Residential Postal Tracker – Annual Report

Produced by: Jigsaw Research

Fieldwork: July 2024 – June 2025

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 survey of postal users.

80% of completed interviews are conducted online and 20% are completed face-to-face via Computer Assisted Personal Interviewing (CAPI).

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

Data is then weighted back to be nationally representative.

Due to the Covid-19 pandemic, face to face interviewing was paused 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

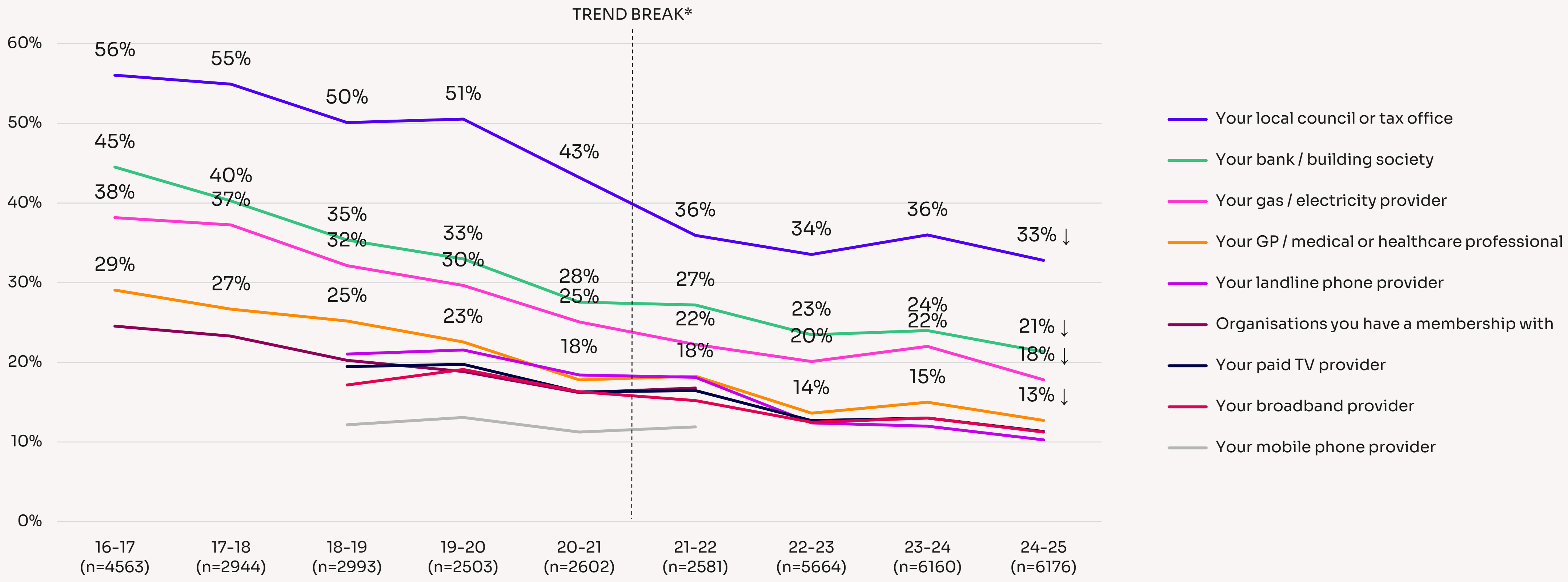
This document reports on yearly trends for data captured between July and June.

Specifically, the report calls out significant changes between the year “July 2024 – June 2025” and the previous reporting period “July 2023 – June 2024”.

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

Preferences for receiving post return to the long-term trend of decline for organisations postal users have a relationship with

Contact preferences – Post



**Trend break: Question was restructured in July 22, so use trends as context only.*

Note: that in Jan 25 "Social media (e.g. Facebook, X, etc)" was changed to be "Mobile App (e.g. banking app notifications or social media)"
Declines in Post Preference are most prevalent in Apr-Jun 25 so are unlikely to be caused by methodology

Source: Residential Postal Tracker.

C2_1. Which method would you prefer to receive communications from…

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

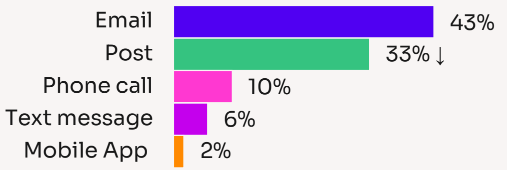
↑↓ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

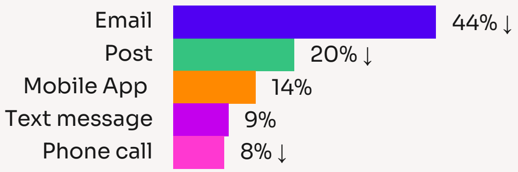
Email remains the preferred method of contact for all non-family relationships apart from GPs where a third prefer a phone call. Post is preferred over Mobile Apps for bank/building society communication despite how readily available banking apps are nowadays

Contact preferences – Preferred channel hierarchy

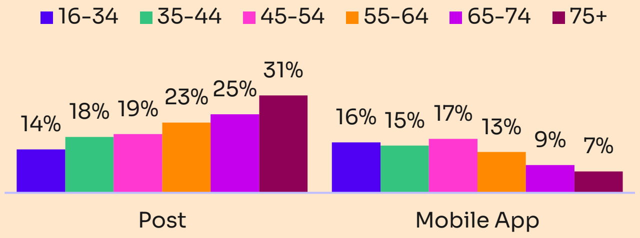
Your local council or tax office



Your bank/building society

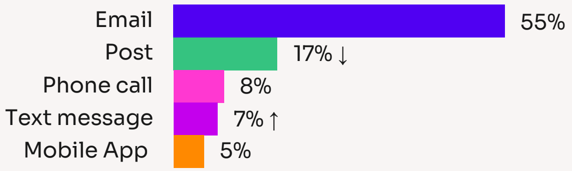


Your bank/building society – Post vs Mobile App

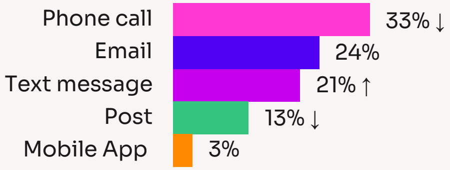


Research by the FCA suggests that 78% of UK adults with day-to-day bank accounts use banking apps. This falls to 61% among 65-74 and 27% among 75+ [Financial Lives 2024: Key findings from the FCA's Financial Lives May 2024 survey]

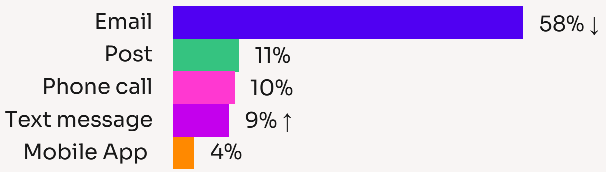
Your gas/electricity provider



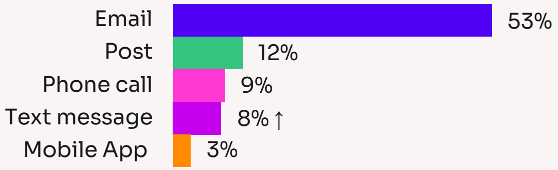
Your GP/medical or healthcare professional



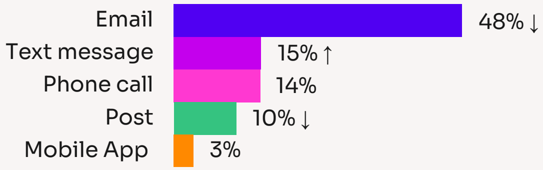
Your broadband provider



Your paid TV provider



Your landline/mobile phone provider



Source: Residential Postal Tracker.

C2_1. Which method would you prefer to receive communications from...

Base: Due to questionnaire change in Jan 25, this data has been split by Jan-Jun 25 time period for fair comparison.

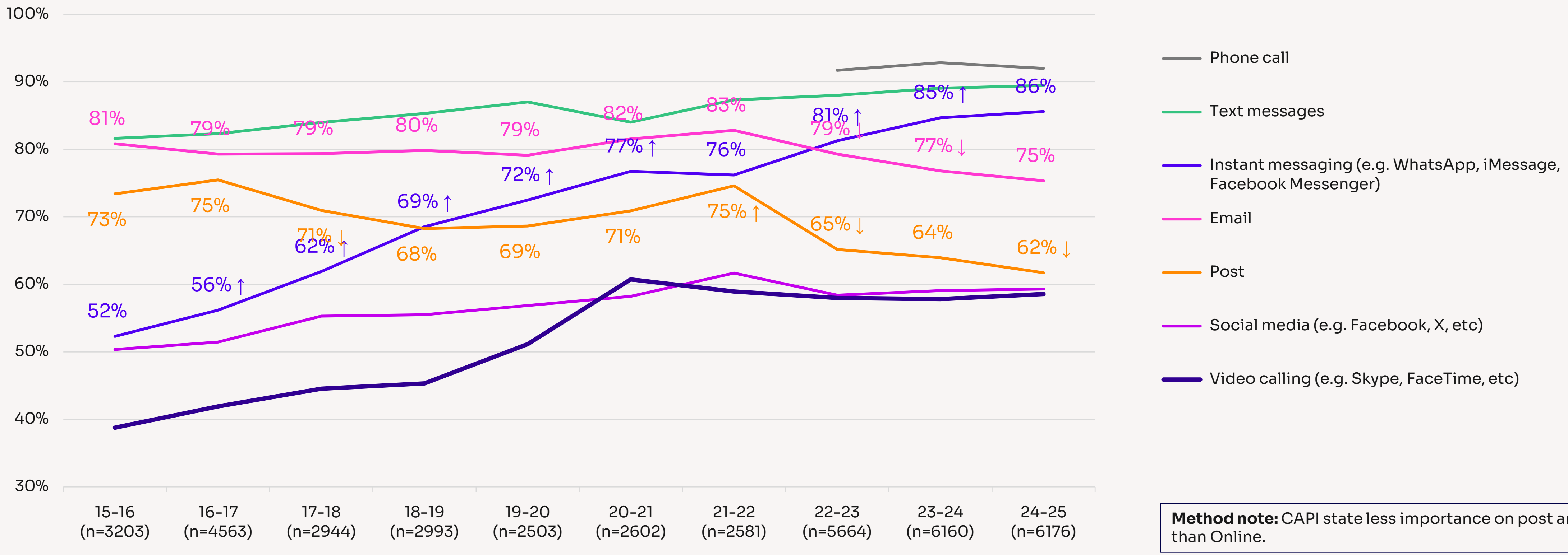
All participants in Jan-Jun 25 (n=3086)

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

Significance testing to 95%.

Instant messaging continues to increase over the longer term – now nearly as important as traditional text. Post and email have seen a continued decline since 21-22

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



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?

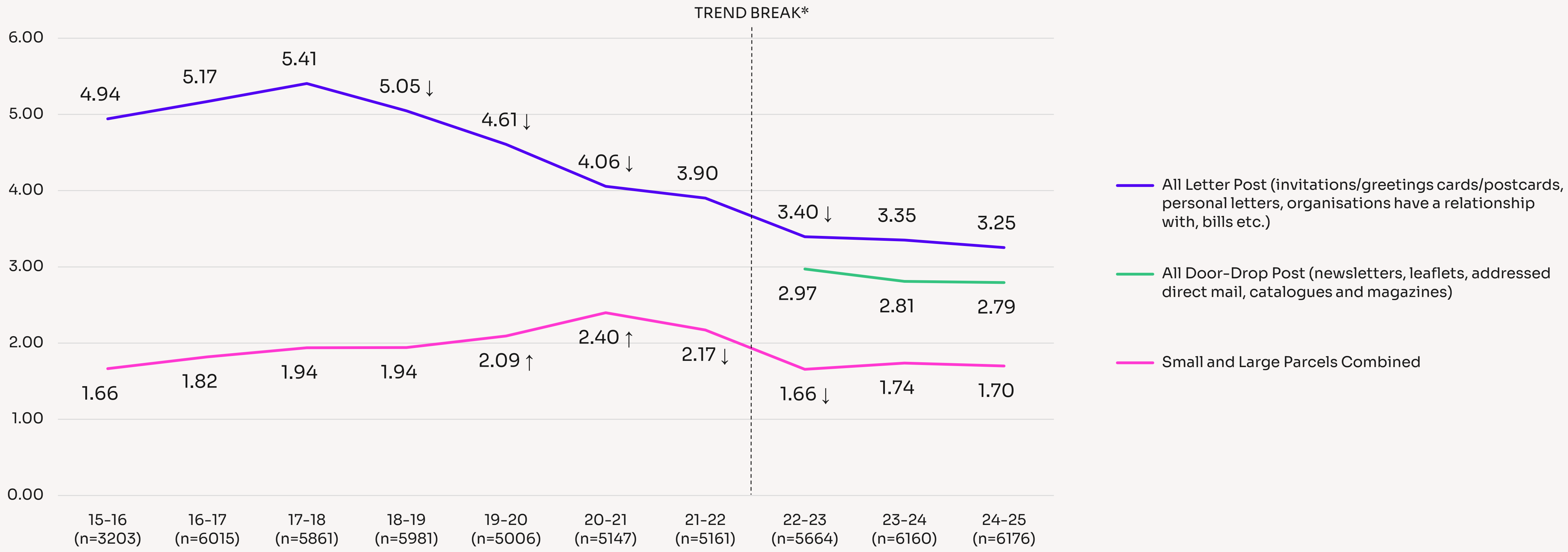
Base: All participants (on even months) – Sample size shown on chart.

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

Significance testing to 95%.

Claimed receipt of both Letter post and Door Drop post continues a slow downward trend

Claimed post received in the last week



**Note that 'door drop post' was added in 22-23 so the "All Post" figure is not comparable to previous waves.*

Source: Residential Postal Tracker.

E1. Approximately how many of the following have you personally received in the last week through the post?

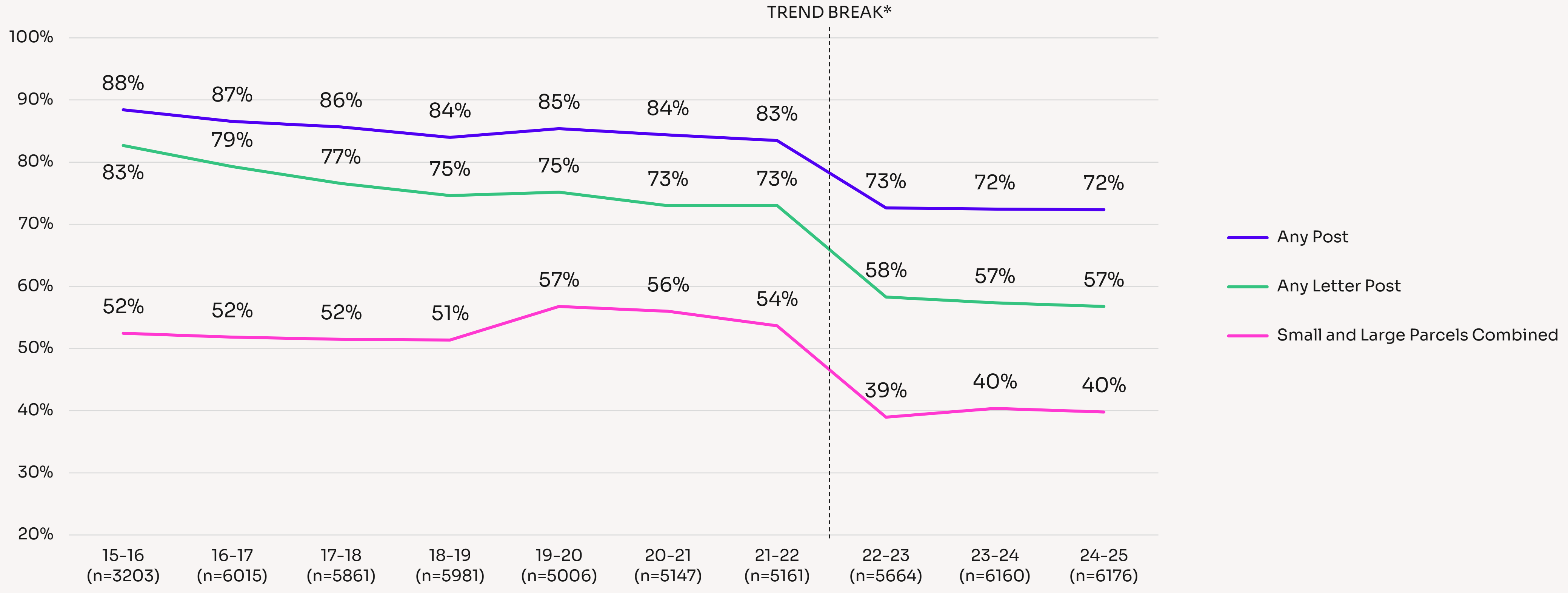
Base: All participants – Sample size shown on chart.

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

Significance testing to 95%.

Despite post as a channel having lower claimed importance when communicating with friends and family, the incidence of those claiming to send post over the last month has remained largely stable over the last 3 years

Claimed incidence of sending any post in the last month (summary)



**Note that drop off occurs during the period in which the questionnaire was restructured so may partially be caused by survey differences*

Source: Residential Postal Tracker.

G1 (old QD1). Approximately how many of the following have you sent in the last month?

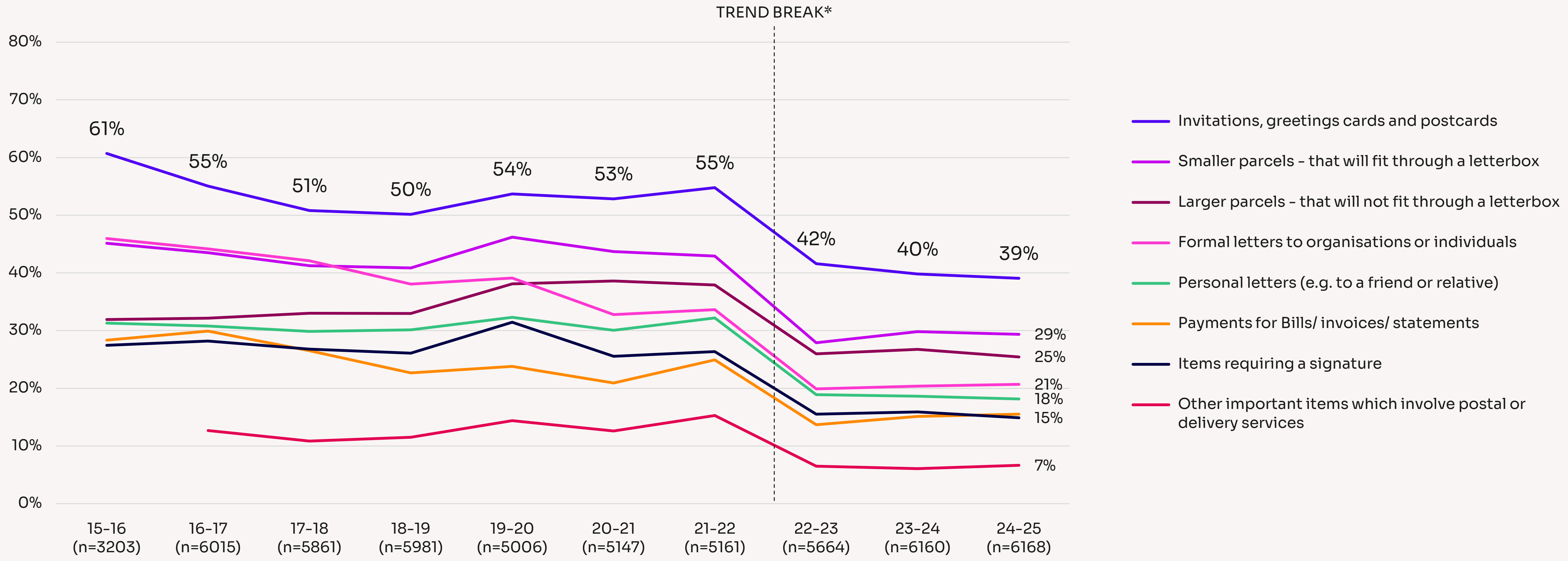
Base: All participants – Sample size shown on chart.

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

Significance testing to 95%.

Claimed incidence of post sent in the last month is similar year on year across all post types measured

Claimed incidence of sending any post in the last month (summary)



Note that drop off occurs during the period in which the questionnaire was restructured so may partially be caused by survey differences.

Source: Residential Postal Tracker.

G1 (old QD1). Approximately how many of the following have you sent in the last month?

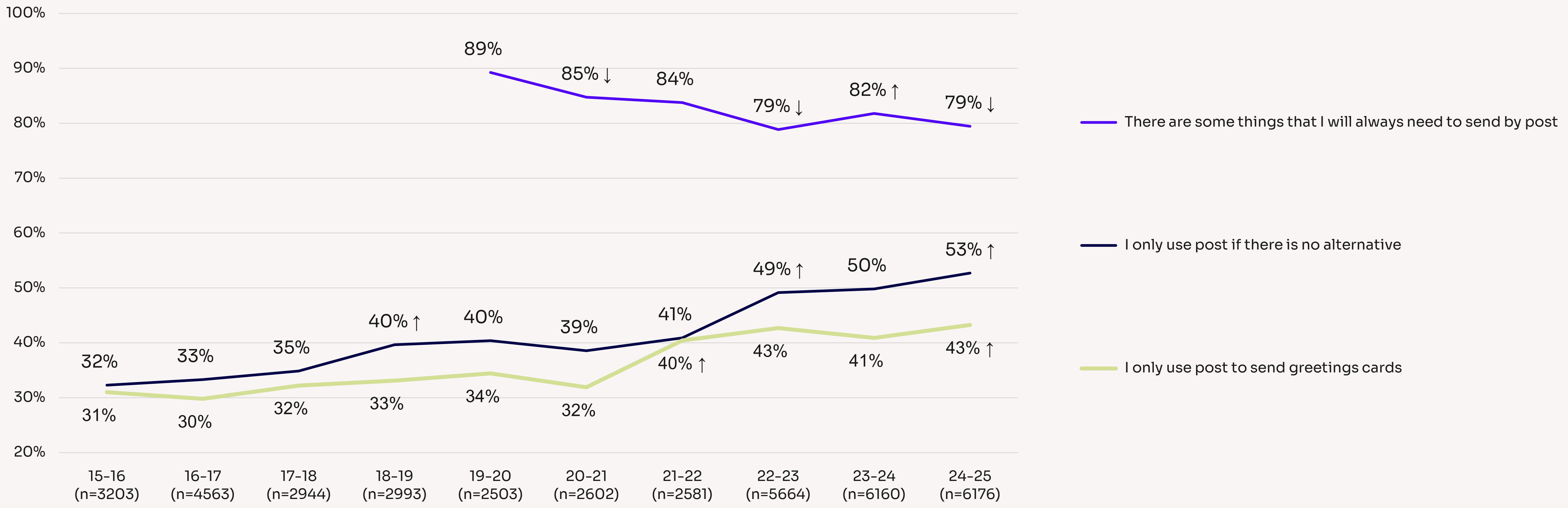
Base: All participants – Sample size shown on chart.

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

Significance testing to 95%.

There is widespread recognition that there will always be things that need to be sent by post, but there continues to be an increase in those who claim to be sending less post, and those only sending when there is no alternative

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



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? – NET Agree.

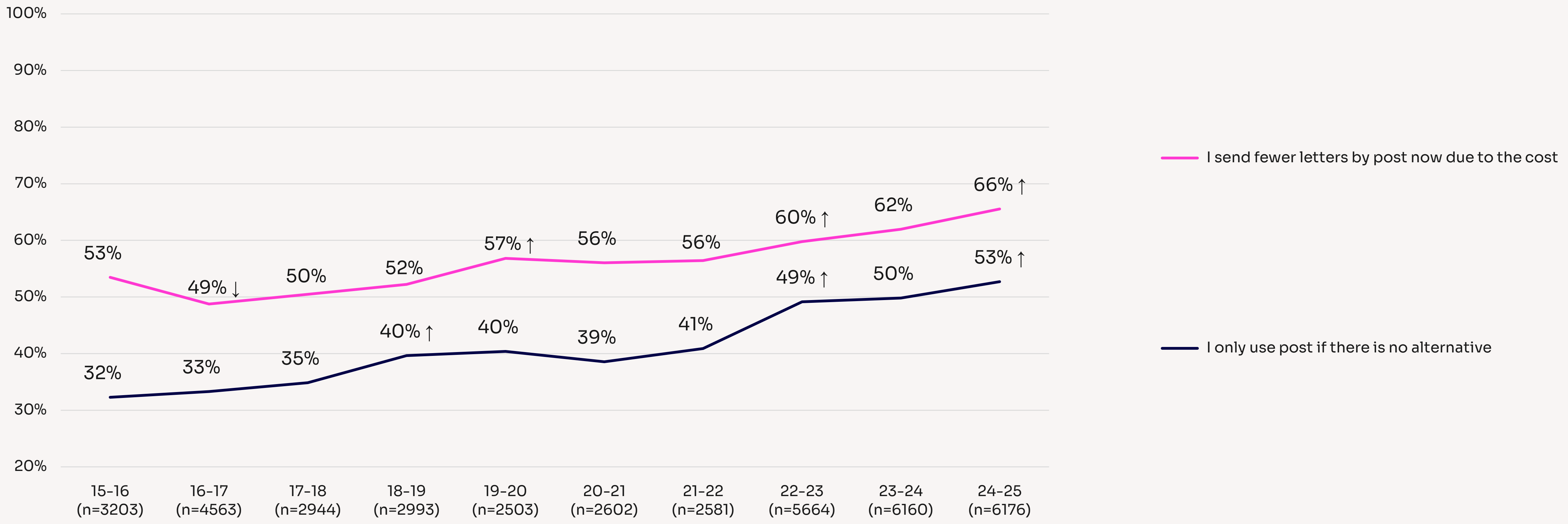
Base: All participants (on even months) – Sample size shown on chart.

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

Significance testing to 95%.

Increases in those only sending when there is no alternative are mirrored by an increase in those sending fewer letters now due to cost

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



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? – NET Agree.

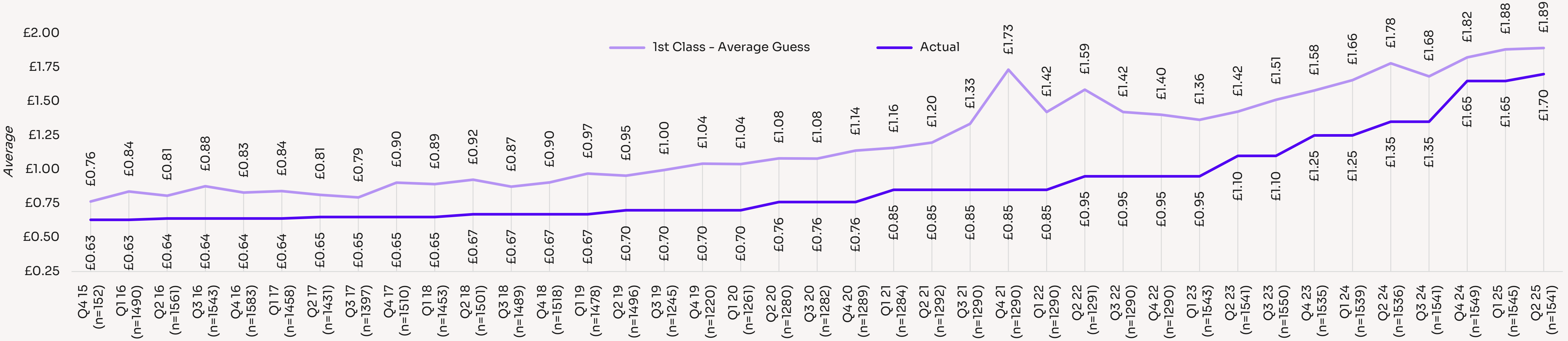
Base: All participants (on even months) – Sample size shown on chart.

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

Significance testing to 95%.

The average estimated cost of a 1st Class stamp has risen to £1.89 in the most recent quarter, remaining above the actual price point of £1.70

Estimated cost of a 1st class stamp



% difference in 1st class perceived vs actual

Source: Residential Postal Tracker.

H3. (Old QF2) Giving your best guess, how much do you think a first class stamp for a standard letter costs today?

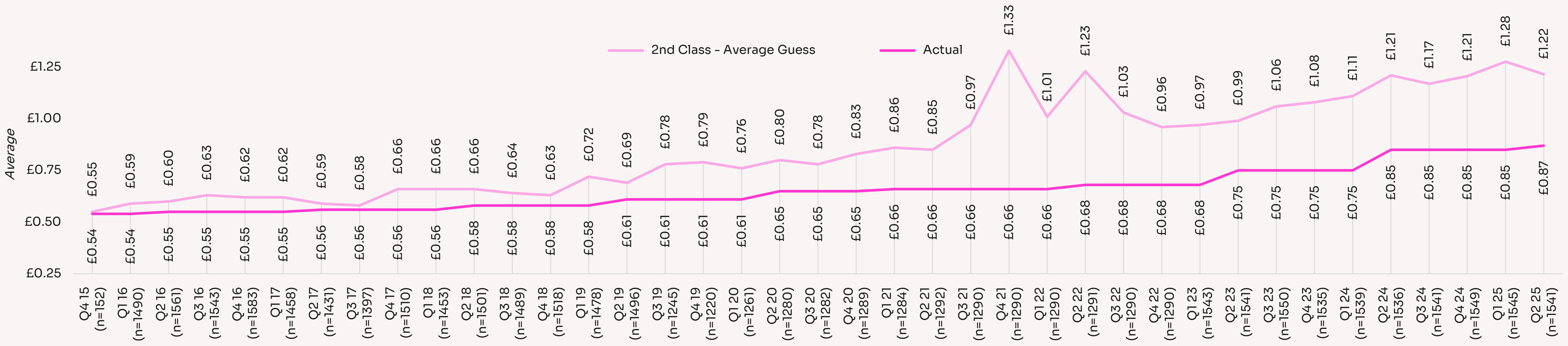
Base: All participants – Sample size shown on chart.

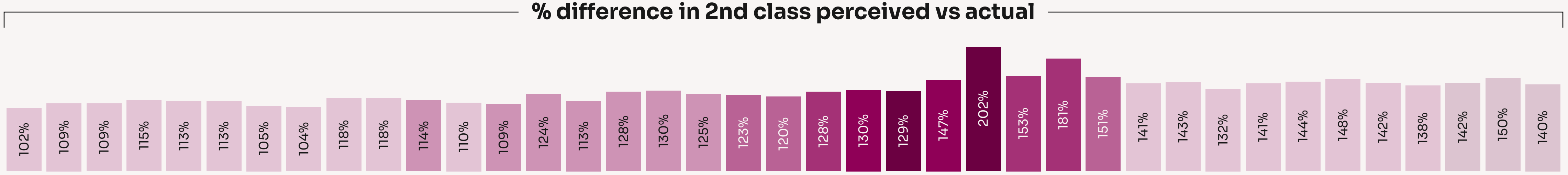
↑↓ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

Meanwhile, the average estimated cost of a 2nd Class stamp is now £1.22. The gap between estimated and actual cost of 2nd Class is now higher than for 1st Class

Estimated cost of a 2nd class stamp





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?

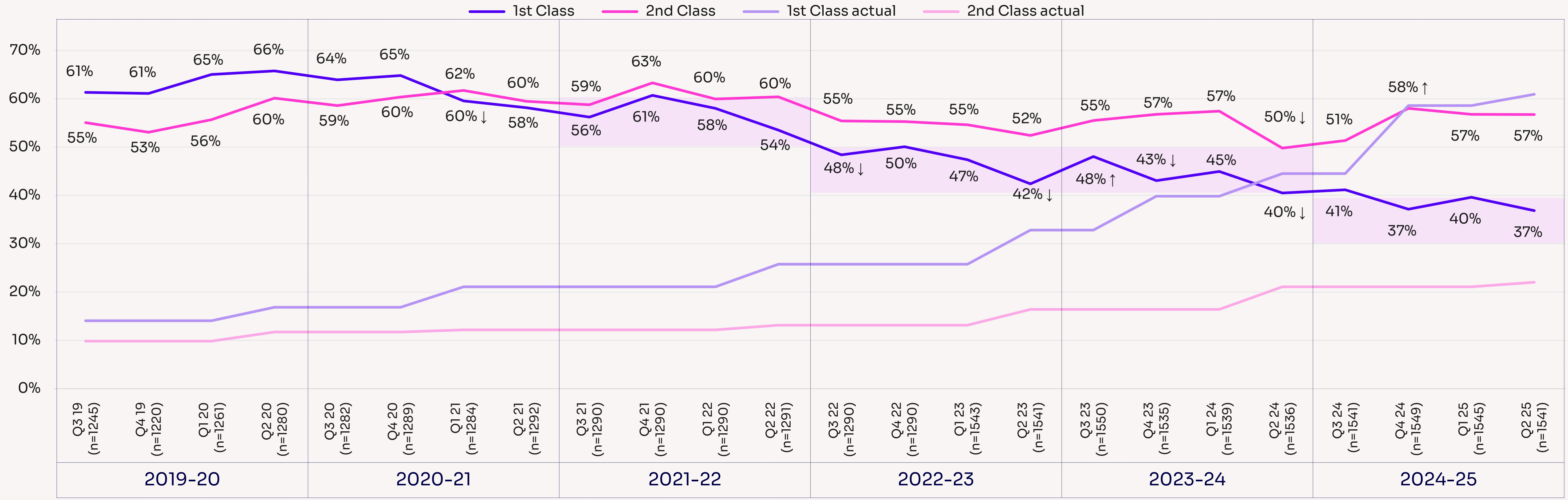
Base: All participants – Sample size shown on chart.

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

Significance testing to 95%.

As 1st class stamp prices continues to increase, perceived value for money continues to decrease now at 39% for the 2024-25 period

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?

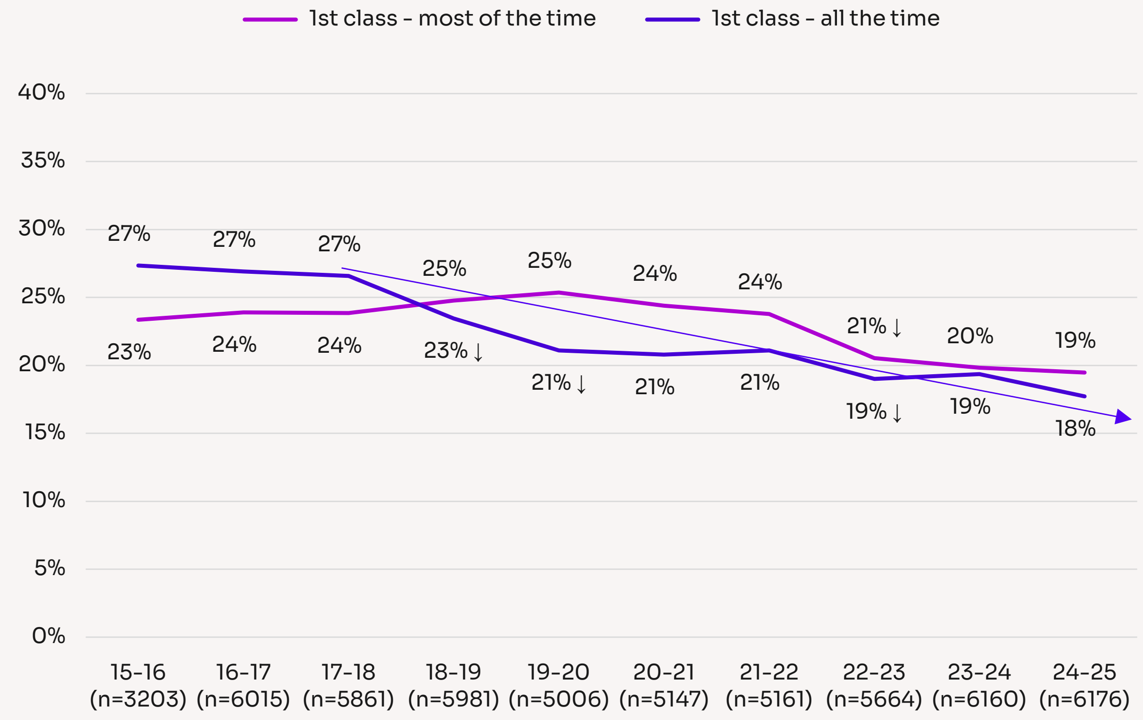
Base: All participants – Sample size shown on chart.

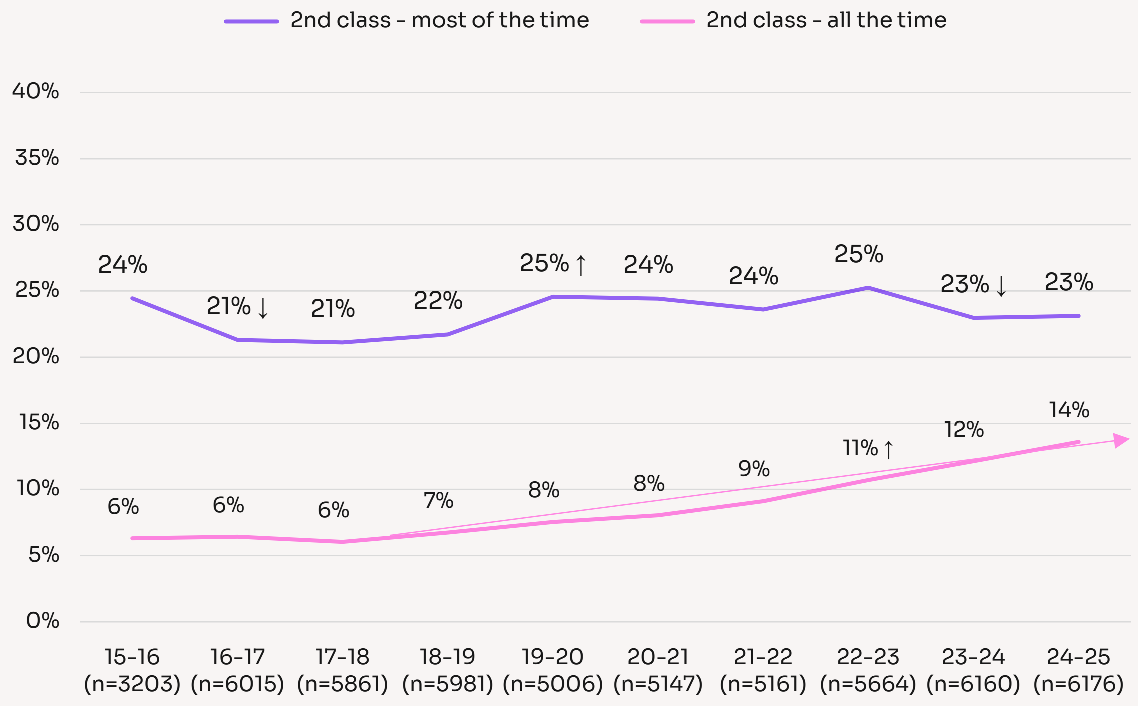
↑↓ Arrows denote significant positive or negative change vs previous time period.

Significance testing to 95%.

As 1st class stamp prices have increased, there appears to be a trend of switching away from using 1st class all or most of the time to an increase in using 2nd class

Services used when sending letters or cards





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?

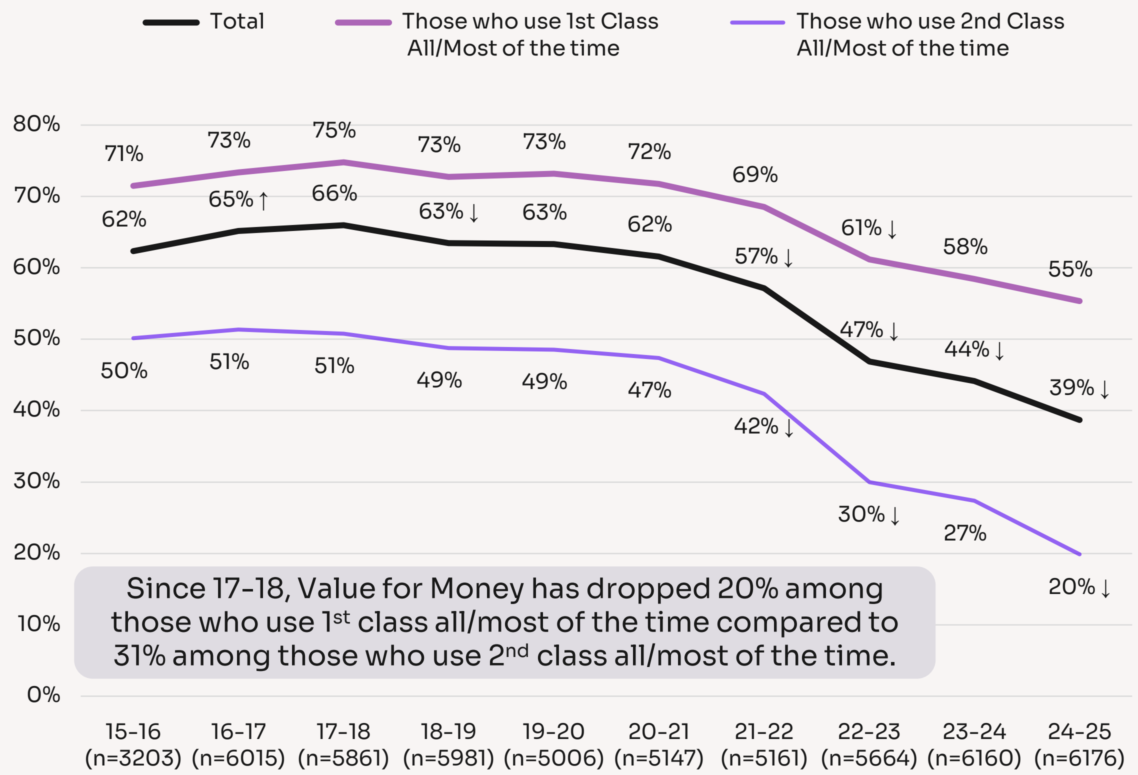
Base: All participants – Sample size shown on chart.

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

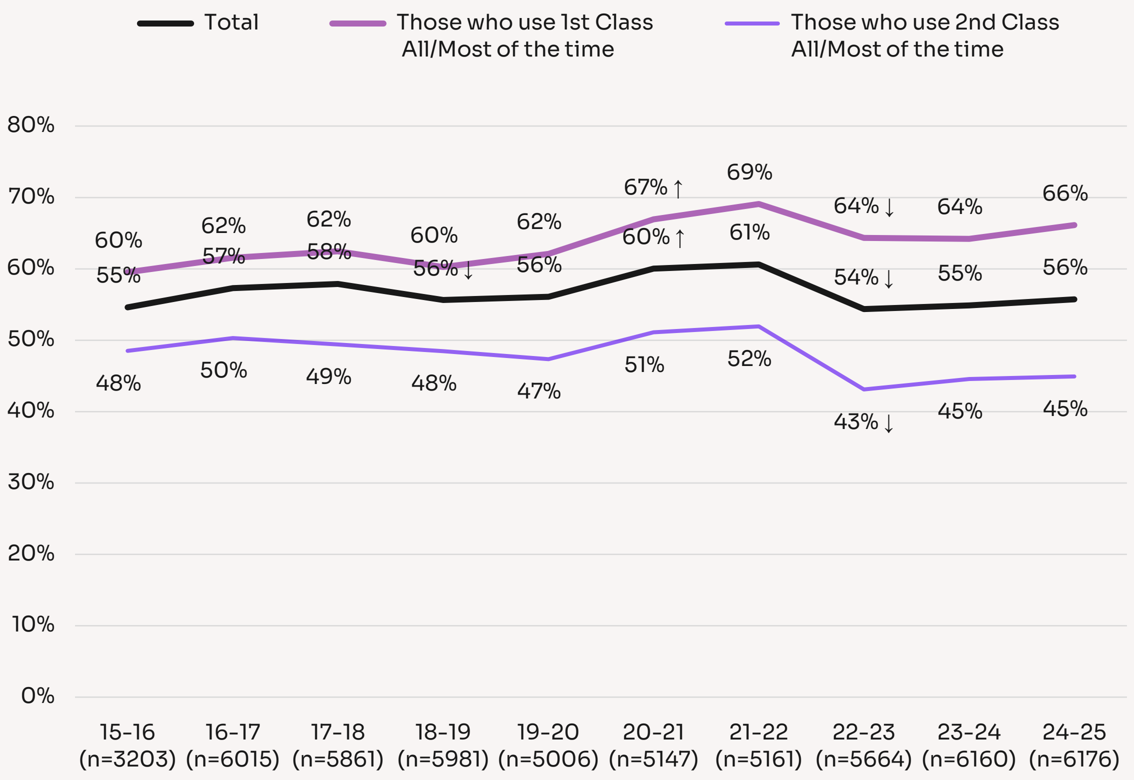
Significance testing to 95%.

Those who use 2nd Class all or most of the time have always had lower perception of value for money of 1st Class, with these perceptions falling quicker than regular 1st Class users

Value for Money of 1st Class (NET Good Value for Money)



Value for Money of 2nd Class (NET Good Value for Money)



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? 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.

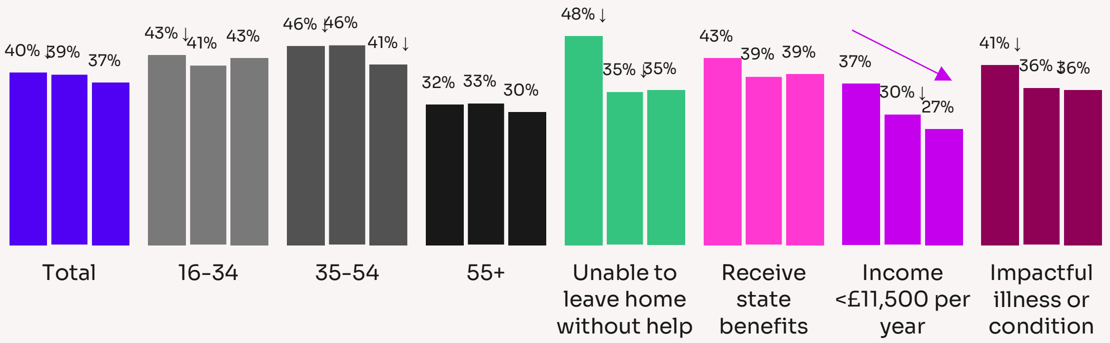
Significance testing to 95%.

Those with household incomes under £11,500 per year are most likely to have reduced their 1st Class usage over time while seeing a rise in 2nd Class usage. At the same time, perceptions of 2nd Class being good value for money are on a downward trend for this group

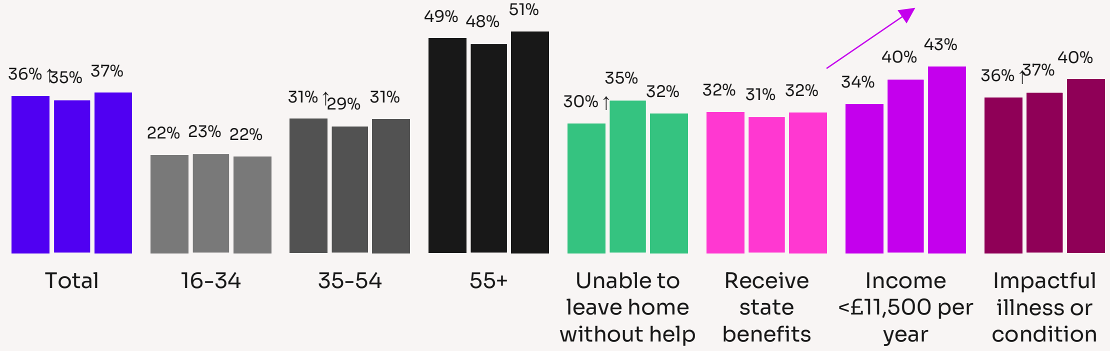
Services used when sending letters or cards

Data split by year | 22-23 | 23-24 | 24-25 |

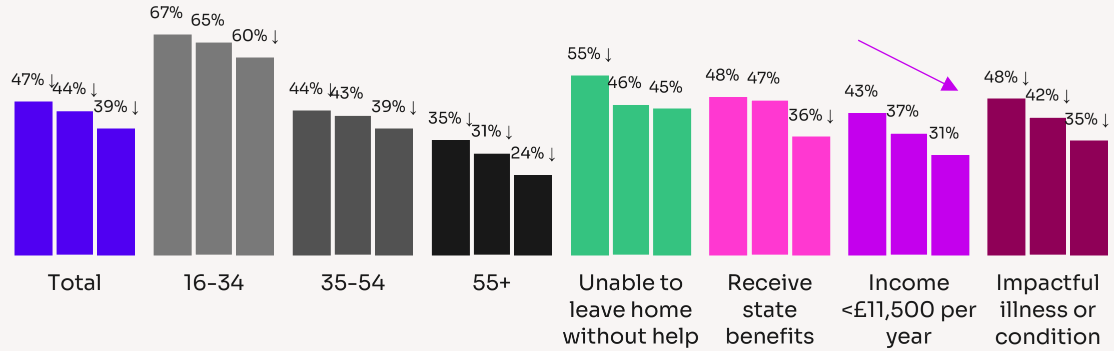
Sent via 1st Class all or most of the time



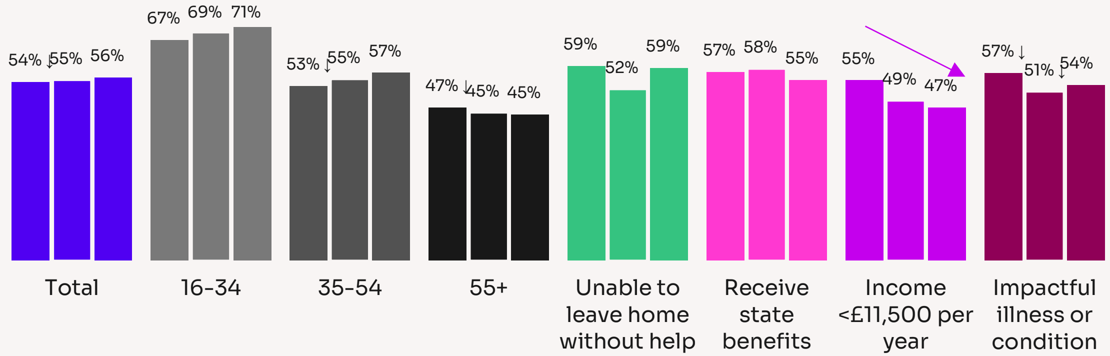
Sent via 2nd Class all or most of the time



Value for Money of 1st Class (NET Good Value for Money)



Value for Money of 2nd Class (NET Good Value for Money)



Source: Residential Postal Tracker.

H8. (Old QF7) When sending letters or cards, which service do you tend to use? 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 24-25 (n=6176). Base: I am unable to leave home without help (n=524), Base: Receive state benefits (n=1215), Base: Income <£11,600 pa (n=508), Base: Have illness or condition which impacts daily activities (n=1815)

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

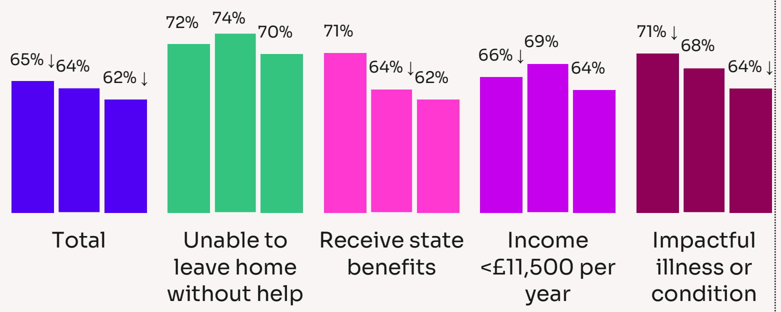
Significance testing to 95%.

Those with a household income under £11,500 have the lowest perception of 1st class being good value for money while showing an upward trend of reducing the letters and cards they send

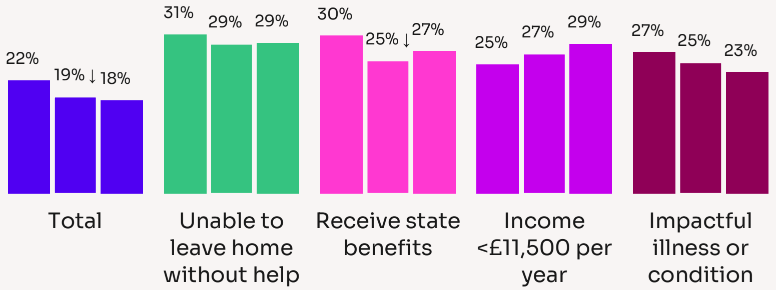
Vulnerable groups

Data split by year | 22-23 | 23-24 | 24-25 |

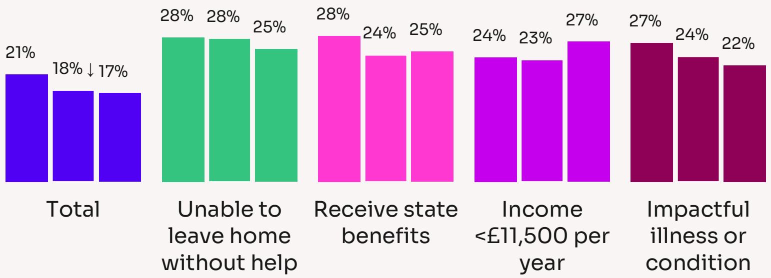
Importance of post when communicating with friends & family (Net Important)



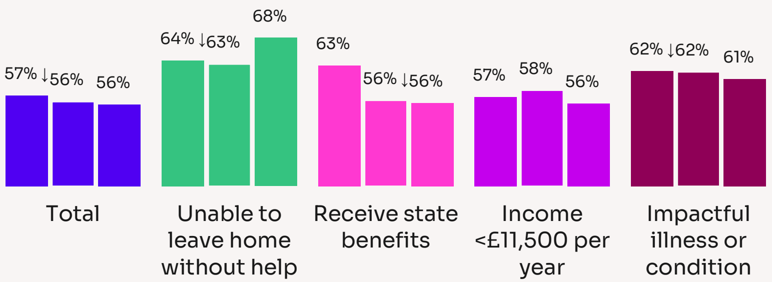
Reduce the number of <u>letters and cards</u> you send so that you can afford essentials



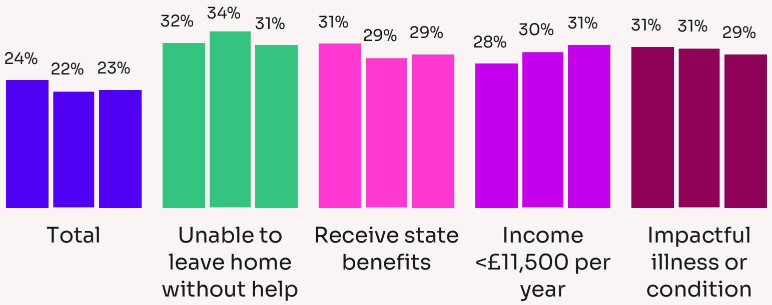
Reduce the number of <u>parcels</u> you send so that you can afford essentials



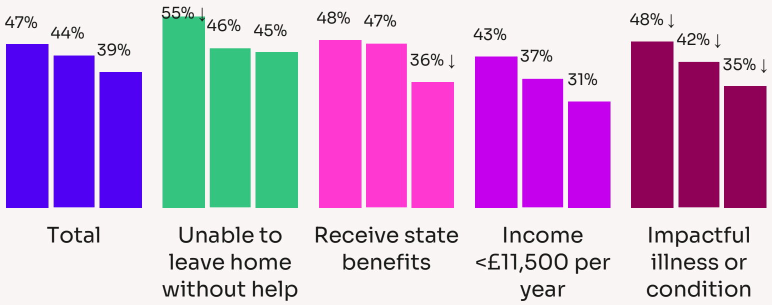
Would feel cut off from society if I couldn't send or receive post (Net Agree)



Reduce the number of <u>letters and cards you send by 1st class post</u> so that you can afford essentials



<u>1st Class</u> Value for money (NET Good)



Source: Residential Postal Tracker.

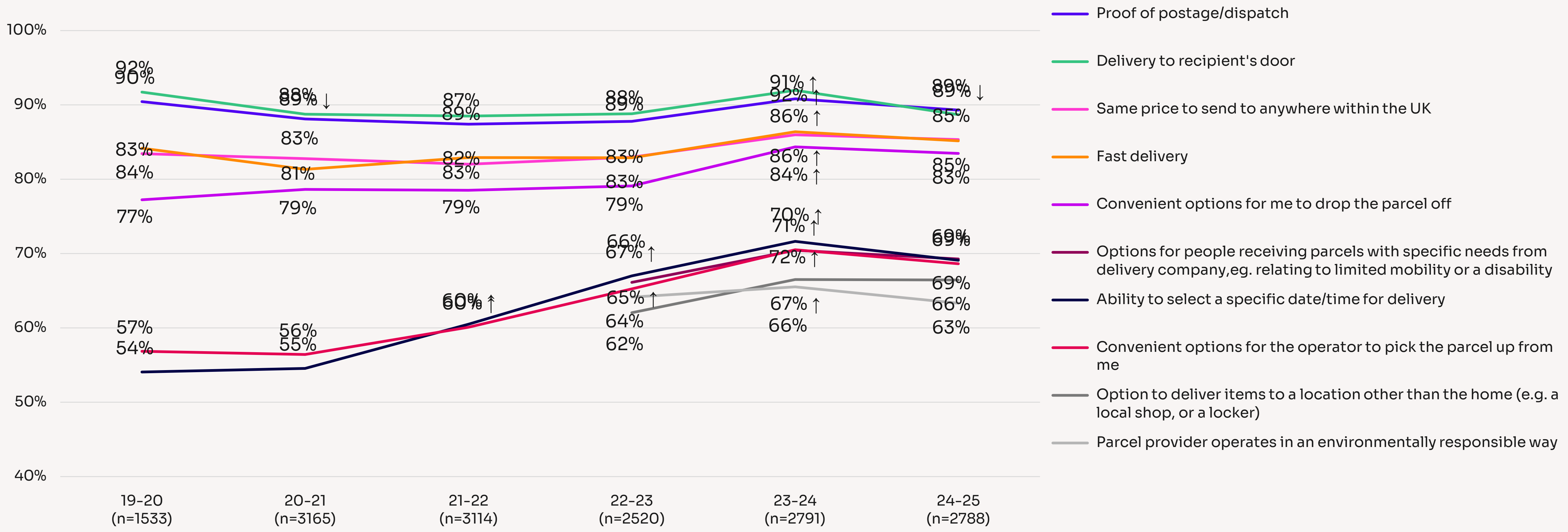
C4. Thinking about how you communicate with friends and family, how important to you are each of these channels of communication? G2_. In the last three months have you had to... G2b_. In the last three months have you had to ... Base: All participants 24-25 (n=6176). Base: I am unable to leave home without help (n=524), Base: Receive state benefits (n=1215), Base: Income <£11,600 pa (n=508), Base: Have illness or condition which impacts daily activities (n=1815)

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

Significance testing to 95%.

Most factors have now plateaued at their importance level after some significant increases last year

Importance of factors when sending parcels (NET important)



Method note: CAPI likely to score HIGHER importance across all metrics.

Source: Residential Postal Tracker.

I6. (Old QD10a) Below, is a list of factors people tell us they consider when sending parcels – NET Important.

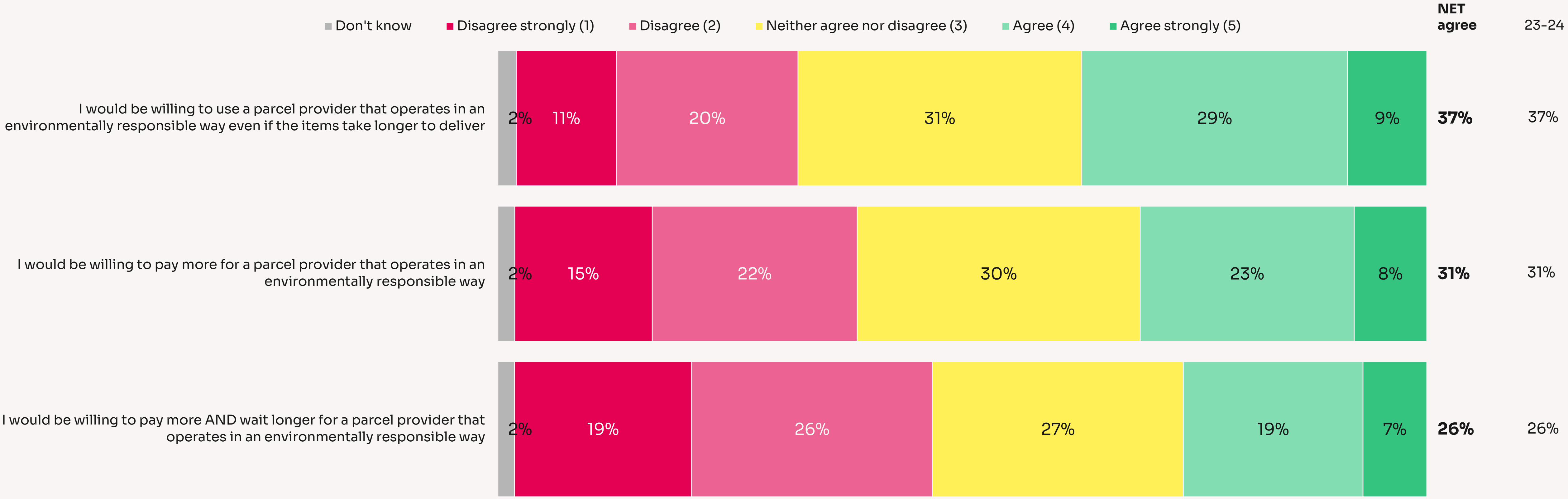
Base: All parcel senders – sample size shown on chart.

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

Significance testing to 95%.

Postal users are more willing to compromise on service quality than on cost for sustainable delivery – this is unmoved compared to 23-24

Willingness to pay more for more sustainable services



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

Source: Residential Postal Tracker.

I7. How much do you agree or disagree with the following statements…

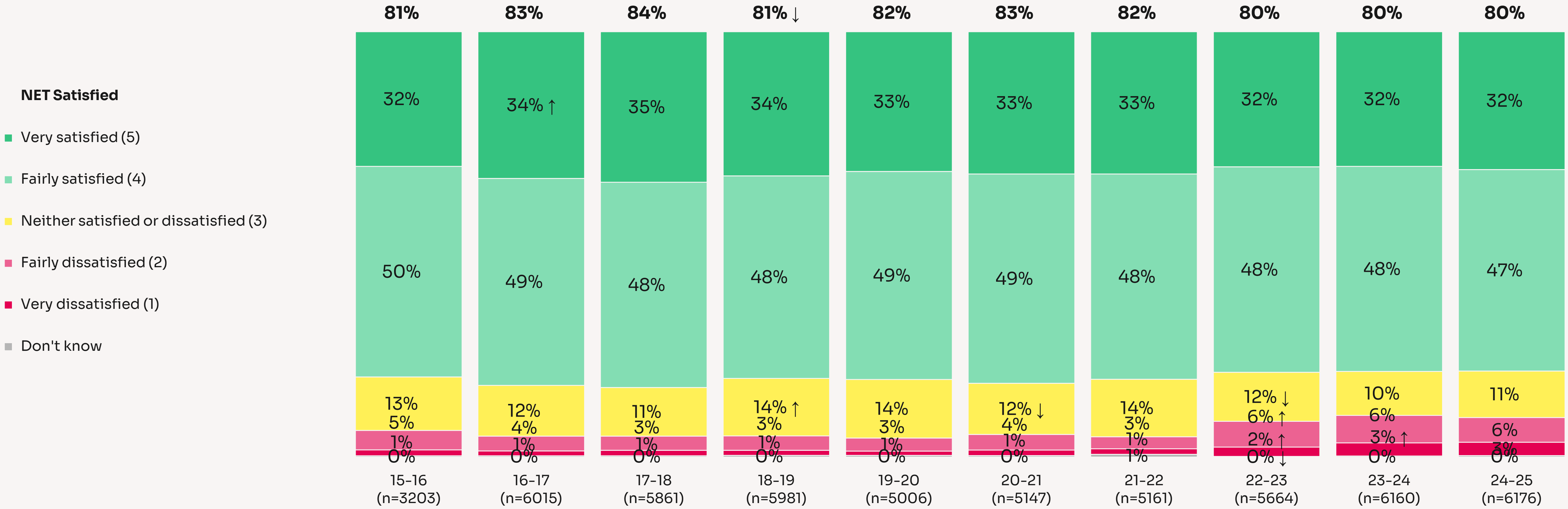
Base: All participants 2024-25 (n=6176).

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

Significance testing to 95%.

Overall satisfaction with Royal Mail has continued to remain high over time, but there is still a small minority who have been dissatisfied over the last 3 years

Overall satisfaction with the Royal Mail



Source: Residential Postal Tracker.

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

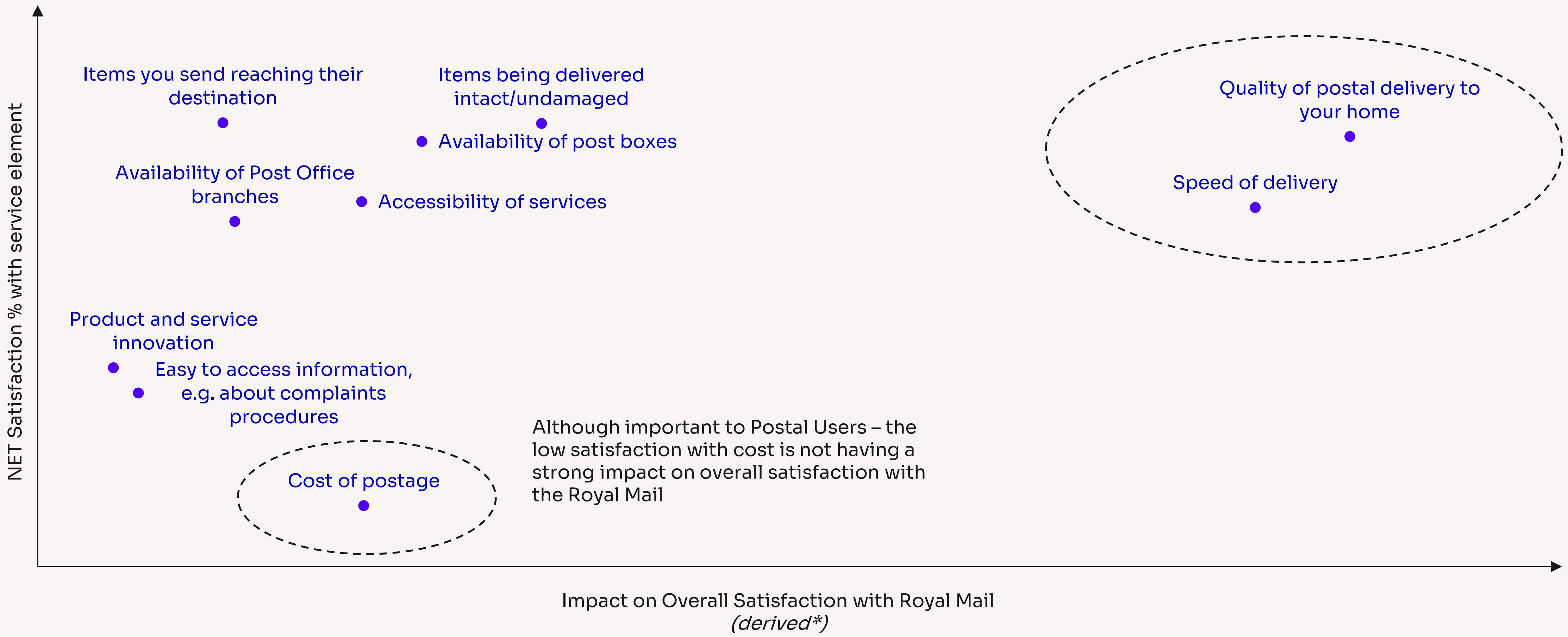
Base: All participants – Sample size shown on chart.

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

Significance testing to 95%.

Quality and Speed are strong drivers of overall Royal Mail satisfaction.
If postal users are dissatisfied with these, they are more likely to be dissatisfied overall

Derived impact of Royal Mail's service elements



Source: Residential Postal Tracker.

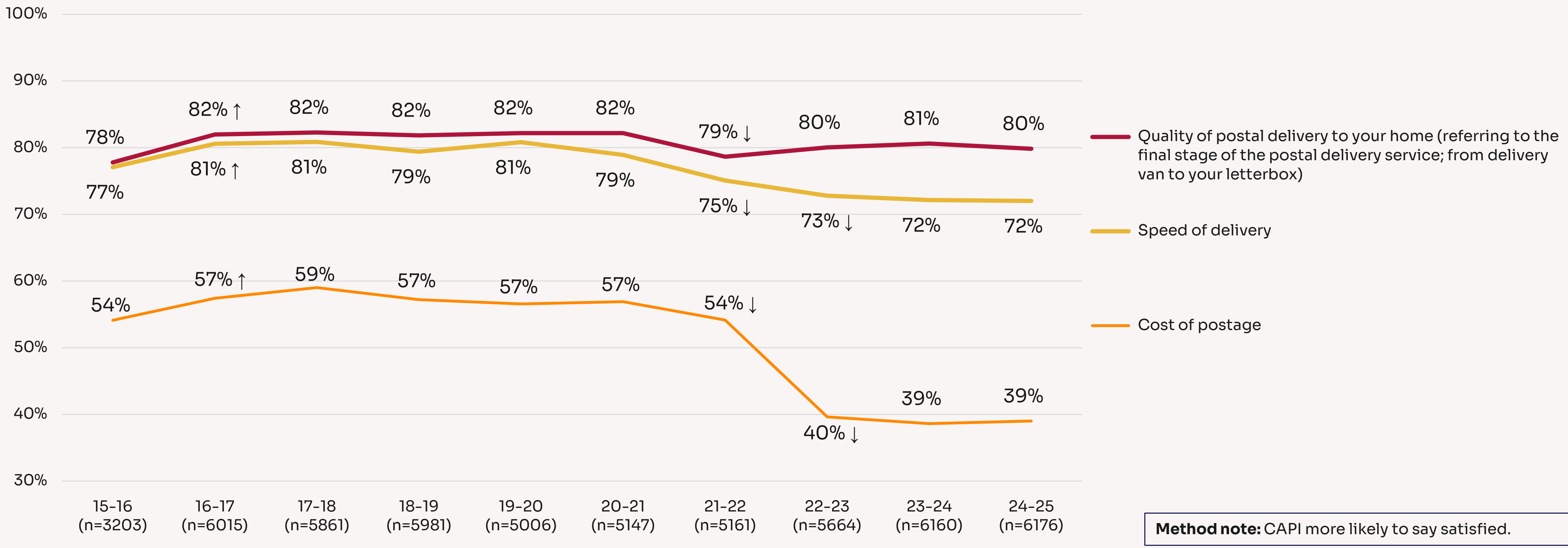
D3. (Old QG3) How satisfied are you with the following aspects of Royal Mail's service?

Base: All participants 2024-25 (n=6176).

*Derived analysis conducted using Relative Importance Analysis of Satisfaction with Royal Mail vs Satisfaction with Service elements

Satisfaction with the cost of Royal Mail services remains at an all-time low. Satisfaction with other service elements remain consistent over the last 3 years

Satisfaction with Royal Mail's service elements



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?

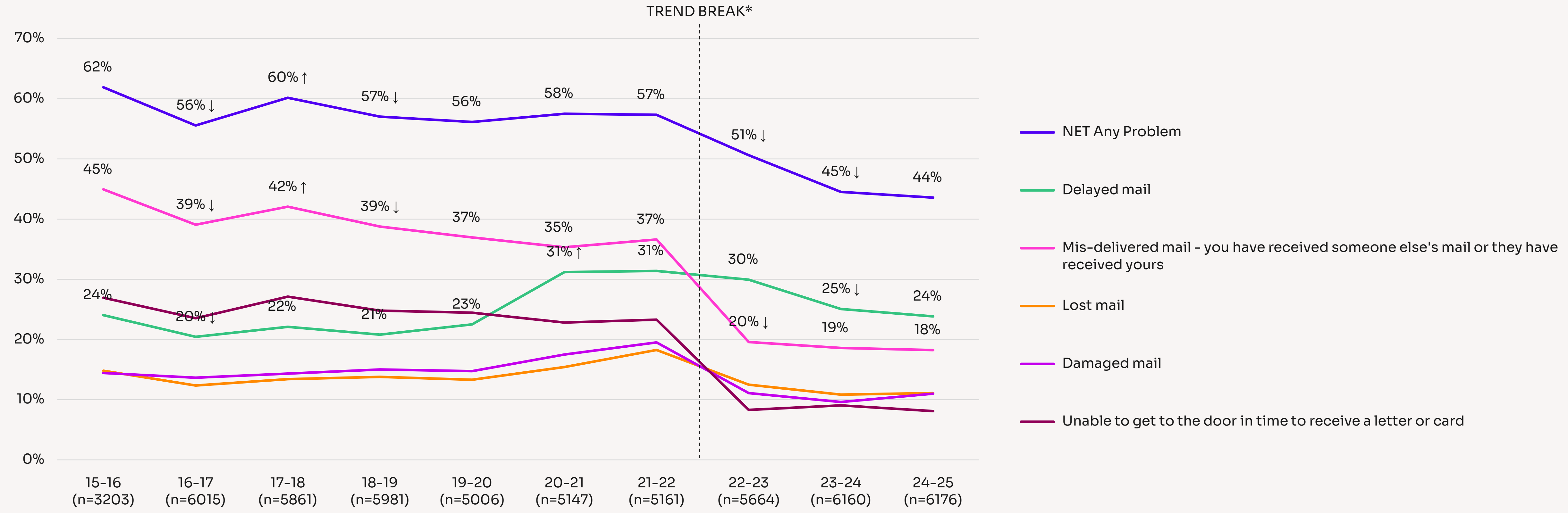
Base: All participants – Sample size shown on chart.

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

Significance testing to 95%.

Overall incidence and types of problems encountered remain consistent with last year and significantly lower than in 22-23

Problems encountered



**Note that this question changed from being both Parcels and Letters to just a Letter context. Historic trends not comparable. Question format also changed from Yes/No/Don't know for each problem to a simple multicide.*

Method note: Online more likely to experience issues.

Source: Residential Postal Tracker.

F1. In the last 12 months, have you experienced any of the following problems when sending or receiving letters or cards from the Royal Mail?

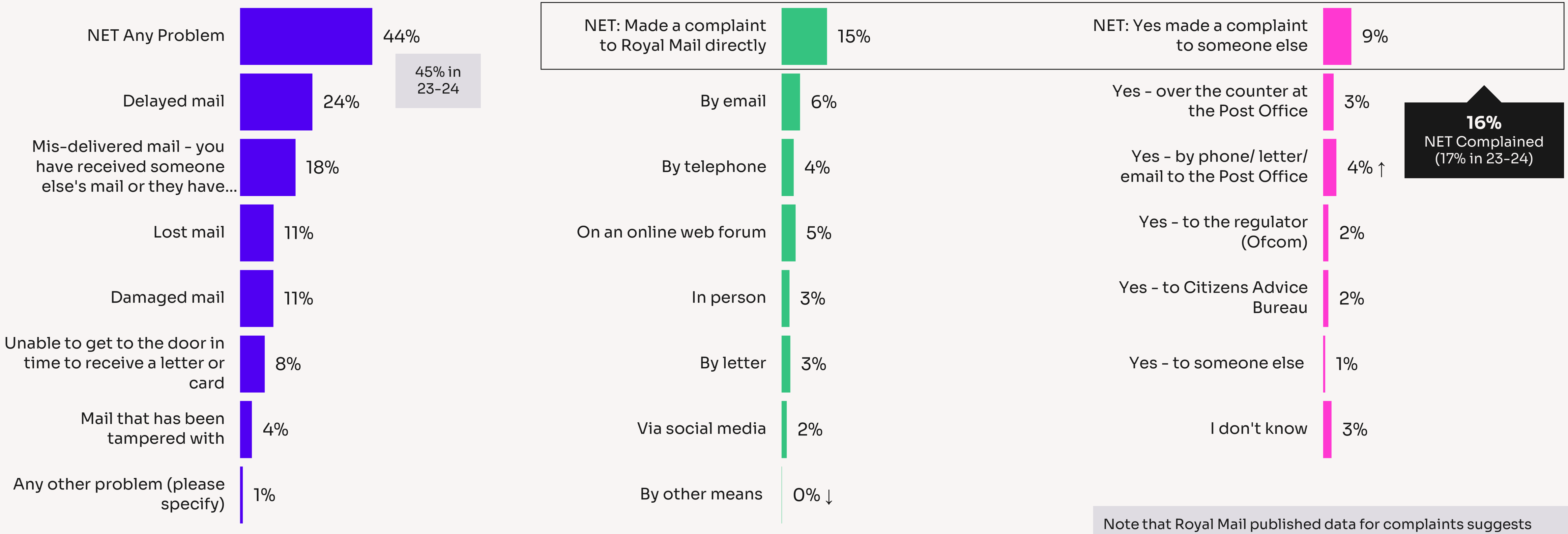
Base: All participants – Sample size shown on chart.

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

Significance testing to 95%.

Under half of postal users claim to have experienced a problem with Royal Mail with 16% going on to make a complaint via any means

Incidence of problems and complaints with the Royal Mail – among all postal users



Method note: Online more likely to experience issues.

Note that Royal Mail published data for complaints suggests complaints rose to 2.6m between Apr23-Mar24.
Data is yet to be published for 24-25.

Source: Residential Postal Tracker.

F1. In the last 12 months, have you experienced any of the following problems when sending or receiving letters or cards from the Royal Mail? F2. And in the last 12 months, have you made a complaint directly to Royal Mail about any letters or cards you've sent or received? F8. In the last 12 months, have you made a complaint to anyone else about any letters or cards you've sent or received from the Royal Mail?

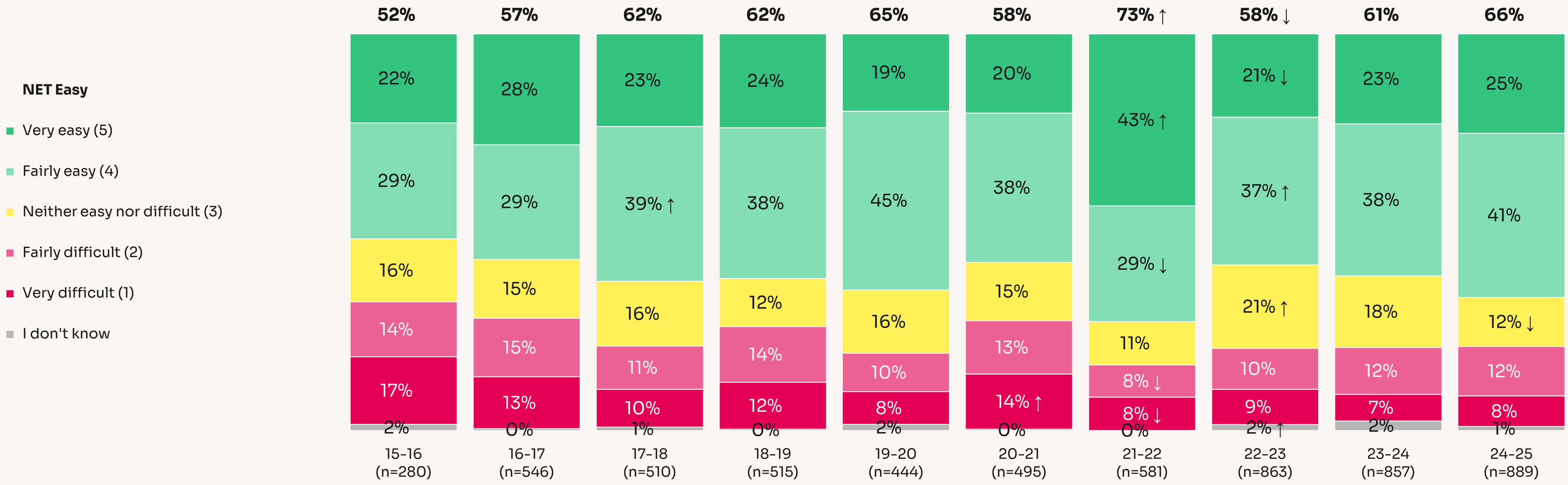
Base: All participants 2024-25 (n=6176).

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

Significance testing to 95%.

When Postal Users have made complaints to the Royal Mail, two thirds found it easy to make a complaint to the Royal Mail

Ease of making a complaint to the Royal Mail (among those making a complaint)



**Note that this question changed from being both Parcels and Letters to just a Letter context. Historic trends not comparable.*

Source: Residential Postal Tracker.

F4. (Old QH5) How easy or difficult did you find it to make a complaint about Royal Mail?

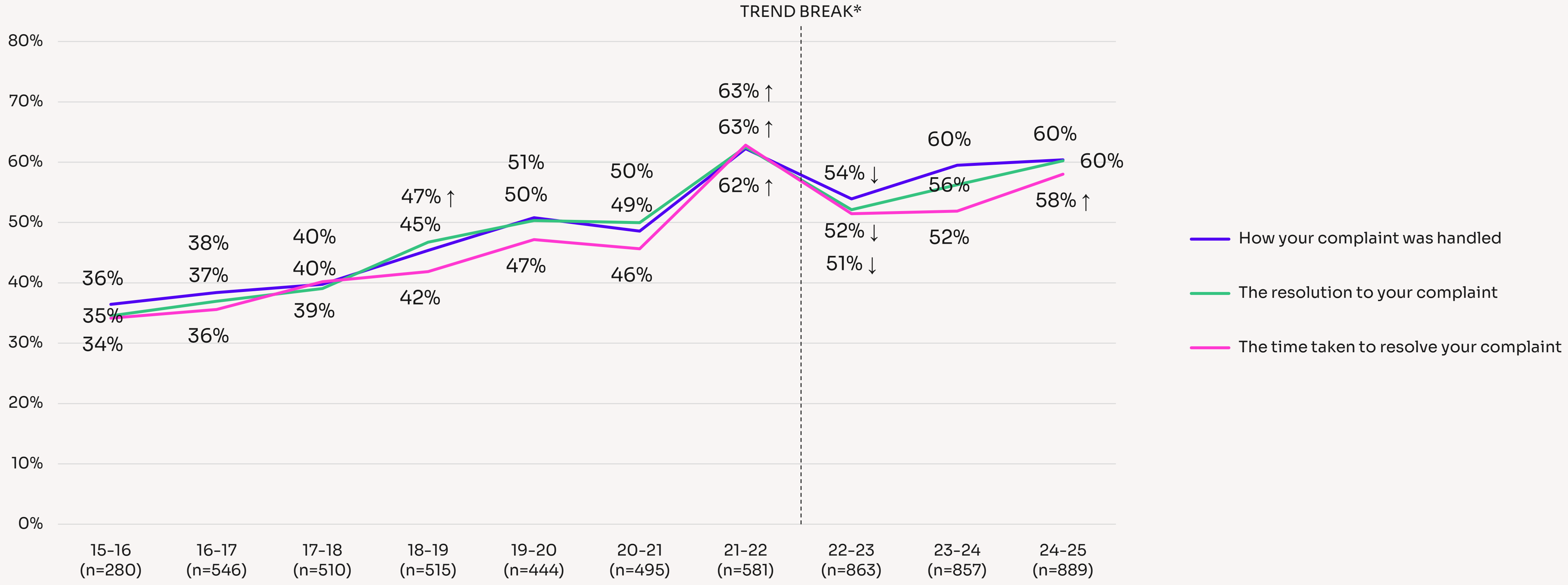
Base: Those who complained to Royal Mail – Sample size shown on chart.

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

Significance testing to 95%.

Satisfaction with the speed with which complaints are being handled has risen over the last year

Satisfaction with the Royal Mail complaints process



**Note that this question changed from being both Parcels and Letters to just a Letter context. Historic trends not comparable.*

Source: Residential Postal Tracker.

F6. (Old QH7) Thinking of Royal Mail's response to your complaint, how satisfied were you with…

Base: Those who found it difficult to complain to Royal Mail – Sample size shown on chart.

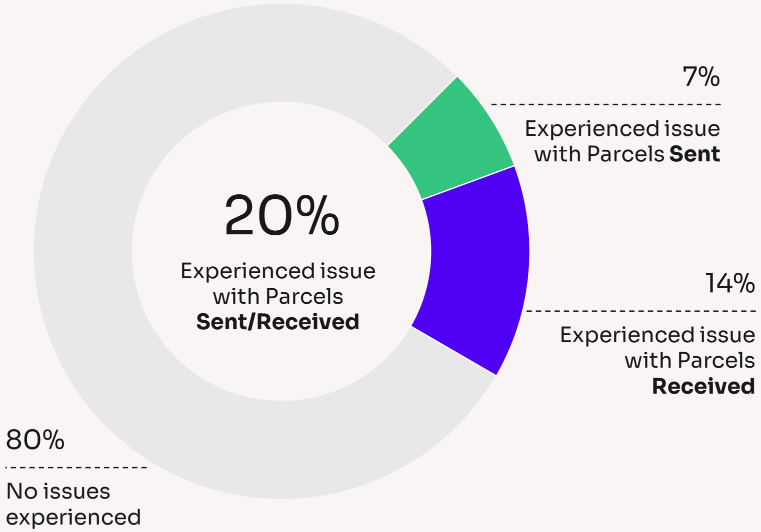
↑↓ Arrows denote significant positive or negative change vs previous time period.

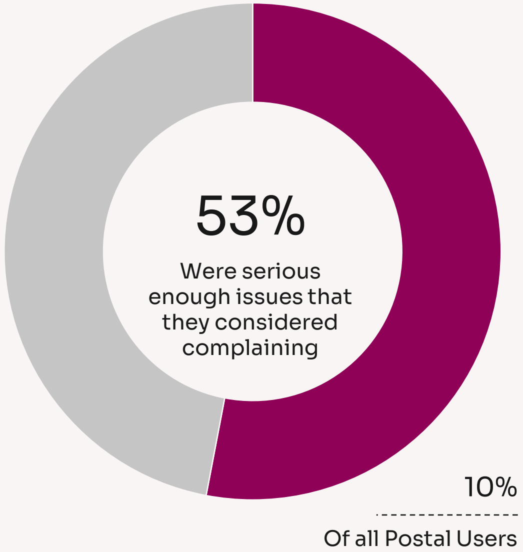
Significance testing to 95%.

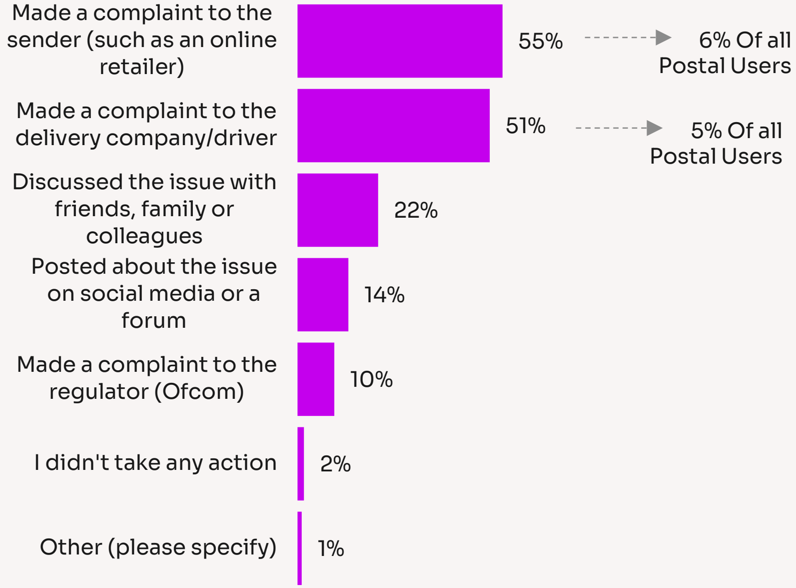
Half of all Parcel related issues experienced were deemed serious enough to consider complaining about, half then go on to complain directly to the delivery company or driver

Parcel Issues and complaints

Incidence | **Severity** | **Action**







Source: Residential Postal Tracker

J10a. Have you experienced an issue with any parcels you've sent or received in the last 6 months? J10b. Have any of the issues you've experienced been serious enough for you to consider taking action, for example seeking advice or complaining? J10c. What action, if any, did you take?

Base: J10a. All participants Jan-Jun 25 (n=3086) J10b. All who experienced an issue at J10a (n=642) J10c. Those who considered complaining (n=341)

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

Significance testing to 95%.