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Post in the Scottish Islands

**A report by Thinks Insight and Strategy on behalf
of Consumer Scotland**

Table of Contents

<i>Executive Summary</i>	3
<i>Introduction</i>	5
<i>How life on the islands impacts views of post</i>	8
<i>Experiences of post</i>	14
The journey of post	14
What is working well	17
Challenges with post	20
The impact of postal challenges	28
How islanders manage postal challenges	33
<i>Addressing postal issues</i>	36
Principles for different solutions	36
Feedback on the potential solutions to postal challenges	37
<i>Conclusion and implications</i>	43
<i>Appendix</i>	45
Full sample frame	45
Issue by island area	46

Executive Summary

Consumer Scotland commissioned Thinks Insight and Strategy to understand the challenges that consumers living in three island regions face around post – Orkney, Shetland and Na h-Eileanan an Iar. Workshops were held with 36 postal users in each of the island area mainlands, and remote interviews carried out with 10 consumers living on smaller islands.

Key findings

People living in the islands rely on post to gain better access to services and goods, which can be challenging to reach, particularly in smaller and more rural communities. Post gives islanders access to financial, electoral and healthcare services, as well as access to a wider range of goods and to customers for small business owners. Due to this, participants speak positively about most of their experiences with post, and see postal workers as pillars of the community.

Participants rely on Royal Mail, and a network of local hauliers and couriers to access the goods they need. While many recognise that these systems generally work well, participants raise a number of challenges that impact participants across all three of the island areas covered by this research. These include:

- Delays to delivery, some of which are seen as part of island life and unavoidable when related to weather and long distances – and therefore acceptable. However, delays are also caused by other issues considered less acceptable, including staffing issues and issues at the Glasgow sorting office.
- Inconsistent delivery speeds for letters and parcels delivered by all services, with newer post overtaking older post, which raise concerns around the efficiency of the postal system.
- Additional costs through parcel surcharges, making certain items unaffordable.
- Inaccessibility of certain goods through the post, which are restricted and cannot be delivered via plane. Participants also experience issues getting items from certain businesses and websites delivered to the islands, and often receive poor communication about this.
- Having to rely on local couriers and hauliers, organising the logistics of getting goods to their address themselves which can be time-consuming and costly, and leads to uncertainty around their rights when things go wrong.
- Challenges accessing post offices, especially in very rural communities where post offices are only open for a couple of hours per week.

These challenges impact participants in making it harder for them to access certain goods and services, making it more expensive for them to receive goods. Small businesses are also impacted, as delays cause issues with customers or mean they have to pause production, losing out on potential income.

To manage these challenges, islanders rely on a number of workarounds, including using couriers to personally arrange transport from mainland and relying on informal community systems. This means they spend sometimes significant amounts of time thinking and managing post – planning ahead and managing parts of the postal journey themselves.

When it comes to advocating for solutions that will address these postal challenges, participants across all three island areas say they want Consumer Scotland to advocate for solutions that will:

- Make things fairer for islanders and remove disadvantages such as parcel surcharges.
- Protect access to services that are working well and continue to improve them, (i.e. expanding Royal Mail's coverage across businesses and websites).
- Address key issues such as staffing and extremely delayed parcels.
- Ensure that any solutions brought in are tailored to the local context.

Introduction

Background to the research:

As the statutory body representing the interests of consumers in Scotland, Consumer Scotland have an important role to play in making sure that postal services work for consumers across Scotland. Existing research shows that consumers living in more rural and remote areas of Scotland face particular challenges accessing and using postal services. This includes research conducted by Thinks Insight and Strategy on behalf of Consumer Scotland among low-income consumers living in rural areas, which identified challenges around both the cost and reliability of postal services for those living in more remote locations¹.

These challenges take on a particular character for postal users living in three islands regions that are both uniquely remote and are not covered by the Royal Mail Quality of Service Postcode Area (First Class) targets that apply elsewhere. These three island regions are Orkney, Shetland, Na h-Eileanan an Iar (previously known as the Western Isles), and are as such the locations upon which this research is focused. While these areas are covered by other national level targets, the population numbers are low in relation to the total UK population which means that low Quality of Service does not materially impact the national average.

To better understand the issues that consumers in these areas face and how they might best be addressed, Consumer Scotland commissioned Thinks Insight and Strategy to conduct qualitative research with postal users living in Orkney, Shetland, and Na h-Eileanan an Iar. This research was conducted with consumers who use post on a personal basis, as well as those who use post to support a small business for which they are the primary decision maker. We also engaged stakeholders representing local organisations which rely on the postal service. Participants shared their experiences of postal services on the island and worked to co-design policy solutions to the problems that they face.

Findings from this research will be used to support Consumer Scotland's advocacy with the UK Government, Scottish Government (noting postal policy is reserved), Ofcom and postal sector on how to effectively address the issues that postal users on the islands face.

Research objectives:

Consumer Scotland's objectives in commissioning this work were to:

- Understand how consumers and small businesses living in island communities currently experience postal services.

¹ <https://consumer.scot/publications/post-and-low-income-rural-consumers/>

- Use co-design methods to identify potential solutions, including place-based approaches to support improvements to these audiences' experiences of postal services in island communities in Scotland.

Methodology

Overview of research methodology

This work took a qualitative approach, to achieve as in-depth an understanding of the experiences of postal users as possible. An overview of our approach is below:

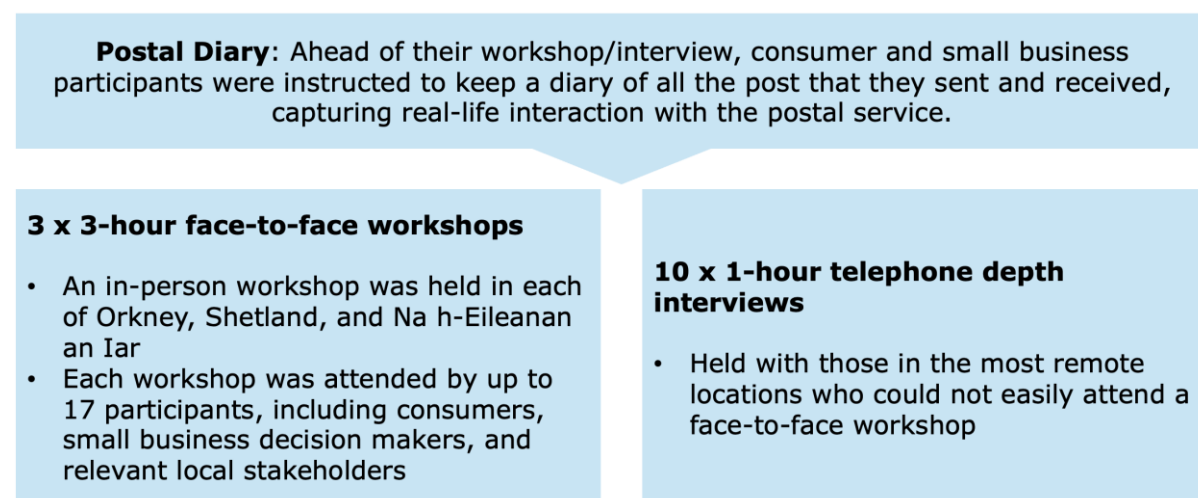


Figure 1: Diagram outlining the approach taken for this research

Postal diary

As a pre-task ahead of the workshops and interviews, consumer and small business participants were asked to complete a postal diary, recording all the post that they sent and received in the run up to the session. This activity provided specific details of participants real-world use of post, as well as encouraging them to reflect on their postal habits and routines ahead of the workshops and interviews. Stakeholder participants were not asked to complete a postal diary as the focus was on the use of postal services by the organisation that they represent, rather than their own personal use.

Workshops and interviews

In-person workshops with postal users were held in Orkney, Shetland, and Na h-Eileanan an Iar, each lasting three hours. We also conducted 10 telephone depth interviews with postal users living on an island area away from the mainland of the island region, to ensure our approach was inclusive for those who may have found it difficult to attend in-person workshops in central island locations.

These workshops and interviews focussed on consumers' experiences of using postal services; what is working well, what the primary challenges are, what

they view as the cause of these challenges, and how they feel this compares to experiences on the Scottish mainland.

Participants were also presented with a series of policy measures developed by Consumer Scotland to address the challenges around postal use on the islands. Participants were invited to provide feedback on these measures and use their experience to co-create solutions to postal challenges that would meet their needs and those of their community.

Sample

We engaged with a total of 46 postal users from across the islands in this research, 36 of whom attended the in-person workshop, and 10 from smaller islands in the three island regions took part in telephone interviews. Of this 46, 16 participants were the decision makers for a small business, for which they relied on the postal service. We also engaged with 8 stakeholders representing local organisations that rely on the postal service within the in-person workshops, bringing the total number of research participants to 54. The organisations represented by stakeholders included local councils, local service providers, community organisations and trade organisations.

This sample was designed to ensure a representation of a broad range of characteristics. It included quotas on demographic factors including gender, age, and socioeconomic grade. This is a qualitative sample and is not designed to achieve statistical representation, but a diverse range of experiences across the sample.

To ensure strong engagement with the postal service across the sample, only participants who confirmed that they “use the postal service regularly to send or receive important letters or packages” were selected to take part in the research.

How life on the islands impacts views of post

The geographic position of the three island groupings which this research is focused on (outlined below), and the rurality of much of the population, leads to a unique outlook which impacts the way islanders think about and use post.

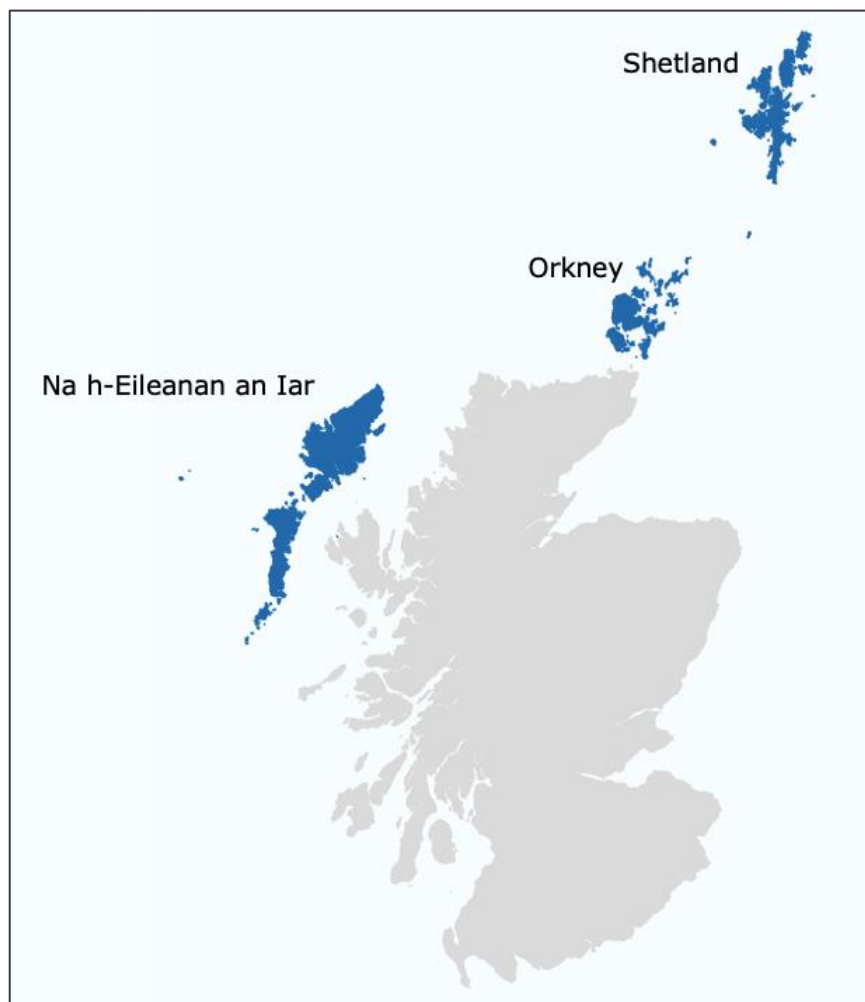


Figure 2: Locations of the three island areas focused on in relation to the Scottish mainland

Reliance on post

The geographic situation of the three island areas covered in this research means that travel to and from these islands is time-consuming, often expensive, and many travel options are subject to disruption.

To participants, this distance and low population density means that access to services and shops are limited, particularly on smaller islands – echoing the findings from our earlier research into low-income rural consumers. While most participants can easily get hold of daily essentials in their local shop or supermarket, it can be harder to buy other, more specific items which may be essential for day-to-day life or people's small businesses.

Participants also feel that the islands have an older population than the mainland. They argue that this group is less likely to be using technology day-

to-day, and therefore requires post to manage much of their correspondence and financial, medical or other admin.

What this means for post: In practice, this means participants feel they are often more reliant on post than people living on mainland Scotland, particularly those living in the Central Belt. On the islands, post allows them to access goods that aren't available on the island, manage admin tasks and keep in touch with friends and relatives who live off-island. Participants also expect that older people living on the islands are using post more than most others across the UK.

"Sometimes it feels like a bit of a first world problem that we're complaining about the post, but actually a lot of people rely on it up here." – Workshop participant, Orkney

Expectations of island life

Participants speak very positively about island life, regardless of whether they are born and bred on the island or have moved there later in life. They acknowledge the inconveniences of island life, such as inclement weather, slow and expensive transport and less access to services. For example, they recognise they have less access to services like banks, health services and post than people living in more urban areas on the Scottish mainland.

These inconveniences, however, are largely seen to be part and parcel of island life due to uncontrollable factors like distance and the cost of reaching the islands, and as such are often challenges that participants are willing to tolerate. This is a trade-off participants are willing to pay for the beauty, tranquillity and sometimes the isolation of rural life.

Low expectations for service delivery mean many are not angry when things don't work as expected. They are also willing to expend time and energy to create workarounds when services and systems fail them. To participants, this means having to live at a slower pace, planning further ahead and being more resilient than they feel people are in mainland Scotland. While we saw this across the islands, tolerance for this inconvenience seems to be stronger on smaller islands, which take longer to travel to and where life is more rural. This willingness to accept discomfort gives some islanders a sense of pride, as an example of them living life authentically.

However, it is worth noting that not all participants are willing to tolerate lower access to services, and do express frustration that they receive lesser services than people on the mainland. This feeling was stronger amongst those who have always lived in the island regions (as opposed to people who have moved there later in life), those who are operating small businesses that rely on post and those who have experienced more significant system failures, such as damage from local couriers or delays lasting weeks resulting in no letters or parcels being delivered.

What this means for post: Island participants' relatively low expectations around services mean that, spontaneously, many say they are pleased with the postal system. They appreciate that they receive this service at all, and are delighted when it works as it should (even if this is more poorly than it does on the Scottish mainland). Those living on smaller islands feel this most strongly.

It is only when delving deeper into their own postal experiences that many start to identify problems and acknowledge the extensive workarounds they have put in place to mitigate issues. In many cases, participants do not recognise that they are having more negative experiences and expending more time and energy thinking about post than their mainland counterparts.

"I have no issues at all. It's just the island life. We choose to live on or choose to come back to the island, and there are always going to be delays and this and that. What I do find if I am doing jobs for folk and we do have to wait for parts, they're very, very understanding." – Interview participant, Na h-Eileanan an Iar

A strong sense of community

The people we heard from living on the islands feel they are part of a tight-knit community where neighbours know each other and will lend a hand to support each other. This is particularly strong on the smaller islands with small populations, where islanders all know each other very well.

This community spirit is often drawn on to mitigate against the challenges associated with island life, particularly in times of poor weather or when services are unable to run as expected.

It also means that participants identify as being very community-minded. They feel highly connected to their community spaces and local businesses in their area, and use them both regularly. They also have a pride in donating to important local causes and helping those in need.

However, participants feel that this sense of community is changing over time and becoming more diluted. This is particularly the case in Shetland and Na h-Eileanan an Iar, where changes in population mean that more people are coming from the mainland and beyond, and are not always perceived to be contributing to the community in the 'right' way.

What this means for post: Islanders value their connection to the local community – and the land – and extend this to the way they view postal workers and the postal service. This sense of community means most know their local postal worker well, and see them as pillars of the community. They feel the postal worker plays a key role in making the system work through their local knowledge and willingness to adapt to people's needs and habits to support the community.

It also means that many communities have informal systems for getting post to one another, whether passing on items from the postal worker, to picking up goods for each other on the mainland.

Participants are interested in the role that community spaces and businesses can play in supporting the postal service on the islands. However, they also are aware of the burden this can place on the people who volunteer and work in those spaces, which make some reluctant to embrace these ideas.

"We have a very nice postie who very helpful, very amenable. He is, as many posties are, sort of the unofficial social services, because he would see if someone was ill or wasn't picking up their post or something like that. So I think it's like most communities, if you have a good postie it makes a huge difference." - Interview participant, Shetland, Small business

Strong local identities

Those we heard from feel they are very separate from those living in mainland Scotland. They say they have a very different way of life, and many see life on the islands in opposition to life on the mainland – where people are more likely to be 'entitled' and strongly value convenience.

Participants from Shetland, Orkney and Na h-Eileanan an Iar feel each area has an individual identity and culture, and participants are reluctant to be treated as a homogenous group of 'islands'. Participants from the Northern islands and Na h-Eileanan an Iar, in particular, feel they have very different cultures. Na h-Eileanan an Iar stands out from Shetland and Orkney as many inhabitants speak Gaelic, but also as they have a larger population of 'off-islanders' who have moved there from mainland UK. Conversely, Shetland and Orkney have larger proportions of 'born and bred' islanders, and see more Norse influence in their local culture and identity.

Beyond this, the smaller islands have strong senses of individuality, and each have their own culture. Those living on more distant islands also feel that life is different compared to the island area mainlands, as populations are much smaller, transport options often more limited, and they have less access to services.

While each of these communities experience similar issues in terms of accessing goods and services, these can manifest and feel very different to people living on each of the islands.

What this means for post: Those living in the islands understand they have unique sets of circumstances which impact the way post leaves and arrives on the island. But as many decisions around the management of post on the islands are made in mainland Scotland, participants feel they don't always reflect the needs of their communities. Participants want to

see solutions that are tailored to each of the islands, as they recognise that at the moment postal workers are often having to take their own initiative and to adapt approaches to make post work better in each island.

"We are out of the way, we can get forgotten about... one size fits all doesn't work for certain communities, and we've got a community here that's different in its makeup and logistically different, so we've got to try and have our needs met." -
Workshop participant, Orkney

The rural economy

Small businesses are very much a part of rural life in the three island areas considered in this research. Participants speak of running small businesses across tourism and hospitality, agriculture (particularly in Orkney) and fishing, and craft businesses.

Distance and rurality limit islanders' access to larger chains, meaning that many rely on small businesses to provide essential goods, services and employment locally. These small businesses form part of the rural economy, but also allow communities to stay connected to their cultural heritage, and to maintain the tradition of heritage crafts.

What this means for post: Small business owners regularly use the post to reach their customer base and to keep their business running. Many recognise they would be unable to function as a business without the option of selling to customers outside of the island area (and for some, across the world). Access to post means they can receive and send goods as part of their production, but also more easily manage their legal and regulatory requirements (i.e. sending and receiving relevant licences).

Population challenges

Participants recognise that the islands are facing population challenges, with ageing populations and younger residents leaving for the mainland. This is mostly an issue in Orkney and Shetland, but does somewhat affect Na h-Eileanan an Iar too.

Combined with a tourism boom across all the islands since the pandemic, but particularly in Orkney, participants say this has caused a housing crisis, which makes it very difficult for working age people to move to the island, or to stay on the island if they were born there. They notice that newcomers are unable to find a home and stay in tourist accommodation or are unable to afford homes with the salaries provided by industries which are trying to recruit most (care, hospitality, etc). They say this causes significant challenges for local businesses and services to retain and hire staff.

What this means for post: Participants note that Orkney and Shetland in particular face challenges when it comes to hiring and retaining postal staff. This means Royal Mail and the Post Office are often having to rely on agency staff or new hires (which are often unable to stay), meaning that staff can be inexperienced and makes mistakes. Illness and annual leave for current staff also creates challenges, as there is little capacity to cover time off for postal workers.

"Accommodation is a massive issue for everybody in Shetland and nobody can hold down a job because they never have anywhere solid to live." – Workshop participant, Shetland

Experiences of post

The journey of post

Royal Mail, having a statutory requirement to deliver to all UK addresses, delivers to all of the islanders we heard from.

When it comes to other parcel operators, not all courier services deliver to each of the island areas. Coverage from other couriers services varies greatly across individual islands, with local couriers only being subcontracted by a small number of national services, limiting consumers' choices around couriers. This is particularly the case for smaller islands, where in some cases, the population relies on only one local delivery driver to act as a local courier for all parcels that aren't sent through Royal Mail.

Note: Participants use the terms 'courier' and 'haulier' interchangeably, particularly as the main haulier companies that serve these three island communities also provide courier services. Typically, hauliers transport bulky goods over long distances, while couriers provide smaller deliveries within specific regions. In this section, we refer to the service of delivering goods to the islands by ferry or ship as hauliers, and the service of delivering goods to people by van as couriers.

Participants are generally very aware of the journey their post takes to get to their house, whether it comes from Royal Mail or local courier. As post to the islands can be unpredictable, and is often delayed or lost, many participants spend a lot of time monitoring the journey of their post. The table below outlines the journey that participants think post makes to get to each of the islands.

Participants' view of the journey of post to their area		
Islands	Journey for Royal Mail	Journey for other post
Na h-Eileanan an Iar	- Post goes to the sorting office in Glasgow but does occasionally travel through Aberdeen. - Some post travels by plane to Stornoway Airport, but some travels by ferry. - Post is sorted at the Stornoway sorting office. - Post is driven out by postal workers to each of the different islands by ferry or road by mid-morning.	- Large items, and items that cannot be delivered by Royal Mail are delivered to a haulier business in Inverness, then shipped to Stornoway by the local haulier / courier business. Residents then pick up items from the haulier warehouse or it is delivered to their house. - Smaller Amazon packages are delivered quickly via Royal Mail.

Orkney	• Post goes to the sorting office in Glasgow. • It then flies to Kirkwall airport – the earliest plane lands at 9am, which means that post cannot be delivered until the next day. • From there, it is delivered to the Kirkwall sorting office. • Post gets sorted, then driven out by postal workers to each of the different islands by ferry or road by mid-morning.	• Larger packages are shipped by hauliers to the islands. Items are delivered to the providers' Aberdeen terminal, then are delivered to a warehouse in Kirkwall – people can pick these up themselves at the warehouse or get them delivered by van to their home by the haulier. Many of the smaller islands also have their own depots. • Amazon packages travel surprisingly quickly to the islands, with participants unsure how this is managed but assuming they come by plane. • Smaller Amazon packages travel through Royal Mail, by plane and are delivered by local couriers, which means delivery time can vary greatly.
Shetland	• Post goes through the sorting office in Glasgow. • Then flies to Sumburgh airport on one of the morning flights. • From there it is taken to the sorting office in Lerwick. • Post gets sorted, then driven out by postal workers to each of the different islands by ferry or road by mid-morning. • Some participants reported that Sumburgh used to have its own sorting office / post office (Toab shop), which meant that people in the South of the Shetland mainland would receive their post faster and earlier.	• Larger packages are shipped by hauliers to the islands. Items are delivered to the providers' Aberdeen terminal, then are delivered to a warehouse in Lerwick – people can pick these up themselves at the warehouse or get them delivered by van to their home by the haulier. Many of the smaller islands also have their own depots. • Smaller packages travel through Royal Mail, by plane and are delivered by local couriers, which means delivery time can vary greatly. • Amazon packages travel surprisingly quickly to the

		islands, with participants unsure how this is managed but assuming they come by plane.
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Figure 3: Table outlining participants' view of the journey post takes to reach them

"Well, we live on a small island and there's a ferry that runs between Yell and Unst. And then there's two ferries to get to us from the mainland and the only time that the post would be delayed would be if the ferries had to stop running because of the weather, which happens through the winter a handful of times." – Interview participant, Shetland

"I think they come up as far as Kirkwall by plane, but they come to Shapinsay by ferry because we don't have a plane service [...] up in the island you're getting [post] by sort of half past three, four o'clock and these days they've changed it so it only comes over on the dinner time ferry." – Interview participant, Orkney

What is working well

Many islanders are impressed that the postal service works at all, considering they live in places they consider both rural and 'remote', and considering their relative distance from mainland Scotland.

"I stay on the Isle of North Uist. North Uist is probably one of the most remote westerly places in Britain. We're about an hour and three quarters into the Atlantic by ferry from the Isle of Skye." –

Interview participant, Na h-Eileanan an Iar

They point to a set of specific examples of how post is working on the islands:

Keeping the islands connected

Post plays a vital role in keeping the islands connected, even when it isn't working as well as it should or could. Participants highlight the ways that post allows them to access services and information that are difficult to get on the islands. It also plays an essential role in keeping residents connected to others within and outside of the island areas, which is particularly important for older people who may not be able to access the internet.

Additionally, post gives islanders access to goods they wouldn't be able to access on the islands, where there are often few shops, limited choice and prices are higher. Having access to shops and brands that aren't on the islands is really important to islanders, especially if they are looking for specialised items. Those who live further away from towns value the ability to buy goods without having to undertake long and complicated journeys.

Small business owners recognise that they often would not be able to operate without the postal service. Many receive essential items for their business by post (ranging from glass bottles to washing machines). Post is also the way many sell on their goods or manage their operations, as these participants post out local crafts or goods to customers across the world. With this in mind, post is essential for maintaining the rural economy as well as the isles' craft and heritage.

"The pet food is a big thing, I can't get the certain pet food that I use in Orkney, so I have to order it in from another place. I've got a young puppy, so obviously without that he wouldn't have his food." – Interview participant, Orkney

Universal Royal Mail coverage

Participants are grateful to have universal coverage from Royal Mail, even when they live on very small islands. All participants in the sample can send and receive post via Royal Mail and find it is usually a straightforward process for them. They also say they regularly receive post rounds (despite some specific

challenges discussed below). Sending letters is seen as mostly an easy process, since there is a good spread of post-boxes across the islands.

While participants raise some concerns around the rising prices of stamps, sending letters and parcels within the UK via Royal Mail is seen as relatively affordable compared to alternative couriers. To participants, it is essential that this service be maintained as many rely on it, even if they are using it less often than they used to.

"[The price of stamps] has increased steadily, as you'll know, over the years, and it's getting more and more out of reach. But in terms of, like, in comparison to everything else, and the fact that you can send to the whole country for the same price, I think it's not too bad." - Interview participant, Orkney

Royal Mail staff and postal workers

Participants feel a strong appreciation for their postal workers and the work they do. They recognise postal workers' contributions to overcome the challenges (postal or otherwise) that the islands experience. In the workshops and interviews, participants noted that postal workers are often operating in challenging conditions, working long hours in frequently harsh weather, for relatively low pay. This view shapes participants' perception of the postal service they receive, as well as their view of what could be improved, and which solutions they see as acceptable.

Most have had the same postal worker for years and are on very good terms with them. They emphasise the strength and value of postal workers' local knowledge, and the fact that on many of these islands – these are expert jobs. Participants say that postal workers will always get the post to you if they know you and the area. Many say that there is no such thing as a missed parcel for people living in the islands, as postal workers will deliver letters and parcels inside people's porches or unlocked homes, or to people's unlocked cars if they aren't in.

In some cases, this requires good knowledge of individual residents and the layout of the land. One participant living in a small island regularly stays in different properties and appreciates that the multiple postal workers across the island always deliver post to the address where he is currently staying, coordinating this informal arrangement amongst themselves.

Participants in the workshops also spoke about the importance of postal workers being embedded in the local community – for example, identifying the right recipient even when streets, houses and residents have the same name, to ensure that everyone receives the right mail.

Some post gets there faster than expected

In general, participants expect their post to take a long time to arrive. This is discussed in more detail in the section below. However, some providers manage

to get post to the islands relatively quickly, which participants are always pleasantly surprised by.

Royal Mail can sometimes get smaller items delivered within a couple of days, and Amazon can successfully get larger items delivered at speed. Those living on the largest, most populated islands (i.e. Lewis, mainland Orkney and mainland Shetland) see post delivered more quickly than those living on the smaller islands.

One way that many participants access faster delivery speeds and cheap deliveries for goods is the use of Amazon Prime. While most are happy with this arrangement, some participants feel that they have little choice but to sign up to a monthly subscription to be able to order items at speed affordably. They also feel they have to buy items from Amazon, and discount other businesses. This is more common amongst small business participants, who wanted to be able to shop with and support other small businesses directly.

"If it's coming through Amazon Prime or whatever, it tends to come within a day to five days, kind of tops for most things. But for Orkney, I think that's pretty reasonable because you tend to, when you're ordering from other companies, you tend to assume that you've got to leave a minimum of five days." – Interview participant, Orkney

Challenges with post

1. Delays to post arriving to destination

The two main issues causing delays to post arriving and leaving the islands are distance and harsh weather, which are both seen as reasonable causes for delays.

Strong winds, fog and storms can make it challenging for ships or planes to leave and land in the islands and deliver mail. Storms and flooding also prevent mail from travelling within the area or within the islands, meaning that post cannot be delivered from sorting office to people's homes. This is particularly a challenge for people living in Shetland, as they are relatively further from the mainland than most living in Orkney and Na h-Eileanan an Iar. Participants are very tolerant of delays caused by poor weather and understand that these are unavoidable due to the location of the islands.

"It depends on how long it takes for the boat to actually arrive, how long it's closed for. Because sometimes it can add three or four days on which if you're waiting for something that can be too late, especially when you've got a backlog at the post office." - Workshop participant, Shetland

Geography means it takes longer for post to travel to and within the islands. Those living on smaller islands especially are typically far away from sorting offices, or live in places which require complex logistics and longer time to travel to (i.e. requiring two ferries and driving across three islands). The timings of ferries and flights often means that post cannot realistically arrive to destinations in the two-three day window allowed for a 2nd class stamp for example, particularly if a letter or parcel is sent later in the day. While this can be frustrating, participants accept that the post must work around transport timetables.

However, delays to post arriving are also caused by other issues which participants feel are avoidable and more frustrating:

Sorting office issues: Royal Mail post to the Scottish islands used to go through Inverness, but with the closure of that sorting office, it now goes through Glasgow instead. Participants say this change has had a negative impact on the speed of post, as it gets delayed by the sorting office in Glasgow, and there seems to be some ongoing confusion about where parcels should be headed. Participants are aware of this as they are tracking their mail online, and see it get delayed at Glasgow, sometimes for weeks at a time.

Participants are also frustrated that the current journey of post through Glasgow adds unnecessary distance and delays. Participants in Orkney also express annoyance that post they send within the islands travels down to the Central Belt before travelling back up to Orkney, rather than staying within the area. As

well as causing delays, this longer journey for mail also means it is more likely to get lost between sorting offices.

"Personally I have lost three or four items in the last year, and I don't like to point the finger, but our post used to be all done through Inverness and it now goes to Glasgow. We have ridiculous situation that if you're sending something from here to Thurso, which is one and a half hours away on the ferry, it goes to Glasgow first and comes back." – Interview participant, Orkney

Staffing issues: Localised staffing issues cause significant delays to post, as postal workers need to cover longer rounds in a shorter amount of time, or inexperienced agency staff are brought in to relieve pressure on the system. Participants suspect that postal workers who are providing cover (sometimes for multiple weeks or longer) end up taking over multiple rounds, which mean they deliver to each home only every 2nd or 3rd day. This means that participants sometimes don't get post for a couple of days and will receive a larger volume at once – impacting both the reliability of post and causing delays for letters and small parcels.

"I have no issues with Royal Mail at all. But it's the delivery drivers that are doing their best, but maybe there's not enough people that are working for them and they're under stress and that's why they're turning up late or not at all for a day or two."
– Interview participant, Na h-Eileanan an Iar

Participants emphasise how complicated the rounds in the islands can be, as houses aren't numbered in a linear fashion or have house names. New and agency staff making the deliveries lack this local knowledge, which leads to post going missing or getting delivered to the wrong address, causing issues and delays.

"If you live in a crofting township, the numbers do not go 1, 2, 3. They're all over the shop, sometimes they're the same... Our new postie was at the top of the road last week at quarter to 7, she still hadn't finished the round. It's getting used to where things are." – Workshop participant, Na h-Eileanan an Iar

In some areas, they say that old and broken fleets of Royal Mail vans also compound with staffing issues to cause delays – this is particularly an issue in Shetland. Participants report vans having to be off the road due to mechanical issues, with a lack of backup vehicles meaning that post is not delivered in that period.

Spotlight: Postal delays

"[My wife] is disabled and we live in the disaster area of post in [community]. We didn't get any post for six weeks and missed hospital appointments and things, so that was quite bad."

Multiple participants reported facing significant challenges with postal deliveries in one island community, which were eventually only resolved through community mobilisation.

Royal Mail staffing issues led to changes to the round covered. It became much longer than it had been previously and it seemed unrealistic to participants that one person could cover the entire round. The combined staffing and round issues led to letters and parcels becoming stuck in the sorting office. Residents in this community only received occasional deliveries across multiple months, which meant that post sometimes took over three weeks to arrive. This impacted people's parcels, as well as important health letters.

Collective efforts from the local community to raise the issue with Royal Mail and work to a resolution were unsuccessful. Eventually, residents organised for the community hall to be opened and for Royal Mail to drop off lorry loads of the parcels that were still in the sorting office. Local residents then came to sort through and collect their packages.

2. Delivery speeds are inconsistent

While participants generally see much of their post being delayed by at least a couple of days, these delays can vary greatly.

Some delays are significant and last over a week. This is particularly the case when there is poor weather (which participants feel is understandable and acceptable) or significant staffing issues, which participants see as less acceptable. However, at other times, post can arrive to destination unexpectedly quickly (i.e. next day or within two days), even if participants are still waiting on older post to arrive. Participants find it particularly frustrating when newer post 'overtakes' older post, especially when they are waiting on important or essential mail.

The inconsistency in these delivery speeds causes confusion for participants, as it makes it clear that post can travel quickly at times, even if islanders aren't usually seeing these kinds of speeds. They assume this is down to how post is

managed in the sorting office and raises concerns that post 'on top of the pile' is dealt with first, while older more delayed post has to wait longer.

And while faster post is seen as a pleasant surprise, this doesn't happen often enough for islanders to feel confident they don't need to plan ahead and allow lots of additional time when they need post to arrive at a specific time.

"I mean, I always say to [customers] you know, around about seven days delivery, because then I kind of cover myself a bit, but a few times it's been a little bit later, but there has been weather in between, which has delayed or stopped flights. So, you have to allow that when you live on an island, that that will happen." – Interview participant, Orkney, Small business

3. Restrictions in the transport of certain goods to the islands

As most post travels to the islands by plane, some items such as liquids and electronics are restricted. This can make it challenging for islanders to order these goods to the islands. However, they find that the rules are inconsistent across providers or the business they have ordered from – this causes confusion and further complexity for consumers. While this occasionally impacts post leaving the islands, this mostly causes issues for goods arriving to the islands.

"Because it has to come by plane, you get a little note saying they can't send it... I've had the case of an Amazon delivery, delivered by Royal Mail, that was a camera with a battery, delivered to my door. I went to buy an adaptor to charge the battery, and Amazon said they couldn't send it to me, but yet I'd already got the camera with the battery." – Workshop participant, Na h-Eileanan an Iar

4. Lack of information about delivery to the islands

Beyond this, participants find that many websites and businesses don't deliver to the islands, even if they advertise UK-wide delivery. This frustrates islanders, as they often only find out at the end of a transaction that a package cannot be delivered to them. In some cases, participants think they have successfully purchased the item and are already expecting the item to have arrived when they discover it can't be delivered. As with the restrictions on certain goods, inconsistencies between brands and providers causes confusion and frustration for consumers.

"We get complaints from time to time from consumers [on the island] about restrictions on what can and can't go through the post. People say they've been told companies can't send such and such that I wanted to order because they're not allowed to post it." – Shetland, workshop participant, stakeholder

Participants feel this adds complexity to their online purchases and limits the goods they have access to. In some cases, this means they have lost out on deals or had to buy more items at a higher cost from businesses that do deliver to the islands.

Smaller businesses are generally more likely to not deliver to the islands, which pushes many islanders towards bigger brands such as Amazon. For many – and particularly the small business owners we heard from – this goes against their desire to support small and independent businesses.

5. Islanders are having to rely on local couriers or hauliers, but this doesn't always work as well as it should.

To get hold of goods which cannot be delivered to the islands – often larger goods, liquids or electronics – participants are having to arrange part of the journey to be managed by hauliers. They do this by ordering items from a business to be delivered to a hauliers' warehouse in mainland Scotland (i.e. Aberdeen and Inverness) and to be brought to the islands by the hauliers, who will then manage courier delivery to the recipient's home.

While participants feel this system gives them greater access to goods, participants do experience issues around slow delivery and delays to their packages arriving. Hauliers are often having to wait until they have enough packages piled up to make the journey worthwhile, which causes delays and makes the service somewhat unreliable. However, participants' experiences differ here across the three island areas, as each of the hauliers use different set ups to manage the storage and sending of packages which cause varying delays.

As participants have to organise this part of the journey themselves, this also means they incur additional costs, as they have to pay both for delivery to the haulier warehouse, and for the haulier to ship the package over.

Some participants also report issues with the condition of goods that are arriving via hauliers, receiving damaged items. This means they have to organise returns to the original seller and replacements. This process is time consuming to coordinate between the haulier and business, and involves additional costs for up to three haulier journeys – with each journey costing between £15 and £50. Consumers are unsure where to turn to remedy these issues, who to hold accountable when things go wrong, and who to request a refund from for broken or damaged items.

"That's the battle. It's up to you to find out who's responsible, so you spend all your time phoning the person that sent it or the haulier." – Workshop participant, Shetland, Stakeholder

"It takes a long time, when it gets to their depot in Inverness or Aberdeen. It then seems to take a long time to get from there to Orkney. And then when it gets to there, it then takes another

*day for them to sort it and then get it to the Isles Depot.” –
Workshop participant, Orkney*

To avoid the additional admin and costs of haulier delivery, participants are only using this service when they have to (i.e. for larger or white goods). Most prefer to prioritise easier delivery which means they engage with just one delivery provider (i.e. Royal Mail, Amazon), even if they have to shop from specific businesses only or incur additional costs for this.

6. Increasing costs and parcel surcharges are unclear and feel unfair

Across all of the islands, participants reported regularly being subject to parcel surcharges for living in the islands. These often cost around £10-20, though can run up to £50 for larger items and more complex journeys involving couriers.

While there is broad recognition of why these charges are applied, given the greater distance that goods must travel, there is still significant frustration among participants about that impact that surcharges have, both on their ability to access goods and on making shopping more expensive than it would be on the mainland. Participants speak of having to do mental maths when shopping online, making sure they account for the surcharges that some providers or websites will put on their packages when comparing prices. This makes shopping online more challenging, and means islanders often miss out on deals – or that the benefit of a deal is cancelled out due to the surcharge. Combined with the broader issues with post that islanders experience, these surcharges feel very unfair for some consumers and like they are being penalised for where they live.

On the other hand, a small number of participants accept that, since parcels have to travel further to get to them, it is understandable that it will cost them more. This group tend to feel this is a reasonable cost to pay for the benefit of living in a beautiful rural area and having a higher quality of life – despite the fact they have to manage a more challenging consumer journey. Even among this more accepting group, however, there is often frustration that these surcharge costs are not better signposted, often being applied only at the final moment of purchase, or in some cases even later.

"It was going to be £10 delivery, which I was like, well, it's quite heavy, so fair enough. So, I paid that and then they phoned me up and they said, because of where you live, we're actually going to put a £50 surcharge on that, on top of the £10 they'd already charged and what everyone else has to pay. And at that point I just said no thank you." – Interview participant, Orkney

7. Challenges accessing post offices

The main challenge that participants experience around post office access is the opening hours, with some, particularly in very rural communities and small islands, only open for a few hours a week. These are generally more likely to be open only in the morning which makes it harder for those who work in rural

industries to access them, as they generally need to be working in the morning. Post offices that are run in small businesses (i.e. the local village shop) can be open for longer hours, but these are often unpredictable and done as a gesture of goodwill by the shopkeeper.

In some areas, there are also challenges around post office closures. Many post offices in the smaller islands are attached to other local shops, which occasionally shut down or reduce their service offering. However, this issue is highly localised, and many islanders feel they have access to multiple post offices as long as they're willing to travel.

Those living in Stornoway and Kirkwall also raise concerns around the upcoming franchising of the post offices in both areas. They worry that this might imply a future closure, or that new owners might change the location of the post offices or make cuts to staff or opening hours.

There are also some challenges around the physical accessibility of post office buildings (i.e. for wheelchair users) – this was particularly mentioned in Lerwick, but residents had recently seen an improvement when the post office opened up in a new building, as the old building had been down a flight of stairs that was inaccessible to many.

"The one problem that we do have is the people that bought the local post office, which would give me a sort of like 20, 25-minute walk to the post office, he actually shut the whole shop down. [...] Now for people to get the other post office on the mainland, you have to get a bus into town which is like an hour and then for like for an hour you're kicking around and then getting the bus back. So, it's like three hours, three hours, if you have to go to the post office." – Interview participant, Shetland

Spotlight: Post office access

*"Now it closes at 12:00...
when you've got
livestock, you're rushing
around making sure
everything is fed and
watered... by the time
I've finished all that, the
post office is closed."*

Alice* lives in a smaller island, managing a small collection of livestock and producing artwork of her surroundings.

Alice regularly used the postal service to send packages, both personally and for her small business selling artwork and wool from her sheep. She always used Royal Mail to do this, as it can be difficult getting couriers to collect packages from such a remote location.

Her local post office has recently cut its afternoon opening hours, which can be challenging for Alice due to her responsibilities with her animals in the mornings. With the next closest post office a 30-mile round trip, and her post office being the only place to locally withdraw cash, this reduction presents a significant challenge to Alice's ability to go about her daily life and to manage her business.

**Note names have been changed to protect anonymity*

The impact of postal challenges

Participants experience many negative impacts as a result of the challenges they face around post, including:

- A higher mental load and having to spend much more time thinking about the logistics of post than people living in mainland Scotland usually would.
- Greater costs for certain goods and services which are impacted by surcharges.
- A lack of choice when it comes to selecting goods and services.
- Lesser access to essential goods and services.
- Impacts on small business production, making essential items more expensive and causing delays.

Mental load

For all participants, the primary impact of the postal challenges they experience is the mental load of managing their post. Across the islands, participants are spending a lot of time thinking about their post, and as a result are generally very knowledgeable about the way the post works in their areas. For example, participants spontaneously mentioned the route their post takes, the hours of their local post office or sorting office, or the existence of the Universal Service Obligation (USO) for post.

Islanders also spend a lot of time thinking about and dealing with issues that arise around post. The additional mental load includes closely tracking their packages, calling providers and planning logistics, or recruiting friends, family and neighbours to help them secure goods from the mainland when they visit. This is of particular concern to small business owners, who often are spending a lot of time tracking down and managing customer concerns when packages are moving slowly.

However, islanders are used to managing these challenges. Participants don't necessarily recognise how much time they are spending thinking or working to make the postal service work for them, and don't always consciously recognise the management of these issues as a negative experience.

"As soon as you put your postcode it jumps from £6 to £15 to £16. On a number of occasions we've taken to doing a click and drop delivery option, then arranging our own collection via Royal Mail or a local courier... you arrange a pickup option then arrange for Royal Mail to deliver it." – Workshop participant, Na h-Eileanan an Iar, Small business

Impact on costs

Parcel surcharges make purchases much more expensive, sometimes out of reach for participants. This feels unfair to island participants, as goods coming via post are much more expensive for them than they are for people in mainland Scotland or the rest of the UK.

Parcel surcharges coupled with the generally higher costs of goods bought on the islands, lead to an increased cost of living for islanders. They also increase the costs of production for small businesses, which means they have to charge more for goods and services than their counterparts on the Scottish mainland. Participants feel this also contributes to higher prices on the islands.

Secondly, participants also complain about the rising costs of postage stamps, reflecting the broader frustration seen in Thinks Insight & Strategy and Consumer Scotland's research with low-income rural consumers². However, this frustration is more muted than their mainland counterparts, as islanders generally recognise that they get good value for stamps compared to people living in other parts of the UK, considering the extra travel required for their post to reach them.

"It's basically an island premium I suppose, because it costs more to get things up here, so we end up paying extra." –

Interview participant, Orkney

Lack of choice of parcel providers and goods

The combination of parcel surcharges and the fact that some items or businesses don't deliver to the islands reduces the amount of choice of goods available to islanders.

While post offers them more choice than they would have only buying in-person on the island, this choice is much more limited than it is for people living in mainland Scotland.

Participants say they prioritise shopping from brands or businesses they know will deliver (quickly and cheaply) to the islands, and will look to those businesses first before shopping around for the full range of goods available. However, this means that getting hold of very specific or niche items can be challenging, and often requires higher costs or planning weeks or months ahead, if islanders need to coordinate with a visit to the mainland.

² <https://consumer.scot/publications/post-and-low-income-rural-consumers/>

Spotlight: Restricted choice

"Postage to anywhere on the mainland was £4.99, postage to Shetland was £24.99... I had to get them off Amazon. It was devastating because I would have loved to support the small business, but for an extra £20?"

Emily* lives in Lerwick and likes the convenience of shopping online, particularly for items that are harder to source on the island.

She regularly buys and sells plants online and recently tried to make an order for a set of specialist plant pots from a small business that she has supported for a long time.

The postage fee for this order was £4.99 to anywhere on the Scottish mainland, but £24.99 to Shetland. It's not clear to Emily why this markup was necessary, given it was a lightweight order that should not have been hard to transport.

Emily ended up making the same purchase significantly cheaper on Amazon, not able to justify the additional cost despite wanting to support the small business.

**Note, names have been changed to protect anonymity*

Impacts on accessing essential services

Slow and inconsistent post causes delays to the services that islanders use, both for their personal and small business use.

One of the main issues participants face is around delays to accessing healthcare, as letters about appointments arrive with very short notice, or sometimes after the appointment was due. Short-notice appointments are challenging for participants to manage, as they often need to organise travel to a larger island or the Scottish mainland, which can be time-consuming and expensive. These last-minute visits also cause pressure on local health and health transport teams, and can have far-ranging impacts including expensive medication going out of date and needing to be destroyed.

"So there have been some days that I've actually received a hospital appointment through the post on the day that I was meant to go for the appointment." – Interview participant, Shetland

While less common, legal post is also impacted by postal challenges, as it often needs to be handled physically (i.e. with wet ink signatures) within a specific time frame. This makes it challenging for the public and for small business owners to predict when post will arrive to its destination, accounting for slow speeds and inconsistencies that mean it could arrive much faster, or slower, than expected.

The electoral offices also experience issues sending ballots to islanders, especially in the case of unexpected by-elections. This process is very expensive to manage, as the ballots need to be sent by first class post. Despite the expense to go through a faster product, delays to the first class post service means that ballots don't arrive to their destination in the required time frame.

Post office closures create issues accessing both postal services, as well as the other services that the post office runs such as banking, pensions and withdrawing cash, which can be essential on smaller islands. The closure of a post office also feels like a significant loss to the community, as it is often a place where people congregate and socialise, particularly older people.

These closures also mean that people have to travel further and longer to access those services – i.e. a 3-hour round trip on public transport – which requires more significant planning. Or having to travel further to get to a post office which is open for longer hours.

"We don't have a cash point in our little village, so I have to use the post office to get money out... so I can only do that when the post office is open." – Interview participant, Orkney

Impacts on small business production

Small business participants appreciate that the post allows them to easily buy essential items for their business, and ship their product out to a much broader customer base than they would find on their island.

However, small business participants are likely to see more significant impacts when there are issues with the post. Delays and unreliable post can mean:

- Essential production items do not arrive on time, which can delay their production, or mean that staff are unable to work for multiple days. This was the case for a food and drinks business, where delays to post sometimes mean they have to wait until their packaging arrives to move forwards with production, which can end up costing the business money.
- Items sent to customers arrive very slowly or get lost on route, which leads to a negative customer experience. Customers also struggle to understand the challenges with the postal service that an island-based business might face, and often hold the business responsible for delays, which causes financial and mental strain for small business owners.

- Legally required items or paperwork not arriving when expected, putting small businesses at serious risk of fines. When these items don't arrive as expected, business owners are unsure whether they are delayed or have been lost (i.e. in a sorting office), which gives them more limited recourse to address the issue.

Overall, postal challenges place an administrative burden on small business owners, requiring time and energy to follow up on potential issues. There is also an impact on small business' revenue, where stock or sold products are lost or need replacing.

Participants raise significant concerns around the impact on small businesses. Many islanders rely on small businesses, either as their income, as customers, but also as they are an essential part of the community. Many of the small businesses on the island support the rural economy, and help to preserve heritage through local craft (i.e. wool and Fair Isle knitting in Shetland).

Spotlight: Small business impact

"I have to be very careful I'm not giving an undertaking then they'll get an original document the next day, because I know I won't be able to honour it... it means I have to think much more carefully and not waste time."

Sarah* lives with her husband and sister on one of the small islands north of Shetland, from which she maintains a solicitor's practice.

Sarah finds the postal service to be highly unreliable, with letters she sends and receives consistently delayed, even when she pays for expensive guaranteed delivery.

Sarah therefore avoids using the post for her business as much as she can, preferring to scan and email documents instead. However, as part of her practice she must sometimes send physical 'wet ink' documents, which legally must arrive at their destination by an appointed time. Sarah must factor these delays into the sending of these documents, something which takes time and adds a significant mental load to operating her business.

**Note names have been changed to protect anonymity*

How islanders manage postal challenges

Participants use a range of strategies to manage these impacts, by avoiding using post, planning far ahead and paying more for their post.

Avoiding using post

Many participants say they get around the challenges of post by doing as many activities as they can online, instead of sending and receiving letters. As internet speeds are generally very good across the islands, they find this is easier, cheaper and faster than using the postal service. Sending correspondence or managing activities online is also more reliable, so participants are sure that they won't have got lost, unlike the occasional letter or bill.

Some get around the additional costs or inability to order goods to the islands by waiting until they visit the mainland to buy the items they need. Some are also using these opportunities to collect items on behalf of friends and neighbours on the island. While they can usually combine this journey with a visit to see loved ones, or to visit a hospital on the mainland, this does mean they have to wait much longer to access the items they want to buy.

"I very rarely send mail out, you know, the odd birthday card... Everything's email. We've got super-fast broadband on the island. The broadband here is better than most places on the mainland." - Interview participant, Shetland, Small business

Planning ahead

When they do need to use the post, for example, ordering an item online for a specific milestone or event, islanders say they have to plan much further in advance than people living on the mainland. In practice, this means often thinking two weeks ahead about what they are likely to need, to account for slower postal speeds to the islands.

Participants often plan their post around these timetables – ordering parcels online in the morning so they have a better chance of getting on a ferry / flight the following day or sending a letter earlier in the morning.

For some participants, especially small business owners, it can be hard to predict what they are going to need two weeks ahead, which can end up causing delays to production or sending out their product.

Some also get around this by holding on to extra stocks of items they need – which ranges from specific pet food to extra washing machines. While participants did not explicitly talk about the impacts of planning and stockpiling, this will be contributing to islanders' mental load and finances.

"In the winter now I order everything like two weeks ahead, if I need it in two weeks, I order it now and if it's any later than that it's a panic." – Workshop participant, Shetland

"I need to think, things generally take two or three weeks to get here, sometimes more. So I've needed to think well in advance just because of the mail. I wouldn't have to if I was on the mainland." – Interview participant, Na h-Eileanan an Iar

Avoiding surcharges also means that it sometimes makes more sense for islanders to purchase items when they are off-island, either by ordering packages to friends' and family's homes on the mainland or buying them in person. While this often requires significant forward planning and creates huge delays in accessing goods, these are often seen as natural inconveniences baked into islanders' expectations around ordering certain items.

"I've just been lucky I suppose, I had to get my bed frame delivered to my mother in law's in Aberdeenshire and then collected it from there" – Workshop participant, Orkney

Shopping around

To be able to access goods, and avoid surcharges, participants prioritise using brands and websites they know will deliver to the islands, and particularly those that deliver cheaply. In most cases, this means brands that use Royal Mail services, or Amazon.

However, it isn't always possible for them to buy the specific item they want in these ways. This is particularly frustrating when it means that they miss out on deals or end up having to buy an item that is worse value for money overall which doesn't have surcharges attached. But sometimes, participants feel they have no choice but to go with the surcharge and bear the additional costs

"It just puts me off a transaction. So I had one the other day where it was going to be an extra 30 quid on top of a £60 product to send to Shetland. And I just found another website that would do it for free." - Workshop participant, Shetland

Paying for a more reliable service

Participants have little recourse to increase the delivery speed of their mail. Slow delivery speeds overall mean there is little point in paying for first class stamps, or other timed deliveries which are unlikely to arrive any faster than second class post due to those geographical and timetable limitations.

However, they can try to get more reliable service by paying more for certain stamps or services. The most common way participants do this are:

- Paying for an Amazon Prime subscription, so they can have free delivery, even if they live on a small island.
- Using Royal Mail Tracked 48, so they can use the tracking system to check where or when their post is likely to arrive at destination. This service promises delivery in two to three working days, but islanders feel they are

very unlikely to ever see this (this is also the reason they don't buy Tracked 24) and do not buy this stamp for speed.

This can also mean that small business owners have to purchase more expensive stamps so their customers can track their own post, and to cover themselves in the case of late or non-delivery.

"That's why we're paying the extra for tracking, so that when it does delay so can say there's the tracking number, look, you can see that I posted it and that's where it" – Workshop participant,
Na h-Eileanan an Iar

Addressing postal issues

In the workshops, participants co-created solutions to the issues related to post the people living on their islands are facing. We also shared some initial ideas for policy or local solutions with them (outlined in the figure on the following page), to explore their views on which would best address the challenges in the islands.

Principles for different solutions

When discussing participants ideas for change and proposed policy solutions, some clear principles for success emerged from these conversations. Participants felt strongly that any solutions or changes to the postal service for the islands should consider:

- Any solutions must attempt to **make things fairer for islanders**, while recognising the unavoidable geographical and climate challenges that the islands face. Solutions need to recognise that for example, post may never get to island addresses as quickly as it does on the mainland, but the postal service should aim to not disadvantage islanders (i.e. with unfair surcharges).
- **Learning from what works:** Across the workshops and depth interviews, participants are most enthusiastic about solutions that harness Royal Mail, which is embedded in the community and already provides universal coverage to the islands. They want to see an expansion of Royal Mail's services by getting more businesses and websites to use Royal Mail as a default, rather than other courier services. This would help them avoid surcharges, and would have an added benefit of improving Royal Mail's business and revenue.
- Solutions **must not dilute the service provided by Royal Mail and the Post Office**. Any solutions have to be adding to the services provided, and must not rely solely on the community (i.e. existing businesses) to deliver them.
- Suggested solutions should **take a local approach** – first understanding the local context, relying on local expertise, followed by tailoring to the unique situation of each island and community.
- **The postal service should seek to resolve key issues with services** before trialling new services or tech-y solutions, which participants worry wouldn't work in an island context. Specifically, participants felt Royal Mail should first consider what they see as the most significant challenges:
 - a. **Address staffing issues**, with participants wanting pay increase and improved working conditions for local postal workers. This would help both retain experienced and local postal workers, as well as recruiting more staff. Participants recognise that recruitment may be challenging

to do successfully considering housing issues across the islands, so wanted Royal Mail to focus on making these jobs appealing for locals.

- b. **Addressing lost and extremely delayed parcels:** Participants want Royal Mail to better keep track of where their parcels are, with better tracking and communication between different services and sorting offices – particularly around the Glasgow sorting office where many see challenges. They also feel this would help them keep track of where their post is, so they can raise a complaint when necessary.

Feedback on the potential solutions to postal challenges

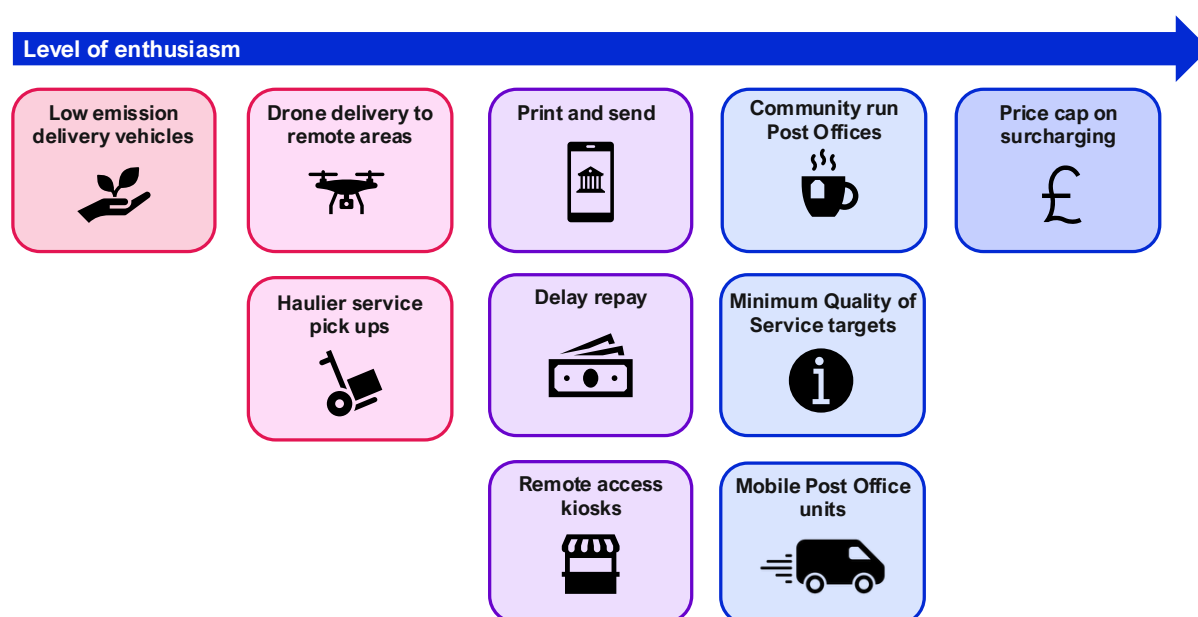


Figure 4: Level of enthusiasm for the different ideas shown to participants

Ideas participants are most enthusiastic about

£ Participants are very supportive of bringing in a **price cap on parcel surcharges**, to address the sometimes very expensive surcharges that islanders face. Bringing in regulation on this would make the postal service feel more equitable to participants and reduce the negative impacts they see from surcharges. Some participants are also surprised to hear there isn't already a cap in place. While most participants are very enthusiastic about a price cap, a small number feel that as it costs more to get goods to the islands, surcharges should be expected and shouldn't be funded by the rest of the UK.

"That's the way that applies to the price of first and second [class] at the moment, we'd be subsidised by the rest of Great Britain. We won't pay extra, so why not bring it in line." -

Workshop participant, Na h-Eileanan an Iar



Participants feel very positively about the idea of **community-run post offices** – as this is often what is already happening near them, particularly on smaller islands or in more rural communities. However, they do raise certain challenges with the way this set up currently works: they feel this can sometimes put pressure on existing businesses, who have to manage an additional branch of business, and feel there can be a lack of privacy in small spaces and small communities.

"We're very lucky that happens. The thing about that is its already post office staff that do that in a different location. But there are all kinds of things to consider with the post office around confidentiality and that sort of thing." - Workshop participant, Orkney



Most participants feel that the islands should be included in Royal Mail's **Quality of Service (QoS) targets**, and question why they don't already apply. They feel that applying QoS targets to Shetland, Orkney and Na h-Eileanan an Iar would make the postal service fairer to islanders, and help them receive as close to an equivalent service as possible to those living in mainland Scotland. If QoS targets are brought in for the islands, participants feel it is important that they allow for reasonably slower delivery times, recognising the impacts of both geographic distance and weather to how realistically fast post can get to the islands.

"When you open your can of beans up you don't expect to have half the beans in it just because you live in Orkney." – Workshop participant, Orkney

However, others are more cautious about applying QoS targets. They feel that Royal Mail wouldn't meet these targets anyway, and that they would be penalised for aspects such as weather or staffing that are generally out of their control. They have questions around how these targets would be enforced, and how Royal Mail would be penalised: would this cut funding for Royal Mail? Some even worry this could lead Royal Mail to end their coverage of the islands altogether as it is not financially viable.

"Targets, it makes you think somebody's doing something. There's lots of people creating targets and lots of people chasing them, but you wonder if it becomes an end in itself and people forget what it takes to actually work." – Workshop participant, Orkney, Stakeholder



Participants feel that **mobile post office units** would work well to bring the full host of post office services to people who would struggle to get to the post office otherwise. They also see potential for this in building back local communities, providing people with an opportunity

to socialise and supporting local businesses. Those who live the furthest away from a post office – particularly on smaller islands – are most positive about this option, and liken it to the mobile library service available on some of the islands.

Participants do raise questions about how often the mobile unit would come around and how the opening hours would be managed to make this actually useful for residents. Participants want reassurance around how the unit would manage distances between houses, as they feel the mobile units might not be in convenient locations and would still require a car to get to. Participants also have questions around whether a post office unit would be run by Post Office staff and offer full Post Office services (including banking, pensions etc).

"Shetland is actually a really big island, and the villages are very spread, so folks have quite a distance to walk to any central point in a village. We find with the mobile library that you can't just sit in a central point and expect folk come to you, particularly in bad weather. We end up having to go down to individual houses, so [a mobile post office] would have to do that." - Workshop participant, Shetland, Stakeholder

Ideas participants feel could work in certain contexts or conditions



Participants have many questions around the idea of **print and send**³, and struggle to see how this might work in practice where they live.

They appreciate that the experience would be the same for people who are receiving letters to their house, and feel that it might help some post arrive to destination faster. They feel it would be useful in certain contexts and for certain types of post – like passport applications or for small businesses managing invoices.

However, they also have significant concerns around the privacy of receiving post sent in this way, which would likely be printed by a shop near them by someone they probably know. This means they are reluctant to see this kind of service used for healthcare or financial related post.

Participants also worry that this type of service could be used for scamming or nefarious purposes, and want reassurances around protections for this. In addition to concerns about receiving post in this way, participants are also sceptical about sending post in this way. They note that much of the post they continue to send physically, they do so for a reason such as the sentimentality of handwritten birthday and Christmas cards, something they feel would be lost with a scanned and printed document.

³ A service that allows users to submit PDFs and other documents online which are then professionally printed and sent via Royal Mail (or another provider).

"That could be a good option for something, but it nothing that needs to be private, if you're printing it off somewhere near where it needs to go." – Workshop participant, Orkney



The idea of **delay repay** is received differently by participants. Those in favour of the idea feel it would put pressure on Royal Mail to meet targets for the islands, and work harder to give them better service, while compensating those who are impacted by delays or lost post. Those who do not like the idea feel it would require a lot of admin effort to claim that delay repay, which wouldn't be worth it for post like letters sent second class.

Those in Na h-Eileanan an Iar suggested a collective type of delay repay, where communities who are experiencing significant challenges with post receive a lump sum which can be used for community or charity projects. These participants are most supportive of the idea of delay repay, while participants in Orkney and Shetland have more concerns around the fairness of any delay repay systems.

Participants also have many questions about how this would be paid for by Royal Mail – would this take away from their funding and risk making their service to the islands worse?

"My impression is Royal Mail's been losing money hand over fist... rather than actually pay compensation for large scale disruption, it's surely better to prevent the large-scale disruption in the first place, which means looking at your systems and making sure that there's sufficient resilience there." – Interview participant, Shetland



Remote access kiosks are seen positively as allowing people to send post more easily, without having to travel as far to a post office. They also welcome the fact they would be accessible 24/7, or for longer hours than post office buildings. Some participants feel they would be helpful for receiving post when they are not at home – particularly younger people who are at work in the daytime – and would therefore welcome them in their area. However this is not of interest to those who live in more rural areas or small islands, where postal workers are always able to get packages delivered to the recipient.

However, participants worry about whether they would be accessible to digitally excluded people as well as those with visual impairments. They also worry that this kind of service could dilute existing post office services, and serve as an argument to shut down nearby post offices. Participants, especially in Shetland, also have questions around how these kiosks would deal with the harsh realities of island life – how would they resist strong wind and rain, how would they manage with internet outages? As with mobile post office units, they also worry about finding convenient and accessible locations for these kiosks to be built.

"It's going to be good for some people and good for some things, but I suppose it goes back to a lot of people already feel excluded, they don't really feel comfortable using thier cards... not necessarily just older folk, a lot of people struggle with technology." – Workshop participants, Shetland, Stakeholder

Ideas participants are less enthusiastic about



As discussed above in Journey of Post section, many people on the islands are already using **haulier service or community-run pick-ups** to get larger goods (i.e. in Orkney, where a local resident set up a business for collecting post from mainland Scotland). While there are some challenges with this current system, such as delays, costs, additional admin and issues with damage to some packages, participants don't see this set up changing as the hauliers provide a wide range of services to the islands. Those in Na h-Eileanan an Iar have more concerns around this, as they experience more challenges with haulier services than those in Shetland and Orkney (as explored in the [challenges with post section](#)). Generally, participants don't want to see more haulier companies becoming involved in this, and would instead prefer to see Royal Mail offering a wider range of services when it came to larger goods.

"We can get things to Inverness and get our couriers to bring them onwards, that's pretty much accepted... there's couriers coming across, it keeps them in work, it keeps the island connected. Paying £20 to get a parcel brough across, you've just got to do it." – Interview participant, Na h-Eileanan an Iar, Small business



Participants see that there are some applications for **drone deliveries** that would be helpful – particularly when it comes to delivering medical supplies in emergencies – but worry about the practicalities of using these day to day. They do see that drones could help get post delivered faster, particularly between sorting offices on different islands, and also see that they could be helpful for emergencies or issues like flooding when the roads are not usable. However, they do raise a number of concerns:

- The weather is often too poor for planes to land and fly, and participants assume drones would be unable to fly in fog or strong winds. They feel that these smaller vehicles would be more likely to be blown off course and to fall into the sea. The cancellation of the drone trial between Orkney and Shetland due to poor weather especially eroded trust in this as a solution for participants living in those areas.
- The drones might interfere with other essential flying services, such as passenger planes or rescue helicopters, with participants particularly concerned that drones may fly in and out of airports or airstrips.

- Drones seem expensive to manufacture, maintain and run, especially as they require two members of staff to man them at any time. This feels especially frustrating in Orkney and Shetland where Royal Mail are experiencing staffing issues, as they would prefer this manpower to be working on traditional deliveries by foot or van.
- Some worry about the practicalities of loading and un-loading the drones, especially in remote locations or if they are delivering to individual homes. They feel that most remote homes would be likely to have their mailbox further down the road to avoid long trips for the postal worker anyway, so this won't be saving much staff time anyway.
- Islanders do not feel warmly about a technological solution, and some feel that residents would shoot down or damage the drones out of protest.

"They tried to test it and do press interviews in Orkney, but they had to postpone because the drone hadn't made it. If the drone can't make it to do press interviews, it's not making it across the sea! The mail is going to end up missing." - Workshop participant, Shetland, Small business



While **low-emission delivery vehicles** are a nice idea which chimes with many participants' environmental mindset, there are concerns around the practicalities on the islands. Participants assume that these would be electric vehicles, which they feel would be challenging to charge with few plug points and few locations which could host plug points. As postal workers need to travel long distances on their rounds, participants worry that vehicles would be unreliable or run out of charge. They also want Royal Mail to prioritise repairing and maintaining existing vehicles, and worry about the cost implications of replacing the existing fleet.

"Electric cars have come a long way but the commercial stuff seems a long way away and the weight, it's not able to deal with it. The man who came and put a smart meter in for me about six weeks ago, he charged his van, which was only a transit van size, three times between Motherwell and Scrabster. That's no use to man nor beast." – Workshop participant, Orkney, Stakeholder



Prioritising ferries over flights for post is seen as unrealistic and causing further delays, as the ferries are already oversubscribed, and don't have enough space or the capacity to carry mail.

"I don't think they'd have enough space on the ferry anyway. Really. Due to the fact that, I mean there's a lot of people like, can't even get car spaces like booked on like two months in advance." – Interview participant, Shetland

Conclusion and implications

People living in the islands are reliant on post to access goods and services that are difficult to access in the islands. Post allows small businesses to operate, and gives consumers better access to services such as banking or healthcare, as well as items that are not available on their island.

However, islanders experience a number of challenges around post, particularly around speed and delivery inconsistencies. Some of these are expected from the geographic and weather limitations of living on a small, and sometimes distant island. But other issues are caused by system failures, which feel unfair to islanders and can have significant impacts. These issues surround delays at the Glasgow sorting office, and staff shortages or inexperienced staff. Islanders also don't have access to the full range of courier services available on the mainland, and many need to rely on local couriers and hauliers, which are expensive and range in speed and reliability.

Islanders also face additional costs around post, particularly with parcel surcharges which impact a large amount of providers and businesses, and make life for islanders more expensive than it needs to be. This, combined with restrictions around what businesses do and don't deliver to the islands, means that islanders are having to shop from a much more limited range of goods.

As a consequences of these challenges, many islanders spend significant time thinking about post, planning ahead and managing some parts of the postal journeys themselves. Some are also choosing to avoid using post where possible, managing with emails, or waiting until they are on the mainland to go shopping.

When it comes to advocating for solutions that will address these postal challenges, participants want Consumer Scotland to prioritise advocating for:

- Solutions that will make things fairer for islanders and remove disadvantages such as parcel surcharges.
- Continuing to improve on the services that are already working, for example, by expanding Royal Mail's coverage across businesses and websites as they already consistently and affordably deliver to the islands.
- Tailoring solutions to the local context, and relying on local expertise before rolling out any policy and technological solutions.
- Protecting current access to service, and not using any potential solutions as a reason to remove from Royal Mail and the Post Office's coverage.
- Resolving key issues with services, specifically by addressing staffing issues on the islands, and addressing lost and extremely delayed parcels.

Based on these findings and guidelines from participants, we have identified a number of implications for Consumer Scotland' policy and advocacy work on this topic. Specifically, Consumer Scotland should:

- Work to clarify and communicate the responsibility for goods that are lost or damaged in the post. This is particularly relevant for post which changes hand between national providers and local couriers or hauliers.
- Protect and expand the role of Royal Mail, as they already have the infrastructure in place which works most of the time. Expanding the coverage of Royal Mail to more businesses and websites will also address the key challenges around surcharges and the unavailability of certain products, which are the most frustrating issues for many participants.
- Provide advocacy and support around staffing issues on the islands, which cause significant challenges on the islands and are top of mind for many participants.
- Work with Royal Mail on issues around the Glasgow sorting office, which leads to sometimes significant delays. Participants strongly feel that issues since the sorting office changed have not been resolved.
- Focus on inconsistent delivery speeds as a priority, as these have a greater impact on participants and their ability to plan ahead. While participants would like to see faster postal speeds generally, there are more physical limitations to this, and many islanders see these as part and parcel of island life.
- Focus on reducing the burden of thinking and planning around post. While this cannot be fully removed, improvements to tracking systems, and better complaints and refund processes will remove some of time and mental burden required of islanders (and all customers).

Appendix

Full sample frame

Consumer sample

Category		Workshops			Interviews	Total
		<i>Na h-Eileanan an Iar</i>	<i>Orkney</i>	<i>Shetland</i>	<i>Remote islands</i>	
Gender	Male	5	8	3	4	20
	Female	5	5	10	6	26
Age	18-24	0	3	5	0	8
	25-44	4	4	1	3	12
	45-64	3	5	4	6	18
	65+	3	1	3	1	8
SEG	ABC1	4	7	6	6	23
	C2DE	6	6	7	4	23
Small business		4	3	4	5	16
Total		10	13	13	10	46

Stakeholder sample (demographic information not collected as stakeholders representing organisations rather than themselves).

Category	Workshops			Total
	<i>Na h-Eileanan an Iar</i>	<i>Orkney</i>	<i>Shetland</i>	
Stakeholder	2	2	4	8

Stakeholders across the three island areas represented the following types of organisations:

- Local and community councils
- Trade organisations
- Community services and charities
- Libraries
- Electoral registration offices

Issue by island area

The report above explores the issues that participants face when it comes to post, as well as the impacts and solutions they would like to see. Detail is provided throughout on how these issues play out in each of the three island areas covered by this research.

For simplicity, we have provided a short list of the issues that participants experience in each of the three island areas. More detail on each of the issues can be found in the main body of the report.

Na h-Eileanan an Iar

Delivery speeds

- Participants experience slow delivery speeds to Na h-Eileanan an Iar, especially to the non-mainland islands. Here, these are caused by:
 - Weather and distance.
 - Cancelled flights and ferries causing delays.
 - Post getting stuck in the Glasgow sorting office.
 - On remote islands, multiple hand-offs between different providers and couriers cause additional delays.

Reliability issues

- Participants experience issues with post routing, with mail to the island going through Birmingham or Edinburgh which causes delays, usually due to confusion around postcodes.
- Participants experience issues with local hauliers / couriers damaging items.
- They also experience issues with mail getting lost due to:
 - Issues at the Glasgow sorting office.
 - Issues with transfers between hauliers and couriers.
 - Participants receiving false delivery confirmations from local couriers.

Post Office issues

- In some locations, Post Offices have limited opening hours, which cause inconvenience to participants.
- The franchising of the Post Office in Stornoway has led staff to be moved to zero-hour contracts, and be working reduced hours which has impact on the level of service participants receive.

Cost issues

- Participants experience parcel surcharges, which even impact small envelopes, not just larger mail. While these are lower for smaller parcels (£15), they quickly rise to £50 for larger packages.
- Participants often have to organise hauliers themselves to transport parcels to the island when businesses cannot send their parcels via Royal

Mail – incurring these additional costs. If they want to make a return, they have to, again, organise and pay to ship damaged or unsuitable goods.

Other issues

- There are bans on certain products reaching the isles as they have to travel by plane, making it difficult for islanders to buy everything they need.
- Parcels get delivered to depots rather than to people's homes which requires participants to travel to collect them.
- Some businesses refuse to deliver to the islands as they only use couriers that do not deliver to the islands.

Orkney

Delivery speeds

- Participants experience slow delivery speeds to Orkney, especially to the non-mainland islands. Here, these are caused by:
 - Weather and distance.
 - Post getting stuck in the Glasgow sorting office, but also occasionally in locations like Dundee.
 - Staffing issues (i.e. illness, agency staff) causing significant issues at the final mile.
 - On remote islands, multiple hand-offs between different providers and couriers cause additional delays.
- Participants experience delays to post sent within Orkney, as it sometimes travels to mainland Scotland and back rather than staying within Orkney.
- Delivery speeds are irregular, with more recent post overtaking older post.

Reliability issues

- Post delivered by agency or new staff who don't know the local area can get lost.
- Participants experience issues tracking post and parcels, receiving incomplete or incorrect information.
- The local community has to sometimes rely on community-led workarounds and solutions to track down lost or delayed post.

Post Office issues

- Franchising of the Post Office in Kirkwall leading to concerns around future closure or staff dropping down to reduced hours.
- In some locations, Post Offices have limited opening hours. Morning-only opening hours can be particularly challenging for those in agricultural work.

Cost issues

- Participants experience parcel surcharges which range from £15 to £50 depending on the provider and size of package.
- Participants have to organise and pay for hauliers to transport larger parcels to the island.

Other issues

- There are bans on certain products reaching the isles as they have to travel by plane, making it difficult for islanders to buy everything they need.
- Some businesses refuse to deliver to the islands as they only use couriers that do not deliver to the islands.

Shetland

Delivery speeds

- Participants experience slow delivery speeds to Shetland, especially to the non-mainland islands. Here, these are caused by:
 - Weather and distance.
 - Post getting stuck in the Glasgow sorting office, although this is now working better than previously.
 - Staffing issues (i.e. illness, agency staff) causing significant issues at the final mile.
 - Closure of local sorting offices meaning that post is sorted in Lerwick, which leads to slower delivery speeds.
 - Old vehicles breaking down.
 - On remote islands, multiple hand-offs between different providers and couriers cause additional delays.
- Post leaves the islands more slowly than expected, even when accounting for ferry and flight timetables.
- Delivery speeds are irregular, with more recent post overtaking older post.
- Local hauliers deliver parcels at varying / unreliable speeds as their haulage depends on demand.

Reliability issues

- Some mail gets damaged on route, which participants feel is due to rough weather impacting ferries and multiple hand offs between providers.

Post Office issues

- Some local Post Offices are closing down, leaving people with long travel distances.
- In some locations, Post Offices have limited opening hours, with some only open for a couple of hours per week.

- There have been issues previously with the physical accessibility of the post office, which made it challenging for disabled or older people to access.

Cost issues

- Participants experience parcel surcharges between £10-£30 depending on the provider and size of the parcel.
- Participants have to organise and pay for hauliers to transport larger parcels to the island.

Other issues

- There are bans on certain products reaching the isles as they have to travel by plane, making it difficult for islanders to buy everything they need.
- Some businesses refuse to deliver to the islands as they only use couriers that do not deliver to the islands.
- Some face issues with local postal infrastructure, with one community's only post box having rusted through and not been replaced, making it unusable to residents.