

Postmaster Pulse Survey

November 2023

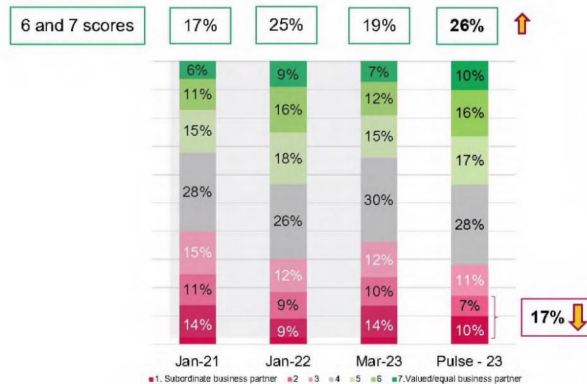


Executive Summary

- Compared to March 2023, there was a significant increase in the proportion of Postmasters pointing to a valued/equal business relationship and a decrease in Postmasters selecting the bottom of the scales in the Pulse survey
- Similarly, there was also a significant increase in the proportion of Postmasters feeling supported and a corresponding decrease in the number of Postmasters selecting the bottom end of the scale
- In terms of the questions which we use to indicate levels of trust, there were also significant shifts across the five metrics.
 - The biggest positive shift was for 'Post Office interacts with me in a purposeful and engaging way' with agreement rising by 9%
 - In addition, although at a lower level of agreement, scores for 'Post Office makes sensible decisions about things that impact my business' also rose by 8%
- In terms of improvements Postmasters would like to see, unsurprisingly remuneration was mentioned most frequently along with transparency/honesty and working closely with Postmasters. However, there were also positive mentions around Area Managers and general positivity
- Although there is still a lot to do, these results indicate that sentiment is moving in the right direction

There has been a significant increase in the proportion of Postmasters pointing to a valued/equal business relationship in hand with a decrease of Postmasters selecting the bottom of the scales vs. March 2023

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



Since the annual survey started, these are the best scores for the top 2 and bottom 2 boxes we have seen.

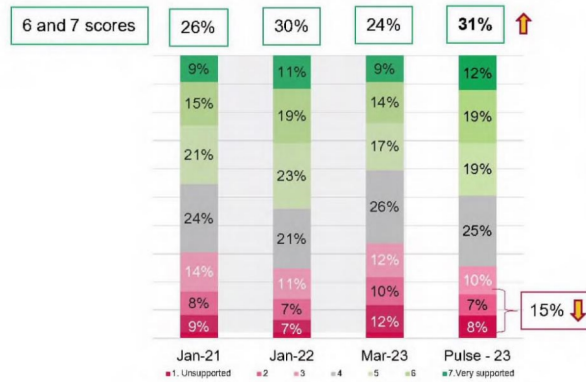
Although we have much to do, we are listening to and communicating what Postmasters have told us need to change, as well as improving our engagement structure.

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

B1 How would you describe the relationship you have with Post Office?
Base wave 1 1,787, wave 2 1,313, wave 3 1,642, wave 4 1,751

There has also been an increase in the proportion of Postmasters feeling supported, in hand with a decrease of Postmasters selecting the bottom of the scales

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

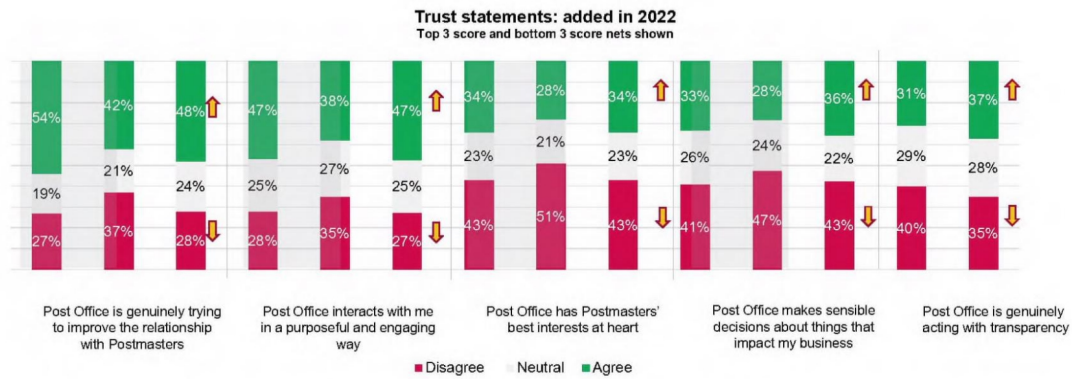


Since the annual survey started, these are the best scores for the top 2 boxes we have seen.

The Commercial excellence visits are supporting PM's improve their business

B7. How supported, or not, do you feel by Post Office?
Base wave 1 1,767, wave 2 1,512, wave 3 1,642, wave 4 1,751

Statements which are indicative of 'trust' between Postmasters and POL also saw a significant improvement in the Pulse survey compared with earlier in 2023



E2Now. Please say the extent to which you agree or disagree with the following statements?
Base wave 2 1313, wave 3 1,642, Pulse 2023 1,751

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

Unsurprisingly, remuneration rates are still the most mentioned issue, but also the need for transparency / honesty and to work closely with Postmasters and branches



Is there anything you would like to tell us that would help improve the relationship between Postmasters and Post Office? N = 949



Full list of coded verbatim comments

Remuneration rates	25%	}	• Provide better remuneration to compensate the work being carried out. • More transparency needed on the decisions made by the management and also share some of the profit with PMs. • Providing help with Holiday cover • Keep PMs informed / involve them early in every change or decision that will impact their business. • Make all products available and pay the same remuneration to all the models types.
Transparency/ Honesty	11%		
Work Closely With Pm's/Branches	10%		
Better Communication	7%		
Pleased With Area Manager	7%		
More Products/Services- /Don'T Remove/Lose	7%		
Listen To Pms Concerns	6%		
Cutback On Cost Of Senior Management	6%		
Happy	5%		
Po Not Interested/Opposing Interest	5%		
Underappreciated/ Undervalued	4%		
Board/Senior Management Incompetent/Unfit	4%		
No Hope/Future	4%		
Help Business Grow	4%		
Horizon/Tables Needs Improvement	4%		
All Services Available In All Branches	3%		
Helpdesk	3%		
Organisation That Represents Pms/More Say In Decision-Making	3%		
Slow To Sort Out Problems	3%		
Training- Provide	3%		
Undercut By Rm/Online Sales	3%		
Pay Us A Salary/Wage/Financial Assistance	3%		
Reducing Transaction Time	2%		
Banking-Develop	2%		
Restore Trust	2%		
Provide Holiday Pay	2%		
Stand Up To Royal Mail	2%		
Not Interested In Small/Rural/Certain Branches	1%		
Power To Decide Which Services Branch Can Offer	1%		
Paid The Same For Same Transaction	1%		
Ordering Stock	1%		
Po % Of Transaction Fee Unfair	1%		
Customer Abuse	1%		
Other	9%		
Don't know/ NA	7%		
Base	94%		

Stand-out Feedback

I witnessed and attended meetings with other post masters and retail directors recently, it was very open dialogue meeting and good amount of feedback was given. More of these meetings and dialogues can help breach a gap between PMs and POL

We always get help and support from post office and our area manager visits my branch and updates all staff

The post office is doing a better job now then in the past and your area manager give them full credit. And the post office has been doing a lot of things right with banking sector and expanding courier services as well just keep pushing for more

Very supportive to postmaster and thanks to Zoe (AM) and team. They are always good in helping me in any situation if I needed. Many thanks



I do see a lot of relationship building but when you think things are changing there are headlines about another issue from past or present

Overall, very happy and have good communication, and if I need anything there is always someone there to ask and help is available from my area manager. It would be good for Post Office to act as a liaison person so local post offices can meet each other properly at times so we know how we can support each other locally

I'm always helped by Post Office and always get good support from the Post Office manager.

I am really happy that the relationship between postmaster (myself) and the post office with the short experience I have, is running smoothly

Postmaster



Methodology

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

The survey was live for Postmasters to complete between 12th October 2023 and 12th November 2023

1,751 responses were completed by Postmasters, with 949 leaving verbatim comments for review