

Postmaster research 2022 High level results

February 2022

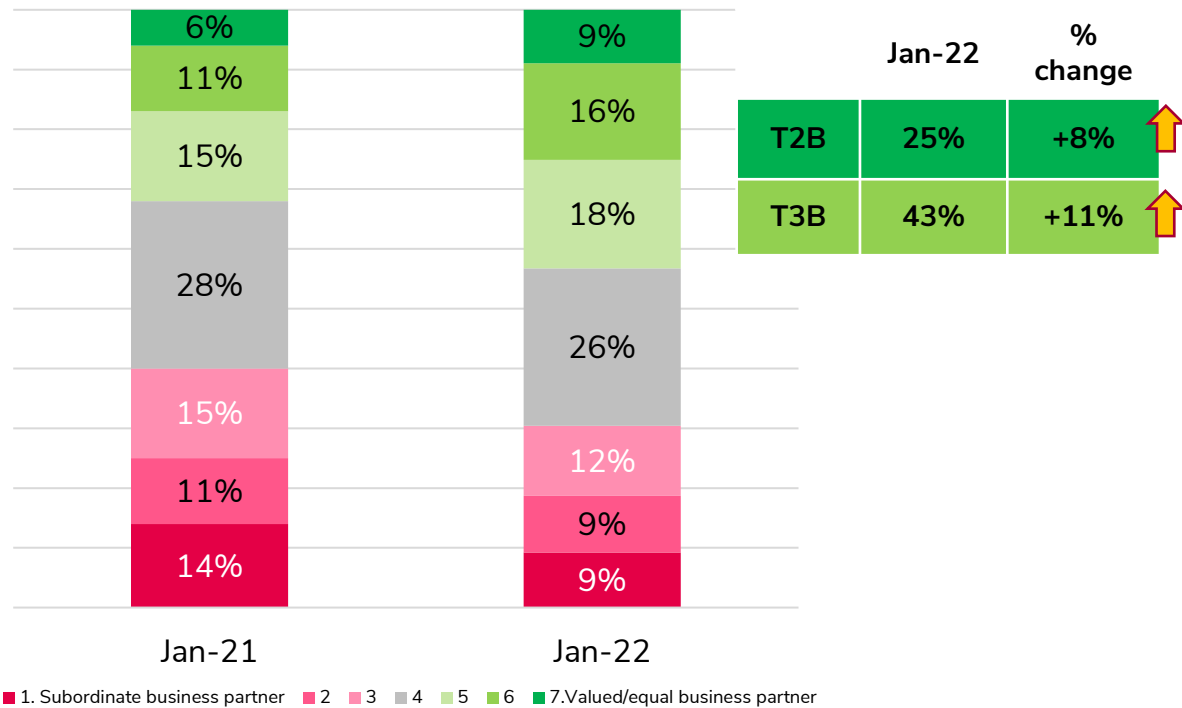


In summary

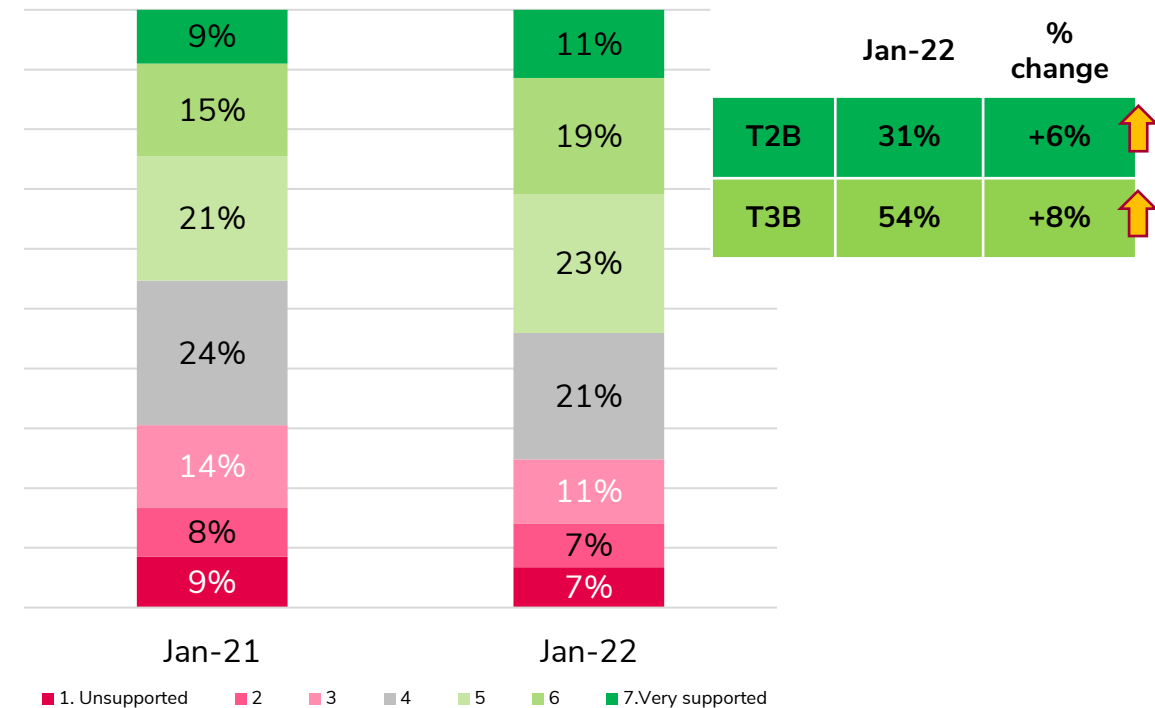
- There has been a **significant improvement** in Postmaster sentiment vs. Jan–21. Key KPIs are up wave on wave and most Postmasters agree Post Office is *trying to improve the relationship*.
- Improvements are driven by:
 - High levels of **awareness of Post Office initiatives** in 2021 (and a belief in the usefulness of initiatives)
 - Improved satisfaction with **operational processes/ support** e.g. Branch Support Centre, Cash Ordering, Stock Ordering, Cash Helpdesk
 - Improvements to **Branch Hub**
 - Improvements to **Training**
- And at the same time, **Area Managers continue to be praised**, contributing to better overall scores in the round.
- However, **remuneration / profitability remains the key, dominant concern**. Most continue to feel remuneration is not appropriate for the products / services delivered and over half claim they have seen no improvement in the last 12 months.
- The data suggests real progress has been made but there is some **evidence of scepticism/ mistrust**; just one in three think Post Office has Postmasters *best interests at heart*.
- It *might* be connected to the sense Post Office has not (yet) addressed their main concern, although progress has been made in other important areas.
- One thing is clear, this data serves as a reminder that action is need on multiple fronts. **Improvements have been made in Postmaster /Post Office working relationships, but Postmasters continue to feel their efforts are insufficiently rewarded. As long as remuneration remains a dominant concern, we think it will be challenging to further improve the relationship.**

Significantly more Postmasters feel they are supported and treated as an equal business partner

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



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

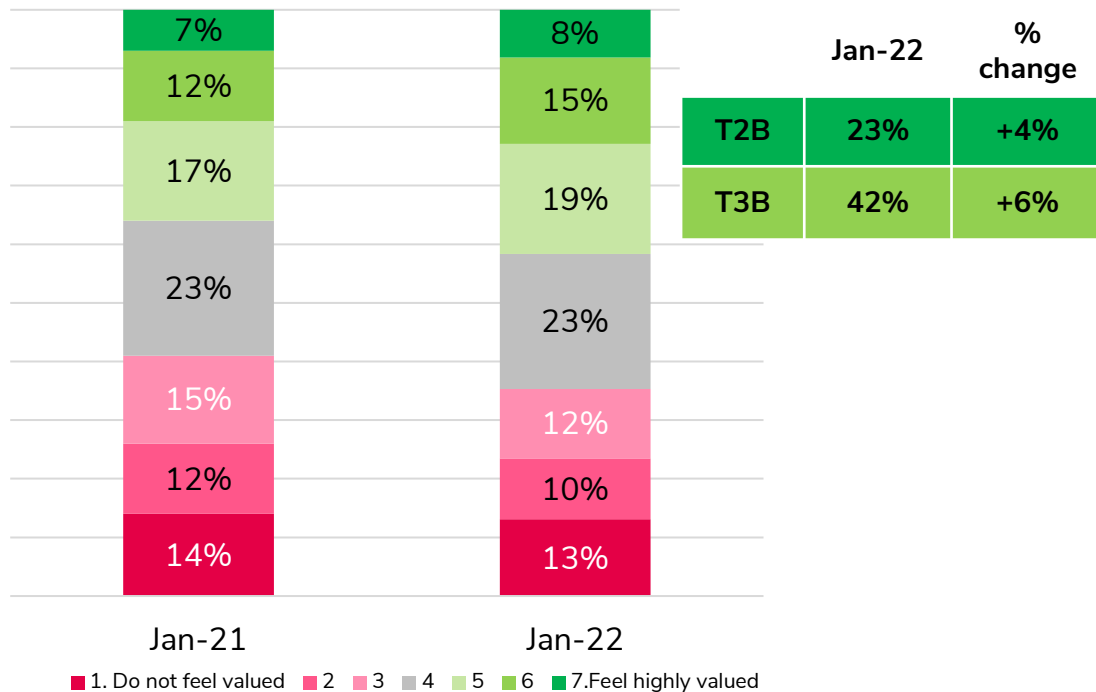


B1 How would you describe the relationship you have with Post Office?
 B7. How supported, or not, do you feel by Post Office?
 Base wave 1 1,767, wave 2 1313

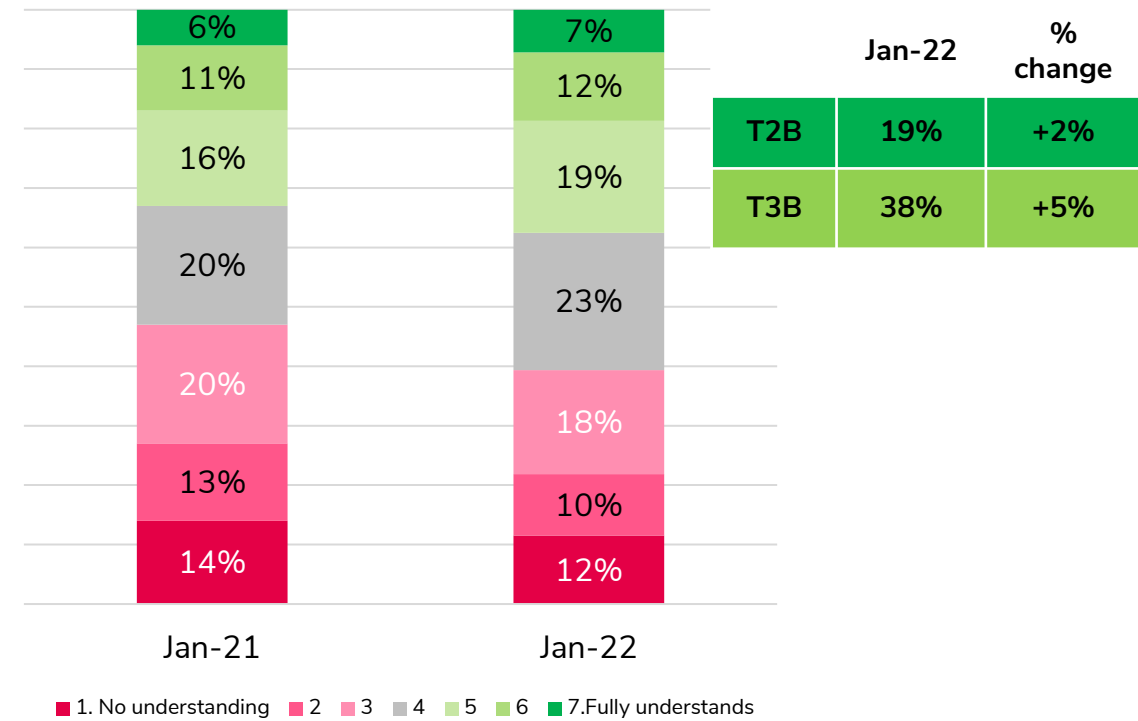
↑ Denotes a significantly higher score vs Jan - 21

More Postmasters feel valued in this research, although many still think Post Office does not understand the day-to-day challenges of running a Post Office

Do you feel valued by Post Office for what you do?*



To what extent do you feel Post Office understands the day-to-day of running a Post Office?



B2 Do you feel valued by Post Office for what you do?
 B4 . To what extent do you feel Post Office understands the day-to-day of running a Post Office?
 Base wave 1 1,767, wave 2 1313

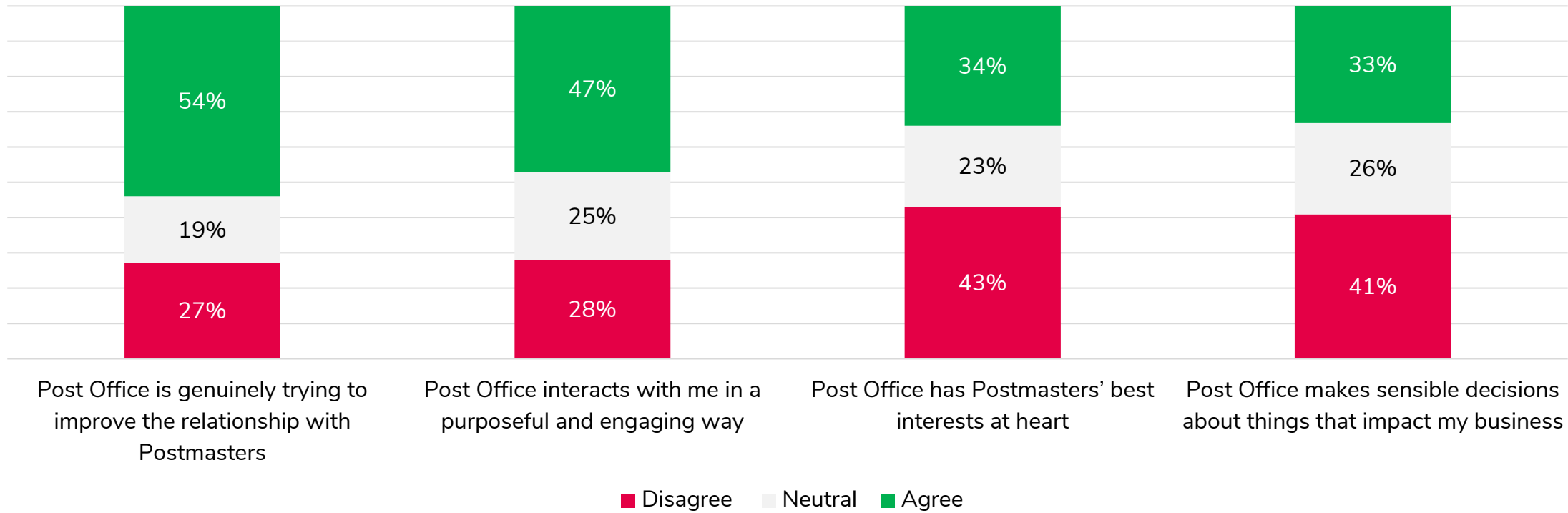
*Slightly different question wording deployed in wave 1 vs wave 2

Half think Post Office is genuinely trying to improve the relationship but only one in three think their best interests are at heart – we think this feeling is connected to the issue of remuneration

“I think they are trying to make things better”

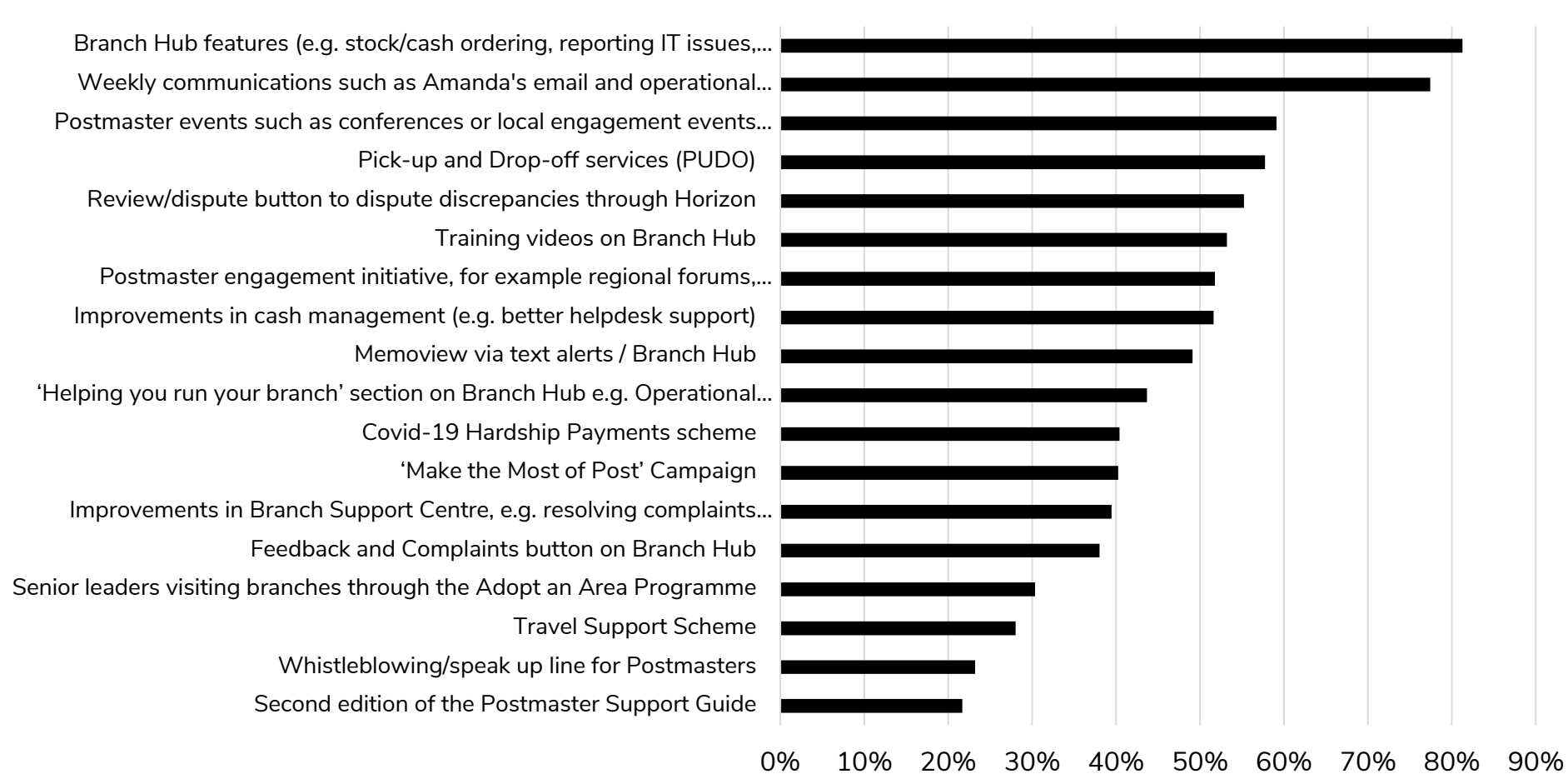
Trust statements
Top 3 and bottom 3 nets shown

“But do they really ‘get’ the challenges I face?”



Branch Hub features and weekly comms (e.g., Amanda’s email) are the most salient initiatives but most can identify at least 5 initiatives in the last year – testament to the hard work of the relevant teams

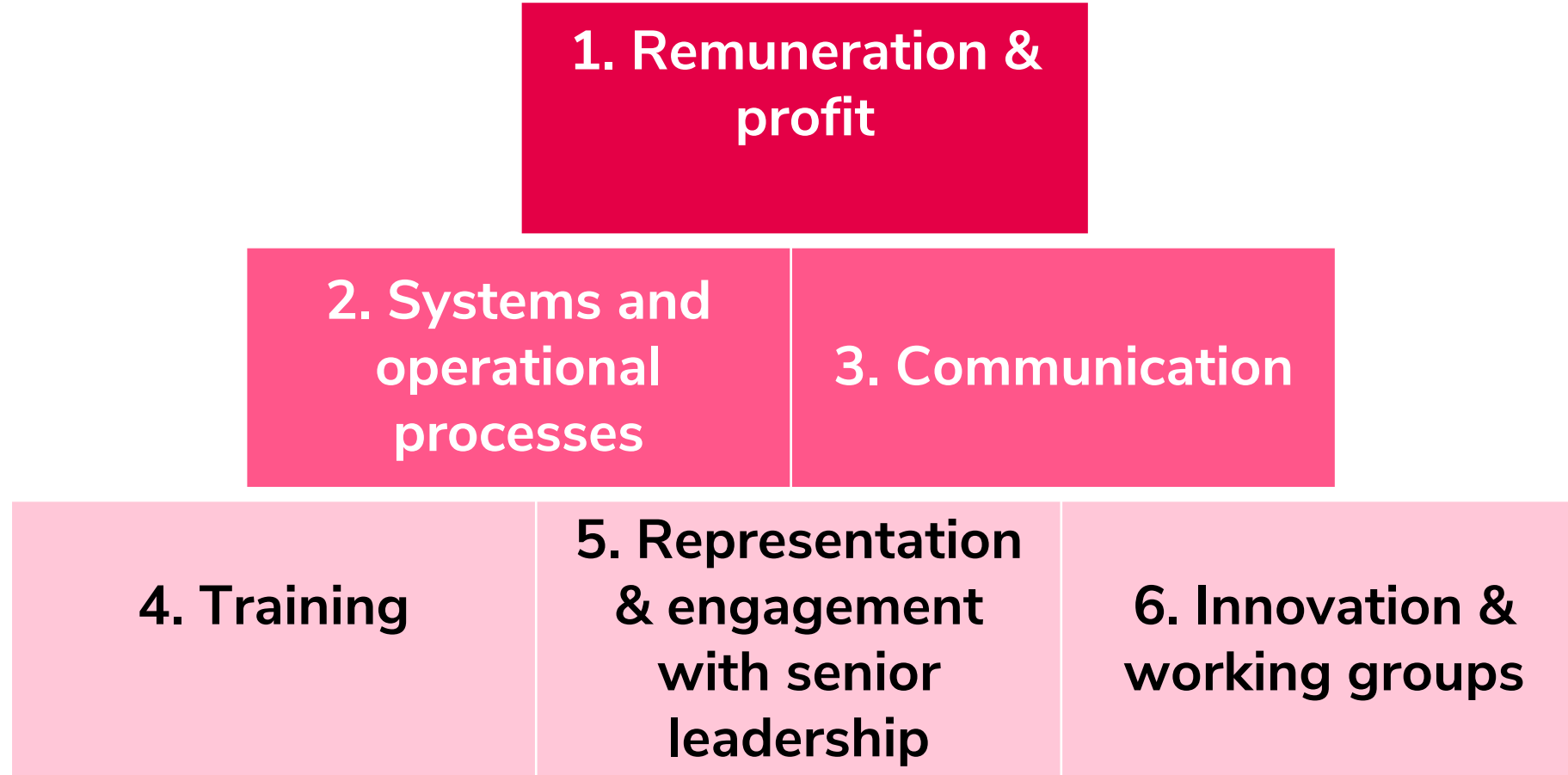
Awareness of Postmaster initiatives in last year



Aware of 10+ initiatives	40%
Aware of 5-9 initiatives	34%
Aware of less than 4 initiatives	26%

Progress update on priority areas 2022

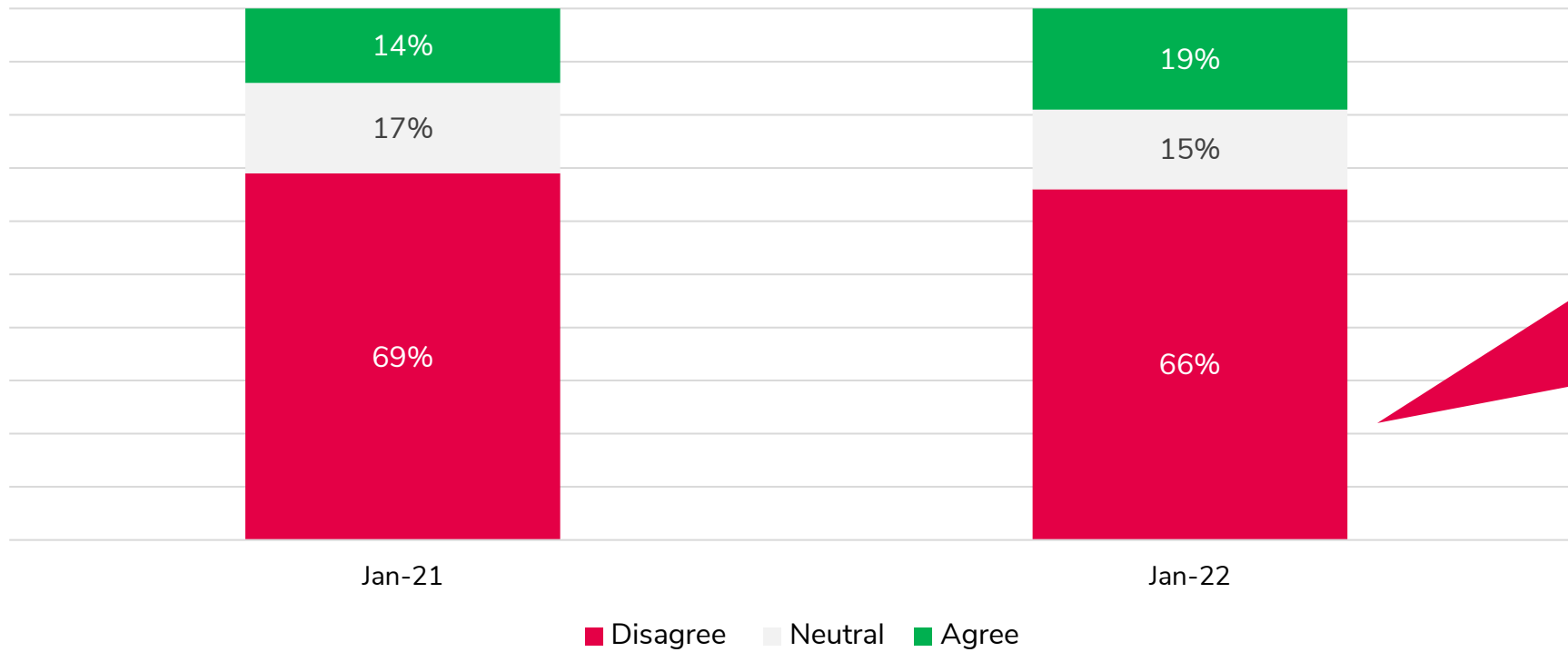
12 months ago, Postmasters identified 6 core areas for improvement



The majority of Postmasters continue to think they do not receive appropriate remuneration for the products/ services they deliver

Agree/ disagree with.... Postmasters receive appropriate remuneration for the products and services that they deliver?

Top 3 and bottom 3 nets shown



“Remuneration! Post Office should be realistic when it comes to individual branches and have more understanding about what is happening on a day-to-day running of the counter.”

Postmaster verbatim indicates concerns about remuneration encompass take-home pay and a desire for better commerciality/ innovation

MINDSET 1 – TAKE HOME PAY

“Pay us a wage worthy for what we do, the remuneration is a joke. Remuneration is less than it was 7 years ago shocking and shame on the Post Office”

“Salary now is around £600 less than 30 years ago! PO side of business is making me around £4-£5 hourly. Biggest improvement is basically a need for more financial support.”

“Understanding how the Post Office is run on a daily basis and how hard and challenging it can be and reflecting that in remuneration”

“Remuneration is appallingly low and needs to be increased dramatically to make running a PO viable for a business”

“Collaborate with various partners apart from Royal Mail for mail products. **Business banking** drop off which was about to start but not heard anything?”

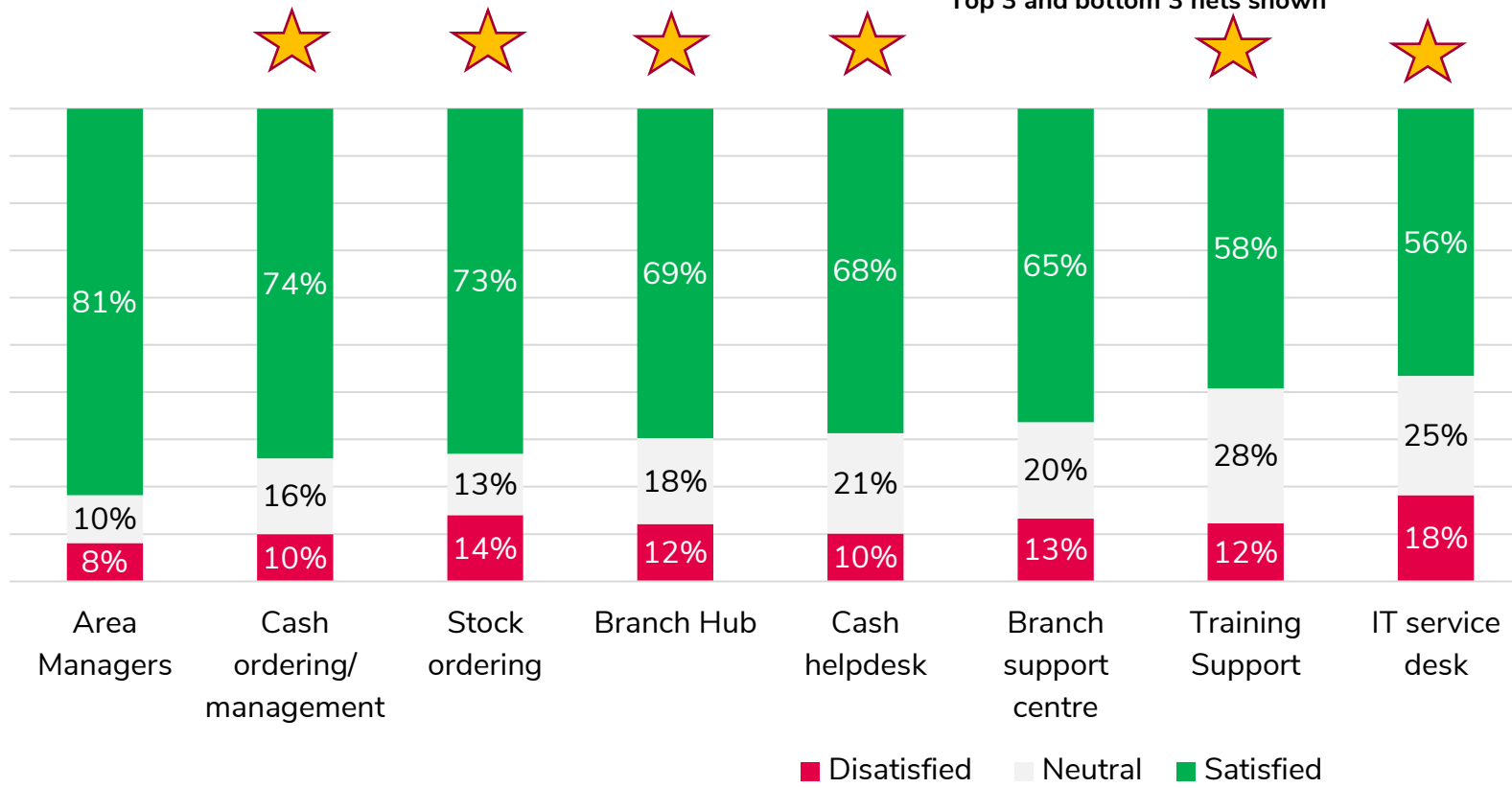
MINDSET 2 – COMMERCIALITY / INNOVATION

“More everyday business instead of hard sell products i.e., insurance, mortgages”

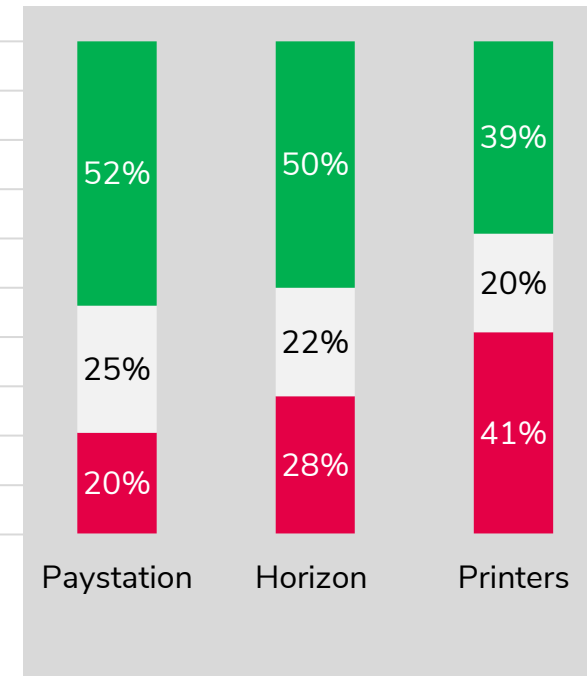
Postmaster satisfaction with operational processes has improved (or at least been maintained) across most measures. Area Managers continue to receive extremely high scores


Satisfaction with operational processes

Top 3 and bottom 3 nets shown



Pain points in wave 1, achieved a similar performance in wave 1

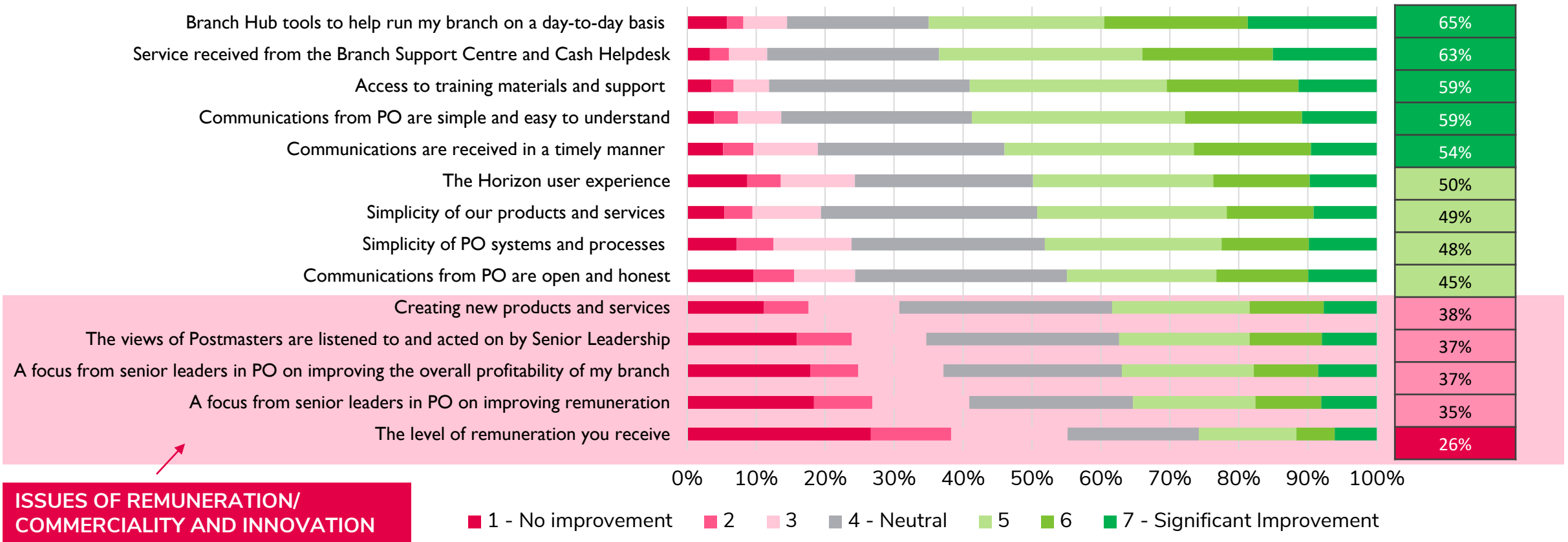


 Denotes where a significant improvement is visible in Postmaster feedback

D2 We are interested in understanding how things have changed in the last 12 months. Please state the extent to which you are satisfied with the way in which the following work for you
Base wave 2 1313

Postmasters recognise there have been widespread improvements, particularly in relation to operational processes/ support, but few feel their key concern has been addressed

Improvements in priorities



**ISSUES OF REMUNERATION/
COMMERCIALITY AND INNOVATION**

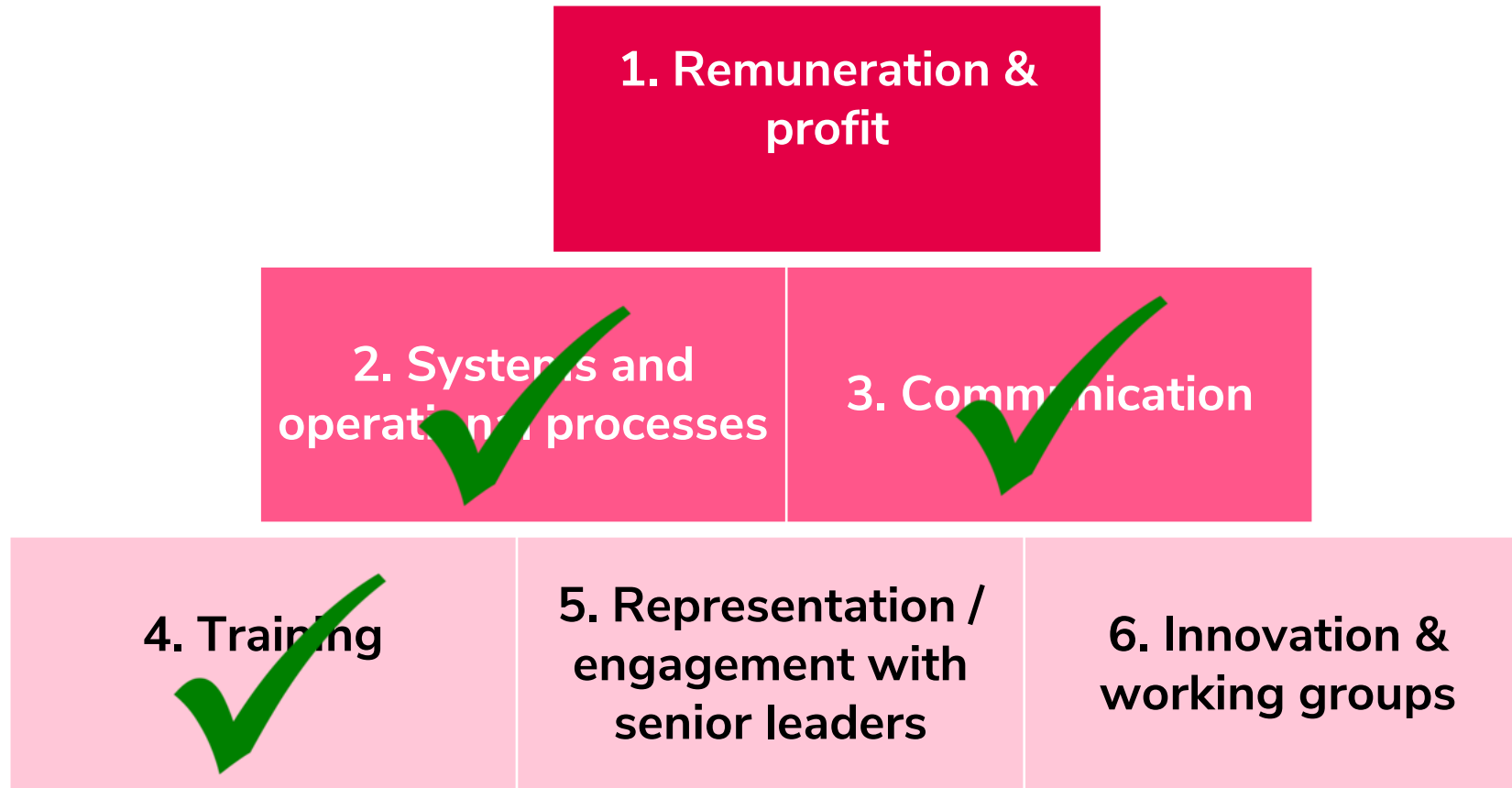
E2a Thinking about the priorities highlighted in the last research, to what extent have there been improvements in each of the areas listed in the last 12 months?

Base wave 2 1313

Confidential – internal purposes only

Conclusion

Of the 6 areas we can identify clear improvements in at least 3 - look to maintain these gains in the next 12 months



Improved performance driven by ...

Strong, consistent performers

- Area Managers

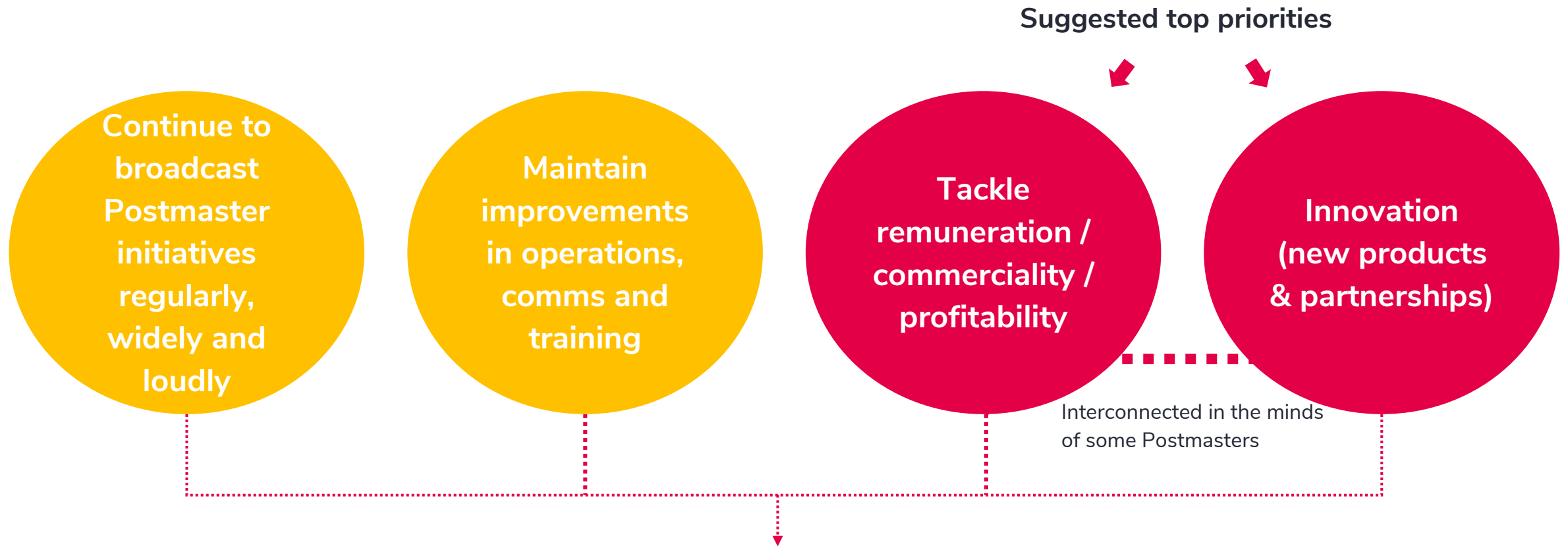
Improved since wave 1

- Cash ordering / Cash helpdesk
- Stock ordering
- Branch Hub
- Training
- IT service desk
- Comms

Needs further work

- Printers
- Paystation
- Horizon
- New products/ innovation

The data suggests four key focus areas for 2022



As a result of improvements in these areas more Postmasters may begin to feel Post Office understands their day-to-day challenges/ circumstances, leading to improved relationships overall.

