



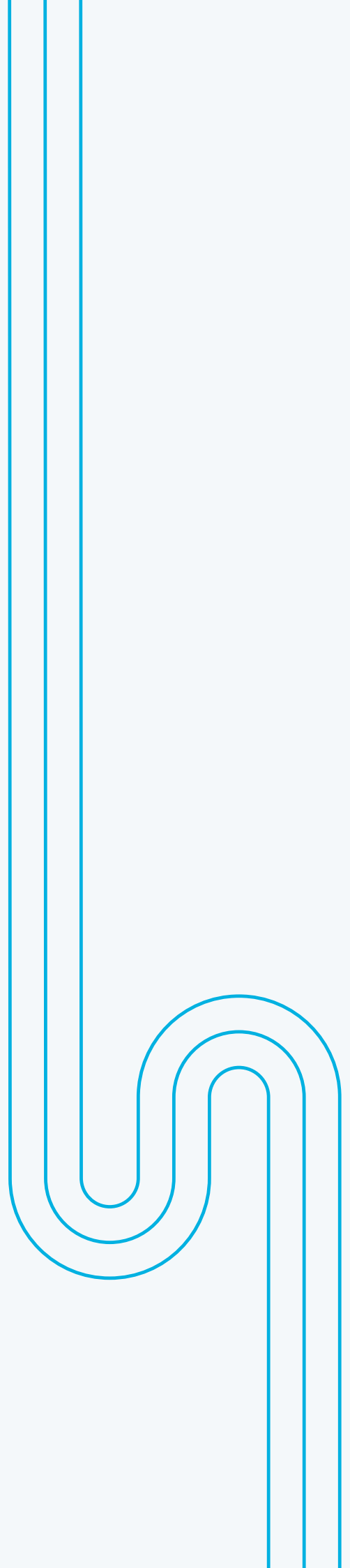
EXCLUSIVE STUDY ON CUSTOMER EXPECTATIONS

# Different countries, Different shipping preferences

What online shoppers in Europe want  
and expect from e-commerce providers

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# Different countries, different habits

Shopping fun or shopping frustration – even the smallest things can influence the consumer’s decision to buy online or not. This is especially true for cross-border e-commerce, which has been on the rise in recent years. But how can online retailers offer the perfect shopping experience? What do they need to consider, and is it true that every country has its own individual preferences? Read this whitepaper to find out about the different customer needs in certain European countries, as well as the best way to fulfill them and ensure a win-win situation for both you and the consumer.

To obtain the data for the report, Seven Senders and the market research institute YouGov teamed up to question 8,602 online shoppers in Belgium, Germany, France, the United Kingdom, Italy, the Netherlands, Austria, Spain and Switzerland about what they need, want and expect from online retailers. On the following pages, you will find out what makes online customers in Europe tick. Alongside many similarities, it also reveals some major differences.





# Insight

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Each section contains brief “insights”, in which Seven Senders provides useful tips on creating an optimal delivery experience for your customers in the different target countries on the basis of the survey results. After all, if you know the exact requirements of the target group, you can closely tailor your service to it and consider factors such as country-specific payment or delivery preferences. This pleasant delivery experience will ensure that the customer remembers your store positively. By keeping online shoppers happy in this way, you will foster long-term customer loyalty and lay the foundations for business success in other countries.



# A question of cost

Costs are not only an important factor for online retailers, but for consumers too. For instance, 55% of the respondents in all countries said that the cost of delivery is the most important criterion when choosing an online store. For this point, the differences between the countries do not exceed 7 percentage points.



For 55% of all respondents, the cost of delivery is the most important criterion when choosing an online store.

## So, should delivery always be free? Not necessarily.

Even if cost is the decisive criterion, this does not necessarily mean that online customers are fundamentally unwilling to pay for delivery. When it comes to the respondents' willingness to pay for delivery, the situation in the individual countries differs depending on the order value.

For as many as 39% of Spanish and 32% of French customers surveyed, delivery always has to be free for them to place an order. In the United Kingdom, on the other hand, the figure is only 17%.

At the same time, however, 52% of respondents in the United Kingdom said that their willingness to pay for delivery depends on the product and its availability. For example, if they are searching for a niche product that is only sold by a few retailers, the cost of delivery plays little or no role. The British came out top for this point, followed by the Italians (46%), the Austrians and Germans (both 36%), the Swiss (33%), the Spanish (30%), and the Belgians and French (both 23%). The country that agreed the least with this point is the Netherlands (21%).

# Insight

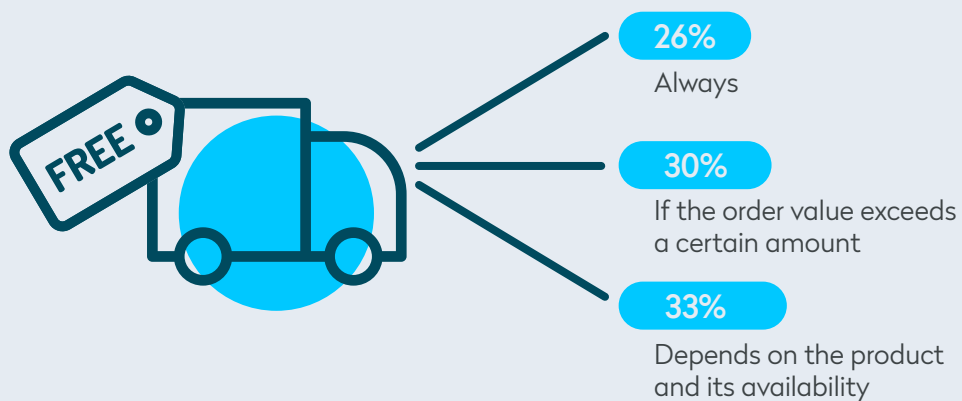
For the countries in which you operate as an online retailer (or would like to operate in the future), your general pricing should take into account the customers' different expectations with regard to cost of delivery. Find out in which countries the end customers are less willing to pay for delivery, and under which circumstances they are more willing to do so (specific order value, availability, etc.). This will enable you to tailor your delivery terms specifically to that country and gain an advantage with the customer.

For many consumers, the order value is what determines whether delivery should be free. The respondents were therefore given the option of indicating the minimum order value for which they would expect free delivery (i.e. EUR 20, EUR 50 or EUR 100). The Dutch also stand out in this respect: 34% of the respondents expect free delivery on orders of EUR 20 or more, closely followed by the Belgians with 30%. By comparison, the corresponding figure in Italy was only 6% for the same order value.

When it comes to free delivery, three general opinions emerge across all the countries. For more than a quarter, delivery always has to be free; for just under a third, the importance of free delivery depends on the order value; for another third, it depends on what kind of product they want to buy and its availability online.

## When should delivery be free?

(average responses across all countries)



# Green e-commerce: demand for sustainable concepts

Packaging waste is increasing, and emissions are rising as more and more delivery vehicles clog up the roads – these are just two of the consequences of the growth in online retail. As the results of the survey show, end customers are very aware of this, and they also have clear (and country-specific) ideas about what sustainable delivery should look like.

In all nine countries, 57% of the respondents would be willing to pay more for sustainable delivery up to a certain amount or depending on the value of the package. That includes 39% who would be willing to pay between EUR 0.10 and EUR 1 more; 2% would even pay more than EUR 1. And for 17%, the extra amount they would be willing to pay for greater sustainability depends on the value of the package.

The Austrians (67%) and Swiss (66%) are the most willing to pay extra for sustainability. The British and Belgians, on the other hand, are more skeptical about additional costs, with 50% and 51% respectively willing to pay more.







People's understanding of sustainable delivery differs from country to country; The respondents were able to offer multiple answers for this question. Across all countries, almost half of the respondents or more believe that using environmentally friendly packaging or a recyclable box counts as sustainable delivery: 63% in the United Kingdom, 57% in Switzerland and Austria, 56% in Germany, 53% in Spain, 48% in Belgium and Italy, and 47% each in France and the Netherlands.

For as many as 52% of Italians, 51% of Germans and 50% of Swiss, sustainable online retail also means bundling together individual shipments sent from the same store.

## Respondents willing to pay extra for sustainable delivery.



**39%**  
Between  
EUR 0.10 and  
EUR 1



**2%**  
More than EUR 1



**17%**  
Amount depends  
on the value of the  
package

# Insight

Online retailers should keep in mind that sustainability matters to customers – and is likely to become even more important in the future. It is therefore advisable – starting with your own company or your logistics partners – to look for ways to make the last mile more sustainable, for example, or at least to offset carbon emissions. Seven Senders already works with sustainable carriers. Plus, Seven Senders customers can choose a product that offsets emissions by investing in certified carbon-reduction projects.

# PayPal, credit card, invoice, instant bank transfer – every country has a preferred payment method

The differences between the various European countries are not just down to different currencies. When asked about their preferred payment method, the respondents in all nine countries paint a mixed picture.

## Online payment provider

In Italy, 51% of e-commerce customers prefer to use an online payment provider such as PayPal, followed by 46% in Germany and 42% in the United Kingdom. A little under or over a third of customers in Spain, the Netherlands, Belgium, France and Austria also rely on online payment providers. In Switzerland, the figure is just 12%.

## Credit card

In France (58%), Spain (47%) and the United Kingdom (41%), credit card is the preferred method of payment.

## Payment by invoice

The Swiss, by some distance, prefer to pay by invoice (50%). This payment method is the most accepted in the German-speaking countries in general, with 34% of German and Austrian customers also using it.

## Instant bank transfer

Similar preferences among neighboring countries can also be observed when it comes to paying by instant bank transfer, which is used by 29% of Dutch and 23% of Belgian customers, as well as by around one tenth of Austrian and British customers. In the other countries, the corresponding percentages are in the single digits.

## Payment on delivery

This payment method is preferred by 11% of Italians and Spaniards, while the percentages in the other countries are in the lower single-digit range.



## Popular payment methods

The two countries with the most responses are shown.



### Online payment provider

51% Italy  
46% Germany



### Credit card

58% France  
47% Spain



### Payment by invoice

50% Switzerland  
34% Germany  
34% Austria



### Instant bank transfer

29% Netherlands  
23% Belgium

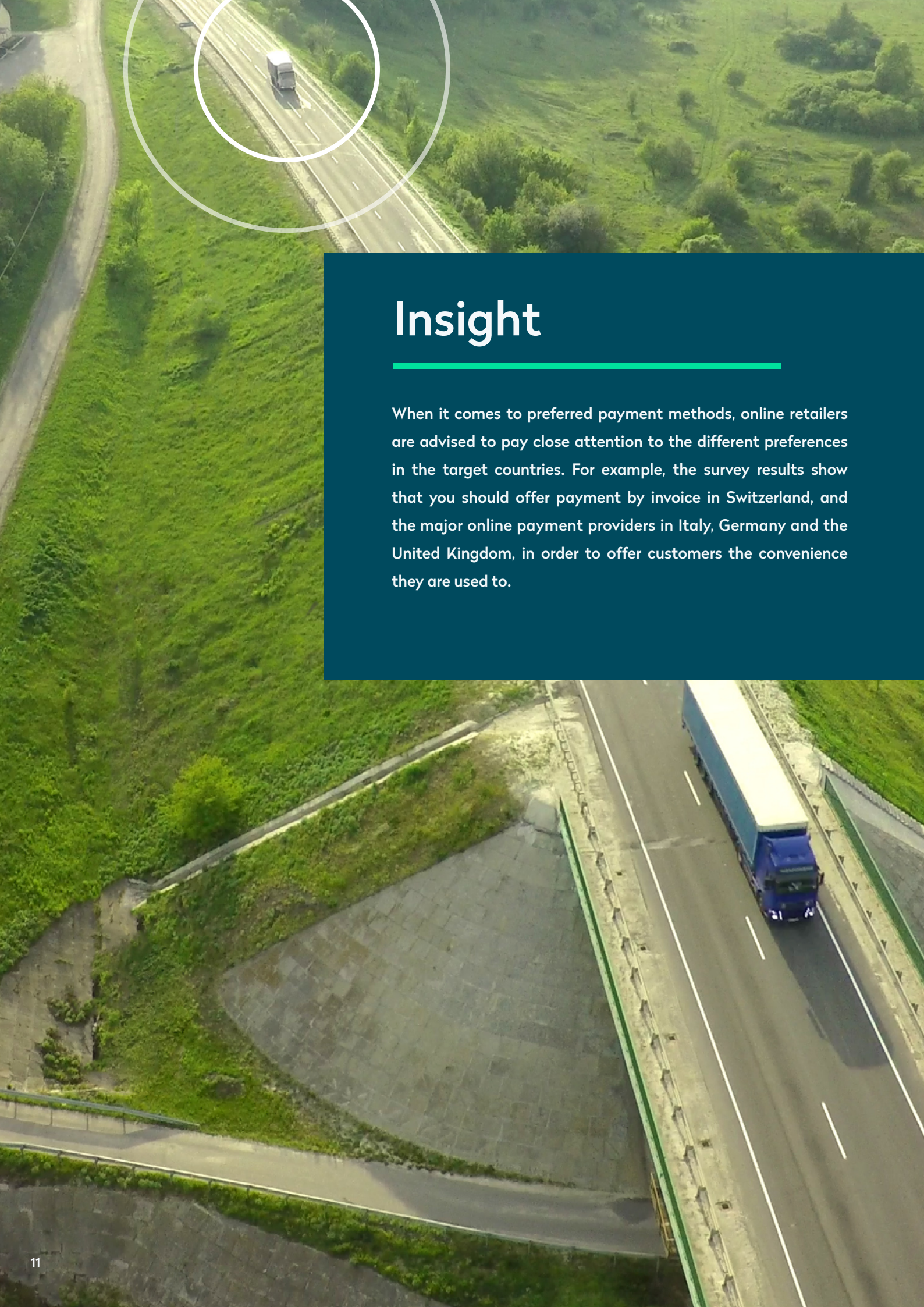


### Payment on delivery

37,5% Italy\*  
11% Spain

\*Source: Seven Senders data



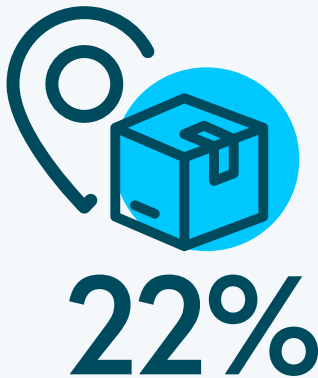


# Insight

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When it comes to preferred payment methods, online retailers are advised to pay close attention to the different preferences in the target countries. For example, the survey results show that you should offer payment by invoice in Switzerland, and the major online payment providers in Italy, Germany and the United Kingdom, in order to offer customers the convenience they are used to.

# Delivery preferences: where, when, and by whom?



For 22% of French respondents, a post office branch or parcel store is the preferred pick-up point.

Ensuring a positive delivery experience for the customer is the be-all and end-all of online retailing and is equally important to consumers across all the European countries. However, the survey shows that there are still some individual preferences at local level.

## Convenient home delivery is preferred

With regard to delivery method, there is a strong tendency toward home delivery, which is preferred by 79% of the respondents on average. The British come out top here with 90%, followed by the Swiss with 88%, and the Austrians with 86%. The countries with the lowest preference for home delivery are Belgium with 77%, the Netherlands with 76%, and France with only 63%. Accordingly, other places of delivery are preferred in those countries: 22% of French and 11% of Belgian respondents would like to be able to pick up their package from a post office branch or a parcel store. As many as 9% of the Dutch and 8% of the German respondents would like to have their online orders delivered to a parcel locker. Even though home delivery is preferred in many countries, pick-up and drop-off (PUDO) is a very popular alternative. The advantage: parcels can be delivered on the first attempt. That not only increases the delivery rate but also protects the environment as it reduces the time spent by drivers on the road.

## Insight

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For the perfect local delivery experience, it is important to give your customers the option of having their package delivered to anywhere they like. A delivery platform provider such as Seven Senders can help you tailor your shipping process to these regional differences. For example, our extensive network allows us to combine the individual competencies of different carriers. And for added convenience, our optimized logistics process means you would only have to deal with one contact person.



# The British don't like to be disturbed in the evening, but the Dutch don't mind at all

In all nine countries, at least half of the respondents would refuse to pay more for evening delivery.



76%



67%



67%



65%



65%



64%



63%



58%



56%

In addition to the desired place of delivery, it is also important to customers that the delivery time is compatible with their own schedule. The survey therefore asked the respondents if they would be willing to pay more for delivery in the evening during the hours of 7 pm and 10 pm. On average across all countries, 64% said they wouldn't. The British are the least likely to (76%), while the Dutch (56%) and Italians (58%) are the most likely.

The Dutch are also the most willing to pay a certain amount extra for evening delivery; 39% would pay between EUR 1 and EUR 4 more. In the other countries, 32% would be willing to do so in Italy, 30% in Germany, Belgium and Austria, 28% in France and Switzerland, and 26% in Spain. For the British, the figure is only 18%. When it comes to willingness to pay extra for evening delivery, an interesting difference can also be observed between age groups: More than 60% of respondents aged between 35 and 54 and as many as three quarters of those aged over 55 said they would not be willing to pay more. The figure among 18- to 24-year-olds is only 42%.



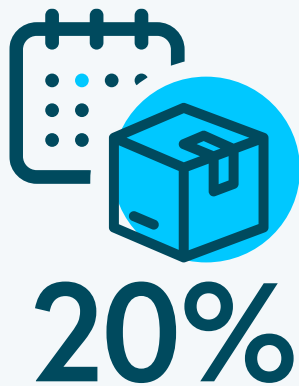
# Option to specify preferred delivery date/time not used much in Germany

Respondents who had used the option of a preferred delivery date/time at least once for their last five online orders.



The responses to our survey also reveal differences across the nine countries when it comes to choosing a preferred delivery date/time. Among other things, we asked how often the respondents had specified a preferred delivery date/time for their last five orders. Of those surveyed in Germany and Austria, 62% and 60% respectively said they had not used this option at all. More than half of the respondents in Switzerland and the United Kingdom (56% for each) responded similarly. In France and the Netherlands, on the other hand, only 37% and 39% respectively said they had not used this option for any of their last five orders.

There are some overall differences in choosing a preferred delivery date/time. This option is the most popular in the Netherlands, where 49% specified that they had made use of it at least once for their last five orders. The figure is considerably lower in France (36%), Belgium (35%), Spain (32%) and Switzerland (26%). In the other countries, less than a quarter of the respondents specified a preferred delivery date/time at least once. In Italy, the figure is as low as 19%.



In Italy, 20% of respondents said they would have liked to specify a preferred delivery date/time but weren't given the option.

One reason for this could be that as many as 20% of Italian customers said they didn't have the option of specifying a preferred delivery date/time, but they would have liked it. Curiously, in Germany, the country with the fewest people specifying a preferred delivery date/time, only 8% said they didn't have the option.

At the same time, the age of the respondents also appears to play a role in whether they specify a preferred delivery date/time. Overall, only 21% of over-55s said they had specified a preferred delivery date/time at least once for their last five orders. The figure for 25- to 34-year-olds is almost twice as high (40%).

## Insight

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With regard to preferred delivery date/time, the survey shows that the habits and requirements among consumers tend to differ across the nine countries that were surveyed. To impress these customers, you should find out in detail about the services offered by local carriers and choose the ones that are best suited to fulfilling the customer's delivery preferences. Different carriers have different strengths in the last mile. With the right choice and combination of logistics partners, you can carve out a decisive competitive advantage, even over established local providers – in Italy, for example, this could be done by offering delivery on the customer's preferred date.

# Time allowances for international orders

Although, overall, quick delivery is an important criterion for almost a quarter of the customers surveyed, they are prepared to make allowances for delivery times when ordering from abroad. For example, 87% will accept a longer delivery time if they know that the store operator doesn't have a branch in their country. The largest group (39% on average) would expect the delivery to take three to four days longer.



Across all countries, 87% of customers accept longer delivery times when ordering from a foreign supplier that doesn't have a branch in their country.

An average of 54% of respondents are not willing to pay more for faster delivery from abroad.

This result is also in line with the respondents' answers when asked what they consider to be an acceptable delivery time for an online order from another country. An average of 39% said three to four days. This answer was the most common in Austria (49%) and Germany (47%). Over a quarter of all respondents – and as many as 31% in Switzerland – even allowed for a delivery time of five to six days. The lowest figure in this group was in Germany (21%).

With customers in all countries factoring in longer delivery times when ordering from other European countries, it is not surprising that more than half of them on average would not be prepared to pay extra for faster delivery from abroad. In Belgium, as many as 62% would refuse to do so. The picture is somewhat different in southern Europe, where 44% of Italian and 42% of Spanish customers would pay extra for faster delivery. For this point, big differences can be seen in terms of the respondents' age; the older the respondents, the less willing they are to pay extra. The figure is only 30% among 18- to 24-year-olds, 48% among 35- to 44-year-olds and 67% among over-55s.





An aerial photograph of a two-lane asphalt road with white lane markings. A white truck is driving on the road, highlighted by a white circle. The road is flanked by green trees and a body of water with lily pads. A dark teal overlay covers the top half of the image, containing the text.

# Insight

For customers ordering online from other European countries, speed is not the most important factor in their decision to buy. However, this does not mean you shouldn't use it to as a point of advantage over other international competitors in the target country.



# British customers want exact information

We also asked the respondents exactly what information they would like to receive from the retailer during the shipping and delivery process. The respondents were given a choice of 10 types of information including dispatch confirmation, delay or completion notification, return confirmation, or no information at all. Here the British want the most information. For seven of the possible answers, the United Kingdom came out top, by a clear distance over other countries in certain respects. The answer “return has been received” was the most common among the German respondents (58% each).

Only a quarter of British respondents want to be notified that the delivery has arrived in the destination country/town. This information is more important to the Spanish (34%) and the Swiss (29%). While customers in the UK stand out for their desire to receive as much information as possible during the shipping/delivery process, the Italians and French do not seem to care as much about being kept updated throughout. Italy, for example, has the lowest percentage for six of the statements, and differs from France by only one percentage point for all three answers.

In both countries, few respondents wanted to receive information about delivery delays, for example, or about whether the order had been received or the paid amount had been refunded. But, as always, there are exceptions: for 62% of Italians, it is important to know the specific delivery time slot. This puts Italy in second place for this point.

## Britain top in terms of information requirements

Below are the three responses with the biggest differences between countries. In each case, the two countries with the most responses for each option are shown in comparison to the two countries with the fewest.

### Order has been received

74%	United Kingdom
59%	Germany
43%	Italy
42%	France

### Out for delivery

73%	United Kingdom
64%	Germany
50%	Italy
40%	France

### Package will be delivered during a specific time slot

75%	United Kingdom
62%	Germany
33%	Italy
31%	France







## So, what do customers want to know?

On average across all the countries, customers are most interested in knowing whether the package has been shipped (74%). By some distance, this is followed by information that the package is out for delivery (57%), that the delivery is delayed (54%), and that the order has been received (52%).

On average, only a quarter of customers want confirmation that the package has arrived in the destination country/town, with Spain deviating the most from the country average (34%).

# Insight

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As the survey shows, proactive customer communication is a must-have in the United Kingdom, while in France and Italy it is more of a nice-to-have, at least in relation to some points. In these cases, it is good to know exactly what information is important to the customer and then focus on providing them with it.

For you as a retailer, it is always of utmost importance that you can access all data and information quickly and easily – tracking, delivery time and location, and any problems or delays in the shipping/delivery process. What is essential for you might also be essential for your customers. In our experience, 85% of end customers click on the tracking link. Good to know: we can create a tracking page for you that matches the design of your store, so that your brand and customer communications are consistent across all stages of the shipping and delivery process.

# A convenient returns process is appreciated

Our survey shows that, when choosing an online store, an easy returns process is an important criterion for 27% of respondents on average across the different countries. We asked the respondents about five aspects of the returns process and found that customer preferences in the individual countries differ by more than 20 percentage points in some areas, and in one of these by almost 50 percentage points.

## 1. Option to drop off the package anywhere

When asked how important it is to be able to drop off the package at any drop-off point/parcel store, the British differ significantly from the other countries. Only 65% of the respondents in the United Kingdom chose the answers “important” or “very important”. In the Netherlands, which had the second lowest value for this question, the figure is as high as 73%. This differs from Belgium, Italy, Austria and France, where at least 80% or more find it important or very important to have a wide choice of drop-off locations.

## 2. Option to download the returns label/form online

Being able to download the returns label or form online is “important” or “very important” for customers in Latin Europe in particular: 82% in Spain, 79% in Italy and 78% in France. For the British, it is not important or not very important that the retailer offers this feature for returns. Just 61% said it was, followed by the Swiss with 60%.

**Big differences: Countries in which respondents consider the returns service to be important or very important.**

Option to drop off the package anywhere



84%



62%

Option to download the returns label/form online



82%



60%


Option to have goods for return collected from home or workplace (home pick-up)



87%



38%



### 3. Option to have goods for return collected from home or workplace (home pick-up)

The Italians (87%) and Spanish (83%) in particular find it “important” or “very important” to be able to have the goods collected from the comfort of their own home or office. In the German-speaking countries, few customers share this view. Austria with 44%, Switzerland with 41% and Germany with only 38%, are at the bottom of the table in this respect.



## Insight

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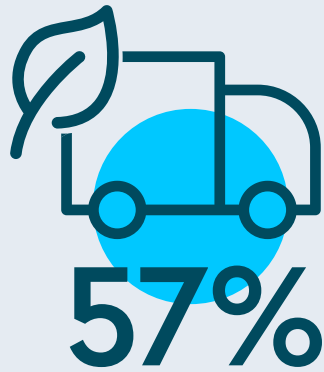
An online store can make itself more attractive to customers by offering an easy returns process. As our study shows, customers in different countries have very different ideas about what really matters and what doesn't when it comes to returning goods. Retailers that operate internationally can benefit from a solution such as the Seven Senders returns portal. Among other things, it allows customers to print return labels easily, and only when they need to. This saves you money as a retailer and can also reduce the number of customer support requests. It is important to offer the right solution for the customers in your target countries. If they are happy with the returns process, they will be more loyal and buy from you more often.

# Summary



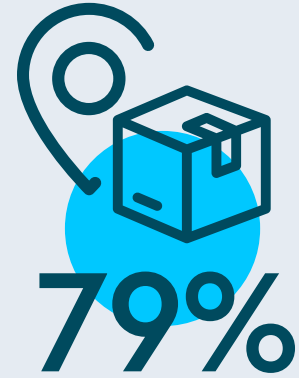
of the respondents said that the cost of delivery is the most important criterion when choosing an online store.

Delivery must always be free for 39% of Spanish and 32% of French customers, but for only 17% of British customers. In France, Spain and the United Kingdom, credit card is the preferred payment method. The Swiss prefer payment by invoice.



of the respondents would be willing to pay more for sustainable delivery.

This is true up to a certain amount or depending on the value of the package. The Austrians (67%) and Swiss (66%) are the most willing to pay extra for greater sustainability.



of respondents want the convenience of home delivery.

However, 22% of French and 11% of Belgian respondents would also like to be able to collect their package from a post office branch or parcel store.

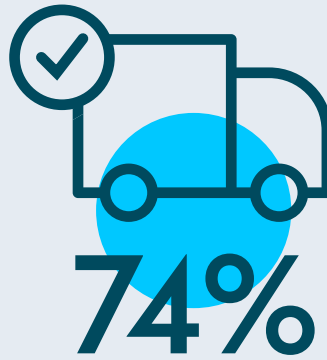
The Dutch like to choose their preferred delivery date/time, with almost half of respondents using this option at least once for their last five orders. In contrast, 20% of Italians said they hadn't used it at all.





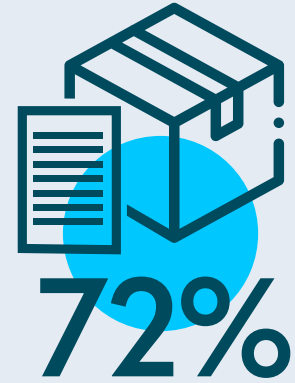
of the respondents accept a longer delivery time from store operators who don't have a branch in their country.

More than half of the respondents would not pay extra for faster delivery from abroad. In Belgium, this figure is as high as 62%.



of the respondents want to be notified that the package has been shipped.

The British, by some distance, want the most information about the shipping and delivery process, while the need is lowest among the French and Italians. The countries differ in terms of the amount and type of information that they would like to have. It is therefore important to be selective and only provide the customer with the information that is actually of interest to them.



of the respondents consider the option to download the returns label/form online "important" or "very important".

Being able to download the returns label or form online is important for customers in Latin Europe in particular: 82% in Spain, 79% in Italy and 78% in France. For 61% of the British customers and 60% of the Swiss, it is not important or not very important that the retailer offers this feature for returns.





# Insight

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As our study shows, what customers in Europe need, want and expect from online retailers can differ enormously in certain respects. Because these preferences cover all aspects of e-commerce – shipping costs, place of delivery, returns management – fulfilling them can present an enormous challenge. It therefore makes sense to rely on a competent partner like Seven Senders. As Europe's largest delivery platform, we not only work with an extensive network of carriers but also have a wealth of international expertise in all areas of shipping and delivery. We also know exactly what makes European customers tick and what they want from an e-commerce store. No matter what challenges or tasks you are currently facing as an online retailer, we have the answers and the right solution for your needs. With our experience and our services, we provide efficient and ongoing support to help you gain a competitive edge in the international e-commerce market.

# About us

*“Our mission is to help online retailers expand and tap into new markets. In our whitepaper, we provide key insights into country-specific differences, which helps retailers to create an optimal delivery experience for end customers while also increasing their own commercial success.”*

Thomas Hagemann,  
Founder and Co-CEO of  
Seven Senders GmbH



Seven Senders was founded in Berlin in 2015 by Dr. Johannes Plehn and Thomas Hagemann. It has since become Europe's leading delivery platform for parcel shipping. With its extensive network of 100 carriers, it gives Seven Senders customers a decisive competitive advantage by enabling them to offer top-quality local delivery.

Seven Senders also offers numerous additional services that simplify cross-border shipping. These include a claims center, insurance, a returns portal, and labeling. In addition, automated shipping notifications, as well as tracking and monitoring solutions, make the complex shipping process transparent and traceable at all times. Furthermore, Seven Senders provides the customer with monthly reports and analysis. This valuable data serves as a basis for further optimizing shipping performance. With Seven Senders, online retailers receive all shipping and delivery services from a single source – the ideal setup for offering customers in other European countries the perfect e-commerce experience.

## Report background

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The data used is based on an online survey conducted by YouGov Deutschland GmbH with 8,602 respondents in the Netherlands, Italy, France, Switzerland, Austria, Germany, the United Kingdom, Belgium and Spain between January 28 and February 5, 2021. The results were weighted and are representative of the population (aged 18 and over) in each country.

Slightly more women (4,429) were surveyed than men (4,173). The majority of respondents were above 55 years old (3,500), 1,557 were between 45 and 54 years old, 1,413 were between 35 and 44, 1,303 were between 25 and 34, and 830 were between 18 and 24. Most of the respondents (3,529) live in an urban area, 2,501 respondents live in a suburban area, and 2,356 live in a rural area; 216 respondents did not provide any details about their residential environment. With regard to the gender, age and residential environment of the respondents, no major differences were observed in the answers, except where specified.

# Legal notice

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