

84% of cross-border online shoppers are satisfied with their delivery experience

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IPC Online Shopper Survey looks at cross-border online shopping experiences in 17 countries around the globe.

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- **China is the largest export market for global cross-border online shopping**
- **Free shipping offered to 59% of cross-border online shoppers**

Brussels, 28 January 2016 – Cross-border online shopping keeps on growing. Cross-border online shoppers across the world have their own ways and expectations. When looking into cross-border online shoppers' preferences and experiences, important differences appear between consumers in China and the rest of the world. Key conclusions from the survey include frequency of cross-border online shopping, delivery preferences, origin of goods ordered, categories of goods, delivery cost, tracking and returns.

When looking at the results of this first Online Shopper Survey, Herbert-Michael Zapf, President and CEO of IPC states: "This survey undertaken in 17 global markets provides us with valuable insights to help postal operators understand and meet the evolving needs for cross-border e-Commerce, and will therefore be repeated annually. Cross-border is continuously growing and for this to continue it is important for postal operators to understand consumers' behaviour in order to meet their need for more convenience and

remove remaining obstacles for consumers to embrace cross-border e-Commerce."

Consumer Preferences

Online cross-border shopping frequency varies considerably between China and the global average. While on average, 63% of frequent cross-border online shoppers shop cross-border at least once a month, in China no less than 99% of frequent cross-border online shoppers shop cross-border at least once a month.

A computer is still the preferred device for cross-border online shoppers (77%), but in China 53% of frequent cross-border online shoppers prefer to make purchases on a smartphone or a tablet. When comparing age profiles of frequent cross-border online shoppers, 56% of consumers who prefer to make purchases on a smartphone are between 16 and 34, compared to just 2% of consumers aged over 65.

In rating the importance of different features when shopping online cross-border, reliability was rated the highest, followed by a simple returns process and then the provision of a landed cost calculator at check-out.

The majority of consumers (76%) prefer to have their cross-border parcels delivered to their home address.

Consumer experience

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The majority, (80%) of frequent cross-border online shoppers bought goods from China (29%), the United Kingdom (19%), Germany (14%), the United States (13%) and France (5%). Chinese e-Commerce exports are dominated by the Alibaba Group with 69% of all orders placed on AliExpress or eBay, which sells in China on the Alibaba platform.

On average, clothing, footwear and apparel was the largest category (25%) for cross-border online shoppers, followed by consumer electronics (14%), and books, music and media (11%).

When looking at the value of the goods bought by cross-border online shoppers, the majority (59%) were between €10 and €100 on average. However in China, the average value of goods purchased was considerably higher, with 65% between €101 and €300.

Majority of cross-border shipments enjoy free delivery

59% of frequent cross-border online shoppers were offered free shipping. In EU countries covered in this survey, up to 62% of frequent cross-border online shoppers received free shipping. For 67% of those who received free shipping, it was because the retailer offers free shipping. 16% of respondents were offered free shipping because they ordered goods above a certain value, 15% benefited from a free shipping promotion and 3% were offered free shipping because they were part of a loyalty programme. 27% of frequent online cross-border shoppers paid less than €10 for the shipping.

High degree of satisfaction with delivery experience but still room for improvement

84% of cross-border shoppers were either satisfied or very satisfied with their delivery experience. There was no significant difference between delivery experience satisfaction between postal operators or their competitors.

Key areas for improvement for delivery carriers remain reliability, tracking and

transparency on customs duties and taxes consumers will have to pay when the parcel is delivered. Timely delivery is the most important element to be addressed for cross-border shopping as cross-border shoppers would like to know the specific date their order will be delivered.

Notes:

1 The research was undertaken with 4,075 respondents across 17 countries in 11 languages in September - October 2015. The research was conducted with an online sample of 240 consumers reflective of age and gender for each of the following countries: Austria, Australia, China, France, Germany, Greece, Hungary, Ireland, Iceland, Netherlands, New Zealand, Norway, Portugal, Spain, Switzerland, United Kingdom, and the United States. The survey has a confidence level of 90% and a margin of error of 5.31%. Although a larger number of respondents were initially contacted, only those who had bought goods online cross-border at least once in the past three months have been retained. In the next edition of the survey, the sample size will be increased in order to reduce the error margin.

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About International Post Corporation

International Post Corporation (IPC) is the leading service provider of the global postal industry that provides leadership by driving service quality, interoperability and business-critical intelligence to support posts in defending existing business and expanding into new growth areas. It is a cooperative association of 24 member postal operators in Asia Pacific, Europe and North America. IPC's solutions and services are used by over 180 posts worldwide. Since 1989 IPC has set standards for upgrading quality and service performance and developed technological solutions that help members enhance service for international letters, packets and parcels. IPC engages in industry research, creates business-critical intelligence, provides a range of platforms and programmes for member post CEOs and senior management to exchange best practices and discuss strategy. IPC also manages the system for incentive-based payments between postal operators.

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