



# E-commerce in the Nordics

Six-month report

**THEME:**  
Consumer-driven logistics



## Consumer power has increased

E-commerce is becoming increasingly common throughout the Nordics, and more online purchases are being made using mobile phones. It is above all the younger generation, who have grown up with computers and digital technology, who are the driving forces in Nordic e-commerce. The younger generation not only shop online the most, these consumers are also driving the actual development of e-commerce.

One fundamental change is that consumers' influence is ever increasing. For successful e-commerce, it will therefore be even more important in the future to be able to offer solutions that are based on customers' requests. In this report we have therefore chosen to focus on the theme of "Consumer-driven logistics".

Consumers clearly demand being able to decide how, where and when they will do their shopping and have their purchases delivered. In other words, delivery has become a natural and integral part of the shopping experience. Consumers want to have some products delivered to a store or distribution point and others delivered directly to their mailbox. Sometimes it is important for them to receive same-day delivery directly to their door.

Fulfilling customers' requests is a business-critical issue for e-commerce, and the winners will be the companies that are most successful in meeting consumers' demands and creating a flexible, efficient purchasing and delivery process.

PostNord closely monitors the development of the e-commerce market. Through our surveys and experience of the Nordic markets we are constantly improving our offer to meet consumers' needs in an innovative and flexible way. We thereby also hope to help create optimal conditions for further growth in e-commerce throughout the Nordics.

### **Håkan Ericsson**

President and Group CEO of PostNord

# About the E-commerce in the Nordics

PostNord has been monitoring the development of e-commerce in the Nordics for the past eight years. As of January 2016, we have been monitoring developments monthly. This provides us with more precise follow-up, but also means that this year's results are not comparable with those of previous years when consumers' habits were monitored quarterly. The part of the survey that applies to the estimated total e-commerce consumption in the Nordics is based on consumers' estimates of how much they have purchased online, both in total and from abroad.

*E-commerce in the Nordics – Six-month report* is based on consumer surveys conducted monthly in Sweden, Denmark, Norway and Finland during the period February to July, inclusive. The number of respondents totaled 45,264.

In this report, e-commerce is defined as the sale of products via the Internet that are delivered to the consumer's home or a distribution point or are collected by the consumer from a store, warehouse or distribution site.

This means that the following are not defined as e-commerce:

- In-store purchases that have first been booked via the Internet
- Sales of services (for example, travel, hotel accommodation and concert tickets) via the Internet
- Business-to-business online sales
- Online sales between individuals

The consumer surveys were conducted in with a representative national selection of the population aged 18–79 in each country. The surveys were conducted with the help of TNS SIFO's online panel on six different occasions during the period February–July 2016. In all, 9,797 respondents took part in Sweden, 10,170 in Denmark, 10,318 in Norway and 14,979 in Finland.

Because the results are obtained using an online survey, the findings are representative for the percentage of the population who have access to the Internet. In cases where estimates have been presented as applying to the population as a whole, the findings were adjusted to reflect the degree of Internet penetration in the particular market.

## E-COMMERCE DEVELOPMENT

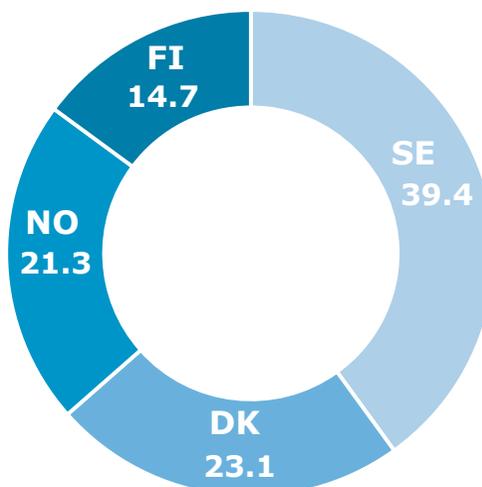
# Nordic e-commerce worth SEK 98.4 billion during the first half of 2016

### E-COMMERCE CONSUMPTION IN THE NORDICS

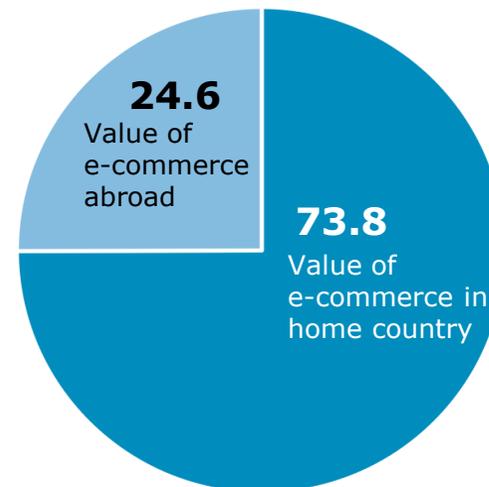
E-commerce in the Nordics is an industry worth billions of Swedish kronor. In the first half of 2016 domestic online stores, foreign e-tailers and e-tailers that count the entire Nordic region as their domestic market competed in a market where consumers' estimated consumption amounted to SEK 98.4 billion. On average, three quarters of consumption goes to national e-tailers in each country, but the distribution between the countries is worth noticing. Swedes shop more extensively from national companies, while Finland has the highest proportion of consumption abroad.

Due to changes in the measurement methods – from quarterly surveys to monthly surveys – the results for 2016 are not comparable to those of previous years.

### The value of Nordic consumers' e-commerce during the first half of 2016 (SEK billion)



### The value of Nordic consumers' e-commerce in their respective home countries and abroad (SEK billion)



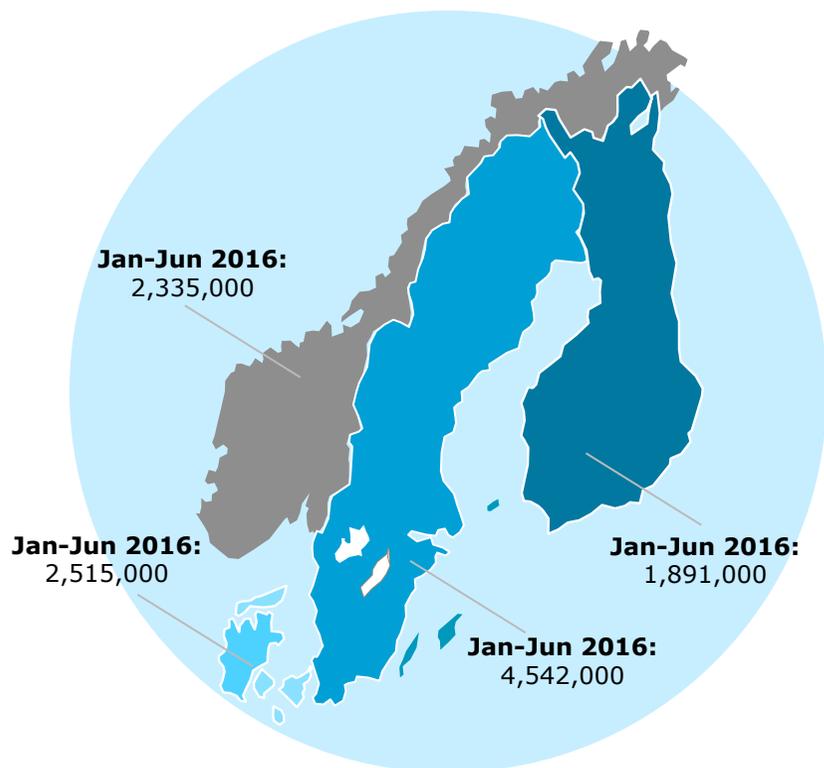
*Calculated based on the average answer of the respondents in each country to the question, "How much do you estimate that you have spent on buying products online in the past month?" (Base: Have shopped online in the past month)*

*\* E-commerce in home countries is based on consumers' estimates of how much they have spent on online shopping in total during the period, less the amount that they estimate having spent on online shopping from foreign websites*

## E-COMMERCE DEVELOPMENT

# Swedes shop online most in the Nordics

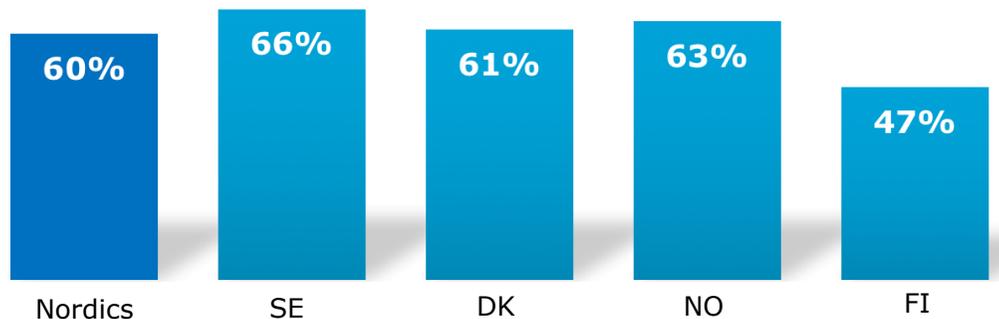
### CONSUMERS WHO HAVE SHOPPED ONLINE



Six out of ten people in the Nordic region shopped online in the first six months of 2016. On average 11,283,000 residents of the Nordics shopped each month. The largest proportion of online shoppers live in Sweden, where e-commerce has reached a significant degree of maturity with well-established operators, effective competition and well-developed infrastructure to handle the logistics. Denmark and Norway are not far behind in terms of the proportion of consumers who have shopped online.

Finland has a high rate of growth, but there is considerable variation between industries, and Finnish consumers shop online less frequently than consumers in the other Nordic countries do. Swedes and Danes shop online far more often than Norwegians and Finns. Men and women shop to the same extent in all the countries.

### Proportion of consumers who have shopped online



## E-COMMERCE DEVELOPMENT

# The young are leading the growth

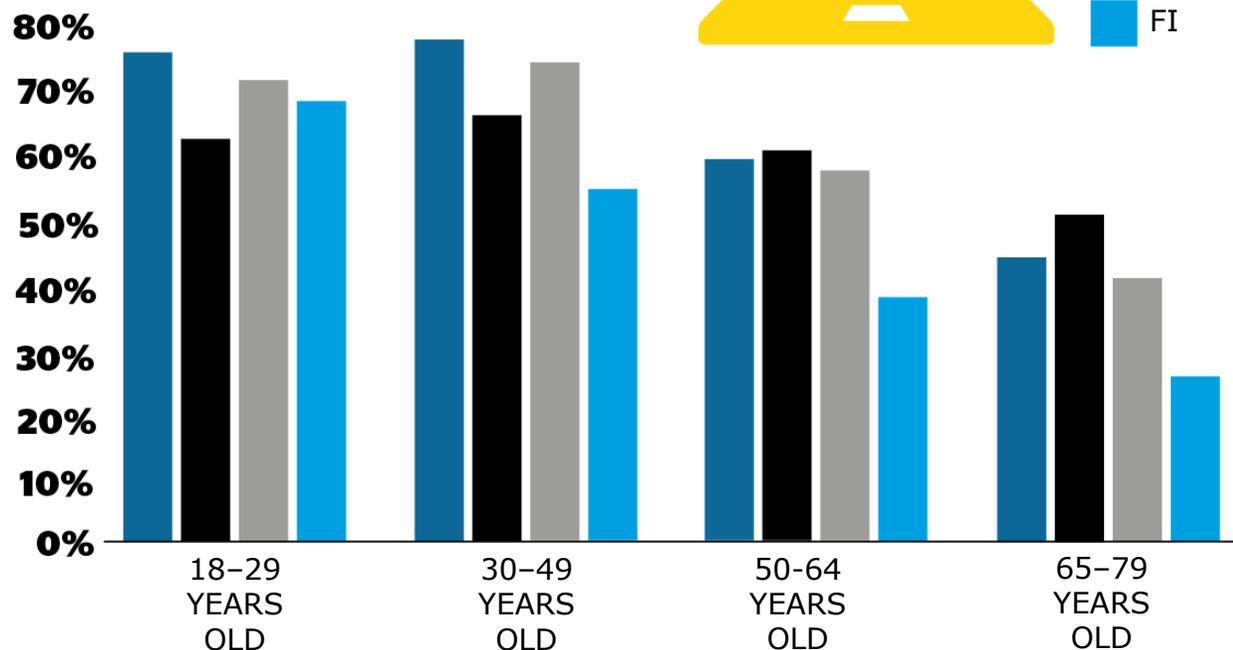
### CLEAR AGE PATTERNS

Young consumers constitute the driving force in Nordic e-commerce. Those who have grown up with a computer, who have assimilated all the advantages of tablet computers and smartphones, who have not become rooted in physical habits and who have instead become accustomed to the abundance of possibilities offered online.

In Sweden, Denmark and Norway online shopping is indisputably most common among inhabitants under the age of 50. The 18–29 age range contains the consumers who use the Internet as their second living room. The 30–49 age group contains the consumers who are in the midst of their careers and have children, and who therefore regard e-commerce as an opportunity to use their time and energy more efficiently.

The pattern partly differs in Finland. Here, people aged 18–29 are the most frequent visitors to online stores. This is followed by a steeply declining curve in that each age group buys less and less. Only one in four Finns over the age of 65 have shopped online. E-tailers in Finland still have some work to do in building consumers' trust in online shopping.

Have you bought products online in the past month? (YES)



Refers to average per month (January–June)  
Base: The entire population

## E-COMMERCE DEVELOPMENT

# Clothing and footwear top the product list

### FAMILIAR LIST OF MOST POPULAR PRODUCTS

The products bought the most online are clothing and footwear, followed by media products and home electronics. The patterns are the same throughout the Nordics.

It is notable that online groceries shopping is more common in Denmark than in the other Nordic countries. The industry was quick to offer home delivery of groceries and other consumables, and this category is growing rapidly. Denmark has a long tradition of home delivery in general, which has probably made it easier for consumers to accept that they can't examine fresh produce before buying it.

In Sweden it is much more common than in the other Nordic countries to buy products linked to health and beauty. The cosmetics industry in Sweden has long been well established and has many driven players. Furthermore, the Swedish pharmacy trade is somewhat of a pioneer on the Internet, in the form of major specialized online operators and traditional physical operators who have established an online presence in recent years. In a short space of time, consumers have assimilated greater accessibility of pharmacy products, often with home delivery.

### What types of products have you bought online in the past month?

Base: Have shopped online in the past month	Nordics	Sweden	Denmark	Norway	Finland
Clothing/footwear	31%	33%	29%	27%	32%
Media*	26%	29%	22%	27%	28%
Home electronics**	21%	21%	21%	19%	24%
Health/beauty	19%	25%	15%	18%	13%
Sports/leisure	10%	9%	10%	13%	11%
Car/boat/motorcycle accessories	6%	6%	4%	6%	7%
Children's items/toys	6%	8%	7%	6%	4%
Groceries	5%	5%	8%	5%	4%

\* Includes products such as books, CDs and films.

\*\* Includes products such as computers and computer accessories, mobile phones and audio visual products.

All figures refer to average per month (January–June)

## E-COMMERCE DEVELOPMENT

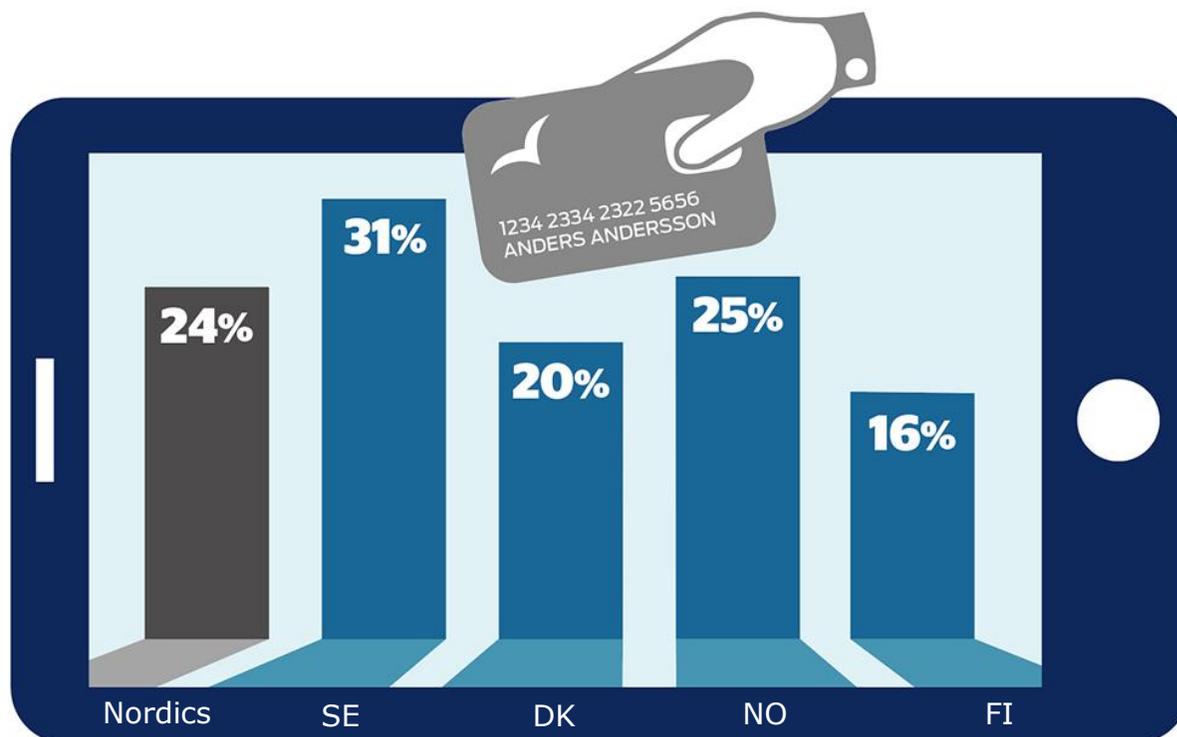
# One in four shop using their mobile phones

### SWEDEN HAS HIGHEST CONCENTRATION OF MOBILE PHONES

One in four consumers in the Nordics use their mobile phone to shop online. The differences between the countries and also between age groups are, however, considerable. For example, Swedes' online shopping using mobile phones is double that of Finns. In general it is evident that consumers aged 18–49 shop much more often than older consumers do. Shopping using mobiles is least common in Finland, but the proportion may be expected to increase in parallel with Finnish online stores developing responsive websites. This is a development that has rapidly picked up speed since Google introduced the policy of prioritizing responsive webpages in search results.

The popularity of mobile phones as a purchasing channel has grown over a long period of time, largely as it is the digital device that is usually closest to hand. The attractiveness of mobile phones will probably increase as more players develop tailored experiences for small screens.

Have you at any time during the past month purchased one or more products using your mobile phone? (YES)



Base: Have shopped online in the past month

## E-COMMERCE DEVELOPMENT

# Danes buy groceries via their mobiles

### CLOTHING AND FOOTWEAR TOP THE LIST

Clothing and footwear hold an unchallenged first place on the list of products bought using mobile phones – mainly driven by consumers in Finland and Sweden. The industry has a high level of e-commerce maturity and has come far in producing mobile websites on which consumers can obtain the same service as on their computers, such as video, size guides and detailed product information. The industry also has a long history of traditional mail order trade, which has made it easier for customers to get used to e-commerce than in other industries.

In Denmark online purchases of media products are markedly less common than in the rest of the Nordics. Instead, a significantly higher number of Danes buy groceries using their mobiles, which contributes to strong growth for this industry. Sweden stands out in the health and beauty sector with players that have developed attractive and practical websites, irrespective of what kind of screen consumers use.

### What types of products have you bought online using a mobile phone in the past month?

Base: Have shopped online using a mobile phone	Nordics	Sweden	Denmark	Norway	Finland
Clothing/footwear	30%	35%	25%	20%	34%
Home electronics*	20%	23%	15%	15%	25%
Media**	19%	30%	7%	16%	16%
Health/beauty	17%	27%	10%	17%	6%
Sports/leisure	8%	9%	6%	10%	6%
Children's items/toys	8%	9%	11%	6%	4%
Car/boat/motorcycle accessories	6%	7%	6%	4%	8%
Groceries	6%	4%	14%	4%	5%

\* Includes products such as computers and computer accessories, mobile phones and audio visual products.

\*\* Includes products such as books, CDs and films.

## E-COMMERCE DEVELOPMENT

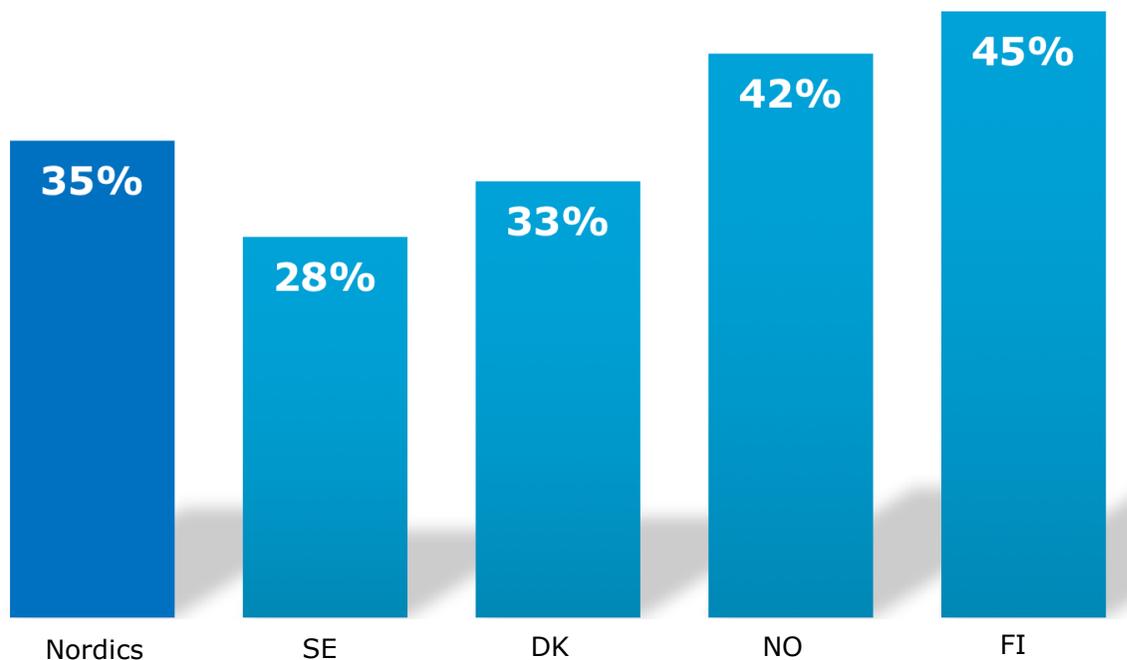
# High proportion of international trade in Finland

### E-COMMERCE FROM ABROAD

E-commerce has made it significantly easier for individual consumers to find a larger and often also cheaper range of products than in their home countries. In the first half of 2016 a third of Nordic consumers stated that they had shopped online from abroad.

By studying the Nordic countries' purchases from abroad we can see roughly how strong national commerce is in the various countries. Sweden has the lowest proportion of purchases from abroad, which is a consequence of having many well-developed national e-tailers over a wide spectrum of industries. Norwegian and Finnish consumers still need to rely on foreign players to cater for all their needs online.

### Have you bought products online from abroad at any time in the past month? (YES)



*Refers to average per month (January-June)  
Base: Have shopped online*

## E-COMMERCE DEVELOPMENT

# Most shop from the UK

### E-COMMERCE FROM ABROAD

Global online commerce attracts many Nordic consumers. During the first six months of 2016 the UK and China were the most popular countries to buy from. The UK has clothing retailers with distinctive product ranges, as well as Amazon with its enormous range of media products. In addition, the British pound has fallen by more than two Swedish kronor since November 2015.

China is a popular country to buy from, mainly thanks to its cheap home electronics. Consumers are also attracted by clothing at low prices and low shipping costs. In the past year, however, the Chinese yuan has strengthened against the Swedish krona. It remains to be seen whether this will spur consumers to transfer their consumption of low-price products to other Asian countries.



### From which countries have you bought products online in the past month? Top 5:

Base: Have shopped online from abroad	Sweden	Denmark	Norway	Finland
United Kingdom	<b>30%</b>	<b>34%</b>	27%	21%
Germany	21%	26%	10%	<b>26%</b>
USA	18%	14%	27%	14%
China	29%	22%	<b>30%</b>	23%
Denmark	7%			
Sweden		11%	13%	19%

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

### In the Nordics

Base: Have shopped online from abroad	Sweden	Denmark	Norway	Finland
Shopped from Sweden		<b>11%</b>	<b>13%</b>	<b>19%</b>
Shopped from Denmark	<b>7%</b>		9%	3%
Shopped from Norway	1%	1%		2%
Shopped from Finland	0%	1%	1%	

A blocked field means that the response option is not applicable.

## E-COMMERCE DEVELOPMENT

# Popular to order clothing and footwear

### E-COMMERCE FROM ABROAD

Clothing and footwear are the most popular products that consumers in the Nordics buy online from abroad. This is a natural consequence of the fact that some of the largest e-tailers in Europe sell clothing.

In Denmark, Norway and Finland, it is equally common to buy media products such as home electronics online, while consumers in Sweden rely less on foreign companies for home electronics. In Sweden there are many different players with a very detailed range of products, which makes the need to shop from abroad more of an issue of price rather than a quest for a wider product range.



### What types of products have you bought online from abroad in the past month? (average January–June)

Base: Have shopped online from abroad	Nordics	Sweden	Denmark	Norway	Finland
Clothing/footwear	27%	28%	25%	23%	34%
Media*	19%	19%	18%	18%	23%
Home electronics**	15%	12%	19%	17%	17%
Car/boat/motorcycle accessories	10%	8%	10%	15%	11%
Children's items/toys	9%	9%	10%	9%	10%
Health/beauty	8%	9%	5%	8%	9%
Sports/leisure	5%	7%	4%	5%	4%
Groceries	2%	1%	3%	3%	3%

\* Includes products such as books, CDs and films.

\*\* Includes products such as computers and computer accessories, mobile phones and audio visual products.

**THEME:**

# Consumer-driven logistics



## DELIVERY TODAY

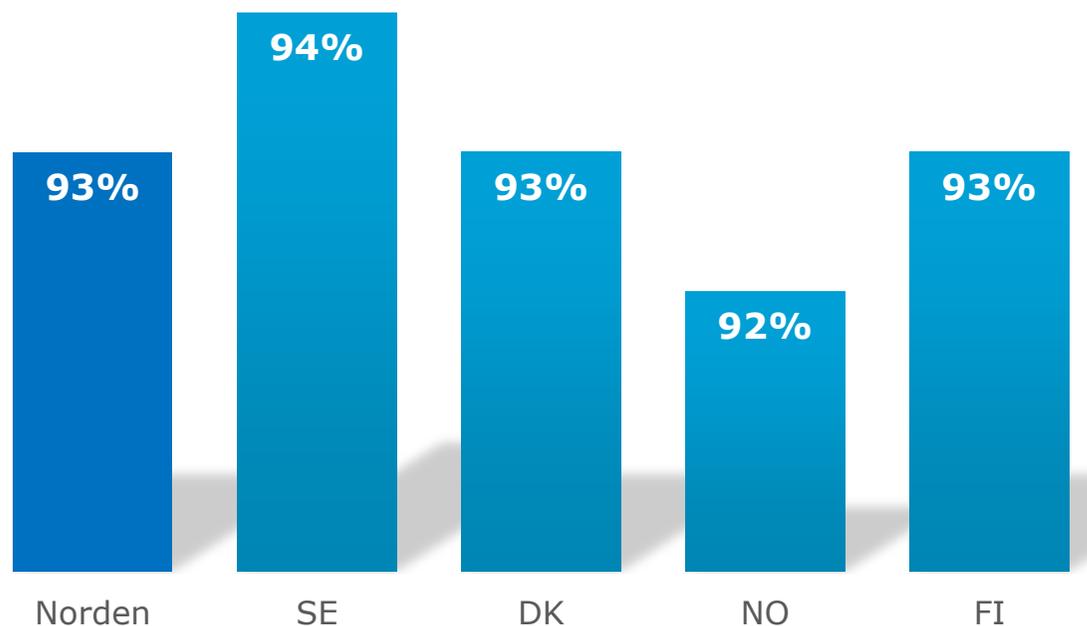
# High level of customer satisfaction in all the Nordic countries

### FREEDOM OF CHOICE IN DELIVERY

E-tailers and logistics operators have made an effort to produce flexible delivery solutions, which has proved worthwhile. Customer satisfaction regarding deliveries is very high in all Nordic countries. More than nine out of ten Nordic online shoppers are satisfied with their most recent online purchase.

In Norway and Finland consumers are equally satisfied irrespective of age. In both Sweden and Denmark, young consumers tend to be more particular about deliveries than older consumers. E-tailers who deliver to Sweden and Denmark should therefore be aware that young people demand more from deliveries. These consumers shop online more frequently and have acquired a clear frame of reference for their ideal delivery. They have clear expectations of aspects such as delivery time, delivery method and what information and service they want during the delivery process.

Think back to the product(s) you purchased most recently online. How satisfied were you with the delivery?  
(Proportion very satisfied and quite satisfied)



Base: Have shopped online

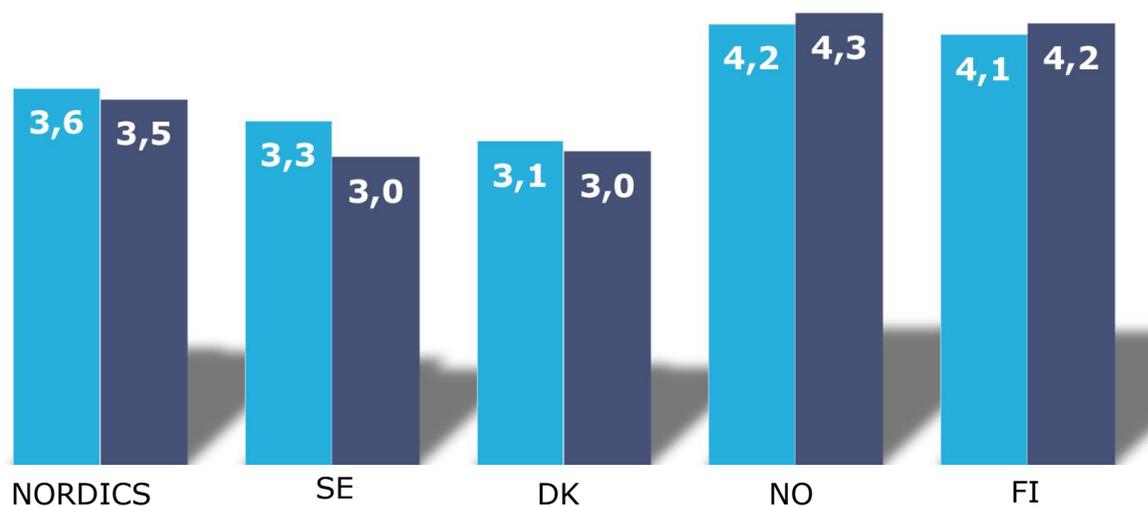
## DELIVERY TODAY

# Delivery times meet expectations

### VARIOUS DELIVERY SPEEDS

Online shoppers are rarely prepared to wait very long for their purchases. E-tailers and logistics operators have set clear goals to meet customers' requests. Creating customer satisfaction minimizes the risk of customers choosing to shop in physical stores instead or buy from a different e-tailer.

In all the countries, the average delivery time largely meets consumers' expectations. Swedes and Danes expect – and receive – the fastest deliveries. In Norway and Finland consumers turn to e-tailers abroad to a much greater extent. This is probably why both delivery times and expectations are about one day longer.



-  What was your expectation of the delivery time, i.e. what was the maximum number of days you were prepared to wait for the product?
-  How long did it take from when you placed your order until your product was delivered?

## DELIVERY TODAY

# Most common option is collection from service points

## DELIVERY METHODS

The most common delivery method by far of products to Nordic online shoppers is collection from a distribution point. On average, four out of ten Nordic e-commerce deliveries take place via a distribution point. However, the national differences are significant. In Sweden there is a strong tradition of using service points, which makes this delivery method nearly three times more popular than in Finland. Finns are ahead in terms of deliveries to parcel machines instead.

Home delivery is a service at a low level of maturity in most of the Nordic countries. The most progress with this method has been made in Denmark, where there is a longer tradition of home deliveries. Furthermore compared to the other countries, in Denmark there are greater opportunities for home deliveries without the recipient needing to sign for them. Saturday deliveries have also become popular because it is when many consumers are at home and can therefore receive their products.

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

Base: Have shopped online	Nordics	Sweden	Denmark	Norway	Finland
I collected it myself from a service point.	42%	60%	32%	40%	22%
It was delivered to my mailbox/multi-occupancy mailbox	24%	22%	18%	35%	24%
It was delivered to my home and left outside my door (without me needing to sign to confirm receipt of the product)	6%	5%	12%	3%	6%
It was delivered to my home in daytime (not in my mailbox/multi-occupancy mailbox) and I had to sign to confirm receipt of the product	6%	4%	12%	3%	8%
I collected it myself from a parcel machine	5%	0%	9%	1%	15%
I collected it myself from the online store's physical stores or warehouse	4%	3%	3%	4%	6%
It was delivered to my workplace	2%	1%	4%	1%	1%
It was delivered to my home in the evening (not in my mailbox/multi-occupancy mailbox) and I had to sign to confirm receipt of the product	1%	1%	1%	2%	2%

## CONSUMER POWER IN DELIVERIES

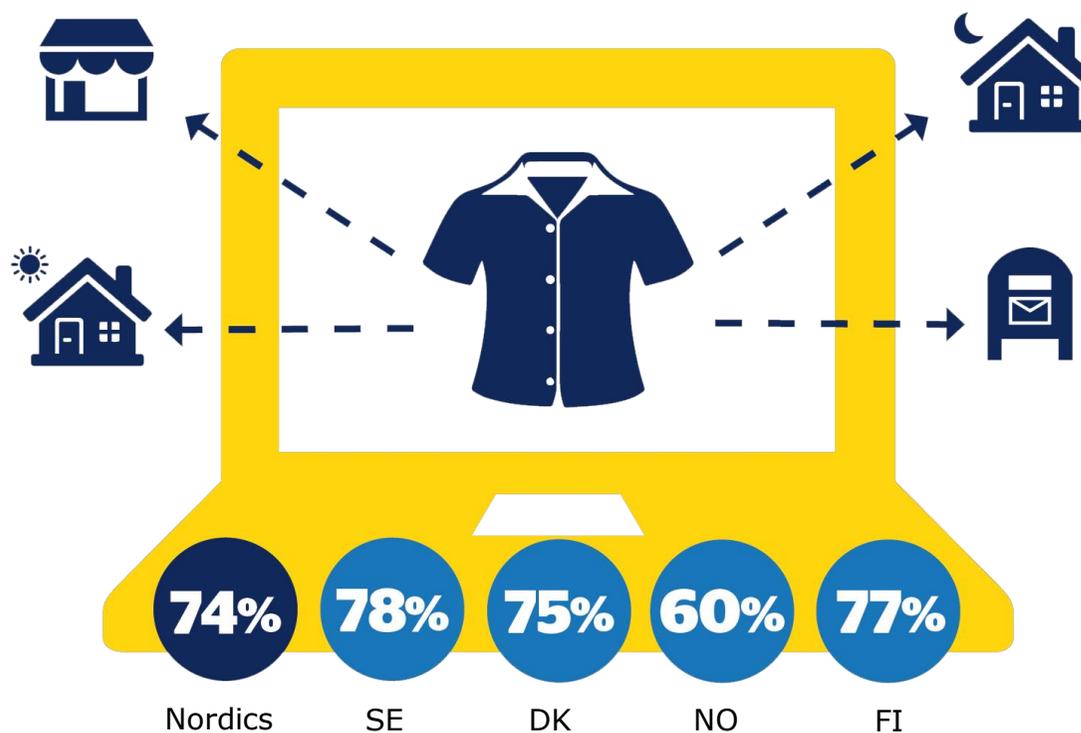
# Important to provide several choices

### FREEDOM OF CHOICE IN DELIVERY

Freedom of choice regarding deliveries is very significant when residents of the Nordic countries shop online. Three out of four Nordic online shoppers think that it is important to be able to choose how a product is delivered. It is therefore of utmost importance for e-tailers to be able to offer several different methods for customers to choose from.

Each customer has many potential preferences regarding how a product is delivered. For some, a delivery close to their workplace is the most convenient option, whereas others prefer a service point close to their home. In the incredibly tough e-commerce competition, e-tailers that simplify everyday life for consumers will be rewarded.

How important is it to you to be able to choose how to have a product delivered when you order it online?  
(Proportion very important and quite important)



Base: Have shopped online

## CONSUMER POWER IN DELIVERIES

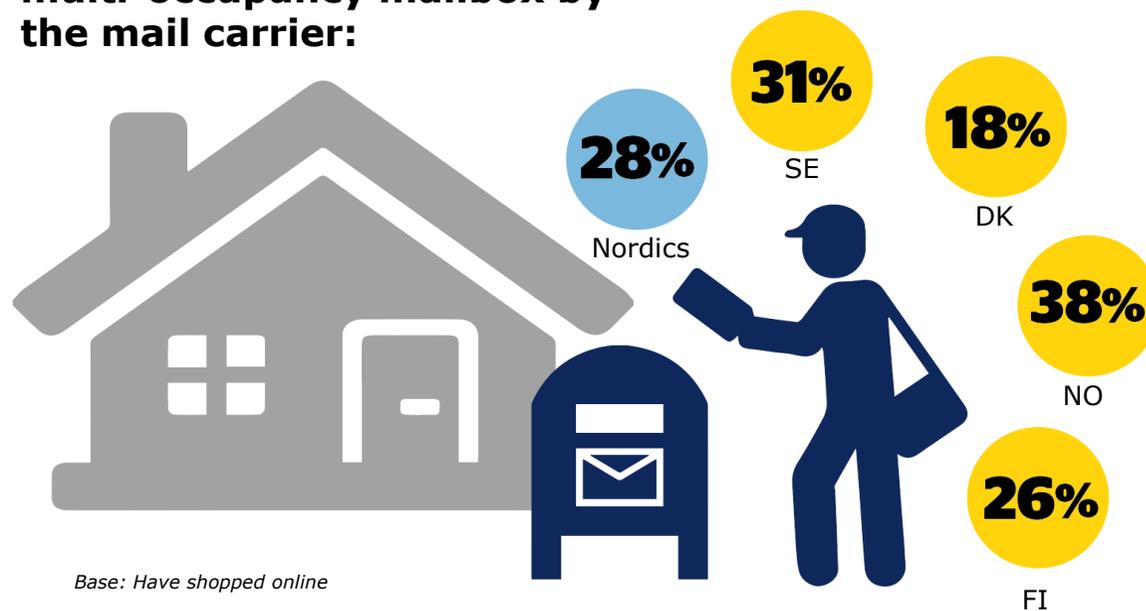
# Mailbox most in demand

### REQUESTED DELIVERY METHODS

Customary practices, laws and regulations, various demographic conditions and the range of options actually offered by logistics operators account for the sizable differences between the Nordic countries concerning the delivery methods most in demand.

Think back to your most recent purchase of a product/products online. What would your preferred delivery method have been if you had been able to choose one of the following options?

**Delivered to my mailbox/  
multi-occupancy mailbox by  
the mail carrier:**



## Think back to your most recent purchase of a product/products online. What would your preferred delivery method have been if you had been able to choose one of the following options?

### REQUESTED DELIVERY METHODS

Swedes prefer to collect their products from a service point. Finns want to collect their purchases from parcel machines that are accessible 24/7 – a system that has grown in Finland in recent years and has become increasingly common. In Norway mailboxes are the the most popular choice by far, while in Denmark there is strong growth in the popularity – and opportunity – of having home deliveries. Here e-tailers have opportunities to gain competitive advantages by carefully adapting to each specific country.

Base: Have shopped online	Nordics	Sweden	Denmark	Norway	Finland
Delivered to my mailbox/multi-occupancy mailbox by the mail carrier	<b>28%</b>	<b>31%</b>	<b>18%</b>	<b>38%</b>	<b>26%</b>
Collect it myself from a service point (for PostNord, DHL or Schenker)	26%	37%	19%	22%	16%
Home delivery in the evening (I am at home and sign to confirm receipt of the product)	9%	10%	9%	9%	9%
Delivered and left outside my door (if it does not fit into my mailbox/multi-occupancy mailbox) and I as the recipient then take over responsibility for the product	9%	8%	18%	8%	2%
Collect it myself from a parcel machine that is accessible 24/7	8%	2%	9%	6%	19%
Home delivery in daytime (I am at home and sign to confirm receipt of the product)	5%	4%	7%	1%	9%
Collect it myself from the online store's physical stores or warehouse	2%	1%	2%	2%	4%
Delivery to my workplace	2%	2%	4%	2%	1%

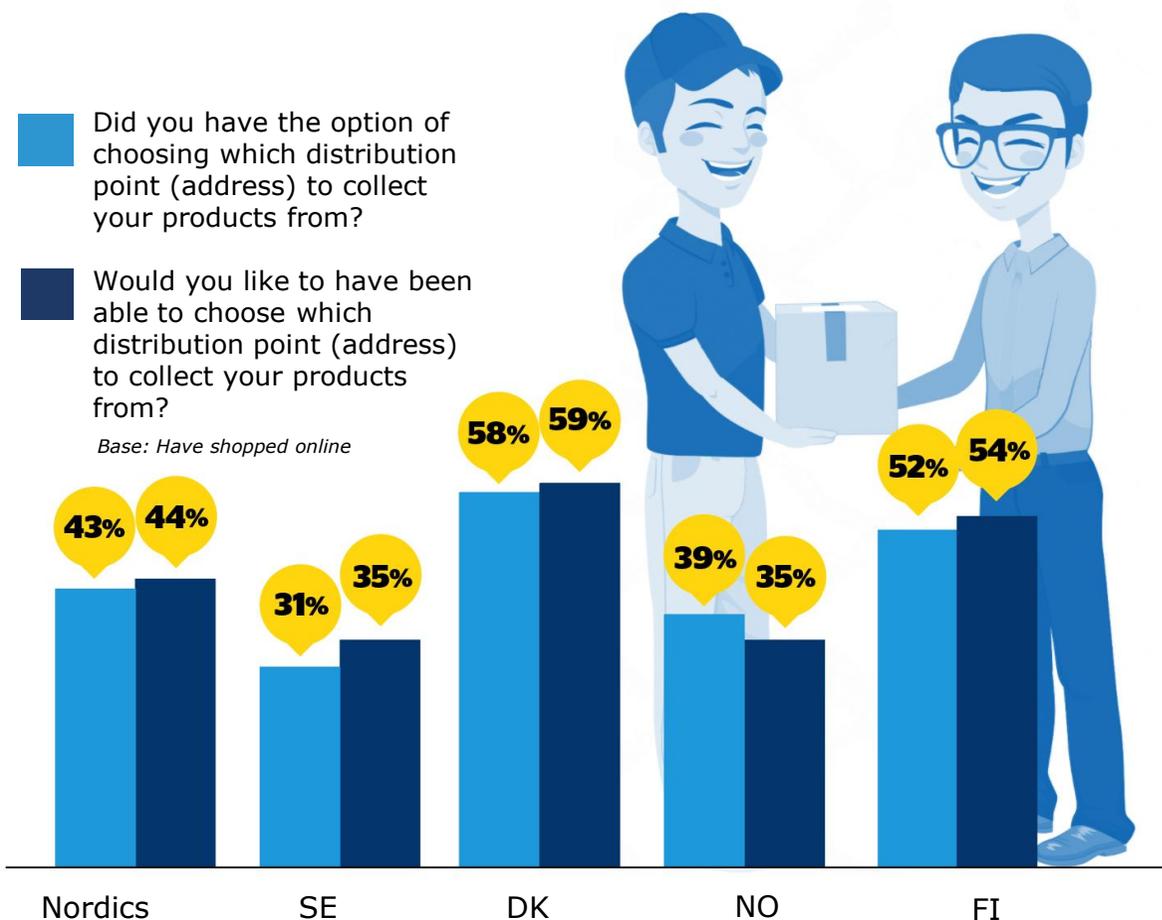
## CONSUMER POWER IN DELIVERIES

# Important to choose distribution point

### FREEDOM OF CHOICE IN DELIVERY

Four out of ten Nordic online shoppers want to be able to choose which distribution point their products will be delivered to. Freedom of choice regarding distribution points varies in the Nordics. For example, six out of ten Danish online shoppers had the option of choosing a distribution point when they made their latest online purchase, while only half that number of Swedish online shoppers had such an option.

If we compare these figures to the number of consumers who actually think that it is important to be able to choose a delivery method, we can see that freedom of choice needs to increase even more. Inadequate freedom of choice probably leads to consumers opting to buy from a different online store than they first intended to.



## CONSUMER POWER IN DELIVERIES

# The delivery should be fast and cheap

### FREEDOM OF CHOICE IN DELIVERY

Nordic online shoppers are very clear about what they rate as most important in terms of deliveries. Winners among online stores will be those who can offer fast, cheap deliveries.

However, often the costs and delivery time are mutually dependent in such a way that rapid deliveries tend to cost more. To obtain as many satisfied customers as possible, it is a good idea to offer several options so that each consumer can weigh up the delivery costs and delivery times.

Think back to your most recent purchase of a product/products online. Which of the options below was the most important or would have been the most important if you had been able to choose a delivery method for your product?

Base: Have shopped online	Nordics	Sweden	Denmark	Norway	Finland
That the product was delivered as cheaply as possible.	35%	37%	33%	32%	38%
That the product was delivered as quickly as possible.	22%	23%	23%	24%	15%
That the product was delivered directly to my mailbox at home.	11%	12%	11%	12%	10%
That the product was delivered to a service point near me (e.g. a partner outlet, physical store or warehouse)	11%	12%	9%	11%	12%
That the product was delivered directly to me at home at a time of my choice	8%	8%	8%	9%	8%
That the product was delivered to a service point of my choice (e.g. a partner outlet, physical store or similar)	7%	6%	8%	5%	8%

## CONSUMER POWER IN DELIVERIES

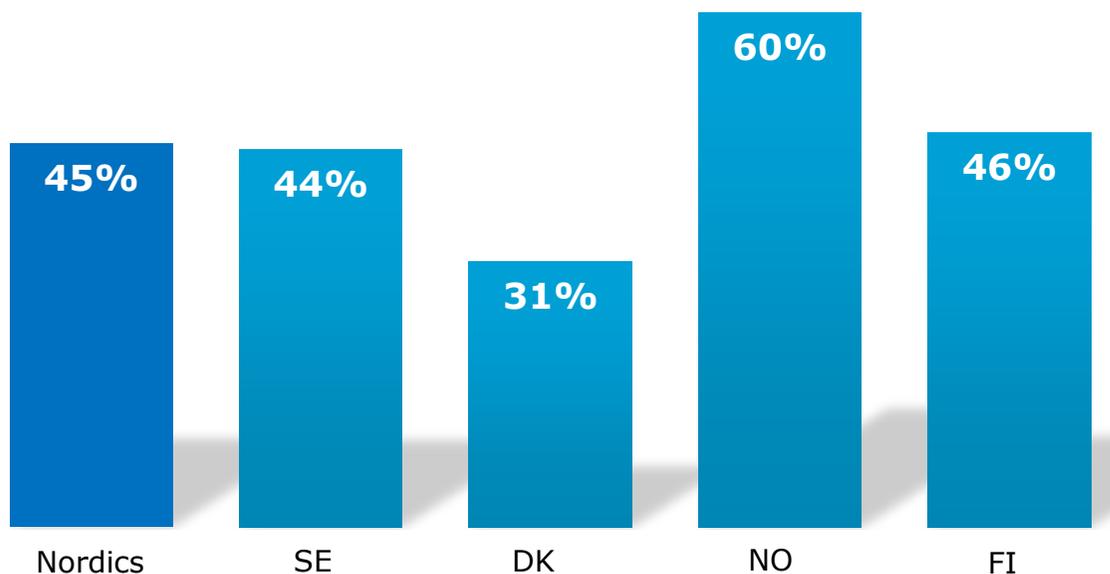
# Half are prepared to pay extra for home delivery

### FREEDOM OF CHOICE IN DELIVERY

Nearly half of Nordic online shoppers would consider paying extra for home delivery. They are not, however, prepared to pay a large amount for such a service. Most would consider paying a maximum of SEK 50. Consumers aged 18–29 are most willing to pay extra for home delivery. This perhaps forecasts a movement towards additional paid home deliveries in the future when the e-commerce market becomes matures further and even more young people with similar preferences enter the market.

Norwegians are most willing to pay extra for home delivery and are also those who are most willing to pay a higher amount. In Denmark free home delivery is already common, which is probably why the Danes' willingness to pay is the lowest in the Nordics.

Think back to your most recent purchase of a product/products online. Would you have been prepared to pay to have the product delivered to your home? (YES)



Base: Have shopped online

## PROCESSING RETURNS

# Finland largest in Nordics regarding returns

### YOUNG PEOPLE RETURN PRODUCTS THE MOST

Nordic online shoppers return one in ten items that they have ordered. Most consumers who have returned a product in the past month have sent back one or two items.

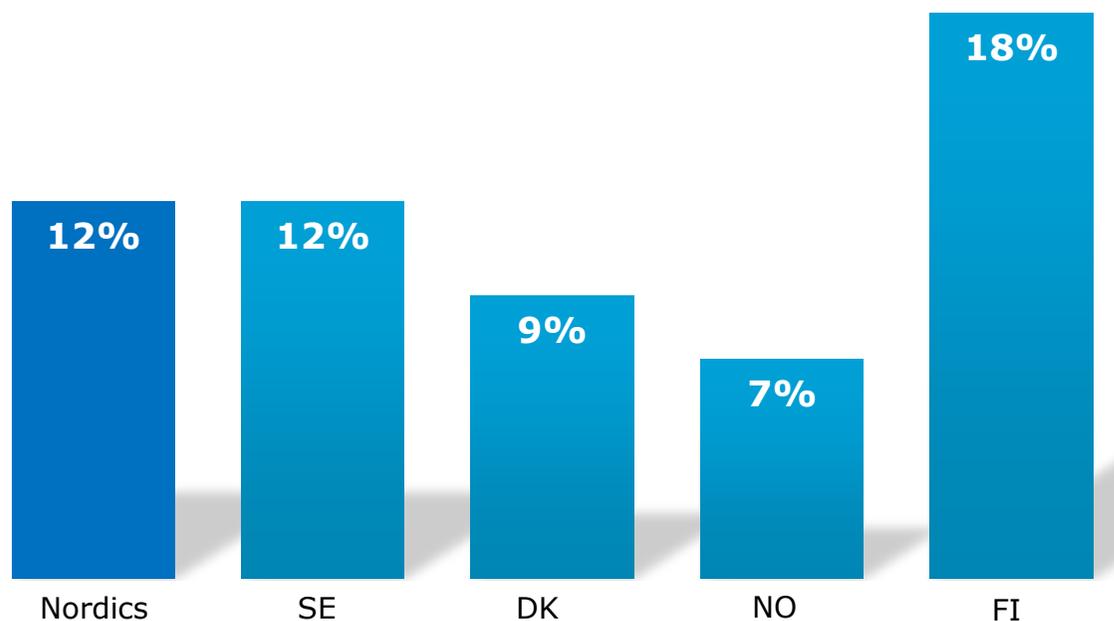
It is interesting that Finnish consumers return nearly one in five products, despite buying a great deal from abroad. The reason for this is probably that they buy many fashion items and because returns have been simplified seeing as they can be placed in parcel machines, which are common in Finland.

It is also notable that young consumers tend to return products the most. This is probably as these consumers buy the most clothing and footwear online and often order items to try them on for size and fit.

For e-tailers, a high rate of returns is costly in the short term and reduces profitability. On the other hand, a generous returns policy may increase customer loyalty and therefore contribute to higher profitability in the longer term.

### How many products that you have bought online in the past month have you returned?

(Proportion who responded that they had returned at least one product)



Base: Have shopped online

## PROCESSING RETURNS

# Nordic returns procedures are effective

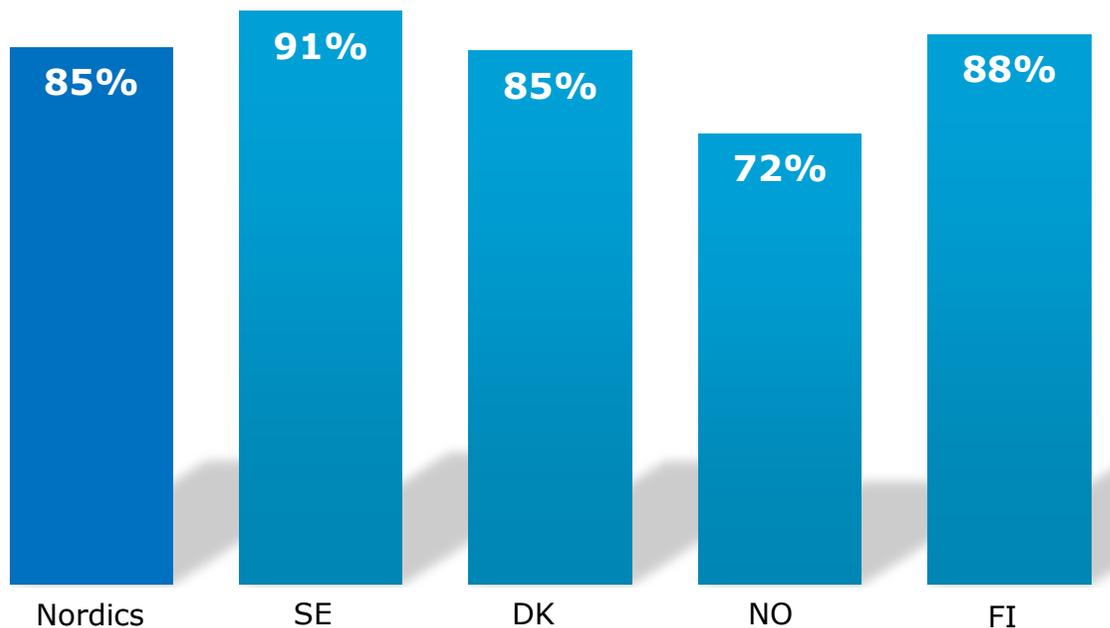
### HIGH LEVEL OF SATISFACTION WITH RETURNS

In the countries with the highest number of returns, Sweden and Finland, consumers also rate the returns procedures most highly. In Denmark and Norway, however, the degree of returns is lower, and consumers are less satisfied with the returns procedures.

The explanation is probably twofold. The consumers who often return products learn how to use the procedure and think that it works better over time. It can also be assumed that the better the procedures for processing returns in a country, the greater the number of consumers who choose to return products.



**In general how do you rate the procedures for returning products that you have bought online ?** (Proportion who responded very good and good) Base: Have returned a product



Base: Have shopped online

## CONSUMER POWER IN DELIVERIES

# Freedom of choice would lead to more purchases

### WHAT INCREASES ONLINE PURCHASES?

Nordic online shoppers would buy more of their purchases online if they had a greater degree of choice regarding service points. It is yet again clear that if consumers obtain greater freedom of choice and power to influence their deliveries, there is significant potential for even more growth in e-commerce.

The processing of returns also needs to be improved with increased freedom of choice in order to generate more e-commerce. The majority would like to be able to return products more easily in retail chains' physical stores. There is particularly substantial demand for this in Denmark where the option is not yet very widespread. Danish e-tailers that operate in both physical stores and online would probably therefore be able to count on additional online shoppers if the companies more extensively developed a system in which the consumer can go to a physical store to return an item or exchange it for a different size or model. In Norway home delivery would be a significant driving force for increased e-commerce consumption.

### What would persuade you to buy a larger proportion of your products online instead of in physical stores?

Base: Have shopped online	Nordics	Sweden	Denmark	Norway	Finland
I can choose which partner outlet/service point my products will be delivered to	14%	18%	12%	13%	2%
Products that I wish to return can be returned in the physical stores belonging to the online store at no extra charge	10%	8%	15%	8%	8%
Products that I buy online can be delivered directly to my home within 24 hours, in the evening at a time that suits me, at a surcharge	7%	7%	3%	15%	6%
The products that I order online can be conveniently collected in the retail chain's physical stores when it suits me	6%	7%	4%	6%	8%
I can collect the products from parcel machines that are accessible 24/7	5%	5%	4%	4%	7%
I can have a product delivered to my home on the same day that I ordered it online, at a surcharge	4%	3%	3%	7%	2%
Items that I wish to return can be collected from my home when convenient for me, at a surcharge	2%	2%	2%	1%	1%
None of the above would persuade me to buy a larger proportion of my products online instead of in physical stores	34%	36%	36%	26%	36%

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