Ofcom Residential Postal Tracker Technical Report Q1 2023 – Q4 2023

A. Preface

Ofcom is the regulator for the UK communications industries, with responsibilities across television, radio, video-on-demand, telecommunications, wireless and postal communications. Ofcom regularly carries out research into these markets to stay informed on new technology developments and the impact that they might have on the sectors they regulate.

Ofcom's Residential Postal Tracker is a continuous tracking study that measures opinion, usage and attitudes to postal services among UK adults. The Residential Postal Tracker begun in 2012 where interviewing was conducted using a purely face-to-face methodology. Between January 2016 and December 2019, data was collected using a combined methodological approach: face-to-face interviews conducted using random probability sampling and online interviews using quota sampling. The data from both methodologies were then combined and weighted to nationally representative proportions in terms of age, gender, ethnicity, country and socio-economic group (SEG), and then a further 'evaluative' weight was introduced to account for a 'positivity bias'.

From January 2020, Jigsaw Research Limited was commissioned to review and manage the study moving forward. After a thorough review in consultation with Ofcom, a small number of changes were made throughout the questionnaire to improve its readability for the participant and user of the research. Jigsaw Research Limited continued with a combined online and face-to-face methodological approach as per previous years however the decision was taken to adjust the quota and weighting scheme to better represent the UK moving forward.

Between March 2020 and December 2022, due to the Covid-19 pandemic, Ofcom made the decision to halt all face-to-face fieldwork. Datasets that cover this period have therefore focused on predominantly online only data. As of January 2023, the face-to-face element of the fieldwork was reintroduced. This dataset therefore is the first data to include a full year of both online and face-to-face data since Q1 2019 to Q4 2019.

A.1. July 2022 Survey Changes

In July 2022 a thorough review of the questionnaire took place. There were a number of objectives to reviewing the questionnaire structure:

- Ensure clearer distinction between Letter Post and Parcel Post
- Ensure clearer distinction between Receiving and Sending Post
- Expand on the ability to compare Royal Mail vs other Parcel Providers in the competitive section
- Understand awareness and usage of the Royal Mail app
- Understand importance of environmental initiatives
- Reduce survey length

This restructuring of the questionnaire means that many questions now have different question numbers compared to previous years. Within our reporting we have shown trended data when the context of the question has remain unchanged. When the context has changed, we've shown trended data for interest only and flagged that the trend break within the chart.

This restructuring period lasted through July 2022, as such fieldwork for Q3 2022 did not start until August 2022. To make up for this shortfall we conducted double the number of interviews within August to ensure robust sample sizes for Q3 2022 overall.

Subsequently it was observed that there were some differences in the data as a result of this change in methodology. Most notably the answers to G1 (claimed volume of post sent) were substantially different, beyond what could reasonably be expected. We therefore advise caution when comparing data to periods prior to July 2022.

A.2. Q1 2023 – Q4 2023 Data Table Summary

The data tables published includes 6,169 users of the postal service who participated in the Residential Postal Tracker survey between January 2023 – December 2023. Results were then weighted to correct for over-representation of devolved nations and urbanity within nation. We also applied weights for age, gender, working status and government region to ensure we created a representative UK sample.

Details of the sample design, research methodologies and weighting procedures are outlined in the following pages. A note on statistical reliability is also included.

B. Sample Design

B.1. Online Interviewing

Jigsaw Research adopted a quota sample approach to online interviewing to ensure that the sample was representative of UK adults. Due to the continuous nature of the research, monthly targets are imposed to ensure a representative spread of interviews throughout the quarter. The sample frame was developed at a UK level covering the following key subgroups:

- Gender
- Age (16-24, 25-44, 45-64, 65-74, 75+)
- Socio-economic group (AB/C1/C2/DE)
- Gov Region

Additional targets were applied for urbanity (Urban, Rural, Remote Rural) within Northern Ireland, Wales and Scotland but these were applied on a 'best efforts' basis as they are not as easily targetable through online panel sample.

Jigsaw Research also applied an additional target for Highlands and Islands of Scotland, again this was applied on a 'best efforts' basis.

	Monthly target	Quarterly target
Male	196	588
Female	204	612
16 – 24 year olds	54	162
25-44 year olds	129	388
45-64 year olds	127	382
65-74 year olds	49	148
75+	40	121
AB	88	264
C1	124	372
C2	84	252
DE	104	312
North East	22	67
North West	22	67
Yorks/Humberside	22	67
East Mids	22	67
West Mids	22	67
East Anglia/East of England	22	67
London	22	67
South East	22	67
South West	22	67
Northern Ireland – urban	22	67
Northern Ireland – rural	14	43
Northern Ireland – remote rural	17	50
Wales – urban	22	67
Wales – rural	22	67
Wales – remote rural	22	67
Scotland – urban	22	67
Scotland – Rural	22	67

Scotland - remote rural	22	67
Highlands & Islands of Scotland	13	39

B.2. Face to Face Interviewing[1]

From January 2023, Jigsaw Research adopted a random location interviewing (RLI) approach to face to face interviewing alongside our online interviews. A representative UK sample frame was developed separately for each of the four nations (England, Scotland, Wales, Northern Ireland) covering the following key subgroups - age (16-24/25-44/45-64/65-74/75+), gender, socio-economic group (AB/C1/C2/DE) and government region.

	Quarterly target
Male	126
Female	126
16 – 24 year olds	34
25-44 year olds	83
45-64 year olds	78
65-74 year olds	31
75+	26
AB	52
C1	77
C2	55
DE	68
North East	18
North West	18
Yorks/Humberside	18
East Mids	18
West Mids	18
East Anglia/East of England	18
London	18
South East	18
South West	18
Scotland	30
Wales	30
Northern Ireland	30

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[1] Face to Face interviewing was paused due to the Covid-19 pandemic and restarted from January 2023.

C. Data Quality

Upon review of existing data prior to 2020, Jigsaw Research in combination with Ofcom implemented an additional data quality process (beyond survey speed checks and verbatim analysis) to ensure that participants had provided considered responses to the survey.

Questions of particular focus included:

- G1 – The volume of post sent
- H1/I2 – The amount spent on sending post
- E1 – The volume of post received
- H3 and H4 – The price of a 1st Class or 2nd Class stamp

Upon review of data from these questions we developed rules that would identify participants who provided non-sensical or extreme answers. Namely these rules are:

- Providing too high a spend for no post being sent (spent over £20 in the last month but have not sent any post)
- Providing too low a spend for the amount of post being sent (spent under £1 but sent over 21 pieces of post, spent £1-£2 but sent over 31 pieces of post, spent £2-£4 but sent over 41 pieces of post, spent £4-£6 but sent over 51 pieces of post, spent £6-£40 but sent over 101 pieces of post, spent £40-£50 but sent over 200 pieces of post)
- Received more than 200 pieces of post in the last week
- Provided a 1st class price less than a 2nd class price AND provided an outlier answer of over £5 for either 1st or 2nd class

This set of rules removed 1.5% of the total data provided to date *(roughly c.20 people per quarter of data)*. These rules have now been applied to all historic data and will be actioned for future quarters of data.

D. Weighting

At the analysis stage, data is rolled up into 4 quarters of the year. Both online and offline (face-to-face) methodologies are combined into one dataset. We then conduct weighting to correct for skews in regions and where we have set specific quota targets, aligning the data to the known UK profile. With a combined online and offline dataset we were able to develop a detailed interlocked weighting scheme with interlocked gender and age within nation.

D.1. Demographic weights

The data was weighted within each nation by age, gender, urbanity and working status. We also include regional weights to correct for overrepresentation of the nations within the UK sample. Rim weights were applied using targets from the 2011 Census, UK Geographics measure of Urbanity and the Labour Force Survey.

The initial unweighted sample and the weighted sample profiles are illustrated below:

Category	England		NI		Wales		Scotland	
	Unweighted	Weighted	Unweighted	Weighted	Unweighted	Weighted	Unweighted	Weighted
Male	48%	49%	49%	49%	47%	49%	48%	48%
Female	51%	51%	51%	51%	53%	51%	52%	51%
Gender not listed or specified	<1%	<1%	-	-	-	-	1%	1%
16-24	13%	13%	13%	14%	13%	13%	12%	13%
25-44	32%	33%	33%	33%	30%	30%	31%	32%
45-64	31%	32%	33%	33%	31%	33%	32%	33%
65-74	13%	12%	13%	11%	15%	14%	15%	13%
75+	11%	10%	8%	9%	11%	11%	9%	9%
Urban	90%	87%	44%	69%	42%	76%	40%	83%
Rural	10%	13%	56%	31%	58%	24%	60%	17%
Working	54%	60%	60%	60%	51%	60%	56%	60%
Not working	44%	39%	39%	39%	48%	39%	43%	39%

Category	UK	
	Unweighted	Weighted
North East	6%	4%

North West	6%	11%
Yorkshire/Humberside	6%	8%
East Midlands	6%	7%
West Midlands	6%	9%
East Anglia/ East of England	6%	9%
London / Greater London	6%	13%
South East	6%	14%
South West	6%	9%
Scotland	18%	8%
Wales	16%	5%
Northern Ireland	13%	3%

E. Statistical reliability and significance

E.1. Effective sample size

This section details the variation between the sample results and the "true" values, or the findings that would have been obtained with a census approach. 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 (ESS) rather than actual sample size to judge the accuracy of results.

The following table compares ESS and actual samples for some of the main analysis groups:

Category	Sub-group	Actual online interviews achieved	Effective sample size (ESS)
Nation	England	3299	2897
	Scotland	1125	505
	Wales	970	529
	Northern Ireland	775	510
Gender	Male	2978	1838
	Female	3178	1945
Age	16-24	798	527
	25-34	807	519
	35-44	1140	686
	45-54	772	481
	55-64	1175	724
	65-74	844	482
	75+	633	377
SEG	AB	1451	715
	C1	1853	1170
	C2	1225	840
	DE	1235	1070

E.2. Confidence interval

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% ±
3,793 (Total)	0.95	1.27	1.46	1.56	1.59
2,897 (England)	1.09	1.46	1.67	1.78	1.82
1,838 (Male)	1.37	1.83	2.10	2.24	2.29
505 (Scotland)	2.62	3.49	4.00	4.27	4.36

For example, if 30% or 70% of a sample of 3,793 gives a particular answer, the chances are 95 in 100 that the "true" value will fall within the range of +/- 1.46 percentage points from the sample results.

E.3. Significant differences

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 have to 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 sizes being compared	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
1,838 vs 1,945 Male vs Female	2.00%	2.62%	2.97%	3.15%	3.19%
527 vs 377 16-24 vs 75+	4.27%	5.51%	6.20%	6.55%	6.61%

For example, comparing a score of 12% for Males and 15% for Females, the scores will need to be at least 2.00% different (using the table) to indicate a significant difference.