



# De compras por el mundo

Hábitos de consumo en la venta a distancia

## CHINA



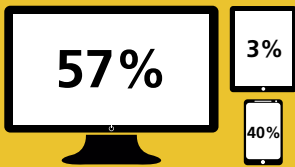
- Estado centralizado unitario administrado por el Partido Comunista Chino
- PIB: 12.253.980 M.\$ (+6,3% en 2015)
- Población: 1.379 millones de habitantes
- IVA general: 17%  
IVA reducido: 13%



### Penetración en Internet



#### Por dispositivo

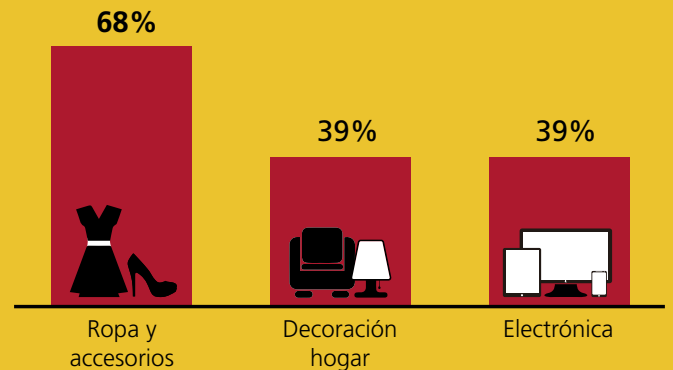


#### Por buscadores

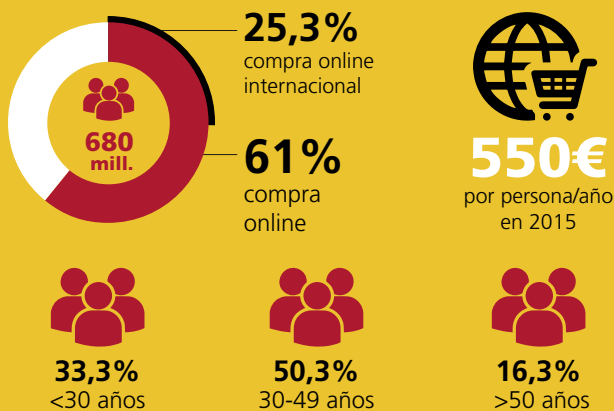


### Sectores más importantes

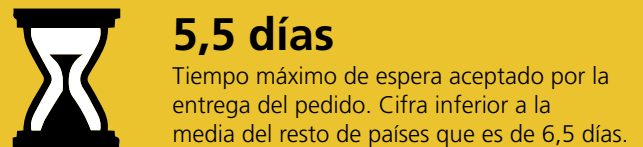
La elección de compra de una de las categorías no excluye la posibilidad de compra en cualquier otra.



### Compras online vs. acceso a internet



### Tiempo de espera aceptado



### Calendario de venta online 2016

- 
- 1 enero: Año Nuevo
  - 14 febrero: San Valentín
  - 14 marzo: White Day
  - 27 marzo: Pascua
  - 8 mayo: Día de la madre
  - 19 junio: Día del padre
  - 31 octubre: Halloween
  - 11 noviembre: Single's day
  - 25 noviembre: Black Friday
  - 28 noviembre: Cyber Monday

### Devoluciones



Similar a la media global del 6%.

### Facturación

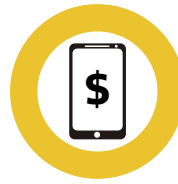


## Información de interés



### 3 pedidos semanales

de media realizados en 2015 por el 70% de los compradores online.



### 70% compradores

a través de móvil son jóvenes nacidos después de 1990.



### 50% transacciones

se produce en las zonas costeras suponiendo la mayor concentración de ventas por Internet.



### 800 artículos

han sufrido la reducción de sus aranceles a la importación desde el 1 de enero de 2016.

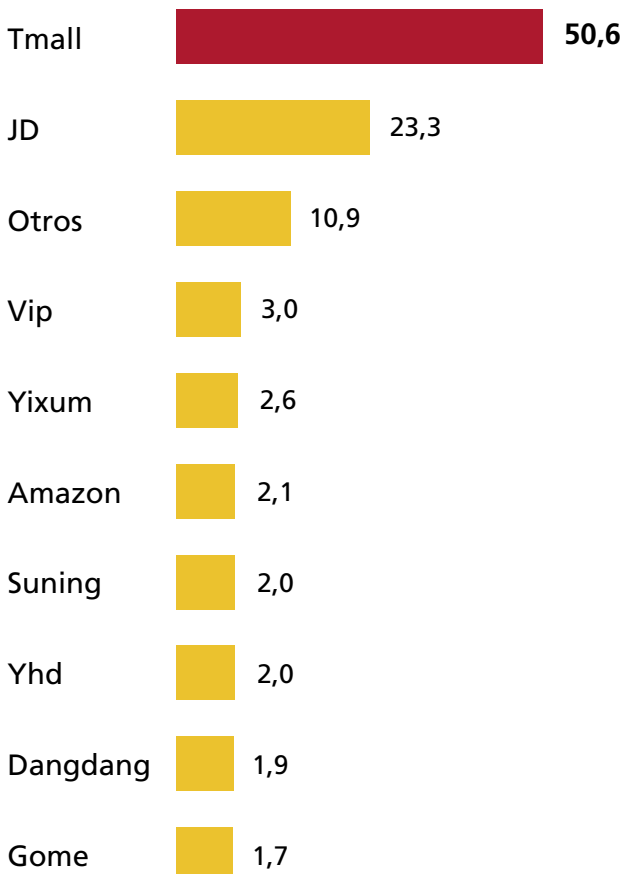


### 3:24 horas

Uso medio de internet por persona.

## Principales marketplaces

El Top10 de los marketplaces del comercio electrónico chino B2C. Datos en % de 2014.



Si necesita más información visite

[www.exportacondhl.com](http://www.exportacondhl.com)





# Country Information China

## **Mandy**

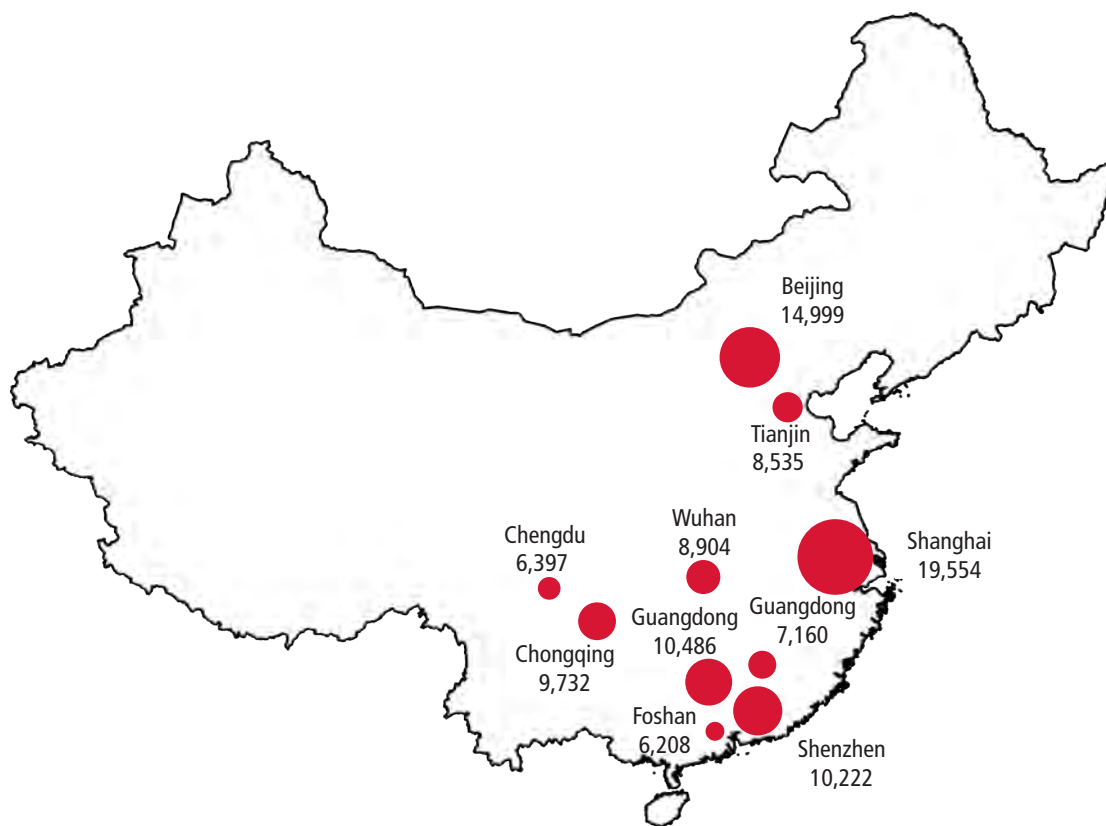
Chinese consumers love eCommerce. They are young, urban, and mobile. Quality and authenticity of products are important.

The Chinese economy \*

In 2012, economic growth in China fell well short of the growth rates from previous years. Last year the Chinese economy remained stable and registered a 7.7% growth. The third session of the 18th Communist Party Conference laid the foundations for greater economic activity. The declared aim was to change from an investment and export-driven economy to an economy based predominantly on domestic consumption. To achieve this, key requirements are the development of pension and health insurance schemes and consolidation of purchasing power in the less developed rural regions.

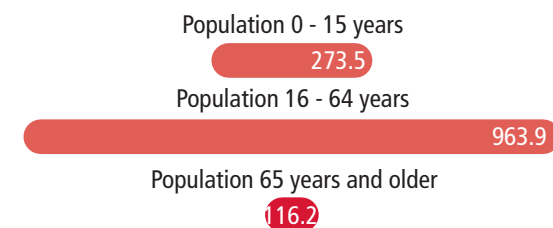
# COUNTRY PROFILE CHINA

The ten largest conurbations in China · 2011 in thousand. \*\*



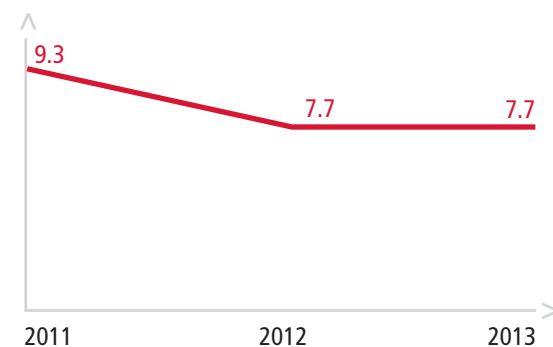
Population, total · 2013 in mn. 1,353.6 \*\*\*

Age distribution · 2013 in mn.



Number of households · 2013 in mn. 344.0  
 Ø Household size · 2013 3.9  
 Unemployment rate · 2013 in % 4.1  
 Inflation rate · 2013 in % 2.6

Economic growth · in % \*\*\*\*



\* Source: Fischer World Almanac 2014, Germany Trade & Invest \*\* Source: Metropolitan areas with 1 million inhabitants and more; United Nations, Department of Economic and Social Affairs, Population Division (2012). World Urbanization Prospects: The 2011 Revision, CD-ROM Edition. \*\*\* Source: Copyright © IHS, 2013. All rights reserved \*\*\*\* Source: Copyright © IHS, 2013. All rights reserved

## Internet use

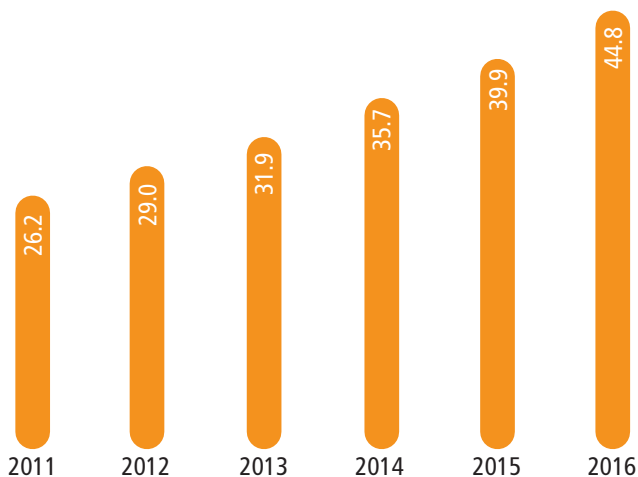
In China, the internet is a recently acquired freedom for independent communication. Chinese consumers are spending more and more time on the internet and social media sites, and are very enthusiastic about mobile communication. Nonetheless, the majority of internet users are located in the coastal regions and larger cities.

## Strong market in the fast lane

The third largest global advertising market continues to grow at an impressive rate of 12% per year and will move into second place behind the USA by 2016. The internet will replace TV as the dominant medium within the next three years. The main drivers behind this growth are online videos and mobile advertisement.

# MEDIA USE IN CHINA

**Total advertising expenditure**  
· in EUR bn. \*



**Internet users** · 2012 per 100 people \*\*



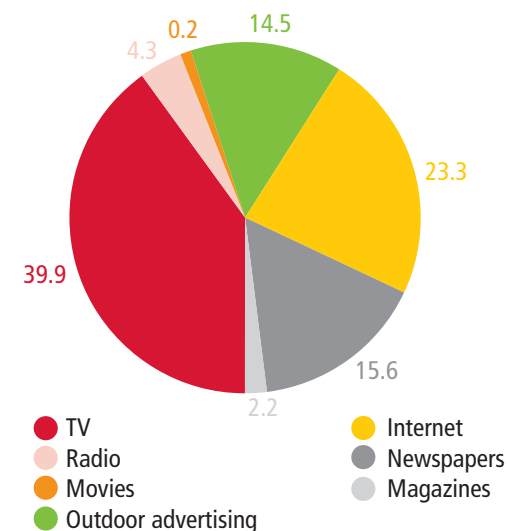
**Permanent access to broadband internet** · 2012 per 100 people \*\*\*



**Cellphones** · 2012 per 100 people \*\*\*\*

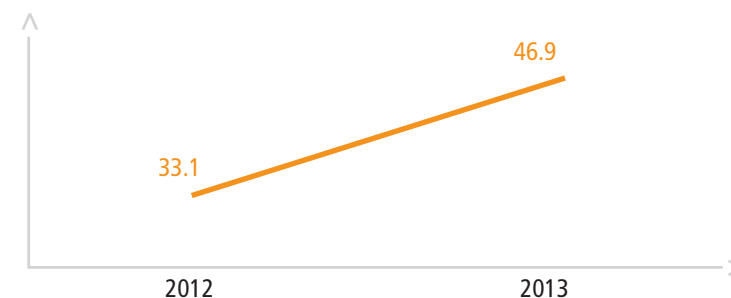


**Share of adspend by medium**  
· in % \*



**Smartphone market penetration** · in % \*\*\*\*\*

Representative domestic population 16+, n = 1,000



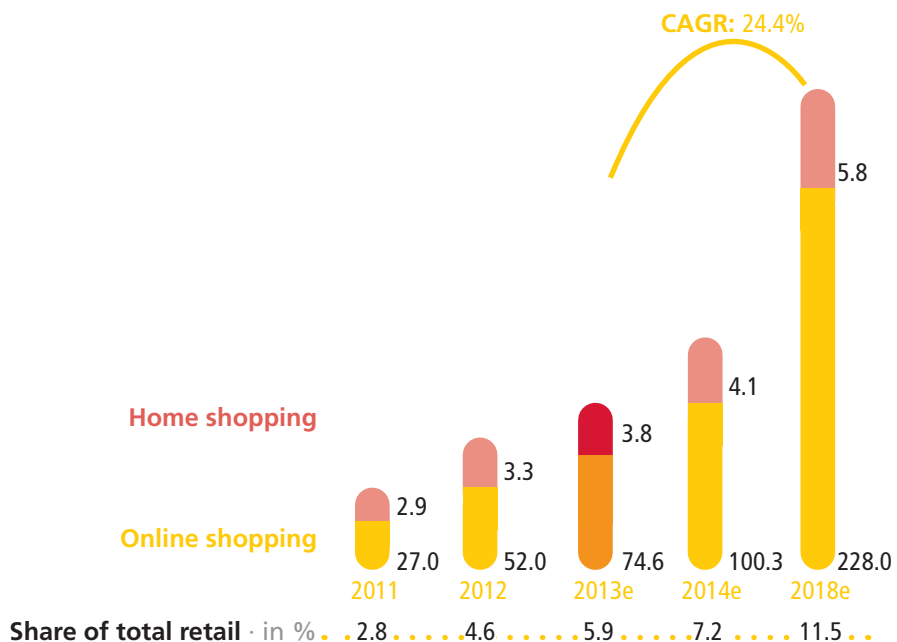
\* Source: Zenith Optimedia, 2013 \*\* Source: Copyright © IHS, 2013. All rights reserved \*\*\* Source: The World Bank \*\*\*\* Source: Copyright © IHS, 2013. All rights reserved \*\*\*\*\* Source: Our Mobile Planet: Google Global Smart phone Study 2013, <http://www.thinkwithgoogle.com/mobileplanet/>

**The dragon takes off**

In China, more and more people are discovering distance selling. Rapid growth far higher than the global average is expected in all categories over the next few years. The fastest growing categories are clothing, food, homewares and consumer electronics.

# DISTANCE SELLING IN CHINA

**Development of distance selling and share of total retail 2011 - 2018**  
· in EUR bn. \*

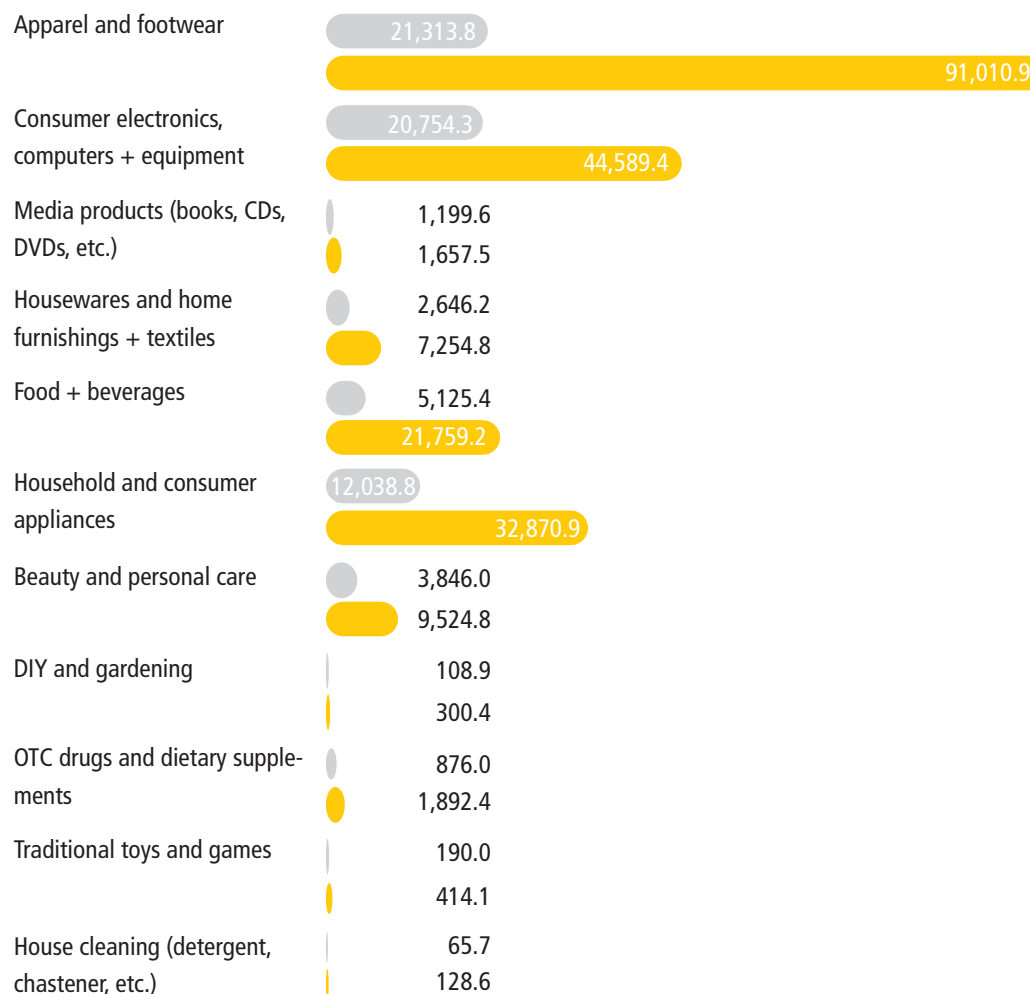


\* Source: Euromonitor International

**Distance selling purchases in 2013 - trend for 2018**

· in EUR mn. \*

● 2013 ● 2018

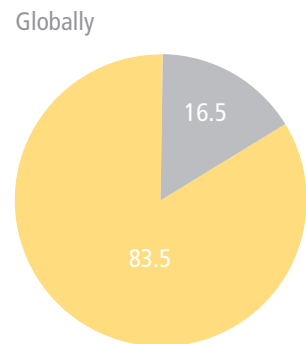
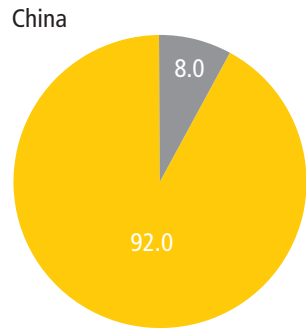


Going all the way

In China, online shopping is becoming extremely popular. Of the target group surveyed, 92% shopped online. A quarter had placed more than 20 orders in the last year.

Use of distance selling

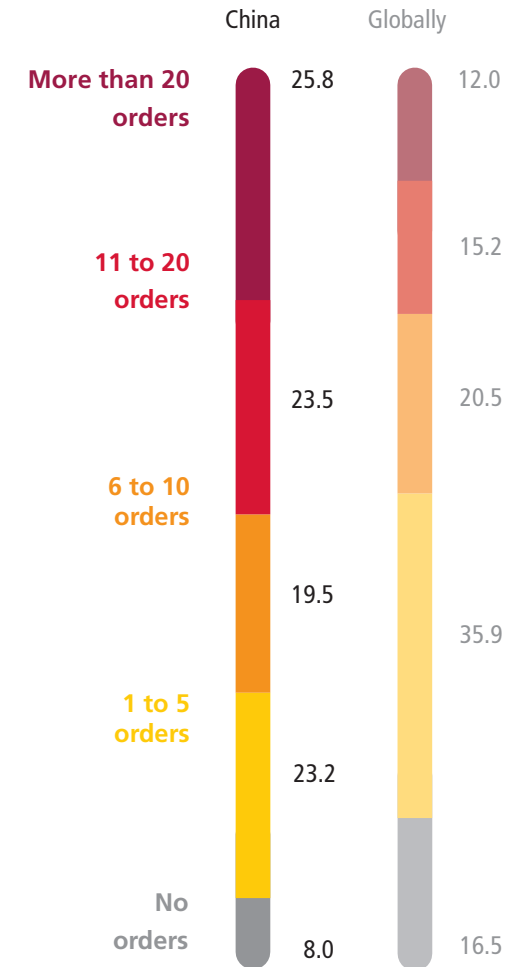
· in % \*  
 ● Yes ● No



# DISTANCE SELLING IN CHINA

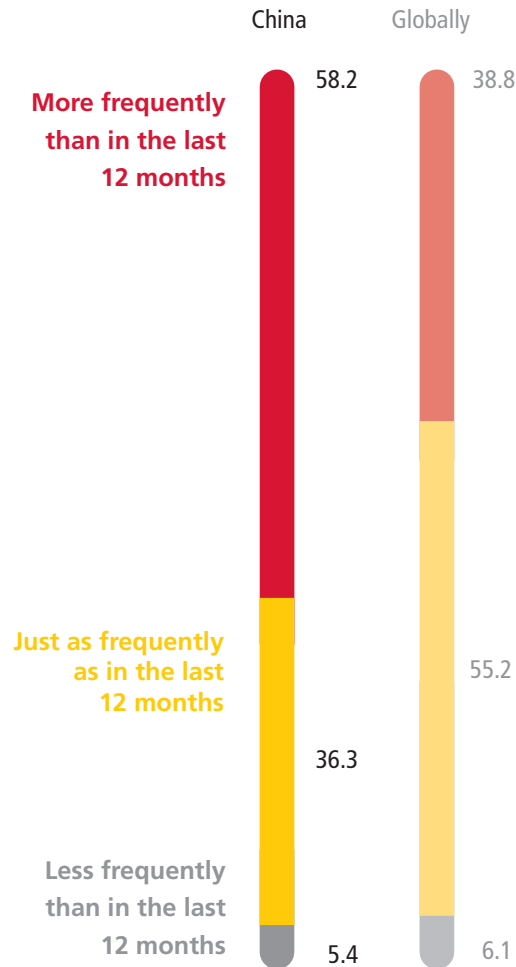
Number of orders in the previous year

· in % \*



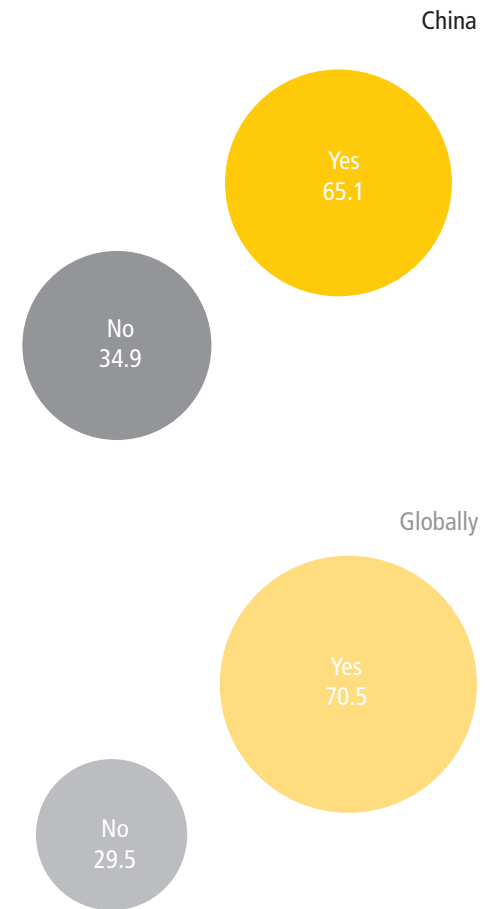
Future ordering behavior (current users)

· in % \*



Non-users of distance selling - future plans

· in % \*



\* Source: DHL Global Mail 2013 · n Global from 1,275 to 11,265 · n China from 63 to 1,040

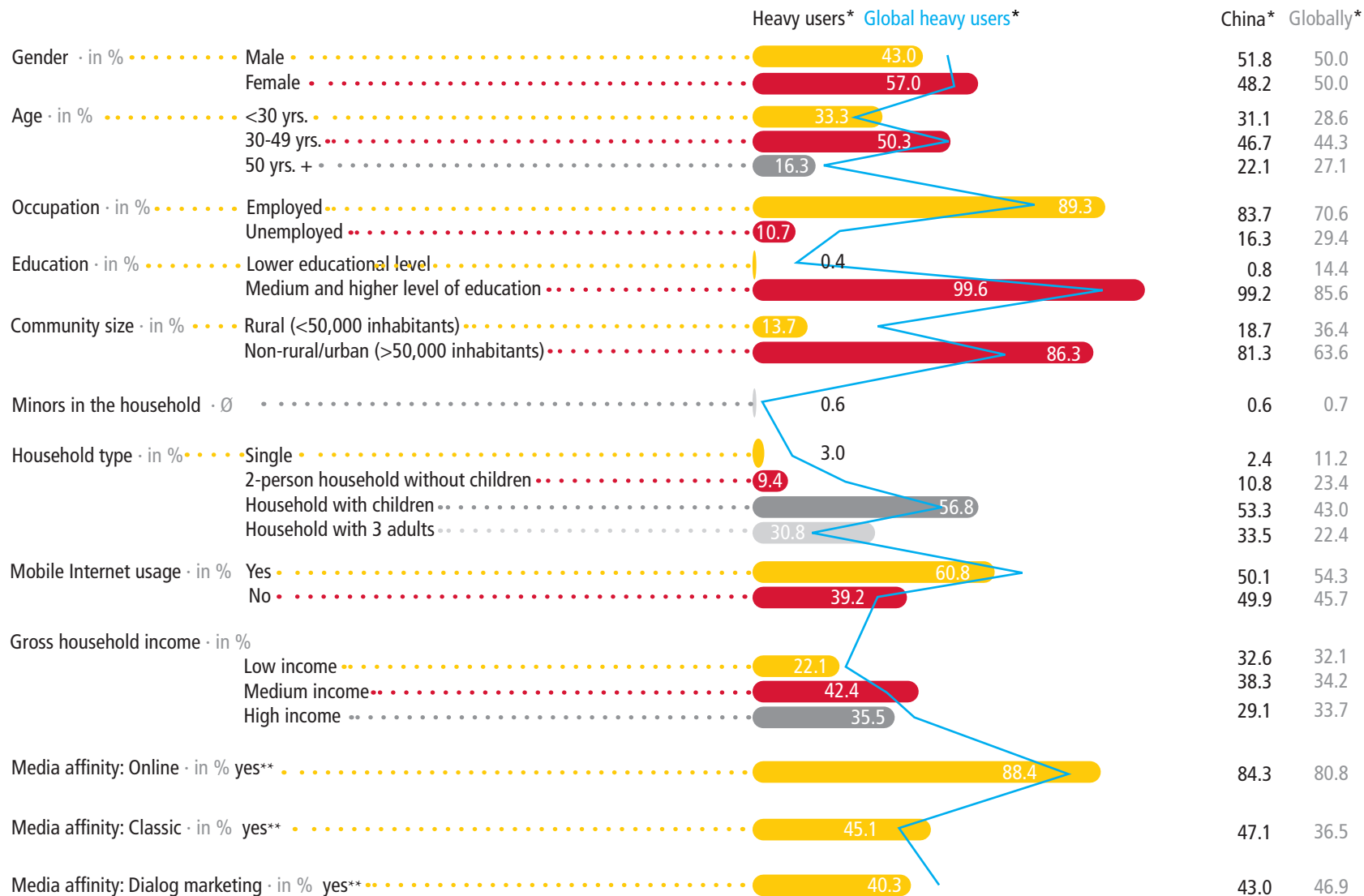


# DISTANCE SELLING IN CHINA \*\*\*

## Particularly heavy users

Online shopping in China is very different from the average behaviour worldwide. This can be seen in the number of heavy users. They are predominantly women (57%), younger, with a higher level of education. Members of this target group live almost exclusively in urban centers due to the enormous conurbations in China.

The household structure is family-oriented. Two further trends are worth noting: The increased use of mobile internet (60.8%) and the strong affinity to classic media (45.1%).

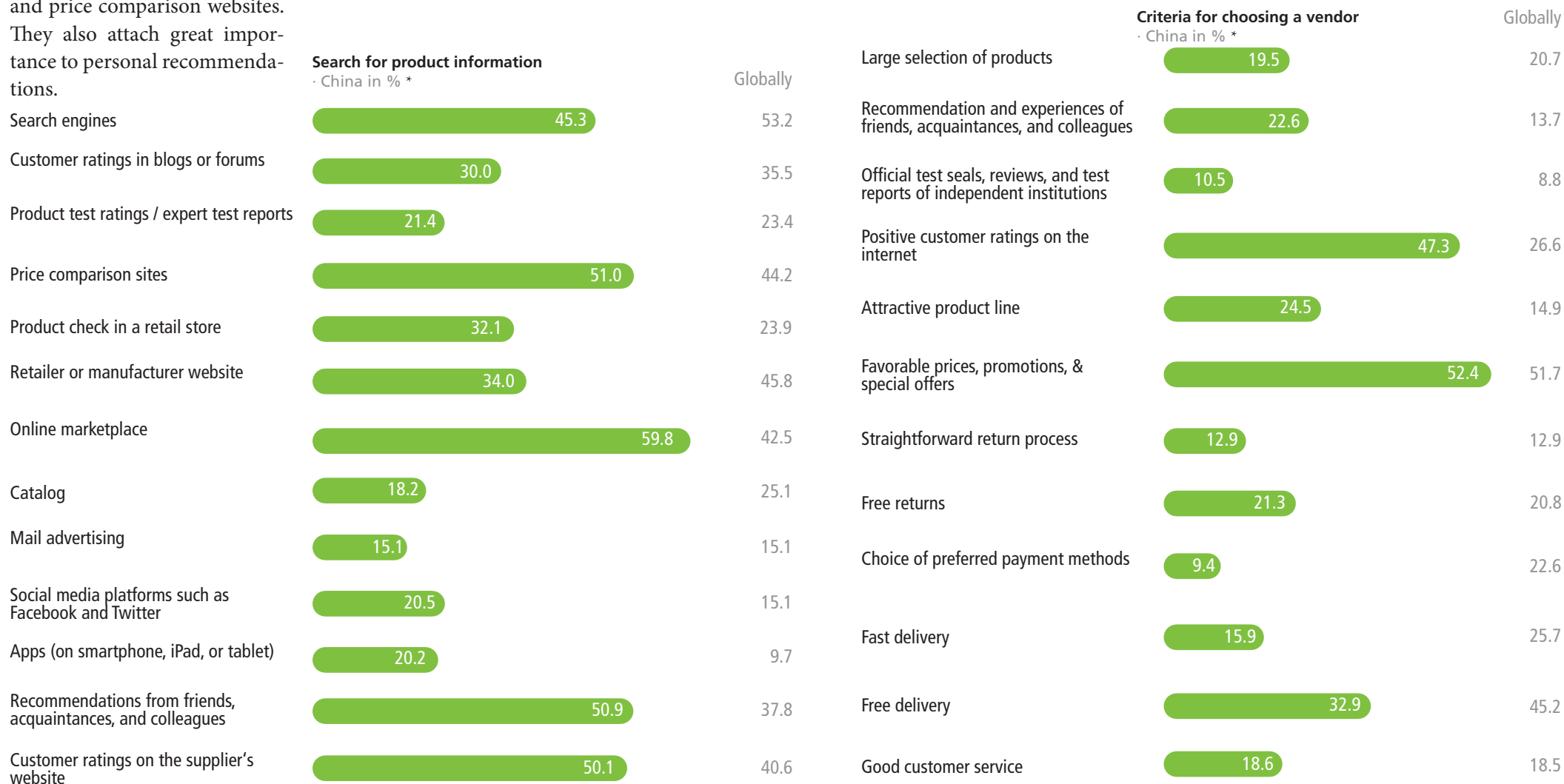


\* Source: DHL Global Mail 2013 · n Global from 2,661 to 11,265 · n China from 248 to 1,040 \*\* media affinity for online / classic / dialog marketing, if at least one medium from the respective area was rated 5 or 6 on a scale of 1 "absolutely not useful" to 6 "very useful" \*\*\* the top third of most active mail order users

**Word of mouth**

Chinese consumers usually search for product information on online marketplaces and price comparison websites. They also attach great importance to personal recommendations.

## "CUSTOMER JOURNEY" – SEARCHING FOR PRODUCT INFORMATION



\* Source: DHL Global Mail 2013 · n Global from 9,386 to 10,617 · n China from 953 to 1,004, multiple mentioning

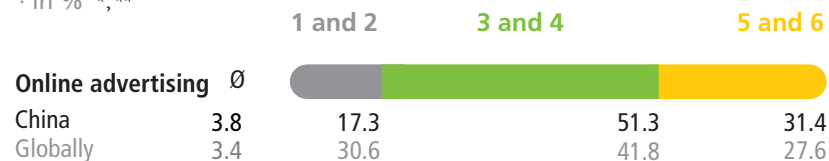
## ACCEPTANCE OF ADVERTISING MEDIA

### Broad acceptance

Compared to the global average, a larger proportion of Chinese consumers found advertising media useful. Users considered online media such as online advertising, social media or even recommendations in online shops most helpful when searching for information.

### Usefulness of advertising media

· in % \*,\*\*



### Social media



### Product suggestions in online shops



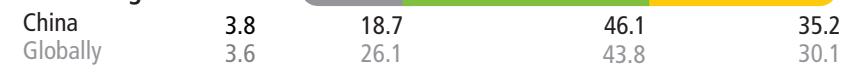
### Internet search engines



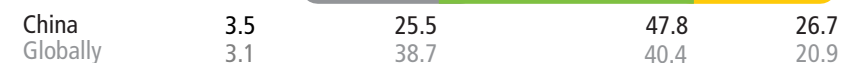
### Price comparison sites



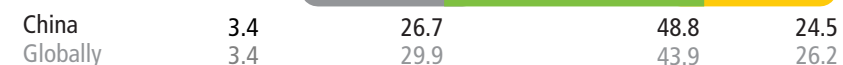
### Television advertising



### Advertising letters



### Household advertising



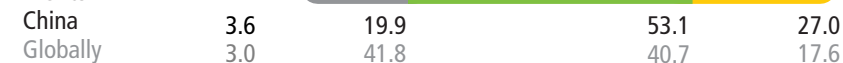
### Advertisements in magazines and periodicals



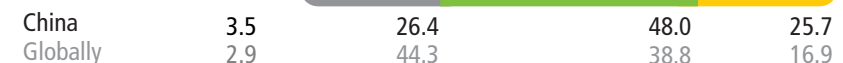
### Advertisements in newspapers



### Billboard advertisements



### Radio



### Catalogs from vendors



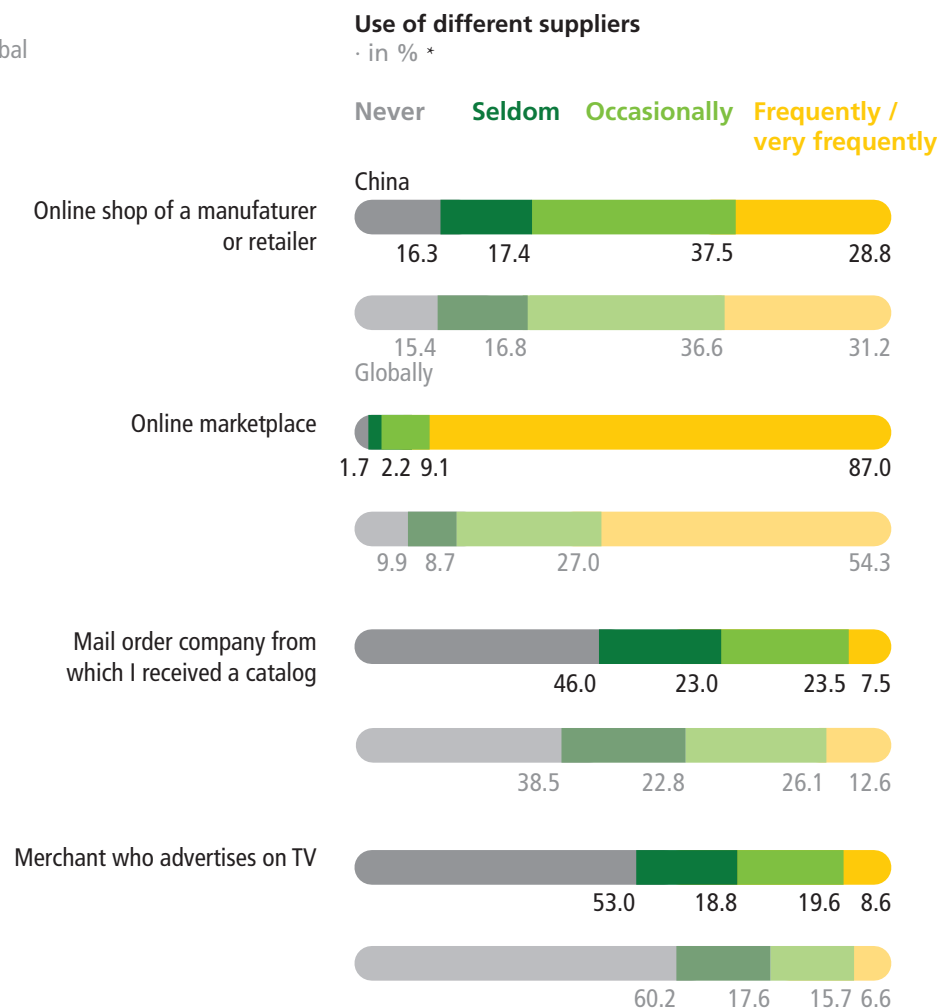
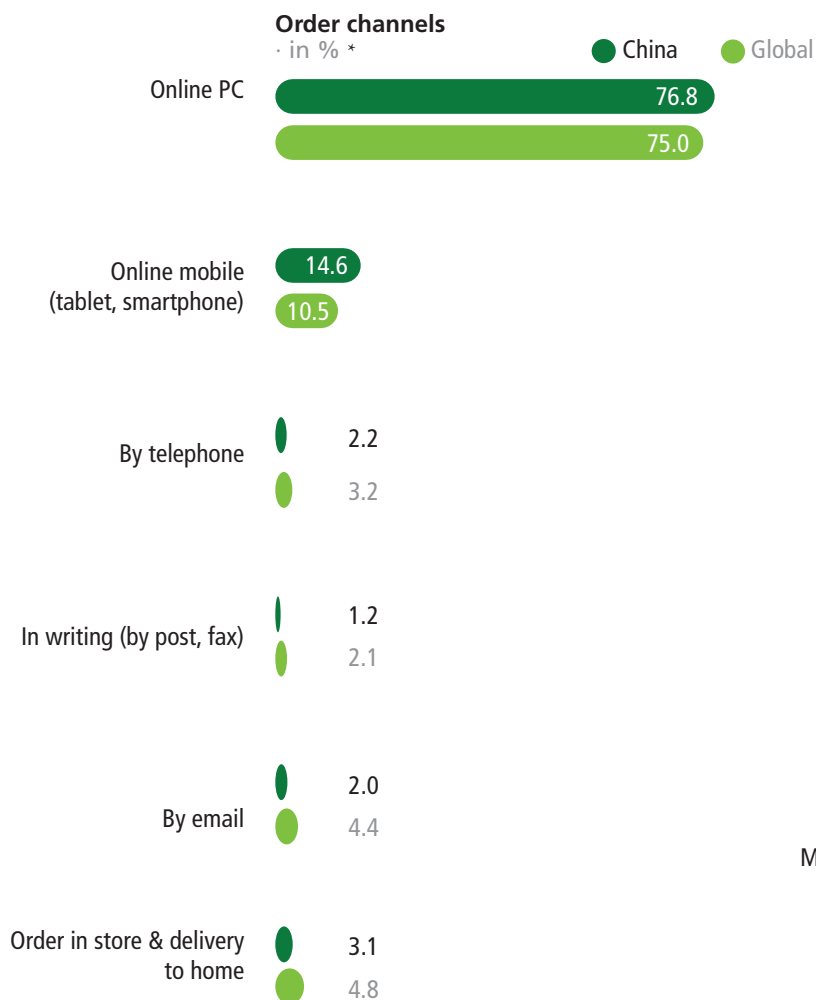
\* Source: DHL Global Mail 2013 · n Global from 10,218 to 10,384 · n China from 979 to 994 \*\* scale from 1 "absolutely not useful" to 6 "very useful"

Welcome to Alibaba

Online shoppers primarily place orders online, whether via PC (76.8%) or mobile devices (14.6%). The ubiquitous eCommerce giant Alibaba dominates the market with its small shopping website. The large majority of providers has a shop there or on one of the smaller online marketplaces – however, independent online shops are less common in China.

Compared to the average world-wide, offline channels are seldom used to place orders, and catalogs are also used far less than the global average. Merchants who advertise their products on TV are slightly more popular in China: only 53% of those surveyed had not recently placed an order via this channel.

# "CUSTOMER JOURNEY" – PLACING ORDERS

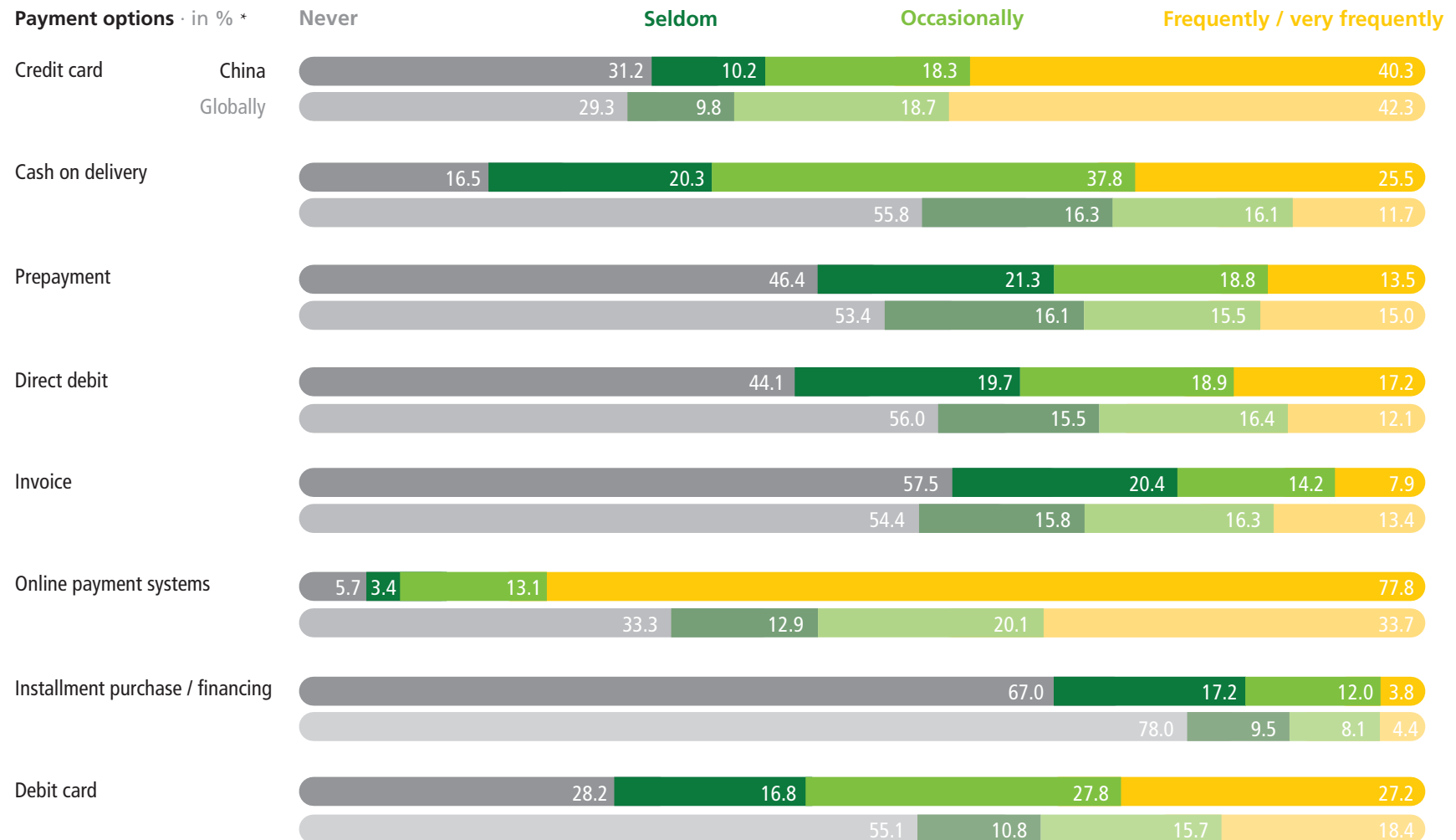


\* Source: DHL Global Mail 2013 · n Global from 9,270 to 9,446 · n China from 943 to 955

### Paying by Alipay

Online payment clearly dominates the Chinese eCom-merce market. At least three quarters of Chinese online shoppers use online payment systems such as the market leader Alipay frequently to very frequently. Nonetheless other methods of payment are still popular. While credit cards are used on a global scale, a high proportion of orders are paid by cash on delivery or by debit card.

## "CUSTOMER JOURNEY" – PAYMENT METHODS



\* Source: DHL Global Mail 2013 · n Global from 9,218 to 9,324 · n China from 923 to 947

## "CUSTOMER JOURNEY" – DELIVERY

Requirements for delivery · Ø \*,\*\*

- China
- Globally

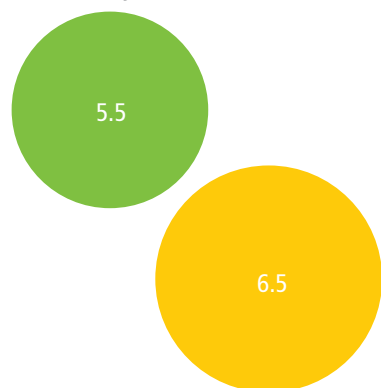
### Long distance, little time

The predominantly urban clients accept delivery times below the global average. They are also used to being able to choose from different delivery companies. Alternative collection points and drop boxes are also very important.

### Max. accepted order time

· Ø in days \*

- China
- Globally



The option of selecting the shipping company

The vendor only works with reliable delivery companies

Detailed information regarding delivery period & delivery date when ordering

Fast delivery

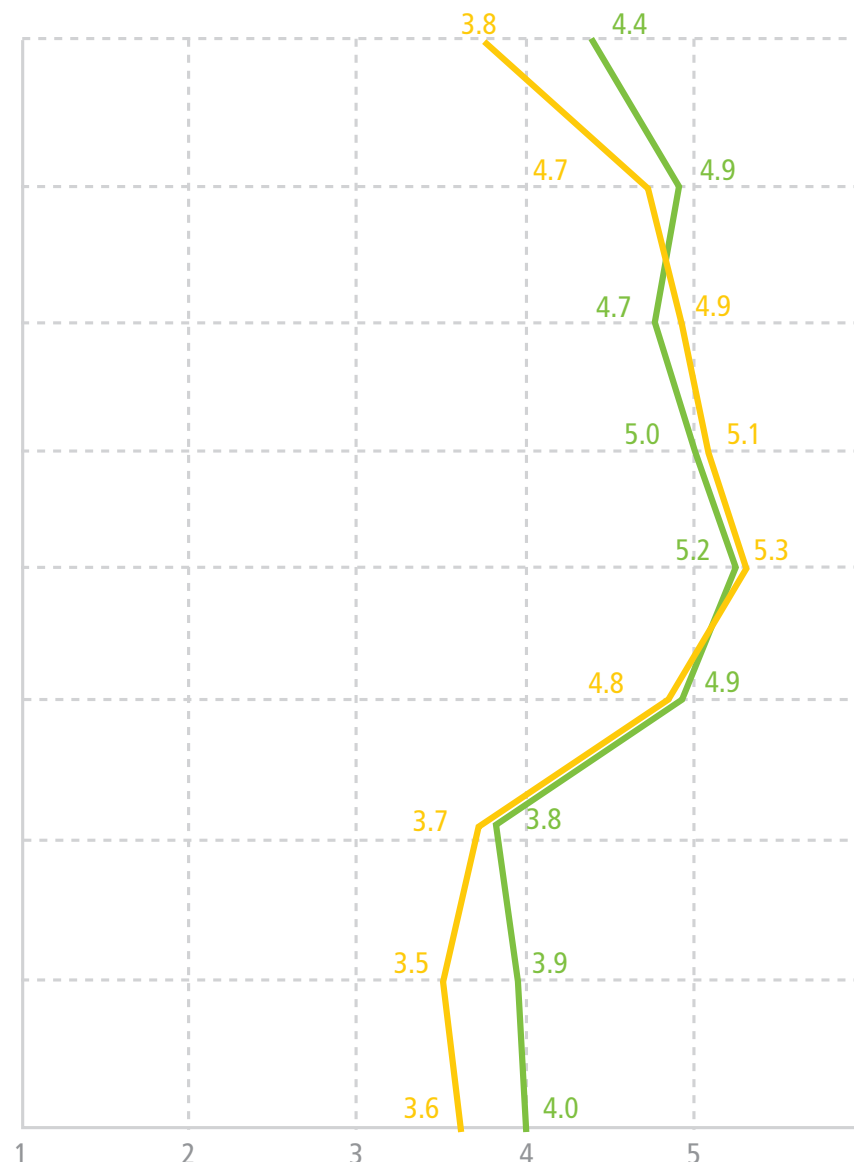
Free delivery

Tracking information

Delivery to a retail store

Delivery to a parcel locker or drop box

Other collection points (supermarket, kiosk, gas station)



\* Source: DHL Global Mail 2013 · n Global from 10,270 to 10,462 · n China from 988 to 995 \*\* scale from 1 "absolutely not important" to 6 "very important"

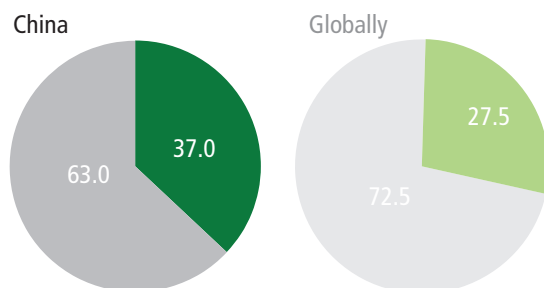
## Returns are rather rare

Even though 37% of those surveyed had already returned goods bought online, the return-rate is well below the international average (4.9%). The Chinese target group usually returns goods when a product is faulty or of insufficient quality. Misleading product descriptions also play a relatively important role. On the other hand, people rarely order multiple variants of the same product to choose from.

## "CUSTOMER JOURNEY" – RETURNS

Percentage of users who returned goods · in % \*

● Yes ● No



Number of returns per capita per year · Ø \*

● China  
● Globally



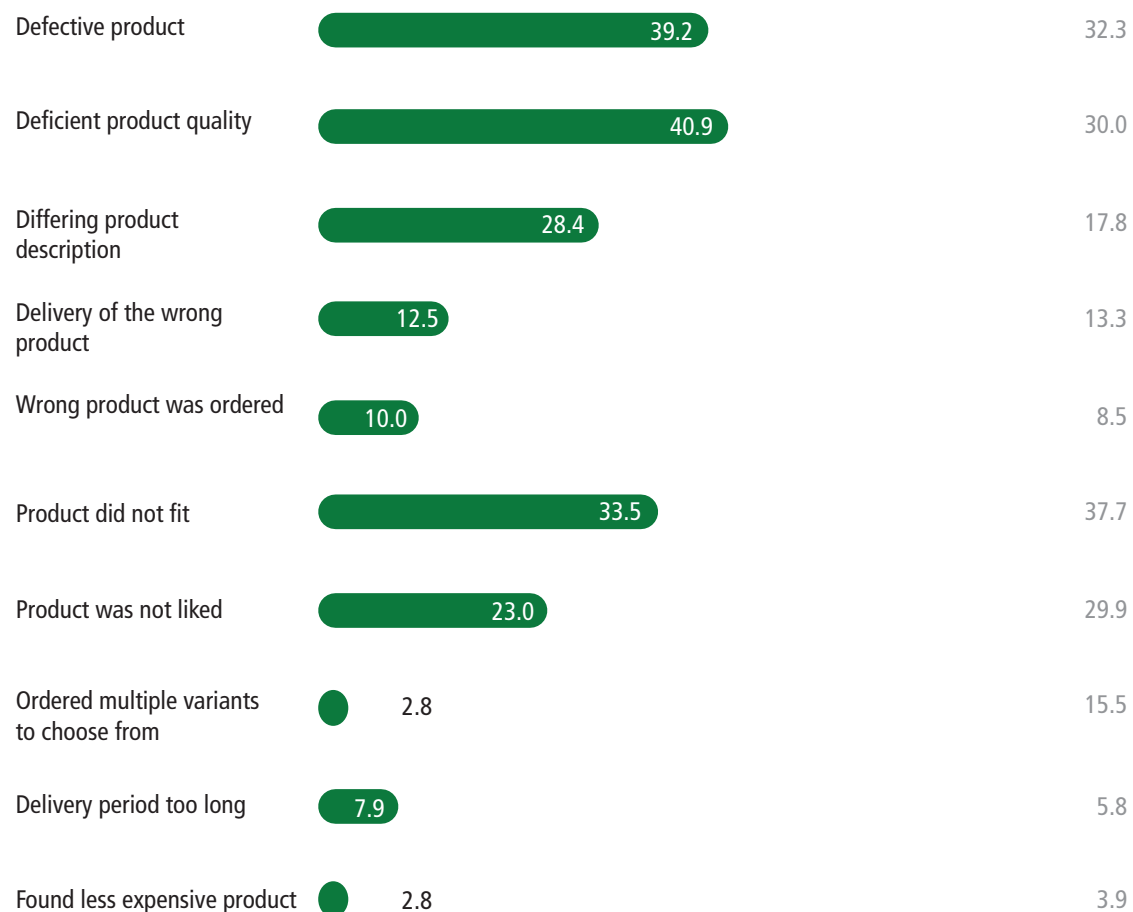
Return rate · in % \*

● China  
● Globally



Reasons for returns

· China in % \*

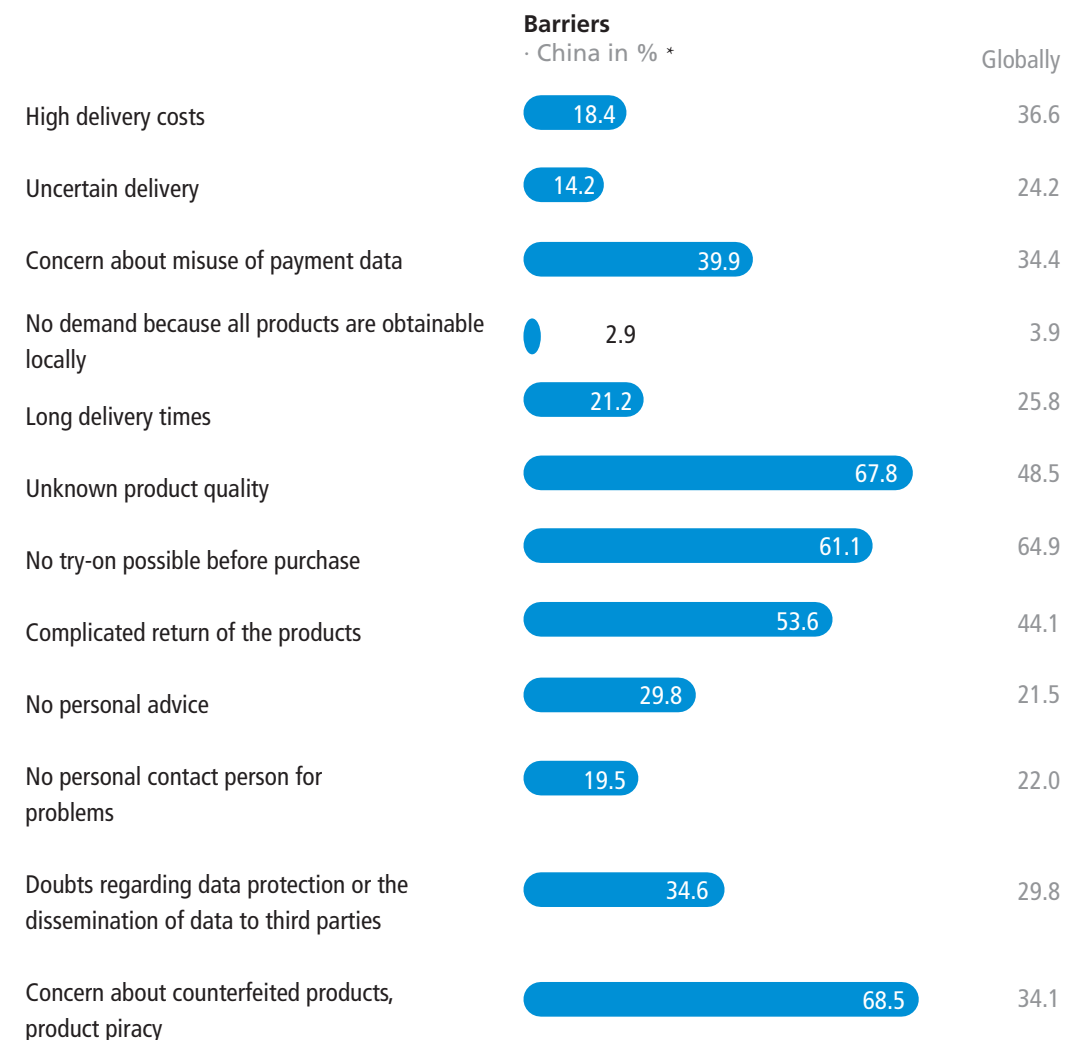
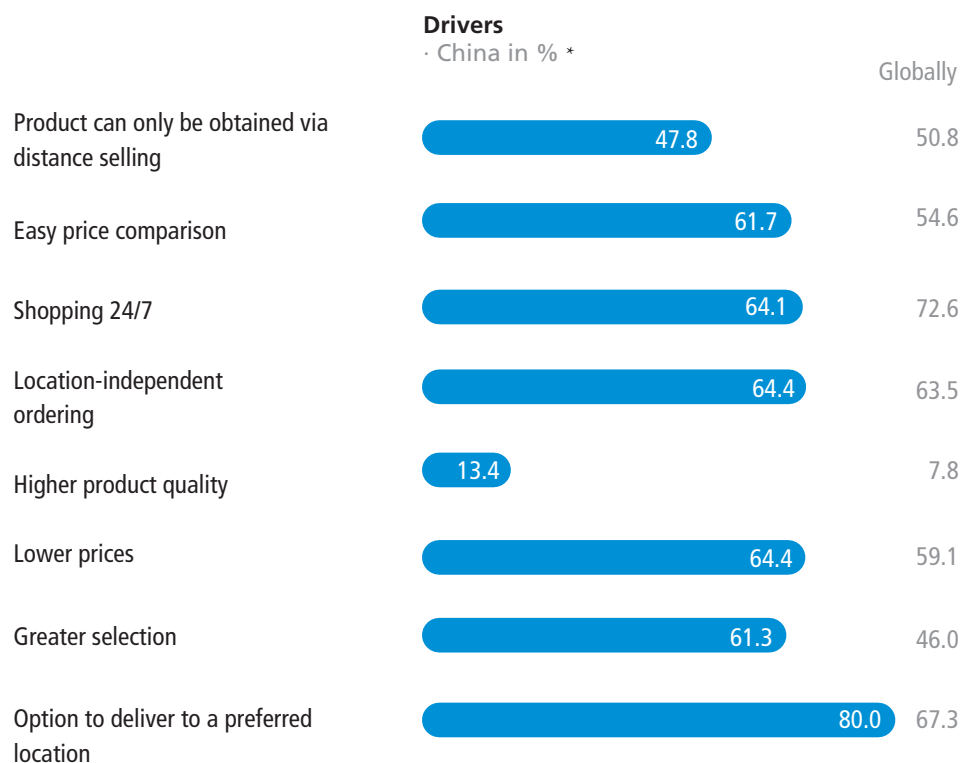


\* Source: DHL Global Mail 2013 · n Global from 2,648 to 9,325 · n China from 352 to 954

### The quality must be right

Aspects of eCommerce that most impress the Chinese include a high degree of price transparency and extensive delivery options. Major barriers: questionable product quality and concerns about product piracy.

## DRIVERS & BARRIERS IN DISTANCE SELLING



\* Source: DHL Global Mail 2013 · n Global from 10,509 to 10,864 · n China from 996 to 1.032



### Potential for imports

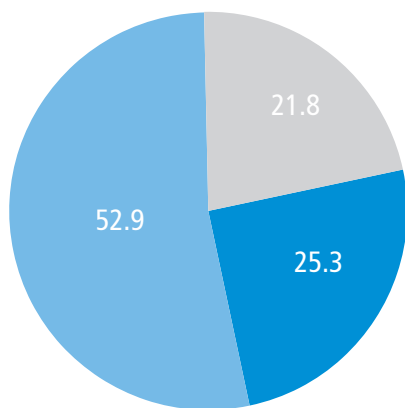
Since China has an enormous domestic market and exporting to China is still not an easy undertaking, Chinese clients rarely take the opportunity of ordering from abroad. However, significant growth can be expected since more than half of those surveyed indicated that they would like to order products from abroad in the future. The US currently benefits from orders received from China and will continue to do so in the future. Closer to home, people order goods from Hong Kong and Japan. In the future, the Chinese target group will also show a greater interest in products from Great Britain and France.

## CROSS-BORDER SHOPPING – OVERVIEW

Use of cross-border eCommerce

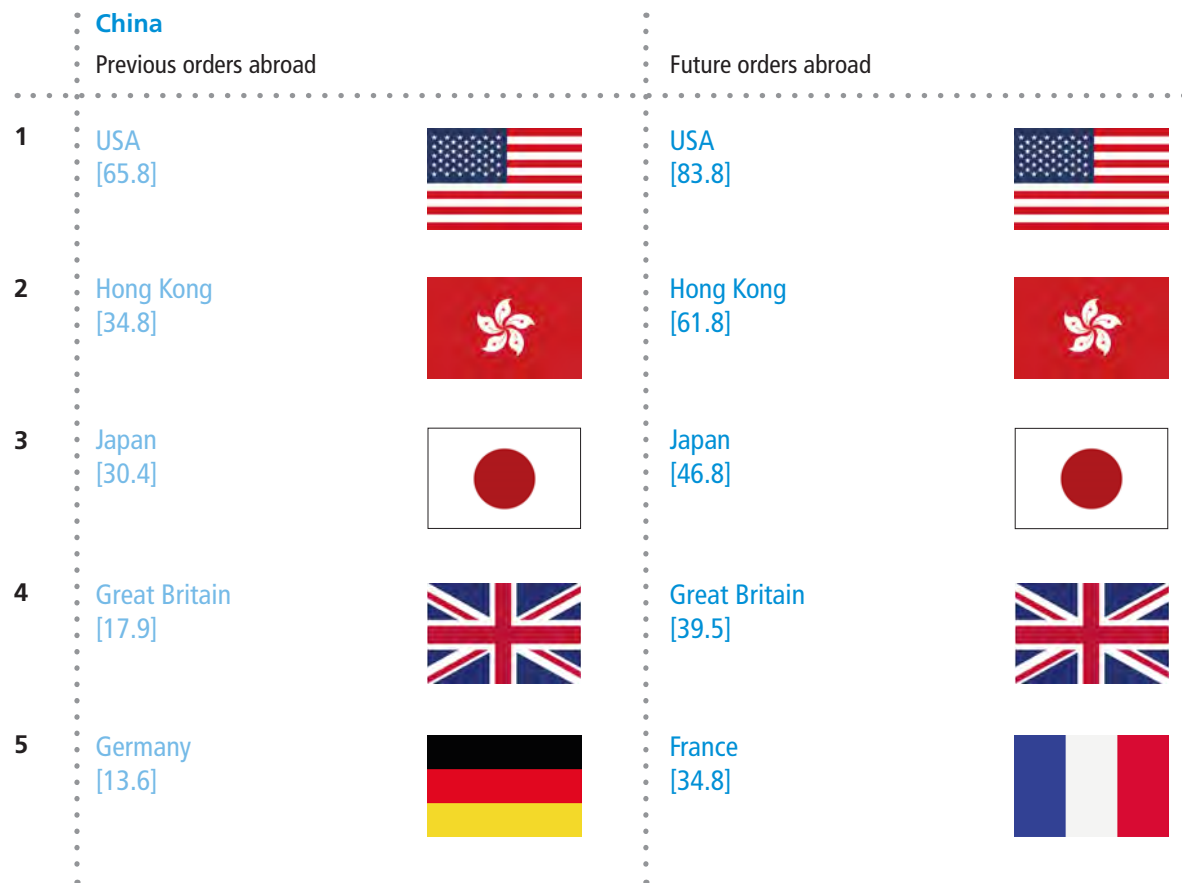
· in % \*

- Yes, already ordered \*\*
- No, but future orders planned
- No, no future orders planned



Previous and future orders abroad by country

· in % \*



\* Source: DHL Global Mail 2013 · n Global from 4,738 to 8,807 · n China from 207 to 799 \*\* split into "further orders planned" 24.8% China and "no further orders planned" 0.5% China

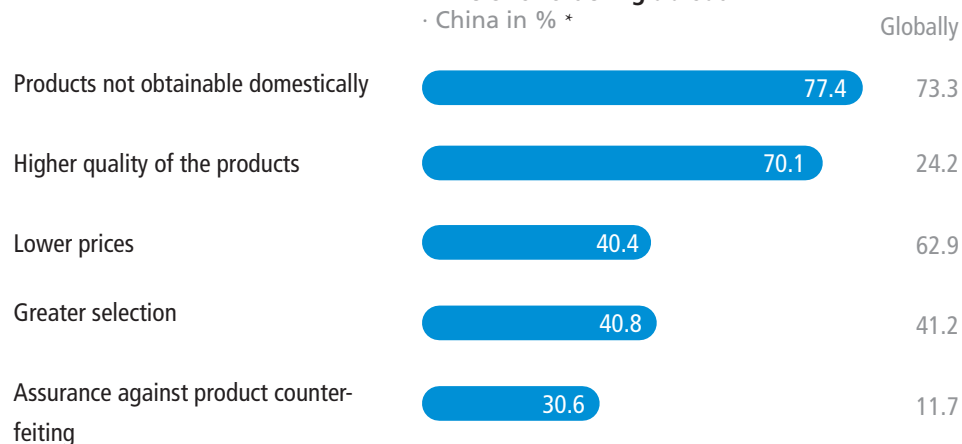
**Drivers of product quality**

Chinese consumers expect that products purchased from abroad are of a higher quality (70.1%). The price is not important for this target group: Lower prices are less important drivers and high delivery costs do not represent a significant deterrent.

# CROSS-BORDER SHOPPING – DRIVERS & BARRIERS

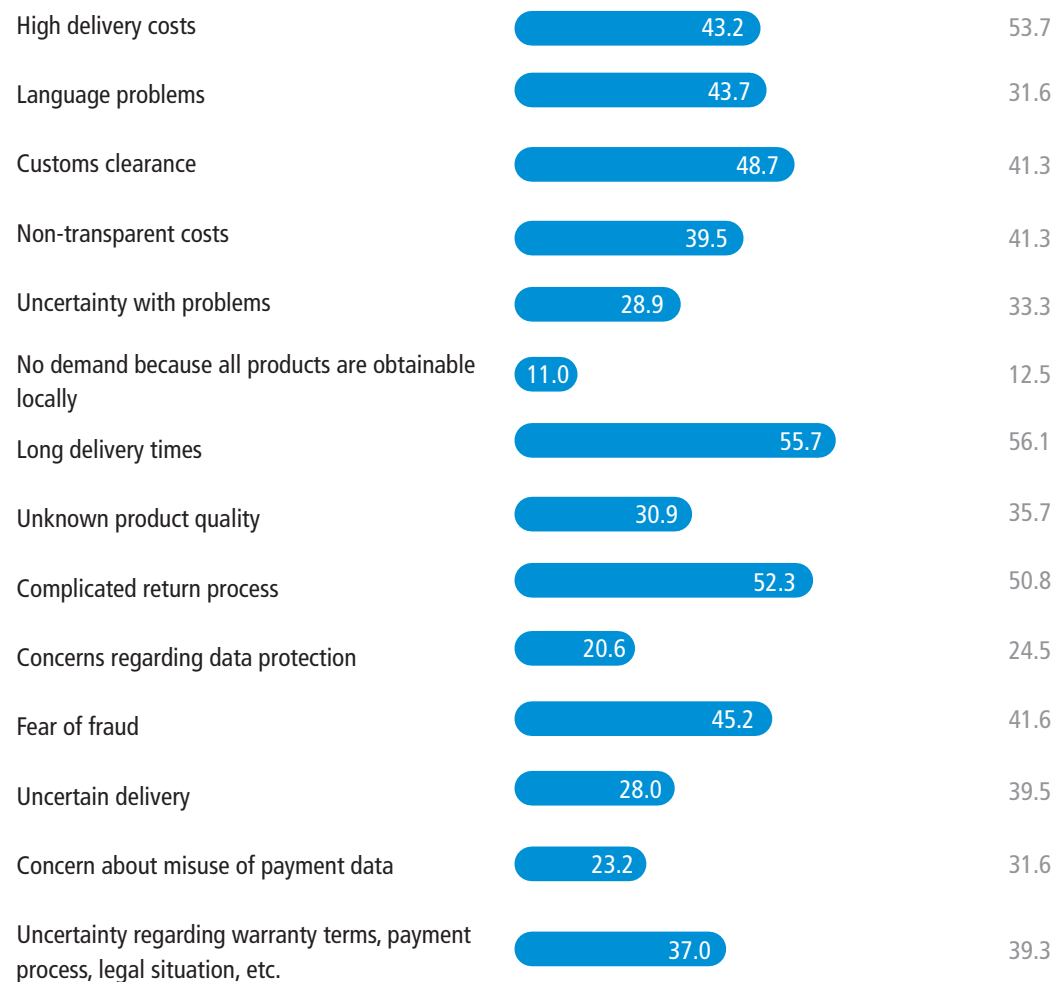
**Drivers for ordering abroad**

· China in % \*

**Barriers to ordering abroad**

· China in % \*

Globally



\* Source: DHL Global Mail 2013 · n Global from 7,289 to 10,689 · n China from 632 to 1,025

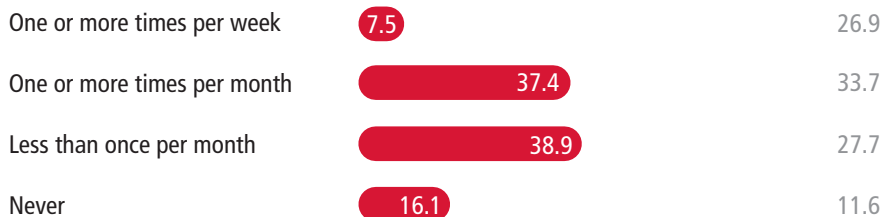
**Fewer mailings**

Chinese consumers receive relatively few mailings and catalogs. Only 7.5% receive offers once a week or more. Almost a fifth never receive such traditional direct marketing. The number of those surveyed who read mailings and catalogs was similar to global figures: More than 40% frequently or almost always read mailings and catalogs. The frequency with which they respond to offers paints a similar picture. Differences in the form of response were identifiable. Online channels such as chat rooms, microblogging and newsletters are used to an increasing extent. However, the most common response channel in China is visiting the provider’s website (77.9%).

# DIALOG MARKETING

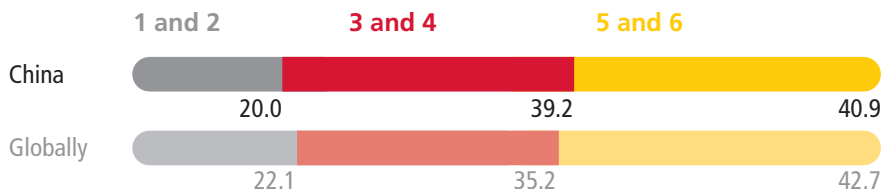
**Receipt of mailings and catalogs**

· China in % \*



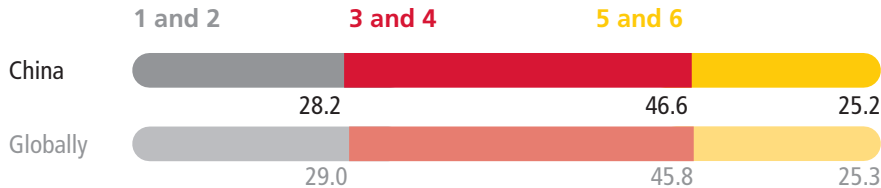
**Reading mailings and catalogs**

· in % \*\*, \*\*



**Response to mailings and catalogs**

· in % \*\*, \*\*



**Response channel for mailings and catalogs**

· China in % \*



\* Source: DHL Global Mail 2013 · n Global from 8,788 to 11,265 · n China from 861 to 1,040 \*\* scale from 1 "never" to 6 "almost always"