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BELGIAN INSTITUTE FOR POSTAL SERVICES AND TELECOMMUNICATIONS

PRESS RELEASE

Postal users want a high-standard service and are open to more modern postal applications

Brussels, 21 February 2017 - A qualitative study¹ conducted by BIPT shows that letter post has been largely functionalised in the meantime, parcels having assumed the postal items emotional value. Furthermore postal users attach importance to a close-knit, carefully located network of access points (postal offices, postal points, red letterboxes). Users are generally satisfied with the current postal network but less so with the service within the postal offices. The postal user believes that the universal service provider ought to evolve as well as regards efficient service. That is why they are open to modern postal applications and to certain changes in the universal service offer.

Every three years BIPT publishes a study on the needs of postal users. A survey was conducted with various categories of postal users at the end of 2016 in order to get an overall picture of the consumers' views regarding the universal postal service in Belgium. The survey aimed to map out the consumer needs, that might have changed, as well as certain trends from a consumer's point of view. Some of the principal questions in the context of this study are for instance: What are the needs of postal users regarding the universal postal service? What is the value of the different components of the universal postal service? What is the postal users' point of view towards the changes in bpost's universal service provision?

Postal users are generally satisfied with the current **postal network**. They attach great importance to a close-knit, carefully located network of access points to postal services. This regards both red letterboxes for sending and postal points and postal offices. Still postal users have quite a few frustrations as regards the service in the postal offices: not the least of which are the long waiting lines. These are often due to an insufficient number of counters that are open and a lack of distinction in the waiting line according to the required services. A system of separate flows is appreciated, but is not often implemented in practice yet so it seems. Another barrier are the limited (and rigid) opening times of the postal offices. On Saturdays private users expect a maximum complement of staff because it is just on those days that they have time to go to the postal office. Postal points are generally very much appreciated.

The study shows that **letter post** has been functionalised to a great extent. The administrative function dominates. Letters are associated with administration (invoices, insurance, ...) and unpleasant messages (e.g. registered items). Only a minority still attaches great emotional value to letter post, apart from occasionally for instance a holiday post card. An important effect thereof is that the sense of 'urgency' of letter post has greatly decreased. The D+1 routing time for regular letter post does not appear to be an absolute necessity for postal users. A D+2 standard service is a scenario postal users are prepared to accept, as long as this is associated with the option of a D+1 premium service. As regards registered items, urgency does play a role.

¹ Qualitative research is an empirical research method aiming to map out underlying motivations and perceptions regarding certain topics in a scientifically justified manner.

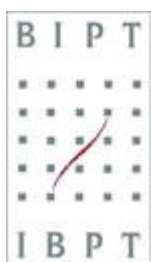
They are moreover considered to be one of the most important postal services, although users do not think its current procedure to be sufficiently smooth. Postal users are indeed very open to modern postal applications (e.g. track & tracing, printing their own stamps, ...) Users expect that the increasing digitisation shall reduce letter post to a “niche” service and that the parcel market shall evolve further.

Parcels are increasingly considered to be the reference for postal services and have taken over the emotional role of letter post to a large extent. Users want the universal postal service provider (at the moment bpost) to play a strong part on the parcel market, in which he should be allowed the room to be as competitive as possible through maximum flexibility (e.g. in determining the time of delivery). The automatic postal parcel machines are relatively unknown but the private persons who are already using them are convinced of their efficiency and user-friendliness. Liberal professions and SMEs are already highly convinced of the user-friendliness of the automatic postal parcel machines.

Users intuitively have a strong appreciation of the decrease of the postal volumes and the development of alternatives for the traditional mail. It is understood that the universal postal service provider is pressured by this, forcing him to look in other directions in order to stay competitive. It is also thought to be alright that studies are looking into that proactively. In general the postal user has the perception that **the universal service provider should evolve** along with the other postal operators **as regards efficient service**.

As a **future modification in the universal service offer** a decrease of the delivery frequency (to four or even three days a week) for classic letter post for the postal users would be the most acceptable scenario. SMEs would also find it acceptable to exclude bulk mail (sending letters in large volumes) in the universal postal service although users today only seem to know to a small extent for which volumes better prices can be obtained. A further scale down of the postal network would not (no longer) come as a surprise to the users and it would be acceptable to them provided that the access points to this network are situated at carefully chosen, well visible and easily accessible locations. Finally, abolishing the requirement to serve the entire territory at affordable and uniform rates encounters fierce resistance as it puts at risk the inclusiveness of the universal postal service.

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