

# E-commerce in the Nordics 2016



**postnord**

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## About this report

>> For the eighth year running, PostNord has conducted a study on the Nordic e-commerce market entitled E-commerce in the Nordics.

This year's report is based on online interviews conducted by TNS Sifo during each quarter of 2015. The interviews were conducted with a nationally-representative sample of private individuals aged 18-79 years in Sweden, Denmark, Norway, and Finland, respectively. It should be noted that not all of the questions included in the report were asked during each quarter.

The survey was carried out using TNS Sifo's online panel, with the following numbers of respondents per country and quarter:

	Q1	Q2	Q3	Q4	Average
Sweden	1,084	1,122	1,106	1,106	1,105
Denmark	1,163	1,205	1,193	1,149	1,178
Norway	1,408	1,191	821	1,124	1,136
Finland	1,252	1,180	1,380	1,281	1,273

Since the survey was conducted online, the findings are representative of the portion of the population with access to the Internet. Some questions were asked during one quarter only, and are therefore reported on a quarterly basis in tables and graphs.

E-commerce is defined in this report as the sale of physical products over the Internet (online). These products are then delivered to the consumer's home or to a distribution point, or are picked up by the consumer at a store, warehouse, or distribution site. Accordingly, the online purchase of services (e.g., streaming services) is not included in the definition used in this report, nor are online sales between private individuals or between companies.

PostNord also publishes the E-barometer survey in Sweden, and in Denmark, we are the main sponsor of the Danish E-commerce Association's (FDIH) E-commerce Analysis. Those reports are based on a different methodology and, therefore, are not fully comparable with this report.

\*Danish E-commerce Association

# Delivery—an important part of the e-commerce experience

**N**ordic residents have increasingly high expectations concerning e-commerce. For example, fast, convenient deliveries have become something that most people now take for granted. Nowadays, Nordic consumers are looking for an increasingly higher degree of precision and flexibility. They want to know when, where, and how a parcel will be delivered. They even want to be able to change the delivery address and time while the parcel is in transit. As a logistics partner, PostNord helps its customers to build competitive e-commerce offerings, not least of all by meeting parcel recipients' changing needs.

This year, PostNord is publishing its eighth annual E-commerce in the Nordics report. We publish these reports because we are convinced that understanding consumer needs is the key to successful e-commerce. The report reveals that, although the Nordic countries have much in common, they also differ markedly in some respects, especially in connection with deliveries. In this year's report, PostNord's panel of experts and Anders Halvarsson (founder of NetOnNet and member of the boards of directors for Ellos, Junkyard, and Scandinavian Photo) share their tips, advice, and predictions for the future. We also reveal that, in total, Nordic consumers made online purchases worth significantly more than those reported last year. In fact, in 2015, Nordic residents made online purchases totaling more than EUR 17 billion.

PostNord is constantly developing its offering. For example, in 2015 we upgraded our mobile solutions and increased transparency to provide consumers with better information about deliveries and their mail items.



Håkan Ericsson, President and Group CEO of PostNord

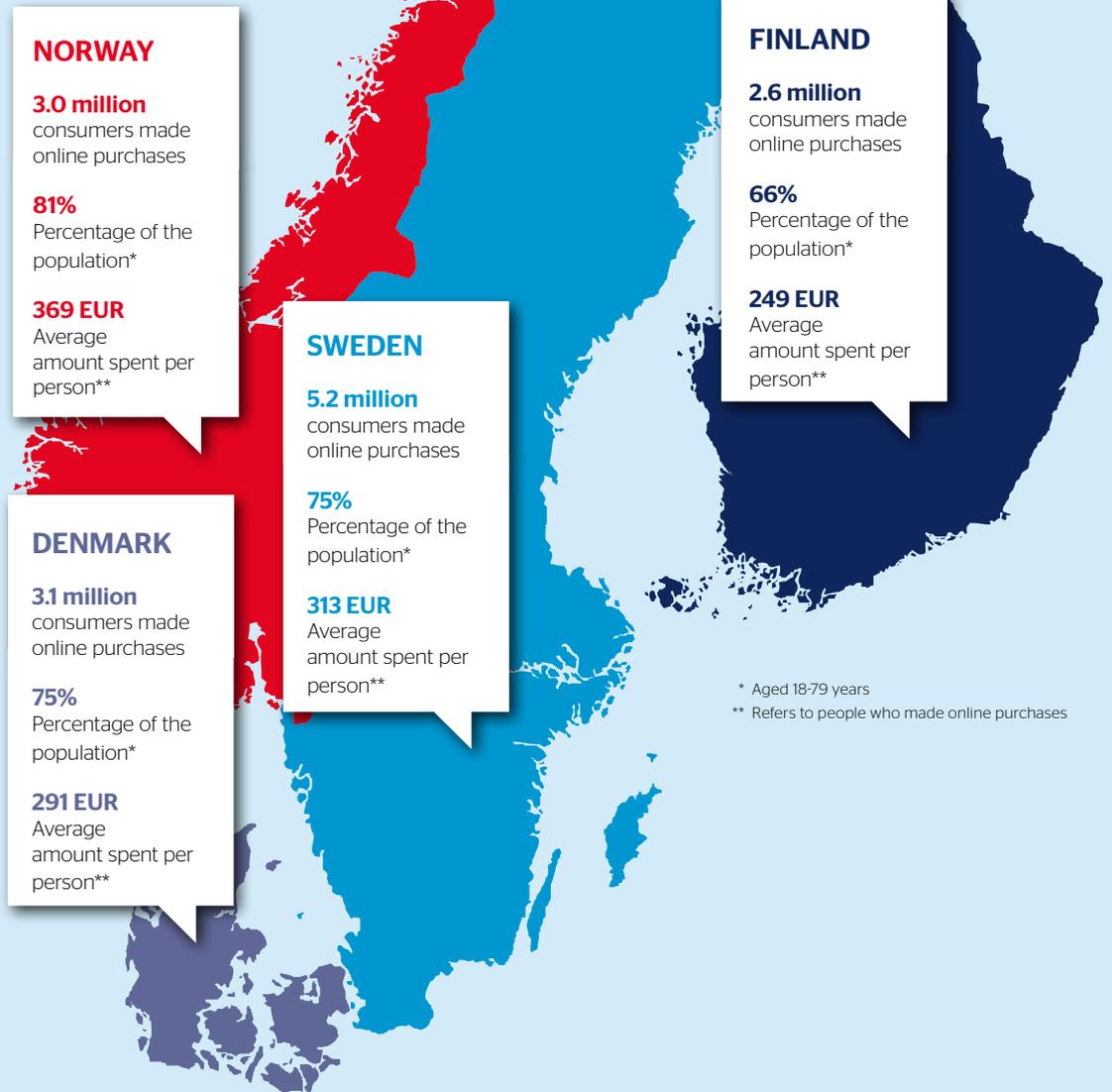
“Smooth, flexible deliveries make more people want to buy online more of the time.”

We know that delivery is an important part of the e-commerce experience and that smooth, flexible deliveries make more people want to buy online more of the time. We are the obvious choice as logistics partner for e-commerce shipments to, from, and within the Nordic region. We know the market better than anyone else. What's more, we also have the region's broadest distribution network and a comprehensive offering in the area of customer communication. By publishing the E-commerce in the Nordics report, we aim to share our specialized expertise and experience with you.

**Håkan Ericsson**

President and Group CEO  
PostNord

# An average quarter in 2015...



Norwegians made the greatest number of purchases from abroad. The Finns came in second in this category by a very narrow margin. In both countries, around half of all those who made online purchases did so from foreign retailers.

[Read more on page 28](#)



The Danes have specific expectations concerning deliveries.

[Read more on page 24](#)



Swedes showed the greatest interest in making online purchases from mobile platforms. One in five made purchases using their cell phone and just as many made purchases from tablets.

[Read more on page 20](#)



## Nordic e-commerce summarized

75

The percentage of the Nordic population (aged 18-79 years) that shops online during an average quarter.

17

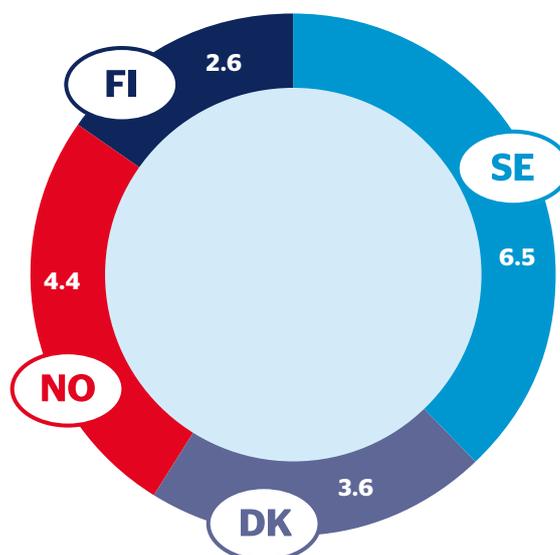
billion Euro—the total amount that Nordic consumers spent shopping online during 2015.

25

The percentage of sales made up of online purchases from foreign retailers.

### >> Nordic e-commerce 2015 (total Q1-Q4, EUR billions)

Calculated based on the respondents in each country's average response to the question "What total amount do you estimate that you have spent purchasing products online in the past three months?" (Base: Have made purchases online during the quarter)





## Logistics as a competitive advantage

**Nordic e-commerce is blossoming. The experts on PostNord's e-commerce panel, who have tracked the current trends in the market, point to everyday commodities as one future growth area. They also agree that the channel used is becoming less and less important. The most important thing is having a flexible and accessible online store and a logistics partner who can deliver parcels in the way the customer prefers.**

In PostNord's 2015 survey, consumers responded that their primary reasons for shopping online are that they feel that the range is better than in physical stores, that goods are often cheaper, and that they can shop at a time that is convenient for them. That doesn't mean that physical channels have had their day, however.

"Today's consumers place the same expectations on physical and digital commerce alike. Ultimately, this means we will need to integrate these channels to a greater extent than we do currently," explains Kristin Anfinsen, E-commerce Development Manager at PostNord Norway.

**It's a matter of being accessible** in the way that consumers want. Whether or not this is achieved physically or digitally has become less important. Arne Andersson, Nordic E-commerce Specialist at PostNord, adds:

"More and more e-retailers are also establishing physical stores, often to satisfy shoppers' demand for accessibility. In the future, the interplay between the physical and digital channels will develop and become even more sophisticated. It is a matter of getting the interface to feel the same across all channels, for example—in the physical store, on the computer, and on the cell phone."

It is also clear that it is increasingly important that the logistics partner is able to meet the increasing demands for information and flexibility in the delivery phase. Recipients expect to receive information about where their parcel is and when it will be delivered. Moreover, recipients increasingly want to be able to change the delivery address and time while the parcel is in transit. For e-retailers, the ability to offer this kind of customized delivery now comprises a competitive advantage.

**There are also other delivery trends** that our panel of experts predicts that we will see in the Nordic countries in the future:

“We will see more e-retailers differentiating between outright returns and exchanges. That is to say, exchanging sizes or colors might be free of charge, whereas returning an item outright might not,” says Jouni Lamberg, Vice President of Sales, Marketing & E-Commerce at PostNord Finland.

**The e-commerce of tomorrow will** also offer other kinds of goods, according to the panel. Purchases of daily commodities and pharmacy items are increasing, for example. E-commerce related to foodstuffs—both services offering prepacked grocery bags as well as online solutions for regular grocery shopping—is growing rapidly.

“While sales of daily commodities have grown very strongly in recent years, the category remains small. On the other hand, we’re seeing greater maturity among consumers, with more people daring to try these services, which is the key to the category’s growth. Once they’ve tried it, many people realize that it’s quite convenient not to have to carry heavy grocery bags home and that it saves time,” explains Carin Blom, E-commerce Expert at PostNord Sweden.

Some e-commerce players in other countries have successfully combined different goods categories. For example, in the UK, Sainsbury’s and Argos have joined forces to deliver both retail and daily items to consumers.

**The UK is viewed by many** as a leader when it comes to e-commerce and omnichannel; areas where the British are leading the trend.

“One contributing factor in the UK’s position as a strong e-commerce nation, both in the past and today, is its language. Their e-commerce was international from the start,” says Carsten Dalbo Pedersen, Head of E-commerce & Logistics at PostNord Denmark.

Consumers who make online purchases from international retailers are most often attracted by the price. In a scenario where the Nordic currencies weaken against the British pound and US dollar, consumers will gradually look to other countries and continents.

“Time is a precious commodity for today’s consumers, so it’s important to offer convenient solutions.”

**Carin Blom,  
E-commerce Expert,  
PostNord Sweden**

“As soon as we see the pound and the dollar increase in value, Nordic purchases from these countries decline. Price is a major factor. Nordic consumers already make some of their online purchases from countries like China, and the number doing so will grow. Both the range and lower prices attract shoppers. To put it simply, we’re curious about what’s available,” says Arne Andersson.

**For those wanting to launch** e-commerce enterprises in the Nordic countries, the experts have some practical advice to give:

“The old ‘Be global, act local’ cliché still applies,” says Jouni Lamberg. “Some people don’t want to use consultants or specialists because they cost money, despite the fact that they can provide the insight needed to be successful in foreign markets. It’s a mistake not to make use of local expertise,” he adds.

“Have a cross-border strategy from the outset; that is, a strategy that can be rolled out in multiple countries,” says Carsten Dalbo Pedersen. “That said, it’s also important to have a specific strategy for customer experience in each country,” he adds.

“Time is a precious commodity for today’s consumers, so it’s important to offer convenient solutions. Make an effort to simplify things, to provide relevant information and flexible payment solutions, and to give the customer the opportunity to choose when and how their goods will be delivered,” says Carin Blom.

“Provide information in the right language and various payment solutions and delivery options. In Denmark, consumers like home deliveries, and in Norway, they prefer to use the service points,” Kristin Anfindsen explains.

## The experts



**Arne Andersson**  
Nordic E-commerce Specialist,  
PostNord, adviser and public  
speaker



**Carin Blom**  
E-commerce Expert, PostNord  
Sweden



**Carsten Dalbo Pedersen**  
Head of E-commerce &  
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**Kristin Anfindsen**  
E-commerce Development  
Manager, PostNord Norway



**Jouni Lamberg**  
Vice President of Sales,  
Marketing & E-Commerce,  
PostNord Finland



# E-commerce tops EUR 17 billion

## Swedes the biggest online shoppers

E-commerce in the Nordic countries continued to grow in 2015, reaching a total value of EUR 17.1 billion, up from EUR 15.4 billion in 2014. The Swedes were the region's largest shopping group, spending EUR 6.5 billion in total. The Norwegians recorded the highest amount spent per capita, EUR 369 per quarter and person who purchased something online. The main reason why Nordic consumers buy goods online is that e-commerce allows them to shop when it suits them. Many people also consider shopping online to be cheaper than shopping in physical stores and feel that they have access to a larger and better selection. Time-savings and the convenience factor also drive online shopping.

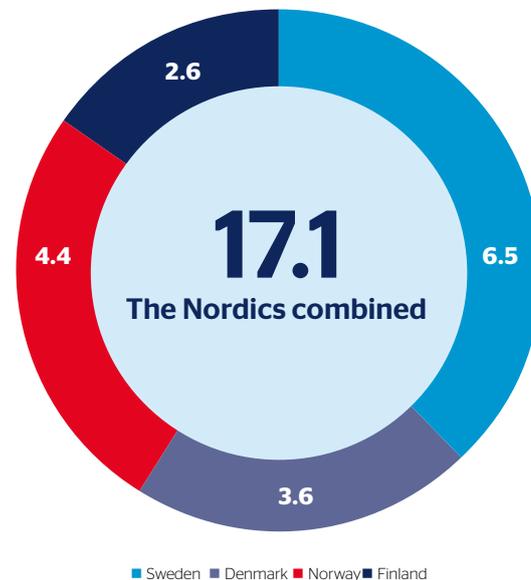
health and beauty products. For Swedes, health and beauty products are the third most popular category of goods purchased, in contrast to the other Nordic countries, where home electronics is the third most popular category after clothing and footwear, and media.

### Continued growth

>> Nordic e-commerce 2015

(total Q1-Q4, EUR billions)

Calculated based on the respondents in each country's average response to the question "What total amount do you estimate that you have spent purchasing products online in the past three months?" (Base: Have made purchases online during the quarter)



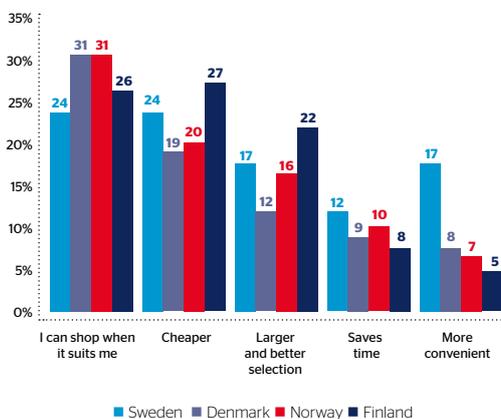
## Similar preferences in goods purchased

Across all the Nordic countries, the most popular product categories are clothing and footwear, and media (including books, films, and video games). Home electronics is another category of products that Nordic consumers tend to buy online, as well as

### Why do Nordic consumers shop online?

>> What is the single biggest advantage of buying goods online instead of in a traditional store? (Q4, %)

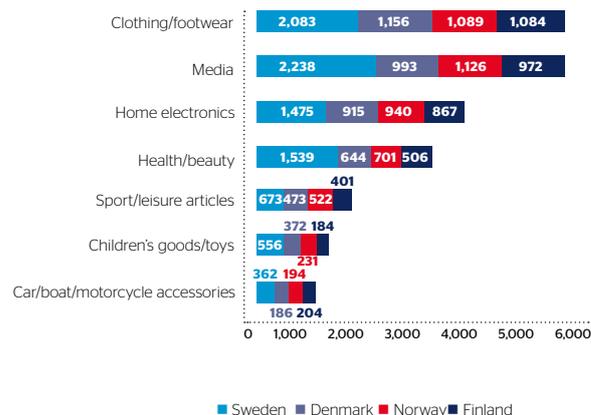
Base: Have made purchases online during the quarter



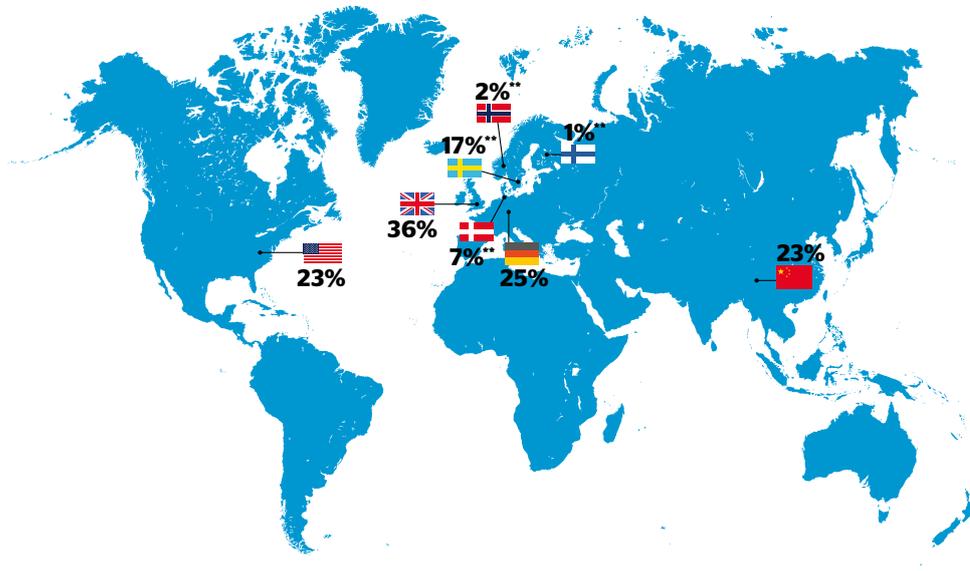
### Clothing/footwear and media dominate

>> Number of consumers who have shopped online in the product categories below (average Q1-Q4, in thousands)

Calculated based on responses to the question "What types of goods have you bought online in the past three months?" (Base: Have made purchases online during the quarter)



## Five countries dominate – from where Nordic consumers shop when they make online purchases from international retailers\*



\*Responses to the question "From which foreign countries have you purchased goods online in the past three months?" (Nordics, average Q1-Q4. %)  
 Base: Have purchased goods online from abroad during the quarter.  
 \*\*Refers to all Nordic consumers who purchased goods online from abroad, except for those residing in the respective country.

## One in four online purchases are cross-border

### UK is no. 1

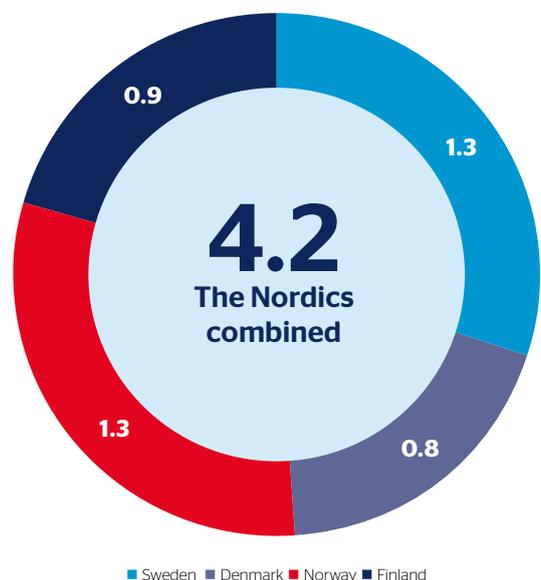
A full 25 percent of e-commerce trading was from international sellers. The Norwegians and Swedes spent the largest total amount, while the consumers most eager to make purchases from abroad were found in Norway and Finland, where nearly half of everyone that made online purchases reported that they also have made international purchases. In Denmark, the corresponding figure is 36 percent and in Sweden, 32 percent. Nordic consumers prefer to make their cross-border purchases from the UK, followed by Germany, the US, and China. Within the Nordic region, consumers overwhelmingly made most of their cross-border purchases from Swedish retailers.

down by nationality, Swedes and Finns prefer to buy clothing online, whereas Norwegians and Danes prefer to purchase home electronics and media to almost the same degree.

### Norwegians lead the field

#### >> Online purchases from abroad (total Q1-Q4, EUR billions)

Calculated based on the respondents in each country's average response to the question "What total amount do you estimate that you have spent purchasing products online from international sites in the past three months?" (Base: Have purchased goods online from abroad during the quarter)



### Same product categories as for domestic commerce

Nordic consumers purchase goods from online international retailers in the same categories as they do from domestic online retailers. Clothing and footwear, followed by home electronics and media, are the most popular categories. Broken

“The domestic market’s relative maturity is what drives international commerce. The Swedish range has been good. Finland’s, Norway’s, and Denmark’s domestic alternatives haven’t been as good, which has made local consumers more eager to buy online from foreign retailers.”

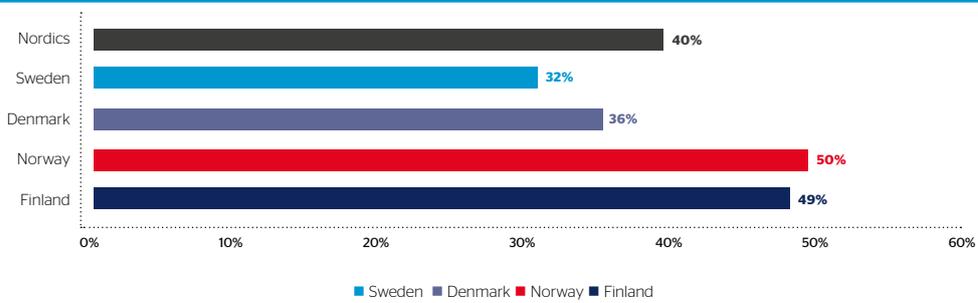
**Carsten Dalbo Pedersen, Head of E-commerce & Logistics, PostNord Denmark**



**Almost as common in Finland as in Norway**

>> Have you purchased goods online from abroad at any time during the past three months? (average Q1-Q4, %)

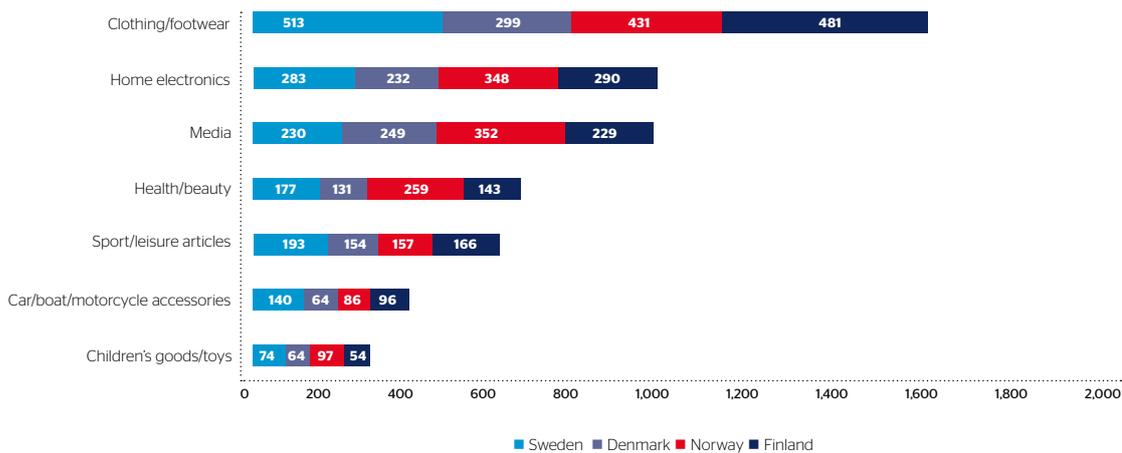
Base: Have made purchases online during the quarter



**Clothing and footwear clear favorites**

>> Number of people who purchased goods online from abroad in each product category (average Q1-Q4, thousands)

Calculated based on the question “Which goods have you purchased online from abroad during the past three months?” (Base: Have purchased goods online from abroad during the quarter)



# Multichannel buying processes

## Boundaries are disappearing

Today, a large proportion of physical commerce includes digital elements. During an average quarter, half of all survey respondents say that they have done research online prior to purchasing goods in a physical store. The leading product category within which this kind of purchase is made is home electronics, especially in Norway and Finland. It is less common for the purchasing process to occur by consumers who test goods in a physical store before making a purchase online. Sweden leads this trend, with nearly one in five respondents there stating that they have made purchases this way. Clothing and footwear are clear favorites for this type of purchase.

“Consumers don’t distinguish between channels anymore. It’s just as common to make purchases from digital stores as it is from physical stores.”

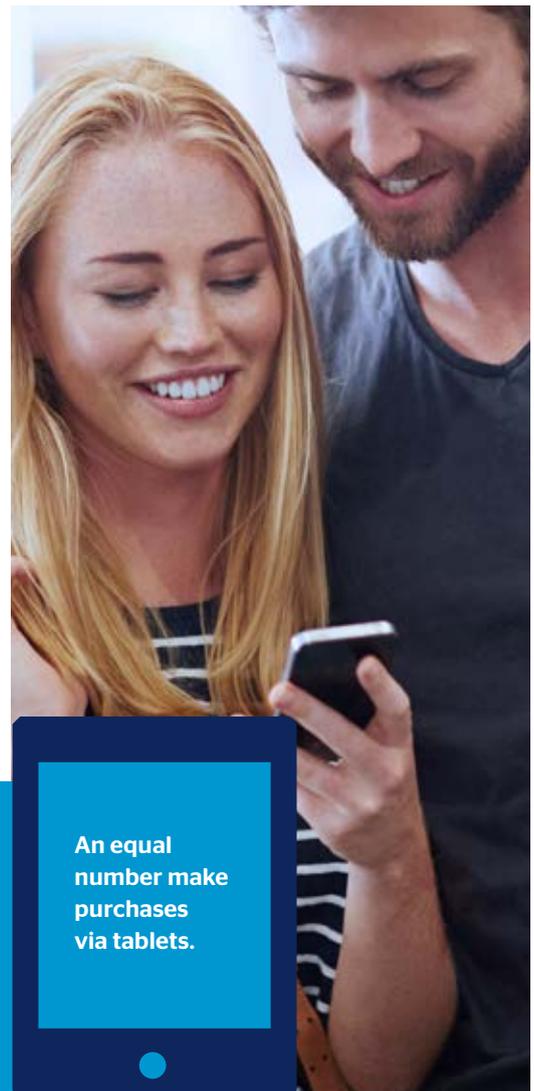
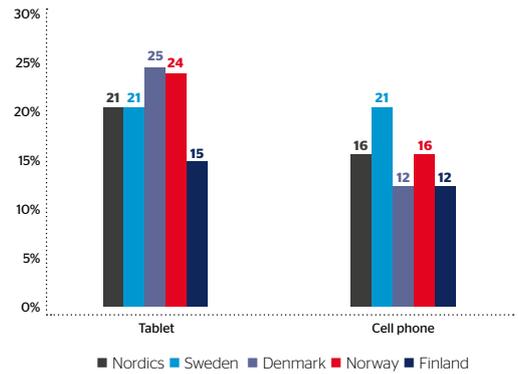
**Arne Andersson**  
**Nordic E-commerce Specialist, PostNord**

## E-commerce using mobile devices

Danish and Norwegian consumers show a clear preference for making online purchases on tablets, as opposed to via cell phones. The difference between these two platforms is significantly less pronounced in Finland, and, in Sweden, an equal number of consumers use both platforms. For an e-retailer to be successful, it is crucial that they investigate how consumers prefer to shop within a particular product category and to adapt their offering accordingly.

### More online purchases made via tablets than cell phones

>> Which devices have you used to buy goods online in the past three months? (average Q1, Q2, Q4, %)   
 Base: Have made purchases online during the quarter

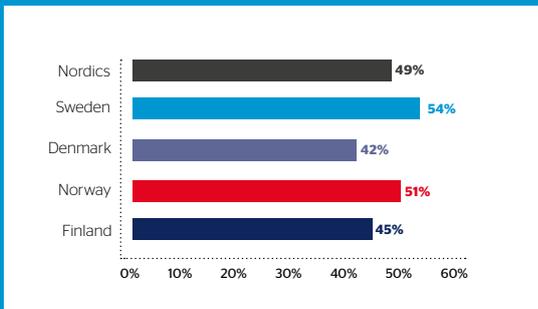


**1 in 5**  
 The proportion of Swedish online shoppers who make purchases via their cell phone during an average quarter.

An equal number make purchases via tablets.

## Do research online —buy in-store

>> In the past three months, have you done research on a product online before purchasing it in a store? (average Q1, Q2, Q4, %)  
Base: Have made purchases online during the quarter



## Nordic consumers' top three product categories for purchases of this kind\*



### 1. Home electronics

Sweden: 41%  
Denmark: 30%  
Norway: 48%  
Finland: 48%



### 2. Clothing and footwear

Sweden: 26%  
Denmark: 22%  
Norway: 23%  
Finland: 26%



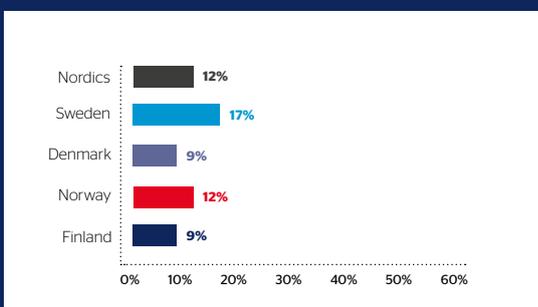
### 3. Media

Sweden: 17%  
Denmark: 19%  
Norway: 19%  
Finland: 20%

\*Responses to the question "In the past three months, which types of products have you first done research on online before purchasing them in a store?" (Q4, %). Base: Have done research on a product online before making an in-store purchase. "Top three" refers to the largest categories, based on a weighted average for the Nordics as a whole.

## Do in-store research —buy online

>> In the past three months, have you first looked at/tried a product in a store before purchasing it online? (average Q1, Q2, Q4, %)  
Base: Have made purchases online during the quarter



## Nordic consumers' top three product categories for purchases of this kind\*



### 1. Clothing and footwear

Sweden: 45%  
Denmark: 42%  
Norway: 38%  
Finland: 53%



### 2. Home electronics

Sweden: 17%  
Denmark: 23%  
Norway: 22%  
Finland: 32%



### 3. Sport and leisure articles

Sweden: 13%  
Denmark: 14%  
Norway: 18%  
Finland: 25%

\*Responses to the question "In the past three months, which types of products have you first looked at/tried in a store before purchasing them online?" (Q4, %). Base: Have done in-store research on a product before making an online purchase. "Top three" refers to the largest categories, based on a weighted average for the Nordics as a whole.

3.4



The average number of business days Danes are willing to wait for delivery of a mail item ordered online. Danes have the highest expectations concerning fast deliveries of all Nordic residents.



# Options are more important than speed

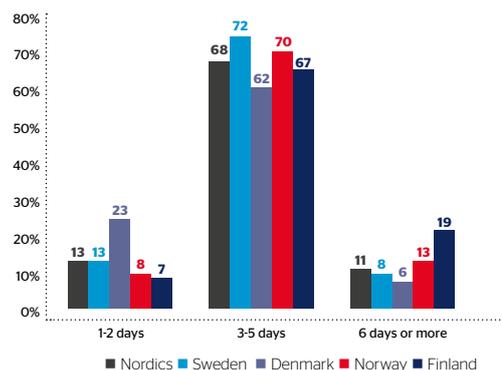
## Difference in preferences—local adaptation needed

There are major differences in how Nordic consumers prefer to have their mail items delivered. Danes have high expectations concerning fast deliveries and value the option to have goods delivered to their workplace, to a parcel machine, or to their home during daytime hours. Swedes and Norwegians have similar preferences when it comes to delivery time and prefer to have parcels delivered to their home mailboxes, or alternatively, to pick them up from a partner outlet. Finnish consumers are the most patient and prefer to pick up their parcels from partner outlets.

### Finns are the most patient

>> When ordering a product online, what are your expectations concerning delivery time; i.e. how many days are you willing to wait, at most, to receive your goods? (Q1, %)

Base: Have made purchases online during the quarter



### The average Nordic consumer's tolerance level for delivery times

(number of business days)\*:

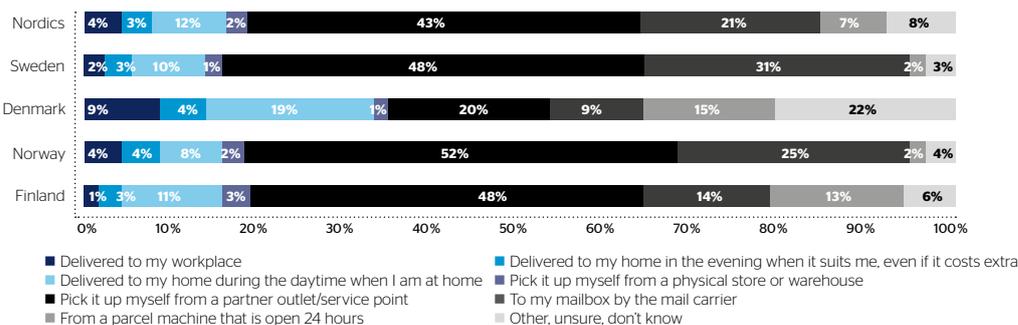
<b>Nordics:</b>	<b>3.9</b>
<b>Sweden:</b>	<b>3.9</b>
<b>Denmark:</b>	<b>3.4</b>
<b>Norway:</b>	<b>4.1</b>
<b>Finland:</b>	<b>4.4</b>

\*Mean values based on the responses shown in the diagram above.

### Varying preferences concerning delivery method

>> When you purchase a product online and have the opportunity to choose how it will be delivered, how do you generally prefer to receive it? (Q1, %)

Base: Have made purchases online during the quarter



# A convenient return process is important

## Clear procedures are a key expectation

Nordic consumers want clear returns procedures. Just under 90 percent of Norwegians and Finns and over 90 percent of Danes and Swedes say that, when choosing an online store, they consider clear procedures for returns to be either very important or quite important.

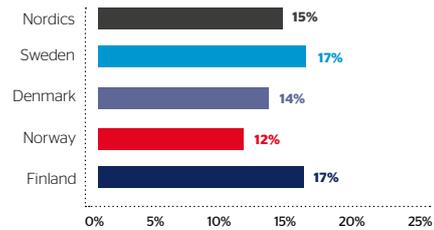
## Norway has the lowest percentage of returns

This is not an indication that Nordic consumers return goods often, however. Fifteen percent of Nordic consumers say that they returned an item during the last quarter. In Norway, the corresponding figure is 12 percent, and in Denmark, 14 percent. Swedes and Finns are somewhat more inclined to make use of return options, with 17 percent responding that they have returned an item purchased online at some time.

### Low proportion of people who have returned goods

>> In the past three months, have you returned a product that you purchased online? (Q1, %)

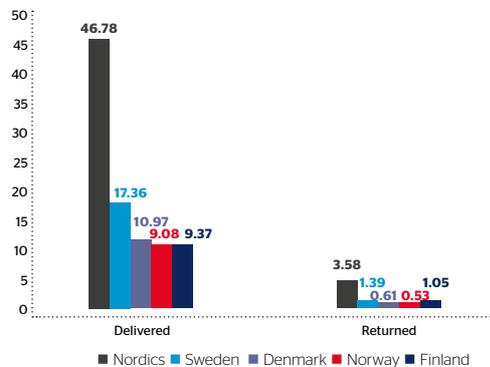
Base: Have made purchases online during the quarter



### 3.6 million mail items returned in Q1 2015

>> Number of mail items delivered and returned (Q1, millions)

Calculated based on the respondents in the respective countries' average response to the questions "How many shipments of goods purchased online (parcels/letters) do you estimate that you have received in the past three months?" (Base: Have made purchases online during the quarter) and "How many goods purchased online do you estimate that you have returned during the past three months?" (Base: Have returned a product bought online during the quarter)



**Fifteen percent of Nordic consumers say that they have returned an item during the last quarter.**





**36%**

The percentage of Norwegians who shop online and have never returned a shipment. In Sweden, the figure is 33% and in Denmark, 32%.\*

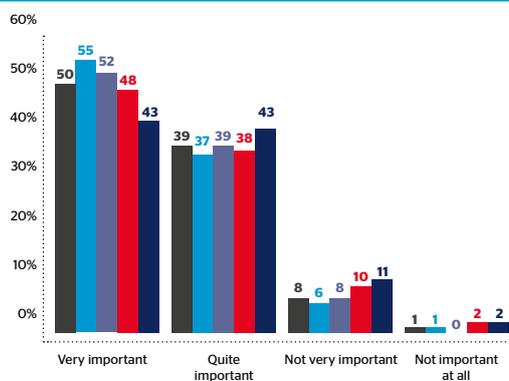
\*No data are available for Finland due to differences in how the question was asked.

**Returns process is important when Nordic consumers choose online stores**

>> How important are the following in connection with delivery when you decide which online store/site you will buy a product from?

That clear information is provided about returns procedures (Q2, %)

Base: Have made purchases online during the quarter

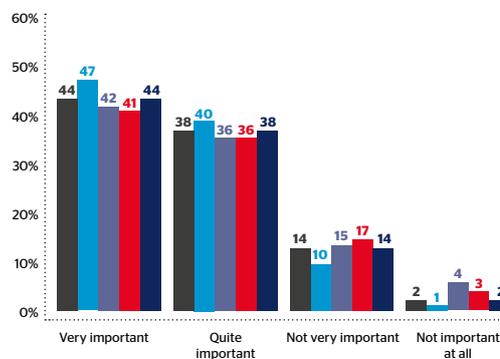


■ Nordics ■ Sweden ■ Denmark ■ Norway ■ Finland

**Clear returns procedures are more important than free returns**

>> How important are the following in connection with delivery when you decide which online store/site you will buy a product from? That returns are free of charge (Q2, %)

Base: Have made purchases online during the quarter



■ Nordics ■ Sweden ■ Denmark ■ Norway ■ Finland



## “No matter what you do, make sure you have a good offering as your foundation”

**Anders Halvarsson is the industry guru who founded NetOnNet and who currently sits on the boards of directors for Ellos, Junkyard, and Scandinavian Photo. Anders has solid and extensive experience within Nordic e-commerce. He knows how things should be done, what works, and what to prioritize. In an interview with Anders, PostNord took the opportunity to ask him about his view on the future of e-commerce and what pieces of advice he would like to give to current and prospective e-retailers.**

### **Tell us about your background in Nordic e-commerce.**

I got my start with NetOnNet in 1999, where I stayed for many years. Though we didn't realize it at the time, we were in the process of developing what would later come to be called “omnichannel.” That is, full integration among the channels. Today, I mostly work with e-commerce at the board level of corporate management. In reality, though, my background is as a generalist. I don't see myself first and foremost as an e-retailer or e-commerce expert, but as a retailer who sells online.

### **You have experience working in a number of different goods segments. What common success factors do you see among these?**

What they have in common is that they are all based

on commerce and commerciality. No matter what you do, you must have a good offering as your foundation. Otherwise, you won't succeed as either a retailer or an e-retailer. Once you've established yourself, it's a matter of being able to deliver on your customers' orders in an efficient way. In e-commerce, one clear success factor is having well-organized logistics, order flow, and customer service. It's different from physical stores, where you don't generally receive orders for goods other than those already in the store, and so can better get away with deficiencies in your logistics system, for example.

### **In your opinion, what are the biggest similarities and differences between the Nordic countries?**

At the basic level, I see a number of similarities and differences. Sweden stands out because its larger population means a bigger market in which you can

## Anders' advice to businesses wanting to establish online stores in the Nordic region:

**Have a competitive offering**

**Do your homework on each individual market**

**Start narrow with a focused range**

**Adapt your online store to suit mobile devices**

**Ensure you have well-organized logistics, order flow, and customer service.**



more quickly build up a critical mass of consumers. It seems to me that Swedish sites invest a little more in the technology and revamp themselves a little more often. You can also see differences in how often Nordic consumers buy from international sites. This has nothing to do with the consumers' maturity, though, but has more to do with the domestic range, where a bigger market like Sweden's has more to offer. In terms of price level, the average prices in Norwegian online stores tend to be a little higher, though that's mostly because they more often choose premium products, not because of a greater willingness to pay. In principle, price awareness is the same across the Nordics.

### What are the biggest changes that e-commerce has undergone in recent years?

Hands down, the biggest change is the shift to purchasing on mobile devices. This opens up new opportunities, but also leads to increased costs for e-retailers initially, because they have to adapt to the platform. It's not necessarily enough to develop a responsive version of your desktop site. From an international perspective, I see examples where apps are starting to play a bigger role.

### What trends do you see on the deliveries side?

Deliveries must be fast and convenient. That's a clear expectation from the customers' side. But the scramble for ever-faster deliveries that we saw a few years ago seems to be dying down. In the companies I'm involved in, we're instead starting to see delivery precision become more important than speed. There's no point in offering home delivery if there's no one at home, for example. If you can improve precision from "sometime between 10 AM and 5 PM on Thursday," to "sometime between 12 PM and 2

PM," then you can compete with physical stores. I think delivery precision will be a success factor in the future.

### Nowadays, both physical and digital elements are often involved when making a purchase. How do you think this interplay will develop in the future?

I think we're going to see some altered concepts in physical commerce. But just what that will mean is something you can really only speculate about. Above all, I think that the development will be different in different industries. The Swedish retailer Webhallen is an example of a successful, somewhat new concept in its segment. At the same time, I see more and more online stores offering goods that can't be examined physically, and that this can also work very well. Daniel Wellington watches are one example of this trend.

### What does a company need to do to establish a successful e-commerce offering in the Nordic market?

The most important thing is to do your homework. I see a relatively large number of fundamental mistakes. One clear example is payment solutions: If you set up in Denmark and don't offer the opportunity to pay using Dankort, you eliminate a large group of potential buyers. It's good to have a local presence, but if you do your homework well enough, it's not strictly necessary. I think it's more important not to run up too large an overhead in each country. When it comes to offerings, I think you should start narrow, with a focused range. Many fail because their ranges are a little too large. Instead of widening out in your home market, you can go international.

## Sweden

» Population (18-79 years)	<b>7,262,665</b>
» Percentage of population with access to the Internet	<b>95%</b>
» Percentage of population who shop online at least once a year <sup>1</sup>	<b>87%</b>
» Percentage of population who shop online at least once a month <sup>1</sup>	<b>37%</b>
» Percentage of population who buy online from international retailers <sup>2</sup>	<b>32%</b>
» Average purchase amount per online shopper, per quarter (EUR)	<b>313</b>
» Average maximum number of business days consumers are prepared to wait for deliveries <sup>3</sup>	<b>3.9</b>

<sup>1</sup> Average Q1, Q2, Q4; Base: Entire population aged 18-79 years

<sup>2</sup> Average Q1-Q4; Base: Have made purchases online during the quarter

<sup>3</sup> Q1

# The largest e-commerce nation

## Media is the most popular category

Swedes like to shop online and media is their favorite category of goods for online purchases, followed by clothing and footwear. They also like to buy health and beauty products and home electronics online. Swedes make online purchases for an average of EUR 313 per quarter and 37 percent say that they shop online at least once a month. A full 87 percent say that they shop online at least once a year. The proportion of Swedish consumers who purchase goods online from abroad is 32 percent. Of all Nordic residents, Swedes are the most interested in omnichannel commerce. Fifty-four percent say that they have done research online before making their purchase in a physical store. Seventeen percent say that they

have done the reverse by examining a product in-store before purchasing it online.

## UK stores are no. 1

Swedes' favorite international e-commerce destinations are the UK and Germany. Thirty-four and 27 percent, respectively, of those who have made online purchases from abroad say that they have bought from these countries. A significant proportion of Swedish consumers also buy from the US and China. Within the Nordic region, Swedes buy most from Denmark. Denmark is one of Sweden's top five most popular countries to buy from, although it lags a long way behind the top four countries on the list.

**Total amount Swedes estimate spending on online purchases in 2015 (EUR bn):**

**6.5\***

**Of which, purchases from abroad:**

**20%**

**Top five most popular countries from which Swedes buy**

- UK - 34%
- Germany - 27%
- USA - 24%
- China - 24%
- Denmark - 7%

Responses to the question "From which foreign countries have you purchased goods online in the past three months?" (average Q1-Q4); Base: Have purchased goods online from abroad during the quarter

**Percentage who did research online before buying in-store**

**54%**

**Percentage who did in-store research before buying online**

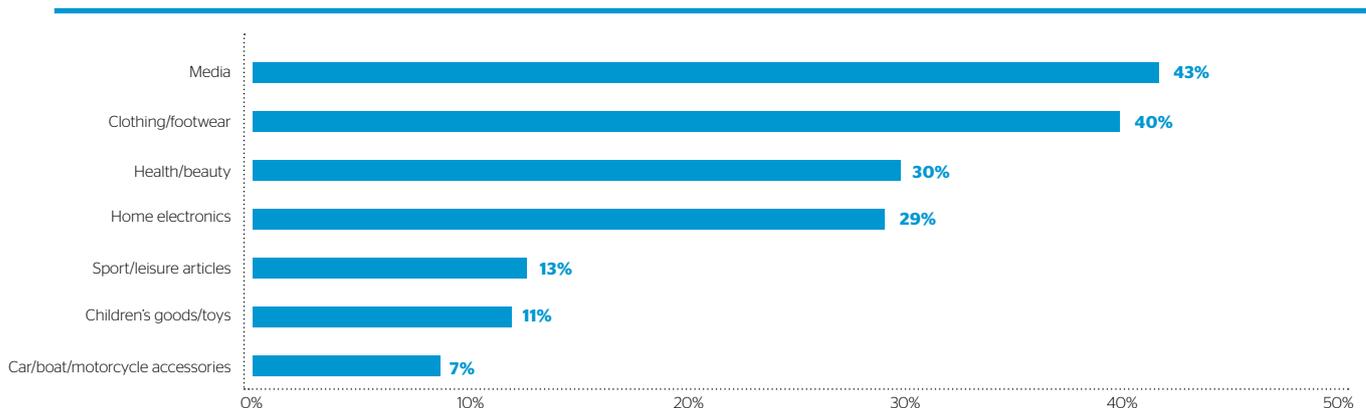
**17%**

Responses to the question: "In the past three months, have you first done research online about a product that you later bought in a store?" and "In the past three months, have you first looked at/ tried out a product in a store that you then bought online?" (Both averages Q1, Q2, Q4); Base: Have made purchases online during the quarter

\*Unlike the E-barometer survey, this figure refers to Swedish consumers' e-commerce consumption both within Sweden and abroad. The E-barometer measures Swedish businesses' sales and, as such, does not include Swedes' e-commerce consumption from foreign retailers.

### >> What types of goods have you bought online in the past three months? (average Q1-Q4, %)

Base: Have made purchases online during the quarter



# Debit cards and invoices are the preferred payment options

Most Swedes make online purchases at least once per quarter, although nearly as many shop online once a month. Nine percent say that they shop online 2-3 times a month and two percent say that they do so every week.

Debit cards and invoices are the most popular payment options. The second most popular payment method is direct payment via a bank. PayPal, Payson, and similar services are used less frequently; only seven percent say that they prefer to pay using these services.

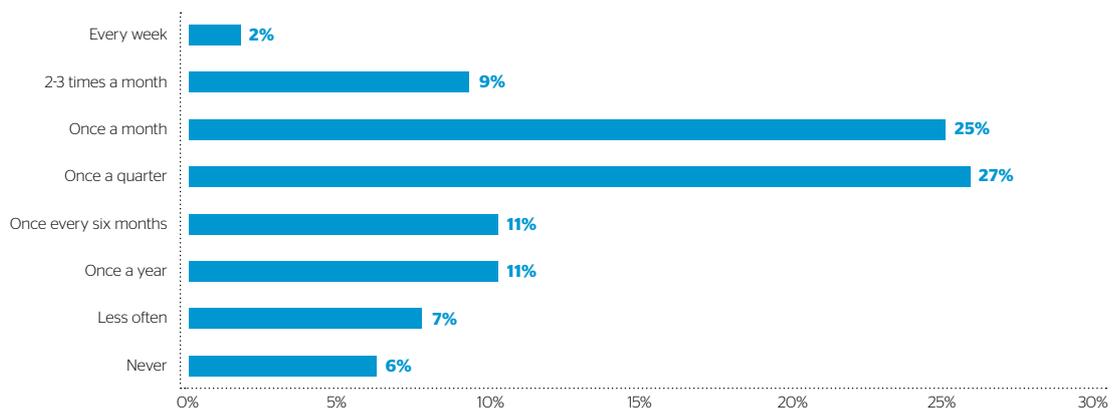
Swedes are relatively patient. On average, they are content to wait 3.9 days to have their goods delivered. The largest proportion of like-minded consumers, 32 percent, want their goods delivered within three business days, while a full 27 percent are happy to wait five days. Just over ten percent say that they are content to wait two and four business days, respectively.

“Retailers must realize how important the cell phone is in Swedes’ purchasing process these days. We’re moving more and more between different channels, and it’s a matter of creating a seamless buying journey if you don’t want to lose customers to the competition.”

**Carin Blom, E-commerce Expert, PostNord Sweden**

## The majority buy once a quarter or once a month

>> [Approximately how often do you buy goods online?](#) (average Q1, Q2, Q4, %)  
Base: Entire population aged 18-79 years





### Invoices are as popular as card payments

>> Which of the following methods do you prefer when paying for a product purchased online? (Q4, %)

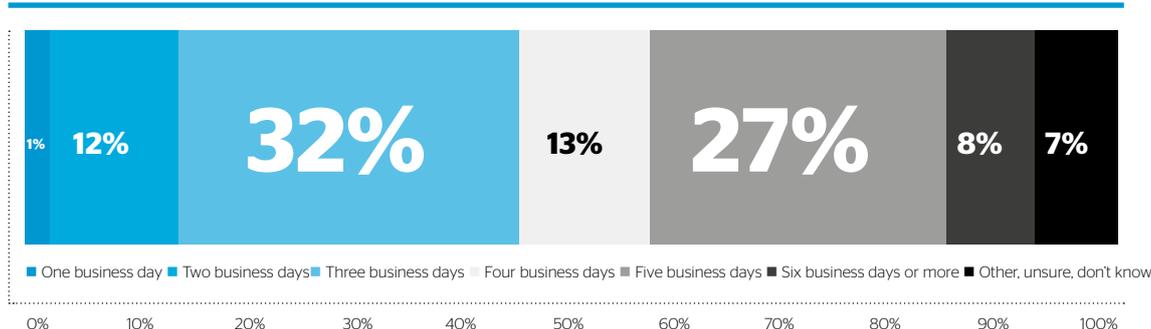
Base: Have made purchases online during the quarter



### Three-day limit for most people

>> When you order a product online, what are your expectations concerning the delivery time; i.e. what is the maximum number of days you are prepared to wait to receive your goods? (Q1, %)

Base: Have made purchases online during the quarter



## Denmark

» Population (18-79 years)	<b>4,250,412</b>
» Percentage of population with access to the Internet	<b>97%</b>
» Percentage of population who shop online at least once a year <sup>1</sup>	<b>88%</b>
» Percentage of population who shop online at least once a month <sup>1</sup>	<b>40%</b>
» Percentage of population who buy online from international retailers <sup>2</sup>	<b>36%</b>
» Average purchase amount per online shopper, per quarter (EUR)	<b>291</b>
» Average maximum number of business days that consumers are prepared to wait for deliveries <sup>3</sup>	<b>3.4</b>

<sup>1</sup> Average Q1, Q2, Q4; Base: Entire population aged 18-79 years

<sup>2</sup> Average Q1-Q4; Base: Have made purchases online during the quarter

<sup>3</sup> Q1

# A small but mature e-commerce nation

## Clothing and footwear are no. 1

A high proportion of Danish consumers—89 percent—shop online at least once a year. Those who shop online spend an average of EUR 291 per quarter, which is somewhat less than Swedes and Norwegians. The proportion of Danish consumers who purchase goods from international online stores is 36 percent. Clothing and footwear is Danes’ favorite goods category when they shop online. Like their Nordic neighbors, Denmark’s three favorite goods categories are clothing and footwear, media, and home electronics.

## Buying from Sweden is common

Danes make most of their international online purchases from the UK. Almost half of all Danes who have bought goods online from abroad—46 percent—have bought from the UK. Germany comes in at a solid second, while the US and China share third place. When it comes to shopping online in the Nordic region, Sweden is the Danes’ favorite marketplace.

**\$ Total amount Danes estimate spending on online purchases in 2015**  
(EUR bn):

**3.6**

**Of which, purchases from abroad:**

**22%**

**Top five most popular countries from which Danes buy**

UK - 46%  
Germany - 30%  
USA - 18%  
China - 18%  
Sweden - 13%

Responses to the question "From which foreign countries have you purchased goods online in the past three months?" (average Q1-Q4); Base: Have purchased goods online from abroad during the quarter

**Percentage who did research online before buying in-store**

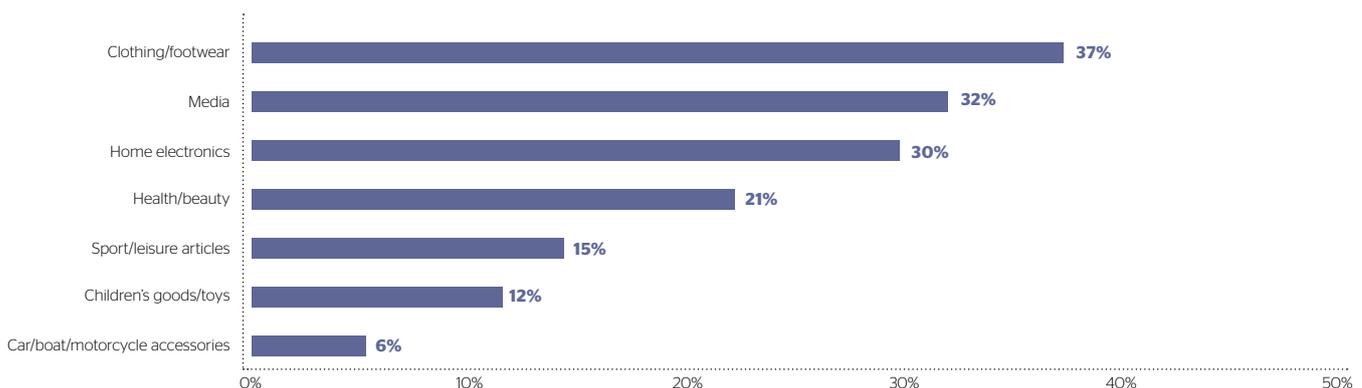
**42%**

**Percentage who did in-store research before buying online**

**9%**

Responses to the question: "In the past three months, have you first done research online about a product that you later bought in a store?" and "In the past three months, have you first looked at/tried out a product in a store that you then bought online?" (both averages Q1, Q2, Q4); Base: Have made purchases online during the quarter

>> Which types of goods have you bought online in the past three months? (average Q1-Q4, %) Base: Have made purchases online during the quarter



# Danes are the most impatient

Forty percent of Denmark's population buys goods online at least once a month. Eighty-nine percent say that they shop online at least once a year. Denmark ranks highest in the percentage of Nordic consumers who shop online more than once a year.

There is a strong preference among Danish consumers to pay using cards: 83 percent prefer this method of payment. A much smaller percentage prefers to use PayPal, Payson, or similar services. Equal numbers prefer to pay COD or by invoice.

Danes are prepared to wait an average of 3.4 days for their deliveries, making them the least patient among Nordic residents. Twenty-one percent want their goods delivered within two business days, while 14 percent say that they are willing to wait five business days.

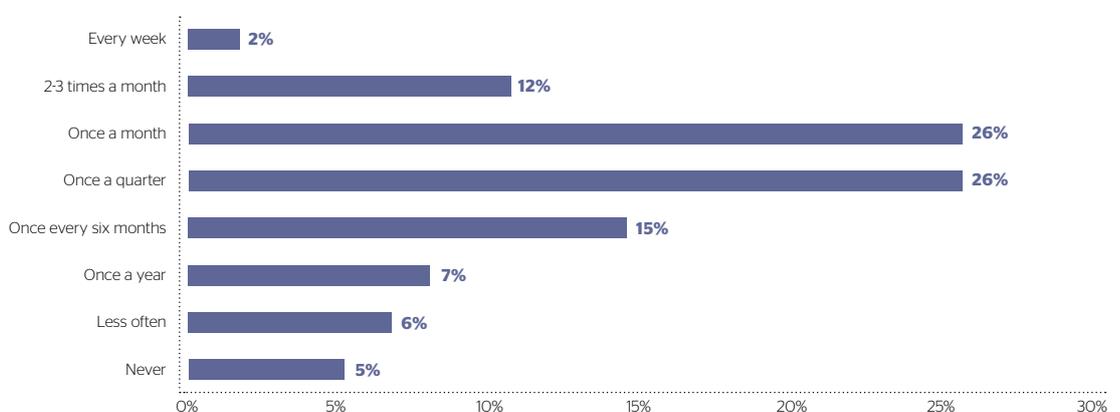
“Home deliveries are a long-standing tradition in Denmark. That’s the way it’s always been, and home deliveries are what consumers have expected. In recent years, however, service points have become more prominent. So, things are changing.”

**Carsten Dalbo Pedersen,**  
**Head of E-commerce &**  
**Logistics, PostNord Denmark**

## Largest proportion of Nordic residents who shop online more than once a year

>> Approximately how often do you buy goods online? (average Q1, Q2, Q4, %)

Base: Entire population aged 18-79 years





### Card payments clearly dominant

>> Which of the following methods do you prefer when paying for a product purchased online? (Q4, %)

Base: Have made purchases online during the quarter



### Highest expectations concerning delivery times

>> When you order a product online, what are your expectations concerning the delivery time, i.e. what is the maximum number of days you are prepared to wait to receive your goods? (Q1, %)

Base: Have made purchases online during the quarter



## Norway

» Population (18-79 years)	<b>3,819,761</b>
» Percentage of population with access to the Internet	<b>97%</b>
» Percentage of population who shop online at least once a year <sup>1</sup>	<b>85%</b>
» Percentage of population who shop online at least once a month <sup>1</sup>	<b>39%</b>
» Percentage of population who buy online from international retailers <sup>2</sup>	<b>50%</b>
» Average purchase amount per online shopper, per quarter (EUR)	<b>369</b>
» Average maximum number of business days consumers are prepared to wait for deliveries <sup>3</sup>	<b>4.1</b>

<sup>1</sup> Average Q1, Q2, Q4; Base: Entire population aged 18-79 years

<sup>2</sup> Average Q1-Q4; Base: Have made purchases online during the quarter

<sup>3</sup> Q1

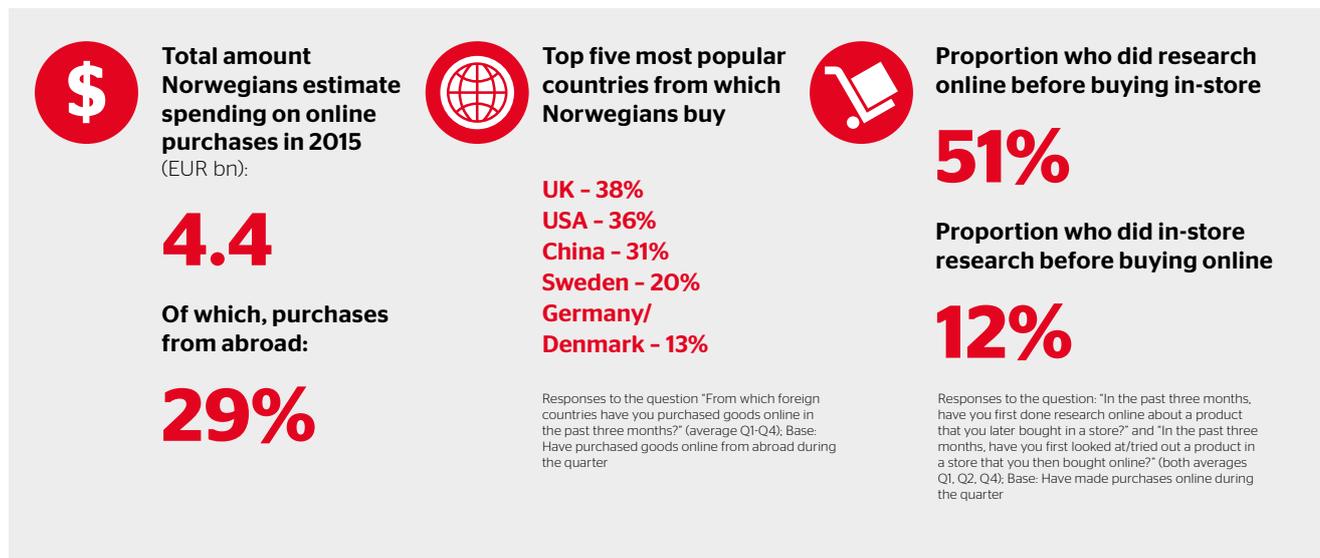
# Spend most online per capita

## Media is no. 1

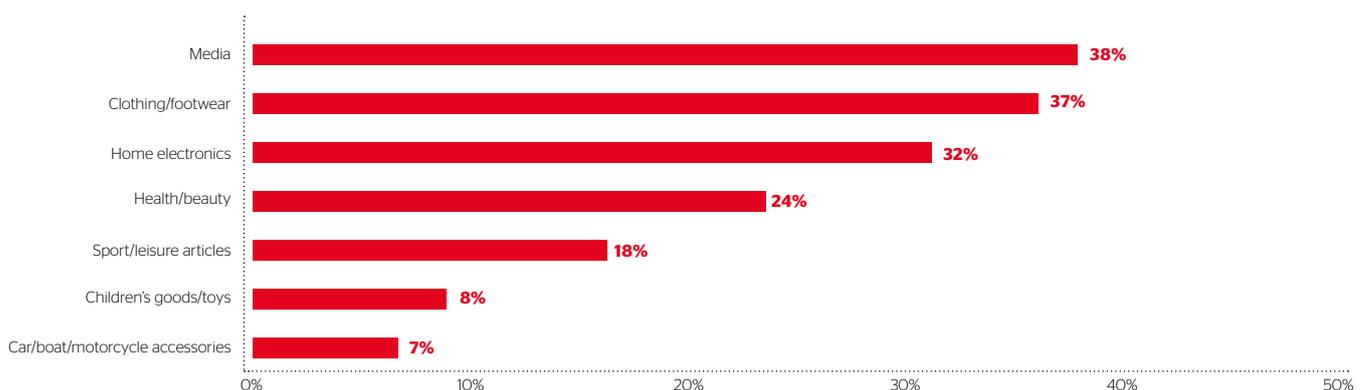
In Norway, 85 percent of consumers say that they shop online at least once a year. Norwegians spend more per person on online shopping than their Nordic counterparts—EUR 369 per person and quarter on average. Fifty percent have made online purchases from abroad. Like their Swedish neighbors, Norwegians most like to purchase media when shopping online. Clothing and footwear are also popular. As with the rest of the Nordic region, home electronics and health and beauty products are also among Norwegians' favorite purchases.

## Germany is less popular

Among international markets, Norwegians prefer to buy online from the UK, as do Swedes and Danes. China and the US are also popular, as is Sweden. Twenty percent of Norwegians who have bought from foreign online vendors have bought goods from Sweden. Thirteen percent have purchased goods online from Denmark or Germany, making Germany less popular among Norwegian shoppers than it is among their Nordic neighbors.



>> What types of goods have you bought online in the past three months? (average Q1-Q4, %) Base: Have made purchases online during the quarter



# The largest percentage who shop online more than once a month

Twenty-five percent of Norwegian consumers shop online at least once a quarter, and a full 85 percent say that they buy online at least once a year. Sixteen percent buy more than once a month; the highest proportion among the Nordic countries.

The majority of Norwegians—59 percent—prefer to pay using debit cards. Sixteen percent say that they prefer to receive an invoice. An equally large percentage say that they prefer to pay using PayPal, Payson, or a similar service, which is the largest proportion among the surveyed countries.

Norwegians are willing to wait 4.1 business days to receive their parcels. Twenty-six percent say that they prefer to receive their mail items within two business days, while 25 percent are prepared to wait five business days.

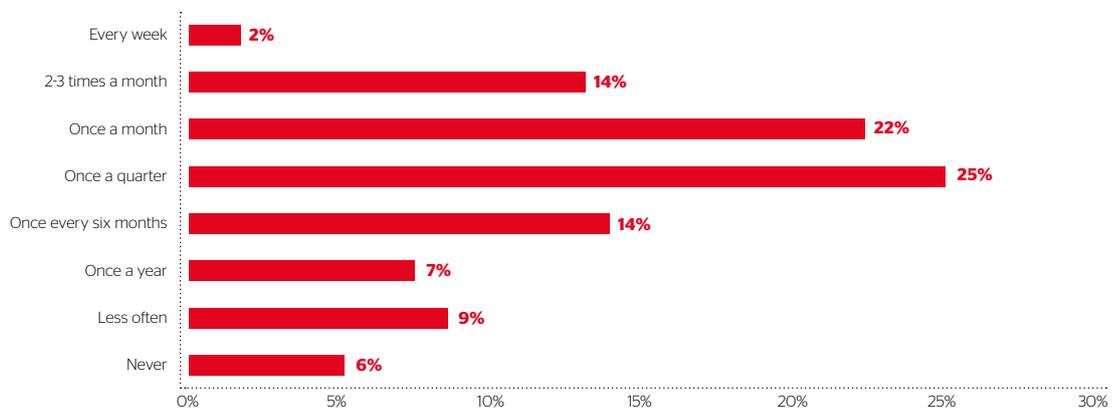
“Historically, Norway has enjoyed strong exchange rate development, which has contributed to its strong purchasing power. Foreign online stores have also been increasingly successful in adapting their sites to accommodate the Norwegian language and currency.”

**Kristin Anfindsen,  
E-commerce Development  
Manager, PostNord Norway**

## Largest percentage of Nordic consumers who shop online more than once a month

>> **Approximately how often do you buy goods online?** (average Q1, Q2, Q4, %)

Base: Entire population aged 18-79 years

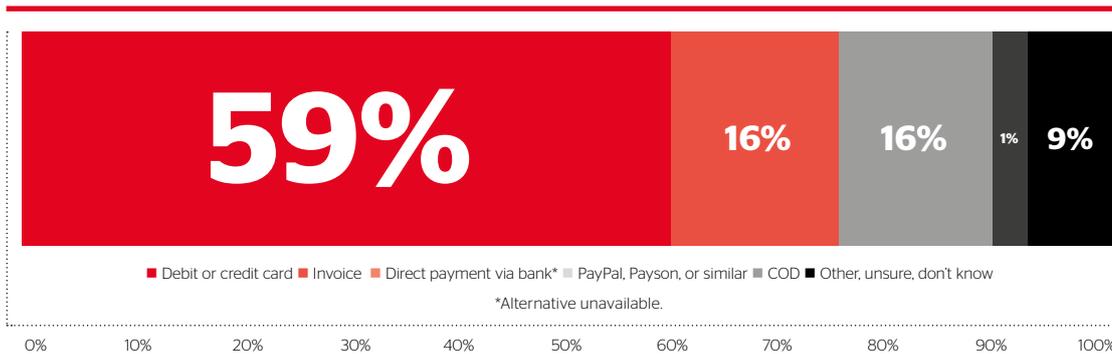




**PayPal and similar services are more popular than in other countries**

>> Which of the following methods do you prefer when paying for a product purchased online? (Q4, %)

Base: Have made purchases online during the quarter



**Almost as many draw the line at five as at three business days**

>> When you order a product online, what are your expectations concerning the delivery time, i.e. what is the maximum number of days you are prepared to wait to receive your goods? (Q1, %)

Base: Have made purchases online during the quarter



## Finland

» Population (18-79 years)	<b>4,118,784</b>
» Percentage of population with access to the Internet	<b>97%</b>
» Percentage of population who shop online at least once a year <sup>1</sup>	<b>79%</b>
» Percentage of population who shop online at least once a month <sup>1</sup>	<b>18%</b>
» Percentage of population who buy online from international retailers <sup>2</sup>	<b>49%</b>
» Average purchase amount per online shopper, per quarter (EUR)	<b>249</b>
» Average maximum number of business days consumers are prepared to wait for deliveries <sup>3</sup>	<b>4.4</b>

<sup>1</sup> Average Q1, Q2, Q4; Base: Entire population aged 18-79 years

<sup>2</sup> Average Q1-Q4; Base: Have made purchases online during the quarter

<sup>3</sup> Q1

# Large percentage who purchase online from abroad

## The largest buyers of clothing and footwear among Nordic consumers

Seventy-nine percent of Finns shop online at least once a year, which is a somewhat lower percentage than among their Nordic neighbors. Conversely, the proportion of consumers who buy goods online from abroad is high in Finland – a full 49 percent. Each Finnish consumer spends an average of EUR 249 per quarter on e-commerce. Finland’s shopping preferences are similar

to those of the other Nordic countries, except that the car, boat, and motorcycle accessory category is somewhat more popular in Finland than elsewhere in the Nordics.

## Germany is no. 1

When it comes to shopping abroad, Finnish consumers’ preferences differ from the rest of the Nordic region. Germany is the Finns’ favorite country to buy from, with the UK in second place. It is interesting to note that, in Finland, it is more popular to buy from Sweden than from the US.

**\$ Total amount Finns estimate spending on online purchases in 2015 (EUR bn):**

**2.6**

**Of which, purchases from abroad:**

**33%**

**Top five most popular countries from which Finns buy**

- Germany - 31%
- UK - 27%
- China - 20%
- Sweden - 19%
- USA - 15%

Responses to the question "From which foreign countries have you purchased goods online in the past three months?" (average Q1-Q4); Base: Have purchased goods online from abroad during the quarter

**Percentage who did research online before buying in-store**

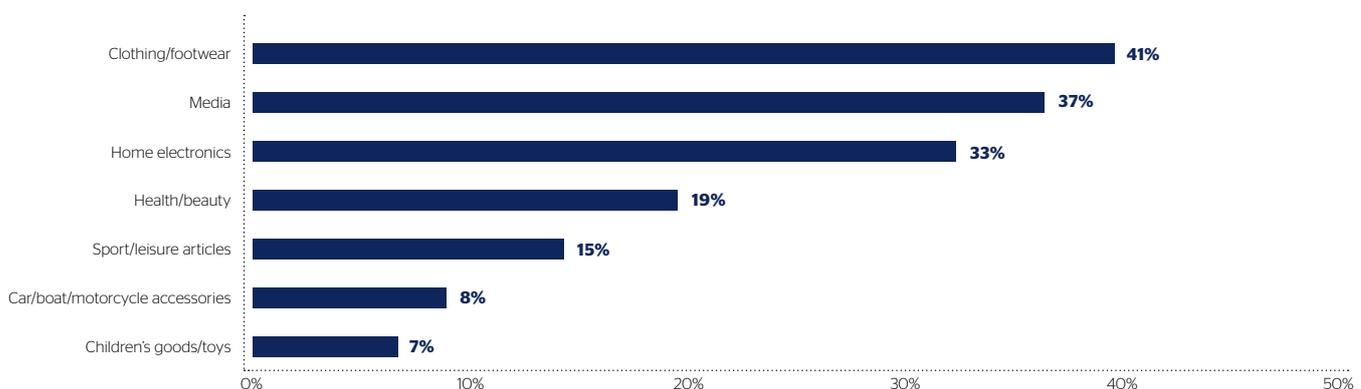
**45%**

**Percentage who did in-store research before buying online**

**9%**

Responses to the question: "In the past three months, have you first done research online about a product that you later bought in a store?" and "In the past three months, have you first looked at/tried out a product in a store that you then bought online?" (both averages Q1, Q2, Q4); Base: Have made purchases online during the quarter

>> **What types of goods have you bought online in the past three months?** (average Q1-Q4, %)   
 Base: Have made purchases online during the quarter



# Four out of ten shop online once a year

Thirty-seven percent say that they shop online at least once per quarter. A lower proportion, nine percent, shop online once a month. Overall, the percentage of Finnish consumers who shop online more than once a month is lower than in the other Nordic countries.

The majority of Finns prefer to pay using a debit card or via invoice, although many others prefer to pay directly via a bank. Ten percent like to use PayPal, Payson, or similar services.

On average, Finns are willing to wait up to 4.4 business days for their parcels. Thirty-two percent say that they are prepared to wait five business days for their deliveries. A full 19 percent are willing to wait for shipments for six business days or more, which is the highest proportion among the surveyed countries.

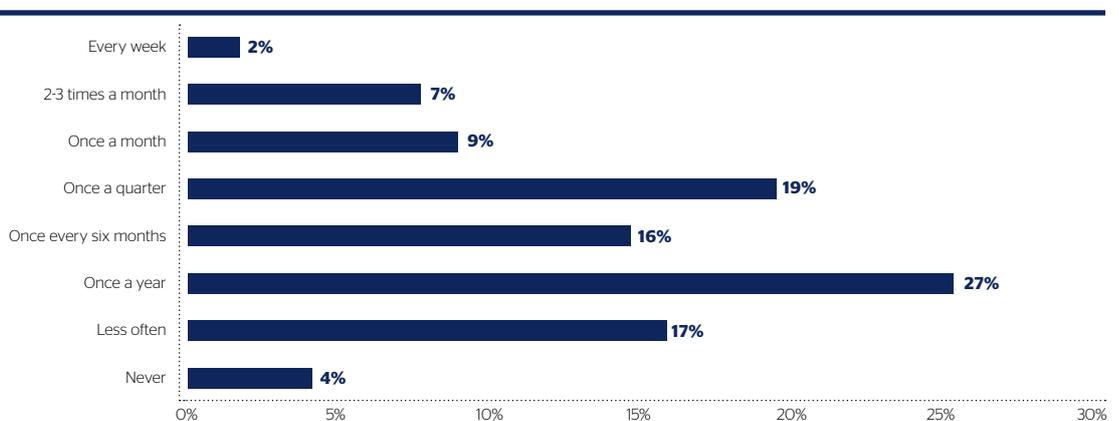
“Finnish consumers are looking for lower prices and a broader range when they shop online. That’s why the proportion of purchases from abroad is high.”

**Jouni Lamberg, Vice President Sales, Marketing & E-Commerce, PostNord Finland**

## Most consumers buy only once a year

>> [Approximately how often do you buy goods online?](#) (average Q1, Q2, Q4, %)

Base: Entire population aged 18-79 years

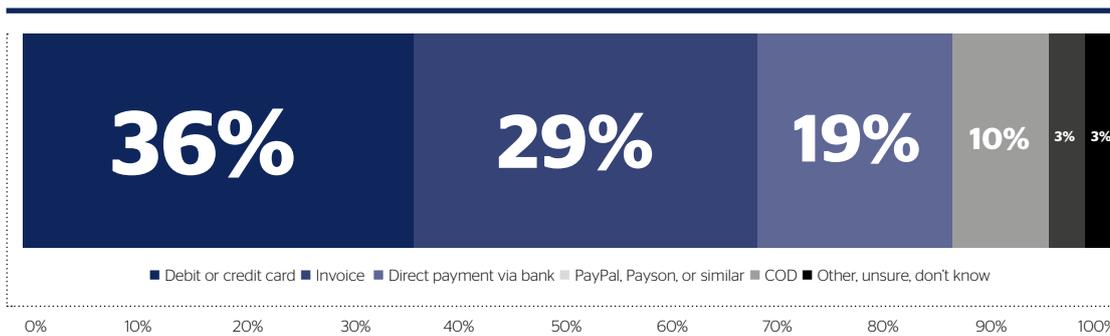




### Cards, invoices, and direct payments are preferred

>> Which of the following methods do you prefer when paying for a product purchased online? (Q4, %)

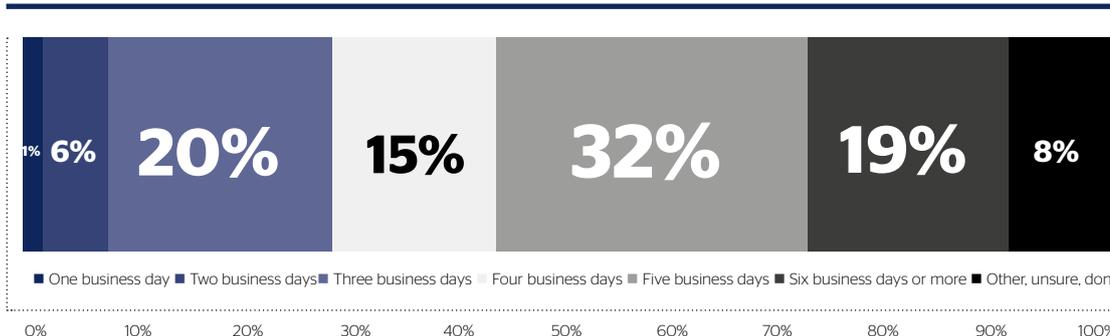
Base: Have made purchases online during the quarter



### The most patient Nordic consumers

>> When you order a product online, what are your expectations concerning the delivery time, i.e. what is the maximum number of days you are prepared to wait to receive your goods? (Q1, %)

Base: Have made purchases online during the quarter



# Detailed results

## Basic data

### Population (18-79 years) in the Nordic countries

Source: Statistics Sweden, Statistics Norway, Statistics Denmark, Statistics Finland, 2014

Sweden	7,262,665
Denmark	4,250,412
Norway	3,819,761
Finland	4,118,784

### Percentage of population with access to the Internet

Source: Internet World Stats, 2015/PostNord

Sweden	95%
Denmark	97%
Norway	97%
Finland	97%

### Population (18-79 years) with access to the Internet

Calculated as the country's population aged 18-79 years, multiplied by the country's Internet penetration

Sweden	6,899,532
Denmark	4,122,900
Norway	3,705,168
Finland	3,995,220

## Total e-commerce during 2015 (total Q1-Q4)

Calculated based on the respondents in each country's average response to the question "What total amount do you estimate that you have spent purchasing products online in the past three months?"

Base: Have made purchases online during the quarter

	Sweden	Denmark	Norway	Finland	Nordics
Total, national currency	SEK 61,391 m	DKK 26,971 m	NOK 38,786 m	EUR 2,608 m	-
Total, EUR	EUR 6,494 m	EUR 3,614 m	EUR 4,378 m	EUR 2,608 m	EUR 17,094 m
Average per person and quarter, EUR	EUR 313	EUR 291	EUR 369	EUR 249	-

## How often Nordic residents shop online (average Q1, Q2, Q4)

### Approximately how often do you buy goods online?

Base: Entire population aged 18-79 years

	Sweden	Denmark	Norway	Finland	Nordics
Every week	2%	2%	2%	2%	2%
2-3 times a month	9%	12%	14%	7%	10%
Once a month	25%	26%	22%	9%	21%
Once a quarter	27%	26%	25%	19%	25%
Once every six months	11%	15%	14%	16%	14%
Once a year	11%	7%	7%	27%	13%
Less often	7%	6%	9%	17%	9%
Never	6%	5%	6%	4%	5%
Unsure, don't know	0%	1%	1%	0%	0%

### Main advantage of shopping online (Q4)

#### Which is the single most important advantage of purchasing goods online as opposed to in a traditional store?

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
I can shop when it suits me	24%	31%	31%	26%	27%
Cheaper	24%	19%	20%	27%	23%
Larger and better range	17%	12%	16%	22%	17%
Saves time	12%	9%	10%	8%	10%
More convenient	17%	8%	7%	5%	11%
Other, unsure, don't know	6%	21%	15%	12%	12%

### Categories of goods bought by Nordic online shoppers (average Q1-Q4)

#### Which types of goods have you purchased online during the past three months? (Multiple answers possible)

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Clothing/footwear	40%	37%	37%	41%	39%
Home electronics	29%	30%	32%	33%	30%
Media	43%	32%	38%	37%	38%
Car/boat/motorcycle accessories	7%	6%	7%	8%	7%
Children's goods/toys	11%	12%	8%	7%	10%
Sport/leisure articles	13%	15%	18%	15%	15%
Health/beauty	30%	21%	24%	19%	24%

### Percentage of people who shop online from abroad (average Q1-Q4)

#### Have you purchased goods online from abroad at any time during the past three months? By "abroad" is meant that you perceive the online store's domicile to be outside of your country and/or that the delivery comes from another country. (Percentage who answered yes)

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Yes	32%	36%	50%	49%	40%

### Total e-commerce from abroad (total Q1-Q4)

#### Calculated based on the respondents in each country's average response to the question "What total amount do you estimate that you have spent purchasing products online from international sites in the past three months? By 'international sites' is meant that you perceive the online store's domicile to be outside of your country and/or that the delivery comes from another country."

Base: Have purchased goods online from abroad during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Total, national currency	SEK 12,000 m	DKK 6,029 m	NOK 11,406 m	EUR 861 m	-
Total, EUR	EUR 1,270 m	EUR 808 m	EUR 1,287 m	EUR 861 m	EUR 4,226 m

### Categories of goods bought by Nordic online shoppers from abroad (average Q1-Q4)

#### Which types of goods have you purchased online from abroad during the past three months? (Multiple answers possible)

Base: Have purchased goods online from abroad during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Clothing/footwear	31%	27%	29%	38%	31%
Home electronics	17%	21%	23%	23%	20%
Media	14%	22%	24%	18%	19%
Car/boat/motorcycle accessories	9%	6%	6%	8%	7%
Children's goods/toys	5%	6%	7%	4%	5%
Sport/leisure articles	12%	14%	11%	13%	12%
Health/beauty	11%	12%	17%	11%	12%

Nordic consumers' favorite foreign countries to buy from online (average Q1-Q4)

**From which foreign countries have you purchased goods online in the past three months? By "foreign country" is meant the country that you perceive to be the online store's country of domicile. (Multiple answers possible)**

Base: Have purchased goods online from abroad during the quarter	Sweden	Denmark	Norway	Finland	Nordics
United Kingdom	34%	46%	38%	27%	36%
USA	24%	18%	36%	15%	23%
Germany	27%	30%	13%	31%	25%
China	24%	18%	31%	20%	23%
Sweden	-	13%	20%	19%	17%*
Denmark	7%	-	13%	3%	7%*
Norway	2%	1%	-	2%	2%*
Finland	1%	0%	0%	-	1%*

\*These weighted averages exclude the country in question and, as such, reflect the relevant percentage of consumers in the other Nordic countries.

Percentage of people who have shopped online using mobile devices (average Q1, Q2, Q4)

**Which devices have you used to purchase goods online in the past three months? (Multiple answers possible)**

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Cell phone	21%	12%	16%	12%	16%
Tablet	21%	25%	24%	15%	21%

Proportion of people who first looked at/tried out a product in a store that they then bought online (average Q1, Q2, Q4)

**During the past quarter, have you first looked at/tried out a product in a store and later bought it online? (Percentage who answered yes)**

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Yes	17%	9%	12%	9%	12%

Categories of goods purchased online in this way (average Q1-Q4)

**In the past three months, which types of products have you first looked at/tried in a store before purchasing them online? (Multiple answers possible)**

Base: Have purchased goods online from abroad during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Clothing/footwear	45%	42%	38%	53%	45%
Home electronics	17%	23%	22%	32%	22%
Media	15%	11%	11%	16%	14%
Car/boat/motorcycle accessories	2%	1%	1%	10%	3%
Children's goods/toys	4%	0%	2%	5%	3%
Sport/leisure articles	13%	14%	18%	25%	17%
Health/beauty	12%	10%	11%	3%	9%

Percentage of people who first researched a product online before purchasing it in a physical store (average Q1, Q2, Q4)

**In the past three months, have you first done research online about a product that you later bought in a store? (Percentage who answered yes)**

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Yes	54%	42%	51%	45%	49%

### Categories of goods purchased online in this way (Q4)

**In the past three months, which types of products have you first done research on online before purchasing them in a store? (Multiple answers possible)**

Base: In the past three months, have first done research online about a product which was then purchased in a store	Sweden	Denmark	Norway	Finland	Nordics
Clothing/footwear	26%	22%	23%	26%	25%
Home electronics	41%	30%	48%	48%	41%
Media	17%	19%	19%	20%	18%
Car/boat/motorcycle accessories	4%	7%	5%	12%	7%
Children's goods/toys	7%	10%	8%	10%	8%
Sport/leisure articles	11%	13%	24%	17%	15%
Health/beauty	15%	12%	11%	16%	14%

### Expectations concerning delivery time (Q1)

**When you order a product online, what are your expectations concerning the delivery time; i.e. how many days are you willing to wait, at most, to receive your goods?**

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
One business day	1%	2%	1%	1%	1%
Two business days	12%	21%	7%	6%	12%
Three business days	32%	36%	26%	20%	29%
Four business days	13%	12%	19%	15%	14%
Five business days	27%	14%	25%	32%	25%
Six business days or more	8%	6%	13%	19%	11%
Unsure, don't know	7%	8%	10%	8%	8%
Average number of days	3.9	3.4	4.1	4.4	3.9

### Preferred delivery methods (Q1)

**When you purchase a product online and have the opportunity to choose how it will be delivered, how do you generally prefer to receive it?**

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
I want it delivered to my workplace	2%	9%	4%	1%	4%
I want it delivered to my home in the evening when it suits me, even if it costs extra	3%	4%	4%	3%	3%
I want it delivered to my home when I am at home during the day	10%	19%	8%	11%	12%
I want to collect it myself from the online store's physical store or warehouse	1%	1%	2%	3%	2%
I want to collect it myself from my local partner outlet/service point	48%	20%	52%	48%	43%
I want it delivered to my mailbox by the mail carrier	31%	9%	25%	14%	21%
I want to collect it myself from a parcel machine that is open 24 hours	2%	15%	2%	13%	7%
I want it delivered to my address, e.g. left in my garage	-	18%	-	-	-
Unsure, don't know	3%	4%	4%	6%	4%

### Preferred payment methods (Q4)

#### Which of the following methods do you prefer when paying for a product purchased online?

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Debit card or credit card	35%	83%	59%	36%	50%
Invoice	35%	4%	16%	29%	23%
Direct payment via a bank	19%	1%	-	19%	11%
PayPal, Payson, or similar	7%	6%	16%	10%	9%
COD	1%	4%	1%	3%	2%
Other, unsure, don't know	1%	3%	9%	3%	3%

### Percentage of people who have returned a shipment (Q1)

#### In the past three months, have you returned a product that you bought online? (Percentage who answered yes)

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Yes	17%	14%	12%	17%	15%

### Importance of clear returns procedures (Q2)

#### How important is the following in connection with delivery when you decide which online store/site you will buy a product from?

##### That clear information is given on procedures for returns

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Very important	55%	52%	48%	43%	50%
Quite important	37%	39%	38%	43%	39%
Not very important	6%	8%	10%	11%	8%
Not important at all	1%	0%	2%	2%	1%
Unsure, don't know	1%	1%	3%	2%	2%

### The importance of free returns (Q2)

#### How important is the following in connection with delivery when you decide which online store/site you will buy a product from?

##### That returns are free of charge

Base: Have made purchases online during the quarter	Sweden	Denmark	Norway	Finland	Nordics
Very important	44%	47%	42%	41%	44%
Quite important	40%	40%	36%	36%	38%
Not very important	13%	10%	15%	17%	14%
Not important at all	1%	1%	4%	3%	2%
Unsure, don't know	2%	2%	3%	2%	2%



# PostNord—your e-commerce partner

PostNord is the leading supplier of communication and logistics solutions to, from, and within the Nordic region. We also manage the postal service to households and businesses in Sweden and Denmark. Through our expertise and strong distribution network, we are laying the groundwork for tomorrow's communication, e-commerce, and logistics in the Nordic region. In 2015, the PostNord group had 35,000 employees and sales of around SEK 40 billion.

PostNord is both the largest and preferred choice of partner for e-commerce in the Nordic market. Our comprehensive offering includes a host of services within products distribution, marketing, and customer communication.

We make everyday life easier for e-commerce companies. With a coordinated, Nordic-customized service offering within logistics and the broadest distribution network in the region, we help bring e-retailers and end-customers closer together. PostNord has around 6,000 distribution points evenly spread across Sweden, Denmark, Norway, and Finland. In Sweden and Denmark, our mail carriers also visit every household and business each business day.

PostNord is also active beyond the Nordic region through its subsidiary company Direct Link, which offers distribution solutions to countries all over the world. Direct Link helps e-commerce companies from around the globe to do business in the Nordic market by offering everything from market analysis and direct marketing to fulfilment, products distribution, and returns processing.

Find out more at [www.postnord.com](http://www.postnord.com) and [www.directlink.com](http://www.directlink.com).



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