

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
Legal entities**



ninamedia

10th
Anniversary

Researching the level of satisfaction of needs of users of universal postal service Legal entities

PAPI research
(paper and pencil interviewing)

The research was conducted on a sample of N=500 legal entities from Republic of Serbia, without KiM. Data was collected from February 4 to March 3, 2014.

Ninamedia Research
12/03/2014



Methodology

- **Aim of the research** was researching the level of satisfaction with postal services
- **Sampling framework:** balance sheets of legal entities based on reports from 2012. Companies from the main group with income under 10 euros a year were left out, as well as companies with incomplete data in the finished balance sheet. Analysis of income and expenses of companies was done based on reports from 2012 compared to calculation 'other', under the assumption of correlation with using postal services, in order to get more users of those services.
- **Sampling:** the sample was chosen in 2 stages. The 1st stage included companies by field of operations (3 categories) and income (4 categories), total of 12 strata – 400 companies. The 2nd stage was chosen from the main group based on income (100 companies).
- **Sample size:** 500
- **Data analysis:** Descriptive statistics: %, frequencies. Inferencial statistics: chi-square test. Statistical importance mentioned everywhere.
- **Questionnaire:** made in cooperation with the client.

COMPANY SAMPLE

	N	%
Company size		
Small	241	48,3
Medium	144	28,7
Large	115	23,0
Number of employees		
Up to 10	196	39,2
From 11 to 100	153	30,6
Over 100	151	30,2
Type of ownership		
Private	422	84,4
State	78	15,6
Income		
Less than 1 000 000 €	212	42,4
from 1 000 000 to 3 000 000 €	159	31,8
from 3 000 000 to 10 000 000 €	64	12,8
over 10 000 000 €	65	13,0
Operations		
Production	116	23,2
Trade	147	29,4
Other	237	47,4
Region		
Vojvodina	143	28,8
Belgrade	149	29,8
East and South Serbia	85	16,9
Šumadija and West Serbia	123	24,5
Total	500	100,0

COMPANY SAMPLE – LARGE SENDERS

	N	%
Company size		
Small	84	36,1
Medium	76	32,6
Large	73	31,3
Number of employees		
Up to 10	53	22,7
From 11 to 100	68	29,2
Over 100	112	48,1
Type of ownership		
Private	178	76,4
State	55	23,6
Income		
Less than 1 000 000 €	67	28,8
from 1 000 000 to 3 000 000 €	84	36,1
from 3 000 000 to 10 000 000 €	37	15,9
over 10 000 000 €	45	19,3
Operations		
Production	54	23,2
Trade	52	22,3
Other	127	54,5
Region		
Vojvodina	73	31,3
Belgrade	75	32,2
East and South Serbia	33	14,2
Šumadija and West Serbia	52	22,3
Total	233	100,0

RECOGNIZABILITY OF POSTAL SERVICES

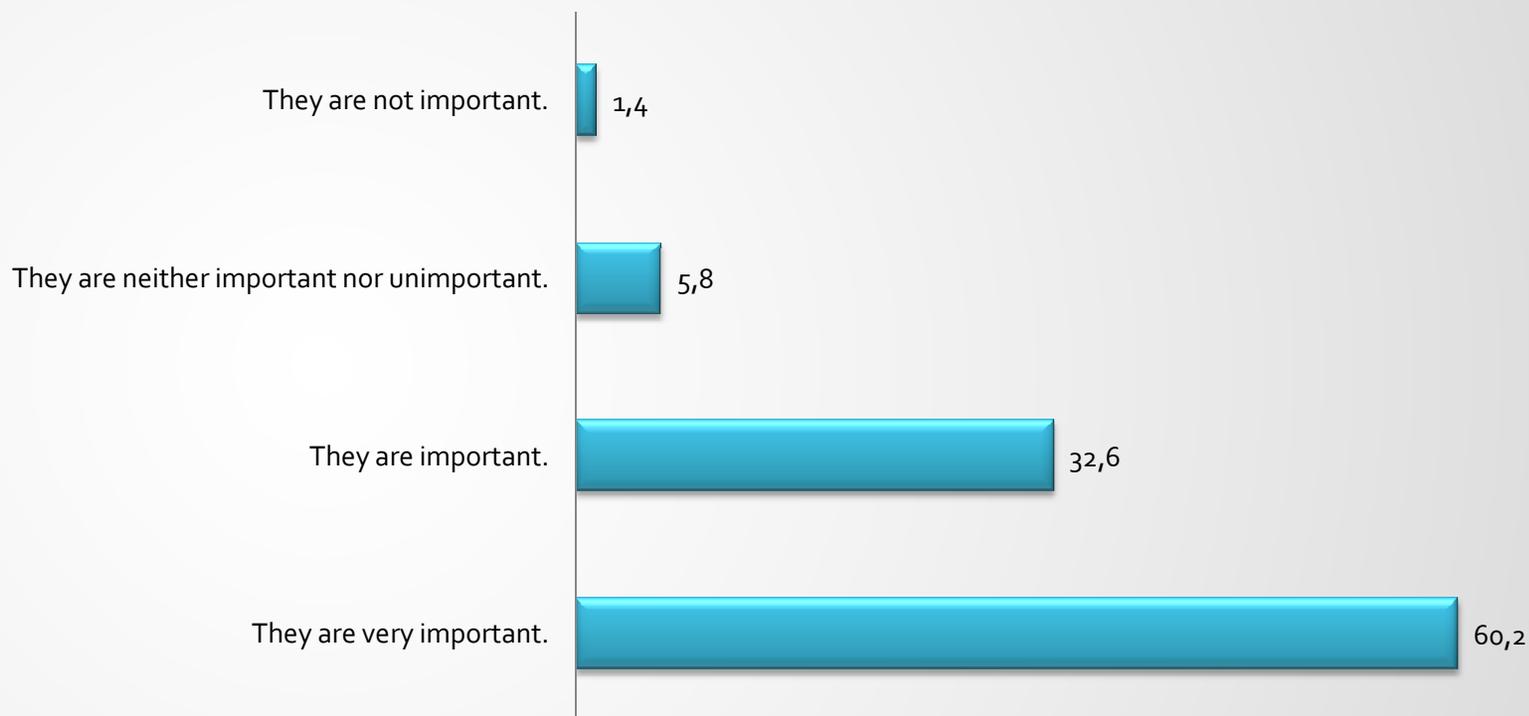
- For over 90% of companies questioned, services of reception and sending of postal shipments are very or mostly important
- Over 60% of respondents know what the postal address code (PAK) is, while about one third don't know.
- 40% of companies said they used PAK. Large and medium companies use PAK more.
- Over 50% of respondents say that the price of sending to remote locations should be higher than for sending to closer locations, 40% of respondents think the opposite

RECOGNIZABILITY OF POSTAL SERVICES

- 48% of companies would be interested in sending shipments at lower prices with additional engagement – sorting and/or transport of shipments to delivery post office.
- Interest in this service rises with company income.
- Companies that deal with production and companies from Vojvodina are also more interested in this service.
- 52% of large senders (over 10 shipments a day) are interested in this service.

Please rate on a scale of 1 to 5, like in school, where 1 means that these services are not at all important and 5 that they are very important, how important are services of reception and sending postal items (packages, letters, documents in paper form, etc.) to your company? (%)

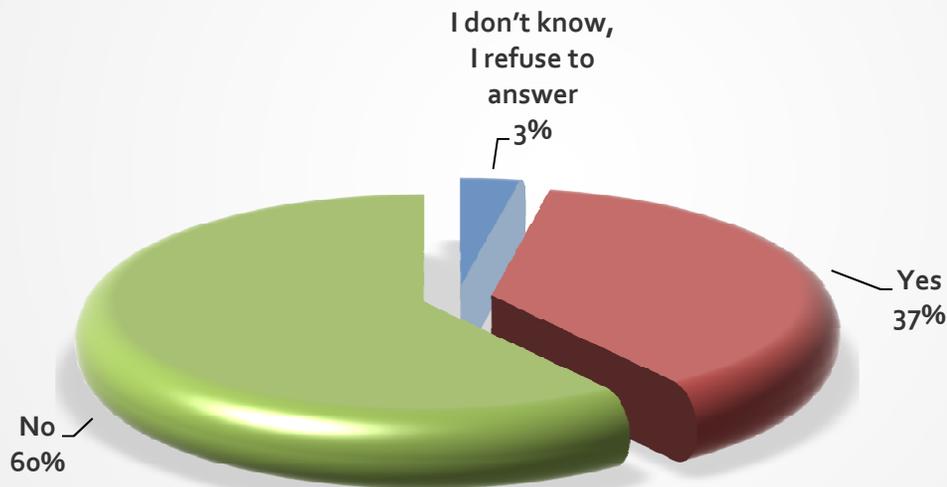
Total sample.



➤ Companies with more employees, and those from East and South Serbia, find postal services very important in a large number.

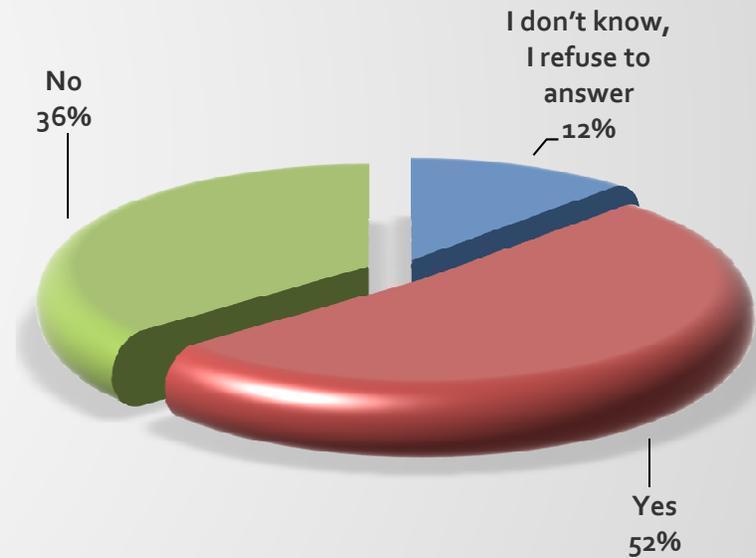
Does your company use postal address code (PAK) when addressing shipment? (%)

Subsample of 61% legal entities who know what PAK is, shown to add up to 100%.



Would your company be interested in sending shipments at a lower prices with your additional engagement - sorting and/or transport of shipments to delivery post office? (%)

Total sample.

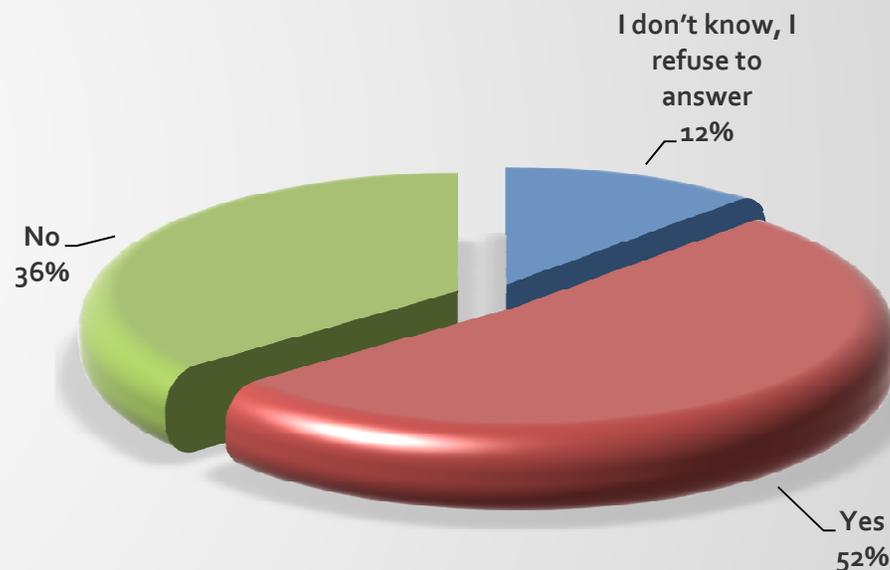


LARGE SENDERS – OVER 10 SHIPMENTS A DAY

Does your company use postal address code (PAK) when addressing shipment?
(%)



Would your company be interested in sending shipments at a lower prices with your additional engagement - sorting and/or transport of shipments to delivery post office?



USING POSTAL SERVICES AND WAY OF SENDING SHIPMENTS

- Services of postal operators are mostly used for business correspondence (66%) or delivering bills (63.2%).
- 23.6% of them send letters once a day, 22% send letters several times a week
- Over half the companies (58%) send shipments directly in a post office, while 42% send shipments via couriers.
- Most shipments are most often sent to another city in Serbia.
- Exception: express mail is mostly sent within the same city.

USING POSTAL SERVICES AND WAY OF SENDING SHIPMENTS

- Letters, registered mail, advertising material, insured mail and bills are mostly sent via Post of Serbia or Post Express service
- Express shipments and packages in domestic transport are mostly sent via Post Express service and private delivery services
- Private delivery services are the 1st choice for sending packages in international transport

USING POSTAL SERVICES AND WAY OF SENDING SHIPMENTS

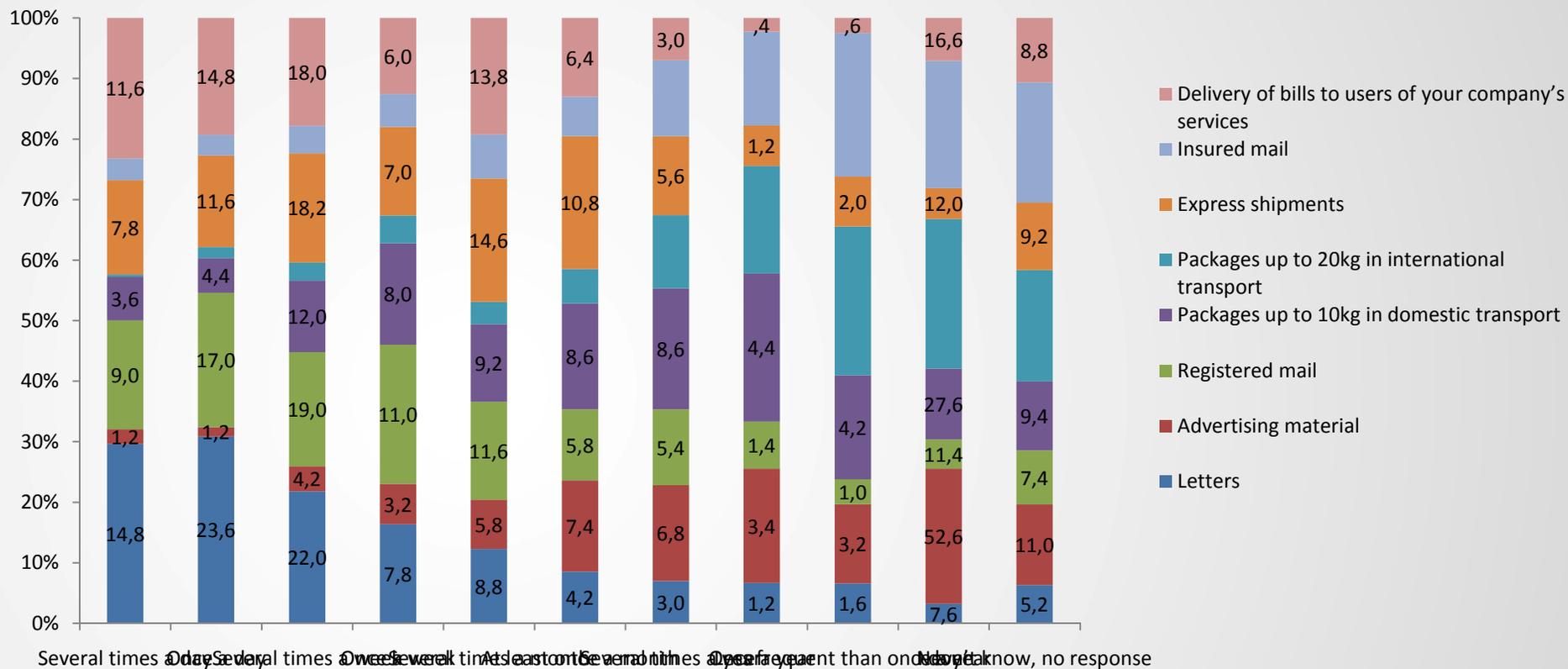
- Most companies questioned send bills to service users (79%). Companies with higher income and more employees send bills to service users in a larger percentage.
- Regular and registered mail is mostly used for sending bills.
- A little over 1 quarter of companies said they used postal services for delivering sold goods. Smaller companies, trade companies and those from Central Serbia use these services more than other companies.

USING POSTAL SERVICES AND WAY OF SENDING SHIPMENTS

- Post Express is used most often for delivering sold goods (10.6% send goods via Post Express daily or several times a week); next are regular packages, sent via private operators (9.4%)
- 22% of companies using services of Post of Serbia for distribution of advertising material via direct mail.
- About 3 quarters of companies said they received shipments on their address, 17.2% use PO Boxes, 14.2% pick up their shipments in offices of Post of Serbia.

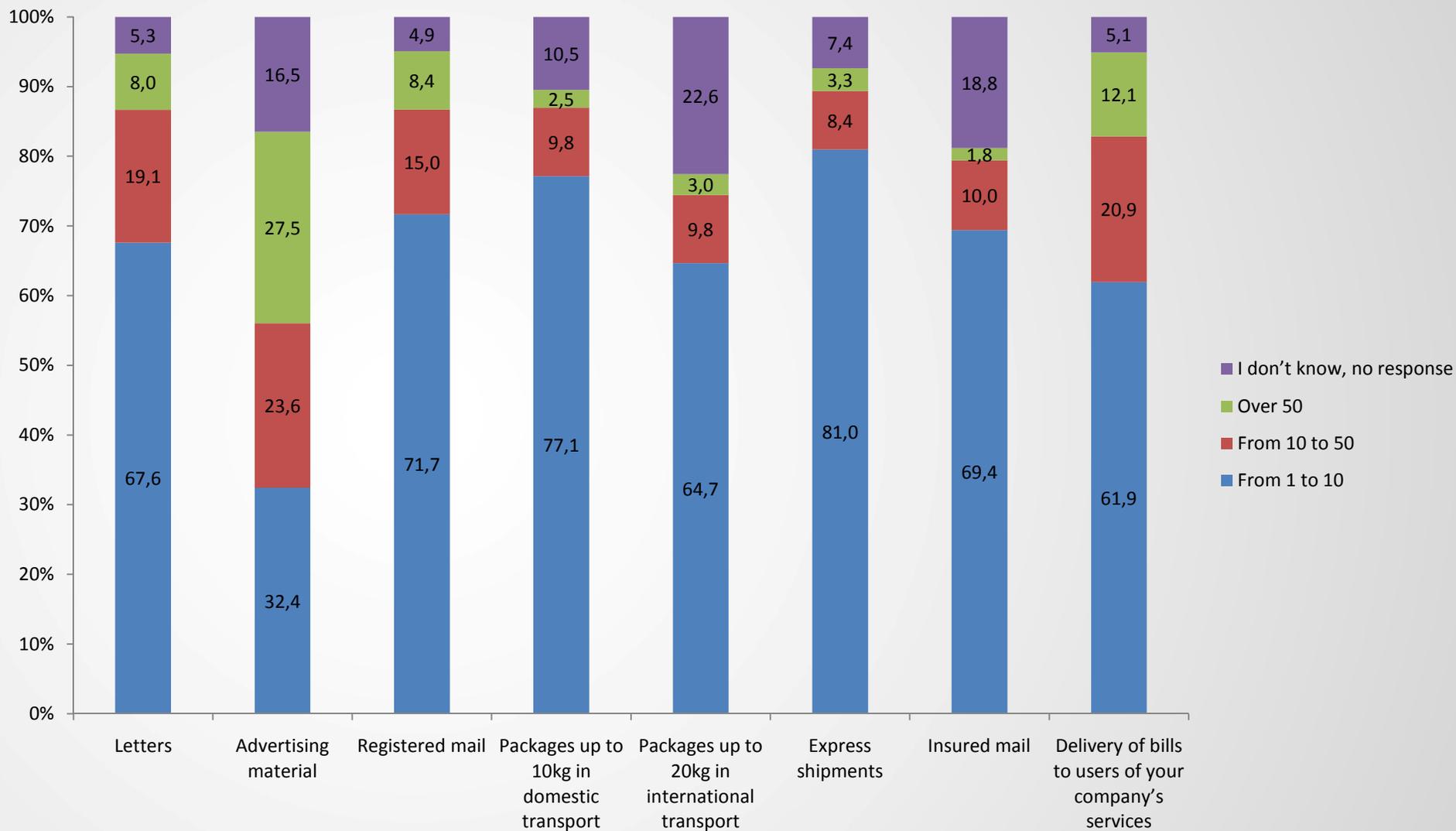
Can you tell us how often does your company send the following shipments? (%)

Total sample.

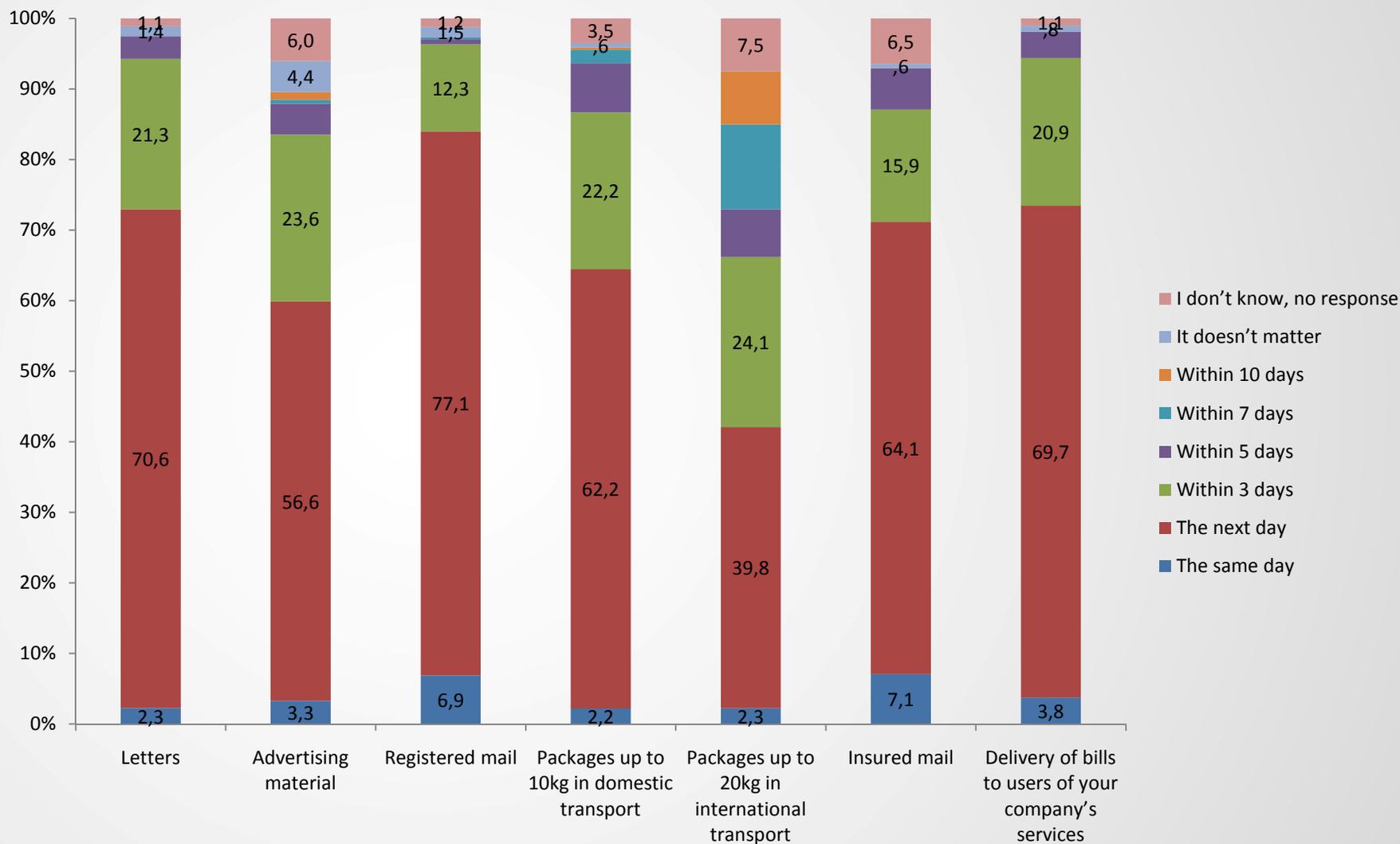


➤ The amount of sent letters increases with company size, number of employees and company income. State companies send letters more than private ones, over 40% of state companies said they sent letters once a day; companies from Belgrade send letters most frequently.

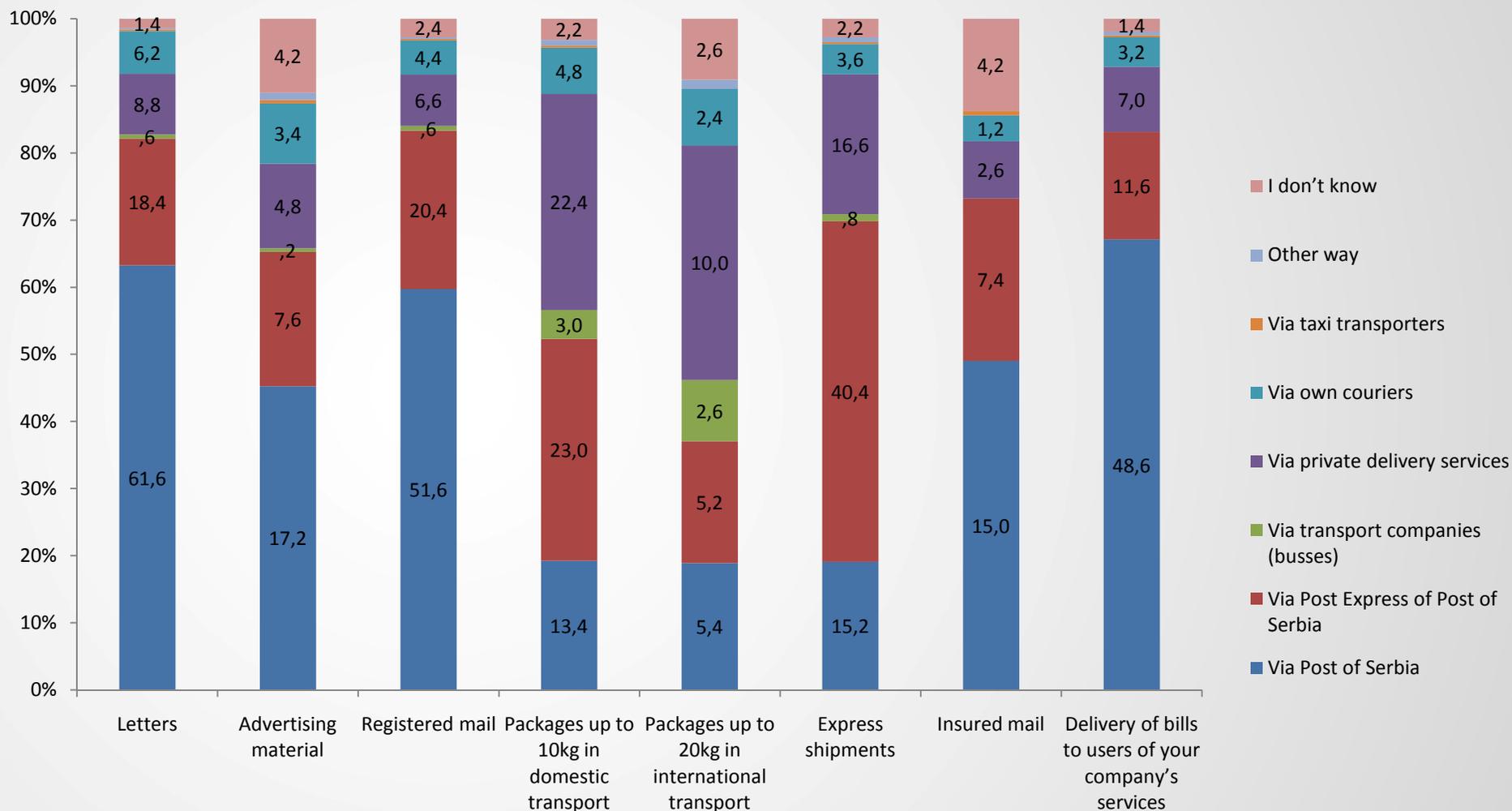
How many items do you send on average in one shipment? (%)



When you send shipments, when do you expect them to be delivered? (%)



Can you please tell me how does your company send the following shipments? (%)



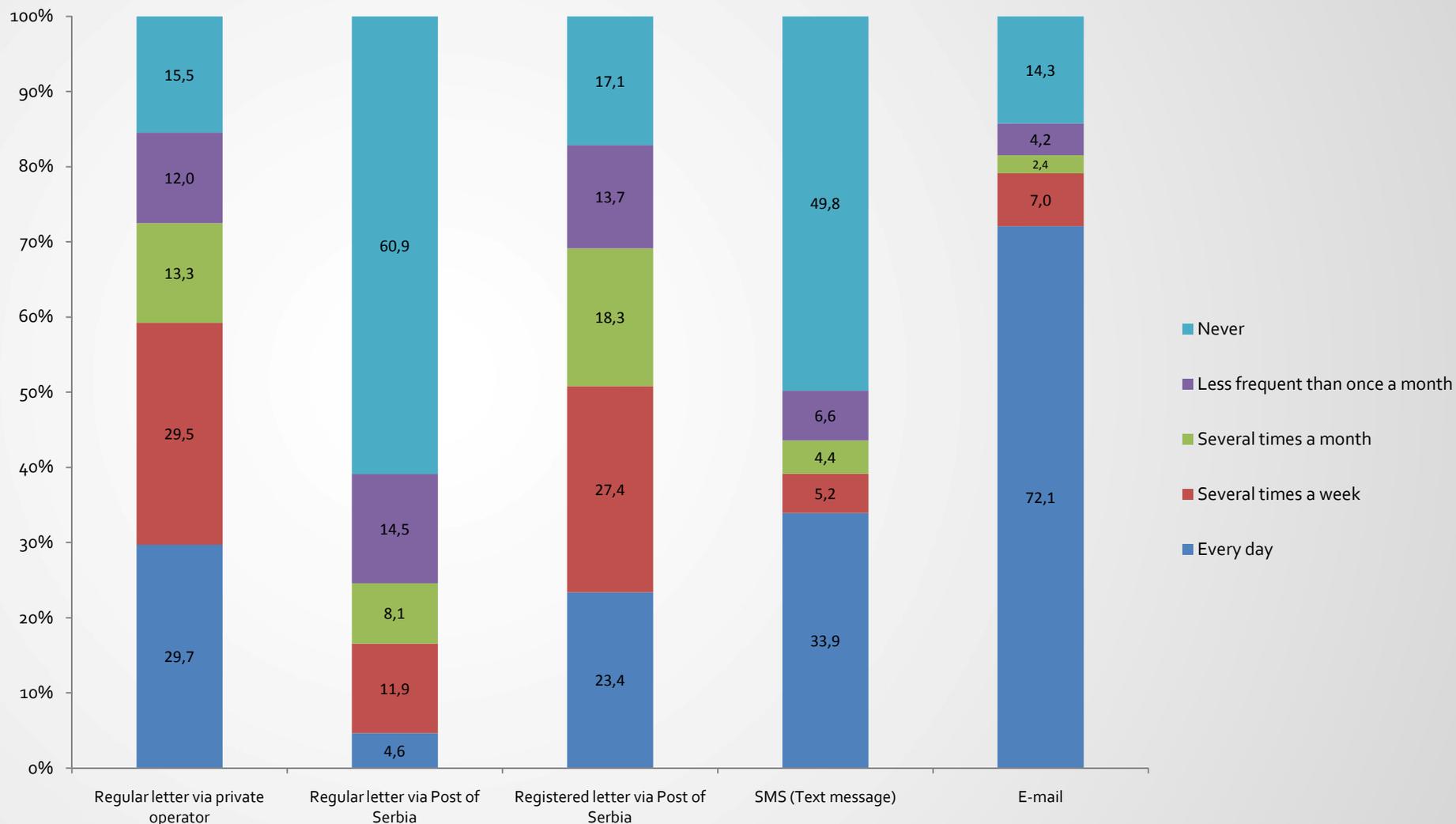
Can you tell me the names of private delivery services you are using when sending?

Subsample of legal entities sending shipments via private delivery services.

	Letters	Advertising material	Registered mail	Packages up to 10kg in domestic transport	Packages up to 20kg in international transport	Express shipments	Insured items	Delivery of bills to users of your company's services
Aks	3,6	1,8	2,8	12,6	4,2	11,4	1,2	4,0
City Express	3,0	2,0	1,6	7,6	1,6	6,2	,2	1,6
DHL	2,9	1,8	2,4	2,4	3,6	2,6	,8	1,4
DMS				,4		,2		,2
YUPD - Dexpers	1,9	,8	,4	3,6	,2	2,4	,2	1,4
Fedex	,8		,4	,6	1,4	,6		,4
Bex	,6	,2		2,2		2,2		
City mail	,4		,8	,2		,2		,6
City delivery	,4		,2	,6	,2	,2		,4
TNT	,4				,4	,4		
Other	,2	,4	,8	,6	,4	,4	,6	,6
Does not know	,6	,4	,2	1,8	1,4	,6	,2	,6
Total	14,8	7,4	9,6	32,6	13,4	27,4	3,2	11,2

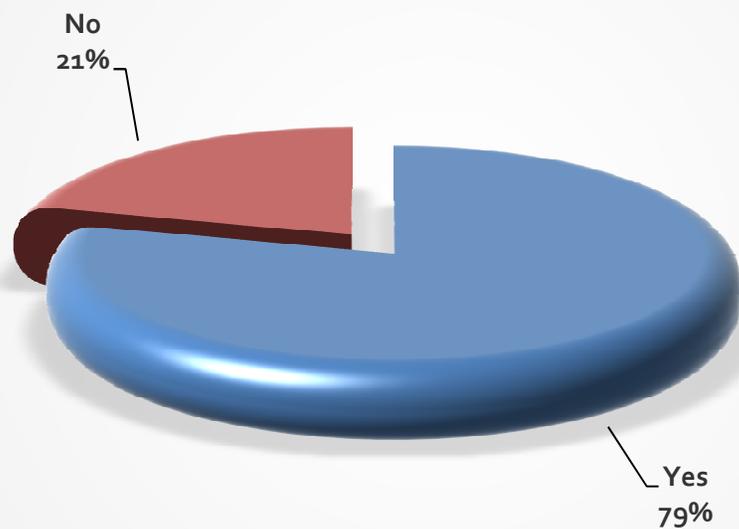
Can you please tell us how often do you use these channels for business communication (%)

Total sample.



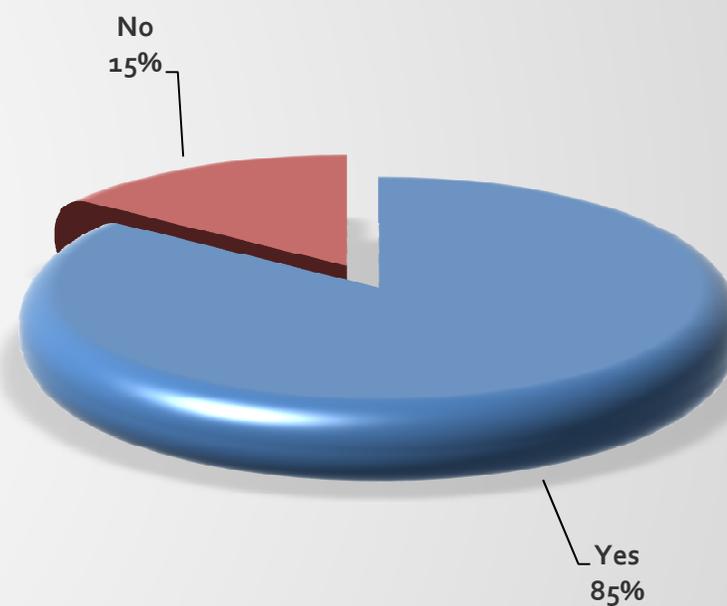
Does your company deliver bills to service users? (%)

Total sample.



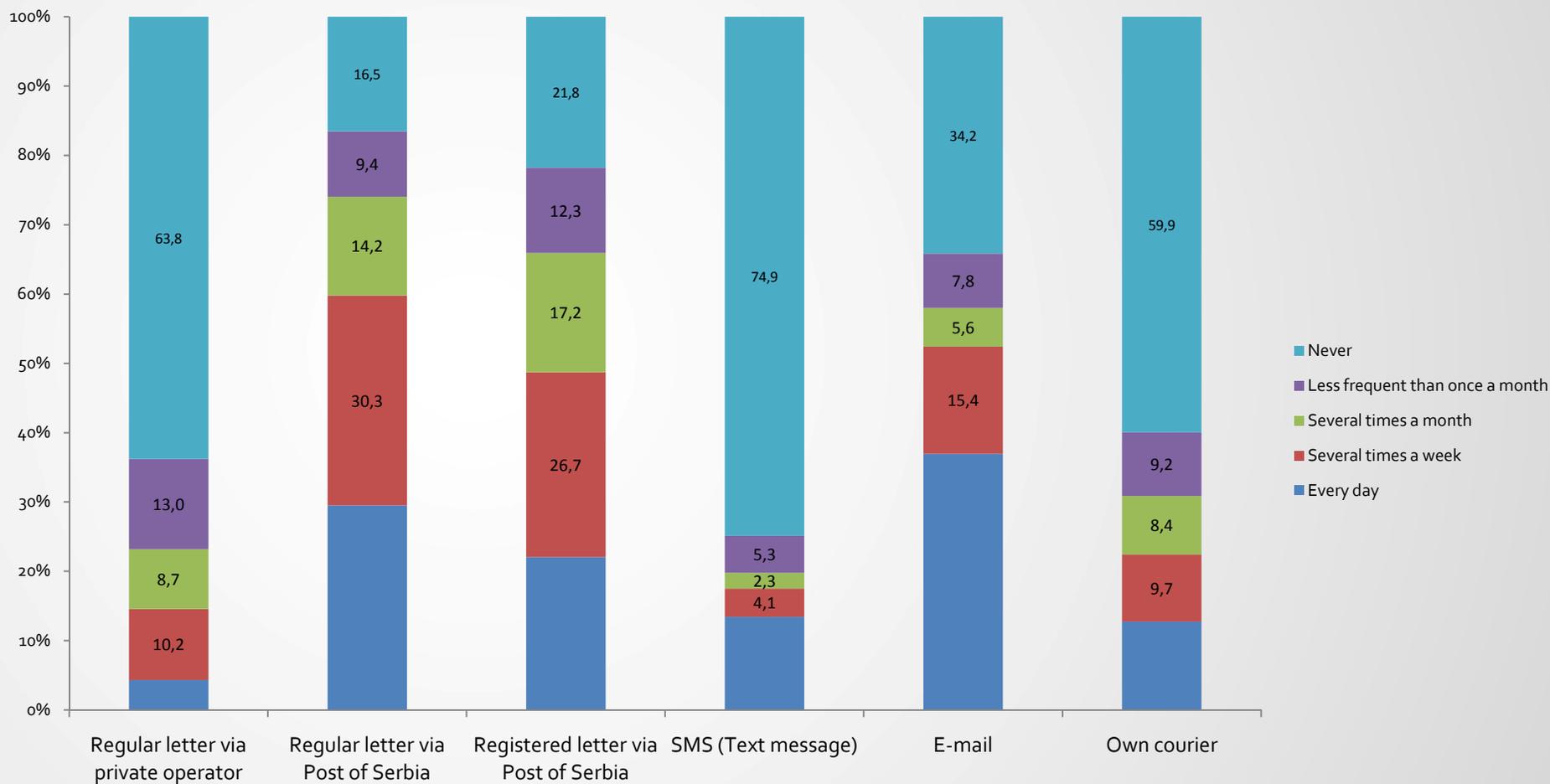
Does your company deliver bills to service users?

(subsample of large senders)



Can you please tell us how often do you send bills this way? (%)

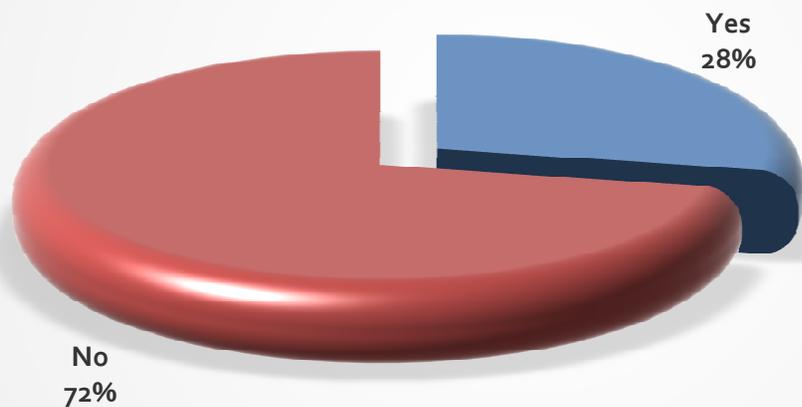
Subsample of 79.4% of companies who deliver bills to service users, shown to add up to 100%



Does your company use postal services for delivering sold goods?

(%)

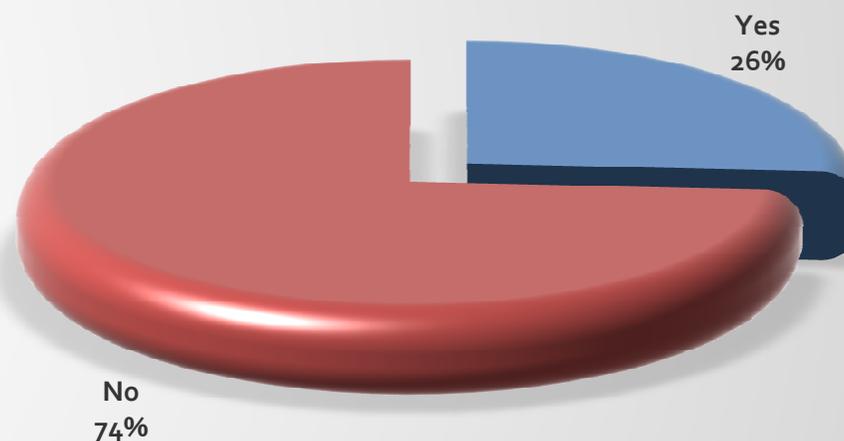
Total sample.



Does your company use postal services for delivering sold goods?

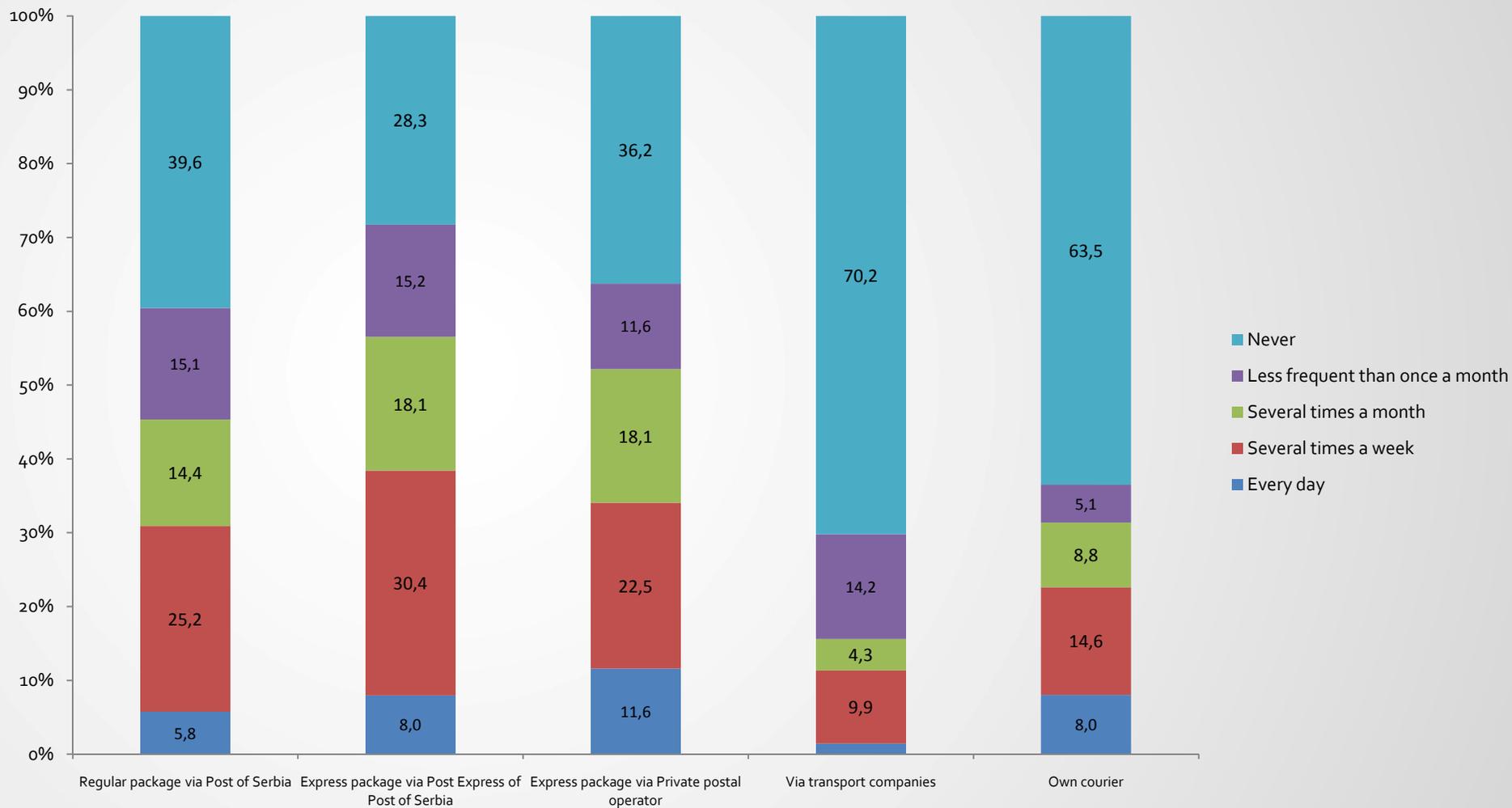
(%)

Sample of large senders



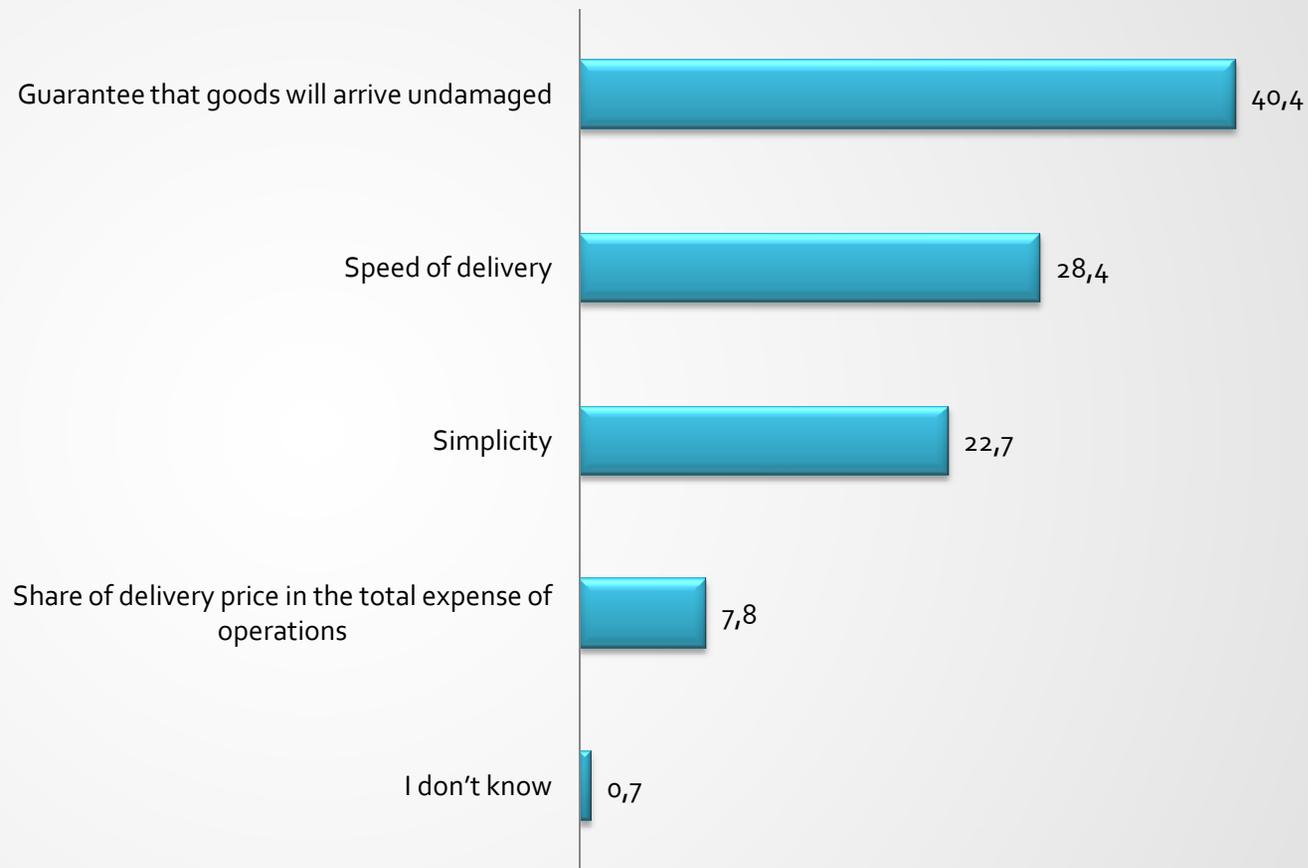
Can you please tell us how often do you use these ways of delivering goods? (%)

Subsample of 28.3% of companies that use postal services for delivering sold goods.



We choose the way of delivering goods based on:

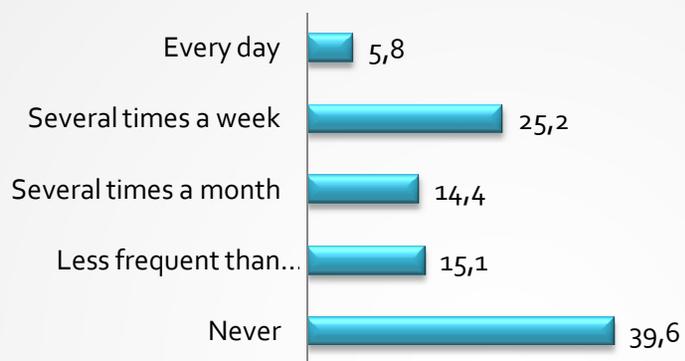
Subsample of companies that use postal services for delivering sold goods 28.3% (N=141)



Can you please tell us how often do you use these ways of delivering goods?

Subsample of companies that use postal services for delivering sold goods 28.3% (N=141)

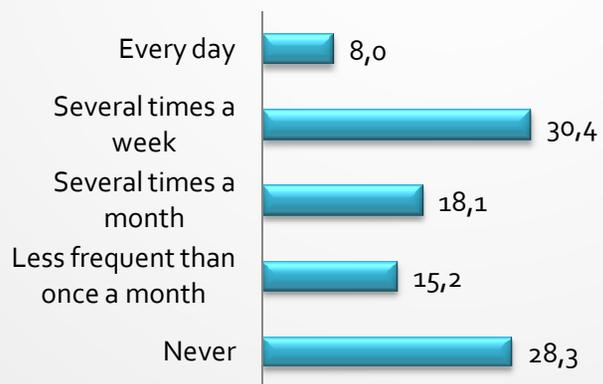
Regular package via Post of Serbia



Express package via Private postal operator



Express package via Post Express of Post of Serbia

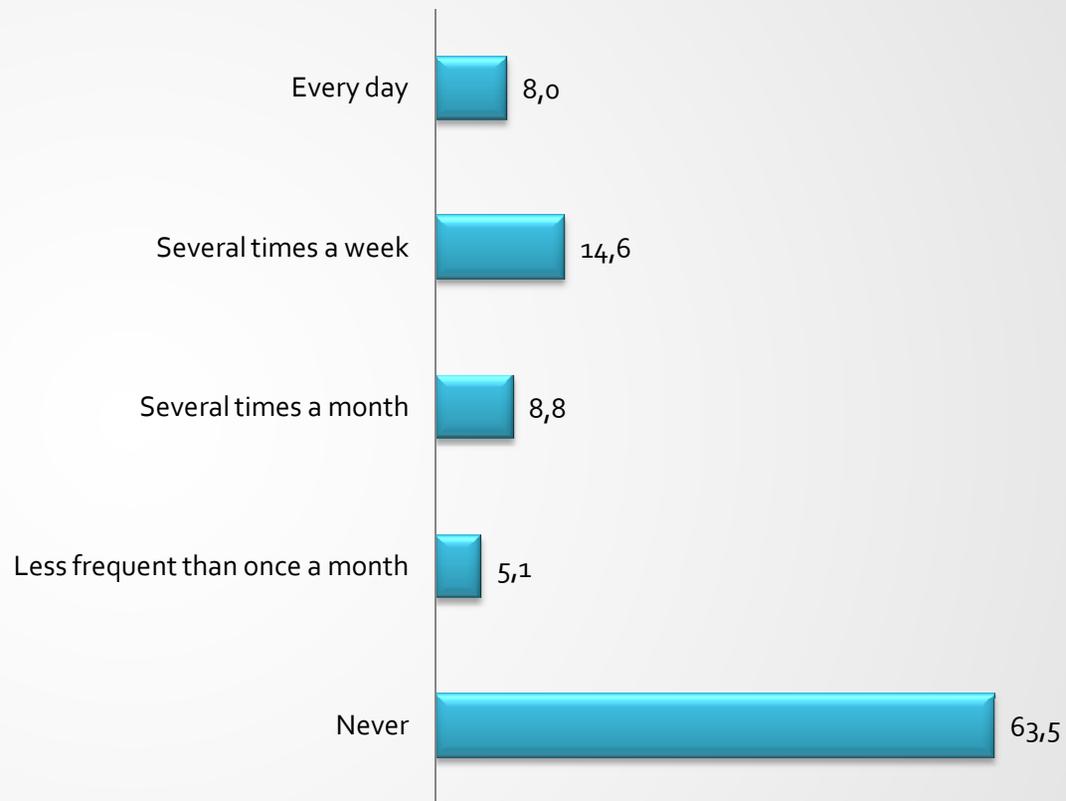


Via transport company



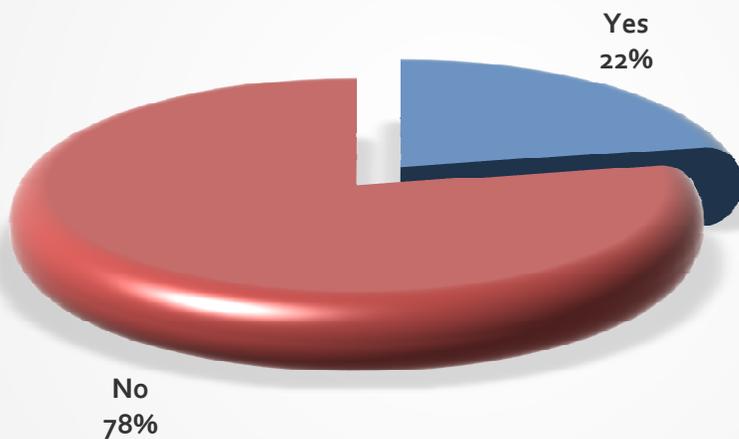
Can you please tell us how often do you use these ways of delivering goods?

Subsample of companies that use postal services for delivering sold goods 28.3% (N=141)



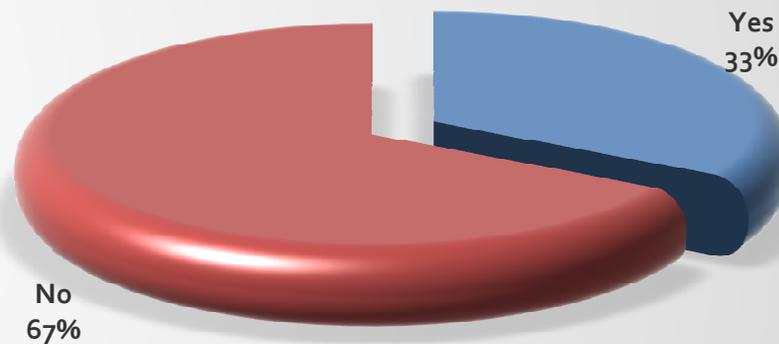
Does your company use services for distribution of advertising material (direct mail)? (%)

Total sample



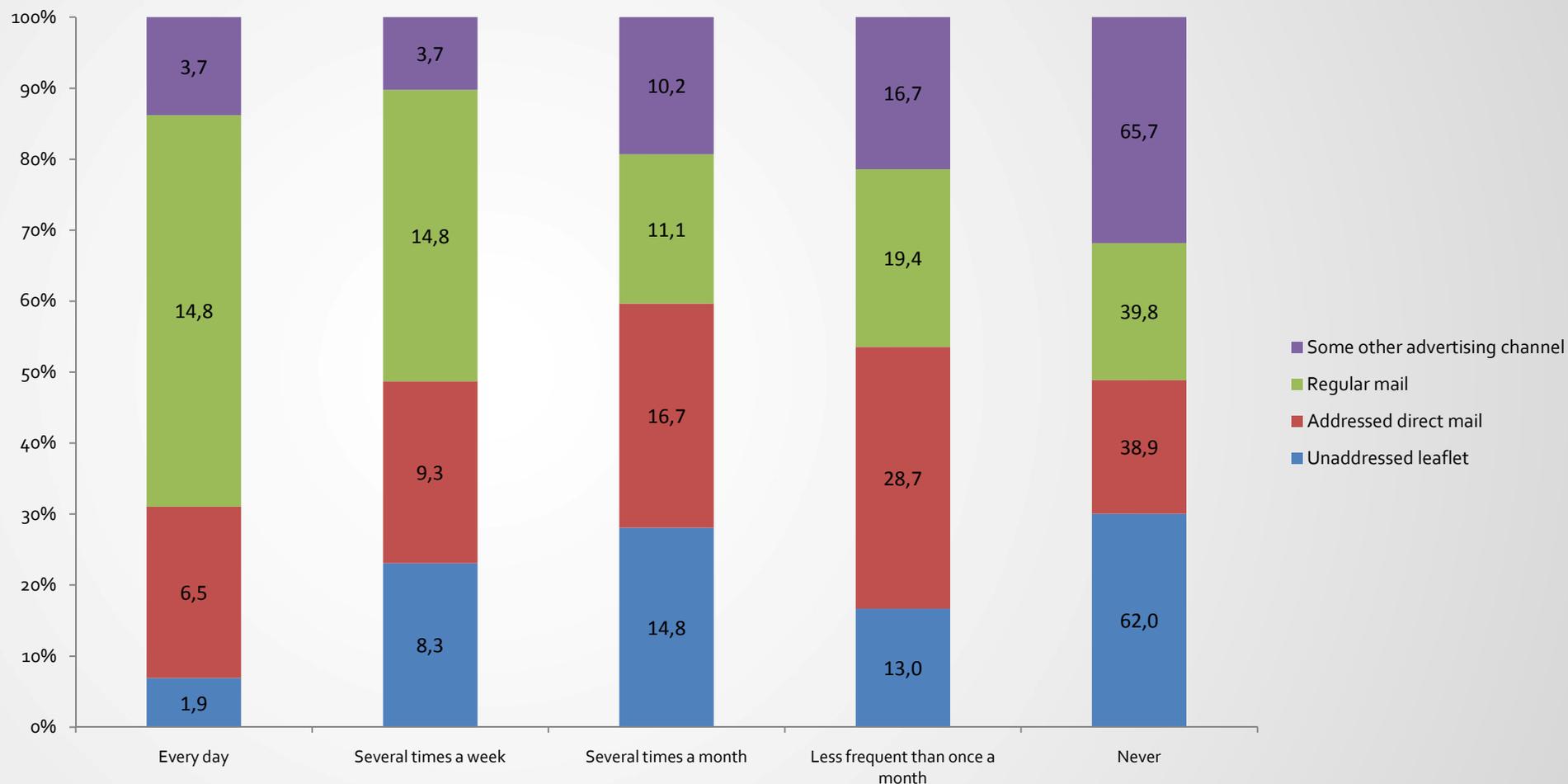
Does your company use services for distribution of advertising material (direct mail)?(%)

Sample of large senders



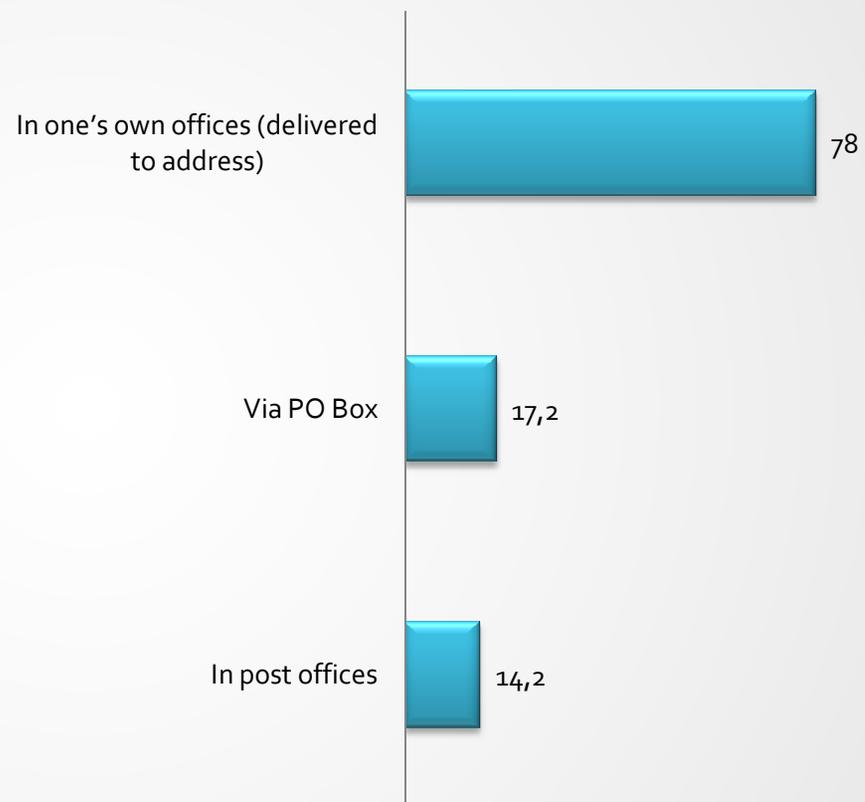
Can you please tell us how often do you use these advertising channels?

Subsample of 21.8% of legal entities that use postal services for distribution of advertising material.



How do you receive shipments? (%)

Several responses possible.



RECOGNIZABILITY OF POSTAL OPERATORS

- Private postal operators that respondents mention the most are AKS (36.5%) and DHL (35.6%). City Express ranks 3rd (16.5%).
- Post Express is the most frequently used postal operator, used by 45% of respondents, followed by AKS with 17.4% and City Express with 12%.
- The companies questioned have used services of DHL, AKS, City Express and Post Express of Post of Serbia at least once.

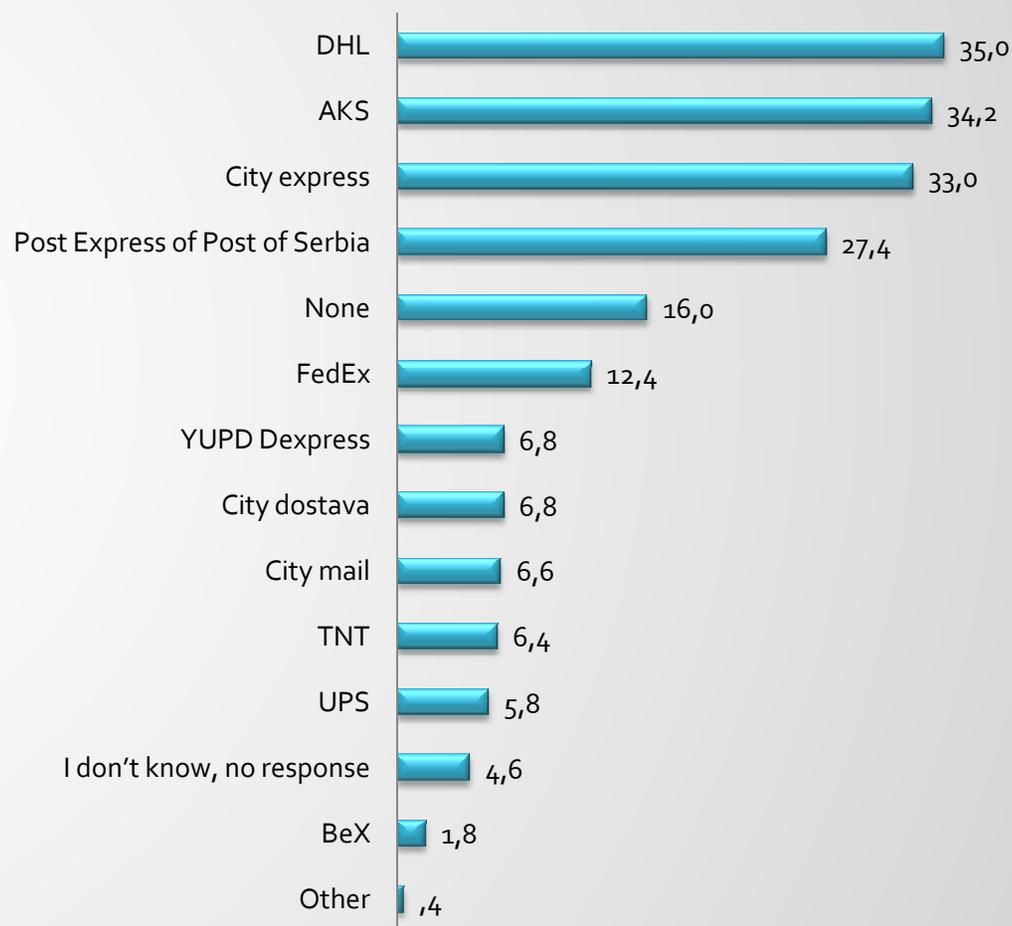
Can you tell me which postal operators' services have you used MOST OFTEN so far? (%)

Several answers possible.



Can you tell me which postal operators' services have you used AT LEAST ONCE? (%)

Several answers possible.



KNOWLEDGE OF UNIVERSAL POSTAL SERVICE

- Over 2 fifths of respondents think that the price of sending regular, registered or insured mail should depend on the distance a shipment is sent to, while over one third thinks that the price of sending should not depend on distance.
- Over one third of respondents thinks that letters, registered and insured letters can be sent by Post of Serbia and accredited distributors.

Who can perform the services of sending regular items, registered items and insured items up to 2kg, in internal transport according to the Law on postal services of Republic of Serbia? (%)

Total sample.



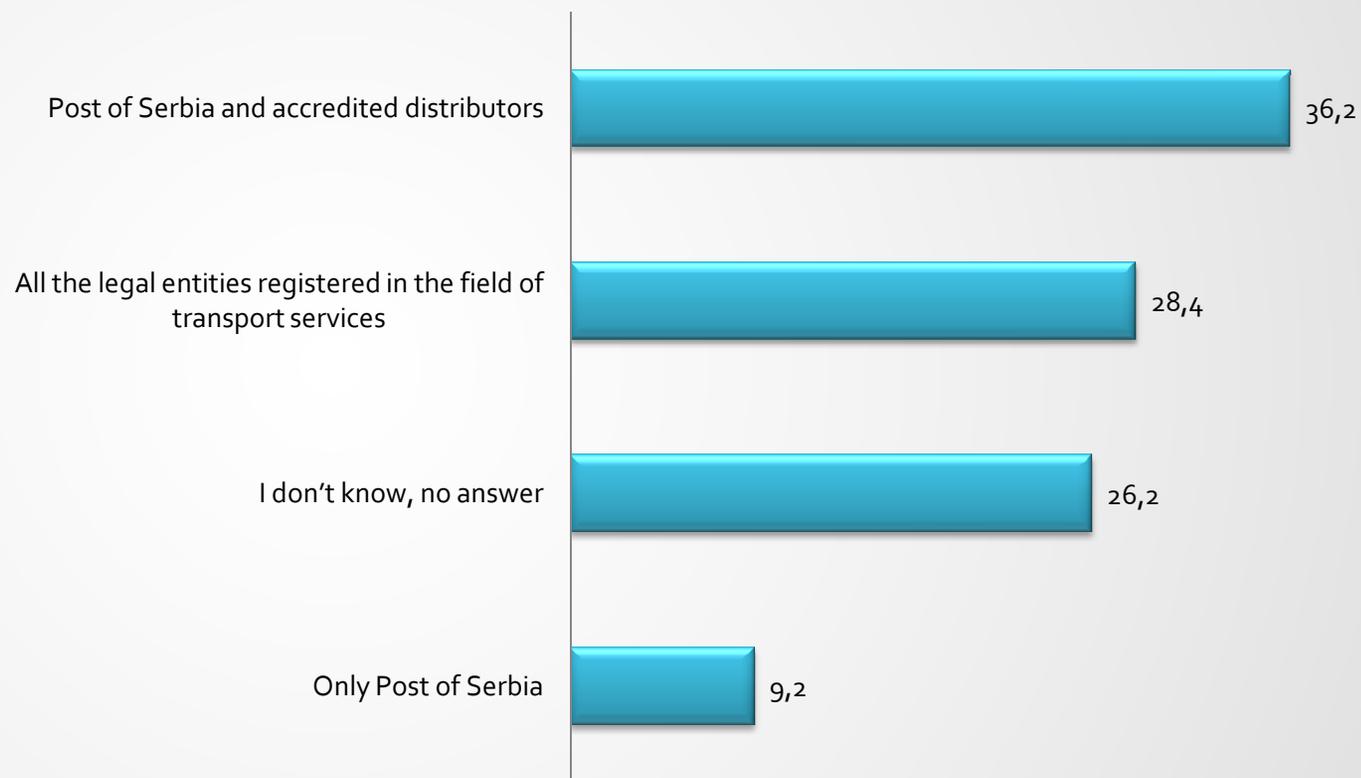
Who can perform the services of sending packages up to 10kg in internal transport according to the Law on postal services of Republic of Serbia? (%)

Total sample.

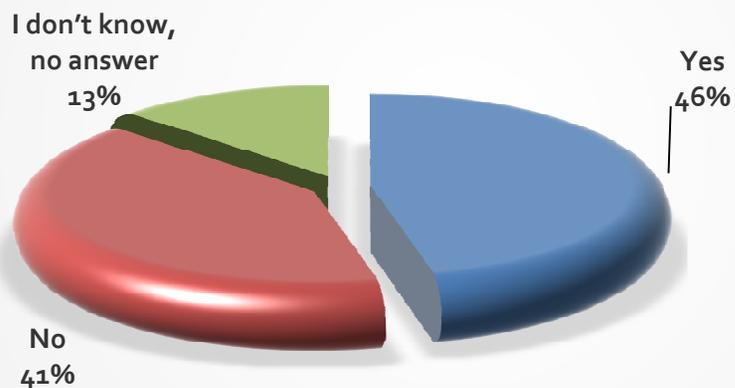


Who can perform the services of sending packages of 10 to 20kg in internal transport, according to the Law on postal services of Republic of Serbia? (%)

Total sample.

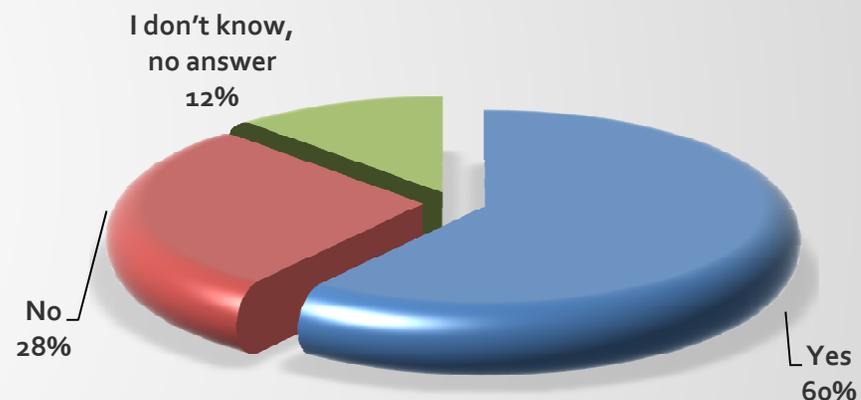


Does the company you work for have a signed contract with Post of Serbia?(%)



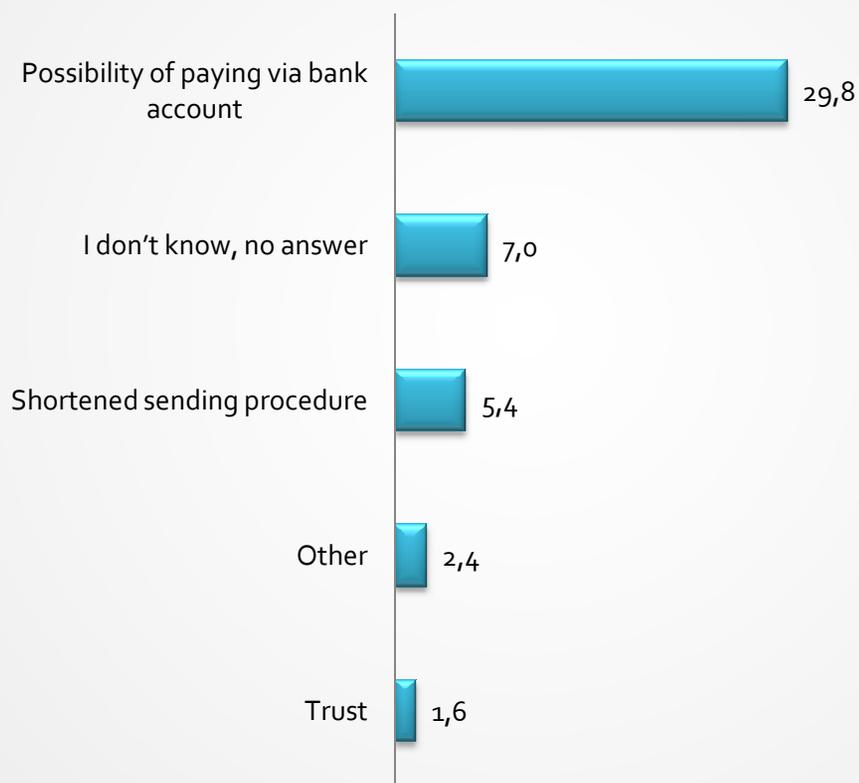
Does the company you work for have a signed contract with Post of Serbia?(%)

Subsample of large senders



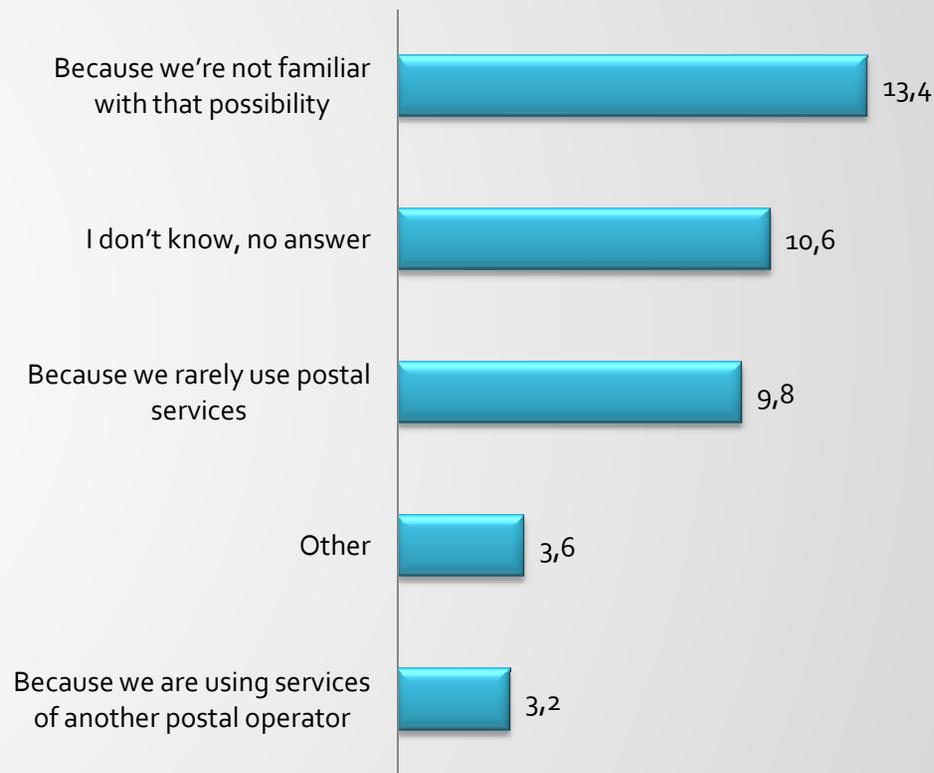
Can you tell me the reasons for signing the contract?(%)

Subsample of 46.2% of legal entities that have a signed contract with Post of Serbia.



Why do you not have a signed contract with Post of Serbia?(%)

Subsample of 40.6% of legal entities that don't have a signed contract with Post of Serbia.

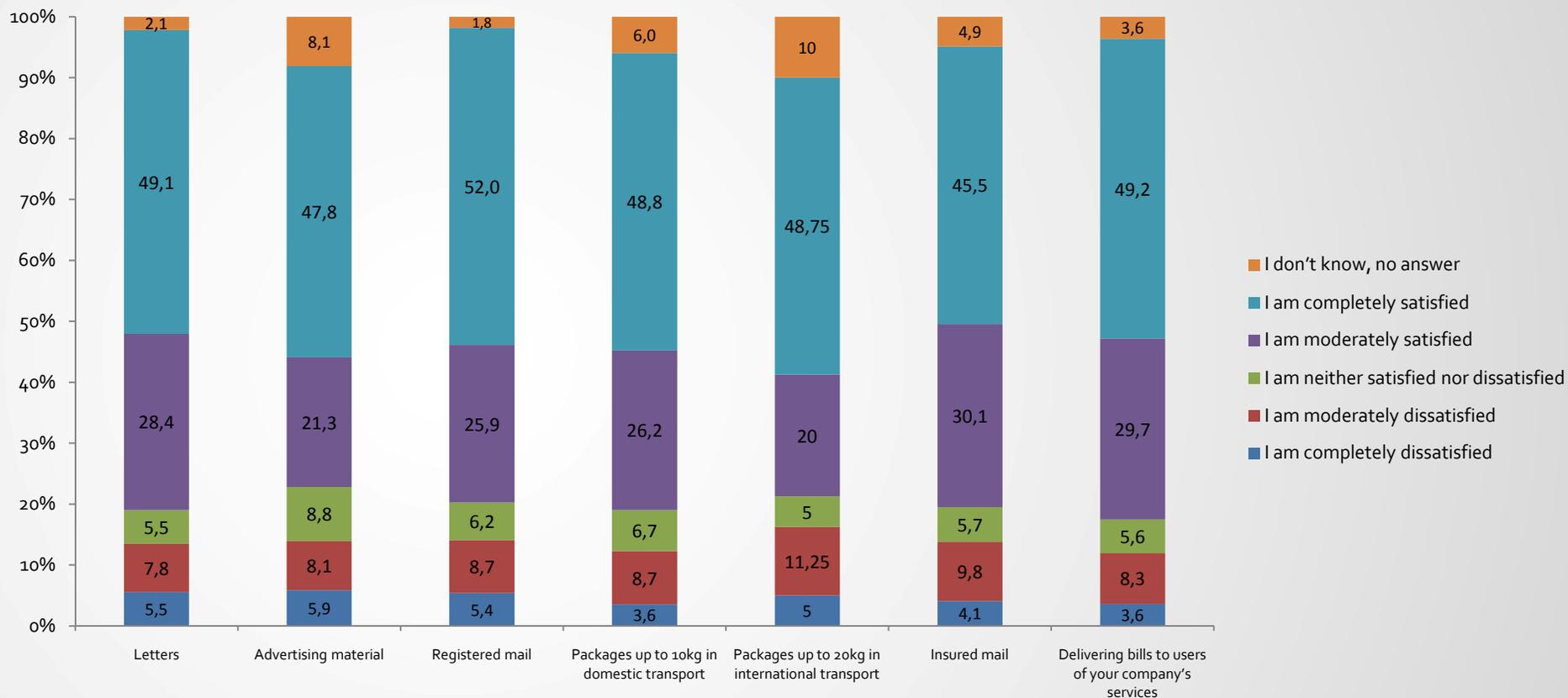


LEVEL OF SATISFACTION WITH POSTAL SERVICES

- Over 3 quarters of companies questioned are completely or moderately satisfied with services provided by Post of Serbia
- Late delivery is the reason most respondents mention as the most important cause of dissatisfaction for all types of postal services except for insured mail, where excessive price of shipment is mentioned as the main cause of dissatisfaction
- Most users who received some of the aforementioned types of shipments are pleased with the service

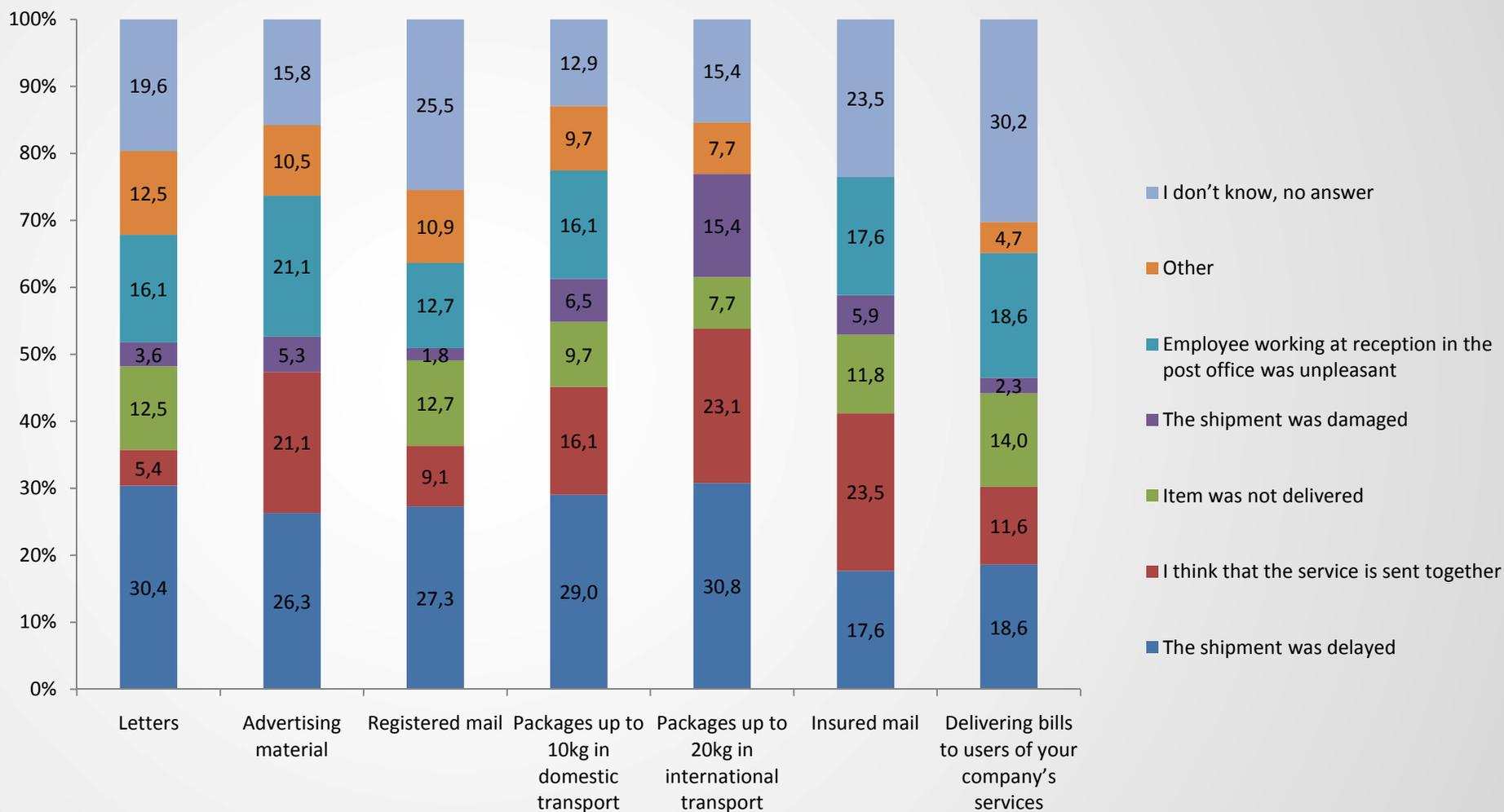
Can you tell me to what extent are you satisfied with the service offered by Post of Serbia when it comes to sending the following shipments?

Subsample of legal entities that send letters more frequently than once a year, shown to add up to 100%.

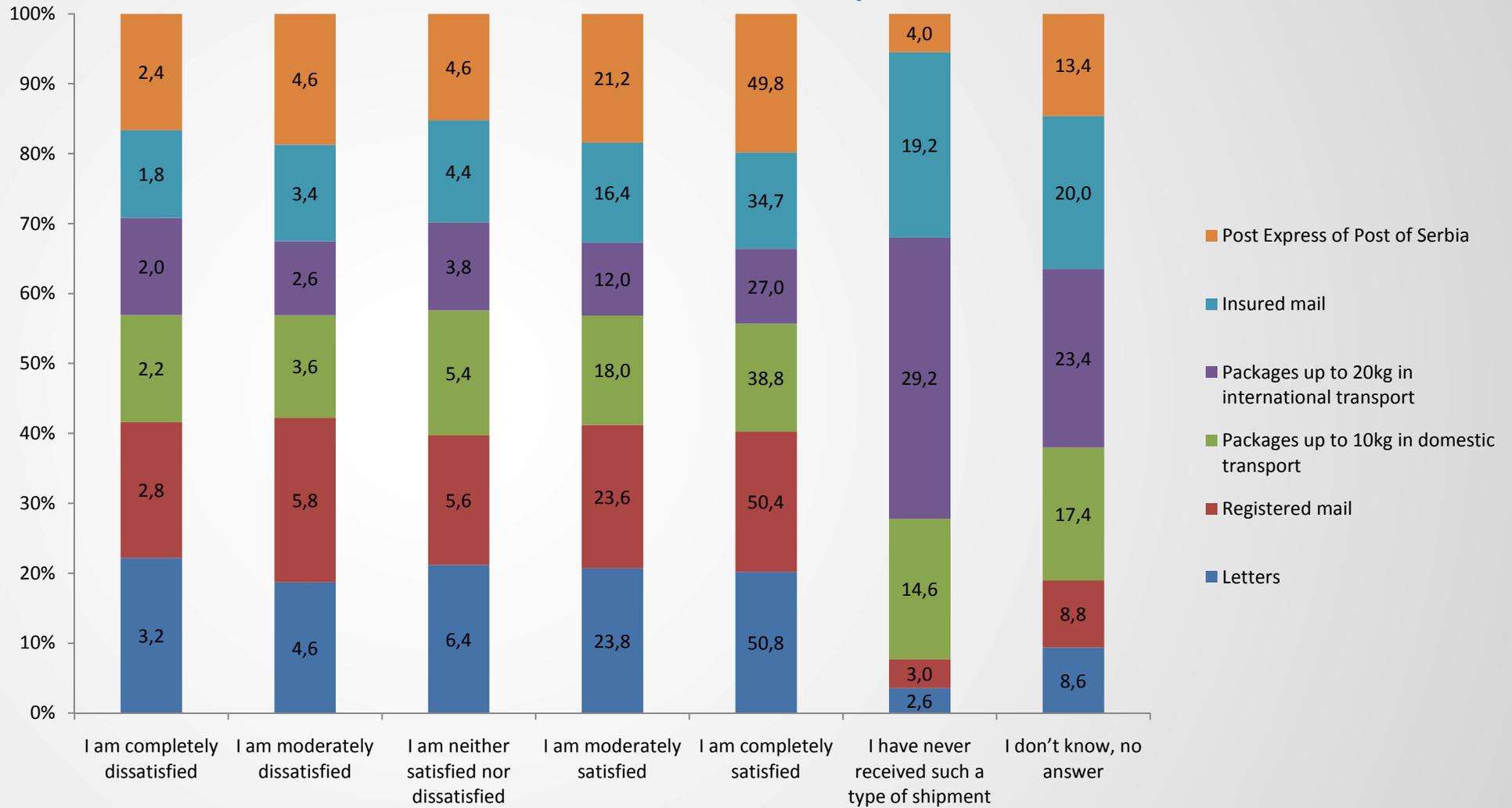


- No difference among groups of companies in the level of satisfaction with postal services when it comes to sending postal shipments – satisfaction with the service of sending shipments is uniform and not related to size of company, number of employees, income, ownership or place the company is located in.

Can you please tell me what contributed to dissatisfaction of your company when sending something (%)

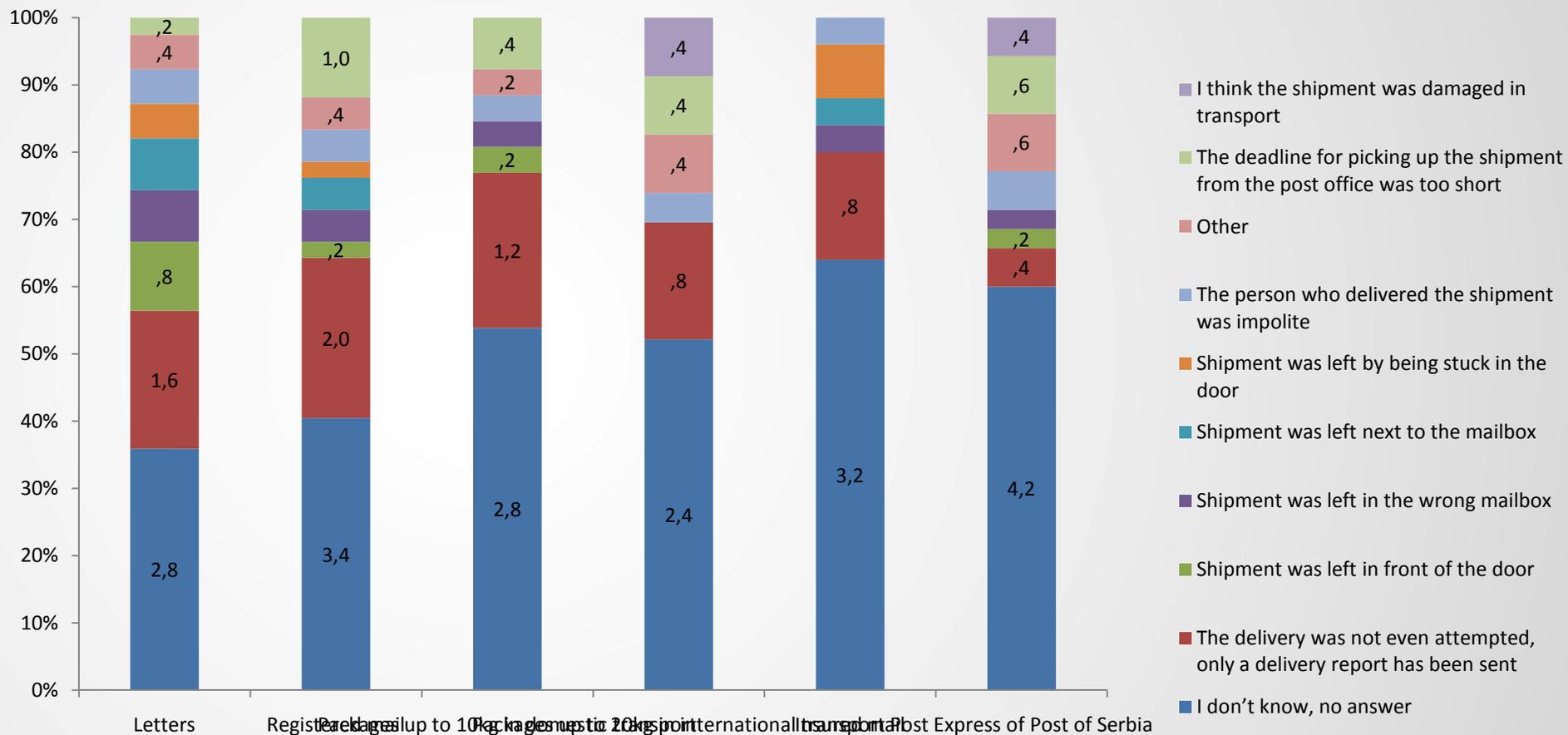


To what extent are you satisfied with the way a shipment has been delivered to you?



Why are you dissatisfied with the way a shipment was delivered to you?

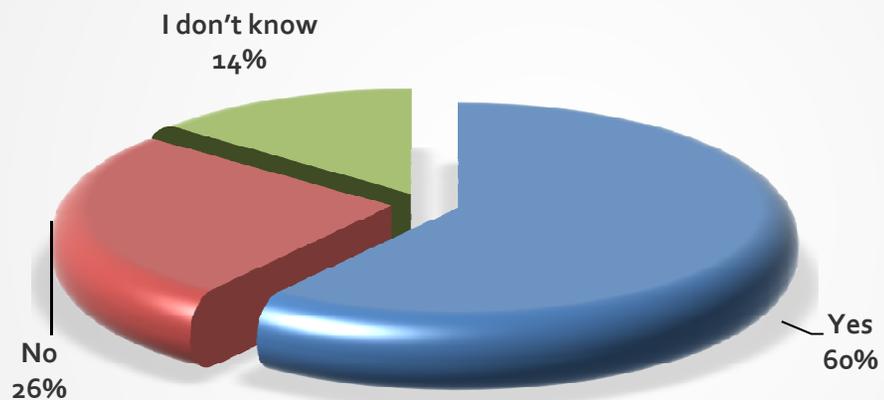
Subsample of legal entities that are dissatisfied with the way a shipment was delivered to them.



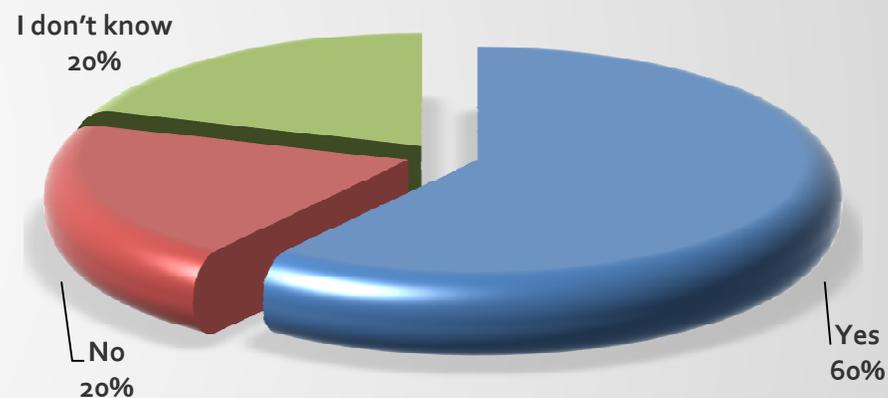
Prices of the universal service by service types are equal for the whole Republic of Serbia

Total sample

Regular mail up to 2 kg (%)



Registered mail up to 2 kg (%)

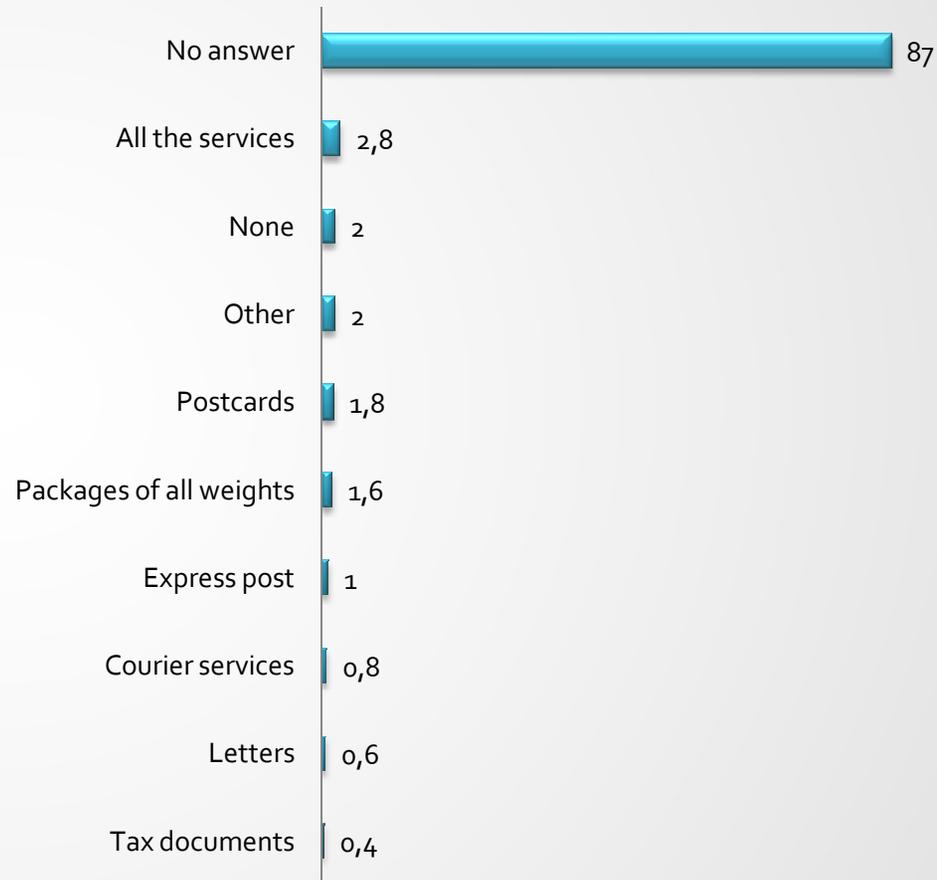


OPINION ABOUT UNIVERSAL SERVICE

- 60% of the companies questioned think that sending regular and registered mail should be a part of universal service
- 87% of respondents don't know which postal services should be performed in a way that their price is equal for the whole Serbia
- Most respondents are not familiar with the fact that there is a Republic Agency for Postal Services (83%).

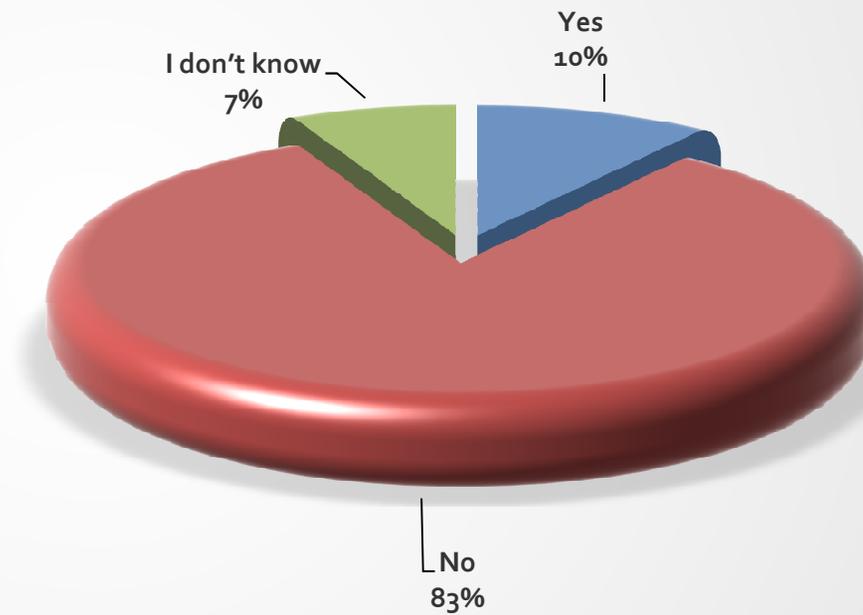
What other postal services do you think should be performed under these conditions (so that their price is equal in the whole Serbia)? (%)

Total sample

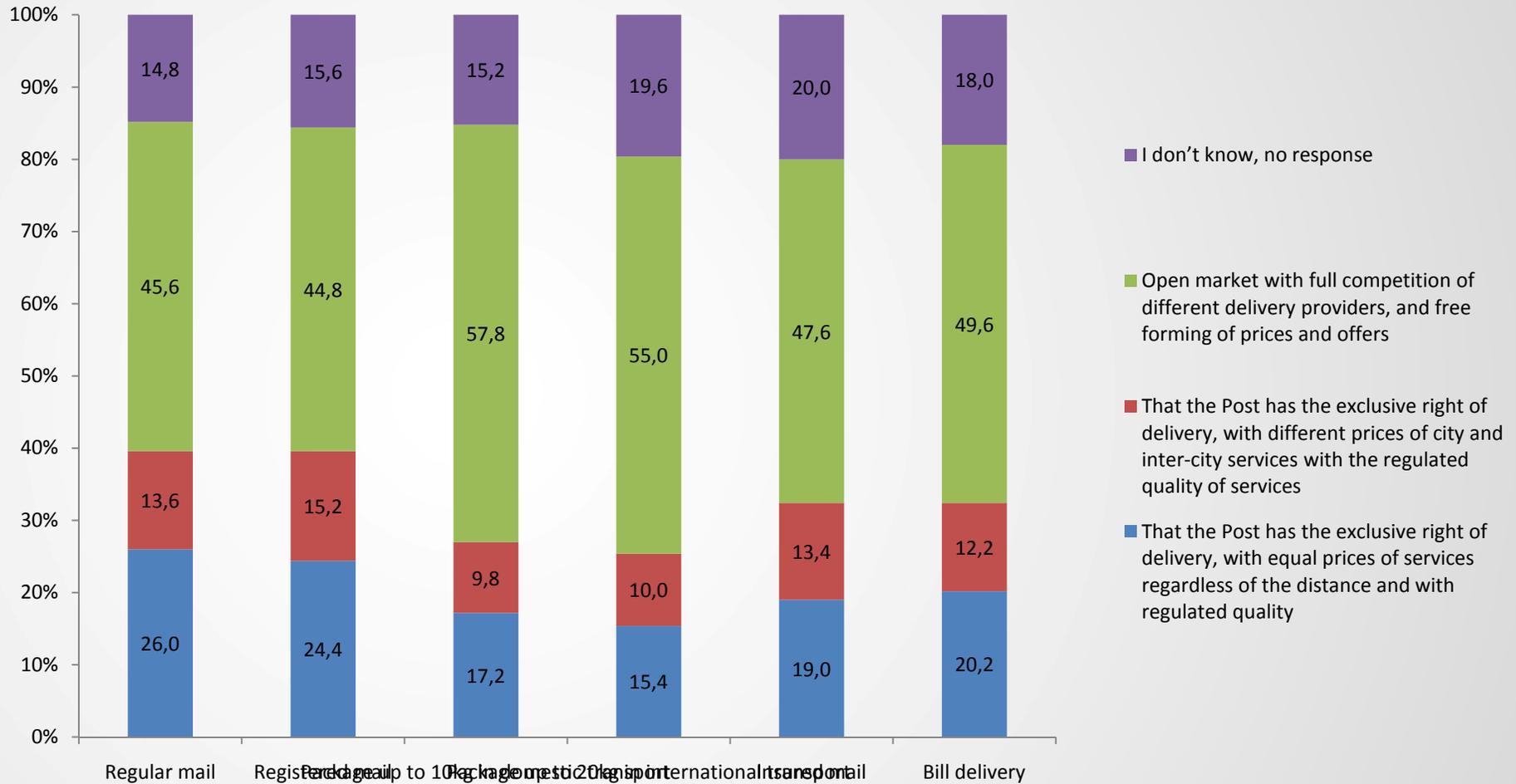


Are you familiar with the fact that the Republic Agency for Postal Services has been formed? (%)

Total sample



Which of the proposed models would best suit the needs of your company for sending each of the following shipments?



Thank you for your attention



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