



Qualitative study on the impact on consumers of changes to Royal Mail's Universal Service Obligation

November 2024

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1. Executive summary

To build on its existing evidence base, the Consumer Council is carrying out dedicated research in 2023/2024 to understand how any potential changes to the universal postal service obligation would impact consumers in Northern Ireland. The universal postal service obligation requires, Royal Mail as the designated universal service provider, to deliver letters six days a week (Monday to Saturday) and parcels five days a week (Monday to Friday) to every address in the UK, at an affordable price that is uniform throughout the UK.

Cognisense was appointed to administer 11 focus groups between October and November 2023 (with each group representing one of Northern Ireland's local government districts (LGD), the purpose of which was to facilitate in-depth discussions to help identify any issues that potential changes to the universal postal service may present for consumers in Northern Ireland.

Some of the key findings from the focus groups are detailed in this section of the report.

Perceptions of Royal Mail

- For those living in rural locations, those currently not working and those who felt isolated, the postal delivery person was the face of Royal Mail and many of the perceptions of the organisation were driven by them.
- For some more vulnerable participants, there was an emotional connection with their postal delivery person, who may be the only person they see on a particular day, an interaction to which they looked forward.
- Among many participants from rural areas, there was a sense of community surrounding the Post Office helping to demonstrate the important role that post offices play to access the universal postal service.

The cost of living crisis and reliance on Royal Mail

- Across the focus groups, the cost of living crisis was a common concern. They were concerned that Royal Mail prices had increased significantly, in particular the cost of stamps.
- There were suggestions among participants that there ought to be special rates across the various universal postal services, in addition to the existing price cap, for those of retirement age, the unemployed, and those with disabilities.
- Across the focus groups, there were individuals who were earning extra income by selling products on Vinted and eBay. The reliability and affordability of Royal Mail was important to them as they would receive negative reviews from customers if packages were not delivered within the timeframe that had been specified.

- Some of those in the focus groups who were students felt that if Royal Mail reduced prices for packages they would be more inclined to return unwanted and unsuitable goods that they had purchased.

Understanding and importance of Royal Mail's universal service obligation

- When prompted with what the universal service obligation entails, most felt that they were aware of the requirement to deliver and collect letters at least once Monday to Saturday.
- Having uniform prices throughout the UK and the same service standards was positively received across the focus groups. Many participants discussed some courier companies charging more for delivery to Northern Ireland than other parts of the UK following Brexit. Many had also experienced some companies not delivering to Northern Ireland at all after Brexit. Royal Mail was thought to be protecting the Northern Ireland consumer with their uniform pricing obligation.
- The most important obligations were considered the frequency of delivery and collection of letters and parcels.
- For older participants and those with disabilities, the frequency of letter delivery and collection was most important. This was primarily due to the number of medical appointments they were receiving via post.
- For younger participants and those shopping online frequently, parcel collection and delivery was considered more important than letters.

What Royal Mail is used for

- When participants were asked what they used Royal Mail for, sending and receiving letters/cards and sending and receiving packages were the most frequently utilised services.
- Participants tended to use 1st Class services, despite them being more expensive than 2nd Class. There was a strong perception that 1st Class no longer meant delivery the following day as it had in the past, with many feeling that 1st Class was more likely to be delivered within the timeframe of what 2nd Class used to be (two to three days), if not longer. There was a sense that trying to get a letter delivered within a working week was a risk with 2nd Class.

Benefits of the universal postal service

- Across the groups, participants felt that the main benefits of the universal postal service were its frequency, convenience and general reliability.
- The frequency of the service was essential for those who received a significant number of medical appointments through the post.
- Across the focus groups, participants appreciated the convenience of being able to drop packages at a Post Office and know they would be collected promptly.

- While many participants had noted a decline in reliability regarding the length of time it took for letters and packages to be delivered, Royal Mail was still generally considered to be more reliable than most courier companies.

Universal service obligation pricing

- Uniform pricing across the UK was considered very important by participants, particularly by those selling items online.
- It was also important that the Northern Ireland consumer did not feel they were treated differently because of which part of the UK they lived in. Since Brexit, some discussed concerns because companies they had purchased from previously were now refusing to ship to Northern Ireland. These individuals were reassured that Royal Mail would never differentiate between different parts of the UK when it came to pricing.
- The rising cost of stamps, over the years, was preventing some older participants from using the universal postal service.

Attitudes towards potential changes to the universal service obligation

- For many participants, it was felt that a reduction in the frequency of letter delivery and collection would have an adverse impact on the reliability of a service which had not recovered fully from the effects of the COVID-19 pandemic.
- There was particular concern for some about the impact a reduction of frequency of letter delivery and collection would have during the Christmas period, a time when delays were already expected.
- Those who received a significant number of letters for medical appointments were concerned that a reduction in letter delivery and collection could lead to a delay in receiving appointment notifications and could cause appointments to be missed.
- Some participants with disabilities suggested that the reduction in the frequency of letter delivery and collection would have an impact on their mental health as they did not get out much and therefore looked forward to the post arriving because they knew the postal delivery person and often it was their only daily interaction with another person.
- Across the focus groups, there was some concern that a one day reduction in letter delivery and collection would quickly lead to a two day reduction and so on.
- In terms of parcels, the impact of a reduction in delivery and collection would be felt acutely by younger participants who regularly ordered items from websites that used Royal Mail for delivery.
- Those who were selling items online to make additional money would also be negatively impacted by a reduction in delivery and collection. These individuals were worried about negative feedback and reviews if a buyer received their parcel late.

- Most participants felt that the primary reason for potential changes to delivery and collection frequency was cost saving and not meeting consumer needs.
- Across the groups, there was a sense of frustration at the idea of prices increasing, but the frequency of delivery and collection decreasing.
- The current frequency of delivery and collection matched their needs. However, any potential reduction in the frequency of delivery and collection would feel like a backward step rather than an evolution to meet consumers' needs

2. About the Consumer Council

The Consumer Council is the statutory consumer representative body for Northern Ireland, responsible for protecting, empowering consumers and representing consumers, promoting their interests.

We operate under our sponsor department, the Department for the Economy (DfE), on behalf of the Northern Ireland Executive.

We are an insight-led evidence-based organisation:

- Providing consumers with expert advice and confidential guidance.
- Engaging with government, regulators and consumer bodies to influence public policy.
- Empowering consumers with the information and tools to build confidence and knowledge.
- Protecting consumers by investigating and resolving consumer complaints under statutory and non-statutory functions.
- Undertaking best practice research to identify and quantify emerging risks to consumers.
- Campaigning for market reform as an advocate for consumer choice, welfare and protection.

Our statutory powers cover consumer affairs, energy, transport, water and sewerage, postal services and food affordability and accessibility.

These legal responsibilities are drawn from legislation, licences given to companies working in Northern Ireland, and cooperation agreements set in memorandums of understanding. The work we carry out also aligns with a number of the Articles in the Protocol on Ireland and Northern Ireland¹ (NI Protocol).

Our non-statutory functions educate, empower and support consumers against discriminatory practices in any market through advocacy work, as well as education and outreach programmes covering a broad range of topics including promoting consumer rights, financial inclusion and a more sustainable energy future.

We serve Northern Ireland's 1.9 million citizens and champion consumers in everything we do. We prioritise those who are disabled or chronically sick, who are of pensionable age, who are on low incomes and who live in rural areas.

We are a designated body under the Rural Needs Act 2016 and Section 75 of the Northern Ireland Act 1998. In this role, we aim to ensure government policies recognise consumer needs in rural areas and promote equality of opportunity and good relations across a range of equality categories.

¹ [Protocol on Ireland and Northern Ireland](#), House of Commons Library

3. About this research

Universal service obligation (USO) sets out that Royal Mail must provide a six-day-a-week, one-price-goes-anywhere postal service to the 32 million United Kingdom (UK) addresses. A universal postal service must, as a minimum, include² the following:

1. Delivery of letters or other postal packets. At least one delivery of letters every Monday to Saturday; at least one delivery of other postal packets every Monday to Friday.
2. Collection of letters or other postal packets. At least one collection of letters every Monday to Saturday from every access point in the UK used for the purpose of receiving postal packets, or any class of them, for onwards transmission in connection with the provision of a universal postal service; at least one collection of other postal packets every Monday to Friday from every access point in the UK used for that purpose.
3. Service at affordable prices in accordance with a uniform public tariff. A service of conveying postal packets from one place to another by post (including the incidental services of receiving, collecting, sorting and delivering them) at affordable prices determined in accordance with a public tariff which is uniform throughout the UK.
4. Registered items service. A registered items service at affordable prices determined in accordance with a public tariff which is uniform throughout the UK.
5. Insured items service. An insured items service at affordable prices determined in accordance with a public tariff which is uniform throughout the UK.
6. Services to blind or partially sighted. The provision free of charge of such postal services as are specified in the universal postal service order to such descriptions of blind or partially sighted persons as are so specified.
7. Legislative petitions and addresses. A service of conveying free of charge qualifying legislative petitions and addresses.

To build on its existing evidence base, the Consumer Council is carrying out dedicated research in 2023-2024 to allow us to understand and assess the impact of potential changes to the universal postal service obligation on consumers that use and/or rely on the services, and what impact a reduction in services would have on these consumers.

Cognisense was appointed to administer focus groups between October and November 2023, the purpose of which was to facilitate in-depth discussions to help identify any issues surrounding the reduction in Royal Mail services, as well as how Royal Mail currently meets consumer needs and how they can meet consumer needs in future.

² <https://www.legislation.gov.uk/ukpga/2011/5/part/3/crossheading/the-universal-postal-service>

To meet the research objectives identified, 11 focus groups (78 participants in total) were conducted online between October and November 2023, with each group representing one of Northern Ireland's local government districts (LGD). The breakdown of each group was as follows:

Group	Life stage	Age	SEG*	LGD	Date
1	Singles	18 to 24	AB	Antrim & Newtownabbey Borough Council	8th November
2	Young families	25 to 34	C2	Ards & North Down Borough Council	26th October
3	Older families	35 to 49	DE	Armagh City, Banbridge & Craigavon Borough Council	7th November
4	Empty nesters	50 to 64	C1	Belfast City Council	18th October
5	People with disabilities	N/A	DE	Causeway Coast & Glens Borough Council	10th November
6	Empty nesters	65 or older	DE	Derry City & Strabane District Council	27th October
7	Young families	25 to 34	C1	Fermanagh & Omagh District Council (Rural residents only)	19th October
8	Empty nesters	50 to 64	AB	Lisburn & Castlereagh City Council	7th November
9	Singles, including at least two individuals with a disability	18 to 24	C2	Mid & East Antrim Borough Council	8th November
10	Empty nesters	65 or older	C2	Mid Ulster District Council	24th October
11	Older families, including at least two individuals with a disability	35 to 49	C1	Newry, Mourne & Down District Council (Rural residents only)	23rd October

*Socio-economic group (SEG) is a means of classifying respondents based on the employment status, occupation and working pattern (full-time/part-time) of the head of household. There are six socio-economic grades: A, B, C1, C2, D and E. For the purposes of this project, grades A and B were combined, as were grades D and E.

All group participants sent and received letters and/or parcels regularly (at least monthly).

Two of the groups (Fermanagh & Omagh, Newry, Mourne & Down) focused solely on rural residents. All other groups contained a mix of rural and urban residents.

Four groups were made up of vulnerable people, with a further two groups including at least two vulnerable people. A vulnerable person was defined as someone who met at least one of the following criteria:

- disabled or chronically sick
- of pensionable age
- on a low income

All research was carried out in accordance with the Market Research Society's Code of Conduct.

4. Findings

This section of the report details the main findings from the focus groups.

4.1 Awareness of Royal Mail and its role in delivering the USO

Among older participants, there was a familiarity that surrounded Royal Mail as it was a service they had known all their lives.

"I grew up with Royal Mail." (Empty nester, 50 to 64, C1, Belfast)

"A national service that has been around for my whole life." (Empty nester, 65 or older, DE, Derry City & Strabane)

"Royal Mail is an institution." (Empty nester, 50 to 64, C1, Belfast)

A significant proportion of participants noted a decline in reliability since the onset of the COVID-19 pandemic. The negative impact of reduced reliability on hospital appointments was highlighted by participants, which underlines the importance of the letter service Royal Mail provides.

"They used to be more reliable. You could set your watch by them. Not the case anymore." (Empty nester, 50 to 64, AB, Lisburn & Castlereagh)

"I get a lot of hospital appointments and I've noticed recently that I get them sometimes a week after the date they were posted." (People with disabilities, DE, Causeway Coast & Glens)

There was some confusion among older participants as to whether Royal Mail was still a public service or whether it had become a private company. Younger participants were less likely to consider Royal Mail a public service because few recalled it ever being one.

Among those who considered Royal Mail to be a public service, expectations of it were higher as they thought it was being paid for by the taxpayer.

"Royal Mail is paid through our taxes." (Empty nester, 65 or older, C2, Mid Ulster)

For those living in rural locations, those currently not working and those who felt isolated, the postal delivery person was the face of Royal Mail and many of the perceptions of the organisation were driven by them. These participants tended to know when their post would be delivered and they watched out for the delivery person, being on first name terms in most cases. For urban residents, perceptions of Royal Mail were often based on the person they came into contact with at the Post Office counter. This indicates the vital role of post offices to access the universal postal service despite the Post Office and Royal Mail being separate organisations.

"Gerard delivers my post around 3pm every day." (Empty nester, 65 or older, DE, Derry City & Strabane)

"John is great. If I'm not in he knows where to leave my parcels." (People with disabilities, DE, Causeway Coast & Glens)

For some more vulnerable participants, there was an emotional connection with their postal delivery person, who may be the only person they see on a particular day, an interaction to which they looked forward. This helps to demonstrate the social value of the universal post service.

"I look forward to seeing John and I like getting a bit of post." (People with disabilities, DE, Causeway Coast & Glens)

Among many participants from rural areas, there was a sense of community surrounding the Post Office. The staff were considered knowledgeable about the products and services, were felt to be able to offer advice on the most appropriate and cost-effective means of utilising these products and services and, in some cases, understood the individual's needs because they knew them personally. Again, this illustrates the strong connection between the rural post office network and access to the universal postal service.

"I know the ones that work behind the counter. Always have a chat with them when I'm in." (Older families, 35 to 49, C1, Newry, Mourne & Down)

Among younger participants, Royal Mail was considered traditional and somewhat old-fashioned. All of these participants were aware of the organisation and there was a sense that it had been around for a very long time. However, these participants tended to prefer courier companies to deliver and return parcels on the basis that they delivered next day and collected packages from their homes. Younger participants tended to insist upon speed and hope for reliability. There was evidence to suggest that if Royal Mail could guarantee next day delivery, these younger people would be more likely to utilise their services. This indicates that reliability issues with Royal Mail are having a negative effect on this group and this may offset any benefits provided by Royal Mail's parcel collect service.

"I can't be bothered bringing things to the Post Office. Courier companies collect from your door." (Singles, 18 to 24, C2, Mid & East Antrim)

4.2 Understanding and importance of Royal Mail's universal service obligation

When asked to confirm their understanding of Royal Mail's universal service obligation, there was little familiarity among participants.

When prompted with what the universal service obligation entails (see section 3), most felt that they were aware of the requirement to deliver and collect letters at least once Monday to Saturday. In terms of the collection and delivery of other postal packets, some recalled receiving packages on a Saturday and therefore, thought it mirrored the letter obligation of six days a week.

"I knew about the letters and parcels." (Young families, 25 to 34, C2, Ards & North Down)

"I think we have got parcels on a Saturday. I thought that was the same as letters." (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

There was no awareness among participants of the obligation to provide the services at affordable prices determined in accordance with a public tariff which is uniform throughout the UK. While there was limited understanding of what 'in accordance with a public tariff' might mean, most participants were reassured by 'affordable' prices and considered this an important obligation for a service that many people could not do without.

"Prices need to be affordable because we have to use it, but it could be cheaper." (Empty nester, 50 to 64, C1, Belfast)

However, there were some participants that felt that price increases should be anticipated, given the rising costs of other products and services.

"You expect their prices to go up. Everyone else's are." (Young families, 25 to 34, C1, Fermanagh & Omagh)

Having uniform prices throughout the UK and the same service standards was positively received across the focus groups. Many participants discussed some courier companies charging more for delivery to Northern Ireland than other parts of the UK following Brexit. Many had also experienced some companies not delivering to Northern Ireland at all after Brexit, which was frustrating for them and made them feel like 'second class citizens'. Royal Mail was thought to be protecting the Northern Ireland consumer with their uniform pricing obligation and this was appreciated. This helps to demonstrate the importance of the universal postal service to all consumers now and in the future.

"Since Brexit, we have been treated differently. Some companies won't even deliver to us. Good that Royal Mail will." (People with disabilities, DE, Causeway Coast & Glens)

All participants were aware of the registered service, and all had used it at some point. For older participants, it was an important service when they needed to send official documents, such as passports, driving licenses and birth certificates; younger participants tended to use the service for returning items and for posting goods they had sold.

"I always use that if I have to send a document I can't afford to lose." (Empty nester, 50 to 64, AB, Lisburn & Castlereagh)

"That's how I send things I have sold. I need to know they have been delivered." (Singles, 18 to 24, C2, Mid & East Antrim)

Some participants were aware of the insured items service but few had used it. Those who had tended to be older and utilised it primarily to send cash to relatives.

The provision of free of charge services for blind/partially sighted persons was not familiar to any of the participants; however, it was considered to be a positive obligation.

"I haven't heard this before but it's a good thing." (Empty nester, 50 to 64, AB, Lisburn & Castlereagh)

There was no awareness among participants of the obligation to send legislative petitions and addresses free of charge.

The most important obligations were considered the frequency of delivery and collection of letters and parcels. Which service was most important varied depending on life stage and individual circumstances. For older participants and those with disabilities, the frequency of letter delivery and collection was most important. This was primarily due to the number of medical appointments they were receiving via post. A suitable lead in time for appointments was needed by many of these participants so that they could make the arrangements required to attend, such as organising transport. In recent months, delays in receiving these letters were noticed and, in some cases, appointments had been missed. This highlights the detriment caused by unreliable letter deliveries. These individuals also tended to be less technologically savvy and were unlikely to have ticked the 'paperless' options offered to them by utility companies and banks. It was clear these individuals rely on the universal postal service.

"The letters would be most important for me. I like to get my bills and statements so I can file them." (Empty nester, 50 to 64, AB, Lisburn & Castlereagh)

"I get a lot of hospital appointments so need to know when they are. I need a bit of time to arrange for my son to bring me. He works." (People with disabilities, DE, Causeway Coast & Glens)

For younger participants and those shopping online frequently, parcel collection and delivery was considered more important than letters. Such individuals were more likely to receive correspondence via email or online because they opted for 'paperless' alternatives where possible. They also received fewer official documents and medical appointments than older participants and those with disabilities. These individuals wanted to receive goods they ordered in a timely manner and, when returning unsuitable items, they wanted to be able to drop them off at their local Post Office and have them returned as soon as possible. This meant getting a refund faster and with the current cost of living crisis, this was important.

"I don't get a lot of letters, but I am always ordering stuff online." (Singles, 18 to 24, C2, Mid & East Antrim)

4.3 Benefits of the universal postal service for consumers

Across the groups, participants felt that the main benefits of the universal postal service were its frequency, convenience and general reliability.

The frequency of the service was essential for those who received a significant number of medical appointments through the post. These individuals depended on the frequency of delivery to ensure they did not miss any set appointments and to give them time to make the arrangements required to attend them.

The frequency of the service was considered a particular benefit during busy periods, such as Christmas. Participants recognised that delays at this time were inevitable, but with the frequency of deliveries and collections, they were hopeful that their items would arrive within the week.

The frequency of the service was very important to both those selling items online and those purchasing items online, with the former only receiving payment for the goods they had sold once they were delivered, and the latter stating a desire to know that products ordered would arrive within the timeframes specified.

Across the focus groups, participants appreciated the convenience of being able to drop packages at a Post Office and know they would be collected promptly. Many of those working full-time acknowledged the convenience of some Post Office locations and the opening hours that they kept, which enabled packages to be dropped off after work and on a Saturday.

"It's good that the Post Office is now in the likes of the Eurospar. It's open later and at the weekends. You can drop things off after work or at the weekend." (Older families, 35 to 49, C1, Newry, Mourne & Down)

Some of the participants from rural areas mentioned the convenience of being able to leave packages out for their Royal Mail postal delivery person to collect. This was of particular benefit for those who found it difficult to make it to the Post Office to drop packages off. These individuals tended to have caring responsibilities or a disability that made it challenging for them to leave their homes.

"My postman picks my parcels up so I don't need to leave them to the Post Office. It's great." (People with disabilities, DE, Causeway Coast & Glens)

While many participants had noted a decline in reliability regarding the length of time it took for letters and packages to be delivered, Royal Mail was still generally considered to be more reliable than most courier companies. Familiarity with the postal delivery person was an influencing factor for many with this view, particularly those in rural areas, where it was more likely for the postal delivery person to be known by name and for the postal delivery person to know a participant's home and habits, recognising safe places to leave packages if no one was there. Some participants had experience of courier companies leaving packages in unsecure areas, at the wrong address or somewhere inappropriate. In some cases, packages had never been received and in other instances it took some additional time and increased hassle to locate and retrieve their items.

"A courier left a parcel of mine in the blue bin. Only found it by chance." (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

For many participants, the perceived decline in reliability was attributed to the impact of COVID-19, with there being a sense that postal service staff levels had been cut during the pandemic and had not been replaced, leading to backlogs. Furthermore, it

was noted that postal delivery people had changed in some areas, being replaced by less experienced and less efficient individuals – a view particularly evident among urban residents.

"We have a different postman now and I don't think he is as good. He comes at all different times. I've had letters that weren't mine." (Empty nester, 50 to 64, C1, Belfast)

Some participants acknowledged an increase in letter delivery delays, apparent in many cases via the length of time between the date stamp on the letter and when it was actually received. Among those who received a high volume of medical letters, there were instances of missed appointments because they had not received the letter with enough advance notice of the appointment date. In addition to not benefitting from the appointment, there was concern about the possibility of multiple missed appointments leading to a discharge.

"I received a letter from hospital on the day of appointment. This has happened three times." (Older families, 35 to 49, C1, Newry, Mourne & Down)

As evidence of a decline in Royal Mail's reliability, one participant offered the following example:

"My wife received her fuel allowance letter two weeks ago and I still haven't got mine. We live at the same address. Why?" (Empty nester, 65 or older, DE, Derry City & Strabane)

In terms of the guaranteed next day delivery service, some participants had tried to utilise it recently but were informed that Royal Mail could not deliver on their 'guarantee'. These individuals were aware that they could claim back the cost if an item was not delivered on time, but there was a sense of frustration at not receiving the full benefit of the service.

4.4 Consumers use of Royal Mail services and products

When participants were asked what they used Royal Mail for, sending and receiving letters/cards and sending and receiving packages were the most frequently utilised services.

When tracking was discussed, many of the younger participants mentioned that tracking information was not thorough enough with Royal Mail, especially when compared to courier companies. They commented on being able to check when a package was delivered and who signed for it, but not where it was at any given time.

"I don't think tracking is very good with Royal Mail. You can only tell when something has been delivered. With couriers, you can trace the journey if you want, so you know where the package is." (Young families, 25 to 34, C1, Fermanagh & Omagh)

Across the groups, guaranteed next day delivery was not a popular method of postage. It was regarded as expensive and although next day delivery was

supposedly guaranteed, some who had used it had had negative experiences, with items not being delivered on time and refund claims being required. The claims process was considered straightforward and efficient by those who used it, but some of these individuals had lost faith in the next day delivery service as a result of their experiences. This underlines the importance of the universal postal service and its specific requirements being reliable. There was a perception among some participants that the inability to deliver the following day in Northern Ireland has been the case since the onset of the COVID-19 pandemic, but that this was not the situation in other parts of the UK.

"I paid for it before and it never arrived, but I got the money back." (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

"I don't think we get the same service because they [consumers elsewhere in the UK] seem to be able to get next day delivery but we can't." (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

Participants tended to use 1st Class services, despite them being more expensive than 2nd Class. There was a strong perception that 1st Class no longer meant delivery the following day as it had in the past, with many feeling that 1st Class was more likely to be delivered within the timeframe of what 2nd Class used to be (two to three days), if not longer. There was a sense that trying to get a letter delivered within a working week was a risk with 2nd Class. They found it frustrating to be paying more for a service that was less reliable than what it was pre-pandemic. Given that prices had increased it was considered unfair.

"I use 1st Class because it isn't really what it used to be. 1st Class now takes the time 2nd Class used to. God knows how long 2nd Class would take." (People with disabilities, DE, Causeway Coast & Glens)

4.5 Universal service obligation pricing

Uniform pricing across the UK was considered very important by participants, particularly by those selling items online. As postage costs were known, sellers could factor them into their pricing of items for sale.

"You know how much it will cost to send it so you can make sure you have the money." (Singles, 18 to 24, C2, Mid & East Antrim)

It was also important that the Northern Ireland consumer did not feel they were treated differently because of which part of the UK they lived in. Since Brexit, some discussed sometimes feeling like 'second class citizens' because companies they had purchased from previously were now refusing to ship to Northern Ireland. These individuals were reassured that Royal Mail would never differentiate between different parts of the UK when it came to pricing.

Despite the current price cap on 2nd Class letters and small parcels, many participants acknowledged a significant jump in prices more generally since October 2023. Some were not surprised, given the rising costs of most products and services; others appreciated being given notice about increases so that they could stock up on the stamps they would require in the near future.

The rising cost of stamps, over the years, was preventing some older participants from sending as many Christmas cards as they once had, in some cases limiting the sending of cards only to people who they did not see regularly. It was noted by some that it costs more to send a card than it costs to buy one and they could not justify the expenditure amidst the cost of living crisis. Some of these individuals resorted to sending cards by hand to those who lived locally.

"I can't bring myself to post cards. It's just too expensive." (Empty nester, 65 or older, DE, Derry City & Strabane)

"You can buy a card for £1 then it costs £1.25 to send it. I just couldn't justify it." (Empty nester, 50 to 64, C1, Belfast)

The rising cost of stamps was less of an issue for younger participants, who tended to be more technologically savvy and were much more comfortable with the idea of sending messages online.

Regardless of the price cap, there were some calls, within the groups, for discounted prices for certain cohorts such as pensioners, those with disabilities and those currently unemployed. The continuation of the price cap was very important but ideally, this would work in conjunction with the discounted prices across the various universal postal services. However, the continuation of the price cap for the 2nd Class service was vital.

4.6 The cost of living crisis

Across the focus groups, the cost of living crisis was a common concern. They were concerned that Royal Mail prices had increased significantly, in particular the cost of stamps. Regardless of the price cap, there were suggestions among participants that there ought to be special rates across the various universal postal services, in addition to the price cap, for those of retirement age, the unemployed, and those with disabilities. They depended heavily on the services provided by Royal Mail and were worried, if prices continued to increase, they would not be able to afford to use the services.

"I think there should be a special price for pensioners." (Empty nester, 65 or older, DE, Derry City & Strabane)

Some participants felt that they were given advanced warning of price rises and could stock up on stamps before increases were implemented.

"You get a bit of notice so you can buy what you need before the price goes up." (Young families, 25 to 34, C2, Ards & North Down)

The small number of blind/partially sighted participants had no awareness of the free of charge Royal Mail services available to them (as specified in the universal service obligation). They were eager to find out how they could take advantage of this offering. This is an area where more can be done to promote this service.

"It would be good to know more about that." (People with disabilities, DE, Causeway Coast & Glens)

Across the focus groups, there were individuals who were earning extra income by selling products on Vinted and eBay. The reliability and affordability of Royal Mail was important to them as they would receive negative reviews from customers if packages were not delivered within the timeframe that had been specified. These individuals also commented on having to pay for postage upfront and being out of pocket until the package was delivered to the recipient. Given the current cost of living crisis, being out of pocket for extended periods of time was not sustainable for them.

"I sell stuff on Vinted for extra money and it would affect my star rating if something was late." (Singles, 18 to 24, AB, Antrim & Newtownabbey)

"When you are sending stuff you have to pay for postage and don't get it back until the parcel is delivered." (Young families, 25 to 34, C1, Fermanagh & Omagh)

Some of those in the focus groups who were students felt that if Royal Mail reduced prices for packages they would be more inclined to return unwanted and unsuitable goods that they had purchased. In some cases, individuals were retaining items that they did not want as the cost of returning packages was prohibitive. This helps to show the importance of price to consumers when sending parcels.

"It's so dear to send stuff back. Sometimes I end up keeping things because I haven't money to send it back." (Singles, 18 to 24, C2, Mid & East Antrim)

4.7 Attitudes towards potential changes to the universal service obligation

Participants were asked how they would be impacted by a reduction in letter delivery and collection from six days to five and a reduction in parcel delivery and collection from five days to four.

For many participants, it was felt that a reduction in the frequency of letter delivery and collection would have an adverse impact on the reliability of a service which had not recovered fully from the effects of the COVID-19 pandemic.

"Letters are slower getting to you now so it'd get worse." (Empty nester, 65 or older, DE, Derry City & Strabane)

There was particular concern for some about the impact a reduction of frequency of letter delivery and collection would have during the Christmas period, a time when delays were already expected.

Those who received a significant number of letters for medical appointments were concerned that a reduction in letter delivery and collection could lead to a delay in receiving appointment notifications and could cause appointments to be missed. Having less time to plan the logistics of appointments would make attendance more difficult and stressful; missing appointments could also lead to patient discharges despite still requiring medical help.

"My daughter has a condition and is at hospital quite a lot. We need plenty of notice of hospital appointments." (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

"Letters will have the biggest impact on me. I only get important, time-sensitive letters so need them to be delivered in a time-sensitive manner. If I miss more than one hospital appointment I could get discharged and go to the bottom of the waiting list." (Empty nesters, 50 to 64, AB, Lisburn & Castlereagh)

Some participants with disabilities suggested that the reduction in the frequency of letter delivery and collection would have an impact on their mental health as they did not get out much and therefore looked forward to the post arriving because they knew the postal delivery person and often it was their only daily interaction with another person.

Across the focus groups, there was some concern that a one day reduction in letter delivery and collection would quickly lead to a two day reduction and so on. This would exacerbate the issues for those who would be impacted by a one day reduction, while increasing the likelihood of negative effects for others.

"I don't think it would stop at one day." (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

Younger participants were much less inclined to feel that a reduction in letter delivery and collection would have an impact on them as many of them had opted for online 'paperless' alternatives where possible.

"I hate getting mail. I don't really get any." (Singles, 18 to 24, AB, Antrim & Newtownabbey)

"Always the paperless option for us." (Young families, 25 to 34, C1, Fermanagh & Omagh)

Many older participants were nervous about being forced to adopt online paperless alternatives to letters, worrying about missing bill payments, not being able to keep on top of their banking, and missing medical appointments as a result of not being able to get to grips with such systems. They were not confident in their ability to access letters online, with some not having any access at all.

"I wouldn't be able to work with things online. I need it on paper. I'm no good with computers." (Empty nester, 65 or older, DE, Derry City & Strabane)

Price increases were felt by many participants to be unjustified if the letter service offering was going to reduce, with a small number suggesting that prices should decrease to reflect a reduction in the frequency of letter collection and delivery.

"Would be ok if they'd reduce the prices too." (Singles, 18 to 24, C2, Mid & East Antrim)

In terms of parcels, the impact of a reduction in delivery and collection would be felt acutely by younger participants who regularly ordered items from websites that used

Royal Mail for delivery. These individuals tended to order items online that were needed for a particular date or event and seldom planned too far ahead, usually not factoring in time for potential delivery delays.

"If they reduce the number of days it will take longer than usual. Shein already takes a week so it'll be even longer." (Singles, 18 to 24, AB, Antrim & Newtownabbey)

Those who were selling items online to make additional money would also be negatively impacted by a reduction in delivery and collection. These individuals were worried about negative feedback and reviews if a buyer received their parcel late. Postage also had to be paid upfront and they were out of pocket until the buyer received the item they were purchasing. Significant delays would negatively impact them, particularly around busy periods when they were posting more items.

"I sell bits and pieces online for extra money. I depend on things being delivered on time so I don't get negative reviews." (Young families, 25 to 34, C1, Fermanagh & Omagh)

Some of the participants with older families discussed the frequency of parcels being delivered to their homes for their children. More deliveries inevitably meant more returns. The parents were often tasked with dropping off the returns to the Post Office and were inclined to let the parcels build up and return them once a week, for many on a Saturday. Although the parcels would be collected on a Monday, they suspected there would be a backlog with the reduced number of days and this would lead to a delay in items being returned, and therefore a delay in their children's refunds. Some also questioned whether the Post Office would take parcels as frequently if the number of collections were reduced.

"Our house never stops with parcels. I am the one who ends up returning them. I usually drop them to the Post Office on a Saturday. I bet there would be a backlog and they wouldn't end up being collected on Monday." (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

"They might not have space to store parcels if they aren't being collected the next day. They'd end up lying about our house and getting forgot about if they didn't take them on certain days." (Older families, 35 to 49, C1, Newry, Mourne & Down)

Older participants and those with disabilities tended to be less concerned about a reduction in parcel delivery and collection. These individuals did not shop online as frequently as younger participants and were content to wait a bit longer for an item. If they needed a product by a certain date, they would plan ahead and factor in time for delays.

"I don't mind waiting a day or two extra for something I ordered." (Empty nesters, 50 to 64, AB, Lisburn & Castlereagh)

Those participants intending to send Christmas presents to relatives abroad felt they would need to allow extra time in order for them to arrive. Some had experienced delays in previous years, with postal strikes cited as a contributing factor, and there

were questions as to how much longer items would take to arrive with a reduction in the frequency of delivery and collection.

"There are always delays at Christmas anyway. There always seems to be a strike. It'll get worse if this [reduction in frequency of delivery and collection] happens." (Empty nester, 50 to 64, C1, Belfast)

Across the groups, couriers were considered as an alternative to Royal Mail when it came to parcel delivery and collection, but as previously mentioned participants highlighted concerns about reliability. Many of the younger participants were already familiar with at least one courier company and knew how they worked, with Amazon Prime proving popular as a result of their next day delivery. Older participants and those with a disability tended to prefer to use Royal Mail because of their familiarity with the organisation and their systems. The staff at the Post Office was able to do any paperwork for them and advise them on the best method to use. Some worried about the paperwork involved with courier companies and where they would leave the parcels if they were not at home.

"I use couriers more than Royal Mail. I find them OK and easy to use. They will collect from the house." (Singles, 18 to 24, AB, Antrim & Newtownabbey)

"I wouldn't know how to use a courier. There'd be more paperwork." (People with disabilities, DE, Causeway Coast & Glens)

The majority of participants felt that the primary reason for potential changes to delivery and collection frequency was cost saving and not meeting consumer needs. Given some participants familiarity with Post Office staff as well as the Royal Mail postal delivery person, there was concern about people they knew and depended upon, losing their jobs as a result of the reduced frequency of delivery and collection.

'Probably trying to cut costs.' (Older families, 35 to 49, DE, Armagh City, Banbridge & Craigavon)

Across the groups, there was a sense of frustration at the idea of prices increasing, but the frequency of delivery and collection decreasing. The tolerance levels for a reduction in frequency would be higher if prices were also reduced.

"Wouldn't be as bad if they dropped prices as well." (Young families, 25 to 34, C2, Ards & North Down)

There was recognition among group participants that the Post Office had adapted to consumers' changing needs in order to stay relevant. Some participants regarded the Post Office as a one-stop shop, driven primarily by the fact they were now situated within stores, such as Eurospar, were open later and were more accessible in terms of opening hours/days and parking. This was appreciated given that they lead busy lives with many working full-time, caring for family, or those with disabilities depending on others who lead busy lives and could only help them outside of working hours. Opening after working hours was meeting their needs. The young people, in particular tended to leave things until the last minute and that included on-line shopping for particular occasions. The current frequency of delivery and collection matched their needs. However, any potential reduction in the frequency of

delivery and collection would feel like a backward step rather than an evolution to meet consumers' needs.

4.8 The postal service and climate change

The majority of participants claimed to be taking some action regarding climate change in other areas of their life, but when it came to their usage of Royal Mail services, they did not think about the environmental impact they were having. Most felt that they did enough elsewhere and would be unwilling to pay more or wait longer for items to be delivered with fewer CO2 emissions.

"We do recycle, but I don't think about the environment when I am doing my online shopping." (Young families, 25 to 34, C1, Fermanagh and Omagh)

One suggestion for reducing Royal Mail's impact on the environment was the use of electric vehicles for delivery, something a few participants mentioned that Amazon was already doing. However, there was acknowledgement that a lack of charging points would make the use of electric vehicles, especially in rural areas, very difficult.

"Could they change their vans to electric?" (Empty nester, 50 to 64, AB, Lisburn & Castlereagh)

5. Conclusions

For many older participants and those with disabilities, Royal Mail offered a familiar service they depended on for their mail. Many participants noted a decline in reliability of the service since the onset of the COVID-19 pandemic which had a negative impact on them such as missing hospital appointments.

There was concern that a reduction in the frequency of delivery and collection of letters may result in bills not being paid on time, banking not being managed effectively, and important hospital appointments potentially being missed. These individuals tended to be less confident with technology and were much less likely to have opted for 'paperless' alternatives for bills, bank statements and medical notices.

In terms of parcels, these individuals were less concerned with a reduction in the frequency of delivery and collection – they tended to be content to wait longer for parcels to arrive and planned ahead if they needed a delivery or collection for a certain date. These individuals preferred Royal Mail to courier companies, with some having had negative experiences with the latter and some finding them difficult to use. They considered Royal Mail more reliable, in terms of parcels being delivered to the correct address, but also, if they were not at home they could depend on the Royal Mail delivery person to leave their parcel in a safe and secure place. Some participants had previous complaints with courier companies leaving items at the wrong address, visible to passersby or in a location that was not obvious, such as their blue bin.

Younger participants tended to feel that Royal Mail was a traditional and old-fashioned organisation. They typically did not receive a lot of letters and preferred to access 'paperless' alternatives online. Therefore, a reduction in the frequency of letter delivery and collection would not have a significant impact on them.

However, these individuals would feel the impact of a reduction in the frequency of parcel delivery and collection. Those ordering from websites that used Royal Mail for delivery felt that they would have to wait longer for items to arrive, which was not ideal as they tended to order items that were needed for a particular date or event, seldom planning ahead or anticipating delays. Those selling items online were worried that a reduction in the frequency of delivery and collection of parcels could result in items not being delivered to their customers within specified timelines, which would delay their receipt of payment and which may incur negative reviews of their service provision.

Those who regularly returned unwanted items to online retailers were concerned that a reduction in the frequency of parcel delivery and collection could result in it taking longer for them to receive refunds, which would be a strain amidst the current cost of living crisis.

With the cost of living crisis a very prominent concern, they were conscious that Royal Mail prices, had increased significantly. In addition to the price cap, they would appreciate discounted prices across the various universal postal services for those of retirement age, the unemployed, and those with disabilities. These cohorts depended heavily on the services provided by Royal Mail and wanted to be able to afford to continue to use them.

Post Offices played an important role for the participants. The older participants, particularly those living in rural areas, knew the staff and enjoyed visiting the Post Office when they required the Royal Mail services. They trusted the staff to give them the correct advice on the most appropriate and cost effective method to use. Those with disabilities and those more vulnerable looked forward to a trip to the Post Office. For some, it was one of their only interactions and the staff made them feel valued. There was a real sense of community surrounding the Post Office in rural areas especially. For the younger participants and those working full time or with busier lifestyles, the accessibility of the Post Office was vital. They could use the services after they finished work and at weekends. This meant parcels were not left lying around the house and at risk of being forgotten about.

Participants were reassured that universal postal service would never differentiate between different parts of the UK when it came to pricing. This was felt more important now in the context of Brexit. Equally, there was the need for the same level of service across the UK.

The majority of participants felt that the primary reason for potential changes to the universal postal service was cost saving rather than meeting consumer needs. There was a sense of frustration at the idea of prices increasing, but the frequency of delivery and collection decreasing. The tolerance levels for a reduction in frequency would be higher if prices were also reduced. Again, participants felt any potential reduction in the frequency of delivery and collection would feel like a backward step rather than an evolution to meet consumers' needs.

Appendix: focus group discussion guide

Introduction

The purpose of this research is to gather information on how any changes to Royal Mail's universal service obligation (USO) would affect Northern Ireland consumers. Our previous exploratory work shows 27% of Northern Ireland consumers say changes to the USO would have a negative impact on them, this research is to find out what that could/would be. We hope this information will help us with our quantitative research and give us an informed view on an Ofcom discussion paper which we expect in January/February 2024.

Background

Universal service obligation (USO) sets out that Royal Mail must provide a six-day-a-week, one-price-goes-anywhere postal service to the 32 million UK addresses.

General discussion

When I say 'Royal Mail' what do you think of? What word comes to mind? (Probe emotional rather than rational.)

Tell me what you know, if anything, about Royal Mail's universal service obligation?

Royal Mail's universal service obligation includes the following:

- Delivery of letters or other postal packets. At least one delivery of letters every Monday to Saturday. At least one delivery of other postal packets every Monday to Friday.
- Collection of letters or other postal packets. At least one collection of letters every Monday to Saturday from every access point in the United Kingdom used for the purpose of receiving postal packets, or any class of them, for onwards transmission in connection with the provision of a universal postal service. At least one collection of other postal packets every Monday to Friday from every access point in the United Kingdom used for that purpose.
- Service at affordable prices in accordance with uniform public tariff. A service of conveying postal packets from one place to another by post (including the incidental services of receiving, collecting, sorting and delivering them) at affordable prices determined in accordance with a public tariff which is uniform throughout the United Kingdom.
- Registered items service. A registered items service at affordable prices determined in accordance with a public tariff which is uniform throughout the United Kingdom.
- Insured items service. An insured items service at affordable prices determined in accordance with a public tariff which is uniform throughout the United Kingdom.

- Services to blind or partially sighted. The provision free of charge of such postal services as are specified in the universal postal service order to such descriptions of blind or partially sighted persons as are so specified.
- Legislative petitions and addresses. A service of conveying free of charge qualifying legislative petitions and addresses.

Which of these were you aware of?

How do you feel about them?

Which parts are most important/least important?

Is there anything you would add to them?

How do you feel they meet their obligations?

How important is the overall service it provides to you?

How does the universal postal service fit within the world of communication for you?

Could you do without it? Why/why not?

How does the universal postal service fit with your lifestyle when receiving and sending parcels? Could you do without it? Why/why not?

What are the most common ways you communicate with others/buy goods? Why?

Are postal services an important part of your communications/access to goods, such as buying online? Why?

Sending letters

How often do you send letters? What type of items do you send?

What service do you use to send them? 1st Class, 2nd Class, registered service? Why do you use these services? How important are they to you? What would you miss if these services were not available? How would it affect you?

How important is knowing a letter will be delivered the next day? Why?

How would you rank the importance of speed of delivery, tracking information and delivery confirmation?

Are there other features you would like to see?

Have you any views on being able to track items?

Receiving letters

How often do you receive letters? What type of items do you receive? How important is it to you to receive these through the postal service? How would you be affected if

the sender (the government, for example) decided to no longer send these items through the post and moved to digital communication?

Thinking about letters what do you think is the most/least important parts of the universal postal service? Could you do without it? Could other people do without it?

Sending parcels

How often do you send parcels/packages? What type of parcels/packages do you send? What service do you use to send them? 1st Class, 2nd Class, registered? Is it important to have different postage options? Why do you use these services? What would you miss if these options were not available? How would it affect you?

How important is knowing a parcel will be delivered the next day? Why do you say that? Why is speed of delivery important? Is it need for the item? Instant gratification? Peace of mind knowing the item has been delivered securely?

Are there other features you would like to see? Greener deliveries? Would you be willing to pay more or wait longer for items to be delivered with less CO2 emissions?

Have you any views on being able to track items?

Receiving parcels

How often do you receive parcels/packages? What type of parcel/packages do you receive? If shopping online, what service do you pay for to receive your items? Which parcel company delivers your parcels? How important is Royal Mail? Why do you say that?

Would you be aware if these items are sent to you by 1st Class, 2nd Class, registered? Is it important to have different postage options?

Thinking about parcels, what do you think is the most/least important parts of the universal postal service? Could you do without it? Could other people do without it?

Greener deliveries: what are your thoughts on picking up parcels from central locations, such as locker banks/parcel shops/Post Offices?

Benefits of the universal postal service

What are the benefits of USO to you personally?

What are the benefits to others? (Prompt people with disabilities, 65 or older, people with low income.)

Tell me about the downsides of USO currently?

Do you think these downsides impact other people more? (Prompt people with disabilities, 65 or older, people with low income.)

How important is the ease with which you can get to a service access point (post/pillar boxes, Post Offices)?

If you were in charge of the USO what changes would you make to improve the service offered?

Reliability of the universal postal service

What does a reliable postal service look like to you? Why do you say that?

Would you consider the current service provided by Royal Mail reliable? Why/why not?

How important is it to receive parcels/letters in the time you should?

Do you know how many days the postal service operates?

If the service was reduced from six days to five, how would this affect you?

How do you think it would affect others? (Prompt people with disabilities, 65 or older, people with low income.)

Would you like to see changes to the reliability of the postal service over the next five years. How would you like to see it change? Why do you say that?

If you were in charge of the postal service what changes would you make to improve its reliability?

Same level service across the UK

Do you think consumers in Northern Ireland receive the same level of service from Royal Mail as consumers in Great Britain?

For example, you live in Belfast and order a product from a company in London. The company uses Royal Mail. You should pay the same postage and expect the same delivery timescale as a customer living in London ordering the same product from the same London-based company. There is no difference as part of the universal service.

How important is it to receive the same level service across the UK? What should this look like? What, if anything, can be done to improve your experience?

Universal service offering pricing

Uniform pricing refers to the fact one price goes anywhere to all UK addresses. It requires Royal Mail to deliver letters to every address in the UK six days a week and parcels five days a week at a uniform price.

Price increases on 2 October 2023 meant the price of 1st Class stamps increased by 15p, from £1.10 to £1.25. The price increase also affected both 1st and 2nd Class large letters. First Class large letter prices now start from £1.95, up from £1.60, with 2nd Class large letter prices starting from £1.55, a 40p increase from £1.15.

Role of the current price cap: the 2nd Class service is the most basic part of the universal postal service which must be affordable to all consumers across Northern Ireland. In this context, the existing price cap mechanism is an essential regulatory safeguard for consumers. This must protect consumers from price increases that negatively affect access to the most basic part of the service and ensure consumers do not have affordability issues related to the regulated prices for the services that are covered by the cap.

Thinking about sending and receiving letters and parcels, how important is uniform pricing to you? Why do you say that?

How important is uniform pricing to others? (Prompt people with disabilities, 65 or older, people with low income.)

How affordable are these products and services for yourself/others? (Prompt people with disabilities, 65 or older, people with low income.)

If the current price cap was removed and prices increased, how would this impact yourself/others? Probe whether they would use the service less. Probe alternatives.

How would you feel if the universal postal service moved away from uniform pricing and Northern Ireland consumers were expected to pay more than different parts of the UK?

Royal Mail request to reform USO letters

The current USO ensures at least one delivery of letters every Monday to Saturday and at least one delivery of other postal packets every Monday to Friday.

How would you feel about a change from six to five day letter delivery? How would you feel about a change from five to four day parcel delivery? Probe positives/negatives.

How do you think it would impact others? (Prompt people with disabilities, 65 or older, people with low income.)

What would be the impact (positive and negative) of reducing the service?

How would you feel about a change to even fewer letter delivery days, three or four, for example? How would you feel about a change to even fewer parcel delivery days, three, for example. Probe positives/negatives.

How do you think it would impact others? (Prompt people with disabilities, 65 or older, people with low income.)

What would be the main consequences of reducing the service?

Why do you think Royal Mail is considering the change?

Future changes

What are the key features that you need from a USO currently in terms of letters?
Why?

Do you think these key features will change in future to meet your evolving needs?
How?

What are the key features that you need from a USO currently in terms of parcels?
Why?

Do you think these key features will change in future to meet your evolving needs?
How?

How do you think the postal service can evolve to help deal with climate change? Is
this important to you? Why/Why not?

Any other comments

Is there anything you would like to say in regard to Royal Mail and the universal
service offering?

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