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


- **Questionnaire**: made in cooperation with the client.
## COMPANY SAMPLE

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company size</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small</td>
<td>241</td>
<td>48,3</td>
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<tr>
<td>Medium</td>
<td>144</td>
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<td>Large</td>
<td>115</td>
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<td><strong>Number of employees</strong></td>
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<td></td>
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<tr>
<td>Up to 10</td>
<td>196</td>
<td>39,2</td>
</tr>
<tr>
<td>From 11 to 100</td>
<td>153</td>
<td>30,6</td>
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<tr>
<td>Over 100</td>
<td>151</td>
<td>30,2</td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>Private</td>
<td>422</td>
<td>84,4</td>
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<tr>
<td>State</td>
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<td>15,6</td>
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<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
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<tr>
<td>Less than 1 000 000 €</td>
<td>212</td>
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<tr>
<td>from 1 000 000 to 3 000 000 €</td>
<td>159</td>
<td>31,8</td>
</tr>
<tr>
<td>from 3 000 000 to 10 000 000 €</td>
<td>64</td>
<td>12,8</td>
</tr>
<tr>
<td>over 10 000 000 €</td>
<td>65</td>
<td>13,0</td>
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<tr>
<td><strong>Operations</strong></td>
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<td></td>
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<tr>
<td>Production</td>
<td>116</td>
<td>23,2</td>
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<tr>
<td>Trade</td>
<td>147</td>
<td>29,4</td>
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<tr>
<td>Other</td>
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<td>47,4</td>
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<tr>
<td><strong>Region</strong></td>
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<td></td>
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<tr>
<td>Vojvodina</td>
<td>143</td>
<td>28,8</td>
</tr>
<tr>
<td>Belgrade</td>
<td>149</td>
<td>29,8</td>
</tr>
<tr>
<td>East and South Serbia</td>
<td>85</td>
<td>16,9</td>
</tr>
<tr>
<td>Šumadija and West Serbia</td>
<td>123</td>
<td>24,5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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</tr>
</tbody>
</table>
# COMPANY SAMPLE – LARGE SENDERS

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company size</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small</td>
<td>84</td>
<td>36.1</td>
</tr>
<tr>
<td>Medium</td>
<td>76</td>
<td>32.6</td>
</tr>
<tr>
<td>Large</td>
<td>73</td>
<td>31.3</td>
</tr>
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<td><strong>Number of employees</strong></td>
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</tr>
<tr>
<td>From 11 to 100</td>
<td>68</td>
<td>29.2</td>
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<tr>
<td>Over 100</td>
<td>112</td>
<td>48.1</td>
</tr>
<tr>
<td><strong>Type of ownership</strong></td>
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<td></td>
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<tr>
<td>Private</td>
<td>178</td>
<td>76.4</td>
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<tr>
<td>State</td>
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<td>23.6</td>
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<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
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<tr>
<td>Less than 1 000 000 €</td>
<td>67</td>
<td>28.8</td>
</tr>
<tr>
<td>from 1 000 000 to 3 000 000 €</td>
<td>84</td>
<td>36.1</td>
</tr>
<tr>
<td>from 3 000 000 to 10 000 000 €</td>
<td>37</td>
<td>15.9</td>
</tr>
<tr>
<td>over 10 000 000 €</td>
<td>45</td>
<td>19.3</td>
</tr>
<tr>
<td><strong>Operations</strong></td>
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<td></td>
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<tr>
<td>Production</td>
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<td>23.2</td>
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<tr>
<td>Trade</td>
<td>52</td>
<td>22.3</td>
</tr>
<tr>
<td>Other</td>
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<td>54.5</td>
</tr>
<tr>
<td><strong>Region</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vojvodina</td>
<td>73</td>
<td>31.3</td>
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<tr>
<td>Belgrade</td>
<td>75</td>
<td>32.2</td>
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<tr>
<td>East and South Serbia</td>
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<td>14.2</td>
</tr>
<tr>
<td>Šumadija and West Serbia</td>
<td>52</td>
<td>22.3</td>
</tr>
<tr>
<td>Total</td>
<td>233</td>
<td>100.0</td>
</tr>
</tbody>
</table>
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.

- They are not important. 1,4
- They are neither important nor unimportant. 5,8
- They are important. 32,6
- They are very important. 60,2

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? (%)

- Yes 37%
- No 60%
- I don't know, I refuse to answer 3%

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?

- Yes 52%
- No 36%
- I don't know, I refuse to answer 12%
• 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.

- Delivery of bills to users of your company’s services
- Insured mail
- Express shipments
- Packages up to 20 kg in international transport
- Packages up to 10 kg in domestic transport
- Registered mail
- Advertising material
- Letters

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

- Letters: 70.6%
  - Within 10 days: 2.3%
  - Within 7 days: 3.3%
  - Within 5 days: 6.9%
  - Within 3 days: 2.2%
  - The next day: 2.2%
  - The same day: 2.3%
- Advertising material: 56.6%
  - Within 10 days: 3.3%
  - Within 7 days: 3.3%
  - Within 5 days: 6.9%
  - Within 3 days: 2.2%
  - The next day: 2.2%
  - The same day: 2.3%
- Registered mail: 77.1%
  - Within 10 days: 2.2%
  - Within 7 days: 2.2%
  - Within 5 days: 6.9%
  - Within 3 days: 2.2%
  - The next day: 2.2%
  - The same day: 2.3%
- Packages up to 10kg in domestic transport: 62.2%
  - Within 10 days: 2.2%
  - Within 7 days: 2.2%
  - Within 5 days: 6.9%
  - Within 3 days: 2.2%
  - The next day: 2.2%
  - The same day: 2.3%
- Packages up to 20kg in international transport: 39.8%
  - Within 10 days: 2.2%
  - Within 7 days: 2.2%
  - Within 5 days: 6.9%
  - Within 3 days: 2.2%
  - The next day: 2.2%
  - The same day: 2.3%
- Insured mail: 64.1%
  - Within 10 days: 7.1%
  - Within 7 days: 7.1%
  - Within 5 days: 7.1%
  - Within 3 days: 7.1%
  - The next day: 7.1%
  - The same day: 7.1%
- Delivery of bills to users of your company’s services: 69.7%
  - Within 10 days: 3.8%
  - Within 7 days: 3.8%
  - Within 5 days: 3.8%
  - Within 3 days: 3.8%
  - The next day: 3.8%
  - The same day: 3.8%
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.

<table>
<thead>
<tr>
<th></th>
<th>Letters</th>
<th>Advertising material</th>
<th>Registered mail</th>
<th>Packages up to 10kg in domestic transport</th>
<th>Packages up to 20kg in international transport</th>
<th>Express shipments</th>
<th>Insured items</th>
<th>Delivery of bills to users of your company’s services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aks</td>
<td>3,6</td>
<td>1,8</td>
<td>2,8</td>
<td>12,6</td>
<td>4,2</td>
<td>11,4</td>
<td>1,2</td>
<td>4,0</td>
</tr>
<tr>
<td>City Express</td>
<td>3,0</td>
<td>2,0</td>
<td>1,6</td>
<td>7,6</td>
<td>1,6</td>
<td>6,2</td>
<td>2</td>
<td>1,6</td>
</tr>
<tr>
<td>DHL</td>
<td>2,9</td>
<td>1,8</td>
<td>2,4</td>
<td>2,4</td>
<td>3,6</td>
<td>2,6</td>
<td>8</td>
<td>1,4</td>
</tr>
<tr>
<td>DMS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.4</td>
<td>.2</td>
<td>.2</td>
<td>.2</td>
</tr>
<tr>
<td>YUPD - Dexpers</td>
<td>1,9</td>
<td>.8</td>
<td>.4</td>
<td>3,6</td>
<td>.2</td>
<td>2,4</td>
<td>.2</td>
<td>1,4</td>
</tr>
<tr>
<td>Fedex</td>
<td>.8</td>
<td>.4</td>
<td>.6</td>
<td>1,4</td>
<td>.6</td>
<td>.4</td>
<td>.4</td>
<td>.4</td>
</tr>
<tr>
<td>Bex</td>
<td>.6</td>
<td>.2</td>
<td></td>
<td>2,2</td>
<td></td>
<td>2,2</td>
<td></td>
<td></td>
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<tr>
<td>City mail</td>
<td>.4</td>
<td>.8</td>
<td>.2</td>
<td></td>
<td></td>
<td>.2</td>
<td>.2</td>
<td>.6</td>
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<tr>
<td>City delivery</td>
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<td>.2</td>
<td>.6</td>
<td></td>
<td></td>
<td>.2</td>
<td>.2</td>
<td>.4</td>
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<td>TNT</td>
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<td></td>
<td>.4</td>
<td>.4</td>
<td></td>
<td></td>
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<tr>
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<td>.4</td>
<td>.6</td>
<td>.6</td>
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<tr>
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<td>.4</td>
<td>.2</td>
<td>1,8</td>
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<td>.6</td>
<td>.2</td>
<td>.6</td>
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<td>7,4</td>
<td>9,6</td>
<td>32,6</td>
<td>13,4</td>
<td>27,4</td>
<td>3,2</td>
<td>11,2</td>
</tr>
</tbody>
</table>
Can you please tell us how often do you use these channels for business communication (%)

Total sample.

- **Regular letter via private operator**: 29.7% (Never), 4.6% (Less frequent than once a month), 8.1% (Several times a month), 11.9% (Several times a week), 23.4% (Every day)
- **Regular letter via Post of Serbia**: 29.5% (Never), 14.5% (Less frequent than once a month), 13.3% (Several times a month), 60.9% (Several times a week), 60% (Every day)
- **Registered letter via Post of Serbia**: 15.5% (Never), 13.7% (Less frequent than once a month), 18.3% (Several times a month), 27.4% (Several times a week), 17.1% (Every day)
- **SMS (Text message)**: 13.3% (Never), 6.6% (Less frequent than once a month), 4.4% (Several times a month), 5.2% (Several times a week), 49.8% (Every day)
- **E-mail**: 14.3% (Never), 4.2% (Less frequent than once a month), 2.4% (Several times a month), 7.0% (Several times a week), 60.9% (Every day)
Does your company deliver bills to service users? (%)  
Total sample.

- No: 21%
- Yes: 79%

Does your company deliver bills to service users?  
(subsample of large senders)

- No: 15%
- Yes: 85%
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.

Yes 28%
No 72%

Does your company use postal services for delivering sold goods?

(%)  
Sample of large senders

Yes 26%
No 74%
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)

- Guarantee that goods will arrive undamaged: 40.4%
- Speed of delivery: 28.4%
- Simplicity: 22.7%
- Share of delivery price in the total expense of operations: 7.8%
- I don’t know: 0.7%
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)

<table>
<thead>
<tr>
<th>Method</th>
<th>Every day</th>
<th>Several times a week</th>
<th>Several times a month</th>
<th>Less frequent than once a month</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular package via Post of Serbia</td>
<td>5.8</td>
<td>25.2</td>
<td>14.4</td>
<td>15.1</td>
<td>39.6</td>
</tr>
<tr>
<td>Express package via Post Express of Post of Serbia</td>
<td>8.0</td>
<td>30.4</td>
<td>18.1</td>
<td>15.2</td>
<td>28.3</td>
</tr>
<tr>
<td>Express package via Private postal operator</td>
<td>11.6</td>
<td>22.5</td>
<td>18.1</td>
<td>11.6</td>
<td>6.2</td>
</tr>
<tr>
<td>Via transport company</td>
<td>1.4</td>
<td>9.9</td>
<td>4.3</td>
<td>14.2</td>
<td>70.2</td>
</tr>
</tbody>
</table>
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)

- Every day: 8.0%
- Several times a week: 14.6%
- Several times a month: 8.8%
- Less frequent than once a month: 5.1%
- Never: 63.5%
Does your company use services for distribution of advertising material (direct mail)? (%)

Total sample

Yes 22%
No 78%

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

Sample of large senders

Yes 33%
No 67%
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.

- In one's own offices (delivered to address): 78%
- Via PO Box: 17.2%
- In post offices: 14.2%
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.

- Post Express of Post of Serbia: 45.0%
- AKS: 17.4%
- City express: 12.0%
- DHL: 9.4%
- None: 5.0%
- I don’t know, no response: 4.8%
- YUPD Dexpress: 2.0%
- FedEx: 1.0%
- Other: 1.0%
- BeX: 1.0%
- City dostava: 0.8%
- City mail: 0.4%
- TNT: 0.2%

Can you tell me which postal operators’ services have you used AT LEAST ONCE? (%)  
Several answers possible.

- DHL: 35.0%
- AKS: 34.2%
- City express: 33.0%
- Post Express of Post of Serbia: 27.4%
- None: 16.0%
- FedEx: 12.4%
- YUPD Dexpress: 6.8%
- City dostava: 6.8%
- City mail: 6.6%
- TNT: 6.4%
- UPS: 5.8%
- I don’t know, no response: 4.6%
- BeX: 1.8%
- Other: 0.4%
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.

- Post of Serbia and accredited distributors: 36.0%
- All the legal entities registered in the field of transport services: 26.6%
- I don't know, no answer: 25.2%
- Only Post of Serbia: 12.2%

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.

- Post of Serbia and accredited distributors: 36.6%
- All the legal entities registered in the field of transport services: 29.6%
- I don't know, no answer: 25.4%
- Only Post of Serbia: 8.4%
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.

- Post of Serbia and accredited distributors: 36.2%
- All the legal entities registered in the field of transport services: 28.4%
- I don’t know, no answer: 26.2%
- Only Post of Serbia: 9.2%
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

- No 41%
- Yes 60%
- I don’t know, no answer 13%
- No answer 12%
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.

- Possibility of paying via bank account: 29.8%
- I don’t know, no answer: 7.0%
- Shortened sending procedure: 5.4%
- Other: 2.4%
- Trust: 1.6%

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.

- Because we’re not familiar with that possibility: 13.4%
- I don’t know, no answer: 10.6%
- Because we rarely use postal services: 9.8%
- Other: 3.6%
- Because we are using services of another postal operator: 3.2%
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 (%)

- I don’t know, no answer
- Other
- Employee working at reception in the post office was unpleasant
- The shipment was damaged
- Item was not delivered
- I think that the service is sent together
- The shipment was delayed

<table>
<thead>
<tr>
<th>Service</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letters</td>
<td>30.4</td>
<td>26.3</td>
<td>27.3</td>
<td>29.0</td>
<td>30.8</td>
<td>17.6</td>
<td>18.6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising material</td>
<td>19.6</td>
<td>15.8</td>
<td>25.5</td>
<td>12.9</td>
<td>15.4</td>
<td>23.5</td>
<td>30.2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered mail</td>
<td>16.1</td>
<td>21.1</td>
<td>12.7</td>
<td>6.5</td>
<td>7.7</td>
<td>5.9</td>
<td>18.6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Packages up to 10kg in domestic transport</td>
<td>9.7</td>
<td>10.9</td>
<td>12.7</td>
<td>16.1</td>
<td>7.7</td>
<td>11.8</td>
<td>14.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Packages up to 20kg in international transport</td>
<td>4.7</td>
<td>5.3</td>
<td>1.8</td>
<td>9.1</td>
<td>7.7</td>
<td>11.8</td>
<td>14.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insured mail</td>
<td>3.6</td>
<td>1.8</td>
<td>9.1</td>
<td>16.1</td>
<td>23.1</td>
<td>23.5</td>
<td>11.6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivering bills to users of your company’s services</td>
<td>5.4</td>
<td>21.1</td>
<td>9.1</td>
<td>16.1</td>
<td>23.1</td>
<td>23.5</td>
<td>11.6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To what extent are you satisfied with the way a shipment has been delivered to you?

- I am completely dissatisfied
- I am moderately dissatisfied
- I am neither satisfied nor dissatisfied
- I am moderately satisfied
- I am completely satisfied
- I have never received such a type of shipment
- I don’t know, no answer

Post Express of Post of Serbia
Insured mail
Packages up to 20kg in international transport
Packages up to 10kg in domestic transport
Registered mail
Letters
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.

- I think the shipment was damaged in transport
- The deadline for picking up the shipment from the post office was too short
- Other
- The person who delivered the shipment was impolite
- Shipment was left by being stuck in the door
- Shipment was left next to the mailbox
- Shipment was left in the wrong mailbox
- Shipment was left in front of the door
- The delivery was not even attempted, only a delivery report has been sent
- I don't know, no answer
Prices of the universal service by service types are equal for the whole Republic of Serbia

Total sample

Regular mail up to 2 kg (%)

- Yes: 60%
- No: 26%
- I don’t know: 14%

Registered mail up to 2 kg (%)

- Yes: 60%
- No: 20%
- I don’t know: 20%
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)? (%)

<table>
<thead>
<tr>
<th>Service</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>No answer</td>
<td>87</td>
</tr>
<tr>
<td>All the services</td>
<td>2,8</td>
</tr>
<tr>
<td>None</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
</tr>
<tr>
<td>Postcards</td>
<td>1,8</td>
</tr>
<tr>
<td>Packages of all weights</td>
<td>1,6</td>
</tr>
<tr>
<td>Express post</td>
<td>1</td>
</tr>
<tr>
<td>Courier services</td>
<td>0,8</td>
</tr>
<tr>
<td>Letters</td>
<td>0,6</td>
</tr>
<tr>
<td>Tax documents</td>
<td>0,4</td>
</tr>
</tbody>
</table>
Are you familiar with the fact that the Republic Agency for Postal Services has been formed? (%) Total sample

- Yes: 10%
- I don't know: 7%
- No: 83%
Which of the proposed models would best suit the needs of your company for sending each of the following shipments?

- Regular mail
- Registered mail
- Package up to 10 kg in domestic transport
- Package up to 20 kg in international transport
- Insured mail
- Bill delivery

Options:
- I don’t know, no response
- Open market with full competition of different delivery providers, and free forming of prices and offers
- That the Post has the exclusive right of delivery, with different prices of city and inter-city services with the regulated quality of services
- That the Post has the exclusive right of delivery, with equal prices of services regardless of the distance and with regulated quality
Thank you for your attention