



Consumer Focus  
Post

Campaigning for a fair deal

# Consumer friendly post offices?

Access, environment and service quality in  
Northern Ireland's Post Office network



# About Consumer Focus Post

Consumer Focus Post is the postal consumer champion in Northern Ireland. Through campaigning, advocacy and research, Consumer Focus Post works to ensure a fair deal for all postal consumers in Northern Ireland.

Consumer Focus Post is part of a non-departmental public body of the Department of Business, Innovation and Skills (BIS), created by the Consumer Estate Agents and Redress Act 2007.

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## **What are our goals?**

Consumer Focus Post has four strategic goals which form the basis of our campaigning to help reduce consumer detriment for all postal consumers in Northern Ireland.

**Access** – to ensure postal consumers in Northern Ireland have reasonable access to mail and post office services

**Service** – to engage with postal operators to improve the quality, reliability and efficiency of their postal services

**Value** – to ensure consumers receive a quality postal service which represents value for money

**Sustainability** – to work towards the sustainability of Northern Ireland's mail and post office services

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# Introduction

The Post Office is part of everyday life in communities across Northern Ireland. Yet, while a vital service for many consumers, the network has been experiencing a reduction in customer numbers in recent years. Loss of key Government services and a change in the way consumers use their post office have all contributed to this decline. Post Office Limited has responded by introducing more cost effective operating models such as Outreach Services and more recently Post Office (PO) Locals, as well as high-value products (financial, insurance, broadband etc) through their network to improve branch income. They have also undertaken a modernisation programme of their directly managed branches (Crown Offices), of which there are only eight out of a network of 480 branches in Northern Ireland. Despite some success, the network remains in a financially precarious position. However, the passage into law of the Postal Services Act this year and the United Kingdom Government's statement<sup>1</sup> on the future of the Post Office network in November 2010, herald major reform to help safeguard its future.

The Government asserts that to compete effectively in today's fast-changing retail environment, the Post Office network needs to change and its renewal must be driven by what consumers really want – greater convenience through longer opening hours, quicker service and high retail standards in well positioned, accessible locations<sup>2</sup>. As the statutory watchdog, it is our role to monitor the quality and accessibility of the Post Office network in Northern Ireland. We have a particular responsibility to protect the interests of those consumers who are vulnerable, including those with disabilities.

Our Annual Postal Consumer Satisfaction Survey in 2010<sup>3</sup> illustrates the importance of the Post Office network to many consumers, especially those who are disabled. Findings from this research show that four in 10 Northern Ireland consumers visit the post office once a week, with this level increasing to six in 10 for consumers who are disabled.

Despite the affinity for the Post Office network shown in our previous research, many consumers feel their local post office service can be improved. Consumers have told us that their local post offices should be situated in a more convenient location, have reduced queuing times, better accessibility, longer opening hours and more professional and informative staff, with an increased range of services and more suitable premises.

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<sup>1</sup> BIS - Securing the Post Office Network in the digital age (November 2010)

<sup>2</sup> Ibid

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<sup>3</sup> Perceptive Insights Market Research – Annual Survey of NI Mail and post office services 2010

## The purpose of this study

This report examines how Post Office Limited is currently meeting the needs of Northern Ireland consumers through its branch network provision and outlines what improvements are required to meet the needs of all their consumers, especially those who are disabled.

There were a number of reasons why we felt this study was timely and appropriate:

**Statutory role** – Consumer Focus Post has a specific statutory duty to monitor the number and location of post offices, with a particular regard to consumers who are most vulnerable. We defend and promote the consumer interest in relation to the Post Office network and lobby Post Office Limited to implement changes to benefit consumers. Our unique perspective is informed by studies such as this, where we develop a greater understanding of what the consumer needs from their local post office.

**PO Locals** – Over the next few years the Post Office network faces significant restructuring as one in six post offices (a total of 2,000 throughout the United Kingdom), will be converted into a new operating model called 'PO Local'. This will mean that many existing post offices in Northern Ireland could change with many services transferring into nearby shops, petrol stations or other existing retail facilities. PO locals represent a fundamental shift in how post office services are provided, with a slightly reduced range of products and services but often longer opening hours. With this roll out, our research findings are vital in ensuring that consumers needs remain at the forefront during the future development of this model and that it remains appropriate to the needs of all Northern Ireland consumers, particularly disabled consumers who rely on it most.

**Postwatch NI study** – Our predecessor, Postwatch Northern Ireland, undertook a mystery shopping exercise in 2004 to establish the accessibility of Northern Ireland's post office network, in particular for consumers who are wheelchair users or have limited mobility. The research produced some alarming findings with 32 per cent of post offices classified as poor or very poor in terms of overall ease of access. Therefore, we felt it was important to revisit this survey to measure the changes in accessibility and to assess how Post Office Limited has developed its branch network to accommodate consumers with disabilities.

# Objectives

The objectives of the research can be summarised as follows:

- With a method consistent with Postwatch's 2004 survey, examine the changes in the accessibility of post office branches across Northern Ireland for consumers with disabilities
- Evaluate the consumer experience of a typical post office visit, by assessing queuing times, staff knowledge/advice and customer service provided
- Evaluate the post office environment in terms of signage, presentation and layout of premises
- Suggest strategies and actions to improve the accessibility, service and environment of Northern Ireland's branch office network



# Background

Post Office Limited is the largest retail chain in the United Kingdom, with the broadest reach of any retail branch network in Northern Ireland, through its approximately 480 post office outlets. There are numerous different types of outlets within the network including, Crown Office branches located in city and larger town centres, outlets run by subpostmasters that combine a shop with the post office branch, as well as outreach services including mobile post offices, and services that visit community halls or local shops. Post offices have repeatedly been described as a vital public service and a cornerstone of local economies by consumers, politicians and stakeholders. They play a uniquely important role in the lives of many consumers across Northern Ireland, and in particular our research has shown that those consumers who are disabled or elderly are disproportionately more reliant on this vital service. Therefore we feel it is important that the experience of disabled consumers using the network is fully explored to ensure this group of consumers is provided with equality of access and service at their local post office branches.

## What's happening within the Post Office network?

The recent Royal Assent to the Postal Service Act 2011 heralds a new era for Post Office Limited. As well as the separation of Post Office Limited from the Royal Mail Group, the Act makes provision for the Post Office network to be converted into a mutual structure at some point in the future, with a possible transfer of its ownership and management to employees, subpostmaster and communities. The Government policy statement *Securing the Post Office network in a digital age*, published in November 2010, confirms a funding commitment of £1.34 billion over the next four years to maintain and modernise the network of 11,500 post offices across the United Kingdom, with no further programme of closures. However, in order to maintain this network size, approximately one in six post offices will be converted to the more cost-effective PO Local model. Post Office Limited is currently in the process of developing and piloting this model, with 83 pilots opened to date – four of which are located in Northern Ireland<sup>4</sup>. At the end of 2010, Consumer Focus, our parent organisation, published a report ('Local but Limited'<sup>5</sup>) which studied pilot PO Locals across the United Kingdom, including Northern Ireland. This report revealed the benefits and problems consumers experience with these pilot branches. Lack of privacy, temporary breaks in service, capped benefit withdrawals and insufficient staff training, in many cases outweighed the benefits of longer opening hours and convenience. Consumer Focus and Consumer Focus Post will be working with Post Office Limited in the development of the PO Local model, and the findings from this study will provide a key contribution to this work.

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<sup>4</sup> Correct at the time of going to print (September 2011)

<sup>5</sup> <http://bit.ly/pNhsAe> (PDF)

## Improvements to the Post Office network

Post Office Limited has been carrying out a £40 million Crown Office Modernisation Programme on the 370 Crown Offices across the United Kingdom, including all eight branches in Northern Ireland. This programme has helped to develop and introduce new ways to serve consumers and reduce queuing times (self-service kiosks, specialist sales areas), along with improved staff training. These improvements reflect Post Office Limited's commitment to their flagship Branch Offices and their drive to create centres of sales and service excellence.

Throughout the remainder of their network Post Office Limited has made some progress in improving access for disabled consumers. Since 2004, matched funding has been available, and continues to be available, to Subpostmasters up to the value of £1,500 per post office, to help finance adjustments to properties to improve accessibility and comply with Disability Discrimination legislation. To date, 74 applications have been made to this fund from Northern Ireland post offices, with only two applications since 2010.

Also, as part of one-off programme undertaken by Post Office Limited in 2009 to help improve accessibility throughout their branch network, a range of actions were undertaken.

These included:

- Working with Direct Enquiries, the nationwide disabled access register, telephone audits were undertaken at post office branches throughout the United Kingdom. Accessibility information obtained through this survey is displayed on both Post Office Limited's<sup>6</sup> and Direct Enquiries<sup>7</sup> websites
- Following up on the Direct Enquiry telephone survey, Post Office Limited tasked a team of 53 Disability Programme Advisers to visit 9,000 branches throughout the UK, to speak to Sub-Postmasters about the disability access of their branch
- *Accessibility and the Post Office* self audit packs, which contain guidance on Disability Discrimination Act (DDA) legislation and improvements that can be made to improve access, were sent to all Sub-Postmasters. This pack is still supplied to all new agents today

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<sup>6</sup> <http://bit.ly/nOenEE>

<sup>7</sup> <http://bit.ly/qixGwx>

## Previous research studies

The incidence of disability is higher in Northern Ireland than in the rest of the United Kingdom, with one in five adults having a disability and one in four having multiple disabilities<sup>8</sup>. In 2004 our predecessor, Postwatch Northern Ireland, undertook research to measure the accessibility of Northern Ireland's post office network. The findings of this research were alarming with 32 per cent of post offices classified as poor or very poor in terms of overall ease of access. Furthermore, in one in five post offices the aisles were classified as too narrow for wheelchair users and only 20 per cent of urban post offices provided allocated parking spaces for disabled consumers. Influenced by this research, Post Office Limited launched a campaign to improve accessibility across the United Kingdom post office network. Leaflets on 'providing guidance on how to apply for disabled car parking', and 'Access for disabled consumers', were issued by Post Office Limited to every subpostmaster in the United Kingdom.

More recently, UK-wide research undertaken by Consumer Focus in December 2009 – *Evaluating the Quality of Service and Product Advice at Crown Offices and Privately Managed Offices*<sup>9</sup>, showed that Northern Ireland post offices were still showing signs of poor accessibility for disabled consumers, when compared with other regions of the United Kingdom. The research revealed that Northern Ireland's busiest post offices had a lower level of interior and exterior signage than any other part of the United Kingdom, and had the highest level of trip hazards and obstacles within branch premises.

Each year since our creation in 2008 Consumer Focus Post has commissioned an Annual Survey of 1,000 people, representative of all demographic groups within Northern Ireland's population, to help inform our understanding of what mail and post office issues face the consumer in Northern Ireland, and to develop our understanding of what consumers need from their postal service. The results show that consumer priorities always remain the same – reduced queuing time, longer opening hours, increased privacy, better layout of premises, more convenient location, more professional and informative staff and better accessibility. Some comments on improvements sought to local post office branches include:

*'All services at one counter to avoid queuing up for a second time'*

*'It needs to be more efficient in terms of the number of transactions'*

*'More professional informative staff'*

*'More staff on the counters'*

*'My local post office is too small and cramped'*

*'Better advertising of services available'*

*'Longer [opening] hours'<sup>10</sup>*

<sup>8</sup> <http://bit.ly/pFX2Do> (PDF)

<sup>9</sup> <http://bit.ly/rnmLf0> (PDF)

<sup>10</sup> Ipsos MORI Ireland – Annual survey of Northern Ireland's mail and post offices 2011

# Methodology

For the purposes of this study, we commissioned Millward Brown Ulster to undertake a mystery shopping exercise to replicate the consumer experience while visiting post office branches and to assess the quality of service they receive. The survey was designed to capture evidence of Post Office Limited branch network service, environment and accessibility<sup>11</sup>.

A stratified random sample<sup>12</sup> was drawn to include over one fifth of the 480 post office branches in Northern Ireland. Mystery shops were conducted at 100 post offices:

- **Eight Crown Post Offices**

Crown Office – a post office that is owned and directly managed by Post Office Limited

- **16 Franchise Post Offices**

Franchise Post Office – a post office managed on an agency basis by franchise partners. The franchise partner is responsible for the day-to-day management of their specific post office branch. Some franchise partners within Northern Ireland include supermarkets such as Supervalu

- **One Main Post Office**

Main Post Office – a relatively new post office operating model, typically a large post office branch located in a busy retail outlet. This post office offers both the traditional counter area and has the additional benefit of a limited range of services being available at the retail counter outside of the regular post office opening hours

- **Four PO Locals**

Post Office Local – is also a relatively new operating model that is currently being piloted across the UK. Instead of a dedicated Post Office counter, Post Office Locals provides a core range of services at existing retail counters in shops such as convenience stores, petrol stations, newsagents and supermarkets, with longer opening hours

- **71 Scale payment sub office (SPSOs)**

SPSO – Scale Payment post offices (or subpost offices) make up the majority of the network. They are independent businesses run by Subpostmaster. They can be self standing post offices in their own right; the local village shop or housed inside another, larger shop.

For the purposes of this study, we decided to exclude outreach services as many of these operate from non-standard and sometimes improvised locations

The visits took place at a variety of times to sample the experience at varying levels of custom. Two visits per post office were conducted at different times of day to try to be reasonably representative of each particular establishment. The fieldwork was conducted in March 2011 by fully trained experienced assessors.

This method was designed to replicate the survey carried out by our predecessor body Postwatch Northern Ireland in 2004, so genuine comparisons could be made from the findings.

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<sup>11</sup> It is important to note that this study was not designed to qualify as an accessibility audit for the purposes of compliance with disability discrimination legislation; but rather an overarching survey which provides generic findings which will advise Post Office Limited how they can better serve their disabled and vulnerable consumers

<sup>12</sup> Stratified random sample – the total sample population is split into groups and cases are the selected within those groups

The sample was made up as follows:

County/Area	Total number of visits	Number of rural post office visits	Number of urban post office visits
Belfast	22	0	22
County Antrim	32	20	12
County Armagh	20	16	4
County Down	44	30	14
County Fermanagh	16	14	2
County Derry/Londonderry	32	24	8
County Tyrone	34	26	8
<b>TOTAL</b>	<b>200<sup>13</sup></b>	<b>130</b>	<b>70</b>



<sup>13</sup> One hundred post offices visited twice

# Findings

Post Office Limited's key strengths are its trusted brand and the unparalleled reach of its branch network. But it is vital for Post Office Limited to invest in their branch network to develop a sound platform for launching new products and services and to provide an improved consumer experience for all consumers, especially those who are most reliant upon its services. To achieve this, we feel it is essential for Post Office Limited to consider three main aspects of their network: **accessibility, environment and service.**

These issues are discussed in the following sections.

## Accessibility

Elderly or disabled consumers, and those on lower income, are disproportionately reliant on post office services, as the table below illustrates.

20 per cent of disabled consumers are more likely to use the post office at least once a week, than non-disabled consumers – and this underlines the importance of developing a branch network which meets the needs of the consumers it serves, especially those who are most reliant upon it.

We recognise that disabled consumers rights are mainly protected under disability legislation<sup>15</sup>, whereby it is unlawful for those providing goods, facilities and services to the public to discriminate against disabled people. However, we would encourage Post Office Limited to maximise the opportunity to serve their consumers with disabilities by providing the highest standards of access provision.

To assist Post Office Limited with improving the standard of their branch network accessibility, our study traces the journey of post office consumers, assessing both the external and internal accessibility and facilities for disabled consumers. These findings are compared below, with our predecessor organisation study undertaken in 2004.

Frequency of Post Office use<sup>14</sup>

	Age					Disability		Socio-Economic Groupings	
	16-24 (133)	25-34 (197)	35 -49 (269)	50-64 (214)	65 + (186)	No (839)	Yes (163)	ABC1 (462)	C2DE (540)
(Base 1,002:all respondents)									
Use the post office at least once per week	20%	32%	49%	49%	<b>69%</b>	<b>42%</b>	<b>63%</b>	41%	<b>50%</b>

<sup>14</sup> Perceptive Insights Market Research – Annual Mail of NI Mail and Post Office Services 2010

<sup>15</sup> Disability Discrimination Act 1995 and Disability Discrimination (Northern Ireland) Order 2006

## Outside the Post Office

The important first impression for consumers is established outside the post office premises. Consumers, especially those with disabilities, often travel by car to the post office. The availability of parking, especially disabled parking in close proximity to the premises, is an important concern for these consumers.

## Parking spaces

Our survey found the following results:

- Almost nine in 10 (85 per cent) post offices had **parking spaces available** (both dedicated private and public on-street) in close proximity<sup>16</sup> to the premises. This has increased from 76 per cent in 2004
- The proportion of allocated **disabled car parking** spaces at post office locations has tripled from 13 per cent in 2004 to 44 per cent in 2011. The larger Crown Offices (73 per cent) and Franchise Post Offices (72 per cent) are almost twice as likely to have allocated disabled parking spaces, as the smaller post offices branches (38 per cent)

It is pleasing to note that Post Office Limited has implemented the recommendations from the previous survey undertaken by Postwatch Northern Ireland. Car parking spaces generally have increased significantly with the level of allocated disabled parking more than trebling. However, there is still more work that can be done, with six in 10 smaller post offices failing to provide allocated parking for disabled consumers.

<sup>16</sup> Less than 50 meters from premises



## Approaching the Post Office

The next important issue for many disabled consumers once they have parked or if they have arrived by public transport or on foot, is that the exterior surfaces and gradients should not hamper their movement or access to the post office.

- The number of branches with **level access**<sup>17</sup> from the road/disabled parking bay to the pavement remains the same as in our previous survey, with only three in five post offices having level access
- There has been a slight increase in the number of **drop kerbs** outside post office premises since 2004. Our survey found that the number of locations with drop kerbs had increased from 50 per cent in 2004 to 59 per cent in 2011. Interestingly, only four in 10 post offices had drop kerbs in County Fermanagh and County Antrim, compared to seven in 10 in County Derry/Londonderry and County Armagh
- Nine in 10 branches visited had **surrounding pavements** which were perceived to be in good order. Some exceptions included examples of pavements being uneven, too narrow, or roughly paved or with loose gravel. Almost all (99 per cent) of the urban branches had pavements in good order compared to just over nine in 10 rural branches. In Belfast, 100 per cent of our sample had good surrounding pavements

- The survey team found **obstacles to access or movement** approaching the post office premises at almost one sixth of branches (16 per cent); this was similar to the finding in 2004. Significant obstacles included signs or advertising boards, bollards, merchandise such as plants or shrubs near the entrance, boxes, litter bins and shopping trolleys or baskets. Obstacles were more likely to be present around rural branches (22 per cent) than urban (6 per cent)

It is disappointing that little improvement has been made since 2004 in providing level access and drop kerbs to assist those consumers who are partially sighted, wheelchair users or those with limited mobility. It is imperative that Post Office Limited and their subpostmasters or agents should work closely with relevant authorities such as the Planning Service NI or Roads Services NI (depending on the location of their premises – ie whether in a residential or retail area), to improve access to their branches and reduce the difficulties faced by consumers with disabilities.

Subpostmasters and agents must be vigilant and ensure that unnecessary obstacles are removed from outside their premises. While we appreciate that many may be there to encourage sales, we would ask that subpostmasters and agents are mindful of those consumers who are disabled, and the difficulties they may face when accessing their premises.

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<sup>17</sup> This was defined by the survey team as surface which is level without any kerbs, steps or significant rise or falls

## Entering the Post Office

For the consumer who is disabled, visiting a post office for the first time can be an anxious experience if they are unaware of the facilities provided for them. While Post Office Limited provide a useful online service via their website called 'Post Office Branch Access Guide'<sup>18</sup>, Consumer Focus Post believes that disabled access symbols should be displayed at the point of entry, to inform consumers of the facilities which are available to them inside the premises.

## Disabled access symbols

- Just under a third of post offices (29 per cent) had **disabled access symbols** displayed at the entrance indicating the facilities provided for disabled consumers. Post offices in urban areas (40 per cent) were more likely to display access symbols than their counterparts in rural areas (20 per cent), as were Crown Offices compared to the other post office types. Disappointingly, none of the four new style pilot PO locals display any access symbols at all
- Of those post offices which displayed access symbols, the most common signs were:
  - Non-assisted wheelchair access (86 per cent)
  - Induction/Hearing Loop (74 per cent)
  - Assisted wheelchair access (28 per cent)
  - Assistance Dogs welcome (16 per cent)

## Entrance to premises

- Over two thirds (70 per cent) of post offices were rated as good for ease of **overall access**, with around a third (31 per cent) rated as 'very good', an increase of 25 per cent since 2004. This is a significant improvement, in particular when we consider that only 8 per cent were classified as poor or very poor, compared to a third (32 per cent) of post offices rated as poor or very poor in 2004
- Although a marked improvement, almost a fifth of post offices (16 per cent) still had **a step or steps** leading up to the entrance compared to 38 per cent in 2004. This was more common in rural areas (21 per cent) than urban (6 per cent). One in 10 post offices provides a hand rail outside the premises for those consumers with limited mobility. Of those visited, only 2 out of 16 post offices with entrance steps also had a fixed or permanent ramp making the property wheelchair accessible. This means 14 per cent of post offices surveyed may be problematic for consumers who are wheelchair users
- Due to the 'mystery shopping' nature of the survey we were unable to ascertain whether the post offices with steps offered a temporary ramp which could be made available on demand. However, one in five post offices (19 per cent), which had external steps at the entrance, had a working buzzer or doorbell which could be used to request assistance if required. There was a slightly higher level of permanent **ramps** observed (12 per cent) compared to our survey in 2004 (9 per cent)

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<sup>18</sup> <http://bit.ly/nOenEE>

- 93 per cent post offices were regarded as having **doors** wide enough for a wheelchair<sup>19</sup>, an increase of 8 per cent since 2004. Indeed we have witnessed a significant increase in automatic doors with 41 per cent post offices having this feature compared to 19 per cent in 2004. Almost 59 per cent of post offices had manual doors, which can prove problematic for some consumers

Post Office Limited and its subpostmasters and agents must be congratulated on the significant improvement in access to the Post Office network overall. However, many improvements can still be made to improve access and reduce obstacles for those consumers who are disabled. We would recommend that Post Office Limited, their subpostmasters and agents display disabled access symbols at the entrance to their properties consistently across the network. This would reduce embarrassment for many disabled consumers and encourage more consumers to use the facilities available to them.

It is important that Post Office Limited and their subpostmasters and agents undertake practical and effective adjustments to their properties, to reduce the difficulties faced by disabled consumers. While we welcome the reduction in entrance steps to post office premises, we remain concerned that entry to 14 per cent of post offices in Northern Ireland remains problematic for consumers who use a wheelchair. If consumers are not informed of the reasonable adjustments made by some post offices they are unlikely to use them. Therefore, we would urge Post Office Limited, their subpostmasters and agents, where appropriate, to display signage informing customers of the availability of a temporary ramp facility.

<sup>19</sup> A width of approximately 80cm

## Inside the Post Office

As the layout and style of each post office is unique, it is important that Post Office Limited and their subpostmasters or agents ensure that the service they provide is consistently accessible to all consumers regardless of their disability. Once inside the post office, consumers with disabilities may encounter further obstacles. Our survey found that,

- Almost all (96 per cent) post offices were considered to have a **floor covering**<sup>20</sup> that was suitable for consumers with limited mobility or wheelchair users
- For many post offices, especially those which are located within larger shops or outlets it is important for **clear directional signage** to be provided. This can avoid consumers, especially those who are disabled, making unnecessary and often difficult journeys around large retail stores. Two in five (43 per cent) did not have any directional signage where it was considered necessary by the survey team
- At just over one in 10 (12 per cent) branches surveyed, it was considered that the **aisles** were not wide enough for wheelchair users – a slight improvement from 19 per cent in 2004. 13 per cent of post offices were found to have items or trip hazards blocking aisles or creating obstacles on the route to the counter – a marked reduction from 25 per cent in 2004
- The **lighting** within post offices has improved since 2004, with nearly nine in 10 (88 per cent) of post offices perceived to have 'good' or 'very good' lighting, compared to only six in 10 (60 per cent) previously

<sup>20</sup> Appropriate floor covering includes any hard material, such as tile, vinyl, wood, some industrial carpet, which are non-slip and in good order

- Although not captured in the 2004 survey, we felt it was important to assess the level of **facilities available for consumers with disabilities**. The table overleaf clearly shows the inconsistent approach to providing facilities for disabled consumers across the Northern Ireland network. The most commonly available assistance for those with physical disabilities is the 'Accessible form or leaflet dispenser', with almost three quarters (72 per cent) of post offices having this facility. Crown Office branches score highly in almost all of the categories, although some improvements are needed in provision of assistance signage, low level weighing scales and post boxes. Although we recognise the PO Locals visited are newly established, they demonstrate a particular lack of facilities for those consumers who are disabled

It is pleasing to see a marked improvement in many aspects of the interior of post offices since the earlier survey by Postwatch NI. However, the network still provides obstacles and difficulties for many consumers using the post office service. Over one in 10 post offices still have unnecessary trip hazards and obstacles within their aisles. As this should be easily resolved with relatively little effort or cost, Post Office Limited and their subpostmasters or agents should strive harder to ensure obstacles in aisles are kept to a minimum.

Facilities	Total	Urban	Rural	Crown Office	Franchise Post Office	PO Local	SPSO
Easily accessible form/leaflet dispenser	72%	91%	61%	100%	88%	25%	68%
Chip & pin keypad mounted at a low level for wheelchair users	42%	77%	23%	100%	82%	25%	27%
Clearly marked hearing loops	40%	50%	34%	63%	47%	0	37%
Low level/wheelchair accessible writing desk	35%	66%	18%	88%	68%	0	23%
Staffed low level counter position	29%	59%	12%	81%	59%	25%	16%
Signs showing where consumers with disabilities can get additional assistance	26%	30%	23%	19%	38%	0	25%
Weighing scales provided at low level	19%	39%	8%	50%	41%	25%	10%
Low level post box	17%	36%	7%	44%	38%	0	10%
Chairs/seating available	17%	29%	11%	75%	18%	0	11%

Many improvements are still necessary across the network, in particular within the SPSOs and, worryingly, the new PO Local pilots. While we welcome Post Office Limited's recent investment in their Crown Office network, we believe this only serves to highlight the lack of investment in the rest of the network in Northern Ireland. With the major changes proposed for the Post Office network in the forthcoming years, it is imperative that a consistent approach to improving disabled access is adopted across the entire network. We recognise the previous activity of Post Office Limited in improving the accessibility of their network in 2009; however it is important this approach is maintained.

Post Office Limited must lead the way in undertaking *regular* disability audits of their entire branch office network, and provide bespoke guidance and resources to subpostmasters and agents to help improve the accessibility of their services.

## Environment

Post Office Limited recognises that the modernisation of their Crown Office network provides a platform to improve their service in the future. However, future plans must involve their entire branch office network. While we welcome the investment Post Office Limited has made in their Crown Office network, Northern Ireland has only eight Crown Offices, less than 2 per cent of the province's network and the lowest proportion of any region in the United Kingdom.

Therefore, by default Northern Ireland consumers have benefited least from this Modernisation Programme. Indeed, many other vital post offices in rural and urban deprived areas have not received any significant investment and are struggling to survive and position themselves as credible providers of Post Office Limited's more profitable services such as Broadband, insurance or financial products. Post Office Limited wishes to develop these services, however, our research shows that currently less than 10 per cent of customer sessions in Post Office branches throughout Northern Ireland can be attributed to these new, profitable products<sup>21</sup>.

The Post Office network in Northern Ireland is heavily reliant on the central Government subsidy for survival. However, the Government has indicated that they expect this subsidy to reduce considerably in the future. To assist the post offices in increasing the profitability of their businesses, Consumer Focus Post, the National Federation of Subpostmasters and Post Office Limited have jointly and continuously lobbied the Northern Ireland Executive to introduce a Development Fund for Northern Ireland post offices.

This would be similar to the fund which already exists in Scotland and Wales. Each post office in Scotland and Wales can bid for up to £25,000 and £35,000 respectively, for funding to refurbish and diversify their business, to create extra revenue and help sustain the Post Office network within the local community. Disappointingly, we have been unsuccessful in our attempts to date.

Our research on the service environment has concentrated on the overall appearance of post office branches – both the exterior and the interior.

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<sup>21</sup> Ipsos MORI – Annual mail and Post Office survey 2011

## Post Office exterior – appearance and signage

We asked the survey team to rate the overall appearance of the exterior of the property by evaluating it against a predetermined set of measures, including, clear signage, clean windows, obvious signs of disrepair and exterior/window poster display.

Our survey found that:

- While a quarter (25 per cent) of post office exteriors was rated as 'very good', a third (33 per cent) of all post offices surveyed was given a rating of 'neither good nor poor' or 'poor/very poor'
- Crown Offices (94 per cent) and Franchise Post Offices (85 per cent) appearance were perceived as 'very good or good', in comparison to 63 per cent of SPSOs
- While, many post offices scored highly across all appearance categories, evidence of disrepair was observed in a sixth (15 per cent) of post offices
- The survey revealed a fairly inconsistent approach to signage across all post offices. The most common form of exterior signage was the projecting Post Office lozenge, witnessed in two thirds (66 per cent) of post offices, followed by fascia signage, found in almost half (49 per cent), and window or door signage in less than a third (32 per cent). Other types of signage were used such as street signage. For example A-Boards were quite common at Franchise Post Offices (15 per cent) and PO Locals (13 per cent)
- While nine in 10 (90 per cent) of urban post offices had their signage rated as reasonably to exceptionally clear, only three quarters (77 per cent) of rural post offices achieved this rating

## Post Office Interior – appearance and layout

Each post office varies in type, size, layout and appearance. Many post offices, particularly the larger Crown Offices, are standalone businesses with no supporting retail offer. The majority, however, are positioned within a larger retail business or convenience store. Post Office services are frequently provided from a separate and dedicated post office counter located within the premises. However, more recently, post office services such as those in PO Locals are being dispensed by staff at the retail point of sale location. Given these variations, we asked our survey team to rate the appearance and layout of the interior of the entire premises within which the post office services are located in terms of cleanliness and tidiness, signs of disrepair, clutter, and ease and convenience of layout.

Our survey found that:

- Overall, just over half (55 per cent) of post office interiors were rated as very good or good. However, 15 per cent of interiors were rated very poor or poor
- The interiors of urban post offices were rated much more positively than those of rural post offices. Two in five (40 per cent) of urban post office interiors were judged as 'very good' compared to less than one in 10 (8 per cent) of rural post offices. Indeed only a quarter (22 per cent) of rural post offices were rated as 'poor', compared to only 3 per cent of urban post offices
- 15 per cent of post offices were found to have obvious signs of disrepair. This was more prevalent in rural post offices (19 per cent) compared to urban (5 per cent)

- Almost three in 10 (29 per cent) post offices were found to be cluttered. Again, rural post offices (37 per cent) performed significantly worse than their urban counterparts (13 per cent)
- One third (33 per cent) of post offices were rated as having a poorly located counter position for sensitive transactions. Post Offices which are independently operated, ie both Franchise Post Offices (21 per cent) and SPSOs performed the poorest in this respect. Comments noted by the survey team to support this finding include – 'only one window, very small outlet and no private facilities where sensitive business could be conducted' and 'all too open, no real privacy between cashier counters'

While we acknowledge that Post Office Limited is looking into improving their signage as part of their future network strategy, we believe the lack of consistent signage and the unwelcoming appearance of the interior of half of their branch network in Northern Ireland, especially in rural areas, needs urgent attention. However, we recognise that in a number of branches, in particular the smaller rural post offices, a lack of space and available finance for reinvestment may account for some of the issues we have uncovered. Consumer Focus Post believes these findings illustrate the urgent need for financial support and investment across the Post Office network from the Northern Ireland Executive, in the form of a Post Office Diversification Fund.

## Service

Many consumers enjoy the benefits of having a local post office but they are often frustrated by the service provided when they come to use it. As more electronic or banking alternatives become available, if they don't have to use it, they simply won't, losing vital revenue for the post office network. Recurrent themes when we talk to consumers are 'the queue is always out the door'<sup>22</sup>, 'more professional informative staff [needed]' and 'longer [opening] hours'<sup>23</sup>. In order for the post office to prosper, or indeed survive, it is important that Post Office Limited listens to their consumers, and tailors their branch network to meet their needs.

Our research on service concentrated on a number of areas which typify the concerns of Northern Ireland postal consumers, namely, **queuing, customer interaction and staff knowledge and advice provided.**

## Queuing

Queuing has been a problem for many years for Post Office consumers. As lives are increasingly busy, many are prepared to spend less time in queues, and will seek alternative ways to undertake their transactions. It is therefore an issue Post Office Limited must address urgently before further erosion of customer numbers.

The table overleaf provides information on the length of time consumers can typically expect to spend in a queue and at the counter within the various types of post offices across Northern Ireland's branch network.

<sup>22</sup> <http://bit.ly/rnmLf0>

<sup>23</sup> Ipsos MORI Ireland – Annual survey of Northern Ireland's mail and post offices 2011

- As expected, our research has found that urban post offices are generally busier than rural; however, the length of each customer session in rural areas (2 mins) is more than double that of its urban (0.8 mins) counterparts
- Consumers using Crown Office services (5.8 mins) can expect to wait over twice as long as the average post office consumer in Northern Ireland (2.1 mins). The longest queues (9.6 people) were witnessed at Post Office Limited's Crown Offices, despite having the shortest customer session duration (0.6 mins). This problem is further exacerbated by the lack of open counter positions, as only just over half (55 per cent) of all positions were found during the survey to be open
- While Franchise Post Offices also share an unacceptably low level of open counter positions (53 per cent), the average length of time consumers spend in the queue at a Franchise Post Office (3.8 mins) is significantly less than Crown Offices (5.8 mins)
- The most common type of post office (SPSO) has one of the highest levels of open counter positions (66 per cent). As we would expect consumers using these post offices can spend up to twice as long at the counter (1.8 mins) when compared to Franchise Post Offices (0.9 mins) and three times longer than Crown Offices (0.6 mins), as typically these post offices are located in smaller communities where customers are well known to staff
- We would expect to observe the high level of open counter positions at the PO Locals (88 per cent), as this post office service is typically operated through a shared service point within the retail outlet. In line with the previous research undertaken by Consumer Focus on PO Locals, much of our concern centres on the level of training provided to staff at these outlets. An average transaction time of 2.5 mins for PO locals, confirms this issue. This transaction time is over four times longer than that of Crown Offices and over twice as long as those undertaken in Franchise Post Offices
- Consumer Focus Post often receives anecdotal evidence of frustrated consumers waiting for long periods in lengthy queues with only a minimal number of open counter positions. Our research confirms this concern with only three in five, (60 per cent) of all counter positions found to be open, with rural locations (65 per cent) scoring marginally better than urban locations (56 per cent)
- When analysed by area it was found that post offices in County Fermanagh (77 per cent) and Tyrone (73 per cent) had a greater proportion of open counter positions than other areas (Belfast: 63 per cent, County Antrim: 57 per cent, County Armagh: 51 per cent, County Down 57 per cent, County Derry/Londonderry 56 per cent). However, to some degree this can be explained by the higher level of rural post offices in County Fermanagh and County Tyrone

In the queue	Total	Urban	Rural	Crown Office	Franchise Post Office	SPSO	PO Local
Average no of people in the queue when joined	2.0	4.3	0.7	9.6	3.8	0.8	0.6
Average length of time spent in queue (mins)	2.1	3.5	1.4	5.8	3.6	1.4	1.5
Average length of customer session (mins per person)	1.0	0.8	2.0	0.6	0.9	1.8	2.5
Average no of counters (open or closed)	2.9	4.8	1.8	7.4	4.7	2.0	1.1
Average no of counters open	1.7	2.7	1.2	4.1	2.5	1.3	1.0
Per cent of counters position open	60 %	56 %	65 %	55 %	53 %	65 %	88 %

## Customer interaction

Our survey team found that the customer interaction with staff in post office was largely positive. Counter staff were evaluated by a number of service categories, including *appearance, manner, attitude, knowledge and clarity and depth of information provided*.

- Crown Offices performed excellently in all measurements of customer service, scoring almost full marks in each service category. This is strong evidence of the progress Post Office Limited has made in modernising and developing their network into centres of sales and service excellence
- Franchise Post Offices performed well in all service categories with an average score of nine out of 10. This was marginally better than SPSOs which typically scored eight out of 10

- Although we accept that the PO Locals visited were pilots and newly established, it is still worrying to see the how poorly they perform against other post office types. Although an average score of seven out of 10 was recorded, for some categories scores were as low as between three and five out of 10. They performed particularly poorly on attitude of staff and the professional appearance of staff
- Only seven in 10 counter staff were reported as allowing consumers time to make secure sensitive documents or cash after their transactions

While quality of service in the majority of post offices across Northern Ireland is high, many postal consumers who are not fortunate to live or work near a Crown Office branch appear to receive a slightly inferior service.

With only eight Crown Offices branches in Northern Ireland, more investment in staff development and training must be made by Post Office Limited to ensure the service provided by staff at the rest of their network is equal to that at their Crown Office counterparts.



## Staff knowledge and advice

To assess the depth of knowledge of staff in post offices across Northern Ireland, we felt the best approach was to use realistic consumer scenarios. Consumer Focus Post has received anecdotal evidence that many consumers are not well-informed on the correct service to use when posting their letters and parcels, and are occasionally wrongly advised by counter staff. The scenarios below were designed to test the quality of advice and information provided at post offices throughout Northern Ireland.

### Scenario one

Counter staff were presented with a DL/C5 envelope containing one sheet of paper, and asked how much it would cost to be sent by First Class Mail to an address in Northern Ireland. The survey team were asked to record: if the correct price was provided; if any additional information or advice was offered; and if correct proof of posting was provided.

The correct response for this scenario was for the counter staff to provide the fieldworker with a Certificate of Posting or valid receipt with the delivery address detailed on the docket. A Certificate of Posting provides proof of posting which affords consumers the opportunity of claiming compensation in the event of loss, damage or delay to their mail.

Our survey found that:

- Almost all (99 per cent) counter staff provided the correct price, with only one urban post office failing to do so
- When asked if a proof of posting could be provided for the letter that had been posted, a multiple responses were received:
  - A third of customers (37 per cent) were offered a Certificate of Posting and 17 per cent were told their receipt was proof of posting
  - One quarter (26 per cent) of staff enquired about the value of the item posted and its suitability for Recorded Delivery
  - Two in 10 (22 per cent) staff enquired about the value of the item posted and its suitability for Special Delivery

### Scenario two

In this scenario we tested the advice offered to consumers enquiring about the best service to use when posting a valuable item, which is time sensitive. We wanted to test if staff advised of the correct product, ie Special Delivery, by probing for further information, such as contents and value.

Our survey found that:

- When asked for the most reliable way of sending a valuable, time sensitive item to ensure arrival the next day
  - Two thirds (65 per cent) of counter staff enquired as to the contents of the parcel
  - And, only half (50 per cent) enquired as to the value of the contents

- Almost all (94 per cent) officials correctly advised that the item should be sent using Royal Mail's Special Delivery service
- Four in 10 officials went the 'extra mile' providing consumers with additional information, such as, an explanation of the different types of postal services, advised that special delivery would be guaranteed to arrive before 1pm the next day, and advised the contents would be insured up to £500

Consumer Focus and Consumer Focus Post have continuously raised the lack of information provided to consumers on the issue of 'Certificates of Posting' provided at post offices with Royal Mail. Certificates of Posting are important as they afford consumers the opportunity of claiming compensation from Royal Mail in the event of loss, damage or delay to their mail. The findings from scenario one verify our concerns. Not only are many consumers not being offered a Certificate of Posting, but an inconsistent approach of either offering a receipt or a handwritten Certificate of Posting docket, is demonstrated at many branches. Postcomm's recent decision<sup>24</sup> to classify Certificate of Posting as a Universal Service product, underlines the importance of this service. Therefore, we would urge Royal Mail and Post Office Limited to start working together immediately to ensure a consistent approach and that these important receipts are offered, without prompt, to every consumer who uses a mail service.

Together, these scenarios demonstrate that Post Office Limited should review the training requirements of staff across the network. It is pleasing to see that the correct service was offered on almost all occasions and indeed that some officials took the time to provide helpful information and advice to consumers on the service they were purchasing.

### Display of opening hours

As the majority of post offices in Northern Ireland are independently operated, opening hours throughout the branch network can vary considerably. Some post offices operate on a part time basis while others, like the newly established PO Local models, can open up to seven days a week. Consumers are often confused about when their post office is likely to be open and this can cause much inconvenience.

Our survey found that almost one in five (19 per cent) post offices visited did not display their opening hours. Crown Offices (88 per cent) and SPSO's (82 per cent) were more likely to have their opening hours clearly displayed than Franchise Post Offices (74 per cent).

<sup>24</sup> <http://bit.ly/pjNeoa> (PDF)

# Conclusion

Consumer Focus Post is committed to ensuring the Post Office network in Northern Ireland fully meets the needs of the community it serves and provides a high-quality, consumer-driven service. We believe the network has to thrive in order to survive, but this may not be possible if Post Office Limited does not address the needs of its consumers. Our study has illustrated the significant strides Post Office Limited has made in the improvement of the accessibility throughout Northern Ireland's post offices. Consumer Focus Post welcomes this achievement, however, a number of important issues remain unresolved across the Post Office network in relation to accessibility, service and environment, as experienced by consumers. It is now imperative that Post Office Limited shows leadership and assist their subpostmasters and agents to focus on these concerns.

The main conclusions we have reached are:

## Access

While we welcome and are pleased to see the significant improvement in post office accessibility since the previous survey in 2004, our findings suggest that there are still further improvements required to assist consumers across Northern Ireland with disabilities. The previous campaign in 2009 for improving the accessibility of post offices has clearly achieved some progress, but there is still more work to be done. In particular, concerns remain around:

- the low level of disabled car parking
- the lack of level access and drop kerbs close to many post offices in Northern Ireland
- the lack of disabled access symbols/signage at the entrance to post office premises
- the number of steps at post office entrances
- the lack of permanent ramps available or signage for temporary ramps and the unnecessary obstacles and trip hazards inside many outlets

## Environment

Our study has revealed that the quality of the branch environment is a concern for the Post Office network and its consumers. The post office of the future must be a welcoming, modern enterprise which plays a vital community role. It is clear from our survey that while the recent modernisation of the Crown Office network is paying dividends in respect of consumer service, these findings only serve to highlight the lack of investment in the majority of post offices across Northern Ireland. Our findings suggest that our current Post Office network is in urgent need of modernisation and investment. In particular, the significant level of obvious disrepair, the lack of consistent signage and the unwelcoming appearance of the interior of half of the branch network, especially in rural areas, is a major concern.

## Service

Lengthy queuing times remain a problem for Northern Ireland's busiest post offices, in particular Crown Offices and Franchise Post Offices. Our research shows that this problem is further exacerbated by the high level of closed counter positions. As many consumers turn to the internet to seek more efficient and convenient methods of undertaking transactions, Post Office Limited must ensure consumers are not discouraged from using their network because of long queues and poor consumer service.

## PO Locals

While we accept the small numbers of PO Locals visited were pilot models, our findings nonetheless suggest problems which need to be addressed before a full rollout in 2014. We are particularly concerned with the lack of facilities for disabled consumers, such as hearing loops, low level counter positions, and other important features, as well as an apparent lack of adequate staff training.

# Recommendations

## Post Office Limited

- 1 Following on from the earlier campaign in 2009, Post Office Limited should commit to undertaking a biennial disability audit, both external and internal of each post office premises throughout Northern Ireland. Working with the subpostmasters and agents, an action plan should be developed and monitored, which details the various work or adjustments to be undertaken and expected targets for the proposed completion of each stage.
- 2 We would urge Post Office Limited to ensure that the practical information on the Post Office Limited Branch Access Guide's website is replicated in signage format (ie disabled access symbols) at the point of entry to each post office premises. We would also encourage Post Office Limited to ensure the information on their Branch Access Guide's website is regularly updated.
- 3 While we understand the financial constraints under which Post Office Limited is working, we feel that consideration should be given to investing in *regular and consistent* training programmes for all counter staff regardless of post office classification or type. We believe this programme would represent an investment in the future of the post office network, not only by helping improve the consumer service provided at all branches throughout Northern Ireland but by helping to increase sales of new products and services through well informed, fully trained and motivated staff.

- 4 Post Office Limited should monitor the queuing times of consumers in their busiest branches. Wherever possible, effective queue management equipment and systems should be introduced and all counter positions should be opened at peak times.
- 5 Royal Mail and Post Office Limited must work together and develop a consistent approach to providing 'Certificate of Posting' receipts. We would request that a system is developed which does not require a prompt from the consumer for this service.

## Consumer Focus Post

- 6 Consumer Focus Post will continue, where possible, to campaign for the Northern Ireland Executive to provide a Development Fund, similar to funding available in Scotland and Wales. We believe this funding will help transform the environment in which post office services are provided and help support the sustainability of the business and the wider community within which it is situated.
- 7 With our colleagues in Consumer Focus, we will continue to work closely with Post Office Limited in the development of the new PO Local model, by providing our insight into what is working well for consumers and identify where urgent improvements and further development is required.

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