EUROPE B2C E-COMMERCE DELIVERY 2014

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Europe B2C E-Commerce Delivery 2014

General Information

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Questions Answered in This Report

- What are key trends and developments on the European B2C E-Commerce delivery market?
- What are the preferences of online shoppers in various countries with regard to delivery?
- What delivery options do the key B2C E-Commerce players offer in the top European markets?

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Key Findings

Online shoppers in Europe seek low cost and convenience in delivery

Online shoppers in Europe value free shipping. Free delivery for future purchases was expected almost two thirds of online shoppers in Germany, Switzerland and Austria. In those Central European nations the online retailers focused their efforts on timely delivery. Same day delivery is becoming the standard for online merchants in Germany, even though consumers would prefer free delivery within two or three days. High delivery cost was among the main reason for abandoning an online shopping cart in Germany.

In Western Europe, online shoppers in the UK are looking for wider delivery options, with free delivery as one of the key factors in making a purchase decision. In France, the national postal operator La Poste was the leading player on the B2C E-Commerce delivery market in 2013. A third of online shoppers in France chose an online retailer based on the speed of delivery. The share of online shoppers in the Netherlands indicating speed of delivery as important grew in 2013. In Spain, length of delivery time was the reason for close to 20% shoppers to abandon their online shopping cart.

The B2C E-Commerce delivery systems in Eastern Europe respond to a variety of challenges. The delivery market in Russia is growing rapidly, with most of the increase going to couriers rather the postal system. As for delivery times, half of Russian online shoppers were willing to wait for their online purchases to be delivered within one week, however, in reality, over a third of online shoppers had to wait for one to several weeks for delivery, and over 10% for several months.

In Poland, the majority of online shoppers waited just a couple of days for delivery of online purchases, and majority of Polish shoppers perceived delivery costs to be too high. The presence of a home delivery option was a popular reason for shoppers in Turkey to buy online and not in store in 2012. Moreover, the majority of online shoppers in Turkey chose a particular store because of rapid and reliable home delivery. On the other hand, In Ukraine, the vast majority of online shoppers prefer to pick up their online purchases themselves from the courier's office, the post office or from the store.

In the Scandinavian nations, home delivery was the most preferred option and online shoppers were willing to accept a delivery time of several days to lower the cost of the purchase.

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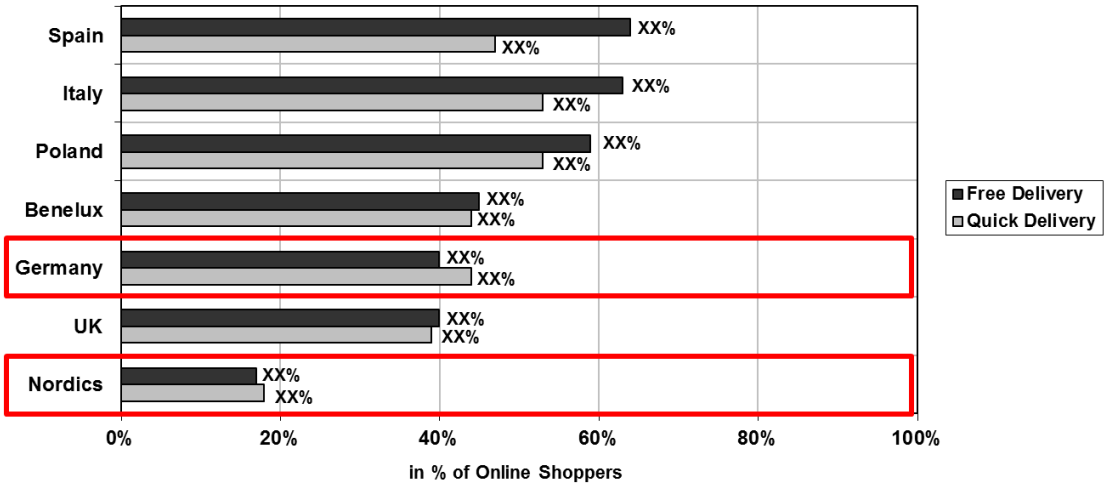
Online shoppers in most selected European countries saw free delivery as more important than quick delivery, except for Germany and Nordics.

Europe: Share of Online Shoppers Who Consider Free Delivery Very Important, Compared to Share of Online Shoppers Who Consider Quick Delivery Very Important, by Selected Countries, in %, 2013



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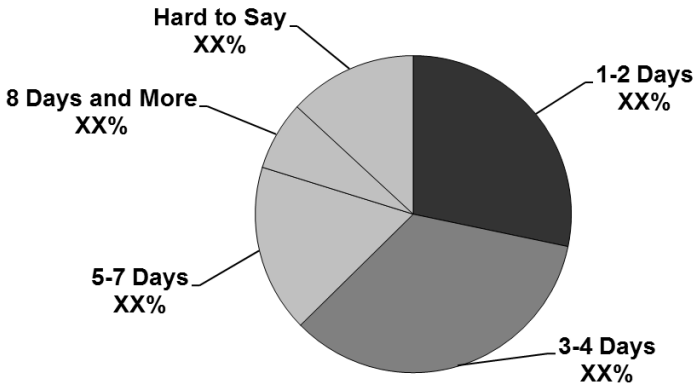
In Poland, XX% of online shoppers waited for 1-2 days for the delivery of their latest online purchase, while XX% for 3-4 days, as of Dec. 2012.

Poland: Breakdown of the Latest Online Purchase, by Delivery Time in Days, in % of Online Shoppers, December 2012



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Methodology

General Methodology of our Market Reports:

- This report includes the results of secondary market research: By using various sources we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- Cross referencing of data was conducted in order to ensure validity and reliability.
- Besides providing information on the specific topic, every chart contains an Action Title, which summarizes the main statement of the chart and a Sub Title, which gives information about the country, the topic, the unit or currency, and the time period the data on the chart refers to.
- Furthermore, the source of information and its release date are provided on every chart. It is possible that the information included in one chart is derived from several sources. Then, all sources are mentioned on the chart.
- This report also includes rankings. Within these rankings, it is possible that the total amount adds up to more than 100%. If this is the case, multiple answers were possible, and this is then mentioned in the note of the chart.
- If available, additional information about the data collection, for example the time of survey and number of people asked, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies were mostly used. When referencing them in the Action Title, the EUR values are also provided in brackets. The conversions are always made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.
- This report includes mainly data from the last 12 months. The exact publication dates are mentioned in every chart.

Methodology for our Europe B2C E-Commerce Delivery report:

- This report covers the Europe B2C E-Commerce delivery market.
- It contains a Management Summary, summarizing the main information provided in each chapter.
- The second chapter of this report covers regional development, including overview of online shopper preferences regarding delivery and ranking of the most important delivery options as perceived by the consumers.
- The following chapters provide information on B2C E-Commerce delivery in the countries divided by sub-regions. In each chapter, sub-regional development is presented first, where available, while further charts cover individual countries.
- The top country or countries in terms of B2C E-Commerce sales are presented after the sub-regional charts. For the top countries, an overview of the B2C E-Commerce delivery market and trends, as well as online shopper preferences with regard to delivery methods and times are presented, where available. Also, depending on data availability, information about delivery options offered by online retailers is provided.
- Other selected countries in the sub-region are presented in alphabetical order. The scope of the presented data for each country varies by data availability.

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Frequently Asked Questions

WHAT IS THE TARGET AUDIENCE FOR THE MARKET REPORTS?
The target group of our B2C E-Commerce reports are decision makers in top-management, for example from the departments E-Commerce, Business Development, Strategy, Marketing, etc. from large corporations worldwide.

WHAT TYPE OF RESEARCHERS ARE FINDING THE INFORMATION FOR OUR MARKET REPORTS?
yStats.com employs multilingual researchers that research and filter all sources and translate the relevant information into English. This ensures that the content of the original sources is correctly interpreted.

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The reports are all based on reliable sources including national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other sources.

WHAT TYPE OF ANALYSTS ARE WRITING THE MARKET REPORTS?
After the information is researched, it is further analyzed by our international team of research analysts. These analysts have a long experience in the field of E-Commerce research, and they understand the specifications of the market.

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Dr. Marcus Ackermann
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Selected References

Internet, Consulting, Retail, Finance and Other Companies

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- Amazon
- eBay
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- Skype
- Digital River
- First Data
- Citrix Online
- Wirecard
- 1 & 1
- Skrill / Moneybookers
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- CyberSource
- bwin Interactive Entertainment
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Consulting

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- Citigroup
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Other

- Red Bull
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Selected Published Reports

Report	Publication Date	Price (excl. VAT)*
Europe Cross-Border B2C E-Commerce 2014	April 2014	€ 950**
Europe M-Commerce Snapshot 2014	April 2014	€ 450**
Europe Clothing B2C E-Commerce Report 2013	July 2013	€ 750**
Europe Online Payment Methods 2013 - Second Half 2013	December 2013	€ 450**
Europe Online Payment Methods 2013 - First Half 2013	May 2013	€ 450**
Europe B2C E-Commerce Report 2013	September 2013	€ 1,450**
Global Online Gaming Market 2014	February 2014	€ 950**
Global Mobile Gaming Market 2014	February 2014	€ 750**
Global B2C E-Commerce Delivery 2014	May 2014	€ 1,950**
Global B2C E-Commerce and Online Payment Report 2013	May 2013	€ 1,950**
MENA B2C E-Commerce Report 2014	January 2014	€ 1,450**
Africa B2C E-Commerce Report 2013	December 2013	€ 750**
Latin America B2C E-Commerce Report 2013	November 2013	€ 750**
Asia B2C E-Commerce Report 2013	February 2013	€ 1,450**

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Future Reports

Report	Planned Date	Price (excl. VAT)
Global Online Payment: First Half 2014	First Half 2014	To be announced
Global Alternative Payments 2014	First Half 2014	To be announced
China B2C E-Commerce 2014	First Half 2014	To be announced
Europe B2C E-Commerce Market 2014	Second Half 2014	To be announced
Global Online Payment: Second Half 2014	Second Half 2014	To be announced
Global B2C E-Commerce 2014: Emerging Markets	Second Half 2014	To be announced
Global B2C E-Commerce 2014: Mature Markets	Second Half 2014	To be announced
Global Clothing B2C E-Commerce Market 2014	Second Half 2014	To be announced

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4.7 In the event of a customer's default in payment or other apparent credit unworthiness, all remaining claims against that customer shall become immediately due and payable in full. This only applies if the customer is responsible for the default. We shall be entitled to rescind payment terms previously agreed upon and to demand payment in advance or other appropriate security with respect to pending deliveries. A customer shall be deemed unworthy of credit in particular when he files a petition in bankruptcy or composition proceedings.

5. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES
5.1 All copyrights and other intellectual property rights in connection with our products and all contents of our website remain with us. All data carriers remain our property. The customer/user may not modify, publish, transmit, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way exploit any of the products made available by us, in whole or in part, except as expressly permitted under the Contract.
5.2 We, as well as any original sources contained within our product, must expressly be named as the author of any data the customer processes further as contractually negotiated.
5.3 Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, perpetual right to use the products provided for your internal purposes or any additional purposes set out in the Order Form.
5.4 In the event that the parties agree on a "Single User License" under the Order Form, this means that only one (1) individually named user of an organization shall be entitled to access the report(s). In the event that the parties agree on a "Site License" under the Order Form, this means that up to ten (10) users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a "Global Site License", this means that up to ten (10) worldwide users of an organization shall be entitled to access the report. In both cases, the term "organization" refers to your specific company only and excludes any third parties, including affiliates.

6. TECHNICAL INFORMATION
6.1 We shall provide our products in the following standardized data formats: PowerPoint and PDF. For custom research reports, Excel documents may also be provided, upon request.
6.2 You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.
6.3 Upon successful processing of payment, purchases made via the online shop will be immediately available to download. For all offline purchases, upon successful processing of payment, you will receive the requested product(s) and service(s) in the aforementioned standardized data formats, and all additional data pertaining thereto within two (2) business days.

7. DEFECTS AS TO QUALITY
7.1 No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.
7.2 Likewise, no claims for defects as to quality may be derived from entrepreneurial risks – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action's merit.
7.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.
7.4 Claims for defects as to quality expire within one year from the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.
7.5 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

8. LEGAL DEFECTS
8.1 We are liable for products and services infringing on third party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.
8.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order.
8.3 In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third party rights, we shall choose one of the below actions, duly taking into consideration the customer's interests:
a) procuring for the customer the right to use the service; or
b) revising the service to render it free of legal violations.
8.4 Upon our request, the Customer shall assist us with the defense against third party claims according to this section 8, with each of the Parties bearing the costs of the use of its own personnel and counsel.
8.5 Claims the Customer may hold for legal defects expire in accordance with Section 7.4.
8.6 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

9. LIABILITY
9.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.
9.2 Besides Section 9.1, we are not liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health in cases of simple negligence and – subject to the limitations set forth hereinafter – due to damage caused by a breach of a material contractual obligation. Material contractual obligations are obligations that (i) you reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the outcome of performance.
9.3 In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, body or health – is limited to typical and at the time of the formation of this Contract foreseeable damage.
9.4 The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies', employees' and vicarious agents' personal liability.
9.5 Our liability for damages under warranties (Beschaffenheitsgarantien) is limited to instances in which the warranty expressly includes such liability.
9.6 Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 9.1 through 9.5.

10. CONFIDENTIALITY
10.1 The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:
a) were already known or accessible to any third party at the time of disclosure;
b) which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information;
c) must be disclosed by order of and to a government agency or another competent third party; and
d) must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.
In the cases of Sections b) and c) above, the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.
10.2 We may use your company name and logo as a reference so long as no contractual details are divulged.

11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS
11.1 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, the place of payment is Hamburg, Germany.
11.2 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, all disputes arising from or in connection with any Contract between the Parties shall exclusively be resolved through the courts of Hamburg. Governing law is German law under exclusion of the CISG.