Residential Postal Tracker - Annual Report

Fieldwork: July 2022 - June 2023

This is a summary of findings from our residential postal tracker survey, focusing on the July 2022 – June 2023 results.

More details, including results data tabulations and technical reports can be found here:
https://www.ofcom.org.uk/research-and-data/data/statistics/stats23

Introduction

Objective

The overall aim of the Residential Postal Tracker research is to accurately measure and assess usage and attitudes towards postal services among UK adults (aged 16+) and to understand their postal needs, access to services and reactions to potential changes in the postal services.

Methodology

The Residential Postal Tracker is a continuous interviewing mixed-method (online and face-to-face) survey of postal users.

A strict quota sampling approach is taken to ensure representativity across nations, rurality, ages, gender and social grade.
Data is then weighted back to be nationally representative.

Due to the Covid-19 pandemic, face to face interviewing was paused until December 2022. From January 2023 face-to-face was included and is reported on. Differences due to methodology have been flagged.

Changes to the questionnaire were made in Q3 2022

Fieldwork and Reporting Period

This document reports on yearly trends for data captured between July and June.

Specifically the report calls out significant changes between the year "July 2022 - June 2023" and the previous reporting period "July 2021 - June 2022".

When data is split by quarters, these relate to calendar year (Q1: Jan-Mar, Q2: Apr-Jun, Q3: Jul-Sep, Q4: Oct-Dec). text

Importance and usage of postal services

The stated importance of post as a method of communication with friends and family declined this year, as the importance of Instant messaging continues to increase

Importance of channels to communicate with friends and family (NET Essential / Fairly important)

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

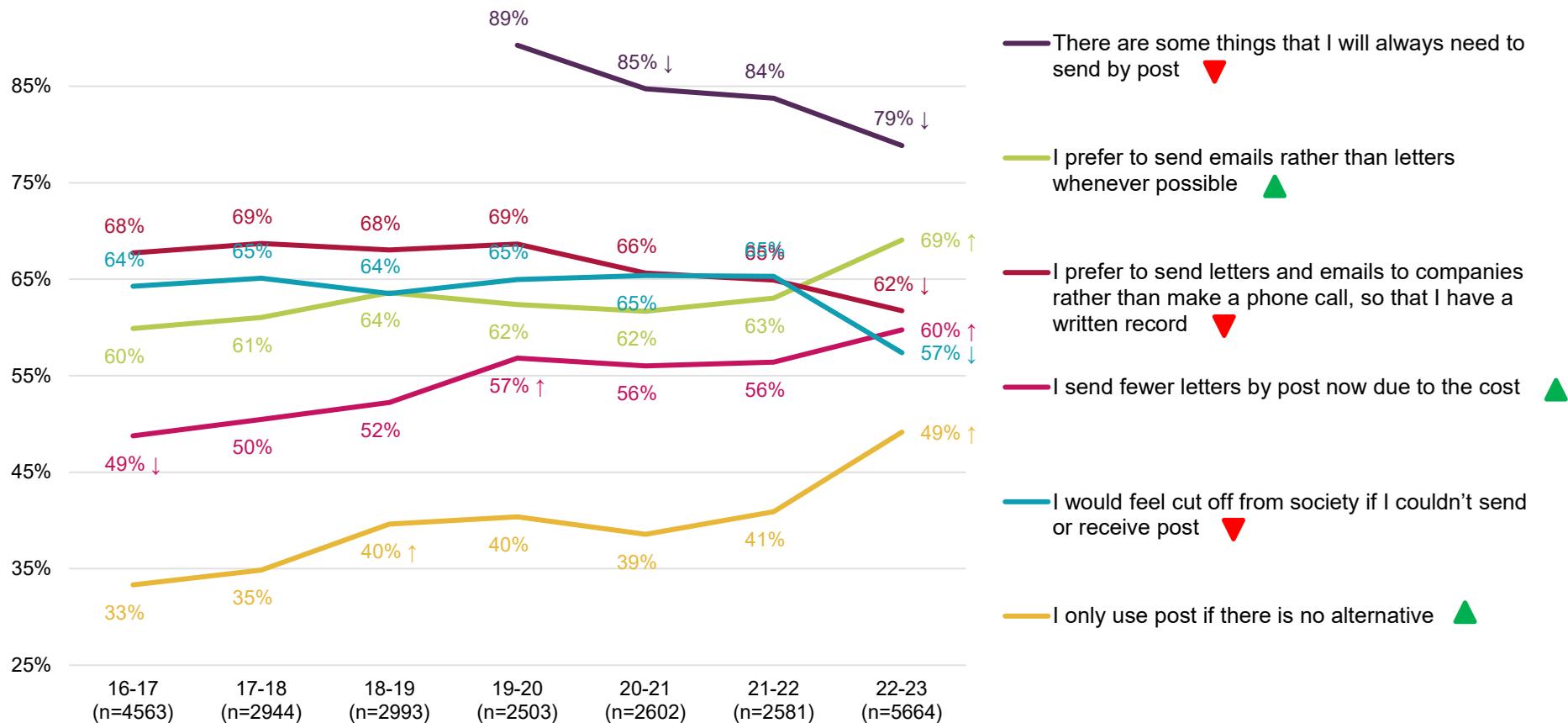# Significantly more agree that they would prefer to send emails rather than letters when possible, half would only send via post if there's no alternative

Attitudes to sending and receiving post (NET Strongly/Slightly agree)

Legend:
- There are some things that I will always need to send by post ▼
- I prefer to send emails rather than letters whenever possible ▲
- I prefer to send letters and emails to companies rather than make a phone call, so that I have a written record ▼
- I send fewer letters by post now due to the cost ▲
- I would feel cut off from society if I couldn't send or receive post ▼
- I only use post if there is no alternative ▲

Data points by time period:

Time period	There are some things...	Prefer emails	Prefer letters/emails to companies	Send fewer letters (cost)	Cut off from society	Only use post if no alternative
16-17 (n=4563)		60%	68%	49% ↓	64%	33%
17-18 (n=2944)		61%	69%	50%	65%	35%
18-19 (n=2993)		64%	68%	52%	64%	40% ↑
19-20 (n=2503)	89%	62%	69%	57% ↑	65%	40%
20-21 (n=2602)	85% ↓	65%	66%	56%	65%	39%
21-22 (n=2581)	84%	63%	65% 65%	56%		41%
22-23 (n=5664)	79% ↓	69% ↑	62% ↓	60% ↑	57% ↓	49% ↑

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

The majority agree that there will always be some things that need to be sent by post

Attitudes to sending and receiving post (Last year of data)

Legend: ■ Don't know ■ Strongly disagree (1) ■ Slightly disagree (2) ■ Neither agree nor disagree (3) ■ Slightly agree (4) ■ Strongly agree (5) | NET Agree

Statement	Don't know	Strongly disagree (1)	Slightly disagree (2)	Neither agree nor disagree (3)	Slightly agree (4)	Strongly agree (5)	NET Agree
There are some things that I will always need to send by post	1%	3%	5%	13%	38%	41%	**79%**
I prefer to send emails rather than letters whenever possible	1%	5%	8%	18%	35%	34%	**69%**
I prefer to send letters and emails to companies rather than make a phone call, so that I have a written record	1%	7%	10%	20%	34%	28%	**62%**
I send fewer letters by post now due to the cost	1%	7%	11%	22%	35%	25%	**60%**
I would feel cut off from society if I couldn't send or receive post	1%	9%	12%	20%	32%	25%	**57%**
I only use post if there is no alternative	1%	12%	18%	20%	30%	19%	**49%**
I only use post to send greetings cards	1%	17%	21%	19%	30%	13%	**43%**

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Across all postage types, postal users believe they are sending less than they did 2 years ago

Postage <u>sending</u> behaviour vs 2 years ago

NET Change*

Legend: ■ Don't know ■ Much less (1) ■ Slightly less (2) No change (3) Slightly more (4) Much more (5)

Postage type	Don't know	Much less (1)	Slightly less (2)	No change (3)	Slightly more (4)	Much more (5)	NET Change*
Tracked post, e.g. items that you can track where they are in the delivery process	2%	10%	11%	62%	11%	4%	-5%
Larger parcels - that will not fit through a letterbox	2%	12%	11%	61%	11%	4%	-8%
Smaller parcels - that will fit through a letterbox	2%	10%	11%	63%	11%	4%	-7%
Invitations, greetings cards and postcards	2%	13%	15%	59%	8%	3%	-17%
Items requiring a signature	3%	12%	11%	63%	8%	3%	-12%
Personal letters (e.g. to a friend or relative)	2%	16%	15%	58%	7%	3%	-21%
Payments for bills/ invoices/ statements	2%	16%	12%	61%	7%	3%	-18%
Formal letters to organisations or individuals	2%	14%	14%	60%	7%	3%	-18%

*NET Change= (Much more + Slightly more) – (Much less + Slightly less)

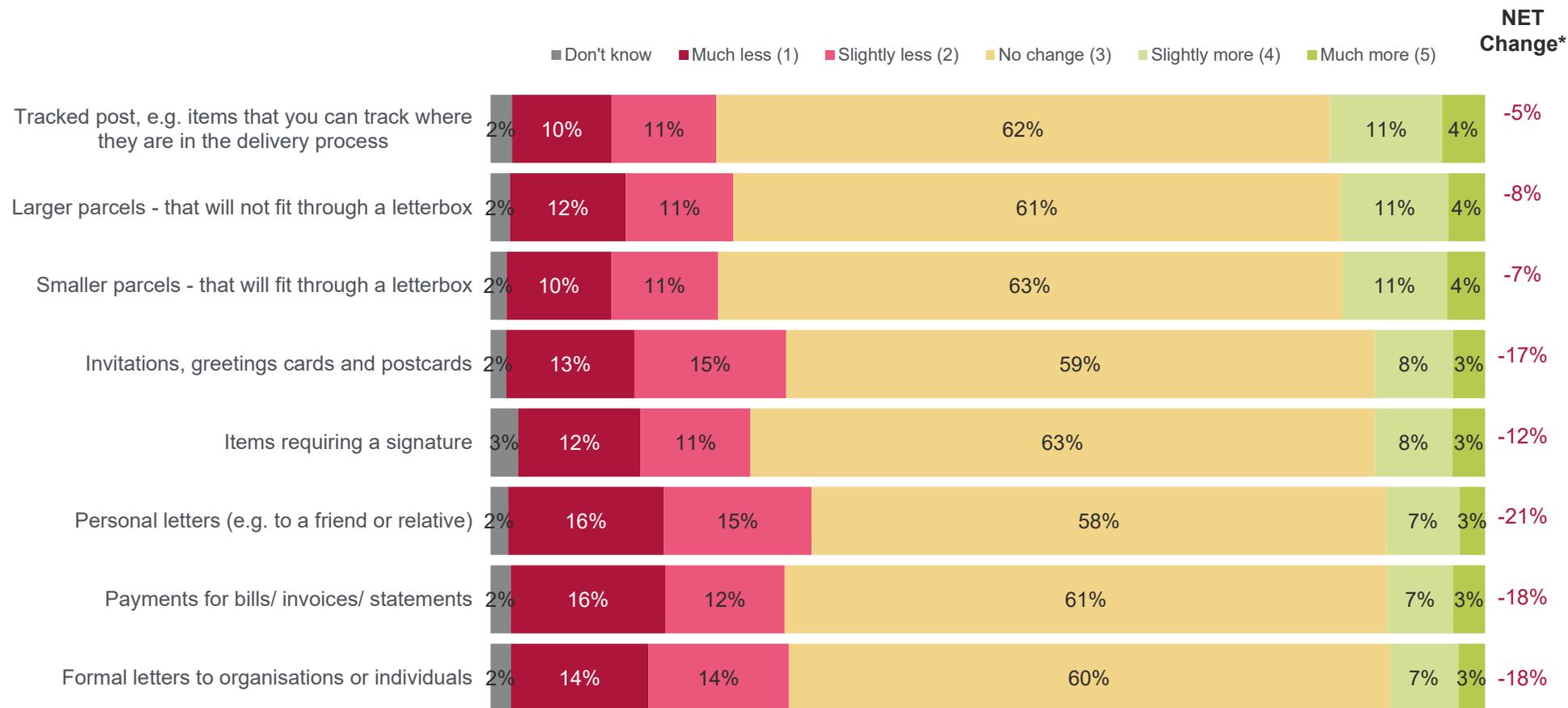Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

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Postal users perceive that in the last two years there has been a net decline in all types of letter post received

Postage receiving behaviour vs 2 years ago (Last 4 quarters)

Legend: ■ Don't know ■ Much less (1) ■ Slightly less (2) ■ No change (3) ■ Slightly more (4) ■ Much more (5)

Type	Don't know	Much less (1)	Slightly less (2)	No change (3)	Slightly more (4)	Much more (5)	NET Change*
Smaller parcels - that fit through a letterbox	1%	6%	11%	56%	20%	5%	8%
Larger parcels - that do not fit through a letterbox	2%	8%	11%	54%	19%	6%	6%
Addressed direct mail from organisations that you don't have a relationship with	3%	12%	16%	49%	16%	5%	-8%
Letters from organisations that you have a relationship with	2%	10%	17%	56%	12%	3%	-12%
Newsletters, leaflets and promotions from organisations that you have a relationship with	2%	11%	18%	54%	12%	3%	-14%
Items requiring a signature	2%	14%	15%	54%	12%	3%	-14%
Magazines you subscribe to	8%	15%	9%	59%	7%	2%	-15%
Catalogues and brochures	2%	16%	16%	49%	13%	3%	-16%
Bills, invoices and statements	1%	14%	18%	51%	11%	4%	-17%
Invitations, greetings cards and postcards	1%	14%	19%	54%	9%	3%	-21%
Personal letters (e.g. from a friend)	2%	19%	17%	51%	9%	2%	-25%

*NET Change= (Much more + Slightly more) – (Much less + Slightly less)

Source: Residential Postal Tracker
E2. Thinking about these different types of mail, would you say that you now receive them more or less often than two years ago? Or has there been no change?
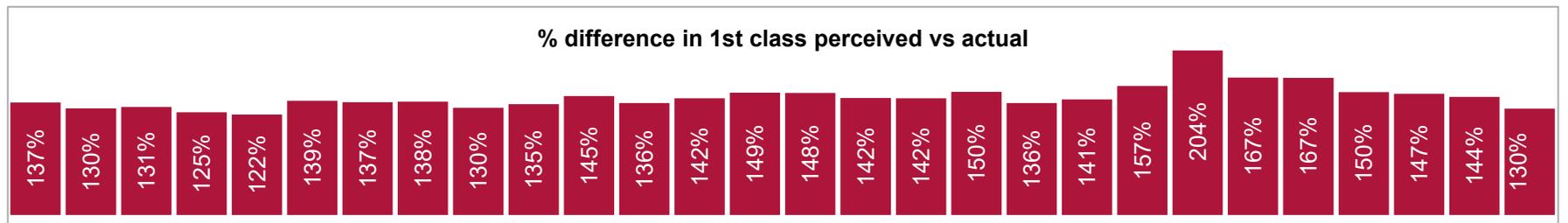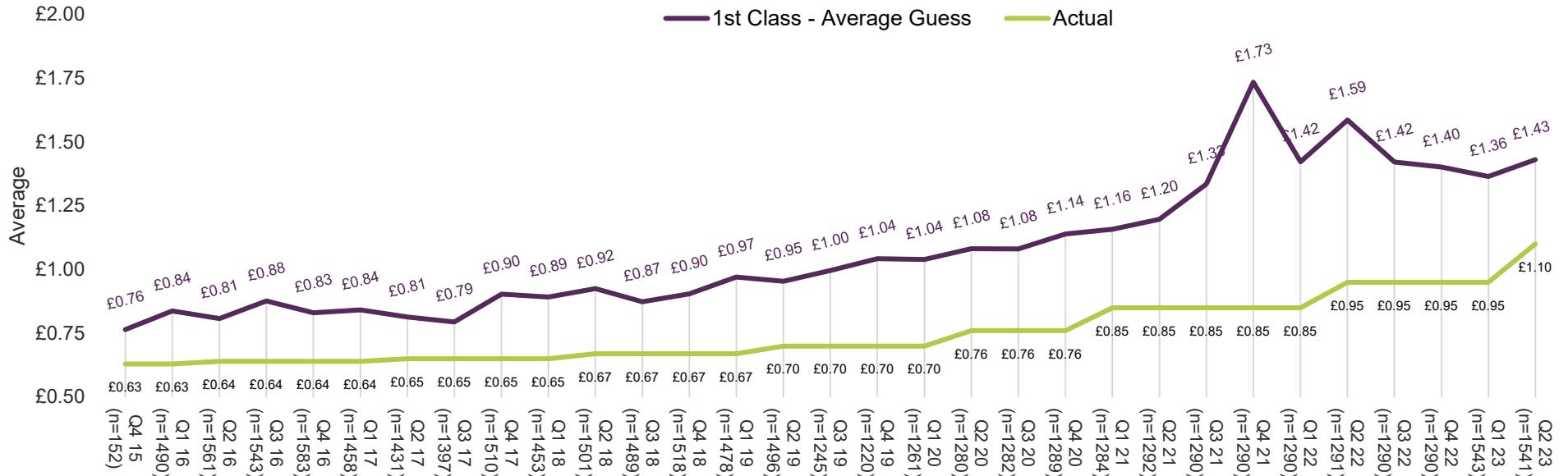
Base: All participants 2022-23 (n=5564)

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Letter price, value and affordability

Average estimated cost of a 1st Class stamp is now around £1.40

Estimated cost of a 1st class stamp

Legend: 1st Class - Average Guess, Actual

Average Guess values (£): 0.76, 0.84, 0.81, 0.88, 0.83, 0.84, 0.81, 0.79, 0.90, 0.89, 0.92, 0.87, 0.90, 0.97, 0.95, 1.00, 1.04, 1.04, 1.08, 1.08, 1.14, 1.16, 1.20, 1.33, 1.73, 1.42, 1.59, 1.42, 1.40, 1.36, 1.43

Actual values (£): 0.63, 0.63, 0.64, 0.64, 0.64, 0.64, 0.65, 0.65, 0.65, 0.65, 0.67, 0.67, 0.67, 0.67, 0.70, 0.70, 0.70, 0.70, 0.76, 0.76, 0.76, 0.85, 0.85, 0.85, 0.85, 0.85, 0.95, 0.95, 0.95, 0.95, 1.10

X-axis: Q4 15 (n=152), Q1 16 (n=1490), Q2 16 (n=1561), Q2 16 (n=1543), Q3 16 (n=1583), Q4 16 (n=1458), Q1 17 (n=1431), Q2 17 (n=1397), Q3 17 (n=1510), Q4 17 (n=1453), Q1 18 (n=1501), Q2 18 (n=1489), Q3 18 (n=1518), Q4 18 (n=1478), Q1 19 (n=1496), Q2 19 (n=1245), Q3 19 (n=1220), Q4 19 (n=1261), Q1 20 (n=1280), Q2 20 (n=1282), Q3 20 (n=1289), Q4 20 (n=1284), Q1 21 (n=1292), Q2 21 (n=1290), Q3 21 (n=1290), Q4 21 (n=1290), Q1 22 (n=1291), Q2 22 (n=1290), Q3 22 (n=1290), Q4 22 (n=1543), Q1 23 (n=1541), Q2 23 (n=1541)

% difference in 1st class perceived vs actual

137%, 130%, 131%, 125%, 122%, 139%, 137%, 138%, 130%, 135%, 145%, 136%, 142%, 149%, 148%, 142%, 142%, 150%, 136%, 141%, 157%, 204%, 167%, 167%, 150%, 147%, 144%, 130%

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Average estimated cost of a 2nd Class stamp is now around £1

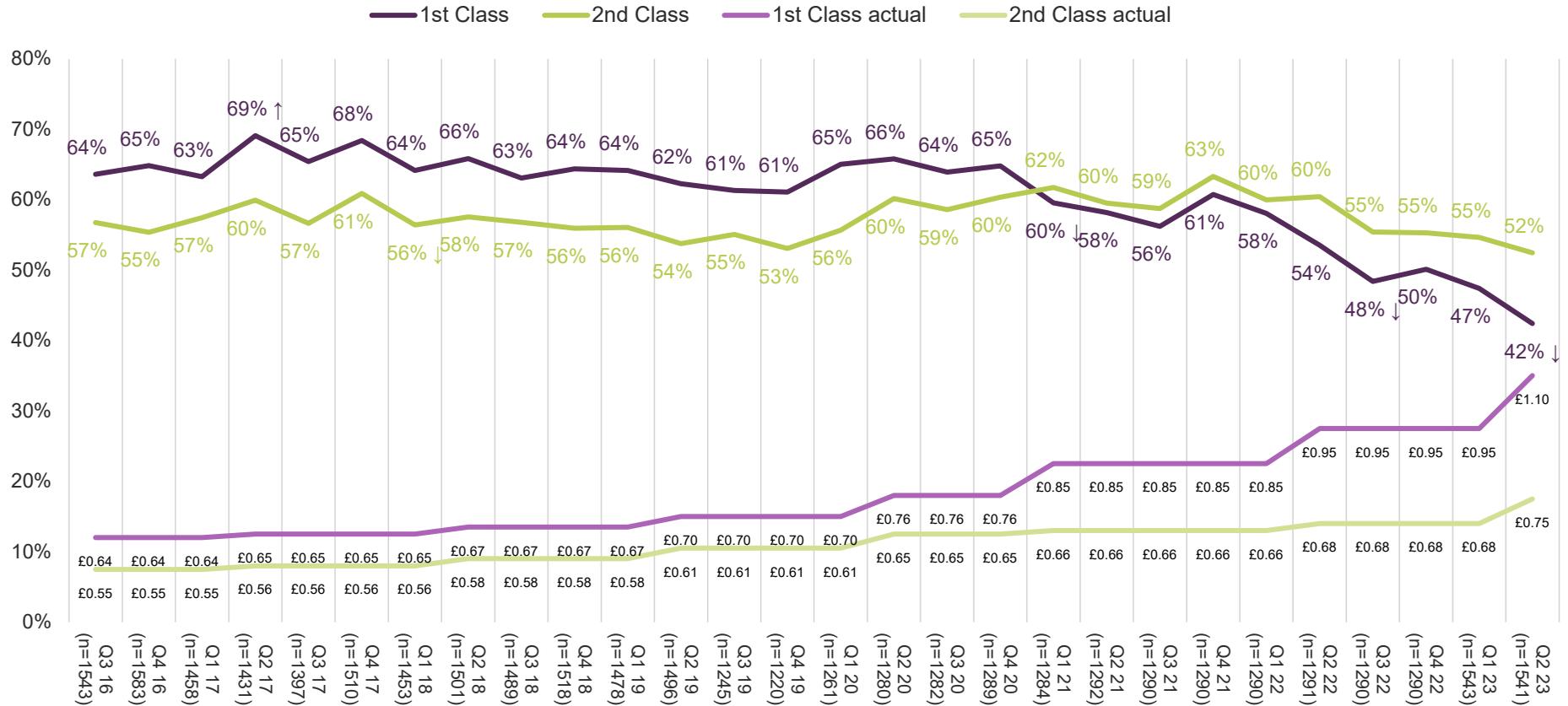**Estimated cost of a 2nd class stamp**
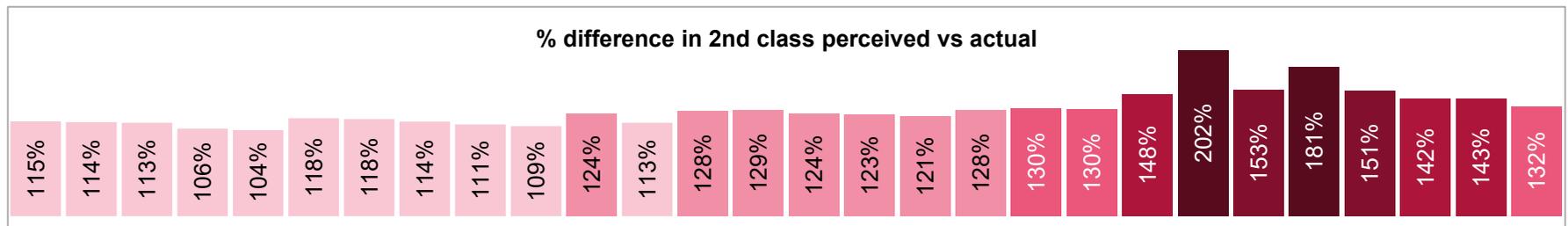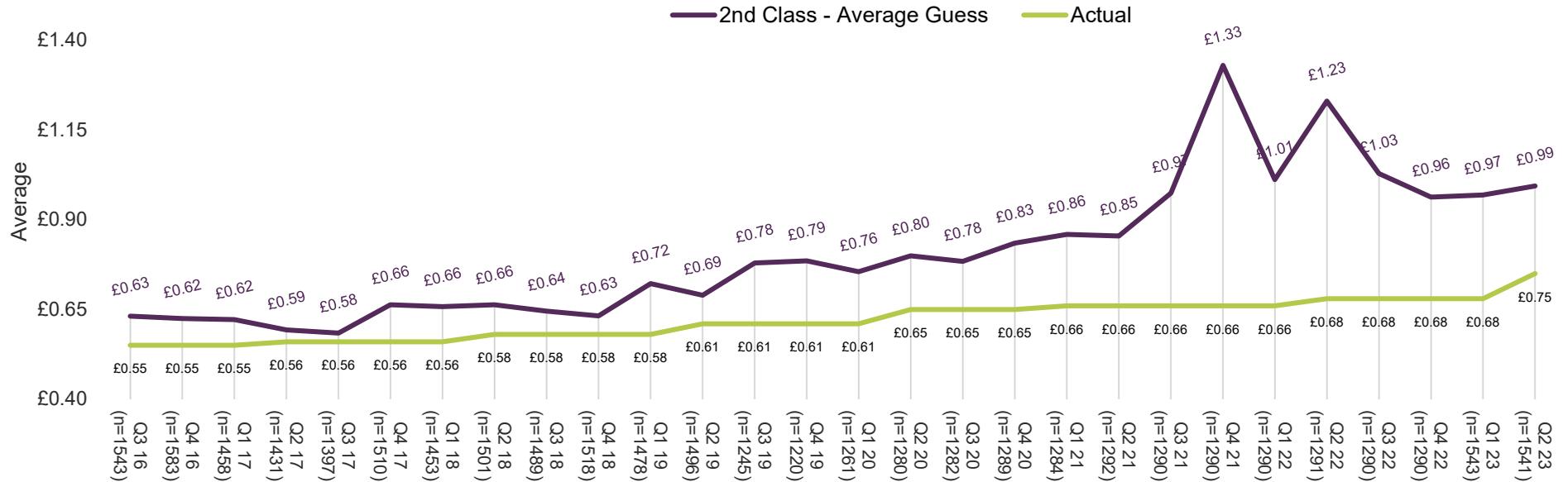
Source: Residential Postal Tracker
H4. (Old QF3) Giving your best guess, how much do you think a <u>second class stamp</u> for a standard letter costs today?

Base: All participants - Sample size shown on chart

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Perceptions of value for money continue to decline significantly, especially since 1st class stamps passed the £1 price point
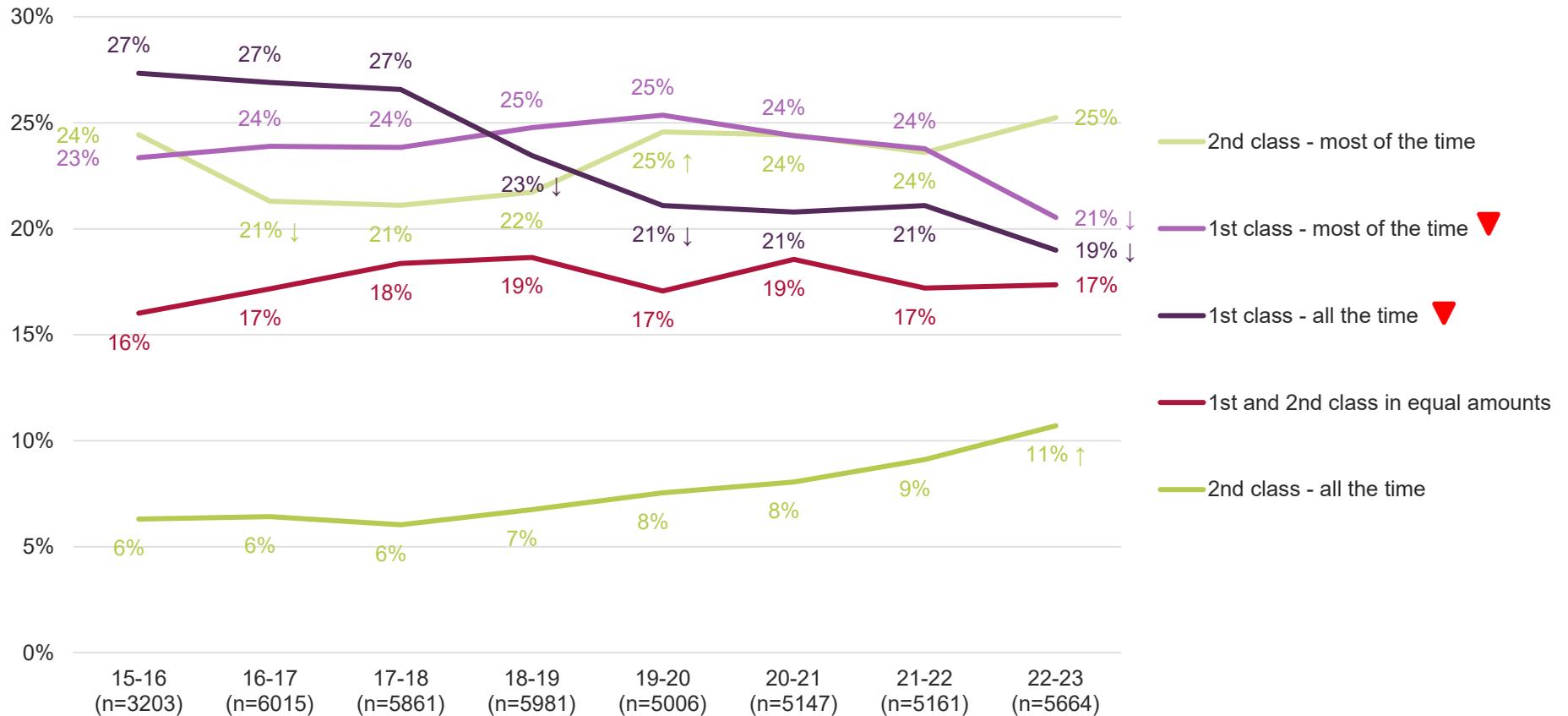
Value for Money (NET Good Value for Money)

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Based on stated tendencies, postal users are now switching away from 1st class usage to 2nd class

Services used when sending letters or cards

Legend:
- 2nd class - most of the time
- 1st class - most of the time ▼
- 1st class - all the time ▼
- 1st and 2nd class in equal amounts
- 2nd class - all the time

Data points by year:

Year (base)	2nd class - most of the time	1st class - most of the time	1st class - all the time	1st and 2nd class in equal amounts	2nd class - all the time
15-16 (n=3203)	24%	23%	27%	16%	6%
16-17 (n=6015)	21% ↓	24%	27%	17%	6%
17-18 (n=5861)	21%	24%	27%	18%	6%
18-19 (n=5981)	22%	25%	23% ↓	19%	7%
19-20 (n=5006)	25% ↑	25%	21% ↓	17%	8%
20-21 (n=5147)	24%	24%	21%	19%	8%
21-22 (n=5161)	24%	24%	21%	17%	9%
22-23 (n=5664)	25%	21% ↓	19% ↓	17%	11% ↑

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Cost has increasingly become the reason for choosing to use 2nd class stamps all/most of the time

Influences for using 2nd class stamps all/most of the time
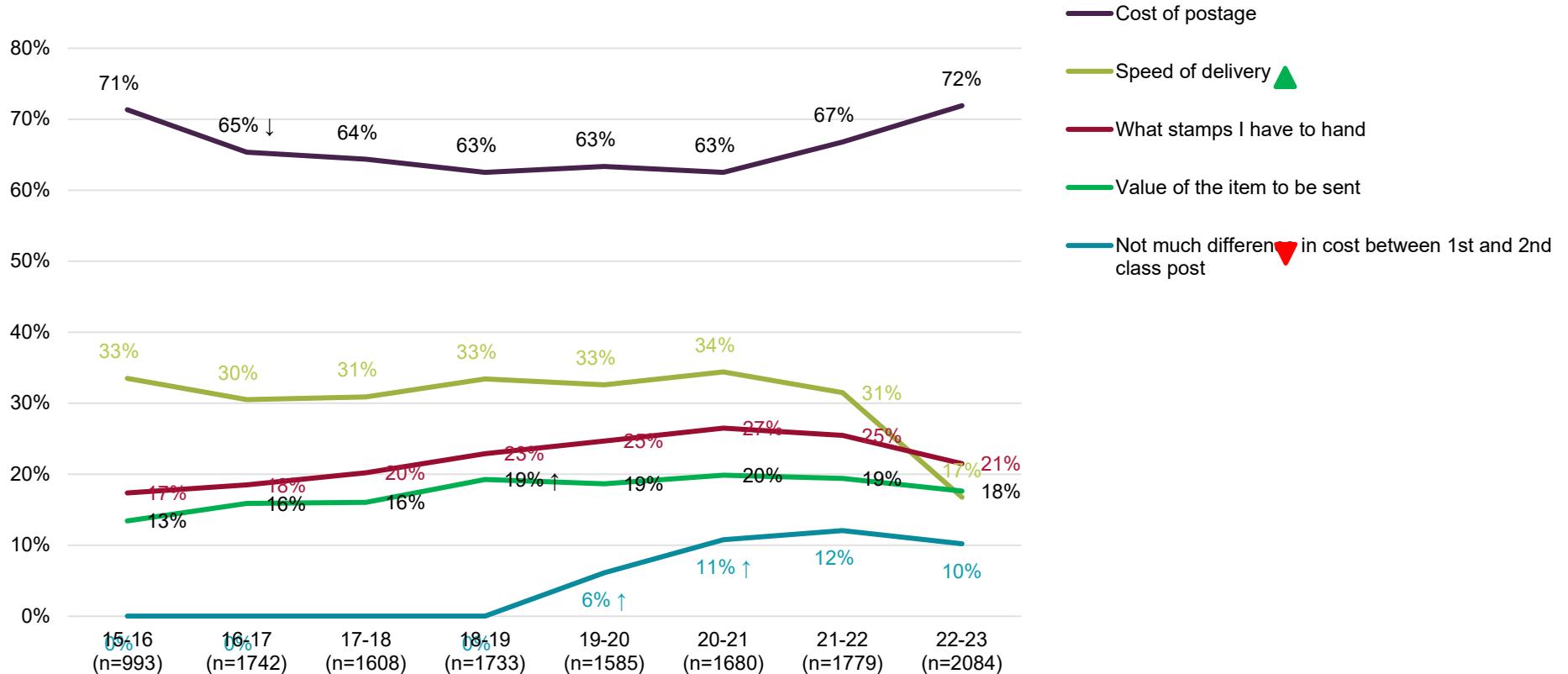
Legend:
- Cost of postage
- Speed of delivery ▲
- What stamps I have to hand
- Value of the item to be sent
- Not much difference in cost between 1st and 2nd class post ▼

Cost of postage: 71%, 65% ↓, 64%, 63%, 63%, 63%, 67%, 72%
Speed of delivery: 33%, 30%, 31%, 33%, 33%, 34%, 31%, 17%
What stamps I have to hand: 17%, 18%, 20%, 23%, 23%, 27%, 25%, 21%
Value of the item to be sent: 13%, 16%, 16%, 19% ↑, 19%, 20%, 19%, 18%
Not much difference in cost between 1st and 2nd class post: 0%, 0%, 0%, 6% ↑, 11% ↑, 12%, 10%

X-axis: 15-16 (n=993), 16-17 (n=1742), 17-18 (n=1608), 18-19 (n=1733), 19-20 (n=1585), 20-21 (n=1680), 21-22 (n=1779), 22-23 (n=2084)

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Those choosing to send via 1ˢᵗ class all/most of the time do so primarily for speed of delivery

Influences for using either 1st or 2nd class stamps

■ Total reasons for choice of stamps

Reason	Total
Cost of postage	43%
Speed of delivery	41%
What stamps I have to hand	23%
Value of the item to be sent	20%
Not much difference in cost between 1st and 2nd class post	14%
Security (i.e. that items sent will reach their destination intact)	12%
Postal service are less likely to lose the mail / will treat it better	12%
I don't want others to think that I don't want to use a 1st class stamp	5%
Other	1%
No particular reason	6%
I don't know	1%

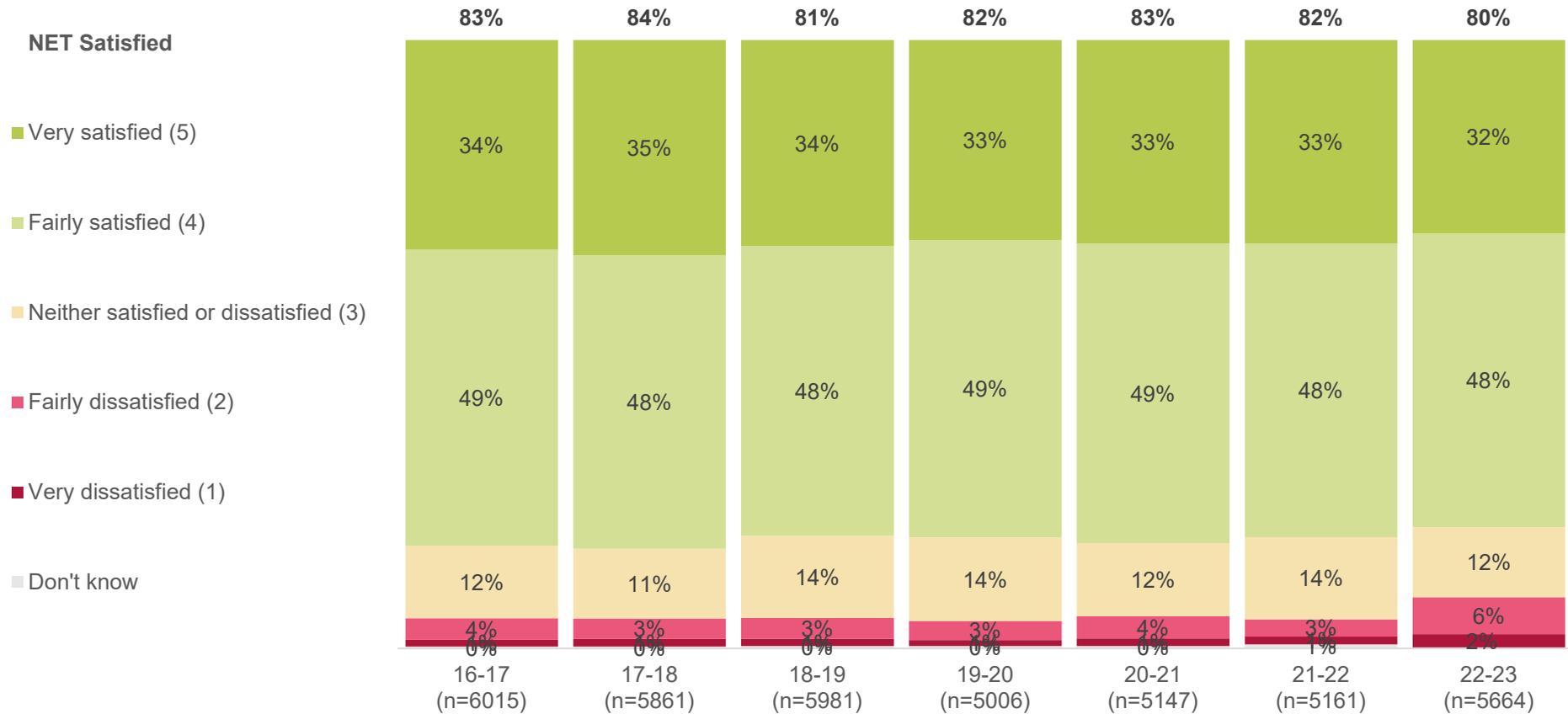| Reason	Use 1st Class All/most of the time (n=2202)	Use 2nd Class All/most of the time (n=2084)
Cost of postage	20%	72%
Speed of delivery	60%	17%
What stamps I have to hand	22%	21%
Value of the item to be sent	20%	18%
Not much difference in cost between 1st and 2nd class post	16%	10%
Security (i.e. that items sent will reach their destination intact)	17%	6%
Postal service are less likely to lose the mail / will treat it better	18%	5%
I don't want others to think that I don't want to use a 1st class stamp	8%	3%
Other	0%	2%
No particular reason	5%	6%
I don't know	1%	1%

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Royal Mail satisfaction and letter complaints

The majority of Royal Mail users are satisfied with the service, though dissatisfaction has started to grow

Overall satisfaction with the Royal Mail

NET Satisfied

	16-17 (n=6015)	17-18 (n=5861)	18-19 (n=5981)	19-20 (n=5006)	20-21 (n=5147)	21-22 (n=5161)	22-23 (n=5664)
NET Satisfied	83%	84%	81%	82%	83%	82%	80%
Very satisfied (5)	34%	35%	34%	33%	33%	33%	32%
Fairly satisfied (4)	49%	48%	48%	49%	49%	48%	48%
Neither satisfied or dissatisfied (3)	12%	11%	14%	14%	12%	14%	12%
Fairly dissatisfied (2)	4%	3%	3%	3%	4%	3%	6%
Very dissatisfied (1)	0%	0%	0%	0%	0%	1%	2%

- Very satisfied (5)
- Fairly satisfied (4)
- Neither satisfied or dissatisfied (3)
- Fairly dissatisfied (2)
- Very dissatisfied (1)
- Don't know

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

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While overall satisfaction with Royal Mail remains high, satisfaction with the cost of postage significantly drops by 14% points
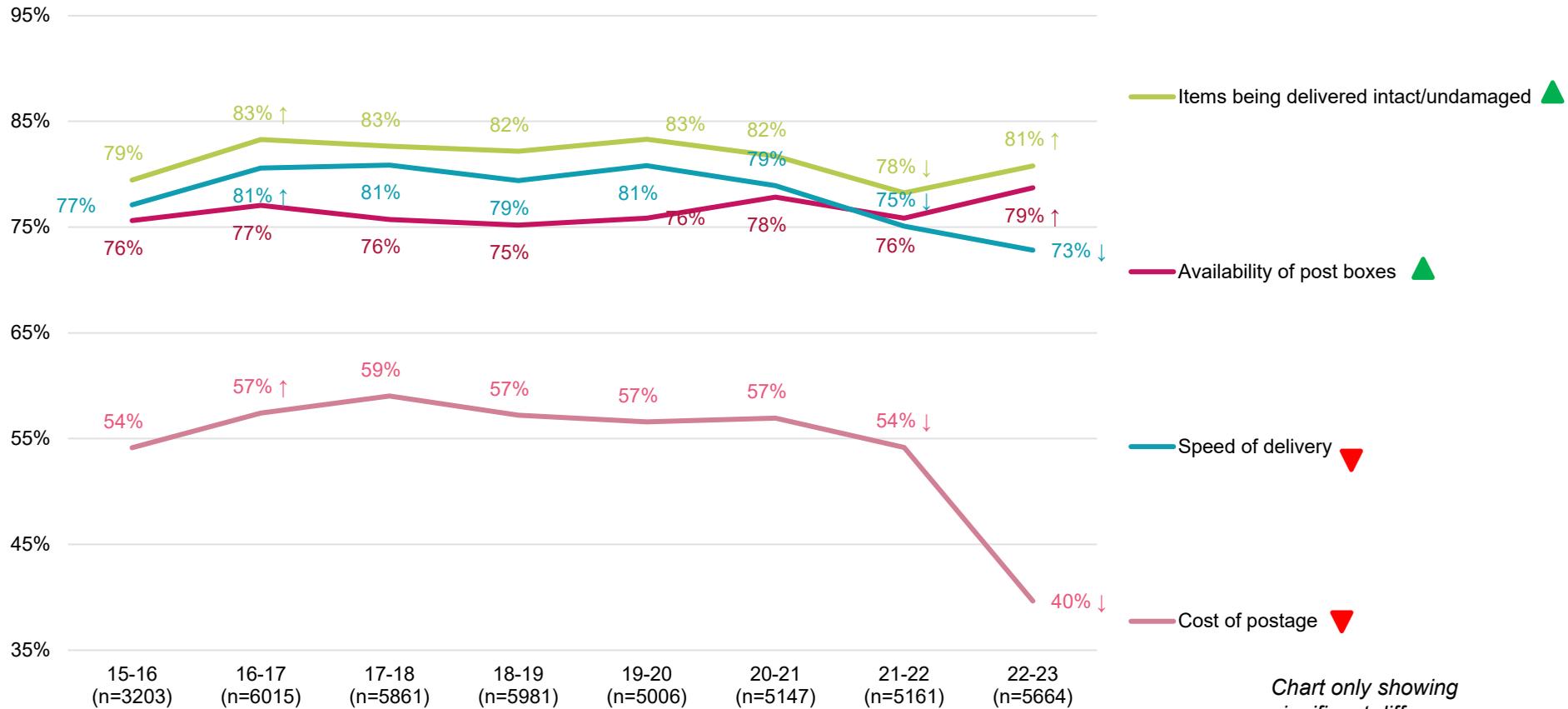
Satisfaction with Royal Mail's service elements

Items being delivered intact/undamaged ▲

Availability of post boxes ▲

Speed of delivery ▼

Cost of postage ▼

Chart only showing significant differences

x-axis categories:
- 15-16 (n=3203)
- 16-17 (n=6015)
- 17-18 (n=5861)
- 18-19 (n=5981)
- 19-20 (n=5006)
- 20-21 (n=5147)
- 21-22 (n=5161)
- 22-23 (n=5664)

Items being delivered intact/undamaged: 79%, 83% ↑, 83%, 82%, 83%, 82%, 78% ↓, 81% ↑

Speed of delivery: 77%, 81% ↑, 81%, 79%, 81%, 79%, 75% ↓, 73% ↓

Availability of post boxes: 76%, 77%, 76%, 75%, 76%, 78%, 76%, 79% ↑

Cost of postage: 54%, 57% ↑, 59%, 57%, 57%, 57%, 54% ↓, 40% ↓

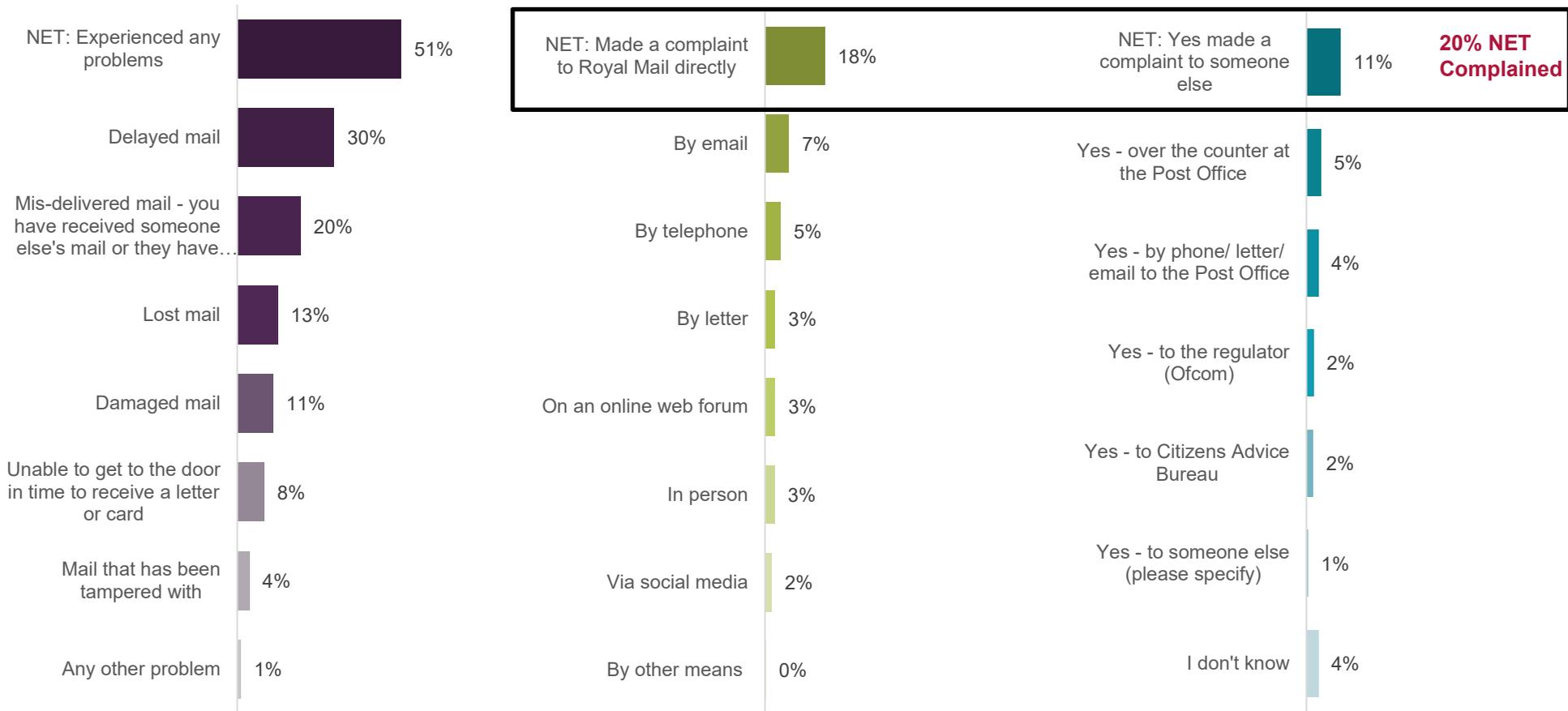Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Half of postal users have experienced a problem with sending or receiving letters however only 18% have made a complaint to Royal Mail

Incidence of Problems and Complaints with the Royal Mail – among <u>all</u> postal users

Experienced problems		Made a complaint to Royal Mail directly		Made a complaint to someone else	
NET: Experienced any problems	51%	NET: Made a complaint to Royal Mail directly	18%	NET: Yes made a complaint to someone else	11%
Delayed mail	30%	By email	7%	Yes - over the counter at the Post Office	5%
Mis-delivered mail - you have received someone else's mail or they have…	20%	By telephone	5%	Yes - by phone/ letter/ email to the Post Office	4%
Lost mail	13%	By letter	3%	Yes - to the regulator (Ofcom)	2%
Damaged mail	11%	On an online web forum	3%	Yes - to Citizens Advice Bureau	2%
Unable to get to the door in time to receive a letter or card	8%	In person	3%	Yes - to someone else (please specify)	1%
Mail that has been tampered with	4%	Via social media	2%	I don't know	4%
Any other problem	1%	By other means	0%		

20% NET Complained

Over half found the process of complaining and their resulting outcomes a satisfying experience but a significant proportion (20%) found it difficult

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Ease and Satisfaction

Ease of complaining to the Royal Mail

NET Easy

- Very easy (5)
- Fairly easy (4)
- Neither easy nor difficult (3)
- Fairly difficult (2)
- Very difficult (1)
- I don't know

58%

22-23 (n=863)
21%
37%
21%
10%
9%
2%

Satisfaction with…

NET Satisfied

- Very satisfied (5)
- Fairly satisfied (4)
- Neither satisfied or dissatisfied (3)
- Fairly dissatisfied (2)
- Very dissatisfied (1)
- Don't know

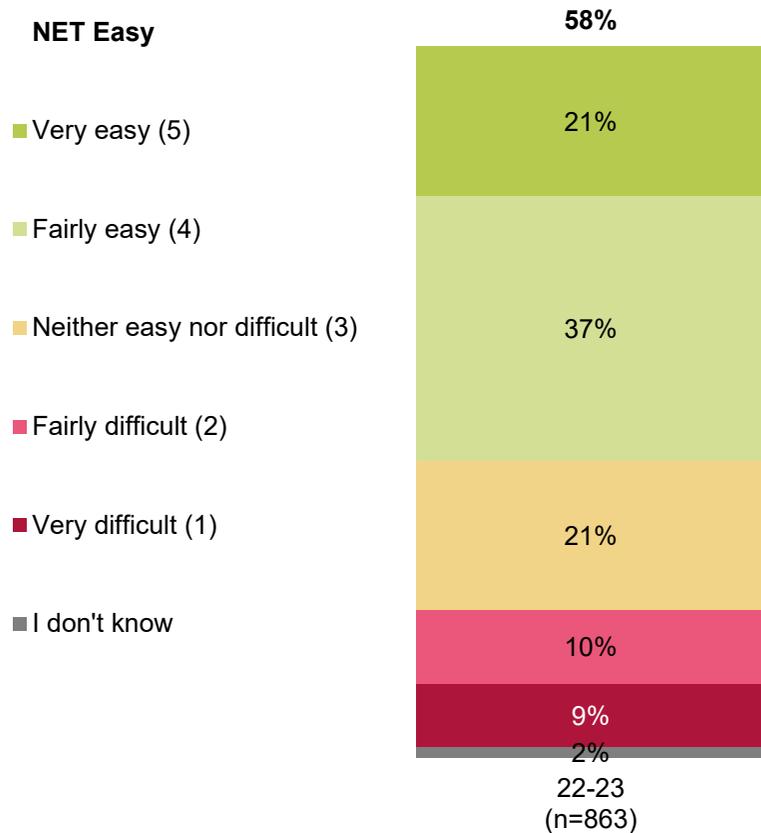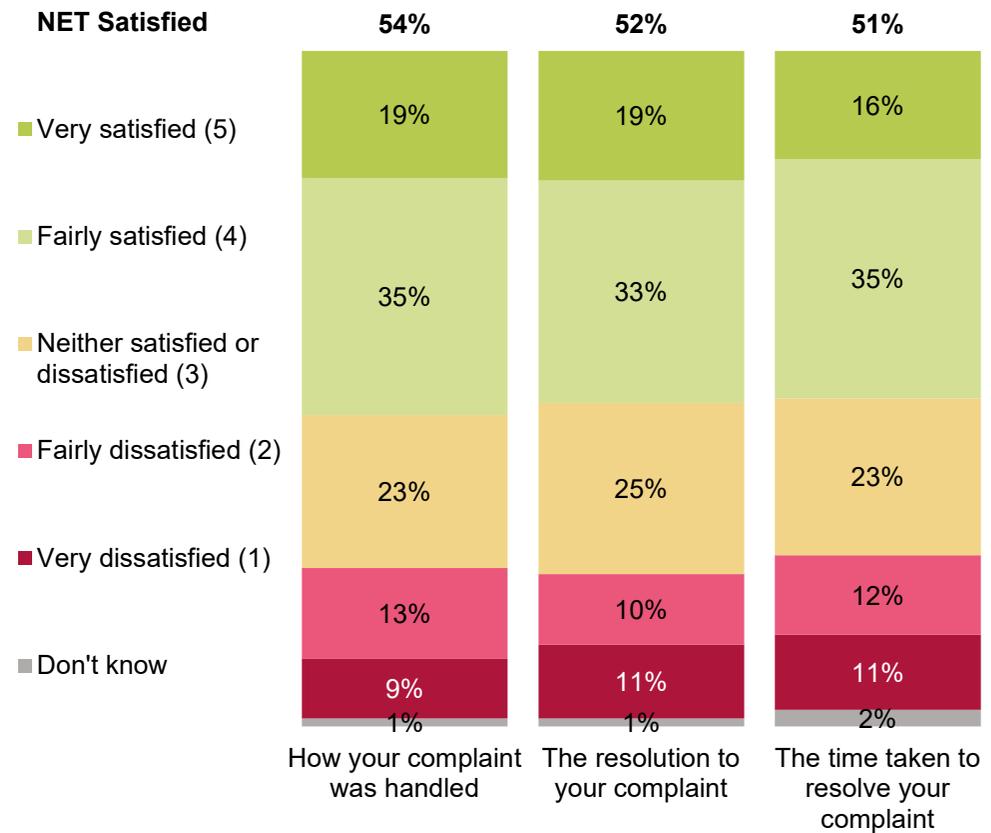|	How your complaint was handled	The resolution to your complaint	The time taken to resolve your complaint
NET Satisfied	**54%**	**52%**	**51%**
Very satisfied / Fairly satisfied (top)	19%	19%	16%
	35%	33%	35%
Neither	23%	25%	23%
Fairly dissatisfied	13%	10%	12%
Very dissatisfied	9%	11%	11%
Don't know	1%	1%	2%

Arrows denote significant positive or negative change vs previous time period.
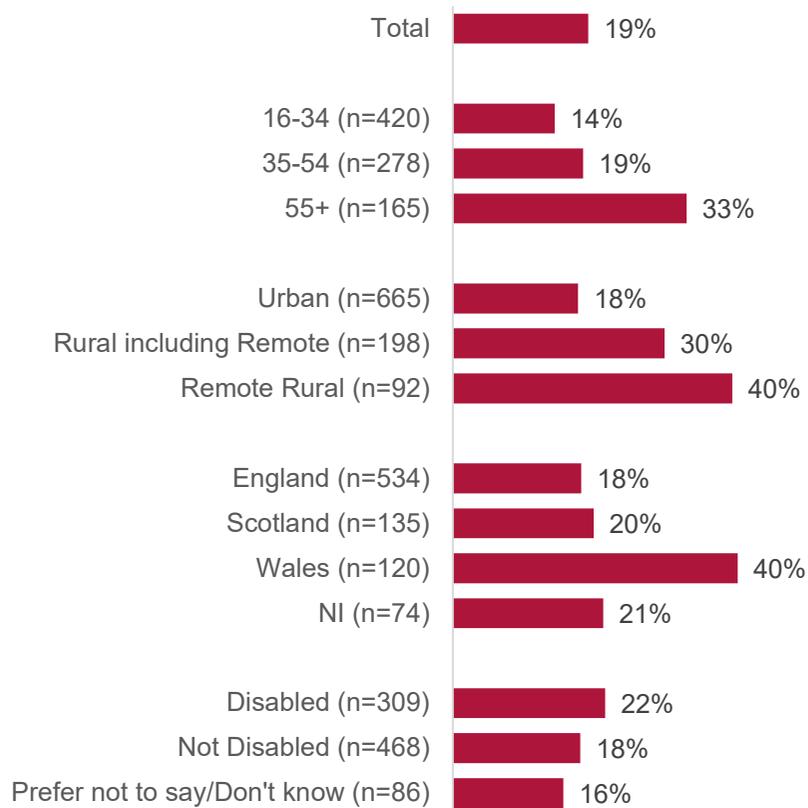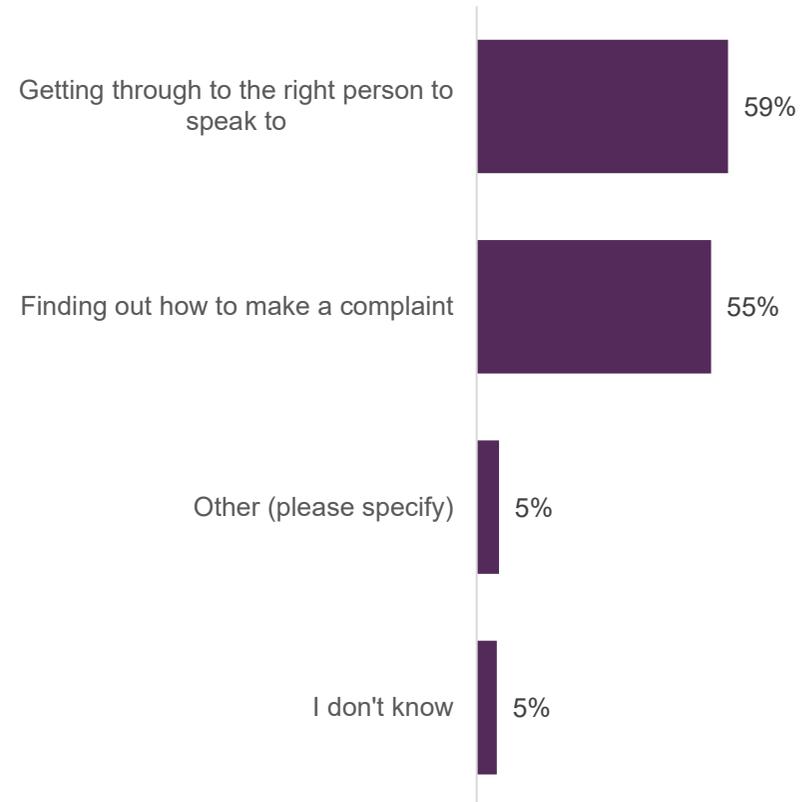Significance testing to 95%.

Those more likely to find it difficult to complain are generally older and based in more rural locations

Difficulties making complaints to the Royal Mail

% NET Difficult to complain

Category	%
Total	19%
16-34 (n=420)	14%
35-54 (n=278)	19%
55+ (n=165)	33%
Urban (n=665)	18%
Rural including Remote (n=198)	30%
Remote Rural (n=92)	40%
England (n=534)	18%
Scotland (n=135)	20%
Wales (n=120)	40%
NI (n=74)	21%
Disabled (n=309)	22%
Not Disabled (n=468)	18%
Prefer not to say/Don't know (n=86)	16%

What was difficult?

Category	%
Getting through to the right person to speak to	59%
Finding out how to make a complaint	55%
Other (please specify)	5%
I don't know	5%

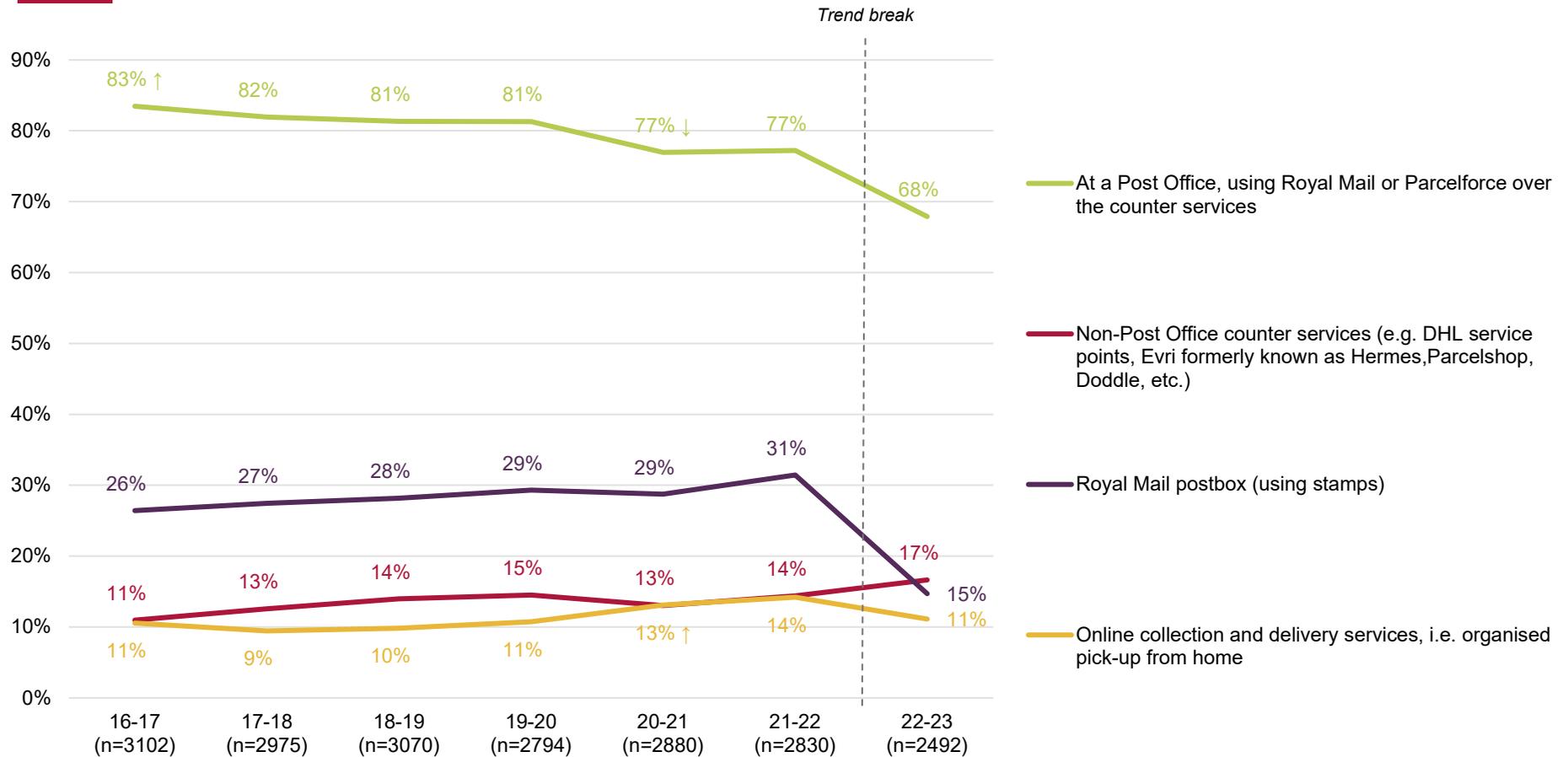Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Parcel sending

Parcel senders are less likely to be using Post Office or Royal Mail this year
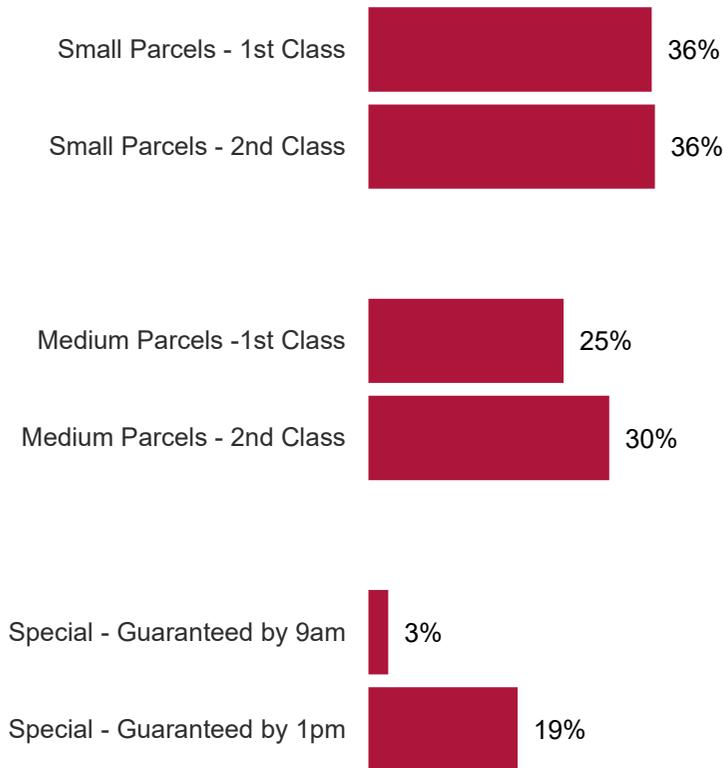
How parcels were sent

Trend break

At a Post Office, using Royal Mail or Parcelforce over the counter services
- 83% ↑ (16-17)
- 82% (17-18)
- 81% (18-19)
- 81% (19-20)
- 77% ↓ (20-21)
- 77% (21-22)
- 68% (22-23)

Royal Mail postbox (using stamps)
- 26%, 27%, 28%, 29%, 29%, 31%, 15%

Non-Post Office counter services (e.g. DHL service points, Evri formerly known as Hermes, Parcelshop, Doddle, etc.)
- 11%, 13%, 14%, 15%, 13%, 14%, 17%

Online collection and delivery services, i.e. organised pick-up from home
- 11%, 9%, 10%, 11%, 13% ↑, 14%, 11%

X-axis:
- 16-17 (n=3102)
- 17-18 (n=2975)
- 18-19 (n=3070)
- 19-20 (n=2794)
- 20-21 (n=2880)
- 21-22 (n=2830)
- 22-23 (n=2492)

Note that in 2022-23 we included those sending items which need a signature/other important items.

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Royal Mail users are likely to choose 2nd Class options for sending medium parcels, while those using other providers state cost as a key reason
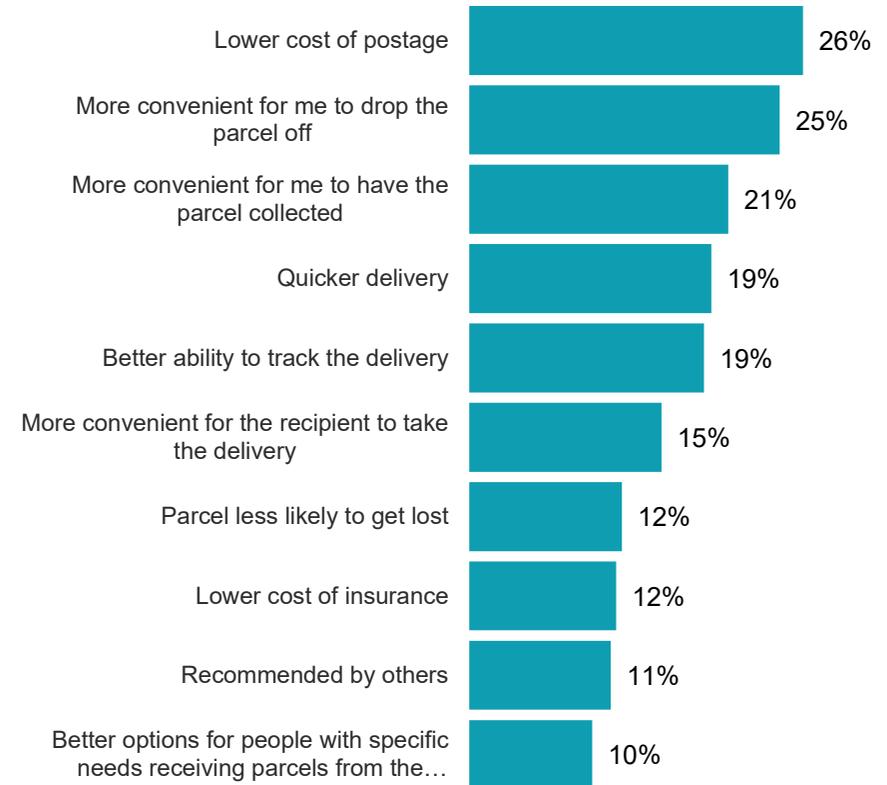
Parcel sending options

Royal Mail service used

Service	%
Small Parcels - 1st Class	36%
Small Parcels - 2nd Class	36%
Medium Parcels -1st Class	25%
Medium Parcels - 2nd Class	30%
Special - Guaranteed by 9am	3%
Special - Guaranteed by 1pm	19%

Why chose a non-Royal Mail Provider
(Showing Top 10 reasons)

Reason	%
Lower cost of postage	26%
More convenient for me to drop the parcel off	25%
More convenient for me to have the parcel collected	21%
Quicker delivery	19%
Better ability to track the delivery	19%
More convenient for the recipient to take the delivery	15%
Parcel less likely to get lost	12%
Lower cost of insurance	12%
Recommended by others	11%
Better options for people with specific needs receiving parcels from the…	10%

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Cost is usually one of the top 3 factors when considering which Postal provider to use

Importance of cost when choosing providers

Legend: ■ Don't know ■ Not at all important (1) ■ Not very important (2) ■ Neither important nor unimportant (3) ■ Important (4) ■ Very important (5)   **NET Important**

Statement	Neither important nor unimportant (3)	Important (4)	Very important (5)	NET Important
Low cost (when selecting a provider for Post you are receiving) — 1st out of 18 statements	10%	48%	39%	**86%**
Low cost (when selecting a provider for Parcels you are sending) — 3rd out of 18 statements	13%	47%	36%	**84%**
Free Delivery (when selecting a provider for Post you are receiving) — 8th out of 18 statements	15%	41%	40%	**81%**
Same price to send to anywhere within the UK (when selecting a provider for Parcels you are sending) — 6th out of 18 statements	14%	45%	36%	**81%**

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Ease of complaining among senders is highest among the smaller providers, satisfaction with complaints resolution also tends to be higher

Provider Complaints Summary

	Royal Mail	Evri	Parcel-force	Amazon Logistics	Collect +	DPD	Yodel	UK Mail	DHL	UPS	FedEx	TNT	Other Postal Service
Used to send	53%	18%	12%	12%	8%	8%	8%	7%	7%	6%	6%	4%	3%
among senders…													
Experienced **ANY** problems	33%	36%	23%	29%	34%	31%	33%	38%	35%	38%	50%	53%	51%
Made a complaint to Provider	16%	26%	19%	28%	30%	31%	31%	36%	37%	37%	48%	53%	53%
among those complaining…													
Ease of making complaint (NET Easy)	67%	56%	73%	74%	70%	65%	64%	67%	68%	75%	76%	77%	68%

Satisfaction with… (NET Satisfied)

	Royal Mail	Evri	Parcel-force	Amazon Logistics	Collect +	DPD	Yodel	UK Mail	DHL	UPS	FedEx	TNT	Other Postal Service
How complaint was handled	66%	58%	71%	79%	73%	69%	81%	81%	73%	87%	77%	77%	74%
Resolution to your complaint	66%	55%	71%	75%	80%	65%	77%	68%	68%	72%	81%	72%	85%
Time taken to resolve complaint	64%	50%	79%	80%	70%	69%	84%	77%	68%	76%	75%	69%	80%

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Royal Mail Parcel senders are more likely to experience problems with Delayed Mail, senders with smaller providers face a wider array of issues

Problems Experienced Summary

%	ANY Provider	Royal Mail	Evri	Parcel-force	Amazon Logistics	Collect +	DPD	Yodel	UK Mail	DHL	UPS	FedEx	TNT	Other Postal Service
NET Used to send	65%	53%	18%	12%	12%	8%	8%	8%	7%	7%	6%	6%	4%	3%
NET Any Problems	39%	33%	36%	23%	29%	34%	31%	33%	38%	35%	38%	50%	53%	51%
Delayed mail	24%	20%	15%	11%	10%	16%	12%	12%	15%	16%	10%	21%	16%	18%
Lost mail	14%	9%	12%	6%	7%	11%	6%	8%	7%	7%	8%	12%	15%	15%
Damaged mail	12%	7%	9%	5%	7%	7%	5%	8%	10%	7%	7%	9%	11%	11%
Mis-delivered mail	10%	6%	6%	3%	4%	8%	7%	6%	10%	10%	9%	13%	14%	10%
Didn't allow sufficient time to answer the door	9%	5%	5%	4%	5%	4%	7%	4%	3%	8%	8%	11%	10%	8%
Mail that has been tampered with	5%	2%	3%	2%	3%	5%	5%	4%	6%	4%	9%	5%	9%	6%
Any other problems	2%	1%	2%	0%	1%	1%	2%	1%	0%	0%	0%	1%	0%	0%

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.

Sustainability

Postal users are more likely to be willing to compromise on service than cost to deliver in a more sustainable way

Compromises to be more sustainable

Legend: ■ Don't know ■ Strongly disagree (1) ■ Slightly disagree (2) ■ Neither agree nor disagree (3) ■ Slightly agree (4) ■ Strongly agree (5) **NET Agree**

Statement	Don't know	Strongly disagree (1)	Slightly disagree (2)	Neither agree nor disagree (3)	Slightly agree (4)	Strongly agree (5)	NET Agree
I would prefer postal services to be delivered in an environmentally sustainable way, even if it takes a little longer	2%	9%	11%	29%	33%	16%	**49%**
I would be willing to use a parcel provider that operates in an environmentally responsible way even if the items take longer to deliver	2%	10%	17%	30%	32%	9%	**42%**
I would prefer postal services to be delivered in an environmentally sustainable way, even if I had to pay more for it	2%	15%	16%	31%	26%	11%	**36%**
I would be willing to pay more for a parcel provider that operates in an environmentally responsible way	1%	14%	20%	32%	25%	7%	**32%**
I would be willing to pay more AND wait longer for a parcel provider that operates in an environmentally responsible way	1%	18%	24%	28%	22%	7%	**29%**

Arrows denote significant positive or negative change vs previous time period. Significance testing to 95%.