

E-commerce in Europe 2015



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About this report

» Since 2014 PostNord has been conducting surveys of the European e-commerce market under the title E-commerce in Europe. The report is based on interviews with more than 11,000 consumers, conducted with private individuals in the age group 15-79 in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the United Kingdom, constituting a representative selection from each country. The survey was performed by the research company Nepa. The number of respondents varies somewhat between the countries; in most countries more than 1,000 people responded. The Nordics are an exception, where the countries are reported as one cohesive region, within which the number of respondents totaled about 600 per country.

Country	BE	DK	FI	FR	IT	NL	NO	PL	ES	GB	SE	DE
Respondents	1,201	616	592	1,189	1,144	1,243	593	1,111	1,118	1,150	626	1,124

As the survey was conducted online, the responses were recalculated on the basis of the level of Internet penetration that existed in each country in June 2014. This is important, not least because Internet penetration varies significantly between the different European countries. To calculate how many consumers shop online in each market, we used Eurostat's population statistics for 2014 as a basis. To calculate the average purchase in euros, we applied the exchange rates from May 24, 2015 (and from January 1, 2013 for the comparative data). For more information about the methodology, please see the detailed results section in the report.

The report contains combined results for the Nordics (the Northern European region consisting of Denmark, Finland, Iceland, Norway and Sweden). However, the smallest country in the region, Iceland, is not included in the survey. E-commerce is defined in this context as the purchase of physical products via the Internet. This means that online purchases of services (e.g. travel, hotels and tickets) and downloads (e.g. music files, films and applications) are not included.

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

E-commerce market increasingly international

European e-commerce is continuing to grow, and consumers are becoming increasingly mature in their purchasing behavior. This is shown by the fact that more and more Europeans regularly shop online and spend a higher average amount than before. One clear sign is that the commerce between countries, both within and outside Europe, is growing very rapidly. E-commerce from abroad creates new opportunities that give consumers access to a wider range of products, more brands, better offers and lower prices. This trend constitutes major opportunities for e-commerce companies that wish to establish themselves in Europe.

This report describes the e-commerce habits and preferences of European consumers, based on a survey conducted in 12 countries.* In total, consumers in these markets spent nearly EUR 180 billion on online shopping last year, which is about EUR 10 billion more than in the previous year.

Everything indicates that European e-commerce will continue to grow. The most mature markets in the survey are the Nordics,** the United Kingdom and Germany. These countries have the highest level of Internet penetration and the highest proportion of consumers who have shopped online. However, in countries where the level of Internet penetration is low, relatively many people have also shopped online at some point. As Internet use in these markets can be expected to increase, and thereby also e-commerce, we see further opportunities for very strong growth. This applies above all to markets such as Italy, Spain and Poland.

In addition, the growth potential is substantial in many product categories. The most popular e-commerce products are currently clothes and footwear, home electronics and books. The more accustomed we become to shopping online, the more types of products we buy online. This trend is also clear in other major markets - not least the US market.

The report shows both similarities and differences between the countries. Understanding your local e-commerce market is a crucial success factor. One clear similarity is the types of products that Europeans prefer to buy online. There are however, also many key differences. People set different demands on delivery times, and the preferences regarding how to pay for products vary between the markets. Knowledge of local conditions is an important prerequisite for success.



Håkan Ericsson
President and Group
CEO PostNord

“Everything indicates that European e-commerce will continue to grow.”

PostNord can help in this respect. Through our subsidiary Direct Link, we help e-tailers worldwide establish a presence in new markets. We manage everything from market analysis and direct marketing to fulfillment, product distribution and returns processing. PostNord is the obvious business partner for e-commerce to, from and within the Nordics. We know the Nordic market better than anyone else. Furthermore, we have the region's broadest distribution network and a comprehensive offering in the areas of customer communication and logistics.

At PostNord we are pleased to have the opportunity to share our knowledge and experience, and our aim with this E-commerce in Europe report is to present you with current market trends, good advice, tips and inspiration for future establishment or expansion of your e-commerce to and from the Nordics and Europe.

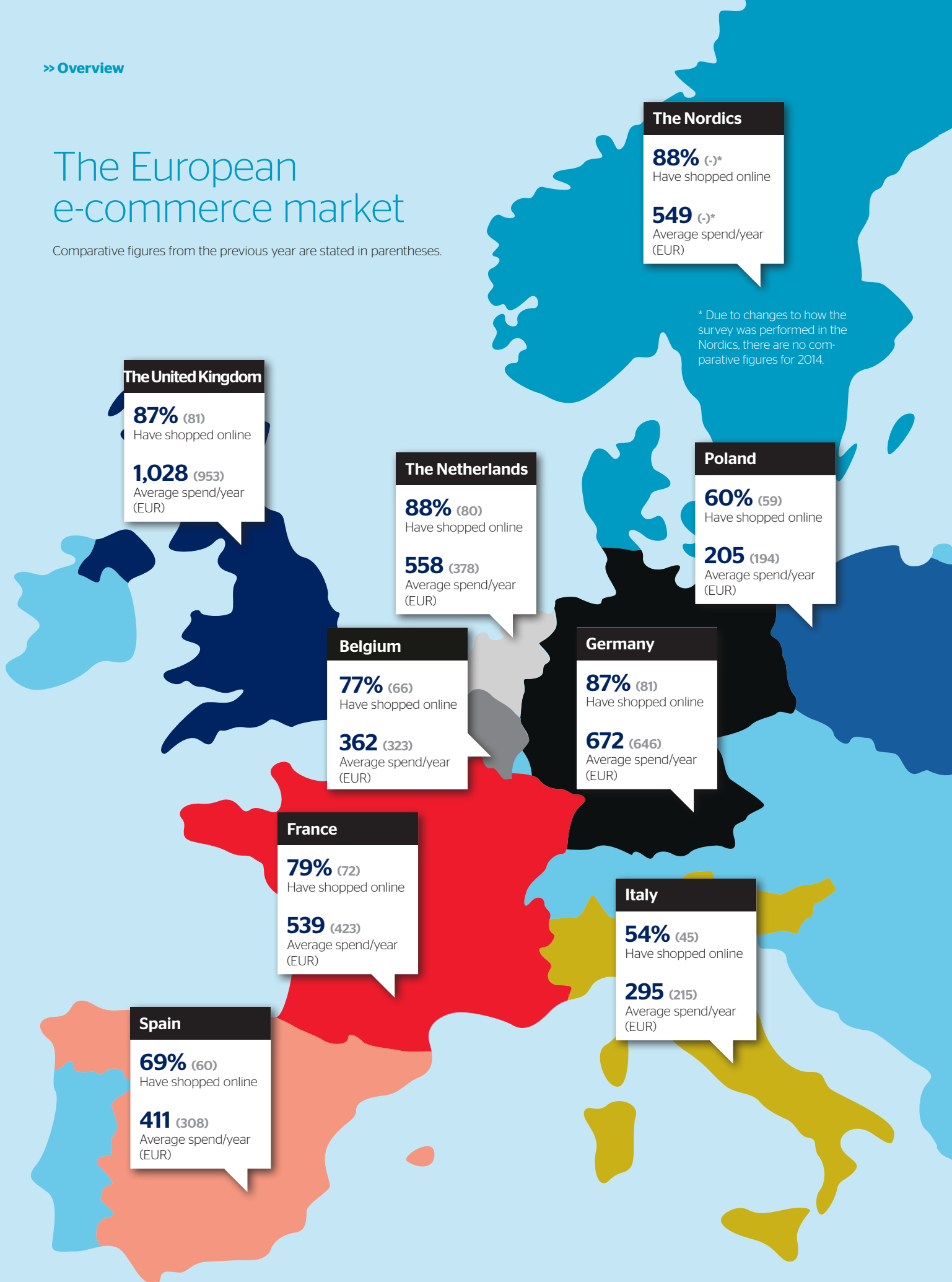
Håkan Ericsson
President and Group CEO
PostNord

*Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the United Kingdom

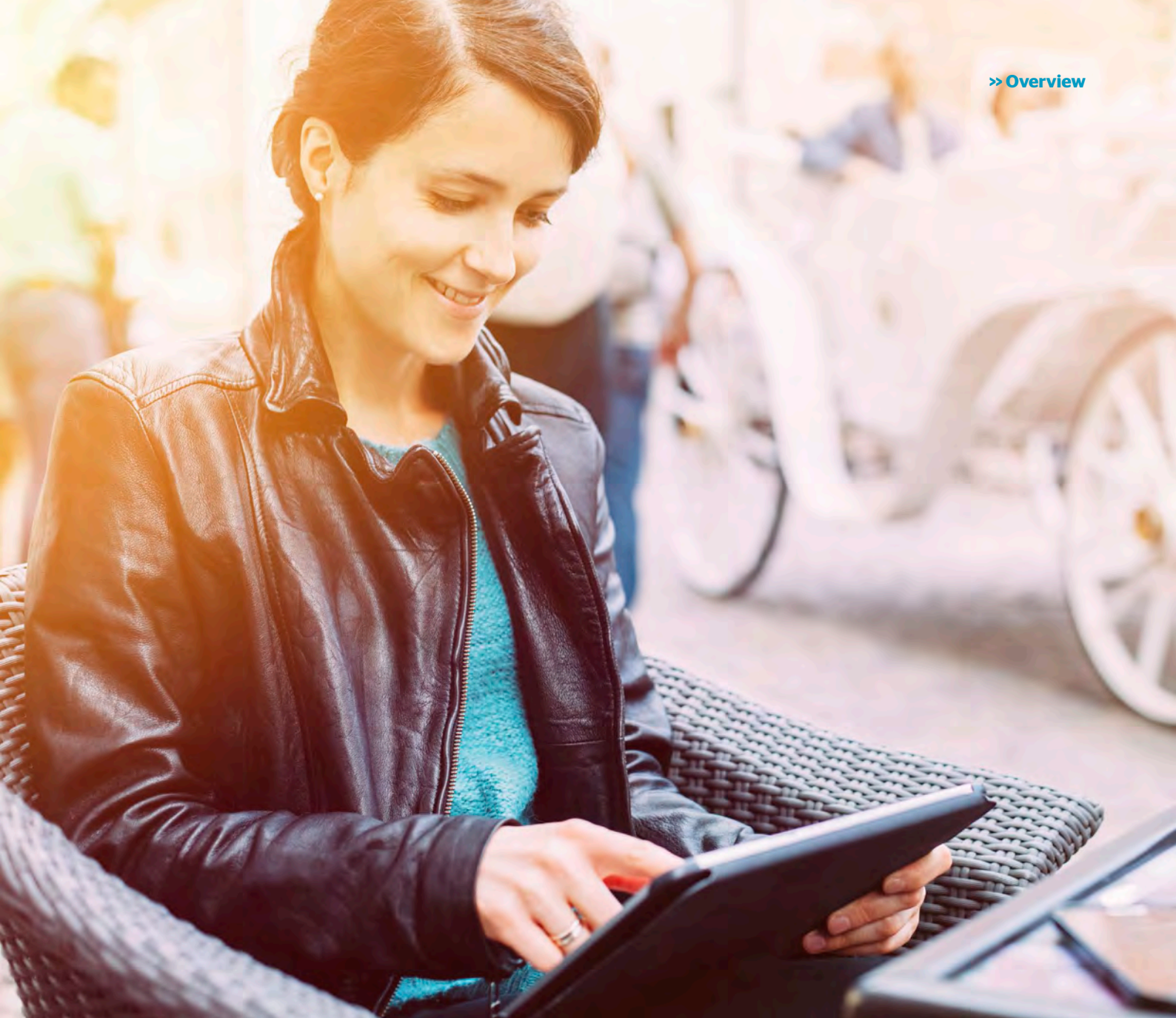
**Denmark, Finland, Norway and Sweden

The European e-commerce market

Comparative figures from the previous year are stated in parentheses.



* Due to changes to how the survey was performed in the Nordics, there are no comparative figures for 2014.



In the surveyed markets...

247

Million consumers have shopped online.

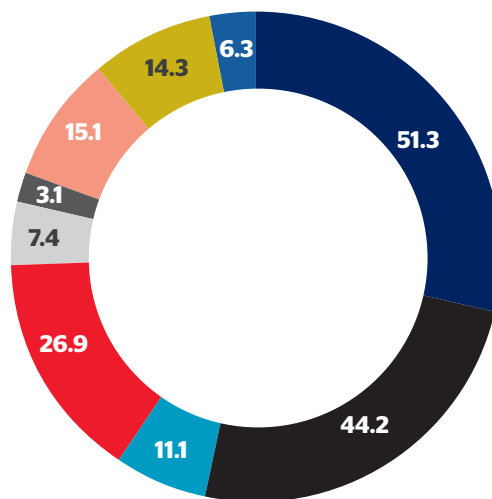
159

Million consumers have shopped online from abroad.

180

Billion euros were spent by Europeans on online shopping during 2014.

E-commerce sales 2014 (EUR billions)



■ United Kingdom ■ Germany ■ Nordics ■ France
■ Netherlands ■ Belgium ■ Spain ■ Italy ■ Poland



“The key is to have a local approach and work with the right people.”

“Cross-border trade will increase.”

Arne Andersson, e-commerce expert at PostNord, comments on the results of the survey and advises e-tailers who want to succeed in Europe.

E-commerce is growing, and cross-border e-commerce in particular is growing strongly. Why is this?

We are no longer scared of buying from other countries. We have previously displayed slightly “country-centric” behavior as national borders have been highly significant in various contexts, but this has loosened up through globalization. Today many of us feel that it is just as natural to shop online as in a physical store, even when we buy products online from abroad. In addition, consumers want to discover new things, which is possible through purchases from abroad – not least as you gain access to a much wider range of products. I think that cross-border trade will increase in the future. Especially when more and more Europeans gain access to fast Internet connections.

At present Europeans buy a very large amount of clothing and footwear, home electronics and books online. Why?

This is largely because these products have a very strong tradition of being available through distance selling, for example using mail order. We are therefore already comfortable with buying such items in a different way than we do in physical stores. Furthermore, returns processing is becoming increasingly easy, which drives online sales of clothing and footwear in particular. These categories will continue to be quite significant in the future.

What will Europeans buy online in the future?

Many Europeans are becoming so mature in terms of their online shopping behavior that we are going beyond the traditional product categories. Quite



5 tips

How to succeed with European exports



1. Laws and rules

Be aware of local rules and laws governing distance selling, marketing and handling personal data.



2. Website adjustments

Look at and compare your site with those of your competitors. Engage professional translators, who reside in each country concerned, when translating the site into other languages.



3. Payment solutions

Different markets have different payment preferences. Find out how customers in the country want to pay and enable various solutions. See page 12 for more information about payment preferences.



4. Deliveries and returns

Find a logistics operator that can take care of distribution in as many countries as possible. Make sure you have a simple, convenient way of processing returns. See page 14 for more information about processing returns.



5. Local adaptations

Survey local preferences and adapt your website accordingly. Make sure that customer service speaks the customer's language and can be contacted on a local phone number.

simply, we are discovering that shopping for additional types of products online is convenient. In the slightly longer term this will lead to the different product categories leveling out, in the sense that we will shop online more for most types of products. Two examples of categories that are expanding are cosmetics, skincare and haircare, and building materials.

What should e-tailers bear in mind in order to succeed in Europe?

Local is the key word. Analyze the market in which you intend to start doing business. Look at both your target group and your competitors. Survey consumers' behaviors and preferences. Ensure that you are offering payment solutions and delivery options that suit the market. But in order to succeed in creating the right "feeling" in the webshop, the most crucial task is to develop the local version together with people who live in the country. One mistake that we often see is that the website is translated with the help of a translator who no longer lives in the country. As language constantly develops, the feeling and tone are often wrong even though the words may be correct. So, the key is to have a local approach and work with the right people.



Arne Andersson

E-commerce expert at PostNord.



Clothes and footwear dominate in nearly all countries

Similar preferences

Europeans agree completely on one point: in all countries the products that we buy online most often are clothing and footwear, home electronics and books. This dominance is partly because these products have a strong tradition of being sold by mail order.

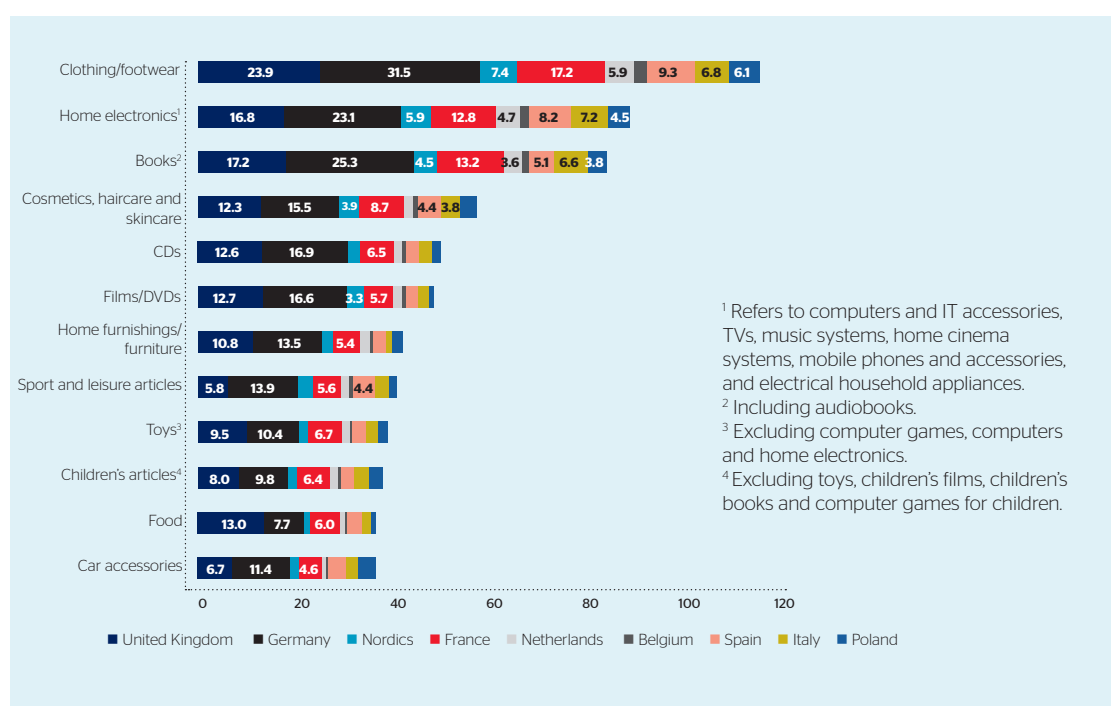
Online purchases of clothes and footwear are increasing, and the category is now at the top of the list in eight of the nine markets included in this survey. The list of best-selling products is largely the same as for last year, with the exception of home electronics, which have overtaken books as the second most popular product category. In Italy, the only country where clothes and footwear are not at the number one spot, consumers mainly purchase home electronics instead.

Future e-commerce products

As consumers become more accustomed to e-commerce, and thereby want to buy additional types of products online, many categories will grow. The categories currently on the rise include online food shopping, which is expanding particularly strongly. The British continue to be by far the largest number of online food shoppers, but a relatively large number of consumers in Germany and France also purchase food online.



>> Number who bought various product categories online in the past year (millions of people)



>> Product categories

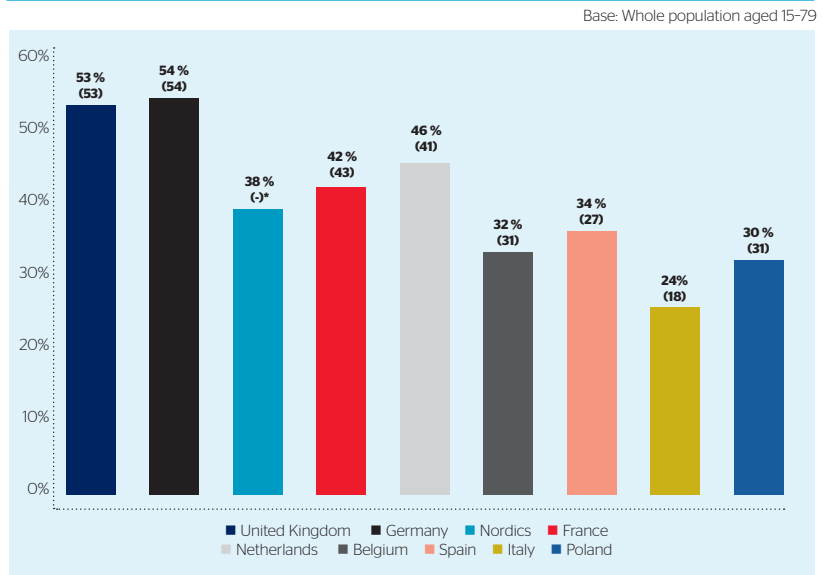


Best-selling products in most markets

Clothes and footwear are the most popular category in nearly all the markets included in the survey. British and German consumers are still those who buy clothes online the most: more than half of the consumers who had shopped online bought clothes or footwear. In Spain and Italy the proportion remains relatively low, but is growing considerably compared to last year.

>> Clothing/footwear

The proportion in each country who bought clothing/footwear online.

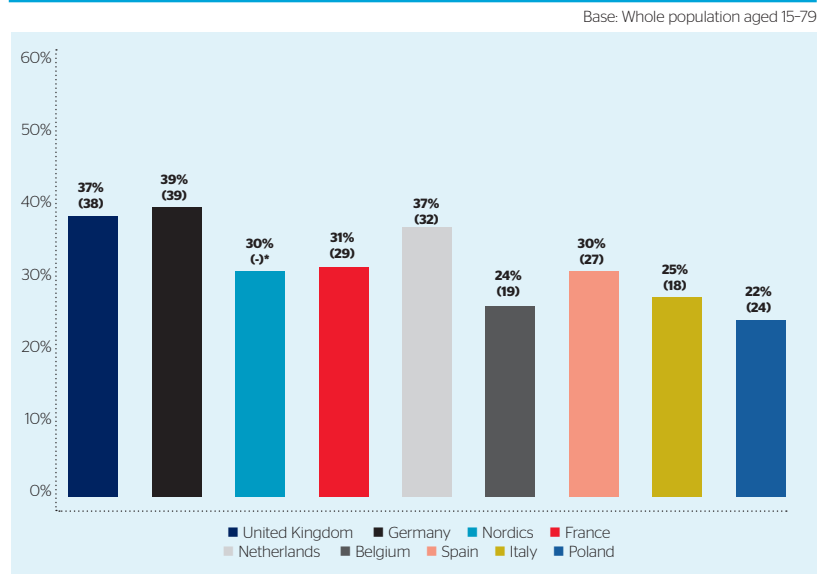


Now in second place

In most of the markets the proportion who buy home electronics online is relatively stable compared to last year. However, home electronics are now overtaking books as the second most popular product category in Europe. Purchasing home electronics online is particular popular in Germany, the Netherlands and the United Kingdom; nearly four out of ten people who have shopped online have bought an item in this category.

>> Home electronics

The proportion in each country who bought home electronics online.

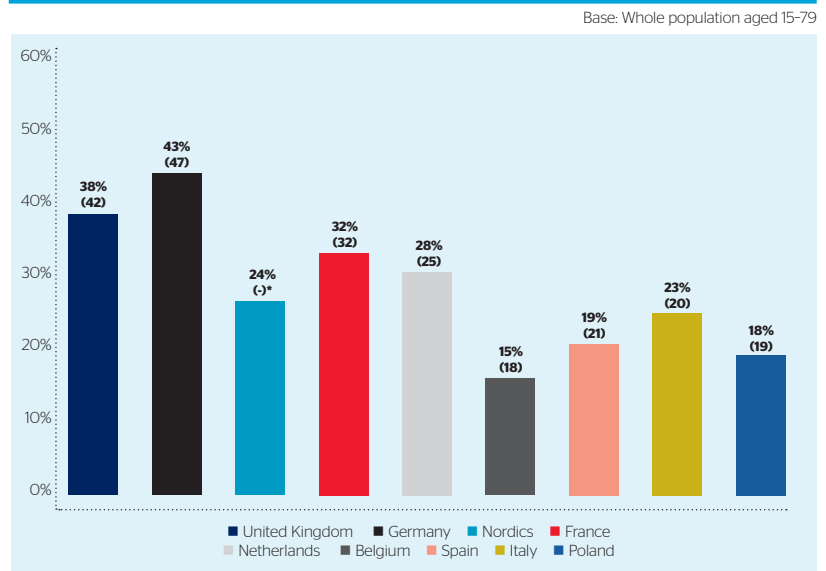


>> Books

The proportion in each country who bought books online.

Declining somewhat

Books are the third most popular category of products bought online in Europe. The proportion of people who bought books online is, however, declining to a certain extent in several of the markets, which causes the category to slip down one place on the list of best-selling products compared to last year.

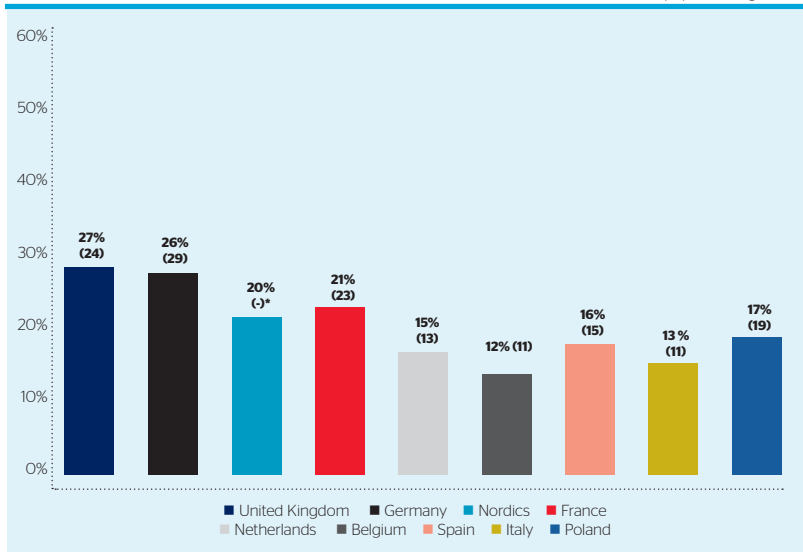


* Due to changes to how the survey was performed in the Nordics, there are no comparative figures for 2014.

>> Cosmetics, haircare and skincare

The proportion in each country who bought cosmetics, haircare and skincare online.

Base: Whole population aged 15-79



British top the list

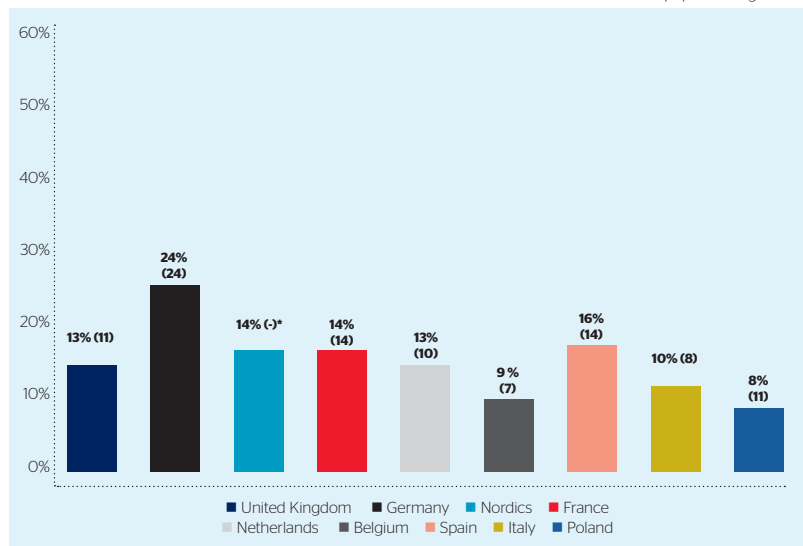
The proportion who buy cosmetics, haircare or skincare online is increasing in some markets such as the United Kingdom and Italy. It is however, decreasing somewhat in other markets, including Germany and France. The United Kingdom now tops the list as the country in which the largest number of people buy beauty products online.



>> Sport/leisure

The proportion in each country who bought sport/leisure products online.

Base: Whole population aged 15-79



Making steady progress

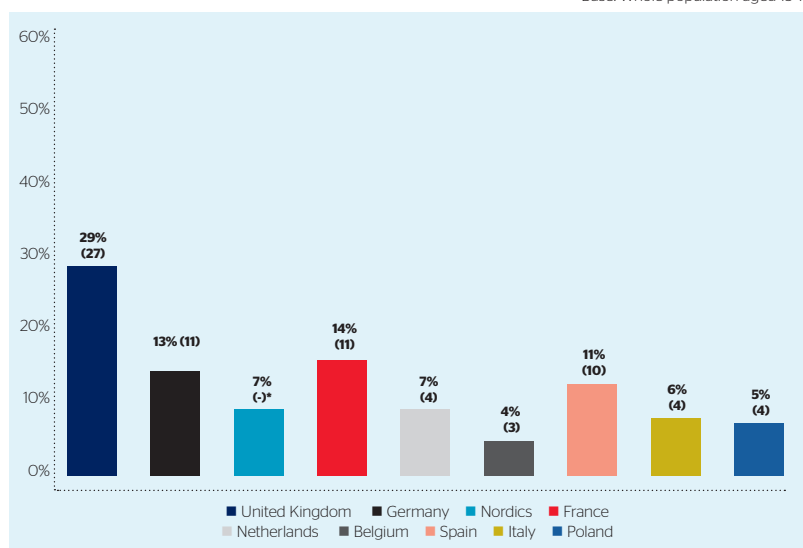
The sport and leisure category is growing in popularity somewhat in most markets, especially in the Netherlands. Germany is still in the lead; nearly one in four Germans who have shopped online have bought sport and leisure articles. Some countries are gaining ground however, especially Spain, the Netherlands and the United Kingdom.



>> Food

The proportion in each country who bought food online.

Base: Whole population aged 15-79

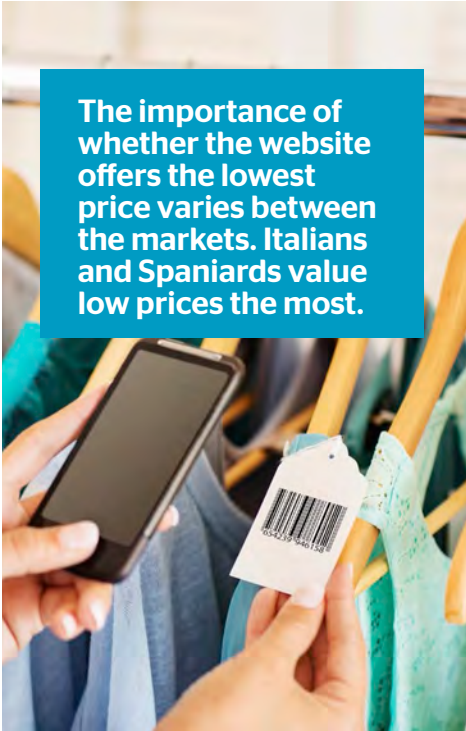


Increasing in all markets

The proportion who buy food online is rising in all markets compared to last year. The British are still by far the most mature in terms of food shopping online and the United Kingdom is in clear first place on the list. The proportion of people who buy food online is growing but remains relatively low in other markets. There is therefore great potential for growth in this category.



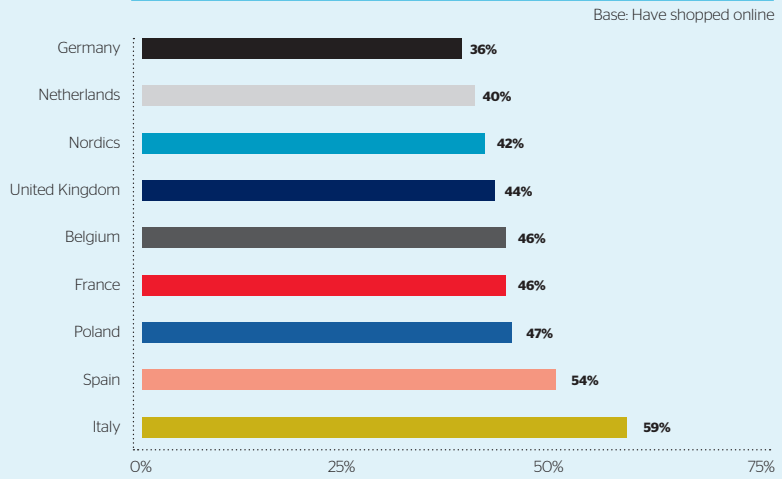
* Due to changes to how the survey was performed in the Nordics, there are no comparative figures for 2014.



The importance of whether the website offers the lowest price varies between the markets. Italians and Spaniards value low prices the most.

>> Importance of price level

The proportion who consider it very important that the lowest price is on offer if they are to buy from a website.



Local payment solutions are important

No clear trend

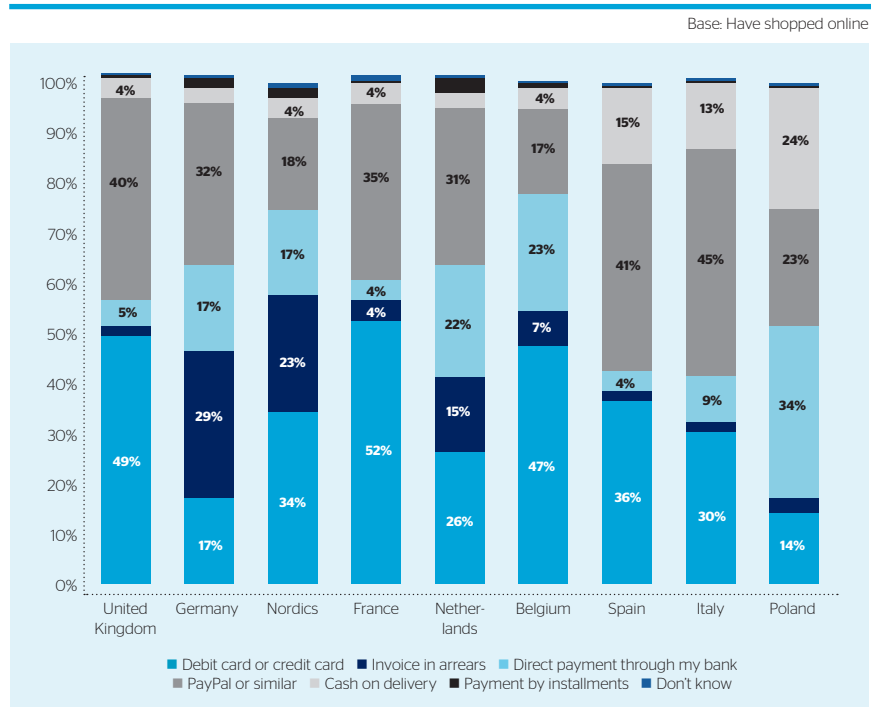
It is difficult to discern a clear trend for how European consumers want to pay. The variations between the markets are considerable. It is therefore very important to find out what local consumers prefer and to adapt payment solutions accordingly.

Varying preferences

Paying with a debit card or credit card is a popular option in most of the markets. This is particularly commonplace in France, the United Kingdom and Belgium, where consumers appear to have the highest level of trust that their card details will be handled securely. PayPal and similar payment solutions are popular in large parts of Europe, but not in the Nordics and Belgium, where only about a fifth use such services. In Poland and Germany other payment methods are also at the top of the list. In Poland, direct payment via banks is the most popular, followed by cash on delivery (COD). In Germany many people pay for their purchases by invoice in arrears.

>> Major differences between countries

Which of the following methods do you prefer to use when you pay for a product you have bought online?





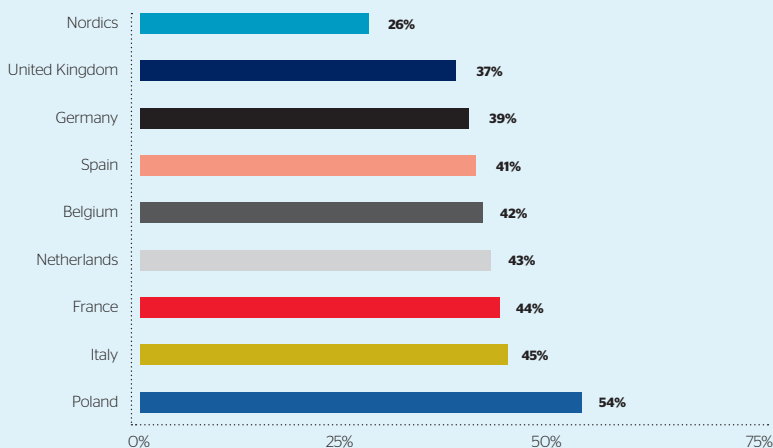
54%

The proportion of Poles who think that fast deliveries are very important if they are to shop online. This is the largest proportion in the survey.

>> Fast deliveries often important

The proportion who consider it very important that delivery is fast (max. three days) if they are to buy from a website.

Base: Have shopped online



Delivery requirements vary

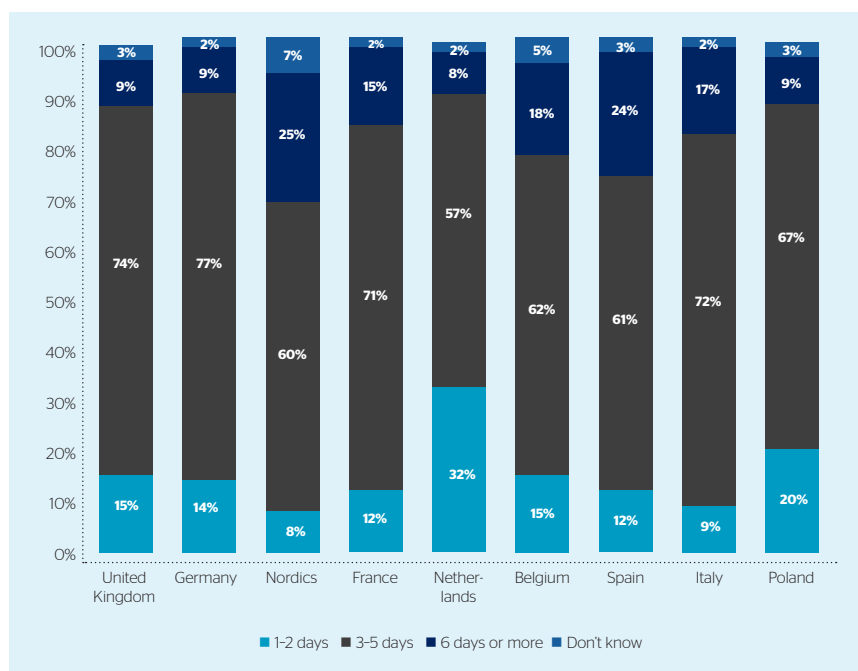
Differences between countries

The time that consumers are prepared to wait for their e-commerce deliveries varies between the European countries. The Dutch have high expectations: more than a third have stated that they want to receive their purchase within 1-2 days, a proportion that is twice as high as in the United Kingdom, Germany and Belgium, and three times as high as in the Nordics, France, Spain and Italy. To be a successful e-tailer it is important to analyze both the expectations of and conditions for fast deliveries in the relevant market.

>> Nordic residents have the most patience

When you order a product online, what are your expectations of the delivery time, i.e. how many days may it take at the most to receive the product?

Base: Have shopped online



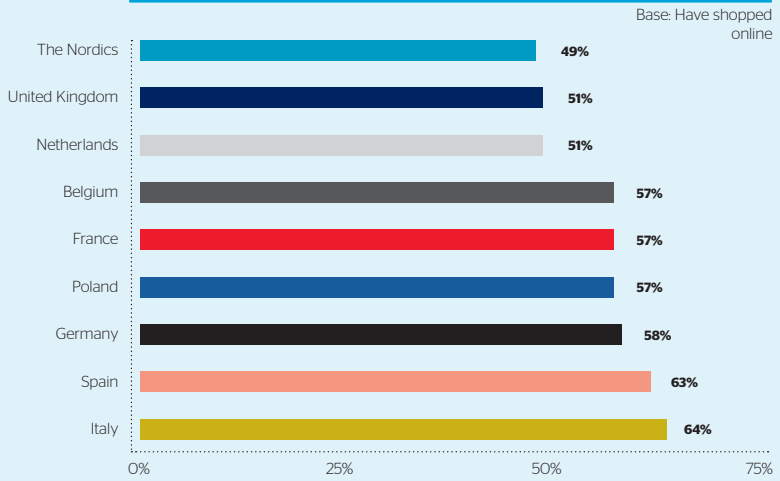
Patient consumers in the Nordics and Spain

Residents in the Nordic countries and Spain are the most patient: one in four are prepared to wait six working days or more for their deliveries. The most common by far, however, is 3-5 days.



Trouble-free returns processing is one of the most important criteria that affect Europeans' decisions about where they shop online.

>> A clear majority value simple returns processing.
The proportion who consider it very important to have a simple way of returning products if they are to buy from a website.



Trouble-free returns are important

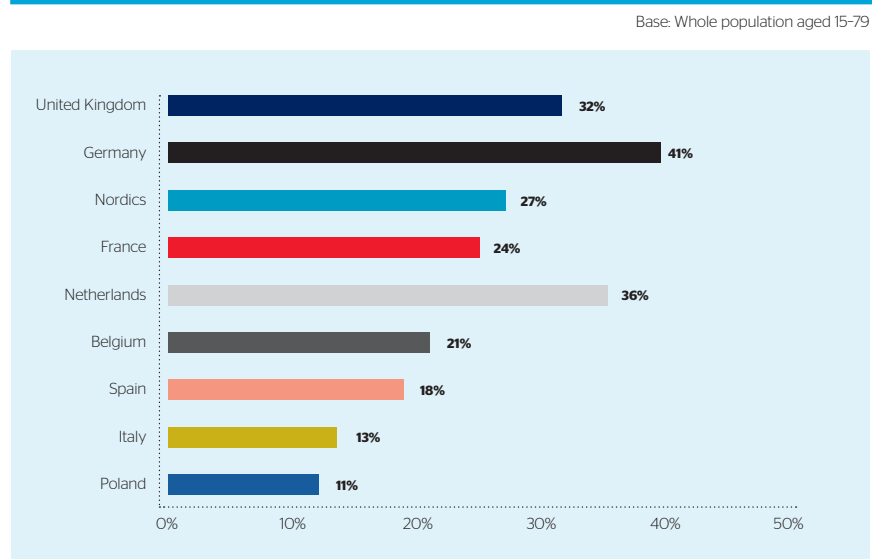
A competitive advantage

In all markets a very high proportion of consumers regard simple returns processing as an important factor for them to shop online. Spaniards and Italians rate this as the most important factor of all, although they currently do not return online purchases as often as the populations in other European countries.

Most common in mature markets

The proportion who have returned an item bought online varies widely between the markets. However, there is a clear trend of returns being more common in more mature markets; the proportion is highest in Germany, followed by the Netherlands and the United Kingdom. Irrespective of market, the by far most commonly returned products are clothes and footwear. Home electronics are in a distant second place.

>> Returns most common in Germany
Proportion who returned an item bought online during the past year





>> By far the items returned most are clothes

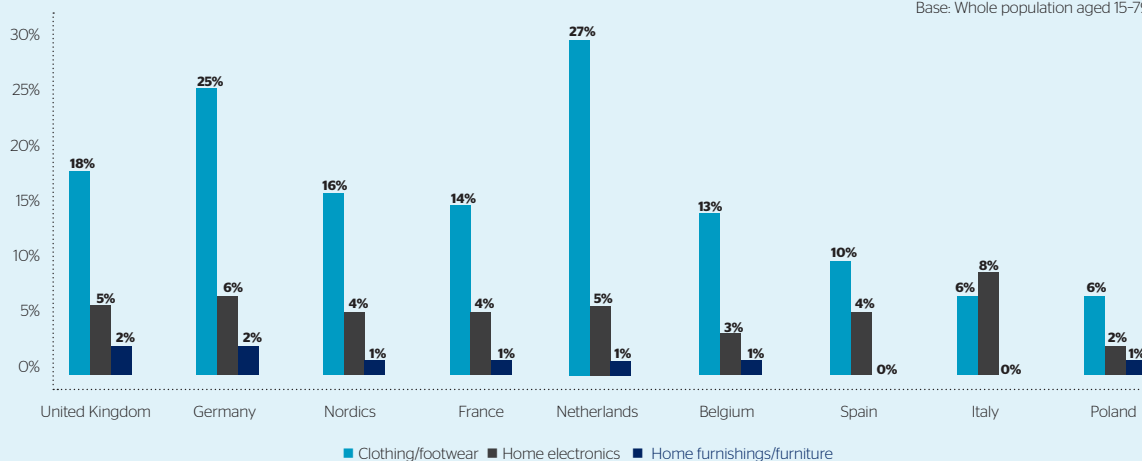
Number of millions of online consumers who have returned an item purchased online in the categories below



>> Clothes returns most common in Germany and the Netherlands.

Proportion who have returned an item bought online in the product category

Base: Whole population aged 15-79



E-commerce from abroad rising steadily

Thresholds becoming lower

Europeans' cross-border e-commerce is steadily increasing, both within Europe and beyond. Compared to last year, the number of Europeans who had at some time shopped online from abroad, rose by nearly 11 million, equivalent to 8%.* This is largely because consumers are becoming increasingly mature and accustomed to shopping online, from both domestic sellers and from abroad; to more and more people it feels just as natural as shopping in physical stores.

Another important driving force is the fact that by buying from abroad, consumers are gaining access to a wider product range, more brands, better offers and lower prices.

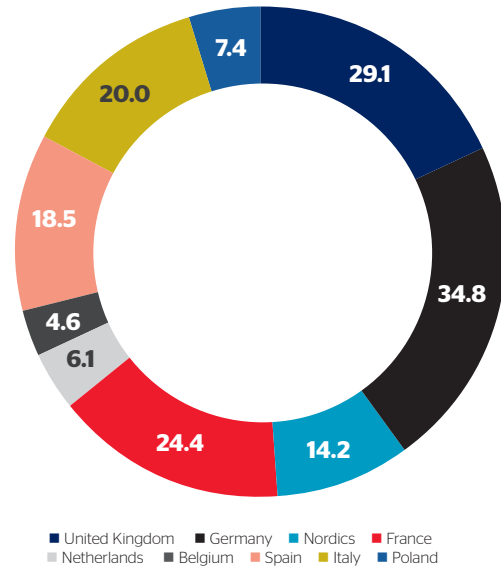
The Nordics have by far the highest proportion of consumers who have shopped online from abroad - no fewer than seven in ten.

Expected to grow even more

The level of Internet penetration remains comparatively low in a number of European markets, especially in Italy and Poland. As broadband infrastructure is expanded, e-commerce is expected to grow even more, including across national borders. There is therefore still substantial growth potential for commerce from abroad in Europe.

*Excluding the Nordics.

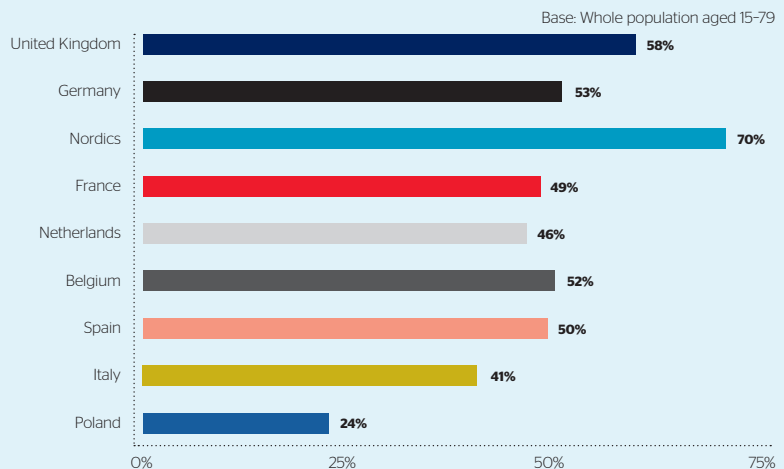
The proportion who have at some time shopped online from abroad (millions of people)



Seven out of ten Nordic residents have at some time shopped online from abroad.

>> Nordics at the top by a wide margin

The proportion who have at some time shopped online from abroad





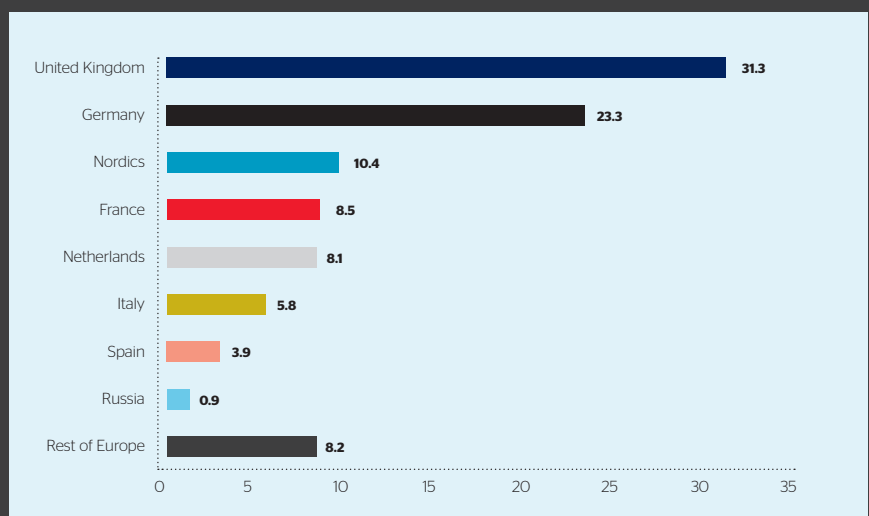
E-commerce within Europe

The United Kingdom and Germany are by far the most popular choices when Europeans buy from other European countries, but there are regional variations. For example, the Dutch and the Belgians prefer to buy from their neighbouring countries, while Nordic residents shop online extensively from the United Kingdom and Germany.

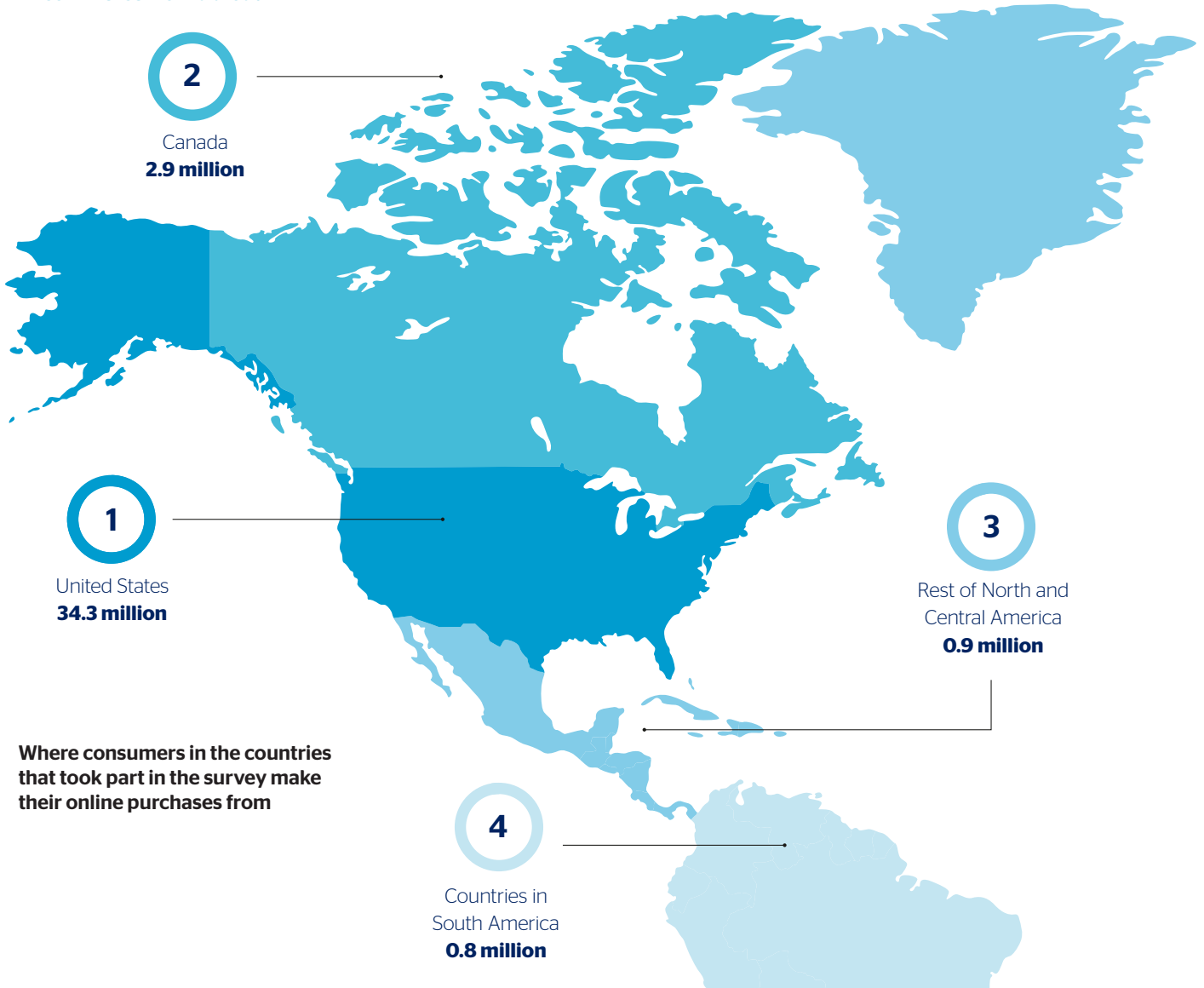
The other European markets do not attract consumers to an equally high degree. In the survey there were particularly few people who bought products online from Russia.

>> The United Kingdom is the most popular country Where European e-commerce consumers buy products from when they buy from abroad within Europe (millions of people)

Base: Whole population aged 15-79



>> E-commerce from abroad



Where consumers in the countries that took part in the survey make their online purchases from

E-commerce from North and South America

The United States remains a popular country among many Europeans for online shopping, despite the fact that import duties and the currently strong dollar can be expected to reduce online shopping from the United States.

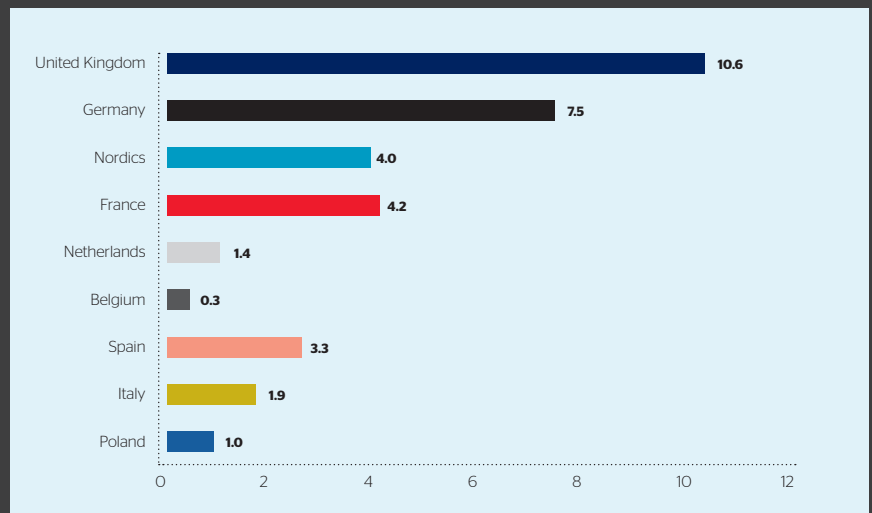
Most people who buy products online from the United States are British or German, but a large number of French, Nordic and Spanish consumers also make US purchases. Among the countries included in the survey, Belgium has the lowest number of consumers who have purchased products online from the United States. Belgium and Italy are the only countries where the United States is not among the top three countries from which consumers buy products.

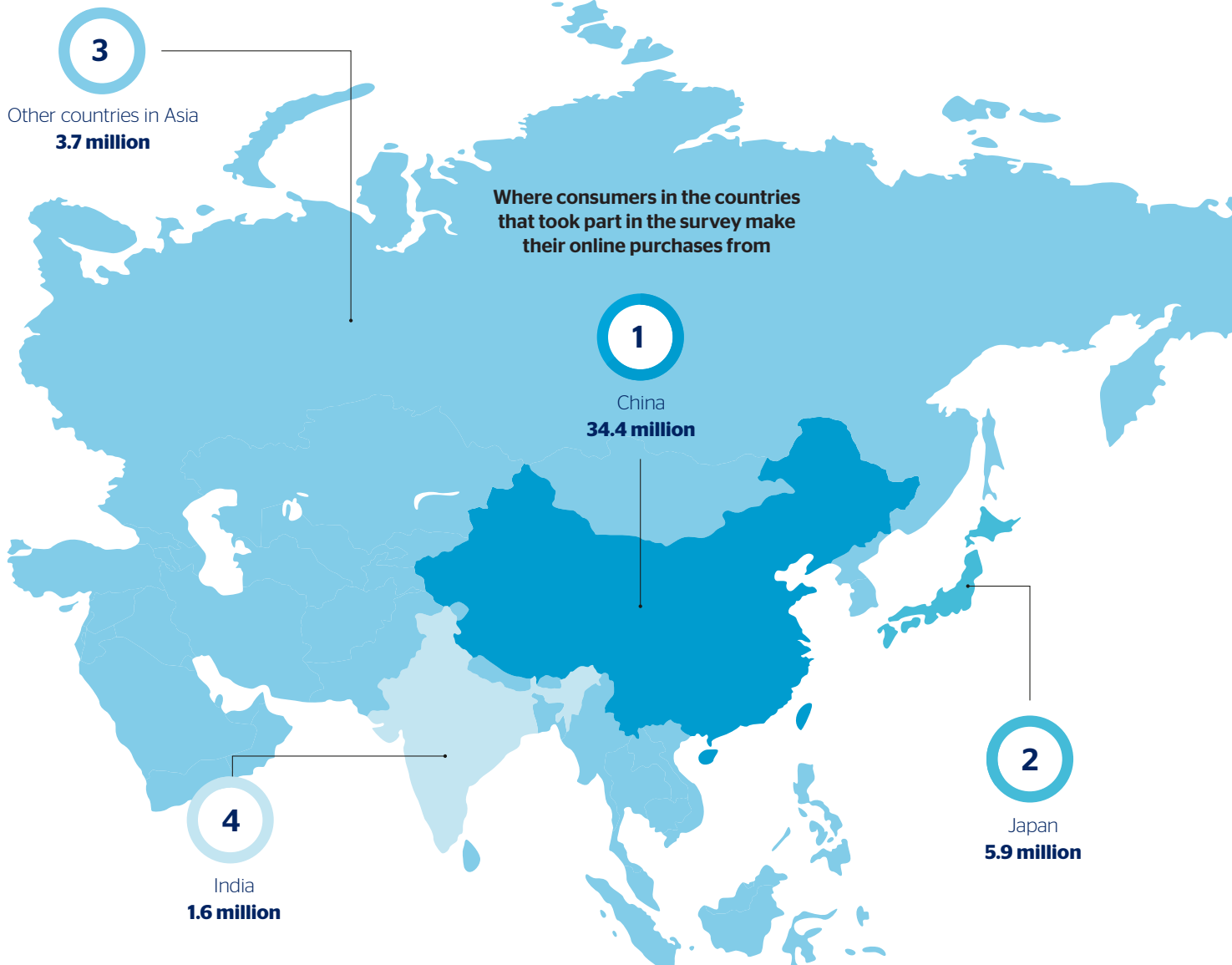
E-commerce from other countries in North and South America is on a much smaller scale. About three million Europeans have shopped online from Canada. In total just under two million have shopped online from all other countries in the region.

>> E-commerce from the United States

The number of millions of consumers who have shopped online from the United States

Base: Whole population aged 15-79





E-commerce from Asia

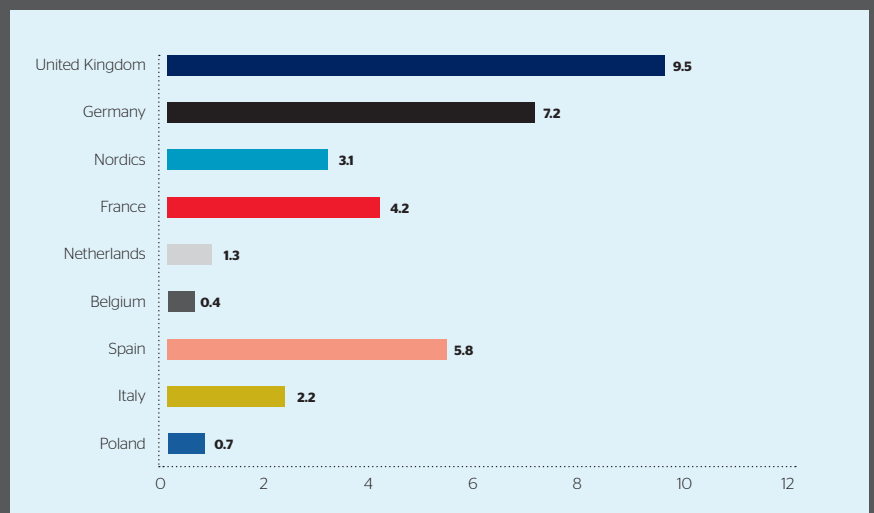
The vast range of products available in the Chinese market, combined with the often low prices, makes the country an increasingly popular market from which to buy products online. Consumers in Europe are becoming increasingly mature and are buying more from abroad, while still rating low prices as an important factor, which indicates that China will continue to be a large growth market in the future.

The United Kingdom and Germany have the largest number of consumers who have shopped online from China, but the country in which the largest number have shopped online from China in relation to the size of the population is Spain. France, Belgium and Poland are the only countries in which China is not on the top three list of the most popular countries from which to buy products online.

>> E-commerce from China

The number of millions of consumers who have shopped online from China

Base: Whole population aged 15-79



Nearly **one in three** British people buy food online. This makes them unique.



United Kingdom



- » Capital city
- » Population 15-79 years old
- » Languages
- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

London
49.9 million
English
Pound
90%
87%

CDs and films still constitute a solid part of e-commerce.

>> Focus on the United Kingdom

The largest e-commerce nation

Large population and high level of Internet penetration

Many people in the United Kingdom shop online, and the majority of them have also shopped from abroad. The United States is the most popular country from which UK residents buy products online.

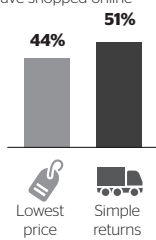
It is still popular to buy books and home electronics online, although these categories are decreasing somewhat compared to last year's survey. CDs and films constitute a solid part of e-commerce – about 30% of those who shopped online bought products from this category. CDs replace books on the list of the top three products that British consumers buy online from abroad. Sport and leisure articles, a popular category in other countries, is not on British consumers' list of most popular products and could therefore constitute a category with growth potential.

Food is a popular and unique category

Nearly a third of British consumers stated that they buy food online, which is the highest proportion in the survey. The main reason for the category's strong position is that many online supermarkets have been very successful with their offers. For example, enormous logistics facilities have been built throughout the country to enable food to be delivered the day after it is ordered.

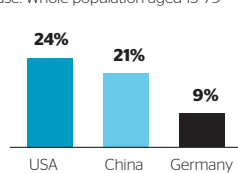
>> The importance of lowest price and simple returns*

Base: Have shopped online



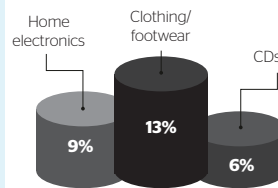
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

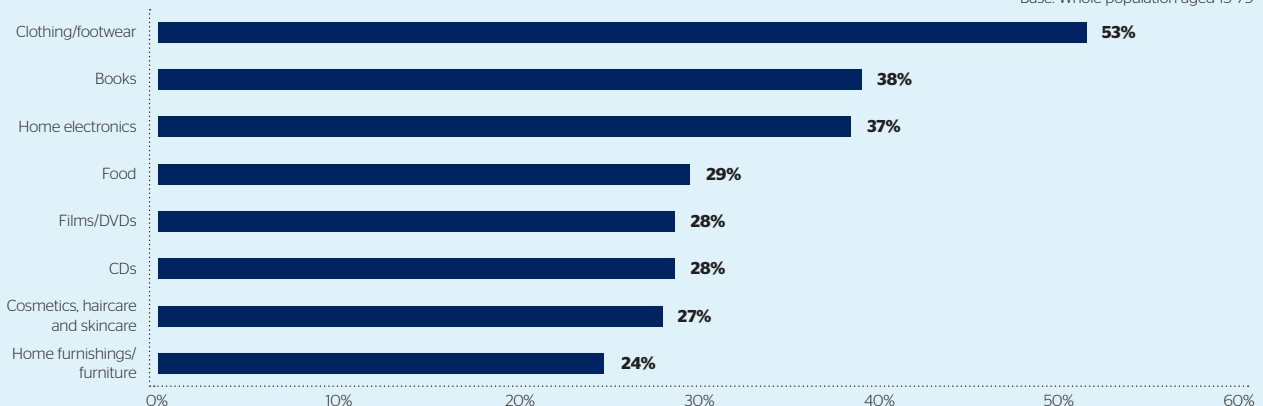
43.5

>> Proportion who have at some time shopped online from abroad

58%

>> Top eight products bought by British consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

» Focus on **Germany**

Simple returns are important - **nearly twice as important** as a low price.

Germany

- » Capital city
- » Population 15-79 years old
- » Languages
- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

Berlin
65.8 million
German
Euro
89%
87%



Nearly one in four Germans have bought home furnishings online.

>> Focus on **Germany**

A large, well-developed market

Many people have shopped online

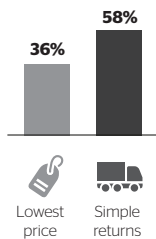
Like the United Kingdom, Germany is characterized by a large population and a high level of Internet penetration. Simple returns are important to Germans – nearly twice as important as a low price. Just like in many other markets, consumers prefer to buy clothes and footwear from both domestic and international sellers. Like British consumers, Germans buy a large number of CDs and films online. Home furnishings and furniture are also popular e-commerce items.

United Kingdom most popular

A majority of those who have shopped online state that they have also bought items from abroad. The United Kingdom and the United States are the most popular countries from which to buy products. When Germans buy from abroad, home electronics is a product category that stands out, as do clothes and footwear. However, books are not found on the list of most popular items.

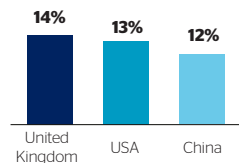
>> The importance of lowest price and simple returns*

Base: Have shopped online



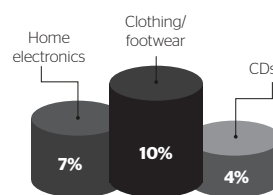
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

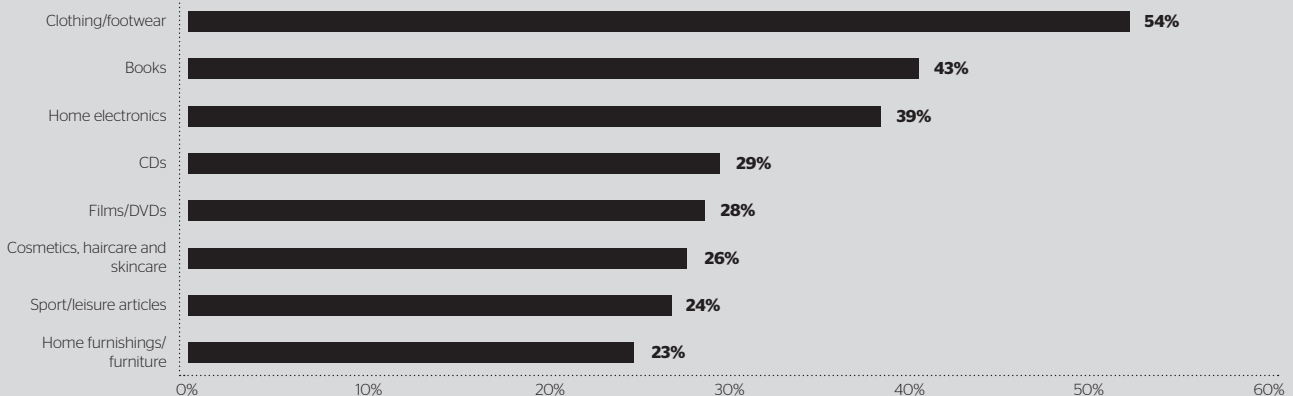
57.4

>> Proportion who have at some time shopped online from abroad

53%

>> Top eight products bought by German consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

Seven out of ten

have shopped online from abroad. This is the largest number in the survey.

The Nordics

- » Capitals
- » Population 15-79 years old
- » Languages
- » Currencies
- » Internet penetration
- » Proportion of the population who have shopped online



	Oslo	Copenhagen	Helsinki	Stockholm
				20.2 million*
	Norwegian	Danish	Finnish	Swedish
	NOK	DKK	Euro	SEK
				96%*
				88%*

* Nordic average (Sweden, Denmark, Norway and Finland)

Dietary supplements are a large category, which makes Nordic residents stand out in the survey.

>> Focus on the Nordics

Largest proportion buying from abroad

A well-developed market with a very high level of Internet penetration

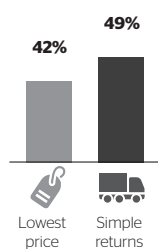
The Nordic countries all have a level of Internet penetration that exceeds 90%. Here, clothes, home electronics and books are also the most popular e-commerce products. Despite the maturity of the market, food has not made it onto the list of best-selling products. Outside the top three on the list, Nordic residents differ to some extent from other countries. Online purchases of dietary supplements are common in the Nordics. Cosmetics, skincare and haircare are also popular.

Many have shopped online from abroad

E-commerce from abroad is common in the region. No fewer than seven out of ten Nordic consumers have at some point shopped online from outside their national borders. Like other countries in the survey, the United Kingdom and the United States are the most popular countries to buy from, even though exchange rate fluctuations have weakened Nordic residents' purchasing power in relation to these countries. In shopping from abroad, the same product categories top the list of best-selling articles as in shopping from domestic sellers - clothing/footwear and home electronics - but consumers also like to buy cosmetics, skincare and haircare. Books are not, however, purchased online from abroad to any significant extent.

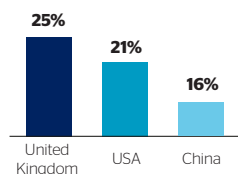
>> The importance of lowest price and simple returns*

Base: Have shopped online



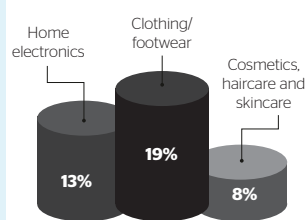
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

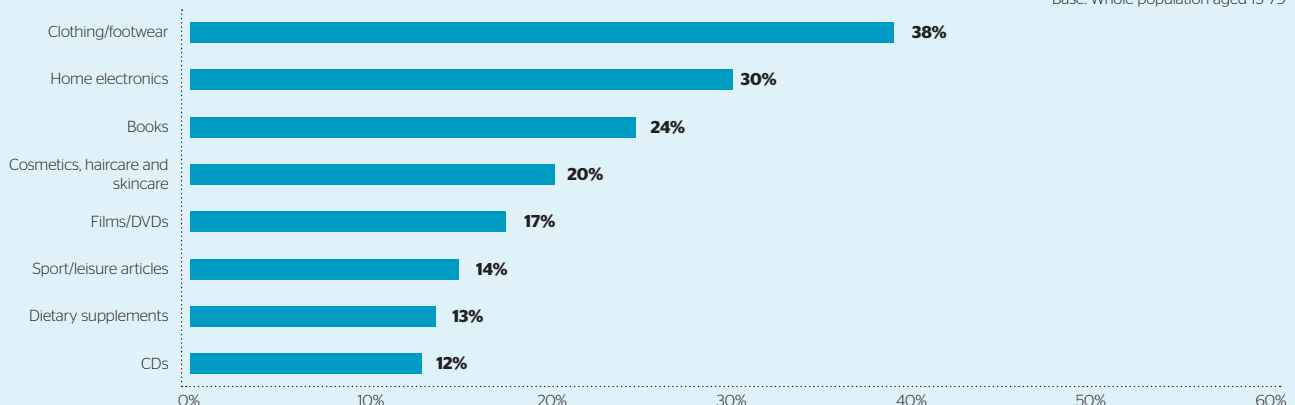
17.8

>> Proportion who have at some time shopped online from abroad

70%

>> Top eight products bought by Nordic consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

The French buy more **food online** than the vast majority of other consumers.

France



- » Capital city
- » Population 15-79 years old
- » Languages
- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

Paris
49.9 million
French
Euro
83%
79%



Both **children's articles** and **toys** on the list of **best-selling products**.

>> Focus on **France**

A large market with growth potential

Many shop online in relation to the level of Internet use

Given the somewhat lower level of Internet penetration in France, many people have nonetheless shopped online. Thus far, a somewhat smaller proportion shop online from abroad compared to other markets in the survey, but when the consumers do so, they mainly choose other large European countries. The United Kingdom, Germany and the United States are all major e-commerce partners for France, but the United States is only in third place. It is interesting that although there may be a language barrier, the French like to buy books online from abroad.

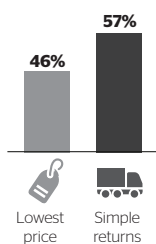
Children's articles and toys

Clothes and footwear, books and home electronics top the list of articles bought by the French online, but cosmetics, haircare and skincare are also among the best-selling products. Like the British, the French buy food online, but the forms of shopping differ somewhat from those in the United Kingdom. For example, it is commonplace for consumers to order food online and collect it from the shops themselves.

France particularly stands out since a large portion of its e-commerce concerns children's articles: the French like to buy toys and other children's articles online. This deviates from e-commerce preferences in the other European countries.

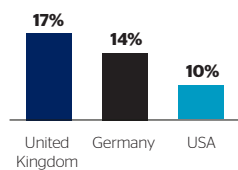
>> The importance of lowest price and simple returns*

Base: Have shopped online



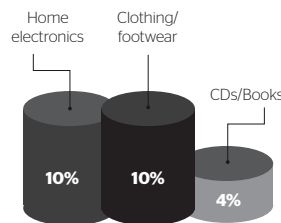
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

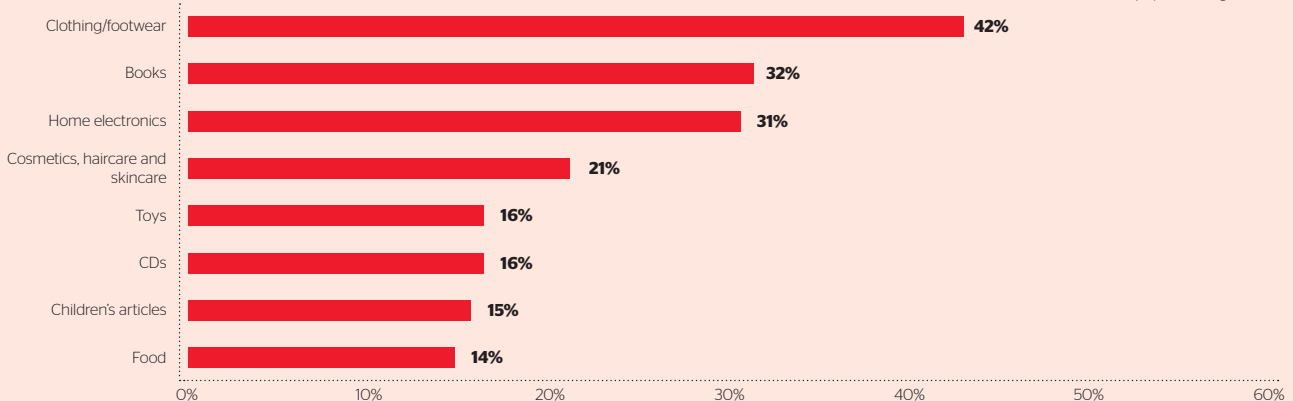
39.6

>> Proportion who have at some time shopped online from abroad

49%

>> Top eight products bought by French consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

Spain is the only country in which consumers **primarily choose China** when shopping online from abroad.



Spain



- » Capital city
- » Population 15-79 years old
- » Languages
- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

Madrid
36.7 million
Spanish
Euro
75%
69%

Largest in terms of e-commerce from China

Preferences similar to those in other markets

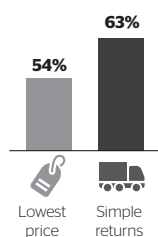
Spaniards' preferences resemble those of consumers in other countries. They buy clothes and footwear, home electronics and books online. Both simple returns and a low price are considered important factors affecting whether people buy online. Spaniards differ from other Europeans in that they also buy car accessories online, which, together with Poland, makes them stand out in this survey. Other deviating categories for Spaniards are food and toys.

China is the most popular country from which to buy products online

Half of those who have shopped online at some point have also bought items from abroad. An unusually high proportion of consumers have shopped online from China, which differentiates Spain from other European countries in the survey. The preferences for what consumers buy differ somewhat in e-commerce from abroad. As in many other countries, books are not among the best-selling products.

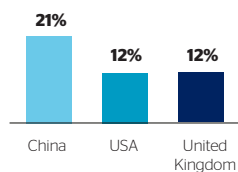
>> The importance of lowest price and simple returns*

Base: Have shopped online



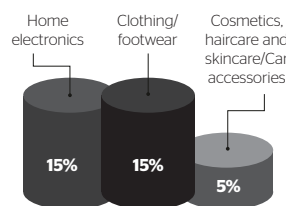
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions consumers who have shopped online

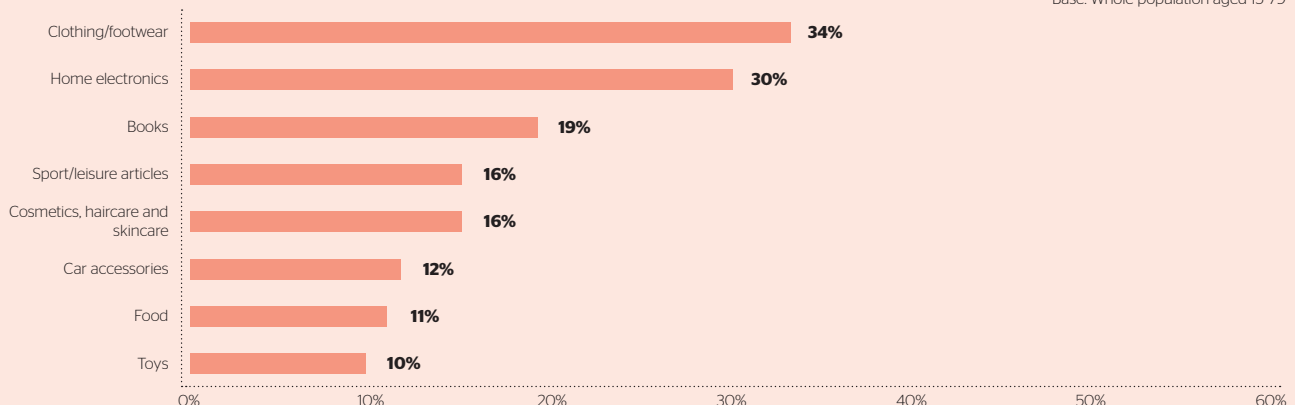
25.5

>> Proportion who have at some time shopped online from abroad

50%

>> Top eight products bought by Spanish consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

Italy is the only country in which **home electronics are the most popular** – not clothing and footwear.

Italy



- » Capital city
- » Population 15-79 years old
- » Languages
- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

Rome
48.4 million
Italian
Euro
59%
54%

Italians like to buy **building and gardening materials** online.

Home electronics top the list

Low level of Internet penetration

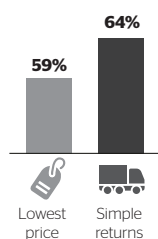
Italy has the lowest level of Internet penetration of all the countries in the selection, but given this, a relatively large number of people have nonetheless shopped online. Clothes and footwear are not at the top of the list, and instead home electronics are the most popular products, followed by clothes, footwear and books. When Italians shop online from abroad, they have the same preferences in terms of product categories. The United Kingdom and Germany are the main countries from which Italian consumers buy their products online.

Building and gardening materials are popular

Preferences for what items are purchased online follow roughly the same pattern as in the rest of Europe. Italians differ from other Europeans, however, because they often buy building and gardening materials online, which makes them unique in the survey. The ease of returning items bought online is very important to Italians.

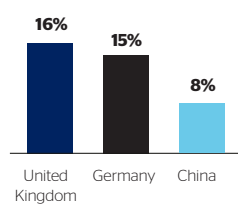
>> The importance of lowest price and simple returns*

Base: Have shopped online



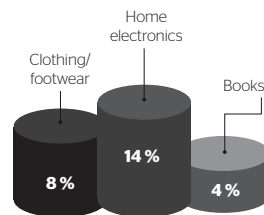
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

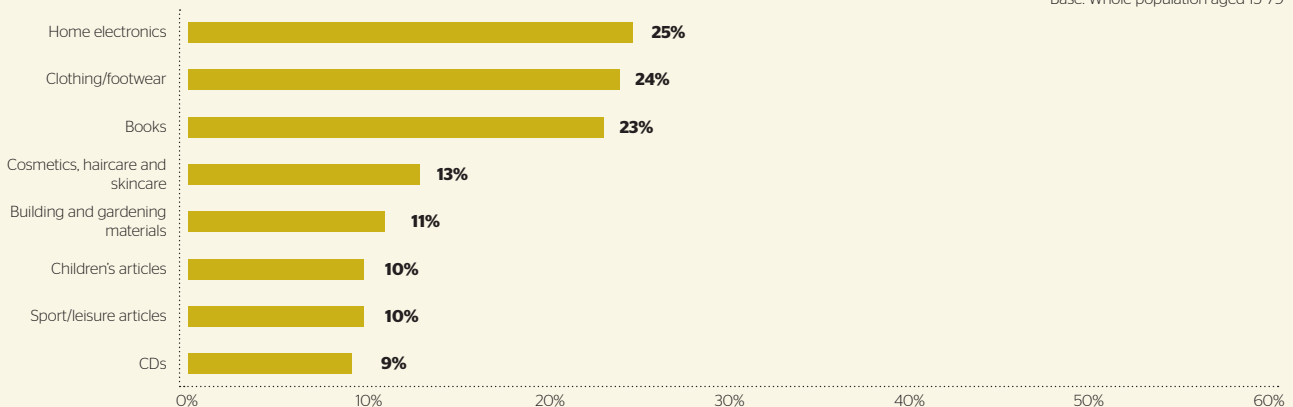
26.2

>> Proportion who have at some time shopped online from abroad

41%

>> Top eight products bought by Italian consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

» Focus on **the Netherlands**

The Dutch prefer to buy **from Germany**. The United Kingdom is not, however, on their list of top countries.



The Netherlands



- » Capital city
- » Population 15-79 years old
- » Languages
- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

Amsterdam
13.3 million
Dutch
Euro
96%
88%

Home furnishings and furniture are a popular e-commerce category.

>> Focus on **the Netherlands**

A front-running market

Small population with high level of Internet penetration

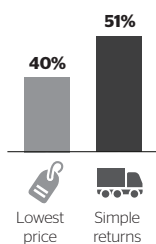
Together with the Nordics, the Netherlands has the highest level of Internet penetration in the survey, and – also as in the Nordics – many consumers have at some point shopped online. Clothes/footwear, home electronics and books are also at the top of the list here, and a simple returns process is important. As in the United Kingdom, Germany and Poland, consumers buy home furnishings and furniture online, which makes the Netherlands stand out from many of the other countries in the survey.

E-commerce from Germany

Only about half of the consumers have shopped online from abroad. Their neighbouring country, Germany, is the most popular, followed by the United States and China. The United Kingdom is not on the list of the most popular countries to buy from, which deviates from the lists of the other countries in the survey.

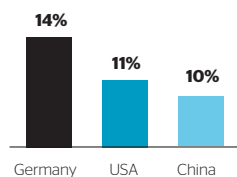
>> The importance of lowest price and simple returns*

Base: Have shopped online



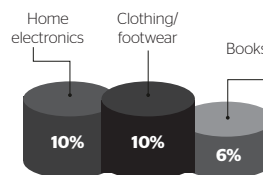
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

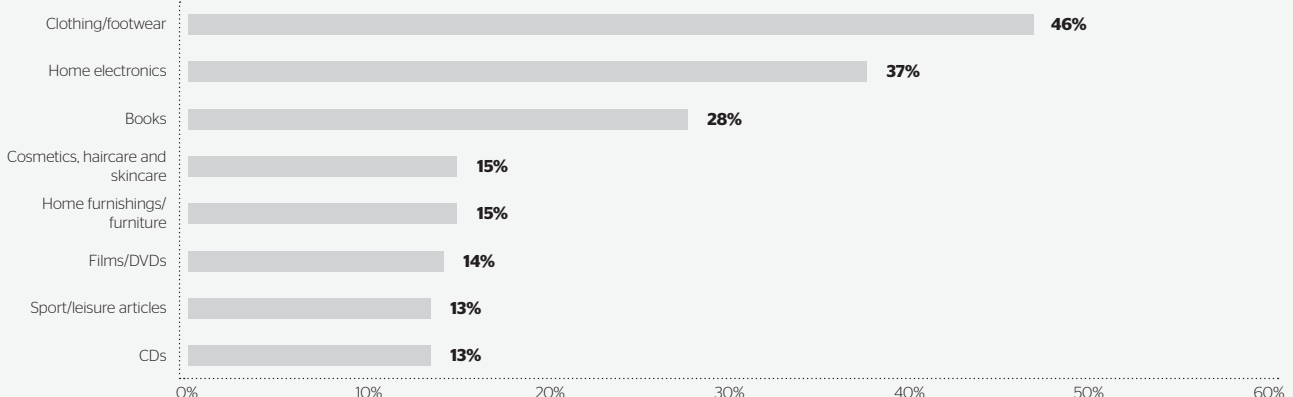
11.6

>> Proportion who have at some time shopped online from abroad

46%

>> Top eight products bought by Dutch consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

>> Focus on **Belgium**

Belgians purchase **by far most of their products from the Netherlands**. Nearly half of the purchases from abroad are from there.



Belgium



- » Capital city
- » Population 15-79 years old
- » Languages

- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

Brussels
8.7 million
**French/
Dutch**
Euro
90%
77%

The United States is not on the list of the most popular countries from which Belgians buy products online.

>> Focus on **Belgium**

Loyal to their neighbours

The smallest nation in the survey

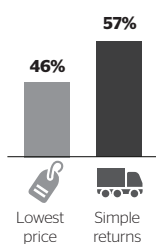
Like other Europeans, Belgians' preferences consist of clothes and footwear, home electronics and books. A simple returns process is important. Cosmetics, haircare and skincare constitute a category that is growing in significance. Films and DVDs as well as CDs remain popular categories. Children's articles are also in the top eight, just like in their neighbouring country of France.

Small country that buys from neighbouring countries

More than half of the respondents have shopped online from abroad at some point. Belgians are bilingual and like to shop from their neighbouring countries. The Netherlands is by far the most popular country - from which almost half of purchases from abroad are made - followed by Germany and the United Kingdom. Belgians do not buy very many products from the United States, which makes Belgium stand out from other European countries in survey.

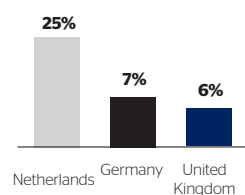
>> The importance of lowest price and simple returns*

Base: Have shopped online



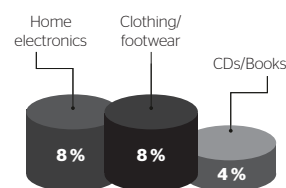
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

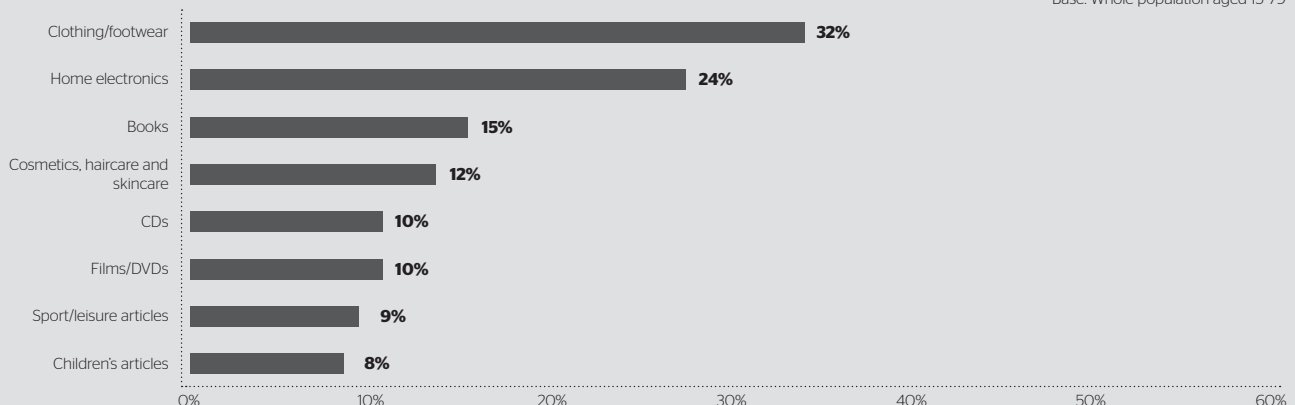
6.7

>> Proportion who have at some time shopped online from abroad

52%

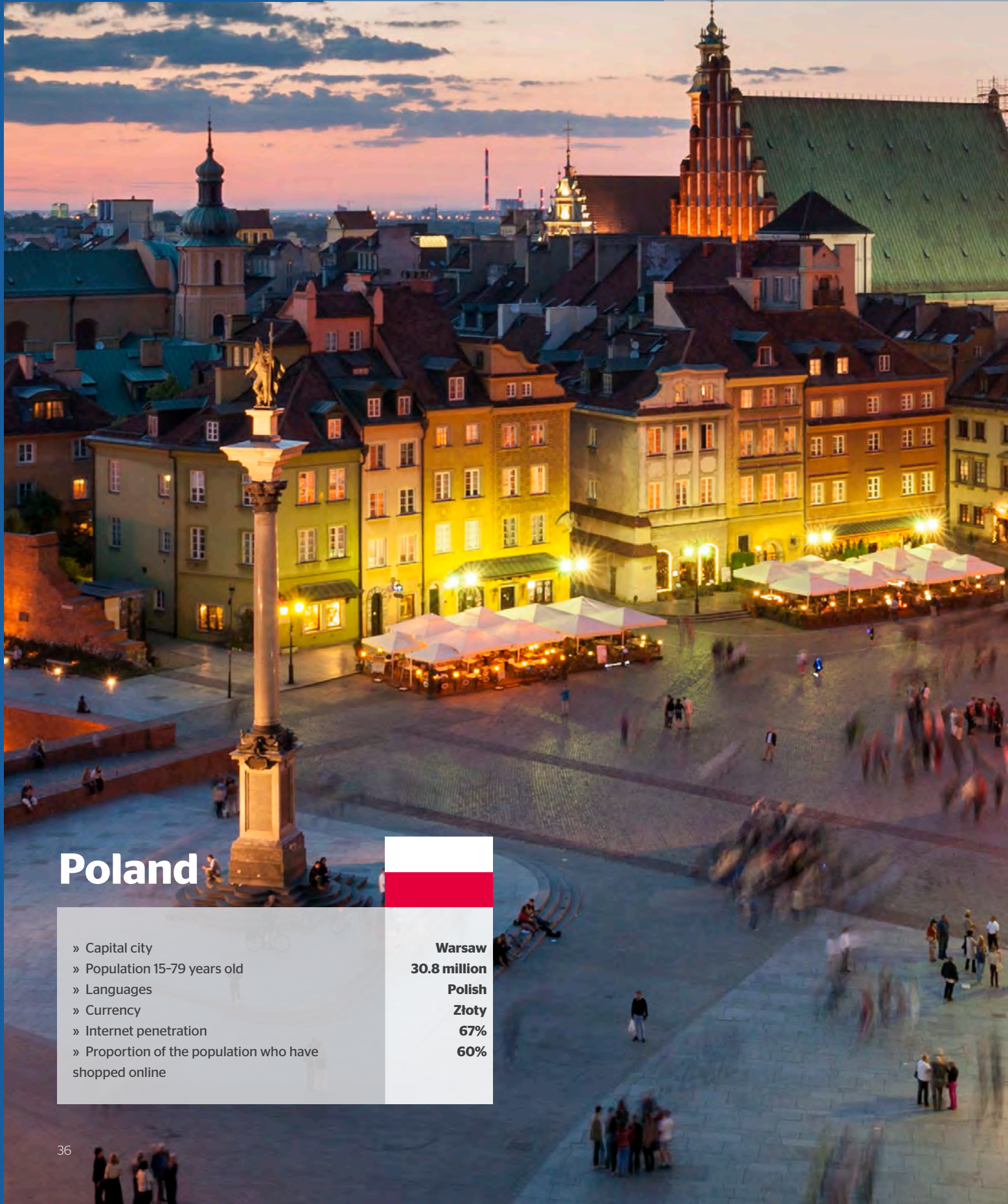
>> Top eight products bought by Belgian consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

Only one in four have shopped online from abroad, which indicates future growth potential.



Poland

- » Capital city
- » Population 15-79 years old
- » Languages
- » Currency
- » Internet penetration
- » Proportion of the population who have shopped online

Warsaw
30.8 million
Polish
Złoty
67%
60%

Like in Spain, many buy **car accessories** online.

Opportunities for substantial growth

Low level of Internet penetration indicates growth potential

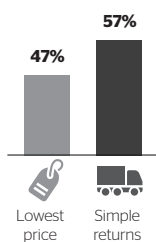
Like Italy, Poland is a country that is slightly behind the other countries in the survey in terms of its level of Internet penetration and its proportion of the population who have shopped online. This has led many people to see Poland, accompanied by other former Eastern bloc countries, as the next e-commerce growth market. The preferences of Polish consumers are very similar to those of their European neighbours. Clothes, footwear, home electronics and books dominate. Like Spaniards, Polish consumers buy car accessories online.

Low proportion who have shopped online from abroad

Only one in four Polish shoppers have ever shopped online from abroad, which is probably because of the low price levels in Poland compared to other European countries in the survey. Substantial change will take place when Polish consumers find the global market. Those who currently shop online from abroad do so from the United Kingdom, the United States and also from Germany.

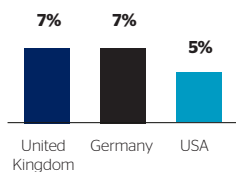
>> The importance of lowest price and simple returns*

Base: Have shopped online



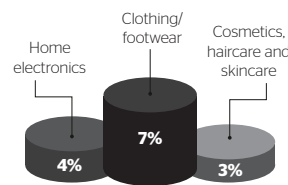
>> Top three most popular countries from which to buy

Base: Whole population aged 15-79



>> Top three most common products bought online from abroad

Base: Whole population aged 15-79



>> Number of millions of consumers who have shopped online

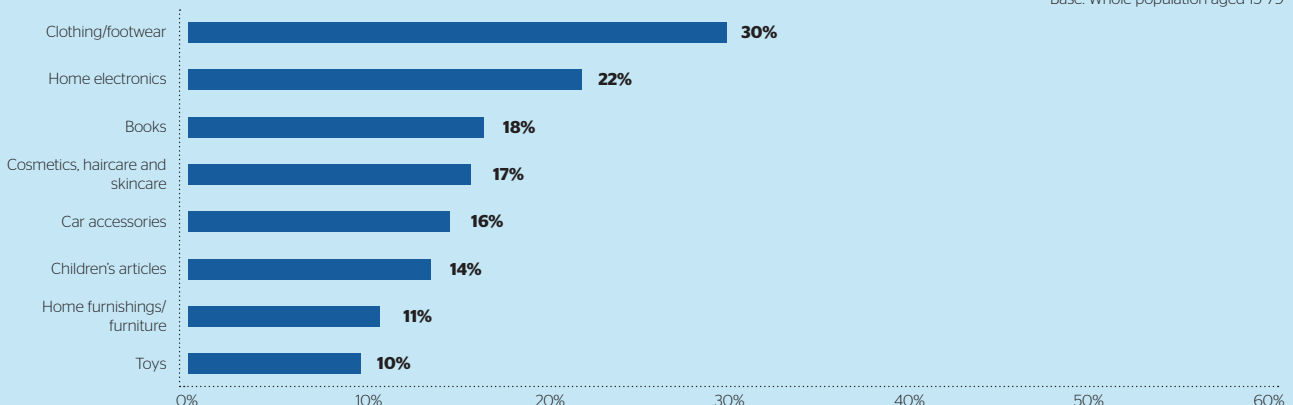
18.6

>> Proportion who have at some time shopped online from abroad

24%

>> Top eight products bought by Polish consumers online during the year

Base: Whole population aged 15-79



*The proportion of online shoppers who consider that lowest price and simple returns are very important if they are to buy from a webshop.

Detailed results

Number of people who have shopped online

The survey was conducted in April 2015 by the research company Nepa. The number of respondents varies somewhat between the countries; in most countries more than 1,000 people responded. The Nordics are an exception, where the countries are reported as one cohesive region, within which the number of respondents totaled about 600 per country. The survey took the form of online surveys, which means that the results are relevant for the proportion of the population with Internet access. To obtain statistics on the population's e-commerce habits, the responses were therefore re-calculated on the basis of each country's Internet penetration together with population statistics.

Results from the survey

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Have shopped online in the past year	96%	95%	84%	90%	87%	77%	84%	85%	84%
Have shopped online	97%	98%	92%	96%	91%	86%	92%	92%	90%
Have shopped online from abroad	67%	61%	80%	62%	52%	68%	73%	76%	40%
(Base: have shopped online)									

Internet penetration*

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Internet penetration*	90%	89%	96%	83%	96%	90%	75%	59%	67%

* Source: Internet World Stats, relates to mid-June 2014, <http://www.internetworldstats.com/stats4.htm#europe>

Population**

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Total millions	64.3	80.8	25.8	65.8	16.8	11.2	46.5	60.8	38.0
Proportion aged 15-79	78%	82%	78%	76%	79%	78%	79%	80%	81%
Aged 15-79, millions	49.9	65.8	20.2	49.9	13.3	8.7	36.7	48.4	30.8

** Source: Eurostat, European Union, refers to 2014:
<http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tps00001&plugin=1>
<http://ec.europa.eu/eurostat/tgm/refreshTableAction.do?tab=table&plugin=1&pcode=tps00010&language=en>

Whole population (aged 15-79)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Base: Have shopped online in past year	86%	84%	80%	75%	83%	69%	63%	50%	57%
Base: Have shopped online	87%	87%	88%	79%	88%	77%	69%	54%	60%
Base: Have shopped online from abroad	58%	53%	70%	49%	46%	52%	50%	41%	24%
Base: Have shopped online, millions	43.5	57.4	17.8	39.6	11.6	6.7	25.5	26.2	18.6
Base: Have shopped online from abroad, millions	29.1	34.8	14.2	24.4	6.1	4.6	18.5	20.0	7.4

Average spend and turnover

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Average spend in one year, local currency (Base: Have shopped online)	848	771	-*	679	636	467	593	546	1,363
Exchange rate April 24, 2015, EUR	1.39	1	-*	1	1	1	1	1	0.25
Average spend in one year, EUR (Base: Have shopped online)	1,180	771	622	679	636	467	593	546	340
Average spend in one year, EUR (Base: Whole population aged 15-79)	1,028	672	549	539	558	362	411	295	205
Total turnover, EUR, billions	51.3	44.2	11.1	26.9	7.4	3.1	15.1	14.3	6.3

* Not relevant because the results for the Nordic countries are presented as one combined result.

Product categories

What kind of products have you bought online in the past year?

(Base: Have shopped online)

Clothing/footwear

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	53%	54%	38%	42%	46%	32%	34%	24%	30%	
Millions of consumers	23.9	31.5	7.4	17.2	5.9	2.5	9.3	6.8	6.1	110.7

Home electronics

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	37%	39%	30%	31%	37%	24%	30%	25%	22%	
Millions of consumers	16.8	23.1	5.9	12.8	4.7	1.9	8.2	7.2	4.5	85.1

Books

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	38%	43%	24%	32%	28%	15%	19%	23%	18%	
Millions of consumers	17.2	25.3	4.5	13.2	3.6	1.2	5.1	6.6	3.8	80.5

Cosmetics, haircare and skincare

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	27%	26%	20%	21%	15%	12%	16%	13%	17%	
Millions of consumers	12.3	15.5	3.9	8.7	1.9	1.0	4.4	3.8	3.5	54.9

CDs

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	28%	29%	12%	16%	13%	10%	9%	9%	8%	
Millions of consumers	12.6	16.9	2.4	6.5	1.6	0.8	2.6	2.7	1.6	47.6

Films/DVDs

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	28%	28%	17%	14%	14%	10%	8%	8%	4%	
Millions of consumers	12.7	16.6	3.3	5.7	1.8	0.8	2.3	2.3	0.9	46.4

Home furnishings/furniture

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	24%	23%	11%	13%	15%	8%	9%	4%	11%	
Millions of consumers	10.8	13.5	2.2	5.4	1.9	0.6	2.5	1.2	2.2	40.2

Sport and leisure articles

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	13%	24%	14%	14%	13%	9%	16%	10%	8%	
Millions of consumers	5.8	13.9	2.8	5.6	1.6	0.7	4.4	2.7	1.7	39.2

>> Detailed results

Toys

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	21%	18%	9%	16%	12%	6%	10%	9%	10%	
Millions of consumers	9.5	10.4	1.7	6.7	1.5	0.4	2.8	2.4	2.0	37.4

Children's articles

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	18%	17%	9%	15%	12%	8%	9%	10%	14%	
Millions of consumers	8.0	9.8	1.7	6.4	1.6	0.6	2.6	2.8	2.9	36.4

Food

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	29%	13%	7%	14%	7%	4%	11%	6%	5%	
Millions of consumers	13.0	7.7	1.3	6.0	0.9	0.3	3.0	1.8	1.1	35.0

Car accessories

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	15%	19%	9%	11%	6%	5%	12%	9%	16%	
Millions of consumers	6.7	11.4	1.7	4.6	0.8	0.4	3.4	2.5	3.4	34.9

Favourite products bought abroad

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
First place	Clothing/ footwear	Clothing/ footwear	Clothing/ footwear	Clothing/ footwear	Clothing/ footwear	Clothing/ footwear	Clothing/ footwear	Home electronics	Clothing/ footwear
Second place	CDs	Home electronics	Home electronics	Home electronics	Home electronics	Home electronics	Home electronics	Home electronics	Home electronics
Third place	Home electronics	CDs	Cosmetics, skincare and hair- care	Books CDs	Books	Books CDs	Cosmetics, skincare and haircare	Books	Cosmetics, skincare and haircare
							Car accessories		

How important is the lowest price?

The proportion of online shoppers who consider it very important that the lowest price is on offer if they are to buy from a website.

(Base: Have shopped online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Per cent	44%	36%	42%	46%	40%	46%	54%	59%	47%

Which payment method is preferred?

Which of the following methods do you prefer to use when you pay for a product you've bought online?

(Base: Have shopped online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Debit card or credit card	49%	17%	34%	52%	26%	47%	36%	30%	14%
Invoice in arrears	2%	29%	23%	4%	15%	7%	2%	2%	3%
Direct payment through my bank	5%	17%	17%	4%	22%	23%	4%	9%	34%
PayPal or similar	40%	32%	18%	35%	31%	17%	41%	45%	23%
Cash on delivery	4%	3%	4%	4%	3%	4%	15%	13%	24%
Payment by installments	1%	2%	3%	0%	3%	1%	1%	1%	1%
Don't know	1%	0%	1%	2%	1%	1%	1%	1%	0%

How important is fast delivery?

The proportion who consider it very important that delivery is fast (max. three days) if they are to buy from a website.

(Base: Have shopped online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Per cent	37%	39%	26%	44%	43%	42%	41%	45%	54%

How long a delivery time is acceptable?

When you order a product online, what are your expectations of the delivery time, i.e. how many days may it take at the most to receive the product?

(Base: Have shopped online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
1-2 days	15%	14%	8%	12%	32%	15%	12%	9%	20%
3-5 days	74%	75%	60%	71%	57%	62%	61%	72%	67%
6 days or more	9%	9%	25%	15%	8%	18%	24%	17%	9%
Don't know	3%	2%	7%	2%	2%	5%	3%	2%	3%

>> Detailed results

How important are trouble-free returns?

The proportion who consider it very important to have a simple way of returning products if they are to buy from a website.

(Base: Have shopped online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Per cent	51%	58%	49%	57%	51%	57%	63%	64%	57%

Proportion of the population who have returned a product bought online in the past year

(Base: Whole population aged 15-79)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Per cent	32%	41%	27%	24%	36%	21%	18%	13%	11%

Returns by product category

What kind of products have you returned in the past year?

(Base: Whole population aged 15-79)

Clothing/footwear

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	18%	25%	16%	14%	27%	13%	10%	6%	6%	
Millions of consumers	8.3	14.8	3.1	5.7	3.4	1.0	2.7	1.6	1.2	41.8

Home electronics

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	5%	6%	4%	4%	5%	3%	4%	3%	2%	
Millions of consumers	2.0	3.5	0.8	1.7	0.6	0.3	1.1	0.9	0.4	11.3

Home furnishings/furniture

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	2%	2%	1%	1%	1%	1%	0%	0%	1%	
Millions of consumers	0.8	1.2	0.2	0.4	0.2	0.1	0.1	0.1	0.2	3.3

Books

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	1%	2%	1%	1%	1%	0%	0%	1%	0%	
Millions of consumers	0.6	1.3	0.2	0.4	0.1	0.0	0.1	0.3	0.1	3.2

Children's articles

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	2%	2%	1%	1%	1%	1%	1%	1%	1%	
Millions of consumers	0.8	0.9	0.2	0.3	0.2	0.1	0.2	0.3	0.2	3.1

Sport/leisure articles

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	1%	2%	1%	1%	1%	1%	1%	0%	0%	
Millions of consumers	0.5	1.4	0.2	0.3	0.2	0.0	0.2	0.1	0.0	2.9

Car accessories

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	1%	1%	1%	1%	0%	0%	1%	1%	1%	
Millions of consumers	0.6	0.7	0.1	0.5	0.0	0.0	0.2	0.2	0.2	2.5

CDs

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
Per cent	2%	1%	1%	1%	1%	0%	1%	1%	0%	
Millions of consumers	0.9	0.5	0.1	0.4	0.1	0.0	0.1	0.1	0.0	2.3

Proportion of the population who have shopped online from various countries

(Base: Whole population aged 15-79)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Sweden	2%	1%	10%	1%	0%	1%	1%	1%	1%
Denmark	1%	1%	5%	1%	1%	0%	0%	1%	1%
Norway	1%	0%	1%	0%	1%	0%	0%	0%	1%
Finland	1%	0%	1%	0%	0%	0%	0%	0%	0%
Iceland	0%	0%	0%	0%	0%	0%	0%	0%	0%
UK	0%	14%	25%	17%	10%	6%	12%	16%	7%
Germany	9%	0%	15%	14%	14%	7%	9%	15%	7%
Netherlands	1%	5%	3%	2%	0%	25%	2%	1%	1%
France	4%	4%	3%	0%	3%	3%	6%	5%	2%
Spain	2%	1%	2%	2%	1%	1%	0%	3%	1%
Italy	3%	3%	1%	3%	1%	1%	4%	0%	1%
Russia	1%	0%	0%	0%	0%	0%	0%	1%	0%
Rest of Europe	4%	5%	4%	2%	3%	1%	2%	2%	1%
USA	24%	13%	21%	10%	11%	4%	12%	7%	5%
Canada	2%	1%	2%	2%	1%	0%	1%	1%	1%
Rest of North and Central America	0%	0%	0%	0%	0%	0%	0%	0%	0%
China	21%	12%	16%	10%	10%	5%	21%	8%	3%
India	1%	1%	1%	0%	0%	0%	0%	1%	0%
Japan	4%	1%	2%	3%	1%	1%	3%	2%	0%
Rest of Asia	3%	1%	3%	1%	1%	0%	1%	1%	1%
Australia	3%	1%	1%	1%	1%	0%	0%	0%	0%
Countries in South America	0%	0%	0%	0%	0%	0%	1%	0%	0%
Countries in Africa	0%	0%	0%	0%	0%	0%	0%	0%	0%

Number of millions who have shopped online from various countries

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Sweden	0.9	0.5	2.0	0.3	0.1	0.0	0.4	0.3	0.1
Denmark	0.5	0.8	0.9	0.2	0.1	0.0	0.1	0.2	0.1
Norway	0.4	0.1	0.3	0.2	0.1	0.0	0.1	0.1	0.1
Finland	0.4	0.1	0.2	0.0	0.0	0.0	0.0	0.1	0.0
Iceland	0.2	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.0
UK	0.0	8.4	4.7	7.2	1.2	0.4	3.3	4.6	1.4
Germany	3.9	0.0	3.0	5.9	1.8	0.5	2.4	4.3	1.4
Netherlands	0.6	3.1	0.5	1.0	0.0	1.9	0.4	0.4	0.3
France	1.8	2.1	0.5	0.0	0.3	0.3	1.7	1.4	0.3
Spain	0.8	0.6	0.3	1.0	0.2	0.0	0.0	0.8	0.1
Italy	1.2	1.7	0.2	1.2	0.1	0.1	1.0	0.0	0.2
Russia	0.3	0.1	0.1	0.1	0.0	0.0	0.1	0.2	0.0
Rest of Europe	1.8	2.8	0.8	0.8	0.4	0.1	0.6	0.6	0.2
USA	10.6	7.5	4.0	4.2	1.4	0.3	3.3	1.9	1.0
Canada	0.7	0.6	0.3	0.7	0.1	0.0	0.1	0.2	0.1
Rest of North and Central America	0.2	0.2	0.1	0.1	0.0	0.0	0.1	0.1	0.0
China	9.5	7.2	3.1	4.2	1.3	0.4	5.8	2.2	0.7
India	0.7	0.3	0.1	0.2	0.0	0.0	0.1	0.2	0.0
Japan	1.9	0.7	0.5	1.2	0.2	0.1	0.9	0.5	0.1
Rest of Asia	1.3	0.6	0.7	0.4	0.2	0.0	0.3	0.2	0.1
Australia	1.2	0.3	0.2	0.2	0.1	0.0	0.1	0.1	0.0
Countries in South America	0.1	0.2	0.0	0.1	0.0	0.0	0.2	0.1	0.0
Countries in Africa	0.2	0.2	0.0	0.1	0.0	0.0	0.1	0.0	0.0

Favourite countries

Preferred countries from which to buy online

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
First place	USA	UK	UK	UK	Germany	Netherl.	China	UK	UK
Second place	China	USA	USA	Germany	USA	Germany	USA	Germany	Germany
Third place	Germany	China	China	USA	China	UK	UK	China	USA



PostNord – your partner for e-commerce

PostNord provides distribution solutions to countries all over the world. Outside the Nordics, PostNord has an established presence via its subsidiary Direct Link, which offers global delivery of products via its local branches in Australia, Germany, Hong Kong, Singapore, the United Kingdom and the United States. Direct Link helps e-commerce companies establish a presence in new markets, with everything from market analysis and direct marketing to fulfillment, product distribution and processing returns.

PostNord is also the biggest and most obvious partner for e-commerce in the Nordic market. We offer communication and logistics solutions to, from and within the Nordic region, and in 2014 we had net sales of SEK 40 billion and 38,000 employees. PostNord has a comprehensive offering for e-commerce, with a range of services in the areas of customer communication, product distribution and logistics.

We have a harmonized, Nordic logistics services offering, ranging from retail supplies and third-party

logistics to product distribution and returns processing. With the widest-ranging distribution network in the Nordic region, we shrink the distance between e-commerce and the end-customer. PostNord has about 5,800 distribution points, spread out evenly across Sweden, Denmark, Norway and Finland.

In Sweden and Denmark, our postal workers visit all households and companies every working day. PostNord offers services in third-party logistics, with high added value, combined with information technology in customer-oriented partnerships. Using fact-based customer insight, we enhance our customers' profitability by means of communication solutions and platforms that reach the right customer in the right channel at the right time.

Find out more at www.postnord.com and www.directlink.com.



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