

IPC DOMESTIC E-COMMERCE SHOPPER SURVEY PILOT

Key findings



Presented by

8 pages

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2020 IPC Domestic E-Commerce Shopper Survey Pilot

The 2020 IPC Domestic E-Commerce Shopper Survey Pilot was based on 6,184 online shoppers in eight countries – Australia, Finland, France, Germany, Greece, Portugal, the UK and the US. The research took place in June and July 2020 during the COVID-19 pandemic.

In addition to this Overall Report there are eight individual country reports providing further detail on consumer preferences and experiences of domestic e-commerce within their domestic markets. All reports will be shared with the IPC Markets Insights community and will be available to download from the IPC website.

- This is the first time IPC has researched domestic e-commerce shopper behaviour. The methodology and questionnaire were developed in close cooperation and agreement with the market research experts of the eight participating posts
- The Executive Summary highlights some of the key opportunities for postal operators and shows the potential for a larger scale domestic shopper survey research study across multiple markets. The key benefits to postal operators of such a study would be the significant cost savings to be derived from a common methodology, sharing of knowledge and best practice across the postal market research community and the benchmarking opportunity to compare markets at different stages of e-commerce maturity. In combination with the existing IPC Cross-Border E-Commerce Shopper Survey, this research provides significant insights into the preferences and experience of online shoppers

Hopefully the findings of this pilot will encourage posts to take actions to improve their market share of e-commerce delivery, and to encourage them to fund future research in domestic markets through IPC.

FOCUS ON COVID-19 PANDEMIC

Impact on e-commerce

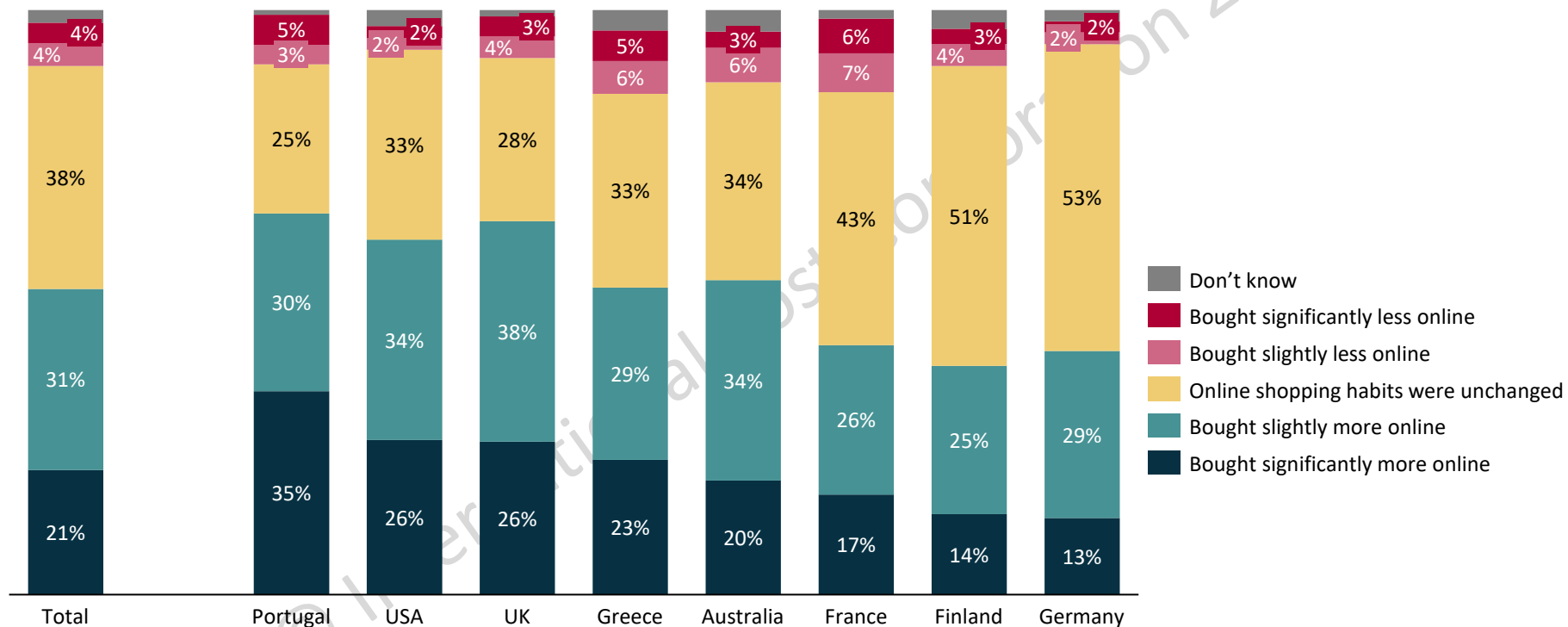
Future impacts

ONLINE SHOPPING HABITS AFFECTED BY COVID-19 PANDEMIC

52% bought significantly or slightly more online

COVID-19 caused a big increase in e-commerce, with 21% buying significantly more online, and 52% buying more. Although people may spend less on retail due to financial concerns, the fact that shops were closed caused a huge shift to online shopping.

At country level, the growth has been highest in Portugal (35% buying significantly more online), which is notable when considering that Portuguese consumers have been relatively slow to adopt e-commerce. The US and UK – which both already have a high level of e-commerce – both saw a 26% increase in consumers buying significantly more online during the lockdown.



Question: In recent months, how have your shopping habits been affected by the COVID-19 epidemic in your country?

Base: 6,184

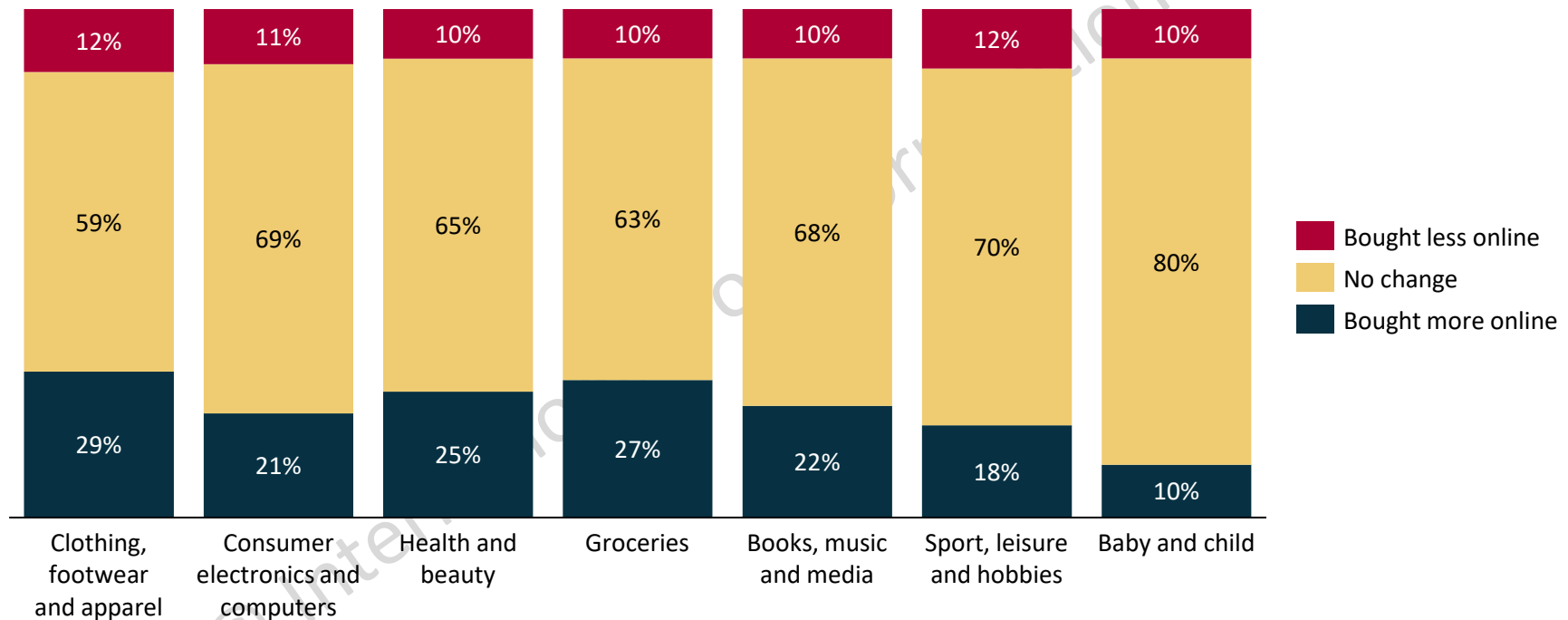


COVID-19 PANDEMIC IMPACT PER PRODUCT CATEGORY

Increase in online shopping for almost all categories.

When asked for how their shopping habits had changed per product category, it can be seen that the COVID lockdown caused an increase in purchasing almost all product types.

29% bought more clothing online, while 12% bought less clothing online. Online grocery shopping also experienced a major boost, with 27% buying more online, and 10% buying less. Furthermore, 25% had bought more health and beauty products online due to COVID-19. The only product type that did not increase its online shopping was Baby and child.



Question: For each of the following product types, how have your online shopping habits been affected during the COVID-19 lockdown?

Base: 6,184



COVID-19 PANDEMIC IMPACT PER PRODUCT CATEGORY

Percentage buying more per country

The table below shows the percentage of consumers who said that they “Buy more online”, per product category and per country.

For example, 28% of Australians bought more Clothing, footwear and apparel online during the lockdown, while 23% in Finland bought more Clothing, footwear and apparel online. Notable country findings from this table are...

- Online grocery shopping increased the most in the UK (38% buying more online)
- Purchase of health and beauty items increased most in Greece (35%)
- Over a third of consumers in Greece and Portugal bought more Clothing, footwear and apparel online

% Buying more online...	Clothing, footwear and apparel	Consumer electronics and computers	Health and beauty	Groceries	Books, music and media	Sport, leisure and hobbies	Baby and child
Australia	28%	22%	24%	24%	23%	20%	15%
Finland	23%	17%	16%	18%	15%	16%	5%
France	24%	15%	18%	25%	20%	13%	8%
Germany	23%	14%	17%	13%	20%	18%	5%
Greece	37%	29%	35%	33%	24%	18%	13%
Portugal	34%	38%	31%	34%	26%	27%	13%
UK	33%	20%	30%	38%	25%	18%	10%
US	32%	22%	30%	33%	23%	19%	16%

Question: For each of the following product types, how have your online shopping habits been affected during the COVID-19 lockdown?

Base: 6,184

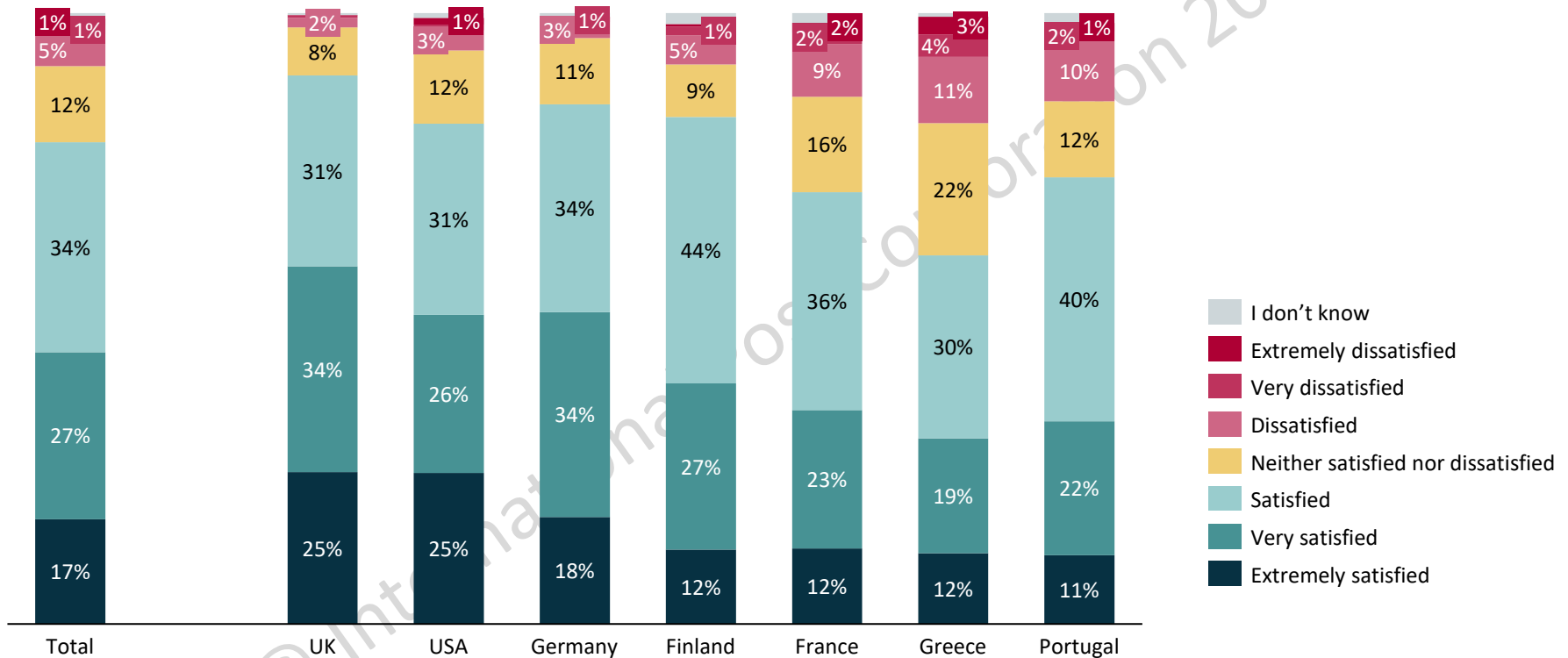


COVID-19 PANDEMIC DELIVERY SPEED SATISFACTION

45% were extremely / very satisfied, but 8% were dissatisfied

Respondents were asked for their level of satisfaction with the delivery speed for all purchases made during the COVID-19 lockdown.

The table below shows results at overall level, and per country. At overall level, 45% were extremely / very satisfied with this. At country level, satisfaction was highest in the UK and US, followed by Germany. The number of dissatisfied consumers was highest in Greece, Portugal and France.



Question: How satisfied are you with the delivery speed for all your purchases made during the COVID-19 lockdown?

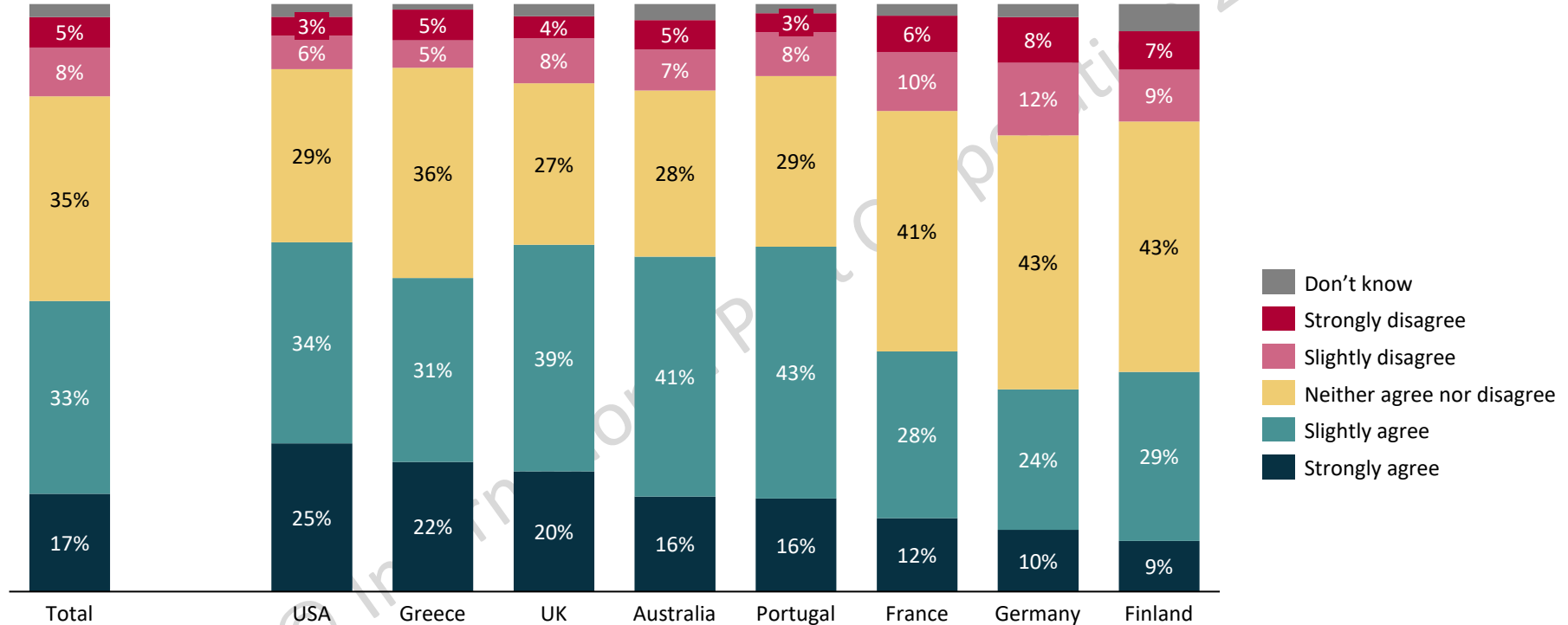
Base: 6,184



49% agree that COVID-19 means that they will shop more online in future

Looking to the future, respondents were asked for their level of agreement with the statement “COVID-19 means that I will increasingly shop online rather than in-store in future”. 17% strongly agreed with this statement, 49% slightly / strongly agreed with it, and 13% disagreed with the statement.

At country level, the level of ‘strongly agree’ was highest in the US (25%), Greece (22%) and the UK (20%). The level of ‘slightly / strongly disagree’ was highest in Germany (20%), followed by France (16%) and Finland (15%).



Question: To what extent do you agree with the following statement: COVID-19 means that I will increasingly shop online rather than in-store in future?

Base: 6,184