



Executive Summary

As the leading global brand in the logistics and international shipping industry, DHL Express has an interest in understanding the challenges businesses face. Helping expand our customer's respective footprints through international trade, while providing resources to help them achieve success, is an integral part of our ongoing mission. One of our most recent efforts to engage our customers was a survey distributed to more than 100,000 U.S. customers directly following the U.S. Presidential Election in November 2016. The survey provides insight on U.S. customers' business priorities for 2017, a business outlook on international trade relations and more. Below are the findings.

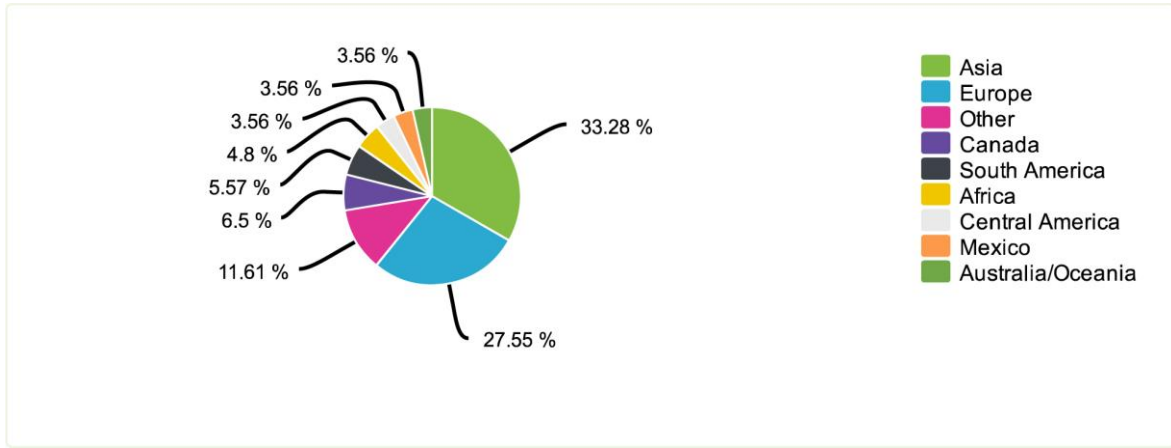
Survey Results

- One-third of DHL customers (33 percent) point to Asia as the region of highest priority for their business in 2017, suggesting that disruption in trade relations with this region could have a significant impact on U.S. companies engaged in international shipping.
- Most DHL customers (57 percent) will target e-commerce in 2017 as the top area from which to drive business sales.
- As the logistics industry continues to leverage technology tools, a significant majority of DHL customers involved in international shipping expressed interest in the introduction of online streamlined customs documentation requirements and procedures.
- Almost 70 percent of DHL customers noted that international shipping sustainability measures are important to them and gave equal priority to cleaner emissions for transport, sustainably sourced and recycled packing materials and the offsetting of greenhouse gas emissions.

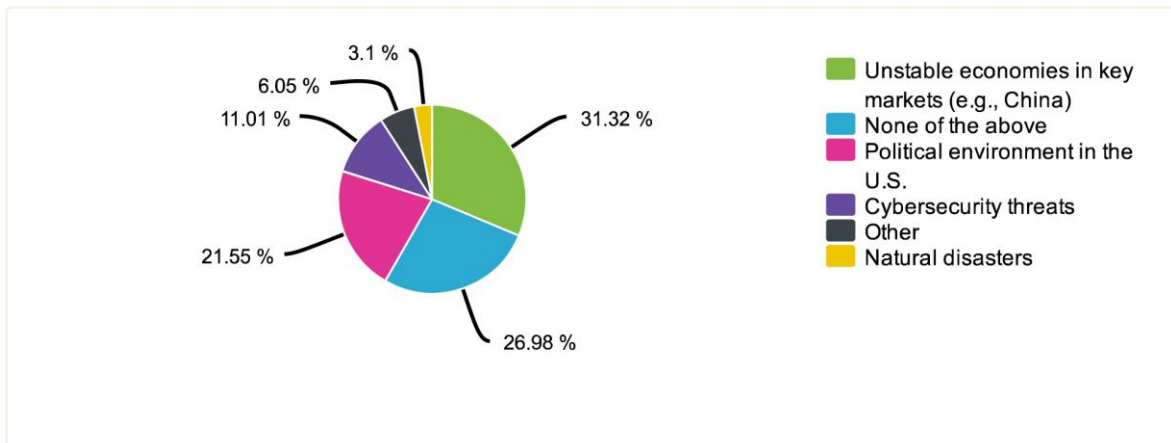
The findings on the need for streamlined customs documentation support the conclusions of a 2016 DHL customer survey in which nearly 50 percent of customers felt that inconsistent customs documentation requirements and confusing trade laws were a major hurdle to trading internationally. DHL is committed to assisting its customers as they begin or continue to expand their businesses beyond U.S. borders and suggest customers follow @DHLUS on Twitter for timely information and updates. The complete survey results can be found at <http://goglobal.dhl-usa.com/go-global/resources-and-downloads>.

Customer Survey Questions

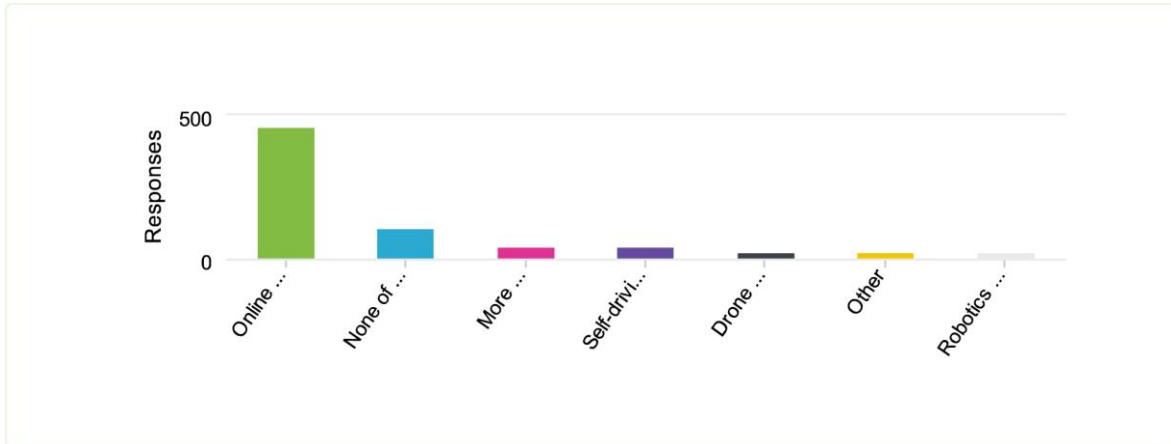
1. Of all global markets, which region of the world is the top priority for your business in 2017?



2. In regard to international trade, what is your company most concerned about as we enter 2017?

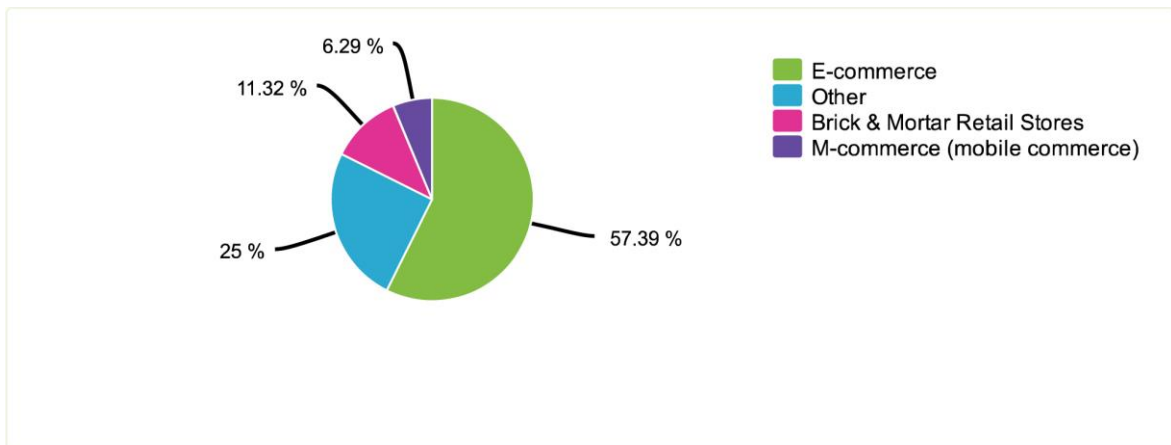


3. Which technology innovations would you like to see more developed for widespread use? (click all that apply)

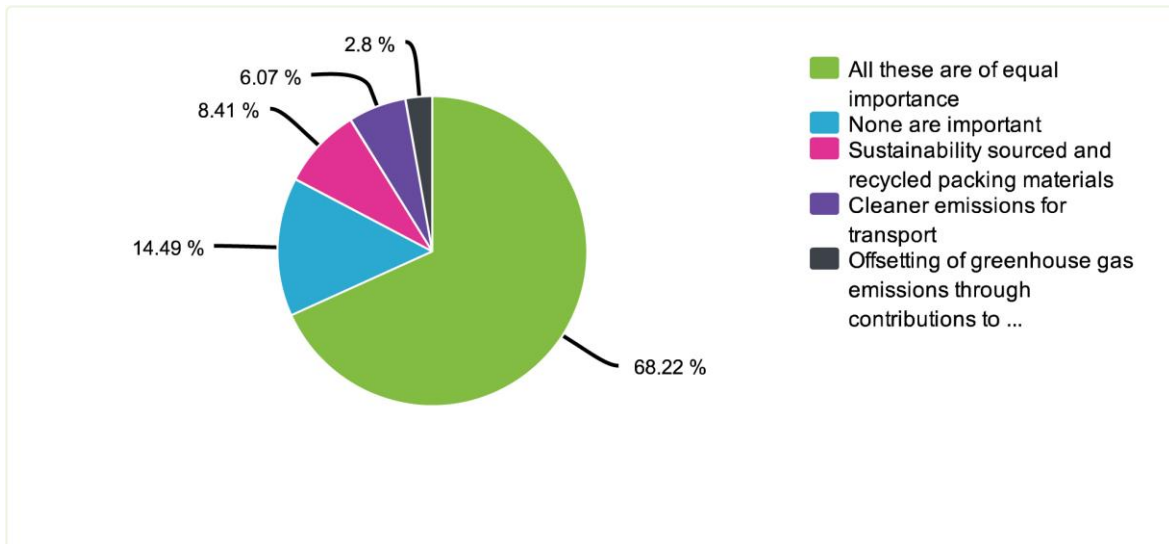


Above graph, left to right: Online streamlined customs documentation requirements and procedures, none of the above, more objects/appliances connected through the internet (IOT), self-driving cars/ delivery vehicles, drone delivery, other, robotics driven by big data technologies

4. What is the top area of focus to drive sales for your business in 2017?



5. Which international shipping sustainability measure is most important to you?



Methodology

DHL surveyed over 100,000 customers via email. The 30-day survey included four key questions on the following: global markets as top priority for businesses in 2017; biggest concerns for international trade in 2017; most important technological innovations; top areas of focus to drive customer sales and sustainability measures most important to customers.

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