

Postmaster Sentiment Survey

April 2024



Coverage

1. Introduction & summary
2. Postmaster relationship with Post Office
3. Reaction to this year's key initiatives
4. Perceived performance in the priority areas
5. Communications channels
6. Impressions of the NFSP
7. Impact of 2024 media coverage
8. Summary



Methodology

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

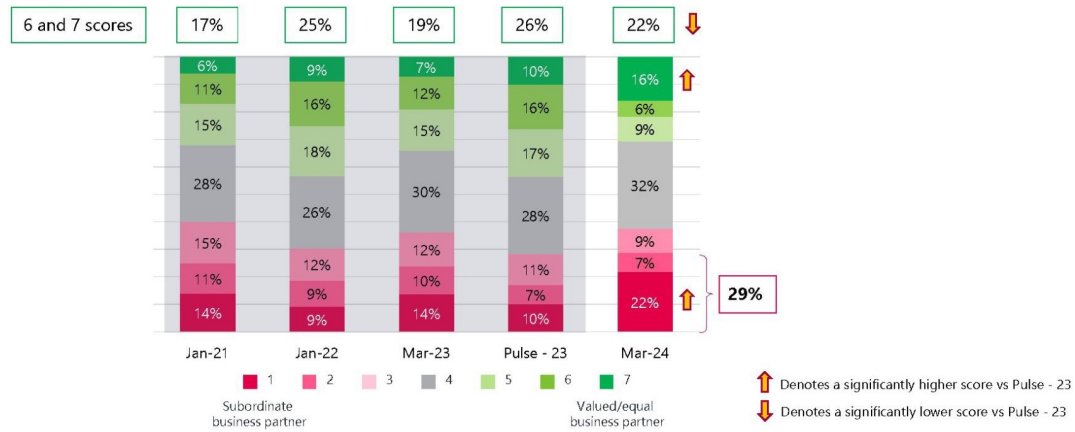
Executive Summary

- 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.

Postmaster relationship with Post Office

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?

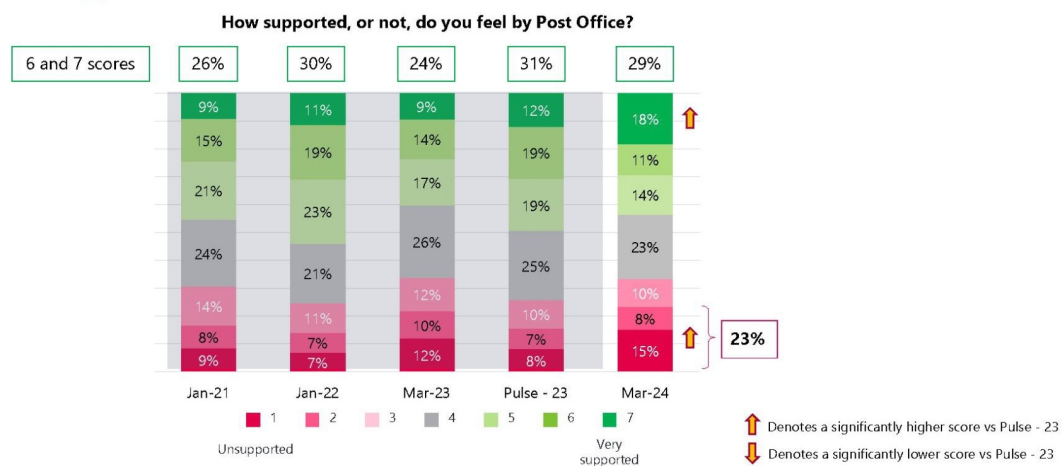


B1 How would you describe the relationship you have with Post Office?
Base wave 1: 1,767, wave 2: 1,313, wave 3: 1,642, wave 4: 1,751 wave 5: 1,917

6

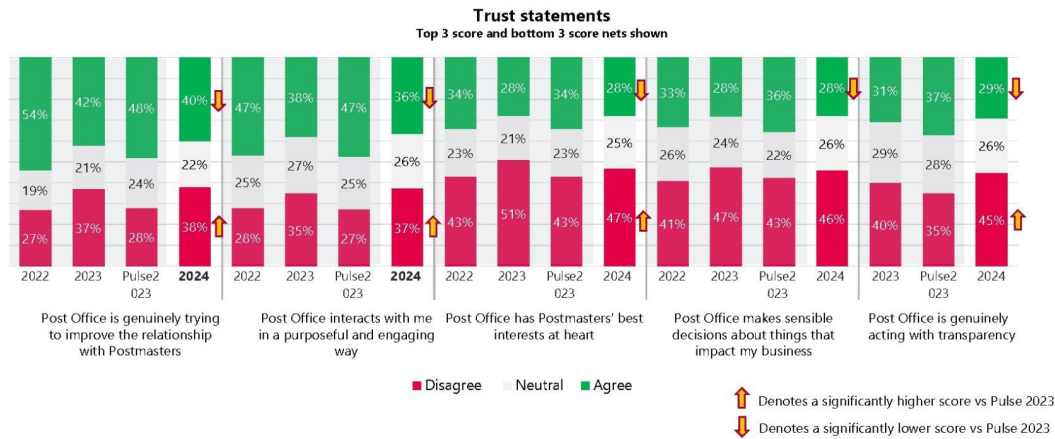
2024 Data checked – 22/04 PH

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



87. 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.

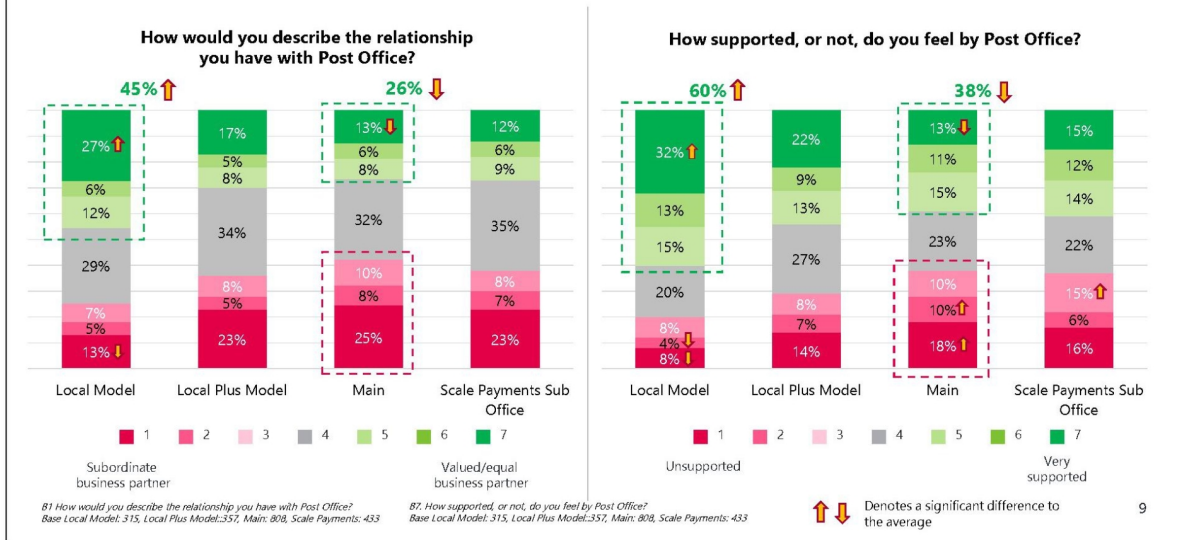


E2New, Please say the extent to which you agree or disagree with the following statements?
Base wave 2: 1,313, wave 3: 1,642, Pulse 2023 1,751, wave 5: 1,917

8

2024 Data checked – 22/04 PH

Local Model Postmasters are significantly more positive than average, especially when compared with those in Main branches.

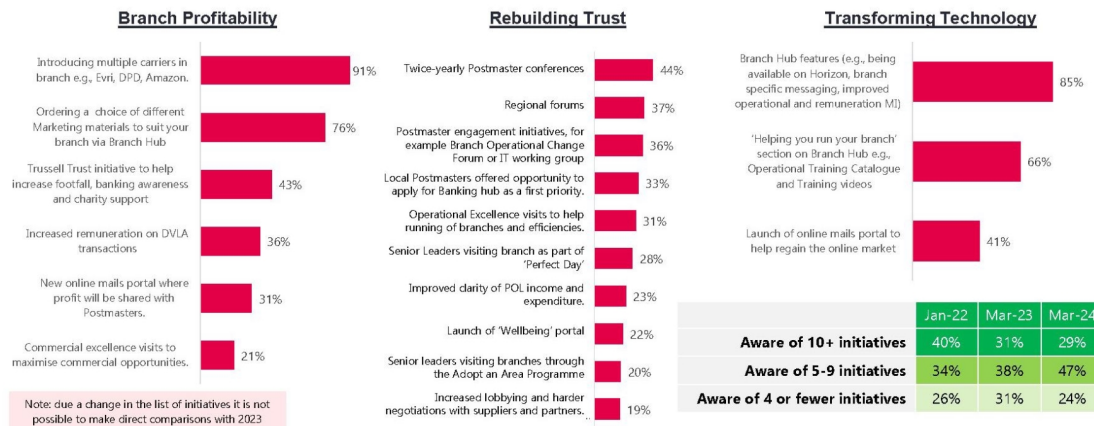


Data checked – 22/04 PH

Reaction to this year's key initiatives

There is very high awareness of the introduction of multiple carriers in branches and changes to the Branch Hub features. Almost all the other initiatives – including those linked to remuneration – have less than 50% awareness.

Awareness of Postmaster initiatives in last year

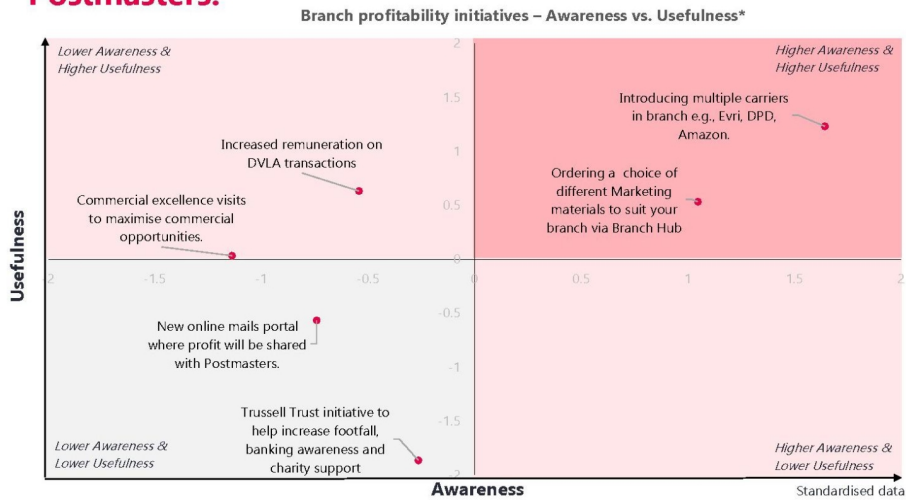


Question: 810A Which of the following are you aware of in the last year?
Base, wave 5: 1,917

11

2024 data checked – 22/04 PH

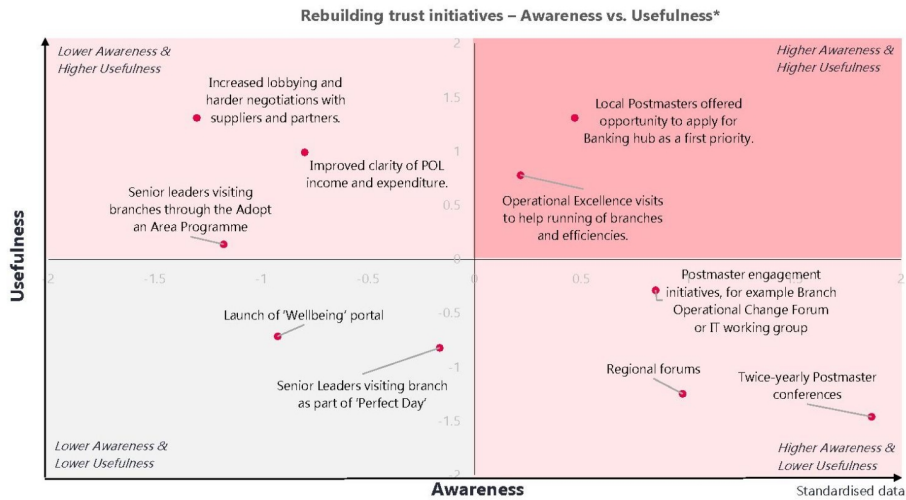
The introduction of multiple carriers and ordering a range of Marketing materials through Branch Hub are positively received by Postmasters.



Question: B10A Which of the following are you aware of in the last year? Base, wave S: 1,917.
B10b, SUM. And how useful did you find each of them? Bases vary; see notes

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

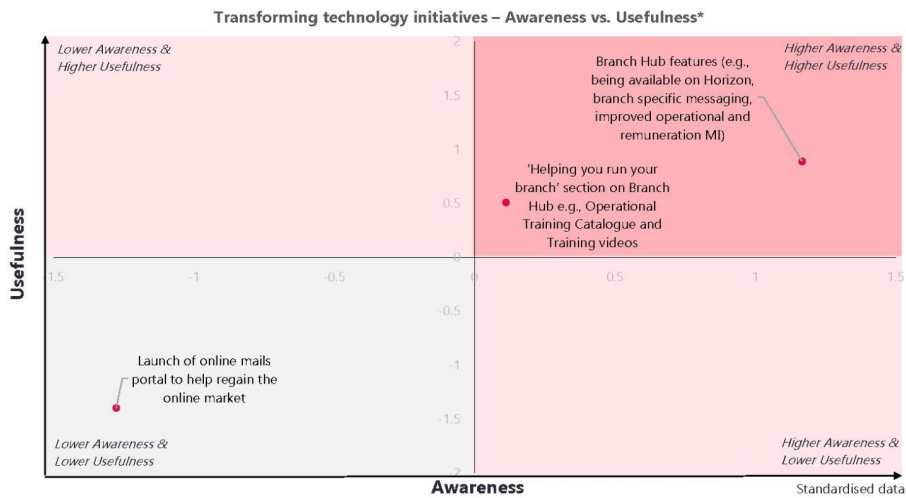
Initiatives which have a direct impact on branches are perceived most useful.



Question: 810A Which of the following are you aware of in the last year? Base, wave S: 1,917.
810b, SUM. And how useful did you find each of them? Bases vary; see notes

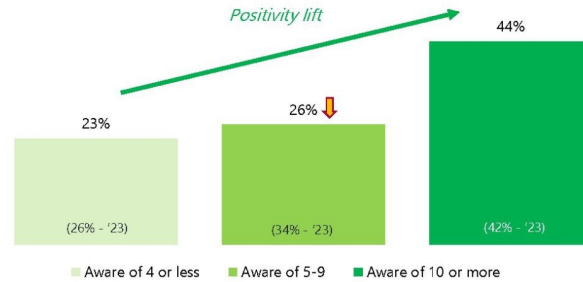
* Usefulness = top 2 score on a 7-point scale

Branch Hub features are both well recognised and relatively popular.



As in previous years, those aware of many initiatives are more likely to say they have a positive relationship with Post Office, reinforcing the importance of 'shouting loudly' about key initiatives.

**How would you describe the relationship you have with Post Office?
Scoring 5, 6 or 7 positive**

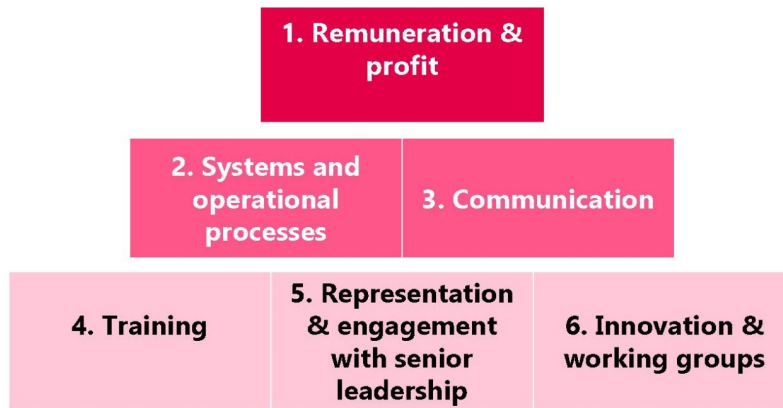


Question: 81 How would you describe the relationship you have with Post Office?
Base aware of 4 or less: 456, aware of 5-9: 910, aware of 10+: 351

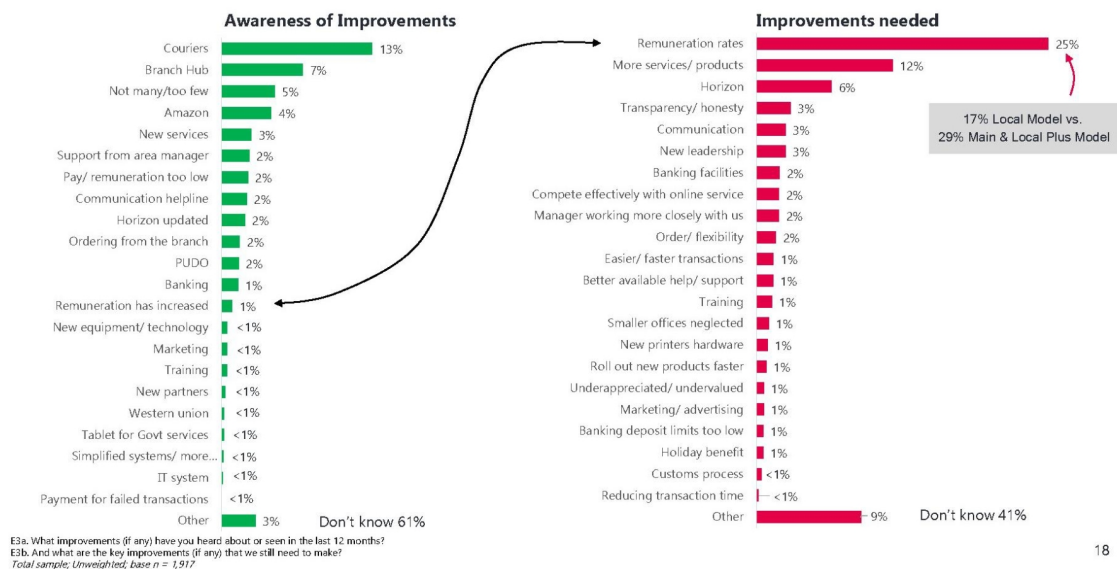
Denotes a significantly higher score vs Mar '23
 Denotes a significantly lower score vs Mar '23

Perceived performance in the priority areas

Our 6 core priority areas

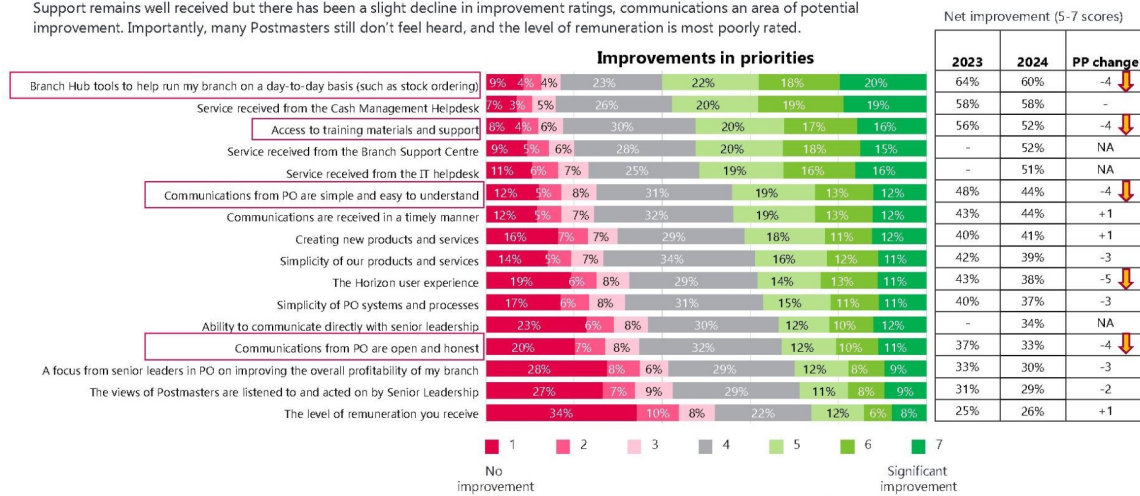


Remuneration remains the top priority for Postmasters.



Generally, there has been a slight decrease in Postmasters' saying there have been improvements in priority areas.

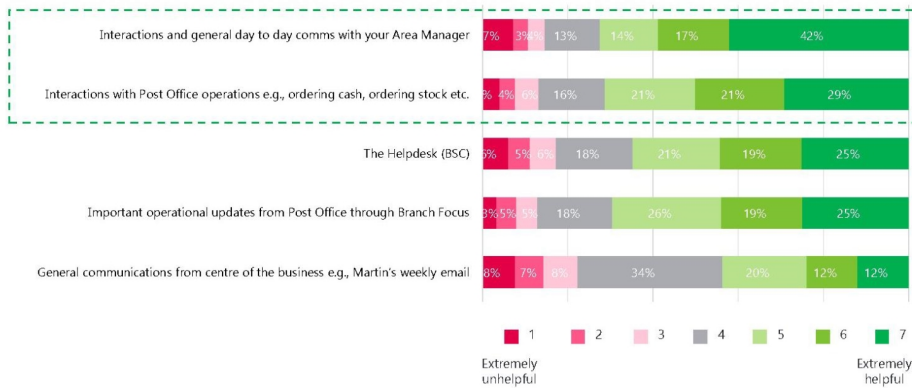
Support remains well received but there has been a slight decline in improvement ratings, communications an area of potential improvement. Importantly, many Postmasters still don't feel heard, and the level of remuneration is most poorly rated.



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

Communications channels

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



D3a_SUM. Please think about the different types of communications/ interaction Postmasters have with Post Office, please rate each on the following: Helpfulness - Summary
Base wave 5: 1,917

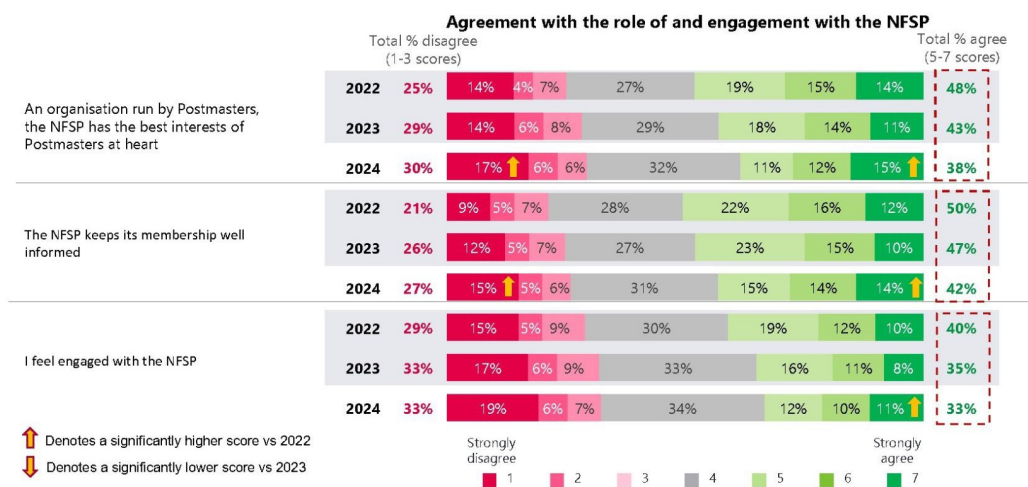
While email and text/WhatsApp are often preferred as communications channels, phone conversations are most popular when dealing with the Helpdesk.

	General communications from centre of the business e.g., Martin's weekly email	Important news/ announcements from Post Office through Branch Focus	Interactions and general day to day comms with your Area Manager	Interactions with Post Office operations e.g., ordering stock etc. The Helpdesk (BSC)	
Text message/ WhatsApp message	36%	40%	60%	30%	31%
Phone call	12%	12%	34%	40%	63%
Email	54%	54%	47%	36%	37%
Post/ Letter	24%	27%	14%	13%	14%
Face-to-face e.g., store visits from senior management	24%	17%	27%	6%	6%
Formal Post Office meetings and events for Postmasters e.g., National twice yea	15%	11%	7%	4%	4%
Informal/ small in-person meetings	19%	15%	23%	6%	5%
Social media e.g., Postmaster Facebook Group	14%	10%	10%	4%	4%
Branch hub/ branch hub notification	44%	47%	21%	51%	32%
Group online conversations e.g., Zoom, Skype, Teams	12%	9%	9%	3%	4%
Newsletters	23%	21%	10%	9%	9%
Don't know	5%	3%	2%	3%	3%

D5. Which of the following methods of communication would you prefer Post Office to use for each different type of communication?
Total sample: Unweighted, base n = 1917

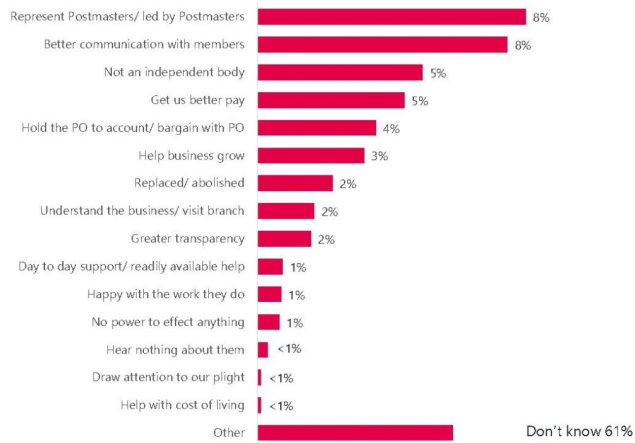
Impressions of the NFSP

There has been a continued decline since 2022 in the proportion of Postmasters who think that the NFSP has their best interests at heart.



Question: E4.To what extent would you agree or disagree with the following statements about the National Federation of SubPostmasters (NFSP)?
Base Wave S: 1,642, wave S: 1,917

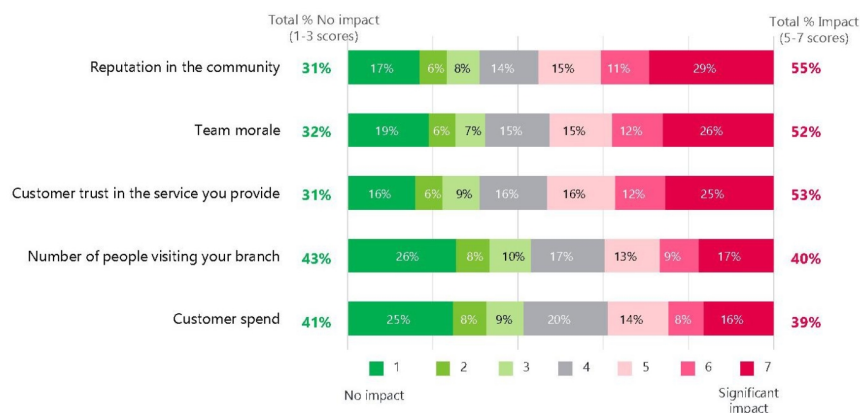
Of those Postmasters who express an opinion, the most common request of the NFSP is for better representation of Postmasters and improved communications with members.



E4a. What could the NFSP do to support Postmasters more effectively?
Total sample; Unweighted; base from 1913 to 1917; total n = 1917; 4 missing

Impact of 2024 Media Coverage

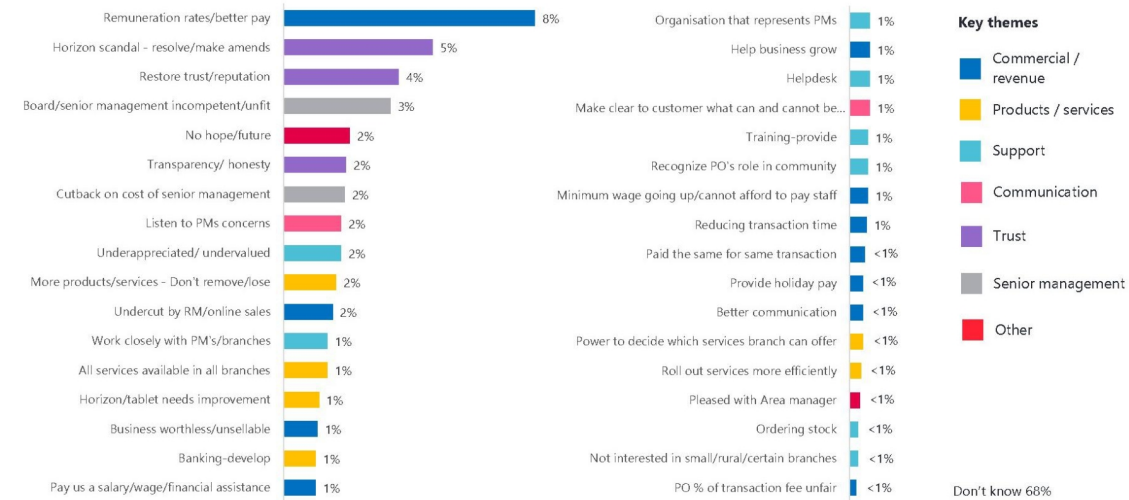
Half of Postmasters believe that 'Mr Bates vs the Post Office' has had a negative impact on their reputation and staff. While the commercial impact is less significant, still around 4-in-10 say customer spend has been impacted.



11_SUM. You will be aware that ITV aired the drama series 'Mr Bates Vs the Post Office' in early January. This was then followed by Post Office and Fujitsu's appearance at the select committee, with political interest and significant media coverage of all these events. To what extent has this had an impact on your business in terms of the following factors: Summary
Wave 5: 1,917

Summary

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

