

Physical advertising helps drive the global growth in online sales

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• The first IPC and GEA Advertising & e-commerce survey, based on 3,000 responses from consumers in Germany, Japan and the USA • German shoppers buy higher value goods • Three-quarters of US consumers made an online purchase as a direct result of advertising mail in the past year • Two-thirds of Japanese consumers had received an advertising letter from an e-retailer in the past year)

In the first edition of the advertising and e-commerce survey, IPC and GEA (the Global Envelope Association) have collaborated to conduct research into consumers' attitude towards advertising mail and the effectiveness of the medium. The survey reached over 3,000 respondents in Germany, Japan and the United States, and was carried out in July 2018.

The rise of digital adblockers shows the value of physical mail

The majority of survey respondents received advertising mail at least once per week. This is a key advertising channel, with 83% in Germany, 76% in the USA and 75% in Japan checking their letterbox at least once a day. Unaddressed advertising mail is blocked by 35% in Germany, 33% in Japan and 25% in the USA. This is most commonly via a sticker on their letterbox in Germany and Japan, and by signing up to a "do not mail" list in the USA.

A digital adblocker to block online advertising is already used by 38% in Germany, 31% in the USA and 25% in Japan. A significant proportion of consumers in all three countries expect to install an adblocker in the coming year, which reflects consumer frustration with this advertising channel.

Direct mail from e-retailers helps drive e-commerce growth

E-commerce continues to grow worldwide, and a key method where direct mail can support e-commerce is in delivering discount codes for online purchases. In all three countries surveyed, the majority of consumers look for discount codes before making online purchases.

E-retailers use advertising mail. Almost two-thirds (65%) of Japanese respondents, 59% of Americans and 48% of Germans had received at least one advertising letter from an e-retailer in the past year. Advertising catalogue from e-retailers were also common, being received in the past year by 60% of respondents in the USA, 53% in Germany and 35% in Japan. E-retailers making the most use of advertising letters and catalogues included the largest players, such as Otto, Amazon and Rakuten.

This usage of advertising mail delivers results for e-retailers. When asked how many online purchases they had made as a result of receiving advertising mail in the past year, 76% of Americans, 62% of Germans and 55% of Japanese respondents had made at least one purchase. The number of additional online purchases made as a direct result of advertising mail was 7.1 in the USA, 3.7 in

Germany and 2.7 in Japan.

Packaging & Sustainability

Sustainable packaging was important in all three countries. Over two-thirds (68%) of German consumers said that they were willing to pay an extra €0.10 for sustainable packaging for their online purchases, compared to 61% in the USA and 39% in Japan.

When considering their most recent online purchase, the most common packaging type for all three countries was a cardboard box, being used for 66% of purchases in Germany, 51% in the USA and 40% in Japan. However, large format envelopes ranked second, with 16% in Japan and 15% in the USA and 10% in Germany.

To download the key findings from the research go to https://www.ipc.be/sector-data/direct-marketing/research-analysis/dm_e-commerce

Note to editor:

Scope of the research: The IPC-GEA Advertising & E-commerce survey took place in three countries: Germany, Japan and the USA

Target group: Frequent online shoppers, who have bought physical goods online (excluding grocery) at least once in the last three months and who receive printed advertising in their letterbox at least once per month.

Methodology: Quantitative research using online access panels supplied by Survey Sampling International (SSI). Fieldwork took place in July 2018

Sample size: 3,067 completed responses for all the markets. The sample size per country was 1014 in Germany, 1053 in Japan, and

1000 in the USA).

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 23 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.

About Global Envelope Association

The Global Envelope Alliance (GEA) was created to develop a forum for the global community of envelope manufacturers, suppliers, posts, courier companies and market intermediaries to use in gathering more information about global trends and working together in a global community to promote a stronger industry worldwide.

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