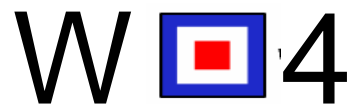


THE FUTURE OF PHILATELY

AS SEEN IN 2018



PREFACE

This paper has been prepared over two years by a small group of philatelists designated **W4**.

It represents the current view of the group

W4 (Woking, Walton, Weybridge and Waterloo) is a small Surrey-based think-tank, established in September 2012 to discuss all matters relating to Philately and Postal History. It was founded by the late Professor Derek Diamond and Gavin Fryer, and consists of approximately 10 members. Membership is by invitation. This paper has resulted from a suggestion by the late Dr. David Stotter (a former member) that the group should make a positive contribution to the world of philately. This paper represents the current view of the group.

The current membership of the Group is :-

Michael Lockton (Chairman)

David Beech MBE

Dr. Christopher Board OBE

Gavin Fryer RDP

Commodore John Keegan OBE, RN.

Bernard Lardner

John Lea

Dr. Patrick Reid

Brian Sole.

All current and former members of the group are or were Fellows or Members of the Royal Philatelic Society London.

Dedication.

This paper is dedicated to the late Professor Derek Diamond who was the inspirational leader during the founding years of W4.

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ANNEX - Summary of the “Future of Philately Summit” held at the American Philatelic Center (sic) in October 2016. It makes some good points; however, it is rather national in its coverage and concentrates heavily on commercial issues. Our intention is to broaden considerably the scope of discussion and whilst acknowledging the commercial aspects, keep these as only one element of a much larger and more complex picture.

THE FUTURE OF PHILATELY AS SEEN IN 2018

(A Discussion Paper by W4)

1, INTRODUCTION

1.1 A discussion about the future of philately raising its head again seems appropriate to us as we approach the end of the second decade of the twenty-first century. In some respects, the future has never seemed brighter; China provides but one example where there is a growing number of collectors in the Far East. On the other hand, the continuing global financial pressure, increasing use of electronic media, along with other new ways of producing revenue from postal systems provides a great challenge to the traditional philatelist.

1.2 This paper is intended to produce thoughtful reaction amongst some of our fellows gathered here and we hope that the result of drawing on such a wide body of expertise will enhance, develop and mature our thinking. We hope this will lead to a clearer way forward to take our much-loved subject into the next 25 years or so. Surely there cannot be a better occasion than Congress to present this.

We are very conscious that whilst trying to draw out the facts and attempting to reach a conclusion we have left much undone. This paper is best seen a “work in progress”

2, METHOD

2.1 We have adopted the stance that stamp collecting, including postal history and philately are directly linked being a process starting with a basic stamp.

2.2 We have tried to include all aspects of philately, as they are simply branches of the same tree¹.

2.3 We look at the facts (accepting that some facts may be negative) using SWOT² analysis in order to draw more thoughts for development leading to an early set of conclusions and recommendations to guide us through the next generation³.

3. DEFINITION

PHILATELY - SCOPE⁴

Philately is an umbrella term which includes Stamp Collecting and Postal History.

It is the collection and study of postage stamps; postage and revenue stamps; postal fiscals, postage due or to pay labels or stamps; official stamps; postal stationery revenue or fiscal stamps (including social, welfare or National Insurance stamps and stationery, etc.) telegraph stamps and stationery, telephone stamps and stationery; local carriage stamps and postal stationery; private post stamps and postal stationery. Included are the so called “Cinderella” material including advertising stamps and envelopes; poster stamps;

¹ The example given was that the French started the study of postmarks that grew into postal history (it was suggested Robson Lowe invented this name). The first specialist book was published in 1881.

² STRENGTHS, WEAKNESSES, OPPORTUNITIES and THREATS.

³ A generation is defined as **25** years and takes us almost to 2045.

⁴ First devised by David Beech 14th August 1998, revised 12th March 2017.

propaganda stamps; bogus or phantom stamps; Christmas seals; registration labels; air mail etiquettes and labels; exhibition labels; etc. and forgeries, fakes and reprints of all of the above. These may be Government, official or private in nature and may relate to countries, states, territories, places, towns areas, etc. and in any period of time. They may be adhesive or non-adhesive and international, national or local in nature and be general or restricted in application or availability. The above group to include stamps for both letter and parcel posts.

It includes the collection and study of all aspects of design and production of the above including artwork, essays, proofs, colour trials, etc. It includes the use of the various forms of stamps to show the organisation of the postal service, including rates and routes, methods of handling of mail and of the methods of transporting mail and the history thereof, and of the organisation of tax collection by means of revenue stamps, including the rates and purposes of taxation and the history thereof. It may include the social and political consequences of these services, taxes, etc.

It includes the method of production, together with the materials of stamp manufacture and the study thereof.

It includes the subject of Postal History which is the collection of entires, envelopes and covers, etc. (which may have affixed postage, postage and revenue, or postal fiscal stamps or not), in both the pre-postage stamp and the postage stamp periods, of Government and private posts, etc. And includes the study of postal rates, postal routes, methods of transporting the mail, postmarks, cancellations, manuscript marks, etc. and the organisation of such mail services or systems and the history thereof. It may include the social, economic and political consequences of mail services.

Related subjects include the history of philately as a subject and of its collector and trade organisations, promotion, development, etc.; the conservation of philatelic materials; philatelic literature; literature issued or published by organisations (official or private) who issue or produce stamps of all the above types, about these stamps or services; philatelic bibliography; philatelic librarianship; philatelic curatorship; philatelic research; philatelic writing, etc.

The related background subjects include general history, social history, political history, economic history, geography, art, design, graphics, etc.⁵

However, it is evident that Postal Authorities have a different view. In general they see philately as the range of products (stamps, miniature sheets, booklets souvenirs, covers struck with commemorative postmarkers, Year Books etc.) that they offer that will generate revenue for them in the marketplace. It is apparent that this view is held right up to the highest levels of the UPU.

⁵ The question was asked whether 'Fundamentals of Philately' by L N Williams includes a definition. It does not. It was also noted that the primary audience of the book is "The **adult** beginner", although it is hoped there will be some content of value for the more experienced collector. The title is perhaps misleading as much of the book is about printing methods..

4. DISCUSSION

In answer to a question once put to us, the group considered whether postage stamps will go the way of cigarette cards⁶.

It was agreed that stamps, if they are not produced in vast quantities, will still hold their attraction. Various factors militate against them: new ways of communicating, competition from mailing companies, new products not regarded as postage stamps, new processes of dealing with mail, lack of comprehensive listing and understanding of new ways of mailing. These also affect the study of postal history. The method and scope of distribution of stamps also distorts the market. It is relatively common nowadays for mint stamps from a particular issuing authority not to have been anywhere near the issuing country before ending up in the hands of collectors. In the UK, most Post Offices are not supplied with commemorative stamps. However, new methods of indicating that postage has been paid offer new opportunities to the enterprising collector to form collections of such material. Examples are: UK Horizon Labels; Postage Paid imprints from many countries; Post and Go type stamps and other Counter-printed stamps; Labels from other countries which serve the same purpose as Horizon labels (for example USA and Australia); Postage Labels purchased from a Postal Authority or an agent (e.g. Ebay) via the internet and printed locally; pre-printed and pre-cancelled stationery that bears a 'stamp'. There are many others.

The general conclusion is that stamp collecting as such will survive, but that there will be many opportunities to form Philatelic Collections in related fields, such as: modern pre-printed and pre-cancelled stationery; Post Office imprints; mixed discipline collections, for example family histories supported by postal history, using geographic or marcophilic aspects to enhance the story. This is enlarged upon in Section 8.

5. FACTORS AFFECTING THE FUTURE OF PHILATELY

To analyse the question "why is the future of philately in doubt?" this paper considers the current situation using the conventional business method of SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. A brief chart is shown as Appendix 4, with the headings expanded in sections below.

5.1: Strengths

- **Collectors** There is a well-established collector base worldwide, with diverse interests, and most countries have a national philatelic organisation. In some countries philately is still actively supported by the Postal Authority (or local equivalent)
- **Dealers**: There is an established network of dealers at many levels. These range from the specialist Auction Houses through internationally known dealers and full-time dealers that support major stamp fairs down to local full and part-time dealers that support local fairs. While few stamp shops remain in the UK, they still exist in mainland Europe

⁶ As an aside, a visit to a recent Postcard fair in Reading showed that the collection of Cigarette cards is far from dead. There were many dealers in Cigarette cards and they occupied all or part of 28 of the 85 stands available. On a random day, there were 139,000 cigarette cards on EBay, but 5.5 million stamps. That does not imply a dead hobby!

- International: Philately has an international scope, with an international body overseeing the competitive aspects of philately (FIP) and Continental bodies at a lower level. Most countries have an organization that (at least notionally) controls competitive aspects of philately. In the UK this is ABPS, but it has limited authority.
- Information Sources: There is a wealth of philatelic information on the internet, including online catalogues, historic exhibits and many philatelic articles. Many runs of newspapers are available online, providing background information on dates of rate changes and historic events that may affect postal services.
- Catalogues: There is a huge diversity of published catalogues that identify what is available to collect. In the UK we are familiar with the range of Gibbons catalogues, but there are many other producers with more detailed information for certain countries as well as world-wide coverage. These include: Scott, Michel and many others, as well as one-country catalogues such as Brusden-White (Australia) and Campbell Paterson (New Zealand) and specialized subject catalogues such as Murray Payne for GVI.
- Discussion forums: Internet discussion forums provide access to a whole world of expertise on almost any subject. These range from International (such as Stamp Boards) through to local Society (Such as the Tasmanian Philatelic Society)
- Material Sources: Collectible material is readily available through the internet (EBAY, Delcampe and others) and public auctions at all levels from international to local. Philatelically active countries also have a wide range of Fairs, from International, such as Prague or Sindelfingen to National, such as Stampex, down to local or regional level. Local fairs may include both Postcards and Cigarette Cards as well as Stamps and Postal History.

5.2 Weaknesses

- Ageing of Collectors: The ageing of collectors is both a weakness and a threat. The future of philately is threatened by the lack of new members joining the organized part of philately. This has resulted in a dearth of young blood coming into the collecting market; some of whom would also grow into philatelists by, for example, engaging in local stamp clubs, starting to exhibit, research, furthering the intellectual content of philately.
- Lack of Infrastructure: There is no permanent infrastructure in many towns and cities to support the new collector. The disappearance and/or closure of many clubs and societies has exacerbated this problem and it is leading to lack of sustainability.
- "Hidden" Collectors: It is known that many collect without being members of official clubs. (Example: Paul McCartney apparently collects, as do Warren Buffett, Ronnie Wood, Nicholas Sarkozy.). It is assumed that this may be true worldwide. Informal conversations with members of the Philatelic Trade (Andrew McGavin, Chris Rainey) indicates that there are probably ten times more collectors than there are those who are part of organized philately.
- Underfunding: In many countries, philately suffers from a shortage of funding. Many clubs and societies are run on a shoestring, with low annual subscriptions and tight budgets. In the UK, many annual subscriptions are in the £5 to £15 range. Compare this with clubs in Scandinavia where the subscription is around £100. In many countries where the Postal Authority has been privatized, there is no longer real active support for philately. Rather, the privatized company is only interested in selling more stamps to the 'collector', as distinct from supporting the 'philatelist'.

- Diminishing Society Membership: The membership of many local Societies has diminished substantially over the last ten years. The problem is often that members cannot be found to continue the running of the Society. Whether this is a result of too many members not appreciating that there is work involved in producing a Society Programme, or of work pressures reducing the time available for hobbies is not clear. As an example, the Harwell Society, despite having nearly 40 members, were unable to find anyone willing to fill the officer posts, and the society was wound up. Member activity to support the Society, as well as attendance at meetings, is important for sustainability.
- Shortage of new collectors: Lack of new collectors of all ages and genders⁷ – Tends to be measured by Club membership but Club membership is not the same as collectors, who may now have better things to do. There is a falling number of children collecting stamps. In the early 1990's there were estimated to be 100,000 in the UK. Kidstamps now has under 1000 members. Quote on stampactive.com website "Packs have been sent out to over 2000 children in recent years". However, the ability for adults to follow up initial interest is compromised by the need to obtain DBS clearance. It is felt that the current pressures on teachers to comply with the many and varied requirements of the National Curriculum leave little chance for teachers to engage in out-of-school activities, such as running a Stamp Club. If fewer parents are collectors, then there will be less passing-on of philately to their children; this may become a downward spiral.
- Perception of Stamp Collecting: The perception of Stamp Clubs among the public is not positive. They are viewed as boring and peopled by boring experts. This is a far cry from the sociable gatherings that most of us experience, where members are happy to welcome newcomers and share their knowledge and expertise. Philately also attracts its own share of eccentrics.
- Lack of retail outlets: There has been an almost complete disappearance of high street stamp shops in the UK. It is understood that the same is true in Germany. This makes it difficult for collectors who do not have internet access to obtain accessories such as leaves, page protectors, albums, mounts and hinges. This is true of many countries, but certainly the UK. However, the existence of stamp fairs virtually every weekend should counterbalance this. There are usually more dealers than a couple of traders in a shop. Added to this there has been a fall in the number of dealers. In the USA the number has fallen from 1000 in 1975 to 490 in 2012⁸

5.3 Opportunities

- New sources of collectors: Traditionally, much effort has been expended in trying to attract child collectors. This has led to a very small return. It is suggested that steps should be taken to attract the early retiree and recently retired, who may well have a comfortable income and a lot of time to fill. Presentations/talks to groups such as Probus, U3A, the Freemasons and Rotary may well lead to a better understanding of how Philately in the broadest sense can give 'Richness in Retirement'.
- New types of collection: The relatively recent growth of Thematic Philately and its evolution into Open Philately (and the re-classification of "Social Philately" as Postal History Class 2C) as well as the introduction of the Postcard Class widen the scope of what can be collected and displayed or exhibited.

⁷ Discussed with John Davies

⁸ Wall St. Journal <http://www.wsj.com/news/interactive/stampgraphic>

- Further expansion: The new experimental Ephemera class at Spring Stampex 2018 may provide further opportunities. It is felt that more philatelic classifications, such as: Modern Philately (Traditional, Postal History, Postal Stationery and Revenues post 1950); Subject Philately (simpler than Thematic Philately); Astrophilately (widely adopted in the USA) and First Day Covers offer greater opportunities.
- Refocus resources: The efforts to attract children to philately could be refocused to target organisations such as Scouts and Guides, though we understand that the interest is lacking, where the prospect of acquiring a badge could be used as an entry point to sow the seeds of a possible longer-term interest. Apart from the security clearance this avoids the difficulties of teachers who are under pressure already inherent in an approach to schools, but there are reports of shortages of adults to supervise such groups.
- Promotions: Active steps to promote philately and improve the image of societies could be taken by publicizing local events and fairs through local radio as well as the traditional local papers (this has been done successfully in Kent). Reports of club-related events such as Anniversary dinners should be offered to local media, together with photos.
- Synergy: Collaboration with other organisations, such as Local/Family history societies could lead to joint projects that would be enhanced by the inclusion of, for example, Postal History items and Postcards (neither of which needs to be expensive) to broaden the appeal of a story.
- Market changes: Changes in the market (see Section 7 below) have meant that there are many new types of material to study and collect. These include, for example, items relating to Postal Mechanisation in all its aspect, the rise of licensed imprints, the emergence of local post services. In particular, the emergence of a catalogue (someone has to do the work), gives an indication of what can be collected.
- Online Auctions: The rise of EBay, Delcampe and similar websites has made the purchase of a wide range of Philatelic material easy. Although there are virtually no stamps and associated materials, albums, hinges et cetera, available in high street retail shops, thus reducing the eye-catching features which started off and maintained the interest of so many young collectors, large county fairs and national events do have these. Purchase of these items online is easier than ever.
- The Internet: The increasing scope and use of the internet, both in researching material and providing a window to the philatelic world market has led to ease of buying and selling stamps from the comfort and safety of one's own home.
- Collecting fashions: Underlying all the changes in the market are changing fashions in collecting. In some cases, a collecting area will lose favour as it has been 'done to death' and leaves little opportunity for the new collector of the area to make further discoveries. Certain well-studied areas seem to be immune from this (e.g. GB Penny Blacks; Brazilian bullseyes; Cape Triangulars; Norway First Issue; Australian KGV 1d heads; Western Australia Swans; NZ Penny Universal.) However, the kudos associated with collecting classic stamps also requires deep pockets.
- New types of collector events: We understand that Scandinavia has seen the emergence of a new type of event that is a fair combined with a swapmeet, where local collectors meet to swap and /or sell their own material, possibly joined by dealers. These are publicized and promoted on the internet.⁹

⁹ Thanks to Chris King for this information.

5.4 Threats

- Perception: In the eyes of much of the public, philately has a very poor image, perhaps because it is viewed as a “trivial pursuit” rather than an intellectually challenging exercise. It is seen as being peopled by eccentric and geeky old men, who have a very narrow but deep knowledge base.
- Political infighting: The apparently secure infrastructure of world philately is currently threatened by political infighting at the highest level. There have been many reported disagreements over the competency of the judges at major international fairs, with published letters proposing a major schism between east and west (Ref: Linn’s Stamp News August 2016, Article by Kees Adema)(See also the Friends of FIP Website)
- Lack of support: In many countries the Postal Authority no longer provides active support to philately. Cynically, one might say that they are more interested in finding more ways to exploit collectors.
- Electronic communication: The rise of Email, Instagram and Snapchat has led to the volume of letter and postcard mail continuing to drop, notably personal mail, rather than ‘junk’ mail used for advertising purposes. However, the rise of online retail has seen an increase in parcel and packet mail, only some of which produces collectable material.
- Sources of material: The closure of retail shops and approval services makes the acquisition of new material difficult. The decline in the number of societies has also led to a decline in the number of circulation packets, which to some extent replaced approval services. This problem is compounded by the number of packet book suppliers who have either retired or passed away.
- Decline in mail: The lack of ‘real’ mail (actual written letters, greetings cards and postcards) (see Appendix 2) has led to great difficulty in finding modern mail with stamps correctly used close to their period of issue. This is also an opportunity for the avid collector to try to find correct usages within period. While using stamps on personal mail, the group often use stamps issued up to 40 years ago. Conversely, the volume of parcel mail is growing, but this seldom uses prepayment by postage stamps.
- Investment schemes: There are schemes that promote philatelic material as an investment. In most cases this is inappropriate, and, as has happened in the past, many will get their fingers burned, usually with negative press publicity. The recent collapse of the Gibbons scheme reinforces this problem.
- Fraud: Fraud scandals in Europe have damaged the image of philately (<http://www.tradersnarrative.com/a-sad-end-for-the-afinsa-fraud-saga-3625.html>)
- Lack of dealers: The continuing drop in the number of full-time dealers threatens the viability of local and national fairs and the supply of material. (Evidence is only circumstantial and UK only: less dealers at Stampex, less tables at local fairs.) There is, however, evidence of a rise in local auctions.
- Misrepresentation: The sale of fraudulently misrepresented items via the internet affects the image of philately. While redress may be gained through Paypal protection, or Section 75 claims (Credit Cards), the purchaser will remain disillusioned. The bywords remain “let the buyer beware”.
- Licensed mail: The huge increase of licensed mail with ‘Paid’ imprints could give rise to a new collecting area, but there is very often little variety to make an interesting (visually) display.

- Death: The threat posed by lack of new collectors has been exacerbated by the dying-off of senior and knowledgeable philatelists and associated dealers. There is nothing new in this phenomenon. However, senior and knowledgeable philatelists may have fixed views as to what is 'acceptable' in a collection, and new collectors may challenge the classic view,
- Forgery: The large trade via the Internet appears to have increased the incidences of forged stamps and cancellations reaching the unwary dealing in the market.
- Mail Centres: The concentration of cancellation, sorting and distribution in heavily mechanized Mail Centres covering a wide geographic area has led to a steep decline in the variety of Postal Markings applied to mail. This is evident in the UK, France, Germany, Australia and South Africa and no doubt many other countries.
- Lack of Dates: Most modern licensed mail has no datestamp applied. This is a fundamental deficiency when considering collecting such material as Postal History.
- International bodies: The perceived integrity of international bodies, and their apparent lack of concern at the highest level for the ongoing development of philately.

6. WHAT IS HAPPENING WITH COLLECTORS NOW?

It is clear that there are many collectors who do not participate in the social aspects of philately. The reasons may be:

- Concerns over security;
- Keeping spending secret from a partner;
- A 'quid pro quo' for not spending time away from a partner;
- A family view that collecting is 'boring'.
- The cost of insurance

However, membership of The Royal Philatelic Society London (RPSL) is increasing – but what age group and from which parts of the world? Are these new collectors or a result of better strategic planning by the RPSL? Are similar trends seen overseas? The opinion of the group is that RPSL is providing services to meet demand. These include making 5pm presentations available via the internet; access to the extensive Library catalogue, not just for RPSL, but also those of other institutions. The Global Philatelic Library may be accessed via the RPSL website.

The Royal's increase in membership is of a different order from the decline elsewhere. Many new members are now from overseas.

The ABPS only recognizes Societies that are affiliated (they support ABPS by paying a capitation fee). Other Societies exist, but they may only gain publicity via a website and local media. ABPS does list these Societies in its handbook.

Some other groups have also seen a growth in membership. The "Wreck and Crash Mail Society" has a niche and clearly tapped in to an unfulfilled demand. It also addresses an area where there are still major opportunities for further research. The Bookham Society has a large membership and has grown from small beginnings. Its pioneering (in Surrey) Selling Point was that all of its meetings are in the afternoon.

This addresses the concern of older members who do not like to drive after dark, but conversely it is less attractive to those who are still working. A side effect has been the closure of a number of nearby Societies that met in the evenings. It also includes trading tables and a regular 'Bring and Buy' auction.

7. WHAT IS HAPPENING IN THE PHILATELIC MARKET?

- Definitive stamps are fast being replaced by labels such as Horizon or the Post and Go with or without pictures. The latter are now being listed by Deering in GSM, a prerequisite for collectors who want to know what there is to collect. We can legitimately ask whether these are attractive enough to eclipse old-fashioned postage stamps. There are some signs that new postal stationery using Machin and other design 2nd class pre-cancelled bulk-mailings are collectable. So far these are hard to find and not listed. They have appeared in journals. The availability of commemorative issues is heavily restricted, and many Post Offices do not ever see them. Supplies seem to be readily available to some dealers and, of course, the Philatelic Bureau.
- There are many uncertainties that can affect markets. These include: Exchange rates; changing fashions in collecting; political upheaval (consider modern Iraq, Syria, Libya and Somalia for example.)
- The new type of licensed mail is somewhat similar to meter mail, in that "franked" items are paying a postal rate different from the public rate. At least with meter mail there is a date embodied when the mail was posted (in theory). For a large proportion of licensed mail carried by operators other than Royal Mail no date when the mail was posted is recorded on the cover. These items are normally not cancelled. They usually include a logo and statement that they are delivered by Royal Mail to anywhere in the UK. As a result, postal history is not being recorded at all.
- It has been noticed that the publication of an important reference work has an impact on the interest in a particular subject area. The publication of the Australian Postal Stationery Catalogue by Brusden-White gave a boost to Postal Stationery collecting for around 18 months and many more collectors are now aware of the rarities. A similar effect has been noticed after Huggins published his work on GB Stationery (both editions now out of print). All of this reinforces the view that collectors like guidance on what is available to collect, whether in the form of a Catalogue or a reference work. Few have the time and dedication to construct a catalogue from scratch.
- There have been policy changes in some Postal Authorities, with a monopoly being replaced by a competitive market. This has led to 'cherry picking' by some market players, who leave the labour-intensive parts of the delivery chain to the former monopoly organization.

7.1 New Postal Technology. (The move by many postal authorities away from the traditional postage stamp):

- There are more modern means of proving postage revenue has been collected. This is understandable when one considers the amount of bulk mail, junk mail and general increase in population using mail services, the growth of E-mail, MMS, SMS et cetera.

- The number of stamps issued each year continues to grow. In particular high value stamps are issued when there is no real postal need for them. However, such issues tend to be unlisted by Stanley Gibbons in catalogues unless genuine usage has been proven. See below on the WADP Code of Ethics.
- At this point it would be worthwhile stating what kinds of items (stamps, covers etc.) are changing. Royal Mail has increased the numbers of issues and is not the only postal authority to have done so. There is just too much to collect if one feels that completeness is important. More importantly, it is becoming increasingly difficult to find commemorative issues correctly used within period. Often the only used copies available have been removed from First Day Covers.
- Ordinary mail rather than event covers with new issues is rapidly disappearing.
- In the UK much of the above new-style material has resulted from the need to maintain revenue by Royal Mail. Royal Mail is under two forces which are interlinked. They are obliged to render a universal service to all parts of the UK. This is despite the competition from other carriers (often foreign postal authorities). To some extent this follows from the privatisation of Royal Mail. These are essentially political factors that are bound up with funding pensions and the cost of labour.
- Such factors have already led to concentrating sorting into larger centres serving huge areas. Loss of postal history detail results.
- These changes have been made possible by computerisation (mechanised sorting was an early step down this road.)
- As the top point in section 7.1 says, communication is achieved by many more means. Telephone and e-mail from (often) mobile devices have replaced the messages delivered by postcards. However, there seem to be signs of a backlash. A recent survey found that millennials tend to send postcards when on holiday. Conversely, email is now becoming old-fashioned, with Instagram and Snapchat (complete with picture) rising in popularity.
- Trends in business and social communication favour the use of the Internet instead of traditional postal systems. These are driven by advances in information technology. Personal inter-communication is by texting, e-mail, and other social media. These have severely reduced the use of postcards and letters. Correspondence is largely restricted to transactions that involve legal matters such as house sales, wills, contracts and similar matters. On-line banking, tax paying, shopping and charity fund raising do not now need postal services to be successful except that most shopping requires a delivery service. It is no longer necessary to live near a Postal Authority for basic mail services. If you are online, then it is now possible to buy and print postage labels at home¹⁰, provided that you open an account first. This avoids queuing for vending machines and journeys to Post Offices.

7.2: The commercial aspects: (difficult to separate entirely from 7.1).

- How has the market been affected by a relatively long recession? In general, a characteristic of a recession is that investors seek 'alternative investments'. This may have buoyed the philatelic market with money from non-collectors, but history says that it usually has a bad ending. This has just happened with the fall into administration of Stanley Gibbons (Guernsey) Limited. Is it possible that the true

¹⁰ Dec 2017 #3 UNION POSTALE p.24 David Koch Article on Lithuania.

collector will have an opportunity to take advantage of a 'fire sale' liquidation of assets.?

- Has the market peaked? How have the investment schemes in classic and rare stamps affected the true nature of philately, if at all? Historically there have been major failures, scandals and criminal prosecutions related to such schemes (see previous paragraph).
- The lack of younger blood fails to ensure a customer future to keep the "stamp market" alive. This market involves the trading of stamps, postal stationery, postal history, proofs, trials and philatelic material to name a few. But the unknown size and nature of the non-affiliated collectors may well mitigate this.
- However, Internet sales and auction sites seem to be busier than ever and appear to have a very high volume of sales of all aspects of philately. Is this the hidden resource that we may need to tap? If so how is this best done?
- Has the reach of the internet brought realism to prices? In many cases probably not. There are many items that regularly appear on EBay that are priced far too high for the current market. But they keep appearing, month after month. The canny observer will also note some highly suspect items.
- There are still 200 countries issuing stamps - 9000 new stamps are issued every year¹¹ What proportion of these are ever used for postage?
- There are new forms of stamps or labels e.g. QR codes, so the range of collectables is still increasing.
- The global value of the Philatelic Market is \$3bn. It is seen as an alternative investment. The Chinese put 17% of their wealth in Stamps and Alternatives as it is seen as a hedge against inflation, it is patriotic (collecting Chinese stamps) and they have fewer alternative investments than in the West. The US and UK put 9% and 7% in alternatives¹². There are between 25-100K stamp collectors in India. India Post has included encouraging stamp collecting in its 5-year plan¹³.
- There is concern that without catalogues (such as Stanley Gibbons, Scott, Michel, Yvert & Tellier, Australian Commonwealth Specialists', Barefoot and many others) as a collecting guide, it could be argued that it would not be possible to collect in the current way. However, a number of online catalogues have appeared (for example Australian Revenues) and some are published in computer-friendly form (CD or DVD). (Note that collecting usually involves aiming for some form of completion, even though this may be a simplified version).
- There are many other services available to the modern collector who has access to the internet. These include: online journals; newspaper archives; auction catalogues; online books and others.

¹¹ <http://www.wsj.com/news/interactive/stampgraphic> (accessed 4/12/17, no graphic found readily, see next page)

¹² See Wall St. Journal.

¹³ www.indiapost.gov.in/Pdf/Strategic_Plan.pdf (accessed 25/06/17 – no longer available)

- The SG annual accounts records 'Publishing' sales (includes catalogues/albums/magazines) as 2016 £3.0m; 2005 £2.8m; 2000 £2.55m. This division is profitable and could survive even if sold to a third party.
- Research has shown that the WADP publishes a Code of Ethics for UPU countries, that includes a requirement to issue only stamps that "are needed for commercial reasons". (Webpage now username/password protected)
- The UPU Istanbul Meeting in October 2016 agreed the following strategy statement: "To be seen as an enabler of inclusive development and an essential component of the global economy"¹⁴,

8.CONCLUSIONS:

- Philately cannot surely limit itself to postage stamps and postal stationery and the history of their use, but must, in order to survive, also embrace the mundane. Although there is mechanised sorting and cancelling is done in increasingly fewer mail centres, the delivery of mail is still done by human beings. Hence annotations and instructions which adorn some covers will still be of interest. It needs a museum dedicated to telling the story of postal services to ensure that knowledge about modern changes is preserved (does the British Postal Museum fulfil this function?). Then as far as possible collectors of both traditional and new kinds of material will be able to benefit. If no one documents such material, we fear that exceptional collectors not following traditional directions will be "a voice crying in the wilderness". Collectors will have to face listing what they find and passing on their knowledge. Philately follows the Post or the Mail. Philately starts with collecting and reaches its acme in understanding.
- Is philately really in decline? We do not know and are brave enough to say so. We ask our audience to tell us. Is the nature of many stamp collectors changing, in that they are becoming more introspective, and missing out on the social and collaborative benefits of membership of an organized Society? If so what steps might be possible to reverse this trend? Do we need to reverse it, or is it just the evolution of collecting fashions? Remember when Postal History was not fashionable? And Revenue collecting derided?
- New stamp-like postal stationery is now being used by companies. Most have a second-class Machin franking, but pictorials have been seen. This stationery is allied with an imprint identifying the contract, typically for a charity. We understand that the rules for introduction of such stationery are laid out on the Royal Mail website. This material seems to be more appealing to the collector. See Journal of the Postal Stationery Society which has recorded its appearance.
- Could we interest younger philatelists to collect items which have come through the post, but which are not adorned with distinctive postage stamps? Where are we there

¹⁴ www.upu.int/uploads/tx_sbdownloader/postalEconomicOutlook2018En.pdf accessed 3/4/18

- supplies, lists, explanations, summer's junk mail, some bulk mail. Rarity may provide an attractive span for collecting.

- Are there sufficient activities available to instruct newcomers in the essentials of philately, and enable them to learn how to develop a collection? Are collectors, for example, encouraged to document ANY new discovery, so that the knowledge of it is not lost to posterity. How can new collectors find out about journals that are available? Are they taught that Auction Catalogues can often be an ideal adjunct to a reference book on a subject?

9. RECOMMENDATIONS:

- We need to establish the response of governing bodies such as FIP, FEPA, FIAP, FIAF, PTS, ASDA, APS, ABPS (see Glossary for expansions) to changes in philately, and whether they are taking any action to develop philately and secure its long-term future. It appears that there is no such activity within FIP, but, conversely, some National Governments are taking an interest (China, India and Nigeria). ABPS continues to support youth activities, but the results are disappointing, and, based on competition outcomes, the UK is far behind organisations in mainland Europe in attracting and developing young philatelists. However we are pleased to note that the Royal Philatelic Society London decided to set up a 'Youth Programme' for Young Philatelists from all over the world during Autumn Stampex 2018. Young philatelists with high potential (aged between 18 and 35 years) were invited to London to visit the RPSL, the British Library, the Postal Museum London, Stampex itself and to attend the President's dinner. In the USA a mentoring scheme has been started to help to develop the next generation, but it is too early to assess whether or not it has been successful
- A wider awareness should be encouraged to explore what is available from the UPU. It sets the International framework for Postal Systems, and it has responsibility concerning philately and its development. The responsible body in the UPU is the World Association for the Development of Philately (WADP). The World Numbering System (WNS) was created and developed by WADP to combat illegal stamp issues. It serves as a data base for all authentic issues, but also as a directory for philatelists keen on accessing thousands of unique stamps. It plans workshops 'to modernise the philatelic industry at large'. Union Postale is the journal of the UPU, and it provides articles on a wide range of subjects relating to the organization and running of Postal Systems. However, there is a fundamental disconnect between what WADP and Postal Authorities understand by 'philately'¹⁵ and the definition at the start of this paper. Perhaps the philatelic community should consider beginning to build bridges with the Postal Authorities by modernizing some of the collecting interests that we promote. In the exhibiting world this could be reflected by the more widespread adoption of classes such as "Modern Philately", "First Day Covers" and "Subject Philately". We believe It is more likely to encourage different collectors to enter competitions, even if only at Federation level in the first instance.
- Travelling around Societies to do presentation and judge competitions, it is apparent that few Society members are aware of the extensive resources available via the

¹⁵ To them, Philately means the products and materials that they produce for sale to consumers.

ABPS website. Better publicity needs to be given to this aspect of ABPS activities. We suggest an enterprise led by ABPS on the internet to provide basic information on philately to allow potential collectors to have a check list of what to collect. This could draw on specialist societies via their websites to list their basic collecting information such as: a) cancels (Postal Authorities) b) postage letter rates c) record online established thematic collections as guides. Such websites could also provide a guide to the reference books available on both general and specialist topics. This will raise problems of updating. Who are the gate-keepers? Is there sufficient interest?

- We need to decide how much effort should go into promoting Exhibiting/Exhibitions and competitive philately. It is estimated that, at International level, there are no more than 2,500 participants in exhibiting, and this activity consumes a great deal of resource. It is easy for a beginner to visit an exhibition and be discouraged by the depth and quality of material on show and see it as unattainable. Can we find a way to promote more variety and larger numbers taking part? The introduction at Stampex of the opportunity for sponsoring Societies to display non-competitive material has undoubtedly increased the amount and variety of material displayed. But has it brought interest from a wider audience who would think: "I could do something like that"? Would we get more entries if we allowed new classes such as: Modern Philately (post 1950); Subject Philately, or would we get different entries from the same philatelists? Should we promote Postal History Class 2C (formerly Social Philately) more widely. It should appeal to a wider audience as it allows the inclusion of a range of material, some of which can be visually attractive? Alternatively, perhaps we should allow more non-competitive displays, as the activity of preparing and displaying material, allowing others to share in your 'Pride and Joy' is both therapeutic and satisfying.
- Media and PR. Organised Philately should be better at communicating with the media. In the UK unless there is financial interest (The \$10m stamp) philately perhaps is seen as slightly odd and strange. How do we best advertise (the benefits)? Should this be led by collectors or the commercial side? The falling circulation of stamp periodicals (such as Gibbons Stamp Monthly, Stamp Magazine and Stamp and Coin Mart) reduces the opportunity for new collectors to find out what is going on, unless they make a conscious effort to go to a shop and buy a copy (if there is one on display)? However, the recent explosion of social media is proving a resource that is being widely used. Stampboards, run and moderated from Australia, provides an internationally accessed forum for raising queries, getting them answered and airing and resolution of philatelic arguments. The Tasmanian Philatelic Society use their Bulletin Board as a means of providing access to reference information and extending the knowledge base. We are sure there are many others. Utube could easily be the medium for dissemination of seminar material on the basics of writing up, displaying and exhibiting.
- Catalogues: We consider catalogues to be fundamental to the development of a collecting field, but some are a mixed blessing. The cost is substantial and rising with inflation, but they are the basic guide to what is available to collect. They can also be a medium to exploit the unwary. To give but one example, there is a set of four German stamps that were produced as normal stamps and in a miniature sheet (MS). The MS version is much more highly priced. However, the SG Simplified catalogue

lists the MS stamp rather than the regular stamp. The beginner would find the stamp and think they had something catalogued over £150, when in fact it is catalogued at about £2.50! The natural medium for catalogues is probably the internet¹⁶, as it can allow searching on multiple criteria (date, watermark, colour, perforation), but display on the screen has been shown to lead to less retention of information. The other advantage of using the internet is that it allows a group to collaborate to develop a catalogue for a new collection type or area with investment only of their own time and effort. They can decide when they think it is ready for wider publication. Perhaps it is time for the introduction of a subscription service that provides updates at a reasonable cost, both of content and pricing. This would ensure that errors could be readily corrected and the huge outlay on printed catalogues could be largely eliminated. As most catalogues are prepared for printing in computer form, this would seem to be a relatively simple innovation¹⁷. A conversation with a representative of Stanley Gibbons has revealed that this innovation was about to happen, but the owners of the software to be used 'pulled the plug' at the last minute, and the project is now on indefinite hold.

- There are many publications by philatelists (guides, books, journals, magazines).. Guidance and advice is needed on philatelic writing, and the styles to adopt to reach the correct target audience. There are various avenues available for printing and publishing of philatelic works. These include: Society Journals (both specialist and such as the LP), The Rossiter Trust; Society sponsorship of a monograph or book (including by the RPSL Publications Committee); private publishing.
- If we are serious about promoting philately to the older collector, then we should also explore collaboration and course development with the University of the Third Age (U3A) as well as organisations such as Probus and Rotary.
- A full-time and paid development officer is needed for philately. It is recommended that such a person be tasked with developing links with U3A, Probus and Rotary, and be supported actively by ABPS, who could source local speakers to address meetings aimed at stimulating interest in philately.

¹⁶ See, for example the Australian Revenue and Railway Stamps catalogue online at www.ozrevenues.com

¹⁷ An early example of this is the updated "T for Tax" by Colin Salt and Richard Peck., published on CD in 2009

GLOSSARY of acronyms used in the text

ABPS	Association of British Philatelic Societies
APS	American Philatelic Society
ASDA	American Stamp Dealers Association
DBS	Disclosure and Barring Service
FEPA	Federation of European Philatelic Associations
FIAF	Federation Internationale de Philatelie Africaine
FIAP	Federation Internationale de Philatelie Asiane
FIP	Federation Internationale de Philatelie
GSM	Gibbins Stamp Monthly
MMS	Multimedia Messaging Service
PTS	Philatelic Traders Society
QR Code	Quick Response Code
SMS	Short Message Service
U3A	University of the Third Age
UPU	Universal Postal Union
WADP	World Association for the Development of Philately

APPENDIX 1 UPU Postal Statistics

References are to Philatelic Revenue mostly between 2010 and 2015.

Several tables have been downloaded from the annual volume, which avoided transcription errors and was much more comfortable than examining the hard copies in the LSE library.

Table 6.5 Income from philately as a percentage of total income in the hard-copy version is available only in each country's table in Part 1. A country-by-country tabulation is available only from the web site. One can obtain data for the last five years. I was also able to download a table for another year which I specified. Unfortunately many of the European and larger administrations appear not to have returned data on philatelic income, among them GB, France, Germany, Netherlands, Norway, Estonia, Lithuania, Singapore, Hong Kong China, Pakistan and India. It has been suggested that the reason may lie in issues of commercial confidentiality.

There are several drawbacks in the data. There are many blanks, when nothing was submitted to UPU. NA for Switzerland (not available) no data seems to have been reported, but was not ready in time. This there are gaps in the record 2011 to 2015, which hinders any assessment of trends.

In the case of table 6.5, it is clear that some countries have simply guessed at the percentages as they are rounded up or are the same for several years.

A second Table (5.1) Operating Revenue in SDR (Standard Drawing Rights) an international measure used by the IMF gives one an idea of the volume of the postal business as reported by each administration. It is thus possible to calculate the volume of philatelic income in SDRs were this required. (239 billion SDR = 330 billion US\$.) Under Great Britain it notes that the figures exclude activities of Royal Mail GLS

Adding in data from paper copy volumes we see that for USA percentages are in 2006 at 0.07 up to 2011, moving up to 0.37 in 2012, thereafter ND. Figures for Italy from 2006 to 2014 range between 1.40 and 2.40 peaking in 2009. For Mexico the figures start at 1.20, peak at 2.76 in 2011, drop to 2.41 in 2012, but fall to insignificance in 2013 and 2014. For Australia we have four years of data from 2006 to 2009 varying between 1.51 and 1.60. Fortunately for China (PR) there are what appear to be good records: a declining percentage from 2010-2015 - 3.40, 3.38, 3.00, 2.70, 2.80. 1.54 but against total revenue from 2012 of 33, 30, 46, 50 billion SDRs.

In general, the higher the revenue the lower the percentage comes from philately, but there are some obvious exceptions. Taking those countries returning 5 percent or more from philately, we note Afghanistan, Angola, Bhutan, Bulgaria, Equatorial Guinea, Faroe Is, French Polynesia, Greenland, Iceland, Iraq, Lichtenstein, New Caledonia, Paraguay, St Kitts, Sierra Leone, Tanzania. Perhaps the more surprising ones here are Bulgaria and Lichtenstein.

CB 1.5.17

APPENDIX 2

Examples of postal statistics from UPU

Year % Revenue Philatelic Total working revenue (thousand SDR)

Huge volume of mail

China, P.R.

2012	3.00	33,241,957
2013	2.70	35,576,183
2014	1.80	45,658,879
2015	1.54	49,586,876

USA

2011	0.07	42,808,469
2012	0.32	42,243,526

Medium volume

Poland

2011	0.60	1,152,242
2012	0.70	1,248,785
2013		
2014	0.70	1,096,328
2015	0.80	981,836

Small volume

Uruguay

2011	0.60	15,588
2012	0.45	25,802
2013	0.40	28,018
2014	0.50	28,425

Macao, China

2011	51.23	16,689
2012	35.13	13,160
2013	33.33	14,232
2014	49.71	20,906
2015	77.18	46,038

Very small volume

Bermuda

2011	2.40	3,465
2012	3.30	3,417
2013	2.80	2,913
2014	4.60	2,881
2015	3.80	3,192

French Polynesia has volumes similar to Uruguay, but routinely reports % philatelic above 2%. Tonga and St Kitts/Nevis have tiny total revenues and report wildly variable percentages philatelic revenue, each in three out of four years amounting to at least 9%.

APPENDIX 3 FIP

The FIP was founded on 18 June 1926 and is the world federation for philately.

The FIP has 95 member Federations currently. Three new members, Macedonia, Oman and Sri Lanka were admitted at the 74th FIP Congress held in Chinese Taipei on 26 October 2016. Each Federation pays an annual fee with a special reduction of 200CHF if meeting specific conditions.

There are 3 Continental Federations; each Federation Member belongs to one of the Continental Groups.

FEPA Federation of European Philatelic Associations

FIAF Inter-American Philatelic Federation

FIAP Federation of Inter-Asian Philately

The President of FIP is Tay Peng Hian, Singapore who completes 2nd & last term end 2018.

The Board of FIP is made up by

3 Vice-Presidents: Bernie Beston, FIAP; Bernard Jimenez, FEPA; Reinaldo Macedo, FIAF.

3 Directors: Yigal Nathaniel, FEPA; Prakob Chirakiti, FIAP; Aldo Samamé, FIAF and Secretary-General: Andrée Trommer-Schiltz Switzerland

There are 11 FIP Commissions each with a Bureau consisting of a Chairman and Secretary plus nominated individuals.

Every Member Federation has the right to nominate a delegate to each of the Commissions –

- Aerophilately
- Fight Against Forgeries
- Literature
- Maximaphily
- Postal History
- Postal Stationery
- Revenues
- Thematic Philately
- Traditional Philately
- Youth Philately
- Astrophilately

The only GB appointments are

Michael Smith, Bureau member of the Postal Stationery Commission.

Bill Hedley, Bureau member of the Postal History Commission.

Birthe King is a Director of FEPA, the European Commission

The FIP publishes General Regulations for Exhibitions (GREX) and General and Special Regulations for the Evaluation of Exhibits at FIP Exhibitions (GREVS and SREVS) plus Guidelines for each Class. See attachment PDF “FIP Commission and Associated Websites”, by clicking on the words underlined, full details can be obtained.

The ABPS Exhibitions and International Committee, Chairman Bill Hedley, has delegated responsibility for all aspects of competitive exhibiting in the United Kingdom and Overseas.

At International level, the committee is responsible for appointing Commissioners, setting frame fees/handling charges, nominating jurors and apprentice judges for FEPA and FIP Exhibitions

Both Commissioners and Judges have to be approved by FIP and are granted special privileges. At October 2017, a UK Commissioner had to submit a minimum number of 18 applications for General Exhibition (All Classes) and 10 applications for a Special Exhibition (a limited number of Classes) to obtain the privileges.

The aims of the FIP were reaffirmed at the 74th Congress held in Chinese Taipei 26.10.2016 by a motion submitted by FEPA and passed with 46 votes in favour

- To promote philately and stamp collecting, in all its aspects, on the international level.

- To create friendly relations and to maintain close co-operation among philatelists and stamp collectors throughout the world, with the aim of promoting peace and friendship among all people.
- To promulgate regulations governing its various activities
- To establish and maintain close contacts with - partners in the philatelic field and with national and international organisations. (Previously with philatelic trade and postal administrations)
- To support philatelic events of all kinds organised by its members. (Previously, to promote philatelic exhibitions by granting Patronage and Auspices.)

The purpose of the motion was submitted by ABPS and presented to Congress by Chris King under the heading “The Future of FIP”. The purpose of the motion was, briefly

- To instruct the Board to consider and report back on how to recreate the link between the Continental Federations and the FIP Board
- To incorporate formally and to value the national and continental federations and the specialist commissions.
- To create a clear sense of direction for the FIP over time.
- To improve communication and the availability of information of information to all involved in supporting the FIP.
- To support affordable exhibiting throughout the world
- To set the above in a clearly understood and legally coherent framework.

And the Board was instructed to further develop its Statutes and procedures as follows

- To review its constitution and statutes working together with the Commissions, Continental and National Federations and bring proposals to a Congress
- Such a review will include feasibility of the establishment of a clear representative link between the Continental Federations and the Board, so that Congress may elect, following a primary election process, representatives acceptable to each Continental Federation, consistent with the laws governing the FIP as a whole.
- To develop a three-year rolling priority programme of work, to be approved by Congress, systematically involving the Commissions, the continental federations and national federations, and which will be reviewed, developed and approved by every Congress thereafter.
- To improve communications through the use of the internet, notably by modernising the FIP website, improving the distribution of information, with the intention of widening knowledge of the FIP and its objectives and directly communicating with exhibitors at all levels.
- To sponsor Exhibitions in each Continental Federation in turn, on a three-year cycle, and, with support of that Continental Federation, with the objective of promoting philately at all levels.
- In furtherance of the above objectives, to establish a FIP Exhibitors Club, free of charge to all who exhibit through FIP exhibitions of any kind. All exhibitors will be enrolled automatically and will receive a digital copy of *FLASH* or any successor publication, updated documents, discussion papers, PowerPoints or whatever else is produced by the Board or its Commissions

Any final proposals must be defensible in accordance with the laws of Switzerland and subject to legal advice which must be circulated to all federal affiliates together with the proposals, including any legal briefing documentation.

The Board was requested to report no later than December 2018. (*FEPA NEWS* Jan 2017).

APPENDIX 4

<p>STRENGTHS Established collector base Established dealer network International scope World/continental/National organisations Information on the internet Availability of catalogues Internet discussion forums Ready availability of material vis the internet and public auctions</p>	<p>OPPORTUNITIES Attracting the (young) retired Attracting children Improving the image of philately Collaboration with local/family history societies Collaboration with other groups (e.g. Probus, Rotary, U3A) New types of material to study and collect</p>
<p>WEAKNESSES Aging of collectors Lack of permanent infrastructure Large number of 'hidden' collectors Low level of funding in some countries Lack of willing workers in societies Lack of new collectors (notably children) Perception of Societies (boring and peopled by experts)</p>	<p>THREATS Poor image of philately Political infighting at the highest level Lack of interest from Postal Authorities The rise of Email and Instagram and Snapchat (and successors) Difficulty of obtaining material Lack of real usage of modern issues Inappropriate use of material for investment Fraud scandals Decrease in number of dealers and shops Caveat Emptor (internet fraud and forgery) The rise of licensed mail with 'Paid' imprints Death (loss of knowledge) Mail centres</p>

APPENDIX 5

The Growth and Decline in Letter Post in the United Kingdom

It is commonly acknowledged that in the last thirty or so years technological change has allowed a much more rapid method on interpersonal communication which resembles letter writing. This is a global trend, but in the UK the situation has been exacerbated since Royal Mail lost its monopoly. It was forced to cut costs to compete, increase postage rates and yet retain the universal service to deliver mail to all 28 million addresses. During the 1980s improvements in communicating by fax had a brief period of success whilst the monopoly was still in force. Messages were sent in facsimile format in text and graphics by telephone and were effectively person to person as much as letters were. Soon networks of individuals were able to send telegraphic-type messages over cable and/or satellite links. Full letters and graphics followed as did other large data sets. The Internet soon allowed potentially anyone with a computer to avail themselves of this capability. Once the public at large became used to mobile telephones, particularly when these became “smart” by allowing access to the Internet and all that was formerly possible between desk-top and other distributed computing facilities, letter writing became old-fashioned. An individual had only to be able to use a keyboard almost anywhere in the world given access to the Internet was possible. Annual reports of Royal Mail and its successors reveal frequent references to the decline of letter post, but it seemed sensible to try to quantify the trend, which has also been observed in many other countries according to UPU statistics.

It was felt that there would be evidence for the decline in annual reports of Royal Mail beginning with 1980-81. From 2000 the Post Office Act set up a regulator allowing greater commercial freedom but from 2002 it was proposed that full competition would be phased in by 2007. But Royal Mail faced full competition from 1 January 2006. The annual report for 2005-06 saw a decline in letters post mentioning the impact of lower-price services and a switch from first to second class. Annual reports of the decline in letter post were the rule after that. The loss on each stamped letter was 6p in 2007-08. In 2008-09 the Chairman spoke of the “unprecedented competition” from electronic communication and the recession that further depressed activity. An interim statement covering 2009-10 used the “average daily mail bag” for the year which had dropped by 7.5% in 2010 the steepest fall since 2005 when it was 84 million items. At length in 2011-12 a standard report of the volume of addressed mail and unaddressed mail resumed and has been maintained to 2016-17. I believe that the use of volume of mail avoids issues such as inflation, and stresses the phenomenon of most interest to philatelists.

From 1980-81 to 2000-2001 annual reports give Millions of : 1st class letters, 2nd class letters, International letters posted. In the period since 2011-12 only domestic letters are reported. The totals for the two series are given below at roughly five year intervals.

Table 1.

The Growth and Decline in Letter post in the UK 1980-2017

Millions	
1980-81	10,066
1985-86	11,721
1990-91	15,902
1995-96	18,322
2000-01	19,864 (international amounted to 772, down from the peak of 839 the year before)

Letters addressed excluding international

	total	addressed	unaddressed
2011-12	18,224	15,147	3,077
2015-16	15,556	12,563	2,993
2016-17	14,856	11,922	2,934

I have the figures in between those quoted above, but it would seem that the decline is being managed by cutting costs of handling. I assume that the above includes those delivered to UK addresses though not originally posted with Royal Mail. It should be said that the parcels business has benefitted from competition and the change in shopping habits towards on-line purchase, remotely or in-store has helped the business. So far, parcels labels do not appear to be attractive to collectors, although information is encountered on their design in the literature.

Sources: Paper copies of Annual Reports of Royal Mail are kept in the Postal Museum, whose help I acknowledge. After 2003, these reports are available there only on-line via the Royal Mail Group web site/investors/results & reports. It would be interesting to know if these are available to the BL or UPU.

Chris Board

ANNEX 1 (not supplied here)

A: Summary on The Future of Philately Summit held at the American Philatelic Center, Bellefonte, PA on October 28, 2016.

stamps.org/userfiles/file/reports/FOP-Summit-Summary.pdf