

Study by WIK-Consult “User Needs in the Postal Sector”  
on behalf of

European Commission, DG GROW

## Questionnaire for postal users

### Introduction

1. Please select the stakeholder group you belong to:
  - Consumer association or association representing special interest groups (CON)
  - Business or business association (BUS)
  - Public institution or public authority (PUB)
  - NGO / charity
  - Online retailer / retailer or e-commerce association (ECOM)
  - Publisher or publishers' association
2. Please state the country your organisation is based in:
  - List all EU Member States, EEA countries, Switzerland
  - EU level

*[If you are active in more than one Member State, please complete a separate questionnaire for each Member State you are active in.]*

### Future expectations

#### Purposes for sending mail

3. For which purposes do you / your members send or receive mail today? Please select up to 5 purposes
  - deliver / return goods
  - marketing and managing customer relationships
  - billing and payment
  - communication with other businesses / public institutions

- communication with customers / citizens
- send greetings, invitations, etc. on festive occasions or holidays
- distribution of newspapers / magazines, etc.
- social interaction with other people

others (please explain) \_\_\_\_\_

4. For which purposes do you expect you / your members will be sending or receiving mail in 5-10 years? Please select up to 5 purposes
- deliver / return goods
  - marketing and managing customer relationships
  - billing and payment
  - communication with other businesses / public institutions
  - communication with customers / citizens
  - send greetings, invitations, etc. on festive occasions or holidays
  - distribution of newspapers / magazines, etc.
  - social interaction with other people
  - others (please explain) \_\_\_\_\_

#### Drivers of demand

5. Please select the type(s) of mail you / your members are sending:
- Transaction mail
  - Office mail
  - Direct mail
  - Newspapers / magazines delivered by post
  - Consumer letters and cards
  - E-commerce goods sent as letters
  - E-commerce parcels
  - Business parcels (B2X)
  - Consumer parcels (C2X)
  - E-commerce returns
6. [Filter: Q5=transaction mail] For transaction mail, how would you rate the importance of each of the following drivers of demand?  
(Scale: very important, rather important, rather unimportant, not at all important, I do not know):
- price / postage
  - printing and finishing costs (enveloping, franking, sorting, etc.)
  - changes in demographics and digital skills
  - availability of physical addresses

- security and reliability regarding the delivery of letters
  - requirements as to sending a formal / signed letter
  - availability of alternatives to letters
  - speed of delivery
  - comments \_\_\_\_\_
7. [Filter: Q5=office mail] For office mail, how would you rate the importance of each of the following factors of demand?
- price / postage
  - printing and finishing costs (enveloping, franking, sorting, etc.)
  - changes in demographics and digital skills
  - availability of physical addresses
  - security and reliability regarding the delivery of letters
  - requirements as to sending a formal / signed letter
  - availability of alternatives to letters
  - speed of delivery
  - comments \_\_\_\_\_
8. [Filter: Q5=direct mail] For direct mail (addressed advertising), how would you rate the importance of each of the following factors of demand?
- price / postage
  - printing and finishing costs (enveloping, franking, sorting, etc.)
  - changes in demographics and digital skills
  - availability of s physical address
  - security and reliability regarding the delivery of letters
  - requirements as to sending a formal / signed letter
  - availability of alternatives to letters
  - response rates
  - managing customer relationships
  - overall economic situation and prospects
  - comments \_\_\_\_\_
9. [Filter: Q5=newspapers / magazines] For newspapers / magazines delivered by postal operators, how would you rate the importance of each of the following factors of demand?
- price (including subscription fee and delivery)
  - printing and finishing costs (enveloping, franking, sorting, etc.)
  - changes in demographics and digital skills
  - availability of physical addresses
  - availability of alternatives to receiving news and information
  - speed of delivery

- deliveries on every working day
  - comments \_\_\_\_\_
10. [Filter: Q5=consumer letters and cards] For consumer letters and cards, how would you rate the importance of each of the following factors of demand?
- price / postage
  - printing, paper, envelopes, cards, etc.
  - changes in demographics and digital skills
  - security and reliability regarding the delivery of letters
  - requirements as to sending a formal / signed letter
  - availability of alternatives to letters
  - social and cultural habits
  - speed of delivery
  - comments \_\_\_\_\_
11. [Filter: Q5=e-commerce goods sent as letters] For e-commerce goods sent as letters, how would you rate the importance of each of the following factors of demand?
- price / postage
  - changes in demographics and digital skills
  - growth in e-commerce
  - full national coverage of postal network
  - speed of delivery
  - optional insurance
  - rising demand for small items from non-EU countries
  - comments \_\_\_\_\_
12. [Filter: Q5=e-commerce parcels] For e-commerce parcels, how would you rate the importance of each of the following factors of demand?
- price / postage
  - changes in demographics and digital skills
  - growth in e-commerce
  - full national coverage of postal network
  - speed of delivery
  - optional insurance/compensation for loss or damage
  - comments \_\_\_\_\_
13. [Filter: Q5=business parcels] For business parcels (B2X), how would you rate the importance of each of the following factors of demand?
- price / postage
  - full national coverage of postal network

- speed of delivery
- optional insurance/compensation for loss or damage
- reliability
- comments \_\_\_\_\_

14. [Filter: Q5=consumer parcels] For consumer parcels (C2X), how would you rate the importance of each of the following factors of demand?

- price / postage
- changes in demographics and digital skills
- growth in e-commerce
- full national coverage of postal network
- speed of delivery
- optional insurance/compensation for loss or damage
- reliability
- comments \_\_\_\_\_

15. [Filter: Q5=returns] For e-commerce returns, how would you rate the importance of each of the following factors of demand?

- price / postage
- changes in demographics and digital skills
- growth in e-commerce
- full national coverage of postal network
- optional insurance/compensation for loss or damage
- reliability
- comments \_\_\_\_\_

#### Relevance of postal product features

16. In 5-10 years, how would you rate the importance regarding the daily delivery of the following postal items (scale: very important / rather important / rather unimportant / not at all important / I do not know).

- Transaction mail (bills, statements)
- Office mail
- Direct mail (advertising)
- Newspapers / magazines delivered by posts
- Consumer letters and cards
- E-commerce goods
- Business parcels (B2X)
- Consumer parcels (C2X)

- E-commerce returns
- other (please name) \_\_\_\_\_

17. In 5-10 years, how would you rate the importance regarding the speed of delivery of the following postal, e.g. one or two days after posting? (scale: very important, rather important, rather unimportant, not at all important, I do not know)

- Transaction mail (bills, statements)
- Office mail
- Direct mail (advertising)
- Newspapers / magazines delivered by posts
- Consumer letters and cards
- E-commerce goods
- Business parcels (B2X)
- Consumer parcels (C2X)
- E-commerce returns
- other (please name) \_\_\_\_\_

18. In 5-10 years, how important will it be, in your opinion, that postal outlet networks in your country at least maintain its current density? (scale: very important, rather important, rather unimportant, not at all important, I do not know)

### Volume development

19. In your opinion, how will postal volumes develop during the next 5-10 years for the following mail categories?

- Transaction mail
- Office mail
- Direct mail
- Newspapers / magazines delivered by post
- Consumer letters and cards
- E-commerce goods sent as letters
- E-commerce parcels
- Business parcels (B2X)
- Consumer parcels (C2X)
- E-commerce returns
- [Show only types of mail which stakeholders have selected in Q5]

Scale

- strong increase (>20% in 10 years)

- slight increase (<20%)
- no change
- slight decline (<20%)
- strong decline (>20%)

### Market statistics

20. [Filter: Q1=ECOM] Please estimate the share of total e-commerce shipments sent as letters (and not as parcels) in your country: (%)
21. [Filter: Q1=ECOM] Please estimate the share of total e-commerce revenues that relate to goods sent as letters (and not as parcels) in your country: (%)

22. [Filter: Q1=ECOM] In 5-10 years, do you expect *cross-border* e-commerce shipments sent as letters to increase more than domestic e-commerce shipments?
- Yes
  - No
  - I do not know

### Cross-border e-commerce

#### Attitude and trust of consumers towards non-EU e-retailers

23. [Filter: Q1=CON] Please state whether you agree with the following statements: (yes / no)
- Consumers equally trust e-retailers from their home country and e-retailers from outside of the EU
  - Consumers equally trust e-retailers from EU countries and e-retailers from outside of the EU
  - Please elaborate

#### Expected impact of VAT on low-value e-commerce

24. [Filter: Q1=ECOM or ECOM\_ASS] Cross-border e-commerce volumes have increased substantially in the past. From 2021 onwards, import VAT will be charged on all imports from non-EU countries, including low-value imports (abolition of the de-minimis VAT rule). Do you expect that the introduction of import VAT on low-value imports in 2021 will lead to a...(please select)
- strong increase of "postal imports" to the EU
  - slight increase ...
  - no change ...
  - slight decline ...

- strong decline ...

25. [Filter: Q1=ECOM or ECOM\_ASS] What impact do you expect the introduction of import VAT on low-value imports will have on the overall **value** of e-commerce goods imported from non-EU countries to the EU by postal services?

I expect that the value of e-commerce goods, imported to the EU by postal service, will... (please select)

- not change
- increase slightly
- increase strongly
- decrease slightly
- decrease strongly
- I do not know

### Digital alternatives / substitution

#### Trust in letters vs trust in digital solutions

26. Compared to digital solutions, how important are letters to you (or the user group you are representing)?

- We mostly only use letters.
- We mostly use letters but digital solutions are becoming increasingly common.
- Digital solutions are more used than letters, but letters are still important in some areas.
- Digital solutions are more used than letters and letters are not very important.
- We mostly only use digital solutions.

27. [Filter: Q26/ options 1=Yes or option 2=Yes or option 3=yes] If letters are still important for the group you are representing, please briefly explain why:

Terms used for the following questions:

*Communication portals by private companies.* This refers to solutions applied by a single business for communication with its customers. These portals are often used to provide bills, statements or other customer information that can be downloaded.

*Secure digital mailbox systems.* This refers to solutions set up by e.g. governments, postal operators, or public institutions, that enable businesses, public institutions, etc. to send digitally signed communication to individuals.

28. Which types of digital communication do you / your members use? (yes / no)

- E-mail
- Communication portals by private companies
- Secure digital mailbox systems



- Other \_\_\_\_\_
29. [Filter: Q28/option 2=No] Please select 3 reasons why you do not use communication portals.
- Existing solutions are not suitable for our processes.
  - Legislation requires the sending of signed letters
  - Lack of nationwide broadband access to the internet.
  - Lack of digital skills of our partners / customers.
  - Security concerns about the protection of personal data.
  - Existing solutions are not user friendly.
  - Implementation is too expensive.
  - No need for digital solutions.
  - Other: \_\_\_\_\_
30. [Filter: Q28/option 3=No] With whom can internet users communicate through digital mailbox systems in your country?
- Nobody. There is no secure digital mailbox system in my country
  - banks, insurance companies, and other financial institutions
  - businesses
  - health care institutions like hospitals, health insurance companies, doctors, etc.
  - courts, lawyers
  - tax authorities
  - social security institutions
  - other public institutions
  - individuals
  - other: \_\_\_\_\_
31. In your opinion, what is the share of internet users in your country that currently prefer using secure digital mailbox systems rather than letters:
- 0%. There is no secure digital mailbox system in my country.
  - up to 5%
  - up to 10%
  - up to 20%
  - up to 50%
  - more than 50%
32. In your opinion, to which extent will businesses and consumers use digital communication in the future (5-10 years)?
- to the same extent as today
  - more than today but they will still rely on letters for certain purposes
  - digital solutions will be the main communication channel
33. In your opinion, what will the reasons be for the continued use of letters by businesses and consumers during the next 5-10 years?

(Text) \_\_\_\_\_

**Hybrid mail solutions**

Definition hybrid mail solutions: A business or public sector institution provides documents in electronic format to a supplier, the hybrid mail provider. The hybrid mail provider then prints and envelopes the physical letters, and delivers it (or agrees terms with a postal operator).

34. [Filter: Q1=BUS or Q1=PUB] Are you aware of any hybrid mail solutions in your country?
- yes
  - no
35. [Filter: Q34=Yes] Are you / businesses in your sector using a hybrid mail solution for sending mail?
- yes
  - no
36. [Filter: Q34=Yes] In your opinion, how will you / businesses in your sector use hybrid mail solutions in the future: In the next 5-10 years, we / businesses in our sector will use hybrid mail solutions...
- to the same extent as today
  - more than today
  - less than today

**Flexibility of universal service**

37. From your perspective, if the use of letters becomes less frequent in the future (5-10 years) what universal service features could be reduced? Please state the areas for which you would accept changes to universal services. (Select all that apply)
- Delivery and collection frequency
  - Speed of delivery
  - Density of access points
  - Service levels in rural areas
  - Scope of services within USO
  - Prices
  - Other: \_\_\_\_\_
  - Comments: \_\_\_\_\_

## Vulnerable users and societal needs

### Vulnerable users

38. [Filter: Q1=CON] Has the interest of vulnerable consumers regarding postal services been discussed publicly or at political level in your country?
- Yes
  - No
39. [Filter: Q38=Yes] In public discussions on postal users with vulnerabilities, which user groups have been identified as vulnerable? Please select:
- People with restricted mobility
  - Blind people or people with impaired vision
  - Inhabitants of rural or remote areas
  - Inhabitants of island areas
  - Other: \_\_\_\_\_
  - Comments \_\_\_\_\_

### Aspects of USO that are indispensable in view of consumers = minimum requirements

40. Please describe the aspects of USO that are indispensable in view of private and business users. (text) \_\_\_\_\_

### Societal needs

41. Please state the societal needs in your country to which the USO for postal services currently corresponds to (or should correspond). Please select up to 5 needs:
- delivery of medical samples, pharmaceuticals, etc.
  - delivery of e-commerce goods sent as letters
  - delivery of obituary notice letters
  - delivery of election documents
  - delivery of newspapers, magazines, or other media
  - delivery of bank cards, credit cards
  - delivery of court documents, enforcement orders, etc.
  - provide post offices / postal access points
  - enabling a nationwide communication channel
  - ensuring comparable living conditions nationwide
  - enabling reliable communication between citizens, businesses, and public institutions

- enabling an affordable communication channel to private users and businesses
  - other: \_\_\_\_\_
42. Please state the societal needs in your country to which the USO for postal services should correspond to in 5-10 years. Please select up to 5 needs:
- delivery of medical samples, pharmaceuticals, etc.
  - delivery of e-commerce goods sent as letters
  - delivery of obituary notice letters
  - delivery of election documents
  - delivery of newspapers, magazines, or other media
  - delivery of bank cards, credit cards
  - delivery of court documents, enforcement orders, etc.
  - provide post offices / postal access points
  - enabling a nationwide communication channel
  - ensuring comparable living conditions nationwide
  - enabling reliable communication between citizens, businesses, and public institutions
  - enabling an affordable communication channel to private users and businesses
  - other: \_\_\_\_\_

### Contact

43. Please provide the contact details of the person(s) who responded to this questionnaire.
- Name
  - Organisation
  - Email
  - Phone number