International Post Corporation

IPC Cross-Border E-Commerce Shopper Survey shows more positive mindset among online consumers in 2023

11-01-2024

â€¢ 30% of consumers shopped more online in 2023 than in 2022. â€¢ Online purchases from China are on the rise again, driven by Shein and Temu

Brussels, 11 January 2024 – The 2023 edition of the IPC Cross-Border E-Commerce Shopper Survey has been released today, providing a comprehensive overview of online cross-border consumers' expectations and habits. Conducted with 32,510 participants from 41 countries worldwide, this year's survey shows among others that consumers are more likely to increase their online spending than one year ago, despite the higher cost of living.

IPC's CEO, Holger Winklbauer said: "*The 2023 Cross-Border E-commerce Shopper Survey shows that consumers have increased confidence, despite the overall economic uncertainty and increased cost-of-living, so online shopping should continue to grow, even if not at the same pace as during the pandemic peak*."

One third of consumers have increased their online shopping in 2023, as a response to the increased cost of living

As the world is challenged by increased costs of living, 30% of consumers shopped online more in 2023 than in the same period in 2022. Forty-two percent of consumers said that their e-commerce activities did not change in 2023. Twenty-five percent shopped less online.

In the context of the e-commerce slowdown in 2023, IPC measured consumer attitudes towards the current economic and 'cost of living situation'. Forty-four percent strongly

agreed that "Free delivery will become more important" (2pp. increase vs. 2022), which shows that consumers are more and more likely to look for specific offers and/or retailers which provide free delivery. Only 18% of respondents strongly agreed that "I expect to decrease my spending generally and that will affect my online shopping as well" (3pp. decrease vs. 2022), demonstrating an increased optimism among online shoppers.

Chinese e-retailer Temu enters the e-retailers' top 4

Twenty-four percent of the most recent cross-border purchases were made on Amazon (down by 3pp. vs 2022), with AliExpress (16%, down 1pp. vs 2022) in second place, Shein (9%, up 3pp. vs 2022) in third place, and Temu (7% vs. 0% in 2022) being the fourth most used e-retailer for cross-border e-commerce in 2023.

When looking at the 24 trend countries that have been in every survey since 2016, China's share has increased by 7pp. in 2023 after decreasing from 2019 to 2022. The increase of purchases from China is primarily driven by the two e-retailers - Shein and Temu.

Online shoppers open to reusable packaging

In view of the changing legislation requiring e-retailers to offer reusable packaging as part of the packaging they use by 2030, IPC asked cross-border shoppers about their likelihood of using such packaging. Asked how often they would use reusable e-commerce packaging if they had an option to, consumers seemed generally open to this idea. However, it depended on the way the packaging was to be returned – the highest likelihood of being taken up was if the packaging was picked up from their doorstep (when 73% would use it always or often).

If the packaging had to be returned to the nearest carrier point, the willingness to use it dropped. Interestingly, there was no difference between return to post office and return to parcel locker/street drop-off box. For these packaging drop-off options, around half said they would always or often use it, but around one in four said they would never or only sporadically use it.

Delivery location receive the highest

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satisfaction rating among online shoppers while customs the least.

Satisfaction was highest for the delivery location (71% extremely / very satisfied) and lowest for customs (42%).

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

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Notes to editor:

Scope of the research: The field work took place in September 2023 in 41 countries: Australia, Austria, Belgium, Brazil, Canada, Chile, China, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Indonesia, Ireland, Italy, Japan, Latvia, Lithuania, Luxembourg, Malaysia, Mexico, Netherlands, New Zealand, Norway, Peru, Poland, Portugal, Romania, Slovakia, South Korea, Spain, Sweden, Switzerland, the UK and the USA.

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 September 2023.

Sample size: 32,510 completed responses for all the markets. The sample size was between 100 and 1,000 respondents per country.

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