

# NFSP Member Survey 2021

## Summary of results



# Methodology

- 20 minute telephone survey
- Independent NFSP members (who form the majority of the post office network)
- 1,001 interviews
- Strict fieldwork targets by region and office model
- Response data weighted to be representative of population
- August - September fieldwork
- Results based on all 1,001 responses unless otherwise stated

# Demographics

## Office model

Main	Local	Local Plus	Community	Other
286	231	205	274	5

## NFSP Region

North Thames & East Anglia	South East	Midland	North East	South West	North West	Scotland	Northern Ireland	London	Wales/Cymru
113	72	112	136	111	112	118	60	85	82

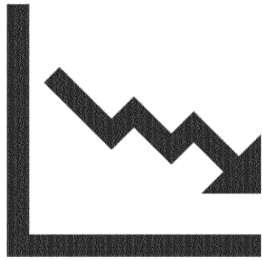
## Length of time as a subpostmaster

Less than 5 years	5 to 10 years	11 to 20 years	21 to 30 years	31+ years
230	284	246	143	92

## Location of office

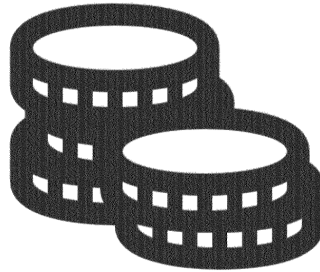
Urban	Suburban	Rural
275	194	515

# The state of the network (1)



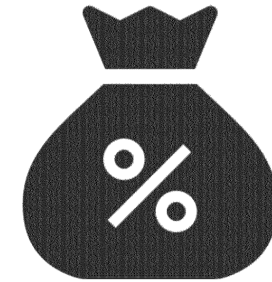
## Personal drawings from the post office going down over time:

- 51% taking home less (61% in 2019)
- 26% taking about the same amount
- 18% taking home more (8%)



## Personal drawings less than the National Minimum Wage (£8.91):

- 70% taking home less than NMW (76% in 2019)
- 13% making roughly the same as NMW
- 11% make more than NMW (8%)



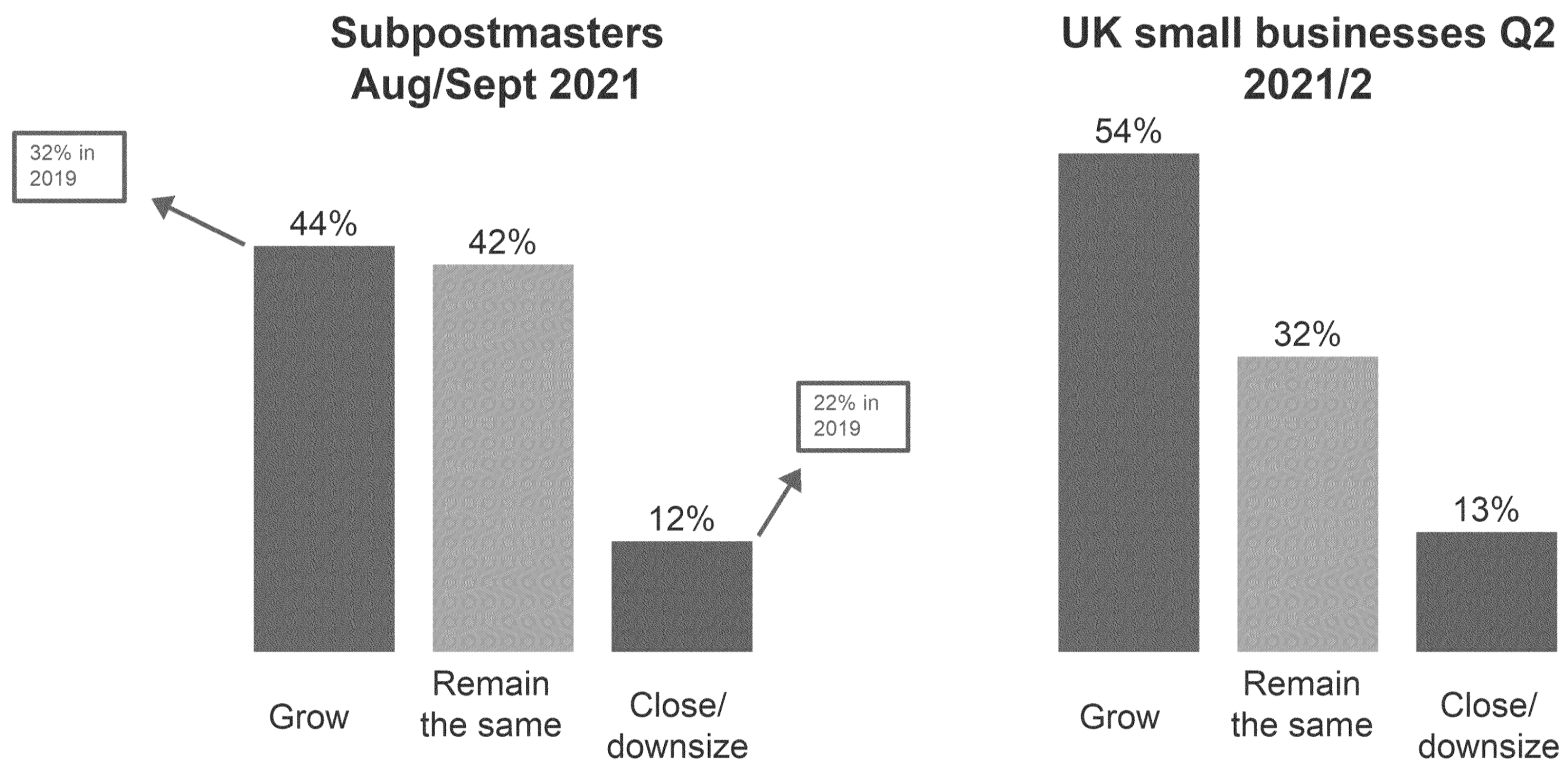
## Retail element more lucrative than post office:

- 47% make more from their retail than their post office (52% in 2019)
- 41% make more from their post office than their retail (36%)
- 11% making roughly the same from both elements

Evidence of some improvement in earnings since 2019 – but this has barely scratched the surface.

# The state of the network (2)

We asked subpostmasters what their plans are for the coming year – replicating a question asked in the FSB's Small Business Index.



# Post Office Ltd



Post Office Ltd listens to subpostmasters

29% agree



The current Horizon system is reliable

41% agree

How successful has Post Office been in resetting the relationship so far?



# Mails (1) perception of mails

Mails are an important area for my post office business

97% agree

Very consistent among different sub-groups

Segregation is important

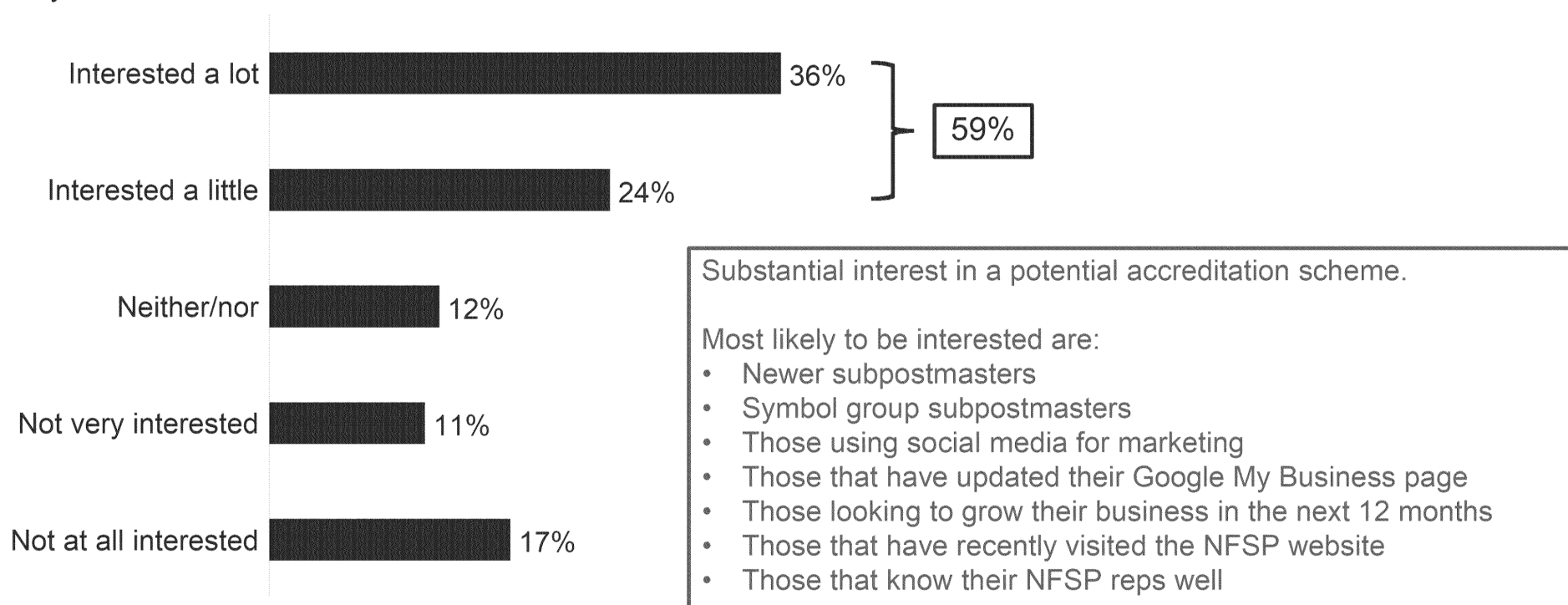
85% agree

Agreement declines significantly with length of service:

< 5 years:	95%
5 – 10 years:	88%
11 – 20 years:	82%
21 – 30 years:	79%
31+ years	72%

# Mails (5) accreditation scheme

The NFSP is considering the development of an accreditation scheme where sub postmasters and their staff can be accredited individually and as a team by an education body for their expertise and knowledge on mails. To what extent would you be interested in such a scheme?



# Retail (1) demographics

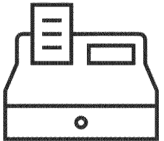


Weekly turnover: average c. £7k

- Symbols – c. 17k per week
- Convenience, non-symbol – c. 7k
- Non-convenience – c. £2.7k



Average basket spend - <5£: 23% / £5-£10: 38% / £10-£20: 21% / £20+: 8%

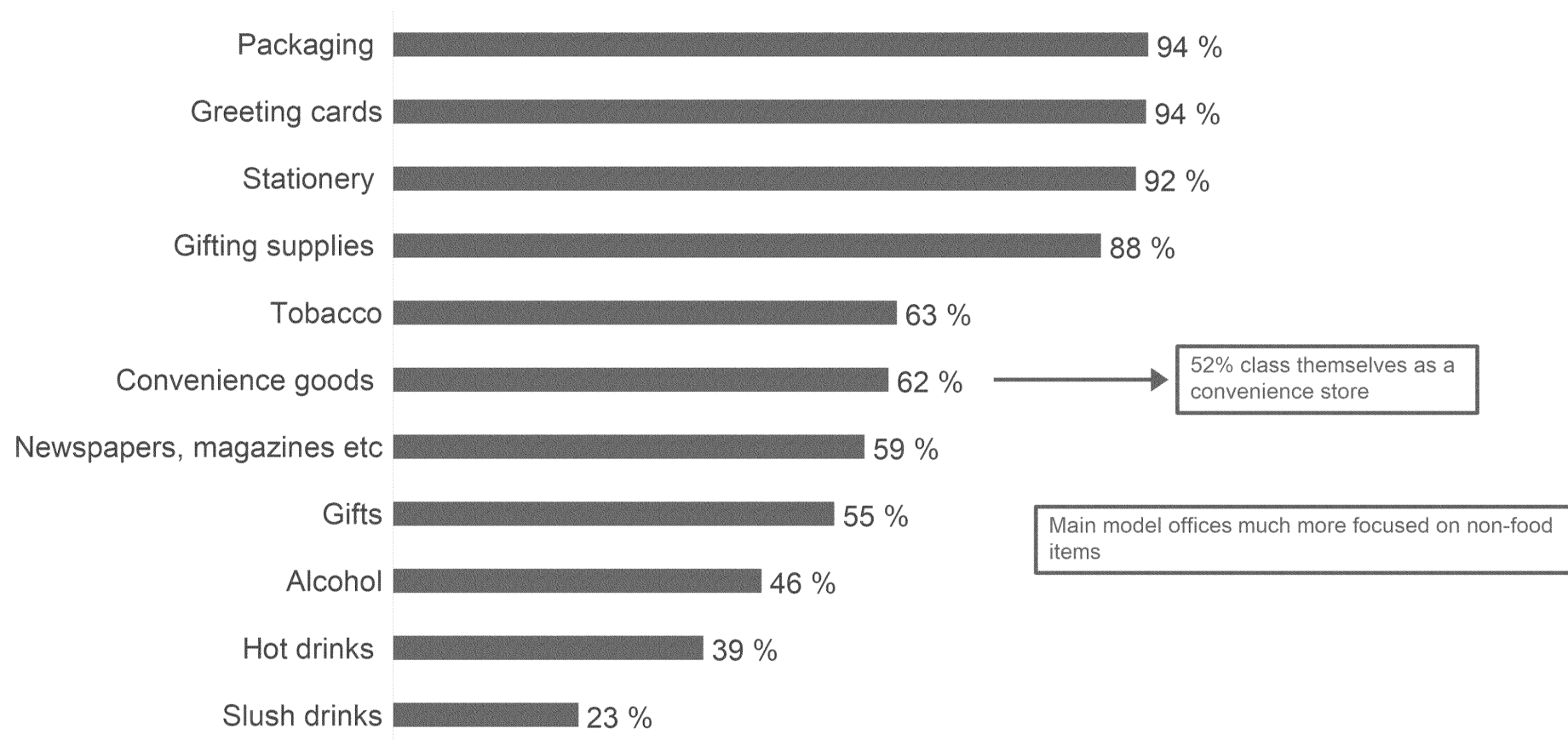


53% have a separate retail counter. Lowest among Main model offices (41%)

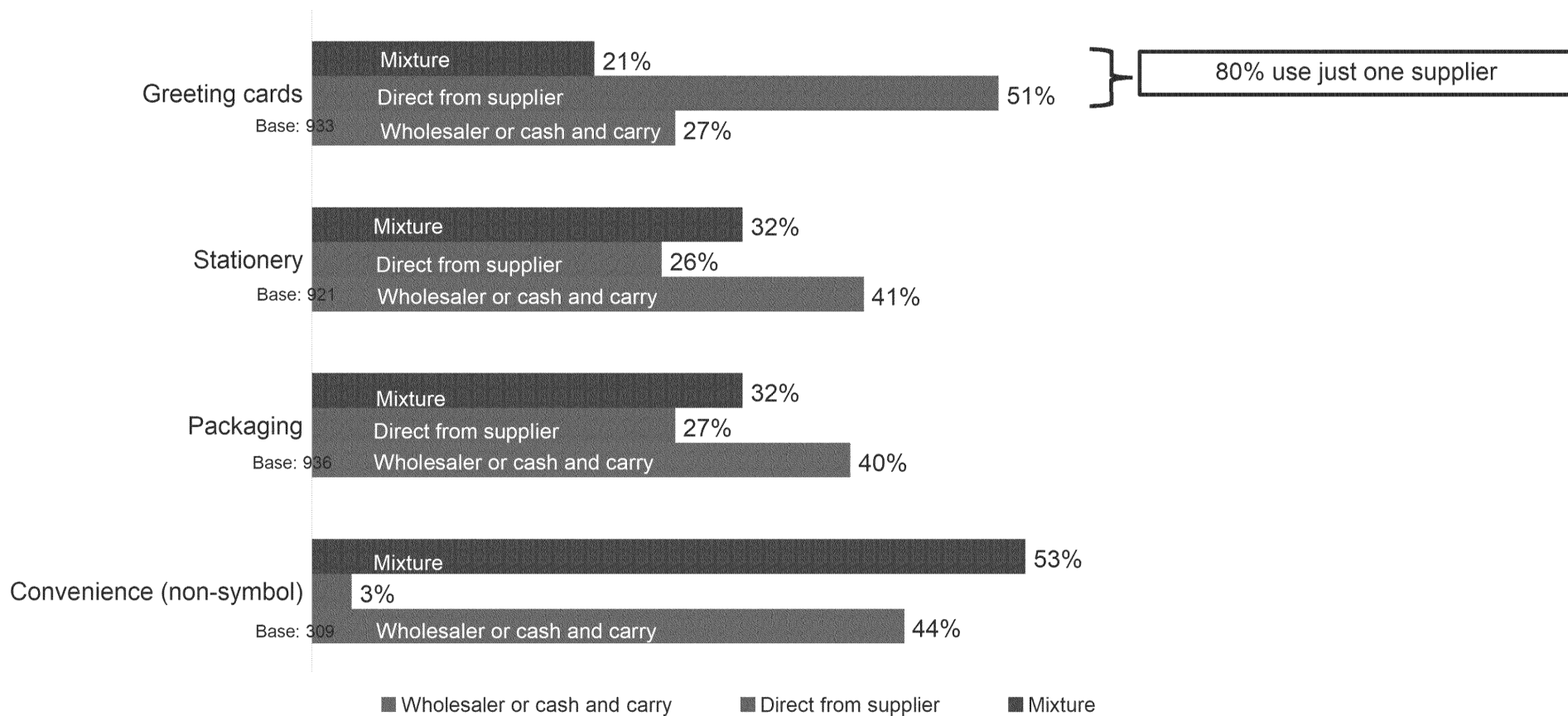


Retail floor space - <500 sq ft: 50% / 500 – 999 sq ft: 23% / 1,000+ sq ft: 28%

# Retail (2) product categories

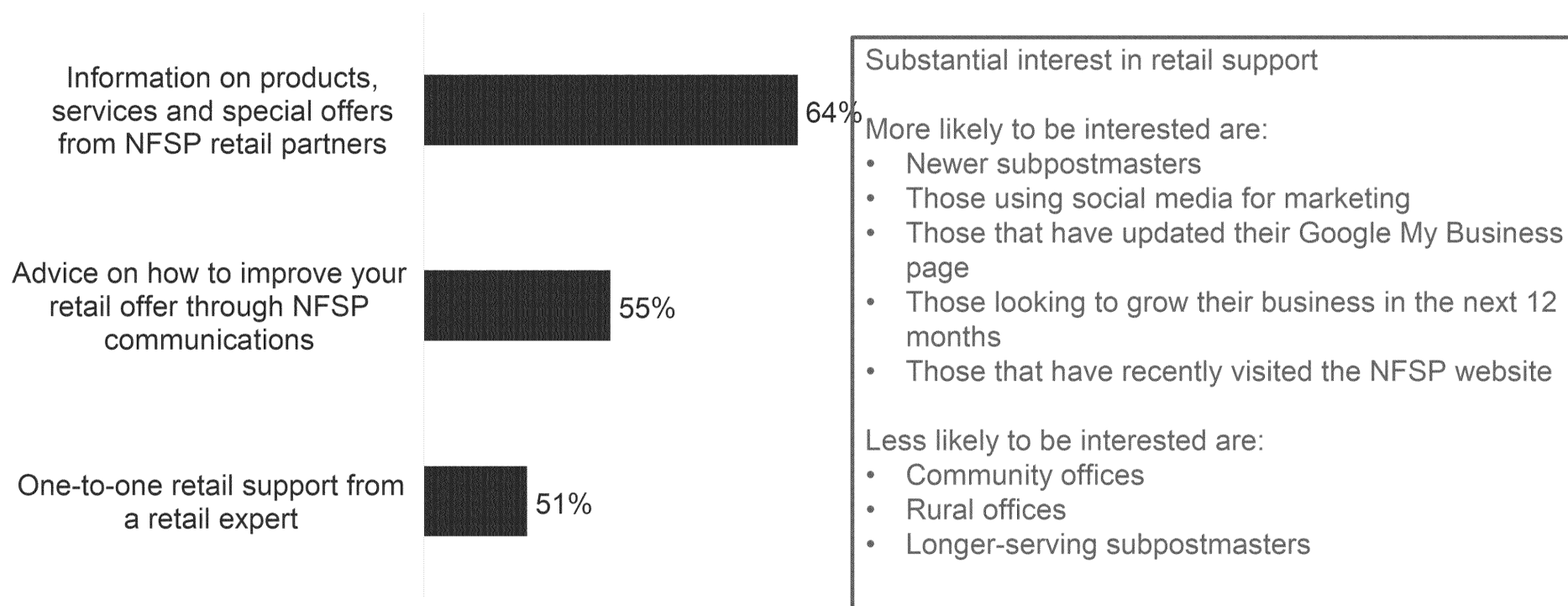


# Retail (4) use of suppliers

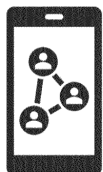


# Retail (6) retail support

The NFSP is looking at how it can support the retail side of your business. How interested are you in the following – all of which would be free for NFSP members...



# Marketing and social media



55% of NFSP members use social media to promote their post office and retail – most commonly via Facebook. 15% have their own website  
45% do not promote their business online in any way



Google My Business

36% keep their listing updated  
10% have allowed PO to take control  
33% have heard of Google My Business but taken no action  
17% have never heard of Google My Business



33% make use of their window displays a lot for seasonal events  
37% do so a little  
29% don't do so at all

Lower propensity to promote the business online among:

- Branches where the post office element is the largest income generator
- Those planning on closing or downsizing
- Longer serving subpostmasters
- Those that haven't visited the NFSP website
- Those who don't know their NFSP reps

# Conclusions (1) the big picture

Evidence of some improvement in outlook on remuneration – but some way to go yet

Subpostmasters more negative than other SMEs in terms of growth prospects

Positivity and progress linked to behaviours associated with improving the business – e.g.

- Engaging with and seeking support from the NFSP
- Marketing the business online
- Upholding standards – e.g. via being part of a symbol group and/or interest in mails accreditation

Serious concerns about the relationship between subpostmasters and Post Office Ltd

# Conclusions (2) corporate strategy and comms

Members want the NFSP to:

- Inform them and be informed by them. Direct interaction is key.
- Improve the profitability and sustainability of their businesses.
- Challenge PO – with greater freedom.

Covid-19 restrictions appear to have impacted on engagement levels by limiting direct interactions.

# Conclusions (3) mails

Indications of attitudinal concerns among certain groups:

- Longer-serving subpostmasters
- Those below target for mails segregation – i.e. poor performance linked to attitude as well as knowledge and training

Mails resources on NFSP website very highly rated – further take-up needed

Definite preference for in-person interventions

Definite interest in mails accreditation scheme

# Conclusions (4) retail and commercial

Member retail demographics now known.

Weekly retail turnover is high. Independent post offices (7,500) turnover c. £2.5b a year

Evidence of latent demand among members for NFSP support:

- Poor practice in use of wholesalers / cash and carry rather than specialist suppliers
- Many branches without card machines or EPOS systems
- Scope to increase online and physical marketing activities

Definite interest in NFSP commercial support – supplier deals, retail advice, one-to-one support

Interest in new retail / commercial categories:

- Hot drinks
- Slush
- Convenience
- Cash counters