

International **Post**
Corporation

CROSS-BORDER E-COMMERCE SHOPPER SURVEY 2022

Key Findings



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MARKET INTELLIGENCE

24 pages
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MESSAGE FROM THE CEO



Holger Winklbauer
Chief Executive Officer, IPC

I am delighted to present to you the key findings of the 2022 IPC Cross-Border E-Commerce Shopper Survey. This year, our survey researched 33,009 consumers in 39 countries in Europe, Asia-Pacific, and the Americas. Of these 39 countries, 25 have been researched for the past seven years, providing a wealth of trend data to the members of IPC. This year's research took place in October 2022 and all the analysis and reporting was conducted internally within IPC.

The aim is to inform postal operators of changing customer needs so that they can make informed decisions about their international product portfolio and delivery service specifications. The IPC Cross-Border E-Commerce Shopper Survey 2022 provides a comprehensive analysis of the global trends and drivers shaping cross-border e-commerce from the perspective of online consumers.

During 2022, the 'cost of living crisis' impacted on e-commerce, with 28% of respondents buying less online in 2022 than in 2021.

With their disposable income reduced, 42% of respondents strongly agreed that free delivery will become a more important element of their online shopping.

Although this was yet another challenging year, certain e-retailers continue to perform strongly. Twenty seven percent of most recent cross-border purchases were made on Amazon, while Shein (6%) saw its market share increase. As in previous years, the top exporting countries for cross-border e-commerce are China, Germany, the US and the UK.

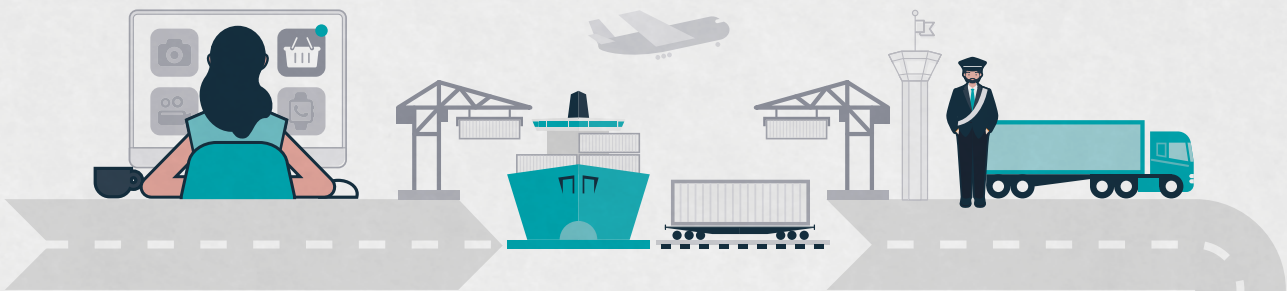
This year's report of the 2022 IPC Cross-Border E-Commerce Shopper Survey provides a high-level selection of the key findings.

I hope that the findings from this survey will help you understand rapidly evolving needs and expectations of cross-border online shoppers.

KEY FIGURES



The IPC Cross-Border E-Commerce Shopper Survey 2022 researched over 33 thousand cross-border online shoppers spread across 39 countries to gain insight into their purchasing habits and how often they buy products cross-border online. Out of the 39 participating countries, 25 have participated since the beginning of the survey, providing seven years of invaluable insights into consumer trends and habits.



33% order online at least once per week

64% buy from China, Germany, the US and the UK

18% paid customs duties



37% delivered in less than 5 days

42% said free delivery will become more important

53% bought from Amazon, AliExpress and eBay



46% delivered to the doorstep

71% were satisfied with delivery location

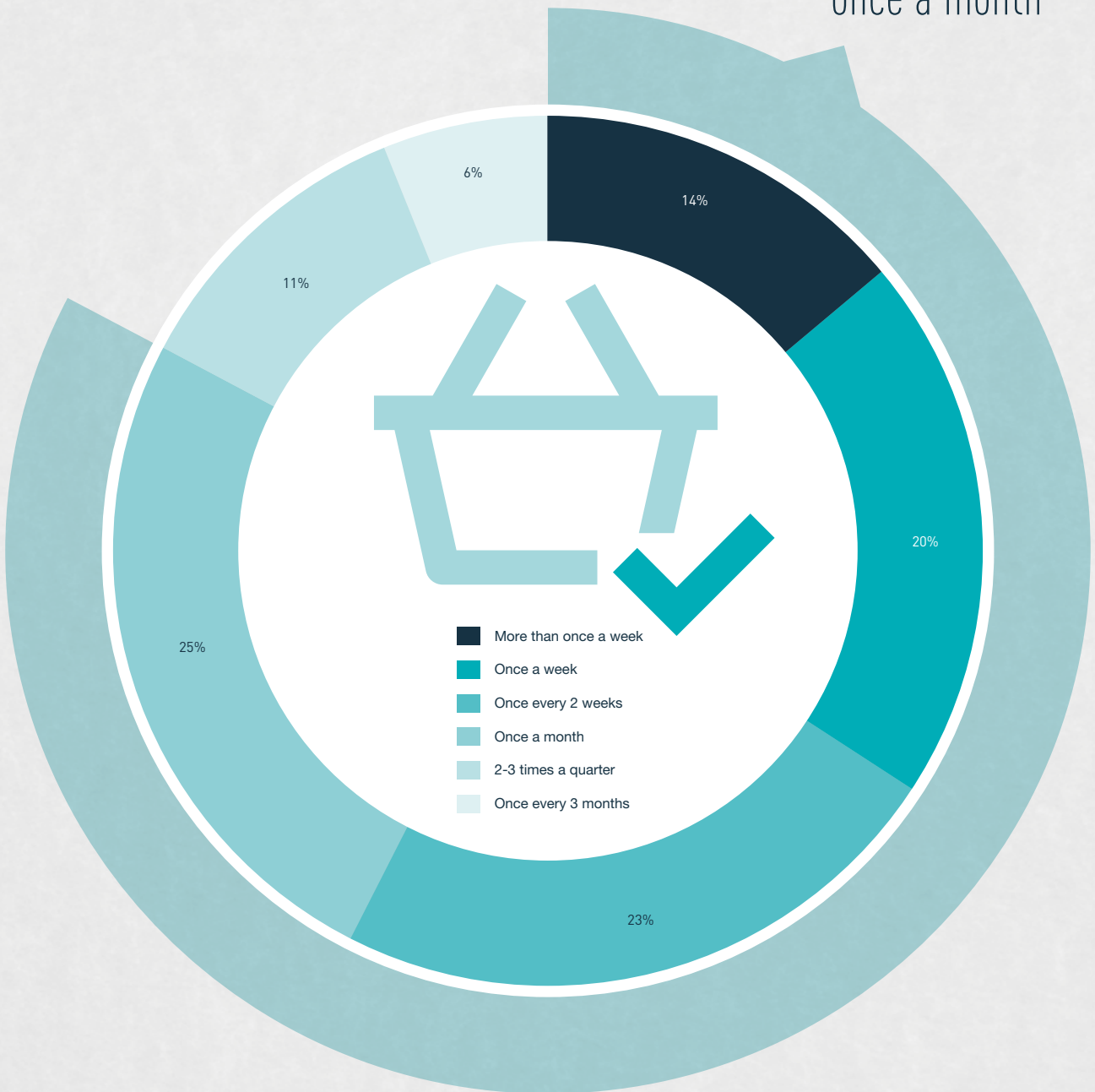
10% returned (part of) the package

E-COMMERCE TRENDS



In order to participate in the IPC Cross-Border E-Commerce Shopper Survey, respondents were first asked how often they shop online and only those that shopped at least once every three months or more were allowed to complete the survey. Out of the cross-border online shoppers, only 17% of shoppers bought online 1-3 times every quarter.

83%
shop online at least once a month



* See page 23 for the full list of the trend countries

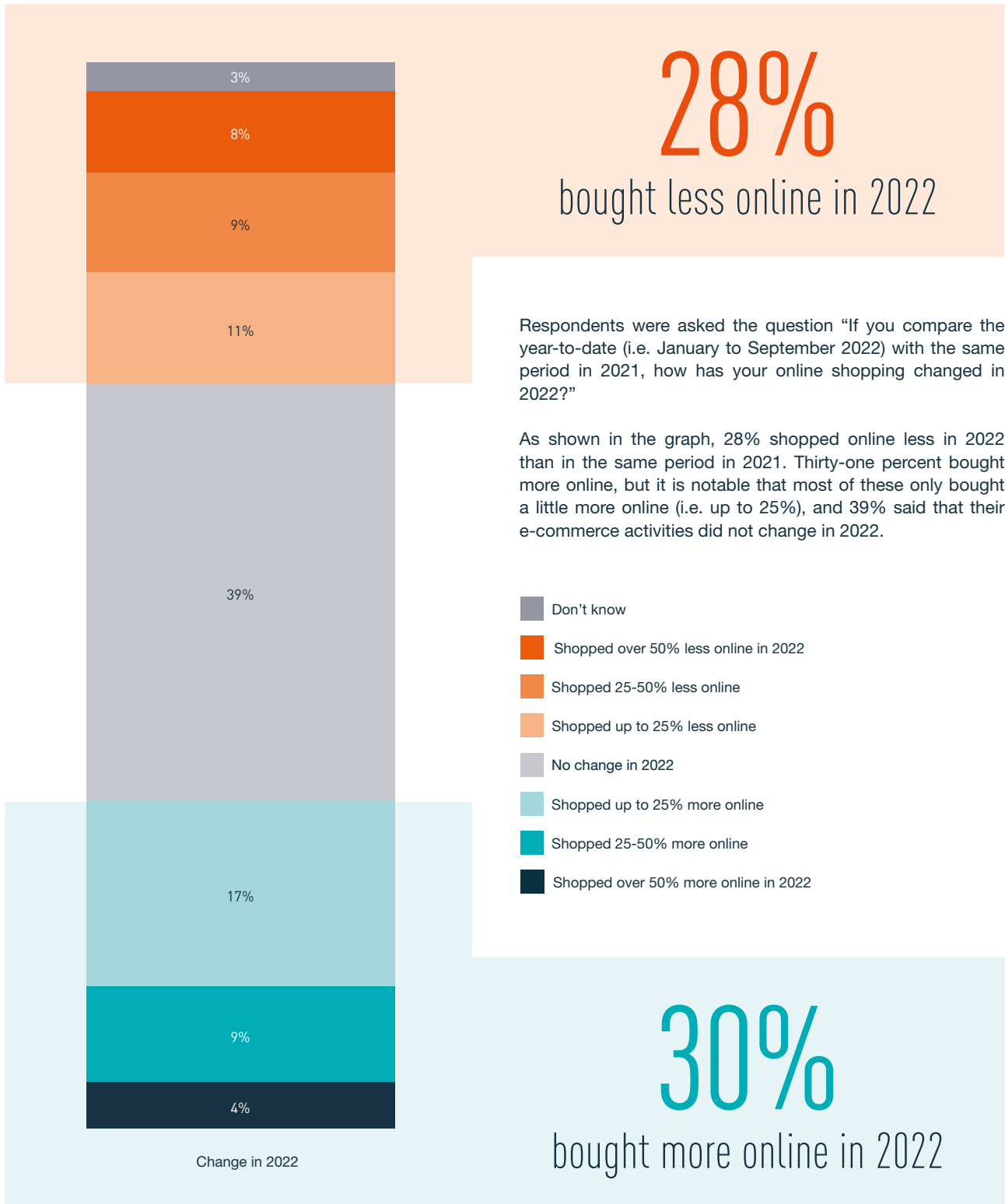
Question: Over the past 12 months, on average how often have you purchased physical goods online?

Sample: 33,009



E-commerce in 2022

28% shopped online less in 2022 than in 2021



Question: If you compare the year-to-date (i.e. January to September 2022) with the same period in 2021, how has your online shopping changed in 2022?
Sample: 33,009





Impact of the 'Cost of Living' crisis

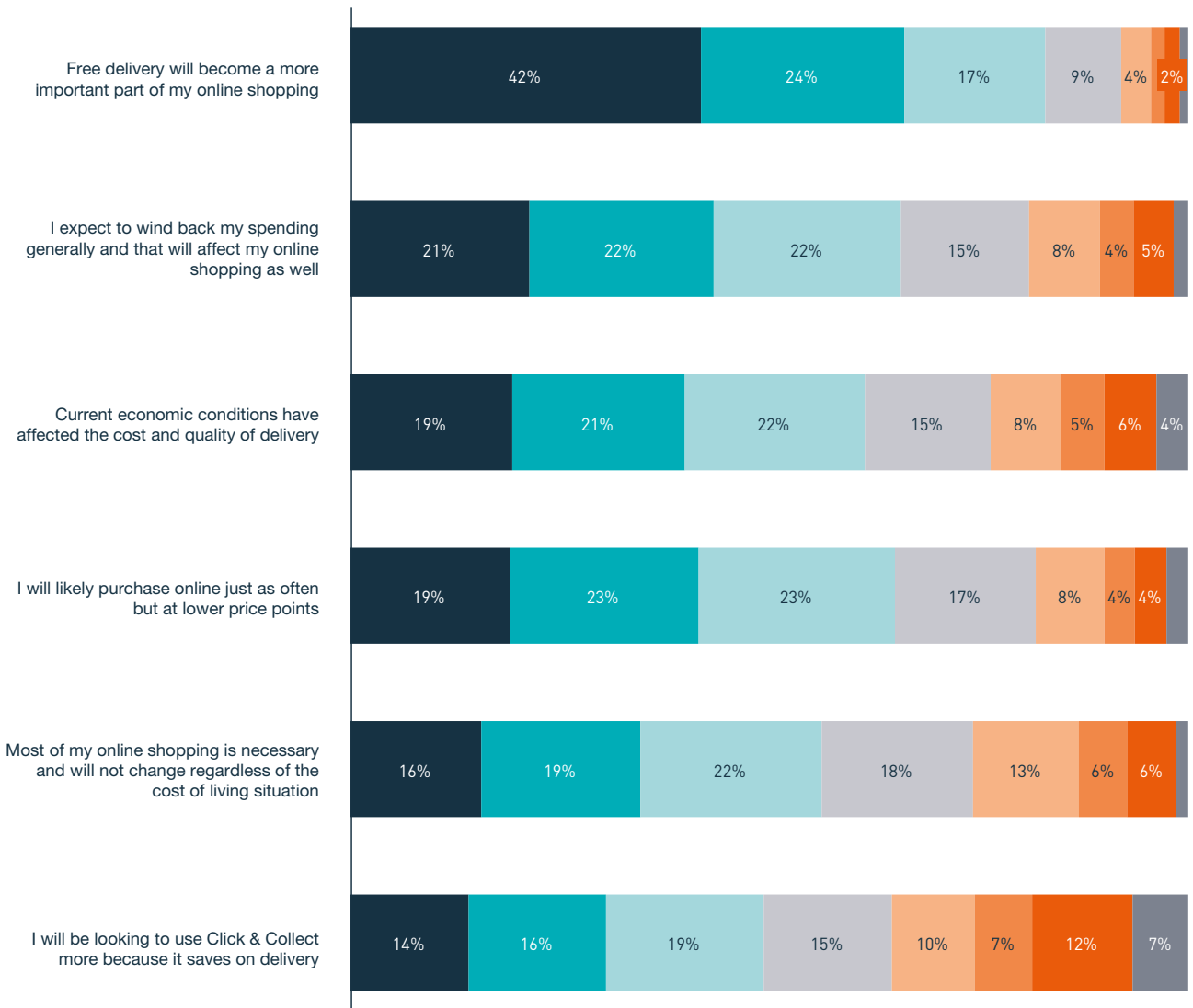
Economic concerns mean that consumers really value 'free' delivery

In the context of the e-commerce slowdown in 2022, IPC measured consumer attitudes towards the current economic situation and the 'cost of living crisis' by giving participants the option to choose from six statements.

Twenty-one percent of respondents strongly agreed that they "Expect to wind back spending generally, and that will affect their online shopping as well". Only 5% strongly disagreed with the statement.

Agreement with this statement was clearly the highest: "Free delivery will become more important" (42% strongly agreed), which shows that consumers are still not willing to pay for delivery.

While almost half of all respondents agreed (in various degrees) that they will be using Click & Collect pickup services more because it saves on delivery, 29% of them disagreed with this statement.



7 – Strongly agree
 6
 5
 4
 3
 2
 1 – Strongly disagree
 I don't know

Question: Thinking of the current economic and cost of living situation, to what extent do you agree with the following statements?

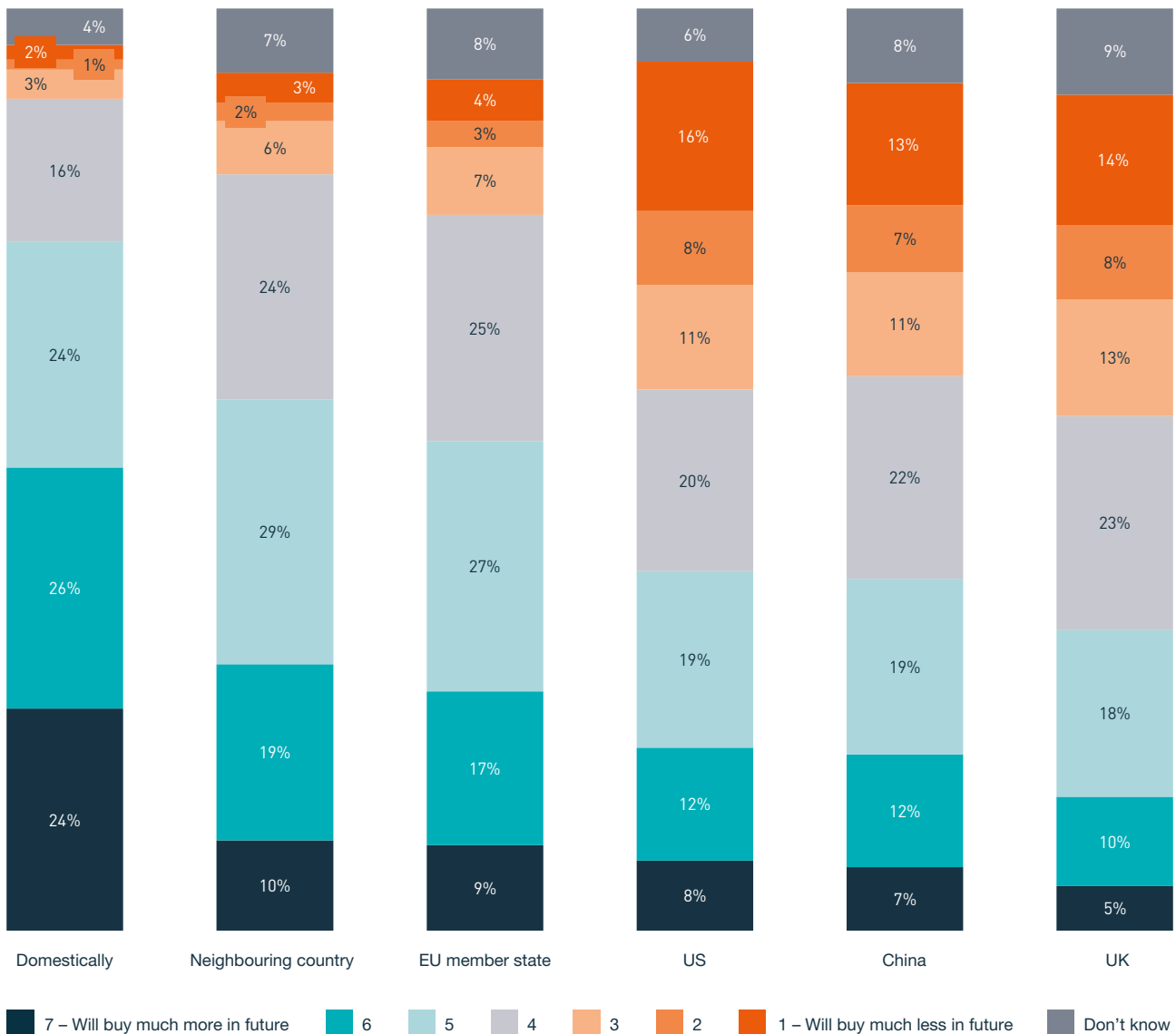
Sample: 33,009



Future e-commerce intentions

Growth for domestic e-commerce and decline in imports from the UK and China

Respondents of the survey were asked to consider whether they intend to change their shopping habits in the future, and if they will choose to shop online domestically or from countries much closer to their homes.



Key findings:

- Domestic e-commerce is forecast to grow the most, with 24% saying they will buy much more from domestic-based e-shops in the future.
- A significant proportion will buy less from the UK, China and the US in the future.

Question: Looking to the future, to what extent will you buy more online or less online from each of the following countries / regions?

Sample: 33,009

Notes: Codes were only shown where it was logical (e.g. "from a neighbouring country" wasn't shown in Iceland, and "from the US" wasn't shown in the US).



MOST RECENT CROSS-BORDER E-COMMERCE PURCHASE



Respondents were asked to provide details on their most recent cross-border online purchase, including details about where they bought the product from, what were the characteristics of the product, the delivery of the product and how satisfied were they with the delivery elements for this purchase.

Country of most recent purchase

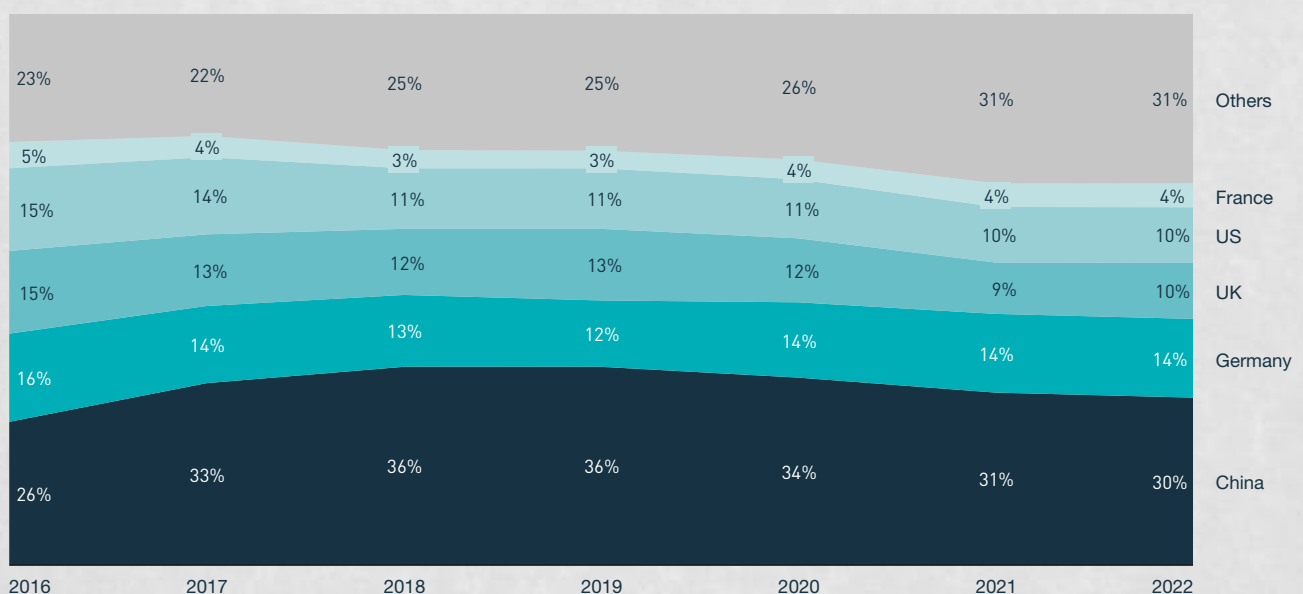
All survey countries

When asked to provide details on the country of origin of their most recent online purchase, 32% of respondents had bought from China, 13% from the US, 12% from Germany and 9% from the UK.

Purchases from China were the highest in Brazil and Chile (both 68%). The top three sources per country are detailed in the map on the next two pages.

Trend countries only

When looking at the 25 trend countries that have participated in the IPC Cross-Border E-Commerce Shopper Survey since 2016, China's share in the e-commerce market decreased by 1pp in 2022 while the UK's stabilised after dropping 3pp in 2021. The stable share of 'Other' reflects that consumers increasingly buy from other countries (likely from neighbouring countries) than from one of the 'Big 4' e-commerce exporters in 2022.



Question: Please specify the country from which you bought this most recent online cross-border purchase.
 Sample: 33,009 and 22,700 (Trend)



Country of most recent purchase

Top three cross-border markets purchased from per country

USA

China	41%	▲
UK	15%	▲
Canada	9%	

CANADA

US	46%	
China	32%	
UK	6%	

CHINA

Japan	15%	▼
Australia	11%	
US	11%	

JAPAN

China	34%	
US	26%	▼
S. Korea	22%	▲

SOUTH KOREA

US	47%	
China	24%	
Japan	11%	

MEXICO

US	46%	▼
China	40%	▲
Japan	6%	

BRAZIL

China	68%	
US	18%	
Japan	2%	

CHILE

China	68%	▲
US	22%	▼
Argentina	2%	

ARGENTINA

US	44%	
China	28%	
Brazil	9%	▲

INDIA

US	24%	▲
Australia	13%	
China	9%	

AUSTRALIA

China	34%	
US	26%	
UK	12%	▼

NEW ZEALAND

Australia	41%	
China	27%	
US	11%	▼

Question: Please specify the country from which you bought this most recent online cross-border purchase.

Sample: 33,009

Notes: ▲ Increased by 3% or more since 2021
▼ Decreased by 3% or more since 2021



ICELAND	
UK	26%
US	25%
China	11%

NORWAY	
China	33%
US	15%
UK	12%

SWEDEN	
China	34% ▲
Germany	20%
US	11%

FINLAND	
Germany	27%
China	23%
Sweden	14%

ESTONIA	
China	38% ▼
Germany	16%
Latvia	9%

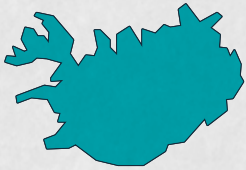
LATVIA	
China	44%
Germany	13%
Lithuania	9%

DENMARK	
Germany	29% ▲
China	20%
UK	11%

LITHUANIA	
China	48%
Poland	18% ▲
Germany	10%

UK	
China	38% ▲
US	23%
Germany	8%

POLAND	
China	50%
Germany	19%
UK	7%



IRELAND	
UK	60% ▲
China	13%
Germany	8%

GERMANY	
China	37%
UK	12%
Austria	8%

NETHERLANDS	
China	39% ▼
Germany	19%
UK	8%

SWITZERLAND	
Germany	35% ▼
China	22%
France	14%

BELGIUM	
Netherlands	33%
France	27% ▲
China	16%

AUSTRIA	
Germany	61% ▼
China	13%
UK	4%

LUXEMBOURG	
Germany	63%
France	13% ▲
China	9%

HUNGARY	
China	50% ▼
Germany	10%
Slovakia	7% ▲

FRANCE	
China	42% ▼
Germany	17% ▲
UK	8%

SLOVAKIA	
China	47%
Czechia	17%
Germany	9%

PORTUGAL	
China	40%
Spain	33%
UK	6%

SPAIN	
China	48% ▼
UK	10% ▲
Germany	10%

ITALY	
China	33% ▼
Germany	19%
UK	12%

CROATIA	
China	37%
Germany	18%
Slovenia	7%

GREECE	
China	38% ▼
Germany	14% ▲
UK	12%

SLOVENIA	
China	35%
Germany	20% ▲
UK	6%

Question: Please specify the country from which you bought this most recent online cross-border purchase.

Sample: 33,009

Notes: ▲ Increased by 3% or more since 2021
▼ Decreased by 3% or more since 2021



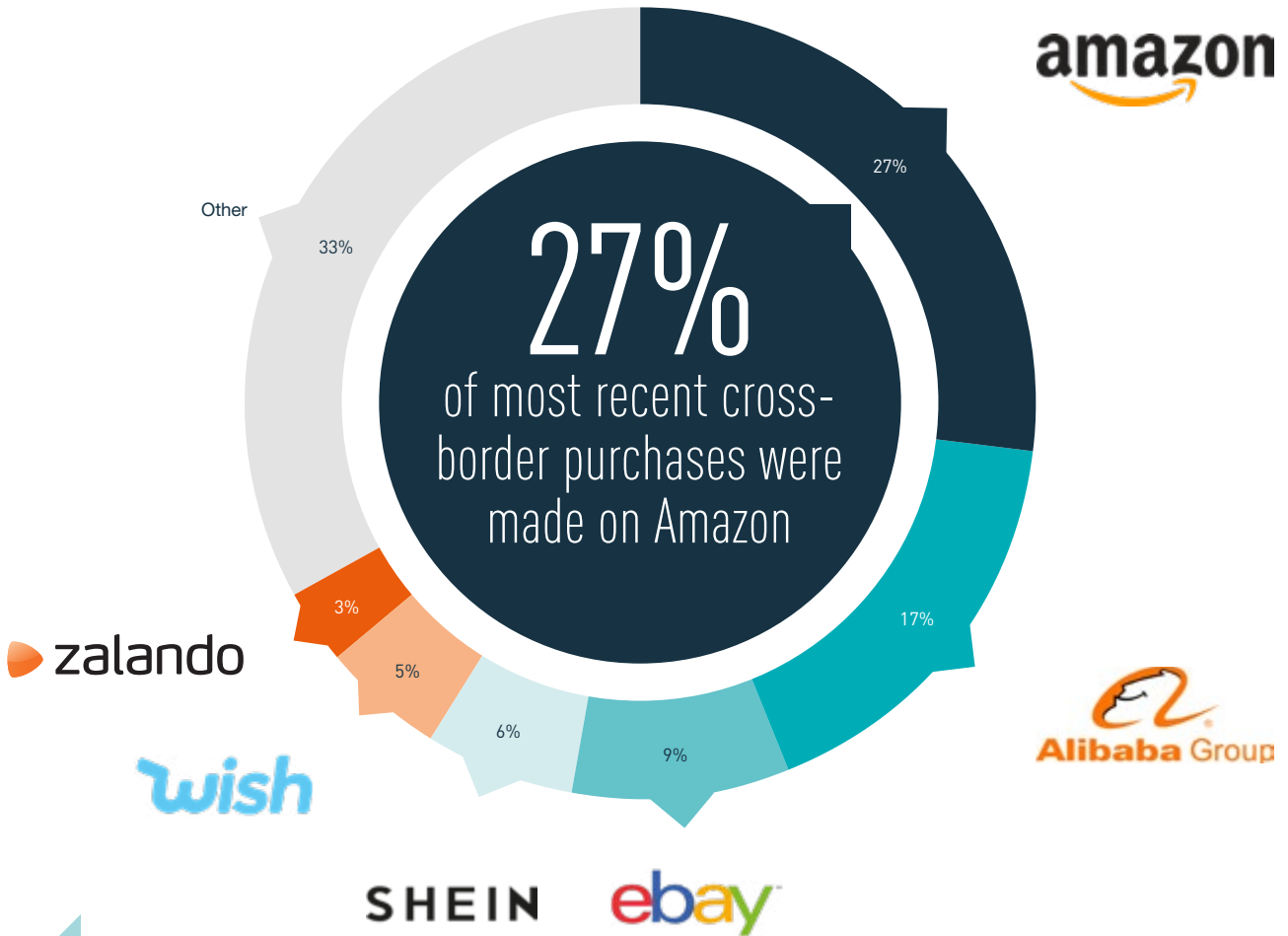


E-retailer used for most recent cross-border purchase

Amazon was used by more than half of shoppers in Luxembourg, India and Austria

Twenty-seven percent of the most recent cross-border purchases were made on Amazon, with AliExpress (17%) in second place, eBay (9%) in third place and Shein (6%) being the fourth most used e-retailer for cross-border e-commerce in 2022.

Between 2019 and 2022, both Wish and eBay each lost significant cross-border market share, while Amazon increased in several countries. Chinese fashion e-retailer Shein has also increased significantly from 0% in 2019 to 6% in 2022.



Key findings:

- Amazon (27%) was most common in Luxembourg (60%), India (56%), Austria (51%), Canada (47%), Italy and China (both 45%) and Mexico (42%)
- Alibaba / AliExpress (17%) was most popular in Lithuania (48%), Chile and Latvia (both 44%), Poland (40%) and Slovakia (38%)
- eBay (9%) was highest in Australia (32%), the UK (26%), Germany and Croatia (both 19%)
- Shein (6%) was highest in Cyprus (22%), Brazil (19%) and Greece (17%)
- Wish (5%) was most common in Hungary (17%) and Norway (14%)
- Zalando (3%) was highest in Finland (13%) and Denmark (11%)

Question: Please identify which retailer you bought this particular purchase from.
Sample: 33,009



PRODUCT CHARACTERISTICS



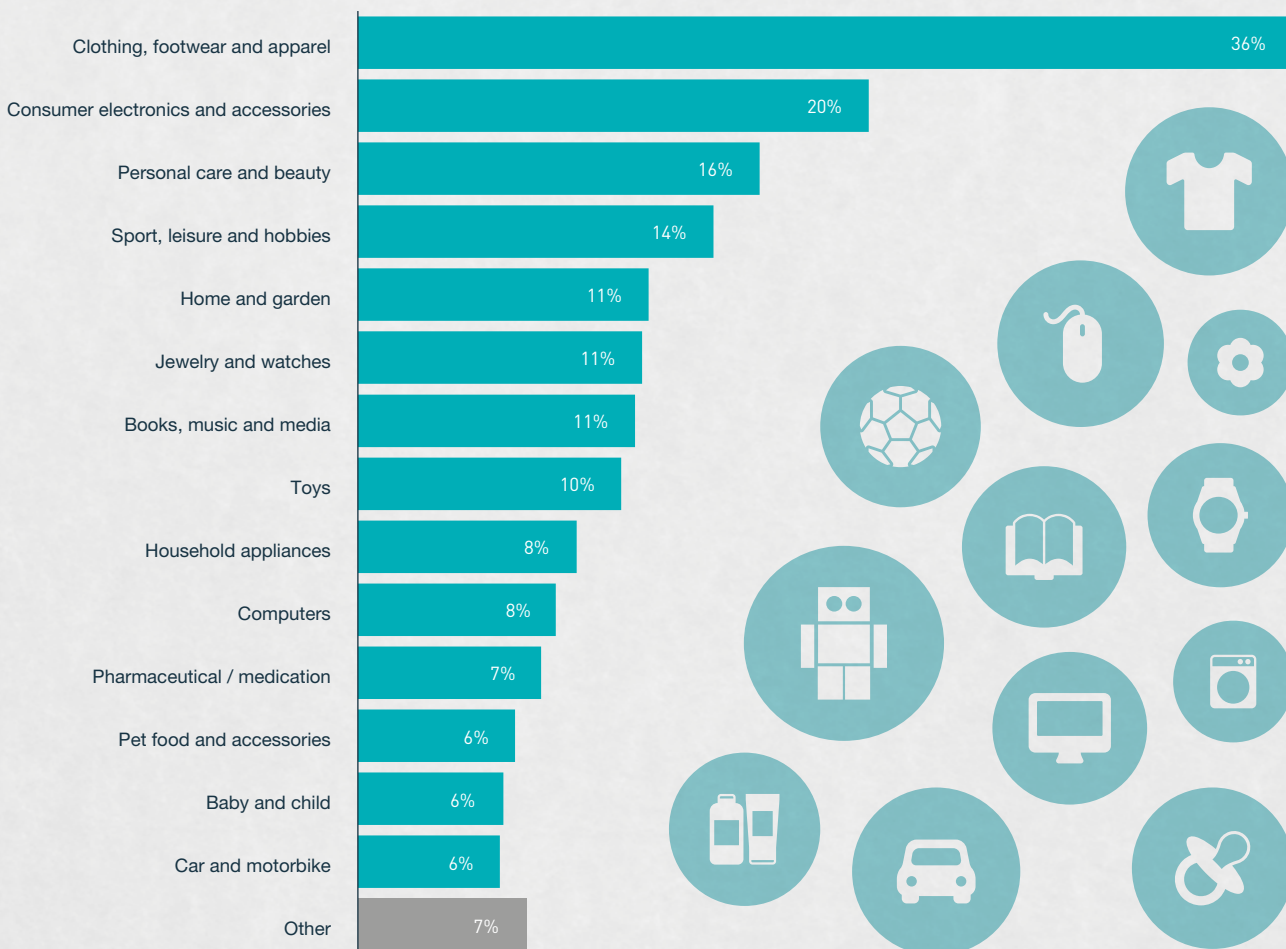
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Product category

Main cross-border purchase: clothing, footwear & apparel

Product category bought cross-border varies by country and region. The three leading categories bought cross-border were clothing, footwear & apparel (36%), consumer electronics (20%) and personal care & beauty (16%).

There were some major differences by region. Products from clothing, footwear and apparel category were bought most frequently in South and North America. Consumer electronics were most frequently bought in South America and personal care and beauty was most popular in Asia. Products from the home and garden category were bought most frequently in Europe.



Question: For this particular parcel, please specify what category of goods you purchased
 Sample: 33,009



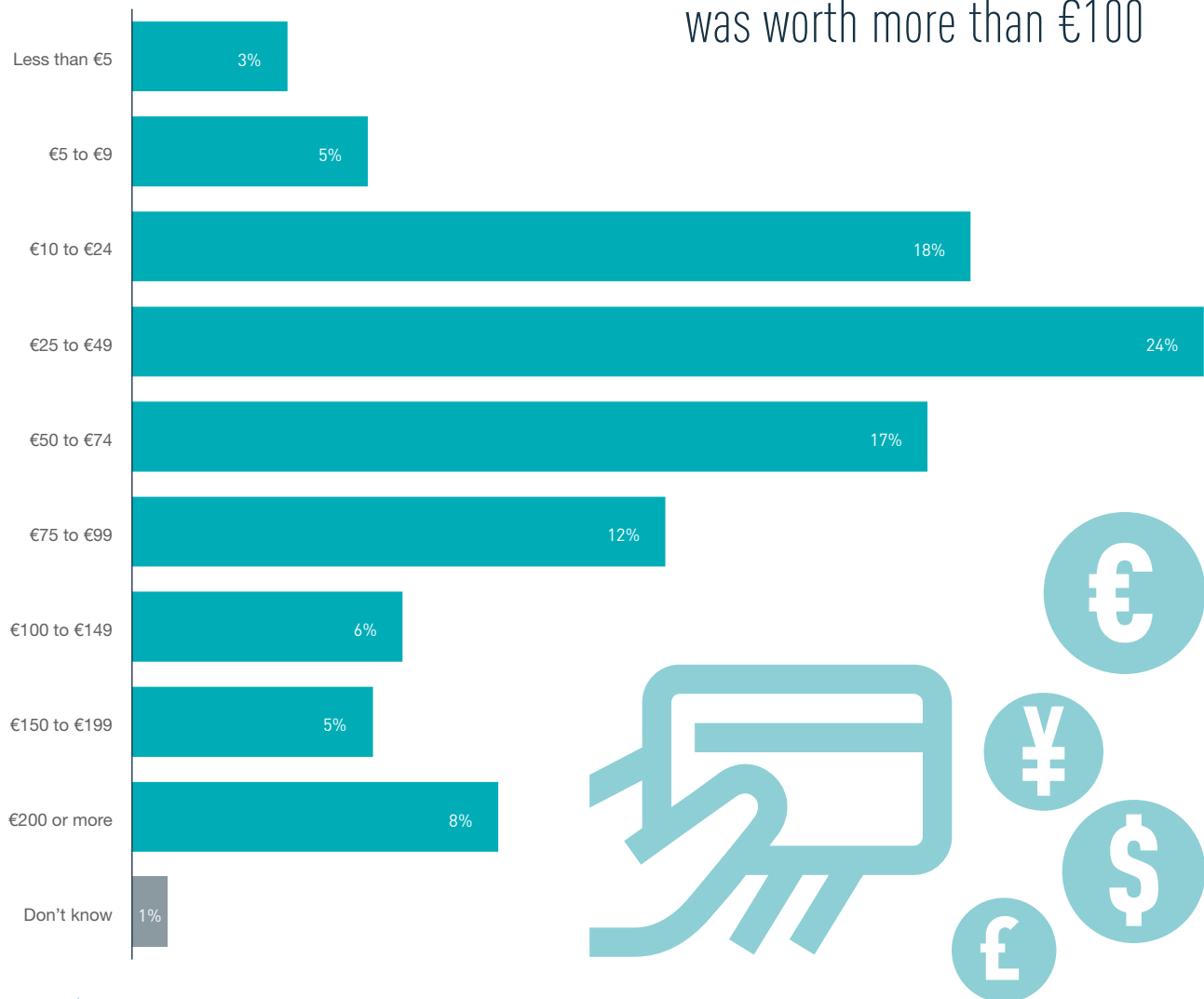
Product value

27% of cross-border items were valued below €25

Close to one in five orders were worth more than €100. The most common product value was €25 to €49 (24%), followed by €10 to €24 (18%) and €50 to €74 (17%).

19%

was worth more than €100



Key findings:

- Very cheap items - valued below €10 - were most common in Latvia (24%) and Slovakia (23%)
- Items valued below €25 were most common in Hungary (48%), Latvia (47%), Lithuania (45%) and Slovakia (44%)
- Items valued at €100 or more were most common in Brazil (57%)

Question: Please specify the approximate cost of goods within this particular purchase..
Sample: 33,009

DELIVERY EXPERIENCE



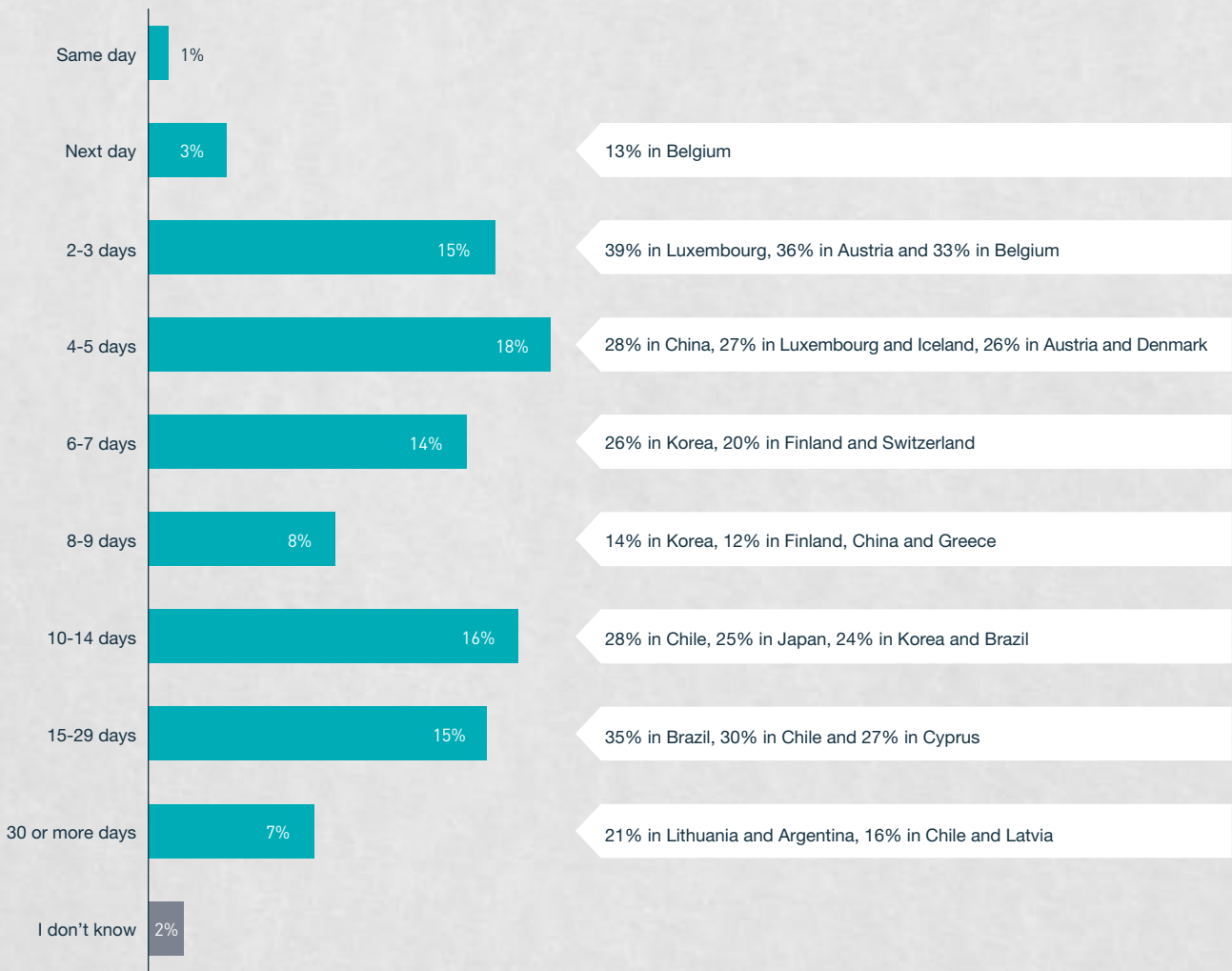
Delivery Speed

One in three received their package within 5 days

When asked how long the purchase took to arrive – from the moment of purchase until the day of the parcel’s arrival – 22% of respondents said that the item took 15 or more days. Further details and country highlights are shown in the graph below. This graph shows that delivery was usually fastest for consumers in countries who mainly buy from their neighbours, while delivery was slowest for those mainly buying from China.

Compared to 2021, cross-border shoppers in 2022 were slightly less likely to experience delivery in 1-3 days, but also less likely to receive the item in 15 or more days.

This indicates that consumers in 2022 are buying more from neighbouring countries and buying less from China. The 30% decrease in items taking 30 or more days also reflects the end of Covid-19 causing delivery delays in 2020.



Question: How long did it take, from buying the product online until the order was delivered?
 Sample: 33,009



Customs

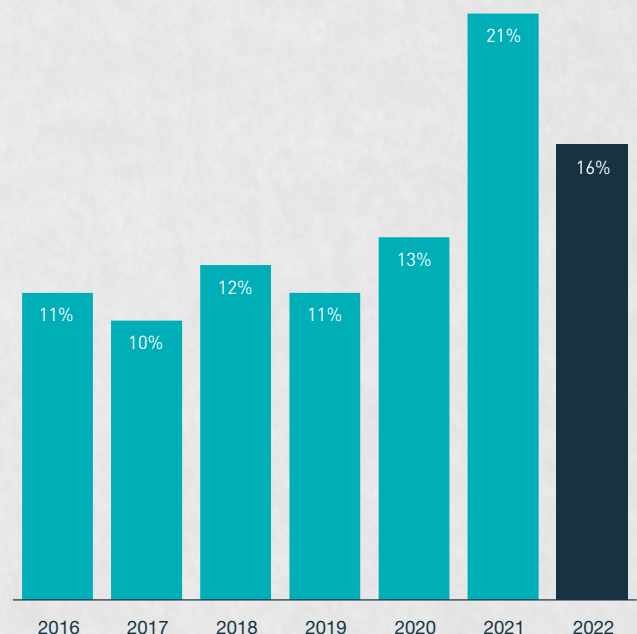
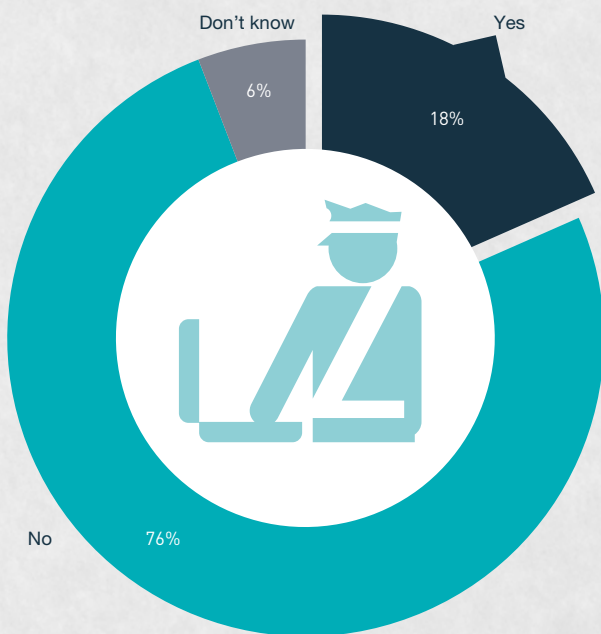
18% paid customs fees on their most recent cross-border online purchase

The countries with the highest proportion paying customs fees were India (73%), Iceland (60%), Argentina (58%) and China (48%). At the other end of the scale Portugal (5%), Belgium and Estonia (both 8%) paid the least.

When looking at the 25 trend countries, the proportion of consumers who had to pay customs duties on their most recent cross-border online purchase was between 10-13% from 2016 to 2020 and rose to 21% in 2021. In 2022, it decreased slightly, but still remained higher than between 2016-2020.

Seventy-nine percent of respondents were made aware pre-purchase that customs would be applicable for their cross-border purchase. As in previous years, this proportion was lower in Europe than in other regions (e.g. 41% of consumers were made aware in Iceland, 42% in Slovakia and 55% in Croatia).

Respondents were most likely to pay customs fees at the point of purchase (50%), while 30% paid customs while their parcel was en route and 16% paid when receiving the parcel, or after receiving it. European consumers tended to pay customs at a later stage than consumers elsewhere. When comparing the 25 trend countries from 2017 to 2022, they were increasingly likely to pay customs when the parcel was en route rather than when receiving the parcel or after receiving it. This shows an improvement in the efficiency of the customs payment process.



IPC has developed the Postal Delivered Duties Paid (PDDP) solution, which will further help posts to benefit from e-commerce growth. Through PDDP, posts will be able to offer an essential functionality, already offered by the integrators, and thus become more competitive on the cross-border market.

[Click here for more info.](#)

Question: Did you have to pay customs duty / customs clearance fees on this particular purchase?
Sample: 33,009 and 22,700 (trend)

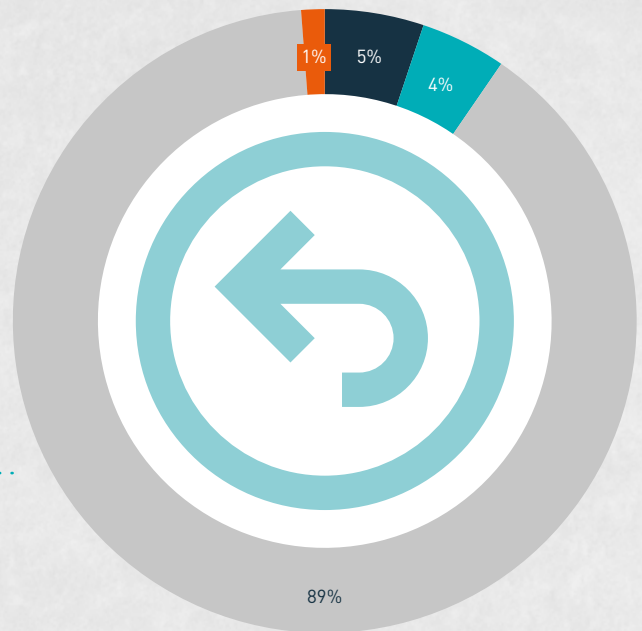
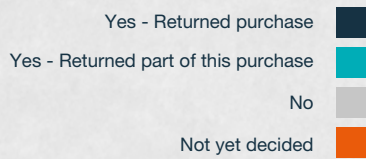


Returns

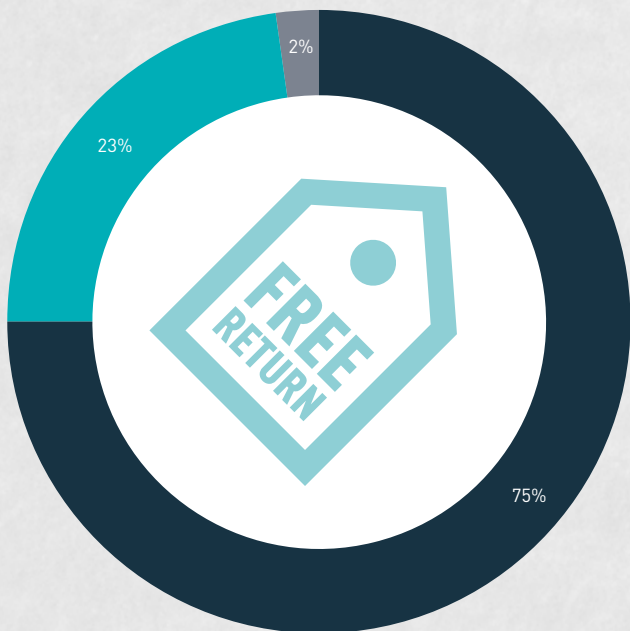
10% returned all or part of their purchase

Returns were highest in China (25%), New Zealand (22%), Switzerland (22%) and the US (21%). Looking at the 25 trend countries, 6% returned their entire purchase and 5% returned part of their purchase in 2022.

The top two return locations were drop off at either a post office or at a courier's parcel shop / postal service point which together accounted for more than 4 in 10 returns.

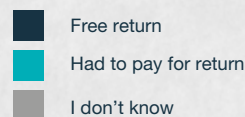


Question: Did you return this particular purchase (or part of this purchase)?
Sample: 33,009



Of those respondents who returned their parcel, 75% did so for free and 23% at a cost.

Of the major e-retailers, free returns was highest for Zalando, Amazon and Shein.



Question: Did you return it for free or did you have to pay postage to return this parcel?
Sample: Sample: 3,533 (those returning the item)

The IPC Returns Service provided through the IPC Common Return Platform (CRP) responds to the needs of both e-retailers and customers for an easy to use return process for cross-border e-commerce items. It provides e-retailers with a priority postage-paid label for their customers, either inside the original parcel or accessible through the internet.

[Click here for more info.](#)

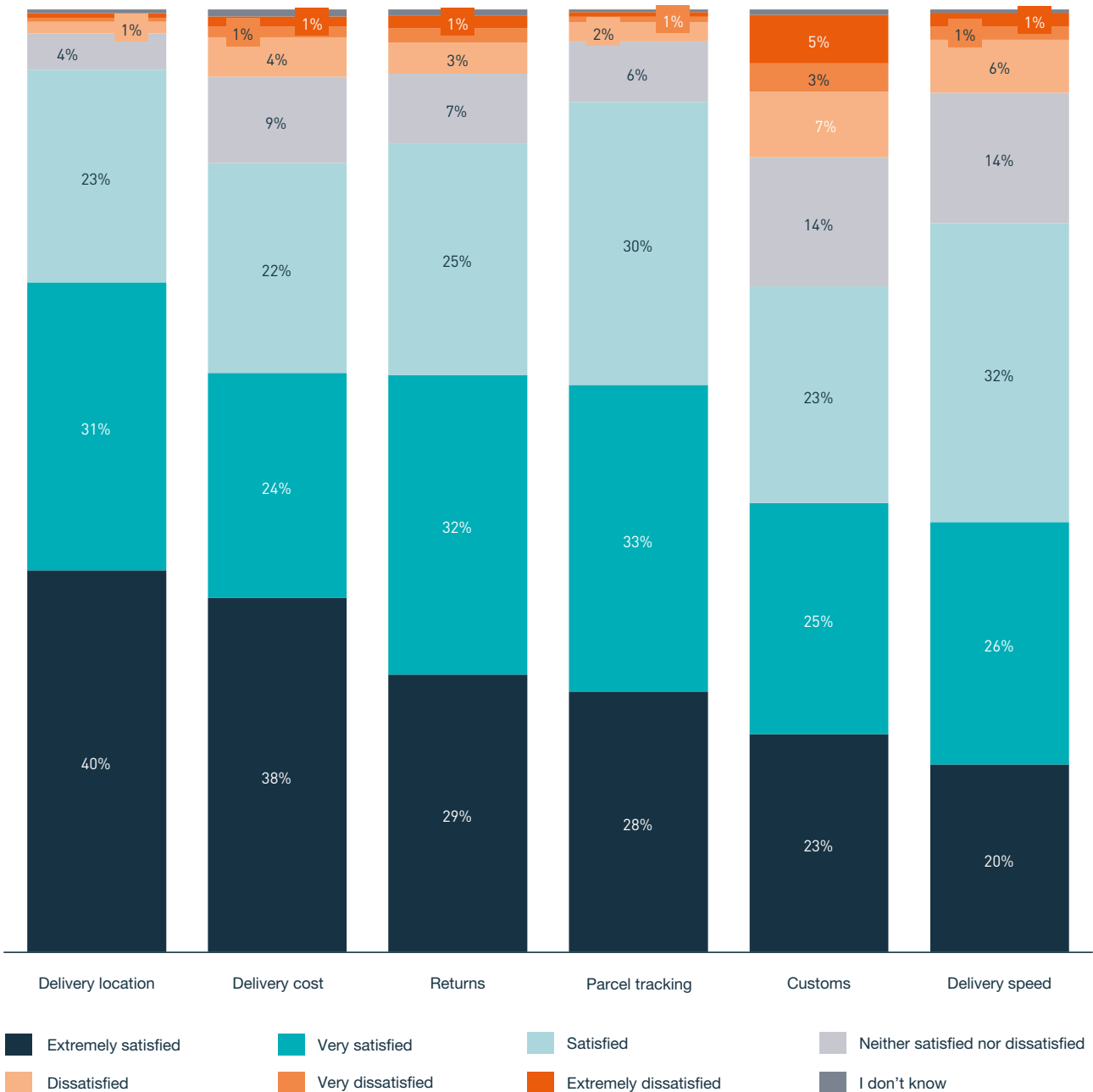


Customer satisfaction

Highest for delivery location, but lowest for customs and delivery speed

The IPC Cross-Border E-Commerce Shopper Survey 2022 asked respondents for their level of satisfaction with each element of the delivery process: delivery cost, tracking, speed, delivery location, customs and returns. Satisfaction was highest for delivery location (71% extremely / very satisfied) and lowest for delivery speed (46%).

Satisfaction with returns, tracking and customs was only asked to respondents who had experienced those three delivery elements.



Question: How satisfied were you with...
Sample: 33,009





Complaint handling

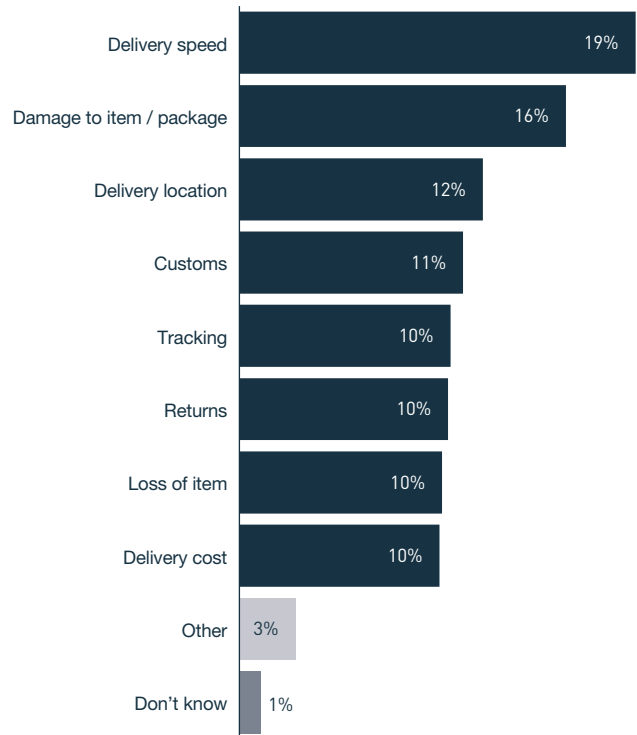
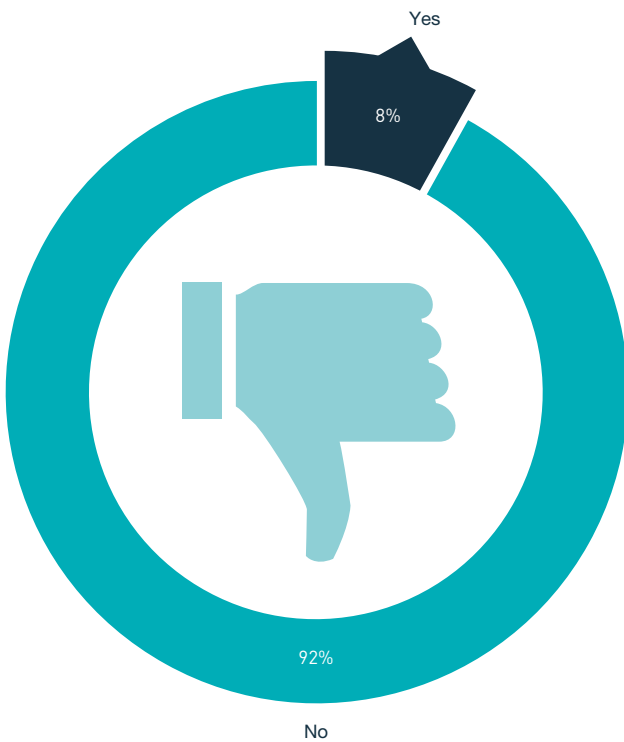
Mostly complaints about delivery speed and damage to item

The question to assess whether consumers often complaint about the delivery of their items after shopping cross-border was asked for the second year in 2022. Eight percent said that they had complained about the item's delivery, and this ranged from 23% in New Zealand and 20% in Switzerland, to 2% in Portugal.

As shown in the graph to the right, the most common complaint was clearly about delivery speed (19%), followed by damage to the item (16%).

7%

of those using postal delivery made a complaint, compared to 10% of those using delivery by another provider



As international e-commerce volumes continue to increase, postal customer services must deal with an increasing number of demands from e-retailers and consumers for swift resolution of their inquiries.

IPC's Global Customer Service System (GCSS) is a web-based application enabling the exchange of inquiries between customer service departments of the posts. It currently links 290 call centres globally in 190 countries

[Click here for more info.](#)

Question: Did you make a complaint about the delivery of this item?
Sample: 33,009

Question: What was your complaint about?
Sample: 3,056 (those making a complaint)

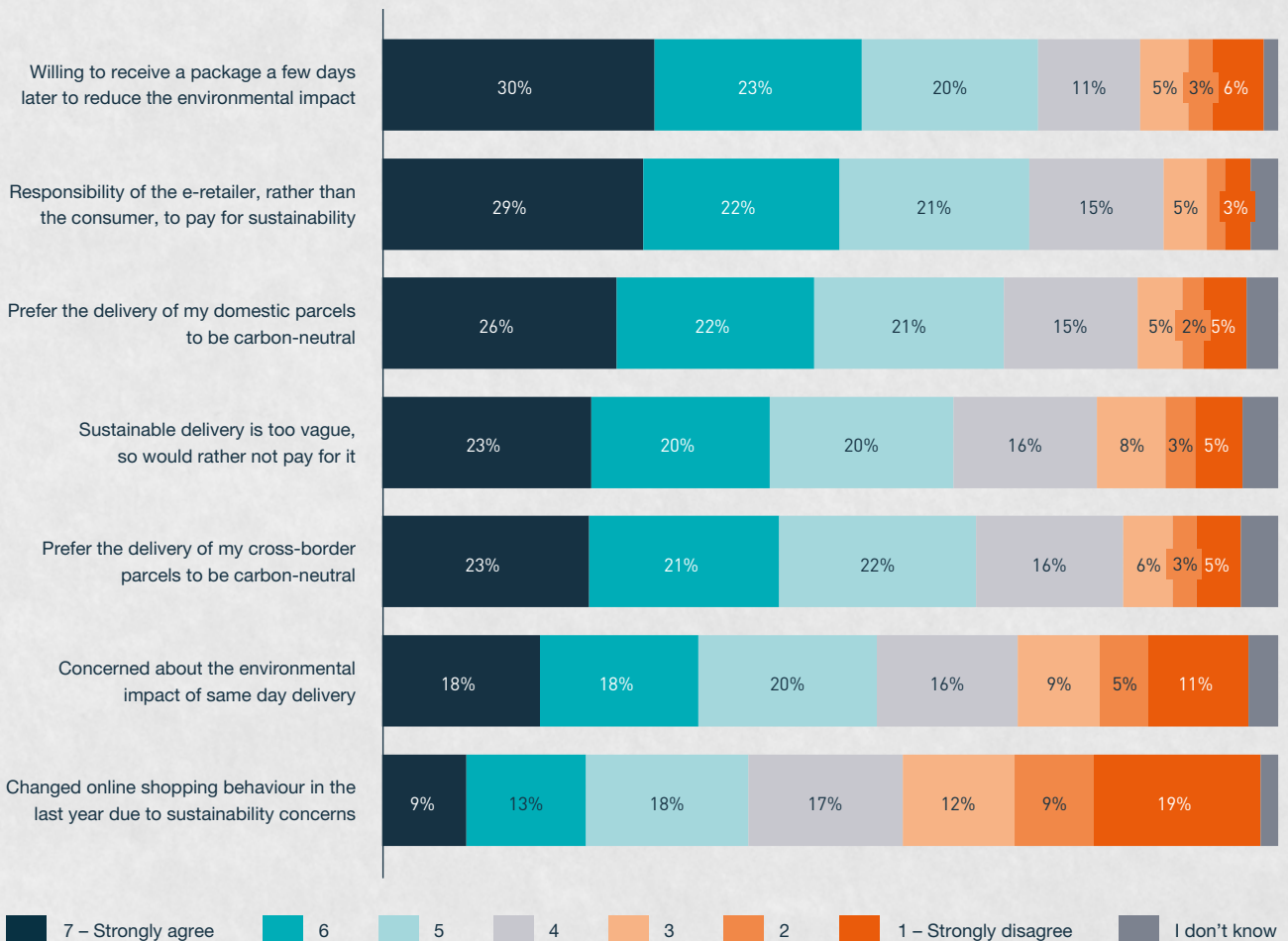
SUSTAINABILITY PREFERENCES



More than half of respondents are willing to receive a package a few days later to reduce the environmental impact

Respondents were presented with several statements related to sustainable (carbon-neutral) deliveries and were asked the extent to which they agree with them. Thirty percent strongly agreed that they would be willing to receive a parcel later to reduce its environmental impact, 26% strongly prefer carbon-neutral delivery for domestic purchases, and 23% strongly prefer carbon-neutral delivery for purchases from foreign e-retailers.

Despite these positive intentions, a smaller percentage said they had changed their online shopping behaviour due to sustainability concerns, and a significant proportion were not concerned about the environmental impact of same day delivery.



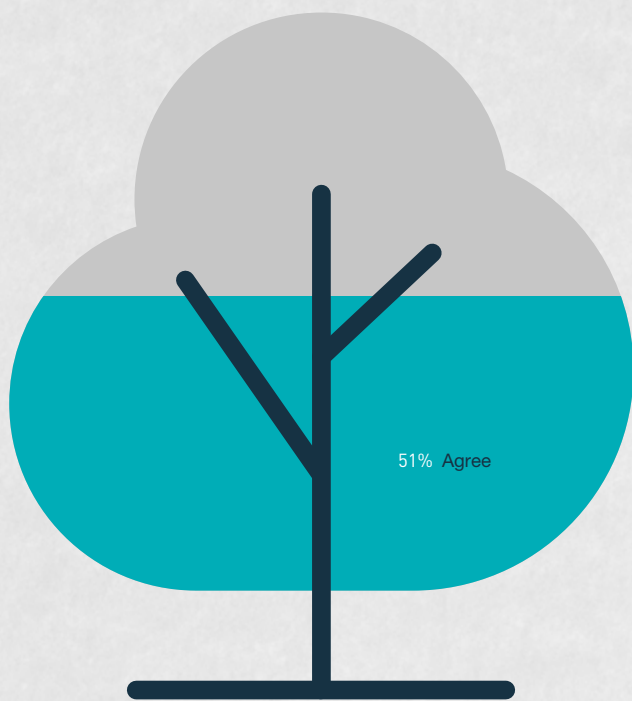
Question: To what extent do you agree with each of the following statements on the topic of sustainable (carbon-neutral) delivery?
 Sample: 33,009



Sustainability - who should pay for it?

All respondents were asked if they had ever been offered the option to pay extra for sustainable (i.e. carbon-neutral) delivery by an e-retailer. 17% said that they had been offered this before.

Of these, only 14% ever paid for this. However, over half of all respondents claimed that it's the e-retailer rather than them directly who should pay for sustainability.



51%

say that it's the responsibility of the e-retailer, rather than the consumer, to pay for sustainability.

Question: Considering your previous online purchases, have you ever been offered the option to pay extra for sustainable (carbon-neutral) delivery?

And have you ever paid extra for sustainable (carbon-neutral) delivery?

To what extent do you agree with each of the following statements on the topic of sustainable (carbon-neutral) delivery?

Sample: 5,997 (offered sustainable delivery)



IPC Sustainability Programme

IPC Sustainability Measurement and Management System (SMMS)

The IPC Sustainability Measurement and Management System (SMMS) was launched in 2019 to address the sustainability objectives of the postal sector for the next ten years, aligned with the UN Sustainable Development Goals (SDGs). It expands on the 2009-2019 Environmental Measurement and Monitoring System (EMMS) programme, which focused on reducing carbon emissions, and broadens the remit to the seven sustainability focus areas most relevant for the postal sector: Health and safety; Learning and development; Resource efficiency; Climate change; Air quality; Circular economy and Sustainable procurement.

The seven sustainability focus areas were decided upon following a two-year process involving research, consultation with internal and external stakeholders and multiple iterations. As such, the SMMS programme is designed to further the postal sector's contribution to global sustainable development, focusing on the areas in which it can have the most impact. This is a global initiative, involving 21 participants from four continents – Africa, Asia Pacific, Europe and North America.

[Click here for more info.](#)

IPC MARKET INTELLIGENCE



IPC Global Postal Industry Report

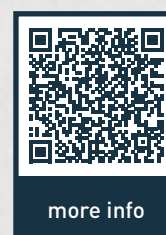
The IPC Global Postal Industry Report is the sector's most comprehensive, holistic and in-depth report on postal industry trends and performance.

- Over 130 pages of industry-specific analysis updated and refreshed each year
- Worldwide coverage of 53 postal operators
- In-depth review and comparison of corporate and business unit performance
- Solid foundation to benchmark performance and better understand industry trends
- 2022 report available for free to IPC members and for purchase and immediate download for non-members



IPC Carrier Intelligence Reports

IPC Carrier Intelligence Reports provide instant access to critical financial, operational, strategic and market information for more than 50 leading postal and parcels operators from Africa, the Americas, Asia Pacific and Europe in an easy-to-read, consistent format. The reports are free to download for IPC members and available for purchase and immediate download for non-members.



SURVEY METHODOLOGY



Scope of the research

The IPC Cross-Border Shopper Survey 2022 took place in 39 countries: Argentina, Austria*, Australia*, Belgium*, Brazil, Canada*, Chile, China*, Croatia, Cyprus, Denmark*, Estonia, Finland*, France*, Germany*, Greece*, Hungary*, Iceland*, India, Ireland*, Italy*, Japan, Latvia, Lithuania, Luxembourg*, Mexico, Netherlands*, New Zealand*, Norway*, Poland, Portugal*, Slovakia, Slovenia*, South Korea, Spain*, Sweden*, Switzerland*, the United Kingdom* and the United States*.

* Indicates the 25 countries included in the seven-year trend analysis.

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 2022.

Sample size

33,009 completed responses for all the markets. The sample size was between 100 and 1,000 respondents per country.

Access to the full research findings and reports for each of the 39 countries is restricted to IPC members at www.ipc.be/shopper.

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 26 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.

For more information please visit our website at www.ipc.be.

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