

ninamedia**research**

Č i n i s l i k u p o t p u n o m

**Research of the level of satisfaction of needs of users of
universal postal service
- Natural entities -**



ninamedia

10th
Anniversary

Methodology

Aim of the research was to examine the level of satisfaction of needs of users of universal postal service.

Sampling frame: population of Republic of Serbia without KiM, aged 18 and over

Sample size: 1200

Control: Telephone (20% of sample) and logical (software).

Post-stratification was done based on demographic variables: education and years of age

Data analysis: Descriptive statistics: %, frequencies. Inferential statistics: chi-square test. Statistical importance is mentioned everywhere.

Questionnaire: made in cooperation with the client

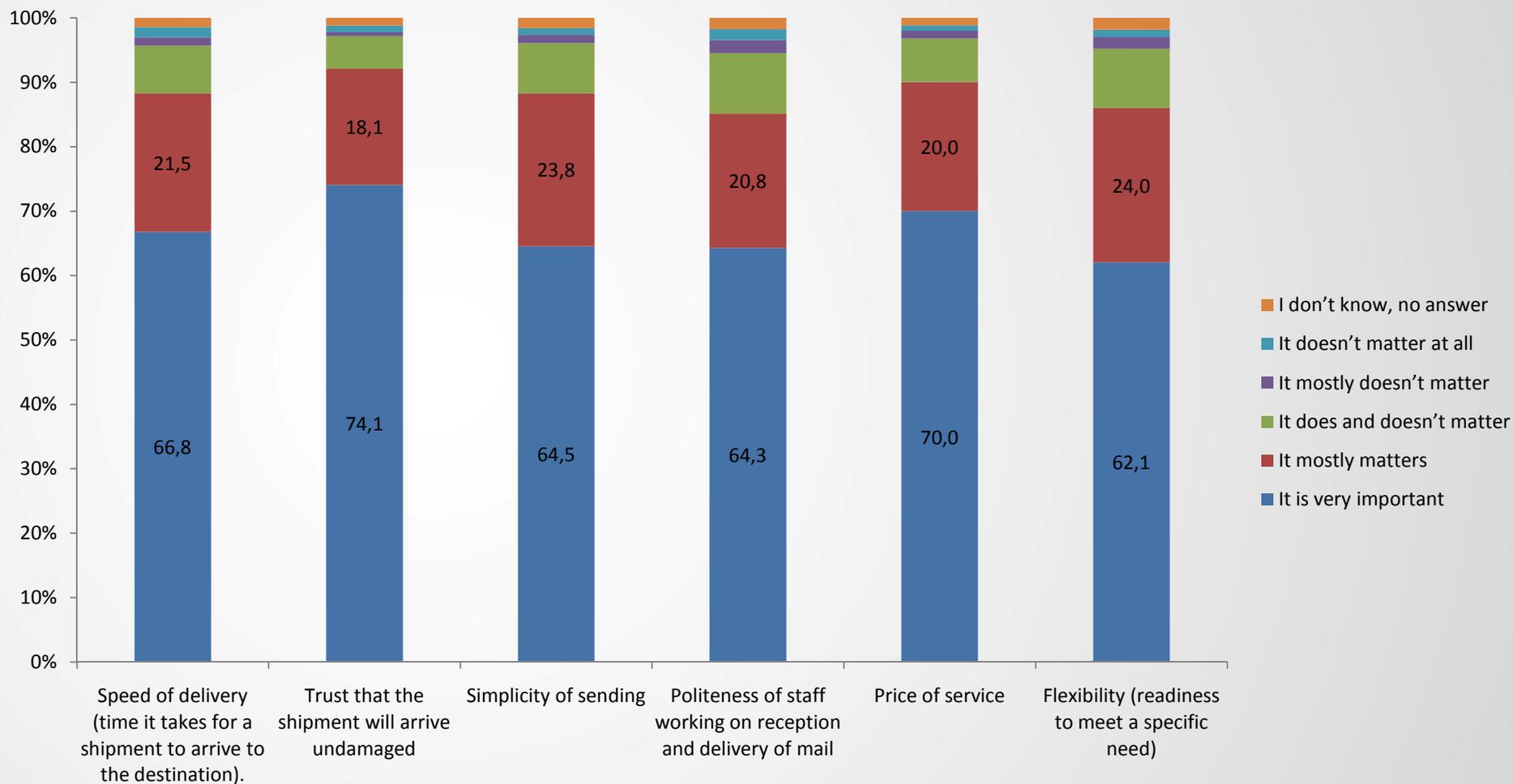
Socio-demographic features

	N	%
Gender		
Male	553	46,1
Female	646	53,9
Age		
18-29	252	21,0
30-44	290	24,2
45-59	301	25,1
60+	356	29,7
Education		
No school, unfinished primary school, primary school	302	25,2
3-year or 2-year high school	249	20,8
4-year high school, grammar school, specialization	414	34,5
Faculty+	235	19,6
Type of settlement		
City	646	53,9
Suburban	553	46,1
Region		
Vojvodina	320	26,7
Belgrade	277	23,1
Šumadija and West Serbia	394	32,8
South and East Serbia	208	17,4
Employment Status		
Employed	534	44,5
Unemployed	305	25,4
Pensioner	299	25,0
I don't want to respond*	61	5,1

IMPORTANCE OF POSTAL SERVICES

- 75.1% of respondents say that services of reception and sending of mail are very or mostly important to them
- They are more important to older respondents and those from Belgrade
- The most important thing is that they have trust that a shipment will arrive undamaged, next is the price

Now we'd like you to say how much do the following features regarding sending of shipments are important to you personally:



USING POSTAL SERVICES AND THE WAY OF SENDING SHIPMENTS

- Low frequency of sending shipments
- Paying of bills and payment operations on current accounts are used frequently
- However: There is a perception that these services are IMPORTANT
- Post of Serbia is used the most for sending shipments
- Exception: International packages

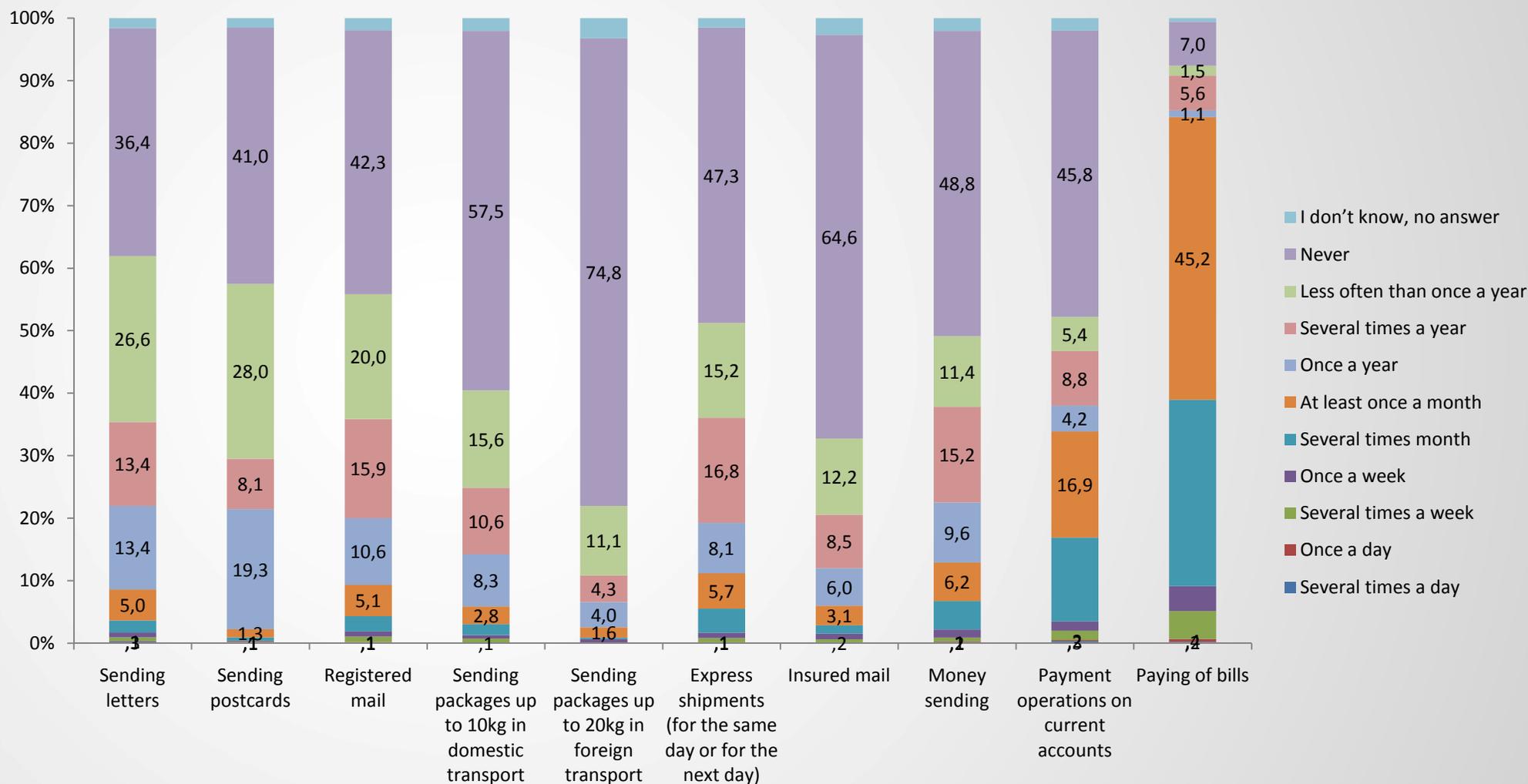
USING POSTAL SERVICES AND THE WAY OF SENDING SHIPMENTS

- 67.4% of respondents do not send letters and postcards at all.
- 60.9% said they did not receive letters and postcards at all, while about one third accepts 1-3 postcards or letters a month.
- Only 1% receives electronic bills

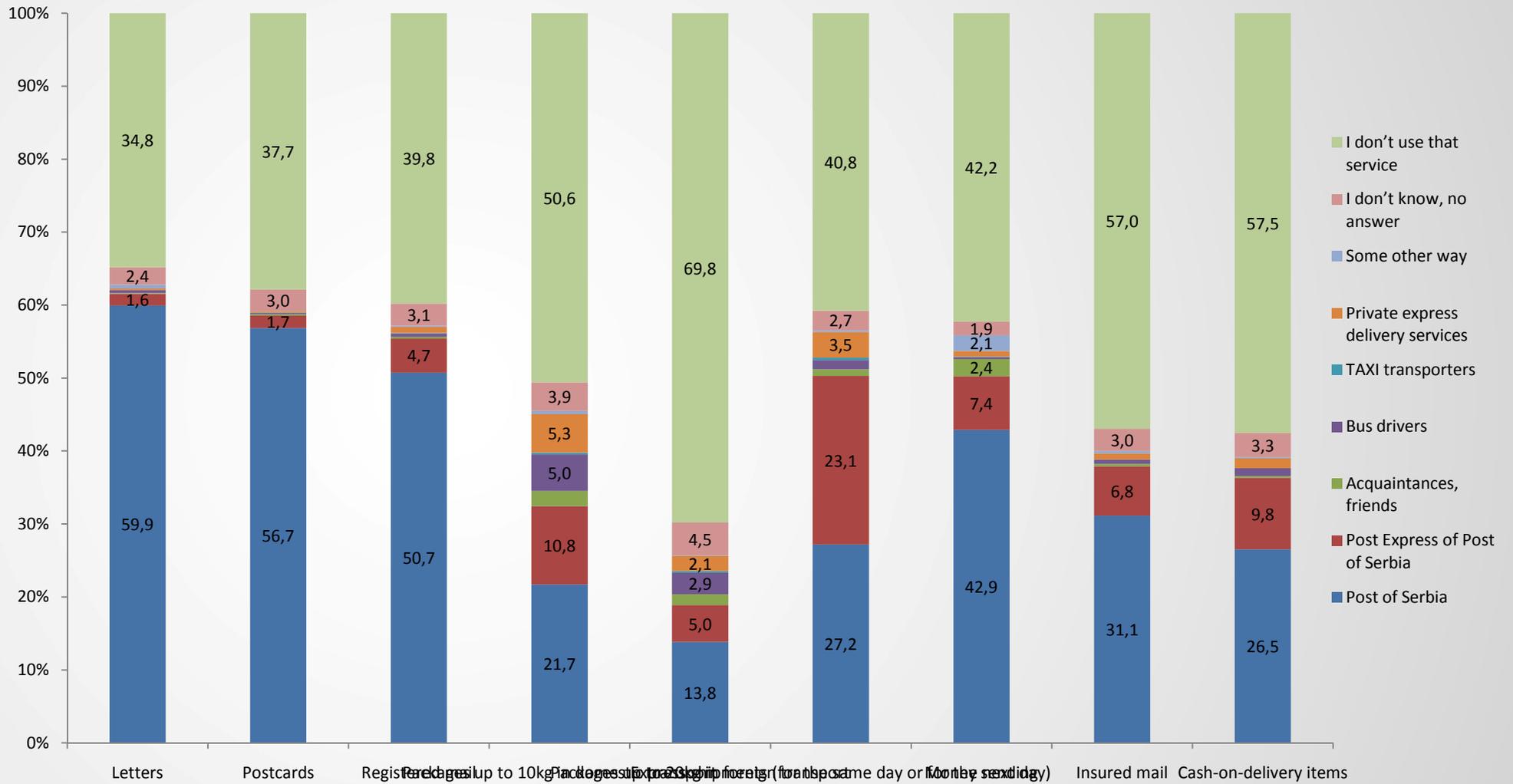
USING POSTAL SERVICES AND THE WAY OF SENDING SHIPMENTS

- A quarter of respondents uses postal services for shipping of goods they bought remotely.
- Decision on delivery of goods is made equally based on simplicity and speed of delivery, price is the third factor that affects decision-making.

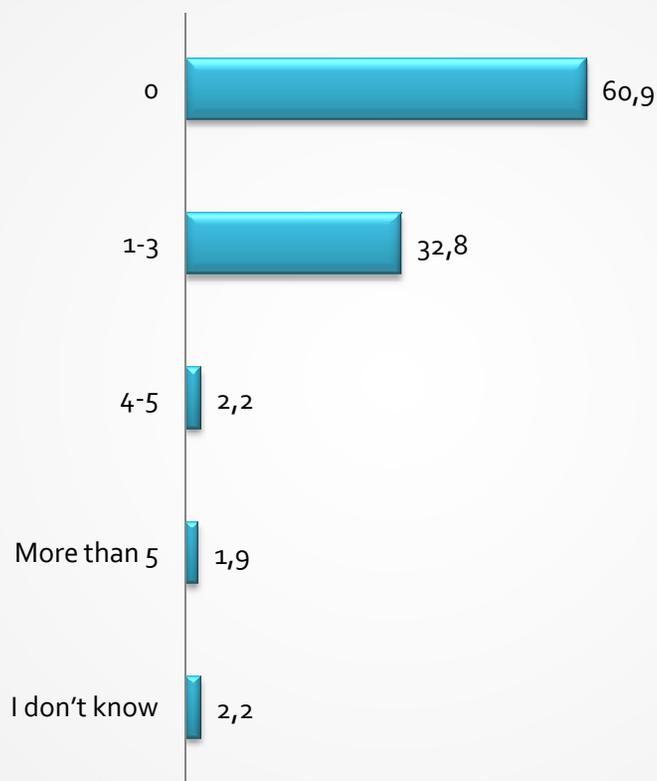
How often do you use the following postal services?



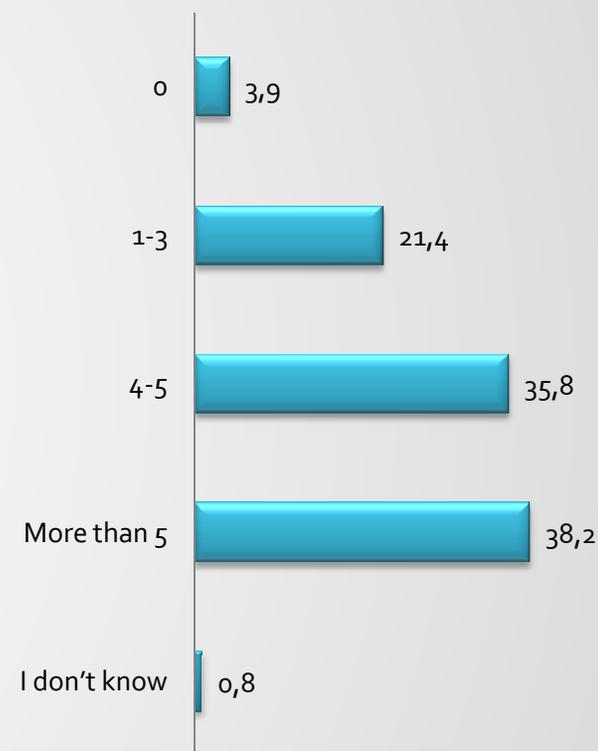
How do you send shipments?



How many letters and postcards do you receive each month on average? (%)

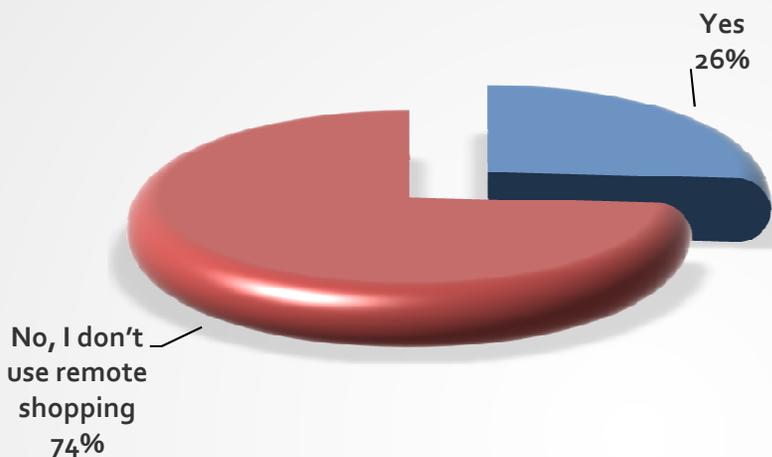


How many bills do you receive each month on average? (%)



➤ In accordance with the low percentage of respondents who send letters, the percentage of respondents who receive letters and postcards is also low.

Do you use postal services for delivery of goods you bought (remote shopping)?



You decide on how to deliver the remotely purchased goods based on: (%)

Subsample of 26.2% of respondents using postal services for delivery of goods they bought (remote shopping).



We will read to you a list of potential delivery methods . Please say how frequently do you use these delivery methods . (%)

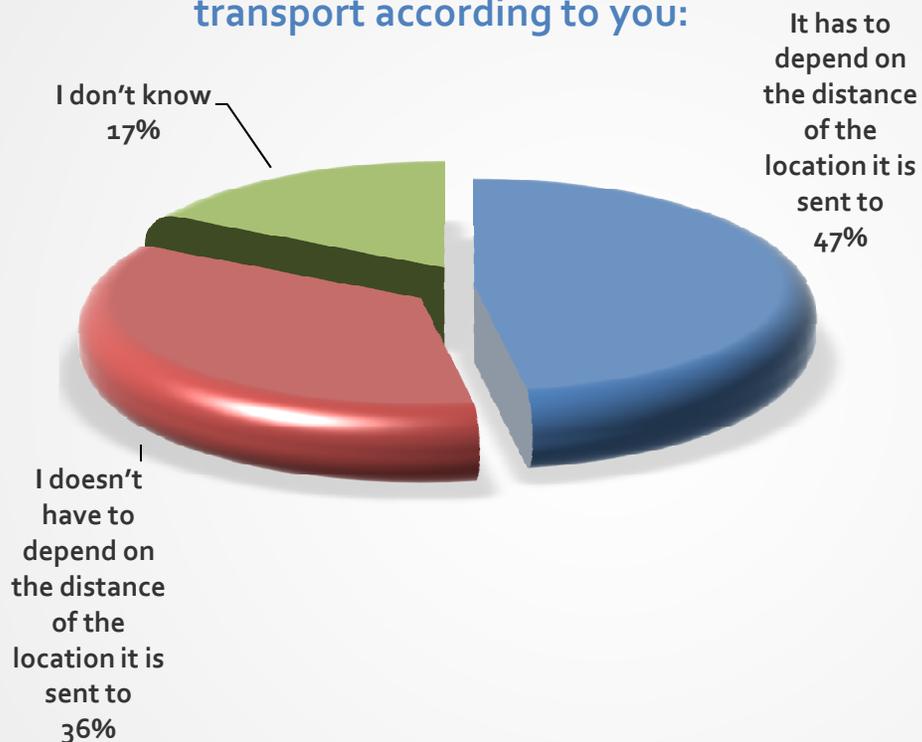
Subsample of 26.2% of respondents using postal services for delivery of goods they bought (remote shopping).

	Regular package via Post of Serbia	Epxress package via Post Express of Post of Serbia	Epxress package via Private postal operator	Via air transporter
Daily	,2	,2	,1	,2
Several times a week	,6	,6	,2	,3
Several times a month	1,8	3,3	2,0	,9
Less frequent than once a month	15,8	15,8	10,3	6,1
I don't use remote shopping	7,7	6,3	13,6	18,7
Total	26,2	26,2	26,2	26,2

KNOWLEDGE OF POSTAL SERVICES

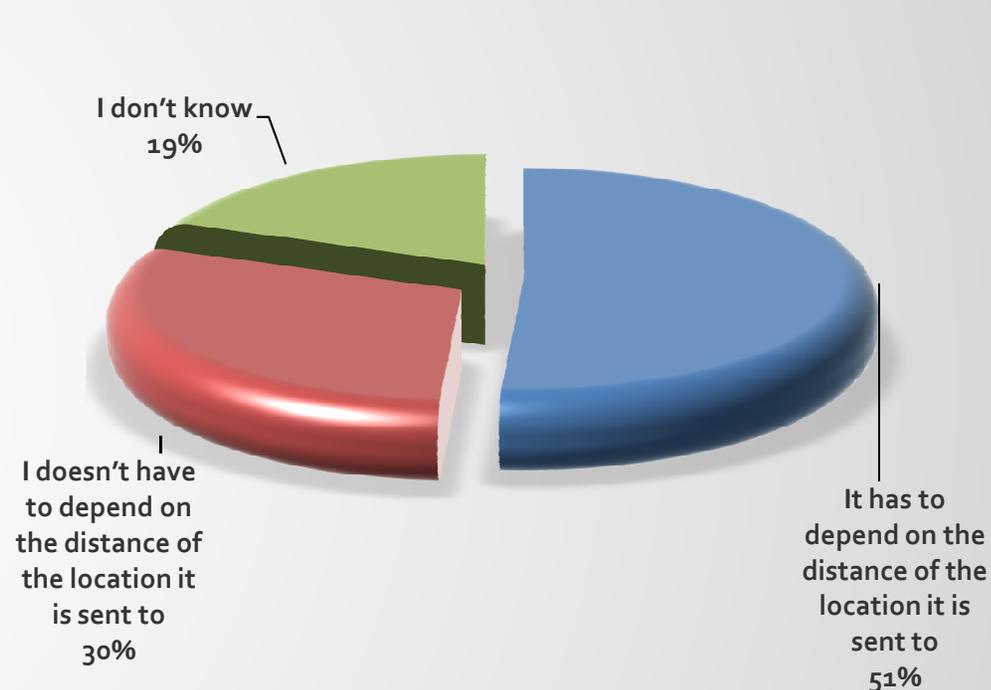
- About half the respondents (47%) think that the price of sending a regular, registered or insured letter has to depend on distance it is sent.
- Most respondents (85.1%) consider reception and sending of letters postal services.

The price of sending a regular, registered or insured mail up to 2 kg in internal transport according to you:



➤ Respondents with higher education and from urban areas mostly say that price of sending a regular, registered or insured mail should depend on the distance, while pensioners mostly say they don't know the answer.

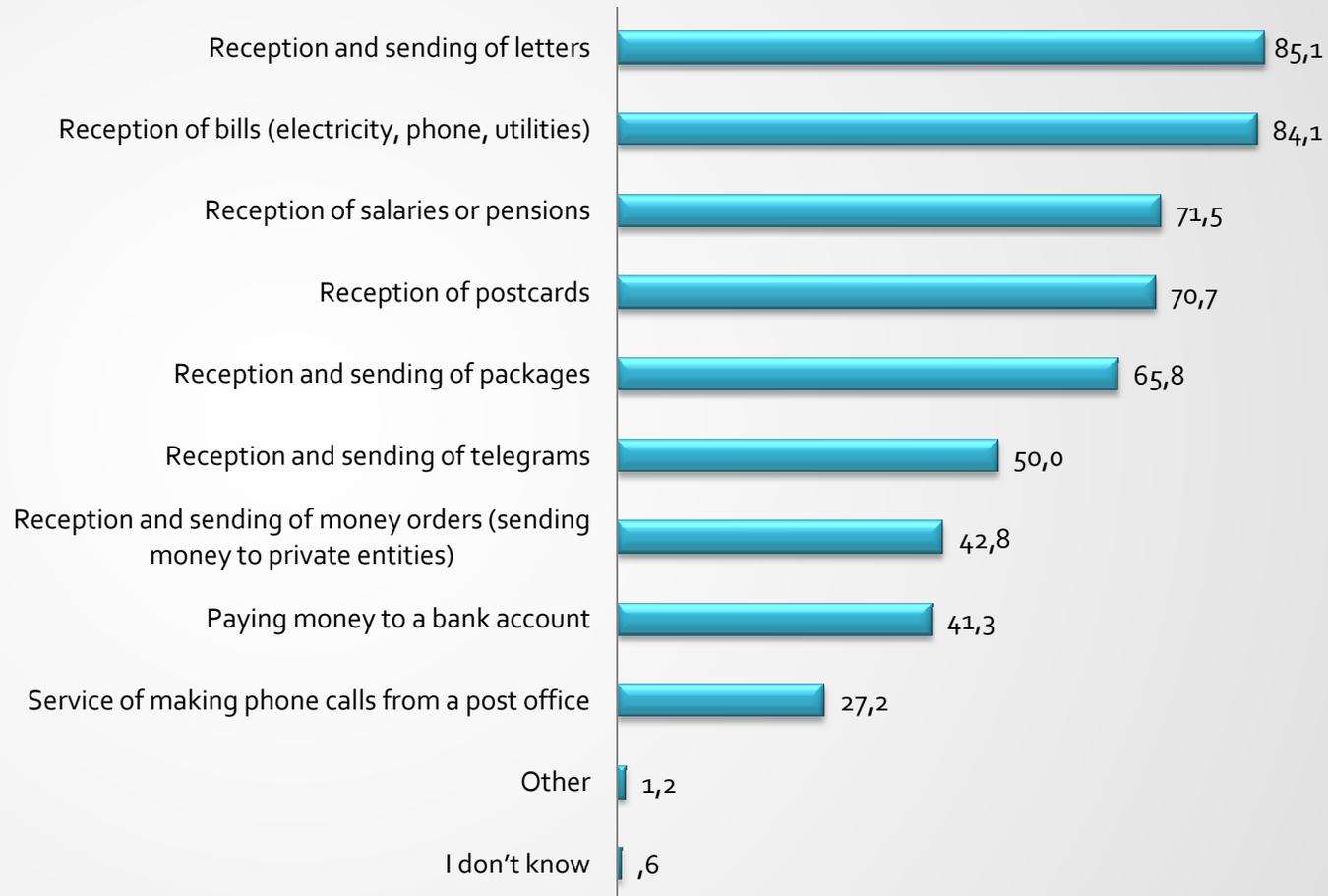
Price of sending a package up to 10kg in internal transport, according to you:



➤ Respondents with higher education, from urban areas and Belgrade say, just like for mail, that the price should depend on the distance the package is sent to, while pensioners mostly say they don't know the answer in this case, too.

Can you tell me what do you consider postal services?

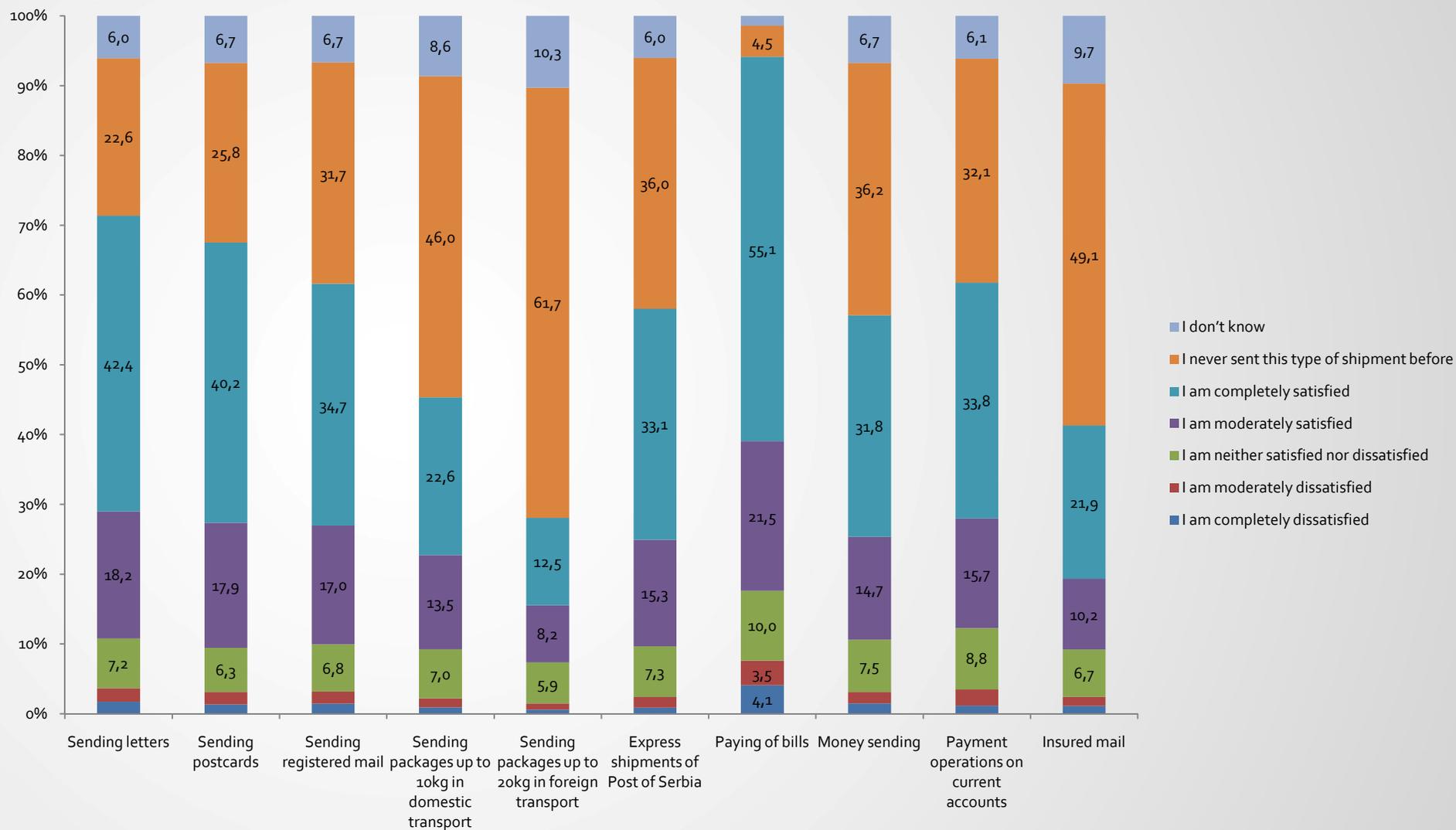
Several answers possible.



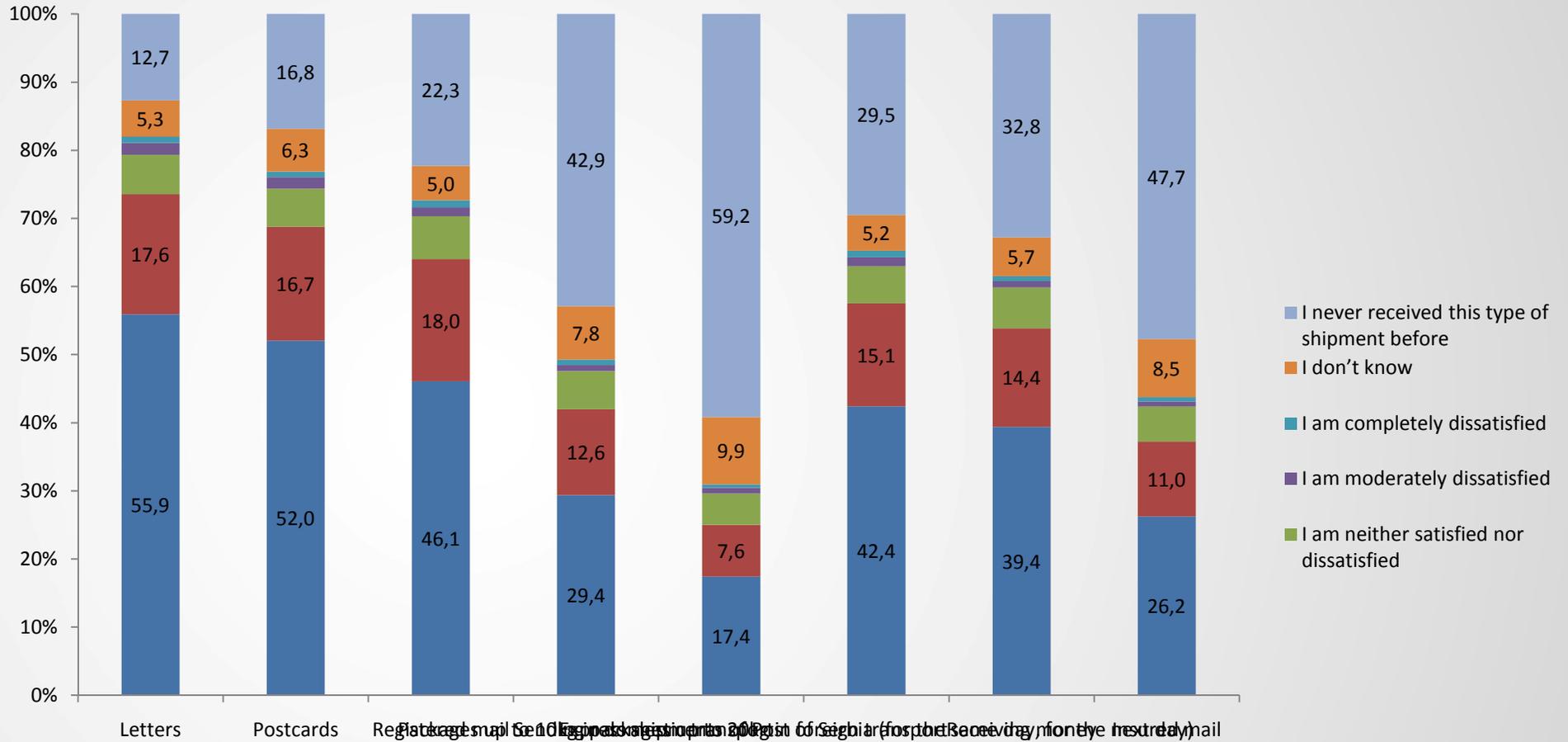
LEVEL OF SATISFACTION WITH POSTAL SERVICES

- Average grade of post office working hours is 4.17/5
- Respondents mostly say they are completely or moderately satisfied with services offered in Post offices of Serbia
- Respondents mention unpleasant staff that delivers a shipment and damage to shipment as the most common reasons for dissatisfaction with shipment delivery.

Can you tell me how pleased are you with the service offered by the Post of Serbia?

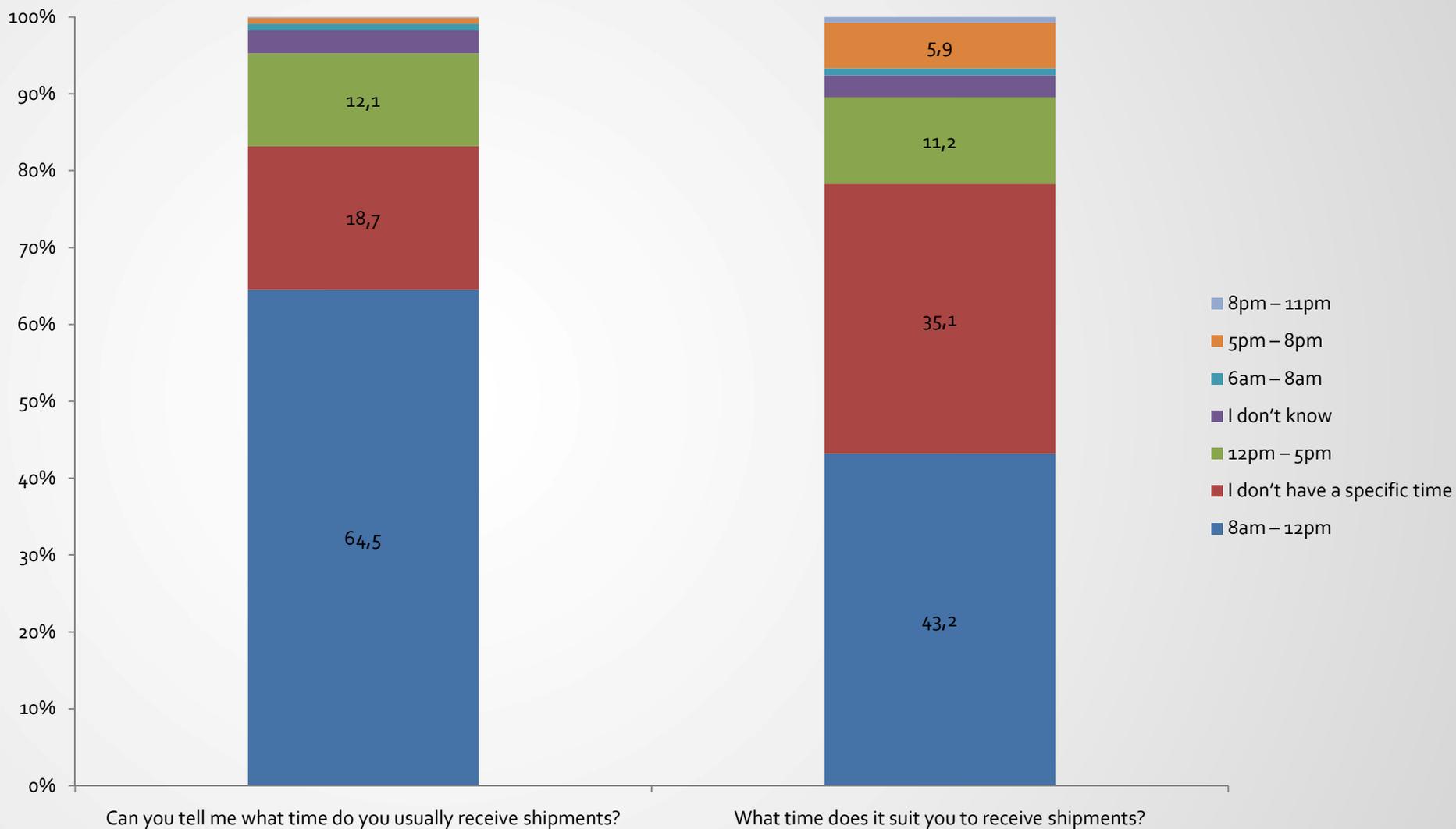


Can you tell me how pleased you are with the way a shipment has been delivered to you?



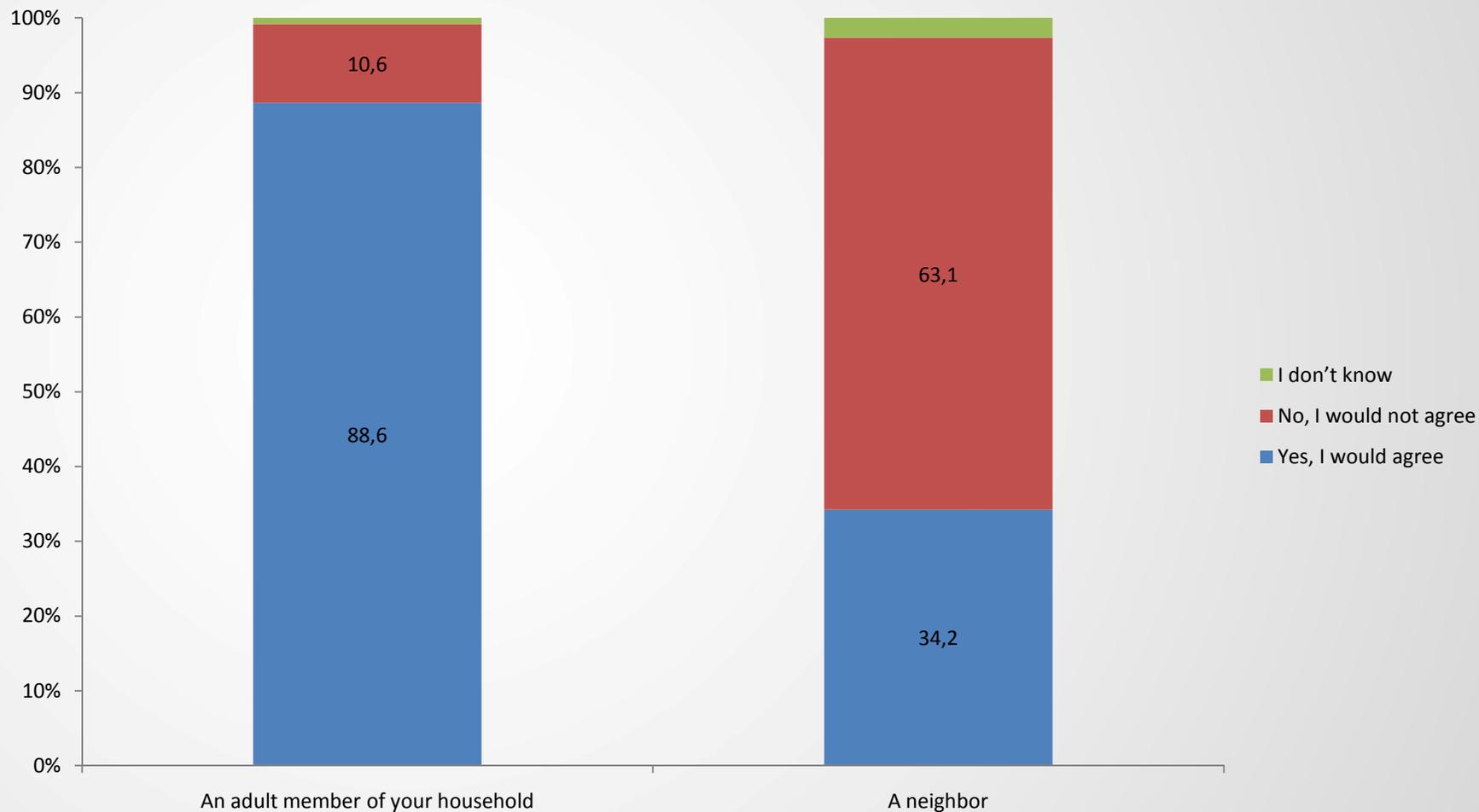
TIME OF RECEPTION

- 64.5% of respondents said they received shipments from 8 to 12 in the morning, while 12.1% received them from 12pm to 5 pm
- Most respondents opted for delivery on 5 workdays a week in the morning and on Saturdays – 79%



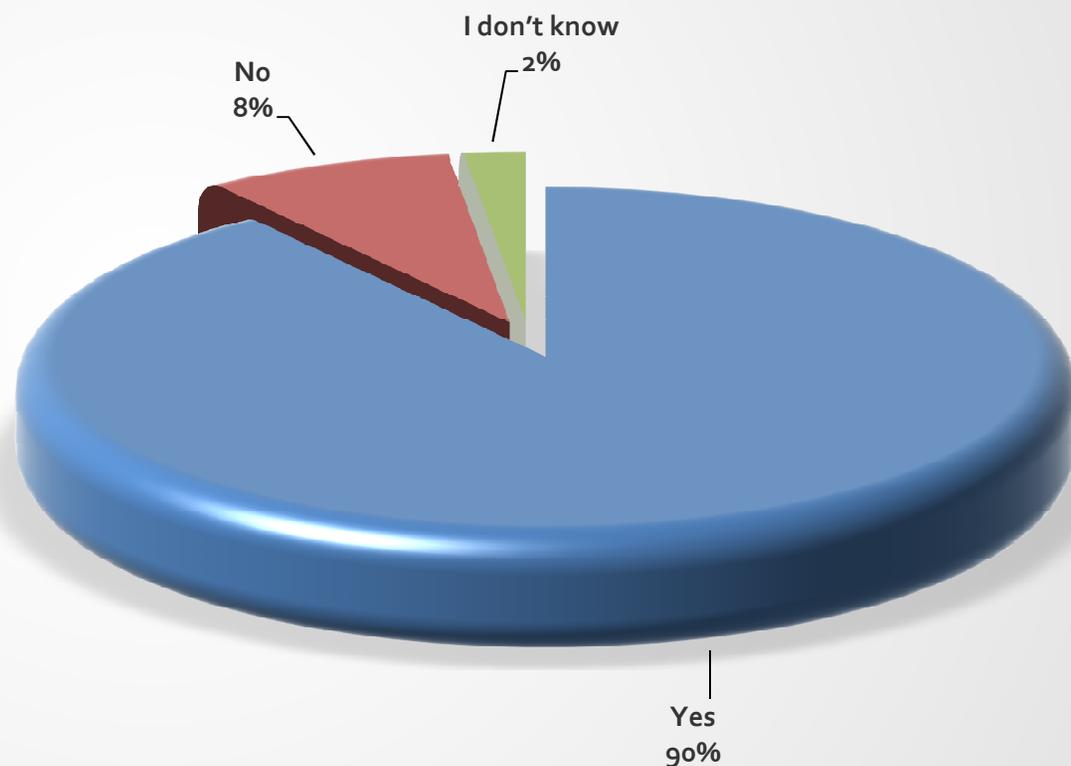
ALTERNATIVE WAYS OF DELIVERING SPECIAL DELIVERY PACKAGES

In case you are unable to receive a shipment personally, would you agree to have it delivered to:



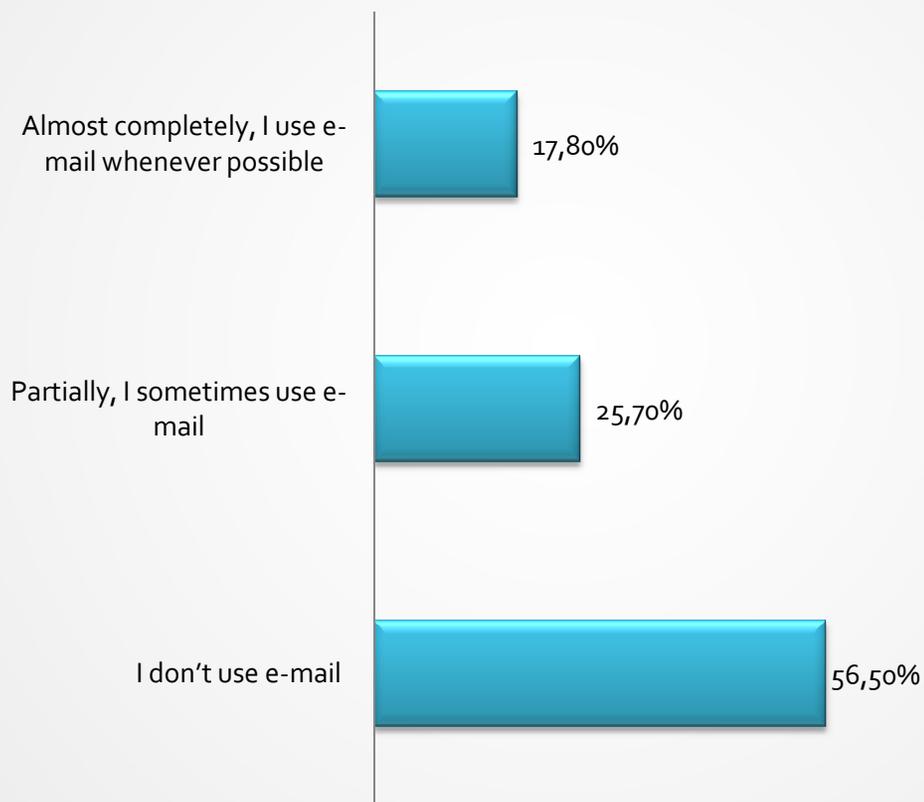
Would it suit you if an adult member of your household or a neighbor took over a shipment in a post office after a report is delivered on shipment arrival?

Subsample of respondents who agreed that a shipment could be taken over by a neighbor or an adult household member, shown to add up to 100%

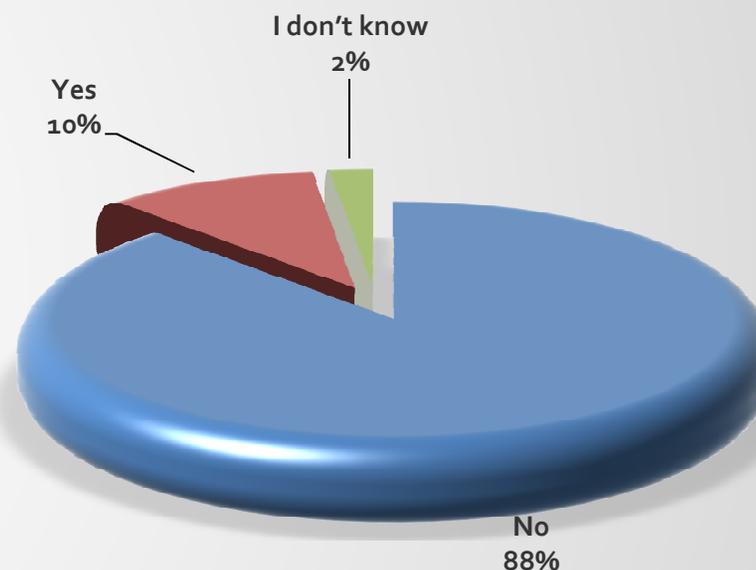


PAYING BILLS, INTERNET

To what extent have you replaced traditional post with Internet and e-mail?

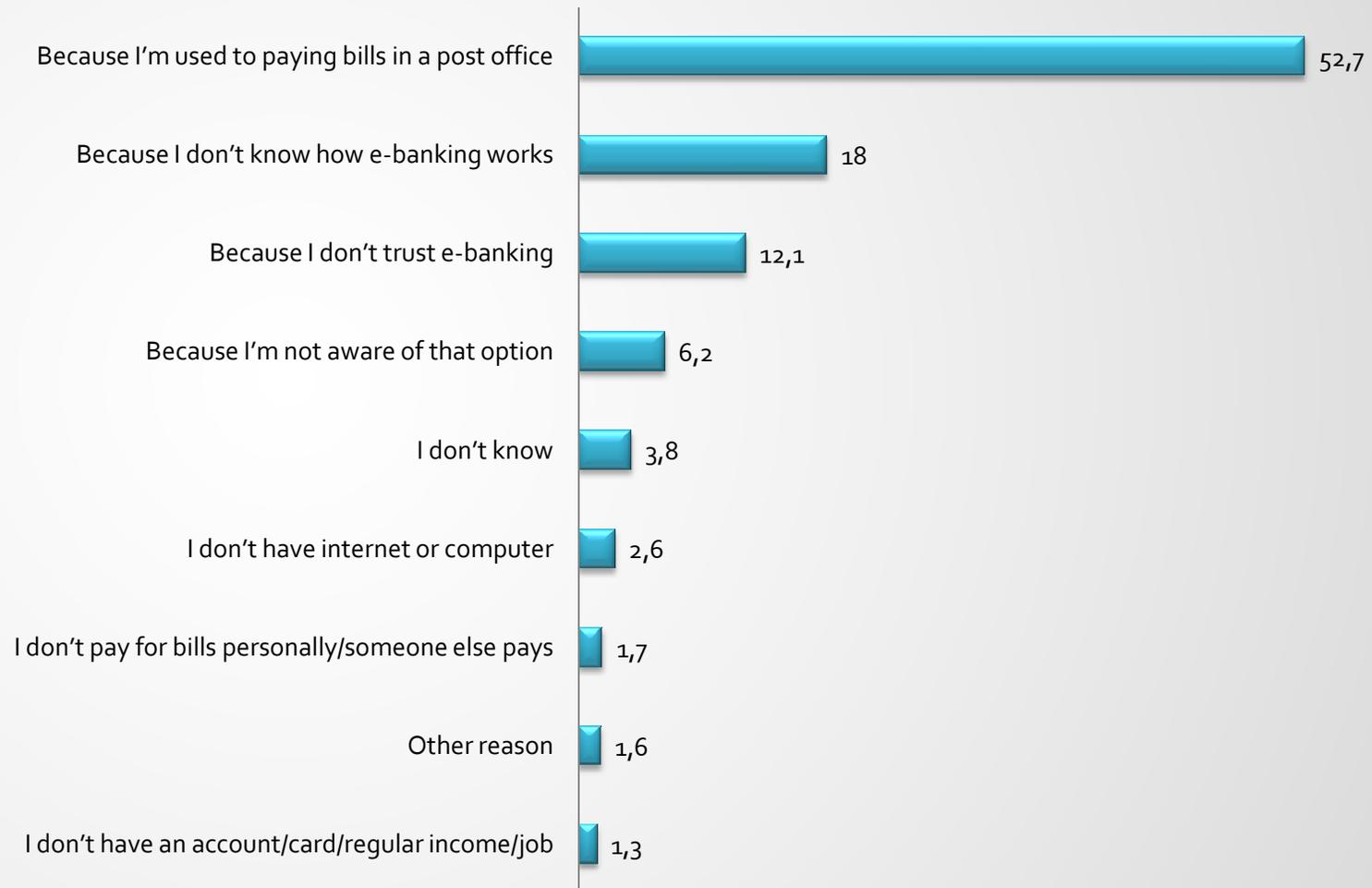


Do you use e-banking for paying of bills?



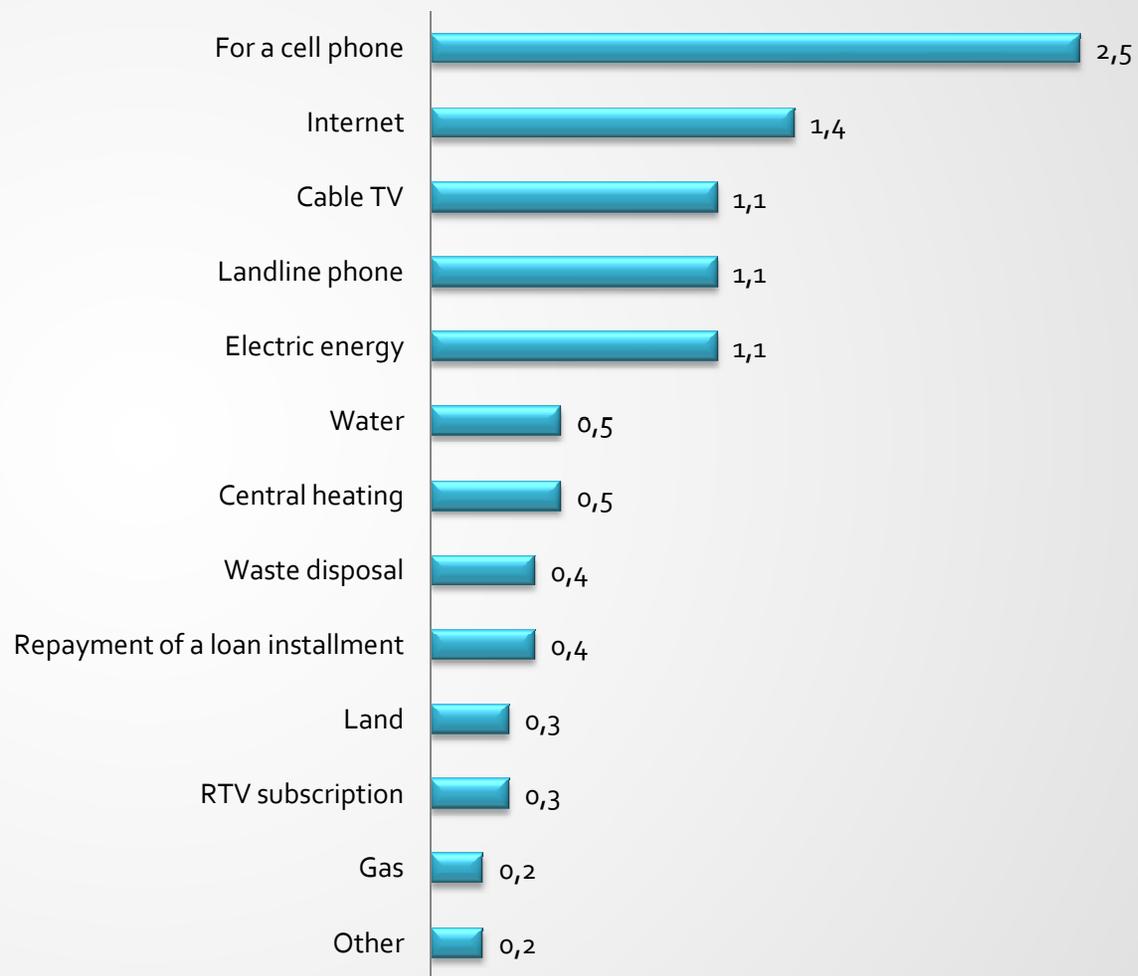
For what reason you don't use e-banking for paying bills?

Subsample of 88% of respondents who don't use e-banking for paying bills, shown to add up to 100%.



Which bills do you pay using e-banking?

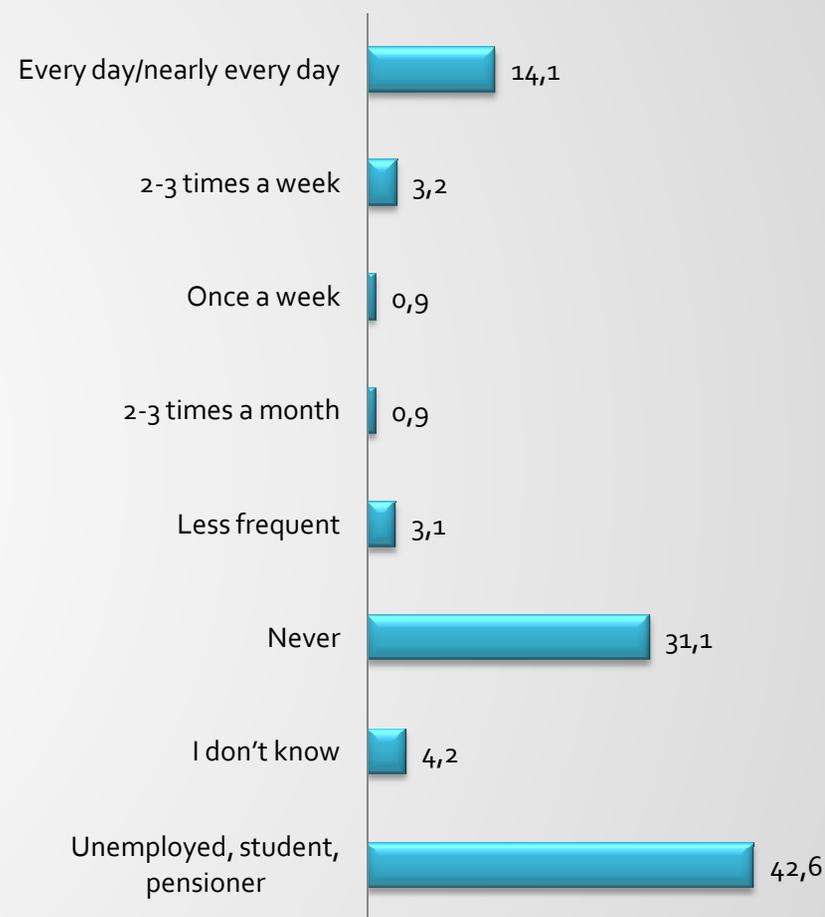
Subsample of 10% of respondents who used e-banking services for paying bills.



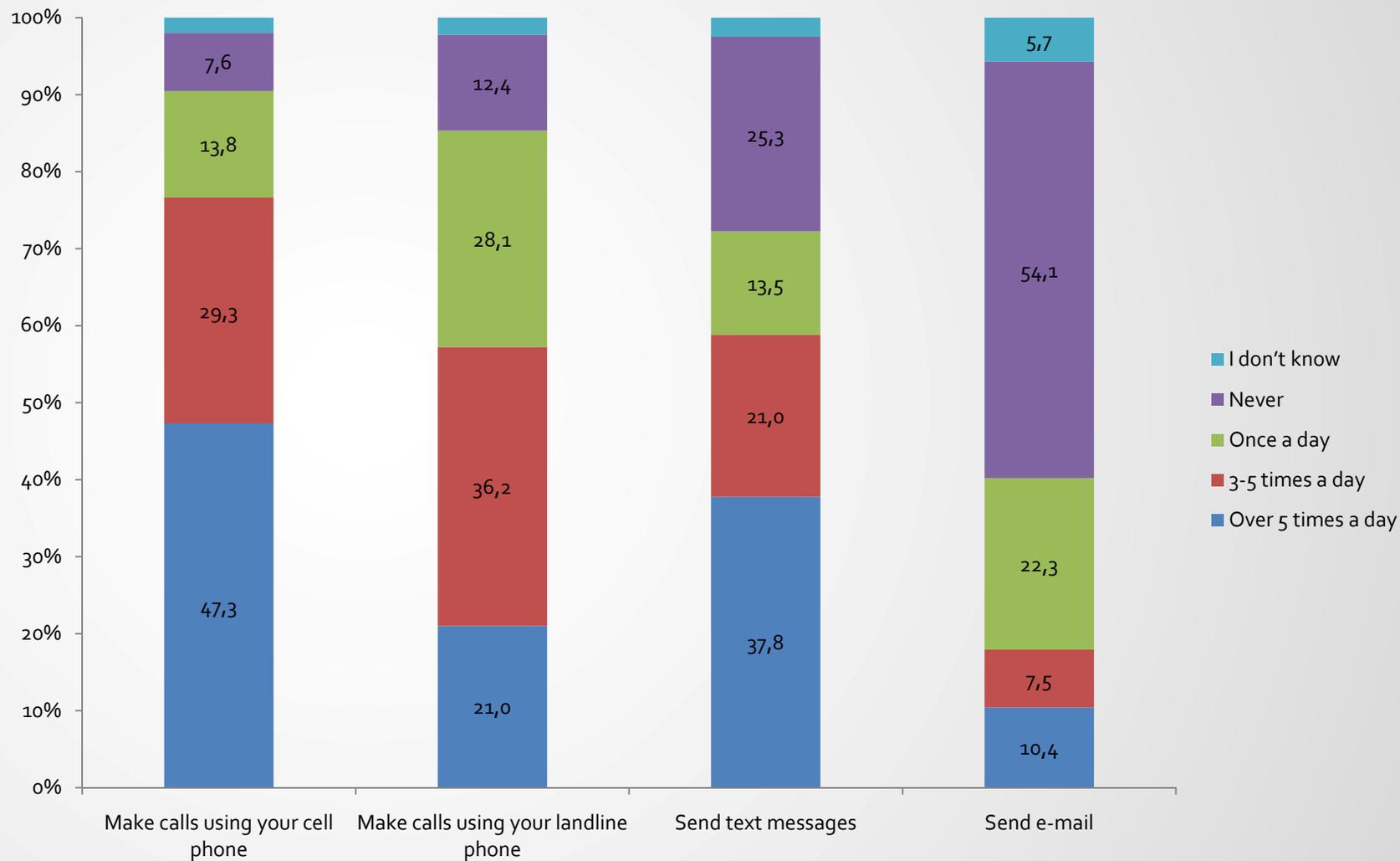
How often do you use Internet at home?



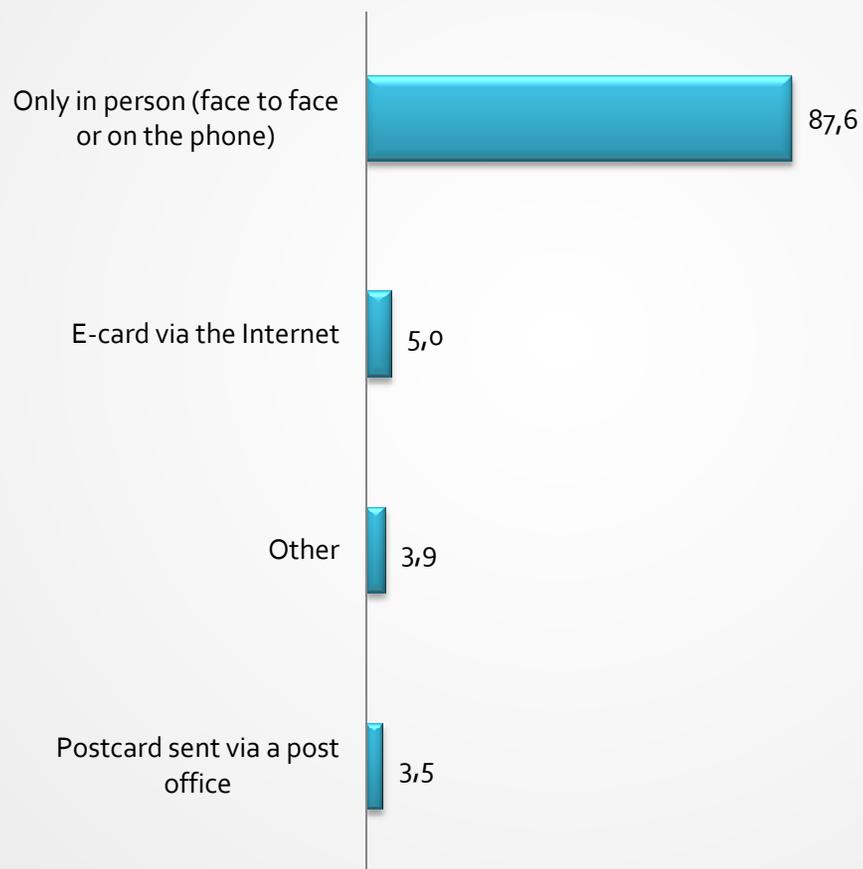
How often do you use Internet at work?



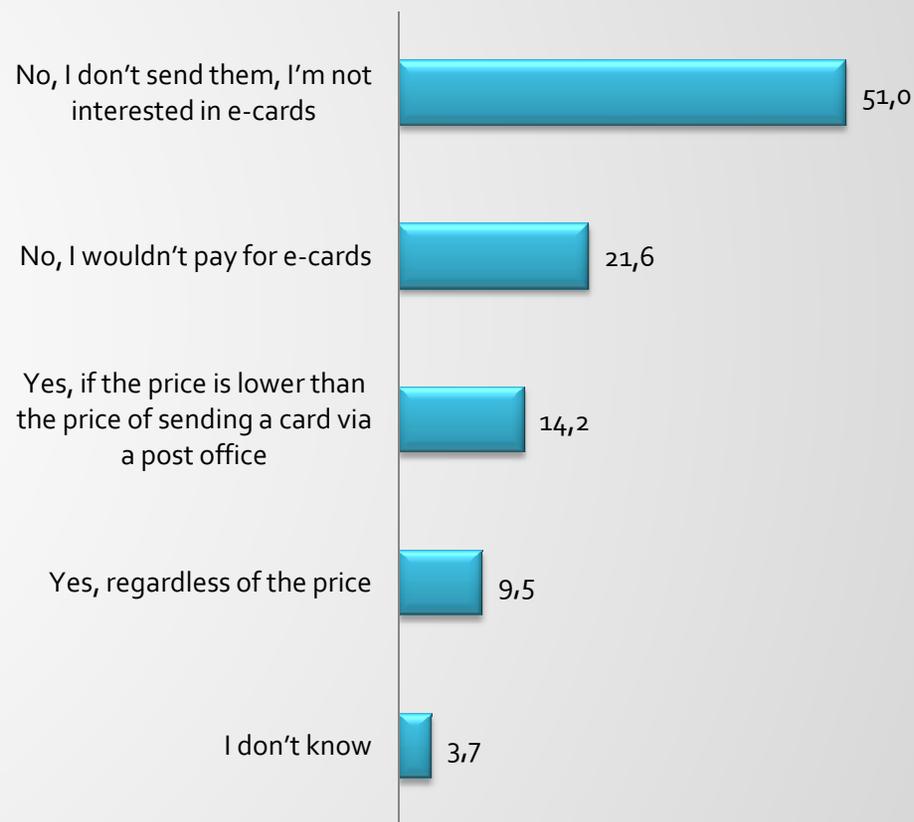
How often during a day do you:



How did you wish your friends and family a Happy New Year this year?



If the Post offered quality designed e-cards especially adjusted for the domestic market (Christmas, New Year, Serbian New Year), would you send such cards?



Thank you for your attention



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