



# GLOBAL ONLINE SHOPPER SURVEY 2023

HOW THE WORLD'S E-COMMERCE CUSTOMERS WANT TO SHOP





# WELCOME TO THE DHL GLOBAL ONLINE SHOPPER SURVEY 2023

The first ever DHL eCommerce Global Online Shopper Survey is loaded with unmissable information about how shoppers across the world buy online. For an e-commerce business looking to grow in new markets, these are the insights that put success in your grasp.

- Shoppers surveyed in 23 countries across the globe including Argentina, Australia, Brazil, Canada, China, India, Malaysia, Morocco, Nigeria, South Africa, Thailand, UAE and USA. Plus, there are insights from 10 European countries available in our European Online Shopper Survey 2023 which you can read [here](#).
- Covers all six major global markets: Europe, North America, Latin America (LATAM), the Middle East and North Africa (MENA), Sub-Saharan Africa (SSA), and Asia Pacific and China (APAC).
- Over 11,500 active online shoppers surveyed.
- Broad spectrum of survey topics covered including: where and why shoppers buy cross-border, what they buy and how often, attitudes to delivery and returns, why sustainability matters – and much more.
- Includes expert tips from DHL eCommerce specialists to help you break into new markets.

The Global Online Shopper Survey 2023 is the first of its kind, following the success of DHL eCommerce's European Online Shopper Survey launched in 2022 and updated this year. This is the must-see report from the world's No.1 e-commerce logistics supplier, and for both start-up and established businesses, it's how your customers think about shopping online...





# WHO TOOK PART IN THE GLOBAL SURVEY?

The countries selected for the Global Online Shopper Survey 2023 are all important players in the growth of e-commerce worldwide. These are some of the most mature or rapidly advancing online shopping economies e-tailers should have in their sights...

Region	Country	“Our survey said...”
APAC	AU 	52% never use social media to shop
	CN 	No.1 country online shoppers buy from
	IN 	62% would buy more cross-border if prices were presented in Rupees
	MY 	57% use TikTok to buy online
	TH 	Most regular online browsers in the world
Europe	AT 	Most likely in Europe to redirect deliveries
	CZ 	Least likely in Europe to redirect deliveries!
	FR 	Happiest in Europe to print their own returns labels
	DE 	Growing preference for buy now, pay later
	IT 	More than 1 in 4 shoppers say sustainable deliveries are very important
	NL 	Most likely to buy sports, leisure and hobby items online
	PL 	22% still prefer to pay cash on delivery
	ES 	Highly likely to choose online retailer based on delivery options
	SE 	Least likely to be satisfied with delivery of their purchases
LATAM	UK 	Least likely in Europe to choose parcel locker delivery
	AR 	Over-index for spending between \$50 – £250 per month
MENA	BR 	Most likely to say they are heavily influenced by delivery options
	MA 	38% of shoppers buy products from France
North America	UE 	12% shop online every day
	CA 	83% of shoppers want goods delivered to their home
SSA	US 	89% shop at Amazon
	NG 	Happiest globally to pay for delivery
	ZA 	52% want to know who will deliver their goods before purchasing







# EXECUTIVE SUMMARY

## The online shopping world is changing...

Domestic and cross-border online shopping is accelerating across the world, fast! As it grows, new trends are emerging, and expectations are changing. From the evolution of social media shopping to a demand for more rapid delivery times, your customers are pushing for better...



Look out for our expert tips on how you can take these insights to help benefit your e-commerce business.

## YOUR TOP 15 HEADLINES FOR 2023

1. Flexible delivery options are vital to securing more sales. 95% of the online shoppers surveyed said they have abandoned a purchase because the delivery option – such as home delivery or leaving goods at a parcel locker, parcel shop or neighbor – wasn't available (pg. 31).
2. A whopping 98% of global shoppers in the survey said they are influenced to some or a great extent by customer reviews...with Brazilians the most likely to get their advice from peers (pg. 48).
3. Good news for clothing and footwear retailers! Over 60% of global shoppers have made cross-border purchases in this category (with South Africans and Indians the biggest shoppers). If you're a sports and leisure seller, you might want to consider the Netherlands where nearly one-third of shoppers have bought these products from another country (pg. 22-23).
4. On the whole, the world's retailers are offering their shoppers a good range of payment options with 85% satisfied with the options. 67% choose to use their credit/debit cards or a digital wallet (e.g. PayPal) but cash on delivery is still a preference in some parts of the world (pg. 51).
5. Who delivers your goods matters to customers. 70% of shoppers said knowing this information before placing an order was important to them. 43% said they would abandon their purchase if they didn't trust the delivery provider. And in regions such as the Middle East and North Africa, this rises to 61% (pg. 32).
6. Shoppers worldwide hate getting hit with higher than expected delivery charges at the checkout – the No. 1 reason for cart abandonment. Being upfront about delivery charges – or rolling them into the pricing of the product – can reduce cart ditching by over 50% (pg. 27).
7. More than 4 in 10 of the world's online shoppers only buy from sites that offer them free returns – and in countries such as Morocco and India, that rises to 6 in 10! (pg. 36).
8. Giving customers the ability to redirect their deliveries to another location at the last minute matters to many of the world's shoppers (pg. 30) with over 75% saying they want to be able to have their goods left in a safe place when they're not home (pg. 30).
9. China and Thailand lead the world for social media shopping with more than half of respondents regularly buying on platforms versus a global average of 28%. And with 7 in 10 shoppers worldwide using social media for shopping inspiration, this points to a valuable sales channel for retailers (pg. 47).
10. Subscription services are continuing to grow at pace around the world with 36% of shoppers now having at least one subscription to an online retailer. Beauty products are the No.1 subscription with food and clothing subscriptions increasingly popular (pg. 49).
11. More than 70% of respondents said that sustainability is important to them when they shop online and almost a half would be prepared to wait longer for their goods if it would help the environment. Given a choice, 28% would be prepared to pay more – but most would prefer the vendor to on-board the costs (pg. 40).
12. High-value goods and those sent as gifts really should be offered with free end-to-end tracking – over 80% of respondents said this was important to them (pg. 34).
13. Fear of fraud and long delivery times are the prime reasons that prevent shoppers from buying more goods from other countries. Expensive customs charges are also a big turn off. However, shoppers in some countries, such as India and Malaysia, simply say they can get everything they need at home (pg. 20).
14. With a return to normality and fewer people working from home, shoppers are moving away from home deliveries and demanding greater flexibility and a wider range of options from online retailers. Although having purchases delivered to their home is still the first choice for 76% of global shoppers, 15% now want goods left at an access point (such as a parcel locker or shop) and 9% prefer their goods left with a neighbor (pg. 29).
15. One simple improvement would encourage 50% of global shoppers to buy more from other countries...seeing goods priced in their own currency. For shoppers in Australia and India, this could boost sales by over 60%! (pg. 21).



# WHAT YOUR CUSTOMERS TOLD US

These are some of the things our global shoppers in 23 countries told us, and what makes each nation stand out...



"I'm a bookworm, so I still buy books online!"



"I'll be shopping cross-border more in the next year"

Every market is unique and different. It's vital to understand national preferences if you want to build a successful e-commerce business that ships goods across the globe.

**Read on to get the full picture...**



"I want to track my cross-border buys"



"Good packaging is important to me"



"I'm concerned about online fraud"



"I want my purchases delivered quickly"



"Douyin is great for buying goods online"



"I prefer to have my goods delivered to a locker"



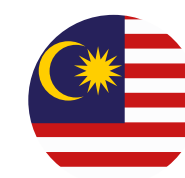
"I want payment options I can trust"



"I'd like to see simpler browsing options"



"I regularly use an online subscription service"



"I always shop on my smartphone"



# FACT FILE BY REGION

**Every part of the world has a distinct attitude to shopping online and cross-border shopping.**

Often, these are driven by economic, geographic and cultural factors such as the use of WeChat in China and Amazon in the USA. Here are some of the main highlights by region...



# SUB-SAHARAN AFRICA

## SSA SHOPPERS WANT FASTER SHIPPING

When they do shop abroad, Sub-Saharan shoppers look for better quality goods than they can get at home – and they want their buys to reach them faster. They are least likely to expect free returns.

They are more likely to use their smartphone to buy which is why website security is high on their wishlist, and they rely heavily on product reviews before making a purchase.



**94%** CHECK ONLINE REVIEWS BEFORE BUYING

**90%** OF SHOPPERS IN SSA ARE QUITE OR VERY SATISFIED WITH THEIR CROSS-BORDER DELIVERIES

**78%** OF SOUTH AFRICANS WHO BUY CROSS-BORDER BUY CLOTHING AND FOOTWEAR

**77%** USE SMARTPHONES TO SHOP

**67%** OF SSA SHOPPERS WANT FASTER DELIVERY

**56%** SHOP ABROAD FOR BETTER QUALITY PRODUCTS

**27%** OF SSA SHOPPERS SAY FREE RETURNS NOT AN ISSUE IF THEY WANT THE GOODS



# MIDDLE EAST AND NORTH AFRICA

## MENA SHOPPERS WANT IT ALL. TOMORROW!

Middle Eastern and North African shoppers are the most likely to buy cross-border. But who delivers their goods matters – and they will abandon a purchase if not offered the delivery option they want.

69% want free, next-day delivery, they are the most likely to demand free returns and 1 in 3 still prefer to pay cash on delivery. Food and drink are key purchases and almost one-fifth of UAE residents shop online at least once day!



**81%** OF MENA SHOPPERS INSIST ON KNOWING THE DELIVERY COMPANY BEFORE MAKING A PURCHASE

**67%** OF SHOPPERS IN MENA MAKE CROSS-BORDER PURCHASES

**62%** FREQUENTLY ABANDON THEIR PURCHASE IF NOT OFFERED THEIR PREFERRED DELIVERY OPTION

**58%** OF MENA SHOPPERS ONLY BUY FROM SITES OFFERING FREE RETURNS

**48%** CITE 'BETTER QUALITY' AS A REASON TO BUY ABROAD

**46%** SAY IT'S VERY IMPORTANT TO HAVE PACKAGES DELIVERED TOMORROW

**43%** OF MENA SHOPPERS HAVE A SUBSCRIPTION SERVICE



# ASIA PACIFIC AND CHINA

## TECHNOLOGY IS DRIVING THE GROWTH OF ASIAN E-COMMERCE

With nearly 80% of shoppers using only their smartphone to buy online, the rise of social media shopping is being led by APAC customers.

This may be why factors such as website design, site security, customer service and secure payment options are key to where they buy from. They're also the most switched on when it comes to subscription services – especially for beauty products.



**78%** OF APAC CUSTOMERS USE SMARTPHONES TO SHOP

**70%** OF CHINESE SHOPPERS PURCHASE VIA DOUYIN

**66%** OF THAI SHOPPERS DON'T BUY ABROAD DUE TO LONG DELIVERY TIMES

**47%** USE WECHAT IN CHINA TO BUY GOODS

**46%** USE A SUBSCRIPTION SERVICE – ESPECIALLY FOR BEAUTY PRODUCTS

**42%** REGULARLY USE SOCIAL MEDIA FOR INSPIRATION AND MAKING PURCHASES

**37%** IN ASIA PACIFIC ONLY BUY FROM SELLERS WHO PROVIDE FREE DELIVERY



# EUROPE

## EUROPEANS HAVE DIVERSE EXPECTATIONS BUT LOVE GOOD VALUE

Europeans want value for money when they shop – especially cross-border which is why they trust Amazon as their primary marketplace and 57% expect next-day delivery.

Every European nation has different ideas when it comes to delivery. For instance, 72% of Spaniards want delivery charges rolled into pricing and Poles (64%) want them separated out. The key is to flex to meet individual preferences.

[Read the in-depth 2023 European Online Shopper Survey](#)



**64%** SAY SUSTAINABLE DELIVERIES ARE IMPORTANT

**60%** USE AMAZON AS THEIR PRIMARY MARKETPLACE

**57%** SAY NEXT-DAY DELIVERY IS IMPORTANT

**50%** QUOTE LOWER PRICES AS A KEY CONSIDERATION TO SHOP CROSS-BORDER

**49%** OF POLISH SHOPPERS WANT TO USE PARCEL LOCKERS

**45%** OF EUROPEAN SHOPPERS ARE WORRIED ABOUT FRAUD

**34%** OF AUSTRIAN SHOPPERS WANT TO REDIRECT THEIR PARCELS TO A SAFE PLACE



# NORTH AMERICA

## NORTH AMERICANS PREFER DOMESTIC MARKETPLACES TO CROSS-BORDER SHOPPING

45% of North Americans purchase cross-border. Although, lower than the global average, this points to a growing appetite for international products.

And with 9 out of 10 Americans using Amazon, this is a vital way for e-commerce businesses to reach the US market. North Americans also have high expectations of cross-border delivery services – an important point to remember when selling to Canada and the States.



**89%** OF NORTH AMERICAN SHOPPERS USE AMAZON

**76%** SAY THEY ARE SATISFIED WITH CROSS-BORDER DELIVERIES

**58%** OF NORTH AMERICANS SAY NEXT-DAY DELIVERY IS IMPORTANT

**45%** BUY OUTSIDE OF THE REGION

**39%** USE SOCIAL MEDIA PLATFORMS FOR PURCHASING SUPPORT

**33%** OF AMERICANS SAY THEY'LL SHOP CROSS-BORDER MORE IN THE NEXT 12 MONTHS

**28%** OF CANADIANS STILL BUY BOOKS ONLINE COMPARED TO 19% WORLDWIDE



# LATIN AMERICA

## LATAM FAVORS SUSTAINABLE, CARED FOR, LOW-COST DELIVERIES

Latin American shoppers are big on sustainability – they are the most likely to say environmentally friendly delivery is important. They also trust their fellow shoppers to help them make the right choices – nearly all rely on peer reviews before buying.

Latin Americans insist on home delivery and see real-time shipment tracking as vital. High delivery costs and excessive customs charges are a big turn-off. And more than 1 in 4 returned their last purchase because it was damaged.



**95%** CHECK PRODUCT REVIEWS BEFORE BUYING

**87%** SAY NEXT-DAY DELIVERY IS IMPORTANT

**80%** SAY SUSTAINABLE DELIVERIES ARE IMPORTANT

**75%** WANT REAL-TIME TRACKING FOR CROSS-BORDER DELIVERIES

**59%** OF LATIN AMERICANS HAVE ABANDONED A PURCHASE DUE TO HIGH DELIVERY CHARGES

**57%** SAY THEY WON'T SHOP CROSS-BORDER DUE TO CUSTOMS CHARGES

**27%** RETURNED GOODS DUE TO DAMAGE IN TRANSIT



# GLOBAL CROSS-BORDER SHOPPING

Read on to discover the results in more detail

- **Global cross-border shopping** (pg. 14-23)  
What's driving global shoppers and what would encourage them to buy more
  - Delivery and returns
  - Sustainable e-commerce options
  - Online shopping landscape
  - Conclusions



# ONLINE SHOPPERS IN EACH REGION

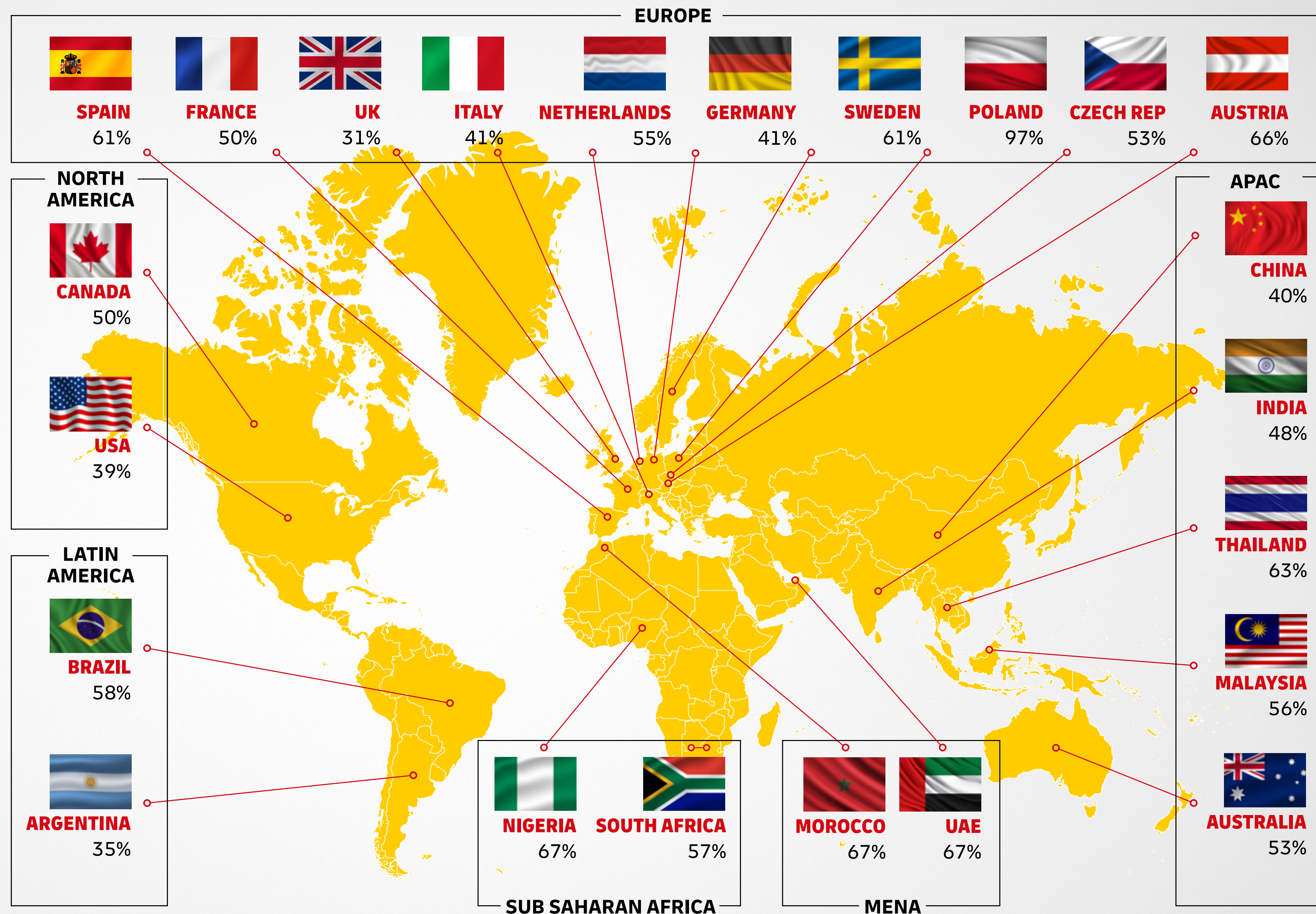
For e-commerce businesses with an international outlook, the good news is that, on average, **55% of the world's shoppers are happy to buy cross-border**.

Customers in MENA are the most adventurous, with **67% shopping abroad**. And in Europe, shoppers in Poland, Austria and Sweden are more likely to buy cross-border than shoppers in other European countries.

The most frequent cross-border shoppers are in APAC countries with **20% of Chinese and 23% of Thai shoppers buying at least once a day**. But UAE are the stand-out with **35% saying they buy cross-border every day**.

At **45%**, North Americans are, currently, the shoppers least likely to buy from other countries – presenting a great opportunity for entrepreneurial e-tailers.

Percentage of cross-border shoppers in each country





# WHERE DO SHOPPERS BUY WHEN THEY SHOP CROSS-BORDER?

There's a clear global pattern to how customers shop – reflecting the strength of global mega economies.

# 48%

OF THOSE WHO BUY CROSS-BORDER SAY THEY BUY GOODS FROM CHINA, AND 37% FROM THE US. THESE ARE, BY FAR, THE MAJOR BENEFICIARIES OF CROSS-BORDER SHOPPING

For more information on where European shoppers buy when they buy cross-border, [read the in-depth 2023 European Online Shopper Survey](#).

Respondents were offered multiple choice selection for this question. The top three choices are listed for each nation.





# WHAT MAKES PEOPLE ACROSS THE GLOBE BUY ONLINE FROM OTHER COUNTRIES?

Nearly 1 in 3 respondents said they bought products cross-border because they'd had a good experience before – demonstrating the power of good service to promote repeat business. And a surprisingly high number of shoppers said they bought cross-border because delivery was faster and less expensive than they expected!

## Why people choose to shop cross-border



**56%** OF CROSS-BORDER SHOPPERS IN SSA AND 48% IN MENA SAID 'BETTER QUALITY' IS WHY THEY BUY FROM OTHER NATIONS

Respondents were offered multiple choice selections for this question.

## Why choose to shop cross-border?

		The product or brand isn't available in my country	Lower price	Better-quality products	Delivery is faster	Low delivery costs	Previous good experience	Wider choice of products
AU		45%	43%	18%	5%	17%	26%	38%
CN		43%	21%	50%	14%	10%	31%	47%
IN		39%	30%	65%	27%	19%	39%	39%
MY		47%	52%	44%	25%	25%	38%	48%
TH		39%	44%	43%	23%	27%	30%	38%
AT		31%	45%	16%	21%	13%	29%	36%
CZ		32%	56%	23%	8%	22%	31%	36%
FR		28%	50%	12%	12%	19%	20%	29%
DE		32%	43%	17%	9%	16%	37%	31%
IT		33%	38%	18%	6%	14%	30%	32%
NL		34%	57%	13%	9%	15%	26%	30%
PL		32%	52%	25%	9%	24%	18%	40%
ES		32%	55%	22%	10%	23%	25%	26%
SE		35%	54%	13%	10%	18%	26%	35%
UK		30%	45%	24%	12%	17%	24%	29%
AR		41%	43%	37%	9%	20%	30%	47%
BR		30%	63%	32%	16%	34%	40%	55%
MA		32%	56%	48%	15%	24%	50%	34%
AE		36%	39%	48%	25%	26%	40%	39%
CA		42%	45%	18%	12%	22%	28%	41%
US		29%	43%	28%	24%	22%	39%	33%
NG		37%	42%	67%	23%	24%	43%	48%
ZA		37%	42%	44%	18%	19%	39%	45%
Global average		35%	47%	32%	15%	21%	32%	38%



# FREQUENCY: HOW OFTEN DOES THE WORLD BROWSE OR SHOP?

On average, **30%** of global shoppers **purchase goods online once a month**, **26% once a week** and **22% two to three times a week**.

## WHEN IT COMES TO BROWSING VS BUYING

<b>35%</b> of shoppers tend to browse online two or three times a week	<b>28%</b> of Latin Americans and Sub-Saharan Africans browse more than once a day	<b>25%</b> of Asian Pacific shoppers browse more than once a day	Europeans browse least, only <b>14%</b> look every day
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The most prolific online shoppers are those in Thailand and the UAE – 12% said they actually bought something online cross-border at least once a day! Worth considering if you’re looking for new markets.

If you’re considering expanding into these markets, head to page 56 to reach out to one of our international delivery specialists in your country.

### Frequency of online purchases

	More than once a day	Once a day	2-3 times a week	Once a week	Once a month	Less than once a month
AU	2%	4%	12%	24%	39%	20%
CN	10%	10%	49%	21%	8%	2%
IN	7%	5%	27%	29%	26%	5%
MY	5%	5%	28%	27%	27%	8%
TH	12%	11%	30%	21%	22%	5%
AT	5%	9%	18%	25%	38%	5%
CZ	3%	5%	13%	31%	34%	14%
FR	5%	5%	17%	22%	32%	18%
DE	3%	6%	16%	27%	34%	13%
IT	4%	5%	20%	23%	37%	11%
NL	4%	5%	15%	29%	32%	15%
PL	2%	5%	23%	34%	28%	9%
ES	5%	5%	17%	28%	33%	12%
SE	3%	5%	17%	26%	33%	15%
UK	3%	6%	16%	27%	33%	15%
AR	3%	4%	20%	29%	34%	10%
BR	5%	5%	20%	26%	30%	14%
MA	5%	6%	28%	22%	30%	9%
AE	12%	13%	31%	21%	17%	5%
CA	4%	6%	17%	25%	33%	15%
US	6%	10%	23%	26%	25%	10%
NG	7%	7%	30%	20%	27%	9%
ZA	3%	2%	16%	24%	40%	14%
Global average	5%	6%	22%	26%	30%	11%


























# WHAT WOULD IMPROVE THE ONLINE SHOPPING EXPERIENCE?

Free delivery – the key improvement **65% of shoppers worldwide want to see**. Faster deliveries would also be popular!

## Top ways online shopping could be improved



## What frustrates you when you shop online?

		Not finding the product I want	Sites that are not user-friendly	Having to pay for returns	Not being offered preferred payment options	Unable to ask for advice	Long delivery times	High delivery costs	Not being able to choose delivery provider	Complicated ordering process
AU		30%	31%	35%	23%	27%	53%	61%	16%	18%
CN		38%	24%	39%	28%	24%	50%	28%	23%	29%
IN		36%	33%	30%	24%	31%	50%	50%	22%	23%
MY		36%	30%	31%	27%	23%	59%	60%	34%	25%
TH		30%	23%	23%	21%	21%	55%	60%	27%	22%
AT		24%	30%	38%	28%	18%	37%	56%	20%	21%
CZ		22%	23%	25%	21%	18%	24%	55%	16%	14%
FR		27%	16%	43%	16%	29%	33%	53%	19%	15%
DE		30%	32%	39%	40%	18%	40%	47%	22%	30%
IT		29%	25%	36%	23%	16%	39%	50%	20%	12%
NL		25%	26%	38%	14%	20%	31%	43%	19%	17%
PL		24%	21%	43%	26%	24%	43%	34%	23%	15%
ES		33%	20%	41%	23%	19%	48%	47%	19%	20%
SE		24%	24%	37%	23%	17%	39%	57%	21%	18%
UK		25%	26%	39%	12%	21%	34%	56%	23%	17%
AR		18%	24%	25%	33%	26%	44%	62%	18%	13%
BR		36%	38%	37%	29%	14%	62%	65%	14%	26%
MA		21%	25%	42%	29%	22%	47%	56%	17%	29%
AE		33%	23%	35%	28%	26%	45%	46%	21%	26%
CA		30%	25%	40%	16%	22%	43%	55%	20%	13%
US		31%	32%	33%	15%	24%	37%	49%	18%	23%
NG		29%	43%	32%	35%	27%	66%	62%	21%	31%
ZA		36%	40%	41%	26%	35%	58%	53%	25%	25%
Global average		29%	28%	36%	24%	23%	45%	52%	21%	21%

## Online shopping frustrations

High delivery costs are the No.1 turn-off. **63% of Latin Americans, 57% of Sub-Saharan Africans,** and over

**50%** of all other respondents said the same.

But there are differences between the regions.

**67% of SSA** shoppers want faster delivery times. And 41% say sites are not user friendly. **36% of shoppers in LATAM and SSA, and 33% in Asia,** want better website security.

**And in APAC,** shoppers also want more secure payment options, improved customer service, better product images and simpler browsing options.

Respondents were offered multiple choice selection for this question.



# WHAT STOPS GLOBAL SHOPPERS FROM BUYING FROM ABROAD?

IN EQUAL  
FIRST PLACE

48%

OF GLOBAL SHOPPERS  
CITED **FRAUD  
AND LONGER WAIT  
TIMES** AS NO.1 REASON  
FOR NOT BUYING  
CROSS-BORDER



CUSTOMS  
CHARGES IS A  
CLOSE SECOND AT

41%



Being upfront on your site about the security measures in place is a sure fire way to secure more sales and make your buyers feel safe. If you show your cross-border delivery lead times, customs charges that might be applicable by the buyer and have a clear returns policy you can take a browser into a buyer.



62%

SUB-SAHARAN AFRICANS  
ARE THE MOST WORRIED  
ABOUT FRAUD  
and they're also most put off by  
slow deliveries at 63%

57%

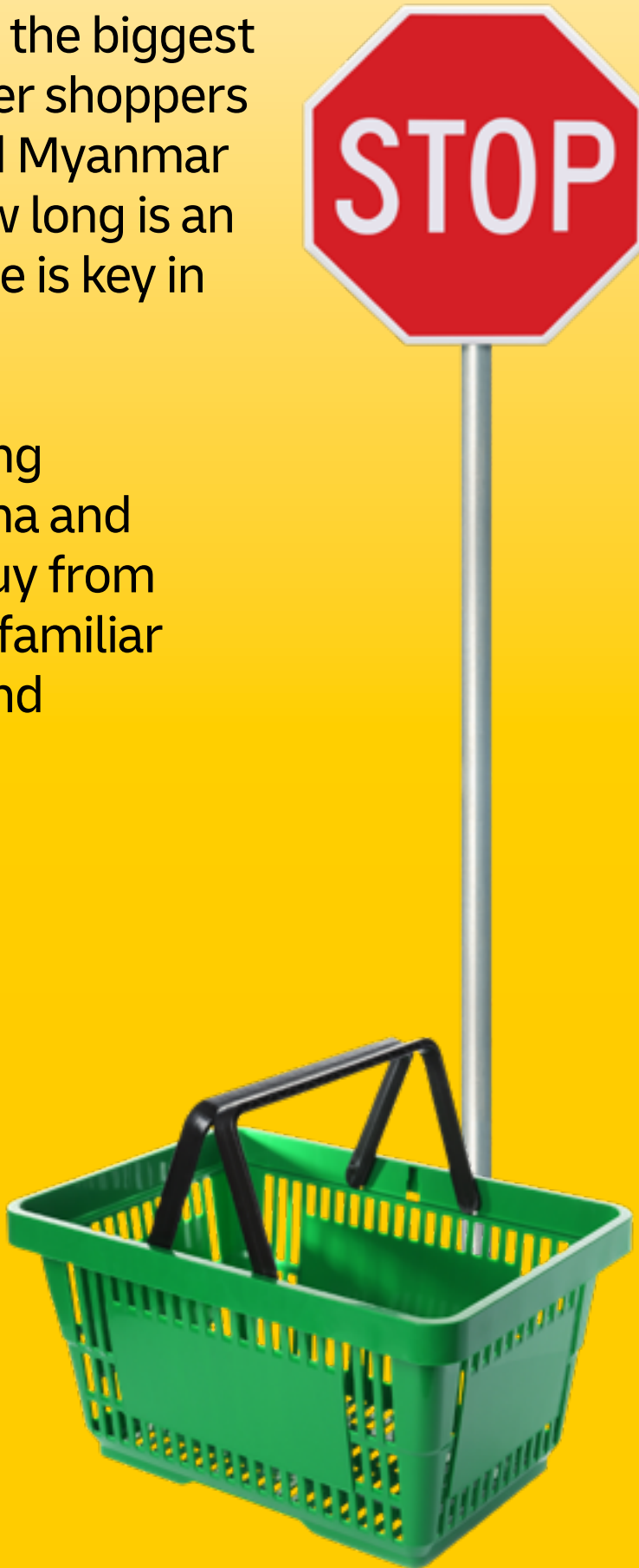
OF LATIN AMERICANS  
are deterred by customs charges


























# WHAT STOPS GLOBAL SHOPPERS FROM BUYING FROM ABROAD?

Waiting for deliveries is the biggest turn-off for cross-border shoppers in Thailand, Nigeria and Myanmar – so understanding how long is an acceptable delivery time is key in local markets.

Shoppers in fast growing economies such as China and India are reluctant to buy from businesses who use unfamiliar delivery providers. Brand recognition matters.



		Customs charges	I prefer to support the economy in my own country	Longer delivery time	Returns costs	I can find everything I need in my own country	Complex returns process	Unfamiliar delivery provider	Data protection and security	Limited payment options	Language barrier	Lack of simple 'track and trace'	Unsure about different consumer protection laws	Fear of fraud
AU		26%	43%	58%	26%	35%	20%	21%	25%	15%	7%	25%	16%	46%
CN		27%	28%	36%	25%	39%	24%	36%	26%	17%	31%	14%	23%	32%
IN		35%	35%	50%	35%	46%	38%	31%	24%	31%	14%	22%	26%	51%
MY		41%	35%	63%	25%	45%	28%	18%	32%	23%	16%	17%	26%	65%
TH		37%	22%	66%	20%	27%	23%	34%	25%	24%	31%	16%	22%	52%
AT		42%	24%	34%	34%	34%	18%	15%	19%	24%	14%	17%	17%	43%
CZ		44%	22%	34%	24%	38%	38%	31%	22%	17%	30%	7%	23%	48%
FR		30%	38%	34%	28%	43%	23%	12%	28%	10%	21%	12%	21%	45%
DE		57%	33%	46%	37%	39%	38%	31%	24%	22%	22%	23%	23%	61%
IT		35%	23%	42%	22%	35%	19%	13%	16%	10%	15%	12%	19%	43%
NL		32%	29%	38%	18%	45%	26%	13%	16%	14%	10%	15%	18%	34%
PL		25%	25%	31%	25%	13%	19%	19%	6%	6%	44%	19%	25%	31%
ES		34%	32%	40%	30%	27%	26%	17%	14%	8%	16%	10%	18%	45%
SE		51%	31%	45%	28%	35%	21%	23%	24%	17%	10%	17%	21%	40%
UK		39%	35%	50%	34%	33%	24%	15%	18%	10%	10%	21%	20%	42%
AR		61%	16%	47%	13%	15%	24%	21%	13%	23%	10%	17%	23%	55%
BR		51%	23%	53%	21%	32%	26%	13%	25%	12%	17%	23%	21%	51%
MA		69%	24%	53%	30%	30%	37%	13%	18%	22%	11%	10%	31%	49%
AE		33%	19%	53%	29%	33%	27%	19%	25%	15%	13%	12%	23%	50%
CA		56%	34%	51%	42%	32%	28%	19%	20%	9%	12%	19%	16%	40%
US		19%	35%	46%	24%	35%	18%	20%	24%	11%	15%	20%	19%	48%
NG		43%	25%	64%	18%	18%	22%	29%	11%	28%	17%	22%	22%	62%
ZA		50%	35%	61%	38%	28%	30%	28%	22%	19%	9%	23%	27%	61%
Global average		41%	29%	48%	27%	34%	26%	22%	21%	17%	16%	17%	21%	48%

Respondents were offered multiple choice selection for this question.



# WHAT WOULD ENCOURAGE SHOPPERS TO BUY MORE CROSS-BORDER?

There are some simple steps online retailers can take to drive more cross-border sales.

FIRSTLY, ONLINE PRICING IN LOCAL CURRENCIES GIVES

50% OF OUR RESPONDENTS THE REASSURANCE THEY'RE LOOKING FOR

A free and simple returns policy would also satisfy 49% of those surveyed.



And clear information on customs charges would convince a further 47% to shop abroad more.



Returning goods to another country can be a major concern for shoppers. Ensure you explain how cross-border returns work clearly and simply on your site – and ideally, include a returns label with goods.

## What would give you the confidence and reassurance to shop cross-border?

		Website in native language	Prices in own currency	Simple, free returns	Clear guidance on customs and duties charges	Transparent consumer rights	Carbon off-setting	Well-packaged goods
AU		20%	63%	47%	40%	27%	8%	34%
CN		47%	52%	48%	51%	53%	12%	24%
IN		32%	62%	57%	49%	45%	22%	56%
MY		25%	58%	47%	50%	45%	12%	56%
TH		41%	49%	44%	37%	37%	15%	53%
AT		35%	41%	46%	44%	21%	17%	33%
CZ		38%	43%	46%	46%	22%	7%	20%
FR		36%	43%	48%	33%	24%	14%	28%
DE		39%	42%	48%	51%	27%	15%	30%
IT		30%	43%	48%	41%	31%	14%	24%
NL		39%	36%	51%	41%	19%	8%	24%
PL		41%	55%	49%	46%	29%	9%	22%
ES		28%	41%	55%	45%	28%	9%	27%
SE		30%	46%	48%	51%	24%	15%	22%
UK		25%	52%	50%	41%	26%	14%	28%
AR		32%	56%	48%	66%	28%	5%	27%
BR		32%	53%	50%	60%	44%	13%	40%
MA		23%	38%	43%	45%	43%	6%	42%
AE		26%	44%	47%	41%	42%	18%	42%
CA		22%	59%	52%	53%	25%	13%	30%
US		28%	49%	44%	35%	29%	15%	31%
NG		15%	56%	49%	55%	54%	6%	50%
ZA		20%	61%	53%	64%	41%	11%	40%
Global average		31%	50%	49%	47%	33%	12%	34%

Respondents were offered multiple choice selection for this question.



# WHAT THE WORLD BUYS ONLINE

**On average, over 60% of global shoppers buy clothing and footwear when they shop cross-border – the top category.**

Around a third of global shoppers buy electronics. And cosmetics, sports and leisure goods are popular with 24% of the global population.

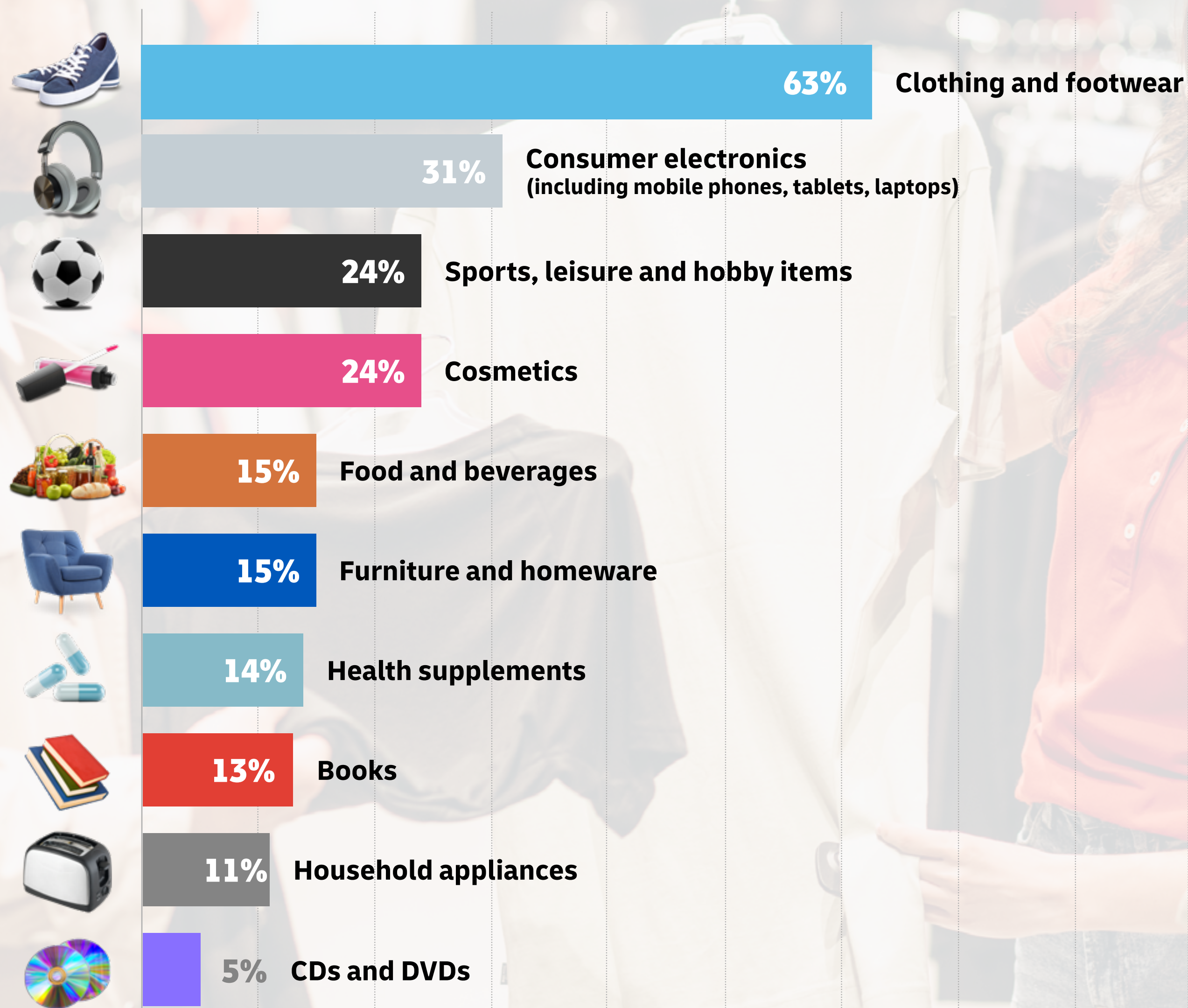
**Across the categories, regional differences are much more noticeable:**

APAC, MENA and North America buy more food and beverage than other regions and SSA buys more books.



Seasonal holidays are peak selling periods for cross-border online businesses – especially fashion and home electronics. Although the Black Friday/Cyber Monday concept has been adopted around the world, national and religious holidays – such as Diwali and Ramadan – are also big buying times. And the Singles Day concept (11/11) started in China, is rapidly growing worldwide, too. So be aware of local market celebrations and holidays to promote offers.

The top product categories for cross-border purchases are:




































Respondents were offered multiple choice selection for this question.



# WHAT THE WORLD BUYS ONLINE

What types of products do people buy when they shop cross-border\*?

Globally, we can see how shopping habits vary. 49% of Nigerians are happy to buy consumer electronics online, but Germans are more wary at only 17%. If you have a clothing e-store, the South African market has your most enthusiastic buyers.

											
AU		62%	11%	19%	11%	20%	19%	13%	18%	8%	6%
CN		47%	33%	38%	17%	27%	40%	22%	10%	7%	8%
IN		76%	31%	41%	18%	27%	39%	25%	22%	6%	17%
MY		71%	18%	35%	19%	19%	30%	13%	14%	4%	23%
TH		68%	24%	35%	17%	21%	26%	21%	7%	4%	15%
AT		60%	10%	23%	12%	29%	19%	14%	13%	6%	8%
CZ		59%	7%	30%	18%	26%	16%	10%	6%	5%	8%
FR		64%	10%	29%	15%	22%	17%	9%	9%	7%	6%
DE		58%	19%	17%	17%	25%	14%	8%	10%	2%	4%
IT		59%	14%	27%	16%	23%	18%	13%	12%	5%	4%
NL		55%	14%	19%	11%	32%	21%	11%	9%	3%	7%
PL		62%	6%	33%	14%	25%	28%	9%	12%	10%	12%
ES		57%	9%	38%	15%	22%	16%	6%	9%	4%	12%
SE		64%	18%	18%	12%	25%	16%	11%	10%	5%	3%
UK		61%	25%	21%	13%	25%	18%	13%	9%	7%	6%
AR		65%	6%	43%	13%	26%	18%	5%	12%	5%	11%
BR		66%	6%	43%	11%	28%	33%	10%	10%	3%	10%
MA		71%	11%	34%	17%	22%	21%	17%	13%	3%	17%
AE		62%	30%	33%	28%	25%	35%	26%	17%	7%	7%
CA		59%	14%	23%	14%	21%	21%	10%	15%	9%	8%
US		55%	28%	29%	20%	26%	29%	17%	15%	6%	6%
NG		67%	13%	49%	6%	18%	25%	22%	21%	5%	24%
ZA		78%	10%	31%	14%	20%	19%	10%	14%	3%	12%
Global average		63%	15%	31%	15%	24%	24%	14%	13%	5%	11%

Respondents were offered multiple choice selection for this question.



## CROSS-BORDER SHOPPING

# WHAT THE SURVEY RESULTS MEAN FOR YOUR BUSINESS

Every year, the number of cross-border shopping converts grows – driven primarily by clothing and footwear. And keep a watch on beauty and lifestyle products as these markets continue to accelerate on subscription (see page 49).

Half of all shoppers want to see pricing in their own currency. This is not only about convenience – it's also a hedge against fraud – a major concern for 1 in 2 shoppers. And 4 in 10 of your global customers want clear, detailed product descriptions in their own language. Obviously, translating for every nation is a challenge. But around half of the world have English, Mandarin Chinese, Hindi and Spanish as a first or second language.

With concerns around online fraud and scamming sites, it's not surprising that secure online payment options are vital to making sales. Credit and debit card payments are still the No.1 choice around the world but the ability to use a digital wallet that's familiar in their own region is the key to securing more international customers (see page 51 for more details).



**Pablo Ciano**  
CEO – DHL eCommerce

*“There are huge opportunities waiting for e-commerce businesses to secure sales all over the globe, not just domestically. For e-tailers looking to make that leap into cross-border shipping it's important to meet the needs of the customers, in the country you want to ship to. It's not a one size fits all. The insights in this report can take a browser into a buyer.”*





# DELIVERY AND RETURNS

Read on to discover the results in more detail

- ☐ Global cross-border shopping
- ☒ **Delivery and returns** (pg. 26-37)  
Charges, options and improvements – how the world views delivery
- ☐ Sustainable e-commerce options
- ☐ Online shopping landscape
- ☐ Conclusions



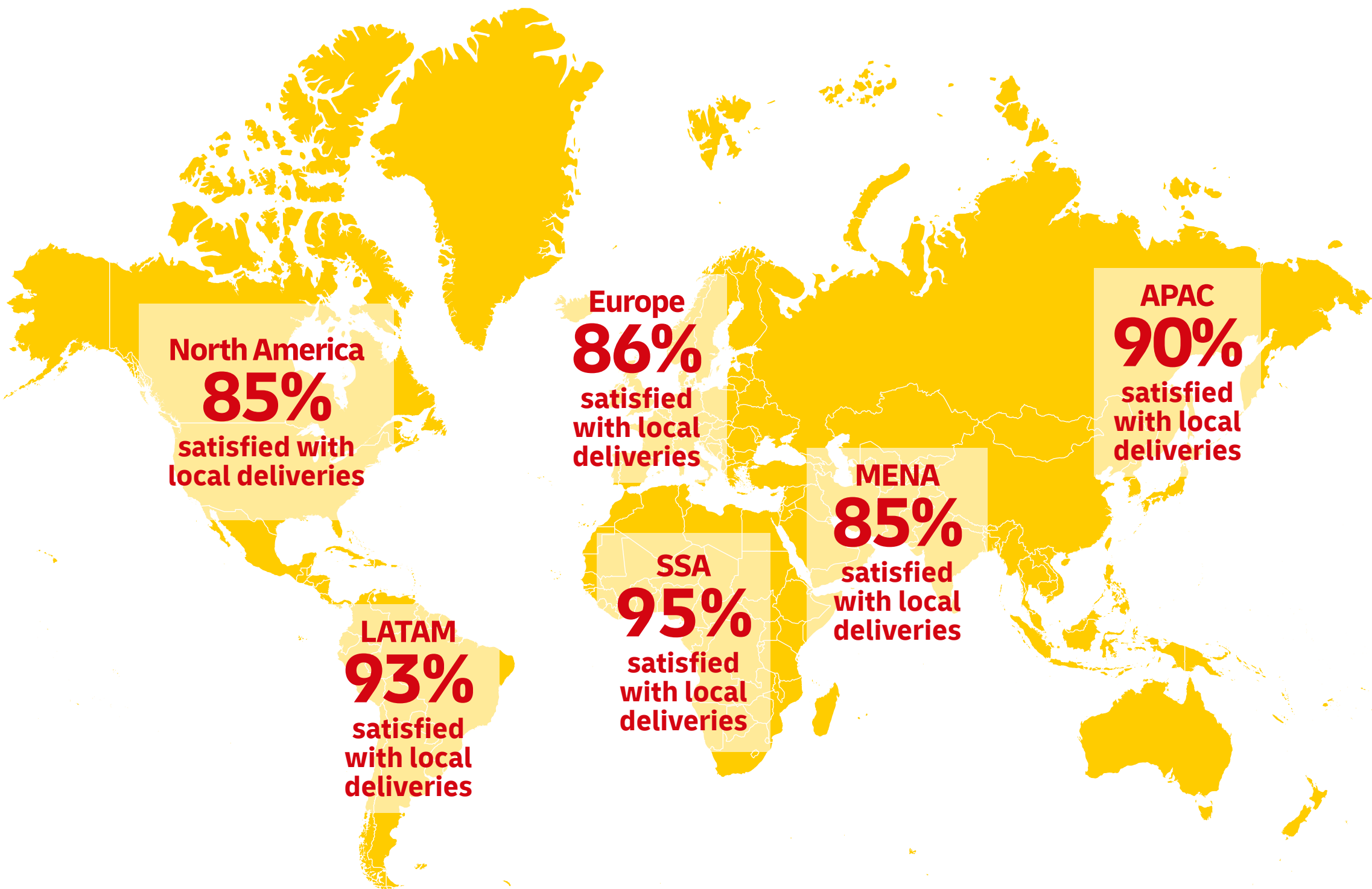


# DELIVERING... AT HOME AND ABROAD

Whether cross-border or domestic, online shoppers are generally satisfied with the delivery services they're offered.

**Regionally, for local deliveries, at 95%, shoppers in SSA are the most satisfied** whilst the **least satisfied** are shoppers in **MENA and North America** (85%).

**90% of shoppers in SSA are the most satisfied with their cross-border deliveries** and **North American shoppers the least** at just 76%. Regional differences in 'shopper expectations' may play a part here.



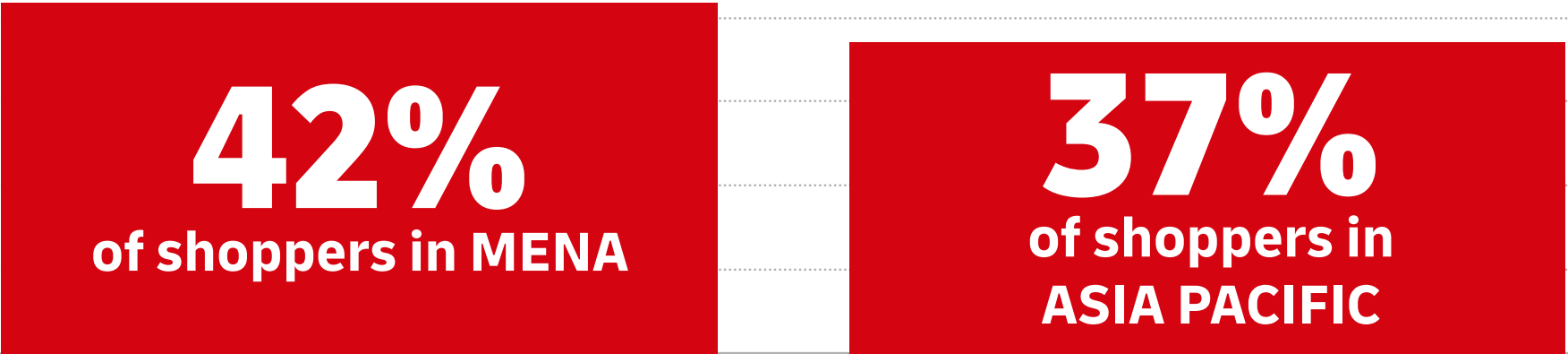
## Are you satisfied with your deliveries?

		Net satisfaction with domestic delivery (quite and very satisfied)	Net satisfaction with cross-border delivery (quite and very satisfied)
AU		84%	81%
CN		88%	87%
IN		97%	95%
MY		88%	86%
TH		92%	91%
AT		84%	81%
CZ		84%	81%
FR		86%	84%
DE		85%	81%
IT		89%	88%
NL		86%	81%
PL		89%	87%
ES		88%	90%
SE		82%	83%
UK		90%	86%
AR		94%	92%
BR		92%	88%
MA		87%	81%
AE		83%	84%
CA		86%	81%
US		83%	85%
NG		95%	91%
ZA		94%	90%
Global average		88%	85%



# WHETHER TO SHOW DELIVERY CHARGES OR NOT?

Free delivery isn't a deal breaker, but...



ONLY BUY from sellers who provide it.

And in Europe, **37% of Spanish**, and **35% of Italians and Austrians**, refuse to pay extra for delivery.

Overall  
**55%**  
of shoppers want delivery charges rolled into the cost of their goods.

**But** in regions like Latin America and SSA, people generally want to see delivery options at check out.

## The ‘myth’ of free delivery

We all know that there is no such thing as ‘free delivery’. Transporting goods is a cost of doing e-commerce, and needs to be paid for. It’s how those delivery costs are presented to the customer that matters.

**49%**  
of shoppers sometimes buy from sites not offering free delivery.



	Prefer cost to be included in item cost	Prefer to see delivery options at checkout
AU	55%	45%
CN	72%	28%
IN	60%	40%
MY	45%	55%
TH	70%	30%
AT	61%	39%
CZ	53%	47%
FR	60%	40%
DE	57%	43%
IT	60%	40%
NL	63%	37%
PL	36%	64%
ES	72%	28%
SE	53%	47%
UK	55%	45%
AR	47%	53%
BR	41%	59%
MA	48%	52%
AE	62%	38%
CA	52%	48%
US	52%	48%
NG	43%	57%
ZA	51%	49%
Global average	55%	45%



# WHAT IMPROVEMENTS DO SHOPPERS WANT?

Despite generally high scores for delivery services, there is still room for improvement. Obviously, free delivery would make shoppers feel better about buying online. But speed of delivery is also a big opportunity globally...

WITH  
**43%** OF SHOPPERS SAYING THEY WANT IT TO BE FASTER



The improvements shoppers are looking for are not exceptional. They are straightforward service levels that reputable delivery companies should provide. Consider how many more sales you could secure if you made free delivery an option, given it's a high priority for shoppers!

Consider rolling the cost of the delivery into your product prices and partnering with a delivery provider such as DHL eCommerce. Head to page 56 to reach out to one of our international delivery specialists in your country.

## What would improve your online shopping experience\*?

		Faster delivery of my purchases	Free delivery	Free returns	Better site security	More secure payment process	Better customer service	Higher-quality product images	Better product descriptions	Simpler browsing options
AU		49%	73%	40%	19%	23%	18%	33%	38%	30%
CN		42%	48%	45%	34%	43%	46%	36%	58%	32%
IN		62%	68%	47%	37%	45%	55%	53%	54%	39%
MY		52%	66%	28%	40%	59%	43%	43%	51%	25%
TH		46%	70%	43%	36%	48%	43%	41%	42%	40%
AT		36%	66%	42%	17%	39%	24%	29%	31%	12%
CZ		35%	65%	26%	10%	19%	20%	25%	39%	31%
FR		33%	65%	43%	26%	28%	21%	25%	36%	20%
DE		32%	63%	40%	23%	32%	24%	22%	32%	25%
IT		29%	61%	40%	26%	32%	28%	25%	33%	19%
NL		28%	62%	43%	14%	17%	23%	21%	31%	19%
PL		41%	71%	48%	26%	25%	17%	31%	43%	30%
ES		37%	61%	45%	26%	31%	25%	31%	42%	19%
SE		39%	70%	52%	18%	26%	24%	29%	37%	13%
UK		30%	75%	47%	17%	18%	22%	32%	30%	25%
AR		41%	69%	33%	25%	30%	26%	33%	46%	17%
BR		55%	77%	32%	48%	38%	31%	38%	37%	27%
MA		47%	55%	35%	33%	48%	38%	38%	37%	44%
AE		48%	54%	40%	30%	45%	36%	45%	41%	28%
CA		41%	72%	50%	21%	21%	23%	33%	35%	23%
US		39%	59%	34%	25%	25%	27%	37%	36%	31%
NG		72%	56%	31%	38%	53%	49%	46%	50%	22%
ZA		61%	65%	42%	34%	41%	31%	41%	45%	35%
Global average		43%	65%	40%	27%	34%	30%	34%	40%	27%

\*Respondents were offered multiple choice selection for this question.



# RECIPIENT-LED DELIVERY CHOICES

Home delivery is NOT the only option

With hybrid working now the norm for many people, the demand for more flexible last-mile delivery services has ramped up in 2023.


























...rising to  
**92%**  
in Latin America

**73%**  
↓  
**64%**

However, in Europe a preference for home delivery has dropped **from 73% to 64% in just one year**, coinciding with a rise in **parcel locker (14%)** and **safe place (22%)** deliveries.

At a global level, this could herald a significant change in shopping habits!

## Worldwide delivery location preferences

	Home delivery	Left with a neighbor or safe place	Parcel locker	Parcel shop/ convenience store
AU 	85%	8%	5%	2%
CN 	55%	10%	22%	13%
IN 	92%	5%	2%	0%
MY 	86%	8%	4%	2%
TH 	91%	6%	2%	1%
AT 	70%	15%	11%	4%
CZ 	49%	10%	18%	22%
FR 	63%	10%	8%	20%
DE 	76%	14%	8%	2%
IT 	72%	14%	9%	4%
NL 	74%	12%	5%	9%
PL 	38%	7%	<b>49% *</b>	7%
ES 	74%	12%	6%	7%
SE 	45%	12%	22%	21%
UK 	81%	12%	4%	3%
AR 	88%	3%	2%	6%
BR 	95%	2%	1%	1%
MA 	90%	4%	6%	1%
AE 	76%	17%	6%	1%
CA 	83%	10%	5%	2%
US 	84%	9%	6%	2%
NG 	88%	2%	1%	9%
ZA 	91%	2%	2%	5%
Global average	<b>76%</b>	<b>9%</b>	<b>9%</b>	<b>6%</b>



\*The increasing preference for parcel lockers and safe places points to a rising desire for flexible delivery options worldwide. For instance, offering a parcel locker option in Poland where it is their preferred delivery location is a no brainer! DHL eCommerce has a global network of over 100,000 Access Points – and has the largest out of home network in Europe! Are you offering your shoppers convenience that fits with their lifestyle? [Read more here.](#)



# IN-FLIGHT SERVICES TAKE OFF!

Flexible deliveries are becoming more and more important to your customers.

ONCE A PARCEL IS ON ITS WAY

75%

OF ALL RESPONDENTS WANT THE ABILITY TO REDIRECT IT TO A SAFE PLACE – **BY FAR THE MOST IMPORTANT ‘IN-FLIGHT SERVICE’**

AND

65%

OF OUR GLOBAL RESPONDENTS WANT TO BE ABLE TO CHANGE THE DATE OF DELIVERY

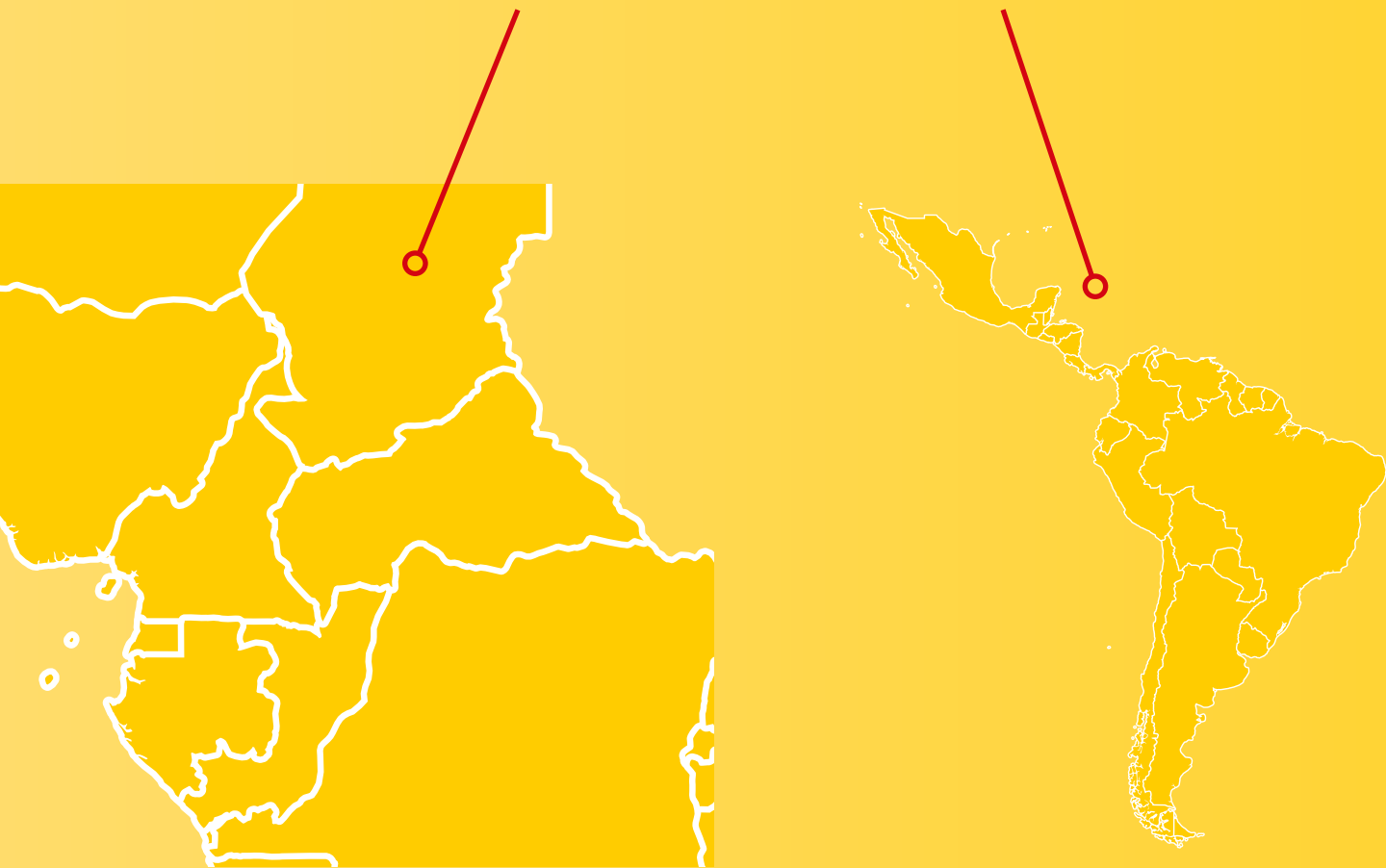


# DELIVERY OPTIONS MAKES THE DIFFERENCE

Being offered a wide range of delivery options such as home delivery, safe space, alternative address and different day is crucial...

**However, the vast majority of online retailers are serving their customers well** with 86% of shoppers saying they were satisfied with the delivery options offered when they bought an item in their own country and 79% saying the same when they made a purchase from a different country.

**Those most satisfied with their cross-border delivery options were in SSA (87%) and Latin America (85%).**



		Net satisfaction with domestic delivery options	Net satisfaction with cross-border delivery options
AU		81%	67%
CN		87%	85%
IN		95%	86%
MY		86%	81%
TH		91%	89%
AT		81%	81%
CZ		81%	71%
FR		84%	78%
DE		81%	75%
IT		88%	83%
NL		81%	73%
PL		87%	72%
ES		90%	84%
SE		83%	68%
UK		86%	75%
AR		92%	85%
BR		88%	85%
MA		81%	81%
AE		84%	84%
CA		81%	66%
US		85%	73%
NG		91%	92%
ZA		90%	81%
Global average		86%	79%



# HOW DELIVERY OPTIONS IMPACT CART ABANDONMENT

Delivery options are a crucial factor in purchasing decisions.
























OVER  
**95%** OF GLOBAL SHOPPERS SAY  
THEY HAVE ABANDONED AN  
ONLINE PURCHASE BECAUSE THEY  
WERE NOT OFFERED A DELIVERY  
THAT SUITED THEM SUCH AS HOME  
DELIVERY, LEAVING GOODS WITH A  
NEIGHBOR OR IN A SAFE SPACE OR  
AT A PARCEL LOCKER/PARCEL SHOP

**95%** OF THOSE SURVEYED ALSO SAID  
THEY **CHOOSE WHERE TO SHOP**  
**BASED ON THE DELIVERY**  
**OPTIONS** OFFERED BY THE SELLER



In fact, **nearly 1 in 5 shoppers in APAC** say they **abandon their baskets very frequently** if not offered their **preferred delivery options**.



		Abandon basket if not offered their preferred delivery options*
AU		89%
CN		96%
IN		93%
MY		97%
TH		96%
AT		98%
CZ		96%
FR		93%
DE		96%
IT		95%
NL		97%
PL		96%
ES		95%
SE		95%
UK		92%
AR		97%
BR		96%
MA		95%
AE		96%
CA		96%
US		92%
NG		90%
ZA		93%
Global average		95%

\*All except those saying they never abandon their basket if not offered their preferred delivery options



# HOW DELIVERY PROVIDERS CAN MAKE OR BREAK YOUR SALE

Delivery providers also deliver on the bottom line!

**70%** OF GLOBAL SHOPPERS WANT TO KNOW WHO WILL DELIVER THEIR PARCEL BEFORE THEY CLICK THE 'CONFIRM PURCHASE' BUTTON AND 43% WOULD NOT BUY AN ITEM IF THEY DIDN'T TRUST THE DELIVERY PROVIDER!

In MENA, this rises to 81% with 61% prepared to abandon their purchase if they don't like the provider.

So, it makes sense for e-commerce businesses to offer shoppers a courier they trust.
























North Americans are more relaxed.  
ONLY

**62%** INSIST ON KNOWING THEIR SHIPPER UPFRONT – WHILST ONLY 35% WOULD CANCEL THE PURCHASE IF THEY DIDN'T TRUST THEM

## Importance of knowing delivery provider

APAC	76%
Europe	64%
LATAM	74%
MENA	81%
North America	62%
SSA	78%
Global average	70%

## How important is it for you to know who the delivery provider is before confirming your purchase?

	Net importance (quite and very)
AU 	55%
CN 	75%
IN 	80%
MY 	79%
TH 	92%
AT 	66%
CZ 	67%
FR 	70%
DE 	62%
IT 	67%
NL 	50%
PL 	65%
ES 	71%
SE 	68%
UK 	59%
AR 	84%
BR 	64%
MA 	83%
AE 	78%
CA 	62%
US 	62%
NG 	79%
ZA 	77%
Global average	70%



# DHL: THE DELIVERY PROVIDER SHOPPERS KNOW AND TRUST

DHL HAS THE HIGHEST GLOBAL AWARENESS OF ALL DELIVERY PROVIDERS WITH























81% OF SHOPPERS SAYING THEY KNOW THE BRAND

82% of these customers said they would trust DHL to deliver an item in their own country and 80% said they would trust DHL to deliver their purchase from abroad – the highest score with shoppers worldwide.

If you’re considering expanding into new markets, head to page 56 to reach out to one of our international delivery specialists in your country.



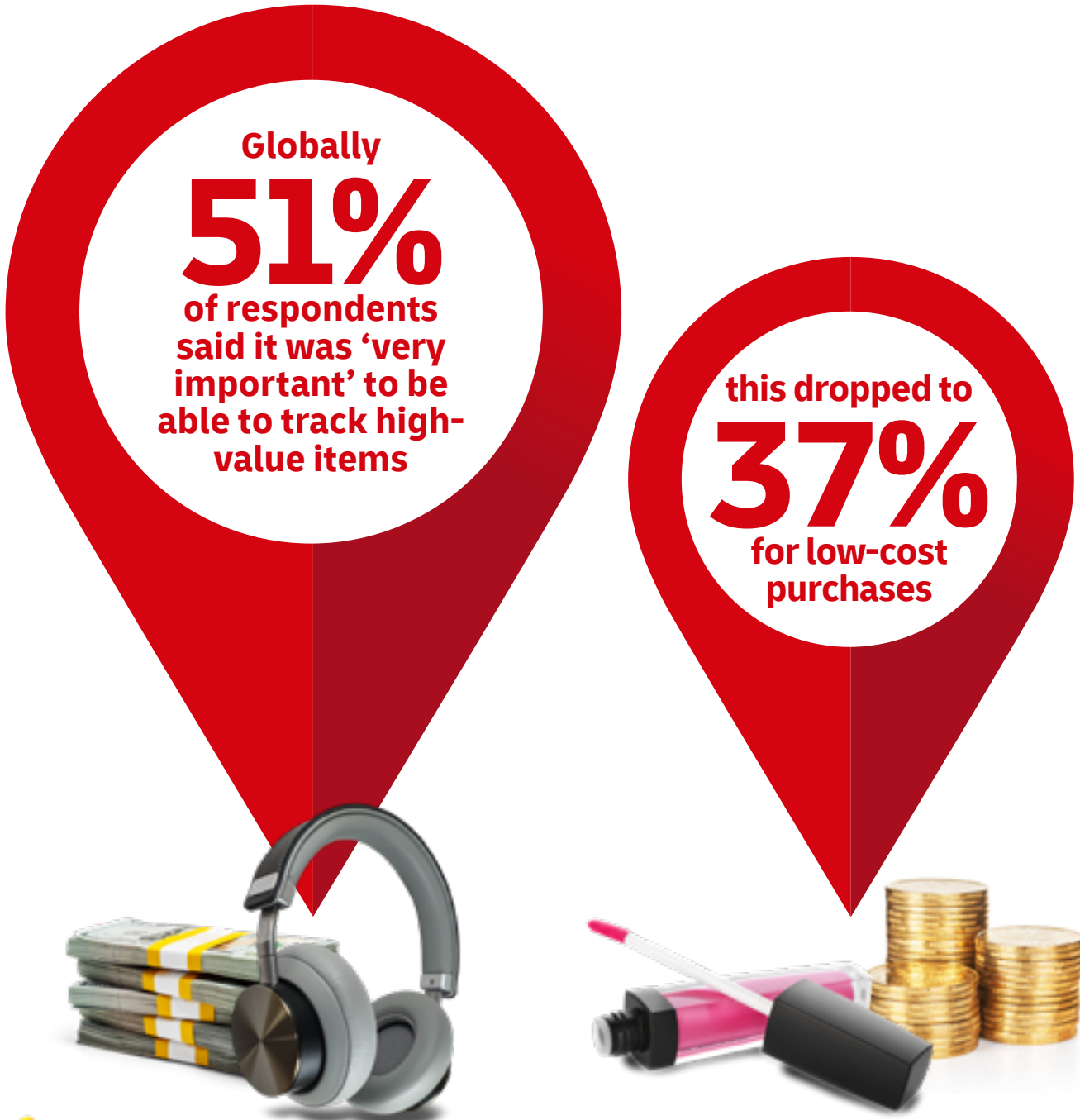
## Awareness and trust of DHL

	Awareness	Trust domestic (amongst those who are aware)	Trust cross-border (amongst those who are aware)
AU 	84%	73%	70%
CN 	29%	70%	75%
IN 	82%	91%	89%
MY 	92%	95%	95%
TH 	75%	84%	86%
AT 	96%	69%	66%
CZ 	84%	76%	78%
FR 	72%	69%	68%
DE 	96%	89%	84%
IT 	89%	79%	76%
NL 	98%	77%	77%
PL 	95%	78%	77%
ES 	88%	85%	84%
SE 	93%	84%	81%
UK 	90%	69%	63%
BR 	48%	84%	86%
MA 	73%	93%	94%
AE 	88%	87%	89%
CA 	74%	72%	67%
US 	68%	67%	66%
NG 	89%	98%	96%
ZA 	88%	95%	92%
Global average	81%	82%	80%

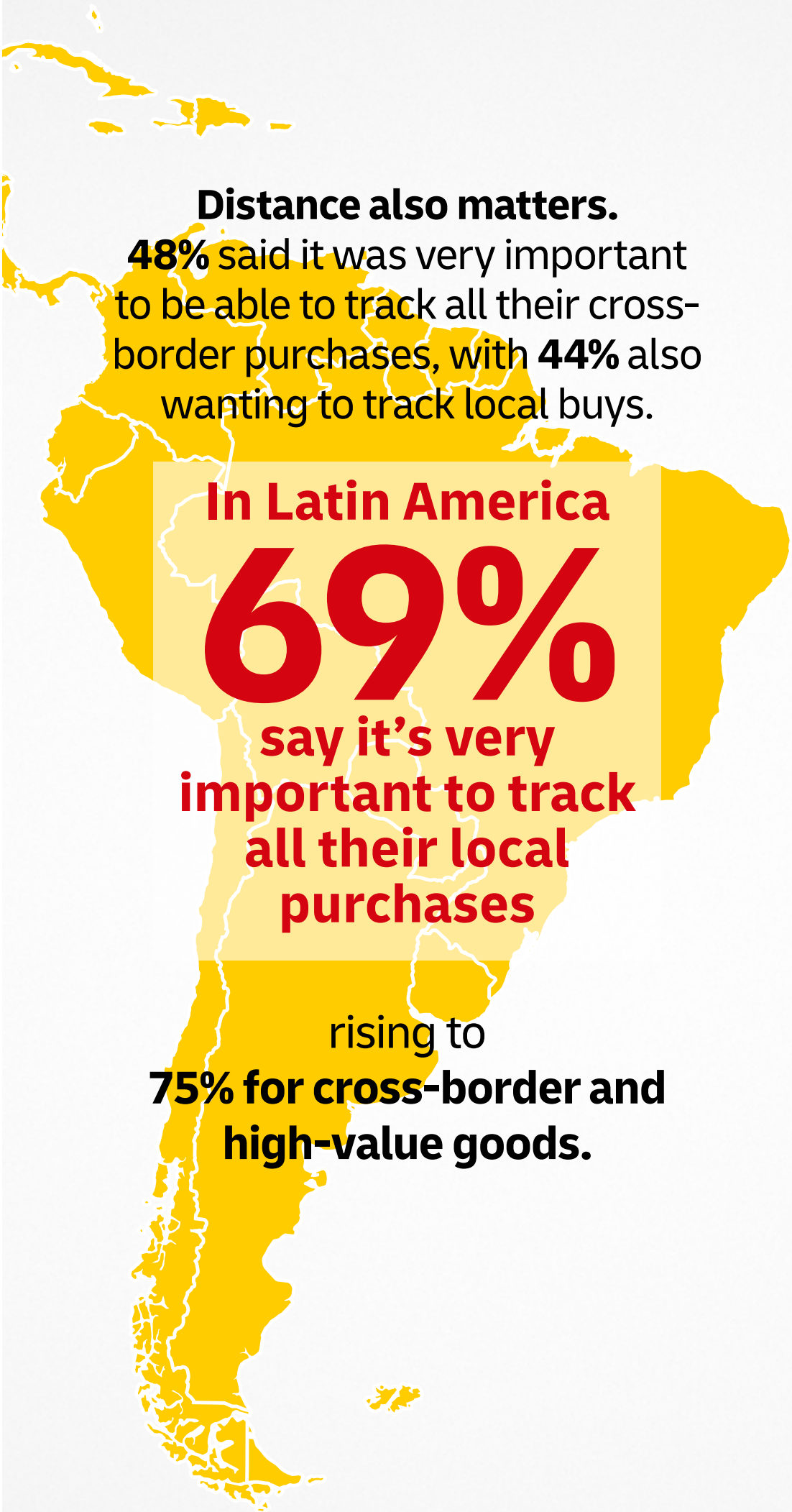


# WHY SHIPMENT TRACKING MATTERS

The value of a purchase – and where it is coming from – is directly linked to the importance of shipment tracking.



**EXPERT TIP** On average, the vast majority of your customers want to be able to track their goods – whether high value, cross-border or local. If you don’t work with a deliverer that provides tracking services, your customers may look elsewhere.



How important is it to have end-to-end tracking in the following situations?\* (net importance shown)

		Items purchased from retailers in your country	Items purchased from retailers in another country	Low-value items	High-value items	Items purchased as gifts
AU		84%	81%	77%	85%	84%
CN		81%	78%	62%	80%	86%
IN		92%	82%	84%	81%	84%
MY		87%	78%	77%	71%	80%
TH		90%	86%	86%	87%	86%
AT		78%	72%	71%	74%	75%
CZ		67%	67%	57%	72%	72%
FR		81%	74%	76%	77%	78%
DE		77%	70%	70%	71%	77%
IT		79%	69%	71%	73%	74%
NL		75%	72%	69%	80%	75%
PL		81%	75%	76%	74%	81%
ES		81%	76%	78%	80%	81%
SE		77%	79%	81%	84%	81%
UK		82%	82%	76%	84%	81%
AR		91%	90%	91%	92%	91%
BR		96%	94%	92%	92%	92%
MA		81%	80%	65%	65%	78%
AE		79%	73%	67%	75%	79%
CA		82%	80%	79%	87%	83%
US		81%	80%	79%	85%	83%
NG		94%	98%	87%	87%	94%
ZA		94%	93%	81%	80%	94%
Global average		83%	77%	74%	78%	82%

\*This includes 'Quite' and 'Very'.



# TRANSIT TIMES: DOES THE WORLD WANT NEXT-DAY DELIVERY?

Speed of delivery is a major consideration for shoppers in some regions – with next-day delivery a strong preference. In other regions, not so much.

67% of shoppers in SSA want faster delivery times – although this only matters to 34% of Europeans.

It's worth noting that 61% of shoppers said they'd like next-day delivery on all their purchases...but wouldn't want to pay for this.



The simple answer is...it's complicated. You may need to offer different transit periods depending on the region. If you're considering expanding into new markets, head to page 56 to reach out to one of our international delivery specialists in your country.

34%  
OF SHOPPERS  
IN EUROPE  
WANT FASTER  
DELIVERY TIMES

67%  
OF SHOPPERS IN  
SSA WANT FASTER  
DELIVERY TIMES

87%  
OF LATAM  
SHOPPERS  
SAY NEXT DAY  
DELIVERY IS  
IMPORTANT  
TO ME

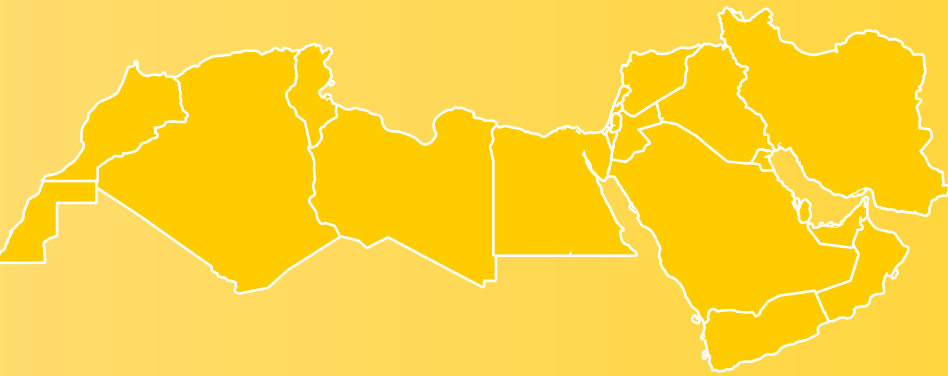
To what extent do you agree with the following?  
(Net agree: agree and strongly agree)

		Next-day delivery is important to me	Speed is not important to me as long as I am told when my item will arrive	I would like next-day delivery on all my purchases but I'm not willing to pay extra for this
AU		54%	65%	58%
CN		73%	48%	65%
IN		79%	65%	71%
MY		84%	57%	56%
TH		87%	68%	70%
AT		53%	64%	50%
CZ		44%	65%	52%
FR		61%	61%	63%
DE		49%	64%	36%
IT		70%	65%	65%
NL		54%	64%	61%
PL		72%	67%	75%
ES		71%	57%	66%
SE		47%	60%	52%
UK		50%	65%	66%
AR		84%	59%	67%
BR		90%	58%	65%
MA		81%	64%	71%
AE		78%	60%	66%
CA		53%	62%	62%
US		62%	61%	66%
NG		83%	66%	62%
ZA		75%	61%	53%
Global average		67%	62%	61%



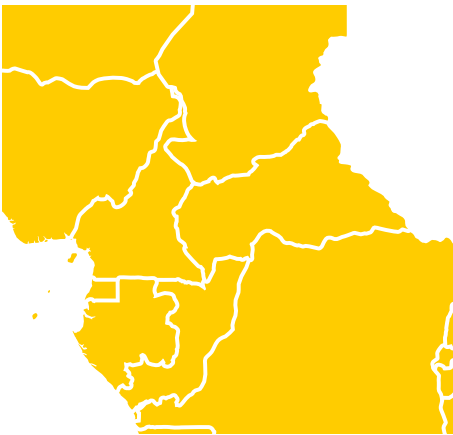
# FREE RETURNS: THE BIG SALES OPPORTUNITY

Free returns are a big selling point for many cross-border shoppers.



**In MENA, that number rose to 58%** – so if you’re selling to this region, it may well be worth considering wrapping the cost of returns into your overall product or delivery pricing.

Sub-Saharan Africa shoppers are the most relaxed about free returns with 27% saying it doesn’t matter if they really want the product.



Making the return process easy is key to customer satisfaction. **73% of global shoppers want returns labels included with their goods.** Only 7% of shoppers in SSA, and 15% in MENA and APAC are prepared to print their own labels. **So, if you want repeat business, add the label to the package.**

## Importance of free returns

		Being offered free returns isn't important to me if I want the item	I only buy from online shops that offer free returns	I will sometimes buy from shops that do not offer free returns
AU		27%	23%	50%
CN		24%	37%	39%
IN		11%	63%	25%
MY		14%	43%	43%
TH		23%	46%	31%
AT		14%	51%	35%
CZ		28%	28%	44%
FR		17%	42%	41%
DE		17%	43%	40%
IT		11%	52%	37%
NL		20%	37%	43%
PL		19%	24%	58%
ES		9%	52%	38%
SE		18%	35%	47%
UK		18%	30%	53%
AR		15%	45%	40%
BR		16%	48%	37%
MA		15%	61%	24%
AE		13%	56%	31%
CA		15%	41%	44%
US		15%	38%	46%
NG		36%	39%	25%
ZA		17%	42%	41%
Global average		18%	42%	40%

## Returns labels

		Print label in store	Print label at home	Returns label included
AU		6%	23%	72%
CN		10%	9%	81%
IN		3%	12%	85%
MY		7%	18%	75%
TH		10%	13%	78%
AT		6%	31%	63%
CZ		9%	22%	69%
FR		6%	32%	61%
DE		7%	24%	68%
IT		5%	27%	67%
NL		11%	21%	68%
PL		7%	25%	68%
ES		5%	20%	75%
SE		8%	19%	73%
UK		9%	22%	70%
AR		4%	22%	74%
BR		5%	17%	78%
MA		8%	10%	81%
AE		8%	20%	73%
CA		3%	29%	68%
US		9%	24%	67%
NG		6%	5%	89%
ZA		6%	10%	84%
Global average		7%	20%	73%



# RETURNS: WHY THE WORLD SENDS GOODS BACK

Returns are the hidden cost of e-commerce. And with clothing and footwear still the No.1 online buy, it's not surprising that sizing is the No.1 reason to return. Damaged and poor-quality goods make up the top 3.

## No.1 Wrong fit

Sizing of clothing and footwear is the biggest issue. 23% of respondents said this was why they returned their last purchase.

Ensuring your website includes a highly accurate and easy to understand (in your target market) size guide is likely to help. Also, regular goods sample checks to ensure sizing stays consistent across all SKUs makes sound business sense.

## No.2 Damaged goods

The second key reason for returning goods is damage. 20% of respondents said that this was why they returned their last purchase. In Latin America, it was even higher at 27%.

## No. 3 Poor quality

Poor quality is cited as the third reason for returns – especially among Chinese shoppers, with a figure of 28%.



**Incorrect packaging is one of the main causes of damage to goods traveling cross-border. And poor fit also drives up your returns...**

Two opportunities stand out. **Firstly**, seek the advice of your delivery partner on choosing packaging that will ensure your goods survive their journey.

**Secondly**, ensure you have globally recognized sizing available on your site. Not every country adheres to the same sizing rules so sizing guides for various countries could vastly reduce your returns. Not to brag...but, we also offer returns solutions in many countries. If you're considering expanding into new markets head to page 56 to reach out to one of our international delivery specialists in your country.

Reason for returns

		I didn't need it anymore	It didn't look like the image on the website	It didn't suit me	It was damaged	It was the wrong size	Not applicable	Other	The quality wasn't good
AU		2%	8%	6%	14%	27%	31%	3%	9%
CN		5%	14%	12%	15%	21%	5%	0%	28%
IN		2%	11%	7%	19%	28%	9%	0%	24%
MY		2%	13%	4%	38%	17%	13%	2%	11%
TH		2%	26%	2%	31%	10%	13%	2%	13%
AT		4%	9%	12%	19%	28%	8%	1%	20%
CZ		2%	11%	8%	19%	27%	19%	1%	12%
FR		2%	8%	9%	21%	23%	24%	1%	12%
DE		3%	9%	16%	12%	23%	13%	2%	21%
IT		3%	9%	9%	23%	20%	19%	1%	15%
NL		4%	10%	13%	12%	29%	17%	1%	15%
PL		3%	11%	6%	15%	26%	22%	0%	16%
ES		4%	10%	9%	25%	24%	17%	1%	10%
SE		2%	8%	13%	13%	34%	17%	1%	12%
UK		2%	10%	9%	19%	21%	21%	2%	16%
AR		1%	9%	5%	27%	19%	20%	2%	17%
BR		1%	6%	10%	27%	20%	24%	3%	8%
MA		2%	23%	8%	14%	23%	9%	2%	19%
AE		2%	19%	8%	15%	24%	6%	1%	25%
CA		3%	7%	8%	20%	22%	22%	2%	17%
US		3%	11%	7%	22%	25%	15%	2%	15%
NG		2%	19%	4%	16%	20%	19%	1%	20%
ZA		2%	11%	5%	19%	30%	19%	2%	12%
Global average		3%	12%	8%	20%	23%	17%	1%	16%



## DELIVERY AND RETURNS

# WHAT THE SURVEY RESULTS MEAN FOR YOUR BUSINESS

Delivery and returns services are a key factor in your customers' buying decisions. And the message seems to be 'flexibility'.

Up to 75% of global shoppers want to be able to redirect or change their delivery instructions at the last minute. Is this a service you currently offer? If not, now might be the right time to discuss how to improve your delivery options with the experts at DHL eCommerce.

And if you sell higher-priced goods – especially those that people send as gifts – tracking is a must. Ensure you're working with a delivery provider that offers tracking to and from the recipient's address (not just the purchaser) as standard. Again, DHL eCommerce can help.

How much you charge for delivery and returns is also a deciding factor when it comes to increasing your global sales – especially in Latin America, Africa and the Middle East. Rolling the cost of returns into your general product pricing can help you present returns as free. And you can do the same with delivery – but remember LATAM and SSA want to see what they're being charged for delivery separately.



*"With global shoppers demanding faster and free delivery, there is an opportunity for e-tailers to re-position how they charge shipping and to give their customers more than one delivery choice. At DHL we offer multiple delivery options, which is what shoppers are asking for."*

**Alexander Schmitz-Hübsch**

SVP Marketing and Commercial – DHL eCommerce





# SUSTAINABLE E-COMMERCE OPTIONS

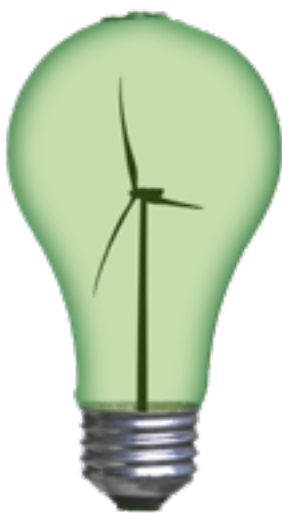
Read on to discover the results in more detail

- ☐ Global cross-border shopping
- ☐ Delivery and returns
- ☒ **Sustainable e-commerce options** (pg 40-43)  
The global growth of greener e-commerce
- ☐ Online shopping landscape
- ☐ Conclusions





# SHOPPING GREENER: THE RISE OF SUSTAINABILITY



Greater awareness of the environmental impact of online shopping has prompted more interest in sustainable e-commerce solutions.

**71%** SAID SUSTAINABILITY IS IMPORTANT TO THEM WHEN THEY BUY ONLINE

**28%** OF SHOPPERS SAID THEY WOULD 'ALWAYS BE WILLING TO PAY MORE' FOR A GREENER DELIVERY OPTION OR MORE SUSTAINABLE PACKAGING – ALTHOUGH MOST WOULD PREFER THE VENDOR TO ABSORB THE COST

But attitudes vary by region.

**44%** of Latin Americans say sustainable e-commerce options are very important

But on average, only **22%** of Europeans say the same

How important is the topic of sustainability to you when shopping online?

		Net importance
AU		51%
CN		78%
IN		92%
MY		78%
TH		87%
AT		59%
CZ		51%
FR		71%
DE		62%
IT		75%
NL		50%
PL		73%
ES		69%
SE		70%
UK		55%
AR		79%
BR		80%
MA		79%
AE		80%
CA		57%
US		62%
NG		96%
ZA		84%
Global average		71%

# WILL CUSTOMERS PAY FOR SUSTAINABLE DELIVERIES?

Shoppers are split on paying more for greener deliveries.

WORLDWIDE  
**44%**  
WOULD 'SOMETIMES' PAY MORE FOR SUSTAINABLE DELIVERY AND PACKAGING

Customers in MENA, APAC and SSA are more willing to put their money where their mouth is when it comes to sustainable shopping than those in Europe or North America.

Would you be prepared to pay more for a green delivery?

		I would always choose to pay more for a green delivery
AU		14%
CN		39%
IN		54%
MY		33%
TH		50%
AT		28%
CZ		16%
FR		23%
DE		26%
IT		19%
NL		16%
PL		13%
ES		24%
SE		22%
UK		16%
AR		24%
BR		26%
MA		45%
AE		41%
CA		16%
US		27%
NG		42%
ZA		28%
Global average		28%




























# ALTERNATIVE WAYS TO SHOP GREENER

Paying more for delivery is only one way to shop greener. There are others.

Generally, customers are prepared to wait longer than pay more or collect from service points. In North America, 61% prefer this option compared to 39% of shoppers in SSA. And shoppers in MENA and North America are far less likely to switch to collection to be sustainable than European shoppers.

## What are you most likely to do to make your online shopping more sustainable?

		Have a longer delivery time	Pay more for your delivery	Switch to collection
AU		47%	23%	30%
CN		45%	29%	27%
IN		51%	37%	12%
MY		42%	39%	19%
TH		48%	37%	15%
AT		56%	23%	21%
CZ		51%	24%	26%
FR		39%	19%	42%
DE		51%	25%	24%
IT		43%	23%	34%
NL		46%	20%	34%
PL		50%	21%	29%
ES		45%	18%	37%
SE		55%	22%	23%
UK		54%	20%	27%
AR		48%	25%	26%
BR		48%	21%	31%
MA		40%	48%	11%
AE		43%	41%	16%
CA		63%	18%	19%
US		58%	29%	12%
NG		38%	47%	15%
ZA		40%	27%	33%
Global average		48%	28%	24%



EXPERT TIP

This is a real selling point for smart e-tailers. DHL eCommerce offers a range of options to cut greenhouse gases for your customers from EVs to carbon-offsetting.

# GIVING CUSTOMERS A SUSTAINABLE PACKAGING OPTION

44%

OF GLOBAL SHOPPERS WOULD SOMETIMES BE PREPARED TO PAY EXTRA FOR MORE SUSTAINABLE PACKAGING

28%

OF SHOPPERS WOULD ALWAYS PAY FOR SUSTAINABLE PACKAGING WITH SSA COUNTRIES THE KEENEST (44%)

28%

OF SHOPPERS WORLDWIDE SAID THEY WOULD 'NEVER PAY' FOR THIS

## Would you be prepared to pay more for a sustainable delivery?

	I would always choose to pay more for sustainable packaging
AU	16%
CN	39%
IN	54%
MY	33%
TH	52%
AT	24%
CZ	17%
FR	24%
DE	23%
IT	19%
NL	13%
PL	14%
ES	21%
SE	20%
UK	14%
AR	24%
BR	31%
MA	37%
AE	42%
CA	15%
US	24%
NG	52%
ZA	36%
Global average	28%



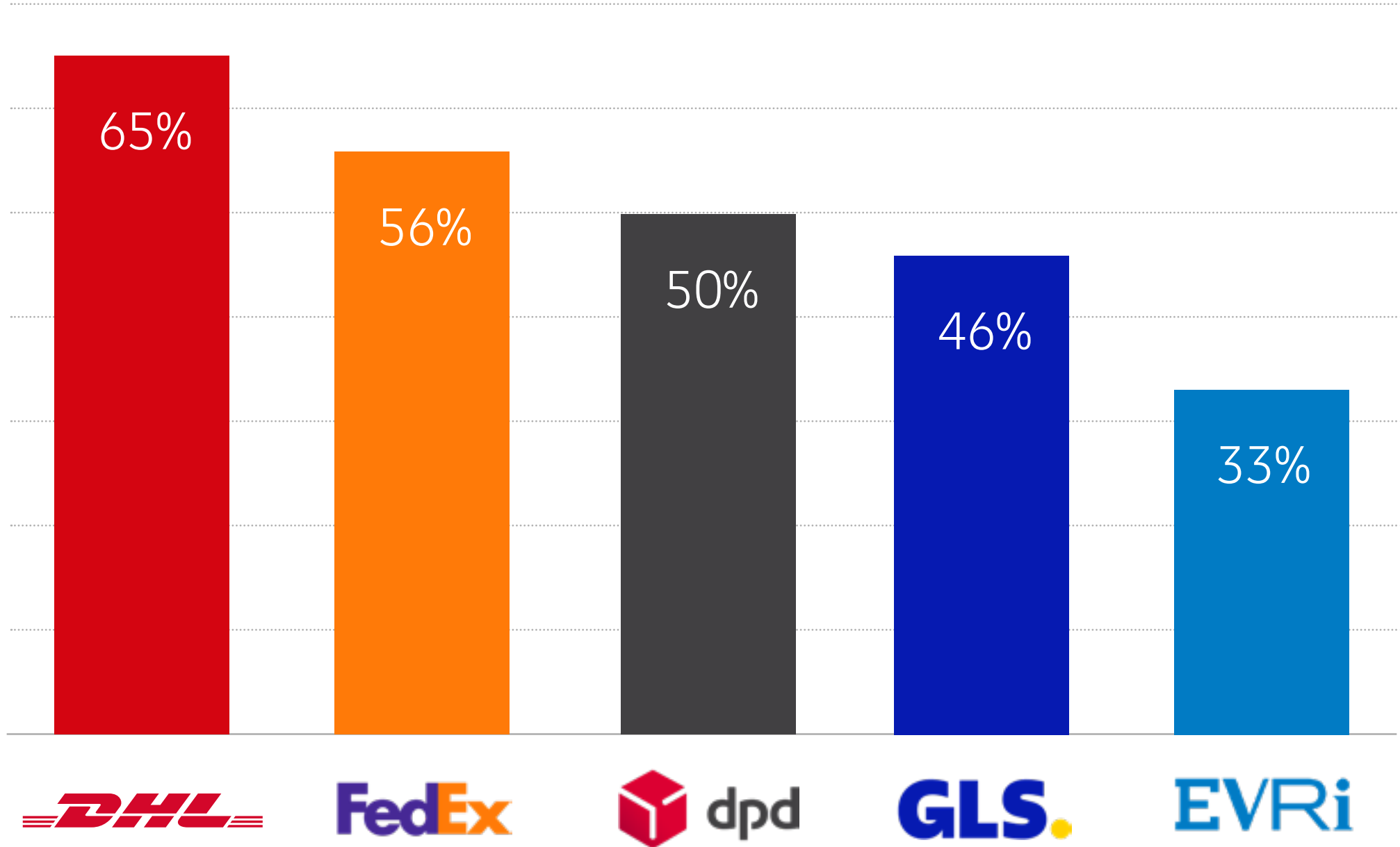
# DHL LEADS THE SUSTAINABILITY CHARGE

Around the planet, DHL is seen as the most sustainable of all the international delivery companies.

65% OF SHOPPERS SAY THEY BELIEVE DHL IS 'QUITE OR VERY SUSTAINABLE'.

If you want to be seen to be green – you know who to talk to!

Which companies do global shoppers trust to deliver sustainably?





## SUSTAINABLE E-COMMERCE OPTIONS

# WHAT THE SURVEY RESULTS MEAN FOR YOUR BUSINESS

Offering a sustainable delivery option is not only important to 7 out of 10 global shoppers, it's also a vital component of your brand integrity. There are a number of options you can offer customers to support the environmental cause...

Collecting deliveries instead of door-drops helps to reduce emissions and this is becoming increasingly popular in regions such as Europe and Latin America.

Another way to give your customers a greener option is to offer a longer transit time that means goods can be collated and shipped in greater volume using more sustainable transport methods.

Other options to show your green credentials are to choose recycled or sustainable packaging – and bundling goods into a single package rather than dispatching multiple packages.

Another way to be more sustainable is to highlight to customers the environmental costs of returns which create more carbon emissions. Sending goods back via access points – like lockers or shops – and providing an incentive to reduce multi-order fashion sizes, are all ways to help the planet.



*“It's great to see that DHL is seen as one of the most sustainable carriers compared to other providers. We consider ourselves to be pioneers in green logistics on a journey to be net zero by 2050. Let us work together in achieving your sustainability goals.”*

**Masa Piter**

Chief of Staff & Sustainability Officer – DHL eCommerce





# ONLINE SHOPPING LANDSCAPE

The background of the slide features a diagonal split. The left side is a solid bright yellow. The right side shows a blurred photograph of several cardboard boxes. Two of the boxes have a black shopping cart icon printed on them. The boxes are stacked, with one in the foreground and others behind it.

Read on to discover the results in more detail

- ☐ Global cross-border shopping
- ☐ Delivery and returns
- ☐ Sustainable e-commerce options
- ☒ **Online shopping landscape** (pg. 45-53)  
How the world shops online today...and tomorrow
- ☐ Conclusions



# WHAT DEVICES DO CUSTOMERS USE TO SHOP?

Smartphones are the ‘tech of choice’ for the majority of the world’s shoppers – led by **Asia Pacific (78%)** and **Sub-Saharan Africa (77%)**.

Traditional technology is still relevant with desktop and laptop computers the preferred choice for 43% of Latin Americans, 42% of Europeans and 41% of North Americans.



























### Who prefers what?

**Czechs lead quite significantly** with a preference to purchasing on a desktop – it’s not surprising then they are the second least likely to purchase on social media in Europe, after the Brits (see page 47).

**China and Thailand clearly lead the way with a preference to mobile-first purchasing.** They also lead the way in purchasing on social media.

UK leads for tablet across all countries. But with such a small percentage of shoppers using this as their primary device, does it warrant the additional development time it might cost you?

What device do you usually use when shopping online?

			
	Laptop/desktop	Smartphone	Tablet
AU 	43%	51%	6%
CN 	10%	87%	3%
IN 	19%	80%	1%
MY 	13%	84%	3%
TH 	11%	87%	2%
AT 	33%	63%	4%
CZ 	65%	31%	4%
FR 	44%	48%	8%
DE 	37%	57%	6%
IT 	36%	59%	5%
NL 	34%	58%	8%
PL 	52%	47%	1%
ES 	41%	54%	4%
SE 	31%	63%	6%
UK 	43%	47%	10%
AR 	48%	51%	1%
BR 	38%	62%	0%
MA 	37%	61%	2%
AE 	27%	70%	3%
CA 	48%	45%	7%
US 	35%	60%	5%
NG 	12%	86%	2%
ZA 	29%	68%	3%
Global average	34%	62%	4%



Increasingly, e-commerce website designers and providers are switching to a mobile-first model. Designing or updating your site with the limitations of mobile first means that developing the desktop version afterwards is easier and more cost effective. However, it’s important to optimize your e-commerce site for your global audiences. If you ship goods to the Czech Republic, then it’s important to offer an excellent desktop experience.





# THE RISE AND RISE OF SOCIAL MEDIA E-COMMERCE

Social media platforms are rapidly becoming the go-to for the start of an e-commerce purchase, with MENA, SSA and Asia Pacific leading the regions.

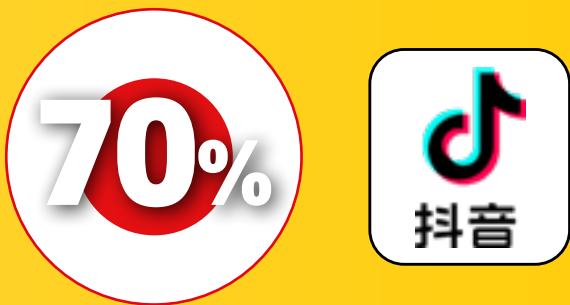


Facebook and Instagram are still the preferred channel of choice overall, but TikTok is growing fast.





























In Malaysia (57%) and Thailand (52%) the numbers of shoppers using TikTok are even greater.











Chinese shoppers tend to favor Douyin with 70% of respondents saying they've used it to make a purchase.



## Have you ever purchased items on the following platforms?

		Facebook	Instagram	Tiktok	Pinterest	Snapchat	YouTube	
								Other
AU		32%	21%	10%	4%	5%	9%	3%
IN		40%	45%	5%	9%	13%	35%	9%
MY		54%	39%	57%	5%	4%	23%	17%
TH		67%	31%	52%	7%	4%	26%	12%
AT		19%	25%	18%	7%	10%	18%	5%
CZ		26%	14%	8%	3%	4%	15%	3%
FR		27%	18%	11%	8%	10%	15%	7%
DE		19%	23%	17%	6%	6%	16%	7%
IT		27%	19%	13%	5%	3%	14%	6%
NL		30%	20%	14%	7%	7%	14%	2%
PL		41%	18%	10%	5%	5%	19%	6%
ES		21%	25%	12%	4%	3%	17%	7%
SE		31%	22%	14%	5%	9%	15%	2%
UK		24%	13%	12%	3%	7%	12%	2%
AR		51%	44%	5%	2%	1%	9%	15%
BR		38%	38%	7%	8%	2%	16%	9%
MA		71%	43%	11%	6%	3%	24%	8%
AE		50%	45%	30%	14%	23%	33%	5%
CA		29%	19%	12%	6%	3%	18%	5%
US		37%	26%	17%	9%	13%	24%	2%
NG		63%	55%	14%	13%	4%	24%	15%
ZA		45%	23%	13%	9%	3%	14%	12%
Global average		38%	28%	16%	7%	6%	19%	7%

		WeChat	Weibo	Douyin	Kuaishou	Bilibili	Little Red Book	Zhihu
				 抖音				
CN		47%	11%	70%	36%	19%	29%	8%

Respondents were offered multiple choice selection for this question.



# SOCIAL MEDIA PLATFORMS USED FOR MAKING PURCHASES

The real power of social media can be seen in its ability to influence buying decisions.

**MENA leads with 46%** of shoppers always using social media both for inspiration and to make their purchases directly on the platform. **APAC follows at 42%.**

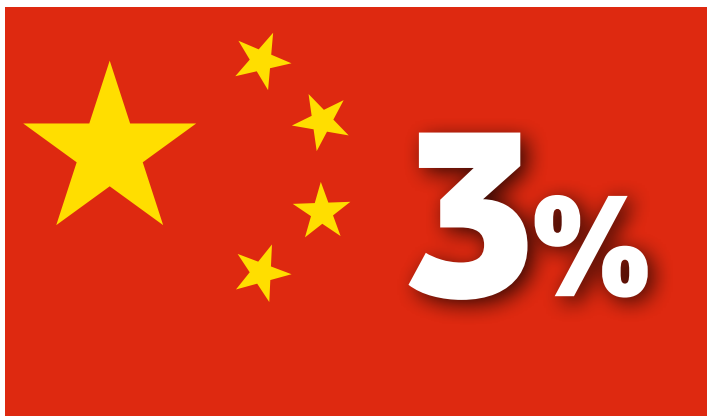
**Only 20% of North American and 18% of European shoppers** use social media for shopping although **40% of European and 39% of North American shoppers** use social media platforms for shopping inspiration.


























Social media inspiration can vary widely within regions.



In Australia, 41% would never use social media for ideas or to make a purchase. But only 3% in China would say the same.



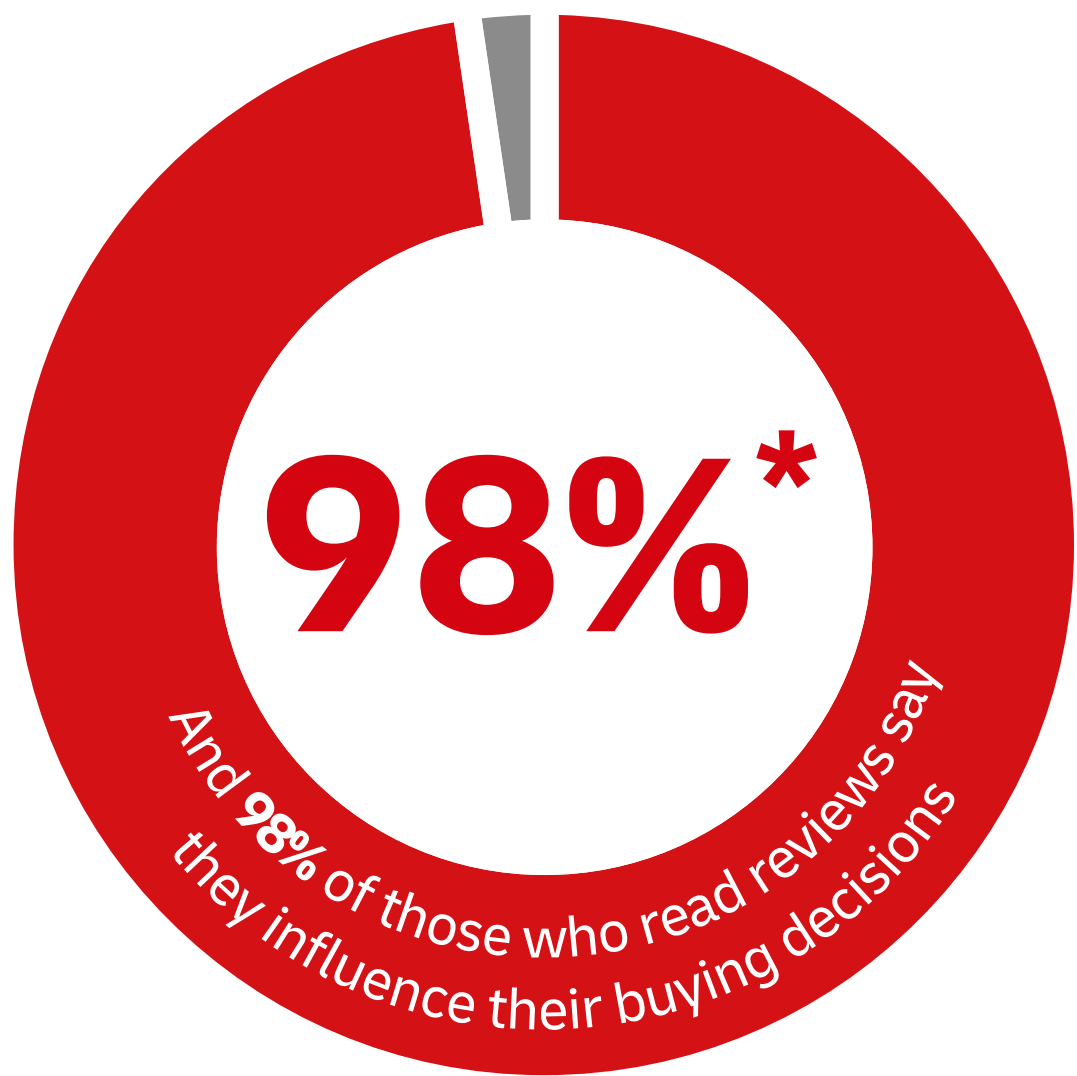
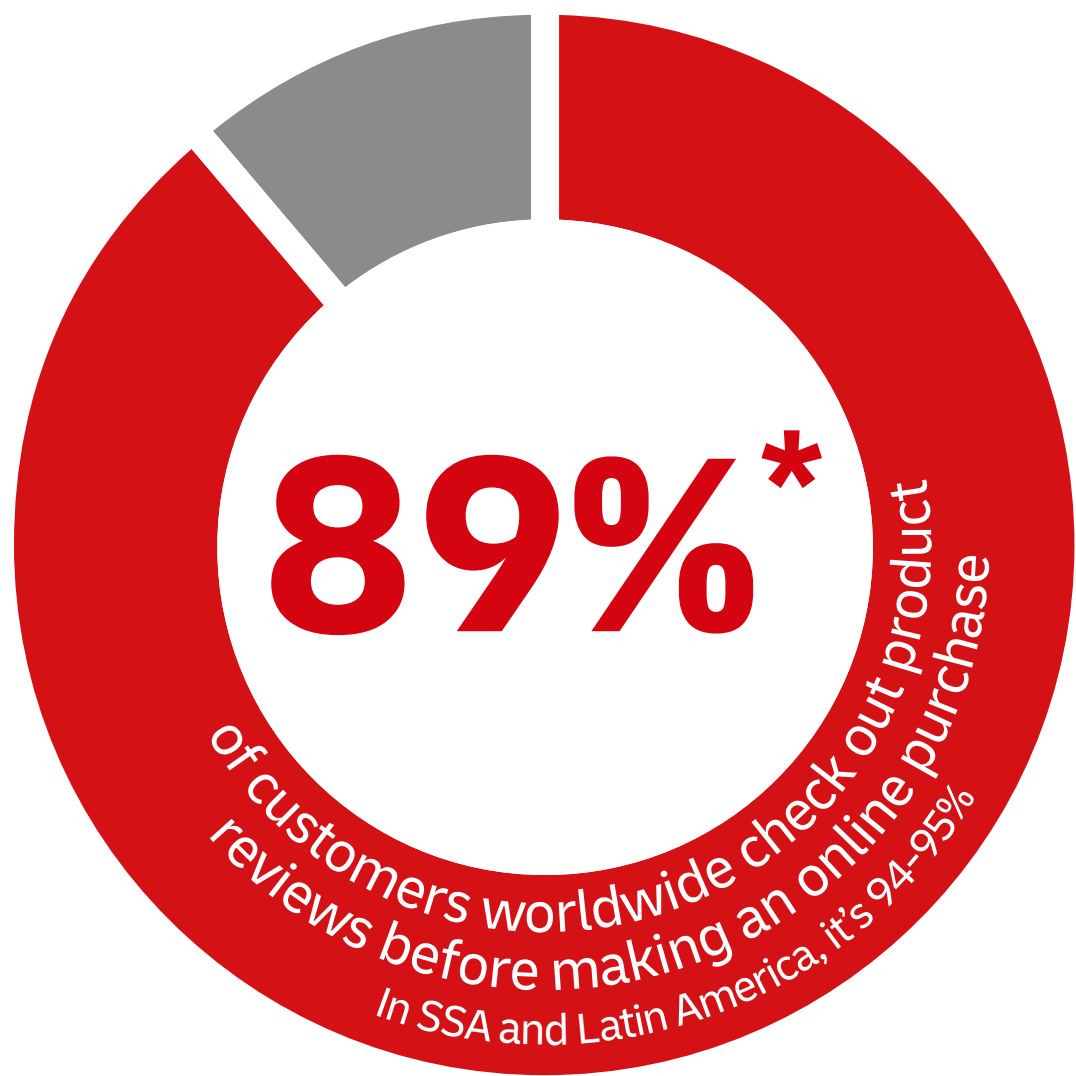
To what extent does social media mark the beginning of your online purchase?

	I always use social media for shopping inspiration and regularly make purchases directly on the platform	I don't use social media for shopping inspiration or to make purchases	I use social media for shopping inspiration but don't often make purchases directly on the platform
AU 	16%	41%	43%
CN 	52%	3%	44%
IN 	39%	23%	38%
MY 	46%	12%	42%
TH 	58%	11%	31%
AT 	21%	37%	41%
CZ 	14%	48%	37%
FR 	17%	50%	33%
DE 	23%	40%	37%
IT 	19%	37%	45%
NL 	17%	44%	39%
PL 	17%	31%	52%
ES 	20%	40%	40%
SE 	18%	40%	42%
UK 	13%	56%	31%
AR 	32%	18%	51%
BR 	22%	27%	51%
MA 	48%	11%	41%
AE 	45%	10%	46%
CA 	15%	44%	41%
US 	24%	39%	38%
NG 	46%	8%	46%
ZA 	21%	23%	55%
Global average	28%	30%	42%



# THE HIDDEN VALUE OF CUSTOMER REVIEWS

Customer reviews help shoppers make the right choices. They're also an important asset for e-commerce businesses, helping to reduce returns by managing your customers' expectations.



We're rapidly becoming a world of savvy, site-smart online shoppers. So, providing a space for purchasers to leave honest reviews – that highlight the benefits and limitations of a product – will not only promote sales, it could also reduce your returns!

\*Data tables not shown here.


























## To what extent are you influenced by reviews?

		Not at all	To some extent	To a great extent
AU		4%	73%	23%
CN		1%	56%	43%
IN		2%	45%	54%
MY		1%	52%	47%
TH		1%	42%	57%
AT		3%	62%	35%
CZ		2%	65%	33%
FR		5%	70%	25%
DE		2%	71%	26%
IT		3%	66%	31%
NL		5%	72%	23%
PL		1%	59%	41%
ES		3%	59%	38%
SE		2%	67%	32%
UK		6%	72%	22%
AR		2%	43%	55%
BR		2%	24%	74%
MA		2%	49%	49%
AE		2%	47%	51%
CA		2%	63%	35%
US		4%	55%	41%
NG		1%	41%	59%
ZA		2%	42%	56%
Global average		2%	56%	42%



# SUBSCRIPTION SERVICES KEEP GROWING

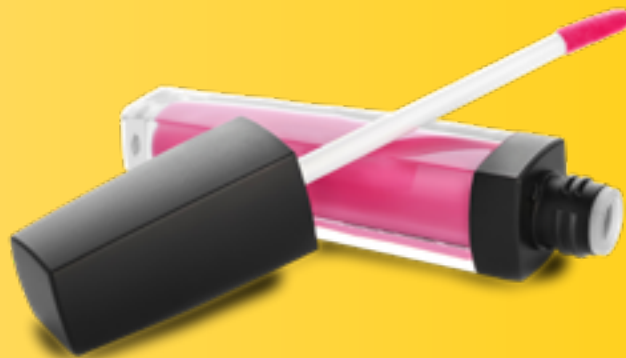
## Who has an online subscription?

AU		21%
CN		51%
IN		54%
MY		43%
TH		59%
AT		37%
CZ		41%
FR		31%
DE		30%
IT		32%
NL		26%
PL		22%
ES		37%
SE		28%
UK		25%
AR		28%
BR		31%
MA		27%
UE		58%
CA		32%
US		43%
NG		42%
ZA		32%
Global average		36%

36% of shoppers around the world said they now have an online subscription service.

THE STRONGEST TAKE-UP IS IN **APAC** WITH

46% AND MENA WITH 43%

































Beauty products are the most popular choice of subscription at **46% (although this rockets to 54% in APAC)** and **food deliveries on 44% run a close second.**

Surprisingly, over a quarter of our online subscribers bought their pet's food this way.



## The most popular subscription product categories around the world

								
		Food	Beauty products	Shaving products	Pet food	Health supplements	Household products	Clothing
AU		32%	45%	17%	24%	32%	26%	25%
CN		71%	45%	42%	30%	34%	51%	52%
IN		64%	60%	43%	23%	46%	52%	60%
MY		50%	60%	26%	14%	36%	44%	39%
TH		50%	54%	21%	15%	44%	40%	49%
AT		29%	42%	25%	26%	16%	23%	23%
CZ		21%	32%	25%	42%	37%	42%	48%
FR		39%	49%	23%	36%	18%	25%	30%
DE		38%	39%	35%	27%	19%	21%	27%
IT		29%	43%	25%	28%	22%	33%	31%
NL		27%	45%	28%	25%	28%	31%	33%
PL		23%	37%	29%	36%	29%	28%	37%
ES		33%	35%	18%	26%	24%	30%	32%
SE		41%	31%	32%	25%	27%	19%	26%
UK		44%	39%	32%	36%	32%	25%	20%
AR		44%	45%	12%	17%	27%	47%	54%
BR		39%	52%	27%	30%	36%	34%	43%
MA		45%	38%	28%	15%	36%	24%	36%
AE		56%	51%	33%	33%	45%	33%	30%
CA		40%	44%	23%	27%	25%	28%	27%
US		54%	45%	30%	39%	40%	34%	27%
NG		42%	50%	31%	10%	40%	36%	55%
ZA		50%	58%	30%	13%	45%	42%	54%
Global average		44%	46%	28%	26%	34%	35%	39%

Respondents were offered multiple choice selection for this question.



# MEET YOU AT THE MARKETPLACE

## The world’s favorite marketplaces\*

Over the last two decades, online **marketplaces have grown fast and by 2027 will consume around 60% of global online sales.**

Every region has its own, individual Marketplace preference. Amazon features everywhere except Latin America and SSA, but sites such as Shopee, Mercado Libre and Jumia have strong local followings.

Beyond the obvious factors of price and availability, there are some important ‘unseen’ qualities marketplace customers appreciate.

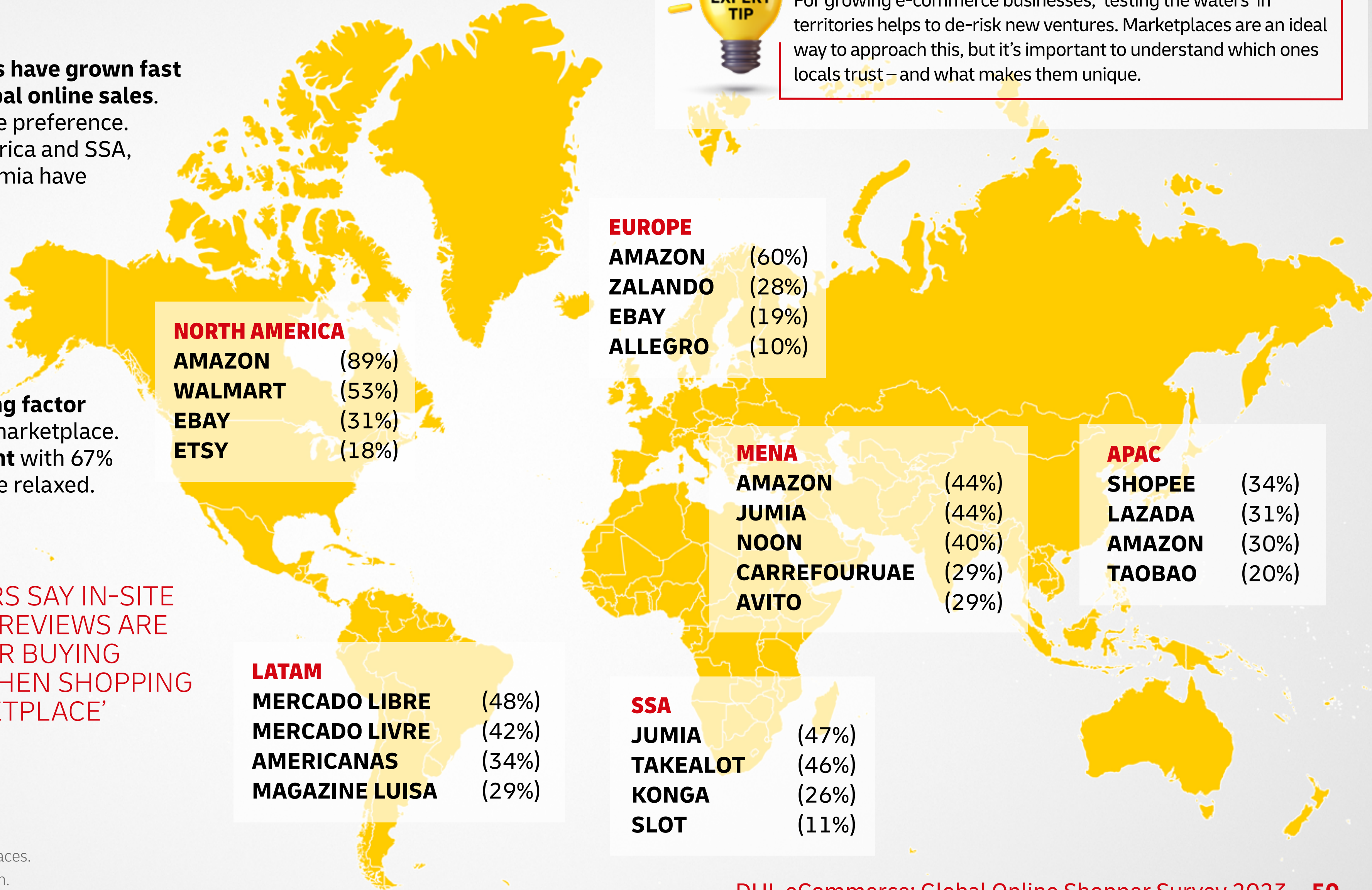
## Marketplace sellers, take note!

In all regions, **the delivery provider is a deciding factor when deciding which seller to buy from** on a marketplace. On average, **75% of shoppers say it is important** with 67% of North Americans and 68% of Europeans more relaxed.

**85%** OF SHOPPERS SAY IN-SITE ‘CUSTOMER REVIEWS ARE KEY TO THEIR BUYING DECISION WHEN SHOPPING ON A MARKETPLACE’



For growing e-commerce businesses, ‘testing the waters’ in territories helps to de-risk new ventures. Marketplaces are an ideal way to approach this, but it’s important to understand which ones locals trust – and what makes them unique.



% of respondents in each region who use the most popular marketplaces.

\*Respondents were offered multiple choice selection for this question.



# HOW GLOBAL SHOPPERS WANT TO PAY

The vast majority of shoppers say websites offer a good range of payment options.



43%

At 43%, credit and debit cards are the most popular ways to pay worldwide.



24%

Digital wallets are also attractive with 24% globally using them – and 31% in APAC countries.

Paying cash on delivery is still expected in many parts of the world – **32% of customers in the MENA region and 22% in the Czech Republic** continue to pay this way.



Buy now, pay later is becoming a popular way to purchase in Europe. 8% of customers prefer this option with Sweden, The Netherlands, Germany and Austria most likely spread the cost. Have you considered adding a BNPL option to your e-commerce website?

## How do you prefer to pay when you shop online?

		Bank transfer	BNPL (Buy now, pay later)	Cash on delivery	Credit/debit card	Digital wallet (Paypal)	Invoice
AU		1%	12%	3%	47%	34%	1%
CN		10%	13%	12%	24%	35%	1%
IN		4%	2%	28%	28%	36%	1%
MY		22%	2%	11%	34%	28%	2%
TH		16%	1%	51%	12%	19%	0%
AT		11%	13%	7%	24%	16%	28%
CZ		13%	2%	22%	46%	14%	2%
FR		4%	5%	7%	58%	24%	2%
DE		10%	12%	4%	11%	39%	25%
IT		2%	1%	15%	42%	36%	2%
NL		14%	17%	5%	30%	24%	7%
PL		33%	5%	14%	25%	22%	1%
ES		1%	5%	7%	50%	33%	3%
SE		6%	18%	3%	34%	18%	20%
UK		2%	6%	5%	62%	24%	1%
AR		9%	1%	3%	69%	17%	2%
BR		7%	0%	1%	71%	13%	4%
MA		8%	1%	42%	26%	21%	2%
AE		2%	2%	22%	46%	24%	4%
CA		1%	1%	6%	69%	20%	1%
US		1%	2%	7%	65%	22%	2%
NG		12%	1%	14%	65%	8%	0%
ZA		9%	2%	13%	56%	18%	1%
Global average		9%	5%	13%	43%	24%	5%



# WHY DO SHOPPERS ABANDON THEIR CARTS?

**Possibly, the greatest frustration for e-tailers is cart abandonment.** So, why do shoppers pull out of a purchase at the last moment? And what can e-commerce vendors do to change their mind? Across the planet, 45% of respondents said they ‘quite’ or ‘very often’ ditch their basket at check-out. On the positive side, 55% of global shoppers said they ‘never’ or ‘very seldom’ abandon their shopping cart.

Customers in MENA and North America are the most likely to abandon their shop, whilst those in LATAM are the least likely.



AND THE **No.1** REASON FOR BAILING OUT AT CHECKOUT?

## EXPENSIVE DELIVERY CHARGES

Top three reasons shoppers abandon their buy...

**53%** DELIVERY IS TOO EXPENSIVE

**29%** DELIVERY TOO SLOW

**26%** SITE WON'T TAKE MY PREFERRED PAYMENT METHOD



Stopping customers from abandoning their cart is largely a matter of perception. When delivery charges are presented at check out, they can be perceived as an additional expense. When delivery charges are rolled into the price of the goods, delivery is seen as free. This offers the buyer a much more positive experience – and encourages them to click the ‘Buy Now’ button.

		Purchased the item on the same site at a later date	Purchased the item with a different online retailer	Was just browsing so didn't do anything	Went into a physical store to purchase
AU		11%	38%	39%	12%
CN		34%	43%	17%	6%
IN		41%	42%	11%	7%
MY		38%	36%	21%	5%
TH		31%	39%	26%	4%
AT		19%	43%	29%	10%
CZ		12%	56%	28%	4%
FR		18%	42%	26%	14%
DE		24%	48%	22%	5%
IT		22%	40%	28%	9%
NL		17%	38%	37%	7%
PL		15%	46%	34%	5%
ES		19%	41%	31%	9%
SE		17%	42%	35%	6%
UK		14%	45%	37%	4%
AR		18%	39%	34%	10%
BR		24%	54%	18%	4%
MA		28%	43%	15%	14%
AE		31%	50%	13%	6%
CA		15%	36%	39%	10%
US		23%	35%	32%	9%
NG		33%	42%	11%	15%
ZA		25%	37%	21%	17%
Global average		23%	42%	26%	8%

On average, **26% of respondents simply gave up** on the idea of buying the goods at all because they had only been browsing – 36% of North Americans and 37% of Brits said this.

HOWEVER  
**42%**  
OF RESPONDENTS SAID THEY WENT ON TO BUY FROM ANOTHER SITE – ONE THAT PROVIDED THE DELIVERY OPTIONS AND PAYMENT METHODS THEY WANTED

With delivery issues the top two reasons for cart abandonment, it makes sense to team with a delivery provider that can offer cost effective and fast solutions for the market you want to reach.



## ONLINE SHOPPING LANDSCAPE

# WHAT THE SURVEY RESULTS MEAN FOR YOUR BUSINESS

Three key trends stand out when we look at the survey results for the global e-commerce landscape.

The first is that cart abandonment and delivery charges are very closely linked. Having made the decision to purchase a product, more than 1 in 2 shoppers have bailed out because the cost of cross-border delivery was too expensive. And 4 in 10 of those went on to buy the product from another site! So, the question is – are you getting the right deal for your international deliveries? Maybe it's time to talk to DHL eCommerce...

Secondly, social media shopping is expanding fast. A recent [Statista report](#) put the growth of year-on-year social commerce revenue at over 31% until the end of the decade. If you're not already selling products via social media platforms, it's a good time to start.

And finally, subscription sales are continuing to grow – with Asia Pacific and China the stand-out markets. As other regions of the world catch up, this could be a key opportunity for your e-store. There are lots of models for making subscription services pay – and one could be right for you.



*“Sales aren’t just made on websites anymore, they are made on social channels and in marketplaces. Today’s e-tailers should consider the buyer journey across multiple touchpoints and consider how to position delivery and customs charges to increase basket conversions.”*

**Ryan Hunter**

Senior Vice-President, Sales Global – DHL eCommerce





# CONCLUSIONS

- ☐ Global cross-border shopping
- ☐ Delivery and returns
- ☐ Sustainable e-commerce options
- ☐ Online shopping landscape
- ☒ **Conclusions**



# CONCLUSIONS: WHAT OUR SURVEY SAID...

Shoppers across the world have different habits and preferences and we hope you've found some useful insights in this Global Online Shopper Survey 2023. Here, we've pulled out six key takeaways we discovered – one for each region.

**Remember when entering into new markets, DHL eCommerce operates across the globe.**

**Click below to request a call back from international delivery specialists in your country.**

[USA](#)  
[Canada](#)  
[India](#)  
[Thailand](#)  
[Malaysia](#)  
[Australia](#)  
[Europe](#)



## Your key takeaways for every region...

### **NORTH AMERICA**

#### **Cross-border opportunities abound**

On the whole, North American shoppers are yet to buy into the cross-border e-commerce opportunity. Right product, right quality, right price could deliver a vast market. And don't forget to explore the opportunities that marketplaces offer in the US and Canada – one way to make cross-border shopping appear local.

### **LATAM**

#### **Cut the surcharges. Win the sales.**

Customs charges and high delivery costs are an instant turn-off for Latin American shoppers when shopping cross-border. Find a way to reduce these and you have a captive audience. And offer a sustainable delivery option. Latin Americans are keen to be green!

### **EUROPE**

#### **Every nation has its own expectations**

Although there are over 40 individual countries in Europe, many sharing a single currency, each has its own shopping preferences. What works in one nation may not in another. Research is key. [Read the European Online Shopper Survey 2023 for greater detail.](#)

### **MENA**

#### **Delivery providers matter in MENA**

These shoppers care about who is bringing their goods. Get the right delivery partner on board is 'Step One' to success.

### **SSA**

#### **Slow deliveries will lose you customers**

Delivering faster than your competitors to SSA shoppers will give you a strong competitive advantage in this region. Find a delivery partner who can handle the challenge.

### **APAC**

#### **Make your site mobile friendly**

Via smartphone is how 78% of your customers in APAC buy. The most switched on of all our shoppers, they want clear, easy to browse, mobile-friendly sites.



# NEXT STEPS

**We hope you've found our Global Online Shopper Survey 2023 useful.**

To learn more about individual countries – and their shopping habits, download DHL's individual country one-pagers [here](#).

And if you're looking to target specific markets in Europe, why not download our brand new [2023 European Online Shopper Survey here](#).

If that's not enough...discover how companies like ASOS, Camper and Mepal are using [Parcel Connect to reach markets across Europe right now](#).

DHL eCommerce operates across the globe. Click below to request a callback from international delivery specialists in your country.

[USA](#)

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