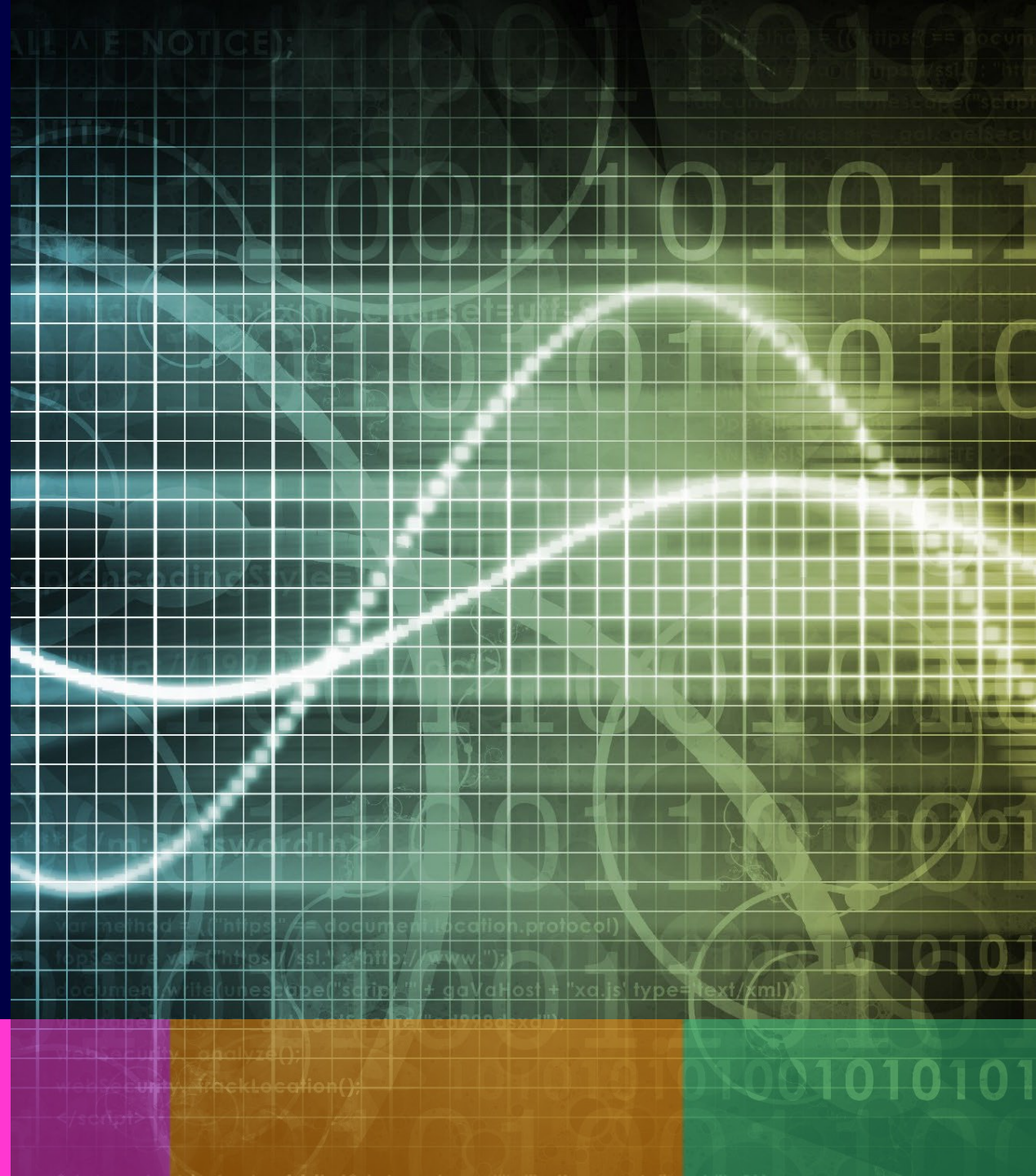




Measuring user experience of parcel delivery to residential addresses

Fieldwork January/July 2024



Objectives & Methodology

This study has been conducted over four waves to date - two waves in 2023 (Wave 1: January 23 and Wave 2: July / August 23*) and two waves in 2024 (Wave 3: January /February 24 and Wave 4: July 24). ** Data collected from the two waves within each calendar year have been combined to provide annual statistics that are based on large, reliable sample sizes. Basing annual statistics on data collected at two separate points within the year reduces the risk of seasonal variations in service impacting on the data.

An online survey was conducted by Yonder Consulting and completed by **4,048 people** aged 16+. The sample was comprised of UK residents who had experience of UK delivery companies in the six months prior to research. All data was weighted to align with the UK population profile on age and gender, region, ethnicity, and social grade to ensure alignment with known proportions occurring naturally within the UK population.

The primary objective of the research was to understand the experience of residential recipients when receiving parcel deliveries. Specifically, Ofcom are seeking track the following over time:

- Measure the reported quality of service received from different delivery companies;
- Measure the reported satisfaction and experience with different delivery companies when making a complaint (or customer contact)***;
- Understand the experience of recipients with impacting/limiting conditions, and the reported quality of service they receive from delivery companies, and the experiences of recipients with impacting/limiting conditions when sending parcels.
- Compare any differences in experience of those living in urban/rural areas.
- Further details on how the research defined recipients with impacting/limiting conditions and those in urban and rural areas and are set out in Appendix 2.

*NB – the large majority (97%) of the Wave Two interviews were completed between 24-27 July. The remaining interviews were conducted on 21 August to fill sample quotas.

** Royal Mail services were affected by strikes in the latter half of 2022 and the first half of 2023 which may have had an impact on the findings.

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

Summary of key findings

1

The proportion experiencing delivery issues with any company in 2024 (67%) remains similar to 2023 (68%). However, the proportion experiencing delays or failure to deliver has fallen significantly (35% vs. 42% in 2023), while the proportion of those who experienced an issue contacting companies about delays has also fallen year on year (19% vs. 23% in 2023).

2

The average overall satisfaction with delivery companies in 2024 is consistent with last year's findings, at 78%. While the majority (78%) would like to see at least one service improvement across delivery services, this has significantly dropped compared to 2023 (83%).

3

Looking at the average satisfaction with the complaints process across delivery companies, just under half (49%) are satisfied, however this varies considerably between delivery company from 56% to 32%.

4

Those with impacting/limiting conditions continue to be disproportionately affected by delivery issues, and to have contacted delivery companies regarding courier/transit issues.

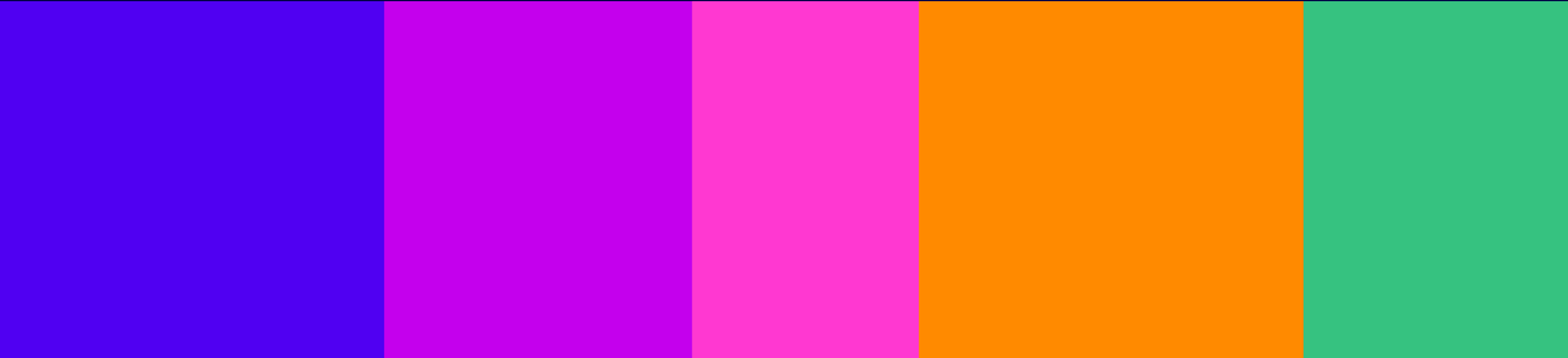
Delivery issues have been grouped for analysis as follows:

NET*: Not delivered on time as expected	NET: Accessibility issues	NET: Courier/transit issues	NET: Lack of information / options
Parcel was not delivered	Parcel collection point was not convenient	Parcel was damaged	Inconvenient options for delivery
Parcel delivery was delayed	I was not given sufficient time to answer the door	Did not attempt to deliver in person (e.g. left 'you were not in' card even when I was at home to collect parcel)	Incorrect or insufficient tracking information
	Parcel left in inaccessible place	Parcel left in inappropriate location	Unable to rearrange the delivery
	I was required to sign a form I could not read	Delivery person was rude or unhelpful	
	The process for selecting a timeslot was not accessible to me	Delivery person did not knock loudly enough or ring the doorbell	
	The process for requesting special delivery instructions was not accessible to me	Parcel was not left in my nominated safe space	
	Parcel delivered to a location that I could not access (e.g. local shop or post office)		

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

Section 1

Experience of delivery issues



On average, just over a third (34%) of parcel recipients have experienced a delivery issue with their delivery company in 2024

Experience of issues (Top 10) – by company (2024 data)

Significantly higher/lower than the average at 95% confidence

	DHL	Parcelforce	DPD	UPS	FedEx	Royal Mail	Yodel	DX Delivery	TNT Express	Amazon	Evri	NET: Any company
NET: Any issues experienced	27%	27%	27%	29%	32%	35%	36%	37%	37%	37%	44%	67%
Parcel delivery was delayed	4%	6%	4%	4%	4%	13%	8%	7%	6%	7%	13%	27%
Parcel left in inappropriate location	4%	3%	4%	3%	3%	5%	6%	5%	3%	11%	12%	23%
Delivery person did not knock loudly enough or ring the doorbell	4%	4%	5%	4%	5%	5%	6%	4%	6%	10%	9%	20%
I was not given sufficient time to answer the door	5%	4%	5%	4%	4%	5%	7%	3%	7%	10%	8%	19%
Did not attempt to deliver in person*	3%	4%	3%	3%	3%	6%	5%	5%	4%	4%	7%	17%
Parcel was not delivered	2%	2%	3%	3%	3%	6%	3%	5%	4%	4%	7%	17%
Incorrect or insufficient tracking information	3%	3%	3%	4%	4%	6%	5%	5%	4%	3%	6%	15%
Parcel was not left in my nominated safe space	2%	3%	3%	3%	3%	3%	4%	2%	3%	6%	6%	14%
Parcel was damaged	2%	2%	3%	2%	3%	4%	4%	1%	3%	5%	7%	15%
The process for selecting a timeslot was not accessible to me	3%	4%	3%	4%	5%	4%	4%	4%	4%	3%	4%	9%

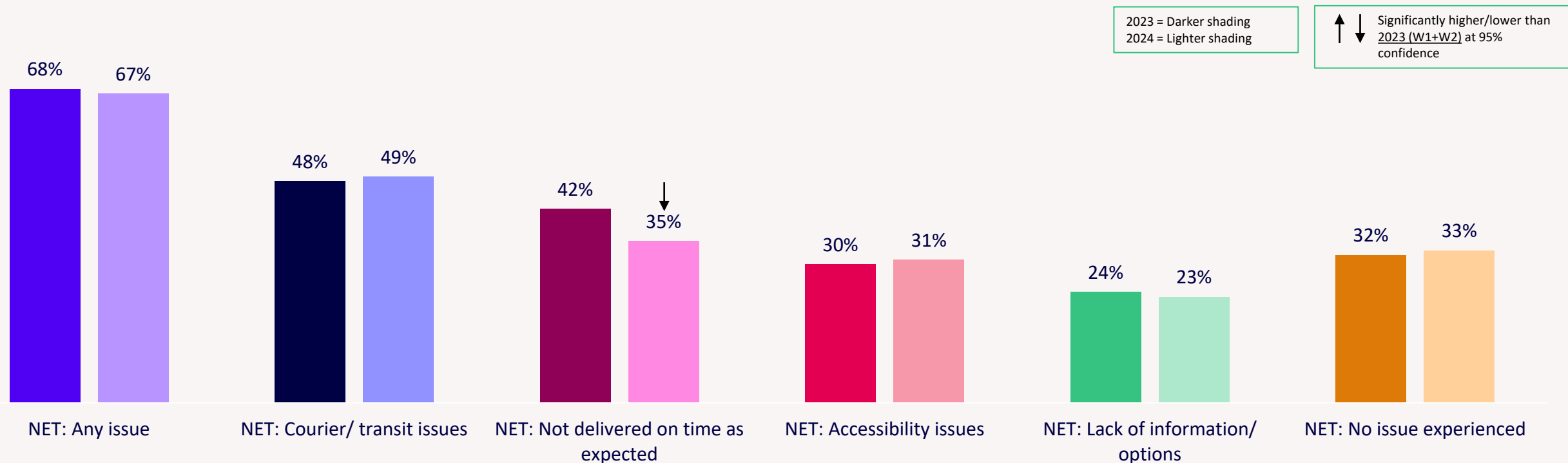
Source: Ofcom Quality of postal services survey Jan/Jul-24

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

Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2024: Total (4048), Royal Mail (3756), DHL (1709), DPD (2762), FedEx (790), Evri (3189), Parcelforce (1690), TNT Express (386), UPS (1031), Yodel (2057), Amazon (3593), DX Delivery Services (450), Average across companies (4048). The average across companies was calculated by adding up all scores and dividing by the number of delivery companies.. * Full text: Did not attempt to deliver in person (e.g. left 'you were not in' card even when I was at home to collect parcel). "NET: Any company" shows the % of respondents who had received a delivery that had experienced the issue with any delivery company.

In 2024, two thirds (67%) continued to report having experience an issue, however a significantly lower proportion reported that parcels had not been delivered on time compared to 2023

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



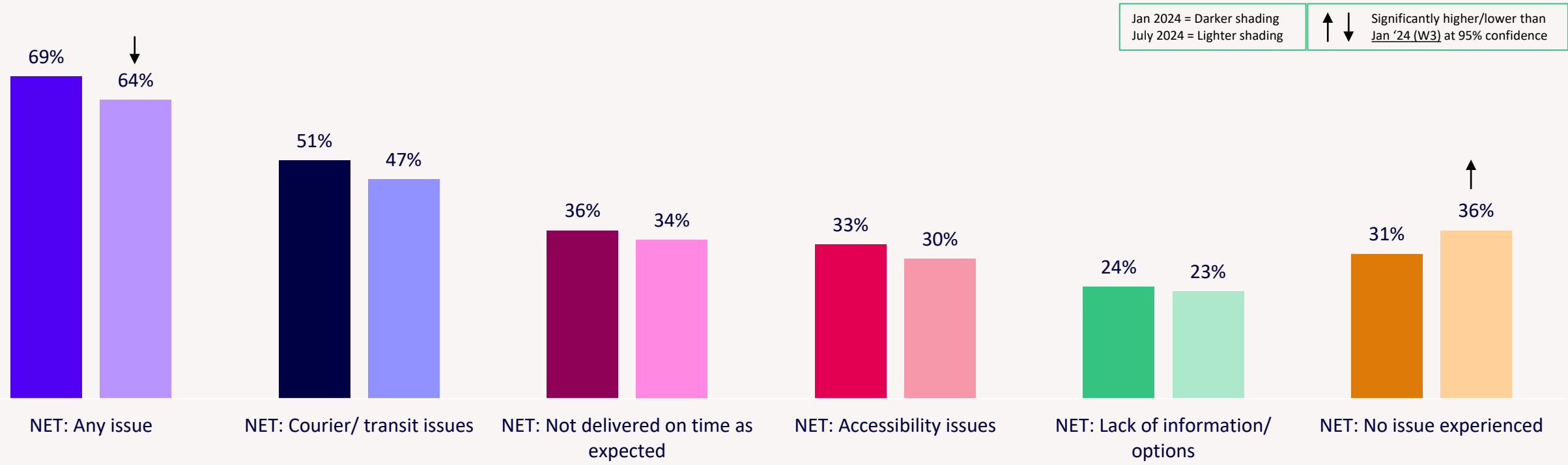
Source: Ofcom Quality of postal services survey Jan-24/Jul-24

Q3. Delivery issues - all experienced: Which, if any, of the following issues have you experienced with these delivery companies in the last 6 months? Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/JUL 2024: Total (2017/2031) Annual total 2023/2024 (4107/4048)

In 2024, survey respondents were less likely to report issues with delivery services in July, particularly with courier/transit issues, and accessibility issues. This may be indicative of seasonal fluctuation



Experience of delivery issues – NET Any delivery company (Jan vs July 2024 data)



Jan 2024 = Darker shading
 July 2024 = Lighter shading
 ↑ ↓ Significantly higher/lower than Jan '24 (W3) at 95% confidence

Source: Ofcom Quality of postal services survey Jan-24/Jul-24

Q3. Delivery issues - all experienced: Which, if any, of the following issues have you experienced with these delivery companies in the last 6 months? Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/JUL 2024: Total (2017/2031) Annual total 2023/2024 (4107/4048)

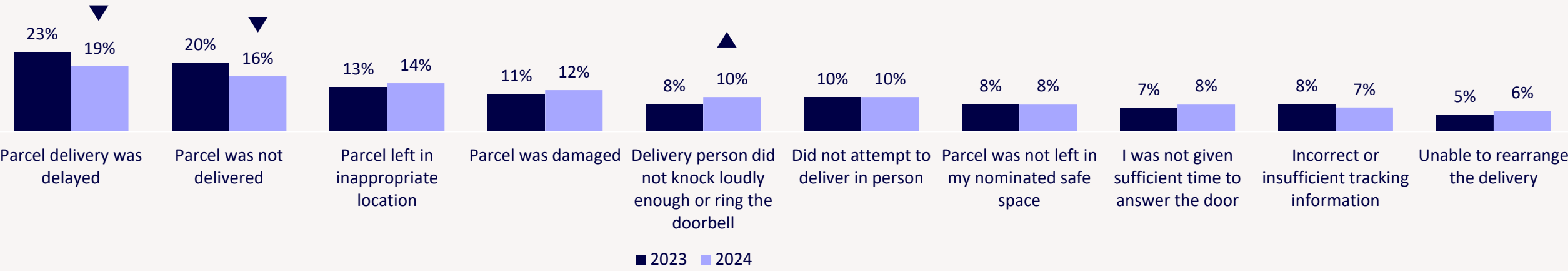
The most common issues that respondents contacted any delivery company about were parcels not being delivered or deliveries being delayed, however delivery companies were contacted significantly less for these reasons in 2024 compared to 2023



2023 = Darker shading
2024 = Lighter shading

▲▼ Significantly higher/lower than 2023 at 95% confidence

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



Source: Ofcom Quality of postal services survey Jan/Jul-24

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

Q4. Base: All respondents who have experienced an issue with [delivery company] in the past 6 months JAN/JUL 2023/ JAN/JULY 2024: Total (2799/2706)

The proportion of those experiencing delivery issues is similar across the nations and regions, although higher in London, with the highest levels of significant variance being with accessibility issues and parcels not being delivered on time

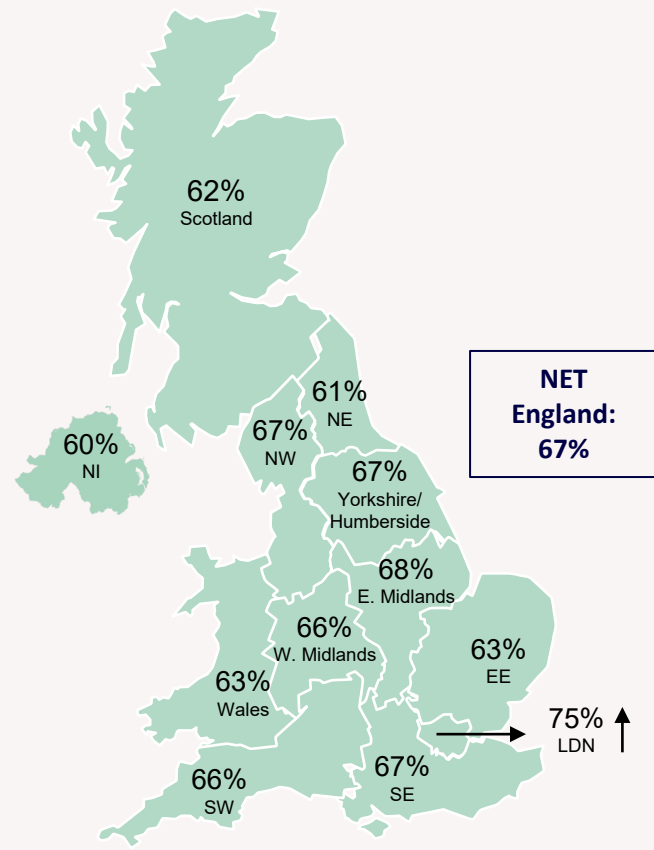
Experience of delivery issues – NET Any delivery company (2024 data) / Nation and Region

NET: Any issue: 67%

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

Those living in **Urban (66%)** areas and **Rural (66%)** areas have similar experiences of issues overall

However, those living in **Urban areas are significantly more likely to experience a lack of information (23%)** than those living in **Rural areas (18%)**



NET: Courier / transit issues (49%):
England 49%
Scotland 47%
Wales 46%
Northern Ireland 44%

NET: Lack of information (23%):
Scotland 25%
England 23%
Northern Ireland 23%
Wales 18%

NET: No issue experienced (33%):
Northern Ireland 40%
Scotland 38%
Wales 37%
England 33%

NET: Accessibility (31%):
England 32% ↑
Northern Ireland 29%
Scotland 23% ↓
Wales 23% ↓

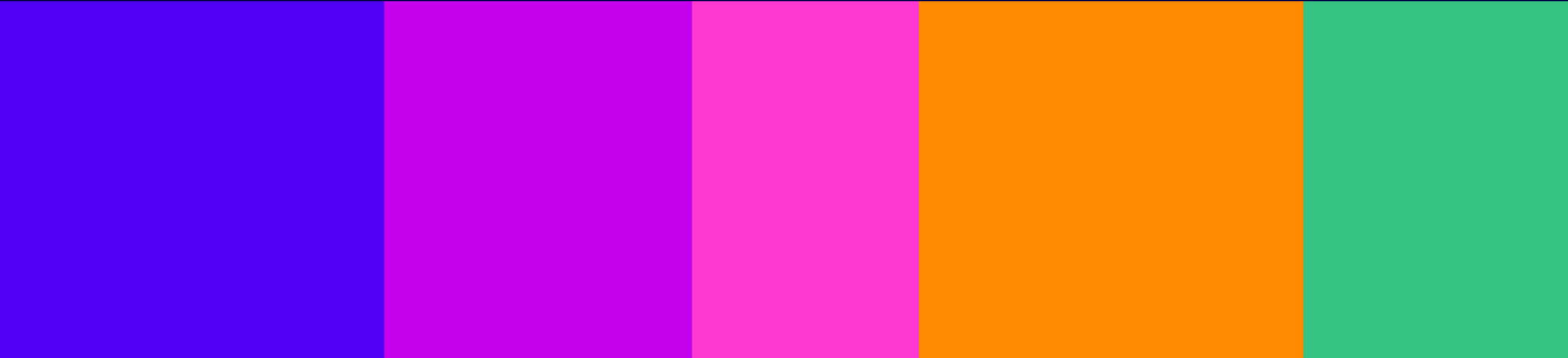
NET: Not delivered on time as expected (35%):
England 35% ↑
Scotland 32%
Wales 30%
Northern Ireland 26% ↓

Source: Ofcom Quality of postal services survey Jan-24/Jul-24

Q3. Delivery issues - all experienced: Which, if any, of the following issues have you experienced with these delivery companies in the last 6 months? Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/Jul 2024: Q2. Base: All respondents who have used [delivery company] in the past 6 months JAN/Jul 2024: Total (4048), North East (156), North West (450), Yorkshire and the Humber (338), West Midlands (353), East Midlands (320), East of England (406), London (508), South East (497), South West (369), Scotland (327), Wales (195), Northern Ireland (129), NET: England (3397), Urban (3429), Rural (461)

Section 2

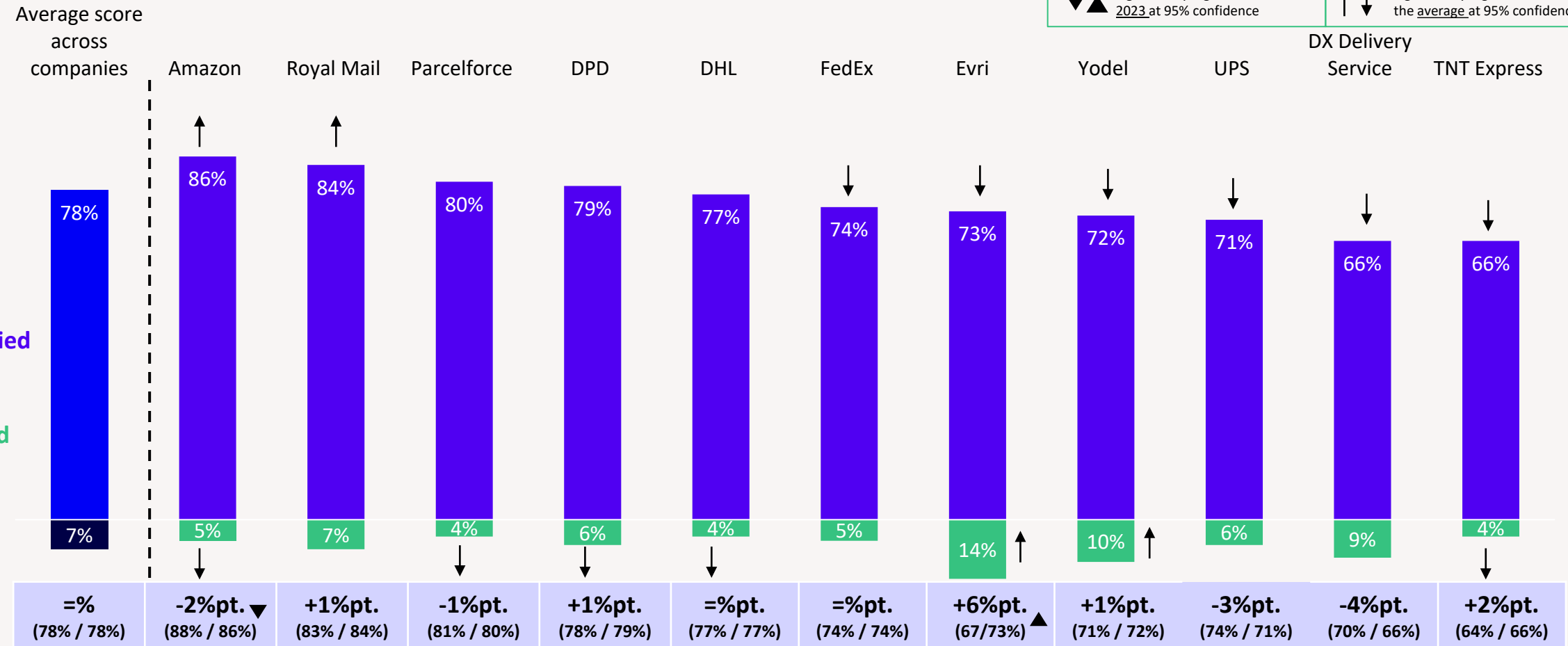
Satisfaction with delivery companies



On average across delivery companies, 78% of recipients were satisfied with the delivery experience overall – in line with last year

Satisfaction and dissatisfaction with delivery companies – Total (2024 data)

▼▲ Significantly higher/lower than 2023 at 95% confidence
 ↑↓ Significantly higher/lower than the average at 95% confidence



Source: Ofcom Quality of postal services survey Jan/Jul-24

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

Q2. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2024: Total (4048), Royal Mail (3756), DHL (1709), DPD (2762), FedEx (790), Evri (3189), Parcelforce (1690),

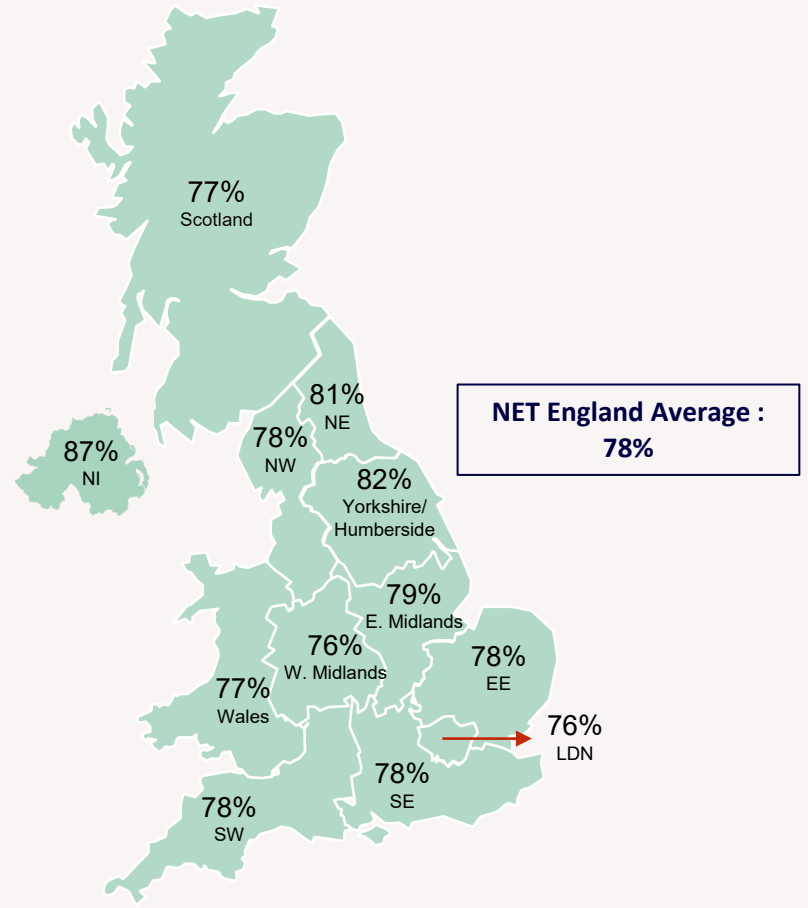
TNT Express (386), UPS (1031), Yodel (2057), Amazon (3593), DX Delivery Services (450), All company average (4048).

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

On average, the proportion of those satisfied with delivery companies is similar across the nations and regions

Satisfaction and dissatisfaction with delivery companies – **Average across delivery company (2024 data) / Nation and Region**

Average Satisfied: 78%



On average, there were no **significant** differences in satisfaction for those living in **Urban (79%)** and **Rural (76%)** areas and no significant differences in dissatisfaction for those living in **Urban (7%)** and **Rural (7%)** areas

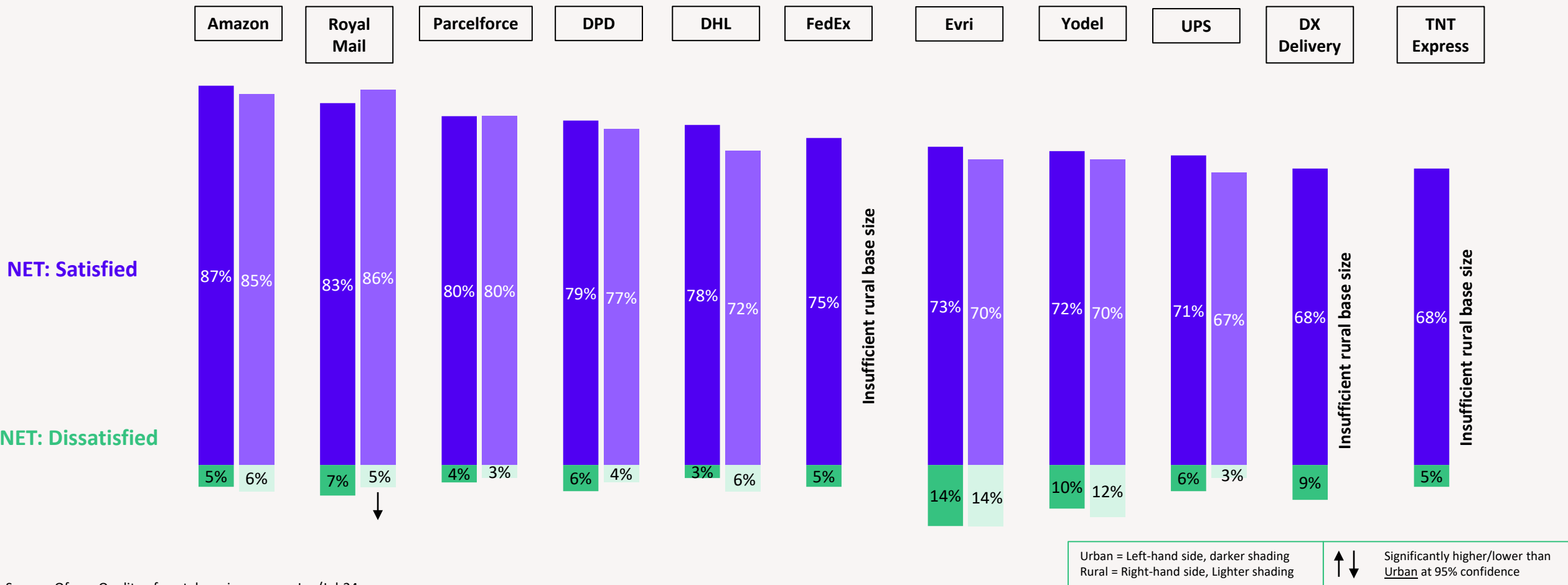
Source: Ofcom Quality of postal services survey Jan-24/Jul-24

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

Q2. Base: All respondents who have used [delivery company] in the past 6 months JAN/Jul 2024: Total (4048), North East (156), North West (450), Yorkshire and the Humber (338), West Midlands (353), East Midlands (320), East of England (460), London (508), South East (497), South West (369), Scotland (327), Wales (195), Northern Ireland (129), NET: England (3397), Urban (3429), Rural (461). The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

In 2024, satisfaction with delivery services was similar among urban and rural respondents

Satisfaction and dissatisfaction with delivery companies – Urban vs Rural (2024 data)



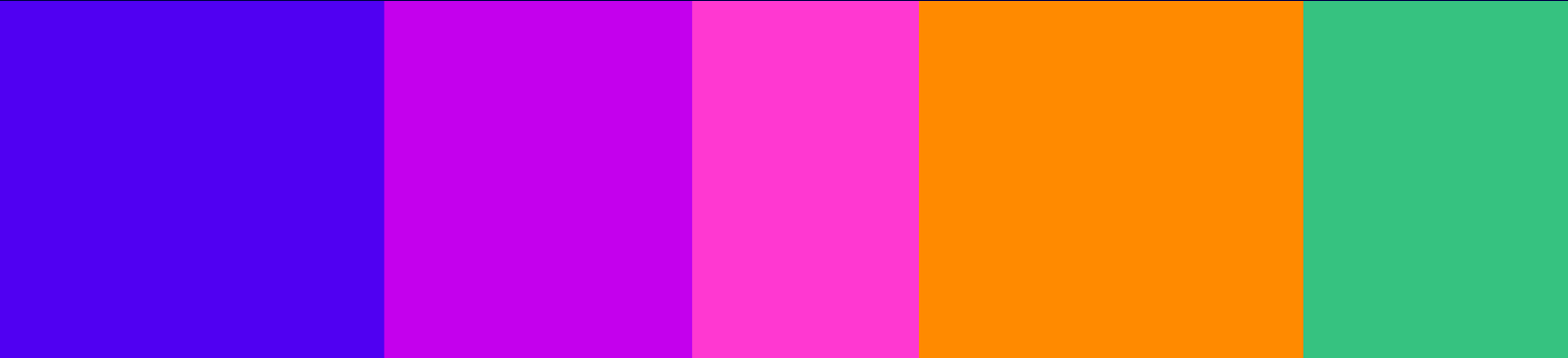
Source: Ofcom Quality of postal services survey Jan/Jul-24

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

Q2. Base: All respondents who have used [delivery company] in the past 6 months JAN/JUL 2024: Total (3429 Urban, 461 Rural), Royal Mail (3181 Urban, 437 Rural), DHL (1424 Urban, 199 Rural), DPD (2325 Urban, 319 Rural), FedEx (649 Urban), Evri (2695 Urban, 381 Rural), Parcelforce (1416 Urban, 219 Rural), TNT Express (309 Urban), UPS (864 Urban, 1056 Urban), Yodel (1736 Urban, 249 Rural), Amazon (3053 Urban, 399 Rural), DX Delivery Services (357 Urban) **Combined base sizes below 100 excluded***

Section 3

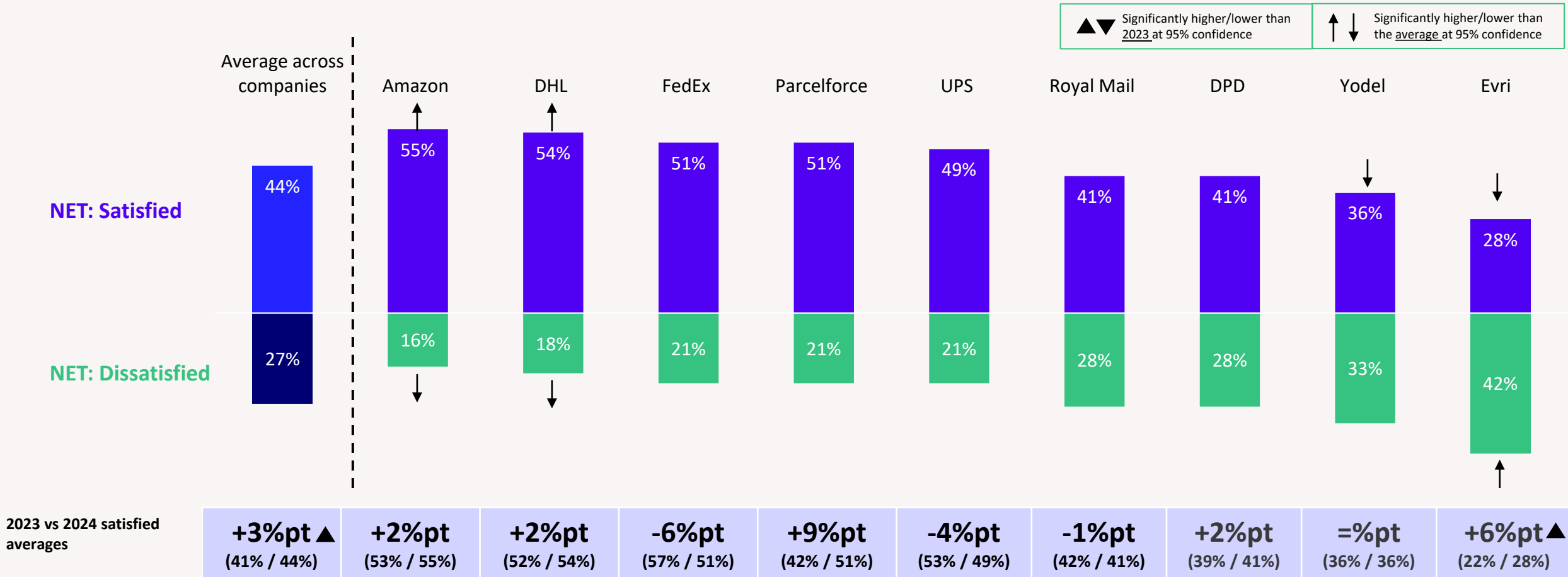
Satisfaction with the contact process



On average, 44% of those who contacted a delivery company to discuss an issue were satisfied with the experience, slightly higher than in 2023.



Satisfaction and dissatisfaction with contact process - **Contacting the delivery company to discuss an issue (2024 data)**



Source: Ofcom Quality of postal services survey Jan/July-24

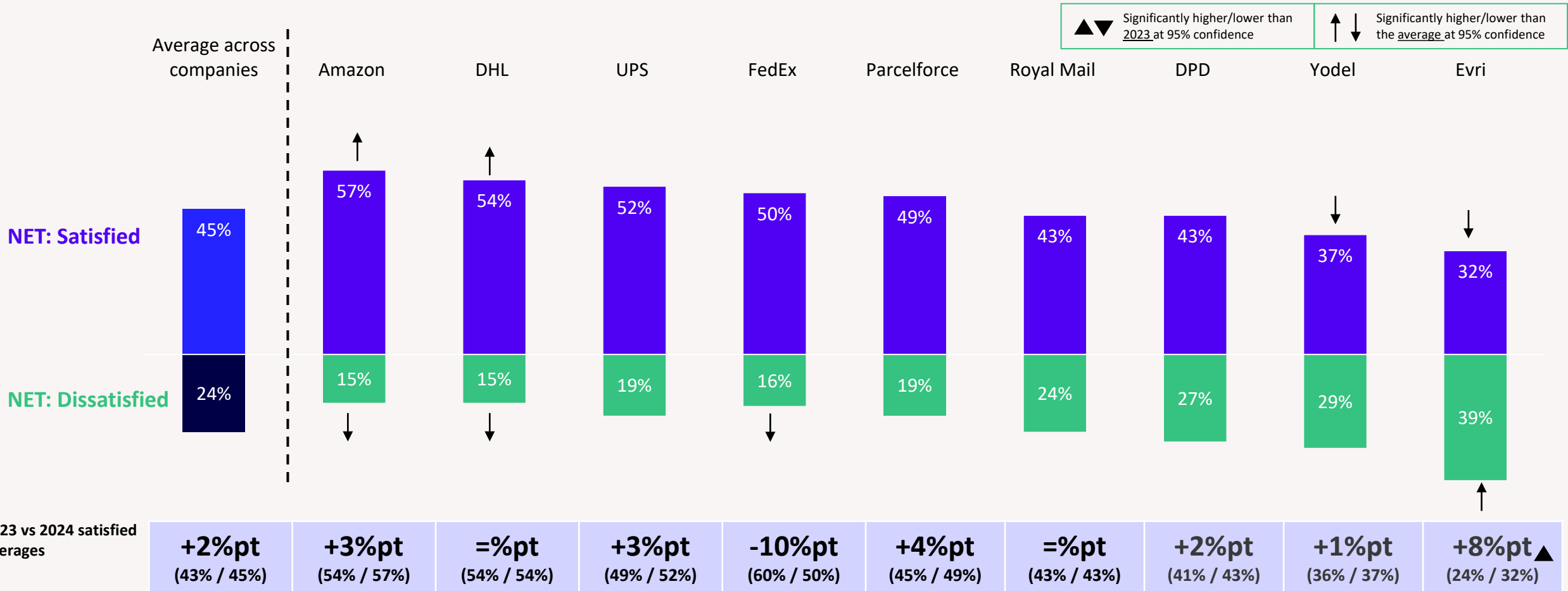
Q6. Thinking about the last time you contacted [delivery company], how satisfied were you with the following aspects of the contact process?

Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2024: Total (1660), Royal Mail (580), DHL (226), DPD (346), FedEx (139), Evri (659), Parcelforce (207), UPS (142), Yodel (344), Amazon (619). The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

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

On average, 45% were satisfied with how their contact or complaint was handled by staff, a similar proportion to 2023 (43%).

Satisfaction and dissatisfaction with contact process - **How your contact or complaint was handled by staff at the delivery company (2024 data)**



Source: Ofcom Quality of postal services survey Jan/July-24

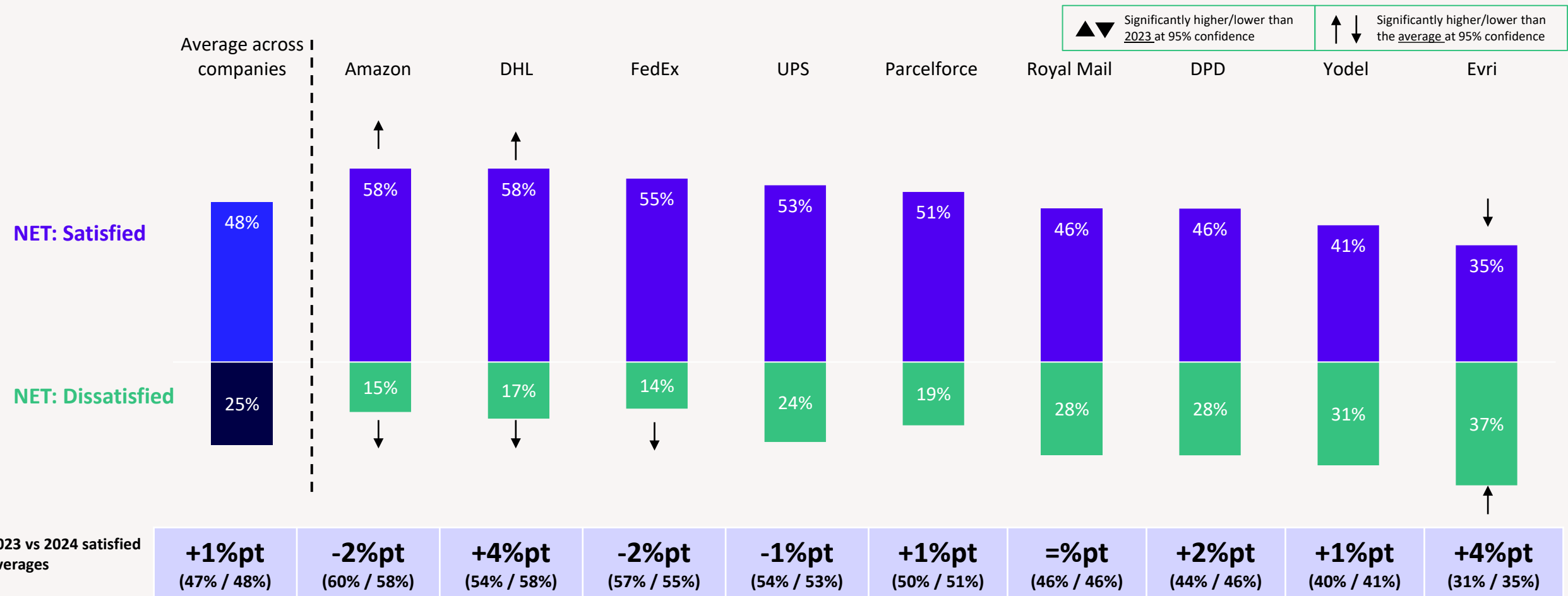
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Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2024: Total (1660), Royal Mail (580), DHL (226), DPD (346), FedEx (139), Evri (659), Parcelforce (207), UPS (142), Yodel (344), Amazon (619). The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

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

On average, 48% of those contacting each delivery company were satisfied that their issue was resolved, in line with last year

Satisfaction and dissatisfaction with contact process - **That your issue was resolved (2024 data)**



Source: Ofcom Quality of postal services survey Jan/July-24

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

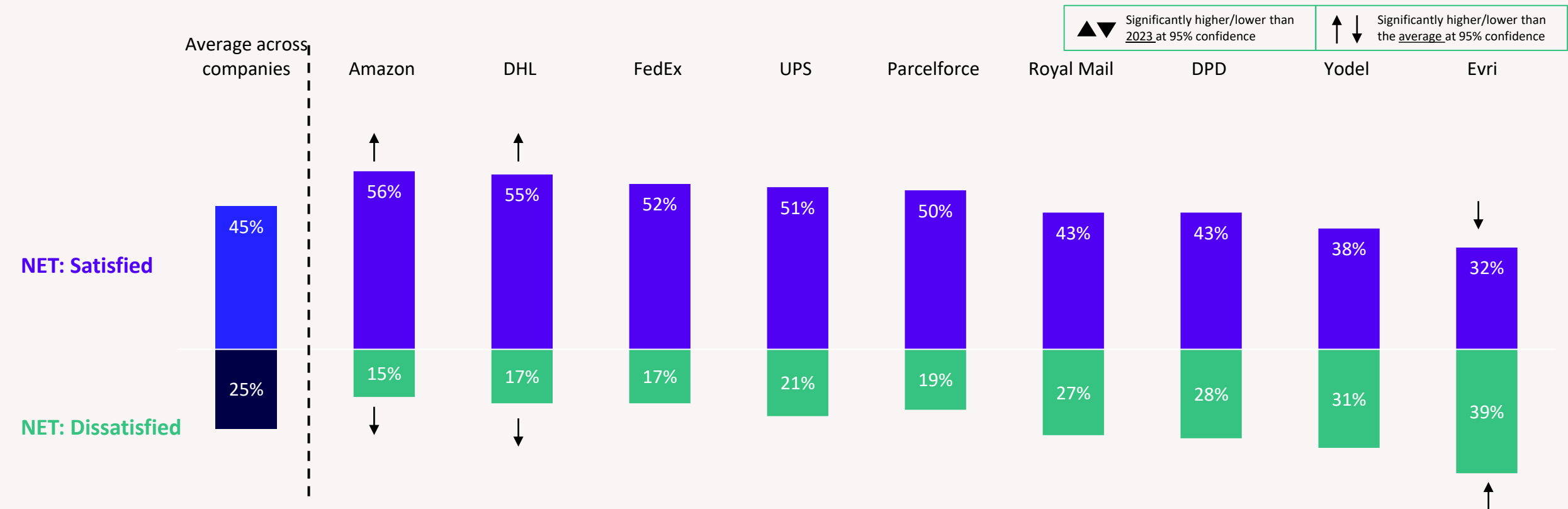
Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2024: Total (1660), Royal Mail (580), DHL (226), DPD (346), FedEx (139), Evri (659), Parcelforce (207), UPS (142), Yodel (344), Amazon (619).

The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample. Results for delivery companies with sample sizes of less than 100 have not been shown

Across the three elements of the contact process, on average, just under half (45%) of those who made contact were satisfied – in line with 2023



Satisfaction and dissatisfaction with contact process – **Average across elements of the contact process (2024 data)**



2023 vs 2024 satisfied averages	Amazon	DHL	FedEx	UPS	Parcelforce	Royal Mail	DPD	Yodel	Evri
+1%pt. (44% / 45%)	=%pt. (56% / 56%)	+1%pt. (54% / 55%)	-6%pt.▼ (58% / 52%)	-1%pt. (52% / 51%)	+4%pt. (46% / 50%)	-1%pt. (44% / 43%)	+1%pt. (42% / 43%)	+1%pt. (37% / 38%)	+6%pt.▲ (26% / 32%)

Source: Ofcom Quality of postal services survey Jan/July-24

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

Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2024: Total (1660), Royal Mail (580), DHL (226), DPD (346), FedEx (139), Evri (659), Parcelforce (207), UPS (142), Yodel (344), Amazon (619). The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample.

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

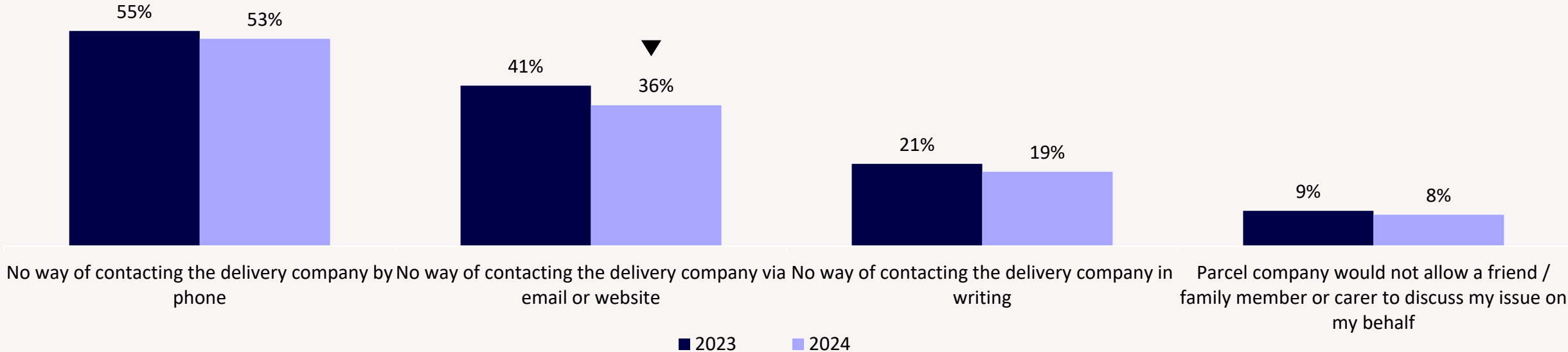
Among those dissatisfied with the process of contacting the delivery company, over half (53%) said that this was because there was no way to contact the company by telephone



Dissatisfaction with contact – NET: Any company (2024 data)

2023 = Darker shading
2024 = Lighter shading

▲▼ Significantly higher/lower than 2023 at 95% confidence



Source: Ofcom Quality of postal services survey Jan-24/ Jul-24

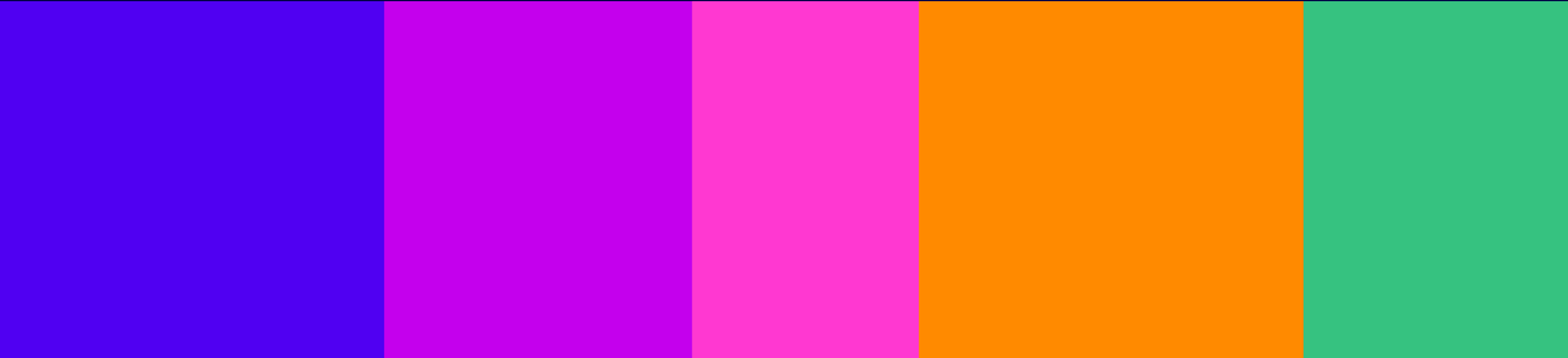
Q7. Difficulty in contact: Why were you dissatisfied with the process of contacting [delivery company]?

Q7. Base: All respondents who have contacted [delivery company] and were dissatisfied JAN 2024/ JUL 2024: Net Any (662)

Reasons mentioned by less than 5% have not been shown

Section 4

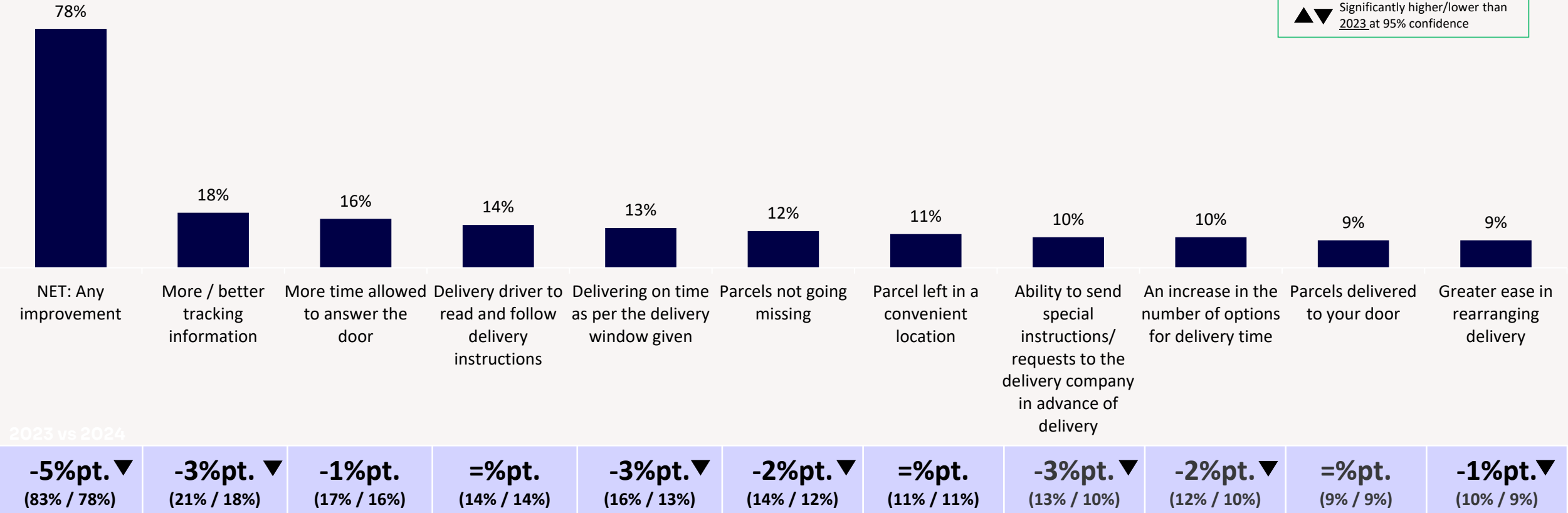
Suggested service improvements



Just under eight in ten (78%) parcel recipients would like to see at least one service improvement – a significant reduction compared to 2023 (83%)

Suggested improvements (Top 10) – NET: Any company (2024 data)

▲ ▼ Significantly higher/lower than 2023 at 95% confidence



Source: Ofcom Quality of postal services survey Jan/Jul-24

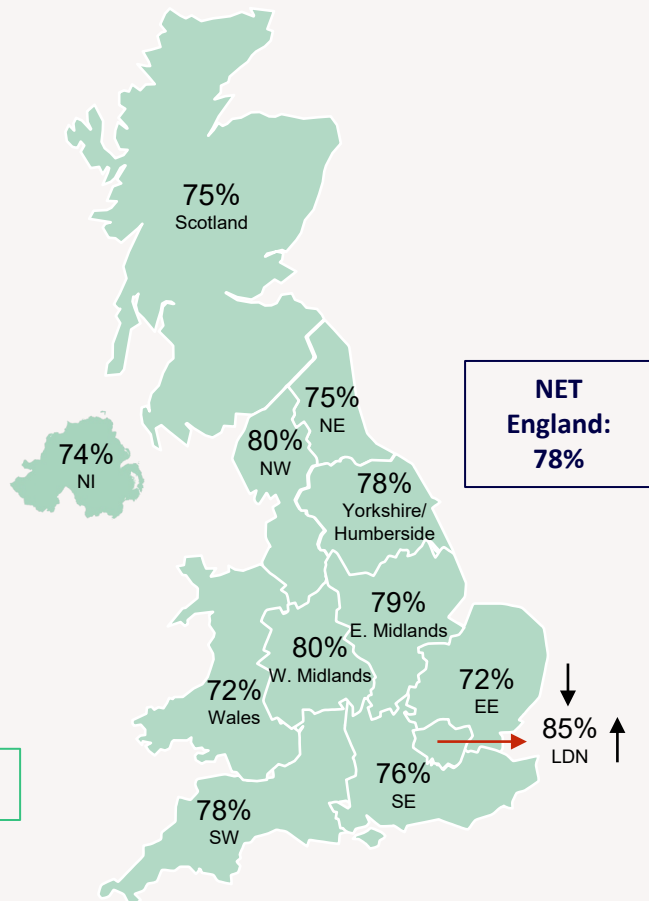
Q8. QoS: Of the following areas, in which would you most like to see improvement on the part of the delivery companies that have delivered to you in the last 6 months

Q8. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2024: (4048)

Those living in England and particularly London were more likely to say they wish to see improvements across delivery services

Suggested improvements – NET Any delivery company (2024 data) / Region

NET: Any improvement: 78%



Those living in **Urban** areas are **significantly more likely to want to see improvements across delivery services (78%)** than those living in **Rural** areas (**72%**)

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

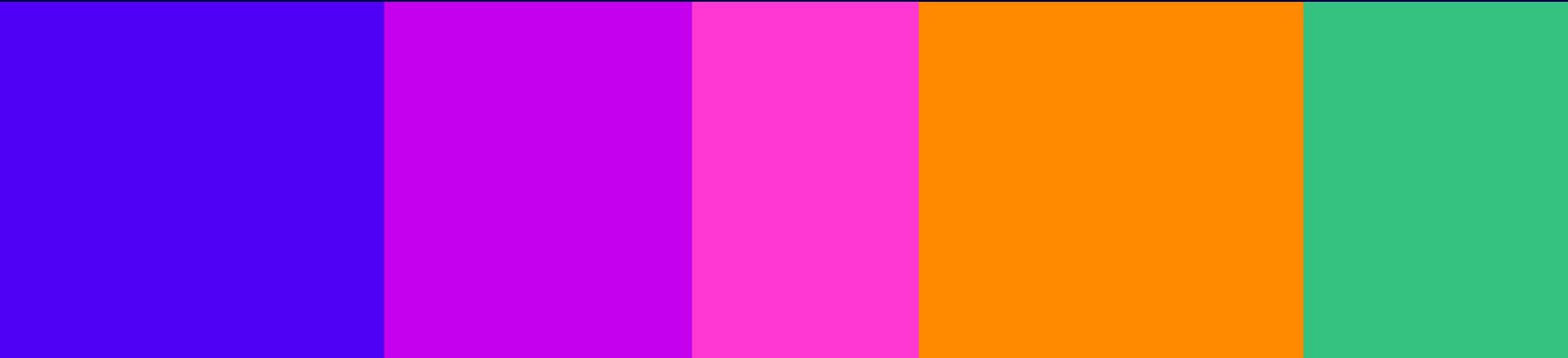
Source: Ofcom Quality of postal services survey Jan-24/Jul-24

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

Q8. Base: All respondents who have used [delivery company] in the past 6 months JAN/Jul 2024: Total (4048), North East (156), North West (450), Yorkshire and the Humber (338), West Midlands (353), East Midlands (320), East of England (406), London (508), South East (497), South West (369), Scotland (327), Wales (195), Northern Ireland (129), NET: England (3397), Urban (3429), Rural (461) ***Caution low base**

Section 5

Users with an impacting / limiting condition



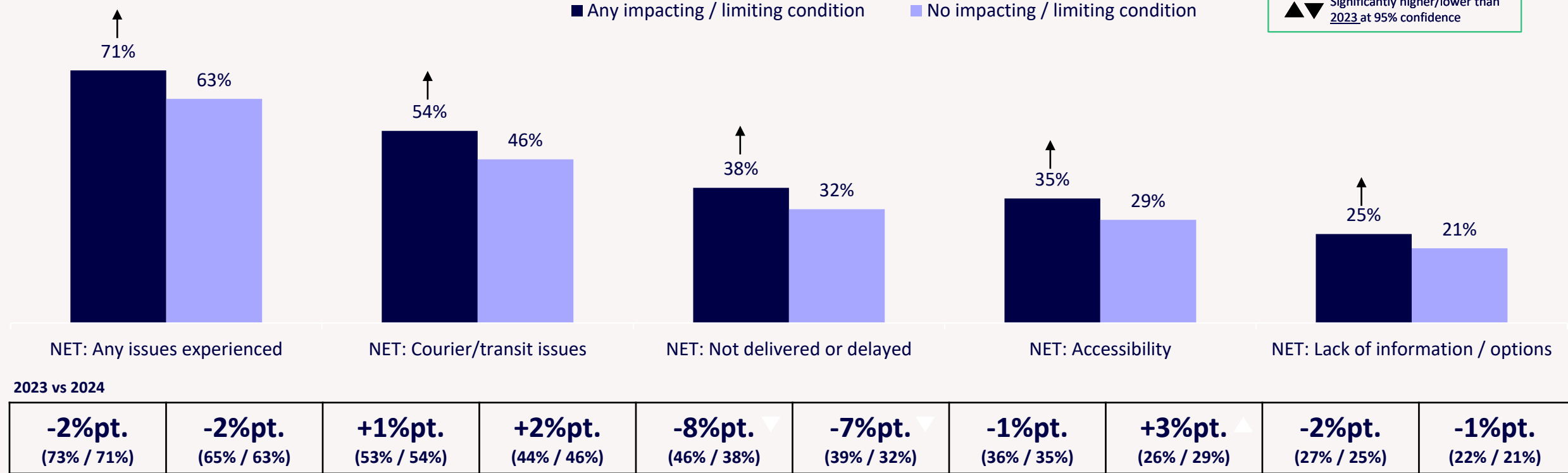
Users with impacting/limiting conditions remain significantly more likely to experience problems with delivery services in 2024



Experience of issues across all delivery companies – **those with impacting / limiting conditions (2024 data)**

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

▲ ▼ Significantly higher/lower than 2023 at 95% confidence



Source: Ofcom Quality of postal services survey Jan/Jul-24

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

Q3. Base: All respondents who have used [delivery company] in the past 6 months JAN/JULY 2023 COMBINED: Total (4107), Any impacting/limiting condition (1581), No impacting/limiting condition (2394); JAN/JULY 2024 COMBINED: Total (4048), Any impacting/limiting condition (1507), No impacting/limiting condition (2410)

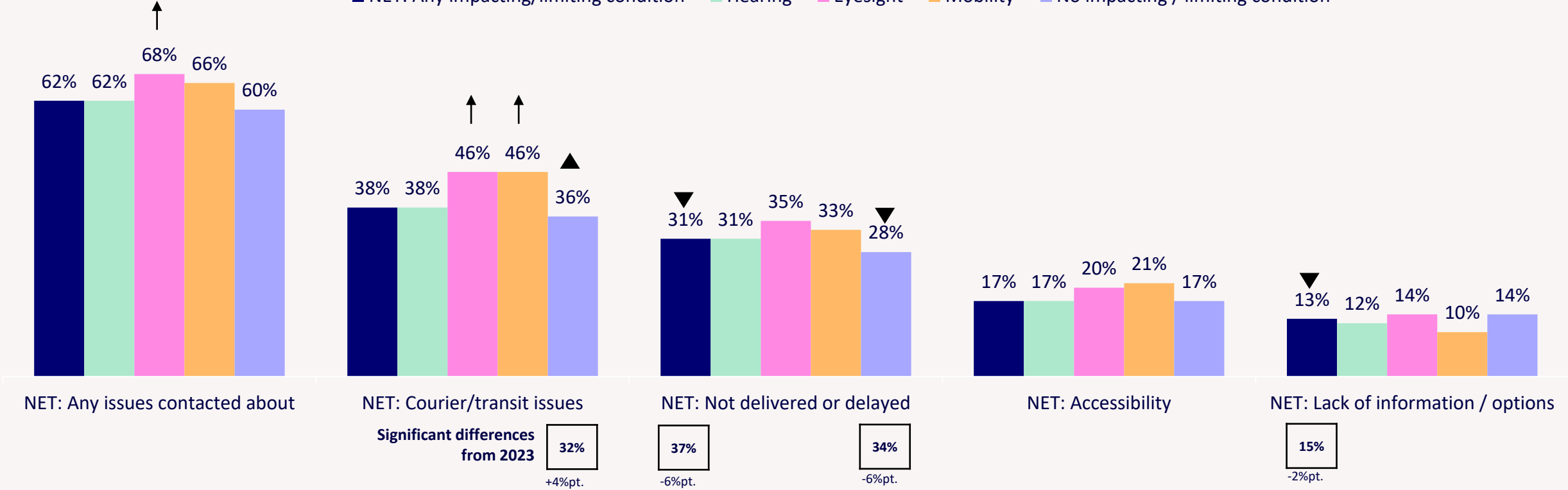
Users with impacting/limiting conditions are now similarly likely to those without to have contacted delivery companies about various issues

Issues contacted about – by any company (2024 data)

▲ ▼ Significantly higher/lower than 2023 at 95% confidence

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

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



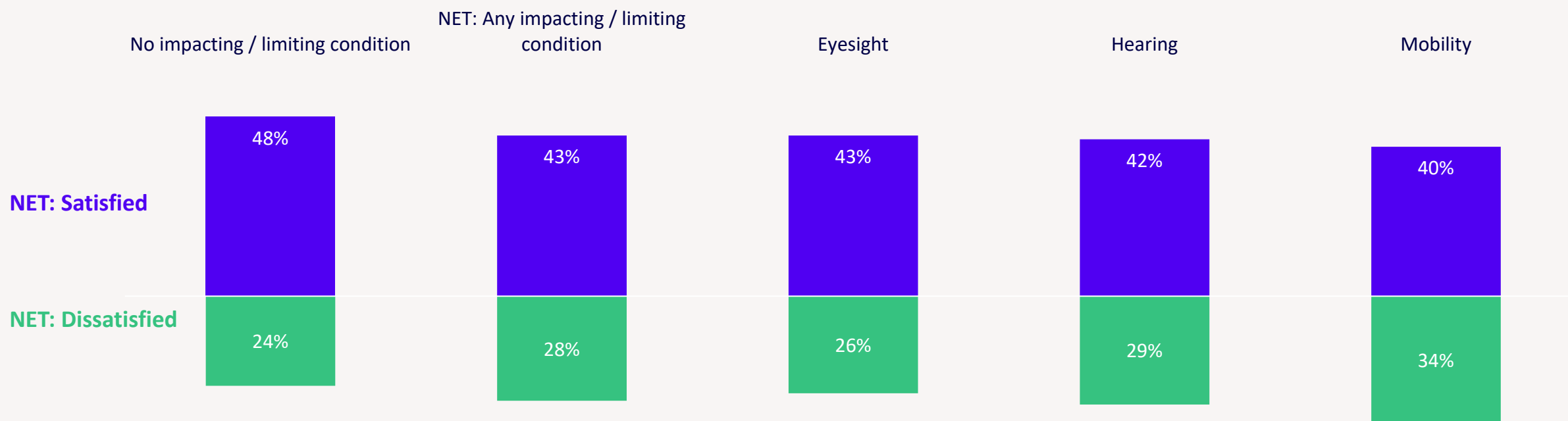
Source: Ofcom Quality of postal services survey Jan/Jul-24

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

Q4. Base: All respondents who have experienced an issue with [delivery company] in the past 6 months JAN/JULY 2023: Total (1675), Any impacting/limiting condition (707), Hearing (126), Eyesight (124), Mobility (177) No impacting/limiting condition (909); JAN/JULY 2024: Total (1649), Any impacting/limiting condition (671), Hearing (119), Eyesight (124), Mobility (186) No impacting/limiting condition (923)

Those with and without limiting/impacting conditions have similar satisfaction with the contact/ complaints process

Satisfaction and dissatisfaction with contact/ complaints process among those with an impacting/limiting condition - **Average across elements of the contact process across companies (2024 data)**



Source: Ofcom Quality of postal services survey Jan/July-24

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

Q6. Base: All respondents who have contacted about an issue [delivery company] in the past 6 months JAN/JULY 2024 impacting/limiting condition (672), Hearing (113), Eyesight (125), Mobility (181) No impacting/limiting condition (935). The "Average across companies score" was calculated by taking the total number of satisfied responses and dividing this by the total number of contact experiences rated by our sample. Caution should be applied due to small sample sizes. Significance testing has not been applied.

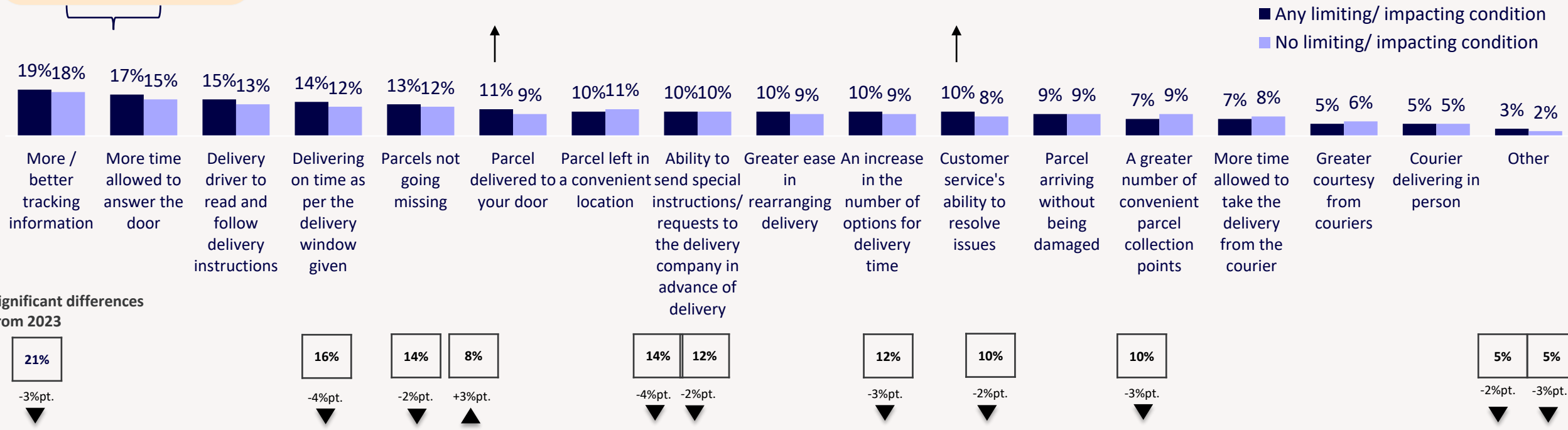
Those with limiting/impacting conditions would like to see a range of improvements, with the largest proportions of these users wanting better tracking information and more time to answer the door

QoS – Any limiting / impacting condition (2024 data)

Having more time allowed to answer the door is particularly key for those with **hearing** (22%) or **mobility** related conditions (20%)

▲ ▼ Significantly higher/lower than 2023 at 95% confidence

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

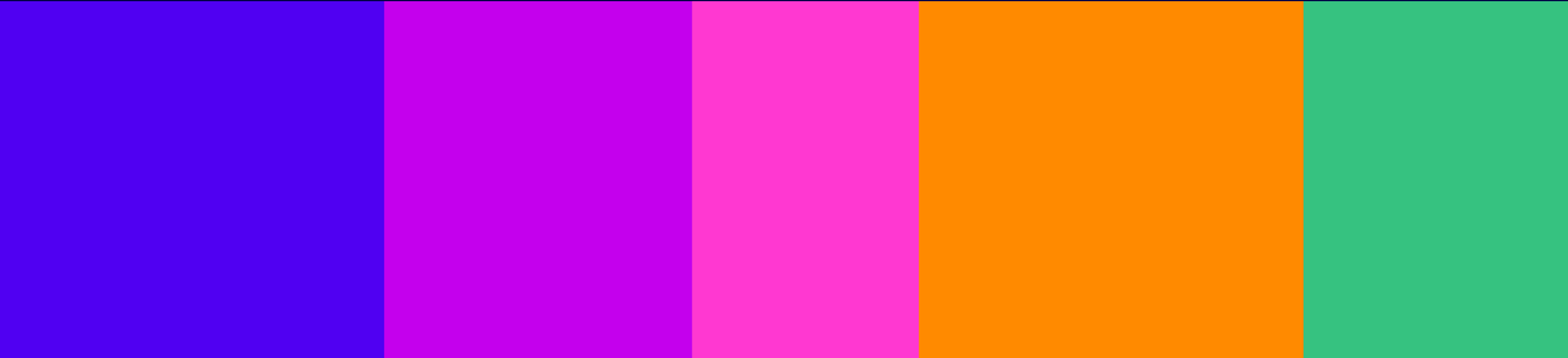


Source: Ofcom Quality of postal services survey Jan-24/ Jul-24

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

Q8. Base: All respondents who have used [delivery company] in the past 6 months JAN 2023/ JUL 2023: Any impacting/limiting condition (1578), No limiting/ impacting condition (2394); JAN 2024/ JUL 2024: Any impacting/limiting condition (1507), No limiting/ impacting condition (2410), Hearing (260), Mobility (389)

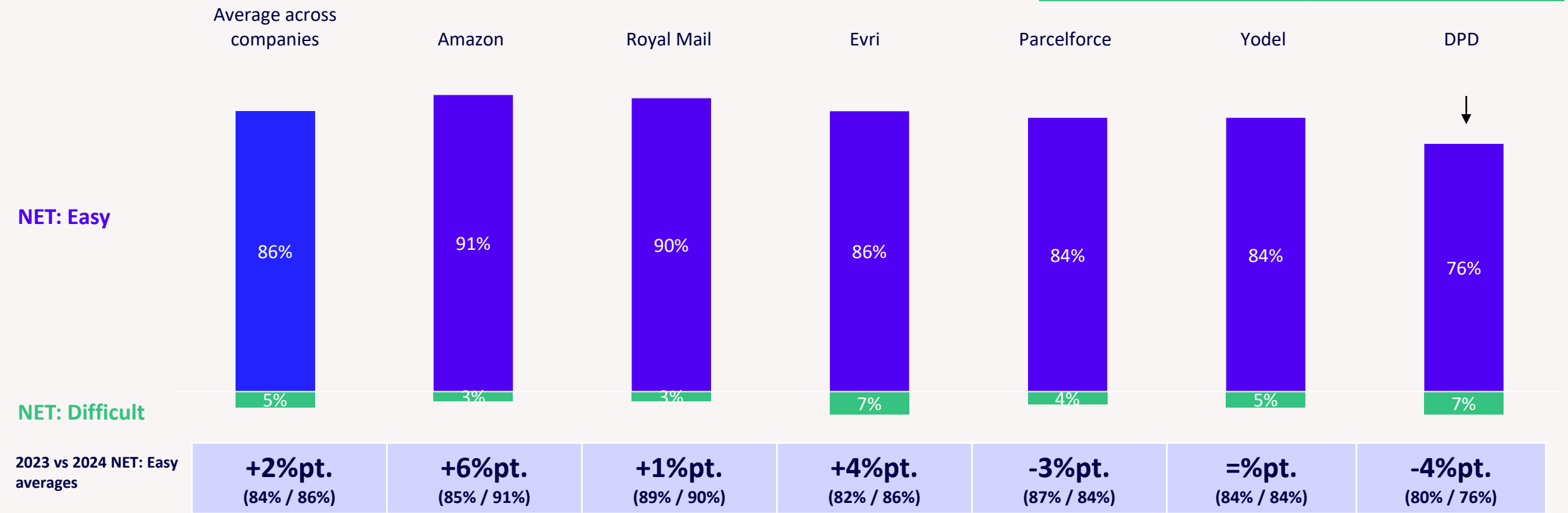
Appendix 1: Experience of sending parcels for those with an impacting / limiting condition



Parcel senders with an impacting or limiting condition say that the most common reason for experiencing difficulty when sending a parcel is insufficient drop off location options

Ease of sending parcel – those with an impacting/limiting condition (2024 data)

No Significant difference compared to 2023 at 95% confidence ↑ ↓ Significantly higher/lower than the average at 95% confidence



Source: Ofcom Quality of postal services survey Jan/Jul-24

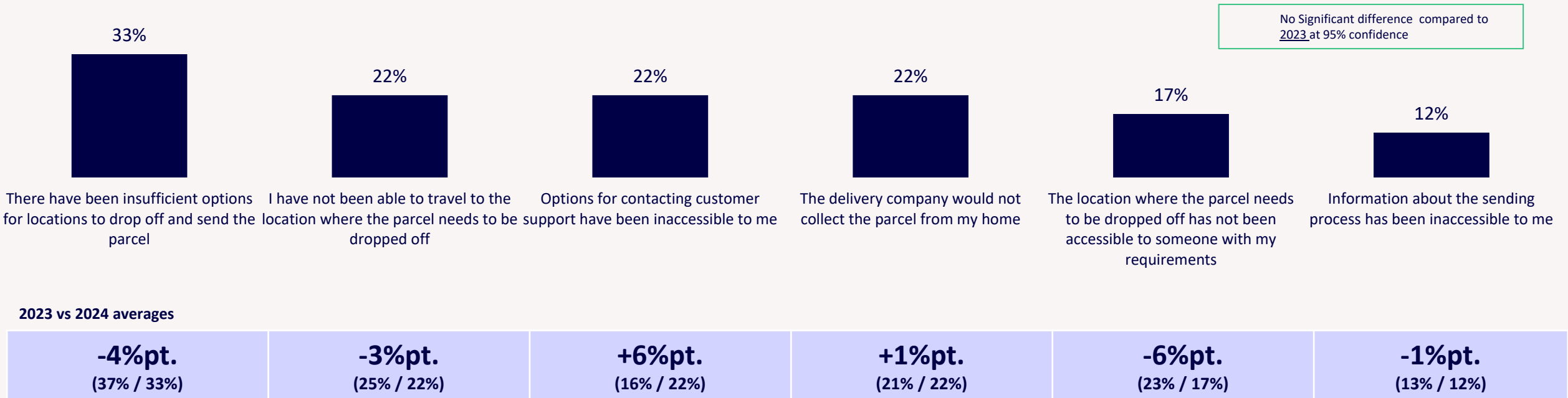
Q10. Ease of sending a parcel: You said you've used the following companies to send a parcel. In general, how easy or difficult have you found that process in the

Q10. Base: All respondents (with an impacting/limiting condition) who have used [delivery company] to send a parcel JAN/JULY 2024: Any (1279), Royal Mail (1063), DPD (170), Evri (487), Parcelforce (220), Yodel (160), Amazon (291), Delivery companies with a sample size of less than 100 are not shown.

Parcel senders with an impacting or limiting condition say that the most common reason for experiencing difficulty when sending a parcel is insufficient drop off location options



Difficulty in sending – those with a limiting/impacting condition by NET: Any company* (2024 data) – Top 6 reasons given

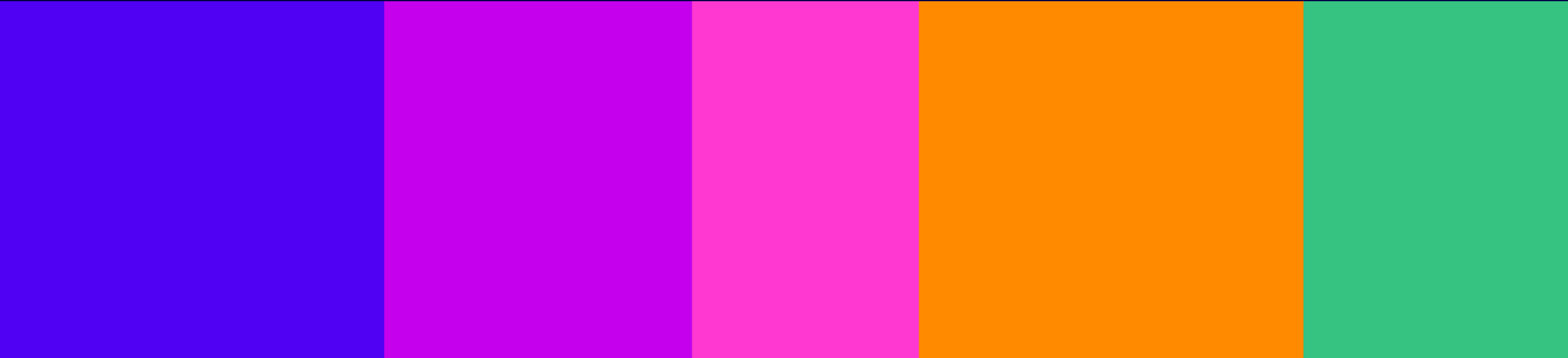


Source: Ofcom Quality of postal services survey Jan/Jul-24

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

Q11. Base: All respondents with a limiting/impacting condition who have used [delivery company] to send a parcel and found it difficult JAN/JULY 2024: NET: Any company (102)

Appendix 2: Methodological notes



Urban vs. Rural Analysis

We recognise that urban and rural locations may offer different challenges when it comes to parcel delivery services. Additional analysis has been done to explore whether those living in urban locations have a different experience of parcel delivery services compared to those who live in rural areas.

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

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

Impacting / limiting conditions

This report refers to people with impacting/limiting conditions. This wording reflects the question used to identify people who have a disability:

S5: 'Which of these, if any, impact or limit your daily activities or the work you can do?'

For the purposes of analysis, comparison has been made between those who do have impacting/limiting conditions and those who do not.

Additionally, three specific conditions have been focused on, those relating to:

- Eyesight
- Hearing
- Mobility