

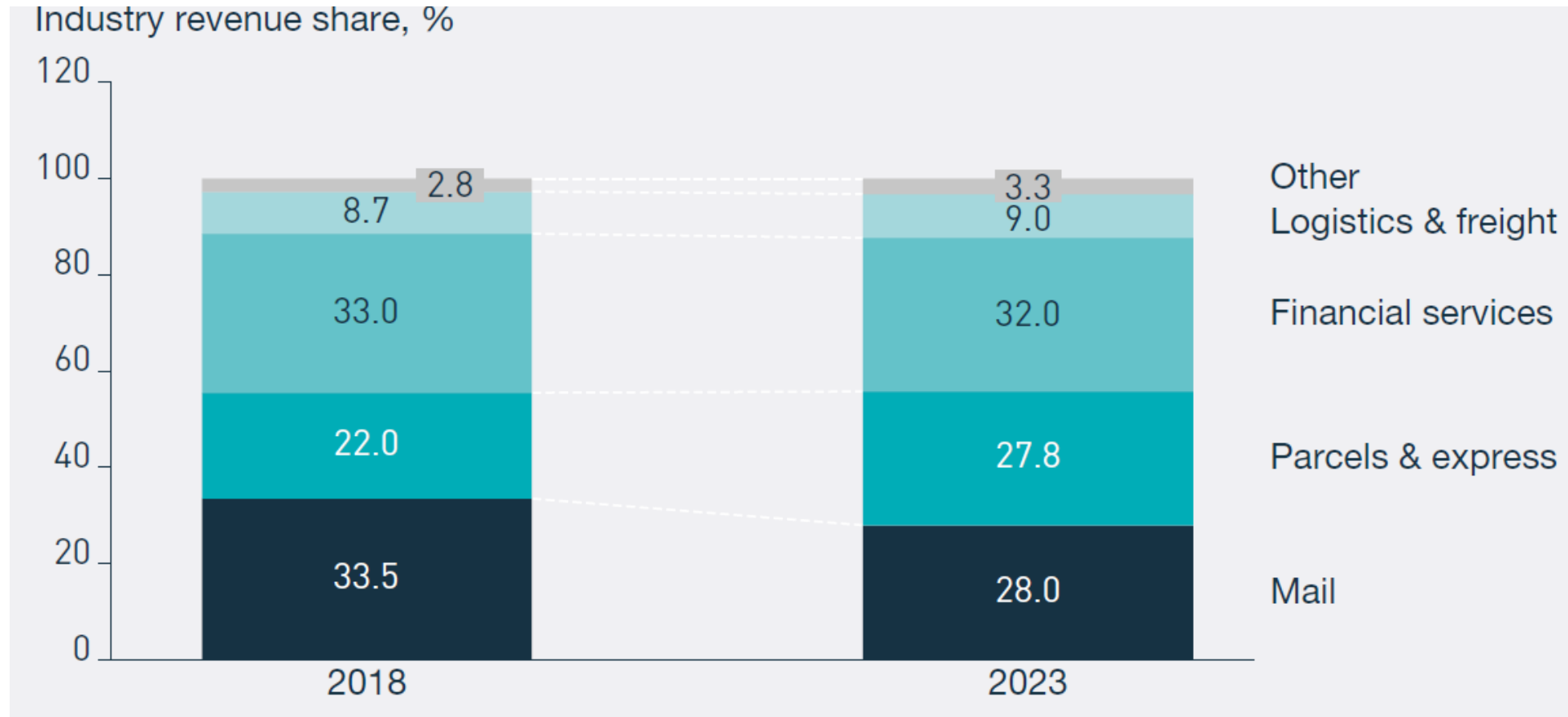
IPC CROSS-BORDER E-COMMERCE SHOPPER SURVEY 2024

Presentation to APPU



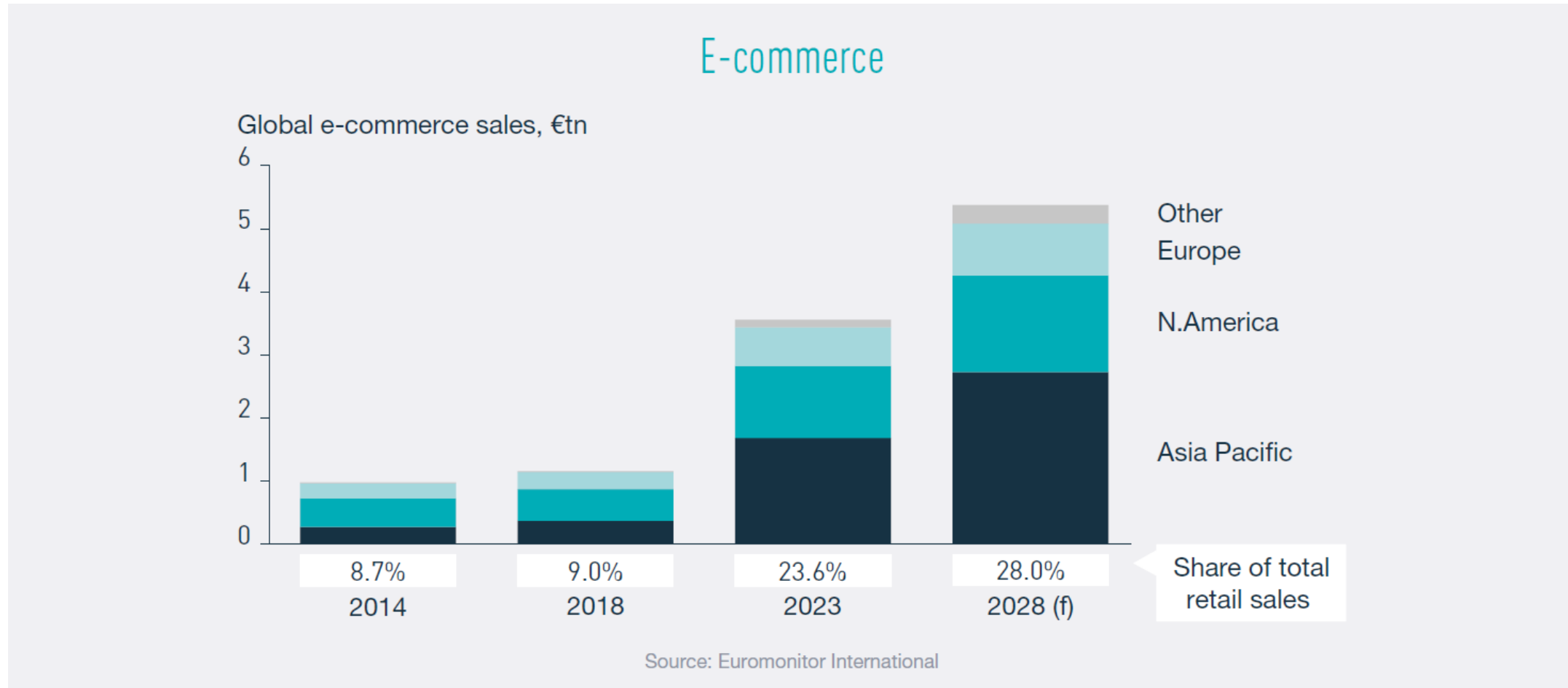
BACKGROUND – INDUSTRY SITUATION

IPC Global Postal Industry Report – Parcels are key to the postal future



BACKGROUND – INDUSTRY SITUATION

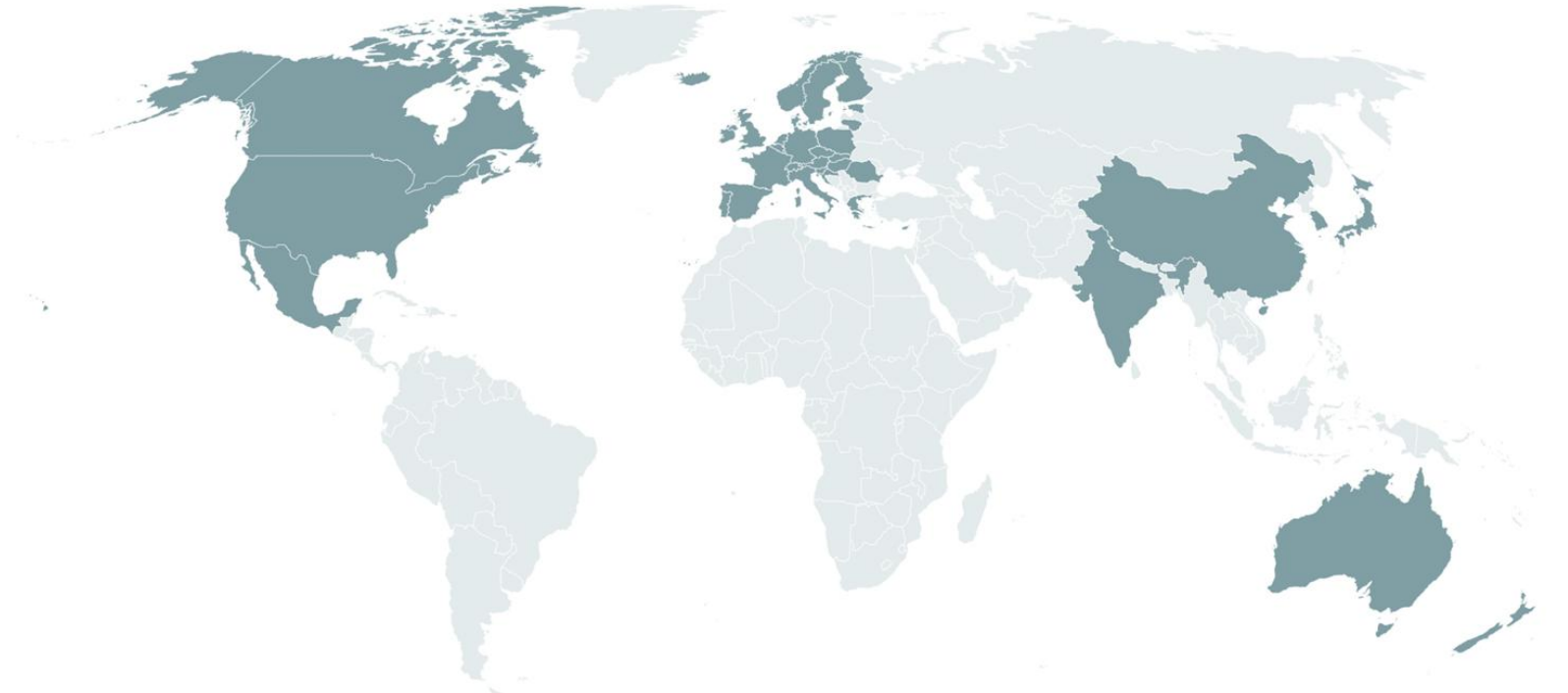
IPC Global Postal Industry Report – Rising e-commerce: more [here](#)



Target group: Consumers who have bought physical goods online at least once in the last three months and made a cross-border online purchase in the past year

Methodology: Online survey with quotas on age and gender per country. Fieldwork took place in September 2024.

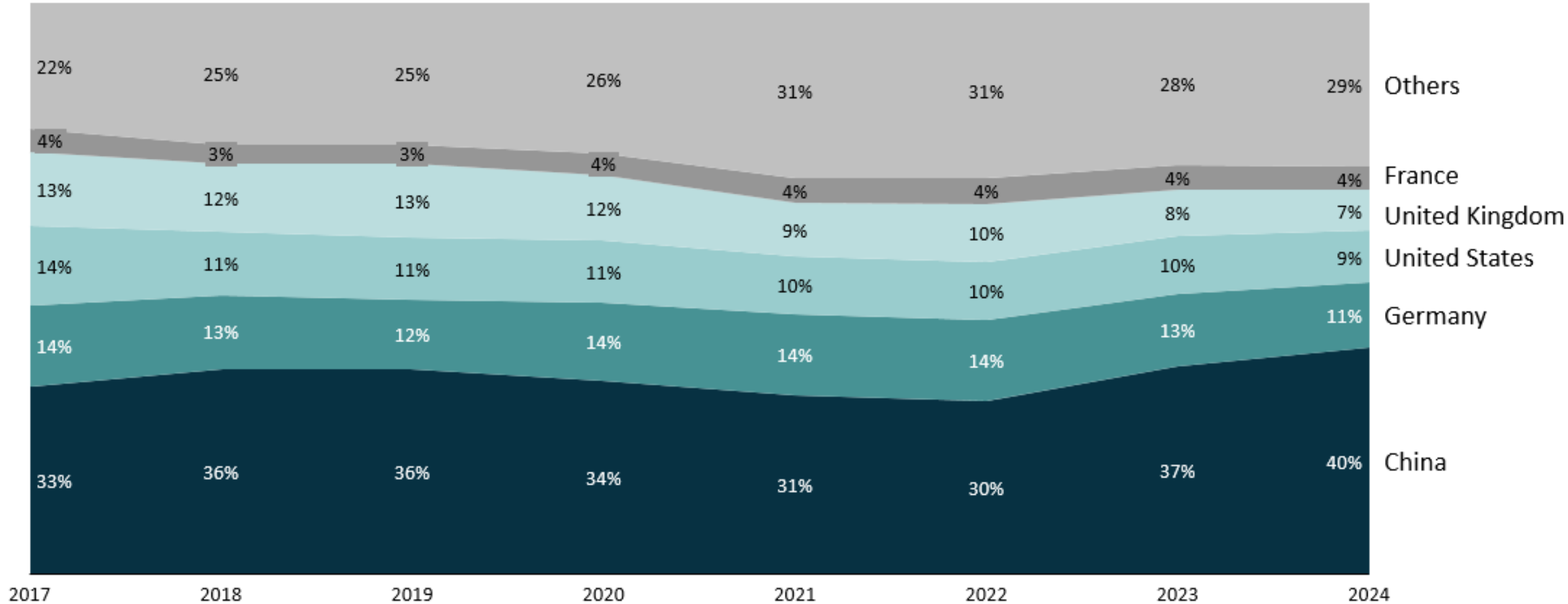
Sample size: 31,000 responses spread across 37 countries.



MOST RECENT CROSS- BORDER PURCHASE

COUNTRY OF PURCHASE: TREND

Sharp rise in purchases from China in 2023 and 2024



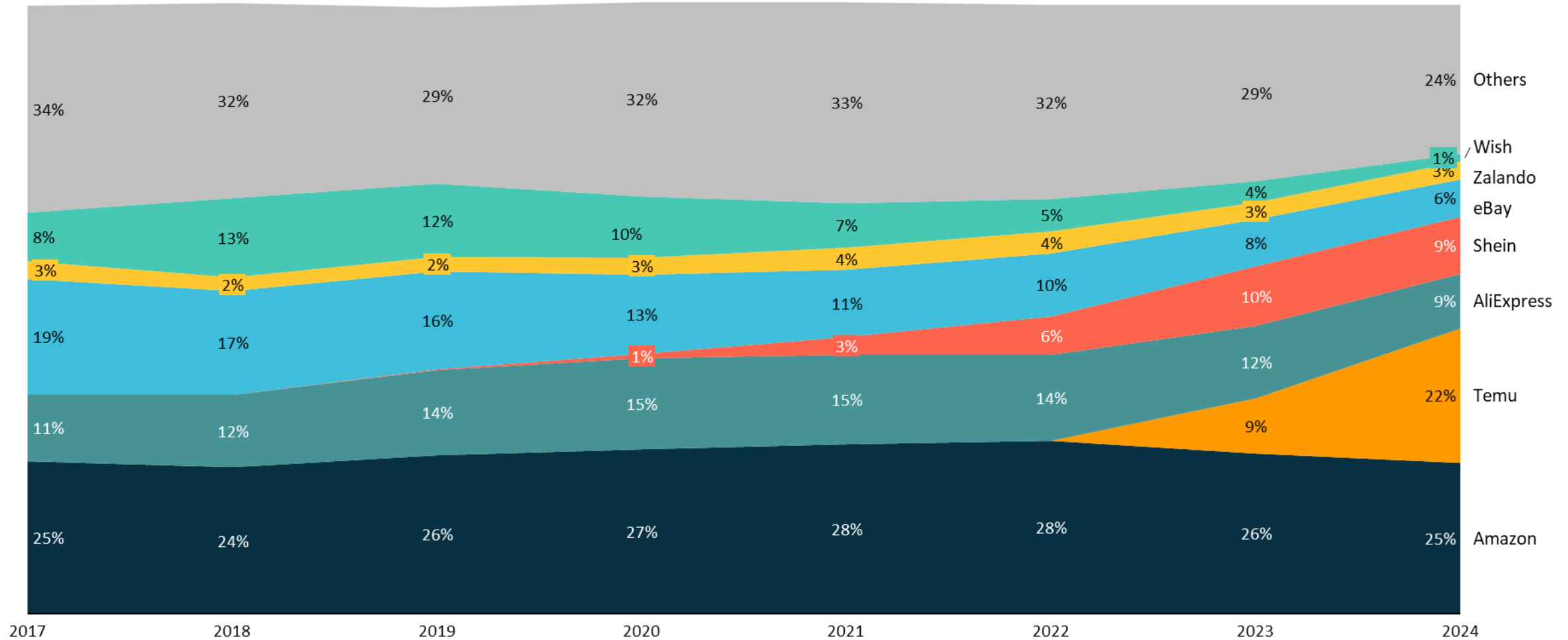
COUNTRY OF PURCHASE: TOP 3 PER COUNTRY

Download the map (and report) from www.ipc.be/shopper



E-RETAILER USED

Temu – already the 2nd biggest cross-border e-retailer

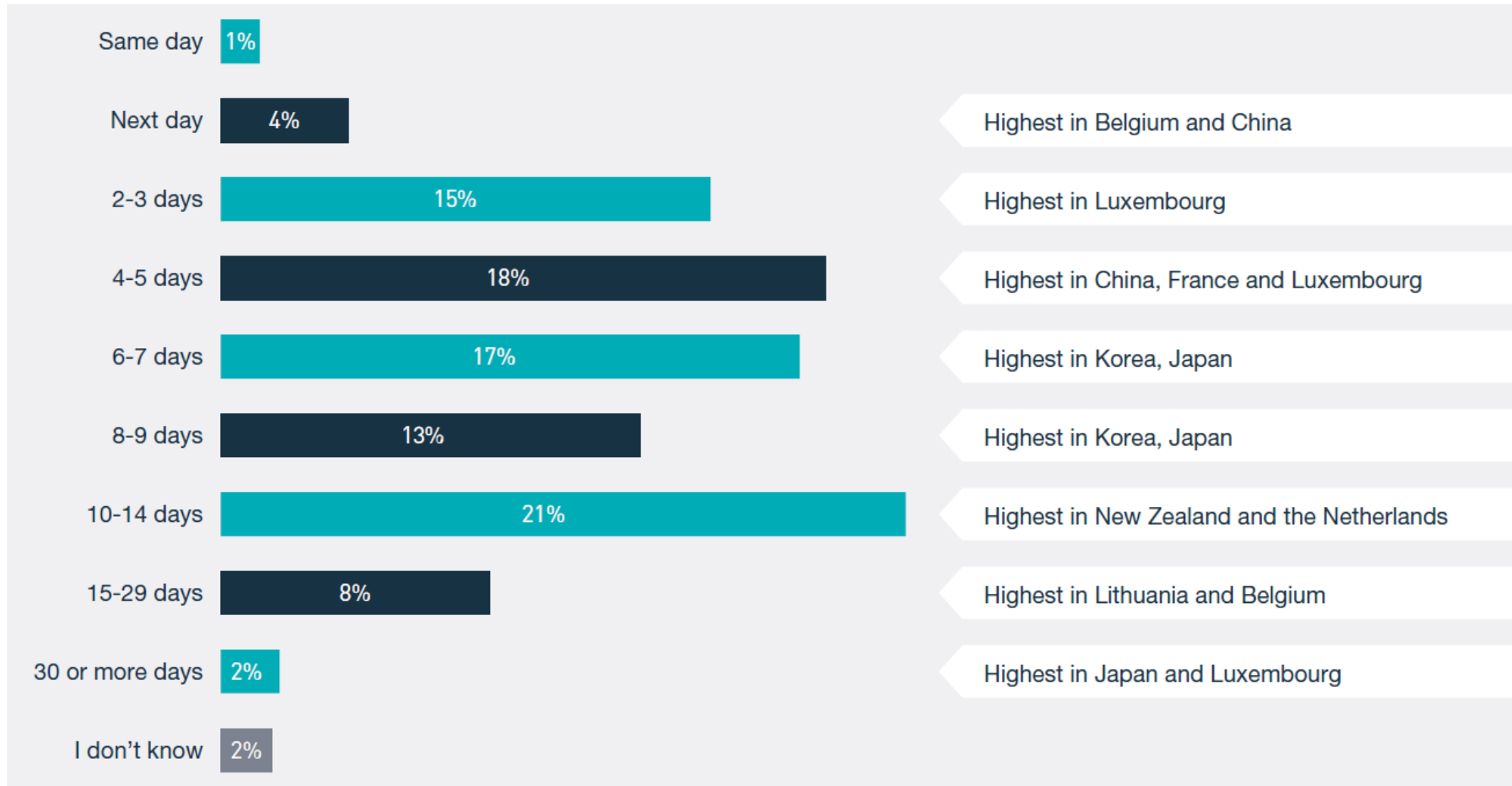


Question: Please identify which retailer you bought this particular purchase from

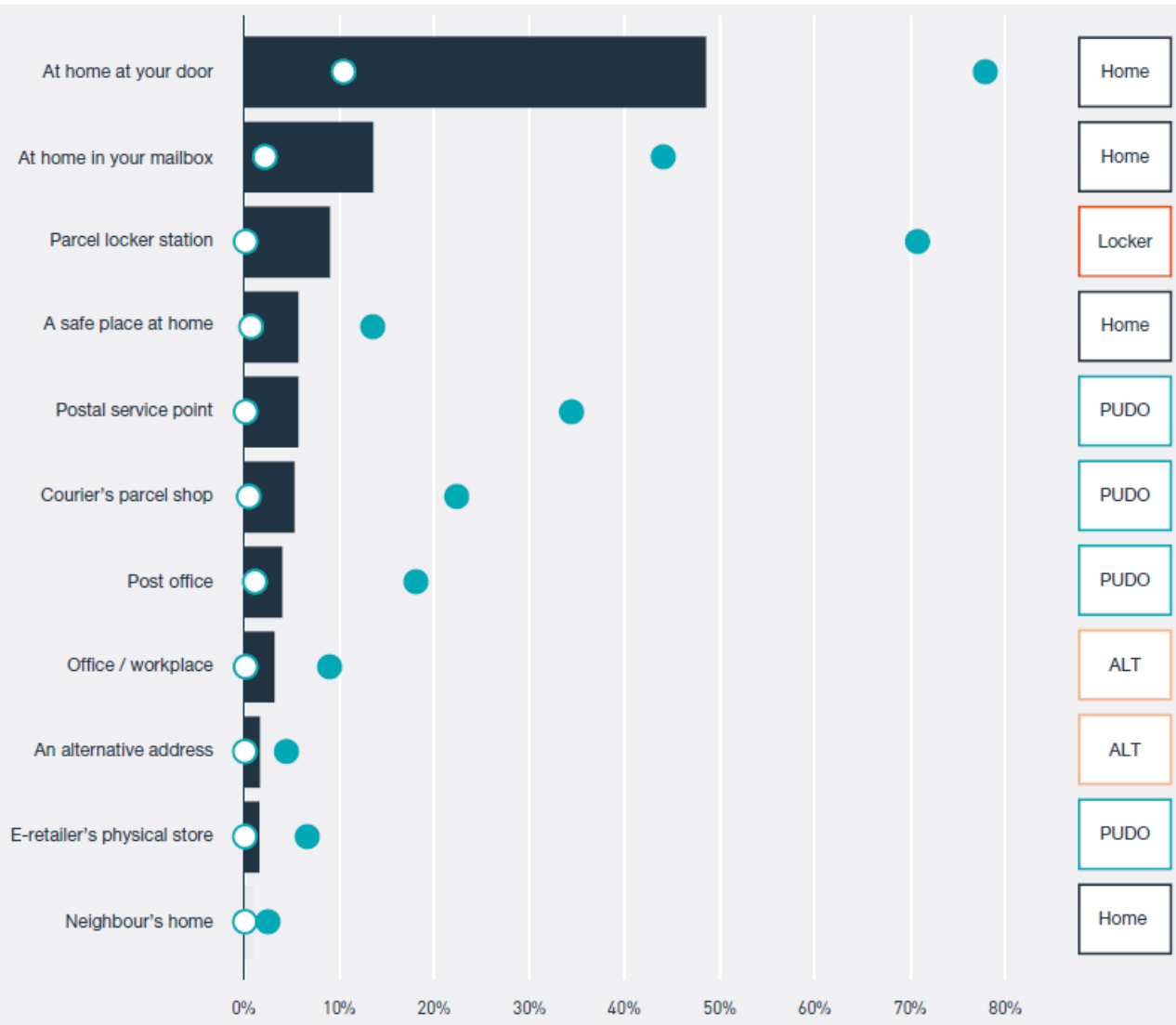
N: 23,667 (Trend)



People bought more for China, yet delivery got faster: an indicator of evolving Supply Chains



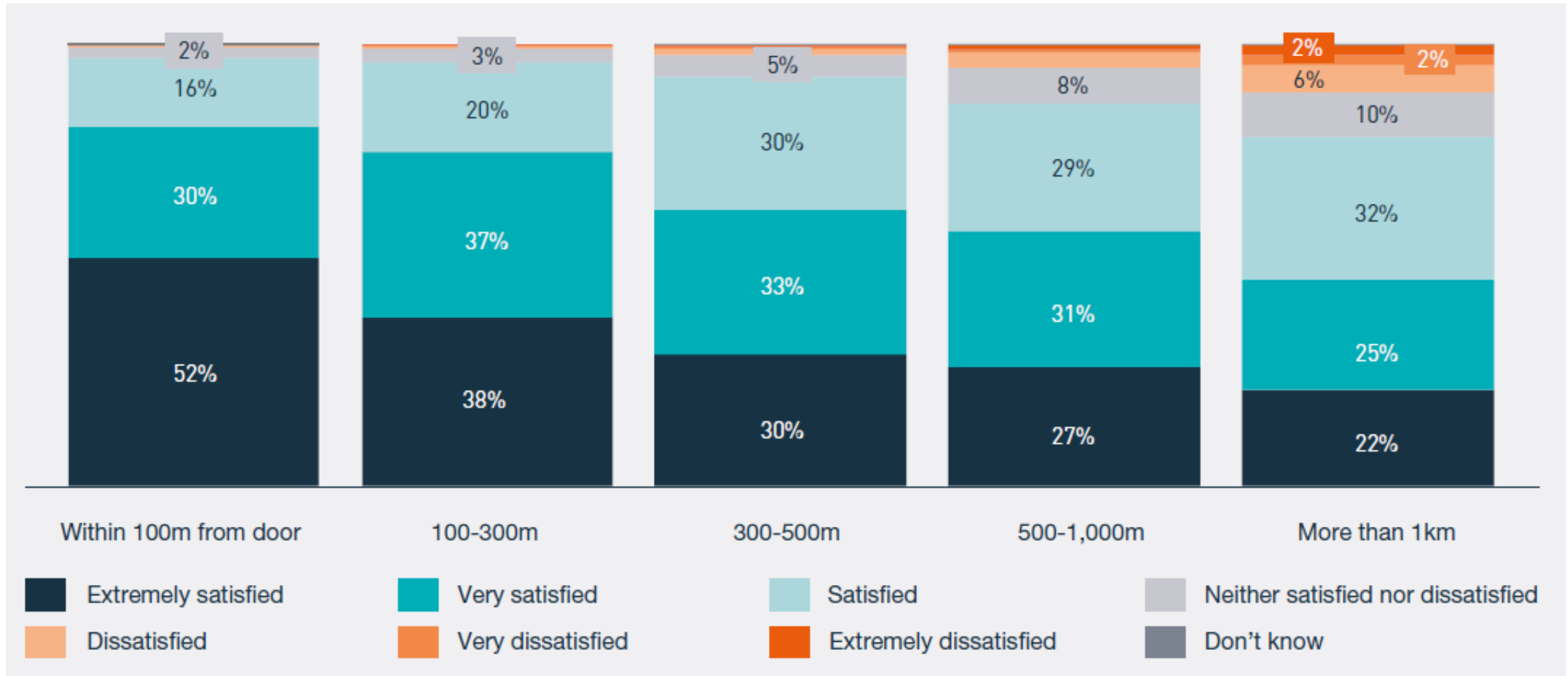
Home delivery is predominant, though parcel locker preference is rising



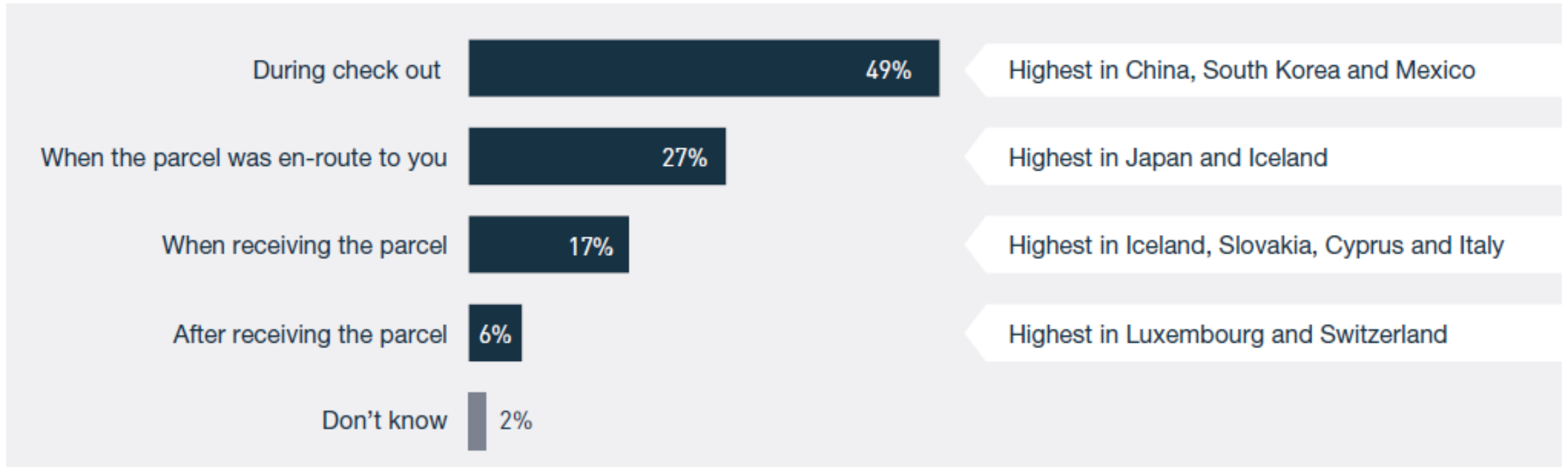
- In most countries (26 out of 37), deliveries to doorstep/mailbox accounted for at least 50% of most recent cross-border purchases
- Notable that parcel locker usage is rising, and is the main delivery location in several countries

DELIVERY LOCATION SATISFACTION: LOCKERS & PICK-UP DROP-OFF POINTS

Distance to Out-of-Home location strongly correlated with level of delivery location satisfaction

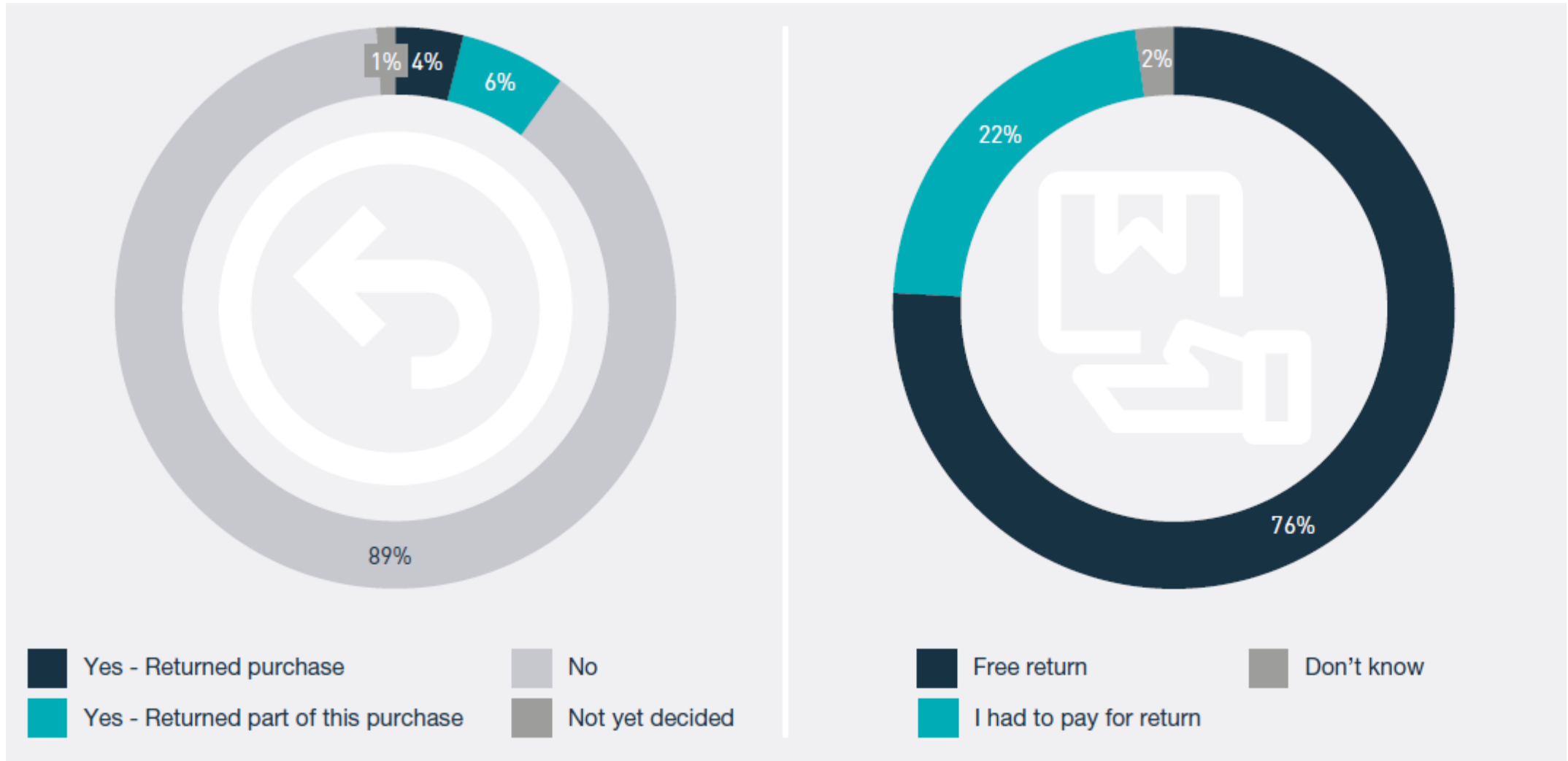


14% paid customs on their most recent cross-border online purchase

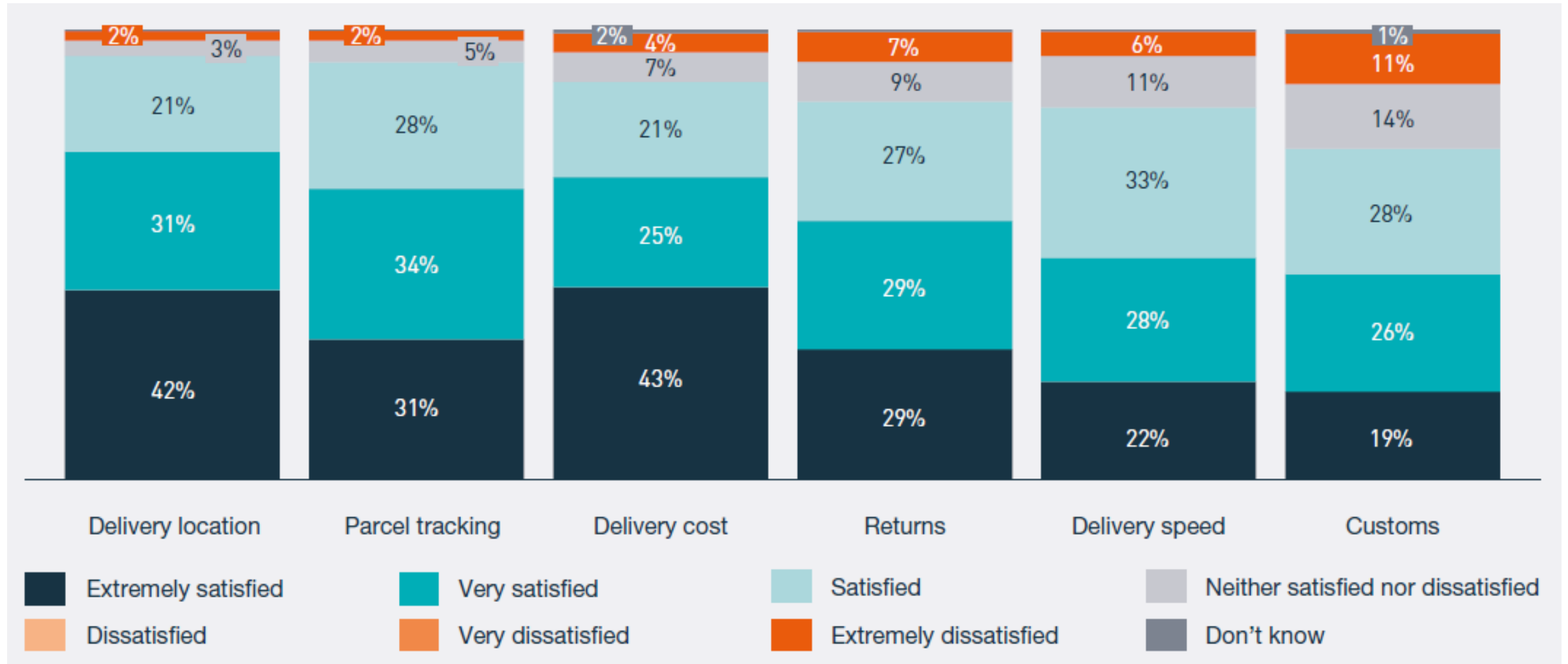


- Customs is still the biggest pain point for consumers.
 - The earlier that they pay customs, the higher their level of customs satisfaction

10% returned their cross-border purchase, yet some e-retailers are changing their Free Returns policies



Satisfaction is lowest with Customs

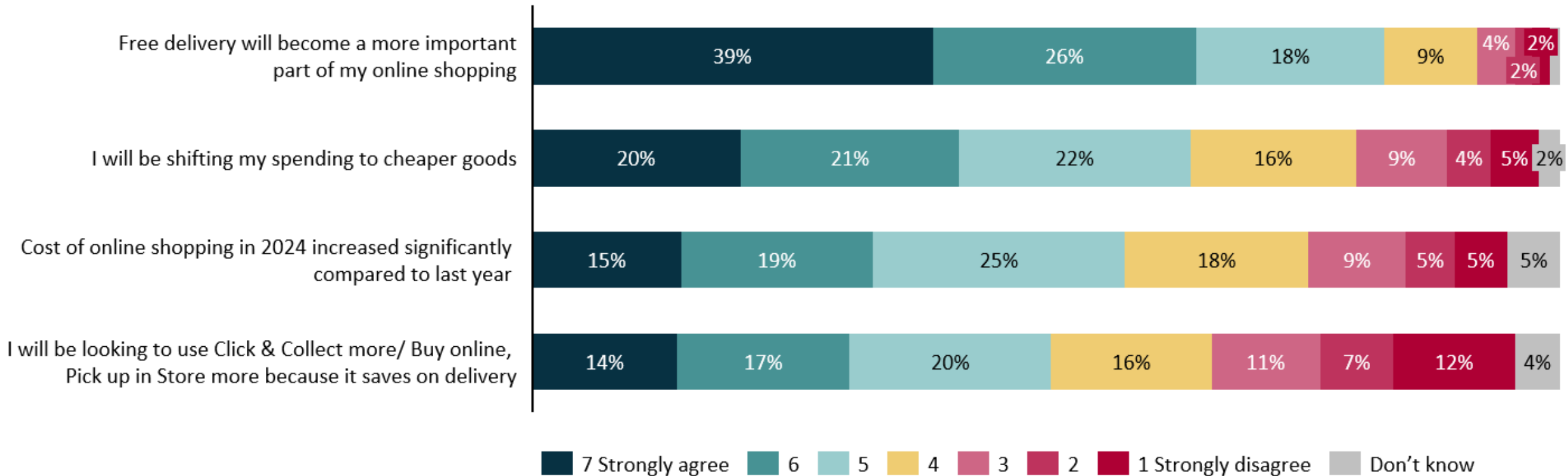


CONSUMER PREFERENCES

Consumers still insist on free delivery, thus undervaluing the true cost of cross-border delivery

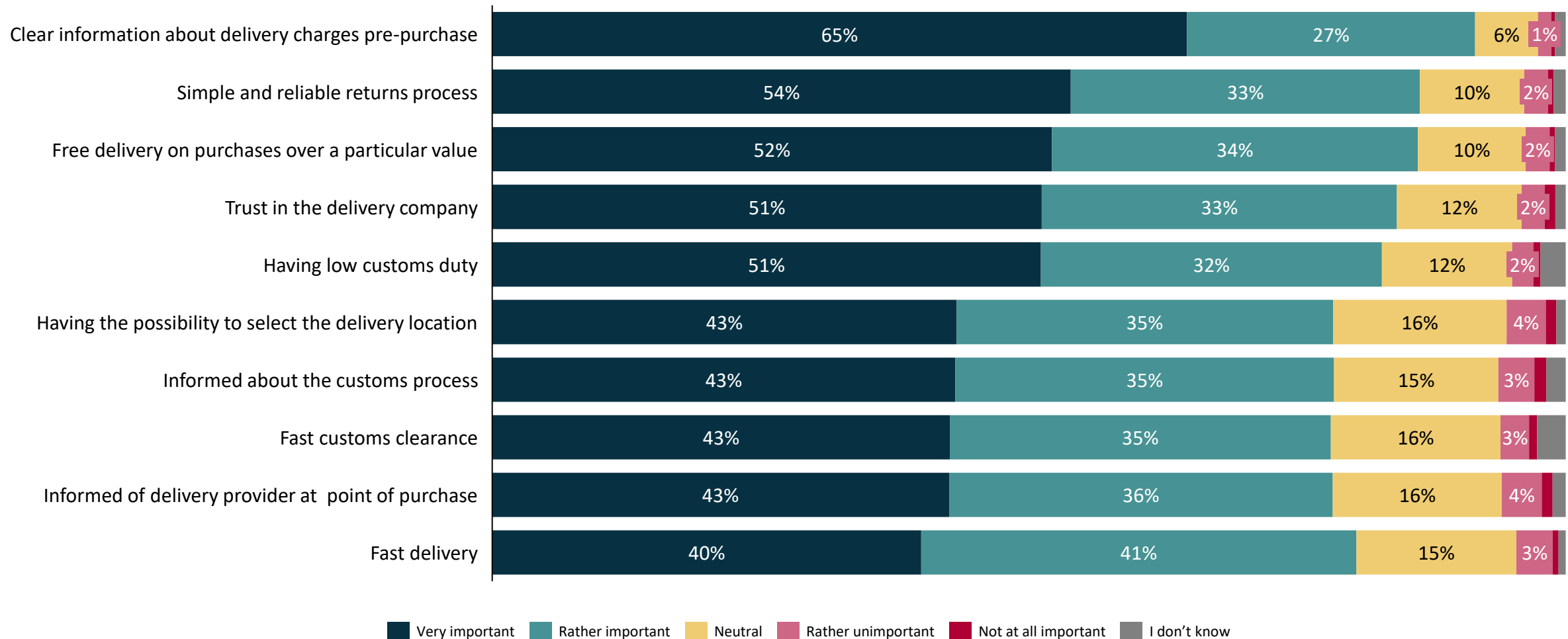
- **E-retail is increasing, but consumers are very price-sensitive**

➤ **Explains why Temu has been so successful**



IMPORTANCE OF DELIVERY ELEMENTS

Clear information about delivery charges pre-purchase is most important



Survey Conclusions

Challenge:

Consumers expect free delivery



Consumers expect fast delivery



Customs is the biggest pain point



Due to politics, the market is volatile



Postal opportunity:

Keep prices down & reach out to e-retailers

Data is the key:

- Tracking manages expectations
- Data speeds the customs process

Market volatility also affects delivery rivals

People trust the Post, even in challenging times

IPC IS NOW PREPARING FOR THE 2025 SURVEY

Reaching out to non-IPC posts to join the 2025 survey

More information at www.ipc.be/shopper

- **500 or 1,000 responses per country**
- **IPC is happy to work with interested posts and postal unions (currently in dialogue with PUASP and PostEurop)**
- **IPC provides lowest price possible – cost is to pay for market research company to find respondents per country**
- **Analysis and Reporting done by IPC. Overall Report + Country Report.**
- **In other posts, these reports are used by Marketing, Sales, Strategy and Operations.**
- **IPC needs to finalise country list by end of July 2025. Fieldwork is in September and report is provided in December**

**THANK YOU FOR YOUR TIME:
ANY QUESTIONS?**

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