UPS PULSE OF THE ONLINE SHOPPER™
A Customer Experience Study

Conducted by comScore
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Welcome to the UPS Pulse of the Online Shopper™ Global Study

The dramatic changes in retailing arising from e-commerce can be felt across the globe. As the population of Internet users grows across geographic regions and consumers become increasingly comfortable buying online, all retailers are competing to create a differentiating online shopping experience to capture their share of the thriving e-commerce market. Consumers everywhere are demanding that retailers focus on the end-to-end shopping experience—from web usability and checkout to delivery and returns. To better understand these consumer preferences, UPS commissioned research with comScore and created the UPS Pulse of the Online Shopper study. It goes beyond topics covered by other studies and focuses on the entire online shopping experience.

Since e-commerce is a global phenomenon, opening up borders and markets worldwide, this second annual UPS Pulse of the Online Shopper was commissioned across multiple geographies. This Global Study helps retailers gain insights into consumer preferences by incorporating findings from the U.S., Canada, Mexico, Asia, Australia and Europe.

The topics addressed were the same across all of the regions and included the following:

- What do consumers want in an online shopping experience?
- How are mobile and social media channels changing consumers’ shopping habits and expectations?
- What do consumers want from retailers in the online checkout and delivery experience?
- What comprises a good returns experience?
- What are omnichannel consumer expectations of retailers?
- What drives repeat customers and retailer recommendations?

Figure 1

Methodology

This Global Study analyses data from a survey of more than 14,000 frequent online shoppers in the U.S., Europe (Belgium, Netherlands, France, Germany, Italy, and the UK), Asia (China, Hong Kong and Singapore), Australia, Mexico and Canada. The study was conducted in February in the U.S., March in the UK and April-June in the remainder of the countries. All shoppers surveyed had to meet the criteria of making at least two online purchases in a typical 3-month period. Among those surveyed, 25% indicated they made 2-3 online purchases,
38% made 4-6 purchases and 37% made 7 or more purchases (Figure 1). Although this is not necessarily a natural breakout, these frequent shoppers provide the best insights into what today’s savvy shoppers want from an online retailer.

Additional country-level details are also available in separate consultation papers for the U.S., Mexico, Canada, Europe, Asia and Australia regions. This sixth consultation paper, the Global Study, focuses on comparisons between the three North American countries, Australia and the Europe and Asia Regions -- with some call-outs for specific countries in these two regions. These region consultation papers can be provided upon request from your UPS Account Manager, or from the U.S., are publicly available at ups.com/comscore2013.

**Internet Population Overview**

Asia has the largest total Internet population of any region at 358 million, the U.S. is second with 192 million and Europe third at 182 million, followed by Canada, Mexico and Australia (Figure 2). Asia and Mexico are the only regions with more than 50% of their total Internet population under the age of 35 (Figure 3). These demographic differences are important to take into account for retailers seeking to expand their markets into Asia and Mexico, where online consumers are much younger than other countries.

**Figure 2**

Total Internet Population (in Millions)  
Persons 15+

Europe* 358 182  
Asia** 14  25  26  192  
Australia  Mexico  Canada  U.S.

Total Internet Population (in Millions)  
Persons 15+

Europe  182  416  152  416  152  416  
Asia  358  650  358  650  358  650  
Countries Surveyed  All Countries

Source: comScore Media Metrix, May 2013. Includes persons age 15+ and includes home and work PCs only.  
*Europe includes Belgium, Netherlands, Germany, France, Italy, and the UK  
**Asia includes China, Hong Kong, and Singapore.
Global e-Commerce Trends

In 2012, just over 30% of all e-commerce sales (in dollars) came from the Asia Pacific region, as North America remained the leader with a 33.5% share. By the end of 2013, though, Asia Pacific is expected to surpass North America for the largest share of e-commerce sales and by 2016, it is anticipated that just under 40% of all e-commerce sales will come from Asia Pacific (Figure 4).

Figure 4

B2C e-Commerce Sales Share Worldwide

Source: eMarketer, Jan 2013
Represents countries beyond those surveyed in this study.
Includes travel, digital downloads and event tickets purchased via any digital channel (including online, mobile and tablet). Excludes gambling.
Includes sales from businesses that occur over C2C platforms; excludes event tickets.
For total B2C e-commerce sales by country (Figure 5), the U.S. remains the overall leader with over $343 billion in 2012 and an expected $385 billion in 2013. The UK was second in 2012, but is anticipated to be third by the end of 2013 with a projected $142 billion. China was third with $110 in 2012 but has seen rapid growth over the past several years and is projected to reach $182 billion in 2013, overtaking the UK in 2013.

**Figure 5**

### B2C e-Commerce Sales

<table>
<thead>
<tr>
<th>Country</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>$109</td>
<td>$125</td>
<td>$142</td>
</tr>
<tr>
<td>China*</td>
<td>$57</td>
<td>$110</td>
<td>$182</td>
</tr>
<tr>
<td>U.S.**</td>
<td>$302</td>
<td>$343</td>
<td>$385</td>
</tr>
</tbody>
</table>

Source: eMarketer, Jan 2013
Includes travel, digital downloads and event tickets purchased via any digital channel (including online, mobile and tablet). Excludes gambling.
*Includes sales from businesses that occur over C2C platforms; excludes Hong Kong.
**Excludes event tickets.

### Key Findings

The Global Study of the *UPS Pulse of the Online Shopper* provides detailed, actionable insights for retailers on how to improve and differentiate the online shopping customer experience in key regions around the world. Some high-level insights and takeaways include the following:

- **Shopper satisfaction is relatively high around the world (71-83%), with the exception of Asia (average of 50%). However, there is room for improvement worldwide in the post-sales process.**
  - U.S. and UK shoppers show the highest level of overall satisfaction.
  - Australian shoppers, while less satisfied overall, are more satisfied with the shopping experience than consumers in Asia.
  - The four countries surveyed in the Asia Pacific region have the four lowest satisfaction scores of anywhere in the world.
  - Consumers across all regions surveyed are less satisfied with the post-purchase experience, especially when it comes to control over the delivery experience (rerouting packages and choosing a delivery date/time) at 42% and ease of making returns at 49%.
**Consumer preferences at the checkout vary across countries/regions and are essential to understand in order to prevent cart abandonment.**

- Consumers in Canada are the most cost-conscious and appear willing to trade speed for cost.
  - 61% say they have abandoned a cart because shipping costs made the total more than expected.
  - 50% say they have abandoned a cart because their order wasn’t large enough to qualify for free shipping.
  - Canadian consumers are willing to wait the longest for delivery of their packages – 9.8 days.
- Consumers in Asia and Europe are less likely to abandon carts due to shipping costs.
  - 45% in Asia and 49% in Europe abandoned a cart because shipping costs made the total more than expected, compared to 61% in Canada, 54% in the U.S. and 53% in Mexico.
- Consumers in Asia and Mexico are more concerned with expedited options, with 50% of consumers in each region rating expedited shipping options as important at the checkout, versus 28% on average for all other regions combined.

**Logistics drives positive customer experiences and retailer recommendations across geographies.**

- “Receiving my package when expected” is the second top driver of positive retailer recommendations across all regions, except Asia where it is ranked fourth.
- Shipping reliability is in the top five drivers of positive recommendations for all countries and first in Mexico.
- Over half of consumers in all geographies say that tracking is “essential,” with two-thirds of respondents in Mexico agreeing.

**Omnichannel* options are important, especially as consumers around the world differ in terms of retailer access preferences.**

- Online shoppers in Europe (79%), Asia (79%) and Mexico (77%) prefer to access retailers via digital channels such as mobile, tablet or desktop devices. Consumers in Belgium (61%) and the Netherlands (71%) are less likely than other countries in Europe to prefer to access retailers through these channels.
- One-third of online shoppers surveyed in the U.S., Australia and Canada prefer to access their favourite retailers in-store versus online.

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*Defined here as providing an integrated mobile, online and in-store experience that enables shoppers to access retailers across channels on their own terms.
Consumers in Asia have the highest percentage of smartphone and tablet owners purchasing goods on their devices; 78% of those who own tablets and 73% of those who own smartphones have made purchases on these devices.

Consumers in Mexico and the U.S. highly value omnichannel options.
- 67% of shoppers in Mexico and 62% in the U.S. want the ability to buy online and make returns in-store (compared to 51% in Asia and 52% in Europe).
- 62% of consumers in Mexico are more likely to shop with a retailer if they offer location-enabled services, such as the push of a coupon to the phone, the highest of any country surveyed.

- **Returns are a critical factor in a positive online shopping experience across geographies, yet consumer behaviour around returns varies by country.**
  - Over half of consumers in every country/region would shop more with a retailer and recommend a retailer to a friend if the retailer has a hassle-free returns policy.
  - Free returns shipping is the most frequently cited element of a favourable returns experience in every country/region surveyed.
  - Although only 30% of shoppers in Mexico have returned an online purchase, 62% of them review a returns policy before making a purchase.
Regional Differences in Satisfaction

Global consumer satisfaction with online shopping is generally high at 66% (those survey respondents selecting the top two boxes on a 7-point scale, Figure 6), but is markedly lower in Asia. Although China and Singapore both have relatively low satisfaction at 60% and 51%, Hong Kong has by far the least satisfied consumers, at just 38%. The U.S. leads in overall satisfaction, at 83%, with Germany (81%) and the UK (80%) the only other countries to reach 80% satisfaction.

The aspects of online shopping that respondents are most satisfied with include those related to the retailer’s website, such as ease of checkout and the variety of brands and products offered (Figure 7). These are areas that indicate that retailers are generally doing a good job with e-commerce fundamentals – offering products consumers are looking for and making the checkout process on a website simpler. Consumers in Asia are the least satisfied with these areas, which is also reflected in their low satisfaction overall. Not shown in Figure 7 are two other items that scored relatively high in Europe – having websites available in the local or preferred language (73%) and international payment and delivery options (63%).

Q10. Overall, how satisfied are you with your previous online purchasing experiences in the past three months?

Figure 6

Overall Satisfaction
7-point Scale, Top Two Boxes

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Satisfaction and Importance

For retailers to get a clearer picture of where they should invest their time and which elements of satisfaction are relatively more important than others, a quadrant analysis was performed to overlay derived importance with satisfaction. Direct and indirect drivers of satisfaction were determined using statistical modelling techniques. Coupling derived importance with satisfaction can provide retailers guidance regarding areas where they should focus to help move the overall satisfaction needle.
The right side of Figure 8 highlights regional differences for aspects of both high derived importance and high satisfaction. These are areas where consumers are satisfied, but retailers should not lose focus on them because they are still fundamental drivers of overall satisfaction. Variety of products and ease of checkout are two aspects that fall into this quadrant for most countries, but there are still several key differences to note. In France and Germany, having a website in the local or preferred language was both of high derived importance and an area where consumers are already relatively satisfied. Mexico is the only country where reliable shipping is both highly important and an area where consumers are relatively satisfied.

The left side of Figure 8 reveals the areas that are of high derived importance, but low satisfaction – areas where retailers should invest their time. In France and Canada, for example, tablet apps rank low on satisfaction but high on importance. In Australia, the rerouting of packages is seen as the most important factor, but satisfaction is low in this area. Mexico was the only country examined where online shoppers indicated the time to receive an order as highly important, yet an area where consumers are relatively less satisfied. In China and the U.S., a clear returns policy also falls into this quadrant, indicating a need for improvement in this area.

Free shipping or anything “free” such as free returns, which surfaces later in this paper, is very often of high stated importance, but not necessarily of high derived importance, depending on the country. Countries where free shipping does have high derived importance include Canada, Australia and Italy. Throughout the paper it will be important to keep areas of high derived importance in mind to better understand how to cater to consumers across the globe.

**Figure 8**

<table>
<thead>
<tr>
<th>High Derived Importance, Low Satisfaction (Invest)</th>
<th>High Derived Importance, High Satisfaction (Maintain)</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">North America</a></td>
<td></td>
</tr>
<tr>
<td>• Time to Receive Order</td>
<td>• Number of Payment Options</td>
</tr>
<tr>
<td>• Ease of Returns &amp; Exchanges</td>
<td>• Ability to Track Online</td>
</tr>
<tr>
<td>• Live Customer Service Rep</td>
<td>• Reliable Shipping</td>
</tr>
<tr>
<td><a href="#">Mexico</a></td>
<td></td>
</tr>
<tr>
<td>• Purchase via Tablet App</td>
<td>• Ease of Checkout</td>
</tr>
<tr>
<td>• Choose Delivery Date</td>
<td>• Variety of Brands &amp; Products</td>
</tr>
<tr>
<td>• Ease of Returns &amp; Exchanges</td>
<td>• Free or Discounted Shipping</td>
</tr>
<tr>
<td><a href="#">Canada</a></td>
<td></td>
</tr>
<tr>
<td>• Number of Shipping Options</td>
<td><a href="#">U.S.</a></td>
</tr>
<tr>
<td>• Ability to Create an Account</td>
<td>• Ease of Checkout</td>
</tr>
<tr>
<td>• Clear Returns Policy</td>
<td>• Variety of Brands &amp; Products</td>
</tr>
<tr>
<td></td>
<td>• Ability to Track Online</td>
</tr>
</tbody>
</table>

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Checkout Process and Cart Abandonment

Examining what information or options are important to online shoppers when going through an online checkout process, 70% globally list free shipping options as important. Other important factors include having a variety of payment options, providing an estimated or guaranteed delivery date and total cost including shipping early in the process (Figure 9).

### Europe

<table>
<thead>
<tr>
<th>Belgium</th>
<th>Freedom</th>
<th>Ease of Checkout</th>
<th>Variety of Brands &amp; Products</th>
<th>Free or Discounted Shipping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collect from Convenient Location</td>
<td>Ability to Reroute Packages</td>
<td>Choose Delivery Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>Ease of Checkout</td>
<td>Variety of Brands &amp; Products</td>
<td>Website in Local or Preferred Language</td>
<td>Ability to Track Online</td>
</tr>
<tr>
<td>Germany</td>
<td>Ease of Checkout</td>
<td>Variety of Brands &amp; Products</td>
<td>Website in Local or Preferred Language</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Free or Discounted Shipping</td>
<td>Variety of Brands &amp; Products</td>
<td>Ability to Track Online</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>Ease of Checkout</td>
<td>Variety of Brands &amp; Products</td>
<td>Number of Payment Options</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Ability to Create an Account</td>
<td>Variety of Brands &amp; Products</td>
<td>Ease of Checkout</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>Green Shipping Options</td>
<td>Purchase via Smartphone App</td>
<td>Choose Delivery Date</td>
<td></td>
</tr>
<tr>
<td>Hong Kong</td>
<td>Ease of Checkout</td>
<td>Number of Payment Options</td>
<td>Variety of Brands &amp; Products</td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td>Choose Delivery Date</td>
<td>Green Shipping Options</td>
<td>Purchase via Smartphone App</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>Ease of Checkout</td>
<td>Free or Discounted Shipping</td>
<td>Variety of Brands &amp; Products</td>
<td></td>
</tr>
</tbody>
</table>

Q11. Based upon your previous experience, how satisfied are you with each of the following aspects of online purchasing?

Top Two Boxes Satisfaction in Most Countries: Top Box in Italy, UK, Australia, Mexico, Canada, and U.S.

* U.S. uses Direct Impact rather than Derived Importance.
Setting Delivery Expectations

A good first step in setting delivery expectations is understanding how long consumers are willing to wait for their packages. Consumers often correlate the distance of the shipment to the time they expect to receive the package. In Europe and Mexico, online shoppers are usually willing to wait around 4 days for domestic shipments and around 10 days for international shipments originating outside the region. Online shoppers in Australia are willing to wait 8 days for domestic packages and in Canada, 10 days (Figure 10). In Asia, over half of online shoppers are willing to wait 4 or more days, but this varies significantly between the Asian countries examined. In Singapore, for example, 86% of online shoppers are willing to wait 4 or more days, whereas in China only 27% are willing to wait this long.

Figure 10

Average Days Willing to Wait for Most Purchases

<table>
<thead>
<tr>
<th>Region</th>
<th>Average Days Willing to Wait</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe (Domestic)</td>
<td>4.3</td>
</tr>
<tr>
<td>Europe (Within Europe)</td>
<td>6.4</td>
</tr>
<tr>
<td>Europe (International)</td>
<td>10.6</td>
</tr>
<tr>
<td>Asia</td>
<td>5.1</td>
</tr>
<tr>
<td>Australia</td>
<td>8.5</td>
</tr>
<tr>
<td>Mexico (Domestic)</td>
<td>4.4</td>
</tr>
<tr>
<td>Mexico (International)</td>
<td>10.0</td>
</tr>
<tr>
<td>Canada</td>
<td>9.8</td>
</tr>
<tr>
<td>U.S.</td>
<td>7.2</td>
</tr>
</tbody>
</table>

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Factors Driving Cart Abandonment

With the majority of online shoppers indicating that they have placed items in the shopping cart but left a site without making a purchase, shopping cart abandonment is a significant issue that represents a lost opportunity for retailers. In Mexico, 70% of online shoppers indicated that they have abandoned their cart due to an estimated delivery time or because a time was not provided. Online shoppers in Asia are the second most frequent abandoners due to delivery time at 65% (Figure 12). Among those who received an estimated delivery date and abandoned their cart, the highest percentage in each country/region said their estimated delivery time was 8 days or more.

Figure 12

Abandoned Cart Due to Excessive Shipping Time or Time Not Provided

Q40. What is the number of days that you are usually willing to wait for most of your online purchases to be delivered? If unsure, please give your best estimate.
*Less than or equal to 5 days.

Q41. Have you ever decided not to make a purchase because the estimated time when you would receive your item(s) was too long or not provided?
Although consumers are generally satisfied with the ease of the checkout process, consumers in different countries abandon carts for different reasons. Among those who have abandoned their shopping carts, shipping cost was the number one cited reason in most countries/regions (Figure 13). Another common reason is wanting total cost information for comparison with other sites. Mexico is the only country with “lack of a preferred payment option” as one of the top three reasons for cart abandonment (46%).

**Figure 13**

**Reasons For Abandonment of Cart**

- Shipping costs made the total purchase cost more than expected
- I was not ready to purchase, but wanted to get an idea of the total cost with shipping for comparison against other sites
- I was not ready to purchase, but wanted to save the cart for later
- My order value wasn't large enough to qualify for free shipping
- Shipping and handling costs were listed too late during the checkout process
- My preferred payment option (e.g. bank transfer, debit card, Paypal, Google Checkout) was not offered
- The pages on the site were loading too slowly
- I didn’t want to register/ create account just to make a purchase
- I wanted to complete the purchase, but got distracted and forgot
- The checkout process was too long and confusing
- I needed the product within a certain timeframe and not enough shipping options were offered
- There was no guaranteed or estimated delivery date
- The returns policy was not clear
- I couldn’t remember my username/ password and I couldn’t checkout without it
- There was a poor selection of shipping companies or the shipping company I like best was not offered

Q24. When shopping online, have you ever placed items in the online cart or basket but then left the site without making a purchase?
Q25. What are some of the reasons that you have abandoned a shopping cart with items you’ve added for purchase?
The Delivery Experience

Since “higher than expected shipping cost” is the biggest driver of cart abandonment for most countries surveyed, retailers should carefully consider the attractiveness of options offered at the checkout.

Online shoppers typically expect faster shipping options to be available, but more often than not will select longer, less expensive options. In Australia (73%), Europe (72%) and the U.S. (46%), for instance, a large number of shoppers expect next-day shipping to be available, but a small percentage of online shoppers in these regions actually select this option most often (Figure 14).

Figure 14

Next Day Delivery - Expected vs. Selected

<table>
<thead>
<tr>
<th>Region</th>
<th>Expected</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>72%</td>
<td>18%</td>
</tr>
<tr>
<td>Asia</td>
<td>73%</td>
<td>18%</td>
</tr>
<tr>
<td>Australia</td>
<td>15%</td>
<td>38%</td>
</tr>
<tr>
<td>Mexico</td>
<td>20%</td>
<td>26%</td>
</tr>
<tr>
<td>Canada</td>
<td>46%</td>
<td>4%</td>
</tr>
<tr>
<td>U.S.</td>
<td>18%</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample Size</th>
<th>Expected Next-Day Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>5,593</td>
<td>72%</td>
</tr>
<tr>
<td>Asia</td>
<td>3,113</td>
<td>73%</td>
</tr>
<tr>
<td>Australia</td>
<td>1,005</td>
<td>15%</td>
</tr>
<tr>
<td>Mexico</td>
<td>1,001</td>
<td>20%</td>
</tr>
<tr>
<td>Canada</td>
<td>1,031</td>
<td>46%</td>
</tr>
<tr>
<td>U.S.</td>
<td>3,043</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q38. When shopping online, which of the following shipping options do you expect online retailers to offer? Choose all that apply.

Q39. When shopping online, which shipping option do you choose most often?

*In Australia, next-day delivery is labelled “Express Post,” which guarantees next-day delivery to 80% of addresses in Australia.

Package Tracking Importance

After the checkout process, consumers are looking for communication about their order. The vast majority (over 95% across the board) of online shoppers indicated that tracking is either “essential” or “nice to have” (Figure 15). Both the format and content of tracking information considered important vary by country, but a consistent theme is that online shoppers want updates via digital methods, primarily through email notifications with tracking numbers. In Asia, there is a greater preference for mobile tracking, with 54% of shoppers listing tracking via a mobile device as important, and 59% citing text message alerts with a tracking number included as important. Shoppers in Mexico place more emphasis (57%) on having a customer service number to call for tracking information (Figure 16).
Q49. Giving me tracking information for my packages is an important service every retailer should offer. Which of the below best describes how you feel about the above statement?

**Figure 15**

Relevance of Tracking Services

<table>
<thead>
<tr>
<th>Region</th>
<th>It's essential</th>
<th>It's nice to have</th>
<th>It's not important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>49%</td>
<td>55%</td>
<td>6%</td>
</tr>
<tr>
<td>Asia</td>
<td>47%</td>
<td>44%</td>
<td>9%</td>
</tr>
<tr>
<td>Australia</td>
<td>49%</td>
<td>55%</td>
<td>6%</td>
</tr>
<tr>
<td>Mexico</td>
<td>56%</td>
<td>44%</td>
<td>1%</td>
</tr>
<tr>
<td>Canada</td>
<td>52%</td>
<td>46%</td>
<td>2%</td>
</tr>
<tr>
<td>U.S.</td>
<td>50%</td>
<td>47%</td>
<td>3%</td>
</tr>
</tbody>
</table>

(n=5,593)  (n=3,113)  (n=1,005)  (n=1,001)  (n=1,031)  (n=3,043)

Q50. What is the most important shipment tracking service that a retailer should offer? Please select all that apply and then your top two in importance to you.

**Figure 16**

Most Important Tracking Services

- Email notifications with a tracking number that I can click on to get the status of my shipment
  - Europe: 65% - 61% - 66%
  - Asia: 66% - 69% - 71%
  - Australia: 61% - 61% - 63%
  - Mexico: 61% - 59% - 64%
  - Canada: 54% - 50% - 57%
  - U.S.: 52% - 46% - 52%

- The ability to track my shipment directly on the retailer’s website
  - Europe: 61% - 61% - 69%
  - Asia: 61% - 63% - 64%
  - Australia: 54% - 56% - 63%
  - Mexico: 54% - 59% - 64%
  - Canada: 54% - 59% - 64%
  - U.S.: 52% - 55% - 63%

- Email message alerting me my shipment will be delivered the following day
  - Europe: 61% - 52% - 52%
  - Asia: 61% - 52% - 52%
  - Australia: 54% - 52% - 52%
  - Mexico: 54% - 52% - 52%
  - Canada: 54% - 52% - 52%
  - U.S.: 54% - 52% - 52%

- Email message telling me my package was delivered
  - Europe: 61% - 52% - 52%
  - Asia: 61% - 52% - 52%
  - Australia: 54% - 52% - 52%
  - Mexico: 54% - 52% - 52%
  - Canada: 54% - 52% - 52%
  - U.S.: 54% - 52% - 52%

- An easy-to-find customer service number I can call to ask “where is my package”
  - Europe: 46% - 34% - 34%
  - Asia: 40% - 40% - 40%
  - Australia: 32% - 32% - 32%
  - Mexico: 32% - 32% - 32%
  - Canada: 32% - 32% - 32%
  - U.S.: 32% - 32% - 32%

- Text notification with a tracking number that I can click on to get the status of my shipment
  - Europe: 46% - 47% - 59%
  - Asia: 44% - 47% - 59%
  - Australia: 34% - 32% - 34%
  - Mexico: 34% - 32% - 34%
  - Canada: 34% - 32% - 34%
  - U.S.: 34% - 32% - 34%

- A text message alerting me my shipment will be delivered the following day
  - Europe: 45% - 45% - 50%
  - Asia: 45% - 45% - 50%
  - Australia: 34% - 34% - 34%
  - Mexico: 34% - 34% - 34%
  - Canada: 34% - 34% - 34%
  - U.S.: 34% - 34% - 34%

- The ability to track my shipment with my mobile device
  - Europe: 31% - 36% - 54%
  - Asia: 31% - 36% - 54%
  - Australia: 31% - 36% - 54%
  - Mexico: 31% - 36% - 54%
  - Canada: 31% - 36% - 54%
  - U.S.: 31% - 36% - 54%

- Text message telling me my package was delivered
  - Europe: 29% - 29% - 29%
  - Asia: 29% - 29% - 29%
  - Australia: 29% - 29% - 29%
  - Mexico: 29% - 29% - 29%
  - Canada: 29% - 29% - 29%
  - U.S.: 29% - 29% - 29%

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Factors Driving Retailer Recommendations

Shoppers cited the availability of free or discounted shipping as the top reason for recommending a retailer in every country/region except Mexico, where receiving a product when expected was the top factor instead. Additionally in Mexico, shipping service reliability and safe handling of personal information ranked in the top five factors driving retailer recommendations, at 51% and 45%, respectively. Free and easy returns and exchanges are also important, particularly in Europe and Asia (Figure 17). A third of shoppers in Asia (51% in China) cited the ability to submit product reviews on the retailer’s site as a factor driving positive recommendations (from Asia Study findings but not shown in Figure 17).

Figure 17

Drivers of Positive Recommendations

- Free shipping
- Receiving my product when expected
- Free returns
- Easy returns and exchanges
- Services that help me track the delivery status of my purchases
- Ability to collect my purchase from a delivery location that is convenient to me

Q17. Assuming you are happy with the product you purchased, what service features have actually led you to recommend an online retailer? Select all that apply.

The Impact of Mobile Devices

With the accelerating growth of mobile over the past few years, it is important for retailers to understand how consumers use these devices to engage in online shopping. This includes not only understanding general retailer access preference, but also realising the benefits of making a mobile app available for consumers.

Mobile Playing a Significant Role

Device ownership varies by country/region (Figure 18), with Asia having the highest penetration of smartphones (90%) and tablets (62%). The U.S. falls toward the low end of the spectrum, with 59% of...
shoppers owning smartphones and 40% owning tablets, whilst Europe has the lowest tablet ownership (32%). Given the growing ownership and use of devices, retailers must stay current to gain a fair share of consumers’ mobile spend.

**Figure 18**

![Device Ownership Diagram](image)

**NEWQ2. Which of the following do you use? Please select all that apply.** *In the Netherlands, question is asked to identify device used for online purchases.*

In most regions, over half of shoppers owning smartphones and tablets reported purchasing on their respective devices. Shoppers in Asia have the highest rate of smartphone and tablet purchasing among device owners, at 73% and 78%, respectively (Figure 19).

**Figure 19**

![% Purchasing on Device* Diagram](image)

*Out of smartphone/tablet owners

Also noteworthy is that in Europe, Asia, and Mexico, about 8 in 10 online shoppers prefer to access multi-channel retailers via digital channels. Online shoppers in Australia and Canada are the least likely to prefer digital methods, with close to 4 in 10 online shoppers preferring to visit a physical location (Figure 20).
Mobile Shopping Habits

Creating a mobile app can help prevent comparison shopping, particularly in Mexico (31%), where close to a third of shoppers said they didn’t leave the app to comparison shop when shopping through a retailer’s app. Mobile apps, however, do not seem to prevent comparison shopping in Asia, where nearly three-quarters of online shoppers said they would leave the app to comparison shop. Overall, in every country/region, more than half of consumers leave an app to comparison shop, although between 16% and 32% noted they did not comparison shop as frequently as when they used a browser (Figure 21).
In addition, a mobile app allows retailers to provide targeted social/deal services according to the user's location. Interest in this functionality spans across regions, but is most prominent in Mexico and the U.S., where 67% and 60% of online shoppers said they would like to have this functionality, versus 50% in Canada, 47% in Asia and 46% in Europe.

Improving apps, particularly in terms of facilitating the browsing and transaction processes, can help retailers reduce resistance from customers and improve mobile conversion. With the inclusion of value-added features that leverage what's unique about the mobile medium, namely location-enabled services, retailers can significantly enhance their customers' mobile experience.

**Social Commerce**

The social media component of the survey reveals insights about how and why consumers engage with retail brands through various channels. Figure 22 demonstrates the shift in modes of access for social networking sites by consumers. The amount of time spent on social media sites on personal computers has declined from May 2012 to May 2013, while time spent with social media on smartphones has more than doubled.
Of the shoppers surveyed, the majority indicated using at least one social media site. Facebook is the dominant player by a considerable margin and the sites ranked below Facebook vary by country/region. In China, local sites including Sina Weibo and QQ Weibo are used most often. Facebook provides a means for retailers to engage with online shoppers. "Liking" brands through Facebook is popular across countries/regions, but is most prominent in Asia and Mexico, at 81% and 76%, respectively (Figure 23). Just under half of consumers in Europe engage with retailers by liking their brand on Facebook.

**Figure 23**

"Like" Retailer on Facebook

Those who "like" a brand on Facebook do so for various reasons, with a significant number of shoppers saying that retailers occasionally offer special promotions for Facebook "fans" (Figure 24). The majority in
all countries pay at least some attention to Facebook updates from retailers (Figure 25). This finding highlights the importance of Facebook as a marketing channel for retailers given its combination of audience reach and engagement with promotional content.

Figure 24

**Reasons for “Liking” a Retailer/Brand on Facebook**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Europe (n=1,744)</th>
<th>Asia (n=1,477)</th>
<th>Australia (n=420)</th>
<th>Mexico (n=693)</th>
<th>Canada (n=480)</th>
<th>U.S. (n=1,493)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am a fan of all (or most) brands that I am associated with</td>
<td>26%</td>
<td>30%</td>
<td>32%</td>
<td>32%</td>
<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>I like to actively voice my opinion to the brand on Facebook</td>
<td>32%</td>
<td>38%</td>
<td>25%</td>
<td>35%</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>The retailer incentivised me to “Like” its Facebook page/application</td>
<td>41%</td>
<td>38%</td>
<td>23%</td>
<td>44%</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>I find it’s an easy way to stay up to date with a retailer</td>
<td>44%</td>
<td>45%</td>
<td>29%</td>
<td>45%</td>
<td>39%</td>
<td>46%</td>
</tr>
<tr>
<td>The retailer occasionally offers special promotions for its Facebook fans</td>
<td>59%</td>
<td>44%</td>
<td>59%</td>
<td>44%</td>
<td>36%</td>
<td>49%</td>
</tr>
</tbody>
</table>

SM3. Why did you decide to “Like” a retailer/brand on Facebook? Please select all that apply.

Figure 25

**Amount of Attention Paid to Retailer’s Updates**

<table>
<thead>
<tr>
<th>Attention Level</th>
<th>Europe (n=1,744)</th>
<th>Asia (n=664)</th>
<th>Australia (n=420)</th>
<th>Mexico (n=693)</th>
<th>Canada (n=480)</th>
<th>U.S. (n=1,493)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Little attention</td>
<td>52%</td>
<td>57%</td>
<td>61%</td>
<td>43%</td>
<td>61%</td>
<td>52%</td>
</tr>
<tr>
<td></td>
<td>34%</td>
<td>37%</td>
<td>25%</td>
<td>53%</td>
<td>26%</td>
<td>34%</td>
</tr>
<tr>
<td>Lot of attention</td>
<td>48%</td>
<td>43%</td>
<td>39%</td>
<td>57%</td>
<td>74%</td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td>66%</td>
<td>63%</td>
<td>75%</td>
<td>77%</td>
<td>74%</td>
<td>66%</td>
</tr>
</tbody>
</table>

**Pay Attention to Retailer’s Facebook Newsfeed**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Europe (n=1,744)</th>
<th>Asia (n=664)</th>
<th>Australia (n=420)</th>
<th>Mexico (n=693)</th>
<th>Canada (n=480)</th>
<th>U.S. (n=1,493)</th>
</tr>
</thead>
<tbody>
<tr>
<td>86%</td>
<td>94%</td>
<td>86%</td>
<td>96%</td>
<td>87%</td>
<td>86%</td>
<td>86%</td>
</tr>
</tbody>
</table>

SM4. When you see updates from the retailer on your Facebook newsfeed, how much attention do you generally devote to the update?
Consumers Seek an Integrated Experience across Retailer Channels

When examining aspects driving likelihood to shop with a retailer, there is a preference for retailers who deliver integrated omnichannel options. Across all regions, the single most important factor is the ability to buy online and return at the store (Figure 26). When compared to other areas surveyed, shoppers in Mexico are the ones most actively looking for integrated experiences across retailer channels.

Figure 26

AspectsDrivingLikelihoodtoShopwithaRetailer

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Europe (n=5,593)</th>
<th>Asia (n=3,113)</th>
<th>Australia (n=1,005)</th>
<th>Mexico (n=1,001)</th>
<th>Canada (n=1,031)</th>
<th>U.S. (n=3,043)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The ability to buy online and then make returns at the store</td>
<td>52%</td>
<td>41%</td>
<td>40%</td>
<td>37%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>The ability to buy online and collect in-store</td>
<td>51%</td>
<td>38%</td>
<td>36%</td>
<td>43%</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>The option to conduct one-click checkout online</td>
<td>45%</td>
<td>46%</td>
<td>60%</td>
<td>40%</td>
<td>60%</td>
<td>56%</td>
</tr>
<tr>
<td>The push of a coupon/promotion to my smartphone because the retailer knows I’m in-store or close by</td>
<td>46%</td>
<td>40%</td>
<td>62%</td>
<td>36%</td>
<td>47%</td>
<td>54%</td>
</tr>
<tr>
<td>The availability of an app designed specifically for a tablet</td>
<td>44%</td>
<td>47%</td>
<td>56%</td>
<td>45%</td>
<td>41%</td>
<td>56%</td>
</tr>
<tr>
<td>The availability of a mobile app for a smartphone</td>
<td>41%</td>
<td>36%</td>
<td>51%</td>
<td>36%</td>
<td>41%</td>
<td>38%</td>
</tr>
<tr>
<td>The ability to complete a purchase in-store using mobile device</td>
<td>38%</td>
<td>27%</td>
<td>38%</td>
<td>27%</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>The ability to start a purchase online and then complete the purchase in-store or through the retailer’s smartphone/tablet app</td>
<td>53%</td>
<td>41%</td>
<td>52%</td>
<td>41%</td>
<td>41%</td>
<td>37%</td>
</tr>
</tbody>
</table>

NEWQ_OC3. On a scale of 1 to 7, how likely would you be to shop with a retailer if the following were made available to you? (Top Two Boxes)

Many consumers indicated that offering the ability to buy online and collect in-store made them more likely to shop with a retailer. The U.S. leads in “ship to store” usage at 51%, followed by Europe at 44%, while around a third of online shoppers in other countries/regions have selected “ship to store” (Figure 27). Most online shoppers find the “ship to store” option to be convenient, although attitudes vary by region. 38% of shoppers in Mexico said “ship to store” was convenient for some items but not others, while 38% of shoppers in the U.S. said they chose “ship to store” to qualify for free shipping (Figure 28).
Important to note for retailers is the fact that a large percentage of online shoppers said they have purchased other items whilst in-store after using a “ship to store” service, particularly in Asia (68%). A significant number of shoppers (Figure 29) in Mexico (54%), Australia (43%) and the U.S. (38%) have also purchased items after using this service. These facts suggest that offering a “ship to store” option is beneficial to both consumer and retailer, providing consumers with convenience and cost savings and retailers with increased store sales.

Q48. Of the choices above, which do you find best match your attitude toward buying online and collecting from a store? Please select top two choices only.

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Returns and Exchanges

Returns play a large role for online retailers because shoppers want to lower the risk for those goods purchased without the opportunity to see, touch or feel them. Whilst returns and exchanges represent the last phase of the consumer purchase process, it is often the first consideration when visiting a new retailer site. Given the interest in, and importance of a retailer’s returns policy, retailers can benefit from understanding the factors driving a positive returns experience.

Frequency of Returns

The U.S. ranks highest in shoppers having returned an online purchase (62%), followed by Europe, Asia, Canada and Mexico (Figure 30). The highest percentage in each region say they look at a returns policy before purchasing an item, though almost a third in Asia say they do so after a purchase (Figure 31).

Figure 30

Have Returned an Online Purchase

Q55. Have you ever returned a product you purchased online for a refund or exchange?
Hassle-Free Returns Drive Recommendations

A hassle-free returns policy is likely to lead to positive recommendations and repeat business from online shoppers. Consumers also indicate that having a hassle-free returns policy can lead them to abandon another retailer with a more difficult returns process and focus less on price and more on quality of service. Across all countries/regions surveyed, at least half of online shoppers said they would “shop more with that retailer” and “recommend the retailer to a friend” if the retailer had a hassle-free returns policy. This is especially true in Mexico, where 73% of shoppers will shop more with a retailer and 78% will recommend the retailer to a friend (Figure 32).

If an Online Retailer Offers a Hassle-Free Returns Policy, I Will …

Q60. How much do you agree with the following statements? If an online retailer offers a hassle-free returns policy, I will …

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Elements of a Positive Returns Experience

A positive returns experience is as important as a good returns policy. Consumers find it especially important that the returns process is quick and efficient. In the U.S. and Canada, in particular, consumers find it important to have free returns shipping, a “no questions asked” returns policy and a prepaid returns label. Online shoppers in Mexico are the least likely to cite “free returns shipping” and a “no questions asked” returns policy as elements of a “best” returns experience, suggesting that these tactics are not yet widely available and therefore not expected there (Figure 33).

Figure 33

Elements Included as Part of Best Returns Experience

- **Free returns shipping**
  - Europe: 52% / 49%
  - Asia: 44% / 44%
  - Australia: 36% / 35%
  - Mexico: 47% / 47%
  - Canada: 65% / 65%
  - U.S.: 63% / 63%

- **A “no questions asked” returns policy so if I don’t like the product I don’t have to worry about returning/exchanging it**
  - Europe: 37% / 46%
  - Asia: 30% / 46%
  - Australia: 32% / 48%
  - Mexico: 32% / 49%
  - Canada: 58% / 58%
  - U.S.: 53% / 58%

- **Automatic refund to my debit or credit card once my item(s) is/are received back by the retailer**
  - Europe: 33% / 49%
  - Asia: 36% / 48%
  - Australia: 36% / 49%
  - Mexico: 47% / 47%
  - Canada: 58% / 58%
  - U.S.: 58% / 58%

- **A prepaid returns label right in the box of my original purchase in case I needed it**
  - Europe: 22% / 34%
  - Asia: 24% / 44%
  - Australia: 24% / 44%
  - Mexico: 34% / 53%
  - Canada: 44% / 53%
  - U.S.: 44% / 53%

- **Quick turnaround on product exchanges**
  - Europe: 27% / 34%
  - Asia: 28% / 34%
  - Australia: 28% / 34%
  - Mexico: 31% / 34%
  - Canada: 30% / 34%
  - U.S.: 30% / 34%

- **An easy-to-follow returns procedure with no forms or phone calls**
  - Europe: 26% / 35%
  - Asia: 27% / 35%
  - Australia: 27% / 35%
  - Mexico: 32% / 35%
  - Canada: 33% / 35%
  - U.S.: 33% / 35%

- **Automatic refund to my debit or credit card as soon as I ship my item(s) back to the retailer**
  - Europe: 23% / 32%
  - Asia: 30% / 33%
  - Australia: 30% / 33%
  - Mexico: 31% / 33%
  - Canada: 32% / 33%
  - U.S.: 32% / 33%

- **An easy-to-print returns label**
  - Europe: 17% / 32%
  - Asia: 23% / 32%
  - Australia: 23% / 32%
  - Mexico: 32% / 32%
  - Canada: 32% / 32%
  - U.S.: 32% / 32%

- **Ability to return to a store**
  - Europe: 17% / 36%
  - Asia: 22% / 39%
  - Australia: 17% / 36%
  - Mexico: 23% / 39%
  - Canada: 32% / 39%
  - U.S.: 36% / 39%

Q58. Thinking of the best returns experience that you have had, what elements were included as a part of this experience? Select all that apply.
Conclusions

For retailers seeking to win over online consumers worldwide, this study reveals some universal preferences and behaviours of online shoppers globally, as well as some important regional differences. Most importantly, it reveals actionable information for retailers to better engage shoppers across all phases of the online shopping experience – from pre-purchase to purchase and delivery to post-purchase.

Pre-purchase:
For online shoppers in all countries/regions, the preferred method of accessing retailers is through digital channels, primarily via personal computers/laptops. With the growing penetration of smartphones and tablets, shopping activity on mobile devices is increasing, making it more important for retailers to give consumers the ability to use any of their devices to address shipping needs. At least half of tablet owners in every country/region surveyed have used their tablet to purchase goods online, with this percentage reaching 78% in Asia and 67% in Mexico.

Purchase and Delivery:
When it comes to purchase and delivery, consumers around the world want to know their options up-front, especially around total costs of online purchases. The number one reason for cart abandonment in every country/region surveyed except Asia is that shipping costs increased the total purchase cost more than expected. Many shoppers also report abandoning a cart because they are not ready to purchase, but want to get an idea of total shipping costs and/or save the cart for later.

Excessive shipping time is also a driving factor in cart abandonment, particularly in Mexico and Asia, where 70% and 65% of shoppers respectively have abandoned a cart due to excessive shipping time or time not provided. Whilst offering free shipping is important, retailers can also benefit from having a variety of shipping options/times and providing these options early on in the process. Offering “ship to store” is a good way for retailers to provide a “free” delivery option for consumers with the added benefit of driving store sales.

Post-purchase:
The most critical aspect of the post-purchase experience – and a key driver of the overall online shopping customer experience – is returns. Retailers that offer a hassle-free returns process can increase consumer satisfaction and drive repeat business. Over half of shoppers in Europe, Asia, and the U.S. have returned an online purchase. Additionally, in Canada, Mexico and Australia, the majority of shoppers said they would shop more with a retailer and recommend the retailer to a friend if the retailer offers a hassle-free returns policy. Whilst free shipping for returns is the most often cited element included as part of a shopper’s best returns experience, other features such as a “no questions asked” returns policy, a
prepaid returns label included with the original purchase and an automatic credit/debit card refund are important as well.

In addition, shoppers globally recognise the importance of mobile tracking services and consumers in Asia and Mexico in particular emphasise the ability to receive status updates and track shipments through a mobile device.

Across all aspects of the online shopping experience, retailers can win shoppers over by:

Globally:
• Facilitating a seamless omnichannel experience
• Providing information on delivery options and shipping costs up-front
• Providing tracking information and keeping shoppers informed proactively on delivery status
• Delivering products when expected
• Enabling a “hassle-free” returns experience in the shopper’s channel of choice

Asia Pacific
• Tailoring offerings for a strong and growing base of mobile and social consumers
• Enabling omnichannel experience, especially in Asia, but not as critical in Australia

Europe
• Meeting delivery timing expectations based on package origin as well as providing flexibility for delivery dates
• Improving the post-purchase experience, especially returns and the flexibility of delivery options

Canada
• Catering to cost- and time-conscious consumers
• Having a clear and transparent returns policy

Mexico
• Facilitating convenient and affordable cross-border shopping
• Demonstrating shipping and delivery reliability

U.S.
• Providing information on shipping and delivery options up-front
• Having a clear and easy to understand returns policy
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Country and Region Spotlights

Following are summaries of the online shopper study results for each participating country/region.
Asia Spotlight

Shopper Snapshot: Shoppers in Asia* are the youngest and least satisfied worldwide by far, want goods delivered quickly, use smartphones and tablets to a much larger extent – especially to make purchases and to track orders – and are avid social media users.

Total Internet Population (age 15+)
Source: comScore data
As of May 2013: 650.1 Million
• 58% are under the age of 35 (2nd ♠)
• Y/Y growth 6.6%

Device Penetration
90% own smartphones
• 73% of owners have purchased online via a smartphone
62% own tablets
• 78% of owners have purchased online via a tablet

Retailer Access Preferences
79% of shoppers prefer to access retailers online (via PC, smartphone or tablet) (tied ♠ with Europe)
• 85% of shoppers in China prefer to access retailers online versus 72% in Hong Kong

Checkout Process
65% of shoppers have abandoned a cart due to excessive shipping time or time not provided (2nd ♠)
• 50% of shoppers listed expedited shipping options as important when going through the checkout process (tied ♠)
The most important option in the checkout process among shoppers is the ability to easily view reviews of other buyers, with 72% listing it as important

Delivery Experience
On average, shoppers are willing to wait 5.1 days for purchases
• Shoppers in China and Hong Kong are willing to wait 3.3 and 3.9 days, respectively, while those in Singapore are willing to wait 8.2 days

Shoppers in Asia place greater emphasis on mobile tracking services than other countries/regions surveyed
• 54% listed the ability to track on a mobile device as important (2nd ♠)
• 59% listed text notifications with a clickable tracking number as important (♠)

18% of shoppers expect next day shipping to be available, but only 4% select this option most often
• 63% expect economy shipping to be available, 56% select this option most often

Social Media Engagement
Facebook is the most popular social networking site in Singapore and Hong Kong
• 81% of users “like” a retailer on Facebook, with 59% doing so as an easy way to stay up to date with a retailer
Sina Weibo and QQ Weibo are the two most popular social networking sites in China, with 72% and 65% shoppers using these sites, respectively

*Note: Includes shoppers in Singapore, Hong Kong and China

Denotes results that are highest/lowest among countries/regions surveyed.

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Australia Spotlight

Shopper Snapshot: Shoppers in Australia are similar to those in Europe in overall satisfaction, age and smartphone/tablet adoption. They are willing to wait for deliveries, and while more likely to prefer in-store shopping over online than any other country surveyed, they are also less willing to use “ship to store” services.

Total Internet Population (age 15+)
Source: comScore data
As of May 2013: 14.4 Million
• 39% are under the age of 35
• Y/Y growth 2.7%

Device Penetration
70% own smartphones
• 48% of owners have purchased online via a smartphone
41% own tablets
• 60% of owners have purchased online via a tablet

Retailer Access Preferences
Only 61% of shoppers prefer to access retailers online (via PC, smartphone or tablet) as opposed to in-store or by catalogue

Checkout Process
Shoppers place greater emphasis on retailer sites that contain shopper history
• 50% listed a login to the site to remember purchasing preferences as an important factor during the checkout process (▲) and 51% value access to an order history (▲)
44% of shoppers abandoned a cart because shipping options were listed too late in the process (▲)

Delivery Experience
On average, shoppers are willing to wait 8.5 days for delivery of online purchases
73% of shoppers expect next day shipping to be available while only 15% choose this option most often
15% of shoppers surveyed selected “ship to store” (▼)
• 38% said the ability to buy online and collect in-store would increase their likelihood of shopping with a retailer (▼)

Social Media Engagement
72% of shoppers in Australia use Facebook (2nd ▼), with 62% of these “liking” a retailer on the site
62% of shoppers do not use any location-based social/deal services (2nd ▼)

Shopper Satisfaction
Overall satisfaction 71% (2nd ▼)
Factors driving satisfaction:
• High importance/high satisfaction – ease of checkout, free/discounted shipping, variety of products
• High importance/low satisfaction – ability to reroute packages, ability to purchase through smartphone app, greater shipping options

Denotes results that are highest/lowest among countries/regions surveyed.

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Canada Spotlight

Shopper Snapshot: Shoppers in Canada are slightly less satisfied with the online shopping experience than their American counterparts, are generally cost conscious, often willing to wait on delivery to qualify for free or less costly shipping, and are quick to abandon a cart if shipping costs are more than expected.

Total Internet Population (age 15+)
Source: comScore data
As of May 2013: 25.5 Million
- 43% are under the age of 35 (3rd)
- Y/Y growth 0.6%

Device Penetration
63% own smartphones
- 46% of owners have purchased online via a smartphone
43% own tablets
- 58% of owners have purchased online via a tablet

Retailer Access Preferences
36% of shoppers prefer to access retailers in-store, as opposed to online or through a catalogue (2nd)

Checkout Process
Canada has the highest percentage of shoppers who have abandoned a cart for shipping-cost related reasons of any country/region surveyed
- 61% abandoned a cart because shipping costs increased the total more than expected
- 60% abandoned because they were not ready to purchase but wanted to get an idea of the total cost with shipping to compare against other sites
- 50% abandoned a cart because their order wasn’t large enough to qualify for free shipping

Delivery Experience
On average, shoppers are willing to wait 9.8 days for a purchase
- Among countries/regions surveyed, only shoppers in Europe and Mexico who were expecting international packages are willing to wait longer
- 26% of shoppers expect to see a next day shipping option at the checkout yet only 2% select this option most often

Social Media Engagement
80% of shoppers in Canada use Facebook, but only 58% of these users “like” a retailer on Facebook (2nd)

Denotes results that are highest/lowest among countries/regions surveyed.
Europe Spotlight

Shopper Snapshot: Shoppers in Europe* are generally younger (only surpassed by Asia and Mexico), similar to U.S. shoppers in connectivity via smartphones and tablets – though more likely to use a PC to place an order. They are also likely to return an item and want domestic orders delivered quickly but show more tolerance on delivery times for orders placed on websites outside of their country.

Total Internet Population (age 15+)
Source: comScore data

As of May 2013: 415.6 Million
• 37% are under the age of 35
• Y/Y growth 5.0%

Device Penetration
60% own smartphones
• 49% of owners have purchased online via a smartphone
32% own tablets
• 62% of owners have purchased online via a tablet

Retailer Access Preferences
79% of shoppers prefer to access retailers online (via PC, smartphone or tablet) (tied with Asia)

Shoppers in Belgium are the most likely, among the European countries surveyed, to prefer to access their favourite retailer in-store (34%) and shoppers in Italy are the least likely at 18%

Returns
57% of shoppers have returned an online purchase (2nd)
• 77% of shoppers in Germany have returned an online purchase, compared to 39% of shoppers in Italy

57% of shoppers listed free returns shipping as an element included as part of their best returns experience, by far the most often cited element in Europe

Delivery Experience
On average, shoppers are willing to wait 4.3 days for domestic purchases, 6.4 days for purchases within Europe and 10.6 days for purchases originating from outside of Europe

44% of shoppers have selected “ship to store” (2nd)
• 60% of French shoppers have selected “ship to store”, compared to just 21% of those in Germany

72% of shoppers in Europe expect to see a next day delivery option at the checkout but only 18% select that option most often

Social Media Engagement

Only 70% of shoppers use Facebook, and only 45% of Facebook users “like” retailers

Shoppers in Italy are the most likely to “like” a brand on Facebook (70%) whereas shoppers in France are the least likely to do so (26%)

Shoppers in Italy are also the most likely to pay a lot of attention to retailer updates (44%)

*Note: Includes shoppers in the UK, Germany, France, Italy, Netherlands and Belgium

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**Total Internet Population (age 15+)**

*Source: comScore data*

As of May 2013: 191.5 Million
- 37% are under the age of 35
- 27% are over the age of 55
- Y/Y growth 1.9%

**Device Penetration**

59% own smartphones
- 49% of owners have purchased online via a smartphone
40% own tablets
- 59% of owners have purchased online via a tablet

**Shopper Satisfaction**

Overall satisfaction 83%

Factors driving satisfaction:
- High importance/high satisfaction – ease of checkout, variety of products, online tracking
- High importance/low satisfaction – greater shipping options, ability to create an account, easy to understand returns policy

68% of shoppers said that free shipping led them to recommend an online retailer

**Returns**

62% of shoppers have returned an online purchase, up from 51% in 2012
- 53% of those who had returned an item listed a prepaid return label included with the original purchase as part of their best returns experience
67% of consumers will shop more with a retailer if they offer a hassle-free returns policy

**Delivery Experience**

On average shoppers in the U.S. are willing to wait 7.2 days for purchases
44% of shoppers have abandoned a cart due to excessive delivery time or time not provided
51% of shoppers have selected “ship to store”
46% expect to see a next day delivery option yet only 1% choose that option most often

**Social Media Engagement**

77% of shoppers use Facebook, with 66% of those users “liking” a retailer on Facebook and 86% paying attention to a retailer’s Facebook newsfeed
35% of shoppers use Groupon and 22% use Living Social
47% want a coupon or promotion sent to them on their smartphone when they are in-store or nearby

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Denotes results that are highest/lowest among countries/regions surveyed.
Total Internet Population (age 15+)
Source: comScore data
As of May 2013: 24.5 Million
- 62% are under the age of 35 (활동)
- Y/Y growth 3.9%

Device Penetration
77% own smartphones
- 58% of owners have purchased online via a smartphone
46% own tablets
- 67% of owners have purchased online via a tablet

Shopper Satisfaction
Overall satisfaction 78% (2nd 활동)
Factors driving satisfaction:
- High importance/high satisfaction – greater payment options, online tracking, reliable shipping
- High importance/low satisfaction – time to receive order, ease of returns, access to a live customer service rep

Social Media Engagement
92% of shoppers use Facebook (2nd 활동), with 76% of these users “liking” a retailer on Facebook (2nd 활동)
- 96% of Facebook users who “like” a retailer pay attention to the retailer’s Facebook newsfeed
Over half of shoppers use Twitter and Google+ (활동) and over half also use a location-based social/deal service

Checkout Process
The most important factor during the checkout process is having a variety of payment options, making it the only country/region where free shipping options is not most important.
70% of shoppers have abandoned a cart due to excessive delivery time or time not provided (활동)
46% of shoppers abandoned a cart because a preferred payment option was not available (활동)

Delivery Experience
On average, shoppers are willing to wait 4.4 days for domestic purchases and 10 days for international purchases
57% of shoppers listed the ability to track shipments through a mobile device as an important tracking services (활동)

Returns
Only 30% of Mexican shoppers have returned an online purchase (활동), but 62% review a retailer’s returns policy before purchasing (활동)
73% of shoppers said they would shop more with a retailer and 78% said they would recommend a retailer to a friend if the retailer had a hassle-free returns process

Mexico Spotlight
Shopper Snapshot: Shoppers in Mexico tend to be active on social media, use smartphones and check returns policies closely. They are concerned about website security and having a selection of payment options and more than one in three have shopped on a website outside their country.

Denotes results that are highest/lowest among countries/regions surveyed.

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