



# Product advice and quality of service in Crown and franchised post offices



Prepared by

**Bryan Atkin and Jennifer Ross**

## Table of Contents

Executive Summary .....	3
Objectives and Methodology .....	3
Summary of Findings.....	3
Crown and Franchises (Excluding WHSmith post offices) .....	3
Overall .....	3
Queue lengths and waiting times .....	4
Quality of advice .....	5
Crown Offices vs. Franchised Offices .....	5
Regional comparison .....	6
WHSmith Franchises.....	6
1. Introduction.....	8
1.1 Background .....	8
1.2 Objectives.....	8
2. Survey Design .....	10
2.1 Methodology.....	10
2.2 Sampling .....	11
2.2.1 Sample composition and comparison with previous surveys.....	11
2.2.2 Weighting of the sample .....	11
3. Main Findings .....	13
3.1 Queue length.....	13
3.1.1 Number of customers in the queue .....	13
3.1.2 Impact of the queue .....	15
3.1.3 Use of Post Office Ltd initiatives .....	15
3.1.4 Summary .....	16
3.2 Queue duration.....	16
3.3 Counter positions.....	18
3.4 Customer Advisors .....	23
3.4.1 Time spent with customer advisor.....	23
3.4.2 The manner of the customer advisor .....	24
3.4.3 Quality of advice .....	27

Scenario 1: Pricing in proportion and proof of purchase .....	27
Scenario 2: Special delivery .....	29
3.5 The Interior of the Post Offices .....	32
3.5.1 Post office interiors .....	32
3.5.2 Availability of customer service leaflet.....	33
3.6 The Exterior of the Post Offices .....	34
3.6.1 Signage and information .....	34
3.6.2 Exterior appearance .....	35
3.7 Parking .....	37
3.8 Facilities for the Disabled.....	38
3.9 Conclusions and Focus for Improvement.....	40
4. WHSmith Outlets .....	41
4.1 Background .....	41
4.2 Main findings .....	41
4.2.1 Queue lengths and waiting times .....	41
4.2.2 Customer advisor.....	42
4.2.3 Scenario 1: Pricing in proportion and proof of postage.....	43
4.2.4 Scenario 2: Special delivery.....	44
4.2.5 Interior .....	44
4.2.6 Exterior .....	44
4.2.7 Facilities for wheelchair users.....	45
4.2.8 Conclusions .....	45
Appendix A Questionnaire .....	46



## Executive Summary

### Objectives and Methodology

The overall objective was to assess the quality of service and advice provided by Crown and franchised post offices, and determine how, if at all, the customer experience differed across Postwatch regions, and between the two types of outlet.

The research also provided the opportunity to update performance measures for WHSmith post offices, the number of which has increased significantly over the past year, and is set to increase further.

A mystery shopping exercise was carried out to measure the following factors across all branch types:

- Queue length and duration
- Quality of advice provided by customer advisors, and their product knowledge using two pre-determined scenarios
  - ◆ Pricing in Proportion (PiP) and Proof of Postage
  - ◆ Special Delivery
- Branch performance on various customer experience measures, including:
  - ◆ Accessibility
  - ◆ Appearance
  - ◆ Availability of information leaflets

To allow comparability with previous years' surveys, as little amendment as possible was made to the list of factors measured in 2007.

### Summary of Findings

It is important to interpret this year's results in the context of the Network Change Programme which has seen important amendments to the makeup of the Post Office Network since the 2007 survey.

Of particular note is the increased number of WHSmith franchised post offices which now exist and which is reflected in the number of WHSmith franchises assessed – 50 compared with 6 in 2007. However, as many of the WHSmith post offices are relatively newly established, it did not make sense to compare them directly with the far longer established Crown and franchised branches. The findings from these branches have, therefore, been dealt with separately.

### Crown and Franchises (Excluding WHSmith post offices)

#### Overall

Overall, the post office experience continues to be positive:

- The demeanour and attitude of customer advisors were rated highly by our mystery shoppers – 94% of mystery shoppers considered the advisors they dealt with to be polite and helpful and express themselves clearly
- Time spent with customer advisors has slightly increased, from an average of 3 minutes 20 seconds in 2007 to 3 minutes 35 seconds in 2008

- Both the exterior and interior appearance of post offices were well received with more than four in five branches considered to have clean and well maintained exteriors, and a similar proportion rated as having clean, tidy and well lit interiors
- Facilities for the disabled varied but the great majority provide suitable access for wheelchair users
  - ◆ Three quarters of post offices had a flat (level) street entrance, more than four fifths had a wide entrance, and a similar proportion had wide aisles and adequate floor space inside

However, some room for improvement still exists:

- Far from all customer advisors followed simple rules of customer service such as greeting, smiling or being friendly in the way they handled the customer's business, especially in franchised offices where fewer than three quarters of customer advisors were reported as greeting the customer, and fewer than three in five were reported as smiling
- Not all offices (esp. Franchises) clearly display opening times and a list of the types of service they provide
- Over half of all post offices visited reportedly had trip hazards!
- Facilities for the disabled tend to be basic (e.g. flat and wide entrances are common but there is a lack of special wheelchair doors or low-level counters – only 52% of branches had these, and only 21% were staffed)
- Availability of leaflets continues to be poor despite a dedicated display space being provided – less than two in five branches had leaflets available

### Queue lengths and waiting times

Despite the programme of closures, queue lengths and waiting times have stabilised this year:

- Queue length has decreased in both Crown and franchise offices from 2007 and 2006 levels, down from an overall average of 8.5 customers in front of the mystery shopper in 2007 to 7.3 in 2008
- Waiting times have also slightly decreased, down from an overall average of 4 minutes 50 seconds in 2007 to 4 minutes 20 seconds in 2008, although they have not quite reached 2006 levels
- It is not, however, entirely clear to what this improvement is attributable:
  - ◆ A positive effect of initiatives aimed at managing queue length and waiting times
 Or
  - ◆ Reduced traffic, due to customers not migrating to other post office branches when their local branch has closed
 Or
  - ◆ The Crown office network franchising to WHSmith some of its worst performing branches in terms of queue times

Nevertheless, there is still room for improvement, especially in Crown offices:

- Almost a third of Crown offices had queues of 10 or more customers
- In over a third of Crown offices waiting time exceeded 5 minutes

- The proportion of service counters open and accepting customers has deteriorated since 2006 and 2007 – down to 52% from 60% in 2007 and 56% in 2006
- Only a very small minority used a queue host (11 branches overall)
- No indication that measures such as opening additional counters or queue hosts are used to manage high volumes of business, in spite of the availability of footfall data

### Quality of advice

Quality of advice continues to be rated highly, but room for improvement still exists

- The vast majority of customer advisors offered the correct products in our test scenarios : 99% sold the correct stamp, and 92% correctly recommended special delivery
- The number of customer advisors probing for additional information has significantly increased compared with previous years

However, a third of Crown office customer advisors are still providing the wrong advice

- Several customer advisors offered an incorrect value stamp and more did not recommend special delivery when appropriate
- A third did not provide the correct proof of posting
- Many did not request additional information which would have enabled them to make better recommendations

### Crown Offices vs. Franchised Offices

Franchised offices are establishing themselves as suitable alternatives to Crown offices:

- Franchised offices continue to outperform Crown offices in terms of queue length and waiting times
  - ◆ Average queue length of 2.9 customers compared with 7.3
  - ◆ Average queue time of 3 minutes 10 seconds compared with 5 minutes 40 seconds
- The quality of advice in franchised offices was similar to Crown offices
- Overall, the experience in franchised offices was rated positively

However, franchises lag behind Crown offices in some aspects of the post office experience:

- Customers advisors in Crown offices were more friendly and more likely to probe for information
  - ◆ 92% of Crown mystery shoppers rated their customer advisor as friendly compared with only 77% shoppers in franchises
- Crown offices were more likely clearly to display opening times and types of services provided (90% of Crowns compared with 72% of franchises had opening times on display)
- Facilities for the disabled were more commonly available at Crown offices

## Regional comparison

Greater London performs more poorly than other regions and queuing has actually deteriorated which is against the general trend. The best performance is in Wales.

### Queues:

- Mystery shoppers in Greater London and the North were more likely to experience longer queues and had above average waiting times
  - ◆ Contrary to most other regions, average queue time in London increased by 20 seconds compared to 2007
- Wales and Scotland had the shortest queues and in Wales, Scotland, N.Ireland and the South & West, the vast majority of mystery shoppers were seen within 5 minutes.
  - ◆ In Wales, average queue time was almost halved compared to 2007

### Post Office Experience:

- Manner of customer advisor: The North was the only region with scores consistently above average. Greater London branches are rated consistently below average and have the lowest scores overall
- The post office exterior was more highly rated in Wales, Northern Ireland, Scotland and the Midlands
- The post office interior was rated particularly positively in Wales and the East whilst Greater London and the South West performed more poorly

## WHSmith Franchises

Overall, WHSmith franchises have got off to a good start:

- Despite having been converted from high-traffic Crown offices, queue lengths and waiting times were acceptable
  - ◆ Queues averaged 7 customers and waiting times averaged approximately 6 minutes
- The quality of advice was high
  - ◆ 100% of customer advisors sold the correctly priced stamp in our purchase scenario
- The overall experience – including the attitude of the customer advisor, exterior and interior experience and facilities for the disabled – was rated positively
  - ◆ Availability of wheelchair access was very high and other facilities for disabled customers were also widely available
- Provision of information on opening times and available services was at least as good as Crown offices and better than franchised offices
  - ◆ 92% had opening times on display and only 12% failed to display any information about available services

Future training and advice should focus on:

- Encouraging customer advisors to probe for additional information
  - ◆ Only 65% of advisors were doing this currently
- Ensuring training of advisors includes specific guidelines with regards to proof of posting and special delivery

- ◆ Only 68% offered a stamped certificate of posting when proof of posting was requested
- ◆ Special delivery was not recommended, when appropriate, in 14% of visits
- Encouraging further investment in facilities for the disabled

## 1. Introduction

### 1.1 Background

Postwatch is an independent consumer watchdog for postal services, set up to ensure that Royal Mail, and other licensed postal providers in the UK, offer the best possible service to their customers.

The post office network is currently undergoing a period of change. Measures have been put in place to modernise and reshape the network and put it on a more stable footing. As part of this, the Government decided in 2007 that it was necessary to close up to 2500 post offices across the UK, some of which would be mitigated by the establishment of 500 new 'outreach' type service points. Post Office Ltd put in place a Network Change Programme to implement the Government's decision. This commenced in July 2007 and the first closures took place in January 2008. It should be noted that fieldwork for this research was carried out in the context of a reducing network.

In an effort to bring its Crown office network back into profit and prevent further closures, many Crown offices have been converted into franchised offices. Remaining Crown offices have been undergoing a process of modernisation to serve as flagships for the Post Office brand.

Following successful trials at six branches in 2006, 50 Crown offices have been relocated to WHSmith stores, with 70 of such franchises anticipated in total. On average, the chosen WHSmith branches are close to the original site of the post office (within 250 metres).

It should be noted that the Crown offices which were closed and replaced with WHSmith franchises tended to be among the poorest performing branches. It could reasonably be expected, therefore, that the new franchises will likely have inherited some or all of the previous Crown's problems. On the other hand, some of the WHSmith franchises are newly established and it would not be fair, therefore, to expect performance levels to be on a par with longer established branches. For these reasons, we have continued to segregate WHSmith outlets from the main analysis<sup>1</sup>, and refrained from treating Crown or franchise scores as a benchmark for the performance of these newer branches.

This research builds on similar research undertaken in 2004, 2006 and 2007 and will enable Postwatch to:

- Continue monitoring the customer experience at Crown and franchise post offices, including those now located in WHSmith stores
- Evaluate whether additional training in Crown post offices is helping to reduce queue times and improve quality of advice
- Inform Postwatch policy on proposed further conversions of Crown post offices into franchised operations, including those operated by WHSmith

### 1.2 Objectives

While the overall objective of the project was to assess the quality of service and advice provided by Crown and franchised post offices, more specific objectives included updating information on:

- Queue length and duration, and how these differ in Crown and franchised offices

---

<sup>1</sup> WHSmith visits are not included in the analysis, tables and graphics that make up the main body of the report, but are reported separately later on.

- Quality of advice and product knowledge
  - ◆ Focusing in particular on PiP and Special Delivery (2 pre-determined scenarios)
- Performance of branches on customer experience measures, including:
  - ◆ Accessibility
  - ◆ Appearance
  - ◆ Availability of information
- To determine how WHSmith franchised post offices compare with other franchised offices and Crown offices
- To assess any performance differences across Postwatch regions
- Compare with and update learnings from previous waves of research

## 2. Survey Design

### 2.1 Methodology

Similar to previous studies Postwatch has commissioned into quality of service at post offices (2007, 2006 and 2004), a mystery shopping exercise was conducted, which involved carefully briefed mystery shoppers evaluating the customer experience on a number of set factors by posing as bona fide post office visitors. To ensure consistent observations across branches all shoppers used the same evaluation forms and presented customer advisors with the same scenarios and information during interactions. Evaluation forms were filled out immediately on completing the visit; the form used can be found in Appendix A.

The evaluation form used by the mystery shoppers was essentially the same, in terms of content, as that used in 2007 including specific, pre-determined scenarios on Pricing in Proportion (PiP) and Special Delivery. However, the order of some sections was changed to improve logical flow and a Proof of Purchasing question was added into scenario 1 (Pricing in Proportion).

Fieldwork was conducted between 6<sup>th</sup> June and 30<sup>th</sup> June 2008. Mystery shoppers visited a total of 424 post office branches, including franchised offices, Crown offices and WHSmith franchises. The number of WHSmith franchises visited was significantly increased compared with 2007 to reflect their expanding role in the provision of postal services since 2007 (see table 2.3 for details of how visits were distributed). Visits were once again distributed across every day of the week (Monday to Saturday); however quotas by time were set across 6 rather than 5 time slots with the addition of a new 16:30-17:30 slot and adjustment of the duration of the morning slots.

Tables 2.1 and 2.2 show the day and time distribution for the 2008 visits:

**Table 2.1 Day of week of visit**

	% of visits	Number of visits
TOTAL	100%	424
Monday	16%	68
Tuesday	13%	56
Wednesday	13%	53
Thursday	18%	78
Friday	21%	90
Saturday	19%	79

**Table 2.2 Time of day of visit**

	% of visits	Number of visits
TOTAL	100%	424
9:00-10:30	27%	116
10:30-12:00	21%	90
12:00-13:00	16%	67
13:00-14:00	10%	44
14:00-16:30	20%	84
16:30-17:30	6%	23
After 14:00	26%	107

## 2.2 Sampling

### 2.2.1 Sample composition and comparison with previous surveys

For 2008, an increased sample size was used compared with earlier years, with a more even distribution across regions, enabling more robust regional comparisons to be made.

As in 2007, post office branches in both rural and deprived areas were represented. Excluding WHSmith franchises, mystery shoppers visited 21 rural branches compared with 353 urban branches and 168 deprived area branches compared with 206 non-deprived branches.

In order to provide the continuity required for a true report of progress, it was decided to re-visit, as far as possible, branches visited in 2007. The sample list was augmented by adding new WHSmith franchises; replacing closed/ converted branches with new sample matched by type (Crown, franchise), region, rurality and deprivation; and randomly selected fresh sample.

Excluding the WHSmith franchises, 288 branches were visited from the 2007 survey sample (of which 143 were also visited in 2006).

Table 2.3 shows the sample distribution across regions and by post office type. In line with the changes occurring in the post office network, the proportion of Crown offices represented in the sample has decreased from 45% in 2007 to 41% in 2008.<sup>1</sup>

**Table 2.3 Unweighted number, location and type of post office visited**

	Crown	Franchise	Total excluding WHSmith	WHSmith
TOTAL	154	220	374	50
Greater London	29	29	58	14
South East	18	19	37	15
South & West	14	23	37	3
East	15	21	36	3
Midlands	15	22	37	5
North	23	36	59	5
Scotland	15	22	37	4
Wales	17	19	36	1
Northern Ireland	8	29	37	0

### 2.2.2 Weighting of the sample

To produce a profile of visits comparable to 2007 and 2006 we excluded the WHSmith visits from the main analysis, as these were not included in the main analysis in 2007, and weighted each regional cell in the remaining sample to match the average of the 2006 and 2007 sample profiles. For example, this means that in the weighted sample, visits in Greater London become proportionally more, and Northern Ireland visits proportionally fewer compared to the unweighted sample. This means that the individual results for otherwise smaller regions (e.g. Wales and Northern Ireland) are more robust than in previous years, since they are based on a larger number

<sup>1</sup> This distribution does not necessarily represent the proportion of Crown and franchised offices in the Post Office Network.

of actual visits.

**Table 2.4 Weighted number, location and type of post office visited**

	Total 2006	Total 2007	Total (weighted) 2008	Total (unweighted) 2008
TOTAL	360	363	374	374
Greater London	70	79	80	58
South East	38	34	37	37
South & West	33	28	34	37
East	24	28	26	36
Midlands	42	41	41	37
North	74	77	79	59
Scotland	37	35	37	37
Wales	22	22	22	36
Northern Ireland	20	19	18	37

Throughout the main section of the report, weighted results have been used with the exception of:

- Those cases where we are considering a single region or comparing two or more regions side by side
- Additional analysis into the proportion of counters open by crown offices and franchises (tables 3.14 and 3.15)
- All WHSmith results

### 3. Main Findings

#### 3.1 Queue length

##### 3.1.1 Number of customers in the queue

The average number of customers (counting groups or couples as one) in the queue in front of the mystery shopper was just under 5, a reduction in queue size of 1 person since 2007.

**Table 3.1 Average queue length 2006-2008**

	Crown	Franchise	Total
<b>2008</b>	<b>7.3</b>	<b>2.9</b>	<b>4.9</b>
2007	8.5	3.8	5.9
2006	8.3	3.8	5.9

2008 weighted base: Crown (169) and Franchise (205)

As in 2006 and 2007, queues were still twice as long in Crown branches as in franchises, with average queue lengths of 7 compared with 3. Four fifths of queues (83%) reported for franchised offices had a maximum of 5 people, compared with only half (51%) of Crown office queues. In fact, almost a third of Crown offices had queues of 10 or more customers, and a sixth of Crown queues had 16 people or more customers in front of the mystery shopper (little change since 2007). The longest Crown office queue comprised 32 customers, compared with a maximum queue length of 18 in a franchised branch.

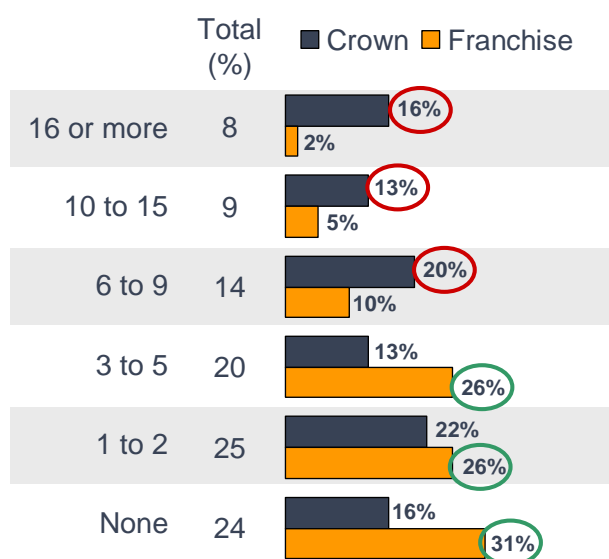
**Table 3.2 Proportion of queues with more than 5 people**

	Crown	Franchise	Total
<b>2008</b>	<b>49%</b>	<b>17%</b>	<b>31%</b>
2007	56%	26%	40%
2006	56%	24%	38%

2008 weighted base: Crown (169) and Franchise (205)

However, since 2007 there has been an 8% increase in the proportion of mystery shoppers experiencing no queue at all.

**Table 3.3 Number of customers in the queue by branch type**



Weighted Base: Crown (169) and Franchise (205)

Mondays were the worst days for queuing, with on average, 7.5 customers in the queue ahead. Saturdays and Tuesdays were the next busiest, with queues of 5.3 and 5.2 respectively.

The worst time for queuing was 14.00-16.30 when queues averaged more than 6 people (6.1) - twice as long as the queues at 9.00-10.30 (3.3).

At an overall level, there has been little consistency in these queue patterns over the past 3 years, by time of day:

- In 2007 the period after 14.00 was that with the shortest queues, with 10.00 -11.00 being the busiest
- In 2006 10.00 -11.00 was the time when queues were longest

Customers in Greater London and the North of England were the most likely to experience longer queues. The average queue length in both these regions was 6 people, and 42% of queues in both regions comprised more than 5 people.

Wales and Scotland had the shortest queues, with, on average, only 2 people in front of the mystery shopper. Just 11% of queues in Wales and 13% of queues in Scotland had more than 5 people, and in Wales almost half had no queue at all.

Since 2007 queuing times have slightly decreased across all regions, except North England and Northern Ireland. However, customers in Greater London still experience the longest waits.

**Table 3.4 Number of customers in the queue by region**

	Base size	Number of customers in queue
OVERALL MEAN	374	4.9
Greater London	80	<b>6.2</b>
South East	37	5.1
South & West	34	4.2
East	26	5.2
Midlands	41	4.6
North	79	<b>6.1</b>
Scotland	37	<b>2.2</b>
Wales	22	<b>2.1</b>
Northern Ireland	18 <sup>1</sup>	4.3

Not surprisingly, customers in rural regions were less likely to experience long queues, with only 12% in queues of more than 5 people compared with 33% in urban post offices.

### 3.1.2 Impact of the queue

As in 2007 and 2006, for a very small proportion of visits (3%), the queue for service extended outside the post office building, or in the case of franchises, outside the allocated post office area. Of the 13 branches concerned, the majority were once again Crown offices (8:5) and all were urban branches. However, this was limited to only a handful of cases on Mondays, Saturdays and one Friday.

More concerning was a big increase in the proportion of mystery shoppers (now 23%) who described queues as blocking access to other post office products and services. This figure has more than doubled since 2007 (9%) and tripled since 2006 (7%).

*“All cards and postal merchandise was displayed right where the queue was waiting - you would have to get in the queue to see any products.”*  
[Crown, North]

### 3.1.3 Use of Post Office Ltd initiatives

Despite the length of queues experienced, only 11 branches (10 Crown offices, 1 franchise) employed a queue host.

- These branches had queues of between 9 and 32 customers (22 on average), and waiting times in the range of 3 to 17 minutes (an average of 12 minutes)

However, the sentiment expressed by some was that it might have been more beneficial to have the queue host behind the counter instead.

*“A customer advisor was circulating, but with little effect. I feel her time would have been better spent opening another service window.”*  
[Crown, Midlands]

<sup>1</sup> Low base size

### 3.1.4 Summary

Overall, there has been a small improvement from 2007 and 2006 in the average queue length and size of queue, although franchised offices are still outperforming Crown offices and customers in Greater London are still the worst hit by long queues.

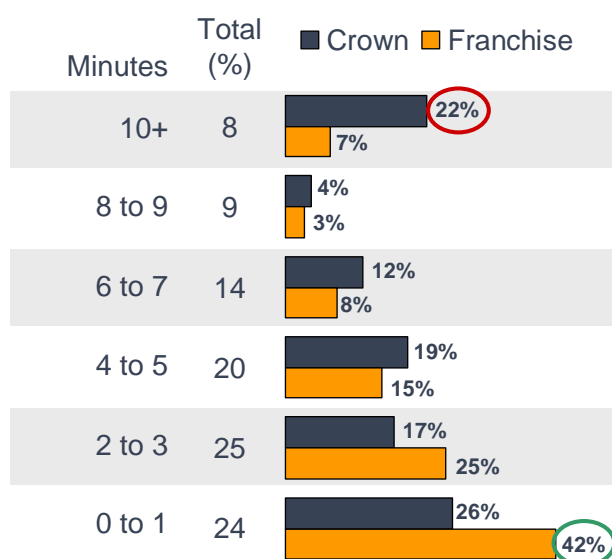
However, given that this research was conducted within the context of the Network Change Programme, it is difficult to assess whether queues are shorter because Post Office Ltd has successfully taken steps to manage them better, or whether shorter queues are a symptom of decreased usage i.e. are customers simply not migrating to other post offices once their local branch has closed?

### 3.2 Queue duration

As in previous years, mystery shoppers recorded how long they had to wait in the queue before being served by a customer advisor.

The overall average waiting time in 2008 was 4 minutes and 20 seconds. However, average waiting times were significantly longer at Crown offices (5 minutes 38 seconds) than at franchised offices (3 minutes 12 seconds).

**Table 3.5 Time spent waiting in queue**



Weighted Base: Crown (169) and Franchise (205)

Mystery shoppers at franchised branches were almost twice as likely to experience shorter queues than those visiting Crown branches: two fifths of mystery shoppers visiting franchises were served within a minute, with four fifths being seen within 5 minutes. Comparatively, more than two thirds of mystery shoppers visiting Crown branches had to wait longer than 5 minutes, with only a quarter seen within 1 minute. Almost a quarter had to wait for 10 minutes or more – the longest wait being 30 minutes.

Above average queue times were experienced:

- On Mondays (5 minutes 41 seconds), when two fifths of mystery shoppers queued for longer than 5 minutes, and Saturdays (average queue time of 4 minutes 51 seconds) when almost a third of mystery shoppers waited for longer than 5 minutes to be served
- Between 16.30-17.30 and 10.30-12.00, when average queue times were 5 minutes 41 seconds and 4 minutes 54 seconds
- In London and the north of England, where average queue times were 6 minutes 10 seconds and 4 minutes 30 seconds. In London, almost a quarter of mystery shoppers had to wait more than 10 minutes to be served

Conversely, queues moved quickest:

- On Thursdays (3 minutes 47 seconds) and Fridays (3 minutes 23 seconds), with just under half (49%) of all mystery shoppers seen within 1 minute on Friday.
- Between 9.00-10.30 (3 minutes 16 seconds) and 13.00-14.00 (3 minutes 52 seconds), when three fifths of customers were seen within 2 to 3 minutes
- In Wales and Scotland, where average queue times were 2 minutes 10 seconds and 3 minutes respectively. In these two regions, Northern Ireland and the South & West, almost 85% of customers were seen within 5 minutes

In general, as in 2007, time spent queuing correlates closely with the number of people in the queue ahead – working out as approximately 50 seconds per person. This was slightly less for Crown branches (46 seconds) and slightly more for franchises (1 minute 5 seconds).

**Table 3.6 Time spent waiting in queue, by region**

	Base size	Time spent in queue
OVERALL MEAN	374	4 min 20 sec
Greater London	80	<b>6 min 10 sec</b>
South East	37	4 min 10 sec
South & West	34	3 min 10 sec
East	26	4min
Midlands	41	4min
North	79	<b>4min 30 sec</b>
Scotland	37	<b>3min</b>
Wales	22	<b>2 min 10 sec</b>
Northern Ireland	18 <sup>1</sup>	4min

Compared with 2007, waiting times have stabilised despite closures.

- Average waiting time has decreased from 4 minutes 50 seconds to 4 minutes 20 seconds, but is still 10 seconds longer than the 2006 average queue time
- The proportion of people waiting for more than 5 minutes has also decreased, but is still 2% higher than in 2006

<sup>1</sup> Low base size

Once again it is hard to assess whether this due to the success of initiatives aimed at reducing queue lengths and waiting times or to customers not migrating following post office closures in their areas. Additionally, as noted earlier, WHSMith has taken over some of the worst performing Crown post offices therefore it is reasonable to conclude that such franchise activity will have artificially improved the results for 2008 overall and Crown post office waiting times.

The overall improvement does, however, mask a decline in performance in some regions:

- In London, average queue time increased by 20 seconds
- Although average queue times in Northern Ireland are still below average, they have increased by more than a minute since 2007

Conversely:

- In Wales, queue time has almost halved since 2007

**Table 3.7 Time spent waiting in queue compared with 2007 and 2006**

	Crown	Franchise	Total
2008	<b>5 mins 40 sec</b>	<b>3 mins 10 sec</b>	<b>4 mins 20 sec</b>
2007	6min	3min 50 sec	4min 50sec
2006	5min 20sec	3min	4min 10 sec

2008 weighted base: Crown (169) and Franchise visits (205)

**Table 3.8 Proportion of queues lasting longer than 5 minutes compared with 2007 and 2006**

	Crown	Franchise	Total
2008	<b>38%</b>	<b>18%</b>	<b>28%</b>
2007	41%	22%	31%
2006	36%	16%	26%

2008 weighted base: Crown (169) and Franchise visits (205)

### 3.3 Counter positions

The pace at which a queue moves will be affected by a variety of factors, but primarily by the number of counter positions available and the length of time spent with each customer.

Although there is a physical limit to the number of counters that each branch has, the proportion of counters made available for service is a factor that can be varied to better manage waiting times.

- The total number of counter positions that could be used to provide service ranged from 1 to 21, with an average of 6.2 counter positions
- As might be expected, Crown branches were more likely to have the space to offer more counters – 95% of franchises had fewer than 5 counters compared with 68% of Crowns

**Table 3.9 Total number of counter positions**

	Crown	Franchise	Total
Base	154	220	374
1-2	1%	13%	8%
3-4	6%	41%	25%
5-6	26%	32%	29%
7-9	40%	9%	23%
10+	26%	5%	15%
Mean number of positions	8.01	4.64	6.16

- However, on average only 52% of counters were actually open and accepting customers
- Although Crown branches generally had more counter positions than franchises (8.0 compared with 4.6), franchises generally had a greater proportion of their counters open (see table 3.10).

**Table 3.10 Number of counter positions and proportion open**

	Crown	Franchise	Total
Total number of counter positions	8.0	4.6	6.2
Number of open counter positions	4.0	2.5	3.2
Proportion of counter positions open	50%	54%	52%

At a regional level, Wales and the South East were the regions with the greatest proportion of windows open (56% and 55%) and Northern Ireland and the Midlands had the lowest proportion open (49% and 48%). However, the proportion of windows open in other regions generally clustered around 50%.

*“Customers were complaining about the lack of counter positions which were open, and the lack of customer advisors.”*

*[Crown, South East]*

*“[4 windows serving] I found this unacceptable as there were 9 counters. I thought that more of them should have been open.”*

*[Franchise, London]*

This frustration is particularly aggravated when queues are long and additional staff members are visible, but not serving behind counters:

*“There were several workers floating about behind the counters but only 5 were dealing with customers.”*

*[Crown, East]*

**Table 3.11 Number of counter positions and proportion open per region**

	Base	Total number of counter positions	Number of open counter positions	Proportion of counter positions open
OVERALL MEAN	374	6.2	3.2	52%
Greater London	80	6.7	3.5	52%
South East	37	5.9	3.2	55%
South & West	34	5.7	2.9	50%
East	26	6.7	3.4	51%
Midlands	41	6.5	3.1	48%
North	79	6.8	3.5	52%
Scotland	37	4.9	2.6	53%
Wales	22	4.5	2.5	56%
Northern Ireland	18	5.8	2.9	49%

Overall, there is little variation in the numbers of counters open, which suggests that this is not being used as a method to manage queue lengths and waiting times. For example, a comparison with table 3.11 shows that only half of available counters were open in London despite average waiting times of over 6 minutes.

Analysed by day of week, Mondays were the day when the greatest proportion of counters were open (56%), and Saturdays had the lowest (49%) proportion open. However, both these days (Mondays and Saturdays) were the days with the longest queues and waiting times.

**Table 3.12 Number of counter positions and proportion open by day of week**

	Base	Total number of counter positions	Number of open counter positions	Proportion of counter positions open
OVERALL MEAN	374	6.2	3.2	52%
Monday	57	6.2	3.5	56%
Tuesday	53	6.3	3.3	52%
Wednesday	47	6.5	3.3	51%
Thursday	63	6.1	3.1	50%
Friday	82	5.8	3.0	53%
Saturday	73	6.3	3.1	49%

There is little variation in the proportion of windows open by time of day (see table 3.13):

- 16.30-17.30 was the time slot with the highest proportion of open counters (55%) compared with 51% at 10.30-12.00, 12.00-13.00 and 14.00-16.30

**Table 3.13 Number of counter positions open by time of day**

	Base	Total number of	Number of open	Proportion of
--	------	-----------------	----------------	---------------

		counter positions	counter positions	counter positions open
OVERALL MEAN	374	6.2	3.2	52%
9.00-10.30	96	5.3	2.7	52%
10.30-12.00	74	6.1	3.1	51%
12.00-13.00	64	6.6	3.4	51%
13.00-14.00	38	6.2	3.2	52%
14.00-16.30	79	6.7	3.5	51%
16.30-17.30	22	6.9	3.8	55%
After 14.00	101	6.8	3.5	52%

Post office branches which experienced lower than average queue times had a slightly higher proportion of open counters than branches with higher than average queue times (50% vs. 53%). What is also noticeable, however, is that branches with lower than average queue times also have a lower than average total number of counters (5.50 compared with an average of 6.16) whereas branches with higher than average queue times had 7.27 counter positions on average. Similarly, the number of counter positions open and accepting customers was fewer for branches with lower than average queue times (2.91 vs. 3.63).

This could suggest that branches with lower than average queue times are smaller branches which would therefore be expected to be handling lower volumes of traffic.

Similarly, more detailed analysis into the unweighted data reveals that franchises tend to vary the number of counters open throughout the day and week more than Crown branches. For instance, franchises open a significantly higher proportion of counters on Monday (62% compared to 41% in Crown branches) but not on Thursday which is another peak day (57% compared to 52%). Franchises also open a higher proportion of counters during the morning peak (63% compared to 51% in Crown branches).

**Table 3.14 Proportion of counters open by day of week (Crown vs franchises)\***

	Percentage of open positions		
	Total (%)	Crown	Franchise
OVERALL	54%	48%	57%
Mon	53%	41%	62%
Tue	51%	46%	55%
Wed	52%	47%	58%
Thur	55%	52%	57%
Fri	55%	49%	59%
Sat	53%	53%	53%

\*Unweighted data – hence the discrepancies to the numbers shown in previous tables

**Table 3.15 Proportion of counters open by time of day (Crown vs franchises)\***

	Percentage of open positions		
	Total (%)	Crown	Franchise
OVERALL	54%	48%	57%
9:00 – 10:30	59%	51%	63%
10:30 – 12:00	56%	50%	60%
12:00 – 13:00	49%	49%	50%
13:00 – 14:00	52%	47%	56%
14:00 – 16:30	53%	45%	59%
16:30 – 17:30	46%	46%	45%
After 14:00	50%	45%	54%

\*Unweighted data – hence the discrepancies to the numbers shown in previous tables

Compared with 2007 and 2006, the proportion of windows open in 2008 when the mystery shoppers visited has decreased, as have the overall average numbers of counters open across both types of post office:

- Overall average down from 3.58 to 3.18
- Crown average down from 4.54 to 4.00
- Franchise average down from 2.78 to 2.50

Interestingly however, average waiting time is down from 2007 despite the smaller proportion of counters open. This raises the question of whether this is attributable to other initiatives aimed at reducing queue lengths, or a bleed of customers due to the ongoing closure programme.

**Table 3.16 Proportion of counter positions open compared with 2007 and 2006**

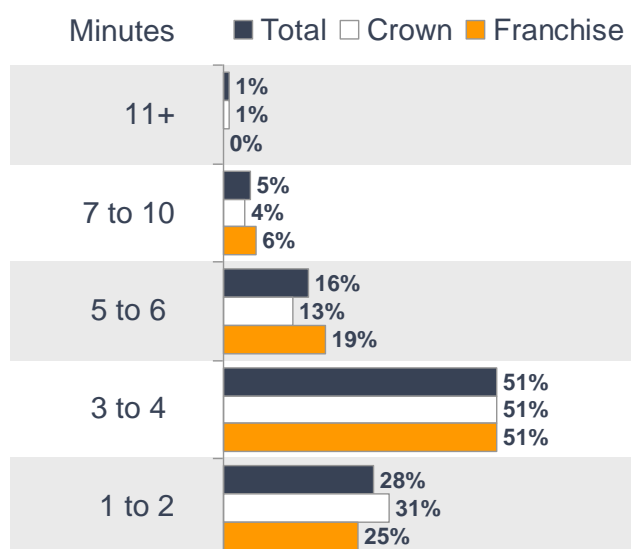
	Proportion of counter positions open		
	2008	2007	2006
OVERALL MEAN	52%	60%	56%
Greater London	52%	62%	<b>58%</b>
South East	<b>55%</b>	58%	<b>50%</b>
South & West	50%	<b>51%</b>	55%
East	51%	57%	56%
Midlands	<b>48%</b>	63%	<b>53%</b>
North	52%	<b>56%</b>	<b>59%</b>
Scotland	53%	<b>68%</b>	<b>58%</b>
Wales	<b>56%</b>	58%	56%
Northern Ireland	<b>49%</b>	<b>64%</b>	56%

### 3.4 Customer Advisors

#### 3.4.1 Time spent with customer advisor

As indicated previously, the time that customer advisors spend with individual customers can have implications for queue times. However, adequate time must be given in order to ensure a good standard of service and product advice.

**Table 3.17 Time spent with customer advisor**



Weighted Base: Crown (169) and Franchise (205)

On average, customer advisors spent 3 minutes and 35 seconds with a mystery shopper – with very similar results for both Crown offices and franchised offices and little variation by time and day of visit. This is a positive result, suggesting that on an overall level, the enquiries and scenarios posed by our study took a similar amount of time to be dealt with across all branches.

**Table 3.18 Average amount of time spent with customer advisor**

	Crown	Franchise	Total
Mean	3min 30sec	3min 40sec	3min 35sec

More time than the average was spent with customer advisors in the East, Wales and London, with the longest average time in the East (4 minutes 50 seconds). Advisors in the North spent the least amount of time (3 minutes).

**Table 3.19 Average amount of time spent with customer advisor by region**

	Base	Time spent with customer advisor
OVERALL MEAN	371	3 min 35 sec
Greater London	77	3min 50sec
South East	37	3min 35sec
South & West	34	3min 30sec
East	26	4min 50sec
Midlands	41	3min 30sec
North	79	3min
Scotland	37	3min 25sec
Wales	22	4min 5sec
Northern Ireland	18	3min 20sec

Since 2007, the time spent with a customer advisor increased across all regions except North and Midlands, where time spent decreased by approximately 1 minute. Time spent with a customer advisor in the East almost doubled since 2007 (increased by 2min 5sec). Although a slight increase in the amount of time spent with customer advisors could be attributable to the addition of the proof of postage request, a decrease in time spent is more difficult to explain.

### 3.4.2 The manner of the customer advisor

Mystery shoppers were asked whether the manner of the customer advisor dealing with their enquiry could accurately be described by the following descriptions (see table 3.20). Overall, a high proportion of customer advisors (94%) were rated as polite and helpful with information clearly delivered.

**Table 3.20 Manner of the customer advisor**

Customer advisor was....	Crown	Franchise	Total
Polite	97%	92%	94%
Generally helpful	97%	91%	94%
Spoke clearly	96%	92%	94%
Easy to understand	94%	88%	91%
Listened carefully	93%	88%	91%
Calm/ not stressed	95%	86%	90%
Dealt with customer efficiently	93%	83%	87%
Friendly	92%	77%	84%
Probed for additional information	70%	63%	66%

Franchise offices performed less well than Crown offices on all criteria, with the greatest difference relating to 'wearing a name tag' - 79% of Crown office customer advisors wore a name tag compared with only 44% of franchise advisors.

*"The customer advisor was very helpful and went out of her way to provide me with all the information I needed."*

[Crown, Wales]

*"Thanked me for my custom, generally maintained a polite demeanour."*

[Crown, London]

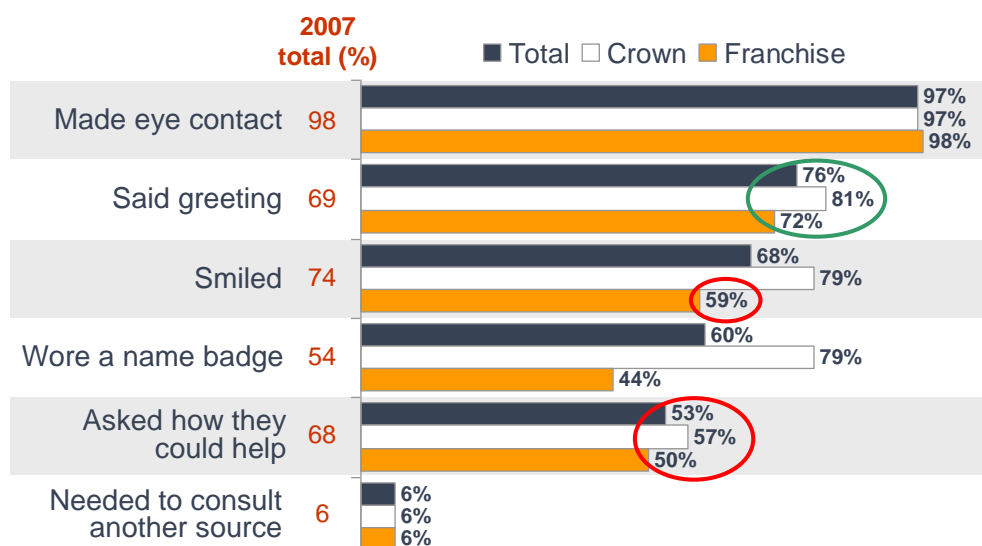
*"Advisor was not rude but generally unhelpful."*

[Franchise, Wales]

*"He was reading newspaper and looked quite disinterested in serving me."*

[Franchise, East]

**Table 3.21 Whether the customer advisor...**



However, not all customer advisors made eye contact with the mystery shopper (97%, down 1% from 2007), and overall, only 76% verbally greeted the customer – an increase of 7% from 2007 but still unacceptably low. Just over two thirds smiled (68%), which is down considerably from 2007 (74%). There has also been a 15% decline in the proportion of customer advisors asking how they could help, compared with 2007.

*“The advisor barely even looked up when I got to the counter. He also didn't say ‘Goodbye’, ‘Thank you’ or anything.”*  
[Franchise, South East]

*“The customer advisor did not smile at any point throughout the whole time I was being served.”*  
[Franchise, South East]

**Table 3.22 Manner of the customer advisor by region**

	Polite (%)	Generally helpful (%)	Spoke clearly (%)	Easy to understand (%)	Listened carefully (%)	Calm/ not stressed (%)	Dealt with customer efficiently (%)	Friendly (%)	Probed for additional information (%)
OVERALL MEAN	94%	94%	94%	91%	91%	90%	87%	84%	66%
Greater London	90%	<b>89%</b>	<b>82%</b>	<b>81%</b>	<b>83%</b>	<b>77%</b>	<b>72%</b>	<b>70%</b>	<b>58%</b>
South East	<b>85%</b>	95%	89%	95%	86%	85%	78%	78%	62%
South & West	98%	98%	94%	92%	94%	86%	89%	93%	72%
East	96%	94%	96%	94%	94%	96%	96%	92%	63%
Midlands	95%	90%	<b>100%</b>	95%	<b>95%</b>	89%	90%	85%	<b>79%</b>
North	97%	95%	96%	94%	<b>95%</b>	<b>100%</b>	<b>97%</b>	84%	68%
Scotland	97%	95%	<b>100%</b>	95%	92%	97%	95%	<b>95%</b>	65%
Wales	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>96%</b>	93%	<b>100%</b>	93%	<b>95%</b>	63%
Northern Ireland	98%	96%	98%	91%	87%	87%	89%	92%	73%

Table 3.22 looks at regional differences in the manner of customer advisors serving the mystery shoppers:

- Greater London was the only region where agreement with the descriptions provided was consistently below average on all measures and had the lowest levels of agreement on **all** criteria except politeness
  - ◆ Customer advisors in the South East were deemed the most impolite, scoring 10% below average
- Wales scored very highly and achieved 100% for several factors
- Scotland, North and the East of England were the regions which also performed above or in line with average scores, although North was the only region to do so on all measures (Scotland and East were slightly less likely than the average to probe for further information)

*“He just gave the briefest answer possible for each question and did not probe further.”*  
[Franchise, London]

*“He seemed irritated at my questions and in a hurry to finish the conversation.”*  
[Franchise, South East]

*“They seemed busy and I had to engage them with my question before they paid attention to me.”*  
[Franchise, London]

Although the manner of customer advisors was generally well rated, once again, only a minority apologised for the wait to be served (just 4% of advisors – the same proportion as last year).

*“I thought that it would have been appropriate for the Customer Advisor to apologise, as it was evident that the queue was long”.*  
[Franchise, London]

### 3.4.3 Quality of advice

To assess the quality of advice and information provided by customer advisors, mystery shoppers presented customer advisors with two scenarios:

- Scenario 1: Pricing in Proportion (PiP) and proof of postage: Enquiry about the cost of posting a first class letter in a flat A4 envelope to an address in the UK, and what would be required to show that the sender had posted it
- Scenario 2: Special Delivery - Enquiry about the best method of sending a card and present for a niece’s birthday/ cousin’s wedding
  - ◆ Upon prompting on the value of the present, mystery shoppers mentioned that it contained £40 worth of vouchers
  - ◆ Upon prompting on the urgency, they mentioned that it had to arrive the next day

These two scenarios were only introduced in 2007; therefore comparison with 2006 results is not possible. The enquiry about proof of postage was added to scenario 1 for 2008.

#### Scenario 1: Pricing in proportion and proof of purchase

The new Pricing in Proportion system was introduced in August 2006 to take into account the actual size (length and width) of an item, in addition to its weight, when pricing its postage.

The scenario devised for the 2007 survey tested the customer advisor’s awareness and knowledge of PiP and in particular, the cost of sending a flat A4 sheet of paper through the mail, first class to a UK address. The PiP rules mean that it would cost more to send an A4 letter than it would if the sheet of A4 was folded and placed in a smaller envelope.

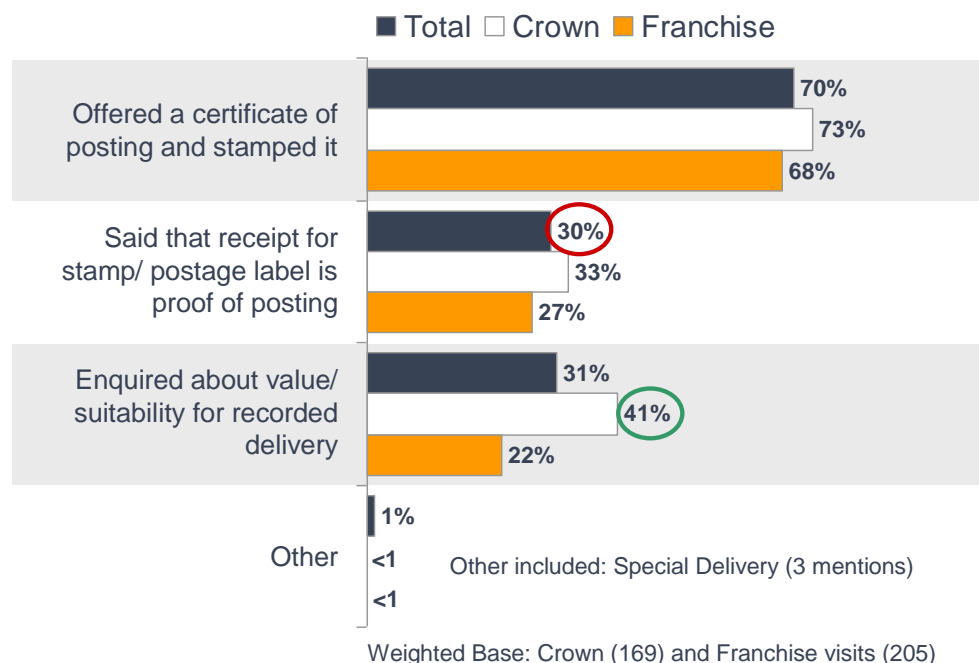
As in 2007, 99% of Customer Advisors sold the correct value stamp for the letter (52p). However, performance was not perfect in either Crown or franchised offices, with a variety of different stamps offered instead: 114p (offered 5 times), 38p, and 48p (offered once each).

However, some customer advisors were more knowledgeable and able to provide additional information regarding the new pricing structure:

- 25% of customer advisors provided additional advice or information regarding pricing in proportion – a good increase from 2007 when only 13% provided additional information.
  - ◆ This advice or information included advisors enquiring whether the letter contained anything of value and whether it needed to arrive at a certain time, whether proof of postage was required and explaining that it would be cheaper to send if the letter was folded in half
- Additional information was most likely to be provided by advisors in the Midlands, Wales and London.

- ◆ In 2007 London had also been a region where advisors were more likely to provide additional information about PiP, along with the South East

**Table 3.23 Proof of posting**



When asked for proof of posting, 70% of advisors offered a certificate of posting and stamped it. However, over a quarter of advisors (30%) wrongly claimed that the receipt for the stamp or postage label was proof of posting. Although a minority, this is still an unacceptable proportion of customers being misled about the form of proof of postage acceptable for a compensation claim to be upheld.

Most concerning though was that 6 mystery shoppers (5 of whom visited franchised branches) commented that staff seemed unwilling to give them a certificate of posting. Although this affected a very small proportion of the shoppers, it is worrying that any genuine customer could be put off from pursuing a potentially important request by the attitude of the customer advisor serving them.

*“He seemed annoyed that I required proof of posting.”*  
[Franchise, Greater London]

*“It was apparent that the advisor did not see the need for a proof of posting, due to the fact that the item was of little value.”*  
[Franchise, N. Ireland]

*“The advisor said that the only way that I could get proof of postage would be by paying £4.60 for special delivery.”*  
[Franchise, N. Ireland]

Nearly a third of advisors (31%) sensibly enquired about the value of the letter and its suitability for recorded delivery, although almost twice as many of these customer advisors were from Crown offices than franchised offices (41% vs. 22%).

### Scenario 2: Special delivery

The second scenario presented by mystery shoppers to customer advisors was designed to test whether advisors were correctly asking the series of questions recommended by Post Office Ltd's touch-screen 'Horizon' IT system to provide the correct product advice. The scenario mentioned a card and present for a special occasion, which should have led to customer advisors enquiring about the contents and its value, and whether the card and gift needed to arrive by a certain date.<sup>1</sup>

**Table 3.24 Scenario 2: Advice regarding the sending of a card and vouchers**

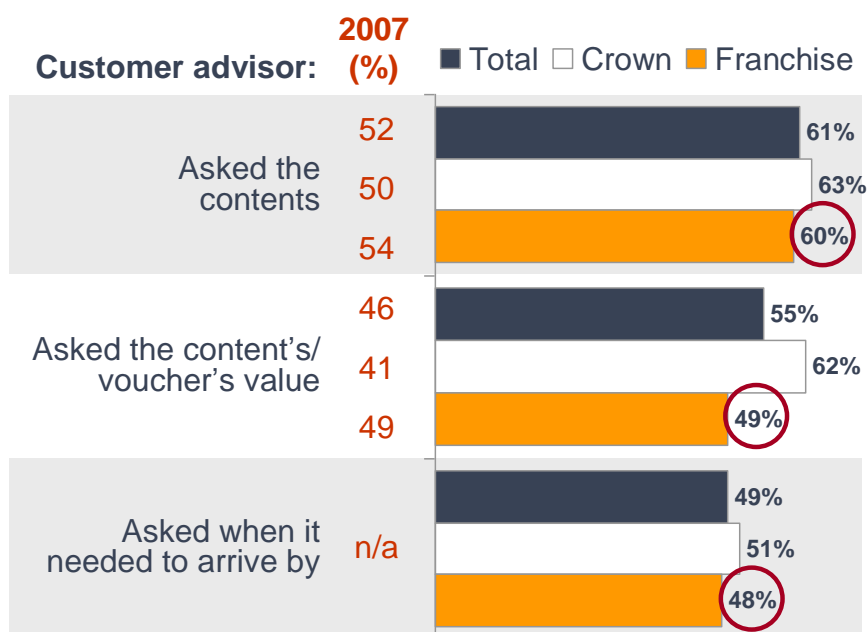


Chart: 2008 Weighted Base: Crown (169) and Franchise visits (205)

<sup>1</sup> In 2007 it was not recorded whether customer advisors enquired about any time sensitivity.

**Table 3.25 Customer advisors recommending special delivery**

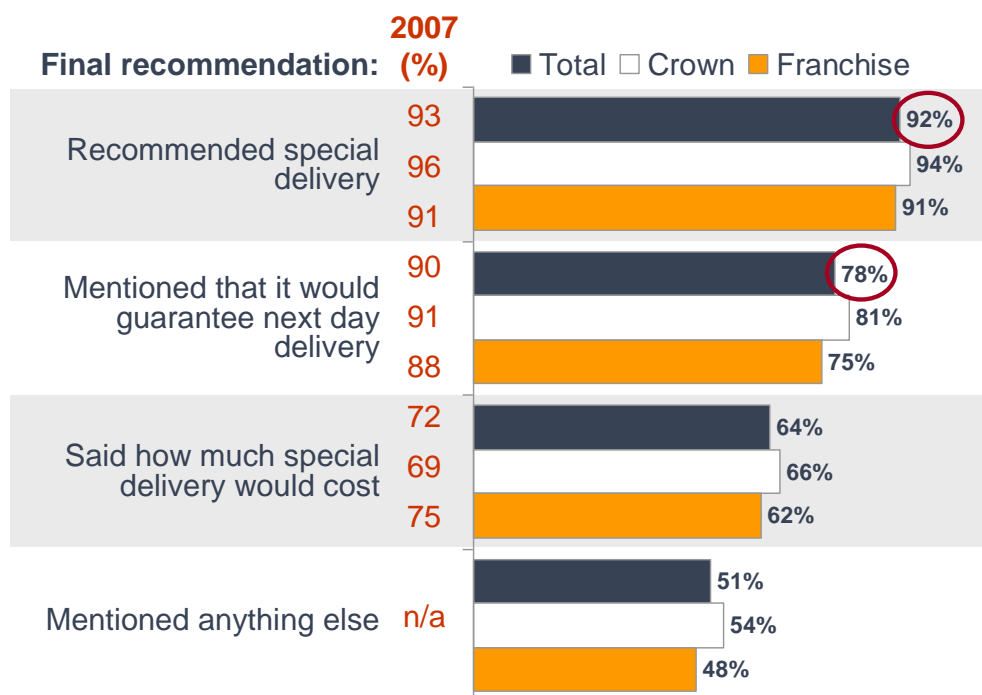


Chart: 2008 Weighted Base: Crown (169) and Franchise visits (205)

The great majority of advisors (92%) recommended special delivery, but it is surprising that 8% failed to make this recommendation for a scenario so clearly designed to prompt a recommendation of special delivery.

The majority of advisors who did not recommend special delivery did not probe for any additional information. Instead, they wrongly recommended recorded delivery or ordinary first class delivery

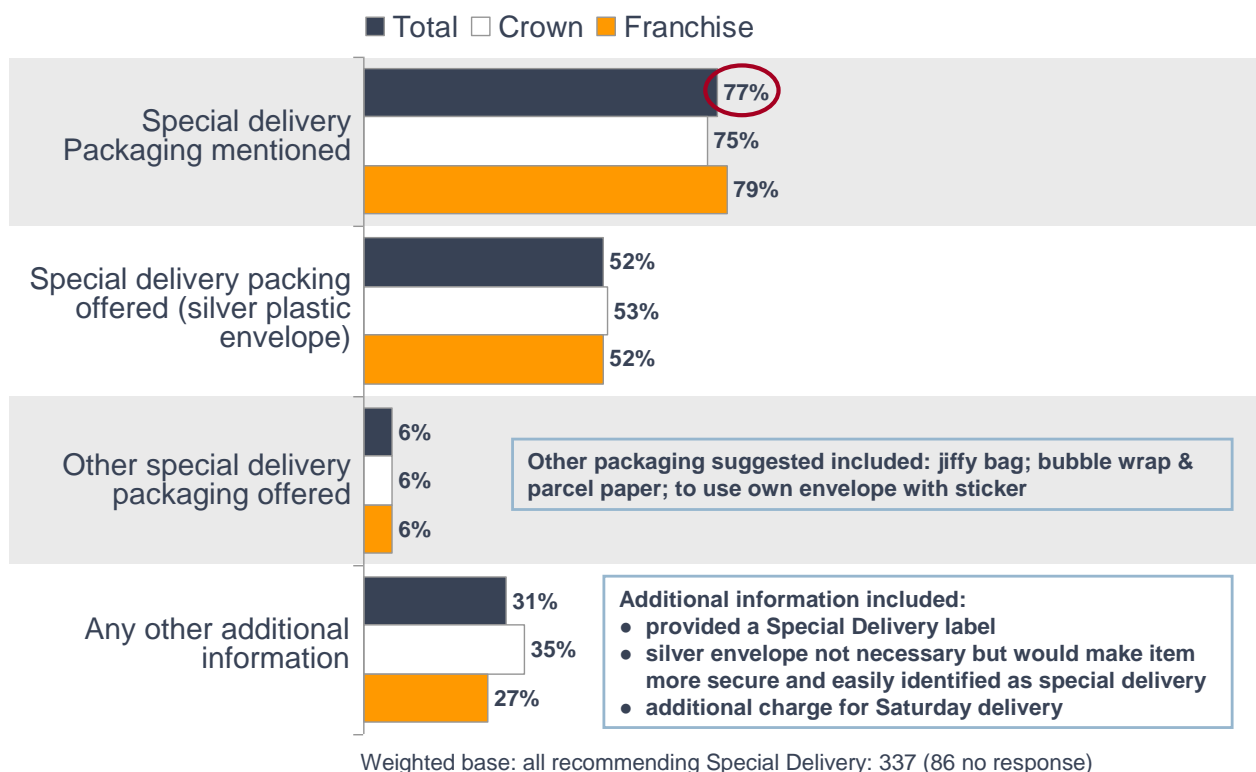
- Fewer than two thirds of advisors (61%) enquired about the contents
- Just over half (55%) enquired about the value of the contents
- Fewer than half of all advisors (49%) enquired about time sensitivity

Over three quarters (78%) mentioned that it would guarantee next day delivery and just under two thirds (64%) said how much special delivery would cost. Over half of all advisors provided additional details about the service, for example £50 as standard compensation for loss or damage, and online tracking.

Compared with 2007:

- The proportion asking for additional details (regarding the contents and value) increased by almost 10%, mainly driven by Crown office improvement
- There has been a slight decrease in the proportion of customer advisors recommending special delivery (down to 92% from 93%)
- A marked decrease in the proportion of customer advisors mentioning that special delivery guarantees next day delivery (down from 90% to 78%)
- A 13% decrease in the proportion of customer advisors in franchised branches informing mystery shoppers of the cost of special delivery (down from 75% to 62%)

**Table 3.26 Special delivery packaging**



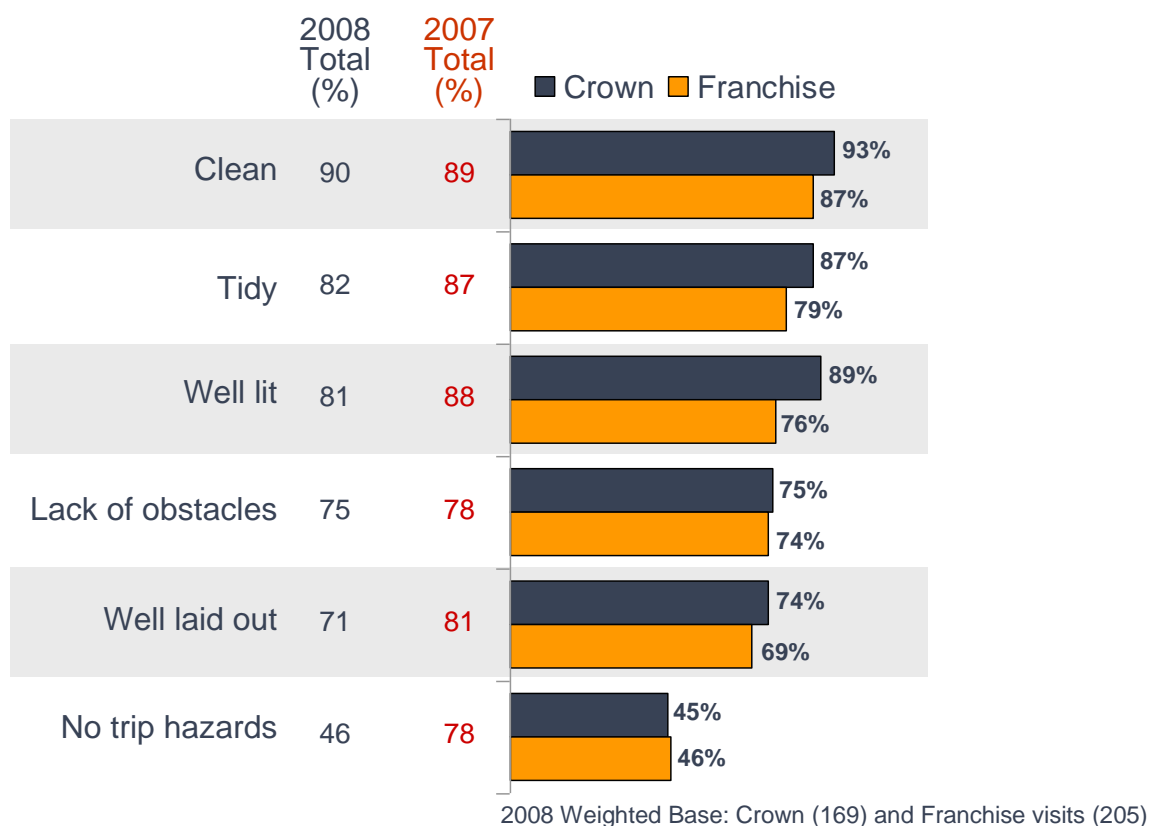
- ◆ Just over two thirds of advisors (77%) mentioned the special delivery packaging but only around half (52%) offered the packaging.
- ◆ Under a third of advisors gave additional information regarding packaging, like providing a special delivery label or mentioning an additional charge for Saturday delivery.
- ◆ 6% offered other kinds of packaging such as jiffy bags, bubble wrap and parcel paper, or informed customers that they could simply utilise their own envelope and just attach the special delivery sticker

Crown offices consistently performed better than franchise offices on all measures in this area.

### 3.5 The Interior of the Post Offices

#### 3.5.1 Post office interiors

**Table 3.27 Description of post office interior**



In line with 2006 and 2007, a large proportion of post office branches were highly rated in terms of their interiors. 90% of all surveyed branches were described as ‘clean’, 82% as ‘tidy’ and 81% as ‘well lit’.

*“Nice airy interior, with a clean, efficient feel to it, yet a friendly atmosphere.”*  
[Crown, South East]

However, all scores apart from cleanliness have decreased slightly compared with 2007, especially the ‘well laid out’ measure which decreased by 10%. In general, Crown offices are rated slightly higher than franchises.

*“It was rather cluttered in the shop. There was no direct route to walk through.”*  
[Franchise, Northern Ireland]

75% of branches were free of obstacles and 71% were well laid out. However, over half of branches visited were found to have trip hazards (54%). These, however, tended to be temporary in nature and could be easily removed e.g. boxes of stock left on the floor, some products that had fallen off a shelf.

*“Stacks of beer blocking the aisles, impeded walking access, and would render wheelchair access problematic to say the least.”*

[Franchise, South West]

*“There was a middle display that may have made it slightly difficult for a wheelchair customer to negotiate.”*

[Crown, Scotland]

**Table 3.28 Description of post office interior by region**

	Clean (%)	Tidy (%)	Well lit (%)	No obstacles (%)	Well laid out (%)	No trip hazards (%)
OVERALL MEAN	90%	82%	81%	75%	71%	46%
Greater London	<b>81%</b>	<b>69%</b>	77%	72%	74%	45%
South East	88%	70%	<b>72%</b>	76%	<b>78%</b>	<b>67%</b>
South & West	95%	87%	92%	<b>68%</b>	<b>60%</b>	48%
East	94%	<b>98%</b>	92%	<b>82%</b>	<b>78%</b>	47%
Midlands	90%	79%	80%	70%	64%	48%
North	89%	87%	79%	75%	70%	40%
Scotland	92%	92%	81%	78%	73%	<b>38%</b>
Wales	<b>100%</b>	94%	<b>93%</b>	80%	76%	40%
Northern Ireland	98%	87%	87%	78%	64%	40%

Weighted base: Crown (169) and Franchise visits (205)

Looking at the regional differences, branches in Greater London scored lowest on cleanliness (81%) and tidiness (69%) compared with all other regions whereas branches in Wales scored particularly highly on cleanliness (100%) and being well lit (93%).

Only 38% of Scottish branches surveyed were free of trip hazards, a dramatic contrast to branches in the South East where 67% were free of trip hazards.

### 3.5.2 Availability of customer service leaflet

The availability of Post Office Limited’s customer service leaflet ‘We’re here to help’ is very poor in Crown offices and franchised offices alike, but should be available at all of them.

The leaflet was readily accessible or on display in fewer less than two in five of all branches visited – only 37% overall had the leaflet available. This is a further decline from 2007 when 49% of Crowns and 44% of franchises displayed the leaflet. Interestingly, often, a dedicated space for leaflets was provided – but was empty.

*“There was an abundance of other leaflets but not this particular one.”*

[Franchise, South West]

In franchised branches this may be attributable to restrictions on space and competing literature.

*“No leaflets on display. I noted some leaflets were behind the screen but were concealed by a sticker advertising top-up for mobile phone.”*

[Franchise, Scotland]

London and the North were the worst for leaflet availability – almost three quarters of branches did not have them. In contrast, the Midlands was the only region where more than half of branches had leaflets.

## 3.6 The Exterior of the Post Offices

### 3.6.1 Signage and information

**Figure 3.29 Opening times and lozenge signs on display**

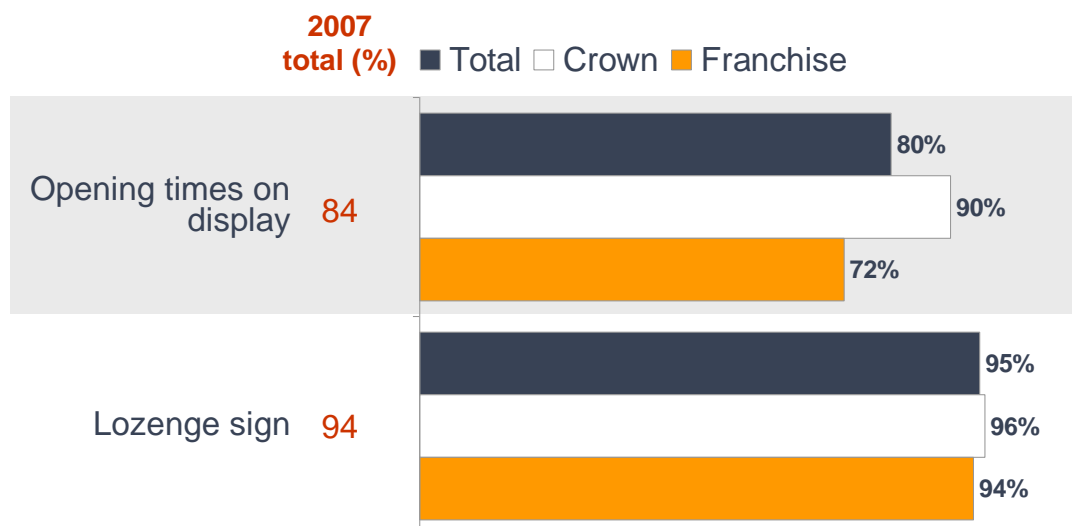


Chart: 2008 Weighted Base: Crown (169) and Franchise visits (205)

Display of office opening hours varied considerably, but the majority of branches, especially Crowns, did have opening times (80%) on display - 15% lower than in 2007.

Looking at regional variations, 86% of branches in Scotland had opening times on display compared with only 68% in Northern Ireland.

A greater proportion had a lozenge post office sign on display – 94% of franchises and 96% of Crowns. The East was the only region where all post offices had a lozenge sign outside.

Between 2004 and 2007 there was an increase in the proportion of post office branches with a variety of services on display outside the post office, in particular, for services such as:

- postal services (57% in 2006, 71% in 2007)
- bill payments (44% in 2006, 58% in 2007)
- savings products (27% in 2006, 53% in 2007)
- cash withdrawal (27% in 2006, 43% in 2007)
- home insurance (28% in 2006, 41% in 2007)

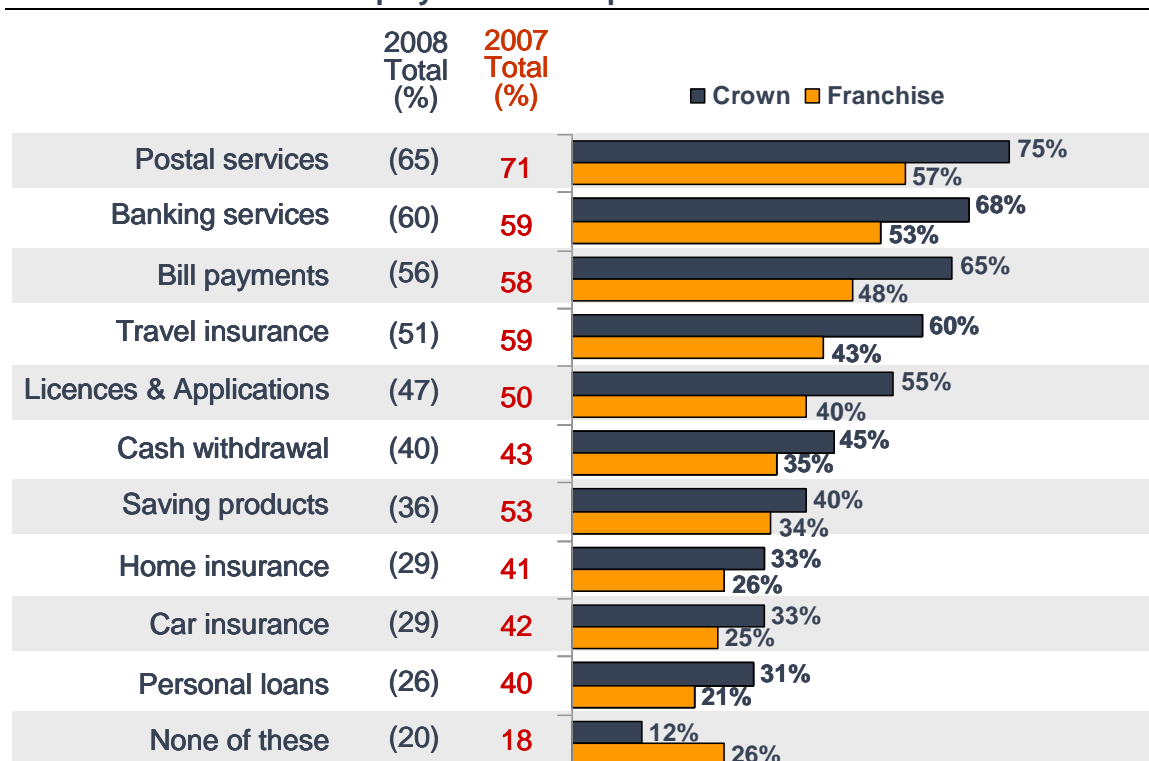
This increasing trend has not, however, continued from 2007 into 2008. In 2008, only two thirds of branches surveyed displayed postal services (65%), followed by banking services (60%) and bill payments (56%). However, there has still been an increase in the services on display compared with 2006 (excluding personal loans and car insurance).

Crown offices displayed their services much more frequently than franchise offices, but this could also have been because not all services were available at franchised offices.

The proportion of branches displaying certain services decreased considerably compared with 2007:

- Displays for saving products went down from over half (53%) in 2007 to 36% in 2008
- Displays for personal loans went down from 40% in 2007 to 26% in 2008
- Displays for car insurance went down from 42% in 2007 to 29% in 2008
- Displays for home insurance went down from 41% in 2007 to 29% in 2008

**Table 3.30 Services on display outside the post office**



2008 Weighted Base: Crown (169) and Franchise visits (205)

There has been little change in the proportion of branches displaying none of these services (20% compared with 18%). These branches tended to be in Scotland, Northern Ireland and London, and overall, Crowns are much better than franchises in displaying their services outside. A quarter of franchises did not display any services at all, but once again, this could be due to the franchised business competing for window space with the post office.

### 3.6.2 Exterior appearance

The exterior appearance of branches was seen as positive for a high proportion of branches and there were no noteworthy differences between Crown and franchise offices.

*“Exterior clean and tidy – windows clean, no litter.”*  
[Crown, Scotland]

*“The overall exterior of the post office is clean and well presented”*  
[Franchise, Wales]

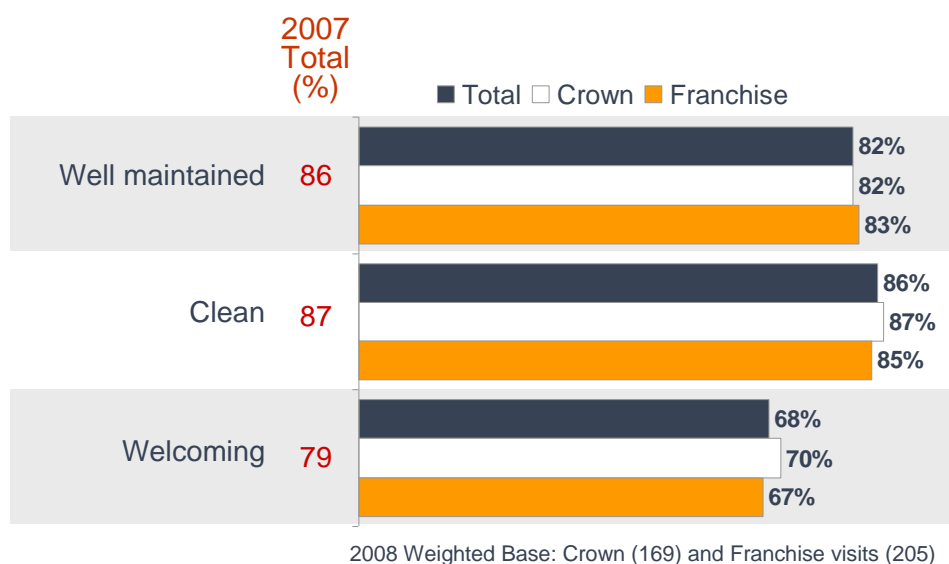
- Over 4 in 5 branches were reported as being clean (86%) and well maintained (82%), although slightly fewer were considered welcoming (68%) - this is a decrease from 2007, when 87% were rated clean, 86% as well maintained and 79% as welcoming.

- Generally, the exterior appearance was more highly rated in Wales, Northern Ireland, Scotland and the Midlands than in other regions.

There was still a minority of post offices with room for improvement in terms of exterior appearance:

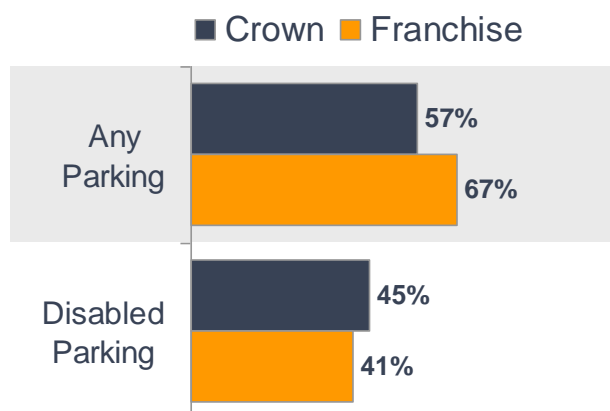
*“The post office looked dark and uninviting from the outside.”*  
[Franchise, North]

**Table 3.31 Exterior appearance**



### 3.7 Parking

**Table 3.32 Parking**



Over half the post offices (62%) had car parking nearby, but such facilities were far more likely to be available near franchise offices (67%) than Crown offices (57%).

Disabled parking was provided at 43% of all surveyed branches, 45% of visited Crown offices and 41% of franchise offices.

Provision of car parking was better in Scotland (81%), and below average in Wales and the North (53% each). Parking provision has increased from 2007 overall (54%) and in all regions apart from the Midlands and Northern Ireland, where it decreased.

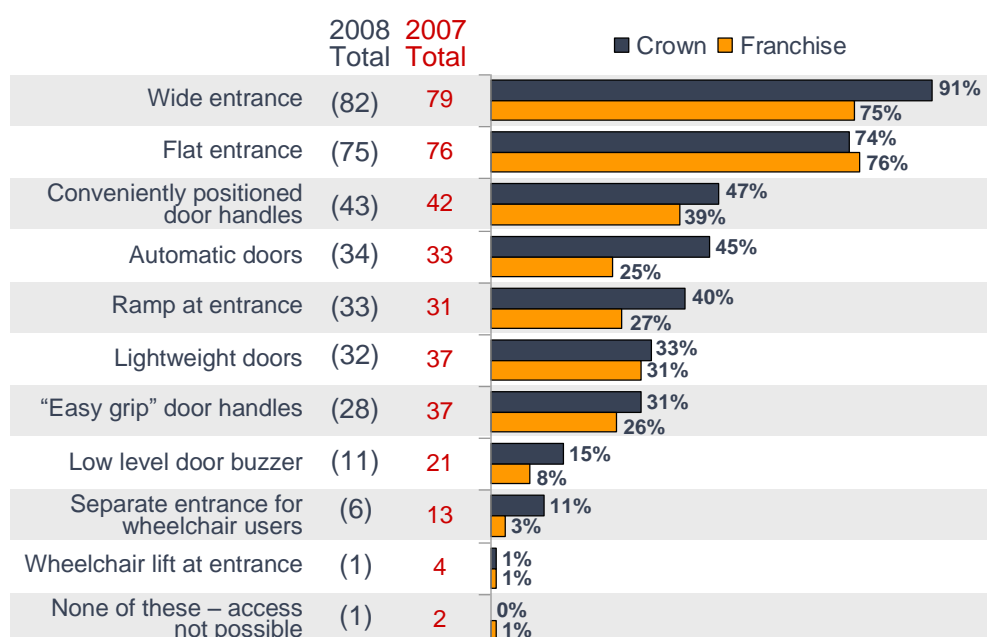
**Table 3.33 Car parking**

	Any car parking (%)		Disabled car parking (%)	
	2008	2007	2008	2007
OVERALL MEAN	62%	54%	43%	41%
Greater London	57%	51%	29%	34%
South East	73%	56%	53%	47%
South & West	71%	54%	58%	50%
East	67%	57%	49%	43%
Midlands	56%	63%	52%	46%
North	53%	45%	28%	35%
Scotland	81%	57%	62%	34%
Wales	53%	36%	38%	41%
Northern Ireland	73%	89%	60%	74%

Regionally, Scotland was more likely to offer disabled parking (62%) whereas Greater London (29%) and the North were least likely (28%). Compared with 2007, most regions provided more disabled parking, apart from Greater London, the North, Wales and Northern Ireland, where the proportion of disabled parking was lower in 2008.

### 3.8 Facilities for the Disabled

**Table 3.34 Accessibility for wheelchair users**



2008 Weighted Base: Crown (169) and Franchise visits (205)

A high proportion of branches visited had sufficiently wide (82%) and flat (75%) entrances. However, further facilities for wheelchair users were considerably sparser:

Just over a third of surveyed branches had conveniently positioned door handles (43%) and automatic doors (34%). Fewer branches had lightweight doors (32%), low level door buzzers (11%) and a separate entrance for wheelchair users (6%).

1% of visited branches were considered impossible for wheelchair users to access.

*“The door into the post office was a double door. However, it seemed that only one side was ever open, rendering wheelchair access impossible.”*

[Franchise, Northern Ireland]

*“Wheelchair access would be difficult if interior door had been closed e.g. in winter”*

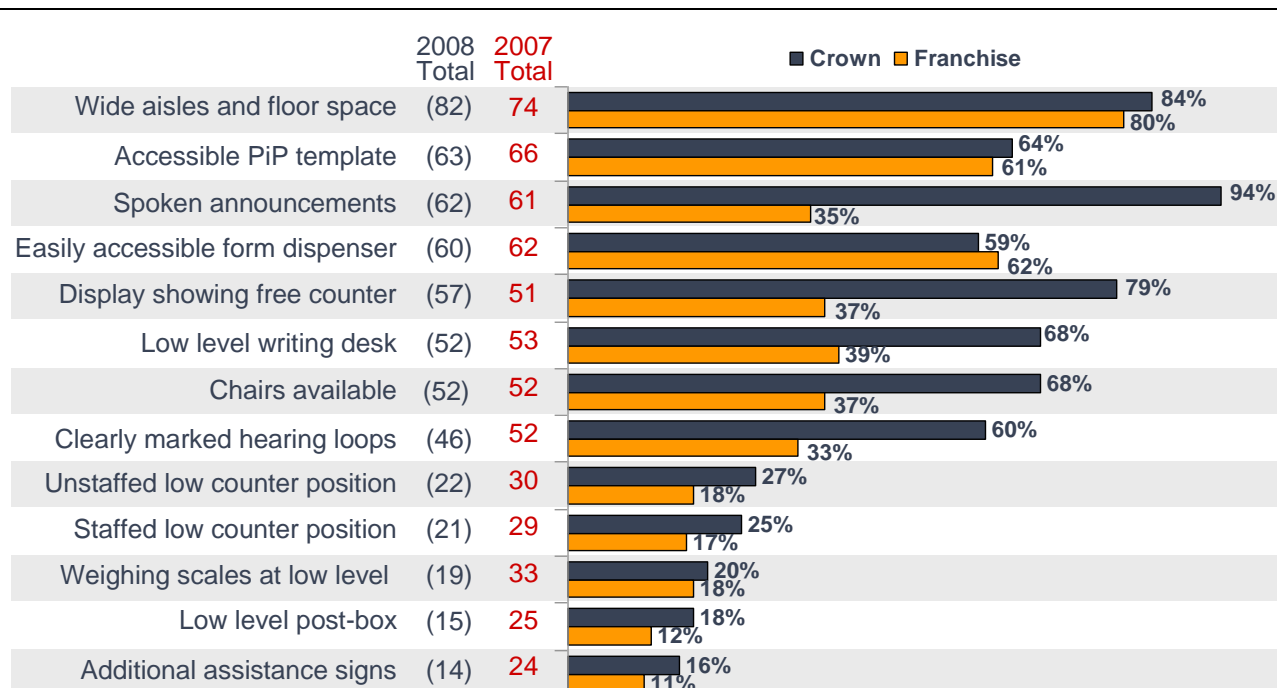
[Crown, London]

Some overall improvement could be seen since 2007 but the proportion of branches with low level door buzzer and separate wheelchair users’ entrance has halved since last year.

Crown offices are still leading for all measures apart from ‘flat entrance’, where franchise offices were slightly ahead.

The availability of other facilities for the disabled varies considerably but is generally better in Crowns than franchises.

**Table 3.35 Facilities for the disabled**



Weighted Base: Crown (169) and Franchise visits (205)

Over three quarters of visited branches had wide aisles and floor space. Accessible PiP templates (63%), spoken announcements (62%) and easily accessible form dispensers (60%) were also observed frequently. Over half of all branches had a display for showing free counters (57%), low level writing desks (52%) and chairs available (52%).

Crown offices were considerably more likely to have the facilities to cater for disabled customers than franchise offices, especially technological features:

- Spoken announcements were available in 94% of Crowns compared with 35% of franchises
- A display showing a free counter was noted at 79% of Crowns compared with 37% of franchises
- Clearly marked hearing loops were seen at 60% of Crowns and 33% of franchises

Several improvements were made from 2007, mainly an increase in wide aisles and floor space (82% compared with 74% in 2007) and in displays showing free counter (57% compared with 51% in 2007).

Big drops were observed for weighing scales at a low level (19% compared with 33% in 2007), low level post boxes (15% compared with 25% in 2007) and additional assistance signs (14% compared with 24% in 2007).

### 3.9 Conclusions and Focus for Improvement

Given the considerable upheaval experienced over the past year by the Post Office Network, this year's results have revealed a stabilisation in the network's performance. It was anticipated that the programme of closures would put more pressure on remaining branches, leading to longer queue times with potential knock-on effects for service quality. Instead we have seen a slight reduction from 2007 in the length and duration of queues. It is, however, unclear whether the improvements noted are attributable solely to an improving service or the inevitable bleed of some service users not migrating from branches closed during the Network Closure Programme, and the Crown network franchising some of its worst performing branches to WHSmith.

Despite having more counter positions available, franchised branches still out-perform Crown offices on measures such as queuing and proportion of counter positions accepting customers. Any improvement in Crown offices since 2007 were matched by improvements in franchises, but franchises still lag behind on service quality, display of available services, interior environment and facilities for disabled and wheelchair users.

Crown offices are still rated more highly for product knowledge and are more likely to recommend the correct services. There is, however, still room for improvement in ensuring that customer advisors ask all the relevant questions before recommending a service, and the provision of proof of postage is an area particularly in need of revision.

Both the interior and exterior of Crown offices were rated highly, with a high proportion displaying opening times and available services. Facilities for wheelchair users and disabled customers have generally improved since 2007 but of the four branches which demonstrated none of the listed accommodating features for wheelchair users, half were Crown offices.

The research suggests that the key areas of concern with respect to Crown offices are:

- Queuing: improvements are required to reduce the number of people in queues and the time spent waiting in them. Use of queue hosts could facilitate this.
- Proportion of open counters: Post Office Ltd need to improve their queue management by varying the number of counters open at peak times and opening more when necessary.
- Quality of advice: probing for further information and advice provided regarding proof of postage
- Accessibility for wheelchair users, for a limited number of branches

Franchised offices should focus on improving:

- Manner and friendliness of customer advisors
- Quality of advice: probing for further information, provision of service information and advice on proof of postage
- Facilities for the disabled and accessibility for wheelchair users
- Display of opening hours and available services

## 4. WHSmith Outlets

### 4.1 Background

As part of the Network Change Programme and following successful trials at six branches in 2006, 50 Crown offices have been relocated to WHSmith stores, with 70 of such franchises anticipated in total. This was a positive move enabling high street to keep their post offices with only a small change in location (an average of 250 metres from the original Crown office).

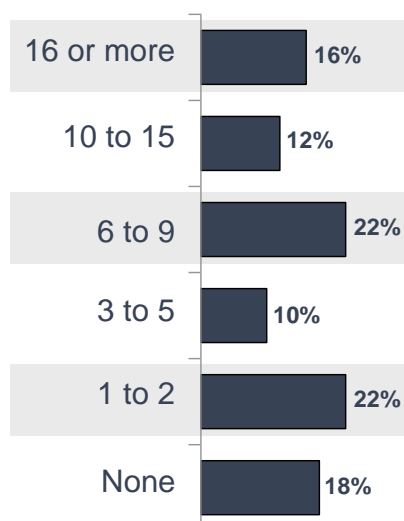
It is important to bear in mind that not only were the majority of the WHSmith branches visited newly installed, but they generally replaced Crown offices that were both poorly performing and running at a loss for Post Office Ltd. It could, therefore, be reasonably expected that several of these new franchises would inherit many of the problems of the old Crown office.

### 4.2 Main findings

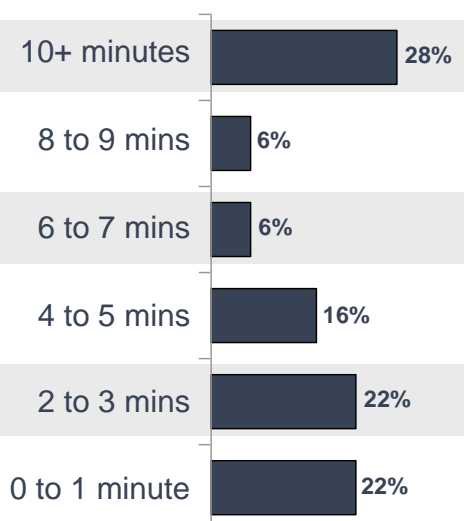
The main findings from the WHSmith outlets were as follows:

#### 4.2.1 Queue lengths and waiting times

**Table 4.1 Average queue length**



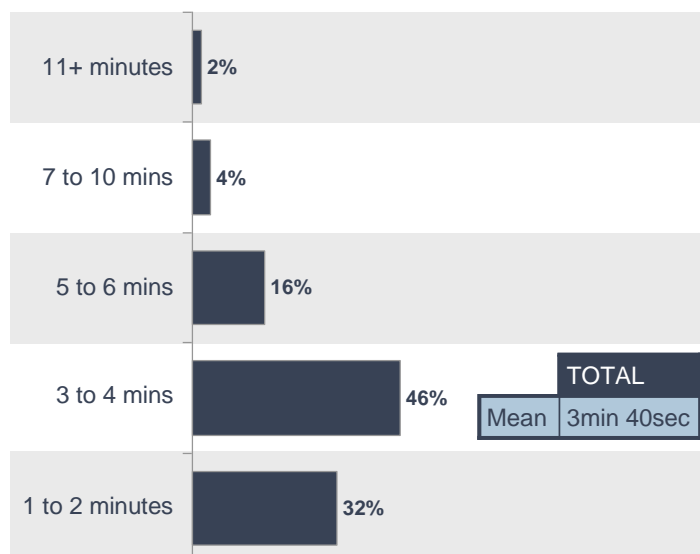
**Table 4.2 Time spent waiting in queue**



- Overall, customers spent an average of 6 minutes waiting in queues in WHSmith branches but almost two thirds waited for 5 minutes or less
- The average number of people in the queue was 7, with 50% in a queue of less than 5
- Waiting times in WHSmith branches were higher than in the Crown offices (5 minutes 40 seconds) and franchises (3 minutes 10 seconds) visited. These longer waiting times may be due to the fact that WHSmith franchises typically replaced Crown offices with very high volumes of traffic

## 4.2.2 Customer advisor

**Table 4.3 Time spent with customer advisor**

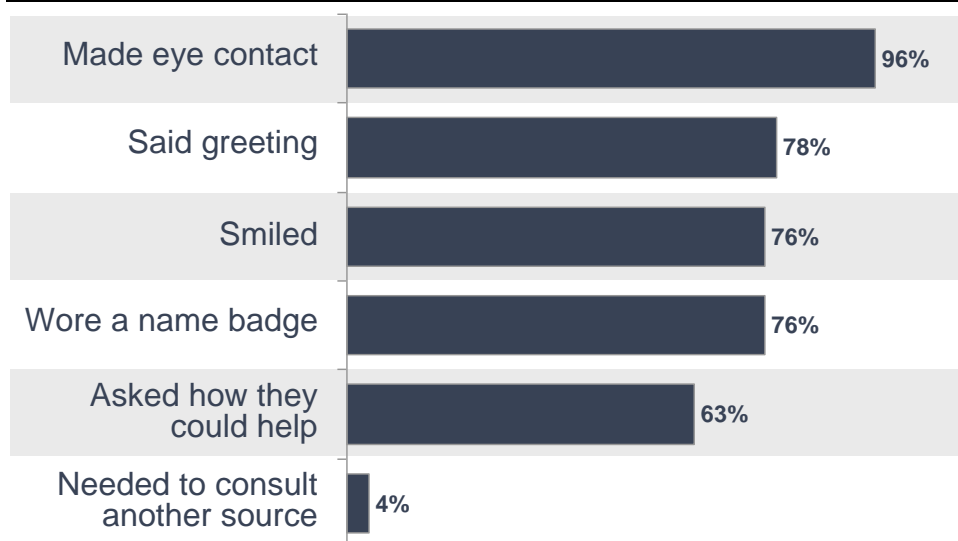


**Table 4.4 Manner of customer advisor**

Customer advisor was...	Total (%)
Polite	94
Spoke clearly	94
Generally helpful	92
Easy to understand	90
Calm/ not stressed	88
Listened carefully	89
Dealt with customer efficiently	85
Friendly	80
Probed for additional information	65

- On average, customer advisors spent 3 minutes and 40 seconds with the customer
- The performance of customer advisors was rated highly overall: 94% were seen as polite and speaking clearly, 92% as generally helpful and 90% as easy to understand

**Table 4.5 Whether the customer advisor...**



Base: 49

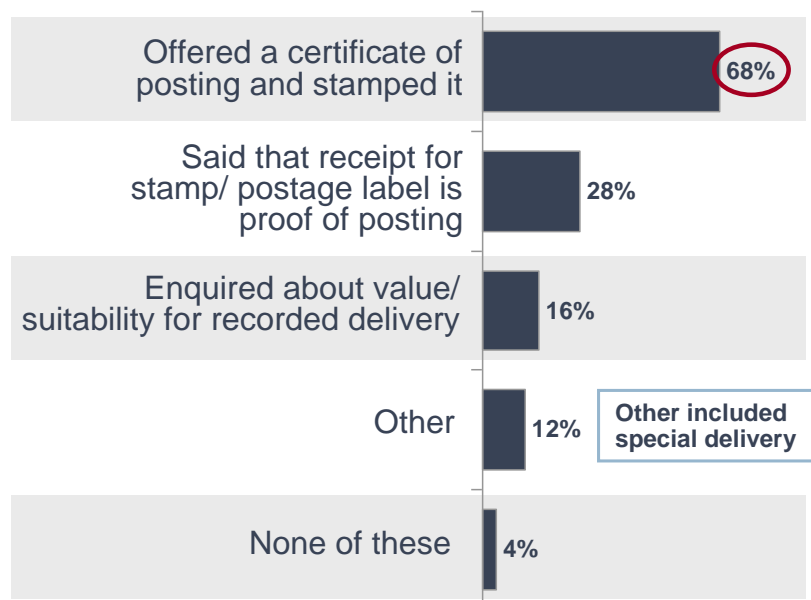
- A majority of customer advisors made eye contact (96%), gave a verbal greeting (78%), smiled (76%) and wore a name badge (76%)

*“The Customer Advisor gave me their full attention, always looking up at me and making eye contact, so that I knew they were listening.”*

#### 4.2.3 Scenario 1: Pricing in proportion and proof of postage

- All 50 customer advisors sold the correct value stamp but none of them provided additional advice or information regarding pricing in proportion

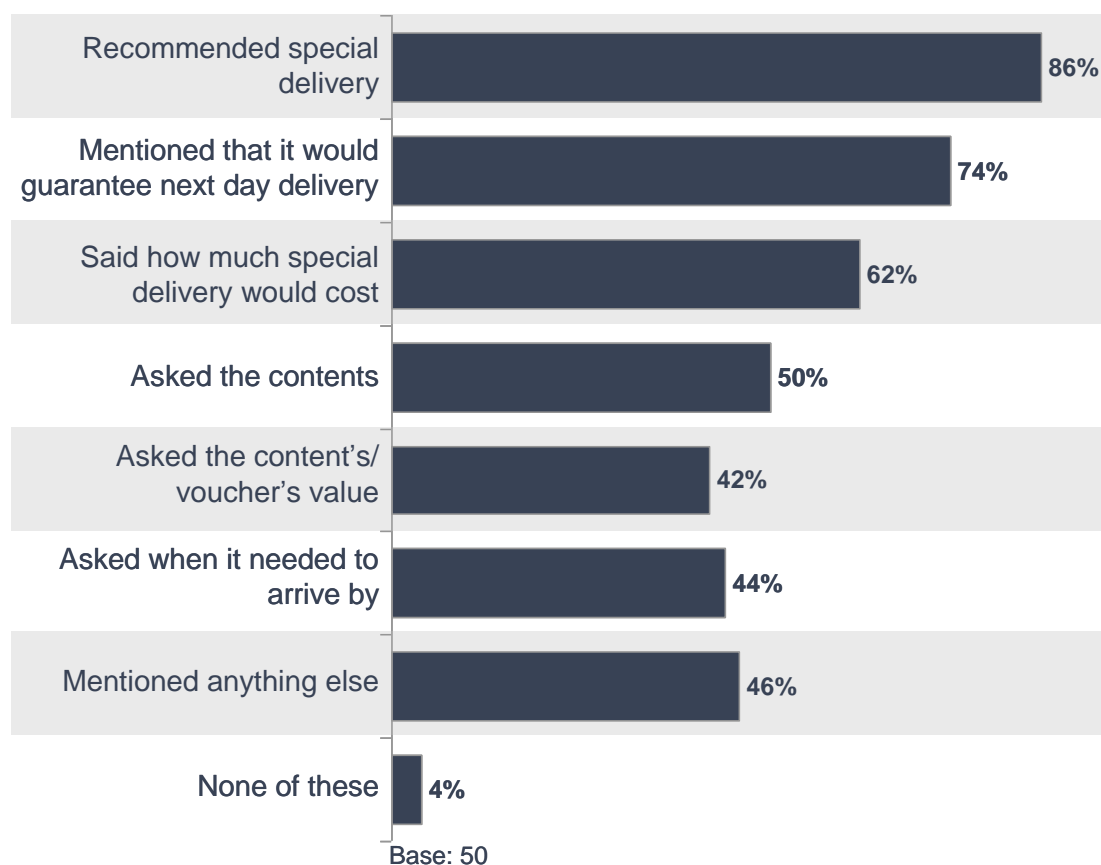
**Figure 4.6 Proof of posting**



- As for proof of posting, just over two thirds (68%) offered a stamped certificate of posting upon request – the rest offered other solutions

#### 4.2.4 Scenario 2: Special delivery

**Table 4.7 Special delivery**



- The majority of advisors (86%) recommended special delivery but only half of them asked for additional details that would enable them to make better recommendations
- 78% of advisors mentioned the special delivery packaging and half of them actually offered it

#### 4.2.5 Interior

- High proportion of branches rated as brightly lit (98%), clean (94%), tidy (88%) and well laid out (86%)
- 92% of branches were free of obstacles but over half had trip hazards (58%)

#### 4.2.6 Exterior

- 49 out of 50 branches (98%) had a lozenge post office sign outside
- 92% of branches displayed the post office opening times outside
- Parking was provided at 46% of branches, with disabled parking almost as available at 42% of branches
- 96% of branches were rated as 'clean', 94% were seen as 'well maintained' and 92% were considered 'welcoming'. The only branch considered to be neither of the above was in London

#### 4.2.7 Facilities for wheelchair users

- The vast majority of branches offered wide (94%) and flat (90%) entrances, 68% of branches also had automatic doors
- Under a third of branches offered conveniently positioned door handles (28%), lightweight doors (28%) and 'easy grip' door handles (24%)
- 16% of branches had a wheelchair lift at the entrance, while 14% provided a ramp and 8% had a separate entrance. 12% provided a low level door buzzer
- Provisions for disabled users varied somewhat between branches but were generally rather good, with 94% of branches offering spoken announcements, wide aisles (90%), displays showing a free counter (86%), accessible PiP templates (84%) and low level desks (82%)

#### 4.2.8 Conclusions

Overall, WHSmith franchises have got off to a good start.

- Despite having been converted from high-traffic Crown offices, queue lengths and waiting times were acceptable
- The quality of advice provided during our test scenarios was high
- The overall experience – including the manner in which customer advisors dealt with mystery shoppers, exterior and interior experience of the branch, and facilities for the disabled – was rated positively
- Accessibility for wheelchair users was very high and other facilities for disabled customers were widely available
- They were very good at providing information on opening times and available services

Future training and advice should focus on:

- Encouraging customer advisors to probe for additional information to ensure the correct product or service is offered
- Ensuring that training of advisors includes specific guidelines with regards to proof of posting and special delivery
- Encouraging further investment in facilities for disabled customers

## Appendix A Questionnaire

### Postwatch – Post Office Product Advice Survey 2008

RS Consulting A3679

Q1. The Post Office:

ID number of PO: .....

Name of PO: .....

Address: .....

.....

..... Postcode: .....

Q2. Day of week of visit:

1. Monday

2. Tuesday

3. Wednesday

4. Thursday

5. Friday

6. Saturday

### SECTION ONE: OUTSIDE THE POST OFFICE

Q3. Was there a 'lozenge' (oval shaped) post office sign outside?

PLEASE TICK ALL THAT APPLY

1a. Yes, flat on the front

1b. Yes, at right angles

2a. No, not flat on the front

2b. No, not at right angles

Q4. Were the post office opening times on display outside?

1. Yes

2.No

Q5. Which of the following services were noted or on display outside?

*Please tick yes or no for each*

	Yes	No
a) Postal services		
b) Home Insurance		
c) Car insurance		
d) Travel insurance		
e) Banking services		
f) Cash withdrawal		
g) Licenses and Applications		
h) Bill payments		
i) Personal loans		
j) Savings products		
k) None of these – no services advertised outside		

Q6. Overall, how would you describe the exterior of the Post Office? Would you say on this occasion it was?

*Please tick yes or no for each*

	Yes	No
a) Clean		
b) Well-maintained		
c) Welcoming		

Q7. Was there any car parking available nearby (*a distance of approximately 100 yards*) for use by Post Office customers?

1. Yes

2. No

Q8. Was there any disabled car parking available nearby for use by Post Office customers?

1. Yes

2. No

## SECTION TWO: WAITING TO BE SERVED

USE 24 HOUR CLOCK. NOTE HOURS AND MINUTES (e.g. 16:15)

Q9. Start time in queue:

:

Q10. Start time with Customer Advisor (PLEASE USE 24 HOUR CLOCK)

:

Q11. Time waiting in queue (Q10 minus Q9)

Minutes

Q12. Finish time with Customer Advisor (PLEASE USE 24 HOUR CLOCK)

:

Q13. Time spent with Customer Advisor (Q12 minus Q10)

Minutes

Q14. Did the Customer Advisor apologise for the wait in the queue?

1. Yes

2. No

3. No wait

Q15. How many customers were waiting in front of you when you joined the queue?

COUNT PEOPLE WHO ARE IN THE QUEUE IN FRONT OF YOU. DO NOT COUNT THOSE BEING SERVED.

COUNT GROUPS/ PAIRS (COUPLE OR MOTHER/ CHILD) AS ONE PERSON.

Q16. Did the queue extend to outside the post office at any point?

1. Yes

2. No

3. No queue

Q17. Did a member of staff act as a "queue host" asking those in the queue what services were required?

1. Yes

2. No

3. No queue

Q18. Did the queue block or impede customers' access to other services in the post office (e.g. bureau de change, groceries etc)?

1. Yes

2. No

3. No queue

Q19. How many windows are there in total at the Post Office?

ENTER TOTAL NUMBER WHETHER OPEN OR NOT.

INCLUDE ONLY THOSE DESIGNATED FOR POSTAL SERVICES.

Q20. How many counter positions (with active Customer Service Advisors) were open AND ACCEPTING CUSTOMERS when you arrived at the post office?

ONLY INCLUDE COUNTERS DESIGNATED FOR POSTAL SERVICES.

### SECTION THREE: AT THE COUNTER

Q21. Did the Customer Advisor say God Morning/ Good Afternoon/ Hello or similar?

1. Yes

2. No

Q22. Did the Customer Advisor ask how they could help? (e.g. 'How can I help you?')

1. Yes

2. No

Q23. Did the Customer Advisor look up at you/make "eye" contact?

1. Yes

2. No

Q24. Did the Customer Advisor smile when serving you?

1. Yes

2. No

Q25. Was the Customer Advisor wearing a name badge/have their name displayed (e.g. name badge or plinth)?

1. Yes

2. No

Q26. Did the Customer Advisor need to ask someone else or refer to other sources when providing information to you?

1. Yes

2. No

Q27. Were Customer Service leaflets available in front of the counter? (E.g. Red leaflet "We're here to help")

1. Yes

2. No

Q 28. Thinking about the Customer Advisor, did you find .....

*Please tick yes or no for each*

	Yes	No
a) It was easy to understand the information/advice you were given		
b) The Customer Advisor was friendly		
c) The Customer Advisor was generally helpful		
d) The Customer Advisor was polite		
e) The Customer Advisor listened carefully to me		
f) The Customer Advisor probed for additional information in order to recommend the most appropriate service/product		
g) The Customer Advisor dealt with you efficiently (i.e. not overly hurried or dawdling)		
h) The Customer Advisor spoke clearly		
i) The Customer Advisor was calm/showed no signs of stress		

**SECTION FOUR: PRODUCT ADVICE**

PRESENT FLAT A4 ENVELOPE CONTAINING JUST ONE SHEET OF A4

Q29a. I need to send this letter first class (will be to an address in England) How much will it cost?

DID THE CUSTOMER ADVISOR .....

*Please tick yes or no for each*

	Yes	No
1. Give the correct value/ price for the letter (52p) either by normal size or large letter stamp or print out label.		
2. Offer additional advice or information		
3. Other (please write in)		

Q29b. What would I require as a record to show I've posted it?

ONLY IF PROMPTED FOR THE VALUE OF ITEM/ SUITABILITY OF RECORDED DELIVERY PRODUCT, say **not valuable, don't want to pay extra for recorded delivery**

DID THE CUSTOMER ADVISOR.....

*Please tick yes or no for each*

	Yes	No
1. Offer a Certificate of Posting and stamp it		
2. Say receipt for stamp/ postage label is proof of posting		
3. Enquire about value/ suitability of recorded delivery		
4. Other (please write in)		

BUY STAMP RECOMMENDED AND POST IT. NOTE COST OF STAMP

PENCE

Q30. I have a card and present I need to send for my niece's [or cousin's] wedding. What would be the best way of sending it?

ONLY IF PROMPTED FOR TIME SENSITIVITY BY THE CUSTOMER ADVISOR, say it needs to arrive **tomorrow**.

ONLY IF PROMPTED FOR CONTENTS/ NATURE OF PRESENT, say it will be a **card and vouchers**.

ONLY IF PROMPTED FOR THE VALUE OF THE VOUCHERS, say **£40**

WHICH OF THE FOLLOWING DID THE CUSTOMER ADVISOR DO?

*Please tick yes or no for each*

	Yes	No
1) Asked when it needed to arrive by		
2) Asked what the contents would be		
3) Asked the content's value/how much the vouchers were worth		
4) Recommend Special Delivery		
5) Said how much Special Delivery would cost		
6) Mentioned that it would guarantee next day delivery		
7) Anything else (please write in)		

NOTE ANY OTHER QUESTIONS THE CUSTOMER ADVISOR ASKS, ANY OTHER SERVICES THEY RECOMMEND, ANY LEAFLETS THEY GIVE YOU

.....

.....

.....

IF SPECIAL DELIVERY RECOMMENDED BY CUSTOMER ADVISOR, ASK:

Q31a. Would any particular packaging be necessary to ensure it is secure?

*Please tick yes or no for each*

	Yes	No
1. Special Delivery packaging mentioned		
2. Special Delivery packaging offered (silver plastic envelope)		
3. Other Special Delivery packaging offered		
4. Anything else (please write in)		

Q31b If Special Delivery is not recommended what service is recommended?

*Please tick yes or no for each*

	Yes	No
1. Recorded delivery		
2. Ordinary first class post		
3. Other (please write in)		

## SECTION FIVE: FACILITIES FOR THE DISABLED

Q32. With regard to entrance access, in what way are wheelchair users catered for at this Post Office?

*Please tick yes or no for each*

	Yes	No
1) Separate entrance for wheelchair users		
2) Ramp at entrance		
3) Wheelchair lift at entrance		
4) Flat ("pavement to door") entrance		
5) Wide entrance		
6) Lightweight doors		
7) Automatic doors		
8) Conveniently positioned door handles		
9) "Easy grip" door handles		
10) Low level door buzzer		
11) Other (specify)		
12) None of these - wheelchair access would not be possible		

Q33. Which of the following facilities were there that catered for (disabled) customers?

*Please tick yes or no for each*

	Yes	No
1) Staffed low counter position		
2) Unstaffed low counter position		
3) Weighing scales provided at low level		
4) Low level post-box		
5) Low level/wheelchair accessible Writing desk		
6) Clearly marked hearing loops		
7) Spoken announcements (“Cashier number 2, please”)		
8) Display showing free counter		
9) Wide aisles and floor space for wheelchair users or pushchairs		
10) Easily accessible form dispenser		
11) Signs showing where disabled people can get additional assistance		
12) Chairs/seating available		
13) Accessible free standing PiP template (device to gauge size of envelope)		

Q34. Overall how would you describe the interior of the Post Office? Would you say on this occasion it was .....

*Please tick yes or no for each*

	Yes	No
a) Clean		
b) Tidy		
c) Well (brightly) lit		
d) Well laid out		
e) Lack of obstacles such as shelving, boxes etc so that a wheelchair can circulate freely		
f) No trip hazards to partially sighted or blind		

Q35. What other observations or comments do you have about this particular post office, the quality of its service and your experiences during the visit? (For example, appearance, staff, layout etc)

WRITE IN

.....  
.....  
.....

Q36. PLEASE TAKE PHOTOGRAPH OF POST OFFICE EXTERIOR

I confirm that this evaluation was carried out in accordance with the Market Research Society Code of Conduct on Mystery Shopping.

Evaluator signature: .....

THANK YOU, NOW PLEASE CHECK THE RESPONSES ON THIS FORM AND RETURN TO

..... IMMEDIATELY

OFFICE USE ONLY

Post Office Type:

1. Crown
2. Franchised/ privately owned
3. Franchised WHSmith

Area of Deprivation:

1. Yes
2. No

Post Office Location:

1. England – Greater London
2. England – South East
3. England – North
4. England – Midlands
5. England – East
6. England – South/West
7. Northern Ireland
8. Scotland
9. Wales

Urban/Rural:

1. Urban
2. Rural