

right sights on insights.

Study regarding consumption preferences
of mail services users individuals in
Romania
Qualitative research report



exact[®]
www.exactcc.ro

01. Introduction

Objectives
Methodology

02. Results of research

Perceptions and attitudes on mail services

Mail services usage habits

Image of Romanian Mail Service and of the
other providers of mail services

03. Conclusions and recommendations

Contents

Introduction

01

Objectives

The main objective of this study is to obtain a set of relevant information regarding the consumption preferences of the users of mail service individuals regarding the delivery speed of mail, collection/delivery frequency of mails, time of delivery, place of delivery, access to mail offices and their working hours etc.

The information will be used to evaluate the global service in the field of mail services and to identify the need for the introduction of new mail services.

Specific objectives:

- ☑ Users preferences regarding the delivery speed of mail (d+1, d+2 etc.);
- ☑ Users preferences regarding the frequency of collecting mails (at least twice a week in exceptional cases or five times a week, on Saturdays etc.);
- ☑ Users preferences with respect to the access to mail subunits having working hours with the public and their working hours and, respectively, regarding the access to mail boxes and their emptying program;
- ☑ Users preferences regarding the frequency of delivery of mail and non-mail dispatches, according to the types of services;
- ☑ Users preferences regarding the place (recipient domicile, mail box, general delivery etc.) and the time of delivery;
- ☑ Users preferences regarding the quality of services provided (on time delivery, number of lost dispatches etc.);
- ☑ Users preferences regarding the tariffs of mail services (uniform / differentiated tariffs according to destination, tariffs level etc.);
- ☑ Users preferences regarding the coverage of the mail network;
- ☑ Identification of any possible new characteristics for mail services that the users want (for example collecting post from the domicile of the sender, sending the correspondence by e-mail followed by the delivery in physical form to the recipient etc.).



Methodology

Investigated universe is represented by the population of Romania, in the rural and urban environment.

Target population – individuals in Romania using mail services, as senders and/or recipients.

Sampling unit – aged at least 16 and directly involved in using the mail services.

The research was focused on:

- ☑ Women and men in Romania
- ☑ Aged between 16 and 55+
- ☑ Residing in the urban and rural areas (urban - Bucharest, Craiova, Bacău; rural: Vrancea county: Căndești, Bordești, Tâmboiești)
- ☑ Users of mail services as senders and/or recipients
- ☑ Persons of all social categories, of all categories of incomes



Methodology

Taking into consideration the objectives above Exact Cercetare si Consultanta performed a qualitative research which consisted of **15 focus groups based on the following structure:**

Group no.	Age category	Age	Gender	Residence	City
1	16-34	16-24	Mix	Urban	Bucharest
2			M		Craiova
3		25-34	F		Bacau
4			M		Bacau
5	35-54	35-44	F		Bucharest
6			Mix		Craiova
7		45-54	F		Bucharest
8			M		Bacau
9	55+	55-64	F	Rural	Craiova
10			M		Bucharest
11		65+	Mix		Bacau
12			M		Craiova
13	16-34	16-34	Mix		Tamboiesti/Focsani
14	35-54	35-54	F		Candesti/Focsani
15	55+	55+	Mix		Bordesti/Focsani



Results of the research

02

A grayscale photograph of a person with long hair, wearing a light-colored baseball cap and a plaid shirt, placing a card into a slot of a metal locker. Several other lockers are visible in the background, some with cards already inserted. The text 'Perceptions and attitudes to mail services' is overlaid in white on the right side of the image.

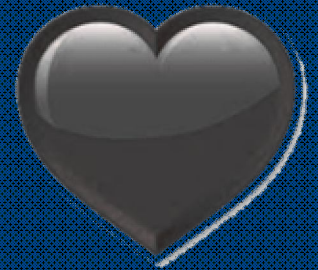
Perceptions and attitudes to mail services

Spontaneous associations

When talking about mail services, going over the general and unanimously accepted meaning of connection, bridge between people, the respondents report to them both **emotionally** and **functionally**

Emotional associations

- ❑ From an emotional point of view, mail services trigger a **feeling of melancholy** among users (especially for the mature target), being associated with the **old times**, with the **youth years**, in which the use of services such as postcards, holiday postcards, letters was still a habit and when **it was fashionable to collect post stamps**
- ❑ **Audio / sound symbol** – matrix printer and the stamp (manner/rhythm of stamping)
- ❑ **Visual signal** – the **logo** of the Romanian Mail Service, the postman uniform and his/her specific bag
- ❑ **Feeling of familiarity** – especially in the rural environment – the postman is perceived as a person who is a friend of everybody, enters everyone`s house



Verbatims



"Now is summer and the most beautiful thing is wherever we went we sent greetings from the beautiful seaside." (FGD Bucharest, Men, 55-64 years)

"Or a postcard, I think it is more charming to write a letter and receive one back. (...) You receive it and you keep it, you put in the memory box." (FGD Craiova, Women, 55-64 years)

"Or when the postman comes calling you at the gate... It is somewhat nostalgic." (FGD Craiova, Women, 55-64 years)

"Certain stamp issues were made permanently by mail, some more special than the others, reason for which these stamps were bought, collections were made and than those having collections of stamps came and exchanged stamps (...). This was for a very long time the main hobby, the same as some were crazy about chess, others were with philately." (FGD Bucharest, Men, 55-64 years)

"Anyway, lately the mail services have been losing ground to the internet, the emails. Parcel sending still remains.." (FGD Bucharest, Women, 45-54 years)



Spontaneous associations

Functional associations



Verbatims



"The need is the same, to communicate the same as 50-100 years ago but like everything in this world things have evolved and from the communication of the type "Hi, Mum, I`m on the front, how are you?" I got as far as sending my nephew in from Romania to Italy a parcel. It is the same thing, to send and receive things." (FGD Bacău, Men, 25-35 years)

"It`s a help for us to keep in touch with the other abroad and vice-versa. They send to us things, we send to them. It is very important to have nephews, children abroad and it is important to keep in touch." (FGD, Bacău, Mix, 65+ years)

"Mail services are very useful, like any other services, in the end because they are made for this, to make life easier for us." (FGD Bucharest, Women, 45-54 years)



Benefits

Mail services are also interpreted according to the experience the participants had with them in time. Thus, beyond emotional and functional significance, mail services shall also be understood as the idea of:

- » **Safety and trust** – old services belonging to the state and which have been in place for many years
- » **Comfort** – the customers do not have to travel to the recipient (especially when talking about far regions or other countries)
- » **Fastness** – relatively short delivery/receipt time
- » **Accessibility** – lower tariffs by the Romanian Mail Service

General perceptions about mail services in Romania

- ❑ **Mail services are generally associated with the Romanian Mail Company** its age is such that for certain targets the two concepts are synonymous. There are even situations in which people refer to the private mail services as courier services, parcel sending being the type of service that made them known and keeping the term of mail services exclusively for the Romanian Mail Service.
- ❑ **People do not distinguish between mail services and non-mail services.** For them any services provided by the Romanian Mail Service is a mail service (including also pensions, child allowances, payment of invoices, sending money). The only services they consider annexes (non-mail) are the sale of greeting cards, ball pens, etc.
- ❑ **In general, the young public rarely uses mail services,** some of them never used them and **are not familiar with them, the online mail and phone services** taking over all these functions which could previously be performed only by the Romanian Mail Service.
- ❑ This substitution of certain mail services by new technologies appears even in the mature public where the phone is the main means of communication and regarding the access to the internet, the new generation plays a very important role in initiating older people in using this fast and cheap means of communication.

General perceptions about mail services in Romania

- ❑ The general perception referring to the payment of mail services in Romania is a positive one, the respondents being aware **o an evolution which is both in the numbers and in the quality** of these services.

"They developed quite significantly, competitors of the Romanian Mail Services have emerged which more or less have hit the Mail Service hard and the market is still in need of competitors as far as I know, there is still enough room for others." (FGD Craiova, Men, 16-24 years)

"I think that the services are very diversified currently, there is a sufficient number of suppliers of such mail services." (FGD Craiova, Mix, 35-44 years)

- ❑ **The private environment seems to gain more and more ground in front of the state companies**, especially for younger users who want a higher degree of comfort and promptitude

"Most people are currently going to courier companies, if you want to send a table you send it by the courier companies. The invoicing services, letters, allowances, pensions will disappear because there are already many people who have cards." (FGD Craiova, Men, 16-24 years)

General perceptions about mail services in Romania

❑ To this **competitive picture** adds the **online environment** which appears also to have replaced much of the mail services – especially those related to communication.

"In general communication services are oriented to the online environment because they are faster; if you send a letter it may reach its destination within days, an email reaches in maximum 10 minutes."
(FGD Craiova, Men, 16-24 years)

❑ Even if most mail services offered by the Romanian Mail Service can be replaced, finding a substitute with different private providers, **they still remain among the top options and preferences especially of mature target (40+) and inhabitants of rural areas** who are emotionally attached to the Romanian Mail Service and who have succeeded in time to develop in them a high level of trust. Also, in the **rural area** there is a certain **dependency of users** to the mail services offered by the Romanian Mail Service as the **single provider in the area** who also has **low tariffs**.

"We put more trust in the Mail Service than in the private mail services, because the former do not cheat on you. Nothing bad happens ... Like at the doctor: you go to that doctor until something bad happens. The same here, the Mail Service has been ok so far" (FGD Bucharest, Men, 55-64 years)

"In Romania we have had trust in the mail services throughout the years. Nobody doubted that they come in time, that the postman comes, the parcel arrives. Now they have developed, more services appeared. I still trust the National Mail Service more." (FGD Craiova, Women, 55-64 years)

Development of mail services in the last years

- ❑ Regarding the **evolution** of mail services in the last years, there is the general perception that, both the Romanian Mail Service and the suppliers in the private sector, have tried to **improve their services** in order to meet the customers needs as far as possible.
- ❑ On the one hand **the Romanian Mail Service** has tried to improve the **technologic dimension** by the introduction of computers and new services (e-sending, faster money transfer) and on the other hand, **private suppliers have improved their technology** (new, faster cars) and **invested in personnel** and its training.
- ❑ Even if there has been an evolution on both sides, **the Romanian Mail Service** is perceived as an institution which is **overwhelmed by the needs of the modern customer** (they still use matrix printers, employees numbers have been reduced, they are older and they are now accommodating with computers, type slowly, units are not renovated etc.) even if the range of services offered is more diversified than that offered by the private providers.
- ❑ All these disadvantages of the Romanian Mail Service are related to a **general perception of Romanians referring to state institutions that have stagnated and that cannot keep up with the current needs and requirements of customers.**

"No courier service has as many services as the Romanian Mail Service. The Romanian Mail Service has many services but poor ones." (FGD Bucharest, Men, 55-64 years)

"Many are putting their pensions on cards but since we do not know how to use them we prefer the postman to come." (FGD Craiova, Women, 55-64 years)

Development of mail services in the last years

"For example at the Romanian Mail Service you can also pay invoices, the road tax while at the other companies you cannot do this. (...) It is a state company. But the management was also bad because they had all the infrastructure and know-how to become, to be number 1 in the country. Probably the courier companies now active in the country started a long time after them but they reached much higher standards." (FGD Craiova, Mix, 35-44 years)

❑ **The private sector, however, experienced a true evolution being much closer to these new needs of the consumers** (especially of the younger public) having the advantage of promptitude, comfort (everything is taken from home and distributed also at home, at the office, communication is a lot better) and control (there is higher control on dispatches through the AWB tracking system provided).

"Those who are in the private sector have invested extensively in manpower, logistics. I know people from courier companies who are very well prepared and know what they have to do. If you tell them to bring your parcel at a particular time, they bring it to you precisely at that time." (FGD Craiova, Men, 16-24 years)

❑ **Old people are reticent when it comes to changes/upgrading** – they do not necessarily want their pension on the card and they do not make online orders but they admit that the Romanian Mail Service needs resources (mail offices in the rural area, transport means, security, work telephones, etc.) to make the employees more operative/efficient and the consumers more satisfied – so they no longer stay in queue, their parcels/letters are no longer lost and their postcards/greeting cards no longer get to the destination with delay.

Development of mail services in the last years

❑ The elderly are more reticent also when they think about the future of mail services, for them these being largely synonymous with the Romanian Mail Service. It is expected that the decreasing trend is maintained or that the company is privatized and transformed so much that it is able to keep up with the times. This fear is associated also with the fear of losing in accessibility both as price and as usage.

❑ Even if there is the reticence of the respondents regarding an evolution of mail services, **the suggestions of improvement the users have for the following years** refer to several aspects related to the improvement of the quality of services offered by:

- ⇒ **Faster delivery on short distances** – for example delivery by bicycles. In order for the services to reach maximum profitability better infrastructure is needed which, currently, is a real problem
- ⇒ **A larger number of well trained employees**
- ⇒ **Parcel unpacking service** – a new and highly appreciated service now with private providers especially connected with online orders
- ⇒ **Borrowing models from the West which could make services more efficient**

"For example those from Amazon have implemented in America and in certain cities the delivery service by drones. You introduce the address, and they come and leave the parcel at your home, you pay by card." (FGD Craiova, Men, 16-24 years)



Mail services usage habits

Frequently used services

The mail services most used by respondents are:

- ☐ The domestic and international parcels, sent or received; in general parcels are received following online orders – ancillary products both from websites in Romania and from websites in other countries (China, America)
- ☐ Correspondence – simple, registered or with acknowledgement of receipt
- ☐ Post order service on paper
- ☐ Subscriptions to different magazines and newspapers (especially in the rural areas)

Non-mail services used frequently by respondents are the following:

- ☐ Pensions/ allowances - services used especially by the users in rural areas, those in urban areas use cards
- ☐ Payment of utilities (invoices), payment of taxes, fines
- ☐ Transfer of money (by Western Union)

Frequently used services

Parcel management



- **WHAT?** => online orders **WHO?** => young target **WHERE FROM?** => from online sale specialized sites (most frequent example: eMAG)
- **WHAT?** => online orders **WHO?** => young target **WHERE FROM?** => from specialized sites in the sale between natural persons, like adds (most frequent examples: olx.ro)
- **WHAT?** => sales agent activity in cosmetics trade mechanisms **WHO?** => young target (ex: Avon)
- **WHAT?** => international online orders **WHO?** => young target **WHERE FROM?** => China/ America (ex: Amazon/ Ebay)
- **WHAT?** => books parcels **WHO?** => irrespective of target **WHERE FROM?** => different editing houses
- **WHAT?** => medication parcels **WHO?** => older people target **WHERE FROM?** => from different suppliers
- **WHAT?** => teleshopping parcels **WHO?** => mature target
- **WHAT?** => domestic and international parcels **WHO?** => between relatives / friends – may contain anything from clothes to food products (even if some are not declared as such)

Frequently used services

Correspondence



- Mentioned quite seldom by the investigated target – only on special occasions and especially by the older target
- The part of invoice receipt is associated with a default service – they did not choose it/they are recipients – here the highest preoccupation is for the date when the invoice reaches the destination (so that the invoices are not received after the due date)

Printers



- Very little mentioned (books, magazines, newspapers), especially by the older public
- It is a service which remained in the family like a legacy; they do not give up the subscription/creates a feeling of intellectuality.

Frequently used services

Recommended with/without acknowledgement of receipt, with/without declared value



- Mentioned for sending documents/justifying documents/invoices/expense accounts – many times related to the job
- Used both by the mature/active target and by the old target on occasions in which they solved different problems with the state institutions – pensions house/taxes and duties, etc.

Express Service



- Very little mentioned, often mistaken for other services
- Not communicated and not recognized by some
- Those who used it found in it the benefits of private parcel sending services and certain aspects of modernity such as the parcel tracking/ monitoring system

Frequently used services

Cash on delivery service



- In principle associated with private parcel sending services
- Cash on delivery in collector account or directly
- Many times replaced with the delivery of money into account through the bank followed by sending the parcel or combinations of money transfer and parcel delivery
- Associated with the option of opening a parcel in the case of private suppliers – online orders (especially those between individuals) – the parcel can be rejected

Money order on paper



- Mentioned especially in rural areas
- Substituted with the electronic service or with the sending by Western Union type services
- There are negative experiences related to money missing at the destination

Selection of suppliers for each mail service

- ❑ In most cases, users select their suppliers according to certain criteria, but there are situations in which the supplier is established directly, especially in the case of parcels ordered from different websites. For example, some websites in Romania collaborate only with certain private suppliers while international parcels come automatically through the Romanian Mail Service - *"Two weeks ago I ordered a cooler on eMAG and I could only use Fan Courier since there was no other option on the website."* (FGD Craiova, Men, 16-24 years)
- ❑ There is also the situation of using certain services selected and paid by the employer company, those for business purposes. People make reference also to those many times when they are asked if they use mail services, although they are used for the benefit of the employer.
- ❑ Among **the criteria most often mentioned spontaneously** by the users when choosing a certain provider of mail services are:



- ❑ Understood as the urgent receipt/reaching at the destination of a certain parcel/envelope. **For the young public** it is more important to receive the parcel/envelope fast and are willing to pay more to a private provider, but **for the older target**, the urgent sending/receipt of the parcel does not seem to be an essential selection criterion.
- ❑ As suppliers, those from the private sector are rather preferred in the case of urgent parcels, while the Romanian Mail Service is selected (especially by the mature public) in the case of usual parcels/envelopes, which can reach the destination in a longer time period (due to the accessible price).

"I consider this an advantage especially for us the young people who are anxious."
(FGD Craiova, Men, 16-24 years)

Selection of suppliers for each mail service

Price

❑ Important especially for mature users (pensioners especially) or for those in rural areas whose incomes are low.

❑ In this case, the Romanian Mail Company is selected to the detriment of private companies providing mail services because the prices are a lot lower, "by half" .

"Well, the lady is right, I always go for the cheaper ones." (FGD Craiova, Women, 55-64 years)

Notoriety

❑ Certain suppliers succeed in becoming credible and "trustworthy" due to good visibility and extension they have. This image is especially appreciated by young customers who, before calling for such services, inform themselves and search the "top" of the most visible/appreciated companies.

Previous experience

❑ A valid criterion both for the young public and for the mature one; people use to return to the same providers with whom they worked previously, if the experience was a positive one.

" Because we are older we go with the Romanian Mail Service, by daughter does not work with the Romanian Mail Service, but only with new companies, but myself and my wife go a lot with the Romanian Mail Service. It is safer." (FGD Bucharest, Men, 55-64 years)

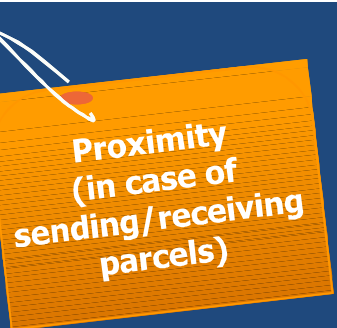
Selection of suppliers for each mail service



Safety

- ❑ The idea of safety refers to the following aspects: the control customers have on the parcel, takeover only by the recipient appearing on the envelope/parcel, care for the parcels "how they treat the parcels, if they throw them or not", transport conditions, storage conditions, not to be opened, to reach the recipient.
- ❑ Both the Romanian Mail Service and private suppliers are preferred by the users based on certain advantages they can offer in terms of safety.
- ❑ Thus, the Romanian Mail Service can be considered to be "more trustworthy, safer" than private suppliers because they only release the parcels to recipients, they can keep the parcels for a few days in the case in which the recipient cannot collect it. With the Romanian Mail Service perceived safety comes from age/experience/state institution/familiarity – you expect it to be safe in the sense that the parcels will arrive at destination, they will not be opened or deteriorated – there were however videos on youtube proving the defective manner of transport and even witnesses, among the participants to groups, who can confess that there have been situations in which the parcels were transported in a defective manner.
- ❑ Also, in terms of safety, users consider that in the case of the Romanian Mail Company communication is limited, the customers are not called/do not call to see the status of the parcel, but the private suppliers provide continuous communication, from the time of sending to the time of receiving the parcel.
- ❑ On the other hand, private suppliers through the AWB service offer customers the possibility to track the entire route of the parcel. With the courier services safety comes from: ways of online tracking the parcel, flexibility in delivery (to any address, and to another person if so requested), motivated and specialized personnel which secure the safety of the parcels, the name that they have to build and maintain, the fact that they are a private company which, without offering quality services, would be out of the market.

Selection of suppliers for each mail service



Proximity
(in case of
sending/receiving
parcels)

❑ Important criterion both for selecting the services offered by the Romanian Mail Service and the services offered by private suppliers (who come to collect the parcels/envelopes from the domicile/place of work). Proximity is a decisive factor for the selection by the users who are in the proximity of mail offices but also for those who are located in rural areas in which the Romanian Mail Service seems to be the only alternative for receipt/sending.

"I, since I am not from the city use the Romanian Mail Service because their office is located the closest to my house and I know for sure I will bet to them quicker to collect the parcels, to send what I need to send." (FGD Rural Focșani, Women, 35-54 years).

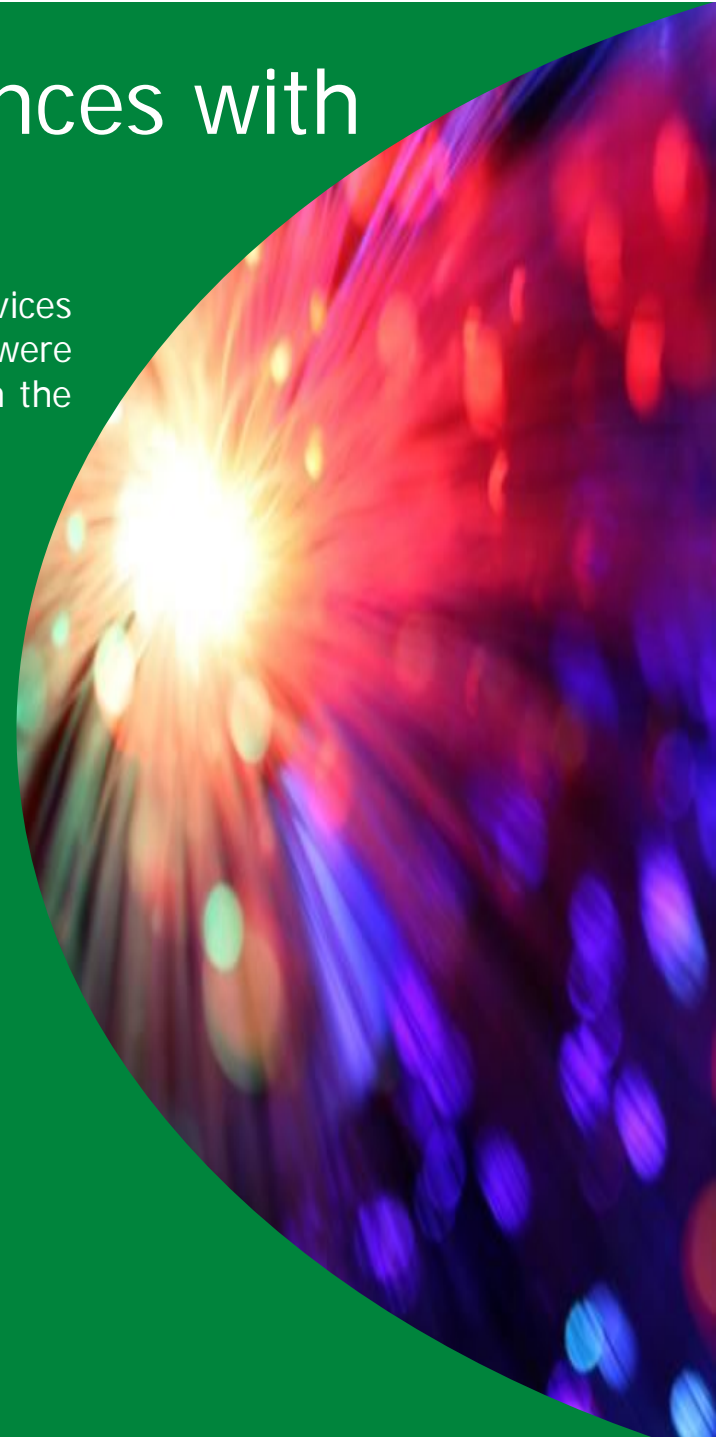
❑ For the private providers proximity does not translate into the existence of mail offices closer to the domicile/place of work but by collection / delivery directly to the domicile/place of work. This aspect is evaluated as being more comfortable than going there when the user is involved in an activity (at the office/home) and less appreciated when the lifestyle involves frequent travels and the lack of a fixed place/time for work/residence. Certain categories of persons (for ex. pensioners) do not take into consideration proximity or the place of sending/receiving as an important criterion, because they prefer to go there.

Positive and negative experiences with suppliers of mail services

In general, the experiences the respondents had with the mail services offered by the Romanian Mail Service and with the private providers were positive, in the sense that the final purpose was fulfilled, meeting both the needs of the sender and those of the recipient.

Positive experiences

- ↑ Safe sending/receiving mails
- ↑ Observing the timing communicated initially and receipt on time of mails
- ↑ Return of goods that were sent to a wrong address / a wrong name
- ↑ Good communication and relations with the employees of the Romanian Mail Service / private companies



Negative experiences

- ↓ **Crowding of offices** (especially of the Romanian Mail Service) which involves a long waiting time at the "interminable queues", especially around certain dates of the month (in the periods in which the pensions/allowances are paid); this is perceived as a result of the **lack of personnel due to** restructuring in the last years, which resulted in inefficiency regarding the waiting time and restricting the activity to only a few desks
- ↓ **Lack of care to the parcels** leading to their deterioration – cases met both at the Romanian Mail Service and at the private suppliers; the parcels were received deteriorated both on the outside (torn boxes, detached adhesive band) and at the interior (broken products, especially the most fragile ones)
- ↓ **Delays/losses:**
 - ▶ Registered letters that arrived late thus delaying trials or other important legal events
 - ▶ Long delivery time of mails – cases met especially at the Romanian Mail Service
 - ▶ Money orders placed in another mail box or brought very late and which led to delaying their receipt by a few months (in certain cases it was necessary a request to recover such "lot months") – a situation which is frequently met by the users who collect the money themselves on the allowances from the Romanian Mail and not have them transferred to their cards.
- ↓ **Delayed payment of pensions** – cases met especially in rural areas where users depend on the postman – because of a defective order of distribution, lack of money or personnel who have to cover a much larger territory within the same days.



Negative experiences

- ↓ **"Bribe" to collect parcels from the Romanian Mail Service** – cases met in certain cities in the country when, in order to collect their parcel, users have had to offer bribe to the employees
- ↓ **Parcels declared lost or "forgotten"** for which no damages were paid and which were never received or parcels/registered mail returned to sender without the recipient receiving any notification in the mail box or without them knowing of their existence
- ↓ **Parcels from which certain goods were missing** – associated more with international parcels received in the period before 1989, there were however a few current mentions but the situation is not clearly related to the provider of mail services or to the sender
- ↓ **Collection of parcels** only by the recipient without any concession in special cases – the person is not in the country, is in hospital, etc. – when they could be collected by a relative – parent/child/husband/wife
- ↓ **Collection of parcels** only from certain offices and not from all the mail offices
- ↓ **Payment of invoices made through the Romanian Mail Service** recorded long delays, which led to amounts accumulated on the subsequent invoices as not paid or, even more serious, to the termination of the respective services, although they were paid by the users – possible reason: very long delays in delivering the money received from users by the supplier possibly due to collecting the money locally to cover other services



Criteria for selecting suppliers of mail services

Delivery speed

Definition: mentioned also as spontaneous, the criterion which makes reference to the speed of delivery is an important factor in choosing a supplier of mail services. It is decoded as the time in which the parcel / mail reaches from the sender to recipient.

Actual situation: the speed of delivery is evaluated taking into account how urgent are the mails. In general, for the services of the Romanian Mail Service, people do not know the official durations of mails/parcels because they are not communicated expressly, this type of information are offered when post workers are asked by a user when the parcels/mails they have just sent will arrive.

The information they have regarding this aspect is based largely on the experience with the products (I know it arrived in x days). The frequent users, those who order online very often or send parcels in a current manner know the services better than the others. Beyond the more or less awareness of the information regarding delivery speed the users have the following perception: **with the Romanian Mail it lasts more but costs less, with a private courier service it reaches faster but costs more.** The price in relation to the speed of delivery matters also, reason for which users evaluate the urgency of sending (I am interested or not for it to reach very fast) and then decide the supplier they will work with.

This delivery speed takes into account several factors: time of submitting the mail (if the sender submits the mail in the second part of the day after a certain hour, a longer delay will apply – 1 day), the provider of mail services selected (private providers have a faster delivery time, but, newly, the Romanian Mail Service also has the Express service which delivers in 24 hours – service known to very few of the respondents), space of sending – national or



Criteria for selecting suppliers of mail services

Delivery speed

international, the type of service used etc. Users are aware of these aspects and evaluate the delivery speed also according to the criteria mentioned above in the sense that they are expecting for an international delivery to last more than a national delivery.

Preferences: beyond the current situation and all the aspects taken into consideration, the users want very fast services, in accordance with the times and lifestyle of today – the fastest service of 12 hours, the least fast 48 hours.

"Who of you has sent a letter lately, a simple letter. For example from ... to Bacau it takes 48 hours, from Bacau to Bucharest it can take 3 days, from Bacau to Timisoara it takes it a week." (FGD Bacau, Male, 45-55 years)

"So in the field of communication there is that terminology, of reasonable time, that reasonable time, currently used in the transportation field is of 48 hours." (FGD Bacau, Male, 45-55 years)

"We live a troubled time, we are in the century of speed and man has been accustomed to receiving services very fast. We no longer have patience with the Romanian Mail Service. It's a competition between services." (FGD Tămboiești, rural, Mix, 16-34 years)



Criteria for selecting suppliers of mail services

Delivery frequency **

Definition: this criterion is decoded also by two concepts:

- ☐ Frequency with which the parcels / correspondence is delivered at home in the mail boxes or at the destination (domicile/work place)
- ☐ Frequency with which the parcels/correspondence is delivered by the supplier to the mail offices or to the offices of the provider/centers.

Preferences: In terms of the first definition it is expected that the suppliers deliver throughout the duration of the program whenever necessary, aspect associated with private courier services. In the case of the Romanian Mail Service, the postman has a program and an area to cover that does not allow him to reach other than once on the delivery route. This aspect is perceived to have been caused also by lack of resources (car). From the perspective of the second definition, the aspects mentioned at the frequency of collection are here too valid.

Respondents are decoding with difficulty and confusion-- frequency of collection to delivery. It's an issue that is not currently considered and believe that it is related to the internal procedures and organization of the service provider. If they sit and analyze the situation very well they may have views on each of these two issues but what is most important is that they realize that these two aspects influence in the end the delivery speed, they would like them to be organized in a way that packages / dispatches arrive quickly and effectively. Beyond that they consider it the duty of the provider to regulate them internally. Ideally some aspects could be communicated to the public so that they can understand and use the system more effectively.



Criteria for selecting suppliers of mail services

Collection frequency **

Definition: Currently, users perceive the frequency of collection as the period of takeover of the parcels during an ordinary day.

This takeover is understood in two ways: takeover by provider from the sender and takeover by provider from the mail offices to be sent to the recipient.

From the perspective of the first definitions collections coincide with the working hours, anytime during the program the provider has to collect from senders the parcels/correspondence irrespective if it is collection at mail offices or directly at the domicile/work place.

Preferences: from the perspective of the second definition the users consider that **mail dispatches should be collected twice a day, 5 days a week Saturday included**, by the employees of the provider from the mail offices/collection centers and sent to the recipient.

Beside collection directly from offices, collection of post from mail boxes does not present trust for the users, many of them considering that they are no longer functional, and, even if they would be, *"no one comes to collect them"*. Additionally mail boxes seem to be a thing of the past, since people no longer seem to know them, no longer identify them, in the urban areas, in rural areas they are too few and seem unsafe (are made of plastic instead of cast iron as the old ones – can be vandalized).



Criteria for selecting suppliers of mail services

Proximity

Definition: It is interpreted as being on one hand the distance between post offices and users and on the other hand their density (no. of offices per city). This is not relevant for courier services who collect and deliver also at home / work.

Current situation: There is a perception that in recent years the number of Romanian Mail offices has decreased – are a lot fewer and some offices that remained have reduced their area (the actual space). This is all the more important as the Romanian Mail services are performed at the post office. Some users are influenced directly and have to travel more to the post office. Another important aspect that adds discomfort is that there are services that are only available in certain post offices in the city (applies to urban areas, except for Bucharest) (ex. Central Mail Service or Central Station Post Office). This issue concerns not only international parcels and affects the manner in which users perceive the proximity criterion.

In rural areas the situation is similar, there are villages left without post offices, post offices improvised at the home of the postman, used in common for several villages and only one post office per commune and considerable distance to them, especially for the elderly and for the level of dependency that rural residents have towards them (many mail and non-mail services are only available at post offices, the alternative being to travel to the nearest town).

Preferences: for the level of dependency of mail services provided by mail offices, users consider that there should be one mail office within a walking distance of 10/15 minutes from the domicile.



Criteria for selecting suppliers of mail services

Working hours

Definition: the working hours of mail offices and during which the mail services are available.

Current situation:

☐ **Romanian Mail Service**

- users have different opinions regarding the working hours and this is due also to certain program changes in time and to the different working times of certain mail offices
- in Bucharest most mentions referred to a working time between 8:00 and 19/20:00 and on Saturdays short program until 13/14:00.
- in urban areas were mentioned two types: 8:00/ 16:00 or 17:00, Saturday was not generally recognized as a working day
- in rural areas the program is almost non-stop in the idea that the postman finishes his/her program when the delivery round is completed and, even if there is a program it can be exceeded, the postman is a member of the community and is assimilated as such, practically integrated in the life of the community
- there is the perception that there is a lunch break but its regulation is unclear to the users

☐ **Private providers:** private services are not considered to have a special or different program but a regular one 9:00/ 18:00

The working time is evaluated by the **access to mail services:**

- For the private services, due to the fact that users can benefit from services directly at their work place, the overlapping of the program of the provider of courier services with the own program of the user does not create any discomfort



Criteria for selecting suppliers of mail services

Working hours

- For the services of the Romanian Mail service, the access to mail services involves the access to mail offices, if their program overlaps that of the user, then the latter no longer has access to them

Preferences: users would like the work program to be extended until 20:00 (especially for those who work and can not adapt themselves to the current program of the Mail Service). Another suggestion would be to create two shifts – from morning until noon and from noon until evening (20:00). Any change that results in an increase of the period in which those working can have access to mail services without giving up their work program is welcome.

At the same time users would like to open a **Call center** for the critical situations that appear, in order to talk with someone outside the work program.

"If you want to talk with somebody outside the program about a critical situation, there is no way. There is nothing, there is no call center, no possibility to contact them or an email address somewhere, nothing." (FGD Bacau, Male, 45-55 years)

"Or they could do something else, like the old times with that general delivery, (which as far as I know no longer exists but it could exist) to give you the possibility when you as a company or as an individual went there, left the parcel or what you left there where it came and it came nicely from space and came to collect the money, to collect whatever they have to collect, they can do something like this too..." (FGD Bacau, Male, 45-55 years)



Criteria for selecting suppliers of mail services

Place of sending/receipt

Except for the Romanian Mail Service that delivers/collects mail only from their offices, the main locations where the parcels are received or sent are at the home or at the workplace.

The collection / delivery service from home of the Romanian Mail Service is not known.

Users want more flexibility in this regard and the first step is to establish good communication with the providers of mail services. From this point of view, private providers have several advantages: good communication with employees (customers can call the employees to learn more details about the stage in which the package is and the employees call the users to inform them of the date / time / delivery location) and change of the delivery location if necessary (when they are not at home, for the parcels to be delivered at the workplace).

Quality

This criterion has been decoded by users as encompassing many aspects, from most important to those related to image. Thus the quality of mail services translates into: the manner of storage and transportation of mail items (envelopes, parcels), employee behavior towards customers, the company care to employees (what uniforms they have, standards of hygiene etc.), employee flexibility (changing the location of sending / receipt) the safety of services provided (timing observed).



Criteria for selecting suppliers of mail services

Tariffs

It is a very important criterion, especially for the older target and for users in rural areas and in general, a criterion considered in correlation with the service benefits (ex. Delivery speed) and the particular situation of the mail (ex. Registered mail with acknowledgement of receipt).

The services provided by the Romanian Mail Service are the most appreciated in price, having the lowest tariffs (some even at half the price), especially in the case of simple deliveries (not the Express / urgent deliveries which are close to the tariff of the providers in the private sector).

Beyond the affordable mail tariffs, also in the financial area is appreciated the lack of commissions on the invoices paid at the Mail Service. The perception regarding the tariffs is that they are accessible, irrespective of provider, and consistent with the benefits (higher price / lower delivery time). Beyond that there are special / atypical cases of services whose value is higher than the product itself (eg. Commission for money transfer greater than the sum transferred).

"If you send a postcard with the Romanian Mail Service you pay too much.[...] The receipt price is 8.5 lei." (FGD Bacau, Male, 65+ years)

"This one with acknowledgement of receipt, to Hungary 17 lei, to England, Germany 18 lei, it seemed expensive to me. What they were doing, they took a simple envelope with a sheet of paper." (FGD Craiova, Female, 45-54 years)

"7.5 lei registered letter with receipt confirmation. It seemed a lot to me for the confirmation. I wasn't expecting that much. I sent the parcel with medication and I paid 4 lei. And registered 7.5 lei ... This service seemed exaggerated to me. (...) It seemed a lot 7.5 lei. And it does not get there faster." (FGD Craiova, Female, 45-54 years)



Criteria for selecting suppliers of mail services

Coverage

Coverage refers to all the places from where and to where can be sent / received - you have access to mail services.

From this perspective both the Romanian Mail and the private providers have a very good national coverage, being able to reach every area. However, private providers are associated with urban areas for any service provided in a rural area is charged extra and very remote areas are not covered, especially due to high extra costs.

Internationally, parcel services seem to work better by the Romanian Mail Service and by certain private providers who are rather transportation companies than courier companies.

A competitive advantage that the Romanian Mail Service has is due to the presence of mail offices in rural areas (in communes) and mailboxes in each village. In addition, there are postmen going even to the most inaccessible villages.

At the level of coverage consumers consider that the Romanian Mail Service has the largest coverage, which makes the mail services to be accessible to everyone.



Criteria for selecting suppliers of mail services

Personnel

Definition: quality (professionalism/ training/ qualification/ relations with customers) and quantity (no. of employees)

Current situation: From both perspectives, users' perception is that private providers have several advantages in this regard, having well trained staff with whom you can communicate better and on whom you can rely. The personnel belonging to the Romanian Mail Service belongs to the "former generation" and no longer demonstrates the same kindness as those employed in the private sector. Users describe them as: apathetic, angry, overwhelmed by technology, limited. However, beyond these negative aspects, in rural areas we can notice an increased attachment of users to postmen, especially due to their effort to travel in order to distribute monthly incomes (pensions, allowances, social benefits). From the point of view of the number, the staff of the Romanian Mail Service is associated with increased job cuts both in rural and in urban areas, which affects the quality of services.

Preferences: sufficient personnel, trained both on the services they sell but also on how to interact with the public, modern resources, efficient, able to solve even cases where there is seemingly no solution, willing to listen and understand the situation of each client, informed and willing to provide clear and complete information on mail services and direct users to the most appropriate service and to make efficient use of their own time etc.





The image of the
Romanian Mail
Service and other
providers of postal
services

The ideal provider of postal services is defined by the following characteristics:

Increased visibility

Communication by means of advertisement, extensive coverage in terms of number of offices

Modern locations

Clean, well-ventilated, spacious enough to prevent overcrowding, with new furniture, so as to gain the customers' trust

Modern means of transportation

Large vehicles, well-maintained for long-distance trips and fast for short distances; motor-scooters, bicycles

Constant communication

Not only at the time when the mail is deposited at the post office, but also throughout the entire duration, in order to inform the clients with respect to the status of their mail

Technology suitable for the services provided

Modern computers, which prevent future system breakdowns, updated websites, parcel control systems

Qualified personnel

Polite, well-trained, well-acquainted with the technology

Flexibility

Sending/ collecting mail in various locations

Special services for products

Perishable products (refrigerated transportation), large shipments (household appliances)

Packaging system

In particular for fragile items requiring special packaging.

Additional features:

- ☐ Modern website
- ☐ Call center
- ☐ Automatic machines for tax stamps
- ☐ Line-number tickets
- ☐ Internet access (allowing e-mail use)
- ☐ Loyalty/identification card
- ☐ Same-day delivery services

The Romanian Mail Service

Rational image- General issues

- ❑ During the past years, alongside the development of private providers of postal services, the Romanian Post has come to be perceived as “overwhelmed by the circumstances”, **conservative, unable to meet the needs of modern users**.
- ❑ This outdated image is also due the **general perception** of Romanians **with regard to state institutions** which **no longer succeed in managing current requirements** and continue to function under the same old system. Even though there have been, as far as the Mail Service is concerned, some attempts toward modernization in terms of technology, the personnel is viewed as too “old” to be able to function efficiently with such methods.
- ❑ However, mature users and those living in rural areas still refer to the Mail Service as a **trustworthy institution**, and they use its services and are **nostalgic** when they recall the services that this institution used to provide in the past. Additionally, **in rural areas**, the Romanian Mail Service is an institution on which **users depend for different services**: pensions, collection of parcels with medicinal products, but also **young people, teachers** (who order books, send documents or make money transfers, due to the fact that there are no banks/ATMs in the rural area) etc.
- ❑ **The young public**, however, **has switched** to services provided by **private providers**, because they feel **a greater need to communicate** with the employees, **to have control over their mail**, and to receive **fast service**.



The Romanian Mail Service

Rational image– Positive aspects

Even though the general image of the Romanian Mail Service is not based, on most cases, on positive attributes, there are nevertheless certain **advantages for which it is still appreciated by its users:**

- ✓ **a feeling of security, both with respect to parcels, as well as original copies of documents sent by mail**– on one hand, there haven't been frequent reports of cases in recipients faced problems with the collection of their parcels and, on the other hand, the postal institution benefits from the trust founded on its history, length of activity, experience within the field. Also, in most cases, users prefer to send certain original documents with the Romanian Mail Service. Beyond reliability, the envelopes containing documents, sent as registered mail with acknowledgement of receipt, cost less as compared to the courier services.
- ✓ **fast service with Prioripost** – if sent by 17:00, certain mail can be delivered within 24 hours.
- ✓ **mail carriers**- agents appreciated in particular by the users in the rural areas, who have created in time a close relationship with them, have a good opinion about them and appreciate their effort in doing their routes
- ✓ **low prices** – both for simple services, as well as for special ones (emergency delivery, registered mail etc.)
- ✓ **country wide coverage** – offices in every locality in the rural and urban areas, and where there are no offices, post-office boxes in which envelopes can be deposited.



Verbatims



"This post office is a necessity in the rural area, where many elderly people whose children left to the city have no means of transportation in order to go to the city and collect their retirement pension." (FGD Căndești, rural, Women, 35-54 years)

"The elderly, in general, are more at ease when they see the postman at their door." (FGD Tămboiești, rural, Mixed, 16-34 years)

"Plus, there are some services only the Post can provide. For example, at the Pensions Fund everybody knows that the pension decision, the employment record book, all notifications sent to us by the Pensions Fund, can only be sent by Post, it's not possible to send it by e-mail. All papers are sent to you by post, as registered mail, you go, collect, and sign that you got the envelope in question." (FGD Craiova, Women, 55-64 years)

"If you send it by post, you know it's safe." (FGD Bacău, Mixed, 65+ years)

"I say that the Romanian Mail Service is safer. Safer, but slower." (FGD Craiova, Men, 65+ years)

"So, Prioripost has the best rates for express courier services in Romania and total efficiency. Prioripost offers precisely everything there is available at the moment on the courier market in Romania, including DHL (which DHL I consider the best courier service in Romania, for express courier services). My question and my surprise refer to something else: why doesn't the Romanian Mail Service use the same structure as Prioripost, this I can't understand..." (FGD Bacău, Men, 45-55 years)



Verbatims



"Where I live, the postman is very reliable and comes every morning no matter what, whether it's raining, or snowing, or sunny, he always comes and delivers. When he's not here, he sends somebody else to replace him." (FGD Craiova, Men, 65+ years)

"The Romanian Mail Service covers, that is, it has post offices in every town, every village, and there are some places (in the rural area) that even have 2-3 post offices, depending on the size. From this perspective, the Romanian Mail Service is netly superior." (FGD Bacău, Men, 25-35 years)

"The villages that are smaller and cannot pay their debts, somebody has to pay the employees, the utility bills. It's the same for the post, even though we are scattered and few (...). We'd be good for nothing without a functioning post coming to the homes of old people who are not able to go out themselves." (FGD Bordești, Rural, Mixed, 55+)



The Romanian Mail Service

Rational image—Negative aspects

In terms of **negative aspects**, the image of the **Romanian Mail Service** was damaged by the following issues:

- ❌ **decrease of the number of post offices** – some were shut down, some of the remaining ones were reduced (in terms of space), thus leading to overcrowding, never-ending queues, in particular during rush hours. Moreover, some post offices are not able to provide all types of services to the customers, and in some provincial towns this is a serious issue, because the users are forced to travel long distances to the post office responsible for certain services (money transfers, international mail etc.). In the rural areas, there are places without a post office, and some even lack a mail carrier.
- ❌ **“outdated” offices/post offices** – there haven’t been financial investments, therefore in some offices there is old furniture, dampness, obsolete equipment.
- ❌ **services that can’t keep up with current times, which are frozen in time**
- ❌ **Personnel layoffs-** the post counters are understaffed, which also leads to the overcrowding of the offices (in particular during rush hours or around the dates for the collection of pensions/children allowances)
- ❌ **Unfriendly personnel-** the layoffs also lead to the ill-temper of the personnel, overwhelmed by multiple tasks



The Romanian Mail Service

Rational Image– Negative aspects

- ✘ **personnel “overtaken by technology”** – they have problems in using the computers, and have only recently become acquainted with this system
- ✘ **lack of protection for the personnel** – mail carriers doing routes have no assurance that they will arrive safely / with the money bag at their destination, they have no security
- ✘ **lack of cash registers** which makes it impossible to receive a receipt for certain non-mail products – envelopes, stamps
- ✘ **deficient organisation** – there are no clear indications showing at which particular counter one must wait for certain services, and there is a risk of useless queuing. Also, at the parcel storage facility the waiting times for users are very long, because the employees have to check every parcel manually until they find the right one.
- ✘ **weight limits for parcels**
- ✘ **parcels can be deposited / collected only at post offices** – this is inconvenient especially for users in rural areas, where post offices were shut down and the distance to the post office where the parcel can be collected is long
- ✘ **lack of communication on behalf of the Post concerning its own products/services, leading to people not being aware of certain products** (ex: Prioripost and home delivery/collection)



Verbatims



"The post offices have become crowded. There's so much queuing for one stamp, for anything, you have to wait until you get sick." (FGD Bucharest, Men, 55-64 years).

"It used to be close, but now we have to go somewhere downtown. [...] There are others, but very few. There are only 3 in all of Craiova. Only 3 locations." (FGD Craiova, Men, 65+ years)

"Here, for example, if you want to receive an international parcel, you have to go to the Railway Station, and when you go there, they tell you it is not the right post office and you have to go to the one three streets away." (FGD Craiova, Men, 16-24 years)

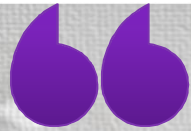
"This also happened in Căndești, when agencies were shut down and only the mail carriers were left. I suppose this is true for many other places as well." (FGD Căndești, rural, Women, 35-54 years)

"What I don't like is that, at the moment when I go in, the first counters are full of papers and files. I wish it would disappear, I wish they had computers, it's very disagreeable." (FGD Bacău, Men, 25-35 years)

"I've seen many post locations and they remained just as I knew them as a child. The office has not been improved at all.(...) there haven't been any investments, no funds for the restoration and reinforcement of the spaces." (FGD Căndești, rural, Women, 35-54 years)



Verbatims



"The services are outdated and follow communist principles. This is the biggest problem, that they were not modernized at all." (FGD Bacău, Men, 25-35 years)

"There's a bit of primitivism in this work at the Post office, it keeps from long ago.." (FGD Bacău, Mixed, 65+ years)

"The reluctance of the Romanian Mail Service to everything that is new, and I believe that in the future it will disappear.(...) Form experience, I tell you that what happens today in the Mail Service was happening in precisely the same manner 10 years ago. There is absolutely no difference." (FGD Tâmbioiești, rural, Mixed, 16-34 years)

"They had layoffs and instead of 5 persons at the counter, there are only 2-3. Angry all time, because they are alone. " (FGD Bucharest, Women, 35-44 years)

"Anyway, the personnel has been reduced more and more, and they slowly, slowly disappear, which is quite hard.(...). But with the emergence of cards (...) I understood one job is restructured. And it's not going to be pleasant. At least in our village, because of low salaries, I understood that those who used to work resigned. And it's very difficult (...) In the city they no longer use these services and that's why the jobs were reduced, but the city is one thing, and the rural area is another." (FGD Căndești, rural, Women, 35-54 years)

"You can see on their faces that they are tired, they don't even have time for lunch, poor guys. I saw that they don't have time to breathe." (FGD Bucharest, Women, 45 - 54 years)



Verbatims

"For example, you go the Post and, I don't know, you wait in line a lot, they have no experience yet, have no equipment, have some computers which crash when you least need it, the whole system breaks down. They still use those matrix printers." (FGD Bucharest, Women, 45 -54 years)

"Mail carriers often had their bags stolen. They are afraid to go alone on the streets. (...) He comes alone, but he's afraid, because he has some money there.(...) They should have somebody watching over them." (FGD Craiova, Women, 55-64 years)

"And you also sometimes get the nice surprise to go there to pay some bills, and they just say: sorry, our system is down." (FGD Bucharest, Mixed, 16-24 years)

"On the other hand, other deficiencies of the Romanian Mail Service as compared to the others, they apply some very dubious weight limitation, which is mostly due to the fact that most employees are women and I think they set the size for parcels depending on what those women can carry." (FGD Bacău, Men, 45-55 years)

"I for one don't like to go 2 km in order to receive a parcel, to bring it home. Some times in my hands, sometimes on the bicycle. They should come and bring the mail and all that is received home.(...) The elderly have medicinal products they must receive and for that they have to go 2 km." (FGD Căndești, rural, Women, 35-54 years)

The Romanian Mail Service

Emotional Image

The Romanian Mail Service has an outdated and conservative image in the mind of users, and is perceived as being:

- ❑ A mature woman, older than 50
- ❑ Has life experience
- ❑ Is well known in society, has a respectable presence
- ❑ The studies it has are no longer well adapting to the requirements of modern society
- ❑ It is conservatory, reticent, and does not wish to embrace new ideas
- ❑ Is rigid and cold towards the others, and does not communicate a lot
- ❑ Does not place much value on efficiency, it wastes a lot of time doing certain things.
- ❑ Is not able to handle technological means very well, it prefers the version *"paper and pen in hand"*



Even though there is a crowded and dynamic market, only certain suppliers have succeeded in creating visibility - Cargus (in partnership with Urgent Curier), Fan Curier, Total Post, DHL.

To these suppliers, suppliers with double specialisation are added: transport of passengers and transport of cargo (in particular internationally) - Atlassib, but also some "no name" suppliers, who also make international routes but are only known at local level (in particular in rural areas, where the rate of migration is increasing).

The image of private postal services in the private sector is universal, and several shared characteristics/attributes are associated with them:

Fastness

Efficient and fast services

Well-trained personnel

Employees who successfully fulfil their tasks, who know what they have to do

Good organisation and logistics

may be

Communication with the customer

person

AWB

Vehicle fleet



The image of private suppliers of postal services



RATIONAL

Reliability – positive experiences with respect to sending parcels, in particular envelopes containing official documents.

EMOTIONAL

Man, mature
Good manager, organised
Works in IT



RATIONAL

Company focused especially on international deliveries
Organizează different events in order to create visibility (e.g., marathons)
High prices for international mail

EMOTIONAL

30 year old male
Has a neat appearance, cares about his image and spends a lot of money for this purpose.
Dressed elegantly, with a suit. Austere, distant



RATIONAL

Recognized for working with customers in the legal/commercial field – exchange of documents between them, which creates the image of a reliable, trustworthy supplier
Recognized for delivering orders placed online

EMOTIONAL

Young, sociable, polite with the others
Trustworthy
Ambitious, seeks progress, very dynamic, in constant moving



RATIONAL

Company with double specialization – transport of passengers and parcels
Coverage throughout Europe
In order to place/collect a parcel, users must go to one of Atlassib offices.
After placing the parcel, the communication is maintained with the recipient.

EMOTIONAL

Mature man, over 50, quiet, “calculated”
Makes all possible efforts to please those around him.
Good communicator
Fair and kind

Conclusions and Recommendations

03

Conclusions and Recommendations



Considering that the Romanian Mail Service has an outdated image in the mind of users (same as other state institutions), in order to adapt itself better to the needs of the customers and to face the challenges created by the modern society, certain changes can be made:

- ❑ **Improvement of technology** –in order to make the transit from matrix printers to more efficient, modern printers
- ❑ **New, trained personnel**- younger employees, with PC-use abilities, which might make queuing more efficient.
- ❑ **Additional personnel** – more employees working on counters, and also supplementing the number of mail carriers in rural areas
- ❑ **Delivery/collection from the place of residence/place of work** – providing services as flexible as those provided by private suppliers
- ❑ **Creating new policies of management of the relations with clients** – from the manner in which customers are treated at the counter to maintaining communication with them and informing them with respect to the status of their mail
- ❑ **Communicating important products with respect to the association novelty/modernity**– example PrioriPost with all its benefits, services of collecting/delivery the parcel at home etc.

Conclusions and Recommendations



Speed of mail delivery

How it is defined?

- The time in which mail arrives from the sender to the recipient
- The speed of delivery is defined in general by taking into account: urgency of mail, time of depositing, place of sending, distance, type of service used etc.

How it is at the present?

- The Romanian Mail Service does not communicate the official durations of mail delivery (information is provided only upon request)
- The durations mentioned are related to the experience of each user
- The speed of delivery of mail sent with the Romanian Mail Service is longer, but costs less

How it should be?

- Delivery should keep up with the modern user – it must be very fast
- The fastest: 12 hours, the slower; 48 hours (at national level)
- Terms differentiated depending on the distance of delivery (for national deliveries, minimum time acceptable by users for urgent mail: 12 h- 48 h; minimum time accepted by the users for mail that is not urgent: 3-7 days; for deliveries within EU: 4 -7 days)

Frequency of mail collection

How it is defined?

- Collection of mail by the supplier from the sender
- Taking it from the supplier to the post office in order to send to the recipient

How it is at the present?

- Users don't know how many times mail is collected by the post offices, as they don't have access to this information.

Conclusions and Recommendations



How it should be?

- Collection by the supplier from the sender should be allowed to take place at any time during the work hours
- Collection by the supplier from postal offices in order to send to sender should be carried out 2 times a day, 6 days a week

Frequency of delivery for postal and non-postal mail

How it is defined?

- The frequency with which mail is delivered to the destination (home, work place)
- The frequency with which mail is delivered by the supplier to the postal offices or to the supplier's offices

How it is at the present?

- Similar to the situation of frequency of collection (the frequency of delivery and frequency of collection are similarly decoded criteria), users don't know to many details

How it should be?

- The frequency of delivering (no matter the reference category) to the destination is preferred to be throughout the duration of the work hours, or whenever it is necessary

Access to postal subunits that have working hours with the public and their working schedule and, respectively, access to post-office boxes and the schedule for emptying them

How it is defined?

- **Access to offices:** the distance between offices and users; density of postal offices
- **Working hours:** the interval in which the postal offices are open and postal services are available

Conclusions and Recommendations



How it is at the present?

- **Access to postal offices:** the number of offices of the Romanian Mail Service has decreased in the last years. Not all offices provide the same services (for example, international parcels). In the rural area, there are communities that no longer have post offices, only improvised locations
- **Access to post-office boxes:** In general, these are not used because of reduced frequency of collection and the uncertainty with regard to deposited mail.
- **Working hours:** in the urban areas, the working hours differ from one post office to another (08:00-19/20:00; 08-16/17:00). In the rural area, it is extended according to the needs.

How it should be?

- There should be post offices in every community/area of proximity to the house (10-15 min.)
- The schedule should be extended to 20:00 hrs, or there should be 2 shifts
- It is also desired to create a call center and one for poste restante.

Place (permanent address of sender, post-office box, poste restante etc.) and the moment of delivery

How it is defined?

- Defined by the participants as the locations where mail is collected and delivered

How it is at the present?

- The service of home collection/delivery provided by the Romanian Mail Service is not known by the users

How it should be?

- Better flexibility of the delivery services provided by the Romanian Mail Service
- Better communication with the employees in order to monitor mail
- Possibility to change the location of delivery

Conclusions and Recommendations



Rates charged for postal services (uniform rates/ differentiated by destination, level of rates etc.)

How it is defined?

- Rates are decoded only in correlation with the benefits of the service requested and the particular situation of the mail.

How it is at the present?

- The Romanian Mail Service offers the most advantageous rates for the services it provides – rates are significantly lower than those applied by private suppliers
- In certain situations, rates for certain services are higher than the value of the product
- There is a tendency (in case of urban population) to accept higher rates for higher quality of services (reduced bureaucracy, more employees)

How it should be?

- In general, preferences converge towards uniformization of rates, only in special cases, rates should be optimized (when the value of the product is smaller than the rate for the service).

Coverage of postal network

How it is defined?

- All the places from where and to where mail can be sent and received

How it is at the present?

- The Romanian Mail Service is perceived as having the best coverage at national level (in rural and urban areas)

How it should be?

- For better coverage, it would be desirable to have more offices (in particular in rural areas, where they were shut down) and more mail carriers

Conclusions and Recommendations



Users' preferences with regard to the quality of the services provided (timely delivery, number of lost mail etc.)

How it is defined?

- It is translated in many aspects related both to image, as well as to services provided: from the methods used for the storage / transportation of mail, behaviour and flexibility of employees, company's care for its employees, to the reliability of the services provided and observance of timing

How it is at the present?

- **The Romanian Mail Service:**
 - Struggles with deficiencies in particular with respect to its image attributes: behaviour and flexibility of employees, the company's care for its employees (apathetic employees, overtaken by technology, limited)
 - With respect to the reliability of its services – the observance of timing is not a strong point
 - There is, however, a higher degree of trust with respect to the mail storage and transport conditions.
- **Private providers** are appreciated for the high quality of their services, perceived deficiency are those related to the diversity of services provided (at the moment, focused mostly on parcel/envelope deliveries) and higher prices.

How it should be?

- More service flexibility (location of collecting/delivery)
- More training sessions for employees – customer focusing, amiability

Conclusions and Recommendations



With regard to the preferences of the users in relation to the manner in which postal services are provided, we mention the following:

- ☐ Modern locations
- ☐ Modern means of transportation – to guarantee the safety of packages
- ☐ Advanced technology, suitable to the services provided
- ☐ Qualified personnel
- ☐ Updated website
- ☐ Automatic machine for tax stamps
- ☐ Providing line-number tickets
- ☐ Internet posts (1, 2 computers for internet access, as paid service)
- ☐ Creating a loyalty card
- ☐ Compensation for faulty services

Conclusions and Recommendations



With regard to the new features of postal services desired by the users, we point out the following:

- ☐ Special services for perishable products and very large packages
- ☐ Packaging system for parcels
- ☐ Barcode scanning
- ☐ Checking the parcel before payment and the possibility to not accept the parcel (for the Romanian Mail Service)
- ☐ System of notification by text/phone with respect to the status of mail
- ☐ Flexibility with respect to the location/time of delivery
- ☐ Payment by credit card or online



exact[®]
right sights on insights.

Irina.Rainer@exactcc.ro - *Qualitative Research Manager*

Gabriel.Dobarceanu@exactcc.ro - *Qualitative Researcher Senior*

www.exactcc.ro