Residential Postal Tracker – Annual Report

Produced by: Jigsaw Research

Fieldwork: July 2023 – June 2024
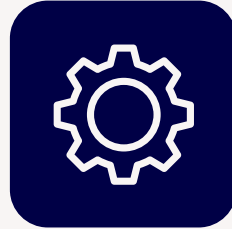
Introduction

Objective

The overall aim of the Residential Postal Tracker research is to accurately measure and assess usage and attitudes towards postal services among UK adults (aged 16+) and to understand their postal needs, access to services and reactions to potential changes in the postal services.

Methodology

The Residential Postal Tracker is a continuous interviewing mixed-method (online and face-to-face) survey of postal users.

A strict quota sampling approach is taken to ensure representativity across nations, rurality, ages, gender and social grade.

Data is then weighted back to be nationally representative.

Due to the Covid-19 pandemic, face to face interviewing was paused from March 2020 until December 2022. From January 2023 face-to-face was included and is reported on. Differences due to methodology have been flagged.
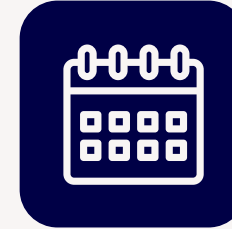
Fieldwork and reporting period

This document reports on yearly trends for data captured between July and June.

Specifically the report calls out significant changes between the year "July 2023 – June 2024" and the previous reporting period "July 2022 – June 2023".

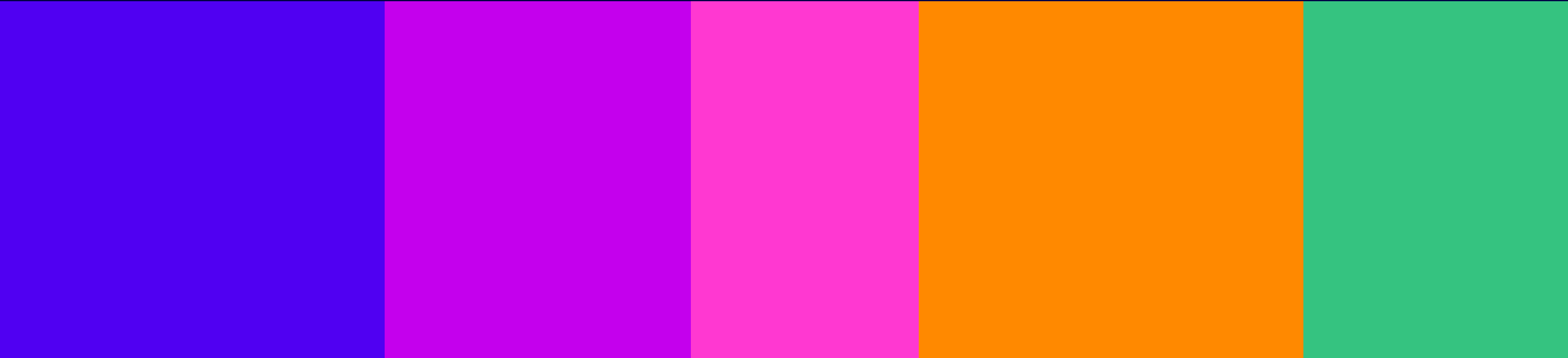When data is split by quarters, these relate to calendar year (Q1: Jan-Mar, Q2: Apr-Jun, Q3: Jul-Sep, Q4: Oct-Dec).

Contents

Section
1   Importance and usage of postal services
2   Letter affordability
3   Royal Mail satisfaction and letter complaints
4   Parcel sending
5   Parcel provider landscape
6   Sustainability

Importance and usage
of postal services

Instant messaging continues to become a more important means of communicating with friends and family while e-mail declines. Post is stable year on year

Importance of channels to communicate with friends and family (NET essential/fairly important)

Phone call

Mobile phone calls (Historic)

Instant messaging (e.g. WhatsApp, iMessage, Facebook Messenger) ▲

Email ▼

Post

Video calling (e.g. Skype, FaceTime, etc)

Method note: CAPI state less importance on post and email than Online.
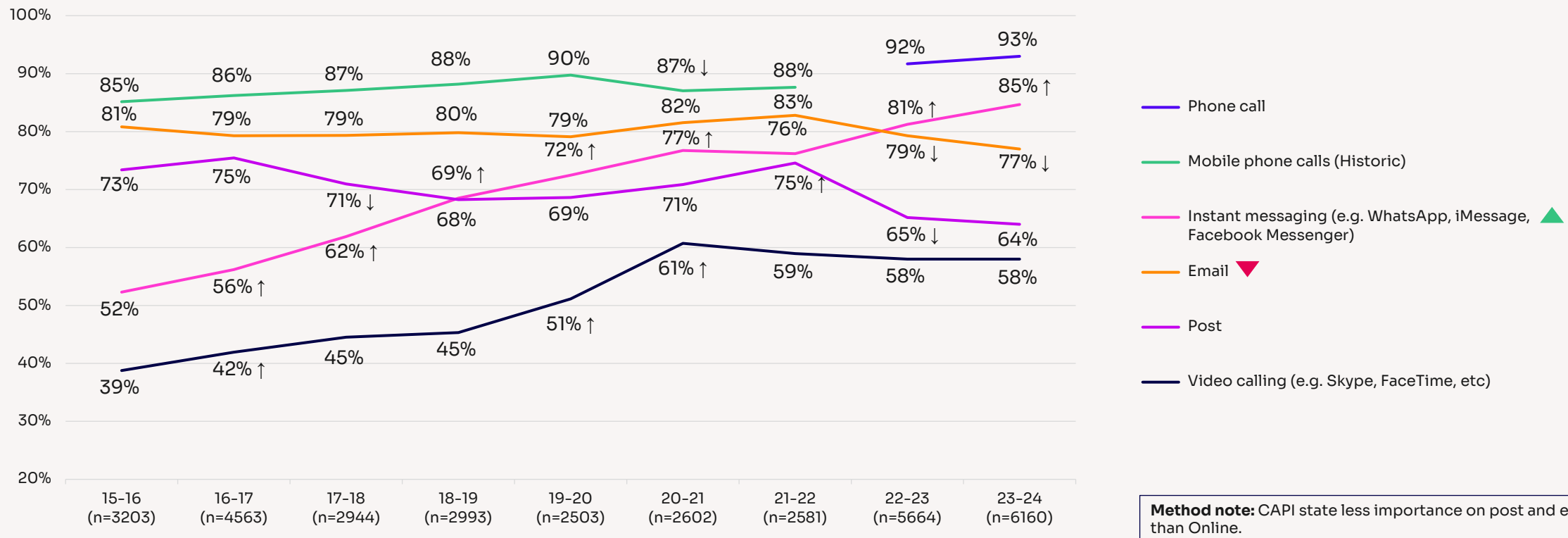
Source: Residential Postal Tracker.

C4. Thinking about how you communicate with friends and family, how important to you are each of these channels of communication?

Base: All participants (on even months) – Sample size shown on chart.

↑↓ ▲▼ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

8 in 10 say that there are some things they'll always needs to send by post, while half say they only use post if there is no alternative.

Attitudes to sending and receiving post (NET strongly/slightly agree)

↑ ↓ ▲ ▼ Arrows denote significant positive or negative change vs previous time period.
Significance testing to 95%.

There remains a widespread recognition that some things will always need to be sent by post, though e-mail is preferred whenever possible for 7 out of 10

Attitudes to sending and receiving post

Legend: ■ Don't know ■ Strongly disagree (1) ■ Slightly disagree (2) ■ Neither agree nor disagree (3) ■ Slightly agree (4) ■ Strongly agree (5)

NET agree

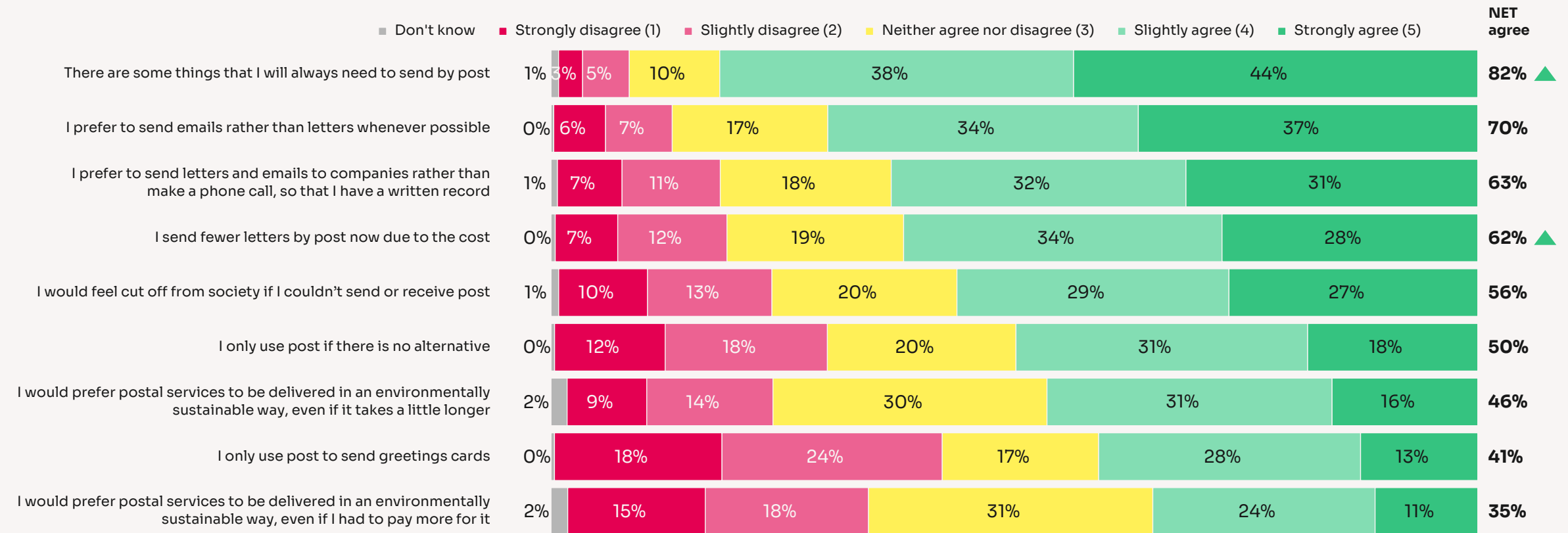| Statement	Don't know	Strongly disagree (1)	Slightly disagree (2)	Neither agree nor disagree (3)	Slightly agree (4)	Strongly agree (5)	NET agree
There are some things that I will always need to send by post	1%	3%	5%	10%	38%	44%	82% ▲
I prefer to send emails rather than letters whenever possible	0%	6%	7%	17%	34%	37%	70%
I prefer to send letters and emails to companies rather than make a phone call, so that I have a written record	1%	7%	11%	18%	32%	31%	63%
I send fewer letters by post now due to the cost	0%	7%	12%	19%	34%	28%	62% ▲
I would feel cut off from society if I couldn't send or receive post	1%	10%	13%	20%	29%	27%	56%
I only use post if there is no alternative	0%	12%	18%	20%	31%	18%	50%
I would prefer postal services to be delivered in an environmentally sustainable way, even if it takes a little longer	2%	9%	14%	30%	31%	16%	46%
I only use post to send greetings cards	0%	18%	24%	17%	28%	13%	41%
I would prefer postal services to be delivered in an environmentally sustainable way, even if I had to pay more for it	2%	15%	18%	31%	24%	11%	35%

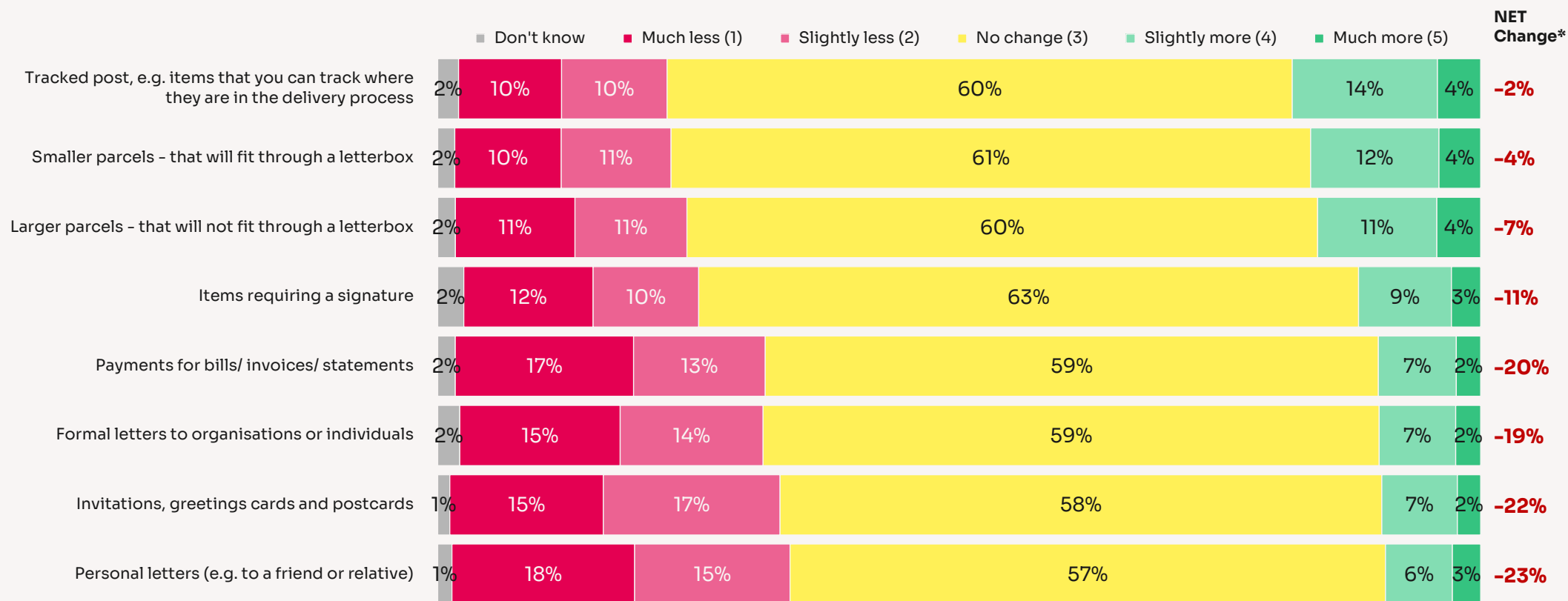Source: Residential Postal Tracker.

C3. Here are some statements that other people have made about sending and receiving post. To what extent do you agree or disagree with each one?

Base: All participants 2023-24 (n=6160).

▲▼ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

Postal users across all postage types believe they are sending less than they did two years ago

Postage <u>sending</u> behaviour vs 2 years ago

Legend: ■ Don't know ■ Much less (1) ■ Slightly less (2) ■ No change (3) ■ Slightly more (4) ■ Much more (5)

NET Change*

Category	Don't know	Much less (1)	Slightly less (2)	No change (3)	Slightly more (4)	Much more (5)	NET Change*
Tracked post, e.g. items that you can track where they are in the delivery process	2%	10%	10%	60%	14%	4%	**–2%**
Smaller parcels – that will fit through a letterbox	2%	10%	11%	61%	12%	4%	**–4%**
Larger parcels – that will not fit through a letterbox	2%	11%	11%	60%	11%	4%	**–7%**
Items requiring a signature	2%	12%	10%	63%	9%	3%	**–11%**
Payments for bills/ invoices/ statements	2%	17%	13%	59%	7%	2%	**–20%**
Formal letters to organisations or individuals	2%	15%	14%	59%	7%	2%	**–19%**
Invitations, greetings cards and postcards	1%	15%	17%	58%	7%	2%	**–22%**
Personal letters (e.g. to a friend or relative)	1%	18%	15%	57%	6%	3%	**–23%**

*NET change = (Much more + Slightly more) – (Much less + Slightly less).
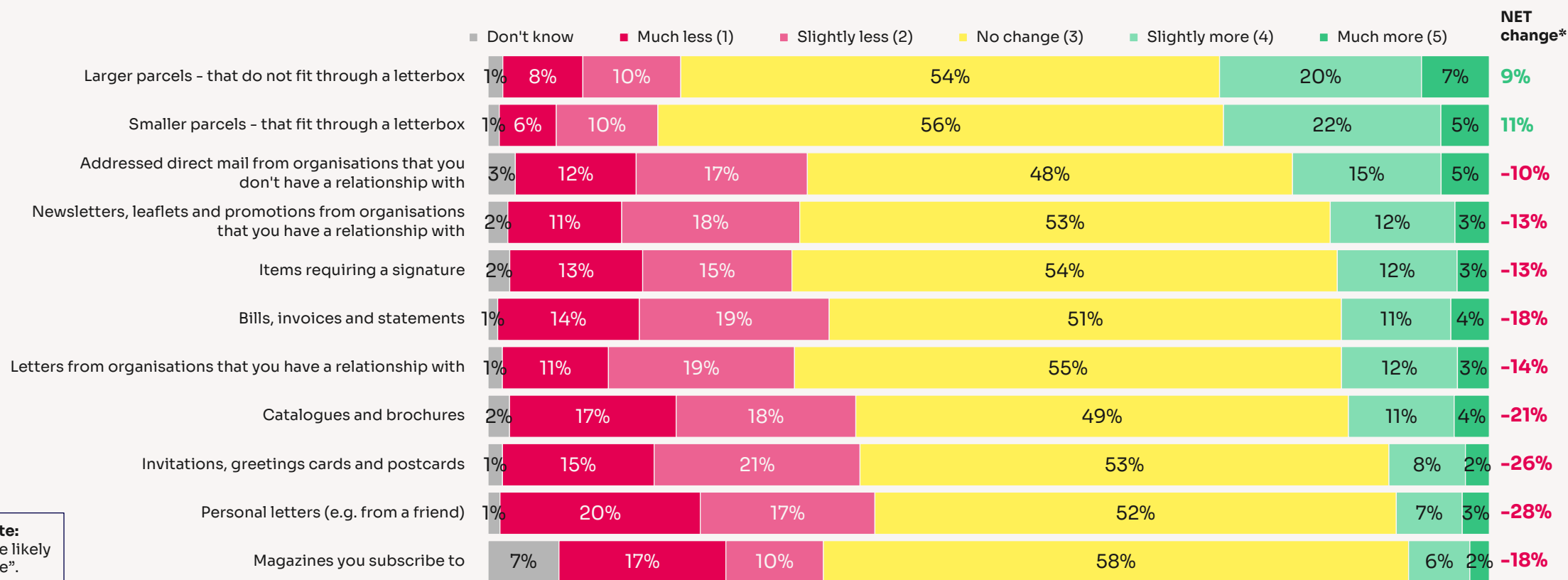
Source: Residential Postal Tracker.
G3 (old QD12). Thinking about these different types of mail, would you say that you now send them more or less often than two years ago? Or has there been no change? – NET MORE.
Base: All participants 2023–24 (n=6160).

Postal users have experienced a net decline in all letter post received, especially for personal mail like greeting cards and personal letters

Postage <u>receiving</u> behaviour vs 2 years ago

	Don't know	Much less (1)	Slightly less (2)	No change (3)	Slightly more (4)	Much more (5)	NET change*
Larger parcels - that do not fit through a letterbox	1%	8%	10%	54%	20%	7%	**9%**
Smaller parcels - that fit through a letterbox	1%	6%	10%	56%	22%	5%	**11%**
Addressed direct mail from organisations that you don't have a relationship with	3%	12%	17%	48%	15%	5%	**-10%**
Newsletters, leaflets and promotions from organisations that you have a relationship with	2%	11%	18%	53%	12%	3%	**-13%**
Items requiring a signature	2%	13%	15%	54%	12%	3%	**-13%**
Bills, invoices and statements	1%	14%	19%	51%	11%	4%	**-18%**
Letters from organisations that you have a relationship with	1%	11%	19%	55%	12%	3%	**-14%**
Catalogues and brochures	2%	17%	18%	49%	11%	4%	**-21%**
Invitations, greetings cards and postcards	1%	15%	21%	53%	8%	2%	**-26%**
Personal letters (e.g. from a friend)	1%	20%	17%	52%	7%	3%	**-28%**
Magazines you subscribe to	7%	17%	10%	58%	6%	2%	**-18%**

Method note:
Online more likely to say "More".
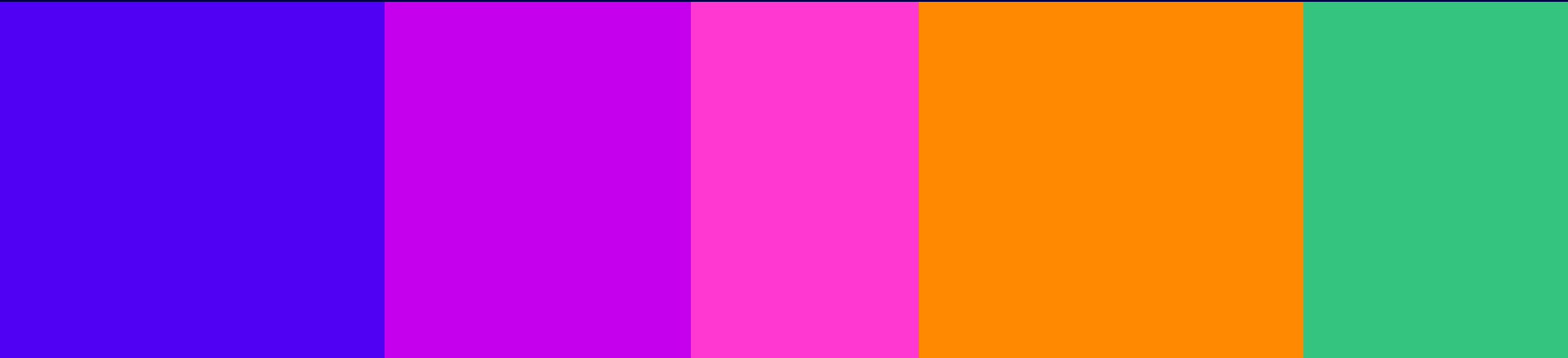
*NET change = (Much more + Slightly more) – (Much less + Slightly less).

Source: Residential Postal Tracker.

E2. Thinking about these different types of mail, would you say that you now receive them more or less often than two years ago? Or has there been no change?
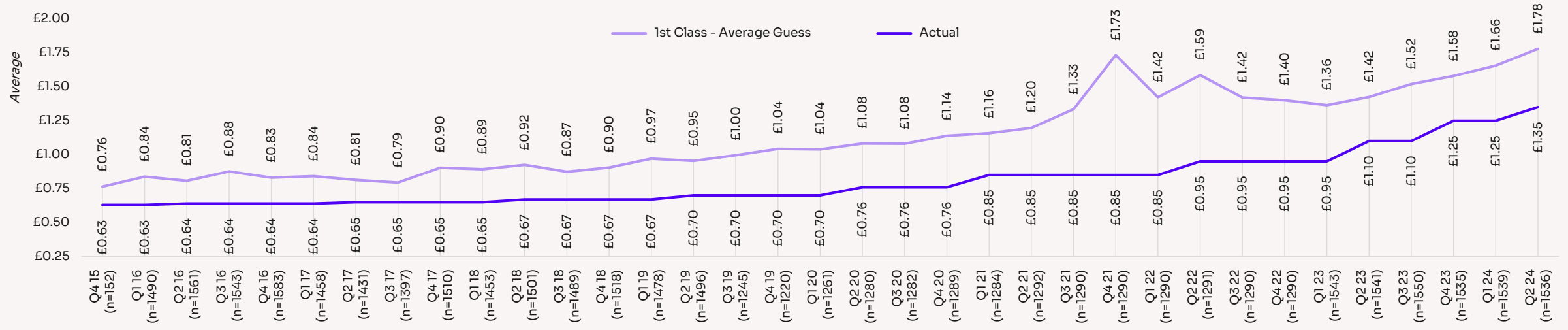
Base: All participants 2023–24 (n=6160).
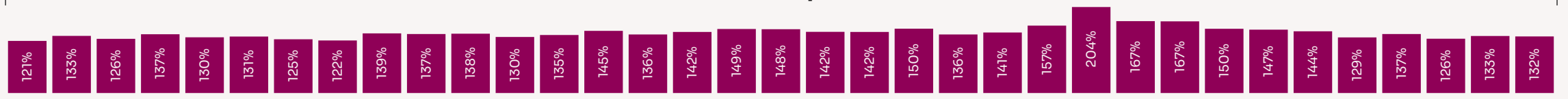
Letter affordability

The average estimated cost of a 1st Class stamp has risen to £1.78 in the most recent quarter
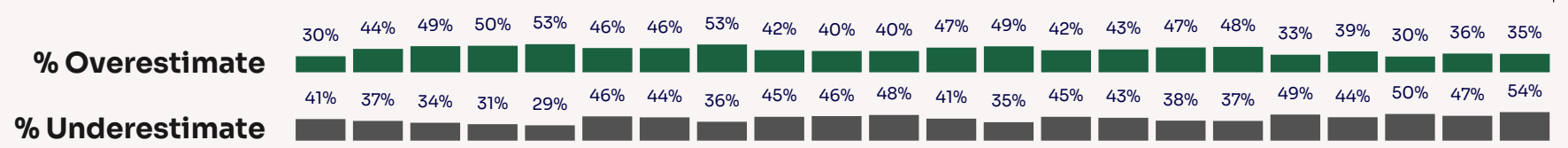
Estimated cost of a 1st class stamp

Legend: 1st Class – Average Guess | Actual

1st Class – Average Guess values: £0.76, £0.84, £0.81, £0.88, £0.83, £0.84, £0.81, £0.79, £0.90, £0.89, £0.92, £0.87, £0.90, £0.97, £0.95, £1.00, £1.04, £1.04, £1.08, £1.08, £1.14, £1.16, £1.20, £1.33, £1.73, £1.42, £1.59, £1.42, £1.40, £1.36, £1.42, £1.52, £1.58, £1.66, £1.78

Actual values: £0.63, £0.63, £0.64, £0.64, £0.64, £0.64, £0.65, £0.65, £0.65, £0.65, £0.67, £0.67, £0.67, £0.67, £0.70, £0.70, £0.70, £0.70, £0.76, £0.76, £0.76, £0.85, £0.85, £0.85, £0.85, £0.85, £0.95, £0.95, £0.95, £0.95, £1.10, £1.10, £1.25, £1.25, £1.35

X-axis labels: Q4 15 (n=152), Q1 16 (n=1490), Q2 16 (n=1561), Q3 16 (n=1543), Q4 16 (n=1583), Q1 17 (n=1458), Q2 17 (n=1431), Q3 17 (n=1397), Q4 17 (n=1510), Q1 18 (n=1453), Q2 18 (n=1501), Q3 18 (n=1489), Q4 18 (n=1518), Q1 19 (n=1478), Q2 19 (n=1496), Q3 19 (n=1245), Q4 19 (n=1220), Q1 20 (n=1261), Q2 20 (n=1280), Q3 20 (n=1282), Q4 20 (n=1289), Q1 21 (n=1284), Q2 21 (n=1292), Q3 21 (n=1290), Q4 21 (n=1290), Q1 22 (n=1290), Q2 22 (n=1291), Q3 22 (n=1290), Q4 22 (n=1290), Q1 23 (n=1543), Q2 23 (n=1541), Q3 23 (n=1550), Q4 23 (n=1535), Q1 24 (n=1539), Q2 24 (n=1536)

% difference in 1st class perceived vs actual

121%, 133%, 126%, 137%, 130%, 131%, 125%, 122%, 139%, 137%, 138%, 130%, 135%, 145%, 136%, 142%, 149%, 148%, 142%, 142%, 150%, 136%, 141%, 157%, 204%, 167%, 167%, 150%, 147%, 144%, 129%, 137%, 126%, 133%, 132%

% over vs underestimate

% Overestimate													30%	44%	49%	50%	53%	46%	46%	53%	42%	40%	40%	47%	49%	42%	43%	47%	48%	33%	39%	30%	36%	35%
% Underestimate													41%	37%	34%	31%	29%	46%	44%	36%	45%	46%	48%	41%	35%	45%	43%	38%	37%	49%	44%	50%	47%	54%

Meanwhile, the average estimated cost of a 2nd Class stamp is now £1.21

Estimated cost of a 2nd class stamp

Average

Legend: 2nd Class - Average Guess — Actual

% difference in 2nd class perceived vs actual

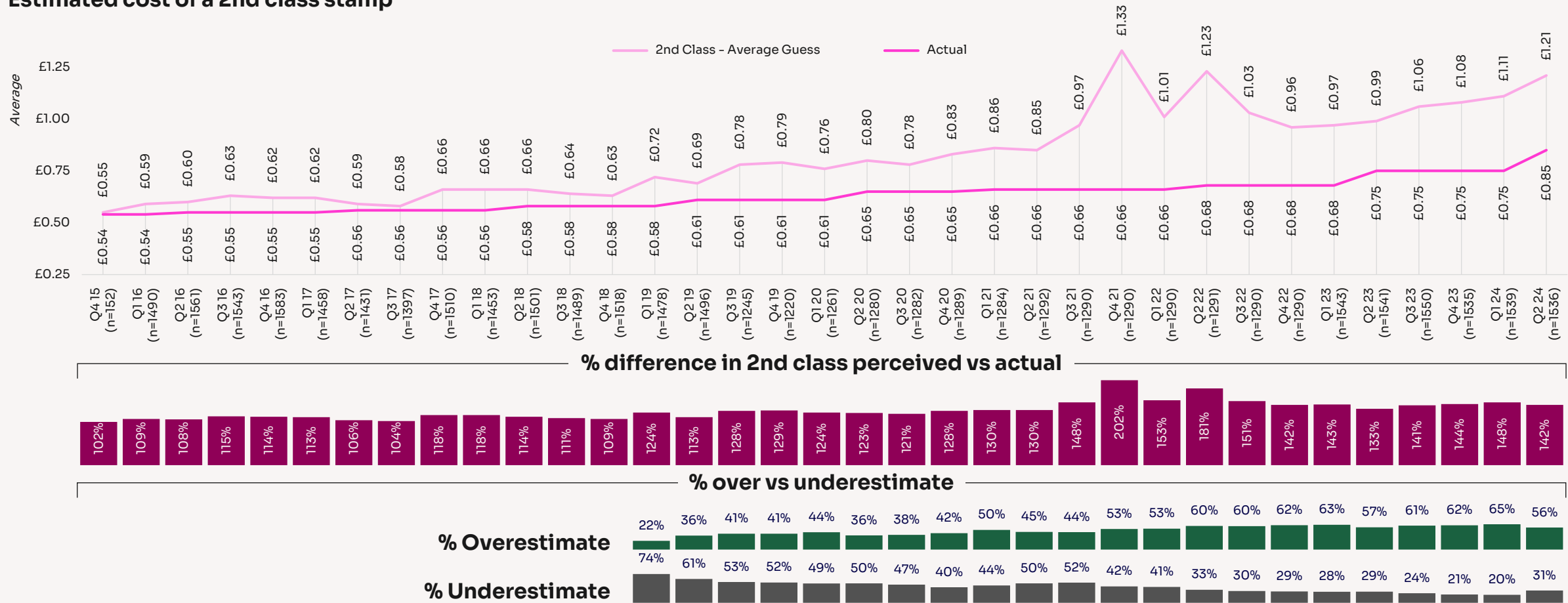**% over vs underestimate**

% Overestimate / **% Underestimate**

Source: Residential Postal Tracker.

H4. (Old QF3) Giving your best guess, how much do you think a second class stamp for a standard letter costs today?

Base: All participants – Sample size shown on chart.

The perceived value for money of both 1st and 2nd class stamps has declined significantly in Quarter 2 2024

Value for Money (NET Good Value for Money)
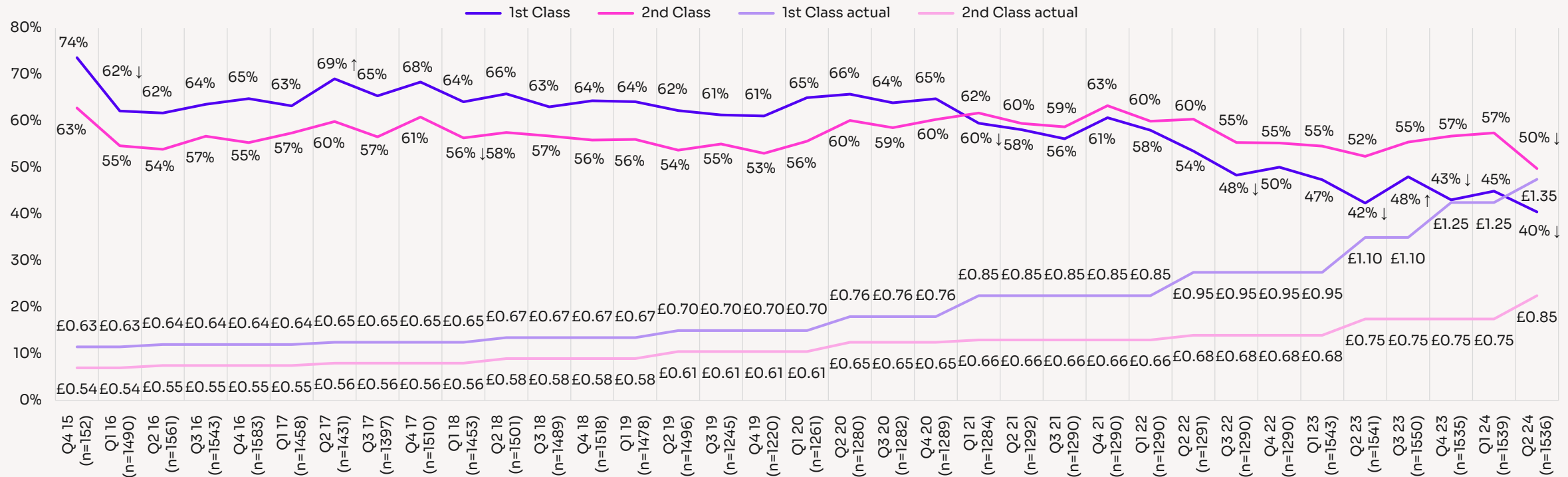
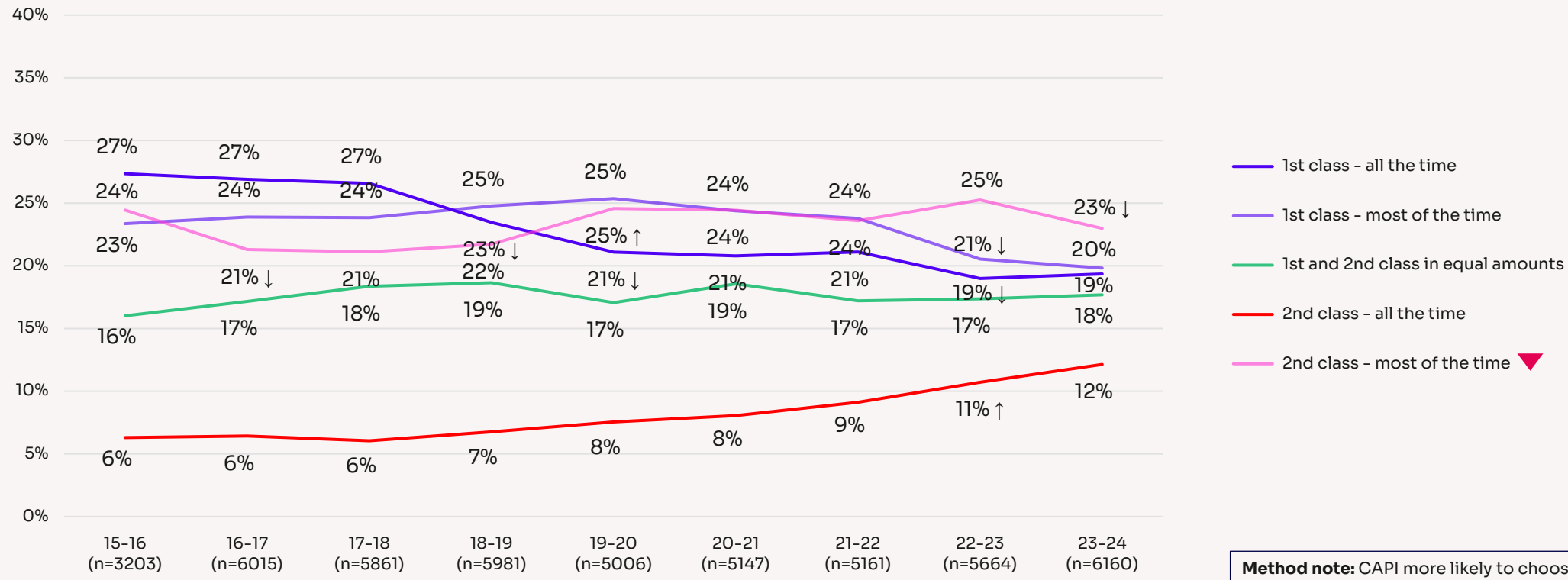**Method note:** Online more likely to say good VFM.

Source: Residential Postal Tracker. H5. (old QF4) We can tell you that a first class stamp for a standard letter currently costs [price]. How would you rate Royal Mail's first class service in terms of value for money? H6.(old QF5) We can tell you that a second class stamp for a standard letter currently costs [price]. How would you rate Royal Mail's second class service in terms of value for money?

Base: All participants – Sample size shown on chart.

Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

The proportion that say they use Second Class all of the time has been increasing as claimed use of First Class has declined

Services used when sending letters or cards

Legend:
- 1st class – all the time
- 1st class – most of the time
- 1st and 2nd class in equal amounts
- 2nd class – all the time
- 2nd class – most of the time ▼

X-axis categories:
- 15-16 (n=3203)
- 16-17 (n=6015)
- 17-18 (n=5861)
- 18-19 (n=5981)
- 19-20 (n=5006)
- 20-21 (n=5147)
- 21-22 (n=5161)
- 22-23 (n=5664)
- 23-24 (n=6160)

1st class – all the time: 27%, 27%, 27%, 25%, 21%, 21%, 21%, 19%, 19%
1st class – most of the time: 24%, 24%, 24%, 25%, 25%↑, 24%, 24%, 21%↓, 20%
1st and 2nd class in equal amounts: 16%▼, 17%, 18%, 19%, 17%, 19%, 17%, 17%, 18%
2nd class – all the time: 6%, 6%, 6%, 7%, 8%, 8%, 9%, 11%↑, 12%
2nd class – most of the time: 23%, 21%↓, 21%, 23%↓ / 22%, 25%, 24%, 24%, 25%, 23%↓

Method note: CAPI more likely to choose 1st Class.

Source: Residential Postal Tracker.

H8. (Old QF7) When sending letters or cards, which service do you tend to use?

Base: All participants – Sample size shown on chart.

↑ ↓ ▲ ▼ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

Cost continues to trend upwards as the main reason for choosing to use 2nd class stamps all/most of the time

Influences for using 2nd class stamps all/most of the time (selected reasons)
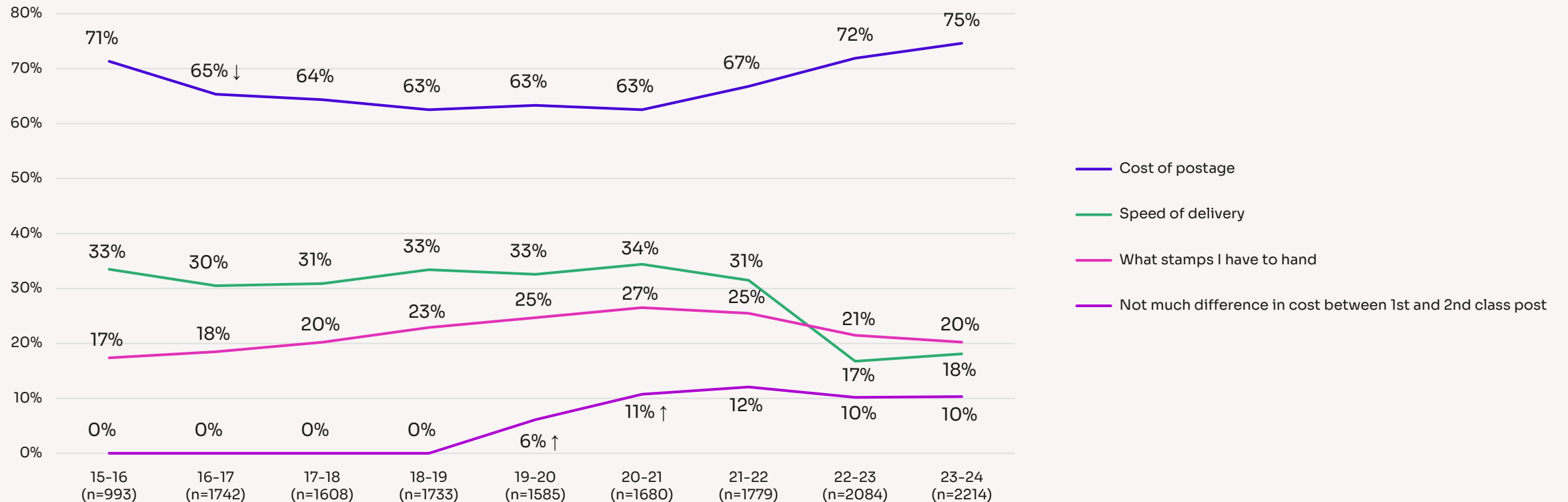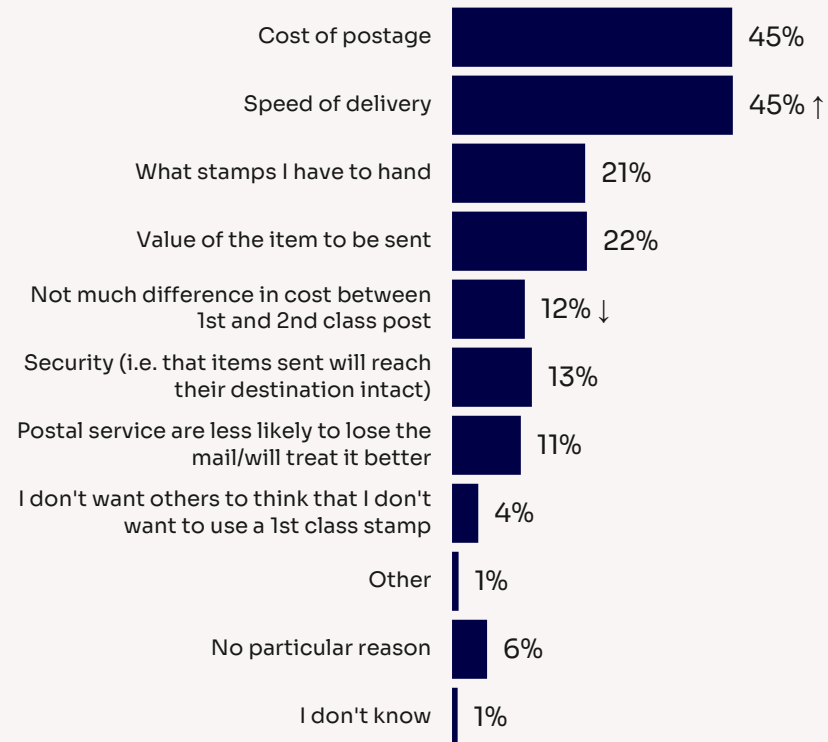

Source: Residential Postal Tracker.

H9. (old QF9) Which, if any, of these describe your reasons for your choice of postage stamps when using them

Base: Those using 2nd class all/most of the time – Sample sizes shown on chart.
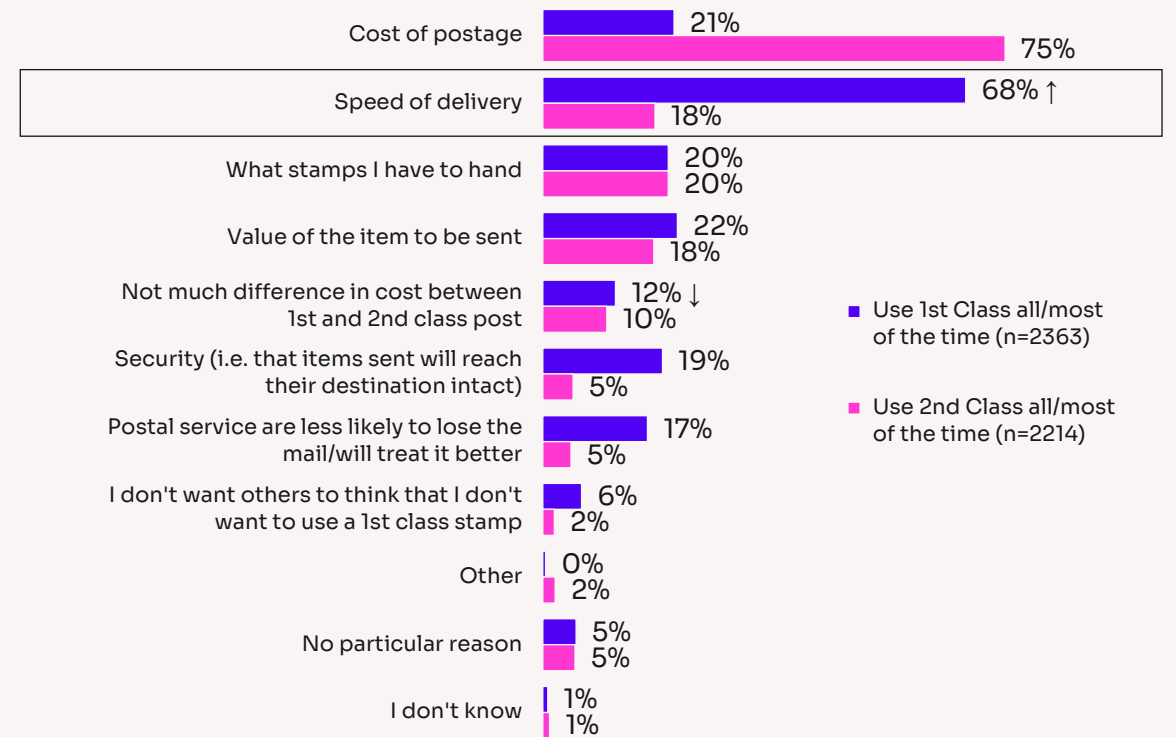
Those who choose to send via 1st class most or all of the time do so primarily for the speed of delivery

Influences for using either 1st or 2nd class stamps

Total reasons for choice of stamps 23-24

Reason	%
Cost of postage	45%
Speed of delivery	45% ↑
What stamps I have to hand	21%
Value of the item to be sent	22%
Not much difference in cost between 1st and 2nd class post	12% ↓
Security (i.e. that items sent will reach their destination intact)	13%
Postal service are less likely to lose the mail/will treat it better	11%
I don't want others to think that I don't want to use a 1st class stamp	4%
Other	1%
No particular reason	6%
I don't know	1%

Spend on letters in the last months (letter and cards 23-24)

Reason	Use 1st Class all/most of the time (n=2363)	Use 2nd Class all/most of the time (n=2214)
Cost of postage	21%	75%
Speed of delivery	68% ↑	18%
What stamps I have to hand	20%	20%
Value of the item to be sent	22%	18%
Not much difference in cost between 1st and 2nd class post	12% ↓	10%
Security (i.e. that items sent will reach their destination intact)	19%	5%
Postal service are less likely to lose the mail/will treat it better	17%	5%
I don't want others to think that I don't want to use a 1st class stamp	6%	2%
Other	0%	2%
No particular reason	5%	5%
I don't know	1%	1%

■ Use 1st Class all/most of the time (n=2363)

■ Use 2nd Class all/most of the time (n=2214)
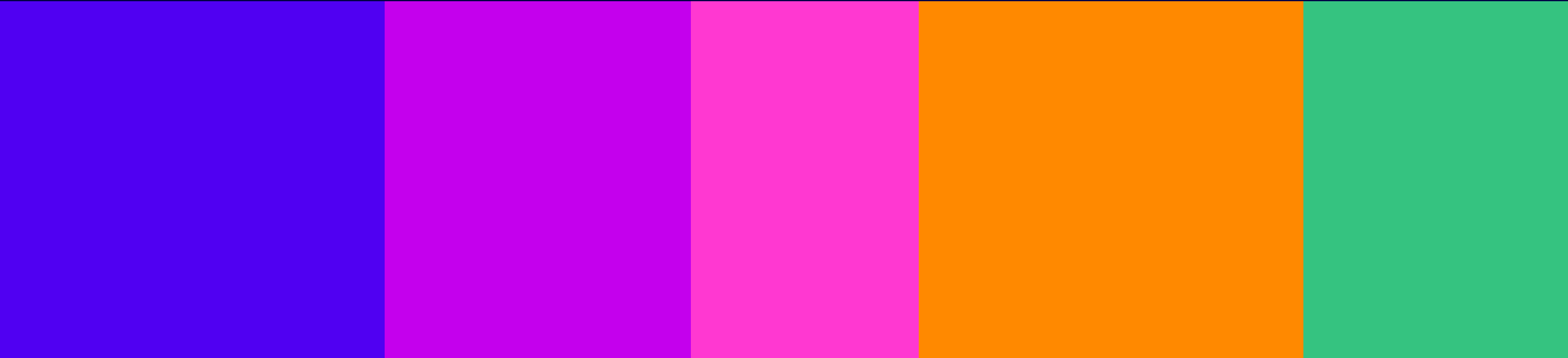
Source: Residential Postal Tracker.
H9. (Old QF9) Which, if any, of these describe your reasons for your choice of postage stamps when using them?
Base: Those who purchased stamps.

↑ ↓ Arrows denote significant positive or negative change vs previous time period.
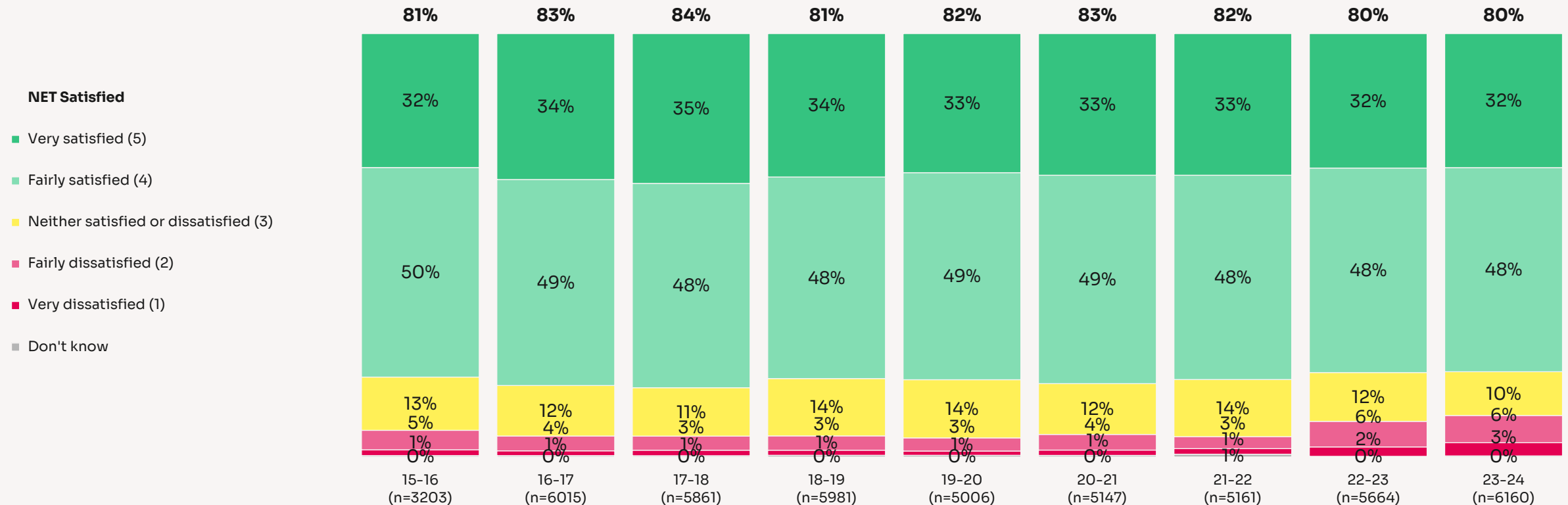Significance testing to 95%.

Royal Mail satisfaction and letter complaints

Overall satisfaction with Royal Mail has continued to remain high over time, but dissatisfaction has begun to increase over the past 2 years

Overall satisfaction with Royal Mail

NET Satisfied

- Very satisfied (5)
- Fairly satisfied (4)
- Neither satisfied or dissatisfied (3)
- Fairly dissatisfied (2)
- Very dissatisfied (1)
- Don't know

	81%	83%	84%	81%	82%	83%	82%	80%	80%
Very satisfied	32%	34%	35%	34%	33%	33%	33%	32%	32%
Fairly satisfied	50%	49%	48%	48%	49%	49%	48%	48%	48%
Neither	13%	12%	11%	14%	14%	12%	14%	12%	10%
Fairly dissatisfied	5%	4%	3%	3%	3%	4%	3%	6%	6%
	1%	1%	1%	1%	1%	1%	1%	2%	3%
Very dissatisfied	0%	0%	0%	0%	0%	0%	1%	0%	0%
	15-16 (n=3203)	16-17 (n=6015)	17-18 (n=5861)	18-19 (n=5981)	19-20 (n=5006)	20-21 (n=5147)	21-22 (n=5161)	22-23 (n=5664)	23-24 (n=6160)

Source: Residential Postal Tracker.

D2. (Old QG5) How would you rate your overall satisfaction with Royal Mail?

Base: All participants – Sample size shown on chart.

Despite high overall satisfaction with the Royal Mail, last year's significant drop in satisfaction with the cost of postage is maintained into 23-24
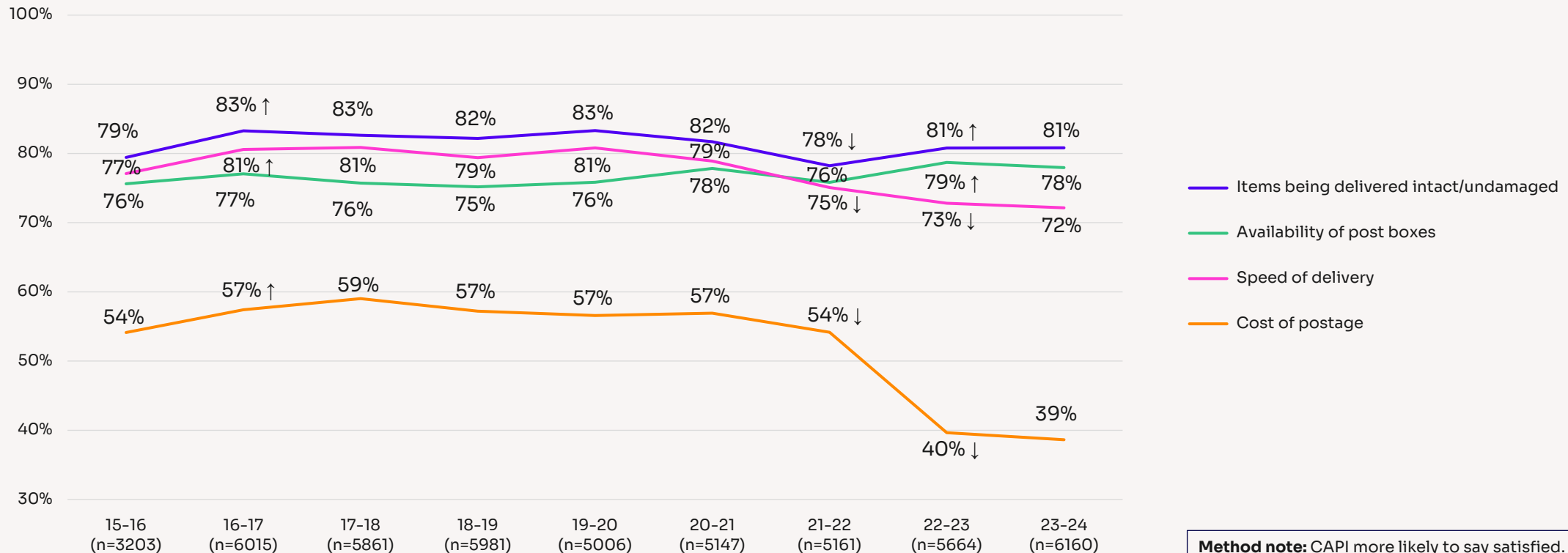
Satisfaction with Royal Mail's service elements

Legend:
- Items being delivered intact/undamaged
- Availability of post boxes
- Speed of delivery
- Cost of postage

Items being delivered intact/undamaged: 79%, 83% ↑, 83%, 82%, 83%, 82%, 78% ↓, 81% ↑, 81%

Speed of delivery: 77%, 81% ↑, 81%, 79%, 81%, 79%, 76%, 73% ↓, 72%

Availability of post boxes: 76%, 77%, 76%, 75%, 76%, 78%, 75% ↓, 79% ↑, 78%

Cost of postage: 54%, 57% ↑, 59%, 57%, 57%, 57%, 54% ↓, 40% ↓, 39%

X-axis:
15-16 (n=3203), 16-17 (n=6015), 17-18 (n=5861), 18-19 (n=5981), 19-20 (n=5006), 20-21 (n=5147), 21-22 (n=5161), 22-23 (n=5664), 23-24 (n=6160)

Chart only showing significant differences

Method note: CAPI more likely to say satisfied.
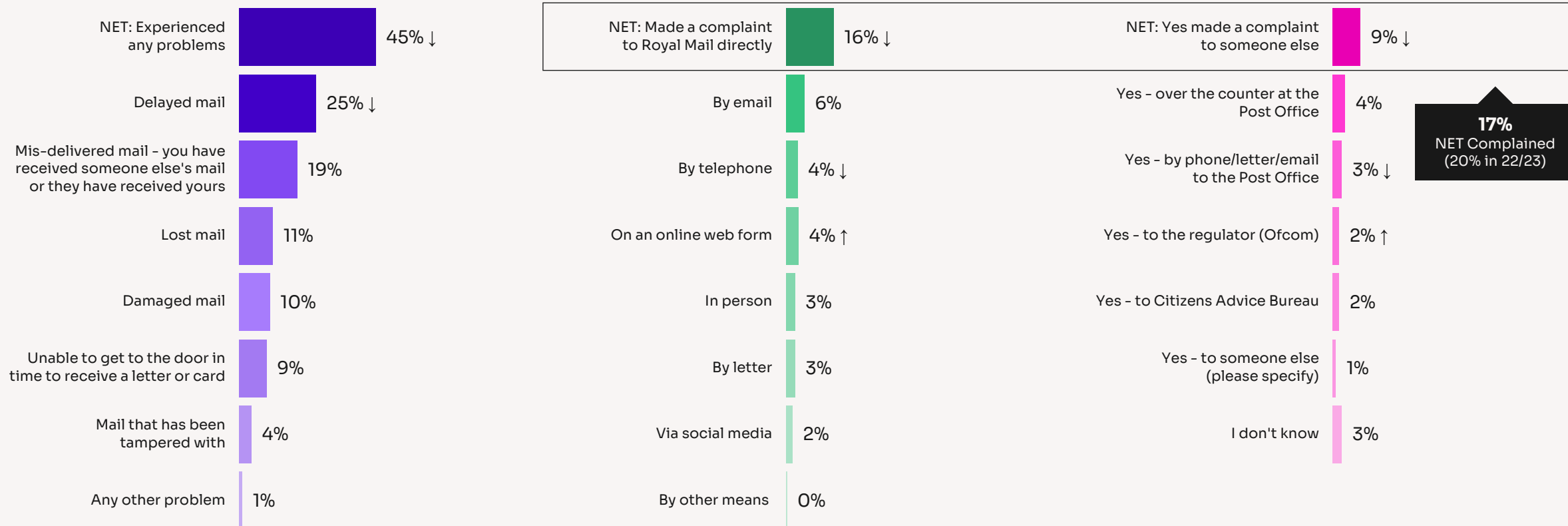
Source: Residential Postal Tracker.

D3. (Old QG3) How satisfied are you with the following aspects of Royal Mail's service?

Base: All participants – Sample size shown on chart.

↑ ↓ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

45% of postal users said that they have experienced some form of problem in the last 12 months

Incidence of problems and complaints with the Royal Mail – among <u>all</u> postal users

Problem	%
NET: Experienced any problems	45% ↓
Delayed mail	25% ↓
Mis-delivered mail – you have received someone else's mail or they have received yours	19%
Lost mail	11%
Damaged mail	10%
Unable to get to the door in time to receive a letter or card	9%
Mail that has been tampered with	4%
Any other problem	1%

Complaint to Royal Mail directly	%
NET: Made a complaint to Royal Mail directly	16% ↓
By email	6%
By telephone	4% ↓
On an online web form	4% ↑
In person	3%
By letter	3%
Via social media	2%
By other means	0%

Complaint to someone else	%
NET: Yes made a complaint to someone else	9% ↓
Yes – over the counter at the Post Office	4%
Yes – by phone/letter/email to the Post Office	3% ↓
Yes – to the regulator (Ofcom)	2% ↑
Yes – to Citizens Advice Bureau	2%
Yes – to someone else (please specify)	1%
I don't know	3%

17% NET Complained (20% in 22/23)

Method note: Online more likely to experience issues.
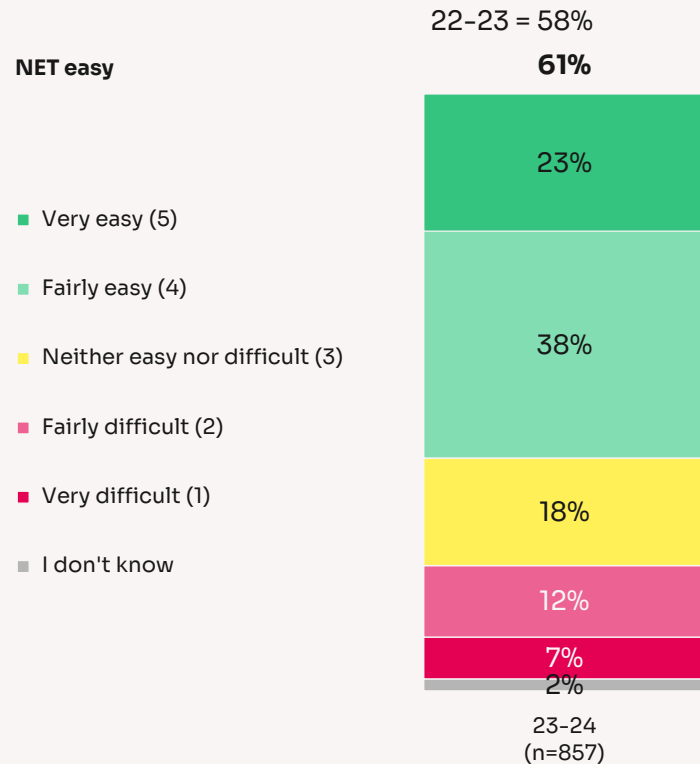
↑ ↓ Arrows denote significant positive or negative change vs previous time period.
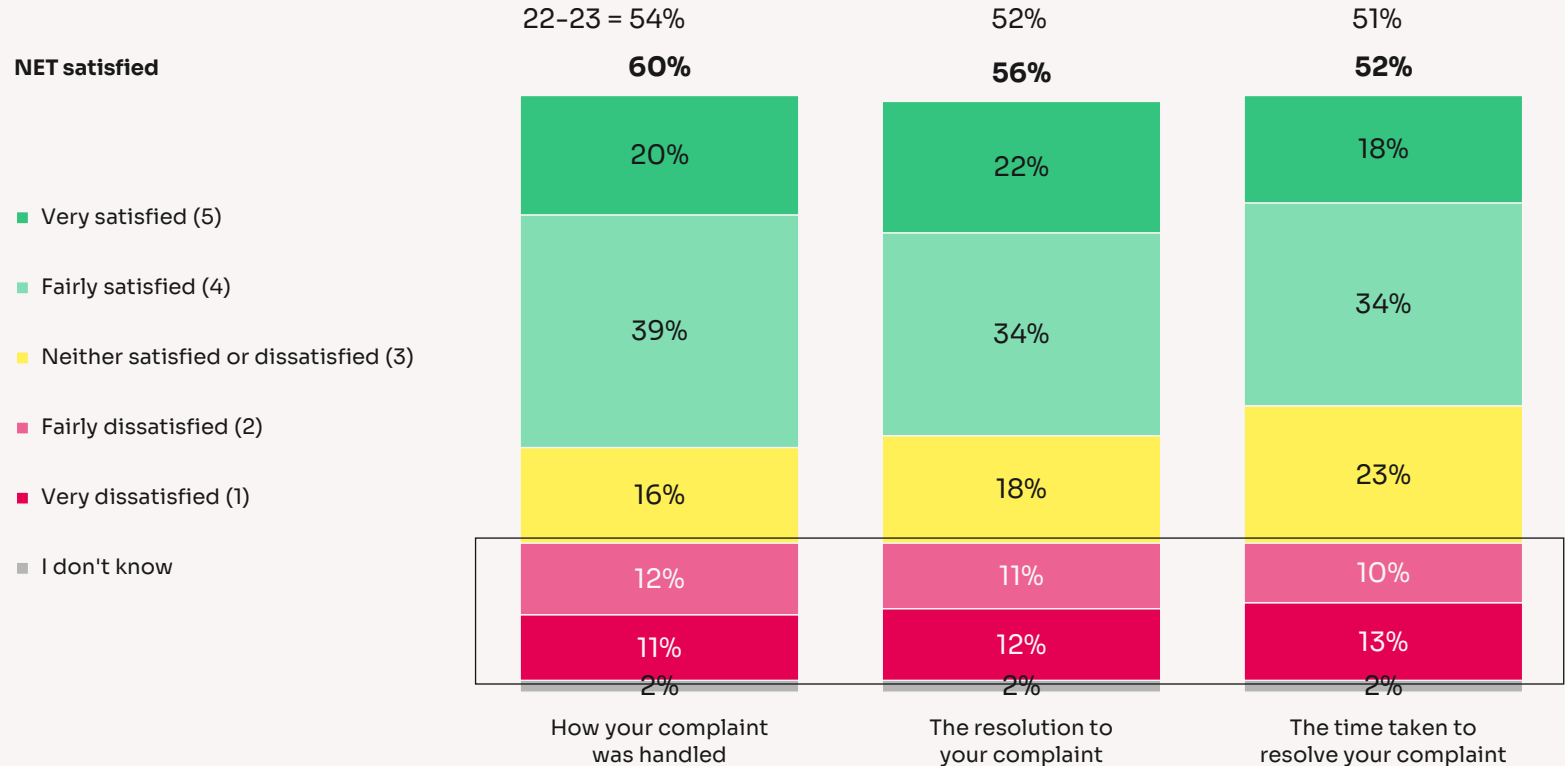
Significance testing to 95%.

6 in 10 found the complaints process easy. Satisfaction with complaint handling has improved slightly, however almost a quarter remain dissatisfied

Ease of complaining and satisfaction

Ease of complaining to the Royal Mail

22-23 = 58%

NET easy   **61%**

- ■ Very easy (5)
- ■ Fairly easy (4)
- ■ Neither easy nor difficult (3)
- ■ Fairly difficult (2)
- ■ Very difficult (1)
- ■ I don't know

Bar (23-24, n=857):
- 23%
- 38%
- 18%
- 12%
- 7%
- 2%

23-24
(n=857)

Satisfaction with…

NET satisfied

- ■ Very satisfied (5)
- ■ Fairly satisfied (4)
- ■ Neither satisfied or dissatisfied (3)
- ■ Fairly dissatisfied (2)
- ■ Very dissatisfied (1)
- ■ I don't know

How your complaint was handled
22-23 = 54%   **60%**
- 20%
- 39%
- 16%
- 12%
- 11%
- 2%

The resolution to your complaint
52%   **56%**
- 22%
- 34%
- 18%
- 11%
- 12%
- 2%

The time taken to resolve your complaint
51%   **52%**
- 18%
- 34%
- 23%
- 10%
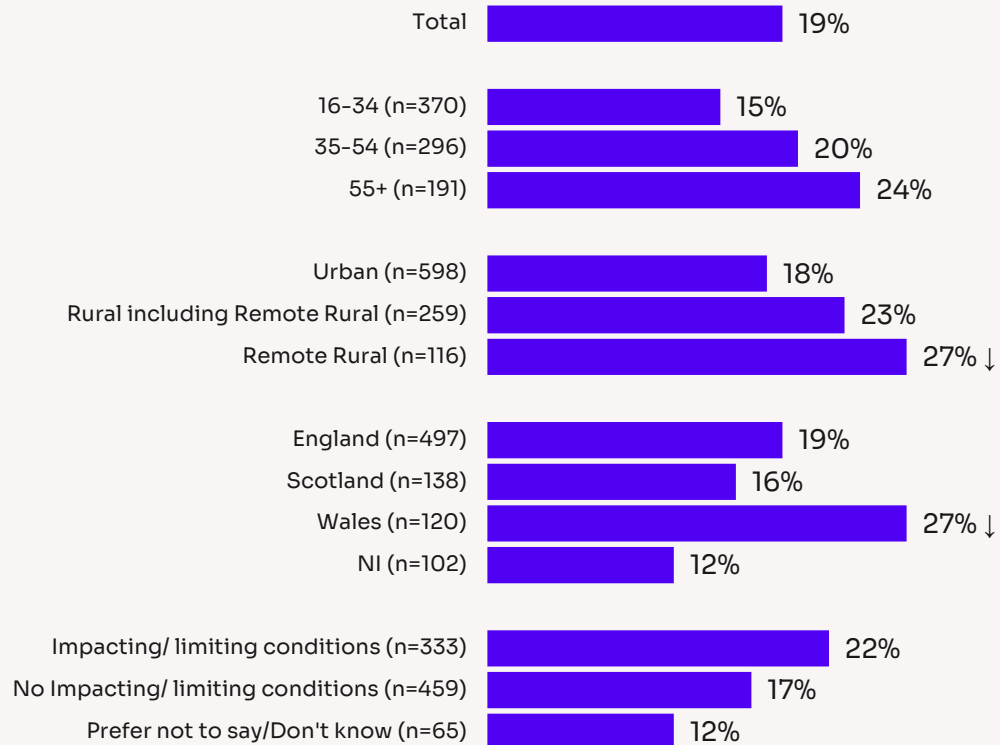- 13%
- 2%

Source: Residential Postal Tracker.

F4. (Old QH5) How easy or difficult did you find it to make a complaint about Royal Mail? F6. (Old QH7) Thinking of Royal Mail's response to your complaint, how satisfied were you with…
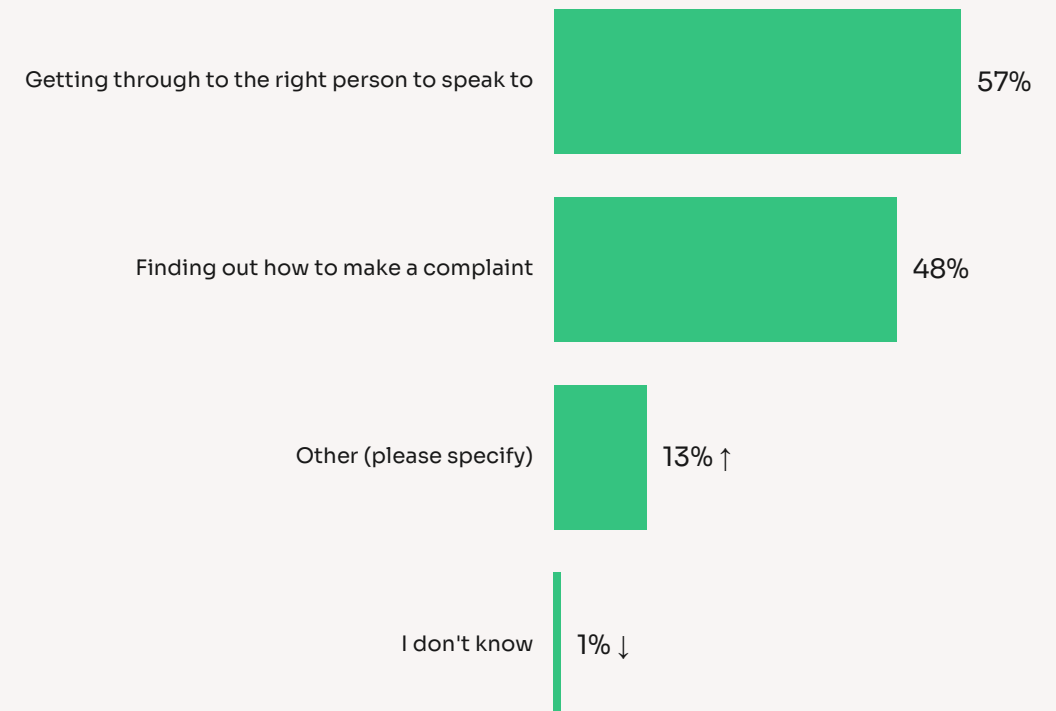
Base: Those who complained to Royal Mail (n=857).

Older individuals and those in rural areas are generally more likely to find it difficult to complain

Difficulties making complaints to the Royal Mail

% NET Difficult to complain

Category	Value
Total	19%
16-34 (n=370)	15%
35-54 (n=296)	20%
55+ (n=191)	24%
Urban (n=598)	18%
Rural including Remote Rural (n=259)	23%
Remote Rural (n=116)	27% ↓
England (n=497)	19%
Scotland (n=138)	16%
Wales (n=120)	27% ↓
NI (n=102)	12%
Impacting/ limiting conditions (n=333)	22%
No Impacting/ limiting conditions (n=459)	17%
Prefer not to say/Don't know (n=65)	12%

What was difficult?

| Category	Value
Getting through to the right person to speak to	57%
Finding out how to make a complaint	48%
Other (please specify)	13% ↑
I don't know	1% ↓

Source: Residential Postal Tracker.

F4. (Old Qh5) How easy or difficult did you find it to make a complaint about Royal Mail? F5. (Old QH6) What was difficult about making the complaint to Royal Mail?

Base: Those who complained to Royal Mail (n=857) Those who found it difficult to complain (n=170).
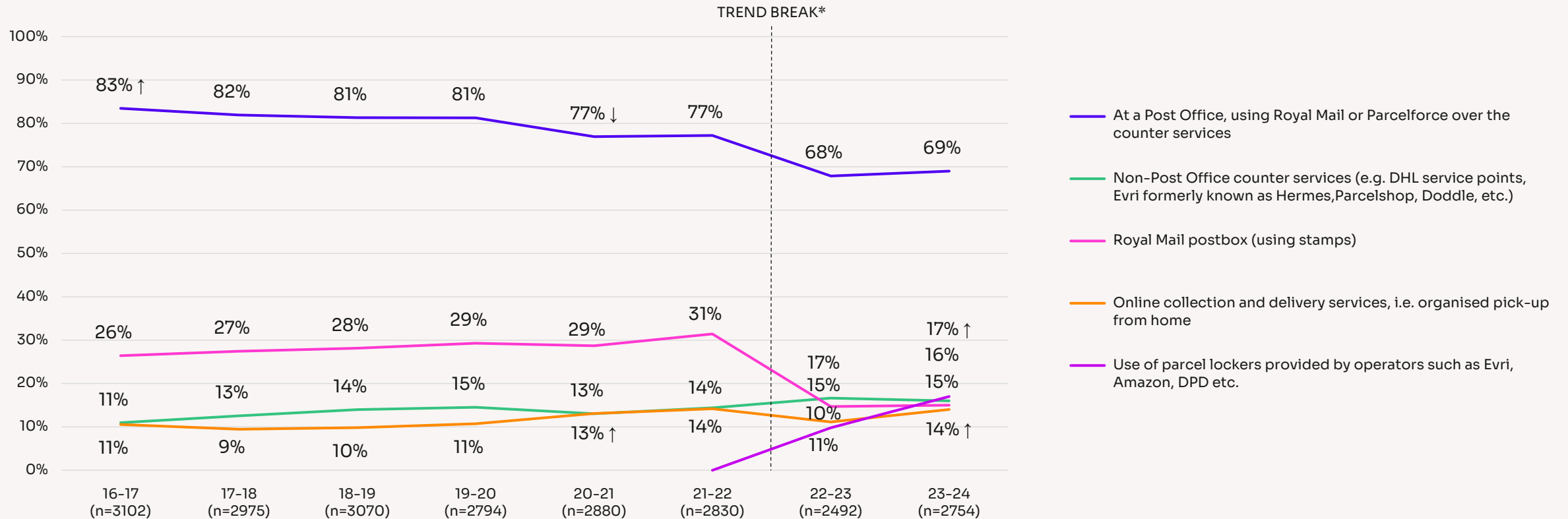
↑ ↓ Arrows denote significant positive or negative change vs previous time period.
Significance testing to 95%.

Parcel sending
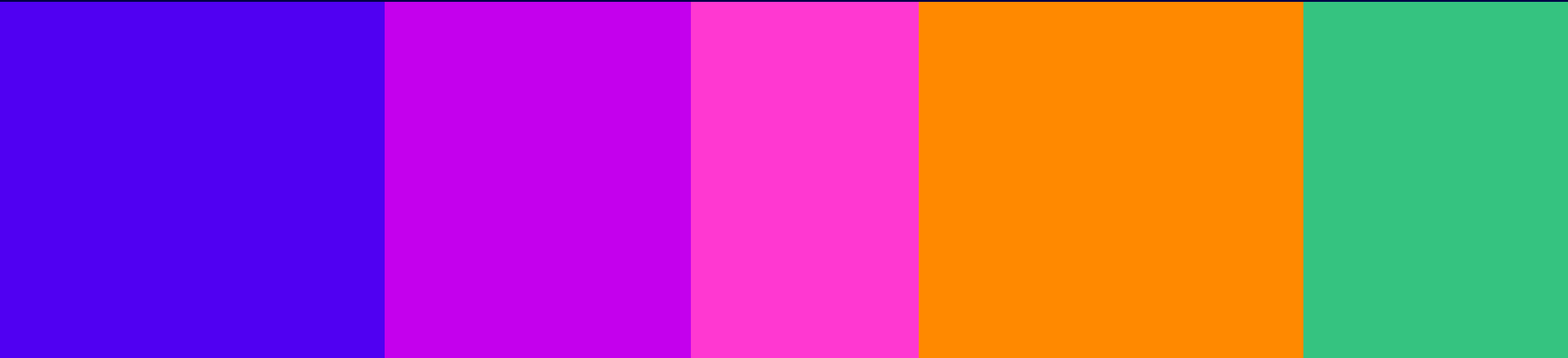
Whilst the Post Office remains the most common way to send parcels, use of parcel lockers and online collection and delivery services has significantly increased

How <u>parcels</u> were sent

TREND BREAK*

	At a Post Office, using Royal Mail or Parcelforce over the counter services
	Non-Post Office counter services (e.g. DHL service points, Evri formerly known as Hermes,Parcelshop, Doddle, etc.)
	Royal Mail postbox (using stamps)
	Online collection and delivery services, i.e. organised pick-up from home
	Use of parcel lockers provided by operators such as Evri, Amazon, DPD etc.

Note that in 2022-23 we included those sending items which need a signature/other important items.

Source: Residential Postal Tracker.

I3. (Old QD6) How did you send the parcels you've sent in the last month?

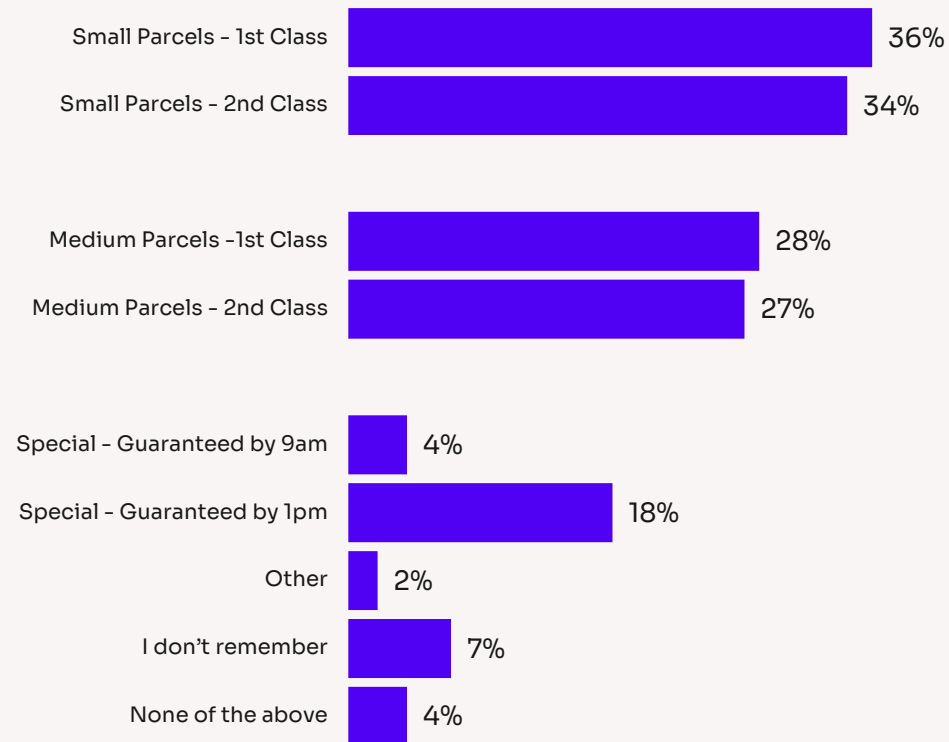Base: Those sending parcel post in the last month – Sample sizes shown on chart.

↑ ↓ Arrows denote significant positive or negative change vs previous time period.
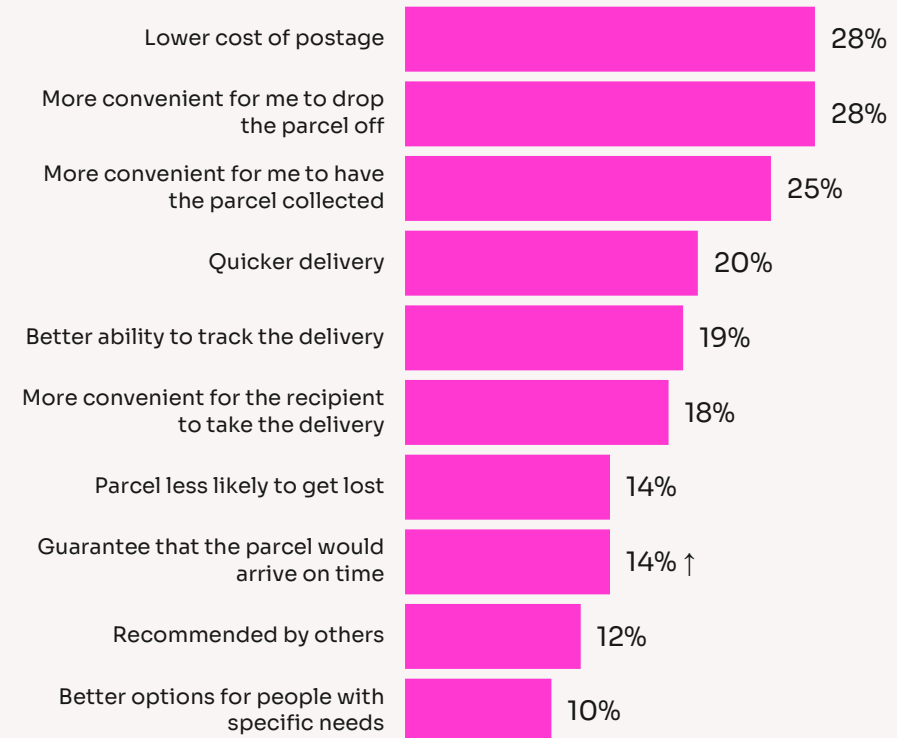
Significance testing to 95%.

Royal Mail users are similarly likely to have used 1st and 2nd Class options for sending parcels, while cost and convenience are the key drivers to alternatives

Parcel sending options

Royal Mail service used

Service	%
Small Parcels - 1st Class	36%
Small Parcels - 2nd Class	34%
Medium Parcels -1st Class	28%
Medium Parcels - 2nd Class	27%
Special - Guaranteed by 9am	4%
Special - Guaranteed by 1pm	18%
Other	2%
I don't remember	7%
None of the above	4%

Why chose a non-Royal Mail Provider (Showing Top 10 reasons)

| Reason	%
Lower cost of postage	28%
More convenient for me to drop the parcel off	28%
More convenient for me to have the parcel collected	25%
Quicker delivery	20%
Better ability to track the delivery	19%
More convenient for the recipient to take the delivery	18%
Parcel less likely to get lost	14%
Guarantee that the parcel would arrive on time	14% ↑
Recommended by others	12%
Better options for people with specific needs	10%

Source: Residential Postal Tracker.

I4. (Old QD9) Which, if any of these Royal Mail products have you used to send parcels in the last month? I5. (Old QD7) And why did you [SHOW ONLY IF CODES 1 OR 2 SELECTED AT I3 – sometimes] choose not to use a postbox or Royal Mail/Parcelforce over the counter services at a Post Office to send your parcel/s?

Base: Those sending parcel post by Royal Mail (n=2117) Those sending via other means (n=1016).
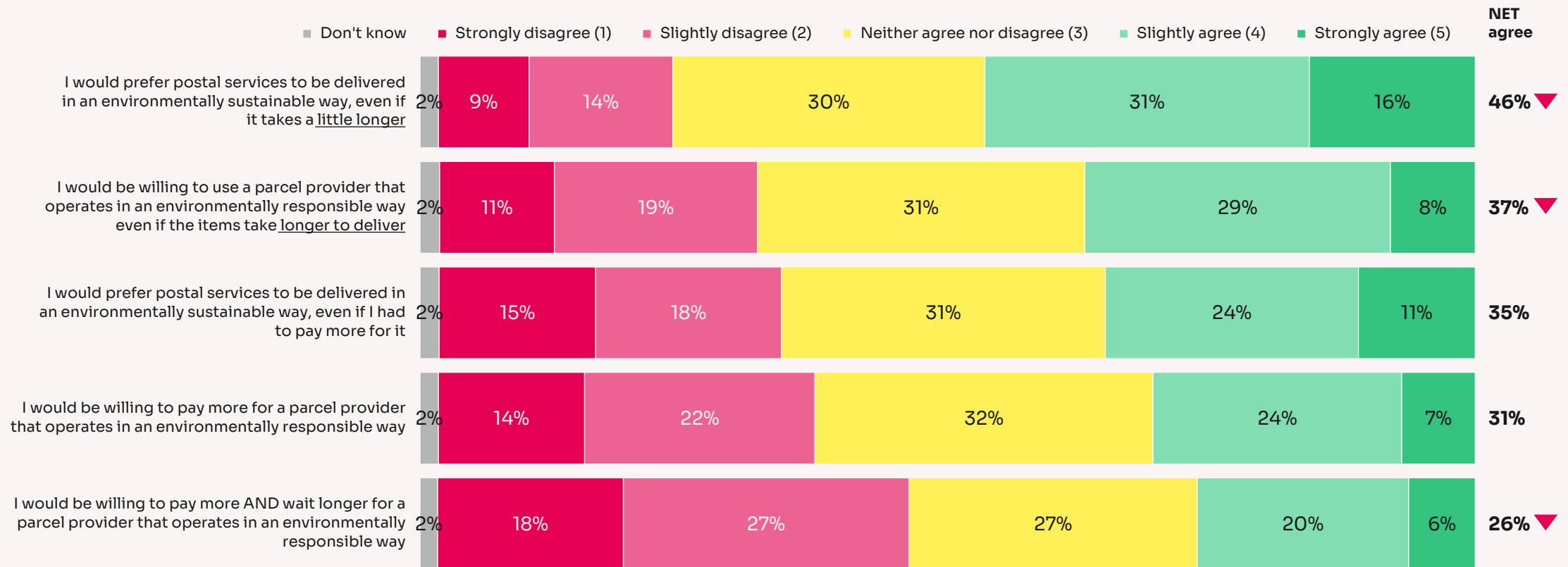
↑ ↓ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

Sustainability
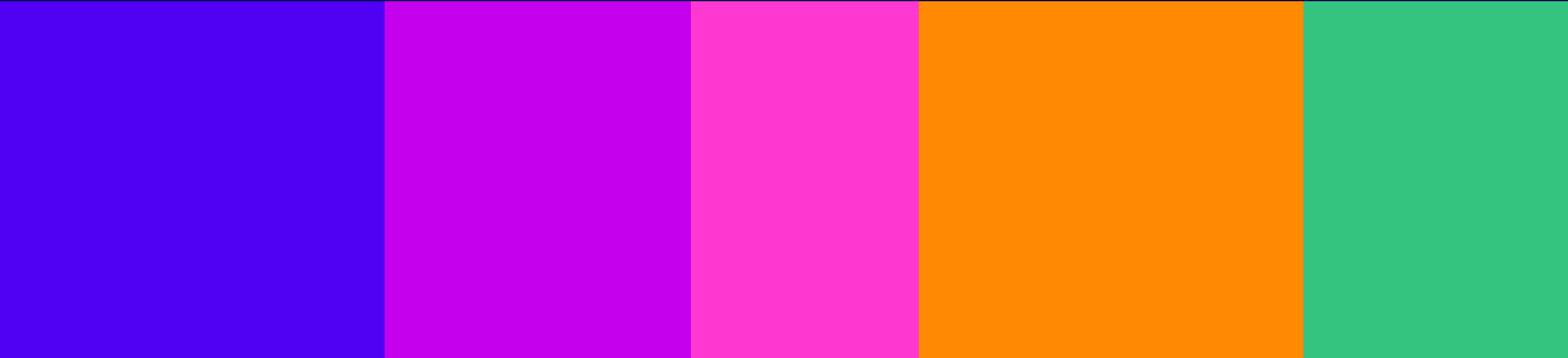
Postal users are more willing to compromise on service speed than on cost for more sustainable delivery, though this has declined year on year

Attitudes towards environmental sustainability

	Don't know	Strongly disagree (1)	Slightly disagree (2)	Neither agree nor disagree (3)	Slightly agree (4)	Strongly agree (5)	**NET agree**
I would prefer postal services to be delivered in an environmentally sustainable way, even if it takes a <u>little longer</u>	2%	9%	14%	30%	31%	16%	**46%** ▼
I would be willing to use a parcel provider that operates in an environmentally responsible way even if the items take <u>longer to deliver</u>	2%	11%	19%	31%	29%	8%	**37%** ▼
I would prefer postal services to be delivered in an environmentally sustainable way, even if I had to pay more for it	2%	15%	18%	31%	24%	11%	**35%**
I would be willing to pay more for a parcel provider that operates in an environmentally responsible way	2%	14%	22%	32%	24%	7%	**31%**
I would be willing to pay more AND wait longer for a parcel provider that operates in an environmentally responsible way	2%	18%	27%	27%	20%	6%	**26%** ▼

Method note: Online more likely to say they are willing to pay.

Source: Residential Postal Tracker.

C3. Here are some statements that other people have made about sending and receiving post. To what extent do you agree or disagree with each one? I7. How much do you agree or disagree with the following statements...

Base: All participants 2023-24 (n=6160).

▲▼ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.