Commission for
Communications Regulation

Information Notice

ECORYS web-based customer needs survey for postal services

Comparison of responses from Ireland and other EU countries.

Document No:	**09/10**
Date:	**13 February 2009**

An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation
Abbey Court Irish Life Centre Lower Abbey Street Dublin 1 Ireland
Telephone +353 1 804 9600 *Fax* +353 1 804 9680 *Email* info@comreg.ie *Web* www.comreg.ie

Contents

1 Foreword [by the Chairperson]

As last year came to a close the European Commission published it's fourth biennial Application report[1] on the implementation of the Postal Directives. Earlier in the year a sector study on *Main Developments in the Postal Sector 2006-2008* was undertaken by ECORYS to inform the European Commission's report. Both documents are available on the European Commission website.[2]

In the course of undertaking its study ECORYS asked ComReg for help in identifying consumers who would be willing to participate in a short web-survey on customer needs for postal services. Thanks to the participation of subscribers to ComReg's website almost 40% of all respondents were from Ireland. Although ECORYS have supplied the 'raw 'results to participants who requested same a detailed analysis of the results focusing on a comparison between the needs of Irish consumers and those elsewhere in Europe is not yet in the public domain. This document, which has been prepared in collaboration with ECORYS, fills that gap.

Today (13 February 2009) ComReg organised a Postal Briefing at which representatives of the European Commission and ECORYS presented details of their reports with a particular emphasis on the key issues for Irish consumers.

Next month ComReg intends to hold a virtual symposium moderated by Professor Paul Kleindorfer, Distinguished Research Professor, INSEAD (Fontainebleau, France), and Anheuser-Busch Professor Emeritus of Management Science at Wharton, on the theme "Ensuring all consumers benefit from a competitive postal market next year". Further details will be announced shortly.

Following the decision of EC governments and the European Parliament to open postal markets to competition from the end of next year[3] the Irish Government will be preparing a Bill setting out a new regulatory framework for Postal Services in Ireland. The current framework for the postal sector was set out in the Post Office Act 1908. It has stood the test of time for over a century. The new Bill will set the framework for generations to come. All stakeholders have a part to play in ensuring that this new framework is robust enough to protect customer needs in the decades to come. ComReg's Postal Briefing today and its virtual symposium next month will help inform the debate.

John Doherty
Chairperson
Commission for Communications Regulation

---

[1] COM(2008) 884 final supported by Commission Staff Working Document – SEC(2008) 3076

[2] http://ec.europa.eu/internal_market/post/news_en.htm

[3] Directive 2008/6/EC of the European Parliament and of the Council of 20 February 2008 amending Directive 97/67/EC with regard to the full accomplishment of the internal market of Community postal services

2 Executive Summary

The Irish respondents to ECORYS' web-based questionnaire on customer needs are estimated to be responsible for 1 in 7 of all letters posted with An Post.

The responses illustrate the extent to which the Direct Mail market (including magazines, newspapers etc) is under-developed in Ireland – it is the most important mail product for only 10% of respondents compared with 56% in the rest of Europe.

This has a consequential impact on other areas of the economy. For example, only 44% of Irish respondents outsource some aspect of mail preparation compared with 65% in the rest of Europe, and only 24% use consolidation services compared with 48%.

Irish respondents to the ECORYS questionnaire have strong views, one way or the other about An Post – 45% are "reasonably satisfied" (or better) but 40% are "not really satisfied" (or worse).

Quality is the dominant / most important issue for 78% of Irish respondents, compared to 57% of respondents elsewhere. Pricing, also, is a key issue for over 60% of all respondents – Irish and other Europeans.

Next Day delivery is important to Irish respondents with 52% ranking it as the most important service aspect, and 88% requiring delivery 5 or 6 days a week

Complaint handling is also a significant issue with 35% of Irish respondents having "negative experiences" and 49% claiming "it takes a lot of time and effort from our side".

Some 50% of Irish respondents have switched from physical to electronic distribution during 2007, compared with 38% of European respondents – and 21% had switched more than 20% of the mail volume compared with 7%.

But this is not expected to impact on mail volumes with 40% of Irish respondents expecting growth during 2008 and only 20% expecting lower volumes. Indeed 13% of Irish respondents forecast growth of more than 20% in 2008. (N.B. The survey was undertaken in April / May before the full extent of the economic downturn was apparent).

Only 14% of Irish respondents claim to have a choice between two or more postal operators for their most important mail product, but 75% of these Irish respondents have switched some mail to another operator (compared with 81% in the rest of Europe. A warning note for An Post is that 26% of respondents in the rest of Europe, where letter services / direct mail are open to competition in many countries, have switched "most of my mail"

Customer expectations from future competition in Ireland are in line with the perceived benefits of competition in the rest of Europe – with 38% expecting "lower prices", 20% expecting "more choice" and 24% expecting "Improved customer orientation".

Lower prices will result in higher volumes. In response to a question on the impact of a 20% price reduction 13% of Irish respondents foresee a volume increase of 15% or more, 31% of 5% or more and 84% an increase of some size.

Even though outbound international mail has been open to competition in Ireland since January 2004 the use of alternative operators isn't as well developed as in other countries – with only 18% of respondents using an operator other than An Post compared with 30% elsewhere.

3 Background

Every two years the European Parliament and the Council of Ministers receive a report from the European Commission on how the Postal Directive is being implemented in the various EU Member States. To inform this year's report the European Commission engaged ECORYS, consultants based in the Netherlands, to undertake a study on The Main Developments in the Postal Sector (2006-2008), which was published on the European Commission website at the end of September.

In the course of undertaking this study ECORYS asked ComReg for help in identifying consumers who would be willing to participate in a short web-survey on customer needs for postal services. The letter from ECORYS was published on ComReg's website and an email alert sent to all registered subscribers. (The deadline for completion of the questionnaire was subsequently extended to 31 May).

The report for the European Commission draws extensively on the results of the web-based questionnaire. In particular the results of the "customer opinion" questions are summarised at pages 156-158 of the report. Almost 40% of all respondents were from Ireland and in the preface to its report ECORYS "highly appreciated the support from [ComReg]".

In addition to the use of the data collected in its report ECORYS has sent a copy of the "raw data for all respondents" to those who asked for it when completing the questionnaire.

ECORYS has also supplied ComReg with the "raw data for the Irish respondents" , including the results for the open question (Q54) asking about issues that require urgent attention by the national and/or EU regulatory authorities. The remainder of this report is based on an analysis of this data, and a comparison with the "rest of Europe" extracted from the EU level data..

4 Survey representative of most large users of mail services

Unlike the annual market research surveys commissioned by ComReg to ascertain the views of all Irish business and residential consumers this survey was targeted at business users of postal services and similar organisations. Q4 reveals that 16% of Irish respondents send 5 million items or more annually, while 45% send more than 50,000. It is a reasonable estimate that these 45% of respondents send more than 100 million items per annum or 1 in 7 of all items posted with An Post.

Q4. How many mail items did your company / organisation (or the typical company / organisation you represent) approximately sent in 2007?

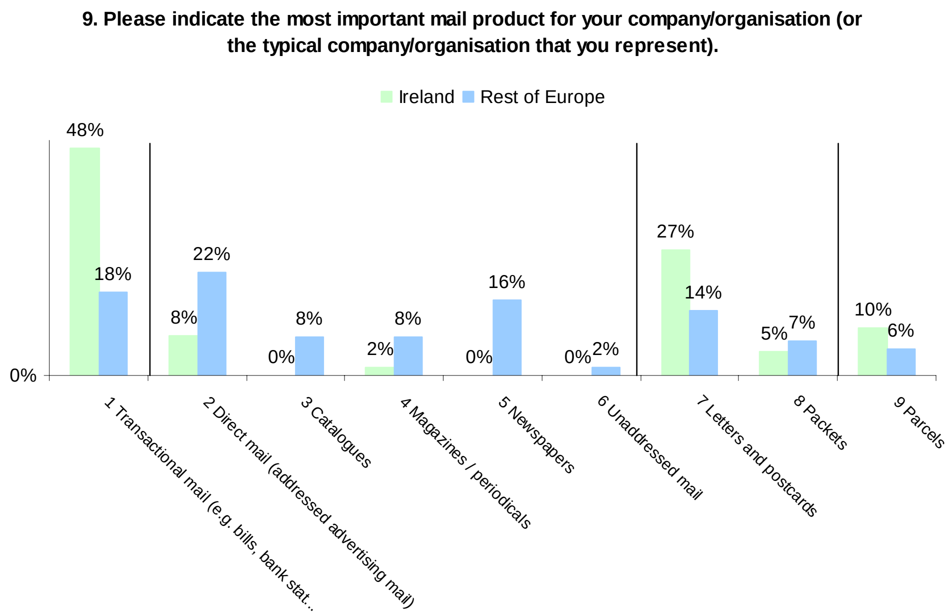
(Each respondent could choose only ONE of the following responses.)

	Percentage	
	IRL	ROE
1 More than 5 million items	16%	34%
2 Between 1 million and 5 million items	4%	16%
3 Between 250.000 and 1 million items	13%	10%
4 Between 50.000 and 250.000 items	12%	14%
5 Less than 50.000 items	55%	26%

By comparison according to this years' IMS Millward Brown survey only 2% of Irish businesses, and 9% of corporates, send more than 2,000 standard letters per week – 100,000 per annum. Therefore the results of the ECORYS survey are focussed on An Post's largest customers, while the annual market reviews are focused on Irish businesses generally, many of which do not use An Post (or other postal services) to any great extent.

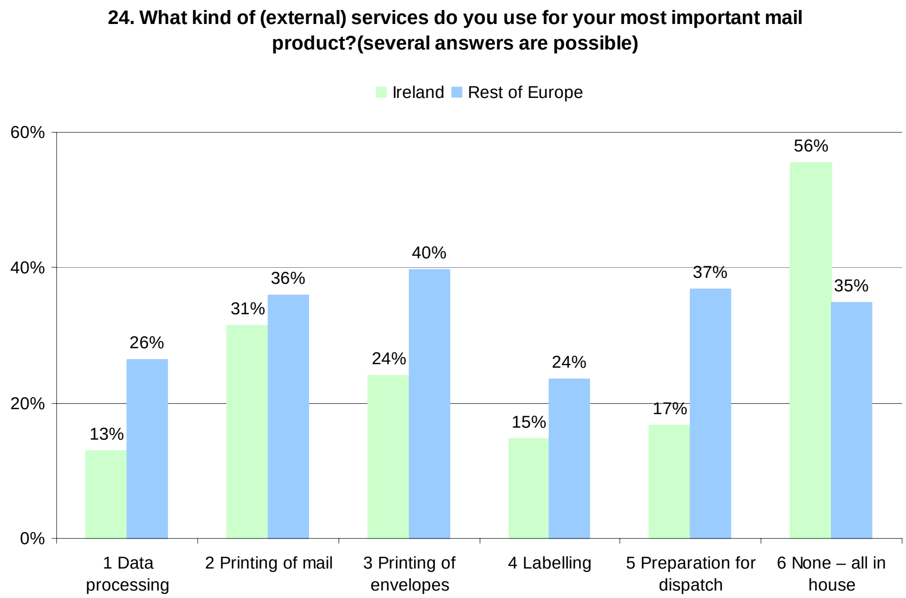
5 Direct Mail under-developed in Ireland

Two questions (Q3 about the type of organisation, and Q9 about the most important mail product) demonstrate the extent to which the Direct Mail sector is under-developed in Ireland. Only 6% of Irish respondents regard Direct Mail as the most important mail product compared with22% in the rest of Europe, and when similar products such as catalogues and magazines are included the percentages become 10% and 56% respectively. While it might be argued that this is due to different response rates rather than differences in the market the figures are consistent with the product volumes submitted by An Post and the levels of mail per capita (generally about half those in the larger EU member states).



6 Impact on other sectors of the economy

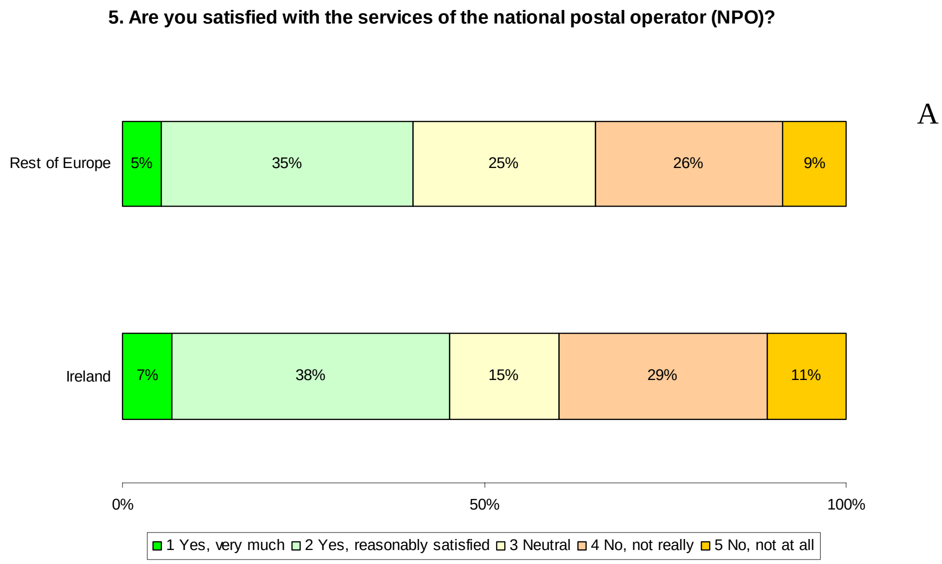
A series of questions show that this has an impact on other areas of the economy with Irish respondents less likely to outsource various services:



or to use consolidation services (24% compared with 48% - domestic services; 16% compared with 35% - international services).

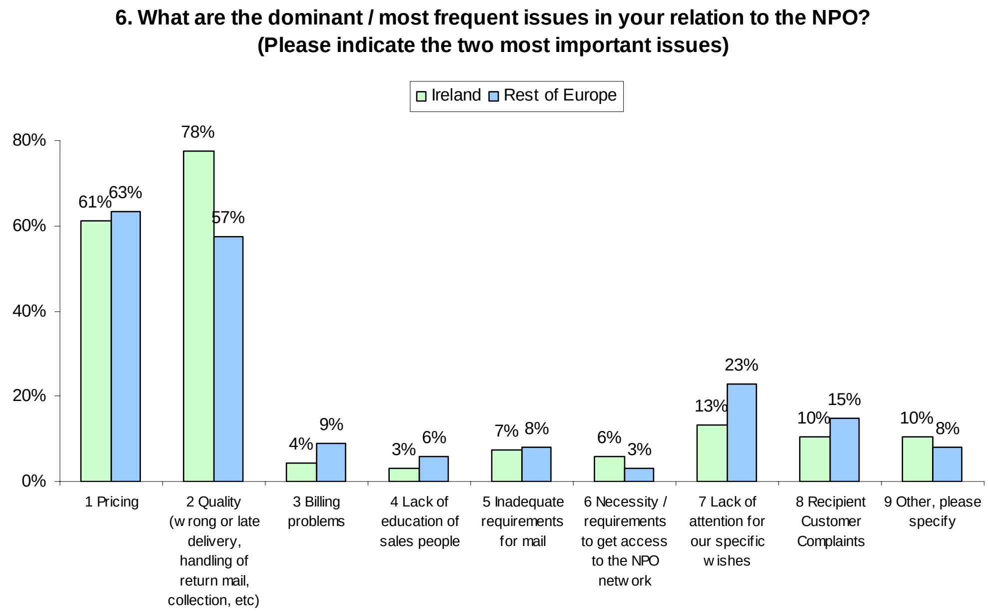
7 Opinions divided about An Post / National Postal Operator

Irish respondents to the ECORYS questionnaire have strong views, one way or the other about An Post – 45% are "reasonably satisfied" (or better) while 40% are "not really satisfied" (or worse). By comparison there is a much larger 'neutral' group of customers in the rest of Europe where the corresponding figures are 40% and 35%.

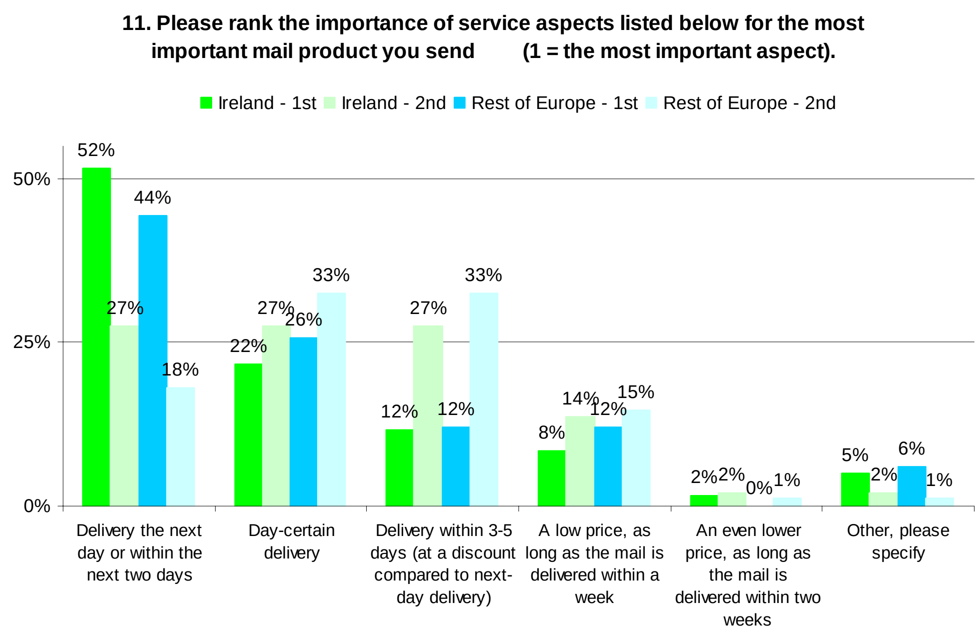


These figures are very different from those reported by IMS Millward Brown this year (67% satisfied or very satisfied) and only 4 per cent dissatisfied. The result obtained by Special Eurobarometer 219 of October 2005 showed a similar trend with 77 percent of people questioned stated they were satisfied with postal services provided to them, whereas 16 percent stated their dissatisfaction. This probably reflects the focus of the current study on large scale users of An Post's services rather than on businesses generally or private individuals.

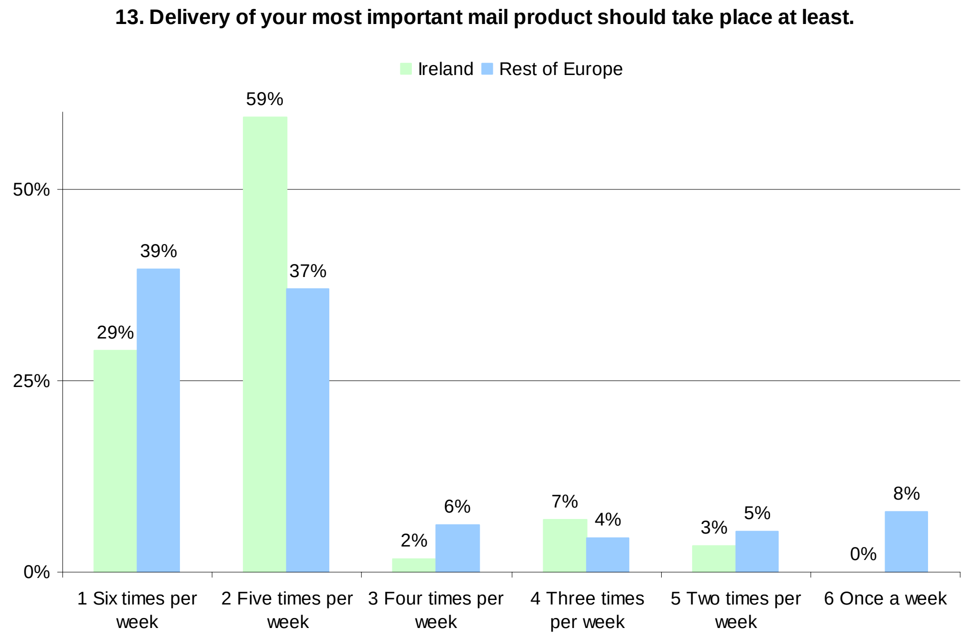
Quality is the dominant / most important issue for 78% of Irish respondents, compared to 57% of respondents elsewhere. Pricing, also, is a key issue for over 60% of all respondents – Irish and other Europeans.



Next Day delivery is important to Irish respondents with 52% ranking it as the most important service aspect

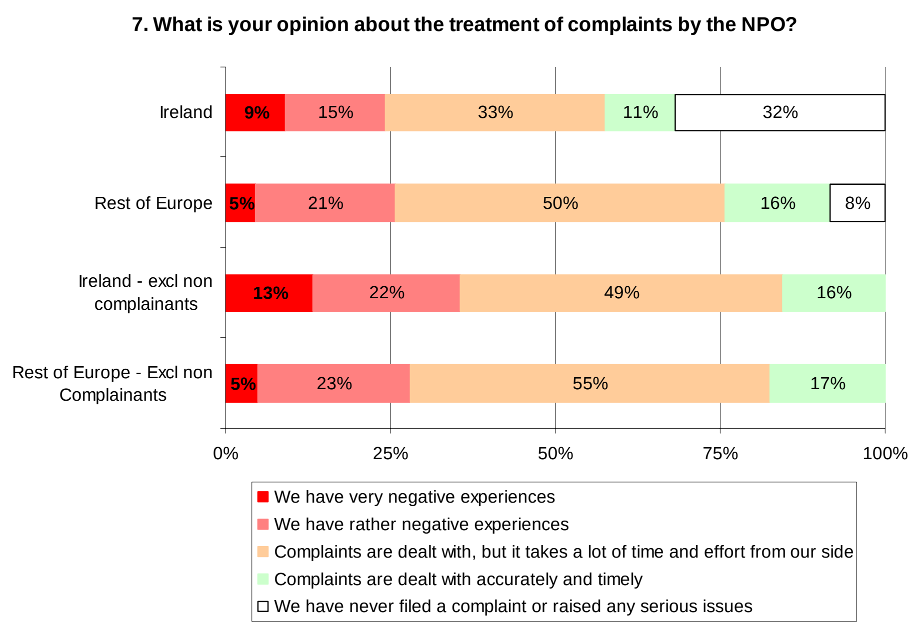


Also 88% of Irish respondents require delivery 5 or 6 days a wee, compared with 76% elsewhere in Europe.



Complaint handling is a significant issue with 35% of Irish respondents (28% of European respondents) having "negative experiences" and 49% (55% rest of Europe) claiming "it takes a lot of time and effort from our side". By contrast IMS Millward Brown reported 49% as being dissatisfied, and 21% satisfied (The ECORY Study showed that 16% say "complaints are dealt with accurately and timely").

An interesting aside is that 32% of Irish respondents have never filed a complaint or raised any serious issues, compared with only 8% of European respondents.

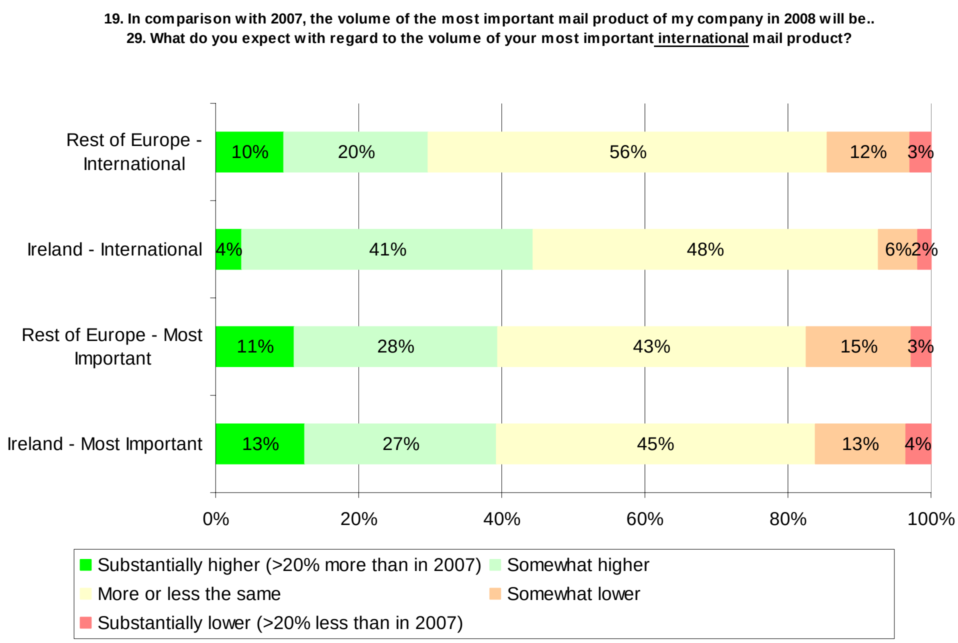


8 Future Trends

Some 50% of Irish respondents have switched from physical to electronic distribution during 2007, compared with 38% of European respondents – and 21% had switched more than 20% of the mail volume compared with 7%.

But this is not expected to impact on mail volumes with 40% of Irish respondents expecting growth during 2008 and only 20% expecting lower volumes. Indeed 13% of Irish respondents forecast growth of more than 20% in 2008. These figures are very similar to those reported by IMS Millward Brown in 2007

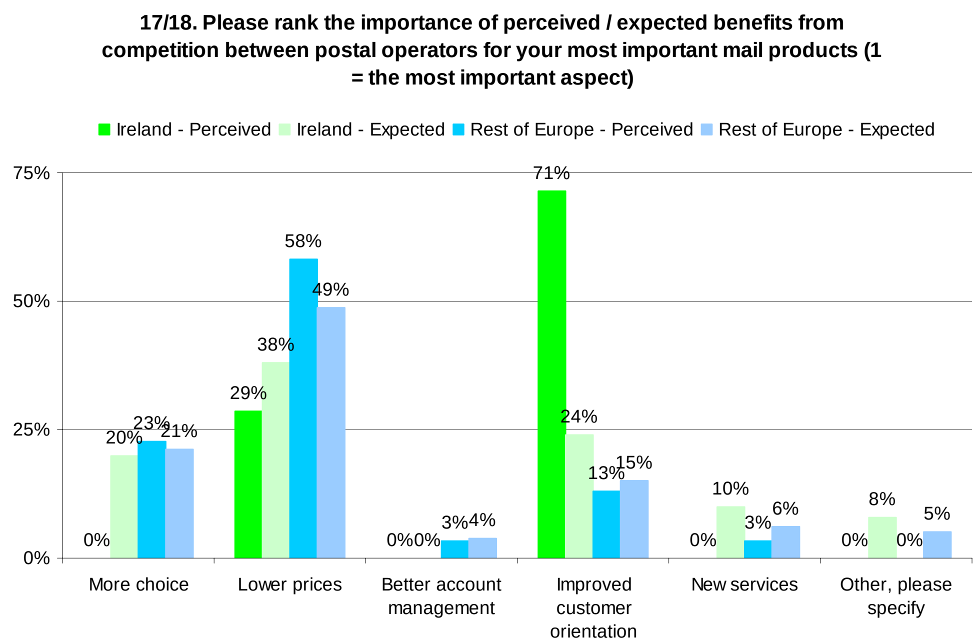
(N.B. The survey was undertaken in April / May before the full extent of the economic downturn was apparent).



9 Competition

Only 14% of Irish respondents claim to have a choice between two or more postal operators for their most important mail product (i.e. those for whom packets / parcels are the most important product) – this is significantly smaller than the rest of Europe (28%) where Direct Mail is open to competition in many countries and transactional mail is contestable in Britain, Sweden and Germany. While 75% of these Irish respondents have switched some mail to another operator (compared with 81% in the rest of Europe) a warning note for An Post is that 26% of respondents in the rest of Europe have switched "most of my mail"

Respondents were asked to rank the benefits of competition and it is interesting to compare the response of those who have experienced the benefits of competition (perceived benefits) with those who are anticipating it (expected benefits) – see graph:

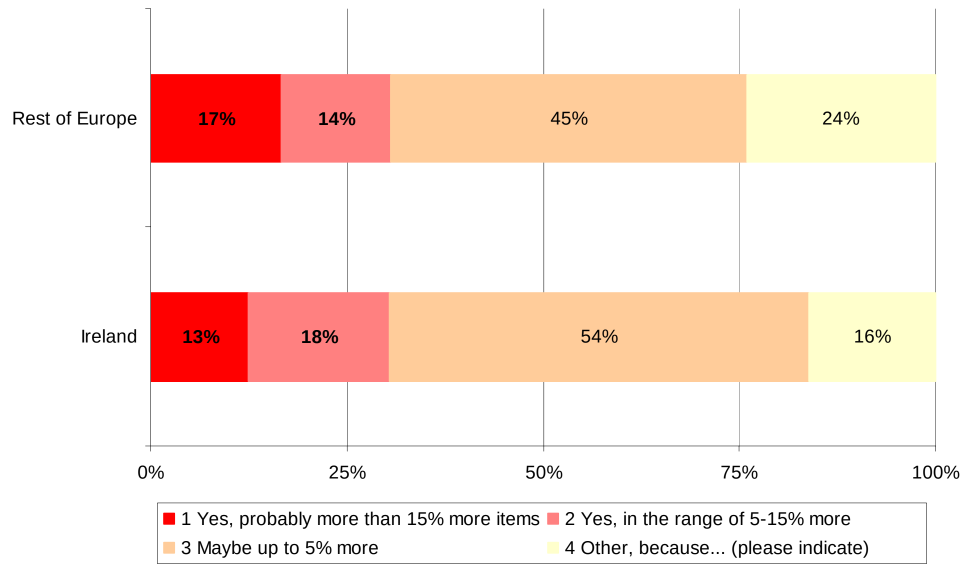


71% of Irish respondents who have a choice rank "improved customer orientation" as the most important benefit, and 29% rank "Lower Prices". In contrast in the rest of Europe, where there is competition for letter services / direct mail in many countries "Lower Prices" are ranked the most important benefit by 58% and "more choice" by 23%.

Customer expectations are more in line with the perceived benefits in the rest of Europe – with 38% Irish (49% elsewhere) expecting "lower prices", 20% (21%) expecting "more choice" and 24% (15%) expecting "Improved customer orientation"

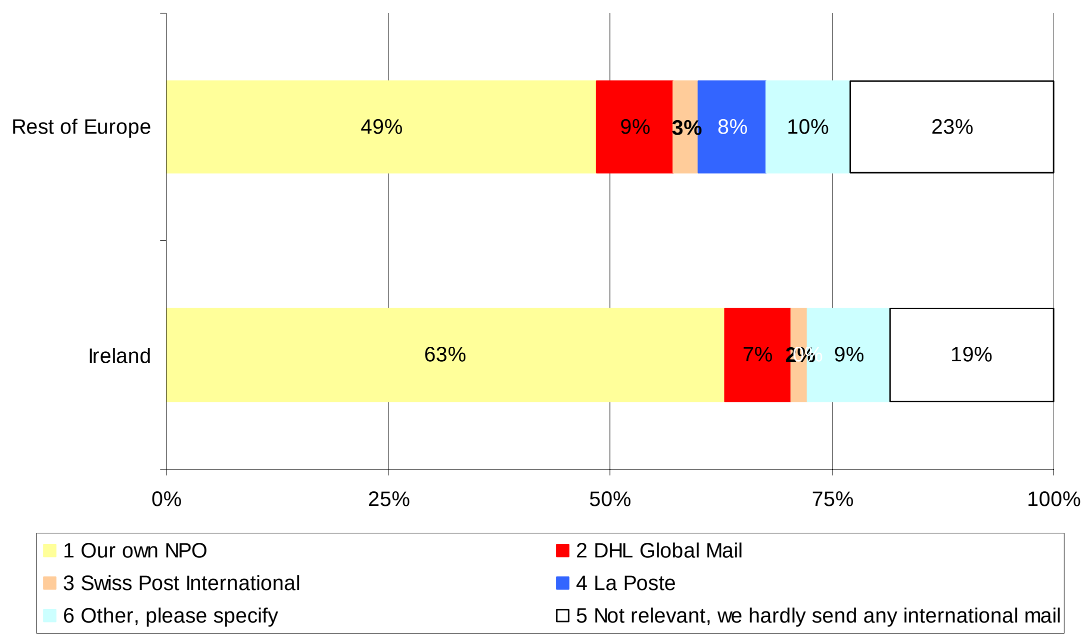
Lower prices will result in higher volumes. In response to a question on the impact of a 20% price reduction 13% of Irish respondents foresee a volume increase of 15% or more, 31% of 5% or more and 84% an increase of some size.

22. If the price per unit (per item) for your most important mail product would be 20% lower than today, would you send more items?



Even though outbound international mail has been open to competition in Ireland since January 2004 the use of alternative operators isn't as well developed as in other countries – with only 18% of respondents using an operator other than An Post (and 7% posting directly in the country of destination), compared with 30% and 14% elsewhere.

28. Whom do you use for the distribution of your most important international mail product?



10 Detailed Tables

NB The order of the questions is re-arranged to correspond to the chapter headings in this report.

	Percentage			Number		
	IRL	ROE	TOTAL	IRL	ROE	TOTAL

1. Where is your company/organisation located?

(Each respondent could choose only ONE of the following responses.)

Total responses	100%	100%	100%	99	172	271

4. How many mail items did your company / organisation (or the typical company / organisation you represent) approximately sent in 2007?

(Each respondent could choose only ONE of the following responses.)

1 More than 5 million items	16%	34%	28%	12	50	62
2 Between 1 million and 5 million items	4%	16%	12%	3	24	27
3 Between 250.000 and 1 million items	13%	10%	11%	10	15	25
4 Between 50.000 and 250.000 items	12%	14%	13%	9	21	30
5 Less than 50.000 items	55%	26%	36%	42	39	81
Total responses	100%	100%	100%	76	149	225

3. Under which heading could your organisation be classified?

(Each respondent could choose only ONE of the following responses.)

1 Financial services	5%	9%	7%	5	14	19
2 Utilities (energy, telecom, water, ...)	22%	5%	11%	20	9	29
3 Charitable organisation	3%	2%	2%	3	3	6
4 Governmental organisation	7%	7%	7%	6	11	17
5 Publisher	4%	28%	20%	4	46	50
6 Distant seller (e-business)	2%	5%	4%	2	9	11
7 Direct marketing organisation/association	3%	12%	9%	3	20	23
8 Consumer representative organisation	4%	4%	4%	4	6	10
9 Other, please specify	49%	28%	36%	45	46	91
Total responses	100%	100%	100%	92	164	256

9. Please indicate the most important mail product for your company/organisation (or the typical company/organisation that you represent).

(Each respondent could choose only ONE of the following responses.)

1 Transactional mail (e.g. bills, bank statements, invoices)	48%	18%	28%	29	22	51
2 Direct mail (addressed advertising mail)	8%	22%	17%	5	27	32
3 Catalogues		8%	5%		10	10
4 Magazines / periodicals	2%	8%	6%	1	10	11
5 Newspapers		16%	11%		20	20
6 Unaddressed mail		2%	1%		2	2
7 Letters and postcards	27%	14%	18%	16	17	33
8 Packets	5%	7%	7%	3	9	12
9 Parcels	10%	6%	7%	6	7	13
Total responses	100%	100%	100%	60	124	184

15. Do you have a choice between two or more postal operators for your domestic most important mail product (including the NPO)?

(Each respondent could choose only ONE of the following responses.)

1 Yes	14%	28%	23%	8	32	40
2 No	86%	72%	77%	50	81	131
Total responses	100%	100%	100%	58	113	171

27. What percentage of your most important mail product is international mail?

(Each respondent could choose only ONE of the following responses.)

1 More than 50%	6%	10%	8%	3	10	13
2 Between 10 and 50%	20%	9%	13%	11	9	20
3 Between 5 and 10%	7%	5%	6%	4	5	9
4 Between 2 and 5%	15%	14%	14%	8	15	23
5 Below 2%	52%	63%	59%	28	66	94
Total responses	100%	100%	100%	54	105	159

30. Which distribution channel (routing method) do you use for your most important mail product ?

(Each respondent could choose only ONE of the following responses.)

1 International mail sent through postal operator from home country	52%	49%	50%	28	51	79
2 Direct entry to postal operator in country of destination	7%	14%	12%	4	15	19
3 Not relevant, we hardly send any international mail	41%	37%	38%	22	38	60
Total responses	100%	100%	100%	54	104	158

28. Whom do you use for the distribution of your most important international mail product?

(Each respondent could choose only ONE of the following responses.)

1 Our own NPO	63%	49%	53%	34	51	85
2 DHL Global Mail	7%	9%	8%	4	9	13
3 Swiss Post International	2%	3%	3%	1	3	4
4 La Poste		8%	5%		8	8
6 Other, please specify	9%	10%	9%	5	10	15
5 Not relevant, we hardly send any international mail	19%	23%	21%	10	24	34
Total responses	100%	100%	100%	54	105	159

16. Over the last three years, have you switched any of your most important mail product to a competitor postal operator?

(Each respondent could choose only ONE of the following responses.)

1 Yes, most of my mail		26%	21%		8	8
2 Yes, a substantial part of my mail	13%	19%	18%	1	6	7
3 Yes, some of my mail	63%	35%	41%	5	11	16
4 No, please specify	25%	19%	21%	2	6	8
Total responses	100%	100%	100%	8	31	39

19. In comparison with 2007, the volume of the most important mail product of my company in 2008 will be..

(Each respondent could choose only ONE of the following responses.)

1 Substantially higher (>20% more than in 2007)	13%	11%	12%	7	12	19
2 Somewhat higher	27%	28%	28%	15	31	46
3 More or less the same	45%	43%	44%	25	47	72
4 Somewhat lower	13%	15%	14%	7	16	23
5 Substantially lower (>20% less than in 2007)	4%	3%	3%	2	3	5
Total responses	100%	100%	100%	56	109	165

29. What do you expect with regard to the volume of your most important international mail product?

(Each respondent could choose only ONE of the following responses.)

1 It will grow substantially	4%	10%	8%	2	10	12
2 It will show some growth	41%	20%	27%	22	21	43
3 It will stay the same	48%	56%	53%	26	58	84
4 It will go down somewhat	6%	12%	9%	3	12	15
5 It will go down substantially	2%	3%	3%	1	3	4
Total responses	100%	100%	100%	54	104	158

21. Did you switch from physical to electronic distribution for your most important mail product in 2007?

(Each respondent could choose only ONE of the following responses.)

1 Yes, more than 20% of the mail volume	21%	7%	12%	12	8	20
2 Yes, 10-20% of the mail volume	7%	6%	6%	4	6	10
3 Yes, 5-10% of the mail volume	7%	7%	7%	4	8	12
4 Yes, 0-5% of the mail volume	14%	17%	16%	8	19	27
5 No	50%	62%	58%	28	68	96
Total responses	100%	100%	100%	56	109	165

22. If the price per unit (per item) for your most important mail product would be 20% lower than today, would you send more items?

(Each respondent could choose only ONE of the following responses.)

1 Yes, probably more than 15% more items	13%	17%	15%	7	18	25
2 Yes, in the range of 5-15% more	18%	14%	15%	10	15	25
3 Maybe up to 5% more	54%	45%	48%	30	49	79
4 Other, because... (please indicate)	16%	24%	21%	9	26	35
Total responses	100%	100%	100%	56	108	164

The following series of questions refer to direct mail which is the most important mail product sent by your organisation (your answer to question 9).

10. Do you expect changes in the type of mailings that you send out?

(Each respondent could choose only ONE of the following responses.)

1 No, I will continue with targeted mass mailings		28%	23%		7	7
2 No, I will continue with the current mix of (untargeted) mass mailings and smaller, targeted mailings	20%	8%	10%	1	2	3
3 Yes, I expect more targeted mass mailings	40%	40%	40%	2	10	12
4 Yes, I expect more (untargeted) mass mailings and less smaller, targeted, mailings	20%	4%	7%	1	1	2
5 Yes, I expect less (untargeted) mass mailings and more smaller, targeted, mailings	20%	20%	20%	1	5	6
Total responses	100%	100%	100%	5	25	30

23. Where do you print your most important mail product ?

(Each respondent could choose only ONE of the following responses.)

1 In-house, printing is centralised	50%	34%	40%	28	35	63
2 In-house, printing is decentralised	14%	17%	16%	8	18	26
3 Outsourced to printing facility	32%	38%	36%	18	39	57
4 Outsourced to mailing house	4%	11%	8%	2	11	13
Total responses	100%	100%	100%	56	103	159

24. What kind of (external) services do you use for your most important mail product?(several answers are possible)

(Each respondent could choose MULTIPLE responses.)

1 Data processing	13%	26%	22%	7	28	35
2 Printing of mail	31%	36%	34%	17	38	55
3 Printing of envelopes	24%	40%	34%	13	42	55
4 Labelling	15%	24%	21%	8	25	33
5 Preparation for dispatch	17%	37%	30%	9	39	48
6 None – all in house	56%	35%	42%	30	37	67
Total responses	100%	100%	100%	54	106	160

25. Do you make use of consolidation services for your most important national mail product?

(Each respondent could choose only ONE of the following responses.)

1 Yes, for most of my mail	6%	27%	20%	3	29	32
2 Yes, for a substantial part of my mail	7%	8%	8%	4	9	13
3 Yes, for some of my mail	11%	12%	12%	6	13	19
4 No	76%	52%	60%	41	55	96
Total responses	100%	100%	100%	54	106	160

26. Do you make use of consolidation services for your most important international mail product?

(Each respondent could choose only ONE of the following responses.)

1 Yes, for most of my mail	6%	20%	15%	3	21	24
2 Yes, for a substantial part of my mail	2%	3%	3%	1	3	4
3 Yes, for some of my mail	9%	12%	11%	5	13	18
4 No	39%	35%	36%	21	37	58
5 No, we hardly send any international mail	44%	30%	35%	24	31	55
Total responses	100%	100%	100%	54	105	159

5. Are you satisfied with the services of the national postal operator (NPO)?

(Each respondent could choose only ONE of the following responses.)

1 Yes, very much	7%	5%	6%	5	8	13
2 Yes, reasonably satisfied	38%	35%	36%	28	51	79
3 Neutral	15%	25%	22%	11	37	48
4 No, not really	29%	26%	27%	21	38	59
5 No, not at all	11%	9%	10%	8	13	21
Total responses	100%	100%	100%	73	147	220

7. What is your opinion about the treatment of complaints by the NPO?

(Each respondent could choose only ONE of the following responses.)

1 Complaints are dealt with accurately and timely	11%	16%	14%	7	21	28
2 Complaints are dealt with, but it takes a lot of time and effort from our side	33%	50%	44%	22	66	88
3 We have rather negative experiences	15%	21%	19%	10	28	38
4 We have very negative experiences	9%	5%	6%	6	6	12
5 We have never filed a complaint or raised any serious issues	32%	8%	16%	21	11	32
Total responses	100%	100%	100%	66	132	198

Excluding respondents who have never filed a complaint or raised any serious issues

1 Complaints are dealt with accurately and timely	16%	17%	17%	7	21	28
2 Complaints are dealt with, but it takes a lot of time and effort from our side	49%	55%	53%	22	66	88
3 We have rather negative experiences	22%	23%	23%	10	28	38
4 We have very negative experiences	13%	5%	7%	6	6	12
Total responses	100%	100%	100%	45	121	166

6. What are the dominant / most frequent issues in your relation to the NPO? (Please indicate the two most important issues)

(Each respondent could choose MULTIPLE responses.)

1 Pricing	61%	63%	63%	41	86	127
2 Quality (wrong or late delivery, handling of return mail, collection, etc)	78%	57%	64%	52	78	130
3 Billing problems	4%	9%	7%	3	12	15
4 Lack of education of sales people	3%	6%	5%	2	8	10
5 Inadequate requirements for mail	7%	8%	8%	5	11	16
6 Necessity / requirements to get access to the NPO network	6%	3%	4%	4	4	8
7 Lack of attention for our specific wishes	13%	23%	20%	9	31	40
8 Recipient Customer Complaints	10%	15%	13%	7	20	27
9 Other, please specify	10%	8%	9%	7	11	18
Total responses	100%	100%	100%	67	136	203

11. Please rank the importance of service aspects listed below for the most important mail product you send (1 = the most important aspect).
(Each respondent could assign numeric rankings to the response choices. Respondents were prohibited from assigning the same ranking more than once.)

Rang 1

Delivery the next day or within the next two days	52%	44%	47%	31	52	83
Day-certain delivery	22%	26%	24%	13	30	43
Delivery within 3-5 days (at a discount compared to next-day delivery)	12%	12%	12%	7	14	21
A low price, as long as the mail is delivered within a week	8%	12%	11%	5	14	19
An even lower price, as long as the mail is delivered within two weeks	2%		1%	1		1
Other, please specify	5%	6%	6%	3	7	10
Total responses	100%	100%	100%	60	117	177

Rang 2

Delivery the next day or within the next two days	27%	18%	21%	14	16	30
Day-certain delivery	27%	33%	31%	14	29	43
Delivery within 3-5 days (at a discount compared to next-day delivery)	27%	33%	31%	14	29	43
A low price, as long as the mail is delivered within a week	14%	15%	14%	7	13	20
An even lower price, as long as the mail is delivered within two weeks	2%	1%	1%	1	1	2
Other, please specify	2%	1%	1%	1	1	2
Total responses	100%	100%	100%	51	89	140

Rang 3

Delivery the next day or within the next two days	5%	8%	7%	2	6	8
Day-certain delivery	23%	16%	18%	10	12	22
Delivery within 3-5 days (at a discount compared to next-day delivery)	50%	42%	45%	22	32	54
A low price, as long as the mail is delivered within a week	18%	18%	18%	8	14	22
An even lower price, as long as the mail is delivered within two weeks	5%	14%	11%	2	11	13
Other, please specify		1%	1%		1	1
Total responses	100%	100%	100%	44	76	120

Rang 4

Delivery the next day or within the next two days	11%	11%	11%	4	8	12
Day-certain delivery	13%	15%	15%	5	11	16
Delivery within 3-5 days (at a discount compared to next-day delivery)	5%	8%	7%	2	6	8
A low price, as long as the mail is delivered within a week	55%	54%	55%	21	39	60
An even lower price, as long as the mail is delivered within two weeks	13%	10%	11%	5	7	12
Other, please specify	3%	1%	2%	1	1	2
Total responses	100%	100%	100%	38	72	110

Rang 5

Delivery the next day or within the next two days	3%	13%	10%	1	9	10
Day-certain delivery	11%	10%	11%	4	7	11
Delivery within 3-5 days (at a discount compared to next-day delivery)	3%	1%	2%	1	1	2
A low price, as long as the mail is delivered within a week	3%	1%	2%	1	1	2
An even lower price, as long as the mail is delivered within two weeks	78%	74%	75%	28	50	78
Other, please specify	3%		1%	1		1
Total responses	100%	100%	100%	36	68	104

Rang 6

Delivery the next day or within the next two days	20%		7%	1		1
Day-certain delivery	20%	22%	21%	1	2	3
Delivery within 3-5 days (at a discount compared to next-day delivery)						
A low price, as long as the mail is delivered within a week						
An even lower price, as long as the mail is delivered within two weeks	40%	11%	21%	2	1	3
Other, please specify	20%	67%	50%	1	6	7
Total responses	100%	100%	100%	5	9	14

The following series of questions refer to your most important mail product (your answer to question 9).
12. Collection of the most important mail product I send should take place at least.

(Each respondent could choose only ONE of the following responses.)

1 Six times per week	28%	28%	28%	17	33	50
2 Five times per week	52%	46%	48%	31	54	85
3 Four times per week	3%	5%	5%	2	6	8
4 Three times per week	10%	6%	7%	6	7	13
5 Two times per week	7%	5%	6%	4	6	10
6 Once a week		9%	6%		11	11
Total responses	100%	100%	100%	60	117	177

13. Delivery of your most important mail product should take place at least.

(Each respondent could choose only ONE of the following responses.)

1 Six times per week	29%	39%	36%	17	45	62
2 Five times per week	59%	37%	45%	35	42	77
3 Four times per week	2%	6%	5%	1	7	8
4 Three times per week	7%	4%	5%	4	5	9
5 Two times per week	3%	5%	5%	2	6	8
6 Once a week		8%	5%		9	9
Total responses	100%	100%	100%	59	114	173

14. If your most important mail product is delivered less than five times per week, is it important that the mail is delivered on fixed days in the week (e.g. on Mondays and Thursdays)?

(Each respondent could choose only ONE of the following responses.)

1 Yes	39%	43%	42%	23	49	72
2 No	32%	29%	30%	19	33	52
3 I do not know / do not have an opinion	29%	27%	28%	17	31	48
Total responses	100%	100%	100%	59	113	172

17. Please rank the importance of perceived benefits from competition between postal operators for your most important mail productn (1 = the most important aspect).
(Each respondent could assign numeric rankings to the response choices. Respondents were prohibited from assigning the same ranking more than once.)

Rang 1

More choice		23%	18%		7	7
Lower prices	29%	58%	53%	2	18	20
Better account management		3%	3%		1	1
Improved customer orientation	71%	13%	24%	5	4	9
New services		3%	3%		1	1
Other, please specify						
Total responses	100%	100%	100%	7	31	38

Rang 2

More choice	29%	20%	22%	2	5	7
Lower prices		20%	16%		5	5
Better account management		20%	16%		5	5
Improved customer orientation	14%	12%	13%	1	3	4
New services	57%	20%	28%	4	5	9
Other, please specify		8%	6%		2	2
Total responses	100%	100%	100%	7	25	32

Rang 3

More choice		28%	22%		7	7
Lower prices	71%	8%	22%	5	2	7
Better account management		16%	13%		4	4
Improved customer orientation		8%	6%		2	2
New services	14%	40%	34%	1	10	11
Other, please specify	14%		3%	1		1
Total responses	100%	100%	100%	7	25	32

Rang 4

More choice	50%	23%	29%	3	5	8
Lower prices		5%	4%		1	1
Better account management	50%	14%	21%	3	3	6
Improved customer orientation		55%	43%		12	12
New services		5%	4%		1	1
Other, please specify						
Total responses	100%	100%	100%	6	22	28

Rang 5

More choice	20%	5%	7%	1	1	2
Lower prices		9%	7%		2	2
Better account management	40%	45%	44%	2	10	12
Improved customer orientation		14%	11%		3	3
New services	40%	27%	30%	2	6	8
Other, please specify						
Total responses	100%	100%	100%	5	22	27

Rang 6

More choice		33%	25%		1	1
Lower prices						
Better account management						
Improved customer orientation	100%		25%	1		1
New services		33%	25%		1	1
Other, please specify		33%	25%		1	1
Total responses	100%	100%	100%	1	3	4

18. Please rank the importance of expected benefits should competition between postal operators for your most important mail product become possible (1 = the most important aspect).
(Each respondent could assign numeric rankings to the response choices. Respondents were prohibited from assigning the same ranking more than once.)

Rang 1

More choice	20%	21%	21%	10	17	27
Lower prices	38%	49%	45%	19	39	58
Better account management		4%	2%		3	3
Improved customer orientation	24%	15%	18%	12	12	24
New services	10%	6%	8%	5	5	10
Other, please specify	8%	5%	6%	4	4	8
Total responses	100%	100%	100%	50	80	130

Rang 2

More choice	11%	26%	20%	5	18	23
Lower prices	31%	22%	26%	14	15	29
Better account management	16%	3%	8%	7	2	9
Improved customer orientation	24%	35%	31%	11	24	35
New services	18%	12%	14%	8	8	16
Other, please specify		1%	1%		1	1
Total responses	100%	100%	100%	45	68	113

Rang 3

More choice	28%	24%	25%	11	15	26
Lower prices	8%	17%	14%	3	11	14
Better account management	18%	13%	15%	7	8	15
Improved customer orientation	30%	25%	27%	12	16	28
New services	18%	19%	18%	7	12	19
Other, please specify		2%	1%		1	1
Total responses	100%	100%	100%	40	63	103

Rang 4

More choice	17%	14%	15%	6	8	14
Lower prices	9%	7%	8%	3	4	7
Better account management	29%	38%	34%	10	22	32
Improved customer orientation	23%	16%	18%	8	9	17
New services	23%	26%	25%	8	15	23
Other, please specify						
Total responses	100%	100%	100%	35	58	93

Rang 5

More choice	29%	13%	18%	9	7	16
Lower prices	10%	4%	6%	3	2	5
Better account management	26%	38%	33%	8	21	29
Improved customer orientation	3%	9%	7%	1	5	6
New services	32%	38%	36%	10	21	31
Other, please specify						
Total responses	100%	100%	100%	31	56	87

Rang 6

More choice						
Lower prices						
Better account management		50%	33%		3	3
Improved customer orientation						
New services	67%		22%	2		2
Other, please specify	33%	50%	44%	1	3	4
Total responses	100%	100%	100%	3	6	9