

Home

Delivery Matters

Leading Insight

Online Shopping

Delivery Matters

Understanding the
needs of online
shoppers in
Germany in 2015



Germany Edition



Royal Mail

Contents

- [03 Welcome](#)
- [04 The trends](#)
- [06 Average spend](#)
- [07 How do shoppers shop?](#)
- [08 Marketplaces are influential in Germany](#)
- [10 Delivering confidence](#)
- [11 Delivery satisfaction](#)
- [12 Cart abandonment](#)
- [13 Preferred delivery location](#)
- [14 Tracking](#)
- [15 Germany ❤ UK](#)
- [17 Expectations of delivery timeframes](#)
- [18 Why buy UK?](#)
- [19 Where do they shop?](#)
- [20 What stops them?](#)

Online shopping



Delivery matters in Germany



Welcome to our first Germany Delivery Matters report

We've been producing research like this in the UK for the past seven years, helping retailers like you to understand consumers' habits and preferences when they shop online. We're now widening our scope, with five new international reports focusing on China, Australia, the USA, France and Germany. You can download copies of all our reports here from

royalmail.com/deliverymatters

So does delivery matter in Germany?

No doubt about it. With eight out of ten online shoppers using marketplace through platforms such as Amazon and eBay, as well as one in five online shoppers having recently purchased products from UK websites, the importance of efficient delivery in Germany is clear. Plus many marketplaces now offer free translation services which makes it really easy to access Germany.

So why are shoppers in Germany choosing British retailers? To find unique products not available locally and to bag a good deal. Many are choosing home delivery and tracking services too, making Royal Mail the perfect delivery partner. Exporting to Germany is really attractive right now as online shopping market is growing. Plus its really easy as it is within the EU offering payment in Euros and offering quick delivery with 3 - 5 days with Royal Mail.

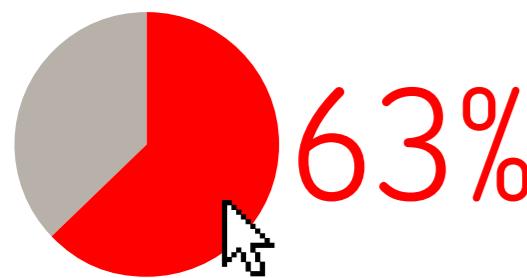
We're here to make it easier for you to get started as an exporter. We believe 'international' is just another postcode and can help businesses like yours offer an excellent delivery service, building trust with your customers while keeping costs under control. This research is a great place to start. We hope it helps you understand the needs of German online shoppers and gives you more confidence in accessing this important, and growing market.

Nick Landon

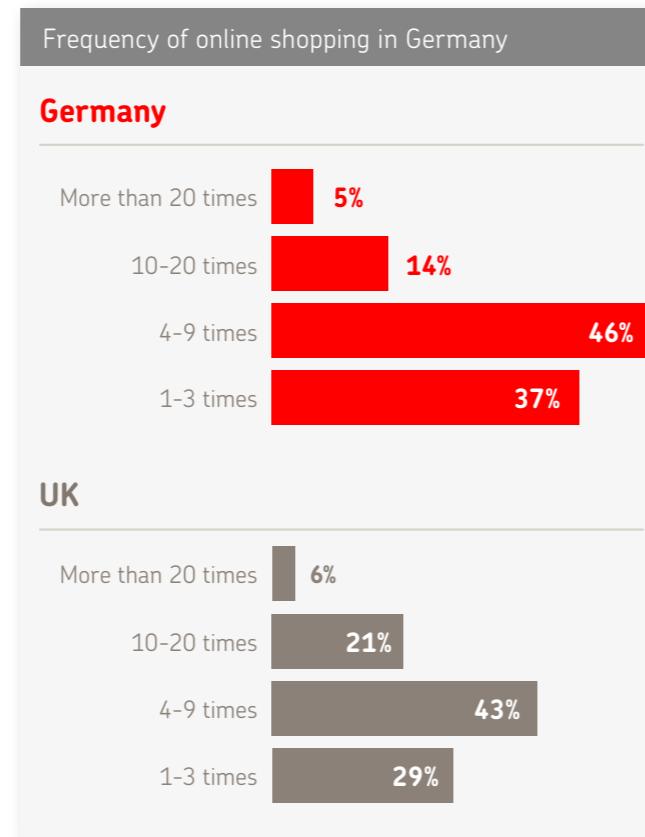
Nick Landon Managing Director of Royal Mail Parcels

The trends

Shopping online is growing in Germany. 63% of online shoppers in Germany say they purchase products online more than they used to.



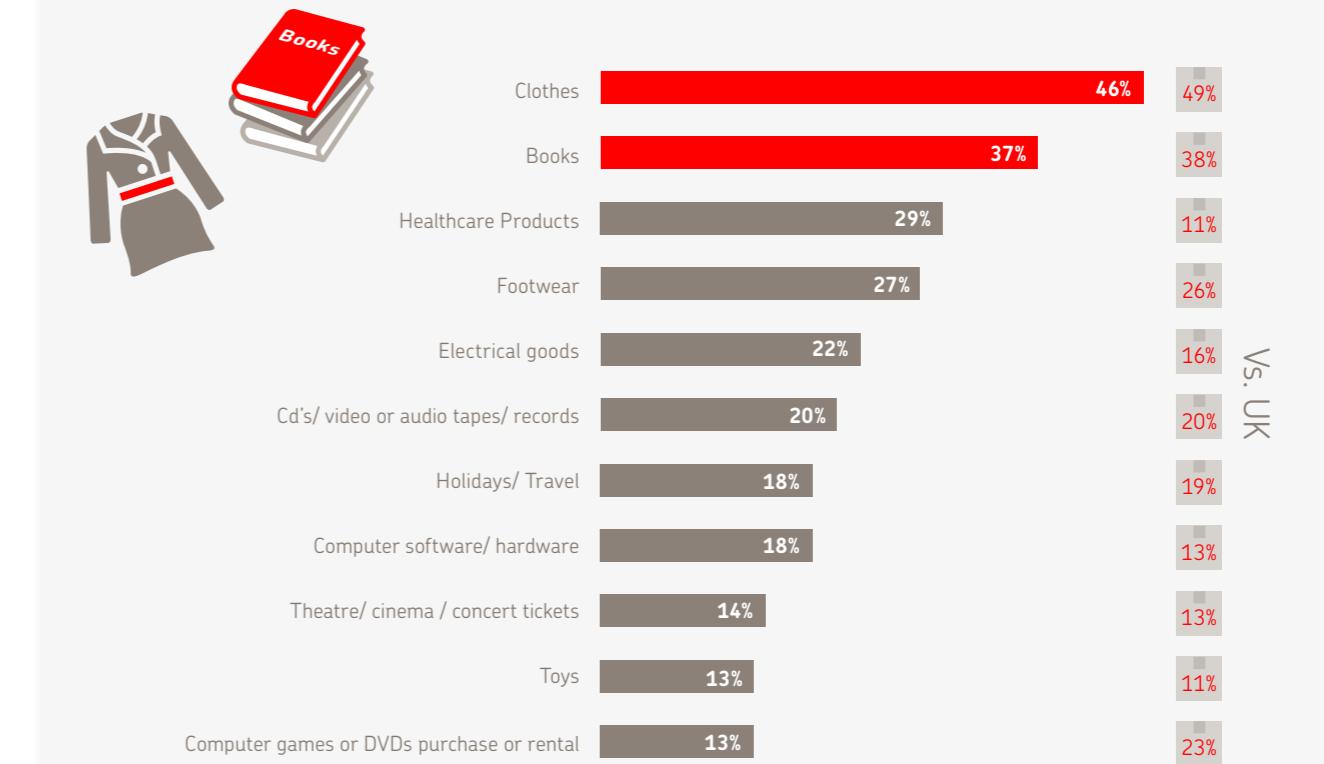
However, online shoppers in Germany tend to take to the internet less often than online shoppers in the UK. In the last three months, 19% have shopped online more than 10 times, compared to 27% in the UK.



What is bought online?



From ASOS to eBay, Germany matches the UK with clothing, pitching itself top for online purchases. German online shoppers are more likely to use the internet for health care products - 29% in Germany compared to 11% in the UK.



Average Spend



Overall, the average online spend across Germany's online shoppers is lower than in the UK. Over three months the average spend in Germany was £223, compared to £287 in the UK. This illustrates that Germany offers a mature economy but with a growing opportunity for online retailers.

Germany

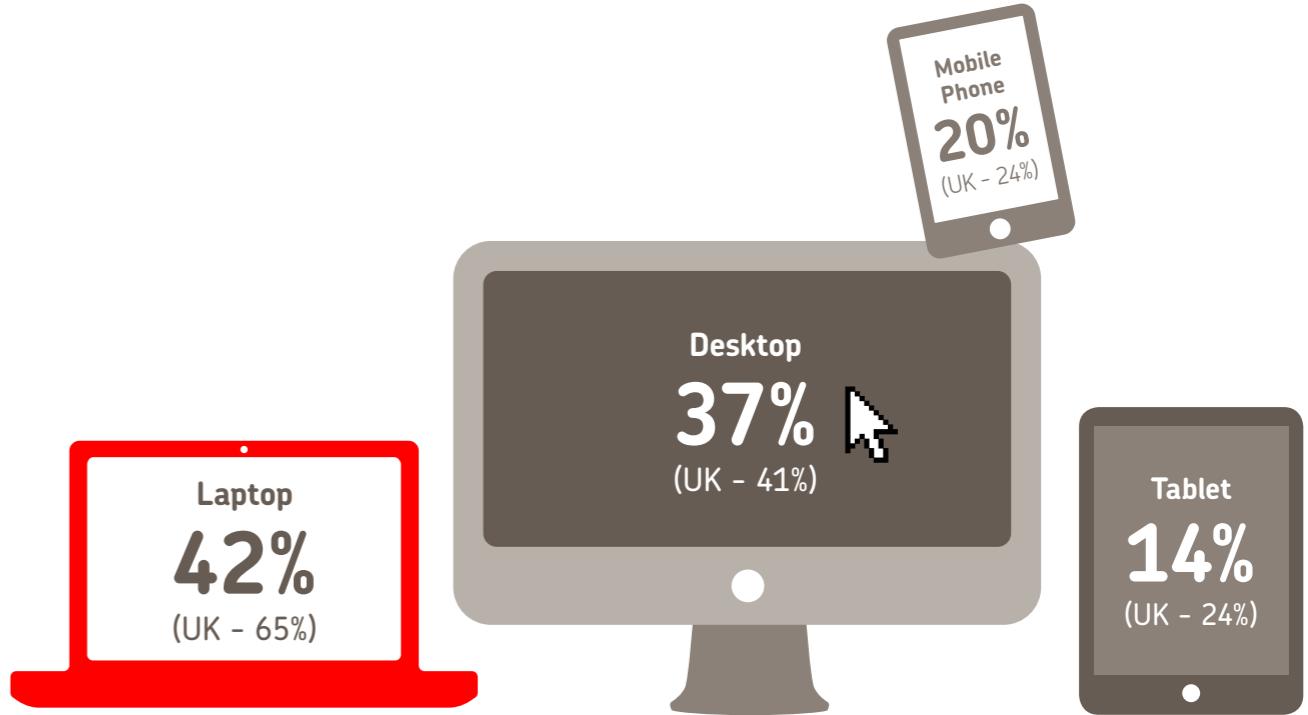


UK

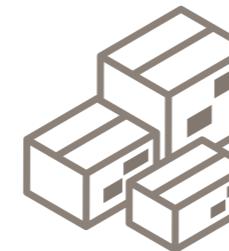


How do shoppers browse in Germany, and with which devices?

The use of mobile devices for online shopping is weaker in comparison to the UK, with more using a laptop or desktop.



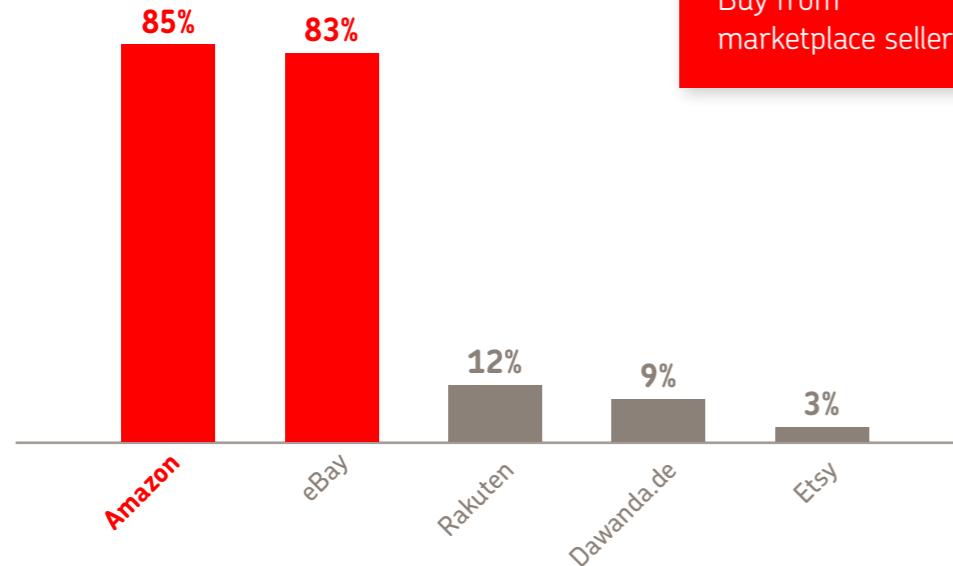
Marketplaces are influential in Germany



Online marketplaces are big in Germany.
Heavily influenced by seller ratings, eight out of ten shoppers are now using marketplaces.

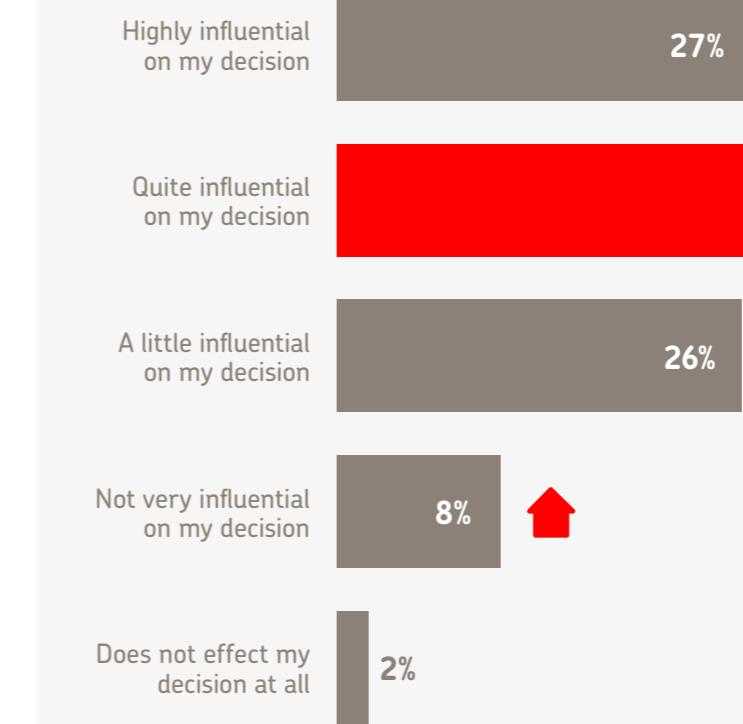
eBay and Amazon are the most popular destinations for shoppers using marketplaces.

Marketplace Used



Online marketplaces

Influence of ratings on decision to purchase



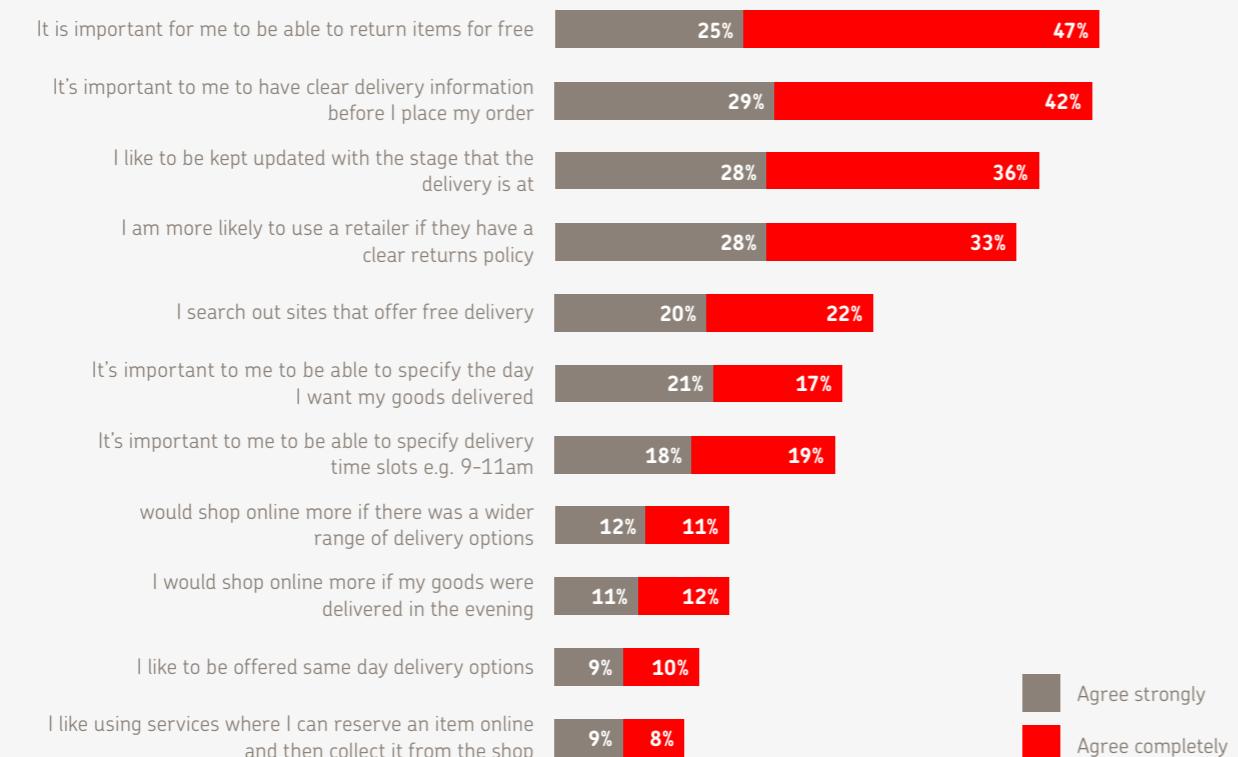
Significantly lower/
higher than the UK

64%
(UK - 69%)

Delivering confidence



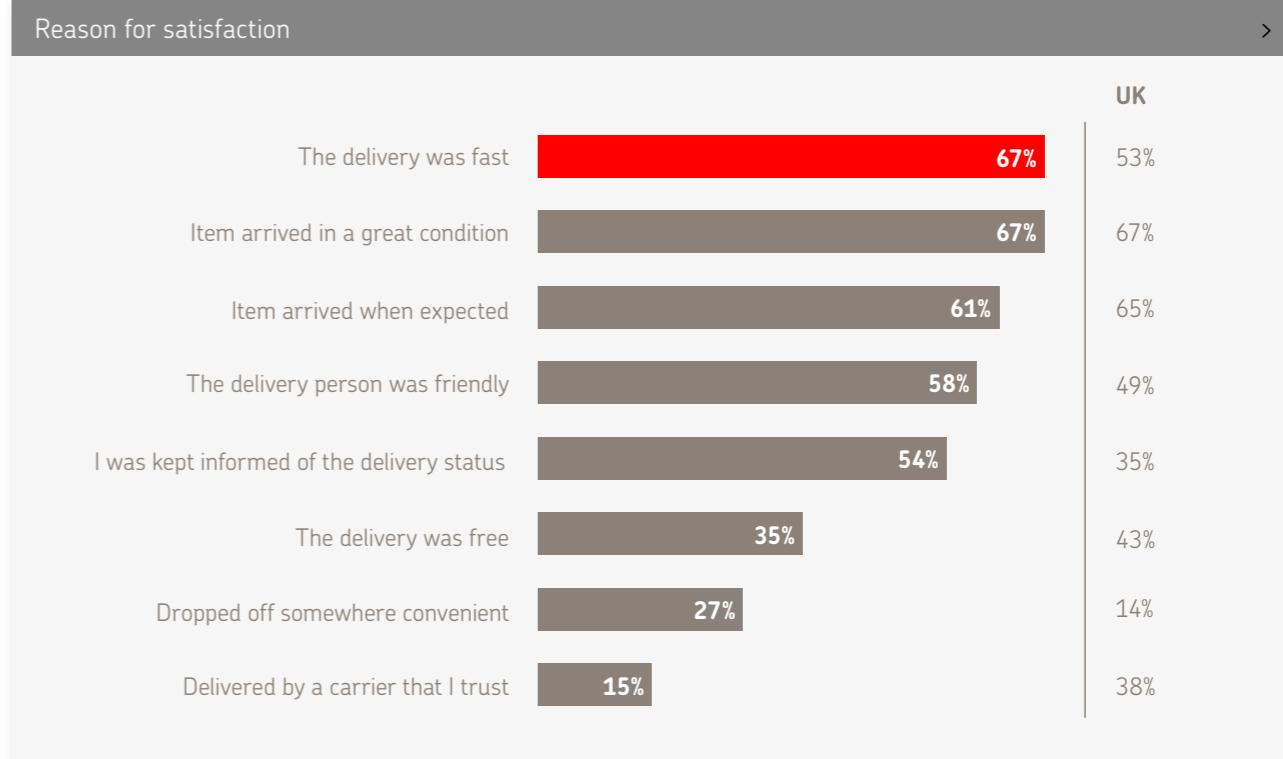
Attitudes are generally in line with the UK, with free returns and having clear delivery information the most important.



Delivery satisfaction



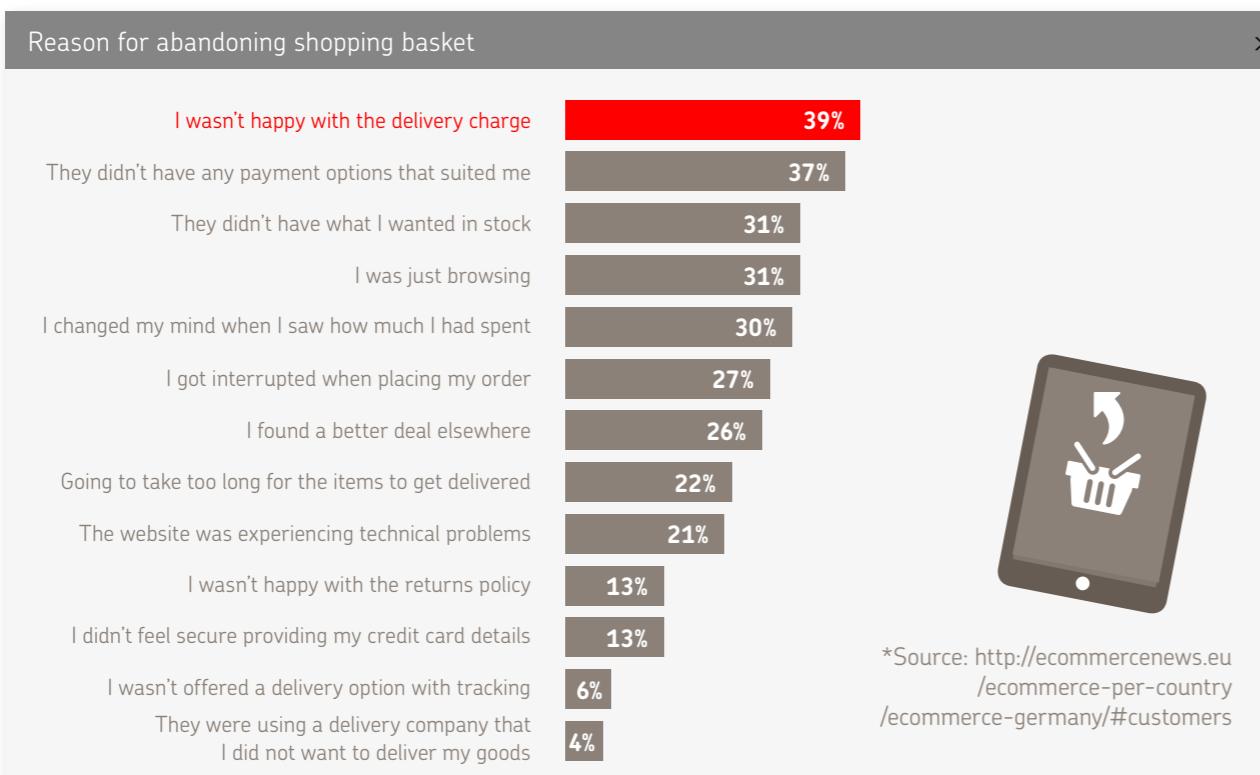
When it comes to customer satisfaction, the German market agrees with UK shoppers. Free returns and receiving goods on time and in great condition are high up on the agenda. Speed and promptness in delivery are also key factors in creating happy customers.



Cart abandonment

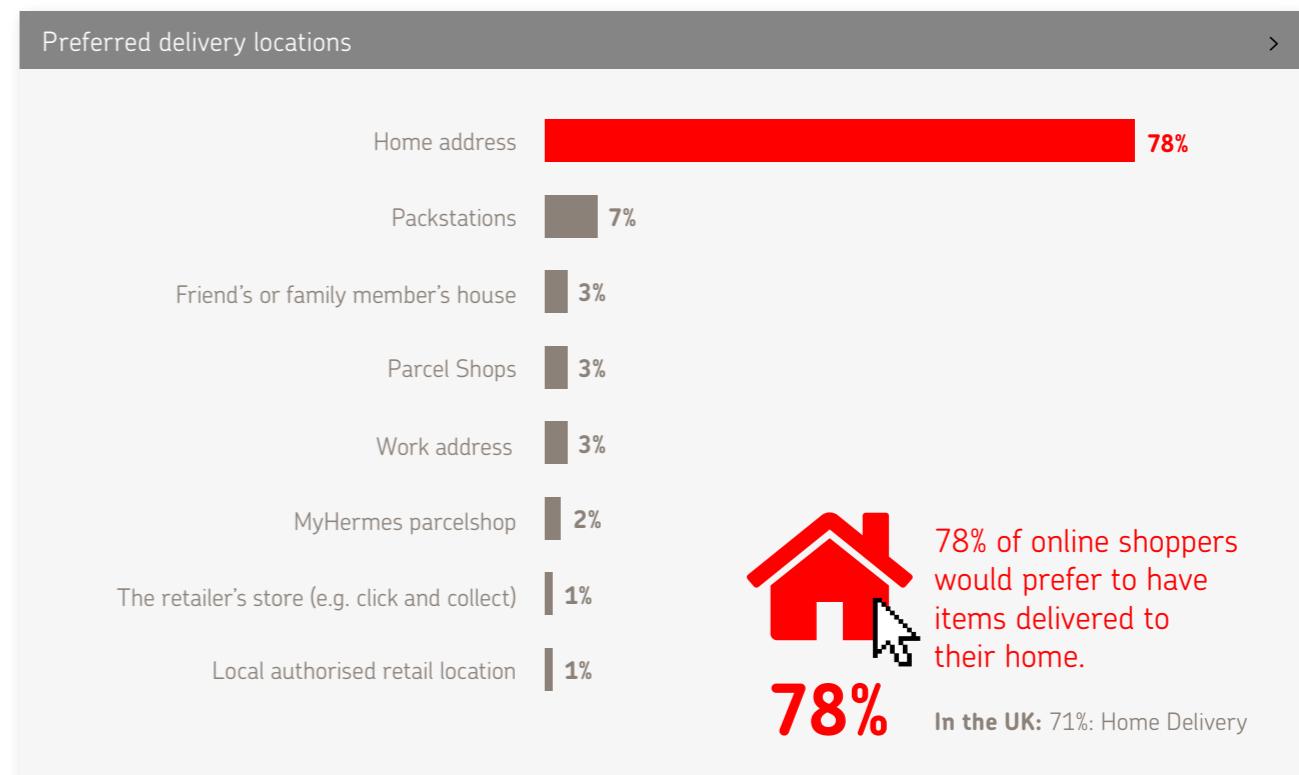


Abandoning online shopping carts is a similar problem in Germany as it is in the UK, with 19% of online shoppers frequently abandoning their basket, and 21% in the UK. Why is this happening in Germany? Our research shows that inadequate payment options is one of the main reasons for cart abandonment and other reports suggest a preference for using invoicing for online purchases*.



Preferred delivery location

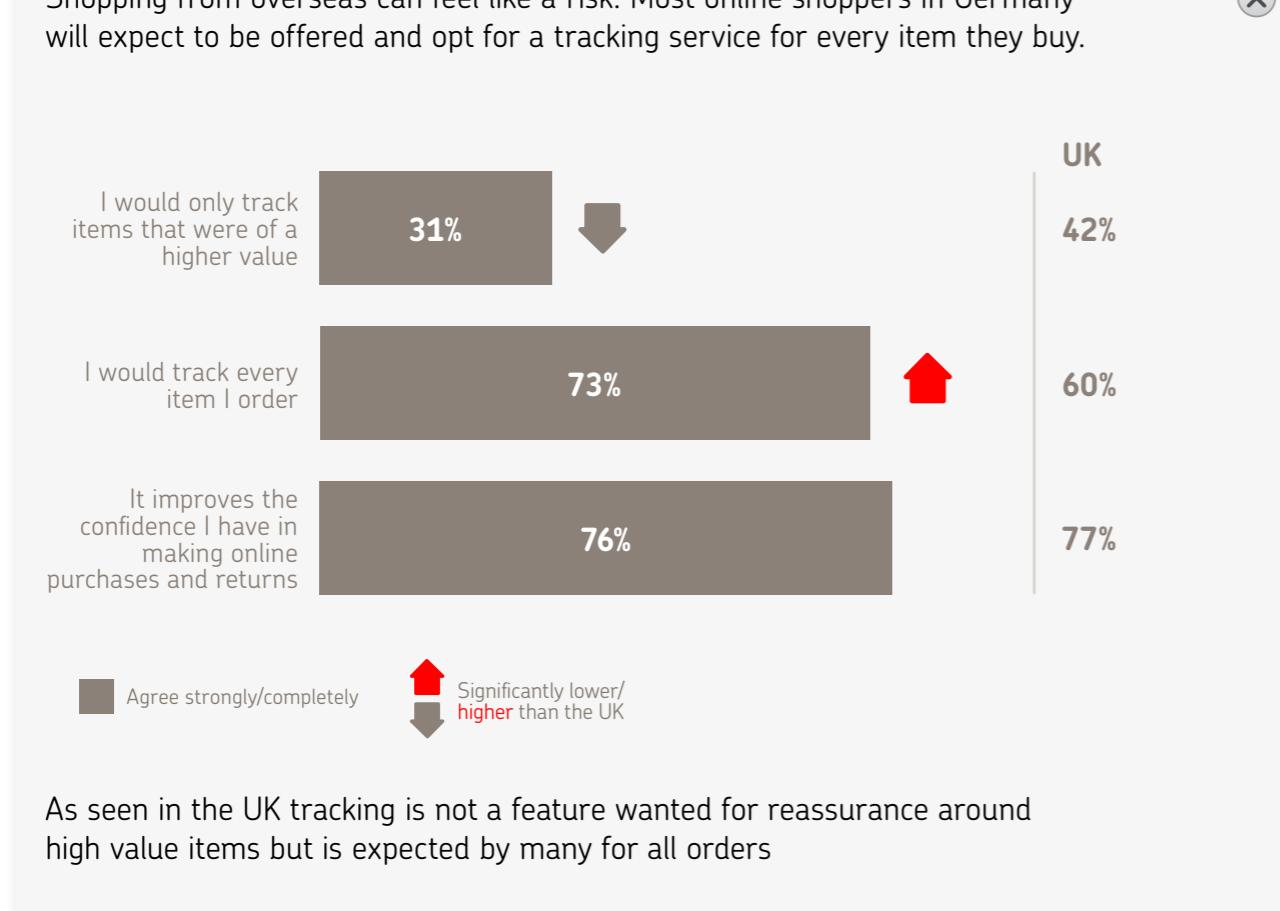
Just like online shoppers in the UK, the majority of German online shoppers prefer to have their items delivered at home. Other than home delivery, there are very few alternative delivery locations preferred in Germany.



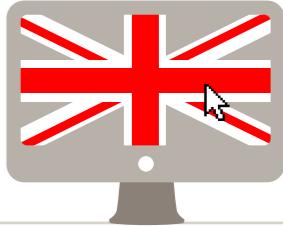
Tracking



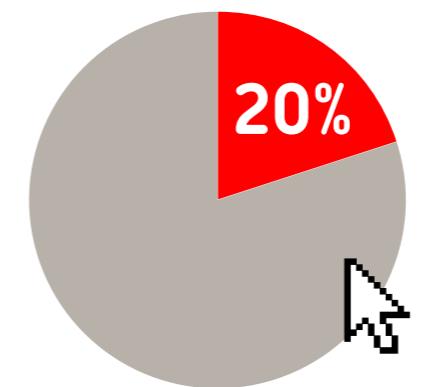
Shopping from overseas can feel like a risk. Most online shoppers in Germany will expect to be offered and opt for a tracking service for every item they buy.



Germany ❤ UK



One fifth of online shoppers in Germany have purchased items from a UK website in the last 3 months.



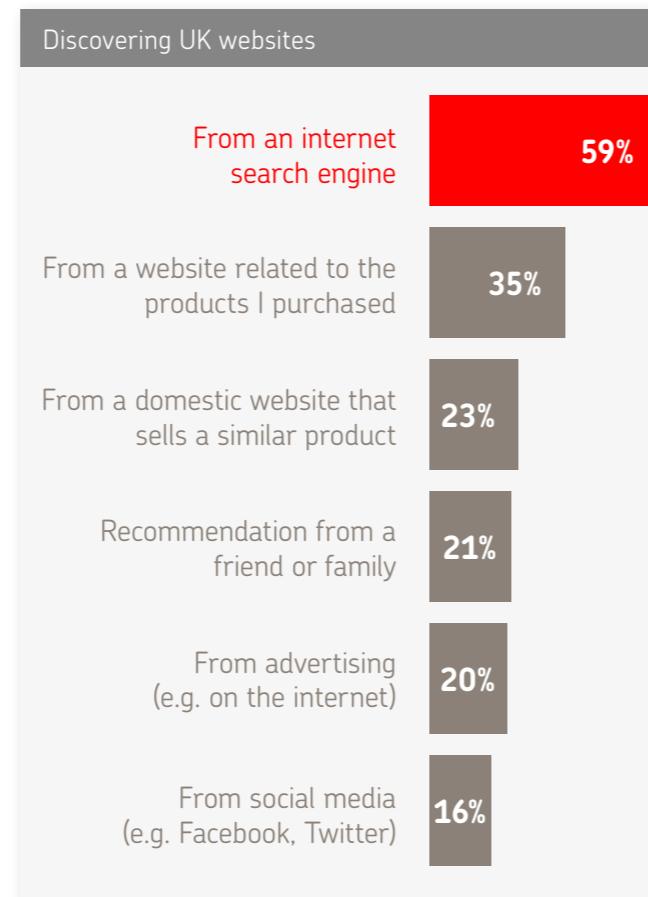
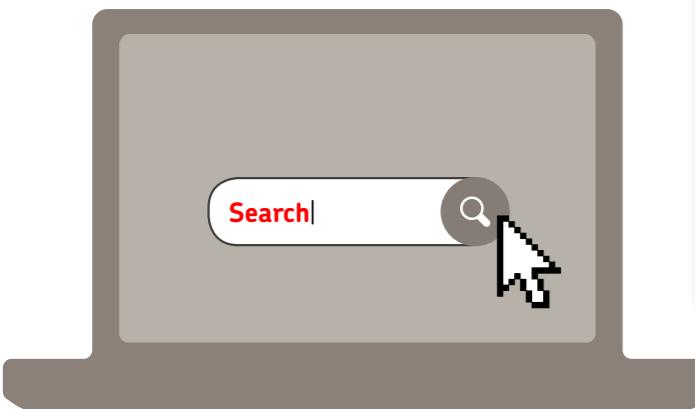
The profile of these shoppers broadly matches that of all online shoppers in Germany, not just those buying from the UK. However, those from higher socio-economic groups are more likely to shop from the UK.

And they know what they're looking for too. In fact, 33% of online shoppers purchasing from the UK have specifically searched for UK retailers and 36% made the decision whilst in the process of shopping online.

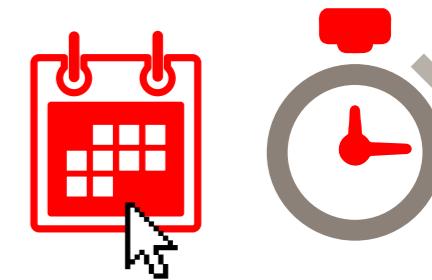
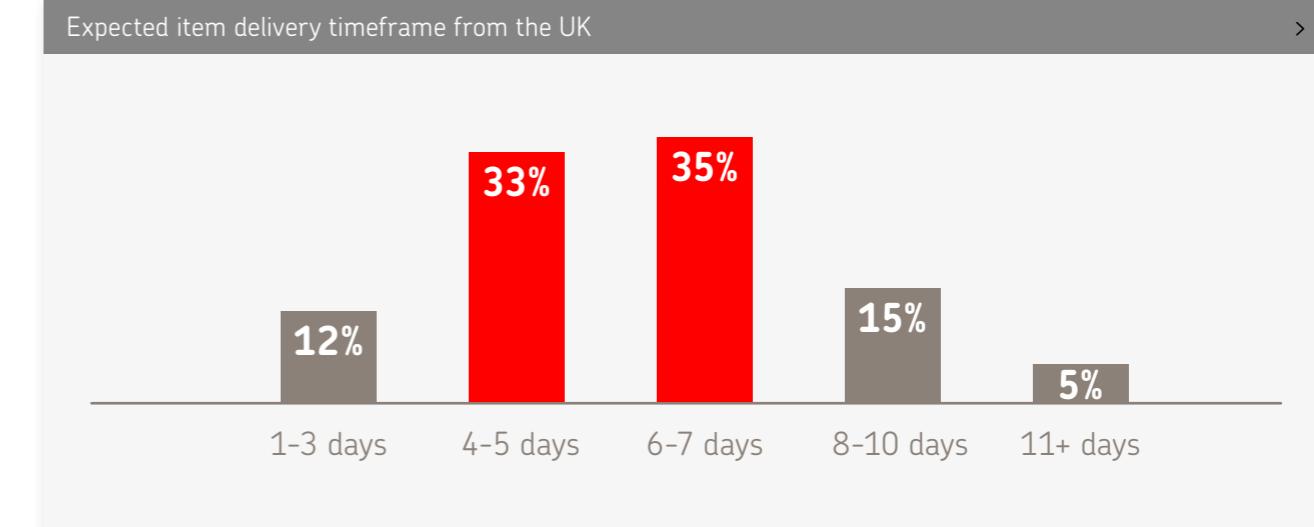


Expectations of delivery timeframes

This shopping experience is supported by search engines, helping online shoppers find what they're looking for on UK sites.



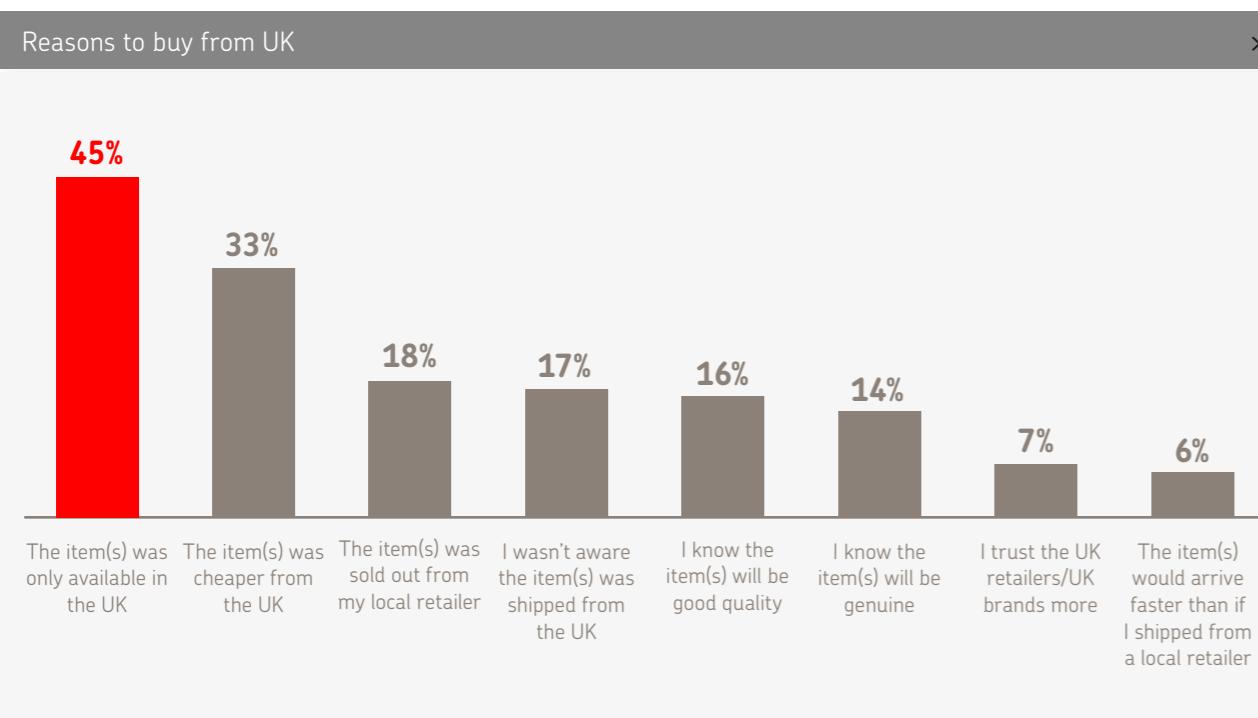
As with many other European countries, online shoppers in Germany expect delivery from the UK within four to seven days of purchase. At Royal Mail our International delivery services provide delivery to Germany within 3 - 5 days which is great news so you can exceed shopper's delivery expectations.



Why buy UK?



Product availability and reasonable prices encourage more online shoppers in Germany to choose UK based retailers.

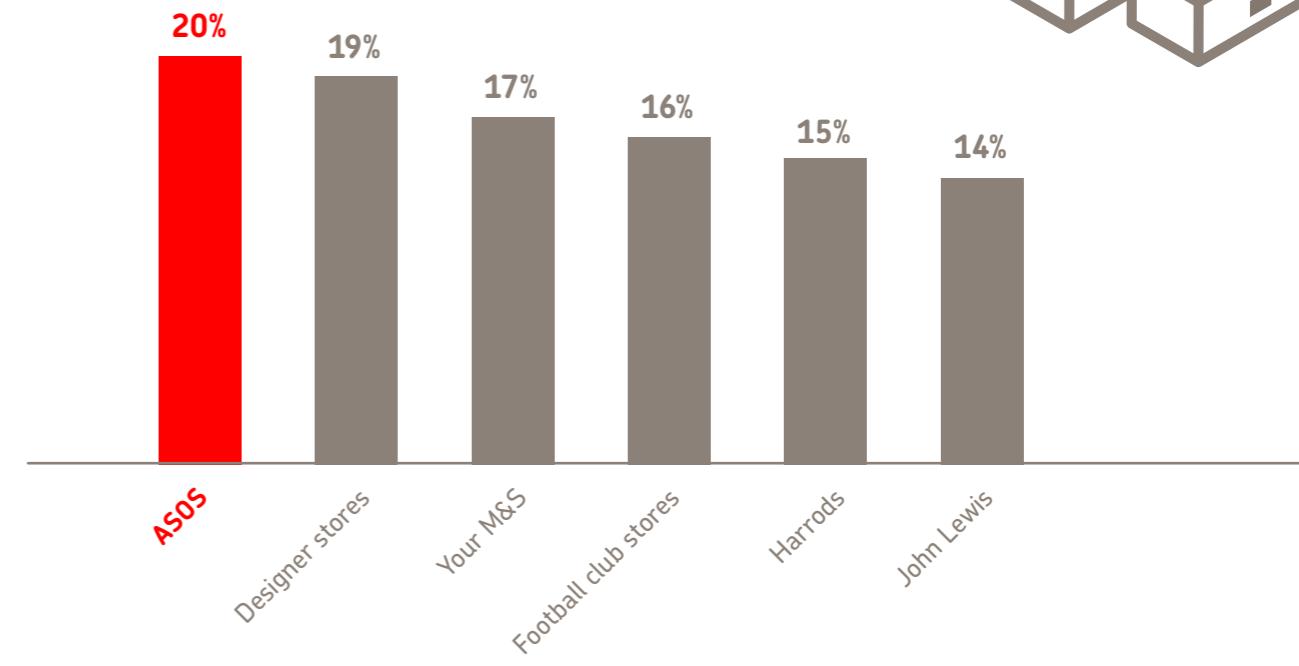


Where do they shop?



ASOS, as well as designer stores, are the most popular retailers for online shoppers in Germany.

Which of the following websites have you ever bought from?



Getting over the obstacles: encourage customers to shop more

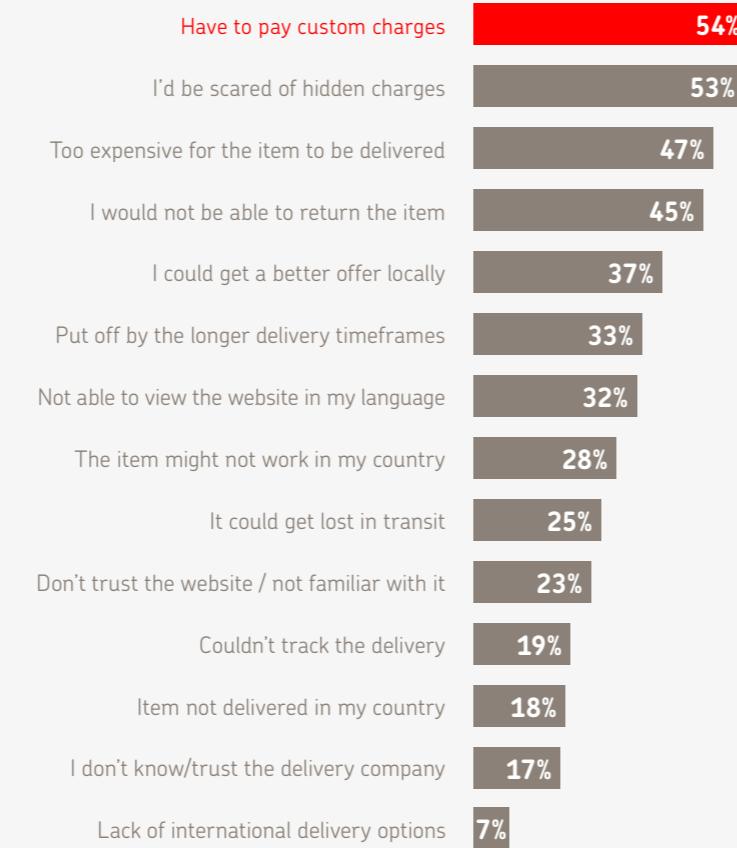
Although many shoppers choose to shop specifically with UK retailers, just under one third consider it to be a risk to purchase from overseas, which is mostly linked to inflated delivery costs.

Risks of purchasing from a UK website >

32%

do consider it to be a risk to purchase goods online from the UK

Barriers to purchasing from the UK:

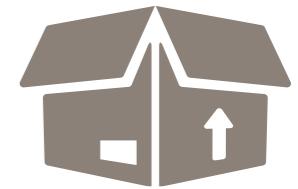


Reasons for shopping more from the UK

Online shoppers in Germany are clearly open to purchasing from UK retailers and there's potential for further growth too.



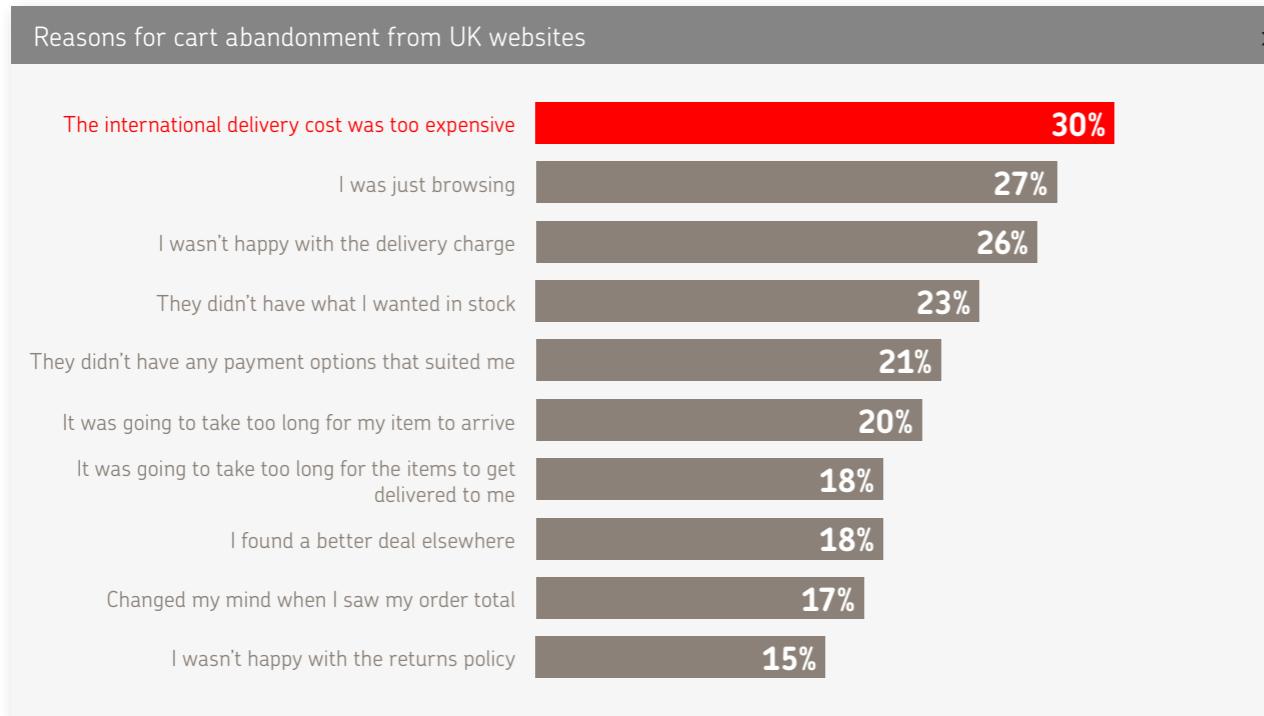
The option to pay in euros and giving clear information could help drive sales to this market.



Cart abandonment when shopping from UK websites



When shopping online with UK retailers, German shoppers are often just browsing. This and high delivery costs contribute to shoppers abandoning their baskets.



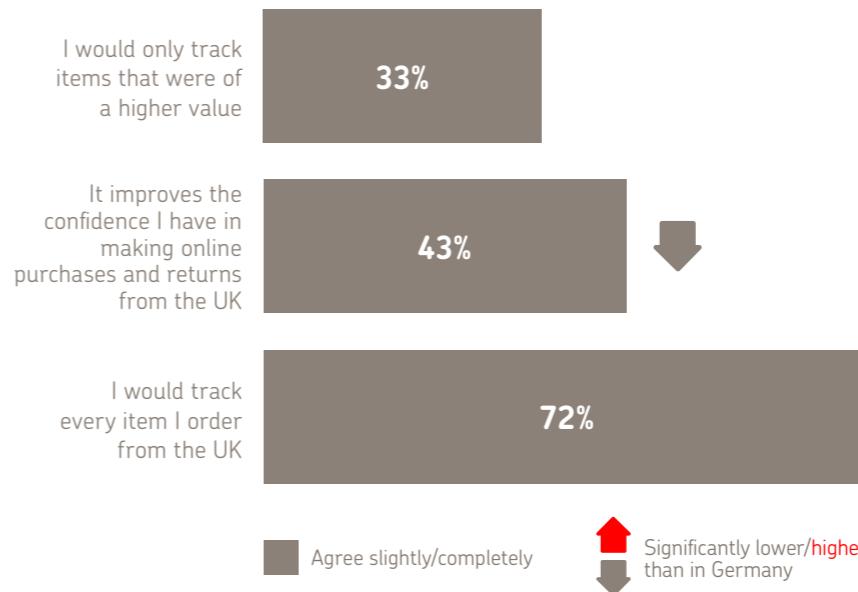
The importance of tracking when shopping from the UK



Having the option to purchase products from the UK with a tracked delivery service is important to online shoppers in Germany, but it's not the sole factor in boosting buyer confidence.

With Royal Mail you can offer shoppers tracked delivery with International Tracked & Signed or International Tracked.

Tracking deliveries from the UK:



Vs. Online shopping in Germany

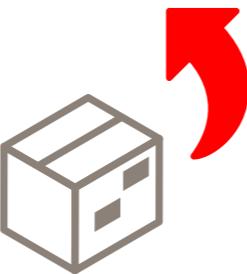
31%

76%

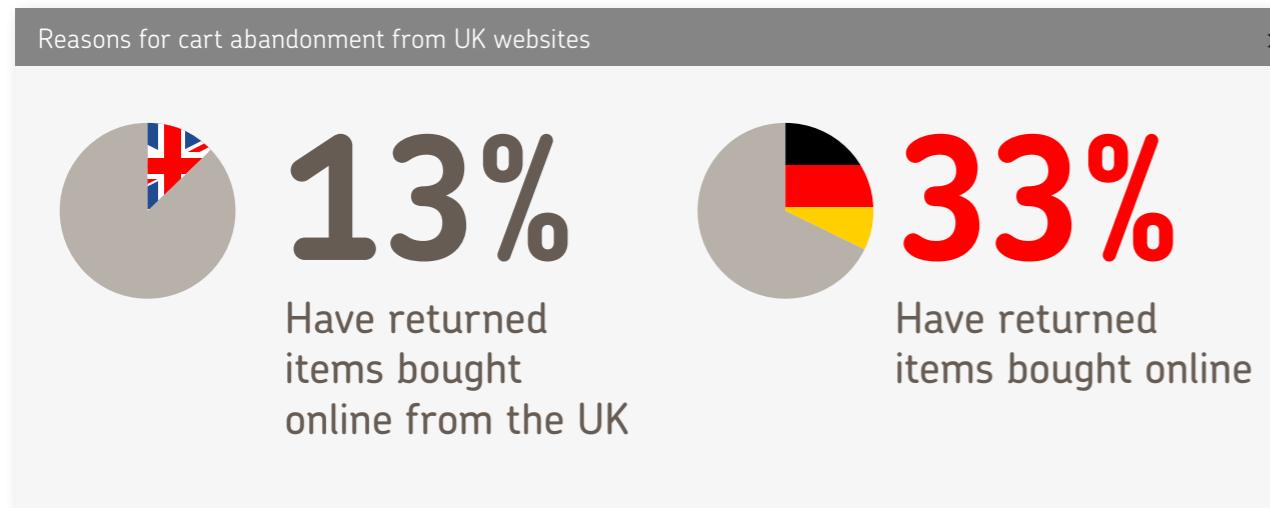
73%



Returns for items bought from the UK

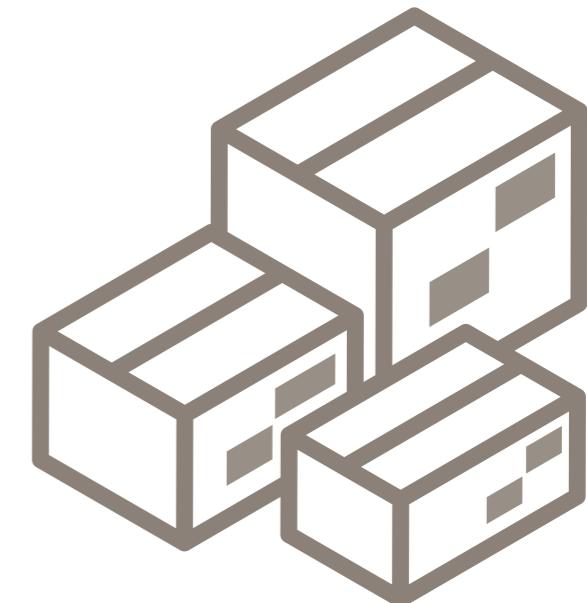


One in three online shoppers in Germany have returned an item bought online in the past three months. But when shopping from a UK retailer, this is much less likely to happen.



Preferred and trusted delivery

91% of online shoppers in Germany trust DHL Deutsche Post to deliver the goods. And because we partner with them, we can continue to provide an impeccable service for you and your customers.



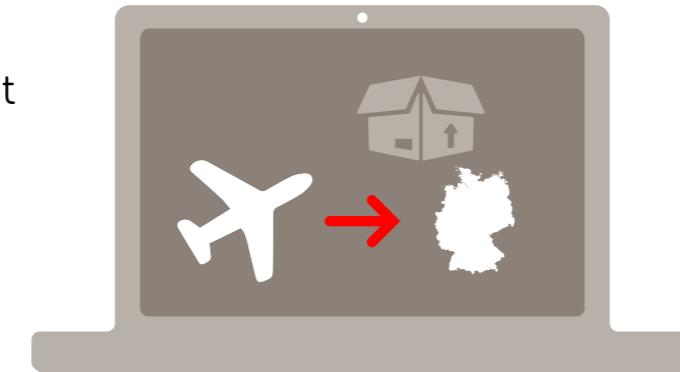
We help you deliver to Germany

Thanks for reading – We hope you found it useful. If you want to find out more about how we can help with your deliveries to Germany, simply get in touch with your Royal Mail Account Manager or call us on **08457 950 950***.

To read more about our research into the needs of online shoppers in the UK, China, Australia, USA and France, please visit royalmail.com/deliverymatters.

About this research

1,500 online shoppers who had bought items online in the last three months (other than groceries) completed a 15-20 minute online survey between 15 April and 29 April 2015.



Our products



We have a range of tracked and signed options, delivering to over 220 countries and territories worldwide. We deliver to Europe in 3-5 days and the rest of world in 5-7 days. We offer up to £50 inclusive compensation with extra cover of up to £250 available.



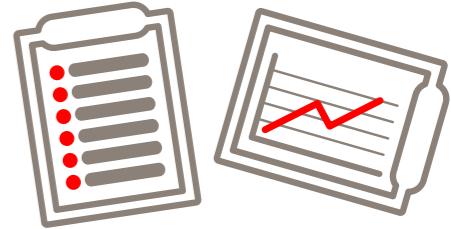
In Germany, we offer a range of delivery services, including International Tracked & Signed, International Tracked and International Business Parcels. We work closely with Deutsche Post, making sure we have the expert, local knowledge we need to deliver in Germany.



Making it easy to access Germany

You can now send 1,000 or more tracked items a year across the UK and internationally, including returns. And by bulking your volumes, you'll benefit from a better price too.

We make delivery simple. Our online despatch tool, Despatch Manager Online (DMO), makes managing orders easy, while our Shipping API uses API technology to communicate with your order processing systems. And they're both free for all Royal Mail contract customers.



Royal Mail



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