



ANCOR

Autoritatea Națională pentru Administrare
și Reglementare în Comunicații

Quantitative Study on Usage of Postal Services amongst Romanian Residentials



confident
decisions

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Background and Objectives

Methodology

Key Findings

Awareness and Usage of Postal
Services

Postal Services Providers

Substitutability

Demographic Profile



Background and Objectives

- Mercury Research conducted between August-September 2015 a quantitative study regarding the usage of postal services amongst residentials, in Romania. The main objective of this study was to provide a set of relevant information about the usage of postal services.
- The specific objectives of the study were to identify the followings:
 - The types of postal services used over the last 12 months;
 - The demographic profile of postal services users;
 - The current postal services provider/providers whose services are used, and the criteria they are selected on;
 - The frequency of usage of postal services, on services categories;
 - The satisfaction with specific services provided by C.N.P.R. (National Company – Poșta Română), as an universal service provider;
 - The satisfaction with postal services offered by providers, other than C.N.P.R.;
 - The average spending on postal services, per year;
 - The relevant criteria for choosing a specific type of postal services, offered by a certain postal services provider;
 - Information about the previous behavior of users (if they changed their provider over the last 12 months; if so, how often; for what reasons; which were the barriers when they decided to make the replacement);
 - The intention of changing the provider/providers over the next 12 months, the reasons for changing and the barriers anticipated;
 - The users' awareness about other postal services providers, and particularly about providers from their residence area;
 - The substitutability between the postal services providers, for the same type of services;
 - The substitutability between the postal services and electronic communication services;
 - The substitutability between different types of postal services;
 - The consumption behavior of end users, in case of increased prices for the postal services they use;
 - The influence of certain socio-demographic and economic variables on the consumption behavior of the postal services users (correlations between variables).

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Methodology

Respondents profile:

Men and women over 16 years old, from urban and rural areas;
who use postal services as senders;
who are involved in the decision making regarding the acquisition and the use of postal services.

The method used for collecting data:

Computer Assisted Personal Interviews (CAPI).

Sampling methodology:

Multi-level random sampling, using the following sampling criteria: region; residence area (urban or rural), size of locality, gender, age groups.

The size and the structure of the sample:

Planned sample: 1425 interviews;

Achieved sample: 1466 interviews;

 Urban sample: 849 interviews;

 Rural sample: 617 interviews.

The detailed structure of the sample is presented in the Appendix.

Period of data collection:

August-September 2015

Results:

Results were weighted at national level, by region, type of residence area, size of locality, gender and age groups, according to the structure of the 16+ population (data source: NIS)

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Demographic Profile



Key Findings

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.

Key Findings

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).

Key Findings

Chapter II: Postal Services Providers (continued)

- > 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.

Key Findings

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.

Backgrounds and Objectives

Methodology

Key Findings

Awareness and Usage of Postal Services

Postal Services Providers

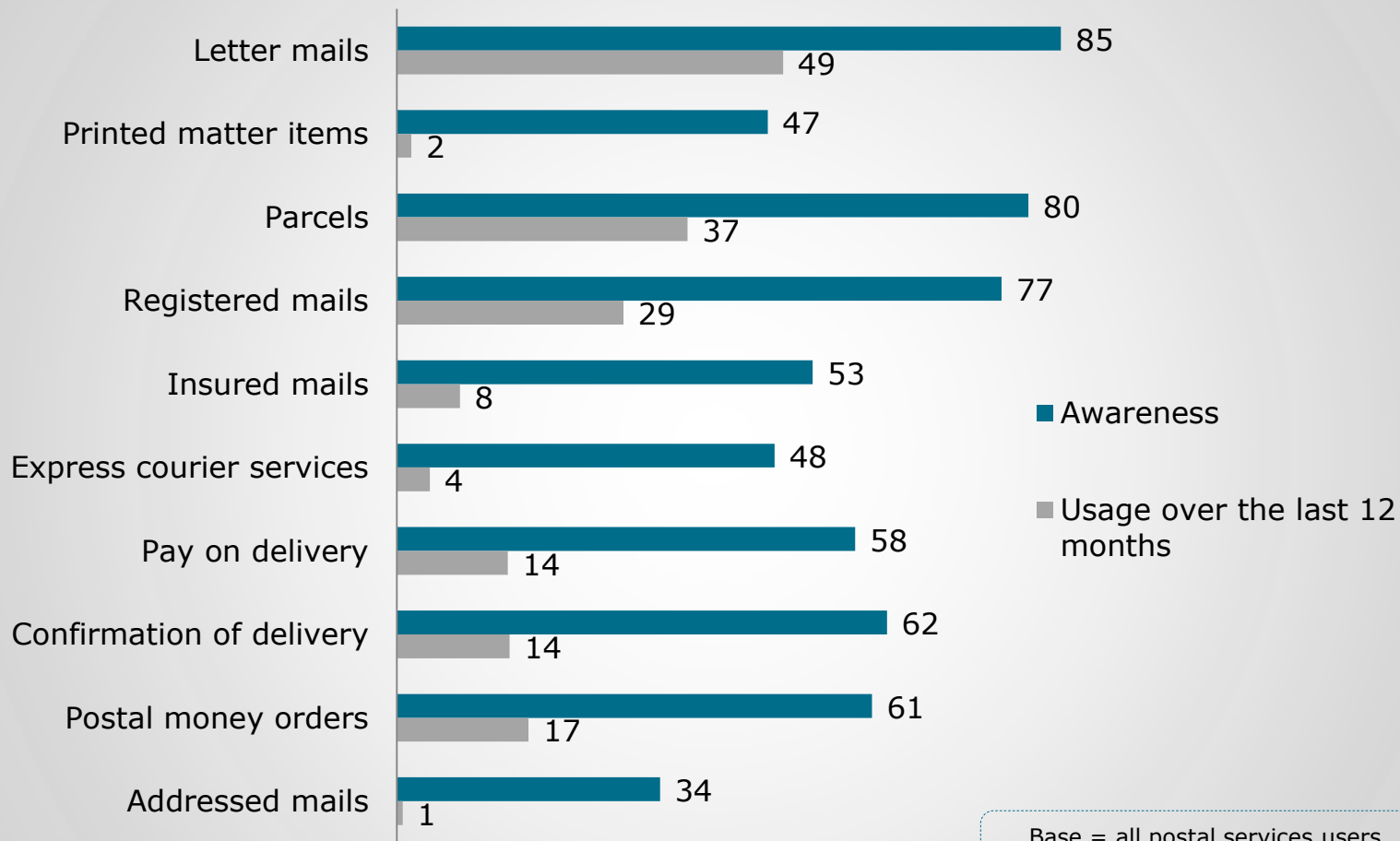
Substitutability

Demographic Profile



Awareness and Usage of Postal Services

%



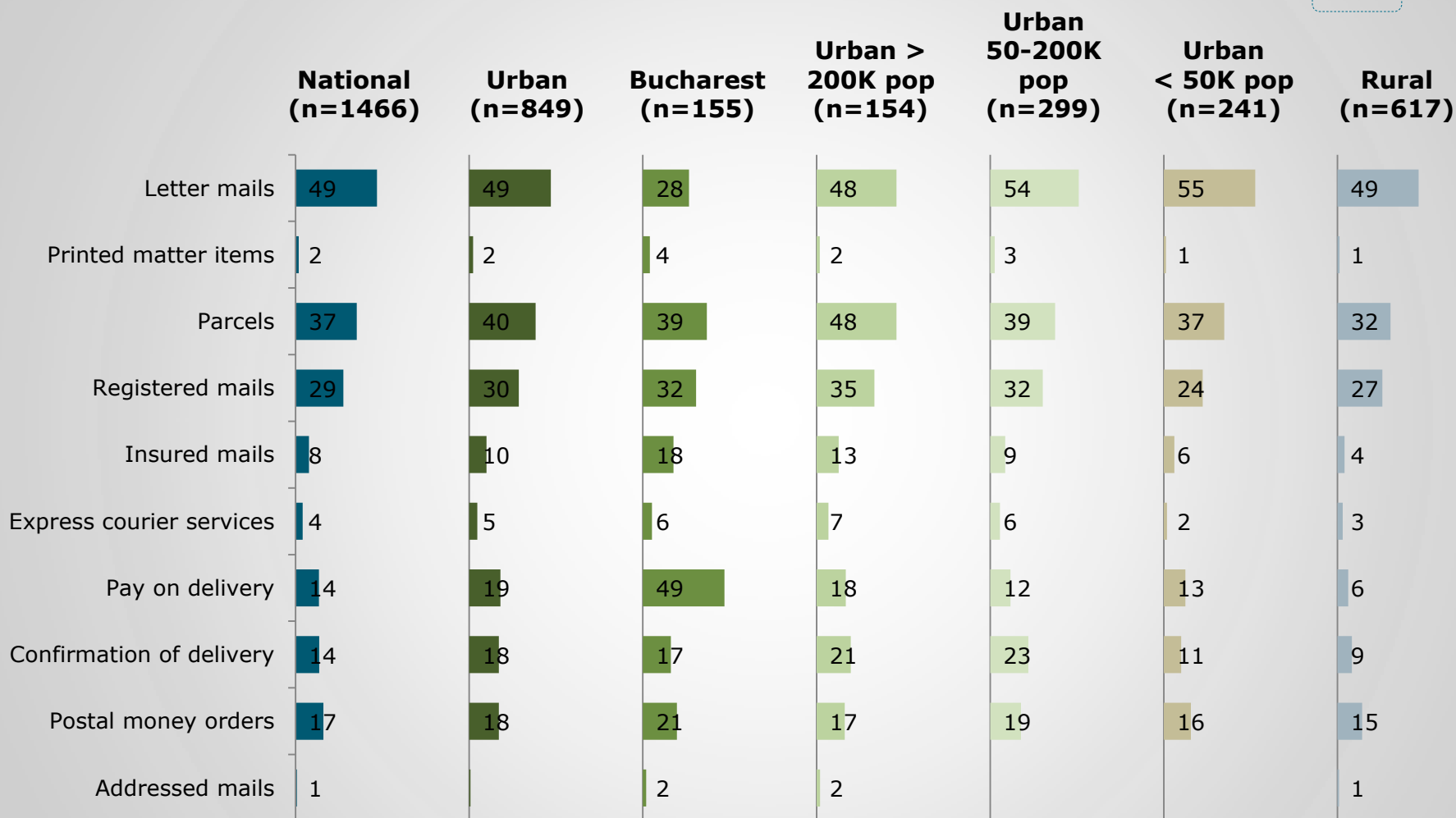
Base = all postal services users (n=1466)



U1. Which of the following postal services do you know?
 U2. And which of them did you use, as a sender, over the last 12 months? You personally, or somebody else in your household.

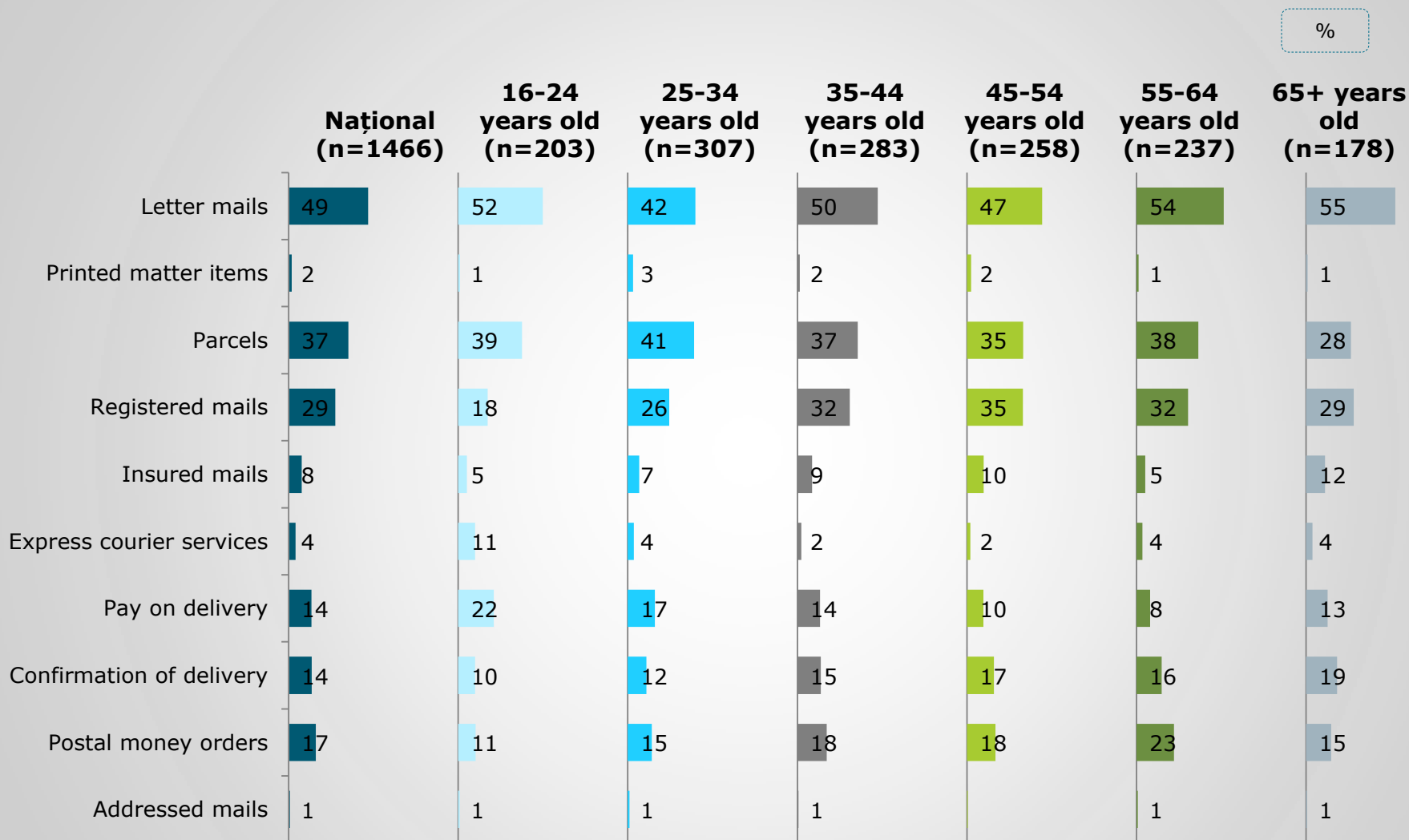
Usage of Postal Services by Residence Area and by Size of Locality

%



U2. And which of them did you use, as a sender, over the last 12 months? You personally, or somebody else in your household.

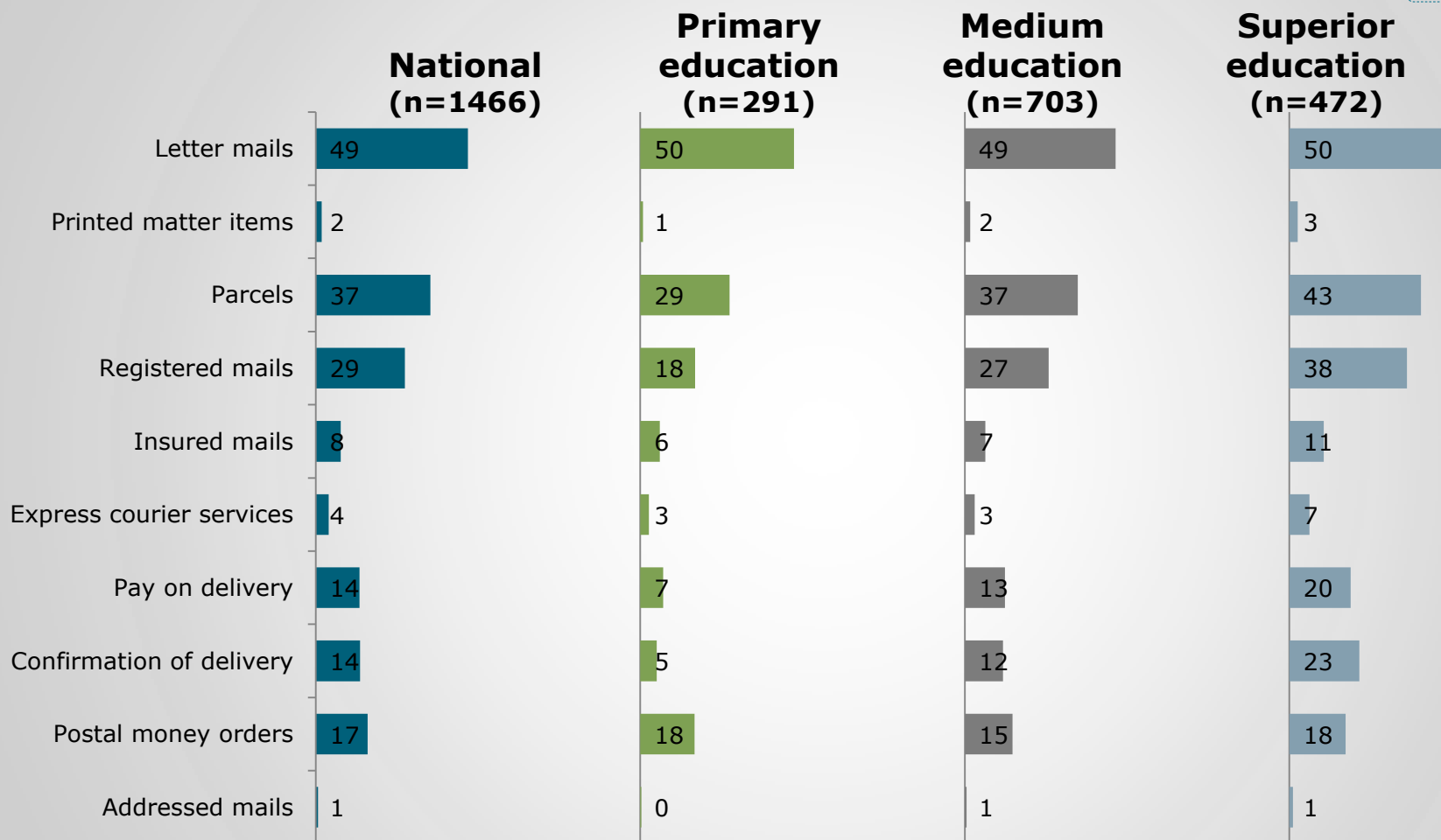
Usage of Postal Services by Age Groups



U2. And which of them did you use, as a sender, over the last 12 months? You personally, or somebody else in your household.

Usage of Postal Services by Education Levels

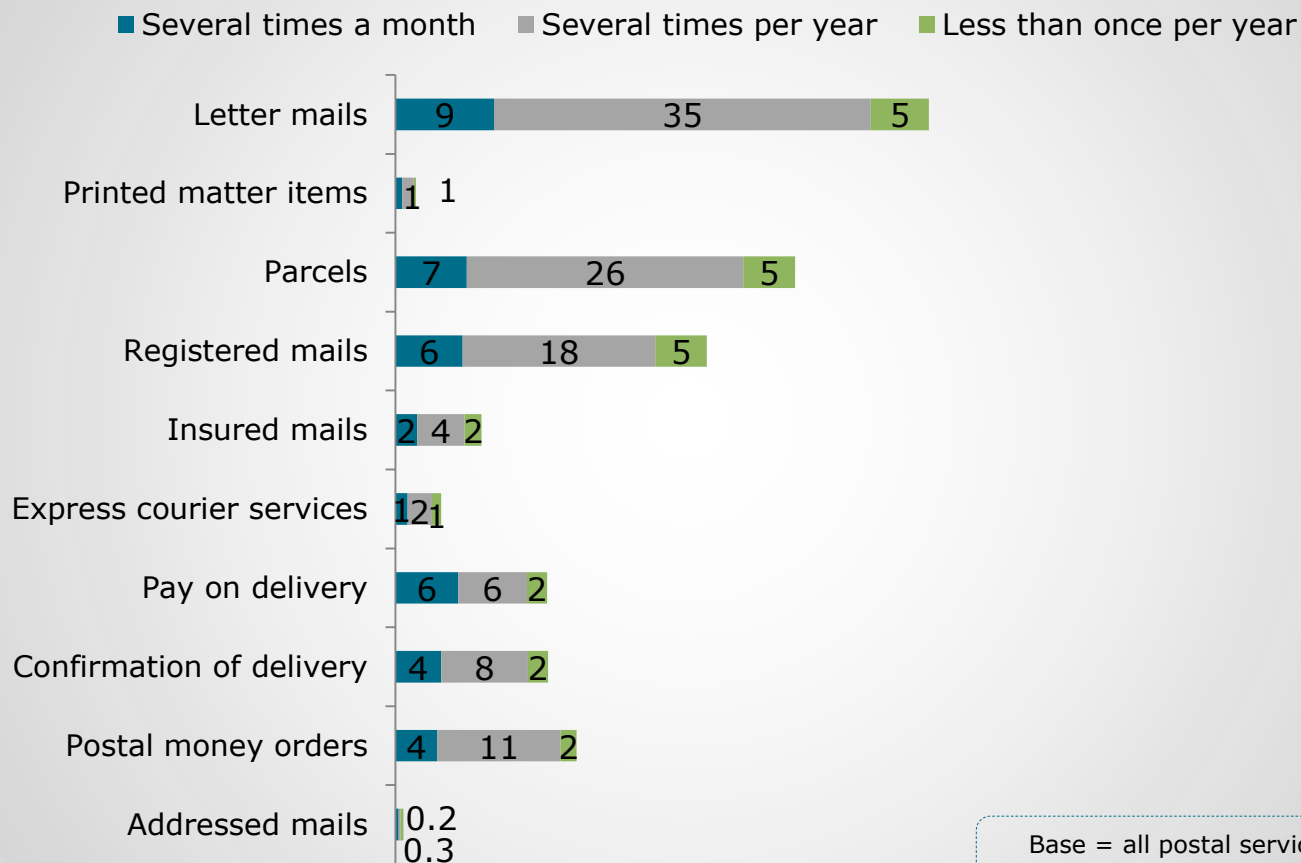
%



U2. And which of them did you use, as a sender, over the last 12 months? You personally, or somebody else in your household.

Frequency of Usage of Postal Services at National Level

%



Base = all postal services users (n=1466)

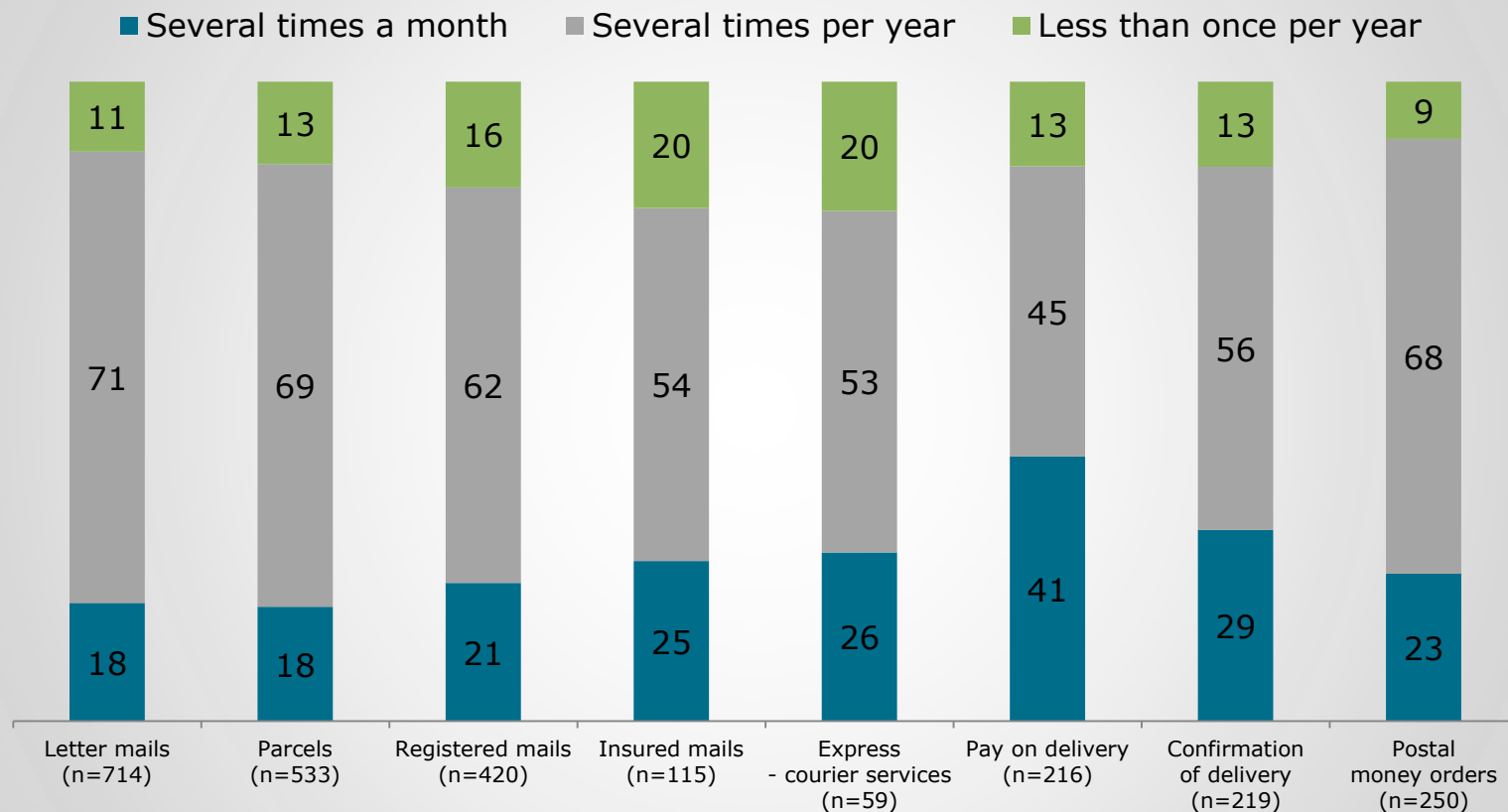


U3. How often are used by you personally, or by other persons in your household, each of the following postal services?

The difference is represented by non-users

Frequency of Usage of Postal Services amongst Users at National Level

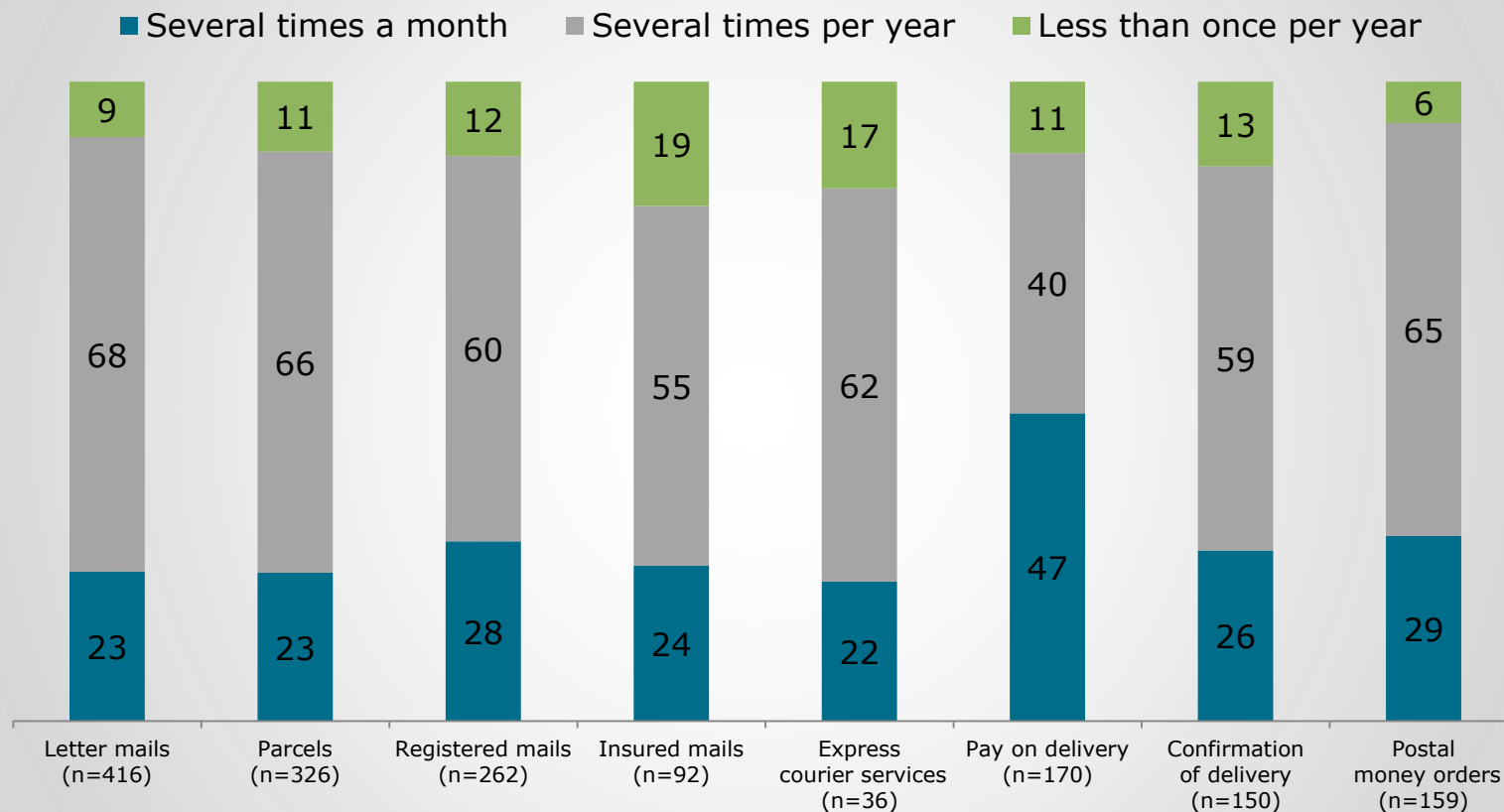
%



U3. How often are used by you personally, or by other persons in your household, each of the following postal services?

Frequency of Usage of Postal Services amongst Users at Urban Level

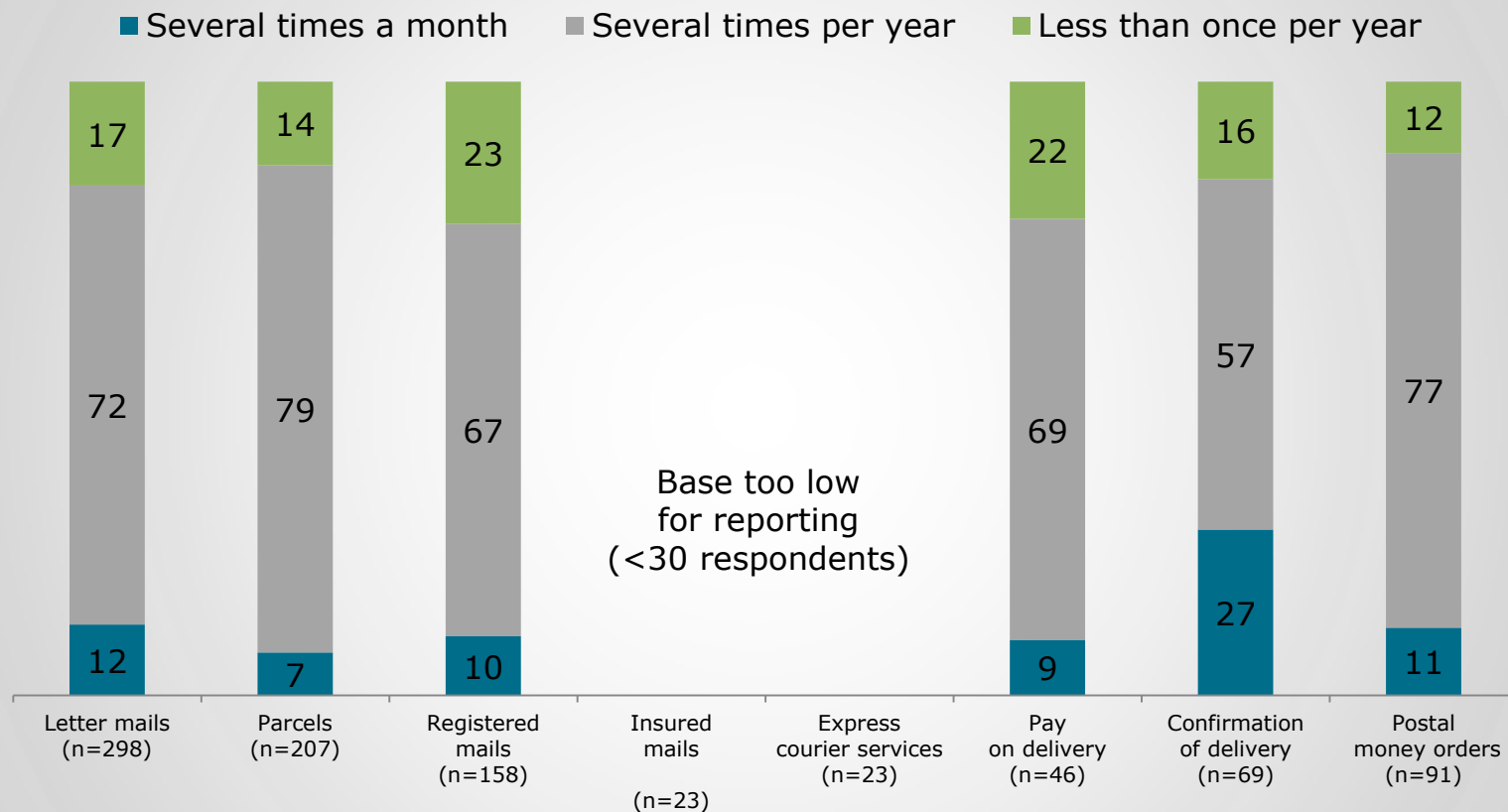
%



U3. How often are used by you personally, or by other persons in your household, each of the following postal services?

Frequency of Usage of Postal Services amongst Users at Rural Level

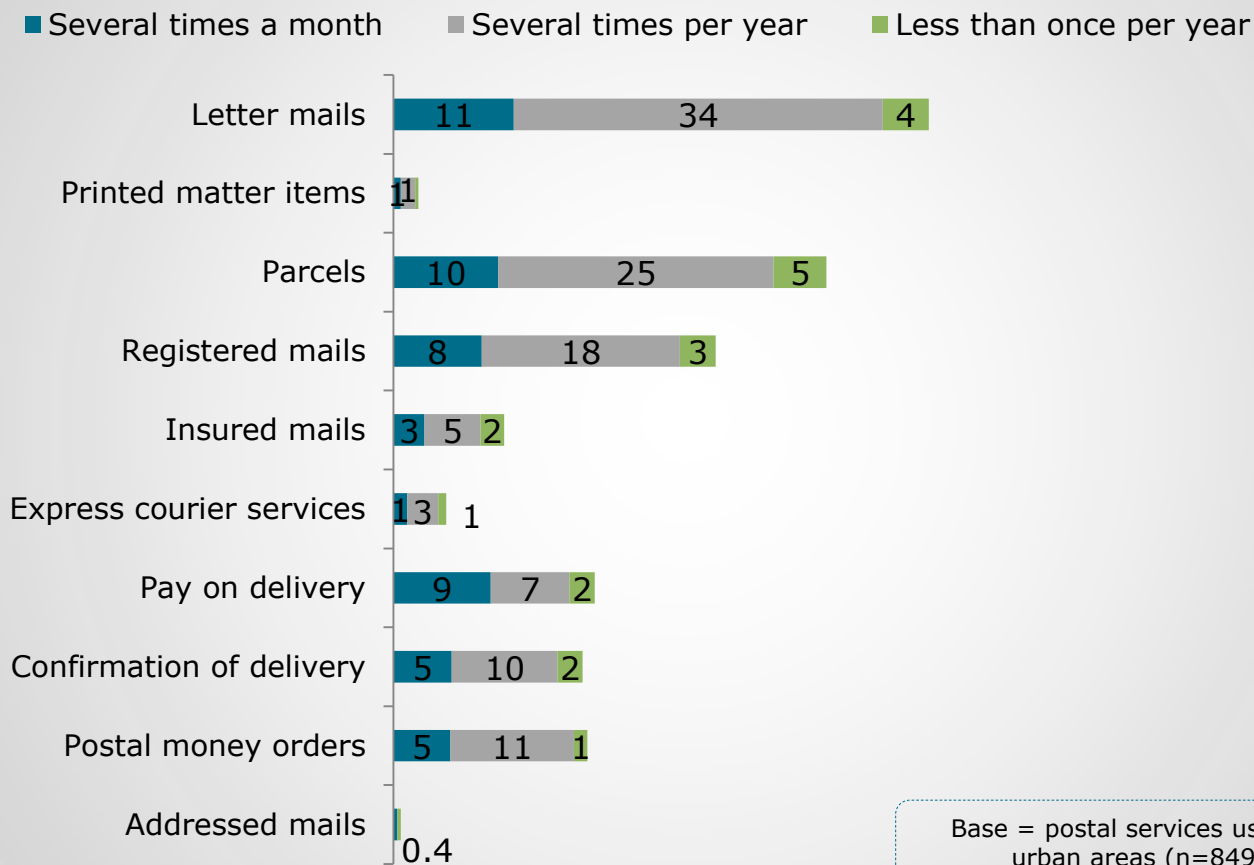
%



U3. How often are used by you personally, or by other persons in your household, each of the following postal services?

Frequency of Usage of Postal Services at Urban Level

%



Base = postal services users in urban areas (n=849)

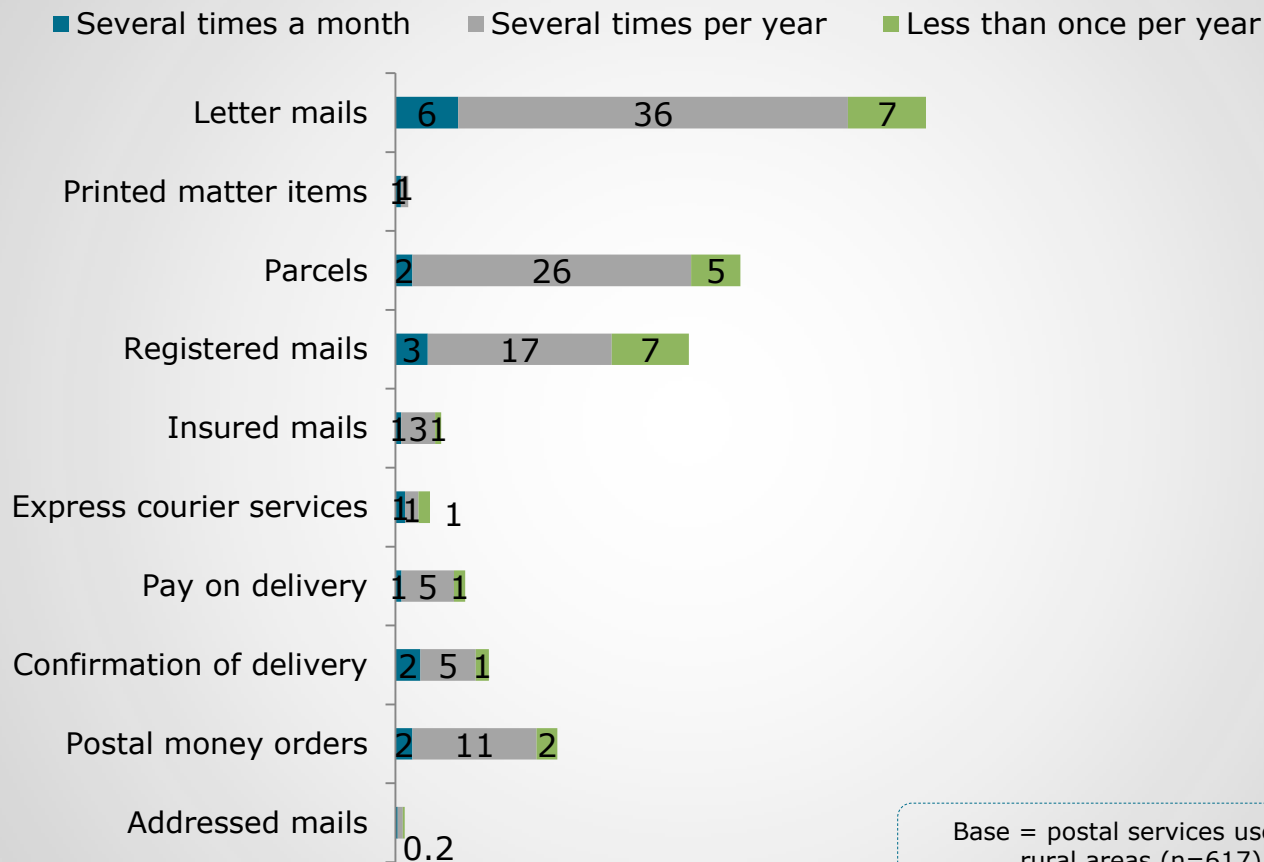


U3. How often are used by you personally, or by other persons in your household, each of the following postal services?

The difference is represented by non-users

Frequency of Usage of Postal Services at Rural Level

%



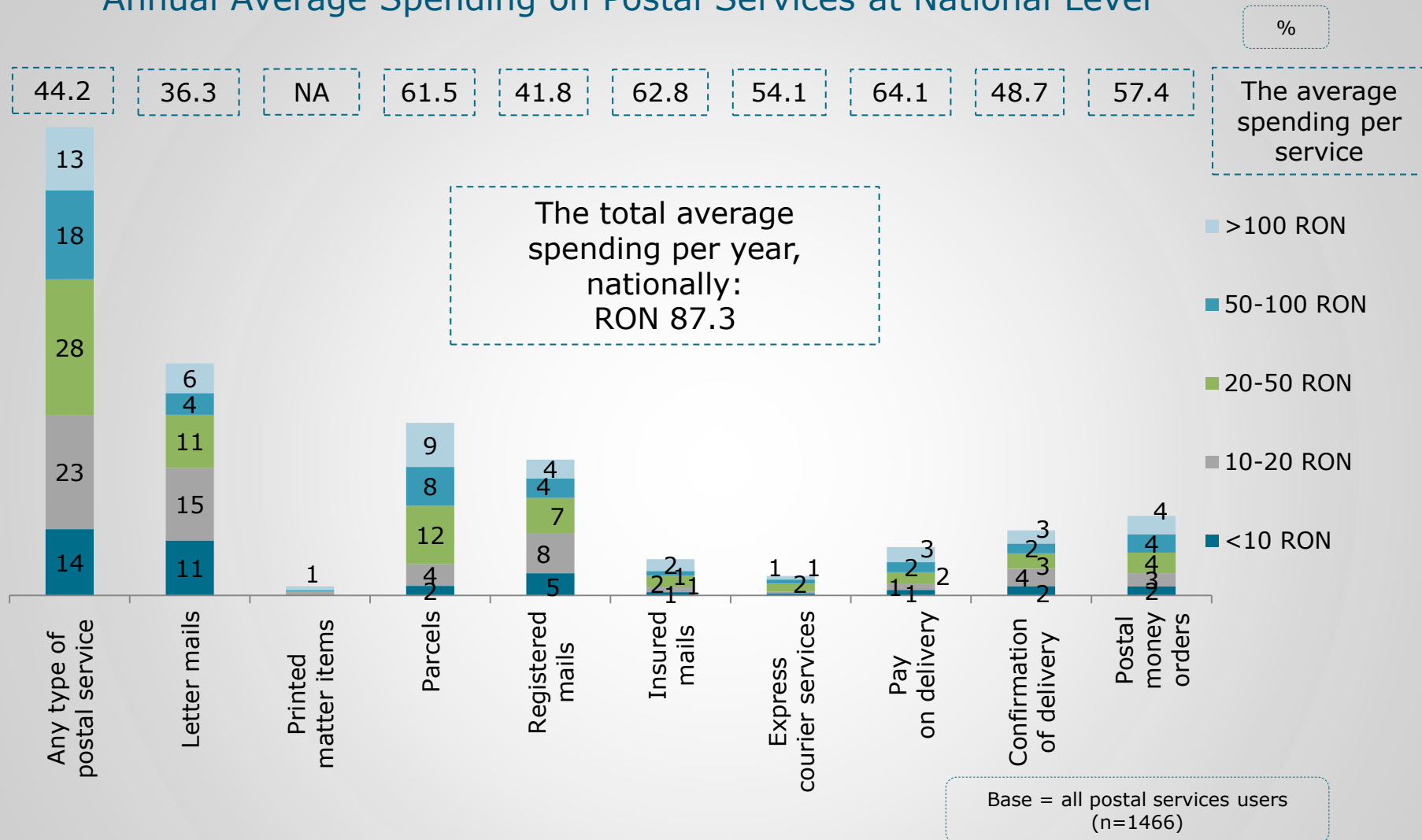
Base = postal services users in rural areas (n=617)



U3. How often are used by you personally, or by other persons in your household, each of the following postal services?

The difference is represented by non-users

Annual Average Spending on Postal Services at National Level



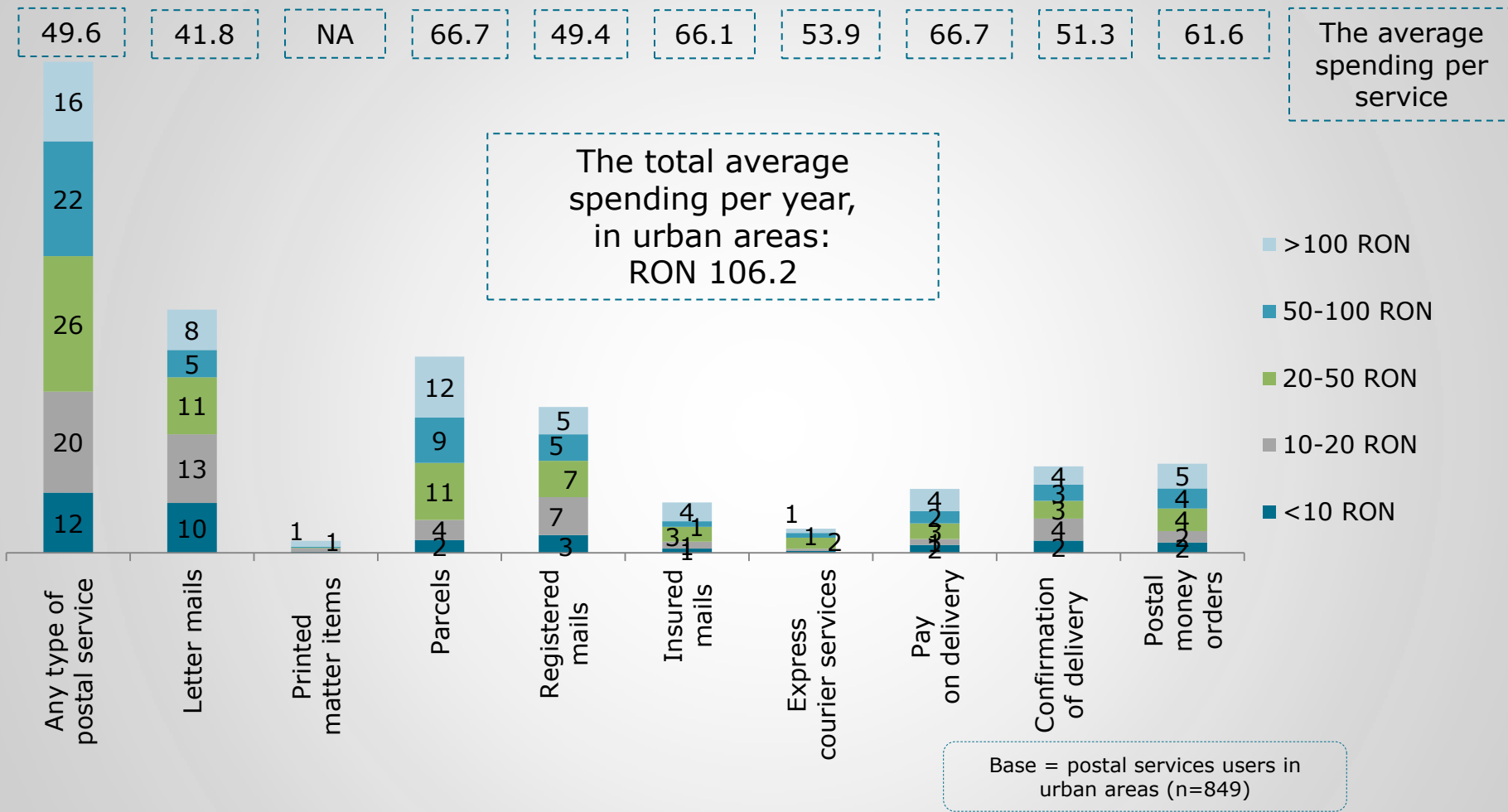
U4. On average, how much do you spend in your household, during a year, on the following postal services?

NA = base too low for determining the average value (<30 respondents)

The difference is represented by non-users

Annual Average Spending on Postal Services at Urban Level

%



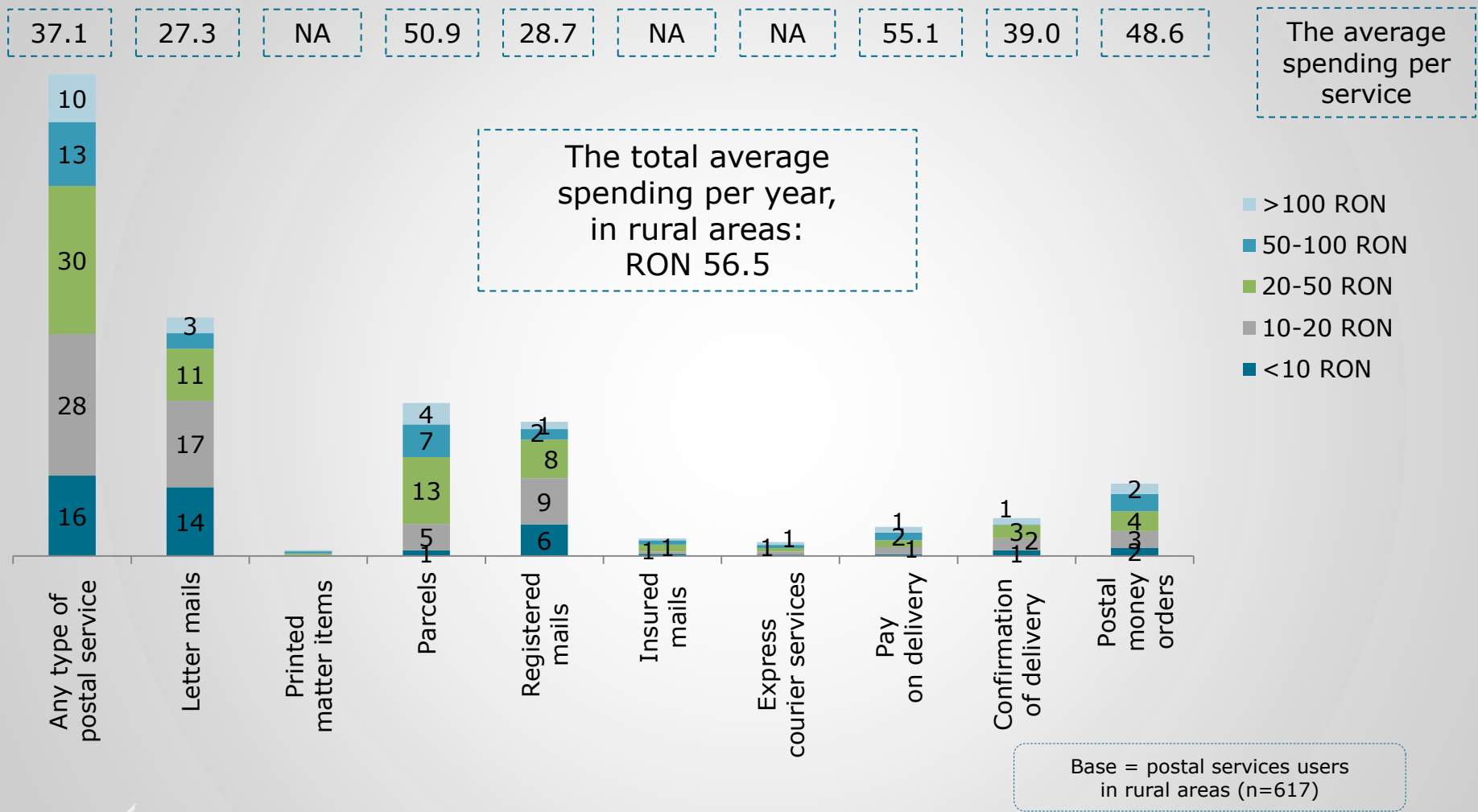
U4. On average, how much do you spend in your household, during a year, on the following postal services?

NA = base too low for determining the average value (<30 respondents)

The difference is represented by non-users

Annual Average Spending on Postal Services at Rural Level

%



U4. On average, how much do you spend in your household, during a year, on the following postal services?

NA = base too low for determining the average value (<30 respondents)

The difference is represented by non-users

Backgrounds and Goals

Methodology

Key Findings

Awareness and Usage of Postal
Services

Postal Services Providers

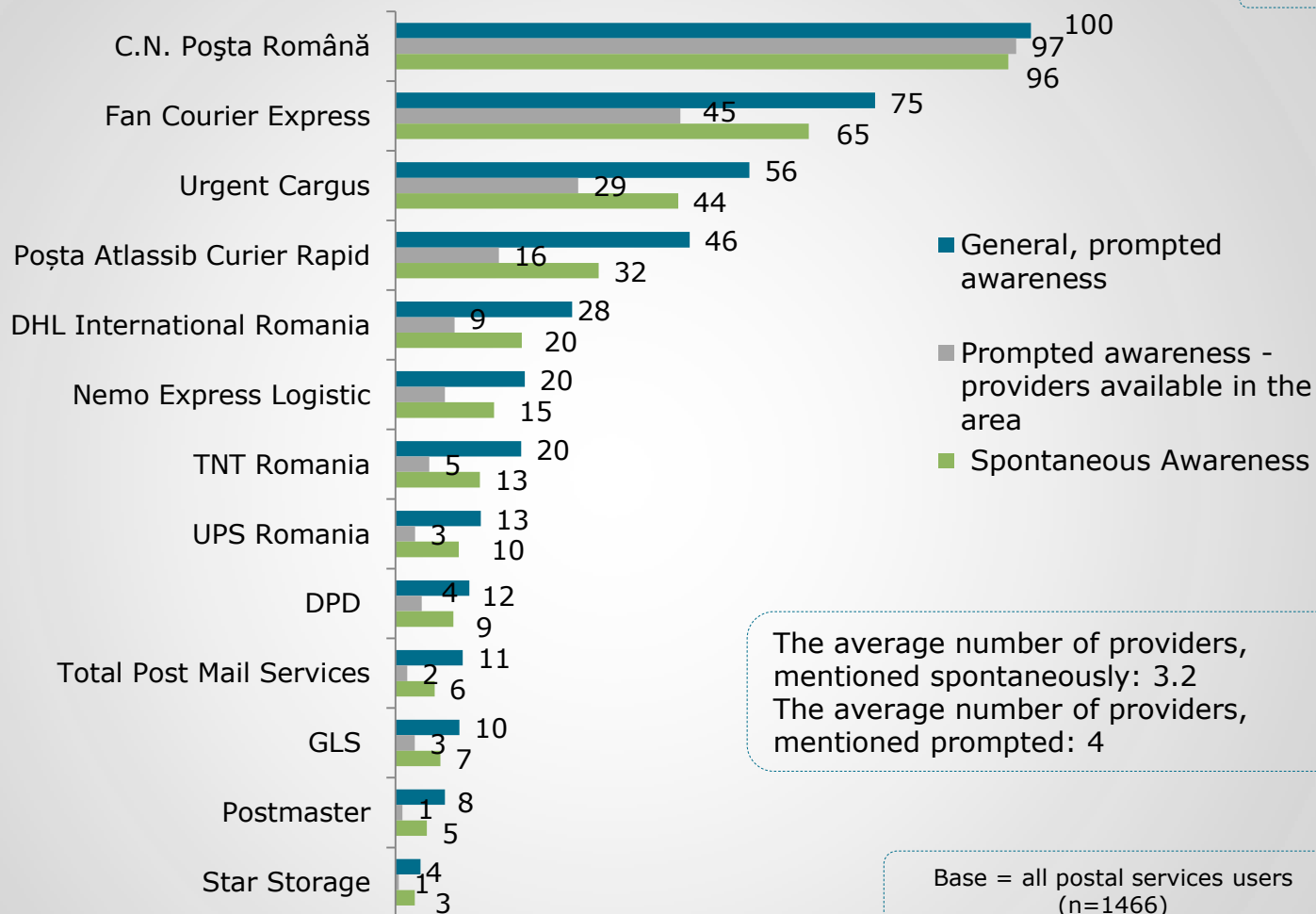
Substitutability

Demographic Profile



Awareness of Postal Services Providers at National Level

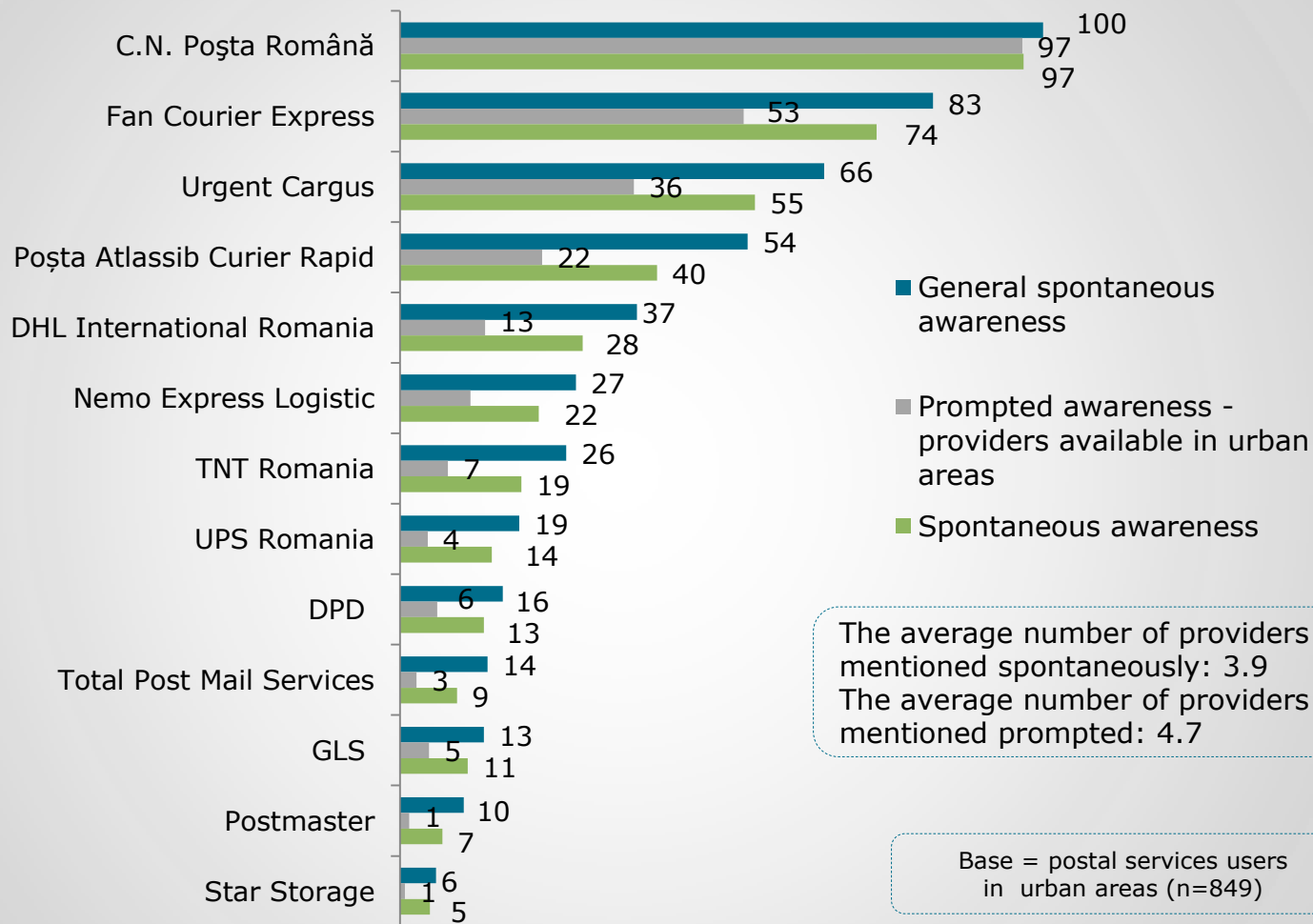
%



- F1. What postal services providers do you know, no matter if you personally used their services, or not?
 F2. Among the companies on this list, which do you know as a postal services provider?
 F3. Which of these providers offers postal services in your residential area?

Awareness of Postal Services Providers at Urban Level

%



The average number of providers mentioned spontaneously: 3.9
 The average number of providers mentioned prompted: 4.7

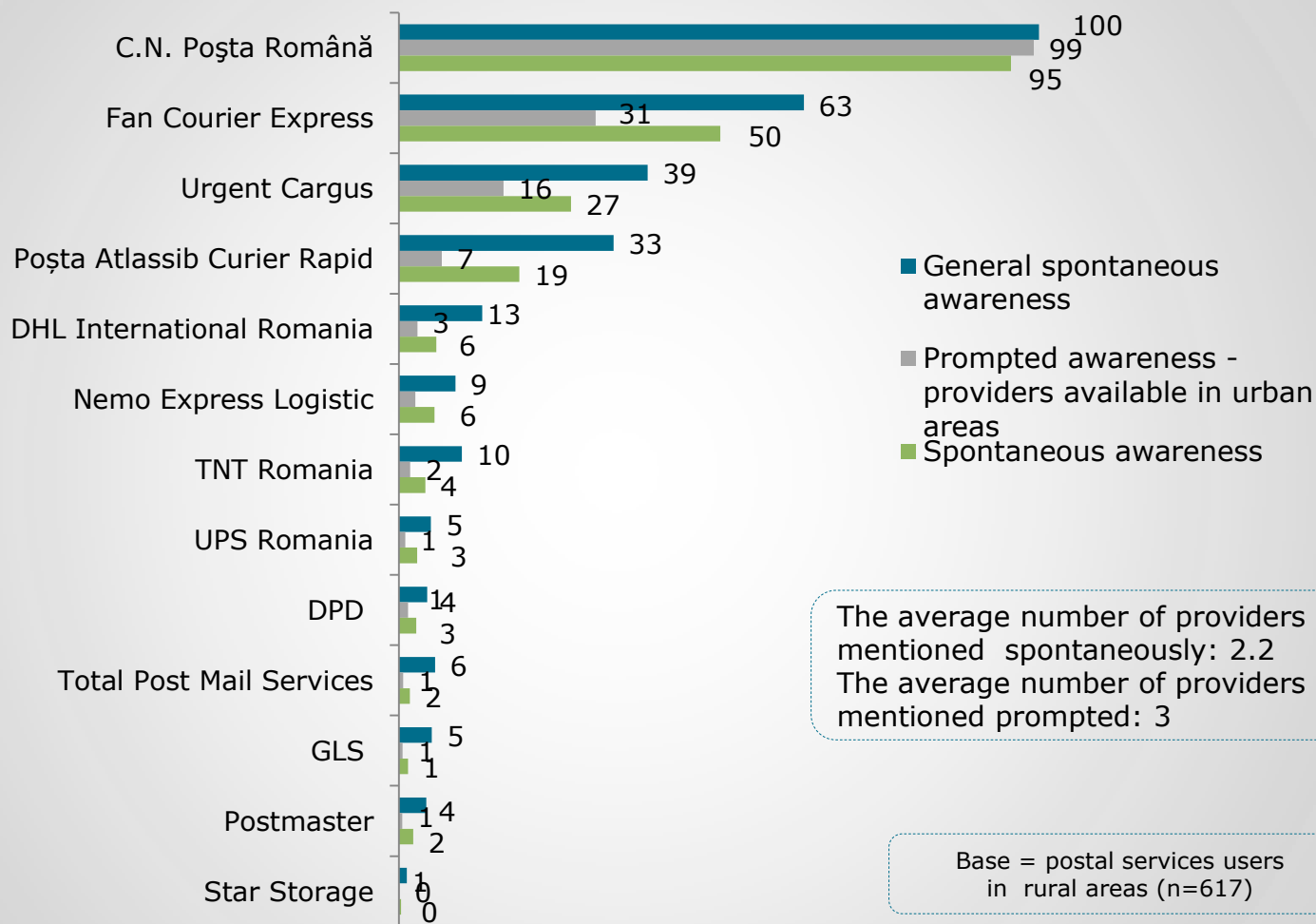
Base = postal services users in urban areas (n=849)



- F1. What postal services providers do you know, no matter if you personally used their services, or not?
- F2. Among the companies on this list, which do you know as a postal services provider?
- F3. Which of these providers offers postal services in your residential area?

Awareness of Postal Services Providers at Rural Level

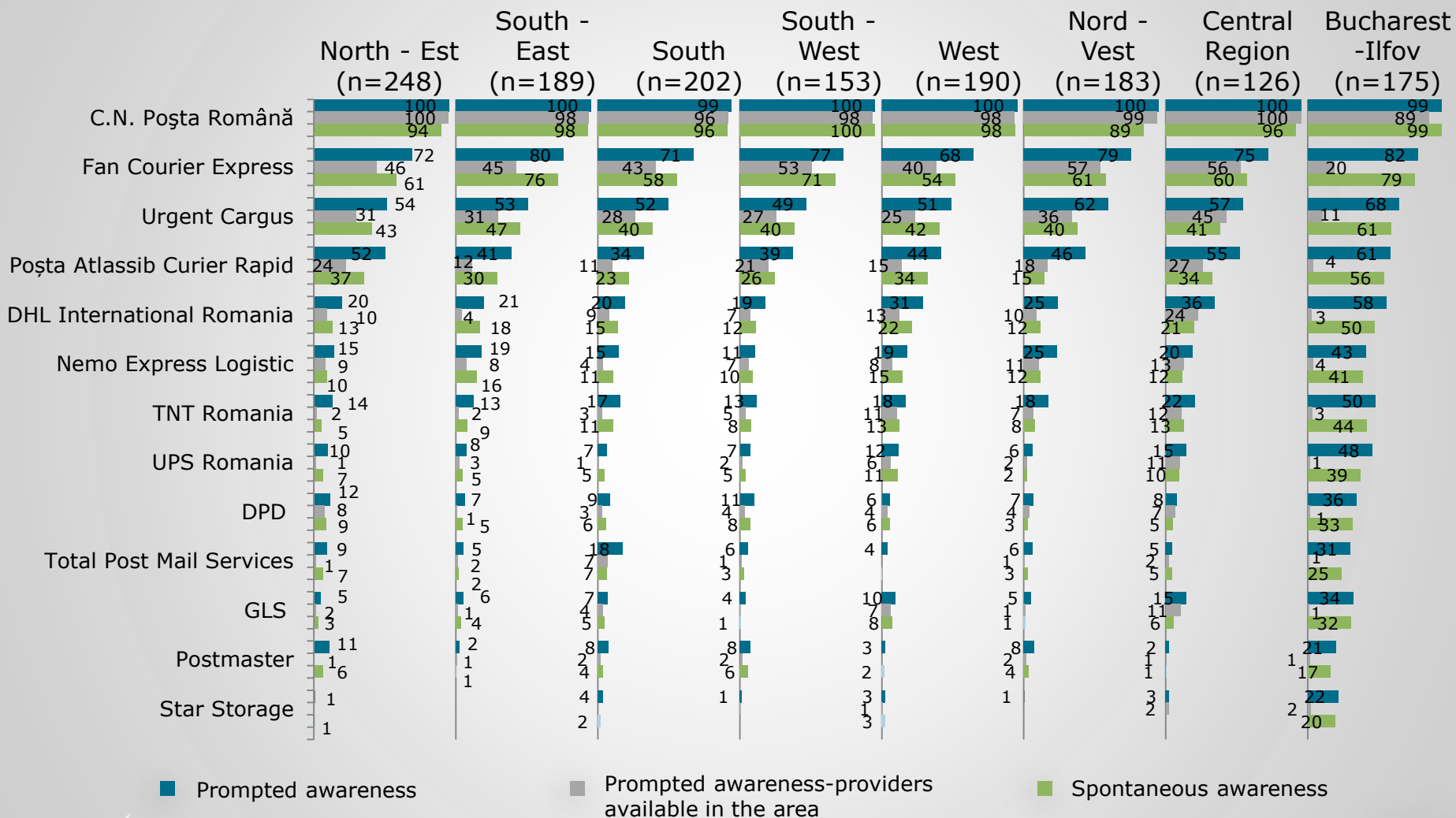
%



- F1. What postal services providers do you know, no matter if you personally used their services, or not?
- F2. Among the companies on this list, which do you know as a postal services provider?
- F3. Which of these providers offers postal services in your residential area?

Prompted Awareness of Postal Services Providers by Region

%

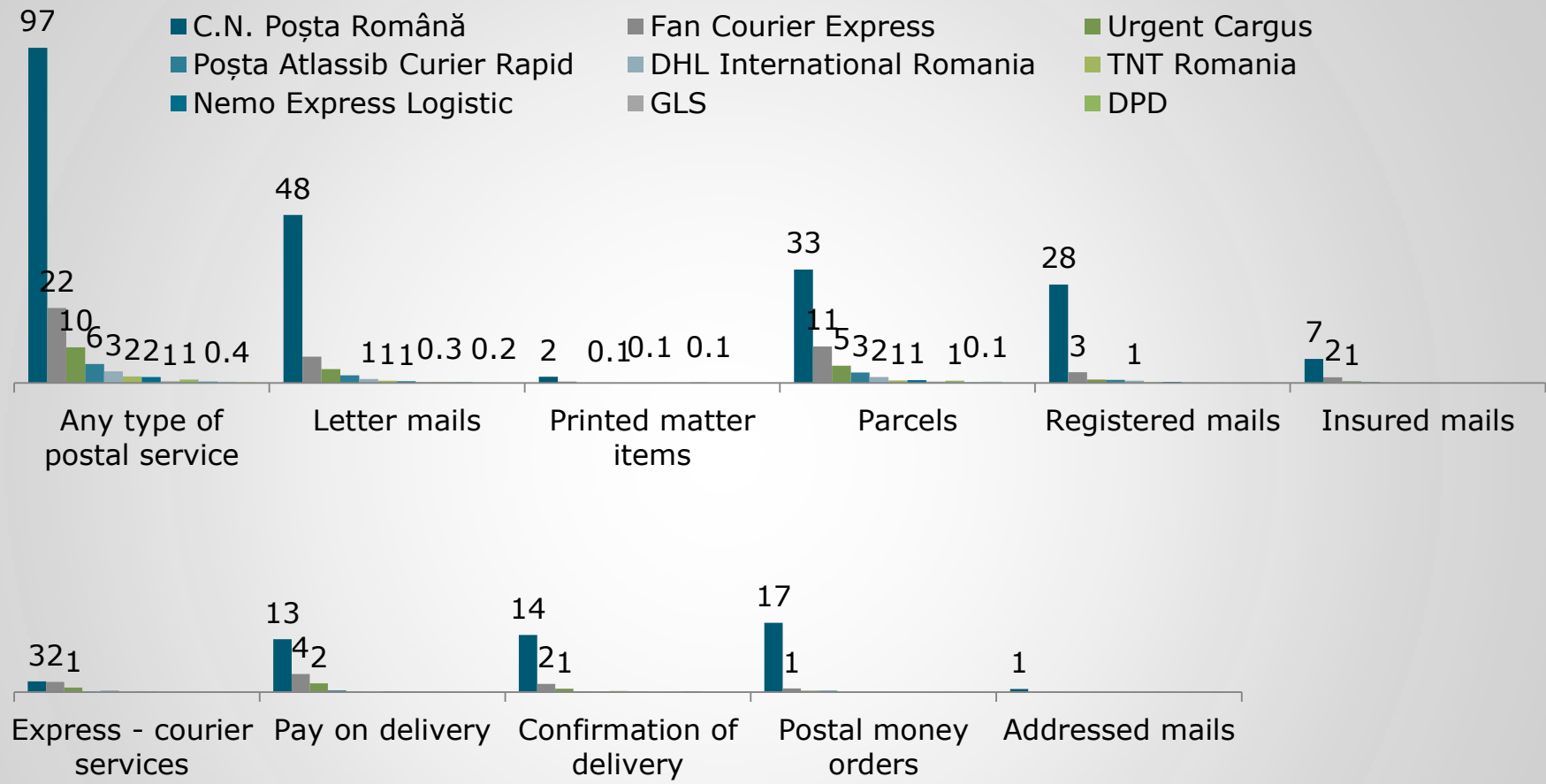


- F1. What postal services providers do you know, no matter if you personally used their services, or not?
- F2. Among the companies on this list, which do you know as a postal services provider?
- F3. Which of these providers offers postal services in your residential area?



Usage of Postal Services Providers at National Level

%



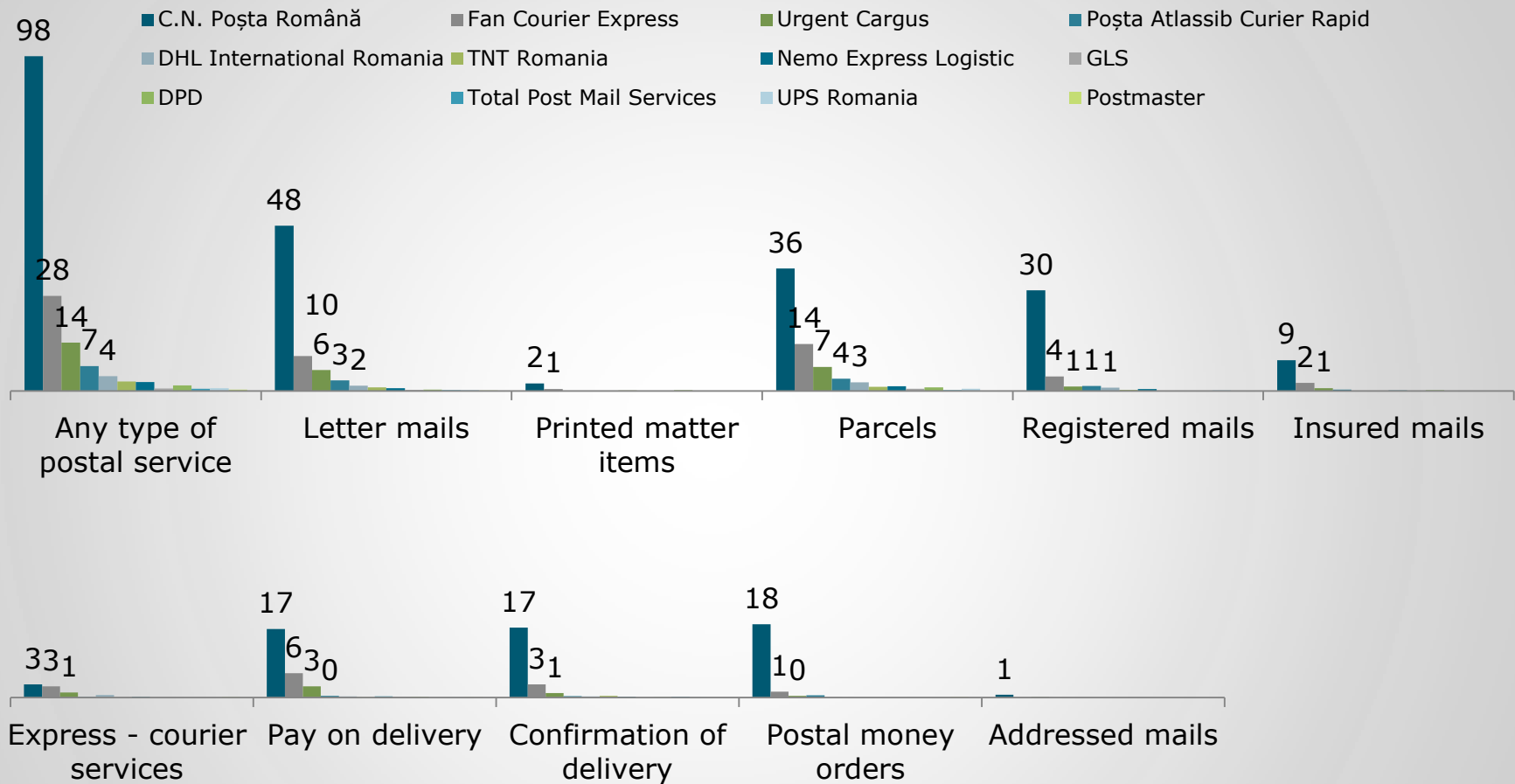
Base = all postal services users (n=1466)



F4. Please mention, for each type of postal service used over the last 12 months, what provider you used.

Usage of Postal Services Providers at Urban Level

%



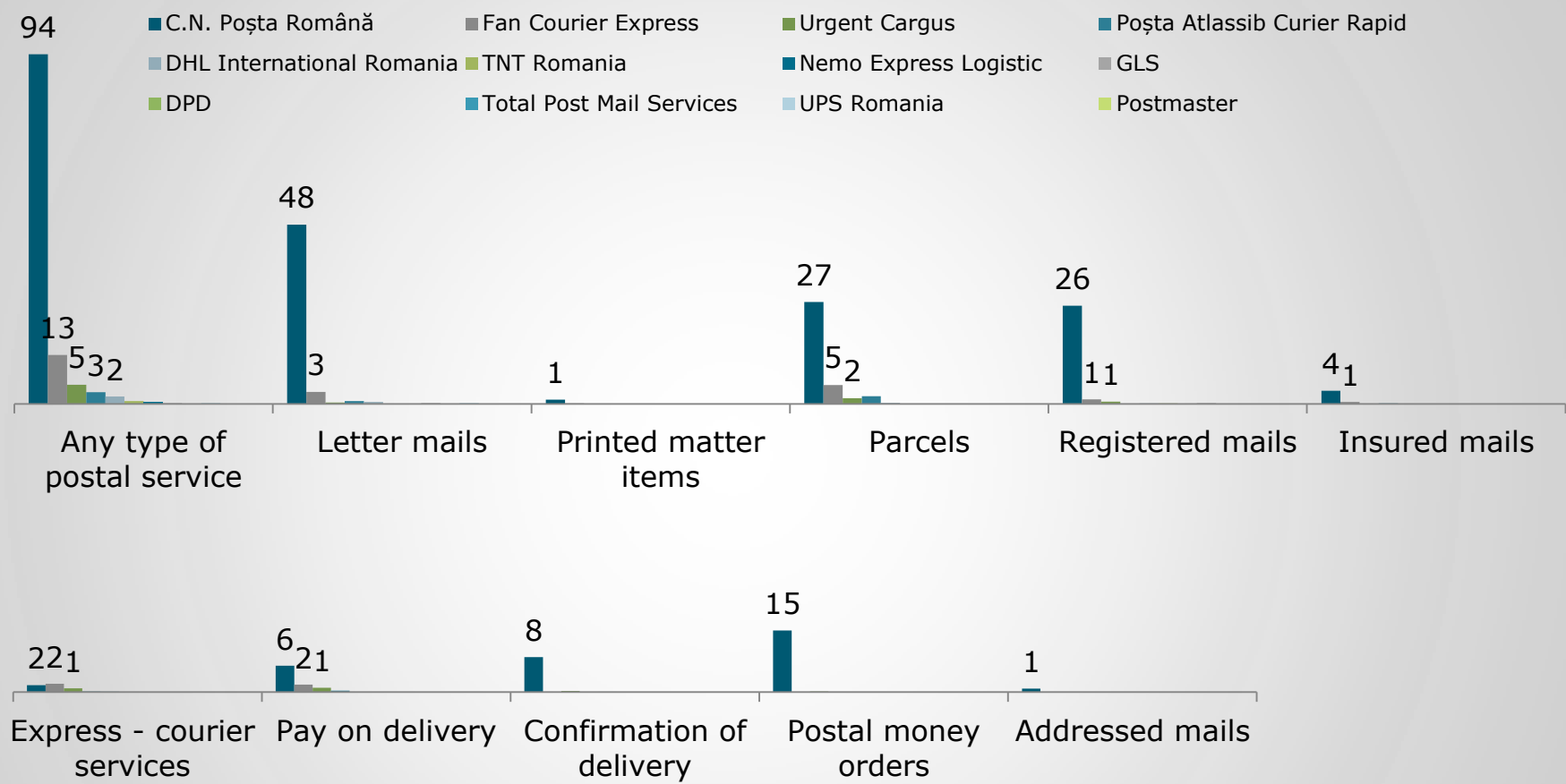
Base = postal services users in urban areas (n=849)



F4. Please mention, for each type of postal service used over the last 12 months, what provider you used.

Usage of Postal Services Providers at Rural Level

%

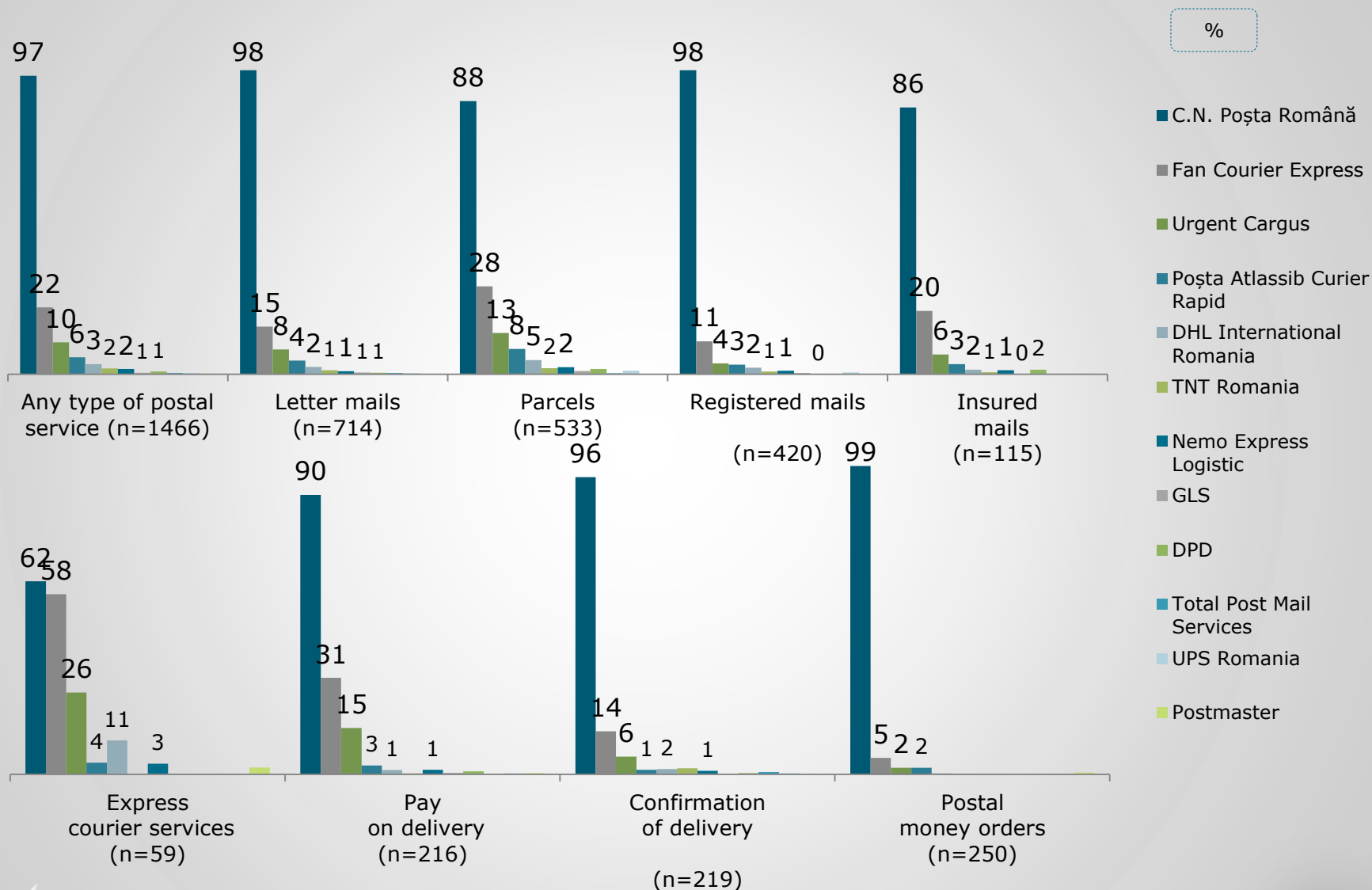


Base = postal services users in rural areas (n=617)



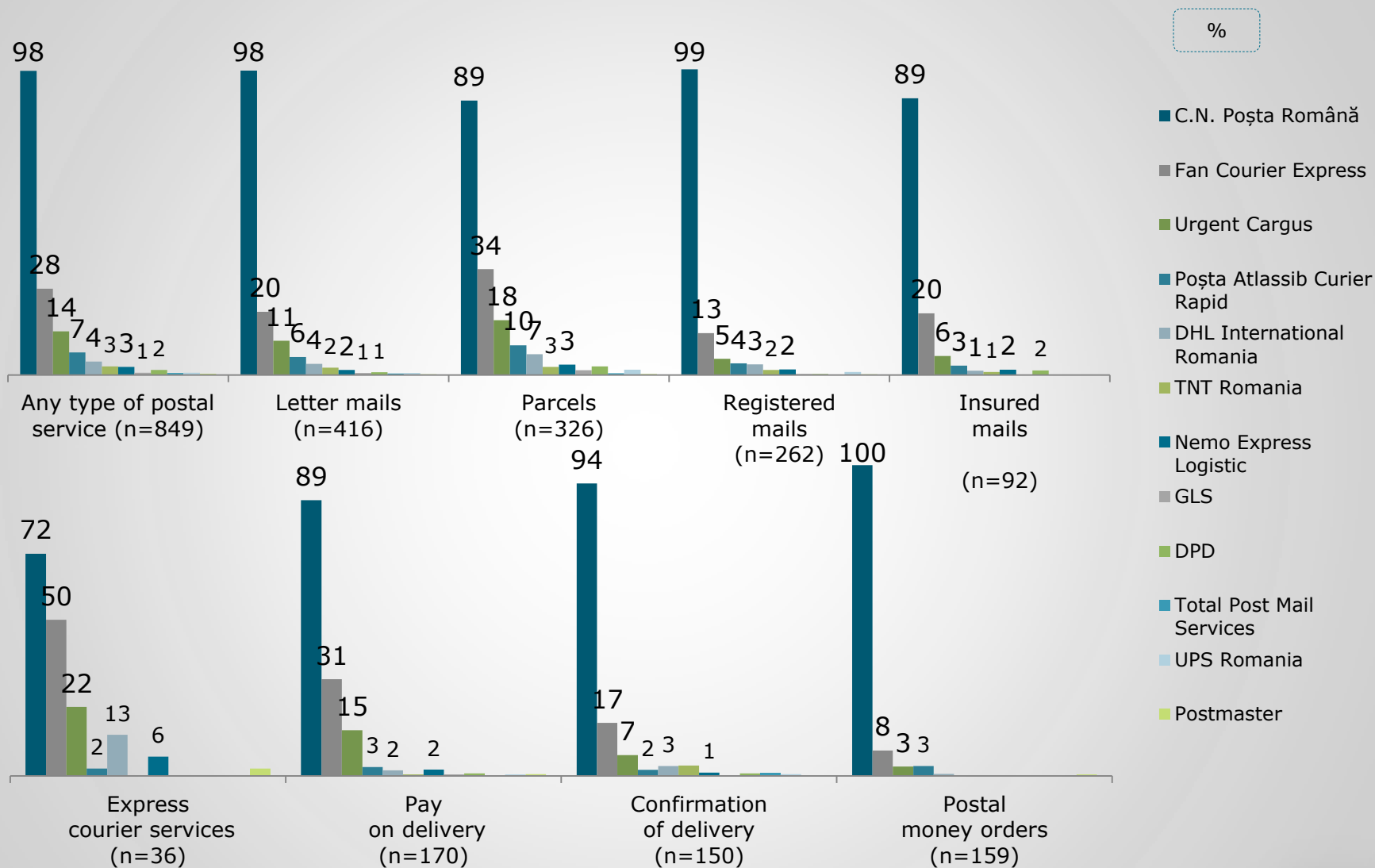
F4. Please mention, for each type of postal service used over the last 12 months, what provider you used.

Usage of Postal Services Providers amongst Users at National Level



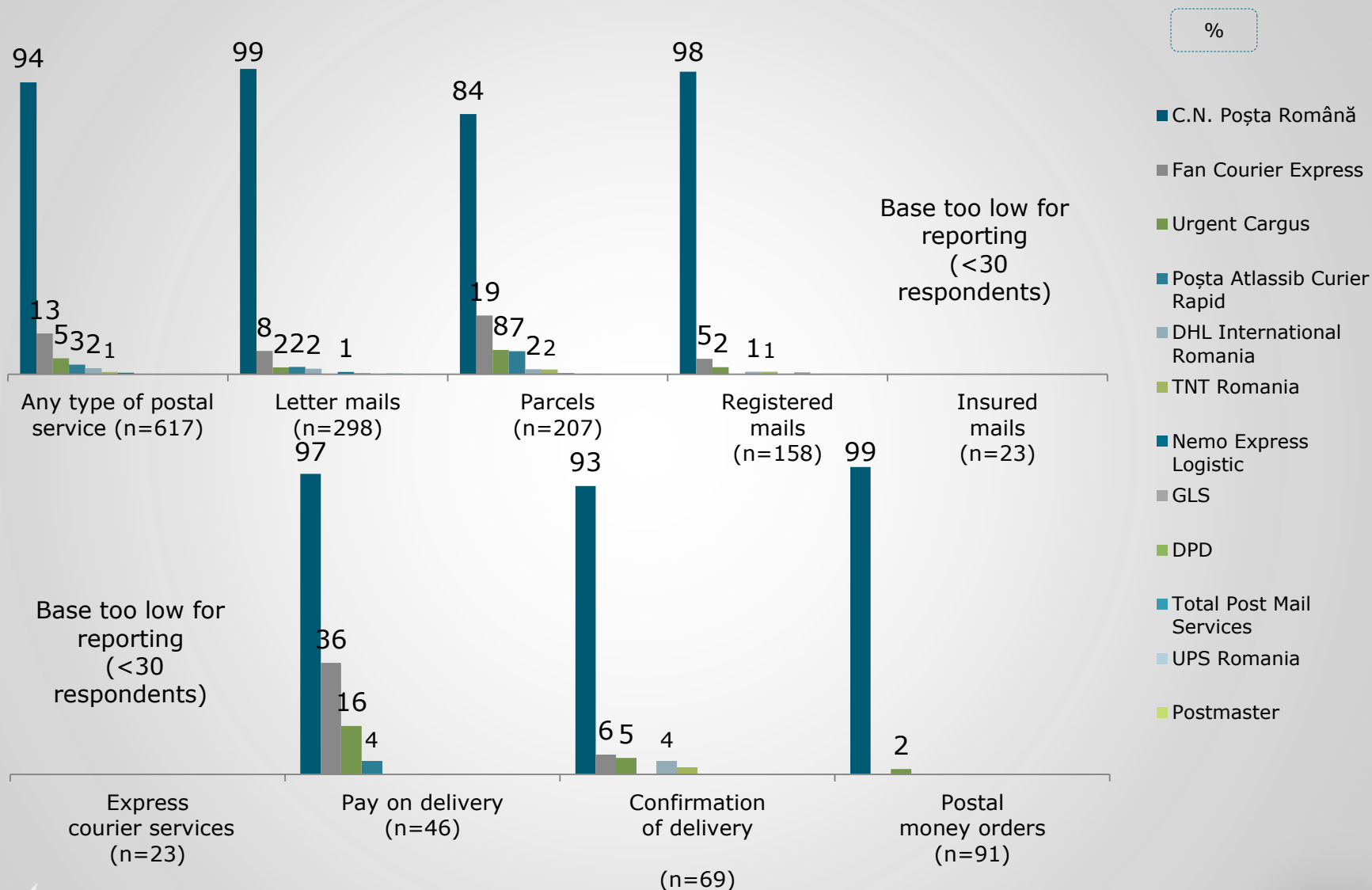
F4. Please mention, for each type of postal service used over the last 12 months, what provider you used.

Usage of Postal Services Providers amongst Users at Urban Level



F4. Please mention, for each type of postal service used over the 12 months, what provider you used.

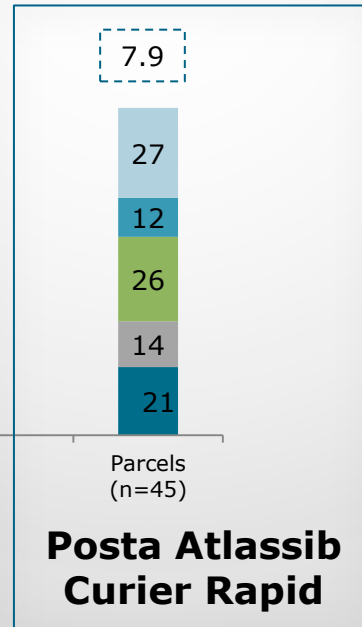
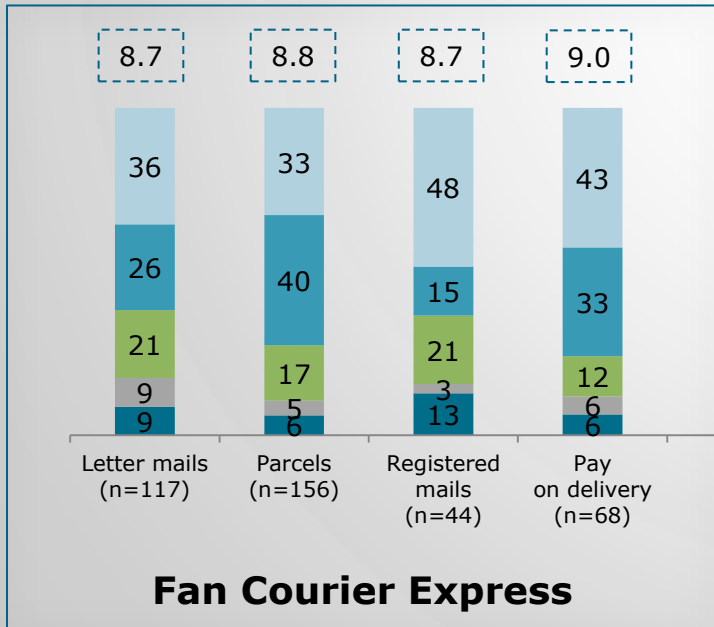
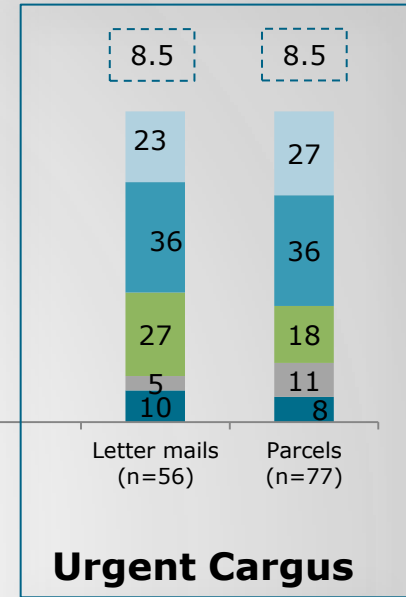
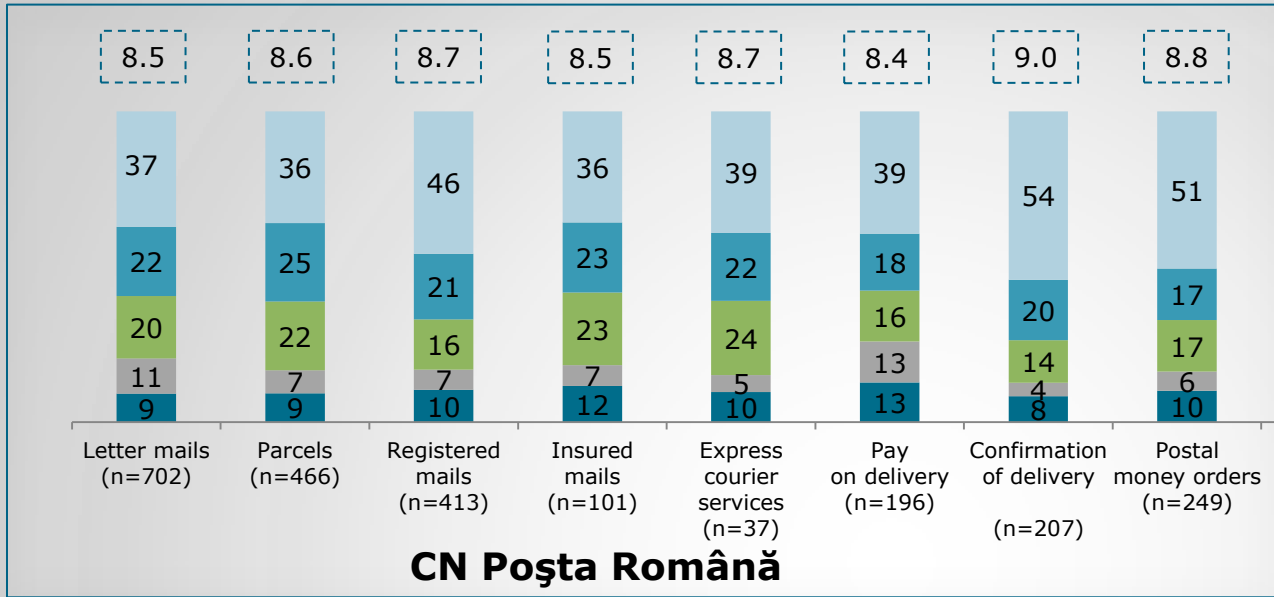
Usage of Postal Services Providers amongst Users at Rural Level



F4. Please mention, for each type of postal service used over the 12 months, what provider you used.

Users' Satisfaction with Postal Services Providers

%



Average satisfaction

- 10
- 9
- 8
- 7
- ≤6

Base = users of postal services from a specific provider

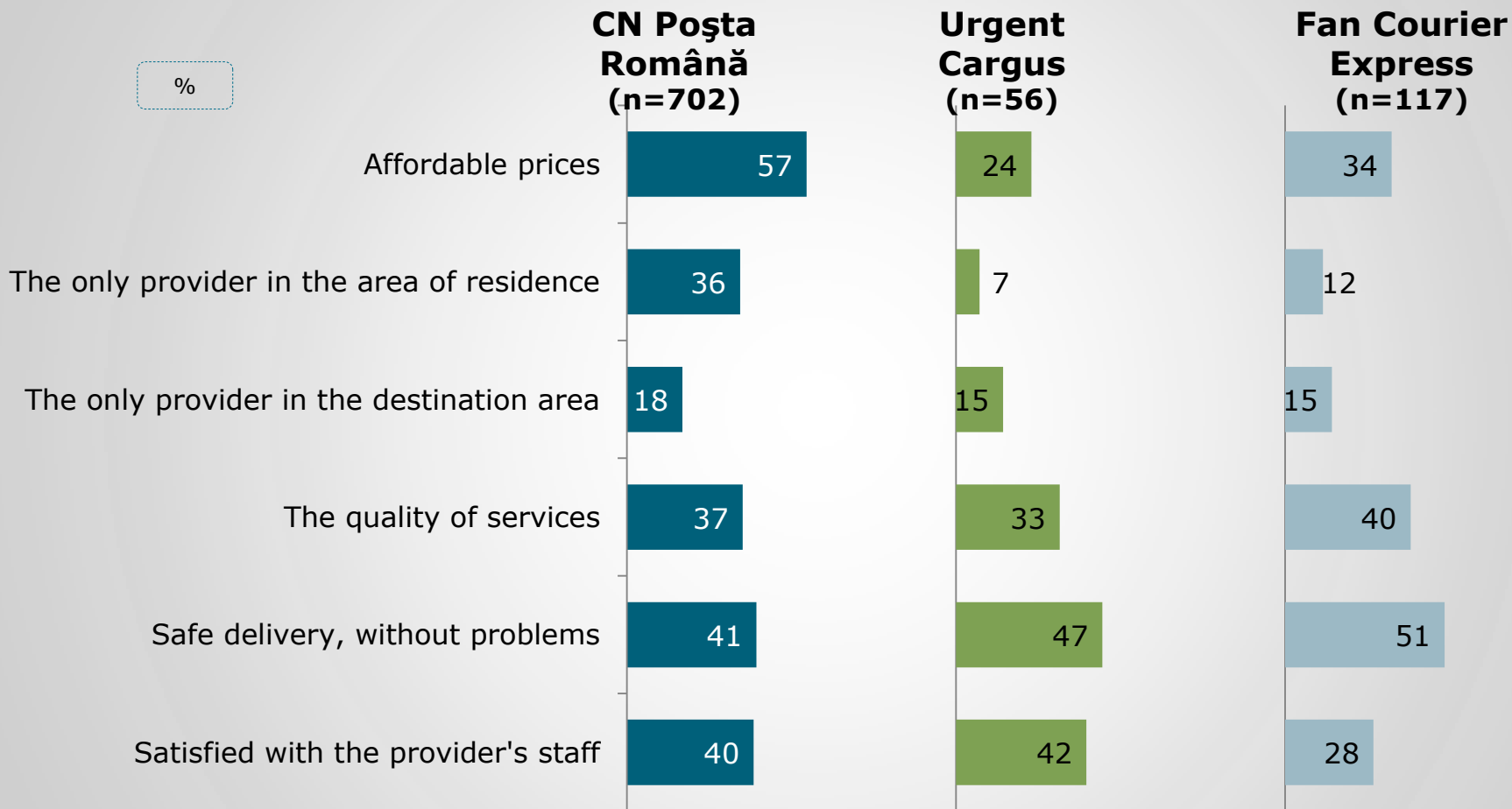


M1. How satisfied are you, in generally, with the [COMPANY], as a provider for [SERVICE]. Please rate from 1 to 10.

* Only for services and providers used by at least 30 respondents



Selection Criteria for Choosing Providers for National and International Letter Mails, at National Level

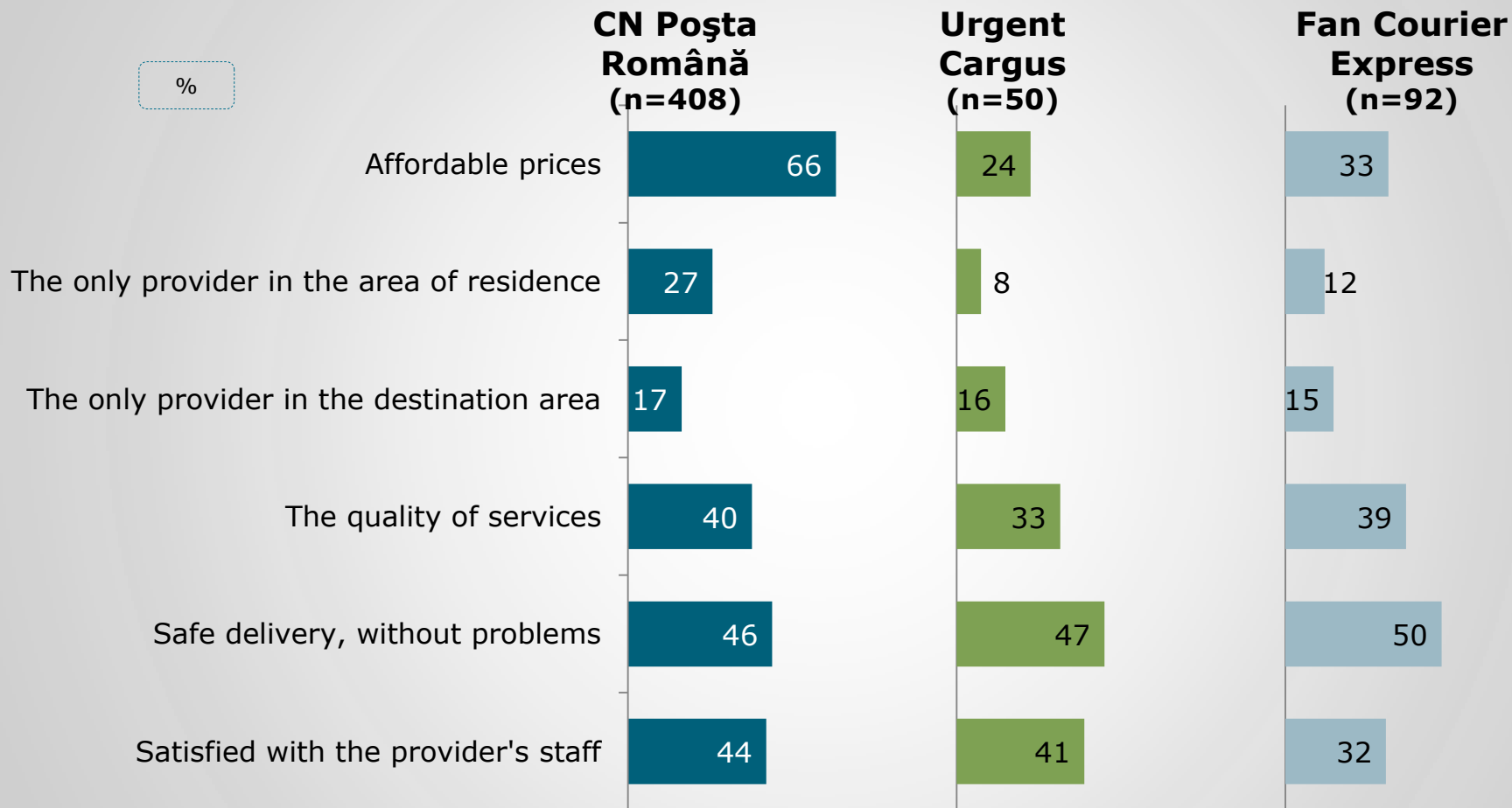


A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

Selection Criteria for Choosing Providers for National and International Letter Mails, at Urban Level



A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

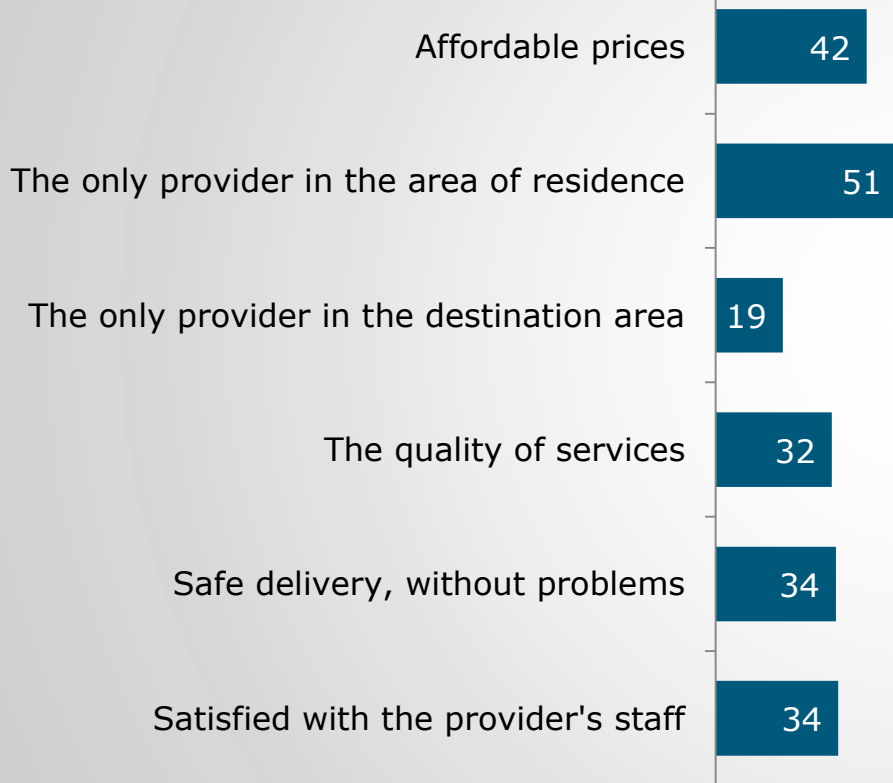
* Only for postal services and providers used by at least 30 respondents

Selection Criteria for Choosing Providers for National and International Letter Mails, at Rural Level

%

**CN Poșta
Română
(n=294)**

Base too low for reporting
Urgent Cargus and Fan Courier Express



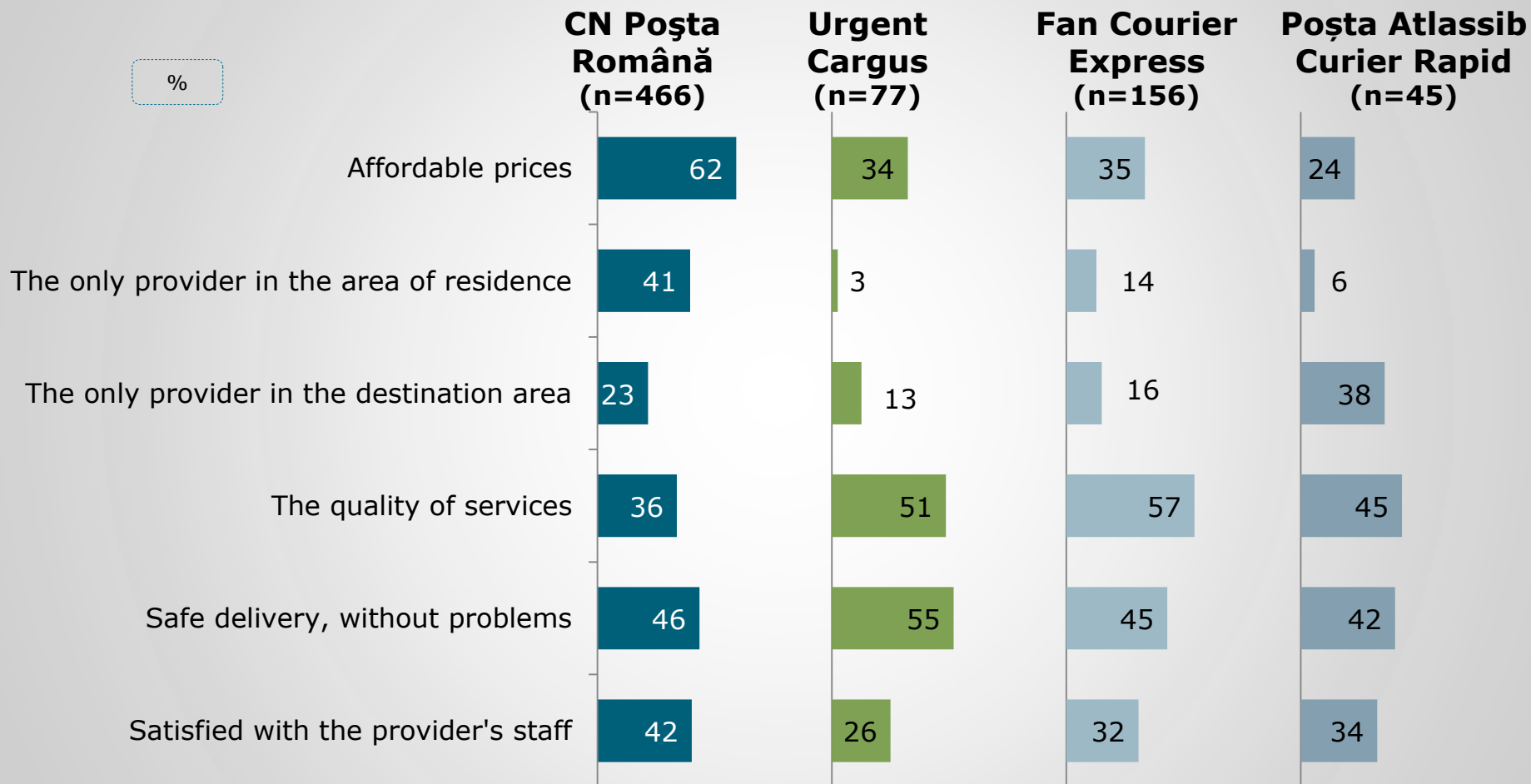
A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents



Selection Criteria for Choosing Providers for National and International Parcels, at National Level

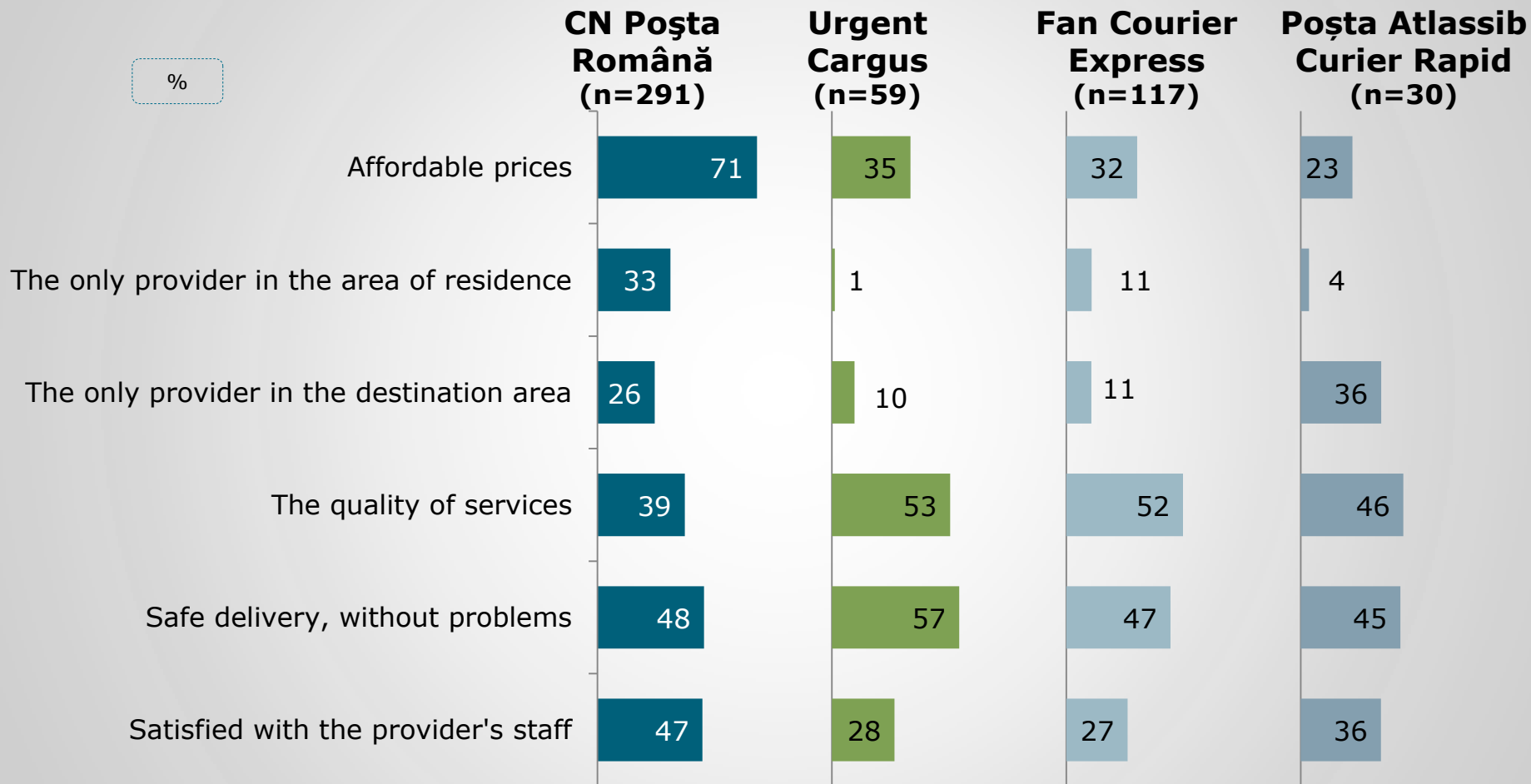


A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

Selection Criteria for Choosing Providers for National and International Parcels, at Urban Level



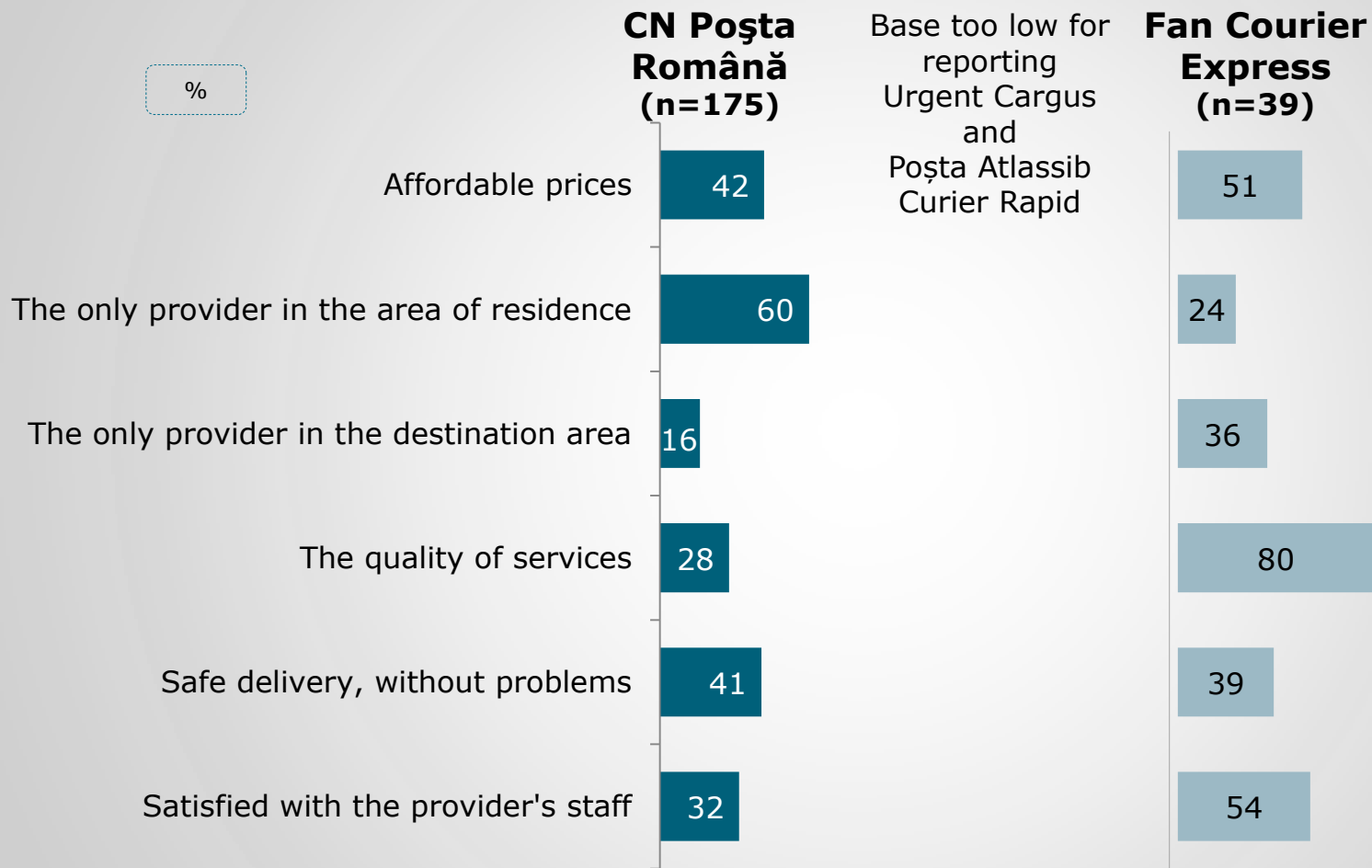
A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

Selection Criteria for Choosing Providers for National and International Parcels, at Rural Level

%



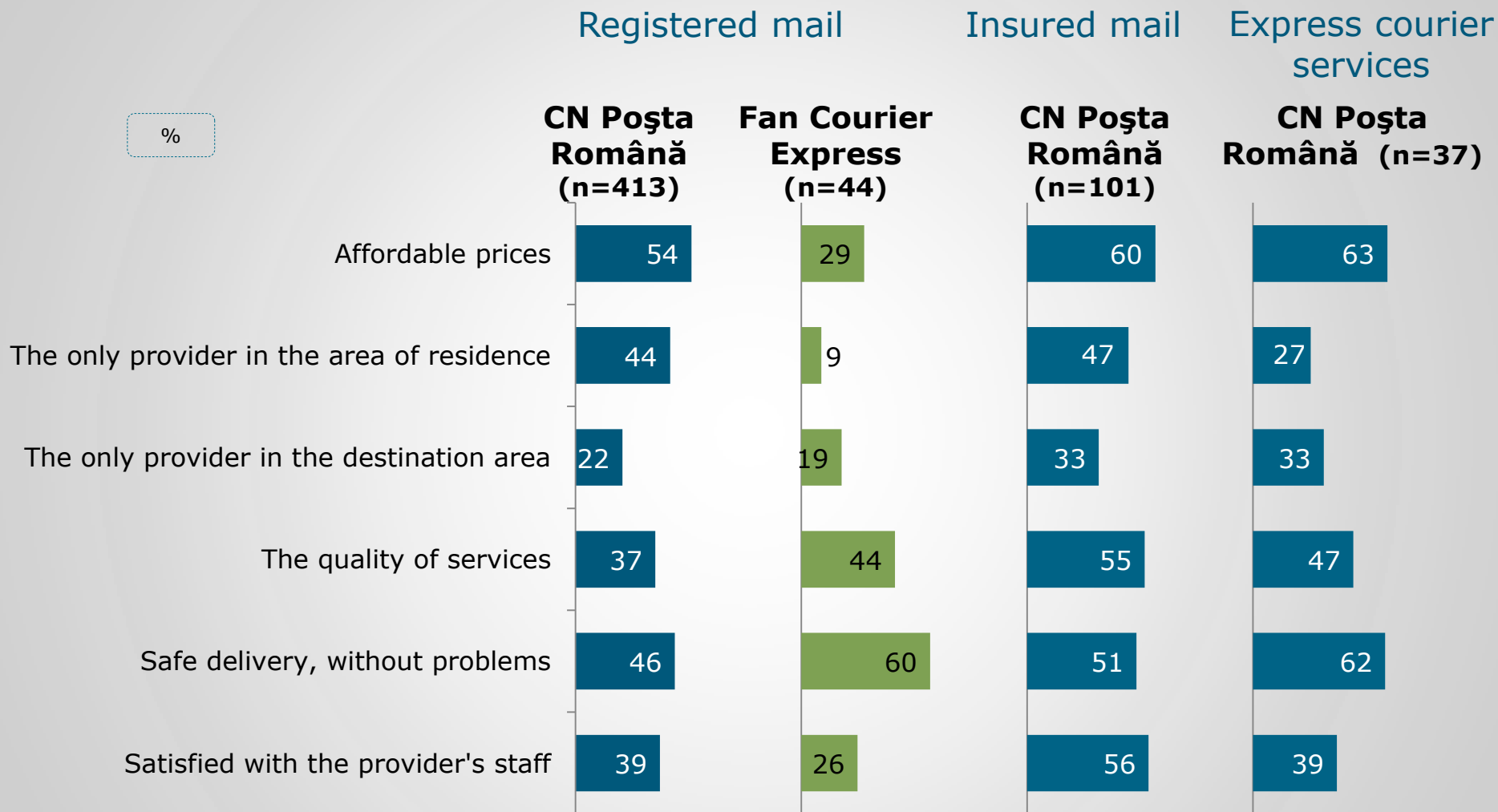
A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents



Selection Criteria for Choosing Providers for Registered and Insured Mails, and for Express Courier Services, at National Level



A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

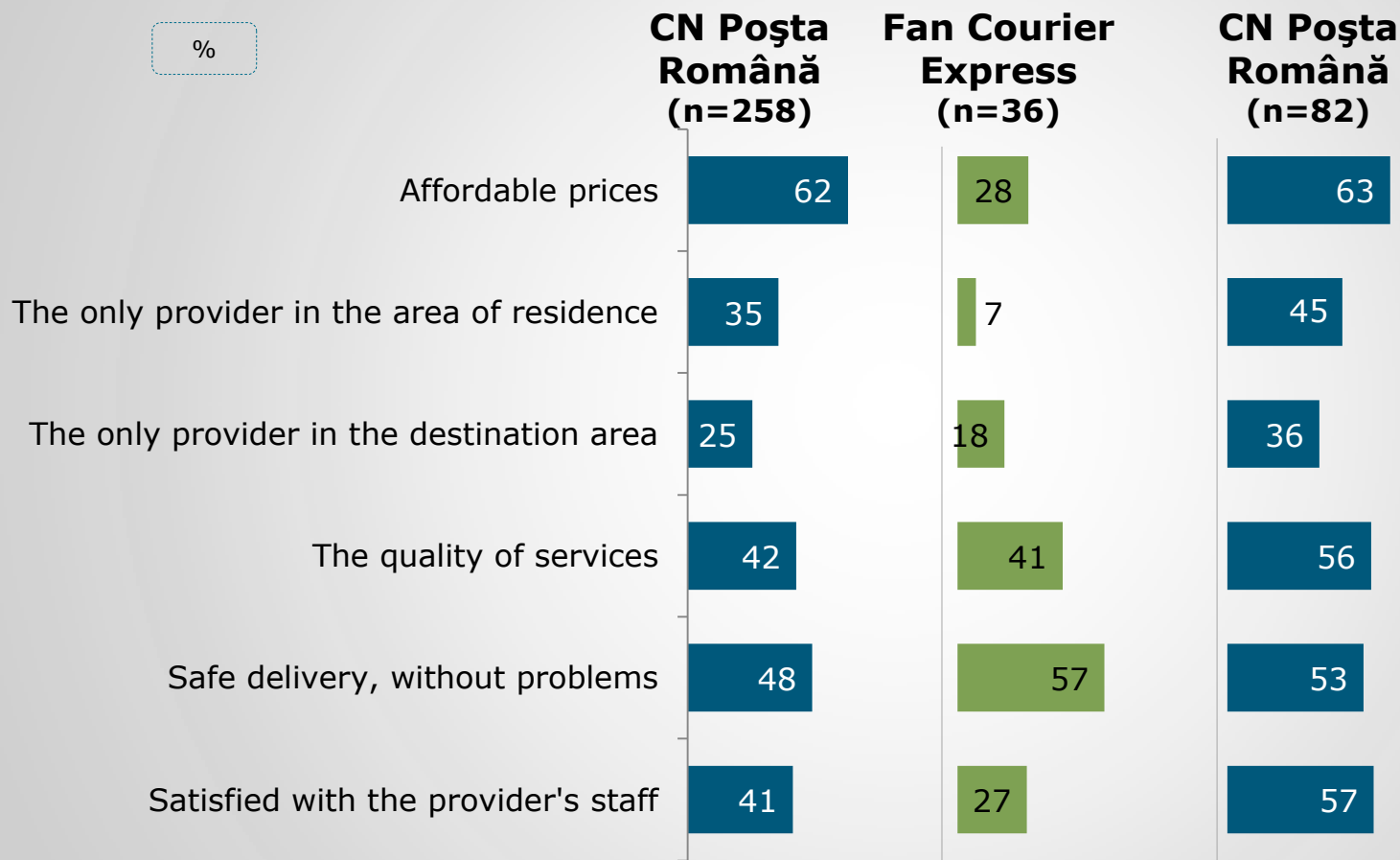
Selection Criteria for Choosing Providers for Registered and Insured Mails, and for Express Courier Services, at Urban Level

Registered mails

Insured mails

Base too low for reporting about Express-courier services offered by CN Poșta Română

%



A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

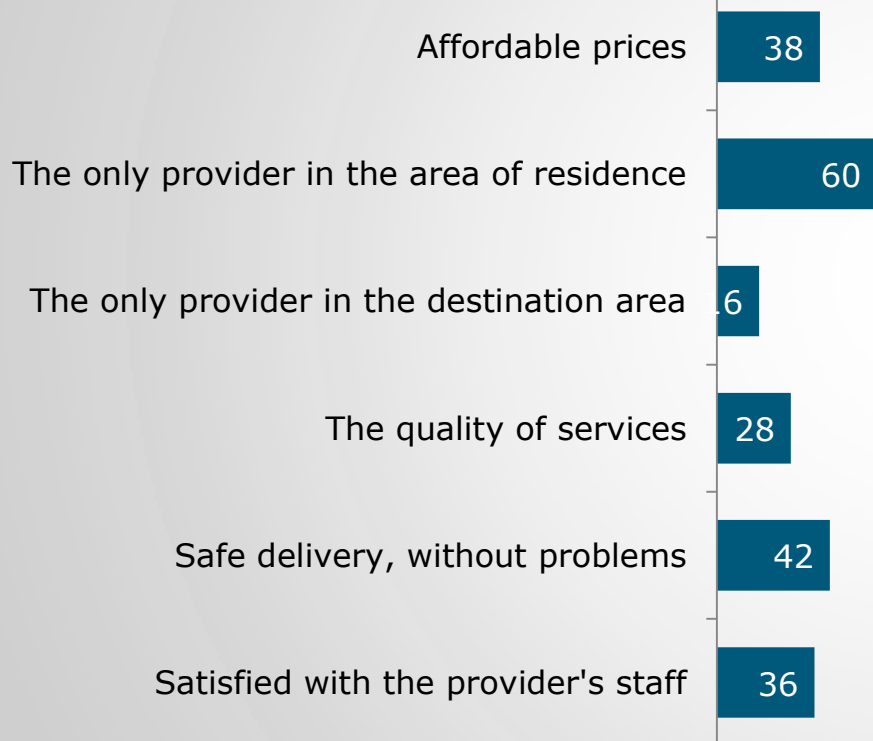
Selection Criteria for Choosing Providers for Registered and Insured Mails, and for Express Courier Services, at Rural Level

Registered mail

Base too low for reporting about registered mail of Fan Courier Express and about insured mail and Express-courier services offered by CN Poșta Română

%

CN Poșta Română
(n=155)



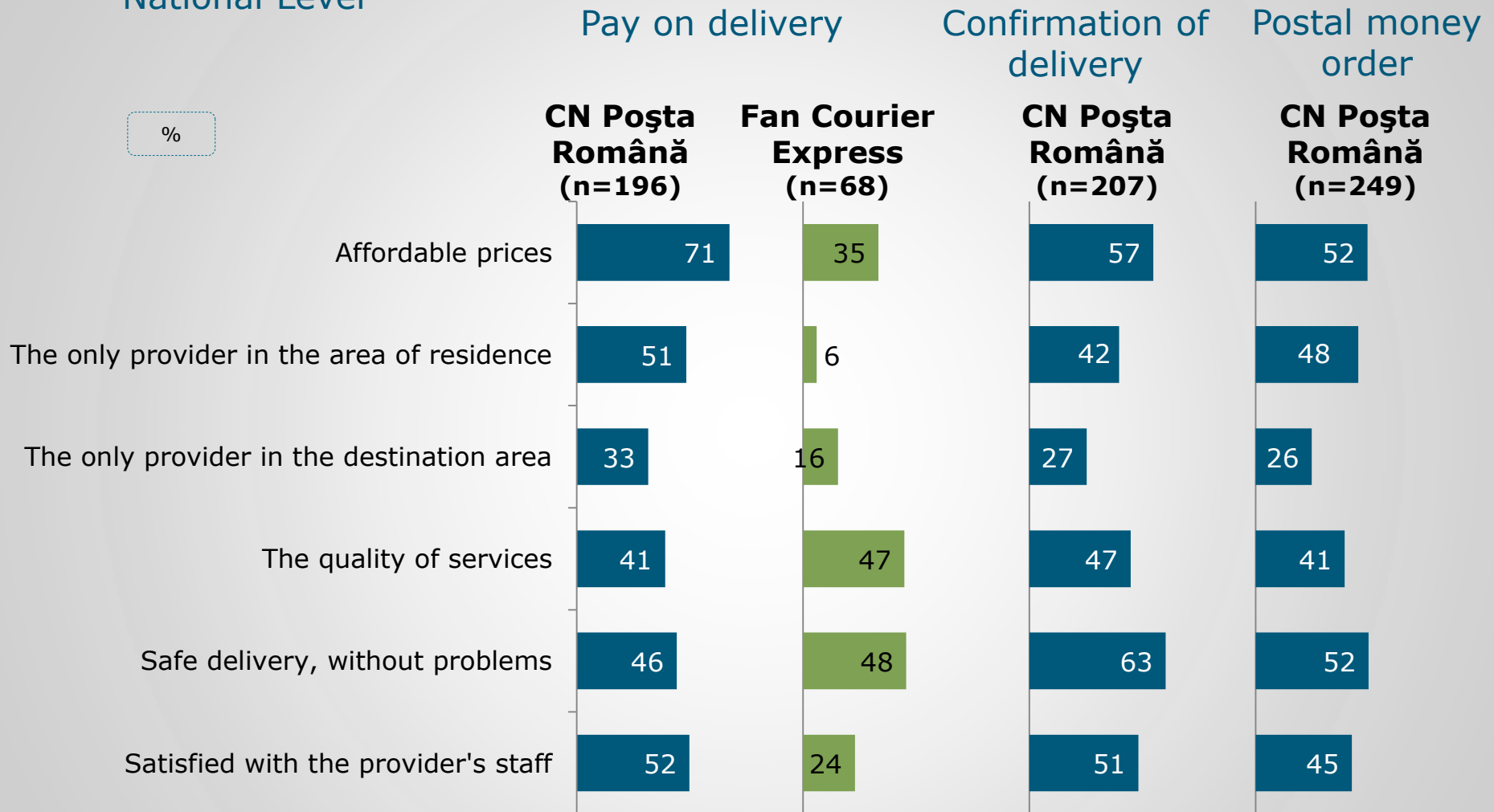
A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents



Selection Criteria for Choosing Providers for Pay on Delivery and Confirmation of Delivery Services, and for Postal Money Orders, at National Level

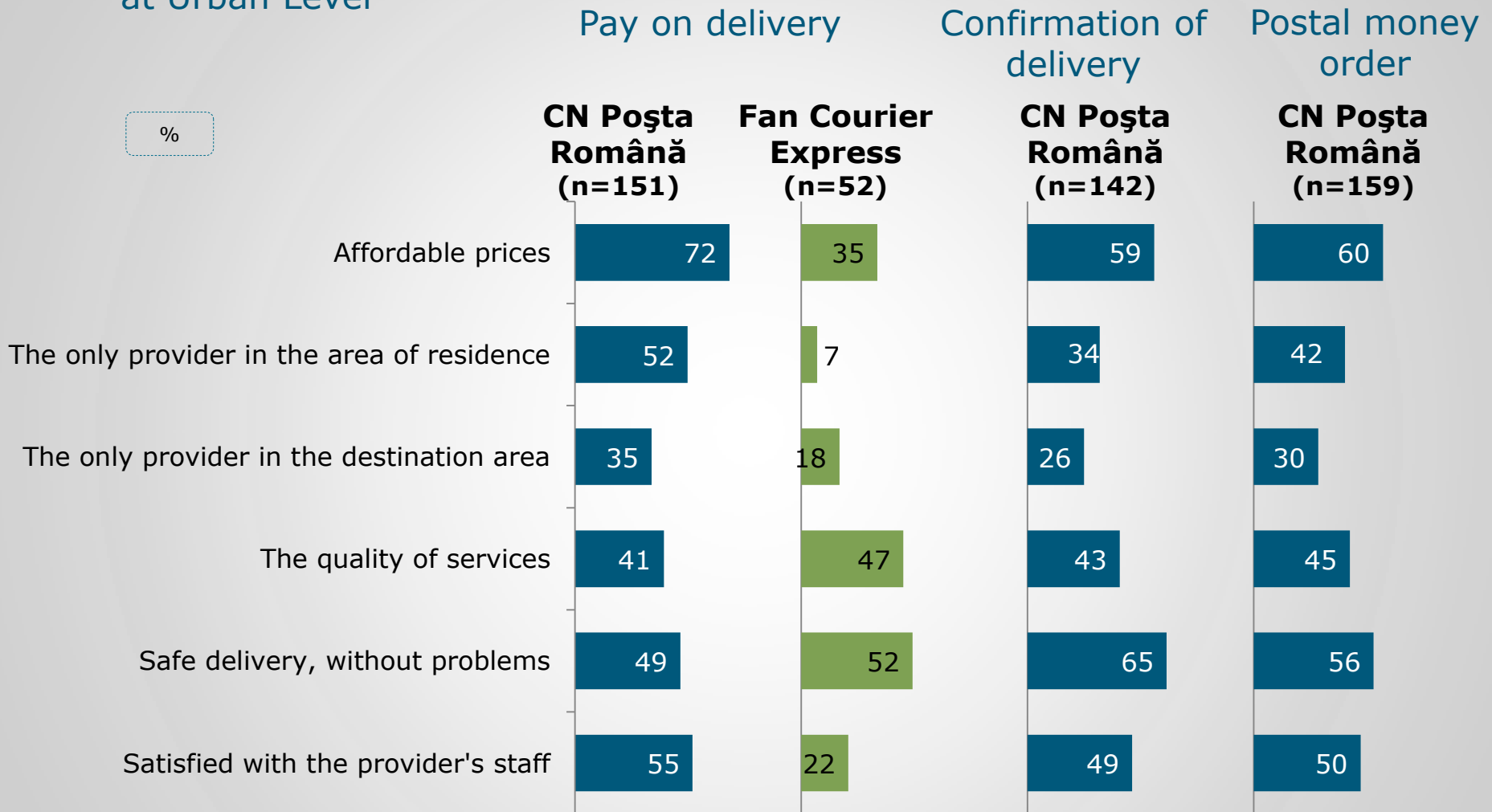


A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

Selection Criteria for Choosing Providers for Pay on Delivery and Confirmation of Delivery Services, and for Postal Money Orders, at Urban Level

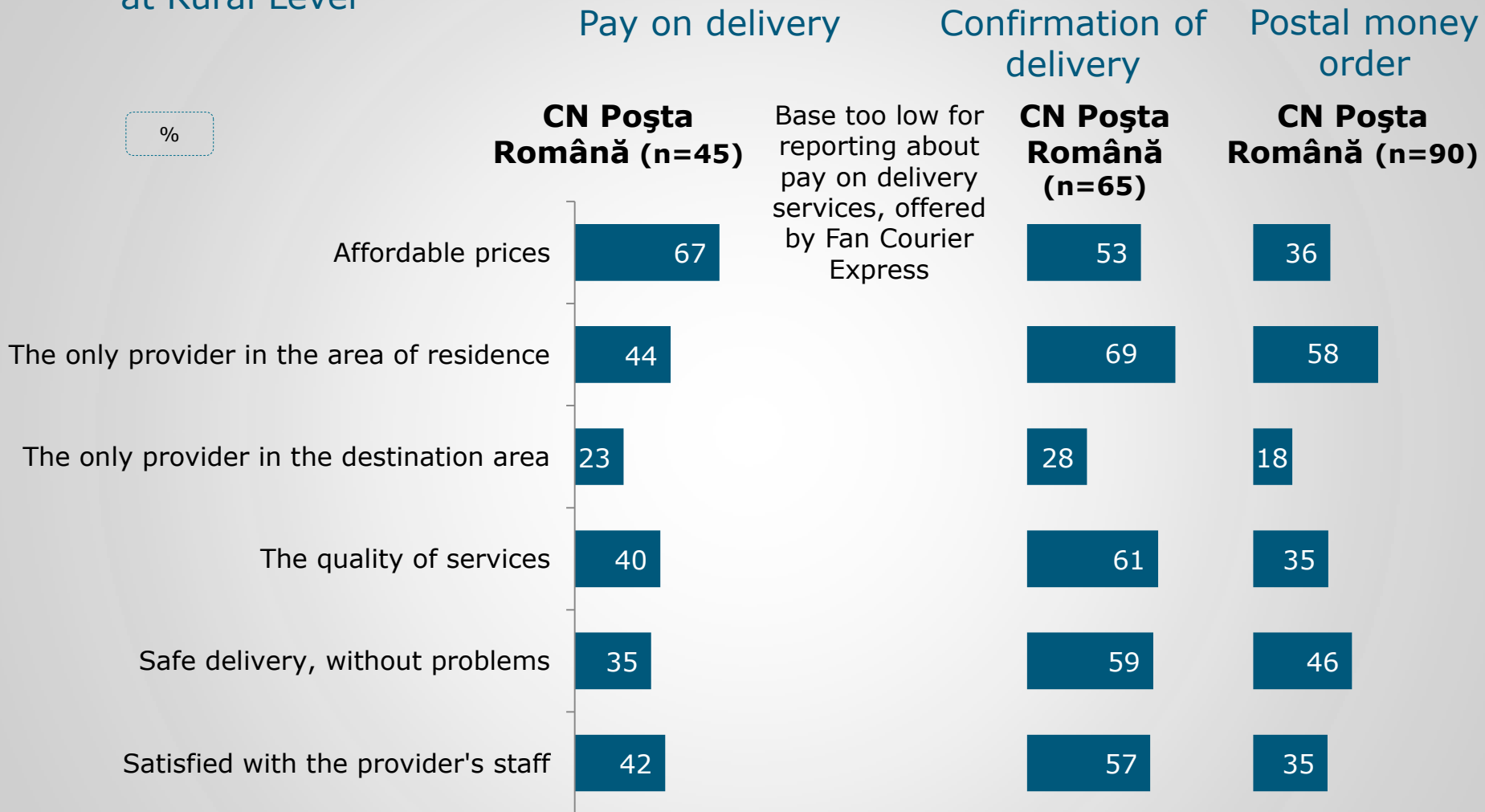


A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

Selection Criteria for Choosing Providers for Pay on Delivery and Confirmation of Delivery Services, and for Postal Money Orders, at Rural Level

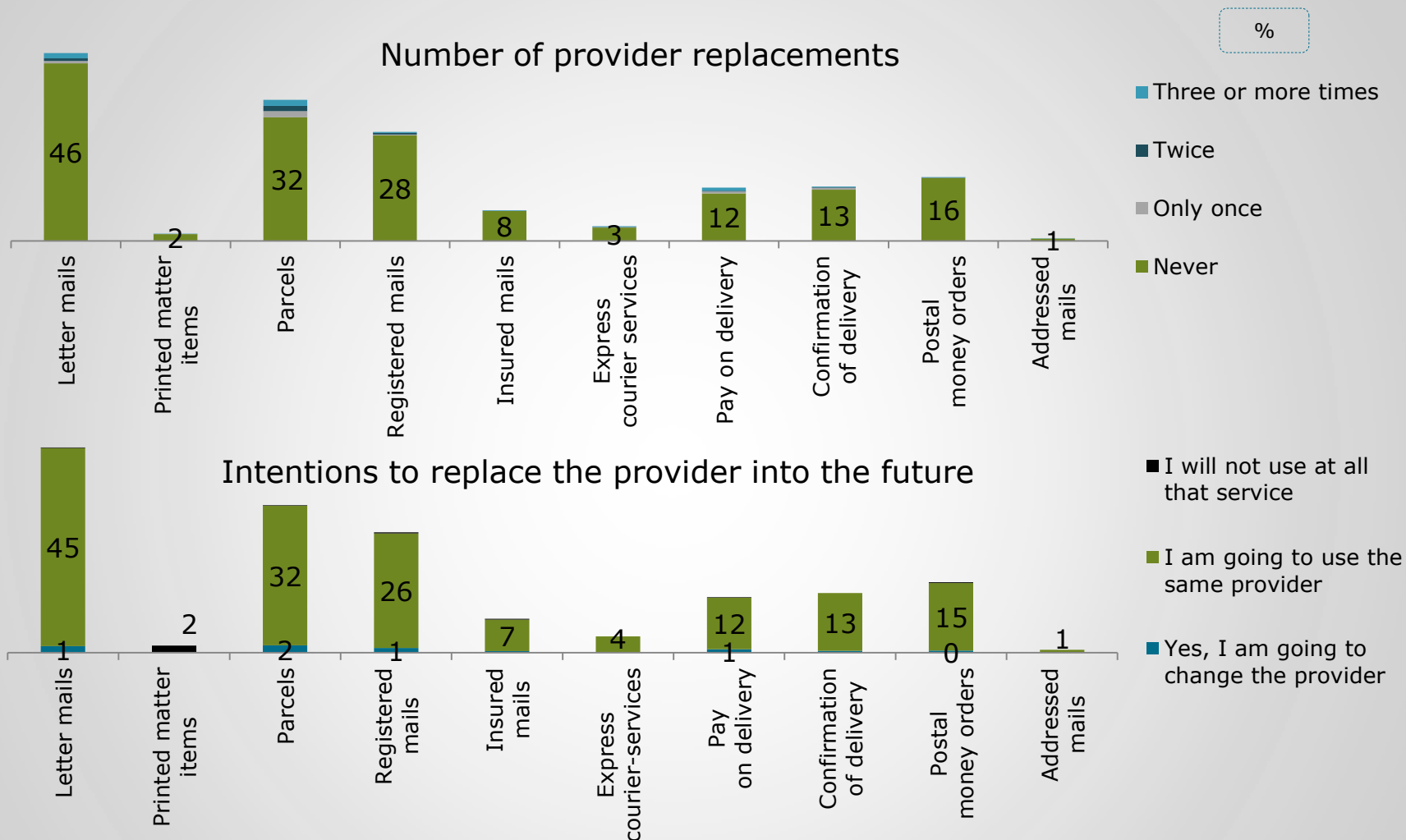


A1. When you choose to work with [PROVIDER/COMPANY] to get the [SERVICE], on what criteria did you make your decision?

Base = users of postal services from a specific provider

* Only for postal services and providers used by at least 30 respondents

Past Behavior and Intentions for the Future, at National Level

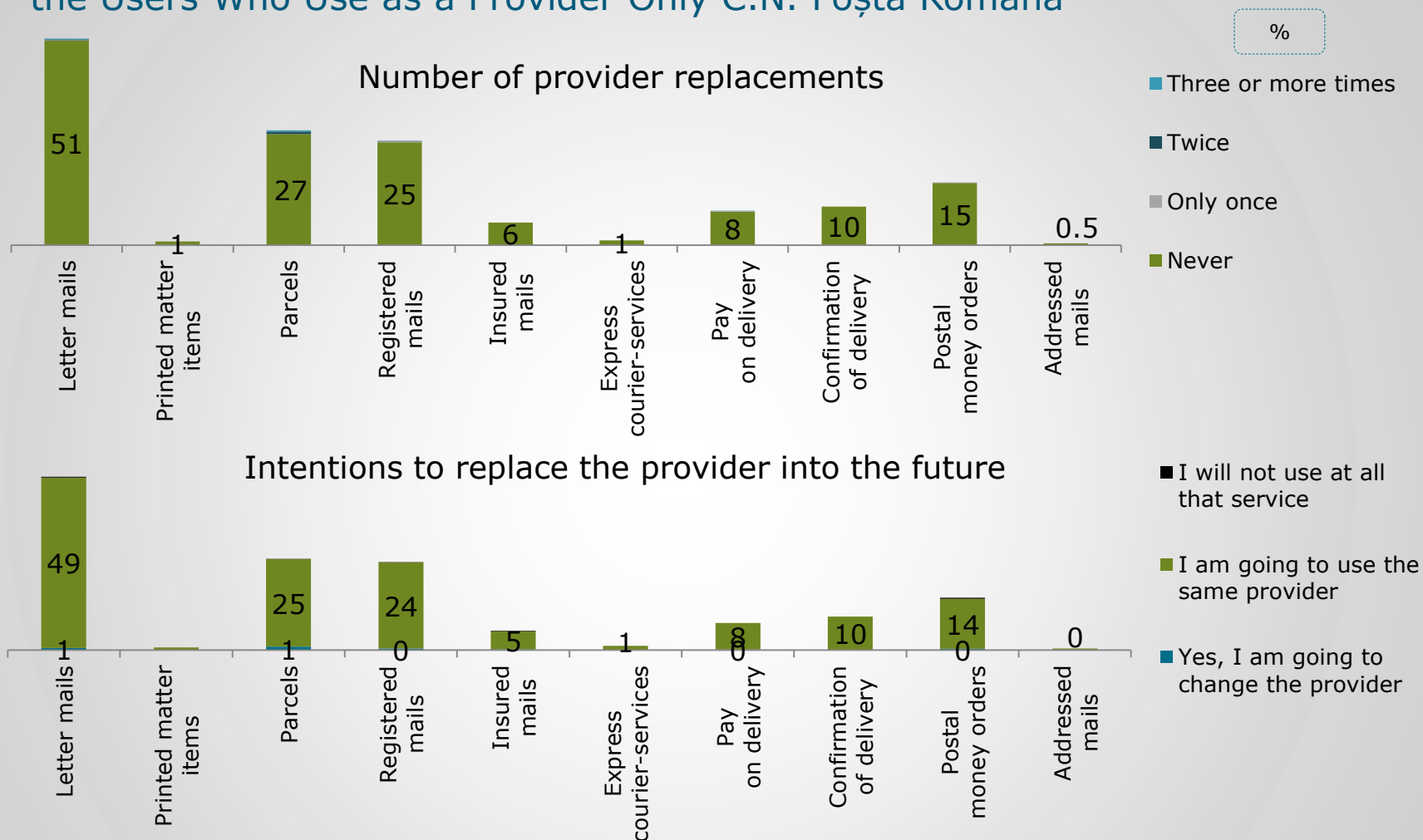


F5. Did you change your postal services provider for [SERVICE], over the last 12 months?
 F8. In the next 12 months, do you intend to change the postal service provider for [SERVICE]?

The difference is represented by non-users

Base = all postal services users
 (n=1466)

Past Behavior and Intentions for the Future, at National Level, amongst the Users Who Use as a Provider Only C.N. Poșta Română

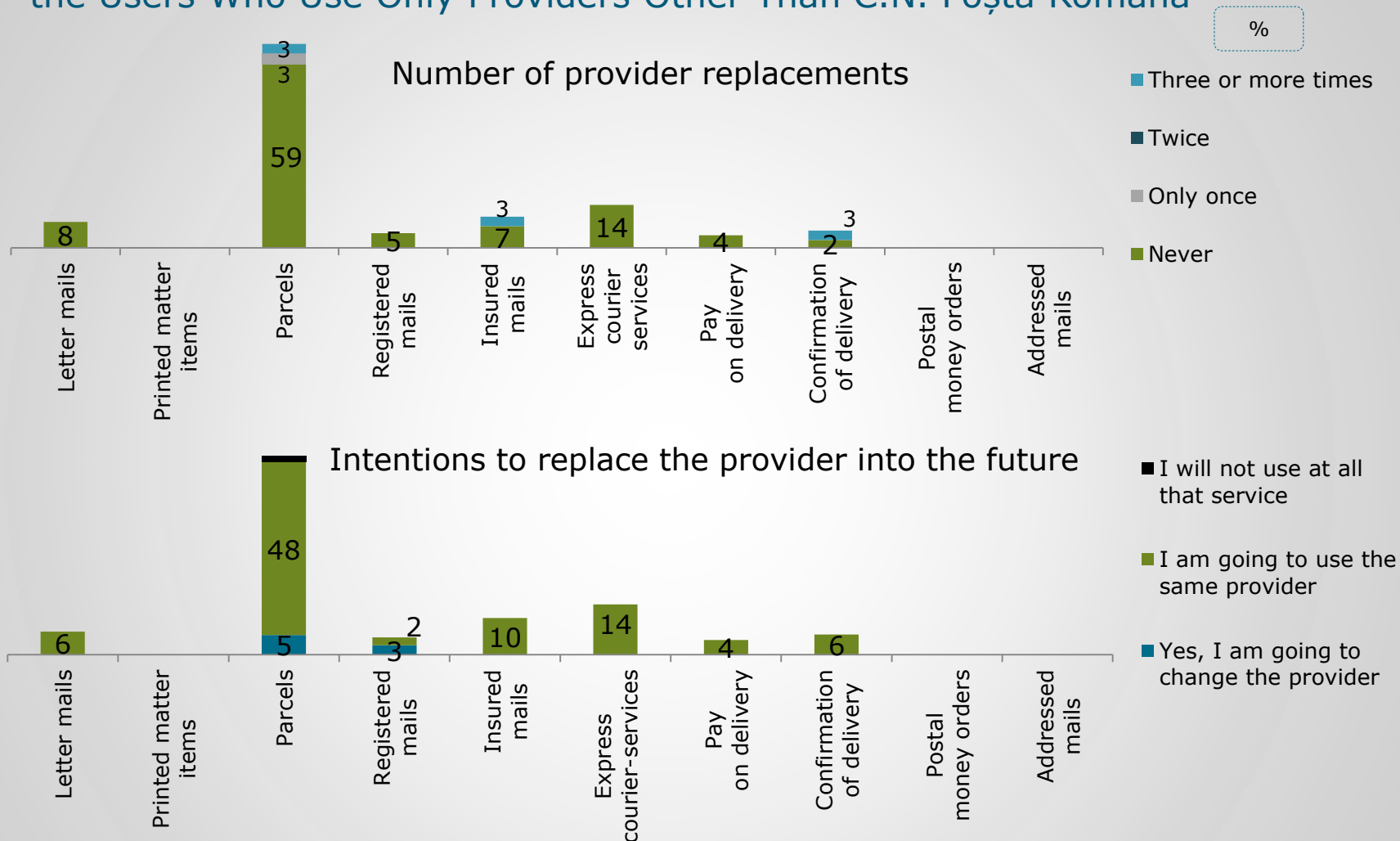


F5. Did you change your postal services provider for [SERVICE], over the last 12 months?
 F8. In the next 12 months, do you intend to change the postal service provider for [SERVICE]?

The difference is represented by non-users

Base = users who use exclusively CN Poșta Română as a provider (n=1018)

Past Behavior and Intentions for the Future, at National Level, amongst the Users Who Use Only Providers Other Than C.N. Poșta Română

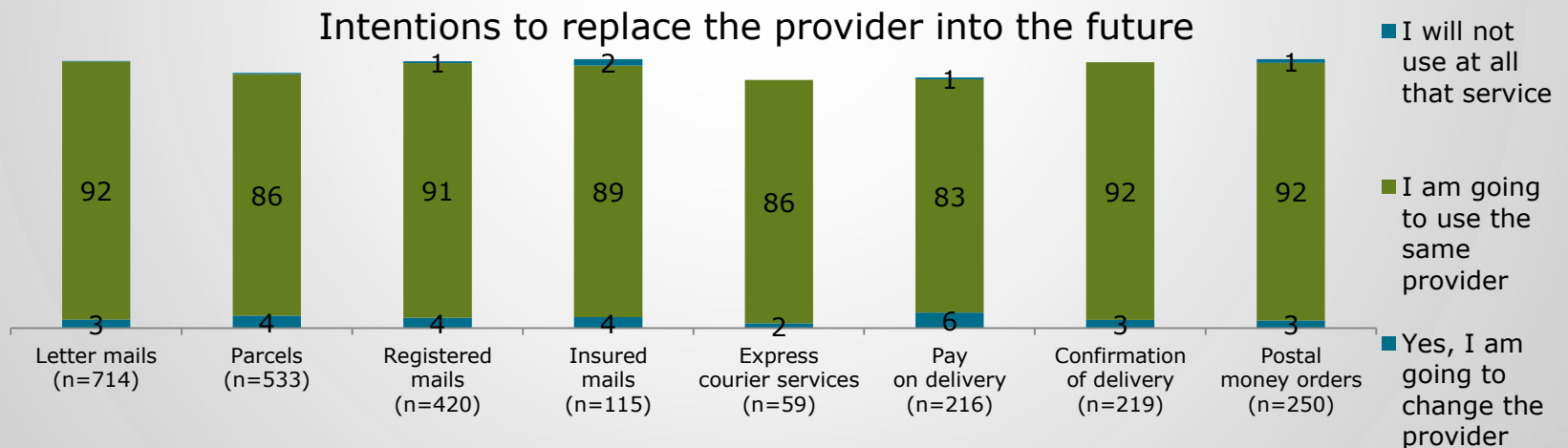
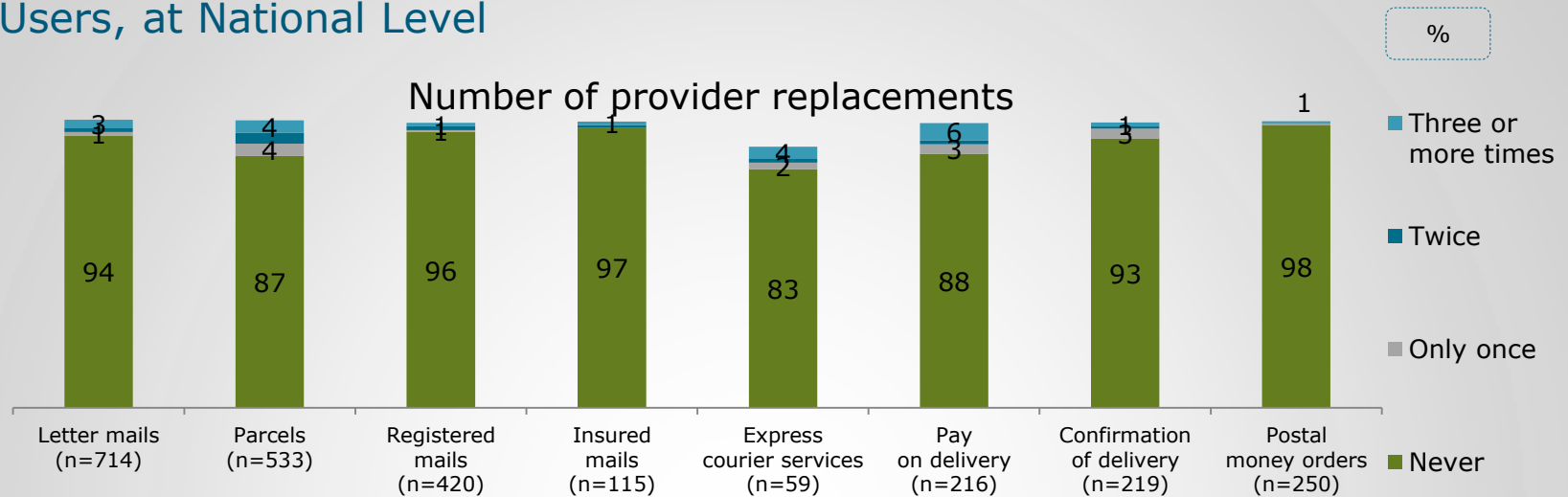


F5. Did you change your postal services provider for [SERVICE], over the last 12 months?
 F8. In the next 12 months, do you intend to change the postal service provider for [SERVICE]?

The difference is represented by non-users

Base = users who use exclusively other providers than CN Poșta Română (n=45)

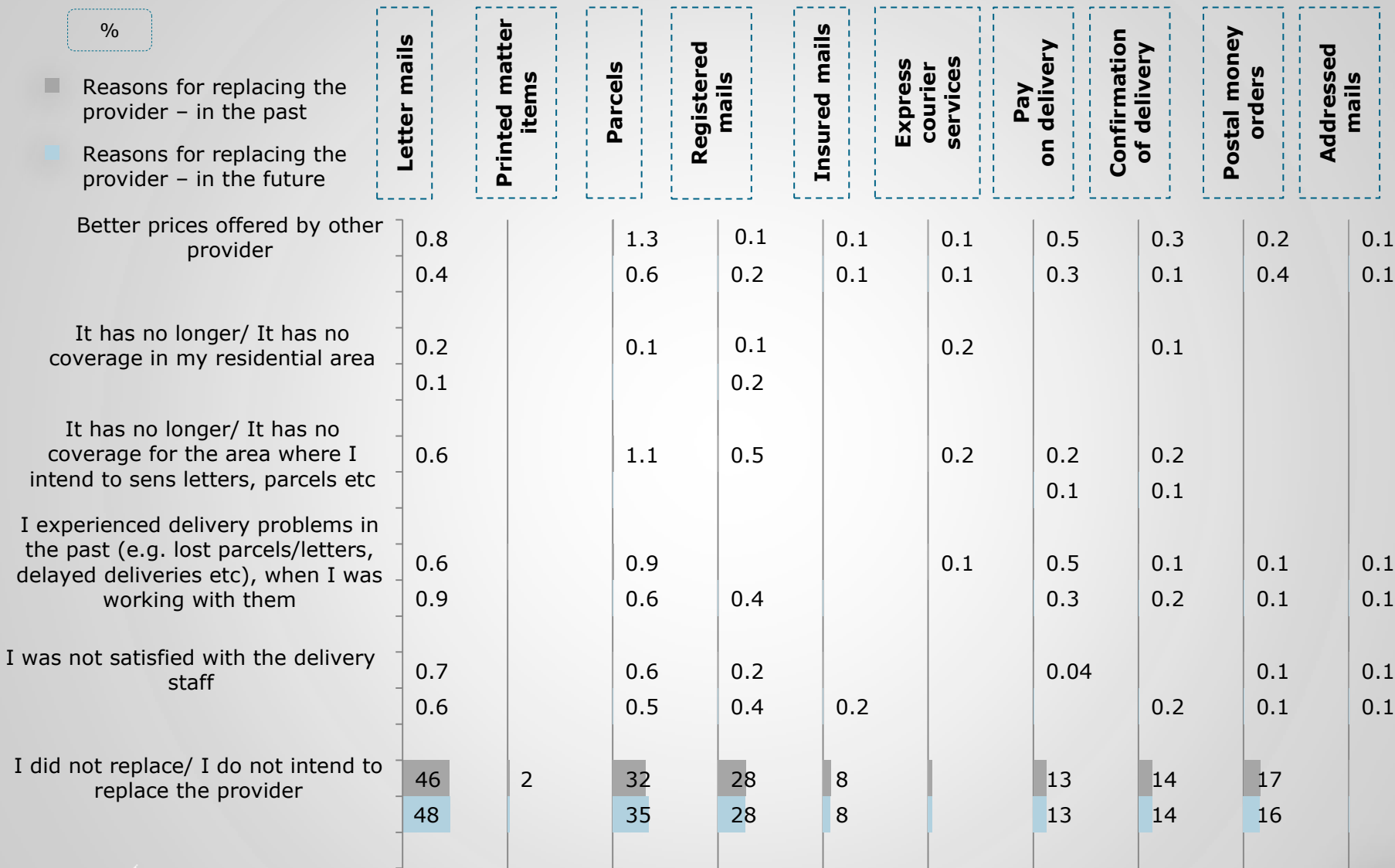
Past Behavior and Intentions for the Future amongst the Postal Services Users, at National Level



F5. Did you change your postal services provider for [SERVICE], over the last 12 months?
 F8. In the next 12 months, do you intend to change the postal service provider for [SERVICE]?

The difference is represented by answers "Does not know/Does not answer"

Reasons for Replacing the Provider – Past and Future, at National Level

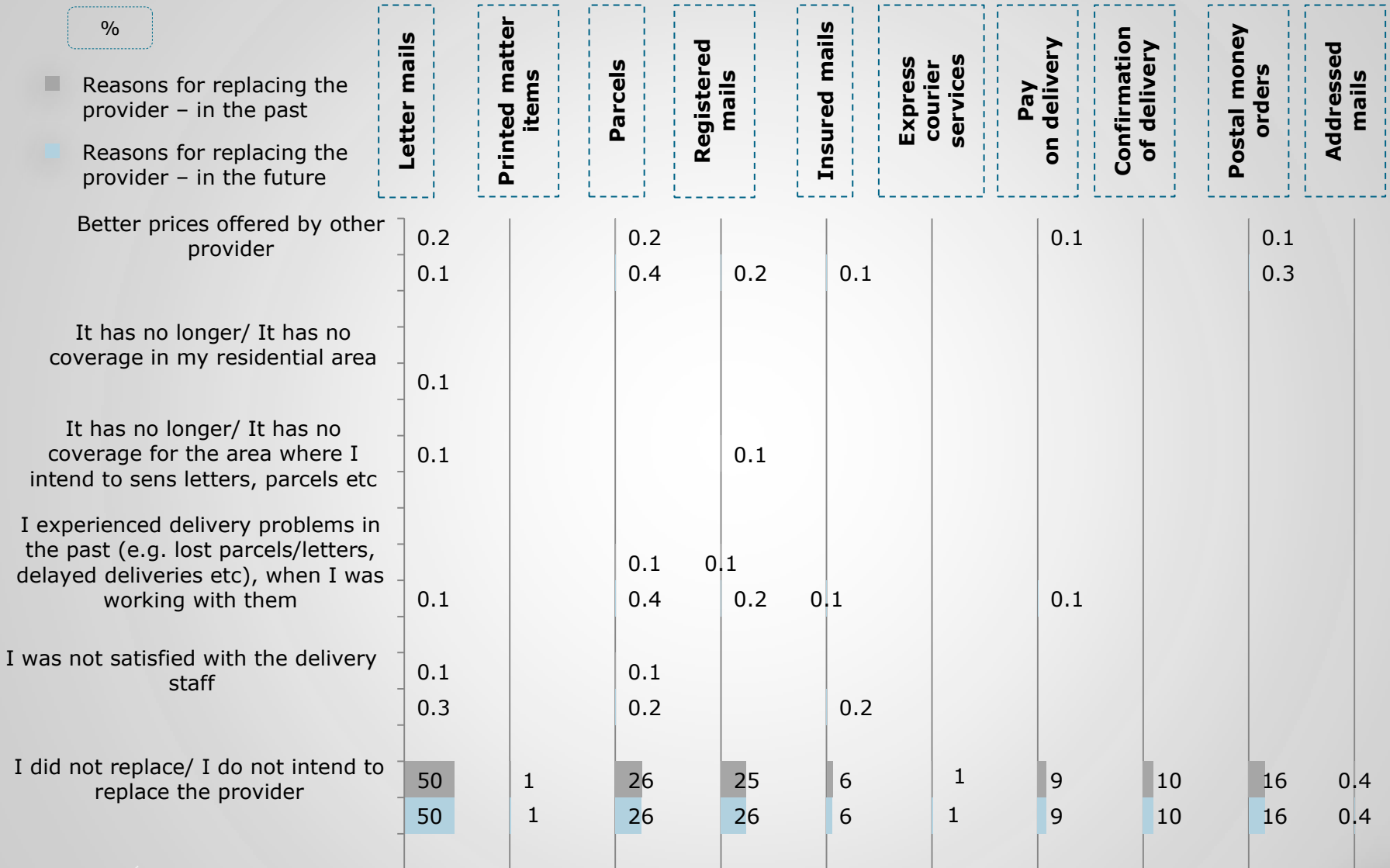


F6. For what reasons did you replace the provider for [SERVICE]?
 F9. What reasons determine you to change the provider for [SERVICE]?

Base = all postal services users (n=1466)

The difference is represented by non-users

Reasons for Replacing the Provider – Past and Future, at National Level, amongst Users Who Use Exclusively CN Poșta Română



F6. For what reasons did you replace the provider for [SERVICE]?
 F9. What reasons determine you to change the provider for [SERVICE]?

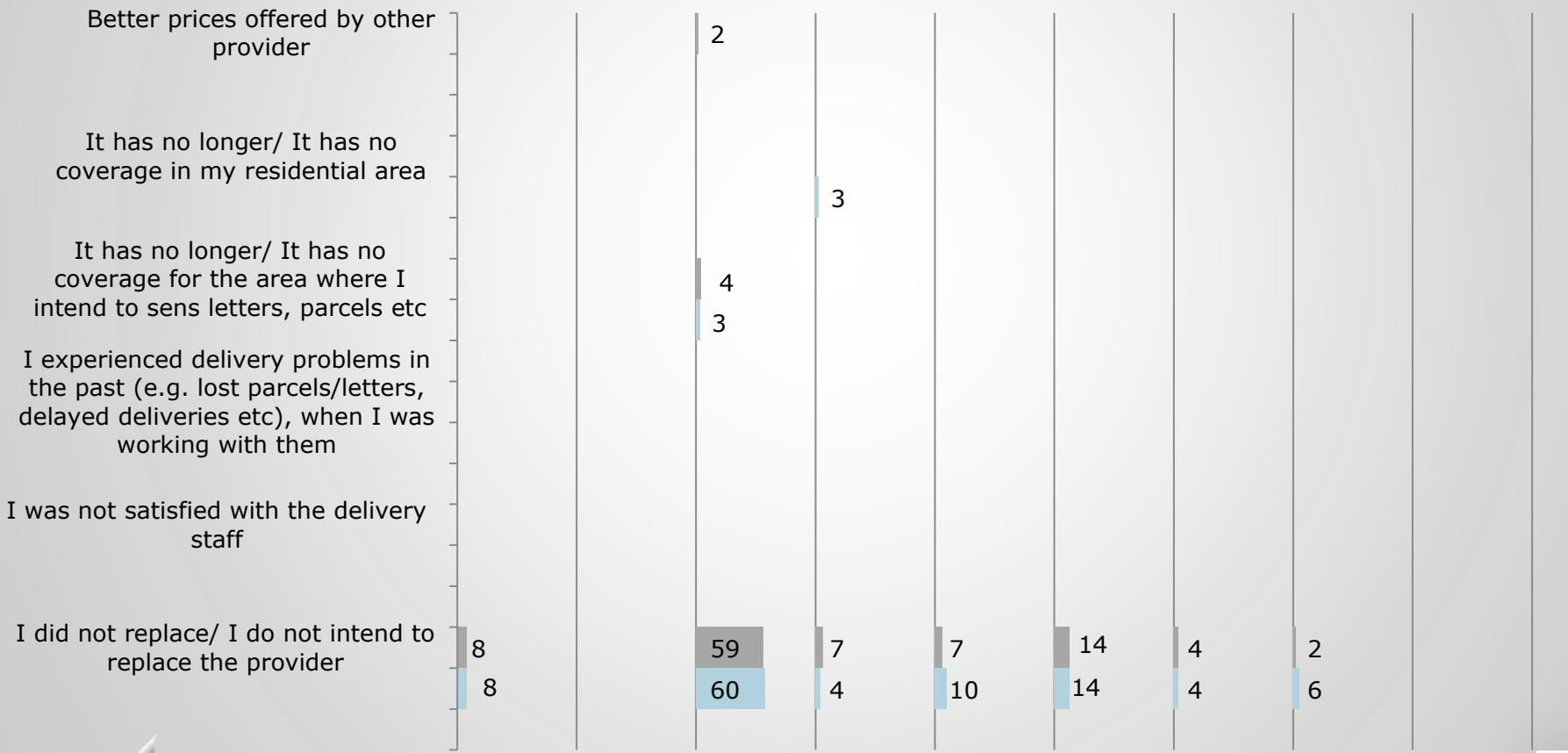
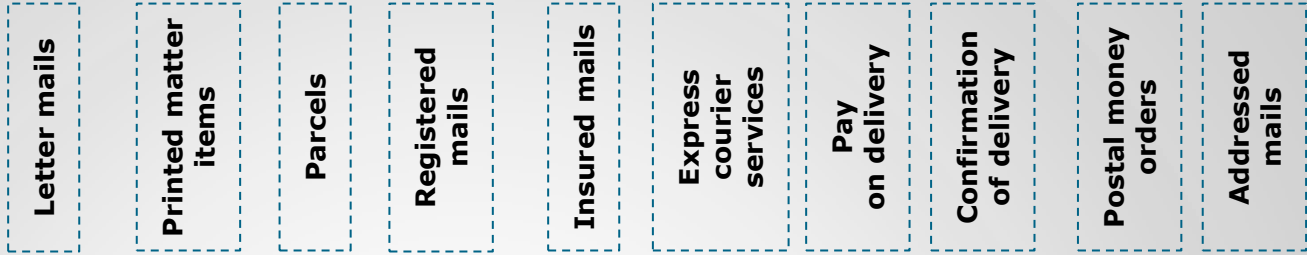
Base = users who use exclusively CN Poșta Română (n=1018)

The difference is represented by non-users

Reasons for Replacing the Provider – Past and Future, at National Level, amongst Users Who Use Only Other Providers Than CN Poșta Română

%

- Reasons for replacing the provider – in the past
- Reasons for replacing the provider – in the future

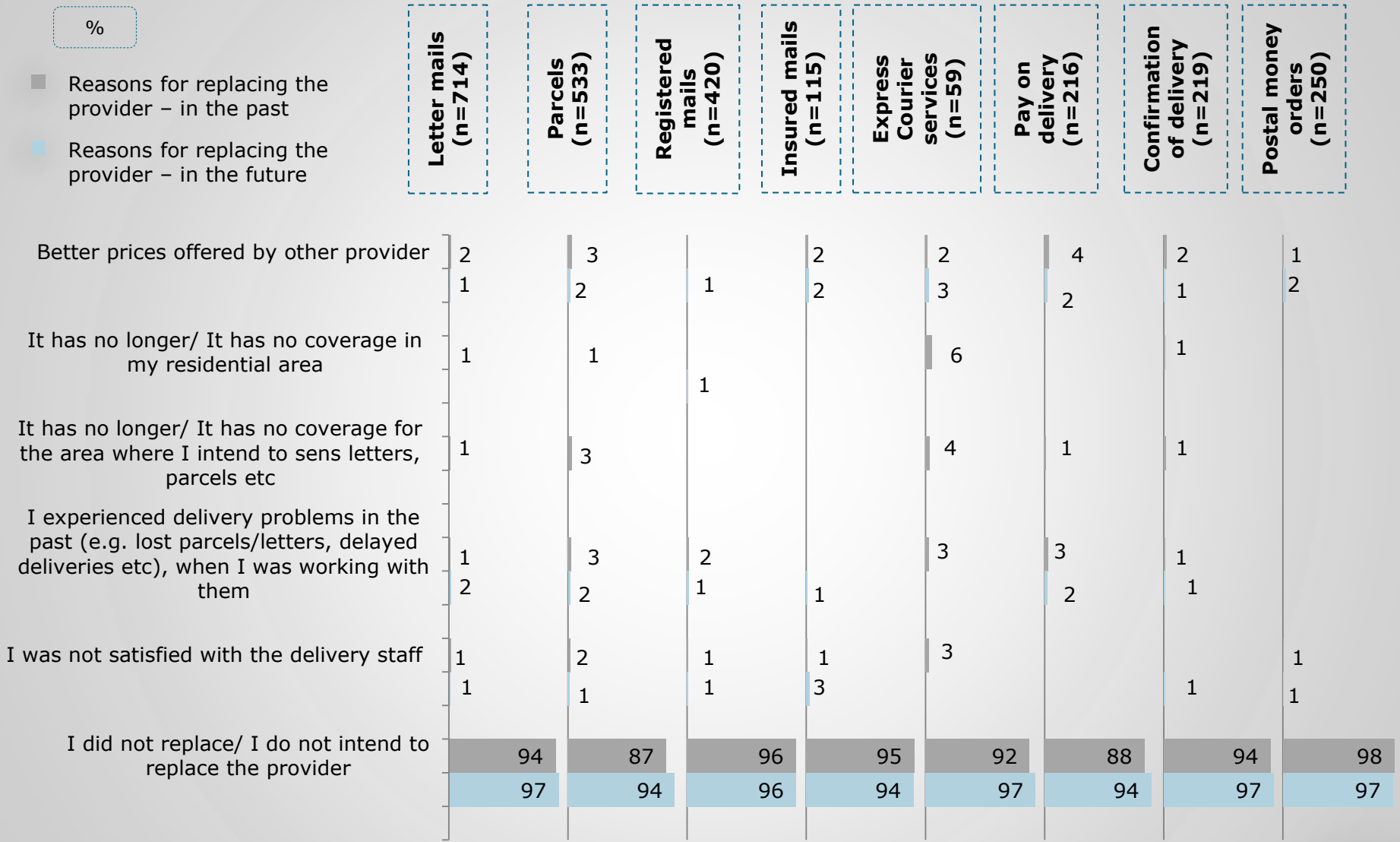


F6. For what reasons did you replace the provider for [SERVICE]?
 F9. What reasons determine you to change the provider for [SERVICE]?

Base = users who use exclusively providers other than CN Poșta Română (n=45)

The difference is represented by non-users

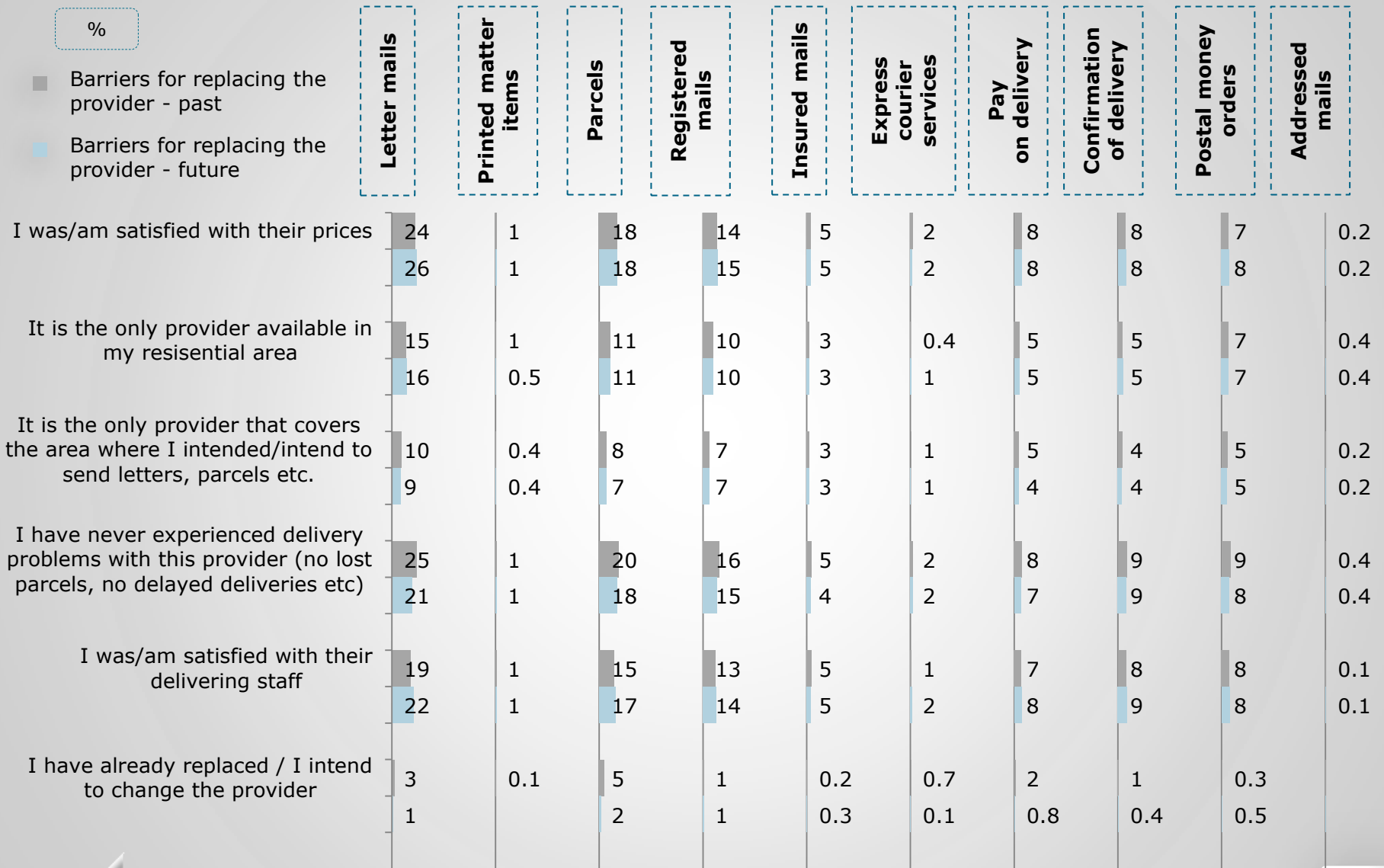
Reasons for Replacing the Provider – Past and Future, at National Level, amongst Postal Services Users



F6. For what reasons did you replace the provider for [SERVICE]?
 F9. What reasons determine you to change the provider for [SERVICE]?



Barriers for Replacing the Provider – Past and Future, at National Level



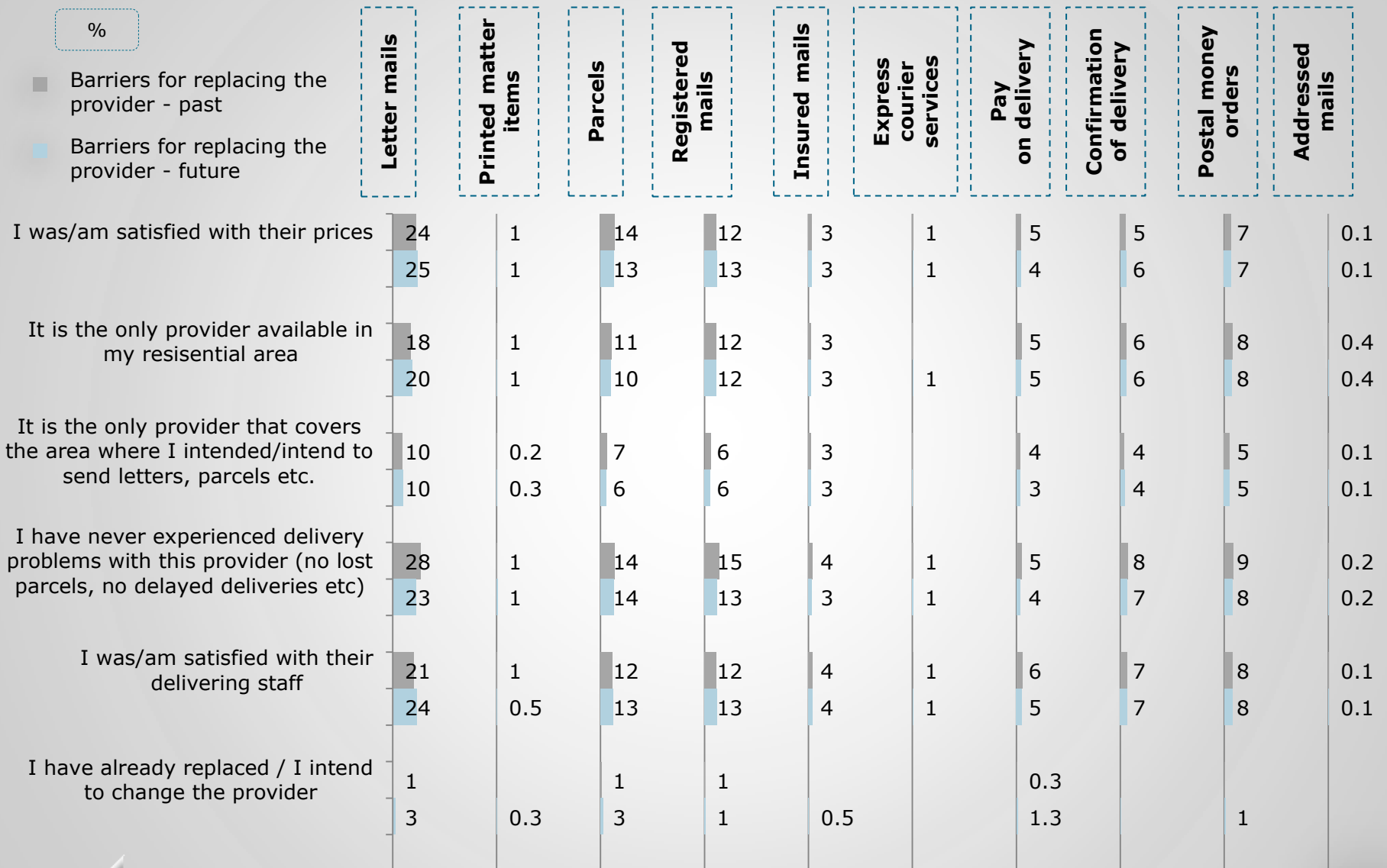
F7. For what reasons did you decide to not replace your provider for [SERVICE]?
 F10. For what reasons did you decide to maintain the provider for [SERVICE]?

Base = all postal services users (n=1466)

The difference is represented by non-users



Barriers for Replacing the Provider – Past and Future, at National Level, amongst Users Who Use Exclusively CN Poșta Română



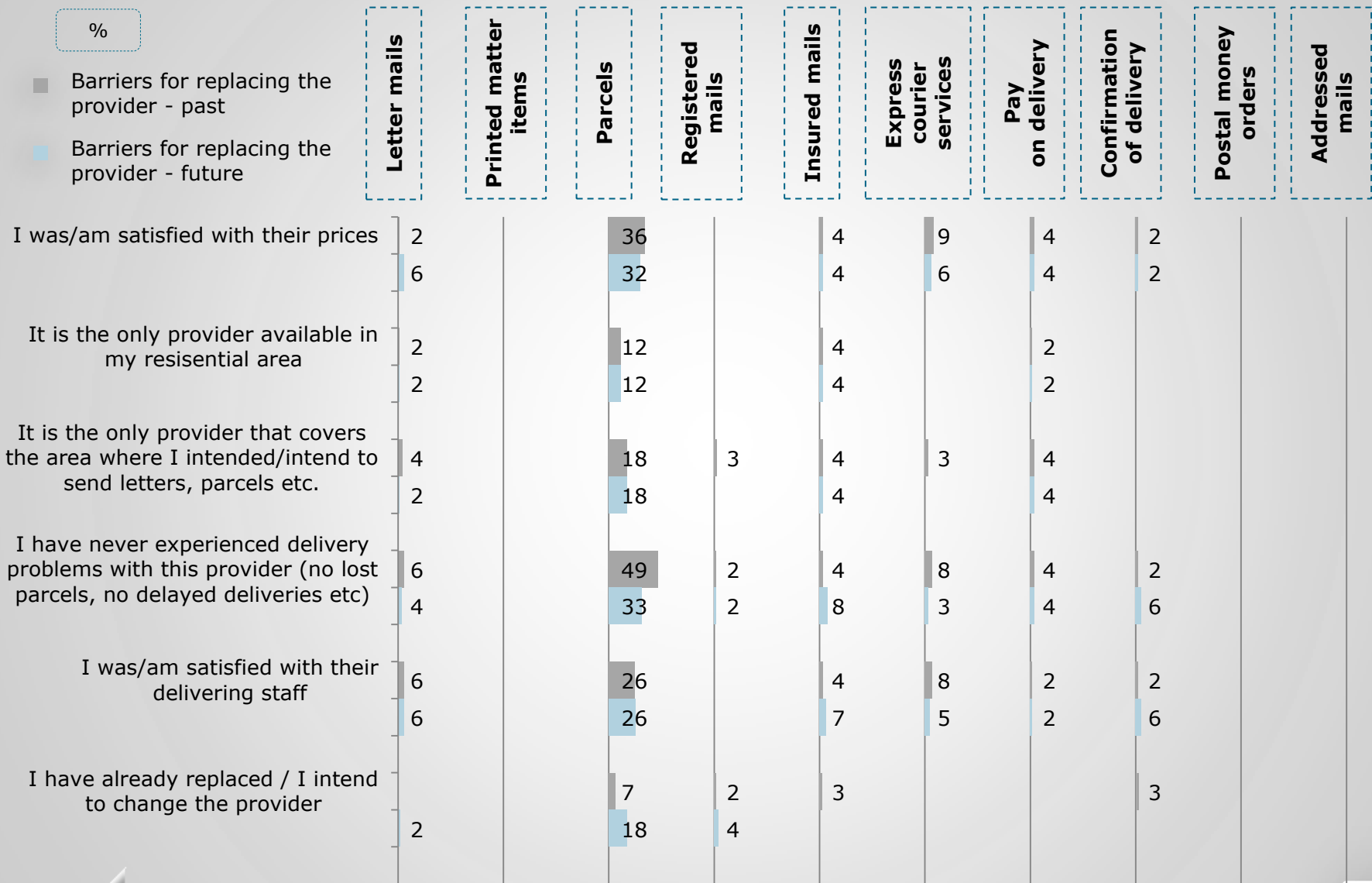
F7. For what reasons did you decide to not replace your provider for [SERVICE]?
 F10. For what reasons did you decide to maintain the provider for [SERVICE]?

Base = users who use exclusively CN Poșta Română (n=1018)

The difference is represented by non-users



Barriers for Replacing the Provider – Past and Future, at National Level, amongst Users Who Use Only Other Providers

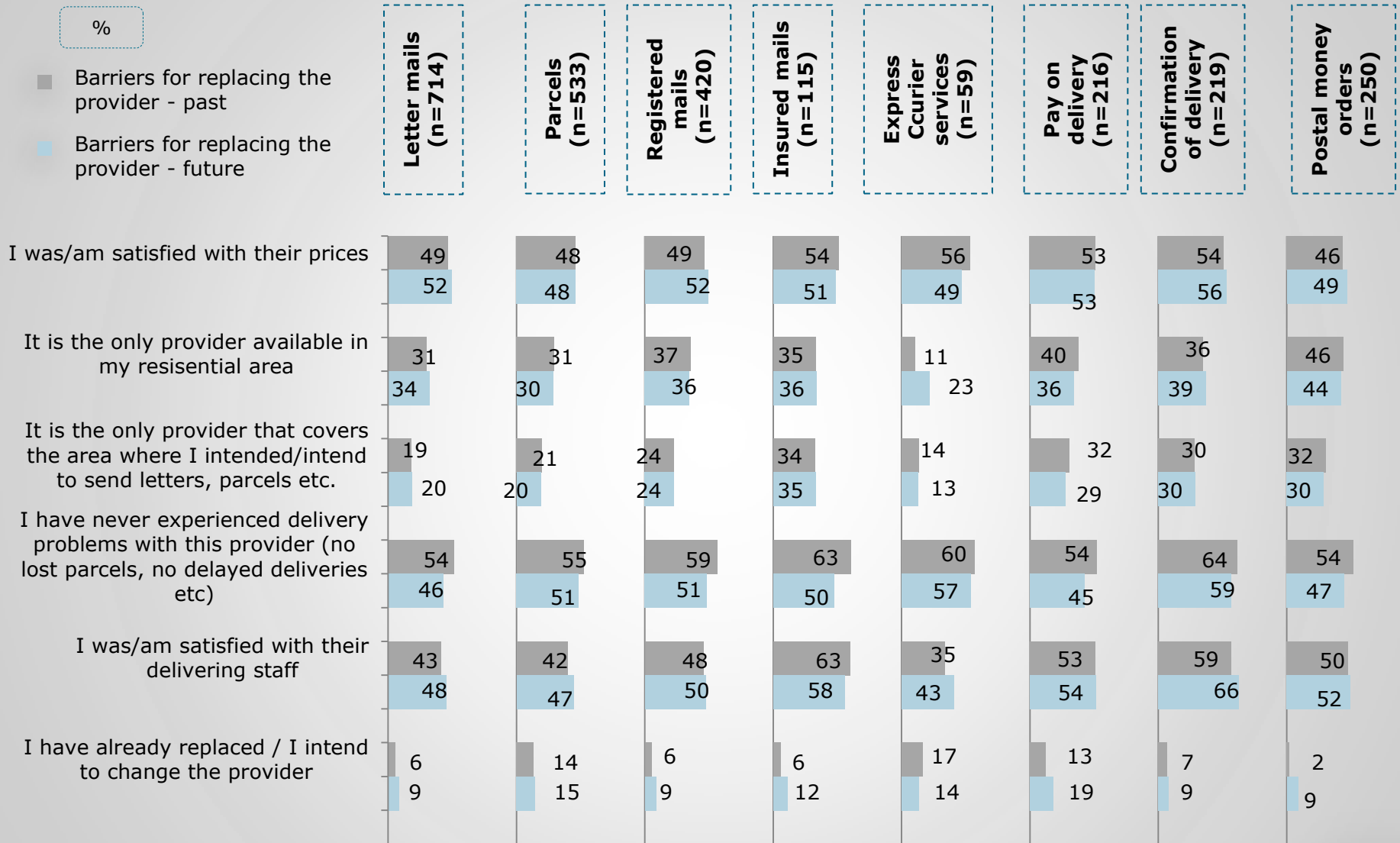


F7. For what reasons did you decide to not replace your provider for [SERVICE]?
 F10. For what reasons did you decide to maintain the provider for [SERVICE]?

Base = users who use exclusively providers other than CN Poșta Română (n=45)

The difference is represented by non-users

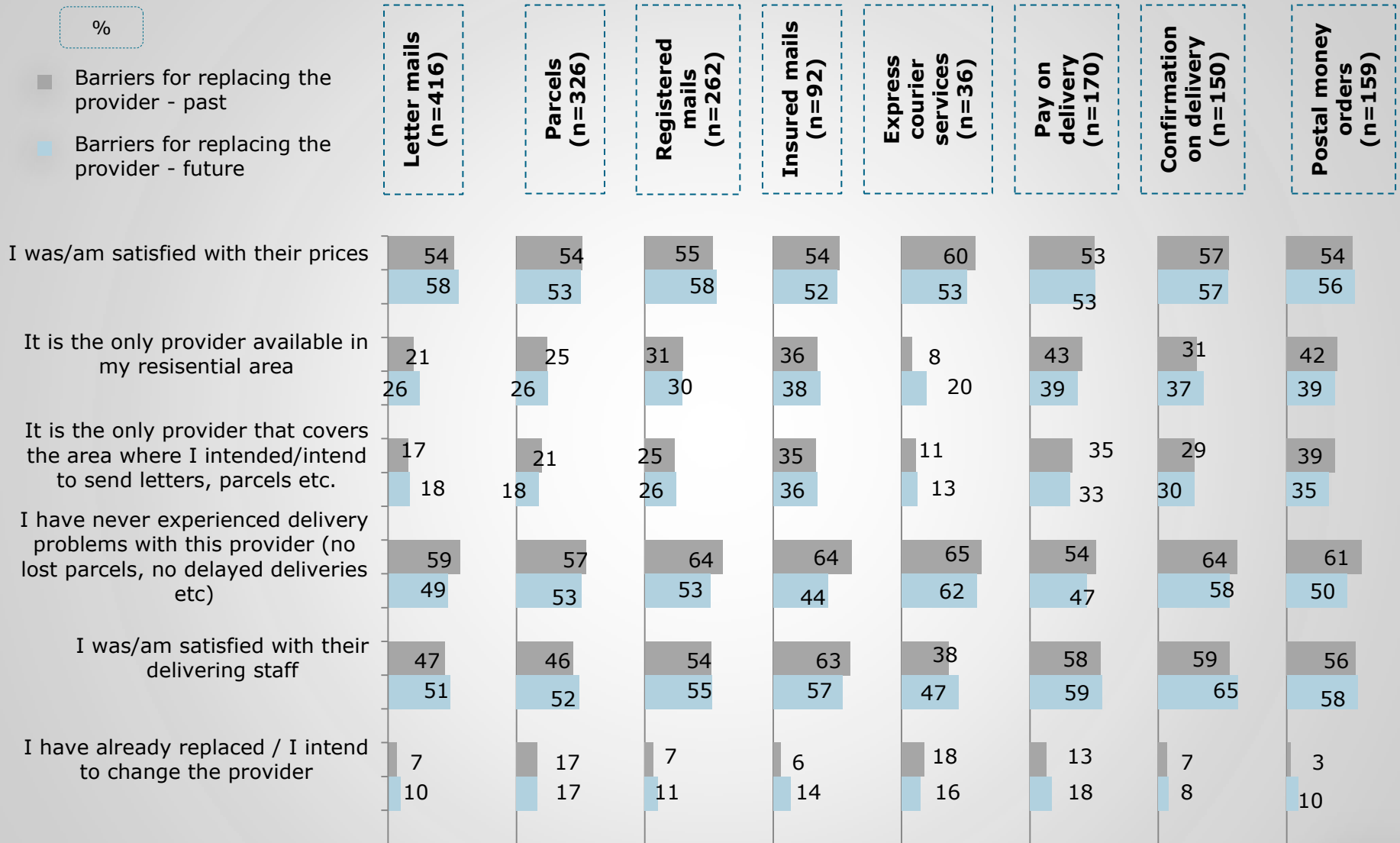
Barriers for Replacing the Provider – Past and Future, at National Level, amongst Postal Services Users



F7. For what reasons did you decide to not replace your provider for [SERVICE]?
 F10. For what reasons did you decide to maintain the provider for [SERVICE]?



Barriers for Replacing the Provider – Past and Future, at Urban Level, amongst Postal Services Users



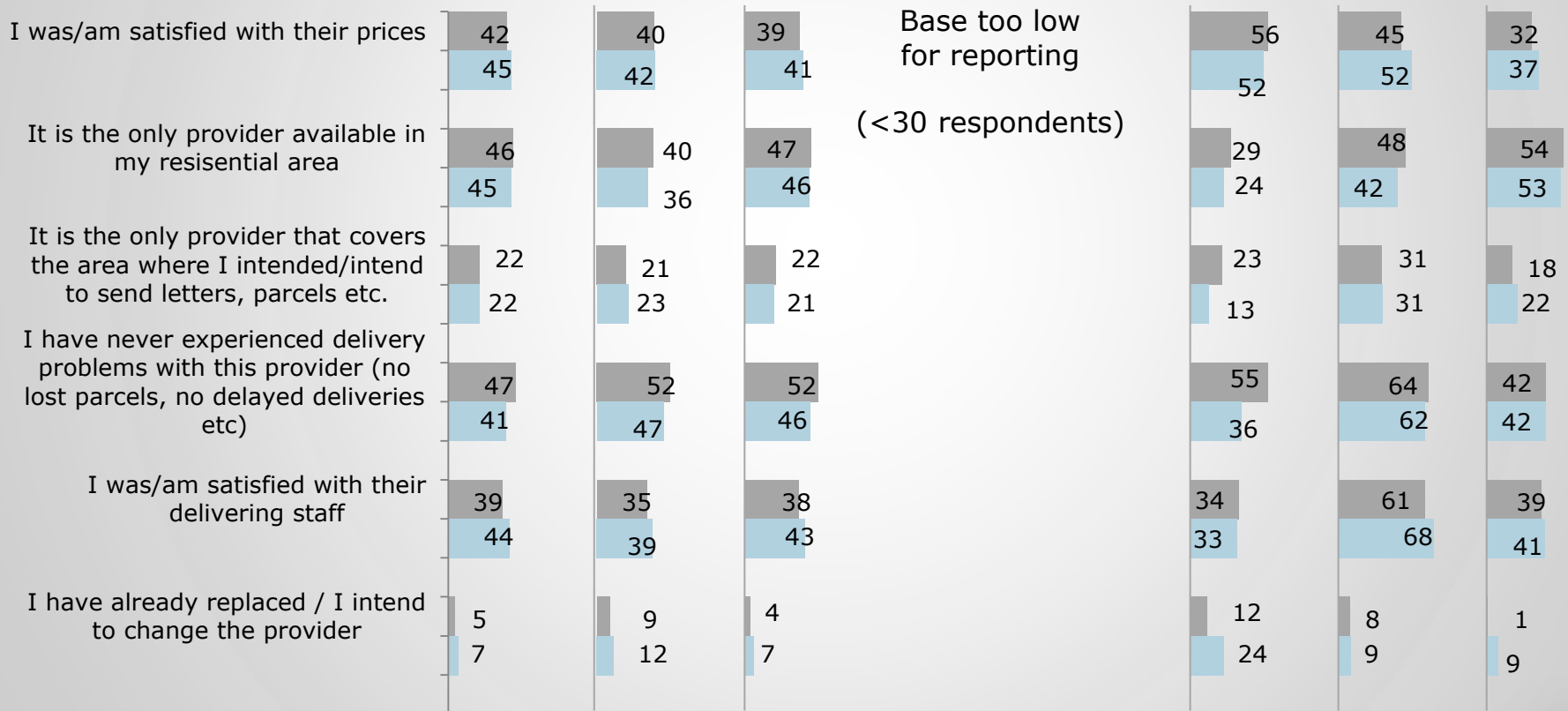
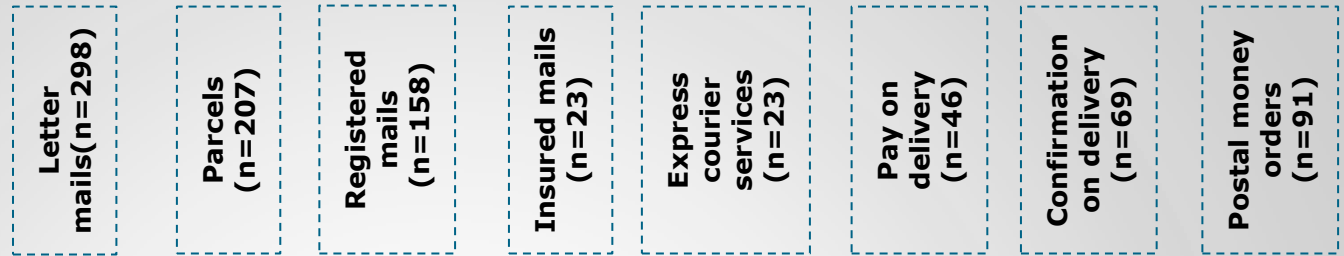
F7. For what reasons did you decide to not replace your provider for [SERVICE]?
 F10. For what reasons did you decide to maintain the provider for [SERVICE]?



Barriers for Replacing the Provider – Past and Future, at Rural Level amongst Postal Services Users

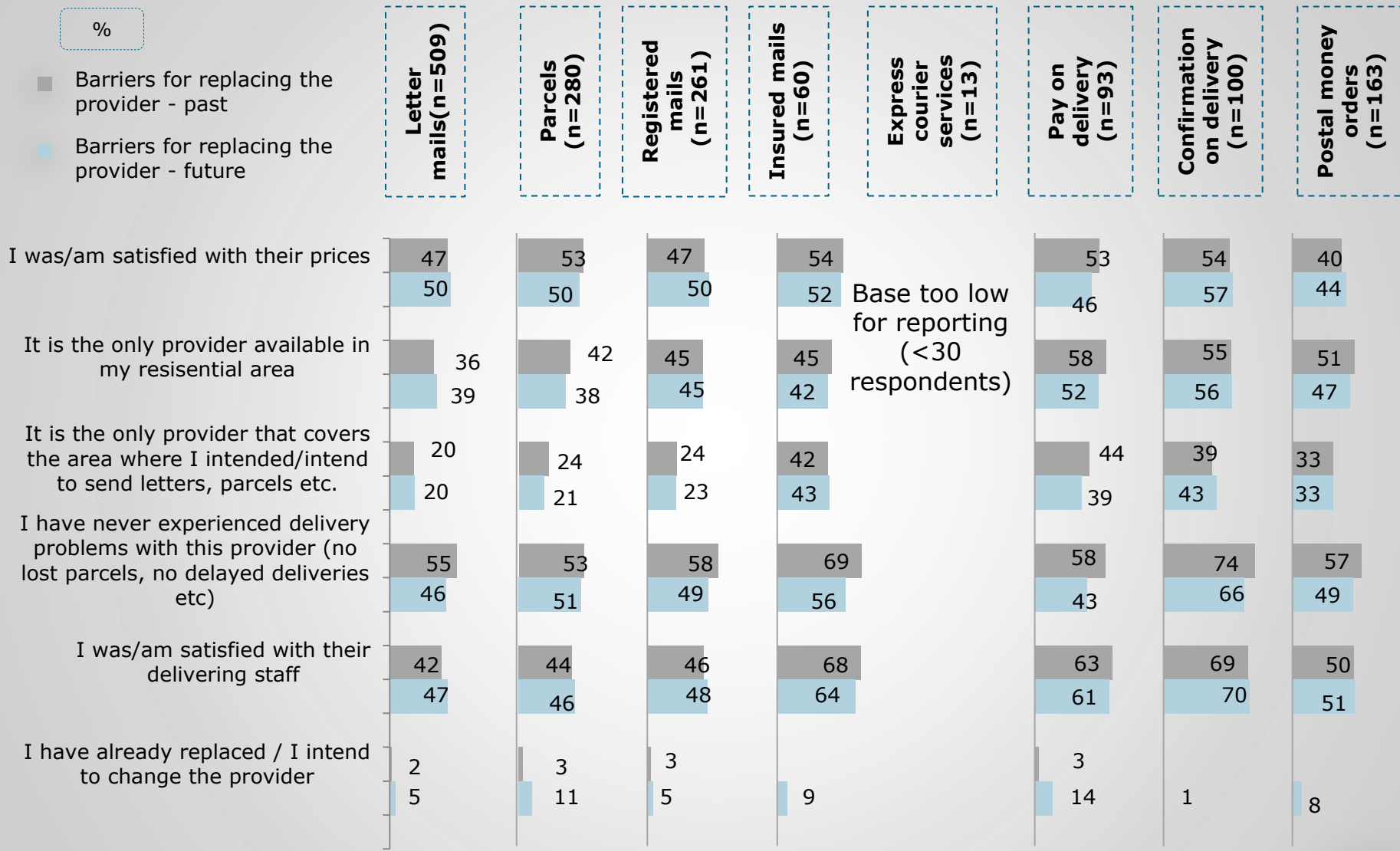
%

- Barriers for replacing the provider - past
- Barriers for replacing the provider - future



F7. For what reasons did you decide to not replace your provider for [SERVICE]?
 F10. For what reasons did you decide to maintain the provider for [SERVICE]?

Barriers for Replacing the Provider – Past and Future, amongst Postal Services Users, for Those Who Use Exclusively CN Poșta Română



F7. For what reasons did you decide to not replace your provider for [SERVICE]?
 F10. For what reasons did you decide to maintain the provider for [SERVICE]?



Backgrounds and Goals

Methodology

Key Findings

Awareness and Usage of Postal
Services

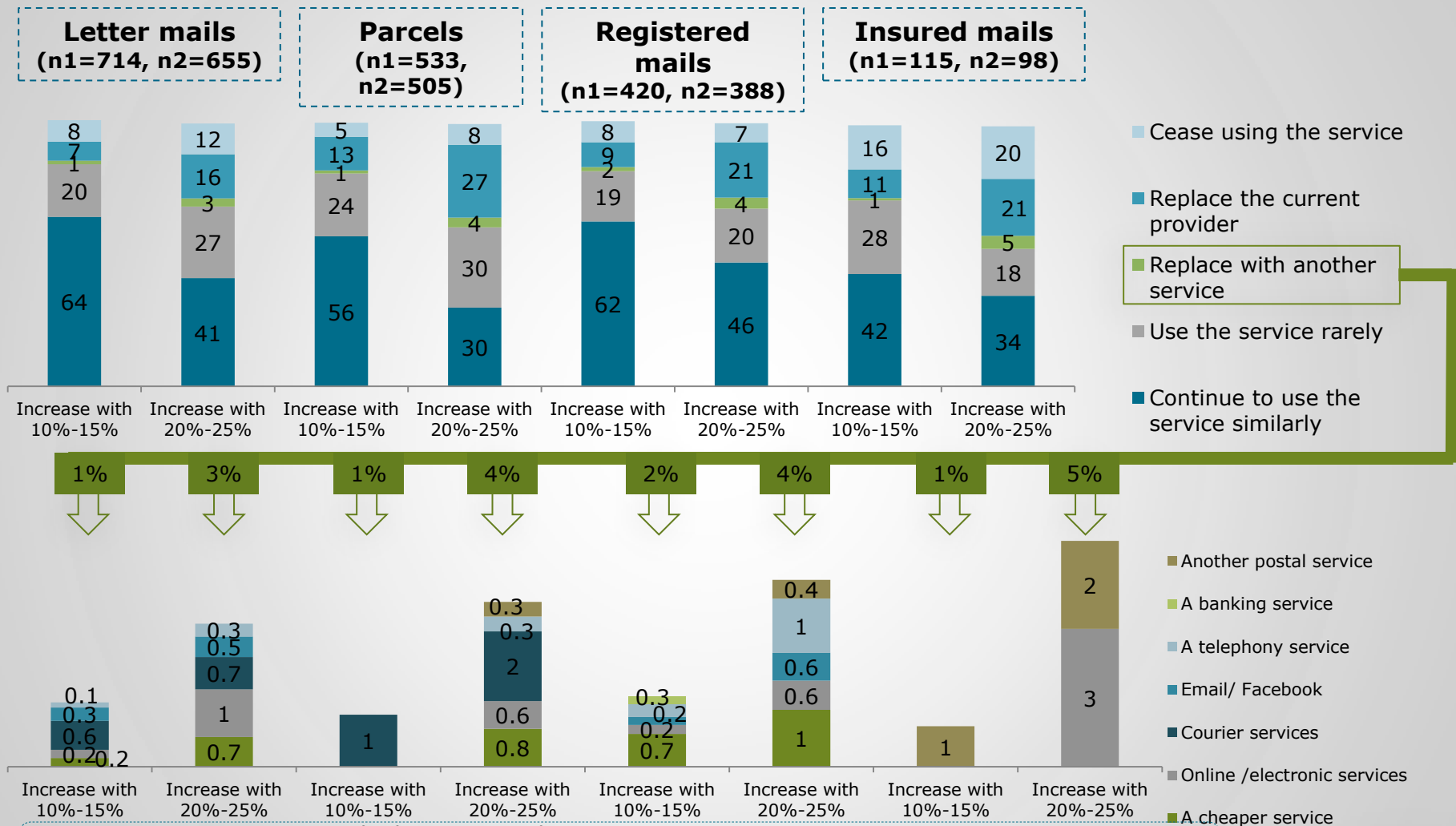
Postal Services Providers

Substitutability

Demographic Profile



Behavior in Case of Raised Prices for Postal Services amongst Users at National Level (part I)

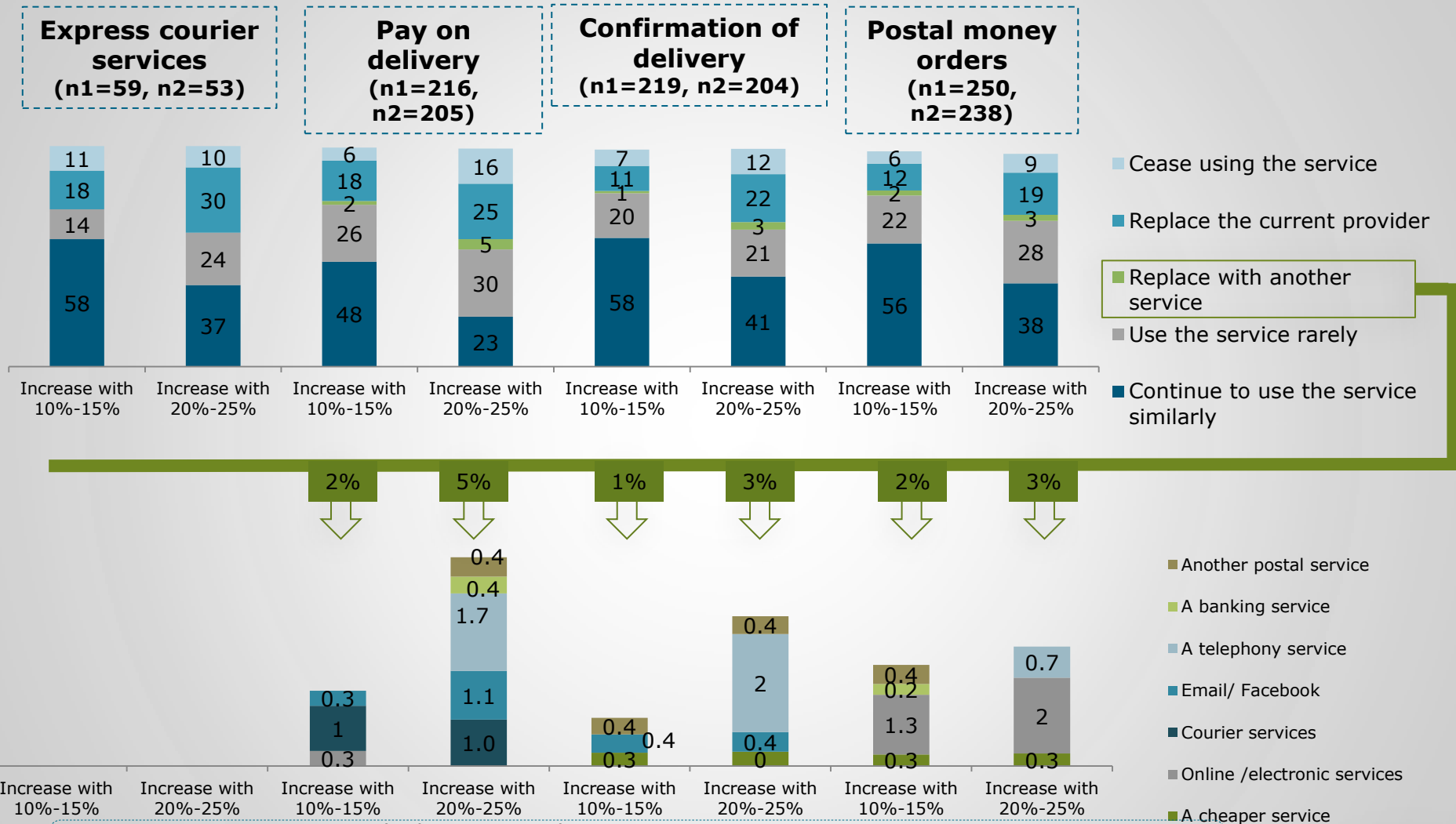


Base n1= service users over the last 12 months.

Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.

U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
 U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

Behavior in Case of Raised Prices for Postal Services amongst Users at National Level (part II)

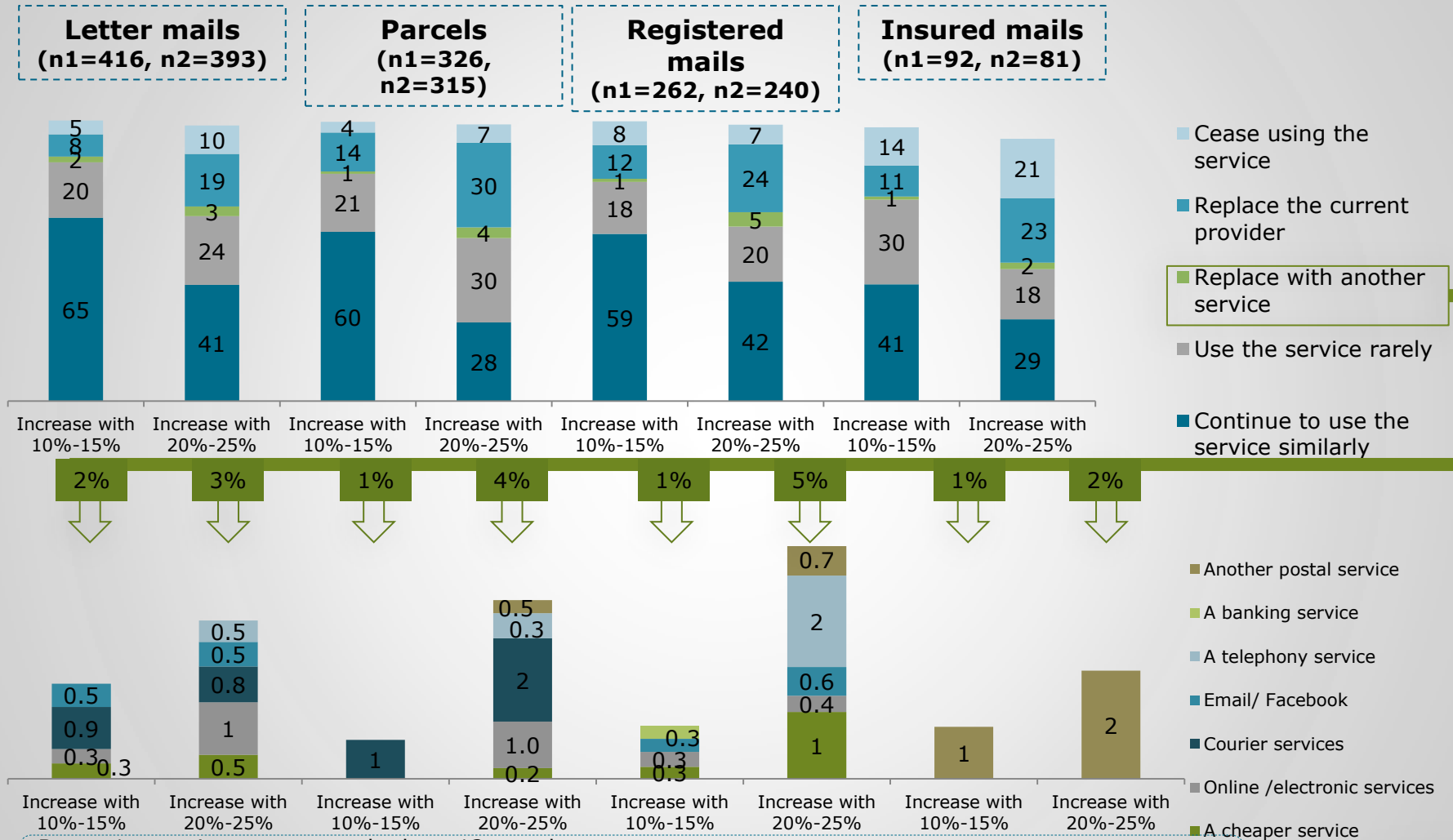


Base n1= service users over the last 12 months.

Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.

U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
 U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

Behavior in Case of Raised Prices for Postal Services amongst Users at Urban Level (part I)

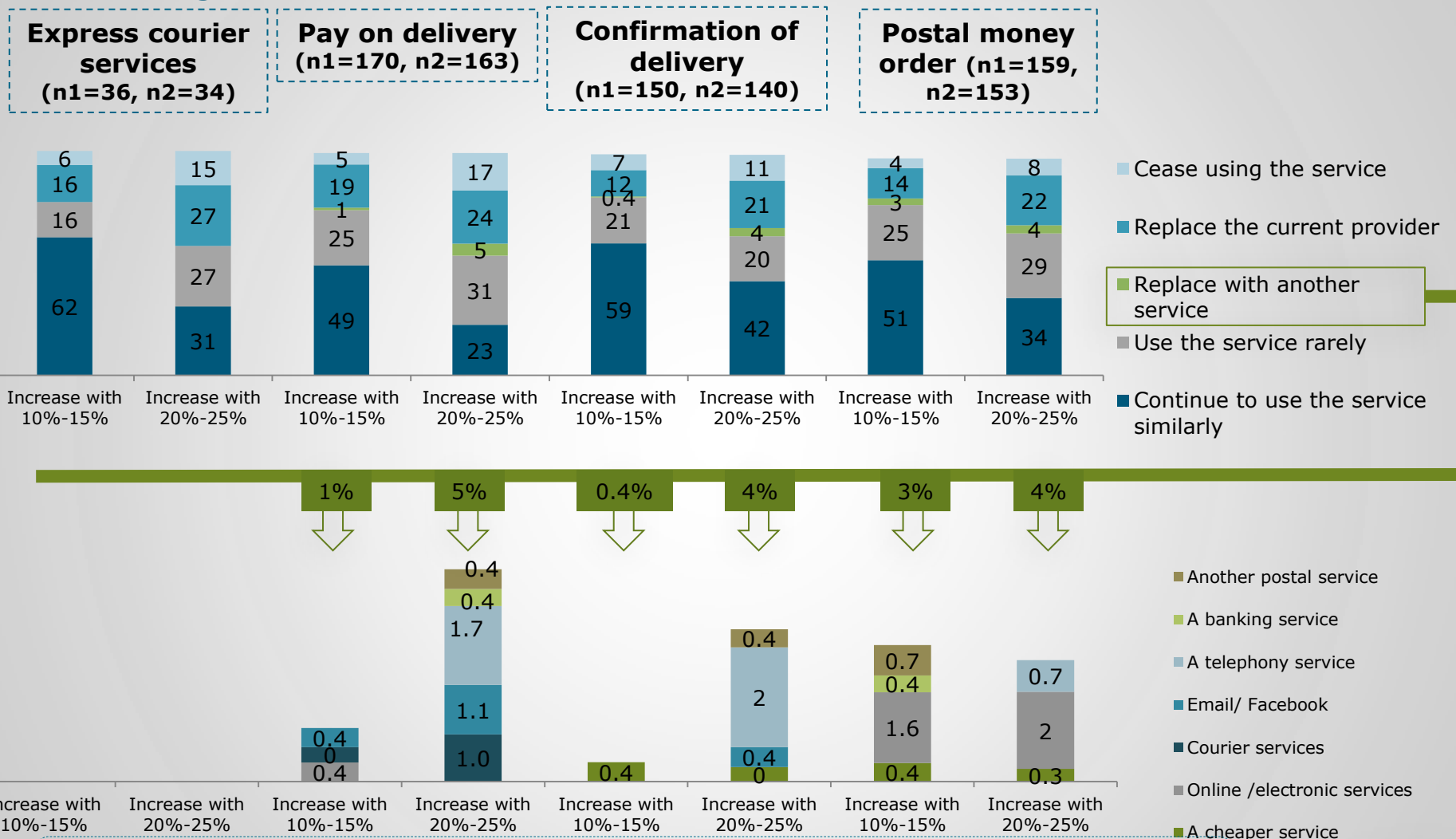


Base n1= service users over the last 12 months.

Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.

U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
 U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

Behavior in Case of Raised Prices for Postal Services amongst Users at Urban Level (part II)



Base n1= service users over the last 12 months.
 Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.

U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
 U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

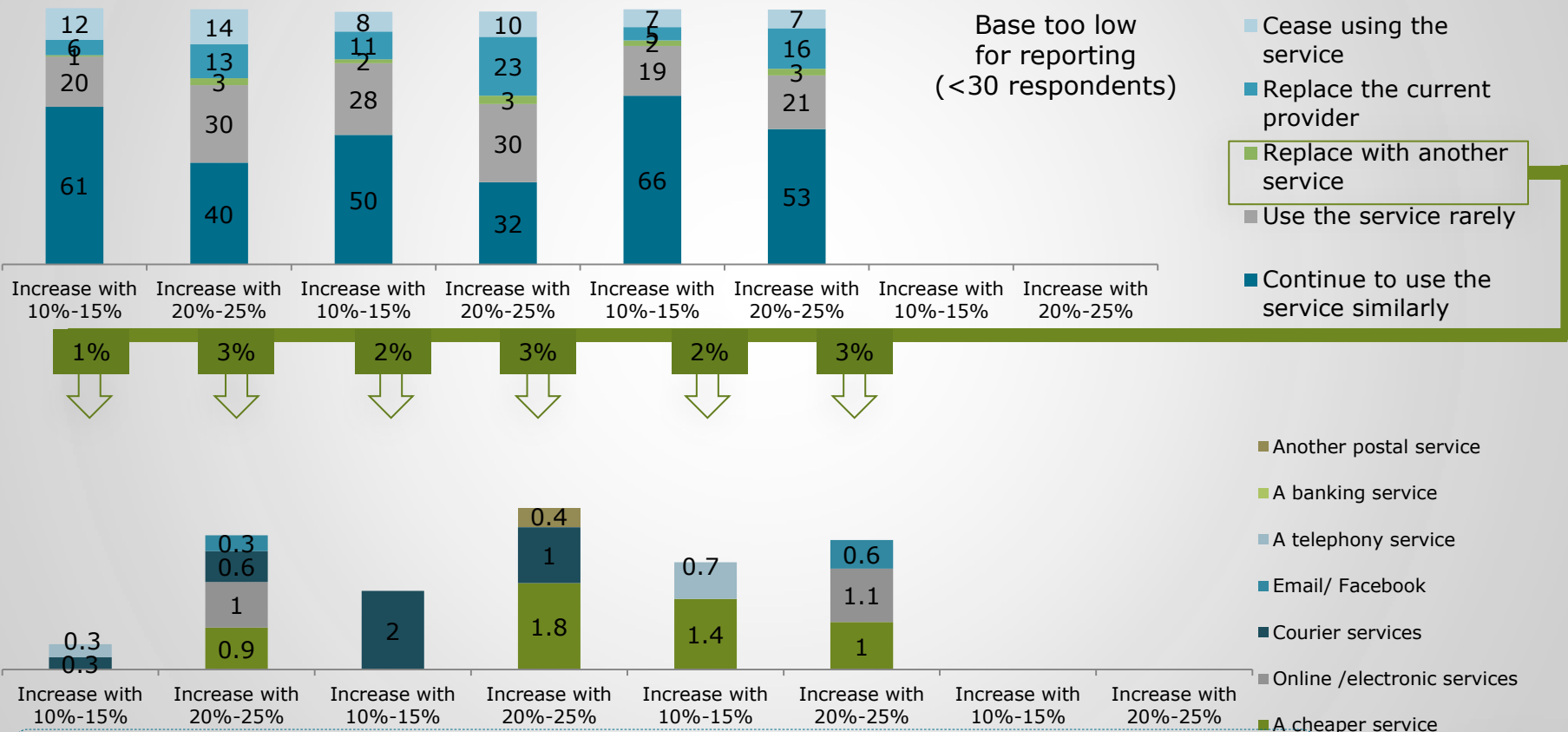
Behavior in Case of Raised Prices for Postal Services amongst Users at Rural Level (part I)

Letter mails
(n1=298, n2=262)

Parcels
(n1=207, n2=190)

Registered mails
(n1=158, n2=148)

Insured mails
(n1=23, n2=17)



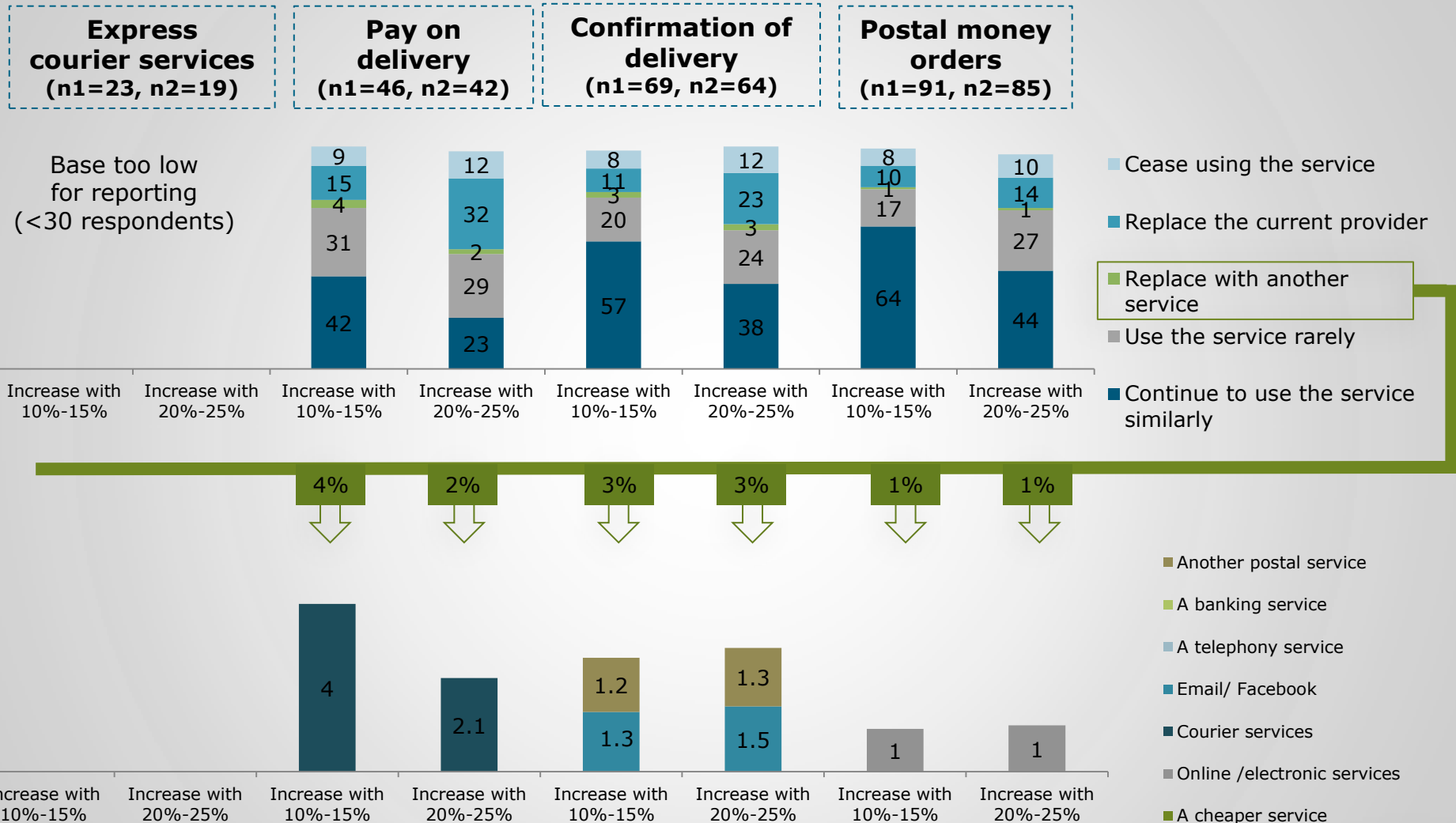
Base too low for reporting (<30 respondents)

Base n1= service users over the last 12 months.
Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.



U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

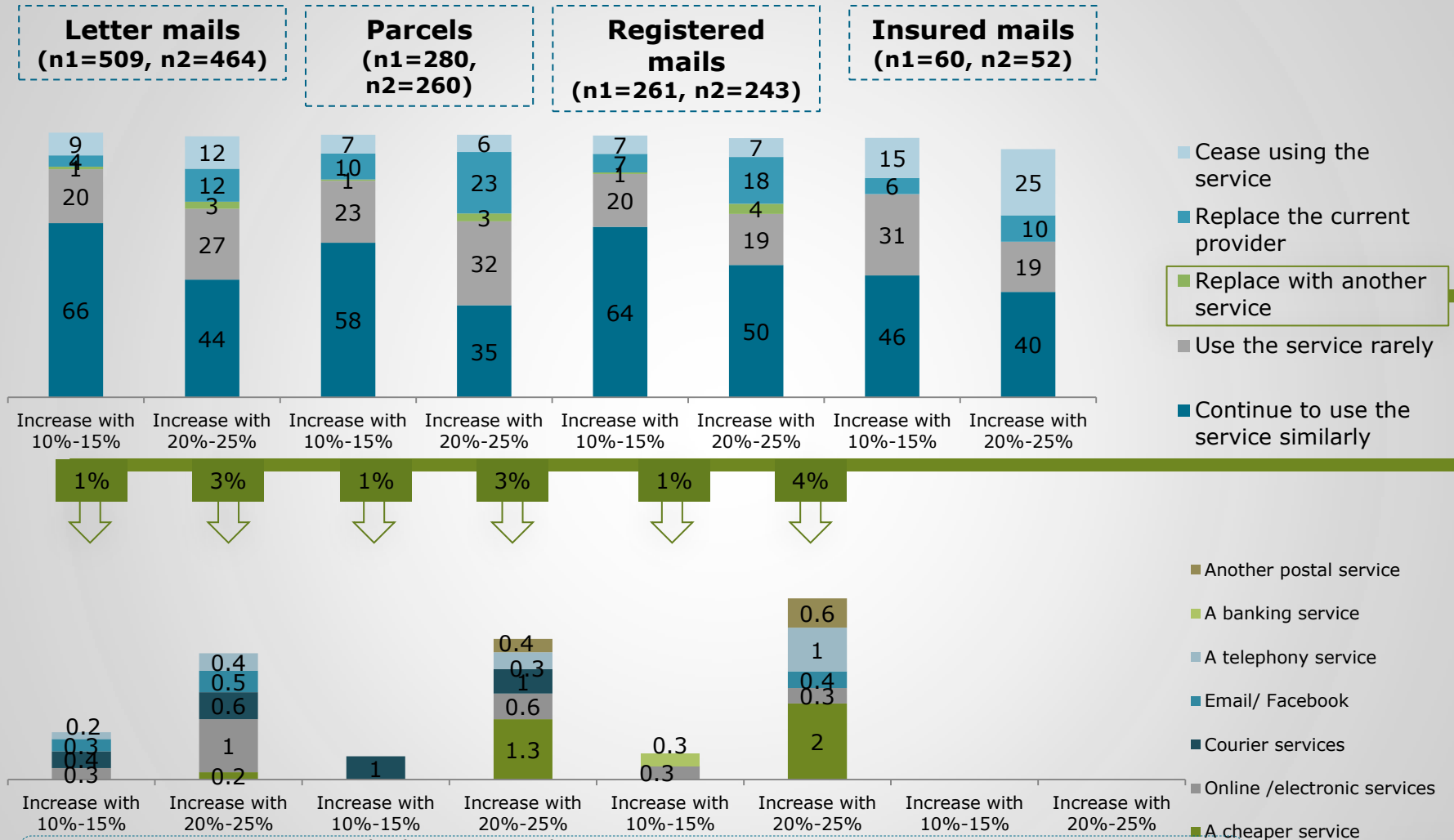
Behavior in Case of Raised Prices for Postal Services amongst Users at Rural Level (part II)



Base n1= service users over the last 12 months.
 Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.

U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
 U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

Behavior in Case of Raised Prices for Postal Services amongst Users Who Use Exclusively CN Poșta Română (part I)

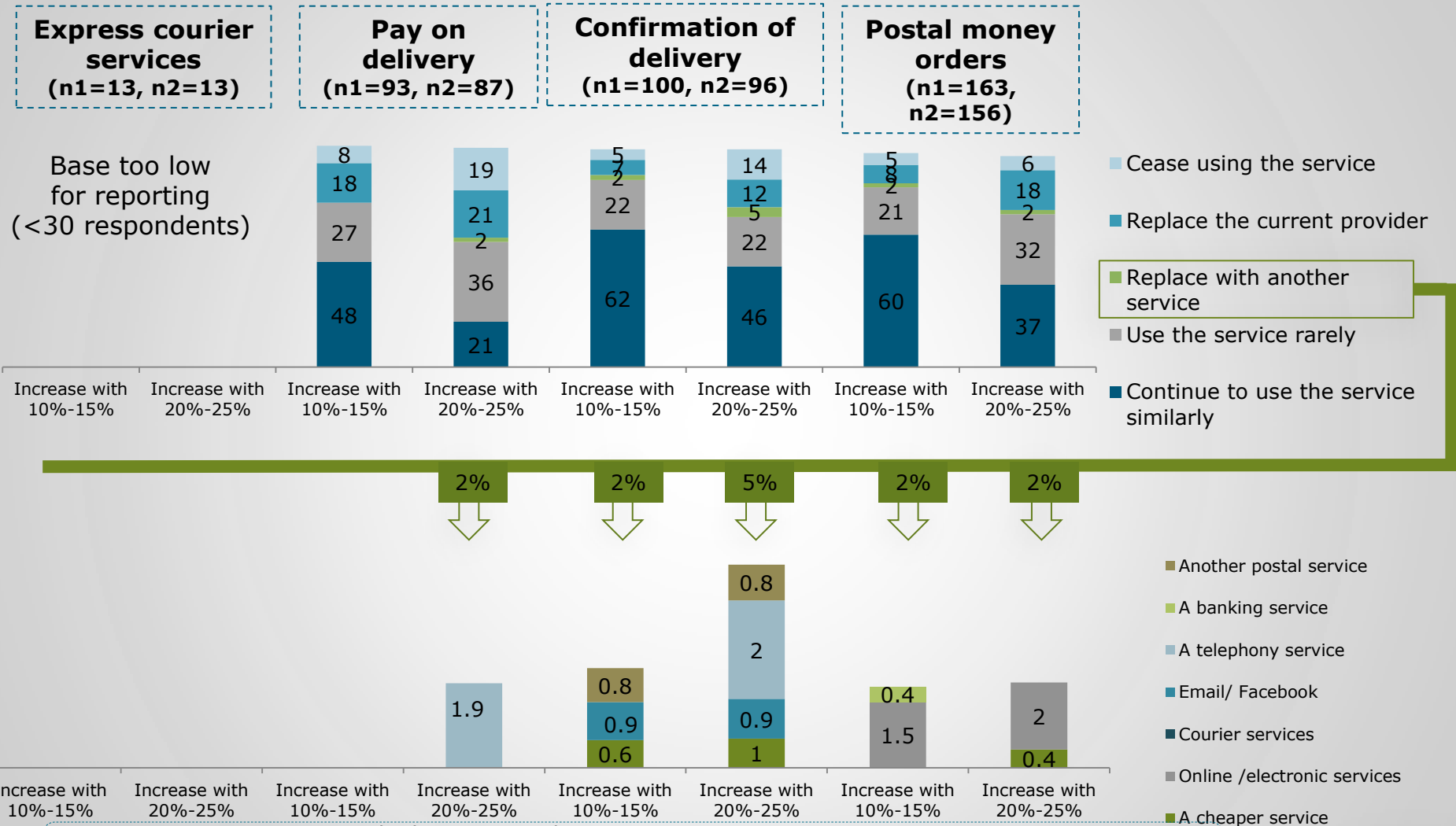


Base n1= service users over the last 12 months.

Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.

U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
 U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

Behavior in Case of Raised Prices for Postal Services amongst Users Who Use Exclusively CN Poșta Română (part II)



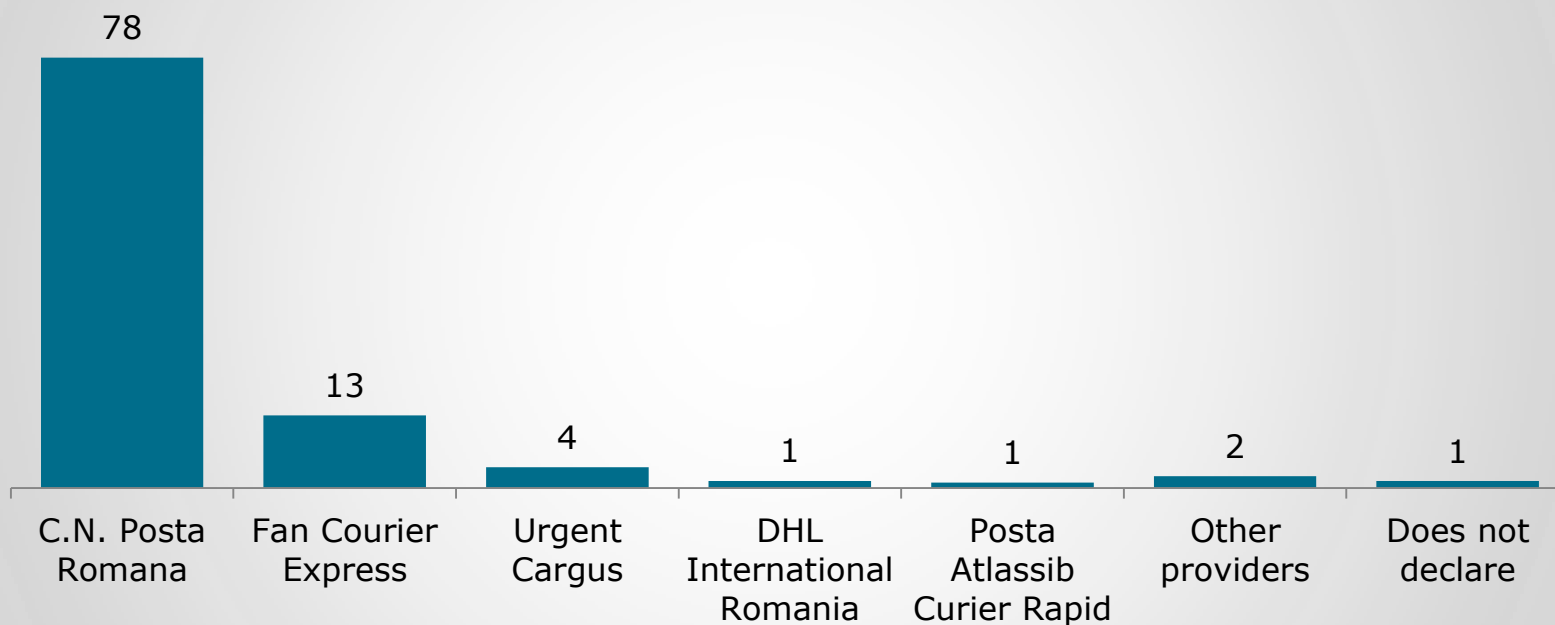
Base n1= service users over the last 12 months.

Base n2= service users over the last 12 months, who intend to replace it in case of an increase of 10-15% in prices.

U5. What do you intend to do, if the price for [SERVICE] would increase with 10%-15%?
 U6. What do you intend to do, if the price for [SERVICE] would increase with 20%-25%?

Preferred Provider, at Similar Prices and Quality

%



Base = all postal services users
(n=1466)

?

S0. If all providers would offer the same quality and similar prices for their services, what provider you choose for letter mail and parcels?



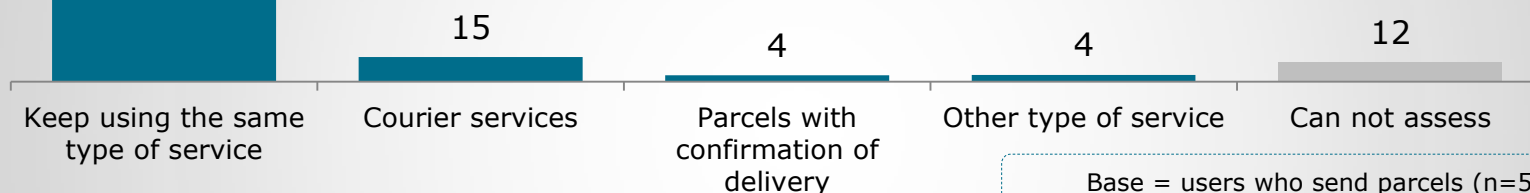
Substitutability for Letter Mail – amongst Users of Any Provider

%



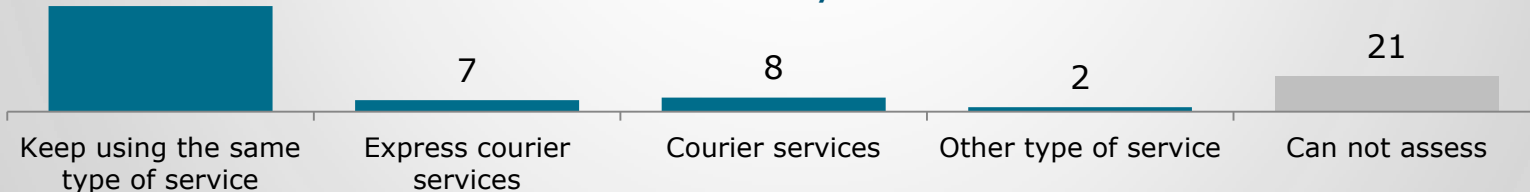
Base = users who send letter mails (n=714)

Substitutability for Parcels – amongst Users of Any Provider



Base = users who send parcels (n=533)

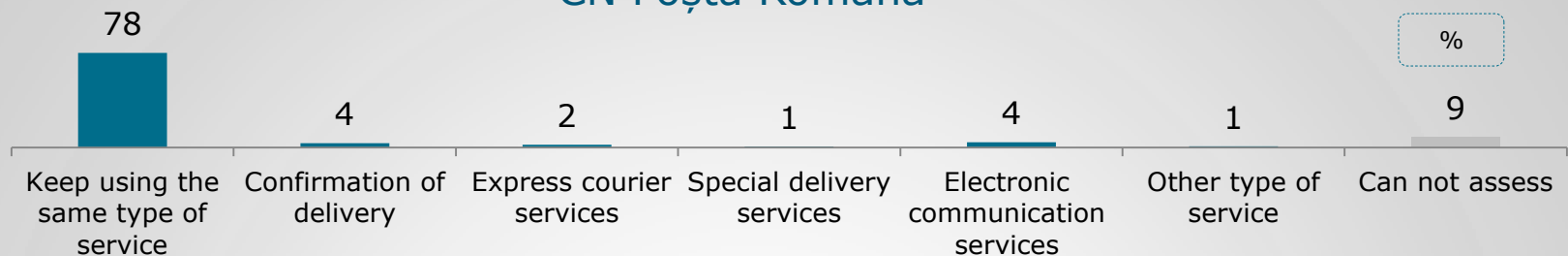
Substitutability for Registered Mail – amongst Users of Any Provider



Base = users who send registered mails (n=420)

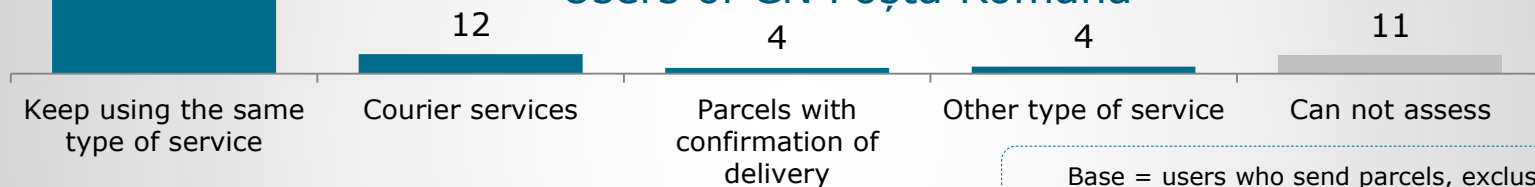
- S1. What do you intend to do in case of an increase about 10-15% of prices for sending letter mail?
 S3. What do you intend to do in case of an increase about 10-15% of prices for sending parcels (inclusively for parcels bought through e-commerce)?
 S4. What do you intend to do in case of an increase about 10-15% of prices for sending registered mail?

Substitutability for Letter Mail – amongst Users Who Use Exclusively CN Poșta Română



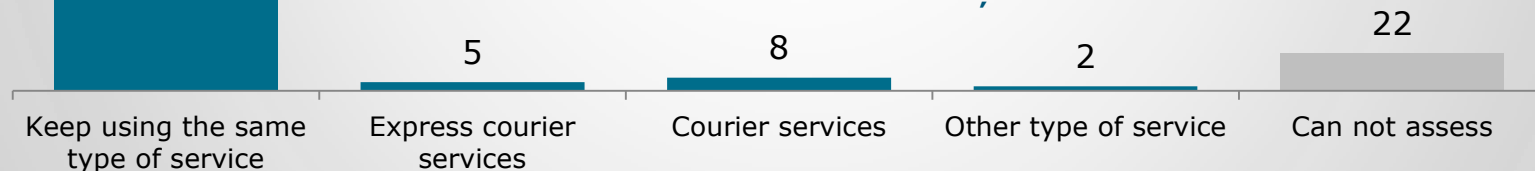
Base = users who send letter mails, exclusively through CN Poșta Română (n=509)

Substitutability for Parcels – amongst Exclusive Users of CN Poșta Română



Base = users who send parcels, exclusively through CN Poșta Română (n=280)

Substitutability for Registered Mail – amongst Exclusive Users of CN Poșta Română



Base = users who send registered mails, exclusively through CN Poșta Română (n=261)

- S1. What do you intend to do in case of an increase about 10-15% of prices for sending letter mail?
 S3. What do you intend to do in case of an increase g about 10-15% of prices for sending parcels (inclusively for parcels bought through e-commerce)?
 S4. What do you intend to do in case of an increase about 10-15% of prices for sending registered mail?

Backgrounds and goals

Methodology

Key Findings

Awareness and Usage of Postal
Services

Postal Services Providers

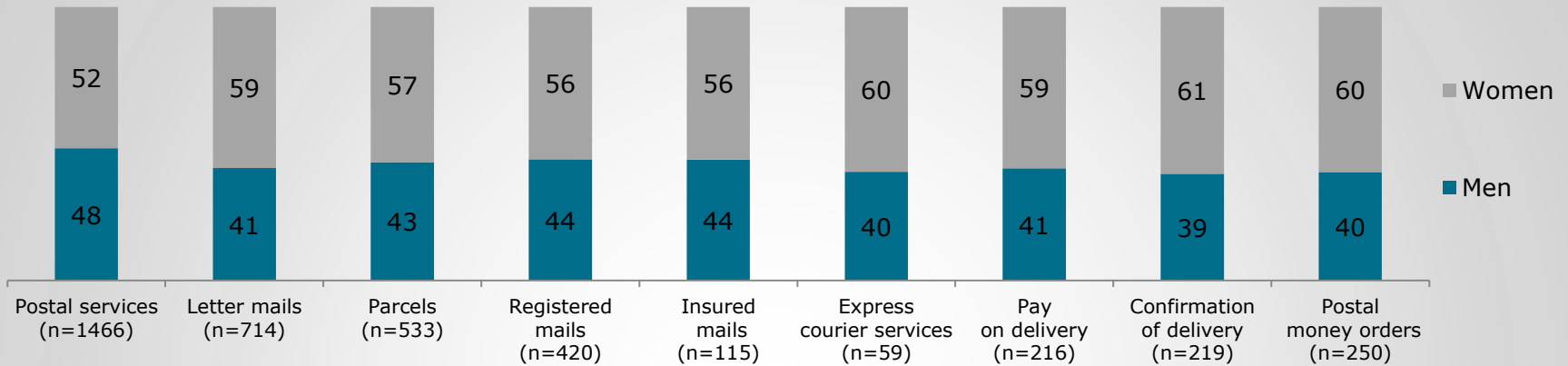
Substitutability

Demographic Profile

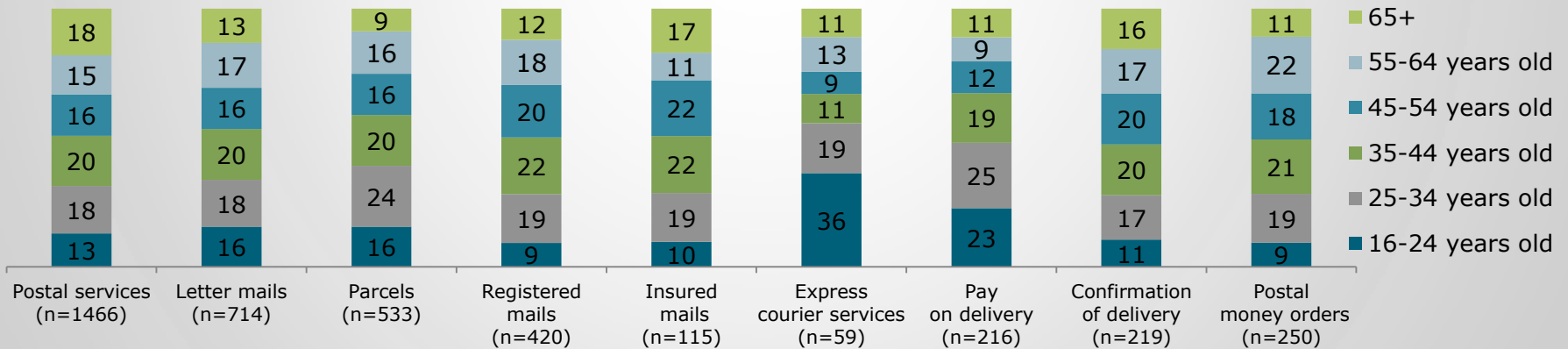


Users Demographics

Gender



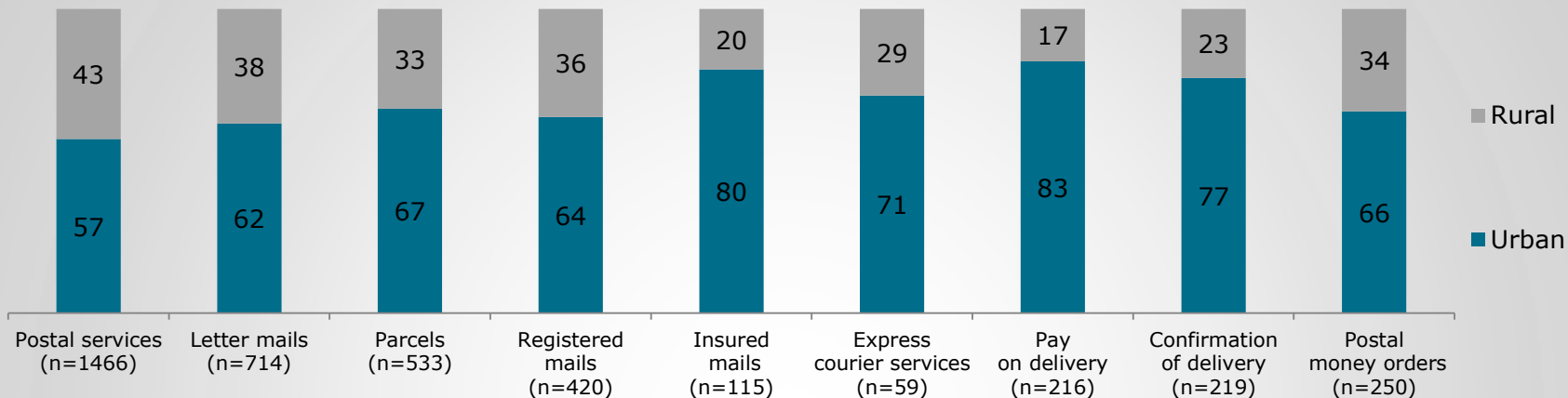
Age



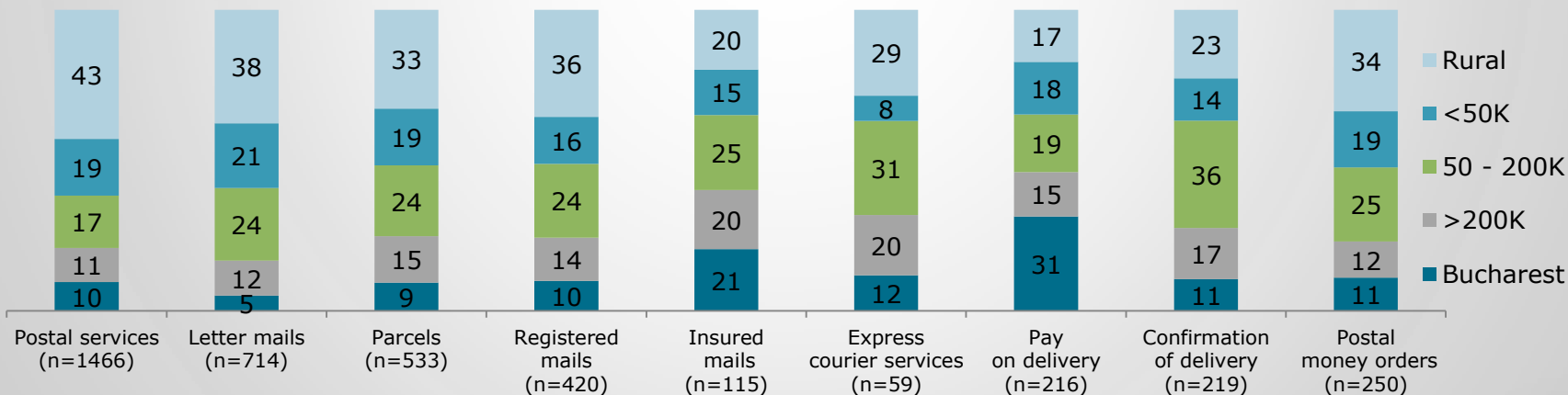
* Only for services used by at least 30 respondents

Users Demographics

Residence



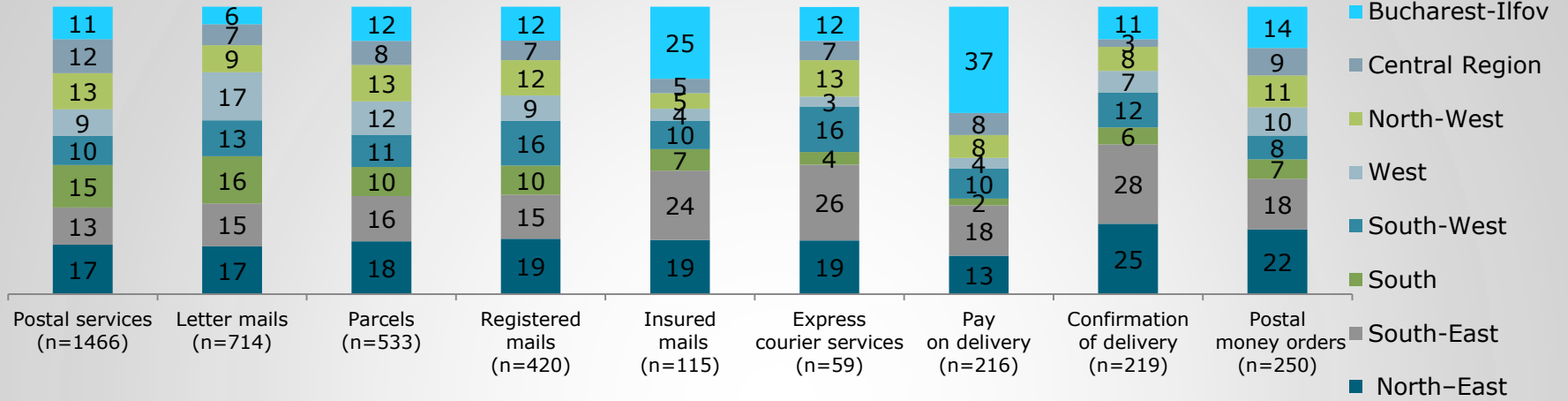
Location Size



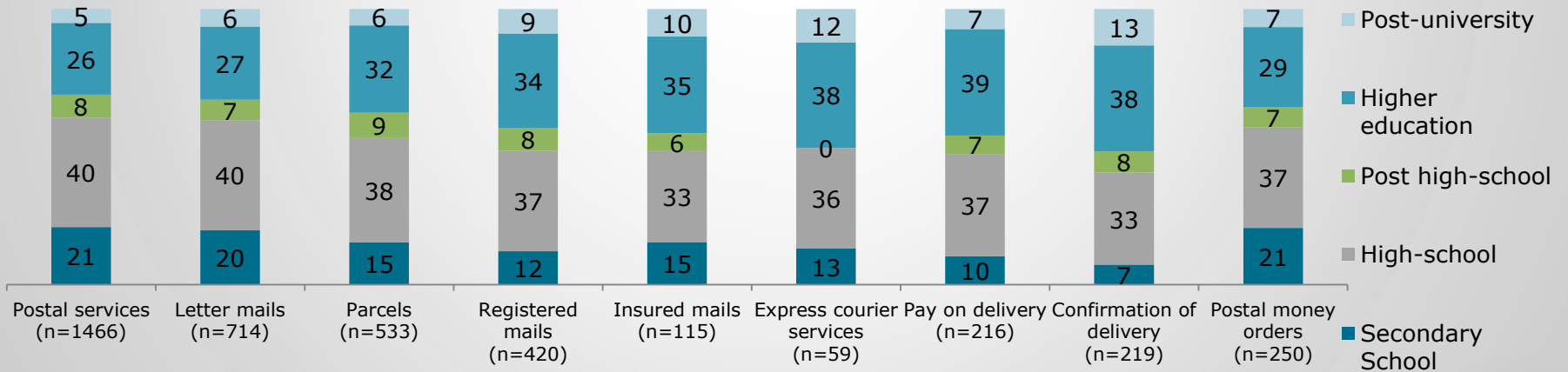
* Only for services used by at least 30 respondents

Users Demographics

Region



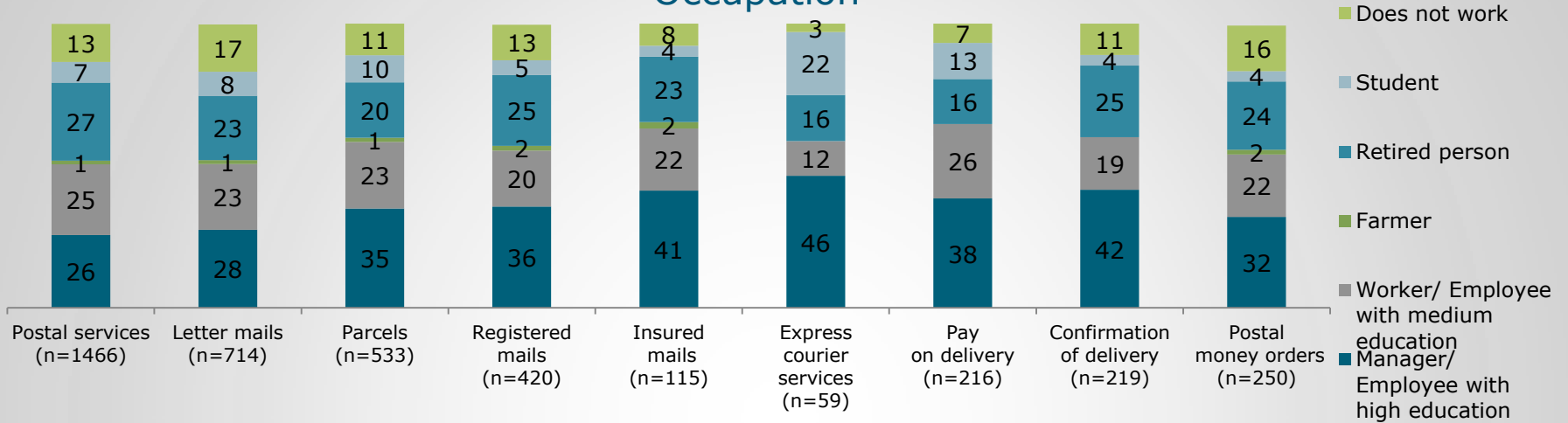
Education



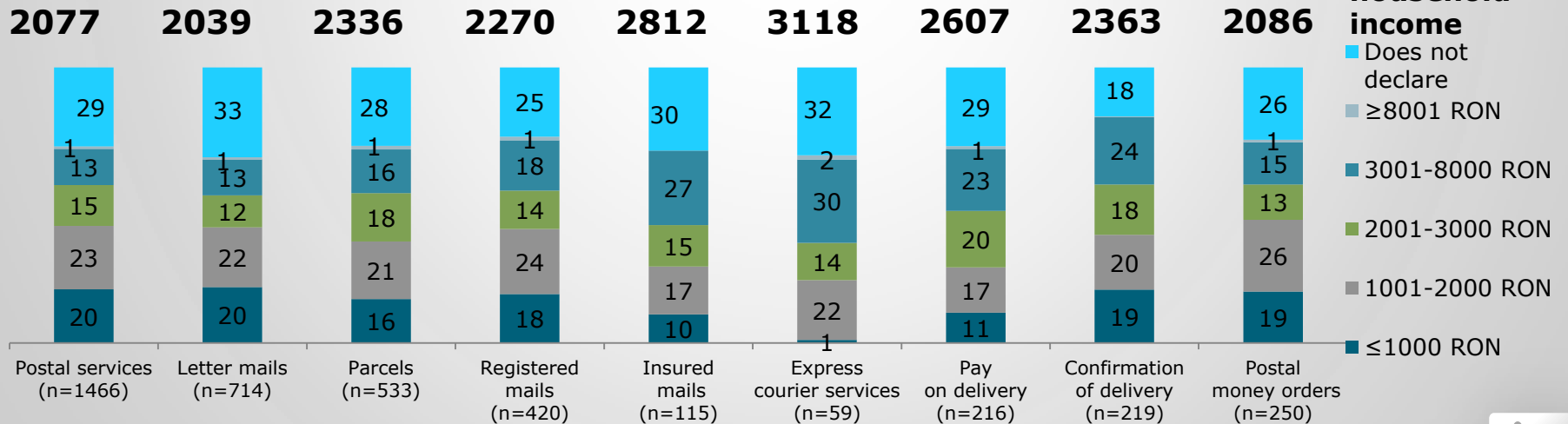
* Only for services used by at least 30 respondents

Users Demographics

Occupation



Household Income



* Only for services used by at least 30 respondents



Appendix

- > The questionnaire:



Questionnaire
Chestionar Utilizare Serviciu Postal

- > The detailed structure of the sample (absolute values, unweighted):

| Gender | Number of Interviews |
|--------------|----------------------|
| Men | 605 |
| Women | 861 |
| Total | 1466 |

| Location Size | Number of Interviews |
|------------------------------|----------------------|
| Bucharest | 155 |
| Large cities (>200K pop) | 154 |
| Medium cities (50K-200K pop) | 299 |
| Small cities (<50K pop) | 241 |
| Rural | 617 |
| Total | 1466 |

| Age Groups | Number of Interviews |
|--------------|----------------------|
| 16-24 years | 203 |
| 25-34 years | 307 |
| 35-44 years | 283 |
| 45-54 years | 258 |
| 55-64 years | 237 |
| 65+ | 178 |
| Total | 1466 |

| Residence | Number of Interviews |
|--------------|----------------------|
| Urban | 849 |
| Rural | 617 |
| Total | 1466 |



Appendix

> The detailed structure of the sample (absolute values, unweighted):

| Region | Number of Interviews |
|--|----------------------|
| North - East | 248 |
| South - East | 189 |
| South | 202 |
| South - West | 153 |
| West | 190 |
| North - West | 183 |
| Central Region | 126 |
| Bucharest-Ilfov | 175 |
| Total | 1466 |
| Occupation | Number of Interviews |
| Manager/ Employee with high education | 404 |
| Worker/ Employee with medium education | 376 |
| Farmer | 20 |
| Retired person | 334 |
| Student | 115 |
| Does not work | 215 |
| Does not answer | 2 |
| Total | 1466 |

| Educational attainment | Number of Interviews |
|------------------------|----------------------|
| High-school | 587 |
| Post high-school | 116 |
| Higher education | 393 |
| Post-university | 79 |
| Total | 1466 |

| Household Income (RON) | Number of Interviews |
|------------------------|----------------------|
| 1000 or less | 278 |
| 1001-2000 | 335 |
| 2001-3000 | 214 |
| 3001-4000 | 94 |
| 4001-6000 | 85 |
| 6001-8000 | 19 |
| 8001 + | 12 |
| Does not declare | 429 |
| Total | 1466 |