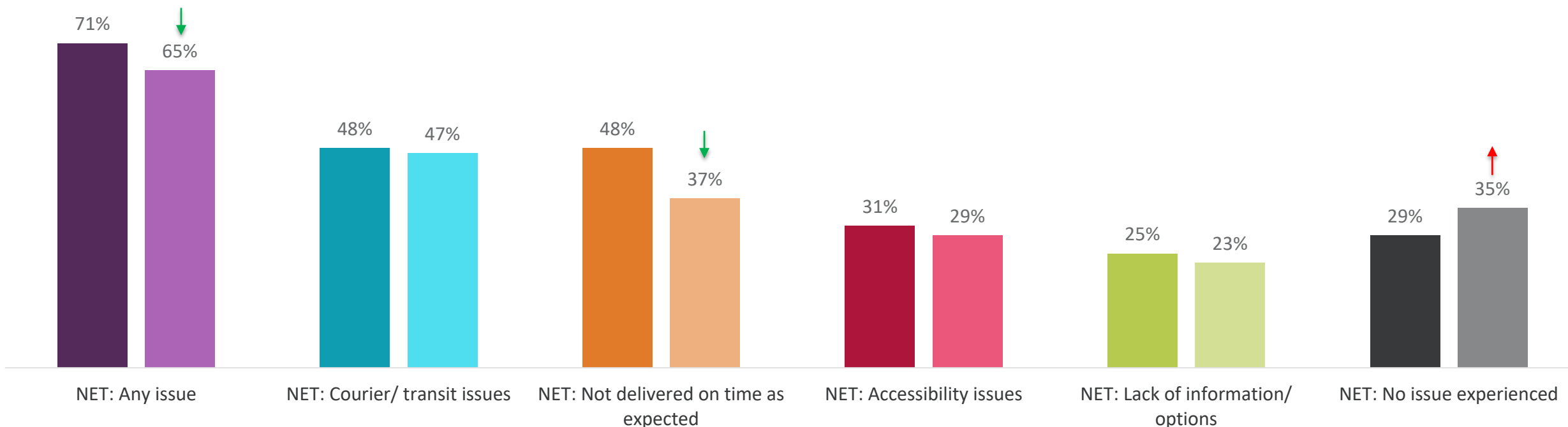
Bar chart values:

- NET: Any issue — 71%, 65%
- NET: Courier/ transit issues — 48%, 47%
- NET: Not delivered on time as expected — 48%, 37%
- NET: Accessibility issues — 31%, 29%
- NET: Lack of information/ options — 25%, 23%
- NET: No issue experienced — 29%, 35%

Parcel deliveries being delayed, and parcels not being delivered are the most common issues for which contact with a delivery company has been made

Issues for which contact was made (Top 10) – **NET: Any (Wave 1 & 2 combined)**
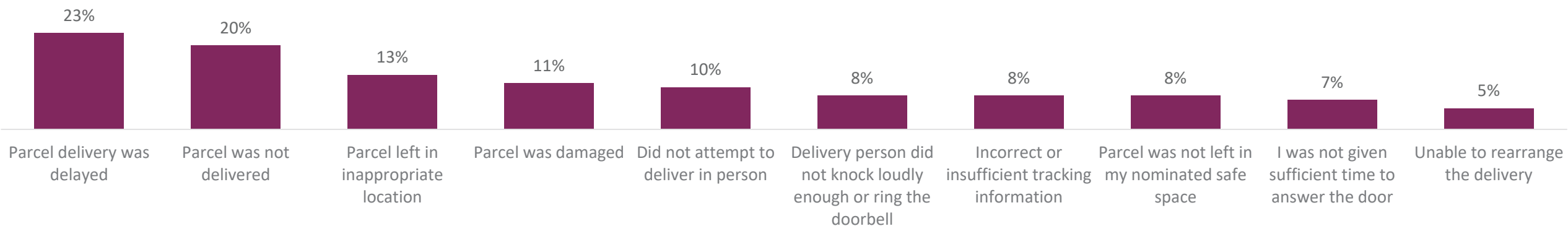
Parcel delivery was delayed	Parcel was not delivered	Parcel left in inappropriate location	Parcel was damaged	Did not attempt to deliver in person	Delivery person did not knock loudly enough or ring the doorbell	Incorrect or insufficient tracking information	Parcel was not left in my nominated safe space	I was not given sufficient time to answer the door	Unable to rearrange the delivery
23%	20%	13%	11%	10%	8%	8%	8%	7%	5%

Section 2
Satisfaction with delivery companies

On average across delivery companies, 78% of recipients were satisfied with the delivery experience overall

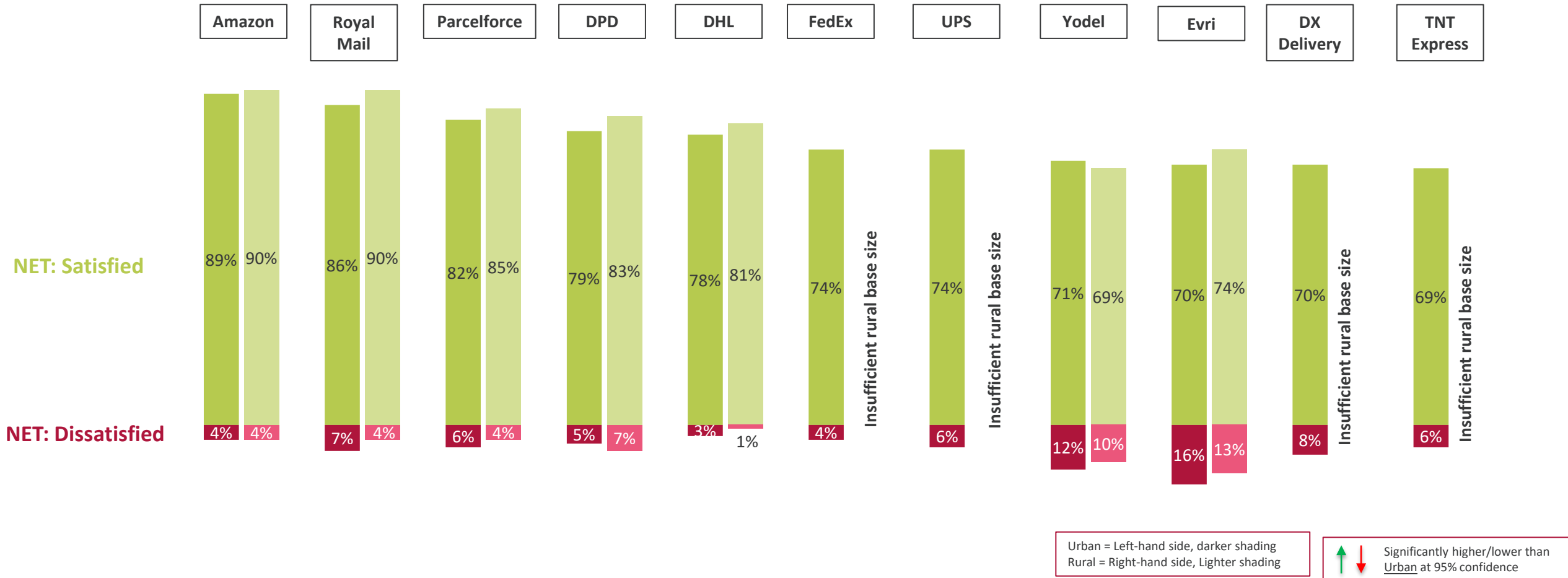Satisfaction and dissatisfaction with delivery companies – **Total (Waves 1 & 2 combined)**
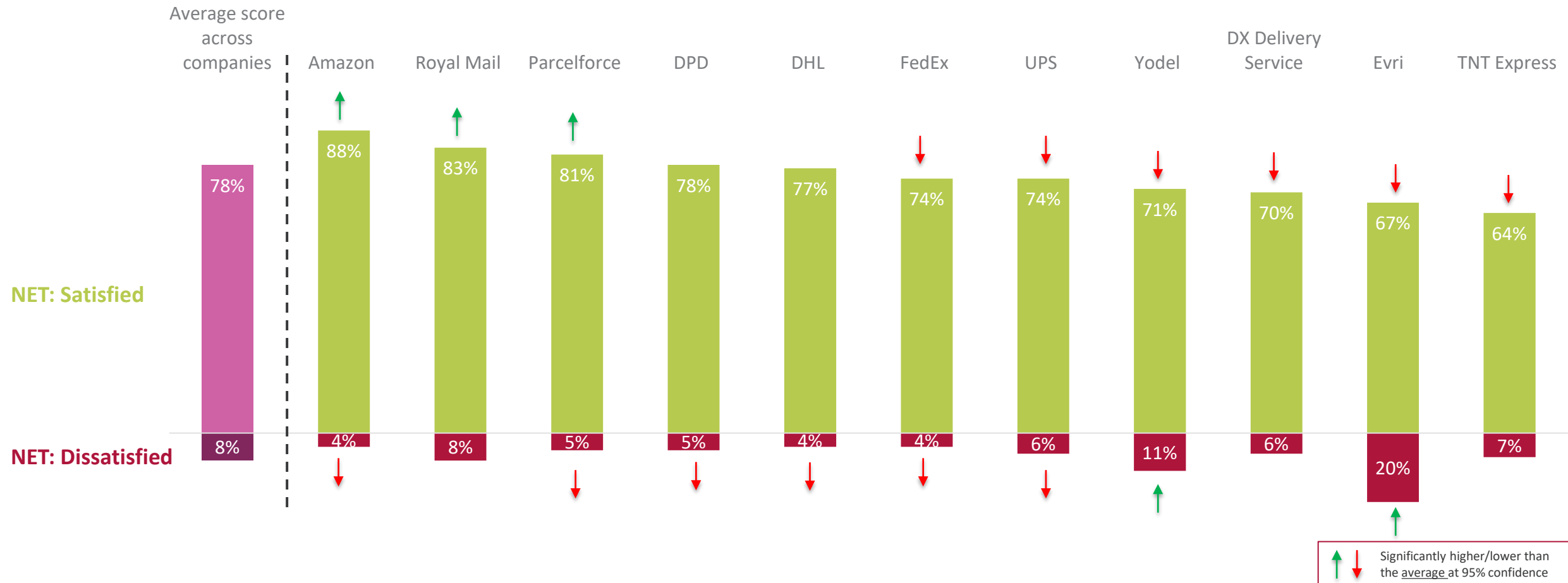
NET: Satisfied

Average score across companies	Amazon	Royal Mail	Parcelforce	DPD	DHL	FedEx	UPS	Yodel	DX Delivery Service	Evri	TNT Express
78%	88%	83%	81%	78%	77%	74%	74%	71%	70%	67%	64%

NET: Dissatisfied

8%	4%	8%	5%	5%	4%	4%	6%	11%	6%	20%	7%

Significantly higher/lower than the average at 95% confidence

Satisfaction with delivery services is similar among urban and rural respondents

Satisfaction and dissatisfaction with delivery companies – **Urban vs Rural (Wave 2 , July-August only)**

| Amazon | Royal Mail | Parcelforce | DPD | DHL | FedEx | UPS | Yodel | Evri | DX Delivery | TNT Express |

NET: Satisfied

Amazon	Royal Mail	Parcelforce	DPD	DHL	FedEx	UPS	Yodel	Evri	DX Delivery	TNT Express
89% 90%	86% 90%	82% 85%	79% 83%	78% 81%	74% (Insufficient rural base size)	74% (Insufficient rural base size)	71% 69%	70% 74%	70% (Insufficient rural base size)	69% (Insufficient rural base size)

NET: Dissatisfied

Amazon	Royal Mail	Parcelforce	DPD	DHL	FedEx	UPS	Yodel	Evri	DX Delivery	TNT Express
4% 4%	7% 4%	6% 4%	5% 7%	3% 1%	4%	6%	12% 10%	16% 13%	8%	6%

Urban = Left-hand side, darker shading
Rural = Right-hand side, Lighter shading

↑ ↓ Significantly higher/lower than Urban at 95% confidence

Section 3
Satisfaction with the contact process

On average, 41% of those who contacted each delivery company were satisfied with the experience of "contacting the company to discuss an issue"

Satisfaction and dissatisfaction with contact process - **Contacting the delivery company to discuss an issue (Waves 1 & 2 combined)**
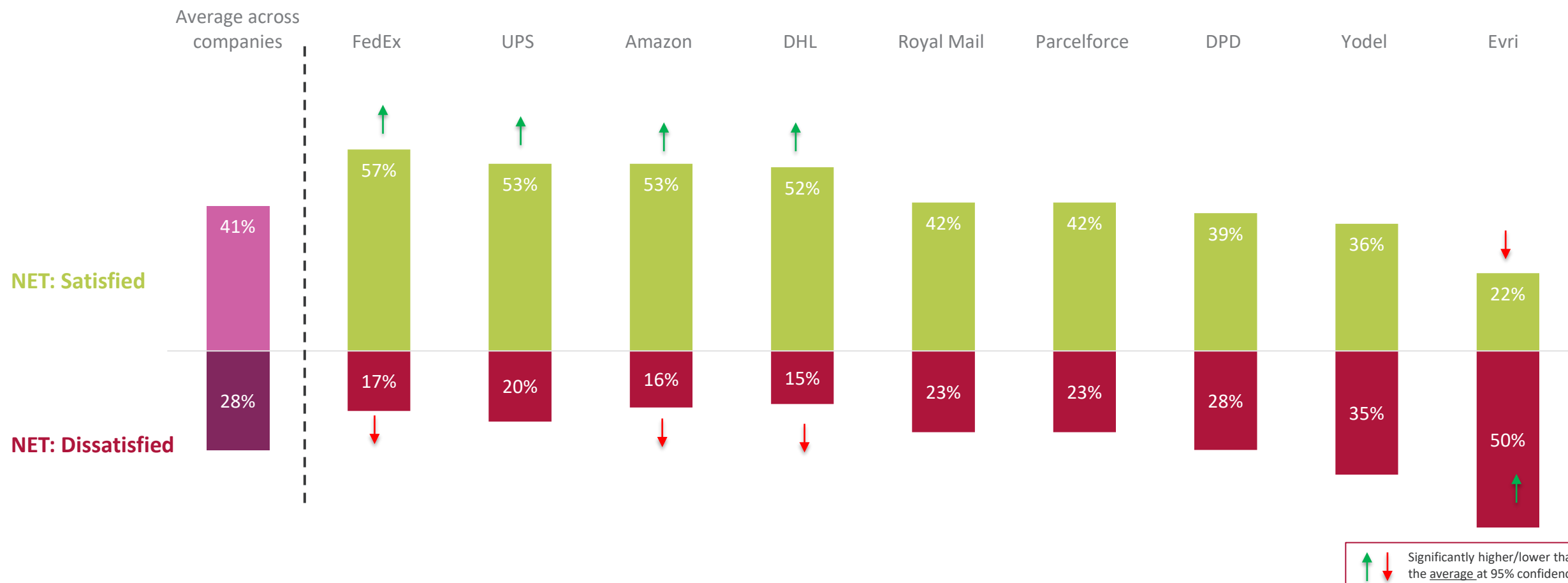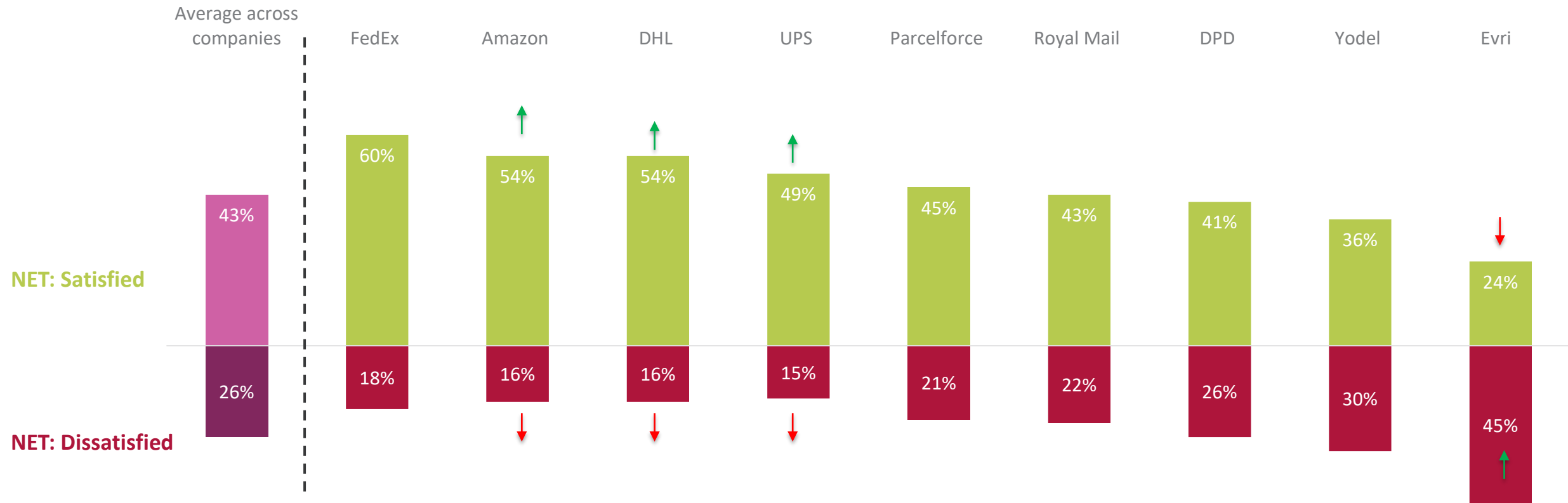
	Average across companies	FedEx	UPS	Amazon	DHL	Royal Mail	Parcelforce	DPD	Yodel	Evri
NET: Satisfied	41%	57%	53%	53%	52%	42%	42%	39%	36%	22%
NET: Dissatisfied	28%	17%	20%	16%	15%	23%	23%	28%	35%	50%

Significantly higher/lower than the <u>average</u> at 95% confidence

On average, 43% were satisfied with how their complaint was handled by staff

Satisfaction and dissatisfaction with contact process - **How your complaint was handled by staff at the delivery company (Waves 1 & 2 combined)**

	Average across companies	FedEx	Amazon	DHL	UPS	Parcelforce	Royal Mail	DPD	Yodel	Evri
NET: Satisfied	43%	60%	54% ↑	54% ↑	49% ↑	45%	43%	41%	36%	24% ↓
NET: Dissatisfied	26%	18%	16% ↓	16% ↓	15% ↓	21%	22%	26%	30%	45% ↑

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

On average, 47% of those contacting each delivery company were satisfied that their issue was resolved

Satisfaction and dissatisfaction with contact process - **That your issue was resolved (Waves 1 & 2 combined)**
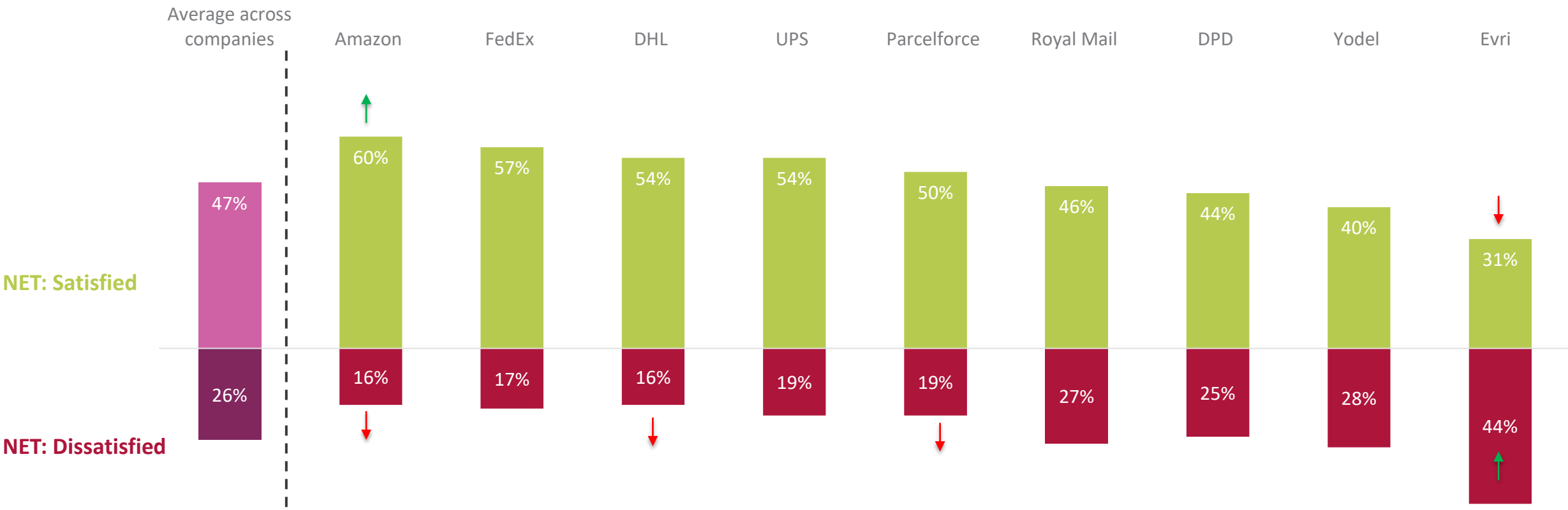
	Average across companies	Amazon	FedEx	DHL	UPS	Parcelforce	Royal Mail	DPD	Yodel	Evri
NET: Satisfied	47%	60%	57%	54%	54%	50%	46%	44%	40%	31%
NET: Dissatisfied	26%	16%	17%	16%	19%	19%	27%	25%	28%	44%

Significantly higher/lower than the underlined average at 95% confidence

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Across the three elements of the contact process, on average, just over four in ten of those who made contact were satisfied

Satisfaction and dissatisfaction with contact process – **Average across elements of the contact process (Waves 1 & 2 combined)**
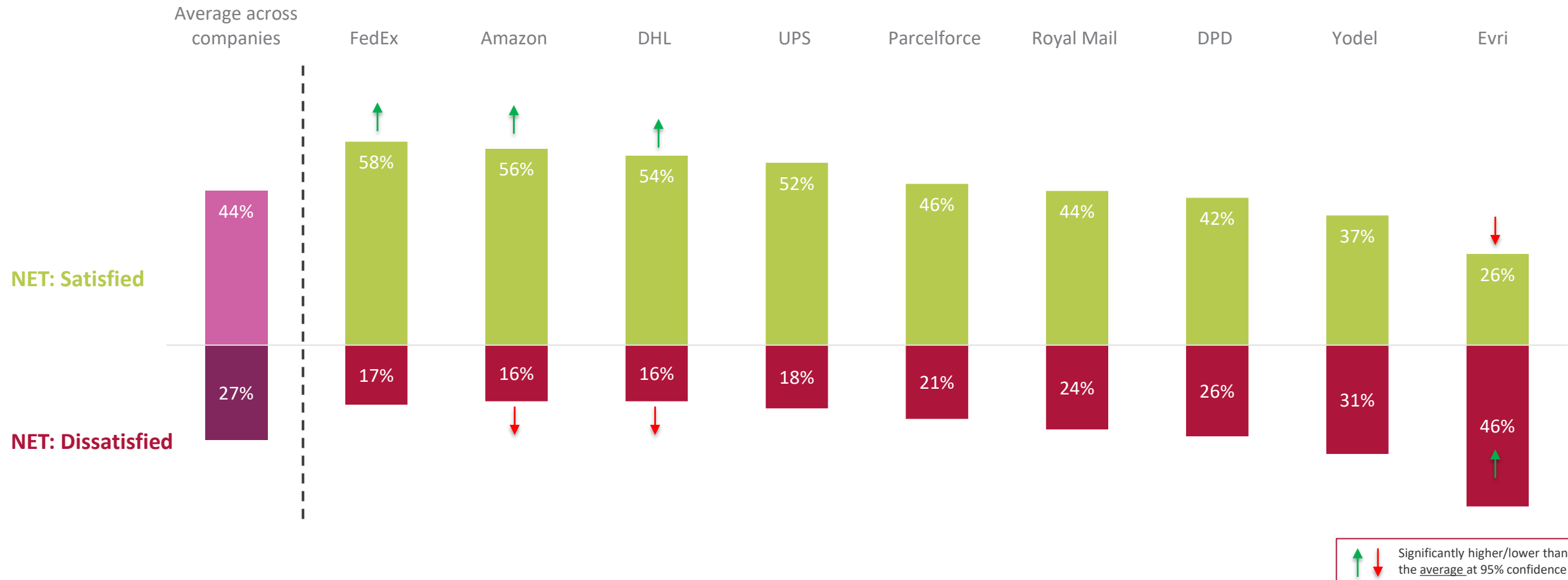
	Average across companies	FedEx	Amazon	DHL	UPS	Parcelforce	Royal Mail	DPD	Yodel	Evri
NET: Satisfied	44%	58%	56%	54%	52%	46%	44%	42%	37%	26%
NET: Dissatisfied	27%	17%	16%	16%	18%	21%	24%	26%	31%	46%

Significantly higher/lower than the average at 95% confidence

Among those dissatisfied with the process of contacting the delivery company, 55% said that this was because there was no way to contact the company by telephone

Dissatisfaction with contact – **NET: Any company (Waves 1 & 2 combined)**

55%	41%	21%	9%
No way of contacting the delivery company by phone	No way of contacting the delivery company via email or website	No way of contacting the delivery company in writing	Parcel company would not allow a friend / family member or carer to discuss my issue on my behalf

Section 4
Suggested service improvements

About eight in ten parcel recipients would like to see at least one service improvement but there were a range of views, with no single improvement emerging as consensus preference

Suggested improvements (Top 9) – **NET: Any company (Waves 1 & 2 combined)**
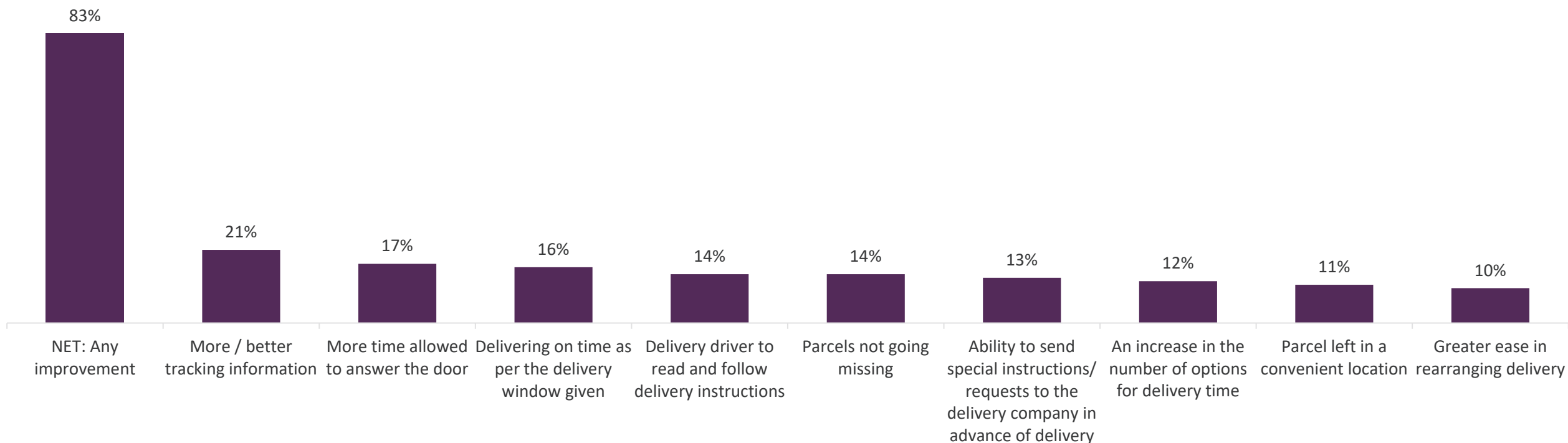
83%	21%	17%	16%	14%	14%	13%	12%	11%	10%
NET: Any improvement	More / better tracking information	More time allowed to answer the door	Delivering on time as per the delivery window given	Delivery driver to read and follow delivery instructions	Parcels not going missing	Ability to send special instructions/ requests to the delivery company in advance of delivery	An increase in the number of options for delivery time	Parcel left in a convenient location	Greater ease in rearranging delivery

Section 5
Users with an impacting/limiting condition

Users with impacting/limiting conditions are more likely to experience problems with delivery services

Experience of issues across all delivery companies – **those with impacting / limiting condition (Waves 1 & 2 combined)**

Significantly higher/lower than no impacting / limiting condition at 95% confidence

■ Any impacting / limiting condition　　■ No impacting / limiting condition

	NET: Any issues experienced	NET: Courier/transit issues	NET: Not delivered or delayed	NET: Accessibility	NET: Lack of information / options
Any impacting / limiting condition	73%	53%	46%	36%	27%
No impacting / limiting condition	65%	44%	39%	26%	22%

Those with eyesight conditions are more likely to experience all types of issue

Experience of issues across all delivery companies – **those with impacting / limiting condition, split by categories (Waves 1 & 2 combined)**

Significantly higher/lower than no impacting / limiting condition at 95% confidence

Legend: ■ NET: Any impacting / limiting condition ■ Hearing ■ Eyesight ■ Mobility ■ No impacting / limiting condition

NET: Any issues experienced
- 73%
- 69%
- 77%
- 68%
- 65%

NET: Courier/transit issues
- 53%
- 54%
- 58%
- 49%
- 44%

NET: Not delivered or delayed
- 46%
- 37%
- 52%
- 45%
- 39%

NET: Accessibility
- 36%
- 35%
- 37%
- 36%
- 26%

NET: Lack of information / options
- 27%
- 23%
- 31%
- 24%
- 22%

Users with impacting/limiting conditions are more likely to contact delivery companies about courier/transit or accessibility issues

Issues contacted about – **by any company (Waves 1 & 2 combined)**

Significantly higher/lower than <u>no impacting / limiting condition</u> at 95% confidence

Legend: ■ NET: Any impacting/limiting condition ■ Hearing ■ Eyesight ■ Mobility ■ No impacting / limiting condition

NET: Any issues contacted about
- 61%
- 69%
- 64%
- 62%
- 59%

NET: Not delivered or delayed
- 37%
- 34%
- 41%
- 39%
- 34%

NET: Courier/transit issues
- 37%
- 44%
- 39%
- 40%
- 32%

NET: Accessibility
- 19%
- 25%
- 19%
- 19%
- 15%

NET: Lack of information / options
- 15%
- 14%
- 16%
- 13%
- 13%

Those with limiting/impacting conditions have similar satisfaction/dissatisfaction with the complaints process as a whole, to those with no condition

Satisfaction and dissatisfaction with complaints service among those with an impacting/limiting condition – **Average across elements of the contact process (Waves 1 & 2 combined)**

No impacting / limiting condition	NET: Any impacting / limiting condition	Hearing	Eyesight	Mobility

NET: Satisfied

| 48% | 49% | 45% | 51% | 44% |

NET: Dissatisfied

| 24% | 25% | 22% | 21% | 26% |

No significant differences observed

Those with a limiting/impacting conditions have similar reasons for dissatisfaction with the contact process to those with no condition

Difficulty in contact – **those with a limiting/impacting condition by NET: Any company* (Waves 1 & 2 combined)**

Significantly higher/lower than no impacting / limiting condition at 95% confidence

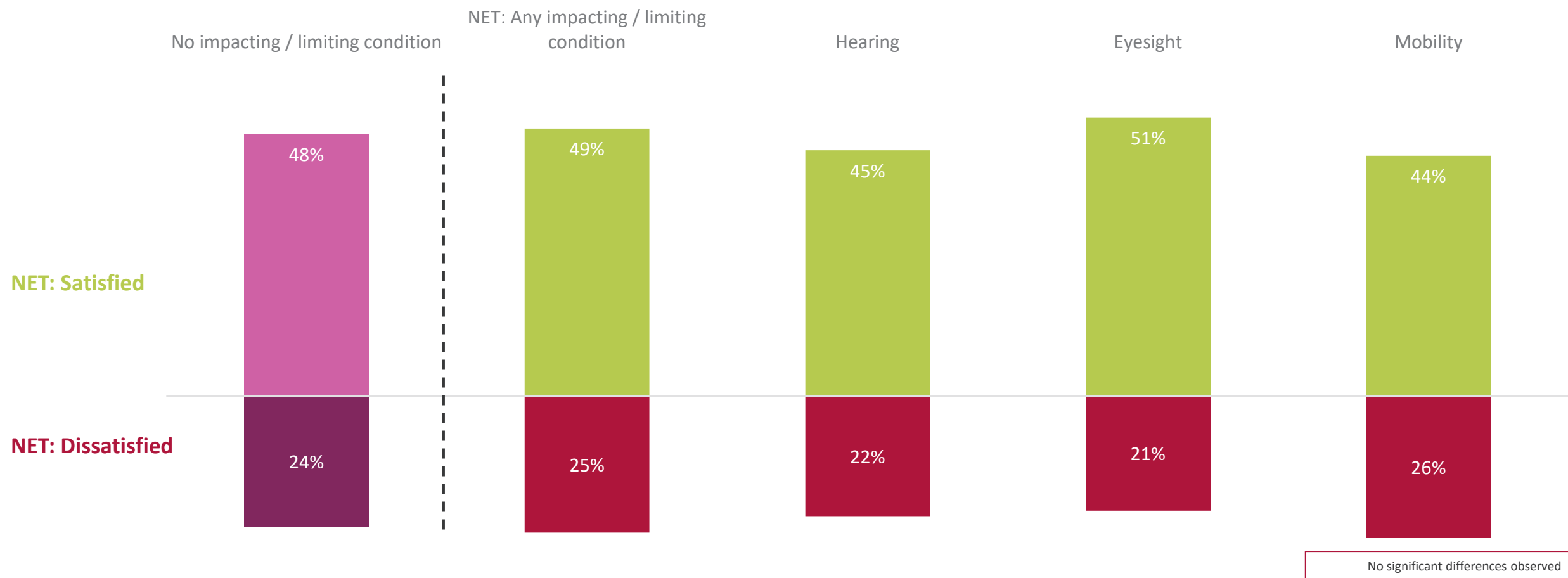Legend: ■ NET: Any limiting/impacting condition ■ Hearing ■ Eyesight ■ Mobility ■ No limiting/impacting condition

There was no way of contacting the delivery company by phone
- NET: Any limiting/impacting condition: 58%
- Hearing: 49%
- Eyesight: 46%
- Mobility: 54%
- No limiting/impacting condition: 54%

There was no way of contacting the delivery company via email or website
- NET: Any limiting/impacting condition: 44%
- Hearing: 56% ↑
- Eyesight: 40%
- Mobility: 46%
- No limiting/impacting condition: 39%

There was no way of contacting the delivery company via text relay / Relay UK
- NET: Any limiting/impacting condition: 24%
- Hearing: 27%
- Eyesight: 29%
- Mobility: 15%
- No limiting/impacting condition: 20%

There was no way of contacting the delivery company in writing
- NET: Any limiting/impacting condition: 23%
- Hearing: 20%
- Eyesight: 22%
- Mobility: 22%
- No limiting/impacting condition: 18%

Parcel company would not allow a friend / family member or carer to discuss my issue on my behalf
- NET: Any limiting/impacting condition: 9%
- Hearing: 9%
- Eyesight: 6%
- Mobility: 9%
- No limiting/impacting condition: 9%

Other difficulties or problems
- NET: Any limiting/impacting condition: 31%
- Hearing: 31%
- Eyesight: 31%
- Mobility: 35%
- No limiting/impacting condition: 28%

Those with limiting/impacting conditions would like to see improvements, such as having more time to answer the door and being able to send specific instructions in advance of delivery

QoS – **Any limiting / impacting condition (Waves 1 & 2 combined)**

The ability to send special instructions and requests is particularly key for those with **hearing** conditions (16%)

Convenient collection points (14%) and undamaged deliveries (12%) are significantly more likely to be cited as desired improvements for people with **eyesight** conditions

↑ ↓ Significantly higher/lower than no impacting / limiting condition at 95% confidence

Category	Any limiting/ impacting condition	No limiting/ impacting condition
More / better tracking information	20%	21%
More time allowed to answer the door	19% ↑	16%
Delivering on time as per the delivery window given	16%	16%
Parcels not going missing	15%	14%
Delivery driver to read and follow delivery instructions	15%	14%
Ability to send special instructions/ requests to the delivery company in advance of delivery	14% ↑	12%
An increase in the number of options for delivery time	11%	12%
Parcel left in a convenient location	11%	12%
Customer service's ability to resolve issues	11%	10%
Greater ease in rearranging delivery	11%	10%
A greater number of convenient parcel collection points	10%	9%
Parcel arriving without being damaged	10%	9%
Parcel delivered to your door	8%	10%
More time allowed to take the delivery from the courier	7%	7%
Greater courtesy from couriers	6%	5%
Courier delivering in person	5%	5%
Other	5%	5%

■ Any limiting/ impacting condition   ■ No limiting/ impacting condition

Appendix 1:
Experience of **sending** parcels for those with an impacting/limiting condition

The research also asked those with an impacting or limiting condition about their experience of *sending* parcels. Previous research has revealed that disabled consumers are more likely to experience problems with parcel deliveries. We wanted to understand their experience of sending parcels.

One in twenty parcel senders with an impacting or limiting condition said that it was difficult to send a parcel

Ease of sending parcel – **those with an impacting/limiting condition (Waves 1 & 2 combined)**
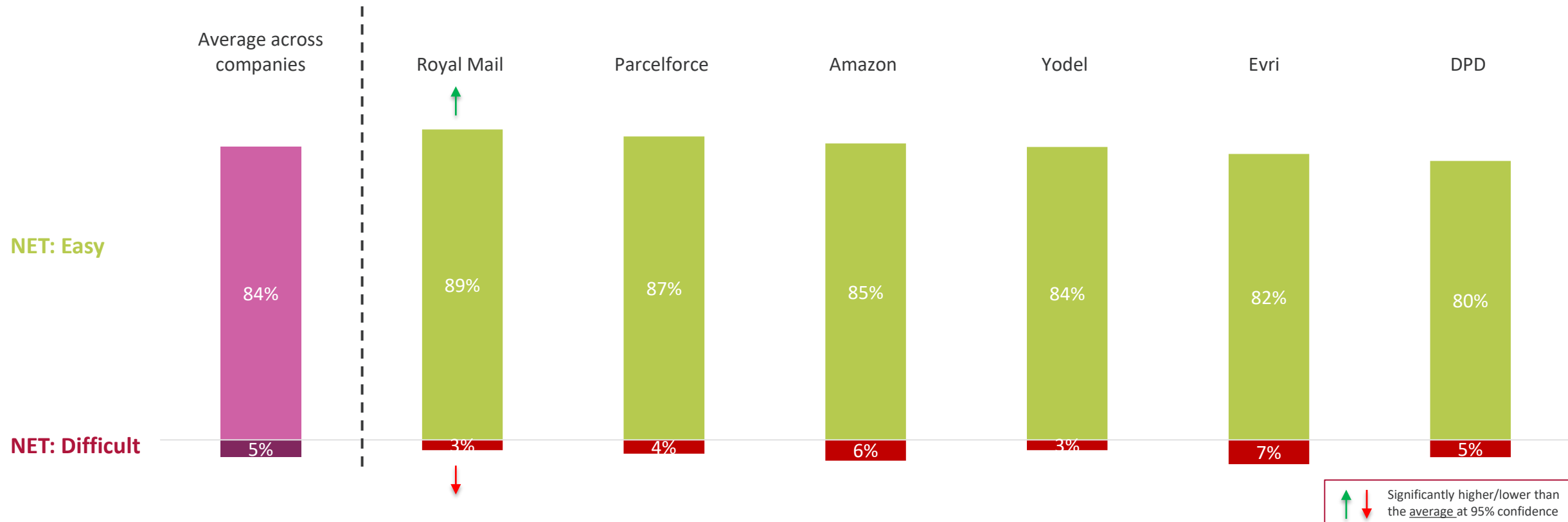
	Average across companies	Royal Mail	Parcelforce	Amazon	Yodel	Evri	DPD
NET: Easy	84%	89%	87%	85%	84%	82%	80%
NET: Difficult	5%	3%	4%	6%	3%	7%	5%

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

Parcel senders with an impacting or limiting condition say that the most common reason for experiencing difficulty when sending a parcel is insufficient drop off location options

Difficulty in sending – **those with a limiting/impacting condition by NET: Any company* (Waves 1 & 2 combined)**

No sig testing applied
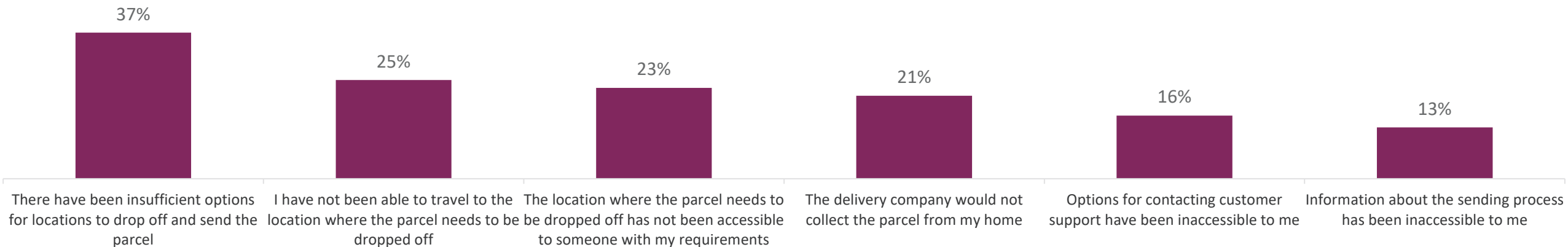
37%	25%	23%	21%	16%	13%
There have been insufficient options for locations to drop off and send the parcel	I have not been able to travel to the location where the parcel needs to be dropped off	The location where the parcel needs to be dropped off has not been accessible to someone with my requirements	The delivery company would not collect the parcel from my home	Options for contacting customer support have been inaccessible to me	Information about the sending process has been inaccessible to me

Appendix 2: Methodological notes

Urban vs. rural analysis

Impacting/limiting conditions

We recognise that urban and rural locations may offer different challenges when it comes to parcel delivery services. Additional analysis has been done to explore whether those living in urban locations have a different experience of parcel delivery services compared to those who live in rural areas within the July 2023 (W2) dataset.

In July 2023 respondents were offered the opportunity to share their post code anonymously. These post codes were associated with survey responses and mapped to urban or rural locations. We note that respondents could decline to provide their post code. Most (94%, 1,949 people) opted to provide their post code.

The analysis in this report highlights the results of the urban vs. rural locations using this post code methodology.

This report refers to people with impacting/limiting conditions. This wording reflects the question used to identify people who have a disability:

S5: 'Which of these, if any, impact or limit your daily activities or the work you can do?'

For the purposes of analysis, comparison has been made between those who do have impacting/limiting conditions and those who do not.

Additionally, three specific conditions have been focused on, those relating to:

- Eyesight
- Hearing
- Mobility