



Quantitative Study on Usage of Postal Services amongst Romanian Residentials - Executive Summary Report -

Chapter I: Awareness and Usage of Postal Services

- The top 3 best known postal services are also the most used ones: letter mails, national and international, with 85% awareness level, and 49% usage over the last 12 months; parcels, with awareness of 80%, and usage of 37%; and registered mails, with 77% awareness, and 29% usage.
- The next best known services are postal money orders (with 61% awareness, and 17% usage), confirmation of deliveries (with 62% awareness, and 14% usage), and pay on deliveries (with 58% awareness, and 14% usage).
- Insured mails, Express-courier services and addressed mails recorded awareness around 50%, and usage of less than 10%. The last position - considering awareness and usage criteria - is occupied by addressed mails (with 34% awareness, and 1% usage).
- Generally, the postal services usage in urban areas is higher than in rural areas. The most significant differences are noticed for parcels (40% usage in urban areas, compared to 32% usage in rural areas), registered mails (10% usage in urban areas, compared to 4% usage in rural areas), pay on deliveries (19% usage in urban areas, compared to 6% usage in rural areas), confirmation of deliveries (18% usage in urban areas, compared to 9% usage in rural areas).

- The usage incidence is directly correlated with the education level of the postal services users, in case of parcels, registered mails, insured mails, pay on deliveries and confirmation of deliveries.
- Less than 10% of the total number of postal services users (as senders only) use at least one type of these postal services, more than once a month. For the majority of services, the most common usage frequency is several times per year.
- The total average spending on postal services, amongst postal services users, is RON 87.3 per year, at national level: RON 106.2 per year, in urban areas, RON 56.5 per year, in rural areas.

Chapter II: Postal Services Providers

- C.N. Poșta Română is by far the leader on the market, considering the spontaneous awareness (96% at national level), the prompted awareness (100%), and the awareness of the providers available in the respondents' area of residence (97%). The second major player is Fan Courier Express, with 65% spontaneous awareness, 75% prompted awareness, and 45% awareness of the providers available in the respondents' residence area, followed up by Urgent Cargus (44% spontaneous awareness, 56% prompted awareness, and 29% awareness of the providers available in the respondents' residence area), and by Posta Atlassib Curier Rapid (32% spontaneous awareness, 46% prompted awareness, and 16% awareness of the providers available in the respondents' residence area).
- All the other providers achieved less important scores for awareness (less than 20% for spontaneous awareness, and below 30% for prompted awareness).
- Generally, the postal services market is a low awareness one. At national level, on average, there are 3.2 providers mentioned spontaneously, and 4 providers mentioned prompted. As expected, in urban areas awareness is higher than in rural areas (on average, in urban areas there are 3.9 providers mentioned spontaneously, and 4.7 providers mentioned prompted; in rural areas there are 2.2 providers mentioned spontaneously, and 3 providers mentioned prompted).
- Consistent with its leadership position on awareness, C.N. Poșta Română is leading also on usage, for all types of postal services. The ranking of the awareness top is replicated also in the usage



top, for each postal services category. Thus, C.N. Poșta Română is followed, at a long distance, by Fan Courier Express, Urgent Cargus and Posta Atlassib Courier Rapid.

- The satisfaction with the postal services providers is generally high, most of the providers getting scores over 8.4 (on a scale from 1 to 10).
- For each postal service category used, C.N. Poșta Română is chosen mainly due to its affordable prices (more than 50% of each service users mentioned C.N. Poșta Română as their choice).
- The main differences between providers for specific categories of postal services, used nationally, are:
 - For letter mail, national and international, Urgent Cargus and Fan Courier Express are chosen mainly because of their safety in delivery; these two providers achieved better scores than C.N. Poșta Română;
 - For parcels, national and international, Urgent Cargus, Fan Courier Express and Posta Atlassib Curier Rapid, are chosen mainly because of the quality of their services, and next, because of their safe delivery; for quality, all the mentioned providers outperform C.N. Poșta Română, but on the safety criterion, only Urgent Cargus's scores exceed those of C.N. Poșta Română.
 - For registered mails and payments on deliveries, Fan Courier Express is chosen mainly for the quality of their services and for the safety in delivery (its scores are higher than those of C.N. Poșta Română).
- The high satisfaction with postal services providers is reflected both by users' past behaviors and by their intentions for the future. Most of the postal services users have never changed their provider (more than 80% of the users, for any type of services), and, at the same time, they have no intention to do that for the future.
- As a result, the reasons for changing the provider are just a few, and they get insignificant scores.
- The barriers in changing the providers – identified while analyzing the past behavior and the intentions regarding the future use of all the types of services – seem to be quite low, considering that users are satisfied about prices, did not experience delivery problems, and are satisfied with the providers' staff. Almost one in three service users (except the users of express-courier services,



which achieved lower scores), mentioned as a barrier in changing their providers, the lack of an alternative provider in the expedition area.

Chapter III: Substitutability of postal service

- Under a scenario of a 10%-15% increase in prices, almost half of the users for a specific type of service will keep using that service, in the same way. Nationally, between 5%-16% of postal services users declare that they will no longer use a specific service, in case of such an increase.
- Although the proportion of those who declare that they would use the service in the same way falls in case of an increase in prices with 20%-25%, the proportion of the users who would not use the service anymore is below 20%, nationally, for any type of service considered in the study.
- In case of similar prices and quality, C.N. Poșta Română is the most-preferred provider for letter mails and parcels, mentioned by almost 8 in 10 users. The next preferred provider is Fan Courier Express, appreciated by 13% of users, and then follows Urgent Cargus, preferred by 4% of users, under similar price and quality.
- In the event of a 10%-15% increase in prices for a specific service, more than half of users declared that they would continue to use the same service. The main types of possible replacements for letter mails, for parcels and for registered mails, are as follows:
 - For letter mails: 5% of users would use electronic communication services, 3% would choose confirmation of delivery services, respectively express-courier services.
 - For parcels sending: 15% of users would use courier services, 4% would choose confirmation of delivery parcels sending.
 - For registered mails: 8% of users would opt for courier services, and 7% would choose express-courier services.

