

Posts account for over two thirds of cross-border parcel deliveries

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In the third edition of the cross-border e-commerce shopper survey, IPC has continued its research into consumer expectations and experiences when shopping cross-border.

- **Alibaba, Amazon and eBay account for 56% of cross-border purchases made**
- **China (34%) remains principal market for e-shoppers to purchase from**

 **IPC Cross-border e-commerce shopper survey 2017**

Brussels, 31 January 2018 – In the third edition of the cross-border e-commerce shopper survey, IPC has continued its research into consumer expectations and experiences when shopping cross-border. The survey's reach has been extended to almost 29,000 respondents in 31 countries across North & South America, Asia Pacific and Europe, including Brazil, Cyprus, India, Korea, Mexico and Russia.

Holger Winklbauer, CEO of IPC said: “The continued increase of the geographical scope and sample of our cross-border e-commerce shopper survey helps us to gain further insights into the expectations and experiences of consumers shopping online around the globe. While the majority of cross-border parcels continue to be delivered by posts, increased competition motivates the sector to respond to market trends. The insights and issues identified in the study have also helped IPC to develop a number of solutions to improve the cross-border delivery experience for both e-retailers and consumers. Our aim is to embed postal delivery solutions within the shopping carts of leading global e-retailers, as IPC tools become increasingly important to respond to the market needs identified.”

Three leading e-retailers continue to dominate most recent cross-border e-commerce purchases

According to the research, consumers in all markets are embracing e-commerce. In particular, consumers in China, India, Korea and the United States are the most active online.

When it comes to origin of the goods purchased, China remains the most popular market for consumers around the world to shop from, accounting for 34% of most recent cross-border purchases, followed by the US (18%), Germany (12%) and the UK (12%). Purchases from China were highest in Russia (79%), Hungary (60%), Brazil (53%) and the

US (52%).

Based on the 31 markets surveyed, Amazon, eBay and Alibaba / AliExpress accounted for 56% of the most recent cross-border e-commerce items purchased, with Amazon being the top pick in Luxembourg (72%) and Austria (64%), eBay in Cyprus (63%) and AliExpress in Russia (69%).

Direct mail plays an important role for e-commerce

This year, respondents were asked whether they received advertising mail (i.e. paper adverts and catalogues) from e-retailers in the past year and to identify these e-retailers. On average 51% answered this question affirmatively.

Advertising mail was most used by e-retailers in India (71%), China (67%), Switzerland (65%), Finland (64%) and Germany (63%) and least used by e-retailers from Cyprus, Iceland, Denmark and Australia.

The responses show that advertising mail is very effective; of the respondents who received advertising mail, more than half of them (51%) visited the e-retailer's website as a result. A significant 44% made an online purchase as a result of this direct mail from the e-retailer. Furthermore, 19% shared the advertising mail with someone and 14% engaged with the e-retailer via social media after receiving it.

Consumer preferences

While a laptop (34%) is the most popular device used to shop online, smartphone preference increased to 24% in 2017 - and was highest in China (53%), India (51%) and the US (43%).

When buying online cross-border, the vast

majority of consumers (93%) want to know the full cost of delivery before purchase and count on being able to benefit from a simple and reliable returns process (90%).

74% of respondents had a parcel delivered to their home in the past year while 26% picked up a parcel from the post office. Delivery to a post office was highest in Russia (76%), while office/workplace delivery was most popular in China (44%) and India (41%).

When looking at parcel tracking options, 27% of consumers stated that tracking was always offered and half said that it was offered most of the time. While all stages of cross-border tracking were deemed 'very/rather important', "parcel will be delivered today, at a specific date/time" had the highest level of importance of all stages tested, being considered 'very important' by 60% of respondents.

Shopping experiences

The top four categories bought cross-border were clothing, footwear & apparel (30%); consumer electronics (19%); health & beauty (14%) and books, music & media (10%).

When looking at the value of the goods bought by cross-border online shoppers, goods ordered online cross-border are mostly low-weight and low-value items, with 84% weighing up to 2kg, and 39% valued less than €25.

Delivery experiences

This year's survey shows that free shipping for cross-border purchases continues to increase: 62% of respondents received free shipping for their most recent cross-border e-commerce purchase. Russian (83%) and Chinese (76%) consumers benefited the most from free shipping.

70% of shoppers used the post for their most recent cross-border purchase, with Russia (87%) and Brazil (86%) taking the lead. Overall, 85% were satisfied with their delivery experience.

13% of consumers paid customs duties or customs clearances fees for their most recent cross-border online purchase. Of the respondents who had to pay for customs, almost half (48%) of them paid it while making the online purchase. Non-European consumers, who are more used to paying customs fees, tended to pay upfront, while European customers, who are familiar with the EU Single Market, tended to pay customs at a later stage.

To download the key findings from the research go here. IPC members have access to the full report, as well as country-specific breakdowns – those reports are available here after login.

Notes to editor:

Scope of the research: The IPC cross-border shopper survey took place in 31 countries: Austria, Australia, Belgium, Brazil, Canada, China, Cyprus, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, India, Italy, Luxembourg, Mexico, the Netherlands, New Zealand, Norway, Portugal, Russia, Slovenia, South Korea, 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 popular per country.

Methodology: Quantitative research using online access panels supplied by Survey Sampling International (SSI). Fieldwork took place from 29th September to 20th October 2017.

Sample size: 28,892 completed responses for all the markets. The sample size was c.1000 respondents for 27 of the 31 survey countries (a smaller sample size was used in Luxembourg, Cyprus, Iceland and Slovenia).

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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