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The Use of Postal Services by Individual Users from Romania

Quantitative Research Report

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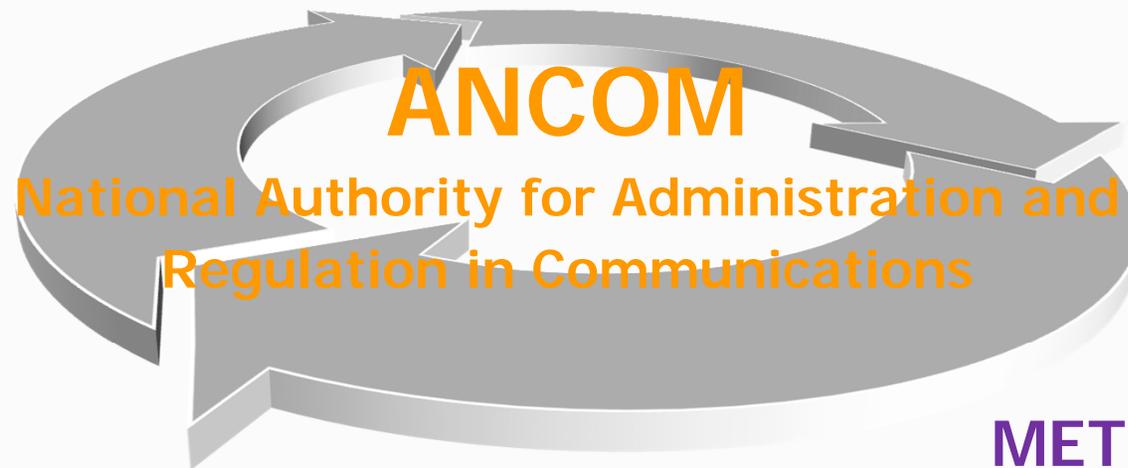
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OBJECTIVE

Identify the preferences of the users of postal services in Romania – Individual users.



METHODOLOGY

CONTEXT

The information will be used to evaluate the universal service of postal services and to identify the need to introduce new postal services.

Quantitative:

1565 questionnaires

Target population: individual users from Romania who used in the past 12 months postal services as senders and/or receivers.

Conclusions - The use of postal services

- ✓ About 6 out of 10 individual users of 16 years and older used postal services in the last year, either as recipients or as senders. The usage incidence is higher in Bucharest-Ilfov region (statistically significant difference).
- ✓ Three providers of postal services represents the core set of alternative users, both on the indicator "use in the past 12 months" and the indicator "used most often". Romanian Post (86% use in the past year), Fan Courier (65%) Urgent Cargus (36%). The difference between Romanian Post and Fan Courier, on the indicator "use in the past 12 months" is minimal in Bucharest (9%) and the highest in rural areas (34%).
- ✓ 45% users of postal services from Bucharest have spent more than 50 lei in the past year for such services.
- ✓ 72% users of postal services from urban area and 54% users of postal services from rural area are both senders and receivers. Most of the senders are responsible of both choosing the postal/courier provider and sending the letters, parcels.

Conclusion - Selection criteria for postal service providers

- ✓ The most important criteria for choosing a postal service provider are: charged tariffs, speed of delivery, insurance of deliveries, complying with delivery deadlines.
- ✓ Prices charged by suppliers are more important in the South development area and in large urban areas (100-400 thousand inhabitants). In Bucharest, delivery speed is less important, giving priority to insurance and complying with delivery deadlines.
- ✓ The most important barriers for collaboration with a certain provider of postal services are: damage or loss of postal sends, inconvenient rates (more important in the South and Bucharest), failure to comply with delivery times (most important in the South).

Conclusions – Preferences regarding the rate of delivery

- ✓ 26% of the individual users paid less than 10 lei for sending a letter in Romania and 18% paid between 10-20 lei.
- ✓ Almost half of the letter senders (45%) would pay double if the letter would arrive on the same day.
- ✓ 19% of the senders paid between 20-50 lei for sending a parcel in Romania and 14% paid between 10-20 lei.
- ✓ One third (37%) of the senders would pay double price if the package would arrive the next day.

Conclusions - Preferences regarding Frequency of collecting postal items

- ✓ Over half of the individual users that send postal items (56%) would prefer the providers to collect their postal sending from the postal offices: daily, two times per day (52%) or once per day (35%).
- ✓ 7 out of 10 senders from Bucharest (significantly more senders than from other development areas), consider that the postal items should be collected from postal offices two times per day.
- ✓ 1 out of 2 senders consider necessary (“certainly yes”) that the postal services providers to collect postal items even on Saturdays.
- ✓ The senders would prefer the postal items to be collected by a postal officer from the address they indicate (42%) or from the provider’s working place (31%).
- ✓ In Center, South-West and Rural areas can be noticed a preference for collection of the postal items from the provider’s mailbox. Bucharest residents prefer the collection done by a postal officer from the address they indicate (53%).

Conclusions - Preferences regarding Delivery of postal items

- ✓ 3 out of 4 postal service users (75%) consider would be necessary (certainly yes) that the postal services providers to inform receivers about the day and hour of the postal item delivery by phone or e-mail.
- ✓ More than half (57%) of postal service users consider necessary that the providers of postal or courier services should have the postal items delivered to their receivers on Saturday also.
- ✓ Two-thirds (68%) of the postal service users won't mind if the postal delivery would happen on 4 working days plus Saturday or Sunday and not during 5 working days. Although 22%-24% of individual users would change their postal service provider.
- ✓ Preferences for delivery hours are within the range of the entire day, mainly between 16-18h (39%). In Bucharest there is a higher preference for 18-20h (48%).
- ✓ The majority of postal services users prefer as delivery location the receiver's home address, through personal handing.

Conclusions – Working hours and the proximity of working points

- ✓ The postal service users are willing to walk an average of 17 minutes to the nearest working point of the postal or courier services provider.
- ✓ The majority of the postal service users (53%) would prefer the postal offices to start their daily working schedule between 8 and 9 AM and end it between 7 and 9 PM (31%).
- ✓ Half of the postal service users from the rural areas and small cities with less than 50.000 habitants are not willing at all (53% - not at all) to travel to another city/village in order to send or pick up a postal item. Only 1 from 3 users is willing to travel.
- ✓ 7 out of 10 people consider that is necessary to have the postal offices opened during the weekends (Saturday and Sunday) in their towns/villages.
- ✓ The majority of the postal service users (78%) believe that is necessary to have available a phone number or an option on the provider's website so they can obtain information regarding the status of their postal sending.

Conclusions- Preferences regarding the tariffs

- ✓ 8 out of 10 people that work with a private postal service provider consider that the charged tariffs are affordable (74% - have affordable tariffs & 7% - have very affordable tariffs).
- ✓ We notice among postal service users a high satisfaction regarding the value of money offered by the private postal service providers. Almost 90% from the postal service users are satisfied or very satisfied regarding the value of money offered by DHL, FAN Curier, DPD, Urgent Cargus.
- ✓ The users appreciate the charged tariffs from Romanian Post being more affordable than the ones charged by the private postal service providers (86% Romanian Post vs. 82% private postal service providers).
- ✓ The Romanian Post has obtained a lower satisfaction percentage regarding the value of money attribute in comparison with the private postal service providers (78% Romanian Post vs. 87% private postal service providers).
- ✓ 1 out of 3 postal service users appreciate as being necessary the prices differentiation depending on the delivery distance. And 1 out of 4 postal service users appreciate as being necessary the prices differentiation depending on the residence area.

Conclusions - Preferences regarding territorial coverage

- ✓ 1 out of 6 users have experienced at least once a situation where the postal service provider had no coverage in the area where they wanted to deliver postal items.
- ✓ Half of those that experienced poor territorial coverage were troubled to a large extent.
- ✓ 1 out of 4 senders experienced poor territorial coverage regarding Romanian Post and 1 out of 8 users regarding Fan Curier.
- ✓ In 82% of the cases where the postal service provider didn't have coverage, the locality was in the rural area.
- ✓ Usage of postal services offered by another postal services provider was the alternative for half the senders faced with poor territorial coverage.
- ✓ Postal services users visited postal offices 10 times in the last 12 months (on average).
- ✓ The majority of postal services users consider mandatory the following characteristics of an offer belonging to postal service providers: notification system regarding date and time of delivery, opening of the package at delivery and liability for delayed delivery.

Thank You!

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