

Spring Infographics EU countries



Country info Population 17.1 M GDP per capita €37610 GDP development 2013-2017 + 2.9% Revenue B2C E-commerce €22.5B Revenue E-commerce per capita €1317 Use of internet 66.5% VAT percentage 21% for most products Import taxes threshold €22



Delivery preferences





Top 3 return preferences

- 1. 34% drop off at a parcel shop
- 2. 27% pick up at home
- 3. 23% drop off at a post office



Shipping costs

65% of all deliveries are delivered free of charge, **17%** costs less than € 5,-



Top 3 important elements

- 1. 56% clear information about delivery charges before purchase
- 2. 49% simple and reliable returns
- 3. 47% total cost overview

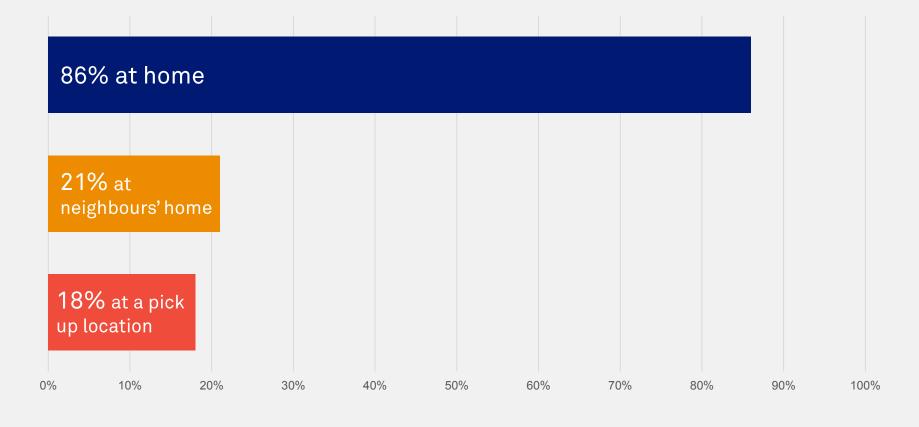




<u>Top 3 encountered delivery issues</u>

- 1. 16% delivery time too long
- 2. 4% tracking issue
- 3. 4% delivery time inconvenient
- 71% no issues

Top 3 delivery locations



Results may exceed 100% since multiple answers were possible.

Experience from a local expert

"The PostNL app is of great value to me because it shows me exactly when my parcel will be delivered and at what time it is expected to arrive. It also allows me to arrange a redelivery or a change of address if needed. My neighbours are also happy to receive my package on my behalf so I can pick it up after work."

Micaela Romani



Country info Population 11.4 M GDP per capita €34668 GDP development 2013-2017 + 2.7% Revenue B2C E-commerce € 10.5 B Revenue E-commerce per capita €927 Use of internet ——— 53.5% VAT percentage 21% for most products Import taxes threshold €22



Delivery preferences <u>Signature</u> Top 3 return preferences 1. 44% drop off at a post office 27% prefers to sign 2. 23% drop off at a parcel shop for all deliveries 3. 14% pick up at home Top 3 important elements **Shipping costs** 1. 66% clear information about 70% of all deliveries delivery charges before purchase \$ 2. 55% free returns are delivered free of 3. 54% free delivery on purchases charge, 16% costs less over a particular value than € **5,-**Top 3 encountered delivery issues **Fast** delivery 1. 16% delivery time too long 2. 4% delivery time inconvenient 3. 3% tracking issue • 72% no issues Top 3 delivery locations 79% at home 20% at a post office 17% at a pick up location 90% 20% 70%

Results may exceed 100% since multiple answers were possible.

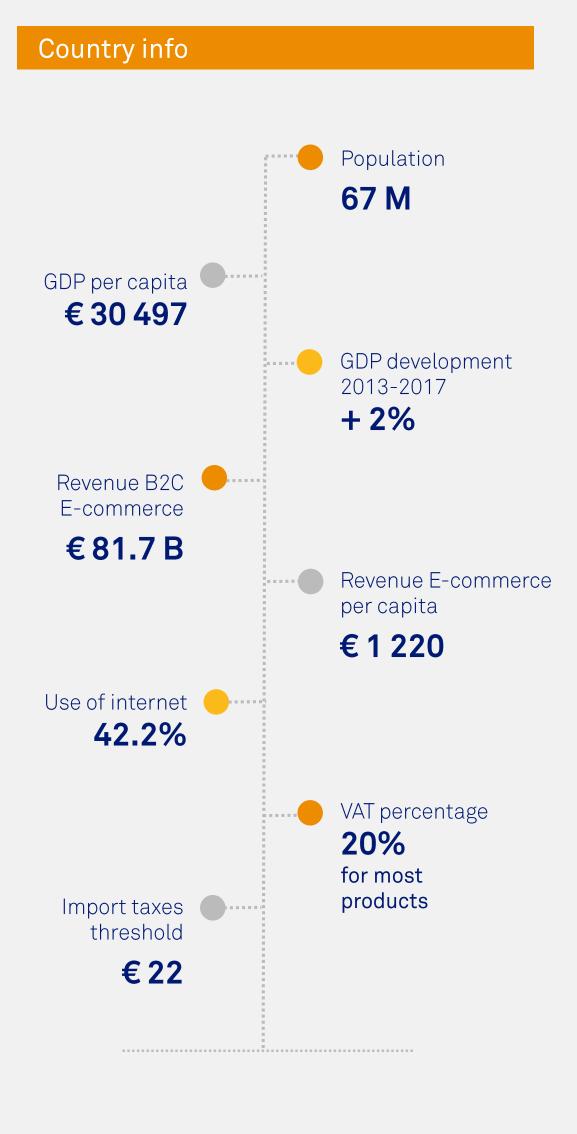


Experience from a local expert

"As in many other E-commerce countries, home delivery is most popular but delivery at a pick up location becomes more common nowadays as well. A good retail network is therefore of great importance when choosing a logistical partner."

Freya Van Looy







Delivery preferences <u>Signature</u> Top 3 return preferences 1. 32% drop off at a post office 23% prefers to sign 2. 32% drop off at a parcel shop for all deliveries 3. 9% pick up at home Top 3 important elements **Shipping costs** 1. 65% clear information about 63% of all deliveries **\$** delivery charges before purchase are delivered free of 2. 56% possibility to select delivery charge,19% costs less location than **€ 5,-**3. 55% free returns Top 3 encountered delivery issues Fast delivery 1. 14% delivery time too long 2. 4% tracking issue 3. 3% delivery time inconvenient 71% no issues Top 3 delivery locations 70% at home 46% at a parcel shop 17% at a post office 100%

Results may exceed 100% since multiple answers were possible.

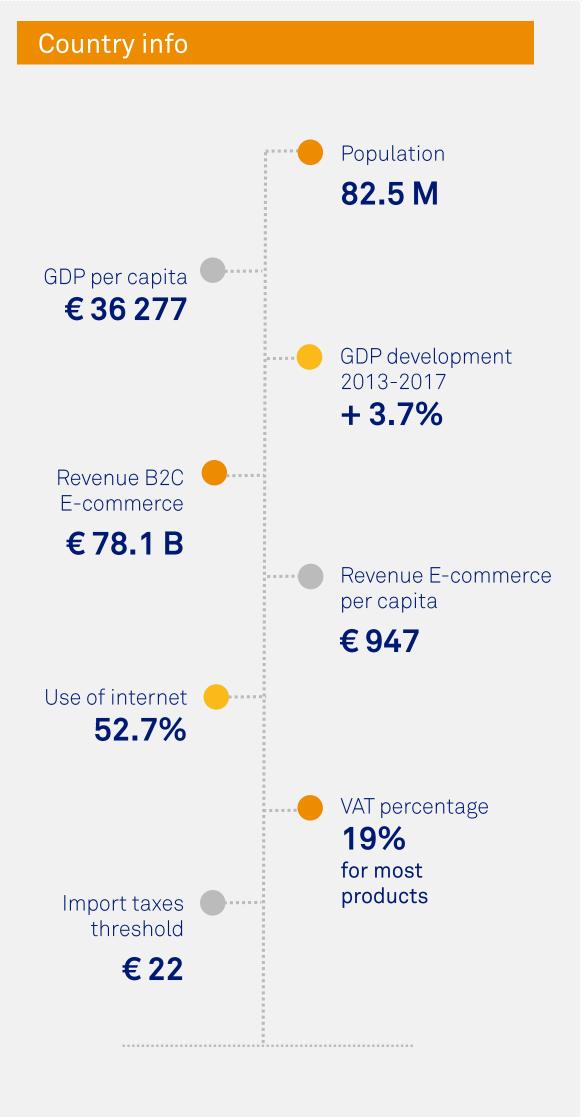


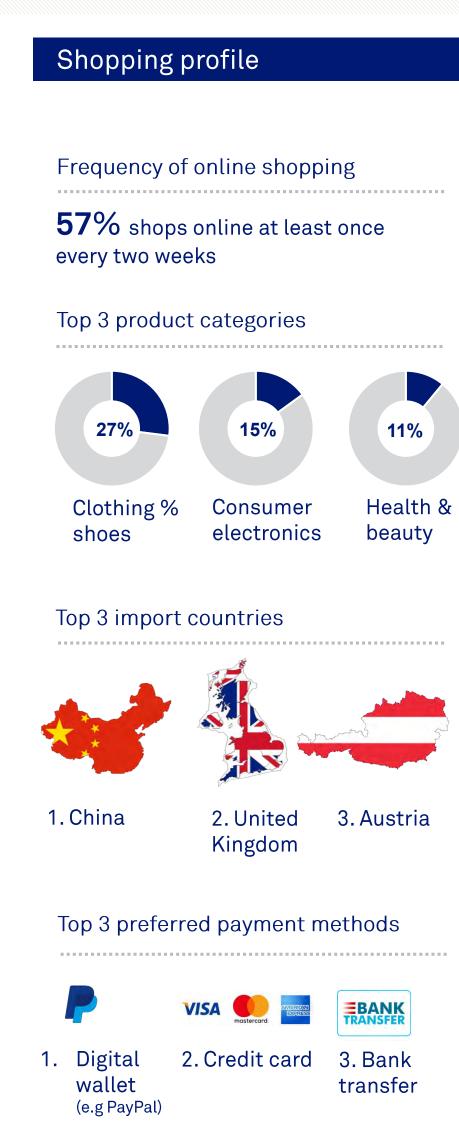
Experience from a local expert

"I particularly appreciate to find my package in my mailbox when I am not at home so that I don't need to go to the post office to get it."

Anne Prevosti







Delivery preferences <u>Signature</u> Top 3 return preferences 1. 36% drop off at a post office 39% prefers to sign 2. 23% drop off at a parcel shop for all deliveries 3. 22% pick up at home **Shipping costs** Top 3 important elements 1. 66% clear information about 63% of all deliveries **\$** delivery charges before purchase are delivered free of 2. 55% free returns charge,16% costs less 3. 55% simple and reliable returns than € **5,**process Top 3 encountered delivery issues **Fast** delivery 1. 25% delivery time too long 2. 9% tracking issue 3. 8% delivery time inconvenient 53% no issues Top 3 delivery locations 77% at home 25% at neighbours' home 18% at a safe place at home 10% 100%

Results may exceed 100% since multiple answers were possible.

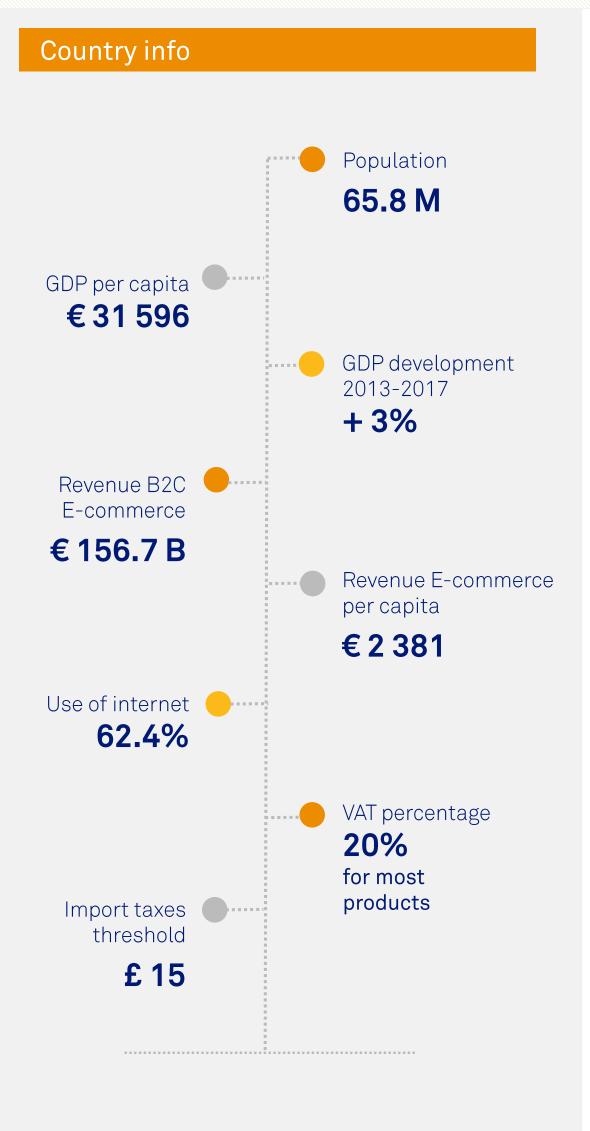


Experience from a local expert

"Delivery regulations in Germany are very strict. The address must be completely correct including the addressee's name. This name should always correspond to the name on the door sign."

Karsten Tannhaeuser

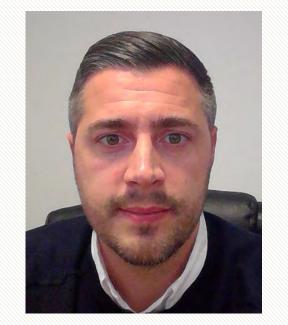






Delivery preferences **Signature** Top 3 delivery locations 29% prefers to sign 1. 77% at home 2. 28% at neighbours' home for all deliveries 3. 28% at safe place at home Top 3 return preferences Shipping costs 1. 38% drop off at postal office 67% of all deliveries **\$** 2. 30% pick up at home are delivered free of 3. 10% drop off at parcel shop charge, 13% costs less than € **5,-**Top 3 encountered delivery issues **Fast** delivery 1. 12% delivery time too long 2. 6% tracking issue 3. 5% delivery time inconvenient 69% no issues Top 3 important elements 64% clear information about delivery charges before purchase 52% simple and reliable returns process 51% free returns 30% 100%

Results may exceed 100% since multiple answers were possible.

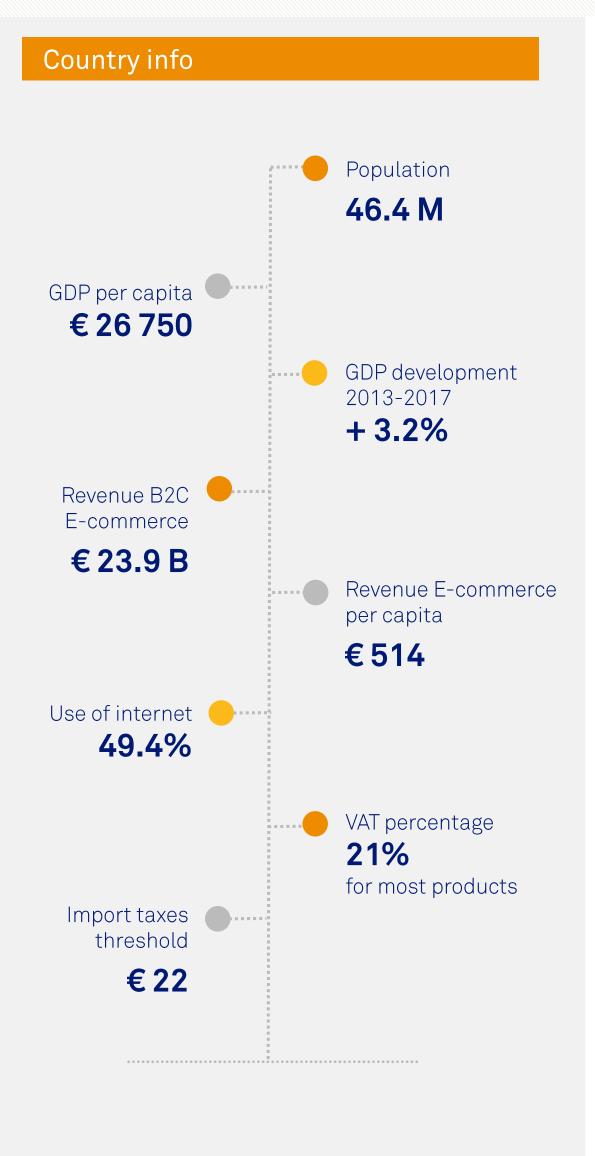


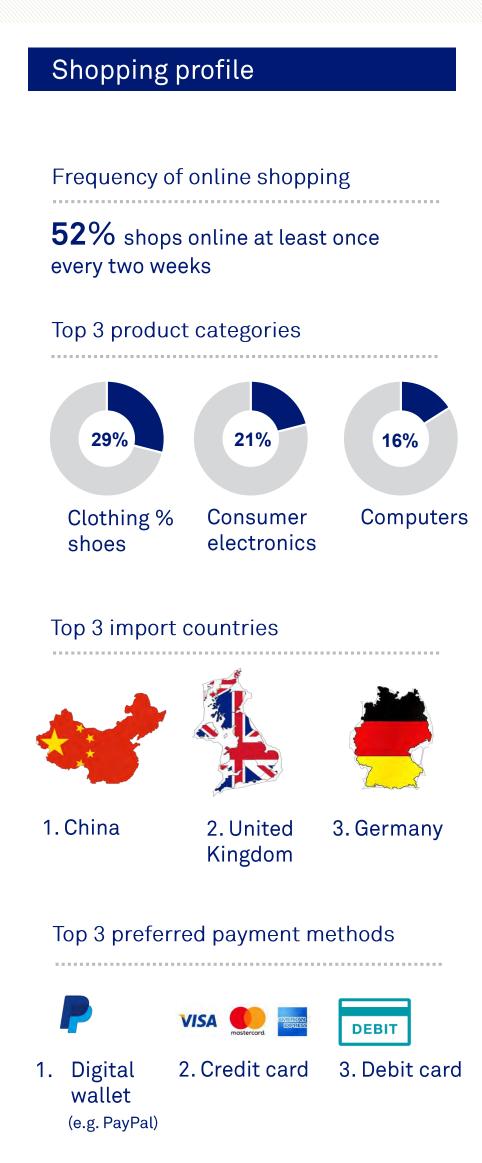
Experience from a local expert

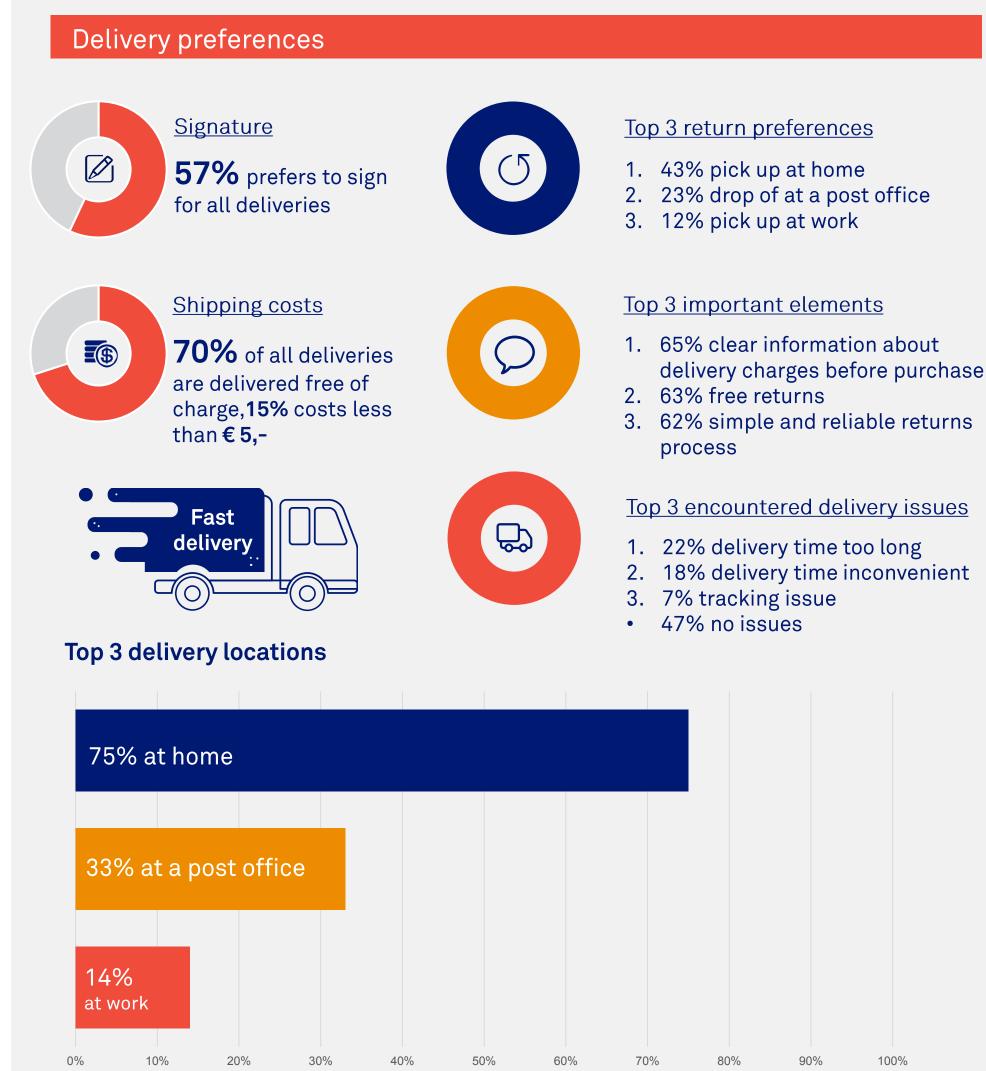
"UK consumers today expect to be in control of their delivery at every step and are looking for services that offer the flexibility to fit in with their busy lifestyles. Pre delivery notifications via E-mail & SMS advising a one or two hour delivery window is standard, as well as inflight divert options for alternative delivery to a neighbour or parcel shop location."



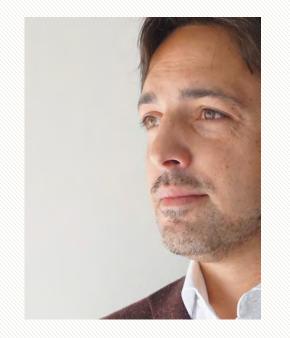








Results may exceed 100% since multiple answers were possible.



Experience from a local expert

"In Spain e-commerce deliveries are always expected to be delivered at home, and a proof of delivery is most appreciated. In fact, most of the local couriers have this as their standard option. Mailbox deliveries are not preferred for security reasons. Also we are not very familiar with pick-up points: we believe that if we required a home delivery, we should really get the product delivered at home!"

Emiliano Vidal







Delivery preferences <u>Signature</u> Top 3 delivery locations 38% prefers to sign 1. 66% at home 2. 18% at a safe place at home for all deliveries 3. 16% at an alternative address **Shipping costs** Top 3 important elements 1. 63% free returns 67% of all deliveries **\$** 2. 62% free delivery on purchases are delivered free of over a particular value charge,15% costs less 3. 61% clear information about than € **5,**delivery charges before purchase Top 3 encountered delivery issues Fast delivery 1. 19% delivery time too long 2. 8% tracking issue 3. 7% delivery time inconvenient 63% no issues Top 3 return preferences 34% pick up at home 21% drop off at a post office drop off at a parcel shop 100%

Results may exceed 100% since multiple answers were possible.



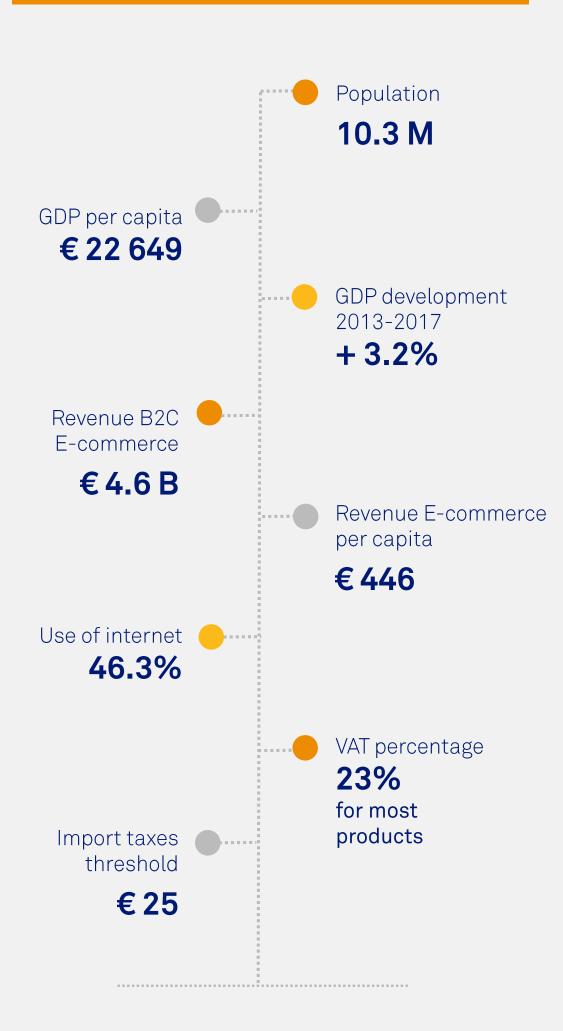
Experience from a local expert

"Generally, I like receiving my parcel at home or at my office premises. Neighbour or drop-off delivery are not very common and developed in Italy. What is important for me is to have my shipments tracked and, if possible, receive proactive notifications by SMS or E-mail."

Paola Miatello



Country info

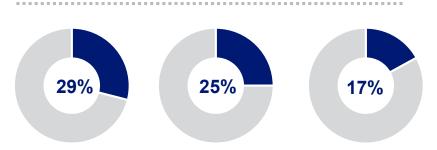


Shopping profile

Frequency of online shopping

29% shops online at least once every two weeks

Top 3 product categories



Clothing &

shoes

Consumer electronics

Health & beauty

Top 3 import countries



1. China

2. South Korea

3. United Kingdom

Top 3 preferred payment methods



ISA mastercare

2. Credit card





1. Digital wallet (e.g. PayPal)

3. Debit card

Delivery preferences



<u>Signature</u>

43% prefers to sign for all deliveries



Top 3 return preferences

- 1. 38% pick up at home
- 2. 25% drop off at a post office
- 3. 12% pick up at work



Shipping costs

65% of all deliveries are delivered free of charge, **16%** costs less than **€ 5,-**



Top 3 important elements

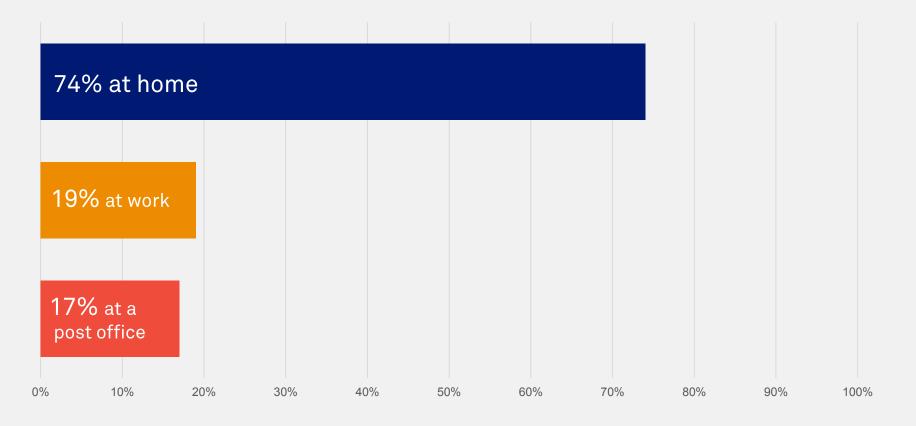
- 1. 61% clear information about delivery charges before purchase
- 2. 56% free delivery on purchases over a particular value
- 3. 55% free returns



Top 3 encountered delivery issues

- 1. 26% delivery time too long
- 2. 12% delivery time inconvenient
- 3. 8% customs issue
- 50% no issues

Top 3 delivery locations



Results may exceed 100% since multiple answers were possible.





Spring Infographics NON-EU countries



Country info Population 1.4 B (July 2018 est.) GDP per capita € 15 036 (2017 est.) Revenue B2C E-commerce €561 B Use of internet —— 53.2% (2016 est.) VAT percentage 6%, 11%, 17% for most products Import taxes —— threshold ¥ 500



Delivery preferences <u>Signature</u> Top 3 delivery locations 1. 61% at home **52%** prefers to sign 2. 32% at a parcel locker for all deliveries 3. 25% at a safe place at home **Shipping costs** Top 3 return preferences 1. 50% pick up at home 78% of all deliveries **\$** 2. 13% pick up at workplace are delivered free of 3. 13% drop off at parcel charge, 7% costs less locker station than € **5,-**Top 3 encountered delivery issues Fast 1. 31% delivery time too long delivery 2. 16% delivery costs are too high 15% issue with customs 30% no issues **Top 3 important elements** 42% full visibility on delivery process 40% free returns 38% simple and reliable returns process 100%

Results may exceed 100% since multiple answers were possible.



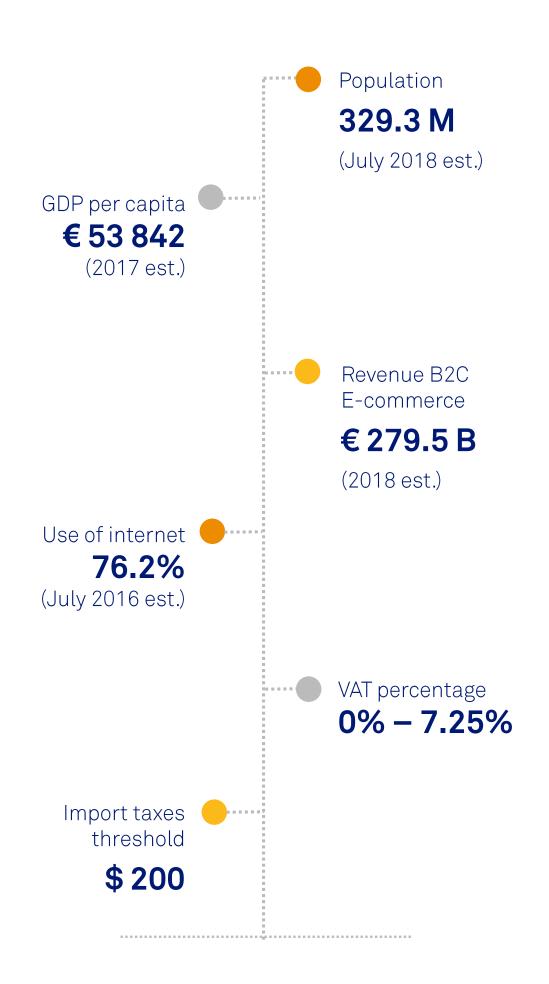
Experience from a local expert

"Did you know that Chinese consumers use 3rd party sites to track their shipments?"

Cat Hai Chiem



Country info

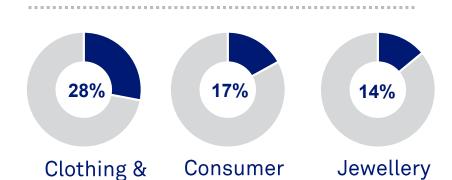


Shopping profile

64% shops online at least once every two weeks

Frequency of online shopping

Top 3 product categories

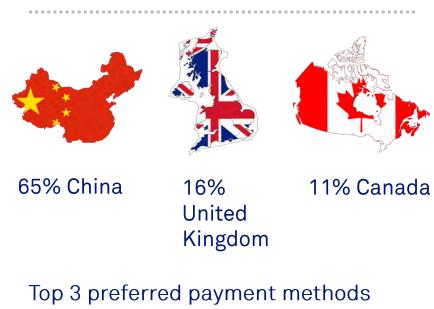


electronics

& watches

Top 3 import countries

shoes



P	VISA Mastercard.	DEBIT
District	O Out dit a sud	O. Dalait a

1. Digital 2. Credit card 3. Debit card wallet

(e.g. PayPal)

Delivery preferences





Top 3 delivery locations

- 1. 78% at home
- 2. 15% at a post office
- 3. 13% at a safe place at home



Shipping costs

65% of all deliveries are delivered free of charge, 18% costs less than € **5,-**



Top 3 return preferences

- 1. 38% pick up at home
- 2. 33% drop off at postal office
- 3. 9% drop off at a parcel shop

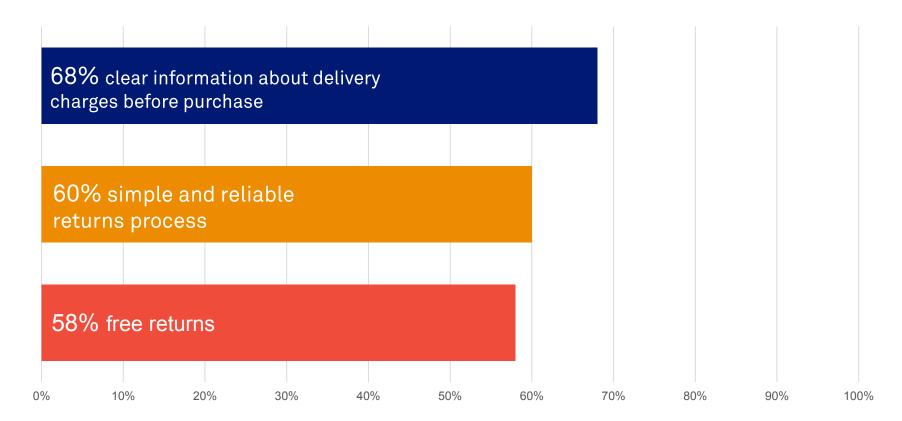




Top 3 encountered delivery issues

- 1. 20% delivery time too long
- 2. 9% tracking issue
- 9% delivery time inconvenient
- 58% no issues

Top 3 important elements



Results may exceed 100% since multiple answers were possible.



Experience from a local expert

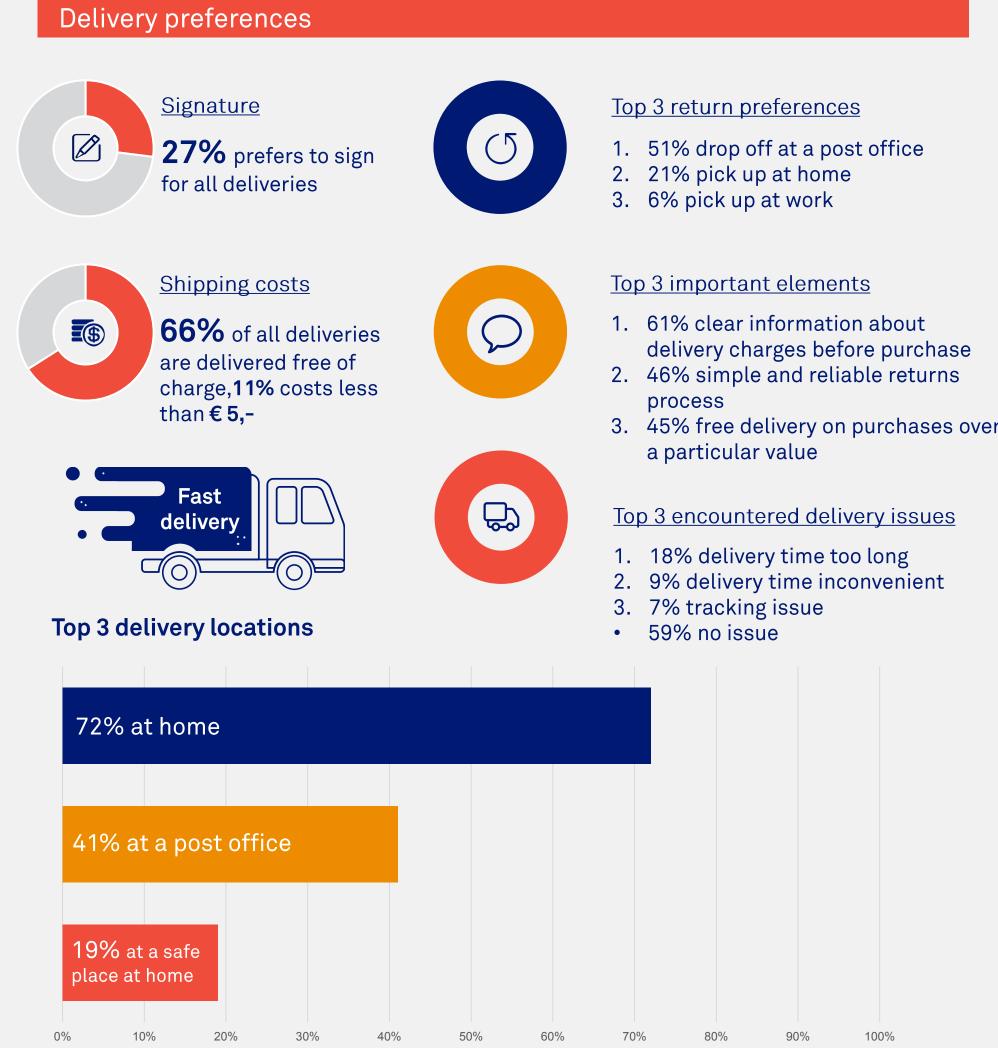
"What American receivers value a lot is the flexibility of sending parcels in all weight ranges and being able to track the item as it moves along the process."

Lou Laforet



Country info Population 23.5 M (July 2018 est.) GDP per capita € 45 392 (2017 est.) Revenue B2C E-commerce €16.7 B (2018 est.) Use of internet ——— 88.2% (July 2016 est.) VAT percentage (GST in AU) 10% Import taxes —— threshold **AUD \$ 1000**





Results may exceed 100% since multiple answers were possible.



Experience from a local expert

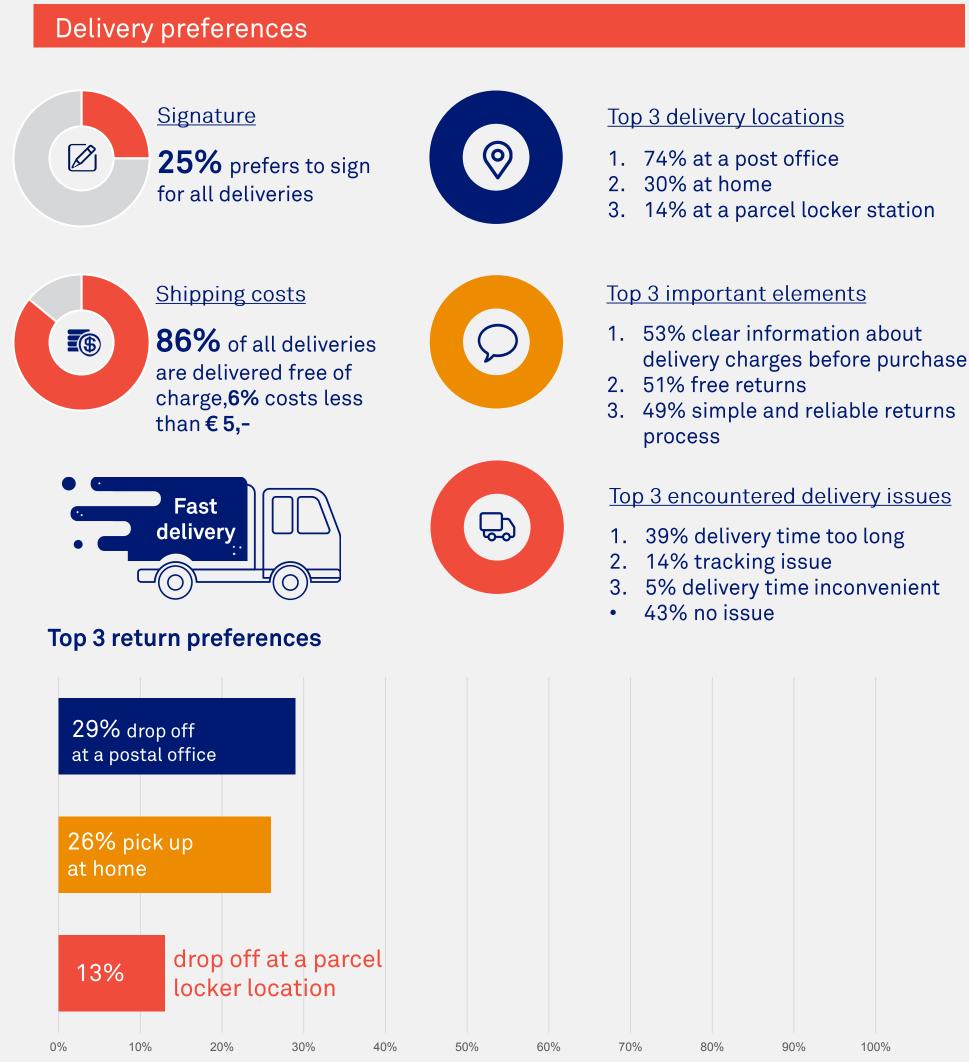
"Since delivery is almost always done during normal working hours, it is important to have flexible delivery options and receive up-to-date tracking information. It is common in Australia to change the delivery location of your package."

Christopher Reinig



Country info Population 142.1 M (July 2018 est.) GDP per capita € 25 127 (2017 est.) Use of internet 76.4% (July 2016 est.) VAT percentage 18% for most products Import taxes threshold **¤ 40 000**





Results may exceed 100% since multiple answers were possible.



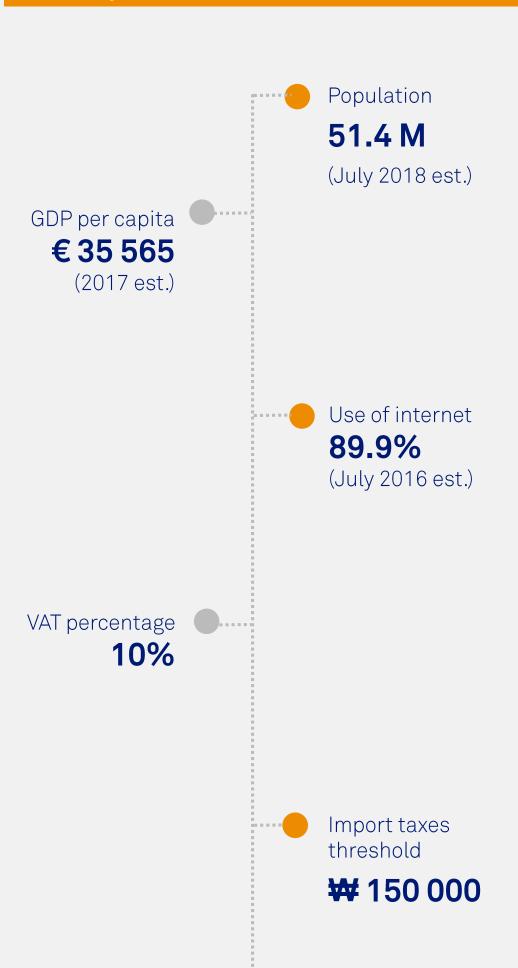
Experience from a local expert

"Russians like to order online but have very long working hours so we are usually not home to receive the parcel. The option to have parcels delivered to a retail location with long opening hours and open in weekends is therefore a must for me."

Ludmilla van de Sande



Country info



Shopping profile

Frequency of online shopping

79% shops online at least once every two weeks

Top 3 product categories



shoes

Top 3 import countries

beauty



1. Credit card 2. Digital

wallet (e.g. PayPal) 3. Debit card

DEBIT

electronics

Delivery preferences



<u>Signature</u>

25% prefers to sign for all deliveries



Top 3 delivery locations

- 1. 74% at home
- 2. 24% at work
- 3. 21% at a safe place at home



Shipping costs

60% of all deliveries are delivered free of charge,7% costs less than **€ 5,-**



Top 3 return preferences

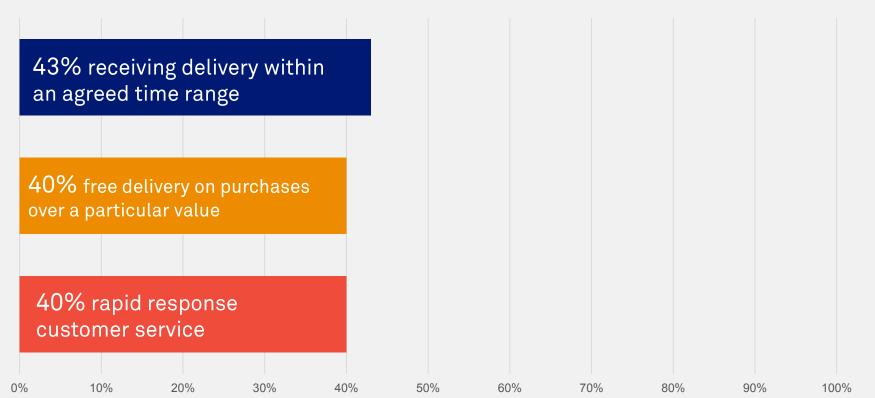
- 1. 52% pick up at home
- 2. 15% pick up at work
- 3. 14% drop off at a post office



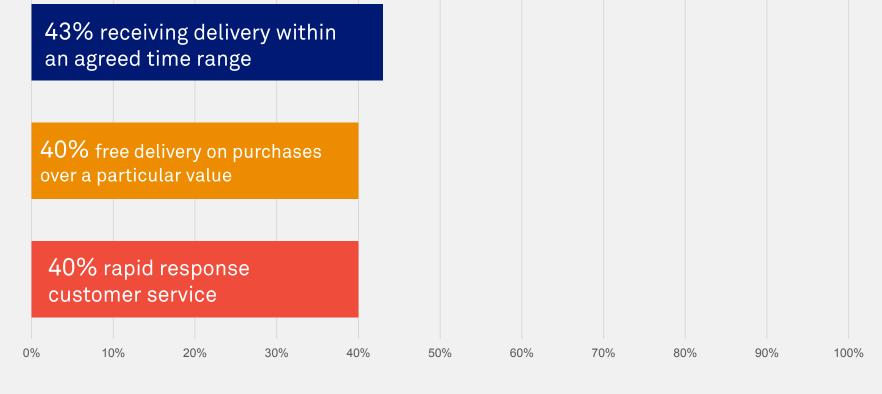
Top 3 important elements

Top 3 encountered delivery issues

- 1. 34% delivery time too long
- 2. 12% delivery time inconvenient
- 10% tracking issue
- 33% no issue



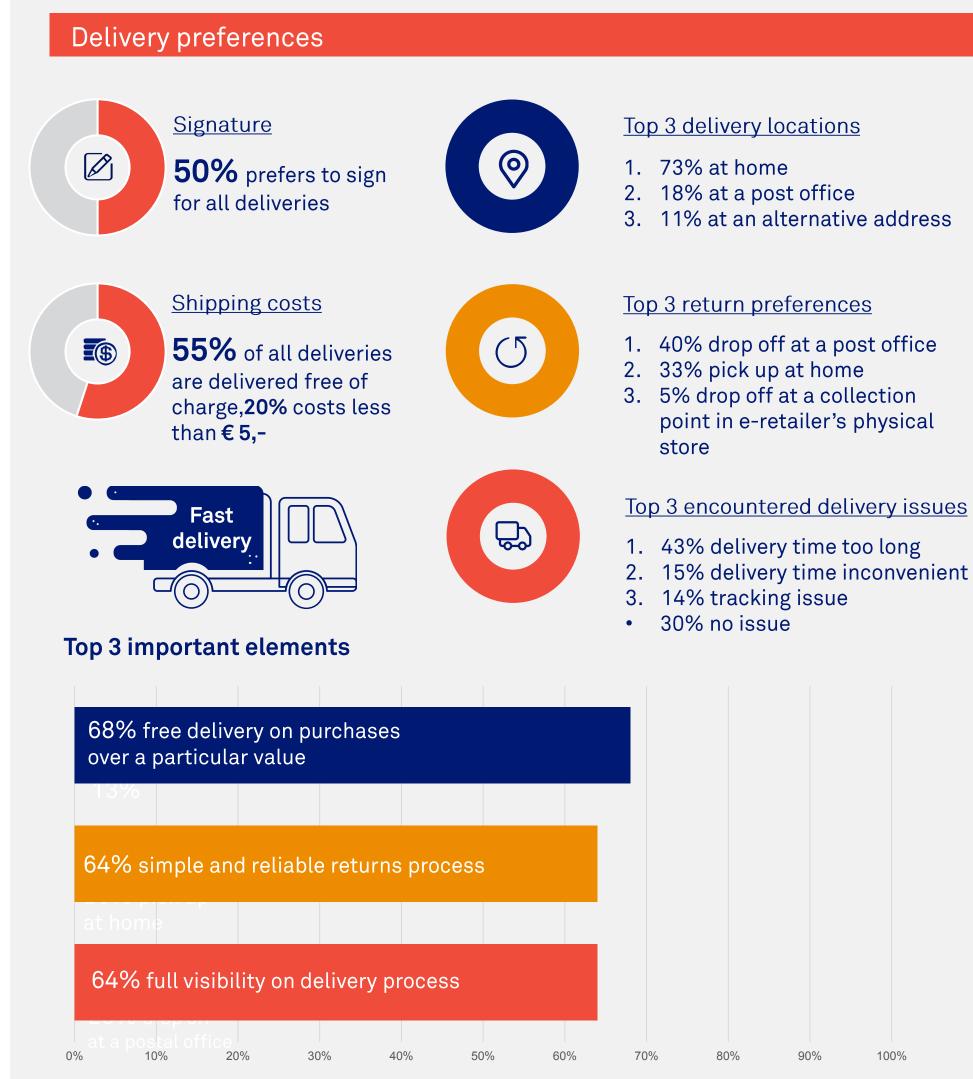
Results may exceed 100% since multiple answers were possible.





Country info Population 208.8 M (July 2018 est.) GDP per capita € 14 047 (2017 est.) Revenue B2C E-commerce €13,2 m (2018 est.) Use of internet ——— 59.7% (July 2016 est.) VAT percentage 7-18% (depending per state) Import taxes threshold \$50





Results may exceed 100% since multiple answers were possible.



Experience from a local expert

"The Brazilian postal service collects a 15 Real Postal Fee for all international mail and parcels arriving in Brazil. This mail service fee, however, should not be confused with taxes or duties and is collected for all items including non-taxable items."

Nicolaas van der Meer

