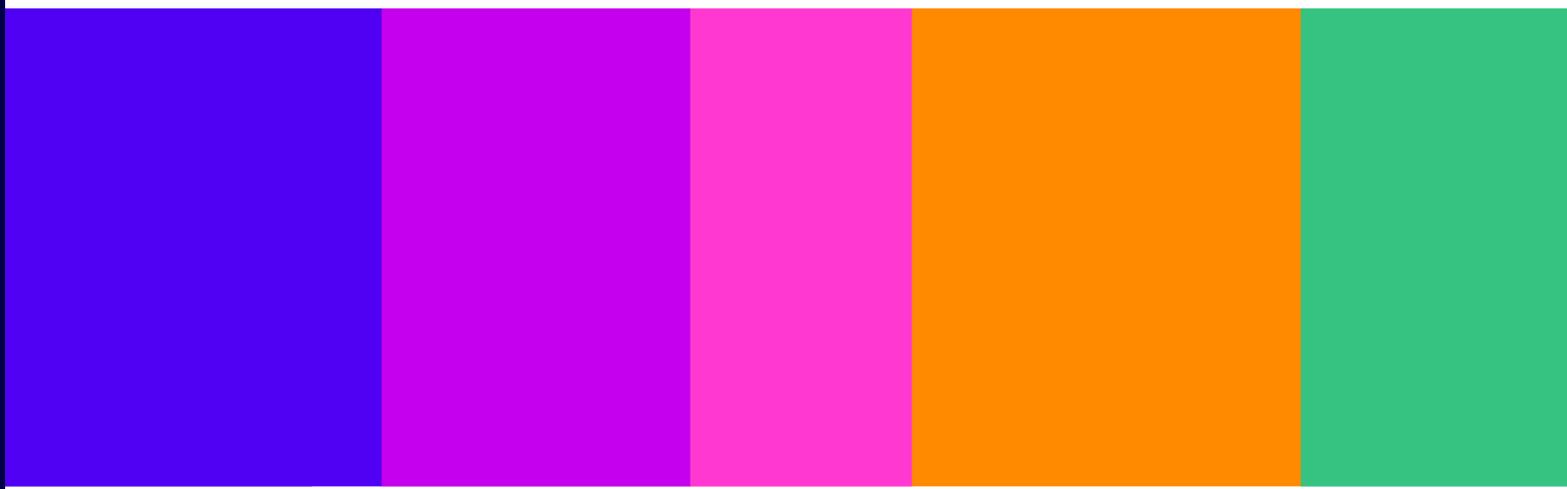


Residential and SME Business postal research trackers

Notification of proposed changes from Q3
2025

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1. Overview

The Residential and SME Business postal research trackers provide Ofcom with data tracking the use and attitudes towards postal services among UK adults and SME's.

Alongside helping to inform internal policy decision making, the tracker also feeds into [Ofcom's Post Monitoring Reports](#). We intend to continue using the trackers for both of these functions.

This document outlines the proposed changes to the Residential and SME Business Postal research tracker. These revisions are designed to align with best practices, ensuring the questionnaire remains as efficient as possible for respondents while maintaining a high-quality sample. By optimising the survey length, we aim to encourage strong response rates and minimise non-completion. In particular, the SME Business questionnaire has been shortened to improve participation, as good response rates among this group are increasingly challenging to achieve.

What we are proposing – in brief

- Removing questions:
 - That do not require continuous tracking
 - That are similar to other questions being asked
 - That have had similar answers over multiple years
 - Amending questions so that we are gathering the most useful data for our needs
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2. Proposed changes to the Post Research Trackers (Residential and SME Business)

Proposed questions for removal

We are proposing removing the below questions from the current questionnaires for the Q3 2025 wave onwards. Please note that the question numbers refer to the 2024/25 questionnaires¹.

SME Business Postal Tracker

Questions that are similar to other questions on the survey:

- **QV2b.1.** On average, how often does your organisation send (different types of post)
- **QV5a.1.** In terms of the number of items you send, which would you say is your organisation's main postal service for ...?
- **QV6c.** Which, if any, of the following Royal Mail services does your organisation use to send your urgent mail or tracked mail that requires proof of delivery?
- **QH.** Does your business ever send Hybrid mail?
- **QRM6.** On a scale of 1 to 5 where 1 is very low and 5 is very high how would you rate Royal Mail on the quality of the services provided in the last 12 months.
- **QOP4.** On a scale of 1 to 5 where 1 is very low and 5 is very high how would you rate [QV4 RESPONSE] on: The quality of the services provided by [QV4 RESPONSE] in the last 12 months.
- **QN1.** Thinking now about sending small parcels, those that are under 2 kilograms in general. Which providers can you think of?

Questions that do not require regular tracking:

- **C5.** Do you have an internet connection in the location where your organisation is based?
- **C8.** Do you have an Account Manager with your postal services provider(s)?
- **QV2b.1.** On average, how often does your organisation send (different types of post)
- **QV2d.2.** Approximately what percentage of the parcels and packets you send are for customer order fulfilment?
- **QV6d1.** Approximately what percentage of your monthly postal spend with Royal Mail is allocated to each of the following types for letters and large letters...
- **QV6d.2.** Approximately what percentage of your monthly postal spend is allocated to each of the following types for parcels?

¹ [Residential Postal tracker January – December 2024 Data tables](#)
[SME Business Postal Tracker January – December 2024 Data tables](#)

- **QV8N.** Do you use any of the following products to send your bulk mailings?
- **QV8N.1.** What types of mail do you use this for?
- **QV9b1 2/3.** Which of the following types of services does each of the types of mail you receive fall into?
- **QOP5b.** And on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied or dissatisfied are you with the overall service you receive from...?
- **QS4.** Have you or your organisation ever considered trying a postal provider other than [QV4 RESPONSES]?
- **QS5.** What are the main reasons for not considering using a postal service provider other than [QV4 RESPONSES] at least for some items?

Proposed questions for amendment

Below is a list of questions we plan to make significant amendments to for 2025 in order to improve the flow of the questionnaire, streamline the questions, and collect new information this year based on developments in the market.

Residential Postal Tracker

- **H2** – Adding answer options ‘Ability to track delivery’ and ‘Option to require the recipients signature’ to gauge importance of these factors when sending letters
- **H9** – Splitting the question into two separate questions. **H9a** covering reasons for choosing 1st class instead of 2nd class and **H9b** covering reasons for choosing 2nd class over 1st class. This will provide a clearer distinction between reasons for choosing 1st class and 2nd class.
- **I3** – Adding answer option ‘At a Post Office using a non-Royal Mail or Parcelforce service’ and amending code 3 to ‘Non-Royal Mail or Parcelforce counter services’ to gauge the use of these services.

SME Business Postal Tracker

- **QV1B** – Combining answer codes so there are fewer groupings as the current level of granularity is not required.
- **QV2a** - Combining answer codes so there are fewer groupings as the current level of granularity is not required.
- **QV4** – Splitting the question into two, one regarding parcels and the other regarding letters/large letters to enhance the granularity of the collected data.
- **QV4** – Removing the split by ‘main provider’ or ‘second provider’ as this level of granularity is not required.
- **QV6bc** – Combining ‘letters’ and ‘large letters’ into one code and removing ‘hybrid mail’ as this level of granularity is not required
- **QV6d** – Changing the question wording to ‘Which of the following Royal Mail services, if any, has your organisation used in the last six months to send your letters and large letters?’
- **QD10b** – Adding answer codes to enhance the granularity of the collected data.
- **QV6a.1** - Changing the question wording to ‘Which, if any, of the following Royal Mail parcel delivery services has your organisation used in the last six months to send parcels?’

- **QV7a** - Splitting the question into two, one regarding parcels and the other regarding letters/large letters to enhance the granularity of the collected data.
- **QRM1** – Changing the answer option from an open ended time input to providing time bands, making it clearer for respondents to select from and for interpreting the collected data.
- **QOP3A and QOP3** – Changing to ask separately about Receiving letters, sending letters, receiving parcels and sending parcels to enhance the granularity of the collected data.
- **QS1a and QS1b** – Asking separately about letters and parcels and combining the format of both questions for respondents to respond ‘Increase’, ‘Decrease’ or ‘Stay the same’ to help streamline the questions.

Tell us what you think

If you have any comments on these proposed changes, or if you want more information, please email marketresearch@ofcom.org.uk by 9am on 27 June 2025.

3. Background

Residential Postal Tracker

Ofcom's Residential Postal Tracker is a continuous tracking study conducted via CAPI (1,000) and Online (c.5,160) (panel sourced) interviews with post decision makers – 6,160 interviews conducted all year round (to account for seasonal differences). The study measures opinion, usage and attitudes to postal services among UK adults. The Residential Postal Tracker begun in 2012 where interviewing was conducted using a purely face-to-face methodology. Between January 2016 and December 2019, data was collected using a combined methodological approach: face-to-face interviews conducted using random probability sampling and online interviews using quota sampling. The data from both methodologies were then combined and weighted to nationally representative proportions in terms of age, gender, ethnicity, country and socio-economic group (SEG), and then a further 'evaluative' weight was introduced to account for a 'positivity bias'.

Between March 2020 and December 2022, due to the Covid-19 pandemic, Ofcom made the decision to halt all face-to-face fieldwork. Datasets that cover this period have therefore focused on predominantly online only data. As of January 2023, the face-to-face element of the fieldwork was reintroduced. This dataset therefore contains data from both face-to-face and online methodologies.

SME Business Postal Tracker

The Business Postal Tracker aims to achieve 2,200 individual interviews per year with those responsible for their organisations post. The sample achieved is representative of the profile of small and medium sized businesses (SMEs) with 0-249 employees across the UK, across a fieldwork period of 12 months. The research aims to measure the use of and attitudes towards postal services amongst SMEs in the UK.

The research covers the following topic areas: volume and use of postal services, reported experience with Royal Mail and other providers, overall satisfaction and change in mail as a communication method.

The Business Postal Tracker is carried out using a mixed Computer Aided Telephone Interviewing (CATI) and online (CAWI) methodology, with samples split 25:75 CATI:online.