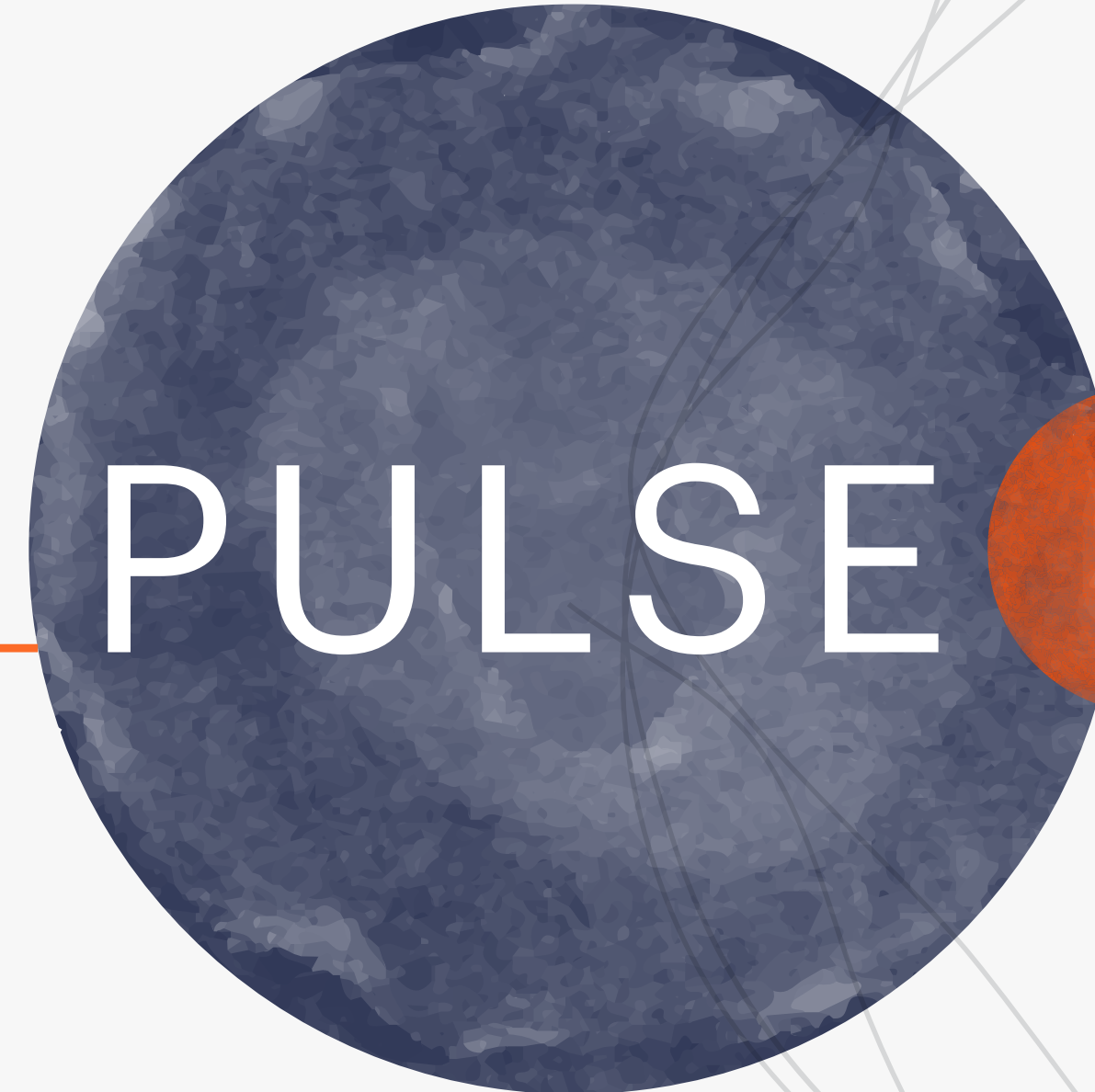


Ecommerce After COVID-19

THE GLOBAL PULSE

Your guide to how COVID-19 has impacted ecommerce and consumer behaviors around the world.



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The COVID-19 pandemic has had a massive and lasting impact on the world, and on ecommerce. As we navigated through the last year of quarantining, mask-wearing, and social distancing, there were a number of old routines that required us to adapt to “new normals.”

Shopping both in-store and online is one routine that has changed dramatically — and likely permanently — as a result of the global pandemic.

However, it’s not just consumers that have been impacted by these changes. Retailers and businesses have had to be quick to act, innovating new ways to serve their customers. Whether adapting an in-store to online or implementing new processes to accommodate reduced contact pickup, businesses around the world have been directly influenced by the shift in consumer behavior and expectations as a direct result of COVID-19.

Establishing a global pulse on how consumers plan to shop in a post-pandemic world, and understanding the decision-making that goes into ordering a product online, can help retailers and businesses adapt their strategy for success.

This research study, consisting of four separate surveys conducted in April of 2021 in the United States, Canada, United Kingdom, and Australia, reveals that an average of **39% of consumers** say they have spent more on retail in

2020 than they did in 2019. This is up 3% from our initial research done in May 2020 on the corona virus and its effect on ecommerce in the U.S. and UK.

And as digital adoption continues, with the world gaining more widespread access to the internet, cross-border ecommerce has become the norm for many retailers looking to scale their operations. Between 2019 and 2020, the global market saw double-digit growth [jumping nearly 28%](#), from 3.35 billion to just over 4.28 billion.

In this guide, we’ll dissect COVID-19’s long-term impact on consumer behavior to better understand what is expected of your retail and/or ecommerce business moving forward. Research will cover data around:

- **Post-Pandemic Consumer Behavior**
- **Continued Shipping & Delivery Challenges**
- **Trending Consumer Expectations**

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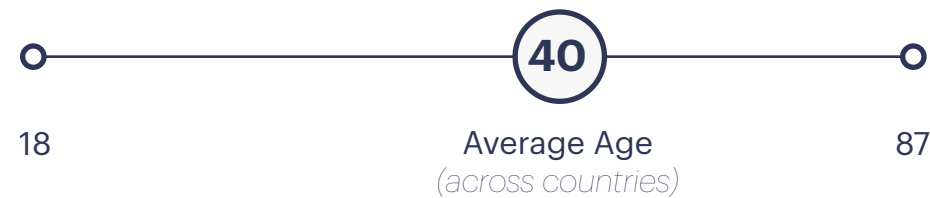
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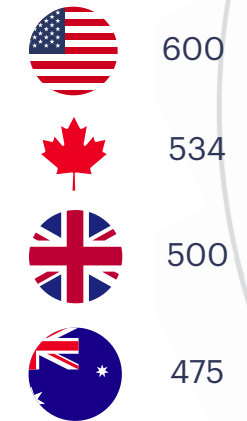
Sample size

This study was commissioned by ShipStation at the end of April 2021 and completed at a 95% confidence level with a +/-4% margin of error. Survey responses were collected from more than 2,000 qualified consumers in the U.S., UK, Canada, and Australia who shop online.

All respondents were between the ages of 18 and 87 and data was collected through an online survey consisting of 87 questions and statements.



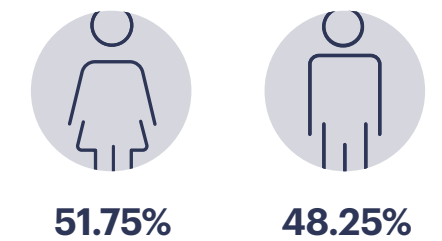
Respondents:



Qualifiers:

- ✓ Must shop online
- ✓ Live and work in U.S., Canada, UK, or Australia

Demographics: (AVG.)



Additional research on the effects of COVID-19 on ecommerce

This is the third research study conducted by ShipStation since March 2020 to measure the full impact of COVID-19 on ecommerce and the ever-changing expectations around shopping, shipping, and delivery. This guide utilizes data from all three research studies in order to provide a more comprehensive view of how the pandemic has and will continue to affect consumers and retailers around the world. Our previous COVID-19 research guides include:

- **Coronavirus: Its Impact on Ecommerce**
- **Ecommerce Beyond COVID-19**

Key Term Glossary

Terminology ranges from country to country. In order to help you better understand the data collected for consumers around the globe, reference this quick translation guide for ecommerce industry terms in the United States, Canada, United Kingdom, and Australia.

UNITED STATES	CANADA	UNITED KINGDOM	AUSTRALIA
<p>Omnichannel fulfillment model in which shoppers purchase online and collect their orders from a nearby physical location.</p>			
Curbside Pickup	Curbside Pickup	Click and Collect	Click and Collect
<p>Omnichannel retail strategy that allows customers to enjoy the convenience of purchasing their order online, while still picking it up in person from the retail store.</p>			
Buy Online Pick Up In Store (BOPIS)	Buy Online Pick Up In Store (BOPIS)	Click and Collect	Click and Collect
<p>Term used to describe the fulfillment process for ecommerce orders</p>			
Shipping	Shipping	Delivery	Delivery

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Key Insights

This research guide breaks down consumer behavior and shipping trends by country. However, there are some trends that span across cultures, languages, and buyers. Here are four key insights we've concluded from averaged data pulled across all surveyed countries. For detailed information from each individual survey, please reference the country-specific sections.

1

Small Business Spending is Trending Upward

While the pandemic hit small businesses hard, it is reassuring to know that the **majority of consumers have stepped up to shop small in an effort to bolster their local economy** and the small business dreams of many. During COVID-19, consumers were willing to pay more for products and shipping in order to show support.

2

Visibility Into Shipping & Delivery is Key

Nothing makes a customer happier than knowing exactly how long to expect a package to arrive, and the ability to track its progress along the way. This pre-dates the pandemic, however **COVID-19 seems to have heightened consumers' expectation for visibility into their shipping and delivery**. Retailers will want to optimize their checkout experience to include clear delivery windows and transparency on shipping rates moving forward.

3

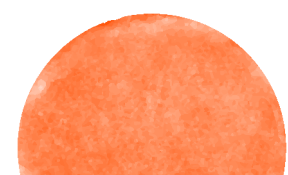
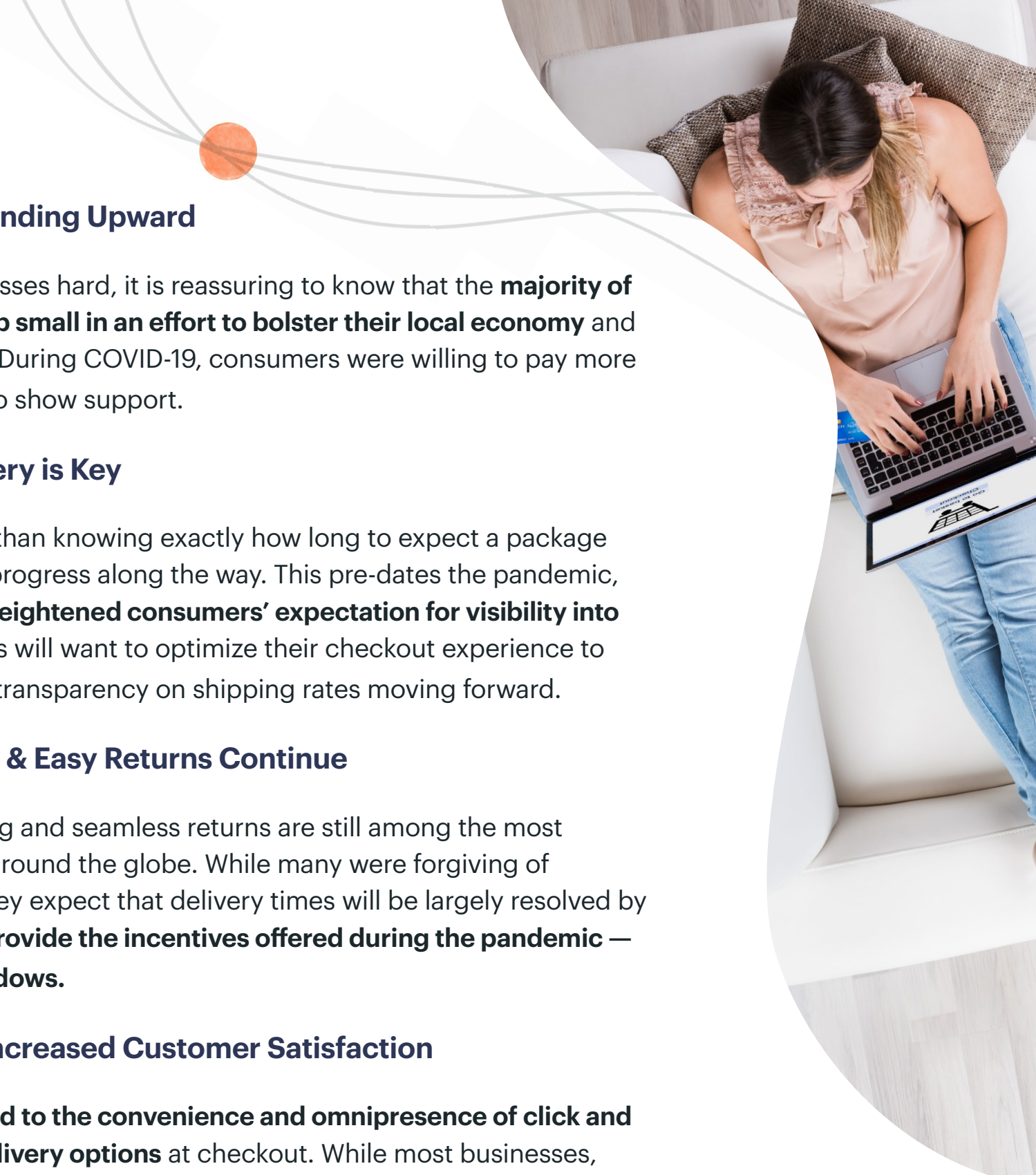
Expectations for Free Shipping & Easy Returns Continue

It comes as no surprise, free shipping and seamless returns are still among the most popular demands from consumers around the globe. While many were forgiving of shipping delays due to COVID-19, they expect that delivery times will be largely resolved by now and that retailers **continue to provide the incentives offered during the pandemic — free shipping and larger return windows**.

4

Increased Delivery Options = Increased Customer Satisfaction

Consumers have grown accustomed to the convenience and omnipresence of click and collect, curbside, and increased delivery options at checkout. While most businesses, particularly non-big-box retailers, added these services into their processes in an effort to keep business going and consumers safe, it has become an expected part of the ecommerce experience. In order to keep customers happy, retailers should find ways to incorporate these options as standard practice.



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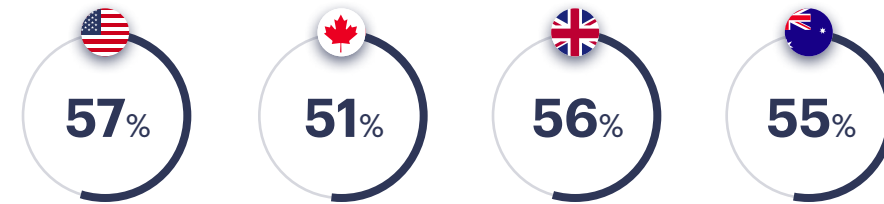
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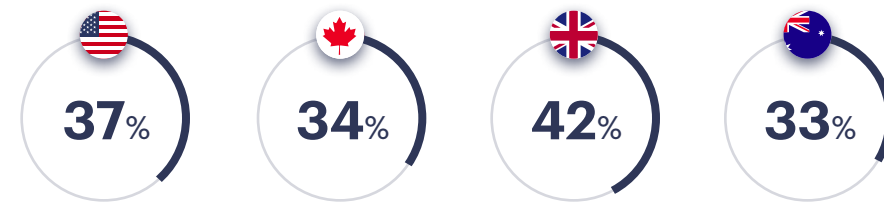
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feel more financially stable than they did a year ago



expect to spend more in 2021 than they did in 2020



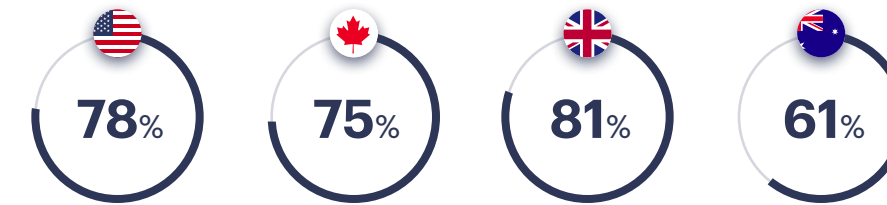
willing to pay slightly higher prices for a product in order to support a small business



have started shopping in stores again



despite this, the majority still say that they will prefer to shop online instead of in stores, even after the COVID-19 pandemic is over



say that quarantine pushed them to buy items online that they would typically only purchase in-store before the pandemic

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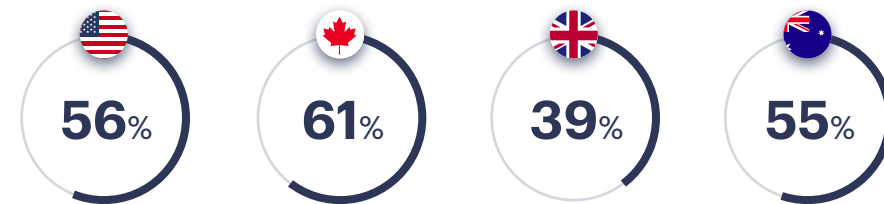
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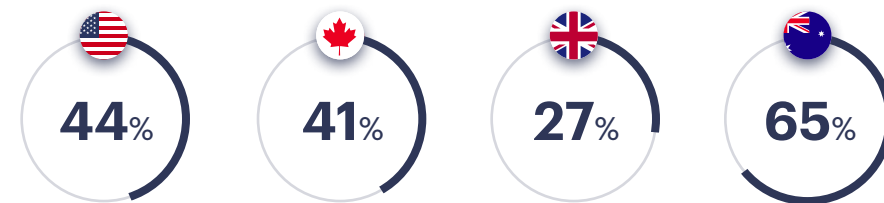
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say that buying online offers a better experience now than it did one year ago



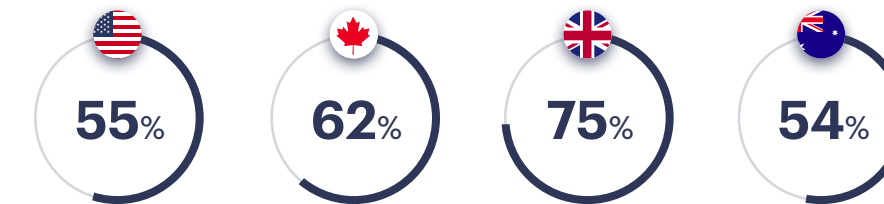
expect retailers to offer free shipping indefinitely after COVID-19



are less likely to shop with retailers not offering curbside or pickup options after COVID-19



say that COVID has not made them any more willing to pay for shipping in exchange for faster shipping times



however, majority say they're willing to pay for shipping in order to support a small, local and/or independent retailer



want full visibility into expected shipping timelines before making any online purchase



UNITED STATES

After nearly a full year of quarantine and month-long toilet paper shortages, consumers in the United States are not new to the changes in ecommerce, shipping, and logistics. Let's explore how COVID-19 has impacted their behaviors and expectations over time.



Consumer Spending During COVID-19

Despite the pandemic, consumer **retail spending in the United States was strong** throughout 2020 and is expected to continue into 2021.

37%
of American consumers report that they spent *more* in 2020 than they did in 2019

37%
spent roughly the *same* in 2020 as they had in 2019

37%
expect to spend *more* in 2021 than they did in 2020

ONLY
26%

reported spending less in 2020 than they did in 2019

ONLY
12%

anticipate spending less in 2021 than they did in 2020

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Spending went even beyond just acquiring necessities, with the majority of those surveyed saying they sought out **small businesses** in an effort to help support them through these difficult times. **7 in 10** even say they would be willing to pay slightly higher prices for a product in order to support a small business.

78%

say they've chosen to shop with small, local, and/or independent retailers to help support their local economy during the pandemic (**up from 69%** in May 2020)

54%

say they have discovered a new small ecommerce retailer via social media in the last year

The ability and desire to spend more in order to support small businesses could be, in part, because of the stimulus checks or the fact that we've started to resume some normalcy in terms of the U.S. economy and our lifestyles. But, either way, Americans report feeling more financially sound and have less hesitancy around spending.

57%

American consumers report that they feel more financially stable than they did a year ago almost—and more comfortable spending money

43%

agree that they are spending more in anticipation of going more places and participating in more activities as the pandemic ebbs

But, the ways in which Americans spend may be permanently altered.

MAR 2020

83%

of American consumers, when asked at the onset of the pandemic in March 2020, said that they planned to resume their in-store shopping habits as soon as the outbreak had passed

NOW

74%

say that they will prefer to shop online instead of in stores, even after the COVID-19 pandemic is over

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Consumers are not shy about hoarding goods during a crisis. Similar to when a natural disaster strikes, COVID-19 sent consumers into a panic causing them to buy more than the supply could handle. This caused a ripple effect felt throughout the supply chain, and American consumers are still suffering from some of the anxiety felt by running out of necessary supplies with no ability to restock. While the supply chain has mostly recovered at this point, buying in bulk may be a lasting generational hallmark from the pandemic.



71%

of American consumers say that they were buying in bulk and/or buying increased volume of product due to accessibility concerns when asked at the pandemic's onset in March 2020 (up from 70% in May 2020)

56%

reported that they are still doing this a year later, even though supply chains have mostly caught up

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Online Shopping Across Retail Verticals

Due to the closure of many stores and growing safety concerns during the pandemic, consumers were forced to get comfortable buying a wide variety of products online. This not only expanded the global ecommerce market, but it contributed to a widespread adoption of the online buying process.

78%

say that quarantine pushed them to buy items online that they would typically only purchase in-store before the pandemic

77%

say they are shopping online more as a result of the COVID-19 pandemic (**up from 55%** in May 2020)

74%

say they will likely continue to do most of their shopping online long-term

83%

agreed that buying online is easier than it was one year ago

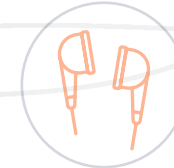
78%

say buying online offers a **better experience** now than it did one year ago

Products consumers preferred to buy online:

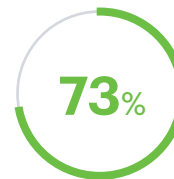
PREFERRED BEFORE COVID-19

ELECTRONICS & TOYS

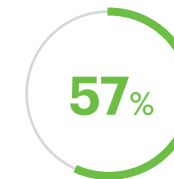


PREFERRED AFTER COVID-19

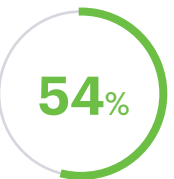
APPAREL & FASHION



HOME DECOR



BEAUTY/ PERSONAL CARE PRODUCTS



Products consumers still prefer to buy in-store:

GROCERIES & FURNITURE



Delivery & Pick Up Options

Retailers are to thank for this improved customer experience. While delivery and pickup options were available prior to 2020, the pandemic catapulted many businesses into innovating ways to create better, safer shopping experiences for their customers. Here are 3 ways U.S. retailers stepped up to the plate in 2020:

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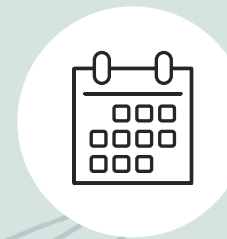
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Offering Free Shipping

67% agreed that they expected retailers to offer free shipping during COVID-19 to counterbalance slower shipping times



Extending Returns Windows

87% expected retailers to offer extended return windows due to potential shipping delays



Implementing Reduced and No-Contact Pickup and Delivery Options

69% of consumers have taken advantage of curbside (up from **49%** in May 2020)

57% of consumers have used buy online, pick up in store

Delivery & Pick Up Options

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While these offerings were previously appreciated and not expected, consumers have enjoyed the added conveniences so much over the last year that they now expect these as standard practice going forward.

62%

expect retailers to offer **curbside** indefinitely
(down 2% since May 2020)

71%

expect retailers to offer **buy online, pick up in store** indefinitely

56%

expect retailers to offer **free shipping** indefinitely

54%

expect retailers to offer **free returns** indefinitely
(up from 44% since May 2020)

56%

expect retailers to offer **extended return windows** indefinitely

Hooked on the convenience of not having to spend hours shopping in-store, many respondents claim that a retailer's curbside and BOPIS offerings will heavily influence their decision on whether to make a purchase.

43%

say they're less likely to shop with retailers not offering curbside

44%

say they're less likely to shop with retailers not offering buy online, pick up in store

While this is barely the majority, it is enough to encourage even the smallest retailers to **consider offering contactless pickup** options in their checkout process.

Shipping Logistics & Delays

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While these offerings were previously appreciated and not expected, consumers have enjoyed the added conveniences so much over the last year that they now expect these as standard practice going forward.

78%

were forgiving of slower shipping times in 2020

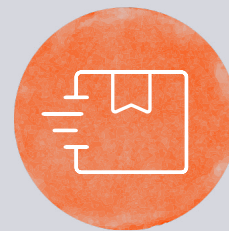
73%

agree that COVID-19 made them lower or reset expectations around delivery speed

78%

now expect retailers to have figured out a way to offer the same shipping speeds as they did before COVID-19

This aligns with the **30% of consumers** who said in May 2020 that they expect retailers to offer faster delivery time after the pandemic is over.



In addition to delivery speed, COVID-19 has had a strong impact on what consumers are looking for when it comes to what a seamless delivery looks like. In May 2020, **94% of consumers** said they expected retailers to have information on their website about how COVID-19 has impacted their shipping process. The shift in priority now places more value on shipping options at checkout and improved visibility into the cost and timelines associated with shipping.

77%

say they care more about real-time visibility into their shipping status

90%

want the ability to see and select shipping rates and speed during the checkout process

87%

want full visibility into expected shipping timelines before making the purchase

Shipping Logistics & Delays



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While the majority say they expect free shipping, sometimes it's just not financially feasible. If retailers are unable to meet the demands for free shipping, maintaining visibility into their shipping timelines and estimates becomes even more imperative. Because, when you have to pay for it you expect more out of it.

93%

expect full transparency into shipping timelines and costs

51%

say that COVID has not made them any more willing to pay for shipping in exchange for faster delivery



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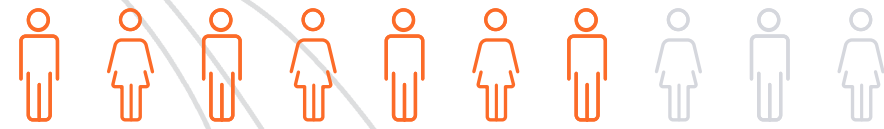
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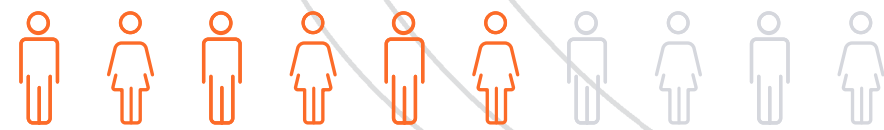
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In-Store vs Online

While many consumers are still avoiding stores due to concerns surrounding the virus, as more people get vaccinated the level of comfortability going into stores grows.



7 in 10 prefer to shop online in order to avoid germs in stores (This is **up 35%** since March 2020)



6 in 10 less likely to shop in stores due to concerns about COVID-19 (This is **up 40%** since March 2020)



69% have started shopping in stores again

68% feel ready to shop in stores again

RESPONDENTS SURVEYED →



FEMALE
50%



MALE
50%

AGE (AVG.)
43



Representation across 49 of 50 states (excluding VT) - live and work in U.S.



CANADA

With a swift government-ordered shutdown in the early months of the pandemic, consumers in Canada had to adapt quickly to getting the goods they needed without a trip to the store. Discover the long-term impacts COVID-19 has had on how Canadians shop.



Consumer Spending During COVID-19

Canadian consumers have experienced steady retail spending throughout 2020. While it is comparable to the data on U.S. consumer spending, Canadians reported they were slightly more hesitant to spend during the pandemic and yet still expect to spend more this year than they did last year during the height of the lockdown.

35%

of Canadian consumers report that they spent *more* in 2020 than they did in 2019

33%

spent roughly the same in 2020 as they had in 2019

34%

expect to spend more in 2021 than they did in 2020

ONLY
32%

reported spending less in 2020 than they did in 2019

ONLY
18%

anticipate spending less in 2021 than they did in 2020

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The spending didn't stop at the big-box retailers though. Despite higher prices, more than three quarters of those surveyed said that they were more likely to shop small during the pandemic in an effort to support their local economy. **6 in 10** even said they would be willing to pay slightly higher prices for a product in order to support a small business.

Even more surprisingly, **62%** of consumers said that they would be willing to pay for shipping in order to support a small, local and/or independent retailer.

76%

report that they have chosen to shop with small, local, and/or independent retailers in order to support their local economy in recovering from the COVID-19 pandemic

47%

say they have discovered a new small ecommerce retailer via social media in the last year

73% of these respondents then made a purchase through a retailers website

Overall, Canadians report feeling more financially sound and have less hesitancy around spending. But the method in which Canadians shop may have been altered forever, with the majority preferring to shop online even after restrictions are lifted.

51%

report that they feel more financially stable than they did a year ago almost— and more comfortable spending money

43%

agree they are spending more in anticipation of going more places and participating in more activities as the pandemic ebbs

59%

say that they will prefer to shop online instead of in stores, even after the COVID-19 pandemic is over

Adapting to Supply Chain Anxiety



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While the supply chain suffered greatly around the world during COVID-19, Canadians have adapted better than other nations when it comes to hoarding in-demand products. The majority of Canadian consumers are still buying in bulk due to the anxiety of potentially being unable to restock, but it's **18% fewer** consumers than in the U.S.



53%

say that they were buying in bulk and/or buying increased volume of product due to accessibility concerns

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Online Shopping Across Retail Verticals

In quarantine, consumers were forced to get comfortable buying a wide variety of products online. And in Canada there was a dramatic increase in the adoption of the digital buying process across retail verticals.

75%

say that quarantine pushed them to buy items online that they would typically only purchase in-store before the pandemic

74%

say they are shopping online more as a result of the COVID-19 pandemic

61%

agreed that buying online is easier than it was one year ago

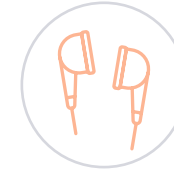
76%

say buying online offers a **better experience** now than it did one year ago

Products consumers preferred to buy online:

PREFERRED BEFORE COVID-19

ELECTRONICS & TOYS

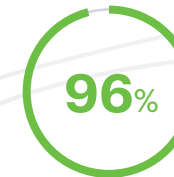


PREFERRED AFTER COVID-19

APPAREL & FASHION



HOME DECOR



BEAUTY/
PERSONAL
CARE
PRODUCTS



Products consumers still prefer to buy in-store:

GROCERIES & FURNITURE





Delivery & Pick Up Options

Since COVID-19, consumers have been able to enjoy and have grown to expect retailers to provide more convenient and increasingly free delivery and pickup options.

Here are 3 offerings consumers expected to see when buying online:



Free Shipping

75% agreed that they expected retailers to offer free shipping during COVID-19 to counterbalance slower shipping times



Convenient Returns

90% expected retailers to offer extended return windows due to potential shipping delays



Reduced or No-Contact Pickup

64% of consumers have taken advantage of curbside

58% of consumers have used buy online, pick up in store

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Delivery & Pick Up & Returns

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While COVID-19 brought too many challenges to count, there are certain conveniences and lifestyle changes we have embraced. In ecommerce, we've noticed that delivery, pickup and return options have grown in popularity among consumers even as businesses begin to reopen.

In fact, consumers are so hooked on the convenience and time savings of picking up their orders that many respondents claim these options will heavily influence their decision on whether to shop with a retailer.

60%

expect retailers to offer **curbside** indefinitely

68%

expect retailers to offer **buy online, pick up in store** indefinitely

56%

expect retailers to offer **free shipping** indefinitely

54%

expect retailers to offer **free returns** indefinitely

56%

expect retailers to offer **extended return windows** indefinitely

41%

say they're less likely to shop with retailers not offering curbside or buy online, pick up in store

While COVID-19 brought too many challenges to count, there are certain conveniences and lifestyle changes we have embraced. In ecommerce, we've noticed that **delivery, pickup and return options have grown in popularity** among consumers even as businesses begin to reopen.



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Overall, Canadians were very patient and understanding given the supply chain issues that arose during the height of the pandemic. However, as time has gone on, the vast majority hold retailers accountable for meeting pre-COVID expectations in regards to delivery speed.

82%

were forgiving of slower shipping times in 2020

70%

agree that COVID-19 made them lower or reset expectations around delivery speed

78%

now expect retailers to have figured out a way to offer the same shipping speeds as they did before COVID-19

After over a year of making most purchases online through delivery or pickup, consumers know what they're looking for when it comes to an ideal delivery experience. Overwhelmingly, they just want more visibility into the process.

77%

say they care more about real-time visibility into their shipping status

93%

want the ability to see and select shipping rates and speed during the checkout process

91%

want full visibility into expected shipping timelines before making the purchase

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Shipping Logistics & Delays

Whether or not you're able to provide free shipping for the foreseeable future, maintaining visibility into your shipping timelines and delivery estimates is critical for customer satisfaction.

91%

expect full transparency into shipping timelines and costs

56%

say that COVID has not made them any more willing to pay for shipping in exchange for faster delivery





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In-Store vs Online

While the large majority of consumers still prefer to avoid stores due to concerns surrounding the virus, a significant number of those surveyed also said they have resumed shopping in store as restrictions have been lifted.



7 in 10 prefer to shop online in order to avoid germs in stores



6 in 10 less likely to shop in stores due to concerns about COVID-19



63% have started shopping in stores again

69% feel ready to shop in stores again

RESPONDENTS SURVEYED →



FEMALE
51%



MALE
49%

AGE (AVG.)
43

Representation across 10 of 10 provinces - live and work in Canada





UNITED KINGDOM

The United Kingdom has seen multiple lockdowns over the past year and a half, disrupting many elements of daily life and business. However, in the world of ecommerce, both retailers and consumers in the sovereign state have adapted more than ever before to adopt online shopping. Learn how UK consumers have adapted over the last year, and what they expect from retailers as we begin to resume life after COVID-19.



Consumer Spending During COVID-19

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In the UK, consumer spending has also remained fairly consistent throughout the pandemic, and doesn't seem to be slowing down anytime soon. As the world finds normalcy again, retailers can expect nearly the majority to increase spending into the holiday season.

40%

of UK consumers report that they spent *more* in 2020 than they did in 2019

23%

spent roughly the *same* in 2020 as they had in 2019

42%

expect to spend *more* in 2021 than they did in 2020

ONLY
37%

reported spending **less** in 2020 than they did in 2019

85%

anticipate spending **more** in 2021 than they did in 2020

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Consumer Spending During COVID-19



And, given the unique impact COVID-19 has had on small businesses, the UK showed up to support small businesses during this difficult time.

73%

say they've chosen to shop with small, local, and/or independent retailers to help support their local economy during the pandemic

55%

say they have discovered a new small ecommerce retailer via social media in the last year

78% of these respondents then made a purchase through a retailers website

Spending hesitancy is on the decline:

56%

of UK consumers report that they feel more financially stable than they did a year ago almost — and more comfortable spending money

40%

agree that they are spending more in anticipation of going more places and participating in more activities as the pandemic ebbs

The way consumers in the UK spend may have been permanently altered:

PAST **89%**

of UK consumers say they have been shopping online more in the last year than they did before the pandemic

NOW **65%**

say that they will prefer to shop online instead of in stores, even after the COVID-19 pandemic is over

Adapting to Supply Chain Anxiety



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Luckily, supply chain anxiety seems to be on the decline among UK consumers:



ONLY
38%

of UK consumers say that they were buying in bulk and/or buying increased volume of product due to accessibility concerns

Online Shopping Across Retail Verticals

In quarantine, consumers were forced to get comfortable with buying a wide variety of products online.

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81%

say that quarantine pushed them to buy items online that they would typically only purchase in-store before the pandemic

89%

say they are shopping online more as a result of the COVID-19 pandemic

66%

say they will likely continue to do most of their shopping online long-term

75%

agreed that buying online is easier than it was one year ago

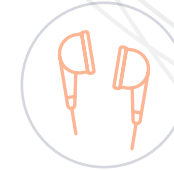
71%

say buying online offers a **better experience** now than it did one year ago

Products consumers preferred to buy online:

PREFERRED BEFORE COVID-19

ELECTRONICS



TOYS



SPORTING GOODS

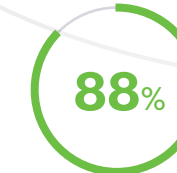


PREFERRED AFTER COVID-19

APPAREL & FASHION



HOME DECOR



BEAUTY/ PERSONAL CARE PRODUCTS



Products consumers still prefer to buy in-store:

GROCERIES



Despite this, UK consumers are still **110% more likely** to prefer shopping for groceries online now than they were before COVID-19.



Delivery & Pick Up Options

Retailers are to thank for this improved experience. While delivery and pickup options were becoming more common prior to 2020, the pandemic catapulted many into innovating ways to create a better, safer experience for their customers. Here are 3 ways retailers stepped up to the plate last year:

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Free Shipping

48% agreed that they expected retailers to offer free shipping during COVID-19 to counterbalance slower shipping times



Easy Returns

93% expected retailers to offer extended return windows due to potential shipping delays



Reduced Contact Pickup

42% of consumers have taken advantage of curbside

53% of consumers have used click and collect

Delivery & Pick Up & Returns



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These have become such popular and convenient options that consumers have grown to expect these as standard practice going forward.

48%

expect retailers to offer **curbside** indefinitely

72%

expect retailers to offer **click and collect** indefinitely

39%

expect retailers to offer **free shipping** indefinitely

53%

expect retailers to offer **free returns** indefinitely

46%

expect retailers to offer **extended return windows** indefinitely

They're so hooked on the convenience of simply picking up their orders that many respondents claim these options will heavily influence their decision on whether to shop with a retailer.



Only 2 in 10 say they're less likely to shop with retailers not offering curbside or click and collect



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And though UK consumers were patient while retailers navigated the supply chain issues caused by the halt of international import and export, they largely expect these issues to be figured out by now.

83%

were forgiving of slower shipping times in 2020

64%

agree that COVID-19 made them lower or reset expectations around delivery speed

82%

now expect retailers to have figured out a way to offer the same shipping speeds as they did before COVID-19

In addition to delivery speed, COVID-19 — and over a year of relying on delivered goods — has had a strong impact on what consumers are looking for when it comes to a seamless delivery. As delivery delays have grown through issues with the supply chain, online buyers are now searching for increased shipping options at checkout and more visibility into the cost and timelines associated with shipping.

67%

say they care more about real-time visibility into their shipping status

95%

want the ability to see and select shipping rates and speed during the checkout process

92%

want full visibility into expected shipping timelines before making the purchase

Shipping Logistics & Delays



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Giving visibility into your shipping timelines and estimates could potentially encourage more consumers to feel comfortable taking on the responsibility of shipping fees.

88%

expect full transparency into shipping timelines and costs

58%

say that COVID has not made them any more willing to pay for shipping in exchange for faster delivery



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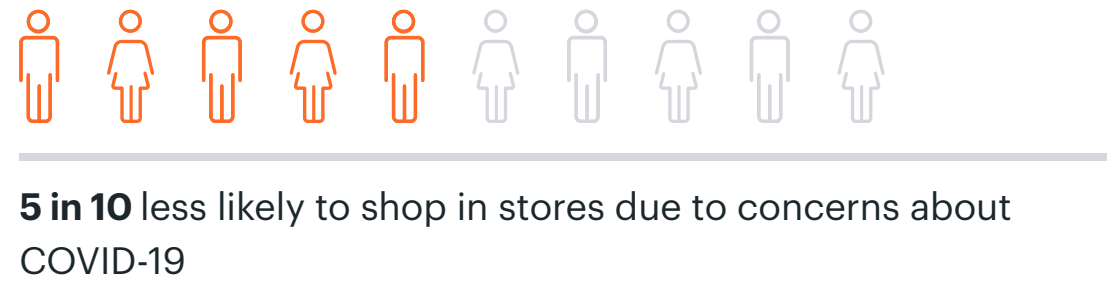
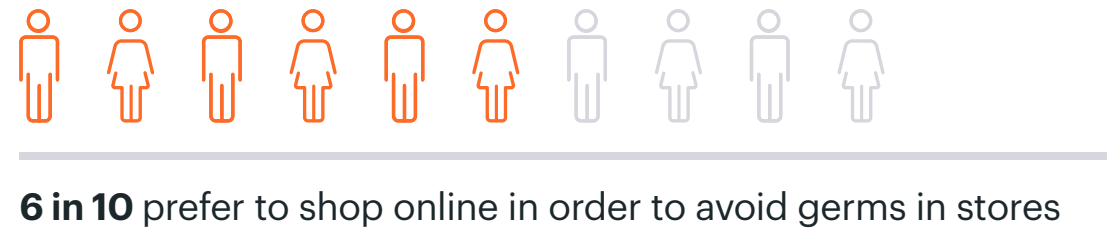
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In-Store vs Online

Due to the continued increase in cases and variants circulating around Europe, the majority of UK consumers are still opting to shop online due to safety concerns.




36% have started shopping in stores again


Unlike the reports from the rest of the world, consumers in the UK are still largely hesitant to shop in stores.

RESPONDENTS SURVEYED →

ONLINE SHOPPERS
500




FEMALE
57%



MALE
43%

AGE (AVG.)
37



Representation across England (87%), Scotland (8%), Wales (3%), Northern Ireland (2%) - live and work in the UK



AUSTRALIA

Australians fared fairly well compared to the rest of the world during the height of the pandemic. But regardless of bouncing back quicker, retailers still faced challenges and had to quickly adapt to address consumer demand. Not just that, but increasingly high expectations too. Let's explore how COVID-19 has impacted consumer behaviors and expectations.



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Ecommerce and retail spending has been relatively undisturbed. Australian consumers reported spending more in 2020 than any other surveyed audience, translating into a lower spending hesitancy as a result of COVID-19.

45%

of Australian consumers report that they spent *more* in 2020 than they did in 2019

35%

spent roughly the *same* in 2020 as they had in 2019

33%

expect to spend *more* in 2021 than they did in 2020

ONLY
20%

reported spending less in 2020 than they did in 2019

ONLY
15%

anticipate spending less in 2021 than they did in 2020

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Consumer Spending During COVID-19



And, given the unique impact COVID-19 has had on small businesses, Australians showed up to support small businesses during this difficult time.

Showed up to support small:

79%

say they've chosen to shop with small, local, and/or independent retailers to help support their local economy during the pandemic

54%

say they have discovered a new small ecommerce retailer via social media in the last year

81% of these respondents then made a purchase through a retailers website

Spending hesitancy is on the decline:

55%

of Australian consumers report that they feel more financially stable than they did a year ago – and **58%** are more comfortable spending money

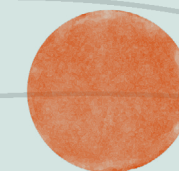
54%

agree that they are spending more in anticipation of going more places and participating in more activities as the pandemic ebbs

But the way consumers in Australia spend may have been permanently altered:

56%

say that they will prefer to shop online instead of in stores, even after the COVID-19 pandemic is over





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Supply chain anxiety seems to continue for Australian consumers:

ONLY
45%

of Australia consumers say that they were buying in bulk and/or buying increased volume of product due to accessibility concerns including inventory shortages and shipping delays



Online Shopping Across Retail Verticals

In quarantine, consumers were forced to get comfortable with buying a wide variety of products online.

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62%

say that quarantine pushed them to buy items online that they would typically only purchase in-store before the pandemic

All in all, there has been widespread digital adoption of the online purchasing process.

61%

say they are shopping online more as a result of the COVID-19 pandemic

54%

say they will likely continue to do most of their shopping online long-term

83%

agreed that buying online is easier than it was one year ago

76%

say buying online offers a **better experience** now than it did one year ago

Products consumers *preferred* to buy online:

PREFERRED BEFORE COVID-19

Australians preferred to shop in-store vs. online in almost every retail vertical

PREFERRED AFTER COVID-19



Delivery & Pick Up Options

Retailers are to thank for this improved experience. While delivery and pickup options were becoming more common prior to 2020, the pandemic catapulted many into innovating ways to create a better, safer experience for their customers. Here are 3 ways retailers stepped up to the plate during 2020:

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Free Shipping

64% agreed that they expected retailers to offer free shipping during COVID-19 to counterbalance slower shipping times



Easy Returns

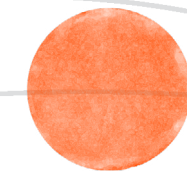
83% expected retailers to offer extended return windows due to potential shipping delays



Reduced Contact Pickup

52% of consumers have taken advantage of curbside

54% of consumers have used click and collect



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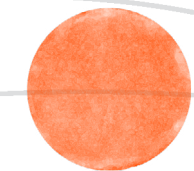
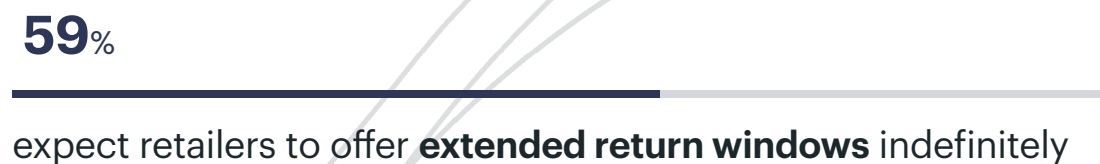
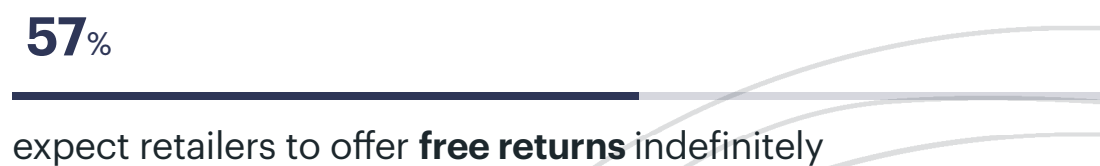
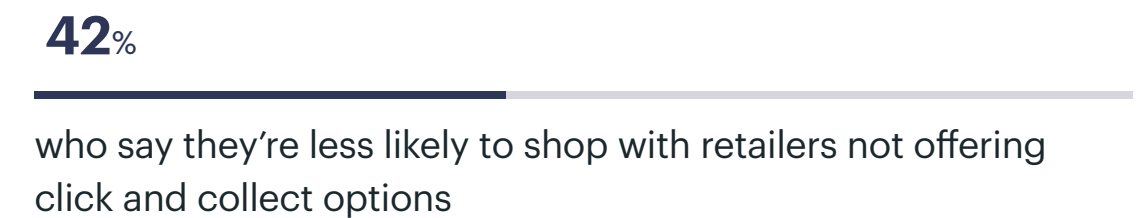
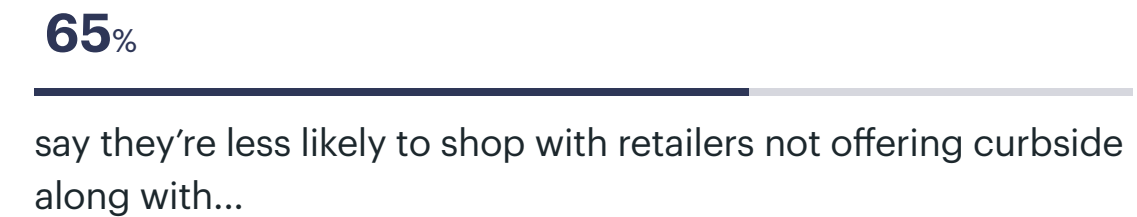
Global Pulse on Expectations

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Delivery & Pick Up & Returns

These delivery and pick up options have become such popular and convenient options that consumers have grown to expect them as standard practice going forward.

They're so hooked on the convenience of simply picking up their orders that many respondents claim these options will heavily influence their decision on whether to shop with a retailer.



Shipping Logistics & Delays

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And though Australian consumers were patient while retailers navigated the supply chain issues caused by the halt of international import and export, they largely expect these issues to be figured out by now.

78%

were forgiving of slower shipping times in 2020

79%

agree that COVID-19 made them lower or reset expectations around delivery speed

77%

now **expect retailers to have figured out a way to offer the same shipping speeds as they did before COVID-19**

In addition to delivery speed, COVID-19 — and over a year of relying on delivered goods — has had a strong impact on what consumers are looking for when it comes to a seamless delivery. The shift in priority now places more value on shipping options at checkout and increased visibility into the cost and timelines associated with shipping.

78%

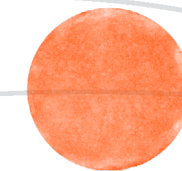
say they care more about real-time visibility into their shipping status

90%

want the ability to see and select shipping rates and speed during the checkout process

86%

want full visibility into expected shipping timelines before making the purchase



Shipping Logistics & Delays



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Regardless of whether your ecommerce store can provide standard free shipping on all orders to incentivize more sales, consumers demand retailers provide clear delivery timelines and shipping fee estimates with every online order.

87%

expect **full transparency into shipping timelines and costs**



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In-Store vs Online



Research shows that Australians have the lowest percentage of consumers who prefer online shopping due to concerns about the virus spread.



5 in 10 prefer to shop online in order to avoid germs in stores



4 in 10 less likely to shop in stores due to concerns about COVID-19

89%

have started shopping in stores again

This also means Australia has experienced the highest rate of consumers currently shopping in stores.



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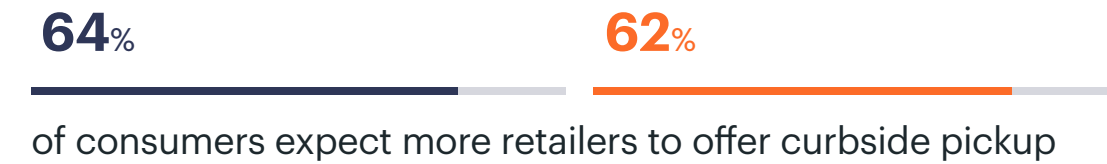
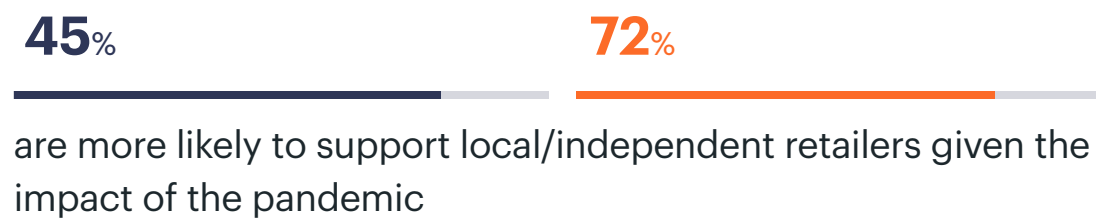
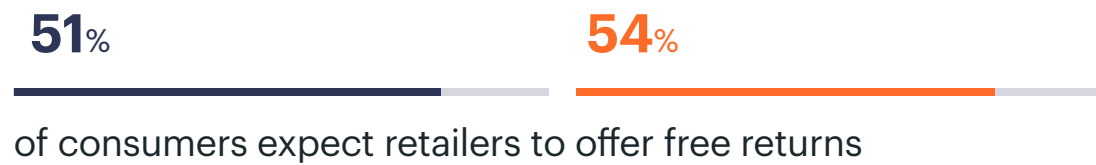
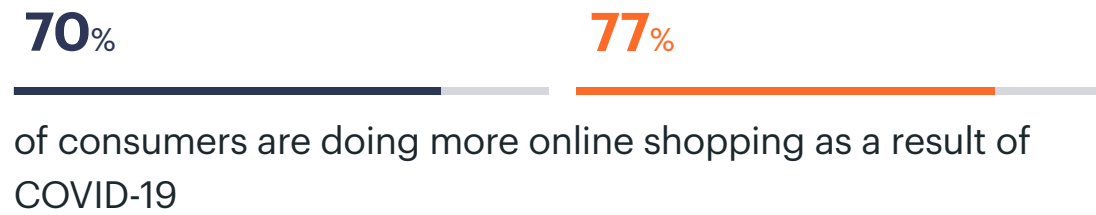
Global Pulse on Expectations

About ShipStation

A lot has changed since our original study in March 2020. See how consumer expectations and behaviors have evolved since the beginning of the pandemic.

● **APRIL 2020**
(US & UK only)

● **MARCH 2021**



The Global Pulse on Consumer Expectations Into 2022

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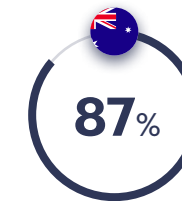
About ShipStation

Given the data, there are a few predictions we can make about consumer behaviors going into the next year.

1

Free Shipping

Free shipping is preferred. But, if you can't offer free shipping, be prepared to provide full transparency into the shipping rates and delivery timelines before your customer completes their purchase.



agree they expect full transparency into shipping timelines and costs if a brand doesn't offer free shipping

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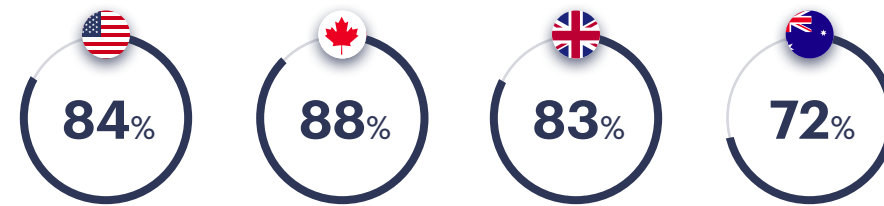
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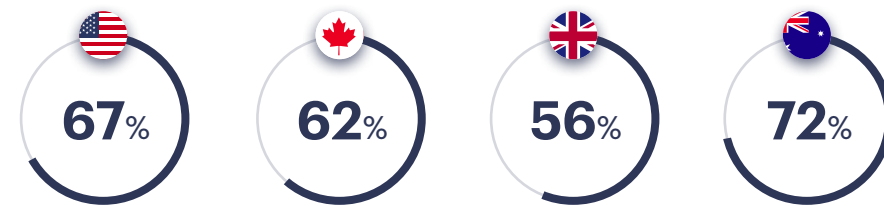
2

Order Visibility

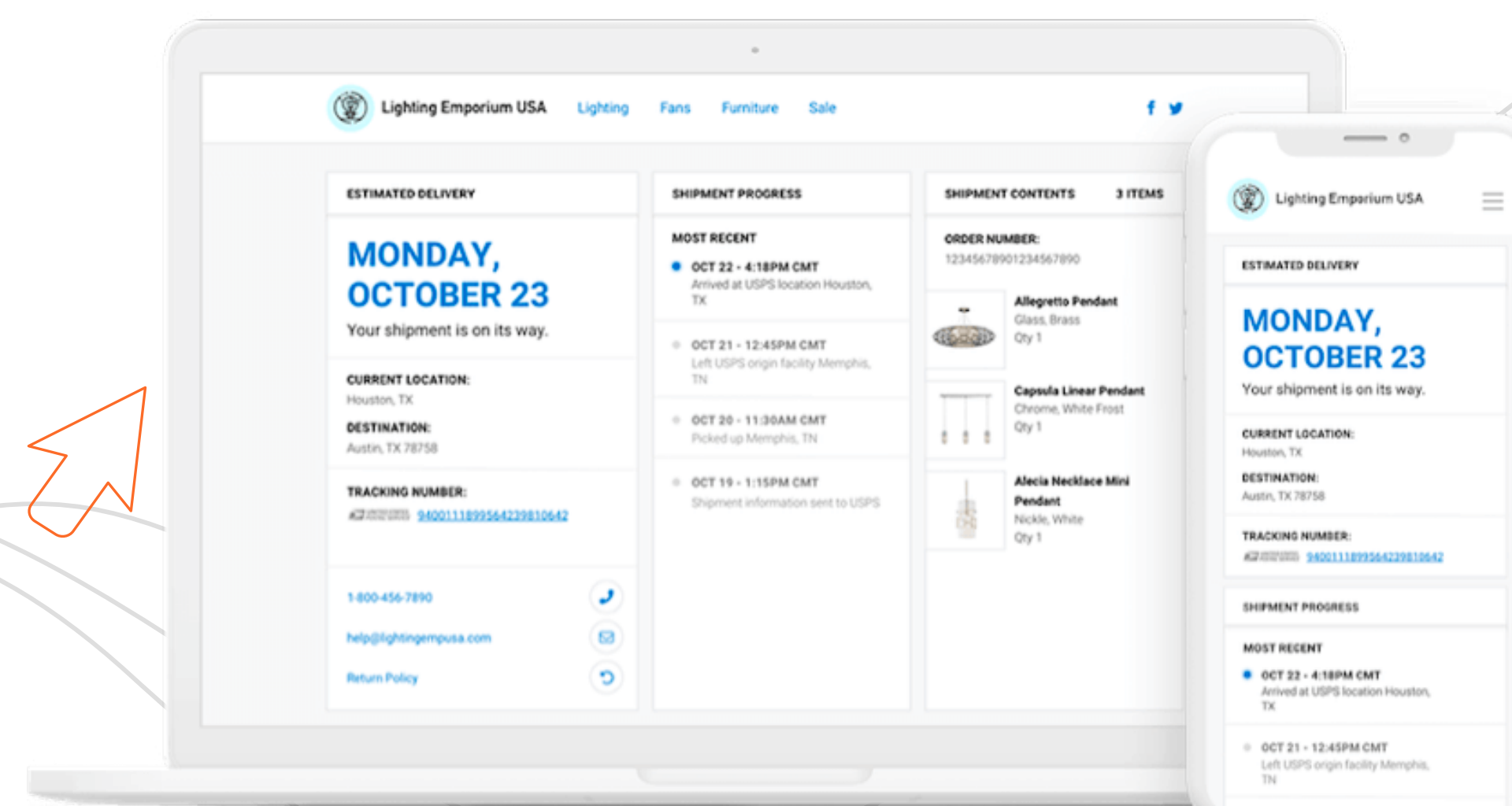
The majority of consumers around the world expect clear, consistent, and branded communications about their orders and returns.



expect retailers to provide branded shipping and returns status updates via email



expect retailers to provide branded shipping and returns status updates via SMS



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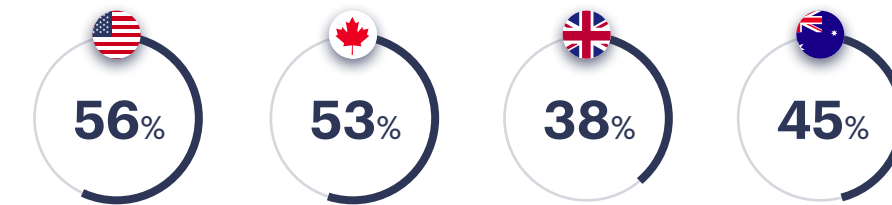
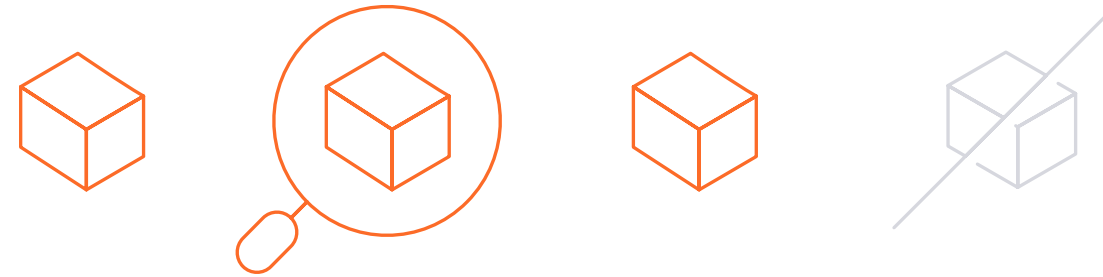
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3

Supply Chain Anxiety

Despite having resolved most of the supply chain issues since the onset of COVID-19, retailers should expect some level of consumer anxiety and/or concerns around product availability.



reported they are still buying in bulk and/or increased volumes of product

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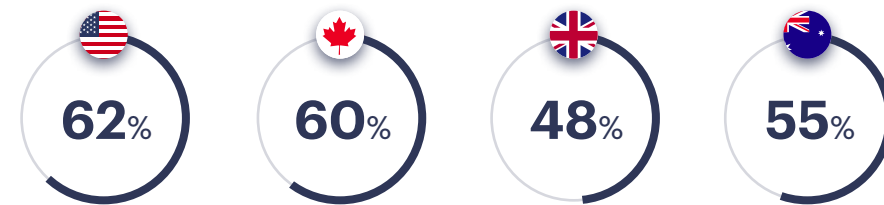
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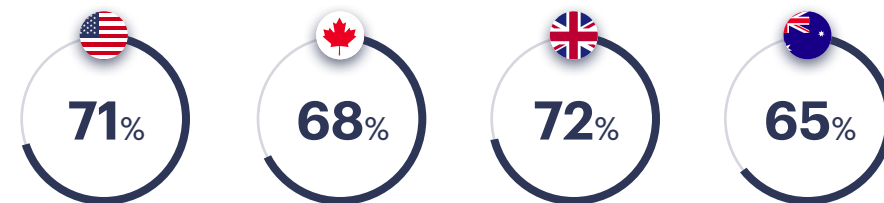
4

Delivery Options

Customers around the world expect more reduced contact delivery options at checkout, including curbside pickup and buy online, pick up in store options.



expect retailers to offer curbside from now on

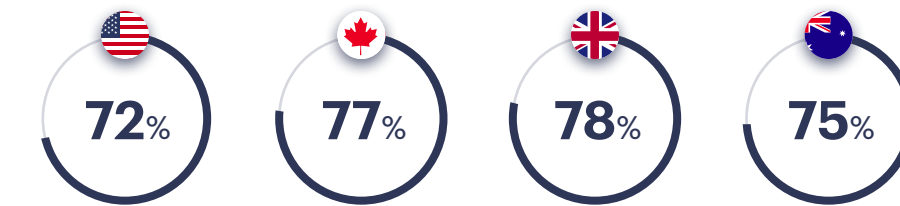


expect retailers to offer BOPIS from now on

5

Support Small

The majority of consumers around the world are more aware of and interested in showing support for small, independent, and local businesses.



said that seeing the impact to small/local/independent retailers from the pandemic has made them more likely to support those businesses

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ShipStation®

About

Every day, tens of thousands of ecommerce retailers rely on ShipStation to help scale their business and provide a great customer delivery experience.

ShipStation is a multi-channel, multi-carrier order and delivery management platform that streamlines and automates key ecommerce processes, with over 300 integrations to all major selling channels, ecommerce platforms, and carriers, including Amazon, eBay, Shopify, Magento, BigCommerce, Royal Mail, DPD, Hermes, UPS, and more. ShipStation is a global business, headquartered in Austin, TX — with offices in Sydney, London, and Paris — and is a wholly-owned subsidiary of Stamps.com.

For more information, visit shipstation.com.

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