International Post Corporation

IPC survey shows impact Brexit and EU customs changes have made on cross-border shopping habits

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Brussels, 20 January 2022 â€“ The 2021 edition of the IPC Cross-Border E-Commerce Shopper Survey has been released today, giving an overview of online cross-border consumersâ€™ expectations and habits. The survey was conducted with 33,000 participants in 40 countries worldwide, accounting for 93% of the world e-commerce market. Alongside looking at the impact of new legislation, the survey monitored current and future e-commerce trends and sustainability preferences.



IPC's CEO, Holger Winklbauer said: "The IPC Cross-Border E-Commerce Shopper Survey continues to provide invaluable insights for the postal industry and remains the one of the largest of its kind. This edition has shown for the first time the impact of both Brexit and EU tax changes on consumer shopping habits. E-commerce has long cemented itself as the backbone of the postal industry, therefore it is vital the posts are able to understand and adapt to the ever-growing needs and concerns of its customers."

Brexit and new EU legislation: both China and the UK lose ground as top online shopping hubs

The survey analysed how consumers were affected by both the UK leaving the European Union and the introduction of customs fees and removal of VAT exemption for low-value items coming into the EU. Thirty-nine percent of respondents stated the new VAT rules have impacted their cross-border purchases, with over half stating that the value of items purchased has increased and/or that they

have now pay additional custom fees compared to previous years.

Overall, the introduction of the new laws has seen a significant increase in the number of people who have had to pay e-commerce related fees, with 21% having paid import fees for purchases this year compared to 13% in 2020.
Since the increase in customs and import fees, the report has shown that China has dropped three or more percentage points from 17 of the 40 countries surveyed as the most recent country of purchase and within Europe, the UK dropped as the country of most recent purchase in five countries.

Consumers continue lockdown shopping behaviours
The survey revealed that consumers have continued to shop regularly online, with 22% of consumers shopping online at least once a week. The number has remained the same after a spike in the number of people turning to online shopping rose due to COVID-19 lockdowns.

Overall, 79% of consumers tended to shop online once a month, continuing the trend of e-commerce becoming the preferred way to shop. However, although more are choosing to shop online, it has been predicted that many will choose to shop online from domestic e-retailers rather than cross-border e-retailers in the future, with 27% of respondents stating they will buy much more domestically.

Consumers are happy with deliveries, however more are returning cross-border purchases
Participants of the survey were asked how long their purchase took to arrive, and the most common answer was 2-3 days (17%), with 4-5 days coming in second with 16% of participants. Delivery speed improved in 2021 compared to 2020, as delivery providers recovered from the Pandemic's impact on international logistics.

Almost half (46%) of the respondents stated that they were either "extremely or very satisfied" with the speed at which their package was delivered. However, the survey showed that more than half of consumers were "very or extremely satisfied" with all other aspects of the delivery process (delivery location, delivery cost, returns, customs, parcel tracking and delivery speed). The returning of e-commerce shopping items rose to 14% this year, with consumers from the US (27%), Australia (25%) and the UK (24%) returning the most. Looking at the 25 trend countries, the proportion returning their entire purchase increased from 5% in 2020 to 9% in 2021, while those returning part of their purchase increased from 4% in 2020 to 6% in 2021.

Amazon, AliExpress and eBay continue to be e-commerce champions

Online shoppers worldwide continued to use e-commerce giants Amazon, AliExpress and eBay to make most of their online purchases,

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with Amazon accounting for 26%, AliExpress 19% and eBay 10%. Between 2019 and 2021, both Wish and eBay lost significant cross-border market share, while Amazon increased in several countries. Chinese clothing e-retailer Shein has also increased significantly from 0% in 2019 to 3% in 2021.

Amazon was most popular in Luxembourg (59%), Austria (54%) and India (51%). AliExpress was most popular in Russia (74%), Lithuania (51%) and Poland (43%). eBay was highest in Australia (33%), the UK (28%) and Croatia (24%).

Consumers continue to push for sustainable shopping options

As the zeitgeist changes, consumers continue to show interest in ensuring that online shopping becomes a sustainable option for the future. Forty-nine percent of participants stated that they would prefer their cross-border parcels to be carbon-neutral and 44% claim to have changed their online shopping behaviours due to sustainability concerns. Consumers have also expressed concerns about how sustainable the packaging of their online purchases was, with 70% stating that they would like their packaging materials to be recyclable, 65% wanting their packaging to be reusable and 50% wanting their packaging to be biodegradable.

More than half (55%) stated that they would like e-retailers to provide clear information about how to recycle their packaging when shopping online.

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

Notes to editor:

Scope of the research: The IPC Cross-Border

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Shopper Survey 2021 took place in 40 countries: Argentina, Austria, Australia, Belgium, 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, Peru, Poland, Portugal, Russia, Slovenia, South Africa, Spain, Sweden, Switzerland, the United Kingdom and the United States.
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 population per country.
Methodology: Quantitative research using online access panels supplied by Dynata. Fieldwork took place in October 2021.
Sample size: 33,179 completed responses for all the markets. The sample size was between 100 and 1,000 respondents per country.

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 25 member postal operators in Asia Pacific, Europe and North America. IPC's solutions and services are used by over 190 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. Throughout the COVID-19 crisis, IPC has positioned itself as a crucial coordination platform between posts worldwide and put in place operational solutions to ensure the continuity of cross-border mail flows.

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