Background

The aim of this research was to provide Ofcom with a basic up-to-date understanding of residential consumers’ use of, and attitudes towards, key areas of the postal service.

Areas covered include:

- Volume and type of post sent
- Volume and type of post received
- Awareness of the cost of standard stamps
- Use of different class and sized stamps
- Experience of problems with postal services
- Satisfaction with elements of the postal service
- Attitude towards postal services and other methods of communication

This research is in addition to more in-depth and large scale residential consumer and business research going ahead in 2012.

Methodology

Residential consumers across the UK were asked questions about their use of, and attitudes towards, postal services.

Questions were asked on Gfk NOP’s quantitative omnibus between 1st and 13th December.

- All consumers were asked to focus on a ‘typical’ month and asked not to consider their atypical Christmas behaviour
- Fieldwork was carried out as early as possible in December in order to get as much fieldwork completed before the Christmas posting rush

Consumers were only asked questions about the postal services if they had some responsibility for opening or sending mail. The 6% who claimed ‘I am not responsible for opening or sending any mail in my household’ were excluded from this research as they could not answer the questions. This resulted in an overall sample of 3621 consumers who were responsible for sending or receiving post.

A large sample of consumers were interviewed to enable demographic subgroup analysis. NB Analysis by social grade can be used as a proxy for analysis by income levels. Over half of respondents refuse to provide their data on their income, therefore analysis by income level is incomplete and inaccurate.

Data was weighted to be representative of the UK population generally.
Additional notes

On the across break on the tables it is clear which respondents are included in the columns in most cases (e.g. based on age, socio-economic grade and gender), however the following information is required for less obvious groups:

- UK Geographies groups (see www.ukgeographics.co.uk information on LOCALE Group Classification for more detail)
  - A
  - B
  - C
  - D
  - E
  - F
  - G

- Urban definitions (Based on the above UK Geographics LOCALE groups, see www.ukgeographics.co.uk for more detail)
  - ‘Large towns/cities’ = UK Geographics groups A & B
  - ‘Large towns/cities excluding London’ = UK Geographics groups A & B but without London (NB London = within M25)
  - ‘London only’ (NB London = within M25)
  - ‘Suburban’ UK Geographics groups C & D
  - ‘Rural’ = UK Geographics groups E, F & G
  - ‘Deep Rural’ = UK Geographics groups ES12, and G
  - ‘Any urban’= UK Geographics groups A, B, C & D
Questions

The next questions are mainly about Royal Mail services and other postal services operators you use. Please think about your personal use, rather than any use as part of a business.

QS1 Which of the following statements best describes your role when opening and sending mail in your household? READ OUT. SINGLE CODE

1. I am responsible for opening and sending all mail in my household
2. I am responsible for opening and sending some mail in my household
3. I am not responsible for opening or sending any mail in my household

ASK ALL RESPONSIBLE FOR POST (QS1 CODES 01-02). OTHERS GO TO NEXT SECTION

Firstly I’d like you to think about the post that you send.

QA1 SHOWCARDPOST1 Approximately how many letters and cards, do you personally send in an average month? This should exclude any items you send from home in connection with running a business, if you do this from home. We will ask about parcels separately.

(INTERVIEWER BRIEFING NOTE: An average month does NOT include the Christmas month - want them to think about a typical month. This includes items sent with other companies as well as Royal Mail.)

IF RESPONDENT SAYS DON'T KNOW, PLEASE ASK TO GIVE BEST ESTIMATE

1. I don’t always send items each month
2. 1 or 2 items per month
3. 3 or 4 items per month
4. 5-10 items per month
5. 10-20 items per month
6. 20+ WRITE IN NUMBER
7. None/don’t send mail
8. Don’t know
9. Refused

QA2 Which of these types of mail would you say you send at least once a month by post? Please don’t think about parcels or packets when you are answering. READ OUT. RANDOMISE ORDER. MULTICODE. ALLOW RESPONDENT TO ANSWER “YES” OR “NO” TO ITEM BEFORE MOVING ON TO NEXT ITEM

1. Payment of bills including utilities, credit cards council tax etc
2. Official mail including legal, medical, insurance, etc
3. Social/ personal letters to friends
4. Invitations/ greeting or birthday cards/ postcards
5. Other (please specify)
6. None (do not read out)
7. Don’t know (do not read out)

ASK IF MORE THAN ONE TYPE AT PREVIOUS QUESTION (codes 01-05). OTHERS GO TO QA4

QA3 Which ONE of these types of mail would you say you send more often than any other by post? Please don’t think about parcels or packets when you are answering. READ OUT ITEMS MENTIONED AT Q3. SINGLE CODE.

1. Payment of bills including utilities, credit cards council tax etc
2. Official mail including legal, medical, insurance etc
3. Social/ personal letters to friends
4. Invitations/ greeting cards/ postcards
5. Other
6. None (do not read out)
7. Don't know (Do not read out)

ASK ALL (RESPONSIBLE FOR POST)
QA4 SHOWCARDPOST2 When sending letters/cards which do you use? SINGLE CODE.

1. First class all of the time
2. First class most of the time
3. First class and second class an equal amount
4. Second class most of the time
5. Second class all of the time
6. Other
7. Don't Know

QA5 SHOWCARDPOST3 And what proportion of these letters/cards have to be at their destination the next working day? READ OUT. SINGLE CODE

1. All of them
2. Most of them
3. About half of them
4. A small proportion of them
5. None of them
6. Other
7. Don't know

ASK ALL (RESPONSIBLE FOR POST)
QA7 SHOWCARDPOST4 Please now think about the parcels you send. How many parcels do you send in an average month?

IF RESPONDENT SAYS DON'T KNOW, PLEASE ASK TO GIVE BEST ESTIMATE (INTERVIEWER BRIEFING NOTE: An average month does NOT include the Christmas month - want them to think about a typical month. This includes items sent with other companies as well as Royal Mail. This should exclude any items you send from home in connection with running a business, if you do this from home.)

1. I don't always send a parcel each month
2. 1 or 2 items per month
3. 3 or 4 items per month
4. 5-10 items per month
5. 10-20 items per month
6. 20+ (please write in number)
7. None/don't send mail
8. Don't know
9. Refused

ASK IF SEND PARCELS IN AN AVERAGE MONTH (QA7 CODES 01-06). OTHERS GO TO QA10
QA8 Have you used any other postal operator apart from Royal Mail to send Parcels/ packets?

1. Yes
2. No
3. Don't know
ASK QA9 IF USED OTHER OPERATOR APART FROM ROYAL MAIL (QA8 CODE 01). OTHERS GO TO QA10

QA9 SHOWCARDPOST5 Which, if any, of these companies have you used to send a packet or parcel? INTERVIEWER NOTE IF NEEDED: Royal Mail delivers the post/parcels that are paid for by postage stamps. These tend to be sent through the post Office or letter boxes.

1. Royal Mail
2. Hermes (MyHermes)
3. Collect+(HDN)
4. DHL Service Point
5. UPS
6. Citilink
7. Others via Brokers; parcel to go etc
8. Other (please specify)
9. Don't know

ASK ALL (RESPONSIBLE FOR POST)

QA10 SHOWCARDPOST6 Which, if any, of the following Royal Mail services have you used to send something in the post in the last twelve months?

READ OUT: For recorded mail the cost is the price of normal sending plus 77p. For special delivery, prices start at £5.45. MULTICODE.

1. Recorded letter - provides proof that letter has been sent and received
2. Recorded parcel - provides proof that parcel has been sent and received
3. Special Delivery letter - guaranteed next day delivery and you receive a refund of the postage if the item does not arrive on time
4. Special Delivery parcel - guaranteed next day delivery and you receive a refund of the postage if the item does not arrive on time
5. One of the above, but not sure which
6. None
7. Don't know

SECTION: RECEIVING POST

I'd now like to ask you some questions about the mail you personally receive.

ASK ALL (RESPONSIBLE FOR POST)

QB1 SHOWCARDPOST7 Approximately how many letters or cards do you receive in an average week? Please don't include parcels, we will ask you about these separately.

(INTERVIEWER BRIEFING NOTE: An average week/month does NOT include the Christmas month - want them to think about a typical month. Can include items sent with other companies as well as Royal Mail. 'Mail received' includes addressed direct mail. This only refers to mail which is specifically addressed by name. Unaddressed mail should not be included.)

1. I don't always receive letters/cards each week
2. 1 or 2 items per week
3. 3 or 4 items per week
4. 5-10 items per week
5. 10-20 items per week
6. 20-30 items per week
7. 30-50 items per week
8. 50 +
9. Don't know
10. Refused
SHOWCARD POST8

Which of these would you say you personally receive at least once a month through your letterbox? MULTICODE.

(INTERVIEWER INSTRUCTIONS: “Official mail” e.g. a letter that deals specifically with an issue that has been raised. “Standard circulars” e.g. newsletters, leaflets detailing changes to terms and conditions of financial products etc. from an organisation that you already have an association with as a member or customer.)

1. Invitations / greetings cards / postcards
2. Social/Personal letters, e.g. from friends
3. Official mail, e.g. legal, medical, insurance etc
4. Standard circulars from organisations
5. Bills/invoices/statements
6. Local newspapers/magazines
7. Magazine subscriptions or other periodicals
8. Catalogues/brochures
9. Products you have ordered ( packets/ parcels)
10. Unaddressed mail
11. Addressed advertising mail
12. Other
13. None
14. Don't know

ASK IF MORE THAN ONE TYPE AT PREVIOUS QUESTION. OTHERS GO TO QB4

SHOWCARD POST8

Which one of these types of mail would you say you personally receive more often than any other? ONLY SHOW ITEMS MENTIONED AT PREVIOUS QUESTION. SINGLE CODE.

1. Invitations / greetings cards / postcards
2. Social/Personal letters, e.g. from friends
3. Official mail, e.g. legal, medical, insurance etc
4. Standard circulars from organisations
5. Bills/invoices/statements
6. Local newspapers/magazines
7. Magazine subscriptions or other periodicals
8. Catalogues/brochures
9. Products you have ordered ( packets/ parcels)
10. Unaddressed mail
11. Addressed advertising mail
12. Other
13. None
14. Don't know

ASK ALL (RESponsible for POST)

SHOWCARD POST9

Approximately how many parcels do you receive on average in a month?

(INTERVIEWER BRIEFING NOTE: An average month does NOT include the Christmas month - want them to think about a typical month. Can include items sent with other companies as well as Royal Mail.)

1. I don't always receive a parcel each month
2. 1 or 2 items per month
3. 3 or 4 items per month
4. 5-10 items per month
5. 10-20 items per month
6. 20+ WRITE IN NUMBER
7. None/don't send mail
8. Don't know
SECTION: STAMPS / CLASS OF POST
The next questions are about stamps and first and second class mail.

ASK ALL
QC1 What is the cost of the stamp to send a standard size letter by 1st class post?
IF NEEDED: If you don't know how much a single stamp costs, you could tell me how much a book of 6 or 12 stamps cost instead.

INTERVIEWER NOTE: ONLY ONE ANSWER NEEDS TO BE GIVEN.
SINGLE STAMP - WRITE IN __ __ p
BOOK OF 6 STAMPS - WRITE IN __ __ p
BOOK OF 12 STAMPS - WRITE IN __ __ p
Don't know

ASK ALL
QC2 What is the cost of the stamp to send a standard size letter by 2nd class post?
IF NEEDED: If you don't know how much a single stamp costs, you could tell me how much a book of 6 or 12 stamps cost instead.

INTERVIEWER NOTE: ONLY ONE ANSWER NEEDS TO BE GIVEN.
SINGLE STAMP - WRITE IN __ __ p
BOOK OF 6 STAMPS - WRITE IN __ __ p
BOOK OF 12 STAMPS - WRITE IN __ __ p
Don't know

ASK ALL
QC3 Which of these types of stamps do you personally use?
INTERVIEWER NOTE IF NEEDED: Large letter stamps are for A4 documents, CDs and DVDs in their cases, certificates, some large greeting cards with badges and most magazines.
MULTICODE POSSIBLE

1. Standard sized 1st class stamps
2. Standard sized 2nd class stamps
3. Large 1st class stamps
4. Large 2nd class stamps
5. None
6. Don't know

ASK IF USE LARGE STAMPS ABOVE (QC3 CODES 03-04). OTHERS GO TO QC5
QC4 What types of mail do you use large stamps for?
PRECODE, MULTICODE

1. Greeting Cards
2. Gifts (parcels)
3. Packets
4. Official letters
5. Other (write in )
6. Don't know
ASK ALL (RESPONSIBLE FOR POST)
QC5  SHOWCARDPOST12 What do you take into consideration when deciding whether to send mail by 1st or by second class post? CODE ALL THAT APPLY

1. Cost of postage
2. Speed of delivery
3. Not wanting others to think that I am unwilling to use a 1st class stamp
4. Value of the item
5. Security/privacy
6. Other (please specify)
7. NONE
8. DON'T KNOW

ASK ONLY IF MORE THAN ONE FACTORS MENTIONED AT ABOVE QUESTION. OTHERS GO TO QD1
QC6  SHOWCARD POST12 AGAIN And which is the most important factor that you consider out of these? CODE ONE ONLY

1. Cost of postage
2. Speed of delivery
3. Not wanting others to think that I am unwilling to use a 1st class stamp
4. Value of the item
5. Security/privacy
6. Other
7. NONE
8. DON'T KNOW

SECTION: SATISFACTION & PROBLEMS
ASK ALL (RESPONSIBLE FOR POST)
QD1  SHOWCARD POST13 How satisfied are you with the following aspects of the Royal Mail’s delivery service on a scale of 1 to 5 where 5 means you are extremely satisfied and 1 means you are extremely dissatisfied? READ OUT EACH STATEMENT IN TURN. RANDOMISE ORDER. SINGLE CODE FOR EACH

1 2 3 4 5
extremely dissatisfied extremely satisfied Don't know

The time your mail is delivered each day

The reliability/consistency of the delivery time each day

The number of days your mail is delivered each week

The speed of delivery from posting to receiving

The value for money of sending mail
QD2 In the last 12 months have you experienced problems with Royal Mail’s service in terms of... (READ OUT ITEM)? RANDOMISE ORDER. ALLOW RESPONDENT TO SAY “YES” OR “NO” TO ITEM BEFORE MOVING TO NEXT ITEM

<table>
<thead>
<tr>
<th>Item</th>
<th>Yes</th>
<th>No</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lost mail</td>
<td>01</td>
<td>02</td>
<td>03</td>
</tr>
<tr>
<td>Damaged mail</td>
<td>01</td>
<td>02</td>
<td>03</td>
</tr>
<tr>
<td>Delayed mail</td>
<td>01</td>
<td>02</td>
<td>03</td>
</tr>
<tr>
<td>Misdelivered mail (read out: in other words mail that is incorrectly delivered to the respondents address.)</td>
<td>01</td>
<td>02</td>
<td>03</td>
</tr>
<tr>
<td>Other problems (please specify)</td>
<td>01</td>
<td>02</td>
<td>03</td>
</tr>
</tbody>
</table>

ASK IF HAD PROBLEMS. OTHERS GO TO QE1

QD3 Did you make a complaint to Royal Mail about its services?

1. Yes
2. No
3. Don’t know

SECTION: ATTITUDES AND OPINIONS

ASK ALL (RESPONSIBLE FOR POST)

QE1 SHOWCARD POST14 Which of the following do you regularly use to communicate? CODE ALL THAT APPLY

- Landline/Mobile phone voice calls
- Text messaging (SMS)
- Use Messenger service via a Blackberry/ Smartphone
- Sending/ receiving mail using postal services
- Using the internet or email via a computer/laptop/netbook/tablet computer
- Using the internet or email via a smartphone
- OTHER (WRITE IN)
- None of these (SINGLE CODE)
- Don’t know

QE2 SHOWCARD POST15 Which of these statements apply to you? CODE ALL THAT APPLY

1. I love to send and receive letters and cards
2. I prefer to send e-mails rather than letters whenever possible
3. I prefer to send letters or e-mails to companies rather than make a telephone call so that I have a written record.
4. It is worth sending a letter for important communications.
5. Nowadays the only things I post to friends and relatives are birthday or greeting cards rather than letters
6. I frequently use post even when I can use other methods
7. I only use post when there is no alternative
8. I would feel cut off from society if I can’t send/ don’t receive post
9. None of these
10. Don’t know
ASK ALL
QX1 Do you have any long standing physical or mental impairment, illness, or disability? By ‘long standing’ I mean anything that has troubled you over a period of at least 12 months or that it is likely to affect you over a period of at least 12 months

<table>
<thead>
<tr>
<th>Option</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>1</td>
</tr>
<tr>
<td>No</td>
<td>2</td>
</tr>
<tr>
<td>Refused</td>
<td></td>
</tr>
</tbody>
</table>

ASK ALL
QX2 Are you unable to leave your house without help, because you are ill or disabled?
INTERVIEWER IF NEEDED: By this I mean are you housebound?

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Don't Know</td>
</tr>
</tbody>
</table>