

# E-commerce in Europe 2019

**Digital marketplaces gain increasing influence**

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## About this report

**PostNord has studied** the European e-commerce market in the E-commerce in Europe 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.

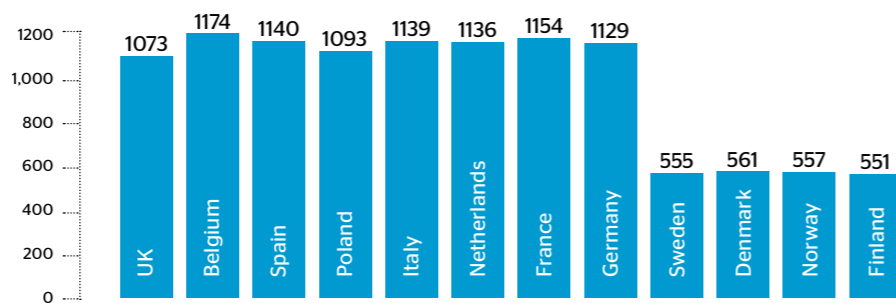
The report presents the aggregate findings for the Nordic region. The Nordic region refers to Sweden, Denmark, Norway

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.

NUMBER OF RESPONDENTS IN EACH COUNTRY



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

**P**ostNord 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 in to 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.

Here 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 organizations 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, from and 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

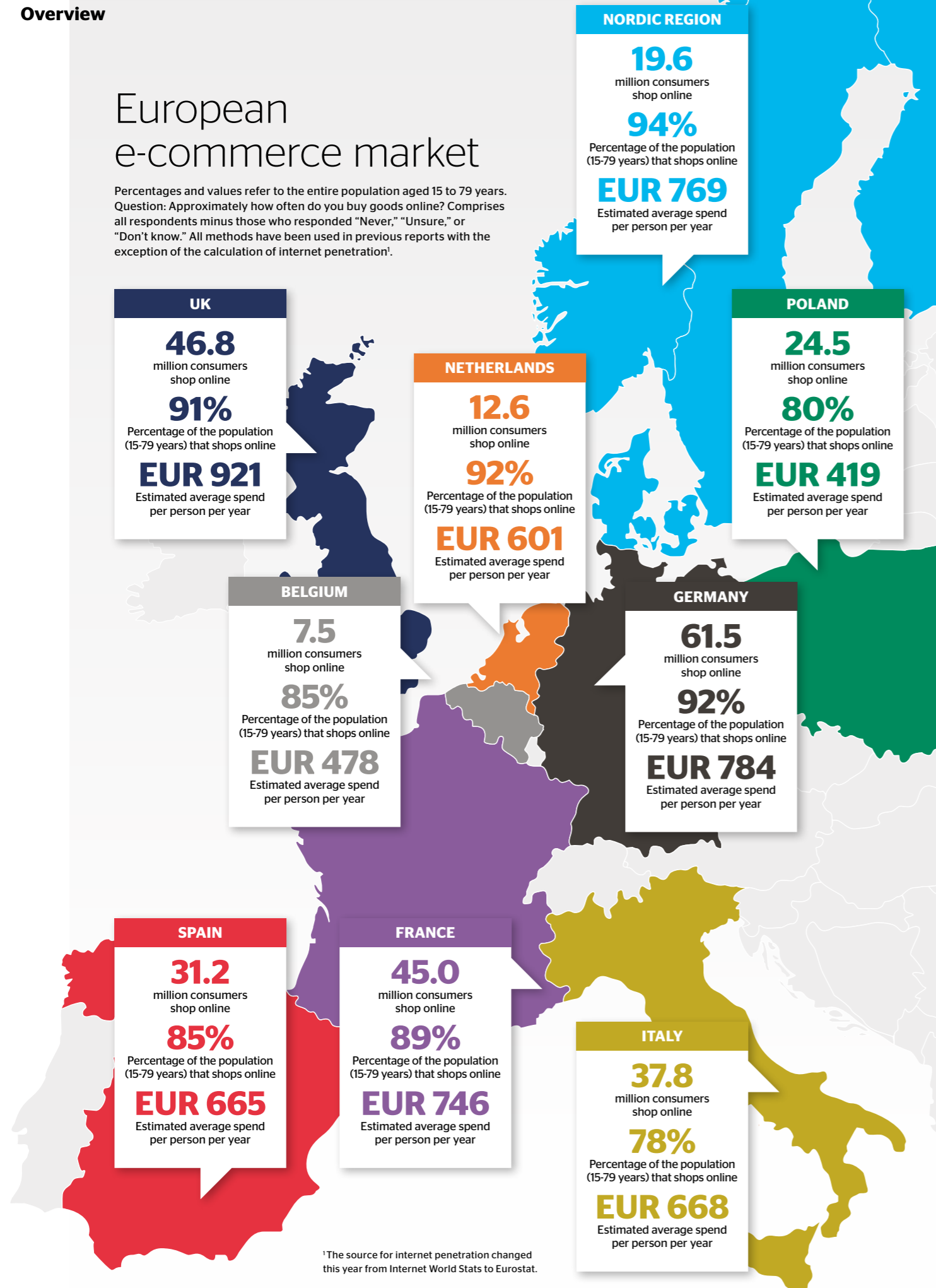


“A growing number of companies are coming to us because they want to enter Europe, and more and more e-retailers that are already here are taking the step beyond the borders of their own countries.”

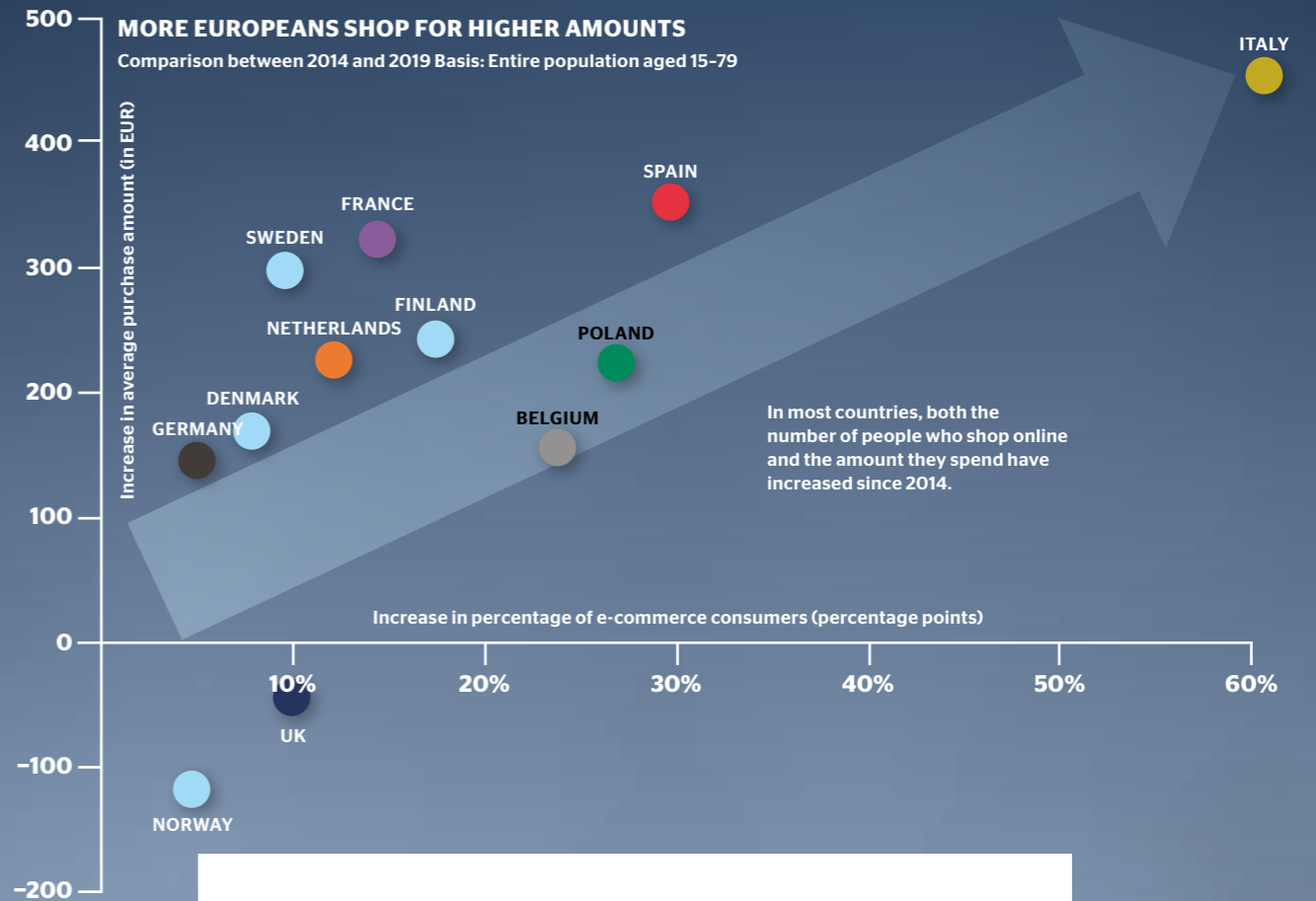


# European e-commerce market

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<sup>1</sup>.



<sup>1</sup>The source for internet penetration changed this year from Internet World Stats to Eurostat.



## Europe - a continent in change

Since **E-commerce in Europe** was published for the first time in 2014, major changes have occurred in the European e-commerce market. The number of consumers who shop online has steadily increased, especially in Italy, Spain, Poland and Belgium. The average amount for each online purchase has also increased as consumers buy more types of products online and do so more frequently.

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.



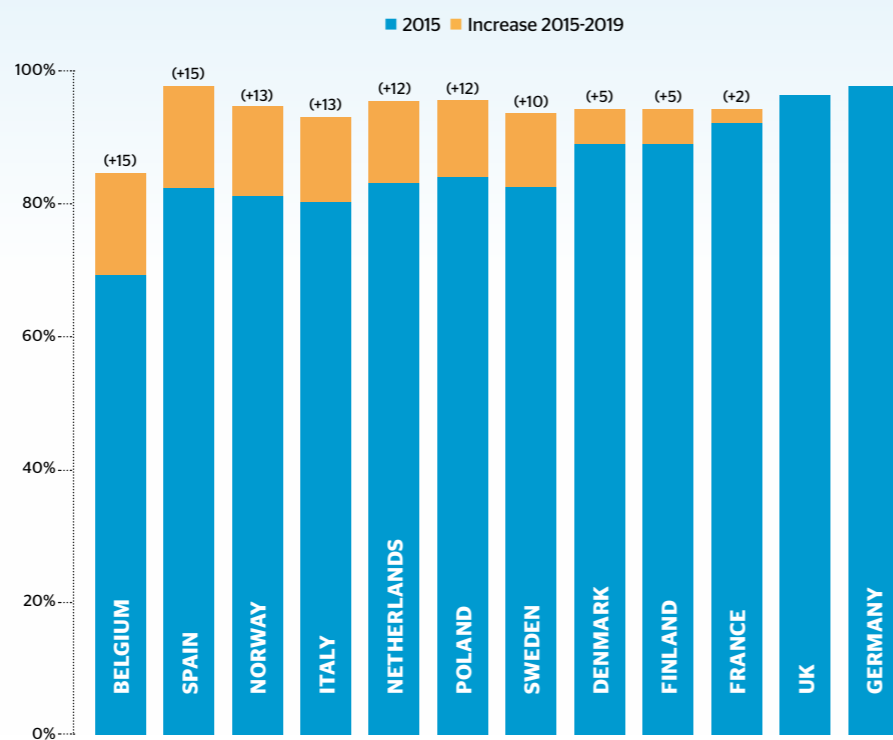
## A growing number of older individuals shop online

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

Percentage of individuals aged 65-79 who shopped online at any time. The difference in percentage points between 2015 and 2019 is shown in parentheses. Basis: Use the internet.



Arne Andersson.

## 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.



Olof Källgren.

### 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 7.5 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.

### 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.

### 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.

### 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

the opportunity to shop directly in social media.

### 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.

### 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.



## 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.

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

Did you know that...

# 286

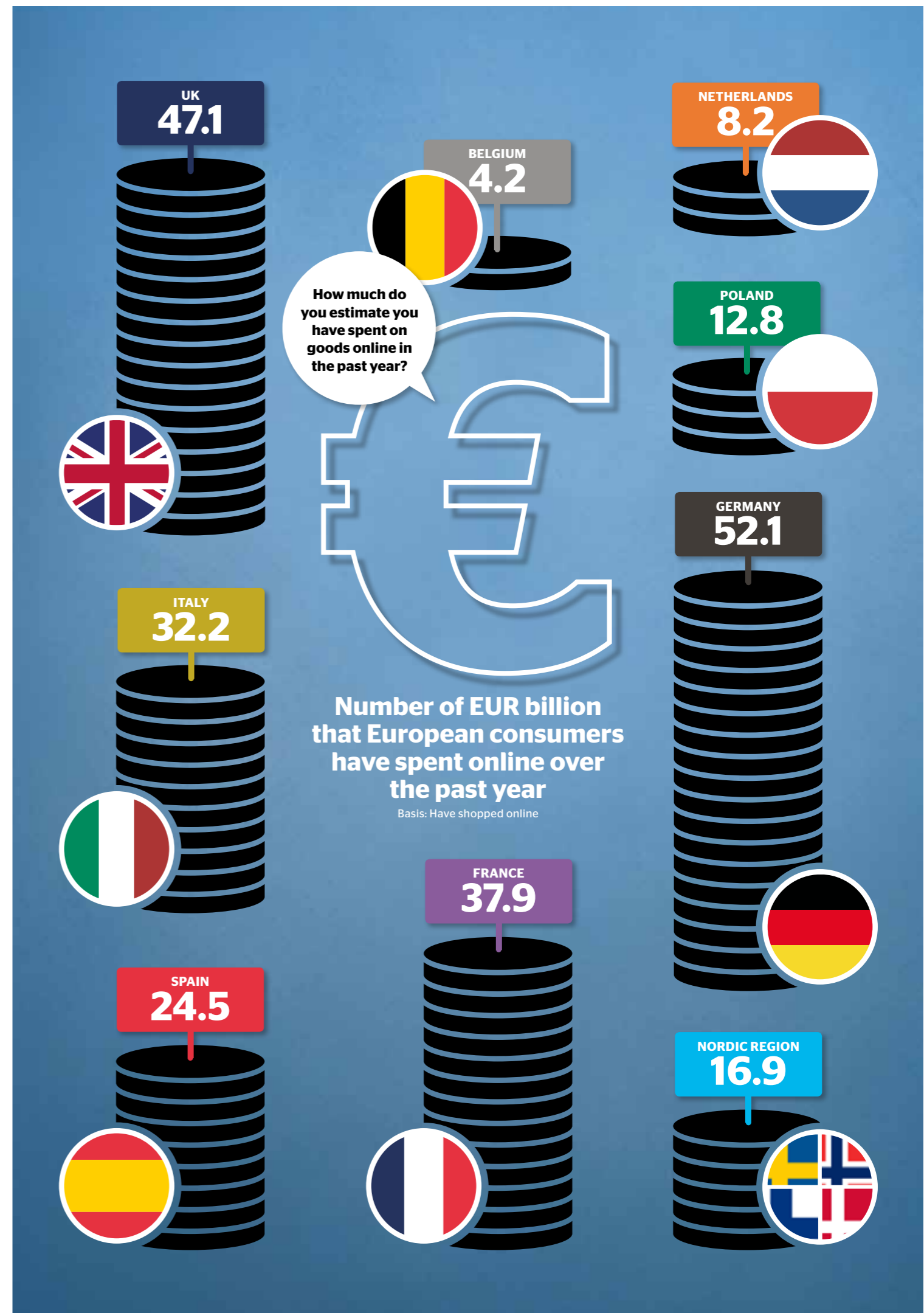
million consumers in Europe shop online

# 235

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

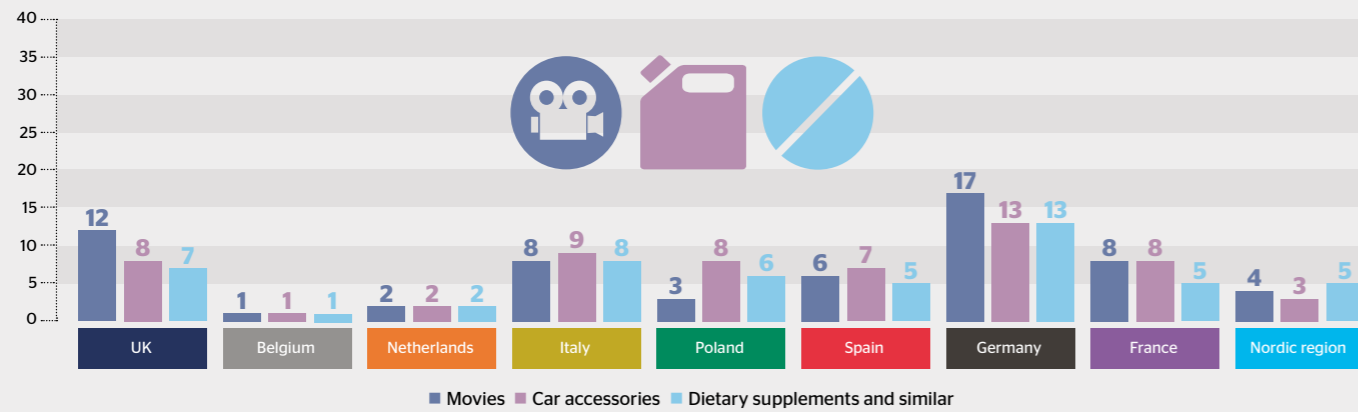
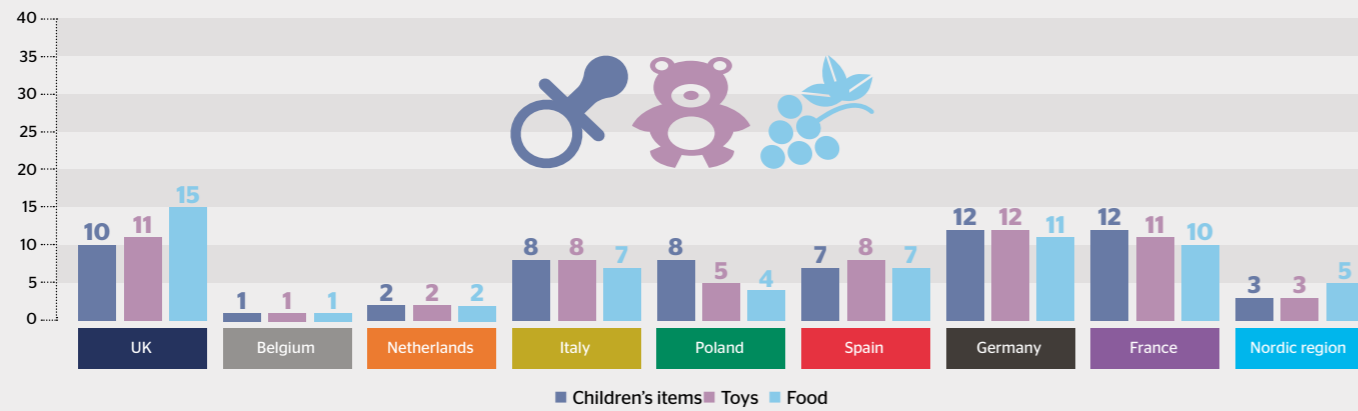
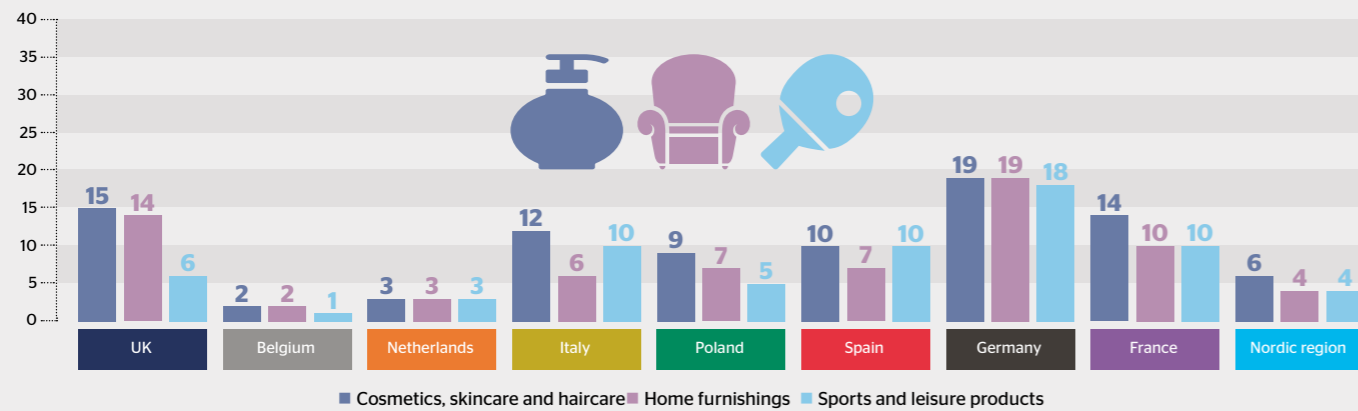
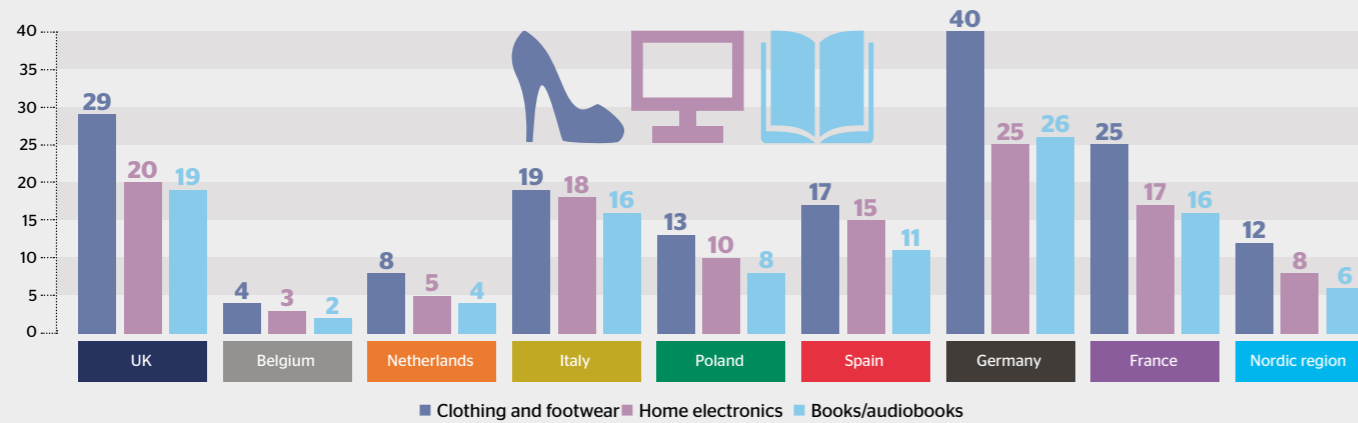
# 217

million European consumers make online purchases from abroad



## Top product categories among European online shoppers

(millions of consumers)



Number of consumers in millions who have shopped online in each category over the past year. Question: What types of products have you bought online in the past year? Basis: Have shopped online. For more detailed information, see detailed results on pages 47-48.

## 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.

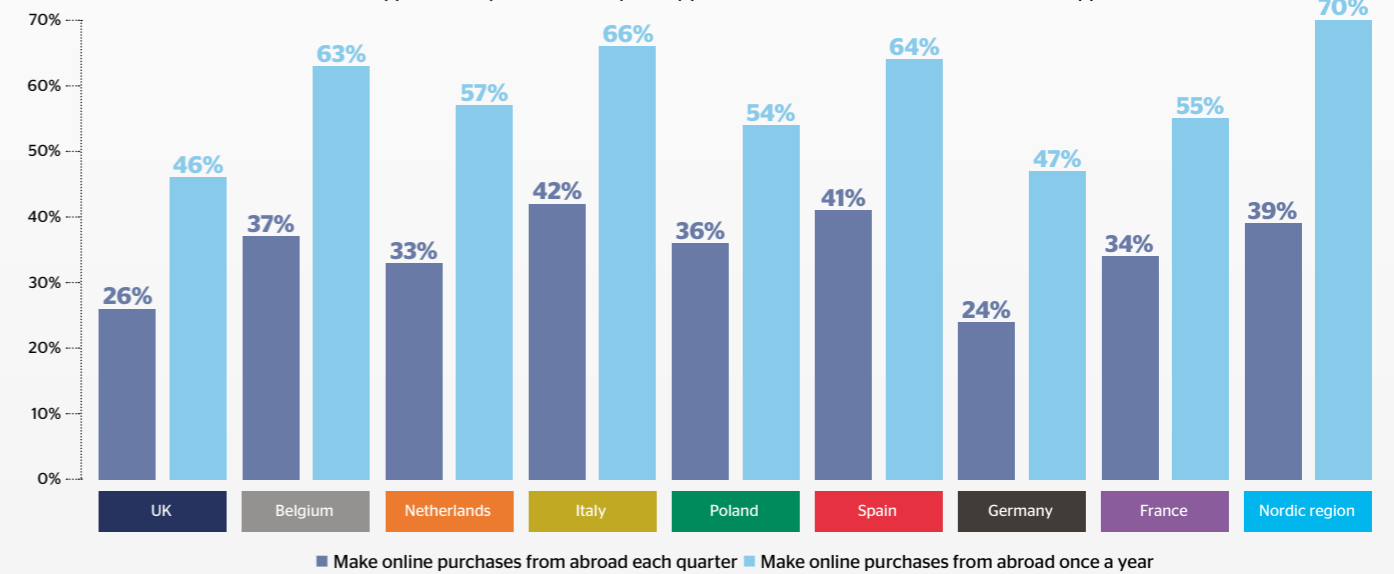
Low prices appear to be important regardless of how developed e-commerce is in a country. In both the well-developed UK and fast-growing Poland, low prices are essentially equally important.

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.

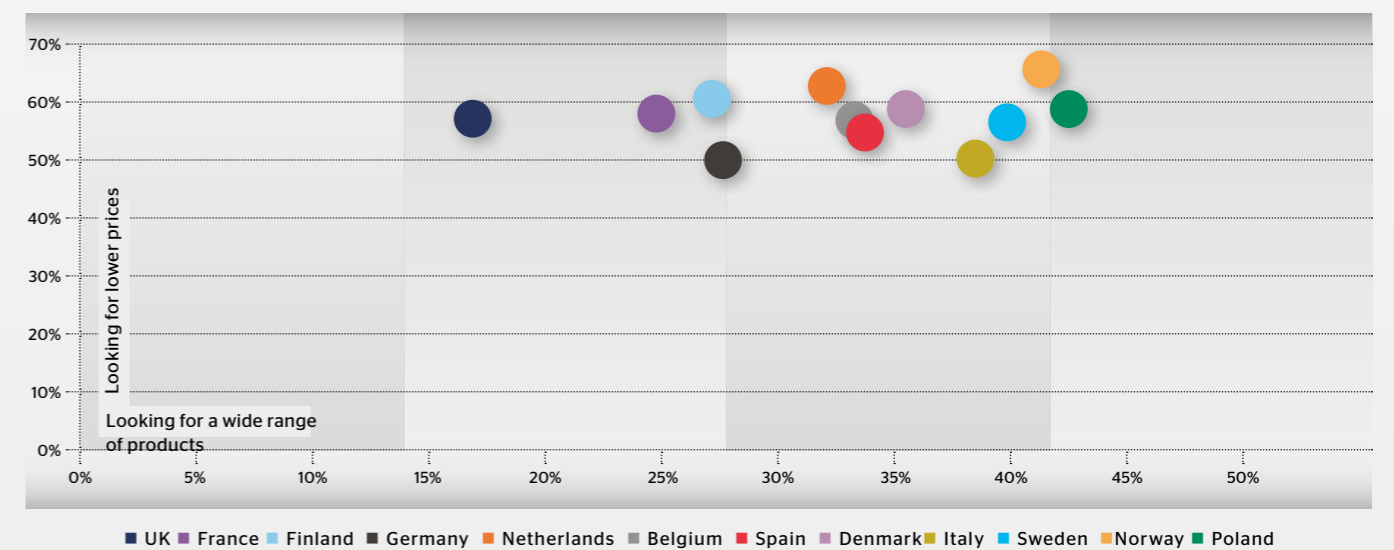
### How common is shopping online from abroad?

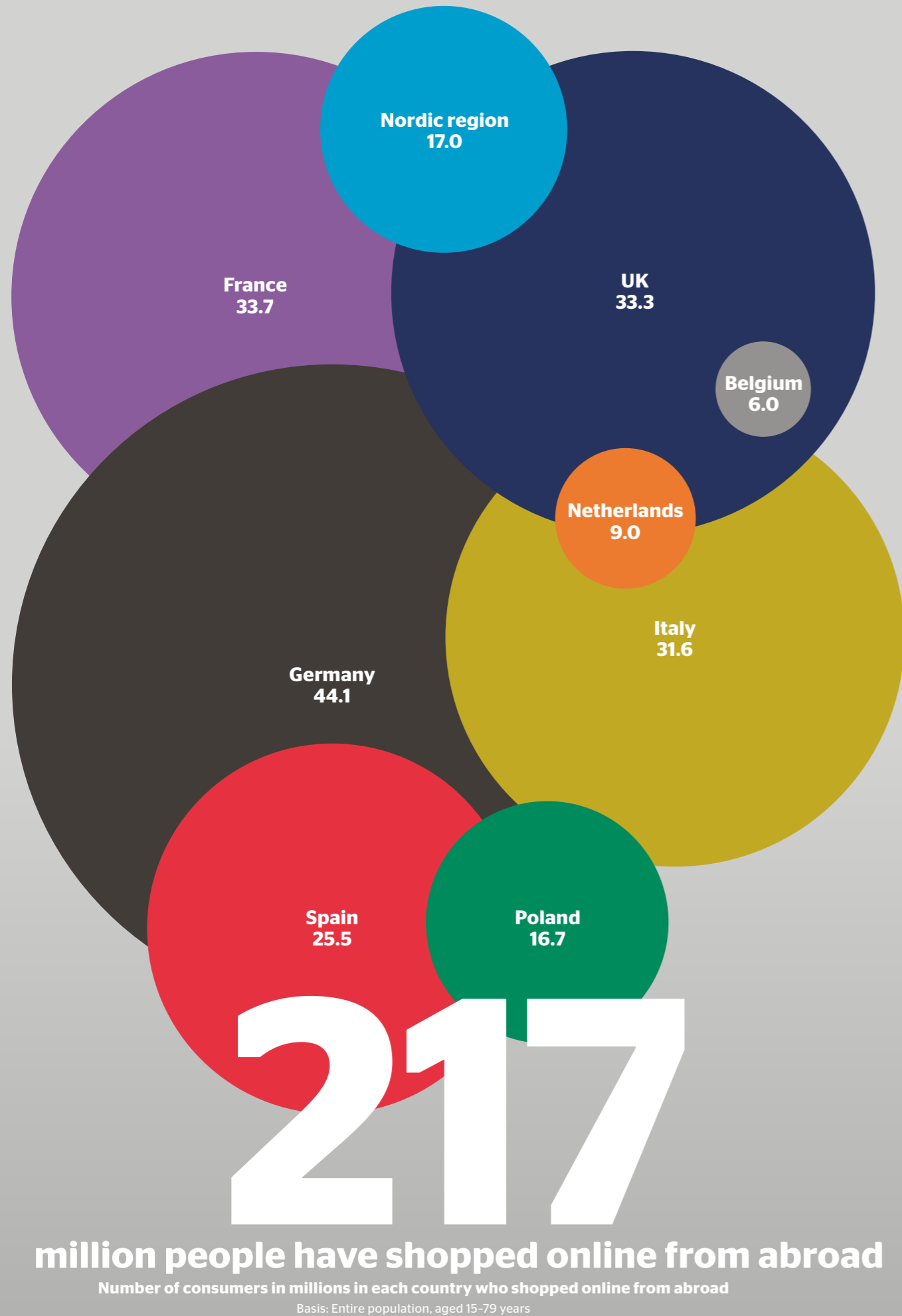
Question: Approximately how often do you buy products online from abroad? Basis: Have shopped online.



### Low prices are always important

The diagram shows that low prices are an important reason for shopping from abroad. However, a large range of products is a driving force that varies from country to country. Question: Why have you purchased products from abroad? Basis: Have shopped online from abroad.



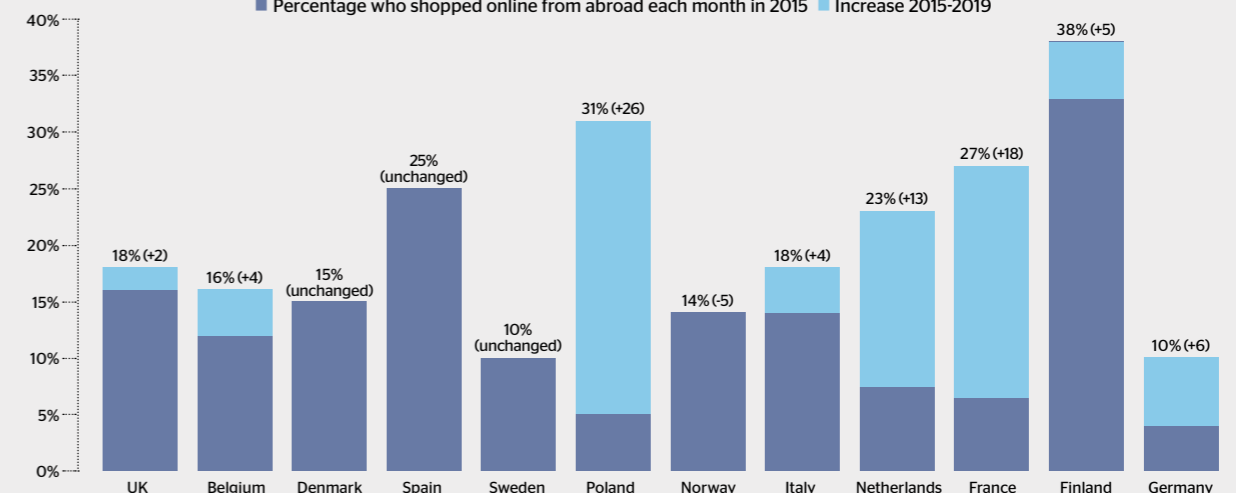


### Young people shop from abroad more often

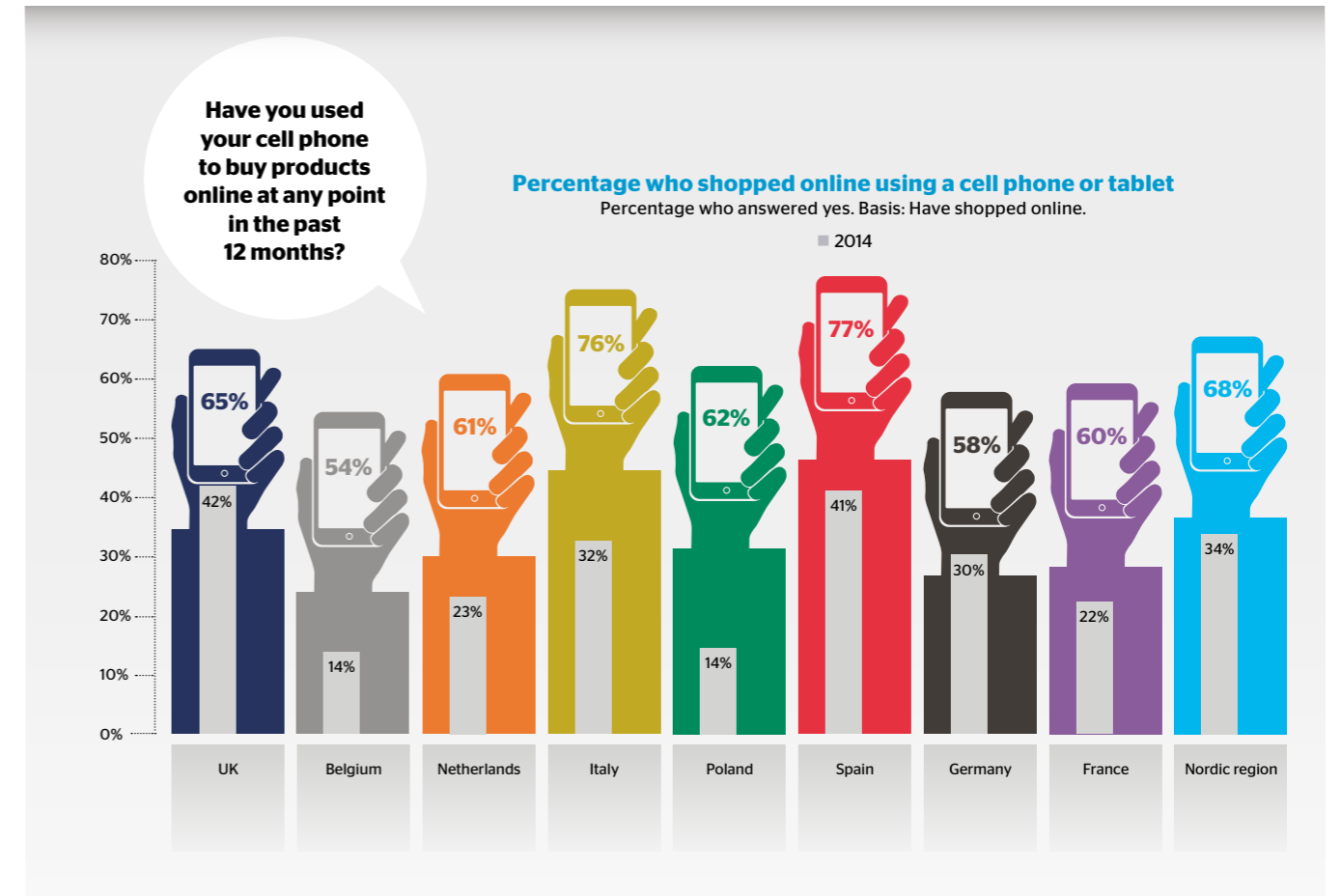
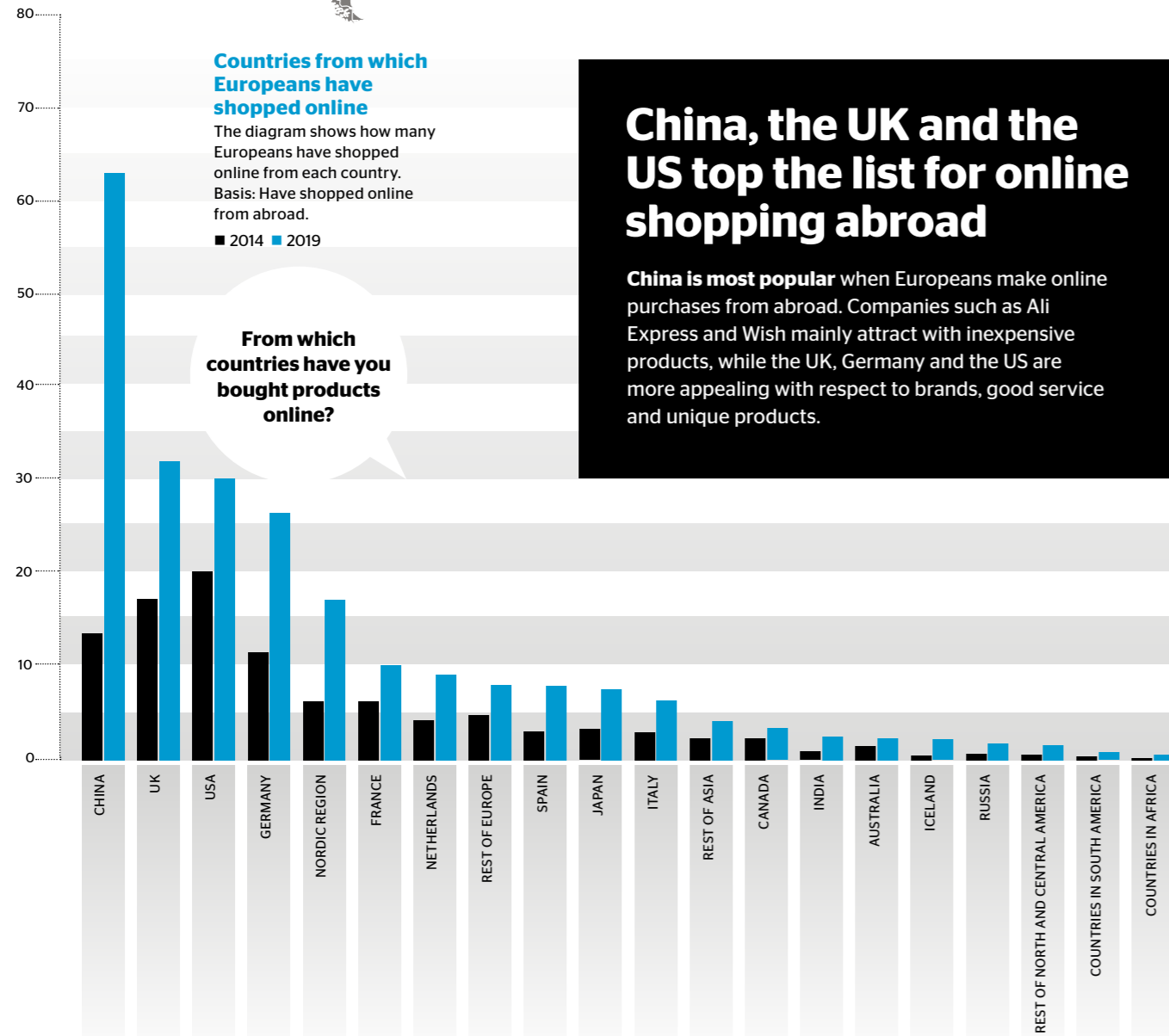
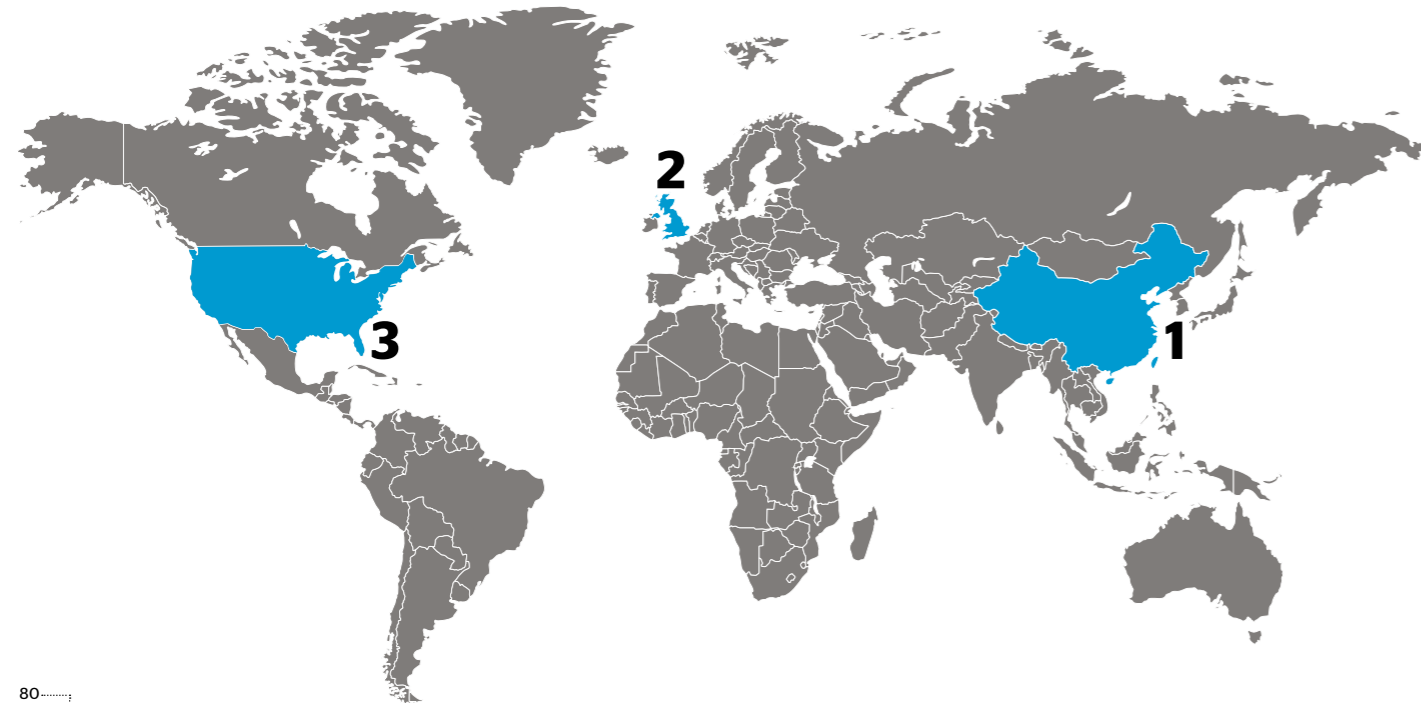
**Young consumers** are often at the forefront of new trends, and e-commerce from abroad is no exception. In many of the countries more than one in four young consumers state that they make online purchases from abroad at least once a month. The largest increase in recent years has occurred in Poland.

#### 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





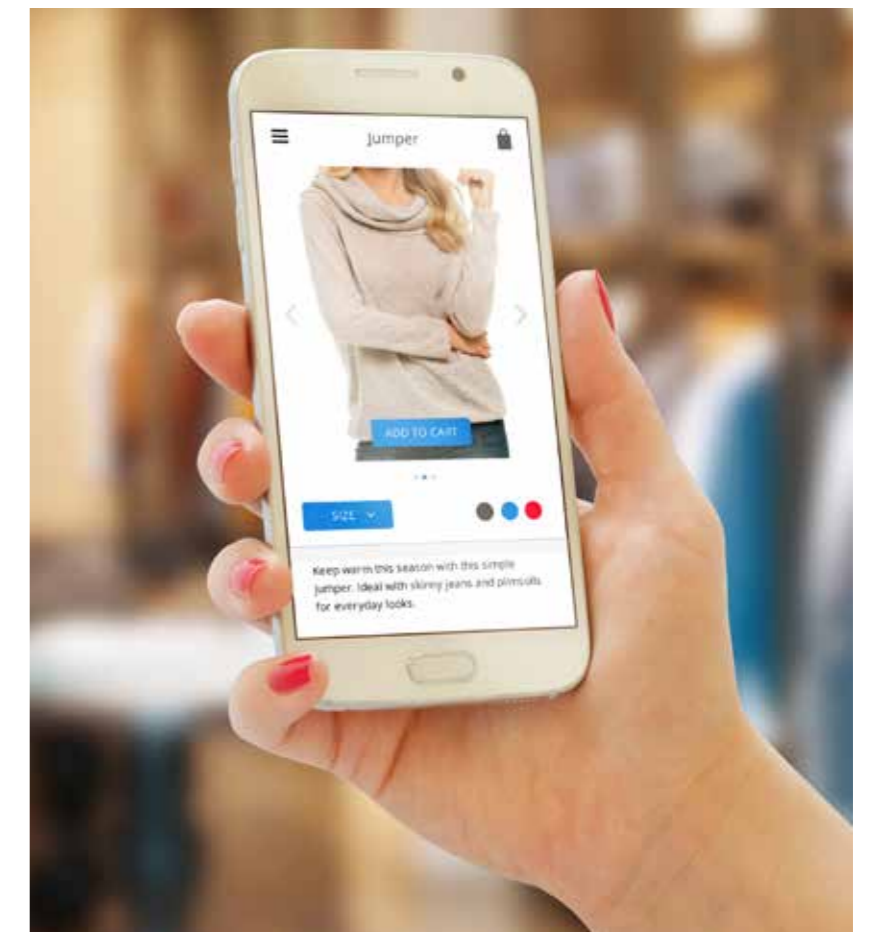


### E-commerce using the cell phone is skyrocketing

**Today, using mobile devices for shopping** is a given. In five years, the percentage of European consumers who used a cell phones 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.

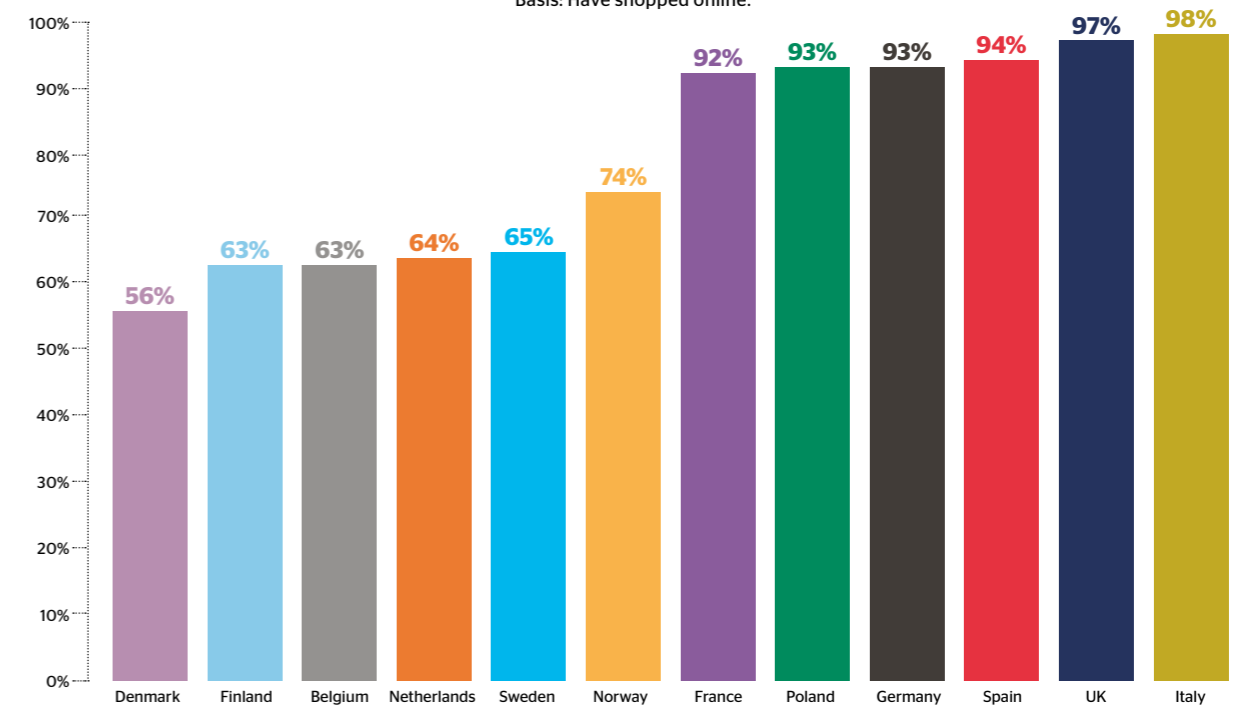
International marketplaces are common in large countries, and less common in small countries. The explanation is Amazon, which has deliberately focused on the largest markets in Europe.

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.

### Percentage who shopped online from marketplaces in the past year

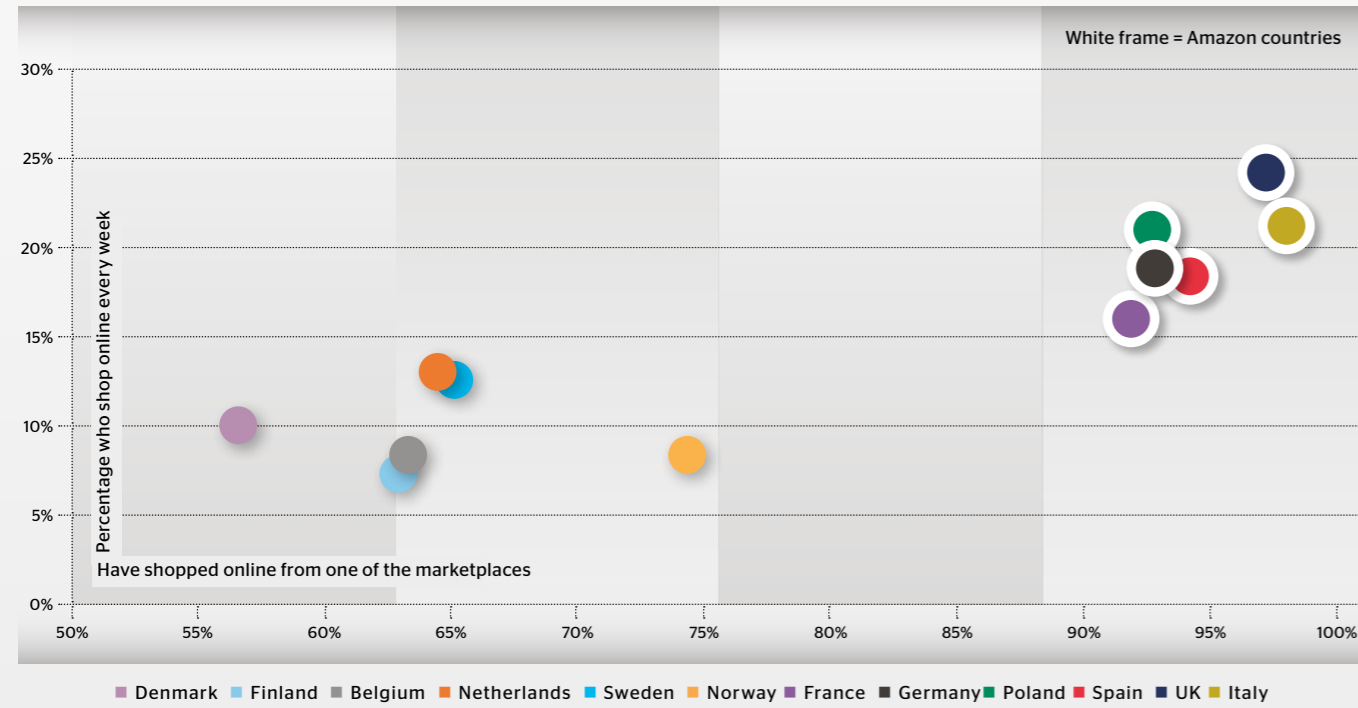
The term "marketplaces" refers to Amazon, Wish, eBay, Zalando, Etzy, Alibaba, JD, or Allegro.

Basis: Have shopped online.



**Marketplaces are most popular where Amazon has a presence**

The diagram shows that marketplaces are most popular in France, Germany, Spain, the UK and Italy, and Amazon has a presence in all of these countries. Poland is the exception that confirms the rule - here e-commerce is dominated by domestic Allegro. Basis: All respondents (y axis) vs "Have shopped online" (x axis). The term "international marketplaces" refers to Amazon, Wish, eBay, Zalando, Etzy, Alibaba, JD, or Allegro.



Wish is relatively popular in most countries, but does not have a strong position in any country. Norwegians and Swedes shop most from Wish.

**Amazon and Wish have different strategies in Europe**

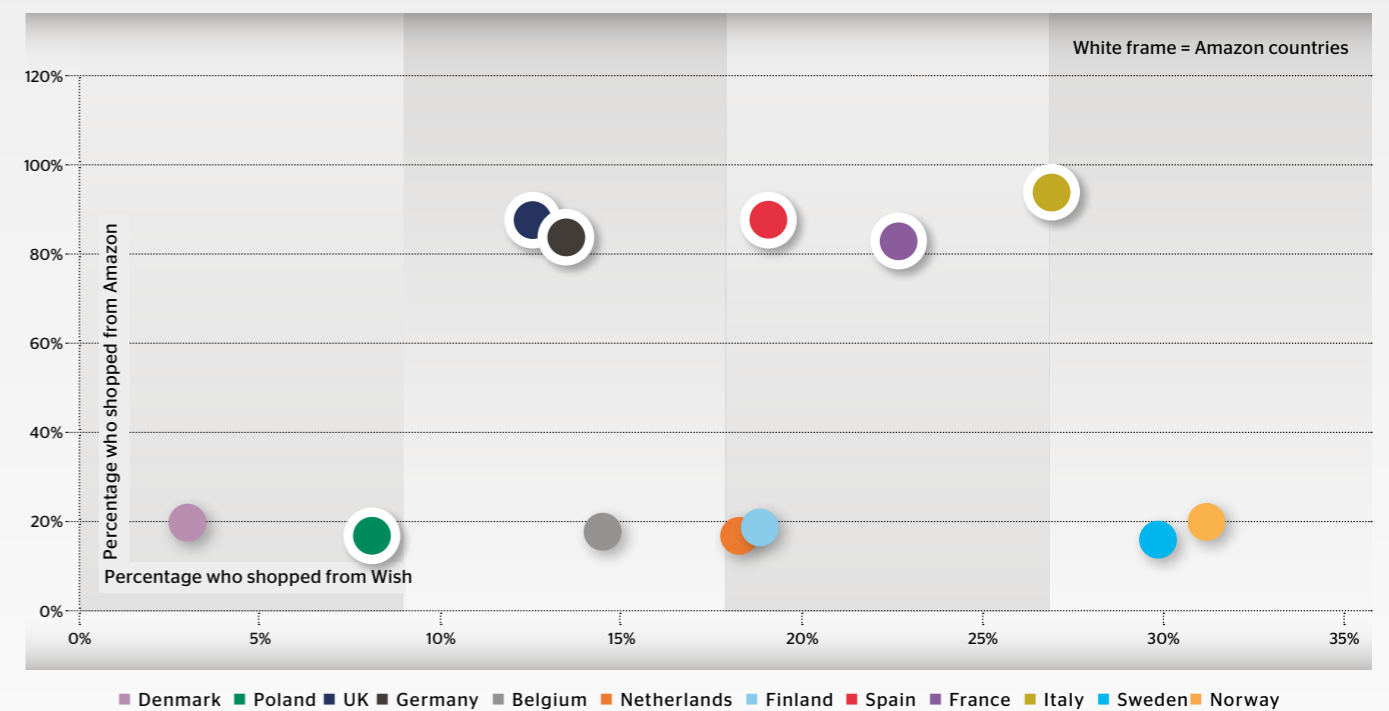
The international marketplaces appear to have different strategies in Europe. This is clarified by a comparison between Amazon, based in the US, and Wish, based in China. Amazon is strong in a few markets, while Wish has small market shares in many countries. The diagram below shows loyalty to Amazon 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.

Which of the following e-commerce sites have you shopped from in the last 12 months?

**Amazon is strong in a few markets, Wish has small market shares in many countries**

Basis: Have shopped online.



**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.





## Mature markets take fast and flexible deliveries for granted

**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.



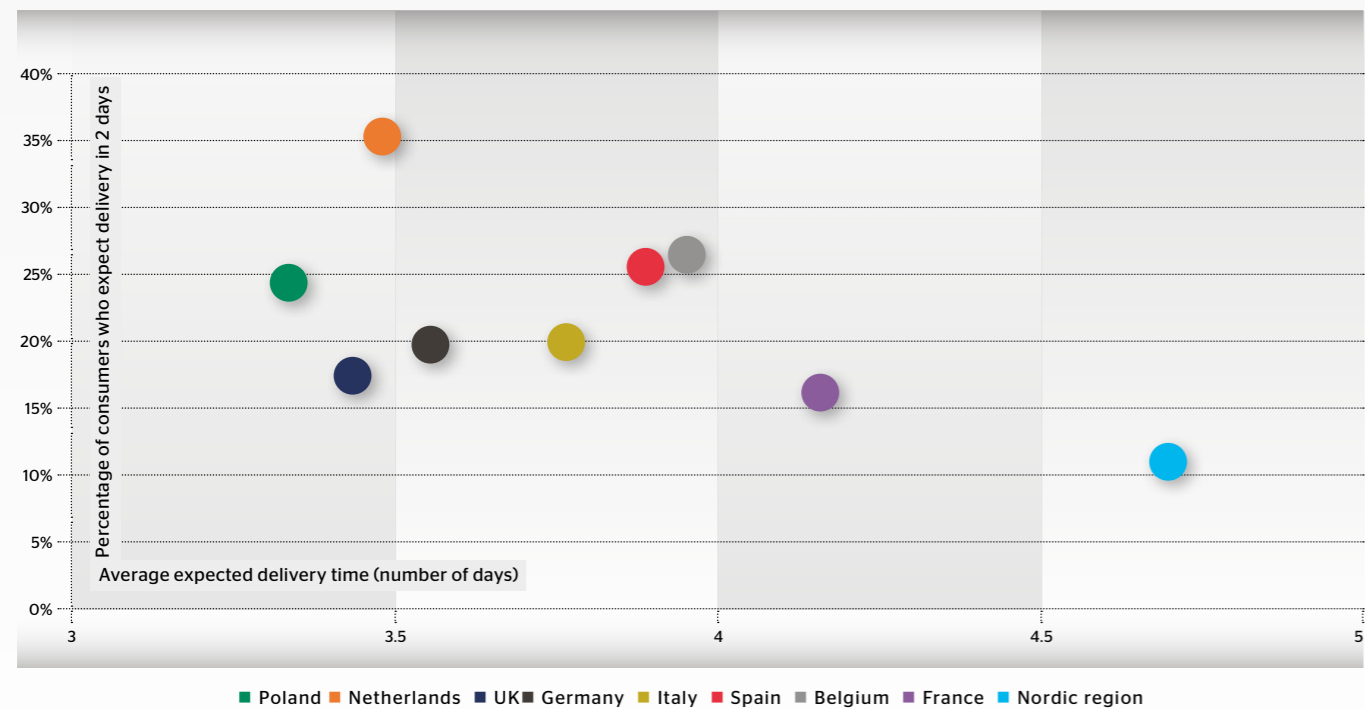
Did you know that...

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.

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?

### Delivery expectations in different countries

Respondents who answered "don't know" have not been included  
Basis: Have shopped online.



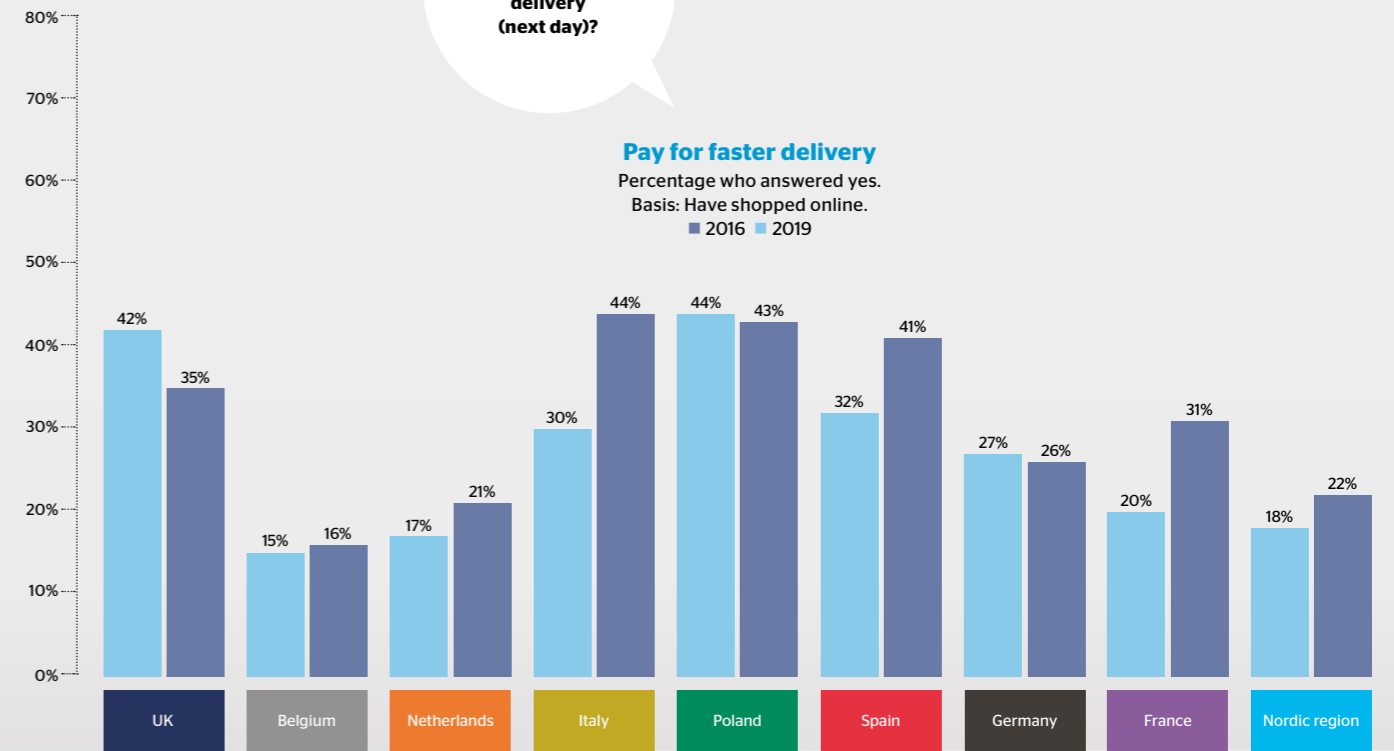
When you order a product online, how do you prefer to have it delivered?

Basis: Have shopped online.

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



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

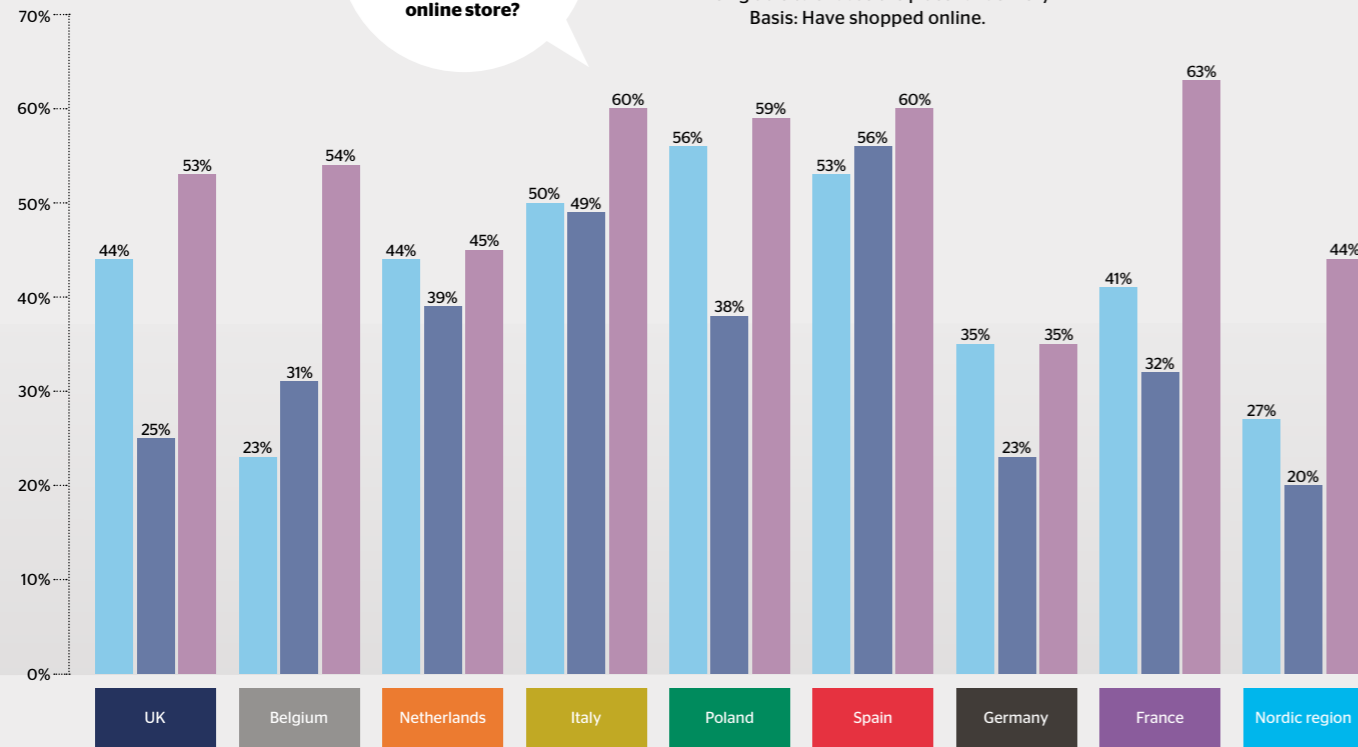


How important are the following factors regarding delivery in your decision to buy goods from an online store?

**Speed and freedom of choice most important for delivery**

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

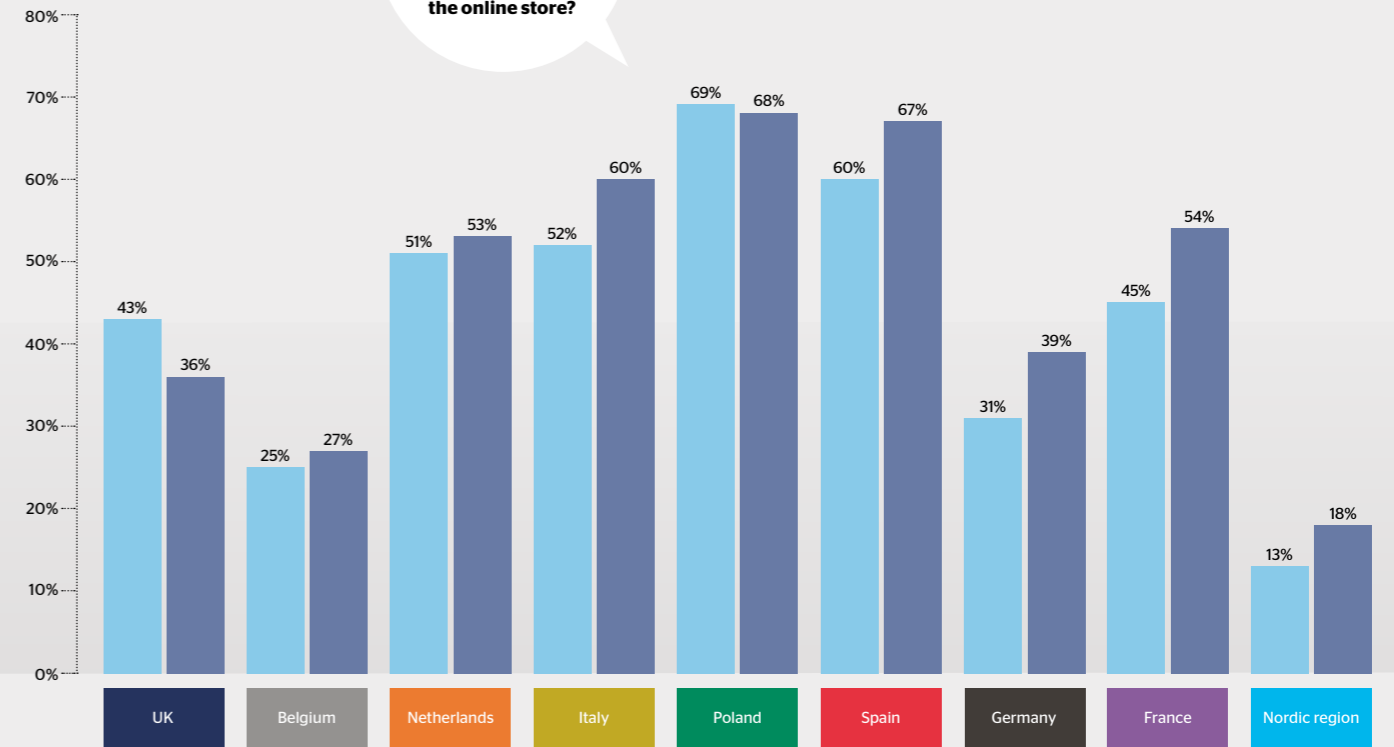
Basis: Have shopped online.



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

**Option to change time of delivery**

Percentage who answered yes. Basis: Have shopped online.





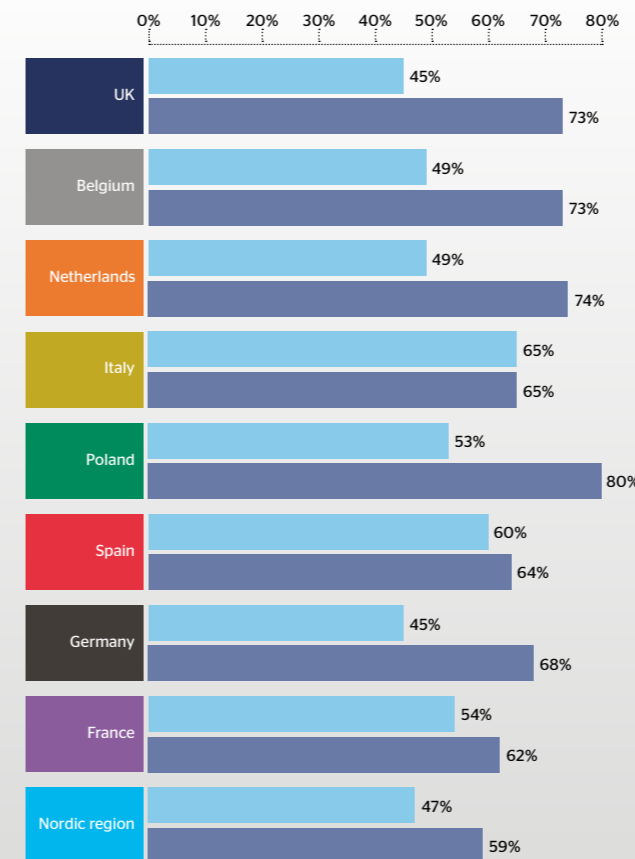
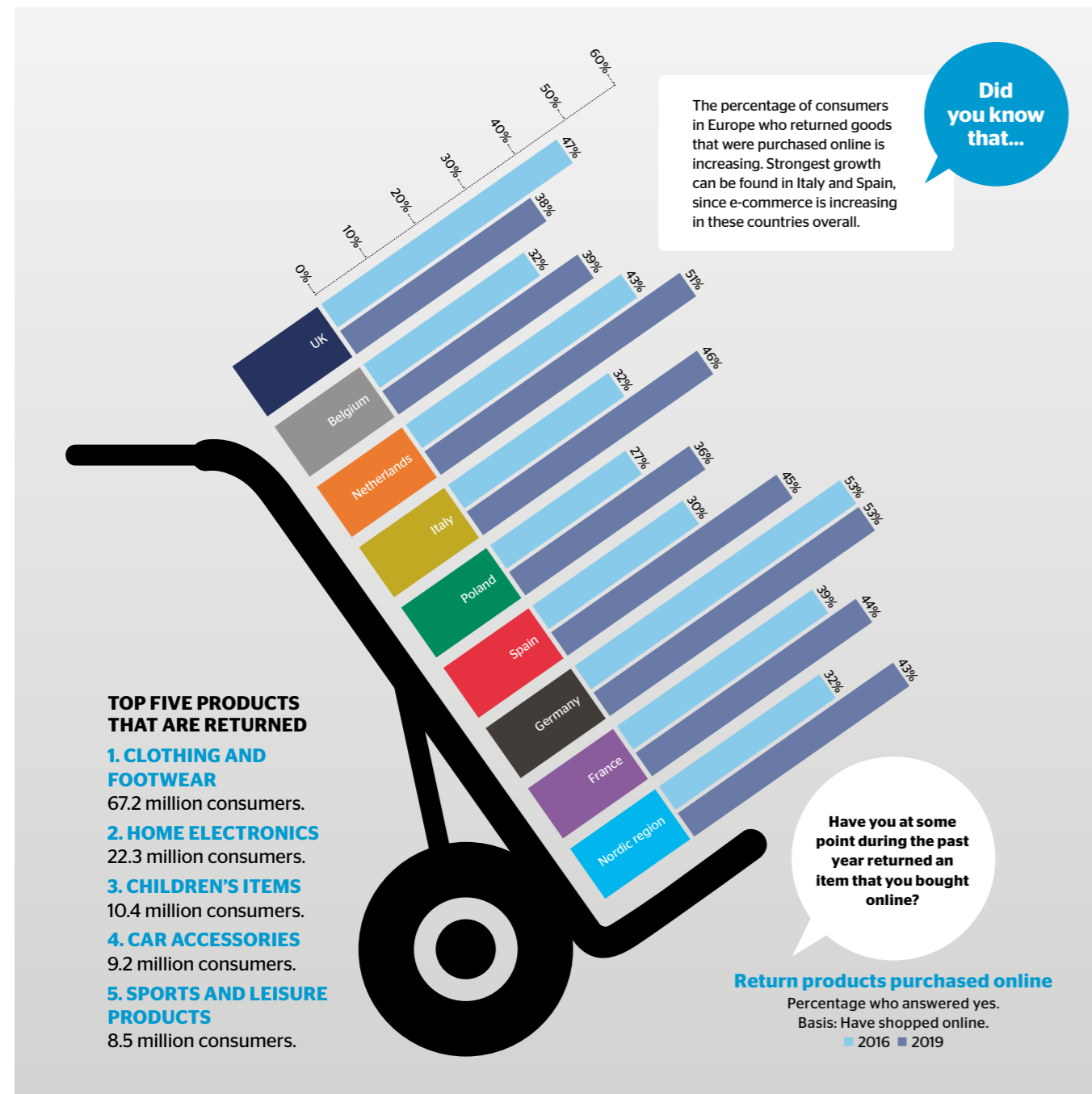
## Returns - a double-edged sword

**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 A.I. will help consumers find the right size and fit for clothing. This approach will reduce both returns and end-of-season sales, which together will result in better 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? Percentage of consumers who regard this factor as "very important" Basis: Have shopped online.

In general, do you think that it is easy to understand the procedures for returns on the websites of online stores? Percentage who answered Yes. Basis: Have shopped online.

## More payment solutions result in better business

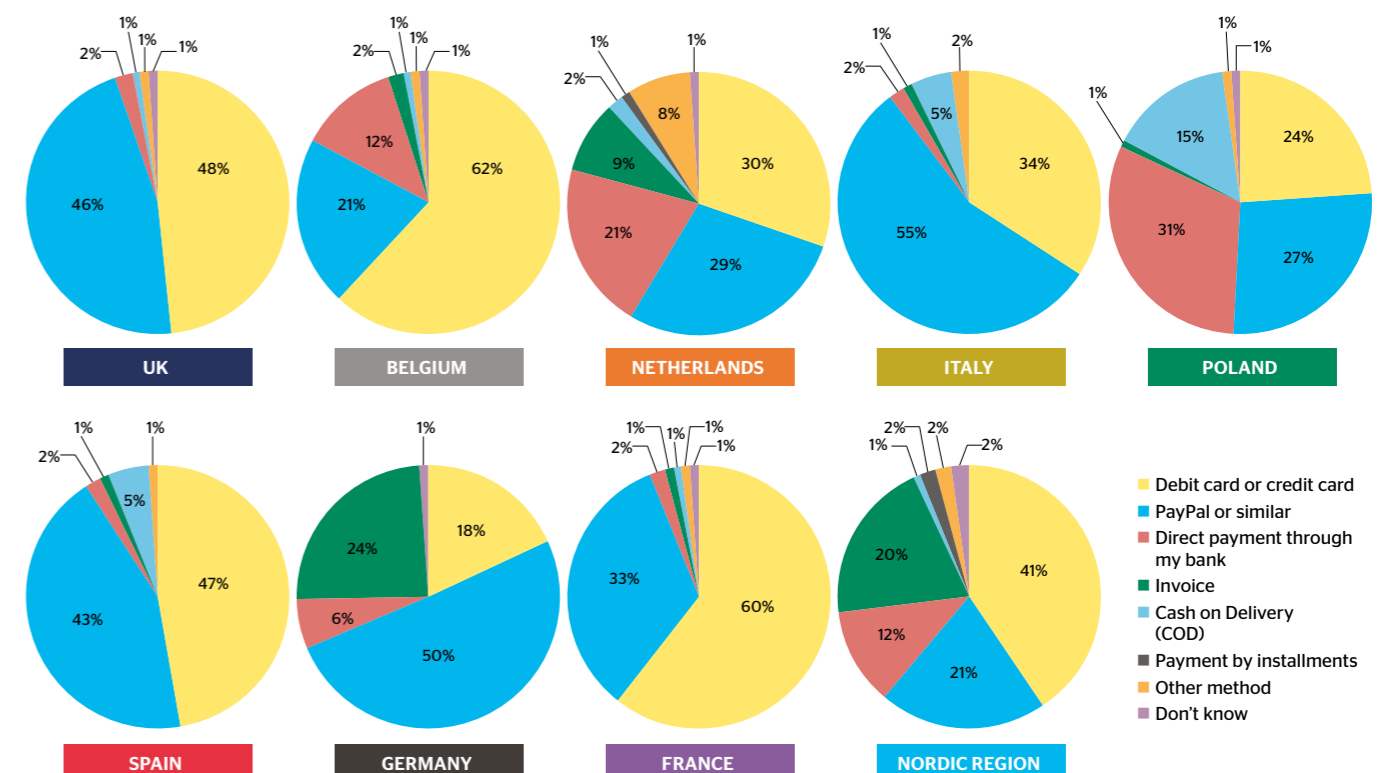
**In many ways,** e-commerce in the European countries is becoming more standardized, but there are major differences regarding payment methods.

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 (APA) 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 Klarna are in a growth phase. Chinese WeChatPay 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? Basis: Have shopped online





# “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

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

**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 here,” 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 to

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



“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.**

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 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.





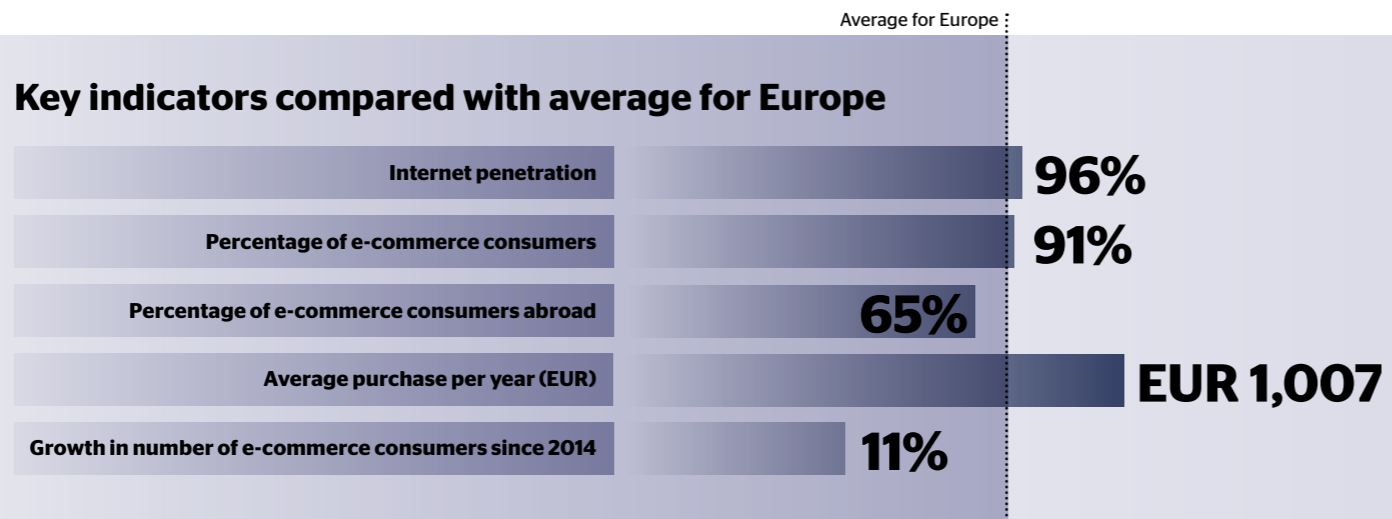
**Did you know that...**  
 The population of the UK has increased by more than three million since 2014.

## 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 complicate e-commerce.



## 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 87 percent of e-commerce consumers have shopped in the past year. But eBay also has a strong position in the country.

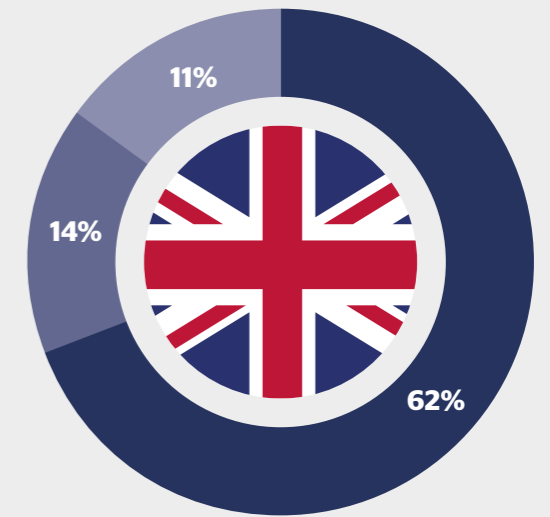
The British market is large and has many consumers who are accustomed to online shopping. This makes it an excellent destination for e-retailers from other countries who want to try to export somewhat unique and niche products.

## 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.

## Spotlight on: UK



### Top three preferred delivery methods

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

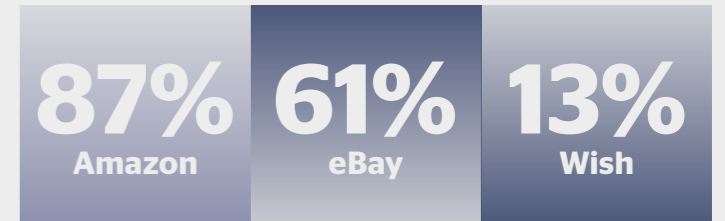
Basis: Have shopped online

■ Home delivery in daytime ■ In mailbox ■ Home delivery in evening

### Top three international marketplaces

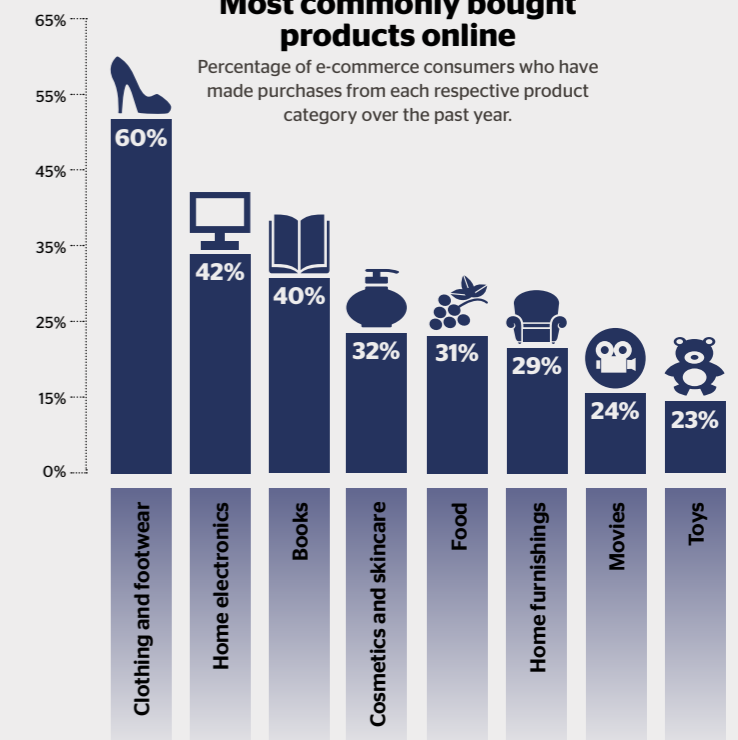
From which of the following e-commerce sites have you shopped online in the past year?

Basis: Have shopped online



### Most commonly bought products online

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





**Did you know that...**

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

## 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.

### Key indicators compared with average for Europe

Indicator	Value	Average for Europe
Internet penetration	91%	
Percentage of e-commerce consumers	85%	
Percentage of e-commerce consumers abroad	68%	
Average purchase per year (EUR)	EUR 560	
Growth in number of e-commerce consumers since 2014	24%	

## Large potential for new market participants

**Belgium should be** of great interest to e-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.

## 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.

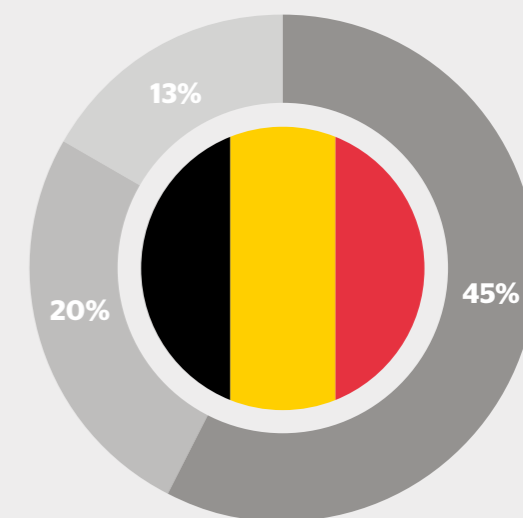
One thing that stands out is that Alibaba is larger on the Belgian market than Amazon, at least regarding the percentage of consumers who have shopped from each site. In all, 21 percent have made purchases from Alibaba during the past year, compared with 17 percent from Amazon.

## 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.

### Spotlight on: Belgium



### Top three preferred delivery methods

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

Basis: Have shopped online

■ Home delivery in daytime ■ In mailbox ■ To distribution point

### Top three international marketplaces

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

Basis: Have shopped online

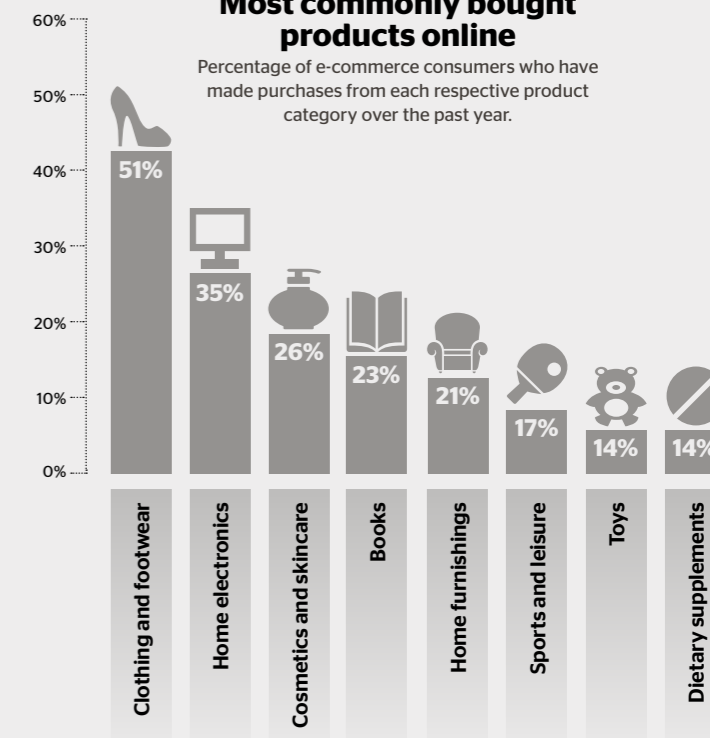
39%  
Zalando

21%  
Alibaba

17%  
Amazon

### Most commonly bought products online

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







**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.

## 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 in 2018, when the UN agency UNCTAD ranked the ability of 151 countries to promote domestic e-commerce through good digital infrastructure. The welcoming climate for digitalization often turns the country into a kind of workshop where major market participants test new ways of meeting customers. For example, IKEA chose to launch its augmented reality app first in the Netherlands and France.

Nevertheless, 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.

### Key indicators compared with average for Europe

Indicator	Value	Average for Europe
Internet penetration	96%	
Percentage of e-commerce consumers	92%	
Percentage of e-commerce consumers abroad	66%	
Average purchase per year (EUR)	EUR 651	
Growth in number of e-commerce consumers since 2014	13%	

## 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.

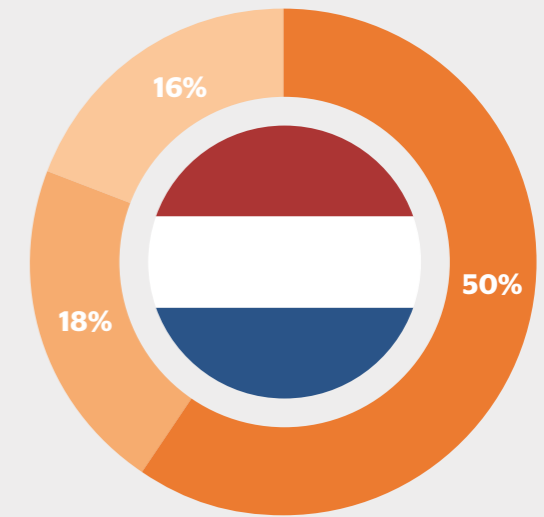
## Great interest in fashion

Consumers in the Netherlands are interested in fashion - only the Germans buy as much clothing and footwear online. In addition, Zalando is clearly 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 marketing via influencers on Instagram, and creating online communities that are integrated with the purchase experience.

### Spotlight on: Netherlands



### Top three preferred delivery methods

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

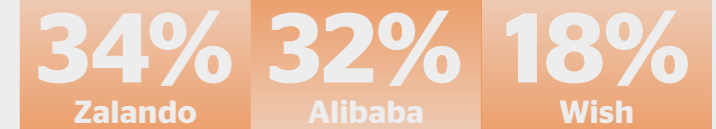
Basis: Have shopped online

Home delivery in daytime | In mailbox | Home delivery in evening

### Top three international marketplaces

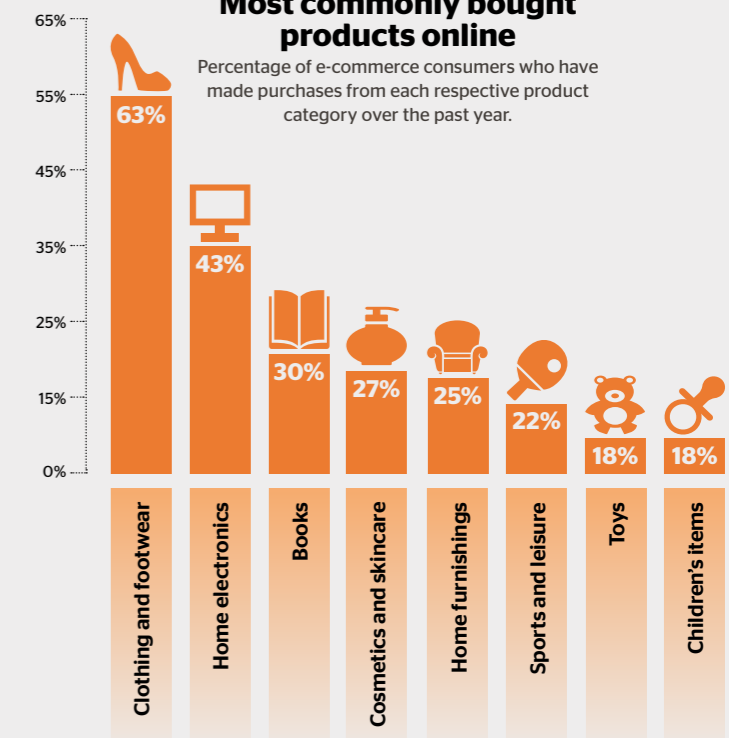
From which of the following e-commerce sites have you shopped online in the past year?

Basis: Have shopped online



### Most commonly bought products online

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







**Did you know that...**

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

## Italy: e-commerce skyrockets despite tough times

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 Idealo 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.

Average for Europe

### Key indicators compared with average for Europe

Internet penetration	<b>81%</b>
Percentage of e-commerce consumers	<b>78%</b>
Percentage of e-commerce consumers abroad	<b>66%</b>
Average purchase per year (EUR)	<b>EUR 852</b>
Growth in number of e-commerce consumers since 2014	<b>60%</b>

## Strong preferences regarding delivery

Italian consumers are most interested in having products that they purchased online delivered to their homes during the day. One explanation is that there is often someone at home who can receive the delivery, since it is more common in Italy than in the other surveyed countries that at least one person in the household is outside the workforce. Italian consumers, along with consumers in Spain, also place the highest value on being able to choose the time of delivery.

Regarding payments, the CartaSi credit card accounts for 40 percent of transactions in the Italian e-commerce market, according to E-commerce Europe. Paypal and cash on delivery are other common payment methods.

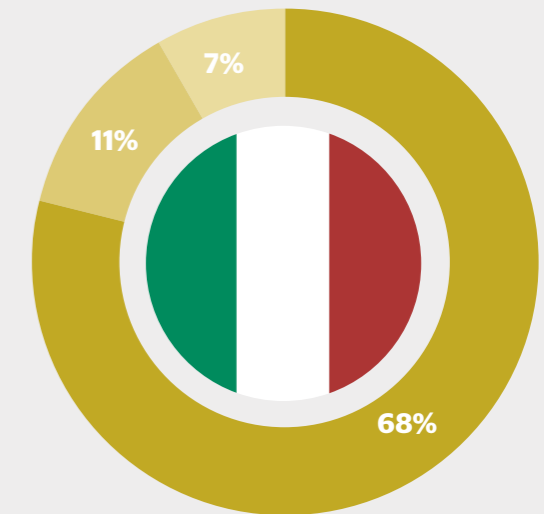
## Amazon is broadening Italy e-commerce

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. In addition, there may be untapped potential among older individuals.

For those who wish to reach Italian consumers, Facebook is often the most effective online marketing channel, though Youtube and Instagram are also popular.



### Top three preferred delivery methods

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

Basis: Have shopped online

- Home delivery in daytime
- In mailbox
- Home delivery in evening/ Delivery to workplace

### Top three international marketplaces

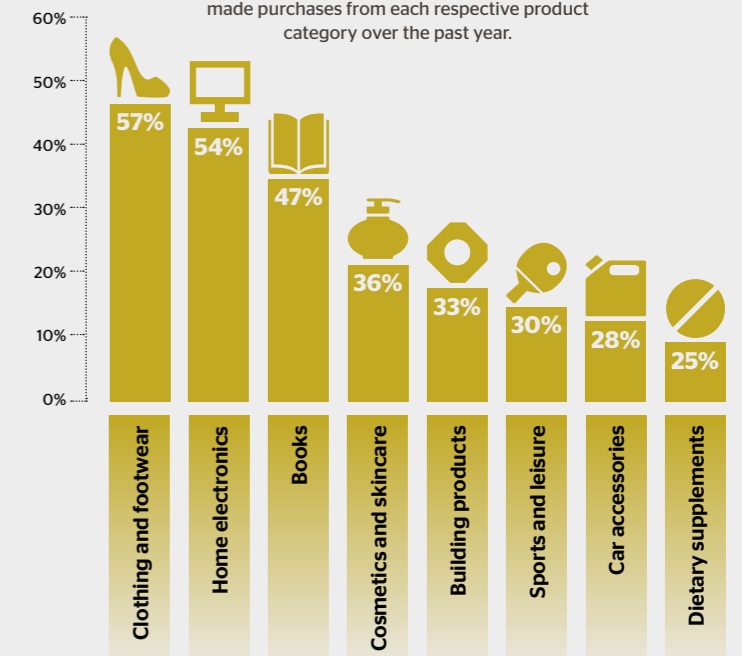
From which of the following e-commerce sites have you shopped online in the past year?

Basis: Have shopped online



### Most commonly bought products online

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







**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 benefitted 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 paves 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, 68 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**

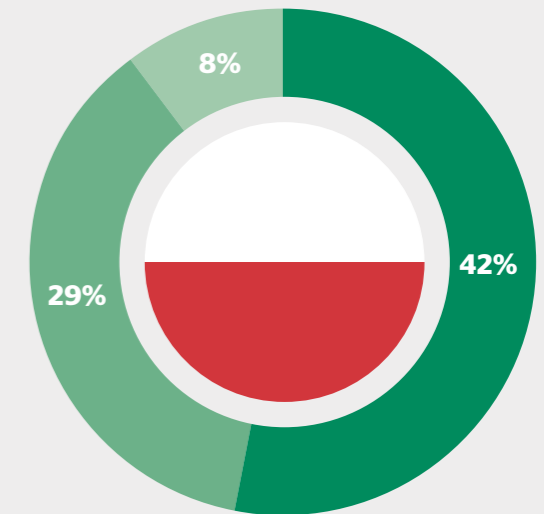
**The percentage who make online purchases** from abroad is still at a comparatively low level, 55 percent, but has increased by 5 percentage points since last year. Language barriers continue to be an obstacle, as 6 of 10 Polish consumers state that it is important that the online store where they shop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



**Top three preferred delivery methods**

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

Basis: Have shopped online  
 ■ Home delivery in daytime ■ Collect it yourself from a post box ■ Home delivery in evening

**Top three international marketplaces**

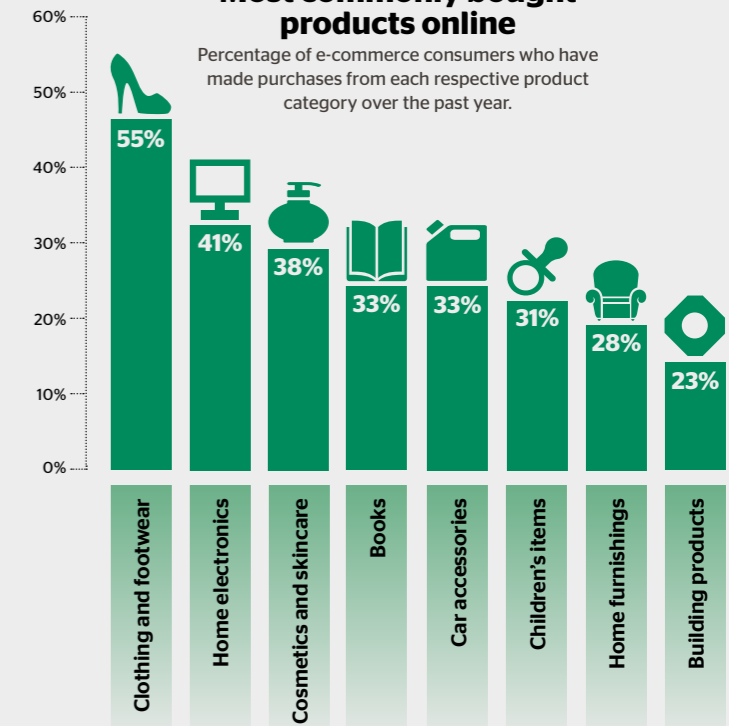
**From which of the following e-commerce sites have you shopped online in the past year?**

Basis: Have shopped online



**Most commonly bought products online**

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



**Key indicators compared with average for Europe**

Indicator	Value	Average for Europe
Internet penetration	82%	74%
Percentage of e-commerce consumers	80%	52%
Percentage of e-commerce consumers abroad	55%	27%
Average purchase per year (EUR)	EUR 523	EUR 470
Growth in number of e-commerce consumers since 2014	28%	0%





**Did you know that...**  
 In 2014, 29 percent of Spanish consumers who shopped online from abroad made a purchase from China. In 2019, the corresponding figure was 51 percent.

## Spain: market in recovery with focus on prices

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.

### Key indicators compared with average for Europe

Indicator	Spain	Average for Europe
Internet penetration	87%	85%
Percentage of e-commerce consumers	85%	85%
Percentage of e-commerce consumers abroad	69%	69%
Average purchase per year (EUR)	EUR 786	EUR 786
Growth in number of e-commerce consumers since 2014	30%	30%

## High demand for fast and flexible delivery

Spanish e-commerce consumers have the second highest expectations for fast delivery (the Netherlands is number one). One in four consumers expects to receive a product purchased online within one to two days, and willingness to pay for next-day delivery is high at 41 percent. Flexible delivery is also high on the wish list; an impressive 56 percent state that it is important to be able to decide the time at which the product is to be delivered. This trend is probably related to the fact that Spanish consumers want home delivery in the evening to a greater extent than consumers in other countries.

Regarding payment methods, credit and debit cards, as well as payment services such as Paypal, account for an impressive 90 percent of preferred payment methods.

## Buying abroad from China is popular

The recent financial crisis made Spanish consumers extremely price conscious. Many online purchases are made from abroad and Spanish consumers buy products online from China to a greater extent than consumers in other European countries. In order to offer faster delivery from China to Spain, this year the Spanish postal service Correos initiated a collaboration with the logistics network Cainiao, where Chinese Alibaba is the principle owner.

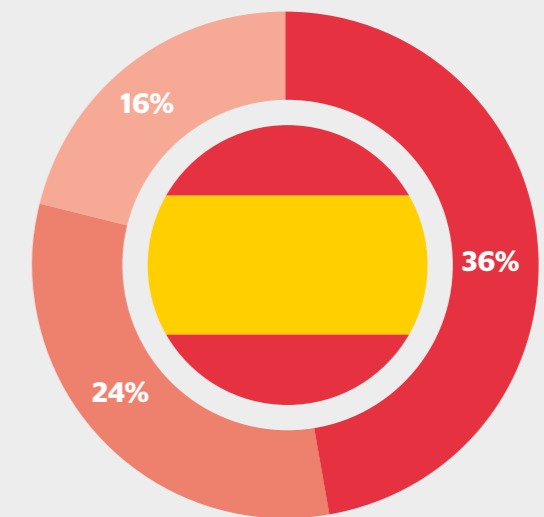
The Spanish e-commerce market is dominated by marketplaces, both international and domestic. The largest are Amazon.es and the domestic department store chain Elcorteingles.es. The food category has been steadily growing in recent years. Lidl recently started selling its products online in Madrid and is planning to expand to include the entire country.

## 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.

### Spotlight on: Spain



### Top three preferred delivery methods

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

Basis: Have shopped online

■ Home delivery in daytime ■ Home delivery in evening ■ In mailbox

### Top three international marketplaces

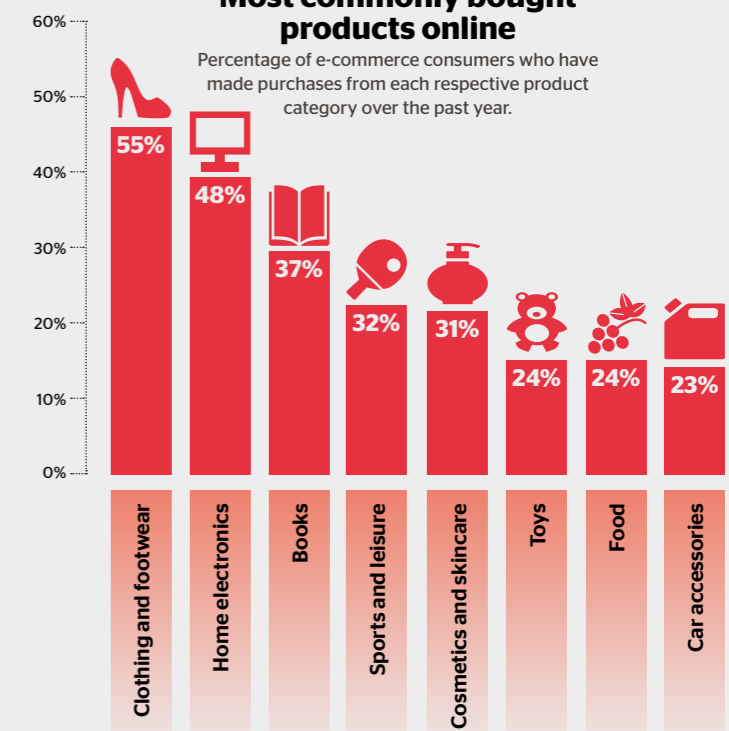
From which of the following e-commerce sites have you shopped online in the past year?

Basis: Have shopped online

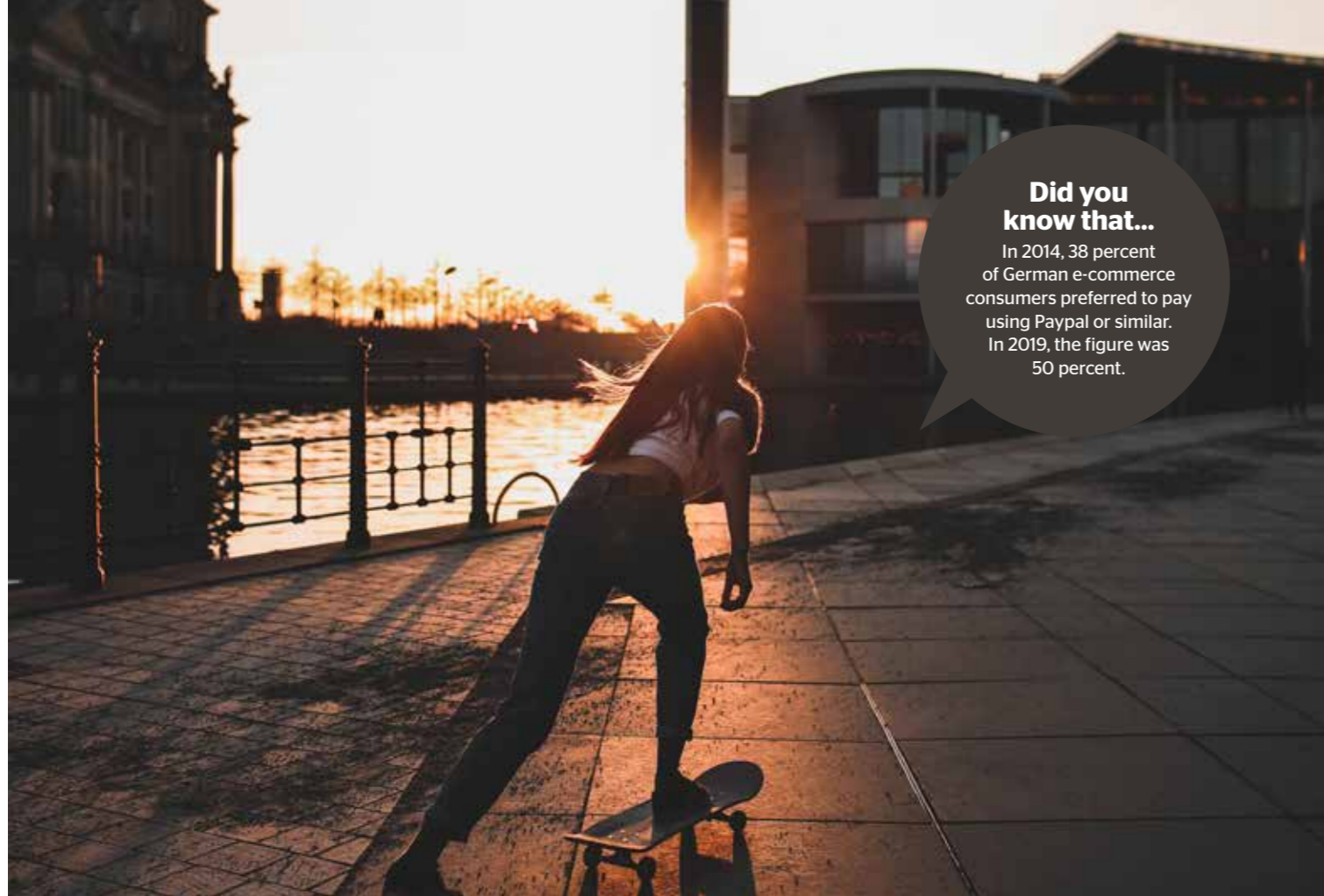


### Most commonly bought products online

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







**Did you know that...**  
 In 2014, 38 percent of German e-commerce consumers preferred to pay using Paypal or similar. In 2019, the figure was 50 percent.

## 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.

Key indicators compared with average for Europe		Average for Europe
Internet penetration	95%	
Percentage of e-commerce consumers	92%	
Percentage of e-commerce consumers abroad	66%	
Average purchase per year (EUR)	EUR 848	
Growth in number of e-commerce consumers since 2014	6%	

## 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

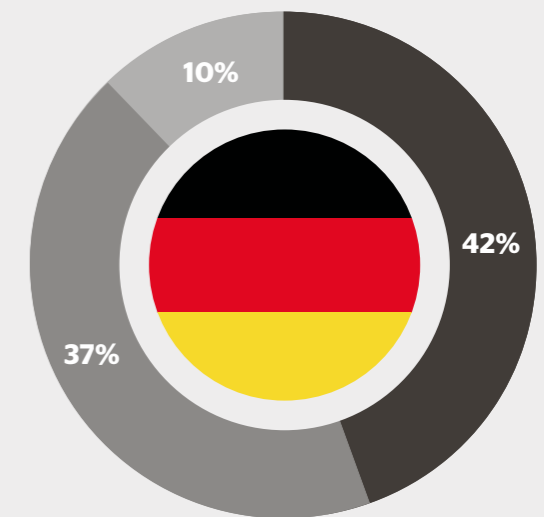
German e-commerce is dominated by a number of large marketplaces. The two largest are Amazon.de and Otto.de, where Amazon is clearly the leader with a market share of about 50 percent. Amazon is therefore an extremely important channel for e-retailers who want to become established in Germany, especially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

## Spotlight on: Germany



### Top three preferred delivery methods

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

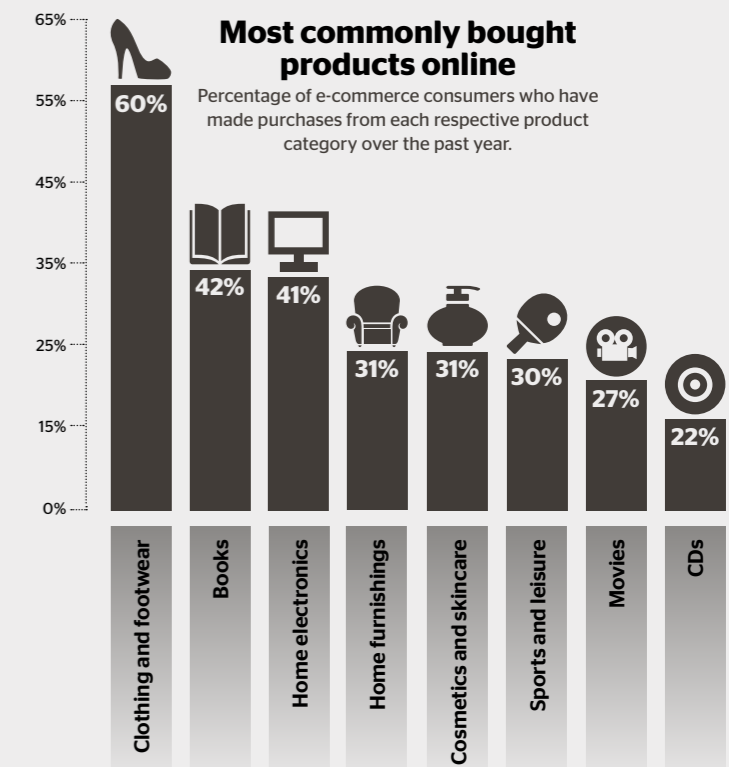
Basis: Have shopped online

■ Home delivery in daytime ■ In mailbox ■ Home delivery in evening

### Top three international marketplaces

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

Basis: Have shopped online





**Did you know that...**

In 2014, 50 percent of French consumers stated that lowest price was an important factor when deciding about shopping online. In 2019, the share had declined to 41 percent.

## 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 two sale periods that are required by law, one in winter and one in summer. In addition, retailers can hold campaign days on their own initiative under regulated conditions. In 2018, six domestic e-commerce participants joined forces to launch the campaign period "Les French Days," as an alternative to Black Friday. Les French Days are held a couple of days in late April.

### Key indicators compared with average for Europe

	Average for Europe
Internet penetration	92%
Percentage of e-commerce consumers	89%
Percentage of e-commerce consumers abroad	66%
Average purchase per year (EUR)	EUR 842
Growth in number of e-commerce consumers since 2014	15%

## Card payments dominate

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.

## Flash sales popular among French consumers

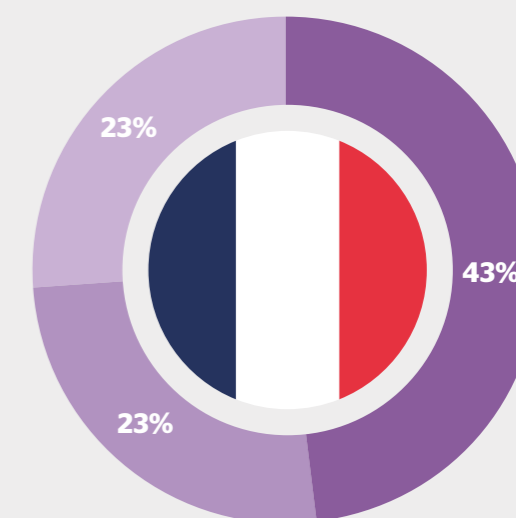
Domestic marketplaces have an important position on the French e-commerce market. Some large market participants include Amazon.fr, Cdiscount.com and Veepee.fr. The latter is what is known as a "flash sale" participant that focuses on temporary campaigns and sells products at a discount during limited 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.

### Spotlight on: France



### Top three preferred delivery methods

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

Basis: Have shopped online

■ In mailbox ■ Home delivery in daytime ■ Pickup from service outlet

### Top three international marketplaces

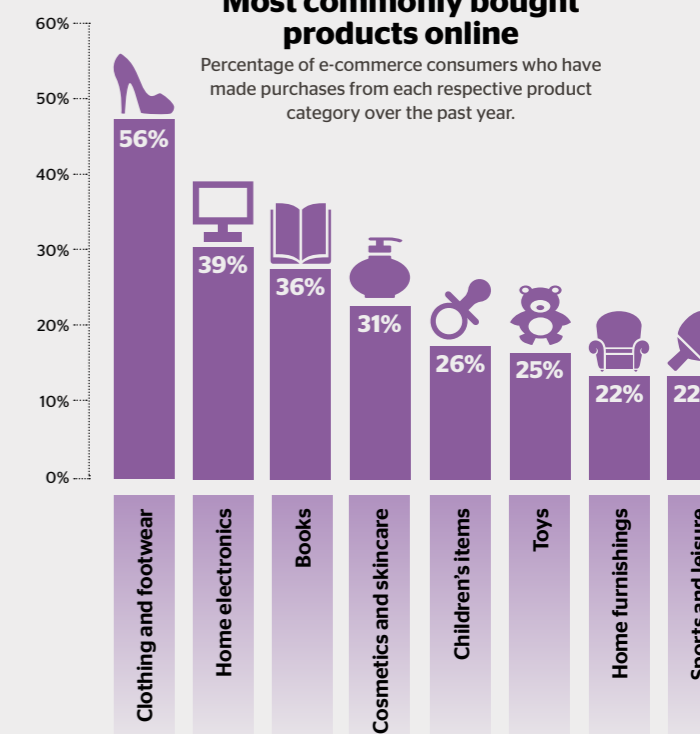
From which of the following e-commerce sites have you shopped online in the past year?

Basis: Have shopped online



### Most commonly bought products online

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







**Did you know that...**  
 Internet penetration in the Nordic region is among the highest in the world.

## 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 there are also distinctive national features. Denmark

and Sweden have many domestic e-commerce participants, while consumers in Norway - and even more so in Finland - shop online from foreign sites. Danish consumers are particularly price conscious and place high demands, while Finnish consumers are more modest. Denmark is also more densely populated than the other Nordic countries, which provides completely different conditions for logistics than are found in the region in general. Unlike the other countries, Norway is outside the EU, which means different rules for customs procedures and VAT.

### Key indicators compared with average for Europe

Indicator	Value	Average for Europe
Internet penetration	98%	~70%
Percentage of e-commerce consumers	94%	~60%
Percentage of e-commerce consumers abroad	81%	~50%
Average purchase per year (EUR)	EUR 817	~500
Growth in number of e-commerce consumers since 2014	11%	~5%

## Parcel machines and mobile payments gaining ground

The Nordic countries have high participation in the workforce 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 Komplet, Netonnet and Elgiganten are popular in home electronics. So far, food online works best in Denmark, which has short distances and is densely populated.

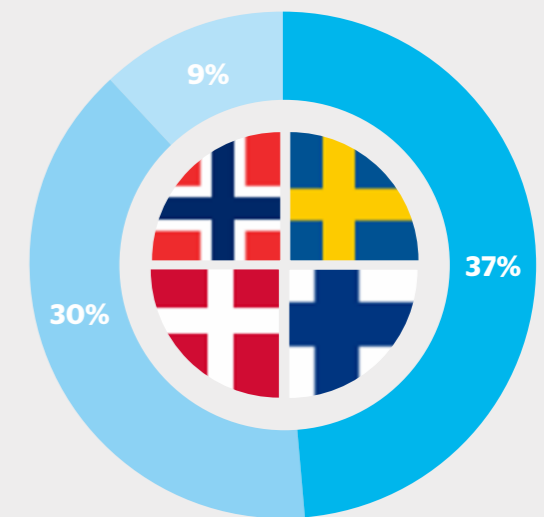
Nordic consumers buy products from other countries considerably more than other Europeans. They are often hunting for lower prices, but they also want to find a larger selection or niche products. In addition to Zalando, eBay and Wish are popular foreign online shopping sites. Much has been said about Amazon's grand entrance onto the Nordic market, but other than Zalando's 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.

### Spotlight on: Nordic region



### Top three preferred delivery methods

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

Basis: Have shopped online

■ In mailbox ■ To distribution point ■ Home delivery in daytime/Parcel machine

### Top three international marketplaces

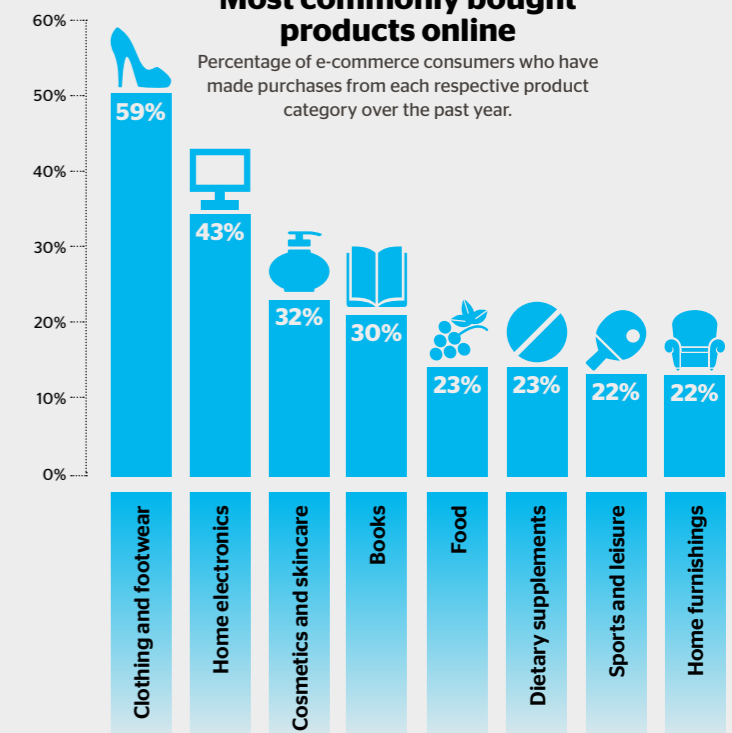
From which of the following e-commerce sites have you shopped online in the past year?

Basis: Have shopped online



### Most commonly bought products online

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



## 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

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Shopped online in the past year	94%	89%	94%	94%	95%	93%	95%	93%	92%
Have shopped online	95%	94%	96%	97%	98%	97%	97%	96%	96%
Have shopped online from abroad (Basis: Have shopped online)	71%	79%	71%	84%	68%	82%	72%	75%	86%

### Internet penetration

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Internet penetration*	96%	91%	96%	81%	82%	87%	95%	92%	98%

Source: Eurostat

### Population

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Total, millions	66.3	11.4	17.2	60.5	38.0	46.7	82.8	66.9	26.7
Percentage aged 15-79 years	77%	77%	79%	80%	81%	79%	80%	76%	78%
Aged 15-79, millions	51.2	8.8	13.7	48.2	30.6	36.8	66.5	50.8	20.8

Source: Eurostat

### Entire population (15-79 years)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Basis Shopped online in the past year	91%	81%	90%	76%	78%	81%	90%	86%	90%
Basis Have shopped online	91%	85%	92%	78%	80%	85%	92%	89%	94%
Basis Have shopped online from abroad	65%	68%	66%	66%	55%	69%	66%	66%	81%
Basis Have shopped online, millions	46.8	7.5	12.6	37.8	24.5	31.2	61.5	45.0	19.6
Basis Have shopped online from abroad, millions	33.3	6.0	9.0	31.6	16.7	25.5	44.1	33.7	17.0

### Average spend and turnover

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Average spend in one year, local currency (Basis: Have shopped online)	888.9	560.4	651.1	851.6	2244.3	786.0	847.5	841.8	6575.1
Exchange rate May 29, 2018, EUR	1.13	1.00	1.00	1.00	0.23	1.00	1.00	1.00	
Average spend in one year, EUR (Basis: have shopped online)	1007.1	560.4	651.1	851.6	522.9	786.0	847.5	841.8	816.5
Average spend in one year, EUR (Basis: entire population aged 15-79)	920.5	478.2	600.5	668.1	418.9	665.4	783.8	745.7	769.3
Total turnover, EUR billions	47.11	4.22	8.20	32.17	12.81	24.49	52.12	37.86	16.01

## Product categories

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

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

#### Clothing/shoes

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	61%	50%	63%	50%	55%	55%	65%	56%	60%
Millions of consumers	28.7	3.7	7.9	18.8	13.5	17.3	39.8	25.3	11.8

#### Home electronics

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	43%	34%	43%	47%	41%	48%	41%	39%	43%
Millions of consumers	20.0	2.5	5.4	17.8	10.0	15.0	25.1	17.5	8.5

#### Books (physical and audiobooks)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	40%	22%	30%	41%	33%	37%	42%	36%	30%
Millions of consumers	18.9	1.7	3.8	15.5	8.0	11.5	26.0	16.1	6.0

#### Cosmetics, haircare and skincare

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	32%	25%	27%	31%	38%	31%	31%	31%	33%
Millions of consumers	15.0	1.9	3.4	11.8	9.4	9.7	19.3	14.1	6.4

#### Home furnishings

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	30%	21%	25%	15%	28%	21%	31%	22%	23%
Millions of consumers	13.9	1.6	3.1	5.7	6.8	6.5	19.3	10.0	4.5

#### Movies

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	25%	11%	15%	22%	12%	20%	27%	18%	19%
Millions of consumers	11.7	0.8	1.8	8.1	2.9	6.1	16.7	8.0	3.7

#### Sports and leisure products

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	13%	17%	22%	26%	22%	32%	30%	22%	23%
Millions of consumers	5.9	1.3	2.7	9.8	5.5	10.1	18.3	10.0	4.5

#### Food

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	32%	10%	13%	18%	18%	24%	17%	21%	24%
Millions of consumers	14.7	0.8	1.6	6.9	4.3	7.4	10.6	9.6	4.6



CDs

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	20%	10%	13%	16%	13%	15%	22%	17%	10%
Millions of consumers	9.5	0.8	1.6	6.1	3.2	4.7	13.4	7.9	2.1

Car accessories

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	18%	10%	14%	24%	33%	23%	22%	18%	15%
Millions of consumers	8.3	0.7	1.7	9.2	8.0	7.2	13.5	8.0	2.9

Toys

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	23%	14%	18%	21%	22%	24%	20%	25%	15%
Millions of consumers	10.9	1.1	2.3	7.8	5.3	7.5	12.2	11.4	2.9

Children's items

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	21%	14%	18%	20%	31%	21%	19%	26%	17%
Millions of consumers	9.7	1.1	2.3	7.5	7.7	6.7	11.8	11.6	3.3

Dietary supplements and similar

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	16%	15%	14%	22%	23%	15%	21%	11%	23%
Millions of consumers	7.5	1.1	1.8	8.4	5.6	4.8	13.1	4.9	4.6

Shopping from abroad by young consumers

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

(Basis: Have access to the Internet)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Proportion 2019	18%	16%	23%	18%	31%	25%	10%	27%	18%
Proportion 2015	16%	11%	10%	14%	4%	26%	5%	9%	18%
Change, 2015-2019 (percentage points)	2	4	13	4	26	0	6	18	1

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

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	17%	23%	23%	18%	24%	26%	21%	24%	30%
Millions of consumers	5.5	1.3	2.1	5.8	4.0	6.7	9.2	8.2	1.3

Home electronics

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	10%	13%	14%	22%	14%	21%	9%	13%	17%
Millions of consumers	3.3	0.8	1.3	7.0	2.3	5.4	4.2	4.5	0.8

Books (physical and audiobooks)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	7%	4%	8%	5%	6%	4%	7%	9%	10%
Millions of consumers	0.4	0.3	2.5	0.8	1.6	1.7	2.3	0.4	0.4

Cosmetics, haircare and skincare

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	5%	8%	7%	6%	9%	9%	7%	7%	11%
Millions of consumers	1.7	0.5	0.6	2.0	1.6	2.2	3.3	2.3	0.5

Home furnishings

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	4%	8%	9%	4%	9%	4%	6%	7%	8%
Millions of consumers	1.5	0.5	0.8	1.2	1.4	1.1	2.7	2.3	0.4

Movies

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	3%	4%	5%	4%	3%	5%	4%	5%	7%
Millions of consumers	1.2	0.2	0.4	1.3	0.5	1.1	1.8	1.7	0.3

Sports and leisure products

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	3%	6%	6%	7%	6%	10%	7%	6%	8%
Millions of consumers	0.9	0.4	0.5	2.1	1.0	2.6	3.0	1.9	0.3

Food

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	2%	3%	1%	2%	2%	2%	2%	3%	4%
Millions of consumers	0.8	0.2	0.1	0.7	0.3	0.6	1.0	1.0	0.2

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

### CDs

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	5%	4%	4%	6%	4%	4%	5%	6%	5%
Millions of consumers	1.6	0.2	0.3	1.9	0.7	1.0	2.0	2.1	0.2

### Car accessories

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	7%	6%	7%	12%	9%	10%	5%	8%	9%
Millions of consumers	2.2	0.3	0.6	3.7	1.4	2.5	2.1	2.8	0.4

### Toys

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	5%	5%	5%	6%	6%	7%	5%	6%	5%
Millions of consumers	1.6	0.3	0.5	1.9	1.0	1.9	2.2	2.1	0.2

### Children's items

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	6%	5%	6%	5%	11%	6%	5%	9%	6%
Millions of consumers	2.1	0.3	0.5	1.6	1.8	1.6	2.2	3.1	0.3

## Which payment method is preferred?

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

(Basis: Have shopped online)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Debit card or credit card	48%	62%	30%	34%	24%	47%	18%	60%	41%
Invoice	0%	2%	9%	1%	1%	1%	24%	1%	20%
Direct payment through my bank	2%	12%	21%	2%	31%	2%	6%	2%	12%
PayPal or similar	46%	21%	29%	55%	27%	43%	50%	33%	21%
Cash on Delivery	1%	1%	2%	5%	15%	5%	0%	1%	1%
Payment by installments	0%	0%	1%	0%	0%	0%	0%	0%	2%
Other method	1%	1%	8%	2%	1%	1%	0%	1%	-
Don't know	1%	1%	1%	0%	1%	0%	1%	1%	2%

## 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.

(Basis: Have shopped online)

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

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

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

(Basis: Have shopped online)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Delivered to my mailbox/multi-occupancy mailbox by the mail carrier	14%	20%	18%	11%	6%	16%	37%	43%	37%
Collect it myself from a distribution point	4%	13%	10%	4%	7%	7%	2%	23%	30%
Home delivery in daytime	62%	45%	50%	68%	42%	36%	42%	23%	9%
Home delivery in evening	11%	12%	16%	7%	8%	24%	10%	6%	6%
Delivery to my workplace	4%	4%	1%	7%	5%	9%	2%	1%	1%
Collect it myself from the online store's physical store	2%	2%	2%	1%	2%	4%	2%	1%	6%
Collect it myself from a parcel machine.	1%	2%	0%	2%	29%	2%	4%	1%	9%
Other	0%	1%	1%	1%	0%	1%	0%	0%	1%
Unsure, don't know	1%	1%	2%	0%	1%	2%	1%	0%	2%



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)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
1-2 days	16%	25%	33%	19%	23%	25%	19%	16%	10%
3-5 days	74%	53%	50%	66%	67%	55%	71%	64%	59%
6 days or more	5%	17%	11%	12%	6%	17%	8%	19%	23%
Don't know	5%	6%	6%	2%	4%	3%	2%	2%	7%

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

**Percentage who responded Yes**

(Basis: Have shopped online)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	41%	14%	24%	37%	46%	38%	28%	31%	20%

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)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	36%	27%	53%	60%	68%	67%	39%	54%	18%

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

**Percentage who responded Yes**

(Basis: Have shopped online)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	90%	86%	93%	83%	97%	88%	89%	90%	89%

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)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	73%	73%	74%	65%	80%	64%	68%	62%	59%

Percentage of the population that returned an online purchase in the past year.

**Percentage who responded Yes**

(Basis: Have shopped online)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	38%	39%	51%	46%	36%	45%	53%	44%	43%

Returns per product category

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

(Basis: Entire population, 15-79 years)

**Clothing/shoes**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	20.1%	19.5%	32.2%	16.4%	17.5%	19.3%	29.9%	19.1%	25.9%
Millions of consumers	9.1	1.6	4.1	8.1	3.9	6.8	18.8	8.6	1.4

**Home electronics**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	5.4%	4.4%	7.3%	9.8%	5.3%	9.3%	7.7%	7.6%	4.4%
Millions of consumers	2.4	0.4	0.9	4.8	1.2	3.3	4.8	3.4	0.2

**Books (physical and audiobooks)**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	2.2%	1.0%	2.4%	2.5%	1.6%	2.1%	2.7%	2.5%	1.7%
Millions of consumers	1.0	0.1	0.3	1.2	0.4	0.8	1.7	1.1	0.1

**Cosmetics, haircare and skincare**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	1.3%	0.6%	1.3%	1.6%	1.5%	0.8%	2.5%	1.4%	1.2%
Millions of consumers	0.6	0.0	0.2	0.8	0.3	0.3	1.6	0.6	0.1

**Home furnishings**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	2.0%	1.6%	2.5%	1.3%	1.9%	2.4%	4.6%	2.4%	1.6%
Millions of consumers	0.9	0.1	0.3	0.6	0.4	0.8	2.9	1.1	0.1

**Movies**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	1.6%	0.6%	1.9%	1.8%	1.1%	1.6%	2.5%	2.8%	1.5%
Millions of consumers	0.7	0.0	0.2	0.9	0.2	0.6	1.6	1.3	0.1

**Sports and leisure products**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	1.7%	1.7%	3.0%	2.6%	1.4%	3.5%	4.3%	2.5%	2.3%
Millions of consumers	0.8	0.1	0.4	1.3	0.3	1.2	2.7	1.1	0.1

**Food**

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	1.0%	0.2%	1.5%	1.1%	0.8%	0.8%	1.3%	1.4%	0.7%
Millions of consumers	0.4	0.0	0.2	0.6	0.2	0.3	0.8	0.6	0.0

## DETAILED RESULTS

### Product categories (returns) cont.

#### CDs

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	1.7%	0.5%	1.9%	1.4%	1.5%	1.4%	1.9%	2.3%	1.1%
Millions of consumers	0.8	0.0	0.2	0.7	0.3	0.5	1.2	1.0	0.1

#### Car accessories

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	2.8%	1.4%	2.8%	4.3%	4.1%	2.4%	2.7%	3.0%	2.1%
Millions of consumers	1.3	0.1	0.4	2.1	0.9	0.9	1.7	1.4	0.1

#### Toys

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	1.6%	1.6%	1.0%	1.9%	1.0%	2.7%	2.7%	1.8%	1.0%
Millions of consumers	0.7	0.1	0.1	0.9	0.2	1.0	1.7	0.8	0.1

#### Children's items

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
%	3.0%	1.5%	2.5%	2.5%	3.1%	2.4%	3.8%	6.3%	2.6%
Millions of consumers	1.4	0.1	0.3	1.2	0.7	0.8	2.4	2.8	0.1

### Proportion who have shopped online via mobile phone or tablet in the past year

(Basis: Have shopped online)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
2019 %	65%	54%	61%	76%	62%	77%	58%	60%	66%
2018 %	65%	46%	58%	66%	53%	71%	56%	57%	63%
Change in percentage points over the past year	0	8	3	10	9	6	2	3	3

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

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

Percentage who responded Yes (Basis: Have shopped online)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Wish	13%	14%	18%	27%	8%	19%	13%	23%	21%
Zalando	3%	39%	34%	42%	31%	22%	24%	22%	35%
Amazon	87%	17%	16%	93%	16%	87%	83%	82%	18%
eBay	61%	9%	10%	53%	12%	42%	55%	30%	24%
Etsy	7%	2%	3%	6%	1%	2%	3%	3%	3%
Alibaba/Aliexpress	6%	21%	32%	22%	23%	38%	6%	16%	10%
JD.com	7%	1%	4%	2%	1%	3%	1%	3%	1%
Allegro	1%	1%	1%	2%	87%	2%	1%	2%	1%
None of the above	3%	37%	36%	2%	7%	6%	7%	8%	36%
Don't know	1%	1%	1%	0%	1%	0%	1%	0%	1%

### Favorite marketplaces

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
First place	Amazon (87%)	Zalando (39%)	Zalando (34%)	Amazon (93%)	Allegro (87%)	Amazon (87%)	Amazon (83%)	Amazon (82%)	Zalando (36%)
Second place	eBay (61%)	Alibaba/Aliexpress (21%)	Alibaba/Aliexpress (32%)	eBay (53%)	Zalando (31%)	eBay (42%)	eBay (55%)	eBay (30%)	eBay (23%)
Third place	Wish (13%)	Amazon (17%)	Wish (18%)	Zalando (42%)	Alibaba/Aliexpress (23%)	Alibaba/Aliexpress (38%)	Zalando (24%)	Wish (23%)	Wish (22%)
Fourth place	Etzy (7%)	Wish (14%)	Amazon (16%)	Wish (27%)	Amazon (16%)	Zalando (22%)	Wish (13%)	Zalando (22%)	Amazon (18%)

Note: 37% stated "none of the above" (UK), Note: 36% stated "none of the above" (Netherl.), Note: 36% stated "none of the above" (Nordic region)

### Reason for shopping from a specific country

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

(Basis: Have shopped online from abroad.)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
I'm looking for a wide range of products	17%	33%	32%	39%	43%	34%	28%	25%	36%
I'm looking for a specific brand	26%	24%	24%	28%	29%	30%	22%	26%	28%
The prices are generally lower	57%	56%	62%	50%	58%	54%	49%	57%	60%
The country is reliable for buying, payments and delivery	12%	17%	10%	18%	12%	22%	11%	12%	14%
I was curious	10%	9%	15%	12%	19%	19%	22%	11%	12%
I find products there that I don't find elsewhere	37%	34%	24%	22%	31%	26%	37%	30%	32%

### Favorite countries

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
First place	China (30%)	Netherl. (39%)	China (32%)	China (28%)	China (26%)	China (35%)	China (28%)	China (28%)	China (30%)
Second place	USA (18%)	China (19%)	Germany (17%)	UK (23%)	Germany (14%)	UK (19%)	UK (14%)	UK (18%)	UK (25%)
Third place	Germany (8%)	Germany (16%)	USA (11%)	Germany (21%)	UK (11%)	USA (14%)	USA (13%)	Germany (15%)	Germany (22%)
Fourth place	Spain (5%)	UK (10%)	UK (10%)	USA (14%)	USA (10%)	Germany (13%)	Netherl. (6%)	USA (13%)	USA (19%)



## Percentage of the population that shopped online from various countries

From what countries have you bought online in the past year? (Basis: Entire population, 15-79 years)

	UK	Belgium	Netherl.	Italy	Poland	Spain	Germany	France	Nordic region
Sweden %	2%	1%	2%	2%	2%	1%	3%	2%	13%
Millions of consumers	0.6	0.1	0.2	0.5	0.4	0.3	1.4	0.6	2.4
Denmark %	2%	1%	2%	1%	1%	1%	3%	2%	7%
Millions of consumers	0.7	0.0	0.2	0.5	0.2	0.3	1.2	0.5	1.2
Norway %	1%	0%	1%	1%	1%	1%	2%	1%	3%
Millions of consumers	0.4	0.0	0.1	0.3	0.2	0.3	0.8	0.5	0.4
Finland %	2%	0%	1%	1%	1%	1%	1%	1%	1%
Millions of consumers	0.5	0.0	0.1	0.3	0.1	0.3	0.6	0.4	0.2
Iceland %	1%	0%	1%	1%	1%	1%	1%	2%	1%
Millions of consumers	0.5	0.0	0.1	0.4	0.1	0.2	0.4	0.5	0.1
UK %	0%	10%	10%	23%	11%	19%	14%	18%	25%
Millions of consumers	0.0	0.6	0.9	7.4	1.8	4.8	6.3	6.2	4.2
Germany %	8%	16%	17%	21%	14%	13%	0%	15%	22%
Millions of consumers	2.8	1.0	1.5	6.6	2.4	3.3	0.0	5.1	3.8
Netherlands %	2%	39%	0%	3%	2%	3%	6%	3%	3%
Millions of consumers	0.7	2.3	0.0	1.0	0.4	0.7	2.6	0.9	0.5
France %	4%	6%	2%	9%	3%	8%	6%	0%	2%
Millions of consumers	1.5	0.4	0.2	2.8	0.4	2.0	2.6	0.0	0.4
Spain %	5%	2%	2%	7%	2%	0%	3%	5%	2%
Millions of consumers	1.6	0.1	0.2	2.3	0.3	0.0	1.4	1.7	0.4
Italy %	3%	2%	2%	0%	2%	5%	4%	5%	2%
Millions of consumers	0.9	0.1	0.2	0.0	0.3	1.3	1.7	1.6	0.4
Russia %	0%	0%	1%	1%	1%	1%	1%	1%	1%
Millions of consumers	0.1	0.0	0.1	0.3	0.2	0.3	0.4	0.3	0.1
Rest of Europe %	4%	3%	3%	3%	3%	3%	5%	3%	5%
Millions of consumers	1.3	0.2	0.2	0.8	0.5	0.9	2.2	1.1	0.9
USA %	18%	6%	11%	14%	10%	14%	13%	13%	19%
Millions of consumers	6.0	0.4	1.0	4.4	1.6	3.6	5.8	4.5	3.2
Canada %	2%	1%	2%	2%	1%	1%	1%	2%	1%
Millions of consumers	0.6	0.1	0.2	0.6	0.2	0.3	0.5	0.8	0.2
Central America %	1%	0%	1%	1%	0%	1%	1%	1%	0%
Millions of consumers	0.2	0.0	0.1	0.4	0.0	0.2	0.4	0.2	0.1
China %	30%	19%	32%	28%	26%	35%	28%	28%	30%
Millions of consumers	10.0	1.1	2.9	8.7	4.3	9.0	12.5	9.5	5.1
India %	1%	0%	1%	1%	0%	2%	1%	1%	1%
Millions of consumers	0.4	0.0	0.0	0.4	0.1	0.5	0.6	0.4	0.2
Japan %	4%	2%	2%	4%	2%	6%	3%	4%	2%
Millions of consumers	1.3	0.1	0.2	1.1	0.4	1.5	1.2	1.4	0.4
Rest of Asia %	1%	1%	2%	1%	1%	2%	3%	2%	2%
Millions of consumers	0.5	0.1	0.2	0.4	0.2	0.6	1.2	0.6	0.4
Australia %	2%	0%	1%	1%	1%	1%	1%	1%	1%
Millions of consumers	0.5	0.0	0.1	0.4	0.1	0.2	0.5	0.3	0.3
South America %	0%	0%	1%	0%	0%	0%	0%	1%	0%
Millions of consumers	0.1	0.0	0.0	0.1	0.0	0.1	0.2	0.2	0.0
Africa %	0%	0%	0%	0%	0%	0%	0%	0%	0%
Millions of consumers	0.2	0.0	0.0	0.1	0.0	0.1	0.1	0.1	0.0

## PostNord - a partner for e-commerce

PostNord provides distribution solutions all over the world. Outside the Nordics, PostNord has an established presence via its subsidiary, Direct Link, which offers global delivery of products via its local branches in Australia, Germany, Hong Kong, Singapore, the 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, from and within 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 communication, product distribution and logistics.

We have a harmonized, Nordic logistics

service offering, ranging from retail supplies and third-party logistics to product distribution and returns processing. With the widest-ranging distribution network in the Nordic region, we shrink the distance between e-commerce and the end-customer. PostNord has 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](http://www.postnord.com) and [www.directlink.com](http://www.directlink.com)

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