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Consumer experience of Post Office Outreach services Research project

Ipsos MORI and Involve

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Executive summary

Background and methodology

The Consumer Futures Unit (CFU) of Citizens Advice Scotland embarked on programme of research to trial different deliberative methods for engaging consumers in postal service policy (as well as in water and energy policy, which are covered in separate reports). The specific aspects of postal services which the research focussed on were Post Office Outreach services, delivered as part of Post Office Ltd.'s Network Transformation Programme. These Outreach services are designed to retain access to postal services in remote areas or areas with dispersed populations.

The purpose of the research was twofold:

- To explore which deliberative methods were most effective, and why, at understanding what matters most to Scottish postal consumers.
- Through the use of deliberative methods, establish what aspects of the Post Office Ltd Outreach network are most important to customers in remote and rural areas and why.

The objective of the research was to improve the way in which postal consumers are engaged in policy and strategy decisions, and to influence the development of policy and practice in connection with Outreach services accessed by postal consumers in remote and rural areas. More specifically the research was intended to help the CFU, alongside other stakeholders, to begin developing a consumer-centred monitoring framework that can be used to assess the quality of service offered to rural and remote consumers and track performance year-to-year.

Three different methodologies were trialled in the research:

- Focus groups – to act as a control method against which the added benefits of more deliberative approaches could be assessed.
- Structured dialogues – a flexible deliberative format that, when well designed, prioritises dialogue between participants and is able to deliver evidence of consumer values, preferences and priorities.
- Online deliberations – using Ipsos MORI's sounding board tool to enable rural and remote participants from different parts of Scotland to engage in dialogue and deliberation together.

These fora were all designed to work with mixed groups of users and non-users of Post Office services provided through one or more of the Outreach services. Participants were therefore recruited from, or close to, locations where Post Office Outreach services were offered.

Topic findings

While most participants were regular users of Post Office services, there was generally a low level of awareness of the different Outreach services available. Many of the participants were unaware that their local area was covered by an Outreach service, and found this out for the first time during the fora. This was particularly true in the areas serviced by the Mobile service and the Home service. This suggests there has been a lack of publicity about the services that would let local residents know how these operated.

Perceived relative importance of Post Office services

Post Offices were seen as a vital resource because of the core functions they provided, particularly in the absence of alternatives, such as banks or courier services in some rural areas. Certain services provided by the Post Office were seen as of relatively higher importance than others:

- *Postal services* were consistently seen as the most important of those provided by the Post Office. There were felt to be few other outlets, if any, which provided these services locally, particularly in the most rural locations.
- *Financial services* were also viewed as very important to users of the Post Office, particularly in the most remote, rural communities without easy access to a bank or cash machine.
- *Bill paying* was a service that participants often relied on the Post Office for because there were no other outlets to do so within their community.

Other services were viewed as of relatively lower importance:

- *Government services* such as vehicle licencing, driving licence applications, and passport check and send services were used comparatively rarely by participants, hence the reason they were often regarded as of lower priority.
- *Travel services* were similarly used infrequently and there were alternative services (e.g. other Bureaux de Change) available for which people were prepared to travel a little bit further..
- In most cases, *retail services* were seen as a lower priority service as they were available in many other outlets, such as at supermarkets and other shops, within travel distance.

The perceived importance of the Post Office extended beyond its role as a service provider, to include the social function that it played within the fabric of rural communities.

Principles of a good Post Office Outreach service

Participants identified a range of characteristics that they associated with a good postal service; in particular:

- good customer service from staff - who were expected to be both knowledgeable and friendly. The importance placed on the quality of staff is supported by other research, beyond the postal sector.¹
- reliability of the service, including consistent opening days and times, working technology, and the available of back-up or alternative provision should the service be unavailable.
- practical considerations, including convenient opening times, location, accessibility for those with mobility issues, and the level of privacy afforded for transactions that customers may wish to be discreet about.

These same principles of good service were also seen as important for Outreach services. In terms of the specific Outreach models, various elements were considered particularly important, including:

¹ https://www.ipsos-mori.com/Assets/Docs/Publications/ipsosmorithinks_loyalty_greatexpectations_09-11-16.pdf

- reliability for both the Hosted and Mobile services, in terms of having consistent opening days and times.
- location of the Hosted service, which participants felt should be central and accessible.
- accessibility of the Mobile service, which participants felt should cater as much as possible to those with mobility issues,
- staff, which was seen as particularly important in Hosted services because of the dependence on an individual staff member, and in the Partner service due to the possibility of retail staff carrying out Post Office tasks that they may not have been trained to do.
- privacy when using the Partner service, though it was acknowledged that this was often restricted by the nature of premises in which the service was operating.

Conclusion

The research highlighted the valuable role played by Post Offices in rural communities and clearly identified the most important aspects of service provision for rural consumers, namely the core functions of mail, financial and bill payment services. In addition to these core functions, a consistent theme was the important social role played by Post Offices in rural communities.

Further, clear messages emerged about the importance of good customer service from staff, reliability of the service, and practicalities such as opening times and privacy. These good service principles were seen as important for any postal service, including Outreach services.

While the research highlighted the importance of Post Offices for rural consumers, it was clear from the research that awareness of Outreach services was low. Clearly there is need for stronger communication about the availability of these services, to raise awareness in the communities they are aimed at.

Methodological findings

The CFU's dual purpose in commissioning this research project was to establish the merits of deliberative research for revealing the preferences, motivations and priorities of Scottish postal consumers. Thus, in order to identify what, if any, added value was delivered by taking a specifically deliberative approach (compared to more traditional qualitative research methods)² three different methodological approaches were applied to the same policy question.

In the methodology report each of the methods used is discussed in detail: including its key characteristics, the rationale for choosing it for this project, and a full description of how it was planned and delivered in this case. The success of each

² For the purposes of this research, 'deliberative' methods have been defined as qualitative research methods in which participants are supported to develop informed opinions about a topic through a process of learning, discussion and public reasoning (i.e. deliberation). Deliberative engagements events are therefore those designed to: give sufficient time and space to enable participants to:

- gain new information;
- discuss the implications of this new knowledge in relation to their existing attitudes, values and experiences, and in light of the opinions of others; and
- form a considered view or conclusion, which may (or may not) be different from their original view.

type of fora is then analysed in relation to how effectively it was able to deliver outputs that addressed the policy research question, drawing upon the data generated within each forum, participant evaluations, feedback from facilitators and observers and the research team's professional expertise and understanding of the method.

This analysis showed that:

- The **focus groups** addressed all of the elements required to form a response to the research question. The outputs from the focus groups were also generally consistent with the findings that emerged from the other fora, providing a strong body of baseline evidence for the research. The depth of discussion, and therefore the deeper understanding of consumers reasoning, achieved through the focus groups however was limited.
- The **structured dialogues** provided the greatest level of insight into the reasons behind consumers' priorities and provided clear outputs regarding consumers' expectation of Post Office services. One of the key strengths of this method which enabled this result was the flexibility of the general deliberative format, which allowed a wide range of methods to be used throughout a session to build up the participant's level of involvement in the discussion and gradually increase the demands being placed on them to collaborate on drawing conclusions. The emphasis on creating conditions for dialogue and deliberation in the session plan also contributed to delivering a higher level of consensus regarding the final outcomes than was found in the other fora.
- The **online deliberations**, while allowing for a much more geographically diverse sample of participants to be involved in the discussions than would have been possible using other methods, did not generate the depth of insight into consumer priorities achieved during focus groups or structured dialogues. The online discussions however did provide valuable data for analysis and introduced specific perspectives relevant to very remote communities into the overall understanding of the issues.

Comparative analysis of methods

A comparative analysis was undertaken, designed to determine which of the different deliberative research methods was most effective. To facilitate this evaluative assessment, the CFU established a range of criteria for 'effectiveness' at the outset of the project against which the value of each method could be compared and conclusions drawn. These were:

- a) the suitability of the method to the topic area and the specific policy question;
- b) the accessibility of the consultation to participants;
- c) the method's ability to provide information in accessible and relevant ways regarding the complexities of the sector;
- d) its ability to engage participants with the topic;
- e) its capacity to draw out meaningful dialogue and deliberation;
- f) the quality, depth and complexity of qualitative and, to the extent possible, quantitative data gathered;
- g) delivering outputs that capture consumer insight in ways that are relevant and useful to policy making; and
- h) being replicable and affordable.

Conclusions

As evidenced in the findings section of this report all of the methods used to consult with consumers were able to effectively address the policy research question and provide the CFU with clear insight into of rural communities' priorities, concerns and expectations of service from Post Office Ltd.

The focus groups, structured dialogue and online deliberations also all proved accessible to the demographically diverse participants (in terms of age, gender and working status) that took part, as attested to by their overall levels of satisfaction with their experience. Participants in all of the fora also found the topic engaging and relevant, and thus were able to contribute effectively to the discussion. This was particularly the case in relation to broad priorities for, and expectations of, Post Office services in rural and remote communities. Some, however, were less engaged with discussions about specific options within the Outreach network due to limited personal experience of using these services.

Most of the information that participants needed to address the specific research question came from their own experiences, the experiences of others in the room and their understanding of the needs of their rural communities. However, each of the methods used was also able to provide participants with additional background and contextual information in a way that was both relevant to the needs of the discussion and easy to understand.

There were, however, limits to what could be achieved by using a focus group format, and not simply due to the limited time available for the discussion. Focus groups are traditionally an extractive (rather than deliberative) form of consultation, where participants' individual views are drawn out, albeit in a group context. The discussion structures used in a focus group will therefore generally concentrate on the collation of individual responses and the reactions to the opinions of others. Although an explicitly deliberative component was included in the discussion guide for these focus groups to enable fairer comparison, the outputs produced in these sessions lacked the negotiated quality and purposeful consideration of others' views that was evident in outputs produced in the other fora.

The online deliberations, which each lasted a similar time to the focus groups, produced more reflective and deliberative outputs however, because of the way they were structured and facilitated. In these discussions, participants demonstrated clear evidence of having developed their opinions through hearing about experiences in other areas of the country, and talking to others in their communities between sessions. This method also effectively allowed for a geographically dispersed sample of the population from rural and remote communities, including a number of island communities, to participate in a discussion that would have been logistically prohibitive if the online method had not been used. This also meant that, unlike the face-to-face meetings, the discussions that took place during these fora drew on multiple local experiences and, because of this, the outputs are possibly more able to be generalised as reflecting the experiences and priorities of rural consumers across the country.

The outputs produced through the structured dialogues provided the greatest level of insight into the reasons behind consumers' priorities, due to the emphasis given in the discussion guide to developing dialogue and creating the conditions for deliberation and public reasoning. This drew on one of the key strengths of this method i.e. the ability to incorporate a wide range of discussion techniques and approaches to build up the participants' level of involvement in the topic and gradually increase the demands being placed on them to collaborate in drawing conclusions. While the dialogues, particularly as delivered in this project (over a full day with c.20 participants), demanded significantly more resources than the other types of fora, this additional investment was balanced by the additional depth and quality of the information they provided.

Deliberative methods are usually more expensive to commission than more traditional qualitative consultations. This is not simply because they will usually involve participants in longer discussions, but also because they require more planning

and higher levels of facilitation. Further, the skills needed to plan and facilitate effective deliberative engagement events are more specialised, and therefore contractors will tend to charge more for these services.

When well designed and delivered, however, deliberative formats will deliver a greater depth of insight into consumer preferences and priorities, and give a fuller understanding of the reasons underpinning participants' opinions. This can be particularly valuable when the research question calls for consideration of wider public benefits or an assessment of priorities for service provision on behalf of communities.

This research clearly demonstrated that the structured dialogue method and the online deliberation format delivered added value, compared to the outputs produced by a focus group, although each did so in different ways. Determining which deliberative method was most effective however, will ultimately come down to which aspects of the findings the CFU find most useful for influencing policy and practice in connection with Post Office Outreach services. Further, by providing the CFU with a greater understanding of the types of outputs each method is best able to produce, the research will effectively help inform methodological choices for future engagement with consumers,

1 Introduction

The Consumer Futures Unit (CFU) of Citizens Advice Scotland is committed to taking an evidence-based approach to ensuring that policy and decision making within the regulated industries – energy, post and water – is responsive to the needs and aspirations of consumers. Over recent years the organisation has undertaken a considerable amount of primary research to capture consumers' opinions on key matters of interest. To date, however, much of this research has been undertaken using 'traditional' methods such as polling, surveys, focus groups and in depth interviewing. The CFU is now interested in expanding this repertoire of methods in order to gain a deeper understanding of consumers' preferences, motivations and priorities. In particular, it wishes to establish the merits of deliberative research in its work.

Given there are a range of deliberative methods that could be used to understand what consumers think – and that these tend to be more costly than more traditional quantitative and qualitative approaches – the CFU has identified a need to understand in the first instance:

1. Which deliberative methods are most appropriate to engage the public in their policy context?
2. What additional benefits deliberative research brings over and above a standard focus group?

As a first step towards addressing these questions, the organisation commissioned Involve and Ipsos MORI to undertake a meta-analysis and scoping exercise into deliberative public engagement in the regulated industries. The objectives of this work were to identify what deliberative research had hitherto been conducted in the UK and further afield in the regulated industries; and what, if any, lessons could be drawn for the CFU's own work.

The report of the meta-analysis and scoping exercise³ concluded that, while there were examples of various deliberative methods being used effectively, very often the success of these came down to careful planning, focused objectives, creative process design, nuanced targeting and how well the process was integrated into decision-making structures, rather than the specific method chosen. That said, the report also presented some general observations about the relative suitability of different methods for different purposes; and also identified a number of cross-cutting practical considerations that are key to the success of any deliberative research study; for example, the importance of securing the participation of a representative sample of consumers.

Based on the findings of the report, the CFU embarked on a programme of research to trial different deliberative methods for engaging consumers in energy, post and water policy. It commissioned Involve and Ipsos MORI to undertake the research. This report covers the findings from the post strand of the research only. More information on, and findings from, the energy and water strands can be found in separate, dedicated reports.

³ INCLUDE REFERENCE WHEN REPORT IS PUBLISHED

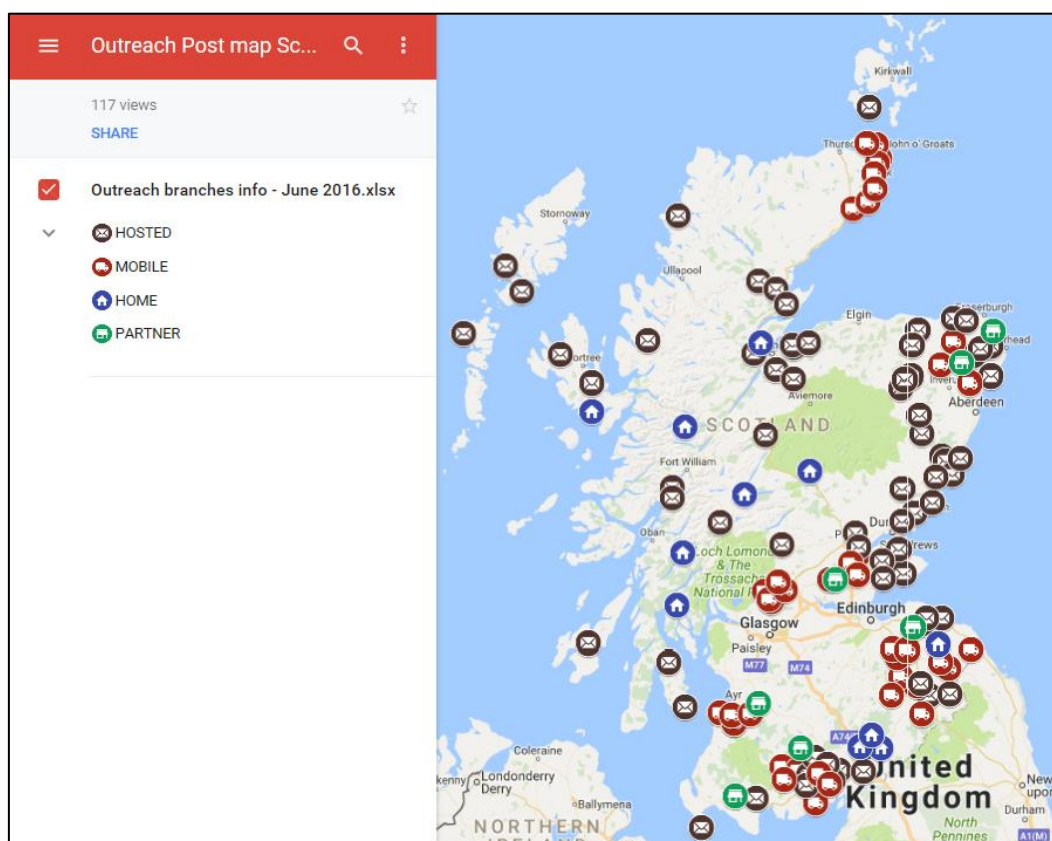
Background to the research

As part of Post Office Ltd.'s Network Transformation Programme, Post Office Outreach services now serve an increased number of communities. There are four such models, designed to retain some access to postal services where "Main" or "Local" Post Office branches are not commercially sustainable:

- The Hosted service sees a core sub-postmaster from the nearest core Local or Main Post Office providing 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 sees the provision of postal services by a local partner in the community (such as a local retailer), supported by Post Office Ltd./the local core sub-postmaster.
- The Mobile service sees the local core sub-postmaster provide postal services from a vehicle that visits the area at set times of day and days of the week.
- The Home service sees the provision of pre-ordered services delivered directly to the consumer's door, or to a community collection point, by the local core sub-postmaster.

All four models are designed to retain access to postal services in remote areas or areas with dispersed populations. The fourth model – the Home service – is only offered to the most isolated consumers. The locations of the models as of June 2016 are highlighted in Figure 1.1 below.

Figure 1.1: Map showing distribution of Outreach services



Purpose and objective of the research

The purpose of the research was twofold:

- To explore which deliberative methods were most effective, and why, at understanding what matters most to Scottish postal consumers
- Through the use of deliberative methods, establish what aspects of the Post Office Ltd Outreach network are most important to customers in remote and rural areas, in relation to access to postal services, and why

The objectives of the research were to improve the way in which postal consumers are engaged in policy and strategy decisions, and to influence the development of policy and practice in connection with Outreach services. More specifically the research was intended to help the CFU, alongside other stakeholders, to begin developing a consumer-centred monitoring framework that can be used to assess the quality of service offered to rural and remote consumers and track performance year-to-year.

Prior to the research commencing, the CFU commissioned a meta-analysis and scoping exercise into public participation in the regulated industries, carried out by Ipsos MORI and Involve. Based on the findings of this scoping exercise, the CFU identified a shortlist of methods deemed most suitable to provide consumer insights into Post Office Outreach services. Subsequently, the CFU invited Ipsos MORI and Involve to select which methods to trial, based on the two organisations' own judgements about which were most appropriate in the context of postal policy research questions and objectives; and what was achievable within the available study budget without compromising quality. The methods chosen were: focus groups (for control purposes); structured dialogues; and online deliberations.

Trial process design

The trial was conducted via two control focus groups, two structured dialogues and three online deliberations, each made up of participants from rural locations in Scotland. Table 1.1 below summarises the timings, scale and duration of each fora.

Table 1.1: summary of trial components

Forum	Date	Location	Duration	Target attendees	Actual attendees
Focus group A	28 February 2017	Peterhead	c2 hours	8	9
Focus group B	1 March 2017	Melrose	c2 hours	8	6
Structured dialogue A	4 March 2017	Peterhead	c6.5 hours	20	18
Structured dialogue B	4 March 2017	Melrose	c6.5 hours	20	18
Online deliberation A	27 February and 2 March 2017	Online	Session 1: c1 hour; Session 2: c1 hour	8	4
Online deliberation B	3 March and 6 March 2017	Online	Session 1: c1 hour; Session 2: c1 hour	8	6
Online deliberation C	3 March and 6 March 2017	Online	Session 1: c1 hour; Session 2: c1 hour	8	10

Recruitment of participants

Participants were recruited from, or close to, locations where Post Office Outreach services were offered. Structured dialogue and focus group participants were recruited from areas surrounding Peterhead and Melrose covered by at least one of the Outreach services. The focus of the three online deliberations corresponded with Outreach services available in the locations concerned – with one deliberation conducted for each of the Hosted, Mobile and Home services.

Participants for the online deliberations were recruited from a range of locations, including island communities, where these Outreach services were offered.

Recruitment of structured dialogue and focus group participants was undertaken by Ipsos MORI's experienced in house team of recruiters, using a face-to-face (door-to-door and in street) free-find approach. Recruitment of the online deliberations was carried out by telephone, using Random Digit Dialling within specified postcode areas (to ensure coverage of relevant remote, dispersed locations).

The recruitment teams were provided with a specially designed screener questionnaire to help them identify eligible participants. Quotas set to ensure a representative pool of consumers in terms of sex, age, working status, social grade, and use of postal services. When designing the screener questionnaire, the aim for each fora was that the majority of participants would be users of one of the Outreach services. In spite of targeting recruitment within areas where these models were provided, it proved extremely difficult to find people who had used, or were aware of, these services. This quota therefore had to be loosened during recruitment and representation from specific Outreach service users was lower than anticipated.

Individuals who worked in market research, media, advertising, journalism, the postal sector or for Citizens Advice Scotland, and those who had attended a group discussion or event in the previous 12 months, were excluded from the research.

To allow for the possibility of some drop out in advance of the fora, an over-recruitment margin of at least 25% was set. In practice, this meant 10 people were recruited to each focus group, 15 to each online group and 25 to each structured dialogue.

All participants received a monetary incentive for taking part in the trial, the level of which was set to reflect the time commitment involved. Focus group and online deliberation participants were given £30 and structured dialogue participants £60.

Discussion guides and facilitation

The fora were structured around discussion guides designed by Involve in conjunction with relevant CFU specialists. The guides were designed to address a common set of themes and questions (as far as possible) whilst being tailored to reflect the varying length and methodological characteristics of the different deliberative fora being trialled. All facilitation of the fora was undertaken by staff from Ipsos MORI and Involve.

Evaluative framework

To assist with the assessment and comparative analysis of the different methodologies, an evaluative framework was established for the project before fieldwork began. It draws evidence from participant evaluations, feedback from observers and facilitators and an interpretive analysis of the effectiveness of the specific process designs in practice. The framework offers an appraisal of the strengths and limitations of each method and provides a comparative analysis of

their deliberative value and usefulness in addressing the research question. A separate assessment of the relative value of each method in relation to the additional consumer preference and reasoning information they provided will also be undertaken. This will be led by an arms-length evaluator.

Interpreting qualitative data

Unlike survey research, qualitative social research does not aim to produce a quantifiable or representative 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.

Deliberative approaches in particular add value because of their ability to gain greater insight into what may lie behind people's opinions. They can also reveal how people's views can develop and change as they are given new information or through discussions with others on an issue. It should be noted, however, that as participants' views are developed through deliberation, the outcomes cannot necessarily be taken to be representative of the views of the wider public who have not experienced the deliberative process.

Acknowledgements

Ipsos MORI and Involve would like to thank the members of the public who gave up their time to take part in the research. We would also like to thank Nina Ballantyne from CFU and Richard Brown from Citizens Advice (England and Wales) for their assistance and input at the design stage.

Structure of the report

The next chapter of the report sets out the thematic findings of the research; namely those aimed at addressing the question: 'What aspects of the Post Office Ltd Outreach network are most important to customers in remote and rural areas, in relation to access to postal services, and why.' Chapter 3 considers the methodological learnings and specifically, which deliberative methods were most effective at understanding what matters most to Scottish postal consumers against a range of criteria.

2 Topic findings: Post Office Outreach services

Awareness and use of Post Office services

Use of Post Office services

Across the different fora most participants were users of Post Office services, though their frequency of use varied, from weekly, to less than once a year. Still, of all structured dialogue participants who completed a survey questionnaire, the majority (61%) said they used Post Office services at least once a month.⁴

Table 2.1: Frequency of Post Office use (among structured dialogue participants)

	Melrose	Peterhead	Total
At least once a week	7	2	9
About once a month	5	8	13
About once every 3 months	5	0	5
About once every 6 months	1	1	2
About once a year	0	4	4
Less often	0	1	1
Base	18	16*	34

* 2 participants in the Peterhead structured dialogue did not respond

Participants identified a number of reasons for using Post Office services in their community. One of the primary reasons was a lack of any alternative services in their area. For example, for many participants from the most rural areas there were no courier services available (or they were particularly expensive) and no local bank in their area, so they relied on the Post Office to perform these functions.

Another theme which strongly emerged across all the fora was the vital social function that Post Offices played within remote and rural community life. Participants often said they used their local Post Office to ensure it remained open, and was not seen as a redundant service within their community. Many were aware of, or had experienced, Post Office closures or relocations within neighbouring communities and felt inconvenienced by this.

"We find it invaluable using the Post Office, we're very glad that we still have one. If when the other people did give the postal service up it would be a 20 mile round trip, to a Post Office if it wasn't there, so I do consider that we're fortunate having a small post office."

(Female online participant)

⁴ This is aligned with previous research by Citizens Advice which reported that '6 in 10 consumers (59%) and small businesses 62%) visit a post office once a month or more often.' Consumer Use of Post Offices (2106)
<https://www.citizensadvice.org.uk/Global/CitizensAdvice/campaigns/Post/Consumer%20Use%20of%20Post%20Offices%20Summary%20Report.pdf>

"We kind of use the Post Office as much as we can to keep it open, because the next village like I say is seven miles away and it's a long way to go for a pint of milk."

(Female online participant)

Use of Outreach services

Users of the Hosted service were represented in the Peterhead focus group and dialogue, and in the online deliberations; users of the Mobile service were represented in the Melrose fora and the online deliberations. None of the participants in any of the fora had used the Home service. Table 2.2 below indicates the extent to which the structured dialogue participants in Melrose and Peterhead used the different Post Office branches and Outreach services available in their respective areas. Most of the participants in the fora had not used the Outreach services. (Full descriptions of the different forms of Outreach services can be found in Appendix A).

Table 2.2: Use of Post Office services (structured dialogue)

Service type used most often	Melrose	Peterhead	Total
Crown Post Office ⁵	0	0	0
Main Post Office ⁶	10	9	19
Local style Post Office Branch ⁷	5	8	13
Outreach service: Mobile	3	0	3
Outreach service: Hosted	0	5	5
Outreach service: Partner	0	0	0
Outreach service: Home	0	0	0
<i>Base</i>	<i>18</i>	<i>18</i>	<i>36</i>

** some participants in the Peterhead structured dialogue gave multiple responses*

There was evident confusion among participants as to the difference between Local style Post Office branches and Partner services, which at times made it difficult to identify which of the services they had used⁸. Many in Peterhead who initially said they used a Local service, later commented that it was actually a Partner service, or vice versa. In other fora, participants recalled using a Post Office that was located within a local shop but were unable to identify whether it was a Local style Post Office branch or a Partner service based on the definitions provided.

⁵ Crown Post Offices – these are usually large branches in town and city centres, which are directly managed by the Post Office and usually located independently.

⁶ Main Post Offices - These branches have dedicated a Post Office counter within another retail premises. They offer customers a full range of Post Office products and services, during standard business hours. They are run by a sub-postmaster. In most cases, they will also provide Post Office service provision at the retail position with most services also available there during the full hours the shop is open.

⁷ Local style Post Office branches – these are located within existing shops and provide a wide range of Post Office services from the retail till. They will usually provide Post Office services during all of their opening hours. As the services are provided by the retail staff however there are some services they cannot provide, for example Passport Check and Send services or some manual bill paying services.

⁸ Information from Post Office Ltd notes that Partner Services are becoming increasingly fewer as most are being transformed into Local style branches.

"We probably have a [Local] style Post office in the local shop, but I don't understand where it says it probably provides the Post Office services from the retail till, because it definitely doesn't; it has its own dedicated till and scales attached to it."

(Female, online participant)

Reasons for not using services

Reasons for low use of Outreach services centred on a general lack of awareness of them, the availability of alternative services and a perceived lack of reliability in the services.

Many participants were unaware that their local area was covered by an Outreach service, and found this out for the first time during the discussions. This was particularly true in the areas serviced by the Mobile service and the Home service. There was seen to be a lack of publicity about the services that would let local residents know how these operated.

"Since our last discussion, I have asked locally around of all the people I know who regularly use [the Post Office] and nobody is aware of the delivery thing at all; not a single person. It isn't advertised in any of the doctors' surgeries or anywhere, nobody knows anything about it, which is quite interesting."

(Female online participant)

"Lots of other people who are housebound or have more difficulty getting out would definitely use [the Home service] in the community, but I don't think anybody knows about it."

(Female online participant)

Among those who *were* aware of the Outreach services, low use of the services reflected the availability of alternative services that were conveniently located. Specifically, many participants were happy to travel to a larger Post Office in a nearby town while visiting other amenities. Also, many used the internet to perform tasks such as passport renewal or banking.

In terms of the perceived lack of reliability of services, participants referred to a range of issues including limited opening hours, reduced services or, in the case of the Mobile service, being in an inconvenient location. Some participants would go to the Post Office while attending to other shopping errands, and having an Outreach service which did not have other amenities close by was seen as a negative.

"I'm as likely to go to the village Post Office as I am to the van, because there are no other amenities where the van stops...it's just a collection of houses which is quite near me, but I have to go to the village anyway if I want to get my newspaper or any shopping or anything like that. So, it's not particularly handy ... very few people use the Mobile service in the area where I live."

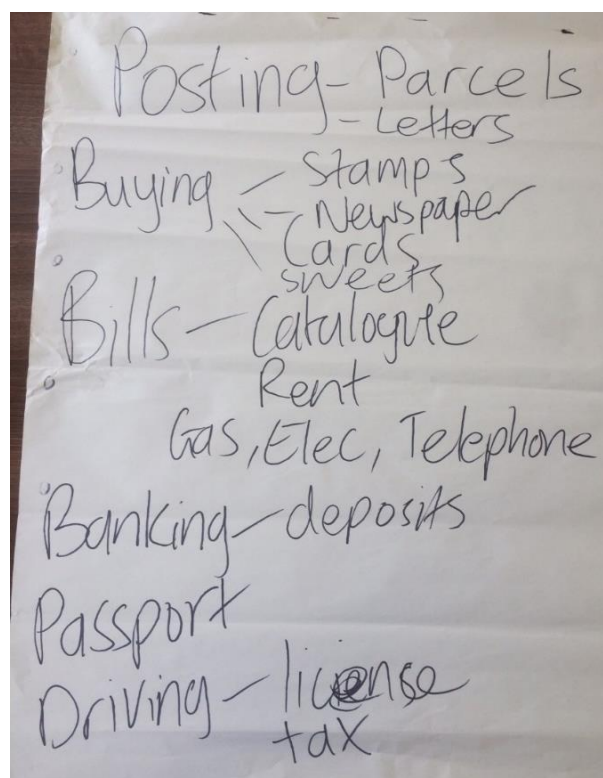
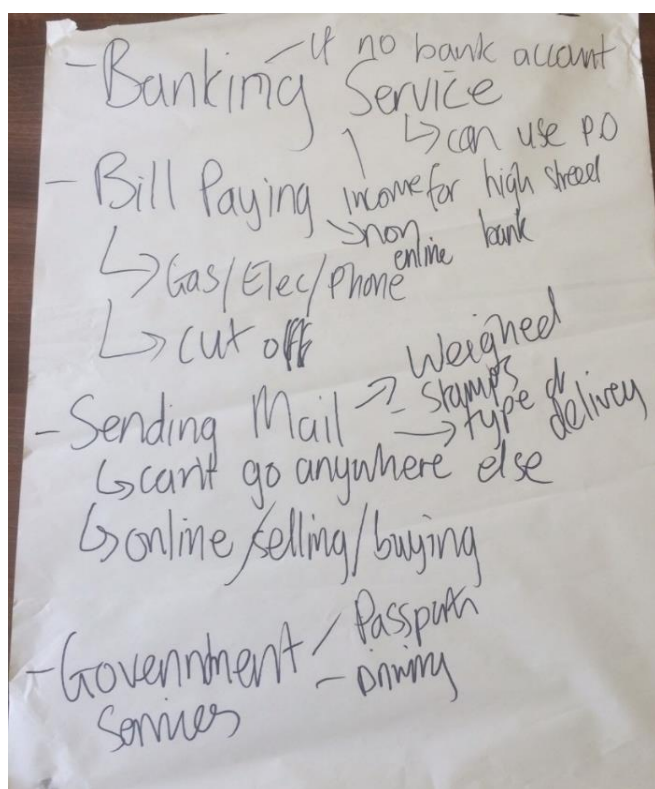
(Female online participant)

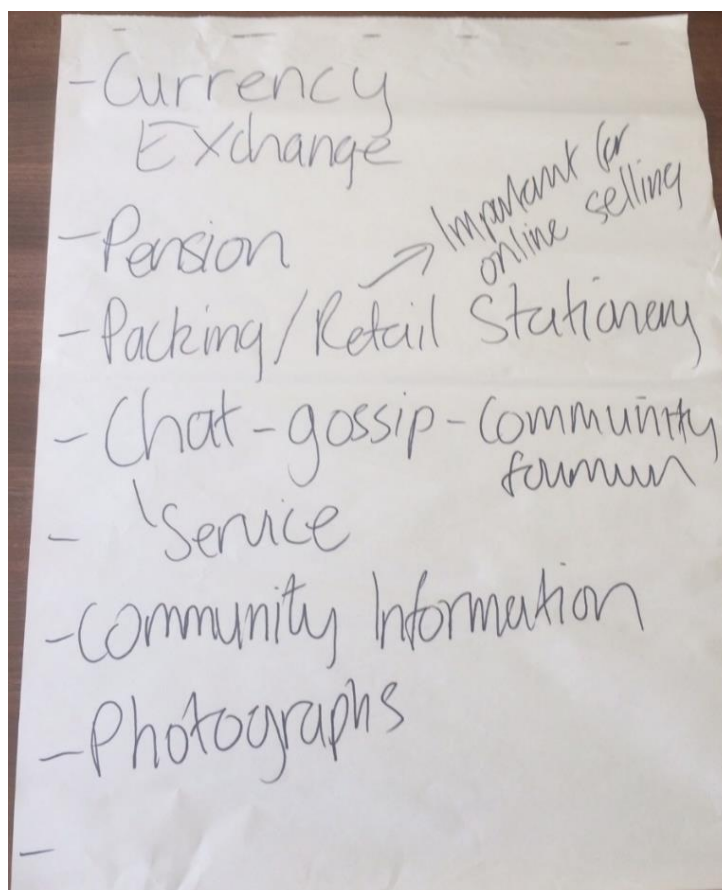
Relative importance of Post Office services

Participants were asked 'Which services they used the Post Office for?'. As the images below help to illustrate, a large range of services were identified. These can be broadly grouped into six service types:

- postal services – including sending and receiving mail and parcels
- financial services – including banking, cash deposits and withdrawals, and money transfers
- bill paying – e.g. utilities, phone, council bills, insurance or income tax
- government services – e.g. vehicle licencing, passport applications, driving licence applications
- retail services, including stamps and stationary etc.
- travel services – e.g. Travel Money Card, Bureau de Change

Figure 2.1: Services used at the Post Office (Melrose structured dialogue)





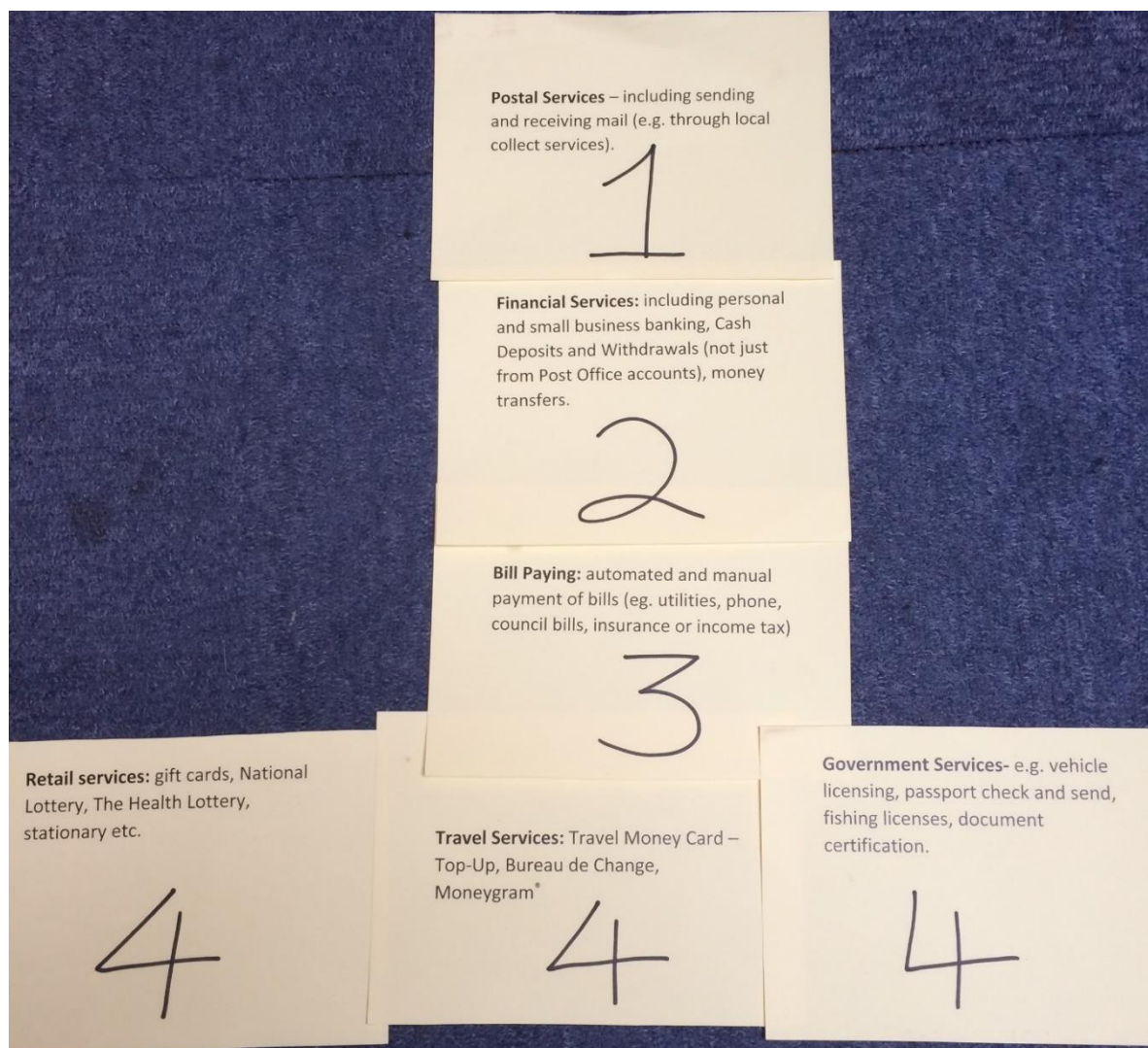
In addition to these services, participants across the fora again spontaneously highlighted the important social function that the Post Office plays within the fabric of rural communities. As discussed earlier, the Post Office was variously described as a place to see familiar faces, a social outlet, a “community forum” or somewhere associated with community spirit.

In the most rural areas the Post Office serves additionally as a place where members of the community could interact with staff and other users to exchange community news, information and gossip. This was seen as a particularly important function for many, and the reason why some people were likely to continue to use the Post Office in their community. This finding was very much in keeping with findings from previous deliberative research into the needs of postal users. For example, in previous research carried out for OFCOM⁹, the social role played by the Post Office – as a place that “connects communities” – was considered particularly important for older people and for those living in remote areas such as rural Scotland.

There were different perspectives on the relative importance of the different type of service in Figure 2.1 depending on frequency of use and the availability of an alternative service providers. However, Figure 2.2 shows, how the importance of different services were ranked in the Peterhead focus group, which was consistent with the top priorities identified in the other fora.

Figure 2.2: Ranking of Post Office Services

⁹ https://www.ofcom.org.uk/data/assets/pdf_file/0015/37410/main.pdf



Highest priority services

Postal services

Postal services were consistently seen as the most important of those the Post Office provided to rural communities, reflecting findings from previous research into postal user needs¹⁰. There were felt to be few other outlets, if any, which provided these services locally, making them of vital importance. This was particularly true in the most rural locations where people would otherwise have to travel many miles to post a parcel, or where courier services were unavailable, or significantly more expensive to use.

"... for returning parcels, couriers don't come up our road, they refuse to come up our road, so again everything we have to do, we have to travel out for."

(Female focus group participant)

"If I want to send a parcel we can't really courier, it's not easy to use the courier, so the Post Office is really the easiest way of sending a large parcel."

¹⁰ https://www.ofcom.org.uk/data/assets/pdf_file/0015/37410/main.pdf

(Male online participant)

Financial services / Banking

Financial services were viewed to be very important to users of the Post Office, particularly in remote, rural communities, particularly if they did not have a bank or the cash machines hosted in other retail services charged for use. In such places, the Post Office was the only resource that people could use to carry out banking transactions, such as withdrawing, depositing or transferring money.

Many participants in less rural areas did not use banking services at the Post Office however because they could do so elsewhere such as at a local bank branch, or increasingly, online, or because they were not aware these services were offered. People who could not use online banking or who felt uncomfortable withdrawing cash from an ATM in the street preferred the security of doing so in person in the Post Office. Further, some participants had experienced the closure of a number of local bank branches. This meant that the Post Office was the nearest place they could access financial services or banking, giving it added importance to rural community life.

"In [my area] we're losing the bank and for elderly people to be able to go into the Post Office and use it rather than use the ATM outside is a big deal for them. Because they have got somebody there who can give them the exact amount of money they want and not just issue tens and twenties that they maybe don't want."

(Male focus group participant)

"In [my area] with the bank shutting and the nearest one being in [another village], being able to bank in the Post Office is such a major benefit, and again I saw a list that showed exactly what banks you could actually have transactions with and I could see that unfortunately the Bank of Scotland still hasn't got that much that you can do in a Post Office, but I would say that the banking is really important now."

(Female focus group participant)

Bill paying

Participants were often reliant on the Post Office to make bill payments because there were no other outlets to do so within their community.

Even those who did not use these services recognised how important they would be to other members of a rural community.

"Manual payments of bills, like your phone, council, I mean a lot of people will go in to the Post Office... I know, people that have heating meters and that type of thing that go and top up their card, I know lots of people like that that do use it for that."

(Female focus group participant)

Lower priority services

Government services

Government services such as vehicle licencing, driving licence applications, and passport check and send services were used comparatively rarely by participants and therefore were often regarded as lower priority services for all Post Office's to provide.

There was also reference to the fact that certain Outreach models did not offer all, or some, of these services, which meant that participants had to go elsewhere to access them. However, they were generally happy to do this, given it was a rare necessity.

Some participants chose to renew their documents online rather than travelling elsewhere to do so. However, even in these instances, they still had to use the Post Office for part of the process and as such saw it as a vital service.

"I just recently renewed my passport, which I will be honest with I did it all online, but on the Monday morning I took all my paperwork and put it in an envelope and just took it all down to the Post Office, sent it away next day delivery... by Thursday I had got my passport back. So, within four days' turnaround for a new passport or a renewed passport, I thought was fantastic, and I think the Post Office played a big, big, part of that."

(Male online participant)

Travel services

Travel services were also regarded as a lower priority for many participants as they were not frequently used and there were alternative services available for which people were prepared to travel. This was particularly true of the Bureau de Change where people were inclined to shop around for the best rate, and then travel to use brokers in a larger town if they provided a better value service. It was also recognised that not all Outreach services would be likely to be practically able to provide this service.

"You can get your travel money in [Marks and Spencer], everybody else does that and they give you a better rate of exchange than the Post Office, so I don't go to the Post Office for my travel money."

(Female focus group participant)

Retail services

In most cases, retail services were seen as a lower priority service as they were available in many other outlets, such as at supermarkets, and other shops within travel distance.

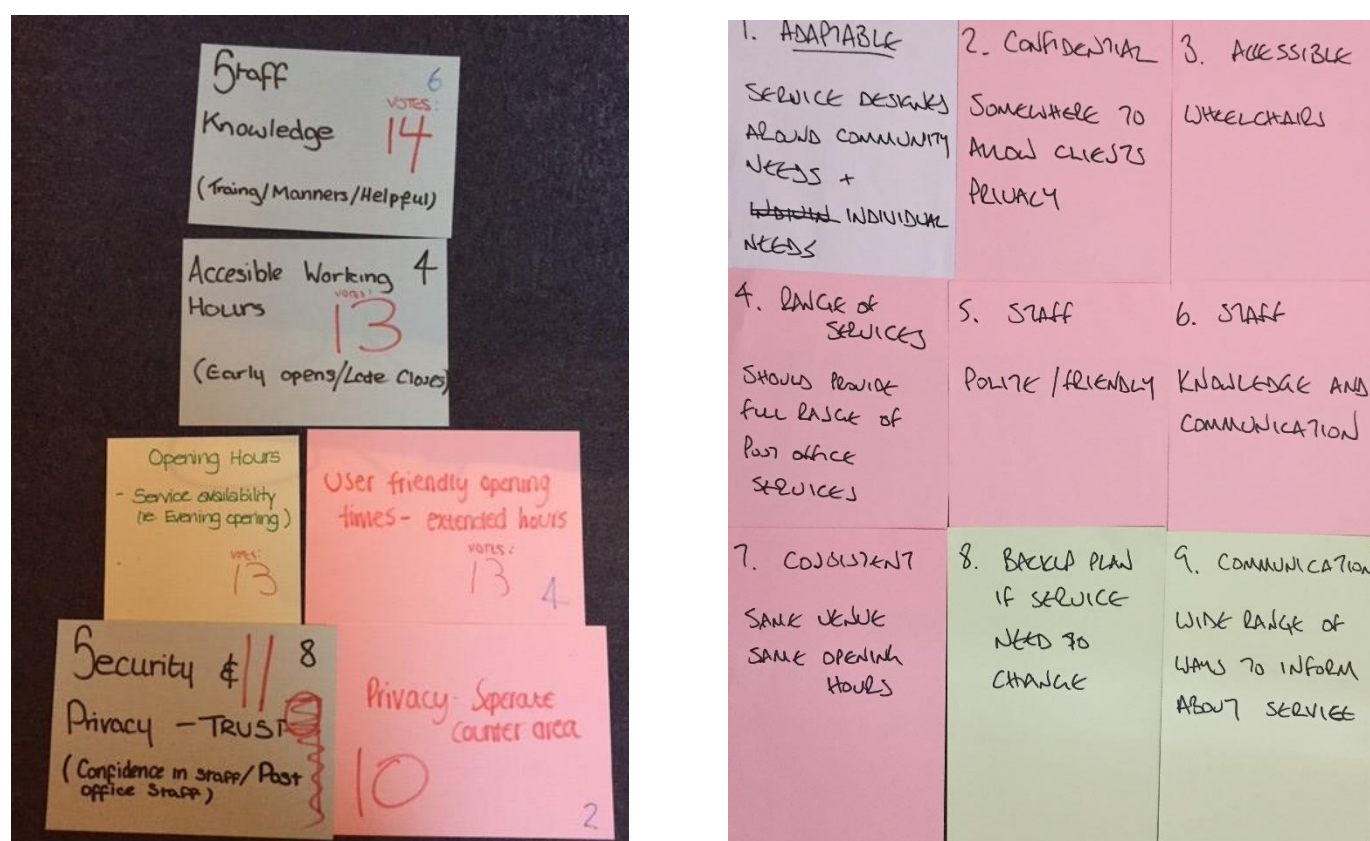
"I would put retail last because I could get my lottery in the supermarket."

(Female focus group participant)

Principles of a good Post Office Outreach service

Participants identified a range of characteristics that they associated with a good Post Office Outreach service. These centred around three key themes: the customer service provided by Post Office staff; the reliability of the service; and practicalities associated with accessing and using Post Office facilities (Figure 2.3).

Figure 2.3: Good service principles suggested by structured dialogue participants



Staff

The importance of good customer service was one of the most prominent themes that emerged across the fora. It was felt that staff should have a good knowledge of the services offered by the Post Office, in order for customers to feel confident in their ability to deal with queries. It was also felt that this knowledge should be consistent regardless of where services are provided - including cases where a Post Office is located within a shop and customers are served by retail staff. It was suggested that such consistency should be achieved through relevant staff training.

"You will feel more secure if you trust the staff member and that they know what they are doing, and this is more likely if it is someone who is specifically trained to do the jobs in the Post Office."

(Male structured dialogue participant)

As well as being knowledgeable, there was a desire for staff to be friendly and helpful: common phrases used to describe expectations from Post Office staff were "polite", "smiling", and "pleasant". It was also suggested that if a staff member was

unable to answer a query, it was important they still made an effort to find information or signpost the customer to another resource.

"I think they need to be somebody who is quite kind and can understand other's needs...not someone who is just delivering a service, but someone you can talk to, have a conversation with...a friend basically."

(Female focus group participant)

"You can know everything, but if your attitude is bad that spoils the service. But, if you have a good attitude and don't know everything, at least you can let people know that the information can be found out somehow."

(Male focus group participant)

The importance placed on the role of staff is supported by other research, beyond the postal sector. For examples, in research¹¹ carried out by Ipsos MORI measuring customer service experiences across a range of sectors, the friendliness and politeness of staff were frequently correlated with a positive service experience overall.

Reliability

Reliability in relation to Post Office services was conceived of in a number of ways. Firstly, participants wanted assurance that their Post Office would open consistently on certain days of the week, at certain times of the day. This was not always the case with some of the services they had used, but was particularly important in rural areas, where customers may have to make a long journey to access the Post Office.

"I know the village is only five miles away, but it has to be a special journey for us to go there to the Post Office and it is really annoying if you go there and it is closed."

(Male online participant)

Participants also wanted to feel assured that the technology and systems used in the Post Office were reliable. In particular, there was a focus on the need for a reliable internet connection, as poor connections had been an issue in some areas, causing systems and transactions to fail. It was acknowledged, however, that the quality of internet connections in rural areas was a wider issue that was beyond the control of the Post Office.

Another element of reliability that emerged was the availability of a back-up or contingency service if the Post Office was unable to open on a particular day. It was suggested that, in some cases, this could be provided through one of the existing models, such as a Mobile or Hosted service. Clear communication of any such contingency arrangements was also seen as an important element of good service provision.

Practicalities

Participants looked for a number of practical elements in considering whether a Post Office provided a good service. Appropriate opening times were considered fundamental. It was common for participants to express frustration that their

¹¹ https://www.ipsos-mori.com/Assets/Docs/Publications/ipsosmorithinks_loyalty_greatexpectations_09-11-16.pdf

Post Office was open at inconvenient times, particularly in areas where opening was limited to select days during the week. It was felt that the opening times should be more accommodating to people who work office hours, and should ideally include evenings or weekends. It was also suggested that the Mobile and Hosted services might be more widely used in some areas if they visited the village outside core working hours on occasions.

"We've just got a few hours. Two days, just a few hours, and sometimes you can go into the Post Office and it's closed. It's also like when she feels like it - sometimes it's [closed] just before half past 11, and she's supposed to be there until 12."

(Female structured dialogue participant)

"If it is that local style of Post Office then they should be offering all of the Post Office's services during the full hours of the operation of the shop, and that's something that people would see as quite useful, particularly if you're working."

(Female online participant)

The location of services was also frequently mentioned. As participants were from rural areas, many were used to travelling some distance for government services provided by the Post Office: for example, vehicle licensing or passport administration. While they were willing to make these journeys for such services, they felt that more regularly used services, such as postal and financial services, should be located closer to their homes.

"Ideally it would be within walking distance, but as much as possible it would be somewhere that people can get to without extra cost or extra time."

(Male structured dialogue participant)

Physical access to and within Post Offices was also highlighted as important. There was specific mention of a need for parking facilities, disabled parking spaces, wheelchair access including ramps and railings, and seating for customers to use if they had to wait in a queue. In some fora, it was suggested that the Post Office needed to make more effort to ensure that the venues that Hosted and/or Partner services were provided from were physically accessible to people with mobility impairments, or with buggies, including having wide and clear aisles internally.

Finally, participants highlighted customer privacy as important, particularly by those who had experience of using services in small spaces where it was easy to see and overhear others' transactions. Indeed, these participants stated that for some services, such as depositing or withdrawing money, they would rather travel to a standalone Post Office than use provision in a local shop.

"When our Post Office changed from being a dedicated sub postmaster in a Post Office on its own there was a loss of privacy. It is now an absolutely horrible little counter in the local grocer shop, and a lot of the older people in particular who are doing financial transactions are very unhappy about it."

(Male online participant)

Participant 1: *"A lot of people in the village will not like other people knowing their business, so will actually go to another Post Office for tasks that they don't want other people to know about."*

Participant 2: *"Maybe postal services should offer an appropriate place they can take you if you have any personal issues that you would rather keep confidential."*

(Male and female structured dialogue participants)

Principles of good service applied to Outreach service models

When asked to consider the principles of a good service for the different Outreach service models specifically, it was generally felt that the same principles of service should apply regardless of the delivery approach. The key themes of good customer service from staff, reliability of service, and practicalities such as opening times and privacy, were all seen as important elements for any Post Office Outreach service. Notwithstanding these consistent themes, certain elements were seen as being of added importance for particular Outreach services, as discussed below.

Hosted service

Participants felt location was an important consideration for the Hosted service and that such provision should be located somewhere as central and as accessible as possible, including for those with mobility issues.

"You should be able to find the location easily and it should be kept as central as possible. And it should be in an appropriate space that allows customers of all needs, including wheelchair users, to access the service."

(Female structured dialogue participant)

Reliability of opening times was also viewed as particularly important for the Hosted service. As the service would not necessarily be linked to a local shop with regular opening times, it was felt that there was a greater risk of the service operating at inconsistent times, at the discretion of the individual running the service. Participants therefore stressed the importance of ensuring the Hosted service was offered at consistent days and times, allowing customers to plan their visits accordingly.

"I think [reliability] would be even more important if you were at a community centre or whatever, because at least if I went to the local one and it was closed I could drive to the next one three or four miles away. But, if you are very rural and that was your only option, and they didn't turn up for whatever reason, I think that would be an issue."

(Female focus group participant)

The quality of staff was also particularly highlighted in reference to the Hosted service. Those who had used the Hosted service in the past had had mixed experiences of customer service, which they felt varied depending on the individual who operated the service. As the Hosted service is typically delivered by one individual, it was stressed that this should be someone who has good customer service skills, is helpful and is knowledgeable.

Mobile service

As with the Hosted service, the reliability of the Mobile service was considered an important aspect of service provision, particularly as it is not based within a fixed location and therefore has the potential to vary in its availability. It was felt that the Mobile service should have consistent opening days and times, and that clear information should be available explaining the locations and timetable for the service. If there were any changes to the timetable, or the van was unable to be there on the day it was supposed to, participants felt that customers should be given plenty of notice of this and be told what the alternative arrangements would be.

"It is important that it is there when it says that it will be, and, if there is any change to the timetable, that we know when that's going to be."

(Female online participant)

As with Post Offices located within buildings, it was felt that the Mobile service vehicles should similarly cater as much as possible for people in wheelchairs or with other mobility issues. Users of the Mobile service noted that the step up into the vans could be difficult for some people, although in most areas the vans do have hydraulically operated steps and ramps. It was suggested that these access arrangements should be applied to all vans to ensure access for all potential users.

While participants acknowledged the range of services provided by the Mobile service was necessarily limited, they suggested that customers should have the option of pre-ordering products they needed, such as Passport application forms.

Privacy was seen as less of an issue for the Mobile service than for the other services, as it was thought unlikely that more than one or two people would be in the van at any one time. Indeed, among users of the Mobile service, the level of privacy it offered was cited spontaneously as a positive feature.

"There's more privacy in the van, in fact more there than we would get standing in the village shop, because the Post Office is an extension of the counter where you pay for the groceries and everybody is sort of standing around and there is a queue behind you. So I don't feel that the van would have any less privacy, in fact it would have probably more than in the village."

(Female online participant)

Partner service

Service aspects that were considered particularly important for the Partner service were staff training, opening times and privacy.

Participants felt that the Partner service may involve shop staff occasionally carrying out Post Office functions that they may not be trained to do; for example during busy periods, outside standard working hours or at other times when the postmaster is unavailable. It was therefore suggested that a consistent level of training should be provided to all staff in Partner service branches, including retail staff who have not necessarily been employed as Post Office workers.

The Partner service was viewed as the model in which opening times could be more flexible than the standard Post Office opening times of nine to five. In some areas with a Local style Post Office branch, examples were given of shop staff carrying out postal services in the evening when the shop was open. It was, therefore, felt that opening times for

the Partner service should correspond with those of the shop in which they were located. The most effective way of deciding opening times, it was suggested, was to reflect the demand for the service within the particular communities in which they were located.

"The village shop could have the Post Office when it opened three mornings a week or whatever is appropriate for the community, the people who live there can dictate that, and therefore they veer away from the rigid structure of the Post Office which is open from nine till six or whatever it is, and then it closes on Wednesday afternoon or Saturday afternoon, etc."

(Female online participant)

In terms of privacy, this was seen as something that had been an issue in the Partner service in the past, and could be improved. It was acknowledged, however, that the level of privacy was often restricted by the nature of premises in which the service was operating.

Home service

As none of the participants had used, or were aware of, the Home service there was limited discussion of this model. The one area that was identified as particularly important for the Home service was security. It was felt that users of the service were more likely to be elderly or housebound people who may be concerned about having a stranger come to their house. There was suggestion that this concern might be lessened if the individual making the delivery was someone from the local area, such as the local sub postmaster.

Communication about the Post Office service

In addition to the principles of good service as described above, a wider point was made across the fora about the need for greater communication about services provided by Post Office Ltd. Reflecting on the low level of awareness of Outreach services operating in their area, participants suggested that stronger promotion of these services in particular was necessary to encourage awareness and use of them. For all Post Office services, including the Outreach models, it was felt that the range of services available should be clearly communicated so that customers are aware of what is and is not available.

"[It is important to] promote the services. Things like posters on the wall advertising what they offer, leaflets...some way of showing the types of services that they are able to offer."

(Male structured dialogue participant)

"Post Offices in rural areas are extremely important, but I had no idea they did so much. So I will certainly be spending a lot of time promoting the services they do to everybody I come across, because I think it is very poorly advertised."

(Female online participant)

The most effective means of communicating about the Post Office services were viewed as leaflet drops to households in the local area, local radio announcements, information in local newsletters or similar publications, and direct communication from Post Office staff, for instance those in a local branch telling customers about any changes to scheduled opening or the availability of particular services.

Conclusion

The research clearly highlighted the valuable role played by Post Offices in rural communities. Post Offices were seen as a vital resource because of the core functions they provided, particularly in the absence of any alternatives, such as banks or courier services.

Certain services provided by the Post Office were seen as of relatively higher importance than others:

- *Postal services* were consistently seen as the most important of those provided by the Post Office. There were felt to be few other outlets, if any, which provided these services locally, particularly in the most rural locations.
- *Financial services* were also viewed as very important to users of the Post Office, particularly in the most remote, rural communities without easy access to a bank or cash machine. In such places, the Post Office was the only resource that people could use to carry out banking transactions, such as withdrawing, depositing or transferring money.
- *Bill paying* was similarly a service that participants often relied on the Post Office to provide because there were no other outlets within their community. Even those who did not use these services recognised how important they would be to other members of their community.

The perceived importance of the Post Office also extended beyond its role as a service provider, to include the social function that it plays within the fabric of rural communities. By providing a place to meet and socialise, Post Offices were seen as inextricably linked with a strong community spirit. The significance that participants placed on the role the Post Office plays in their community's echoes previous research¹² among postal service users. This social role should therefore be acknowledged when considering the aspects of the Post Office Outreach service that are most important to consumers in rural areas.

Looking more closely at specific elements seen to contribute to a good Post Office service, clear messages emerged about the importance of:

- good customer service from staff - who were expected to be both knowledgeable and friendly. The importance placed on the quality of staff is supported by other research, beyond the postal sector¹³.
- reliability of the service, including consistent opening days and times, working technology, and the available of back-up or alternative provision should the service be unavailable.
- practical considerations, including convenient opening times, location, accessibility for those with mobility issues, and the level of privacy afforded for transactions that customers may wish to be discreet about.

In terms of the Outreach services specifically, it is clear that awareness of these services was low, as evidenced by the challenges faced in recruiting users to take part in the research and in the feedback from participants who lived in or close to areas covered by the Outreach services. Clearly, there is need for stronger communication about the availability of

¹² https://www.ofcom.org.uk/__data/assets/pdf_file/0015/37410/main.pdf

¹³ https://www.ipsos-mori.com/Assets/Docs/Publications/ipsosmorithinks_loyalty_greatexpectations_09-11-16.pdf

these services, to raise awareness in the communities that they are aimed at. This was something participants themselves suggested.

In spite of this low level of awareness, participants were clear on the aspects of service delivery that were most important for Post Office Outreach services. These were the same as those identified in relation to postal services more generally, thus good customer service from staff, reliability of service, and practicalities such as opening times and privacy all emerged prominently.

In terms of the specific Outreach models, various elements were considered particularly important, including:

- reliability for both the Hosted and Mobile services, in terms of having consistent opening days and times.
- location of the Hosted service, which participants felt should be central and accessible.
- accessibility of the Mobile service, which participants felt should cater as much as possible to those with mobility issues,
- staff, which was seen as particularly important in Hosted services because of the dependence on an individual staff member, and in the Partner service due to the possibility of retail staff carrying out Post Office tasks that they may not have been trained to do.
- privacy when using the Partner service, though it was acknowledged that this was often restricted by the nature of premises in which the service was operating.

3 Methodology report

The CFU had a dual purpose in commissioning this research project. Alongside gaining a better understanding of what matters most to Scottish postal consumers, their principal purpose was to establish the merits of deliberative research for revealing consumers' preferences, motivations and priorities in relation to policy-making more broadly.

Thus, in order to test the effectiveness of different deliberative research methods, this project applied 3 different methodological approaches to the same policy question; in this case, what aspects of the Post Office Ltd Outreach network are most important to consumers in remote and rural areas, and why?

This methodology report sets out to assess the relative effectiveness of these 3 approaches in order to draw conclusions about:

- the suitability of each of the different methods for addressing this type of policy question;
- how effectively the methods engaged consumers with the subject and were able to identify consumer concerns and priorities for this sector;
- what, if any, added value was delivered by taking a specifically deliberative approach (compared to more traditional qualitative research methods);¹⁴
- how well each method was able to deliver outputs that are useful to, and usable by, policy makers; and
- whether they offer a cost effective and replicable way of engaging consumers with postal issues in the future.

The report begins by providing an overview of the rationale behind the choice of methods and the approach to recruitment and delivery, before discussing each method in detail: describing its key characteristics and how these manifested during the specific workshops on postal Outreach services. The report draws upon the discussion guides prepared for the workshops, participant evaluations¹⁵, facilitator and observer feedback, data generated within the fora, and the team's professional expertise to assess the effectiveness of each method.

Overview of the methods and why they were chosen

At the outset of the project the team from Ipsos MORI and Involve agreed 3 methodological approaches with the CFU that would be used to undertake the consumer research. Each of these were then applied to the same policy research

¹⁴ For the purposes of this research, 'deliberative' methods have been defined as qualitative research methods in which participants are supported to develop informed opinions about a topic through a process of learning, discussion and public reasoning (i.e. deliberation). Deliberative engagements events are therefore those designed to: give sufficient time and space to enable participants to:

- gain new information;
- discuss the implications of this new knowledge in relation to their existing attitudes, values and experiences, and in light of the opinions of others; and
- form a considered view or conclusion, which may (or may not) be different from their original view.

¹⁵ While the report presents quantitative results from the participant evaluations in graph form, these should be taken as illustrative only and, due to the small number involved, not accorded any statistical significance.

question: 'What aspects of the Post Office Ltd Outreach network are most important to consumers in remote and rural areas, in relation to accessing postal services, and why?'. The methods chosen were:

- a) **Focus group** – to act as a control method providing evidence of consumers' opinions on the services provided through the Post Office Ltd Outreach network, and function as a baseline against which the added benefits of using a more deliberative approach could be compared;
- b) **Structured dialogue** – a flexible deliberative format that, when well designed, establishes dialogue between participants and is able to deliver evidence of consumer values, preferences and priorities.
- c) **Online deliberation** – using Ipsos MORI's sounding board tool to enable rural and remote participants from different parts of Scotland to engage in dialogue and deliberation together.

Not only are all of these methods effective and proven ways of engaging with consumers but they are also significantly different enough from each other to allow for critical comparison in a way that will address the CFU's primary research question: which methods are most suited to understanding consumers' preferences, motivations and priorities in relation to postal services?

Fora design and delivery

The fora were all delivered using discussion guides designed by Involve, in liaison with the CFU, using information publically available from the Post Office Ltd. In order to effectively address the policy research question each fora was designed to take participants through a process that:

- Explored their use of Post Office services and what services provided by the Post Office were most important to them;
- Assessed awareness of the Post Office Outreach services;
- Provided information about the different Post Office Outreach services;
- Identified any strengths, weaknesses or concerns participants had regarding the specific models;
- Explored whether important aspects of service provision were missing for those who don't use existing services and any other barriers to use;
- Encouraged them to think about what aspects of the Outreach service provision were most important to them (and their communities) and consider criteria for assessing the relative importance of different aspects of service provision;
- Allowed conclusions to be drawn on what aspects of the Post Office Ltd Outreach network are most important to consumers in remote and rural areas, and why?

While each guide was designed to address a common set of themes and questions (as outlined above) the discussion guides did not simply follow a consistent set of steps and questions for each fora. Instead, the order, approach and degree of focus given to each element varied in relation to the inherent characteristics of each method. Further, to enable a fair comparison between methods, particular attention was paid in the process design to using techniques and formats

that would capitalise on the unique qualities and strengths of each method (rather than simply repeating the same exercise with different groups and for different amounts of time).

The fora were all scheduled outside standard 'office hours' (i.e. during the evenings and weekends) to make them as open as possible to working participants. The venues chosen for the focus groups and structured dialogues were selected to ensure they would be easy to get to for participants: in a central location in each area, with parking available and close to public transport where possible.¹⁶

All of the fora were facilitated by a team of staff from Ipsos MORI and Involve.

Recruitment and participation

The fora were all planned to involve a mixed group of users and non-users of Post Office services provided through one or more of the Outreach services. Participants were therefore recruited from, or close to, locations where Post Office Outreach services were offered.

For the structured dialogues and focus groups participants were recruited from areas surrounding Peterhead and Melrose. The locations chosen were areas where there appeared to be a range of different service models clustered, according to the June 2016 map of Post Office Outreach services locations. As the three online deliberations were designed to each focus on one of the Outreach services - Hosted, Mobile and Home – participants were recruited from different locations where the map identified that these Outreach services were offered, including island communities.

Recruitment for the structured dialogues and focus groups was undertaken using a face-to-face (door-to-door and in street) free-find approach by Ipsos MORI's in house team of recruiters. Recruitment for the online deliberations was carried out by telephone, using Random Digit Dialling within specified postcode areas (to ensure coverage of relevant remote, dispersed locations). Quotas were set to ensure a representative pool of consumers in terms of sex, age, working status, social grade. To allow for the possibility of some drop out in advance of the fora, an over-recruitment margin of at least 25% was set. In practice, this meant 10 people were recruited to each focus group, 15 to each online deliberation and 25 to each structured dialogue.

Table 3.1: summary of recruitment and attendance numbers at the fora

Forum	Location	Number Recruited	Target attendees	Actual attendees
Focus group A	Peterhead	10	8	9
Focus group B	Melrose	10	8	6
Structured dialogue A	Peterhead	25	20	18
Structured dialogue B	Melrose	25	20	18
Online deliberation A – Mobile services	Online	15	8	4
Online deliberation B – Hosted services	Online	15	8	6
Online deliberation C – Home services	Online	15	8	10

As noted above, participants for the workshops were recruited to ensure there was a mix of users and non-users of Post Office services in attendance. The intention in involving non-users was to ascertain whether there were particular barriers

¹⁶ Across these fora 96% of participants agreed that the venue was easy to get to and 88% agreed the venue was suitable for their needs on their post-event evaluation forms.

or issues that made them not use the Post Office or Post Office Outreach services. Inviting a mix of users and non-users to participate in the fora, did however create some difficulties within the discussions. In the fora it became clear very quickly that the reasons for Post Office users not using the Outreach services related, in the majority of cases, to convenience in relation to their own circumstances (e.g. they worked in a larger town and used services there when required). Further, the reasons overwhelmingly given for non-users not using Post Office services were that they had no need for them, rather than any perceived or real access barriers. Therefore, recruiting non-users to the fora made it quite difficult for some people, who had given up their time to attend, to contribute to sections of the discussion. It may also account for 2 participants in the structured dialogue in Peterhead, from an original attendance of 20, leaving the session at the first coffee break, after apparently telling others in the group that they had nothing to add to the conversation as they didn't use the Post Office.

Further, despite targeting recruitment within areas where the Outreach services were provided, it proved extremely difficult to find people who had used, or were aware of, some of the Outreach services. This is, in itself, a useful finding and suggests that there is a general lack of awareness of the range of Outreach services offered by the Post Office. It did however create some difficulties in the workshops, particularly the online deliberations, which were each designed to engage with users of a particular type of Outreach service. One alternative may have been to undertake recruitment differently and focus specifically on users of the services. This could have been by direct approaches on site or possibly by the Post Office operator issuing an invitation to users. Those who expressed interest could then have been invited to participate in the research through a process of selection designed to deliver a representative sample from across the area.

Overall, while the number of participants who were users of the Outreach services was lower than anticipated, the majority used Post Office services regularly and were therefore able to provide insight into the needs of those living in remote and rural communities.

Focus groups

Key characteristics of a focus group

Focus groups are, in essence, guided discussions with a small group of people selected to be a demographic cross section of the population being consulted. They are normally one-off sessions (lasting 1-2 hours) although often several will run in different locations on the same topic.

Focus groups originated in Market Research to test responses to new products or packaging, but are increasingly being used in Social Research to explore public reactions to policy proposals or public services. The principle behind a focus group is that the responses from the small sample can be used to predict the reactions/response of the wider population.

In practice, a group of people (usually between 6 and 15, but typically 8) are brought together with a facilitator who uses a discussion plan to guide the conversation through a number of steps; in most cases beginning with general impression on the topic and becoming more specific as the discussion progresses. When the topic under discussion is unfamiliar to people, or there are complex options to be explored, the facilitator may also introduce written or visual stimuli to inform the discussion.

Throughout a focus group questions will usually be asked to the group as a whole, with the purpose being to stimulate discussion. In this way, focus groups are able to produce insights into opinions that would be less available without the interaction found in a group setting: where listening to others talk about their experiences can stimulate memories, ideas, and opinions from other participants. This is sometimes described as the 'group effect' where group members engage in "a kind of 'chaining' or 'cascading' effect; [where] talk links to, or tumbles out of, the topics and expressions preceding it"¹⁷

Participants

15 participants took part in the focus groups – 6 in Melrose and 9 in Peterhead. They were a diverse and broadly representative group of the local area (Table 3.2), many of whom reported using postal services regularly.

Table 3.2: Profile of focus group participants

	Melrose	Peterhead	Total
Gender			
Male	2	4	6
Female	4	5	9
Age			
18-24	1	1	2
25 - 54	3	4	7
55+	2	4	6
Working Status			
Working	3	7	10
Not Working	3	2	5

¹⁷ Lindlof, T. R., & Taylor, B. C. (2002). *Qualitative Communication Research Methods, 2nd Edition*. Thousand Oaks, CA: Sage

Overview of the focus groups

Two focus groups were held as part of this research project. Each ran for 2 hours on a weekday evening (6:30-8:30pm) and an outline of the session is provided below.

Table 3.3: Session Plan for the focus groups

Time	Title	Type of Activity	Purpose
10 mins	Welcome	Introduction from facilitator	To: <ul style="list-style-type: none"> Introduce the topic and the purpose of the discussion; Allow participants to introduce themselves; Establish how the evening will work.
10 mins	Initial Responses	Facilitated discussion <i>Do you use Post Office Services, and if so, what for? How often?</i>	To: <ul style="list-style-type: none"> Capture participants' patterns of using the Post Office and what they use it for; Allow for short stories about their experiences; Identify any reasons participants may not use Post Office services.
10 mins	Setting the Context	Information presentation (by facilitator)	To: <ul style="list-style-type: none"> Provide information about the Post Office and how it provides services to rural areas; Introduce the 4 different types of Outreach models (Appendix A).
15 mins	Awareness of the Outreach Models	Facilitated discussion	To: <ul style="list-style-type: none"> Assess levels of awareness and use of the different models;
10 mins	Services Provided by the Post Office	Information presentation (by facilitator)	To: <ul style="list-style-type: none"> Highlight the range of different services and types of services provided by the Post Office;
10 mins	Importance of different Services	Prioritisation / Card sorting exercise (using a list of services from the Post Office website)	To: <ul style="list-style-type: none"> Explore which services participants think are most important for the Post Office to provide within local communities; Identify why some services may be considered more important than others.
5 mins		Comfort break	
30 mins	Defining a 'good Post Office Outreach service'	Facilitated discussion	To: <ul style="list-style-type: none"> Identify the factors that participants would use to define a 'good Post Office Outreach service'; Agree what aspects are most important; Identify if there are any factors that are particularly important in rural locations; Assess whether there are different expectations / factors depending on the different delivery models.
10 mins	Closing	Concluding remarks from facilitator	To: <ul style="list-style-type: none"> Clarify how the information gathered during the session will be used; Give participants the option of requesting a copy of the summary report; Ask participants to complete an evaluation of the event to support this section of the report.

As shown in the outline above, over the course of the two hours, approximately 20% of the time was needed for practical matters, including introductions and setting the context of the session. Of the remaining time, approximately 15% was used for providing information to participants about the how rural Post Office services are delivered and the types of services the Post Office provides, and 65% was used for discussion and evidence gathering (although in practice not all of this time was needed).

The design of the session broadly followed a traditional focus group structure, moving from initial responses and discussions about people's patterns of use of Post Office services, through a process of providing wider information, to a more in-depth discussion focussed on priorities for service delivery. An explicitly deliberative component was included towards the end when the group as a whole were asked to rank the importance of different services to rural communities and collectively explore what qualities should define a 'good Post Office Outreach service'.

In both Melrose and Peterhead the initial sections of the focus group worked best: where people were discussing the types of services they used, their satisfaction with these services and the reasons why. It did however become clear through the discussions that most participants appeared to use a Local Style Post Office branch to access these services. While this service model was technically outwith the remit of this research, the discussions did give a clear indication of what services were most valued by people living in these rural communities, and why.

Despite being recruited from areas where Outreach services were in operation few participants at either of the focus groups were aware of the Mobile and Hosted services, even fewer had direct experience of using them, and no one had heard of the Home service. This meant that the section of the discussion devoted to exploring participants' specific experience of using these Outreach services provided minimal outputs.

This also affected the discussions in later part of the session where participants were asked to consider what qualities should define a 'good Post Office Outreach service'. Although participants were able to agree on the most important aspects of service provision - including customer service, reliability and consistency - when it came to applying these qualities and standards to the specific models of service delivery their suggestions were often based on speculative problems. For example, imagining that privacy might be an issue for Hosted services in a busy shop, led to suggestions that pop-up booths or privacy screens could be ideal solutions.

Participants' evaluation of the fora

Overall participants evaluated their experience of taking part in the focus groups very positively – with 100% agreeing, and 47% strongly agreeing that they would take part in something like this again.

It is also worth noting that all of the participants agreed that they enjoyed taking part in the fora, suggesting that the experience of the event, rather than strictly the financial incentive, was a motivating factor in willingness to be involved in discussions like this in the future.

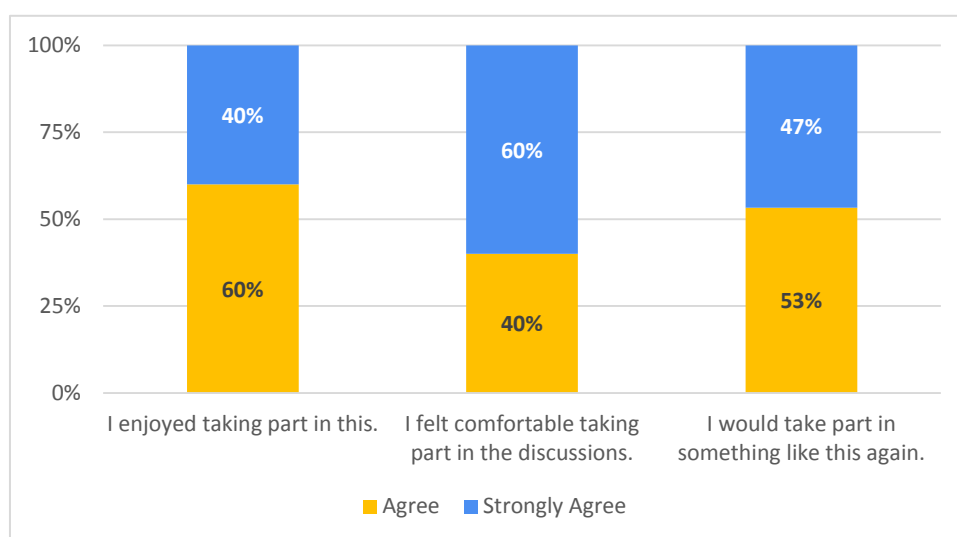


Figure 3.1 Participant evaluation of the overall experience of taking part in a focus group

Source: combined focus group participant evaluation forms (15)

Despite the session not giving a great deal of focus to providing information, other than to clarify the differences between the Outreach service models and present the range of services offered by the Post Office, 94% of participants agreed that they had learnt a lot from taking part.

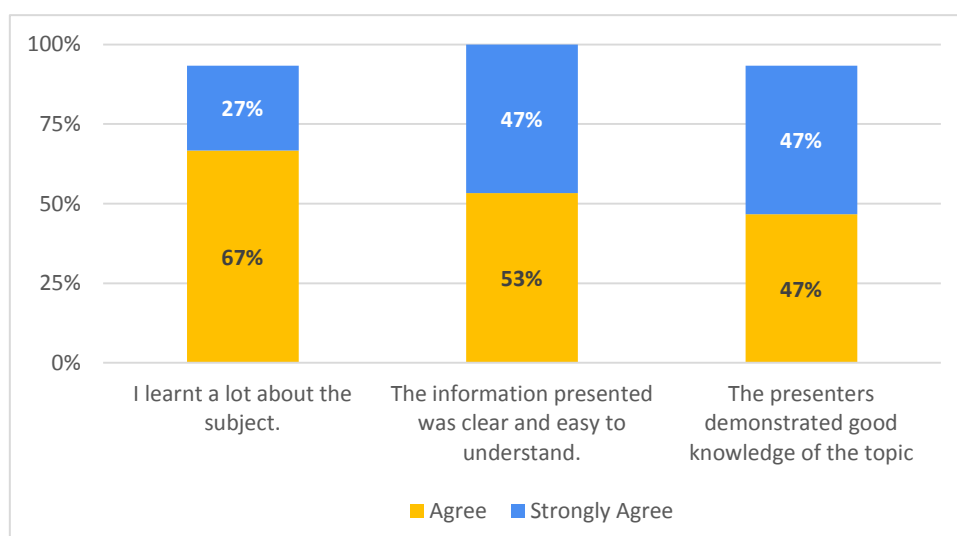


Figure 3.2: Participant evaluation of the information provided in the focus group

Source: combined focus group participant evaluation forms (15)

Comments from the evaluation forms when asked 'What was the best thing about this session?' also emphasised this:

'Learning a lot about the Post Office'

'Learning all the different services provided'

*'Understanding more about what the Post Office offers'**'Learning about the Hosted, Mobile, Partner and Home services – I didn't know they existed'*

Despite some people not having had direct experience of using Outreach services, all participants also reported feeling included in the discussion and able to express their views.

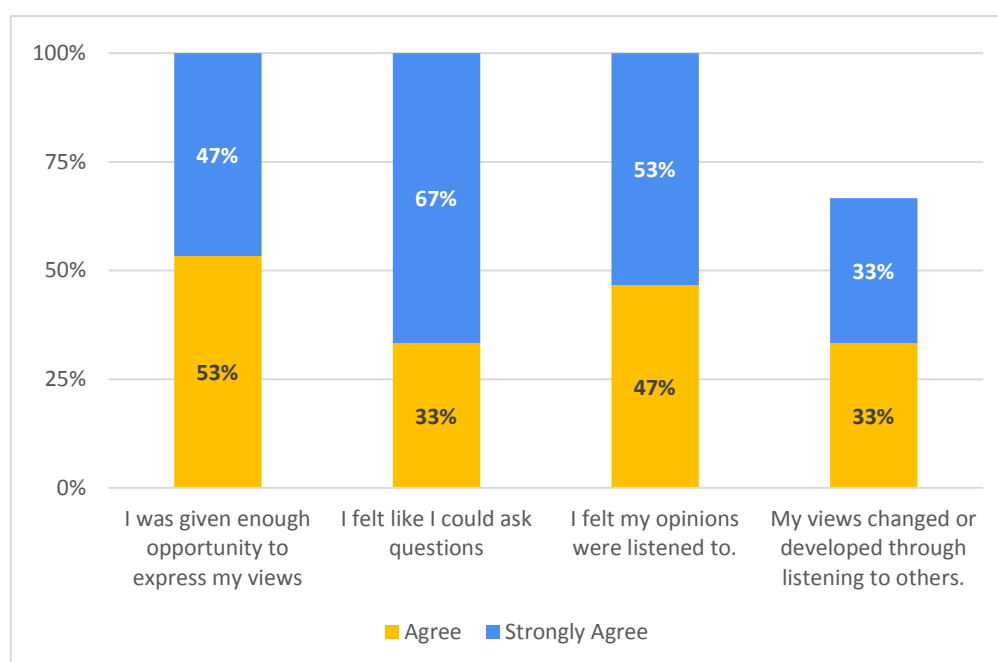


Figure 3.3: Participant evaluation of the experience of participating in the focus group

Source: combined focus group participant evaluation forms (15)

Participants generally seem to have enjoyed *'listening to others and their views'* and *'getting first-hand information on folks' experience in rural areas'*. In fact, the only negative comments received related to the difficulties some participants found in contributing without *'having first-hand experience of some of the services to give to the discussion'*.

Effectiveness of this method in answering the research question

Focus groups are a proven method for gaining insight into consumer preferences and priorities. When well designed and facilitated they can give the client a clear overview of how participants think about an issue and any changes to those opinions that emerge through discussion with others or in response to new information or stimulus material.

In the case of this research question, the focus groups addressed all of the elements required to form a response to the research question – What services were most important to rural consumers and what elements of Outreach service standards were most important to rural communities? The outputs from the focus groups were generally consistent with those emerging from the other fora. As such, they successfully provided baseline evidence that can be analysed alongside the results from the dialogues and online deliberations.

The depth of discussion, and therefore the deeper understanding of consumers' reasoning, however was limited. This was not simply due to the time available but also due to the focus group methodology being primarily an extractive form of

consultation, which concentrates on drawing out individual opinions and responses. The discussion structures used in a focus group tend to concentrate on the collection views, and will not typically challenge participants to question or reflect on their own positions in light of the responses from others. Although an explicitly deliberative component was included in the discussion guide (wherein participants were asked to agree which services are most important for the Post Office to provide to rural communities) this exercise was designed principally to record the individual arguments used to arrive at the decision, rather than to encourage a process of co-creation as would be the case in a more deliberative workshop.

Structured dialogue

Key characteristics of a structured dialogue

A structured dialogue is a specific type of deliberative workshop. Deliberative workshops can best be defined as organised group discussions that give participants an opportunity to consider an issue in depth, challenge each other's opinions, develop views/arguments through a process of public reasoning and reach an informed conclusion (either individually or collectively). Structured dialogues, as the term is used here, are distinct because the activities and techniques used to facilitate the workshop are very strongly structured and designed to deliver clear outputs at each stage. This means they can be repeated, and the results analysed cumulatively, as part of a single engagement process.

Another characteristic of these types of workshops is that they tend to focus explicitly on creating a forum for *dialogue*¹⁸ among a diverse group of people in order to better understand different views and perspectives. Workshops therefore use a range of techniques that help people communicate with each other, and explore their differences, in constructive ways.

While a dialogue on a complex or technical subject will usually require some level of information provision and a process of learning for participants as they process and digest this information, the majority of time in a dialogue should be allocated to discussion, negotiation between participants, and the evaluation of alternatives through public reasoning (i.e. deliberation).

Participants

36 consumers from rural areas took part in a structured dialogue as part of this process – 18 from the area surrounding Peterhead and 18 from the Melrose area.

Table 3.4: Profile of structure dialogue participants

	Melrose	Peterhead	Total
Gender			
Male	4	6	10
Female	14	12	26
Age			
18-24	0	4	4
25 - 54	12	8	20
55+	6	6	12
Working Status			
Working	13	8	21
Not Working	5	10	15

¹⁸ While many will use the term 'dialogue' to refer to any kind of spoken interaction, dialogue should be understood in this context to refer to 'a special type of communicative relationship: the kind of relationship which broadens worldviews, reshapes perspectives and speaks to both our cognitive and mental capacities for mutual engagement'. In this workshop context therefore, dialogue can best be understood as a particular type of communication that is orientated towards building understanding. Effective dialogue is therefore characterised as being collaborative (wherein participants work towards achieving a shared understanding of issues and perspectives), focussed on finding and exploring common ground, and as having the capacity to enlarge, and possibly change, a participant's point of view. Escobar, O. *Public Dialogue and Deliberation*, Edinburgh Beltane, 2011

They were a diverse and representative group from the local area, many of whom reported using postal services regularly. There was however limited participation from people who had used one or more of the Outreach services.

Overview of the dialogue events

The dialogues took place in Melrose and Peterhead simultaneously from 10am – 4pm on a Saturday in March. For the majority of the day the participants worked in small table groups, either with a dedicated facilitator to manage and record the discussion, or with the facilitators moving between groups to offer prompts or re-focus the group as necessary.

As the outline plan for the workshop in the table below demonstrates, of the 4 ½ hours allowed for the workshop (excluding breaks), approximately:

- 10% of time was used for practical and administrative matters;
- 5% of time was used for providing information on about the services provided by the Post Office and the Outreach models;
- 10% of the time was used to gather and record individual responses and patterns of usage;
- 45% of the time was given over to group discussions exploring experiences of using services and ideas for improvement; and
- 30% of the time was allocated for active deliberation and consensus building.

Table 3.5: Session Plan for the structured dialogue

Time	Title	Type of Activity	Purpose
10 mins	Welcome	Introduction from facilitator	To: <ul style="list-style-type: none"> • Introduce the topic and the purpose of the discussion; • Explain a little about how the day would work and what was expected of participants.
15 mins	1st Responses	Un-facilitated table discussions: <i>Do you use the Post Office? And if so what for?</i>	To: <ul style="list-style-type: none"> • Allow participants to introduce themselves at tables; • Begin to get a general sense of the dynamics in the room and participants' patterns of use regarding the Post Office.
10 mins	How we want to work today?	Input from facilitator	To: <ul style="list-style-type: none"> • Explain further how the day would work and what would be expected of participants; • Agree a set of groundrules to help manage the discussions.
5 mins	Setting the Context	Information presentation (by facilitator, with handout)	To: <ul style="list-style-type: none"> • Provide information about the Post Office and how it provides services to rural areas; • Introduce the 4 different types of Outreach models (Appendix A).
10 mins	Awareness of the Outreach Models	Plenary discussion	To: <ul style="list-style-type: none"> • Explore awareness of the different models; • Understand patterns of use within the room of the different models; • Explore general levels of satisfaction when using the different models.

10 mins	Awareness of Post Office services	Information presentation (by facilitator, with handout)	To: <ul style="list-style-type: none"> • Increase participants' awareness of the range of services offered by the Post Office (Appendix B); • Identify which services participants were unaware of and/or surprised were provided by the Post Office.
30 mins	Importance of different Services	Prioritisation / and sorting exercise (using a list of services from the Post Office website) and self-facilitated small group discussion	To: <ul style="list-style-type: none"> • Explore which services participants think are most important for the Post Office to provide within local communities; • Identify why some services may be considered more important than others; • Share the conclusions formed in small groups to achieve an overall consensus about the most important services.
20 mins	Mapping use of different Delivery Models	Interactive survey (over the coffee break)	To: <ul style="list-style-type: none"> • Collect quantitative information on which models of service people have ever used, and which models they use most often.
40 mins	Strengths and Limitations of each Model	Self-facilitated discussion (in up to 4 groups, based on the models people have used):	To: <ul style="list-style-type: none"> • Explore the strengths and limitations of the different provision models; • Encourage participants to think not just about their own needs but the needs of the wider rural communities they are part of; • Identify key themes emerging from the different groups in plenary feedback.
45 mins		Lunch	
60 mins	What Constitutes a 'good Post Office service?'	Carousel exercise: a) <i>Customer Service</i> b) <i>Practicalities (physical access and times, days, privacy, queuing, etc.)</i> c) <i>Reliability (service failure, communication etc.)</i>	Each group rotates around the 3 stations (spending approximately 10 minutes at each) discussing ideas and adding to the notes made by the previous group, before returning back to their original station to consolidate the information in order to: <ul style="list-style-type: none"> • Explore the principles and factors that make a good Post Office service; • To identify 3-5 principles per theme that a 'good Post Office service' should be measured against; • Prioritise these principles overall through an anonymous voting exercise.
10 mins		Comfort break	
40 mins	Service Standards	Facilitated discussion <i>What should these principles mean for service standards in each Outreach models?</i>	To: <ul style="list-style-type: none"> • Apply the principles they have identified to practical models of service delivery; • Identify if there are reasonable differences in expectation for the different delivery models; • Establish what the minimum standards of service that customers should expect across all Post Office Outreach models.
20 mins	Conclusions	Full group plenary:	To: <ul style="list-style-type: none"> • Feedback from the previous discussion; • Seek agreement across the room about priorities and minimum standards; • Allow participants to make any final comments on the issues raised throughout the day.
10 mins	Closing	Concluding remarks	To:

		from facilitator	<ul style="list-style-type: none"> • Clarify how the information gathered during the session will be used; • Give participants the option of requesting a copy of the summary report; • Ask participants to complete an evaluation of the event to support this section of the report.
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Throughout the day a wide range of different methods were used to engage participants with the topic and maintain their interest – small group discussions, full group brainstorming, interactive surveys, prioritising and ranking exercises, informal information presentations and plenary feedback and evaluation.

To ease people into the discussions, and get them used to working in self-facilitated groups the workshops began, not by providing information, but giving participants a chance to take part in a quite unstructured and free-flowing discussion about their own experiences and stories of using Post Office services. While this worked quite well in most of the small groups, it did prove difficult when clusters of non-users (or very occasional users) were seated together. Listening in on these conversations also highlighted to the facilitators at both events that there was a greater proportion of participants with little or no reason to use Outreach services present than expected.

Despite this, in both venues the morning session successfully engaged participants in discussion and produced clear outputs relating to the relative importance of the different services the Post Office provided, and their value to rural communities. However, feedback from some of the facilitators showed that some groups struggled with the self-facilitated tasks. If the events were to be repeated, facilitators suggest that they would benefit from either an additional facilitator, working in two larger groups, or asking each table to appoint a designated spokesperson at the beginning of the activity who would take responsibility for the discussion and for feeding back the outputs.

As the discussions began to focus more explicitly on the Outreach models some of the elements of the discussion guide became more challenging to implement as planned, due to the limited range of Outreach services participants had used. This resulted in the facilitators using their professional discretion to make small adaptations to some of the activities and discussions to respond to the specific needs and experiences of the groups. For example, in Peterhead, the final activity before lunch was adapted to run as two directly facilitated groups: with the first group focussing on what communities needed from Partner services and Local style Post Office branches and the second group addressing the strengths and limitations of 'pop-up' models (i.e. the Hosted and Mobile services). Although this did not enable the level of focussed discussion about the strengths and weaknesses of the different Outreach models that was planned, it did mean that productive discussions regarding the services rural and remote communities require from the Post Office Ltd were able to take place in a way that all participants were able to contribute to.

The carousel activity in the afternoon, by not focussing explicitly on the Outreach services, also allowed participants to effectively identify key principles relating to the service standards consumers expect from Post Office services. While participants genuinely tried to come up with useful ideas and suggestions for improvement when applying these to the specific Outreach services however, many of these relied on addressing speculative problems or responses to particular (potentially very branch specific) issues.

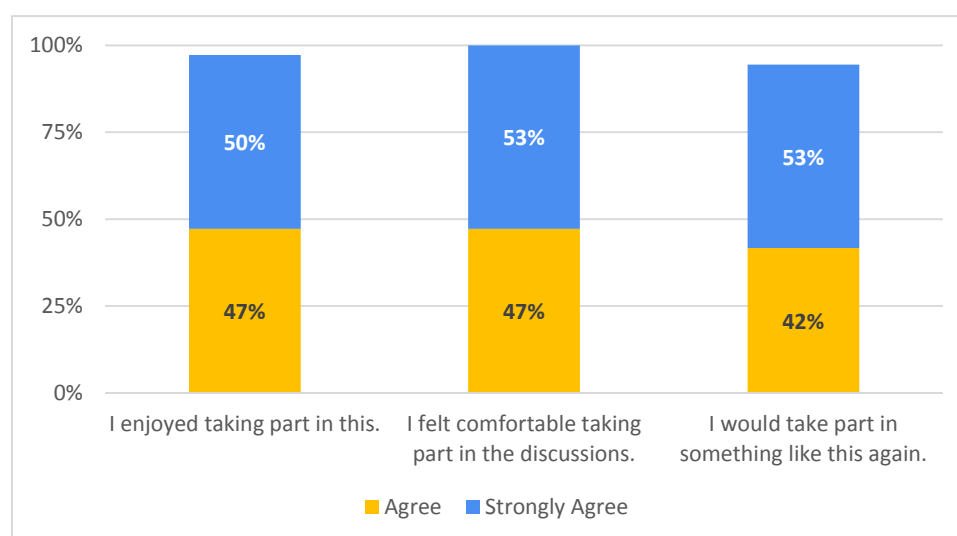
Both of the workshops finished earlier than planned, as it was clear that participants had reached saturation point with the topic. Overall feedback from both facilitators and participants suggests that the workshop could have been delivered in a shorter period, possibly over 4 – 4 ½ hours in total. This was possibly due to the limited experience participants had of

using different models (and therefore the limited range of stories and examples they had to share and draw upon) or possibly, as seemed to come through both of the discussions, because there is a reasonably high degree of satisfaction with Post Office services at present.

Participants' evaluation of the fora

Overall participants responded very positively to the session in their evaluation forms – with almost all participants agreeing that they enjoyed the session, and 50% strongly agreeing.

Figure 3.4: Participant evaluation of the overall experience of taking part in the structured dialogue



Source: Participant evaluation forms from the structured dialogues (36)

'First time doing something of this nature and I enjoyed it'

'It was a surprisingly enjoyable day and I would be happy to attend another'

'I felt this was very informative and really enjoyed my day listening to other people's opinions and the speakers were very interesting and fun'

'Interesting day, I will look at the Post Office in a new light in the future'

As noted in Figure 3.4 above, all participants agreed that they *'felt comfortable taking part in the discussions'* and 95% agreeing they would take part in something like this again. The high levels of satisfaction shown by participants also extends to how they were able to engage with the activities and contribute to the discussions on the day, as illustrated by Figure 3.5 below.

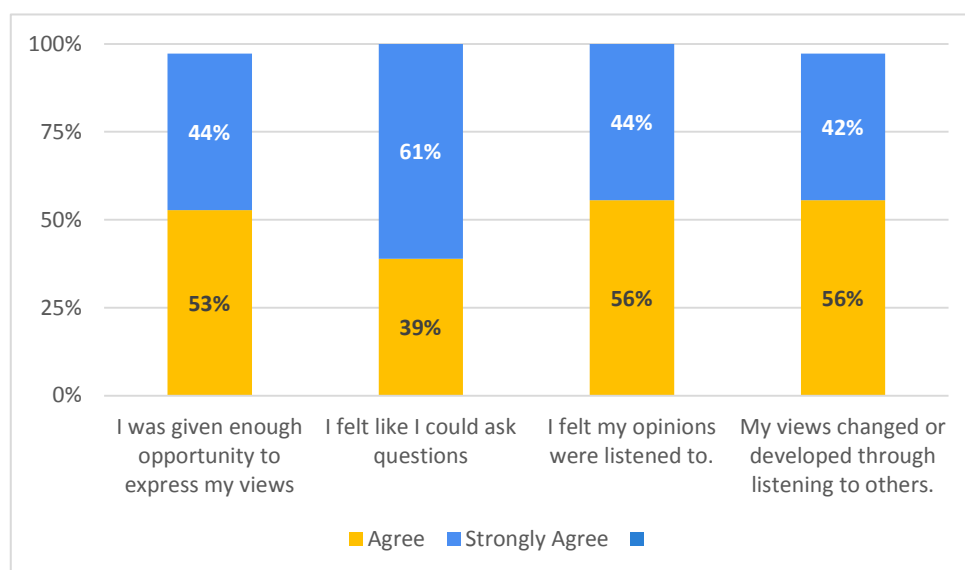


Figure 3.5: Participant evaluation of the experience of participating in the structured dialogues

Source: Participant evaluation forms from the structured dialogues (36)

When asked in the evaluation forms what 'the best thing about the day was...' comments included:

'Meeting a variety of people and feeling like I was getting my opinion listened to'

'The variety of opinions and range of perspectives'

That it 'got our minds going'

'Hearing other people's views /expectations on the subject'

'Good interactive discussions and hopefully our opinions will count'

A further point to note is that 98% of participants felt that their views had changed or developed as a direct result of listening to others, something that is key to a dialogical approach to a topic: wherein participants are encouraged to gain insights from the perspectives of others. This suggests that the workshop effectively created an environment that encouraged participants to listen to each other, develop a greater understanding of different views and refine their own opinions accordingly.

Participants were also very positive about how the day was facilitated with 100% of respondents agreeing that the staff encouraged everyone to contribute to the discussions:

'I enjoyed the day workshop very much and presenters were very good at what they do'

'Excellent group of staff'

'All of the information was clear, concise and informative. [The staff] were great at getting people involved and presenting the information'

Although providing information about the Post Office and Post Office services was not a substantive element of the process design, 97% of participants in the structured dialogues agreed that they *'learnt a lot about the subject'* through taking part.

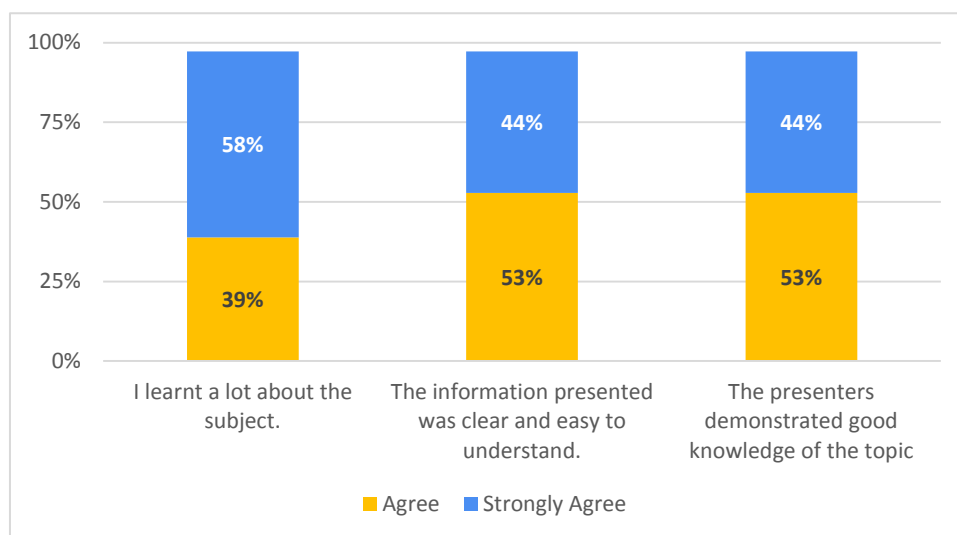


Figure 3.6: Participant evaluation of the information provided in the structured dialogues

Source: Participant evaluation forms from the structured dialogues (36)

In fact, the learning that participants acquired through taking part in the workshop was the thing most commented on in the evaluations forms:

'I learned things about the Post Office I didn't know'

'Very informative, discovered things I was unaware of'

'Finding out more about services I didn't even know existed'

Aside from some comments about the temperature in the venues and the quality of the catering, the only negative responses recorded in the evaluations related to the length of the workshops, with several expressing the view that the session was too long and became repetitive:

'It could have been done in 4 hours as we went over a lot of the same issues'

It was a challenge to... *'find new answers, felt the answers were repetitive within the topics of discussion'*

Effectiveness of this method in answering the research question

The structured dialogue provided the greatest level of insight into the reasons behind consumers' priorities and provided clear outputs regarding consumers' expectation of Post Office services. Overall, the most significant element that these fora added to the analysis was an exploration of the principles of a good Post Office service and the identification of criteria by which Post Office Outreach services could be measured against.

One of the key strengths of this method however is the flexibility of the general deliberative format, which allows a wide range of methods to be used throughout a session to build up the participant's level of involvement in the discussion and gradually increase the demands being placed on them to collaborate on drawing conclusions. While a lot of the discussions took place in small groups, when the workshop design builds in regular opportunities for key points to be fed back in plenary (as the discussion guide did in this case) participants still feel that they are part of a wider process. Feedback throughout the day also means that participants were able to respond to and reflect on ideas that emerged at other groups, which may have differed from the discussion they had been part of. This contributed to a higher level of consensus regarding the final outcomes than was found in the other fora.

Online deliberation

Key Characteristics of this form of online deliberation

An online deliberative forum was chosen as the third method to be used in this research project as it would allow truly remote and rural consumers to be involved without the resources needed to bring the same group together face-to-face.

The Sounding Board technique chosen for these deliberations uses a 'webinar style' meeting platform integrated with a phone conferencing system to engage participants in the deliberations. While participation in this sort of deliberation does require participants to have access to the internet and a phone line, the particular platform does not require them to download any specific software or have any particular computer skills. It also includes a 'raise hand' button which participants can use if they have a question or would like to speak next, allowing everyone equal access to contribute, and a polling facility which can be used vote on options or confirm the agreement of participants.

Participants

Across the 3 online deliberations a total of 18 people from rural and remote areas of Scotland took part. Their home locations are shown on the map in Figure 3.7.



Figure 3.7: Map showing home locations of online deliberation participants

Although participants were recruited from postcodes where a specific type of Outreach service was nominally the most geographically convenient to their home address, very few of the participants had used, or were aware of, the Outreach model that was intended to be the focus of the conversation.

Table 3.6: Profile of online deliberation participants

	Total
Gender	
Male	9
Female	10
Age	
18-24	2
25 - 54	5
55+	12
Working Status	
Working	14
Not Working	5

Despite some early concerns during the planning phase that the online format might be less accessible to older participants it is interesting to note that the participants in these discussions tended to be proportionately older than those who took part in the face-to-face discussions (despite the recruitment process being undertaken using the same demographic criteria). It has been speculated by the recruitment team that, given it is a known factor that people are more likely to not 'turn up' to something that they have agreed to attend by phone rather than in person (hence the higher numbers initially recruited for these discussions), this may be something that younger people are more likely to do.

Overview of the online deliberations

The online fora were specifically designed to allow consumers from different areas, but with access to the same Outreach service model (Mobile, Hosted or Home), to deliberate together. Each deliberation took place in two parts, with a few days between meetings:

- Part 1 (45 mins – 1 hr): This session focused on getting participants comfortable with the technology, providing information about the Outreach model under discussion and gathering initial responses regarding the Post Office services they use, including strengths and weaknesses and levels of satisfaction.
- Part 2 (45 mins – 1 hr): This session concentrated on identifying which aspects of the service provision people valued most, understanding why that was and prioritising areas for improvement.

Each discussion was structured around presentation slides which participants were able to view on screen, alongside a list of participants, a text input screen and a range of reaction buttons (raise hand, agree, disagree, etc.) that they could use to interact with the facilitators and others during the discussion.

Table 3.7: Session Plan for the first online discussion

Time	Title	Type of Activity	Purpose
10 mins	Welcome	Introduction from facilitator	To: <ul style="list-style-type: none"> Introduce the topic and the purpose of the discussion; Ensure everyone was comfortable with the technology; Outline how the sessions were going to work.
10 mins	Participant Introductions	Simple go-round: <i>Who are you and where are you joining us from?</i>	In order, as determined by the list visible to all participants, each participant had up to 1 minute to: <ul style="list-style-type: none"> Introduce themselves and where they were from; Give their first thoughts on the topic for discussion.
5 mins	Fact Finding on use of Post Office services	Polling questions (using voting buttons)	To: <ul style="list-style-type: none"> Establish how often participants used Post Office Services and which services they used most often;
10 mins	Main Services Used	Facilitated Discussion: <i>What are your main reasons for using the Post Office?</i>	To: <ul style="list-style-type: none"> Determine why participants used some services more than others and general levels of satisfaction with these services.
5 mins	Introducing the Outreach services	Information presentation: (by facilitator)	To: <ul style="list-style-type: none"> Outline the range of Outreach service models provided by Post Office Ltd; Introduce which specific model the discussion was focused on (either Mobile, Hosted or Home); Poll participants on their use of and/or awareness of this service delivery model.
10 mins	The Attractions and Barriers to using this Outreach service	Facilitated discussion: <i>What are your main reasons for using or not using this Outreach Service?</i>	To: <ul style="list-style-type: none"> Discuss participants' experiences of using this form of Post Office branch; Identify any common points of concern or satisfaction; Find out what, if anything, may motivate them to use if it they have not already and any barriers to using this service
5 mins	Closing	Concluding remarks from facilitator	To: <ul style="list-style-type: none"> Sum up what was covered in this session Prepare participants for the 2nd session

Between the two sessions, participants were encouraged to read over the re-cap information sent to them and, if they chose to, talk about the ideas raised in the discussion with friends and neighbours in order to gain a wider perspective on the issues.

Table 3.8: Session Plan for the second online discussion

Time	Title	Type of Activity	Purpose
5 mins	Welcome and Check-in	Introduction from facilitator	To: <ul style="list-style-type: none"> Welcome everyone back to the second discussion Check in that there are no problems with the technology
10 mins	Thoughts Since Last Time....	Participant reflections	In order, as determined by the list visible to all participants, each participant had up to 1 minute to: <ul style="list-style-type: none"> Feed in any thoughts they have had about the topic since the group last met.
5 mins	Post Office Services	Information presentation (by facilitator)	To: <ul style="list-style-type: none"> Highlight the range of services provided by Post Office Ltd. Highlight how services are offered through the particular Outreach model.
15 mins	Priorities for Service	Facilitated discussion: <i>Thinking about both your own needs, and the needs of others in your community... of the services available, which are the most important to consumers in remote and rural areas?</i>	To: <ul style="list-style-type: none"> Identify which services are most important to rural and remote communities and why;
20 mins	Other Aspects of Service	Facilitated Discussion: <i>Thinking about both your own needs, and the needs of others in your community... What other aspects of how services are delivered by the Outreach service are most important to ensuring customers receive a good service?</i>	A facilitated exercise to: <ul style="list-style-type: none"> Identify what other aspects of service provision (e.g., customer service, reliability, range of services, privacy, etc.) are most important to customers; To explore how well these aspects of service delivery are / can be accommodated by the Outreach model.
10 mins	Closing	Concluding remarks from facilitator	To: <ul style="list-style-type: none"> Clarify how the information gathered during the session will be used; Give participants the option of requesting a copy of the summary report; Ask participants to complete an evaluation of the event to support this section of the report.

As was the case in the other session plans, most of the time across the two meetings (55%) was allocated for participants to discuss the questions and the issues arising as a group. Overall, this format worked quite well and the participants were able to respond to the prompts, stimuli and points from others in a quite natural discussion format, despite not being in the same room. However, with the largest of the three groups (10 participants), a more structured form of discussion needed to be imposed in order to manage the conversation. This relied much more on go-arounds, hand-up and organised turn taking.

While the discussion management within the online fora worked well, other aspects did not work so well, particularly the focusing of each discussion on a particular Outreach service. Difficulties with recruiting users of these services meant that people who actually used these services were the minority in the discussions planned around the Mobile and Hosted services, and non-existent in the discussion centred on the Home service. Although some participants in the Mobile and Hosted discussions were aware of the services without using them, in the Home discussion no one had ever heard of this type of model.

Given this, the facilitators had to adapt the discussion plans to enable participants to contribute. This meant the discussions that took place were more generally about the needs and priorities relating to Post Office services in rural areas than the specific strengths and limitations of the Outreach services. That said, they did all generate useful findings for analysis and effectively complimented the discussions in the other fora by widening the geographic scope of the discussions.

Participants' evaluation of the Fora

Overall participants reported in their evaluations that they enjoyed taking part in these discussions and 72% strongly agreed that they would take part in something like this again.

'It was good to take part in the discussions and thank you for inviting me.'

'This is the first opportunity I have had to take part in an online group discussion and enjoyed the experience.'

'A very interesting exercise – the first time I have ever been asked for an opinion in any survey. I'd be keen to do it again!'

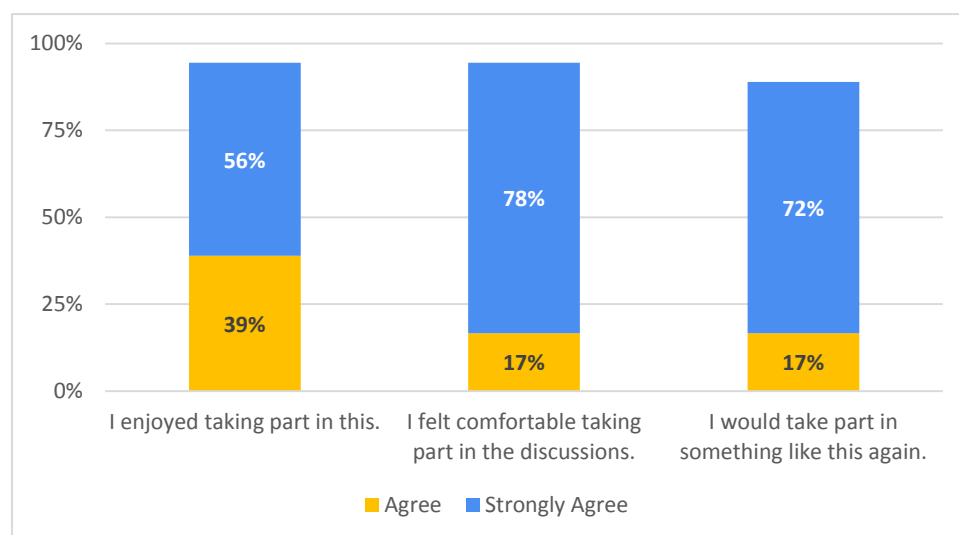


Figure 3.7: Participant evaluation of the overall experience of taking part in an online discussion

Source: Participant evaluation forms (18)

Although there were some concerns in advance that the technology required to participate in the discussions might create a barrier to participation, this did not seem to present a significant problem at the recruitment stage. As one participant

noted, the best thing about the session was *'being able to take part in a meaningful discussion, which will hopefully improve, or at least maintain, local services, from the comfort of my own home.'*

While during the discussions there were a few technology issues faced by some participants, this did not seem to affect the overall quality of the discussion or people's ability to engage. Further most people seemed quite accepting of this:

'Some of the phone lines were intermittently poor making it difficult to hear sometimes'

'The varying volumes of speech from the attendees (some very loud and vibrating the speaker on the phone and some very quiet). This is not a criticism of the attendees and I do not think it would have been easy to overcome, as I suspect it was down to technical issues.'

'Just my own frustration that I was not able to get on line at the beginning of the first session – but I know that was my own computer playing up'

'Even when I lost connection and redialled I was told what I had missed.'

Online, or any other form of remote discussions (e.g. teleconferencing), provide a unique challenge for a facilitator as, when the visual cues typically evident in a conversation are not available, it can become much more difficult to manage the discussion in a way that ensures everyone gets the opportunity to participate. Most participants seemed to be aware of, and sensitive to, this challenge and this resulted in a willingness to take turns speaking in a more structured way than would have been necessary if they were all in the same room. Overall, the discussions in the online fora seemed to flow very well and, despite the more structured format that the method required, it seems that participants generally felt that they were able to contribute effectively to the discussion.

'All attendees were given ample opportunity to express their views'

'The other people on the session mentioned points that I would have brought up but did not need to as they were being discussed as we went around the room'

'It felt relaxed because of being on the phone / computer at home rather than in a physical group.'

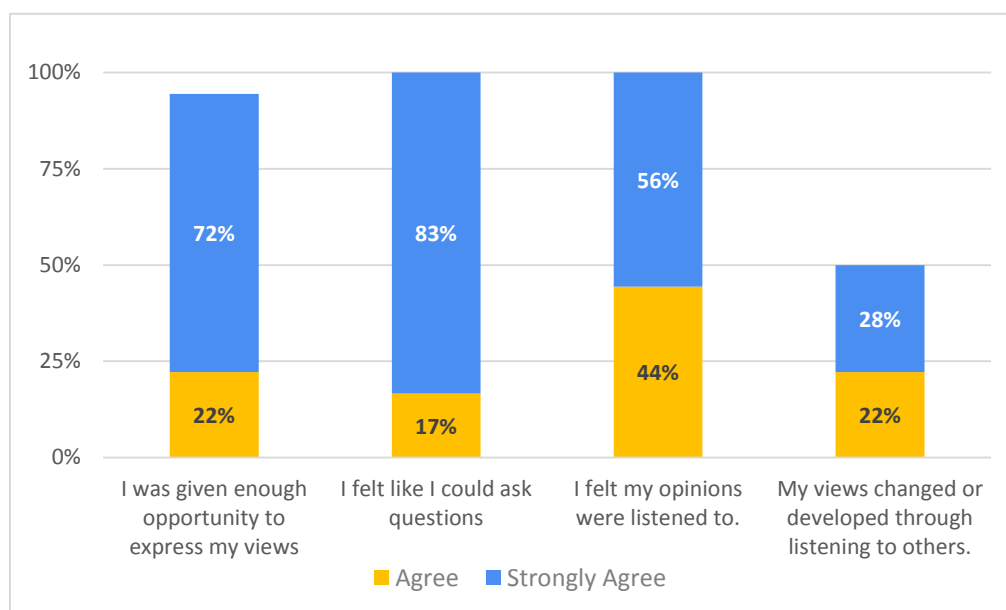


Figure 3.8: Participant evaluation of the experience of participating in the online discussions

Source: Participant evaluation forms (18)

The facilitators were generally very impressed by how well people were able to engage in the deliberations, noting that the general discussions between participants seemed quite natural and responsive. There were however differences in opinions between participants about how effectively dialogue developed during the sessions, as exemplified by the comments below:

'There was not real discussion, just people giving individual observations.'

'Listening to others point of view I became genuinely interested in the subject more than before the discussion'

One of the things that participants seem to have particularly enjoyed and appreciated about the session was the chance to speak to others from different areas and learn about their experiences:

'Hearing about the experiences in other parts of Scotland [made me realise] the service we receive locally is very good and considerate of the need of villagers who live in a rural, remote community'

'I appreciated the need for different style of postal services in isolated areas, I now understand the quality of postal services provided where I live'

'Enjoyed hearing about services around the country and learning how the Post Office has attempted to give a service to very small rural populations.'

It was also interesting to note how much people feel that they learnt from taking part in the discussions, despite the provision of information not being a key feature of the discussion plan. In all of the online fora participants commented in their evaluation that they had appreciated:

'Learning about Post Office services that I would probably never have heard about any other way.'

'Learning about services I did not know existed.'

'Finding out more about the services offered by the Post Office and hearing the opinions of others.'

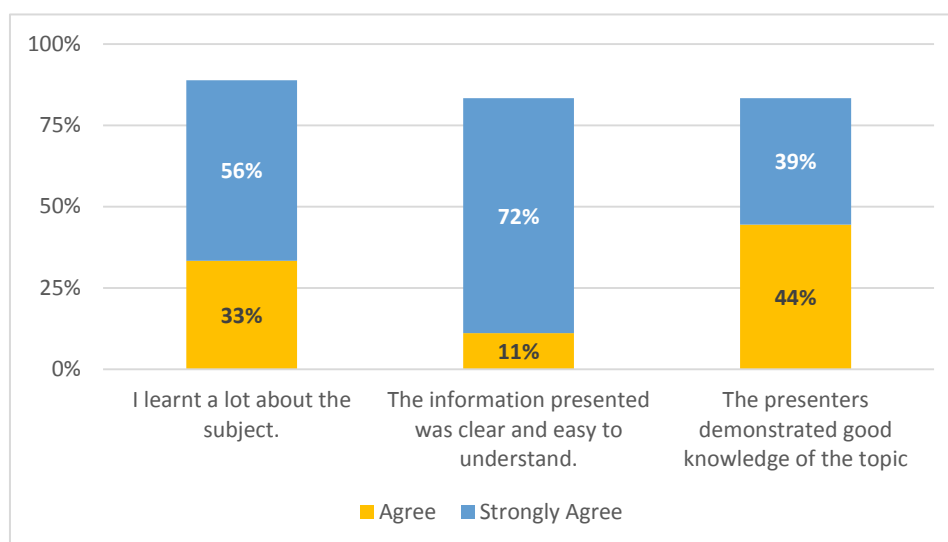


Figure 3.9: Participant evaluation of the information provided during the online discussions

Source: Participant evaluation forms from the online discussions (18)

The mix of spoken and visual presentations used throughout the online fora also seem to have worked very well and a high percentage of participants reported finding this method of presenting information clear and easy to understand.

Effectiveness of this method in answering the research question

This method effectively allowed for a geographically dispersed sample of the population from rural and remote communities, including a number of island communities, to participate in a discussion that would have been logistically prohibitive if the online method had not been used.

While the depth of dialogue and deliberation generated within these short online sessions was lower than that achieved through the focus groups or structured dialogues, the three online discussions all provided valuable data for analysis and introduced specific perspectives relevant to very remote communities into the overall understanding of the issues.

One of the key strengths of the method was that, unlike Melrose and Peterhead, the discussions that took place during these fora were not restricted to a single, local example of service provision. Instead, they were able to draw on the participants' different experiences with branches across the country to compare and contrast strengths and limitations. On this basis, the results are likely to be more representative of the experiences and priorities of rural consumers across the country.

Comparative analysis of methods

This section of the report is designed to bring together some of the findings and observations from the earlier discussions in order to draw some conclusions about the relative effectiveness of the different methods in:

- Providing information in accessible and relevant ways;
- Engaging participants in meaningful and productive discussions;
- Developing dialogue between participants in order to produce a better understanding of what really matters to them, and why;
- Facilitating deliberation and the negotiation of collective responses;
- Producing outputs that are relevant and useful to policy makers; and
- Achieving these goals in a cost effective and replicable manner.

Role of information

When we set out to design these fora the facilitators' role in providing information about the Post Office was not envisioned as a key factor in the process. Instead, the intention was that the participants themselves would be the key source of information – able to share, compare and contrast their own experiences of using different Post Office service and Outreach service models as the basis for informing the discussions. The role we envisioned for specific information was one of clarifying the differences between Outreach service models and grouping the types of services the Post Office provides into manageable categories for discussion and evaluation.

In practice, however the role of the facilitators as information providers became a significant part of each of the fora: due in part to the issues with recruitment, as previously discussed, and in part to the seeming general lack of community awareness about the range of services the Post Office provides and Outreach services specifically. Therefore, participants almost all agreed that they had learnt a lot about the subject by taking part in the fora (see Figure 3.10).

Although the same information about services and the different Outreach models was presented in all of the fora in virtually identical ways, there is however variation in the levels of agreement about how much participants learnt by taking part. This is unlikely to be a reflection of how the information was presented by the facilitators or the time participants spent in discussion together (as both the focus groups and online discussions lasted for up to two hours each). The differences in levels of strong agreement shown between these two shorter fora is instead more likely to relate to the fact that the greater variety of experiences revealed in the online discussions (due to participants' geographic diversity) provided a much greater scope for participants to learn from each other's experiences.

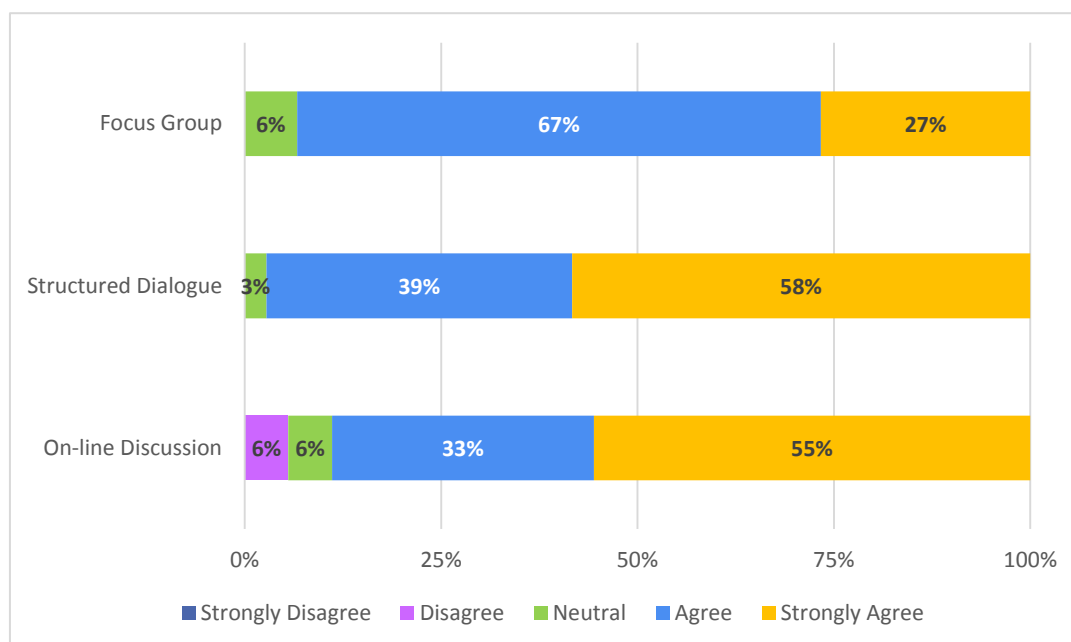


Figure 3.10: Participant response to the statement 'I learnt a lot about the topic'

Source: All participant evaluation forms (69)

Despite the facilitators having no specialised knowledge of the topic, and most forums taking place without the input of an expert advisor, participants were generally very pleased with the level of information they were given. This suggests that it was general lack of awareness, rather than the provision of detailed information, that led to participants feeling they had learnt a lot from taking part.

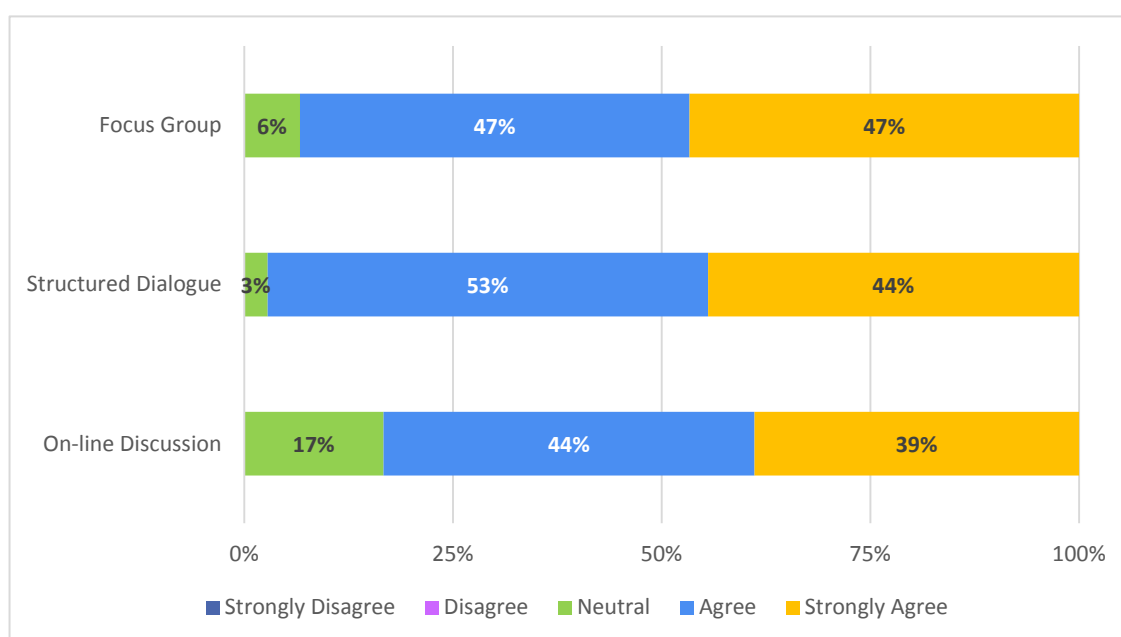


Figure 3.11: Participant response to the statement 'The presenters demonstrated good knowledge of the topic.'

Source: All participant evaluation forms (69)

The participants in the online discussions however show the lowest level of agreement with this statement. This possibly reflects the fact that when specific questions relating to the services offered in a particular local area were asked, the facilitators were unable to provide answers: *'I needed to know a great deal more about the Mobile Post Office service which has just begun in our area but the facilitators had no details.'* This is not surprising given the facilitators' non-expert status (and the genuine difficulty in finding any level of detailed information about services offered by different Outreach models) however, when situations like this do arise, it is understandably frustrating for all concerned.

Role played by participants

All of the fora were introduced to participants using the same simple statement about the purpose of the workshop and how the information would be used.

'The purpose of our discussion today is to explore how well the Post Office is meeting the needs of rural communities.

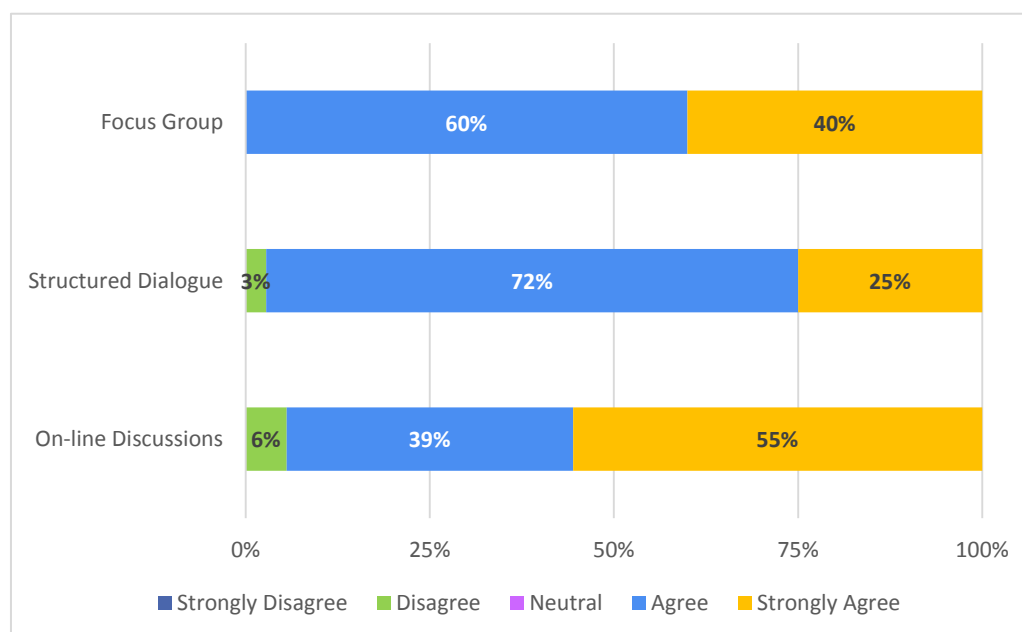
This workshop has been commissioned by Citizens Advice Scotland, who are an organisation that represents customers' and consumers' interests to Government and service providers.

They are using this process to help gather evidence on the needs and experiences of consumers.

Their goal is to establish what aspects of the Post Office service are most important to consumers in remote and rural areas, and why? so they can evaluate whether those needs are being met.'

This appears to have been enough, from the high levels of agreement shown in the evaluation forms, for most participants to feel comfortable that they understood the purpose of the discussions and the role they were being asked to play, as illustrated in Figure 3.12.

Figure 3.12: Participant response to the statement 'I understood the purpose of the workshop and my role.'



Source: All participant evaluation forms (69)

Despite this high levels of agreement, a number of comments indicated that, while their immediate role in the discussions was clear to participants, they were less certain about what the overall process was designed to achieve:

'I still don't really know what the aims and objectives were and was not convinced that anything concrete would emerge from it.'

'I understood my role but not the final purpose'

You should 'provide information prior to the call so we are clear of what it is we are actually taking part in. I was of the understanding it was 'postal services', as in Royal Mail, not the Post Office.'

Unlike many forms of qualitative research, which tend to restrict their enquiry to an individual's personal response to an issue, this research project saw participants asked (either explicitly or implicitly) to play different roles at different stages of the discussions. In the first part of all the sessions they were invited to participate as individuals – giving their personal opinions and reporting on their own experience as Post Office users, the services they used and valued, and their levels of satisfaction with the service they received. This in itself proved difficult enough for some participants, particularly those who rarely used Post Office services, and one of the challenges noted by participants in the evaluations was being *'asked opinions on services I have not used.'*

Later in the discussions, participants were then invited to contribute as representatives of their rural communities, including assessing what services were most important for Post Offices to provide in their areas. In some cases, where participants were able to draw on the needs of specific individuals they knew who used Outreach services or real contextual examples from their villages (e.g. bank branch closures), this worked very well. In other cases participants tended to fall back on the imagined needs of a somewhat dated and stereotypical 'old person' – who didn't use the internet, had no transport and was resistant to change – on which to base their evaluations and recommendations (although much of this has been recognised and tempered in the analysis).

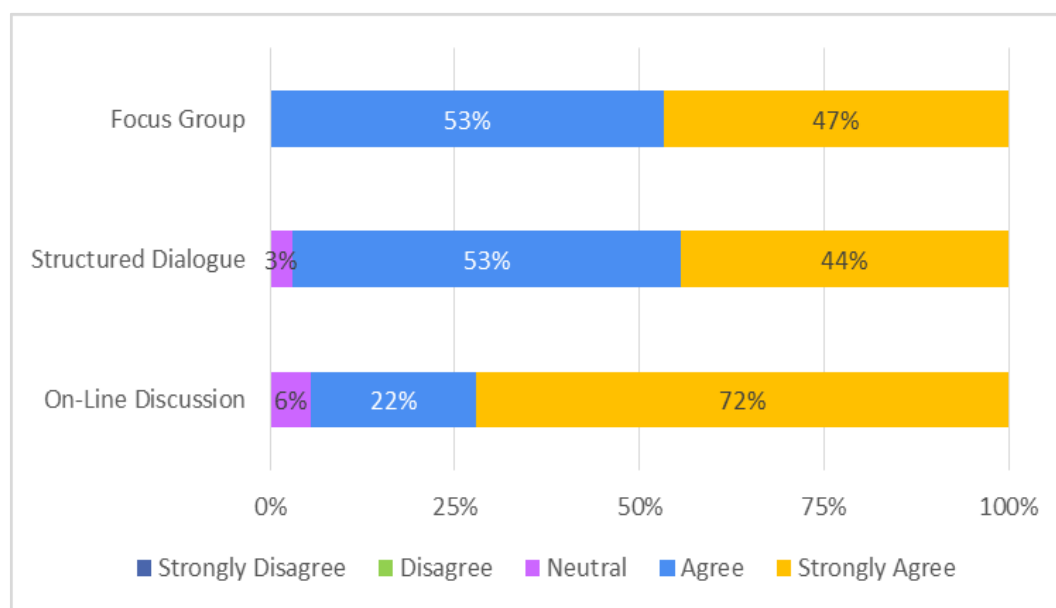
One type of forum where the request to think more widely about the needs of their local community did seem to work particularly well was in the online deliberations. While the first discussions concentrated on hearing from participants as individuals, the break between meetings enabled participants to talk to others in their local areas in advance of the second discussion. In many cases the participants came back to the forum and spoke about the enquiries they had made in their local area. As a result, they were therefore able to contribute more reflective and considered views on the wider needs and priorities of users in their areas.

Impact of dialogue and deliberation

Compared to the focus groups and the online deliberations there is a logical assumption to be made that the additional time given to in-depth discussions in the structured dialogue would have produced more detailed outputs which would provide a better understanding of what really matters to consumers and why. However, given the dual purpose of this research, evaluative elements were built into the process design and evaluation framework, in order to test the simple assumption that *'more time = better results'*.

As part of the evaluation, participants were asked whether they felt they had enough opportunity to express their views throughout the discussion. The results for each forum are compared below.

Figure 3.13: Participant response to the statement 'I was given enough opportunity to express my views.'



Source: All participant evaluation forms (69)

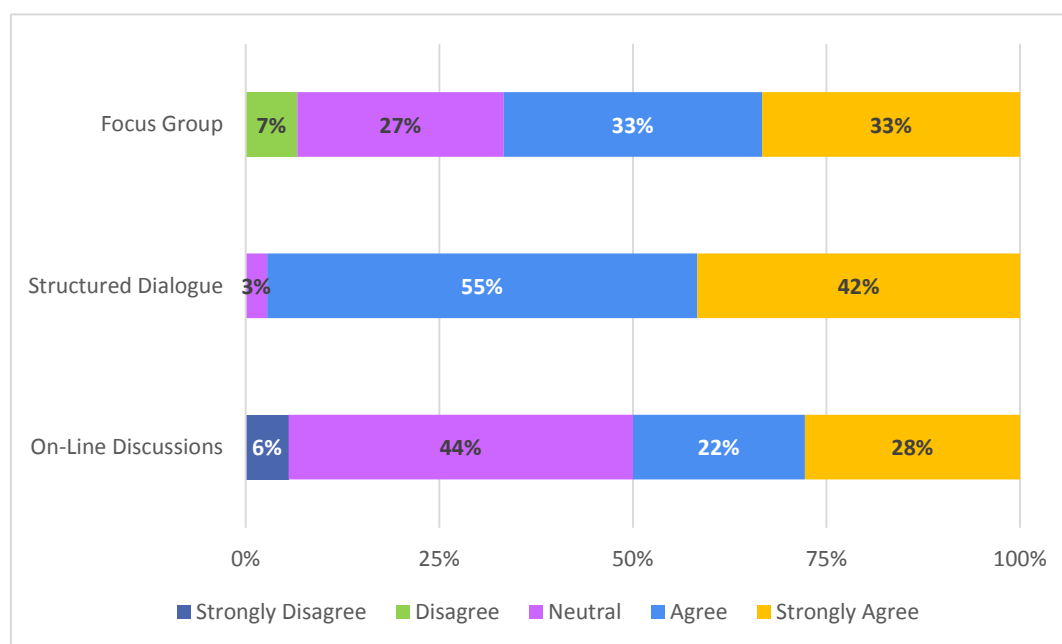
Despite concerns that the online format could make it more difficult for participants to engage in conversation, the evaluations from this group show the highest levels of strong agreement that they had enough opportunity to share their views: *'The quality of the discussion was fairly high. All participants contributed well and were clearly passionate about services in remote rural areas.'*

Although two of the online groups involved only 4-6 participants (which could account for the high level of agreement that they had opportunities to express their views) the proportional response to the question did not noticeably vary when only the responses from the largest group (10 participants) were considered. This suggests that the method itself, rather than the number of participants involved, played a part in ensuring people felt able to contribute: as quoted earlier in this report *'It felt relaxed because of being on the phone / computer at home rather than in a physical group.'* It was also noted in the evaluations forms that having the opportunity to add typed comments to the discussion meant that additional points could be made and recorded without having to interrupt others.

Central to the success of any deliberative process is the space it creates for peer-to-peer dialogue, where participants learn together, gain a greater understanding of each other's perspectives and, in some cases, revise their own views as a result. In their evaluation forms, all participants were asked to reflect on the extent their own views changed (or developed) as a result of listening to others. This generated the most varied responses in the evaluations within each forum, and the comparative results are presented in Figure 3.14.

The structured dialogue, where the principal design focus was on generating in-depth dialogue, shows the highest level of agreement from participants with this statement (and no disagreement). Given the limited time available for participants to interact during the focus groups compared to the dialogues, it is not surprising that these participants expressed lower degrees of agreement in answer to this question. However, it would appear that working with each other in a deliberative way, even in the focus groups, did have an impact on people's initial responses to the topic. For example, the provision of financial and banking services by the Post Office was not an initial priority for many participants, who reasoned that these services were available elsewhere. Once discussions had revealed the particular demands in some rural and remote areas however, the level of importance given to these services was increased.

Figure 3.14: Participant response to the statement 'My views changed or developed through listening to others.'



Source: All participant evaluation forms (59)

While 50% of participants in the online deliberations agreed that their views changed through listening to others this was the lowest percentage reported. Despite spending approximately the same amount of time in discussion with their peers as participants in the focus group, these were the only groups that were not asked to perform a negotiated group deliberation task (e.g. a card ranking or prioritisation exercise), due to technical limitations. This may have contributed to these groups appearing less responsive to the views of others. It is also possible that the sense of anonymity caused by not being in the same location meant that people did not actively engage with each other in the same way during the discussion. Unlike the evaluations from the other methods, where one of the things mentioned most was that people appreciated hearing other perspectives, this did not feature anywhere near as strongly in the comments from the online groups. One participant made this point very clearly in their evaluation, highlighting that these types of forums do not necessarily suit all people.

'There was nothing to be gained from listening to other people's experiences because, although they might be of interest to the survey instigator, they are only of peripheral interest to the other participants whose own experiences are of paramount interest to themselves.'

Capturing consumer insights

As demonstrated in the section of the report covering the findings from this research project, the seven events have cumulatively provided substantial and detailed evidence to the CFU of rural consumers' priorities, concerns and expectations of service from Post Office Ltd. Further, the results were broadly consistent across all of the fora, providing a convincing argument for the effectiveness of all of the methods.

Each of the fora was designed to take participants on a collective journey, from reporting on their own experiences of using Post Office services, through considerations of which services were most important to them and their communities, to thinking about the service standards they expect from the Post Office and how this can be realised through the

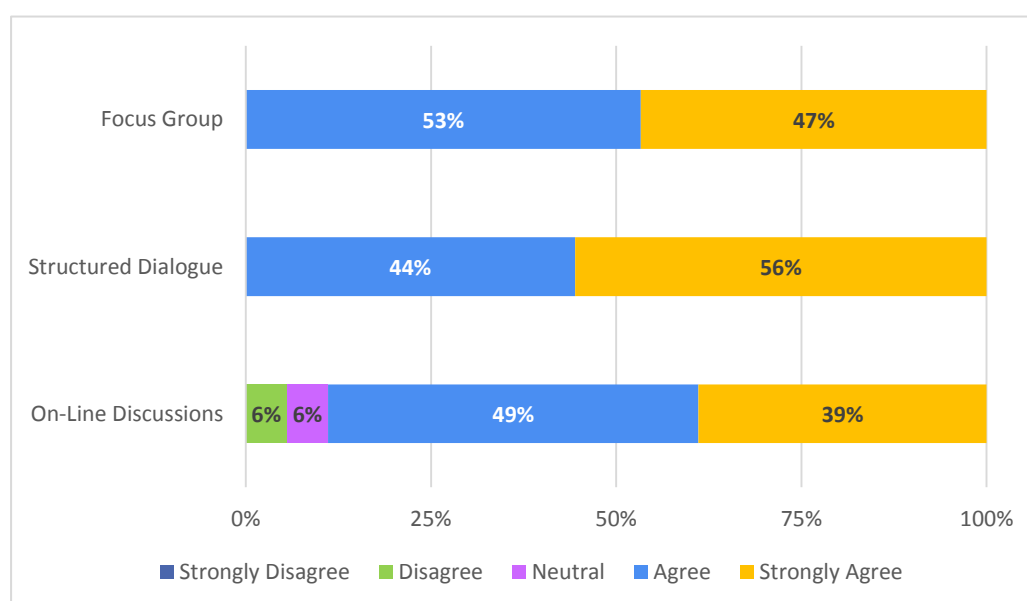
Outreach network. In order to enable participants to contribute in a meaningful way to these discussions, part of each fora was spent providing participants with information about the different Outreach models and clarifying the range of services Post Office Ltd. provides.

While in each fora there were some techniques used to produce direct outputs from the group (e.g. group surveys, card ranking / prioritisation exercises, or the identification of principles for 'good' service), the majority of the evidence used to inform this report has been taken from the notes and recordings made during small group and plenary discussions. It is therefore in the analysis of these outputs that key themes have been identified and consolidated by the research team in response to the overall research question.

The fora were all able to provide a good understanding of the needs and priorities of rural consumers. Looking back at the evidence from each type of forum it is clear that the focus groups, within a two hour period, were able to produce a clear prioritisation of the services most valued by rural consumers, and headline points about consumers' expectations of service provision, including customer service standards.

In the online fora, while there were initial concerns about the depth of dialogue that this format could deliver, participants were generally very engaged in the conversations. Many also seemed to particularly appreciate the opportunity to contribute to the consultation - this '*was a change for the rural areas to be asked their opinions – we are too often just imposed on by providers of services*' – and as a result, seemed to take their role particularly seriously. Further, the value of enabling participants from a range of rural and remote locations to participate (and more importantly, participate in the same discussion) should not be underestimated. Unlike the location specific fora, these discussions were able to draw upon a range of examples and experiences from multiple locations, which means that the outputs related to service priorities and the needs of rural consumers are more legitimately representative. This was one of the greatest strengths of this method.

Figure 3.15: Participant response to the statement 'There was enough time to discuss the issues properly'



Source: All participant evaluation forms (69)

In two hours, both the online deliberations and focus groups were able to deliver a lot of information capable of addressing the overall research question. Participants also tended to feel that they had enough time during these

discussions to fully discuss the issues. In the significantly longer structured dialogue three quarters of participants strongly agreed with the statement that they had 'had enough time to discuss the issues. Though the comments reveal that, for a significant proportion, they actually felt more time had been taken than needed.

In the dialogue the process was similar to the focus group and online deliberations – moving through a series of activities that began by exploring initial reactions, to providing information, reflecting on the services most valued by consumers and then considering expectations of service standards. However, the range of activities, and the time for more in-depth discussions in small groups meant that the dialogue produced the most detailed set of outputs for analysis. This was particularly true in relation to identifying principles for service standards by which Outreach services could be monitored and assessed. That said, participants and facilitators agreed that a deeper understanding of needs, and the preparedness to balance the availability of services with expected standards, may have been achieved through engaging exclusively with existing Outreach service users.

Comparative costs

In this project, the 3 different methodologies under trial were all delivered simultaneously in order to test their efficacy, as well as generate research outputs that would address the policy question. This is an unusual approach to consumer research and was used specifically because of the joint focus of the research project: i.e. to deliver both topic findings and methodological comparisons. In most consumer engagement contexts, it is likely that a single method would be chosen, or that different methods would be used at different stages of a research project.

The resources that would be required to replicate the different types of fora used in this project on a similar topic are outlined in the table below. The table shows the staff time and other direct costs in planning and delivering a single event using each methodology, and the resources required for any additional events. The costs assume full analysis and reporting of findings from each fora, including a standard statement of methodology (rather than the comparative evaluation of methodologies that was carried out for this piece of research).

Staff time has not been given a financial value as the rate charged would vary depending on the skills and experience of the particular staff contracted for the project. However, a commissioning body could expect to be paying between £600 and £1000 per day for externally contracted specialist staff.

Table 3.9: Resources required to replicate each fora

1 FOCUS GROUP (2 hours, 1 facilitator)	
Research staff time	
Set up, planning and design of materials	2.7 days
Facilitation (including travel and set up time)	0.5 days
Analysis and reporting	1.5 days
Total	4.7 days
Other costs	
Recruitment (of 10 participants, aiming for at least 8 attending)	£650
Incentives	£300
Travel and subsistence	£100
Venue hire	£250
Transcription	£115
Total	£1,415

Per additional focus group	
Research staff time (including 0.5 days analysis and reporting)	1 day
Other costs (as above)	£1,415

1 STRUCTURED DIALOGUE (6.5 hours, 2 facilitators)	
Research staff time	
Set up, planning and design of materials	4.4 days
Facilitation (including travel and set up time)	2 days
Analysis and reporting	3 days
Total	9.4 days
Other costs	
Recruitment (of 25 participants, aiming for at least 20 attending)	£1,625
Incentives	£1,500
Travel and subsistence	£200
Venue hire	£1,000
Transcription	£600
Total	£4,925
Per additional structured dialogue	
Staff time (including 1 day analysis and reporting)	3 days
Direct costs	£4,925

ONLINE GROUP (2 hours, 1 facilitator)	
Research staff time	
Set up, planning and design of materials	3 days ¹⁹
Facilitation (including set up time)	0.4 days
Analysis and reporting	1.5 days
Total	4.9 days
Direct costs	
Recruitment (of 15 participants, aiming for at least 8 attending)	£880
Incentives	£600
Online software hosting and running costs	£1,000
Transcription	£115
Total	£2,595
Per additional online group	
Staff time (including 0.5 days analysis and reporting)	0.9 days
Other costs (as above, excluding software costs)	£1,595

¹⁹ Time needed for set up, planning and design of materials is longer for the online group than for a focus group of the same length. This reflects the time needed for the facilitator to familiarise themselves with the online system, send participants the necessary log-in details and respond to queries, and carry out test runs of the online platform.

The resources required may be lower or higher than those set out above depending on a range of variables:

- the number of participants for each forum.
- the number of recruitment quota to be fulfilled (the above costs assume quotas on sex, age, working status and social class, plus additional quotas, as required for this research, on use of and satisfaction with postal services).
- location(s) – the above costs are based on focus groups and structured dialogues being carried out in locations similar to those that were used for this research (Melrose and Peterhead). Costs for travel and subsistence may vary depending on the location used.
- the recruitment method used. Costs for the focus group and structured dialogue are based on face-to-face recruitment, whereas those for the online group are based on recruitment being carried out by telephone, as this provides the opportunity to target people from geographically dispersed locations. If face-to-face recruitment is used for the online group, the recruitment cost may therefore increase.
- the level of incentive offered to participants – the above costs are based on offering £30 per focus group participant, £60 per structured dialogue participant and £40²⁰ per online group participant. If, for example, the structured dialogues were shortened to half a day, we would recommend an incentive of at least £40.
- the amount and complexity of information that the facilitators are required to familiarise themselves with and translate into accessible materials for participants (and the degree to which the responsibility for this falls on the contractors).
- whether or not respondents are required to undertake any tasks in advance, which could be an option for structured dialogues in particular. Additional staff time and respondent incentives may be required in such cases.
- whether or not break out groups are required in the structured dialogues and the number of break out groups anticipated. If there are more than two break out groups, more than two facilitators may be necessary.
- whether or not the discussions are to be transcribed. Professional transcribers typically charge 90p to 95p per minute for transcription
- the online software package used for the online groups. Different options are available, and costs may vary depending on the format used.

Costs may also vary depending on how many different types of fora are used. For example, if focus groups, structured dialogues and online groups are all used, there may be cost efficiencies in the set up and planning of the groups. However, this may be balanced by additional analysis time required to compare and contrast findings across the different types of fora, rather than reporting on a single process.

²⁰ For the online groups, although participants were offered £30 as an incentive, due to the lower than anticipated turnout in two of these groups, we would recommend increasing the incentive offered to £40 to help achieve a higher level of participation, based on using telephone recruitment.

Conclusions

The purpose of this methodology report has been to address the CFU's primary research question: Which deliberative research methods are most effective at identifying and understanding what matters most to Scottish postal consumers, and why?

In order to do that the discussion in this chapter has focussed on exploring which of the selected methods - focus groups, structured dialogues and online deliberations - was most effective in providing evidence of what matters most to Scottish postal consumers in remote and rural areas. It has done this by considering the process, experience and evaluations of the seven engagements events delivered for the CFU between February and March 2017 about what aspects of Post Office Outreach services are most important to the people served by them.

To facilitate an evaluative comparison designed to assess the added value of using deliberative methods for consumer engagement, the CFU therefore established a range of criteria for 'effectiveness' at the outset of the project. These were:

- a) the suitability of the method to the topic area and the specific policy question;
- b) the accessibility of the consultation to participants;
- c) the method's ability to provide information in accessible and relevant ways regarding the complexities of the sector;
- d) its ability to engage participants with the topic;
- e) its capacity to draw out meaningful dialogue and deliberation;
- f) the quality, depth and complexity of qualitative and, to the extent possible, quantitative data gathered;
- g) delivering outputs that capture consumer insight in ways that are relevant and useful to policy making; and
- h) being replicable and affordable.

It is against these criteria that conclusions will now be drawn, with particular attention given to what additional benefits the structured dialogues and online deliberations were able to bring over and above a standard focus group.

Assessing the effectiveness of a specific methodology is both a subjective and context sensitive process. Further, the success of a particular engagement event is dependent on a range of factors aside from the methodology: including the detailed process design, the experience and skills of the facilitators, the mood, mix and temperament of the participants on the day and even the weather.

The purpose of this methodological analysis, however, is not simply to evaluate the effectiveness of the particular fora reported on here but also to inform how the CFU engages with consumers in the future. For this reason, while the specific consultation events that were delivered for the CFU will be used to illustrate the conclusions, the lessons learnt throughout the process and the research team's wider experiences of using these methodologies will also be drawn upon to demonstrate whether there is a case for using deliberative methods to engage consumers with policy and practice within the postal service and, by extension, the wider regulated industries.

a) Suitability to the topic

The three methods used were all appropriate to this research as the question posed was quite broad and exploratory: What aspects of the Post Office Ltd (POL) Outreach network are most important to consumers in remote and rural areas, in relation to accessing postal services, and why? Discussion based methods that allow participants to share stories and learn from each other, by comparing needs and experiences, before identifying priorities, were therefore particularly appropriate. As demonstrated in the findings section of this report the focus groups, structured dialogues and online deliberations all created suitable environments for these discussions to take place.

The underlying goal of the research was to help the CFU develop a consumer centred framework that can be used to monitor and assess the way Post Office Ltd delivers services to rural and remote communities. In each of the workshops, albeit to varying extents, participants were therefore encouraged to work together to identify collective priorities and negotiate reasonable expectations of service provision, taking into account not only their own needs but also a wider societal perspective. Developing this sense of 'public-spiritedness' wherein participants explore different viewpoints to develop conclusions, rather than looking to the issue only from how it affects their personal situation, is one of the key features of successful public deliberations. This is exemplified by the earlier referred to case where participants who had initially viewed the provision of financial and banking services by the Post Office as a low priority listened to others from different villages where such services were not otherwise available and revised the level of importance given to these services accordingly. Although more traditional qualitative, and even to an extent quantitative, methods could have been used to identify and collate individual service priorities, it was in the deliberative components of the workshops that this overall purpose was most fully addressed, and the structured dialogues that most effectively achieved clear outputs in this regard.

Key Conclusions:

- Focus groups, structured dialogues and online deliberations, when well designed and delivered, are all effective consultation methods for this type of topic and policy question.
- That the opportunity to hear the views and perspectives of others allows people to develop an understanding of the needs of others and re-assess their own priorities accordingly.
- The deliberative features that were part of the structured dialogues and the online deliberations encouraged participants to consider wider public benefits in their assessment of priorities for service provision.

b) Accessibility to participants

A variety of measures were put in place to ensure that the fora were accessible to those within the target group – in this case a representative sample of people living in rural and remote areas served by the Post Office Outreach network. For example, all of the fora were planned to take place outside standard working hours to enable as wide a range of people to attend as possible. The locations for the focus groups and structured dialogues were also chosen to be central and accessible within each catchment area and participants had the opportunity to identify any additional support they would need to participate during the recruitment process. Participants were also all given a monetary 'thank-you' (between £30 and £60), designed to recompense them for any travel, care or opportunity costs incurred in taking part. Each fora was attended by a mixed demographic from the targeted geography and the vast majority of participants reported that the venues were both easy to get to and suitable for their needs and that the 'thank-you' payment was fair.

There was some concern initially that using an online method to engage rural and remote participants may not be inclusive, however feedback during the phone recruitment process did not indicate that this was either off-putting or a barrier for participants. The fact that the software platform chosen also required no specific software to be installed, and that the discussion was joined via telephone, also made taking part in the online deliberation logistically very easy for participants. Despite taking a few minutes at the beginning of each initial session to ensure everyone was able to view the presentation and find the response 'buttons' even those who described themselves as 'IT novices' agreed that it was an accessible format.

A further strength of the online format for this project was that it made the consultation accessible to participants in rural and remote areas who would have been difficult for a Central Belt based organisation to engage, particularly in a deliberative format, in any other cost-effective way. This was also recognised by many of the participants who appreciated that efforts had been made to include them in the consultation.

Key Conclusions:

- The focus groups, structured dialogue and online deliberations all proved to be accessible to participants, as attested to by the demographically diverse participants (in terms of age, gender and working status) that took part.
- The structured dialogue, taking part over a whole day, may have been less accessible to people with primary caring responsibilities, although this was not specifically reported as a barrier to participation.
- The online deliberations served to make the consultation particularly accessible to people from different remote rural areas to participate in a discussion together, in a way that face-to-face meetings could not have viably done.

c) Provided information in accessible and relevant ways

Although a learning phase is a key feature of deliberative engagement processes, for participants to be able to contribute productively to addressing this research question there was not a need for them to be introduced to significant amounts of new information. As discussed in the previous section of this report, it was anticipated that most of the information used to inform discussions would come from the participants themselves, through sharing their experiences of using Post Office services. The facilitator's role as information provider was therefore limited to explaining the context of Post Office Ltd.'s Network Transformation Programme, clarifying the difference between service delivery models (Appendix A) and highlighting the range of services offered by the Post Office (Appendix B). In each of the fora the same information was provided in very similar formats and, in their evaluations, over 75% of participants in all fora agreed that the information that was presented was 'fair and balanced', 'clear and easy to understand' and enough to enable them to form opinions on new subjects.

Key Conclusions:

- The information that participants needed to address the specific research question in this case came mainly from their own experiences, and the experiences of others in the room.
- However, the focus groups, structured dialogues and online deliberations were all able to effectively provide participants with additional background and contextual information in a way that was both relevant to the needs of the discussion and easy to understand.

- If there had been a need to provide more detailed or technically complex information to participants it is likely that the limited time at the focus groups and during the online deliberations may have made this problematic.
- One way that this could have been overcome using the online format (which met on two separate occasions) would have been to provide additional written information for participants to consider between meetings.

d) Engaged participants with the topic

Throughout all of the fora the facilitators reported that the vast majority of participants were effectively engaged in the discussions throughout. The topic itself shares some responsibility for this, as it was one where almost everyone had a story to tell and an intrinsic awareness of the Post Office's role. Despite a number of the participants having limited personal experience of using the Outreach services they were all able to use their own needs and experiences as postal consumers, and their understanding of the needs of their rural and remote communities, to contribute to the discussions in productive ways.

The focus groups and online deliberations covered all of the questions necessary to address the research question within the two hours allocated and, from the evaluation, it appears that participants left feeling they had both had the opportunity to say everything they wanted to say and that all relevant aspects of the topic had been covered. Given the mixed levels of experience with and interest in the Post Office, maintaining the engagement of participants throughout the daylong structured dialogues was largely dependent on the ability of the facilitators to adapt the discussion plan and recast the questions in ways that allowed everyone to contribute.

Key Conclusions:

- Participants in the fora generally found the topic itself engaging and relevant and thus were able to contribute effectively to the discussion around broad priorities and expectations of Post Office services in rural and remote communities. They were however generally less engaged with the discussions about specific options within the Outreach network due to limited personal experience of using some of these services.
- There is little to differentiate the effectiveness of each method in terms of its ability to engage consumers with the topic.

e) Enabled meaningful dialogue and deliberation

Central to the success of any deliberative process is the space it creates for peer-to-peer dialogue, where participants learn together, gain a greater understanding of each other's perspectives and, in some cases, revise their own views as a result. As demonstrated in the previous section of this report there is evidence of dialogue emerging in all of the fora as participants shared their experiences of using the Post Office and developed an understanding of each other's needs, and the wider needs of their communities.

Of the three methods however, the structured dialogues enabled the greatest depth of dialogue and the highest level of deliberation. This was not simply because of the additional time given to participants, but also due to the range and types of tasks participants were asked to undertake, including a number of self-facilitated discussions that explicitly asked participants to listen to and consider other's perspectives before developing collective responses. This structure also contributed to there being higher levels of consensus achieved in these groups than found in the other fora.

Despite the challenges of developing conversational rapport in the online deliberations due to the lack of face-to-face contact, this method did enable the development of dialogue. Participants in these sessions were generally very interested in hearing about the experiences of participants from other areas, and the discussions that worked best using this format were those where participants came from the most diverse locations. The break between meetings in the online deliberations also worked particularly well as it allowed participants the opportunity to reflect on what they had learnt and speak to others in their communities before the second, more deliberative, session.

Key Conclusions:

- The structured dialogue method provided the greatest opportunity for dialogue and deliberation between participants, in ways that both drew out and collectively interrogated their preferences, motivations, priorities concerning access to postal services in general, and using the Outreach network.
- Compared to the focus groups, the greater diversity of experiences people brought to the online deliberations, due to their differing locations, enabled a more effective learning phase as the basis for later discussions, although the depth of dialogue and deliberation achieved was lower.
- The break between sessions in the online deliberations however did enhance the level of deliberation in the second session as it enables participants to return to the discussions with more considered and informed views.

f) The quality, depth and complexity of the outputs

Each of the fora produced a range of qualitative and, to a degree, quantitative outputs that captured the views, preferences and priorities of postal consumers and which, through analysis by the research team, enabled key themes to be identified and consolidated in response to the research question.

The depth and complexity of the outputs from each forum however did vary. The focus groups did successfully address all of the elements of the topic required to form a response to the research question, however the depth of discussion, and therefore the amount of information gathered that would enable a deeper understanding of consumers reasoning, was limited. By contrast, in the structured dialogues, the range of activities, and the time for more in-depth discussions in small groups, produced the most detailed set of outputs for analysis and provided the greatest depth of understanding in relation to consumer priorities and the trade-offs they were willing to accept. There was also space within this format to directly explore some of the deeper, underlying aspects of the research question. For example, principles for service standards by which Outreach services could be monitored and assessed were directly discussed in the structured dialogue, whereas conclusions about this aspect of the research needed to be extrapolated by the research team from the wider discussions in the other fora.

While the online deliberations effectively allowed for a geographically dispersed sample of the population from rural and remote communities to participate in the consultation in a way that the other methods could not, the depth and complexity of the outputs from these discussions was similar to that from the focus groups. They did however provide valuable data for analysis, particularly from the lived experience and perspectives of those living in very remote communities.

Key Conclusions:

- The structured dialogue method provided the most detailed and nuanced understanding of consumers' priorities and expectations regarding the services provided by Post Office Ltd to rural communities and as such was most effectively able to answer the research question.
- The online deliberations, while not providing the same quality and depth of evidence, did enable the input and perspectives of a wider range of rural and remote consumers to be included in the research in a deliberative format than would have been feasible using other methods and as such provided valuable outputs.

g) Delivers outputs that capture consumer insight in ways that are relevant and useful to policy-making

All of the fora took participants through a process that began by exploring their initial responses to services in their area, provided additional information, encouraged dialogue about the services most valued by rural communities and finally considered consumers' expectations of service standards and acceptable trade-offs. The fora were all able to provide a range of outputs to inform future policy and practice from a consumer perspective, ranging from existing levels of satisfaction with Post Office services to priorities for the future sustainability of service provision.

While detailed outputs specifically related to the Outreach network were limited in some of the fora this was not a reflection of the method chosen, but rather a result of the recruitment framework established for the project as a whole.²¹

Key Conclusions:

- All of the methods used in this research project effectively provided insight into consumer opinions, experiences and priorities. This insight should be useful to policymaking and the evaluation of postal services for rural and remote communities.
- The results from each of the fora were also broadly consistent, which should give policymakers confidence in the veracity of the conclusions drawn regarding the policy research question.
- The structured dialogues produced the most, and also the most detailed, outputs for analysis and as such delivered the greatest level of insight into the reasons behind consumers' priorities.
- Unlike the structured dialogues and the focus groups, the online deliberations were not restricted to a single, local example of service provision. Instead, they were able to draw on the participants' different experiences with branches across the country to compare and contrast strengths and limitations. On this basis, the findings from these fora may more generally represent the experiences and priorities of rural consumers across Scotland.
- The outputs from the research may have been more useful to policy making if the recruitment frame for the research had focused exclusively on users of the Outreach services specifically, rather than consumers living in the areas served by these services.

²¹ As noted earlier in the report, the recruitment framework sought to involve a mix of consumers living in areas where they had access to the Outreach services, rather than specific users of these services.

h) Is replicable and affordable

As illustrated by the table of comparative costs included earlier in this report, deliberative methods are usually more expensive to deliver than more traditional qualitative consultations. This is not simply because they will usually involve participants in longer discussions, but also because they will usually require more planning and higher levels of facilitation. Further, the skills needed to plan and facilitate effective deliberative engagement events are more specialised, and therefore contractors will tend to charge more for these services.

In this research project, the structured dialogues ran for a considerably longer period of time than either the focus groups or online deliberations. However, this is not the only reason that they were able to deliver outputs that gave the CFU greater insight into consumer preferences and priorities. Rather it is the approach to dialogue and deliberation inherent in these methods, and therefore the types of prompts given to participants and the types of tasks that they are asked to undertake, that distinguish the character of the outputs. Thus, while a shorter structured dialogue may still have been capable of delivering clear evidence of consumers collective reasoning (i.e. deliberation), simply running a longer focus group may not have.

Key Conclusions:

- Deliberative methods will usually cost more to plan and deliver than other qualitative consultation methods.
- Considerations of affordability and value for money must come down to identifying the types of outputs that are most important for the success of the research i.e. what it is that the commissioning body really wants to know.

Overall methodological conclusions

The purpose of using three different methodological approaches in this research project was to test which deliberative research methods are most effective at identifying and understanding what matters most to Scottish postal consumers and assess whether using more deliberative methods added value to the outputs.

As evidenced in the findings section of this report all of the methods used, including the focus groups, were able to effectively address the policy research question and provide the CFU with clear insight into rural consumers' priorities, concerns and expectations of service from Post Office Ltd.

There were however limits to what was able to be achieved by using a focus group format, and not simply due to the limited time available for the discussion. Focus groups are traditionally a primarily extractive form of consultation, where participants take part as individuals, albeit in a group context. The discussion structures used in a focus group will therefore generally concentrate on the collation of individual responses and the reactions to the opinions of others. Although an explicitly deliberative component was included in the discussion guide for these focus groups to enable fairer comparison, the outputs produced in these sessions lacked the negotiated quality and purposeful consideration of the views of others that was evident in the outputs produced in the other fora.

The online deliberations, which each lasted for a similar time to the focus groups, produced different types of outputs therefore, because of the way the fora were structured and facilitated. In these discussions participants demonstrated clear evidence of having developed their opinions from hearing about experiences in other areas of the country. Further, having time between sessions to discuss the topic with others meant that the overall outputs were more reflective and deliberative, particularly in relation to the wider priorities for service provision and the trade-offs that would be acceptable

to communities. This method also effectively allowed for a geographically dispersed sample of the population from rural and remote communities, including a number of island communities, to participate together in a discussion that would have been logistically prohibitive if the online method had not been used. This also meant that, unlike the face-to-face meetings, the discussions that took place during these fora drew on multiple local experiences and, because of this, the outputs are possibly more generalisable in relation to the experiences and priorities of rural consumers as a whole.

However, the outputs produced through the structured dialogues provided the greatest level of insight into the reasons behind consumers' priorities, due to the emphasis given in the discussion guide to developing dialogue and creating the conditions for deliberation and public reasoning. This also enabled one of the key strengths of this method to be highlighted, i.e. the ability to incorporate a wide range of methods throughout a session to build up the participant's level of involvement in the discussion and gradually increase the demands being placed on them to collaborate on drawing conclusions. While the dialogues, particularly as delivered in this project over a full day with c.20 participants, demanded significantly more resources to deliver than the other types of fora, this was however balanced by the additional depth and quality of the information they provided.

This research clearly demonstrated that the structured dialogue method and the online deliberation format delivered added value, compared to the outputs produced by a focus group, although each did so in different ways. Determining which deliberative method was most effective however, will ultimately come down to which aspects of the findings the CFU find most useful for influencing policy and practice in connection with Post Office Outreach services. Further, by providing the CFU with a greater understanding of the types of outputs each method is best able to produce, the research will effectively help inform methodological choices for future engagement with consumers,

Appendices

Appendix A – Post Office Outreach Models

There are currently over 11,500 Post Offices operating across the UK.

Post Office Ltd. has 4 different models for how Post Office services are delivered.

1. **Crown Post Offices** – these are usually large branches in town and city centres that are directly managed by Post Office Ltd and usually located independently.
2. **Main Post Offices** - These branches have a dedicated Post Office counter within another retail premises. They offer customers a full range of Post Office products and services, during standard business hours. They are run by a subpostmaster. In most cases, they will also provide Post Office service provision at the retail position with most services also available there during the full hours the shop is open.
3. **Local style Post Office branches** – these are located within existing shops and provide a wide range of Post Office services from the retail till. They will usually provide Post Office services during all of their opening hours. As the services are provided by the retail staff however there are some services they can't provide, for example Passport Check and Send services or some manual bill paying services.
4. **Outreach Services** – as it isn't always possible to have a permanent Post Office in every town or village a core Post Office may provide a range of Outreach services. In addition to running their own branch, subpostmasters travel to nearby communities to provide and oversee Post Office services.
 - a. **Mobile** - Mobile Post Office vehicles visit over 250 locations every week in rural locations across the UK, at set times and on certain days of the week. These Mobile Post Offices are kitted out to provide a walk-in Post Office on wheels, with the added facility of an accessibility lift. They are operated by postmasters who can bring all the services that their core branches provide. These services include posting letters and parcels, personal banking and savings and insurance.
 - b. **Hosted** – Hosted services operated out of a local building like a cafe, village hall or community centre on certain days of the week. There are 69 Hosted services across Scotland. They are operated by postmasters who can bring all the services that their core branches provide. These services include posting letters and parcels, personal banking and savings and insurance.
 - c. **Partner** – here Post Office services are offered through a partner – for example a local shop. Usually customers can access over 80% of Post Office services there whenever our partner's business is open. This is very similar to the local model but supported by a sub-postmaster. (Most Partner services are lately transforming into Local style branches).
 - d. **Home** - This is a service for very small communities and enables customers to order a reduced range of Post Office products and services over the telephone. The products will then either be delivered to a customer's home by the core subpostmaster or are available for collection by the customer at a local Drop-In Session.



Appendix B – Summary of services provided by the Post Office

Postal Services including:

- 1st & 2nd Class Royal Mail
- Buying stamps
- Articles for the Blind – Inland & International
- Inland Home Shopping Returns / Europriority Returns Services
- Inland & International Royal Mail Signed For
- Inland Royal Mail Special Delivery Guaranteed by 9 a.m. / 1 p.m.
- Inland Medium & Large Parcels
- All Royal Mail & Parcelforce International Services (Air and Surface)
- Redirection – Business & Social / Inland & International
- Local Collect (Royal Mail; Parcelforce Convenient Delivery / Collect; P739)



Financial Services: including personal and small business banking services

- Cash Deposits and Withdrawals (from Post Office accounts and High St banks)
- Money transfers
- Use a Post Office Account Card to receive state pensions, benefits and tax credits
- Transcash (including FreePay Charitable Donations)
- HMRC Business Cashcheques / Local Authority Cashcheques
- Enveloped Cheque Deposits (Santander plus all Partner banks)
- Cash ISA & Investment ISA – Top-Up Payment (by Cash/Card/cheque)

Bill Paying: automated and manual payment of bills

- Electricity Keys Top-Up / Quantum Gas Card Top-Up
- Bill Payments – e.g. utilities, phone, council bills, insurance or income tax
- Budget Card / Pre-paid Card / Christmas Club Top-Ups
- Postal Orders

Retail services: including

- Gift cards
- Lottery tickets - National Lottery and The Health Lottery
- Stationary
- All Mobile Card E-Top Ups and refunds
- All Mobile E-Vouchers
- £5 Phonecard

Travel Services:

- Travel Money Card – Top-Up (various currencies)
- Bureau de Change
- Moneygram
- Travel insurance

Government Services

- POCA – Account Opening & Management / Card Management / Emergency Payments / Replacement Cards
- Driving License applications
- Asylum Seekers Payments
- Environment Agency Fishing Licences
- Motor Vehicle Licensing
- Document certification.

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