



Measuring user experience of parcel delivery to residential addresses

Fieldwork January/July 2026

Published Report | October 2026



Objectives & Methodology

This study has been conducted over eight waves to date - two waves in 2023 (Wave 1: January 23 and Wave 2: July / August 23), two waves in 2024 (Wave 3: January /February 24 and Wave 4: July 24), two waves in 2025 (Wave 5: January 25 and Wave 6: July 25), and two waves in 2026 (Wave 7: January 26 and Wave 8: July 26). Data collected from the two waves within each calendar year have been combined to provide annual statistics that are based on large, reliable sample sizes. Basing annual statistics on data collected at two separate points within the year reduces the risk of seasonal variations in service impacting the data. Throughout this report, 'significant ' data changes refer to those that can be asserted with statistical confidence rather than a subjective comment on the margin of change.

In 2026, an online survey was conducted by Yonder Consulting and completed by **4,179 people** aged 16+. The sample comprised 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 recipients when receiving parcel deliveries. Specifically, Ofcom are seeking track the following over time:

- 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 recipients with impacting/limiting conditions, and the reported quality of service they receive from delivery companies, and the experiences of recipients with impacting/limiting conditions when sending parcels.
- Compare any differences in experience of those living in urban/rural areas.
- Further details on how the research defined recipients with impacting/limiting conditions and those in urban and rural areas and are set out in Appendix 2.

* We do not show or report on any delivery company specific data with a sample size of less than 100, in order to ensure statistically robust analysis.

Summary of key findings

1

Overall, seven in ten respondents (71%) reported experiencing an issue with any delivery operator in 2026. This proportion is a statistically significant* increase compared to previous years (68% in 2025 and 67% in 2024). Specifically, the proportion of parcel recipients who experienced an issue relating to non-delivery or delay (39%) and courier/ transit (54%) has increased from 2025 to 2026.

2

The average overall satisfaction with parcel deliveries in 2026 was 75%, which is a statistically significant decrease compared to last year's findings at 78%. There were no regional differences in parcel delivery satisfaction. Dissatisfaction with parcel deliveries has not significantly changed since 2025.

3

Among those who had contacted a delivery company about an issue in the last 6 months, on average 43% were satisfied across all elements of the contact process, which is a statistically significant decrease from 2025 (47%). The elements of the contact process where satisfaction had declined most since 2025 were: contacting the delivery company to discuss the issue; and whether the issue was resolved.

4

Parcel recipients with disabilities or limiting conditions were more likely to report issues with parcel deliveries than those without and reported a decrease in average satisfaction across all elements of the contact process compared to last year.

*Throughout this report, 'significant ' data changes refer to those that can be asserted with statistical confidence, rather than being a subjective comment on the margin of change.

Delivery issues have been grouped for analysis as follows:

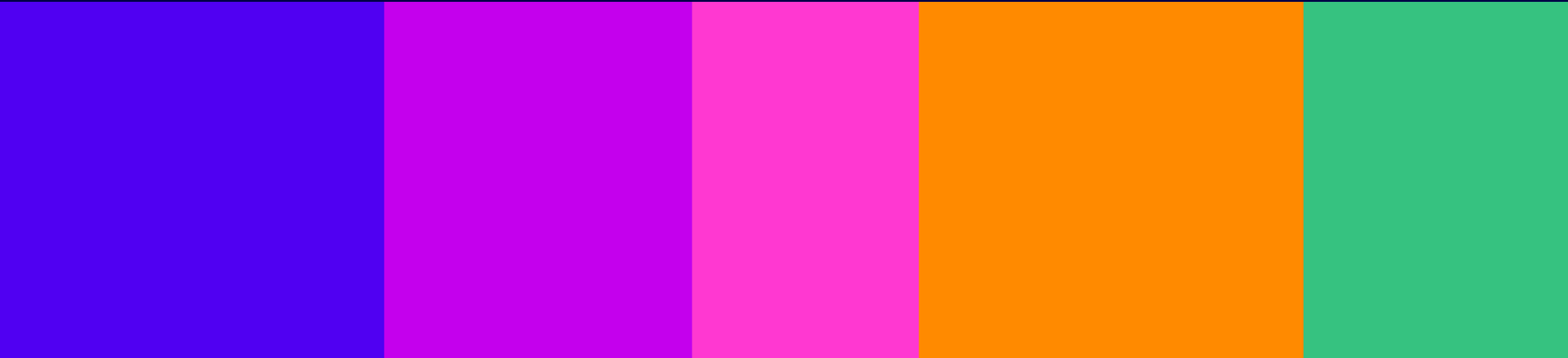


NET*: Not delivered on time as expected	NET: Accessibility issues	NET: Courier/transit issues	NET: Lack of information / options
Parcel was not delivered	Parcel collection point was not convenient	Parcel was damaged	Inconvenient options for delivery
Parcel delivery was delayed	I was not given sufficient 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)		

The term “NET” is used to describe a group of different responses, as indicated in the table.

Section 1

Experience of delivery issues



Across all delivery companies, just under two in five (37%) recipients had experienced a delivery issue in the last 6 months in 2026



Experience of issues (Top 10) – by company (2026 data)

Significantly higher/lower than the average at 95% confidence

Average across all delivery companies		DHL	Parcelforce	DPD	UPS	FedEx	Royal Mail	Yodel	DX Delivery	TNT Express	Amazon	Evri	NET: Any company*
NET: Any issues experienced	37%	28%	27%	29%	29%	29%	36%	41%	37%	38%	45%	51%	71%
Parcel delivery was delayed	10%	5%	7%	5%	4%	5%	13%	9%	7%	8%	10%	18%	32%
Parcel left in inappropriate location	8%	4%	3%	5%	4%	2%	4%	9%	4%	3%	15%	15%	28%
Delivery person did not knock loudly enough or ring the doorbell	8%	5%	5%	6%	3%	3%	5%	9%	4%	4%	15%	14%	25%
I was not given sufficient time to answer the door	7%	3%	4%	5%	3%	4%	4%	7%	3%	3%	12%	10%	20%
Parcel was not delivered	5%	2%	3%	3%	2%	3%	5%	5%	4%	3%	5%	10%	19%
Parcel was not left in my nominated safe space	5%	3%	2%	4%	3%	3%	4%	6%	2%	3%	9%	9%	18%
Parcel was damaged	5%	3%	3%	2%	3%	2%	4%	4%	6%	2%	7%	8%	17%
Did not attempt to deliver in person*	5%	3%	3%	3%	3%	2%	6%	5%	2%	3%	5%	8%	17%
Incorrect or insufficient tracking information	4%	3%	3%	2%	4%	3%	5%	5%	4%	3%	2%	8%	14%
The process for selecting a timeslot was not accessible to me	4%	3%	3%	3%	2%	4%	4%	4%	5%	5%	3%	5%	9%

Source: Ofcom Quality of postal services survey Jan/Jul-26

Q3. Delivery issues - all experienced: Which, if any, of the following issues have you experienced with these delivery companies in the last 6 months?

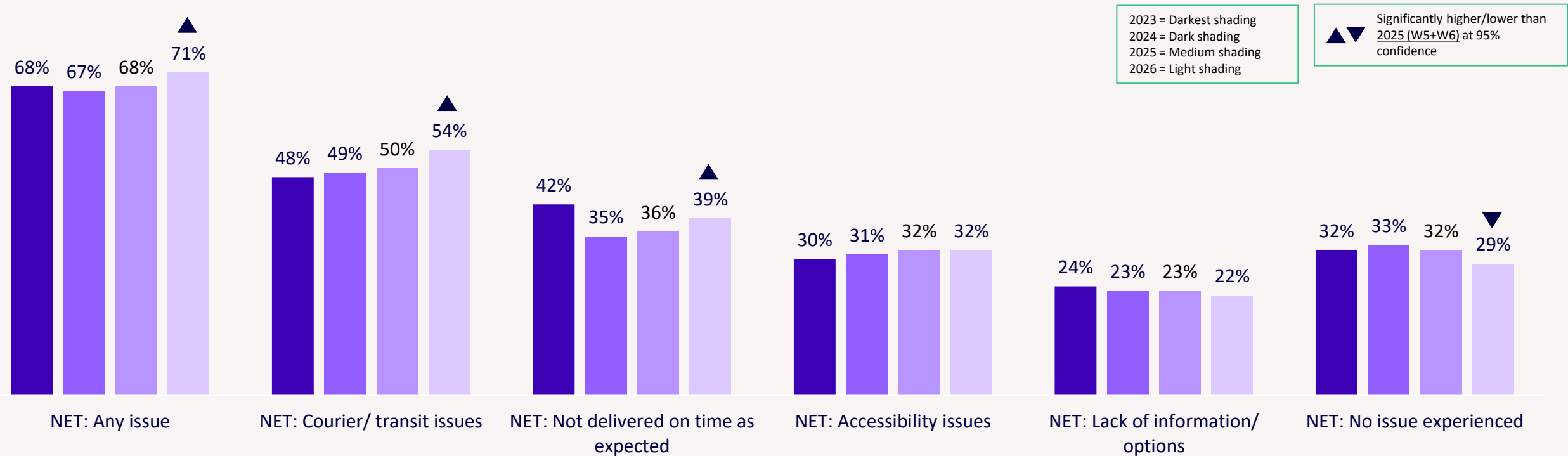
Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2026: Total (4179), Royal Mail (3887), DHL (1685), DPD (2875), FedEx (737), Evri (3464), Parcelforce (1864), TNT Express (320), UPS (911), Yodel (2004), Amazon (3694), DX Delivery Service (430), Average across companies (1988). The average across companies was calculated by adding up all scores and dividing by the number of delivery companies.. * Full text: Did not attempt to deliver in person (e.g. left 'you were not in' card even when I was at home to collect parcel)

*NET: Any company column reports on the proportion of each issue experienced across all recipients who have used at least one delivery company in the last 6 months

In 2026, seven in ten (71%) parcel recipients reported experiencing any issue with any operator. Courier / transit issues remained the most common



Experience of delivery issues – NET Any delivery company (2023 vs 2024 vs 2025 vs 2026 data)



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q3. Delivery issues - all experienced: Which, if any, of the following issues have you experienced with these delivery companies in the last 6 months? Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/JUL 2026: Total (2032/2147). Annual total 2024/2025/2026 (4048/4058/4179)

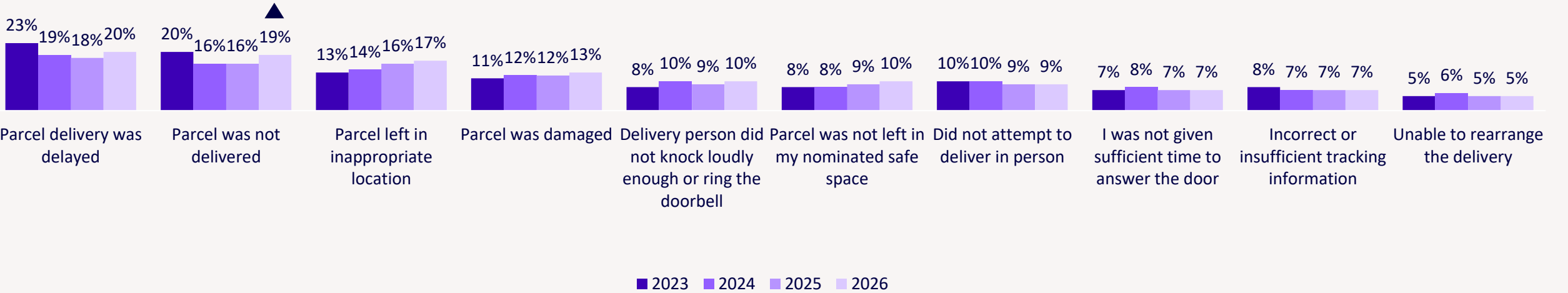
In 2026, parcel recipients were more likely to contact delivery companies about undelivered parcels compared to the previous year, with delayed parcels consistently the most common reason for contact



Issues for which contact was made (Top 10) – NET: Any (2023 vs 2024 vs 2025 vs 2026 data)

2023 = Darkest shading
2024 = Dark shading
2025 = Medium shading
2026 = Lighter shading

▲▼ Significantly higher/lower than 2025 at 95% confidence



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q4. Issue contact - screener: You said you have had the following issues with [delivery company] in the last 6 months. Which, if any, have you contacted the delivery company about?

Q4. Base: All respondents who have experienced an issue with [delivery company] in the past 6 months JAN/JULY 2024/ JAN/JULY 2025/ JAN/JULY 2026: Total (2706/2738/2940)

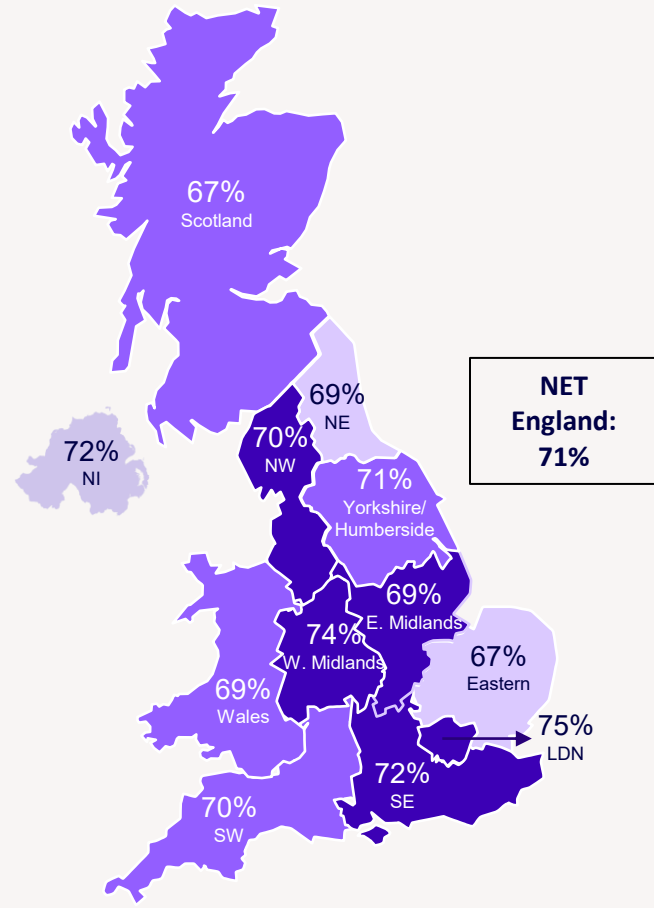
The experience of delivery issues was regionally consistent, though recipients in Scotland reported fewer courier/transit and accessibility issues than the UK average



Experience of delivery issues – **NET Any delivery company (2026) / Region**

NET: Any issue: 71%

Those living in **Urban (71%)** areas and **Rural (69%)** areas have similar experiences of issues overall



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

NET: Courier / transit issues (54%):
Wales 56%
England 55%
Scotland 48% ↓
Northern Ireland 48%

NET: Lack of information (22%):
England 22%
Scotland 24%
Northern Ireland 25%
Wales 19%

NET: Accessibility (32%):
England 34%
Northern Ireland 30%
Scotland 22% ↓
Wales 28%

NET: Not delivered on time as expected (39%):
Scotland 36%
England 39%
Wales 38%
Northern Ireland 44%

NET: No issue experienced (29%):
Northern Ireland 28%
Wales 31%
England 29%
Scotland 33%

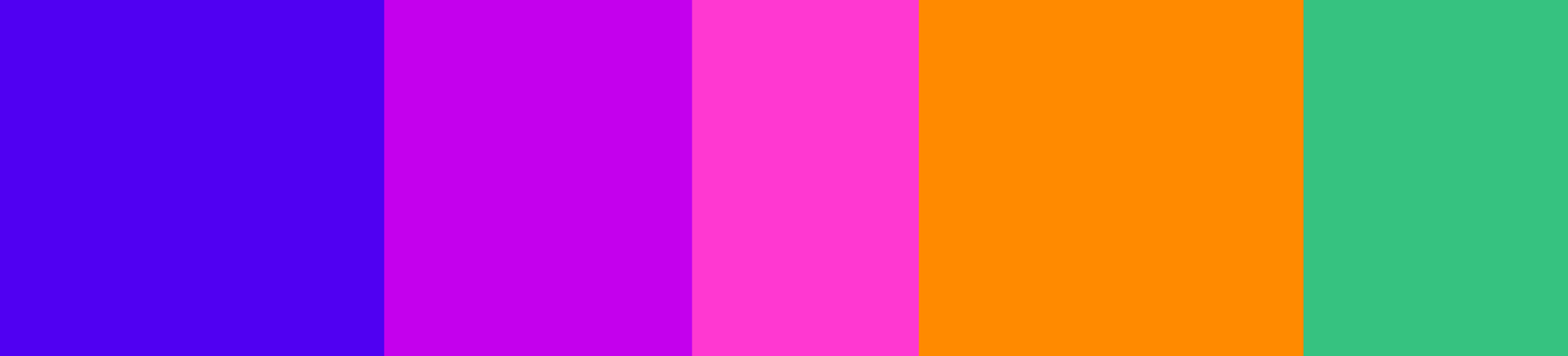
Source: Ofcom Quality of postal services survey Jan/Jul-26

Q3. Delivery issues - all experienced: Which, if any, of the following issues have you experienced with these delivery companies in the last 6 months?

Q3. Base: All respondents who have used [delivery company] in the past 6 months 2026: Total (4179), North East (173), North West (428), Yorkshire and the Humber (369), West Midlands (358) East Midlands (308), East of England (433), London (514), South East (555), South West (382), Scotland (323), Wales (210), Northern Ireland (126), NET England (3520), Urban (3315), Rural (472)

Section 2

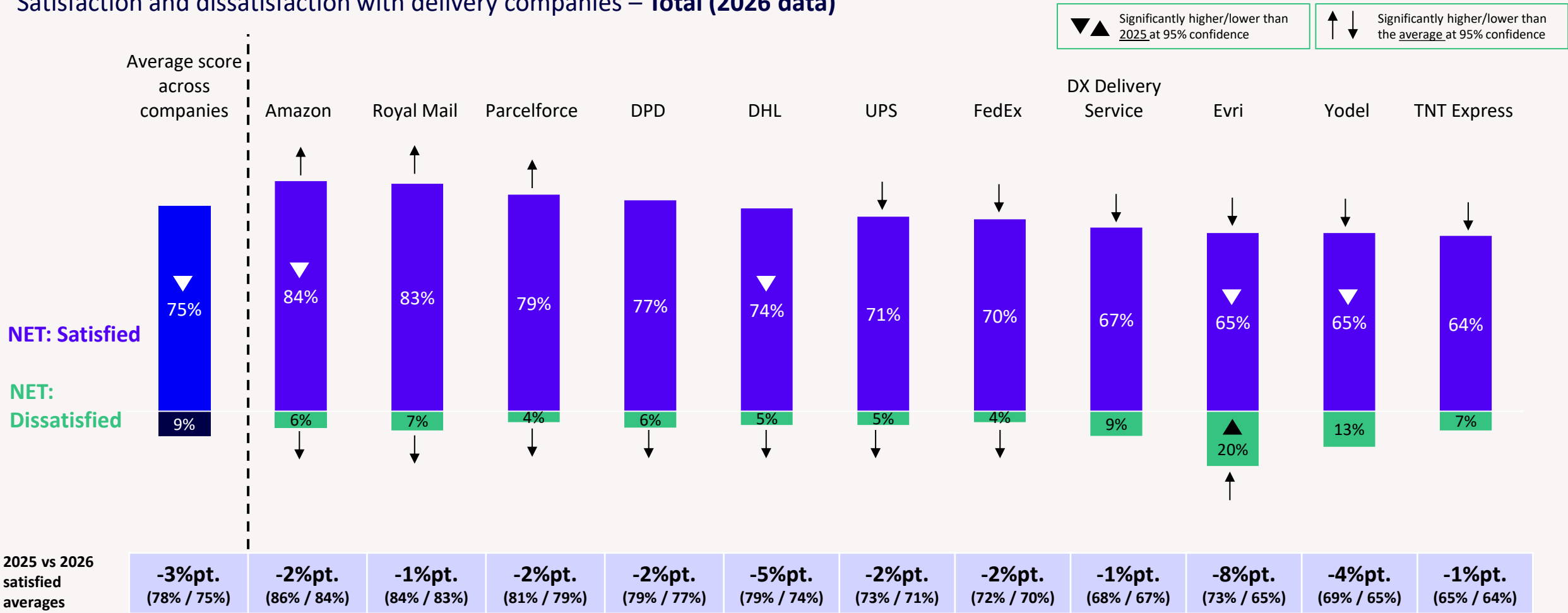
Satisfaction with delivery companies



Since 2025, there has been a significant decline in average satisfaction with parcel deliveries, particularly among Amazon, DHL, Evri and Yodel recipients



Satisfaction and dissatisfaction with delivery companies – Total (2026 data)



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q2. Satisfaction with delivery: And over the past 6 months, how satisfied or dissatisfied are you with your deliveries from ...?

Q2. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2026: Total (4179), Royal Mail (3887), DHL (1685), DPD (2875), FedEx (737), Evri (3464), Parcelforce (1864), TNT Express (320), UPS (911), Yodel (2004), Amazon (3694), DX Delivery Service (430), Average across companies (1988).

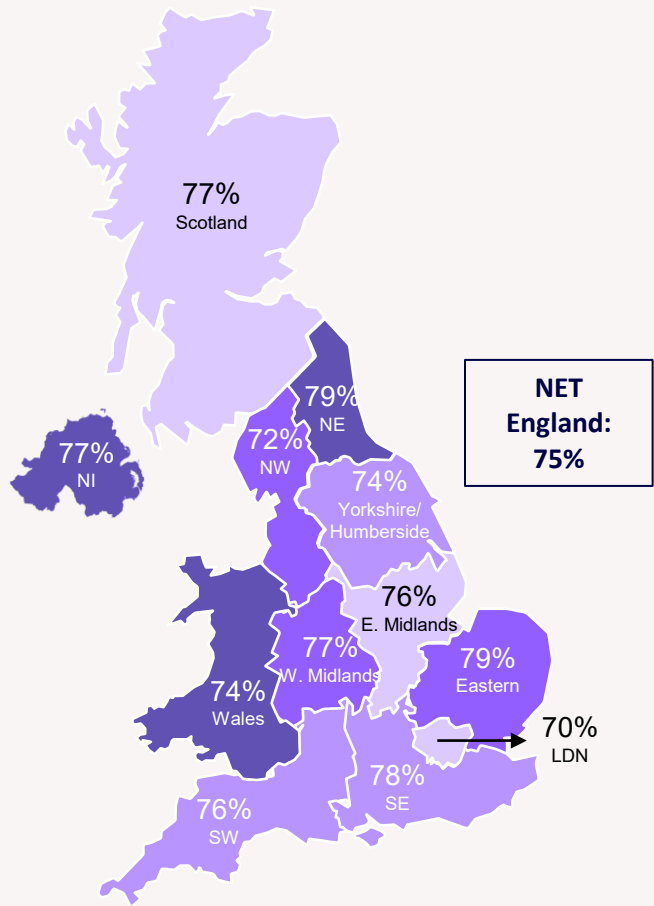
The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

Overall satisfaction with deliveries is consistent across nations and regions

Satisfaction and dissatisfaction with delivery companies – **NET Average across delivery company (2026) / Region**

↑ ↓ No significant differences compared to Average at 95% confidence

NET: Satisfied: 75%



On average, there were **no significant** differences in satisfaction for those living in **Urban (75%)** and **Rural (79%)** areas

Source: Ofcom Quality of postal services survey Jan/Jul-26

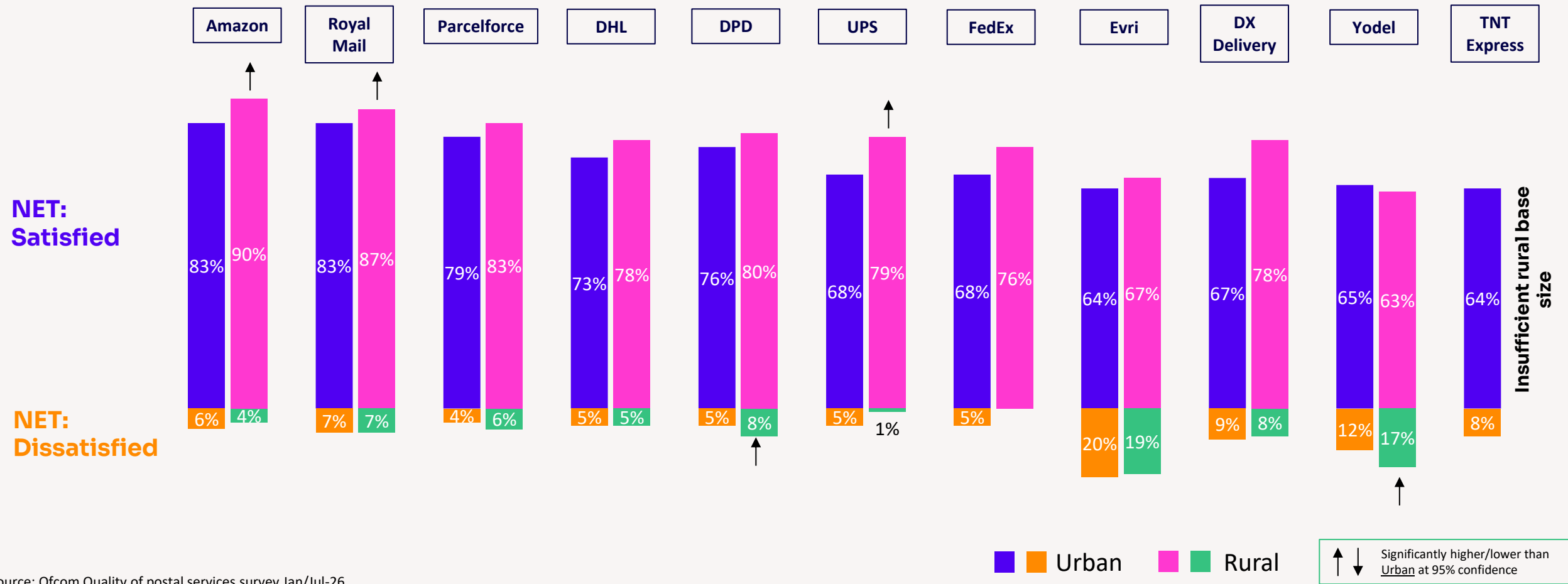
Q2. Satisfaction with delivery: And over the past 6 months, how satisfied or dissatisfied are you with your deliveries from ...?

Q2. Base: All respondents who have used [delivery company] in the past 6 months 2026: Total (4179), North East (173), North West (428), Yorkshire and the Humber (369), West Midlands (358) East Midlands (308), East of England (433), London (514), South East (555), South West (382), Scotland (323), Wales (210), Northern Ireland (126), NET England (3520), Urban (3315), Rural (472)

Though rural recipients were more satisfied with Amazon, Royal Mail and UPS, overall experiences were consistent across urban and rural recipients



Satisfaction and dissatisfaction with delivery companies – Urban vs Rural (2026 – based on postcodes)



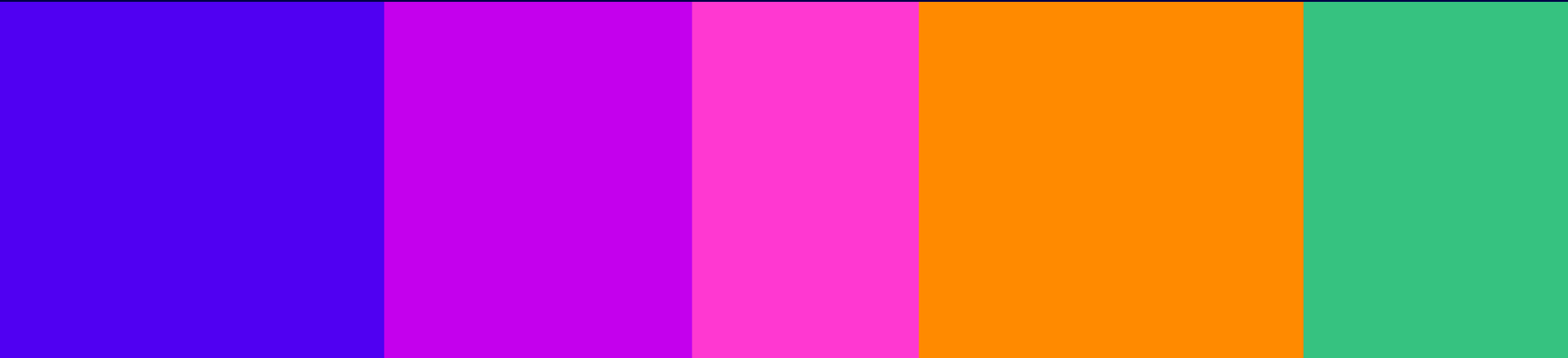
Source: Ofcom Quality of postal services survey Jan/Jul-26

Q2. Satisfaction with delivery: And over the past 6 months, how satisfied or dissatisfied are you with your deliveries from ...?

Q2. Base: All respondents who have used [delivery company] in the past 6 months 2026: Total (3126 Urban, 434 Rural), Royal Mail (3081 Urban, 445 Rural), DHL (1288 Urban, 213 Rural), DPD (2256 Urban, 358 Rural), FedEx (545 Urban, 88 Rural), Evri (2725 Urban, 419 Rural), Parcelforce (1466 Urban, 238 Rural), TNT Express (230 Urban, 38 Rural), UPS (690 Urban, 114 Rural), Yodel (1572 Urban, 235 Rural), Amazon (2947 Urban, 409 Rural), DX Delivery Service (323 Urban, 60 Rural) Excluded due to small base size below 50.

Section 3

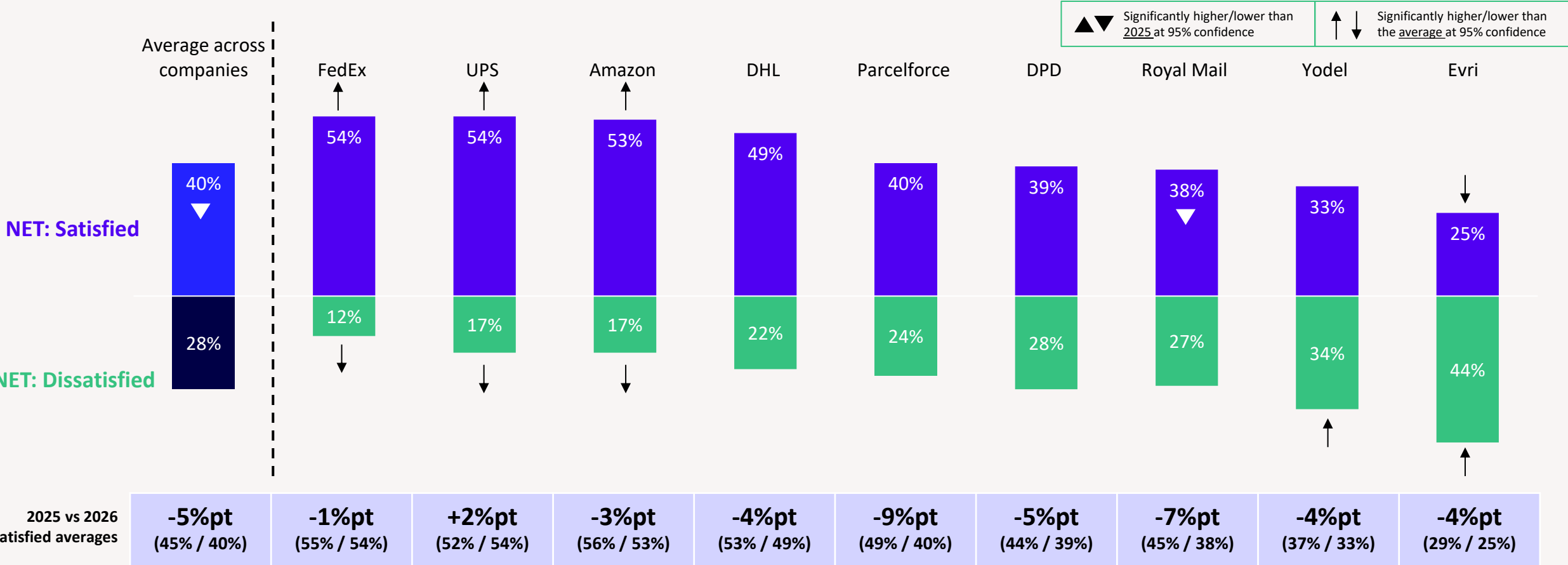
Satisfaction with the contact process



Among those who contacted an operator in the last 6 months, average satisfaction with contacting a delivery company to discuss an issue declined in 2026, with two in five (40%) recipients satisfied with the process



Satisfaction and dissatisfaction with contact process - **Contacting the delivery company to discuss an issue (2026 data)**



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q6. Complaint satisfaction: Thinking about the last time you contacted [delivery company], how satisfied were you with the following aspects of the contact process?

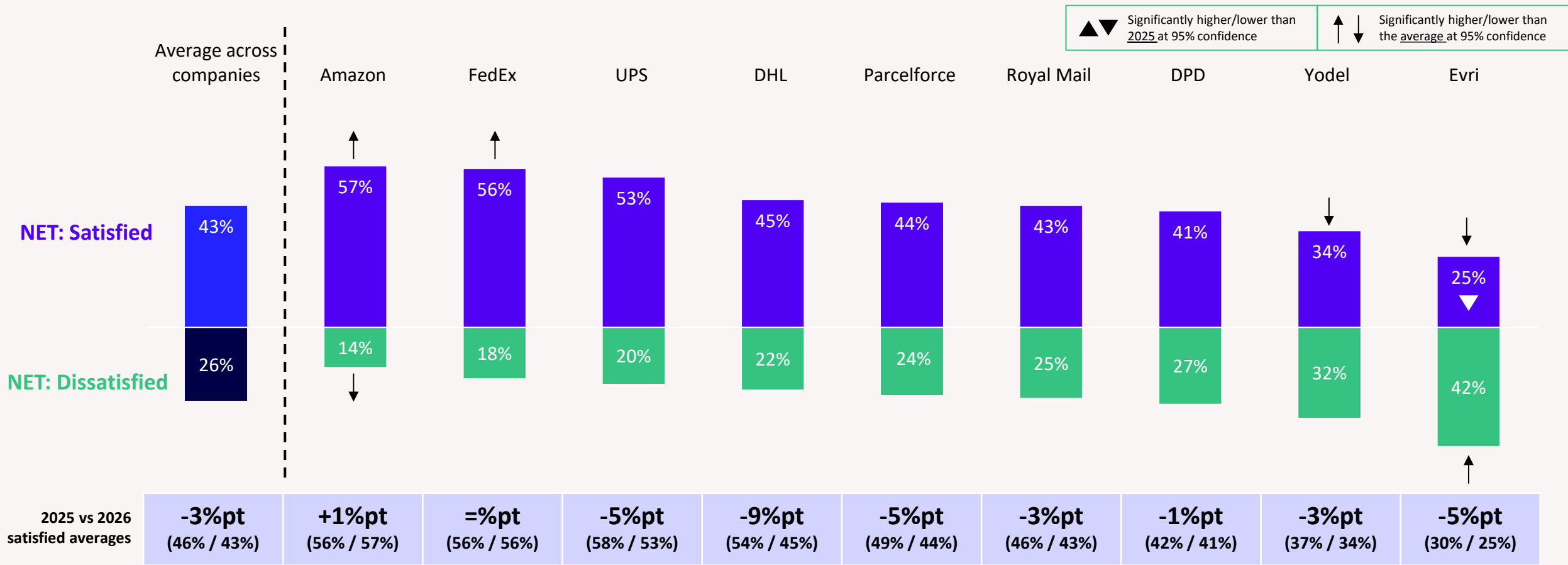
Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2026: Total (1808), Royal Mail (601), DHL (211), DPD (345), FedEx (100), Evri (890), Parcelforce (213), UPS (111), Yodel (364), Amazon (801), DX Delivery (91), TNT Express (64). The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

Results for delivery companies with sample sizes of less than 100 have not been shown

On average, 43% of those who contacted an operator were satisfied with how their complaint was handled by staff. Satisfaction among those who contacted Evri decreased since 2025



Satisfaction and dissatisfaction with contact process - **How your contact or complaint was handled by staff at the delivery company (2026 data)**



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q6. Complaint satisfaction: Thinking about the last time you contacted [delivery company], how satisfied were you with the following aspects of the contact process?

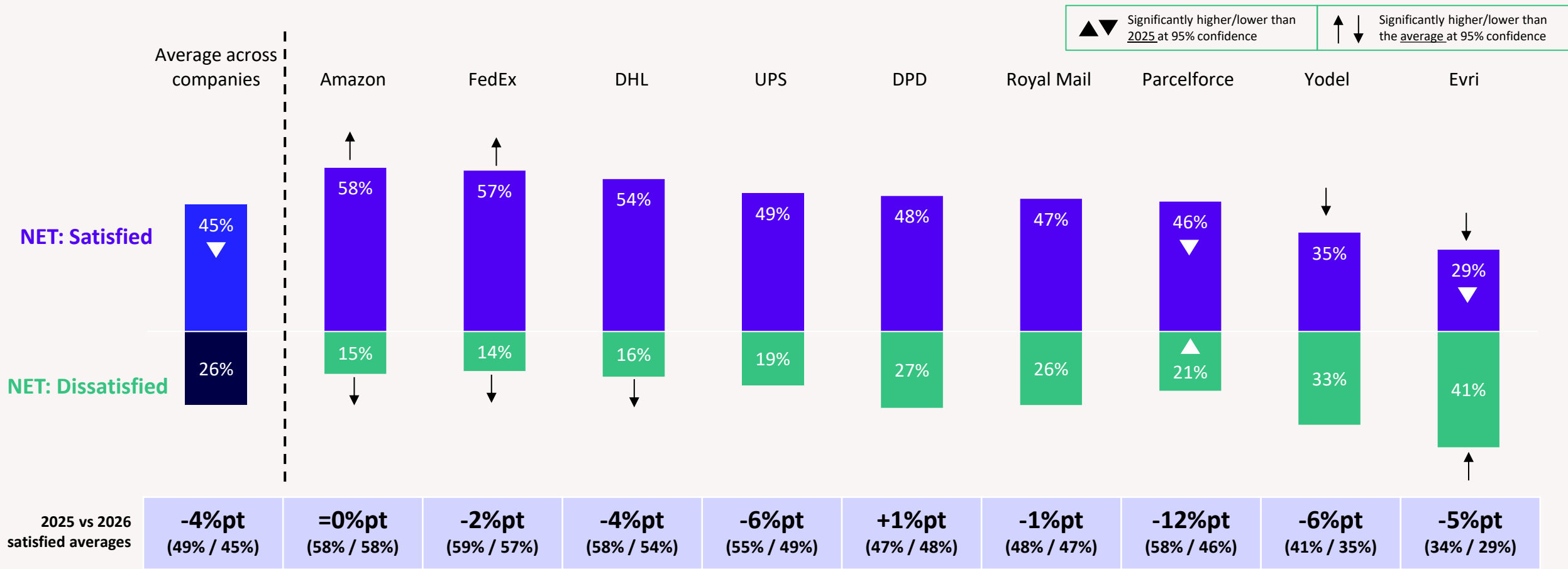
Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2026: Total (1808), Royal Mail (601), DHL (211), DPD (345), FedEx (100), Evri (890), Parcelforce (213), UPS (111), Yodel (364), Amazon (801), DX Delivery (91), TNT Express (64).The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

Results for delivery companies with sample sizes of less than 100 have not been shown

On average, 45% of those contacting a delivery company were satisfied that their issue was resolved, a decrease from 2025 (49%)



Satisfaction and dissatisfaction with contact process - **That your issue was resolved (2026 data)**



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q6. Complaint satisfaction: Thinking about the last time you contacted [delivery company], how satisfied were you with the following aspects of the contact process?

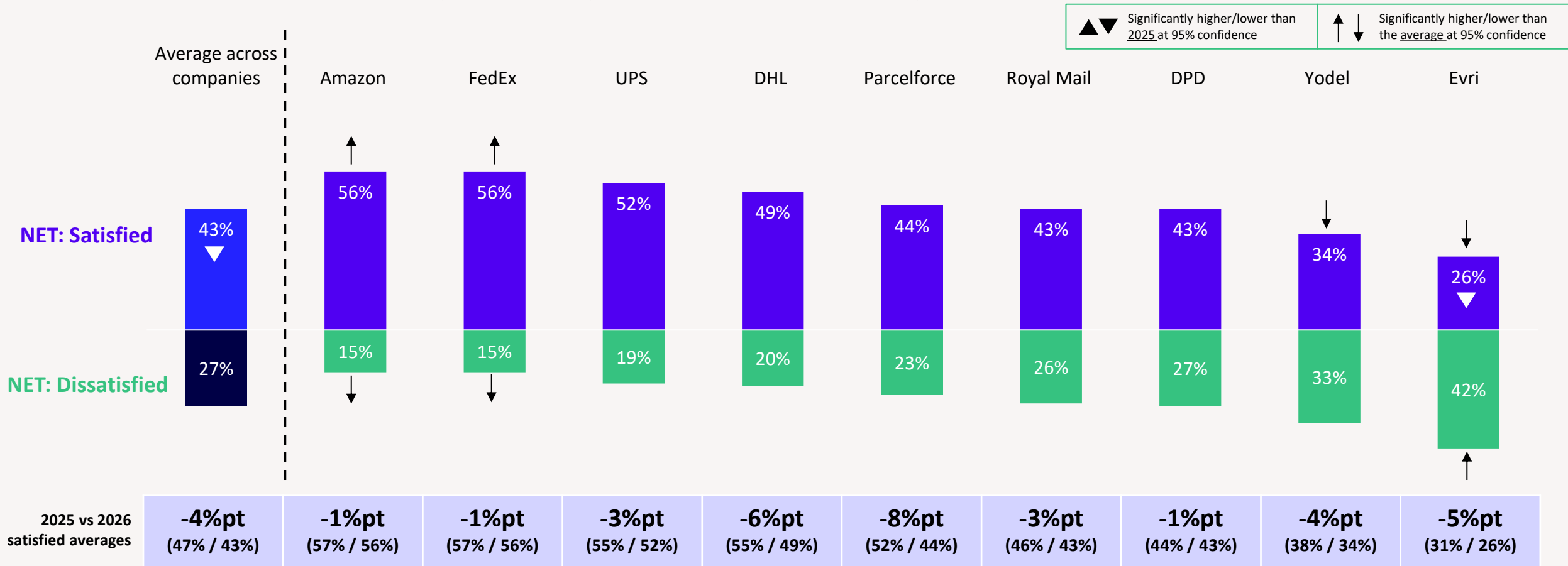
Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2026: Total (1808), Royal Mail (601), DHL (211), DPD (345), FedEx (100), Evri (890), Parcelforce (213), UPS (111), Yodel (364), Amazon (801), DX Delivery (91), TNT Express (64).The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

Results for delivery companies with sample sizes of less than 100 have not been shown

Across the three elements of the contact process, on average, just over two in five of those who made contact were satisfied, a significant decrease from 2025 (47%)



Satisfaction and dissatisfaction with contact process - **Average across elements of the contact process (2026 data)**



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q6. Complaint satisfaction: Thinking about the last time you contacted [delivery company], how satisfied were you with the following aspects of the contact process?

Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2026: Total (1808), Royal Mail (601), DHL (211), DPD (345), FedEx (100), Evri (890), Parcelforce (213), UPS (111), Yodel (364), Amazon (801), DX Delivery (91), TNT Express (64).The “Average across companies score” was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

Results for delivery companies with sample sizes of less than 100 have not been shown

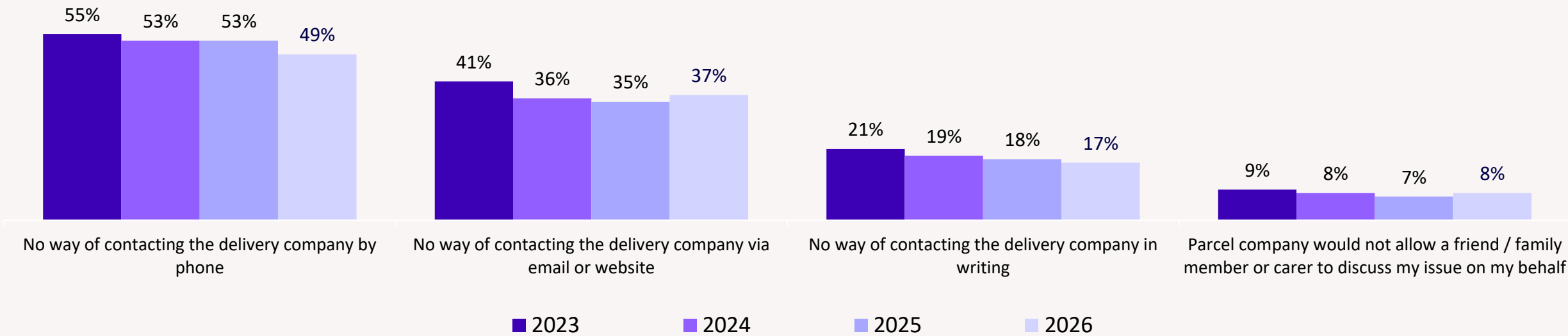
Nearly half (49%) of those dissatisfied with contacting a delivery company reported this was because they were unable to reach the company by phone



Reason for dissatisfaction with contact – **NET: Any company (2024 VS 2025 VS 2026 data)**

2023 = Darkest shading
2024 = Dark shading
2025 = Medium shading
2026 = Lighter Shading

▲ ▼ No significant differences compared to 2025 at 95% confidence



Source: Ofcom Quality of postal services survey Jan/Jul-26

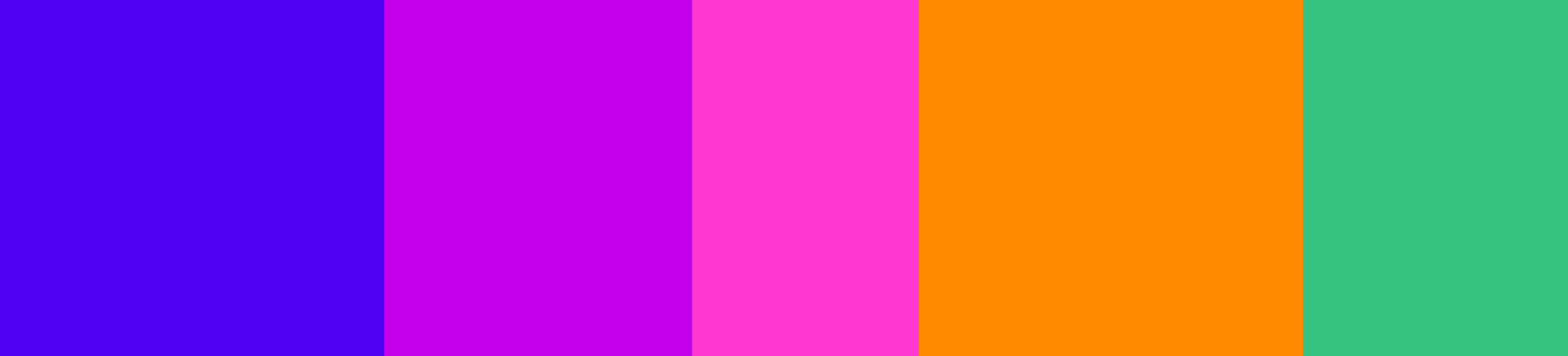
Q7. Difficulty in contact: Why were you dissatisfied with the process of contacting [delivery company]?

Q7. Base: All respondents who have contacted [delivery company] and were dissatisfied JAN 2026/ JUL 2026: Net Any (762)

Reasons mentioned by less than 5% have not been shown

Section 4

Suggested service improvements



Just under eight in ten (79%) parcel recipients reported that they would like to see at least one service improvement – in line with the 2025 data (78%)



Suggested improvements (Top 10) – NET: Any company (2026 data)



▲ ▼ No significant differences compared to 2025 at 95% confidence

2025 vs 2026

+1%pt. (78% / 79%)	=%pt. (18% / 18%)	=%pt. (16% / 16%)	=%pt. (15% / 15%)	+1%pt (13% / 14%)	+2%pt (11% / 13%)	=%pt. (11% / 11%)	=%pt. (11% / 11%)	=%pt. (10% / 10%)	=%pt. (9% / 9%)	-1%pt. (10% / 9%)
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Source: Ofcom Quality of postal services survey Jan/Jul-26

Q8. QoS: Of the following areas, in which would you most like to see improvement on the part of the delivery companies that have delivered to you in the last 6 months

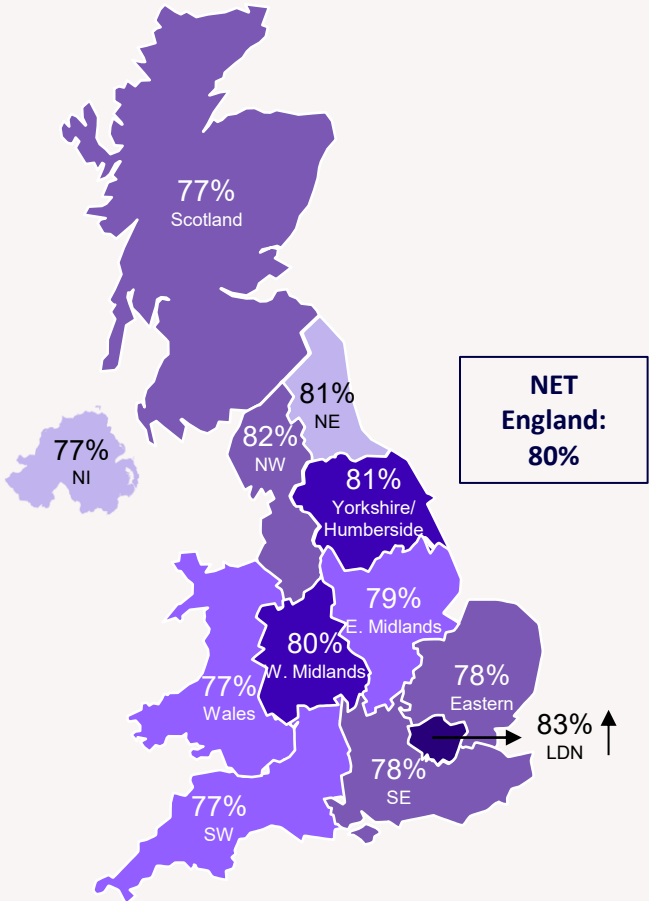
Q8. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2026: (4179)

Those living in urban areas, and particularly those in London, were significantly more likely to want improvements across delivery services

Suggested improvements – NET Any delivery company (2026) / Region

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

NET: Any
improvement: 79%



Those living in **Urban** areas are significantly more likely to want to see improvements across delivery services (**80%**) than those living in **Rural** areas (**74%**)

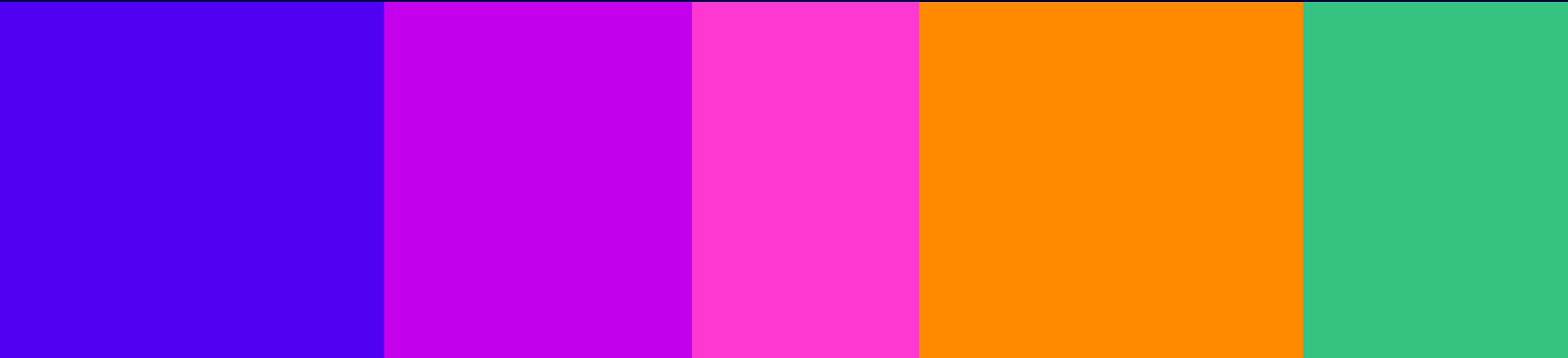
Source: Ofcom Quality of postal services survey Jan/Jul-26

Q8. QoS: Of the following areas, in which would you most like to see improvement on the part of the delivery companies that have delivered to you in the last 6 months

Q8. Base: All respondents who have used [delivery company] in the past 6 months 2026: Total (4179), North East (173), North West (428), Yorkshire and the Humber (369), West Midlands (358) East Midlands (308), East of England (433), London (514), South East (555), South West (382), Scotland (323), Wales (210), Northern Ireland (126), NET England (3520), Urban (3315), Rural (472)

Section 5

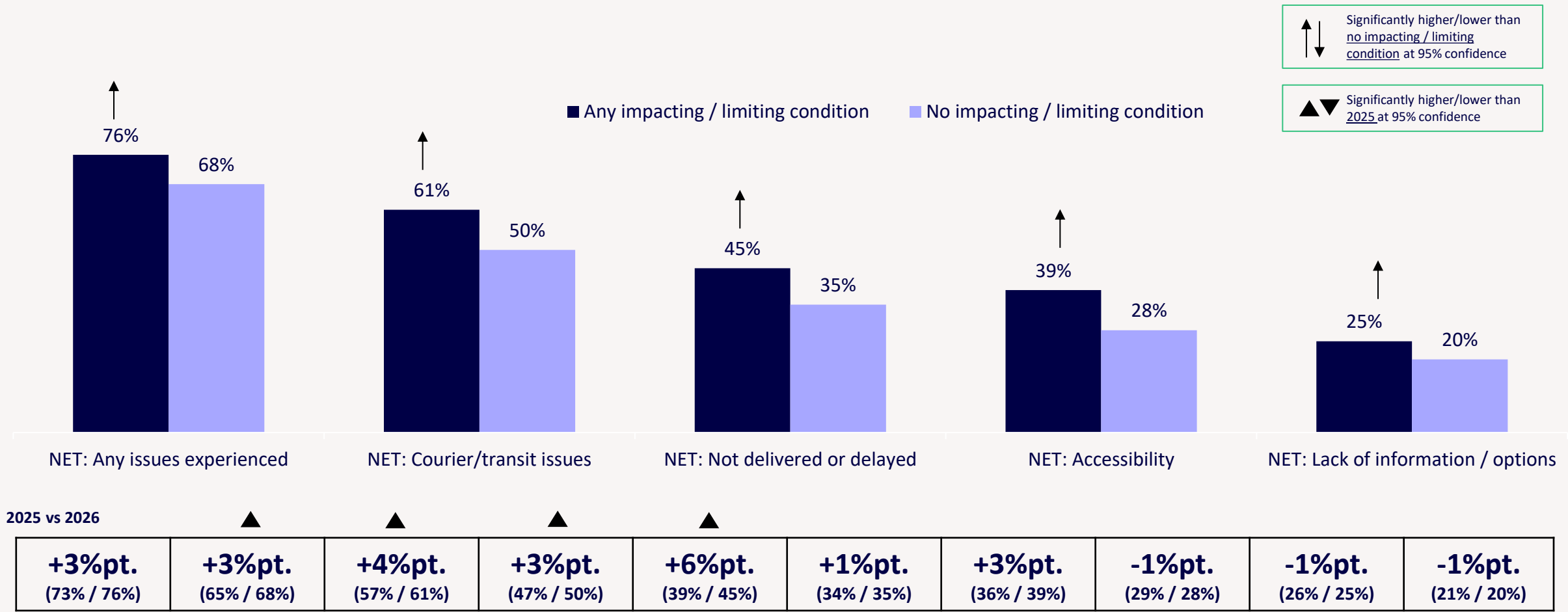
Users with an impacting / limiting condition



Recipients with impacting/limiting conditions remained significantly more likely to report issues with delivery services in 2026 than those without



Experience of issues across all delivery companies – **those with impacting / limiting conditions (2026 data)**



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q3. Delivery issues - all experienced: Which, if any, of the following issues have you experienced with these delivery companies in the last 6 months?

Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2025 COMBINED: Total (4048), Any impacting/limiting condition (1448), No impacting/limiting condition (2495); JAN/JULY 2026 COMBINED: Total (4179), Any impacting/limiting condition (1470), No impacting/limiting condition (2583)

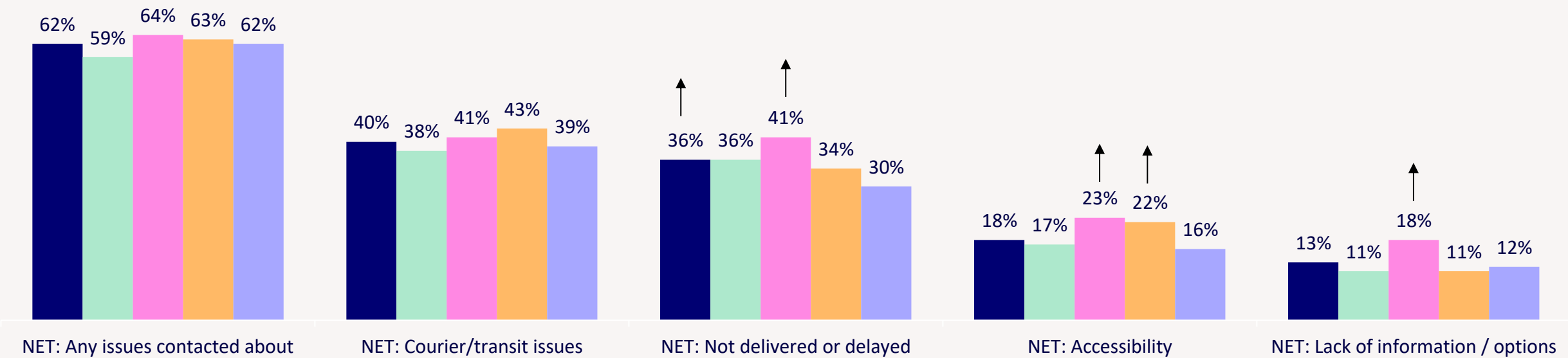
Parcel recipients with eyesight conditions were more likely to contact delivery companies about various issues compared to those with no impacting / limiting conditions



Issues contacted about – any company (2026 data)

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

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



Source: Ofcom Quality of postal services survey Jan/Jul-26

Q4. Issue contact - screener: You said you have had the following issues with [delivery company] in the last 6 months. Which, if any, have you contacted the delivery company about

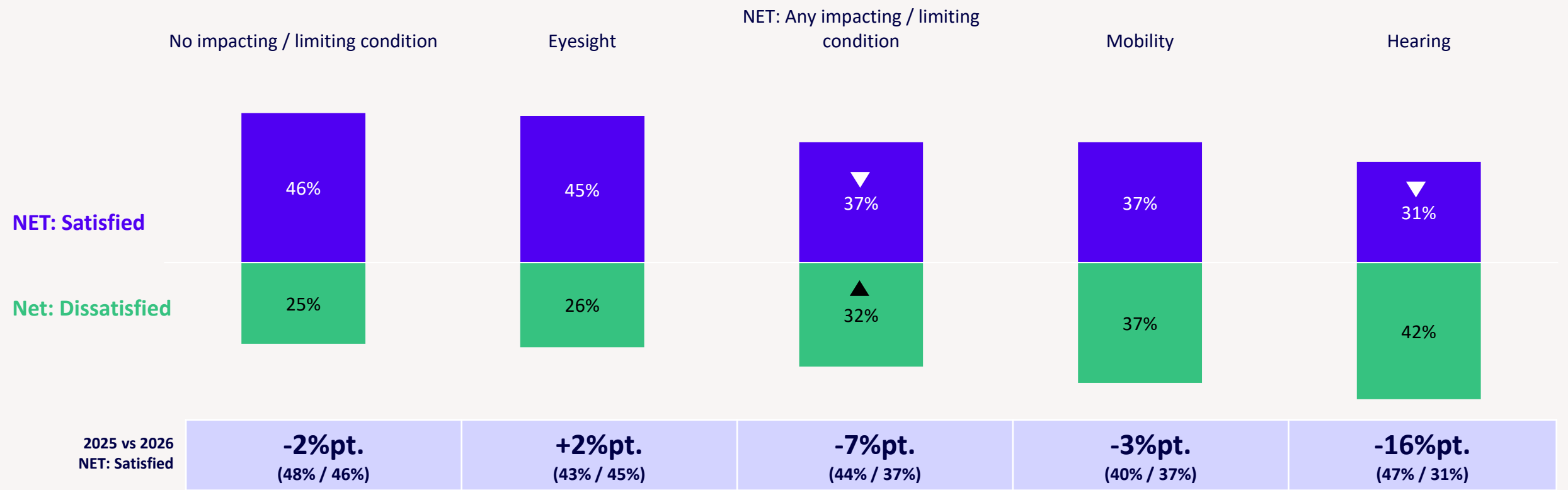
Q4. Base: All respondents who have experienced an issue with [delivery company] in the past 6 months JAN/JULY 2025: Total (2738), Any impacting/limiting condition (1059), Hearing (169), Eyesight (163), Mobility (295) No impacting/limiting condition (1609); JAN/JULY 2026: Total (2940), Any impacting/limiting condition (1116), Hearing (230), Eyesight (167), Mobility (302) No impacting/limiting condition (1740)

Average satisfaction across the contact process fell for recipients with any limiting / impacting condition, particularly for those with hearing conditions



Satisfaction with complaints service among those with an impacting/limiting condition -
Average across elements of the contact process (2026 data)

▲ ▼ Significantly higher/lower than 2025 at 95% confidence



Source: Ofcom Quality of postal services survey Jan/July-26

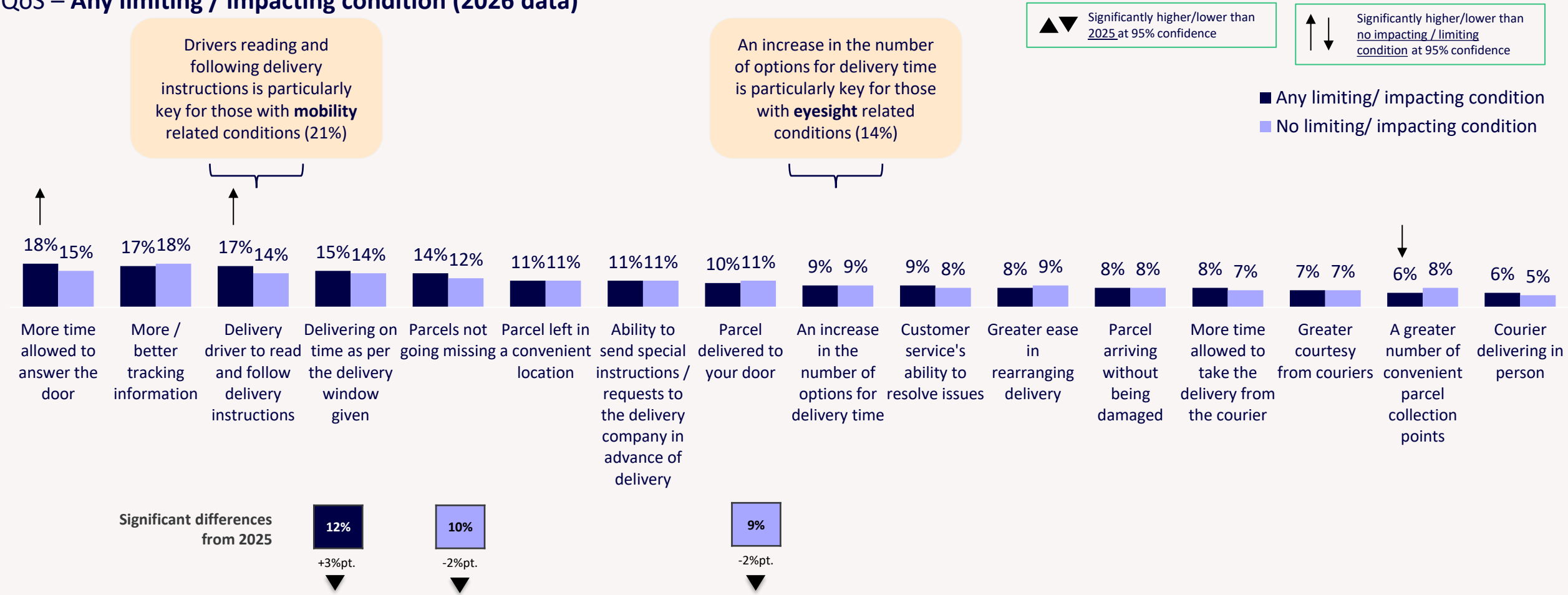
Q6. Complaint satisfaction: Thinking about the last time you contacted [delivery company], how satisfied were you with the following aspects of the contact process?

Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2026 Any impacting/limiting condition (687), Hearing (135), Eyesight (107), Mobility (189) No impacting/limiting condition (1063). These satisfaction scores represent the average proportion of the group who were satisfied/dissatisfied with contact process elements with any of the providers that they had contacted.

Recipients with limiting/impacting conditions were more likely to want to see improvements, such as having more time to answer the door and drivers to follow instructions



QoS – Any limiting / impacting condition (2026 data)

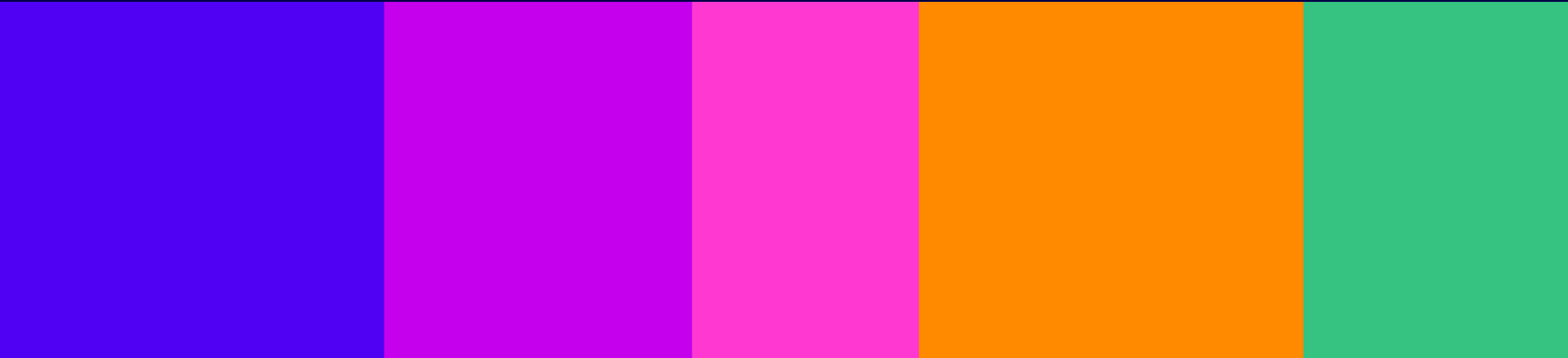


Source: Ofcom Quality of postal services survey Jan/Jul-26

Q8. QoS: Of the following areas, in which would you most like to see improvement on the part of the delivery companies that have delivered to you in the last 6 months

Q8. Base: All respondents who have used [delivery company] in the past 6 months JAN / JUL 2025: Any impacting/limiting condition (1448), No limiting/ impacting condition (2495); JAN / JUL 2026: Any impacting/limiting condition (1470), No limiting/ impacting condition (2583);

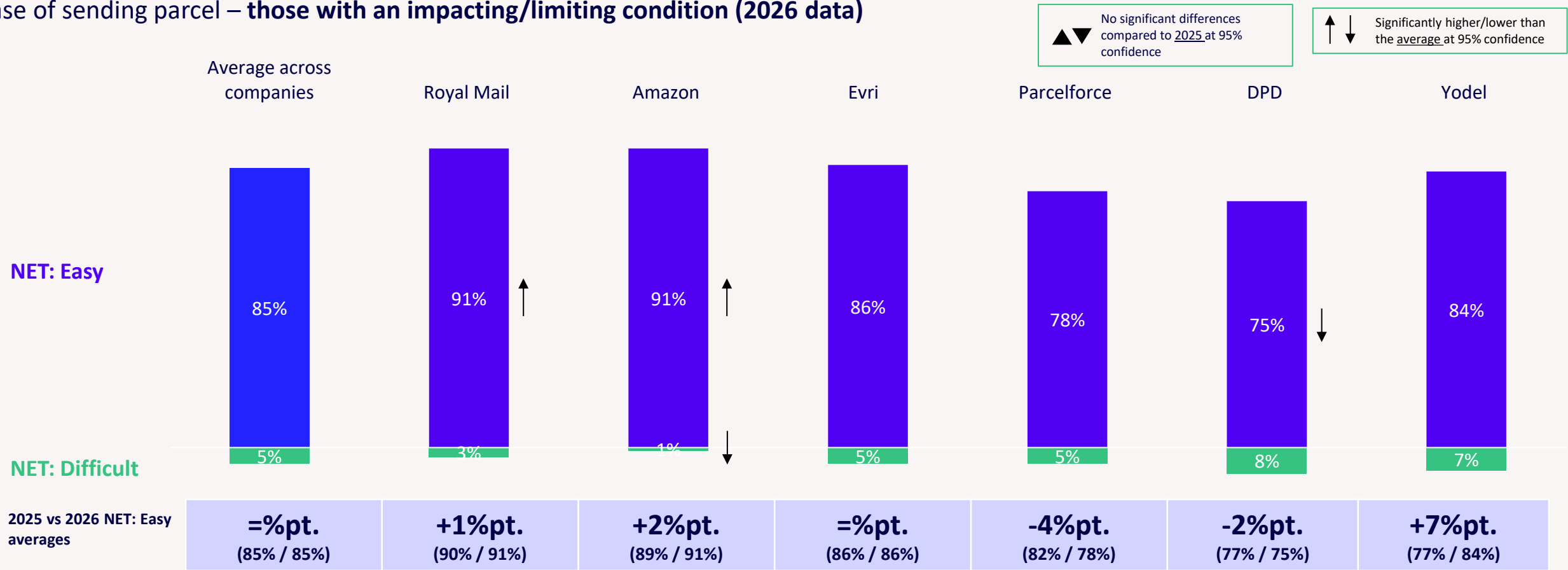
Appendix 1: Experience of sending parcels for those with an impacting / limiting condition



The majority of parcel senders who have an impacting or limiting condition reported the process of sending a parcel to be easy



Ease of sending parcel – those with an impacting/limiting condition (2026 data)



Source: Ofcom Quality of postal services survey Jan/Jul-26

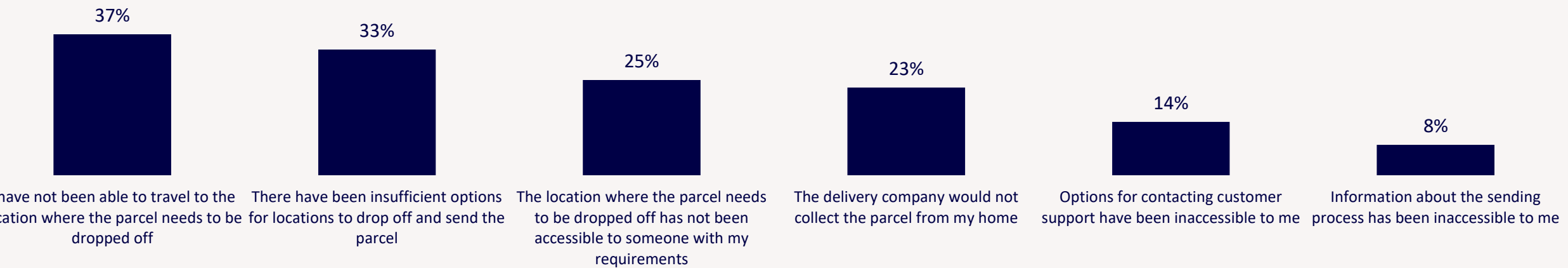
Q10. Ease of sending a parcel: You said you've used the following companies to send a parcel. In general, how easy or difficult have you found that process in the

Q10. Base: All respondents (with an impacting/limiting condition) who have used [delivery company] to send a parcel JAN/JULY 2026: Average (231), Royal Mail (1039), DPD (168), Evri (492), Parcelforce (200), Yodel (165), Amazon (271), Delivery companies with a sample size of less than 100 are not shown.

Parcel senders with an impacting or limiting condition often faced challenges due to not being able to travel to drop off locations and insufficient location options

Difficulty in sending – those with a limiting/impacting condition by NET: Any company (2026 data)

▲▼ No significant differences compared to 2025 at 95% confidence



2025 vs 2026 averages

+9%pt. (28% / 37%)	+4%pt. (29% / 33%)	+2%pt. (23% / 25%)	+7%pt. (16% / 23%)	-5%pt. (19% / 14%)	-5%pt. (13% / 8%)
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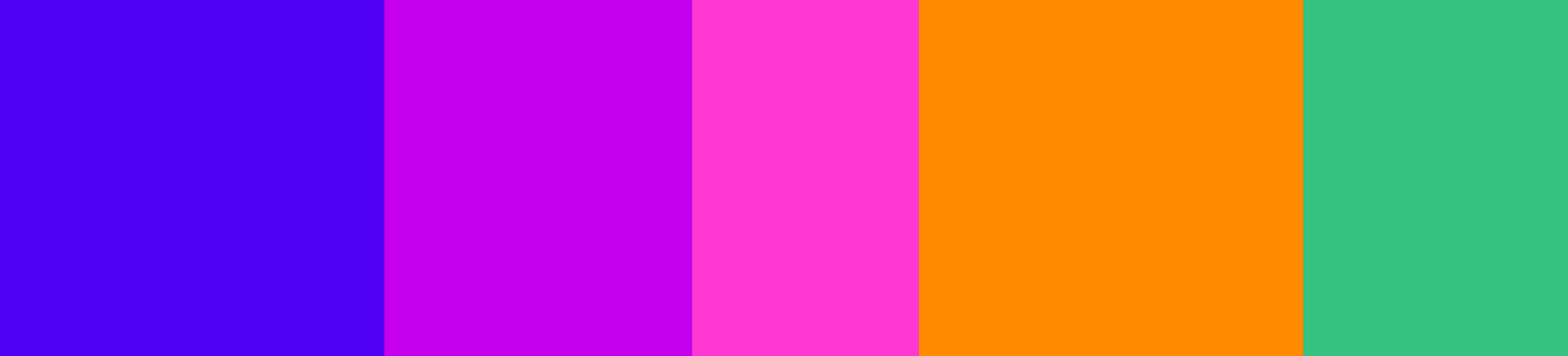
Source: Ofcom Quality of postal services survey Jan/Jul-26

Q11. Reason for difficulty: You said you have found the process of sending a parcel with the following companies difficult in the past. Why is that?

Q11. Base: All respondents with a limiting/impacting condition who have used [delivery company] to send a parcel and found it difficult JAN/JULY 2026: NET: Any company (102)

Appendix 2:

Methodological notes



Urban vs. Rural Analysis

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.

Since July 2023 respondents were offered the opportunity to share their post code anonymously. These post codes are associated with survey responses and mapped to urban or rural locations. We note that respondents could decline to provide their post code, however the majority do.

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

Impacting / limiting conditions

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