

# E-commerce in Europe 2016



**postnord**

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## About this report

Since 2014 PostNord has conducted surveys of the European e-commerce market under the title E-commerce in Europe. The report is based on interviews with more than 12,000 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 of the countries the number of respondents was approximately 1,200. 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	1,278	594	576	1,276	1,231	1,223	579	1,190	1,292	1,180	585	1,202

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 November 2015. This is important as Internet penetration varies substantially between the different European countries. To calculate how many consumers shop online in each market, we used Eurostat’s population statistics for 2015 as a basis. To calculate the average purchase in euros, we applied the exchange rates from May 31, 2016 (and from May 24, 2015 for the comparative data). For more information about the methodology, please see the section in the report about detailed results.

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. Unless otherwise stated, in this report “the Nordics” therefore only refers to Denmark, Finland, Norway and Sweden. E-commerce is defined in this context as the purchase of physical products via the Internet. This means that online orders 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 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.

\*The Danish E-commerce Association

## Europe, a growing e-commerce market

### **E**-commerce in Europe is continuing to grow.

This report describes the e-commerce habits of European consumers, based on a survey conducted in 12 countries. A total of 253 million consumers in these countries stated that they shop online and that their online purchases in the past year amounted to a total value of EUR 189 billion, which is 9 billion more than during the preceding year.

In this report we map Europeans' e-commerce preferences - which products they prefer to buy, which countries they buy products from online and why, how they want to pay and how they want to have their purchases delivered. We have conducted this survey since 2014 and have noticed that e-commerce is continuing to increase in volume and that consumers have become increasingly mature. This creates major opportunities for players who want to enter into the European market, but also for e-commerce companies that are already established and want to expand to additional countries. As more online stores are becoming established and contributing to the range on offer, it is becoming even more essential for e-commerce companies to stand out from each other.

Our surveys and our experience from different markets show that it is becoming increasingly important in the delivery stage to meet consumers' needs in an innovative and flexible way. It is crucial to offer locally adapted, trouble-free delivery methods. Additionally, new types of delivery services are becoming increasingly common and more highly valued. For example a majority of consumers in four of the report's nine markets think that it is important to be able to alter the time of delivery after a product has been dispatched.

In the Swedish market we are currently testing several new types of delivery to simplify consumers' everyday lives. We are testing solutions in which products are delivered directly to the boot of the consumer's car or directly into their fridges without the consumers needing to be at home. Both types of deliveries are possible thanks to digital innovations.

Delivery is an important part of the shopping experience. As an e-commerce player you need a logistics partner that not only knows all about your domestic market, but also your export markets. PostNord is the obvious partner for e-commerce to, from and within the Nordics, and through our subsidiary, Direct Link, we help e-commerce players all over the world establish a presence in new markets. Our offer puts consumers' preferences first. Regardless of whether you sell clothing or garden furniture, we can provide delivery all the way to your customers.



**Håkan Ericsson**  
President and Group  
CEO of PostNord

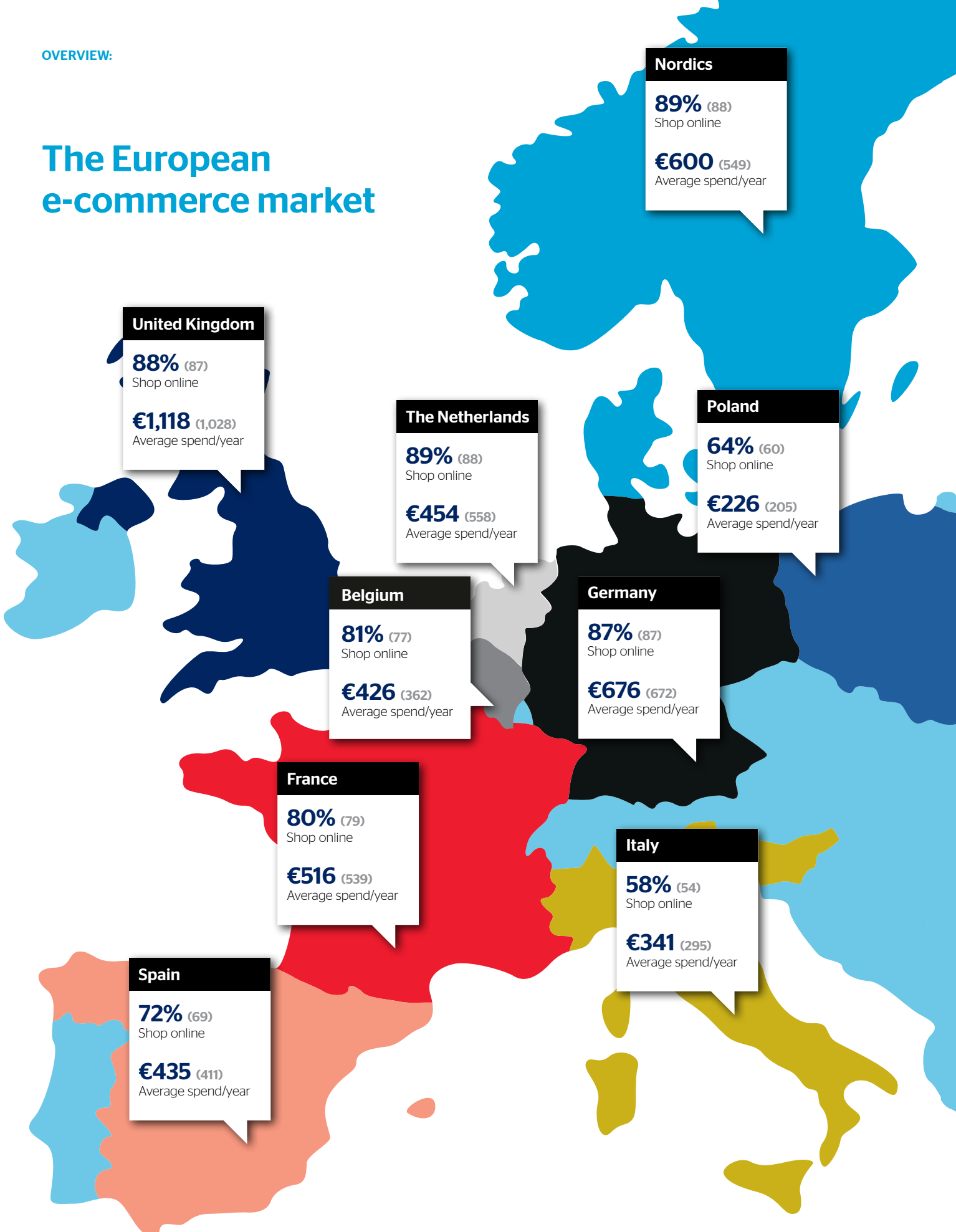
“It is crucial to offer locally adapted, trouble-free delivery methods. Additionally, new types of delivery services are becoming increasingly common and more highly valued.”

We hope that this report, E-commerce in Europe 2016, will give you insight and inspiration. The conclusion is clear: there are significant differences between the European countries, but also many similarities. PostNord can help you with market insight as well as with distribution.

### **Håkan Ericsson**

President and Group CEO of PostNord

# The European e-commerce market



The figures refer to the proportion of and average spend for the entire population aged 15-79. The proportion who shop online is calculated on the basis of the question, "Approximately how often do you buy products online?" (Base: The entire population aged 15-79) and defined as all respondents minus those who responded "Never" or "Unsure, don't know". This is the same method as used in previous editions of the E-commerce in Europe report.

Comparative figures from the preceding year are stated in parentheses.



In the surveyed markets...

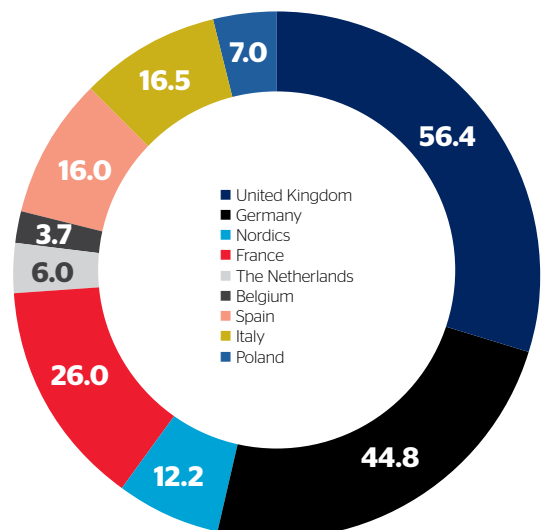
**253** million consumers shop online

**176** million consumers shop online from abroad

**189** billion euro is what Europeans estimate that they spent on online shopping in the past year

E-commerce in Europe in the past year (EUR billion)

Calculated based on the average answers of the respondents in each country to the question, "How much do you estimate that you have spent on buying products online in the past year?" (Base: Shop online)



“As requirements from consumers increase, the delivery stage is becoming an increasingly important way to create value.”

## “More consumer-driven logistics”

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

In the increasingly mature European e-commerce market more people are shopping online and turnover is increasing. What trends can you see?

At PostNord we're seeing two overall trends. The first is that e-commerce companies are being forced to think about availability and convenience for the consumer, driven on by major marketplaces such as Amazon, where consumers are offered a range of products in one place and the possibility of receiving very fast deliveries. The second trend is that increasing numbers of e-commerce players are selecting omnichannel strategies, i.e., offering a combination of physical shopping and online shopping. This can mean that the consumer purchases an item online and then collects it in the physical store, or shops online while in the physical store.

What are the primary differences and similarities between the European markets?

Above all, payments and delivery preferences differ from one country to another. Home delivery is widely used in many European countries, but we're noticing rising pressure on being able to offer additional alternatives. In the Nordics, deliveries to distribution points

are extensively used, whereas they are relatively uncommon in other countries. Notifications have also become something of a dividing line as there are strong preferences in the different countries. For example, consumers in Germany want to receive their delivery notification via e-mail.

What trends can you see in logistics?

I notice that logistics is becoming increasingly consumer-driven. Now that it has become normal to shop online, greater demands are placed on deliveries. Today's consumers want many alternatives and ongoing information about the delivery of their products - in principle they want to be able to direct it themselves. At PostNord we are therefore constantly working on measures such as improving our *track and trace* system. When we meet e-commerce players to discuss development opportunities for their online stores, our discussions are always based on the consumers' perspective - how they perceive the process and how the shopping experience can be made trouble-free. One logical consequence is that it is increasingly important to listen to and understand what consumers want. We're seeing that customer reviews are playing an ever larger part in this.

### Are there any countries that you think Europeans will buy more from online in the future?

On the whole, e-commerce in Europe has reached a stage of maturity. Consumers are buying roughly the same items online and from the same countries, although there are regional differences. For example, Danes buy a great deal of home electronics items in Germany as they are cheaper there. As long as the pricing structure and conditions of trading do not change significantly, such behavior will continue. However, I do see a country on the rise in the e-commerce market, and that is Turkey. Although the country is outside the EU, it has many skilled e-commerce players that may become of interest to consumers in the rest of Europe in the long term.

### What do you think the deliveries of the future will look like?

As requirements from consumers increase, the delivery stage is becoming an increasingly important way to create value. One prediction is that additional services will become increasingly common, for example also ordering the installation of new home electronics, or perhaps obtaining help with carrying a new sofa into your living room. I also predict that information services will increase - so that through our mobile phones we will be able to keep track of and direct our deliveries in a simple way.



**Arne Andersson**

E-commerce Expert at PostNord

## Six pieces of advice for success in Europe

### 1. Laws and rules

Ensure that you understand local regulations about e-commerce, marketing and personal data management.

### 2. Adapted (localized) local websites

When you translate your website into new languages, use professional translators who live in the countries where you are going to run your e-commerce.

### 3. Offer various payment options

European online shoppers want to pay in various ways. Find out what applies in your specific markets and offer a range of options.

### 4. Deliveries

Cooperate with a logistics partner who can help you with distribution in as many markets as possible.

### 5. Returns

Ensure that you offer your customers a simple and practical way of returning products.

### 6. Be local

Set up a customer service department that speaks the local language and can be reached on a local telephone number.



**Olof Källgren**

Market Information Manager at Direct Link

“One prediction is that additional services will become increasingly common, for example also ordering the installation of new home electronics, or perhaps obtaining help with carrying a new sofa into your living room.”

# Stable list of most popular products bought online

## Eleven out of twelve categories are growing in size

Clothing and footwear continue to dominate the list of the most popular items purchased online in Europe, followed by home electronics and books. Clothing and footwear are at the top in all markets except Italy, where consumers prefer to buy home electronics most of all. Compared to the preceding year, more people have shopped online in all product categories except for CDs, which dropped down several places on the list of the most popular products. The categories climbing the most are clothing and footwear, as well as cosmetics, and haircare and skincare.

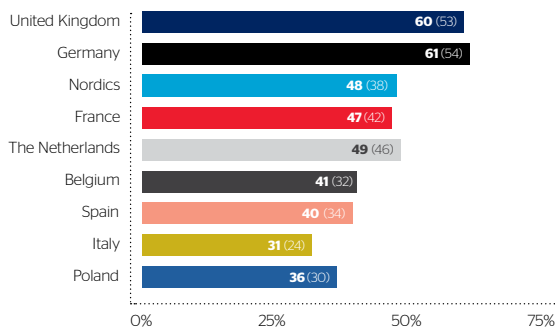
## Clothing and footwear increasing substantially

Online purchases of clothing and footwear are becoming increasingly common in all markets - especially in the Nordics, where the proportion who have purchased items in this product category online has risen by 10 percentage points compared to the preceding year. Belgium is also taking a big step upwards with an increase of 9 percentage points. The United Kingdom still dominates online food shopping, but the proportion of consumers who have purchased items online in this category is rising in nearly all other markets.

## Clothing and footwear are increasing significantly in all markets

Which types of products have you bought online in the past year? **Clothing/footwear (%)**

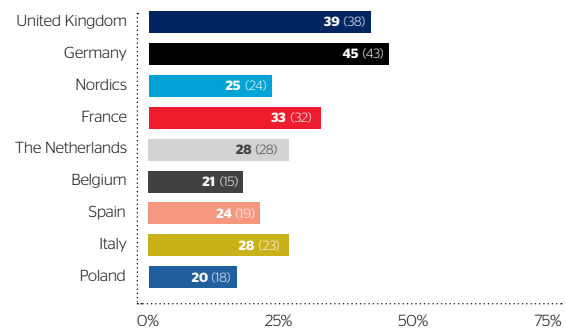
Base: Whole population aged 15-79



## Germany remains at the top regarding online purchases of books

Which types of products have you bought online in the past year? **Books (%)**

Base: Whole population aged 15-79

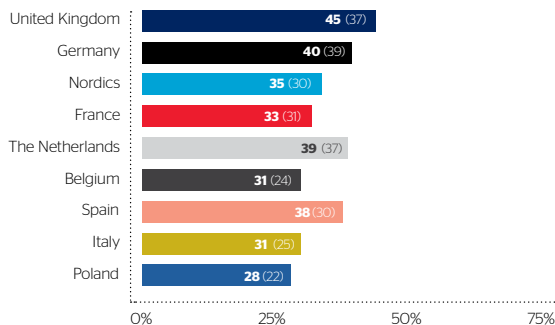


## The United Kingdom takes the lead in home electronics

Which types of products have you bought online in the past year?

### Home electronics (%)

Base: Whole population aged 15-79

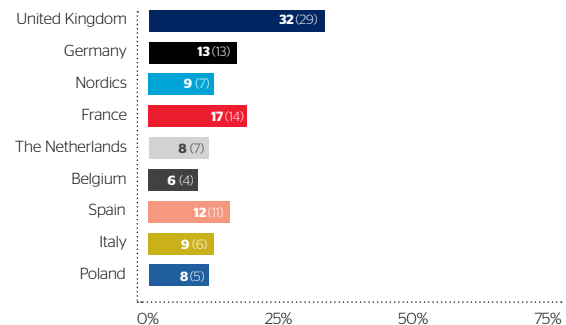


## Food is increasing - the United Kingdom remains at the top by a clear margin

Which types of products have you bought online in the past year?

### Food (%)

Base: Whole population aged 15-79

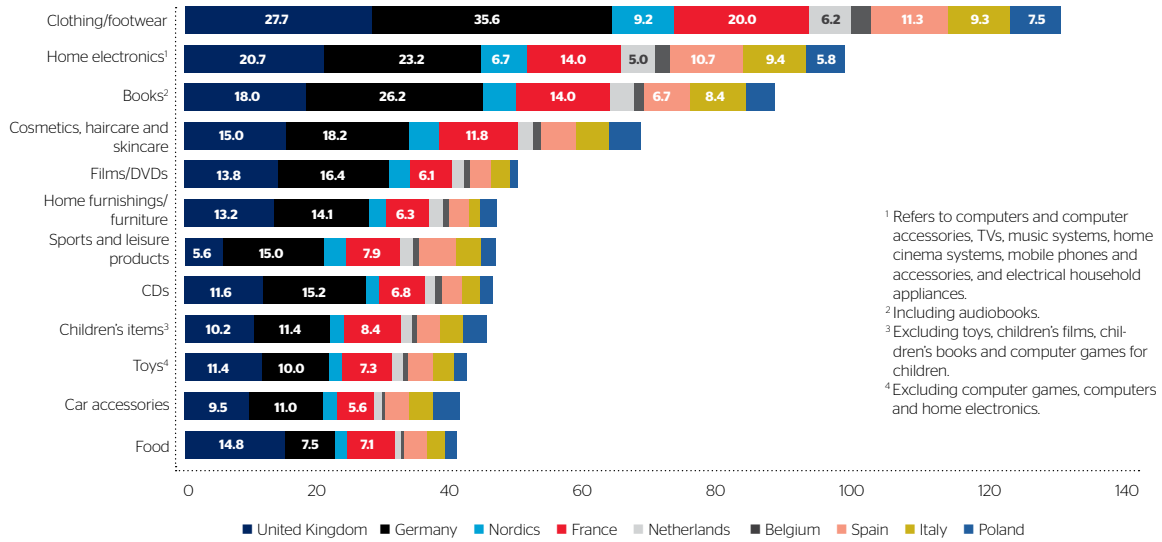




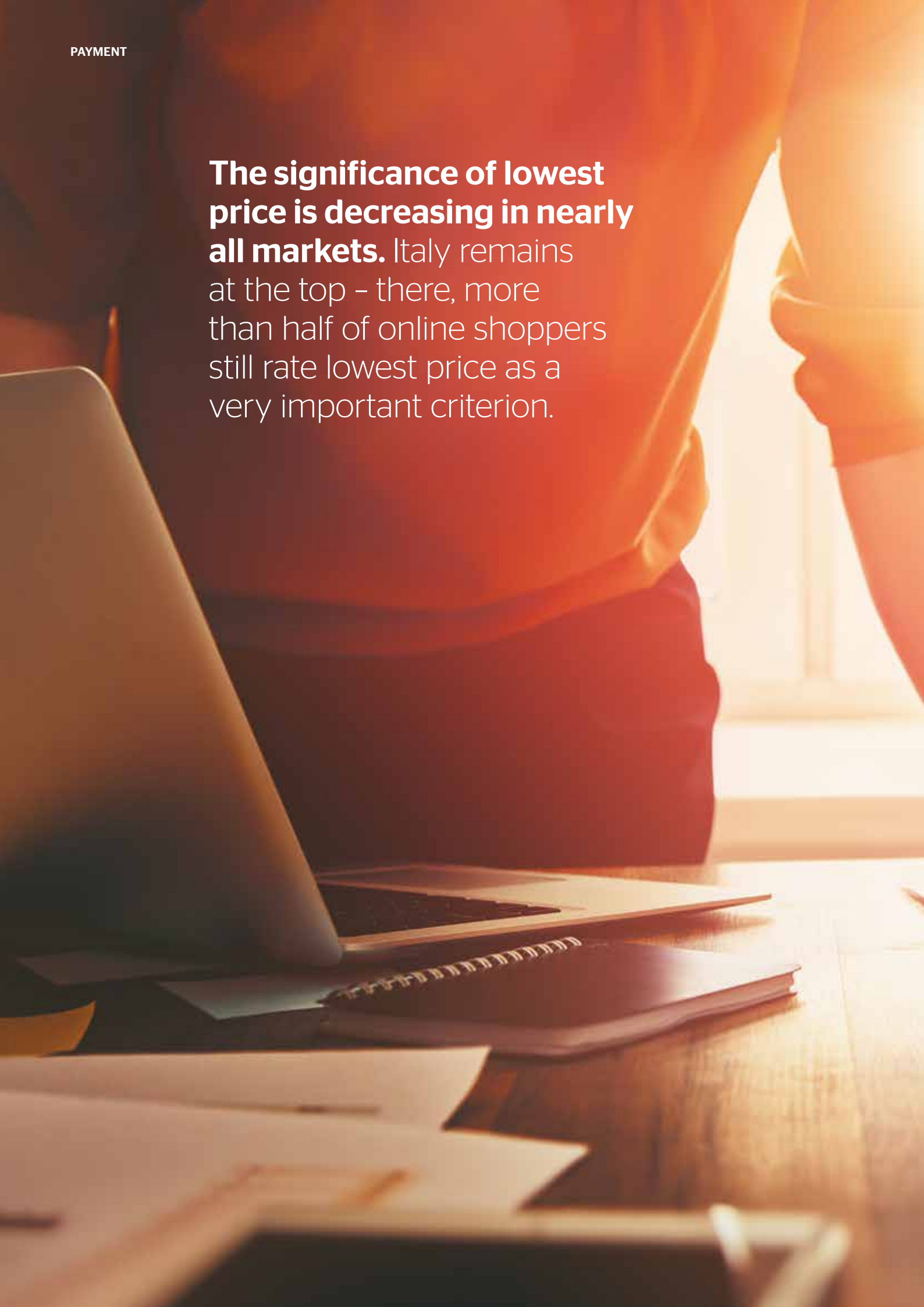
**Clothing and footwear, cosmetics, haircare and skincare are increasing the most**

The number of consumers who have shopped online in the categories below in the past year  
(Millions of people)

Calculated based on the answers of the respondents in each country to the question "Which types of products have you bought online in the past year?" (Base: Shop online)



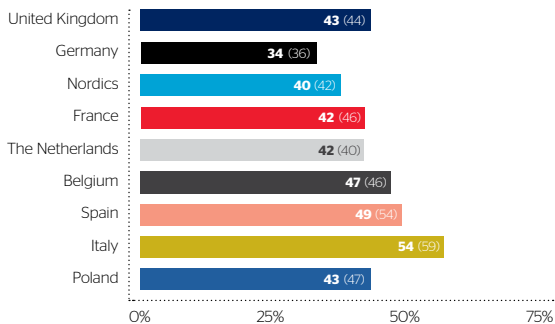
**The significance of lowest price is decreasing in nearly all markets.** Italy remains at the top - there, more than half of online shoppers still rate lowest price as a very important criterion.



**It is becoming less important for an online store to offer the lowest price**

How important are the following factors when you decide which online store/website to buy an item from? Lowest price (Proportion who responded "very important", %)

Base: Shop online



## Localized payments a key to success

### Different but stable preferences

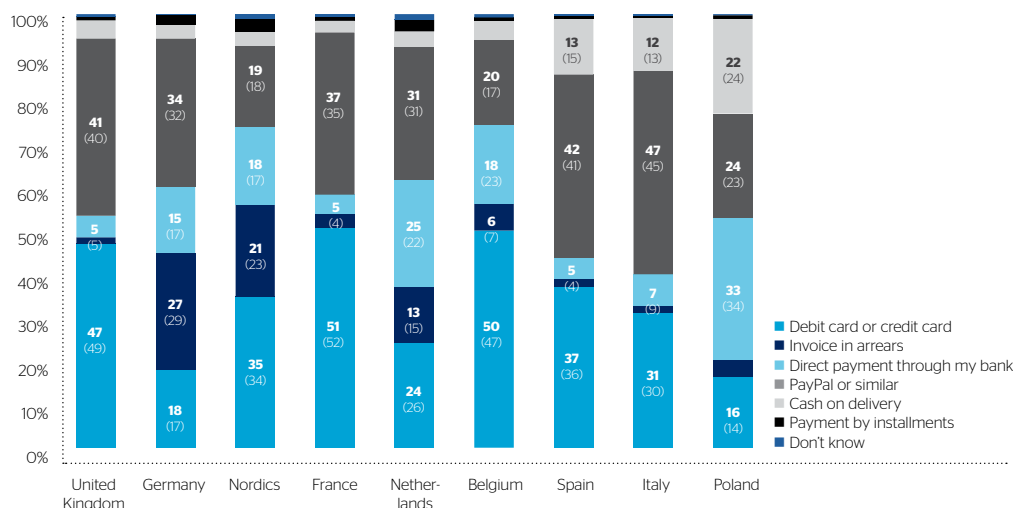
There is a trend among European consumers to attach less importance to whether an online store offers the lowest price. On the other hand there is some fragmentation in how they want to pay for the items that they buy online. In Spain and Italy consumers prefer to pay using PayPal or similar services - which is also popular in the United Kingdom and France, although the vast majority prefer

to pay using a debit or credit card. In Germany and the Nordics an invoice is a popular choice. In Poland, Spain and Italy online shoppers want the option of being able to pay using cash on delivery. In several markets many people also want to use a direct payment option. This is particularly common in Poland, the Netherlands and Belgium, but also in the Nordics.

### Considerable variations in payment preferences

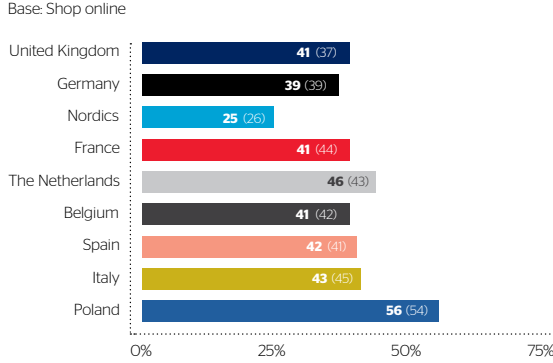
Which of the following methods do you prefer to use when you pay for a product that you have bought online? (%)

Base: Shop online



**Fast deliveries are most important in Poland and least important in the Nordics**

How important are the following factors when you decide which online store/website to buy an item from?  
Fast deliveries (max. three days)  
(Proportion who responded "very important", %)



56%

**This proportion of Polish online shoppers think that it is very important to have fast deliveries (max. three days).**

**Wide variation in preferred delivery options**

**The expectations of very fast deliveries are increasing**

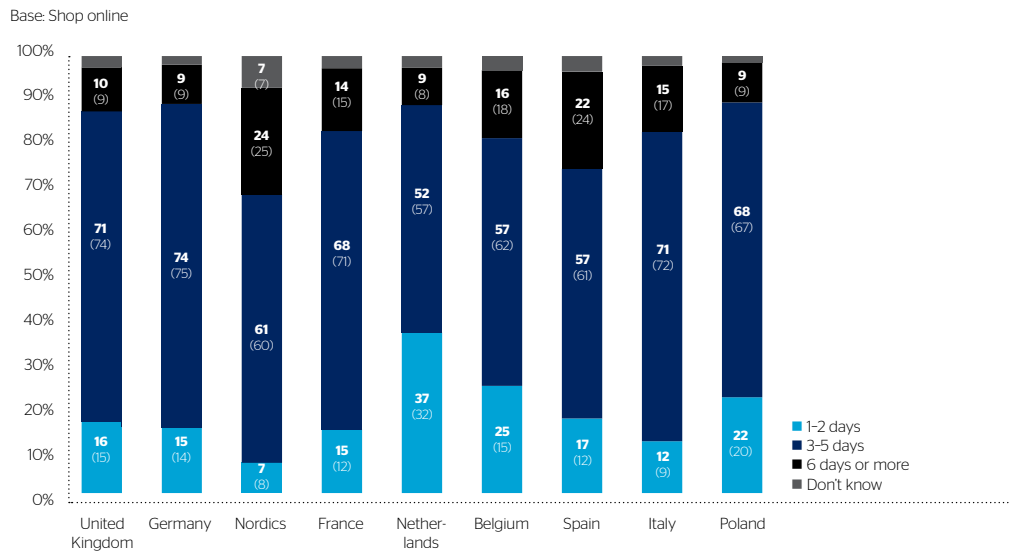
It is becoming increasingly important to offer customers fast deliveries. Demands for deliveries within 1-2 days are growing in most of the markets. The most impatient online shoppers are in the Netherlands - no fewer than 37% want to receive their products in a maximum of two days. Shoppers in the Nordic countries are the most patient. This is where there is the largest proportion who are prepared to wait for six days or more, although the majority of the consumers - just like in all the other markets - expect delivery in 3-5 days.

**Different preferences for delivery methods**

There are clear differences in how consumers want to have their purchases delivered. In 6 out of 9 markets consumers prefer daytime home delivery by courier. In Germany, the Nordics and France, however, online shoppers state delivery to their mail boxes as their preferred first choice. In the Nordics and France, consumers' second choice is to collect the parcel themselves from a service point, and daytime home delivery is their third choice.

**Increasing numbers of consumers expect delivery in 1-2 days**

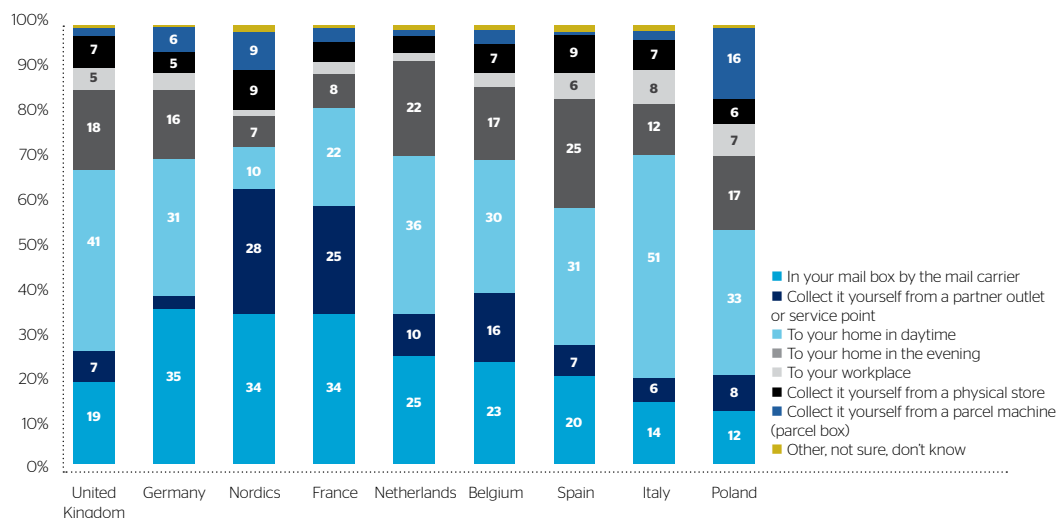
When you order a product online, what are your expectations of the delivery time, i.e., what is the maximum number of days it should take for you to receive the product? (%)



### Delivery preferences vary widely

When you order a product online, how would you prefer to have it delivered? (%)

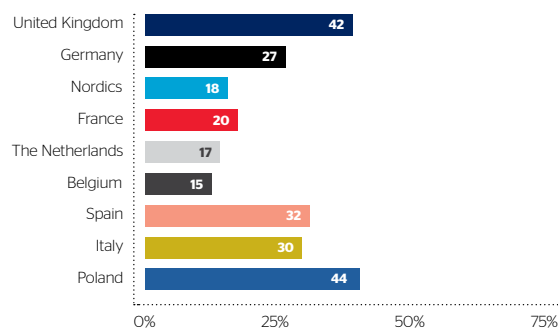
Base: Shop online



### Polish and British shoppers are most willing to pay for next-day delivery

Are you willing to pay for faster delivery (on the next day)? (The proportion who responded "yes", %)

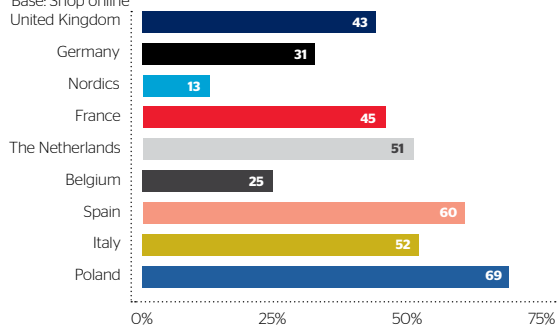
Base: Shop online



### Wide variations in requests for flexible deliveries

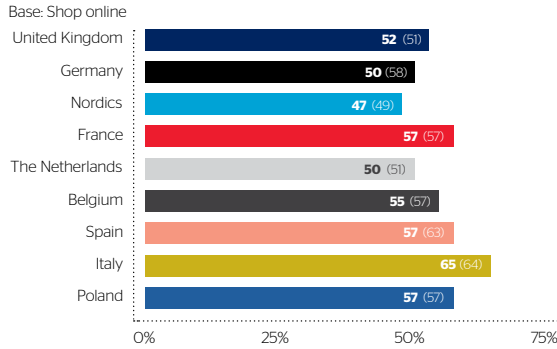
Is it important to you to be able to change the delivery date or time after your purchases have been dispatched from the online store? (The proportion who responded "yes", %)

Base: Shop online



**Clear procedures for returns most important in Italy**

How important are the following factors when you decide which online store/website to buy an item from? Clear information about procedures for returns (Proportion who responded "very important", %)



\* Comparisons with the preceding year should be made with a degree of caution because the formulation of the question has been altered slightly.

**46%**

**The proportion of the German population who returned an online purchase in the past year.**

**Increasing numbers of people are returning products**

**Clothing and footwear are returned the most**

European consumers are shopping online to an ever increasing extent, and consequently increasing numbers of shoppers are returning items that they have purchased online. This is most common in Germany, where 46% of the population have returned an online purchase in the past year. The lowest figures were recorded in Poland and Italy, amounting to 17% and 19%, respectively. By far the most returns are made in the clothing and footwear product category, followed by home electronics.

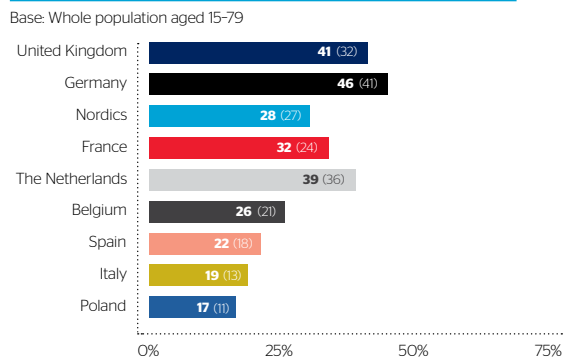
**Trouble-free procedure is important**

The increasingly mature European online shoppers place demands on trouble-free returns. A clear majority in all markets assume that it is possible to return an item bought online, and about half of the online shoppers state that clear procedures for returns are very important.



**Increasing numbers of people are returning products bought online**

Have you at some point during the past year returned an item that you bought online? (The proportion who responded "yes", %)

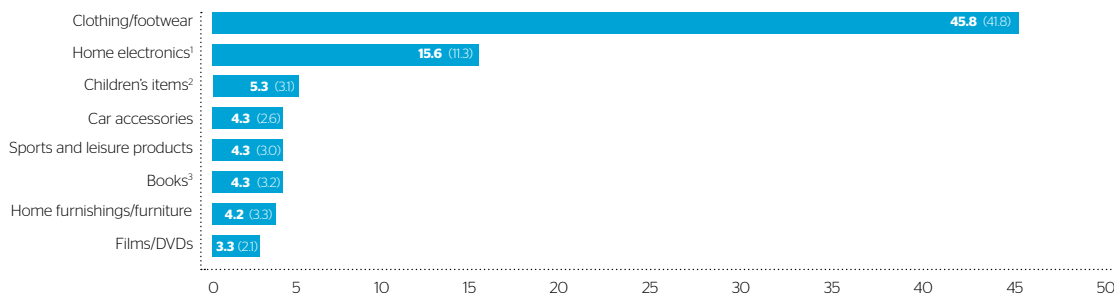




### Returns of clothing and footwear are by far the most common

The number who returned an item in the categories below in the past year (Millions of people)

Calculated from the questions, "Have you returned an online purchase during the past year?" (Base: Shop online) and, "Which types of products have you returned?" (Base: Have returned an online purchase in the past year)



<sup>1</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.

<sup>2</sup> Excluding toys, children's films, children's books and computer games for children.

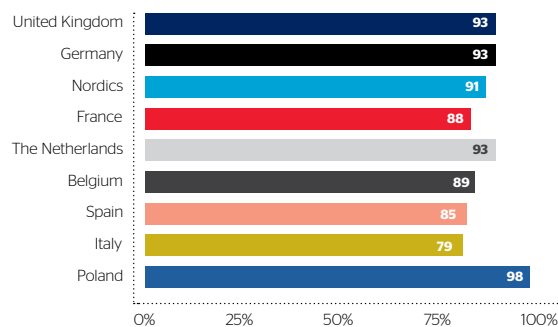
<sup>3</sup> Including audiobooks.

### The vast majority assume that an item purchased online can be returned

Do you assume that it is possible to return an item purchased online?

(The proportion who responded "yes", %)

Base: Shop online

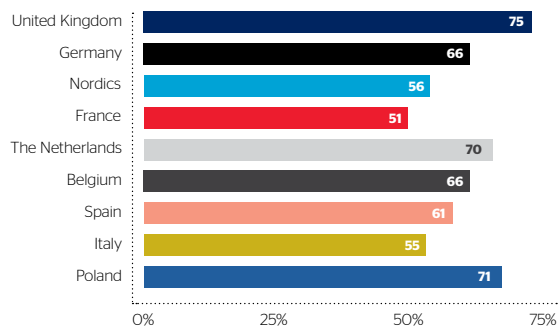


### The majority think that online stores have procedures for returns that are easy to understand

Do you think in general that it is easy to understand the procedures for returns on the websites of online stores?

(The proportion who responded "yes", %)

Base: Shop online



# Shopping online from abroad is flourishing in Europe

## E-commerce from abroad is becoming increasingly common

The proportion who shop online from abroad is growing in all markets. The consumers most keen to buy from abroad are in the Nordics, followed by British and Belgian shoppers. The largest increase from the preceding year was recorded in Poland, by 12 percentage points. The proportions in Belgium and Spain have also increased more than in most of the other countries, by 8 and 7 percentage points, respectively.



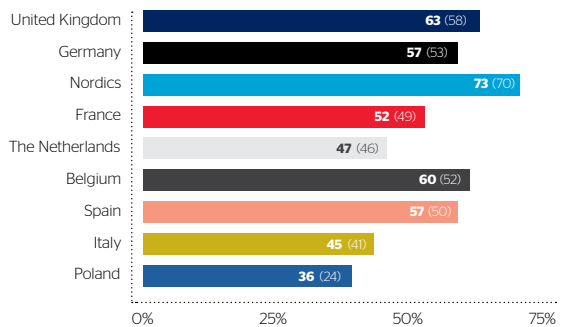
## Lower prices drive purchases from abroad

In eight out of nine markets the hunt for lower prices is the primary incentive that drives consumers to shop online from abroad. In Germany, however, the main reason is that consumers can find products in another country that are not found elsewhere. This is also a strong driving force in the other markets. In Poland a significant proportion, more than a fifth, also state that they are looking for a wide range of products. An almost equally high proportion in the United Kingdom state that they are looking for a specific brand.

## Purchases from abroad are growing most in Poland

Approximately how often do you buy products online from abroad? (Proportion who shop online from abroad, i.e., all respondents minus those who stated, "Never" or, "Not sure, don't know", %)

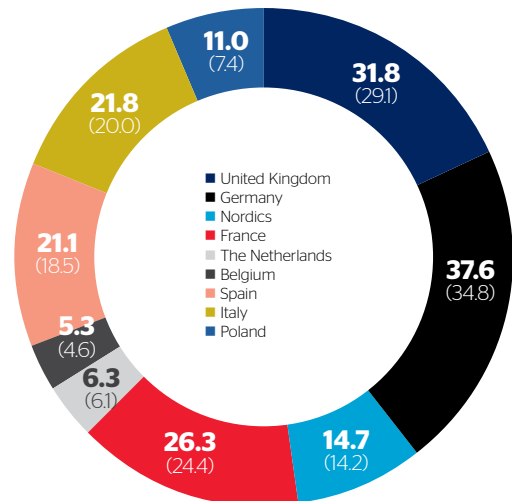
Base: Whole population aged 15-79



## Increasing numbers of people shop online from abroad

Number who shop online from abroad (Millions of people)

Calculated from the question, "Approximately how often do you buy products online from abroad?" (Base: Shop online)







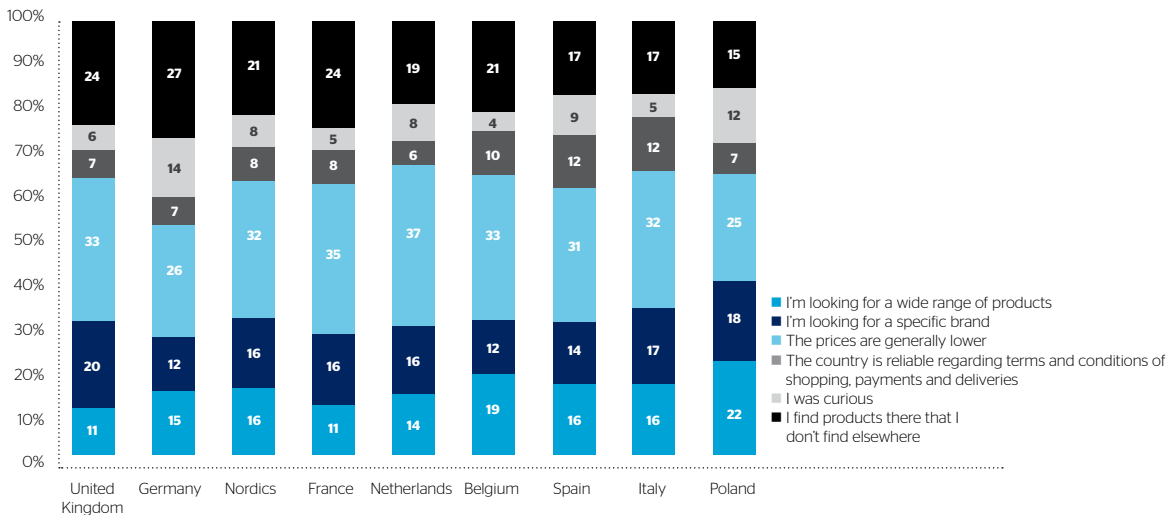
# 1/5

The proportion of the Polish population who turned to online stores abroad to gain access to a large range of products.

### In general, lower prices are the strongest driver for purchases from abroad

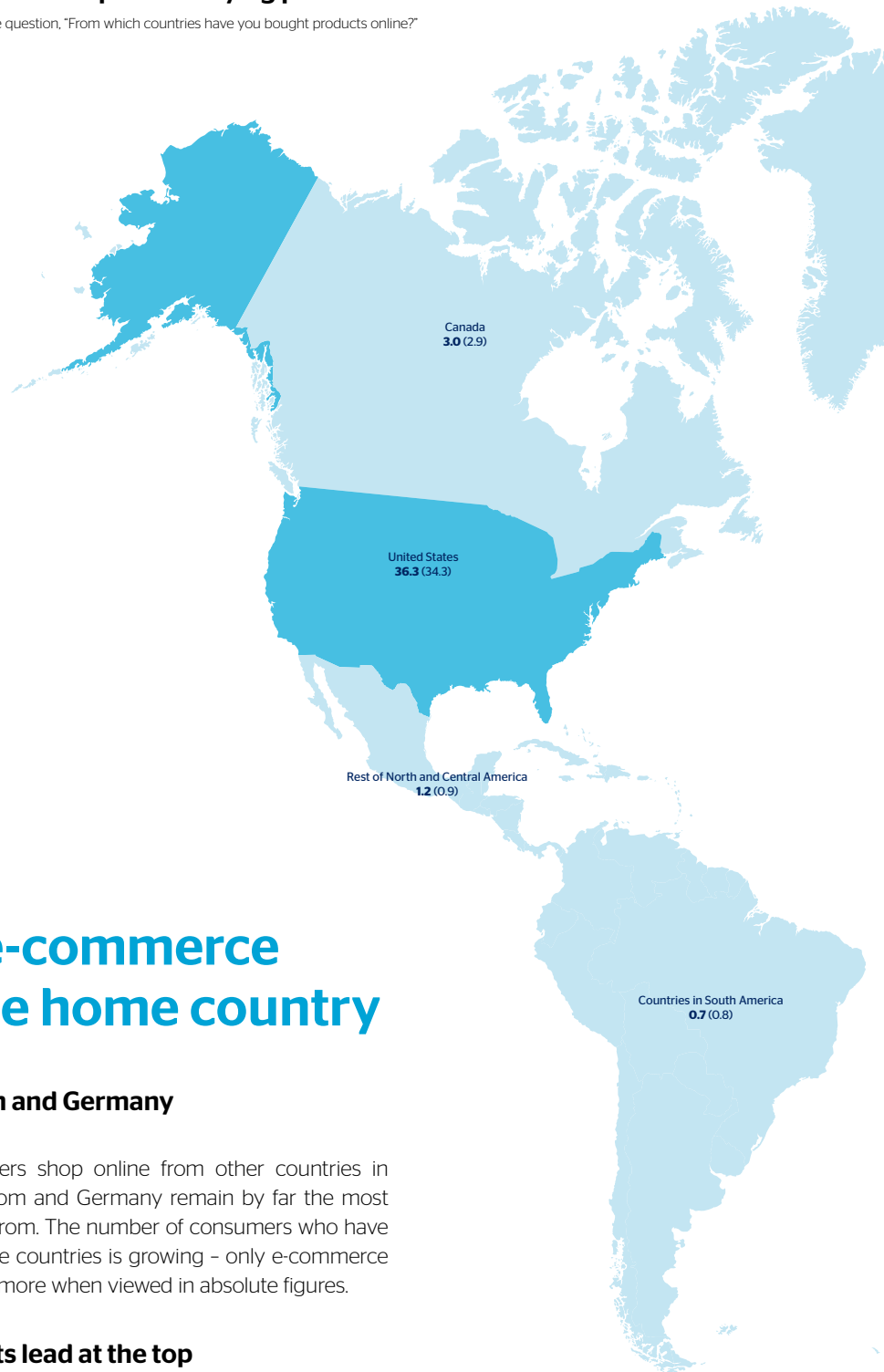
Why have you shopped online from your chosen countries? (%)

Base: Shop online from abroad



## This is where Europeans shop when buying products online from abroad

Millions of people. Calculated from the question, "From which countries have you bought products online?"  
(Base: Shop online from abroad)



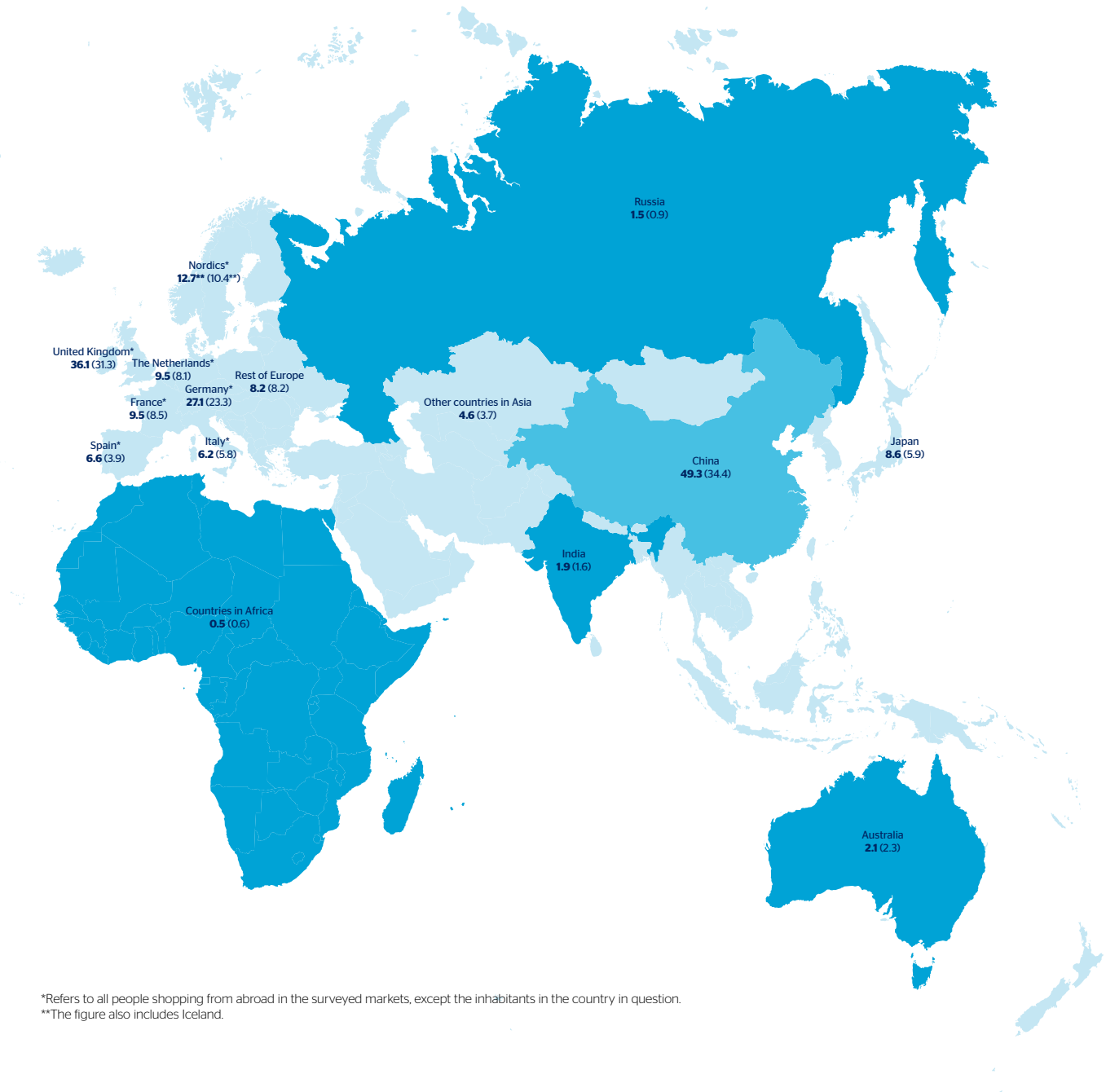
## Growing e-commerce outside the home country

### The United Kingdom and Germany dominate in Europe

When European consumers shop online from other countries in Europe, the United Kingdom and Germany remain by far the most popular countries to buy from. The number of consumers who have shopped online from these countries is growing – only e-commerce from China has increased more when viewed in absolute figures.

### China is increasing its lead at the top

So far, European consumers have not shopped extensively online from Australia or Africa, but they have from Asia. In the survey the largest number of European consumers shopped online from China. This means that China is substantially increasing its lead over the United States, which nearly shared first place with China in the preceding year's report. E-commerce from Japan, India and other Asian countries is also growing.

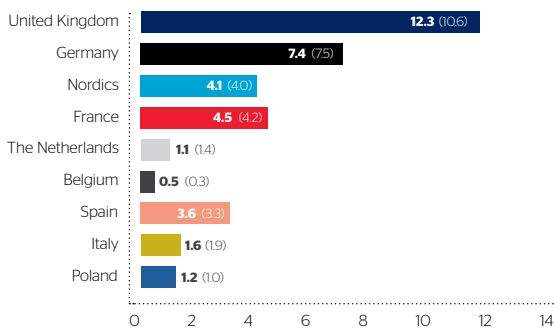


\*Refers to all people shopping from abroad in the surveyed markets, except the inhabitants in the country in question.  
 \*\*The figure also includes Iceland.

### British consumers account for the majority of increased online sales from the United States

Number of consumers who have shopped online from the United States (Millions of people)

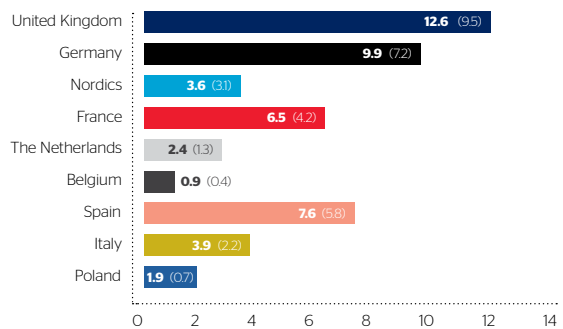
Calculated from the question, "From which countries have you bought products online?" (Base: Shop online from abroad)



### E-commerce from China is growing in all countries

Number of consumers who have shopped online from China (Millions of people)

Calculated from the question, "From which countries have you bought products online?" (Base: Shop online from abroad)





## United Kingdom



Capital city  
Population 15-79 years old  
Language(s)  
Currency  
Internet penetration  
Proportion of the population who shop online\*  
Proportion who have shopped online via a smartphone or tablet\*\*

**London**  
**50.4 million**  
**English**  
**GBP**  
**92%**  
**88%**  
**59%**

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year

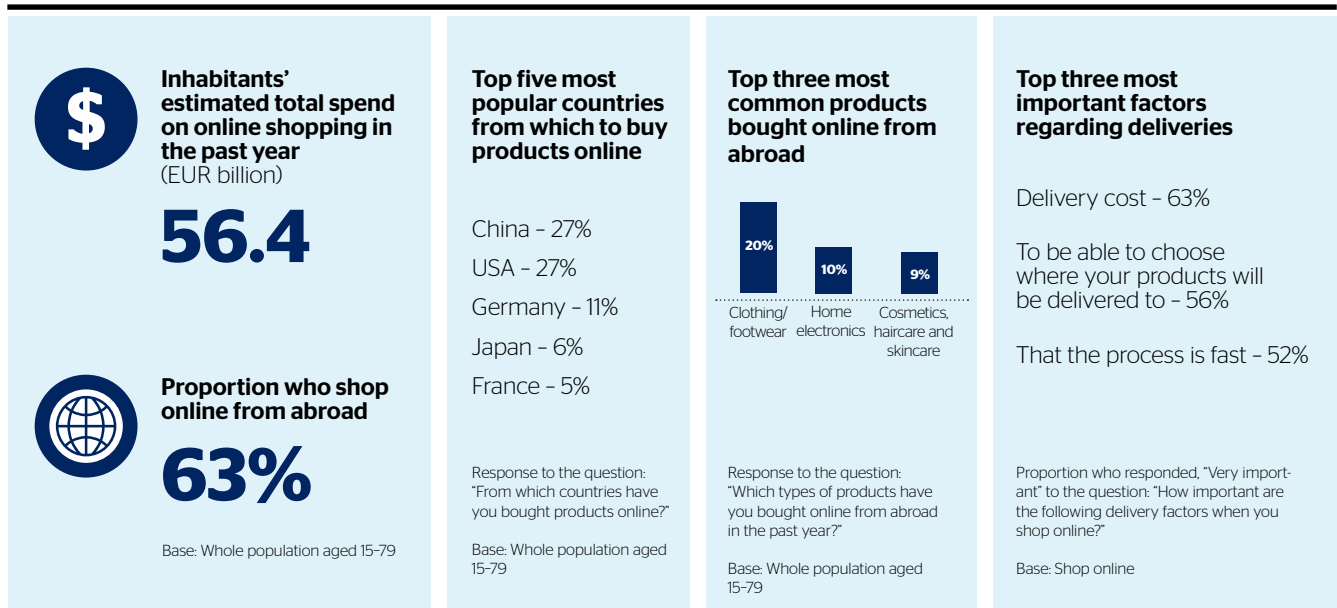
# British consumers like to shop online from far-flung destinations

## Largest in terms of e-commerce from mobile platforms

The United Kingdom is characterized by a high level of Internet penetration and a high proportion of the population who shop online. Compared to other markets, the country also has a high proportion of people, 59%, who shopped online via a smartphone or tablet in the past year. When the British shop online they buy clothing and footwear and home electronics, closely followed by books - which have, however, slipped down to third place on the list of the most popular product categories. The clothing and footwear category has grown by 7 percentage points, while home electronics has grown by 8 percentage points.

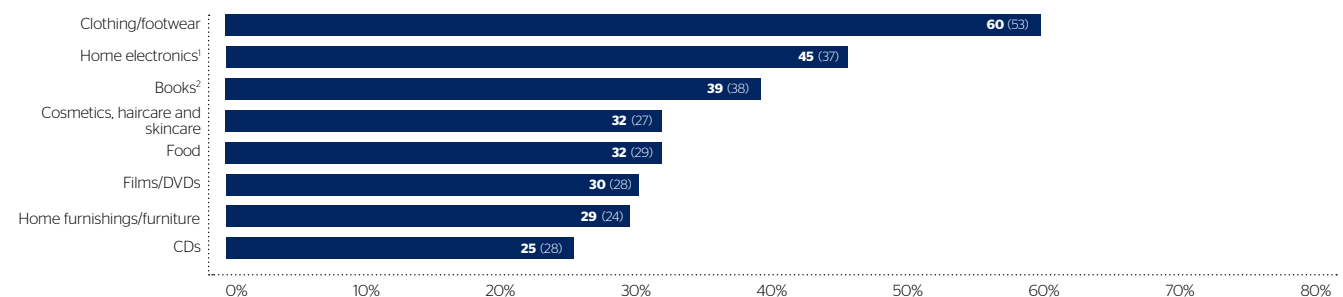
## China and the United States at the top by a clear margin

In principle the same product categories apply in e-commerce from abroad, except British consumers prefer to buy cosmetics and haircare and skincare from abroad rather than books. A total of 63% of the population shop online from abroad. By far the most popular countries to buy from are China and the United States, from which nearly a third of the population have bought items online. The popularity of both of these countries among UK shoppers differentiates British shoppers from their European neighbors. In terms of deliveries, the British rate the cost as the most important factor.



## Which types of products have you bought online in the past year? (United Kingdom, %)

Base: Whole population aged 15-79



<sup>1</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.  
<sup>2</sup> Including audiobooks.

# Germany



Capital city  
Population 15-79 years old  
Language(s)  
Currency  
Internet penetration  
Proportion of the population who shop online\*  
Proportion who have shopped online via a smartphone or tablet\*\*

**Berlin**  
**66.2 million**  
**German**  
**EUR**  
**88%**  
**87%**  
**44%**

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year.

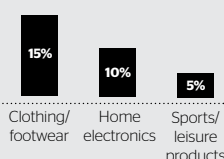
# Germany chooses China

## Nearly everyone who has Internet access shops online

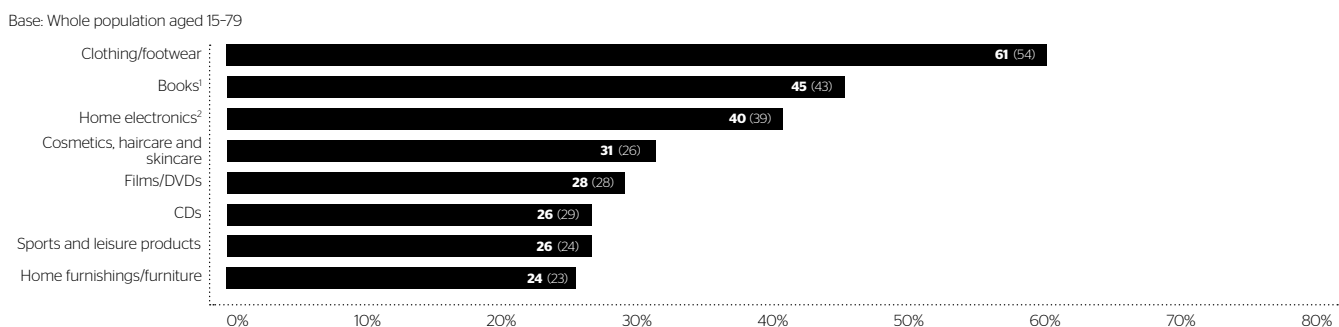
Germany is a developed market, where a very high proportion of those who have Internet access also shop online. When Germans shop online, their top category is clothing and footwear, followed by books and home electronics. In particular, online shopping for clothing and footwear is increasing significantly compared to the preceding year – a rise of 7 percentage points. Online purchases of cosmetics, haircare and skincare are also increasing compared to earlier years, by a total of 5 percentage points. CDs are a falling category.

## Delivery cost is less important relatively speaking

When German consumers shop online from abroad, their preferred purchases are clothing and footwear as well as home electronics, but sports and leisure products are also popular – which differentiates Germans from other markets in the survey. German consumers’ favorite countries to shop from are China, the United Kingdom and the United States. When it comes to deliveries, Germans are primarily concerned about the delivery cost. However, compared to other markets, only a relatively low proportion state that the delivery cost is “very important”.

<p><b>\$</b> <b>Inhabitants’ estimated total spend on online shopping in the past year (EUR billion)</b></p> <p><b>44.8</b></p> <p><b>🌐</b> <b>Proportion who shop online from abroad</b></p> <p><b>57%</b></p> <p><small>Base: Whole population aged 15-79</small></p>	<p><b>Top five most popular countries from which to buy products online</b></p> <p>China - 17%</p> <p>United Kingdom - 15%</p> <p>United States - 13%</p> <p>Netherlands - 5%</p> <p>France - 4%</p> <p><small>Response to the question: "From which countries have you bought products online?"</small></p> <p><small>Base: Whole population aged 15-79</small></p>	<p><b>Top three most common products bought online from abroad</b></p>  <p><small>Response to the question: "Which types of products have you bought online from abroad in the past year?"</small></p> <p><small>Base: Whole population aged 15-79</small></p>	<p><b>Top three most important factors regarding deliveries</b></p> <p>Delivery cost - 53%</p> <p>That the process is fast - 39%</p> <p>To be able to choose where your products will be delivered to - 33%</p> <p><small>Proportion who responded, "Very important" to the question: "How important are the following delivery factors when you shop online?"</small></p> <p><small>Base: Shop online</small></p>
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## Which types of products have you bought online in the past year? (Germany, %)



<sup>1</sup> Including audiobooks.

<sup>2</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.



## Nordics



	Norway	Denmark	Finland	Sweden
Capital city	Oslo	Copenhagen	Helsinki	Stockholm
Population 15-79 years old				<b>20.3 million</b>
Language(s)	<b>Norwegian</b>	<b>Danish</b>	<b>Finnish</b>	<b>Swedish</b>
Currency	<b>NOK</b>	<b>DKK</b>	<b>EUR</b>	<b>SEK</b>
Internet penetration				<b>95%*</b>
Proportion of the population who shop online**				<b>89%*</b>
Proportion who have shopped online via a smartphone or tablet***				<b>39%*</b>

\*Weighted average for the four countries

\*\*Base: Whole population aged 15-79

\*\*\*Base: Whole population aged 15-79. Refers to the past year.



# E-commerce from abroad is very popular

## Three out of four shop online from other countries

The Nordics are characterized by a very high level of Internet penetration, a high proportion of consumers who shop online and a very high proportion who shop online from abroad. Fewer have shopped using a smartphone or tablet, however. When Danes, Finns, Norwegians and Swedes shop online they mostly buy clothing and footwear, a category that also grew by 10 percentage points compared to the preceding year. The next most popular categories are home electronics and books. The only category that is not growing is films/DVDs.

## United Kingdom most popular

When people in the Nordics shop online from abroad, they choose clothing and footwear, home electronics and cosmetics as well as haircare and skincare. The United Kingdom and United States are their favorite countries to buy from, followed by China and Germany. In deliveries, cost is the most important factor, followed by the option of being able to choose where to have your purchases delivered to.

**Inhabitants' estimated total spend on online shopping in the past year**  
(EUR billion)

# 12.2

**Top five most popular countries from which to buy products online**

- United Kingdom - 24%
- United States - 21%
- China - 19%
- Germany - 17%
- Sweden\* - 15%

\* Weighted average for Denmark, Finland and Norway (i.e., excluding Sweden).

Response to the question: "From which countries have you bought products online?"

Base: Whole population aged 15-79

**Top three most common products bought online from abroad**

Response to the question: "Which types of products have you bought online from abroad in the past year?"

Base: Whole population aged 15-79

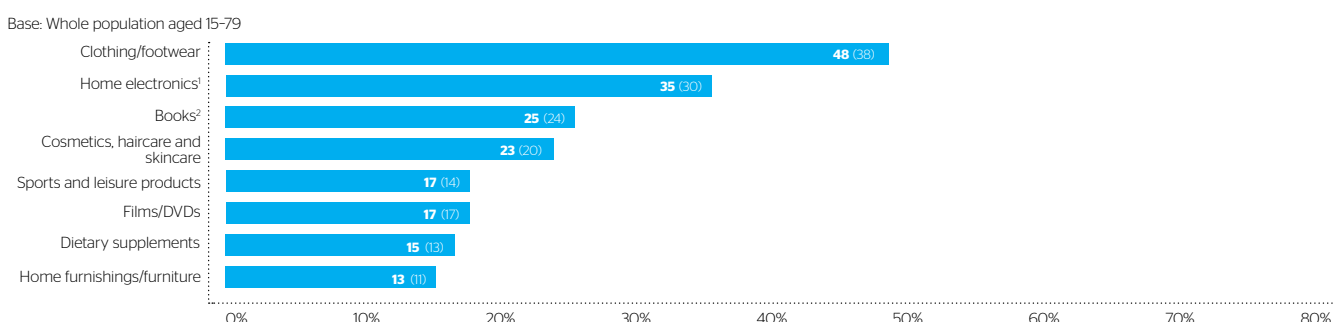
**Top three most important factors regarding deliveries**

- Delivery cost - 57%
- To be able to choose where your products will be delivered to - 41%
- To know the day and time of delivery at the time of purchase - 28%

Proportion who responded, "Very important" to the question: "How important are the following delivery factors when you shop online?"

Base: Shop online

## Which types of products have you bought online in the past year? /Nordics, %)



<sup>1</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.  
<sup>2</sup> Including audiobooks.



## France



Capital city  
Population 15-79 years old  
Language(s)  
Currency  
Internet penetration  
Proportion of the population who shop online\*  
Proportion who have shopped online via a smartphone or tablet\*\*

**Paris**  
**50.3 million**  
**French**  
**EUR**  
**84%**  
**80%**  
**33%**

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year.

# Delivery cost very important

## Children's items among most popular product categories bought online

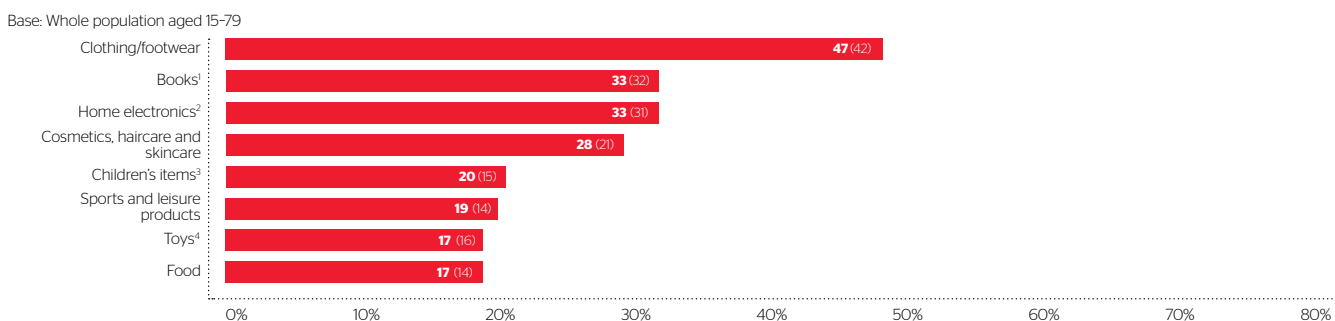
France has a relatively high level of Internet penetration and a high proportion of consumers who shop online. About half of the population shop online from abroad. The most popular product category in online shopping from abroad is clothing and footwear, followed by home electronics and children's items. The fact that children's items are among the most popular categories differentiates the French from other markets in the survey. When the French shop online from abroad, the United Kingdom, China and their neighboring country, Germany, top the list. The United States is also a popular country from which to shop online.

## Cosmetics, haircare and skincare gaining ground

In online shopping as a whole, clothing and footwear are a large category. Books and home electronics are very close to each other in second and third place, respectively. Cosmetics, haircare and skincare are displaying the strongest growth of all categories, amounting to 7 percentage points. Regarding deliveries, 70% state that the delivery cost is a very important factor. A large proportion also think that it is very important to be able to choose where their delivery will take place.

<p><b>Inhabitants' estimated total spend on online shopping in the past year</b> (EUR billion)</p> <p><b>26.0</b></p> <p><b>Proportion who shop online from abroad</b></p> <p><b>52%</b></p> <p>Base: Whole population aged 15-79</p>	<p><b>Top five most popular countries from which to buy products online</b></p> <p>United Kingdom - 18%</p> <p>China - 15%</p> <p>Germany - 13%</p> <p>United States - 11%</p> <p>Spain - 3%</p> <p>Response to the question: "From which countries have you bought products online?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most common products bought online from abroad</b></p> <p>Response to the question: "Which types of products have you bought online from abroad in the past year?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most important factors regarding deliveries</b></p> <p>Delivery cost - 70%</p> <p>To be able to choose where your products will be delivered to - 62%</p> <p>That the process is fast - 44%</p> <p>Proportion who responded, "Very important" to the question: "How important are the following delivery factors when you shop online?"</p> <p>Base: Shop online</p>
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## Which types of products have you bought online in the past year? (France, %)



<sup>1</sup> Including audiobooks.  
<sup>2</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.  
<sup>3</sup> Excluding toys, children's films, children's books and computer games for children.  
<sup>4</sup> Excluding computer games, computers and home electronics.

## The Netherlands



Capital city	<b>Amsterdam</b>
Population 15-79 years old	<b>13.3 million</b>
Language(s)	<b>Dutch</b>
Currency	<b>EUR</b>
Internet penetration	<b>96%</b>
Proportion of the population who shop online*	<b>89%</b>
Proportion who have shopped online via a smartphone or tablet**	<b>40%</b>

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year.

# A mature e-commerce nation

## China most popular

In the Netherlands the level of Internet penetration is very high, as is the proportion of the population who shop online. About half of those who shop online also do so from abroad. When Dutch consumers shop online from other countries they primarily buy clothing and footwear and home electronics, followed by cosmetics, haircare and skincare. China is the country from which Dutch consumers mostly shop online, followed by Germany and the United Kingdom.

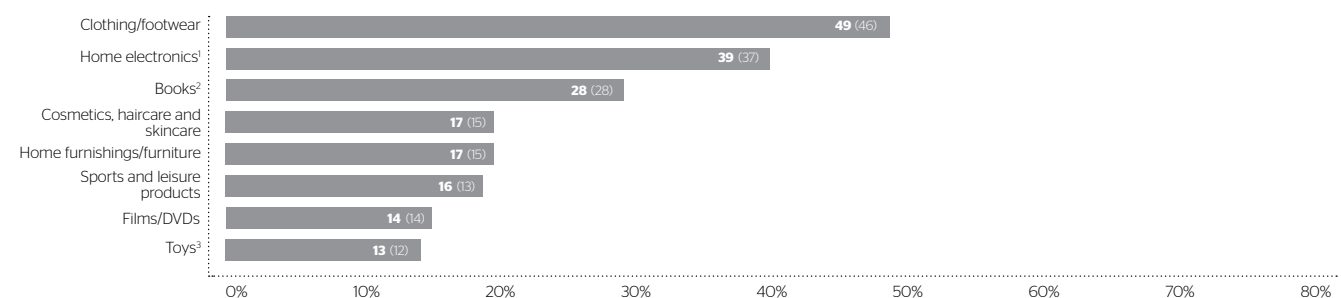
## Predictable and fast deliveries are important

When consumers in the Netherlands shop online their preferences resemble those of consumers in other markets: footwear and clothing, home electronics and books are the most popular products, although books are decreasing slightly. Regarding deliveries, Dutch consumers attach nearly as much importance to a fast delivery process and knowing the day and time of delivery at the time of purchase, as they do to the delivery cost.

<p><b>\$</b> <b>Inhabitants' estimated total spend on online shopping in the past year</b> (EUR billion)</p> <p><b>6.0</b></p> <p><b>🌐</b> <b>Proportion who shop online from abroad</b></p> <p><b>47%</b></p> <p>Base: Whole population aged 15-79</p>	<p><b>Top five most popular countries from which to buy products online</b></p> <p>China - 19%</p> <p>Germany - 13%</p> <p>United Kingdom - 11%</p> <p>United States - 9%</p> <p>Japan - 2%</p> <p>Response to the question: "From which countries have you bought products online?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most common products bought online from abroad</b></p> <p>Response to the question: "Which types of products have you bought online from abroad in the past year?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most important factors regarding deliveries</b></p> <p>Delivery cost - 53%</p> <p>To know the day and time of delivery at the time of purchase - 52%</p> <p>That the process is fast - 51%</p> <p>Proportion who responded: "Very important" to the question: "How important are the following delivery factors when you shop online?"</p> <p>Base: Shop online</p>
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## Which types of products have you bought online in the past year? (The Netherlands, %)

Calculated based on the answers of the respondents in each country to the question "Which types of products have you bought online in the past year?" (Base: Shop online)



<sup>1</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.

<sup>2</sup> Including audiobooks.

<sup>3</sup> Excluding toys, children's films, children's books and computer games for children.



# Belgium



Capital city	<b>Brussels</b>
Population 15-79 years old	<b>8.7 million</b>
Language(s)	<b>French/Dutch</b>
Currency	<b>EUR</b>
Internet penetration	<b>85%</b>
Proportion of the population who shop online*	<b>81%</b>
Proportion who have shopped online via a smartphone or tablet**	<b>27%</b>

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year.

# Prefer to shop from neighboring countries

## Local preferences mixed with global ones

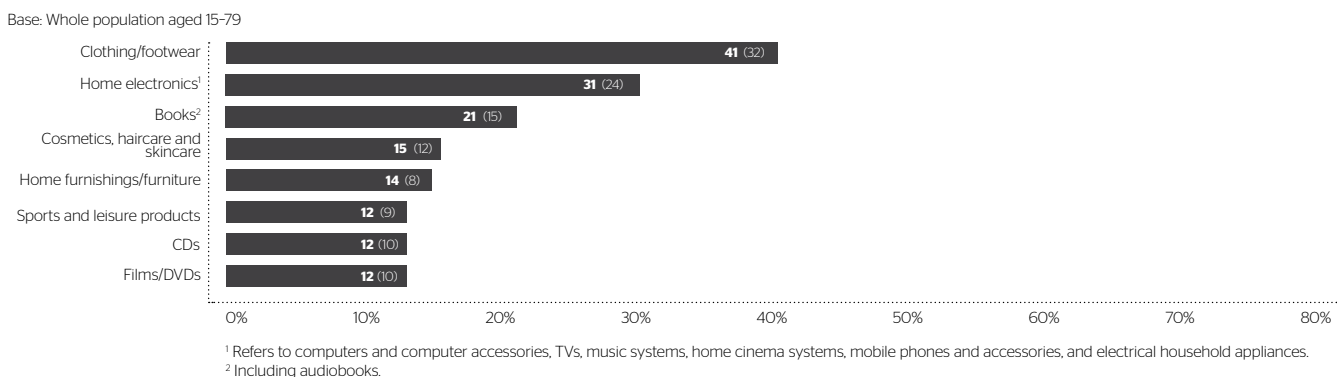
Belgium has a high level of Internet penetration and many inhabitants who shop online. Compared to other markets, however, it is not particularly common for them to shop online via a smartphone or tablet. When Belgians shop online from abroad two of their neighboring countries are at the top of their list: the Netherlands and Germany. The Netherlands is the clear favorite – a total of 35% of the population shop online from there. China is in third place and the United States is in fifth, which shows that Belgians also shop online from other continents.

## Clothing and footwear gaining ground

When Belgian consumers shop online they usually choose clothing and footwear followed by home electronics and books. When Belgians shop online from abroad, the same preferences apply. Clothing and footwear are growing the most, with an increase of 9 percentage points. Delivery cost is important to Belgians, as is the option of choosing where to have their purchases delivered.

<p><b>\$</b> <b>Inhabitants' estimated total spend on online shopping in the past year</b> (EUR billion)</p> <p><b>3.7</b></p> <p><b>🌐</b> <b>Proportion who shop online from abroad</b></p> <p><b>60%</b></p> <p>Base: Whole population aged 15-79</p>	<p><b>Top five most popular countries from which to buy products online</b></p> <p>Netherlands - 35%</p> <p>Germany - 13%</p> <p>China - 12%</p> <p>United Kingdom - 10%</p> <p>United States - 7%</p> <p>Response to the question: "From which countries have you bought products online?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most common products bought online from abroad</b></p>  <p>Response to the question: "Which types of products have you bought online from abroad in the past year?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most important factors regarding deliveries</b></p> <p>Delivery cost - 63%</p> <p>To be able to choose where your products will be delivered to - 54%</p> <p>To know the day and time of delivery at the time of purchase - 42%</p> <p>Proportion who responded: "Very important" to the question: "How important are the following delivery factors when you shop online?"</p> <p>Base: Shop online</p>
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## Which types of products have you bought online in the past year? (Belgium, %)



# Spain



Capital city	<b>Madrid</b>
Population 15-79 years old	<b>36.7 million</b>
Language(s)	<b>Spanish</b>
Currency	<b>EUR</b>
Internet penetration	<b>77%</b>
Proportion of the population who shop online*	<b>72%</b>
Proportion who have shopped online via a smartphone or tablet**	<b>43%</b>

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year.



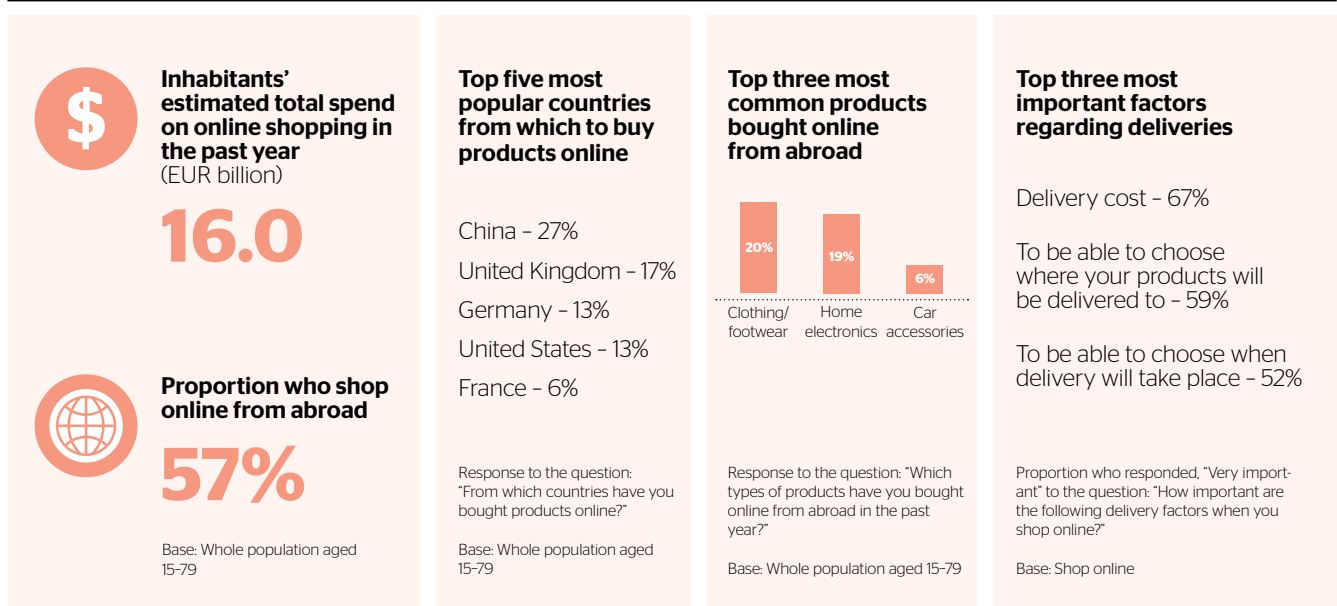
# Major step forward for shopping from abroad

## China a popular choice

Spain is characterized by a somewhat lower degree of Internet penetration, but also by the fact that a high proportion of those who have Internet access shop online. A total of 57% shop online from abroad, which is a significant increase of 7 percentage points compared to the preceding year. China is the most popular choice - nearly a third of the population have bought items online from there. The United Kingdom is in second place and Germany in third. When Spaniards shop online from abroad they mainly buy home electronics and clothing and footwear, but to a certain extent also car accessories.

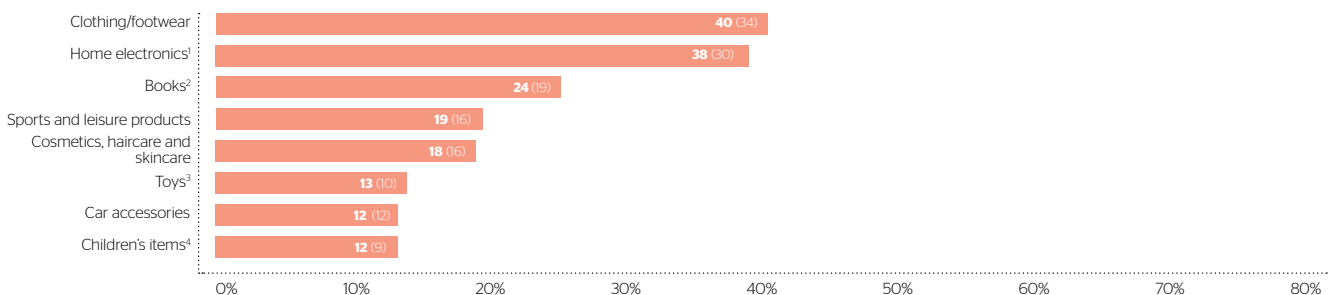
## Important to be able to choose delivery time

Overall, Spaniards' favorite product categories are clothing and footwear, home electronics and books - in that order. In particular home electronics is growing as a category compared to the preceding year, by 8 percentage points. Delivery cost is important to Spanish consumers, as is being able to choose where and when delivery will take place.



## Which types of products have you bought online in the past year? (Spain, %)

Calculated based on the answers of the respondents in each country to the question "Which types of products have you bought online in the past year?" (Base: Shop online)



<sup>1</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.

<sup>2</sup> Including audiobooks.

<sup>3</sup> Excluding computer games, computers and home electronics.

<sup>4</sup> Excluding toys, children's films, children's books and computer games for children.



## Italy



Capital city	<b>Rome</b>
Population 15-79 years old	<b>48.5 million</b>
Language(s)	<b>Italian</b>
Currency	<b>EUR</b>
Internet penetration	<b>62%</b>
Proportion of the population who shop online*	<b>58%</b>
Proportion who have shopped online via a smartphone or tablet**	<b>29%</b>

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year.

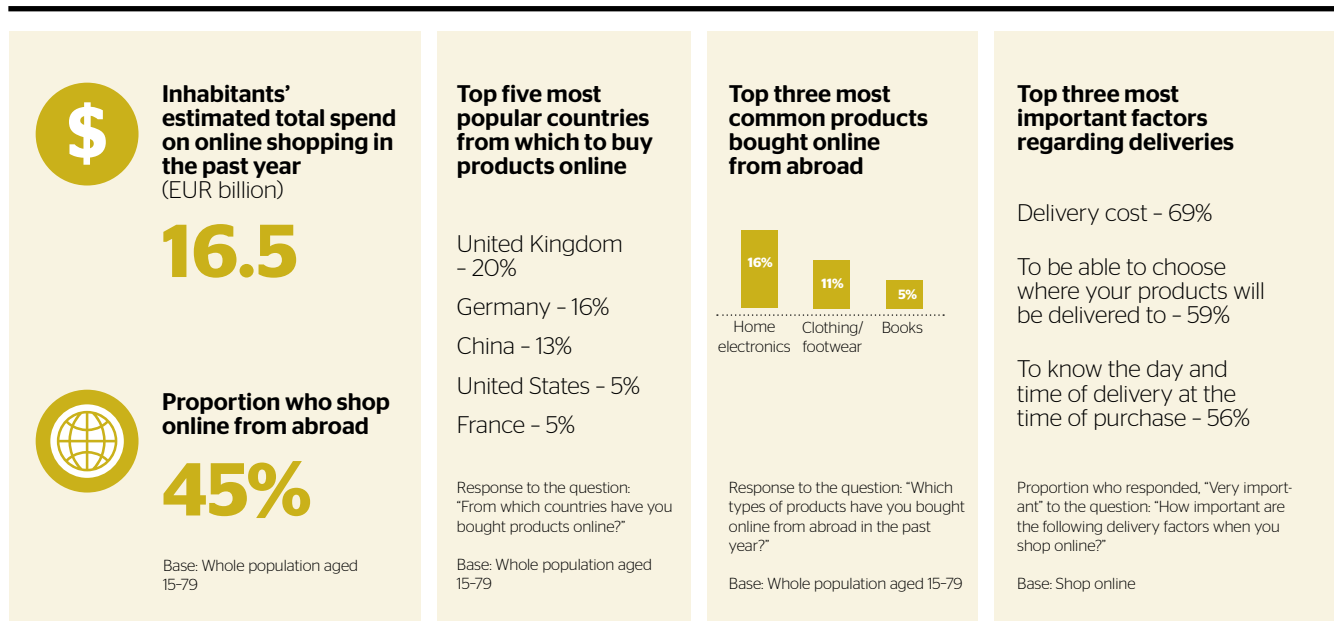
# Access to the Internet is low - but growing

## Home electronics most popular

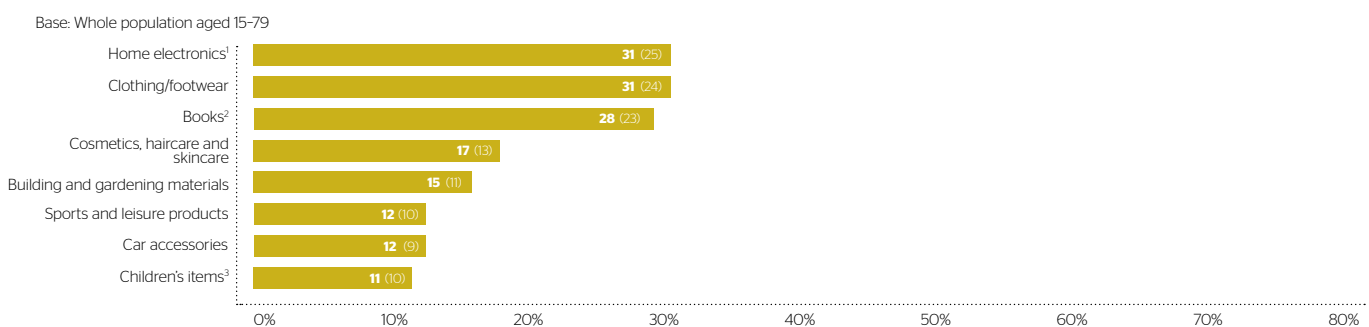
Italy has the lowest level of Internet penetration of all the countries in the survey, but a high proportion of those who have Internet access shop online. More than half of those who shop online also do so from abroad, and when they shop online from other countries they choose to buy home electronics, clothing and footwear and books. Overall, home electronics are Italians' top category of products that they most often buy online. This differentiates Italy from other markets.

## Mostly shop online within Europe

When Italians make purchases online from other countries, they primarily choose to buy from the United Kingdom and Germany. Regarding deliveries, a large proportion of Italians state that delivery cost is very important. The option of choosing where the product will be delivered to and knowing the day and time of delivery at the time of purchase are also factors that they value.



## Which types of products have you bought online in the past year? (Italy, %)



<sup>1</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.  
<sup>2</sup> Including audiobooks.  
<sup>3</sup> Excluding toys, children's films, children's books and computer games for children.



## Poland



Capital city  
Population 15-79 years old  
Language(s)  
Currency  
Internet penetration  
Proportion of the population who shop online\*  
Proportion who have shopped online via a smartphone or tablet\*\*

**Warsaw**  
**30.8 million**  
**Polish**  
**PLN**  
**68%**  
**64%**  
**27%**

\*Base: Whole population aged 15-79

\*\*Base: Whole population aged 15-79. Refers to the past year.

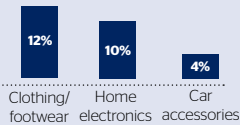
# Continued major development potential

## Substantial increase in the proportion who shop online from abroad

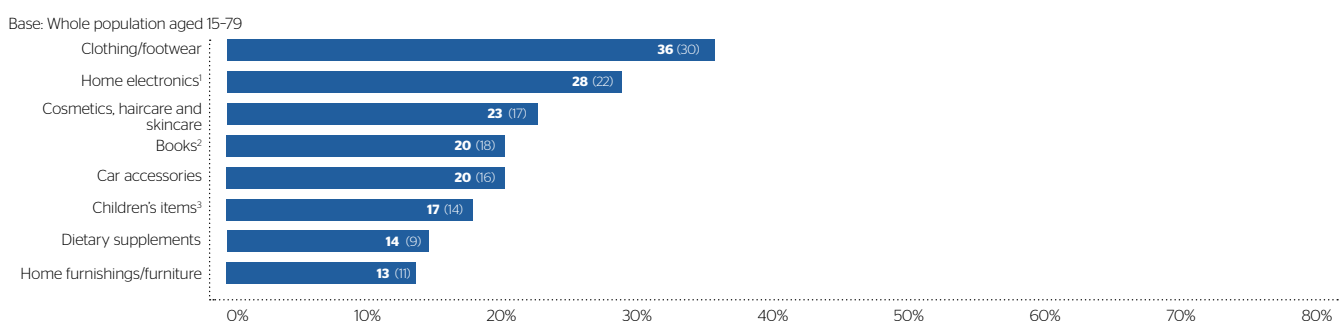
Despite an ongoing low level of Internet penetration, the proportion of people who shop online is continuing to increase in Poland. The proportion who shop online from abroad rose most of all the markets surveyed, by 12 percentage points compared to the preceding year. The increase took place from a low level, however, which is why Poland remains at the bottom of the list of how common it is to shop online from abroad compared to the other countries.

## China is overtaking the United States in online shopping from abroad

Compared to the preceding year, China is overtaking the United States as the third most common country from which Poles shop online. When shopping online from abroad, they mainly buy clothing and footwear as well as home electronics, although their third favorite product category comprises car accessories, which differs from other markets in the survey except for Spain. Online purchases of cosmetics, haircare and skincare are increasing and are this year overtaking online purchases of books. The category is thereby in the top three categories of products bought online.

<p><b>\$</b> <b>Inhabitants' estimated total spend on online shopping in the past year</b> (EUR billion)</p> <p><b>7.0</b></p> <p><b>Proportion who shop online from abroad</b></p> <p><b>36%</b></p> <p>Base: Whole population aged 15-79</p>	<p><b>Top five most popular countries from which to buy products online</b></p> <p>Germany - 11%</p> <p>United Kingdom - 10%</p> <p>China - 9%</p> <p>United States - 6%</p> <p>Netherlands - 2%</p> <p>Response to the question: "From which countries have you bought products online?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most common products bought online from abroad</b></p>  <p>Response to the question: "Which types of products have you bought online from abroad in the past year?"</p> <p>Base: Whole population aged 15-79</p>	<p><b>Top three most important factors regarding deliveries</b></p> <p>Delivery cost - 68%</p> <p>That the process is fast - 57%</p> <p>To be able to choose where your products will be delivered to - 54%</p> <p>Proportion who responded, "Very important" to the question: "How important are the following delivery factors when you shop online?"</p> <p>Base: Shop online</p>
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## Which types of products have you bought online in the past year? (Poland, %)



<sup>1</sup> Refers to computers and computer accessories, TVs, music systems, home cinema systems, mobile phones and accessories, and electrical household appliances.

<sup>2</sup> Including audiobooks.

<sup>3</sup> Excluding toys, children's films, children's books and computer games for children.

## Detailed results

### Number of people who have shopped online

The survey was conducted in the spring of 2016 by the research company Nepa. The number of respondents varies somewhat between the countries; in most countries about 1,200 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
Shop online at least once a year	96%	95%	83%	90%	90%	90%	86%	89%	89%
Shop online	96%	98%	93%	95%	93%	95%	93%	93%	94%
Shop online from abroad (Base: Shop online)	71%	65%	82%	65%	53%	74%	80%	78%	56%

#### Internet penetration

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Internet penetration	92%	88%	95%	84%	96%	85%	77%	62%	68%

Source: Internet World Stats, relates to November 2015: <http://www.internetworldstats.com/stats4.htm#europe>

#### Population

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Total, millions	64.9	81.2	26.0	66.4	16.9	11.3	46.4	60.8	38.0
Proportion aged 15-79	78%	82%	78%	76%	79%	78%	79%	80%	81%
Aged 15-79, millions	50.4	66.2	20.3	50.3	13.3	8.7	36.7	48.5	30.8

Source: Eurostat, European Union, refers to 2015:  
<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: Shop online at least once a year	87%	84%	80%	75%	86%	76%	66%	55%	60%
Base: Shop online	88%	87%	89%	80%	89%	81%	72%	58%	64%
Base: Shop online from abroad	63%	57%	73%	52%	47%	60%	57%	45%	36%
Base: Shop online, millions of people	44.5	57.6	17.9	40.2	11.9	7.1	26.4	28.0	19.6
Base: Number who shop online from abroad, millions of people	31.8	37.6	14.7	26.3	6.3	5.3	21.1	21.8	11.0

#### Average spend and turnover

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Average spend in one year, local currency (Base: Have shopped online)	965	777	.*	645	509	525	606	590	1,559
Exchange rate May 31, 2016, EUR	1.31	1	.*	1	1	1	1	1	0.23
Average spend in one year, EUR (Base: Have shopped online)	1,268	777	678	645	509	525	606	590	355
Average spend in one year, EUR (Base: Whole population aged 15-79)	1,118	676	600	516	454	426	435	341	226
Total turnover, EUR billion	56.4	44.8	12.2	26.0	6.0	3.7	16.0	16.5	7.0

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

## Product categories

Which types of products have you bought online in the past year?

(Base: Whole population aged 15-79)

### Clothing/footwear

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	60%	61%	48%	47%	49%	41%	40%	31%	36%	
Millions of consumers	27.7	35.6	9.2	20.0	6.2	3.0	11.3	9.3	7.5	129.8

### Home electronics

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	45%	40%	35%	33%	39%	31%	38%	31%	28%	
Millions of consumers	20.7	23.2	6.7	14.0	5.0	2.3	10.7	9.4	5.8	97.8

### Books

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	39%	45%	25%	33%	28%	21%	24%	28%	20%	
Millions of consumers	18.0	26.2	4.8	14.0	3.5	1.6	6.7	8.4	4.2	87.4

### Cosmetics, haircare and skincare

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	32%	31%	23%	28%	17%	15%	18%	17%	23%	
Millions of consumers	15.0	18.2	4.4	11.8	2.2	1.2	5.1	5.0	4.7	67.6

### CDs

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	25%	26%	10%	16%	12%	12%	10%	9%	9%	
Millions of consumers	11.6	15.2	2.0	6.8	1.5	0.9	3.0	2.7	2.0	45.5

### Films/DVDs

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	30%	28%	17%	14%	14%	12%	11%	9%	6%	
Millions of consumers	13.8	16.4	3.2	6.1	1.8	0.9	3.2	2.7	1.2	49.3

### Home furnishings/furniture

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	29%	24%	13%	15%	17%	14%	10%	5%	13%	
Millions of consumers	13.2	14.1	2.5	6.3	2.1	1.0	2.9	1.6	2.6	46.4

### Sports and leisure products

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	12%	26%	17%	19%	16%	12%	19%	12%	11%	
Millions of consumers	5.6	15.0	3.3	7.9	2.0	0.9	5.5	3.6	2.3	46.0

## DETAILED RESULTS

### Toys

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	25%	17%	10%	17%	13%	11%	13%	10%	9%	
Millions of consumers	11.4	10.0	1.9	7.3	1.7	0.8	3.7	3.1	1.9	41.8

### Children's items

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	22%	20%	11%	20%	13%	10%	12%	11%	17%	
Millions of consumers	10.2	11.4	2.0	8.4	1.7	0.7	3.4	3.4	3.5	44.8

### Food

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	32%	13%	9%	17%	8%	6%	12%	9%	8%	
Millions of consumers	14.8	7.5	1.7	7.1	1.0	0.4	3.3	2.8	1.7	40.4

### Car accessories

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	21%	19%	10%	13%	9%	7%	12%	12%	20%	
Millions of consumers	9.5	11.0	2.0	5.6	1.1	0.5	3.5	3.5	4.1	40.7

## Favorite 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	Home electronics	Home electronics	Home electronics	Home electronics	Home electronics	Home electronics	Home electronics	Clothing/ footwear	Home electronics
Third place	Cosmetics, haircare and skincare	Sport/leisure products	Cosmetics, haircare and skincare	Children's items	Cosmetics, haircare and skincare	Books	Car accessories	Books	Car accessories

## How important is the lowest price?

### Proportion of online shoppers who rate lowest price as a very important criterion if they are to buy from a website.

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	43%	34%	40%	42%	42%	47%	49%	54%	43%



## Which payment method is preferred?

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

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Debit card or credit card	47%	18%	35%	51%	24%	50%	37%	31%	16%
Invoice in arrears	2%	27%	21%	3%	13%	6%	2%	2%	4%
Direct payment through my bank	5%	15%	18%	5%	25%	18%	5%	7%	33%
PayPal or similar	41%	34%	19%	37%	31%	20%	42%	47%	24%
Cash on delivery	4%	3%	3%	3%	4%	4%	13%	12%	22%
Payment by installments	1%	2%	3%	1%	3%	1%	1%	1%	1%
Don't know	0%	0%	1%	1%	1%	1%	0%	0%	0%

## How important is fast delivery?

### Proportion who think that it is very important to have a fast delivery (max. three days) if they are to buy from a website.

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	41%	39%	25%	41%	46%	41%	42%	43%	56%

## How long a delivery time is acceptable?

### When you order a product online, what are your expectations of the delivery time, i.e., what is the maximum number of days it should take for you to receive the product?

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
1-2 days	16%	15%	7%	15%	37%	25%	17%	12%	22%
3-5 days	71%	74%	61%	68%	52%	57%	57%	71%	68%
6 days or more	10%	9%	24%	14%	9%	16%	22%	15%	9%
Don't know	3%	2%	7%	3%	3%	3%	4%	2%	2%

## How do you prefer to have your product delivered?

### When you order a product online, how do you prefer to have it delivered?

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
In your mail box by the mail carrier	19%	35%	34%	34%	25%	23%	20%	14%	12%
Collect it yourself from a partner outlet or service point	7%	3%	28%	25%	10%	16%	7%	6%	8%
To your home in daytime	41%	31%	10%	22%	36%	30%	31%	51%	33%
To your home in the evening	18%	16%	7%	8%	22%	17%	25%	12%	17%
To your workplace	5%	4%	1%	3%	2%	3%	6%	8%	7%
Collect it yourself in a physical store	7%	5%	9%	4%	4%	7%	9%	7%	6%
Collect it yourself from a parcel machine (parcel box)	2%	6%	9%	3%	1%	3%	1%	2%	16%
Other, not sure, don't know	1%	0%	1%	1%	1%	1%	1%	1%	1%

Are you willing to pay for faster delivery (the next day)?

**Proportion who responded yes.**

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	42%	27%	18%	20%	17%	15%	32%	30%	44%

Is it important to you to be able to change the delivery date or time after the products have been dispatched from the online store?

**Proportion who responded yes.**

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	43%	31%	13%	45%	51%	25%	60%	52%	69%

How important are trouble-free returns?

**The proportion who think that it is very important to have clear procedures for returns if they are to buy from a website.**

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	52%	50%	47%	57%	50%	55%	57%	65%	57%

Proportion of the population who have returned an online purchase in the past year

(Entire population aged 15-79)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	41%	46%	28%	32%	39%	26%	22%	19%	17%

Do you assume that it is possible to return an item bought online?

**Proportion who responded yes.**

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	93%	93%	91%	88%	93%	89%	85%	79%	98%

Do you think in general that it is easy to understand the procedures for returns on the websites of online stores?

**Proportion who responded yes.**

(Base: Shop online)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	75%	66%	56%	51%	70%	66%	61%	55%	71%

## Returns by product category

## Which types 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
%	23%	28%	15%	17%	21%	13%	9%	9%	9%	
Millions of consumers	10.6	16.6	0.8	7.1	2.7	1.0	2.6	2.6	1.9	45.8

## Home electronics

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	8%	7%	4%	6%	6%	4%	7%	5%	4%	
Millions of consumers	3.5	4.2	0.2	2.4	0.7	0.3	2.0	1.4	0.8	15.6

## Home furnishings/furniture

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	4%	2%	1%	1%	1%	1%	1%	1%	1%	
Millions of consumers	1.6	1.1	0.1	0.5	0.2	0.1	0.3	0.2	0.2	4.2

## Books

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	2%	2%	1%	2%	2%	1%	1%	1%	1%	
Millions of consumers	1.1	1.3	0.1	0.9	0.2	0.0	0.3	0.3	0.2	4.3

## Children's items

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	4%	3%	1%	2%	2%	1%	1%	1%	2%	
Millions of consumers	1.7	1.5	0.1	1.0	0.2	0.1	0.3	0.4	0.3	5.3

## Sport/leisure products

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	1%	4%	1%	2%	1%	0%	1%	1%	1%	
Millions of consumers	0.6	2.1	0.1	0.6	0.2	0.0	0.4	0.2	0.1	4.3

## Car accessories

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	2%	3%	1%	2%	1%	1%	1%	1%	2%	
Millions of consumers	1.1	1.5	0.0	0.7	0.1	0.0	0.3	0.3	0.3	4.3

## Films/DVDs

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland	Total
%	3%	2%	1%	1%	1%	1%	1%	0%	1%	
Millions of consumers	1.3	0.9	0.1	0.4	0.1	0.1	0.2	0.1	0.1	3.3

## Proportion who have shopped online via a smartphone or tablet in the past year

(Base: Whole population aged 15-79)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
%	59%	44%	39%	33%	40%	27%	43%	29%	27%

## Reasons for shopping online from a specific country

### Why have you shopped online from your chosen countries?

(Base: Shop online from abroad)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
I'm looking for a wide range of products	11%	15%	16%	11%	14%	19%	16%	16%	22%
I'm looking for a specific brand	20%	12%	16%	16%	16%	12%	14%	17%	18%
The prices are generally lower	33%	26%	32%	35%	37%	33%	31%	32%	25%
The country is reliable regarding terms and conditions of purchase, payments and deliveries	7%	7%	8%	8%	6%	10%	12%	12%	7%
I was curious	6%	14%	8%	5%	8%	4%	9%	5%	12%
I find products there that I can't find elsewhere	24%	27%	21%	24%	19%	21%	17%	17%	15%

## 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%	15%*	1%	1%	1%	1%	1%	1%
Denmark	1%	1%	5%*	1%	0%	0%	1%	1%	0%
Norway	2%	1%	3%*	0%	1%	0%	1%	1%	1%
Finland	1%	0%	1%*	0%	0%	0%	1%	0%	0%
Iceland	1%	0%	0%	0%	0%	0%	0%	0%	0%
United Kingdom	-	15%	24%	18%	11%	10%	17%	20%	10%
Germany	11%	-	17%	13%	13%	13%	13%	16%	11%
The Netherlands	3%	5%	3%	2%	-	35%	2%	2%	2%
France	5%	4%	3%	-	2%	7%	6%	5%	1%
Spain	4%	3%	2%	3%	1%	2%	-	4%	1%
Italy	3%	2%	2%	3%	1%	1%	4%	-	1%
Russia	1%	1%	1%	0%	0%	0%	0%	1%	0%
Rest of Europe	5%	4%	4%	2%	3%	2%	2%	2%	1%
USA	27%	13%	21%	11%	9%	7%	13%	5%	6%
Canada	3%	1%	1%	1%	1%	0%	1%	0%	1%
Rest of North and Central America	1%	0%	1%	0%	0%	0%	0%	0%	0%
China	27%	17%	19%	15%	19%	12%	27%	13%	9%
India	2%	0%	0%	0%	0%	0%	1%	1%	0%
Japan	6%	3%	2%	3%	2%	2%	4%	2%	1%
Rest of Asia	3%	1%	4%	1%	1%	1%	2%	1%	1%
Australia	2%	1%	1%	0%	0%	0%	0%	0%	0%
Countries in South America	0%	0%	0%	0%	0%	0%	0%	0%	0%
Countries in Africa	1%	0%	0%	0%	0%	0%	0%	0%	0%

\* Weighted average excluding the country in question.

## Number of consumers who have shopped online from various countries

(Millions of consumers aged 15-79)

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
Sweden	0.7	0.4	2.2*	0.4	0.1	0.1	0.3	0.2	0.3
Denmark	0.6	0.7	1.1*	0.2	0.1	0.0	0.2	0.2	0.1
Norway	0.7	0.4	0.3*	0.1	0.1	0.0	0.2	0.2	0.2
Finland	0.4	0.2	0.2*	0.1	0.0	0.0	0.2	0.1	0.1
Iceland	0.5	0.2	0.1	0.2	0.1	0.0	0.1	0.1	0.1
UK	-	8.8	4.6	7.5	1.5	0.7	4.8	6.0	2.1
Germany	5.0	-	3.4	5.3	1.6	1.0	3.7	4.9	2.4
The Netherlands	1.2	2.8	0.6	0.9	-	2.6	0.5	0.5	0.3
France	2.2	2.5	0.5	-	0.2	0.5	1.7	1.6	0.2
Spain	1.7	1.5	0.3	1.4	0.1	0.1	-	1.2	0.2
Italy	1.5	1.4	0.3	1.3	0.1	0.0	1.2	-	0.2
Russia	0.3	0.5	0.1	0.2	0.1	0.0	0.1	0.2	0.0
Rest of Europe	2.4	2.2	0.8	0.8	0.4	0.1	0.7	0.6	0.3
USA	12.3	7.4	4.1	4.5	1.1	0.5	3.6	1.6	1.2
Canada	1.3	0.5	0.2	0.5	0.1	0.0	0.2	0.1	0.1
Rest of North and Central America	0.6	0.2	0.1	0.1	0.1	0.0	0.1	0.0	0.0
China	12.6	9.9	3.6	6.5	2.4	0.9	7.6	3.9	1.9
India	0.9	0.2	0.1	0.2	0.0	0.0	0.3	0.2	0.0
Japan	2.6	2.0	0.5	1.2	0.2	0.1	1.1	0.7	0.2
Rest of Asia	1.4	0.8	0.8	0.5	0.2	0.1	0.5	0.2	0.2
Australia	1.0	0.3	0.2	0.1	0.0	0.0	0.1	0.1	0.1
Countries in South America	0.2	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Countries in Africa	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0

\* Excluding the inhabitants in the country in question.

## Favorite countries

### Preferred countries from which to shop online

	UK	Germany	Nordics	France	Netherl.	Belgium	Spain	Italy	Poland
First place	USA	China	UK	UK	China	Netherl.	China	UK	Germany
Second place	China	UK	USA	China	Germany	Germany	UK	Germany	UK
Third place	Germany	USA	China	Germany	UK	China	Germany	China	China
Fourth place	Japan	Netherl.	Germany	USA	USA	UK	USA	USA/France	USA
Fifth place	France	France	Sweden*	Spain	Japan	USA	France	USA/France	Netherl.

\* Weighted average for Denmark, Finland and Norway (i.e., excluding Sweden).

## PostNord – a partner for e-commerce

PostNord provides distribution solutions 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 the biggest and obvious partner for e-commerce in the Nordic market. We offer communications and logistics solutions to, from and within the Nordic region. In 2015 we had 35,000 employees and net sales of around SEK 40 billion. 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 6,000 distribution points, spread out evenly across Denmark, Finland, Norway and Sweden.

In Sweden and Denmark, our mail carriers visit all households and companies every working day. PostNord offers services in the field of third-party logistics with a high level of 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](http://www.postnord.com) and [www.directlink.com](http://www.directlink.com)

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