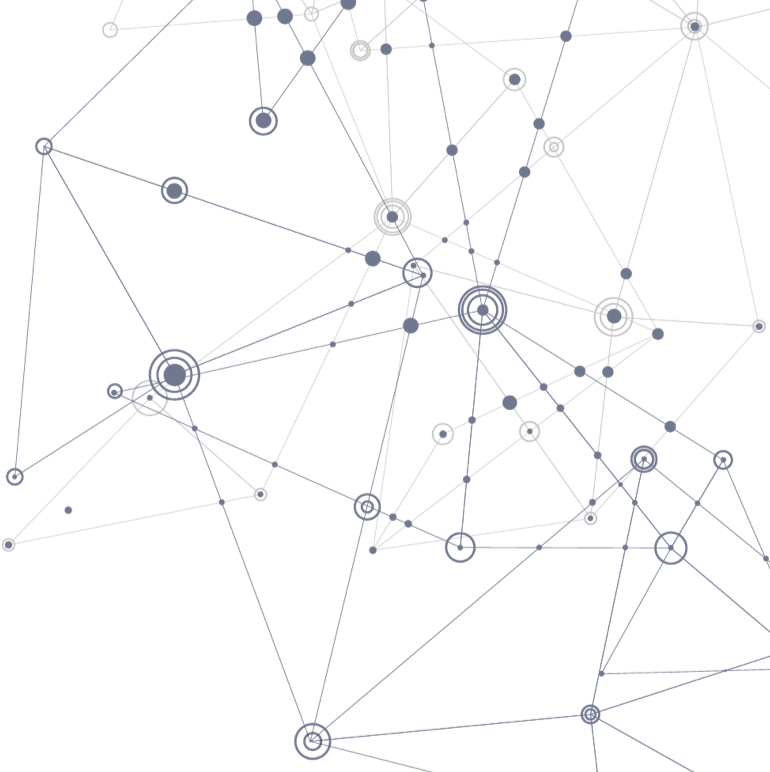


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April 2021

**Delivering satisfaction?   
Meeting service users’ needs for parcel services in the pandemic**

Qualitative research conducted for the Communications Consumer Panel

July 2021

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# Executive Summary

## 1.1 Background

Against the backdrop of the Covid-19 pandemic and the longstanding growth of online retail, parcels have become increasingly important to UK service users. With this dependence on parcel delivery growing and the marketplace changing, there is a question over whether the existing level of regulation of the market by Ofcom is at the most appropriate level for this new context.

The Communications Consumer Panel (CCP) is the statutory consumer panel for the UK communications sector. It carries out research, provides advice and encourages Ofcom, governments, industry and others to look at communication issues through the eyes of consumers, citizens and micro businesses. Given trends in the parcels market, the CCP commissioned BritainThinks to look in more depth at service users with needs that may put them more at risk of detriment[[1]](#footnote-2) in this market.

We completed 40 qualitative depth interviews with parcel service users from the following backgrounds:[[2]](#footnote-3)

* People who because of age, disability, health condition or impairment have specific additional **access requirements** from the postal service[[3]](#footnote-4)
* People in **rural and deep rural** areas
* People running **micro businesses**

Participants were drawn from a range of backgrounds and all four UK nations, but there was a particular interest in including service users in the sample in **Northern Ireland** to understand the impact of the UK leaving the EU after the end of the transition period in January 2021.

## 1.2 Key Findings

1. **Consistent with previous research,**[[4]](#footnote-5) **this research shows parcel service users have a range of needs when sending and receiving parcels.**

* **Certainty:** knowing parcels will arrive within a certain period of time.
* **Reliability:** knowing items will arrive in good condition.
* **Simplicity:** avoiding overly complex processes.
* **Option for urgency:** such as next day delivery if required.
* **Option for tracking:** in particular for offering confirmation of delivery or that a parcel is nearby, but also to provide estimated delivery time slots.
* **Proof of sending:** sometimes required for returns and for those using online marketplaces to sell items.
* **Option for more flexibility:** ease of pick-up if the parcel was not being sent to the receiver’s home (option to collect items from different locations).

1. **This research suggests some needs have become more important, due to heavier use of the parcel service during the pandemic and given continued growth from online shopping.**

* **Reliability,** when there is a greater use of parcels for personal reasons, such as connecting with people who live at a distance and can’t be visited, and business purposes, such as adapting a business to post products to customers unable to visit in person.
* **Affordability,** where increased online shopping has created greater sensitivity around delivery fees, and increased sending, particularly at a time of economic uncertainty due to the pandemic.
* **Personal safety** has also emerged as a new need due to concerns about virus transmission in Post Offices, depots, collection points and when dealing with delivery staff at your address.

1. **Parcel service users in this research were generally satisfied with services for both sending and receiving parcels.**

* Users in all of the target service user groups described positive experiences with parcel services who deliver to them, and in some cases say that no longer having to provide a signature has made receiving a parcel even simpler.
* While the effort required to send a parcel is seen as fairly high and a riskier activity in the context of the pandemic due to the possibility of catching Covid-19 in a building with other people, most were happy they could trust parcel service providers with their items, and the delivery options available were mostly seen as adequate.
* However, this overall satisfaction was in some cases contingent on parcel services not being top-of-mind for many service users, especially before the pandemic. Participants had the space to think about parcel services during the interviews, and it became clear that there was more that could be done to meet the needs of service users.

1. **Many participants in the sample recounted some issues they had experienced in receiving or sending parcels at some point in the last year.** 
   * Examples include parcels being sent to a neighbour without the recipient’s consent, being left unattended at an address or arriving later than expected (people experienced this both when sending to others and when receiving parcels themselves).
   * While none expected parcel services to be ‘perfect’, it was noticeable that service users had limited engagement with the range of providers available to them. Whether due to low awareness of alternatives to Royal Mail and/or the Post Office, or lack of control over service provider when buying items online or receiving gifts from friends and family, users across service user groups described having a limited amount of choice. This placed them at risk of not obtaining the most **affordable or appropriate** service for their needs.
   * Some described a lack of confidence about using local sending services, which they said had become busier at a time when they were trying to avoid crowds for their **personal safety**.
2. **There are other needs specific to each service user group with communication, service coverage, accessibility and familiarity being important. Our research found room for improvement in service delivery to meet these needs in the best way for the target service user groups.**
   * The table below outlines what needs are particularly important to each research service user group. Those marked with an asterisk are being met less consistently by the market.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Consumers with access requirements** | **Rural consumers** | **Micro businesses** |
| *Needs for receiving* | Communication\*  Reliability | Communication  Tracking  Affordability | No specific needs for receiving only. |
| *Needs for receiving and sending* | Accessibility\*  Personal Safety  Certainty  Familiarity\* | Reliability\*  Service coverage\* | Reliability\*  Affordability\*  Certainty\* |
| *Needs for sending* | No specific needs for sending only. | Certainty\* | Service coverage  Option for urgency  Tracking |

1. **Those with access requirements[[5]](#footnote-6) have distinct needs around communication, familiarity and accessibility. There was evidence of detriment across all three of these issues.**

* Some within this group could not find out how to specify access requirements or did not notice prompts for doing so when receiving parcels; others found their instructions about these were not being followed. This could leave some participants unable to bring a parcel indoors without support from other people.
* There was low familiarity with parcel service providers who did not regularly deliver to the consumer’s address. This reduced trust in whether or not access requirements could be met by these providers.
* There were a range of accessibilityissues with physically accessing Post Offices and collection points (e.g. relating to mobility) as well as digital access problems among those unable, for example, to generate a QR code when returning an item.

1. **Rural service users also require effective communication options to improve reliability and service coverage.**

* In some cases, participants described long delivery times and items being lost or going to wrong addresses, when both receiving and sending parcels. Those who reported this tended to live in isolated places or had unconventional addresses.
* ‘Deep’ rural users told us that some providers do not deliver to their address, and others perceived or experienced limited options for sending parcels. For example, some felt limited to one service that was located near them which might not be ideal (for example due to irregular opening hours). These issues meant that some were unable to buy from certain online retailers, and others were frustrated at not being able to exercise the same amount of choice available to service users in more densely populated areas.~~.~~
* Some participants living in rural Northern Ireland and Scotland encountered surcharges when having parcels delivered to their postcodes. In some cases, these surcharges were perceived to be excessively high and dissuaded the participants from purchasing a chosen product.

1. **Micro businesses are a more engaged type of parcel user – in particular when it comes to sending parcels – and rely on parcel services more heavily. There was space for improvement in the reliability and certainty of parcel delivery.**

* There was some frustration about business parcels being left outdoors, being sent to the wrong address, or getting lost. The impact was seen as far greater than when it took place in a personal context, due to the disruption it has on day-to-day operations as well as the risk of causing customer dissatisfaction.
* There were issues around delays and additional costs attributed to EU Exit and the pandemic. While some were able to continue operations without experiencing much change, others found this more disruptive, with a few saying the current level of additional cost and/or delay has led them to reconsider whether or not their current business model was sustainable.

1. **Participants in Northern Ireland – whether micro businesses or service users – all noticed some disruption in early 2021.**

* As with other service user groups, experiences of sending and receiving parcels were mostly positive. But since the end of the initial transition period (December 31st, 2020), there have been instances of parcel deliveries taking longer, or incurring additional fees – particularly when sending or receiving to/from the EU – or deliveries to Northern Ireland being unavailable when ordering items online.

## 1.3 Key considerations

To improve parcel services, we have provided a number of key considerations to bear in mind. These build on service users’ experiences and ideas but are not direct suggestions made by participants. They are outlined in the table below.

|  |  |
| --- | --- |
| Key considerations for all service users | * For receiving – whether, for online shopping, there could be **greater transparency and choice** about parcel service providers at the point of purchase. For example, online retailers and marketplace sellers could be more explicit about which delivery companies they will be using and what options are available, ideally at multiple points in the purchase process. * For receiving – whether service users should be allowed to specify more clearly how to find their address, for example, a field dedicated explicitly to this purpose when ordering from an online retailer. * For sending – whether service users would benefit from **a single hub** (whether in person or online) from which a parcel user can compare and select their parcel service provider. |
| Key considerations for service users with access requirements | * For receiving – whether there are clear and accessible enough **opportunities for specifying access requirements** across retail and parcel service providers. Additionally, whether there is a need to **standardise these opportunities** for ease of completion. For example, it might be easier to provide an access requirement if there is a **central register of delivery requirements**. * How to **enhance accessibility** of Post Offices and other sending services – and how to **improve accessibility information** about postal services. * Whether there could be **more direct contact with drivers** to inform them about requirements, or access to specific **apps that communicate access requirements** across parcel services. |
| Key considerations for rural users | * Whether it would be useful to **classify – or allow service users to classify themselves – as ‘rural’**, to encourage providers to develop specific measures for ensuring parcels reach the right recipient on time. These might include:   + Enabling more direct contact between a driver and service user (e.g. via phone contact to talk through directions over the phone or share more accurate location information using a ‘pin’);   + Allowing service users to provide more information about how to find their address earlier on in the process;   + Asking delivery drivers to prioritise reviewing service user instructions over satnav directions; and   + Providing drivers unfamiliar with the area information about its characteristics. * How to **encourage a wider variety of service providers for sending in rural areas.** For example, having more providers available at a single location may encourage greater engagement, while also lessening the risk of a service having to close down. * Whether **location data** or more **direct contact** with delivery drivers would help decrease the risk of deliveries not being made to the recipient’s address. |
| Key considerations for micro businesses | * **Whether micro businesses need additional financial support** **related to new fees**, and guidance about how to navigate changes related to the end of the transition period. This may be particularly for Northern Irish micro businesses where these problems are heightened and concerns are stronger due to the risk of not being able to continue business within Great Britain. * For sending, whether there should be **more consistent rules and information about pricing** in relation to size and weight across providers. |

# 2. Background and objectives

## 2.1 Context

A number of reports and analyses have been published recently that summarise the current state of the parcel market within the UK. The following section outlines some of the findings and data from these documents to provide context for the findings in this report.

### 2.1.1 The increasing importance of parcel services

Parcel delivery is becoming an ever more important element of the postal service in the UK. While letter volumes have been declining sharply since 2015, as people rely increasingly on online communication, growth in online shopping has seen parcel volumes increase by around 10% per year over the same period.[[6]](#footnote-7) This trend has been accelerated by the Covid-19 pandemic: between April and September 2020 alone, Royal Mail saw a 31% increase in parcel volumes.[[7]](#footnote-8)

At the same time, competition in the parcels market has been increasing. While Royal Mail retains dominance in the consumer-sent parcels (C2X) market for single piece parcel deliveries, it has lost market share for Business to Consumer (B2C) services, as one of 16 national parcel service providers. Here, Ofcom has estimated that in 2018/19, Royal Mail held 70% market share in terms of volume, compared to Hermes accounting for 10-20%, and then Yodel less than 5%.[[8]](#footnote-9) That share is lower among heavier parcels where other operators can offer more competitive pricing.

Previous research has shown that service users (in particular frequent parcel service users such as small and medium-sized enterprises) are increasingly aware of this competition, a trend that has accelerated among younger residential customers since the pandemic.[[9]](#footnote-10) Furthermore, Ofcom has shown that Royal Mail’s costs in the parcels market are increasing, posing a potential challenge for it around maintaining market share.[[10]](#footnote-11)

There has also been disruption to consumer experiences in the context of EU Exit. The Communications Consumer Panel has been made aware by its stakeholders of delays and additional charges to parcels sent between the UK and EU, and between Northern Ireland and both Ireland and Great Britain.

### 2.1.2. Ofcom's regulatory powers in the postal market

Under the Postal Services Act of 2011, Ofcom has the power to regulate all postal operators in the UK, particularly to ensure consumer protection.[[11]](#footnote-12) Ofcom aims to ensure that its regulatory framework is fit for purpose and effective[[12]](#footnote-13). Its objectives, in line with its legal duties, are to secure a universal postal service which is sustainable and efficient, support competition in the wider postal market, and deliver benefits to consumers. To deliver these objectives, its overall framework aims to provide Royal Mail, the universal service provider, with commercial flexibility supported by a number of safeguards, along with limited regulation in increasingly competitive areas of the market.

In 2012, Ofcom introduced a new regulatory framework to meet its legal duties and regulatory objectives, recognising the challenges facing the postal sector and Royal Mail at the time. It considered that the best way to do this was for Royal Mail to determine how best to meet the challenges it faced. It therefore decided to simplify the regulatory regime and provide Royal Mail with greater commercial flexibility, both pricing and operational, supported by a number of safeguards, together with limited regulation in increasingly competitive areas of the market (e.g. parcels). The key regulatory safeguards were:

• Affordability. A cap on the price of Second Class stamps for letters and parcels up to and including 2kg so vulnerable consumers could access a basic universal service;

• Competition. It required Royal Mail to continue to provide access to its network for bulk letter competitors; and

• Monitoring. An effective and on-going monitoring regime to track Royal Mail’s performance in respect of the universal service, efficiency levels, pricing and competition.

In 2017, Ofcom noted that there had been a number of significant developments in the postal market since it first set the regulatory framework in 2012. These included an intensification in the level of competition and innovation in parcel services. The regulatory framework was therefore updated to take account of changes in market conditions and set out to deliver a number of regulatory outcomes, again balancing the increased commercial flexibility provided to Royal Mail with a number of safeguards. As set out in its annual monitoring reports over the years since 2017, this trend for growth, competition and innovation in the parcels sector has continued over the last five years and been amplified further by the Covid-19 pandemic.

Under the Universal Service Obligation (USO), Royal Mail’s collection and delivery of consumer-sent (C2X) parcels must be provided at least five days a week and at a uniform price across the UK. Other services, however, such as business-to-consumer (B2C) deliveries, and other providers, are not regulated by the USO.

As this report goes to press, Ofcom are inviting views on whether the framework remains fit for purpose or whether any changes are needed given a market which is rapidly changing and where a number of challenges are being faced. These challenges and changes include:

* Increased service use;
* Risks to the financial sustainability of Royal Mail’s universal service;
* The potential for change related to the EU Exit; and
* The larger role being played by companies not obliged to meet the USO.

## 2.2 Background

### 2.2.1 The Communications Consumer Panel

The Communications Consumer Panel (CCP) carries out research, provides advice and encourages Ofcom, governments, industry and others to look at issues through the eyes of consumers, citizens and small businesses.

The CCP is often described as a ‘critical friend’ to Ofcom. It provides robust and independent advice that is constructive, realistic and cognisant of the trade-offs which regulatory decisions often involve. This is made possible by the fact that Ofcom shares information and ideas with the CCP early in the regulatory process before consulting formally with other stakeholders. The CCP publishes information about its advice and activities on its own [website](http://www.communicationsconsumerpanel.org.uk/).

### 2.2.2 Research focus

Given trends in the parcels market, the CCP commissioned BritainThinks to look in more depth at consumers with needs that may put them more at risk of detriment in this market.

Previous qualitative research has identified a range of consumer needs in relation to sending and receiving parcels. We identified the following service user groups as key groups whose needs it was important to understand in greater depth:

* People who because of age, disability, health condition or impairment have specific additional **access requirements** from the postal service;[[13]](#footnote-14)
* People in **rural and deep rural** areas; and
* People running **micro businesses,** including sole traders and businesses with 1-9 employees.

In addition, while it was considered important to ensure research participants were drawn from all nations, there was a particular interest in including service users in the sample in **Northern Ireland** to understand the impact of the UK leaving the EU after the end of the transition period in January 2021, to see if this had affected the experience of parcel services

## 2.3 Objectives

The main research objective was to **more fully understand customer needs and experiences of parcel services among three key groups of users**. In particular, to:

1. Explore in depth what customers need from a parcel service and the extent to which these needs are currently met, especially among groups with requirements due to health, disability, age, or location;
2. Understand how they currently access these services, how this has changed during the pandemic, and what they expect from the future; and
3. Explore the extent to which customers face constraints on their choice in parcel service, and how the Royal Mail service compares to competitors.

The research set out to explore the following questions:

* What do customers require from a parcel service?
* How do customers currently access parcel services? How has that changed since the pandemic?
* Do customers have constraints on their ability to exercise choice in the parcel service market?
* How well do customers feel their needs are met by parcel services in the UK?
* How does the USO-governed service provided by Royal Mail compare to their experience of competitors?

# 3. Research approach

## 3.1 Sample

To explore the experiences of parcel users in depth, we recruited 40 participants for a qualitative study. Specifically, we wanted to understand participants’ interactions with a range of service providers for both sending and receiving, and how these varied depending on a user’s individual circumstances and needs.

***Service user type***

To ensure that the research drew on individuals able to recall their experiences of parcel services, we targeted participants who stated they felt *very* or *fairly* reliant on parcel services (a definition which 78% of the general population meet).[[14]](#footnote-15) For this reason we also targeted participants who had recent experience of parcel receiving and sending; we applied this and other selection criteria with minimum thresholds to achieve a mix of service user types, as is detailed in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Service user type** | **Target quota** | **Achieved total sample** | **Further detail on achieved sample** |
| Has access requirements due to age, a health condition, impairment or disability[[15]](#footnote-16) | 16 | 20 | * 17 who had sent a parcel in the last month (following a recruitment target of minimum 4) * 20 who had received a parcel in the last month (participation requirement) * Mix of reasons for having an access requirement (based on a target of a mix of health conditions): * 3 with both physical and mental health conditions * 15 with physical health conditions * 2 with mental health conditions * 4 were aged 80+ |
| Lives in a rural / deep rural area | 16 | 21 | * 14 who had sent a parcel in the last month (following a recruitment target of minimum 4) * 20 who had received a parcel in the last month (participation requirement) * 4 living in ‘deep’ rural areas (participation requirement) |
| Runs a micro business | 10 | 10 | * 7 who had sent a parcel in the last week for business purposes (following a recruitment target of minimum 4) * 9 who had received a parcel in the last week (required of all those who had not sent a parcel in the past week) * Mix of business sizes (based on targeting):   + 5 sole traders   + 3 with 1-3 employees   + 1 with 4-9 employees |

The achieved interviews in each category sum to more than 40 because some service users belonged to more than one service user type, as follows:

* Four rural service users had access requirements;
* Six micro businesses were based in rural areas; and
* One micro business owner had access requirements.

***Additional criteria***

The research sample also included a mix of:

* **Locations:** with participants from all four nations, including eight in Northern Ireland;
* **Social grades:** with a fairly even mix across ABC1C2DE socio-economic groups;
* **Additional criteria relevant to experiences of parcel services:** with some participants using online marketplace selling services, others returning online purchases to retailers, and a few using shared entrance halls when receiving deliveries; and
* **Other demographic criteria:** including gender, ethnicity and age.

A full breakdown of the sample is in the Appendix (see page 83).

## 3.2 Approach

**We asked 40 parcel users to take part in depth interviews, involving a pre-task exercise followed by a 45-minute telephone or video interview.**

1. We first asked participants to completea short pre-task **exercise to capture recent experiences of sending and receiving parcels** in granular detail, to act as a prompt during the interview. This exercise took the form of a ‘diary’ asking participants to describe details of:
   * Items sent/received in the past few weeks;
   * Delivery fees paid;
   * Weight and size;
   * Delivery companies used, and level of available choice;
   * Sender/recipient type (e.g. retailer, friends/family);
   * Additional options used;
   * Whether it arrived on time and in good condition; and
   * Overall feelings about their experiences.
2. We then conducted **a 45-minute telephone or video depth interview** with each participant. Each interview covered:
   * An introduction to the participant’s living circumstances and area;
   * Recent experiences of sending and receiving parcels, and whether or not these met the user’s needs;
   * Typical experiences of sending and receiving parcels;
   * Particularly poor experiences;
   * What an ideal parcel experience would look like;
   * The impact of the pandemic;
   * Perceptions of whether or not parcel service providers meet their needs, how this varies between sending and receiving;
   * Reactions to the idea of creating minimum standards for parcel delivery companies;
   * Anything else that would improve their experiences;
   * Speculation about what post-pandemic and longer-term future experiences could look like.

We conducted fieldwork between the 5th and 19th March 2021, during a nationwide lockdown. There may therefore be some bias in the findings towards describing the needs and experiences of parcel users that exist in the specific context of the Covid-19 pandemic. However, researchers tried to mitigate this risk by exploring participants’ experiences prior to the pandemic and exploring what they would like services to look like in the future.

A full outline of the methodology and topic guide are included in the Appendix (see page 71).

## 3.3 About this report

This report is structured into the following main sections:

* Parcel service users’ needs (Section 4)
* Experiences of sending parcels (Section 5)
* Experiences of receiving parcels (Section 6)
* Current experiences in Northern Ireland (Section 7)

Within each of Sections 4-6, the report first reports on findings common to all three target service user groups, before then reporting on findings by target service user group. In addition, the findings in Section 4 are divided between needs in relation to sending and receiving parcels.

Although we report by target service user group, as we outline in Section 3.1, many in this study belonged to more than one group. An individual living with a health condition that meant access or other adaptive requirements were needed could also be running a micro business, often as a way to earn a living around symptoms of their condition. Similarly, micro business owners may have set up their business as part of their choice to live in deeply rural areas. The needs of any individual in the research were often therefore a unique mix of the needs that we discuss in each of these sections.

# 4. Parcel service users’ needs

## 4.1 Previous research

A previous qualitative study commissioned by Ofcom clearly identified parcel service user needs for sending and receiving parcels.[[16]](#footnote-17) We designed this research to test how those needs varied across and within the particular target groups that we were investigating, plus whether there were additional needs reflecting the individual’s circumstances.

In terms of *sending* parcels, the previous research identified the key requirements to be:

* **Certainty:** knowing the parcel will arrive within a certain period of time;
* **Reliability**: knowing the item will arrive in good condition;
* **Option for urgency:** such as next day delivery if required;
* **Option for increased certainty**: option for an item to arrive at a specific time on a specific date;
* **Option for tracking:** more of a need for micro business owners and those selling items on online marketplaces. Here, tracking was considered most useful in terms of offering confirmation of delivery. Some also used tracking to provide estimated delivery time slots for their customers; and
* **Proof of sending**: sometimes required for returns and for those using online marketplaces to sell items.

In terms of *receiving* parcels, the key requirements were:

* **Reliability** was most important; receivers want the item to arrive, and in a good condition;
* **Certainty:** to know when to expect the item. Tracking and text updates can help here;
* **Option for tracking:** some wanted to have a degree of control over delivery (for example, to be able to select time slots). For those in more rural locations, it was often reassuring to know where your parcel was at all times; and
* **Option for more flexibility**: ease of pick up if the parcel was not being sent to the receiver’s home (option to collect items from different locations).

Across sending and receiving, **simplicity** was also seen as important, with service users wanting parcel services to be predictable and easy to understand.

## 4.2 Needs for sending parcels

### 4.2.1 Summary of most important sending needs for each service user group

We summarise the main needs when sending parcels in the table below:

|  |  |  |
| --- | --- | --- |
| **Service users with access requirements** | **Rural service users** | **Micro businesses** |
| Accessibility  Personal Safety  Certainty  Familiarity | Reliability  Service coverage  Certainty | Reliability  Affordability  Certainty  Service coverage  Option for urgency  Tracking |

### 4.2.2 Many of the previously identified sending needs increased in importance

Because of the increased reliance on parcel services by all types of customer since the outbreak of the pandemic, many of the needs identified in the previous research were felt more strongly by participants in this study at this time. Most important was:

* **Reliability**: whether a private service user or micro business, respondents felt a greater need for parcels to arrive in good condition. Often, they were sending a parcel instead of seeing a family member or friend on a special occasion or fulfilling online orders crucial to their business. Participants in this study from all service user groups recalled the wider range of items they had posted for Christmas in 2020 because they would not be seeing loved ones and how much they relied on the delivery company for it to arrive safely.

"We’re my nan’s only family and we’re 250 miles away so when she needs something […] we send it to her. I send her masks for example. Every couple of months we send her masks and other things we know she needs, she can’t get them for herself."

(Participant with access requirements, England)

Additionally, participants sending parcels were concerned about:

* **Affordability:** with the increased volume of sending parcels, participants had become more sensitive to the price of sending parcels. The previous research established that those making most use of parcel services were more likely to ‘shop around’ to keep costs down. This research showed:
  + That more people have moved into this category and have started to become aware of the choices available.
  + That those living in rural areas attributed the surcharges due to distance as part of the trade-off for where they live.
  + That participants needed parcel services to be good value for money, as well as affordable more broadly.

“We tried to send my son a lot of things and it would cost over £10 to send something, so we separated it into two smaller parcels which ended up being cheaper.”

(Participant with access requirements, England)

* **Simplicity** was also seen as important.Where previous research suggested simplicity was about predictability of parcel receipt (i.e. uniform delivery days across the country) and ease of understanding pricing, this research suggests it was about ease and convenience, more generally.While going to a Post Office or other service was inevitably seen as involving some effort, parcel users wanted the process of paying for and dropping off a parcel to be straightforward. Consequently, those able to use these services appreciated being able to print postage labels at home and then simply drop a parcel off at a Post Office or other sending service without having to queue or interact with staff.

“My Post Office is the default – parking is easy, it’s not very far to walk from the car park. It is completely convenient.”

(Rural, England)

This research also revealed some new needs not identified in the previous research:

* **Accessibility** to sending services. This meant being able to use in-person services, such as a Post Office, or online services, such as printing a returns label.
* **Service coverage.** Participants needed to have multiple sending services available in their location which would send parcels for them. This would allow them to ensure any parcel type could be sent by at least one company and would also provide alternative options if one service was shut or seen as too expensive for the item in question.
* **Familiarity** with how a sending service works, which helped to build up trust in a service provider for those more uncertain about how to use it.
* Understandably, we encountered current service user concern for **personal** **safety** when sending parcels. People took into account the personal interactions they would need to have when sending a parcel against their concerns about Covid-19 infection.

### 4.2.3 Users with access requirements particularly needed parcel sending services to be accessible and familiar

As we have described, participants with access requirements lived with a very wide range of physical or mental health conditions. How that interacted with their parcel service needs depended on their location and access to services either locally or via public or private transport, plus how much support they received from family and friends.

In general, users with access requirements were most concerned with how their condition impacted their ability to send their parcel safely. This centred on:

* **Accessibility**: users living with health conditions needed to be able to access the locations at which they would send parcels. There were concerns about being able to carry heavy parcels to or from Post Offices or drop-off points, about whether the building would be accessible when they arrived and about how long they may have to queue.

“I struggle so much [when sending] because of the lack of up-to-date accessibility information. The services for normal people are great, but physically, there are such large barriers in place.”

(Participant with access requirements, Wales)

Accessibility concerns also included issues raised by users who were less digitally literate feeling that they could not access all available sending services or did not feel confident doing so. This particularly affected service users trying to return online purchases when they previously might have done so in person, which often requires either printing or QR codes.

“I returned some clothing to a high street store, you normally have the return slip, now you have to download and print it out, or use a QR code.”

(Rural participant, England)

* **Familiarity** – whatever the access requirement of the participant, they were happier to deal with a Post Office or drop-off point when they knew what and who to expect when sending a parcel. This was especially important for users who felt anxious when leaving their home. Some participants preferred sending services that removed the need for face-to-face interaction.

Those with anxiety also described a need for **certainty** and reassurance that their parcel would be sent and arrive within the timeframe expected.

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| ***Case study: Natalie, has access requirements***  Natalie suffers from anxiety and depression. She finds it difficult to go to the shops in person as she can have anxiety attacks when interacting with other people.  When she has to return an item bought online to a retailer, she needs the experience to be as predictable as possible. This means being familiar with the process for re-packaging the item appropriately and adding a return label that will be accepted by the Post Office. It also means feeling confident that it will be delivered within a reasonable timeframe to the retailer so that there are no issues with her receiving a refund. In both cases she worries that unexpected costs will increase her anxiety. |

Finally, this service user group was more likely than others to raise concerns about **personal safety** when sending parcels, due to the presence of ‘clinically vulnerable’ participants, who wanted Post Offices and other sending services to limit the number of people present, and to enforce social distancing rules.

### 4.2.4 Rural participants wanted a choice of reliable sending services nearby

The needs of parcel users in rural areas were common to all service users but often heightened by their distance from services. For example:

* **Certainty** really mattered to rural residents. They required assurance on sending a parcel that it would arrive within a reasonable timeframe despite where they were sending it from. This mattered if it needed to reach a friend or family member on a particular date or when returning an online order to get a prompt refund. This was also vital to micro businesses or marketplace sellers in rural areas to sustain their reputation.
* Similarly, participants needed **reliability:** to know that parcels would reach their destination and in good condition regardless of how far away they were from the recipient.

Additionally, participants voiced a need for:

* **Service coverage**: this could either mean having drop-off points and/or Post Offices within a reasonable distance or being able to send or receive parcels from home without paying a premium for the service. The growth of online shopping during the pandemic had led rural participants to be more aware of the limited courier collection services available in their area.

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| ***Case study: Martin, deep rural micro business owner***  Martin lives on a Scottish island and manages a distillery.  Martin relies on his Post Office to send bottles of alcohol from the distillery to his customers (usually around five a day). Despite most customers understanding that the delivery times will be longer as they are coming from a remote island, increased expectations around fast deliveries have meant that Martin requires certainty that his parcels will arrive within seven to ten days.  *You can read Martin’s full story on* [*page 60*](#_4._Martin,_Scottish) |

### 4.2.5 Micro business owners needed to provide the best parcel service for their customers at an affordable price for their business

Micro business owners in the study tended to have previous experience of despatching parcels to customers but their reliance on parcel services for their business’ survival had become crucial during the pandemic.

“[Sending parcels] is really important because I’m an online shop. So without having a delivery service, I couldn’t be in business.”

(Micro business owner, England)

“I’ve been sending more parcels than normal as a result of the pandemic, and because more people have been cycling [and ordering cycling clothes] I go to the Post Office every day to send 10-15 parcels.”

(Micro business owner, Wales)

**Reliability** was a need for all research participants, but micro business owners and those earning an income through marketplace sales were the most concerned about knowing a parcel would arrive and be in good condition. Their customers’ satisfaction and their company reputation depended on their ability to fulfil orders and facilitate easy returns when they say they will. This was their single most important criteria when choosing a parcel delivery company. Related to this, some micro business owners expressed a strong need for an **option for urgency** if they wanted to be able to provide a fast delivery service to their customers.

Other needs when sending parcels included:

* **Certainty**: Participants sending high value or perishable items required certain knowledge of when the parcel would arrive. If goods were lost or perished in transit, this could lead to customers seeking refunds from the micro business, even if the delay was the fault of the carrier.
* To achieve certainty and reliability, micro business owners were the most concerned of all service user groups about having an **option for tracking** when sending parcels. Knowing exactly where the parcel was had become business critical to participants who wanted to assure their customers that the parcel was safe and would arrive shortly.

“For everything I send through the business now, it’s always tracked. Because there are a lot of people who say they never got that. It’s worth paying the extra for it. It adds a bit of extra pounds to the shipping, but it’s cheaper than the cost of people saying they didn’t get it, especially on higher-value items.”

(Micro business owner, Northern Ireland)

“[Parcel service company] give you a text in the morning or an email, saying your parcel is coming between 8:38 and 9:38, and it’s so nice to know when it’s going to come. I love using them if I am sending customer orders.”

(Micro business owner with access requirements, England)

Although common to all of the service user groups in this study, particularly in the context of the pandemic, a prominent need for micro business owners (and marketplace sellers) was:

* **Affordability**: micro businesses were concerned not to have to pass on significant costs to their customer or to be penalised with charges relating to where they or their customers are located. Some were looking for consistency of pricing for UK deliveries, either to be able to cost their products more easily, or as something to offer their customers. Even if location was not an issue, they were more likely than other groups to pay attention to the weight of parcels to find the best service, noticing the thresholds at which they needed to change provider.

“I try to keep prices low on eBay, and under 1kg is £2.90 [with chosen courier]. 1-2kg it jumps right up, so then I tend to use Royal Mail for heavier items […] I start with [courier], then Royal Mail, then [courier] again [for the heaviest items].”

(Micro business owner, England)

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| ***Case study: Ellie, micro business owner***  Ellie is a homeware and antique seller relying on various online marketplaces to sell her products.  Due to the nature of online marketplaces, Ellie relies heavily on reviews and ratings to ensure she is a trusted seller. A large proportion of the reviews focus on delivery. She therefore wants to ensure deliveries are affordable, fast, reliable and arrive safely with the customer. Ellie sells a range of medium to low value products, and therefore cannot afford to pay a large fee for delivery, particularly now that customers expect low or non-existent added delivery costs.  *You can read Ellie’s full story on* [*page 64*](#_8._Ellie,_Staffordshire,) |

* **Service coverage** needs were expressed by micro business owners in terms of consistency of handling policies. They wanted to easily compare which parcel service providers would take which types of goods. Rural micro businesses also required the service to be available in their geographical area without them having to travel too far to reach it. Sometimes there was also a need for services covering their area or type of goods to be affordable.

## 4.3 Needs for receiving parcels

### 4.3.1 Summary of most important receiving needs for each service user group

We summarise the main needs when receiving parcels in the table below:

|  |  |  |
| --- | --- | --- |
| **Service users with access requirements** | **Rural service users** | **Micro businesses** |
| Communication  Reliability  Accessibility  Personal Safety  Certainty  Familiarity | Communication  Tracking  Reliability  Service coverage  Affordability | Reliability  Affordability  Certainty |

### 4.3.2 The pandemic made reliability and affordability when receiving parcels more important, but flexibility became less important

As with sending parcels, the pandemic had impacted on the needs of parcel service users when receiving parcels, whether they were a private service user or micro business owner. Again:

* **Reliability** had become more important, given people were ordering more items to meet day-to-day needs or to ensure their business survived. People were relying on parcel services to deliver items to help with personal wellbeing when they were unable to engage in their usual leisure activities, which made parcels play a more important role in day-to-day life than they had previously.

“We’re very lucky with our postman Jean, we rely a lot on them… and we’re ordering a lot more by mail now the shops are closed – things like clothes and shoes and fishing gear.”

(AR, Northern Ireland)

* **Affordability** featured for participants who were regular online shoppers and were taking delivery charges into account when choosing retailers or online marketplaces. It was also a concern for some service users in deep rural areas where surcharges were commonly applied to non-Royal Mail deliveries. Whereas previous research indicated affordability was only a consideration when sending parcels, participants in this study were interested in this when receiving parcels as well. They needed both overall affordability as well as reassurance about whether or not delivery costs were reasonable.

“If you buy a bigger quantity, it can be free delivery. For example, from £4.50 to £6.50. But only on some suppliers, or it depends, if I’m doing personal online shopping, I then spend more to get free delivery.”

(MB, Northern Ireland)

A need that was *less* important to participants at the time of fieldwork was **flexibility**. With fieldwork conducted during the third national lockdown across the UK, people had rarely been encountering difficulties receiving parcels at a convenient time or place given the amount of time they were spending at home.

“I have had some bad instances in the past where they’ve missed me, but that isn’t happening as much anymore as we’re all at home more.”

(Rural participant, Wales)

We also heard less than we might have expected during pre-pandemic times about **certainty** to deliver within very specific or **urgent** time slots to fit around other commitments.

“It just said ‘we’ll be there tomorrow’. You should have been able to choose a time but there was no choice. I work from home so that was fine.”

(Participant with access requirements, England)

“As I’m working from home at the moment, it’s fine waiting for the delivery driver to come. You don’t have to fit it into your schedule.”

(Micro business owner with access requirements, England)

However, while urgency was generally less important in the pandemic context, there were exceptions to this. For example, when a participant felt they urgently needed an item that would be harder to find considering rules on non-essential shops. In other ways, service users now had higher expectations that options for urgency would be available, as some were now more used to free or low-cost next-day delivery services being provided by online retailers.

“There was no charge because I have [subscription to free next-day delivery service], I reckon I save money [by subscribing].”

(Participant with access requirements, England)

Similarly, the provision of **tracking** services by an increasing number of delivery companies has made this need on the one hand become stronger, with more service users expecting they will be able to find out the current status of their parcel if they are concerned about its location and have an option to choose a specific delivery slot. On the other hand, tracking has not been as relevant during the pandemic as many were at home more often, and therefore assumed they would be in when the parcel arrived, wherever its current location.

In this respect, parcel users also expected receiving parcels to be fairly **simple**, and to require little effort on their part. Whereas previous research identified simplicity as a need for receiving services to be predictable with comprehensible pricing, there was evidence in this research of needing other kinds of simplicity, such as simple purchase processes, and not having any problems when the parcel itself is delivered.

This research also revealed some new needs not identified in the previous research:

* **Communication**. This meant being able to contact a delivery service about requirements for the delivery, whether these were access requirements or to provide instructions about the nature of the property.
* **Accessibility** when receiving parcels. This meant being able to physically access any parcels delivered to an address, as well as having offline access to digital services such as tracking.
* **Familiarity** with delivery staff and how a delivery service works, which helped to build up trust in a service provider for those concerned about answering their door to someone they do not know.
* **Service coverage.** Participants needed to have a service provider who could deliver the parcels they were interested in to their address.

“We’re now utterly reliant on delivery services to access anything as we would otherwise be limited to what the [local shop] supplies.”

(Deep rural participant, Scotland)

* Again, there was concern for **personal** **safety** when receiving parcels. Participants needed delivery drivers to observe social distancing and wear masks if they needed to be closer to the parcel recipient (e.g. to help bring a large item indoors).

### 4.3.3 Users with access requirements had been even more likely to rely on receiving parcels during the pandemic as many had been shielding

Users with access requirements had been increasingly using parcel services to receive day to day items because they were shielding or concerned about going to the shops. They were relying on parcels heavily both for essential needs and their wellbeing through the pandemic. The frequency of receiving parcels, including both positive and negative experiences, had therefore risen over the last year.

“We are almost totally reliant on deliveries now […] We are receiving more parcels because we are doing virtually all of our purchases online. We don’t go into crowded areas or supermarkets. Everything we need comes in through courier or post.”

(Rural participant with access requirements, England)

Users with access requirements had a set of needs that, although not new, had risen in importance as they relied heavily on receiving parcels through the pandemic. This included:

* **Accessibility**: users who struggled to lift heavy parcels expressed a need for assistance bringing parcels inside upon delivery. They did not feel it was fair to have to pay an additional fee for this, but would like it to be part of the service.

“I would prefer if delivery drivers could call you to let you know when they’re there and wait until I get to the door so I can ask for additional support bringing the parcel in if its heavy.”

(Participant with access requirements, England)

* Enhanced **reliability:** participants who were not able to answer their door promptly, whether due to physical limitations or anxiety about contact, needed to trust delivery companies to leave the parcels in a safe place where it would not be damaged or stolen. Although not getting to the door in time had been a more frustrating experience prior to the pandemic, as it would mean missing the delivery, it could still be a problem when recipients did not want their parcel left exposed or were unable to carry it inside.
* **Familiarity** was as important to this group when it came to receiving parcels as it was when sending them.
  + Participants tended to prefer a familiar delivery worker who had got to know their needs so they did not have to restate them or put notices on the door.
  + For those with mental health problems, having a familiar, consistent service – e.g. the same delivery driver and/or low face-to-face contact – was important.
  + Some who felt their age, health condition or disability could leave them ‘vulnerable’ to strangers thought familiarity was an important way of building trust with parcel services.

“Cost didn’t factor in, I just wanted it to get there. It was a present for my nan. She has dementia; she can worry if strange people come to the door so I knew someone with a Royal Mail uniform would be better than someone without a uniform – she would be less likely to open the door. I knew she’d be comfortable with Royal Mail.”

(Participant with access requirements, England)

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| ***Case study: Julia, has access requirements***  Julia has an undiagnosed physical condition which causes her mobility issues, especially when walking.  Due to the barriers faced when going to the shops in person, Julia relies on deliveries to access most products. However, Julia struggles to answer her door quickly due to her health. She has a preference towards Royal Mail as she is familiar with the postman and he is aware of her additional needs.  *You can read Julia’s full story on* [*page 57*](#_1._Julia,_27,) |

A need that underpinned many of these requirements was that of:

* Good **communication**: participants expressed different ideas about how they wanted the driver to be aware of their parcel delivery needs. This may be through direct contact or centrally held information by the delivery companies, through specifying a health condition or through simply stating what their access requirement was. Some were concerned that revealing a disability or health condition might expose their ‘vulnerability’ and increase the risk that a stranger could take advantage of them (such as a participant with a visual impairment concerned about an increased risk of theft). But the underlying theme was wanting a service where it was easy to get in touch about their needs if they wished to.

“I want to share my needs and preferences, such as leaving the parcel in a safe space and no contact, and have those options saved so I don’t have to disclose my requirements and impairments every time I order something.”

(Participant with access requirements, England)

“I think they should have something for people with disabilities asking them to help bring it inside or having no contact deliveries. It should have something in the order that says you need assistance.”

(Participant with access requirements, England)

The pandemic also created a distinct need around **personal safety** for this group who were more likely to include ‘clinically vulnerable’ individuals, meaning they wanted delivery drivers to socially distance and wear protective masks.

Finally, as with sending, **certainty** was important to participants with anxiety that could be worsened by uncertainty around a parcel’s arrival, and to those with health conditions which require careful organisation of their day (e.g. medical appointments).

### 4.3.4 Rural participants needed to know that their parcel would reliably arrive at their home no matter how remote their location

Residents in rural and deep rural areas were already very used to relying on parcel services for shopping and staying connected.

“We’re utterly reliant on that (postal) service as it is difficult to access much on the island – only what the Co-op supplies. Otherwise you have to take a boat or a plane to a nearby town to buy it.”

(Deep rural participant, Scotland)

“Because of where I live, I need to make a day out of going to the shops, so I do rely heavily on the postal service.”

(Rural participant, Wales)

As with all service users, the need for **reliability** had increased during the pandemic. Participants, particularly in deep rural areas, wanted to be sure that parcels they were relying on for day-to-day needs, would arrive in good condition and ready to use.

Although **certainty** did not feature as much in this study because so many participants were staying home, it remained somewhat important to rural residents. Although a parcel might not need urgent delivery, they wanted to know it would arrive within a reasonable timeframe; some assumed that living in an area with more limited service coverage meant that parcels might take longer to arrive with them compared to non-rural users.

Other needs of rural residents were:

* **Option for tracking**: rural service users particularly valued tracking updates, whether by text or logging in to online information. They wanted to know exactly when the parcel would arrive so they could definitely be in and not risk having to travel to a distant Post Office or collection point to pick it up. They also wanted to be able to look up where a parcel had got to if it was delayed.

“I didn’t track it but could have if I wanted […] Only if not there after a week. It’s useful, when something doesn’t arrive.”

(Rural participant, Northern Ireland)

* **Communication**: many described living at an address that was harder to find than homes in an urban or suburban area, creating a need to be able to communicate with delivery companies about how to locate this (e.g. instead of assuming a satnav will locate the address). This was seen as particularly important for drivers who are unfamiliar with the resident’s area.
* **Affordability**: for participants living in areas where surcharges were commonly applied when receiving parcels, such as in deep rural Scotland and Northern Ireland, their ability to access or purchase items was curtailed by additional, and what they perceived to be prohibitive, costs.

“On Saturday night I was looking for a print and when I got to delivery, it said “rural” and wanted £17 – so I closed the screen down. No choices even to have it slower – the print itself was only £22.”

(Rural participant, Northern Ireland)

As with sending parcels, residents in rural areas were concerned about **service coverage** when ordering items for delivery. Unlike service users in more built-up areas they did not necessarily have click and collect alternatives if a courier did not deliver to their area or the item was prohibited (e.g. because parcels could only be delivered by air to someone living on a Scottish island and contained a restricted item).

### 4.3.5 Micro business owners needed to be able to receive supplies or process returns with reliability, certainty and affordability

Micro business owners either needed to receive parcels as supplies for their business or to process returns from customers promptly. They usually operated their business from home, so many of the experiences they discussed were common to both business related and personal deliveries. But the significance of receiving parcels was heightened as a result of the impact on their business or seller reputation.

As with sending parcels, they were primarily looking for **reliability** and **certainty.** But, again, **affordability** was a more important issue, particularly if the location of the business could affect delivery costs. Micro business owners reported surprise costs when they had made a commitment to a customer to deliver a certain product in the expectation that they would be able to get supplies delivered cheaply, but then found that their usual delivery method was unavailable for the particular item needed to make the product.

“The most efficient delivery system seems to be from [retailer A] to me via Royal Mail unless I’m desperate for an ingredient, which sometimes you can’t get from [retailer A]. Then I will go to [retailer B] and pay the £15 delivery, but only if I had made a commitment to make [the product].”

(Deep rural micro business owner, Scotland)

“I did use the collection service for a while at start of lockdown but that’s an extra 70p for each parcel – even if I’m sending four parcels at the same time – that would knock down my eBay rating.”

(Rural micro business owner, England)

# 5. Experiences of sending parcels

In this section we examine how the experience of sending parcels met the needs of the different target service user groups in this study and identify any pain points in the service received. Where services fell short of user needs, we explore what choices and constraints our participants experienced in the parcel services market.

## 5.1 Experiences common to all service user groups

Everyone in the study had sent more parcels in recent months because of lockdown restrictions, whether gifts to friends and family or online shopping returns. Some of the experiences were common to all of the target service user groups, reflecting the shared nature of Covid-19 restrictions.

### 5.1.1 Participants overall felt neutral or positively about parcel sending services

Many participants described themselves as being broadly satisfied with parcel sending services.

* Post Offices that weren’t too busy and that were located near participants were appreciated for maximising simplicity.
* A few described enjoying going to the Post Office and interacting with staff and customers as part of everyday life in their local area.

“I like going to the Post Office and seeing people there to talk to. I love talking to people.”

(Rural participant with access requirements, Wales)

* Parcels were described as tending to arrive at their destination in an acceptable timeframe and in good condition.

“I think they are pretty good overall. They don’t put any obvious obstacles in the way of returning stuff. There seems to be a good delivery period and a good all-round service I have to say in fairness.”

(Participant with access requirements, England)

However, while there can be an intrinsic positivity associated with sending parcels – particularly to friends and family – sending parcels was not generally seen as something to look forward to. Some described the activity of handing a parcel over to someone else to look after as requiring trust and ‘crossing your fingers’ that nothing will ‘go wrong’ – fears that a few admitted weren’t usually realised, but which were based on occasional experiences of a parcel arriving late or going missing.

“[You] hand it in over the counter and you have some relative belief that they're going to take it from you and look after it.”

(Micro business owner, England)

Among others, who send a higher volume of items more often, sending parcels is just another errand – not more or less stressful than other, similar tasks. This means the overall sending experience was not something which was front of mind, and people’s expectations were low, particularly when a parcel was not urgent or was a lower value item.

“Stuff’s got to go in the post, you get it there, you pay your money, hopefully you get a phone call a few days later saying they got it in the post. I don’t worry about it.”

(Participant with access requirements, England)

“I feel happy when sending parcels as I know it’s gone, I know it’s being tracked so I know where it is, the person who’s getting sent it can track it and I’m getting money for it.”

(Micro business owner with access requirements, England)

### 5.1.2 A big issue when sending parcels was concern around whether it would be safe and easy to do so during the pandemic

All types of participant raised concerns about their **safety.** They observed that Post Offices and other collection points had become busier since the pandemic and they weighed up whether it was safe and worthwhile standing in a queue to post an item.

This also connected to the need for **simplicity,** in the sense of ease and convenience, when sending parcels. With most more likely to be at home than pre-pandemic, a trip to send a parcel was now seen as not only higher risk, but also higher effort, and seen as more likely to take a while.

“I have not had a bad return experience but that’s because I don’t bother. I’ll plan to return it and wrap it up and then my health deteriorates, and I can’t post it, so I have to keep it anyway.”

(Participant with access requirements, England)

“Sometimes I just think it’s too much hassle [to return], often you have to go out and take it to a [collection service] place or local store, there aren’t many things – they bring it to you but they don’t come and collect it. I struggle with that so I end up keeping things.”

(Participant with access requirements, England)

Some participants reported cases where they had not returned low value online shopping items because of the perceived effort or risk.

In addition to other experiences of delays outlined in the individual service user group sections below, there were a few experiences of parcels going missing or arriving damaged (reducing **reliability**) as well as arriving very late (reducing **certainty**). As these issues were infrequent, they did not seem to be systematic or linked to a particular provider.

There was also frustration at the perceived difficulty of contacting providers about such issues due to busy call centres. In these scenarios, participants seemed to prioritise obtaining a refund from the courier over other kinds of redress (e.g. making a complaint).

“I decided to sell my kids’ bikes, it was before Christmas, and I put one on eBay, and sold one on collection only, and one via the postal system […] it went to the Plymouth hub, and I noticed it went to the national Northern hub which was weird since it was going to Kent, then after a couple of days it hadn’t moved. […] Their attitude was really disappointing. “Oh well, you know it’s just got lost. But don’t worry. […] I felt really bad, so I refunded the person straight away. Nobody lost out but I was really disappointed, that person has to find another bike before Christmas. I didn’t feel great about it. I’ve only used [provider] for small items since then.”

(Rural participant, England)

“I spent an hour on their chat, where I was 10th in their queue. And they must have just one person on, because it took an hour for me to get to the top of the queue.”

(Micro business owner, England)

### 5.1.3 Participants usually used the Post Office to send parcels, and so experienced little variation by parcel service provider

In general, participants reported little variation in sending experience by provider, but this was because of the **limited amount of choice** that was being exercised when sending parcels. Participants across all service user groups tended to go to the Post Office to send parcels via Royal Mail. While individual participants had experience of variation between Post Offices – for example, based on size, opening hours and staffing levels – they tended to use one service.

Few participants were aware of doorstep collection services to send parcels and those that were could be put off by the additional cost. Where it was available pre-paid for an online retail return, participants had to use the retailer’s courier.

### 5.1.4 Participants tended to use other parcel service providers if they were more frequent senders or were sending a particular type of parcel

Participants defaulted to using the Post Office to send parcels. Participants tended to use other providers if they were frequent parcel senders or had an exceptionally large, fragile or valuable item to send where it was worth their time to shop around.

The choice to use the Post Office was sometimes motivated by a community-oriented concern about wanting to keep this local service available.

“I prefer to go into my Post Office to keep them open. I can buy everything online, would be a bit cheaper, but that doesn’t keep my Post Office open. So there’s the ethical bit as well. I just buy the postage over the counter.”

(Micro business owner with access requirement, England)

With these patterns of sending behaviour firmly entrenched, participants did not usually feel that a negative experience would cause them to change provider for sending parcels; the few participants who talked about avoiding a provider after a bad experience did so in relation to a non-Royal Mail service. Many thought it was important to have a Post Office or collection point that was local or in another convenient location for them.

## 5.2 Sending experiences of users with access requirements

### 5.2.1 Post Offices and drop-off points were often difficult to access or use for users with access requirements

The clearest unmet need for this service user group when sending parcels was **accessibility**. Participants of this service user group reported finding Post Offices or drop-off points difficult to access and use.

First, they had to take into account how they would travel to the location and whether they could park nearby if travelling by car, something which those with mobility issues described as challenging.

Then, at the point of sending, they were not always confident that they could access the Post Office or other shop, move around comfortably and would not have to queue for a long time. Finally, some were concerned at the apparent lack of trained staff available to understand their condition, for example if it was an ‘invisible’ disability.

There were also **digital access issues**. Some participants described being unable to explore different options available to them by browsing online. Others described not being able to use tracking or being unable to print return labels at home.

“I try to stay on my scooter as much as possible so I wouldn’t have to stand. It’s very painful having to stand. I don’t know if my legs are going to give way. I just have to hope and pray that the person in front of me is quicker. It’s embarrassing to feel like that. I think there’s a little bit of stigma attached.”

(Participant with access requirements, England)

“The thing is, there are all these delivery firms and you have to contact them on the internet. I am completely computer illiterate. If I had options where I could ring up that would be good. […] Tracking – you need a computer for that.”

(Participant with access requirements, England)

The consequence for many was a reliance on family and friends to send a parcel on their behalf. This in turn meant that it was difficult to meet their need for **familiarity.** Unable to regularly access a Post Office, the lack of clear information about the Post Office or drop-off point made participants more reluctant to do this themselves.

“I don’t feel confident driving on my own in a new area. And when I get there, I can’t put my wheelchair together and go. There’s no information online on if there are lower desks, steps […] Often with accessibility information, it tells you what they do have, but it doesn’t include what they don’t have. So sometimes you’re just like ‘have they just neglected to put it on or is it just not there?’ […] Train companies are good with this but Post Offices aren’t.”

(Participant with access requirements, Wales)

Not surprisingly, participants in this segment of the sample were the most concerned service user group about **safety** when sending a parcel. Those who were shielding who had not taken up doorstep collection services tended to again rely on family and friends to take the parcel to the Post Office or drop-off point. Safety was also connected to the accessibility concerns highlighted above, with the potential for an inaccessible service to be physically unsafe (e.g. linked to a mobility issue).

### 5.2.2 Few users with access requirements had experiences of providers other than the Post Office

Nearly all participants with access requirements were sending parcels using the Post Office. Their experience might vary by which Post Office they used. Few had experiences of other providers and therefore they were not able to make comparisons between them.

### 5.2.3 Awareness of doorstep collection services was low and, if aware, some felt the charges were unfair

Awareness of doorstep collection services was low among some people who did not send parcels often.

“I wished the Post Office had a service where they collected parcels from you to send by coming to your home and picking them up.”

(Participant with access requirements, England)

Those aware of doorstep collections felt these were too expensive, even if in some cases they did not know the exact cost of the service. To them this suggested the service was not inclusive towards those with access requirements.

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| ***Case study: Brittany, has access requirements***  Brittany has a range of physical and mental health conditions which mean she is often in pain and tired, and she requires crutches or a wheelchair when leaving the house.  Brittany often finds issues with Post Offices being physically inaccessible as well as staff being inadequately trained to communicate with those who have mental health problems. Brittany has had numerous challenges trying to find accessibility information online, as it has been out of date or hard to find. As a result, Brittany looked into collection services to send parcels, but was frustrated to find a cost implication attached to this, which felt inappropriate for her circumstances.  “The door collections are great in practice, but it is clear that it is in light of Covid rather than with disabled people in mind, and price is a huge barrier here. It bugs me that I have to pay a premium [for collection services] because I can’t access the Post Office just because it happens to be in really strange building that is really narrow and [the counter] is the wrong height.”  *You can read Brittany’s full story on* [*page 58*](#_2._Brittany,_25,) |

## 5.3 Sending experiences of rural participants

### 5.3.1 Rural participants often had limited choices of nearby sending services, but tended to accept it as a fact of rural life

**Service coverage** was certainly an unmet need for rural residents given long travel times to a Post Office, drop-off point or even a post box for some. There were also frustrations among participants who felt the quality of service at their nearest Post Office was variable. But low service coverage was a challenge participants did tend to accept as part of their choice of location.

“In Inverness, I could pass three or four Post Offices on my way to work, whereas here there is only one which is five miles from [where I live].”

(Deep rural participant, Scotland)

Rural residents were adept at planning trips to nearby settlements to include a number of errands including sending a parcel. But some were now having to travel further after the closure of their nearest Post Office.

But even accepting these adaptations required for a rural life, service users in these areas were facing issues with the need for **certainty** to be able to send their parcel when they wanted and to ensure it arrived as planned. Rural Post Offices could be closed unexpectedly or operate shorter hours due to staff shortages, causing inconvenience and delays.

“The clothing return I made last week I went to the Post Office three times and the third time it was open. Luckily [the return] didn’t have a timescale, if it did, I’d have had to drive to town four/five miles away. Often, I drive by to check if it’s open. It’s okay driving four miles but it’s driving eight and it all adds to the cost of the postage. Once you live in the countryside, you have to factor in that every time you go out you take the car.”

(Rural participant, England)

Rural residents were also experiencing delays sending parcels given growing demand on fewer Post Offices pre-dating the pandemic. Participants talked of long queues and difficulties parking near the Post Office (especially if they were also in the access requirement sample and had mobility needs). Participants were taking these factors into account in deciding if it was ‘worth’ sending a parcel.

“I had to queue for a long time – it was bad before Covid even. There was only one person doing the shop and Post Office, so it’s overwhelming for them especially at peak time. You can be waiting 45 minutes to an hour!”

(Rural participant, Wales)

### 5.3.2 Most rural residents sent parcels through the Post Office

As with participants who had access requirements, few rural residents sent parcels using services other than Royal Mail. The variation they experienced was therefore in which branch of the Post Office they used rather than the delivery company.

### 5.3.3 Of all service user groups, rural participants had the least amount of choice when sending parcels

Rural residents were the least able of the target service user groups to exercise choice when sending parcels. Drop-off points and Post Offices might be long distances away and doorstep collection services available in more densely populated areas were not commonly found. These participants did tend to accept this as a consequence of living in a remote area but were consequently highly reliant on a single Post Office and could not choose to go elsewhere if it was not easy to park or if they received poor service.

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| ***Case study: Rupert, rural participant***  Rupert lives in a small village ten miles outside of Belfast. He sells CDs and trinkets on online marketplaces. He sends these items using Royal Mail by going to his local Post Office which is a few miles away – he is unaware of other providers.  Rupert thinks Royal Mail provide an efficient and affordable service for his marketplace selling as his parcels are often small, light and low value. As a seller, Rupert often gets asked by his customers about their orders and when they will arrive so Rupert always pays for tracking services, though he feels this should be made standard.  *You can read Rupert’s full story on* [*page 62*](#_6._Ryan,_Northern) |

## 5.4 Sending experiences of micro business owners

### 5.4.1 Rare occasions where parcels were not delivered to customers as expected had serious implications for micro businesses

Micro businesses said that in most cases their parcels were delivered on time and in a good condition. However, on the occasions this did not happen, it could have significant consequences for their business. For example, when a parcel was lost, a business might incur costs upon resending an item. When a parcel went missing or was late, they also felt it was important to refund their customers promptly as a gesture of goodwill. They therefore prioritised arranging refunds (for the goods and/or the postage) before seeking to recover costs from the delivery company. But sometimes it was difficult to receive compensation due to disputes about liability. **Reliability** was sometimes an unmet need as a result.

“Recently someone ordered three boxes and wanted a tracked 24-hour delivery. The postage goes up, so it was going to cost her £13 […] via Hermes they got there in two days – she was fine with it but it was late […] I refunded the entire postage.”

(Micro business owner, England)

The **option for tracking** posed a specific risk to micro business owners when the tracking functionality did not work. Users reported damage to their reputation if they could not confirm to their customer exactly when the parcel would arrive (and sometimes incurring the costs noted above).

Although a priority for micro business owners, **affordability** needs were not always being met because users were confused about pricing structures across providers. They did not always feel they could work out the cheapest way to send a parcel due to the different weight bands used by providers. In addition, they found it hard to keep up with current pricing in terms of the range of providers available and any changes made to pricing.

There was confusion among participants about what they could export and how much it might cost them in duties and delivery charges.[[17]](#footnote-18) This could have an impact on their perception of the affordability of postal services. They were not clear where to find guidance for their circumstances and some no longer felt confident fulfilling orders to customers resident in EU countries.

“There’s a large increase in complaints – they have to pay custom fees to the delivery supplier and there’s nothing we can do about that. […] Before the turn of the year, it was just about putting it in a box, addressing, it paid postage and it went in. Now what we’ve got to do is fill out the customs declaration and come July we have to work out how to pay VAT in 28 different countries – a different world to us […] The bits that were unpleasant [in our business are] becoming infinitely more hard – it’s making us consider if want to continue – and that’s at the end of our best year in 20 years.”

(Micro business owner with access requirements, England)

Inconsistency of **service coverage** could also cause problems for micro business’ ability to fulfil customer orders.

“The plan was to use [parcel service company] because they give you a one-hour delivery slot […] So we packaged up our parcel and everything and we went through the system and it said, ‘have you checked our prohibited list?’ and almost everything in this world is on the prohibited list […] There was such an extensive list of things, that I couldn’t send what I wanted to the customer.”

(Micro business owner with access requirements, England)

### 5.4.2 Micro business owners were most likely to use alternative sending services, but there was no consensus of opinion on other providers

Micro business owners and frequent marketplace sellers were more likely than other service users to use parcel service providers outside of Royal Mail. However, there were no consistently reported variations in service by provider across the sample, with most providers mentioned in the study being described variously in a positive or negative light by different participants.

### 5.4.3 To get the best price for their business, micro business owners considered their choice of providers most carefully

Although as noted above there was some confusion around how to identify the best price, micro business owners and frequent marketplace sellers were nevertheless the most likely service user group to be informed about the price thresholds at which one provider was more competitive than others. Some would therefore use different providers depending on the parcel they needed to send.

“Royal Mail are cheaper for small things, it was a small/light package. So there was no point paying a [bigger] fee for it. [With other couriers] would have been closer to a tenner.”

(Rural micro business owner, Northern Ireland)

“We really wanted to do it next day, but the next-day was £18 with [courier A], and would cost me just under £11 with [courier B].”

(Micro business owner, England)

## 5.5 Summary of most commonly unmet needs when sending parcels

These issues indicate that **across all service user groups**, the most commonly unmet needs were:

* **Reliability**: There were occasional issues with parcels getting lost or damaged. While participants tended to seek refunds, there was frustration that the delivery did not succeed as planned.
* **Affordability**: Service users sometimes experienced unexpected costs when sending.
* **Personal safety**: There was discomfort with using Post Offices to send parcels during the pandemic.

For service users with access requirements, the issues in this research suggest parcel services could do more when it comes to:

* **Accessibility**: Post Offices and online services for sending parcels could not always be accessed.
* **Personal safety**: This service user group felt particularly at risk when using a Post Office or other in-person delivery service.

The main gap for rural service users was:

* **Service coverage**: Rural participants felt they should be able to access a wider range of providers without having to travel too far or pay more.

Micro businesses felt they could have been served better in terms of:

* **Reliability**: EU Exit issues meant some micro businesses were not confident about being able to send parcels to customers at the time of the research.
* **Affordability**: This need wasn’t fully met when micro businesses struggled to navigate pricing structures, faced additional costs linked to failed deliveries, or found there were new costs associated with sending after the end of the EU Exit transition period.
* **Certainty**: Some micro businesses had experienced products not being delivered to customers in the expected timeframe.

# 6. Experiences of receiving parcels

In this section we examine how the experience of receiving parcels met the needs of the different target service user groups in this study and identify any pain points in the service received. Where services fell short of user needs, we explore what choices and constraints our participants experienced in the parcel services market.

## 6.1 Experiences common to all service user groups

### 6.1.1 Participants felt highly satisfied with their experiences receiving parcels

Across service user groups, experiences of parcel receipt were generally positive, with high participant satisfaction. Participants felt that they are usually offered a good service when receiving parcels:

* Items generally arriving when expected (and sometimes earlier).
* Delivery options mostly adequate for the expected item (though not always for specific needs).
* Relationships with the regular Royal Mail postman or woman are usually very good (especially in rural areas).
* Items very rarely get lost at any stage of the delivery process.
* Delivery options were seen as mostly adequate for the expected item (though not always for specific needs).

All types of service users were impressed with how parcel service delivery companies, and particularly drivers, had managed to meet the increased demand for parcel services during the pandemic and maintain **reliability**. This includes increased frequency of services to areas that might have previously been poorly served, and a perceived improvement in services. In other cases, participants described being more willing to overlook a ‘hiccup’ in their experience given the pressure postal services were under.

“During coronavirus they have been doing a good job, doing deliveries in the middle of the pandemic.”

(Participant with access requirements, Northern Ireland)

“I have noticed delivery has got better – there are more people ordering so it’s got better.”

(Rural participant with access requirements, England)

As has been mentioned, issues arising from not being in when a parcel is delivered were not raised to the same degree as in the previous research for Ofcom given the restriction on movement at the time of fieldwork.

“We haven’t missed any parcels, that’s been really good, partly that’s because we’re in [...] Someone would leave a card saying we missed you, and we’d have to […] go to Post Office three to four miles away in the car, but now they’re just outside the door.”

(Rural participant, England)

Across all groups, most participants reported positive experiences with parcels being left/photographed on their doorstep rather than having to sign on receipt. But this was not a universal sentiment. Participants who still had commitments away from home did not always welcome these changes and raised concerns about the risks of leaving parcels that were not signed for. Some participants (across all research service user groups) also regretted that they now had less personal contact with delivery drivers.

### 6.1.2 Although there were negative experiences, few participants felt it necessary to take further action if they received their parcel in the end

Negative experiences that were not specific to a target service user group tended to reflect day to day service user pain points that could occur to any user of parcel services. This ranged from delays, to drivers not following instructions, to leaving items at the wrong address or leaving items outside without users being aware.

Provided that a parcel arrived in good condition, few described it as necessary to take further action after experiencing a problem; those who did usually sought a refund for an item via the retailer. Only a very small minority described making a complaint to a parcel carrier. Those who said they were reluctant to make a complaint described not wanting to cause a problem for a specific delivery driver, or thought that it was not worth the effort.

“Last year I bought a new American fridge freezer, one of the options was ‘for an extra £15 we’ll install it for you and you pay a little bit extra’ […] They didn’t check the legs were level, they just turned it on to check it worked. They didn’t tell me where the instructions were. It was ridiculous. I didn’t complain because I couldn’t be bothered, I shan’t bother using them again. I thought that was bad service.”

(Participant with access requirements, England)

“The pallet included a ton of compost. It was in a bag for life but giant. It was in a huge lorry which had a lift attachment. He was in a real state trying to manoeuvre it. […] The delivery driver managed to manoeuvre it about. He then asked me to steady it while he manoeuvred it and I had to help him. It wasn’t hard but I had to get close to him and he didn’t have a mask on. It was obviously a two-man job. I didn’t want to complain as I didn’t want to get him in trouble. It wasn’t painful as such, but it was uncomfortable as I had to stand for a while and it might impact me in the future. It could have harmed me if it toppled.”

(Participant with access requirements, Wales)

We discuss how these issues impacted on each of the target service user groups in the subsequent sections.

### 6.1.3 General opinions on different providers were often based on specific experiences

Across all the target service user groups, perceptions of parcel delivery companies for receiving parcels were generally neutral or positive. Participants were most familiar with Royal Mail and Amazon Prime services but also discussed services from other providers such as Hermes, DPD, Yodel and UPS.

Perceptions were partly driven by the **in-person experience with the parcel service** delivering their parcel. As with Ofcom’s previous research, participants talked about the value of their familiarity with the local postman or postwoman, the local customer knowledge they had built up and the permanent nature of their job. But there were examples, especially given the volume of parcels received in the last year, of positive experiences where there was continuity of couriers delivering for other companies, meeting a need for **familiarity**.

“I like the Royal Mail, maybe because I’m old. If I had the choice, that’s what I might choose. Although price might come into it. Some other companies use vans with names on them, others are just white vans, probably zero hours and all that. I think there’s more care taken with Royal Mail.”

(Rural participant with access requirements, England)

“The local [delivery company couriers] are husband and wife and quite often they bring out parcels […] You could talk to him and he would know where to leave parcels.”

(Rural participant with access requirements, Wales)

Other experiences participants felt they were more likely to encounter with some providers than others were the regularity of Royal Mail’s deliveries, meeting a need for **reliability**, or the **speed** with which some online shopping orders were fulfilled, even if they hadn’t considered it an urgent delivery.

The more frequent use of parcel delivery services had made all service users more aware of features offered by some couriers such as one-hour delivery slots or online tracking and text updates. They were also more aware of retailers who offered free next-day delivery meeting a general **affordability** need and a need for urgency. Service users may become more likely to expect these as standard when ordering online.

### 6.1.4 Participants did not want - or felt they could not - choose their delivery provider

We did not find evidence of many participants exercising or seeking choice in who delivered parcels to them. For business-to-consumer deliveries, participants were not choosing a particular retailer because of the parcel service they used, although some would be put off by delivery charges that seemed to represent additional fees, and shop around. For consumer-sent deliveries, participants did not expect to influence which company a friend or family member chose to send them a parcel.

Negative experiences with a particular delivery did not generally lead to a service user avoiding that delivery company in future. This seemed to be because when shopping online, the delivery company was not top of mind or noticed during the purchase. There could also be confusion as to who was responsible for a problem (retailer or parcel service): some reported being sent back and forth between the two when following up on a lost or late parcel. Only after exceptionally poor service did some participants report that they tried to avoid that company for future orders.

Positive experiences, however, did help few participants identify a preferred parcel service provider when they were able to exercise choice (for example, if they could see multiple providers to choose from when making an online retail purchase).

## 6.2 Receiving experiences of service users with access requirements

### 6.2.1 Participants with access requirements had generally good experiences of receiving parcels, especially from familiar delivery workers

Experiences of receiving parcels were generally positive among this group. The best experiences met the **familiarity** need described earlier. In these cases, participants had developed informal arrangements with couriers or postal workers to help them receive their parcels, whether helping them take in heavy items or leaving the parcel in a safe place for them. In turn this enhanced the **reliability** of the service knowing that their parcel would reach them safely.

Although generally service users in the previous study were looking for **flexibility** in where and when they could collect their parcel if they were not home, participants in this target group appreciated when parcel delivery companies took note of the flexibility they required at the point of delivery to account for their needs. This could include assistance with heavy items or respecting their wish for contactless delivery. When a company got it right it created a lasting positive impression on service users.

“I think if they’re aware of [my needs] they go above and beyond. They’re not always aware but sometimes you can put a message to the driver, for example, when it’s something heavy. The fact that they listen to the notice on my door that I’m shielding I really appreciate.”

(Participant with access requirements, England)

Participants in this group were understandably most concerned about **safety** when receiving parcels. They tended to report that delivery drivers were following Covid-19 safety guidelines correctly. However, participants with the greatest concerns, often because they were shielding, would go to extra lengths such as disinfecting parcels before touching them.

### 6.2.2 Negative experiences were often a result of a lack of communication about participants’ access requirements

Where there was a lack of **good communication**, participants were at risk of not receiving parcels **reliably**. This happened when drivers did not comply with delivery instructions regarding a safe space or neighbour with whom to leave a parcel. Parcels were left outside – exposed to the elements – that could contain essential items for managing a condition, or with a neighbour they did not trust, inducing anxiety. Some participants noted this happened more during the pandemic, when drivers were more likely to be leaving items outside a property after ringing a doorbell, and did not always wait to see a recipient collect the item (which for some with access requirements, took them longer to do).

“We try to set up a default instruction to leave the parcel in the porch if its unlocked or leave with one of the neighbours who tend not to be out. However, those instructions are not always followed – it’s sometimes propped against the door and sometimes taken away altogether.”

(Micro business owner with access requirements, England)

This could lead to negative **accessibility** experiences, for example when receiving large and heavy items. Participants who were unable to lift their items could be left on their own facing an impossible task to take in the delivery. Such issues were exacerbated by the trend towards ringing the doorbell and leaving the parcel on the doorstep. Participants wanted consistent ways to notify parcel service providers that they needed additional assistance at the point of ordering online shopping.

“I wasn’t able to select any specific options. It would be good if they had something for people with disabilities that says you [need] assistance.”

(Participant with access requirements, England)

**Digital accessibility** was also more likely to be an issue for some participants in this service user group. This was exacerbated if the participant also lived in a deeply rural area with limited connectivity. Participants felt that service improvements since the pandemic had focussed on online customers. Those who were less digitally able could not take advantage of features such as parcel tracking apps or online postage payment. They saw little prospect of companies addressing this need in the future.

“I just wish the companies would make it easier to do stuff over the phone. Everything I order is over the phone. There are companies that you can only get hold of over the internet. I don’t shop with them. There’s this thing the Post Office is doing, an extra 75p or something to come and pick your parcel up at home, but from what I understand it’s all going to be done on the internet. I’m not the only person, the sort of person who wants to use this service tends to be more computer illiterate.”

(Participant with access requirements, England)

### 6.2.3 Participants with access requirements noticed variation between services in catering for their specific needs

Participants with access needs encountered inconsistency of service options across delivery companies, which restricted their ability to manage their parcel receipt successfully.

Participants felt they were not always offered or could not find where to request specific delivery requirements, such as assistance bringing a parcel indoors or contactless delivery. They did not know whether they should request this via general registration of their needs with the company, or a clear space online when placing an order with a retailer to provide instructions to the delivery service. Where participants did notify companies of their requirements these were not always fulfilled by drivers.

Some participants tried or considered workarounds with notes pinned to their front door but were concerned that advertising their condition or their absence from the house made them vulnerable to break-ins.

### 6.2.4 A few participants chose to use services which they knew took account of their access needs

While participants generally did not exercise their service user choice when it came to their choice of delivery service, a minority of participants did choose services which took into account their specific needs. Where delivery companies got it right, giving customers with access requirements simple ways to notify them of their delivery requirements or offering familiar workers who would get to know their needs, we found some participants deliberately choosing to purchase through the retailers/platform using this delivery service.

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| ***Case study: Sylvia, has access requirements***  Sylvia lives in Belfast and has anxiety and depression. She therefore finds engaging and communicating with strangers to be challenging.  As a result, Sylvia relies on deliveries to access products as going to the shops in person can be overwhelming.  Sylvia requires communication from delivery companies regarding tracking and delivery time slots to understand when someone is approaching her house; this helps with her anxiety and avoids any complications with neighbours (as she lives in a flat with a shared entrance). Where possible, Sylvia likes to select ‘no contact delivery’ to avoid feeling uncomfortable when engaging with a delivery driver, though she cannot always see this option being offered by delivery companies.  *You can read Sylvia’s full story on* [*page 59*](#_3._Sylvia,_39,) |

## 6.3 Receiving experiences of rural participants

### 6.3.1 Receiving parcels worked best for rural participants when they were familiar with their delivery workers

Although not a stated need, many rural residents received a reliable and certain delivery service partly due to the positive relationships they had with workers delivering parcels to them. Those most familiar with their courier/postal worker described informal arrangements they had come to with the worker knowing where to leave items if they weren’t at home. Rural service users also had stronger trust than other service user groups that items left in a slightly more at-risk location outside the property would be safe there.

### 6.3.2 Deep rural participants struggled in particular with getting consistent delivery coverage

The most fundamental concern of residents in rural areas was that of **service** **coverage**. Although some noted an improvement in the frequency of parcel deliveries in their area over the last few years, those living in the most remote locations, potentially requiring transport by plane, were wary of ordering items on online marketplaces where the company used by the seller would not deliver to their location or because companies do not deliver there as frequently as other areas.

“On [popular online marketplace], one in ten suppliers don’t deliver here. Anything with compressed air like a thing of spray paint won’t deliver as it sometimes comes on the plane and it is prohibited.”

(Deep rural participant, Scotland)

“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. It’s part of the UK but part of Europe so there’s a wealth of restrictions that will probably get worse.”

(Deep rural participant, Northern Ireland)

“Living in a rural area, I have to leave more time, especially as they don’t deliver on weekends.”

(Deep rural participant, Wales)

These service users did not feel their need for **certainty** was being met by parcel delivery companies. Those living in remote areas, such as part of the Highlands and Islands felt their delivery times were longer than necessary and deliveries were delayed beyond original expectations as parcels ‘got stuck’ at depots.

“It usually takes minimum a week to two weeks. You will not get it in three to four days. I think we accept this time period because of where we are, but you still get annoyed if it takes a long time.”

(Deep rural micro business owner, Scotland)

Deliveries were not always **reliable** in reaching their address. This tended to be more of a problem in rural rather than deep rural areas where GPS systems consistently sent drivers unfamiliar with the area to the wrong location, whereas delivery workers in deep rural areas tended to be more familiar with the area. Some rural service users reported receiving confirmation of delivery, only to find that their parcel had been left at someone else’s door, sometimes leaving them to chase their parcel by informal means. This was sometimes interpreted as the driver ‘giving up’ on finding their address and just wanting to complete their drop; others thought there had been a genuine mistake (e.g. due to their house number being hard to see).

“I see a lot of adverts on our local town Facebook group where people haven’t received a parcel and they post the photo that is sent by the delivery driver to find out which house it is at. It seems to happen a lot.”

(Rural participant, England)

Although **flexibility** featured less than in the previous study, service users in this service user group did highlight the lack of alternative ways to obtain goods, such as click and collect in the most rural locations. This rendered them entirely dependent on parcel service companies and any charges that they might levy to reach their address.

### 6.3.3 Some rural participants were concerned about surcharges they had noticed applied to their location

Rural participants reported frustration about the application of surcharges by parcel delivery companies for delivery to their location. They felt uncertain about the exact nature of what surcharges they should expect, and whether it was only certain delivery companies who imposed these. These surcharges were occasionally too high to justify the purchase of certain items, particularly when they were smaller or lower value.

### 6.3.4 A few rural participants facing poor coverage or surcharges tried to choose providers to avoid those issues

We found little evidence of rural service users choosing to use particular parcel delivery companies. However, a few avoided certain online marketplaces for ordering goods or shopped around to try and avoid surcharges when online shopping.

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| ***Case study: Patrick, rural service user***  Patrick lives on a remote island in the Inner Hebrides, a three-hour sail from mainland Scotland. With a limited population on the island, Patrick relies on parcel deliveries to access a range of basic goods.  Patrick has a strong working relationship with his local delivery driver who brings the parcel into his hallway when he isn’t home as he leaves his door unlocked. However, living on a remote island, Patrick is still unable to access certain products such as aerosol cans or larger items as they cannot travel on the planes and is often presented with very high and inconsistent fees to deliver some products, which confuses and frustrates Patrick.  Despite these challenges, Patrick has noticed an improvement in the delivery services and the range of products he can access in the past ten years which has made him increasingly reliant on deliveries. |

## 6.4 Receiving experiences of micro business owners

### 6.4.1 Positive experiences were often based on familiarity

Micro business owners were pleased that most deliveries met their needs for reliability and certainty and allowed them to conduct their business efficiently, with parcels arriving in good condition and on time. They felt positive experiences were driven by familiarity with a delivery driver of service. Examples of where this familiarity had been achieved included drivers who knew the local area well and reached participants quickly, and the business owner working with the delivery company to help locate an address easily, such as by sharing a WhatsApp pin.

### 6.4.2 Their pain points were centred on providing a reliable and competitive service to their customers

Micro business owners experienced particular detriment if items were **not reliably delivered**. If parcels were left in a non-secure location, delivery drivers were unable to find their address or delivered to the wrong address, or left items exposed to the elements, the impact was felt not only by the participant but also their customer, as these resulted in delays to order fulfilment or difficulties with refunds. Participants wanted delivery companies to be more aware that these were business related deliveries.

“I don’t think knocking the door and running away is the best thing to do. I want to know that the parcel has reached the customer. It would be good if there was an option for parcels to be classed as business to avoid things being left outside homes at risk of burglary […] I don’t think they really would class me as a small business because it’s my home address. So I think I would be treated as a normal customer. Would it be different if going to a shop? […] They wouldn’t just leave a package at the door if it was shop.”

(Micro business owner, Northern Ireland)

“It wasn’t a cheap item, it was a £400 item that was just randomly left there, so yeah, not impressed with that at all.”

(Rural micro business owner, Northern Ireland)

Given the timing of the fieldwork, we also encountered delays for materials or parts either because they were being sent from the EU or due to staff shortages during the pandemic, affecting the **certainty** of deliveries.

“Brexit and the pandemic caused delays to people receiving goods… When sending to Europe, there were several parcels that would disappear. I haven’t experienced this in my 10 years of sending to Europe.”

(Micro business owner, Wales)

**Affordability** was also causing problems for micro businesses located in rural areas ordering supplies. Surcharges on deliveries to deep rural parts of the UK made by companies other than Royal Mail meant that business owners felt unable to buy supplies from preferred retailers because of the cost of delivery.

“There are a lot of suppliers but there’s a huge Highlands & Islands levy on delivery services, so lots of things you simply can’t buy […] We’re only two-and-a-bit hours from Glasgow, it’s not that isolated and it’s an enormous region with lots of different areas.”

(Deep rural participant and micro business owner, Scotland)

Similarly with returns, business owners and sellers must make a choice whether to absorb the cost of returns in the original sale price, affecting their competitiveness, or offering to cover the costs.

### 6.4.3 Micro business owners reported variation by provider

When customers returned items using a courier of their choice, micro business owners felt they suffered detriment, as they were unable to direct customers to their preferred courier in the same way as large retailers. The successful processing of returns depended greatly on the efficiency of the parcel delivery company and familiarity with their location.

“Some of the courier services will leave it close to the right address […] it’s difficult because I can’t tell the customer off because they’ve posted something in good faith with a courier service that says it can do a job. It doesn’t happen with RM but especially with rural locations other services they’ll be paid per drop, that’s how they receive their pay, so if one is 40 miles in the wrong direction you can see why they might not worry about that payment.”

(Rural micro business owner, Wales)

### 6.4.4 They did not feel they were able to exercise much choice

For supplies, micro business owners felt they were constrained by the choice of delivery company used by their preferred supplier. Even participants who were prepared to pay for an enhanced, perhaps speedier, service could be constrained by their location. Those based in the most rural locations often still had to rely on the same single courier for the final mile and if they did not, they were at risk of experiencing delays because the unfamiliar driver could not find their address.

## 6.5 Summary of most commonly unmet needs when receiving parcels

Across all service user groups, **reliability** and **affordability** were the two needs where issues were most likely to occur.

* **Reliability**: There were occasional issues with parcels going to the wrong address or instructions not being followed – and an unwillingness from participants to follow up by complaining.
* **Affordability**: While affordability had become more important in the context of the pandemic, service users seemed to engage with a limited number of delivery providers, in particular due to the lack of noticeable choice when shopping online.
* **Personal safety**: Parcel service users reported instances of delivery drivers not wearing a mask when in close contact or not keeping as much distance as participants felt was needed.

Parcel services could do more for service users with access requirements when it comes to communication, familiarity and accessibility:

* **Communication**: Those who did not identify opportunities to make additional requests, or who found their instructions not being followed, felt they would have been better served had they been able to communicate with the parcel service about their access requirement.
* **Familiarity**: When receiving parcels from a new delivery company, participants did not have the opportunity to develop a preferred method for how the provider could meet their access requirement.
* **Accessibility**: Those with lower digital literacy or access were unable to use online services such as tracking. Participants unable to lift a heavy parcel into their home had to ask neighbours for help when requests for support from the provider were either not followed or not possible.

There were gaps for rural service users when it came to reliability and service coverage:

* **Reliability**: Rural participants felt their location had led to items going to the wrong address, having to be collected or getting lost, meaning reliability could have been better.
* **Service coverage**: Rural residents in the research described being unable to receive items or use click and collect services that might be available at other locations.

More could be done to provide micro businesses with reliability, affordability and certainty:

* **Reliability**: Parcel services weren’t reliable when items were lost, left unattended or delivered to the wrong address.
* **Affordability**: This need wasn’t fully met when micro businesses faced additional and sometimes unexpected costs.
* **Certainty**: Delays in receiving supplies meant it was harder to maintain day-to-day operations and send customers their products.

# 7. Current experiences in Northern Ireland

Our research sample included eight participants based in Northern Ireland across the three target service user groups. As Northern Irish participants were in unique circumstances at the time of the research following the end of the EU Exit transition period, this section provides a summary of their experiences with parcel sending and delivery.[[18]](#footnote-19)

## 7.1 Experiences of sending in Northern Ireland

### 7.1.1 Experiences were mostly neutral or positive

As with other participants, the Northern Irish sample were broadly satisfied with parcel sending services. Parcels would usually arrive at their destination in an acceptable timeframe and in good condition, and participants described having positive or neutral experiences with delivery staff. The overall expectations for the sending experience were low, particularly when a parcel was not urgent or contained a lower value item. This meant there was lower interest in additional options such as next-day delivery or tracking, though having these options was always appreciated, and experiences of using them were mostly satisfactory.

### 7.1.2 But there was a specific set of needs and pain points for the Northern Irish sample

In addition to the unmet needs and pain points experienced by other people in the research, a few Northern Irish participants described noticing the following when sending parcels *outside* of Northern Ireland:

* **Additional costs**, on one occasion for returning goods to GB or sometimes due to customs charges apparently due on returns to NI businesses after the end of the EU Exit transition period[[19]](#footnote-20).
* **Delays,** due to customs checks.

The impact of this varied between individual consumers and micro businesses. For service users, while there was some frustration, sending outside of Northern Ireland was seen as fairly rare (e.g., returning an item to a GB-based retailer). Specifically, one participant reported that returning an item for which the supplier did not cover the return cost incurred a higher fee for Northern Ireland than it would have done from elsewhere in the UK.

For businesses, it contributed to disruption if they had dealings outside of Northern Ireland. For example, one business described losing money on a sale as a result of the checks involved, and having to consider whether or not to continue doing business abroad. There was a sense of confusion about how to deal with the issue and where to turn for information.

*“I’ve had some next day [deliveries] going out 4 days later. […] My wife sent a parcel back two weeks ago. It was £6 delivery [to send from] Northern Ireland but £3 for the rest of the UK.”*

(Micro business owner, Northern Ireland)

*“Delays, delays is really the thing. There is an order coming into Southern Ireland that has been held at customs now for 4-5 weeks. […] If I’m ordering something to a UK address or to a NI address, there’s always a NI surcharge somewhere between 5 and 12 pounds. That is an issue.”*

(Rural micro business owner, Northern Ireland)

*“Custom charges has been a first. We do a lot of business outside of the UK [about 25%]. So we send a lot of stuff, as far as Japan and Thailand to the EU, and that’s the first time I’ve had to pay customs charges on a return […] It delayed the delivery; it really annoyed the customer because it was held up in customs. He was annoyed to begin with, because it was a return. It turned the whole process into a loss for me, because you know not only do I have to pay his costs for sending it back, but I have to pay the shipping costs to send the right item out and I had to pay the customs charges, so actually made a net loss on those transaction charges. So if that continues, then I will have to stop selling abroad, because I cannot afford to keep risking that. All it takes is three or four of those a month and your profits are in the toilet, it’s an absolute nightmare.”*

(Rural micro business owner, Northern Ireland)

### 7.1.3 Most had not experienced sending via different providers

There was little experience of sending via more than one provider in the sample, and little notable difference in experience. A participant who had sent via a non-Royal Mail provider described not having an option to weigh the item when handing the parcel over, affecting the simplicity of the process, but also knowing that this provider would be cheaper for a heavier item.

### 7.1.4 Low engagement with choice of provider also meant that participants did not feel they were missing anything

There was low engagement with choice of provider in the sample. A sending service was chosen mostly on the basis of location, and most were more familiar with local Post Offices over other options. Micro businesses were more aware of non-Post Office options and one described using these for heavier items. Doorstep collections were not mentioned.

## 7.2 Experiences of receiving in Northern Ireland

### 7.2.1 Positive experiences were often a result of deliveries exceeding (sometimes low) expectations

As with sending, parcel receipt was a routine activity where the default was not to experience a noticeable problem. However, participants also described two more overtly positive experiences with some parcel deliveries:

* **Unexpectedly fast deliveries** for online retail orders. It was a pleasant surprise when items arrived early, particularly in the context of EU Exit and the pandemic. Respondents felt this was surprising because they had assumed an increased workload for delivery drivers as well as the prospect of general disruption to public and essential services.
* **Good experiences with delivery staff** as a result of familiarity with regular couriers. Participants described having enjoyable conversations as well as developing effective ‘ways of working’ if their location, an access requirement or another aspect of the participant’s life meant it would be useful to agree a particular, often more informal, process for delivering parcels.

### 7.2.2 For Northern Irish service users and businesses, there were additional needs and pain points not experienced by most living in mainland Britain

Northern Irish participants were more likely to describe experiencing problems with receiving parcels than with sending – and more likely to describe issues compared to other nations.

Nearly all participants described experiencing one or both of the following:

* **Delayed arrival.** Some knew this was connected specifically to a customs check; others were unsure as to the reason for the delay, though in a few cases reflected it could be related to EU Exit – whether because the item itself needed to be checked or because the end of the transition period was leading to disruption in general.
* **Additional charges.** As with delays, there was a mixture of participants who linked this to EU Exit (e.g. due to receiving a notification about a customs fee) and those who were unsure of the reason for this (e.g. if the delivery fee was simply higher than expected at the point of purchase). This uncertainty related in part to longer-standing experiences of higher delivery fees for Northern Ireland than for most parts of the UK – which were treated with a mixture of resigned acceptance and frustration.

These issues were more common to parcels being sent from outside Northern Ireland (e.g. from a retailer in Ireland or GB), than from parcels sent within Northern Ireland (e.g. from a family member or friend).

The impact of these issues varied across the sample. Some had not paid much attention to them, reflecting their general low interest in parcel delivery. By contrast, others (including micro businesses) were more frustrated due to the escalation of costs in particular. Micro businesses felt this had some impact on the smoothness of their operations – for example, having to order supplies further in advance in order to avoid a knock-on impact on deliveries to customers.

*“I’m paying more to receive some items. But I just don’t know if that’s a levy charge because of customs… It’s mainly been since the Brexit transition. Across the board (personal and business) […] The whole Brexit nonsense has created a few issues. I have had stuff come from Europe faster than from the UK and Ireland. […] ”*

(Micro business owner, Northern Ireland)

*“There was something, can’t really remember what it was, where I had to get it shipped to a friend in England and then he had to send it [on] through the Post Office to me, because the company [I wanted to buy the item from] wouldn’t send to NI. The impact was the cost of extra shipping, delay, but it was the only place I could have gotten the product. If I could have gotten it anywhere else, I would’ve avoided them. That was not great customer service.”*

(Micro business owner, Northern Ireland)

*“We had a delay with buying the [online marketplace] doll at Christmas. Not so much to do with Covid; I think it’s to do with Brexit coming over […] [there’s been a] big time impact since beginning of year […] I ordered an inflatable hot tub for the back garden. The company who were English said it was going to be at least 2 weeks and it was £70 for delivery – more than before […] Some company used to asked £1 for next day [delivery] before and it did come before Christmas, now it takes at least a week… if an item is not here when expected, you plan your stuff round what you needed to do, I freak out if they don’t arrive: ‘When are they going to come, what am I supposed to do?’ It makes me agitated and puts me in a mood for the day – I have to find something with the depression, find something to do like tidy up [instead].”*

(Access requirement, Northern Ireland)

Lastly,there was also some frustration around **service coverage.** A few participants had tried to buy certain items online and then discovered they would not be shipped to Northern Ireland at all. For some this was an ongoing problem, though a few experienced it more rarely, e.g., when buying from a new retailer, and others thought it was a temporary change related to EU Exit.

*“I mean it’s almost a standing joke in Northern Ireland, that you probably got like 70% of the range of options you do in the UK mainland. And if you want the selection that the UK mainland has, you’re going to be paying through the nose for it. People in Northern Ireland tend to get a bit narky about being second-class citizens sometimes. You go set yourself a shopping list of basic household items, try and buy them in a UK address and a Northern Irish address, and you’ll see a difference.”*

(Rural micro business owner, Northern Ireland)

*“There was a lot of [online marketplace] sellers that excluded [Northern Ireland], but I think now everybody sort of got the hang of it and stuck extra cash on […] if I do the same things in Northern Ireland it would take two days, and it would cost me between £4.99 or £12.99 for delivery depending on the size of the item. That is a huge difference.”*

(Rural micro business owner, Northern Ireland)

“*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. It’s part of the UK but also part of Europe, so there’s a wealth of restrictions that will probably get worse.”*

(Rural participant, Northern Ireland)

### 7.2.3 Variation by provider was largely seen as related to familiarity

Consistent with the remainder of the sample, participants described having more positive experiences when they were more familiar with the company and/or delivery driver. Some non-Royal Mail options were seen as more prone to causing problems (e.g. leaving an item unattended on a doorstep).

### 7.2.4 In line with GB, Northern Irish participants did not experience much choice of delivery company

As with the rest of the sample, participants tended not to experience a great deal of choice due to the nature of online retail and marketplace orders as well as deliveries from family and friends. Some micro businesses were more able and engaged with exercising choice when ordering specific supplies, particularly more expensive items when there was a choice between suppliers in the first instance. For larger items they would try and find a cheaper option, if possible, which tended to be non-Royal Mail.

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| ***Case study: Nathan, micro business owner***  Nathan runs a motorcycle parts business which ships internationally from a small village in Northern Ireland. He is also starting another company developing electric motorcycles, and therefore receives supplies from abroad.  Nathan has experienced a number of issues as a result of EU Exit such as delays and increased delivery times due to increased monitoring at customs. He has also seen a cost implication attached to receiving items from outside the UK. The delays and added costs are having a huge impact on his business and he is unsure if he is going to be able to carry on running the business effectively if these issues remain in the coming weeks and months.  Nathan is also unsure about the new regulations on sending and receiving parcels from within and out of the UK and EU. He recently tried sending something to a friend abroad various times and the parcel kept getting returned to Nathan opened. He then discovered that he wasn’t allowed to send that item, but he was not informed about it.  *You can read Nathan’s full story on* [*page 63*](#_7._Nathan,_Northern) |

# 8. Extended case studies

This section provides some case studies that detail the circumstances and views of individual research participants in depth. These illustrate how the needs and issues described in sections 4-7 were actually experienced in practice.

This section does not therefore provide further analysis of needs for parcel services and whether or not these are being met, but is here to bring the research to life and show how needs interacted with one another at an individual level (including for participants who belonged to more than one research service user group).

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| 1. Julia, 27, London. Has Access Requirements.  * Frequency of receiving parcels: Twice per week or more * Frequency of sending parcels: Between once a week and once a month |

Julia has an undiagnosed physical impairment which results in spasms down one side of her body that are frequently brought on by movements such as walking. When this occurs, it will mean Julia has to spend the rest of the day lying down due to pain.

Julia has good days and bad days; however, the unpredictability of her condition limits her ability to leave her house and access shops on her own in fear of having a spasm. As a result of her condition and the impact it has on her when being out of the house, as well as the impact of the pandemic and fear of contracting Covid-19, Julia relies heavily on deliveries to access all types of products.

“I get spasms down my side, often when going down the stairs which is difficult when you have an impatient delivery driver. This means I get stuck having spasms for an hour […] I have good or bad days – I’ll be carrying shopping and it can hit me in the middle and can’t carry shopping anymore. I have to make sure I have my uber to hand.”

Julia often misses deliveries when she is home alone, as she takes longer to get down the stairs and answer the door. This is an increased challenge when using certain delivery companies who she says are more impatient and do not wait at the door. This upsets her: missing deliveries is a constant reminder of her disability.

Julia likes and is familiar with a regular delivery driver who is more patient and personable. She is also fond of a provider with an effective tracking system that alerts Julia of when the parcel might arrive. The communication and increased awareness of when the parcel will arrive is very important for Julia who has to plan her days around her condition.

*“The services really vary. Some are quite personal, but others throw the parcel and leave. I often hear the door ring and by the time I get there, they’ve left […] I want to be able to track my parcel and for them to communicate when it’s going to arrive”*

Julia occasionally sends parcels to friends and family. However, she finds the process of going to the Post Office painful and challenging due to the long queues and the lack of accessibility features in post offices. She doesn’t think delivery services are considerate of people with mobility issues when sending or receiving parcels. Julia looked into using post collection services, but realised she needed to print off a label and she did not have access to a printer. She would like to be able to use a QR code to send parcels instead.

*“I send things via the post office […] I usually have to wait in the cold for 45 minutes and there are no seats to rest. If I see a big queue, I leave or go early the next day. I always need to time it well.”*

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| 2. Brittany, 25, Port Talbot. Has access requirements.  * Frequency of receiving parcels: Twice per week or more * Frequency of sending parcels: Between once a week and once a month |

Brittany has a number of disabilities which heavily impact her life and her ability to undertake simple tasks such as walking or cooking without feeling pain or fatigue. Brittany has 10-minute bursts of energy where she can do things, though often uses crutches or a wheelchair when out of the house. She relies heavily on her partner to help her with tasks like sending parcels.

“I have a ton of diagnoses, but basically I am tired a lot and in pain a lot. I can do 10-minute bursts. Outside, I use crutches or a wheelchair. I have to limit what I do each day and have support.”

Brittany recently moved to Port Talbot from Exeter where she was finishing her university degree. Brittany feels vulnerable to falling seriously ill if she catches Covid-19 and has therefore been relying more on deliveries to access products during the pandemic.

In addition, Brittany sends gifts that she crafts around once a week to family and friends. Having experienced a number of accessibility issues in the past prompted her to attempt to look up the accessibility features of her local Post Office online, but she struggled to find accurate and up-to-date information. To work around this, she asked her partner to visit the Post Office before attempting to go herself. However, the Post Office only opens from 9am-4pm Monday to Friday and is therefore closed outside her partner’s working hours, making it challenging to find the time to send parcels.

“I looked into the parcel collection to send service, but it was too expensive, and I thought it wasn’t worth it. I just waited a few days for my partner to go to the post office.”

Brittany has often found that information online about Post Offices’ accessibility features is inaccurate or out of date. Brittany suggests offering a virtual tour of each post office so that people can see for themselves what features are there, and which ones are not, since in her view being ‘accessible’ means different things according to different needs. Brittany also raises concerns about some delivery staff who are not sufficiently trained or educated to effectively engage with those with an access requirement.

“The local post office is level access, but the staff aren’t adequately trained to help those with additional needs. A video tour of the inside would be incredibly helpful, similar to street view on Google Maps.”

Brittany likes choosing specific options when getting parcels delivered as she is often not able to carry heavy parcels into the house. However, she raises issues with actually finding and using these options or instruction boxes across all delivery companies. She believes they should be standardised and compulsory. She has also found her instructions being ignored in the past. For example, she once ordered a heavy parcel, and she asked the driver to bring it inside. However, they just left the parcel on the doorstep and Brittany was unable to collect it until her partner came home from work. She was worried that the parcel could get damaged outside in the rain or that someone would steal it.

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| 3. Sylvia, 39, Belfast. Has access requirements.  * Frequency of receiving parcels: Twice per week or more * Frequency of sending parcels: Between once a week and once a month |

Sylvia suffers from depression and says she struggles meeting and engaging with new people. She therefore relies on deliveries to access products as going to the shops is often overwhelming and daunting. When receiving parcels, Sylvia prefers a regular postman who she is more familiar with and who has an understanding of her condition. The pandemic has meant Sylvia is more reliant on deliveries as many non-essential shops are closed.

*“I probably rely on deliveries more than I used to. I don’t like going out and about. Before, I would have shopped on my way home but now I do it all online.”*

For Sylvia, communication is crucial to ensure she doesn’t worry about missing deliveries and knows when someone will be approaching her house. Sylvia feels concerned when a stranger approaches her house, as she has young children. As a result, she prefers having timeslots from delivery companies alerting her of when a parcel may arrive. Sylvia also lives in a flat with a shared entrance, so prefers to be in the house when a delivery is arriving, to ensure there are no complications delivering it to neighbours. She also likes to select the option of no-contact delivery where possible.

*“I like being able to select a time for delivery so I can be there to ensure it has arrived safely and don’t want to risk losing it or children getting hold of it.”*

Sylvia has noticed an increase in the provision of estimated delivery times as well as a cost increase, which she presumes is due to Brexit and items being stuck in customs. Sylvia listed a handful of deliveries which had been delayed or increased delivery cost since the start of 2021.

*“Since the start of the year, I’ve noticed parcels taking longer to arrive or arriving late. Not so much to do with Covid-19, I think it’s to do with Brexit.”*

Sylvia tends to send a couple of parcels a month such as clothes to a friend or product returns to a retailer. She tends to use Royal Mail as she is not aware of any other service she can use to send parcels. They are the first option that comes to mind, and she can post an item while also picking up a carton of milk at her local post office. The process of sending a parcel can be quite daunting for Sylvia, though she is familiar with the employees at her local post office which helps calm her anxieties.

She has noticed a decrease in the speed at which items she sends and receives are being delivered over the past few months, though expects this might be due to Covid-19 and delivery services being stretched.

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| 4. Martin, Scottish Island, 56. Deep rural service user and micro business owner.  * Frequency of receiving parcels: Twice per week or more * Frequency of sending parcels: Twice per week or more |

Martin lives on a Scottish island with a small population, where he manages a gin distillery.

Due to the limitations of what local shops supply, Martin relies heavily on receiving parcels, ranging from food to furniture. The pandemic has not had much of an impact on his parcel usage, other than sending more parcels to friends and family as a way to stay connected when they aren’t able to see each other.

Martin has noticed an improvement in the deliveries he is able to access now compared to 10 years ago, when most retailers did not deliver to remote islands. Martin states that this is due to recent agreements that have been made between local couriers and larger delivery companies, which ensure the local couriers complete the final part of the parcel journey. This has been hugely beneficial to him as he is now able to purchase a wider range of items. However, he occasionally still finds that some retailers will not deliver to the island.

Martin used to live in Inverness and noticed parcels arrived faster compared to his current home, where most parcels take seven to ten days to arrive. However, Martin is understanding of the fact that he lives on a remote island and does not expect to be offered next day delivery. The weather, however, does impact the time it takes to receive or send parcels, as they come via a boat – so heavy wind and rain often causes delays.

“In Inverness, I could pass three or four post offices on my way to work, whereas here there is only one which is five miles from the distillery.”

“It usually takes minimum a week to two weeks. You will not get it in three to four days. I think we accept this time period because of where we are, but you still get annoyed if it takes a long time.”

Martin relies on his local Post Office to send items for the distillery business, typically three to five bottles a day. On the one hand, he is happy with the great working relationship he has with the local Post Office whereby he leaves the parcels in their stock room with the correct amount of money and the postman will sort these for him, so he doesn’t have to queue. However, there are a number of limitations to sending his parcels via Royal Mail, such as having to send bottles out individually rather than in a box of four as it is cheaper to send in smaller boxes. This often results in a number of bottles arriving to customers at different times, and leads to complaints.

“I’d tell [shop assistant] I have 42 bottles and she would just give me the receipt. We have a system where she doesn’t check what I’m doing – lots of trust. If there’s a lot of people waiting, I just leave it in the back door with some money and she will do it all for me.”

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| 5. Natasha, Aberdeenshire, 35. Deep rural service user.  * Frequency of receiving parcels: Twice per week or more * Frequency of sending parcels: Around once a week |

Natasha lives in a rural village in Aberdeenshire and her nearest neighbours live a mile away. Due to the limited number of shops available to Natasha nearby, she relies on deliveries to access more specialist products which she is not able to buy in her local shop. The pandemic hasn’t had much of an impact on Natasha’s delivery usage.

Natasha lives at the end of a dead-end lane and is not covered by a number of delivery companies. She is often quoted extremely high delivery costs (in excess of £50) to get certain items delivered. Despite this challenge, she has noticed an improvement over the last few years where more couriers and delivery drivers are delivering to her home at a standard rate.

Her location also presents a specific challenge relating to access to her home when the weather conditions are poor due to heavy rain or snow. As a result, she is not able to access deliveries when the road is flooded or snowed under, as the delivery vans are not suited to driving in those conditions. This is a frequent problem which Natasha encounters given the climate in Aberdeenshire. The unpredictable weather makes it challenging to plan ahead.

“Deliveries are normally quite good, unless the weather is poor. Recently, we had 7 weeks of deep snow and were cut off from any deliveries.”

Royal Mail are their preferred delivery company as they have better knowledge of the local area and have specific plans in place when the weather is poor, such as leaving parcels in designated places for the home-owners to collect with their 4x4’s. Three other providers also deliver to the local area; however, they often aren’t able to find the property or leave the parcel in a strange location, such as by the recycling bin.

“Royal Mail are very supportive. They get parcels as far as possible and then locals can bring them up in better vehicles…[courier] often leave parcels in weird places.”

Though Natasha typically sends parcels using her local Post Office, which is a few miles away, she recently sent ten packages of local beef to family and friends in Edinburgh and Perth. She used a local courier recommended by local farmers. The courier was meant to arrive to pick up the products from her farm between 9am and 5pm the next day. However, they arrived a day later at 5.30pm. When tracking the parcel, Natasha was having issues with four parcels whose status was not updating and were sitting in a depot in Aberdeen. As these were perishable goods, this caused high levels of anxiety for Natasha. Natasha ended up booking another courier to collect and deliver the beef from the APC courier’s depot in Aberdeen after four days of it being there.

“I ended up having to arrange another courier to go find and collect the parcels from the depot and take them to the three remaining addresses. It cost a lot of money in the end.”

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| 6. Rupert, Northern Ireland. Rural service user.  * Frequency of receiving parcels: Around once a week * Frequency of sending parcels: Around once a week, including selling on a marketplace |

Rupert lives in a village ten miles outside of Belfast. His house is not near any shops, and he therefore has to drive to access shops and parcel services. Rupert used to live in Belfast city centre and has noticed a large difference in the delivery services, mainly relating to the length of time it takes to arrive. He used to be able to get same or next-day delivery, however he is no longer able to access such short delivery times; deliveries also tend to come late in the day.

Other than changes to the ‘handover’ of the parcel, Covid-19 has not had much of an impact on the delivery services Rupert engages with, though he has noticed an increase in the number of items he gets delivered. Rupert recently purchased an item delivered via a provider who provided a timeslot for the delivery. He was impressed when he was texted this on the morning of the delivery, as he could ensure someone would be at home to receive the parcel. Rupert has had bad experiences with another provider not delivering on the correct day, and in one case it was never delivered.

“Other than their ability to come into the house, Covid-19 hasn’t changed much, though I have noticed I’m ordering more parcels now that shops are shut.”

Rupert sells trinkets and CDs using Facebook Marketplace and Etsy. He usually sends his items using his local Post Office which is a couple of miles away. Rupert selected Tracked and second class, as the items weren’t high value, but he needed to know where the item was in case the customer asked for an update. Rupert was not sure whose responsibility it was to sort out any issues regarding the delivery – whether it is the seller or the delivery company. Due to the difficulties in contacting the delivery companies, customers tend to rely on the sellers to find out about their delivery and provide updates.

“While on furlough, I started making trinkets and selling them on Facebook Marketplace…I sent them via Royal Mail second class tracked as it is cheaper than first class, but I need to send the tracking number to the customer.”

Improving tracking services to be more reliable, accurate and standardised for all deliveries is a priority for Rupert, who relies heavily on delivery services to sell his products. He recently had an experience with one delivery company where he was unable to track his order as his tracking number wasn’t being identified by the tracking software. He was waiting on this delivery to arrive to send it to a customer who had already purchased this and was expecting his delivery. This delay from the company had an impact on his reputation as a seller on the marketplace.

“In the future, I expect there to be an improvement in the tracking services. They should have more accurate delivery timeslots and tracking should be made a standard option for all parcels.”

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| 7. Nathan, Northern Ireland, 44. Rural Micro business.  * Nature of business: Motor vehicle supply * Frequency of receiving parcels: Twice per week or more * Frequency of sending parcels: Twice per week or more |

Nathan lives in a village in Northern Ireland, 20 miles from Belfast. He runs a motorcycle parts business which ships nationally and internationally. He has also started another company in a similar space and so has been ordering specialist parts, typically from Hungary and China.

In terms of rurality, Nathan has noticed a big improvement in delivery services over recent years, with parcels arriving much faster than they used to. However, he still believes the services aren’t as good as they would be if he lived in a larger town or city, as he often finds his deliveries arrive late in the day and would imagine he would have a wider range of delivery options when sending or receiving.

Nathan has experienced issues as a result of Brexit in terms of sending and receiving parcels. He has noticed a large variation in the time it takes to receive parcels, even if they’re coming from within the UK. He assumes this is due to increased monitoring at customs. It has a large impact on his business as he is heavily reliant on sending and receiving parts to operate effectively. This delay also applies when sending or receiving from the Republic of Ireland where a lot of his customers are, which has a huge impact on his business and his ability to send parcels in a timely manner. He has also noticed a surcharge of £5-12 for ordering something from abroad to the UK, which really adds up when ordering multiple parts a week.

“Delays are really the thing. There is an order coming into Southern Ireland that has been held at customs now for four or five weeks. And one of the things in that order from the supplier didn’t make it, so once the supplier isn’t getting it, means he can’t get it to me, which means I can’t get it to my customer.”

Nathan sends smaller parcels with Royal Mail as they are cheaper and more convenient. However, he uses other services for anything that is heavier, larger and more valuable. He always pays extra to track his parcels so he is able to locate them when customers ask where a parcel is or if they say they haven’t received it.

“Yes, for everything I send through the business now, it’s always tracked. Because there are a lot of people who say they never got that. It’s worth paying the extra for it. It adds a bit of extra pounds to the shipping, but it’s cheaper than the cost of people saying they didn’t get it, especially on higher value items.”

Nathan is unsure about the new regulations on sending and receiving parcels as someone in Northern Ireland. He recently tried sending something to a friend abroad various times and the parcel kept getting returned to Nathan opened. He then discovered that he wasn’t allowed to send that item, but he was not informed about this at the sending stage.

|  |
| --- |
| 8. Ellie, Staffordshire, 41. Micro business.  * Nature of business: Antique / homeware sales * Frequency of receiving parcels: Around once or twice a week * Frequency of sending parcels: Twice per week or more |

Ellie currently lives with her parents in Staffordshire. She sells homeware and antiques on eBay for a living. A typical day for Ellie involves admin, working on her website, arranging her eBay listings and bids, and helping her parents around the house. She receives parcels regularly and is broadly happy with this.

"I think I’m pretty happy, they’re good, my Parcelforce man is great, and I get on with him really well. In a village, wherever I’ve lived I’ve tried to get to know the people. My [delivery company] lady here is brilliant. Once you get to know them it’s great – you’ve got to build this relationship and you get a better service. We help each other out."

Ellie is proud of her eBay rating and places a great deal of importance on her reputation and rating to ensure more customers buy from her. As a result, she is heavily reliant on courier companies effectively delivering her products undamaged and in a timely manner so she can keep her high rating.

Ellie tends to use a non-Royal Mail provider to deliver parcels. This is due to the convenience, lower price for her products, and the friendliness of the staff at the local drop-off point. She tends to avoid using another local option as she feels the staff are unfriendly and rude. Ellie believes in building a good working relationship with the delivery companies as key to ensuring her deliveries run smoothly and to ensure her parcels are treated with care and prioritised.

“I'm really pleased with what I have around me for parcels, I just wish there was a better Post Office. I'm put off by Royal Mail because they’re grumpy, I would do more through [them], and have done when I lived somewhere else, even for more money if they weren't so grumpy.”

Ellie did encounter an issue when sending a parcel abroad to a customer who had got in touch to say that the parcel had not arrived despite the courier sending Ellie a confirmation message stating it had been delivered. This then resulted in Ellie trying to get in contact with the courier, the marketplace website and the payment provider to try and resolve the problem and locate the parcel. They could not locate the item; she was refunded and told this was a common problem.

To improve parcel services, Ellie would like to see a collection service being tied into a delivery service, so that people can book in parcel pick-ups at the same time they receive a delivery.

“It would be good to be able to book a pick-up slot as part of a delivery, so that when you receive something, the driver takes your parcels to be sent.”

# 9. Improving parcel services for service users

Our recommendations are grounded in the suggestions made by participants as they recounted their experiences of sending and receiving parcels. Recommendations range from ensuring more consistency across providers, to initiatives to improve services for customers with specific needs.

## 9.1 Improving services across service user groups

Across service user groups, the issues described in this research suggest that the needs which are being met least often are:

* **Affordability (for both sending and receiving parcels).** While cited as a particular concern of micro businesses, affordability had become more important in the context of the pandemic to many service users. Despite this, there was limited engagement with delivery providers. This was often due to structural reasons – such as the lack of choice of delivery company when shopping online, or low awareness of alternatives to Royal Mail when sending. However, the routine nature of parcel delivery as an activity also seemed to limit interest in pro-active engagement in the marketplace.
* **Personal safety (for sending in particular).** While it may be temporary, there were concerns around Post Offices, depots and drop-off points being crowded and risk of Covid-19 transmission. These concerns were stronger and had a greater impact among those with access requirements, who were more likely to consider themselves as higher risk in relation to the virus.

Potential areas for consideration that might address these needs are as follows:

|  |  |
| --- | --- |
| **Considerations for affordability:** | 1. For receiving – whether there could be **greater transparency and choice of delivery company at the point of purchase**. For example, online retailers and marketplace sellers could be more explicit about which delivery companies they will be using and what options are available, ideally at multiple points in the purchase process (rather than being listed under terms & conditions or only being included at the checkout page). 2. For sending – whether service users would benefit from **a single hub from which a parcel service user can compare delivery providers**. This could take the form of an enhanced online comparison service between companies or could even be something that is provided in-person at the point of sending, since service users would be unlikely to visit multiple sites in person to compare options.   It will, however, be important to also consider **how to encourage greater service user engagement with the marketplace without this being overly complex**. Service users value simplicity, and so will need to be motivated to engage with choice easily. There is also a risk that enhanced comparison-style services only draw attention from more ‘savvy’ service users who engage with similar services in other markets. |
| **Considerations for personal safety issues** | 1. In some instances, service users may simply need **more reassurance** about the social distancing measures that are in place for in-person services. 2. However, for particularly busy services and those that are in a more crowded retail space, it may be necessary to **enhance staff resourcing, extend opening hours, and/or offer dedicated hours** for those at greater risk from catching the virus during the pandemic. |

## 9.2 Improving services for specific service user groups

While there were some common issues across service user groups, some of the issues were felt by parcel service users in unique ways. The table below summarises the unique needs for each service user group, with those only that were most commonly unmet marked with an asterisk (\*).

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Service users with access requirements** | **Rural service users** | **Micro businesses** |
| *Needs for receiving* | Communication\*  Reliability | Communication  Tracking  Affordability |  |
| *Needs for receiving and sending* | Accessibility\*  Personal safety  Certainty  Familiarity\* | Reliability\*  Service coverage\* | Reliability\*  Affordability\*  Certainty\* |
| *Needs for sending* |  | Certainty\* | Service coverage  Option for urgency  Tracking |

### 9.2.1 Communication, familiarity, and accessibility may be key to improving services for those with access requirements

Some of this service user group **could not find out how to specify access requirements or did not notice prompts for doing so** when receiving parcels; others found their instructions about these were not being followed. This could leave some participants unable to bring a parcel indoors without support from other people.Considerations for addressing this may include:

* Whether there are clear and accessible enough opportunities for specifying access requirements across the retail and parcel markets, and whether there is a need to standardise these opportunities for ease of completion. For example, it might be easier to provide notice of an access requirement if there is a central register of delivery requirements.
* How to ensure service users’ requests translate into action on the part of delivery companies. In particular, it will be important to avoid situations in which someone specifying access requirements then suffers detriment as a result of this (e.g. if they feel information about their health has been unnecessarily shared) or cause any friction with providers.
* When needs are not followed, what accountability mechanisms are in place and how to encourage service users to engage with these.

There was also **low familiarity** with couriers and delivery companies who don’t visit parcel service users as often as others. This created uncertainty around whether or not access requirements could be met by these providers. To some extent this was a concern for sending parcels as well as receiving, as a service user might benefit from Post Office or other staff being more familiar with them or their circumstances. Considerations for addressing this may include:

* As above, improved means of specifying access requirements for deliveries.
* Whether there could be more direct contact with drivers to inform them about requirements, or access to specific apps that communicate access requirements across providers, so that a service user doesn’t have to keep track of which providers are or aren’t aware of their needs.
* Whether service users could receive more information about the identity of their delivery driver, to encourage greater trust regarding who will be arriving at their address.

Finally, there were a range of **accessibility** issues with physically accessing Post Offices and collection points, as well as digital access problems. Considerations for addressing this may include:

* How to enhance the accessibility of Post Offices and other sending services. Previous research has noted this is inconsistent;[[20]](#footnote-21) some in this study also found it difficult to use their local Post Office.
* How to improve accessibility information about postal services. This could be provided more systematically in available communications about sending services. But there may also be opportunities for providing this information in other formats. One participant, for example, suggested an online, virtual tour of a Post Office would help them identify any issues for their access requirements.
* How to prioritise offline and telephone channels for service users without access to a computer or smartphone.
* Whether those unable to travel to a drop-off point could benefit from cheaper at-home collection services, which were seen as being potentially too costly to use.
  + One participant wondered why a delivery company who provided mail couldn’t also collect mail, and if this would be more efficient.
  + A few participants also liked the idea of enhanced at-home collection services via secure boxes or drone collection – though others thought such ideas would be impractical.
* Whether parcel service staff could receive training around how to communicate with customers who have access requirements linked to a health condition, disability or impairment.

### 9.2.2 Better coverage and reliability may help to improve services for rural residents

Rural service users were more likely to experience problems with both **certainty and reliability,** in some cases describing long delivery times and items being lost or going to wrong addresses, across both receiving and sending parcels. These issues seemed related either to their isolated address or the distance between the sender’s local delivery services and the recipient’s address. Considerations for addressing this may include:

* Whether it would be useful to classify – or allow service users to classify themselves – as ‘rural’, in order to encourage providers to develop specific measures for ensuring parcels reach the right service user on time, such as:
  + Enabling more direct contact between a driver and service user (see below).
  + Encouraging service users to provide more information about how to find their address (for example, via an open text box or tick-box options).
  + Asking delivery drivers to prioritise reviewing service user instructions over satnav directions.
  + Providing drivers unfamiliar with the area (and/or more used to neighbouring, less rural areas) about its characteristics, and encouraging them to communicate directly with the customer.
  + Encouraging delivery services to provide realistic timeframes for delivery based on location.
* Whether it’s more important to improve and encourage use of ‘additional information’ boxes among rural service user groups (and encourage greater attention to these on the part of delivery services).
* How to encourage service users to seek redress when a parcel is undelivered because a provider did not follow these instructions. Service users seemed reluctant to seek redress beyond rectifying financial losses; but without a stronger redress process it may be that trust and confidence in services is undermined.
* What other services could be used to maximise the ability for drivers to find service users’ addresses, via use of location data. For example, if a service user could share their live location via an online pin or be provided with a secure method for having direct contact with a driver.

Some cited issues with **service coverage**, particularly deep rural service users who noted some providers do not deliver to their address, and rural service users in areas with perceived or actual limited options for sending parcels. Considerations for addressing this may include:

* How to encourage a wider variety of service providers for sending in rural areas. For example, having more providers available at a single location may encourage greater engagement, while also lessening the risk of a service having to close down.
* What information about choices service users might find useful. For example, an online hub mapping all parcel services (not just Post Offices) in local areas might inform rural residents of options for sending that they were previously unaware of. And as with all service user groups, finding ways to increase transparency around delivery provider during the online retail experience could also improve awareness of this for receiving parcels.
* Whether online marketplace sellers could be educated about the impact of their choice of delivery company on buyer experience, and encouraged to offer a wider range of delivery options so that their products are accessible to a wider range of customers.

### 9.2.3 Strengthened reliability and certainty, as well as clarity about prices may help to improve services for micro businesses

For both sending and receiving parcels, there was some frustration around business parcels being left outdoors, being sent to the wrong address, or getting lost – the impact was seen as far greater than when it took place in a personal context, due to the disruption it would have on day-to-day operations as well as customer satisfaction. Considerations for addressing these **reliability and certainty issues** may include:

* Whether service users need clearer options around specifying whether they are a business or service user.
* Whether service users need clearer information about redress and complaints processes. There were examples of businesses refunding a customer after a failed delivery, even when the delivery company was liable for the error. Thus making it particularly important that they are able to easily and successfully seek redress that avoids financial loss.

There were issues around delays and costs due to EU Exit and the pandemic. Inconsistent pricing structures for sending parcels used by different providers also made it harder to navigate options. These problems undermined **certainty and affordability.** Considerations for addressing this may include:

* Whether micro businesses need additional financial support related to new fees, as well as guidance about how to navigate changes related to the end of the transition period. This fee ls particularly important for Northern Irish micro businesses where these problems are heightened – and where concerns are stronger due to the risk of not being able to continue business within Great Britain.
* For sending, whether there should be a requirement for delivery services to use the same size/weight bands so that it is easier to compare pricing between providers.
* While micro businesses were more engaged with the range of providers and options available to them, they would also stand to benefit from the measures addressing service user engagement outlined above (section 8.1). This is particularly important considering the importance of affordability to day-to-day operations.

# 10. Appendix

## 10.1 Research approach

Given the need to explore experiences of parcel service users in depth, understand their interactions with a range of service providers for both sending and receiving, and how these vary depending on service user’s individual circumstances and needs, a qualitative approach was taken.

40 parcel service users were asked to take part in depth interviews, as follows:

1. Participants were first asked to completea short pre-task **exercise to capture recent experiences of sending and receiving parcels** in granular detail, to act as a prompt during the interview. This exercise took the form of a ‘diary’.
2. All then took part in **a 45-minute telephone or video depth interview**.

**1. Pre-task exercise shared with participants**

*The following was shared in a mix of paper and online formats in a ‘diary’ format enabling multiple entries for up to 8 parcels.*

|  |  |  |
| --- | --- | --- |
| **Question number** | **For Parcels Received** | **For Parcels Sent** |
|  | What was the item? | *See left* |
|  | What was the delivery cost to you (not including the cost of the item itself)  if anything? | *See left* |
|  | Roughly, how much did the item weigh? Please put a cross below the option that applies to you:   * Less than 250 grams * Less than 250 grams (or, the weight of a medium or large potato) * Between 250 grams and a kilo (or, the weight of 2-4 large potatoes) * Between 1 and 5 kilos (or, the weight of a bag of large potatoes) * Between 5 and 10 kilos (or, a sack of potatoes) * Over 10 kilos (at least two sacks of potatoes!) * Don’t know | *See left* |
|  | Roughly, how large was the parcel you received? Please put a cross below the option that applies to you.  [OPTIONS SHOWN OF DIFFERENT BOX SIZES NEXT TO A PERSON’S BODY]. | *See left* |
|  | Which company delivered the item?Please put a cross below the relevant option:   * Royal Mail * Hermes * DPD * Parcelforce * FedEx * Yodel * DHL * UPS * Amazon / Amazon Prime * Other, please specify * Don’t Know | *See left* |
|  | And were you given a choice over which company would deliver the item?   * Yes * No * Don’t Know | How long did it take for your item to be delivered? Please put a cross next to the option that applies to you.   * Same-day delivery * Next day delivery * 2 day deliver * 3–5-day delivery * 5–19-day delivery * Other – please specify * Don’t Know |
|  | What type of sender sent the parcel? Please put a cross next to the option(s) that applies to you.   * Friend/family * eBay/Etsy seller * Customer (if applicable) * Retailer/supplier * Other – please specify: | And was this what you expected based on the service you had paid for? Please put a cross next to the option that applies to you.   * Yes * No, it was faster than I expected * No, it was slower than I expected * Don’t Know |
|  | Were you given a date and time slot that the parcel would arrive? Please put a cross next to the option(s) that applies to you.   * Yes, date and time * Yes, just date * No * Don’t know   *If Yes*: did the parcel arrive at that time (or the new time, if you requested another delivery slot)?   * Yes * No * Don’t know | Overall, how would you describe your experience of sending this parcel? What more might have met your needs? |
|  | Were you offered any of the following options for the delivery? Please put a cross next to the option(s) that applies to you.   * Special delivery * First Class * Second Class * Tracked * Signed for * Leave at a designated safe place * Leave with my neighbour * Set a time that suited me for the delivery to arrive at * Help bringing the item into the building * Stay away from the door * None of these options offered * Other, please specify | N/A – no question asked |
|  | How exactly was the parcel delivered to you? Please put a cross next to the option(s) that applies to you.   * Through the letterbox * Left in my designated safe place * Handed over on the doorstep * Left with a neighbour * Left outside the door * Returned to the depot for collection * Left at a collection point * Other, please specify | N/A – no question asked |
|  | Were the contents of the parcel in good condition when they arrived?   * Yes * No * Don’t Know   If not, please describe the problem? | N/A – no question asked |
|  | Overall, how would you describe your experience of receiving this parcel? What more might have met your needs? | N/A – no question asked |

**2. Discussion guide used in depth interviews**

*Given the time constraints of a 45-minute interview, moderators used this guide flexibly depending on the most relevant questions for the research participant (e.g. based on service user type or experiences).*

| **Section and theme** | **Key discussion points and probes** |
| --- | --- |
| **Section 1: Introduction** | * *Moderator to run through introduction to research, consent, and other housekeeping.* * *Ask participants to introduce themselves covering:*    + *Name and age*   + *How long they have lived in the area*   + *What type of building they live in, and for flats, if there is a shared entrance hall?*   + *[FOR MICRO-BUSINESSES:] What their business is, how long it has been running for, whether sole trader or working with employees, where the work is based (home vs. other location[s])*   + *[FOR OTHERS:] Home life, job, hobbies, whether or not sell items via online marketplace etc.* * **What does a typical day in your life look like?**   + *NB. if disabled/have LTC make sure to ask this question:* I understand you have a disability or health condition. Could you tell me about this and how it affects your day-to-day life? *Moderator to then to refer to disability/health condition in participant’s own language throughout interview.* * **How do you feel about postal services where you live?** *Moderator to probe on location of postbox, relationship with postwoman/man, location of post office and other parcel collection/drop-off points.*   + *FOR RURAL PARTICIPANTS ASK:* to what extent do you think your postal services would be different if you lived elsewhere?   *Moderator to review pre-task and choose whether to start with receiving/sending parcels, ensuring a good mix across interviews. If not clear whether receiving/sending is more relevant for participant, ask participant which they have experienced more issues with.* |
| **Section 2: Receiving parcels**  **Section 2a Choice of delivery company**  ***How much is the service user looking for certainty, reliability and flexibility in who delivers their parcel?*** | I’d like to start with your experience of receiving parcels using one of the deliveries you’ve described in the diary we asked you to fill in.  *Moderator refer to pre-task and agree which delivery to be discussed, note clearly if this was B2C or C2X and type of C2X (friends and family or return to business).*  *Use pre task responses to probe throughout on choice available and unmet need. Recap with participant on who sent the parcel, size, cost to the service user etc.*  *If B2C:*   * **I see the parcel was delivered by [name of company].**   If no choice: **Would they have been you first choice of delivery service if you’d been given one?**  If choice: **Why did you select that company to deliver your parcel?**  *Probe on factors that affect choice (or lack of).*   * *Only option for location (if rural or NI probe more about limitations)* * *Purpose of delivery (e.g. personal shopping, business use, delivery from family/friends)* * *Cost* * *Convenient pick-up location (accessibility, opening times)* * *Speed of delivery* * *Familiarity* * *Service quality* * *Known delivery driver* * *Tracking options* * *Being able to return the item(s)*   *If C2X:*   * **I see the parcel was delivered by [name of company].**   **Did you select the delivery service or the sender?** *If theirs:* **Why did you select that company to deliver the parcel?**  *Probe on reasons as applicable, including: awareness of choice, what needs are driving any preferences, ease of proof of sending if customer returning parcel, price.* |
| **Section 2b: Experience of planning for parcel receipt**  ***What control did the service user have to track their parcel, be certain when it would be delivered, and flexibility if they needed to change this?*** | *Moderator review which options the participant was offered for the delivery of the parcel.*   * **I see you were offered [options] for this parcel delivery?**   *Probe which options selected, what needs they met for the participant? Did the delivery company comply?*  *If none, were they aware of any options, why not used?*   * **What other options would you have liked to have been offered to meet your needs?**   *Probe on what the needs are and relative importance of urgency, certainty (being able to track the parcel), secure delivery, safe delivery.* |
| **Section 2c Experience of parcel receipt**  ***Did the delivery meet their needs?***  ***What elements are spontaneously mentioned?*** | * **Can you describe to me the experience of receiving the parcel itself?**   *Encourage participant to tell the story of the delivery to play back the context and importance of aspects of the experience to them. Prompt for whether they saw the courier, whether the courier was in a branded van/uniform or not, where delivery was taken, what kind of delivery confirmation taken, difficulties lifting the parcel, any further contact with the company?*  ***Probe for story if the contents were noted as not in good condition in pre-task***   * **And if you were to receive that type of delivery again, what would you change to make it a better service for you?**   *Probe for best experience/ideal scenario, why say that, was it another parcel delivery company, what needs are not being met by current services?* |
| **Section 2d**  **Typical parcel receipt experiences, wider context, impact of EU Exit on NI participants** | * **How typical would you say that parcel delivery experience was for you?**   + Has this changed at all in the past year i.e. since the pandemic started have you been receiving different types of parcels? Has your choice of delivery option changed? Do you find you are receiving more/fewer parcels?   + How much does it differ by company (i.e. Royal Mail vs other brands)? * *For NI participants only,* **how have parcel deliveries been for you since the start of 2021**? *Moderator listen out for whether anything has changed and probe cost impact of customs charges, delays, marketplace sellers refusing to send to NI, impact on retail choices.* * **What other types of parcel do you typically receive?** *Moderator prompt as required to ensure a range of types are considered e.g. online shopping, gifts, medicines/health-related items, supplies/parts etc. Moderator make a note of each parcel/delivery type mentioned, asking for each:*   + Why do you choose for this to be delivered? (vs. picked it up in person/asked someone else to pick it up etc.)   + How important is it to you that you are able to have this type of parcel delivered to you?   + How would you feel if this couldn’t be delivered/there were problems with this being delivered?   + Has this changed in the past year (or stayed the same)? * **Thinking back over the past couple of years, what has been your worst experience of having a parcel delivered/or trying to receive a parcel?** *Moderator to allow participant to lead the story, probing as necessary to understand what happened, which company was involved, when it happened (pre/during pandemic), how they felt and what the impact was. Prompt NI participants to tell the full story of a recent delivery if apparent EU Exit impact.*   + In general, do you find that you have any particular problems with getting parcels delivered? *Probe any recurring issues and whether related to a specific service/courier or other reasons.*   **And have you ever decided not to buy something for delivery at all or chosen a different retailer to avoid a certain type of delivery?** *Probe whether avoiding hassle/cost of delivery altogether or avoiding certain companies? Who? Why? Anything specific to location for NI/rural?*   * **Is there anything you can think of that you don’t typically receive by parcel delivery but would like to? How does that affect you?** *Probe for what needed and what the barriers are* * **Once shops are all open again, do you think you will carry on receiving these types of parcel or will that change?** *Probe why will/won’t go back to pre-pandemic. NB. listen out for any mention of online retail taxes announced in the budget.* |
| **Section 2e**  **Overall sentiment about receiving parcels** | In total, thinking back over the last year or so:   * **How does the process of receiving parcels make you feel?** By process I mean the entire journey of the parcel, from ordering (if applicable) to despatch and delivery.   + *For Zoom interviews, moderator to share screen with a series of emojis and ask participant to pick one for sending, and one for receiving. For telephone interviews, moderator to read out a series of words, and ask participant to pick from these: stressed, relaxed, happy, anxious, overwhelmed, frustrated, indifferent*   + **And did you have a particular delivery company in mind when you said that?** *Probe what it is about that company that drives the emotion* |
| **Section 3: Sending parcels.**  **Section 3a Choice of delivery company**  ***How much choice is available and then what drives selection? Price, certainty, reliability, flexibility?*** | ***If participant has not sent a parcel in the past month or less than 10 mins left, skip to section 3d.***  I’d like to talk about your experience of sending parcels using one of the examples you’ve described in the diary we asked you to fill in. *Moderator refer to pre-task and agree which delivery to be discussed, note clearly what type of C2X this was. – friends and family, online return to a retailer, marketplace sale.*  *Use pre task responses to probe throughout on choice available and unmet need. Recap with participant on who parcel sent to, size, cost etc.*   * **I see you used [name of company] to send the parcel?** **Why did you select that company to deliver your parcel?**   *Probe on factors that affect choice (or lack of).*   * + *Only option for my location – if rural or NI probe more about limitations*   + *Purpose of delivery (e.g. personal shopping, business use, delivery from family/friends)*   + *Cost*   + *Convenient pick-up location (accessibility, opening times)*   + *Speed of delivery*   + *Familiarity*   + *Service quality*   + *Known delivery driver*   + *Tracking options* * **And how did you actually send the parcel?** *Probe if took to the post office, a collection point, doorstep collection* * **Did you speak to anyone in order to send it?** *Post office staff, courier?* |
| **Section 3b Options for sending the parcel**  ***What control did the service user have to track their parcel, be certain when it would be delivered, and flexibility if they needed to change this?*** | *Moderator review which options the participant was offered to send the parcel.*   * **I see you were offered [options] for this parcel delivery?**   *Probe which options selected, what needs they met for the participant? Did the delivery company comply?*  *If none, were they aware of any options, why not used?*   * **What other options would you have liked to have been offered to meet your needs?**   *Probe what the needs are and relative importance of urgency, certainty (being able to track the parcel), secure delivery, safe delivery* |
| **Section 3c**  **Experience of parcel arrival**  ***Did the delivery meet their needs?***  ***What elements are spontaneous-sly mentioned?*** | * **Do you know if the parcel arrived safely, on time and in good condition?**   *Probe on how kept track of parcel, did everything go to plan, any follow up?*   * **And if you were to send the same sort of parcel again, what would you change to make it a better service for you?** *Probe for previous positive/best experiences and ideal scenario, why say that, is it a different parcel company? What needs are not being met by current services?* |
| **Section 3d**  **Typical parcel sending experiences, wider context, impact of EU Exit on NI participants** | *Ask only of participants that have gone through sections 3a/b and c:*   * **How typical would you say that parcel sending experience was for you?**   + Has this changed at all in the past year i.e. since the pandemic started have you been sending different types of parcels? Has your choice of delivery option changed? Do you find you are sending more/fewer parcels?   + How much does it differ by company (i.e. Royal Mail vs other brands)?   *Ask all (including participants who have not sent parcels in the past month):*   * **What kinds of parcels do you typically send out (if any)?** *Moderator prompt particularly for business participants. Make a note of each parcel/delivery type mentioned, asking for each:*   + *Probe where applicable:*      - *Type of parcels sent for business*     - *Usual size of parcels – any particularly large/awkward requirements*     - *Whether they ever sell items they own via an online marketplace (e.g. second-hand items)*     - *How often they return items to retailers (if not - ask why they don’t do this)*     - *Any mention of items related to health condition / rural circumstances / that are sent as part of running business*     - *If do not send many/any probe for reasons*   + How important is sending parcels to you/your business?   + How would you feel if you couldn’t send these parcels/there were problems?   + Has this changed in the past year (or stayed the same)? * **Thinking back over the past couple of years, what has been your worst experience of sending a parcel/trying to send a parcel?** *Moderator to allow participant to lead the story, probing as necessary to understand what happened, which company was involved, when it happened (pre/during pandemic), how they felt and what the impact was.*   **And have you ever decided not to send a parcel because of the way it would be delivered or the cost?** *Probe especially for context for NI and rural participants, what was the alternative?*   * **Is there anything you can think of that you don’t send by parcel delivery but would like to? How does that affect you?** *Probe for what needed and what the barriers are* * **Once things are back to normal after the pandemic, do you think you will carry on sending these types of parcel or will that change?** *Probe why will/won’t go back to pre-pandemic patterns. NB. listen out for any mention of online retail taxes announced in the budget.* |
| **Section 3e**  **Overall sentiment about sending parcels** | In total, thinking back over the last year or so:   * **How does the process of sending parcels make you feel?**   + *For Zoom interviews, moderator to share screen with a series of emojis and ask participant to pick one for sending, and one for receiving. For telephone interviews, moderator to read out a series of words, and ask participant to pick from these: stressed, relaxed, happy, anxious, overwhelmed, frustrated, indifferent*   + *If the response is negative, probe as to whether this has prevented parcel sending at all.*   + **And did you have a particular delivery company in mind when you said that?** *Probe what it is about that company that drives the emotion.* |
| **Section 4**  **Sentiment overall about parcel delivery companies for receiving and sending** | * **And in total, how well do you think delivery companies take into account [*ask as relevant*]:**   + Your needs as someone with a health condition/disability? *Probe as relevant on ability to: go to a post office/collection point; hear someone at the door; answer the door; lift heavy objects.*   + Your needs as an older person? *[mobility as above, reliance on online services]*   + Your needs as a small business?   + Your needs as someone in a rural area? *Probe as relevant on: Delivery providers not covering your address / charging extra to come to your address; nearest parcel collection points being far away / having limited transport options for these***;** *needs as someone with a shared entrance*   + *Probe for what sort of services do take their needs into account well.* * *Phrase according to whether have used RM or other company?* **And how would you say that company and other parcel companies (Hermes, DPD, Amazon Prime, Yodel, UPS) compare to Royal Mail?** *Probe what perceptions are surfacing from the interview as most important?, are they more/less reliable? Provide more/less certainty? More provision for accessibility needs? More flexible?*   *Does perception vary according to whether receiving or sending a parcel or is it the same?*   * [IF PARTICIPANT HAS MENTIONED VARIATION BETWEEN PROVIDERS]: **You've mentioned that you've noticed differences between providers. If you were in charge, would you want to set any minimum rules for all parcel providers?**   + *Probe if needed:* For example, rules that said: they have to deliver to the named person; or only to an agreed safe place; or rules about making sure you can request e.g. that they allow you enough time to get to the door, etc. The rule can be anything you think is important (or you might not want any rules at all). *Moderator to prompt with any issues mentioned previously.* * **And would you like that to apply those rules even if the price of delivery *increased*?** |
| **5 Long term ideal world and wrap up** | **We’ve talked today about what improvements parcel delivery services could make to meet your needs and how you might use parcel services once the pandemic is over? Is there anything we haven’t covered that would really make parcel delivery services work for you?**  *Probe to think ideal world, ultimate customer experience*  **And just finally, thinking further into the future as technology develops. Can you imagine new ways of delivering parcels? Would that suit you better?**  *Explore if spontaneous mention of drones, home design with secure parcel boxes, more competition/less competition for RM*  *Moderator to thank participant, explain next steps and incentive payment.* |

## 10.2 Research sample

As noted in the introduction, this research included 40 participants across 3 core service user types, who represented a cross-section of different sampling criteria.

In addition to the details captured in the tables below:

* Participants were purposively selected to feel reliant on parcel services and to have recent experience of parcel receiving and sending. All had received at least one parcel in the last month.
* Those who had **access requirements** were recruited on the basis of having a disability, and/or long-term limiting mental or physical health condition associated with later life, as well as having difficulty completing activities associated with sending/receiving parcels.
* **Rural** participants were asked to self-define the type of area they live in. **Deep rural** participants were defined as such on the basis of living in an area with less than 2,000 people, more than 10 miles to the nearest other settlement.
* Some service users belonged to more than one service user type, as follows:
  + Four rural service users also had access requirements
  + Six microbusinesses were based in rural areas
  + One microbusiness had access requirements

**Table 1: service user types included in the research sample**

|  |  |  |
| --- | --- | --- |
| **Service user type** | **Number of participants** | **Additional criteria met in this service user group** |
| Has access requirements | 20 | * 17 who had sent a parcel in the last month * 20 who had received a parcel in the last month * Mix of health conditions:   + 3 x physical and mental health conditions   + 15 x physical conditions   + 2 x mental health conditions |
| Lives in a rural / deep rural area | 21 | * 14 who had had sent a parcel in the last month * 20 who had received a parcel in the last month * 4 living in ‘deep’ rural areas |
| Runs a micro-business | 10 | * 7 who had sent a parcel in the last week as part of business * 9 who had received a parcel in the last week * Mix of business sizes:   + 5 x sole traders   + 3 x 1-3 employees   + 1 x 4-9 employees |

**Table 2: other criteria featured in the recruitment sample**

|  |  |
| --- | --- |
| **Location** |  |
| England | 20 |
| Scotland | 6 |
| Wales | 6 |
| Northern Ireland | 8 |
| Urban / semi-urban | 19 |
| **Social grade** |  |
| AB | 8 |
| C1 | 11 |
| C2 | 9 |
| DE | 12 |
| **Age** |  |
| 16-25 | 4 |
| 26-59 | 26 |
| 60-79 | 6 |
| 80+ | 4 |
| **Gender** |  |
| Male | 17 |
| Female | 22 |
| Non-binary | 1 |
| **Ethnicity** |  |
| Minority ethnic group | 5 |
| **Additional criteria** |  |
| Online marketplace sellers | 12 |
| Returned an online purchase to a retailer in the last month | 22 |
| Shared entrance hall | 5 |
| No internet access or very limited digital skills | 9 |
| Not owning or using a mobile phone | 1 |

1. By detriment, we mean any harm or damaged experienced from dealing with parcel services. [↑](#footnote-ref-2)
2. All were targeted on the basis of feeling ‘very’ or ‘fairly’ reliant on parcel services, and having received and/or sent a parcel in the past month (or for micro businesses, in the past week). [↑](#footnote-ref-3)
3. All participants in this group self-identified as having an access requirement as a result of the characteristics noted above. [↑](#footnote-ref-4)
4. Jigsaw for Ofcom (2020) [UK Postal Users Research Quantitative Research Report](https://www.ofcom.org.uk/__data/assets/pdf_file/0018/208215/2020-review-of-postal-user-needs-quantitative-report.pdf), [UK Postal User Needs Qualitative Research Report](https://www.ofcom.org.uk/__data/assets/pdf_file/0017/208214/2020-review-of-postal-user-needs-qualitative-report.pdf), [Postal Needs Follow up Summer 2020 Research](https://www.ofcom.org.uk/__data/assets/pdf_file/0019/208216/2020-review-of-postal-user-needs-summer-research.pdf) [↑](#footnote-ref-5)
5. All participants in this group self-identified as having an access requirement as a result of their age, disability, health condition or impairment. [↑](#footnote-ref-6)
6. Ofcom (2018-19: p. 2) [Annual monitoring update on the postal market](https://www.ofcom.org.uk/__data/assets/pdf_file/0028/186139/annual-monitoring-update-postal-market-18-19.pdf) [↑](#footnote-ref-7)
7. Ofcom (2020: p. 21) [Review of postal users’ needs](https://www.ofcom.org.uk/research-and-data/post-research/review-of-user-needs) [↑](#footnote-ref-8)
8. Ofcom (2020: p. 17) [Review of postal users’ needs](https://www.ofcom.org.uk/research-and-data/post-research/review-of-user-needs) [↑](#footnote-ref-9)
9. Jigsaw for Ofcom (2020) [UK Postal Users Research Quantitative Research Report](https://www.ofcom.org.uk/__data/assets/pdf_file/0018/208215/2020-review-of-postal-user-needs-quantitative-report.pdf), [UK Postal User Needs Qualitative Research Report](https://www.ofcom.org.uk/__data/assets/pdf_file/0017/208214/2020-review-of-postal-user-needs-qualitative-report.pdf), [Postal Needs Follow up Summer 2020 Research](https://www.ofcom.org.uk/__data/assets/pdf_file/0019/208216/2020-review-of-postal-user-needs-summer-research.pdf) [↑](#footnote-ref-10)
10. Ofcom (2020) Press release, 26th November 2020 “[Review of postal users’ needs](https://www.ofcom.org.uk/postal-services/information-for-the-postal-industry/monitoring_reports)” [↑](#footnote-ref-11)
11. [Further detail on this legislation](https://www.legislation.gov.uk/ukpga/2011/5/part/3/crossheading/postal-operators-generally). [↑](#footnote-ref-12)
12. https://www.ofcom.org.uk/\_\_data/assets/pdf\_file/0024/215664/call-for-inputs-review-of-postal-regulation.pdf [↑](#footnote-ref-13)
13. For ease of reference and consistency we have used the term ‘service users with access requirements’ to mean individuals who self-identify as having a disability, health condition, impairment or physical characteristic which means they might need additional support in order to send and/or receive parcels. [↑](#footnote-ref-14)
14. Ofcom, (2021) [Residential postal tracker](https://www.ofcom.org.uk/__data/assets/excel_doc/0029/214589/Residential-postal-tracker-Q1-Q4-2020-tables.xlsx) [↑](#footnote-ref-15)
15. All participants in this group self-identified as having an access requirement as a result of the characteristics noted above. [↑](#footnote-ref-16)
16. Jigsaw for Ofcom (2020) [UK Postal User Needs Qualitative Research Report](https://www.ofcom.org.uk/__data/assets/pdf_file/0017/208214/2020-review-of-postal-user-needs-qualitative-report.pdf), [Postal Needs Follow up Summer 2020 Research](https://www.ofcom.org.uk/__data/assets/pdf_file/0019/208216/2020-review-of-postal-user-needs-summer-research.pdf) [↑](#footnote-ref-17)
17. Fieldwork was conducted in March 2021 shortly after the end of the EU Exit transition period. [↑](#footnote-ref-18)
18. Scottish, Welsh and English experiences are not reported on separately as they tend to be the same, as far as EU Exit is concerned. Recruitment of rural service users was prioritised in Wales and Scotland and these experiences are reported on throughout. [↑](#footnote-ref-19)
19. HMRC rules allow businesses to claim customs and excise relief on returned goods which are largely unaltered.  [↑](#footnote-ref-20)
20. [https://www.citizensadvice.org.uk/about-us/our-work/policy/policy-research-topics/post-policy-research-and-consultation-responses/post-policy-research/accessibility-at-post-offices/](https://www.citizensadvice.org.uk/about-us/our-work/policy/policy-research-topics/post-policy-research-and-consultation-responses/post-policy-research/accessibility-at-post-offices/%20%20)  [↑](#footnote-ref-21)