

1. Introduction

The Danish population is sending fewer letters – a decrease in the amount of sent letters that is once again larger than expected.¹ When the recent political agreement on postal service was concluded in June 2013, the starting point was that the amount of sent letters had decreased more than expected in 2010 when the previous postal act was adopted. Already in the first quarter of 2014, the amount of sent letters has once again decreased. The amount of letters sent has decreased more radically than what was the starting point of the political agreement less than a year earlier². This results in a range of challenges regarding how to secure a decent and at the same time economically sustainable postal service in Denmark.

For these reasons, the Ministry of Transport has requested an analysis of the Danish population's use of postal services and the need for these. The purpose is to provide knowledge on the Danish population's use of postal services including which type of postal services the population use, the frequency of these, for what purposes and what kind of needs they have regarding postal services. The analysis should provide the knowledge to make it possible to identify in what degree the need for postal services reflects the requirements the Postal Service Act's demands (which in fact is the requirements Post Danmark must live up to). The analysis includes the Danish population in a broad sense since both citizens and companies (private and public) are included in the analysis and the study behind it.

2. Conclusion – The actual use of postal services

The communication habits of the Danish population have changed – this applies both to citizens and companies. The tendency points towards an increasing digitalization – not only related to formal communication as for example contact with public institutions, it also applies to private communication and correspondence.

The report overall concludes that both companies and citizens scantily use the postal services and that the group of people, who often sends letters, also has access to the internet. Most subjects – both among citizens and companies – use different types of digital media to all types of communication. Thus, the conclusion is in line with the general political focus in Denmark.

This analysis however shows a continuing need for the capacity to distribute heavier freight sent as letters that cannot be sent digitally. This reflects on the opening of 150 postal offices in supermarkets and on gas stations, which will make it easier for citizens to collect the heavier and more physical freight sent as letters³.

¹ postloven (nr. 1536 af 21. december 2010).

² <http://www.trm.dk/da/nyheder/2014/danskerne+sender+faerre+breve+og+mailer+mere/>

³ <http://finans.tv2.dk/nyheder/article.php/id-73961899:post-danmark-%C3%A5bner-150-nye-posthuse-landet-over.html>

2.1 Summary

The following section sums up the results from the survey respectively among citizens and companies.

Conclusion – The survey among citizens

Based on the study among the Danish citizens we can conclude that the actual use of postal services is limited and that there is a great difference between the citizens' intentions and actual behavior regarding their use of postal services.

The amount of letters that has been sent in the 3rd quarter of 2014 has decreased by 10 % since the 3rd quarter of 2013.⁴ This study indicates that the total amount of letters will continue to decrease, since Danes under the age of 65 use postal services less frequently, and the tendency also shows that citizens above the age of 65 increasingly use digital communication. This is a fundamental development in the citizens' communication habits that applies to all age groups. Instead the differences among the age groups involve which type of digital or electronic media that is used for example e-mail, SMS or social media. The tendencies are that the younger Danes (18-34 years) more frequently use social media to communicate. The 35-49 year olds more frequently use SMS to communicate, while the 50-64 year olds more frequently send an e-mail.

Simultaneously there is a group of elderly, who still use postal services actively. However, this group consists of people, who also have access to the internet, who frequently use the internet and who communicate formally via e-mail or digital mailbox. Thus, this is not a group that only communicates by the use of postal services; it is a group that communicates in writing in a varied manner.

The study shows that the Danish citizens primarily intend to send personal greetings, such as Christmas- and birthday greetings and invitations, among the studied types of communication. These types of communication are also those that are valued as important letters, which require day-to-day delivery. These types are ranked much higher than more formal letters, when it comes to the importance of day-to-day delivery.

More than 60 % assess that the current delivery frequency, which counts 6 days a week, suits their needs. Simultaneously there is only 15 % of the population who has sent a letter within the past week. This indicates that the population emphasizes the opportunity of using postal services as important, even though they do not send letters frequently.

The study further shows that there is a significant difference between the citizens' intentions of sending personal written communication and their actual behavior. Those types of letters, people assess to send by using postal service, are not those they have actually sent by post. Furthermore there are a lot fewer people who have actually sent the different types of letters compared to the degree of which they intend to send them. Thus there is a discrepancy between people's intentions and their actual use of postal services. This relates to the wish of having the opportunity to send letters by post, in spite of the absence of realization. The opportunity to send post seems to affect the citizens' intentions to send letters, but not their actual behavior.

⁴ This does not count the blue health insurance card that has been sent out to the population this quarter.

Furthermore the study shows that the Danes to a greater extent use electronic and digital types of communications – both in relation to formal and informal written communication. This suggests that the written communication will continue to be electronic and digital to a still greater extent.

Post Danmark estimates that there will continue to be a market for heavier letters that contain physical items. This claim is supported in the survey, where fewer young Danes have sent letters and written communication by post. However, those who use the postal services send heavy letters and they emphasize the importance of day-to-day delivery in a smaller degree. Simultaneously, the younger part of the population more often sends gifts and privately sold items by post. This indicates that the future use of postal services to a greater extent will be used for sending physical items and in a smaller degree for sending written communication – personal as well as formal.

Conclusion – The survey among companies

The survey among companies overall concludes that there is an increased digitalization of the Danish companies.

The survey shows that the majority of Danish companies use e-mail or digital post when they send daily business mail, other administrative communication and information that does not require a reaction from the recipient such as payslips, annual statements etc.

However, there is a tendency towards larger companies using postal services to a greater extent when they send other administrative communication and information that does not require a reaction from the recipient. E-mail and digital post is, nonetheless, the preferred type of communication.

Daily business mail, other administrative communication and information that does not require a reaction from the recipient, such as payslips, annual statements etc., are those types of communication which most Danish companies use. However, almost two thirds of the Danish companies do not send any of these types of communication by post. Only about one out of four companies send one of the three types of communication by post, and only one out of ten companies send two or all three types of communication by post.

E-mail and digital post are the most frequently used forms of communication among Danish Companies. The joint public strategy of digitalization 2011-2015, which implies that it has become mandatory for citizens and companies to acquire a digital mailbox to be able to receive digital mail from public institutions⁵, causes that many Danish companies have become used to communicate digitally – a development we can equally observe in the population. An increased use of e-mail and digital post can for many companies contribute to a reduction of the communication costs, when they communicate to customers, suppliers, public institutions etc.

⁵ <http://www.digst.dk/Digitaliseringsstrategi/Digitaliseringsstrategiens-initiativer/Digitaliseringsklar-lovgivning/Lovgivning-om-digital-post>