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

- Natural entities -
**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

<table>
<thead>
<tr>
<th>Feature</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>553</td>
<td>46.1</td>
</tr>
<tr>
<td>Female</td>
<td>646</td>
<td>53.9</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-29</td>
<td>252</td>
<td>21.0</td>
</tr>
<tr>
<td>30-44</td>
<td>290</td>
<td>24.2</td>
</tr>
<tr>
<td>45-59</td>
<td>301</td>
<td>25.1</td>
</tr>
<tr>
<td>60+</td>
<td>356</td>
<td>29.7</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No school, unfinished primary school, primary school</td>
<td>302</td>
<td>25.2</td>
</tr>
<tr>
<td>3-year or 2-year high school</td>
<td>249</td>
<td>20.8</td>
</tr>
<tr>
<td>4-year high school, grammar school, specialization</td>
<td>414</td>
<td>34.5</td>
</tr>
<tr>
<td>Faculty+</td>
<td>235</td>
<td>19.6</td>
</tr>
<tr>
<td><strong>Type of settlement</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>646</td>
<td>53.9</td>
</tr>
<tr>
<td>Suburban</td>
<td>553</td>
<td>46.1</td>
</tr>
<tr>
<td><strong>Region</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vojvodina</td>
<td>320</td>
<td>26.7</td>
</tr>
<tr>
<td>Belgrade</td>
<td>277</td>
<td>23.1</td>
</tr>
<tr>
<td>Šumadija and West Serbia</td>
<td>394</td>
<td>32.8</td>
</tr>
<tr>
<td>South and East Serbia</td>
<td>208</td>
<td>17.4</td>
</tr>
<tr>
<td><strong>Employment Status</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td>534</td>
<td>44.5</td>
</tr>
<tr>
<td>Unemployed</td>
<td>305</td>
<td>25.4</td>
</tr>
<tr>
<td>Pensioner</td>
<td>299</td>
<td>25.0</td>
</tr>
<tr>
<td>I don’t want to respond*</td>
<td>61</td>
<td>5.1</td>
</tr>
</tbody>
</table>
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:

- Speed of delivery (time it takes for a shipment to arrive to the destination):
  - It doesn’t matter at all: 66.8%
  - It mostly matters: 24.0%
  - It is very important: 21.5%
  - I don’t know, no answer: 18.1%
  - It mostly doesn’t matter: 23.8%
  - It does and doesn’t matter: 20.8%
  - It mostly matters: 20.0%
  - I mostly doesn’t matter: 50%

- Trust that the shipment will arrive undamaged:
  - It doesn’t matter at all: 74.1%
  - It mostly matters: 64.5%
  - It mostly doesn’t matter: 64.3%
  - It does and doesn’t matter: 70.0%
  - It mostly matters: 62.1%
  - It mostly doesn’t matter: 50%

- Simplicity of sending:
  - It mostly matters: 66.8%
  - It mostly doesn’t matter: 24.0%
  - It mostly matters: 21.5%
  - It does and doesn’t matter: 18.1%
  - It mostly doesn’t matter: 23.8%
  - It does and doesn’t matter: 20.8%
  - It mostly matters: 20.0%
  - It mostly matters: 50%

- Politeness of staff working on reception and delivery of mail:
  - It mostly matters: 66.8%
  - It mostly doesn’t matter: 24.0%
  - It mostly matters: 21.5%
  - It does and doesn’t matter: 18.1%
  - It mostly doesn’t matter: 23.8%
  - It does and doesn’t matter: 20.8%
  - It mostly matters: 20.0%
  - It mostly matters: 50%

- Price of service:
  - It mostly matters: 66.8%
  - It mostly doesn’t matter: 24.0%
  - It mostly matters: 21.5%
  - It does and doesn’t matter: 18.1%
  - It mostly doesn’t matter: 23.8%
  - It does and doesn’t matter: 20.8%
  - It mostly matters: 20.0%
  - It mostly matters: 50%

- Flexibility (readiness to meet a specific need):
  - It mostly matters: 66.8%
  - It mostly doesn’t matter: 24.0%
  - It mostly matters: 21.5%
  - It does and doesn’t matter: 18.1%
  - It mostly doesn’t matter: 23.8%
  - It does and doesn’t matter: 20.8%
  - It mostly matters: 20.0%
  - It mostly matters: 50%
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?

- Sending letters
- Sending postcards
- Registered mail
- Sending packages up to 10kg in domestic transport
- Sending packages up to 20kg in foreign transport
- Express shipments (for the same day or for the next day)
- Insured mail
- Money sending
- Payment operations on current accounts
- Paying of bills

- I don't know, no answer
- Never
- Less often than once a year
- Several times a year
- Once a year
- At least once a month
- Several times month
- Once a week
- Several times a week
- Once a day
- Several times a day
How do you send shipments?

- Letters: 34.8%
- Postcards: 37.7%
- Registered mail: 39.8%
- Packages up to 10kg in domestic transport: 50.6%
- Packages up to 20kg in foreign transport (for the same day or for the next day): 69.8%
- Express shipments (for the same day or for the next day): 40.8%
- Money sending: 42.2%
- Insured mail: 57.0%
- Cash: 57.5%

Options:
- I don’t use that service
- I don’t know, no answer
- Some other way
- Private express delivery services
- TAXI transporters
- Bus drivers
- Acquaintances, friends
- Post Express of Post of Serbia
- Post of Serbia
How do you most often send:

- **Letters**: 67.3%
- **Postcards**: 63.9%
- **Registered mail**: 58.1%
- **Packages up to 10kg in domestic transport**: 28.4%
- **Packages up to 20kg in foreign transport**: 63.4%
- **Express shipments**: 34.3%
- **Money sending**: 46.1%
- **Insured mail**: 37.3%

- **Bank**: 57.3%
- **I don't use that service**: 33.4%
- **TAXI transporters**: 34.5%
- **Bus drivers**: 11.1%
- **Private express delivery services**: 5.7%
- **Acquaintances, friends**: 5.0%
- **Other**: 5.3%
- **Post Express of Post of Serbia**: 45.3%
- **I don't know**: 22.7%
- **Post of Serbia**: 34.3%
- **Other**: 22.1%
- **I don't know**: 8.1%
- **I don't use that service**: 7.1%
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)?

Yes 26%

No, I don't use remote shopping 74%

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).

- Simplicity: 8.3%
- Speed of delivery: 8.0%
- Price: 6.5%
- Guarantee that goods will arrive undamaged: 3.4%

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

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Regular package via Post of Serbia</th>
<th>Regular package via Post Express of Post of Serbia</th>
<th>Regular package via Private postal operator</th>
<th>Via air transporter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>1.2</td>
<td>1.2</td>
<td>1.1</td>
<td>1.2</td>
</tr>
<tr>
<td>Several times a week</td>
<td>1.6</td>
<td>1.6</td>
<td>1.2</td>
<td>1.3</td>
</tr>
<tr>
<td>Several times a month</td>
<td>1.8</td>
<td>3.3</td>
<td>2.0</td>
<td>1.9</td>
</tr>
<tr>
<td>Less frequent than once a month</td>
<td>15.8</td>
<td>15.8</td>
<td>10.3</td>
<td>6.1</td>
</tr>
<tr>
<td>I don't use remote shopping</td>
<td>7.7</td>
<td>6.3</td>
<td>13.6</td>
<td>18.7</td>
</tr>
<tr>
<td>Total</td>
<td>26.2</td>
<td>26.2</td>
<td>26.2</td>
<td>26.2</td>
</tr>
</tbody>
</table>
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:

- I don't know: 17%
- I doesn't have to depend on the distance of the location it is sent to: 36%
- It has to depend on the distance of the location it is sent to: 47%

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

- I don't know: 19%
- I doesn't have to depend on the distance of the location it is sent to: 30%
- It has to depend on the distance of the location it is sent to: 51%

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.

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.

- Reception and sending of letters: 85.1%
- Reception of bills (electricity, phone, utilities): 84.1%
- Reception of salaries or pensions: 71.5%
- Reception of postcards: 70.7%
- Reception and sending of packages: 65.8%
- Reception and sending of telegrams: 50.0%
- Reception and sending of money orders (sending money to private entities): 42.8%
- Paying money to a bank account: 41.3%
- Service of making phone calls from a post office: 27.2%
- Other: 1.2%
- I don't know: 0.6%
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?

<table>
<thead>
<tr>
<th>Service</th>
<th>I don't know</th>
<th>I never sent this type of shipment before</th>
<th>I am completely satisfied</th>
<th>I am moderately satisfied</th>
<th>I am neither satisfied nor dissatisfied</th>
<th>I am moderately dissatisfied</th>
<th>I am completely dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending letters</td>
<td>6.0%</td>
<td>6.7%</td>
<td>6.7%</td>
<td>8.6%</td>
<td>10.3%</td>
<td>4.5%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Sending postcards</td>
<td>22.6%</td>
<td>25.8%</td>
<td>31.7%</td>
<td>46.0%</td>
<td>64.0%</td>
<td>36.0%</td>
<td>55.1%</td>
</tr>
<tr>
<td>Sending registered mail</td>
<td>42.4%</td>
<td>40.2%</td>
<td>34.7%</td>
<td>22.6%</td>
<td>64.0%</td>
<td>36.0%</td>
<td>32.1%</td>
</tr>
<tr>
<td>Sending packages up to 10kg in domestic transport</td>
<td>18.2%</td>
<td>17.9%</td>
<td>17.0%</td>
<td>13.5%</td>
<td>12.5%</td>
<td>15.3%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Sending packages up to 10kg in foreign transport</td>
<td>6.3%</td>
<td>6.8%</td>
<td>7.0%</td>
<td>8.2%</td>
<td>8.2%</td>
<td>10.0%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Express shipments of Post of Serbia</td>
<td>7.2%</td>
<td>6.3%</td>
<td>6.8%</td>
<td>7.0%</td>
<td>5.9%</td>
<td>7.3%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Paying of bills</td>
<td>6.0%</td>
<td>6.7%</td>
<td>6.7%</td>
<td>8.6%</td>
<td>10.3%</td>
<td>4.5%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Money sending</td>
<td>50%</td>
<td>60%</td>
<td>70%</td>
<td>80%</td>
<td>90%</td>
<td>100%</td>
<td>50%</td>
</tr>
<tr>
<td>Payment operations on current accounts</td>
<td>6.0%</td>
<td>6.7%</td>
<td>6.7%</td>
<td>8.6%</td>
<td>10.3%</td>
<td>4.5%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Insured mail</td>
<td>50%</td>
<td>60%</td>
<td>70%</td>
<td>80%</td>
<td>90%</td>
<td>100%</td>
<td>50%</td>
</tr>
</tbody>
</table>

- I don't know
- I never sent this type of shipment before
- I am completely satisfied
- I am moderately satisfied
- I am neither satisfied nor dissatisfied
- I am moderately dissatisfied
- I am completely dissatisfied
Can you tell me how pleased you are with the way a shipment has been delivered to you?

<table>
<thead>
<tr>
<th>Service Type</th>
<th>I never received this type of shipment before</th>
<th>I don’t know</th>
<th>I am completely dissatisfied</th>
<th>I am moderately dissatisfied</th>
<th>I am neither satisfied nor dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letters</td>
<td>55.9%</td>
<td>52.0%</td>
<td>46.1%</td>
<td>18.0%</td>
<td>17.6%</td>
</tr>
<tr>
<td>Postcards</td>
<td>16.8%</td>
<td>6.3%</td>
<td>5.0%</td>
<td>2.3%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Registered mail Packets up to 10 kg in domestic transport</td>
<td>22.3%</td>
<td>16.8%</td>
<td>42.9%</td>
<td>7.8%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Sending packages up to 20 kg in foreign transport</td>
<td>29.5%</td>
<td>32.8%</td>
<td>59.2%</td>
<td>5.2%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Post of Serbia (for the same day, for the next day)</td>
<td>32.8%</td>
<td>32.8%</td>
<td>59.2%</td>
<td>5.2%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Receiving money</td>
<td>47.7%</td>
<td>8.5%</td>
<td>26.2%</td>
<td>11.0%</td>
<td>17.6%</td>
</tr>
<tr>
<td>insured mail</td>
<td>50.0%</td>
<td>60.0%</td>
<td>59.2%</td>
<td>5.2%</td>
<td>18.0%</td>
</tr>
</tbody>
</table>
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%
Can you tell me what time do you usually receive shipments?

- 6am – 8am: 64.5%
- 8am – 12pm: 18.7%
- 12pm – 5pm: 12.1%
- 5pm – 8pm: 5.9%
- I don't have a specific time: 11.2%
- I don't know: 0%

What time does it suit you to receive shipments?

- 8am – 12pm: 43.2%
- 6am – 8am: 35.1%
- 5pm – 8pm: 11.2%
- I don't have a specific time: 5.9%
- I don't know: 0%
In case you are unable to receive a shipment personally, would you agree to have it delivered to:

- An adult member of your household:
  - Yes, I would agree: 10.6%
  - No, I would not agree: 88.6%
  - I don’t know: 8%

- A neighbor:
  - Yes, I would agree: 63.1%
  - No, I would not agree: 34.2%
  - I don’t know: 2.7%
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%

- Yes: 90%
- No: 8%
- I don't know: 2%
### PAYING BILLS, INTERNET

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almost completely, I use e-mail whenever possible</td>
<td>17.80%</td>
</tr>
<tr>
<td>Partially, I sometimes use e-mail</td>
<td>25.70%</td>
</tr>
<tr>
<td>I don’t use e-mail</td>
<td>56.50%</td>
</tr>
</tbody>
</table>

**Do you use e-banking for paying of bills?**

- Yes: 10%
- No: 88%
- I don’t know: 2%
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%.

- Because I’m used to paying bills in a post office: 52.7%
- Because I don’t know how e-banking works: 18%
- Because I don’t trust e-banking: 12.1%
- Because I’m not aware of that option: 6.2%
- I don’t know: 3.8%
- I don’t have internet or computer: 2.6%
- I don’t pay for bills personally/someone else pays: 1.7%
- Other reason: 1.6%
- I don’t have an account/card/regular income/job: 1.3%
Which bills do you pay using e-banking?

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

- For a cell phone: 2.5
- Internet: 1.4
- Cable TV: 1.1
- Landline phone: 1.1
- Electric energy: 1.1
- Water: 0.5
- Central heating: 0.5
- Waste disposal: 0.4
- Repayment of a loan installment: 0.4
- Land: 0.3
- RTV subscription: 0.3
- Gas: 0.2
- Other: 0.2
How often do you use Internet at home?

- Every day/nearly every day: 45.3%
- 2-3 times a week: 7.8%
- Once a week: 4.5%
- 2-3 times a month: 4%
- Less frequent: 4.3%
- Never: 33.5%
- I don’t know: 0.6%

How often do you use Internet at work?

- Every day/nearly every day: 14.1%
- 2-3 times a week: 3.2%
- Once a week: 0.9%
- 2-3 times a month: 0.9%
- Less frequent: 3.1%
- Never: 31.1%
- I don’t know: 4.2%
- Unemployed, student, pensioner: 42.6%
How often during a day do you:

- Make calls using your cell phone:
  - I don’t know: 47.3%
  - Once a day: 29.3%
  - 3-5 times a day: 13.8%
  - Over 5 times a day: 7.6%

- Make calls using your landline phone:
  - I don’t know: 36.2%
  - Once a day: 21.0%
  - 3-5 times a day: 28.1%
  - Over 5 times a day: 4.7%

- Send text messages:
  - I don’t know: 21.0%
  - Once a day: 37.8%
  - 3-5 times a day: 25.3%
  - Over 5 times a day: 13.5%

- Send e-mail:
  - I don’t know: 7.5%
  - Once a day: 10.4%
  - 3-5 times a day: 22.3%
  - Over 5 times a day: 54.1%
How did you wish your friends and family a Happy New Year this year?

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only in person (face to face or on the phone)</td>
<td>87.6%</td>
</tr>
<tr>
<td>E-card via the Internet</td>
<td>5.0%</td>
</tr>
<tr>
<td>Other</td>
<td>3.9%</td>
</tr>
<tr>
<td>Postcard sent via a post office</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, I don’t send them, I’m not interested in e-cards</td>
<td>51.0%</td>
</tr>
<tr>
<td>No, I wouldn’t pay for e-cards</td>
<td>21.6%</td>
</tr>
<tr>
<td>Yes, if the price is lower than the price of sending a card via a post office</td>
<td>14.2%</td>
</tr>
<tr>
<td>Yes, regardless of the price</td>
<td>9.5%</td>
</tr>
<tr>
<td>I don’t know</td>
<td>3.7%</td>
</tr>
</tbody>
</table>
Thank you for your attention