Ofcom Post User Needs survey research 2024 - Technical Report – prepared by BMG Research

This report outlines the methodology and technical details for the 2024 Post User Needs study conducted by BMG Research on behalf of Ofcom. This was a standalone piece of quantitative research among UK adults aged 16+ and small and medium enterprises (SMEs). The objectives of the survey were to:

- Provide an up-to-date overview of postal service users' needs, including both individuals and businesses.

- Understand the projected impacts on users of suggested changes to the universal postal service.

- Provide robust and objective evidence to inform decisions and debate about the future of the universal postal service.

1.1 Overview

1.1.1 Residential survey overview

3,145 adults aged 16+, across the United Kingdom were interviewed between September 23rd and November 3rd 2024. Two methods were employed for this survey: an online approach and a Computer-Assisted Self-Interviewing (CASI) approach. Both types of interview took an average of 18 minutes to complete. Each approach is detailed below.

- **Online:** Respondents were recruited via a blend of online panels to take the survey online via a web link. This approach achieved 69% of the target sample – 2,156 of the 3,145 completed interviews.

- **CASI:** Respondents were recruited on the doorstep by an interviewer, before being passed a tablet computer to record answers onto an interactive version of the survey. This approach, known as Computer-Aided Self-Interviewing (CASI), was selected over the more common Computer-Aided Personal Interviewing (CAPI) approach because it closely mirrors the self-completion experience of an online survey. Interviewers had the option to lead the interview if the respondent didn't feel comfortable or was unable to complete the survey themselves. This approach achieved 31% of the target sample – 989 of the 3,145 completed interviews.

Both approaches are detailed further in section 1.3 of this report.

Quotas were set by UK nation to ensure sufficient samples in Scotland, Wales, and Northern Ireland for sub-group analysis. At a UK-wide level, quotas were set to ensure a representative sample by age and gender, while within each nation, quotas were then applied so that each was representative by socio-economic group (SEG).

Urbanity quotas were also applied at a UK-wide level, separated into three categories: urban, rural[1] and deep rural.[2]

Finally, quotas were set to ensure a sufficient sample was collected amongst those who do not use the internet at home and those who lack confidence online. Since this group is not adequately represented online, this quota was largely allocated to the face-to-face sample.

During analysis, weighting was applied to the data to ensure the final sample was representative of the UK population by region and representative of each nation by age, gender, SEG, ethnicity and urbanity.

1.1.2 SME overview

897 SME businesses across the United Kingdom were interviewed between September 30th and November 4th 2024. Two methods were employed to build the SME sample: an online approach and a Computer Aided Telephone Interview (CATI) approach. Online interviews took an average of 16 minutes to complete, while CATI interviews took an average of 24 minutes. Three SMEs in the sample said that they did not send or receive any post, even when specifically prompted, and these were therefore not asked the majority of the questions in the survey. Each approach is detailed below.

- **Online:** Respondents were recruited to take the survey online via a web link. This approach achieved 66% of the target sample – 596 of the 897 interviews.

- **CATI:** Respondents were interviewed by telephone, with contacts obtained from database brokers using profile data on size, location, and industry. Those SMEs sampled through the CATI methodology were allowed the option to complete an online survey if requested, and 50 SMEs took part in this way. Overall, CATI sampling achieved 34% of the target sample – 301 of the 897 interviews.

As with the residential element, these two approaches are detailed further in section 1.3 of this report.

Quotas were set by nation to ensure sufficient samples in Scotland, Wales, Northern Ireland) and within each of four English regions. The minimum quota in each was set to ensure sufficient base for analysis at a regional level (London, South East/South West/East of England, West Midlands/East Midlands, Yorkshire & Humberside/North East/North West). Given their relative size, oversampling was imposed in the three devolved nations to ensure adequate sample sizes for analysis.

At a UK-wide level, quotas were set to ensure a representative sample by size of workforce and industry (using SIC code). Monitoring quotas were also applied with industry interlocking with workforce size and by urbanity to ensure the survey was achieving a suitable distribution of responses. Since SMEs with small numbers of employees represent a high proportion of the SME population, oversampling was

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[1] Exclusive to the deep rural category. Areas in the UK designated as rural but not "hamlet and isolated dwellings", "hamlet and isolated dwellings in a sparse setting", or "village in a sparse setting" by the UK government in 2020. See: https://www.gov.uk/government/collections/rural-urban-classification

[2] Exclusive to the rural category. The population living "hamlet and isolated dwellings", "hamlet and isolated dwellings in a sparse setting", or "village in a sparse setting" according to the UK government designation in 2020. See: https://www.gov.uk/government/collections/rural-urban-classification

applied to SMEs with larger workforces to ensure adequate sample sizes for analysis.

Respondents were screened before entering the survey to ensure that only those with responsibility for the organisation's post and who were able to answer questions about their organisation's needs from letter post services were interviewed.

During analysis, weighting was applied to the data to ensure the final sample was representative of UK businesses by nation, size as measured by the number of employees, and industry.

Further details of the sampling frame, research methodology, weighting procedures and reporting of both the residential and SME elements are outlined in the following pages.

1.2 Sample design

1.2.1 Residential Quotas

As mentioned in the previous section, the sample was designed to be representative of the UK population (with a boost in devolved nations).

Hard quotas were set to ensure both the online and face-to-face samples were representative at a UK-wide level by region, age (16-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75+), gender (male, female), and urban/rural (urban, rural, deep rural). Hard quotas were also placed on socio-economic grade (ABC1, C2DE) within each nation.

In addition to these representative quotas, a target was introduced for those with low internet connectivity to ensure sufficient sample sizes were achieved among those without access to the internet at home, and low confidence internet users– key groups that this research needed to be able to identify.

This proportion aligns approximately with the 5% of the UK population who don't have internet access at home, based on Ofcom Technology Tracker data for 2024.[3] Achieving this required dedicating a significant portion of CASI interviews to this group, as individuals with no internet access or low online confidence are far less likely to be reached through online methods. As a result of the majority of no and low confidence users being recruited face-to-face, targets on the methodology for age and urban/rural skew older and more rural.

20% tolerance on quotas were placed on region, age, gender and SEG. This helped avoid being too restrictive, ensuring most minimum targets were achieved while allowing for small deviations within the tolerance limits.

Quotas for fieldwork were set using the following sources based on the information that was available when fieldwork preparation was undertaken in late 2024:

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[3] Ofcom Tech Tracker 2024: https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/data/statistics/2024/technology-tracker/technology-tracker-2024-data-tables.pdf

- For region, age and gender, 2022 mid-year estimates from the ONS were used for all nations.[4]

- For socio-economic grade, 2021 Census data was used for England, Wales and Northern Ireland, while 2011 data was used for Scotland.[5,6]

- Urban/rural targets were set using 2020 mid-year estimates in England and Wales, 2022 output area classification was used in Scotland, and 2015 settlement classification was used in Northern Ireland. [7,8,9]

- The target for those with no internet connection at home was set to ensure a robust base size for analysis.

The below table shows the quotas set at a UK-wide level. Please note that because the sample size achieved in fieldwork was higher than the original target (3,145 achieved), many of the quota categories exceed their target.

Demographic	Online – Target set	Online - Achieved	F2F – Target set	F2F - Achieved	Total – Target set	Total – Achieved
Nation – England	1,350	1,407	600	638	1,950	2,045
Nation – Scotland	250	251	100	145	350	396
Nation – Wales	250	255	100	106	350	361
Nation – Northern Ireland	250	243	100	100	350	343
Gender – Male	1,018	980	436	468	1,454	1,448

[4] 2022 mid-year estimates:
https://www.ons.gov.uk/releases/populationestimatesfortheukenglandwalesscotlandandnorthernirelandmid2022

[5] SEG Census 2021:
https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/approximatedsocialgradeenglandandwales/census2021

[6] SEG Census 2011 Scotland: https://www.scotlandscensus.gov.uk/metadata/social-grade-approximated/

[7] Urban/Rural mid-year estimates 2020: https://www.gov.uk/government/statistics/rural-population-and-migration/rural-population-and-migration

[8] Scottish urban/rural 2022 classification: https://www.gov.scot/publications/scottish-government-urban-rural-classification-2022/

[9] Northern Irish urban/rural 2015 classification: https://www.daera-ni.gov.uk/articles/rural-statistics

Demographic	Online – Target set	Online - Achieved	F2F – Target set	F2F - Achieved	Total – Target set	Total – Achieved
Gender – Female	1,082	1,147	464	519	1,546	1,666
Age – 16-24	312	178	117	80	429	258
Age – 25-34	379	390	145	146	524	536
Age – 35-44	334	358	144	158	478	516
Age – 45-54	331	321	142	147	473	468
Age – 55-64	335	433	143	155	478	588
Age – 65-75	216	291	109	163	325	454
Age – 75+	193	185	100	140	293	325
SEG – ABC1	1,140	1,182	490	424	1,630	1,606
SEG – C2DE	960	950	410	550	1,370	1,500
Urban/Rural – Urban	1,700	1,785	620	715	2,320	2,500
Urban/Rural – Rural	370	263	210	206	580	469
Urban/Rural – Deep rural	30	108	70	68	100	176
Low connectivity – No connection at home	0	19	200	152	200	171
Low connectivity – Low confidence	80	163	120	110	200	273

1.2.2 Selecting the Residential CASI sample

The approach used a random locational quota design to ensure a representative sample from diverse geographic areas across the UK. In England, Wales and Scotland Lower Super Output Areas (LSOAs) were used as the basic building block for sampling. In Northern Ireland Data Zones were used. Each LSOA, a small

geographic unit, contains about 650 addresses in England, Wales, and Scotland. In Northern Ireland each Data Zone contains about 400 addresses.

These were then stratified by region, then within region by three factors; a 3-point urban/rural categorisation, Indices of Multiple Deprivation (IMD) quintiles, and BMG's low connectivity index classification. 90 sampling points were then selected, with a target of 10 interviews per point to be conducted (though many areas ended up exceeding their targets). Areas which ranked highly on BMG's low connectivity index classification were oversampled to boost the sample that was collected amongst this group.[10]

Quota control was applied per sampling point by three key variables (age, gender, socio-economic grade) to control the sample and ensure the units selected in a given region added up to be representative of each. The number of respondents who did not have access to the internet at home was also included as a monitoring quota.

In Scotland some SUs comprised of multiple OAs due to low populations in individual OAs. All OAs that were combined in this way were neighbouring.

A boosted sample in each of the devolved nations (Scotland, Wales, Northern Ireland), meant that a higher than representative proportion of the sampling units were placed in each of these regions. The remainder were split across England to be representative of GOR by population size. See the table below for the breakdown of sampling units (SU) per region.

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[10] This index rates areas based on the likelihood of having a higher proportion of residents without an internet connection. The score is determined by demographic factors historically associated with lower connectivity rates.

Nation or Region	Sampling units	Percentage of sampling units
North East	3	3%
North West	8	9%
Yorkshire and the Humber	6	7%
East Midlands	5	6%
West Midlands	6	7%
East of England	7	8%
London	9	10%
South East	10	11%
South West	6	7%
Wales	10	11%
Scotland	10	11%
Northern Ireland	10	11%

Because of the differing profile of each nation/region, sampling units were not created to be uniform in geographic size, but instead an SU is measured by the number of addresses it contains.

The SUs were selected with a probability proportionate to size. This was done by grouping the SUs into size bands, then those with a larger population were assigned a higher probability of being selected, those with a smaller population were made less likely to be selected. This ensures that all households within an SU had an equal chance of being selected, regardless of the size of the SU in which a household was situated. Each address selected within an SU was assigned an ID.

In addition to the main units, the same number of back-up units with similar demographic profiles were created so that interviewers had additional addresses to recruit from, should they fail to hit their quotas in their primary SU.

1.2.3 SME Quotas

The sample was designed to represent UK SMEs' profile. However, boosts were used for SMEs in the devolved nations and those with larger workforces to provide sufficient sample sizes.

Hard quotas were set to ensure both the online and telephone methods were representative by nation, workforce size (0 employees, 1-9, 10-49, 50-249), and sector (using SIC codes to define categories).

In addition to these hard quotas, monitoring quotas were used to ensure that the sample contained respondents across a 2-category urban/rural categorisation and an interlocking size by sector split.

Quotas for fieldwork were set using the UK Government's latest Business Population Estimates 2024.[11] Tolerance was factored into each category which helped avoid being too restrictive, ensuring most minimum targets were achieved while allowing for small deviations within the tolerance limits.

The below table shows the quotas set at a UK-wide level.

Demographic	Target set	Interviews achieved
Workforce – 0	200	191
Workforce – 1 to 9	400	346
Workforce – 10 to 49	150	195
Workforce – 50 -249	150	165
Nation – England	500	516
Nation – Wales	150	122
Nation – Scotland	150	149
Nation – Northern Ireland	100	110
SIC – ABDE (Agriculture / Mining / Energy)	28	32
SIC – C (manufacturing)	44	62
SIC – F (construction)	143	102
SIC – G (retail and wholesale)	89	116
SIC – H (transport and storage)	56	44

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[11] Business Population Estimates 2024: https://www.gov.uk/government/collections/business-population-estimates

Demographic	Target set	Interviews achieved
SIC – I (accommodation and food service)	37	34
SIC – J (information and communications)	52	54
SIC – K (financial and insurance)	13	17
SIC – L (real estate)	24	30
SIC – M (professional and scientific)	125	145
SIC – N (administrative services)	81	66
SIC – P (education)	50	54
SIC – Q (human health and social work)	56	47
SIC – R (arts and entertainment)	45	56
SIC – S (other services)	59	38
Urban/Rural – Urban	735	712
Urban/Rural - Rural	165	185

1.3 Fieldwork

Fieldwork for both the residential and SME programmes took place between September 23rd and November 4th 2024.

Before fieldwork began, a separate script was set up for each survey. While these contained many overlapping questions to allow comparison between the two surveys, the difference between the groups and the way that they use the post required many unique questions. Once both scripts had been finalised a primary online script was produced, with secondary versions for a CASI or CATI approach also developed.

Further details of the process for the main methodologies are explained below.

1.3.1 Online panel interviewing – used on both Residential and SME

The majority of the fieldwork on both the residential and SME programmes was completed using an online panel methodology.

Respondents were recruited through a selection of approved panel partners through a process called panel blending. This spreads fieldwork between panels to allow for faster data collection, better coverage amongst harder-to-reach groups (e.g. minority ethnic groups) and mitigated against any bias that might be introduced by how a panel recruits respondents. Quotas were split evenly across each panel.

After being recruited, respondents were directed to a survey link hosted on BMG's internal Forsta Survey software. Respondent management was handled by the panel providers.

For SME online interviewing, specialist business panels were partnered with for recruitment.

Respondents recruited through this method accounted for 2,156 of the 3,145 (69%) interviews on the residential element and 546 of the 897 (61%) interviews on the SME.

Data from online panel respondents went through an extensive quality control process. This included postcode verification, speeder and attention checks, IP verification, and verbatim review.

1.3.2 CASI interviewing – used on Residential only

Interviewers were assigned to each SU, and within this unit they were asked to recruit interviews which reflected the SU-level quotas based on age, gender and SEG.

Interviewers were instructed to recruit respondents in person on the doorstep. Having recruited the respondent, the interviewer would ask them initial screening questions and use a tablet device to enter respondents' answers into the script. Having completed this the interviewers were then prompted to hand over their tablet to the respondent for them to complete the majority of the survey directly. Interviewers had the option to lead the interview if the respondent didn't feel comfortable or was unable to complete the survey themselves.

Combining online and CASI approaches helped ensure inclusivity, allowing all segments of the UK population to participate, including those without internet access at home.

This method was selected over a more traditional CAPI method, whereby interviewers input all the survey responses on behalf of the respondent, because it more closely replicates the experience of an online respondent and therefore considerably reduces survey mode effects.[12]

Interviewers remained with respondents to help with more complex questions or difficulty with the technology.

Respondents recruited through this method accounted for 989 of the 3,145 (31%) interviews of the residential sample.

1.3.3 CATI interviewing – used on SME only

Half of the SME sample was to be recruited via telephone (CATI) approach using a business database. This approach allows us to reach a diverse sample across

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[12] A mode effect in a survey refers to the influence that the method of data collection (e.g., online, telephone, face-to-face) has on the responses provided by participants.

locations and industries and include businesses who may not be online regularly, or at least be members of business panels.

Most respondents recruited through this method would be expected to complete with an interviewer over the phone, however, to maximise the response rate, respondents were also offered the option of a follow up email with a link to complete the survey online. 50 respondents who were originally recruited on the telephone chose to participate this way.

Interviewing was conducted during weekday working hours, with each contact number being called a maximum of eight times before being abandoned.

Initially the SME element was designed to be evenly divided between CATI and online panel elements. However, during the course of fieldwork adjustments were made as a result of low response rates on the CATI element, to achieve a 60:40 split between panel and CATI methodologies.

Respondents recruited through this method accounted for 351 of the 879 (39%) interviews of the SME sample (including the 50 who chose to complete via email link).

1.3.4 Respondent incentivisation

CASI respondents were offered a £5 high street shopping voucher for completing the survey. Telephone (CATI) respondents were not incentivised.

BMG's online panel partners handled participant incentives for both residential and SME surveys, typically offering points, vouchers, or cash-out options, depending on the panel.

1.3.5 Welsh language translation

While doorstep interviewers who speak Welsh were not specifically recruited as part of this project, all interviewers operating in Wales carried a Welsh-translated introduction letter which could be shown to respondents if necessary.

This letter had details about how to request an interview in Welsh, by either emailing the designated BMG email address or giving their details to the interviewer on the doorstep. This allowed any Welsh speakers to:

- Request an appointment for a Welsh-speaking telephone interviewer to conduct the survey with them over the phone.

- Request an online version of the survey translated into Welsh.

No requests to be interviewed in Welsh were received for this project.

1.4 Weighting

1.4.1 Residential weighting

The survey data was weighted to ensure it is representative of the UK population aged 16+. Data from both online and CASI methodologies was weighted together under one process.

RIM weighting was applied to region, age/gender, SEG, ethnicity, and urban/rural classification. When these variables were also included in the quotas, the same data sources were used to set weighting targets.

For ethnicity, weighting was defined for England, Wales, and Northern Ireland using Census 2021 information.[13] In Scotland, it was defined using 2022 mid-year estimates.[14]

A full unweighted and weighted breakdown of the final sample is provided below.

The percentages described below as '% Weighted' are the targets used to weight the data. The '% Unweighted' column shows the actual percentage of interviews achieved in the fieldwork.

Demographic	Interviews achieved - unweighted	Weighted sample
Gender – Male	46%	48%
Gender – Female	53%	51%
Age – 16-24	8%	13%
Age – 25-34	17%	16%
Age – 35-44	16%	16%
Age – 45-54	15%	16%
Age – 55-64	19%	16%
Age – 65-74	14%	12%
Age – 75+	10%	11%
SEG – ABC1	51%	55%

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[13] Ethnicity Census 2021:
https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/ethnicity/bulletins/ethnicgroup englandandwales/census2021
[14] Scottish Ethnicity mid-year estimates 2022: https://www.scotlandscensus.gov.uk/2022-results/scotland-s-census-2022-ethnic-group-national-identity-language-and-religion/

Demographic	Interviews achieved - unweighted	Weighted sample
SEG – C2DE	48%	44%
Ethnicity – White	87%	82%
Ethnicity – Minority	12%	18%
Urban/Rural – Urban	79%	82%
Urban/Rural – Rural	15%	16%
Urban/Rural – Deep rural	6%	2%
Region – London	10%	13%
Region – South East	10%	14%
Region – South West	9%	9%
Region – East of England	6%	9%
Region – West Midlands	7%	9%
Region – East Midlands	6%	7%
Region – Yorkshire & Humber	5%	8%
Region – North East	3%	4%
Region – North West	9%	11%
Region – Scotland	13%	9%
Region – Wales	11%	4%
Region – Northern Ireland	11%	2%

As outlined earlier, to ensure an adequate sample size for sub-group analysis in each of the devolved nations, respondents in these nations were purposely oversampled. However, weighting adjusts the total sample to ensure that the proportion of respondents in each nation is representative of the UK as a whole.

Overall weighting efficiency[15] for this dataset was 76%. Purposeful oversampling in the devolved nations and in areas which have lower connectivity have had a negative impact on this efficiency, but generally around 80% is considered a good weighting efficiency for a survey of the general public.

1.4.2 SME weighting

The survey data used for this element was weighted to ensure the data is representative of UK SMEs. Data from both online and CATI methodologies was weighted together under one process.

RIM weighting was applied to nation, workforce size, and grouped industry. Weighting targets were defined using the same source as the quotas – the UK Government's Business Population Estimates 2024.

A full unweighted and weighted breakdown of the final sample can be seen in the table below.

The percentages described below as '% Weighted' are the targets used to weight the data. The '% Unweighted' column shows the actual percentage of interviews achieved in the fieldwork.

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[15] Weighting efficiency refers to a measure of how effective the applied weights are in retaining the original sample's statistical precision after accounting for adjustments made when aligning the sample with known population distributions. The higher the weighting efficiency percentage, the less the sample has been realigned to known distributions.

Demographic	Interviews achieved - unweighted	Weighted sample
Workforce – 0 employees	21%	74%
Workforce – 1 to 9	39%	21%
Workforce – 10 to 49	22%	4%
Workforce – 50 to 249	18%	1%
Sector – Primary, manufacturing, construction (ABCDEF)	22%	24%
Sector – Retail, distribution, accommodation and food services (GHI)	22%	20%
Sector – Business services (JKLMN)	35%	33%
Sector – Other services (PQRS)	22%	23%
Nation – England	58%	88%
Nation – Wales	14%	4%
Nation – Scotland	17%	5%
Nation – Northern Ireland	12%	2%

As outlined earlier, respondents in each of the devolved nations and SMEs with larger workforces were purposely oversampled to ensure an adequate sample size for sub-group analysis. However, weighting ensures that the final sample is not skewed as the proportion of those in each region and workforce size bracket is adjusted to be representative of UK SMEs as a whole.

The overall weighting efficiency for this dataset was 26%, which aligns with expectations due to the extent of oversampling conducted.

1.5 Reporting

Throughout the published data tables for this programme, significant differences are signified between sub-groups and the total result.

Differences from the total are signified by the highlighting of the percentage figure either green for significantly higher than the total or red for significantly lower than the total. Differences from other groups within each crossbreak set (e.g. region) are signified by letters below the percentage figure – the letter applied to each column appears below the crossbreak name.

Differences indicated as significant are considered to be significant at the 95% confidence level, meaning that there is only a 5% possibility that the difference occurred by chance rather than it being a real difference.

The data used in the published reports for this research are rounded up or down to the nearest whole percentage. It is for this reason that, on occasion, tables or charts may add up to slightly more or less than 100%. Results that do differ in this way should not have a sum-total deviance that is larger than around 1% to 2%.

In the tables and charts contained in outputs for this research, a * symbol denotes a proportion that is less than 0.5%, but greater than zero.

For the residential element, the nature of the sample construction, quotas, and weighting used when reporting mean that it is necessary to state that the data represents the percentage of adults rather than the percentage of households.

For the SME element, similar factors mean that the data represents the percentage share by the number of SME businesses, rather than the share of the workforce within SMEs.

1.5.1 MaxDiff approach

To better understand how respondents view the relative importance of different elements of their postal service a statistical approach known as a MaxDiff was used to analyse the data.[16]

The MaxDiff approach offers greater statistical confidence than simply asking respondents to rank each element. For the MaxDiff exercise each respondent was shown a selection of three attributes at a time and asked to indicate which of these was most and least important to them. This exercise was then repeated several times with the eight attributes to be tested shown in various combinations.

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[16] This was question B3 in both the residential and SME questionnaires. The question asked "Thinking about the postal service and the sending and receiving of letters as a whole, we want to understand what you think is important to your organisation. To help us understand this, you will shortly be shown 8 short questions, each showing a set of 3 options. For each set, please select the one you feel is the most important and the one you feel is the least important to your organisation."

The attributes tested were run through a statistical model which placed them into various combinations, but which ensured each attribute was tested evenly against each other.

This method effectively distinguishes high and low priorities, even with numerous attributes. While it doesn't directly use 'preference' and 'needs' language, score thresholds can be used to help identify primary, secondary, and lower-order considerations.

MaxDiff analysis was not conducted with SMEs who completed the survey by telephone due to the time required to read out the questions. Instead, the SME MaxDiff analysis used data from the 546 SMEs who completed online.

1.6 Open response coding

In both the residential and SME surveys, there were some open text response questions, allowing respondents to write in an answer (or select a 'Don't know' code or, in the case of one question, another code to indicate 'No impact').

These questions were included to provide understanding of exactly how respondents believed they would be impacted by changes to the postal service. For full wording of these questions see question B2, C2, and C4a in both the residential and SME questionnaire.

Where the number of respondents answering each question was big enough, a code frame was created and applied. The code frames were finalised once data and verbatims had been looked at and designed to capture responses from multiple angles. Across each question responses were allocated:

1. An impact code to indicate the level of impact that can be seen or implied from the response, including a code to flag where no level of impact can be determined.

2. A code to describe the type of letter post being discussed in the response – there could be multiple letter types in a single response, or if no letter types were clearly mentioned, a code was created to indicate this.

3. A code to flag any specific actions or concerns mentioned in the response, where possible.

1.6.1 Caveats on Coding

When looking at the coded data the full context must be considered in terms of the base and previous questions. In essence, the open questions asked for more specific information about an answer already given *e.g. Why do you say this?*

While the codes for each question indicate an impact level, the questions (C2 and C4a) themselves were asked to those who already indicated some level of harm or inconvenience as a response to the previous question– so the coded data should be interpreted taking responses to previous questions into account.

The answer coding and categorisation was conducted by BMG, an independent market research agency. However, it should also be noted that there is always some judgement involved when coding, and some answers given were ambiguous.

To account for the caveats of coded data and the limited analysis that can be done with these, we have not shown significance testing in these coded data tables.

1.7 Methodological notes

1.7.1 Residential modal selection

The methodological choices on the residential survey were designed to maximise response rates and representativeness by providing different options for completion to suit different respondent preferences. The mixed method approach also aimed to mitigate modal tendencies and biases associated with different survey completion methods and to provide a complementary mix.

Recruitment through online panels was selected as it provides a fast and cost-effective method of delivering the robust sample sizes required for this piece of research, and it therefore made up the bulk of the sample. However, online panels have poorer coverage of those who are less active or not at all active online, as well as those in deep rural and other hard-to-reach groups – all of which were key for this research.

Therefore, interviewing via the offline CASI methodology was also required to ensure sample requirements were met. CASI was selected over the more common CAPI because this would reduce the difference in survey experience for the respondent between methods. Both are primarily self-administered, with respondents using a device to enter responses, and both enabled the use of the MaxDiff analytical technique used on this survey.

However, despite the design being as complementary as possible, some modal impacts still had an effect on data collection and analysis.

The survey data may be subject to some modal tendencies, which explain some difference in responses. Some examples of this are below:

- It is possible that respondents who completed the survey with an interviewer present (via the CASI method) may have been more positive in their responses, while panel respondents might have been less moderate and have exaggerated the strength of their views.

- The face-to-face element of the residential survey was included to reach those with no connection to the internet at home, deep rural and hard-to-reach users. However, this means that the face-to-face sample tended to skew older, more rural and were more disconnected, than the panel sample.

1.7.1 SME modal selection

For the SME element the methodological choices were primarily selected to provide respondents with the flexibility to respond how they wished. Business respondents are generally time poor and allowing for completion options through telephone or online greatly improves recruitment rates.

While respondents representing SMEs of a range of workforce sizes were interviewed across both methodologies, panels are more effective for reaching smaller businesses that may not have a designated business telephone number, while larger businesses are easier to reach by phone due to the presence of switchboard operators or similar individuals who can help the interviewer to identify and reach the appropriate person within the business.

Modal effects due to the presence of an interviewer on the telephone element showed similar impacts to the residential survey, where responses tended to be more positive and moderate than they were online.

1.7.3 General methodological limitations

Responses are based on respondents' recall of their use of the postal letter service and our survey prompted respondents on a number of different letter types that they may have received or sent in the past. Letters that a respondent regards as important are likely to be more memorable to them and therefore, it is likely there is an overclaim on the frequency of sending or receiving certain types of letter.

As such, the collected data should not be treated as a precise record of the numbers of letters sent and received.

Necessarily, this survey focused on people's perceived and predicted impacts of a hypothetical scenario. The survey drew specific attention to proposed service changes and asked respondents to consider the potential impact on several categories of letter that they may receive and send. As such, the degree of prompting within the survey means that respondents may have overestimated the potential impact or have been considering 'worst case' hypothetical scenarios in their responses.

The survey also did not test the level of understanding of the USO or the current expected or received levels of service that respondents had. Accordingly, we cannot confirm that their perceived impact of the changes is based on a fully rounded knowledge of the difference between the current and proposed service.

While throughout the survey respondents were reminded to think about specific Royal Mail services (Second Class and Standard Business Letters), and of letters rather than parcels, respondents may have had other postal services in mind when answering questions. In addition, respondents may not have considered the availability of alternative services, such as First Class letter post or faster business post when assessing and stating the impact of the proposed changes.

There was a routing error in the first few days of fieldwork for the residential survey, meaning that approximately 10 respondents were not routed to where they should have been according to their answer to a previous question. Therefore for some C4 tables, some responses appear in a 'Not Asked' row, and in the final combined table the base label illustrates that some respondents have been excluded from the base.

Appendix 1. Guide to statistical reliability

The variation between the sample results and the 'true' values (the findings that would have been obtained if everyone in the population had been interviewed) can be predicted from the sample sizes on which the results are based, and on the number of times that a particular answer is given.

The confidence with which we can make this prediction is usually chosen to be 95%, that is, the chances are 95 in 100 that the 'true' values will fall within a specified range. However, as the sample is weighted, we need to use the effective sample size rather than actual sample size to judge the accuracy of results.

The following table compares effective sample size and unweighted sample for some of the main analysis groups from the residential element of this research.

Demographic	Unweighted base	Effective sample size
Gender – Male	1,448	1,088
Gender – Female	1,666	1,281
Age – 16-34	794	571
Age – 35-54	984	721
Age – 55+	1,367	1,180
SEG – ABC1	1,606	1,202
SEG – C2DE	1,500	1,179
Nation – England	2,045	1,836
Nation – Scotland	396	362
Nation – Wales	361	270
Nation – Northern Ireland	343	253
Urban/Rural – Urban	2,500	1,938
Urban/Rural – Rural	469	367
Urban/Rural – Deep rural	176	126

The table below illustrates the required ranges for different sample sizes and percentage results at the 95% confidence interval.

Effective sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total – 2,387	2.4%	3.2%	3.7%	3.9%	4.0%
Female – 1,281	3.3%	4.4%	5.0%	5.4%	5.5%
Rural - 367	6.1%	8.2%	9.4%	10.0%	10.2%
Wales – 270	7.2%	9.5%	10.9%	11.7%	11.9%

For example, if 30% or 70% of a sample of 2,387 give a particular answer, the chances are 95 in 100 that the 'true' value will fall within the range of +/- 3.7% percentage points from the sample results.

When results are compared between separate groups within a sample, different results may be obtained. The difference may be 'real', or it may occur by chance (because not everyone has been interviewed).

To test if the difference is a real one – i.e. if it is 'statistically significant' – we again must know the size of the samples, the percentages giving a certain answer and the degree of confidence chosen. If we assume '95% confidence interval', the difference between two sample results must be greater than the values given in the table below to be significant.

Effective sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Male – 1088 vs. Female – 1281	4.8%	6.5%	7.4%	7.9%	8.1%
England – 1,836 vs. Scotland – 362	6.8%	9.0%	10.3%	11.0%	11.3%

Appendix 2. Column break definitions

A2.1 Residential definitions

The table below details the crossbreaks used in the residential data tables for this survey. Simple demographic cross breaks (e.g. age) are not shown.

Group	Column break	Definition
Home internet use	Use	S01=1
	No not use	S01=2 OR 3
Internet Access	Internet user	S01=1 OR S02=1
	Confident user	S03=1-2
	Not confident user	S03=3-97
	Have but do not use	(S01=2 OR S02=2) AND (S01≠1 OR S02≠1)
	No connection	S01=3 AND S02=3
	NET: Do not use	(S01= 2 OR 3) AND (S02=2 OR 3)
Working Status	In work	Z01=1 OR 2 OR 3
	Not in work	Z01=4 OR 5 OR 6 OR 7 OR 8 OR 9 OR 10 OR 11 OR 12
	Retired	Z01=10
Receive Benefits	Yes	Z08=Any 1-9,95
	No	Z08=96
Financial Outlook	Doing well	Z09=1
	Getting by	Z09=2
	Struggling	Z09=3
Financial Vulnerability	Most	(Z03=1) OR (((Z03=2 OR 3) AND ((Z05=3+) AND (Z06=1+)) OR ((Z05=4+) AND (Z06=0))) OR ((Z03=4) AND (Z05=5+)) OR ((Z03=5) AND (Z05=5+))
	Potentially	(((Z03=2 OR 3) AND ((Z05=1 OR 2 OR 3) AND (Z06=0 OR 1))) OR (((Z03=4) AND ((Z05=2 OR 3 OR 4) AND (Z06=0 OR 1 OR 2 OR 3)) OR ((Z05=5) AND (Z06=3))) OR (((Z03=5) AND ((Z05=3 OR 4) AND (Z06=0 OR 1 OR 2 OR 3)) OR ((Z05=5) AND (Z06=0)))
	Least	(((Z03=4 AND ((Z05=1) AND (Z06=0))) OR ((Z03=5) AND (Z05=1 OR 2) AND (Z06=0 OR 1)) OR (Z03=6 OR 7)
Receive letters	Ever	A1=2-6,96 OR A2=2
	Daily / A few times per week	A1=5 OR 6

	Weekly	A1=4
	Less than weekly	A1=2 OR 3
Send letters	Ever	A5=2-6,96 OR A5A=1
	Daily / A few times per week	A5=5 OR 6
	Weekly	A5=4
	Less than weekly	A5=2 OR 3
Types of letters received ever	Birthday/anniversary/occasion cards	A4/1=2-6,96
	Invitations, postcards, and personal letters	A4/2=2-6,96
	Hospital / Doctor's appointment letters from the NHS or other healthcare provider	A4/3=2-6,96
	Medical test results	A4/4=2-6,96
	Forms or paperwork related to receiving benefits	A4/5=2-6,96
	Any other letter post from public bodies	A4/6=2-6,96
	Bills, invoices, bank or credit card statements	A4/7=2-6,96
	Newsletters, leaflets and promotions from organisations you have a relationship with, catalogues and brochures	A4/8=2-6,96
	Addressed direct mail from organisations you do not have a relationship with	A4/9=2-6,96
	Magazines you subscribe to	A4/10=2-6,96
	Small items received using large letter post	A4/11=2-6,96
	NET: Any personal/social post	Any of A4/1, A4/2 = 2-6, 96
	NET: Any health-related post	Any of A4/3, A4/4 = 2-6, 96
Types of letters received in the last month	Birthday/anniversary/occasion cards	A4/1=3-6
	Invitations, postcards, and personal letters	A4/2=3-6
	Hospital / Doctor's appointment letters from the NHS or other healthcare provider	A4/3=3-6
	Medical test results	A4/4=3-6
	Forms or paperwork related to receiving benefits	A4/5=3-6
	Any other letter post from public bodies	A4/6=3-6
	Bills, invoices, bank or credit card statements	A4/7=3-6

	Newsletters, leaflets and promotions from organisations you have a relationship with, catalogues and brochures	A4/8=3-6
	Addressed direct mail from organisations you do not have a relationship with	A4/9=3-6
	Magazines you subscribe to	A4/10=3-6
	Small items received using large letter post	A4/11=3-6
	NET: Any personal/social post	A4/1 OR A4/2 = 3-6
	NET: Any health-related post	A4/3 OR A4/4 = 3-6
Types of letters sent ever	Birthday/anniversary/occasion cards	A6/1=2-6,96
	Invitations, postcards and personal letters	A6/2=2-6,96
	Letters / forms to the NHS or other healthcare providers	A6/3=2-6,96
	Samples/ health tests to the NHS or other healthcare providers	A6/4=2-6,96
	Forms or paperwork related to receiving benefits	A6/5=2-6,96
	Any other letters / forms to public bodies	A6/6=2-6,96
	Small items sent using large letter post	A6/7=2-6,96
	Bill payments	A6/8=2-6,96
	Post sent to businesses	A6/9=2-6,96
	Items requiring a signature on delivery	A6/10=2-6,96
	NET: Any personal/social post	Any of A6/1, A6/2 = 2-6, 96
	NET: Any health-related post	Any of A6/3, A6/4 = 2-6, 96
Types of letters sent in the last month	Birthday/anniversary/occasion cards	A6/1=3-6
	Invitations, postcards, and personal letters	A6/2=3-6
	Hospital / Doctor's appointment letters from the NHS or other healthcare provider	A6/3=3-6
	Medical test results	A6/4=3-6
	Forms or paperwork related to receiving benefits	A6/5=3-6
	Any other letter post from public bodies	A6/6=3-6

	Bills, invoices, bank or credit card statements	A6/7=3-6
	Newsletters, leaflets and promotions from organisations you have a relationship with, catalogues and brochures	A6/8=3-6
	Addressed direct mail from organisations you do not have a relationship with	A6/9=3-6
	Magazines you subscribe to	A6/10=3-6
	Small items received using large letter post	A6/11=3-6
	NET: Any personal/social post	A6/1 OR A6/2 = 3-6
	NET: Any health-related post	A6/3 OR A6/4 = 3-6
Occasion cards received	Never	A4/1=1
	1 or fewer in the last month	A4/1=2 OR 3
	2-5 in the last month	A4/1=4
	6+ in the last month	A4/1=5-6
	Do receive but don't know how often	A4/1=96
Occasion cards sent	Never	A6/1=1
	1 or fewer in the last month	A6/1=2 OR 3
	2-5 in the last month	A6/1=4
	6+ in the last month	A6/1=5-6
	Do send but don't know how often	A6/1=96
Official post (hospital/NHS/medical letters, benefits letters, public bodies) received	Never	A4/3 AND 4 AND 5 AND 6=1
	1 or fewer in the last month	(A4/3 OR 4 OR 5 OR 6=2 OR 3) AND (A4/3 AND 4 AND 5 AND 6≠4-6)
	2-5 in the last month	(A4/3 OR 4 OR 5 OR 6=4) AND (A4/3 AND 4 AND 5 AND 6≠5-6)
	6+ in the last month	(A4/3 OR 4 OR 5 OR 6=5-6)
	Do receive but don't know how often	A4/3 OR 4 OR 5 OR 6=96
Official post (hospital/NHS/medical letters, benefits letters, public bodies) sent	Never	A6/3 AND 4 AND 5 AND 6=1
	1 or fewer in the last month	(A6/3 OR 4 OR 5 OR 6=2 OR 3) AND (A6/3 AND 4 AND 5 AND 6≠4-6)
	2-5 in the last month	(A6/3 OR 4 OR 5 OR 6=4) AND (A6/3 AND 4 AND 5 AND 6≠5-6)
	6+ in the last month	(A6/3 OR 4 OR 5 OR 6=5-6)
	Do send but don't know how often	A6/3 OR 4 OR 5 OR 6=96
Class of letters sent	Use 1st class ever	A7/1-10=1 OR 2

	Use 2nd class ever	A7/1-10=3 OR 4
	Never use 1st class	A7/1-10≠1 OR 2
	Never use second class	A7/1-10≠3 OR 4
	Use special delivery/tracked ever	A7/1-10=5 OR 6
Awareness of changes before today	Aware	C0=1
	Not aware	C0=2
Online marketplace sellers	Yes - Main source of income	A11=1
	Yes - Not main source	A11=2 OR 97
	No	A10=2
Impact of changes - Substantial harm/difficulties	Sending or Receiving any letter type (changes generally)	Any C1/1-11=4 OR C4/1-11=4
	Sending any letter type (changes generally)	Any C4/1-11=4
	Receiving any letter type (changes generally)	Any C1/1-11=4
	Not receiving 2nd class post/standard business post on Saturday	C3/1=4
	Not receiving magazines on Saturday	C3/2=4
	Receiving standard business post one day later	C3/3=4
Extent of impact, taking everything into account	A significant impact only	C7/1-3=4 AND C7/1-3≠5
	Any very significant impact	C7/1-3=5
Internet Connection	No internet connection at home	S01 =3
	Do not have any internet connection	S01=3 AND S02=3
	Do not personally use internet	S01= 2 OR 3 AND S02 = 2 OR 3
Internet usage	Have access to the internet at home	S01 = 1 OR 2
	Use internet (any location)	S01 = 1 OR S02 = 1
	Use internet outside of home only	S01 = 2 OR 3 AND S02=1
Confidence in using internet	Confident user	S03=1-2
	Not confident user	S03=4-5
	Not confident user inc. neither	S03=3-5

A2.2 SME definitions

The table below details the crossbreaks used in the residential data tables for this survey. Simple firmographic cross breaks (e.g. size) are not shown.

Group	Column break	Definition
Grouped SIC	Primary, manufacturing, construction (ABCDEF)	S2CATIB=1/2/3/4/5/6 or S2AW=1/2/3/4/5/6
	Retail, distribution, accommodation and food services (GHI)	S2CATIB=7/8/9 or S2AW=7/8/9
	Business services (JKLN)	S2CATIB=10/11/12/13 or S2AW=10/11/12/13
	Other services (PQRS)	S2CATIB=14/15/16/17/18/19/20 or S2AW=14/15/16/17/18/19/20
Receive letters	Ever	S5=2-6 or 96 or S5ACATI=1 or S5ACAWI=1
	Daily	S5=6
	Weekly/few times a week	S5=4-5
	Never	S5ACATI=2 or S5ACAWI=2
Send letters	Ever	S6=2-7 or 96 or S6ACATI=1 or S6ACAWI=1
	Daily	S6=6-7
	Weekly/few times a week	S6=4-5
	Never	S6ACATI=2 or S5ACAWI=2
Postage spend (per annum) nets	£0-100	S7=1/2/3/4/5
	£101-500	S7=6/7/8/9
	£501-£2000+	S7=10/11/12
Importance of post to organisation	Not core	s11=1
	Very important	s11=2
	Core to organisation	s11=3
	Very important/ Core to organisation	s11=2,3
Types of letter received	Forms or letters from customers, client, subscribers	A2/1= 2-6,96
	Any letter post from public bodies (e.g. your local council, HMRC, DBT)	A2/2=2-6, 96
	Bills, invoices, bank statements or credit card statements	A2/3 = 2-6/96
	Trade magazines, Newsletters, leaflets and promotions from organisations you have a relationship with	A2/4= 2-6/96

	Addressed direct mail from organisations you have a relationship with	A2/5=2-6/96
	Small items received using large letter post	A2/6-2-6,96
Types of letter sent	Forms or letters to customers, clients or subscribers	A3/1= 2-6,96
	Any letter post to public bodies (e.g. your local council, HMRC, DBT)	A3/2=2-6, 96
	Bills/invoices to customers/clients	A3/3 = 2-6/96
	Marketing material to your customers/clients.	A3/4= 2-6/96
	Addressed direct mail to people or organisations you do not have a relationship with	A3/5=2-6/96
	Small items sent using large letter post	A3/6-2-6,96
Class of letters sent	Use 1st class ever	A4/1-6=1-2
	Use 2nd class ever	A4/1-6=3-4
	Use special delivery/tracked ever	A4/1-6=5-6
Ever sent small items	Yes	A6=1
	No	A6=2
Awareness of changes	Yes	C0=1
	No	C0=2
	Don't know	C0=97
Impact of changes - Substantial harm/difficul ties	Any letter type received	C1/1-6= 4
	Any letter type sent	C4/1-6= 4
Extent of impact, taking everything into account	No impact	C7=1-2
	Any negative impact	C7=3-5
	Any very significant negative impact	C7=5

Appendix 3. Questionnaires

A3.1 Residential questionnaire

Survey introduction

ONLINE INTRO

We are conducting a survey on behalf of Ofcom about your use of postal letter services. Ofcom is the UK regulator for communications services used in the UK, including post, mobile phone, broadband, landline and pay-TV services. This survey is specifically about use of the postal service for sending and receiving letters and large letters.

The results of this study will help Ofcom better understand your current postal needs for letters, and how these might change in the future. All user views are important, even if you hardly ever send or receive letter post.

The survey will take around **20 minutes to complete.**

Just to confirm, your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is here http://www.bmgresearch.co.uk/privacy

Click **NEXT** to begin the survey

By clicking the **NEXT** button, you agree to participate in the survey.

CAPI INTRO

Good morning/ afternoon. We are conducting a survey on behalf of Ofcom about your use of postal letter services. Ofcom is the UK regulator for communications services used in the UK, including post, mobile phone, broadband, landline and pay-tv services. This survey is specifically about use of the postal service for sending and receiving letters and large letters.

The results of this study will help Ofcom better understand your current postal needs for letters, and how these might change in the future. All user views are important, even if you hardly ever send or receive letter post.

The survey will take around **20 minutes to complete.**

Just to confirm, your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times. Please note consent is audio recorded.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is on our website.

I can give you the website address (https://www.bmgresearch.co.uk/privacy).

[IN WALES ONLY] Participation in Welsh is available on request, please email [email address removed]

Ensure calling card provided if request more detail about BMG including about privacy notice

INTERVIEWER: Confirm respondent happy to proceed with the survey

✓ Informed consent provided **[TICK BOX, DO NOT ALLOW TO PROCEED WITHOUT TICKED]**

Secondary Introduction

The survey is about your use of **postal letter services** that you use for sending and receiving letters within the UK. By letters, we mean standard letters such as bills, greetings cards etc.

Postal letter services also include larger letters that may contain small items up to 750g in weight and that will fit into an envelope or slim packet, such as craft materials, make-up or small DIY items such as nuts and bolts. They might also include A4 sized magazines, catalogues and books that are up to about 1 inch/ 2.5 cm thick etc.

Parcels are not included in this piece of research.

Screening & Profiling (Section S)

Base: All CAWI respondents

PROVIDEPOSTCODE. This survey **requires** respondents to give their full postcode. Are you happy to provide this?

This information will only be used for statistical purposes to analyse the results by specific areas, such as Local Authority, Constituency and Government areas. Asking for your postcode helps us to report more accurate information, and you can include a postcode for either a permanent or temporary

address. All answers will be treated entirely anonymously, and postcode information will not be used for any other purpose.

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No	**SCREENOUT**	

Base: All CAWI respondents

OPEN RESPONSE, POSTCODE FORMATTING & VALIDATION APPLIED

POSTCODE. Could you please provide your full UK postcode?

Please ensure to **include a space** where applicable, e.g. AB1 2CD

Please answer in the box below

[_____]

INTRO TEXT

Firstly, some questions about you …

Base: All respondents

SINGLE RESPONSE

S01. Do you or does anyone in your household have access to the internet at home? This could be using a desktop computer, mobile phone, laptop, tablet (like an iPad), computer, games console or Smart TV.

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes – have internet access and use at home		
2	Yes – have internet access but don't use at home		
3	No – do not have internet access at home		
97	Don't know		

Base: All respondents

SINGLE RESPONSE

S02. Do you ever access the internet outside your home? Again, this could be using a desktop computer, mobile phone, laptop, tablet (like an iPad), computer, games console or Smart TV.

It might be in places such as work or school, a library, a café, while travelling, or at someone else's house and might be using WiFi or 4G or 5G.

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes – have internet access and use outside of my home		
2	I have internet access outside of the home, but don't use outside of my home		
3	No – do not have internet access outside of my home		
97	Don't know		

Base: All respondents that go online at home or elsewhere (S01=1 AND/OR S02=1)

SINGLE RESPONSE

S03. Overall, how confident are you in using the internet?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Very confident		
2	Fairly confident		
3	Neither confident nor unconfident		
4	Not very confident		
5	Not at all confident		
97	Don't know	**FIX**	

Base: All respondents

SINGLE RESPONSE

S04. Which of the following are you?

Please select one only

Code	Answer list	Scripting notes	Routing
1	A man		
2	A woman		
3	Non-binary		
95	Prefer to use another term	**ADD OPEN TEXT BOX**	
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

S05. Which of the following age bands are you in?

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	Under 16	**SCREENOUT**	
2	16 to 17		
3	18 to 24		
4	25 to 34		
5	35 to 44		
6	45 to 54		
7	55 to 64		
8	65 to 74		
9	75+		

Base: All respondents

SINGLE RESPONSE

S06. Which of the following best describes the occupation of the main income earner in your household?

If the main income earner is retired and has an occupational pension, or if they are not in employment and have been out of work for less than 6 months, please answer for their most recent occupation.

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	**Semi or unskilled manual work** (e.g. Manual workers, all apprentices to be skilled trades, caretaker, Park keeper, non-HGV driver, shop assistant)	**SEG D**	
2	**Skilled manual worker** (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc.)	**SEG C2**	
3	**Supervisory or clerical/ junior managerial/ professional/administrative** (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)	**SEG C1**	
4	**Intermediate managerial/ professional/ administrative** (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large	**SEG B**	

	organisation, principle officer in civil service/local government)		35
5	**Higher managerial/ professional/ administrative** (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees, top level civil servant/public service employee)	**SEG A**	
6	**Student**	**SEG C1**	
7	**Casual worker – not in permanent employment**	**SEG E**	
8	**Houseperson / Homemaker**	**SEG E**	
9	**Retired and living on state pension (i.e. no private or work-related pension scheme)**	**SEG E**	
10	**Unemployed or not working due to long-term sickness**	**SEG E**	
11	**Full-time carer (unpaid)**	**SEG E**	
95	Other	**SEG E**	
98	Prefer not to say	**NO SEG BAND ALLOACTED**	

Section A: Current use of postal service

INTRO TEXT. FORCE ON SCREEN FOR 5 SECONDS

When answering these questions, please **only think about letters that you and others in your household send and receive**. Please exclude any unaddressed leaflets (e.g. pizza delivery leaflets) and please think about letters only, not parcels.

If you are a business owner or send/receive letters as part of your role with a business or organisation, please **do not consider** those letters. For this survey we are only interested in sent or received in a **personal** capacity.

CAWI ONLY: SHOW BELOW TABLE AS HOVER OVER

CAPI ONLY: READ OUT BELOW TABLE IF NECESSARY

	Maximum weight	Maximum length	Maximum width	Maximum thickness	Examples
Letter	100g	24cm	16.5 cm	5mm	Letter from NHS or other healthcare provider Letter abouts benefits Standard size birthday card

					Utility bill
Large Letter	750g	35.3cm	25cm	2.5cm	Large birthday card
					A4 size (unfolded) papers (up to an inch thick) e.g. legal documents
					Magazine/catalogue
					Small item of clothing e.g. a pair of thin socks

Base: All respondents

SINGLE RESPONSE CAROUSEL. RANDOMISE

A0. Thinking about <u>letters, greetings cards and postcards</u>, how important is it to you that…

Please select one answer for each statement

Row Code	Row list	Scripting notes	Routing
1	Letters and cards are delivered to your home Monday to Friday		
2	Letters and cards are delivered to your home on Saturdays		
3	A next day delivery letter service is available (like current First Class post)		
4	You can be confident that letters and cards sent will be delivered on time		
5	The price of sending letters and cards is kept affordable		

Column code	Column list	Scripting notes	Routing
1	Not at all important		
2	Not very important		
3	Neither important nor unimportant		
4	Important		
5	Very important		
97	Don't know		

Base: All respondents

A1. How often do you and/or people in your household receive letters?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Never		
2	A few times a year		
3	About once a month		
4	About once a week		
5	A few times a week		
6	Every day (that it is possible for post to be delivered)		
96	I/we do receive letters, but I don't know how often		
97	Don't know if I/we receive any letters		

Base: Where 'never' receive letters or don't know if receive letters (A1=1 or A1=97)

SINGLE RESPONSE

A2. Can we just check - have you or anybody in your household received any of the following types of letters in the post **in the last year**?

Birthday cards, Council tax statements/bills, postcards, utility bills, letters from the NHS or other healthcare providers, letters from public bodies such as HMRC, Drivers Vehicle and Licensing Agency, bank statements, magazines, passports, addressed marketing materials.

Please select one only

Code	Answer list	Scripting notes	Routing
1	I/we **have never received** any of these in the past year		
2	I/we **have received** one or more of these in the past year	**FIX AT TOP**	
97	Don't know	**SEND TO A5**	

Base: Where never receive letters (A2=1)

OPEN RESPONSE

A3. Why have you not received any letters in the post in the past year?

Please write your answer in the box below

[_____]

97	Don't know	**TICK BOX**

Base: All who ever receive letter post (A1=2-6, 96 or A2=2)

A4. In **the last month, roughly how many** of each of the following items have you or members of your household received in the post?

Please only consider letter post that includes the address of the property.

Please select one per statement

Row Code	Row list	Scripting notes	Routing
1	Birthday/anniversary/occasion cards (either directly or through a third-party service e.g. Moonpig, Funky Pigeon)		
2	Invitations, postcards sent from within the UK, and personal letters (e.g. from a friend, relative or acquaintance)		
3	Hospital / Doctor's appointment letters from the NHS or other healthcare provider		
4	Medical test results		
5	Forms or paperwork related to receiving benefits (e.g. from DWP)		
6	Any other letter post from public bodies (e.g. your local council, HMRC, DVLA) excluding the NHS or other healthcare provider	**FIX WITH ABOVE CODE**	
7	Bills, invoices, bank statements or credit card statements		
8	Newsletters, leaflets and promotions from organisations you have a relationship with (e.g. a charity you support) and catalogues and brochures (e.g. Cotton Traders, Toolstation)		
9	Addressed direct mail from organisations you do not have a relationship with (e.g. fundraising letters)		
10	Magazines you subscribe to (e.g. The Week, Ideal Home, National Geographic, GQ)		
11	Small items received using large letter post (e.g. purchases made online from Vinted, eBay etc)		

Column code	Column list	Scripting notes	Routing
1	None - my household does not receive this type of letter		
2	None in the last month - but my household does occasionally receive this type of letter		
3	About 1		
4	About 2 - 5		
5	About 6 - 10		
6	More than 10		
96	I/we do receive this type of letter, but I don't know how often	**FIX**	
97	Don't know if I/we receive this type of letter	**FIX**	

Base: All respondents

CAROUSEL, SINGLE RESPONSE

A5. How often do you send anything using letter post?

This could include things like greetings cards, application forms, returning official documents, sending medical samples etc. Please only include letter post that you send within the UK.

Please select the answer that you think best describes how often you send

Code	Answer list	Scripting notes	Routing
1	Never		
2	A few times a year, or less often		
3	About once a month		
4	About once a week		
5	A few times a week		
6	Every day		
96	I send letters but I don't know how often	**FIX**	
97	Don't know if I send letters	**FIX**	

Base: Where 'never' send letters or don't know if send letters (A5=1 or A5=97)

SINGLE RESPONSE

A5A. Can we just check that you never send any letters, such as birthday/Christmas cards, application forms, or official documents like passport or benefits forms?

Please select one only

Code	Answer list	Scripting notes	Routing
1	I **do** at least occasionally send one or more of these		
2	I **never** send any of these		
97	Don't know		

Base: All who ever send post (A5=2-6, 96 or A5A=1)

CAROUSEL, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

A6. In the **last month, roughly how many** of each of the following items have you sent in the post?

Please only include items that you have sent within the UK.

Please select one per statement

Row Code	Row list	Scripting notes	Routing
1	Birthday/anniversary/occasion cards (either directly or through a third-party service e.g. Moonpig, Funky Pigeon)		
2	Invitations, postcards that you sent to a UK address from within the UK and personal letters (e.g. to a friend, relative or acquaintance)		
3	Letters / forms to the NHS or other healthcare providers		
4	Samples/ health tests to the NHS or other healthcare providers		
5	Forms or paperwork related to receiving benefits (e.g. to DWP)		
6	Any other letters / forms to public bodies (e.g. your local council HMRC, DVLA) excluding the NHS or other healthcare provider	**FIX WITH ABOVE CODE**	
7	Small items sent using large letter post (e.g. sales made online via Vinted, e-bay etc)		
8	Bill payments		
9	Post sent to businesses (e.g. lawyers, banks)		
10	Items requiring a signature on delivery		

Column code	Column list	Scripting notes	Routing
1	None – I do not send this type of letter		

2	None in the last month - but I occasionally send this type of letter		
3	About 1		
4	About 2 - 5		
5	About 6 - 10		
6	More than 10		
96	I do send these items, but I don't know how often	**FIX**	
97	Don't know if I send this type of item	**FIX**	

Base: All respondents

SINGLE RESPONSE

A6A. Do you ever use an online service such as Moonpig or Funky Pigeon to send physical cards (e.g. for a birthday or anniversary) directly to the recipient?

Please select one only

Code	Answer list	Scripting notes	Routing
1	No, I never use these		
2	Yes, I sometimes use these		
3	Yes, I always use these services instead of buying and posting cards in a letter box		
97	Don't know	**FIX**	

All who ever send letter post (A6=2-6, 96)

MULTI CODE RESPONSE CAROUSEL, PIPE THROUGH ANSWERS FROM A6 (ANY A6=2-6, 96)

A7. What type(s) of postage do you use for each of the types of letters you send?

Please select all that apply for each type of letter

Row Code	Row list	Scripting notes	Routing
1	Birthday/anniversary/occasion cards (either directly or through a third-party service e.g. Moonpig, Funky Pigeon)	**SHOW IF SELECTED AT A6=2-6, 96**	
2	Invitations, postcards that you sent to a UK address from within the UK and personal letters (e.g. to a friend, relative or acquaintance)	**SHOW IF SELECTED AT A6=2-6, 96**	
3	Letters / forms to the NHS or other healthcare providers	**SHOW IF SELECTED AT A6=2-6, 96**	
4	Samples/ health tests to the NHS or other healthcare providers	**SHOW IF SELECTED AT A6=2-6, 96**	

5	Forms or paperwork related to receiving benefits (e.g. to DWP)	**SHOW IF SELECTED AT A6=2-6, 96**	
6	Any other letters / forms to public bodies (e.g. your local council HMRC, DVLA) excluding the NHS or other healthcare provider	**SHOW IF SELECTED AT A6=2-6, 96** **FIX WITH ABOVE CODE**	
7	Small items sent using large letter post (e.g. sales made online via Vinted, e-bay etc)	**SHOW IF SELECTED AT A6=2-6, 96**	
8	Bill payments	**SHOW IF SELECTED AT A6=2-6, 96**	
9	Post sent to businesses (e.g. lawyers, banks)	**SHOW IF SELECTED AT A6=2-6, 96**	
10	Items requiring a signature on delivery	**SHOW IF SELECTED AT A6=2-6, 96**	

Column code	Column list	Scripting notes	Routing
1	First Class		
2	First Class signed for		
3	Second Class		
4	Second Class signed for		
5	Special delivery		
6	Other tracked service		
95	Other		
97	Don't know		

Base: Where use Second Class at all (Any A7=3-4)

MULTI RESPONSE, RANDOMISE

A8. Which of the below reasons, if any, describe why you send post using Second Class?

Please select all that apply

Fixed codes	Answer list	Scripting notes	Routing
1	To save money/ it is the cheapest option		
2	I always do this		
3	I don't believe First Class will get there faster		
4	The speed of delivery meets my needs		

5	They are the stamps I tend to buy or have to hand		
95	Other (please specify)	**FIX, ADD OPEN TEXT BOX**	
96	None of the above	**FIX, EXCLUSIVE**	
97	Don't know	**FIX, EXCLUSIVE**	

Base: Ask all

GRID, SINGLE CODE, RANDOMISE ROWS

A9. Have you heard of the two services below, and if so, have you used either of these services before?

Please select one answer for each statement

Row Code	Row list	Scripting notes	Routing
1	**Letter Redirections** - *This is Royal Mail's service where you can arrange to redirect your post to another address for a set period of time. People who move home often make use of it to allow time to inform people and organisations of their new address.*		
2	**Keepsafe** – *Keepsafe is a service that Royal Mail provides where they will hold onto your mail in a secure location while you're away from home. They will deliver your mail when you return home.*		

Column code	Column list	Scripting notes	Routing
1	I have used this service in the last 12 months		
2	I have heard of this service but I have not used it in the last 12 months		
3	I have heard of this service but never used it		
4	I have not heard of this service		
97	Not sure		

Base: All respondents

SINGLE CODE

A10. Do you ever use letter post to <u>send items</u> you have sold using online merchant sites such as eBay, Etsy, Facebook Marketplace?

Please only think about items you send to addresses within the UK that would fit into a small or large envelope or packet, no more than 1 inch/ 2.5 cm thick and weigh no more than 750g.

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		

Base: All who use letter post to sell items (A10=1)

SINGLE CODE

A11. Is the income you make from selling items on online merchant sites your main source of income?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		

Section B: Current Service

INTRO TEXT

Now some questions about today's postal service, and what matters to you.

Base: All who ever send post (A6=2-6,96)

GRID, SINGLE CODE

B1. Thinking about the types of letters you might send by Second Class post, please indicate how long after posting you would **typically need** them to arrive.

Please select one per statement

Row Code	Row list	Scripting notes	Routing
1	Birthday/anniversary/occasion cards (either directly or through a third-party service e.g. Moonpig, Funky Pigeon)	**SHOW IF SELECTED AT A6=2-6, 96**	
2	Invitations, postcards that you sent to a UK address from within the UK and personal letters (e.g. to a friend, relative or acquaintance)	**SHOW IF SELECTED AT A6=2-6, 96**	

3	Letters / forms to the NHS or other healthcare providers	**SHOW IF SELECTED AT A6=2-6, 96**	
4	Samples/ health tests to the NHS or other healthcare providers	**SHOW IF SELECTED AT A6=2-6, 96**	
5	Forms or paperwork related to receiving benefits (e.g. to DWP)	**SHOW IF SELECTED AT A6=2-6, 96**	
6	Any other letters / forms to public bodies (e.g. your local council HMRC, DVLA) excluding the NHS or other healthcare provider	**SHOW IF SELECTED AT A6=2-6, 96**	
7	Small items sent using large letter post (e.g. sales made online via Vinted, e-bay etc)	**SHOW IF SELECTED AT A6=2-6**	
8	Bill payments	**SHOW IF SELECTED AT A6=2-6**	
9	Post sent to businesses (e.g. lawyers, banks)	**SHOW IF SELECTED AT A6=2-6, 96**	
10	Items requiring a signature on delivery	**SHOW IF SELECTED AT A6=2-6, 96**	

Please note: Working days are defined as Monday to Saturday

Column code	Column list	Scripting notes	Routing
1	It doesn't matter if this takes longer than within 5 working days of posting, as long as it arrives safely in a reasonable amount of time		
2	This type of post **must typically** arrive within 5 working days of posting		
3	This type of post **must typically** arrive within 4 working days of posting		
4	This type of post **must typically** arrive within 3 working days of posting		
5	I would send this by First Class post as it would need to arrive more quickly		
97	Don't know		

Base: All who say they would send by Second Class and it must be delivered within 3 working days of posting (B1= 4)

OPEN

B2. You said at least some of the types of post you currently send using Second Class typically must arrive within 3 working days of posting.

If this did not happen and your Second Class letters took **one working day longer** to be delivered, how would you be impacted?

Please write your answer in the box below

[_____]

97	Don't know	**TICK BOX**
99	I would not be impacted	**TICK BOX**

Base: ASK ALL

MAXDIFF – 8 STATEMENTS, 8 SETS OF 3 STATEMENTS

B3. Thinking about the postal service and the sending and receiving of letters as a whole, we want to understand what you think is important.

To help us understand this, you will shortly be shown 8 short questions, each showing a set of 3 options. For each set, please select the one you feel is the most important and the one you feel is the least important to you.

RESPONDENT SHOWN 8 SETS OF 3 ATTRIBUTES AT RANDOM. FOR EACH SET ASKED TO IDENTIFY THE MOST IMPORTANT AND LEAST IMPORTANT OF THE 3 ATTRIBUTES

Please select which of the 3 things is the most important and least important to you.

Fixed codes	Answer list	Scripting notes	Routing
1	Letters sent Second Class are delivered within three working days		
2	Availability of a service that **guarantees** the delivery of a letter by the next day (at a higher price than standard stamps, like Royal Mail's Special Delivery Service)		
3	The security of personal or sensitive information		
4	The affordability of the service		
5	Availability of a First Class letter service that should arrive the next working day after posting		
6	Letters are delivered on weekdays		
7	Letters are delivered on Saturdays		
8	Letters are not lost or damaged		

Section C: Proposed Changes
INTRO TEXT

Please read this carefully

We will now ask you some questions about potential changes to the delivery of letters and cards. Over recent years the number of letters and cards being sent through the post has been falling. Because of this, Royal Mail has received less money from businesses and consumers but must still provide the same service and deliver six days a week.

In response to this, Ofcom is thinking about the future needs of people and businesses in the UK. Ofcom would like to understand whether the needs of the people and companies that send and/or receive mail would be met if certain changes were to be made to the delivery of letters and cards by Royal Mail.

PROPOSED CHANGES INTRO. FORCE ON SCREEN FOR 10 SECONDS

We are interested in your views of proposed changes to the frequency of delivery of letters and cards sent by Second Class post, and Standard Business Letters (for example, letters from organisations like the NHS or other healthcare providers, and local councils, bank statements and bills from businesses such as energy and water companies, including magazines that get delivered by post).

The proposed changes would have three main impacts:

Change 1
Letters and cards sent by Second Class post would no longer be delivered on Saturdays.
Change 2
Standard letters sent by businesses and organisations would no longer be delivered on Saturdays and could take a day longer to be delivered than they do today.
Change 3
If you sent a letter or card by Second Class post, it would no longer be delivered to the recipient on a Saturday and it may take a day longer to arrive than it would today.
No changes would be made at all to First Class letters service or **urgent** business mail (that is urgent letters sent by businesses or organisations).
No changes would be made to the delivery of parcels sent via Royal Mail.
From October 2024, the price of a standard Second Class letter stamp will be 85p and the price of a standard First Class letter stamp will be £1.65.

At the moment, when you use Second Class letter post in the UK you can expect it to arrive within 3 working days after the day it is posted (Saturday is currently counted as a working day). The new proposal means that Saturday would **no longer count as a working day for the Second Class service**, so if you posted the letter or card by Second Class post on a Wednesday, Thursday, Friday or Saturday you could expect it to arrive a day later than it would now.

HOVER OVER TEXT WHERE SPECIFIED IN BELOW QUESTIONS:

> Letters and cards sent by Second Class post would no longer be delivered on Saturdays.
> Standard letters sent by businesses and organisations would no longer be delivered on Saturdays and could take a day longer to be delivered than they do today.
> If you sent a letter or card by Second Class post, it would no longer be delivered to the recipient on a Saturday and it may take a day longer to arrive than it would today.

Base: All respondents

SINGLE CODE

C0. Before today, were you aware of the proposed changes to letter post?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		

Base: all who ever receive letters (A1=2-6 or 96 or A2=2)

CAROUSEL, SINGLE CODE PER ROW, PIPE ANSWERS FROM A4

C1. How much of an impact, if any, do you think these changes **[ADD HOVER OVER DEFINITION]** would have on you, when you consider the types of letters you **receive**?

As a reminder, letters and cards sent by Second Class post and standard letters from businesses and organisations would no longer be delivered on Saturdays and may take an extra day to arrive compared to current delivery times.

Please select one answer per type of post you receive

Row Code	Row list	Scripting notes	Routing
1	**PIPE OPTIONS FROM A4**	**SHOW IF SELECTED AT A4=2-6,96**	

Column Code	Row list	Scripting notes	Routing
1	This would make no difference to me		
2	This would be inconvenient, but not a big problem		
3	This would be a big inconvenience to me		
4	This would cause me substantial harm or difficulties – *if this happened, the service provided by Royal Mail would no longer meet my needs*		
97	Don't know	**FIX**	

Where 'big' negative impact in relation to receiving letters (Any C1=3 or 4)

OPEN

C2. You said that this would be a big inconvenience or would cause you substantial harm or difficulties in relation to some of the letters or cards you receive – why is this?

Please mention which type of letters you are referring to within your answer.

Please write your answer in the box below

[_____]

97	Don't know	TICK BOX

Where 'big' negative impact in relation to receiving letters (Any C1=3 or 4)

C3. How much of an impact would each of these proposed changes have on you?

Please select one answer per row

Fixed codes	Row list	Scripting notes	Routing
1	Not receiving Second Class post and standard business post on a Saturday		
2	Not receiving magazines in the post on a Saturday		
3	Receiving standard business letter post (e.g. bank statements, letters from HMRC / DVLA) one day later than at present		

Fixed codes	Column list	Scripting notes	Routing
1	This would make no difference to me		
2	This would be inconvenient, but not a big problem		
3	This would be a big inconvenience to me		
4	This would cause me substantial harm or difficulties – *if this happened the service provided by Royal Mail would no longer meet my needs*		
97	Don't know		

Base: All who ever send letters (A6 = Any = 2-6, 96)

GRID, SINGLE CODE, PIPE ANSWERS FROM A6

C4. How much of an impact would the proposed changes **[ADD HOVER OVER]** to Second Class post have in relation to the types of letters and cards that you **send**?

Please select one answer per type of post you send

Row Code	Row list	Scripting notes	Routing

	1	PIPE OPTIONS FROM A6	SHOW IF SELECTED AT A6=2-6,96	

Fixed codes	Column list	Scripting notes	Routing
1	This would make no difference to me		
2	This would be inconvenient, but not a big problem		
3	This would be a big inconvenience to me		
4	This would cause me substantial harm or difficulties – if this happened the service provided by Royal Mail would no longer meet my needs		
97	Don't know		

Where big negative impact in relation to sending specific letter types (Any C4=3 or 4)

OPEN

C4A. You said that this would be a big inconvenience or would cause you substantial harm or difficulties in relation to some of the letters or cards you send – why is this?

Please mention which type of letters you are referring to within your answer.

Please write your answer in the box below

[_____]

97	Don't know	TICK BOX

Base: All who would be impacted by changes when sending post or don't know (C4= 2, 3, 4, 97)

MULTI RESPONSE, **RANDOMISE**

C5. If all of the proposed changes **[ADD HOVER OVER]** were made, would you do any of the following?

As a reminder, letters and cards sent by Second Class post and standard letters from businesses and organisations would no longer be delivered on Saturdays and may take an extra day to arrive compared to current delivery times.

Please select all that apply

Column Code	Row list	Scripting notes	Routing

1	Start sending some more of my letters First Class		
2	Start sending all of my letters First Class		
3	Start sending some more of or all of my letters signed for or tracked		
4	Use a service other than Royal Mail for some or all of my letter post		
5	Use more online/ digital alternatives, such as email, instant messaging, social media or online forms.		
6	Use more methods of communication other than post or digital e.g. in person or over the telephone) instead of some or all of my letter post		
7	Send things earlier than I would previously need to		
95	Other (please specify)	**EXCLUSIVE, FIX, OPEN TEXT BOX**	
97	Don't know	**EXCLUSIVE, FIX**	
96	I would not make any changes	**EXCLUSIVE, FIX AT TOP**	

Base: All respondents

SINGLE RESPONSE CAROUSEL. RANDOMISE.

C7. Finally, taking everything into account, to what extent would there be an impact on you if…

Please select one answer for each

Column Code	Column list	Scripting notes	Routing
1	… standard business letters arrive a day later		
2	… Second Class letters and standard business letters aren't delivered on Saturdays		
3	Second class letters may take a day longer to arrive than they do today		

Column Code	Row list	Scripting notes	Routing
1	I wouldn't notice any difference		
2	I would notice the difference, but it would make no impact on me		

3	A slight negative impact on me		
4	A significant negative impact on me		
5	A very significant negative impact on me		
97	Don't know		

Closing demographics

Thank you for your responses. The final few questions are to find out more about you personally, to help us to further compare different groups of people. They include questions about your health, finances and ethnicity. They will not be used to attempt to identify you, but if you are uncomfortable answering any of these you have the option to select prefer not to answer to each question.

Base: All respondents

SINGLE RESPONSE

Z01. What is your current employment status?

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	Full time paid job (31+ hours)		
2	Part time paid job (<31 hours)		
3	Doing paid work on a self-employed basis or within your own business		
4	Studying at school or college		
5	Studying at university		
6	Taking part in a training programme e.g. traineeship or apprenticeship		
7	Out of work (6 months or less)		
8	Out of work (more than 6 months)		
9	Looking after home / Homemaker		
10	Retired		
11	Not in work due to ill health or disability		
12	Unpaid work for a business, community or voluntary organisation		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

Z02. What is your ethnicity?

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
	White	**HEADING NOT CODE**	
1	British/English/Welsh/Scottish/Northern Irish		
2	Irish		
3	Gypsy, Traveller or Irish Traveller		
4	Any other white background		
	Mixed	**HEADING NOT CODE**	
5	White and Black Caribbean		
6	White and Black African		
7	White and Asian		
8	Any other Mixed/ Multiple ethnic background		
	Asian and British Asian	**HEADING NOT CODE**	
9	Indian		
10	Pakistani		
11	Bangladeshi		
12	Chinese		
13	Any other Asian background		
	Black and Black British	**HEADING NOT CODE**	
14	African		
15	Caribbean		
16	Any other Black/ African/ Caribbean background		
	Other ethnic group	**HEADING NOT CODE**	
17	Arab		
95	Other		
98	Prefer not to say		

Base: All respondents

53

Z03. Which of the following best describes your total **annual household income** before tax?

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	Up to £10,399		
2	From £10,400 to £15,599		
3	From £15,600 to £25,999		
4	From £26,000 to £36,399		
5	From £36,400 to £51,999		
6	From £52,000 to £77,999		
7	£78,000 and above		
98	Prefer not to say		

Base: All respondents

MULTI RESPONSE

Z04. Which of these – if any – impact or limit daily activities or the work you can do?

Please select all that apply

Code	Answer list	Scripting notes	Routing
1	Hearing: Poor hearing, partial hearing, or are deaf		
2	Eyesight: Poor vision, colour blindness, partial sight, or are blind		
3	Mobility: Cannot walk at all/ use a wheelchair or mobility scooter etc., or cannot walk very far or manage stairs or can only do so with difficulty		
4	Dexterity: Limited ability to reach/ difficulty opening things with your hands/ difficulty using a telephone handset/ television remote control/ computer keyboard etc		
5	Breathing: Breathlessness or chest pains		
6	Mental abilities: Such as learning, understanding, concentration, memory, communicating, cognitive loss or deterioration		
7	Social/ behavioural: Conditions associated with this such as autism, attention deficit disorder, etc		
8	Your mental health: Anxiety, depression, or trauma-related conditions, for example		

9	Other illnesses/ conditions which impact or limit your daily activities or the work you can do	**ADD OPEN TEXT BOX**	
10	Nothing: no impairments or conditions impact or limit your daily activities or the work you can do	**SINGLE CODE**	
98	Prefer not to say	**SINGLE CODE**	

Base: All respondents

OPEN RESPONSE, FORCE NUMERIC, CAP AT 20, DO NOT PERMIT 0

Z05. What is the total number of people in the household (**including yourself,** other adults and any children)?

Please type your response in the box below

[_____]

97	Don't know / Prefer not to say	**TICK BOX**

Base: All respondents except Z05=1 or Don't know/ prefer not to say

NUMERIC, WHOLE NUMBERS ONLY, MIN 0, MAX 30. DO NOT ALLOW TO EXCEED NUMBER OF PEOPLE GIVEN AT Z05.

Z06. And what is the total number of **children** in the household (aged under 18).

If you are aged under 18, please include yourself in this total.

Please type your response in the box below

[_____]

97	Don't know / Prefer not to say	**TICK BOX**

Base: Where have at least one child in household (Z06>0)

MULTI RESPONSE

Z07. What age(s) are the children in your household?

Please select all that apply

Fixed codes	Answer list	Scripting notes	Routing
1	0-3		
2	4-6		
3	7-9		
4	10-12		
5	13-15		
6	16-17		
98	Prefer not to say	**EXCLUSIVE**	

Base: All respondents

Z08. Does anyone in your household – including yourself – receive any of the following benefits?

Please select all that apply

Code	Answer list	Scripting notes	Routing
1	Income Support		
2	Income-based Jobseeker's Allowance		
3	Pensions Credit		
4	Employment and Support Allowance (ESA)		
5	Universal Credit (and household has other earnings)		
6	Universal Credit (and household does not have other earnings)		
7	Personal Independence Payment (PIP)		
8	Carer's Allowance		
9	Disability Living Allowance		
95	Something else – Please say	**ADD OPEN TEXT BOX**	
96	None – do not receive any benefits	**SINGLE CODE**	
97	Don't know	**SINGLE CODE**	
98	Prefer not to say	**SINGLE CODE**	

Base: All respondents

SINGLE RESPONSE

Z09. How well would you say your household is manging financially at the moment? Would you say that you are…?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Doing well		
2	Getting by		
3	Struggling		
97	Don't know/prefer not to say	**FIX**	

Base: All respondents

SINGLE RESPONSE

Z10. Finally, BMG may want to conduct some further research to follow up on some of the issues covered here in more depth. Would you be happy for BMG to contact you again in the next 6 months as part of any follow up research?

Fixed codes	Answer list	Scripting notes	Routing
1	Yes		
2	No	**EXCLUSIVE**	**SHOW CLOSING TEXT IF CHOSEN**

Base: If Z10= 1 (agree to recontact)

MULTIPLE RESPONSE

Z11. Thank you. Please enter your details below:

Fixed codes	Answer list	Scripting notes	Routing
1	Name	**OPEN RESPONSE**	
2	Email address	**OPEN RESPONSE**	
3	Contact number	**OPEN RESPONSE**	
98	I would prefer not to give these details	**EXCLUSIVE, FIX AT BOTTOM**	

CLOSING TEXT

You have reached the end of the survey. Thank you for taking the time to answer our questions. Your input is really appreciated.

Please **click next** to submit your responses.

A3.2 SME questionnaire

Survey introduction

ONLINE INTRO

We are conducting a survey on behalf of Ofcom about your organisation's use of postal letter services. Ofcom is the UK regulator for communications services used in the UK, including post, mobile phone, broadband, landline and pay-tv services. This survey is specifically about use of the postal service for sending and receiving letters and large letters for business purposes.

The results of this study will help Ofcom better understand your organisation's current postal needs for letters, and how these might change in the future. All user views are important, even if your organisation rarely sends or receives letter post.

The survey will take around **15-20 minutes to complete.**

Just to confirm, your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is here http://www.bmgresearch.co.uk/privacy

Click **NEXT** to begin the survey

By clicking the **NEXT** button, you agree to participate in the survey and to have all answers you provide from this point processed.

CATI INTRO

Good morning/ afternoon, my name is ^GetCatiInterviewerName()^ and I am calling on behalf of Ofcom from BMG, an independent research organisation.

^f('MOBILE').any('1') ? "Can I just check that if you are using a mobile phone it is safe for you to talk?" : ""^

We are conducting a survey on behalf of Ofcom, the UK regulator for communications services, ~~s~~ focusing on organisations' use of postal letter services The results will help Ofcom understand your postal needs. All views are important, even if your organisation rarely uses letter post. If you can answer questions about your organisation's postal service needs, this is your opportunity to have your say about changes to the postal service which may affect your organisation.

The survey will take no more than **30 minutes to complete. Are you able to spare that time now or can I arrange a time to call back?**

Just to confirm, your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times. Please note, calls are recorded for monitoring and training purposes.

You can find out more information about our surveys and-what we do with the information we collect in our Privacy Notice which is on our website.

IF NECESSARY: I can give you the website address (https://www.bmgresearch.co.uk/privacy) now over the phone or by email.

 [IN WALES ONLY] Participation in Welsh is available on request, please email [email address removed]

INTERVIEWER: Confirm respondent happy to proceed with the survey

 ✓ Informed consent provided **[TICK BOX, DO NOT ALLOW TO PROCEED WITHOUT TICKED]**

Postal Screener

Base: CAWI Respondents

MULTI RESPONSE

S0. Thinking about your role at work, please indicate which of the following you have some responsibility for:

CAWI: Please select all that apply

Fixed codes	Answer list	Scripting notes	Routing
1	The organisation's post (i.e. sending and receiving letters)	**SCREENOUT IF NOT SELECTED**	
2	Human resources (e.g. recruitment, salaries)		
3	IT services and systems		
4	Managing company finances		
5	Health, safety and environment issues		
99	None of the above		

CATI S0SCREENOUT SHOW IF SCREENOUT AT S0 (2-99)

Thank you for your time but we are looking to speak to the person who has responsibility for your organisation's post.

Base: All respondents

S1CATI. Can I just check, are you able to answer questions about your organisation's needs from postal services for letters, and the types and volumes of letter post sent and received by your organisation within the UK?

S1CAWI Are you able to answer questions about your organisation's needs from postal services for letters, and the types and volumes of letter post sent and received by your organisation within the UK?

1	Yes	Continue
2	No	**CATI:** Ask to be transferred to the correct person. If not possible at that time, call back later. If refused, thank and close.-**AS ABOVE CATI S0SCREENOUT** **CAWI: CLOSE**

Base: All respondents

OPEN RESPONSE

S2 CATI. Could I just take your job title or role in the organisation?
S2 CAWI Which of these job roles best reflects your current role?

CAWI: Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	Owner		
2	Senior Management (Managing Director, other Director)		
3	Marketing		
4	Customer Relationship Management		
5	Customer Service		
6	Procurement		
7	Finance/Accounts		
8	Operations		
9	Facilities		
10	Mailroom		
11	Office Admin / Office Management		
96	Other type of role (PLEASE BRIEFLY DESCRIBE)	**FIX, OPEN TEXT BOX**	
98	Prefer not to say	**FIX, EXCLUSIVE**	

Secondary Introduction

CATI READ OUT

CAWI: FORCE ON SCREEN FOR 5 SECONDS

The survey is about your use of **postal letter services**. By letters, we mean standard letters such as bills, invoices etc.

Postal letter services also include larger letters that may contain small items up to 750g in weight and that will fit into an envelope or slim packet, such as craft materials, make-up or small DIY items such as nuts and bolts. They might also include A4 sized magazines, catalogues and books that are up to about 1 inch/ 2.5 cm thick etc.

Parcels are not included in this piece of research.

CAWI- SHOW IMAGES

Screening & Profiling (Section S)

Base: All respondents

SINGLE CODE

S1. Firstly, approximately how many people, including yourself, work for your organisation in the UK?

Please consider all full time and part time employees, including owners or partners, but please exclude any sub-contractors.

CATI: READ OUT

CAWI: Please select one only

Code	Answer list	Scripting notes	Routing
1	1		
2	2-9		
3	10-49		
4	50-249		
5	250+	SCREEN OUT	
97	Don't know	DO NOT READ OUT. SCREEN OUT	

S1SCREENOUT Thank you for your time but we are looking to speak to organisations with fewer than 250 employees.

BASE: CATI SAMPLE

SINGLE RESPONSE

S2CATI. I have **[READ OUT SIC DESCRIPTION FROM SAMPLE]** as a general Classification for your organisation. Does this sound about right?

Codes	Answer list	Scripting notes	Routing
1	Yes		
2	No		

Base: Where general Classification doesn't sound right (S4CATI= 2)

SINGLE RESPONSE

S2CATIB. What is the main activity of your organisation?

PROBE AS NECESSARY

What would you type into a search engine to find an organisation like yours online?

What is the main product or service or role of your organisation?

What exactly is made or done by your organisation? Who does it sell its products/services to?

PROBE AS NECESSARY AND CODE 1

Codes	Answer list	Scripting notes
1	Agriculture, Forestry, & Fishing	
2	Mining and Quarrying	
3	Manufacturing	
4	Electricity, gas, steam & Air conditioning supply	
5	Water Supply, sewerage, waste management	

6	Construction	
7	Wholesale & Retail Trade; repair of motor vehicles and motorcycles	
8	Transportation and storage	
9	Accommodation and food service activities	
10	Information and communication	
11	Financial and insurance activities	
12	Real estate activities	
13	Professional, scientific and technical activities	
14	Administrative and support service activities	
15	Public administration and defence compulsory social security	
16	Education	
17	Human health and social work activities	
18	Arts, entertainment and recreation	
19	Other service activities	
95	Other (PLEASE SPECIFY)	**OPEN TEXT BOX**
97	Don't know	**SCREENOUT**

S2CATIBSCREENOUT Thank you for your time, that is all I have to ask you today.

Base: All CAWI sample

SINGLE RESPONSE

S2AW. Which industry does your organisation belong to?

Please select one only

Codes	Answer list	Scripting notes
1	Agriculture, Forestry, & Fishing	
2	Mining and Quarrying	
3	Manufacturing	
4	Electricity, gas, steam & Air conditioning supply	
5	Water Supply, sewerage, waste management	
6	Construction	
7	Wholesale & Retail Trade; repair of motor vehicles and motorcycles	
8	Transportation and storage	
9	Accommodation and food service activities	

Codes	Answer list	Scripting notes
10	Information and communication	
11	Financial and insurance activities	
12	Real estate activities	
13	Professional, scientific and technical activities	
14	Administrative and support service activities	
15	Public administration and defence compulsory social security	
16	Education	
17	Human health and social work activities	
18	Arts, entertainment and recreation	
19	Other service activities	
95	Other (PLEASE SPECIFY)	**OPEN TEXT BOX**
97	Don't know	**SCREENOUT**

Base: All respondents

SINGLE CODE
S3. What is the approximate annual turnover of your whole organisation in the UK?

CATI: READ OUT IF NECESSARY
CAWI: Please select one only

Codes	Answer list	Scripting notes
1	Up to £49,999	
2	£50,000 - £99,999	
3	£100,000 - £199,999	
4	£200,000 - £299,999	
5	£300,000 - £399,999	
6	£400,000 - £499,999	
7	£500,000 - £749,999	
8	£750,000 - £999,999	
9	£1,000,000 - £1,499,999 (1 million to 1.5 million)	
10	£1,500,000 - £1,999,999 (1.5 million to 2 million)	
11	£2,000,000 - £4,999,999 (2 million to 5 million)	
12	£5,000,000 + (more than 5 million)	

97	Don't know / not sure / not applicable	**CATI: DO NOT READ OUT**
99	**CATI:** Refused **CAWI:** Prefer not to say	**CATI ONLY: DO NOT READ OUT**

Base: All respondents

SINGLE CODE

S4. Where in the UK is the head office/main site of your organisation?

CATI: READ OUT IF NECESSARY

CAWI: Please select one only

Code	Answer list	Scripting notes	Routing
1	East of England		
2	East Midlands		
3	Greater London		
4	North East		
5	North West		
6	South East		
7	South West		
8	West Midlands		
9	Yorkshire and The Humber		
10	Scotland		
11	Wales		
12	Northern Ireland		
97	Don't know	**SCREENOUT**	

Base: All CAWI respondents

S4.5 Which of the following best describes the location of the business?

SINGLE CODE

1	Large City (population: more than 500,000)
2	Smaller city / large town (population: 100,000 – 500,000)
3	Medium town (population: 15,000 – 99,999)
4	Small town (population: 2,000 – 14,999) within 10 miles of a large settlement
5	Small town (population: 2,000 – 14,999) further than 10 miles from a large settlement
6	Rural area (population: less than 2,000) within 10 miles of a large settlement
7	Rural area (population: less than 2,000) further than 10 miles from a large settlement
8	Prefer not to say

CODES:

1,2,3,4,5 = Urban

6/7= Rural

Base: All respondents

S5. How often does your organisation receive letters?

CATI: READ OUT IF NECESSARY

CAWI: Please select one only

Code	Answer list	Scripting notes	Routing
1	Never		
2	A few times a year, or less often		
3	About once a month		
4	About once a week		
5	A few times a week		
6	Every day (that it is possible for post to be delivered)		
96	My organisation does receive letters, but I don't know how often		
97	Don't know if my organisation receives any letters		

Base: Where 'never' receive letters or don't know if receive letters (S5=1 or 97)

S5ACAWI. Can we just check - has your organisation received any of the following types of letters in the post **in the last year**?

Invoices, legal documents, utility bills, letters from public bodies such as HMRC, bank statements, insurance documents, addressed marketing materials.

S5ACATI. Can I just check - has your organisation received any of the following in the last year?

Invoices, legal documents, utility bills, letters from public bodies such as HMRC, bank statements, insurance documents, addressed marketing materials.

CAWI: Please select one only

Code	Answer list	Scripting notes	Routing
1	My organisation **has received** one or more of these in the past year		
2	My organisation **has never received** any of these in the past year		

97	Don't know		

Base: All respondents

S6. How often does your organisation send anything using letter post?

This could include things like invoices, customer communications, marketing materials, official documents, application forms or Large Letter envelopes containing small items. Please only include letter post that you send within the UK.

CATI: READ OUT IF NECESSARY

CAWI: Please select the answer that you think best describes how often you send letters

Code	Answer list	Scripting notes	Routing
1	Never		
2	A few times a year, or less often		
3	About once a month		
4	About once a week		
5	A few times a week		
6	Every day		
7	Multiple times a day		
96	My organisation sends letters but I don't know how often	**FIX**	
97	Don't know if organisation sends letters	**FIX**	

Base: Where 'never' send letters or don't know if send letters (S6=1 or S6=97)

SINGLE RESPONSE

S6ACAWI. Can we just check that your organisation never sends any letters, such as invoices, application forms, or official documents?

S6ACATI. Can I just check that your organisation never sends any letters, such as invoices, application forms, or official documents?

CAWI: Please select one only

Code	Answer list	Scripting notes	Routing
1	My organisation does at least occasionally send one or more of these		
2	My organisation **never** sends any of these		
97	Don't know		

Base: Where 'never' send or receive letters (S5A=2 OR 97 AND S6A=2 OR 97)

S6B. You said that your organisation never sends or receives any letters, such as invoices, application forms, or official documents. Why is this?

CAWI: Please write your answer in the box below

[_____]

97	Don't know	**TICK BOX**

CAWI: IF DO NOT SEND OR RECEIVE POST, OR DON'T KNOW, (S5A=2 OR 97 <u>AND</u> S6A=2 OR 97) SCREEN OUT AND SHOW:

Thank you for answering our questions. For the rest of the survey, we want to talk to businesses about the post they send and receive. As you have said your business does not send or receive letter post, you can now submit your responses by clicking SUBMIT.

CATI: IF DO NOT SEND OR RECEIVE POST, OR DON'T KNOW, SCREEN OUT AND READ OUT:

Thank you for answering our questions. For the rest of the survey, we want to talk to businesses about the post they send and receive. As you have said your business does not send or receive letter post, this is all we need from you today.

Base: All who ever send letter post (S6=2-7, 96 or S6A=1)

SINGLE CODE

S7. Approximately how much does your organisation spend on **postage for letters** in an average year? By this we mean all letters that are sent in the UK with Royal Mail or other postal service operators for business purposes. Please do not include costs for envelopes or other services that may be associated with sending letters, we are just interested in the cost of the postage.

CATI: READ OUT IF NECESSARY, OTHERWISE CODE IN RANGE

CATI IF NECESSARY: Please exclude spend on sending parcels

CATI IF STILL NECESSARY: By letter we mean standard and large-sized letters

CAWI: Please select one only

Codes	Answer list	Scripting notes
1	Less than £5	
2	£5-£9	
3	£10 – £25	
4	£26 - £50	
5	£51 - £100	
6	£101 - £200	
7	£201-£300	
8	£301-£400	
9	£401-£500	
10	£501-£1000	

11	£1001-£2000	
12	More than £2000	
97	Don't know / not sure	**CATI: DO NOT READ OUT**

Base: All who ever send letter post (S6=2-7, 96 or S6A=1)

MULTI CODE, RANDOMISE CODES 1-3
S8. In the last year, has your organisation used any of the below methods for sending letter post?

CATI READ OUT: Royal Mail Bulk Services offer businesses mailing options for sending large volumes of letters, or marketing materials with tracking and delivery options

CAWI: Royal Mail Bulk Services offer businesses mailing options for sending large volumes of letters, or marketing materials with tracking and delivery options

CATI: READ OUT
CAWI: Please select all that apply

Code	Answer list	Scripting notes	Routing
1	Royal Mail Bulk Services		
2	Royal Mail Franking machine		
3	A letter delivery company other than Royal Mail		
4	No, none of these	**EXCLUSIVE, FIX**	
97	Don't know	**CATI:DO NOT READ OUT** **EXCLUSIVE, FIX**	

Base: All respondents

SINGLE CODE

CATI: READ OUT IF NECESSARY

S9. You said your head office is located in **[PIPE ANSWER FROM S4].** Is letter post sent from and/or received at this location?

CAWI: Please select one only

Code	Answer list
1	Yes
2	No

Base: All respondents

MULTI RESPONSE

WHERE POST NOT SENT FROM THIS LOCATION (S9=2)

S10. Where else in the country does your organisation have sites where letter post is sent from and/or recieved?

WHERE POST IS SENT FROM THIS LOCATION (S9=1)

S10: Does your organisation have any other locations where letter post is sent from and/or received, and if so, where?

CATI PROMPT WITH CODES IF NECESSARY
CAWI: Please select all that apply

MASK ANSWER FROM S4

Row codes	Row list	Scripting notes	Routing
1	East Midlands		
2	East of England		
3	North East		
4	North West		
5	London		
6	South East		
7	South West		
8	West Midlands		
9	Yorkshire and Humberside		
10	Scotland		
11	Wales		
12	Northern Ireland		
13	No, this is the only location	**EXCLUSIVE, DO NOT SHOW IF S9=2**	
97	Don't know	**DO NOT READ OUT. EXCLUSIVE**	

Base: SHOW ALL

For the following questions, please think about the whole of your organisation that is operating in the UK. If your organisation is multi-national, please only consider the UK organisation when answering.

Base: All respondents

SINGLE CODE
S11. Which one of the following statements best describes the role of letter post services to your organisation?

CAWI: Please select one only

CATI: READ OUT

Codes	Answer list	Scripting notes
1	Letter post is used mainly for administrative needs and is not core to the main function of our organisation	
2	Letter post is very important to our organisation	
3	Letter post is core to our organisation operations (i.e. our organisation could not function without it)	
97	Don't Know	**CATI: DO NOT READ OUT**

Section A: Current use of postal service

INTRO TEXT

CATI: READ OUT

When answering these questions, please only think about letters that **your organisation sends and/or receives**. As a reminder, please think about letters only, not parcels.

CATI: READ OUT

CAWI: SHOW

Letter: The maximum weight is 100 grams, with dimensions up to 24 cm in length, 16.5 cm in width, and 5 mm in thickness; examples include invoices, recruitment letters, and flyers.

Large Letter: The maximum weight is 750 grams, with dimensions up to 35.3 cm in length, 25 cm in width, and up to 2.5 cm thick; examples include A4 documents (up to an inch thick), legal papers, magazines, catalogues, and small items.

CAWI ONLY: SHOW BELOW TABLE

	Maximum weight	Maximum length	Maximum width	Maximum thickness	Examples
Letter	100g	24cm	16.5 cm	5mm	Invoices, recruitment-related letters, flyers
Large Letter	750g	35.3cm	25cm	2.5cm	A4 size (unfolded) papers (up to an inch thick) e.g. legal documents Magazine/catalogues Small parts/ items

Base: All respondents

SINGLE RESPONSE. RANDOMISE

CAWI: CAROUSEL.

CATI: READ OUT AND CODE ONE FOR EACH STATEMENT. READ OUT COLUMN CODES ONCE ONLY UNLESS NECESSARY

A1. Thinking about <u>letters</u> your organisation sends and receives, how important is it to your organisation that…

CAWI: Please select one answer for each statement

Row Code	Row list	Scripting notes	Routing
1	Letters are delivered Monday to Friday		
2	Letters are delivered on Saturdays		
3	A next day delivery letter service is available (like current First Class post)		
4	You can be confident that letters sent will be delivered on time		
5	The price of sending letters is kept affordable		

Column code	Column list	Scripting notes	Routing
1	Not at all important		
2	Not very important		
3	Neither important nor unimportant		
4	Important		
5	Very important		
97	Don't know		

Base: All who ever receive letter post (S5=2-6,96 OR S5A=1)

CAROUSEL, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

CATI: READ OUT SCALE ON FIRST STATEMENT ONLY

A2. In the **last month**, approximately how many of each of the following items has your organisation received in the post?

Please consider letter post that includes the address of the organisation on it.

CATI: READ OUT, READ OUT COLUMN CODES ONCE ONLY UNLESS NECESSARY

CAWI: Please select one per statement

Row Code	Row list	Scripting notes	Routing
1	Forms or letters from customers, clients or subscribers		

2	Any letter post from public bodies (e.g. your local council, HMRC, DBT)		
3	Bills, invoices, bank statements or credit card statements		
4	Trade magazines, Newsletters, leaflets and promotions from organisations you have a relationship with (e.g. third party suppliers)		
5	Addressed direct mail from organisations you do not have a relationship with (e.g. marketing)		
6	Small items received using large letter post (e.g. small parts)		

Column code	Column list	Scripting notes	Routing
1	None - my organisation does not receive this type of letter		
2	None in the last month - but my organisation does occasionally receive this type of letter		
3	About 1-10		
4	About 11-50		
5	About 51-100		
6	More than 100		
96	My organisation does receive this type of letter, but I don't know how many	**FIX**	
97	Don't know if my organisation receives this type of letter	**FIX**	

A3INTRO. We would now like you to think about letters that your organisation **SENDS**

Base: All who ever send letter post (S6=2-7, 96 or S6A=1)

CAROUSEL, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

A3. In the **last month**, how many of each of the following types of items has your organisation sent in the post?

Please only include items that you have sent within the UK, to destinations within the UK.

If your business has more than one site, please include all letters across all sites if possible.

CATI: READ OUT, READ OUT OPTIONS ONCE ONLY UNLESS NECESSARY

Row Code	Row list	Scripting notes	Routing
1	Forms or letters to customers, clients or subscribers		
2	Any letter post to public bodies (e.g. your local council, HMRC, DBT)		
3	Bills/invoices to customers/clients		
4	Marketing material to your customers/clients, including leaflets, promotions, brochures, newsletters etc.		
5	Addressed direct mail to people or organisations you do not have a relationship with (e.g. marketing)		
6	Small items sent using large letter post, for example to fulfil customer orders (e.g. small parts)		

Column code	Column list	Scripting notes	Routing
1	None - my organisation does not send this type of post		
2	None in the last month - but my organisation does occasionally send this type of post		
3	About 1-10		
4	About 11-50		
5	About 51-100		
6	More than 100		
96	My organisation does send this type of post, but I don't know how many		
97	Don't know if my organisation sends this type of post		

Base: All who ever send letter post (Any A3=2-6, 96)

MULTI CODE RESPONSE GRID, PIPE THROUGH ANSWERS FROM A3 (ANY A3=2-6, 96)

A4. What type(s) of postage do you use for each of the types of letters you send?

CATI: READ OUT, READ OUT COLUMN CODES ONCE ONLY UNLESS NECESSARY

CAWI: Please select all that apply for each type of letter you send

Row Code	Row list	Scripting notes	Routing
1	Forms or letters to customers, clients or subscribers	**SHOW IF SELECTED AT A3=2-6, 96**	
2	Any letter post to public bodies (e.g. your local council, HMRC, DBT)	**SHOW IF SELECTED AT A6=2-6, 96**	
3	Bills/ invoices to customers/clients	**SHOW IF SELECTED AT A3=2-6, 96**	
4	Marketing material to your customers/clients, including leaflets, promotions, brochures, newsletters etc.	**SHOW IF SELECTED AT A3=2-6, 96**	
5	Addressed direct mail to people or organisations you do not have a relationship with (e.g. marketing)	**SHOW IF SELECTED AT A3=2-6, 96**	
6	Small items sent using large letter post, for example to fulfil customer orders (e.g. small parts)	**SHOW IF SELECTED AT A3=2-6, 96**	

Column code	Column list	Scripting notes	Routing
1	First Class		
2	First Class signed for		
3	Second Class		
4	Second Class signed for		
5	Special delivery		
6	Other tracked service		
7	Bulk mail	**SHOW IF S8=1**	
95	Other		
97	Don't know		

Base: Where use Second Class at all (Any A4=3-4)

MULTI RESPONSE. RANDOMISE

A5. Which of the below reasons, if any, describe why your organisation sends post using Second Class?

CATI: READ OUT IF NECESSARY

CAWI: Please select all that apply

Fixed codes	Answer list	Scripting notes	Routing

1	To save money/ it is the cheapest option		
3	There is no expectation that First Class will get there faster		
4	The speed of delivery meets our needs		
95	Other (please specify)	**FIX , ADD OPEN TEXT BOX**	
96	None of the above	**FIX, EXCLUSIVE CATI: DO NOT READ OUT**	
97	Don't know	**FIX, EXCLUSIVE CATI: DO NOT READ OUT**	

Base: All respondents

SINGLE CODE

A6. Do you ever use **letter post** to send small items to customers, for example to fulfil orders?

Please only think about items you send to people within the UK that would fit into a small or large envelope or packet, no more than 1 inch/ 2.5 cm thick and weighing no more than 750g.

CAWI: Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know	**CATI: DO NOT READ OUT**	

Section B: Current services

INTRO TEXT

Now some questions about today's postal letters service, and what matters to your organisation …

Base: All who ever send letter post (Any A3=2-6,96)

GRID, SINGLE CODE

B1. Thinking about the types of letters your organisation might send by Second Class post, please indicate how long after posting you would **typically need** them to arrive.

CATI: READ OUT, READ OUT COLUMN CODES ONCE ONLY UNLESS NECESSARY

CAWI: Please select one per type of letter you send

Row Code	Row list	Scripting notes	Routing
1	Forms or letters to customers, clients or subscribers	**SHOW IF SELECTED AT A3=2-6, 96**	

Column code	Column list	Scripting notes	Routing
2	Any letter post to public bodies (e.g. your local council, HMRC, DBT)	**SHOW IF SELECTED AT A3=2-6, 96**	
3	Bills/invoices to customers/clients	**SHOW IF SELECTED AT A3=2-6, 96**	
4	Marketing material to our customers/clients, including leaflets, promotions, brochures, newsletters etc.	**SHOW IF SELECTED AT A3=2-6, 96**	
5	Addressed direct mail to people or organisations you do not have a relationship with (e.g. marketing)	**SHOW IF SELECTED AT A3=2-6, 96**	
6	Small items sent using large letter post, for example to fulfil customer orders (e.g. small parts)	**SHOW IF SELECTED AT A3=2-6, 96**	

CATI: READ OUT: WORKING DAYS ARE DEFINED AS MONDAY TO SATURDAY

Please note: Working days are defined as Monday to Saturday

Column code	Column list	Scripting notes	Routing
1	It doesn't matter if this takes longer than within 5 working days of posting, as long as it arrives safely in a reasonable amount of time		
2	This type of post **must typically** arrive within 5 working days of posting		
3	This type of post **must typically** arrive within 4 working days of posting		
4	This type of post **must typically** arrive within 3 working days of posting		
5	We would send this by First Class post as it would need to arrive more quickly		
97	Don't know		

Base: All who say they would send by Second Class and it must be delivered within 3 working days of posting (B1= 4)

OPEN

B2. You said at least some of the types of post your organisation currently sends using Second Class typically must arrive within **3 working days** of posting.

If this did not happen and your organisation's Second Class letters took **one working day longer** to be delivered, how would your organisation be impacted?

CATI: PROBE AND WRITE IN VERBATIM

CAWI: Please write your answer in the box below

[_____]

97	Don't know	**TICK BOX**
99	Organisation would not be impacted	**TICK BOX**

Base: ALL CAWI PANEL RESPONDENTS ONLY

MAXDIFF – 8 STATEMENTS, 8 SETS OF 3 STATEMENTS

B3. Thinking about the postal service and the sending and receiving of letters as a whole, we want to understand what you think is important to your organisation.

To help us understand this, you will shortly be shown 8 short questions, each showing a set of 3 options. For each set, please select the one you feel is the most important and the one you feel is the least important to your organisation.

RESPONDENT SHOWN 8 SETS OF 3 ATTRIBUTES AT RANDOM. FOR EACH SET ASKED TO IDENTIFY THE MOST IMPORTANT AND LEAST IMPORTANT OF THE 3 ATTRIBUTES

Please select which of the 3 things is the most important and least important to you.

Fixed codes	Answer list	Scripting notes	Routing
1	Letters sent Second Class are delivered within three working days		
2	Availability of a service that **guarantees** the delivery of a letter by the next day (at a higher price than standard stamps, like Royal Mail's Special Delivery Service)		
3	The security of personal or sensitive information		
4	The affordability of the service		
5	Availability of a First Class letter service that should arrive the next working day after posting		
6	Letters are delivered on weekdays		
7	Letters are delivered on Saturdays		
8	Letters are not lost or damaged		

Section C: Proposed Changes

INTRO TEXT

CATI:READ OUT IN FULL

CAWI: Please read this carefully

We will now ask you some questions about potential changes to the delivery of letters. Over recent years the number of items being sent using letter post has been falling. Because of this, Royal Mail has received less money from organisations and consumers but must still provide the same service and deliver six days a week.

In response to this, Ofcom is thinking about the future needs of people and organisations in the UK. Ofcom would like to understand whether the needs of the people and companies that send and/or receive mail would be met if certain changes were to be made to the delivery of letters by Royal Mail.

PROPOSED CHANGES INTRO.

CAWI: FORCE ON SCREEN FOR 10 SECONDS

CATI: READ OUT

We are interested in your views of proposed changes to the frequency of delivery of letters sent by Second Class post, and Standard Business Letters (i.e. those that are typically sent by larger organisations or those that send a high volume of letters)..

The proposed changes would have three main impacts:

Change 1   Letters sent by Second Class post would no longer be delivered on Saturdays.
Change 2   Standard letters sent by businesses and organisations would no longer be delivered on Saturdays and could take a day longer to be delivered than they do today.
Change 3   If you sent a letter by Second Class post, it would no longer be delivered to the recipient on a Saturday and it may take a day longer to arrive than it would today.
No changes would be made at all to First Class letters service or **urgent** business mail (that is urgent letters sent by businesses or organisations).
No changes would be made to the delivery of parcels sent via Royal Mail.
From October 2024, the price of a standard Second Class letter stamp will be 85p and the price of a standard First Class letter stamp will be £1.65.

At the moment, when you use Second Class letter post in the UK you can expect it to arrive within 3 working days after the day it is posted (Saturday is currently counted as a working day). The new proposal means that Saturday would **no longer count as a working day for the Second Class service**, so if you posted the letter by Second Class post on a Wednesday, Thursday, Friday or Saturday you could expect it to arrive a day later than it would now.

HOVER OVER TEXT WHERE SPECIFIED IN BELOW QUESTIONS/CATI READ OUT IF NECESSARY:

> Letters sent by Second Class post would no longer be delivered on Saturdays.
> Standard letters sent by businesses and organisations would no longer be delivered on Saturdays and could take a day longer to be delivered than they do today.
> If you sent a letter by Second Class post, it would no longer be delivered to the recipient on a Saturday and it may take a day longer to arrive than it would today.

Base: All respondents

SINGLE CODE

C0. Before today, were you aware of these proposed changes to letter post?

CATI: DO NOT READ OUT

CAWI: Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		

Base: all who ever receive letters (Any A2=2-6,96)

CAROUSEL, SINGLE CODE, PIPE ANSWERS FROM A2

C1. How much of an impact, if any, do you think these changes **ADD HOVER OVER/ CATI READ OUT DEFINITION IF NECESSARY** would have on your organisation, when you consider the types of letters your organisation **receives**?

As a reminder, letters sent by Second Class post and standard letters from businesses and organisations would no longer be delivered on Saturdays and may take an extra day to arrive compared to current delivery times.

CATI: READ OUT ANSWER CODES ONLY FOR FIRST STATEMENT, UNLESS NECESSARY TO REPEAT

CAWI: Please select one answer per type of post your organisation receives

Row Code	Row list	Scripting notes	Routing
1	**PIPE OPTIONS FROM A2**	**SHOW IF SELECTED AT A2=2-6,96**	

Column Code	Row list	Scripting notes	Routing
1	This would make no difference to my organisation		
2	This would be inconvenient, but not a big problem		
3	This would be a big inconvenience to my organisation		
4	This would have a substantial negative impact on my organisation and cause substantial difficulties – *if this happened, the service provided by Royal Mail would no longer meet my organisation's needs*		
97	Don't know		

Where 'big' negative impact in relation to receiving letters (Any C1=3 or 4)

OPEN

C2. You said that this would be a big inconvenience or would have a substantial negative impact on your organisation and cause substantial difficulties in relation to some of the letters you receive – why is this?

Please mention which type of letter post you are referring to within your answer.

CATI: RECORD ANSWER

CAWI: Please write your answer in the box below

[_____]

97	Don't know	**TICK BOX**

Base: All respondents who receive letters (S5=2-6, 96 OR S5A=1)

SINGLE RESPONSE PER ROW, GRID

C3. Which of the following is the most accurate statement regarding your business receiving letter post?

CATI: READ OUT

CAWI: Please select one answer

Fixed codes	Row list	Scripting notes	Routing
1	If the business receives post on a Saturday, it is opened the same day		
2	Post the organisation receives on a Saturday is not opened until Monday or later		
3	We never receive post on a Saturday		
4	I don't know if our organisation receives post on a Saturday		

Base: All who ever send letters (Any A3 = 2-6, 96)

GRID, SINGLE CODE, PIPE ANSWERS FROM A3

C4. How much of an impact would the proposed changes **[ADD HOVER OVER/ CATI READ OUT DEFINITION IF NECESSARY]** to Second Class post have in relation to the types of letter post that your organisation **sends**?

CATI: READ OUT ANSWER CODES ONLY FOR FIRST STATEMENT, UNLESS NECESSARY TO REPEAT

CAWI: Please select one answer per type of post your organisation sends

Row Code	Row list	Scripting notes	Routing

| | 1 | PIPE OPTIONS FROM A3 | SHOW IF SELECTED AT A3=2-6,96 | |

Fixed codes	Column list	Scripting notes	Routing
1	This would make no difference to my organisation		
2	This would be inconvenient, but not a big problem		
3	This would be a big inconvenience to my organisation		
4	This would have a substantial negative impact on my organisation and cause substantial difficulties– if this happened the service provided by Royal Mail would no longer meet my organisation's needs		
97	Don't know		

Where big negative impact in relation to sending specific letter types (Any C4=3 or 4)

OPEN

C4A. You said that this would be a big inconvenience or would have a substantial negative impact on your organisation and cause substantial difficulties in relation to some of the letter post you send – why is this?

Please mention which type of letter post you are referring to within your answer.

CATI:RECORD ANSWER

CAWI: Please write your answer in the box below

[_____]

| 97 | Don't know | **TICK BOX** |

Base: All who would be impacted by changes when sending post or don't know (ANY C4= 2, 3, 4, 97)

MULTI RESPONSE, **RANDOMISE**

C5. If all of the proposed changes **ADD HOVER OVER/ CATI READ OUT DEFINITION IF NECESSARY** were made, would your organisation do any of the following?

As a reminder, letters sent by Second Class post and standard letters from businesses would no longer be delivered on Saturdays and may take an extra day to arrive compared to current delivery times.

CATI: READ OUT IF NECESSARY

CAWI: Please select all that apply

Column Code	Row list	Scripting notes	Routing
1	Start sending some more of our letters First Class		
2	Start sending all of our letters First Class		
3	Start sending some more of or all of our letters signed for or tracked		
4	Use a service other than Royal Mail for some or all of our letter post		
5	Use more online/ digital alternatives, such as email, instant messaging, social media or online forms		
6	Use more methods of communication other than post or digital (e.g. in person or over the telephone) instead of some or all of our letter post		
7	Send things earlier than we would previously have needed to		
95	Other (please specify)	**FIX, OPEN TEXT BOX. CATI DO NOT READ OUT**	
97	Don't know	**EXCLUSIVE, FIX. CATI DO NOT READ OUT**	
96	We would not make any changes	**EXCLUSIVE, FIX AT TOP. CATI DO NOT READ OUT**	

Base: All respondents

SINGLE RESPONSE. RANDOMISE.

C7. Thinking about all your business needs, to what extent do you think the changes [**ADD HOVER OVER/ CATI READ OUT DEFINITION IF NECESSARY]** would have an impact on your organisation?

CAWI: Please select one answer

CATI: CATI: READ OUT

Column Code	Row list	Scripting notes	Routing
1	We wouldn't notice any difference		
2	We would notice the difference, but it would make no impact on the organisation		
3	A slight negative impact on the organisation		
4	A significant negative impact on the organisation		

5	A very significant negative impact on the organisation		
97	Don't know		

Base: CATI. MASK FOR PANEL

SINGLE RESPONSE

Z10. Finally, BMG may want to conduct some further research to follow up on some of the issues covered here in more depth. Would you be happy for BMG to contact you again in the next 6 months as part of any follow up research?

Fixed codes	Answer list	Scripting notes	Routing
1	Yes		
2	No	**EXCLUSIVE**	**SHOW CLOSING TEXT IF CHOSEN**

Base: If Z10= 1 (agree to recontact)

MULTIPLE RESPONSE

Z11. Thank you. Please enter your details below:

Fixed codes	Answer list	Scripting notes	Routing
1	Name	**OPEN RESPONSE**	
2	Email address	**OPEN RESPONSE**	
3	Contact number	**OPEN RESPONSE**	
98	I would prefer not to give these details	**EXCLUSIVE, FIX AT BOTTOM**	

CLOSING TEXT

You have reached the end of the survey. Thank you for taking the time to answer our questions. Your input is really appreciated.

Please **click next** to submit your responses.