International Post Corporation

Two thirds of cross-border online shoppers want recyclable packaging for their purchases

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Brussels, 27 January 2020 â€“ In its fifth edition, the IPC Cross-Border E-commerce Shopper Survey has been further extended to now reach over 35,700 consumers in 41 different countries across North & South America, Asia Pacific and Europe, confirming itself as the largest-ever global consumer survey, focusing on cross-border e-commerce. The countries included in the scope of the survey are: IPC member countries , plus Argentina, Brazil, Chile, China, Estonia, Indonesia, India, Japan, Latvia, Lithuania, Mexico, Poland, Russia, Slovenia, South Korea and Turkey. In 2019, coinciding with recent celebration of the tenth anniversary of the IPC Postal Sector Sustainability programme and the full achievement of the original targets set, there has been a deep dive into the topic of sustainability in cross-border online shopping.

Holger Winklbauer, CEO of IPC said: "Over the five editions of the Cross-Border E-commerce Shopper Survey we have continuously increased the geographical scope and sample. As 25 countries have participated in all five editions of the research, we have been able to report on five-year trends in this year's report. We also explored consumers' views on sustainability when shopping online cross-border. This has highlighted the importance to consumers in providing recyclable packaging and sustainable delivery. This aligns very well with the efforts the postal sector has been making in the field of sustainability and supports the new direction of our sustainability programme through alignment to the wider UN Sustainable Development Goals."

Consumers find sustainable packaging more important than sustainable delivery

Sixty-six percent of consumers surveyed would like packaging of their cross-border online purchase to be recyclable, with 47% strongly agreeing and another 19% agreeing.

They also expressed a strong preference to receive parcels in cardboard as opposed to plastic.

Forty-five percent of cross-border online shoppers would like the delivery process to be carbon-neutral, of which 28% strongly agree, while 47% would be willing to receive their parcel a few days later to reduce the environmental impact.
Participants in the survey were also asked if they had ever paid extra for sustainable packaging when purchasing online. Only 1% had done this before, while 44% said they had never paid extra for sustainable packaging, but were likely to do so in the future. Forty-three percent said that they were unlikely to ever pay extra for sustainable packaging.

Cross-border e-commerce landscape stabilises: dominance of China and large retailers remains, but stabilises

IPC's analysis of respondents' answers shows that of the parcels bought cross-border in 2019, 39% were purchased from China, 14% from the US, 10% from the UK and 9% from Germany. Overall, the most popular e-retailers for cross-border purchases were Amazon (25%), Alibaba (20%), eBay (14%) and Wish (11%). The majority (86%) of cross-border parcels weighed up to 2kg and 44% of goods purchased cross-border cost less than €25.



When looking at the evolution of the main e-commerce exporting countries between 2016 and 2019, it is notable that after China's sharp growth from 2016 to 2018, there is almost no change in 2019. China's share increased by 7% in 2017 and by a slightly more moderate 3% in 2018 and stabilised in 2019. The other four largest countries have also stabilised over the past two years.

…but legislative changes may affect consumer behaviour

Respondents who had made a purchase from China in the past year were asked what they would do if online purchases from China increased by €10 per item. This new question was asked in anticipation of European Union changes to VAT and customs legislation for low-cost items coming from China, and also to reflect possible higher postal delivery costs

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for future Chinese purchases.

Thirty-six percent of these respondents said they would stop buying from China altogether, 41% would buy slightly less from China, and 13% would have no change to their purchase activity.

Based on the 41 markets surveyed, Amazon, Alibaba / AliExpress, eBay and Wish accounted for 70% of the most recent cross-border e-commerce items purchased. Amazon was most common in Luxembourg (69%), Austria (59%), Japan (52%) and Canada (49%) while Alibaba / AliExpress was most popular in Russia (74%), Turkey (64%) and Lithuania (55%). eBay was highest in Australia (45%), Cyprus (43%) and the UK (35%) while Wish was most common in Hungary (29%), Brazil (27%) and Sweden (25%).

Consumer satisfaction
The 2019 survey measured consumer satisfaction with six key elements: delivery cost, delivery location, tracking, delivery speed, customs and returns.

Of these six elements, Delivery speed clearly had the lowest level of consumer satisfaction. This was the case in almost all 41 surveyed markets. The most common delivery speed for cross-border purchases was 15-29 days (20%), with 11% of respondents having to wait 30 days or more for their purchase to arrive. This could be explained by the high percentage of light-weight, low-value purchases coming from China.

To download the key findings from the research go to www.ipc.be/shopper

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Notes to editor:

Scope of the research: The IPC cross-border shopper survey took place in 41 countries: Argentina, Austria*, Australia*, Belgium*, Brazil, Canada*, Chile, China*, Croatia, Cyprus, Denmark*, Estonia, Finland*, France*, Germany*, Greece*, Hungary*, Iceland*, Indonesia, Ireland*, India, Italy*, Japan, Latvia, Lithuania, Luxembourg*, Mexico, the Netherlands*, New Zealand*, Norway*, Poland, Portugal*, Russia, Slovenia*, South Korea, Spain*, Sweden*, Switzerland*, Turkey, the United Kingdom* and the United States*.
* indicates the 25 countries included in the four-year trend analysis
Target group: Frequent cross-border online shoppers, who have bought physical goods online at least once in the last three months and have made a cross-border online purchase in the past year. The target group was determined by quotas based on the age and gender profile of the online popular per country.
Methodology: Quantitative research using online access panels supplied by Dynata. Fieldwork took place from 16 to 30 September 2019.
Sample size: 35,737 completed responses for all the markets. The sample size was 500 or 1000 respondents for 38 of the 41 survey countries (a smaller sample size was used in Luxembourg, Cyprus and Iceland).

About International Post Corporation

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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 25 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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