

Research into the quality and consistency of service standards and product knowledge across the post office network

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1 Executive Summary

The following summary provides an overview of the survey results and examines these at each individual section.

This piece of work mirrored previous mystery shopping projects in understanding performance in different post office branches, using both mail and non-mail scenarios to assess the information provided by staff, as well as wider service measures such as access, facilities and general service. As such, comparisons have been made to previous studies where appropriate.

This piece of work was different, however, as nearly every branch type across the post office network was assessed using the same questionnaire, in order to understand the performance of the network and draw comparisons across branch types where appropriate.

1.1 Branch exterior and interior, including disabled facilities.

This section examines how easily the shoppers were able to conduct their assessments, including factors such as access, waiting times and staff performance:

- 2% of shoppers could not complete their visit due to the branch or post office counters / service positions being 'unexpectedly' closed.
- 70% of shoppers said there was parking 'nearby' (i.e. within 100 yards or so) increasing to 81% at PO Local and PO Main branches, but falling to 38% for WHSmith branches.
- The vast majority of branches had a visible Post Office sign or logo (98%), however a smaller proportion of branches displayed opening hours prominently (78%) and 69% of branches made references to Post Office services. This was particularly low in sub-post office branches at 46%. Where opening hours were displayed (n=1,403), the hours were the same as those displayed on the Post Office website in 95% of cases.
- In terms of access, 38% of branches had electronic doors (increasing to 80% in newly franchised Crowns) and 76% of branches had at least one, flat entrance wide enough for wheelchair access (increasing to 96% in newly franchised Crowns).
- The majority of post office counters were located on the ground floor (90%), but 8% of branches had counters on the first floor or higher (including 37% of WHSmith branches) and 2% had counters in the basement (including 7% of WHSmith branches). In branches where the post office counters were on a different floor, 75% had an internal lift.
- 77% of shoppers at PO Locals noted internal signage relating to the post office, although this was lower in sub-post offices (70%) and PO Locals (71%).
- In terms of accessibility, 92% of shoppers who assessed a branch with aisles felt that they were wide enough for wheelchairs (increasing to 99% of Crown branches and 97% of WHSmith and newly franchised branches) and obstacles were noticed in 5% of visits (increasing to 13% in sub-post offices).
- Over 6 in 10 branches (61%) had portable PIN pads, but other facilities for disabled customers were only available in less than half of branches as follows: including low level counter positions (47%), low level scales (37%), low level writing desk or shelf (41%) and hearing loops (41%).
- The average number of counters recorded was 3.0 on each visit, increasing to 4.5 in Crown branches; and 91% of branches had a dedicated post office counter (falling to 84% in PO Locals).
- Trade was described as either fairly or very quiet in 68% of assessments, compared to only 35% of assessments in WHSmith branches and 38% in Crowns. Indeed, 15% of Crown and 14% of WHSmith branches were classed as extremely busy. Lunchtime was the busiest time of the day.
- 49% of shoppers had to wait or queue (increasing to 80% in WHSmith and 77% in Crown branches) with an average waiting time of 3.21 minutes (increasing to 4.44 minutes in WHSmith branches). Transactions times were largely consistent across branch types and times of the day.
- 14% of shoppers said their wait was not acceptable, with one shopper waiting almost one hour in total at a WHSmith.
- In over half of assessments (52%), shoppers said that privacy or discretion was not required; and in the remaining visits 97% of enquiries were dealt with discreetly.

To summarise, whilst the larger high street branches were more likely to have better external access for

disabled customers (e.g. electronic doors, entrances that were wide enough for wheelchairs) and better internal access (e.g. wider aisles and no obstacles); in addition to more counters and a higher prevalence of disabled facilities such as portal PIN pads; they were more likely to be busier than PO Local and sub-post offices branches and, in general, shoppers had to wait longer to be served.

Therefore, whilst more could be done in PO Locals and sub-post offices to improve facilities for disabled people; more could be done in the bigger high street branches to improve waiting times.

Each shopper undertook at least one mail scenario and one non-mail scenario, with the findings shown below.

1.2 Second class large letter

- Overall, the level of questioning by staff in relation to this scenario was low, with shoppers in less than 4 in 10 assessments (38%) being asked about the contents of the letter, falling to 22% in sub-post offices.
- In addition, only 22% were asked about the value of the letter, falling to 7% in sub-post offices.
- Initially, 90% of shoppers were offered the correct option (the 75p stamp), although only 40% overall were offered this as the only option.
- A higher number of shoppers were offered the correct option only when they re-stated their needs, however 7% overall were not offered the correct option at all and 20% overall were offered the 75p stamp as a range of options.
- 85% of shoppers who were offered the correct option were told it would arrive within three working days.

In summary, whilst the majority of shoppers were offered the correct 96p stamp option (either as the only option or a range of options) there were some differences by branch type (with shoppers at privately managed branches being more likely to have the correct recommendation than in Crowns) and the level of questioning was low overall, particularly in sub-post offices and PO Local branches.

1.3 Special Delivery

- Overall 12% of shoppers were offered Special Delivery spontaneously prior to any staff questioning, rising to 24% of shoppers visiting Crowns.
- There were differences in the level of questioning with staff in PO Main branches more likely to ask key questions than those in Crown branches.
- Overall, 93% of shoppers were asked at least one 'key' question and 95% of shoppers, overall, were recommended Special Delivery.
- For those who were offered Special Delivery, the majority were told that it would guarantee next day delivery (84%), although the figure was higher in Crown and newly franchised branches; and most shoppers were told when it would be delivered. However, only one third of shoppers were told about the 9am and 1pm options, falling to only 25% in sub-post offices.
- Although the majority of shoppers were given the correct price for Special Delivery, this was not the case across the board with some very different prices provided.

In summary, 12% of shoppers were offered Special Delivery spontaneously, increasing to 24% in Crown branches. Staff in PO Main and newly franchised branches were most likely to ask relevant questions before offering the correct service. The majority of shoppers were offered Special Delivery (95%) and every shopper assessing a Crown branch was recommended the service; however over one in ten (11%) were not offered the service in PO Local branches.

1.4 Royal Mail Signed For second class Letter

Overall, of the 278 shoppers who undertook this scenario:

- 100 (36%) were offered the Signed For second class large letter stamp, as the only option following their initial enquiry.
- 43 shoppers (15%) were offered the correct option only following the request for a recommendation.
- A further 32 shoppers (12%) were offered the correct option only and 51 shoppers (18%) were offered the correct option as a range of options having re-stated their needs again.
- As such, 52 shoppers (19% overall) were not offered the correct option at all, despite asking for a recommendation and re-stating their needs.

- This may be on account of the low proportion of shoppers being asked the necessary questions to establish their postage requirement.

In summary, 81% of shoppers were offered the correct option at some point, which was the same across both sub-post offices and PO Locals. Across both branch types the level of questioning was low, although slightly higher in PO Local branches.

1.5 Royal Mail Signed For small parcel

Overall, of the 477 shoppers who undertook this scenario:

- 322 shoppers (68%) were offered the correct £3.95 option as the only option either initially, after asking for a recommendation or after re-stating their needs.
- 70 shoppers (15%) were offered the correct £3.95 option as part of a range of options (once they re-stated their needs).
- And 85 shoppers (18%) were not offered the correct option at all, despite asking for a recommendation and re-stating their needs.
- This may be on account of the fact that less than two thirds (63%) were asked about time sensitivity and a quarter (26%) were asked if the item needed to be tracked.

In summary, 82% of shoppers overall were recommended the correct option at some point (either as the only option or a range of options), although this was higher in certain branches (e.g. PO Local and WHSmith branches) than others (e.g. newly franchised).

1.6 International parcel

Overall, of the 281 shoppers who undertook this scenario:

- In over 1 in 4 (26%) visits shoppers were offered a service spontaneously, rising to 1 in 3 (33%) visits to WHSmith branches.
- 177 shoppers (63%) were offered the correct £5.60 option either as the only option or a range of options, spontaneously or after questioning.
- 104 shoppers (37%) were not offered this option as at all, increasing to 46% in WHSmith branches.
- Of those who weren't offered the correct option initially, there were differences in the proportion of staff asking about specific issues relating to the package.

Out of all the main scenarios, those enquiring about sending an international parcel were least likely to be recommended the correct option; and whilst over three quarters of staff asked about the contents and a requirement for a signature, less than two thirds asked additional questions. The level of questioning was particularly low in WHSmith branches, which may account for the lower number of correct recommendations.

1.7 Cash withdrawal

Overall, of the 480 shoppers who undertook this scenario:

- 95% were successfully able to withdraw cash (not via cash-back).
- 44% of those shoppers were told there was a limit, with the majority (82%) being told that the limit was imposed by the bank. The information relating to cash limits varied.
- 51% of shoppers who were able to withdraw cash were also told that there was a limit on the frequency of cash withdrawals.

In summary, whilst the majority of shoppers were able to withdraw cash, the level of information provided about limits and frequency of cash withdrawals was inconsistent.

1.8 Cash deposit

- 78% of shoppers were able to successfully deposit cash based on their requirements of their account, falling to 67% in privately managed branches.
- The main reason given for not being able to deposit cash was because the service was not available and that the shopper needed to use a larger branch.
- Of those shoppers who were able to make a deposit, a range of information was provided about limits and the reason why limits were imposed.

In summary, there were inconsistencies in the proportion of shoppers who were able to deposit cash and inconsistencies in the level of information provided.

1.9 Business deposit

- 83% of shoppers were told that deposits could be made at the post office they visited, including 54% who were told this spontaneously and 29% who had to prompt.
- Just over a third (34%) of those who could make a deposit confirmed that a deposit of up to £3,000 could be made; and a range of responses were given in relation to other factors such as paying-in books, methods of depositing money etc.

In summary, whilst a high proportion of shoppers were told that deposits could be made, there were inconsistencies in the provision of information relating to the deposit.

1.10 Passport Check and Send

- 100% of shoppers in Crown and newly franchised branches were told that the Passport Check and Send service was available. This compares to 90% or 94% of visits to privately managed and WHSmith branches but the picture was more mixed across the other branch types.
- The majority of shoppers in those branches where the service was not available were given an alternative post office.

In summary, the majority of shoppers were offered the service where it should have been available, but not all. Where the service was not available, a small proportion of shoppers were not given an alternative method of accessing it (6% in sub-post offices and 7% in PO Mains), increasing to 17% in PO Local branches.

1.11 Local Collect (re-delivery) and Amazon shopping

- Overall 84% of shoppers were told they could use the post office branch for Local Collect.
- 16% of shoppers were told they could not use the post office branch they visited including 21% at privately managed branches and 19% at PO Locals.
- There were inconsistencies in terms of the information provided including the contact methods to use for more information, the charge and how much notice was required.
- Overall 87% of shoppers were told they could use the post office branch for Amazon Collect.
- Differences were noted by branch type with PO Main and Crown branches more likely to offer the service than PO Locals.
- There were inconsistencies in terms of the information provided including the contact methods to use for more information, the charge and how much notice was required.

1.12 Parcel weight enquiry

- Just over half were given a weight limit, with a variety of responses given.
- In addition, there were inconsistencies in the responses relating to the maximum weight.

2 Introduction and Research Objectives

2.1 Background

The post office network plays a vital role in delivering essential services to communities, including universal access to mail, but also access to benefits, licensing, bill payment and banking services. It is particularly important to vulnerable consumers and those in deprived urban and isolated rural areas.

Approximately 17 million people visit the extensive network of around 11,600 post offices each week to access a range of social and economic services. Despite this, the network has been loss making (excluding government subsidy) since 2000 due to a decline in customer visits, a fall in revenue derived from government services, the loss of key contracts and increased competition from other suppliers.

2.1.1 Restructuring the post office network

In November 2010, the UK Government assigned £1.34 billion as part of the Network Transformation programme (NTP) to undertake a significant restructuring of the post office network to maintain its size and ensure its financial viability. The investment introduced new operating models for post offices: Post Office Mains (PO Mains) and Post Office Locals (PO Locals).

In November 2013 the Government announced an additional £640 million in funding for the NTP and extended the programme to the end of 2017/18. The restructured NTP began in April 2014. By 2018, Citizens Advice anticipates that approximately 7,500 sub-post offices will be transformed to PO Locals and PO Mains.

Since the start of October 2012, sub-post offices have been converted to PO Locals and Mains as part of the NTP. Conversion was originally voluntary but the restructured NTP introduced a more compulsory approach.

2.1.2 The Post Office Local and Local Plus models

The PO Local model results in a subtle but fundamental shift in the provision of Post Office services compared to traditional sub-post offices. Unlike sub-post offices, PO Locals provide Post Office services as a secondary offer over a main retail counter, with transactions performed by general retail staff, rather than by dedicated staff at a separate counter. They are situated in a wide variety of outlets, which can include convenience stores and petrol stations, and offer Post Office products and services over extended opening hours.

The arrangement has the potential to offer operational savings, as only one retail member of staff may be required across the post office and retail sides of the business, instead of a dedicated post office member of staff. Other savings will be derived from the new contractual arrangements, in which operators are remunerated on a transactional basis, as opposed to a sub-postmaster receiving a combination of fixed salary and transactional pay.

PO Locals are effectively a franchise arrangement. The contract requires franchisees to comply with standards in relation to branding, product range and sales advice.

PO Locals provide a more restricted range of Post Office products and services than are available at sub-post offices, with some manual banking, bill payment and international parcel services not available. According to Post Office Limited (POL) the service and product offering through PO Locals equates to 95% of Post Office services.

Citizens Advice's predecessor body, Consumer Futures, raised concerns about consumer access to services and products in rural areas as a result of the introduction of PO Locals. As a result, in August 2013 POL introduced a new variation of the PO Local model, the Local Plus.

Local Plus branches provide the same range of products and services as PO Locals but with manual banking, bill payment and international parcel services not provided at PO Locals. A branch is designated a Local Plus if it is 5 miles or more from a post office offering the full range of services or if public transport links are difficult. Local Plus branches are typically located in deep rural areas.

2.1.3 Post Office Main model

Branches converting to PO Mains are typically some of the largest and busiest town and city centre branches. POL envisages that following their roll out these branches will account for 40 per cent of post office customer visits.

Branches converting to PO Mains receive investment that can be used to cover the costs of conversion and help to create a modern and spacious environment. PO Mains have dedicated post office counters offering the full range of Post Office services during standard operating hours (9am to 5:30pm). Where a PO Main is attached to a retail business with longer opening hours, a more limited range of Post Office services is provided at the retail counter outside of core operating hours, in line with a PO Local offering. The majority of PO Mains will be hosted in large retailers such as branded chains or local independents.

Similar to the PO Local model, PO Mains are effectively a franchise arrangement and operators are remunerated on a transactional basis, as opposed to receipt of a combination of fixed salary and transactional pay.

2.1.4 Multiple retailers

Some PO Local and PO Main branches are in larger convenience stores operated by major retail chains, such as One Stop (a subsidiary of Tesco), the Martin/McColl¹ group, the Co-op and Spar.

Multiple retailers are managed by a separate team within the NTP and their contractual and operational arrangements may differ from those for independent PO Locals and PO Mains. In some cases, the multiple retailers undertake in-house staff training and introduce their own initiatives to improve the branch experience. Martin McColl and One Stop form the biggest multiple operators of PO Locals, and alongside the Co-op Group they are also the biggest operators of PO Mains introduced through the NTP.

2.1.5 The wider post office network

The nationwide post office network is also made up of several other branch types, including:

- Crown branches – flagship town and city centre branches run and managed directly by POL (3% of the network)
- Large privately managed branches – branches franchised to, and operated by, established retailers such as the Co-op, Martin McColl's and WHSmiths (approximately 3% of the network), operated on a modified sub-post office (MSPO), independent franchise post office (IFSO) or centrally franchised post office (CFPO) contract
- Sub-post offices – branches operated by a sub-postmaster (approximately 33% of the network)

Due to a decline in customer visits, a fall in revenue derived from government services, the loss of key contracts and increased competition from other suppliers, between 2007-08 POL franchised approximately 70 Crown branches to WHSmith and refurbished the remaining Crown estate.

In 2013/14 with the Crown network reporting stubborn losses, POL announced a further restructuring, known as the Crown Transformation Programme (CTP). The CTP intended to franchise approximately 70 of the then 373 Crown branches to eradicate the losses, and modernise the remaining Crown branches by 2015.

In many cases the investment in the existing Crown branches was intended to help create a better customer environment, reduce queue times and improve customer service, and make Crown branches more suited to offer more complex government and banking services. Measures that were introduced during the programme were:

- Larger, adapted premises – where possible, branches would have more available space to offer a wider range of products and services, and efficiently serve a larger volume of customers
- Post and Go machines – self-service machines that allow customers to weigh and post single or multiple items and buy selected items (including packaging) without queuing at a post office counter

¹ McColl's Retail Group has several operating brands, including Martin's, McColl's and, in Scotland, RSM McColl. For the purposes of evaluating PO Locals, Citizens Advice is treating these brands as a single entity ("Martin/McColl")

- ‘Take a ticket’ queuing systems – a queuing system whereby customers are required to take a ticket from the machine and then wait until their number is shown on a screen before going to a free counter
- Queue/branch hosts – a member staff who acts as a host by proactively asking customers if they need help and directing them to the appropriate part of the branch
- Additional seating – for waiting customers
- Dedicated interview areas – areas where post office staff can discuss more sensitive transactions, such as banking and government services, discretely

Just over 50 Crowns were successfully franchised in the CTP.

At the beginning of 2016 POL announced a further round of changes to the remaining 315 Crown branches. In January of that year POL announced its intention to franchise approximately 39 Crown branches to a range of retail partners, with plans to close a further three branches. In March 2016 POL announced a 10 year agreement with WHSmith to franchise and host approximately 60 Crown branches. In July 2016 POL announced that 19 Crown branches would be franchised to and hosted in a range of retailers. Some branches announced for franchising or hosting in March and July overlap with the initial announcement in January.

To date POL has publicly confirmed its decision to franchise or host 62 Crown branches in a range of retailers and to close 2 further branches. By the end of the current set of changes approximately 100 Crown branches, approximately 33% of the Crown network, will be franchised to or hosted in a range of retailers. We anticipate that this will leave a Crown network of just over 200 branches.

2.1.6 The performance of the post office network

Consumer Focus identified shortcomings in service at the 105 pilot PO Locals in 2012², including evidence of inconsistent and inaccurate product and pricing advice in even basic postage transactions. POL responded to these findings by taking steps to improve training.

In 2013 Consumer Futures conducted two waves of mystery shopping to monitor the quality and consistency of service standards and product knowledge in PO Locals. These found some improvements in PO Local service and some ongoing shortcomings. The shortcomings included inconsistencies in the information and advice about products (including prices) given to customers, and instances of some core services and products, such as travel money and facilities for people with disabilities, not being provided at all.

In 2014/15 Citizens Advice repeated this mystery shopping research and found that the performance of PO Locals had not satisfactorily improved since the start of the NTP – and that although in some areas there have been improvements, in other areas performance has declined.³ Problems with inconsistencies in information and advice remain, such as not being provided with the correct service required, or staff having insufficient knowledge to help.

The research also raised significant concerns around branch reliability, with a small but significant number of branches visited not being open at advertised times or the full range of services not being available. Accessibility into and around a small number of branches was raised as a concern. Finally, the research found renewed problems of PO Locals not accepting parcels up to 20kg and placing restrictions on the amount of cash that could be withdrawn.

In 2015/16 the mystery shopping research in PO Locals was repeated and for the first time included a sample of sub-post offices. The research uncovered an improvement, following mystery shopper prompting, in the overall quality, consistency and accuracy of product and pricing advice in PO Locals. The performance in some scenarios was in line with the performance of and advice provided in traditional sub-post offices. However, on many occasions PO Local staff initially, before being prompted, provided mystery shoppers with incorrect product and pricing advice or were unsure of the correct service to meet the shoppers needs. This indicated a lack of knowledge, expertise or wider training and support issues.

Consumer experiences of, and the product and pricing advice offered in **high street post offices** (i.e. Crown

² Consumer Focus (2012), *Open all hours? – Consumer experience of, and service standards in, Post Office Locals*, available online at: <http://bit.ly/1afm3WO>

³ Citizens Advice (2015), *Fixing the Foundations: Branch and service standards in Post Office Locals*, available online: <https://blogs.citizensadvice.org.uk/blog/changes-needed-to-new-style-post-offices/>.

branches and large privately managed branches) has been assessed, on a longitudinal basis, by Citizens Advice and their predecessors Consumer Futures. This has been assessed through commissioned mystery shopping surveys carried out by Postwatch in 2004,⁴ 2006⁵ and 2007,⁶ by Consumer Focus in 2008, 2009⁷ and 2011,⁸ by Consumer Futures in 2013 (unpublished) and by Citizens Advice in 2014 (unpublished).⁹ This round of research continues the previous work including the the most recent survey.

The 2014 mystery shopping research found that queue times across all branches in the high street network, particularly Crowns and WHSmith branches had deteriorated. Whilst in the majority of visits across all high street branches mystery shoppers were provided with the correct product or service to meet their needs, there was a decline in staff at PO Mains and WHSmith staff asking the correct questions to determine shoppers needs across both simple and more complex mails scenarios. Therefore, this wave of research will be important to determine if this trend has continued or there has been an improvement in queue times and quality of service, particularly at Crowns, WHSmith and PO Mains branches.

2.2 Research Objectives

There were two key reasons for undertaking this research. Firstly because Citizens Advice has statutory responsibility to ensure that the access criteria stipulated by the UK Government in 2007 are being met. Secondly because Citizens Advice is also responsible for ensuring that the post office network meets consumer needs. In order to assess whether the Post Office is meeting its statutory requirements and meeting consumer needs, the key objectives of the research were to understand the performance of:

- The post office network at this key time, as the NTP finishes and during significant on-going changes to Crowns
- New post office models being rolled out as part of the NTP and Crown changes, compared with traditional post offices
- Small and large post offices

The last wave of research to monitor service standards at **PO Locals** was conducted over a year ago, and since then the number of PO Locals has increased significantly. The previous research was important in reviewing the success of the PO Local model in maintaining Post Office services for consumers and, this latest piece of research has also focussed on assessing whether the previous improvements in the quality, consistency and accuracy of product and pricing advice have been maintained. In addition, this latest research continues to compare the quality of service provided by PO Locals with the service at traditional sub-post offices.

The last wave of research to monitor the quality of service offered in **high street post offices**, including queue times and product and pricing advice was carried out in 2014, having been undertaken previously by Citizens Advice /Consumer Futures since 2004.

The aim of repeating the study in 2017 was to understand the performance and service standards of different types of high street branches:

- Given the current round of changes to the Crown network, the findings focus on the performance of the recently franchised Crowns in 2013-15 and Crowns franchised to WHSmith in 2007-8, compared to Crowns
- As PO Mains become an increasingly significant part of the high street network, the findings focus on

⁴ http://www.consumerfutures.org.uk/wpfb-file/customer-experience-at-post-offices_full-report-2004-pdf

⁵ http://www.consumerfutures.org.uk/wpfb-file/post_office_product_advice_research_2006-pdf

⁶ <http://www.consumerfutures.org.uk/wpfb-file/customer-experience-research-at-crown-and-franchised-post-offices-2007-pdf>

⁷ <http://www.consumerfocus.org.uk/publications/evaluating-the-quality-of-service-and-product-advice-in-crown-and-privately-managed-post-offices>.

⁸ <http://www.consumerfutures.org.uk/wpfb-file/are-you-being-served-pdf>

⁹ A copy of this report can be provided upon request.

their performance to ensure that customers are getting good service and accurate advice from these new-style post office models. This was only the second time in which PO Mains have been included and surveyed in the sample of high street branches

Overall, the aim of the research has been to provide Citizens Advice with a comprehensive body of evidence on the quality of service across the majority of branch types in the post office network at a time of unprecedented change.

The research is also intended to add to, and strengthen Citizens Advice longitudinal evidence base on PO Locals and the high street network. As the NTP comes to an end, the findings from this research allow Citizens Advice to track the performance of PO Local since the beginning of the programme and directly compare against the branches they are replacing, traditional sub-post offices. In part the study aims to provide Citizens Advice with the ability to determine if the NTP is leading to good consumer outcomes.

Similarly, with the investment in and conversion of branches to PO Mains and the current set of changes to the Crown network, this study aims to provide crucial evidence to determine if PO Mains and franchised Crowns are maintaining high standards of service.

2.2.1 Measuring performance across the network.

Whilst the research was undertaken as one study and the findings reported as such, the objectives were slightly different across the different branch types, as below.

In terms of the **PO Locals and sub-post offices**, the research was designed to assess the quality and consistency of service standards in order to establish:

- Whether the service is consistent between PO Locals and sub-post offices and across all types of PO Locals (independent PO Locals, Local Plus, multiples) and between the two main multiple brands (One Stop and the Martin McColl group)
- How service standards compare to the previous waves of mystery shopping research in 2015/16

More specifically, the research was designed to deliver robust data on the following aspects of service:

- **Signage and branding**
 - Information displays about opening times, and service and product posters
- **In-branch service standards**
 - Service and privacy measures, i.e. whether there are separate post office and retail service points and whether there is a gap between serving points or privacy devices such as screens
 - Queuing times and queue systems, i.e. if there is only one queue for post office and retail transactions; if there is a dedicated post office queue how are customers directed to the appropriate counter (e.g. lines on the floor or other signage)
 - Accessibility measures, i.e. wheelchair access, availability of low-level scales and writing desks, portable hearing loops, portable PIN Pads etc., obstacles blocking access to the counter
 - Availability of specific products and services
 - Reasons given for the non-availability of services or transactions
 - Overall transaction times
- **Quality of product advice**
 - Accuracy and consistency of product advice for a range of transactions, including postage and banking queries
 - Quality of product advice and knowledge, i.e. proactive questioning to determine what service is most appropriate for the customer's needs; whether unnecessary upselling occurs
 - Whether staff members have to call for assistance from colleagues to undertake the required transaction
 - What advice is given to consumers if a service is unavailable, e.g. after the deadline for Special Delivery

- o Staff knowledge and advice on the wider Post Office product range (e.g. broadband, personal banking), when prompted and when not
- **Across all PO Locals - variation across opening hours**
 - o Availability of specific core products and services across all advertised opening hours
 - o Differences in staff product knowledge and advice during core operating hours (9am to 5pm) and extended opening hours

In terms of the **PO Mains and the high street network** the research was designed to assess the quality and consistency of service standards in order to establish:

- Whether service standards are consistent across PO Mains and the high street network, including newly converted former Crown franchises, Crowns and large privately managed branches, drawing examples of good, bad, improved or deteriorating performance

More specifically, the research was designed to deliver robust data on the following aspects of service:

- **Queuing**
 - o Time spent in queue (both per branch, and in conversions as a whole)
 - o Observations (e.g. number of counter positions in total and number that are in use at the time of visit, queue management measures such as 'take a ticket' queuing system)
- **Quality of advice provided by the post office counter staff**
 - o Advice provided over the counter
 - o Product knowledge of the chosen product scenarios
 - o What questions are asked to determine the most appropriate services
 - o Whether counter staff provide appropriate advice
- **Accessibility**
 - o Whether the branch offers step-free access
 - o Any features that enable consumers to get in and around the branch, e.g. automatic doors, wide aisles
 - o Any features that enable consumers to access services once in the branch, e.g. hearing loops, low-level facilities for wheelchair users
 - o Any obstacles that may hinder accessibility, e.g. stock in aisles, queue areas
 - o Welsh language availability (within branches sampled in Wales)
 - o If the branch is located in a host retail premises, any access issues on the route to the post office area of the premises
- **Other observations while in the post office**
 - o Any reference to measures designed to improve the consumer experience (e.g. self-service machines, 'meet and greet' queue hosts)
- **Availability of information including**
 - o Opening and closing times
 - o Services available at the branch

In order to meet these research objectives GfK Mystery Shopping, in close collaboration with Citizens Advice, designed a programme of mystery shopping based on a robust sample across all post office branch types and a detailed questionnaire to ensure that the research objectives were met.

3 Methodology

The findings contained in this report are based on a mystery shopping exercise in which mystery shoppers (referred to as shoppers throughout) were instructed to enact a number of scenarios in post office branches, observe, and record their experiences and then feedback the results via a detailed questionnaire. All assessments were covert and, whilst shoppers were instructed to browse in order to observe the presence or absence of a number of interior features, this was not an open audit and therefore the findings reflect obvious and clear sightings only (reflecting the real customer experience).

Shoppers were provided with specific briefing notes and a questionnaire based on the scenarios they were undertaking, allowing them to provide specific feedback on the branch they were assessing.

The fieldwork took place between 24th February and 25th March 2017.

For the first time this study covered the majority of all branch types in the post office network as follows:

- Sub-post offices
- PO Locals (including Local Plus)
- PO Mains
- Crowns
- WHSmith
- Newly franchised Crowns
- Privately managed

As outlined in the Introduction, **sub-post offices** are run by a sub-postmaster or sub-postmistress as a self-employed agent of the Post Office and offer a range of Post Office services, predominantly in branches that are smaller than those on the high street. Since October 2012, sub-post offices have been converted to PO Locals and PO Mains as part of the Network Transformation programme (NTP), although a large number still exist.

The **PO Locals** differ from sub-post offices by providing Post Office services as a secondary offer over a main retail counter, with transactions performed by general retail staff, rather than by dedicated staff at a specific post office counter. They are situated in a wide variety of outlets, which can include convenience stores and petrol stations, and offer Post Office products and services over extended opening hours. Given the differences between the sub-post offices and the PO Local branches, this report compares the provision of services across the two branch types, based on a robust sample size.

PO Mains are typically in some of the largest and busiest town and city centre branches and have dedicated post office counters offering the full range of Post Offices services during standard operating hours (9am to 5:30pm). Where a PO Main is attached to a retail business with longer opening hours, a more limited range of Post Office services is provided at the retail counter outside of core operating hours, in line with the PO Local offering. The majority of PO Mains are hosted in large retailers such as branded chains or independents.

As with the PO Local model, operators of PO Mains are remunerated on a transactional basis (as opposed to a combination of fixed salary and transactional pay) and, therefore, the report aims to compare their performance against both sub-post offices and PO Locals; as well as the other high street branches.

Crown branches are run and managed directly by Post Office Limited and are found on the UK's busy high streets in towns and city centre locations. These branches were included in the sample alongside Crowns which had been franchised to **WHSmith** in 2007-08, **newly franchised Crown** branches (which were franchised during the previous Crown Transformation programme between 2013-2015 to a range of multiple and independent retailers) and **privately managed branches** (large branches operated by independent and established retailers such as the Co-op and Martin McColls) run on a range of contractual arrangements such as a modified sub-post office or as independently or centrally franchised post offices. The aim of assessing these branch types was to understand any differences across the 'high street' network.

As outlined in Section 2.2., the overall research objectives were slightly different for the different branch types; however given the importance of comparing service across the whole network the approach taken was to use a core questionnaire to ensure that these comparisons could be made. In addition, whilst a number of the scenarios (i.e. the mystery shopping enquiries) were consistent across the branch types, different scenarios

were also used to reflect the different services offered across the branch types.

Where appropriate, the findings are compared to previous mystery shopping results – i.e. comparing the PO Local and sub-post office data to the 2016 study, but generally the comparisons are made across branch types based on the 2017 data.

The introduction of all branch types into one study resulted in an overall sample size of 1,813 branches. This was slightly more than the original aim of 1,800 branches due to a slight over-sample. An over-sample is commonly used in mystery shopping to ensure that all assessments are undertaken and is put in place to cover assessments that may be unusable for any reason. In addition, the sample of PO Locals and sub-post offices at 907 was slightly higher than in 2016 where 901 assessments were undertaken.

A slightly different range of scenarios were used, including full-purchases for all postage scenarios (where enquiries may have been made previously). And, finally, a small number of questionnaire changes were made throughout, although the core questionnaire remained largely the same from the previous 2016 study.

3.1 Sample

The results are based on 1,813 mystery shopping assessments of individual post office branches

TABLE 1 NUMBER OF ASSESSMENTS PER BRANCH TYPE

Total	Sub-post Office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
1813	307	600	302	150	162	141	151

As above, the sub-post office and PO Local samples reflected the previous wave of mystery shopping and are robust sample sizes for a mystery shopping study of this nature, as was the PO Main sample (with 302 assessments achieved over the target of 300).

The sample structure also reflected the lower number of Crown and privately managed branches, whilst ensuring a robust sample size of 150 for each (increasing slightly to 151 for privately managed branches due to over-sample). In addition, for branch types with a low number of branches, the decision was taken to assess every branch twice (in the case of WHSmith) and three times in the case of the newly franchised Crowns.

Shoppers were instructed to behave as 'real' customers and undertook a range of scenarios, as outlined below, covering both postal and non-postal scenarios. Shoppers were instructed to undertake a minimum of two scenarios each, resulting in 4,574 scenarios that were assessed overall:

TABLE 2 NUMBER OF ASSESSMENTS PER SCENARIO – POSTAL

Total	Second class large letter	Special Delivery	Royal Mail Signed-For second class	Royal Mail Signed-For small parcel	International parcel
1997	481	477	278	480	281

TABLE 3 NUMBER OF ASSESSMENTS PER SCENARIO – NON POSTAL

Total	Cash Withdrawal	Cash Deposit	Business Deposit	Passport Check	Local Collect	Parcel weight limit
2581	480	682	185	586	463	185

The assessments were spread across times of the day and days of the week; and the data split by a number of factors including post office type, Multiple vs Independents (e.g. McColl, One Stop), rural vs urban and nation. The spread of assessments (and, therefore, the different data cross breaks used) was designed to be representative of the make-up of each branch type within the entire post office network, as well as providing robust sample sizes for analysis purposes.

Shoppers were able to complete their full visit in 1,789 assessments, with 24 (2%) uncompleted visits. 12 shoppers said the branch was closed (even those they visiting during the opening hours shown on the Post

Office website), 7 said the branch was open, but the post office serving position/counters were closed; and in 5 visits the branch was open, but the Post Office services were not available.

Of the 24 branches, 21 were PO Locals, 1 was a privately managed branch and 2 were sub-post offices. In terms of the analysis, the data from these 24 visits relating to the exterior of the branch is still included, however the shoppers were unable to answer any more questions about the interior and how their scenarios were handled.

The sample ensured that assessments covered the following, with the breakdown shown in the tables below:

- All branch types
- All outlet types including multiples and independents (including other smaller outlets)
- All countries (England, Wales and Scotland)
- Days of week and time of day (core and extended hours) within the restrictions of actual opening hours
- Different customer types including gender and age
- A range of scenarios

TABLE 4 BRANCH TYPE BY OUTLET TYPE

Branch Type	Total	Multiples				Independent
		All	Martin McColl	One Stop	Other	
Local	600	162	44	16	102	438
Main	302	146	26	15	105	156
Total	902	308	70	31	207	594

TABLE 5 BRANCH TYPE BY RURAL AND URBAN

Branch Type	Total	Rural	Urban
Sub-post office	307	215	92
Local	600	299	302
Main	302	147	155
Crown	150	4	146
WHSmith	162	N/A	
Newly franchised	141	N/A	
Privately managed	151	134	17
Total	1813	424	477

TABLE 6 BRANCH TYPE BY NATION

Branch Type	Total	England	Scotland	Wales
Sub-post office	307	262	16	29
Local	600	460	92	48
Main	302	257	27	18
Crown	150	138	5	7
WHSmith	162	134	20	8
Newly franchised	141	120	9	12
Privately managed	151	120	21	10
Total	1813	1491	190	132

In addition, shoppers were instructed to undertake their assessment at different times of the day in order to assess service during core hours (9am to 5.30pm Monday to Friday; 9am to 12.30pm Saturday) and extended hours (before 9am Monday to Saturday; after 5.30pm Monday to Friday; after 12.30pm Saturday; anytime Sunday).

TABLE 7 DATE AND TIME OF VISITS

	Morning before 9.00	Morning - 9.00-12.00	Lunch-time - 12.01-14.00	Afternoon - 14.01-17.30	After 17.30	Total
Monday	-	54	61	71	6	192
Tuesday	3	42	41	53	4	143
Wednesday	5	114	80	82	19	300
Thursday	12	147	91	114	18	382
Friday	10	164	104	153	12	443
Saturday	4	245	50	27	4	330
Sunday	-	10	8	5	-	23
Total	34	776	435	505	63	1813

'Extended hours' were only assessed within PO Locals and in total, 147 shoppers undertook 'extended hours' assessments, compared to 455 'core hours'.

Throughout the report, base sizes of less than 30 are indicated as 'low base' and these results can only provide indicative findings.

3.2 Shopper profiles

All shoppers were over 18, did not work for Royal Mail, Post Office Limited or the chain or outlet visited and were not known in the outlet visited. The assessments were undertaken by shoppers across a range of demographic groups, as outlined below; and shoppers were able to undertake more than one assessment.

TABLE 8 SAMPLE BY SHOPPER DEMOGRAPHIC

		Total	England	Scotland	Wales
Gender	Male	46%	38%	5%	3%
	Female	54%	44%	6%	4%
Age	Under 25	4%	4%	0%	0%
	25-34	13%	11%	1%	1%
	35-54	57%	50%	4%	4%
	55+	26%	18%	6%	2%

A small proportion of shoppers (77 in total) considered themselves to have a disability.

3.3 Scenarios

As above, 11 scenarios were conducted, with every shopper instructed to undertake a minimum of two scenarios depending on the branch type they were visiting. The base sizes are shown below in reference to each specific scenario. All mail scenarios were conducted a purchases.

The base sizes for the number of scenarios by branch type are shown at the start of each section specifically analysing both the postal and non-postal scenarios. It is important to note that not all scenarios were conducted in each branch type. This was to reflect the different branch types in terms of how they are staffed, operated and the services and products provided, where issues have been raised in previous waves of mystery shopping research, to provide robust sample sizes and ensure that the project met budgetary restrictions.

3.3.1 Second class large letter

Base Size - 481

Shoppers were instructed to say that they wanted to send a large letter to arrive by the end of next week. They listened to what they were recommended and, if asked, they said that they did not need a signature and the contents of the letter were not valuable. Shoppers were instructed to post their item, unless they were not recommended a second class large letter.

If shoppers were not initially offered the correct postage as the only option they reiterated their needs, asked for a recommendation and recorded what option(s) were provided by the member of staff. If shoppers were still not offered the correct postage they were told not to post the letter.

The scenario was designed to test whether counter staff asked relevant questions and identified the correct postal solution (second-class large letter), this scenario was used across all branch types.

3.3.2 Special Delivery

Base Size - 477

Shoppers asked how to send a letter/card which included vouchers. If asked shoppers were instructed to say that it was essential for the letter to get there by the next day and that the letter contained vouchers worth over £50.

Shoppers were instructed to assess what information was given about delivery times and dates and, if visiting on a Friday, they assessed whether the Saturday guarantee surcharge was mentioned.

All shoppers were instructed to post their item, of which the majority used Special Delivery. However, if recommended otherwise they were permitted not to proceed with the transaction.

The scenario was designed to test whether counter staff asked relevant questions and identified the correct postal solution, this scenario was used across all branch types.

3.3.3 Royal Mail Signed For second class letter

Base Size - 278

This scenario involved shoppers saying that they wanted to send a letter in the knowledge that it would be delivered. Shoppers were instructed to prepare a standard size envelope in order to test staff knowledge and the provision of information. Only if asked, shoppers mentioned that the letter did not need to reach its destination until the end of the following week, that it contained nothing valuable and that they did not require tracking but would like a signature on delivery for peace of mind. If shoppers were not offered Signed For second class postage only initially, they sought a recommendation and/or re-stated their needs to reach the correct product recommendation.

This scenario was only conducted in PO Local and sub-post office branch types.

3.3.4 Royal Mail Signed For small parcel

Base Size - 480

Shoppers were instructed to prepare a small sized parcel in advance and ask counter staff how much it would cost to post the parcel. If asked, shoppers were instructed to state that it's a small parcel which doesn't need to reach its destination urgently, the contents are worth less than £50 but they would like a signature on delivery for peace of mind. If shoppers were not offered second class Signed For small parcel postage only initially, they sought a recommendation and/or re-stated their needs to reach the correct product recommendation.

The scenario was designed to test whether counter staff asked relevant questions, identified the correct postal solution (second class Signed For small parcel) and provided accurate information, this scenario was used across all branch types.

3.3.5 Royal Mail international standard parcel

Base Size - 281

Shoppers were instructed to prepare a small sized parcel in advance, addressing it to someone in France, Germany, Republic of Ireland, Switzerland, Portugal, or Belgium. Shoppers approached the counter and asked how much it would cost to send the parcel. Only if asked, shoppers mentioned that it was not urgent for the parcel to reach its destination, that the parcel weighed between 1-2kgs, did not contain anything valuable or any dangerous, prohibited or restricted goods, and did not require tracking, although they would like a signature on delivery for peace of mind. Shoppers followed a number of routes depending on if they were offered the correct service spontaneously, after questioning or not at all.

The scenario was designed to test whether counter staff asked relevant questions, identified the correct postal solution (Royal Mail International Standard - £5.60) and provided with accurate information.

This scenario was conducted across all post office branch types with the exception of Local and sub-post offices.

3.3.6 Cash withdrawal

Base Size - 480

This scenario was undertaken as a post office transaction and not by using cash-back, unless no other option was available. The shopper asked if they could withdraw cash over the counter using their debit card and instructed not to pay for anything else at the same time with that card. They also asked whether there was any limit on the amount of cash that could be withdrawn and whether it was possible to make deposits at the post office. They withdrew between £20 and £100 and the scenario was designed to test whether the cash withdrawal service was available in branch.

This scenario was only conducted in Local and sub-post office branch types.

3.3.7 Cash deposit

Base Size - 682

This scenario was not conducted at the same time as the cash withdrawal scenario outlined above and was only undertaken by shoppers with an appropriate bank account (i.e. from the following list - <http://www.postoffice.co.uk/branch-banking-services#tab-1>). Shoppers were instructed to withdraw between £50 and £100 prior to visiting the branch and asked at the counter if they could deposit cash into their account. They were also instructed to ask whether there was any limit on the amount of cash that could be deposited and whether there were limits on the number of payments.

This scenario was used across all branch types.

3.3.8 Business deposit enquiry

Base Size - 185

Shoppers enquired whether it was possible to make business cash deposits at the post office. If asked, they said it would be around £2,500-£3,000 every couple of weeks and they were provided with a list of banks to say they used. If not told spontaneously, they asked whether there was any limit to the amount of cash, they could deposit at any one time.

The scenario was designed to test whether customers were provided with correct information about the business deposit service.

This scenario was only conducted in PO Locals.

3.3.9 Passport Check and Send enquiry

Base Size - 586

Shoppers informed the member of staff that their passport is due to expire in about 3 to 4 month's time and were instructed to enquire about whether the branch provided the Passport Check and Send service. Shoppers did not need to complete the applications, but were instructed to assess if staff mentioned the service is available and key aspects of the service, including what the shopper needed to do, how long the process would take and how much it would cost. If the service was not available, shoppers recorded if staff mentioned any alternative branches to access the service.

This scenario was used across all branch types.

3.3.10 Local Collect

Base Size - 463

Shoppers were instructed to tell the member of staff they had received a red 'something for you' card and wondered whether they could have the parcel re-delivered to that post office branch. If shoppers were not asked about the contents and size of the parcel, they were instructed to say that it was a pair of trainers, the size of a small parcel.

Shoppers were instructed to ask further questions about re-arranging the re-delivery including restrictions and ID requirements; if the staff member said it was possible to have the item re-delivered.

This scenario was used across all branch types.

3.3.11 Collecting an item purchased via Amazon

Base Size - 463

All shoppers who undertook a Local Collect scenario were also instructed to ask if it was possible to have items purchased via Amazon to be delivered to that post office branch.

Shoppers were instructed to assess whether information was provided about alternative locations (if they were told the branch did not accept deliveries) or whether the staff mentioned size and weight limits (if deliveries were acceptable).

This scenario was used across all branch types.

3.3.12 Weight limit enquiry

Base Size - 185

Shoppers were instructed to say that they were a frequent user of eBay and would like to use the post office to send out packages to other locations in the UK. If asked by the member of staff, shoppers were instructed to say the parcels would usually be between 7 and 15kgs, that nothing restricted or prohibited would be contained and that the parcels would not be larger than 61cm in length, 46cm wide and 46cm in depth.

If not mentioned, shoppers were instructed to prompt about the weight limit and maximum size.

Full details relating to each scenario are provided in the shopper briefing instructions within the appendices.

This scenario was only conducted in Local and sub-post office branch types.

4 Non Scenario Specific Findings

4.1 Visit issues

2% of shoppers were unable to complete their visit (24 out of 1,813), broken down as follows:

- 12 shoppers said the branch was closed, even though they visited during the opening hours shown on the Post Office website (with photographs provided as evidence).
- 7 said the branch was open, but the post office service position / counters were closed.
- 5 said the branch was open, but the Post Office services were not available.

Of the 24 branches that could not be assessed, 21 were Locals, 2 were sub-post offices and one was privately managed. Shoppers were asked to explain their answers as follows:

Newly franchised Crown	There was a sign which read, 'DUE TO STAFF SHORTAGES XXXXX POST OFFICE WILL BE CLOSED MON-THURS 12-2'.
Sub-post office	The website said the branch was opened from 09:00-5:30 on Thursdays. When I arrived it was closed for lunch.
Sub-post office	The branch appeared to be temporarily closed with a hand written sign in the window to display this..
PO Local	A member of staff said post office staff had not been working for approximately two weeks, so no services were available in the branch.
PO Local	I was informed that the member of staff who worked at the post office had to leave early to go home.
PO Local	The convenience retail outlet section was opened but the post office was closed. The hours shown on the Post Office website stated opening hours as 07:00-20:00 Monday to Friday but the sign propped against the counter said, 'post office Closed.' There was a further sign which stated that from August the post office would close at 5:30 each day. I asked a member of staff who confirmed they no longer opened late since August last year.
PO Local	The Post Office website stated opening hours were 08:00 - 20:00 and the assignment stipulated visiting after 17:30. I visited at 17:48 and although the Co-op was opened the post office section was closed.
PO Local	I checked with the website and GfK regarding the opening hours. I was told to visit before 9am or after 5.30pm on a weekday or 9am to 12.30pm on a Saturday. When I arrived I went to the post office counter to be served. There were no opening hours advertised so I asked the member of staff. I was told the opening hours were 9am to 5.30pm weekdays, 9am to 12.30pm on a Saturday and closed on Sunday. It was therefore impossible to visit during the time restrictions.
PO Local	I arrived at the branch at 18:38, which was supposed to be opened until 19:00. The owner told me he closed early and now all the money was in the safe. He did not keep the post office opened late even though it was supposed to be opened until 19:00. During this time his colleague was closing all of the shutters to the store.
PO Local	The branch's opening hours were listed as 07:00 - 22:00 Monday to Sunday on the Post Office website (I have a screen grab of this), but when I arrived at the branch and got to the front of the queue, the member of staff told me that the post office branch was not open on a Sunday, and that it only opened at the weekends on a Saturday until 13:00.

PO Local	The only post office position had a sign stating that it was closed. The member of staff seemed to be checking the cash balance.
PO Local	There was a hand written sign on the window partition at the counter. It read 'Post office temporarily closed, Nearest DVL Trimdon post office'.
PO Local	The counter designated for the post office (as marked by a banner hanging from the ceiling and posters attached to the front of the counter) was open. When I arrived at the front of the queue and produced my letter the member of staff asked, "Are you here for the post office?" I stated, "Yes", and in response they informed me that, "The post office is not open today".
PO Local	The shop and post office were both closed, and there was a sign in the window saying that the shop was closed.
PO Local	The Post office website said Sundays were open 06:00 to 13:00. I arrived at 12:20, but the branch was closed and the opening hours displayed outside showed it was closed on Sundays.
PO Local	I arrived and was at the door for 17:58, but a member of staff pulled a shutter half down to stop me entering.
PO Local	I went into the shop and asked if the post office was open. I was asked what I wanted. I told the member of staff I needed to sent a letter Special Delivery. The member of staff said they were not able to do that and suggested I return at 09:00 when the post office member of staff was there.

As a consequence of these 24 visits, the overall base size has been reduced to 1789 for all analyses relating to the **interior** of the branches and the **scenario specific** elements.

4.2 Exterior - signage, facilities and access

4.2.1 Facilities and signage

Shoppers were asked to comment on whether a post box was outside or within sight of the branch, with some differences by branch type. Indeed, in less than half of assessments (45%) to newly franchised branches, shoppers noted a post box either outside or within sight of the branch.

TABLE 9 WHETHER A POST BOX WAS OUTSIDE THE BRANCH

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1813	307	600	302	150	162	141	151
Yes – Post Box Visible	73%	83%	69%	77%	91%	66%	45%	75%
No	27%	17%	32%*	23%	9%	34%	55%	25%

*Over 100% during rounding

Shoppers recorded if there was any external signage indicating there was a post office, the range of services provided and the opening hours.

TABLE 10 POST OFFICE SIGNAGE OUTSIDE THE BRANCH

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1813	307	600	302	150	162	141	151
Post office sign or logo	98%	97%	99%	99%	100%	99%	99%	96%
Opening hours - prominent	78%	71%	69%	82%	96%	90%	84%	78%
Reference to PO services	69%	46%	70%	73%	82%	83%	87%	64%

Overall, 78% of shoppers stated that the opening hours were displayed, but not prominently in 4% of assessments and no opening hours were displayed in 18% of assessments overall (increasing to 26% in both Locals and sub-post offices). Where opening hours were displayed (either prominently or not), 5% of shoppers stated that the advertising opening hours did not match those shown on the Post Office website. This was highest in PO Locals at 8%.

TABLE 11 POST OFFICE SIGNAGE OUTSIDE THE BRANCH

Did the advertised opening hours match the Post Office website?	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits where opening hours displayed	1481	228	446	259	146	151	129	122
No	5%	5%	8%	5%	1%	1%	7%	3%
Yes	95%	95%	92%	95%	99%	99%	93%	97%

It is, therefore, important to understand why there is a disconnect between the opening hours on the website and the opening hours advertised by the branch.

Overall, shoppers could not see any reference to specific Post Office services in the branch exterior in 31% of assessments, increasing to 54% in sub-post offices. Where Post Office services were displayed, certain services were more prominent than others, as follows:

- Cash and banking services – 63%
- Bill payments – 54%

- DVLA / car tax applications – 37%
- Passport applications – 28%

Across all service types, sub-post offices were least likely to display information externally including 41% displaying information about cash and banking services, 27% bill payments, 18% DVLA / car tax applications and 8% passport applications.

4.2.2 Access to outlet vicinity

Firstly, it is important to note that in 92% of assessments shoppers described the exterior of the branch they visited as being clean and well maintained. The best performing branch types were WHSmiths (96%) and Crowns (95%) compared to sub-post offices and privately managed branches where only 89% and 88% of shoppers respectively reported the exterior being clean and well-maintained.

Those shoppers visiting branches within the high street Network (e.g. excluding Locals and sub-post offices) were asked whether there was more than one entrance; and 21% overall reported that this was the case increasing to 36% assessing WHSmith branches.

There were differences in the proportion of branches where parking was available nearby (i.e. within 100 yards). In less than half of the assessments for WHSmith (where all branches were assessed), newly franchised Crowns (where all branches were assessed) and Crown branches (where just under half of all branches were assessed) there was no parking available nearby; but it should be noted that the majority of these branches were located in town or city centres.

In addition, where there was parking available, these three branch types were least likely to be near parking where the parking was free and had no time limits.

However, for disabled customers, a higher proportion of blue badge bays were reported in the parking facilities close to WHSmith and newly franchised branches.

TABLE 12 PARKING FACILITIES

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1813	307	600	302	150	162	141	151
Parking available nearby	70%	79%	81%	81%	48%	38%	45%	68%
Where parking available	1274	241	488	246	72	61	63	103
Free parking / no time limits	60%	72%	79%	57%	14%	3%	16%	35%
Free parking with time limits	27%	24%	17%	34%	42%	34%	38%	50%
Pay and display	18%	6%	7%	14%	60%	64%	52%	34%
Blue badge bays	37%	24%	23%	42%	57%	70%	71%	64%

4.2.3 Exterior access to outlet

The branches were also assessed to establish the availability of features for customers with disabilities or impairments.

TABLE 13 ACCESS FOR DISABLED CUSTOMERS

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1813	307	600	302	150	162	141	151
Electronic door (s)	38%	12%	27%	40%	67%	69%	80%	30%
(At least one) entrance wide enough for wheelchair access	91%	79%	88%	94%	99%	99%	100%	97%
Either no ramp required or a ramp in place	81%	66%	77%	86%	88%	92%	91%	83%
A wheelchair lift	2%	>0%	1%	1%	3%	15%	2%	1%
A handrail for disabled customers	21%	21%	17%	19%	38%	24%	17%	21%
Low-level door buzzer	13%	7%	12%	18%	23%	12%	13%	14%

Firstly, only 12% of sub-post offices had electronic doors, compared to as high as 80% in newly franchised Crowns. In addition, over one in five (21%) sub-post offices did not have at least one entrance that was wide enough for wheelchair access, compared to every newly franchised branch that did. Overall, any customer visiting a Crown (99%), WHSmith (99%), newly franchised (100%) or privately managed branch (97%) was extremely likely to encounter a wide enough entrance, compared to a lower proportion visiting a sub-post office (79%) or Local (88%).

Shoppers were asked whether they thought a wheelchair ramp was required and, if so, whether a ramp was in place. A third of shoppers assessing sub-post offices said that a ramp was needed, but was not available. This coincides with the 36% saying there was not a flat entrance to the branch and, therefore, indicates a potential problem with access.

Shoppers were also asked to comment on the availability of a wheelchair lift, however this facility was available in only 2% of branches across the network; although a lift was available in 15% of WHSmith branches. In the small number of cases where a lift was available (43 assessments), 33% said there was no sign relating to further assistance and in 21% of cases the lift did not appear to be working. This 21% equates to 9 sites, which included 4 PO Locals, two PO Mains, one Crown, one newly franchised Crown and one sub-post office.

There were also differences in the availability of hand-rails (as high as 38% in Crown branches, but falling to 17% in Locals and newly franchised branches) and in the provision of a low level buzzer or bell (available in 23% of Crown branches, but only 7% of sub-post offices).

Finally, when assessing wheelchair access overall, it is vital that the entrance is wide enough (which was not the case in 9% of assessments); however it is also important that access to the entrance is also possible. In 76% of assessments where the entrance was wide enough, the approach was flat and in 9% of assessments the approach was not flat, but a ramp was in place.

As such, in 2% of cases where the entrance was wide enough, the entrance was not flat and no ramp was in place; although other 'access elements' (such as a lift, handrail or buzzer) were available. In 4% of cases these were not available.

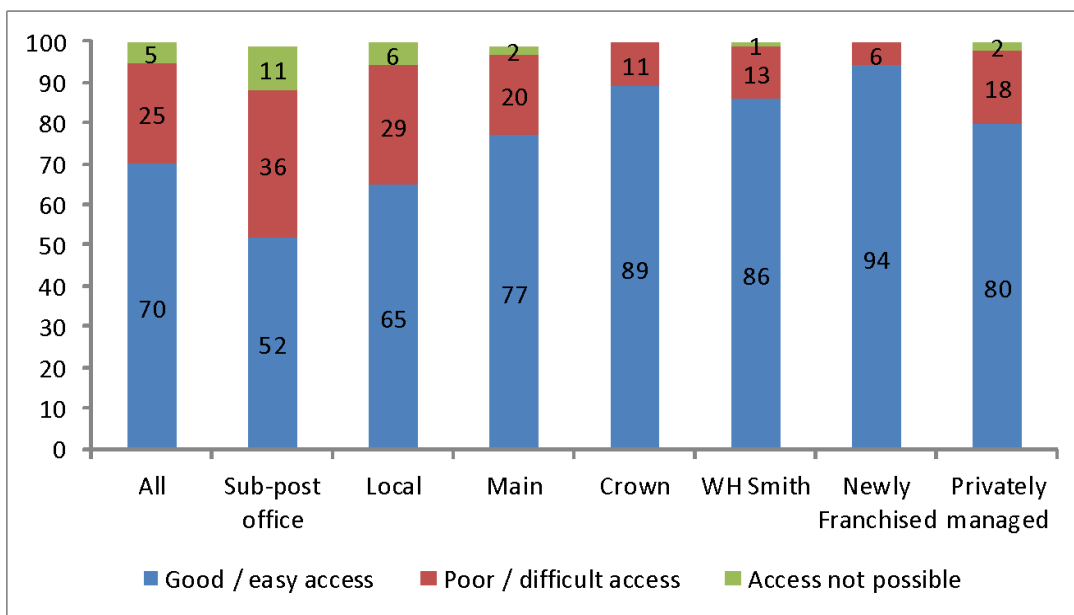
TABLE 14 ACCESS FOR DISABLED CUSTOMERS COMBINED

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1813	307	600	302	150	162	141	151
Entrance wide enough for wheelchair access and flat	76%	57%	69%	81%	87%	94%	96%	83%
Entrance wide enough for wheelchair access, entrance not flat, but ramp present	9%	11%	11%	7%	9%	4%	4%	9%
Entrance wide enough for wheelchair access BUT entrance not flat and ramp not present. However, other access elements WERE present*	2%	3%	6%	3%	1%	0%	0%	2%
Entrance wide enough for wheelchair access BUT entrance not flat and ramp not present. NO other access elements present*	4%	8%	2%	2%	2%	1%	1%	3%
(At least one) entrance NOT wide enough for wheelchair access	9%	21%	12%	6%	1%	1%	0%	3%

*Other access elements defined as wheelchair, handrail and / or low-level buzzer or bell.

These differences in the provision of facilities for disabled customers (particularly those in wheelchairs) are highlighted in the accessibility ratings given by shoppers, as follows:

CHART 1 ACCESSIBILITY RATING BY BRANCH TYPE



Those branches with the better access facilities (e.g. Crowns and newly franchised) were rated as good by the majority of shoppers; whereas those branches with less facilities (e.g. sub-post offices) were much more likely to be rated as poor, with 11% of shoppers visiting a sub-post office indicating that access was not possible.

4.3 Interior - signage, facilities and access

The analysis of the interior is based on 1,789 successfully completed assessments – i.e. excluding the 24 shoppers who were unable to undertake a full assessment because they could not access the Post Office services.

4.3.1 Interior access

Overall 90% of shoppers stated that the post office counters were located on the ground floor, with 19 branches (2%) locating their counters in the basement and 74 (8%) on the first floor or higher.

TABLE 15 COUNTER LOCATION BY BRANCH TYPE

All visits	All	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	905	302	150	162	141	151
Ground floor	90%	99%	96%	56%	95%	96%
First floor or higher	8%	>0%	3%	37%	4%	2%
Basement	2%	>0%	1%	7%	1%	2%

This included 6 WHSmith branches (equating to 12 assessments in total) with counters in the basement and 15 (equating to 30 assessments in total) with counters on the first floor or higher. Excluding WHSmith, only 21 branches did not have counters on the ground floor (1% overall).

For those branches where the counters were not on the ground floor (n=93), 75% had an internal lift, meaning that in a quarter of these branches it would have been difficult for wheelchair users to access the floors with the Post Office services.

Breaking this down further, 3 of the 6 Crown branches on another floor had a lift, compared to 4 out of 7 Franchised Crown branches and 1 out of 6 privately managed branches. Neither of the 2 Main branches on another floor had a lift; however 62 of the 72 WHSmith branches on another floor (86%) did have a lift.

Where a lift was available (in 70 branches) a number of questions were asked:

- The lift was working – 100%
- Big enough for a wheelchair – 99% (although only 68% big enough for a mobility scooter)
- Lift included low-level controls – 94%
- No obstruction to the lift – 94%
- Life controls adapted to the needs of visually impaired customers – 81%
- A sign on or near the lift offering further assistance – 67%

Overall, 13% of shoppers reported that there were no aisles. Where there were aisles reported (1,553 assessments) 7% of shoppers reported that they were not wide enough for wheelchair / pushchair / mobility scooter access) and 5% stated that there were obstacles which could prevent or impede wheelchair access, with differences by branch type highlighted below:

TABLE 16 AISLE RELATING INFORMATION BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All completed visits	1789	305	579	302	150	162	141	150
Aisles reported in branch	87%	77%	87%	90%	87%	95%	96%	83%
All branches with aisles	1553	235	501	273	131	154	135	124
NOT wide enough for a wheelchair / pushchair / mobility scooter	7%	13%	9%	6%	1%	2%	3%	5%
Obstacles preventing or impeding wheelchair access	5%	10%	4%	4%	1%	3%	2%	5%

In 12 assessments (less than 1%) shoppers stated that the aisles were not wide enough and that there were obstacles.

Shoppers were asked to provide additional information where the aisles were not wide enough or there were obstacles, with examples shown below:

Examples of comments relating to aisles not being wide enough for wheelchairs / pushchairs / mobility scooters:

PO Main	The route for queuing had free standing posters that obstructed some of the floor, meaning there was a narrow pathway. My wheelchair was more difficult to manoeuvre because of this and I would suspect a wheelchair would be worse.
PO Main	The queuing system was not wide enough.
PO Main	The aisles were just a bit too narrow for wheelchair users and definitely not wide enough for mobility scooters.
PO Main	I felt you could pass through the aisles but certainly not easily. The passageway leading away from the main counter was not wide at all and could result in knocking items from shelves. I think a pushchair would have difficulties and a wheelchair user would find it more difficult. A mobility scooter would have great difficulties turning particularly by the main counter. I felt that this branch was not access friendly.
PO Local	The aisles were quite narrow and would be awkward for two people to pass and not wide enough for a scooter and only small pushchairs.
PO Local	I would describe as state bus for a wheelchair/pushchair/mobility scooter space on a bus.
PO Local	It felt cramped near the post office section, a wheelchair would struggle.
PO Local	The aisles were too small to accommodate a wheelchair.
Sub-post office	The aisles were very narrow, with little turning space.
Sub-post office	I am unsure whether a wheelchair/pushchair/mobility scooter could pass through the aisle to the counter as it appeared very narrow. This may have been due to the fact that shelving bordered both sides of the aisle.
Sub-post office	The aisles seemed to be too small to accommodate a wheelchair user.
Sub-post office	There were displays of stationery in the centre of this small branch and I felt it would be difficult for a wheelchair user to navigate.

Examples of comments relating to aisles with trip hazards:

PO Main	There were not a lot of boxes, but there were some that could have gotten in the way of an already narrow pathway.
PO Main	There were some boxes near the queue line that would have restricted access for people with a wheelchair.
PO Main	The aisles were full with postcard stands, boxes, and shelving.
PO Main	A wheelchair user has to navigate a supermarket aisle to reach the post office which is located at the back of a Tesco Metro store. The most obvious possible obstruction would be other shoppers.
PO Local	It was a very small and narrow branch which a wheelchair would struggle around.
PO Local	There was stock in baskets in front of racks on the floor.
PO Local	They appeared to be restocking the shelves and there were boxes blocking one of the aisles.
PO Local	There were close aisles with retail products stocked.
Sub-post office	There was a large stack of Walkers Crisps next to the counter which was making the aisle narrower than usual.
Sub-post office	There were large pieces of cardboard on the floor which appeared to have been deliberately placed there (presumably to prevent people slipping) - however I found these to be trip hazards in themselves, and looked highly unprofessional. The branch would look better if it had proper mats in place instead.
Sub-post office	Two boxes were left on the floor and it might be difficult turning the corners of the aisles with a motor scooter.
Sub-post office	There were items placed near the walls which would impede a wheelchair or pushchair.

4.3.2 Interior signage

Official posters, leaflets of other signs /logos relating to Post Office services were noted in 77% of branches.

TABLE 17 INTERIOR SIGNAGE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Official Post Office posters, leaflets or other signs / logos	77%	70%	71%	82%	85%	83%	89%	79%
Handmade leaflets / posters about Post Office services	5%	9%	4%	8%	3%	3%	6%	4%

Whilst the prevalence of official posters and signs is based on both shopper observation and interpretation, it is clear that Post Office signs were more prevalent in newly franchised, Crown and WHSmith branches. In addition, only 70% of shoppers said they observed official Post Office posters / signs in sub-post offices, whilst there were a higher number of hand-made leaflets and posters seen (9%).

In the 95 assessments where hand-made leaflets were seen, a range of different notices were recorded:

PO Main	There was an A4 piece of paper telling customers to buy the envelopes at the WHSmith counter, before going to the post office counter.
PO Main	There was one outside and one by the counter about gas and electric top ups. I took a photo if further detail is required.
PO Main	Above one of the counters, filled out by hand, was today's exchange rate, dollars to pounds.
PO Main	There were leaflets about travel insurance and the new Post Office credit card. In a corner of the post office there were shelves stocked with forms to fill in for services such as, the renewal of a driving licence.
PO Local	Bold letters in the window offering Car Tax Services and Passport Photos
PO Local	There were posters indicating useful information.
PO Local	Post office opening times were displayed on unofficial notices.
PO Local	A printed notice asked customers who required the post office to queue at the 'post'. The post had a sign on it 'Please queue here'.
Sub-post office	The notice giving times on the front door was hand written.
Sub-post office	This related to postal information and restrictions for postage to Pakistan, India and Bangladesh.
Sub-post office	Cash withdrawals available
Sub-post office	These were Parcelforce leaflets.

Shoppers were also asked to comment on availability of specific items, as follows:

TABLE 18 AVAILABILITY OF SPECIFIC ITEMS

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
A freestanding PIP* template	70%	70%	59%	74%	81%	88%	68%	81%
Our services and our prices leaflet/s	69%	63%	58%	78%	78%	87%	74%	70%
Dangerous goods leaflets	64%	57%	51%	72%	79%	77%	79%	67%
Parcel box guide	48%	40%	33%	50%	77%	65%	57%	57%

*Royal Mails Pricing in Proportion (PiP) template is a tool used to calculate prices for letters, large letters, packets and parcels.

Whilst certain items were more common than others across the network, all items were less prominent in sub-post office and PO Local branches.

4.3.3 Facilities for disabled customers

Shoppers were instructed to assess the availability of various disabled facilities within the branch interior.

TABLE 19 INTERIOR FACILITIES FOR DISABLED CUSTOMERS BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Low level counter position	47%	26%	29%	46%	54%	70%	79%	47%
Low level scales	37%	18%	29%	46%	47%	64%	55%	35%
Low level writing desk or shelf	41%	24%	19%	57%	63%	67%	75%	43%
Hearing loop	41%	22%	32%	61%	46%	51%	67%	35%
Portable PIN pads	61%	45%	62%	64%	67%	72%	68%	55%
Signs showing where disabled people could get help / be served	13%	4%	11%	17%	19%	16%	23%	13%

As indicated previously, sub-post offices were least likely to provide specific facilities for disabled customers within the branch. In contrast, WHSmith branches were most likely to have low level scales and portable PIN pads, whilst newly franchised branches were most likely to have low level counter positions, low level writing desks, hearing loops and signage for disabled people.

Finally, shoppers reported that seating was available in 21% of branches increasing to 67% in Crown branches and 48% in newly franchised Crowns; but falling to 5% in sub-post offices and 3% in Locals.

Of the 367 branches with seating, 66% of shoppers said that all seats were available, with only 4% stating that all seats were occupied.

4.4 Counters and self-service machines

Shoppers reported that 91% of the branches visited had dedicated / screened post office counter position, with the average number of counters recorded as 3.0 including 1.4 counters closed on average. There were differences by branch type, as below:

- Crown – 4.5 counters overall / 2.4 closed
- WHSmith – 4.1 counters overall / 2.1 closed
- Newly franchised Crowns – 3.6 counters overall / 1.8 closed
- Privately managed – 3.3 counters overall / 1.6 closed
- PO Main – 2.3 counters overall / 1.0 closed
- Sub-post office – 1.7 counters overall / 0.5 closed
- PO Local – 1.2 counters overall / 0.2 closed

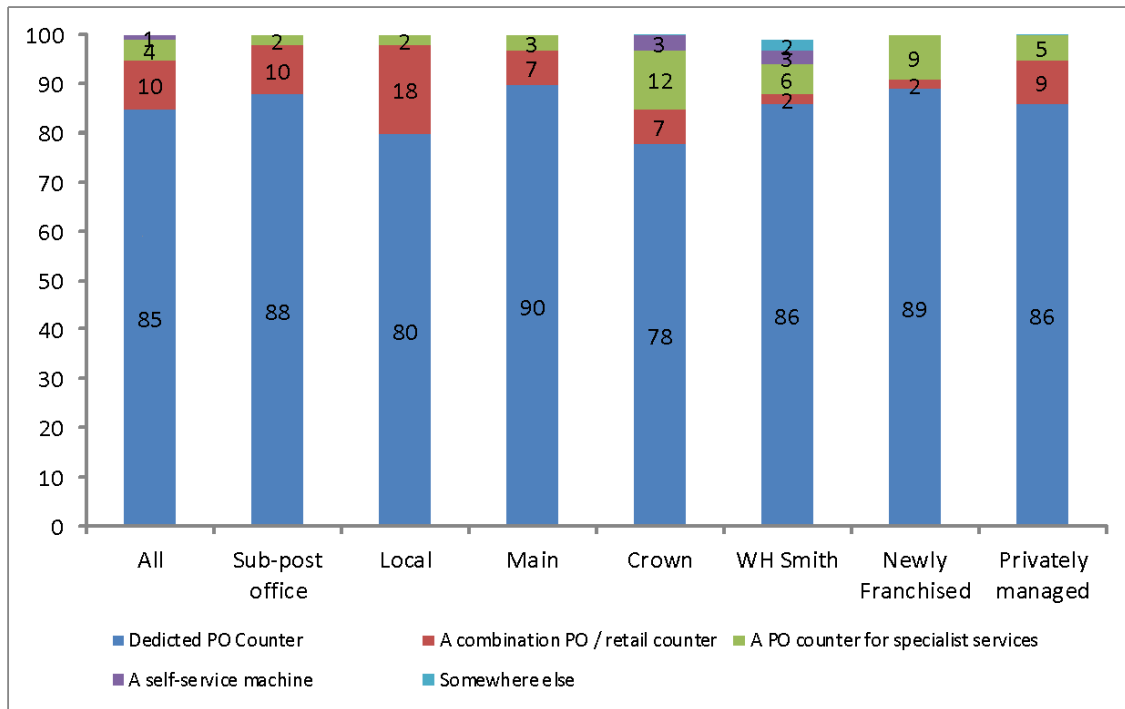
Therefore, Crown and WHSmith branches were likely to have the most counters, however on average over half of those counters were closed when the shoppers made their assessment. Although sub-post offices and PO Locals had fewer counters on average, only a small proportion were closed.

Overall, WHSmith and Crown branches were most likely to have at least one closed counter position (96% and 93%), however these two branch types generally have the highest number of counters. PO Locals were least likely to have at least one counter position closed (23%), but they also had the lower number of counters on average.

6% of shoppers said it was not easy to identify the different types of counter position. In many cases this was because all the counters appeared to be the same.

Shoppers made their enquiry at a variety of service points, but predominantly at a dedicated post office counter position:

CHART 2 POINT OF ENQUIRY / TRANSACTION



Shoppers were instructed to use the counter position unless the staff member instructed them to use the self-service machine; however, they were not permitted to use the machine without the support of a staff member.

In the majority of cases the shopper used the dedicated post office counter position.

In 15% of assessments there was only one counter in the branch. In 85% of visits in which there was more than one counter, only 37% of shoppers noticed signage aimed at helping people decide which counter to go to, with differences by branch type as outlined below:

TABLE 20 COUNTER-RELATED SIGNAGE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
More than one counter	85%	73%	73%	46%	94%	99%	96%	99%
All branches with more than one counter	1521	222	420	285	149	161	136	148
Proportion of branches with more than one counter with signage	37%	21%	48%	22%	49%	51%	43%	26%

WHSmith, Crown and PO Local branches were more likely than sub-post office and Main branches to have signage. Examples of signage are indicated

PO Main	The screened position was easy to identify and was labelled, as was the Bureau de Change.
PO Main	The Travel counter was clearly separate from the other counters.
PO Main	There was a ticket system for counter services or more specialist services. There was

	also a member of staff directing people to the self-service machines if appropriate.
PO Main	There was a 'Travel' signage.
PO Local	There was a large sign attached to the ceiling above the post office counter. The counter had a small rope next to it which marked it as different to the other counters.
PO Local	The post office counter had signs above stating this was a post office cashiers point.
PO Local	There was a sign over the counter indicating it was for the post office.
PO Local	Post office signage was located above the post office counter.
Sub-post office	The post office counters were clearly separate from the grocery counter.
Sub-post office	There were signs above one post office counter indicating that it was for money change services.
Sub-post office	The post office counters were directly in front of the entrance to the branch.
Sub-post office	There was signage above the post office counters at the rear of the branch.

Shoppers also highlighted a number of features to facilitate counter usage:

TABLE 21 FACILITIES RELATING TO COUNTERS AND QUEUEING

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Physical indicators showing free counters (e.g. overhead lights / numbers)	23%	2%	1%	6%	83%	75%	65%	27%
Spoken announcements	19%	1%	>0%	4%	79%	67%	50%	19%
Queue indicators (e.g. lines on the floor)	34%	8%	10%	42%	62%	80%	77%	49%

The Crown branches were most likely to have physical indicators at the counters and spoken announcements, whilst WHSmith branches were most likely to have queue indicators. Sub-post offices and Local branches were least likely to have these facilities.

All shoppers, excluding those assessing a Local or sub-post office were asked to assess whether there were any self-service machines within the branch. Of the 905 shoppers asked this question, 185 shopper (20%) reported seeing self-service machines.

The majority of which were in Crown branches (58% with self-service machines) and WHSmith branches (43% with self-service machines). Only 16% of newly franchised Crown branches, 3% of privately managed and 1% of all Main branches had self-service machines.

TABLE 22 COUNTER-RELATED SIGNAGE

	All	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	905	302	150	152	141	150

Self-service machines available	20%	1%	58%	43%	16%	3%
All branches with self-service machines	185	2	87	70	22	4
Proportion of branches where ALL self-service machines appeared to be working	91%	*	95%	84%	*	*
Proportion of branches where ALL self-service machines had a parcel box guide	76%	*	77%	71%	*	*
Proportion of branches with self-service machines where staff were clearly available to help	75%	*	85%	79%	*	*

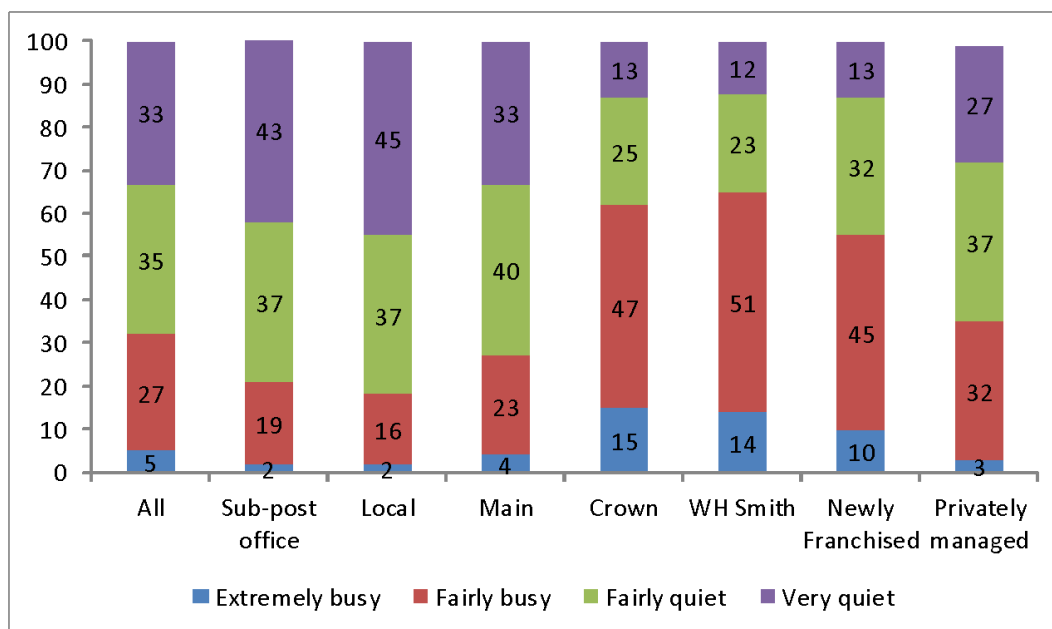
*Analysis on Mains (n=2), newly franchised branches (n=22) and privately managed (n=4) not shown due to small base sizes.

In the 9% of cases where not all the machines were working (n=17), 7 had 'out of order signs' on all machines, 2 had some 'out of order signs' and 8 said there was no explanation.

4.5 Waiting and queuing

Overall, shoppers reported varying levels of 'business' as outlined below:

CHART 2 THE LEVEL OF BRANCH TRADE



Shoppers were more likely to encounter extremely or fairly busy branches in Crown and WHSmith assessments, whereas the sub-post office and Local branches were more likely to be quiet.

TABLE 23 LEVEL OF TRADE BY TIME OF DAY

	All	Before 9am	9am – 12am	12pm – 2pm	2pm – 5.30pm	After 5.30pm
All Visits	1789	32	772	429	499	57
It was extremely busy	5%	3%	4%	6%	6%	2%
It was fairly busy	27%	19%	27%	31%	25%	12%
It was fairly quiet	35%	38%	35%	30%	38%	40%
It was very quiet	33%	41%	33%	32%	31%	46%

*Low base / **Rounding

As above, the busiest time of the day was lunchtime (12pm – 2pm) with 37% of shoppers reporting that the branch was extremely or fairly busy.

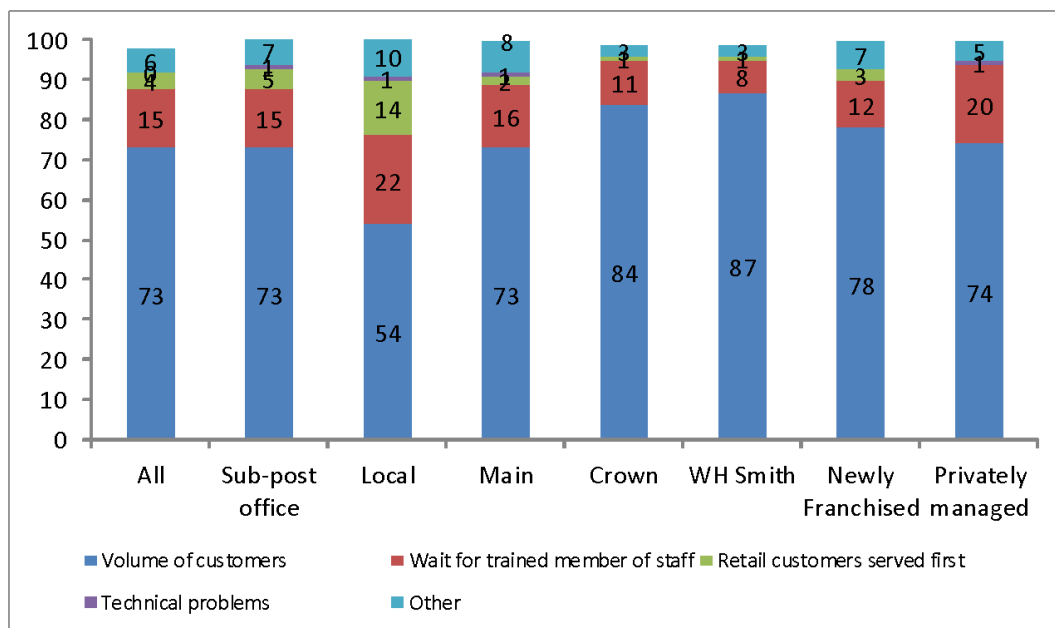
For those branches that were very quiet, it would be expected that little or no queuing was required and, as such, a lower proportion of customers waited in sub-post office and Local branches:

TABLE 24 PROPORTION OF SHOPPERS WHO HAD TO QUEUE/WAIT

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Was not served immediately	49%	42%	32%	48%	62%	80%	77%	49%

For those who did have to wait, a variety of reasons were given, although the majority of customers cited the volume of customers, as below:

CHART 3 REASONS FOR WAITING/QUEUING



The overall average waiting time was 3 minutes 21 seconds (3.21). The longest average waiting time was experienced in a WHSmith on a Saturday morning, where the shopper waited for 56 minutes.

The overall average transaction time was 4 minutes 27 seconds (4.27), with the longest transaction time taking 30 minutes at a Crown on a Saturday morning.

TABLE 25 WAITING TIME AND TRANSACTION TYPE BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Waited / queued	49%	42%	32%	48%	62%	80%	77%	49%
Average wait time to be served (minutes/seconds)	3.21	2.48	2.31	2.56	4.12	4.44	3.39	3.20
Average transaction time (minutes / seconds)	4.27	4.23	4.56	3.46	4.32	4.16	4.14	4.21

The data indicates that whilst waiting times did differ by branch types (shortest in PO Locals and longest in WHSmith branches) the transactions times were largely consistent, with the exception of PO Mains where the average was lowest.

Waiting and transactions times also differed by day of the week and time of day, as follows, with the longest waiting times on Tuesdays and during the afternoon. Transactions times did not differ greatly by day of week or time of day:

TABLE 26 LEVEL OF TRADE BY DAY OF WEEK

	All	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
All visits	1789	189	140	300	378	441	322	19*
Had to wait or queue	49%	60%	50%	49%	43%	49%	49%	37%
Average wait time to be served (minutes / seconds)	3.21	3.31	3.43	2.59	3.12	3.31	3.26	1.50
Average transaction time (minutes / seconds)	4.27	4.13	4.39	4.14	4.22	4.29	4.43	4.02

*Low base

TABLE 27 LEVEL OF TRADE BY TIME OF DAY

	All	Before 9am	9am – 12am	12am – 2pm	2pm – 5.30pm	After 5.30pm
All visits	1789	32*	772	429	499	57
Had to wait or queue	49%	38%	48%	54%	47%	33%
Average wait time to be served (minutes / seconds)	3.21	1.58	3.12	3.28	3.37	2.42
Average transaction time (minutes / seconds)	4.27	5.08	4.27	4.17	4.24	5.32

*Low base

Overall 49% of shoppers (n=873) said they had to wait, of whom 143 said they had to wait, but there was no queue (e.g. they were waiting for a staff member) and 730 said they had to queue. The 730 shoppers who had to queue were asked to comment on why they believed they had to queue:

TABLE 28 REASONS FOR QUEUING

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits where shopper waited	873	129	185	146	115	119	95	84
Volume of customers in the outlet	73%	73%	54%	73%	87%	87%	78%	74%
Had to wait for a trained member of staff	15%	15%	22%	16%	11%	8%	12%	20%
Retail customers served first	4%	5%	14%	2%	1%	1%	3%	0%
Technical problems	<1%	1%	1%	1%	0%	0%	0%	1%
Other	6%	7%	10%	8%	1%	3%	7%	5%

55 shoppers gave 'other' reasons for waiting, with an example of the verbatim comments shown below:

One member of staff was sitting, with the position closed, chatting to a colleague. The member of staff serving was extremely slow.
The two members of staff were talking for a while before I was helped.
The sole member of staff was conducting a personal conversation with a customer. This was obvious from the familiarity of, and the content of, the conversation.
The member of staff ignored me and continued a private conversation with a colleague on the shop floor. I had to break the conversation and ask to be served.
Although there were five counters and none of them had "closed" signs up, only three counters were staffed.
Insufficient counter positions were open given the branch was busy.

Only one post office counter was open initially and then a second opened up for me to use.

Shoppers who had to queue documented if there were any measures in place or staff were doing anything to proactively manage or reduce the queue:

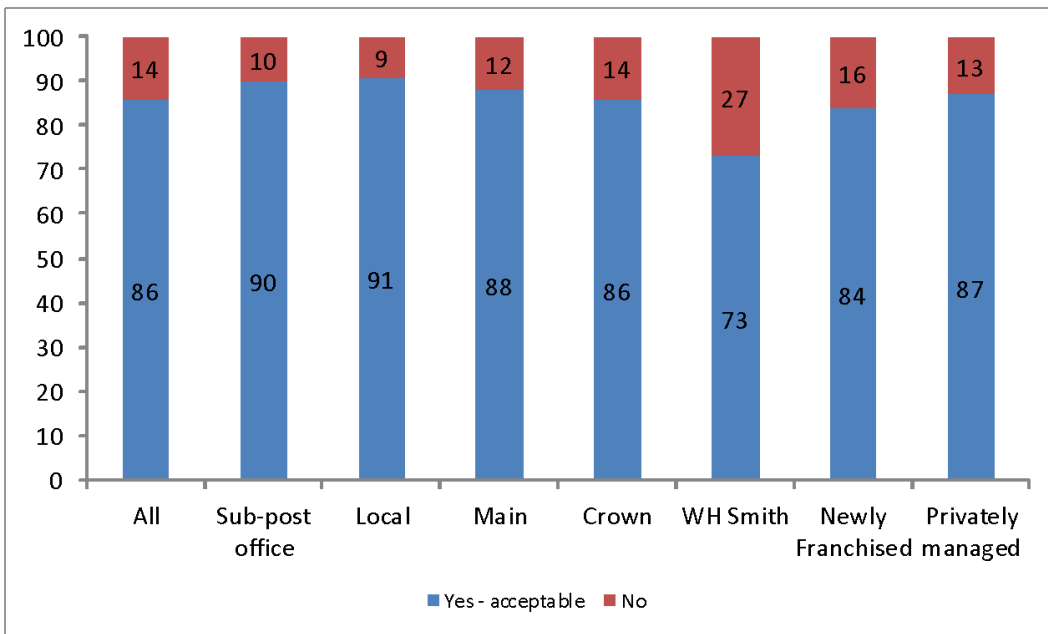
TABLE 29 FACTORS TO FACILITATE QUEUING

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits where shopper queued	730	111	124	122	110	110	84	79
Ticket queuing system	2%	0%	0%	0%	17%	0%	1%	0%
Separate queue for post office and Retail transactions	38%	39%	53%	43%	9%	37%	51%	27%
Staff proactively managing / helping customers in the queue	22%	10%	21%	12%	36%	36%	19%	20%
Additional counter positions opened	15%	8%	9%	14%	22%	15%	17%	19%
Automated queue management devices	20%	0%	0%	2%	53%	46%	42%	10%

In the 18 assessments where a ticket queuing system was in place, 7 shoppers stated that a member of staff was present at the dispenser to ask if customers needed help.

Overall, 86% of shoppers said that the time they queued or waited to be served was acceptable. Differences were minimal by branch type, with the exception of WHSmith where over a quarter of shoppers said the wait / queue was not acceptable.

CHART 5 QUEUE / WAITING TIME ACCEPTABLE



Overall, 121 shoppers said the wait was not acceptable. This included 7 shoppers who waited over twenty minutes (5 of whom assessed a WHSmith) with the reasons provided below:

WHSmith	56.00 minute wait	There was only one dedicated post office counter open despite other members of staff being present. The queue was very long and went outside the entrance to the post office area.
Main	25.30 minute wait	There were just two members of staff and one of them was busy packing the post that had been received. The wait times were unacceptable.
WHSmith	25.00 minute wait	Another counter should have been opened as it took too long to be served.
WHSmith	24.30 minute wait	The queue was too long, it was so long that it went near the stairs and it took too long to be served.
Main	21.00 minute wait	I feel that the waiting time was too long and maybe the position could have been opened at the main Martin's counter.
WHSmith	20.00 minute wait	I waited for a really long time and, if the branch was busy, the members of staff should have opened more counters.
WHSmith	20:00 minute wait	It was too long - maybe there should be more staff for self-service counters.

Finally, 2% of shoppers were directed to another counter or serving position when they made their enquiry.

4.6 Customer service

4.6.1 Counter service

Shoppers were asked whether staff dealt with the enquiry with due discretion / concern for the shopper's privacy. Overall, 52% of shoppers said that privacy was required and, of those (n=936) 3% said that they didn't feel the staff member dealt with their enquiry with due discretion. Of the 26 shoppers who did have a concern, 14 were in PO Locals; and the reasons given overall are shown below:

PO Local	The transaction was fairly open to the public. The queue behind me was rather close and there were no privacy screens.
PO Local	The counter was open and there were other customers on each side of me who were filling up their forms. They could see all the transactions including when I paid for the postage using my debit card and when I entered the pin number so there was no privacy at all.
PO Local	Although the member of staff was behind the counter, our whole conversation could be heard by people queuing behind me, and also other normal shoppers.
PO Local	Although there were plastic/Perspex screens, other customers could easily hear the discussions and conversations.
PO Local	Whilst I was asking about Local Collect the member of staff started to serve another customer at the retail counter. By the time I left two other people had joined the conversation.
PO Local	All other customers in the queue were able to hear me.
PO Local	No, everyone could hear the conversation.

4.6.2 Privacy

Overall, 25% of shoppers noticed Perspex screens at the counter and 20% noticed other privacy devices. In total, 8% of branches had both Perspex screens and other privacy devices. As such, 17% of shoppers saw Perspex screens only and 12% saw privacy screens only.

In total, 63% of branches had neither, increasing to 70% in sub-post offices. Newly franchised Crowns were most likely to have these facilities in place.

TABLE 30 PRIVACY BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Perspex screens only	17%	19%	16%	20%	19%	15%	17%	17%
Other privacy devices only	12%	8%	8%	15%	12%	20%	18%	12%
Both Perspex screens and other privacy devices	8%	3%	6%	9%	9%	13%	18%	6%
Neither Perspex screens nor other privacy devices	63%	70%	69%	56%	61%	54%	46%	65%

*Where columns add up to more or less than 100% this is down to rounding

4.6.3 Staff competency

89% of shoppers felt that staff asked them sufficient questions (in order to establish needs and recommend the

most appropriate products) and 91% thought the staff had sufficient knowledge.

Overall, 97% of shoppers said that staff gave them their full attention and 96% stated that staff were courteous and professional throughout:

TABLE 31 STAFF COMPETENCY

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Staff gave their full attention	97%	95%	95%	98%	98%	99%	99%	97%
Staff asked sufficient questions	89%	86%	88%	91%	93%	88%	89%	87%
Staff were courteous and professional	96%	94%	96%	98%	99%	96%	99%	95%
Staff had sufficient knowledge	91%	93%	88%	94%	95%	88%	91%	89%

In general the vast majority of staff across all branch types gave the customer their full attention and were courteous / professional. However, there were some differences noted in terms of knowledge and sufficient questioning, with staff in Locals, WHSmith and privately managed branches below the average.

Overall, 5% of staff had to pass the customers on to another member of staff, with examples of the reasons given shown below:

PO Main	The member of staff confirmed about the passport check and send service with their colleague who was sitting behind the closed position doing work related tasks
PO Main	They asked to clarify if it was OK to send bottles of perfume, as well as checking the dangerous goods list, and also to clarify which sticker needed to be placed on the box, and where it should be placed.
PO Main	They asked the person at the next counter if they could take parcels from Amazon at the post office.
PO Local	Initially when I approached the counter a general member of staff said they would get the post office member of staff to assist me as they were trained in the post office.
PO Local	The member of staff asked a colleague when she was unsure whether to offer me first or second class and when I asked about the parcel weight limit.
PO Local	Two members of staff were present and they both had input when questioned about using the banking services.
PO Local	The member of staff sought clarification from a colleague on my business account question.
Sub-post office	The member of staff was unsure about one of my questions relating to parcel limit weights and sought assistance from the manager.
Sub-post office	When I asked for the Passport form, the member of staff advised me to go to a major post office branch.

Finally, 62% of shoppers stated that the member of staff asked whether there was anything else they could help with (increasing to 77% in Crown branches and falling to 53% in sub-post offices); and the member of staff tried to sell something additional in 3% of cases. Attempted cross-sales were highest in Crown branches at 10%, followed by 3% in privately managed branches. Across all other branches types, cross-sales were recorded in 2% of visits.

In those visits where cross-sales were attempted (n=48), the most common item was Internet / Broadband

contract (19%), followed by Banking or Financial Services products (17%) and Travel Money (6%).

4.6.4 Shopper satisfaction levels.

Overall, in 63% of visits shoppers were extremely or very satisfied with their experience, while 6% of shoppers were dissatisfied.

TABLE 32 SATISFACTION BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1789	305	579	302	150	152	141	150
Extremely satisfied	26%	21%	22%	32%	31%	25%	32%	29%
Very satisfied	37%	44%	33%	39%	39%	29%	35%	37%
Fairly satisfied	23%	21%	28%	19%	20%	29%	24%	17%
Neither satisfied / dissatisfied	7%	7%	9%	5%	7%	8%	2%	11%
Fairly dissatisfied	4%	6%	5%	3%	2%	6%	3%	3%
Very dissatisfied	1%	1%	1%	2%	1%	1%	3%	1%
Extremely dissatisfied	1%	1%	2%	1%	1%	2%	1%	1%

Newly franchised (91%) Mains and Crown branches (90% each) received the best feedback in terms of the proportion of shoppers saying they were extremely, very or fairly satisfied.

Locals, WHSmith and privately managed branches received the lowest overall feedback, with only 83% of shoppers across each branch type saying they were either extremely or very satisfied.

Amongst extremely satisfied shoppers, there are numerous references to staff being friendly, helpful and warm, as well as professional and efficient. In addition, many shoppers referenced staff knowledge, the lack of queues and a good atmosphere.

Examples of feedback from shoppers saying they were 'extremely satisfied':

PO Main	I spoke to a very pleasant member of staff who genuinely wanted to help me.
PO Main	The member of staff was helpful and knowledgeable, giving me their full attention at all times.
PO Main	I received great service with all of my needs met in a courteous and friendly manner.
PO Main	The service was friendly and helpful and I was very satisfied with my visit.
PO Local	The friendly member of staff engaged me in conversation and volunteered advice about services available in the branch.
PO Local	There was ample parking near the branch. The store exterior and interior were all clean and tidy. I was served promptly and the member of staff was cheerful and professional.
PO Local	The member of staff was thoroughly helpful.
PO Local	I was able to complete all my business and I was given all the information that I needed about sending parcels.
Sub-post office	The member of staff was very helpful and friendly, they came across as being confident in their knowledge.
Sub-post office	I received great, friendly service.

Examples of feedback from shoppers saying they were 'extremely dissatisfied':

PO Main	The waiting time was unacceptable. Having 1 counter open when 5 were available did not provide good customer service.
PO Main	I was made to feel like an interruption to a personal conversation the member of staff was conducting. No smile, a sullen look and eye contact and dismissive behaviour was genuinely shocking and would deter me from entering this branch again.
PO Main	I was disappointed that despite twice explaining that the parcel was not urgent that I was only offered the expensive Next Day Delivery options. I also understand that I should have been told I could redirect parcels and that there would be a charge for collecting Amazon items.
PO Main	It is completely unacceptable to have to queue for over 15 minutes.
PO Local	The member of staff had poor knowledge of postal services.
PO Local	There was a total disregard for privacy and security by asking how often I would be paying in money, in public. Also the member of staff who was in the retail queue and was not recognisable to me as a post office worker did not identify herself to me, before I asked who they were. It was very unprofessional and everybody in the queues, that had formed by this time, were listening to this conversation. They were insistent I should come back next week and even when I had finished that part of the assessment and when I was checking around the area discreetly to finish my assessment they came up to me again and repeated that I should come in again next week and they would call their area manager about the enquiry. This conversation was carried out in the retail area of the branch.
PO Local	The member of staff was polite but did not make any effort in finding out my needs and to what my parcel contained. No explanation was given to the postal fee charged. Wheelchair users would not be able to gain access as the facilities were not appropriate.
PO Local	The member of staff was polite and friendly and listened to my needs before choosing the best option for me, whilst also describing why this option was chosen.
Sub-post office	The branch was dirty and had a run down look. The access was awkward and not clearly marked with a tone in notices which was unfriendly. The member of staff was unhappy and complained about the situation they were faced with and whilst queuing I was faced with pornographic magazines. I was repeatedly offered more expensive and unnecessary services.
Sub-post office	I did not feel that this visit was successful at all and the member of staff was completely distracted.

4.7 Internal and external summary

- Overall 2% of shoppers could not complete their visit due to the branch or post office counters / service positions being 'unexpectedly' closed.
- Overall, 70% of shoppers said there was parking 'nearby' (i.e. within 100 yards or so) increasing to 81% at PO Local and PO Main branches, but falling to 38% for WHSmith branches.
- The vast majority of branches had a visible post office sign or logo (98%), however a smaller proportion of branches displayed opening hours prominently (78%) and 69% of branches made references to Post Office services. This was particularly low in sub-post office branches at 46%. Where opening hours were displayed (n=1,403), the hours those displayed on the Post Office website in 95% of cases.
- In terms of access, 38% of branches had electronic doors (increasing to 80% in newly franchised Crowns) and 76% of branches had at least one entrance wide enough for wheelchair access and flat (increasing to

96% in newly franchised Crowns).

- The majority of post office counters were located on the ground floor (90%), but 8% of branches had counters on the first floor or higher (including 37% of WHSmith branches) and 2% had counters in the basement (including 7% of WHSmith branches). In branches where the post office counters were on a different floor, 75% had an internal lift.
- 77% of shoppers at PO Locals noted internal signage relating to the post office, although this was lower in sub-post offices (70%) and PO Locals (71%).
- In terms of accessibility, 92% of shoppers who assessed a branch with aisles felt that they were wide enough for wheelchairs (increasing to 99% of Crown branches and 97% of WHSmith and newly franchised branches), and obstacles were noticed in 5% of visits (increasing to 13% in sub-post offices).
- Over six in ten branches had portable PIN pads, but other facilities for disabled customers were only available in less than half of branches.
- The average number of counters recorded was 3.0 on each visit, increasing to 4.5 in Crown branches; and 91% of branches had a dedicated post office counter (falling to 84% in PO Locals).
- Trade was described as either fairly or very quiet in 68% of assessments, compared to only 35% of assessments in WHSmith branches and 38% in Crowns. Indeed, 15% of Crown and 14% of WHSmith branches were classed as extremely busy. Lunchtime was the busiest time of the day.
- Overall 49% of shoppers had to wait or queue (increasing to 80% in WHSmith and 77% in Crown branches) with an average waiting time of 3.21 minutes (increasing to 4.44 minutes in WHSmith branches). Transactions times were largely consistent across branch types and times of the day.
- Overall 14% of shoppers said their wait was not acceptable, with one shopper waiting almost one hour in total at a WHSmith.
- In over half of assessments (52%), shoppers said that privacy or discretion was not required; and in the remaining visits 97% of enquiries were dealt with discreetly.

To summarise, whilst the larger high street branches were more likely to have better external access for disabled customers (e.g. electronic doors, entrances that were wide enough for wheelchairs) and better internal access (e.g. wider aisles and no obstacles); in addition to more counters and a higher prevalence of disabled facilities such as portal PIN pads; they were more likely to be busier than PO Local and sub-post offices branches and, in general, shoppers had to be wait longer to be served.

Therefore, whilst more could be done in PO Locals and sub-post offices to improve facilities for disabled people; more could be done in the bigger high street branches to improve waiting times.

5 Scenario Specific Findings – Quality of Advice

This section refers to how the different scenario enquiries were handled by staff.

An overview of each scenario is provided in Section 3.3, with the assessment numbers achieved on each scenario repeated below.

TABLE 33 NUMBER OF ASSESSMENTS PER SCENARIO – POSTAL

Total	Second class large letter	Special Delivery	Royal Mail Signed-For second class	Royal Mail Signed-For small parcel	International parcel
1997	481	477	278	480	281

TABLE 34 NUMBER OF ASSESSMENTS PER SCENARIO – NON POSTAL

Total	Cash Withdrawal	Cash Deposit	Business Deposit	Passport Check	Local Collect	Parcel weight limit
2581	480	682	185	586	463	185

5.1 Second class large letter

Shoppers were instructed to approach the counter and say that they wanted to send a large letter which did not need to arrive until the end of the following week. The letter - which did not weigh more than 100g and was larger than a standard sized letter (exceeding 24cm in length, 16.5cm in width and up to 0.5cm in thickness), but no larger than a large letter (not exceeding 35.3cm in length, 25cm in width and 2.5cm thick) – was prepared and addressed in advance by shoppers. They listened to what they were offered initially and, if asked, they said that they did not need a signature and the contents of the letter are not valuable.

If shoppers were not initially offered the correct postage as the only option they reiterated their needs, asked for a recommendation and recorded what option(s) were provided by the member of staff. If shoppers were still not offered the correct postage they were told not to post the letter.

The scenario was designed to test whether counter staff asked relevant questions and identified the correct postal solution (second class large letter).

481 shoppers undertook the second class large letter scenario, across all branch types.

TABLE 35 NUMBER OF SCENARIO 1 ASSESSMENTS PER BRANCH TYPE

Total	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
481	59	146	77	50	53	50	46

5.1.1 Queries relating to the letter.

In order to establish the most suitable option for the customer, staff members are expected to establish exact requirements including factors such as the letter contents, value and whether the item needs to be signed for. The following table shows the data split by branch type in terms of what questions staff members asked

TABLE 36 STAFF QUERIES ABOUT THE LETTER

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All second class large letter visits	481	59	146	77	50	53	46	50
Ask about the letter contents	38%	22%	32%	38%	44%	42%	50%	52%
Asked if letter contained dangerous, prohibited or restricted items	14%	8%	10%	17%	14%	15%	24%	10%
Asked about the value of the contents	22%	7%	18%	26%	32%	25%	26%	24%
Asked if you wanted letter to be signed for on delivery	37%	24%	29%	43%	60%	34%	54%	33%

14% of shoppers reported being asked about whether the parcel contained anything dangerous or prohibited (n=69), of whom only 4 said they were shown a table / leaflet or chart.

Staff in sub-post office and PO Local branches were least likely to ask specific questions about the contents; although across the board the level of questioning was low, with shoppers in only 38% of assessments being asking about the letter contents.

5.1.2 Staff solution – i.e. what the customer was offered.

The correct response to this enquiry was to recommend a 74p second class large letter stamp **only**.

Initially, after listening and responding to any staff questions, only 40% of shoppers were offered the second class large letter option as the **only** option. An additional 50% of shoppers were recommended the second class large letter option alongside other options and 10% were not offered the correct postage at all, in which a range of other options were offered, as the following table shows:

TABLE 37 OPTIONS INITIALLY OFFERED

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All second class large letter visits*	481	59	146	77	50	53	46	50
Second class large letter stamp – 75p – ONLY	40%	46%	41%	44%	24%	42%	40%	37%
Second class large letter stamp – 75p – plus other options	50%	44%	49%	47%	62%	49%	48%	59%
First class stamp – 64p	4%	2%	3%	8%	0%	4%	4%	4%
Second class stamp – 55p	4%	2%	5%	4%	4%	6%	6%	4%
First class large letter stamp – 96p	53%	46%	55%	47%	64%	47%	50%	61%
First class stamp, Royal Mail Signed For - £1.74	3%	0%	5%	7%	0%	0%	7%	0%
Second class stamp, Royal Mail Signed For - £1.65	1%	0%	2%	5%	0%	0%	0%	0%
First class large letter stamp, Royal Mail signed for - £2.06	4%	6%	7%	2%	5%	0%	0%	7%
Second class large letter stamp, Royal Mail signed for - £1.85	5%	9%	5%	9%	5%	0%	0%	3%
Special Delivery - £6.45	3%	3%	3%	7%	3%	0%	0%	0%

*All figures based on the total base sizes (e.g. 481 total and the equivalent overall base size for each branch type)

As outlined above, in the majority of assessments the shopper was offered the second class large letter stamp, although a significant number were also offered the first class large letter stamp at 96p.

There was little difference across branches in terms of the overall proportion offered a second class large letter sample (although this was highest in privately managed branches at 96%).

Those shoppers given more than one option, in addition to those who weren't offered the second class large letter stamp initially at all (n=289) were then instructed to **re-state** their needs. This resulted in the following recommendations:

TABLE 38 OPTIONS OFFERED AFTER RE-STATING NEEDS

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All second class large letter visits following re-stated needs*	289	32	86	43	38	31	30	29
Second class large letter stamp – 75p – ONLY	55%	66%	57%	58%	45%	48%	53%	59%
Second class large letter stamp – 75p – plus other options	33%	22%	30%	28%	42%	42%	37%	38%
First class stamp – 64p	>0%	0%	0%	2%	0%	0%	0%	0%
Second class stamp – 55p	6%	6%	2%	9%	8%	6%	10%	0%
First class large letter stamp – 96p	13%	6%	13%	16%	13%	10%	17%	17%
First class stamp, Royal Mail Signed For - £1.74	0%	0%	0%	0%	0%	0%	0%	0%
Second class stamp, Royal Mail Signed For - £1.65	1%	0%	3%	2%	0%	0%	0%	0%
First class large letter stamp, Royal Mail signed for - £2.06	1%	0%	1%	0%	3%	0%	0%	0%
Second class large letter stamp, Royal Mail signed for - £1.85	3%	9%	3%	5%	1%	0%	0%	3%
Special Delivery - £6.45	>0%	0%	0%	2%	0%	0%	0%	0%

*Figures based on all shoppers, excluding those given only the correct option initially.

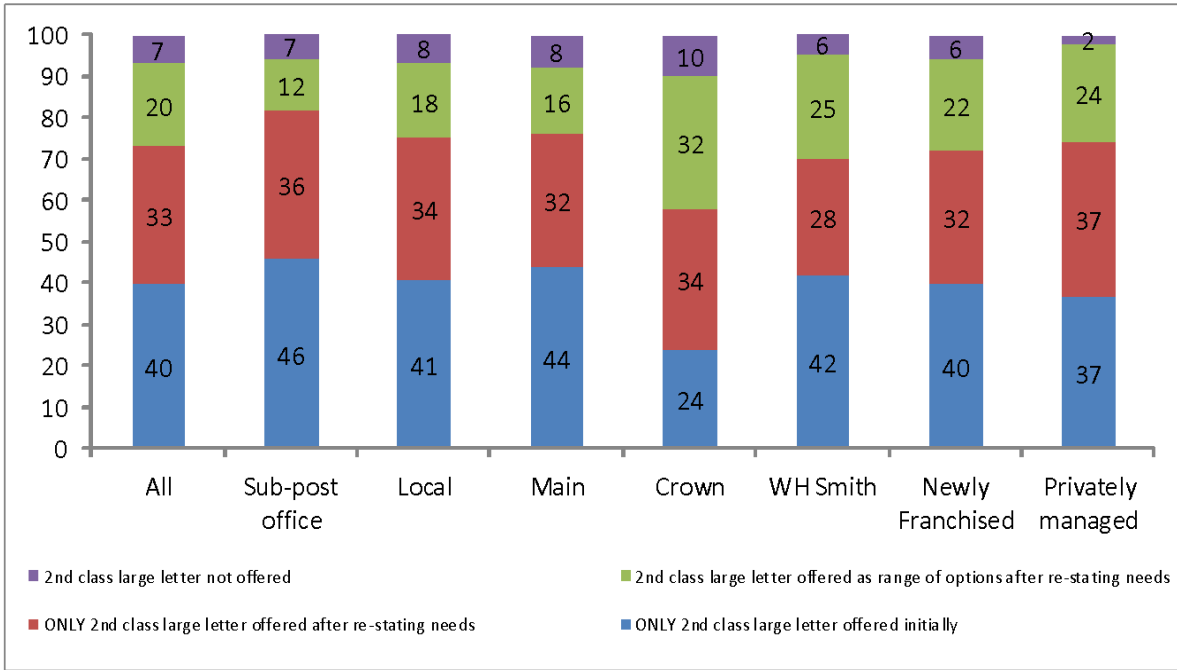
Overall, a further 88% of shoppers (after re-stating their needs) were offered the correct option, including 33% who were only offered that option; however shoppers were still offered alternatives including 13% offered the First Class Large Letter stamp at 96p.

5.1.3 Overview

Overall, of the 481 shoppers who undertook this scenario:

- 192 (40%) were offered the second class large letter stamp, as the only option following their initial enquiry
- 160 (33%) were offered the second class large letter stamp as the only option once they re-stated their needs (having been offered the correct service alongside others or just the incorrect options initially)
- 96 (20%) were offered the second class large letter stamp as part of a range of options (once they re-stated their needs)
- 33 (7%) were not offered the second class large letter stamp, despite re-stating their needs

CHART 6 SUMMARY OF OPTIONS



At least one shopper across every branch type was not offered the correct option, but the proportion was highest in Crowns, with 10% of shoppers (5 out of 50) not being offered.

5.1.4 Arrival details

Of all those shoppers who were offered the second class large letter stamp as the **only** option, 85% were told the letter would arrive within three working days, including Saturday, 1% were told the next day and 15% were told something else.

5.1.5 Summary

- Overall, the level of questioning by staff in relation to this scenario was low, with shoppers in less than 4 in 10 assessments (38%) being asked about the contents of the letter, falling to 22% in sub-post offices.
- In addition, only 22% were asked about the value of the letter, falling to 7% in sub-post offices.
- Initially, 90% of shoppers were offered the correct option (the 75p stamp), although only 40% overall were offered this as the only option.
- A higher number of shoppers were offered the correct option only when they re-stated their needs, however 7% overall were not offered the correct option at all and 20% overall were offered the 75p stamp as a range of options.
- 85% of shoppers who were offered the correct option were told it would arrive within three working days.

In summary, whilst the majority of shoppers were offered the correct 96p stamp option (either as the only option or a range of options) there were some differences by branch type (with shoppers at privately managed branches being more likely to have the correct recommendation than in Crowns) and the level of questioning was low overall, particularly in sub-post offices and PO Local branches.

5.2 Special Delivery

5.2.1 Scenario overview

Shoppers were instructed to say they wanted to send a card/letter which *contained vouchers*, and wanted to know how to send it.

Shoppers were instructed to prepare a standard sized letter, weighing no more than 100g.

If asked, shoppers were instructed to say that it was essential for the letter to get to its destination by the next day and that the letter contained vouchers worth over £50.

Shoppers were instructed to assess what information was given about delivery times and dates and, if visiting on a Friday, they assessed whether the Saturday guarantee surcharge was mentioned.

The scenario was designed to test whether counter staff asked relevant questions and identified the correct postal solution (i.e. Special Delivery). Special Delivery was the correct service due to the contents and value of the item and the requirement for the item to arrive at its destination the next day. However, staff were required to ask the appropriate questions to determine the shopper needs before offering Special Delivery.

In total 477 shoppers completed the Special Delivery scenario, as outlined below:

TABLE 39 NUMBER OF SPECIAL DELIVERY ASSESSMENTS PER BRANCH TYPE

Total	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
477	57	145	71	49	53	50	52

5.2.2 Staff recommendation and queries.

Following the initial enquiry about how to send the letter (i.e. before the shopper was asked any questions) 18% were spontaneously advised to use a specific service. Based on the open-ended verbatim responses of those who were offered a specific service 12% were offered Special Delivery spontaneously, 2% were offered First Class and 4% were offered another service (covering a range of responses).

Shoppers then assessed what questions they were asked by staff:

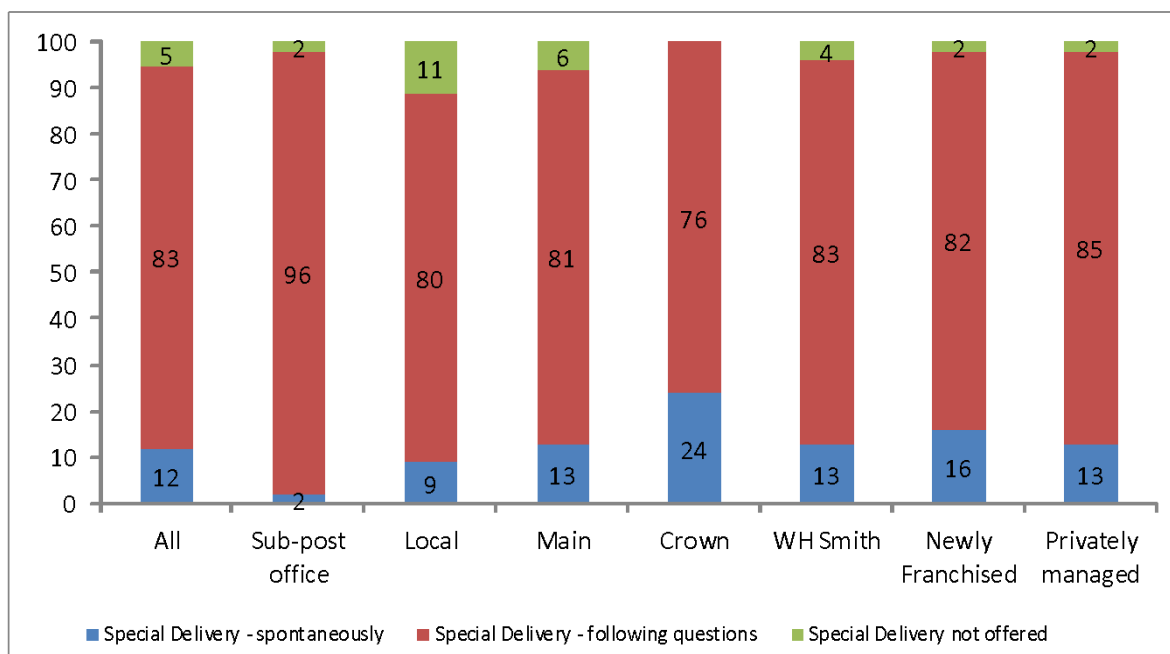
TABLE 40 STAFF QUERIES ABOUT THE LETTER

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Special Delivery visits	477	49	145	71	50	52	57	53
Did the member staff ask you when it needed to be delivered by?	70%	72%	70%	76%	61%	72%	68%	67%
Asked about the contents of the letter	72%	67%	69%	77%	67%	70%	80%	75%
Asked about the value of the contents	74%	74%	71%	83%	69%	70%	86%	71%
Asked whether you needed security enhancements	55%	53%	60%	63%	39%	49%	64%	44%

There was no consistency across branch types in the level of questioning; however staff in Crown branches were less likely than average (across all elements) to ask the shopper key questions; whereas staff in Main branches were above average on all measures.

Overall, 93% of shoppers were asked at least one question; and, in total, the staff member recommended Special Delivery in 95% of assessments, with some differences across branches:

CHART 7 OFFERED SPECIAL DELIVERY



5.2.3 Information relating to Special Delivery

Of those who were offered Special Delivery (n=452), the following information was provided.

TABLE 41 SPECIAL DELIVERY CONFIRMATION

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All offered Special Delivery	452	56	129	67	49	51	49	51
Would guarantee next day delivery	84%	86%	81%	88%	84%	75%	92%	90%
Offered the option of 9am or 1pm	33%	25%	37%	28%	37%	35%	29%	39%
Staff member confirmed when it would be delivered	83%	84%	79%	87%	86%	76%	90%	80%

Overall, the majority of shoppers were told that Special Delivery would guarantee next day delivery, although this was higher in Crown and newly franchised branches. A much lower proportion of shoppers (33%) were offered the option of 9am or 1pm, falling to only 25% in sub-post office branches.

Shoppers were also instructed to comment on how much the service would cost. Of all those recommended Special Delivery (n=452), 92% were told the cost was £6.45 with a further 1% also told about the additional Saturday fee of £10.74. 30 shoppers who were recommended Special Delivery were told another price ranging from £1.65 to £23.56. Seven were given a value of below £6.45 and 23 were given a value above £6.45. One shopper was simply told it was £3 more expensive on a Saturday and one shopper did not proceed, as they were told a return address was compulsory (which the shopper did not wish to provide).

7% of shoppers (n=33) who were offered another service, were provided with a range of options including First

Class Signed For and First Class.

Of the 95% of shoppers (n=452) who were offered Special Delivery, 105 undertook the assessment after the final collection time on Thursday or before the final collection time on Friday. Only 41 (39%) were told about the surcharge, whilst the remainder were not. There were some differences across branch types, with more than half the staff in newly franchised, privately managed and sub-post offices highlighting the surcharge.

5.2.4 Summary

- Overall 12% of shoppers were offered Special Delivery spontaneously prior to any staff questioning, rising to 24% of shoppers visiting Crowns.
- There were differences in the level of questioning with staff in Main branches more likely to ask key questions than those in Crown branches.
- Overall, 93% of shoppers were asked at least one 'key' question and 95% of shoppers, overall, were recommended Special Delivery.
- For those who were offered Special Delivery, the majority were told that it would guarantee next day delivery (84%), although the figure was higher in Crown and newly franchised branches; and most shoppers were told when it would be delivered. However, only one third of shoppers were told about the 9am and 1pm options, falling to only 25% in sub-post offices.
- Although the majority of shoppers were given the correct price for Special Delivery, this was not the case across the board with some very different prices provided.

In summary, the majority of shoppers were offered Special Delivery and every shopper assessing a Crown branch was recommended the service; however over one in ten (11%) were not offered the service in PO Local branches.

Overall, staff in PO Main and newly franchised branches were most likely to ask relevant questions.

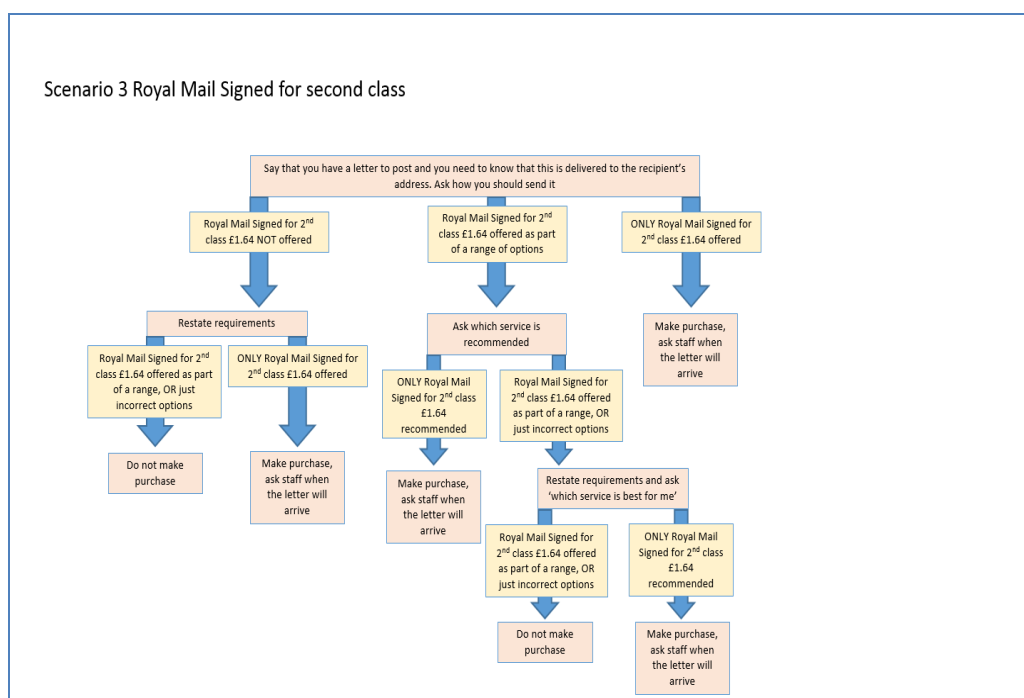
5.3 Royal Mail Signed For second class letter

This scenario involved shoppers saying that they wanted to send a letter and needed to know that it was delivered to the recipient's address. Shoppers were instructed to prepare a standard size envelope (up to but not exceeding 24cm in length, 16.5cm in width and 0.5cm in thickness, containing a sheet of paper; and not weighing more than 100g). Only if asked, shoppers mentioned that the letter did not need to reach its destination until the end of the following week, that it contained nothing valuable and that they did not require tracking but would like a signature on delivery for peace of mind.

Shoppers were instructed to assess a range of elements (including recommendations and prices) and post the letter in accordance with the recommended solution. The 'correct' solution for this scenario was the 'Second class, Royal Mail Signed For' at £1.65 only.

There were 3 potential purchase paths to take depending on what was recommended to shoppers, as set out below and in the flow chart:

- If shoppers were only offered the correct option initially they were instructed to make the purchase
- If shoppers were initially offered the correct service alongside other options they were instructed to ask for a recommendation, recording and responding to any further questions. If they were still not offered the correct service only, they then re-stated their needs
- If shoppers were not initially offered the correct service at all they then re-stated their needs.



In total 278 shoppers at PO Locals (144) and sub-post office branches (134) only. This scenario was not conducted across the other branch types.

5.3.1 Initial advice and questioning

Following the initial enquiry about how to send the letter (i.e. before the shopper was asked any questions) 22% were spontaneously advised to use a specific service. Of those who were, based on the verbatim open-ended responses, 4% were offered First Class, 3% First Class Signed For, 3% Special Delivery and 12% a range of other options. There was very little difference across the branch types.

Shoppers then assessed what questions they were asked by staff, with small differences across the two

branch types:

TABLE 42 STAFF QUERIES ABOUT THE LETTER

	All	Sub-post office	Local
All Royal Mail Signed For second class letter visits	278	134	144
Asked if you wanted a signature	76%	77%	75%
Asked about the time sensitivity of the letter	58%	56%	60%
Asked about and discussed the contents of the letter	35%	37%	33%
Asked if the contents contained anything dangerous or prohibited	8%	8%	9%
Asked about the value of the letter	29%	31%	27%
Asked if you needed to track the item	20%	16%	23%

Overall, shoppers were most likely to be asked if a signature was required; however just over a quarter (76%) were not asked this question. As low as 8% of shoppers were asked if the content contained anything dangerous or prohibited and, of those shoppers (n=24) only 4 were also shown a table, leaflet or chart. Less than six in ten were asked about time sensitivity and even fewer were asked about the contents of the letter (35%), the value (29%) or the need for tracking (20%).

Only one shopper was asked all six questions outlined above.

5.3.2 Staff solution – i.e. what the customer was offered initially

The correct response to this enquiry was to recommend a £1.65 second class stamp, Royal Mail Signed For **only**.

In total 79% of shoppers were recommended the correct option initially. However, only 36% were offered the second class stamp, Royal Mail Signed For as the **only** option. 21% were not offered it at all.

In addition, a range of other options were offered initially including, most commonly, the £1.74 First Class Royal Mail Signed For stamp, as the following table shows:

TABLE 43 OPTIONS INITIALLY OFFERED

	All	Sub-post office	Local
All Royal Mail Signed For Letter visits*	278	134	144
Second class stamp, Royal Mail Signed For - £1.65 -ONLY	36%	38%	34%
Second class stamp, Royal Mail Signed For - £1.65 - plus other options	43%	39%	47%
First class stamp – 64p	19%	16%	22%
Second class stamp – 55p	15%	13%	17%
First class large letter stamp – 96p	4%	3%	4%
Second class large letter stamp – 75p	4%	4%	3%
First class stamp, Royal Mail Signed For - £1.74	46%	49%	43%
First class large letter stamp, Royal Mail signed for - £2.06	5%	4%	6%
Second class large letter stamp, Royal Mail signed for - £1.85	9%	6%	11%
Special Delivery - £6.45	14%	16%	12%

*All figures based on the total base sizes (e.g. 278 total and the equivalent overall base size for each branch type)

5.3.3 Staff questioning and solution – those offered multiple options initially

Overall 119 shoppers were initially offered the correct option alongside a range of options. These shoppers were instructed to ask for a recommendation, recording if staff explained the options and responding to any further questions from staff to determine their needs.

Firstly, shoppers (who were offered the correct option, as a range of options) were instructed to state whether all the options were either fully or partially explained, as outlined below. Almost half overall said that the options were fully explained, but a quarter said that none of the options were explained:

TABLE 44 OPTIONS EXPLAINED

	All	Sub-post office	Local
All offered Royal Mail Signed For Letter as part of a range of options	119	52	67
All options fully explained	47%	48%	46%
Options partially explained	29%	31%	25%
None of the options were explained	24%	21%	29%

Less than 60% of shoppers overall were asked further questions about time sensitivity, contents, value and whether the item needed to be tracked, with small differences across the two branch types:

TABLE 45 STAFF QUERIES ABOUT THE LETTER

	All	Sub-post office	Local
All offered Royal Mail Signed For second class letter as a range of options	119	52	67
Asked about time sensitivity	57%	50%	63%
Asked about the contents	24%	23%	25%
Asked about the value	19%	19%	19%
Asked about wanting to track the item	33%	33%	33%
Signature on delivery	73%	71%	75%

Those shoppers given more than one option were then instructed to ask for a **recommendation**. This resulted in the following recommendations:

TABLE 46 OPTIONS OFFERED AFTER ASKING FOR A RECOMMENDATION

	All	Sub-post office	Local
All Royal Mail Signed For Letter visits following re-stated needs	119	52	67
Second class stamp, Royal Mail Signed For - £1.65 -ONLY	36%	35%	37%
Second class stamp, Royal Mail Signed For - £1.65 - plus other options	54%	54%	54%
First class stamp – 64p	8%	12%	6%
Second class stamp – 55p	9%	8%	10%
First class large letter stamp – 96p	4%	6%	3%
Second class large letter stamp – 75p	4%	4%	4%
First class stamp, Royal Mail Signed For - £1.74	31%	37%	27%
First class large letter stamp, Royal Mail signed for - £2.06	2%	2%	1%
Second class large letter stamp, Royal Mail signed for - £1.85	8%	8%	9%
Special Delivery - £6.45	9%	12%	7%

*Figures based on all shoppers who re-stated their needs

As such, in addition to the 100 shoppers who were offered the correct option **only** following their initial enquiry, a further 43 shoppers were offered the correct option **only** having asked for a recommendation. This equated to 143 shoppers overall or **51%**.

5.3.4 Staff solution – all shoppers not recommended the correct product as the only option

The remaining 49% of shoppers (n=135) were then instructed to re-state their needs and recorded what they were offered by the member of staff. These 135 shoppers included:

- 59 shoppers who were **not** offered the correct option at all initially
- 64 shoppers who were offered the correct option, but as part of a range of options having asked for a recommendation
- 12 shoppers who were not offered the correct option having asked for a recommendation.

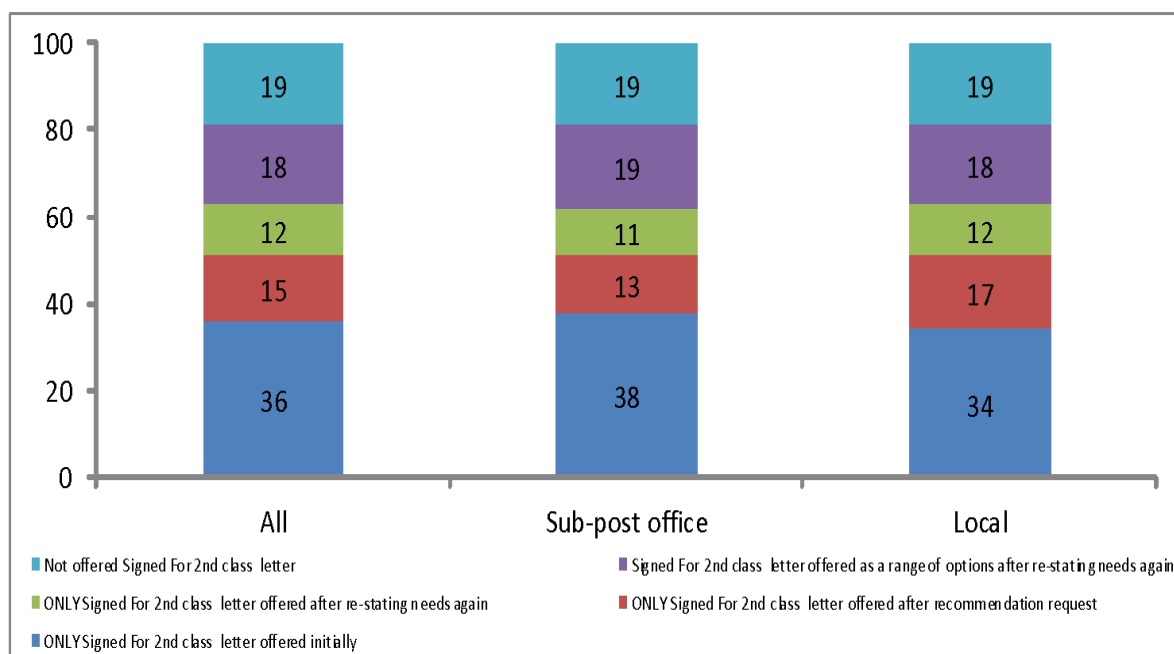
The remaining 135 shoppers were then offered the following:

TABLE 47 OPTIONS OFFERED AFTER RE-STATING NEEDS AGAIN

	All	Sub-post office	Local
All Royal Mail Signed For Letter visits following re-stated needs	135	65	70
Second class stamp, Royal Mail Signed For - £1.65 -ONLY	24%	23%	24%
Second class stamp, Royal Mail Signed For - £1.65 - plus other options	38%	38%	37%
First class stamp – 64p	7%	8%	7%
Second class stamp – 55p	8%	9%	8%
First class large letter stamp – 96p	2%	2%	3%
Second class large letter stamp – 75p	3%	3%	3%
First class stamp, Royal Mail Signed For - £1.74	26%	34%	19%
First class large letter stamp, Royal Mail signed for - £2.06	3%	5%	1%
Second class large letter stamp, Royal Mail signed for - £1.85	12%	11%	13%
Special Delivery - £6.45	5%	9%	1%

Despite re-stating their needs again, 52 shoppers (equating to 19% of all shoppers who conducted the scenario overall) were not given the correct option, either as the only option or a range of options resulting in the following overall figures:

CHART 8 SUMMARY OF OPTIONS



5.3.5 Arrival details

Shoppers who were offered the correct option only either initially, after asking for a recommendation or after re-stating their needs (n=175), 81% were told that it would take three working days for the letter to arrive, 1% were told it would arrive on the next working day and 18% were told something else. This included shoppers who were not told when it would arrive and shoppers where the number of *working* days was not specified.

5.3.6 Overview

Overall, of the 278 shoppers who undertook this scenario:

- 100 (36%) were offered the second class large letter stamp, as the only option following their initial enquiry.
- 43 shoppers (15%) were offered the correct option only following the request for recommendation.
- A further 32 shoppers (12%) were offered the correct option only and 51 shoppers (18%) were offered the correct option as a range of options having re-stated their needs again.
- As such, 52 shoppers (19% overall) were not offered the correct option at all, despite asking for a recommendation and re-stating their needs.
- This may be on account of the low proportion of shoppers being asked the necessary questions to establish their postage requirement.

In summary, 81% of shoppers were offered the correct option at some point, which was the same across both branch types. Across both branch types the level of questioning was low, although slightly higher in PO Local branches.

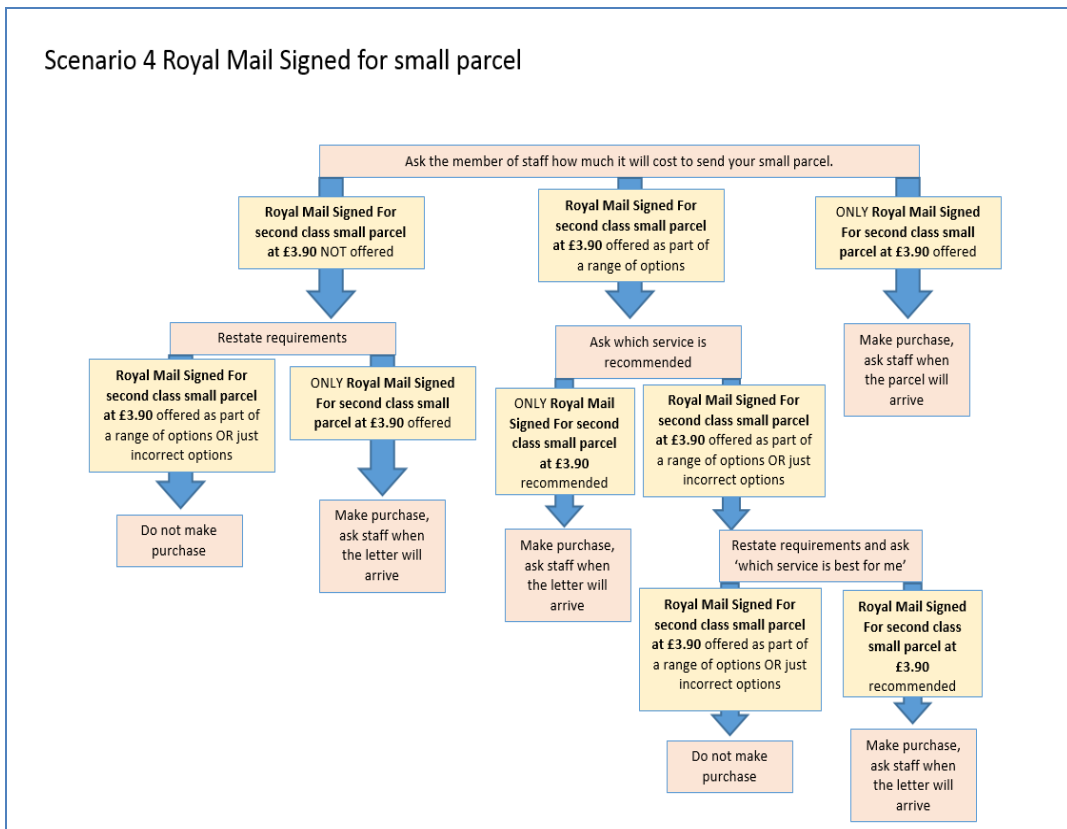
5.4 Royal Mail Signed For small parcel

This scenario involved shoppers saying that they wanted to send a small sized parcel in the knowledge that it *would be* delivered. Shoppers were instructed to prepare an item that was larger than a large letter (35.3cm in length, 25cm in width and thickness of more than 2.5cm), but no larger than the dimensions of a small parcel (45cm in length, 35cm in width and 16cm in depth). Shoppers asked how much it would cost to send their parcel. Only if asked, shoppers mentioned that it was not urgent for the parcel to reach its destination, it did not contain anything valuable or any dangerous, prohibited or restricted goods, weighs between 1-2kgs but they would like a signature on delivery for peace of mind.

Shoppers were instructed to assess a range of elements (including recommendations and prices) and post the letter in accordance with the recommended solution. The ‘correct’ solution for this scenario was the ‘Royal Mail Signed For second class small parcel’ at £3.95.

There were 3 potential purchase paths to take depending on what was recommended to shoppers, as set out below and in the flow chart:

- If shoppers were only offered the correct option initially they were instructed to make the purchase
- If shoppers were initially offered the correct service alongside other options they were instructed to ask for a recommendation, recording and responding to any further questions. If they were still not offered the correct service only, they then re-stated their needs
- If shoppers were not initially offered the correct service at all they then re-stated their needs.



In total 480 shoppers undertook this scenario, across all branches, as outlined below:

TABLE 48 NUMBER OF SECOND CLASS SIGNED FOR SMALL PARCEL ASSESSMENTS PER BRANCH TYPE

Total	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
480	55	144	77	52	55	50	47

5.4.1 Initial advice and questioning

Overall 477 shoppers (99%) were told they could post their parcel from the post office they visited – of the 3 who could not, 2 undertook their assessment in the Main branch and 1 in PO Local. One was told the outlet did not have enough space to store parcels (Main) and another shopper was told the following:

“After asking the contents of the parcel - I said trial packs of perfume and aftershave. The member of staff scanned the prohibited barcode and asked how many were in the parcel. I said five but not totalling more than 100ml. They said, “Sorry but you can only post between one and five items of perfume/aftershave.”

The remaining 477 shoppers assessed a number of factors relating to the discussion with the staff member:

TABLE 49 FACTORS RELATING TO THE SIZE OF THE PARCEL

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Royal Mail Signed For small parcel visits	477	55	143	75	52	55	50	47
Staff member asked about or discussed parcel weight	40%	44%	34%	48%	33%	49%	36%	45%
Staff member weighed the parcel	97%	100%	98%	99%	96%	96%	96%	94%
Staff member measured the parcel dimensions	30%	31%	29%	36%	31%	28%	26%	28%

The parcel was weighted in virtually all cases, although not in 6% of privately managed branch assessments. Staff were less likely to ask about the parcel weight or to measure the parcel dimensions, across the board.

TABLE 50 FACTORS RELATING TO THE CONTENTS OF THE PARCEL

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Royal Mail Signed For small parcel visits	477	55	143	75	52	55	50	47
Staff member discussed the contents of the parcel	84%	78%	78%	85%	90%	89%	94%	81%
Staff member asked if the contents included dangerous or prohibited items	50%	47%	50%	54%	52%	52%	50%	47%
Staff member asked about or discussed the value of the contents	62%	67%	54%	64%	77%	64%	62%	60%
Staff member asked about or discussed how the items should be packaged	31%	38%	26%	29%	35%	36%	40%	21%

In the majority of assessments (84%) staff discussed the contents of the parcel, but only half overall asked whether it included any dangerous or prohibited items. A higher number asked about the contents of the package, particularly in Crown branches, but only around a third of shoppers had a conversation about packaging.

TABLE 51 FACTORS RELATING TO SIGNATURE AND TIMING

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised	Privately managed
All Royal Mail Signed For small parcel visits	477	55	143	75	52	55	50	47
Staff member asked whether a signature was required	79%	76%	79%	87%	85%	73%	72%	79%
Staff member asked about time sensitivity	63%	62%	63%	69%	67%	62%	52%	62%
Staff member asked if the item needed to be tracked	26%	20%	20%	33%	37%	27%	28%	23%

Slightly under 8 in 10 shoppers were asked if a signature was required, and a lower number were asked about time sensitivity and whether the item needed to be tracked.

5.4.2 Staff solution – i.e. what the customer was offered.

The correct response to this enquiry was to recommend a £3.95 second class, Royal Mail Signed For 1-2K small parcel **only**.

In total 84% of shoppers were recommended the correct £3.95 option initially. However, only 50% were offered this as the **only** option.

In addition, a range of other options were offered spontaneously, as the following table shows.

TABLE 52 OPTIONS INITIALLY OFFERED

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Royal Mail Signed For small parcel visits*	477	55	143	75	52	55	50	47
Second class Royal Mail Signed For 1-2Kg Small Parcel - £3.95 – ONLY	50%	45%	50%	52%	52%	58%	46%	47%
Second class Royal Mail Signed For 1-2Kg small parcel - £3.95 – plus other options	34%	36%	38%	36%	35%	25%	34%	36%
Royal Mail First Class 1Kg Small Parcel - £3.35	17%	24%	17%	17%	10%	13%	16%	17%
Royal Mail First Class 2Kg small parcel - £5.50	10%	9%	12%	12%	12%	4%	4%	11%
Royal Mail second class 1-2Kg small parcel - £2.85	27%	31%	28%	36%	19%	24%	28%	21%
First Class Royal Mail Signed For 1-2Kg small parcel - £4.45	12%	11%	15%	15%	8%	7%	14%	13%
First Class Royal Mail Signed For 2Kg small parcel - £6.60	14%	13%	15%	15%	19%	15%	14%	6%
Royal Mail Special Delivery Guaranteed	9%	11%	8%	11%	8%	5%	10%	6%

*All figures based on the total base sizes (e.g. 477 total and the equivalent overall base size for each branch type)

Only 1 shopper was offered Parcelforce Worldwide and only 6 (4 in Locals) were offered a medium parcel price. Those shoppers who were initially offered the correct option (£3.95) as a range of options (n=164) were then instructed to ask for a recommendation. These shoppers also recorded if staff either fully or partially explained the option and whether they asked any further questions before making a recommendation.

Just over half overall said that the options were fully explained, but slightly over a quarter said that none of the options were explained:

TABLE 53 OPTIONS EXPLAINED

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Royal Mail Signed For small parcel visits where a range of options were given	164	20*	54	27*	18*	14*	15*	16*
All options fully explained	52%	60%	50%	74%	61%	29%	40%	31%
Options partially explained	20%	10%	22%	19%	28%	21%	27%	13%
None of the options were explained	28%	30%	28%	7%	11%	50%	33%	56%

*Low bases sizes across branch types

Questions about signature on delivery were most commonly asked, but in less than three quarters of assessments; with less than half of shoppers being asked about the value, whether the item needed to be tracked, whether the parcel contained dangerous or prohibited items and what the parcel weight / dimensions were.

TABLE 54 FURTHER STAFF QUESTIONING FOLLOWING RECOMMENDATION REQUEST

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Royal Mail Signed For small parcel visits – those offered a range of options	164	20*	54	27*	12*	14*	15*	16*
Time sensitivity	63%	60%	59%	70%	67%	50%	63%	60%
Contents	52%	55%	46%	74%	56%	36%	40%	56%
Value	49%	60%	35%	70%	56%	36%	40%	56%
Signature on delivery	72%	80%	67%	93%	67%	57%	60%	75%
Wanting to track the item	35%	30%	24%	48%	39%	43%	27%	50%
Parcel contains dangerous / prohibited items	38%	40%	33%	44%	39%	36%	27%	50%
Parcel weight / dimensions	29%	40%	22%	33%	17%	29%	27%	50%

*Low bases sizes across branch types

The 164 shoppers were then assessed what options were provided once they had asked for a recommendation:

5.4.3 Staff questioning and solution – those offered multiple options initially

TABLE 55 OPTIONS OFFERED FOLLOWING RECOMMENDATION REQUEST

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Royal Mail Signed For small parcel visits – those offered a range of options	164	20*	54	27*	12*	14*	15*	16*
Second class Royal Mail Signed For 1-2Kg small parcel - £3.95 – ONLY	31%	40%	31%	15%	39%	29%	33%	38%
Second class Royal Mail Signed For 1-2Kg small parcel - £3.95 – plus other options	64%	60%	63%	81%	50%	64%	60%	63%
Royal Mail First Class 1Kg small parcel - £3.35	23%	40%	15%	30%	17%	14%	33%	19%
Royal Mail First Class 2Kg small parcel - £5.50	17%	25%	13%	30%	22%	14%	0%	13%
Royal Mail Second class 1-2Kg small parcel - £2.85	27%	30%	28%	44%	11%	14%	33%	19%
First Class Royal Mail Signed For 1-2Kg small parcel - £4.45	24%	25%	26%	37%	6%	14%	27%	19%
First Class Royal Mail Signed For 2Kg small parcel - £6.60	24%	20%	30%	33%	22%	36%	7%	6%
Royal Mail Special Delivery Guaranteed	6%	10%	4%	11%	6%	0%	7%	6%

*Low bases sizes across branch types

Following the request for a recommendation, 95% of shoppers were offered the correct option, but only 31% were offered this as the only option.

As such, in addition to the 240 shoppers who were offered the correct option **only** following their initial enquiry, a further 51 shoppers were offered the correct option **only** having asked for a recommendation. This equated to 291 shoppers overall or **61%**.

5.4.4 Staff solution – all shoppers not recommended the correct product as the only option

The remaining 39% of shoppers (n=186) were then instructed to re-state their needs and record what options were provided by the member of staff. These 186 shoppers included:

- 73 shoppers who were **not** offered the correct option initially
- 105 shoppers who were offered the correct option as part of a range of options having already asked for a recommendation
- 8 shoppers who were not offered the correct option at all having already asked for a recommendation.

The final recommendation made to the 186 shoppers was as follows:

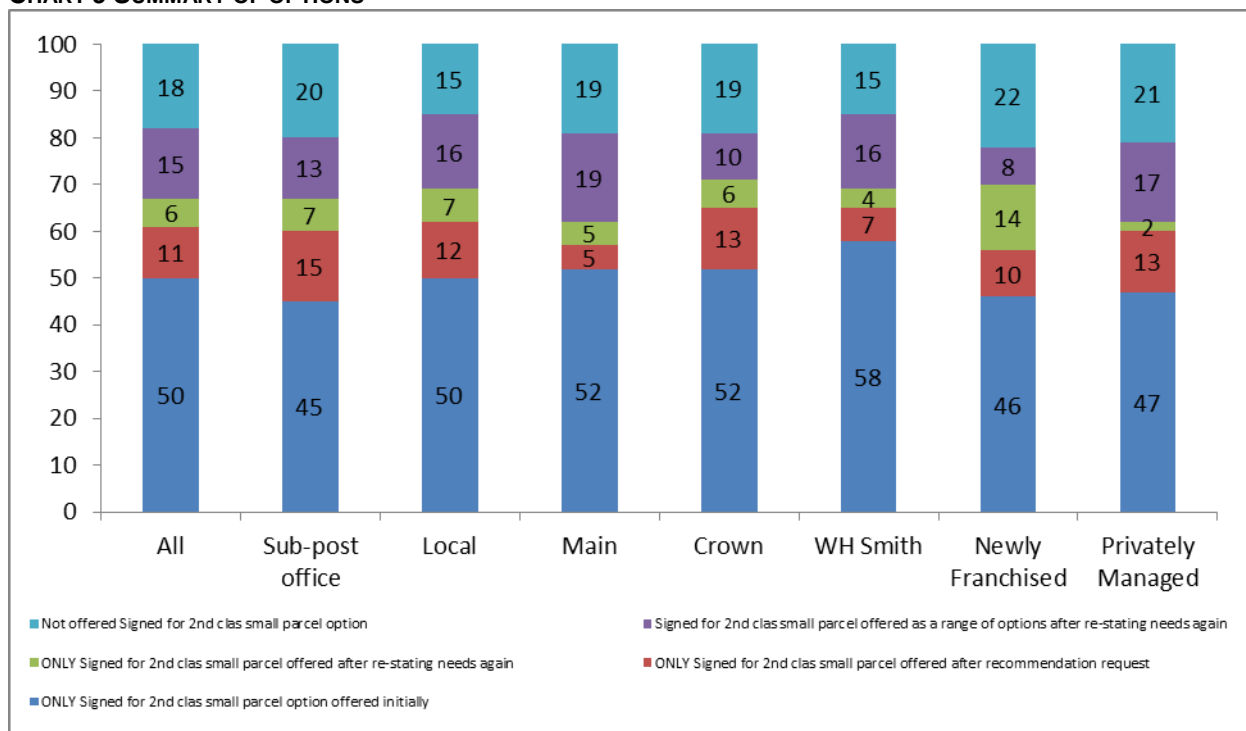
TABLE 56 OPTIONS OFFERED FOLLOWING FINAL RECOMMENDATION REQUEST

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Royal Mail Signed For small parcel visits – those requesting final recommendation	186	22*	54	32	18*	19*	22*	19*
Second class Royal Mail Signed For 1-2Kg small parcel - £3.95 – ONLY	17%	18%	19%	13%	17%	11%	32%	5%
Second class Royal Mail Signed For 1-2Kg small parcel - £3.95 – plus other options	38%	32%	43%	44%	28%	47%	18%	42%
Royal Mail First Class 1Kg small parcel - £3.35	9%	5%	6%	16%	6%	5%	5%	21%
Royal Mail First Class 2Kg small parcel - £5.50	5%	14%	6%	9%	0%	0%	0%	5%
Royal Mail second class 1-2Kg small parcel - £2.85	25%	41%	24%	22%	33%	16%	27%	16%
First Class Royal Mail Signed For 1-2Kg small parcel - £4.45	9%	14%	11%	0%	0%	21%	0%	16%
First Class Royal Mail Signed For 2Kg small parcel - £6.60	11%	18%	9%	19%	6%	11%	5%	5%
Royal Mail Special Delivery Guaranteed	3%	5%	2%	3%	0%	5%	5%	5%

*Low bases sizes across branch types

As shown in the table above, a further 55% were recommended the correct option, including 17% offered this as the only option.

CHART 9 SUMMARY OF OPTIONS



5.4.5 Arrival details

Of all those shoppers who were offered the £3.95 option as the **only** option, 81% were told the letter would arrive within three working days, including Saturday. 1% of shoppers were told the next day.

5.4.6 Overview

Overall, of the 477 shoppers who undertook this scenario:

- 322 shoppers (68%) were offered the correct £3.95 option as the ONLY option either initially, after asking for a recommendation or after re-stating their needs
- 70 shoppers (15%) were offered the correct £3.95 option as part of a range of options (once they re-stated their needs)
- And 85 shoppers (18%) were not offered the correct option at all, despite asking for a recommendation and re-stating their needs.
- This may be on account of the fact that less than two thirds (63%) were asked about time sensitivity and a quarter (26%) were asked if the item needed to be tracked.

In summary, 82% of shoppers overall were recommended the correct option at some point (either as the only option or a range of options), although this was higher in certain branches (e.g. PO Local and WHSmith branches) than others (e.g. newly franchised Crowns).

5.5 International parcel

Shoppers were instructed to prepare and send a small parcel, weighing between 250g and 500g, with one surface at least 9cm by 14cm, a combined length, depth and width of no more than 90 cm; and no side longer than 60cm. Shoppers were asked to address the parcel to someone in France, Germany, Republic of Ireland, Switzerland, Portugal, or Belgium. There was no requirement for next day delivery.

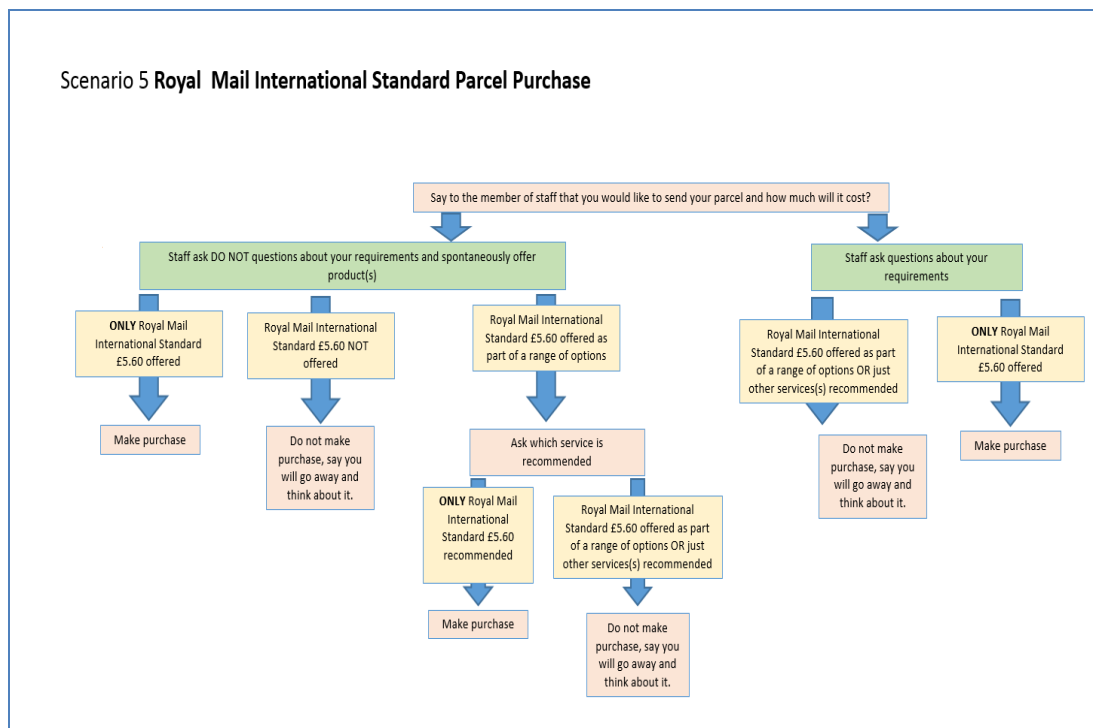
Shoppers were instructed to approach the counter stating that they would like to send the parcel and ask how much it would cost. Only if asked, shoppers mentioned that it was not urgent for the parcel to reach its destination, that the parcel weighed between 1-2kgs, did not contain anything valuable or any dangerous, prohibited or restricted goods, and did not require tracking, although they would like a signature on delivery for peace of mind. The 'correct' solution for this scenario was the 'Royal Mail international standard' at £5.60 but only after staff had asked appropriate questions to determine shoppers' needs.

As the most complex mail scenario, this scenario was only conducted at PO Mains and high street branches to test the product and pricing advice provided by branches with some of the most specialist and knowledgeable post office staff.

There were 5 potential purchase paths to take depending on what was recommended to shoppers, as set out below and in the flow chart:

- If shoppers were spontaneously offered the correct service only they went ahead and purchased the correct postage
- If shoppers were spontaneously offered the correct postage alongside other options they asked for a recommendation, purchasing the correct postage if they were offered this only
- If shoppers were spontaneously offered the incorrect postage they did not purchase any postage and informed the member of staff that they would go away and think about it
- If shoppers were asked questions and then offered the correct service only they went ahead and purchased this postage
- If shoppers were asked questions and then offered the correct postage alongside other options or the incorrect postage they did not purchase any postage and informed the member of staff that they would go away and think about it

Scenario 5 Royal Mail International Standard Parcel Purchase



In total 281 shoppers undertook this scenario, across all branches *excluding* PO Locals and sub-post offices, as outlined below:

TABLE 57 NUMBER OF INTERNATIONAL PARCEL ASSESSMENTS PER BRANCH TYPE

Total	Crown	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
281	49	77	49	54	50	51

Shoppers posted their parcel to a range of countries including France (42%), Germany (17%), the Republic of Ireland (16%), Belgium (11%), Switzerland (7%) and Portugal (7%).

5.5.1 Staff solution – i.e. what the customer was offered.

The correct response to this enquiry was to recommend the £5.60 second class, Royal Mail international standard **only** but only after staff had asked appropriate questions to determine shoppers' needs.

26% of shoppers said they were offered a service or services spontaneously without the staff member establishing their needs and, of those, 60% were offered the correct £5.60 service option overall including 38% who were only offered the £5.60 option:

TABLE 58 OPTIONS SPONTANEOUSLY OFFERED

	All	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All international parcel visits where a postage option spontaneously offered	73	18*	12*	14*	12*	17*
Royal Mail international Standard - £5.60 – ONLY	38%	33%	42%	36%	42%	41%
Royal Mail international Standard - £5.60 – plus other	22%	17%	42%	7%	17%	29%

options						
Royal Mail international Tracked and Signed For	49%	44%	75%	50%	42%	41%
Royal Mail international Economy - £5.40	22%	33%	42%	7%	8%	18%
Parcelforce Worldwide Global Express	12%	11%	33%	7%	0%	12%
Parcelforce Worldwide Global Priority	11%	11%	33%	7%	0%	6%
Parcelforce Worldwide Global Value	11%	11%	33%	7%	0%	6%

*Low bases sizes across branch types

5.5.2 Additional questioning and recommended solution

The 16 shoppers who were offered the correct option (£5.60) as one of several options, were then instructed to ask for a recommendation. Following this request, staff were assessed on the questions they asked:

- 13 were asked about 'contents' – of the 3 shoppers who weren't asked this question, there was 1 each from a Crown, Main and newly franchised Crown
- 13 were asked about a 'signature' – of the 3 who weren't asked this question, 2 assessed a Main and 1 assessed a newly franchised Crown
- 11 were asked about 'value' – of the 5 shoppers who weren't asked this question, 2 assessed a Main, 2 assessed a newly franchised Crown and 1 assessed a privately managed branch
- 10 were asked about 'urgency' – of the 6 who weren't asked this question, 2 assessed a Main, 2 assessed a newly franchised Crown, 1 assessed a Crown and 1 a privately managed branch.
- 10 were asked about 'tracking' - of the 6 who weren't asked this question, 2 assessed a Crown, 2 assessed a newly franchised Crown, 1 assessed a Main and 1 a privately managed branch.

The 16 shoppers who were offered the correct option (£5.60) as one of several options then asked for a recommendation, of which three were offered the correct option ONLY and a further twelve for offered the correct option as one of several options. One shopper was told it would cost £5.15.

5.5.3 Additional questioning and recommended solution – not offered a service spontaneously

The 208 shoppers who were not spontaneously offered a service were instructed to assess what information was requested from the staff member they interacted with:

TABLE 59 FACTORS RELATING TO THE SIZE OF THE PARCEL

	All	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All international parcel visits – not spontaneously offered a service	208	59	37	40	38	34
Staff member asked when the parcel needed to be delivered	57%	61%	65%	45%	55%	56%
Staff member asked if a signature was required	78%	76%	92%	65%	82%	76%
Staff member asked if the item needed to be tracked	63%	66%	59%	63%	71%	56%
Staff member asked about the contents	90%	93%	97%	83%	87%	88%
Staff member asked about the value of the parcel	56%	61%	65%	48%	45%	62%
Staff member asked whether the parcel contained dangerous / prohibited items	47%	56%	41%	48%	42%	44%

The majority of staff asked about contents, but fewer than two thirds of staff overall asked about delivery times, tracking, contents value and whether any items were dangerous or prohibited. Generally, staff in WHSmith branches were least likely to ask questions about these factors.

After asking these questions a range of options were recommended:

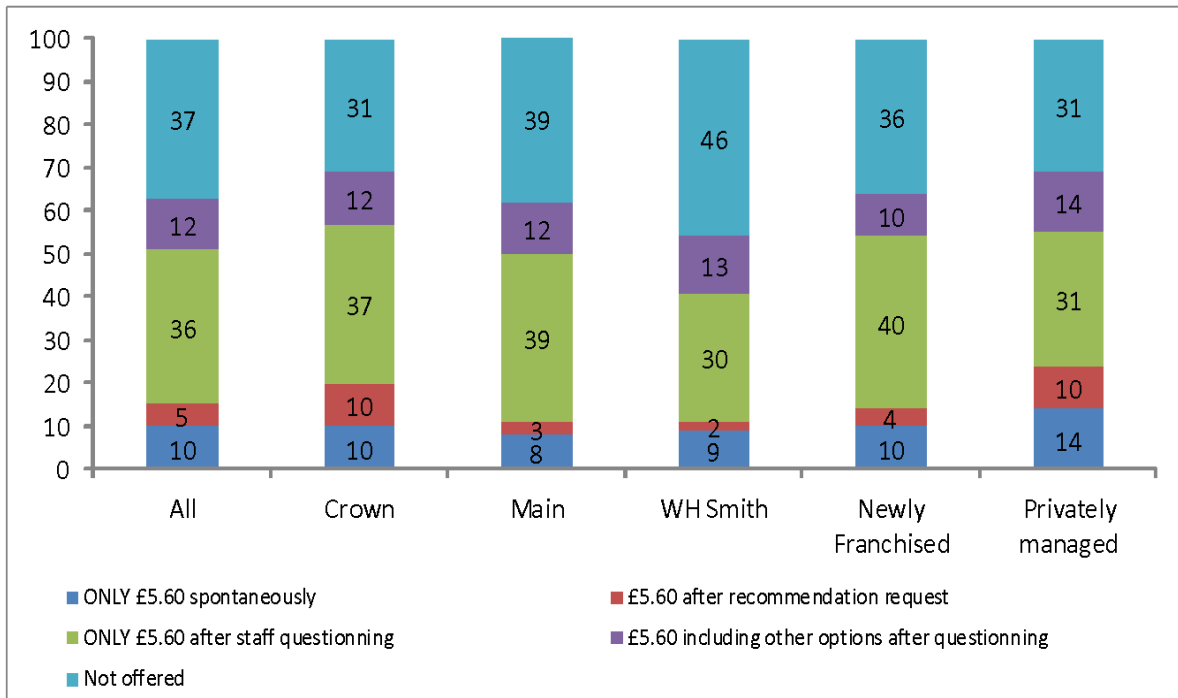
TABLE 60 OPTIONS RECOMMENDED FOLLOWING QUESTIONING

	All	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All international parcel visits – not spontaneously offered a service	208	59	37	40	38	34
Royal Mail international Standard - £5.60 – ONLY	48%	51%	49%	40%	53%	47%
Royal Mail international Standard - £5.60 – plus other options	16%	15%	16%	18%	13%	21%
Royal Mail international Tracked and Signed For	27%	29%	35%	18%	24%	29%
Royal Mail international Economy - £5.40	11%	12%	14%	13%	8%	9%
Parcelforce Worldwide Global Express	1%	3%	3%	0%	0%	0%
Parcelforce Worldwide Global Priority	1%	3%	0%	3%	0%	0%
Parcelforce Worldwide Global Value	1%	3%	0%	0%	0%	0%

Overall 28 of the 281 shoppers (10%) were spontaneously offered the correct option ONLY and a further 15 who were offered a range of options spontaneously were then offered the correct option following a recommendation request (5%). 100 shoppers (36%) were offered the correct option ONLY following questioning and 34 (12%) were offered the correct option alongside other options.

Therefore, 177 shoppers were offered the correct option at some point (including those offered a range of options), equating to 63% overall. Staff in WHSmith were least likely to offer the correct option at any point.

CHART 10 SUMMARY OF OPTIONS



5.5.4 Overview

Overall, of the 281 shoppers who undertook this scenario:

- In over 1 in 4 (26%) visits shoppers were offered a service spontaneously, rising to 1 in 3 (33%) visits to WHSmith branches.
- 177 shoppers (63%) were offered the correct £5.60 option either as the ONLY option or a range of option, spontaneously or after questioning.
- 104 shoppers (37%) were not offered this option as at all, increasing to 46% in WHSmith branches.
- Of those who weren't offered the correct option initially, there were differences in the proportion of staff asking about specific issues relating to the package.

Of all the main scenarios, those enquiring about sending an international parcel were least likely to be recommended the correct option; and whilst over three quarters of staff asked about the contents and a requirement for a signature, less than two thirds asked additional questions. The level of questioning was particularly low in WHSmith branches, which may account for the lower number of correct recommendations.

5.6 Cash withdrawal

This scenario was undertaken as a post office transaction and not by using cash-back, unless no other option was available. The shopper asked if they could withdraw cash over the counter using their debit card and instructed not to pay for anything else at the same time with that card. They also asked whether there was any limit on the amount of cash that could be withdrawn and whether it was possible to make deposits at the post office. They withdrew between £20 and £100 and the scenario was designed to test whether the cash withdrawal service was available in branch

In total, 480 shoppers conducted the cash withdrawal scenario, including 289 in Post Office Locals and 191 in sub-post office branches. This scenario was not undertaken across the other branch types.

A range of bank cards were used representing the major banking groups in the UK, including Barclays (15%), Santander (14%), HSBC (11%), NatWest (11%), Lloyds (10%), Halifax (10%), Nationwide (9%) and a range of other providers including the Co-op, RBS, TSB, First Direct and the Bank of Scotland.

5.6.1 Ability to withdraw cash

Of the 480 assessments, 458 shoppers (95%) were able to successfully withdraw cash (not via cash-back), with 97% able to do so in sub-post office branches compared to 94% in PO Locals.

Of the 22 shoppers who could not withdraw cash, 14 were told to use a cash machine at the post office or to go to an alternative bank branch as follows:

Sub-post office	The member of staff advised me to use the automated system.
Sub-post office	The member of staff then suggested I use a Bank ATM, unfortunately there was not one in the village. Again, they apologised for any inconvenience.
Sub-post office	They said you can use the machine any time. Thus I told him that I was going to withdraw a limited amount of £5.
Sub-post office	The member of staff told me to go to the cash machine or the bank.
PO Local	Shoppers told to use cash machine or another bank branch
PO Local	There was a chargeable cash machine present in this branch.
PO Local	I was advised that there was a cash machine at the back of the branch.
PO Local	I was advised there was a free of charge cash machine at the back of the store.
PO Local	The member of staff suggested the cash machine in the shop.
PO Local	I was informed of a free of charge Cashpoint outside.
PO Local	There was a chargeable cash machine present in the branch.
PO Local	There was a cash machine in the shop.
PO Local	The member of the staff told me to use the cash machine inside the branch.

Of the 458 shoppers who were able to withdraw cash, 200 (44%) were told there was a cash limit, because of the following restrictions:

- Limit imposed by the bank – 82%
- A limit imposed by the Post Office – 8%
- Policy to restrict the amount of cash that can be withdrawn at any one time – 4%
- The post office branch was running low on cash – 2%

The limits were based on open-ended feedback from shoppers:

Staff response	Number of shoppers and percentage Base: 200
Dependent on the bank	130 (65%)
£300	31 (15.5%)
Less than £300	24 (12%)
Over £300	15 (7.5%)

Shoppers were then instructed to state that they wanted to make frequent cash withdrawals, with just over half (51%) being told that there was a cash limit, with a variety of responses given based on open-ended feedback:

Staff response	Number of shoppers and percentage Base: 101
Dependent on the bank	53 (52%)
£300	19 (19%)
Less than £300	15 (15%)
Over £300	7 (7%)
Something else	7 (7%)

Two shoppers (less than 1%) were able to withdraw cash via cash-back (which is not permitted), including 1 shopper at a sub-post office branch and 2 shoppers at PO Locals.

Finally, 407 of the shoppers who were able to withdraw cash asked whether they could make a deposit into their account. Excluding those customers with a Nationwide or Bank of Scotland account, 84% were told they could make a deposit and 16% were told they could not. A variety of reasons were given why they could not deposit; however this enquiry was also undertaken by other shoppers at a more in-depth level across every branch type, with the findings outlined below.

5.6.2 Overview

Overall, of the 480 shoppers who undertook this scenario:

- 95% were successfully able to withdraw cash (not via cash-back)
- 44% of those shoppers were told there was a limit, with the majority (82%) being told that the limit was imposed by the bank. The information relating to cash limits varied.
- 51% of shoppers who were able to withdraw cash were also told that there was a limit on the frequency of cash withdrawals.

In summary, whilst the majority of shoppers were able to withdraw cash, the level of information provided about limits and frequency of cash withdrawals was inconsistent.

5.7 Cash deposit

This scenario was undertaken as a post office transaction and was not conducted at the same time as the cash withdrawal scenario.

The shoppers were instructed to withdraw between £50 and £100 prior to visiting the branch and were instructed to ask at the counter if they could deposit cash into their account. They were also instructed to ask whether there was any limit on the amount of cash that could be deposited and whether there were limits on the number of payments.

Shoppers were instructed to check whether their bank account was accepted by the Post Office in terms of cash deposits and to use a personalised / barcoded paying in slip from their bank if the indications were that this was required.

Overall, 682 shoppers undertook this scenario across all branch types:

TABLE 61 NUMBER OF CASH DEPOSIT ASSESSMENTS PER BRANCH TYPE

Total	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
682	114	286	77	49	54	50	52

A range of bank accounts were used by shoppers to make their deposit, as follows:

- Barclays – 19%
- Santander – 18%
- HSBC – 11%
- Halifax – 8%
- Lloyds – 8%
- NatWest – 8%
- First Direct – 6%
- TSB – 5%
- RBS – 5%
- Co-op – 4%

A small number of shoppers enquired about making a cash deposit into a Nationwide (19 shoppers) or Bank of Scotland account (5 shoppers). However, this is not possible at the Post Office and, therefore, these shoppers have been excluded from the following analysis, meaning that the data is based on the following assessment numbers:

TABLE 62 NUMBER OF COMPLETED CASH DEPOSIT ASSESSMENTS PER BRANCH TYPE

Total	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
658	110	277	76	45	50	49	51

5.7.1 Ability to deposit cash

Overall, 71% of shoppers were able to deposit their cash, with differences across branch type as follows:

TABLE 63 ABLE TO DEPOSIT CASH BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Cash Deposit scenario visits	658	110	277	76	45	50	49	51
Yes	71%	77%	68%	75%	80%	70%	65%	61%

A number of reasons were given by staff to people who could not deposit cash including the fact that the staff member was unsure of what to do (or needed another staff member), the service was not available or that the customer needed a personalised / barcoded paying-in slip.

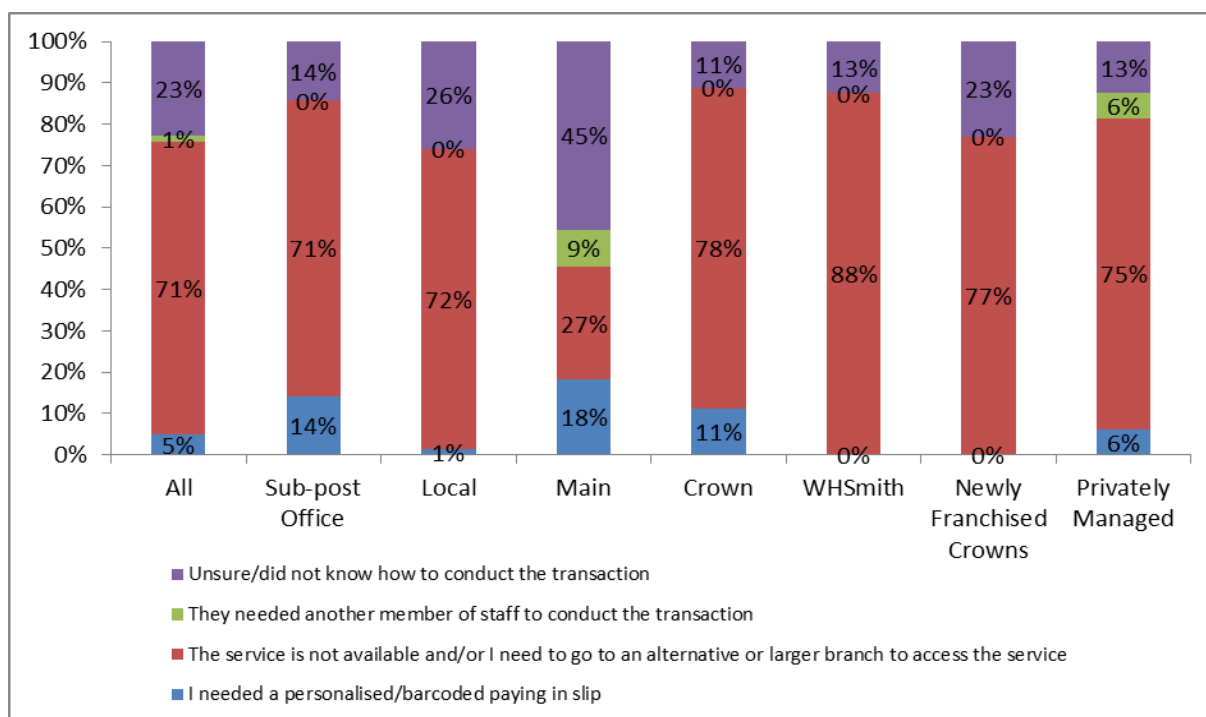
According to the POL website, cash deposits can be made to the following current accounts, but only if the customer has a paying-in slip – Cahoot, Halifax, Handelsbanken, Lloyds, NatWest, RBS, TSB and Ulster Bank. As such, those cases where shoppers with those accounts were told they could not deposit cash, because they needed a paying-in slip were classified as legitimate reasons. Therefore, shoppers with the banks account listed who were told they needed a paying-in slip have been excluded from the following analysis.

TABLE 64 ABLE TO DEPOSIT CASH BY BRANCH TYPE (EXCLUDING THOSE GIVEN THE CORRECT INFORMATION ABOUT PAYING-IN SLIPS)

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Cash Deposit scenario visits excluding those given a legitimate reason	628	103	266	69	49	47	46	48
Yes	78%	86%	74%	84%	82%	83%	72%	67%

The 22% of shoppers who were unable deposit their cash (n=140), were provided with a number of reasons:

CHART 11 REASONS FOR NOT DEPOSITING CASH*



*Low base for specific branch types

Whilst care must be taken over base sizes (the most common reason for shoppers being told that they could not deposit money was because the service was not available. In PO Main branches the most common reason given was that a personalised / barcoded paying in slip was required.

It should be noted that those shoppers with a Barclays current account should have been to deposit cash using either chip and PIN or a paying-in slip and, therefore, these customers were included in the chart above. However, 4 shoppers using a Barclays current account were told they needed a paying-in slip when this was not correct.

5.7.2 Cash deposit limits

Only 11% of shoppers (n=53) who were able to make a deposit were told there was a limit, with a range of responses given based on open-ended feedback:

Staff response – cash deposit limit in a single transaction	Number of shoppers and percentage Base: 53
Dependent on the bank	9 (17%)
£1,000	20 (38%)
Less than £1,000	4 (8%)
More than £1,000	18 (34%)
Something else	3 (6%)

Of the 53 shoppers who were told there was a limit, a number of reasons were given:

- Limit imposed by the bank – 26%
- A limit imposed by the Post Office – 21%
- Policy to restrict the amount of cash that can be withdrawn at any one time – 13%

The 53 shoppers who were informed that there was a limit were then instructed to state that they would need to use the deposit service frequently, of which 24 shoppers were told there was no limit and in one case the shopper was not given an answer. Of the remaining 28 shoppers (55%) a range of responses given based on open-ended feedback, as follows:

Staff response – cash deposit limit if service used frequently	Number of shoppers and percentage Base: 28
Dependent on the bank	2 (7%)
£1,000	11 (39%)
Less than £1,000	3 (11%)
More than £1,000	12 (43%)

5.7.3 Overview

- 78% of shoppers were able to successfully deposit cash based on their requirements of their account, falling to 67% in privately managed branches.
- The main reason given for not being able to deposit cash was because the service was not available and that the shopper needed to use a larger branch.
- Of those shoppers who were able to make a deposit, a range of information was provided about limits and the reason why limits were imposed.

In summary, there were inconsistencies in the proportion of shoppers who were able to deposit cash and inconsistencies in the level of information provided.

5.8 Business deposit enquiry

Shoppers enquired whether it was possible to make business cash deposits at the post office. If asked, they said it would be around £2,500-£3,000 every couple of weeks and they were provided with a list of banks to say they used. If not told spontaneously, they asked whether there was any limit to the amount of cash you could deposit at any one time.

The scenario was designed to test whether customers were provided with correct information about the business deposit service.

This enquiry was conducted by 185 shoppers in total, all in Post Office Local branches.

5.8.1 Ability to use the business banking services.

Of the 185 shoppers who undertook the scenario:

- 69% were asked which bank the business uses
- 53% were asked by a member of staff how much they wanted to deposit
- 35% were asked how often they wanted to deposit cash

Overall, 54% of shoppers were told spontaneously that they could make deposits at the post office branch they assessed and 29% were told following a shopper prompt. As such, 17% were told they could not make a deposit.

In these assessments (n=32), 7 shoppers were told they would have to use a larger branch, 4 were told they couldn't make deposits at the post office per se and 21 were told something else, with examples shown below:

'They informed me that they used to be a main post office and was not sure what the process was.'

'I was asked what bank I was with and I replied, HSBC. The member of staff was unsure and asked for the bank card associated with the business account, which I said I did not have on me. They explained that they could not tell if I could make business deposits without it, as when they enter the card into the reader, it tells them if it is possible with that account. The member of staff asked me to bring in my business bank card the next time I came in and they could find out then.'

'I was told that they do not offer this method.'

'The member of staff did not know if they could offer this service and suggested that I should ask my bank.'

A series of additional elements were also assessed by the 153 shoppers who were told they could make a deposit.

In 35% of assessments the staff member confirmed that deposit of up to £3,000 could be made and 18% were told the deposits would have to be broken down into smaller amounts. 12% were told there was no limit and 8% of shoppers reported that the staff member did not know. Of the remainder 19% said the amount was less than £3,000 and 1% said over £3,000.

28% of shoppers were told that a paying-in book was required, with 11% told a paying-in book with a barcode was needed. 10% were told they needed a bank card and 1% were told they needed either a paying-in book or a bank card. 2% of shoppers stated that the staff member didn't know and 45% were told nothing in terms of the specific requirements about using the business deposit service. 2% were told 'something else'.

In terms of the frequency of payment, 73% were told they could make payments as often as they liked and 7% were told there were limits on frequency (with responses including 'up to £2,000' or '£1,000'). A further 7% of shoppers stated that the staff member didn't know and 8% were not told anything. A further 7% were told something else.

In terms of other methods of depositing money, 32% were told about Chip and PIN, 11% were told about enveloped cheque deposit, but the majority (56%) were not informed about other methods.

Finally, only 31% were told that cash deposits could only be made from certain bank accounts, with various combinations of banks given.

5.8.2 Overview

- 83% of shoppers were told that deposits could be made at the post office they visited, including 54% who were told this spontaneously and 29% who had to prompt.
- Just over a third (34%) of those who could make a deposit confirmed that a deposit of up to £3,000 could be made; and a range of responses were given in relation to other factors such as paying-in books, methods of depositing money etc.

In summary, whilst a high proportion of shoppers were told that deposits could be made, there were inconsistencies in the provision of information relating to the deposit.

5.9 Passport Check and Send

This scenario involved shoppers informing the member of staff that their passport was due to expire in about 3 to 4 months' time and asking if the branch provided the Passport Check and Send service in order to establish whether the service was available.

The aim of the assessment was to establish if the service was available, what information was provided by staff members including what the next steps were, what documentation was needed, how long the process takes and any associated costs. Where the service was not available, shoppers recorded if they were provided with any further information on how to access the service.

Overall, 586 shoppers undertook this scenario across all branch types:

TABLE 64 NUMBER OF PASSPORT CHECK AND SEND ASSESSMENTS PER BRANCH TYPE

Total	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
586	116	198	77	49	54	41	51

5.9.1 Passport check and send service offered.

43% of shoppers undertaking this scenario were told that the service was provided at the branch and 20% were provided with leaflets and / or an application form. There were differences by branches type:

TABLE 65 PASSPORT CHECK AND SEND SERVICE OFFERED AND LEAFLET PROVIDED BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Passport Check and Send Scenarios	586	116	198	77	49	54	41	51
Service offered in branch	43%	10%	3%	62%	100%	94%	100%	90%
Leaflets and/or application form offered	20%	12%	3%	47%	90%	94%	87%	86%

All Crown, WHSmith, newly franchised Crown and privately managed branches should offer this service and the response rate should, therefore, be 100%.

There is a more patchwork offering of the service at sub-post offices which is based on location, demand for the service and other nearby branches offering it. PO Mains will only offer the service if it was offered prior to the branch converting to a Main model. As such, it is difficult to establish whether shoppers were provided with the correct information or not, however the findings provide an indication of the availability of the service at these branches more widely. Only 1 visit to a sub-post office and PO Main respectively in which the shopper was informed the service was unavailable, Passport Check and Send should have been available.

The service does not form part of the offering at PO Locals and, therefore, it is surprising that 3% were told the service was offered.

Overall there was a very low level of information on aspects of the Passport Check and Send service provided to shoppers, however this generally improved at branches where the service should be offered universally:

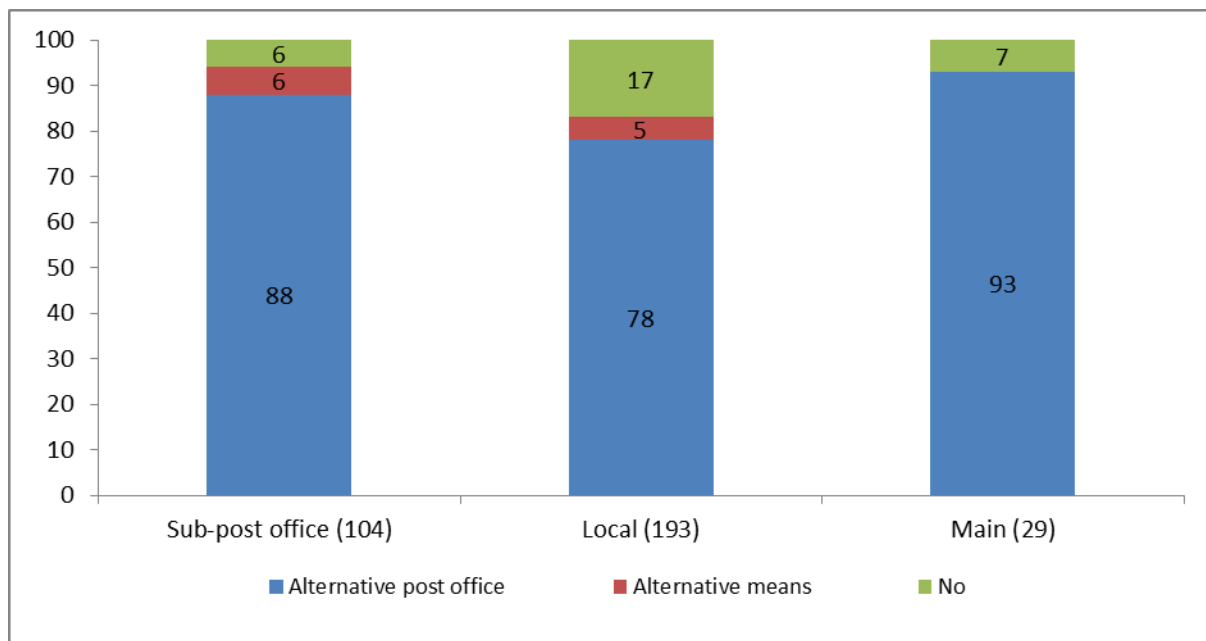
TABLE 66 EXPLANATIONS BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly Franchised Crowns	Privately managed
All Passport Check and Send scenarios	586	116	198	77	49	54	41	51
Staff member explained what needed to be done	42%	30%	16%	62%	82%	70%	71%	55%
Staff member explained once the documentation has been returned	22%	3%	2%	36%	51%	48%	54%	33%
Staff member explained what time the shopper needed to come to the branch	6%	2%	1%	5%	24%	11%	12%	6%
Staff member explained how long the application process would take	17%	1%	3%	26%	57%	35%	34%	27%
Staff member explained how much the service would cost	33%	7%	3%	51%	84%	70%	83%	61%

Of the 334 shoppers who were told that the Passport Check and Send service was not available, the majority were given an alternative post office.

No shopper accessing a Crown or a newly franchised Crown branch and only a small number of shoppers in privately managed branches (n=5) and WHSmith (n=2) were told the service wasn't available. Therefore, these branch types are not included in the following chart:

CHART 12 ALTERNATIVES FOR PASSPORT CHECK & SEND (IN BRANCHES WHERE NOT OFFERED)



5.9.2 Overview

- 100% of shoppers in Crown and newly franchised branches were told that the Passport Check and Send service was available. Over 90% of privately managed and WHSmith branches did so, but the picture was more mixed across the other branch types.
- The majority of shoppers in those branches where the service was not available were given an alternative post office.

In summary, the majority of shoppers were offered the service where available, but not all. Where the service was not available, a small proportion of shoppers were not given an alternative increasing to over one in six in PO Local branches.

5.10 Local Collect (re-delivery) and Amazon shopping

Shoppers were instructed to tell the member of staff they had received a red 'something for you' card and wondered whether they could have the parcel delivered to that post office branch. If shoppers were asked about the contents and size of the parcel, they were instructed to say that it was a pair of trainers, the size of a small parcel.

Shoppers were instructed to ask further questions about re-arranging the re-delivery including restrictions and ID requirements; if the staff member said it was possible to have the item re-delivered.

Overall, 463 shoppers undertook this scenario across all branch types:

TABLE 67 NUMBER OF LOCAL COLLECT / AMAZON COLLECTION QUERIES PER BRANCH TYPE

Total	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
463	96	101	71	52	54	42	47

5.10.1 Availability of Local Collect service

84% of shoppers were told they could use the service, with differences by branch type:

TABLE 68 LOCAL COLLECT SERVICE AVAILABLE BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Local Collect visits	463	96	101	71	52	54	42	47
Yes – parcel could be delivered to that branch	84%	90%	81%	83%	87%	83%	86%	79%

Shoppers who were told they could use the service then asked how to arrange redelivery of their parcel, if there are any time restrictions in being able to do so and if there is a charge:

TABLE 69 FACTORS RELATING TO LOCAL COLLECT SERVICE BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All told the Local Collect service was available	390	86	82	59	45	45	36	37
Collection could be arranged by calling the number on the Royal Mail or ParcelForce card	68%	64%	65%	73%	87%	83%	86%	79%
Told that 48 hours or two working days notice is required for re-delivery	38%	28%	38%	36%	47%	42%	42%	49%
Specified a 70p charge	47%	43%	43%	54%	47%	42%	58%	51%

Aside from the 68% who were told to call the Royal Mail or ParcelForce number, 6% were told how to arrange a pick-up in branch, 6% were told to go online and 2% were told something else. 18% were not told how they could arrange the collection.

60% of shoppers were not informed of any time restrictions and 38% of shoppers were told that 48 working hours or 2 working days notice was required. 2% (8 shoppers) were told something else.

Finally, 47% of shoppers were told there was a 70p charge and 43% were told there was no charge. 6% of shoppers said the staff member was unsure and the remaining 4% said a range of options was given ranging

from 75p to £1.50.

There were also differences by branch type in terms of what shoppers were told about the proof of ID they required to pick up the parcel, with sub-post offices least likely to provide this information:

TABLE 70 LOCAL COLLECT SERVICE AVAILABLE BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All told the Local Collect service was available	390	86	82	59	45	45	36	37
Told to bring the Royal Mail or Parcelforce card	61%	50%	60%	64%	64%	56%	72%	76%
Told to bring proof of identity	62%	48%	57%	69%	64%	67%	69%	73%

The 73 shoppers who were told that the service was not available, 9 (12%) were told that the branch did not have enough space to store the parcel (including 5 shoppers who assessed a Main branch) and 2 shoppers (3%) were informed that the parcel was too large or heavy (one each from privately managed and WHSmith).

The remaining 62 shoppers (85%) were given another reason, with examples shown below

Privately managed	I was told I could only get it sent to the address on the back of the card and I should check this.
PO Local	The member of staff did not know if the parcel could be re-delivered to the branch.
PO Local	The member of staff said that they did not offer this service but the Co-op did and that it was just a short way down the road.
Privately managed	The member of staff said they were not aware of the service or how it worked.
Privately managed	Royal Mail parcels would be delivered across the road but the member of staff checked in case my parcel had been delivered to the branch.
Privately managed	The member of staff said that their colleague who was not yet in would be better to explain how it works.

5.10.2 Local Collect overview

- Overall 84% of shoppers were told they could use the post office branch for this service.
- 16% of shoppers were told they could not use the post office branch they visited including 21% at privately managed branches and 19% at PO Locals.
- There were inconsistencies in terms of the information provided including the contact methods to use for more information, the charge and how much notice was required.

5.10.3 Availability of Amazon collection service.

All shoppers who undertook a Local Collect scenario were also instructed to ask if it was possible to have items purchased via Amazon to be delivered to that post office branch.

Shoppers were instructed to assess whether information was provided about alternative locations (if they were told the branch did not accept deliveries) or whether the staff mentioned size and weight limits (if deliveries were acceptable).

As this enquiry was undertaken in conjunction with the Local Collect scenario 463 assessments were made in total.

Overall, the Amazon service was offered in 87% of assessments, with branch type splits shown below:

TABLE 71 AMAZON SERVICE AVAILABLE BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All Amazon visits	463	96	101	71	52	54	42	47
Yes – the Amazon parcel could be collected from the branch	87%	85%	82%	93%	98%	83%	83%	83%

Shoppers who were told they could use the service assessed a number of factors, but overall there were very few discussions around parcel size and weight limits or the fee:

TABLE 72 FACTORS RELATING TO AMAZON SERVICE BY BRANCH TYPE

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All told the Amazon collect service was available	390	86	82	59	45	45	36	37
Staff mentioned there was a limit to the parcel weight	8%	12%	4%	8%	10%	13%	6%	8%
Staff mentioned there was a limit to the parcel dimensions	5%	6%	1%	5%	8%	9%	6%	8%
Staff mentioned a fee for a service	9%	8%	7%	9%	12%	13%	9%	10%

The 33 shoppers who were told about size limits, the majority (18) were not given told a specific limit.

The 59 (13%) shoppers who were told the parcel could not be collected from the branch, 12 (20%) were told there was not enough space in the branch (including 7 assessing PO Locals and 3 assessing PO Mains), 11 shoppers (19%) were told they needed to get the parcel delivered to a larger branch (including 4 assessing PO Locals and 5 assessing sub-post offices) and 2 shoppers (3%) were told the parcel would be too large / heavy.

A further 34 shoppers (58%) were given another reason, with examples shown below:

PO Local	The member of staff did not know whether I could collect a parcel from the branch.
Sub-post office	Only if I clicked and collected could I pick up from this post office.
Privately managed	The member of staff said they were not aware of the service.
Privately managed	The member of staff did not have Royal Mail parcels delivered to as they were dealt with across the road at the Sorting Office.
Privately managed	The member of staff had not enough knowledge about it.
Privately managed	This service was no longer offered at this branch.
Newly franchised Crowns	The member of staff said, "You cannot have items sent here directly."

10 shoppers (17%) were suggested an alternative location, as shown below:

Privately managed	It could be delivered across the road.
Privately managed	The main post office in Portsmouth.
Newly franchised Crowns	I was advised that I may be able to get it delivered to a local sorting office.
Newly franchised Crowns	I was told I could arrange a suitable time for a home delivery.
WHSmith	The depot where the parcel is kept was suggested.
Local	There was the main post office for Burnley in WHSmith, The Mall.
Local	The other option suggested was for me to travel to the local post office collections office.
Sub-post office	It was suggested that I try one of the larger post offices in town.
Local	I was informed this was available at larger branches like Prestatyn.
Newly franchised Crowns	I was told I needed to use the new Delivery Office in the same parade.

5.10.4 Amazon overview

- Overall 87% of shoppers were told they could use the post office branch for this service.
- Differences were noted by branch type with Main and Crown branches more likely to offer the service than Local branches.
- There were inconsistencies in terms of the information provided including the contact methods to use for more information, the charge and how much notice was required.

5.11 Parcel weight limit enquiry

Shoppers were instructed to say that they were a frequent user of eBay and would like to use the post office to send out packages to other locations in the UK. If asked by the member of staff, shoppers were instructed to say the parcels would usually be between 7 and 15kgs, that nothing restricted or prohibited would be contained and that the parcels would not larger than 61cm in length, 46cm wide and 46cm in depth.

If not mentioned, shoppers were instructed to prompt about the weight limit and maximum size.

This scenario was only undertaken in PO Locals (92 assessments) and sub-post offices (93 assessments) with 185 assessments overall.

All shoppers conducting this scenario said they were a regular user of the service.

5.11.1 Information relating to parcel weight.

After stating that they are a regular user of the service 51% overall were told there was a weight limit, including 46% of shoppers assessing a PO Local and 57% of shoppers assessing a sub-post office. A range of weight limits were provided to shoppers:

Staff response	Number of shoppers and percentage Base: 95	PO Locals Base: 42	Sub-post office Base: 53
2Kg	29 (31%)	11 (26%)	18 (34%)
10Kg	2 (2%)	1 (2%)	1 (2%)
18Kg	1 (1%)	0	1 (2%)
20Kg	25 (26%)	14 (33%)	11 (21%)
30Kg	16 (17%)	5 (12%)	11 (21%)
70Kg	1 (1%)	0	1 (2%)
Leaflet given	17 (18%)	10 (24%)	7 (13%)
Something else	4 (4%)	1 (2%)	3 (6%)

All shoppers then asked if there is a maximum weight limit in place with a wide variety of responses recorded. Out of 185 shoppers 12% were told no limit and 17% were offered a leaflet. 27% were told there was a 20Kg limit, compared to 19% given a 2Kg limit and 10% a 30Kg limit. A range of other options were given.

Finally, 26% of shoppers were told there was a maximum dimension size on parcels posted at the post office, compared to 30% of those assessing a Post Office Local branch and 22% of those assessing a sub-post office. Of the 48 shoppers who discussed the dimensions, 13 were given a leaflet and 13 were shown a box template.

5.11.2 Parcel weight limit summary

- Just over half were given a weight limit, with a variety of responses given.
- In addition, there were inconsistencies in the responses relating to the maximum weight.

6 Overall Visit Success

This section examines how successful each visit was in terms of shoppers being able to complete their assessment to the agreed standard, based on the provision of correct information.

In order to establish a measure of ‘visit success’ a number of variables have been examined:

1. Whether the branch was open and providing Post Office services as advertised.
2. Whether the shopper was informed that the following services were unavailable or not, based only on the branches in which they were carried out:
 - a. Cash withdrawal
 - b. Cash deposit (excluding those not using a suitable bank account or those without a paying-in slip)
 - c. Business deposit enquiry
 - d. Passport Check and Send (only for branches where the service is meant to be provided – i.e. excluding sub-post offices, PO Locals and PO Mains)
 - e. Local Collect
 - f. Amazon collection
3. Whether the shopper was offered the correct service for the **Mail** scenario they were undertaking.

In total, 1,813 shoppers visited 1,638 post offices. No branch was visited twice, with the exception of WHSmith and newly franchised Crown branches. Each WHSmith branch was visited twice and every newly franchised Crown was visited three times.

Overall 24 shoppers were unable to undertake their assessments, either because the branch was closed despite being visited during opening hours (12), the branch was open, but Post Office services were not available (5) or because the branch was open, but the post office serving positions were closed (7). Therefore, 24 assessments were failed assessments spread across 21 Locals, 2 sub-post offices and 1 privately managed.

These 24 shoppers were due to conduct a range of mail scenarios as follows:

- 5 second class large letter
- 6 Signed For second class letter
- 4 Signed For second class small parcel
- 9 Special Delivery

In addition, to the following non-mail scenarios:

- 10 cash deposit
- 14 cash withdrawal
- 10 business cash deposit
- 6 parcel weight limit
- 2 Local Collect & Amazon
- 4 Passport Check & Send

Therefore, in reality, customers wishing to undertake these transactions would have been unable to do so.

TABLE 73 PROPORTION OF ASSESSMENTS WHICH COULD NOT BE UNDERTAKEN

	All	Sub-post office	Local	Main	Crown	WHSmith	Newly franchised Crowns	Privately managed
All visits	1913	307	600	302	150	162	141	151

Unable to undertake the assessment	1%	1%	4%	0%	0%	0%	0%	1%
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The remaining 1,789 shoppers who were able to assess the branch, undertook a total of 4,574 scenarios including 1,996 mail enquiries and 2,578 non-mail enquiries. Each of the scenarios have been analysed separately to assess whether the enquiry was dealt with 'correctly' by staff (defined as a 'pass') or not dealt with correctly (defined as a 'fail'). These definitions are shown below:

Scenario	Pass	Fail
Second class large letter	75p stamp recommended either as the only option or a range of options (at any point of the enquiry)	75p stamp not recommended
Special Delivery	Special Delivery recommended	Special Delivery not recommended
Royal Mail Signed For second class letter	£1.65 stamp recommended either as the only option or a range of options (at any point of the enquiry)	£1.65 not recommended
Royal Mail Signed For small parcel	£3.95 stamp recommended either as the only option or a range of options (at any point of the enquiry)	£3.95 not recommended
Cash withdrawal	Could withdraw cash (not via cash-back)	Could not withdraw cash OR used cash-back
Business deposit	Told they could use the branch	Told they could not use the branch
Bill payment enquiry	Told they could use the branch	Told they could not use the branch
Local Collect	Told they could use the branch	Told they could not use the branch
Amazon	Told they could use the branch	Told they could not use the branch
Parcel weight¹⁰	Given a limit of 20Kg or over	Given a weight limit under 20Kg

Overall, 85% of the 1,996 mail scenarios passed, as outlined below. Two of the five scenarios achieved a 'pass' rate of over 90%; two scenarios (both Royal Mail Signed For) achieved a 'pass rate' of over 80%; however the international parcel scenario only achieved a pass rate of 63%.

TABLE 74 SCENARIOS DEFINED AS PASS OR FAIL (MAIL SCENARIOS)

	Total – Mail scenarios	2nd Class Large Letter	Special Delivery	Royal Mail Signed For 2 nd class*	Royal Mail Signed for 2 nd Class small parcel	International Parcel**
Base	1996	481	477	278	480	280
Pass	1695 (85%)	448 (93%)	452 (95%)	226 (81%)	392 (82%)	177 (63%)
Fail	301 (15%)	33 (7%)	25 (5%)	52 (19%)	88 (18%)	103 (37%)

*PO Locals and sub-post offices only / **PO Mains, Crowns, WHSmith, Newly Franchise and privately managed only

As highlighted in the main report, there were differences by branch type, as outlined below:

- Second class large letter – shoppers were most likely to be recommended the correct option in privately managed branches (98%) and least likely in Crown branches (90%)
- Special Delivery – shoppers were most likely to be recommended the correct option in Crown branches (100%) and least likely in PO Locals (89%)
- Royal Mail Signed For letter – there was little difference between PO Locals and sub-post offices, with 81% being offered the correct option across both branch types.
- Royal Mail Signed For small parcel – shoppers were most likely to be recommended the correct option in PO Local and WHSmith branches (85%) and least likely in newly franchised branches (78%).

¹⁰ Where shopper provided with a specific limit.

- International parcel – shoppers were most likely to be recommended the correct option in Crown and privately managed branches (69%) and least likely in WHSmith branches (54%).

In conclusion, no branch type performed consistently across all mail scenarios; with certain branch types performing well on some scenarios, but less well on others.

TABLE 75 SCENARIOS DEFINED AS PASS OR FAIL (NON-MAIL SCENARIOS)

	Total – Non-mail scenarios	Cash withdrawal*	Cash deposit	Business deposit**	Passport Check***	Local collect	Amazon collect	Parcel weight limit enquiry
Base	2507	480	628	185	195	461	463	95
Pass	2122 (85%)	458 (95%)	488 (78%)	153 (83%)	187 (96%)	390 (84%)	404 (87%)	42 (44%)
Fail	385 (15%)	22 (5%)	140 (22%)	32 (17%)	8 (4%)	71 (16%)	59 (13%)	53 (56%)

As highlighted in the main report, there were differences by branch type, as outlined below:

- Cash withdrawal – little difference between the two branches types, although 97% were successfully able to withdraw cash in sub-post offices compared to 94% in PO Locals.
- Cash deposit – shoppers were mostly likely to access the service at a sub-post office (86%), PO Main (84%) and Crown (82%). This dropped to 67%, 72% and 74% of visits to privately managed, newly franchised Crowns and PO Locals respectively.
- Passport Check and Send – 100% of shoppers assessing Crown and newly franchised branches were able to access the service at these branches compared to 94% in WHSmith and 90% in privately managed branches.
- Local Collect - shoppers were most likely to be told they could have the parcel re-delivered in sub-post offices (90%) and least likely in privately managed branches (79%).
- Amazon Collect - shoppers were most likely to be told they could have the parcel re-delivered in Crown branches (98%) and least likely in PO Locals (82%).
- Parcel weight limit – based on all those shoppers who were told there was a limit (51%), less than half (44%) were told the limit was 20Kg or more. The remainder were either given a leaflet or told the limit was lower.

In conclusion, no branch type performed consistently across all non-mail scenarios; with certain branch types performing well on some scenarios, but less well on others.

7 Specific Comparisons by Branch Type

The report has focussed on the key topline findings, in addition to analysing the data by key splits such as branch type. However, as previous studies have focussed on specific branch types (e.g. PO Locals vs sub-post offices) it is important to provide a more specific summary of any differences at a branch level.

Therefore, the following section of the report focusses on any differences between different models of post offices to understand how consumer experiences may vary between PO Locals and sub-post offices, for example. It is particularly important to understand and benchmark branch performance now that the NTP is in its final year.

7.1 PO Locals vs sub-post offices overview

GfK undertook the 'research into the quality and consistency of service standards and product knowledge' mystery shopping in 2016, focussing on PO Locals and sub-post offices; and where appropriate we have compared the performance from 2017 to 2016.

In 2016, the mystery shopping exercise covered 602 assessments with PO Locals and 299 assessments with sub-post office branches, compared to 600 PO Locals and 307 sub-post offices in 2017.

7.1.1 Exterior

The proportion of PO Locals displaying opening hours fell slightly in 2017; however the proportion of branches where the opening hours matched those on the website did increase.

In 2016, **only** those assessing a PO Local were asked whether the branch displayed opening hours with 78% saying 'yes'. This fell slightly to 74% in 2017 – including 69% who said the opening hours were displayed prominently and 5% who said they were not prominent – compared to 75% overall in sub-post offices.

The data does indicate a slight increase in the proportion of PO Locals referring to Post Offices services on the door or window of the outlet, from 63% in 2016 to 70% in 2017. This question was not asked in 2016 for sub-post offices, however in 2017 the figure was 46%, significantly lower than in PO Locals.

There was a slight decrease in the proportion of PO Local branches with an entrance wide enough for wheelchair access, falling from 90% in 2016 to 88% in 2017; and sub-post offices continue to fall below the average for PO Locals falling from 83% of branches with a wide enough entrance in 2016 to 79% in 2017.

In 2016, 74% of shoppers in PO Locals stated that the entrance to the branch was wide enough for wheelchair access and flat, with a further 8% stating that whilst the entrance was not flat, there was a ramp present. This compared to 69% in 2017 saying the entrance was wide enough and flat; and 11% saying the entrance was not flat, but a ramp was present.

For those visiting a sub-post office in 2016, 71% stated that the entrance was wide enough and flat, with a further 8% stating that whilst the entrance was not wide enough there was a ramp. This compared to 57% and 11% respectively in 2017.

Therefore, whilst there have been some changes since 2016, sub-post offices are still less likely to provide sufficiently wide doors and ramps, where needed, for wheelchair access.

In terms of car parking, there was little change from 2016. In 2017, 81% of shoppers assessing PO Locals and 79% of those assessing sub-post offices stated that there was car parking available nearby, compared to 83% and 81% respectively in 2016.

Finally, it is important to note that 4% of shoppers assessing PO Locals in 2017 were unable to complete their assessment (due to the post office being closed), compared to only 2% in 2016. The equivalent figure for sub-post offices was 1% year-on-year.

7.1.2 Interior

The analysis of the branch interior was based on 579 PO Local assessments and 305 sub-post office assessments in 2017; compared to 587 and 297 assessments respectively in 2016.

The level of trade in PO Locals remained very similar between 2016 and 2017. In 2016 19% of shoppers stated that the branch was either fairly or very busy and 46% stated that the branch was very quiet, compared to 18% and 45% respectively in 2017. However, the data indicated an increase in the level of trade with the sub-post office branches, with only 43% of branches described as 'very quiet' as follows:

TABLE 76 LEVEL OF TRADE IN SUB-POST OFFICE BRANCHES YEAR-ON-YEAR

	2016		2017	
	Sub-post office	Local	Sub-post office	Local
How would you describe the level of trade in the branch during your visit?	297	587	305	579
Extremely busy	1%	1%	2%	2%
Fairly busy	13%	18%	19%	16%
Fairly quiet	26%	35%	37%	37%
Very quiet	60%	46%	43%	45%

In terms of interior access for wheelchairs, PO Locals were more likely to have aisles (87% compared to 77% of sub-post offices) and those aisles were more likely to be wide enough for wheelchair access (90% compared to 83% of sub-post offices). These figures were slightly different to the 2016 data where 87% of aisles in PO Locals were wide enough, compared to 89% of sub-post offices. This indicates that access has not improved for wheelchair users in sub-post office branches.

In terms of obstacles, 10% of shoppers assessing PO Locals branches with aisles in 2016 stated that there were obstacles (falling to 5% in 2017) and 10% of shoppers reported obstacles in sub-post offices (increasing to 13% in 2017). Therefore, whilst PO Locals have improved, the proportion of aisles with obstacles increased year-on-year in sub-post offices.

Shoppers were also instructed to comment on the availability of facilities for disabled customers.

As the following table indicates the proportion of branches with portable PIN pads and hearing loops remained consistent; however as the availability of these facilities form part of the PO Local model, the numbers are still well below what might be expected.

There has been a decline in the proportion of both branch types with low-level counter positions and low-level scales, with PO Local branches slightly more likely to have these facilities. There was a decline in the proportion of PO Locals with low level writing desks; but there was an increase in the proportion of branches, across both branch types, with hearing loops.

Low-level counter positions, scales and writing desks do not form part of the PO Local model, so are not essential. However, they are desirable features.

TABLE 77 INTERIOR FACILITIES FOR DISABLED CUSTOMERS BY BRANCH TYPE OVERTIME

	2016		2017	
	Sub-post office	Local	Sub-post office	Local
All visits	297	587	305	579
Portable PIN pads	47%	61%	45%	62%
Low level counter position	26%	35%	26%	30%
Low level scales	22%	34%	18%	29%
Low level writing desk or shelf	24%	24%	24%	19%
Hearing loop	18%	27%	22%	32%

In 2016, shoppers reported that 97% of both PO Local and sub-post office branches had dedicated post office counter positions, which fell in 2017 to only 84% of PO Locals and 92% for sub-post offices.

The proportion of shoppers who had to wait or queue fell slightly in PO Locals from 37% in 2016 to 33% in 2017; however a higher proportion of shoppers in sub-post office branches had to wait in 2017 (42% compared to 33% in 2016), which is in-line with the increase in busier branches.

In 2016, the average waiting time in PO Locals was 2.35 minutes, compared to 2.31 in 2017; and the average waiting time in sub-post offices was 2.27 minutes compared to 2.48 in 2017.

In addition, the average transaction time in PO Locals was 5.10 minutes in 2016, compared to 4.56 in 2017; and the average transaction time in sub-post offices was 4.42 minutes compared to 4.23 in 2017.

Therefore, whilst waiting times fell slightly in PO Locals, they increased slightly in sub-post offices, with branches being described as busier overall. Average transactions times also changed, however the scenarios undertaken by shoppers differed.

In 2016, shoppers who had to wait or queue, 93% visiting a sub-post office said the waiting time was acceptable, compared to 90% in 2017; and 91% of shoppers in PO Locals said the waiting time was acceptable in 2016, which was in-line with the 2017 figure.

Therefore, overall, there was little change in queuing and waiting times across the two branch types.

7.1.3 Customer service

When dealing with the staff member a lower proportion of shoppers in 2017 (48%) said that privacy / discretion wasn't required, compared to 2016 (57%). Of those who did say this was important in 2016, 95% of shoppers in PO Locals said their enquiry was dealt with appropriately, compared to 99% of shoppers in sub-post offices. Both figures remained the same compared to 2017.

There was, however, a fall in the number of branches using Perspex screens; from 30% of PO Locals in 2016 to 23% in 2017; and from 28% in sub-post offices in 2016 to 23% in 2017.

In total, 57% of PO Locals did **not** have either Perspex screens or other privacy devices in 2016 increasing to 69% in 2017; and 56% of sub-post offices did not have these facilities in 2016 compared to 70% in 2017. Therefore, there has been a decrease in the proportion of these branch types with these facilities.

Staff were highly rated across the board in terms of giving the shopper their full attention, with little difference year-on-year – 95% for PO Locals in 2016 and 2017, and 95% for sub-post offices in 2017 compared to 97% in 2016.

In addition, shoppers thought that the majority of staff asked sufficient questions – 85% in 2016 and 88% in 2017 for PO Locals; and 88% in 2016 and 86% in 2017 for sub-post offices.

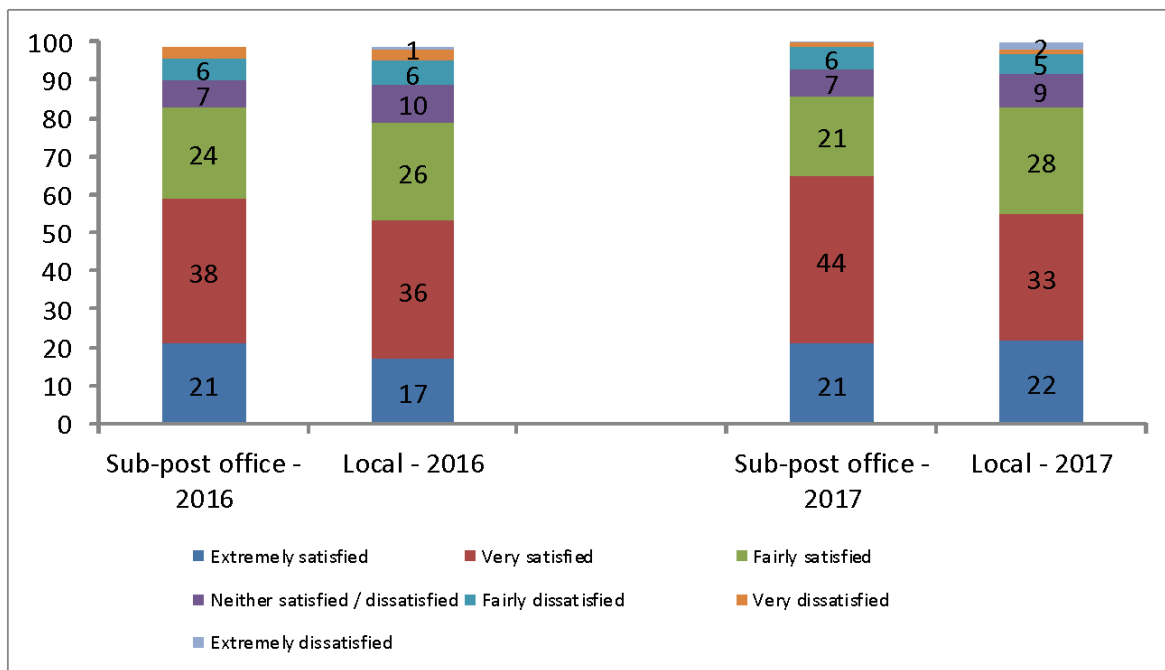
Finally, staff knowledge levels were also rated highly, although lower in PO Locals. In 2016, 83% of shoppers in PO Locals stated that staff were sufficiently knowledgeable compared to 88% in 2017. In sub-post offices the equivalent figures were 92% in 2016 and 93% in 2017.

TABLE 78 STAFF COMPETENCY OVERTIME

	2016		2017	
	Sub-post office	Local	Sub-post office	Local
All visits	297	587	305	579
Staff gave their full attention	97%	95%	95%	95%
Staff asked sufficient questions	88%	85%	86%	88%
Staff had sufficient knowledge	92%	83%	93%	88%

Overall, the proportion of extremely / very satisfied shoppers across both branch types increased; from 59% to 65% in sub-post offices and from 53% to 55% in PO Locals.

CHART 13 SATISFACTION BY BRANCH TYPE OVER TIME



7.1.4 Second class large letter scenario

In 2016, 35 shoppers undertook the second class large letter scenario in sub-post offices, with 74 shoppers undertaking the scenario in PO Locals. In 2017, the assessment numbers were 59 and 146 respectively.

In 2016 this scenario involved a mixture of enquiries and purchases, whereas all scenarios in 2017 involved purchases only.

There was some variation in what staff asked about the letter, with PO Local staff generally improving on 2016 and more likely to ask these questions than staff in sub-post offices:

TABLE 79 STAFF QUESTIONING OVERTIME – SECOND CLASS LARGE LETTER

	2016		2017	
	Sub-post office	Local	Sub-post office	Local
All second class large letter visits	35	74	59	146
Ask about the discuss the letter contents	29%	20%	22%	32%
Asked if letter contained dangerous, prohibited or restricted items	17%	9%	8%	10%
Asked about the value of the contents	20%	15%	7%	18%
Asked if you wanted a letter to be signed for on delivery	29%	22%	24%	29%

In 2016, 38 of the 109 shoppers (35%) across PO Locals (32%) and sub-post offices (36%) were recommended the correct option only initially. A further 53 shoppers (49%) were recommended the correct option only when they restated their needs (50% PO Local and 46% sub-post offices). 18 shoppers (17%) were not recommended the correct option. Overall 86% of shoppers sent the letter using the correct stamp.

The questionnaire was slightly different in 2017, however 87 of the 205 shoppers (42%) across PO Locals (41%) and sub-post offices (46%) were recommended the correct option only initially and, after re-stating their needs a further 70 (34%) – 34% PO Locals / 36% sub-post offices - were offered the correct option only. In addition, 33 (16%) were offered the correct option as a range of options (18% PO Locals / 12% sub-post offices) after re-stating their needs. Overall, 15 shoppers (7%) were not offered the correct option and, therefore, did not use the service.

7.1.5 Special Delivery scenario

In 2016, 72 shoppers undertook the Special Delivery scenario in sub-post offices, with 150 shoppers undertaking the scenario in PO Locals. In 2017, the assessment numbers were 57 and 145 respectively.

In 2016, 93% of shoppers at PO Locals were recommended Special Delivery (55% spontaneously and 37% after questioning); compared to 97% in sub-post offices (61% spontaneously and 36% after questioning).

Whilst comparisons can be made to 2017, the questionnaire changed slightly and, therefore, whilst the proportion of staff recommending Special Delivery did increase, as below, this was based on slightly different question wording.

Overall in 2017, 98% of shoppers in sub-post offices were offered the Special Delivery option (including 2% spontaneously and 96% after questioning), compared to 88% in PO Locals (including 9% spontaneously and 79% after questioning).

There were improvements in the level of staff questioning in relation to the shopper enquiry, as follows:

TABLE 80 STAFF QUESTIONING OVER TIME – SPECIAL DELIVERY

	2016		2017	
	Sub-post office	Local	Sub-post office	Local
All Special Delivery visits	72	150	49	145
Asked about the contents of the letter	50%	47%	67%	69%
Asked about the value of the contents	60%	55%	74%	71%

7.1.6 Royal Mail Signed For second class letter

In 2016, 76 shoppers undertook the Royal Mail Signed For second class letter scenario in sub-post offices, with 139 shoppers undertaking the scenario in PO Locals. In 2017, the assessment numbers were 134 and 144 respectively.

In 2016, following the initial enquiry, 24% of shoppers at sub-post offices and 14% of shoppers assessing a PO local were spontaneously advised to use a specific service, with a range of options being suggested.

Shoppers then assessed what questions they were asked by staff, with small differences across the two branch types.

Generally, there was an increase in the proportion of staff asking questions about whether a signature was required, time sensitivity and letter contents across both branch types. However, there were variations elsewhere.

TABLE 81 STAFF QUESTIONING OVERTIME – ROYAL MAIL SIGNED FOR SECOND CLASS LETTER

	2016		2017	
	Sub-post office	Local	Sub-post office	Local
All Royal Mail Signed For second class letter visits	76	139	134	144
Asked if you wanted a signature	68%	68%	77%	75%

Asked about the time sensitivity of the letter	47%	50%	56%	60%
Asked about and discussed the contents of the letter	36%	25%	37%	33%
Asked if the contents contained anything dangerous or prohibited	14%	9%	8%	9%
Asked about the value of the letter	34%	27%	31%	27%
Asked if you needed to track the item	24%	16%	16%	23%

In 2016, 26% of the 215 shoppers (28% in PO Locals and 22% in sub-post offices) were recommended the correct option only initially; increasing to 81% of shoppers overall who were recommended the correct product only after prompting (84% in PO Locals and 76% in sub-post offices). As such, 19% of shoppers were not recommended the correct product at all (16% in PO Locals and 24% in sub-post offices).

The questionnaire was slightly different in 2017, however 100 of the 278 shoppers (36%) across PO Locals (34%) and sub-post offices (38%) were recommended the correct option only initially, in addition to 43 shoppers (15%) who re-stated their need having been offered the correct service as part of a range of options initially (17% PO Locals / 13% sub-post offices); plus 83 shoppers (30%) who re-stated their needs for a second time (30% PO Locals / 30% sub-post offices). Overall, 52 shoppers (19%) were not offered the correct option and, therefore, did not use the service.

7.1.7 Royal Mail Signed For small parcel

In 2016, 74 shoppers undertook the Royal Mail Signed For small parcel scenario in sub-post offices, with 149 shoppers undertaking the scenario in PO Locals. In 2017, the assessment numbers were 55 and 143 respectively.

In 2016, 3 shoppers were told they could not post their parcel from the post office (1%), compared to only 1 shopper (in a PO Local) in 2017.

Shoppers assessed a number of factors relating to the discussion with the staff member, with variations year-on-year. Whilst there was a decline in the proportion of staff asking about the parcel weight in PO Locals, there was an increase in the proportion of staff measuring the parcel dimensions.

TABLE 82 STAFF QUESTIONING OVER TIME – ROYAL MAIL SIGNED FOR SMALL PARCEL

	2016		2017	
	Sub-post office	Local	Sub-post office	Local
All Royal Mail Signed For small parcel visits	74	149	55	143
Staff member asked about or discussed parcel weight	45%	40%	44%	34%
Staff member weighed the parcel	97%	99%	100%	98%
Staff member measured the parcel dimensions	13%	18%	31%	29%

In addition, there were differences in terms of the questions relating to the contents of the parcel. There was an increase overall in the proportion of staff asking about how the items were packaged and the value of the contents; however there was some variation on factors relating to contents and dangerous / prohibited items.

TABLE 83 STAFF QUESTIONING OVER TIME – ROYAL MAIL SIGNED FOR SMALL PARCEL

	2016	2017

	Sub-post office	Local	Sub-post office	Local
All Royal Mail Signed For small parcel visits	74	149	55	143
Staff member discussed the contents of the parcel	85%	79%	78%	78%
Staff member asked if the contents included dangerous or prohibited items	54%	47%	47%	50%
Staff member asked about or discussed the value of the contents	64%	48%	67%	54%
Staff member asked about or discussed how the items should be packaged	22%	17%	38%	26%

In 2016, 70% of shoppers assessing a PO Local and 76% of those assessing a sub-post office were asked if they wanted a signature, increasing to 79% for PO Locals in 2017; and remaining the same in sub-post offices.

In 2016, 51 of the 223 shoppers (23%) across PO Locals (25%) and sub-post offices (19%) were recommended the correct option only initially; and a further 149 shoppers (67%) were recommended the correct option only when they restated their needs (63% PO Local and 74% sub-post office), meaning that 23 shoppers (10%) did not have the correct option recommended.

The questionnaire was slightly different in 2017, however 97 of the 198 shoppers (49%) across PO Locals (50%) and sub-post offices (45%) were recommended the correct option only initially, in addition to 25 shoppers (13%) who re-stated their need having been offered the correct service as part of a range of options initially (12% PO Locals / 15% sub-post offices); plus 44 shoppers (22%) offered the correct option only who re-stated their needs for a second time (23% PO Locals / 20% sub-post offices). Overall, 32 shoppers (16%) were not offered the correct option and, therefore, did not use the service.

7.1.8 Cash withdrawal

In 2016, 74 shoppers undertook the cash withdrawal enquiry in sub-post offices, with 147 shoppers undertaking the scenario in PO Locals. In 2017, the assessment numbers were 191 and 289 respectively.

In 2016, 96% of shoppers were able to successfully withdraw cash (not via cash-back) across both branch types; compared to 97% in sub-post offices and 94% in PO Locals in 2017.

In 480 assessments conducted in 2017, 458 shoppers (95%) were able to successfully withdraw cash (not via cash-back), with 97% able to do so in sub-post office branches compared to 94% in PO Locals.

In 2016, 42% of shoppers were told there was a cash limit, increasing to 44% in 2017. Of those, a very similar number were told that the limit was dependent on the bank (66% in 2016 compared to 65% in 2017) and a slightly higher number in 2017 was told that the limit was £300 (16% compared to 13% in 2016).

7.1.9 Business deposit enquiry

As in 2016, the Business Deposit enquiry was only undertaken by shoppers assessing PO Locals. In 2016, there were 88 assessments compared to 185 in 2017.

In terms of questioning, a higher proportion of staff in 2017 asked which bank the business used (increasing from 58% to 69%) and how much cash the shopper wanted to deposit (increasing from 47% to 53%). The proportion asking about frequency of deposits remained the same (at 35%).

Overall in 2016, 83% of shoppers were told they could make a deposit at the branch they visited, compared to 83% in 2017 (54% spontaneously and 29% following the shopper prompt). Of those were told deposits were possible in 2016, 45% were told that deposits of up to £3,000 could be made, compared to only 35% in 2017.

7.1.10 Local Collect and Amazon collection service

In 2017, 90% of shoppers assessing a sub-post office were told their Local Collect parcel could be delivered to

the branch, compared to 81% assessing a PO Local. This shows a decline from 2016, where the proportions were 94% and 87% respectively.

In terms of the Amazon Collect service, 85% of shoppers assessing a sub-post offices were told the parcel could be collected from the branch they visited, compared to 82% assessing a PO Local. Again, this showed a decline from 2016, where the proportions were 90% and 89% respectively.

7.1.11 Parcel weight enquiry

In 2017, 57% of shoppers assessing a sub-post office were told there was a weight limit, compared to 46% of shoppers assessing a PO Local. Of those, a large spread of different weight limits were given. These figures were higher than 2016, where 47% of those assessing a sub-post office and 44% assessing a PO Local were told there was a weight limit.

7.1.12 Summary

Overall, whilst there were some differences noticed between the 2016 and 2017 performance, no significant improvements in service were noted.

Therefore, customers visiting a PO Local and sub-post office branch in 2017 are likely to receive the same level of service, have access to the same facilities and have their enquiry dealt with in largely the same way. This means that there are still gaps in the knowledge of staff dealing with such enquiries and, therefore, improvements can be made.

8 Summary and Conclusions

Throughout the report brief summaries have been included at the end of each section, which have been combined in the Executive Summary on page 6.

The following conclusions are aimed at bring together the summaries in order to focus on the key results, including positive and negative findings.

1.12.1 Headlines

Overall, the results reveal an inconsistent pattern across the post office network:

- Across many scenarios (in terms of access into the branch, access within the branch and quality of service) PO Local and newly franchised Crown branches performed in line with or better than their equivalent branch types – e.g. sub-post offices and Crowns
- However, despite the good performance of PO Locals compared to sub-post offices, there were still a large number of cases in which disabled facilities that form part of the model appeared to be unavailable, not visible or not clearly signposted. Disabled facilities were also unavailable in a high proportion of PO Mains and other large High Street branches
- In many mail scenarios, consistently across all branch types, the correct service was not offered initially as the only option due to lack of questioning of shopper needs. As, in the majority of cases, the correct recommendation was only reached following shopper prompts
- Although the non-mail scenarios were generally well handled across all branch types, in a significant minority of cases shoppers were informed that the service was unavailable. This was particularly the case at PO Locals, but also at the larger high street branches

1.12.2 The main positives.

There were a number of positive to report:

Accessibility:

- In the majority of assessments (70%) nearby parking (within 100 yards) appeared to be available, increasing to 4 in 5 visits at PO Locals (81%), PO Mains (81%) and sub-post offices (79%)
- In the majority of assessments (87%), branches appeared to have at least one entrance wide enough for a wheelchair that was flat, ramped or had other measures in place to aid access. This increased to 99% of newly franchised Crowns, closely followed by the other large high street branches
- Disabled facilities were available, visible or clearly signposted in a higher number of visits to newly franchised Crowns and WHSmiths branches compared to Crowns, as follows:
 - Newly franchised Crowns – low level counters (79%), writing desks (75%), hearing loops (67%)
 - WHSmith branches - low level counters (70%) and portal PIN pads (72%)
 - Crown branches – low level counters (54%), scales (47%), writing desks (63%), hearing loops (46%) and portable PIN pads (67%)
- Generally, disabled facilities were more likely to be available, visible or clearly signposted in PO Locals than sub-post offices. For example hearing loops were seen in 32% of PO Locals compared to 22% in sub-post offices; and PIN pads were noted in 62% of PO Locals compared to 45% of sub-post offices

Waiting / queuing:

- Shoppers were most likely to be served without having to wait or queue in PO Locals, with over 2 in 3 (68%) served immediately, compared to just under 3 in 5 at sub-post offices (58%) and just over half in PO Main (52%) and privately managed (51%) branch visits. Where shoppers did have to wait or queue before being served at sub-post offices, PO Locals and PO Mains, on average they had to queue for less than 3 minutes

Quality of service:

- Across many scenarios, PO Locals and newly franchised Crowns performed in line or better than their equivalent branch types – e.g. sub-post offices and Crowns, as follows:
- Second class large letter – correct service only offered initially or after prompting in 75% of PO Local and 72% of newly franchised Crown assessments, compared to 82% in sub-post office and 58% of Crown assessments
- Special Delivery – shoppers in newly franchised Crowns were more likely than those assessing Crown branches to be asked appropriate questions on contents, value and urgency of item. The PO Local figures were in line with the sub-post office results
- International parcel – despite forming the hardest scenario conducted at the high street branches, the majority of shoppers at Crown and newly franchised Crown branches were correctly asked whether a signature was required (92% and 82% respectively) or about the contents (97% and 87% respectively), although they were less likely to be asked other questions – e.g. whether the parcel contained dangerous / prohibited items (41% and 42% respectively)
- There was good availability and provision of non-mail services:
 - On average nearly 4 in 5 (78%) shoppers were able to deposit cash
 - In over 9 in 10 cases visits to sub-post offices (97%) and PO Locals (94%) shoppers could withdraw cash
 - In over 4 in 5 (83%) cases the business cash deposit service was available at PO Locals
 - The Passport Check and Send service was available in all Crown and newly franchised Crown branches and in approximately 9 in 10 WHSmith (94%) and privately managed (90%) branches
 - On average over 4 in 5 shoppers overall were informed that Local Collect (84%) and Amazon (87%) shopping collection services were available

1.12.3 The main negatives.

There were a number of negatives to report:

Accessibility:

- As above, despite nearby parking being available in the majority of assessments, there was lower availability at certain branch types including WHSmith (38%), newly franchised Crowns (45%) and Crowns (48%)
- Although the majority of branches had have at least one entrance wide enough for a wheelchair that was flat, ramped or had other measures in place to aid access, nearly 3 in 10 (29%) sub-post offices and just over 1 in 7 (14%) PO Local branches did not
- There was a perceived lack of disabled facilities at privately managed branches and PO Mains. In terms of the latter, the following facilities should form part of the model and, therefore, the proportions may be lower than expected – low level counter positions (46%), low level scales (46%), low level writing desks (57%), hearing loops (61%), portal PIN pads (64%)
- Although PO Locals generally performed better than sub-post offices in the provision of disabled facilities, there were still no hearing loops in over 2 in 3 (68%) cases and no portable PIN pads in nearly 2 in 5 (38%) visits, despite these facilities being part of the model

Waiting / queuing:

- In the majority of assessments conducted at high street branches, aside from PO Mains and privately managed branches, shoppers had to wait / queue before being served; including 4 in 5 (80%) visits to WHSmith branches, over 3 in 4 (77%) visits to newly franchised Crowns and 3 in 5 (62%) visits to Crown branches. Where shoppers did have to wait or queue before being served at Crowns and WHSmiths, on average they had to queue for over 4 minutes
- On average, Crowns (4.5), WHSmith (4.1) and newly franchised Crowns (3.6) had the most counter

positions. However, on average more than half of the counter positions at these branches were closed; 2.4 at Crowns, 2.1 WHSmiths and 1.8 at newly franchised Crowns

Quality of service:

- Across many mail scenarios at all branch types, the correct service was not offered as the only option initially due to a lack of questioning to determine shopper needs, as follows:
 - Second class large letter – overall 38% were asked about the letter contents and 22% were asked about the value. The correct service was offered initially as the only option in 2 in 5 (40%) visits, only increasing to 3 in 4 (73%) after the shopper re-stated their needs
 - Signed For second class letter – across all sub-post office and PO Local assessments, only 35% were asked about the letter contents, 29% were asked about the value and 76% were asked if a signature was required. The correct service was offered initially as the only option in 2 in 5 (38%) sub-post office assessments and 1 in 3 (34%) PO Local assessments. This only increased to over 3 in 5 visits (62% sub-post offices and 63% PO Locals) after the shopper asked for a recommendation and re-stated their needs
- In some scenarios Crowns under-performed the other high street branches:
 - Second class large letter – least likely to offer the correct service as the only option, either initially and after prompting (58%). This compares to 74%, 72% and 70% of privately managed, newly franchised Crown and WHSmith branches respectively
 - Special Delivery – most likely to offer the correct service spontaneously (24%) without asking any of the correct questions. This compares to the overall average of 12% of shoppers offered the service spontaneously
- Although the majority of staff in high street branches did ask appropriate questions in relation to the international parcel enquiry before determining needs and offering a service, over 1 in 4 (26%) offered a service spontaneously without determining shoppers' needs
- Although the provision of information in relation to non-mail enquiries was generally good, there were assessments where the service did not appear to be available when it should have been:
 - In a very small minority (6%) of cases at PO Local branches shoppers could not withdraw cash
 - In a significant minority of assessments, shoppers could not deposit cash (22%), including 33% in privately managed branches
 - In nearly 1 in 5 (17%) PO Local assessments the business cash deposit service was unavailable
 - 1 in 10 (10%) visits to privately managed branches and in 6% of WHSmith assessments, shoppers were informed that the Passport Check and Send service was unavailable
 - 1 in 5 shoppers at privately managed branches (21%) and PO Locals (19%) were informed the Local Collect service was unavailable
 - Nearly 1 in 5 shoppers at PO Locals (18%), WHSmith, newly franchised Crowns and privately managed branches (17% each respectively) were informed that the Amazon shopping collection services was unavailable; and in just under 1 in 7 (15%) sub-post office assessments