



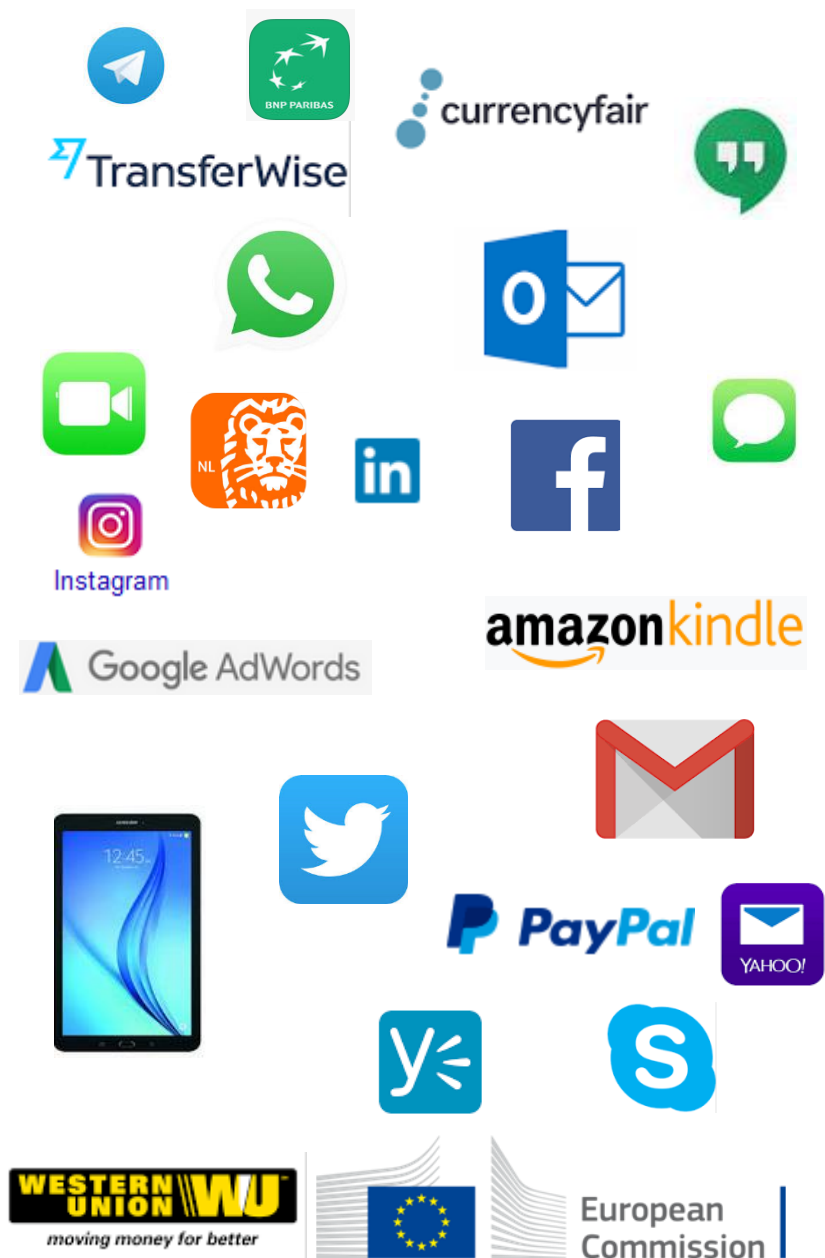
Evolution of user needs across postal markets and the future of the Universal Service

Copenhagen, 3 May 2018

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European Commission

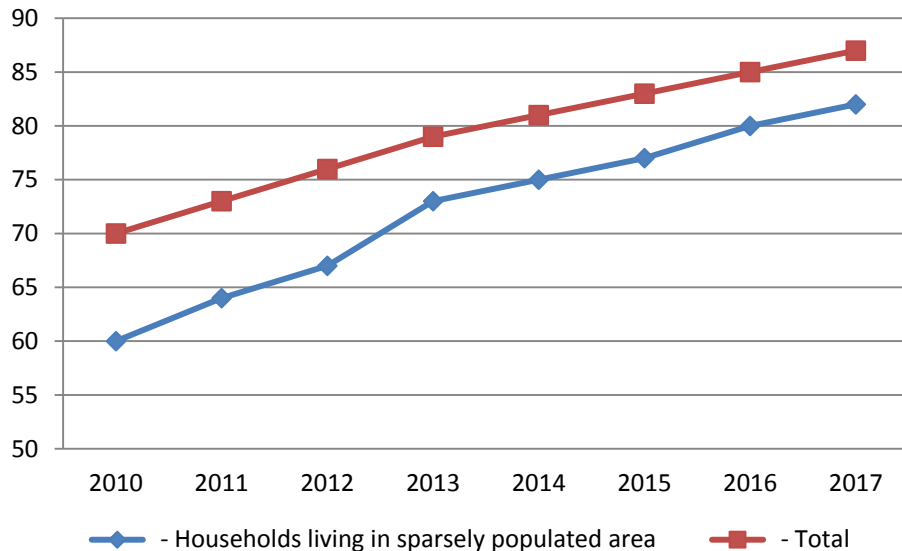
Communication: matrix in 1992 Green Paper... and in 2018

CUSTOMER SECTOR	COMMUNICATION NEED	COMMUNICATION MEDIUM		POSTAL DEMAND TRENDS
		NON-POSTAL	POSTAL	
LARGE ORGANISATIONS	FINANCIAL	Automated Banking Fax Electronic Mail EDI	Letters	(to large businesses) declining (to small businesses/ individuals) stable
	BUSINESS CORRESPONDENCE	Telephone Fax	Letters Express	Stable - but could decline Strong growth
	ADVERTISING	Television Radio Bill-boards Tele-marketing Newspapers Magazines	Direct Mail Catalogues	Strong growth
SMALL ORGANISATIONS	FINANCIAL	Fax	Letters	Growth
	BUSINESS CORRESPONDENCE	Fax Telephone	Letters Express	Growth
	ADVERTISING	Newspapers Magazines	Direct Mail Catalogues	Growth
INDIVIDUALS	TO BUSINESSES	Telephone	Letters Business reply cards	Growth
	TO INDIVIDUALS	Telephone	Letters	Stable

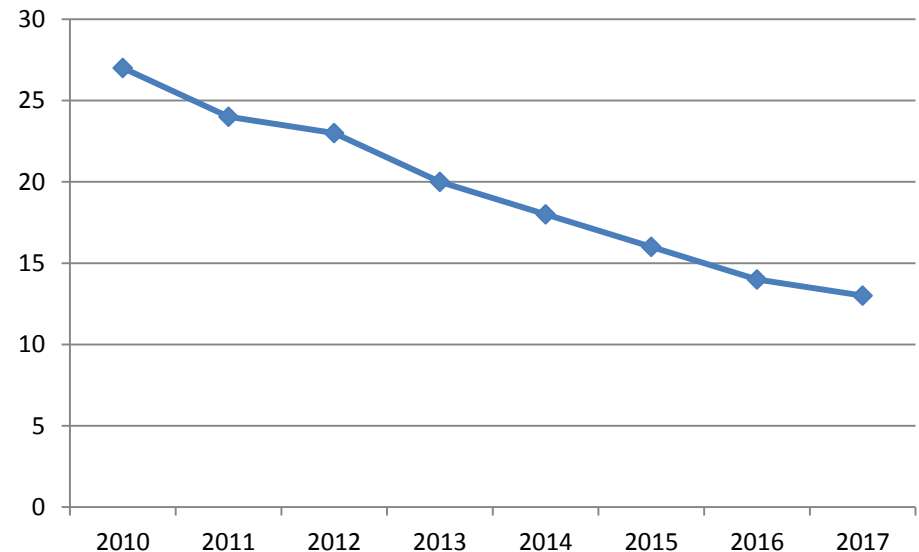


An evolving communication market

Internet access in
percentage of households
(EU average, source Eurostat)



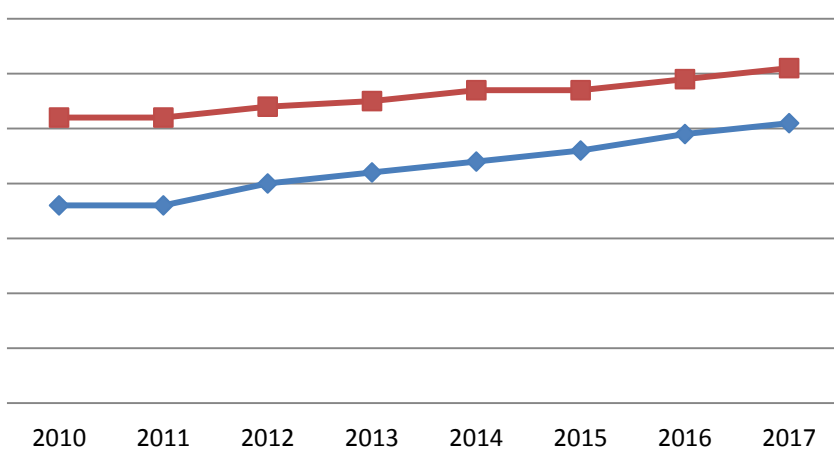
Individuals who have never
used the internet
(EU average, source Eurostat)



More electronic transactions

Internet Banking

Eurostat, EU average

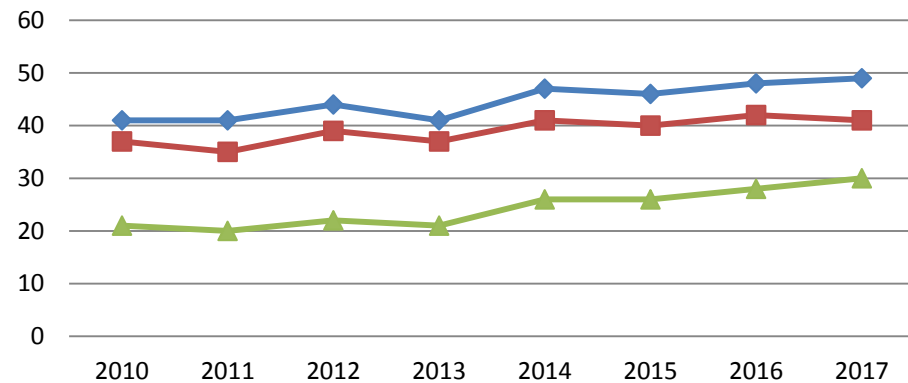


◆ Internet use: Internet banking - Percentage of individuals

■ Internet use: Internet banking - Percentage of individuals who used internet in the last 3 months

Internet use with public authorities

Eurostat, EU average

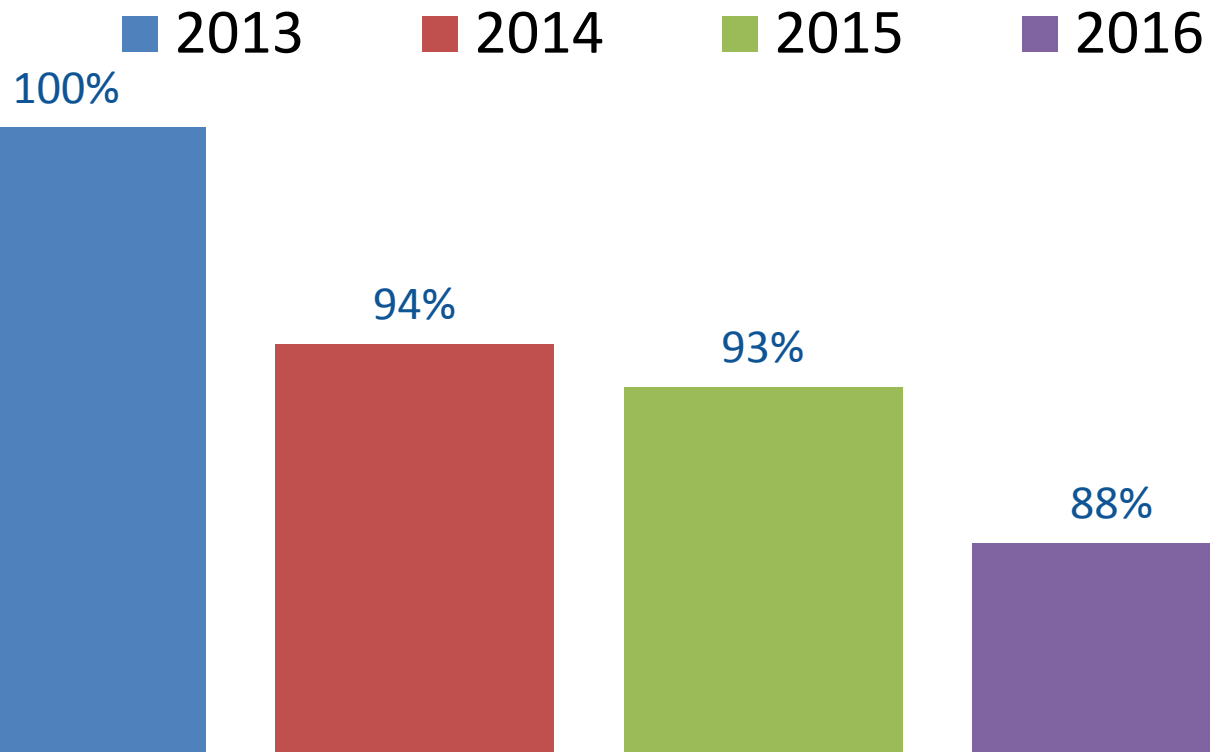


◆ interaction with public authorities

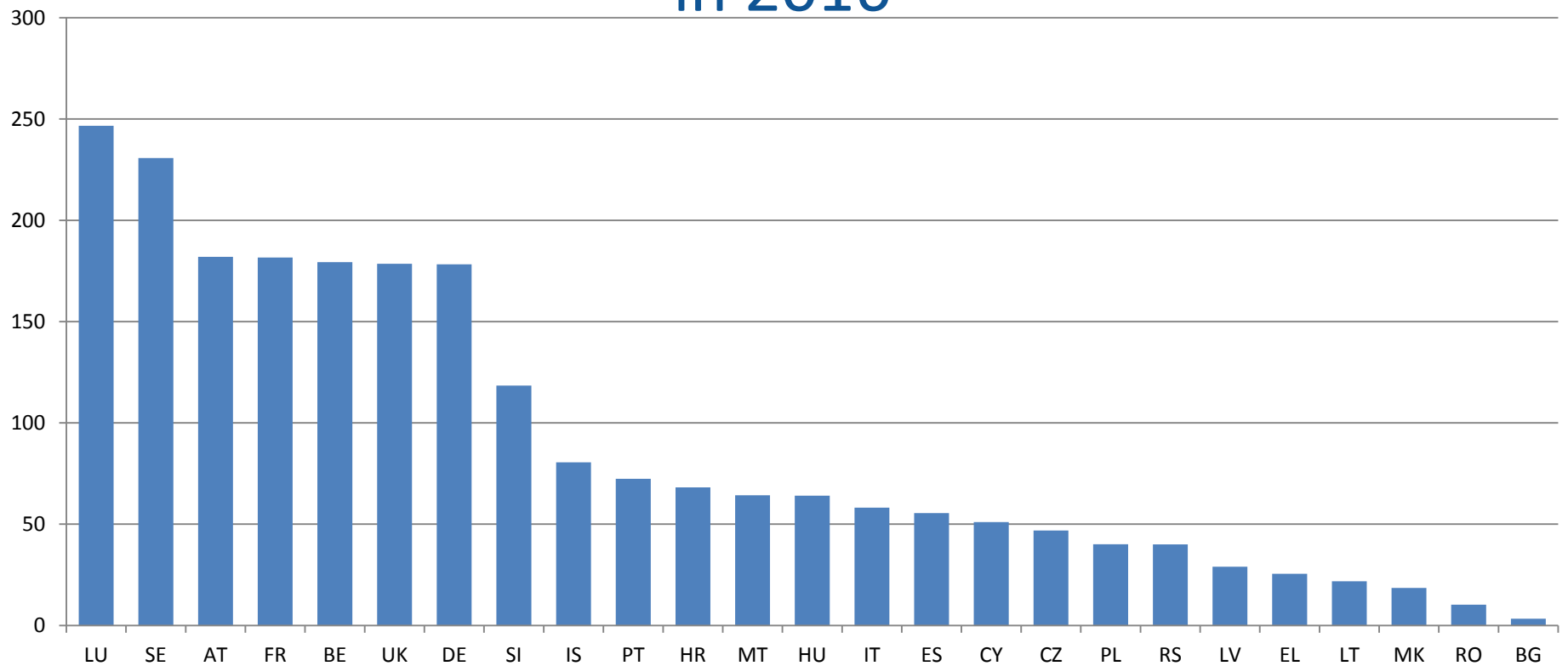
■ obtaining information from public authorities web sites

▲ Internet use: submitting completed forms

Change in letter mail volumes 2013-2016



Domestic letter mail volume per capita in 2016

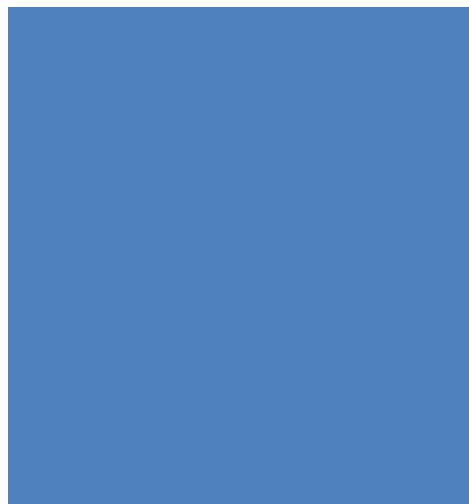


excluded : countries requiring confidentiality

Domestic parcel services per capita (simple average)

■ 2013 ■ 2016 8,7

6,5



Three sets of questions

- What postal services will tomorrow's users need?
- What postal services will be provided by market forces?
- What regulatory framework will be needed?