**Do consumers, citizens and micro-businesses across the UK have access to easy-to-use, affordable and reliable postal services?**

We recently discussed with consumer-representative bodies across the UK whether postal services – both letters and parcels – could better meet the needs of consumers, citizens and micro-businesses living across the UK. Since the pandemic, consumer reliance on postal services has significantly increased and the parcels market has grown exponentially, however, not all consumers, citizens and micro-businesses are well-served by the postal market.

In 2021, we commissioned qualitative research to gain a deeper understanding of consumers’ experiences of the parcels sector throughout the pandemic. Participants’ stories confirmed our belief that people with specific access requirements and/or living in harder-to-reach geographical areas had limited consumer choice– as outlined below by one of our UK research participants living in a remote rural area.

“The thing I’ve noticed is that Northern Ireland postcodes are excluded from sellers. No Scottish Highlands, Isle of Man, Northern Ireland. There’s either an extra charge, or they just don’t do it. It’s actually a bit annoying.”

(Communications Consumer Panel research participant)

Ofcom also recently published research on postal users’ needs across the UK to inform its review of postal services regulation from 2022 to 2027. The research found that consumers with disabilities were more likely to experience delivery problems and suffer harm as a result. Consequently, as part of its review, Ofcom proposes to introduce new targeted consumer protections for parcel services to improve customer service and complaints handling.

To help feed the consumer voice into [Ofcom’s consultation on its review of postal regulation](https://www.ofcom.org.uk/__data/assets/pdf_file/0028/228970/Consultation-Review-of-postal-regulation.pdf), we invited Ofcom’s policy team to share its proposals with Hub participants, who had an opportunity to ask questions and provide comments. Other organisations also shared research findings and consumer insights on postal issues across the UK – including Citizens Advice, Citizens Advice Scotland, the Consumer Council for Northern Ireland and Disability Equality Scotland. Royal Mail representatives also fed into the discussions.

**We asked our stakeholders whether the consumers, citizens and microbusinesses they represent have access to easy-to-use, affordable and reliable postal services; and how the postal market could be improved to better meet their needs.**

**Highlighted below are key messages that emerged from our Hub participants across the UK Nations.**

1. **Letters remain important even though the market is in steady decline according to Ofcom’s research.**
2. **Postal services should be inclusive and accessible, and postal operators should seek to identify and consistently meet consumers’ and citizens’ individual requirements.**
3. **Postal services remain unaffordable for some consumers, citizens and micro-businesses, particularly those who are financially vulnerable and/or living in rural areas where surcharges are commonplace and consumer choice limited.**
4. **Quality of service should be improved across the postal sector, and where service levels were persistently poor, regulatory intervention should be available.**
5. **Postal operators should use complaints intelligence to understand and help prevent common issues facing consumers in the postal sector.**
6. **Letters remain important even though the market is in steady decline.**
* The postal universal service obligation (USO) currently requires Royal Mail to deliver letters six days a week, however a reduction in the number of delivery days – particularly if Saturday became a non-delivery day – could impact healthcare trusts who commonly post healthcare appointment letters on Fridays.
* People who rely on letter post plan their weeks around knowing which days the post is going to arrive, so any changes should be well-communicated to all parts of the UK.
* People living in Northern Ireland have experienced delays in letter deliveries - from both Great Britain and the Republic of Ireland - and questioned whether the EU exit had impacted postal deliveries.
1. **Postal services should be inclusive and accessible, and postal operators should seek to identify and consistently meet consumers and citizens individual requirements.**
* The parcels sector should promote inclusive communications and allow consumers to contact them via a variety of communications channels. This is particularly important for consumers with specific access requirements such as requiring more time to get to the door or parcels left in a specific place where they can reach them.
* Postal workers and delivery drivers should ensure that where consumers have specified delivery instructions, these are met.
* Postal operators should ensure that consumers can receive communications in accessible formats e.g. braille. An example was provided where a delivery card had been posted explaining where the parcel had been left, but the consumer was visually impaired and didn’t know the card had arrived. To tackle these issues, delivery companies should provide employees with tailored disability training.
* Retailer should consider the packaging they use to ensure data privacy when delivering letters and parcels to consumers who require communications in large print.
* Some organisations representing consumers with specific access requirements had developed best practice guidance for retailers and delivery operators.[[1]](#footnote-1)
* Whilst it was recognised that postal operators, particularly long-standing employees, knew their customers’ requirements well, this knowledge should be held in a central, secure database to ensure that the information was recorded for future employees.
* In terms of research and understanding postal users’ requirements, Ofcom and operators should recognise that a significant number of consumers will not identify as ‘vulnerable’.
* Post Office closures had impacted consumers with specific access requirements, particularly where new locations e.g. retail shops, were largely inaccessible.
* Not all consumers are digitally active or confident engaging online, and therefore information on parcel services and deliveries should also be available offline.
* 65% of people living in the UK are likely be a carer in adult life[[2]](#footnote-2), and therefore communications policy development that affects consumers with disabilities should also consider the caring community. Ofcom colleagues confirmed that its proposals aimed to be inclusive by design and not exclusive to specific consumers.
* Some consumers do not have a permanent address, which makes it difficult to access services. The postal sector should seek to understand different consumer needs and develop initiatives to ensure everyone can access postal services.
* People living in rural areas often don’t have the same variety of services that their urban counterparts have. For instance, access to alternative delivery destinations was considered beneficial for people living in rural areas but not commonplace.
1. **Postal services remain unaffordable for some consumers, citizens and micro-businesses, particularly those who are financially vulnerable and/or living in rural areas where surcharges are commonplace and consumer choice limited.**
* Some consumers find the cost of delivering letters and parcels unaffordable, which is a significant concern in the current climate where the cost of living continues to rise.
* Royal Mail’s discounted rate for redirections is welcomed, however it was felt that provision of the service should be enshrined in regulation to ensure long-term protection for consumers and the eligibility criteria extended to include other welfare benefits e.g. carers allowance.
* There were concerns that eligible consumers were unaware of the discounted rate for redirections. Royal Mail representatives advised that engagement with consumer-representative organisations was ongoing to promote its availability and sign-up rates were being monitored.
* Redirection services remain unaffordable for many consumers, citizens and small businesses who would not be eligible for the reduced rate, which is likely to increase the risk of identity fraud and data breaches.
* The parcels market is highly competitive but mainly for retailers not consumers.
* There were concerns that ‘off-line’ consumers would miss out on online-only postal discounts.
* Some areas, particularly in Northern Ireland and Scotland, face significant postal surcharges and it was questioned whether the uplift in parcel volumes should be driving down surcharges.
* Some people living in rural areas have a limited choice of postal operators and are less likely to benefit from a competitive market. Consequently, people living in rural areas are more likely to rely on the postal USO than users living in urban areas.
1. **Quality of service should be improved across the postal sector, and where service levels were persistently poor, regulatory intervention should be available.**
* Some areas across the UK faced persistent quality of service issues and where operators continued to provide poor quality of service, regulatory levers should be available to enforce improvements.
* Delivery targets imposed by delivery companies were likely to increase the likelihood of consumers experiencing poor quality of service e.g. damaged or lost parcels.
* The Covid-19 pandemic had meant that poor quality of service in the postal sector had been justified in some circumstances. However, participants gave examples of circumstances where parcels had been lost e.g. customer received GPS coordinates that did not exist, and considered that quality of service standards across the whole sector needed to be implemented and enforced.
* Tracked parcels were considered a benefit, particularly for reliability purposes and it was questioned whether tracking should be incorporated into the postal USO.
* People living in remote areas found that the term ‘delivered’ did not always correspond with the end destination. An example was provided where ‘delivered’ indicated that the parcel had arrived at the ferry terminal – not the consumers’ specified address.
* Disability Equality Scotland surveyed its Members on their experiences of the postal sector and found that those living in rural areas had acute concerns about the speed and reliability of their postal services. For example, some people had received information about their Covid vaccine too late, and deliveries of medication had also been delayed.
* Guaranteed postal delivery options are regularly used by small businesses, however delays to deliveries can cause reputational and/or customer relations problems; and financial loss where customers request a refund for parcels that haven’t arrived within the specified time. One particular case in Northern Ireland highlighted this, where a small bakery lost over £3k because of a failure to deliver on time from NI to GB - the items arrived 18 or 19 days late.[[3]](#footnote-3)
* The EU exit has led to confusion around the need for customs declarations forms for parcels to and from Northern Ireland – and clearer communication needs to be filtered down to businesses to avoid unnecessary admin handling fees being passed onto customers.
* Information provided to consumers regarding returns needs to be clear and easy to understand to avoid consumer confusion.
* Only Royal Mail is obligated to provide certain services under the postal USO, however consumers are unlikely to differentiate between a regulated and non-regulated postal operator.
1. **Postal operators should use complaints intelligence to understand and help prevent common issues facing consumers in the postal sector.**
* Complaints processes can be difficult for consumers to locate and channels by which to complain can be extremely limited e.g. some organisations do not take complaints by phone, which is likely to unfairly exclude consumers who rely on phone to communicate.
* All complaints processes need to be inclusive and accessible with a variety of available communications channels.
* Postal operators should take responsibility for consumer complaints or provide clear information on where the complaint should be directed to.
* Complaints can be used for intelligence gathering and help companies to understand the issues facing consumers across the market.
* Postal operators should monitor other communications channels such as social media to identify issues that might not be reported via the complaints process.
* There had been a notable increase in the number of postal services scams since the pandemic began and operators should provide consumers with a clear reporting process.
* It was suggested that all parcel companies – not only Royal Mail - should sign-up to an Ombudsman service.
* Ofcom’s proposals should also focus on preventative measures to combat poor consumer experiences in the postal sector.
* Participants asked how Ofcom would monitor implementation of its proposals and suggested that the requirements be incorporated into the General Conditions.
* Participants encouraged Ofcom to gather more granular data on consumers’ experiences of postal services across each of the UK Nations to help inform the regulator and postal operators of the issues facing UK consumers.
* Participants encouraged postal operators to have a greater presence in each of the UK Nations, to increase engagement and help operators understand local issues facing consumers across the UK.

**Stakeholders who took part in our discussions are listed below.**

* **Mencap**
* **National Federation of the Blind for the UK**
* **NFU Scotland**
* **Ofcom**
* **Ofcom’s Advisory Committees**
* **Older People’s Commissioner**
* **RNIB**
* **Royal Mail**
* **Scottish Government**
* **Society of Chief Officers of Trading Standards in Scotland**
* **Ulster Farmers Union**
* **Wavelength**
* **Welsh Government**
* **Advice Direct Scotland**
* **Age Scotland**
* **The Alliance**
* **Carers Wales**
* **Christians Against Poverty**
* **Citizens Advice**
* **Citizens Advice Scotland**
* **Competition and Markets Authority**
* **Consumer Council for Northern Ireland**
* **COSLA**
* **Countryside Alliance**
* **Digital Equality Scotland**
* **Essential Services Access Network**
* **Federation of Small Businesses**
* **Independent consumer representatives**

**For links to research and insights shared by participants across the Hubs – please see below.**

* [Citizens Advice: The customer journey - disabled people’s access to postal services](https://www.citizensadvice.org.uk/Global/CitizensAdvice/Consumer%20publications/The%20customer%20journey_%20disabled%20people%E2%80%99s%20access%20to%20postal%20services.pdf)
* [Citizens Advice published a league table ranking the five largest parcel operators](https://www.citizensadvice.org.uk/about-us/our-work/policy/policy-research-topics/post-policy-research-and-consultation-responses/post-policy-research/parcels-league-table/)
* [Citizens Advice Scotland: Delivering for all: How vulnerable groups access post in Scotland](https://www.cas.org.uk/publications/delivering-all-how-vulnerable-groups-access-post-scotland)
* [The Panel’s research: Are parcels services delivering what we need in 2021?](https://www.communicationsconsumerpanel.org.uk/research-and-reports/are-parcels-services-delivering-what-we-need-in-2021)
* [Royal Mail statement in response to Ofcom review of postal regulation](https://www.royalmailgroup.com/en/press-centre/press-releases/royal-mail-group/royal-mail-statement-in-response-to-ofcom-review-of-postal-regulation/)
* [Royal Mail: Scam examples](https://www.royalmail.com/help/scam-examples)
* [Royal Mail to cut the cost of its redirection service for millions of lower-income households](https://www.royalmailgroup.com/en/press-centre/press-releases/royal-mail/royal-mail-to-cut-the-cost-of-its-redirection-service-for-millions-of-lower-income-households/)
* Older People’s Commissioner for Wales: Media guidelines for reporting on ageing and older age – click to view in [English](https://olderpeoplewales.com/en/news/news/22-01-18/Media_guidelines_for_reporting_on_ageing_and_older_age.aspx) or [Welsh](https://olderpeoplewales.com/cy/news/news/22-01-18/Media_guidelines_for_reporting_on_ageing_and_older_age.aspx)

**For more information on previous discussions across the Panel’s National Hubs – please see below.**

* In October 2021, Hub participants explored **what excellent customer service looks like and considered the benefits of communications providers developing a Customer Charter**. To read a summary of our discussions and see who took part, [please click here.](https://www.communicationsconsumerpanel.org.uk/stakeholder-engagement/the-panels-national-hubs)
* In June and July 2021, Hub participants fed into **our think-piece on making communications services inclusive and accessible –** [published here](https://www.communicationsconsumerpanel.org.uk/news/latest/post/763-our-top-tips-on-making-communications-services-inclusive-and-accessible-for-all-consumers)**.** To read a summary of our discussions and see who took part [please click here.](https://www.communicationsconsumerpanel.org.uk/stakeholder-engagement/the-panels-national-hubs)
* In May, we held our first UK-wide Hub, bringing together consumer representatives across each of the UK Nations to discuss**the potential impacts of migration to voice-over IP on consumers, citizens and micro-businesses.** [Please click here to read a summary of our discussions and see who took part.](https://www.communicationsconsumerpanel.org.uk/downloads/ccp-acod-uk-wide-hub-summary---migration-to-voice-over-ip.docx)
* In April, our discussions focused on **digital inclusion, skills and confidence; and the importance of equipping consumers, citizens and micro-businesses with the necessary tools to participate digitally**. [Please click here to read a summary of our discussions](https://www.communicationsconsumerpanel.org.uk/downloads/ccp-acod-national-hubs-summary---digital-inclusion-confidence-and-skills.docx), including the key messages and a list of stakeholders who took part.
* In January and February 2021, our discussions focused on the **affordability of communications services and consumer debt -**[please click here to read a summary of our discussions](https://www.communicationsconsumerpanel.org.uk/.well-known/the-panels-national-hubs---affordability-of-communications-services-and-debt-%28summary%29.docx). The summary outlines the key messages that emerged from our discussions and includes a list of stakeholders who took part.
* In September and October 2020, participants discussed**rural connectivity and the types of issues and impacts that communications consumers living, studying or working in rural areas face -** [please click here to read a summary of our discussions.](https://www.communicationsconsumerpanel.org.uk/downloads/summary-of-the-panels-national-hubs---rural-connectivity-%28including-intro%29.docx) The summary includes a list of stakeholders who took part and further information on available connectivity initiatives across the Nations.
* In December 2020, the Panel published research on **scams and fraudulent activity, exploring how consumers have been targeted across communications channels**. Our discussions with Hub participants on the impacts of scams on consumers, citizens and micro-businesses fed into our research recommendations. [Click here to access our cover report, recommendations and full research findings.](https://www.communicationsconsumerpanel.org.uk/research-and-reports/scammed-exploited-and-afraid-)
* In early 2020, during the initial stages of the Covid-19 pandemic, we discussed **the impacts of the Covid-19 pandemic on communications consumers -**[please click here to read a summary of our discussions.](https://www.communicationsconsumerpanel.org.uk/downloads/ccp-acod-national-hubs---covid-19-consumer-issues-%281%29.docx)
1. [Covid-19: Supporting your blind and partially sighted customers](https://www.rnib.org.uk/sites/default/files/RNIB-Best-Practice-Retail-Guidance.pdf) [↑](#footnote-ref-1)
2. [Will I care? The likelihood of being a carer in adult life](https://www.carersuk.org/images/News__campaigns/CarersRightsDay_Nov19_FINAL.pdf) [↑](#footnote-ref-2)
3. [Northern Ireland cake business owner's 'colossal' money loss over Royal Mail delivery issues](https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.itv.com%2Fnews%2Futv%2F2022-01-18%2Fco-down-business-owners-colossal-money-loss-over-royal-mail-delivery-issues&data=04%7C01%7CChloe.Newbold%40ofcom.org.uk%7Ce50e445d249f4d66223208d9e659d3b0%7C0af648de310c40688ae4f9418bae24cc%7C0%7C1%7C637794095748251041%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=JNLc8EhcT90YmpZnrvBzt5JGsI0vrNzwAttTM42NKzU%3D&reserved=0)  [↑](#footnote-ref-3)