Ofcom Residential Postal Tracker Technical Report Q1 2025 – Q4 2025

A. Preface

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

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

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

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

A.1. July 2022 Survey Changes

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

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

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

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

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

A.2. Subsequent questionnaire changes since Q3 2023

As the survey continues we make small quality of life improvements to the questionnaire to ensure that it remains fit for purpose. These changes are summarised below:

- **March 2024**: UK Mail was removed from section J to avoid confusion between UK Mail and Royal Mail
- **March 2024**: Minor amends to the options available at J2
- **April 2024**: 1st, 2nd and European stamp prices at H5, H6 and H7 were updated to reflect the increase in the stamp price
- **October 2024** – European stamp price at H5 was updated to reflect an increase in the stamp price
- **January 2025 –** Social Media was removed from C2 – with a new code added for "Mobile App (e.g. banking app notifications or social media)"
- **January 2025 -** European stamp price at H5 was updated to reflect an increase in the stamp price
- **January 2025 –** Competitor list within section J was amended to be consistent with other Ofcom Postal Tracking research
- **January 2025 –** Section J was reviewed and amended to cut down questionnaire length where base sizes were consistently not sufficient to allow for competitor analysis and may be better captured in other Ofcom Postal Tracking research
- **July 2025** – H9 was split into separate questions (H9a and H9b) to better distinguish between reasons for 1st class and 2nd class stamp usage
- **July 2025** – Minor amendments were made to survey instructions and options the most significant changes are listed here:
    - E1 added an example to code 3 (Letters from organisations that you have a relationship with e.g. updates to terms and conditions from your bank)
    - H2 x2 additional codes were added ('Ability to track delivery' and 'Option to require the recipients signature')
    - I3 an additional code was added (At a Post Office using a non-Royal Mail or Parcelforce service)
    - J1 – references to the word "packet" were removed

A.3. Q1 2025 – Q4 2025 Data Table Summary

The data tables published includes 6,171 users of the postal service who participated in the Residential Postal Tracker survey between January 2025 – December 2025. Results were then weighted to correct for over-representation of devolved nations and urbanity within nation. We also applied weights for age, gender, working status and government region to ensure we created a representative UK sample.

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

B. Sample Design

B.1. Online Interviewing

Jigsaw Research adopted a quota sample approach to online interviewing to ensure that the sample was representative of UK Postal Users (those who claim to send or receive no letters or parcels in the past year are excluded). Due to the continuous nature of the research, monthly targets are imposed to ensure a representative spread of interviews throughout the quarter. The sample frame was developed at a UK level covering the following key subgroups:

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

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

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

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

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

To ensure a robust allocation to quotas, participants are allocated in the first instance by providing their post code data. This is used to allocate to their Government Region and urbanity (according to UK Geographics). Participants are additionally asked to self-select their Region and Urbanity to allow for comparison and provide an option for use when their Postcode is not found or the participant does not wish to be identified.

In the case of Highlands and Islands of Scotland, we first use their Postcode allocation to identify them as a participant based in Scotland and then use their self-selection answer to the region question to allocate them as a Highlands & Islands participant.

B.2. Face to Face Interviewing[1]

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

As per the online sample, those who claim to send or receive no letters or parcels in the past year are excluded from the research.

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

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

B.3. Quota achievement

For the year January 2025 to December 2025 all quotas were met. A summary of the yearly achievement vs original quotas are available in the table below.

	Yearly target	Year Achieved
Male	2856	2985
Female	2952	3179
16 – 24 year olds	784	770
25-44 year olds	1884	1948
45-64 year olds	1840	1989
65-74 year olds	716	847
75+	588	616
AB	1264	1503
C1	1796	1811
C2	1228	1234
DE	1520	1623
North East	340	337
North West	340	369
Yorks/Humberside	340	358
East Mids	340	343
West Mids	340	365
East Anglia/East of England	340	365
London	340	381
South East	340	374
South West	340	350
Scotland	1080	1160
Wales	924	958
Northern Ireland	760	811

C. Data Quality

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

Questions of particular focus included:

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

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

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

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

D. Weighting

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

D.1. Demographic weights

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

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

Category	England		Scotland		Wales		NI	
	Unweighted	Weighted	Unweighted	Weighted	Unweighted	Weighted	Unweighted	Weighted
Male	49%	49%	48%	48%	48%	49%	48%	49%
Female	51%	51%	52%	52%	52%	51%	52%	51%
Gender not listed or specified	<1%	<1%	<1%	<1%	<1%	<1%	0%	0%
16-24	13%	13%	13%	13%	12%	14%	12%	14%
25-44	31%	32%	31%	31%	32%	29%	33%	33%
45-64	32%	32%	32%	33%	32%	32%	34%	33%
65-74	13%	12%	15%	13%	14%	14%	13%	11%
75+	10%	10%	10%	10%	11%	11%	8%	9%
Urban	91%	87%	44%	83%	42%	76%	50%	70%
Rural	9%	13%	56%	17%	58%	24%	50%	30%
Working	54%	60%	55%	59%	54%	60%	65%	59%
Not working	44%	39%	43%	39%	44%	39%	33%	39%

Category	UK	
	Unweighted	Weighted
North East	5%	4%
North West	6%	11%
Yorkshire/Humberside	6%	8%
East Midlands	6%	7%
West Midlands	6%	9%
East Anglia/ East of England	6%	9%
London / Greater London	6%	13%
South East	6%	14%
South West	6%	9%
Scotland	19%	8%
Wales	16%	5%
Northern Ireland	13%	3%

E. Statistical reliability and significance

E.1. Effective sample size

This section details the variation between the sample results and the "true" values, or the findings that would have been obtained with a census approach. The confidence with which we can make this prediction is usually chosen to be 95%: that is, the chances are 95 in 100 that the "true" values will fall within a specified range. However, as the sample is weighted, we need to use the effective sample size (ESS) rather than actual sample size to judge the accuracy of results.

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

Category	Sub-group	Actual interviews achieved	Effective sample size (ESS)
Nation	England	3242	2865
	Scotland	1160	587
	Wales	958	514
	Northern Ireland	811	598
Gender	Male	2985	1827
	Female	3179	1953
Age	16-24	770	487
	25-34	887	530
	35-44	1061	649
	45-54	787	475
	55-64	1202	771
	65-74	847	509
	75+	616	369
SEG	AB	1503	747
	C1	1811	1135
	C2	1234	820
	DE	1623	1082

E.2. Confidence interval

The table below illustrates the required ranges for different sample sizes and percentage results at the "95% confidence interval":

Effective sample size	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
3,783 (Total)	0.96%	1.27%	1.46%	1.56%	1.59%
2,865(England)	1.10%	1.46%	1.68%	1.79%	1.83%
1,827 (Male)	1.38%	1.83%	2.10%	2.25%	2.29%
587 (Scotland)	2.43%	3.24%	3.71%	3.96%	4.04%

For example, if 30% or 70% of a sample of 3,783 gives a particular answer, the chances are 95 in 100 that the "true" value will fall within the range of +/- 1.46 percentage points from the sample results.

E.3. Significant differences

When results are compared between separate groups within a sample, different results may be obtained. The difference may be "real", or it may occur by chance (because not everyone has been interviewed). To test if the difference is a real one – i.e. if it is "statistically significant" – we again have to know the size of the samples, the percentages giving a certain answer and the degree of confidence chosen.

If we assume "95% confidence interval", the difference between two sample results must be greater than the values given in the table below to be significant:

Effective Sample sizes being compared	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
1,827 vs 1,953 Male vs Female	2.00%	2.62%	2.97%	3.15%	3.19%
487 vs 369 16-24 vs 75+	4.38%	5.65%	6.35%	6.70%	6.76%

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