Digital marketplaces gain increasing influence
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About this report

PostNord has studied the European e-commerce market in the E-commerce report since 2014. The report is based on interviews with a total of about 11,000 consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK. When the report refers to Europe, it is referring to these countries unless stated otherwise. The interviews were conducted with representative nationwide samples of private individuals aged 15-79 years. The number of respondents varies somewhat between the countries. In most of them, the number of respondents was around 1,000. The Nordics are an exception, where the countries are reported as one cohesive region and the number of respondents was just over 500 per country. The interviews were conducted by the research company Nepa.

Since the survey was conducted online, the responses were recalculated based on the percentage of the population in each country that used the Internet in 2018. This percentage was calculated by Eurostat. This is of significance, since Internet use varies among the different European countries.

To calculate how many consumers from each market shop online, we used Eurostat’s population statistics for 2018 as a basis.

To calculate the average purchase in EUR we used the exchange rate from May 28, 2019.

The report presents the aggregate findings for the Nordic region. The Nordic region refers to Sweden, Denmark, Norway and Finland. However, the smallest country in the region, Iceland, is not included in the survey, unless stated otherwise.

E-commerce is defined as the purchase of physical products via the Internet. This means that services (e.g. travel, hotel and tickets), as well as downloads (e.g. music, movies and apps), are not included.

PostNord also publishes the E-barometer report in Sweden and 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.

“Climate and environment will be the next major issues in the industry”

PostNord has been producing the E-commerce in Europe report since 2014. Over the years we have been able to see how e-commerce has developed in a number of areas, ranging from consumer demand for deliveries and returns, to how e-commerce moved into the cell phone. But if we look forward, I believe that climate and the environment will be the next major issues for the industry. For example, clearly, more and more people are beginning to question the sustainability of sending parcels back and forth over long distances, which is especially common in segments with high return rates, such as fashion.

PostNord has an important role to play. Our carbon dioxide emissions mainly come from transports and as e-commerce increases, we handle more and more parcels. The target is a 40 percent reduction in our total carbon dioxide emissions by 2020, in relation to 2009, mainly through reduced use of fossil fuel. This is a challenge, but we are making progress. By the end of 2018, carbon dioxide emissions had decreased by 35 percent compared with 2009, so we have good prospects of reaching the target.

But we also want to help make e-commerce more climate-smart in the area in which we are experts—logistics. We at PostNord are therefore gathering various companies and organisations in a work stream to develop new processes and methods for more sustainable transports in e-commerce. There is much to be done here. For example, the choice of packaging material and the size of the packaging can be optimized to allow more parcels to fit in a single transport. I look forward to being able to present more details about this in the future.

Another point that we have followed up in the report addresses how e-commerce is becoming increasingly global. This is well in line with our experiences here at PostNord. A growing number of companies are coming to us because they want to enter Europe, and more and more e-retailers that are already here are taking the step beyond the borders of their own countries.

We at PostNord want to be the obvious partner for e-commerce, to and from within the Nordic region. As an e-retailer, you are therefore welcome to contact us at any time about everything from local market information to distribution solutions. Through our global logistics company Direct Link we help e-retailers worldwide establish a presence in new markets.

I hope that this report will give you a great deal of useful new information and insights about the European e-commerce market, whether you already have a business in Europe or are thinking about establishing operations here.

Annemarie Gardshol,
Acting Group CEO PostNord

“A growing number of companies are coming to us because they want to enter Europe, and more and more e-retailers that are already here are taking the step beyond the borders of their own countries.”
European e-commerce market

Percentages and values refer to the entire population aged 15 to 79 years.

Question: Approximately how often do you buy goods online? Comprises all respondents minus those who responded “Never,” “Unsure,” or “Don’t know.” All methods have been used in previous reports with the exception of the calculation of internet penetration.

Overview

In most countries, both the number of people who shop online and the amount they spend have increased since 2014.

The EU initiatives to increase access to the internet, expand broadband infrastructure and eliminate roaming fees within the union provide an important partial explanation. Another reason is that people without an internet connection in the home can now use their cell phones to go online.

European countries are clearly becoming more equal regarding digitalization, and are moving toward a common e-commerce market. The number of European online shoppers is extremely likely to increase and buying behavior online will be broadened, with more types of goods available and more frequent purchases.

1 The source for internet penetration changed this year from Internet World Stats to Eurostat.
E-commerce in Europe 2019

In recent years, more groups have begun to shop online, and the largest increase has occurred among older individuals.

One reason is that digitally mature groups are aging, another is that those who are already 65 are learning to shop online. Older people also benefit from the increase in choices for accessing the Internet compared with previously—those who have difficulty using a computer can use a cell phone or tablet instead. And it will be even simpler in the future. Voice-recognition tools such as Alexa and Google Home in the US have already been shown to be capable of helping older people in everyday life, since they require less technical knowledge. Voice recognition is expected to be particularly valuable for older people with physical disabilities.

Between 2015 and 2019, the percentage of older Europeans who shopped online has sharply increased. In 2015, 24 percent of shoppers made a return. In 2019, the corresponding figure was 43 percent. One reason is that online stores have improved their return processes and their explanations of the terms and conditions that apply. As a result, consumers feel more confident that everything will work and dare to order more products and then return what they do not want.

Growing marketplaces
Marketplaces were not investigated in 2014 because they were not as large a phenomenon here in the Nordic countries at that time. However, in recent years marketplaces have become increasingly important. The advantage is that most are in a single place. However, players are also emerging who only sell a certain kind of product. For example, Zalando has developed into a marketplace dedicated to fashion.

Free is no longer sustainable
A growing number of e-retailers appear to be considering whether free shipping and returns are sustainable, from both an environmental and a financial perspective. For example, Zalando, which previously promoted free shipping as its major message, has begun to charge for orders under a certain amount.

Eight trends spotted from five years of e-commerce

Arne Andersson, e-commerce expert at PostNord, and Olof Källgren, Market Information Manager at Direct Link, summarize the development of e-commerce since E-commerce in Europe was first published in 2014.

E-commerce is becoming increasingly global
Cross-border e-commerce is increasing every year. In 2014, four of 10 e-commerce consumers stated that they had shopped online from abroad. In this year’s report the figure is 75 of ten. E-commerce from China has grown most, driven primarily by the low prices. E-commerce from the UK and Germany have also increased, but here consumers are driven more by strong brands and unique products.

E-commerce using the cell phone is growing
E-commerce using the cell phone has also undergone strong growth. In 2014, 28 percent of e-commerce consumers had shopped using their cell phone while this year the figure is an impressive 63 percent. One reason is that cell phone usage has increased in countries that have lagged in digital development, providing more people with convenient Internet access. Another reason is that the cell phone is always available, making online shopping possible anytime, anywhere.

Returns have increased
The return rate was not explored in 2014, but in 2015 24 percent of shoppers made a return. In 2019, the corresponding figure was 43 percent. One reason is that online stores have improved their return processes and their explanations of the terms and conditions that apply. As a result, consumers feel more confident that everything will work and dare to order more products and then return what they do not want.

New product categories
Clothing and footwear, home electronics, and books have been the most popular product categories to purchase online ever since the report was first published in 2014. But a few newcomers have arrived that we believe will increase greatly in the future, including home furnishings, and products in the beauty and health segment.

Higher demands for freedom of choice
Consumer requirements for freedom of choice regarding delivery has steadily increased, and e-retailers have listened. In-store pickup in chain stores is becoming increasingly popular. Partner outlets have made strong progress in countries that have otherwise preferred home delivery. In the Nordic region, where partner outlets are standard, home delivery has instead increased.

The internet changes the purchase journey
The internet has developed at record speed which has had great significance for how e-retailers reach consumers and how the purchase experience is designed. We are primarily thinking about influencers through whom e-retailers can market themselves, and

Outlook

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E-commerce in Europe 2019

**45 million new consumers shopped online**

Digitalization has taken Europe by storm. Eurostat statistics show growth in essentially all digital areas, from video streaming and social media to banking and of course - e-commerce. In four years, 45 million new e-commerce consumers have been added in the surveyed countries, and today the total number is 286 million.

However, not only domestic e-commerce has grown. The number of consumers that make online purchases from abroad has exploded in Europe over the past four years, from 159 to 217 million people - an increase of 58 million. Considering the EU initiatives to achieve a common European e-commerce market, and to eliminate obstacles to trade, it is likely that the increase will continue, and that borders between countries within the union will have declining significance for e-commerce.

**Total e-commerce** in the surveyed countries is EUR 235 billion annually. Germany was still the largest e-commerce market, closely followed by the UK. But the southern European markets have seen strong growth and are taking an ever-increasing share of e-commerce’s total cake.

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**286 million consumers in Europe shop online**

**235 billion EUR** - the total that European consumers estimate that they spent online in the past year

**217 million European consumers** make online purchases from abroad

Did you know that...

Italy and Spain are among the countries where e-commerce has developed most rapidly in recent years.

How much do you estimate you have spent online in the past year?

Number of EUR billion that European consumers have spent online over the past year

<table>
<thead>
<tr>
<th>Country</th>
<th>EUR Billion</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>47.1</td>
</tr>
<tr>
<td>ITALY</td>
<td>32.2</td>
</tr>
<tr>
<td>FRANCE</td>
<td>37.9</td>
</tr>
<tr>
<td>SPAIN</td>
<td>24.5</td>
</tr>
<tr>
<td>POLAND</td>
<td>12.8</td>
</tr>
<tr>
<td>BELGIUM</td>
<td>4.2</td>
</tr>
<tr>
<td>GERMANY</td>
<td>52.1</td>
</tr>
<tr>
<td>NETHERLANDS</td>
<td>8.2</td>
</tr>
<tr>
<td>NORDIC REGION</td>
<td>16.9</td>
</tr>
</tbody>
</table>
Low prices attract shoppers from abroad

There are many reasons to shop online from abroad. The most common are wide range of products, unique products, lower prices, or quite simply, curiosity. Germans are particularly curious, with almost one quarter of all purchases abroad based on pure curiosity, primarily from China, the US and the UK.

But the strongest driving force is low prices. The reason is that the major brands are global and many products are standardized, which allows price comparisons, if the price level differs between countries it is easy to shop where the lowest price is found. Nor do delivery times pose an obstacle, since they are usually short in Europe, including across national borders.

Low prices appear to be important regardless of how developed e-commerce is in a country. In both the well-developed UK and fast-growing Poland, low prices are essentially equally important.

However, the situation for product selection is different. In large countries with well-developed e-commerce, such as Germany, France and the UK, a large selection does not rate particularly high - it is quite simply taken for granted. In contrast, a large selection rates high in Sweden, Norway, Poland and Italy. Even though e-commerce is well developed in Sweden and Norway, the countries are small, for which reason the selection is perceived as small. Meanwhile, Italy and Poland are large markets, but here e-commerce has not come as far as in Germany, France and the UK, which also limits the range of products.

How common is shopping online from abroad?

Question: Approximately how often do you buy products online from abroad? Basis: Have shopped online from abroad.

Number of consumers in millions who have shopped online in each category over the past year.

For more detailed information, see detailed results on pages 47-48.
International retailing

217 million people have shopped online from abroad

Number of consumers in millions in each country who shopped online from abroad

Basis: Entire population, aged 15–79 years

Young people shop from abroad more often

Young consumers are often at the forefront of new trends, and e-commerce from abroad is no exception. In many of the countries more than one in four young consumers state that they make online purchases from abroad at least once a month. The largest increase in recent years has occurred in Poland.

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of consumers who shopped online from abroad</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>6.0</td>
</tr>
<tr>
<td>Netherlands</td>
<td>9.0</td>
</tr>
<tr>
<td>Italy</td>
<td>31.6</td>
</tr>
<tr>
<td>Poland</td>
<td>16.7</td>
</tr>
<tr>
<td>Spain</td>
<td>25.5</td>
</tr>
<tr>
<td>Germany</td>
<td>44.1</td>
</tr>
<tr>
<td>France</td>
<td>33.7</td>
</tr>
<tr>
<td>UK</td>
<td>33.3</td>
</tr>
</tbody>
</table>

E-commerce in Europe 2019

[Image of a diagram showing the percentage of the 18-29 age group that make online purchases from abroad at least once a month. The difference in percentage points between 2015 and 2019 is shown in parentheses.]

Percentage of the 18-29 age group that make online purchases from abroad at least once a month

The difference in percentage points between 2015 and 2019 is shown in parentheses. Percentage who shopped online from abroad each month in 2015 - Increase 2015-2019

- UK: 18% (+4)
- Belgium: 16% (+4)
- Denmark: 15% (unchanged)
- Spain: 25% (unchanged)
- Sweden: 25% (unchanged)
- Poland: 21% (+4)
- Norway: 18% (+4)
- Italy: 22% (unchanged)
- Netherlands: 27% (unchanged)
- France: 38% (+5)
- Finland: 10% (+4)
- Germany: 33% (+13)
China, the UK and the US top the list for online shopping abroad

China is most popular when Europeans make online purchases from abroad. Companies such as AliExpress and Wish mainly attract with inexpensive products, while the UK, Germany and the US are more appealing with respect to brands, good service and unique products.

E-commerce using the cell phone is skyrocketing

Today, using mobile devices for shopping is a given. In five years, the percentage of European consumers who used a cell phone or tablet to shop online has almost tripled. On average, almost two of three Europeans has shopped using a mobile device during the past year.

A mobile-friendly page has therefore become a hygiene factor for online stores, and consumer demands are constantly increasing. Now, consumers also expect websites that load quickly and are easy to search, make accurate personal recommendations, and the option to pay without having to fill in a bunch of personal information or to register an account.

Since it is easy to switch to a different online store that sells the same product, any resistance in the purchase journey may mean a lost customer, so it is important for e-retailers to keep up with developments.
International marketplaces in Europe

The latest e-commerce trend involves digital marketplaces, a kind of digital bazaar where external salespeople compete with each other for customers. The gist is a huge offering, stiff competition and low prices, which many traditional shoppers find hard to resist.

International marketplaces are common in large countries, and less common in small countries. The explanation is Amazon, which has deliberately focused on the largest markets in Europe.

Access to international marketplaces will probably increase in the smaller countries over the next few years. Most likely, the major market participants will expand, or less likely, a domestic participant will succeed in positioning itself before the giants barge in.

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage who shopped online from marketplaces in the past year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>56%</td>
</tr>
<tr>
<td>Finland</td>
<td>63%</td>
</tr>
<tr>
<td>Belgium</td>
<td>63%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>64%</td>
</tr>
<tr>
<td>Sweden</td>
<td>65%</td>
</tr>
<tr>
<td>Norway</td>
<td>74%</td>
</tr>
<tr>
<td>France</td>
<td>92%</td>
</tr>
<tr>
<td>Poland</td>
<td>93%</td>
</tr>
<tr>
<td>Germany</td>
<td>93%</td>
</tr>
<tr>
<td>Spain</td>
<td>94%</td>
</tr>
<tr>
<td>UK</td>
<td>97%</td>
</tr>
<tr>
<td>Italy</td>
<td>98%</td>
</tr>
</tbody>
</table>

The term “marketplaces” refers to Amazon, Wish, eBay, Zalando, Etzy, Alibaba, JD, or Allegro.

Basis: Have shopped online.
Amazon and Wish have different strategies in Europe

The international marketplaces appear to have different strategies in Europe. This is clarified by a comparison between Amazon, based in the US, and Wish, based in China. Amazon is strong in a few markets, while Wish has small market shares in many countries. The diagram below shows loyalty to Amazon is extremely high in the countries where the company is established (with the exception of Poland). The UK, Germany, Spain, France and Italy are examples of this phenomenon. In contrast, customers in neighboring countries do not appear to be particularly inclined to shop from Amazon – the giant loses its grip on customers as soon as the product has to cross a border. This means that Amazon has a few strong footholds in Europe, but without much reach.

In contrast, Wish appears to pursue the reverse strategy. Wish is relatively popular in most countries, but does not have a strong position in any country. Norwegians and Swedes shop most from Wish.

International marketplaces drive purchasing frequency

A clear effect of the invasion by marketplaces is the increase in consumer purchasing frequency. In countries where more people shop online from marketplaces, more people also shop online every week. This trend is probably because it is convenient to shop in marketplaces, at the same time that they also often have attractive member benefits. A well-known membership service is Amazon Prime, which provides access to Amazon’s streaming service, discount coupons, and most importantly: free shipping. Prime members can shop with free shipping at any time and this drives sales sharply upwards. Prime customers have been shown to shop for more than twice as much as ordinary Amazon customers and the difference appears to increase with each year.
Two things affect how quickly consumers in a country expect to receive their goods purchased online: population density and the maturity of the e-commerce market. Residents of densely populated Belgium and the Netherlands have become used to quick deliveries. The highest expectations can be found in the Netherlands, where more than one in three consumers expects to receive the purchased product within two days.

Speed and freedom of choice are currently hygiene factors in all markets. But it is interesting to note that consumers in rapidly growing new markets, such as Italy and Spain, say that fast and flexible deliveries are very important, while consumers in more mature markets, such as the UK, Germany and the Nordic region, do not rank this as high. This may be because consumers in mature markets quite simply take speed and flexibility for granted.

The markets are on the way to finding the balance between consumer expectations and the ability of companies to deliver. However, it is still possible to exceed customer expectations regarding delivery.

When you buy a product online, what are your expectations as to delivery time? What is the maximum number of days it may take to have your product delivered?

Did you know that...

Over the past five years, consumers in fast-growing e-commerce markets such as Belgium, Italy and Spain have begun to expect faster deliveries, while only marginal changes have been seen in mature markets such as the UK, Germany and the Nordic region.

Mature markets take fast and flexible deliveries for granted

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

**Delivery expectations in different countries**

Respondents who answered “don’t know” have not been included.

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Poland</th>
<th>Netherlands</th>
<th>UK</th>
<th>Germany</th>
<th>Italy</th>
<th>Spain</th>
<th>Belgium</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home delivery in daytime</td>
<td>63%</td>
<td>46%</td>
<td>51%</td>
<td>68%</td>
<td>43%</td>
<td>37%</td>
<td>42%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>Delivered to my mailbox/multi-occupancy mailbox by the mail carrier</td>
<td>14%</td>
<td>20%</td>
<td>19%</td>
<td>11%</td>
<td>6%</td>
<td>16%</td>
<td>37%</td>
<td>44%</td>
<td>38%</td>
</tr>
<tr>
<td>Collect the product myself from a distribution point</td>
<td>4%</td>
<td>13%</td>
<td>11%</td>
<td>4%</td>
<td>7%</td>
<td>8%</td>
<td>2%</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Home delivery in evening</td>
<td>11%</td>
<td>13%</td>
<td>17%</td>
<td>7%</td>
<td>8%</td>
<td>25%</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Collect the product myself from a parcel machine</td>
<td>1%</td>
<td>3%</td>
<td>0%</td>
<td>2%</td>
<td>29%</td>
<td>2%</td>
<td>4%</td>
<td>1%</td>
<td>10%</td>
</tr>
<tr>
<td>Delivery to workplace</td>
<td>5%</td>
<td>4%</td>
<td>1%</td>
<td>7%</td>
<td>5%</td>
<td>9%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Pick up at the online store’s physical store</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Deliveries

How important are the following factors regarding delivery in your decision to buy goods from an online store?

- Fast delivery
- Option to choose the place for delivery
- Option to choose when delivery will occur

Basis: Have shopped online.

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

Basis: Have shopped online.

How important are the following factors regarding delivery in your decision to buy goods from an online store?

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

Basis: Have shopped online.

Option to change time of delivery

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- Option to choose when delivery will occur
- Option to choose the place for delivery

Basis: Have shopped online.

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

Basis: Have shopped online.

Option to change time of delivery

Basis: Have shopped online.

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

Basis: Have shopped online.

How important are the following factors regarding delivery in your decision to buy goods from an online store?

- Fast delivery
- Option to choose when delivery will occur
- Option to choose the place for delivery

Basis: Have shopped online.

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

Basis: Have shopped online.

Option to change time of delivery

Basis: Have shopped online.

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- Option to choose the place for delivery

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Option to change time of delivery

Basis: Have shopped online.

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

Basis: Have shopped online.

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- Fast delivery
- Option to choose when delivery will occur
- Option to choose the place for delivery

Basis: Have shopped online.

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

Basis: Have shopped online.

Option to change time of delivery

Basis: Have shopped online.

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

Basis: Have shopped online.
Returns – a double-edged sword

The pendulum has swung. Returns have gone from being honored as the holy grail of e-commerce for creating loyalty and recruiting new customers, to being questioned from a financial and environmental perspective. There are many examples. Zalando has begun to charge for returns, and H&M describes how AI will help consumers find the right size and fit for clothing. This approach will reduce both returns and margins and lower environmental impact. But free returns are still a basic requirement for many consumers. The exception is when the store has a strong brand or sells unique products. The fashion industry has the most returns, but the retail sector as a whole has a return rate of about 10 percent in physical stores and about the double in e-commerce.

Consumers also have high demands for information about how the return process works, and in recent years online stores appear to have fought hard to clarify terms and conditions and to simplify the practical side of returns. In all countries, with the exception of the UK, consumers think it is easier to understand procedures today than they stated in 2016. This trend is probably related to improvement efforts at online stores, but consumers have also become more used to returning goods and do so more often.

Clear returns – a business-critical factor

• How important is it that “Clear instructions are given for how to return goods” in your decision to buy goods from an online store?
• In general, do you think that it is easy to understand the procedures for returns on the websites of online stores?

More payment solutions result in better business

In many ways, e-commerce in the European countries is becoming more standardized, but there are major differences regarding payment methods. Online stores need to understand their local market and know how consumers want to pay. Those who offer many alternatives are most successful. In the UK, France, Spain and Italy, consumers prefer credit cards, PayPal, or similar services. Greater variation can be found in other countries, in many, local options have a strong position. In the Netherlands and Poland direct payment to the bank is common. Poland is also the only country in Europe where cash on delivery is relatively common. The Nordic region and Germany rely to a large degree on payment by invoice. That has been the case since the e-commerce was in its infancy, and it will probably continue. Especially considering that today invoice apps are available that can track invoice payments, where, for example, it is possible to freeze the payment if the product is to be returned. In addition, invoice purchases mean that consumers do not have to pay any money if they make a return.

Alternative payment methods (APMs) are becoming more popular with strong growth expected over the next few years. PayPal is perhaps the most common example but there are hundreds of new alternative payment methods all over the world. In the developed countries, for example, Apple Pay, Google Pay and Alipay have dominated the domestic market for a long time, but they are now spreading around the world. These payment methods are often in direct contact with the consumers’ bank and offer convenient authorization solutions.

Most popular online payment methods

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

<table>
<thead>
<tr>
<th>Method</th>
<th>UK</th>
<th>BELGIUM</th>
<th>NETHERLANDS</th>
<th>ITALY</th>
<th>POLAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debit card or credit card</td>
<td>15%</td>
<td>24%</td>
<td>26%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>PayPal or similar</td>
<td>29%</td>
<td>35%</td>
<td>32%</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>Direct payment through my bank</td>
<td>8%</td>
<td>8%</td>
<td>6%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Invoice</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Cash on Delivery (COD)</td>
<td>9%</td>
<td>12%</td>
<td>6%</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Payment by instalments</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Other method</td>
<td>15%</td>
<td>18%</td>
<td>12%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>17%</td>
<td>24%</td>
<td>12%</td>
<td>26%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Have you at some point during the past year returned an item that you bought online?

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage who answered Yes</th>
<th>Percentage who answered No</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>46%</td>
<td>15%</td>
</tr>
<tr>
<td>Belgium</td>
<td>48%</td>
<td>12%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>42%</td>
<td>21%</td>
</tr>
<tr>
<td>Italy</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>Poland</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>Spain</td>
<td>40%</td>
<td>24%</td>
</tr>
<tr>
<td>Germany</td>
<td>50%</td>
<td>13%</td>
</tr>
<tr>
<td>France</td>
<td>50%</td>
<td>15%</td>
</tr>
<tr>
<td>Nordic region</td>
<td>52%</td>
<td>12%</td>
</tr>
</tbody>
</table>
“Many fail because they view Europe as one market”

Do you plan to expand to a European country? The expert provides tips on how to succeed.

MakesYouLocal helps e-retailers to succeed abroad. The company, which was founded more than ten years ago, has completed about 600 projects, most of them in the Nordic region and the rest of Europe.

Henrik Hansen, partner at MakesYouLocal, believes that many view Europe as one market and underestimate the challenge of multiple languages, currencies and cultures in the region.

“It is also the reason that many e-retailers do not succeed with their launches in one country,” he says.

At the same time, he believes that there isn’t any reason to be afraid to take the step across the border. It’s a matter of focusing on the right market and adapting to how it works.

“Once our customers have figured out what to do in one country, they often want to launch their businesses in more,” says Henrik Hansen.

Here are his three most important tips to e-retailers who want to begin to sell their products in a European country.

1. Choose the right market

“When I meet e-retailers who plan to launch their business abroad I usually ask what country they intended to begin with, and why. Unfortunately, the answers are usually based more on gut feeling than on facts. But that doesn’t work. You have to understand whether you can be profitable in the market and compete with the local participants. What do you have to offer that they don’t have? Why should people shop in your particular online store? Almost everyone wants to sell their products in Germany, the largest market in Europe, but that may not be realistic, because of the extremely intense competition. It may be better to begin with a smaller country or region, like the Nordic region or the Benelux countries. While fewer people live there, the economy is good. Such considerations should be addressed before you go into a country.

2. Adapt to the local market

“Adapting to the local market is extremely important – preferably, the customers should not notice that they are making online purchases from abroad. A common question is to what extent the website needs to be translated to the local language. I recommend translating the entire online store professionally, which has been shown to result in higher sales and more satisfied customers. Local customization also involves adjusting to how customers want to pay and have the goods delivered, returns should be convenient, and customer service should feel local. We call these factors security markers – they create security and get us to shop. But you don’t need an on-site staffed office, which would be expensive – especially if you are going to sell in many countries. It is better to find partners with local knowledge or operations in the country.

3. Find the best ways to market and sell

“There are experts who are on top of the fundamentals of sales and marketing in different markets, and such knowledge is very important. I know a company that spent a large amount of money to advertise on Facebook in Germany and wondered why it did not work. If they had asked us they would have learned that the Germans don’t like to be reached through Facebook ads, and that other channels are preferable there. But the rest you have to figure out yourself. And it is isn’t enough to check what the competitors are doing, because if you want to take market share, you have to be even better. Here we have seen a successful e-retailer take an agile approach by testing many different ideas over a short period and on a small scale. Then they evaluate the options and scale up the best ideas. With this approach they avoid spending money on sales and marketing that doesn’t work and quickly make progress.

Interview

Almost everyone wants to sell their products to Germany, the largest market in Europe, but that may not be realistic, because of the extremely intense competition.”

Henrik Hansen, partner at MakesYouLocal.

MakesYouLocal

» Founded: 2010 in Denmark.
» Offices: in Copenhagen, Vilnius and Stockholm.
» Employees: about 45.
» Business: helps e-retailers to launch their businesses abroad, with services ranging from analysis and strategy, to implementation, translation and local customer service.

Germany, the largest market in Europe, but that may not be realistic, because of the extremely intense competition. It may be better to begin with a smaller country or region, like the Nordic region or the Benelux countries. While fewer people live there, the economy is good. Such considerations should be addressed before you go into a country.
The UK has long been a bright star on the European e-commerce horizon, with digitally mature consumers and the highest average purchases in Europe. Fashion pioneers such as Asos and Marks & Spencer enable the British to dress in style, while food is served online on silver platters through grocery chains such as Tesco and Ocado. Regarding marketplaces, Amazon and eBay are the given browsing favorites.

Political developments in the UK in recent times have been dominated by Brexit, which at the time of writing (September 2019) has not yet become reality. One of the arguments from Brexit supporters before the 2016 referendum was that leaving the EU would make it possible for the UK to pursue a more liberal trade policy in relation to countries outside the union. However, an exit may entail customs controls on deliveries and returns between the UK and the EU, which could make it more complicated for e-commerce.

### Key indicators compared with average for Europe

<table>
<thead>
<tr>
<th>Indicator</th>
<th>UK (%)</th>
<th>Average for Europe (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet penetration</td>
<td>96%</td>
<td>91%</td>
</tr>
<tr>
<td>Percentage of e-commerce consumers</td>
<td>65%</td>
<td></td>
</tr>
<tr>
<td>Percentage of e-commerce consumers abroad</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average purchase per year (EUR)</td>
<td></td>
<td>EUR 1,007</td>
</tr>
<tr>
<td>Growth in number of e-commerce consumers since 2014</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

### Delivery with precision wins British hearts

The British e-commerce consumer moves quickly between various channels and it is becoming increasingly common to integrate the shopping experience with social media, such as Instagram, through one-click shop-solutions. To build loyalty, many British e-commerce companies use membership, which may entail extra fast deliveries. In London it is common to receive the products within just a few hours, and precision - delivering the right product at the right time - is very important. Here, online food retailing has grown larger than anywhere else in Europe and customers have become accustomed to narrow time windows. Grocery chain Ocado has been a driving force and is now testing delivery of certain orders within one hour in London. Regarding payment methods, Paypal and card payments are clearly dominant.

### Niche products are popular - and so is home delivery

The British mainly purchase books, fashion products and home electronics online. The shopping experience often begins with a search on Amazon, where an impressive 67 percent of e-commerce consumers have shopped in the past year. But eBay also has a strong position in the country. The British market is large and has many consumers who are accustomed to online shopping. This makes it an excellent destination for e-retailers from other countries who want to try to export somewhat unique and niche products.

### Latent potential among middle-aged consumers?

Regarding choice of online store, the British consumer differs from the typical European on at least three points. First, the British feel that it is more important that the total price, including additional costs, is clear. Second, they demand the best possible price to a greater degree. Third, they want all relevant information in English. Interestingly, the percentage of British consumers who shop online at some time is highest among people between the ages of 50 and 64. It can therefore be worth considering whether e-retailers in the British market have focused adequately on this target group.

### UK: Brexit creates uncertainty

The UK has long been a bright star on the European e-commerce horizon, with digitally mature consumers and the highest average purchases in Europe. Fashion pioneers such as Asos and Marks & Spencer enable the British to dress in style, while food is served online on silver platters through grocery chains such as Tesco and Ocado. Regarding marketplaces, Amazon and eBay are the given browsing favorites. Political developments in the UK in recent times have been dominated by Brexit, which at the time of writing (September 2019) has not yet become reality. One of the arguments from Brexit supporters before the 2016 referendum was that leaving the EU would make it possible for the UK to pursue a more liberal trade policy in relation to countries outside the union. However, an exit may entail customs controls on deliveries and returns between the UK and the EU, which could make it more complicated for e-commerce.

### Did you know that...

The population of the UK has increased by more than three million since 2014.
At the time of writing, Belgium is number one in FIFA’s world ranking in soccer, which is impressive for a country with a population of only eleven million. The country is not equally prominent in e-commerce, though Belgium comes in at a respectable ninth place in DESI, which is the EU ranking of the digital competitiveness of its member countries. The country scores particularly high on internet access and integration of digital technology in business.

A unique characteristic of Belgium is that the country has succeeded in marketing itself as a gateway to Europe among non-European companies. Acknowledgement of this came in 2018 when Chinese e-commerce giant Alibaba chose Liege in Belgium as the base for its first distribution center in Europe.

Culturally, historically and economically, Belgium otherwise has strong ties to the Netherlands, which is evident from its consumption patterns. Other than Vanden Borre, which sells electronics, Belgium has few large domestic e-commerce participants, and Belgians shop instead from sites based in the Netherlands.

Large potential for new market participants

Belgium should be of great interest to retailers searching for new markets on which to become established. The country has a good IT infrastructure and competition online is lower than for example in Germany. However, there are a few things to keep an eye on. First, it is important to be able to communicate with customers in the country’s three official languages: Flemish, French and German. In addition, it is important to accept card payments, Paypal and preferably also direct payments. Offering convenient home delivery methods during the day is also appreciated to a greater degree by Belgians than by other Europeans. However, fast delivery is less important. Less than one quarter of consumers feel that speed is important, which can be compared with close to fifty percent in the neighboring country, the Netherlands.

Belgium: cross-border e-commerce

At the time of writing, Belgium is number one in FIFA’s world ranking in soccer, which is impressive for a country with a population of only eleven million. The country is not equally prominent in e-commerce, although Belgium comes in at a respectable ninth place in DESI, which is the EU ranking of the digital competitiveness of its member countries. The country scores particularly high on internet access and integration of digital technology in business. A unique characteristic of Belgium is that the country has succeeded in marketing itself as a gateway to Europe among non-European companies. Acknowledgement of this came in 2018 when Chinese e-commerce giant Alibaba chose Liege in Belgium as the base for its first distribution center in Europe.

Culturally, historically and economically, Belgium otherwise has strong ties to the Netherlands, which is evident from its consumption patterns. Other than Vanden Borre, which sells electronics, Belgium has few large domestic e-commerce participants, and Belgians shop instead from sites based in the Netherlands.

Belgian e-commerce consumers mainly buy fashion, home electronics and cosmetics online. As previously mentioned, shopping from other countries is extremely popular, especially from the Netherlands, but also from China and Germany. Belgian men aged 30 to 49 years are more likely to make cross-border online purchases, especially from the Netherlands, Germany and the US, and the most attractive products are in sports and home electronics. Among the marketplaces, German Zalando is most popular, especially among young women. One thing that stands out is that Alibaba is larger on the Belgian market than Amazon, at least regarding the percentage of consumers who have shopped from each site. In all, 21 percent have made purchases from Alibaba during the past year, compared with 17 percent from Amazon.

Did you know that...
The proportion of Belgians who made online purchases has increased by an impressive 19 percentage points since 2014.

Key indicators compared with average for Europe

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Average for Europe</th>
<th>Belgium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet penetration</td>
<td>91%</td>
<td>85%</td>
</tr>
<tr>
<td>Percentage of e-commerce consumers</td>
<td>85%</td>
<td>68%</td>
</tr>
<tr>
<td>Percentage of e-commerce consumers abroad</td>
<td>68%</td>
<td>24%</td>
</tr>
<tr>
<td>Average purchase per year (EUR)</td>
<td>EUR 560</td>
<td></td>
</tr>
</tbody>
</table>

Growth in number of e-commerce consumers since 2014

Young people searching for brands and mature price hunters

The digital generation gap is large in Belgium, but e-commerce is so common that an impressive 85 percent of people over the age of 65 have purchased products online at some time. The reason is often better prices.

However, young men shop online most. They are mainly attracted by the broader selection, usually in narrow niche and brand products.

Popular to make online purchases across the country’s borders

Belgian e-commerce consumers mainly buy fashion, home electronics and cosmetics online. As previously mentioned, shopping from other countries is extremely popular, especially from the Netherlands, but also from China and Germany. Belgian men aged 30 to 49 years are more likely to make cross-border online purchases, especially from the Netherlands, Germany and the US, and the most attractive products are in sports and home electronics. Among the marketplaces, German Zalando is most popular, especially among young women.

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Top three international marketplaces

From which of the following e-commerce sites have you shopped online in the past year?

- Zalando
- Alibaba
- Amazon

Most commonly bought products online

Percentage of e-commerce consumers who have made purchases from each respective product category over the past year.

- Clothing and footwear
- Home electronics
- Cosmetics and skincare
- Books
- Home furnishings
- Sports and leisure
- Toys
- Dietary supplements
Netherlands: foremost in the world according to the UN

The Netherlands has become known for having one of the most well-developed e-commerce markets in Europe. For example, the orange banner waved at the top of the most well-developed e-commerce markets in Europe. The Netherlands has the largest share of young people aged 15 to 29 – an attractive target group for e-retailers. However, many foreign e-retailers have avoided full establishment in the Netherlands and have focused instead on larger markets such as Germany, France, or the UK. The market in the Netherlands is therefore dominated for now by domestic market participants such as Bol.com (which sells products such as books and toys), Coolblue (which sells home electronics) and Albert Heijn (which sells groceries). But this domestic dominance may weaken in the future as Dutch consumers have spontaneously begun to look across borders, mainly in search of better prices.

Did you know that... The share of people in the Netherlands who buy products online from foreign markets has increased by as much as 35 percentage points since 2014.

Key indicators compared with average for Europe

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Netherlands</th>
<th>Average for Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet penetration</td>
<td>96%</td>
<td>92%</td>
</tr>
<tr>
<td>Percentage of e-commerce consumers</td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>Average purchase per year (EUR)</td>
<td>EUR 651</td>
<td></td>
</tr>
<tr>
<td>Growth in number of e-commerce consumers since 2014</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

Highest demand for fast deliveries

People in the Netherlands want extremely fast deliveries. One third of consumers expect delivery after two days, which is higher than in any other European country. The reason is that the Netherlands is one of the most densely populated countries in the world, and consumers often shop on websites within the country that have short lead times. Foreign market participants who wish to become established in the Netherlands should therefore consider local warehouses.

Regarding payments, unconventional payment methods are commonly employed. The mobile solution Ideal is currently essential for e-retailers. With as many as 400 million transactions each year, Ideal accounts for over 50 percent of the domestic payment market with respect to e-commerce.

Great interest in fashion

Consumers in the Netherlands are interested in fashion – only the Germans buy as much clothing and footwear online. In addition, Zalando is currently the hottest marketplace online. One third of e-commerce consumers have shopped here during the past year. Low prices at Alibaba and Wish also attract many people who buy products online, even though delivery times from China are probably longer than what many people in the Netherlands would like. Other fast-growing categories in the country include cosmetics and toys.

Large share of young people in the population

Among the larger markets in Europe, the Netherlands has the largest share of young people aged 15 to 29 – an attractive target group for e-retailers. Young people typically make many purchases using their cell phones. As many as 85 percent of e-commerce consumers in the Netherlands aged 18 to 29 have used a cell phone to make purchases over the past year. In order to be relevant for this group, the purchase journey must be personalized and use the proper channels. WhatsApp and Facebook are the largest social channels among young people in the Netherlands and thus are potential display windows for e-retailers. Other potential paths to success include creating online communities that are integrated with marketing via influencers on Instagram, and creating online communities that are integrated with the purchase experience.
Although Italy slipped into recession in early 2019, the digitalization trend is far from standing still. The number of e-commerce consumers is skyrocketing and much is happening. Amazon has invested more than EUR 1.6 billion in its Italian operation since 2010, and raised interest in e-commerce in the country. In the metropolitan areas, Lidl has just begun to offer same-day delivery of groceries and the price comparison site Idea- lo in Italy grew by an impressive 20 percent in 2018. The EU also pumps in large amounts to raise the level of the digital infrastructure in Italy, especially in the south where the infrastructure is less developed.

Domestic e-commerce market participants include Esselunga, a traditional grocery chain that now focuses on home deliveries, Yoox, which sells luxury fashion brands, and ePrice, which sells home electronics at low prices, and also offers installation and maintenance of household appliances.

Did you know that...
There are 14 million more Italian e-commerce consumers who buy products online today than in 2014.

Key indicators compared with average for Europe

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Italy</th>
<th>Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet penetration</td>
<td>81%</td>
<td>81%</td>
</tr>
<tr>
<td>Percentage of e-commerce consumers</td>
<td>78%</td>
<td>78%</td>
</tr>
<tr>
<td>Percentage of e-commerce consumers abroad</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Average purchase per year (EUR)</td>
<td>EUR 852</td>
<td>EUR 852</td>
</tr>
<tr>
<td>Growth in number of e-commerce consumers since 2014</td>
<td>60%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Amazon is broadening Italy e-commerce

Italian consumers buy substantially more books, home electronics, building products, car accessories and sports products online than the average European who shops online. One explanation is the major role that Amazon plays in the country. An impressive 93 percent of those who shop online have bought products from Amazon over the past year, which is more than in any other European country. Zalando and eBay also have strong positions. According to Business Sweden, eBay has 35 million professional sellers in the Italian market, and Zalando recently introduced a collaboration with the Italian postal service Poste Italiane that makes it possible for Zalando customers to return products at 12,000 post offices around the country.

A country with many differences

Italy is a large country with many differences. According to the European organization for e-commerce, EMOTA, 87 percent of Italian e-commerce consumers live in cities and 13 percent in rural areas. Moreover, average incomes are about twice as high in the north as in the south. Unlike the younger generation, the older generation rarely speaks English. Consequently, anyone who wants to establish a presence in Italy must adapt the website and customer service to the local language. For those who wish to reach Italian consumers, Facebook is often the most effective online marketing channel, though Youtube and Instagram are also popular.
E-commerce in Europe 2019

E-commerce in Europe 2019

Key indicators compared with average for Europe

<table>
<thead>
<tr>
<th>Percentage of e-commerce consumers</th>
<th>80%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of e-commerce consumers abroad</td>
<td>55%</td>
</tr>
<tr>
<td>Average purchase per year (EUR)</td>
<td>EUR 523</td>
</tr>
<tr>
<td>Growth in number of e-commerce consumers since 2014</td>
<td>28%</td>
</tr>
</tbody>
</table>

Did you know that...

In 2014, 22 percent of Polish consumers purchased products online from abroad. In 2019, the figure was 55 percent.

Poland: strongly growing economy and e-commerce

Polish e-commerce is steadily growing. The number of e-commerce consumers is still lower than the average in Europe, but it has grown by 28 percentage points since 2014. In addition, the national Sunday shopping ban introduced in 2018 has given e-commerce an extra push. Under the legislation, physical stores were initially required to be closed two Sundays each month, but in 2019 the ban was expanded to three Sundays. The impact of the ban has been particularly severe for small stores and many small market participants have suffered from declining sales. But since the ban only applies to physical stores, e-commerce has probably benefited from it.

Consequently, Poland’s relatively young e-commerce market is in an expansionary phase and has good growth potential. There are many small online stores, which pave the way for larger market participants with resources to make more long-term investments. A large population and strong economic growth also help to boost Poland as an e-commerce country.

Returns viewed as a given

Regarding delivery, Polish consumers have high expectations for low prices, speed and flexibility. Willingness to pay for fast delivery is second highest in Europe, after Italy. As many as 43 percent state they are prepared to pay more for next-day delivery. In addition, 66 percent want to be able to change the delivery date or time after the products have shipped, which is the highest percentage in Europe. Returns are considered to be a given, and Polish consumers top the list in Europe here too. 97 percent assume that it should be possible to return a product purchased online. Regarding payments, Polish consumers prefer direct bank payments and cash on delivery to a greater extent than other Europeans.

International purchases continue to be limited – but rising

The percentage who make online purchases from abroad is still at a comparatively low level: 55 percent, but has increased by 5 percentage points since last year. Language barriers continue to be an obstacle, as 6 of 10 Polish consumers state that it is important that the online store where they shop should be available in Polish.

At the same time, price awareness drives consumers to make international purchases, and China is the most popular country from which to shop online. Their second choice is Germany, which can offer good delivery to Poland because of its geographic location. The domestic marketplace Allegro.pl has a strong position on the market, but both Amazon and Zalando have carried out major initiatives in the country.

Spotlight on delivery when Polish consumers shop online

Polish consumers focus on low price and convenient delivery when they shop online. Clarity and speed are also important. In all, 78 percent state that it is important for the total price, including shipping, to be clearly reported with the purchase, and 23 percent expect one- to two-day delivery.

Logistics developments are driven both by local market participants such as Allegro.pl, and by the entrance of the foreign giants. For example, Amazon has established several logistics centers in Poland, one of which is one of the company’s most technologically advanced facilities. Proximity to the large German market, combined with lower wage levels, are among the explanations.
Spain was one of the countries most severely affected by the 2008 financial crisis, and a number of fiscal measures to promote the economy have been implemented. But despite the economic challenges, e-commerce has grown sharply in recent years, and the number of e-commerce consumers has steadily increased. Spain also has many smartphone users, and messaging apps such as WhatsApp are extremely popular.

Since the 2018 launch of the business version of WhatsApp, which enables companies to communicate with customers via, for example, automated customer service, there is good reason for e-retailers to address their presence on such platforms. E-commerce is considered to have good growth potential, even though Spanish consumers have become price sensitive in the aftermath of the financial crisis.

Free shipping is important to Spanish consumers

The focus on low costs can also be seen in the trend in which 64 percent of Spanish e-commerce consumers consider free shipping to be important when choosing the store where they will shop, which is the highest percentage in Europe. Regarding delivery, home delivery is extremely popular. However, more market participants are now beginning to charge for home delivery of small orders. The reason is that the number of orders is growing, while the value of the average order is declining. Recognition is also important to Spanish consumers. In all, 41 percent want to know the company or brand where they shop, which is more than in other countries.
Germany: a mature giant in e-commerce

Germany is not only one of the largest e-commerce markets in Europe, but also in the world, with many well-established participants and strong pressure on prices. New e-commerce consumers arrive all the time, but growth is lower than on markets where e-commerce is not yet as well accepted. Competition is intense due to the high level of maturity. At the same time, purchasing power is strong and the average purchase by German consumers is at a high level.

German consumers are increasingly using mobile devices instead of the computer when shopping online. Consequently, app versions of online stores and mobile friendly websites have become increasingly important for e-retailers. In addition, digital voice assistants such as Amazon Echo and Google Home, which may eventually become important sales and marketing channels, have gained in popularity in recent years.

Cash is king – but card payments are rising

German consumers prefer to pay cash. Though use of payment cards has increased considerably in recent years, especially among younger consumers. This trend can also be clearly seen in how German consumers want to pay for products purchased online. Paypal is the most popular payment method, followed by payment on invoice (only Swedish consumers prefer invoices to a greater degree than German consumers). Experiencing trust in the payment process is generally extremely important for German e-commerce consumers.

Regarding returns, Germany has the highest return rate of all the countries in the report. In all, 53 percent state that they have returned an online purchase in the past year. Clothing and footwear are the most common products that are sent back.

Amazon is extremely popular in Germany

German e-commerce is dominated by a number of large marketplaces. The two largest are Amazon.de and Otto.de, where Amazon is clearly the leader with a market share of about 50 percent. Amazon is therefore an extremely important channel for e-retailers who want to become established in Germany, especially since many consumers also use the platform as a search engine.

Fashion is a popular and important e-commerce category. Regarding e-commerce from abroad, there has not been much of an increase since 2014, which may be because of strong domestic market participants such as Zalando.

Hidden fees discourage German consumers

The focus on price is less in Germany than in the other European countries, although there are many price comparison services that contribute to price pressures in the market. Instead, clarity is prioritized. German consumers do not like to be surprised by hidden fees and the most important criterion for making e-commerce-related decisions is that the total price, including shipping, must be clearly displayed. Aversion to hidden fees may also result in skepticism toward foreign online stores, probably based on a concern about high shipping costs and unclear delivery terms.
France: large market with growing mobile e-commerce

With its population of over 65 million, France is a large and important e-commerce market and it is constantly growing. The country is also one of the largest economies in Europe. Purchasing power is high and as the use of smartphones rises, the option for e-commerce via cell phone is becoming increasingly important. However, use of Facebook has declined in France, with Instagram and Snapchat taking over, especially among younger people. Consequently, e-retailers should review their marketing channels.

France has a long tradition of local bank cards, which has created a solid foundation for card payments. Credit and debit cards are the most popular payment method when French consumers shop online, followed by PayPal. Regarding delivery, home delivery is less popular in France than in the other European countries. Instead, French consumers prefer delivery in the mailbox. Pickup from a service outlet also ranks much higher in France than in neighboring countries - this option is only more popular in Finland and Sweden. Fast delivery is not particularly in demand; only 16 percent expect two-day delivery. However, flexibility regarding delivery is almost as important as price.

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Flash sales popular among French consumers

Domestic marketplaces have an important position on the French e-commerce market. Some large market participants include Amazon.fr, Cdiscount.com and Veepee.fr. The latter is what is known as a ‘flash sale’ participant that focuses on temporary campaigns and sells products at a discount during limited periods. In order to shop, customers must register as a member. Flash sales are generally popular in France and are considered to be an important driving force of mobile e-commerce growth since impulse purchases can be made more easily using a cell phone than using a desktop computer. Two thirds of French consumers have shopped online from abroad, which is an increase of 24 percentage points since 2014.

Local adaptation extra important when becoming established

Adapting the language is essential for anyone who wants to become established in France. Six of ten French consumers feel that it is important that the online store is available in French. Otherwise, clear prices and delivery terms rank high.

Regarding product categories, an interesting development is underway in food, where Amazon has partnered with food group Groupe Casino for fast delivery of food. There are still geographic restrictions, but an expansion to more French cities is planned over the coming year. Amazon is also installing delivery lockers in about 1,000 Casino stores where consumers can pick up their Amazon orders.

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Nordic region: small but digital countries

The Nordic countries have strong traditions of entrepreneurship and a well-developed digital infrastructure. Nowadays, there is almost always access to mobile internet - and thus potential e-commerce consumers - in the Swedish forests, the Danish fields, the Norwegian mountains, or by the Finnish lakes. This can be clearly seen in the ranking of the Nordic EU members in DESI, the EU Commission’s digitization index. Here Finland is first, Sweden second and Denmark comes in fourth. Nordic consumers share many things in common, but the EU Commission’s digitization index. Here Finland is seen in the ranking of the Nordic EU members in DESI, mountains, or by the Finnish lakes. This can be clearly in the Swedish forests, the Danish fields, the Norwegian internet - and thus potential e-commerce consumers - in the Nordic region is among the highest in the world.

Key indicators compared with average for Europe

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Average for Europe</th>
<th>Nordic region</th>
<th>Sweden</th>
<th>Norway</th>
<th>Denmark</th>
<th>Finland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet penetration</td>
<td>98%</td>
<td>94%</td>
<td>95%</td>
<td>94%</td>
<td>89%</td>
<td>98%</td>
</tr>
<tr>
<td>Percentage of e-commerce consumers</td>
<td>81%</td>
<td>81%</td>
<td>84%</td>
<td>78%</td>
<td>85%</td>
<td>91%</td>
</tr>
<tr>
<td>Average purchase per year (EUR)</td>
<td>EUR 817</td>
<td>EUR 817</td>
<td>EUR 817</td>
<td>EUR 817</td>
<td>EUR 817</td>
<td>EUR 817</td>
</tr>
<tr>
<td>Growth in number of e-commerce consumers since 2014</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Did you know that...

Internet penetration in the Nordic region is among the highest in the world.

Parcel machines and mobile payments gaining ground

The Nordic countries have high participation in the e-commerce, and Nordic consumers often have long commutes to work. In order for e-commerce to fit in the puzzle of life, freedom of choice and flexibility regarding deliveries are important. If the parcel is too large to fit in the mailbox, Nordic consumers will often pick it up at a distribution point on the way home from work. But more flexible delivery solutions are necessary to cope with the growth of e-commerce. Parcel machines have begun to pop up in recent times, especially in urban areas.

Regarding payments, the situation varies. In Norway, and especially in Denmark, card payments are most popular, while invoice solutions are common in Sweden. Mobile payments are also gaining ground through MobilePay in Denmark, Swish in Sweden and Vipps in Norway.

Still no international marketplaces

Nordic consumers prefer to buy fashion, home electronics and cosmetics online. Favorite sites in fashion include Zalando and H&M, while Komplett, Netonnet and Elgiganten are popular in home electronics. So far, food online works best in Denmark, which has short distances and is densely populated. Nordic consumers buy products from other countries considerably more than other Europeans. They often hunting for lower prices, but they also want to find a larger selection or niche products. In addition to Zalando, eBay and Wish are popular foreign online shopping sites. Much has been said about Amazon’s grand entrance onto the Nordic market, but other than Zalando, e-commerce warehouse outside Stockholm, the international marketplaces lack a local base.

Local adaptation extra important when becoming established

Retail sales are currently at an important breakpoint in many of the Nordic countries. E-commerce has reached such levels that traditional chains must quickly digitize the business model to avoid losing market share. Sweden and Denmark, are most advanced in this process, followed by Norway and finally Finland, which is somewhat less mature regarding e-commerce. At the same time, many former dedicated e-retailers are now opening physical concept stores in urban areas.

Regarding e-commerce, about two thirds of Nordic e-commerce consumers have used their phone or tablet to shop online during the past year.

Most commonly bought products online

<table>
<thead>
<tr>
<th>Category</th>
<th>Clothing and footwear</th>
<th>Home electronics</th>
<th>Cosmetics and skincare</th>
<th>Books</th>
<th>Food</th>
<th>DIY and garden</th>
<th>Sport and leisure</th>
<th>Home furnishing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>59%</td>
<td>43%</td>
<td>32%</td>
<td>30%</td>
<td>22%</td>
<td>23%</td>
<td>22%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Top three preferred delivery methods

How do you prefer to have your product delivered when you shop online?

- From which of the following e-commerce sites have you shopped online in the past year?

- Top three international marketplaces

- Most commonly bought products online

Highlight on: Nordic region
**Detailed results**

The survey was conducted in the spring of 2019 by the research company Nepa. The number of respondents varies somewhat between the countries. In most countries about 1,000 people responded to the survey. The Nordic countries, however, are presented as a single region with about 500 respondents from each country. The survey was carried out online, which means the results are relevant for people who have internet access. In order to comment on the population as a whole, calculations have therefore been made based on internet penetration and population statistics for each country.

**Results from the survey**

<table>
<thead>
<tr>
<th>Category</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopped online in the past year</td>
<td>94%</td>
<td>89%</td>
<td>94%</td>
<td>94%</td>
<td>95%</td>
<td>93%</td>
<td>95%</td>
<td>93%</td>
<td>92%</td>
</tr>
<tr>
<td>Have shopped online</td>
<td>95%</td>
<td>94%</td>
<td>96%</td>
<td>93%</td>
<td>96%</td>
<td>97%</td>
<td>97%</td>
<td>96%</td>
<td>96%</td>
</tr>
<tr>
<td>Have shopped online from abroad</td>
<td>71%</td>
<td>79%</td>
<td>71%</td>
<td>64%</td>
<td>68%</td>
<td>82%</td>
<td>72%</td>
<td>73%</td>
<td>86%</td>
</tr>
</tbody>
</table>

**Internet penetration**

<table>
<thead>
<tr>
<th>Country</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet penetration*</td>
<td>96%</td>
<td>91%</td>
<td>96%</td>
<td>81%</td>
<td>82%</td>
<td>87%</td>
<td>95%</td>
<td>92%</td>
<td>98%</td>
</tr>
</tbody>
</table>

**Population**

<table>
<thead>
<tr>
<th>Category</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total, millions</td>
<td>66.3</td>
<td>11.4</td>
<td>17.2</td>
<td>60.5</td>
<td>38.0</td>
<td>46.7</td>
<td>82.8</td>
<td>66.9</td>
<td>28.7</td>
</tr>
<tr>
<td>Percentage aged 15–79 years</td>
<td>77%</td>
<td>77%</td>
<td>77%</td>
<td>60%</td>
<td>80%</td>
<td>79%</td>
<td>80%</td>
<td>79%</td>
<td>78%</td>
</tr>
<tr>
<td>Aged 15–79, millions</td>
<td>51.2</td>
<td>8.8</td>
<td>13.7</td>
<td>30.4</td>
<td>36.8</td>
<td>66.5</td>
<td>50.8</td>
<td>20.8</td>
<td></td>
</tr>
</tbody>
</table>

**Entire population (15–79 years)**

<table>
<thead>
<tr>
<th>Category</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basis Shopped online in the past year</td>
<td>91%</td>
<td>81%</td>
<td>90%</td>
<td>76%</td>
<td>78%</td>
<td>81%</td>
<td>90%</td>
<td>86%</td>
<td>90%</td>
</tr>
<tr>
<td>Basis Have shopped online</td>
<td>95%</td>
<td>85%</td>
<td>92%</td>
<td>78%</td>
<td>80%</td>
<td>85%</td>
<td>92%</td>
<td>88%</td>
<td>94%</td>
</tr>
<tr>
<td>Basis Have shopped online from abroad</td>
<td>65%</td>
<td>66%</td>
<td>66%</td>
<td>55%</td>
<td>69%</td>
<td>68%</td>
<td>64%</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Basis Have shopped, millions</td>
<td>45.6</td>
<td>75.0</td>
<td>126.4</td>
<td>37.8</td>
<td>245.4</td>
<td>313.2</td>
<td>119.5</td>
<td>45.0</td>
<td>18.6</td>
</tr>
<tr>
<td>Basis Have shopped online from abroad, millions</td>
<td>33.3</td>
<td>6.6</td>
<td>50.0</td>
<td>37.6</td>
<td>36.2</td>
<td>25.5</td>
<td>44.1</td>
<td>33.7</td>
<td>15.0</td>
</tr>
</tbody>
</table>

**Average spend and turnover**

<table>
<thead>
<tr>
<th>Category</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average spend in one year, local currency (Basis: Have shopped online)</td>
<td>888.9</td>
<td>560.4</td>
<td>651.1</td>
<td>851.6</td>
<td>2244.3</td>
<td>786.0</td>
<td>847.5</td>
<td>841.8</td>
<td>857.1</td>
</tr>
<tr>
<td>Exchange rate May 29, 2019, EUR</td>
<td>1.13</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>0.23</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>Average spend in one year, EUR (Basis: Have shopped online)</td>
<td>1007.1</td>
<td>560.4</td>
<td>651.1</td>
<td>851.6</td>
<td>2244.3</td>
<td>786.0</td>
<td>847.5</td>
<td>841.8</td>
<td>857.1</td>
</tr>
<tr>
<td>Average spend in one year, EUR (Basis: entire population aged 15–79)</td>
<td>920.5</td>
<td>478.2</td>
<td>600.5</td>
<td>668.1</td>
<td>418.9</td>
<td>665.4</td>
<td>783.8</td>
<td>745.7</td>
<td>769.3</td>
</tr>
<tr>
<td>Total turnover, EUR billions</td>
<td>47.1</td>
<td>4.2</td>
<td>8.2</td>
<td>32.1</td>
<td>12.8</td>
<td>24.4</td>
<td>52.1</td>
<td>37.8</td>
<td>16.0</td>
</tr>
</tbody>
</table>

**Product categories**

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

<table>
<thead>
<tr>
<th>Category</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
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<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing/shoes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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### CDs

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### Car accessories

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### Toys

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### Children's items

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### Dietary supplements and similar

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<td>13.1</td>
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### Shopping from abroad by young consumers

**Number of individuals in age group 18-29 years who shop online at least once a quarter**

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<td>Proportion 2015</td>
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### Product categories (e-commerce from abroad)

#### What types of products have you bought online from abroad in the past year?

(Basis: Entire population, 15-79 years)

**Clothing/shoes**

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<td>25%</td>
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**Home electronics**

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**Books (physical and audiobooks)**

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**Cosmetics, haircare and skincare**

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**Movies**

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**Sports and leisure products**

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**Food**

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### Product categories (e-commerce from abroad) cont.

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<td>1.0</td>
<td>0.7</td>
<td>2.0</td>
<td>2.1</td>
<td>0.2</td>
<td>0.2</td>
</tr>
</tbody>
</table>

#### Car accessories

<table>
<thead>
<tr>
<th>Region</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>12%</td>
<td>9%</td>
<td>10%</td>
<td>5%</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>2.2</td>
<td>0.3</td>
<td>0.6</td>
<td>3.7</td>
<td>1.4</td>
<td>2.5</td>
<td>2.1</td>
<td>2.6</td>
<td>0.4</td>
</tr>
</tbody>
</table>

#### Toys

<table>
<thead>
<tr>
<th>Region</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>1.6</td>
<td>0.3</td>
<td>0.5</td>
<td>1.9</td>
<td>1.0</td>
<td>1.9</td>
<td>2.2</td>
<td>2.1</td>
<td>0.2</td>
</tr>
</tbody>
</table>

#### Children's items

<table>
<thead>
<tr>
<th>Region</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>11%</td>
<td>6%</td>
<td>5%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>2.1</td>
<td>0.3</td>
<td>0.5</td>
<td>1.6</td>
<td>1.8</td>
<td>1.6</td>
<td>2.2</td>
<td>3.1</td>
<td>0.3</td>
</tr>
</tbody>
</table>

#### Which payment method is preferred?

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

<table>
<thead>
<tr>
<th>Region</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debit card or credit card</td>
<td>48%</td>
<td>62%</td>
<td>30%</td>
<td>34%</td>
<td>24%</td>
<td>47%</td>
<td>18%</td>
<td>60%</td>
<td>41%</td>
</tr>
<tr>
<td>Invoice</td>
<td>0%</td>
<td>2%</td>
<td>9%</td>
<td>1%</td>
<td>1%</td>
<td>24%</td>
<td>7%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Direct payment through my bank</td>
<td>2%</td>
<td>12%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>6%</td>
<td>2%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>PayPal or similar</td>
<td>40%</td>
<td>21%</td>
<td>25%</td>
<td>55%</td>
<td>27%</td>
<td>43%</td>
<td>50%</td>
<td>33%</td>
<td>21%</td>
</tr>
<tr>
<td>Cash on Delivery</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>9%</td>
<td>9%</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Payment by instalments</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Other method</td>
<td>1%</td>
<td>1%</td>
<td>8%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

### How important are the following e-commerce criteria?

Percentage of e-commerce consumers who consider the following criteria to be very important if they are to shop online.

<table>
<thead>
<tr>
<th>Region</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total price is clearly printed, including shipping and other fees</td>
<td>75%</td>
<td>69%</td>
<td>62%</td>
<td>73%</td>
<td>78%</td>
<td>73%</td>
<td>68%</td>
<td>74%</td>
<td>74%</td>
</tr>
<tr>
<td>There are good, clear details about and photos of the product</td>
<td>68%</td>
<td>67%</td>
<td>60%</td>
<td>72%</td>
<td>76%</td>
<td>66%</td>
<td>61%</td>
<td>61%</td>
<td>69%</td>
</tr>
<tr>
<td>It is simple to navigate on the website</td>
<td>46%</td>
<td>46%</td>
<td>44%</td>
<td>54%</td>
<td>48%</td>
<td>46%</td>
<td>46%</td>
<td>49%</td>
<td>52%</td>
</tr>
<tr>
<td>Lowest price</td>
<td>44%</td>
<td>42%</td>
<td>41%</td>
<td>50%</td>
<td>42%</td>
<td>48%</td>
<td>35%</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>I know the market participant/brand</td>
<td>29%</td>
<td>27%</td>
<td>28%</td>
<td>39%</td>
<td>27%</td>
<td>41%</td>
<td>26%</td>
<td>36%</td>
<td>25%</td>
</tr>
<tr>
<td>I don’t have to register/become a member to shop online</td>
<td>23%</td>
<td>24%</td>
<td>24%</td>
<td>26%</td>
<td>32%</td>
<td>29%</td>
<td>27%</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Fast delivery (not more than three days)</td>
<td>37%</td>
<td>38%</td>
<td>42%</td>
<td>47%</td>
<td>53%</td>
<td>49%</td>
<td>35%</td>
<td>41%</td>
<td>28%</td>
</tr>
<tr>
<td>Free shipping</td>
<td>41%</td>
<td>54%</td>
<td>48%</td>
<td>62%</td>
<td>58%</td>
<td>64%</td>
<td>40%</td>
<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Clear instructions explaining how to return the product</td>
<td>40%</td>
<td>49%</td>
<td>49%</td>
<td>65%</td>
<td>53%</td>
<td>60%</td>
<td>45%</td>
<td>54%</td>
<td>47%</td>
</tr>
<tr>
<td>The website is available in my language</td>
<td>67%</td>
<td>52%</td>
<td>50%</td>
<td>63%</td>
<td>63%</td>
<td>60%</td>
<td>57%</td>
<td>60%</td>
<td>45%</td>
</tr>
<tr>
<td>Delivery price</td>
<td>63%</td>
<td>62%</td>
<td>52%</td>
<td>68%</td>
<td>70%</td>
<td>69%</td>
<td>57%</td>
<td>68%</td>
<td>56%</td>
</tr>
<tr>
<td>Fast delivery process</td>
<td>44%</td>
<td>23%</td>
<td>44%</td>
<td>50%</td>
<td>56%</td>
<td>53%</td>
<td>35%</td>
<td>41%</td>
<td>27%</td>
</tr>
<tr>
<td>That the date and time when the product will be delivered is clearly stated on the date when the order is placed</td>
<td>39%</td>
<td>45%</td>
<td>50%</td>
<td>53%</td>
<td>47%</td>
<td>57%</td>
<td>31%</td>
<td>46%</td>
<td>28%</td>
</tr>
<tr>
<td>That I am able to decide on the delivery time myself</td>
<td>25%</td>
<td>31%</td>
<td>35%</td>
<td>49%</td>
<td>38%</td>
<td>56%</td>
<td>23%</td>
<td>32%</td>
<td>20%</td>
</tr>
<tr>
<td>That I am able to personally decide where the product will be delivered</td>
<td>53%</td>
<td>54%</td>
<td>45%</td>
<td>60%</td>
<td>59%</td>
<td>60%</td>
<td>35%</td>
<td>63%</td>
<td>44%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Region</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivered to my mailbox/multi-occupancy mailbox by the mail carrier</td>
<td>14%</td>
<td>20%</td>
<td>18%</td>
<td>11%</td>
<td>6%</td>
<td>16%</td>
<td>37%</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Collected it myself from a distribution point</td>
<td>4%</td>
<td>13%</td>
<td>10%</td>
<td>4%</td>
<td>7%</td>
<td>7%</td>
<td>2%</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Home delivery at daytime</td>
<td>62%</td>
<td>45%</td>
<td>50%</td>
<td>68%</td>
<td>42%</td>
<td>36%</td>
<td>42%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>Home delivery at evening</td>
<td>11%</td>
<td>12%</td>
<td>16%</td>
<td>7%</td>
<td>8%</td>
<td>24%</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Delivery to my workplace</td>
<td>4%</td>
<td>4%</td>
<td>7%</td>
<td>5%</td>
<td>9%</td>
<td>9%</td>
<td>2%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Collected it myself from the online store’s physical store</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>6%</td>
</tr>
<tr>
<td>Collected it myself from a parcel machine</td>
<td>1%</td>
<td>2%</td>
<td>0%</td>
<td>2%</td>
<td>29%</td>
<td>2%</td>
<td>4%</td>
<td>1%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Unsure, don't know</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>
### Detailed Results

#### Returns per product category

**Which types of product have you returned in the past year?**

*(Basis: Entire population, 15-79 years)*

<table>
<thead>
<tr>
<th>Category</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clothing/shoes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>20%</td>
<td>19.5%</td>
<td>32.2%</td>
<td>16.4%</td>
<td>17.5%</td>
<td>19.1%</td>
<td>29.9%</td>
<td>19.1%</td>
<td>25.9%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>91</td>
<td>1.6</td>
<td>41</td>
<td>8.1</td>
<td>3.9</td>
<td>6.8</td>
<td>18.8</td>
<td>8.6</td>
<td>1.4</td>
</tr>
<tr>
<td><strong>Home electronics</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>5.4%</td>
<td>4.4%</td>
<td>7.3%</td>
<td>9.8%</td>
<td>5.3%</td>
<td>9.3%</td>
<td>7.7%</td>
<td>7.6%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>2.4</td>
<td>0.4</td>
<td>0.9</td>
<td>4.8</td>
<td>1.2</td>
<td>3.3</td>
<td>4.8</td>
<td>3.4</td>
<td>0.2</td>
</tr>
<tr>
<td><strong>Books (physical and audiobooks)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>2.2%</td>
<td>1.0%</td>
<td>2.4%</td>
<td>4.8%</td>
<td>1.2%</td>
<td>3.3%</td>
<td>4.8%</td>
<td>3.4%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>1.0</td>
<td>0.1</td>
<td>0.3</td>
<td>1.2</td>
<td>0.4</td>
<td>0.8</td>
<td>1.7</td>
<td>0.6</td>
<td>0.1</td>
</tr>
<tr>
<td><strong>Cosmetics, haircare and skincare</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>1.3%</td>
<td>0.6%</td>
<td>1.6%</td>
<td>1.6%</td>
<td>0.8%</td>
<td>2.5%</td>
<td>14.0%</td>
<td>1.2%</td>
<td></td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>0.6</td>
<td>0.0</td>
<td>0.2</td>
<td>0.8</td>
<td>0.3</td>
<td>0.3</td>
<td>1.6</td>
<td>0.6</td>
<td>0.1</td>
</tr>
<tr>
<td><strong>Home furnishings</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>2.0%</td>
<td>1.6%</td>
<td>2.5%</td>
<td>1.3%</td>
<td>1.9%</td>
<td>2.4%</td>
<td>4.6%</td>
<td>2.4%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>0.9</td>
<td>0.1</td>
<td>0.3</td>
<td>0.6</td>
<td>0.4</td>
<td>0.8</td>
<td>2.9</td>
<td>1.1</td>
<td>0.1</td>
</tr>
<tr>
<td><strong>Movies</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>1.6%</td>
<td>0.6%</td>
<td>1.9%</td>
<td>1.8%</td>
<td>1.7%</td>
<td>1.6%</td>
<td>2.5%</td>
<td>2.8%</td>
<td>15%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>0.7</td>
<td>0.0</td>
<td>0.2</td>
<td>0.9</td>
<td>0.2</td>
<td>0.6</td>
<td>1.6</td>
<td>1.3</td>
<td>0.1</td>
</tr>
<tr>
<td><strong>Sports and leisure products</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>1.7%</td>
<td>1.7%</td>
<td>3.0%</td>
<td>2.6%</td>
<td>1.4%</td>
<td>3.5%</td>
<td>4.3%</td>
<td>2.5%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>0.8</td>
<td>0.1</td>
<td>0.4</td>
<td>1.3</td>
<td>0.3</td>
<td>1.2</td>
<td>2.7</td>
<td>1.1</td>
<td>0.1</td>
</tr>
<tr>
<td><strong>Food</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%</td>
<td>1.0%</td>
<td>0.2%</td>
<td>1.5%</td>
<td>1.1%</td>
<td>0.8%</td>
<td>0.8%</td>
<td>1.3%</td>
<td>1.4%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Millions of consumers</td>
<td>0.4</td>
<td>0.0</td>
<td>0.2</td>
<td>0.6</td>
<td>0.2</td>
<td>0.3</td>
<td>0.8</td>
<td>0.6</td>
<td>0.0</td>
</tr>
</tbody>
</table>

#### How long a delivery time is acceptable?

**When you buy a product online, what are your expectations as to delivery time? What is the maximum number of days it may take to have your product delivered?**

Percentage of e-commerce consumers who consider the following criteria to be very important if they are to shop online.

*(Basis: Have shopped online)*

<table>
<thead>
<tr>
<th>Days</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–2 days</td>
<td>41%</td>
<td>28%</td>
<td>27%</td>
<td>46%</td>
<td>28%</td>
<td>31%</td>
<td>20%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>3–5 days</td>
<td>74%</td>
<td>53%</td>
<td>66%</td>
<td>87%</td>
<td>93%</td>
<td>79%</td>
<td>64%</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>6 days or more</td>
<td>5%</td>
<td>1%</td>
<td>12%</td>
<td>6%</td>
<td>8%</td>
<td>19%</td>
<td>23%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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

**Percentage who responded Yes**

*(Basis: Have shopped online)*

<table>
<thead>
<tr>
<th>Days</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–2 days</td>
<td>41%</td>
<td>14%</td>
<td>24%</td>
<td>37%</td>
<td>46%</td>
<td>38%</td>
<td>28%</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>3–5 days</td>
<td>36%</td>
<td>27%</td>
<td>53%</td>
<td>60%</td>
<td>68%</td>
<td>67%</td>
<td>39%</td>
<td>54%</td>
<td>18%</td>
</tr>
</tbody>
</table>

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

**Percentage who responded Yes**

*(Basis: Have shopped online)*

<table>
<thead>
<tr>
<th>Days</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–2 days</td>
<td>90%</td>
<td>86%</td>
<td>93%</td>
<td>83%</td>
<td>97%</td>
<td>88%</td>
<td>99%</td>
<td>50%</td>
<td>89%</td>
</tr>
<tr>
<td>3–5 days</td>
<td>72%</td>
<td>73%</td>
<td>74%</td>
<td>65%</td>
<td>80%</td>
<td>64%</td>
<td>68%</td>
<td>62%</td>
<td>59%</td>
</tr>
</tbody>
</table>

#### Do you assume that it will be possible to return an item that you bought online?

**Percentage who responded Yes**

*(Basis: Have shopped online)*

<table>
<thead>
<tr>
<th>Days</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–2 days</td>
<td>38%</td>
<td>39%</td>
<td>51%</td>
<td>46%</td>
<td>36%</td>
<td>45%</td>
<td>53%</td>
<td>44%</td>
<td>43%</td>
</tr>
</tbody>
</table>

#### Do you think in general that it is easy to understand the returns procedures for e-retailers?

**Percentage who responded Yes**

*(Basis: Have shopped online)*

<table>
<thead>
<tr>
<th>Days</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl.</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–2 days</td>
<td>10%</td>
<td>25%</td>
<td>33%</td>
<td>19%</td>
<td>23%</td>
<td>21%</td>
<td>19%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>3–5 days</td>
<td>76%</td>
<td>53%</td>
<td>66%</td>
<td>87%</td>
<td>93%</td>
<td>79%</td>
<td>64%</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>6 days or more</td>
<td>5%</td>
<td>12%</td>
<td>12%</td>
<td>6%</td>
<td>8%</td>
<td>19%</td>
<td>23%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>7%</td>
</tr>
</tbody>
</table>
### Proportion who have shopped online via mobile phone or tablet in the past year

<table>
<thead>
<tr>
<th>Country</th>
<th>UK</th>
<th>Belgium</th>
<th>Netherl</th>
<th>Italy</th>
<th>Poland</th>
<th>Spain</th>
<th>Germany</th>
<th>France</th>
<th>Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019 %</td>
<td>65%</td>
<td>54%</td>
<td>61%</td>
<td>76%</td>
<td>62%</td>
<td>77%</td>
<td>58%</td>
<td>60%</td>
<td>66%</td>
</tr>
<tr>
<td>2018 %</td>
<td>65%</td>
<td>46%</td>
<td>58%</td>
<td>66%</td>
<td>53%</td>
<td>71%</td>
<td>56%</td>
<td>57%</td>
<td>63%</td>
</tr>
<tr>
<td>Change in percentage points over the past year</td>
<td>0</td>
<td>8</td>
<td>3</td>
<td>10</td>
<td>5</td>
<td>6</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

### Product categories (returns) cont.

#### CDs

- **UK**: 1.7%, Belgium: 0.5%, Italy: 1.9%, Poland: 1.4%, Spain: 1.5%, Germany: 1.4%, France: 1.9%, Nordic region: 2.3%
- **Millions of consumers**: 0.8

#### Car accessories

- **UK**: 2.0%, Belgium: 1.3%, Italy: 2.8%, Poland: 4.3%, Spain: 4.1%, Germany: 2.4%, France: 2.7%, Nordic region: 2.7%
- **Millions of consumers**: 1.3

#### Toys

- **UK**: 1.6%, Belgium: 1.6%, Italy: 1.9%, Poland: 1.9%, Spain: 10.2%, Germany: 2.7%, France: 2.7%, Nordic region: 1.8%
- **Millions of consumers**: 0.7

#### Children’s items

- **UK**: 3.0%, Belgium: 1.5%, Italy: 2.5%, Poland: 2.5%, Spain: 31%, Germany: 2.4%, France: 3.8%, Nordic region: 6.3%
- **Millions of consumers**: 1.4

### Reasons for shopping from a specific country

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

- **UK**: Amazon (39%), Belgium: Wish (61%), Netherland: Zalando (38%), Italy: Zalando (38%), Poland: Alibaba/Aliexpress (32%), Spain: Amazon (38%), Germany: Amazon (35%), France: Amazon (32%), Nordic region: Amazon (36%)
- **Note**: 37% stated “none of the above”

- **UK**: Amazon (26%), Belgium: Wish (29%), Netherland: Zalando (28%), Italy: Amazon (21%), Poland: Amazon (24%), Spain: Wish (21%), Germany: Amazon (15%), France: Amazon (14%), Nordic region: Amazon (18%)
- **Note**: 36% stated “none of the above”

#### Favorite marketplaces

- **First place**
  - UK: Amazon (87%)
  - Belgium: Zalando (39%)
  - Netherland: Zalando (38%)
  - Italy: Amazon (93%)
  - Poland: Alibaba/Aliexpress (32%)
  - Spain: Amazon (87%)
  - Germany: Amazon (87%)
  - France: Amazon (85%)
  - Nordic region: Amazon (86%)
- **Second place**
  - UK: Amazon (87%)
  - Belgium: Alibaba/Aliexpress (27%)
  - Netherland: eBay (32%)
  - Italy: eBay (42%)
  - Poland: eBay (35%)
  - Spain: eBay (35%)
  - Germany: eBay (35%)
  - France: eBay (35%)
  - Nordic region: eBay (35%)
- **Third place**
  - UK: Wish (52%)
  - Belgium: Amazon (17%)
  - Netherland: Wish (44%)
  - Italy: Zalando (31%)
  - Poland: Alibaba/Aliexpress (23%)
  - Spain: Amazon (38%)
  - Germany: Zalando (26%)
  - France: Wish (23%)
  - Nordic region: Wish (22%)
- **Fourth place**
  - UK: eBay (17%)
  - Belgium: Wish (34%)
  - Netherland: Amazon (19%)
  - Italy: Wish (27%)
  - Poland: Amazon (15%)
  - Spain: Wish (25%)
  - Germany: Zalando (22%)
  - France: Wish (15%)
  - Nordic region: Amazon (18%)

#### Favorite countries

- **First place**
  - USA (18%)
  - China (17%)
  - Germany (21%)
  - UK (19%)
  - France (19%)
  - Nordic region: USA (19%)
- **Second place**
  - USA (18%)
  - China (17%)
  - Germany (21%)
  - UK (19%)
  - France (19%)
  - Nordic region: USA (19%)
- **Third place**
  - Germany (18%)
  - USA (15%)
  - Germany (27%)
  - UK (17%)
  - USA (14%)
  - France (13%)
  - Nordic region: USA (13%)
- **Fourth place**
  - Spain (5%)
  - UK (10%)
  - UK (10%)
  - USA (14%)
  - USA (10%)
  - France (13%)
  - Nordic region: USA (13%)

### Percentage who purchased products online from the following market platforms

#### Why have you shopped online from the countries you have chosen? (Basis: Have shopped online)

- **UK**: Amazon (39%), Belgium: Wish (61%), Netherland: Zalando (38%), Italy: Zalando (38%), Poland: Alibaba/Aliexpress (32%), Spain: Amazon (38%), Germany: Amazon (35%), France: Amazon (32%), Nordic region: Amazon (36%)
- **Note**: 37% stated “none of the above”

- **UK**: Amazon (26%), Belgium: Wish (29%), Netherland: Zalando (28%), Italy: Amazon (21%), Poland: Amazon (24%), Spain: Wish (21%), Germany: Amazon (15%), France: Amazon (14%), Nordic region: Amazon (18%)
- **Note**: 36% stated “none of the above”

#### Favorite marketplaces

- **First place**
  - UK: Amazon (87%)
  - Belgium: Zalando (39%)
  - Netherland: Zalando (38%)
  - Italy: Amazon (93%)
  - Poland: Alibaba/Aliexpress (32%)
  - Spain: Amazon (87%)
  - Germany: Amazon (87%)
  - France: Amazon (85%)
  - Nordic region: Amazon (86%)
- **Second place**
  - UK: Amazon (87%)
  - Belgium: Alibaba/Aliexpress (27%)
  - Netherland: eBay (32%)
  - Italy: eBay (42%)
  - Poland: eBay (35%)
  - Spain: eBay (35%)
  - Germany: eBay (35%)
  - France: eBay (35%)
  - Nordic region: eBay (35%)
- **Third place**
  - UK: Wish (52%)
  - Belgium: Amazon (17%)
  - Netherland: Wish (44%)
  - Italy: Zalando (31%)
  - Poland: Alibaba/Aliexpress (23%)
  - Spain: Amazon (38%)
  - Germany: Zalando (26%)
  - France: Wish (23%)
  - Nordic region: Wish (22%)
- **Fourth place**
  - UK: eBay (17%)
  - Belgium: Wish (34%)
  - Netherland: Amazon (19%)
  - Italy: Wish (27%)
  - Poland: Amazon (15%)
  - Spain: Wish (25%)
  - Germany: Zalando (22%)
  - France: Wish (15%)
  - Nordic region: Amazon (18%)

#### Favorite countries

- **First place**
  - USA (18%)
  - China (17%)
  - Germany (21%)
  - UK (19%)
  - France (19%)
  - Nordic region: USA (19%)
- **Second place**
  - USA (18%)
  - China (17%)
  - Germany (21%)
  - UK (19%)
  - France (19%)
  - Nordic region: USA (19%)
- **Third place**
  - Germany (18%)
  - USA (15%)
  - Germany (27%)
  - UK (17%)
  - USA (14%)
  - France (13%)
  - Nordic region: USA (13%)
- **Fourth place**
  - Spain (5%)
  - UK (10%)
  - UK (10%)
  - USA (14%)
  - USA (10%)
  - France (13%)
  - Nordic region: USA (13%)
E-commerce in Europe 2019

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 UK and the US. 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 both within and across the Nordic region. In 2018, we had around 30,000 employees and sales of just over SEK 38 billion. PostNord has a comprehensive offering for e-commerce, with a range of services in the areas of customer communications and logistics.

We have a harmonized, Nordic logistics service offering, ranging from retail suppliers 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 more than 7,000 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.

Read more at www.postnord.com and www.directlink.com

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