



ENCUESTA A CLIENTES DE COMERCIO ELECTRÓNICO TRANSFRONTERIZO – 2018

El objetivo de la encuesta es entender las preferencias y experiencias del consumidor con el comercio electrónico en relación con la prestación de servicios transfronterizos. También se incluyen tendencias basadas en los resultados de los 25 países que fueron incluidos en la encuesta de 2016, 2017 y 2018.

Fuente: Interational Postal Corporation - IPC

2019



MARKET INTELLIGENCE

International **Post**
Corporation

CROSS-BORDER E-COMMERCE SHOPPER SURVEY 2018

Key Findings



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20 pages
January 2019



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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 2018 IPC Cross-Border E-Commerce Shopper Survey. This year, our survey has been extended to research over 33,500 consumers in 41 different countries, including IPC member countries, Brazil, Russia, India and China as well as Hong Kong, Indonesia, Japan, Latvia, Malaysia, Mexico, Philippines, Saudi Arabia, Singapore, Slovenia, South Korea, Thailand and Vietnam. The expansion in Southeast Asia was made possible through a partnership with the Asia Pacific Post (APP).

The 2018 IPC Cross-border E-commerce Shopper Survey is to our knowledge, the most extensive research project of its kind. Its objectives are to understand consumer preferences and experiences in relation to the delivery of cross-border e-commerce items. Also included within this year's report are trends based on the results of the 25 countries which were included in the survey in 2016, 2017 and 2018.

Each year the survey questionnaire is reviewed by IPC in cooperation with research experts from its members. This year, a new topic of sustainability was added to assess consumer interest in both sustainable packaging and delivery. The research took place in October 2018 and the analysis and reporting was conducted by IPC.

In 2018, our analysis shows that consumer preference for shopping on smartphones has risen sharply in the past two years. Of the parcels bought cross-border in 2018, 38% were purchased from China. Overall, the most popular e-retailers for cross-border purchases were Amazon (23%), Alibaba (16%), eBay (14%) and Wish (10%). The majority (84%) of cross-border parcels weighed up to 2kg (4.4lb), of which 9% weighed less than 100g (3.5oz), and 40% of goods purchased cross-border cost less than €25.

The expansion into Southeast Asia has shown that Asian consumers are younger and more demanding than their counterparts in Europe and the Americas. However, 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.

This public report of the 2018 IPC Cross-Border E-Commerce Shopper Survey provides a high-level selection of the key findings. In addition to this, IPC members can log onto the IPC website to download a comprehensive report comparing all 41 markets surveyed and can also download individual country reports with consumer responses specific to each market.

IPC will continue to work in partnership with its members, other postal operators and organisations to expand the survey to new markets in the coming years. I believe that understanding developments in consumer cross-border preferences and experiences is crucial for postal operators to develop and improve their delivery services to meet the needs of global consumers and e-retailers.

KEY FIGURES



Alibaba (16%), eBay (14%)
and Wish (10%)



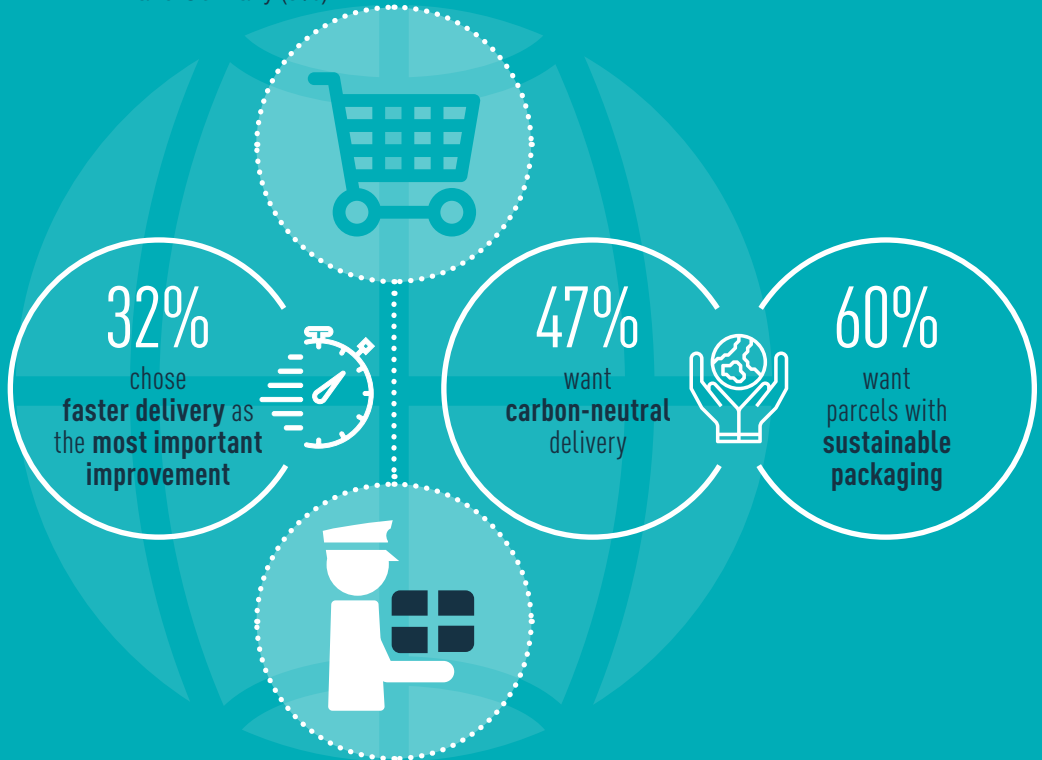
USA (15%), UK (10%)
and Germany (9%)



Online survey
15-minute questionnaire

41 countries surveyed

33,589 online cross-border consumers responded



CONSUMER PREFERENCES



The first section of the key findings relates to the preferences of the consumers when shopping online.

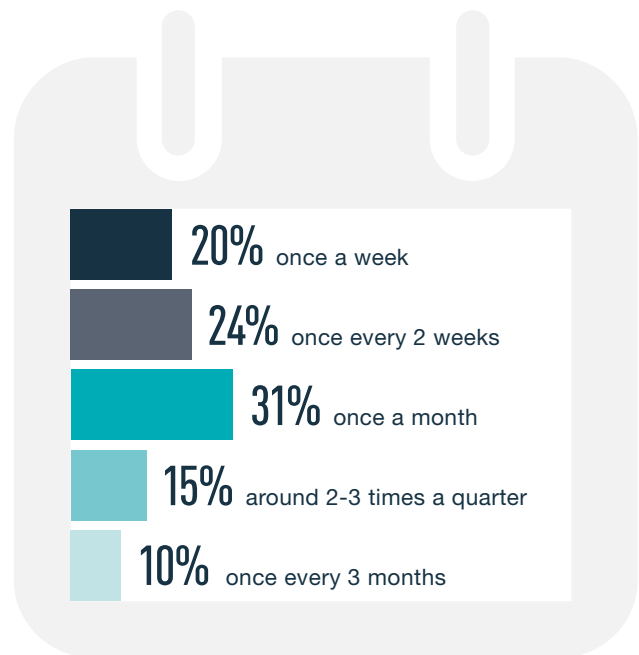
To qualify for the survey each consumer had to have purchased physical goods online at least once in the last three months and to have made at least one cross-border online purchase in the last twelve months.

Frequency of online shopping

Based on research undertaken with consumers in 41 countries around the world, a fifth (20%) of respondents shopped online on average once a week.

At a country level, respondents in Asian markets and the US shopped most regularly online, while those in Europe were the least frequent online shoppers.

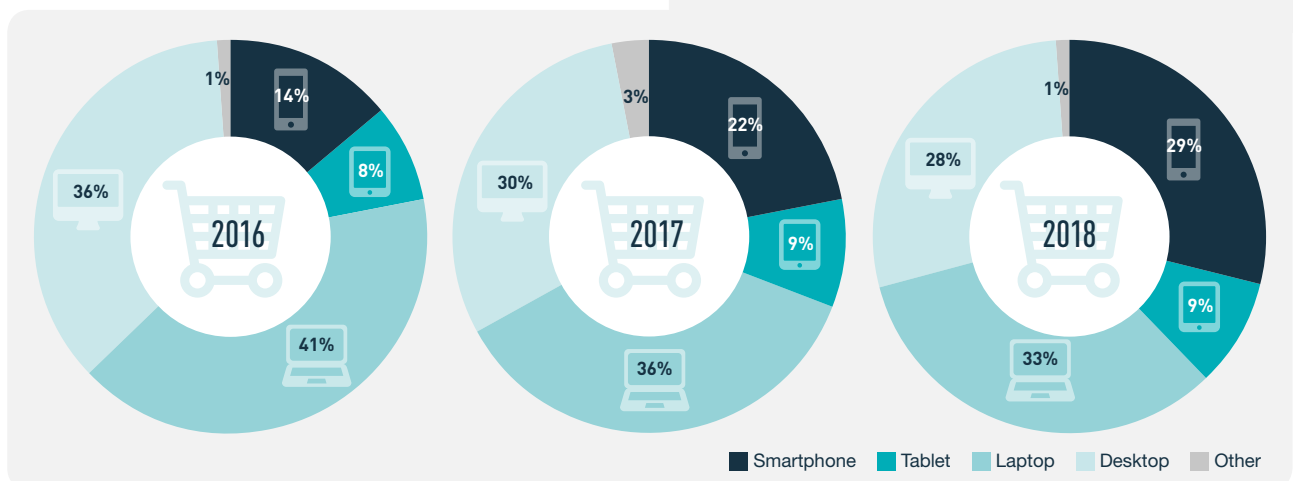
Question: Over the past 12 months, on average how often have you purchased physical goods online (excluding purchasing groceries)?
Sample: 33,589 (all respondents)



Preferred device

Based on the 41 countries in the survey in 2018, the most popular device used to shop online was a smartphone (33%), followed by laptop (31%) and desktop (27%). The preferred device in 2018 was the smartphone, which is due to its popularity in emerging markets.

When comparing the 25 trend countries included in the survey in 2016, 2017 and 2018, the preference for shopping on a smartphone has increased from 14% in 2016 to 29% in 2018, as shown in the graphs below.



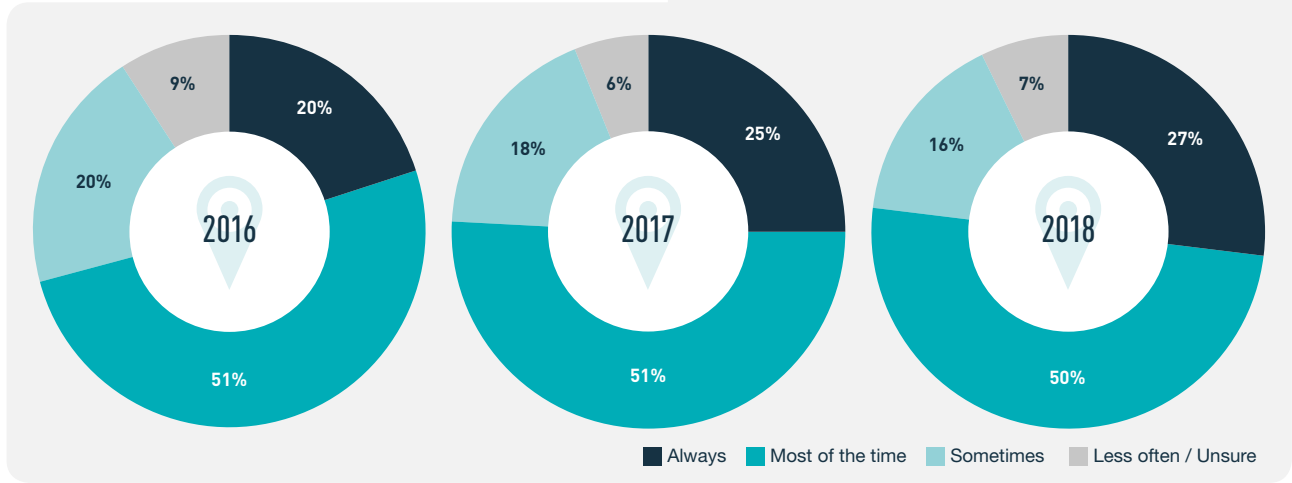
Question: Which is your preferred device when placing an order?
Sample: 33,589 (all respondents)



Parcel tracking

When asked to consider their online shopping experiences over the past 12 months, 30% of consumers stated that parcel tracking was 'always' offered to them, 47% said that it was offered 'most of the time', and 16% said 'sometimes'. Five percent said that it was 'rarely' or 'never' offered.

When analysing results for the 25 trend countries, the proportion who always are offered tracking has increased from 20% to 27% in the past two years, while the proportion who are sometimes offered tracking has decreased from 20% to 16%, as shown in the graphs below.

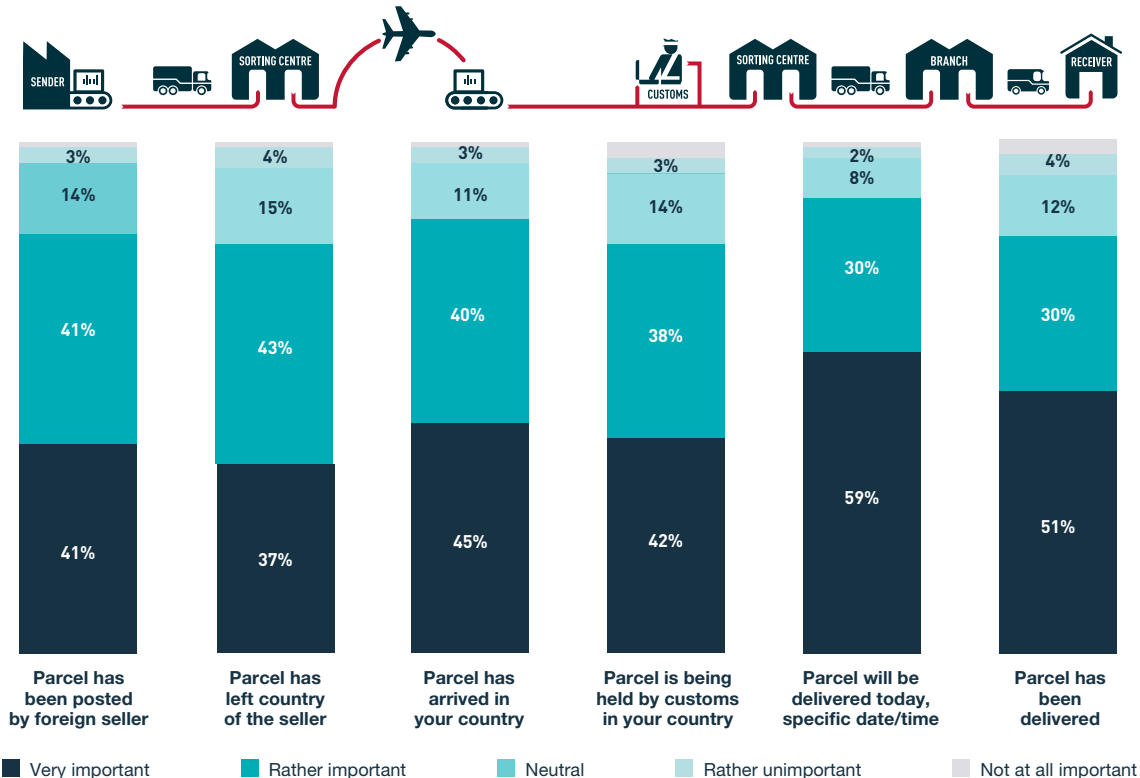


Question: Considering your online shopping experiences of the past 12 months, how often has parcel tracking been offered to you?
Sample: 33,589 (all respondents)

Cross-border parcel tracking

When asked for the level of importance of their item being tracked cross-border at certain key stages, the level was high for all six stages measured. 'Very / rather important' ranged

from 80% up to 89% for each of these stages. Information that the 'parcel will be delivered today, at a specific date/time' had the highest level of importance of all delivery stages tested, being considered 'very important' by 59% of respondents.



Question: For each of the below stages of an online cross-border purchase journey, please rate how important it is for you to be informed that a parcel is at each stage?
Sample: 33,589 (all respondents)



Delivery locations used in the past year

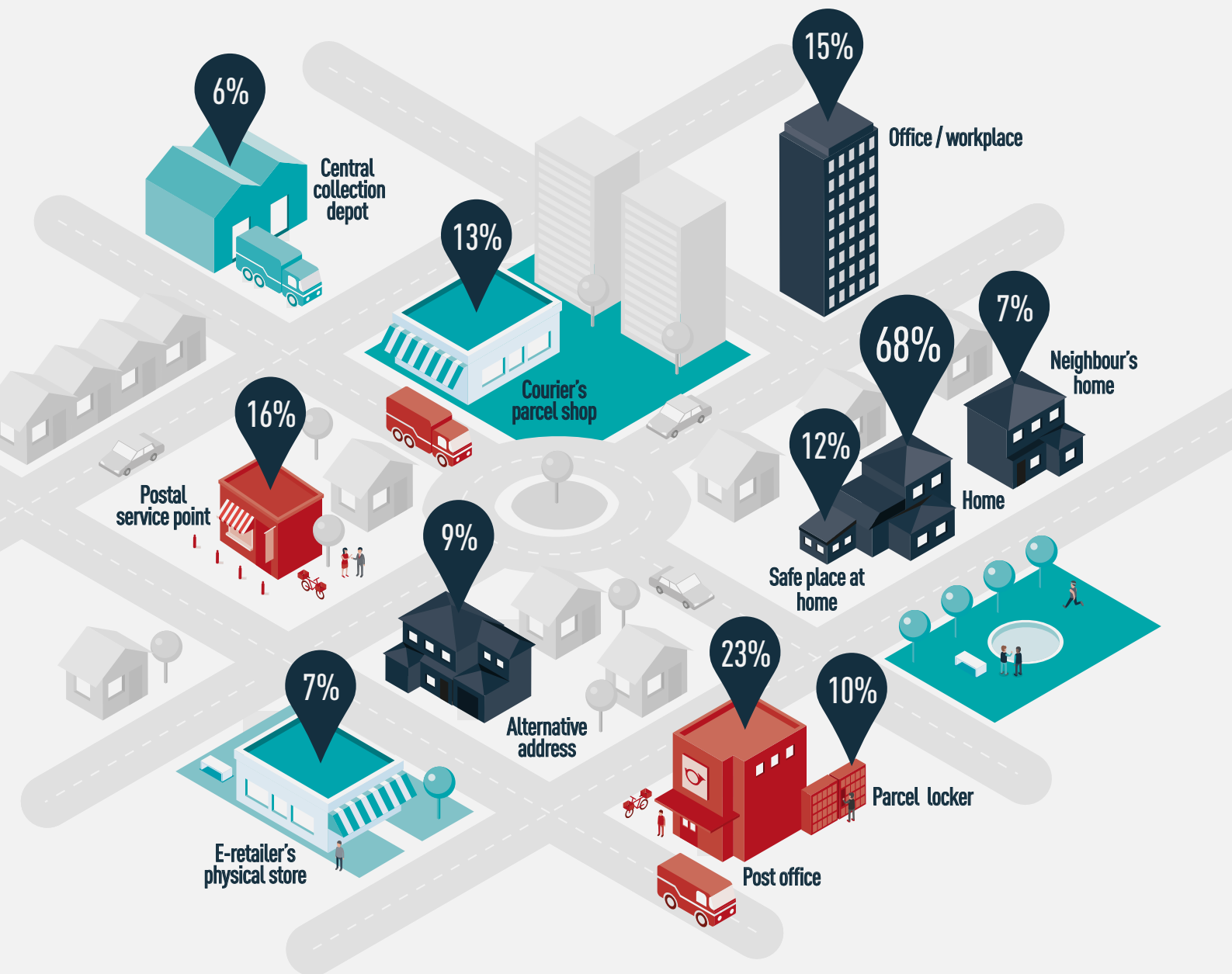
Delivery at home was the most commonly used delivery location at 68%, and ranged from 86% in the Netherlands to 30% in Russia.

Delivery to a post office was the next most commonly used (23%), and was highest in Russia (74%), Iceland (62%) and Latvia (61%).

A postal service point (16%) was most popular in the Nordic countries – Sweden (67%), Norway (67%), Finland (56%) and Denmark (45%).

A courier's parcel shop (13%) was most popular in France (46%), followed by Denmark (29%).

A parcel locker station (10%) was most commonly used in Finland (40%), Denmark (36%), Latvia (35%) and China (32%).

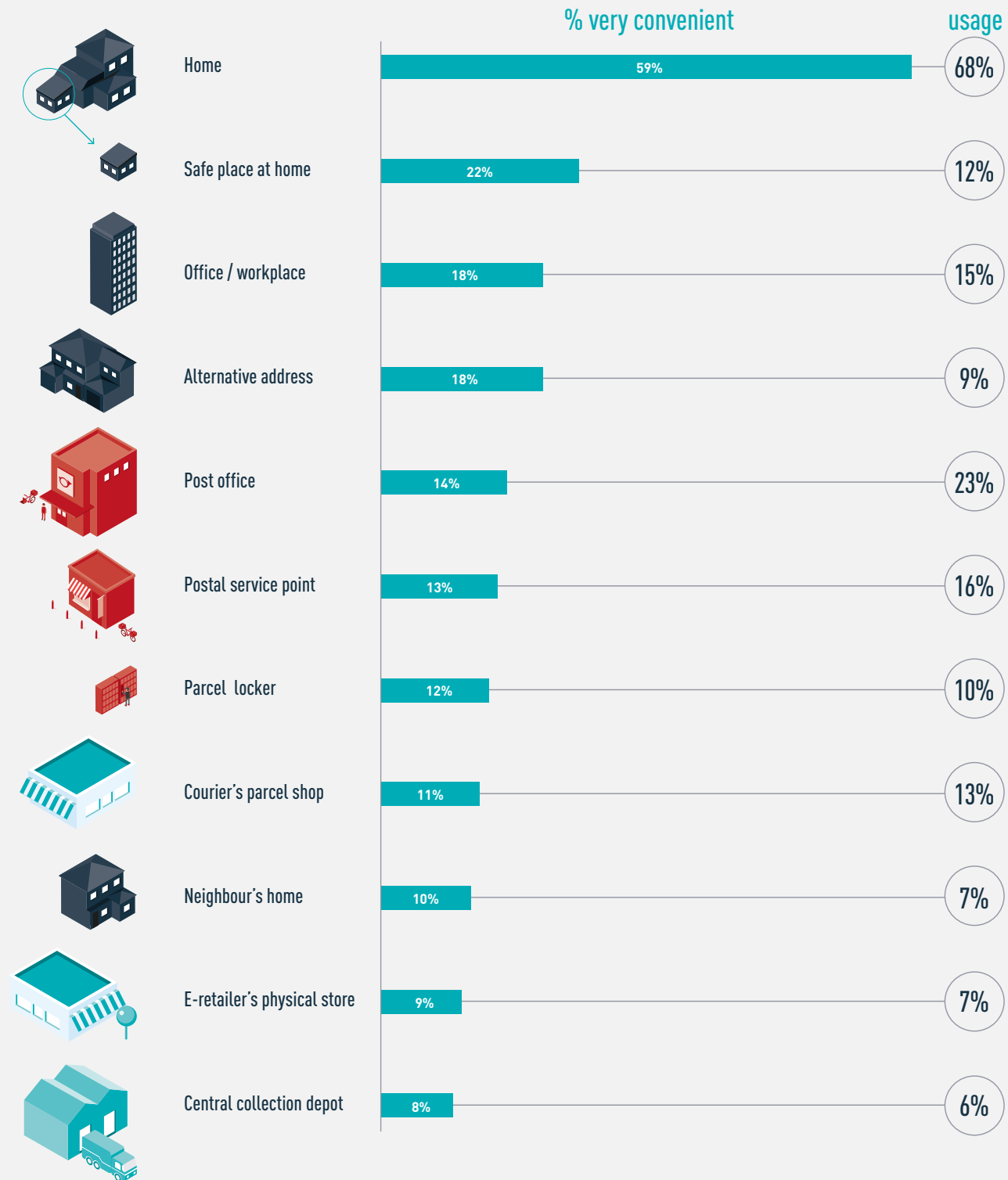


Question: Considering your online shopping experiences of the past 12 months, where have you had your parcels delivered to?
Sample: 33,589 (all respondents)

Delivery location convenience

Consumers were asked to assess the convenience of delivery locations. The most convenient delivery location was home (59% very convenient), followed by a safe place at home (22%), office / workplace (18%) and an alternative address (18%).

When comparing convenience to usage, alternative delivery locations (an office, safe place at home or alternative address) are preferred by the consumer but are rarely used. On the other hand, delivery to a post office was the second most commonly used, but as a delivery location ranked only fifth in terms of consumer preference.



Question: For each of the following delivery locations, please indicate how convenient it is for you to have your parcels delivered there?
 Sample: 33,589 (all respondents)

SUSTAINABILITY

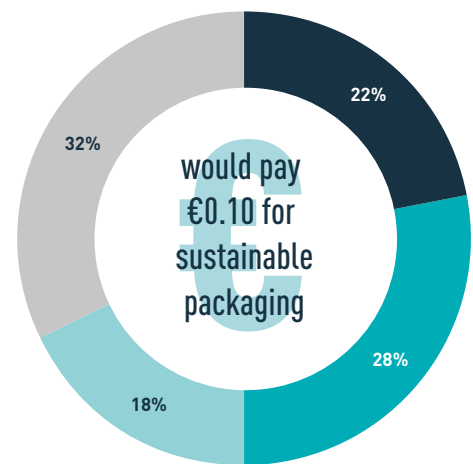
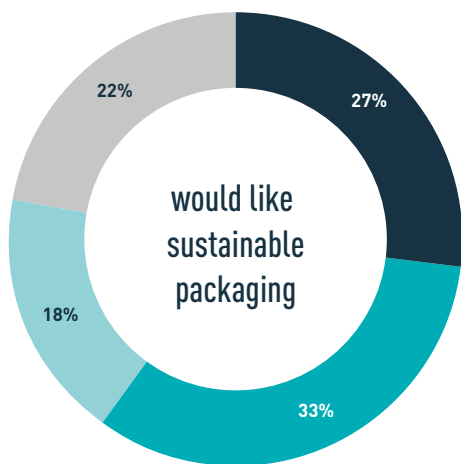


For this year's survey, IPC added new questions to research consumer attitudes towards online shopping in a sustainable manner.

Packaging

The survey found that 27% of respondents strongly 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, 22% of consumers strongly agreed.

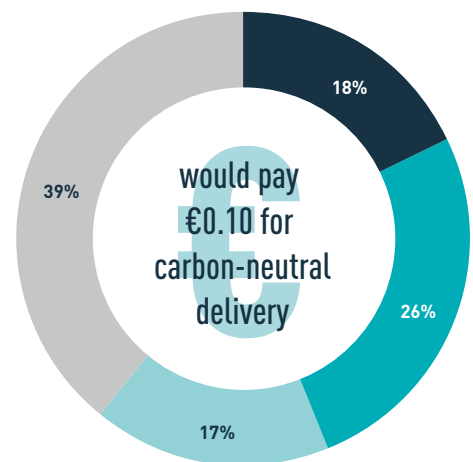
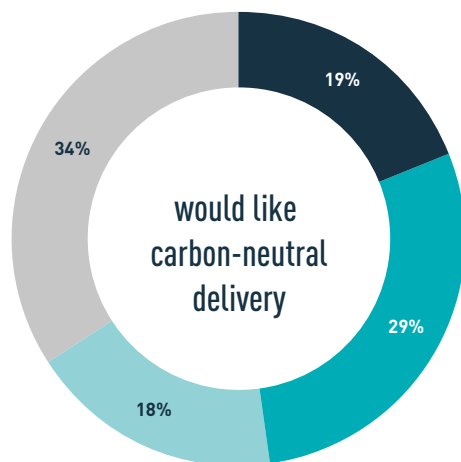


■ Strongly agree ■ Agree ■ Somewhat agree ■ Disagree

Delivery

Concerning the delivery, 19% strongly agreed that they would like the delivery of their parcels to be carbon-neutral.

When asked if they would be willing to pay €0.10 for carbon-neutral delivery, 18% of respondents strongly agreed.



■ Strongly agree ■ Agree ■ Somewhat agree ■ Disagree

Question: To what extent do you agree with the following statements on the topic of sustainability?
Sample: 33,589 (all respondents)



COUNTRY OF MOST RECENT PURCHASE



| CANADA | |
|--------|-----|
| US | 53% |
| China | 30% |
| UK | 4% |

| US | |
|--------|-----|
| China | 57% |
| UK | 10% |
| Canada | 6% |

| MEXICO | |
|--------|-----|
| US | 43% |
| China | 35% |
| Japan | 4% |

| BRAZIL | |
|--------|-----|
| China | 62% |
| US | 23% |
| Japan | 3% |

| RUSSIA | |
|---------|-----|
| China | 83% |
| US | 5% |
| Germany | 2% |

| THAILAND | |
|----------|-----|
| China | 52% |
| Japan | 14% |
| US | 7% |

| HONG KONG | |
|-----------|-----|
| China | 37% |
| US | 21% |
| Japan | 16% |

| VIETNAM | |
|---------|-----|
| US | 26% |
| China | 25% |
| Japan | 17% |

| MALAYSIA | |
|-------------|-----|
| China | 63% |
| US | 7% |
| South Korea | 4% |

| SINGAPORE | |
|-------------|-----|
| China | 43% |
| US | 20% |
| South Korea | 8% |

| CHINA | |
|-----------|-----|
| Japan | 23% |
| US | 14% |
| Hong Kong | 12% |

| SOUTH KOREA | |
|-------------|-----|
| US | 48% |
| China | 15% |
| Japan | 13% |

| JAPAN | |
|-------------|-----|
| China | 29% |
| US | 29% |
| South Korea | 12% |

| PHILIPPINES | |
|-------------|-----|
| China | 39% |
| US | 23% |
| South Korea | 7% |

| INDONESIA | |
|-----------|-----|
| China | 41% |
| US | 10% |
| Singapore | 10% |

| SINGAPORE | |
|-------------|-----|
| China | 43% |
| US | 20% |
| South Korea | 8% |

| SAUDI ARABIA | |
|--------------|-----|
| China | 46% |
| US | 20% |
| UAE | 10% |

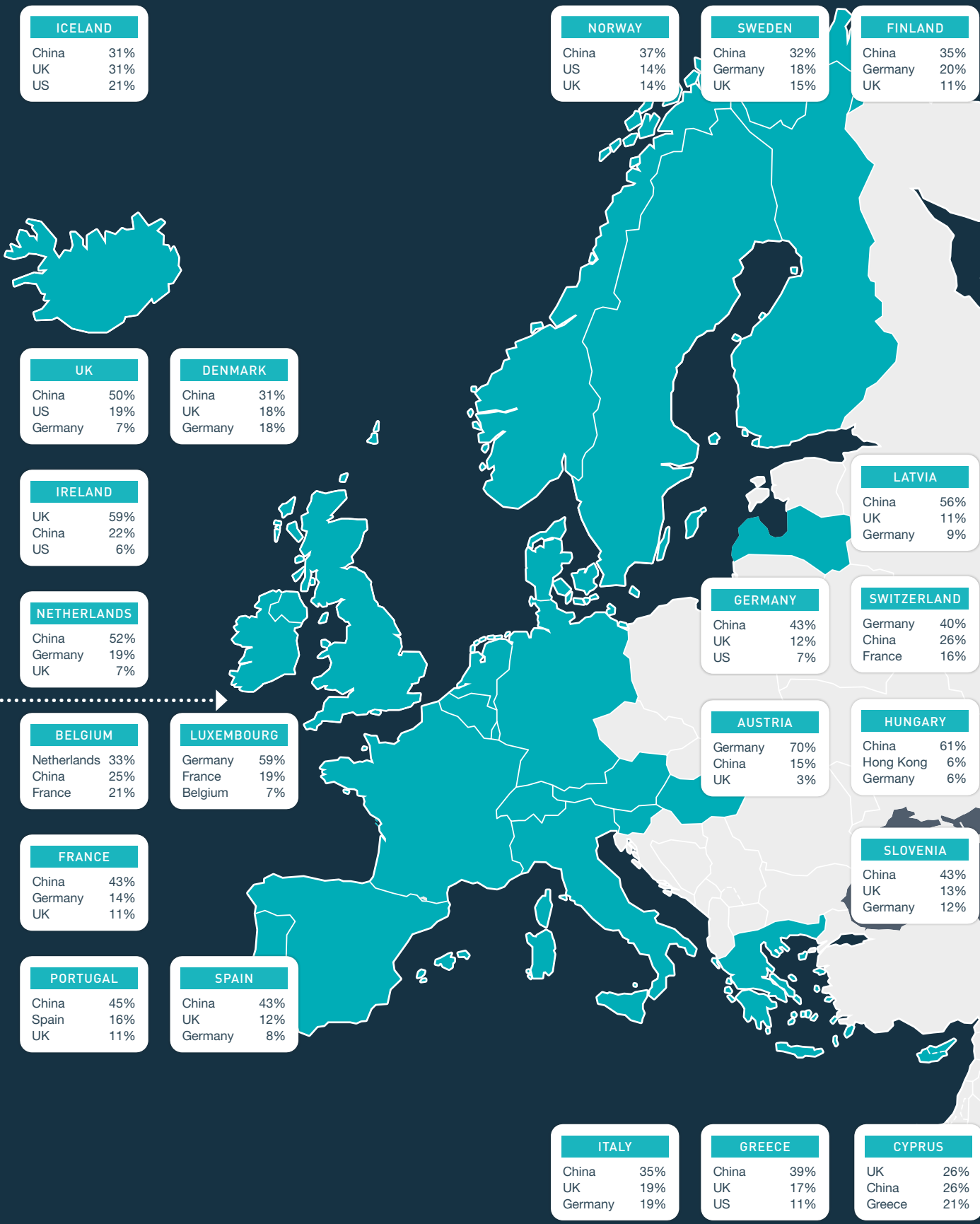
| INDIA | |
|-----------|-----|
| US | 26% |
| China | 23% |
| Australia | 8% |

| AUSTRALIA | |
|-----------|-----|
| China | 40% |
| US | 21% |
| UK | 14% |

| NEW ZEALAND | |
|-------------|-----|
| China | 33% |
| Australia | 22% |
| US | 19% |

Question: Please specify the country from which you bought your most recent online cross-border purchase?
 Sample: 33,589 (all respondents)





PRODUCT CHARACTERISTICS

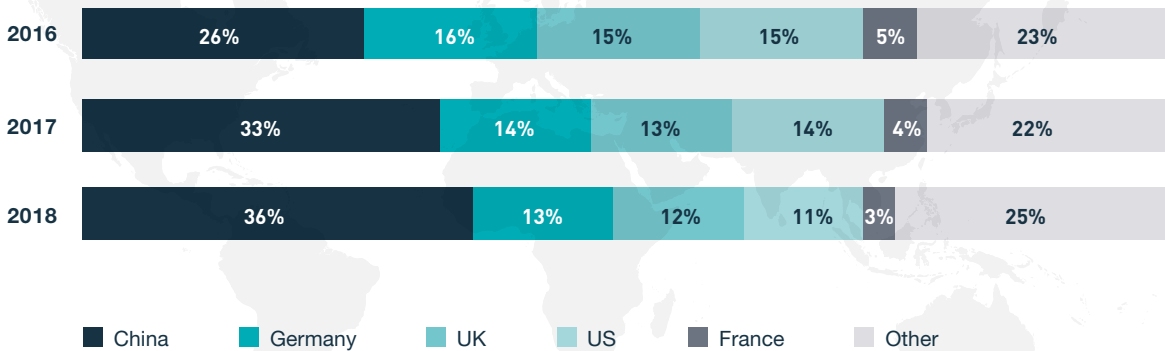


Export country

At overall level, China accounted for 38% of most the recent cross-border purchases. This was 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%.

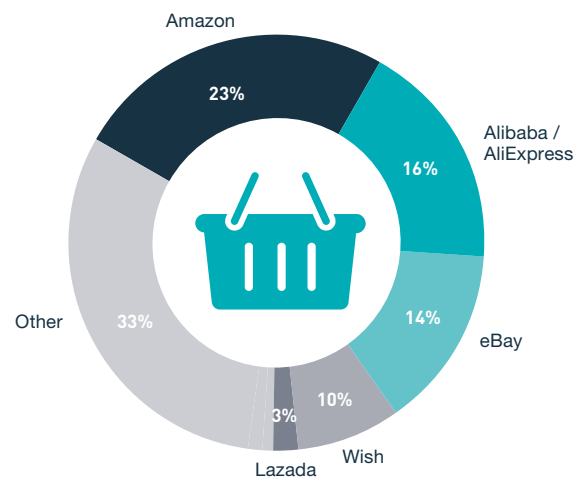
When comparing the 25 trend countries, China's share has increased year-on-year. It rose by 7% in 2017 and by 3% in 2018. On the other hand, the other four largest countries have all slightly decreased in share over the past two years. The US share notably declined by 3% in 2018.

25
trend
countries



E-retailer

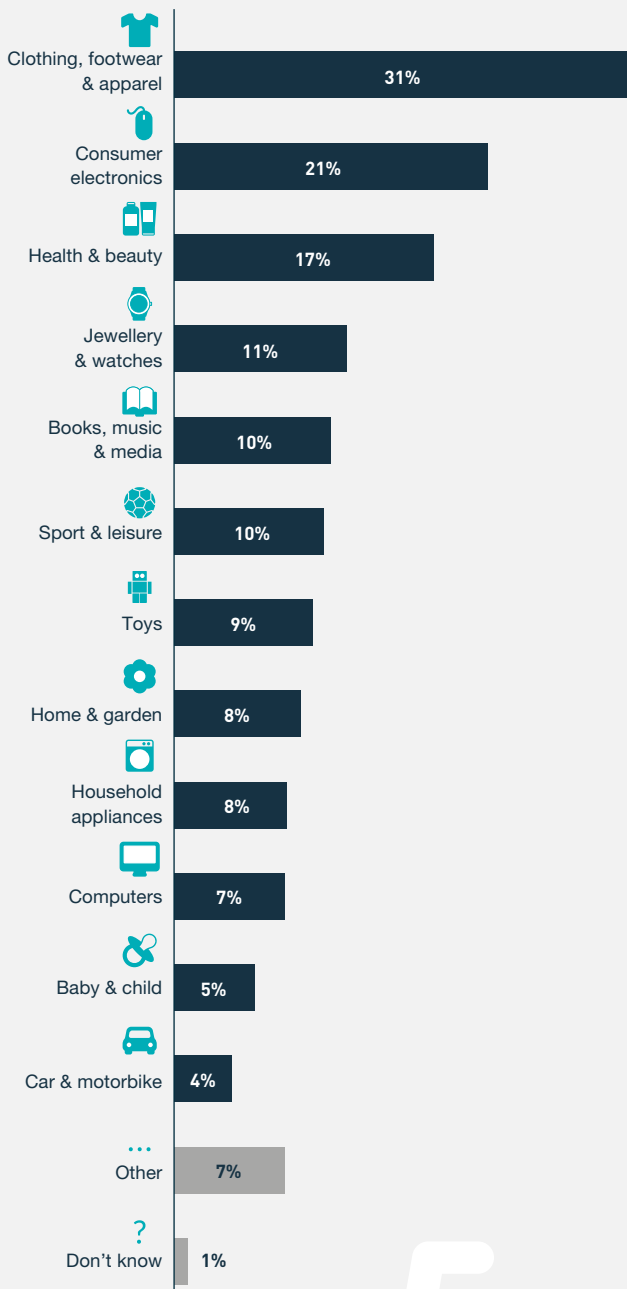
Based on the 41 markets surveyed, Amazon, Alibaba / AliExpress, eBay and Wish accounted for 64% of the most recent cross-border e-commerce items purchased.



Question: Please identify which retailer you bought this particular purchase from?
Sample: 33,589 (all respondents)

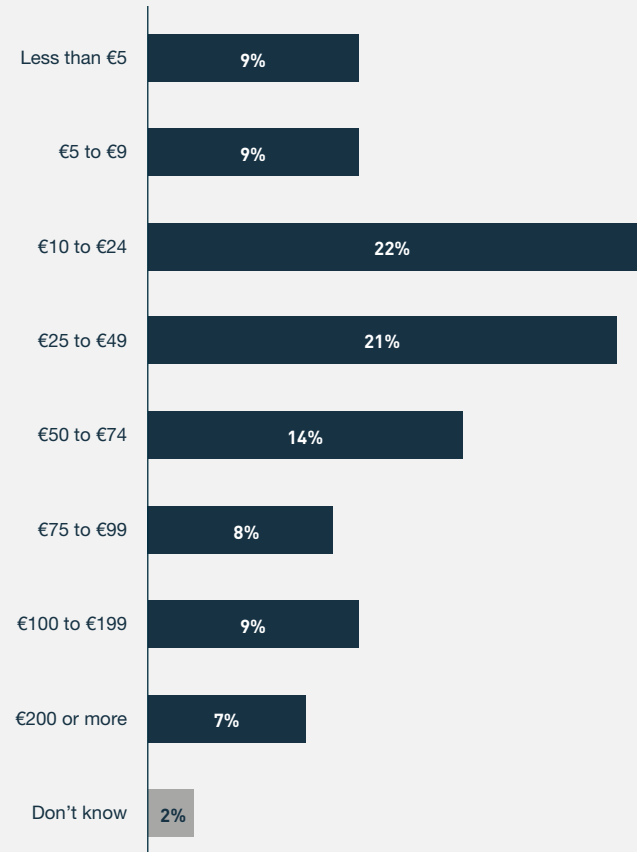


Product category



Product value

Forty percent of the most recent cross-border purchases cost less than €25, 21% cost €25 to €49 and 14% cost €50 to €74. Cross-border purchases costing €100 or more accounted for 16% of responses.



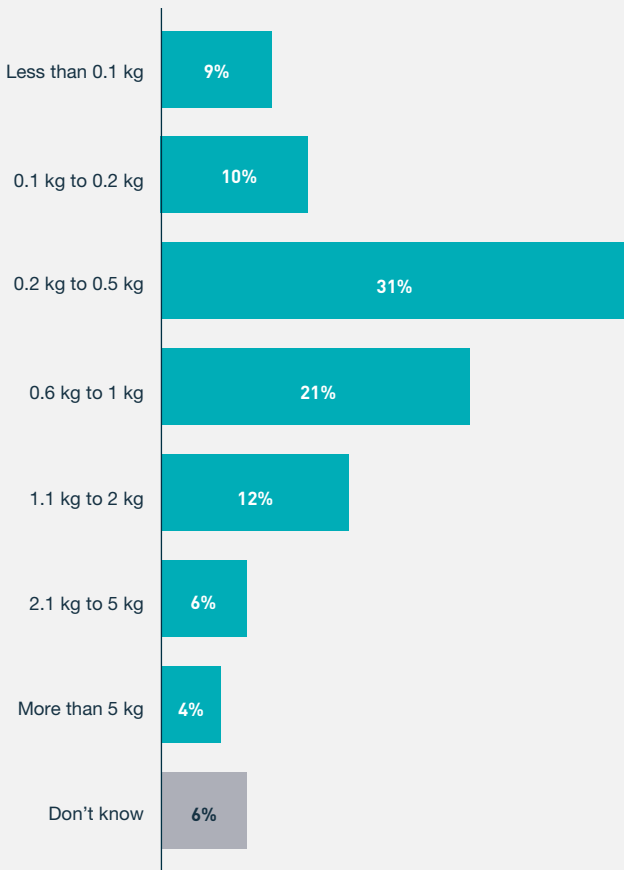
Question: For this particular parcel, please specify what category of goods you purchased? (Multiple answers possible)
Sample: 33,589 (all respondents)

Question: Please specify the approximate cost of the goods within this particular purchase?
Sample: 33,589 (all respondents)

Parcel weight

The survey showed that the 84% of cross-border goods bought online were classified under UPU terminology as packets as they weighed up to 2kg (4.4lb).

Half of the goods bought cross-border weighed up to 500g (18oz).



Parcel dimensions

Respondents were asked whether this parcel would have fitted into their mailbox, regardless of where it was delivered.

The proportion of deliveries that would have fit in the mailbox was highest in the US (72%), Vietnam (70%) and France (65%). It was lowest in Iceland (24%), Luxembourg (26%), Cyprus (27%) and Latvia (28%).

The reasons behind these country differences are:

- Mailbox size: US standard mailboxes are larger than those in most European countries;
- Country differences in product category and weight: consumers buying more small, low-weight items are more likely to be able to use the mailbox for their deliveries.



47% said that this purchase would have fit into their mailbox.



Question: What was the approximate weight of this particular purchase?

Question: Regardless of where it was delivered, would this parcel have been small enough to fit into a mailbox/letterbox?

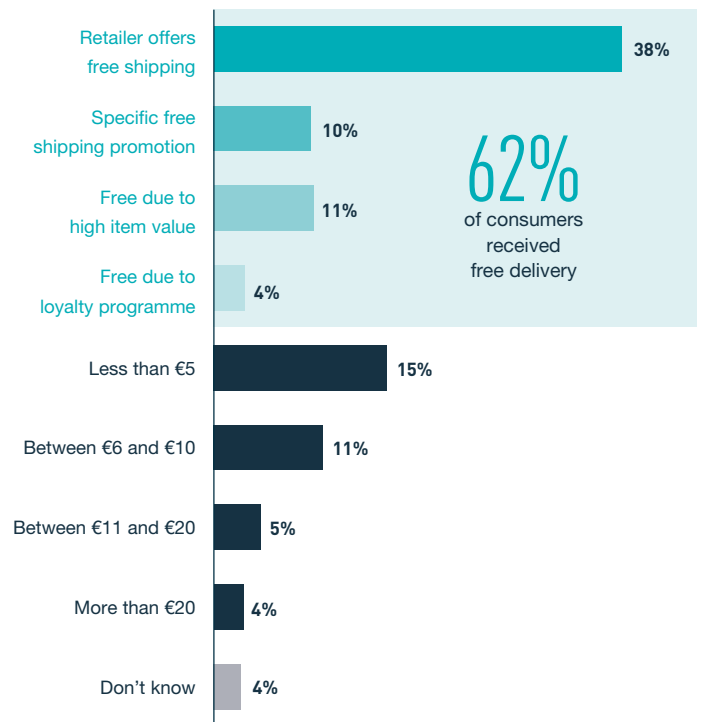
Sample: 33,589 (all respondents)

DELIVERY EXPERIENCE



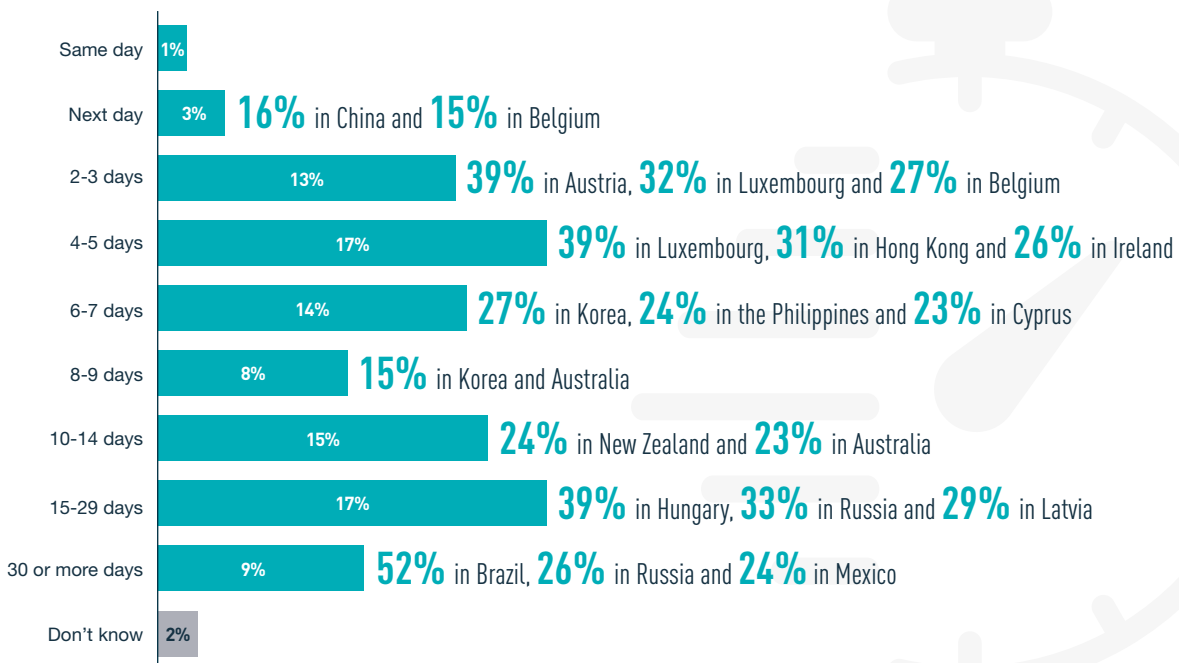
Delivery cost

The study showed that 62% of respondents received free shipping – broken down as 38% due to a retailer offer, 10% due to a promotion (e.g. Black Friday), 11% due to high product value and 4% due to a loyalty programme (e.g. Amazon Prime).



Delivery speed

The study showed that 18% of consumers received their last cross-border delivery within three days and 48% within a week. Depending on the distance travelled, the delivery time varied, with 9% of consumers receiving their deliveries in 30 or more days, although this was most common with consumers in Brazil, Russia and Mexico.



Question: Please specify the shipping cost for this particular purchase?

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

Sample: 33,589 (all respondents)

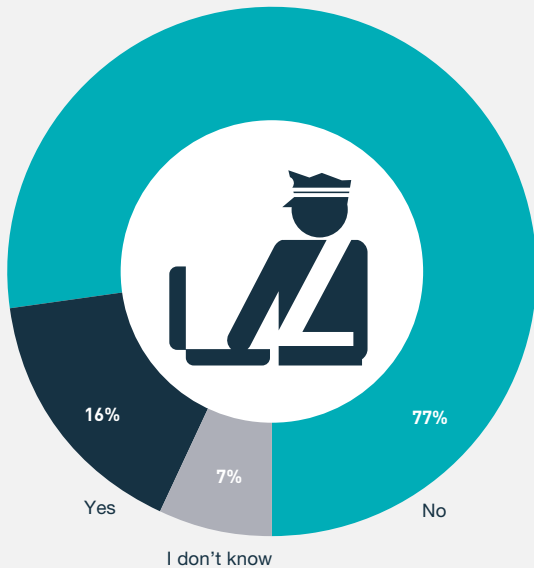
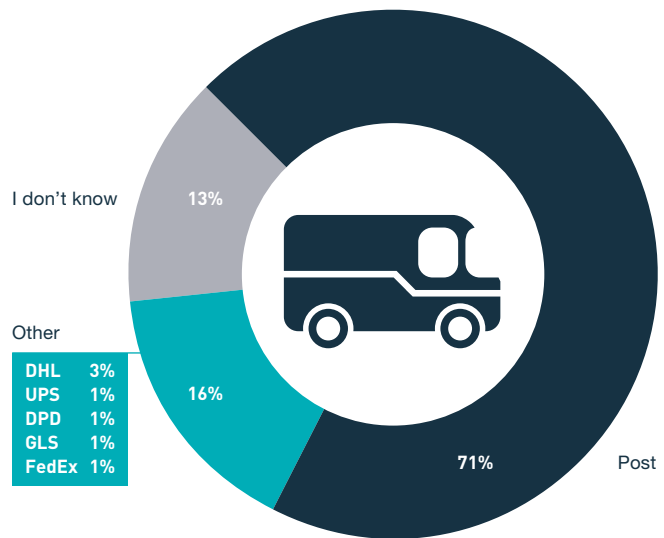


Delivery provider

The post accounted for 71% of most recent cross-border deliveries.

Sixteen percent of deliveries were with other carriers, and 13% of consumers did not know who delivered their parcel.

Within the 'Other' category, respondents were asked to name the delivery company if possible. The most commonly named courier was DHL (3%).



Customs

Sixteen percent of consumers paid customs duty on their most recent purchase. The countries with the highest proportion paying customs fees were Iceland (72%), India (56%), Vietnam (52%) and China (50%). At the other end of the scale were Latvia, Russia, Finland and Belgium (all 4%).

Returns

The total level of cross-border returns was 8%. Country-level results show that the level of cross-border returns was highest in Vietnam (44%), followed by Thailand (29%) and India (28%). At the other end of the scale were Iceland (1%), Latvia (2%) and Russia, Hungary, Norway and Mexico (all 3%).



Question: Was this particular parcel delivered by...?

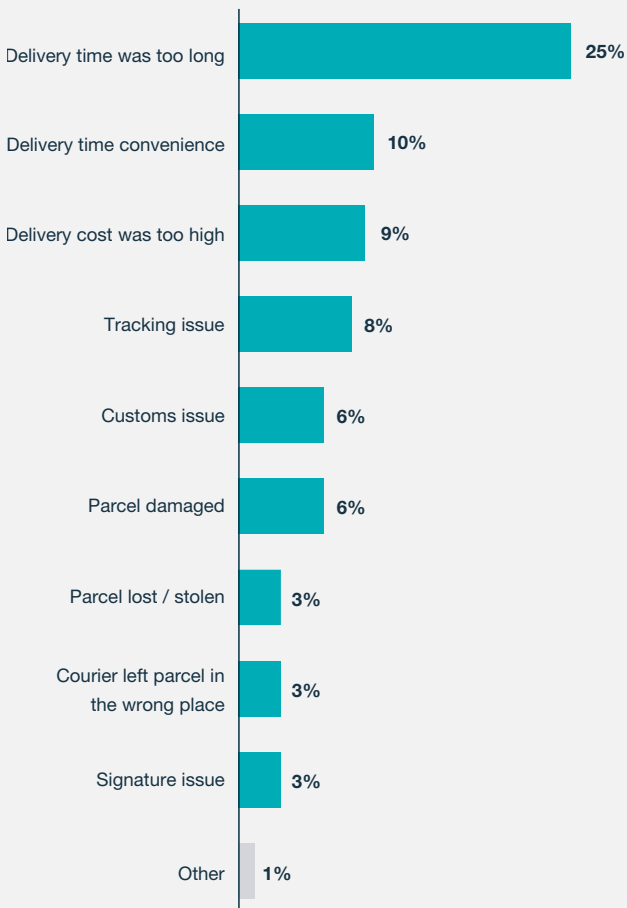
Question: Did you have to pay customs duties / customs clearance fees on this particular purchase?

Question: Did you return this particular parcel?

Sample: 33,589 (all respondents)

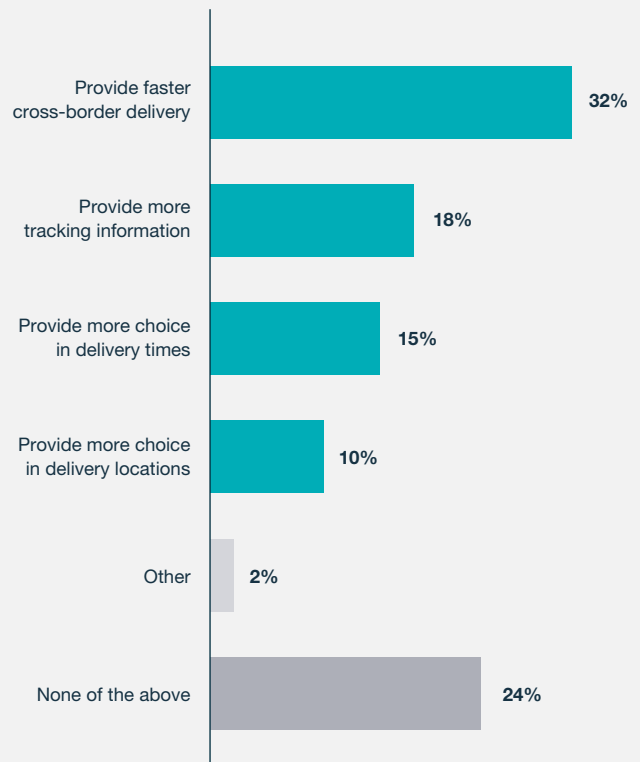
Delivery issues

The most common delivery issue identified by cross-border consumers was that the delivery time was too long.



Improvement areas

When asked what one thing the post should do to improve cross-border delivery, 32% chose faster cross-border delivery.



Question: Please identify any delivery issues you experienced with this particular purchase?

Question: Which one of the following should the post do in order to improve the cross-border delivery experience?

Sample: 33,589 (all respondents)

IPC MARKET INTELLIGENCE



IPC Global Postal Industry Report

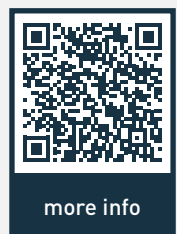
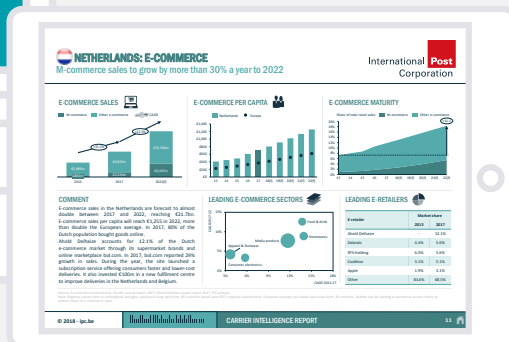
The IPC Global Postal Industry Report is the sector's most comprehensive, holistic and in-depth report on postal industry trends and performance.

- Over 140 pages of industry-specific analysis updated and refreshed each year
- Worldwide coverage of 45 postal operators
- In-depth review and comparison of corporate and business unit performance
- Solid foundation to benchmark performance and better understand industry trends
- 2018 report available for purchase and immediate download



IPC Carrier Intelligence Reports

IPC Carrier Intelligence Reports provide instant access to critical financial, operational, strategic and market information for 50 leading postal and parcel operators from Europe, Asia-Pacific, the Americas and Africa in an easy-to-read, consistent format.



Survey methodology

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*.

* indicates the 25 countries included in the three-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 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).

Access to the full research findings and reports for each of the 41 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 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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