



E-commerce in the Nordics

Six-month report 2018

postnord

Förord

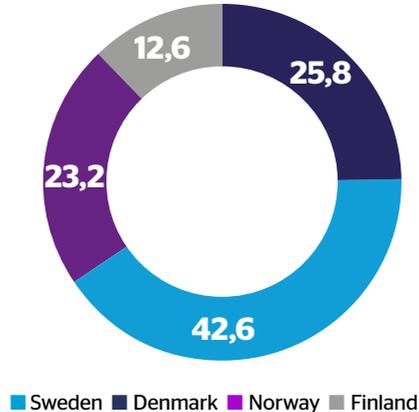
E-commerce development

Nordic e-commerce grew by 11 % in the first six months of 2018

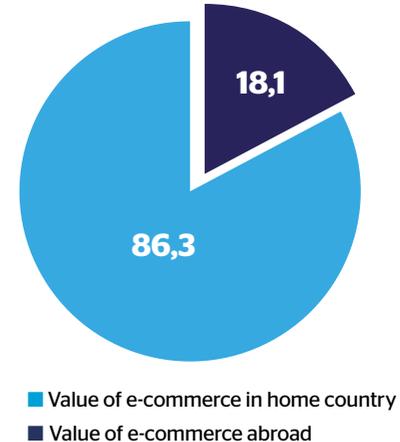
Nordic e-commerce grew by 11% in the first six months of 2018 compared with the same period last year. Consumers indicate that they made online purchases totaling SEK 104.3 billion during the first half of 2018. Sweden is the largest e-commerce market with SEK 42.6 billion, followed by Denmark with 25.8, Norway with 23.2 and Finland with 12.6 billion.

Just over 80 percent of Nordic e-commerce sales go to domestic consumers and barely 20 percent are purchased from abroad. Domestic Nordic commerce is expected to reach SEK 86.3 billion while Nordic commerce from abroad amounts to SEK 18.1 billion. Nordic foreign commerce primarily takes place from the major e-commerce markets: the UK, China, Germany or the US. The scope of foreign commerce also tends to vary between the countries. Finnish consumers especially state that they shop a great deal from abroad, while Swedes do not do so to the same extent.

Value of online purchases by Nordic consumers during the first six months of 2018 (SEK)



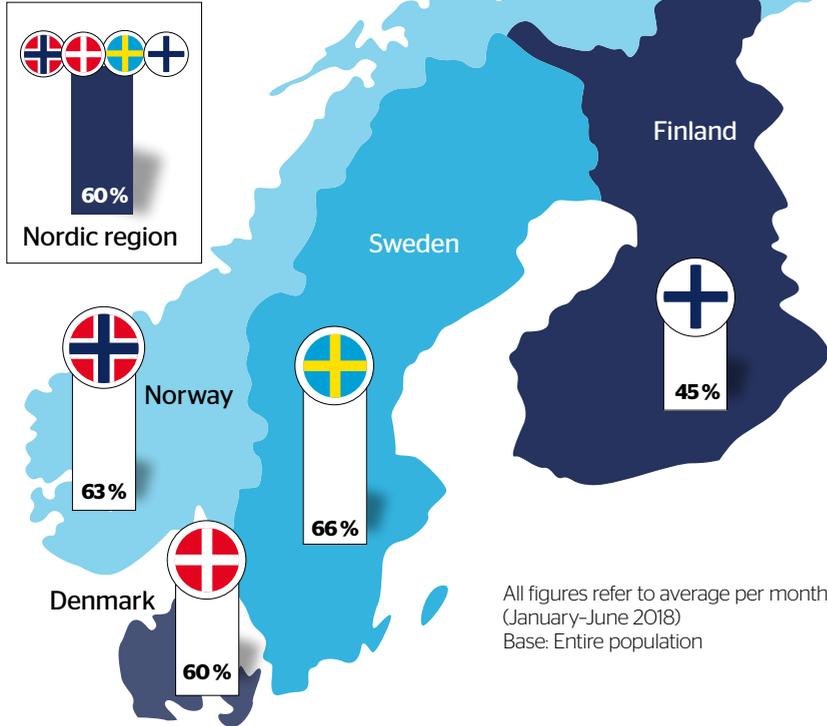
Value of online purchases by Nordic consumers in each home country and abroad (SEK)



E-commerce development

Mature e-commerce nations in continued movement

Percentage of consumers who shopped online



All figures refer to average per month (January-June 2018)
Base: Entire population

The Nordic region is one of the most mature e-commerce markets in Europe and e-commerce in the Nordic region continues to expand. Six out of ten Nordic residents shop online on a monthly basis, which corresponds on average with nearly 12 million people. The fact that more and more consumers are choosing to buy their goods online has made e-commerce increasingly important for Nordic retail companies and e-commerce is currently a significant growth force. The conditions for selling and purchasing online are favorable in the Nordic region, given the population's high level of e-commerce maturity, high internet penetration, well-built infrastructure and motivated e-commerce players. Other factors that influence the good conditions are that Nordic consumers have an easy time adopting new

behaviors and they are tech-savvy.

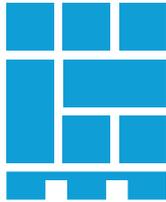
E-commerce maturity differs among the Nordic countries. In terms of the percentage of consumers who shop online, e-commerce is most prevalent in Sweden. Two of three people in Sweden shopped online during the first six months of 2018. Danish and Norwegian consumers are just behind them. Finnish consumers shop less online than their fellow Nordic residents. There are several explanations for this fact. For example, the country has a different language and less purchasing power in general than the other Nordic countries. In addition, Finnish consumers still have a more cautious attitude toward digital behaviors than their neighbors. However, this permits for greater growth potential moving forward through the possibility of a "catch-up" effect.

E-commerce development

A snapshot: Sweden



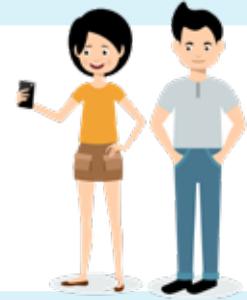
✓ The largest e-commerce market in the Nordic region (SEK 42.6 billion)



✓ Buy the most beauty and wellness products (31%* per month)



✓ Highest share of online customers aged 18-29 (72%* per month)



✓ Highest interest in physical shopping in city centers (29%* made their last purchase in a city center)



✓ Clearly the most advanced when it comes to buying pharmacy products online (18%* per month)



✓ Largest percentage to shop online from Germany (28%**)



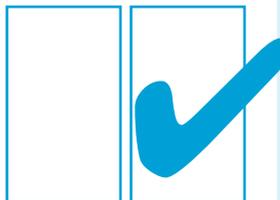
A snapshot: Denmark



✓ Highest interest in home deliveries that are left outside the door without confirmation (17%*)



✓ Most used to freedom of choice for deliveries (70%* get to choose how they want their item delivered)



✓ Spend the most on groceries online (SEK 1549 *** per month)



✓ Largest percentage to shop online from the UK (33%**)



✓ Most satisfied with delivery of an item purchased online (90%)



E-commerce development

A snapshot: Norway



✓ Clearly buy the most sports and leisure products (13%* per month)



✓ Greatest interest in e-commerce platforms (60%* shop from e-commerce platforms every month)



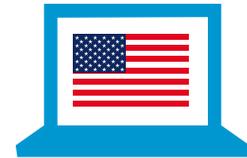
✓ 71% of people aged between 18 and 29 shop online every month



✓ Greatest interest in shopping in physical shopping centers (29% per month)



✓ Largest percentage to shop from the US (23%**)



*of those who shopped online, **of those who shopped online from abroad

E-commerce development

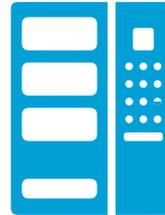
A snapshot: Finland



✓ Highest percentage to make their last e-commerce purchase via computer (31%)



✓ Highest percentage of e-commerce consumers who prefer delivery to a parcel machine (68%*)



✓ Spend the most on beauty and wellness (SEK 648*** per month)



✓ Biggest fans of buying clothes and shoes online from abroad (41% per month*)



✓ Highest percentage to have shopped online from abroad (40%* per month)



✓ Biggest percentage to shop online from Sweden (23%**)



E-commerce development

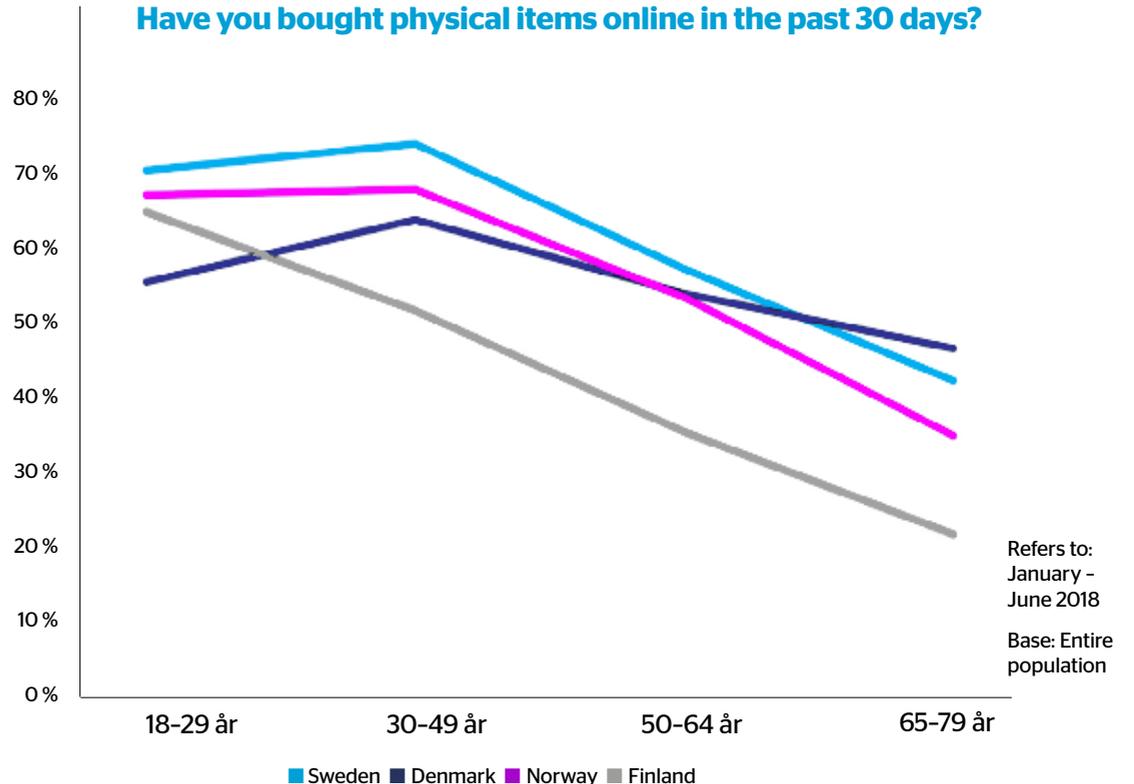
Younger consumers shop more

Consumer attitudes toward e-commerce is primarily a generational matter. All of the Nordic countries demonstrate the same declining age curve between younger and older consumers when it comes to the inclination to shop online. Younger consumers have grown up with digital technology and since childhood, they have adopted digital behaviors while older consumers have had to adapt as digital technology takes up more and more space in commerce.

However, it is not the youngest age group (18-29) that shops online the most. In Sweden, Denmark and Norway, the highest percentage of online shoppers are in the age range of 30-49. This is probably due to a combination of being accustomed to shopping online, high purchasing power and demand. Many families with children are included in this range, which increases consumption. The country that deviates from this trend is Finland, where only the youngest age category is consistent with the rest of the Nordic region.

The age difference in the inclination to shop online is going to drive e-commerce growth for many years moving forward. As the age groups that are accustomed to shopping online gradually age and new consumers increase the total number of e-commerce consumers, the age difference will gradually flatten out and become more even.

Have you bought physical items online in the past 30 days?



E-commerce development

Fashion industry grows sharply online

Clothes and shoes dominate when Nordic residents shop online. This is thanks largely to a big selection, free returns and pressure to keep prices down through increased competition from abroad. The percentage of Nordic residents to buy clothes online continues to increase in all Nordic countries, which has had a negative effect on many physical fashion stores. In a comparison between domestic fashion retailing and foreign fashion retailing, it can be seen that Nordic residents prefer to shop online from their own country. The exception is Finland, where consumers must look to other countries in order to be satisfied with the selection and price due to the fact that there are fewer domestic players.

Next after clothes and shoes, people shop for home electronics, books and beauty and wellness products. Goods in these industries are well-suited for e-retail because they are relatively easy to ship and they are often homogenous, which facilitates price comparisons.

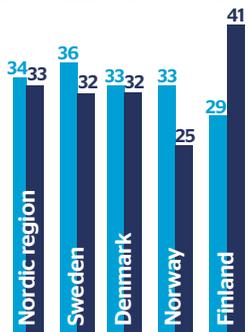
One important industry that continues to grow sharply online is groceries. The reason for this is that the national chains, for example ICA and COOP in Sweden, have an increasingly strong presence online and have started to launch their e-commerce strategies in earnest.

What types of physical items have you bought online in the past 30 days? Percentage that shop from webshops

Basis: Purchased goods online in the past 30 days	Nordic region	Sweden	Denmark	Norway	Finland
 Clothing/shoes	37 % ↑	39 % ↑	37 % ↑	35 % ↑	36 % ↑
 Home electronics*	23 %	22 %	26 %	23 %	22 %
 Media**	24 %	26 %	20 %	24 %	25 %
 Beauty/wellness	23 % ↑	31 % ↑	16 % ↑	22 % ↑	18 %
 Sports/leisure	11 %	11 %	10 %	13 %	9 % ↑
 Car/boat/motorcycle accessories	5 %	5 %	4 %	7 % ↑	5 %
 Children's items/toys	5 %	6 %	6 %	5 %	4 % ↑
 Groceries	11 % ↑	12 % ↑	11 % ↑	10 %	8 % ↑
 Furniture/interior decor	10 %	11 %	12 %	9 %	9 %



E-commerce consumption of clothes and shoes



■ Domestic (Percentage that shop from domestic webshops)
 ■ Foreign (Percentage that have shopped online from abroad)

*Includes products such as computers and computer accessories, cell phones and audio visual products

**Includes products such as books, CDs and movies

E-commerce development

Higher purchase amounts – a key for growth

There are significant differences between how much consumers in different countries spend online - and how much they spend on different types of goods. Norwegians spend the most per month in general, closely followed by Danes. In third place are Swedish consumers, followed by the Finns. This distribution is logical in that it reflects general variations in purchasing power, salaries and prosperity in each country. Consumers who buy home electronics are often prepared to spend a huge sum of money when they are in the mood to shop and home electronics present the very highest purchasing sums with respect to product category.

The category of groceries is less mature in terms of e-commerce, and notably, Danes shop online for more than 40% more than the average in other Nordic countries. This is probably partly due to the fact that the shorter distances and higher population density provide conditions for handling logistics in such a way that satisfies customers.

As e-commerce matures, in terms of growth it becomes more and more important for companies to identify how to attract existing customers to buy more. Strengthening customer loyalty and encouraging additional purchases, for example through cross-selling, a high level of service and individually adapted offers may therefore become increasingly central competitive advantages.

Estimated amount that consumers in each product category spend online, per month (SEK)

Basis: Purchased goods online in the past 30 days	Nordic region	Sweden	Denmark	Norway	Finland
 Home electronics	1947	1916	2095	2132	1675
 Car/boat/motorcycle accessories	1572	1549	1654	1741	1365
 Sports/leisure	1260	1238	1224	1532	1078
 Groceries	1194	1176	1549	1227	824
 Clothing/shoes	1168	1176	1269	1225	995
 Children's items/toys	861	848	1056	874	665
 Beauty/wellness	605	567	639	594	648
 Media	531	505	607	521	507

E-commerce development

Cell phones transform the purchasing landscape

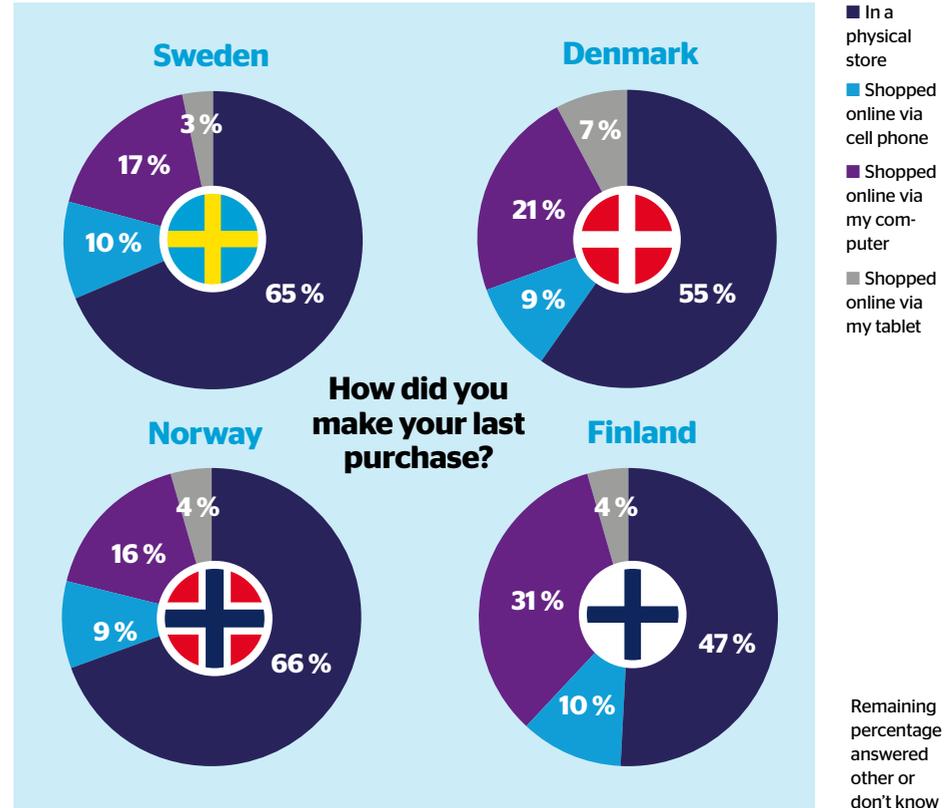
Mobile devices have become an important part of e-commerce and have helped make consumers' purchasing processes simpler and more flexible. Thanks to the cell phone, consumers can shop online from anywhere. In addition, companies' conditions for inspiring consumers with tailored offers have improved. New payment solutions, one-click purchases, mobile price comparisons and the ability to check stock in real time are other applications that are helping to transform the retail landscape.

Despite the rapid growth of e-commerce, physical retail is preferable in many situations and in general, digital retail is not suitable for everyone. Swedes and Norwegians have the highest percentage to state that their most recent purchase was in a physical store (and not online). However, a difference can be seen: Swedes shop in city centers to a greater extent, while Norwegians prefer shopping centers.

More and more Nordic residents

are using their cell phones to shop. With regard to how the last purchase was carried out, the distribution of mobile purchases was even among the Nordic countries. Instead, what differentiates Nordic residents in this regard is the use of tablets and computers. Denmark is clearly home to the highest percentage of people who prefer to shop online via tablet. Finnish consumers can be considered slightly more conservative in their online purchases, as they distinguish themselves by shopping online via computer the most.

The Nordic countries are at the leading edge in relation to the average in Europe when it comes to the mobile development, but some European countries - especially the United Kingdom - have come even further. E-commerce with mobile devices will probably continue to gain ground throughout Europe, and the cell phone's advances as a tool for shopping are accelerating digital development on all levels.



E-commerce development

Global competition

ONLINE PURCHASES FROM FOREIGN SITES

Foreign webshops attract Nordic consumers to shop online by offering unique goods, a large product selection and in many cases, also lower prices. In the first six months of 2018, on average, one in three Nordic e-commerce consumers stated that they had shopped from abroad. Finland and Norway are the Nordic countries whose residents shop outside national borders to the greatest extent. Two in five Finnish online consumers made at least one foreign purchase during the time period. Finnish online consumers also stand out for primarily buying fashion products abroad, which can probably be explained by a weak domestic fashion selection online.

Swedes' foreign shopping online sharply declined in the first half of 2018 compared with the same period last year. One important explanation for this decline is the handling fee for parcels imported from non-EU countries, which PostNord introduced on March 1, 2018. The fee has primarily subdued purchases from China, which diminished during the first half of the year. PostNord is in the process of negotiating with Chinese e-commerce platforms for a more automated payment solution. A return to previous trade activities between the countries is therefore likely in the future.



How much the different countries shop online from abroad per month

	Jan	Feb	March	April	May	June
Sweden	26 %	22 %	20 %	15 %	17 %	18 %
Denmark	29 %	30 %	29 %	31 %	28 %	25 %
Norway	38 %	37 %	35 %	33 %	34 %	34 %
Finland	42 %	40 %	39 %	37 %	40 %	41 %

E-commerce development

Nordic residents' shopping from abroad

ONLINE PURCHASES FROM FOREIGN SITES

In Europe, it is Nordic residents who shop online from abroad to the greatest extent. This can be explained by factors such as the fact that the countries have a high level of digital maturity in general and high domestic price points, and that they have small populations, resulting in a limited domestic product offering. People in the Nordic region primarily shop from China, the UK and Germany. Even though, globally, the US is the hottest market for e-commerce, Nordic interest is relatively weak.

Denmark is unique in that the UK is its favorite country from which to shop online and Danes' e-commerce consumption from the UK continues to increase. So far in 2018, Swedes' favorite has been Germany and on average 28 percent of Swedish online consumers have shopped from there. Swedes' favorite store in Germany is the European internet giant Zalando. Norwegians stand out for shopping from the US. One important explanation is the American e-commerce platform eBay, which is very popular among Norwegian online consumers. 27 percent of Norwegians have used eBay in the past year.

Of the Nordic countries, Sweden is obviously the most popular e-commerce destination in the eyes of Nordic residents. Finnish consumers are particularly keen to shop online from Sweden.

From which foreign countries have you bought goods online in the past month? Top 5

Basis: Purchased goods online in the past 30 days	Sweden	Denmark	Norway	Finland
China 	26 %	25 %	33 %	29 %
UK 	27 %	33 %	24 %	14 %
Germany 	28 %	26 %	10 %	23 %
USA 	15 %	9 %	23 %	9 %
Denmark 	7 %			
Sweden 		14 %	13 %	23 %

A blocked field means that the response option is either outside the Top 5 or is not applicable.

Top 3, Rest of Nordics

Basis: Purchased goods online in the past 30 days	Sweden	Denmark	Norway	Finland
Purchased from Sweden		14 %	13 %	23 %
Purchased from Denmark	7 %		5 %	3 %
Purchased from Norway	1 %	2 %		2 %
Purchased from Finland	1 %	0 %	1 %	

A blocked field means that the response option is either outside the Top 5 or is not applicable.

E-commerce development

Foreign online shopping of groceries takes root

ONLINE PURCHASES FROM FOREIGN SITES

Clothing and shoes continue to dominate as the most popular items purchased online in the Nordic region. The previously strong increase has slowed slightly, except in Finland, where the share to buy fashion items from abroad has increased by 4 percentage points compared with the same period last year. Interesting to note is that the share of Nordic residents who shop for clothes online from their home country is larger than the share that shops for the same product category from abroad. The exception is Finland, where the percentage that shops from abroad is greater.

The product category with the strongest increase is groceries, however from low levels. In terms of percentage, Norwegians consume the most in this category. This may be because Norwegian grocery prices are high, which makes foreign online purchases attractive.

Home electronics are the second most common product category for Nordic residents who shop online from abroad. One in five Nordic residents shop online for home electronics from foreign webshops. Media is the third most popular foreign category among Nordic residents, and Amazon Books is a strong player. Relative to other countries in the Nordic region, Sweden's foreign media purchases are slightly lower. A possible explanation is that Sweden has strong domestic webshops in the media category. Other popular product categories with stability on the market are accessories for cars, boats and motorcycles, as well as items for children.

What types of physical items have you bought online in the past 30 days? Percentage that shop from foreign webshops

Basis: Have purchased goods online from abroad in the past 30 days	Nordic region	Sweden	Denmark	Norway	Finland
 Clothing/shoes	33 %	32 % ↑	32 % ↑	25 %	41 % ↑
 Home electronics*	19 %	18 %	19 %	22 %	18 %
 Media**	15 %	12 % ↑	17 %	18 % ↑	15 % ↑
 Beauty/wellness	10 %	7 %	12 % ↑	12 %	12 %
 Sports/leisure	9 %	11 %	9 %	7 %	7 %
 Car/boat/motorcycle accessories	8 %	10 % ↑	6 %	8 %	7 %
 Children's items/toys	4 %	4 %	4 %	4 %	3 %
 Groceries	3 % ↑	2 % ↑	2 %	6 % ↑	3 % ↑

*Includes products such as computers and computer accessories, cell phones and audio visual products

**Includes products such as books, CDs and movies

Delivery today

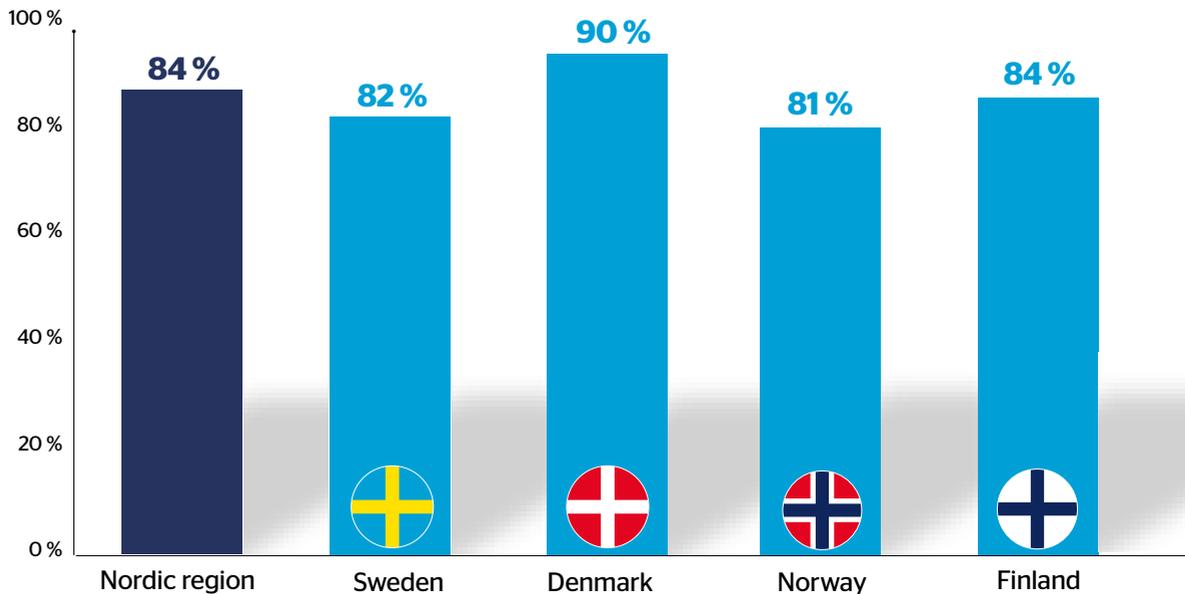
Nordic online consumers have high demands

High demands are placed on e-commerce deliveries in the Nordic region. In order to meet the high expectations of Nordic consumers, webshops and logistics players must collaborate to create a smooth delivery experience. Overall, consumers in the Nordic region are satisfied with deliveries of e-commerce purchases. More than nine out of ten Nordic e-commerce consumers were pleased with the delivery of their latest e-commerce purchase. Younger consumers place higher demands on deliveries than older consumers, and their delivery satisfaction is therefore lower. This correlation can be seen in all Nordic countries. Total delivery satisfaction is highest in Denmark, but the differences between the countries are relatively small.

However, in all Nordic countries, the share of satisfied consumers has decreased since last year. One reason may be that consumers' expectations for deliveries are constantly increasing. In order to be equipped for the future, webshops and logistics players must therefore create a closer partnership. Online consumers' requirements for delivery time, delivery method, communication and service are only expected to increase in the coming years.

Think back to your most recent online purchase of a product or products. How satisfied were you with the delivery?
(Percentage to respond that they are very or fairly satisfied)

Basis: Purchased goods online in the past 30 days



Delivery today

Distribution points dominate in the Nordics



DELIVERY METHOD

E-commerce consumers in the Nordic region use different delivery methods to obtain their goods. The most common method by far in all Nordic countries is to collect the item from a distribution point. Presumably, many Nordic residents believe this option is convenient and flexible as it permits them to choose when to collect the parcel themselves.

Another popular method is to have the parcel delivered to their mailbox. This method is most common in Sweden and Norway. Danes prefer home deliveries left outside the consumer's door instead. This is a method which is still uncommon in the other Nordic countries.

Consumers in Denmark and Finland are alone in using parcel machines. Reasons include that there are many parcel machines in both Denmark and Finland, and the machines are vigorously marketed in these countries.

Think back to your most recent purchase of a product/products online. How was your product delivered?

Basis: Purchased goods online in the past 30 days	Nordic region	Sweden	Denmark	Norway	Finland
I collected it myself from a distribution point	56 %	66 %	34 %	62 %	50 %
It was delivered to my mailbox/ multi-occupancy mailbox	17 %	19 %	10 %	22 %	15 %
It was delivered to my home and left outside my door (without me needing to sign to confirm receipt of the product).	6 %	3 %	17 %	3 %	3 %
It was delivered to my home during the day (not in my mailbox) and I had to sign to confirm receipt of the product	5 %	4 %	8 %	3 %	6 %
I collected it myself from a parcel machine	5 %	0 %	10 %	0 %	11 %
I collected it myself from the webshop's physical store	2 %	2 %	2 %	2 %	3 %
It was delivered to my workplace	1 %	0 %	4 %	1 %	1 %
It was delivered to my home in the evening (not in my mailbox) and I had to sign to confirm receipt of the product	1 %	2 %	0 %	2 %	1 %

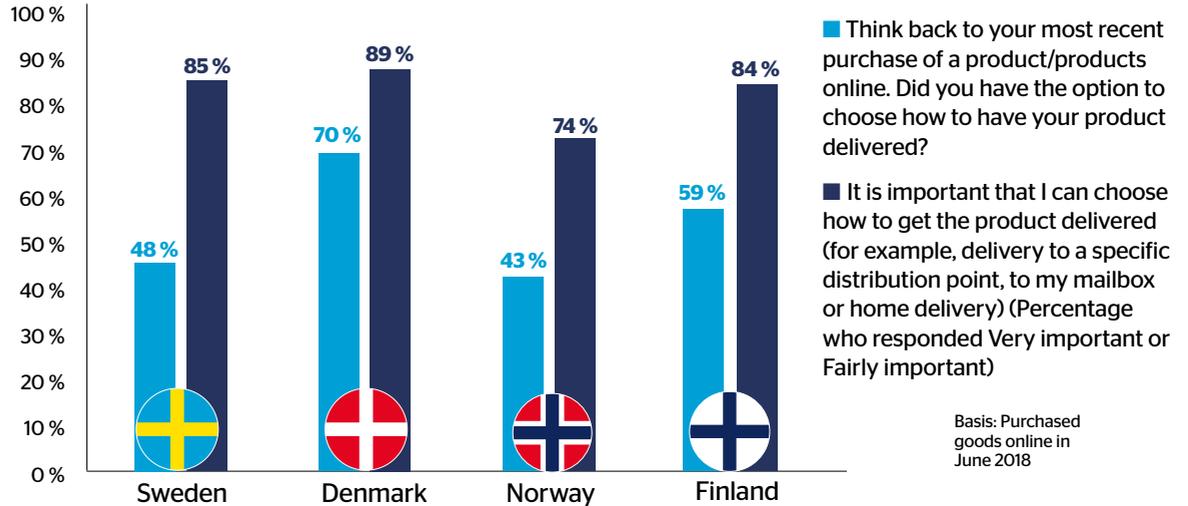
Delivery today

Consumers demand greater freedom of choice online

FREEDOM OF CHOICE REGARDING DELIVERY

Nordic online consumers want to be able to choose the delivery method that suits them best. However, far from all webshops offer this opportunity today. The greatest freedom of choice can be found in Denmark, where seven in ten online consumers are permitted to choose their delivery method. The percentage is lower primarily in Sweden and Norway, where not even half of online consumers have the opportunity to choose. However, the percentage of consumers to state that they have gotten to choose how their orders are delivered has increased in the past year.

It is important that webshops understand the significance of deliveries taking place on the customer's terms. Otherwise, they risk losing sales. The fact is that more than one fourth of online consumers report having at some point abstained from making a purchase from an e-retailer because the webshop did not offer the consumer's preferred delivery option. In addition, the percentage has increased since last year, which indicates that consumers' demands for freedom of choice regarding deliveries have gone up.



Percentage of consumers who have abstained from buying an item online from an e-retailer at some point because they did not offer the consumer's preferred delivery option



Delivery today

Eager Nordic residents want weekend delivery

FREEDOM OF CHOICE REGARDING DELIVERY

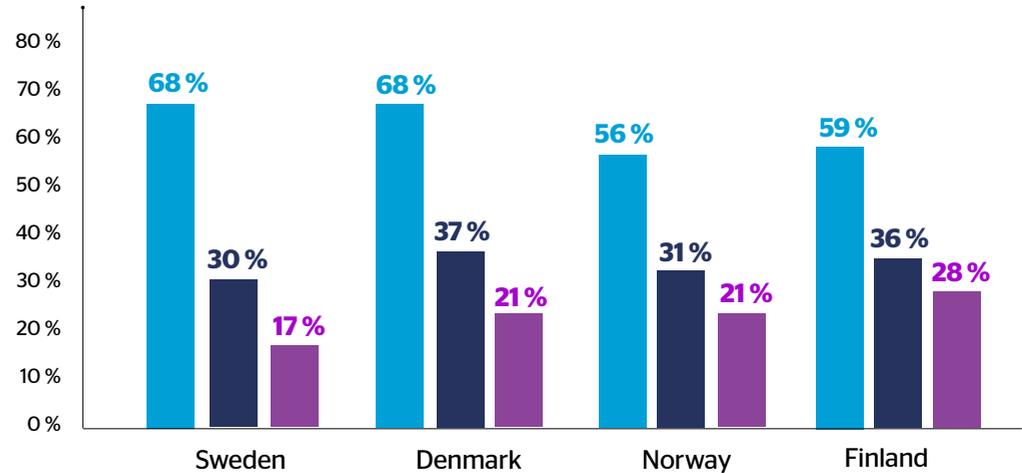
Nordic online consumers are increasingly characterized by impatience and they have many demands related to delivery. Topping the list are accessibility, freedom of choice, convenience and, especially, fast deliveries.

The majority of Nordic e-commerce consumers expect delivery within three days and one third expect the item to be delivered the following business day. Swedish and Danish consumers are the least patient, which is probably a consequence of the fact that domestic webshops have developed their offering faster. Online consumers in Norway and Finland shop from abroad to a greater extent, which makes delivery times longer and lowers expectations for fast delivery.

Many consumers are leaving physical retail for online shopping in hopes of a more convenient and efficient day. However, online consumers who place an order on Friday quickly discover that delivery will not be until the following week. Physical retail therefore has a continued strong grip on weekend sales. Just over one in five Nordic consumers consider weekend deliveries important. A golden opportunity exists here for webshops to increase their sales. By offering weekend delivery, they can capture consumers who do not want to wait for delivery and turn to physical stores instead on the weekend, when they are off work.

Important regarding delivery

(Percentage who rated this as Very important or Quite important)



- That the product can be delivered within three business days
- That the product can be delivered on the next business day
- That the product can be delivered on a Saturday or Sunday

Basis: Purchased goods online in the past 30 days

Delivery today

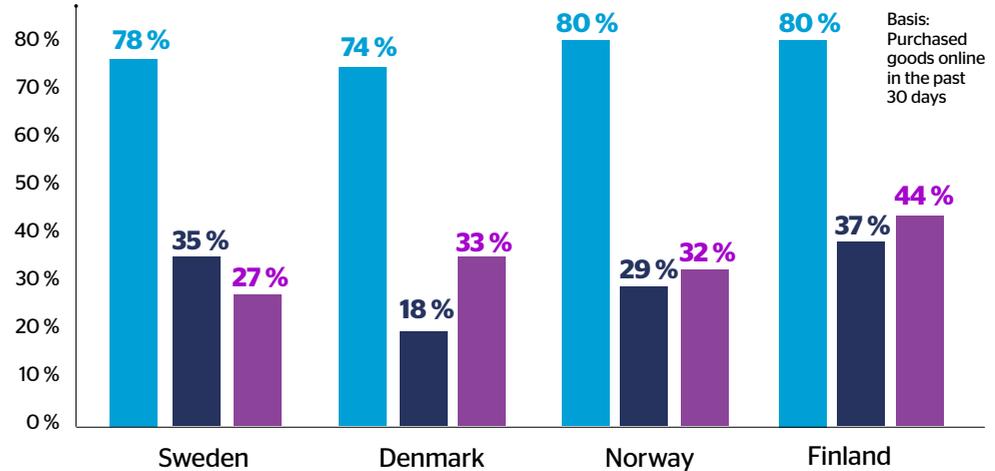
Freedom of choice gilds consumers' lives

FREEDOM OF CHOICE REGARDING DELIVERY

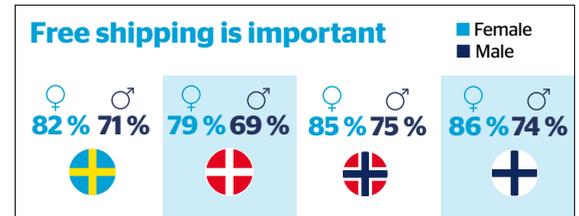
Consumers are used to getting to make choices themselves and do not want additional charges. Advantages like free shipping often build loyalty, while e-retailers must weigh this from of loyalty-creation against the possibility of giving consumers other forms of added value, for example by lowering prices further. More than four in five Nordic e-commerce consumers state that they consider free shipping to be important. Usually, webshops offer free shipping only after consumers spend more than a specified order value. A minority of retail companies state that they always offer free shipping. In all Nordic countries, female e-commerce consumers care more about free shipping than men. This is probably because women buy clothing to a greater extent and free shipping and free returns are especially important for capturing fashion customers.

Consumers' desire for freedom of choice also means a desire for an increasing amount of flexibility with deliveries. Among other things, the opportunity for additional services such as carrying in heavy goods and installations when necessary are in demand. Logistically, it can be a challenge for webshops to offer flexible deliveries, for example when the consumer wants to be able to change the delivery address during the delivery period. For webshops with fast delivery, there is a risk that the parcel has already been sent when consumers realize they want to change the delivery address. The requirement for flexibility thus places demands on webshops with regard to availability, transparency and control over the entire supply chain. The path to profitable deliveries often entails a requirement for updated skills and better IT support, order management systems and inventory.

Important regarding delivery (Percentage that responded "Very important" or "Fairly important")



- That there is free shipping for the goods I have purchased online
- That I have the opportunity to add extra services to my delivery (e.g. carrying in of goods or installation of products)
- That I have the opportunity to change my choice of delivery method during the delivery process (e.g. change delivery address or from home delivery to distribution point)



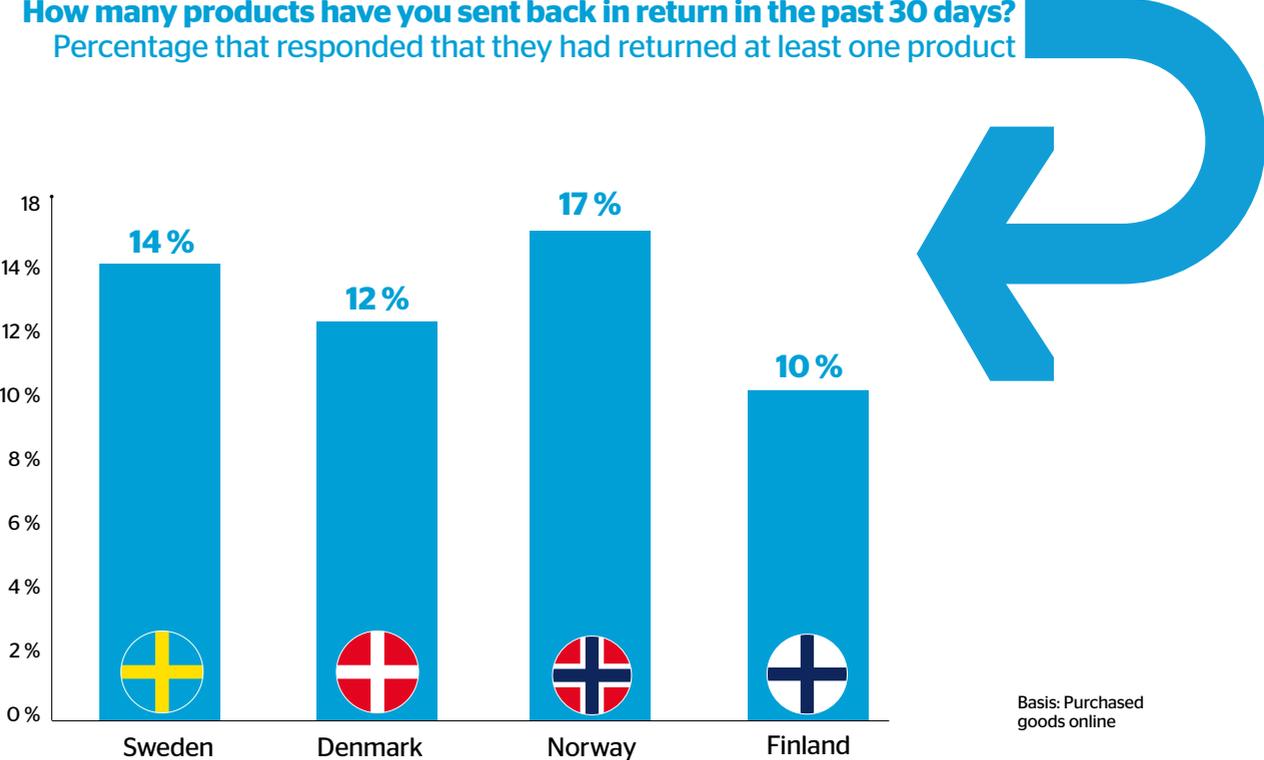
Returns

Just over one in ten online consumers has made a return

Just over one in ten e-commerce consumers state that they have returned at least one item purchased online in the past month. Most have returned one item, but a percentage of consumers state that they have returned more. Norwegian consumers indicated that they have made the most returns during the first six months, followed by Swedish, Danish, and Finnish consumers

Women make more returns than men and young women aged 18-29 years have the highest return rate of all groups. The reason can be found at least in part in the group's consumption pattern. Young women are overrepresented when it comes to fashion purchases, and clothing and shoes are the product categories with the highest return rate. This is because size and fit are still difficult to assess online and may vary between brands.

How many products have you sent back in return in the past 30 days?
Percentage that responded that they had returned at least one product



Basis: Purchased goods online

Delivery information

Communication during the buying journey generates security

In digital retail, good delivery communication is especially important. Because customers do not have the item with them at the time of purchase, they trust that the e-retail company will fulfill its commitments and deliver the product according to their expectations. Holiday gifts must not arrive too late and grocery subscription bags should not appear after guests have gone home.

To avoid surprises, consumers desire clear communication. In Sweden, Denmark and Norway, nearly nine in ten e-commerce consumers state that it is important for delivery status to be communicated continuously. In Finland, it is eight in ten.

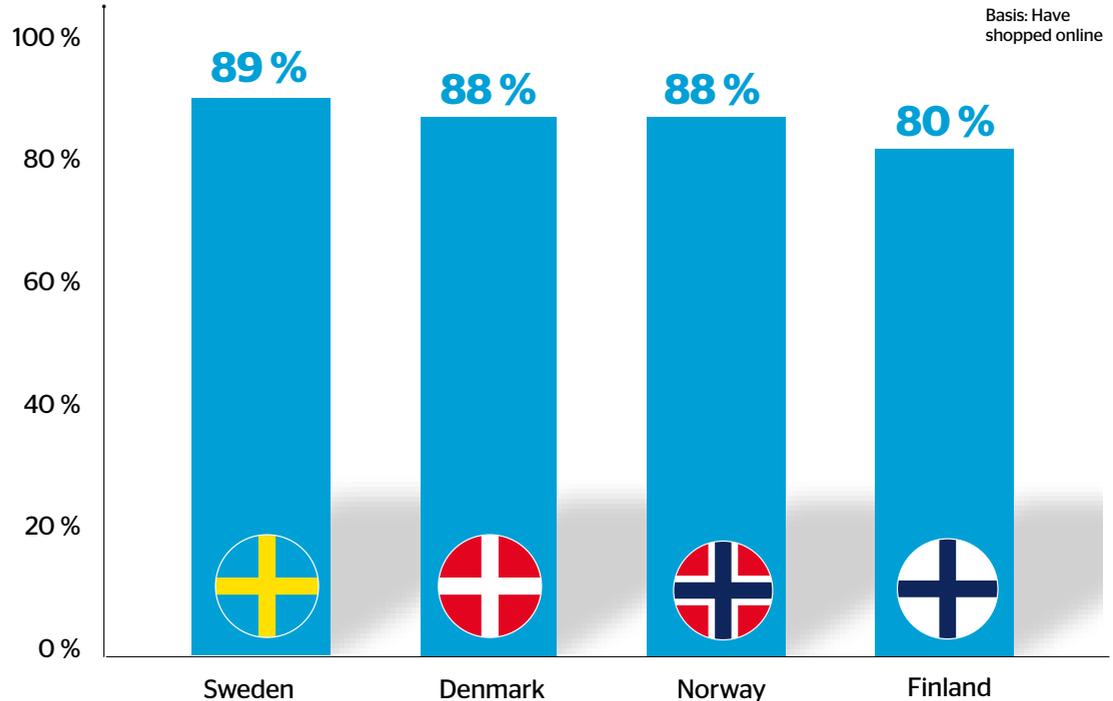
Another aspect is that good communication is central for flexible deliveries. Consumers who are unable to be home to receive the delivery and who want to change the delivery destination on short notice to their workplace or to a distribution point have better opportunities to do so if they know where the parcel is and who is driving it.



Percentage that considers it important for companies to communicate delivery status from order to delivery



Basis: Have shopped online



Platform companies gaining ground

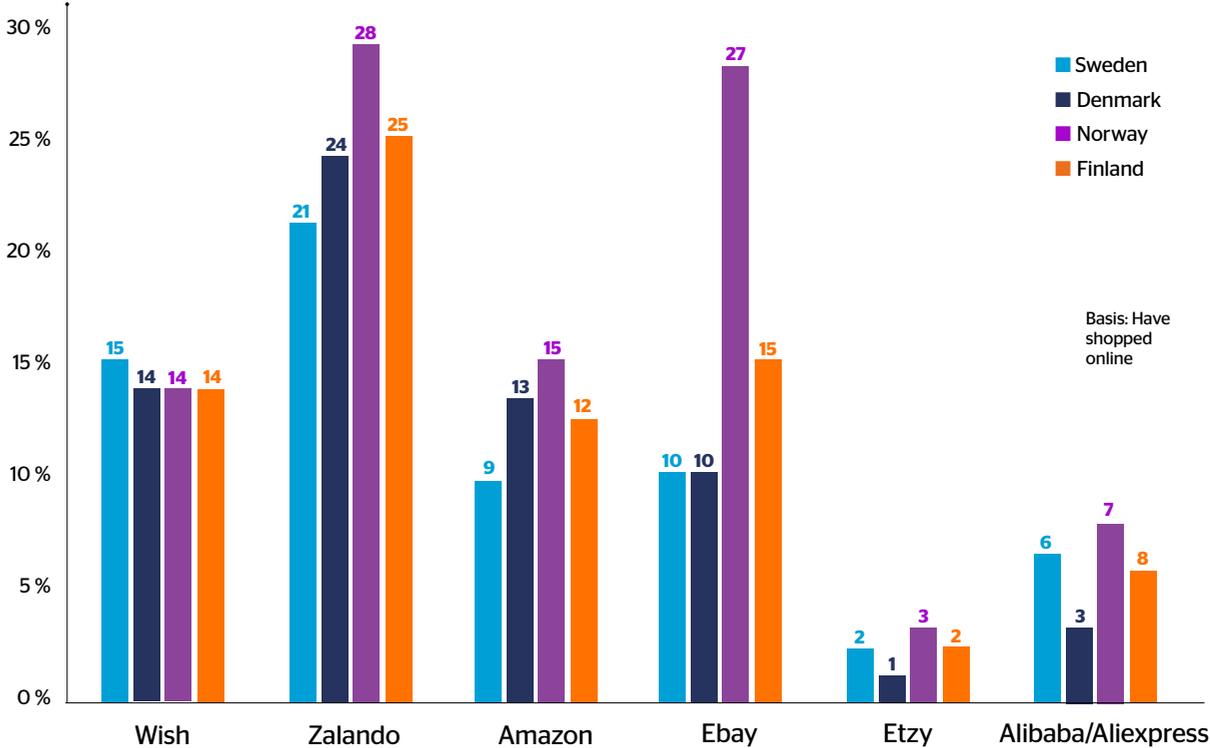
Foreign platform commerce in the Nordic region has grown in recent years. E-commerce consumers state that at some point, they have shopped from Wish, Amazon, Zalando, eBay, Etsy or Alibaba. Norwegian e-commerce consumers shop the most from foreign platform companies - and stand out in particular when it comes to eBay - but the other Nordic countries are not far behind.

When it comes to the Nordic market overall, the German fashion company Zalando appears to have established itself best. Over 20 percent of e-commerce consumers in the Nordic countries states that at some point in the past year, they have shopped from Zalando and in some countries, that figure is nearing 30 percent.

Among e-commerce deliveries from Asia, low-price player Wish has taken the leading position in the Nordic region. Just over 14 percent of Nordic e-commerce consumers state that at some point, they have shopped at Wish, compared with around 6 percent for Alibaba/Aliexpress.

Amazon, which is one of the strongest players globally, does not demonstrate the same position in the Nordic market. Around 12 percent of Nordic consumers stated they have shopped at Amazon during the year.

Which e-commerce page(s) have you used in the past 12 months?



Tomorrow's deliveries

When Nordic consumers get to predict the future's delivery methods, a locked box for deliveries by the home tops most wish lists. The box for deliveries entails increased control and convenience for the recipient. Home delivery is attractive to many people, but entails challenges when no one is home, which many people hope the box for deliveries can remedy. The parcel machine has also increased in attractiveness among consumers compared with last year and it is the second most desired future delivery method. This may be due to the increased flexibility offered by this delivery method. Customers are free to take care of parcel collection themselves with no partner outlet, and can collect their goods when it works for them without having to wait in line at a distribution point. Next to boxes for deliveries of various types, consumers wish for speed. Same-day delivery has gained attractiveness, primarily among Swedes and Finns.

Consumers are still skeptical when it comes to more radical innovations. About one fifth wish for delivery using drones and self-driving vehicles. This relatively low percentage is probably due to the fact that there are no tested systems for these options, while boxes for delivery and parcel machines already exist to some extent today.

Delivery options that challenge the personal sphere are the least desired. Just a few want delivery to the home with a one-time code; the same applies to deliveries to the trunk of the car. Privacy is an important factor in this context. In addition, this type of delivery is dependent on external technology developments such as digital locks, which most consumers do not have today. It can therefore be difficult to imagine how convenient these deliveries could actually be in a future with more favorable conditions.

To what extent would you like to have the following?

Percentage that responded To a very large extent or To a fairly large extent

Same-day delivery



Nordic region	44 %
Sweden	55 %
Denmark	20 %
Norway	30 %
Finland	61 %

Delivery where you are within one hour



Nordic region	29 %
Sweden	35 %
Denmark	14 %
Norway	21 %
Finland	42 %

Delivery to a locked box for deliveries by the home



Nordic region	54 %
Sweden	58 %
Denmark	43 %
Norway	45 %
Finland	62 %

Delivery by drone



Nordic region	21 %
Sweden	23 %
Denmark	15 %
Norway	18 %
Finland	24 %

Delivery to the trunk of your car



Nordic region	14 %
Sweden	13 %
Denmark	8 %
Norway	11 %
Finland	22 %

Delivery to the home with a one-time code



Nordic region	16 %
Sweden	16 %
Denmark	11 %
Norway	17 %
Finland	22 %

Delivery to a parcel machine



Nordic region	47 %
Sweden	36 %
Denmark	51 %
Norway	37 %
Finland	68 %

Delivery using self-driving vehicles



Nordic region	24 %
Sweden	29 %
Denmark	17 %
Norway	21 %
Finland	26 %

För mer information kontakta:

Norden

ARNE ANDERSSON

E-post: arne.b.andersson@postnord.com

Tel: +46 73 079 05 52

Sverige

CARIN BLOM

E-post: carin.blom@postnord.com

Tel: +46 73 030 41 87

PostNords presstelefon

tel. 010-436 10 10