



INTERNATIONAL MAILING IN THE AGE OF E- COMMERCE

Postalvision 2020



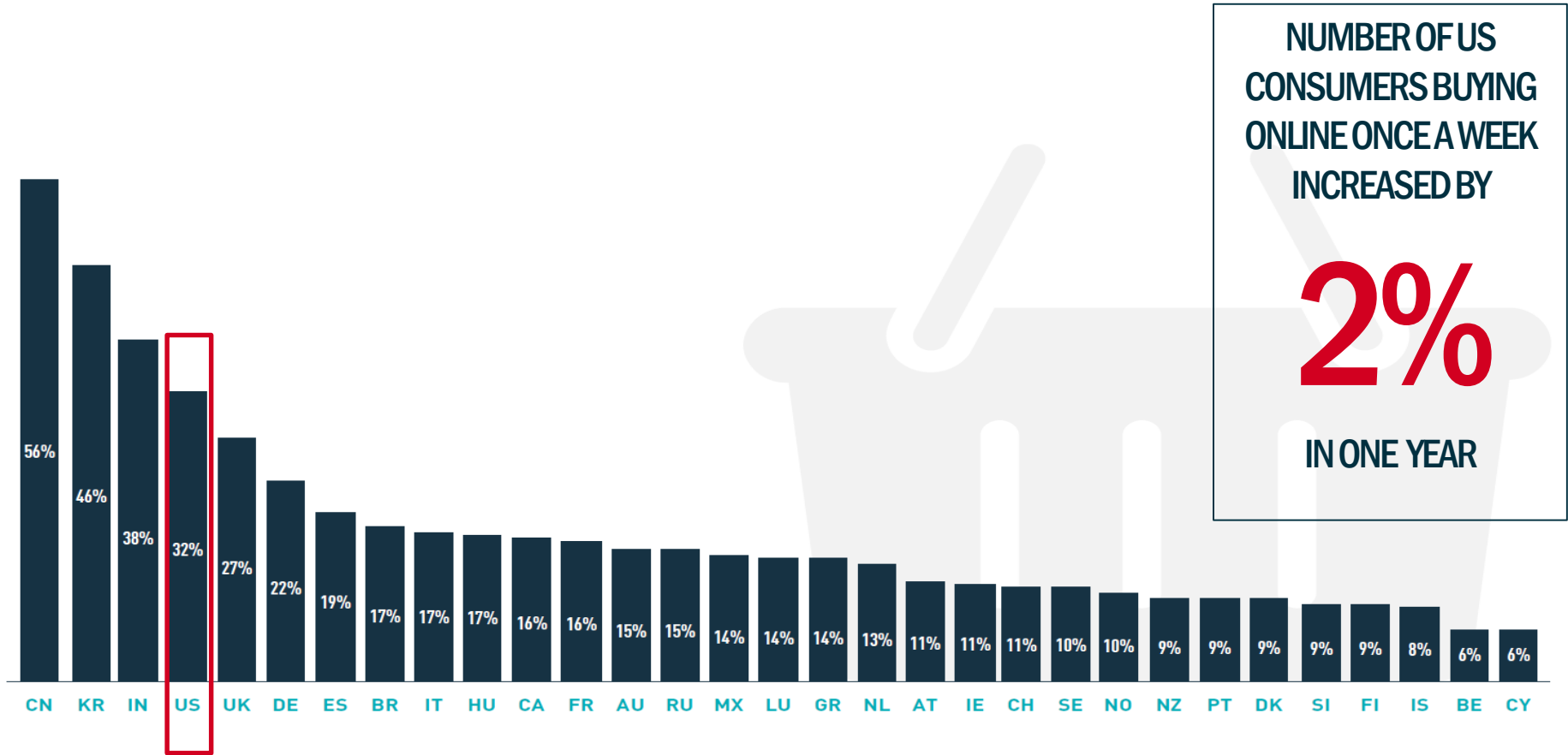
Presented by David SpottisWood

pages

04-04-2018

FREQUENCY OF ONLINE SHOPPING

US shoppers among the most active e-shoppers

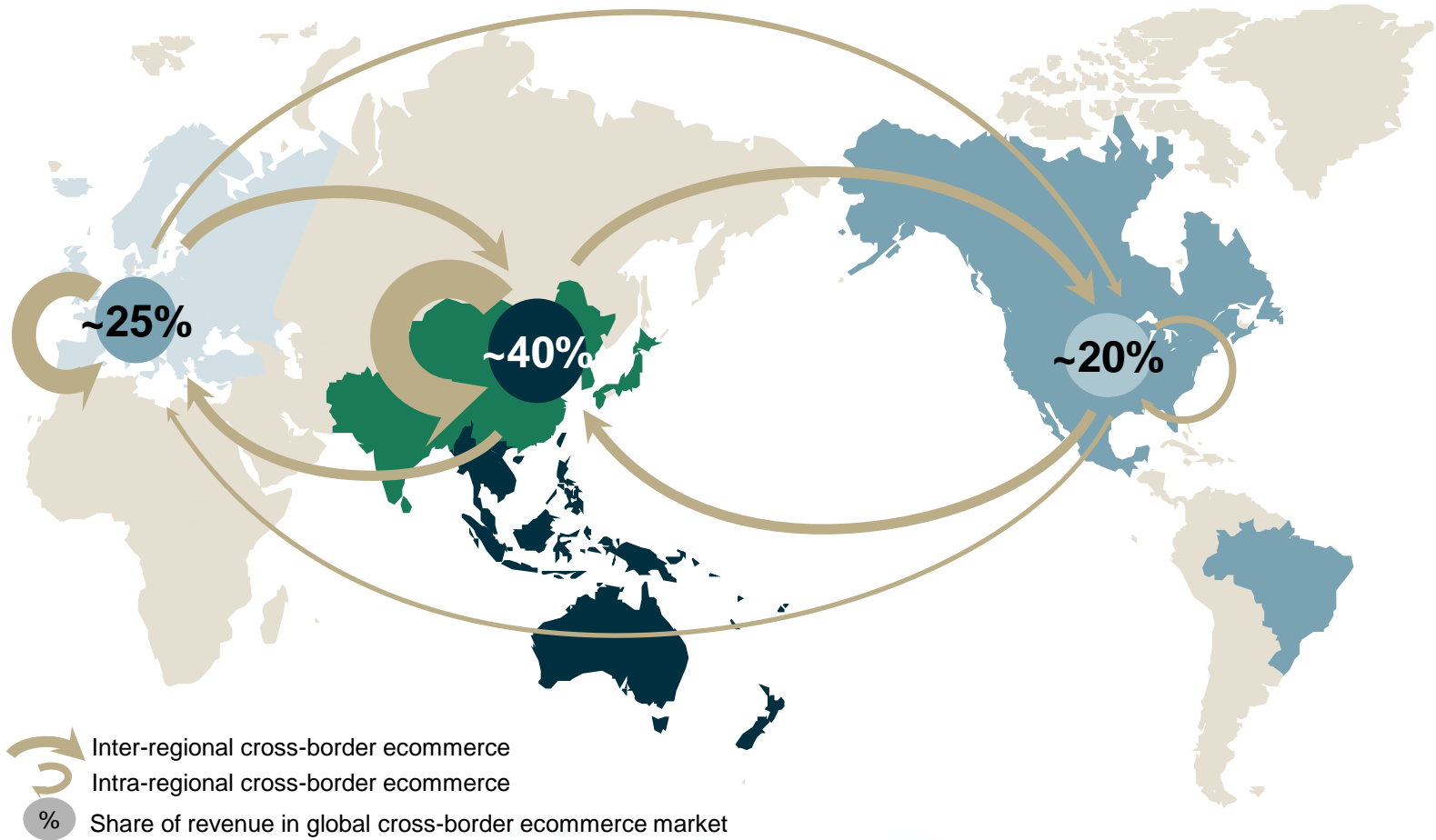


Question: Over the past 12 months, on average how often have you purchased physical goods online (excluding purchasing groceries)?
Sample: 28,892 (all respondents)

CROSS-BORDER IS GROWING

Biggest flows in 2025 to, from and in Asia

International **Post**
Corporation



THE BOSTON CONSULTING GROUP



IMPORTANCE OF DELIVERY

Clear information about delivery charges is a priority

International **Post**
Corporation

	2016 "Very important"	2017 "Very important"	Annual diff.
Clear information about delivery charges before purchase	67%	71%	+4%
Simple and reliable returns process	52%	57%	+4%
Free returns	55%	57%	+1%
Free delivery on purchases over a particular value	52%	53%	0%
Landed cost calculator at check-out	46%	51%	+6%
Full visibility on delivery process, clearly visible track & trace available	42%	46%	+4%
Possibility to select delivery location	42%	46%	+3%
Receiving delivery within an agreed time range	43%	43%	0%
Rapid response customer service	40%	42%	+2%
Electronic notification of delivery	39%	39%	0%
Knowing which company will deliver goods	33%	31%	-2%
Receiving delivery on an exact day, defined at purchase moment	31%	30%	-1%

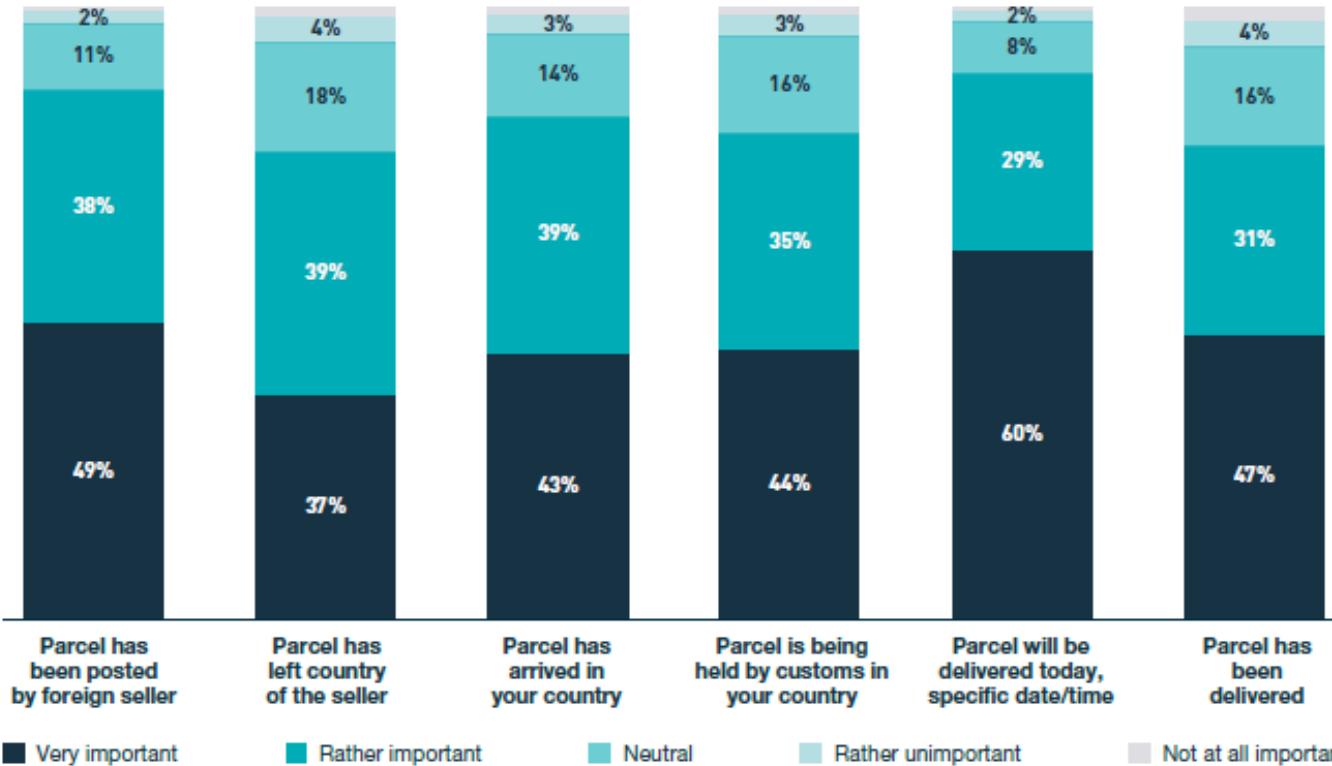
Question: How important are each of the following to you when shopping online?

Sample: 28,892 (all respondents)



TRACKING CROSS-BORDER

The 'out for delivery' event is the most valued



THE "OUT FOR DELIVERY" EVENT IS IMPORTANT FOR

89%

OF CONSUMERS

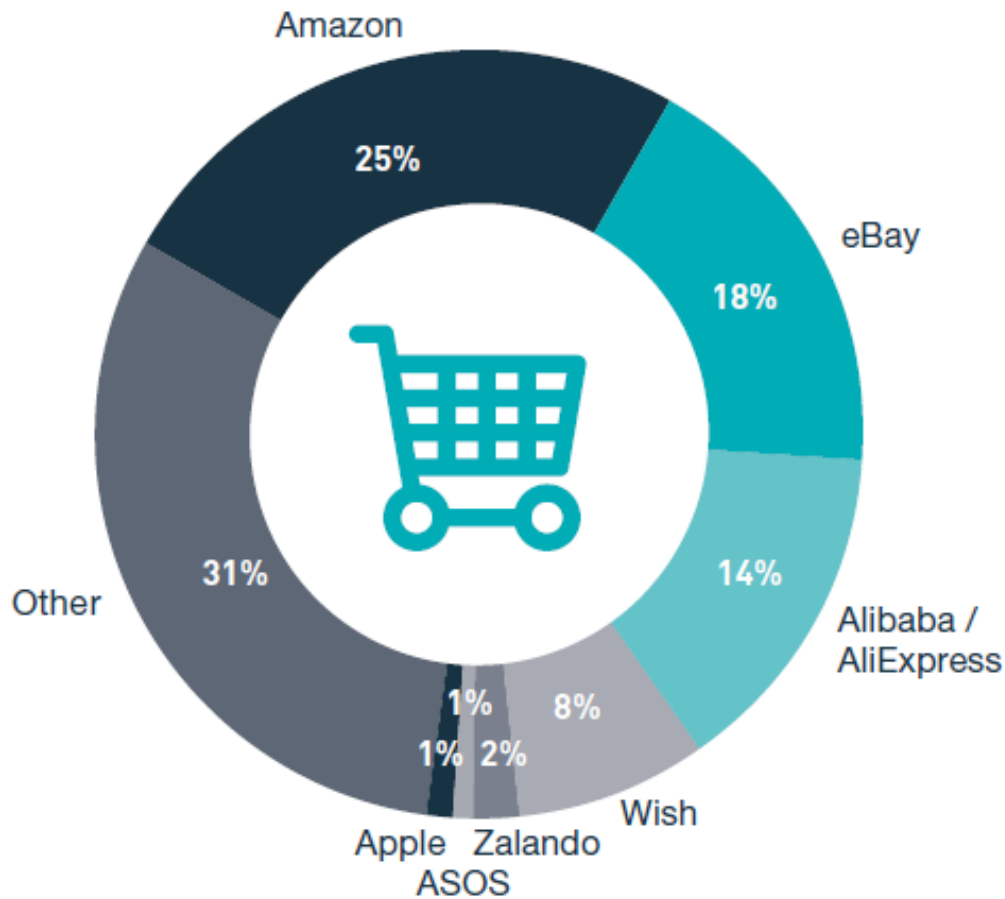
Question: For each of the below stages of an online cross-border purchase journey, how important is it for you to be informed that a parcel is at each stage?

Sample: 28,892 (all respondents) / 28,128 (those who had been offered tracking in past 12 months)



MAIN WEBSITES FOR CROSS-BORDER

Three e-retailers are dominant



AMAZON, EBAY, ALIBABA
AND WISH ACCOUNT FOR

2/3

OF CROSS-BORDER
E-COMMERCE FROM THE
SURVEY RESPONDENTS

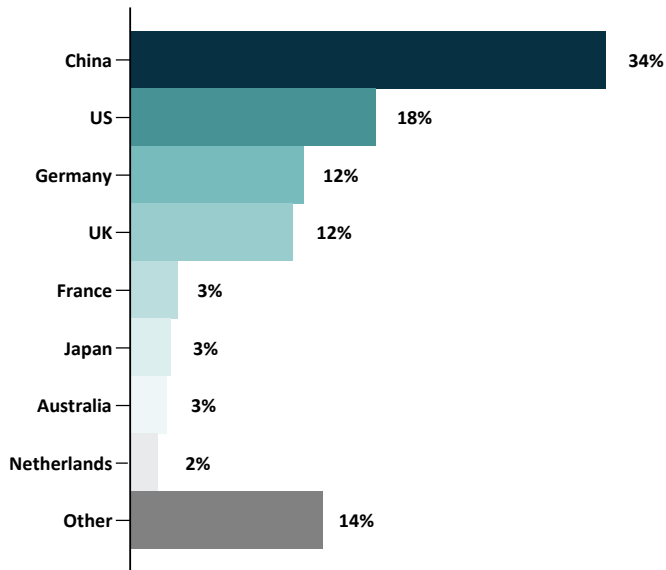


COUNTRY OF MOST RECENT PURCHASE

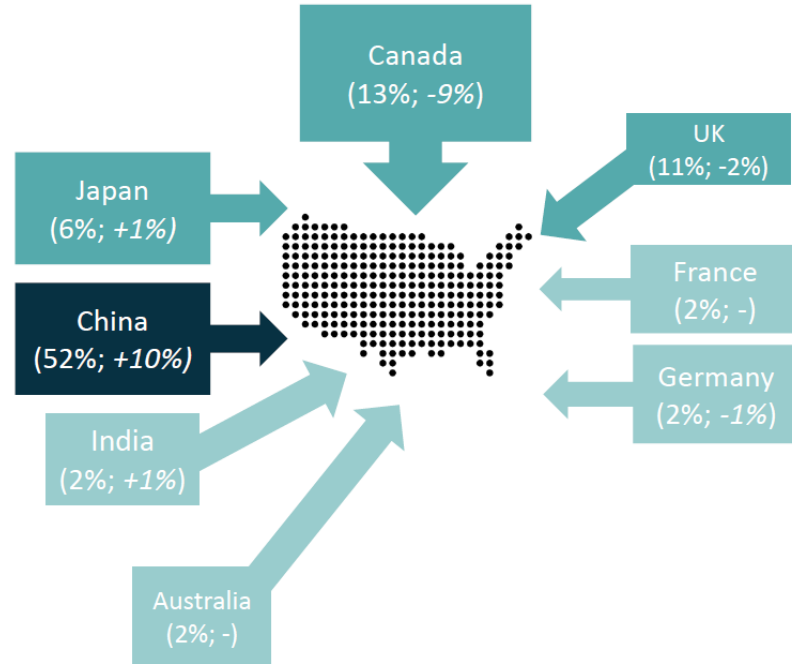
Purchases by US e-shoppers from China increased by 10%

International **Post**
Corporation

OVERALL

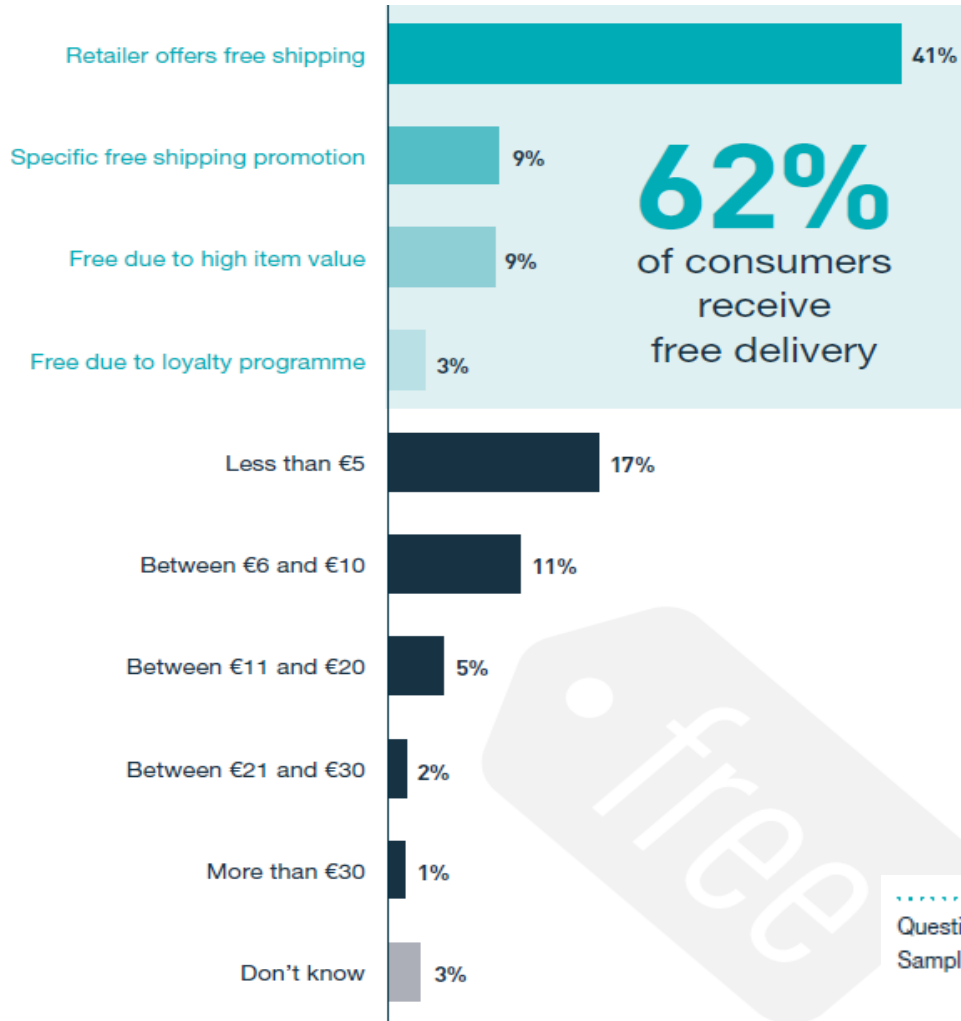


UNITED STATES



DELIVERY COST

62% consumers receive free delivery



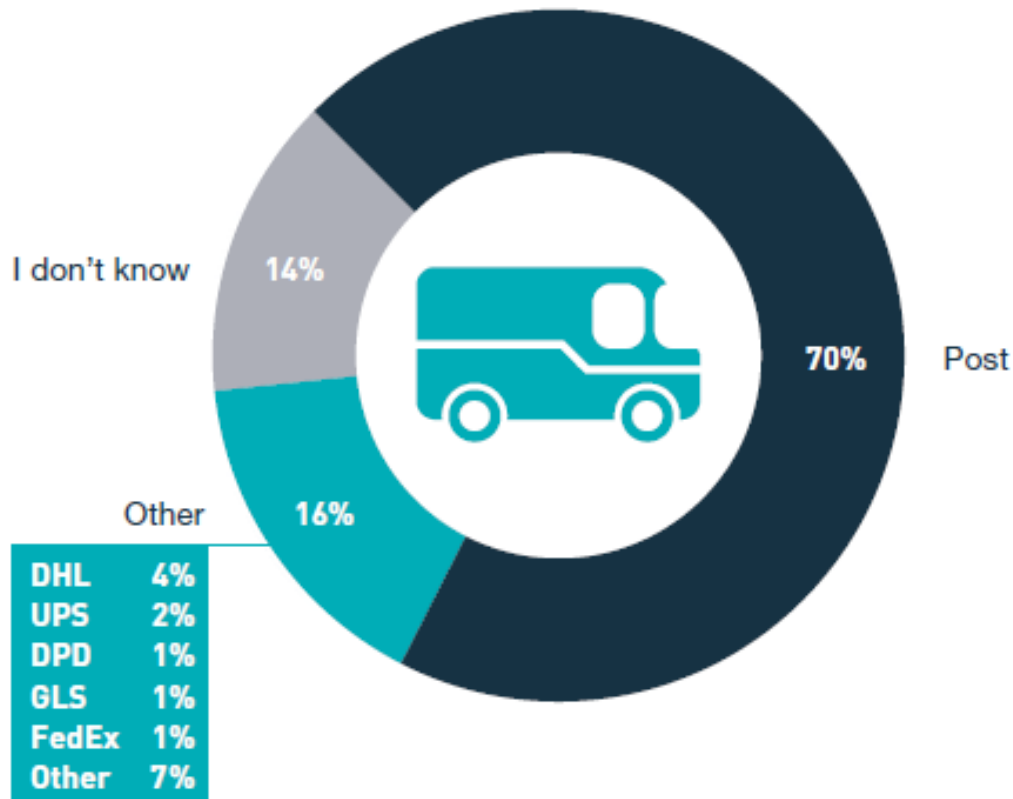
76%
OF CHINESE CONSUMERS
RECEIVED FREE SHIPPING
FOR CROSS-BORDER
PURCHASES

Question: Please specify the shipping cost for this particular purchase?
Sample: 28,892 (all respondents)



DELIVERY PROVIDER

3% decline in goods delivered by posts compared to 2016



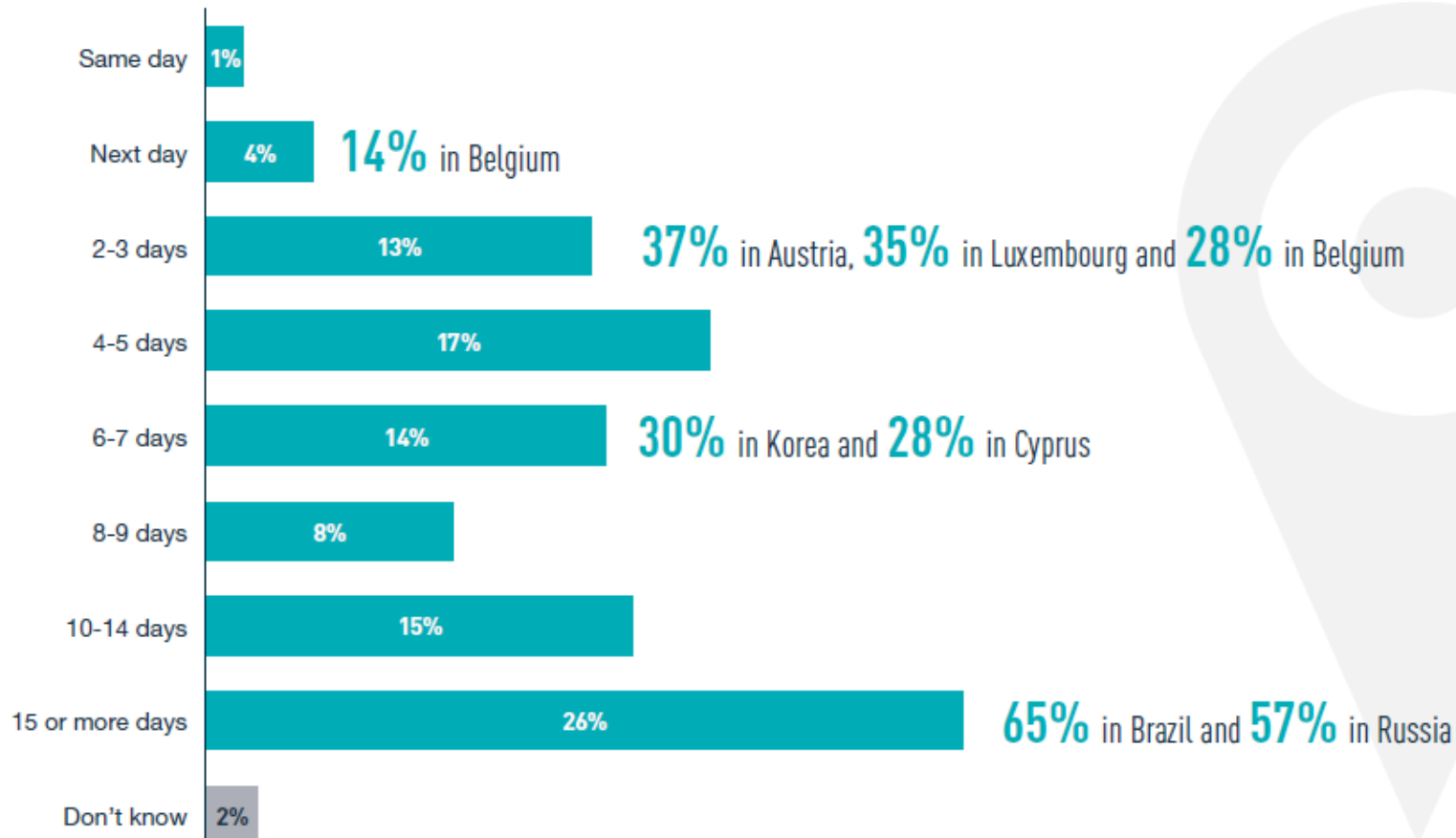
70%
OF MOST RECENT
CROSS-BORDER
DELIVERIES WERE BY
THE POST

Question: Was this particular parcel delivered by...?
Sample: 28,892 (all respondents)



DELIVERY TRANSIT TIMES

Longer delivery times in emerging markets



Question: How many days would you expect a parcel to take to reach you if it was bought from an online seller based in...?

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

Sample: 28,892 (all respondents)



CROSS-BORDER E-COMMERCE

E-shoppers want the same experience as domestic

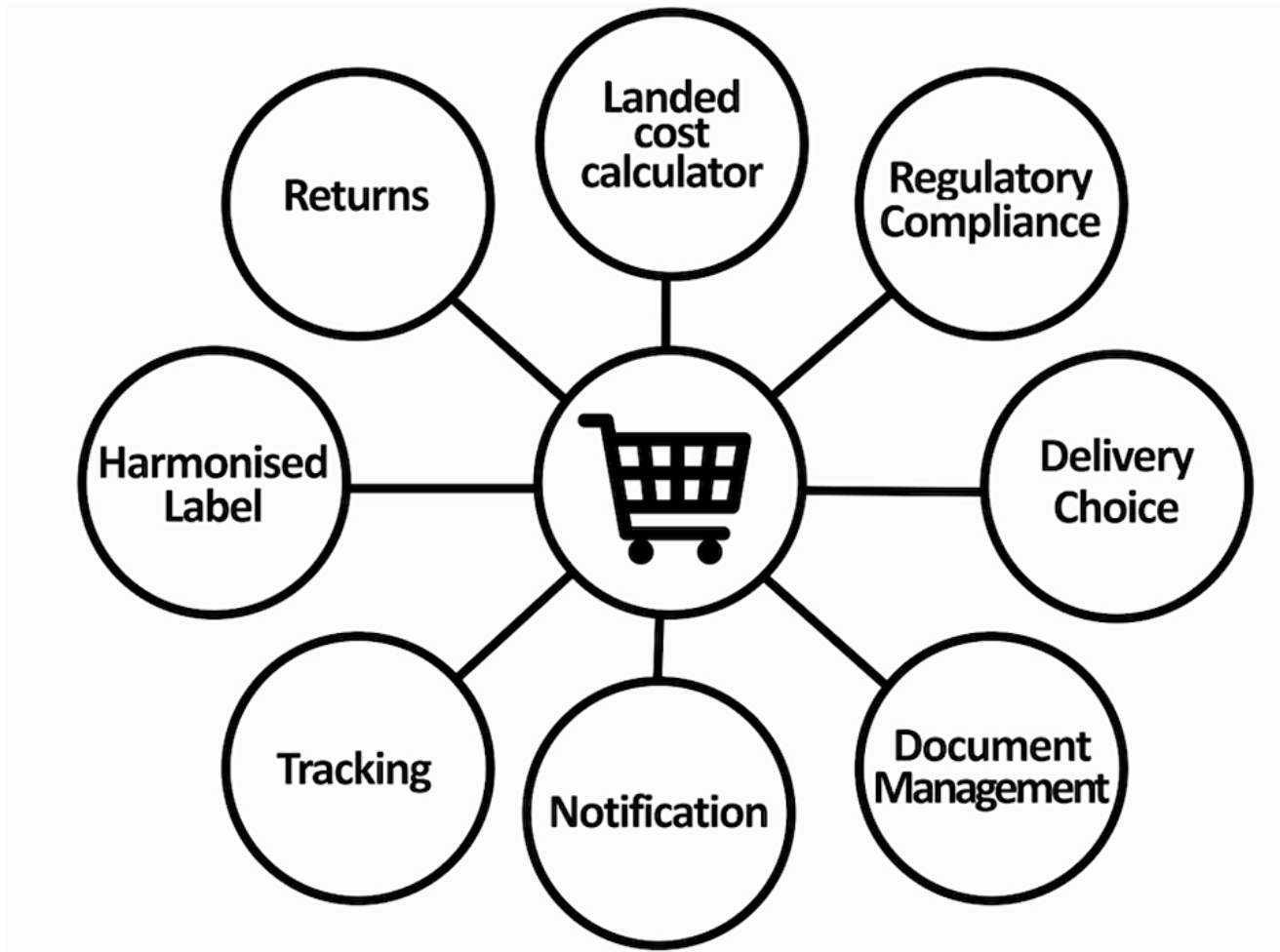
“Customers don’t like the cross-border experience, they don’t trust it; they don’t know where their parcels are.”

John Donahoe, CEO eBay



WHAT CAN POSTS DO

Embed postal delivery through in-cart solutions





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