

Postmaster Sentiment Survey

May 2024



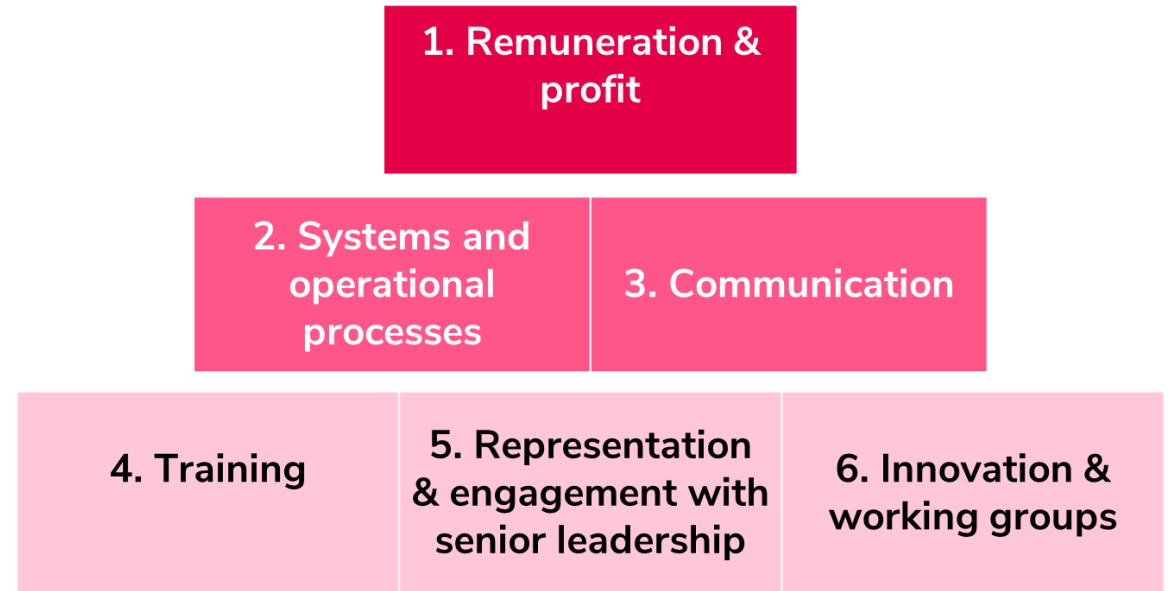
Postmaster Sentiment Tracker

The Postmaster survey was carried out online and administered by our research agency, Quadrangle

The survey was live for Postmasters to complete between 8th March and 2nd April 2024

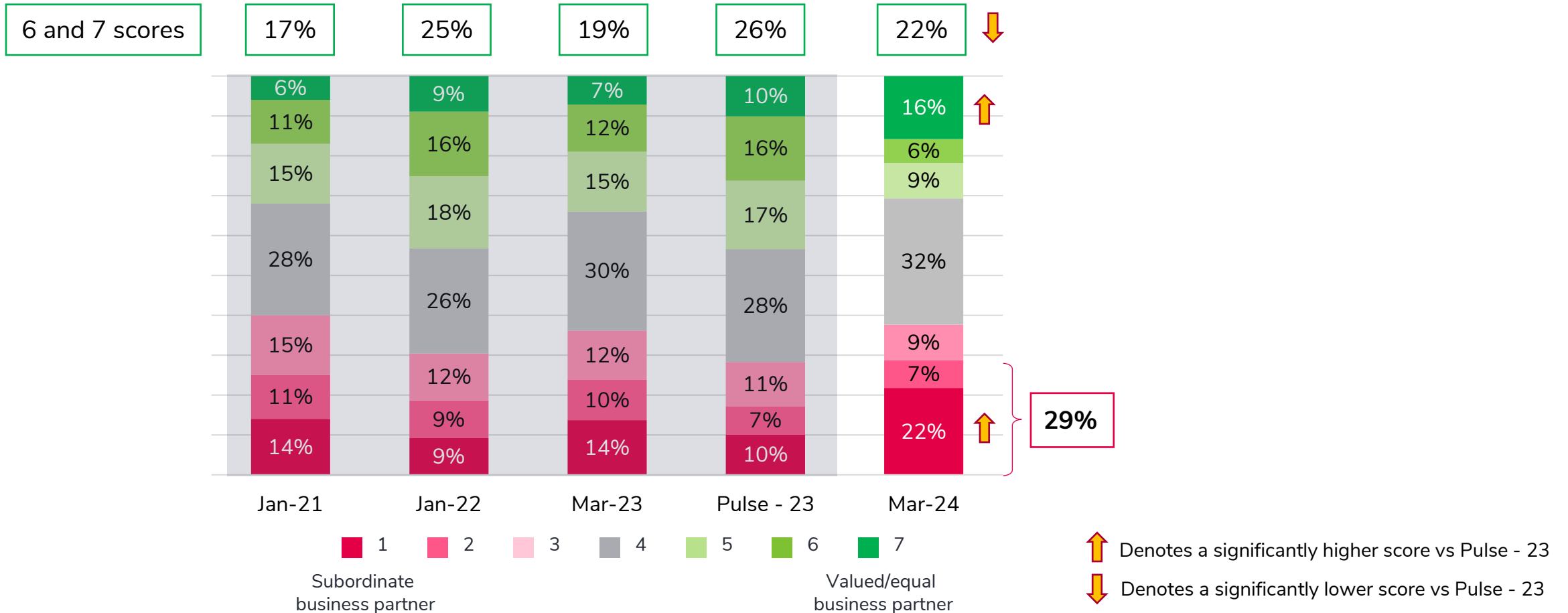
1,917 responses were completed by Postmasters – the highest number since the survey started in 2021

Postmasters core priority areas remain relevant today, as they did from 2021



Overall, Postmasters are more likely to believe that their relationship with Post Office has declined, but views have polarised, with the proportion giving the top rating increasing.

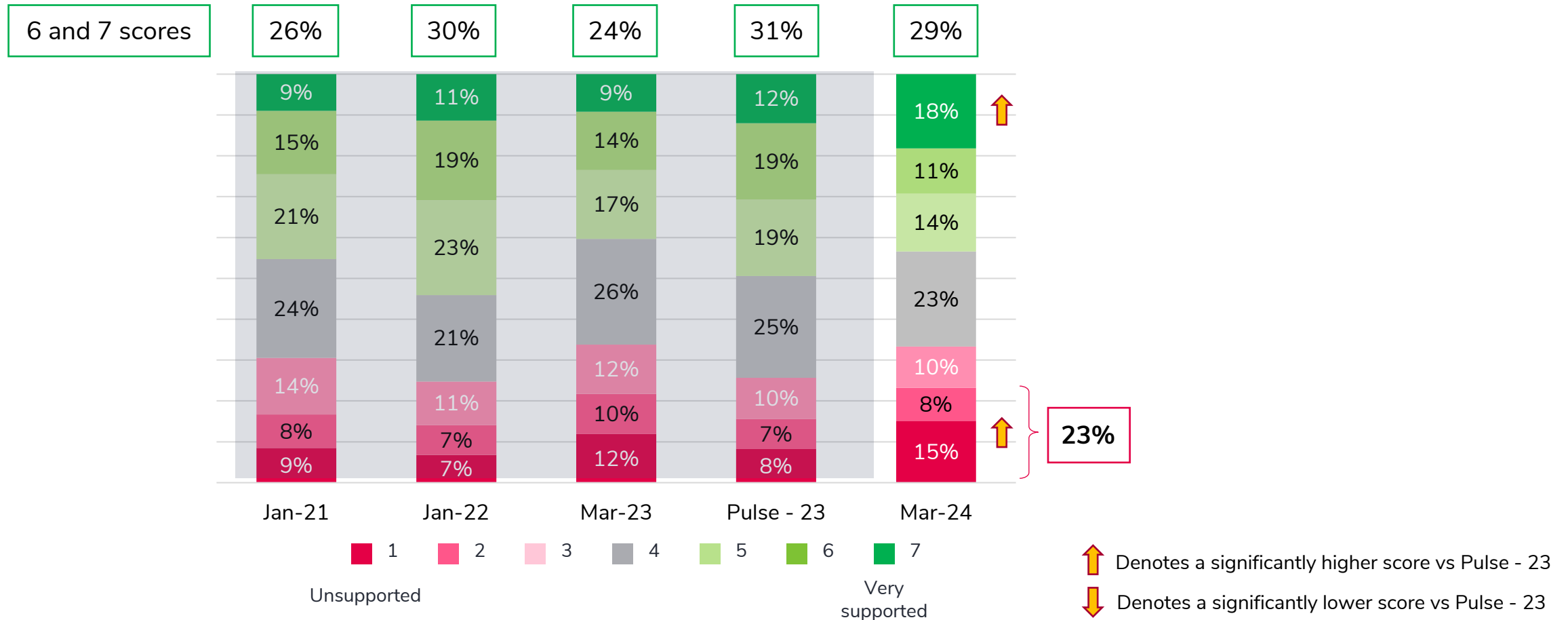
How would you describe the relationship you have with Post Office?



B1 How would you describe the relationship you have with Post Office?
 Base wave 1: 1,767, wave 2: 1,313, wave 3: 1,642, wave 4: 1,751 wave 5: 1,917

There has been a similar polarisation of views when it comes to feeling supported. A higher proportion feel both very supported and very unsupported.

How supported, or not, do you feel by Post Office?

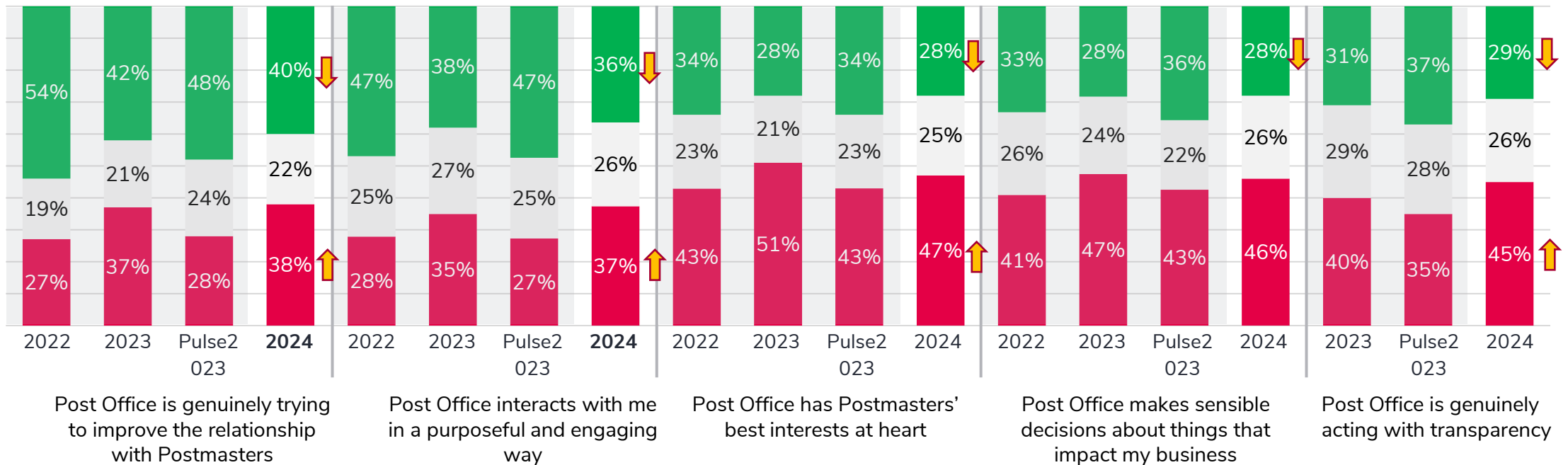


B7. How supported, or not, do you feel by Post Office?
Base wave 1: 1,767, wave 2: 1,313, wave 3: 1,642, wave 4: 1,751, wave 5: 1,917

Trust has declined across all statements compared with the Pulse 2023 results – largely returning to the same levels as in March 2023.

Trust statements

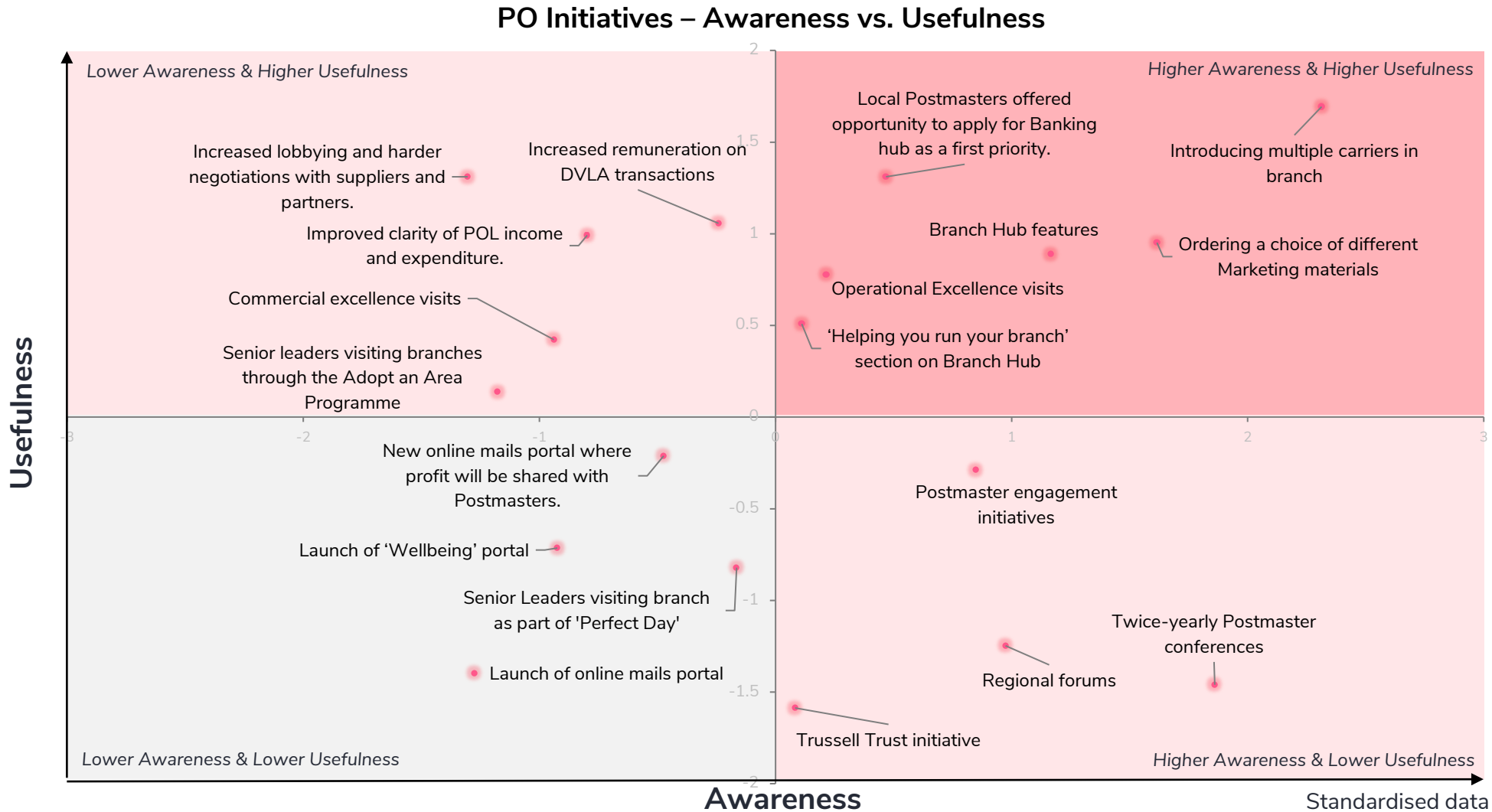
Top 3 score and bottom 3 score nets shown



■ Disagree ■ Neutral ■ Agree

↑ Denotes a significantly higher score vs Pulse 2023
 ↓ Denotes a significantly lower score vs Pulse 2023

Initiatives which have a direct impact on branches have the highest awareness and are perceived most useful.



Question: B10A Which of the following are you aware of in the last year? Base, wave 5: 1,917. B10b_SUM. And how useful did you find each of them? Bases vary

* Usefulness = top 2 score on a 7-point scale

Support remains well received, communications are an area of potential improvement. Importantly, many Postmasters still don't feel heard, and the level of remuneration is most poorly rated.

Branch Hub tools to help run my branch on a day-to-day basis (such as stock ordering)

Service received from the Cash Management Helpdesk

Access to training materials and support

Service received from the Branch Support Centre

Service received from the IT helpdesk

Communications from PO are simple and easy to understand

Communications are received in a timely manner

Creating new products and services

Simplicity of our products and services

The Horizon user experience

Simplicity of PO systems and processes

Ability to communicate directly with senior leadership

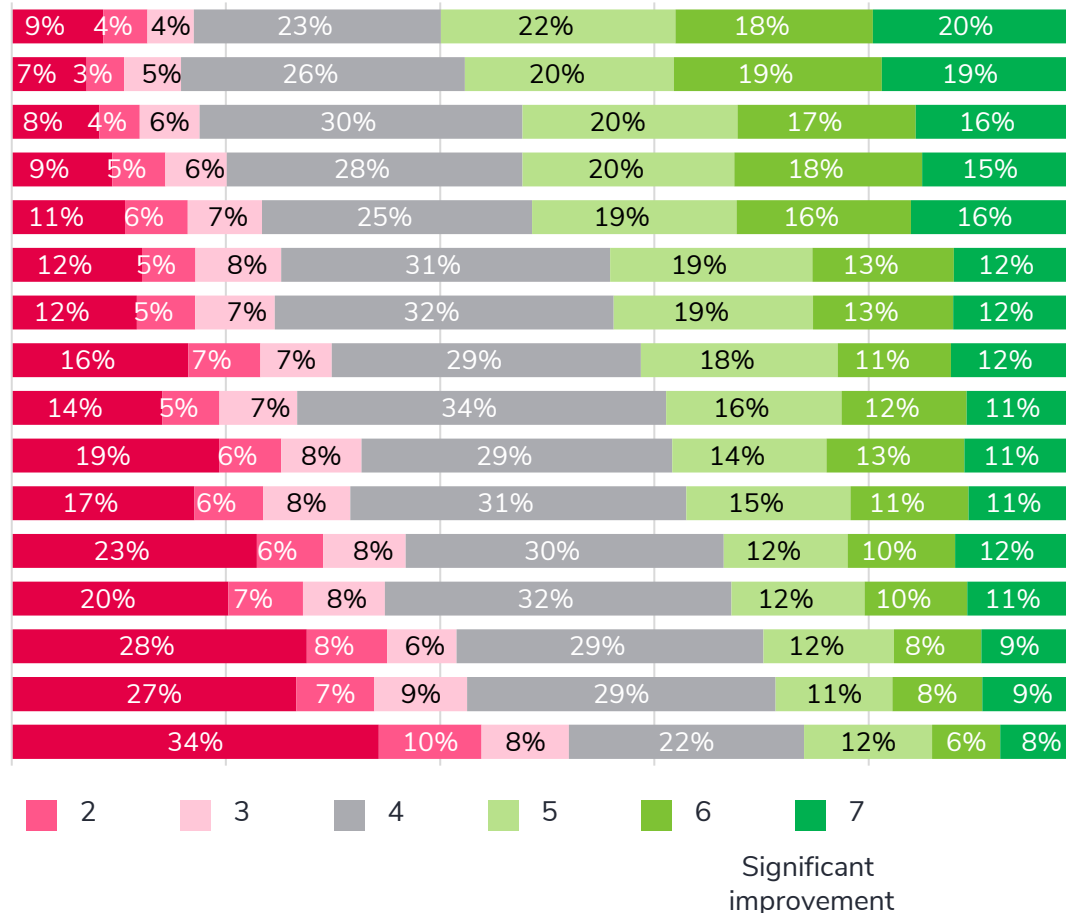
Communications from PO are open and honest

A focus from senior leaders in PO on improving the overall profitability of my branch

The views of Postmasters are listened to and acted on by Senior Leadership

The level of remuneration you receive

Improvements in priorities

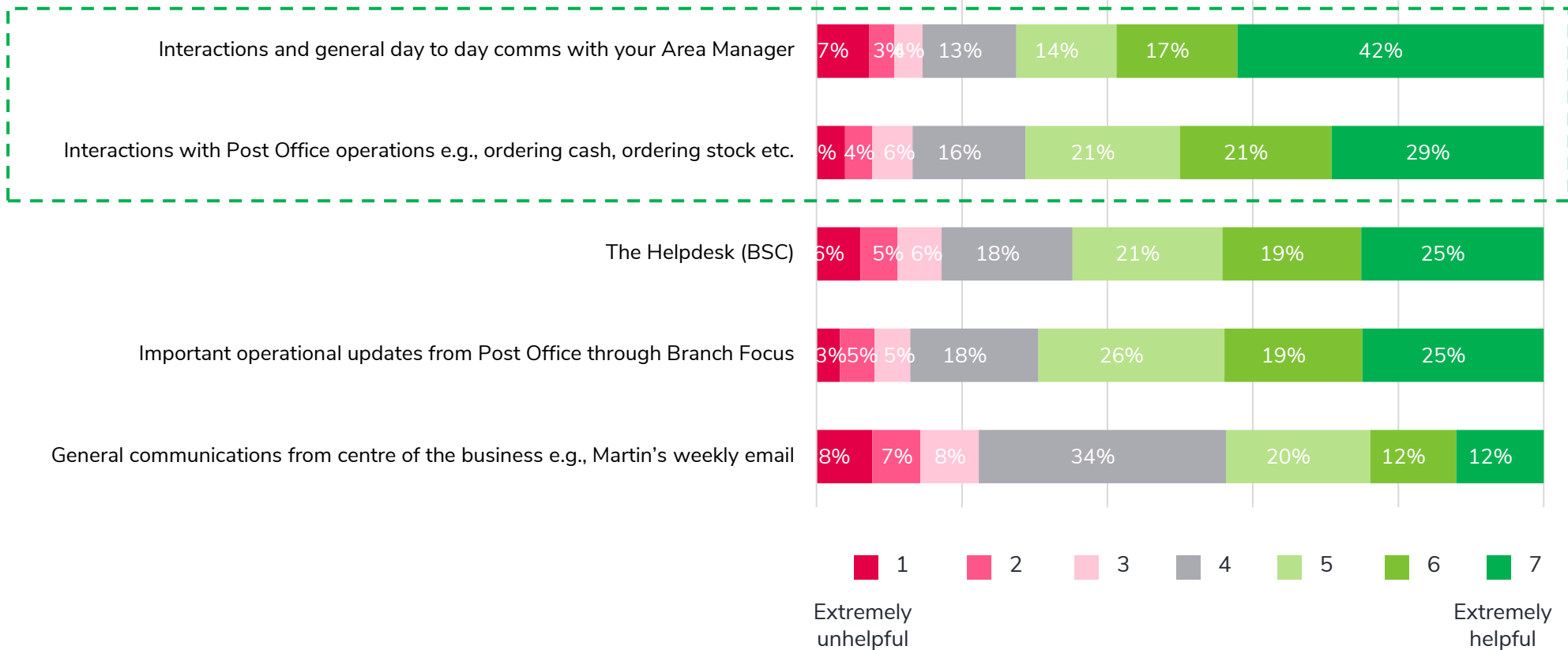


E2a Thinking about the priorities highlighted in the last research, to what extent have there been improvements in each of the areas listed in the last 12 months?

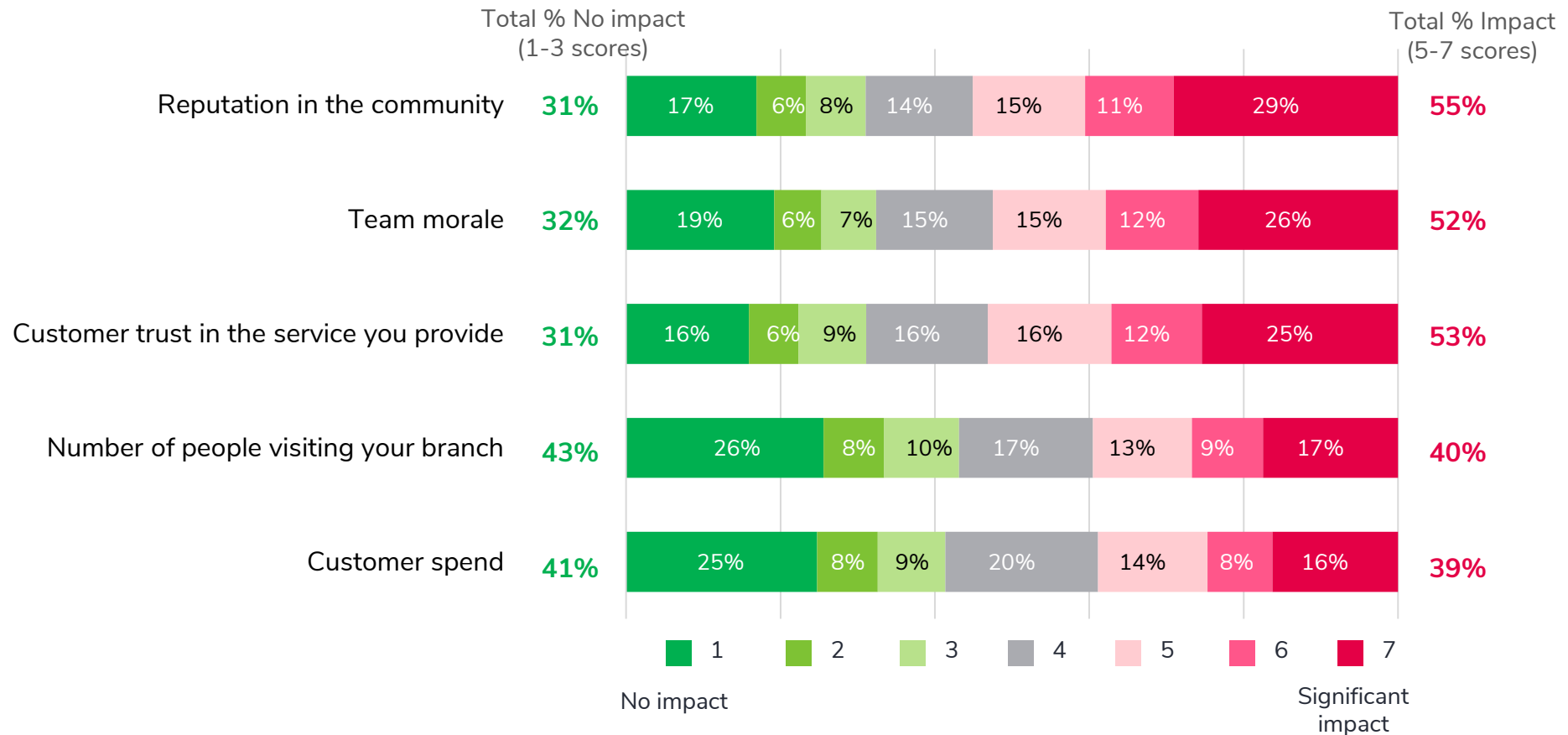
Base wave 4: 1,751, wave 5: 1,917

↑ Denotes a significantly higher score vs Mar '23
 ↓ Denotes a significantly lower score vs Mar '23

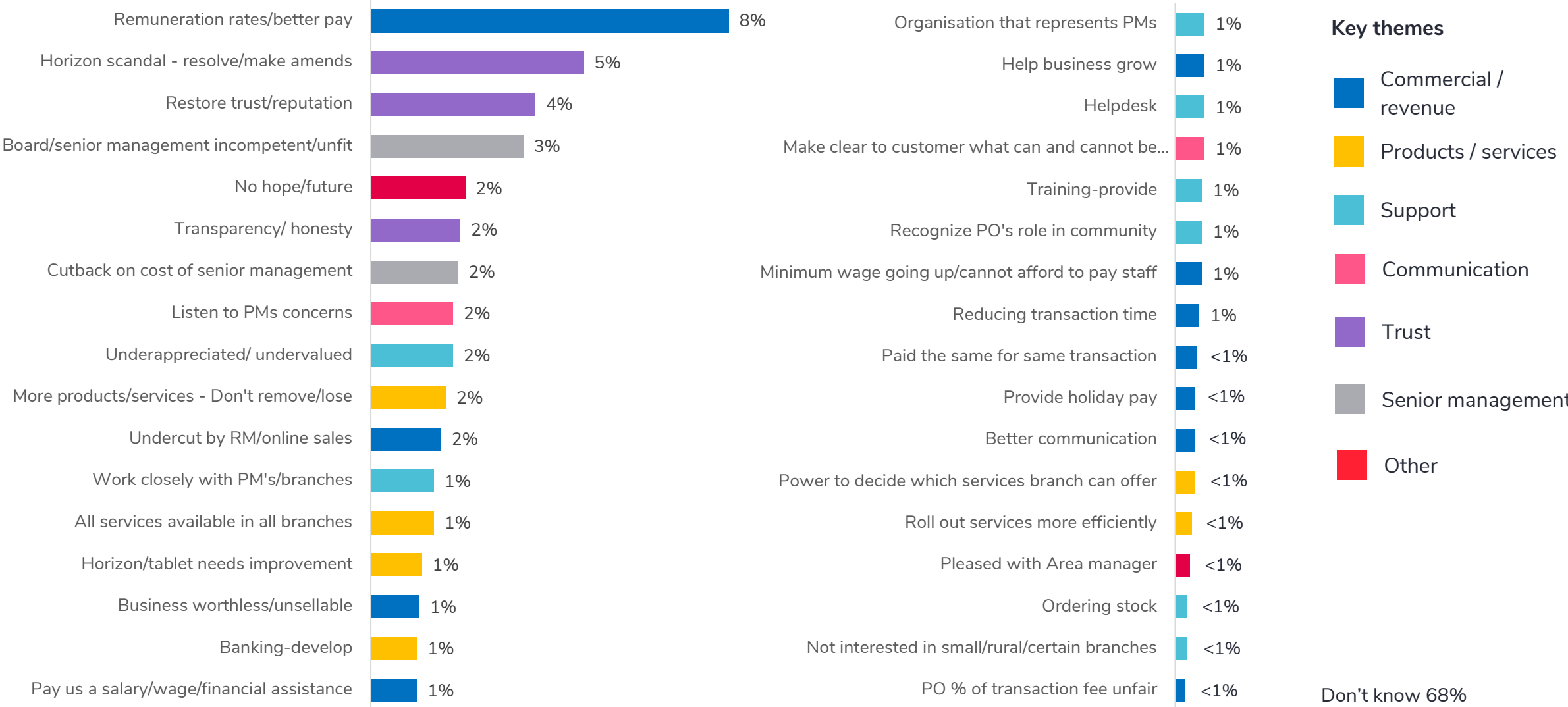
The most helpful interactions with Post Office are those which directly impact the day-to-day running of Postmasters' businesses.



Half of Postmasters believe that the media coverage in 2024 has had a negative impact on their reputation and staff. While the commercial impact is less significant, still around 4-in-10 say customer spend has been impacted.



From the verbatim comments, postmasters have a wide range of requests, including those associated with their revenue, products and services, and rebuilding trust



15. Is there anything else you would like to tell Post Office that has not been covered?
Base: wave 5: 1,917

Summary

- Postmaster views of Post Office have polarised somewhat in 2024. Overall, Postmasters are more likely to believe that their relationship with Post office has declined, but the proportion giving the top rating has increased.
- Similarly, the proportion of Postmasters feeling supported has decreased, but again, the proportion giving the top rating has increased.
- Levels of Trust have declined since the Pulse survey (Oct/Nov 2023), returning to similar levels to those recorded in March 2023.
- Remuneration (alongside the available range of Post Office products and services) remains the top priority for Postmasters – it is spontaneously mentioned as the main desired improvement, and it is the poorest performing of the top priority areas in terms of perceived improvement. In general, Postmasters are most interested in things which are going to have a direct impact on the day-to-day running of their branch(es) and help drive income.
- Awareness of some key initiatives is high, as is their perceived usefulness, particularly the introduction of multiple carriers in branch, the ability to order a range of marketing materials via Branch Hub, and Branch Hub features being available on Horizon. As in previous waves, there is evidence that the more initiatives Postmasters are aware of, the more positively they feel about Post Office.
- Around half of Postmasters say that 2024 media coverage has had a negative impact on staff morale, and trust and reputation in their community. While an impact on footfall and sales is less evident, still around four-in-ten postmasters say they have been impacted.
- Although the results have moved backwards, this is understandable given the significant publicity surrounding the organisation in recent months, and there is a platform to build greater positive sentiment in the coming year.

