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Subpostmaster views on

Post Office Outreach Services

An Ipsos MORI research study commissioned by
Citizens Advice Scotland

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Executive summary

This report presents findings from qualitative research carried out among subpostmasters providing Post Office Outreach services. The aim of the research was to provide insight into subpostmasters' experiences of delivering Outreach services, including any challenges they faced. The findings will inform Citizens Advice Scotland's work to help ensure the sustainability of Outreach services in Scotland.

The research comprised 27 semi-structured interviews with subpostmasters who personally delivered Outreach services across England, Scotland and Wales. All fieldwork was conducted between May and July 2019.

Origin and design of Outreach services

Outreach services had broadly originated in one of two ways. Firstly, some subpostmasters had been approached by Post Office Ltd. to provide an Outreach service in an area close to their existing branch, in order to replace a traditional 'bricks and mortar' post office that had closed. Others had 'inherited' a service from a previous provider. In the main, subpostmasters were motivated to take on Outreach services by a belief in the importance of keeping a service in the local area for those who needed it, particularly in communities who could not travel easily to reach a larger branch.

Subpostmasters reported the range of services being largely determined by Post Office Ltd, who expected subpostmasters to offer the same range of services as was offered in their branch. Participants considered the choice of services as being very much out of their control, with no flexibility in this regard.

Operating Outreach services

In general, subpostmasters found providing Outreach services enjoyable and satisfying. There was a clear sense that they valued meeting consumers in the local communities they served. Positive feedback provided from community members emphasised the integral nature of the service subpostmasters were providing – one that was particularly vital for those who struggled to get out and about regularly, such as the elderly.

Despite this overarching sense of satisfaction, subpostmasters highlighted a number of challenges with the operation of Outreach services. These related to the range of services they provided; their workloads; physical aspects of their Outreach such as vehicles and equipment; and the rurality of the locations they served.

Use and awareness of Outreach services

Whilst the number of consumers using Outreach services was highly variable, subpostmasters generally felt their Outreach was well used. However, even in areas where awareness of an Outreach service was high, subpostmasters felt that consumers were less aware of the *range* of services provided, for example in relation to the extent of banking services offered.

In areas where subpostmasters felt awareness could be improved, they linked this with a need for greater advertising and communication with the communities they served. Subpostmasters described a range of approaches they had already used to inform consumers about their Outreach service. This included traditional, paper-based methods, such as leaflet drops, as well as utilising existing community resources, such as parish magazines or local newspapers. Less commonly, subpostmasters reported using online communication channels such as websites and social media to promote the service.

Support for Outreach services

Support from Post Office Ltd. tended to involve training for subpostmasters when they first started operating an Outreach service, and the Post Office Ltd. helpline, accessed by subpostmasters when experiencing a technical issue. The dominant view among subpostmasters was that the level of contact they received from Post Office Ltd. was minimal, and that the support provided in relation to operating their Outreach service was insufficient.

Subpostmasters also outlined varying levels of financial support from Post Office Ltd. to operate their Outreach services. The level of financial support received appeared to vary, both in terms of the nature of provision and the amount provided. There was also inconsistency when it came to pay increases from Post Office Ltd.: some subpostmasters had recently received an increase in the amount they received, whilst others expressed concern at the lack of increase in financial support for a number of years.

For the most part, subpostmasters were not concerned about the profitability of their Outreach service, as they felt the service could be sustained by the financial support provided from Post Office Ltd. However, should there be any changes in financial support available, such as a reduction in the fixed fee provided by Post Office Ltd., they felt this would hinder the long-term sustainability of the service.

The future of outreach services

Looking to the future, subpostmasters generally planned to continue operating their Outreach service indefinitely. This was, in part, linked to participants' overall sense of satisfaction and enjoyment in providing a much-needed service to communities. A more negative, though less common, view was that the Outreach service was part of the contractual obligation of their role as a subpostmaster, so they felt somewhat "stuck" with the service.

Few subpostmasters had plans to develop their Outreach service beyond its current level, mainly because they felt they were already at capacity in terms of the time and resources required to deliver the service. Whilst some subpostmasters had aspirations to develop their services further, such plans were dependent on the availability of additional resources.

While subpostmasters were generally keen to continue operating their Outreach, there were mixed views about future demand for their service. On the one hand, it was speculated that there may be increasing need for Outreach services if more post office branches in rural communities were to close. On the other hand, it was suggested that as populations in rural communities aged but were not replaced, use of Outreach services could decline, as older customers were seen as the core base for many subpostmasters.

Introduction

Background

Postal services play a vital role in local communities, offering not only a range of key services - from mail services, to banking and finance, and bill payment - but in some cases doubling as local corner shops and social hubs. As shown in previous research, post offices are particularly important to certain segments of the population, including older people, those with disabilities, those on a low income and people in rural areas who often have limited access to alternative service provision or social networks¹. Citizens Advice research published in 2017 found that over 4 in 10 (44%) rural consumers used a post office for at least one community service, such as finding information about events and local services, meeting other local residents, and obtaining informal help and advice. More recent research from the Association of Convenience Stores (ACS) found that rural shoppers thought post offices were the most valuable services available in their local community – and post office services the most valuable aspect of provision available within their local convenience stores, with cash machines as the second most valuable.²

Ipsos MORI's own recent research for Citizens Advice Scotland (CAS) on support for vulnerable consumers³ in the regulated industries reinforced these findings, and particularly the significance of *informal* services and support provided by Post Office staff. Participants described how staff commonly made specific efforts to speak with vulnerable clients to check on their wellbeing or assist them with the completion of forms and other in-branch administration. Such examples of 'under the radar' but nonetheless vital support only serve to reinforce the crucial social function of post offices in local communities.

The Post Office Ltd.'s Network Transformation Programme has seen the number of 'bricks and mortar' post offices across the UK decline significantly, with a growing number of consumers served by Post Office Outreach services, instead. There are four Outreach service models, designed to retain some access to postal services in areas where main or local post office branches are not commercially sustainable. The four models include:

- The Hosted service: a subpostmaster from the nearest local or main post office branch provides some postal services in an alternative venue (such as a community centre, town hall, shop or public house) on certain days of the week, at certain times;
- The Partner service: post office services are provided by a local partner in the community (such as a local retailer), supported by Post Office Ltd./the local subpostmaster;
- The Mobile service: the local subpostmaster provides postal services from a vehicle that visits the area at set times of day and days of the week;

¹ Consumer Futures Unit Work Plan 2018-2019: https://www.cas.org.uk/system/files/publications/2018-03-05_cfu_2018-19_work_plan_final.pdf

² [https://www.citizensadvice.org.uk/Global/CitizensAdvice/Post%20and%20Telecoms/Post%20Office%20News%20-%20March%202019%20\(public\)%20\(1\)%20\(1\).pdf](https://www.citizensadvice.org.uk/Global/CitizensAdvice/Post%20and%20Telecoms/Post%20Office%20News%20-%20March%202019%20(public)%20(1)%20(1).pdf)

³ <https://www.cas.org.uk/publications/making-it-easy-simpler-registration-consumers-vulnerable-situations>

- The Home service: pre-ordered services are delivered directly to the consumer's door, or to a community collection point, by the local subpostmaster. This model is only offered to the most isolated consumers and is, as such, the least prevalent model.

Given the expansion of these Outreach services, CAS is keen to ensure that Outreach provision is meeting the needs of the local communities they serve, and remains sustainable. These issues are all the more significant against a backdrop of local bank closures and calls in some quarters for increased use of post offices to provide banking services⁴.

Consumer research on Post Office Outreach services⁵, conducted by Ipsos MORI and Involve in 2017, went some way to addressing these issues, helping to identify criteria that consumers valued most in an Outreach service. At the same time, the consumer perspective is only part of the picture and CAS identified the need to supplement the findings from that research with an assessment of Outreach services from the perspective of those providing them.

It is against this backdrop that CAS commissioned Ipsos MORI to carry out research with subpostmasters, to provide insight into their experiences providing Outreach services, including the key challenges they faced and how they feel this impacted on the future provision of Outreach services.

Research objectives

The research aimed to understand the challenges faced by subpostmasters in running an Outreach service, and their perspectives on how these services can be better supported to ensure they meet consumer needs and remain sustainable in the future.

Key issues explored in the research included:

- how subpostmasters set up and run Outreach services;
- subpostmaster engagement with customers and the communities within which they operate;
- the relationship between Post Office Ltd. and subpostmasters;
- and subpostmasters' views on the future, and sustainability of, Outreach services.

Methodology

The research was conducted using a qualitative approach, comprising 27 semi-structured telephone interviews with subpostmasters who provide at least one Post Office Outreach service in Scotland, England or Wales.

Sampling and recruitment of subpostmasters

Subpostmasters were recruited using two methods. Firstly, subpostmasters were contacted through the National Federation of Subpostmasters (NFSP) via their monthly Subpostmaster magazine, and a number of social media channels, including local WhatsApp groups. Using these channels, an advert was distributed which explained the purpose, nature

⁴ See, for example, the Scottish Parliament Inquiry on the Impact of Banking Closures:

<https://www.parliament.scot/parliamentarybusiness/CurrentCommittees/107957.aspx>

⁵ <https://www.cas.org.uk/publications/keeping-communities-connected-consumer-views-post-office-outreach-services>

and importance of the research, as well as reassurances about confidentiality and anonymity. It further explained how participants could opt-in to the research by phoning a Freephone number or emailing a member of the research team on the contact details provided. Those opting-in to the research were then contacted by a member of the research team, who checked their eligibility against a screener questionnaire; provided reassurances about anonymity; answered any questions they had; and arranged a convenient time for the interview. This recruitment approach yielded a total of 12 participants based across Great Britain.

Secondly, telephone recruitment was carried out using a database of all 'bricks and mortar' Post Office branches in Scotland. The database was sourced from one of Ipsos MORI's external suppliers of business data and included a list of businesses that had agreed to be contacted for research purposes, as well as a contact name, branch address and phone number. Once this database was sourced from Ipsos MORI's external supplier, it was then edited, removing branches in areas that were determined to be of a low likelihood of providing an Outreach service, such as inner-city areas. Once edited, the sample contained records for 822 Post Office branches in Scotland. Each record was then contacted to determine whether an Outreach service was being operated from the branch, and, if so, if the subpostmaster would be willing to take part in the research. Willing participants were then screened for eligibility and booked in for an interview with a member of the research team. This recruitment approach yielded a total of 15 participants based in Scotland.

Given the small size of the total subpostmaster population, specific quotas based on subpostmaster characteristics were not set. Instead, care was taken to interview as mixed a group as possible in terms of the type of Outreach service delivered; the length of time for which subpostmasters had been providing Outreach services; and the number of Outreach services they provided. The single eligibility criterion was that participants were currently personally providing at least one Post Office Outreach service in Great Britain. A breakdown of the achieved sample is set out in Table 1.1, below.

Table 1.1: Achieved sample of subpostmasters recruited

<i>Location</i>	<i>Number of participants</i>
Scotland	15
England and Wales	12
<i>Type of Outreach provided</i>	
Hosted	17
Partner	5
Mobile	8
Home	1
<i>Number of Outreach services provided</i>	
One	11
Two to five	7
Six or more	9
<i>Length of time providing Outreach services</i>	
Less than one year	4
One year to five years	8
Six years or more	15
<i>Work in a branch</i>	
Yes	23
No	4
Total participants	27

Discussion guides and interviewing

All interviews followed a semi-structured discussion guide, designed by Ipsos MORI in consultation with CAS and the NFSP. Participants were asked to provide background information about their Outreach services, including the number of services they operated, what form their provision took, and the frequency with which they provided Outreach services. Participants were also asked for information about the range of services they provided as part of their Outreach, the relative popularity of different products and services, and whether they planned to develop, reduce or withdraw their service.

The topic guide also covered questions relating to the communities within which they operated their Outreach. This included perceived community awareness of their services, and how they communicated with their customers about their provision. Participants were also asked about any training they have received, as well as any formal or informal support services they have accessed, to assist them in running their Outreach service. Finally, participants were asked to share their views on the future of Post Office Outreach services.

All fieldwork was carried out between April and July 2019 by the Ipsos MORI research team. Participants were given £30 as a 'thank you' for their time.

All interviews were audio-recorded with participants' permission. A selection of interview recordings were transcribed for analysis purposes. The transcripts and interviewer notes were then systematically analysed⁶ to identify the substantive themes that emerged in relation to each question in the discussion guide, along with key points and illustrative verbatim comments. This ensured that the analysis of the data was rigorous, balanced and accurate, and that key messages or concepts were highlighted. It was also flexible enough to allow links and connections across different themes or sub-themes to be made, and for moments of interpretive insight and inspiration to be recorded.

Interpreting qualitative findings

Qualitative research does not aim to produce a quantifiable or generalisable summary of population attitudes, but to identify and explore the different issues and themes relating to the subject being researched. The assumption is that issues and themes affecting participants are a reflection of issues and themes in the wider population concerned. Although the extent to which they apply to the wider population, or specific sub-groups, cannot be quantified, the value of qualitative research is in identifying the range of different issues involved and the way in which these impact on people.

Structure of the report

The structure of the report largely reflects the structure of the topic guides used during interviews. The next chapter of the report describes the origin and design of participants' Outreach service provision. Chapter 3 describes their experiences of providing Outreach services. Chapter 4 covers participants' use and awareness of the Outreach services, including methods used to raise awareness. Chapter 5 explores their experiences of seeking, and needs in respect of, support and advice. The penultimate chapter covers participants' thoughts on the future of Outreach services, and the final chapter concludes with a summary of key findings.

Acknowledgements

Ipsos MORI would like to thank the 27 subpostmasters who gave up their time to take part in the research. Thanks are also due to Kristin Hartman and David Moyes at CAS, and Peter Hall and colleagues at the National Federation for Subpostmasters, for their valuable input and advice throughout the project.

⁶ The interviewer notes, supported by audio recordings and transcripts, were summarised under key thematic headings, structured around the research questions. The resultant 'thematic matrix' was then systematically interrogated to identify the full range of participants' views and experiences on each issue/question, and any relationships between particular views and experiences.

Origin and design of Outreach services

This chapter looks at the origin of Outreach services, including how they came to be established, and how subpostmasters came to be involved in their delivery. It then explores decisions relating to the design of Outreach services, including the times and locations an Outreach service will operate, and the services it will offer consumers, as well as any involvement from the local community in such decisions.

Origin of Outreach services

Outreach services had broadly originated in one of two ways. Firstly, some subpostmasters had been approached by Post Office Ltd. to provide an Outreach service in an area close to their existing branch, in order to replace a traditional 'bricks and mortar' post office that had closed. Others had 'inherited' a service from a previous provider - either when buying a branch that was attached to an Outreach service, meaning they were contractually obliged to continue the Outreach, or from a local subpostmaster who had chosen to retire. All subpostmasters reported that their Outreach services were intended to be permanent replacements of 'bricks and mortar' post offices for the local communities they served.

"... the choice was, we either had the post office or we didn't. But if we took [over] the post office then the Outreach services had to come with [it]. There was no negotiation as far as that part of it was concerned."

Subpostmaster, Hosted, home and partner service

Predominantly, subpostmasters were happy to take on the Outreach service they were offered or had inherited. The main motivation for doing so was a belief in the importance of keeping a service in the local area for those who needed it, particularly in communities who could not travel easily to reach a larger branch.

"...if we hadn't [set up the Outreach] it would have meant there would be nothing in the village at all for [local people to access banking services]. People would have had to travel to the nearest post office which is three and a half miles away. Which doesn't sound a lot, but there is no [regular] bus service there."

Subpostmaster, Partner service

More exceptionally, subpostmasters agreed to start an Outreach as they felt it would offer an additional source of income and therefore make their business as a whole more financially viable. Another subpostmaster felt the Outreach service would make their branch less susceptible to risk of closure, as it would increase the customer base reliant on their service and therefore strengthen its position.

"... I thought [taking on a mobile service] would help secure our position if there was another round of [branch closures] ...now I don't think we would be closed if there was another round of closures, because we are actually covering fourteen offices that have already closed."

Subpostmaster, Hosted and mobile service

Design of the Outreach service

Services provided

The range of services that can be offered by an Outreach service mirror those of a 'bricks and mortar' post office branch and can be broadly grouped into six service types. These are shown in Table 2.1 below along with the number of participants who provided each service.

Table 2.1: Outreach services provided

Service type	Number of participants providing the service
Postal services – including sending and receiving mail	27
Financial services – including banking, cash deposits and withdrawals, and money transfers	27
Bill paying – e.g. utilities, phone, council bills, insurance, income tax	27
Retail services – including stamps and stationery etc.	20
Travel services – e.g. Travel Money Card, Bureau de Change	20
Government services – e.g. vehicle licencing, passport applications, driving licence applications	6

As shown above, all participants provided postal, financial and bill paying services, and most provided retail and travel services, though not always the full range of these (e.g. some provided travel insurance, but not travel currency, or vice versa). Government services were the least commonly provided service.

When it came to selecting which of these services to offer, participants reported this being largely determined by Post Office Ltd, who expected subpostmasters to offer the same services as were offered in their branch. In the main, participants were content with this arrangement, as they agreed that customers should have access to a comprehensive range of services that matched those of a traditional branch, rather than having restricted provision. However, participants also noted the choice of services as being very much out of their control, with no flexibility in this regard.

"...we're totally governed by what [services] we can and can't [offer] by the Post Office and their legislation. We don't really have any flexibility about that at all."

Subpostmaster, Partner service

"I don't think the services really are variable, you know, they are what they are, it's just a fixed set of services that you can offer from the computer system. I don't think you can kind of pick and choose what you can do and cannot do. "

Subpostmaster, Mobile service

Location and venue

Outreach services were located in communities that had previously had a 'bricks and mortar' post office which had since closed. As with the choice of services, participants noted that the choice of location was made by Post Office Ltd, rather than by subpostmasters themselves.

For hosted and partner services (i.e. those provided from a building) a variety of venues were used including local shops, village halls, churches and hotels, and subpostmasters were generally satisfied with these. Venues were typically chosen because they were in a central location that was convenient for consumers, and because they were accessible for older customers or those with accessibility needs. There was also a perception that hosted and partner services were best located in a venue that served multiple purposes – such as a community hall or village shop – as this would allow customers to access multiple services from a single site.

"They are pretty small villages so there is not a huge amount of places to choose from. [But ideally you want] somewhere that is available, with decent access for people... and somewhere for us to be able to have our equipment, have all of sockets and everything put in, and be able to have space to set up and also to be warm."

Subpostmaster, Hosted service

As mentioned above, there was often little choice in relation to the venue used for an Outreach, due to a lack of options locally, particularly in small rural communities. In some instances, participants were dissatisfied with the choice of venue because they were in a deteriorated condition, were located in an area that was not accessible for customers, had poor internet connection and telephone signal impacting the reliability of their Horizon system⁷, or they were located too far away from the centre of the village they were serving.

Operating days and times

In terms of when Outreach services were provided, all were based on a regular schedule, with the service being delivered in set places at consistent times each week. Subpostmasters who had inherited their Outreach continued to operate on the same schedule adhered to by the previous subpostmaster. Others reported the Outreach delivery schedule was often set by Post Office Ltd, sometimes with some input from the local community (see section below).

In cases where subpostmasters did not think this schedule was optimal and expressed a desire to adjust timings, some felt they did not know who to contact at Post Office Ltd to make this happen. This was of particular concern for participants who felt their operating hours were not suitable to consumers in their local areas. Some participants reported receiving

⁷ 'Horizon' is the IT system used by Post Office Ltd. It refers to both the hardware and software used to provide technological solutions for the delivery of post office services, and to support post office staff. It includes a point of sale system, as well as communications equipment and digital training.

feedback from customers who expressed a preference for the Outreach to be available for longer hours, emulating full working days, so they would have more opportunity to access the service.

"There is only so [many] hours in a day...It varies at different locations. Sometimes you're in the village and the villagers can get there easily, those who stay [further out of the village] have to get there by a certain time and a lot of them rush in to catch you."

Subpostmaster, Hosted service

Community involvement in setting up the Outreach service

Participants identified two key ways in which local communities were involved in the setup of Outreach services. Most commonly, such community involvement was fairly informal, and involved subpostmasters getting in touch with the local parish councils or other community representatives to discuss operating days and times. Subpostmasters also reported the use of public consultations, often arranged through Post Office Ltd., where communities expressed views on various aspects of service delivery, including location, opening hours and venues.

"...it all goes through the Post Office [Ltd.] and then it's put out to the public to let them know that the Outreach will be starting, and if anybody has anything to say about it there's an address you send your queries and your things to."

Subpostmaster, Hosted service

Less commonly, communities had organised the set up of the Outreach service themselves, buying out a local community shop or space and running a partner or hosted Outreach service from it, staffed by local community members. Such communities were motivated by the loss of multiple services, such as banks, postal services and even local convenience stores, and felt a community buy-out was necessary to provide for the local population.

"... we decided that we would do a community takeover of the post office to keep it viable, to keep it working for the community... it's staffed with volunteers and three paid part time members of staff. Now if we hadn't done that it would have meant there would be nothing in the village at all for [local businesses or villagers]."

Subpostmaster, Partner service

While communities were generally positive about and welcomed the introduction of Outreach services, on rare occasions subpostmasters had experienced negative reactions when the service first began, as community members were unhappy that their local 'bricks and mortar' branch had closed. In some cases, this led people to seek provision from an alternative post office branch rather than using the Outreach service, though in others this ill-feeling had been temporary and the local community eventually grew to accept and make use of the Outreach service.

"Initially when we started mobile van one, the communities that we were visiting were very against it. They were absolutely disgusted that their branch had been closed, so there was a lot of ill feeling to start with. Now, they have accepted us and are quite happy to have us as a mobile service."

Subpostmaster, Hosted and mobile service

"All of the communities have been [involved] in some ways. One of them, they were very positive about it, and one of them they were very negative about it. The one that was very negative, they didn't want to lose their permanent post office, it's the one we really struggle with the footfall."

Subpostmaster, Hosted service

Operating Outreach services

This section focusses on subpostmasters' experiences operating Outreach services, as well as outlining their general satisfaction with delivering the service and the key challenges they faced in their day-to-day operations.

General satisfaction

In general, subpostmasters found providing Outreach services enjoyable and satisfying. There was a clear sense that they valued meeting consumers in the local communities they served. They felt this sentiment was shared by consumers, who would express to subpostmasters their happiness at still being able to access postal services locally, despite their 'bricks and mortar' office having closed down. Positive feedback provided from community members emphasised the integral nature of the service subpostmasters were providing – one that was particularly vital for those who struggled to get out and about regularly, such as the elderly.

"For me, personally, it is quite enjoyable and rewarding being able to service a large part of the county, and being able to provide a service that was non-existent for a period of time...[this area] is a cash point desert, so [our] cash withdrawals and pension withdrawals really are a lifeline to some of our customers."

Subpostmaster, Mobile service

"...the ones that know about it and use it are hugely appreciative [and] thankful, which is nice, [you feel] that sense of reward around genuinely helping someone in their life when they perhaps can't drive a car."

Subpostmaster, Mobile service

Despite this overarching sense of satisfaction, subpostmasters highlighted a number of challenges with the operation of Outreach services. These related to the range of services they provided; their workloads; physical aspects such as vehicles and equipment; and the rurality of the locations they served. These are outlined in turn below.

Range of services

In the main, subpostmasters were satisfied with the range of services they provided. They were largely able to provide the full range of post office services, with the main exception being government services (as outlined in Table 2.1). They also noted that consumers predominantly used an Outreach for postal and banking services (specifically pension withdrawals, cash withdrawals and deposits). Subpostmasters observed a recent increase in demand for banking services, which they felt was due to local banks and cash points closing in the communities they served.

"The villages don't have cash machines or anything so that is the only way for them to post things, get cash, top up their phones."

Subpostmaster, Hosted service

"Mostly we can provide what most people come in with. There's not much that you can turn them away or tell them we can't do that."

Subpostmaster, Hosted service

These findings echo those of the consumer research carried out in 2017, which found that the post office services considered most important to consumers in rural areas were: postal services, as there was felt to be few other outlets, if any, that provided these services locally; and financial and banking services, as these were viewed as particularly important in rural communities that did not have a bank or cash machine, making the post office the only resource that people could use to carry out banking transactions.

While subpostmasters tended to be satisfied with the range of services they offered, they noted some demand from consumers for services that were unavailable, specifically, government services such as passport 'check and send' or vehicle licencing. Participants commonly said they did not know why they did not offer these services (as service provision was decided by Post Office Ltd.) but speculated that it was because these services had not been available at the former post office branches the Outreach service were designed to replace. Others explained that the nature of Outreach meant the full range of services could not be provided, due to an inability to transport the necessary equipment and technology to Outreach sites, or, in one instance, because the local council had prohibited them from providing retail goods.

"...technology gets in the way, so at our main office we provide a service that tops up peoples' energy keys, but we haven't been able to do that at the Outreach service, because they can't provide the technology for us to do it."

Subpostmaster, Hosted service

"At the Outreach site I am not allowed to have any retail, so I cannot sell an envelope or a roll of Sellotape or anything like that it is purely postal service and that is [the local councils] decision... You get a customer who comes in and maybe wants to tax their car and they also have something that they need to put in a jiffy bag to post, and I've got to stand there and say, sorry, I can't do either of those for you. They have maybe driven half a mile, a mile to get to us."

Subpostmaster, Hosted and mobile service

Workload

Workloads were identified as a key issue, with subpostmasters often juggling provision of multiple Outreach services across a large geographic area, while also working in a local branch. For the busiest of subpostmasters, this was often as a result of taking on more Outreach services than they had initially intended, having been requested to do so multiple times by Post Office Ltd.

Whilst, in the main, subpostmasters did not have to provide Outreach outwith their normal working hours, it was reported that Post Office Ltd. did not consider travel and set-up time when determining Outreach hours - meaning providing two hours of Outreach became a more substantial time commitment when factoring in any travel, set-up and subsequent financial management. These additional demands on subpostmasters' time meant that some participants had found it difficult to take any planned time off.

Conversely, some subpostmasters reported feeling underutilised at certain Outreach locations. This was, in part, due to lack of footfall in some areas, sometimes despite attempts to increase awareness of the service. Participants described feeling frustrated because they were “wasting time” waiting for customers on quiet days or in quiet locations. However, some mitigated this by bringing tasks from their branch, such as paperwork or marketing, to complete during periods when they did not see customers.

Equipment and vehicles

In terms of equipment, those providing hosted services reported that the mobile Outreach kit (which included a mobile till system, a printer for labels and a secure cash carrying case) was bulky and difficult to transport.

"We're in 2019 - why don't they give us a tablet with a chip and pin on the back, and Bluetooth to the printer and a Bluetooth barcode scanner?... But no, we get this 'spaceship'...it's heavy, it's bulky, and it's not fit for purpose."

Subpostmaster, Hosted service

In addition to difficulties caused by cumbersome kit, the Horizon operating system was reported to be temperamental and unsuitable for Outreach services. In one instance, a subpostmaster providing a hosted Outreach service explained how a change to the Horizon log-in system meant they needed separate I.D.s for their Outreach terminal and branch terminal, which had added an extra hour of administrative work each week.

For mobile services, providing Outreach from a van raised further challenges. Poor weather conditions could see subpostmasters sat for long periods of time in very cold vans, whilst access to toilets and suitable breaks was made difficult by being in remote, isolated locations.

"When the Post Office set the mobiles up, there was no consideration given for comfort breaks and our council have closed most of the public toilets. So, that can be a very uncomfortable day. Also, the timings between sites, there is no allowance made for a lunch break, so basically, you've got to have a bite of a sandwich, serve a customer, come back, have another bite out your sandwich, serve your next customer. It hasn't been well thought out as far as staff is concerned."

Subpostmaster, Mobile service

Rurality of location

The secluded nature of locations served by Outreach meant that issues with the weather (such as flooding or snow) and poor road conditions could make it difficult for subpostmasters to reach Outreach locations. Remoteness of location also had an impact on feelings of safety, with subpostmasters at times feeling vulnerable when carrying large quantities of cash to somewhat isolated areas. Indeed, one subpostmaster felt that safety concerns may hinder his ability to hire staff to provide Outreach service in future. For some, these worries of safety were mitigated by following Post Office Ltd. guidelines, such as only carrying a certain amount of cash, and carrying a panic alarm; however, for others, these concerns remained at the back of their mind.

Use and awareness of Outreach services

Consumer research carried out by Ipsos MORI and Involve for CAS highlighted a lack of awareness of Outreach services among those who lived in or close to areas they covered, and suggested that these services may therefore be under-utilised. This section explores subpostmasters perspectives on the use of Outreach and the extent to which they felt communities were aware of these services.

Use of Outreach services

Subpostmasters generally felt their Outreach services were well used, though this varied depending on the location and the specific Outreach service being delivered. Typically, Outreach services were used by a core set of regular consumers that tended to be made up of three main groups: older people (over pensionable age) using the Outreach service for withdrawing pensions and cash; local businesses carrying out banking and other financial transactions, due to the lack of a local bank branch; and younger residents using postal services for items they purchased and sold online, through sites such as eBay. Of these, older consumers were considered the most common users of the services.

"...it's the same people using it over and over again. Occasionally you will get someone who has maybe moved into a village on one of our visiting sites and they said, oh, I didn't realise that we had a mobile service, because nobody had told them."

Subpostmaster, Hosted and mobile service

The number of consumers using Outreach services was highly variable, ranging from one or two on a particularly quiet day, to over fifty on busier days. Such variability tended to reflect the size of the communities being served, with larger areas of population being more likely to have a higher number of consumers. Footfall was also impacted by the location of the Outreach services themselves, with participants attributing lower footfall to their service being located on the outskirts of the village, or in areas with poor access to public transport. Areas with fewer businesses based in the vicinity also tended to see a lower footfall.

Awareness of Outreach services

Subpostmasters were generally satisfied with the level awareness of their Outreach services. However, even in areas where awareness of the Outreach service was high, subpostmasters felt that consumers were less aware of the *range* of services provided, for example in relation to the extent of the banking services on offer.

"We could always increase awareness, because people are just not aware of what we actually do... [people don't realise] that we're effectively the biggest bank in the country."

Subpostmaster, Mobile service

Awareness of Outreach services was seen as being directly linked to the level of promotion of the service. In areas where subpostmasters felt awareness could be improved, they linked this with a need for greater advertising of the service and communication with the community. One subpostmaster noted that even if people knew about their local Outreach, it "occasionally slips their mind because you're only there two hours a week", therefore emphasising the need for ongoing communication efforts. This mirrored the views of consumers in the earlier research, who suggested that stronger

promotion of Outreach services was necessary to encourage awareness and use of them. In that research, consumers felt the range of services available should be clearly communicated so customers are aware of what is and is not available.

Word of mouth was also seen as a key tool through which communities became aware of services, particularly in small communities where word of mouth spread quickly. Where an Outreach service was serving a larger or a more dispersed geographic area, awareness of services tended to be lower, since communities were less 'tightly-knit' and word of mouth took longer to spread.

Over and above promotional activity, awareness was linked to the level of dependency on the Outreach service and, therefore, was somewhat out of subpostmasters' control. Participants noted that awareness was higher in areas where consumers were heavily reliant on the Outreach service, particularly where it was located in the only shop or community building in a village. By contrast, awareness was lower in areas where people were able to reach a core branch in a nearby location; an issue which could be exacerbated when there is a delay between the closure of a 'bricks and mortar' office and establishing an Outreach service, as in that period local residents may start using an alternative branch if available.

Awareness-raising methods

Subpostmasters described a range of approaches they had effectively used to promote and inform people about their Outreach service. These included traditional, paper-based methods such as posters and notices displaying opening hours; leaflets and handouts distributed to community members; and maps to help people locate the service. Subpostmasters had also promoted their service through existing community resources, such as parish magazines or local newspapers. Some also reported making efforts to raise awareness in-person, by attending village events or working with local businesses; for example, one participant worked in an area where the local reverend would talk about the Outreach service in their weekly sermon.

The use of online communication channels was less common than the more traditional approaches outlined above, but some had used social media pages and websites (such as parish council or community council website) to promote their Outreach service. However, there were mixed views on the effectiveness of online methods of communication. While they were understood to be useful tools, subpostmasters acknowledged online communications excluded those without internet access, or those not comfortable using such sources. This was particularly a concern in relation to elderly members of the community, who made up a core proportion of the Outreach consumer base. For this reason, subpostmasters generally felt that social media was not a sufficient means of communication alone, but should be supplemented with one or more of the previous, more 'traditional', approaches.

"I've gone to the expense of having postcards made up which are the core branch and the four outreaches that we do, to hand out to consumers to give to friends and relatives, et cetera."

Subpostmaster, Hosted, home and partner service

"I have my own Facebook page [and] I email the community [...] but, I know that there are certain members of the public that are not electronically-minded, and they need a phone call, [...] it has to be half and half."

Subpostmaster, Hosted and mobile service

As well as general awareness raising, subpostmasters sometimes need to communicate a last-minute change to service provision with consumers, for example in the event of illness or other circumstances outside of their control. In such cases, subpostmasters phoned venues, or, on rare occasions, even consumers directly to inform them of a change in provision. It was acknowledged that this was time-consuming, but participants felt they sometimes had no alternative. The immediacy of social media was also seen as useful in these situations; however, it was also considered less reliable, since consumers may not check it in time.

"I've got two customers that are immensely regular, I would probably phone them at home [...] because it's just how it works."

Subpostmaster, Hosted service

Subpostmasters generally carried out awareness raising activities themselves, and received little by way of external support. There were notable exceptions, with one participant having received £100 from a Post Office Ltd. community fund to help distribute leaflets. Further, some subpostmasters said Post Office Ltd. directly provided them with posters and leaflets to help promote their service. However, these were not always viewed as useful, as they provided fairly generic information and, on occasion, listed services that were not available from that particular Outreach. There was also some evidence to suggest that Post Office Ltd. provided some resources for signage, however one subpostmaster found this to be a lengthy and sometimes unreliable service.

It is worth noting that not all subpostmasters carried out advertising. Those who chose not to do so typically felt it was unnecessary, as they were happy with the current awareness levels. The costs associated with marketing and communications were also seen as prohibitive, while lack of time was also cited as a restriction, especially as subpostmasters often created marketing materials themselves. Others noted that while advertising would be beneficial, they lacked the knowledge and skills to do it.

In light of these constraints, participants felt that financial support specifically for marketing and promotional activity would be welcomed. They also suggested that Post Office Ltd. could take more direct responsibility for advertising, by creating more promotional materials related to their Outreach services, but also by more generally promoting post offices and the range of services they offered. While there was more of a focus on support for general promotional activity, one subpostmaster suggested that Post Office Ltd. could help them better communicate with consumers by providing a mobile text message-based system, through which they could automatically send text updates about service changes.

Support from Post Office Ltd.

The following section outlines the nature of support and advice received by subpostmasters for running their Outreach service, including any training and advice from Post Office Ltd., and any financial support provided to help operate the service. It also sets out what additional support, if any, subpostmasters felt was required.

Training and operational support

All participants had communicated with Post Office Ltd. at some point since they started operating the Outreach service. However, the dominant view among subpostmasters was that the level of contact they received from Post Office Ltd. was minimal, and that the support provided in relation to operating the Outreach service was not sufficient.

The support provided by Post Office Ltd. tended to be in the form of training for subpostmasters when they first started operating an Outreach. This training was provided by Post Office Ltd. staff and typically covered practical advice on how to run the Outreach service, including how to operate the equipment and use the Horizon system. However, such training was not provided to all participants – some had received training when they first started operating a post office branch, but not when they were setting up the Outreach service. Additionally, training was not uniformly delivered, ranging in duration from one day to one week.

Views on the quality of training from Post Office Ltd. were very mixed. On the one hand, participants felt it was useful in helping them to understand the mechanics of operating an Outreach service, and they described the staff who delivered the training as supportive and helpful. Others were more critical, describing the training as “rushed” (particularly those who had one or two-day long training) and noting that it was not tailored enough to Outreach services specifically (as opposed to a post office branch).

"We had just one [training] visit, but that was all that was needed. Their training was very good, their training department was fantastic. Yes, so when we first set it up, the trainer that I had coming out with me was brilliant"

Subpostmaster, Hosted service

"I had no specific training on Outreach. I did initially go to a post office branch when I first started, and they went through everything ... but I [learned more] through hands on experience."

Subpostmaster, Hosted service

Aside from training, the other main type of support participants had experienced was via Post Office Ltd.'s helpline, which subpostmasters had often used at various points since starting Outreach provision. This resource was typically used when a problem arose in relation to day-to-day operation of the services, such as faulty equipment or issues with the Horizon operating system. Those that had used the helpline stressed that it took a long time to get through to the correct person, which at times caused them to give up and try to solve the problem themselves. It was also noted that helpline staff were not always equipped to deal with issues specific to Outreach services, and at times did not know what an Outreach service was or what it entailed.

"Their support system needs to be better. When we call in to report an issue or a problem, I don't expect to be left holding on the phone for 20 minutes before I can speak to someone."

Subpostmaster, Mobile service

"If you phone the technical support, they don't know...obviously the equipment they use for the Outreach is different, but nobody has ever heard of it, nobody knows what you're talking about. So, it's like Outreach just doesn't exist really."

Subpostmaster, Hosted service

Aside from the initial training and Post Office Ltd. helpline, there was repeated reference to a lack of contact with, or support from, Post Office Ltd. For some, particularly the more experienced subpostmasters, this lack of support was not an issue, as they were comfortable in their ability to run the service and were happy to simply "get on with it". One participant was more stoic about this perceived absence of support, feeling that the likelihood of receiving it was so low that there was simply "no point worrying about it".

Others were more negative about the lack of contact they had with Post Office Ltd., which had left them feeling unsupported in their role. In particular, those taking on an Outreach service and post office branch together for the first time reported feeling overwhelmed, with a lot to learn on the job and, often, no direct contact at Post Office Ltd. to ask questions or raise concerns to.

Perceived lack of support was further exacerbated when a technical issue arose with Outreach equipment. In the event of equipment breakdown, some subpostmasters reported having to wait long periods of time for a resolution, impacting their ability to deliver the Outreach service and sometimes preventing them from providing Outreach for days at a time.

"What I hate and I cannot stand, is the lack of control when something goes wrong. I mean mechanically with the vehicles, or electronically with the equipment, because that's when it affects my workload...I wish I could have more control over that with more support."

Subpostmaster, Hosted and mobile service

In extreme cases this lack of support had caused participants to feel isolated and stressed, as they were making decisions by themselves and attempting to deal with problems they did not feel equipped to handle; for example, trying to address faulty broadband and equipment that was preventing them from operating the service; or trying to resolve conflicts with suppliers who were charging more money than they should. These feelings of isolation and lack of support were seen as symptomatic of working within a large organisation, and compounded by the absence of a dedicated representative that subpostmasters could turn to whenever problems arose.

"Dealing with the Post Office Ltd. is like dealing with any big business - they have their tentacles in so many different places that they don't give us any support."

Subpostmaster, Partner service

Financial support for Outreach services

Subpostmasters outlined varying levels of financial support from Post Office Ltd. Some received a fixed sum of money to cover their Outreach provision, whilst others reported receiving an hourly rate (either instead of, or in addition to, a fixed sum). What the hourly rate covered was variable, with some receiving this for the hours they provided Outreach to consumers, and others also receiving payment for hours they spent travelling and setting up their Outreach. Some also received commission on sales made at their Outreach service. Critically, the level of financial support received from Post Office Ltd. appeared to vary, both in terms of the nature of provision and the amount provided.

In terms of the costs they incurred, some subpostmasters explained they were able to make additional claims for expenses incurred whilst running the Outreach, including mileage and venue costs. However, others said they were unable to make any such claims for expenses.

There was also inconsistency when it came to experiences of pay increases from Post Office Ltd. Some subpostmasters explained they had recently received a pay review and subsequent increase on the financial support they received for running their Outreach, whilst others expressed concern at the lack of any increase in financial support for a number of years, despite increases in staff wages and fuel costs to their businesses.

"There is a standard fee that we receive for running the outreach services. I've actually had to go back to them and say, 'this is not paying us enough to run these', and they have reviewed it temporarily."

Subpostmaster, Hosted, home and partner service

"We receive payment for the hosted service, however I've now been sub postmaster here for seven and a half years and they have not increased...the minimum wage has gone up, fuel has gone up; everything has gone up and in seven and half years what you get paid by [Post Off Ltd.] has not increased one penny."

Subpostmaster, Hosted service

"There comes a tipping point where it would become non-viable if they continued not to increase the payments for [the Outreach]."

Subpostmaster, Hosted service

The dominant view was that what they received from Post Office Ltd. was not enough to cover all associated running costs and expenses, including: rent on venues; running a vehicle to travel to and from Outreach locations; and paying staff wages. Subpostmasters were therefore reliant on additional income generated through their day-to-day sales.

Reflecting on their overall financial position, subpostmasters did not think that their Outreach services made a profit. Some subpostmasters stressed that their Outreach was providing an essential service for the community, and did not therefore need to be profitable, as long as it remained sustainable. And, for the most part, they felt that the service was sustainable, providing their costs and income remained stable.

However, there was a perception that, should there be any changes in their financial support, such as a reduction in the fixed fee provided by Post Office Ltd., Outreach services would not remain sustainable. Indeed, one subpostmaster had

already had to reduce staff hours and, as such, reduce their Outreach provision, due to the service making a continued loss.

"... none of us really wanted to reduce the hours, you know, because there were [consumers] who wanted mornings and [consumers] who wanted afternoons and clearly we couldn't do both, so...that was quite stressful for all of us, but we have made the decision now. Hopefully if business and our revenue improves, we will review that. But, unless the Post Office put up what they pay us for transactions, I think we would be struggling to do it."

Subpostmaster, Partner service

Additional support required

Reflecting the issues relating to support outlined above, there was a clear appetite for continued, if not increased, financial support from Post Office Ltd. in order to ensure Outreach services were sustainable. In addition to financial support, subpostmasters made a number of suggestions for further assistance that would help them when providing Outreach services to consumers.

It was felt that a designated contact, with responsibility for Outreach services in a local area, would be welcomed. This would provide some reassurance that subpostmasters could contact someone with knowledge of and expertise in Outreach services. In the absence of a named individual, it was suggested that a dedicated helpline could be provided specifically for issues related to Outreach services.

"Even though it's the same computer system, it's a completely different ballgame with an Outreach...I think that there needs to be a dedicated option on the helpline for outreach queries, handled by staff that are trained with Outreach problems."

Subpostmaster, Hosted service

Others said they would prefer more support to be provided online, such as through email or through an online chat function, which would allow a quick response to their questions and avoid need to have to spend time waiting to speak to someone by telephone.

Participants also highlighted a number of more specific areas relating to the operational aspects of Outreach service they would welcome either additional training, or more informal advice, on. These included:

- how to avoid, or resolve, issues with equipment, IT systems, and the Horizons operating system, which would prevent the need for them to attempt contacting Post Office Ltd. when these issues occurred
- more detail on the costs associated with running the Outreach service, to be provided at an early stage, which would help them to more accurately forecast financial performance
- more training or advice on marketing and communications (as outlined on pages 17 and 18)

Aside from support from Post Office Ltd., subpostmasters felt they would benefit from the opportunity to speak to and network with other Outreach providers, who could share advice on practicalities of running the service, including how to use the equipment, how to arrange their schedules and how to communicate about the services.

The future of Outreach services

Future plans

Looking to the future, subpostmasters generally planned to continue operating their Outreach service indefinitely. For example, it was common for participants to say they would keep operating until they retired, or simply “as long as I am able to”. Therefore, in spite of the challenges associated with the delivery of Outreach (as outlined in preceding chapters), these had not caused participants to doubt their future as an Outreach provider.

Participants’ intention to continue operating an Outreach was, in part, linked to their overall sense of satisfaction and enjoyment in providing the service to communities that needed it. However, a more negative, though less common, view was that the Outreach service was part of the contractual obligation of their role as a subpostmasters, so they felt somewhat “stuck” with the service.

Few subpostmasters had plans to develop their Outreach service beyond its current level, mainly because they felt they were already at capacity in terms of the time and resources needed to deliver the service. However, there were some aspirations to develop, such as taking on additional Outreach services that were being opened in other communities, expanding the reach of the Outreach service by adding an additional day, or adding additional locations for a mobile service. Such aspirations were often predicated on the need for extra resources, either in terms staff or additional financial support to cover increases in operating costs.

Sustainability and future demand

While subpostmasters were generally keen to continue operating the service, there were some questions raised about their future sustainability. As noted in the previous chapter in relation to financial support, the future of Outreach services was seen as dependent on having sufficient income, both in terms of number of customers and financial support provided by Post Office Ltd. Were this income to reduce, in some instances this may cause participants to question the future sustainability of the service. One went further, stating that if the financial contribution from Post Office Ltd. did not increase above its current level, then they would be unlikely to continue to provide the service.

“I don't see us as wanting to stop it... but I would have to say that if [Post Office Ltd.] reduced [their financial contribution], then we would have to have some serious conversations as to whether we would continue.”

Subpostmaster, Hosted, home and partner service

“We really need to get more financial support from Post Office [Ltd] for this - if we don't, then there won't be a post office here anymore”

Subpostmaster, Partner service

Reflecting on the future of the service, those subpostmasters approaching retirement age questioned whether or not the service would be sustainable when they stopped working, feeling that their small, rural area would have a shortage of candidates that would be willing to take on the role.

Furthermore, there were mixed views about future demand for Outreach services. On the one hand, it was speculated that there may be increasing need for Outreach services if more post office branches in rural communities were to close. It was even suggested that, in the future, Outreach services may ultimately have a higher number of users than post office branches, as the former would begin to outnumber the latter. As well as overall demand for the service, subpostmasters foresaw an increase in demand for banking services in particular, in light of bank closures in rural communities, causing some to speculate that this would become a focus of post office provision in rural communities.

On the other hand, it was noted that the population in the areas served by Outreach were ageing, and that eventually the use of the services might decline as the core base of older consumers decreased. This sentiment was reinforced by a perception that the types of services provided by Post Office Ltd. would increasingly move online, and that the younger population would be more likely to carry out transactions electronically. As such, subpostmasters saw the future generation of consumers as less reliant on face-to-face post office provision.

However, in general, participants found it hard to predict future demand for their Outreach services, feeling this was dependent on factors beyond their control, such as the availability of other services in their area (e.g. shops and banks) and on wider patterns in consumer behaviour.

"I don't really know [what demand will be like] ...But as long as they need cash, people are still going to use the service. There are no banks, they are all closing, so they will use the post office for depositing their cheque, depositing their cash... I mean it just depends how life changes. I'm sure they will find a new way of doing things, but whether it will involve the post office or not, I don't know. I will just keep an eye on how things go."

Subpostmaster, Hosted service

Conclusion

The principle objective of the research was to provide insight into the challenges faced by subpostmasters in providing an Outreach service; and to gauge what further support subpostmasters required to ensure Outreach services met the needs of consumers and remained sustainable in the future.

All subpostmasters interviewed recognised the importance of delivering Outreach services to consumers and were universally committed to continuing their delivery of such a service. Crucially, subpostmasters also reported providing a level of service that largely met consumer need, based on feedback they had received from those using their service. Nonetheless, subpostmasters highlighted a number of key challenges that could impact Outreach service sustainability, including:

- Highly demanding workloads, in particular for the many subpostmasters who were juggling provision of multiple Outreach services across a large, rural geographic area, while also working in a local branch. In combination with reported difficulties in taking time off, such working conditions pose a risk of subpostmaster 'burnout';
- Unreliable equipment, combined with long waits for repairs, impacted dependable delivery of Outreach services. In particular, issues with the Horizon IT system and internet connectivity could prevent subpostmasters from reliably providing the full range of services from their Outreach;
- Limitations, such as a lack of available funds, meant that subpostmasters were unable to prioritise more formal channels of advertisement, such as adverts in local newspapers, for their services. In addition, there was a perception that advertising via social media was less suitable for their typical consumer, who tended to be elderly;
- Subpostmasters reported feeling unsupported by Post Office Ltd. In particular, those taking on an Outreach service and post office branch for the first time reported feeling overwhelmed. Such perceived lack of support was worsened when technical issues arose, with subpostmasters reporting issues with Post Office Ltd.'s technical support helpline.

Whilst, for the most part, subpostmasters did not raise concerns about the sustainability of their service, some concerns were raised about the extent to which the services were vulnerable to any increase in costs or reduction in income. Therefore, whilst they were currently sustainable, or 'breaking even', changing financial climates and price increases due to inflation could see them edging towards a tipping point that puts the delivery of an Outreach at risk. Clearly, there was a perception amongst subpostmasters that a higher, and more uniform, level of financial support was necessary to prevent this eventuality.

In addition, there were a number of practical areas aside from financial support where increased intervention would be able to support sustainability of Outreach services, including:

- Support with equipment and IT systems, including advice on how to avoid and resolve issues, in order to help them provide a more reliable service to consumers, without the potential for lengthy waits for resolution through Post Office Ltd.'s official helpline;
- More details on the costs associated with running an Outreach service, to assist subpostmasters in measuring and forecasting financial performance, alleviating the potential threat to sustainability caused by financial loss;

- Assistance with marketing and communications, particularly in relation to communicating service provision to consumers, to ensure consumers are aware of their local Outreach service and able to engage with it;
- And, finally, collaboration with informal networks, such as other subpostmasters providing Outreach services, who could share advice on the practicalities of running a service, including how to use the equipment, how to arrange their schedules and how to communicate about their Outreach.

Ciaran Mulholland

Associate director
Ciaran.mulholland@ipsos.com

Diana Bardsley

Senior research executive
Diana.bardsley@ipsos.com

For more information

4 Wemyss Place
Edinburgh
Eh3 6DH
t: +44 ((0)131 220 5699

<https://www.ipsos.com/ipsos-mori/en-uk/ipsos-mori-scotland>

<http://twitter.com/IpsosMORlscot>

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