



## Keeping communities connected: consumer views on Post Office Outreach services

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# Keeping communities connected: consumer views on Post Office Outreach services

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# Contents

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1. Executive Summary	1
2. Background	2
3. Research	3
4. Findings	4
5. CFU conclusions	6
6. CFU recommendations	6

## 1. Executive Summary

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- 1.1. The Consumer Futures Unit at Citizens Advice Scotland carried out innovative deliberative research into what aspects of the Post Office Ltd Outreach network were most important to consumers in remote and rural areas, and why.
- 1.2. The research, carried out by Ipsos Mori and Involve, was prompted by an internal CFU review of previous work on Outreach services. This internal review identified inconsistencies in previous methodologies used to evaluate Post Office Outreach services, making it difficult to compare the results of research over time. Our latest research, summarised in this report, is the first step to developing a robust evaluation framework.
- 1.3. The research's participants, all consumers who lived in remote and rural areas, valued good customer service from staff, reliability of services, and practicalities such as opening times and privacy.
- 1.4. We also found that both awareness and use of Post Office Outreach services were low among research participants, despite all participants being recruited from areas with at least one Post Office Outreach service nearby.
- 1.5. Communication was also a common theme during the research. Participants spoke about promoting the opening times and product ranges of Outreach services generally, but also how effective communication should be a vital part of contingency arrangements if something goes wrong and the regular provision of an Outreach service is affected. Participants referred to the importance of good communication, and were vocal about the frustration that can be caused by poor communication.
- 1.6. The CFU intends to use these findings to draft an evaluation framework for Post Office Outreach services, following the recommendation from previous consumer advocacy work to establish regular and consistent monitoring of Outreach services.
- 1.7. This will help POL (Post Office Ltd) and the consumer advocacy bodies across the UK to evaluate how Outreach services are performing and where a service may need to be modified or provided with extra support in order to continue meeting the needs of its community.



## 2. Background

- 2.1. The Consumer Futures Unit (CFU), part of Citizens Advice Scotland, uses research and other evidence to put consumers at the heart of policy and regulation in the energy, post and water sectors in Scotland. We work with government, regulators and business to put consumers first, designing policy and practice around their needs and aspirations.
- 2.2. In 2016/17, we embarked on a new programme across all three of the sectors we cover, to apply innovative ‘deliberative’<sup>1</sup> research methods to engage consumers effectively in these policy areas, and to influence policy-making with that enhanced consumer perspective. We consider that it is in the interests of consumers, business and government that policy is designed around the way consumers will interact with it, as this will substantially increase the prospects for success.
- 2.3. Post Offices are important to most of us, but they are particularly important to disabled consumers, consumers on low incomes, older consumers and those in rural areas<sup>2</sup>. For these consumers, a Post Office can be a lifeline, ensuring access to critical services like sending and receiving mail, banking and finance, and bill payments.
- 2.4. At a time when the Post Office network is being challenged to do more with less, Post Office Ltd (POL) have developed Outreach services. These services let consumers access post and other products in areas without (and sometimes in place of) a traditional, permanent, bricks and mortar Post Office. Increasing numbers of Scottish consumers are within reach of these Outreach services, with the number of branches more than doubling since first introduced, to over 10% of the UK network today.
- 2.5. Outreach services are delivered from a pre-arranged location at set times of day and days of the week by postmasters travelling from other Post Offices. Outreach services are located in buildings with other core functions (e.g. local authority buildings or churches), or from specially designed vans that act as Mobile Post Offices. Occasionally (for very rural remote areas) Outreach services can deliver products on request directly to a consumer’s home or to an established collection point.
- 2.6. Outreach services are not commercial operations. They exist in areas where there is no nearby alternative for consumers to access the vital services a Post Office can provide, and often replace a bricks and mortar Post Office that is no longer commercially viable. Outreach services are a response to the challenges and opportunities that consumers face in rural and remote areas, and the CFU wanted to assess how well Outreach services are meeting the needs of the communities who are dependent on them. To do that, it was important to hear from consumers directly on what they need from a Post Office service, and what matters to them about the way that service is delivered.
- 2.7. In light of the forthcoming end of the Post Office’s change programme, Network Transformation, and with another slew of bank branch closures announced just at the end of 2017<sup>3</sup>, the CFU wants to see these vital services maintained for the consumers who need them and in a way that works for those consumers, appropriately supported by POL (Post Office Ltd).

<sup>1</sup> ‘Deliberative’ public engagement is a distinctive approach to involving people in decision-making. Where traditional consumer engagement tools, such as opinion polls or customer surveys, tend to measure ‘top of the head’ public views, deliberative public engagement relies on techniques such as citizens juries, citizens assemblies, structured dialogues or other methods to be able to offer policy and decision-makers richer data on public attitudes and values, and opportunities to explore more fully why people feel the way they do, and to create time to develop ideas, options and priorities with the public. For more information, see [Meta-analysis and scoping exercise into public participation in the regulated industries](#).

<sup>2</sup> [Citizens Advice \(2017\) Consumer Use of Post Offices](#)

<sup>3</sup> [BBC \(2017\) RBS to close one in four branches and shed 680 jobs](#)

## 3. Research

- 3.1. The CFU asked Ipsos Mori and Involve to carry out in-depth deliberative research with consumers in remote and rural areas, asking what aspects of the Post Office Ltd Outreach network were most important to them and why. Participants were recruited on a geographic basis from areas where a Post Office Outreach service was already provided, with the aim to recruit a mix of users and non-users of Post Office Outreach services.
- 3.2. The research team struggled to recruit Post Office Outreach service users, leading to one of the first findings: awareness of Outreach services is extremely low, even in areas where an Outreach service would ostensibly be a resident’s nearest Post Office branch. It was unclear at recruitment stage why it was difficult to find users of Post Office Outreach services. However, the later stage of the research strongly indicated that many consumers who lived near enough an Outreach service to use it were unaware the service existed, or if they knew of the service, local consumers were unclear on the days and hours it was provided. Although the research did not set out to test awareness of Post Office Outreach services, this is an important incidental finding.
- 3.3. Once recruitment was complete, the research team used a mix of methods to understand what participants would value most in an Outreach service, from the kind of products offered to the way the service was delivered. Participants met in Fraserburgh, in Melrose, and online, to discuss what aspects of the Post Office Outreach network were most important to them and their communities. The discussions took the form of focus groups, online deliberations and all-day structured dialogues.
- 3.4. The conclusions from all three methods of deliberative discussion had much in common, but the structured dialogue offered the most in depth understanding of the consumer perspective in remote areas. These conclusions will allow the CFU to draw up an evaluation framework for Outreach services, monitoring service provision over time and identifying where postmasters may need support or adjustments to the current model.
- 3.5. Although each Outreach service is unique to the particular circumstances of its community, this research suggested that there are similarities in what communities most value.



## 4. Findings

4.1. When participants were asked to identify characteristics they associated with a good postal service generally, the following factors were seen as the most important:

- 4.1.1. Good customer service from staff – while research participants expected staff to be both knowledgeable and helpful, the latter was the priority. Participant discussions suggested that a staff member who did not have all the answers, but was happy to find out, was more important than a knowledgeable staff member who was impolite or unfriendly. The importance placed on the quality of staff is supported by other research, beyond the postal sector.<sup>4</sup>
- 4.1.2. Reliability of the service – this included consistent opening days and times, working technology, and contingency options in place should the service be unavailable.
- 4.1.3. Convenience – participants wanted convenient opening times and locations; were concerned about accessibility for those with limited mobility; and thought a level of privacy should be available for any transactions that customers may wish to be discreet about.

4.2. Participants saw these same ‘good service’ principles – customer service, reliability and convenience – as important for Outreach services too. In the research sessions, participants looked at how those principles should apply to Outreach services, and in particular considering the different models used for operating Outreach services. Outreach services are generally provided in one of four different models:

- 4.2.1. Hosted – where a postmaster sets up a temporary Post Office in a community building not normally used for that purpose (e.g. a pub, church, local authority building or community hall). The Outreach service is ‘hosted’ in this building at set times on a certain day, or days, of the week.
- 4.2.2. Mobile – where a postmaster provides a Mobile Post Office from a specially adapted van, often stopping to provide the Outreach service in many different locations in the same day. Like the Hosted model, the Mobile model operates from a pre-determined spot on certain days, at certain times.
- 4.2.3. Home – where a postmaster will deliver

products ordered over the telephone direct to a customer’s home, or will bring the products to a nearby drop-in session for collection. This model normally operates only in more remote areas.

4.2.4. Partner – where Post Office services are offered through a partner, often a local retailer. This is almost identical to the new Network Transformation ‘Local’ model as far as the consumer is experience is concerned, and as a result is being slowly phased out by Post Office Ltd.

4.3. In relation to these Outreach service models specifically, the research participants considered the following factors to be the most important:

- 4.3.1. Reliability for both the Hosted and Mobile services – participants were clear that they expected consistent opening days and times.
- 4.3.2. Location of the Hosted service – participants felt this should be central and accessible by public transport and without being exposed to busy or dangerous traffic.
- 4.3.3. Accessibility of the Mobile service – it was key for participants that those with mobility issues were catered for as much as possible.

4.3.4. Staffing knowledge and training – this 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.

4.3.5. Privacy when using the Partner service – participants thought that there should be options for privacy when conducting particular financial transactions. Although, participants acknowledged this may be restricted by the nature of premises in which the service was operating.

4.4. A consistent theme that emerged in discussion was also the important social role played by Post Offices in rural communities, particularly for consumers who were older, less mobile or lived in more remote areas. Participants frequently referred to the Post Office as a good source for local news and advice, but also questioned how that might evolve in the face of the financial pressures some postmasters faced.

<sup>4</sup> Ipsos Mori (2016) [Great Expectations: Are service expectations really rising?](#)



## 5. CFU conclusions

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- 5.1. Clear messages emerged through this research about the importance of good customer service from staff, reliability of services, and practicalities such as opening times and privacy. These good service principles were seen as important for any postal service, including Outreach services. The range of products available or length of opening hours, for example, did not feature as highly. This indicates that consumers in rural areas do understand some of the challenges in delivering a full Post Office service, but also value the key lifeline a Post Office Outreach service can be. Participants were also clear that even if their own use of a Post Office was limited, or if they were able to travel to their nearest town in conjunction with other errands to visit a Post Office, other more vulnerable members of their community saw local Post Office services as vital.
- 5.2. While the research highlighted the importance of Post Offices for rural consumers, it also made clear that awareness of Outreach services was low. This suggests a need for stronger communication about the availability of these services, to raise awareness in the communities they are aimed at. If Outreach services were used more, this would also help increase their viability for the local postmaster delivering the service.

## 6. CFU recommendations

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- 6.1. An Outreach service evaluation framework should consider staff knowledge, customer service levels, reliability and community communication. Absolute numbers or length of opening hours, are less relevant. Equally, having the widest range of products available isn't always necessary.
- 6.2. Outreach services should be evaluated on an ongoing basis in order to ensure agency operators have adequate support, and communities are getting the services they need.
- 6.3. Post Office Limited should support agency operators in communicating with the communities they serve, and offer guidelines on contingency measures and plans.
- 6.4. Agency operators should have adequate contingency and communication plans in place appropriate to the communities they serve in the event of service interruption, and should be supported in producing these plans.



For more information about the Consumer Futures Unit, visit:

[www.cas.org.uk/spotlight/consumer-futures-unit](http://www.cas.org.uk/spotlight/consumer-futures-unit)

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