

Cross-border online shoppers are willing to pay more for more sustainable delivery and packaging

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In its fourth edition, the IPC cross-border e-commerce shopper survey has been extended to over 33,500 consumers in 41 different countries across North & South America, Asia Pacific, Europe and the Middle East, establishing itself as the largest-ever global consumer survey, focusing on cross-border e-commerce.

Cross-border e-commerce shopper survey 2018 - overview

The countries included in the scope of the survey are: IPC member countries , Brazil, Canada, Russia, India and China as well as Hong Kong, Indonesia, Japan, Latvia, Malaysia, Mexico, Philippines, Saudi Arabia, Singapore, Slovenia, South Korea, Thailand and Vietnam. In 2018, IPC has further deepened its research into consumer expectations and experiences when shopping cross-border.

Holger Winklbauer, CEO of IPC said: “Thanks to the continued increase of the geographical scope and sample of our survey, we have been able to deepen and consolidate results from the previous years. Our research showed

once again that posts remain in an ideal position for delivering light-weight items through their network and also continue to be the delivery partner of choice of more than 70% of cross-border online shoppers. This edition is also marked by a significant expansion within South-East Asia, where consumers are younger, shop online more frequently and are more demanding when it comes to delivery. This provides important insights into future market developments for the posts”

Cost for sustainable packaging and delivery no issue for consumers

According to the latest research, consumers in all markets are well aware of the environmental consequences of the increase in cross-border e-commerce.

When looking at several aspects of sustainability, the survey found that 60% of respondents agreed that they would like their e-commerce packaging to be sustainable. When asked if they would be willing to pay €0.10 for sustainable e-commerce packaging, 50% of consumers agreed.

48% of respondents would like the delivery of their parcels to be carbon-neutral, and 43% would be willing to pay €0.10 for carbon-neutral delivery.

Cross-border e-commerce landscape still dominated by China and large retailers

At overall level, China accounted for 38% of most the recent cross-border purchases, followed by the US (15%), the UK (10%) and Germany (9%). Japan and Hong Kong each accounted for 3%, and France, Australia, the Netherlands and South Korea each accounted for 2%.

 Cross-border e-commerce shopper survey 2018 - retailers

When looking at the 25 trend countries, China's share has increased year-on-year. It rose by 7% in 2017 and by a slightly more moderate 3% in 2018. On the other hand, the other four largest countries have all slightly decreased in share over the past two years.

Based on the 41 markets surveyed, Amazon, Alibaba / AliExpress, eBay and Wish accounted for 64% of the most recent cross-border e-commerce items purchased. The main trend has been the rise of Wish over the past two years, while eBay's share continued to decline in 2018. Amazon was most common in Luxembourg (65%), Austria (59%) and India (48%) while Alibaba / AliExpress

was most popular in Russia (73%), Latvia (42%), the Netherlands (36%) and Brazil (35%). eBay was highest in Australia (44%), Cyprus (36%), the UK (35%) and Greece (33%) while Wish was most common in Sweden (25%), Hungary (25%) and Brazil (23%).

Posts remain ideally positioned for delivering light-weight items in a cost-effective manner

When asked about delivery, consumers confirmed that the post accounted for 71% of most recent cross-border deliveries.

When consumers were asked about their preferred place to have their parcels delivered to, the most convenient delivery location was home (59%), followed by a safe place at home (22%), office / workplace (18%) and an alternative address (18%).

The majority (84%) of cross-border parcels weighed up to 2kg, of which 9% weighed less than 100g, and 40% of goods purchased cross-border cost less than €25, with 47% of respondents saying that this purchase would have fit into their mailbox.

However, the trends also show that all consumers have increased expectations in terms of delivery speed year-on-year. When asked what one thing posts should do to improve cross-border delivery, 32% chose faster delivery.

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

Notes to editor:

Scope of the research: The IPC cross-border shopper survey took place in 41 countries: Austria, Australia, Belgium, Brazil, Canada,



China, Cyprus, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, Iceland, Indonesia, Ireland, India, Italy, Japan, Latvia, Luxembourg, Malaysia, Mexico, the Netherlands, New Zealand, Norway, the Philippines, Portugal, Russia, Saudi Arabia, Singapore, Slovenia, South Korea, Spain, Sweden, Switzerland, Thailand, Vietnam, 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 Research Now SSI. Fieldwork took place from 2 to 23 October 2018.

Sample size: 33,589 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

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.

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