

E-commerce in the Nordics 2015



postnord

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About this report

For the seventh consecutive year, PostNord has conducted a study of the Nordic e-commerce market and published a report of its findings entitled "E-commerce in the Nordics".

This year's report is based on web interviews carried out by TNS SIFO during all four quarters of 2014. The web-based interviews were conducted with a nationally representative sample of individuals between the ages of 18 and 79 from Sweden, Denmark, Norway and Finland. Please note that not all questions in the report were asked during all quarters. Since this method is new, the results are not comparable with last year's results. In 2014, Nordic region e-commerce sales have been estimated for the first time.

The survey was conducted using TNS SIFO's web panel, with the following number of respondents per country and per quarter:

	Q1	Q2	Q3	Q4	Average
Sweden	1 180	1 326	1 301	1 066	1 218
Denmark	1 210	1 479	1 479	1 170	1 335
Norway	1 044	1 427	1 337	1 151	1 240
Finland	1 263	1 310	1 305	1 196	1 269

Because the survey was conducted via web panels, it is representative of the portion of the population that has Internet access. Some questions were asked only during one quarter and are therefore reported on a quarterly basis in tables and graphs.

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

PostNord also publishes the E-barometer in Sweden, and in Denmark we are the main sponsors of the Danish Association for Distance and Internet Commerce (FDIH) E-commerce Analysis. These reports are based on a different methodology and are therefore not fully comparable with this report.

The Nordics, an e-commerce market at the cutting edge

Nordic residents' quick adaptation to the new digital climate - combined with our history of distance selling and our strong economies - creates a unique e-commerce environment.

The Nordic region is large, both geographically and as an economy. In terms of area, the Nordic region is larger than Germany, the UK and Italy combined. Although the Nordic region is sparsely populated compared with the rest of Europe, Sweden, Norway, Denmark and Finland have a high aggregate GDP and, taken together, represent the sixth largest economy in Europe.

Thanks to our large geographical area, we also have a history and culture of distance selling - which has made the transition to e-commerce an easy one for Nordic residents in general.

During 2014, the Nordic population shopped online for a total of EUR 15.4 billion. Our e-commerce-related B2C consignments increased 15 percent on the Nordic market in 2014. We see further evidence of this increase in PostNord's operations.

The digital trend has entailed many changes for private individuals and companies in the Nordics. In parallel with the strong expansion of digital channels, the boundaries between physical and digital shopping sites are being erased.

We see, for instance, that consumers look in-store at products they plan to buy online, and vice versa.

The Nordics as a region is also sensitive to shifting trends. For example, Nordic countries have higher Internet penetration than the EU average, and a large percentage of the population uses smartphones or tablets on a daily basis to surf online.

This trend has also resulted in consumers demanding more from their suppliers. Mail items need to reach recipients quickly, and the option of choosing delivery terms (e.g., how and when a product is delivered) is increasingly important to consumers.



Håkan Ericsson
President and
Group CEO
PostNord

This is evident from the findings of this “E-commerce in the Nordics” report, as well as from our day-to-day operations at PostNord.

“The boundaries between physical and digital shopping sites are being erased”

We are publishing “E-commerce in the Nordics” for the seventh consecutive year. Our goal in doing so is to share the insights we gained both through our regularly conducted surveys and as a major e-commerce partner to Nordic companies. Our report provides details on the current situation, today's e-commerce trends, and our predictions for the future.

Håkan Ericsson
President and Group CEO
PostNord

Availability and freedom of choice increasingly important

Nordic e-commerce is undergoing dramatic development and following the latest trends - the most obvious of which is the omni-channel combination of commerce in physical and digital channels. This is what PostNord's e-commerce experts say when analyzing and commenting on this year's survey results and the Nordic e-commerce trend. The critical success factor is being responsive to consumers' needs and expectations in terms of availability and freedom of choice - and the personal touch is increasingly important.

All PostNord experts agree that e-commerce in the Nordics is developing dramatically. Shopping online is becoming more and more natural for Nordic consumers. A growing variety of products are available online, and e-tailers are improving their websites and selections.

According to experts, our survey results as a whole follow the anticipated trend - including the sectors that are growing and the way e-tailers are developing their sites.

Recently there have been noticeable improvements in Norwegian e-shops, according to experts. Norwegian consumers also spend the most online. Kristin Anfindsen, E-commerce Development Manager at PostNord Norway, emphasizes this, pointing out that Norwegian consumers are increasingly alternating between using e-shops and physical stores for researching and purchasing products. She believes Norway will see more integration between physical and digital channels in the future.

"I also think Norwegian e-tailers will need to counter the tough competition from abroad. To stay competitive, Norwegian e-tailers should also review the way they develop their product selection, work with physical and digital marketing, and go that extra mile in terms of logistics, service and personal treatment," she says, adding, "This applies to all Nordic e-tailers."

PostNord e-commerce specialist Arne Andersson thinks that conditions for e-tailers in the Nordics are generally good and that we are well-equipped for the future.

"To varying degrees the Nordic region is a fertile ground for start-ups, with new entrepreneurs entering

the e-commerce market. There is an incredible revitalization of new young entrepreneurs - which also improves our capacity to keep up in terms of technology."

"This might not apply to Finland, where e-shops are not as well-developed," he continues. Jouni Lamberg, Head of E-commerce at PostNord Finland, agrees.

"There's no lack of willingness to buy. On the contrary, Finnish consumers want to shop and are just as technologically advanced as consumers in other Nordic countries, but the domestic selection is still a little too poor," says Lamberg.



marketing in both online and in traditional channels in order to reach all age and target groups. Finnish e-tailers also need to become better at adapting webpages for display on devices like tablets and mobile phones. This is also evident from the low share of consumers in Finland who use their phones to shop online.

But this is not limited to Finland. Denmark too, has a low number of mobile phone shoppers - a fact that experts attribute to the relatively few very large e-tailers. According to Carsten Dalbo, Head of E-commerce at PostNord Denmark, retailers will need to adapt more as consumers make more demands and expect to have greater influence over their purchasing. This applies to deliveries as well.

“Traditionally, e-tailers have determined the shipping terms for e-commerce, but we’re seeing a shift towards consumers taking more control. Consumers

“All PostNord experts emphasize the growing need to listen to customers”

are managing and integrating more with suppliers via e-mail, phone, and other channels. What used to be communication from company to consumer has become more of a dialogue.”

All PostNord experts emphasize the growing need to listen to customers, which is closely related to the powerful trends of prioritizing availability and freedom of choice.

E-commerce specialist Arne Andersson says, “The trend is toward availability from several aspects, including having many different stores to choose from. Inventory is another aspect. To have the capacity to connect all channels and fully achieve omni-channel success, products need to be easily available in all channels.”

He argues the Nordics are still not omni-channel - in other words, physical and digital sales channels are still not integrated. Part of the solution lies in organizational changes and modifying old systems and routines to ensure that the entire chain from suppliers to retailers becomes better at collaborating.

“Those of us operating in the supply chain need to become more seamless so that we can switch over completely from multi-channel to seamless omni-channel e-commerce,” says Andersson. “We need to become better at communicating with each other and with our customers. With all due deference to technology and marketing, in the final analysis I think the most important factor for enabling well-functioning e-commerce is having good internal communication, so that the staff fully understands the company’s strategy and can communicate with customer based on that.”



The experts



Arne Andersson,
E-commerce specialist
PostNord, adviser and lecturer
on e-commerce in Sweden.



Kristin Anfindsen,
E-commerce Development
Manager at PostNord Norway.



Carsten Dalbo,
Head of Logistics and
E-commerce at PostNord
Denmark.



Jouni Lamberg,
Vice-President of E-commerce,
Mail and Marketing at
PostNord Finland.

E-commerce purchases total over EUR 15 billion

>> **Nordic e-commerce valued at EUR 15.4 billion** (Q1-Q4)

What is the estimated value of the products you purchased online during the past three months?



More than 12 million Nordic residents shopped online in 2014

Nordic residents are experienced and keen e-shoppers. On average, 12.4 million Nordic residents shopped online during each quarter of 2014. Sweden represents the largest share with nearly 5 million e-commerce consumers, while other Nordic countries are close behind with between 2.3 and 2.7 million e-commerce consumers every quarter.

One-third of Nordic residents shop online each month, representing an increase in all countries over last year. Danes are the most frequent e-commerce consumers; nearly two in five stated that they shop online at least once a month. In Finland, by contrast, only one in five shopped online at least once a month.

We shop online mainly because it's easy

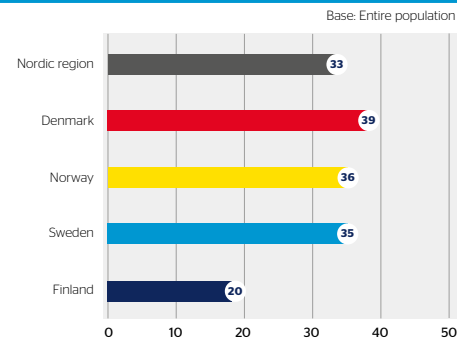
Clearly, the main reason that Nordic residents shop online is because it's easy to do so – it's flexible, convenient and saves time. Other important reasons: perceptions among Nordic residents that online shopping offers better prices and selection than shopping in traditional stores.

Finnish consumers differ from their Nordic neighbors in this regard. In Finland, ease and convenience are much less important, while price and selection are of greater importance. Price appears to be losing significance as a key factor in Denmark, Sweden and Norway compared with last year's survey.

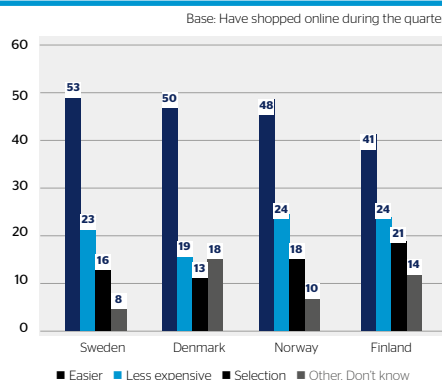
Nordic e-commerce valued at EUR 15.4 billion

Nordic consumers estimate that during 2014 they purchased products online for no less than EUR 15.4 billion. Swedish e-commerce consumers spent the most (nearly EUR 6 bn) in 2014, followed by Norwegian consumers (approximately EUR 3.9 bn). E-commerce value was just over EUR 3.2 billion in Denmark and approximately EUR 2.4 billion in Finland.

>> Percentage that shopped online each month (%)

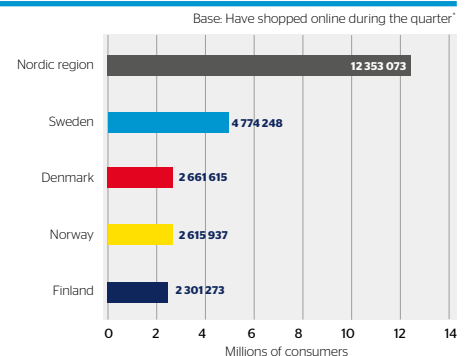


>> Main advantages of shopping online (Q4, %)



>> Average number of Nordic region consumers, per quarter, that shopped online in 2014 (Q1-Q4)

Did you purchase products online during the past three months?

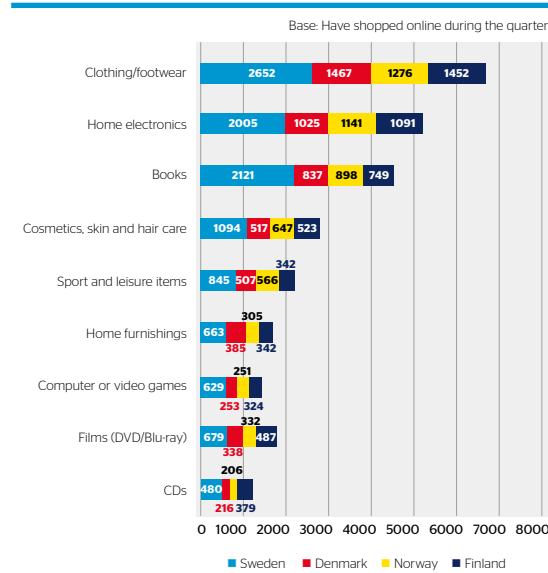


What we buy: clothing and footwear top the list

Most online purchases are of clothing and footwear, home electronics and books

The top products purchased most often by Nordic consumers online, regardless of country, are clothing and footwear. On the pan-Nordic level, the second most popular product category is home electronics. The second place spot varies between countries, however - books take second place in Sweden and home electronics in the three other Nordic countries. Other popular products are cosmetics, skin and hair care products and sport and leisure items. Among the most popular items purchased online, CDs are purchased least frequently.

>> Average number of Nordic region consumers, per quarter, that purchased products online (Q1-Q4)
Which product(s) have you purchased online in recent months?



E-commerce purchases from foreign sites in 2014 total over EUR 4 billion

Swedes and Norwegians spend the most

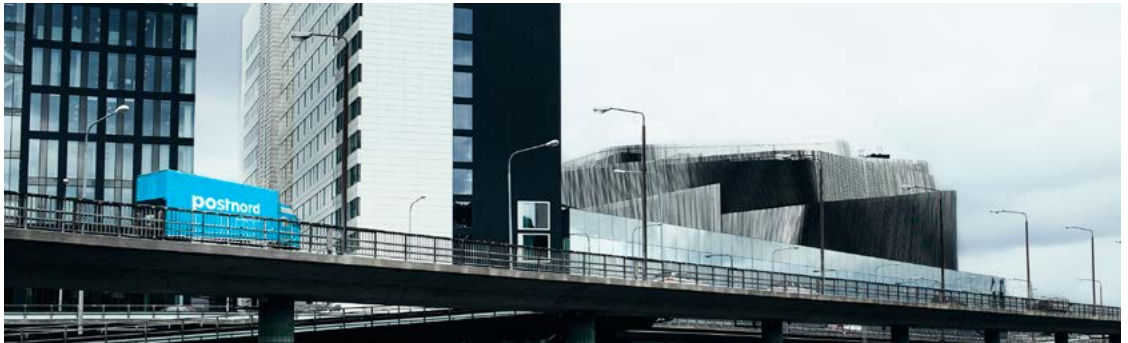
Consumers in the Nordics continue to shop online from foreign sites to a large extent. Swedes and Norwegians spend the most on online purchases from foreign sites: over EUR 1.2 billion for each country in 2014. Danish and Finnish consumers spent EUR 770 million and 961 million, respectively, on online purchases from foreign sites. E-commerce from foreign sites represented approximately 27 percent of total estimated e-commerce in the Nordics.

Online shoppers in Norway buy more per capita from foreign sites than any of their Nordic neighbors. More than half of Norwegian e-commerce consumers bought online from abroad at least once during the year. Finland is also high on this list - perhaps due

to the fact that broad selection is a key e-commerce advantage for Finns. E-commerce from foreign sites is prevalent throughout the entire Nordic region. An average of 42 percent of Nordic residents shopped online from foreign sites during each quarter in 2014.

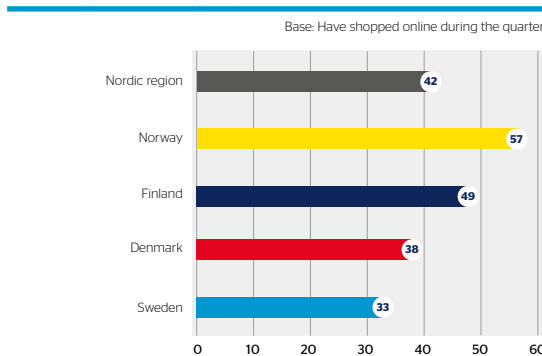
Clothing tops e-commerce from foreign sites

Just as with Nordic e-commerce as a whole, clothing tops the list in terms of e-commerce from foreign sites. On average, approximately one-third of Nordic residents shopped online from foreign sites during each quarter of 2014. Home electronics comes in second position. It is worth noting that Denmark ranks lowest in terms of shopping for home electronics from foreign sites.



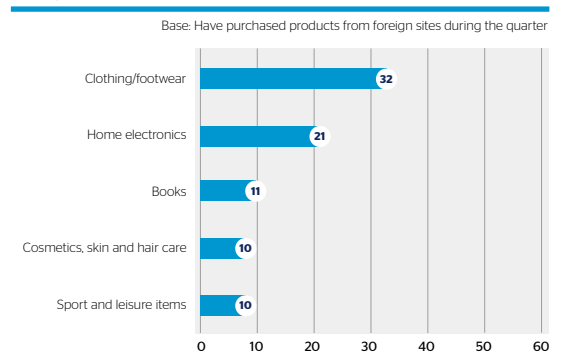
>> Average e-commerce from foreign sites per quarter (Q1-Q4, %)

Percentage of Nordic residents that purchased products online from foreign sites during the past three months



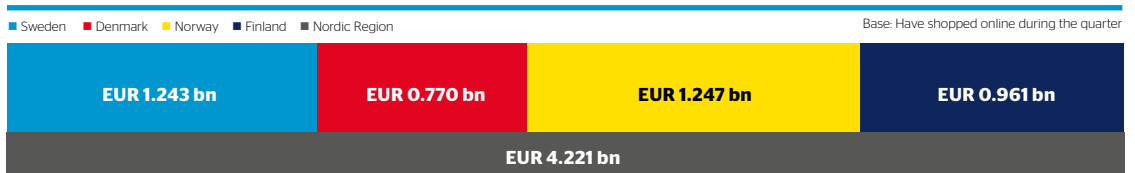
>> Products purchased from foreign sites, average (Q1-Q4, %)

What products did Nordic residents purchase from foreign sites during the past three months?



Amount spent by Nordic residents on online purchases from foreign sites (Q1-Q4)

What is the estimated value of the products you purchased online from foreign sites during the past three months?



Nordic residents prefer to shop online from the UK

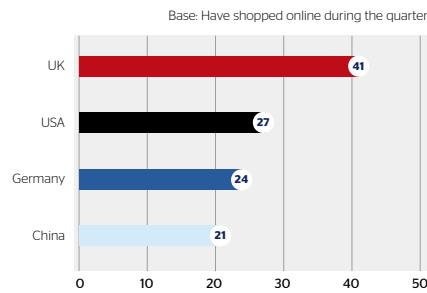
UK most popular in Denmark

When Nordic residents buy products online from foreign sites, online stores from the UK remain the most popular. On average, 41 percent of Nordic residents who shopped online from foreign sites bought from sites based in the UK - with 50 percent of Danish e-commerce consumers doing so. The USA and Germany are almost tied for second place, while China is also starting to edge up towards the same levels.

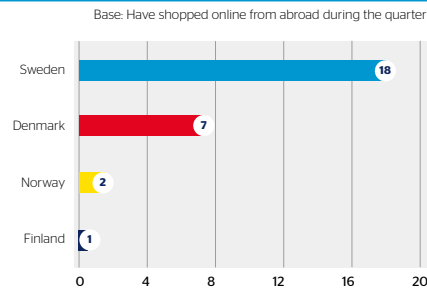
Sweden most popular among Nordic countries

Intra-Nordic e-commerce is largely directed towards Sweden. On average, 10 percent of Finns and Norwegians and 6 percent of Danes shop online from Sweden each quarter. Denmark is the second most popular Nordic country from which to purchase products online.

>> **Top 4: Countries from which all respondents purchased products online, average (Q1-Q4, %)**
From which countries have you bought products online during the past three months?



>> **E-commerce within the Nordics, average (Q1-Q4, %)**
What percentage of Nordic consumers purchased products online from each Nordic country during the past three months?



Interplay between digital and physical channels

Omni-channel still a growing trend

To achieve seamless e-commerce, it is increasingly important to meet the consumer in all available channels - commonly referred to as "omni-channel". In brief, omni-channel involves companies' integration of physical and digital channels where consumers can look for information as well as make purchases. Awareness of omni-channel is increasing among retailers in the Nordics, in parallel with consumers' heightened expectations for seamless e-commerce. Retailers are also increasingly aware of the importance of availability and logistics, including inventory. In order for seamless e-commerce to function, products need to be available in all channels.

Look or try in store before digital purchases

During the last quarter of 2014, more than one in ten Nordic residents looked at or tried on an item in-store before completing the actual purchase online. The corresponding figure in Sweden is close to one in five, perhaps because Sweden is a bit more advanced in its omni-channel philosophy than the other Nordic countries.

The products purchased in this manner by Nordic residents are primarily clothing and footwear. Finland is far above the Nordic average in this regard, but falls below the average when it comes to researching home electronics in-store prior to purchasing online.

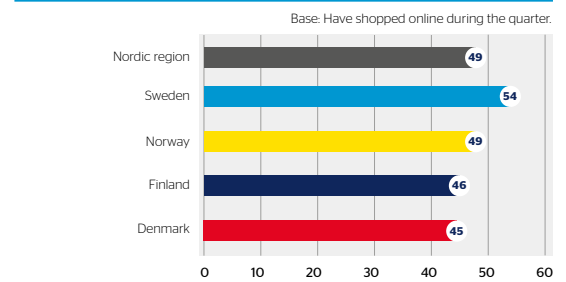
Digital research serves as basis for in-store purchases

More and more people still choose to research products online before making in-store purchases. Some consumers even research the product online while actually in the store. With today's fast smartphones and tablets, the consumer can be standing in front of the display looking at the product while simultaneously researching and comparing the product online in real time.

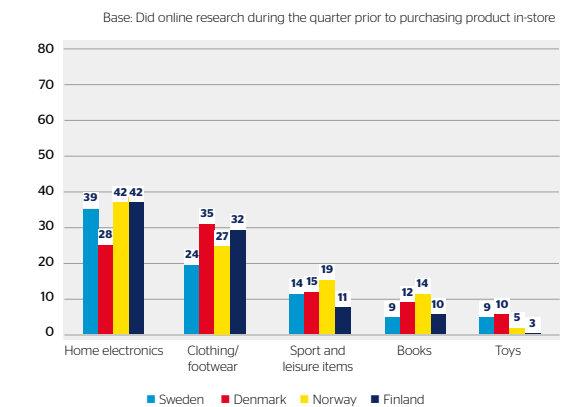
For the Nordics as a whole, home electronics is the most popular product category to purchase in this way, followed by clothing and footwear. The exception is Norway, where clothing and footwear are the category primarily being shopped for in this way.

>> Research online - shop in-store (Q4, %)

Percentage that during the past three months researched a product online before making an in-store purchase

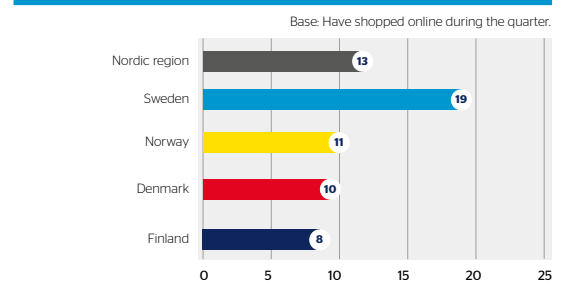


>> Products purchased in-store following online research (Q4, %)



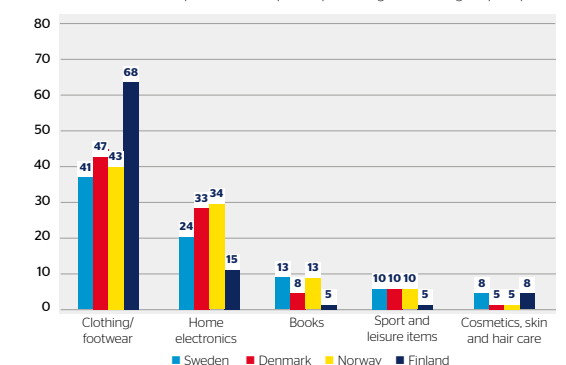
>> Look in-store and shop online (Q4, %)

Percentage that during the past three months looked at /tried on an item in-store before making an online purchase



>> Products purchased online after looking at/testing the product in-store (Q4, %)

Base: Looked at/tested product in-store prior to purchasing online during the past quarter



Debit and credit cards most popular payment method in the Nordics



Nordic residents use phones to shop

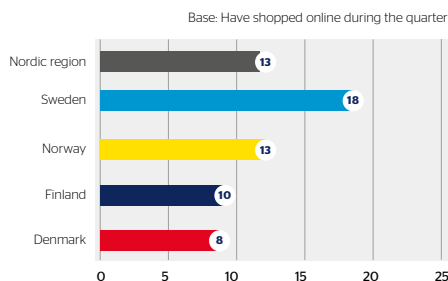
More than one in two Nordic residents stated that they shopped for goods online using their mobile phones during Q4 2014. This was particularly prevalent in Sweden, where nearly one in five shopped online from their mobile phones. This may be due to the fact that Sweden has progressed slightly further with omni-channel and that many Swedish retail chains have embraced the mobile trend and responsive sites (i.e., sites that automatically adapt to the device they're being displayed on). Denmark reports the lowest figure in the Nordics for shopping via mobile phone, perhaps because Denmark does not yet have many really large e-commerce companies - Danish companies therefore may not have responsive sites to the same extent that countries like Sweden do.

Invoices are losing ground, debit and credit cards are gaining

Generally speaking, debit and credit cards are the most popular form of payment for e-commerce transactions, and are preferred over invoices in all Nordic countries.

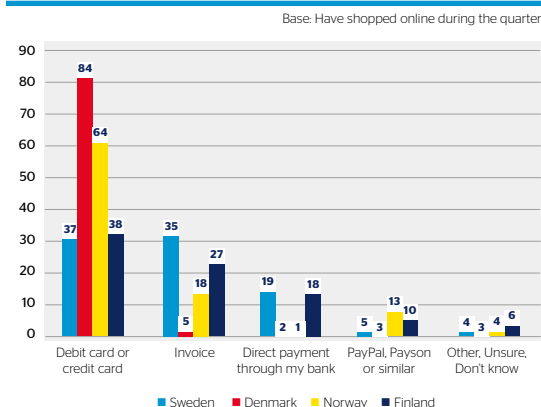
However, there is huge variation between countries in terms of the percentage of consumers who prefer to use particular payment methods. While debit and credit cards are most popular, more than twice as many Danes as Swedes prefer this payment method. Sweden and Finland, on the other hand, report much greater preference for paying directly via bank than other Nordic countries.

>> Percentage that purchased products online using mobile phone (Q4, %)



>> Most popular payment methods (Q4, %)

Which of the following methods do you prefer to use when paying for an online purchase?



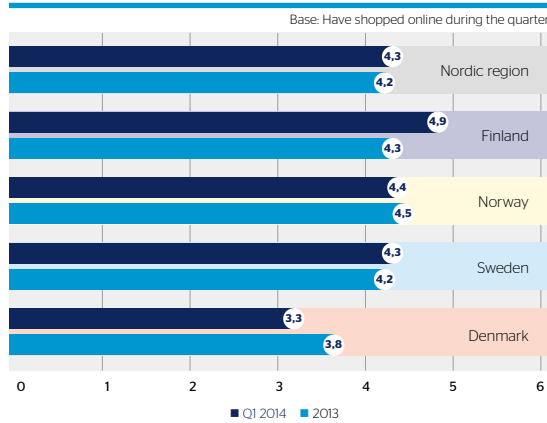
“One in ten Nordic residents used their mobile phones to purchase products online in Q4 2014”

Nordic residents expect fast deliveries

>> Delivery time expectations

(Q1, business days, number of)

When ordering a product online, what are your delivery time expectations; i.e., maximum acceptable number of business days for product delivery?



The desired delivery time is four days

Residents throughout the Nordic region want shorter delivery times. While the average acceptable delivery time is 4.3 days, the proportion of Nordic residents that expect to receive their products within 1-2 business days has increased over last year and now stands at one in ten. In Denmark, the proportion is more than two in ten. This indicates that delivery times will become increasingly tight for suppliers in the future. This in turn might be a signal to e-tailers to review their delivery alternatives and offer consumers a variety of delivery time options.

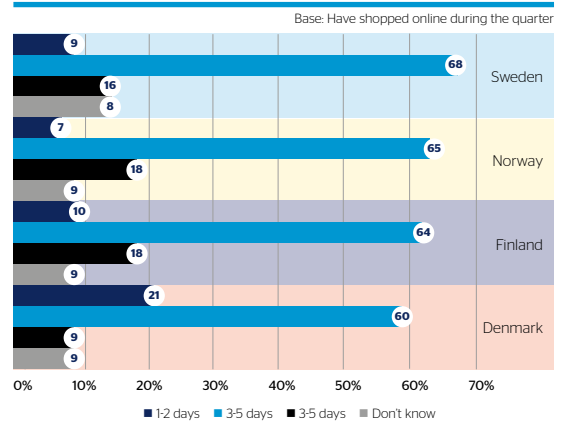
Danes demand fastest deliveries

In Denmark, a maximum of 3.3 business days is acceptable for delivery of products purchased online. Denmark is also the country where most people expect to receive their products within 1-2 business days. Both of these facts may be attributable to the

>> Delivery time expectations

(Q1, business days, %)

When ordering a product online, what are your delivery time expectations; i.e., maximum acceptable number of business days for product delivery?



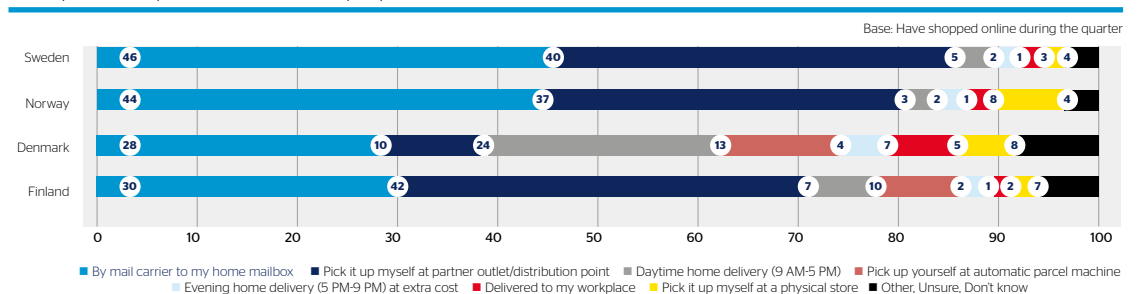
relatively short distances in Denmark as compared with other Nordic countries.

Nordic residents prefer products to be delivered to their home or a service point

Delivery preferences vary somewhat between Nordic countries, although home delivery is the most popular delivery method overall, followed by delivery to a partner outlet. Denmark stands out in terms of the percentage that prefers daytime home delivery. This may be based on the Danes' practice of pre-authorizing product delivery to an agreed location so that in-person receipt is not required. The percentage that prefers to collect products from a partner outlet is also low in Denmark, while this delivery method is widely preferred in the other Nordic countries. Survey results also show low levels of interest for higher-priced evening deliveries.

>> Most popular delivery method (Q1, %)

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





“Our vision and plan is to become a complete shopping site for Nordic consumers”

Anton Hagberg,
Manager of Komplet Nordics.

Komplett Group - successful e-tailers in the Nordics

Komplett Group started out as a youth project and became the largest e-commerce company in the Nordics. For Komplett, it is crucial that basic functions like delivery and customer service work smoothly, alongside continuous development of technology, product range and communication. Anton Hagberg, Manager of Komplett Nordics, reports on Komplett's journey, which has paralleled the development of the Nordic e-commerce market. He also shares tips on how to succeed on the Nordic market as an e-retailer.

Komplett Group - how it all began

A few young 18-20 year old guys started up a company called Norek back in 1991. They started out importing computer components, floppy disks and disk drives. The company later began a collaboration with Komplett Data, a physical store, and they eventually came up with the idea of opening an online store. Although it wasn't an obvious move (several people at the managerial level were skeptical), Komplett.no - Norway's first online store - was opened in 1996.

By modern e-commerce standards, it was a really simple online store. There was a guestbook, visitors could download a price list in PDF format and orders were placed via fax and phone and then handled manually.

Today, Komplett Group's 2014 sales have grown to EUR 797 million. Komplett.no has been Norway's biggest online store, across all sectors, since it opened

Operations:

The Nordic region's biggest e-commerce player, with 15 online shops. Acquired controlling interest in German Comtech in February 2015.

Founded:

1991 in Norway by Eric Sandtrø and Sven Aage Lysebo, among others. Started with e-commerce in 1996. Komplet.no is Norway's biggest online store.

Owner:

Canica Invest AS

CEO:

Ole Vinje

Markets:

Norway, Sweden, Denmark, Finland, Germany

Sales:

EUR 797 m

Number of employees:

700

Webshops:

Online electronics

komplet.no
komplet.se
komplet.dk
mpx.no
comtech.de

Online beauty & wellness

Blush.no

Online mother & baby

babybanden.no

Online auto parts

bildeler.no
bremsedeler.no
senk.no

Multichannel electronics

Webhallen.com

Finance & insurance

kompletforsikring.no
kompletbank.no

Challenges and future plans

"Most of our customers are and have always been men, so our greatest challenge is to get women to shop with us," says Anton Hagberg, Manager of Komplet Nordics.

Komplet is resolving this issue by working on personalization - a way of adapting the web to whoever happens to be online, producing a different look depending on who the viewer is and what preferences they have. Komplet also makes sure to determine what products and services consumers are searching for.

"We're doing a lot of work on customer insight and customer focus now, and we've been doing this for the past few years. We conduct customer surveys of a representative sample of 1,000-2,000 people to find out what the customers need," Hagberg says.

Komplet is also working intensively to identify and embrace new product groups, as well as with penetrating new sectors. Komplet Group has webshops in areas including pharmacy, banking, insurance, cosmetics, gardening and baby products.

Hagberg explains, "Our vision and plan is to become a complete shopping platform for Nordic consumers. People should be able to buy basically anything they want from us."

Komplet currently has local webshops in Norway, Sweden and Denmark and is looking to expand to Finland. The non-Nordic market is also of interest to Komplet Group. The company recently bought the German Comtech and does not rule out further expansion in a few years' time.

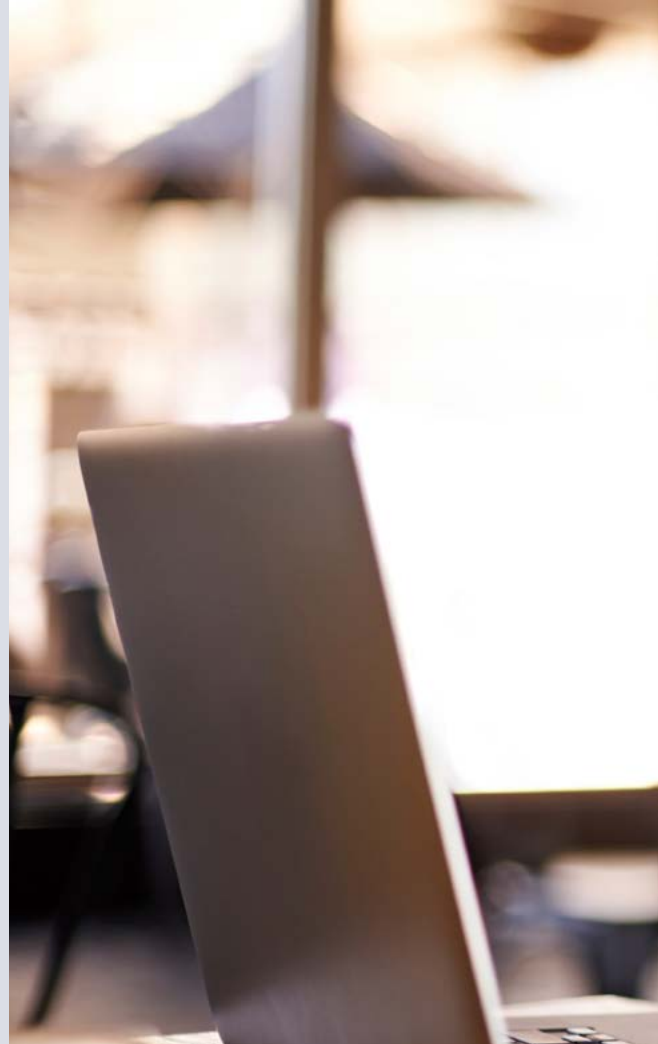
Komplet on the development of e-commerce in the Nordics

Komplet's long history in the e-commerce business provides useful insight into the way e-commerce has developed in the Nordics since the mid-1990s. For example, the trend has shifted away from young people being the primary Internet users to all age groups being active Internet users today. And this has resulted in essentially everyone - apart from the oldest age groups - using e-commerce to purchase products.

According to Hagberg, "This is largely due to the high level of security for e-commerce. We have extremely secure payment methods in the Nordics, as well as legislation on return and cancellation rights. There are no longer any barriers to online shopping."

The Nordic market

Anton Hagberg finds it a little difficult to talk about the Nordics as one single market.



"At Komplet, while we do think in Nordic terms, I am absolutely convinced that you also need to think locally. There are cultural differences and there are differences in communication trends. There are also differences in the types of products that are relevant in different markets. You need to know all of this to succeed in the individual countries," he says.

Komplet tries to adapt to its various markets to the greatest extent possible in terms of its communication and the products it highlights. The company also has other strategies.

"It's good to have a physical presence in the country where you're operating," continues Hagberg. "Komplet.se for instance, is located in downtown Gothenburg and Komplet.dk in downtown Copenhagen. I think this is absolutely crucial to our ability to get a feeling for what consumers want. We need to understand what's relevant locally, have a media mix in our marketing, know the target groups in each market and have customer service in the local language. That's our strategy when it comes to being Nordic, but still local."

What's the next big trend?

"Shopping with a mobile phone is clearly becoming a really big thing. We're working on and developing this ourselves at the moment. Otherwise, I don't think



“There are no longer any barriers to online shopping”

there will be any obvious major advances. I think innovations are always made through the continuous evolution of small, simple things.”

Hagberg also predicts development in the areas of delivery methods and the way people search for and find products - and he thinks these will become key competitive factors.

“Social media will also remain important, and that’s one area where we can’t really predict how things will develop. We just need to keep up. Customer communication in general needs to be constantly developing. We need to be continuously tinkering with and testing new ways of communicating. It’s a never-ending journey,” he says.

Komplett’s top tips for e-tailers

What’s the secret of your success as an e-retailer?

Well, above all, we got a very early start. We were also bold, and tested new things early on. Some things worked and others didn’t. And we developed good systems and had a huge focus on the basics - delivery, logistics and customer service.

Anton Hagberg’s three tips for e-tailers on the Nordic market.

Anton Hagberg’s three tips for e-tailers on the Nordic market

1. Get mobile e-commerce in place. If you don’t have a good mobile solution within the space of a few years, I think you’ll be out of the game.
2. Concentrate on the basics: good delivery, good product info, good customer service - it’s extremely important.
3. Local adaptation. Nordic residents are quite similar, but we want to be treated differently.

Sweden



» Population (aged 18-79)	7,130,000
» Percentage of population with Internet access	93%
» Percentage of population that purchased products online in 2014	84%
» Percentage of population that purchased products online at least once per month	35%
» Percentage of population that purchased products online from foreign sites in 2014	33%
» Percentage of population that purchased products online using a mobile phone in Q4 2014	18%
» Average maximum number of business days e-commerce consumers are willing to wait for delivery in Q1 2014	4.3
» Total estimated value of online purchases in 2014	EUR 5.9 bn

Swedes spent EUR 6 billion on online purchases in 2014

Among Nordic countries, Sweden spends the most on online purchases

Swedes spent a full EUR 5.9 billion on online purchases in 2014. Compared with other Nordic countries, Sweden spent the largest reported amount on e-commerce in 2014 and the second most on e-commerce per capita. Only Norwegians spent more per capita.

Clothing and footwear favorites for Swedish e-commerce consumers

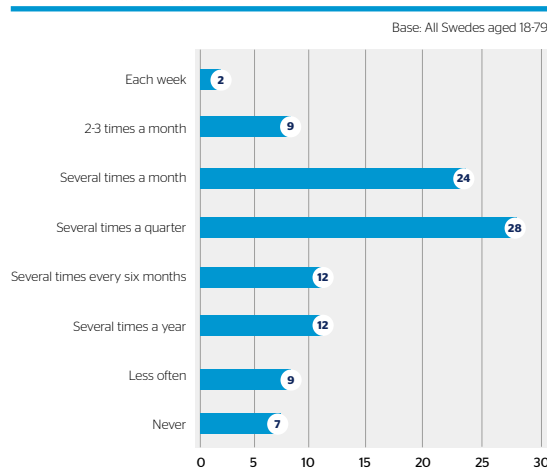
Like other Nordic residents, Swedes bought mostly clothing and footwear online in 2014. Approximately 40 percent of Swedes shopped online for clothing or footwear during each quarter of the year. After clothing and footwear, books and home electronics were the most popular product categories.

35 percent of Swedes purchase products online each month

E-commerce continues to be an important part of everyday life for many Swedes. More than one-third (35 percent) of all Swedes purchase products online at least once a month and over six in ten (63 percent) do so at least once a quarter.

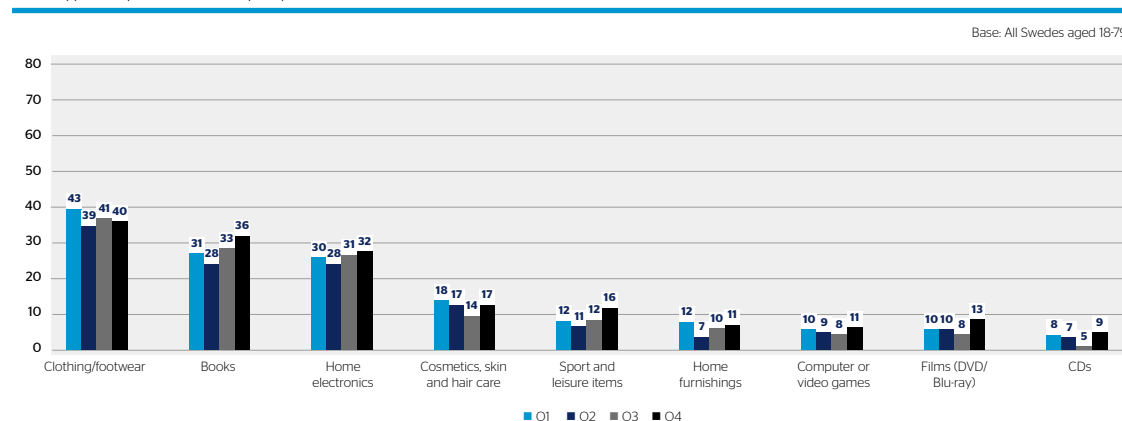
>> How often Swedes shop online (%)

How often do you buy products online?



>> Favorite products among Swedish online shoppers (Q1-Q4, average, %)

What types of products have you purchased online in recent months?



Swedes spent EUR 1 billion shopping online from foreign sites

When Swedes make cross-border online purchases, they do so most often from UK sites. The USA, Germany and China are also popular countries among Swedish e-commerce consumers.



One in three Swedes shops online from foreign sites

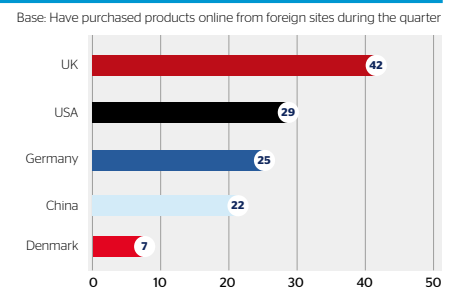
On average, 33 percent of Swedes purchased products from foreign sites during each quarter of 2014. The total value of e-commerce purchases from abroad was approximately EUR 1.2 billion during 2014, accounting for 21 percent of total e-commerce during the year. Clothing was the most popular product bought by Swedes online from foreign sites, followed by home electronics and books.

Shopping from UK sites is most popular

When Swedes make cross-border online purchases, they do so most often from UK sites. The USA, Germany and China are also popular countries among Swedish e-commerce consumers. Swedes purchase relatively little from sites in other Nordic countries. Denmark - the most popular Nordic country for Swedish online purchase from foreign sites - accounts for only 7 percent of cross-border e-commerce per quarter.

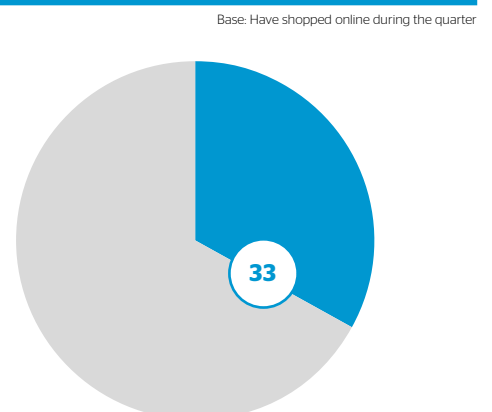
>> Top 5: Countries from which Swedes prefer to shop online (Q1-Q4, average, %)

From which foreign countries have you bought products online during the past three months?



>> How many purchased products online from foreign sites (Q1-Q4, average, %)

Percentage that purchased products online from foreign sites during the past three months



Interplay between physical and digital channels

One in two Swedes researches online before buying in-store

Just over half of all Swedish e-commerce consumers state that they researched a product online before purchasing it in a physical store at least once during Q4 2014. Home electronics is the most common product category among Swedes for pre-purchase online research. Swedes also use this method often when purchasing clothing and footwear as well as sports and leisure items.

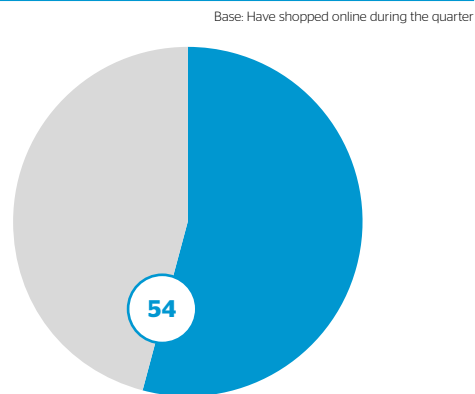
Almost one in five Swedes opted for the opposite method during Q4 2014 - previewing the product in-store before making an online purchase. Swedes do this more often than any of their Nordic neighbors, which may indicate that Swedish sites have progressed furthest in adapting to mobile devices. The product categories Swedes preview in-store before making online purchases are clothing and footwear, home electronics and books.

Debit and credit cards overtake invoicing

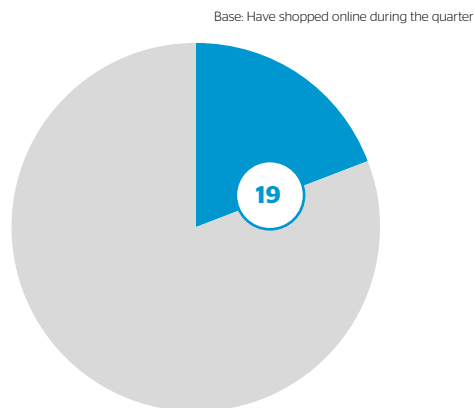
Most Swedish e-commerce consumers prefer using debit or credit cards when paying for their products. Paying via invoice is the second most popular method, followed by direct bank payment.



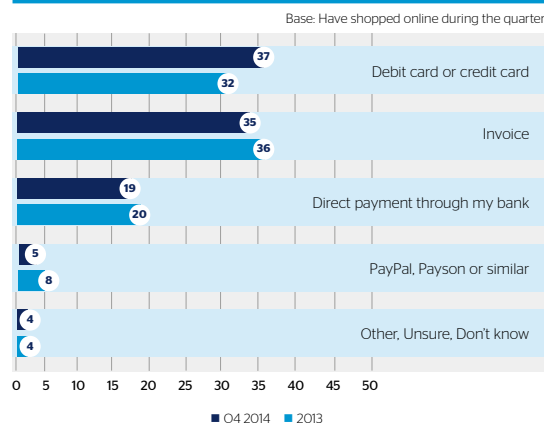
» Online research before in-store purchase (Q4, %)
During the past three months, have you researched a product online before purchasing it in a store?



» Percentage that previews the product in-store (Q4, %)
During the past three months, have you looked at/tried on an item in-store before purchasing it online?



» Most popular payment method (Q4, %)
Which of the following methods do you prefer to use when paying for an online purchase?



Swedes expect fast deliveries

40 percent want their items delivered within three business days

Swedish e-commerce consumers expect fast deliveries - two in five want their products delivered within three business days. A full 16 percent, however, would consider waiting more than six business days for delivery. On average, Swedish e-commerce consumers would consider waiting up to four days or so for product delivery.

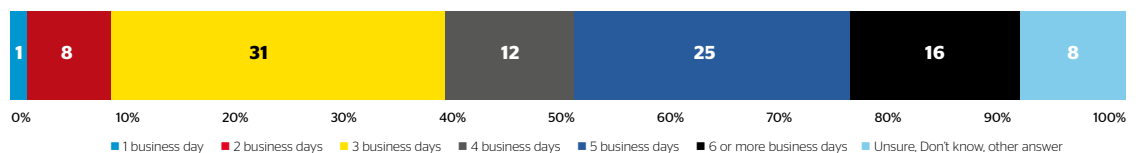
“Two in five want their products delivered within no more than three days”



>> Swedes' delivery time expectations (Q1, %)

When you have purchased a product online, what are your delivery time expectations; i.e., maximum acceptable number of business days for product delivery?

Base: Have shopped online during the quarter



“Swedish e-commerce consumers prefer using a debit or credit card when paying for their online purchases.”



Denmark



» Population (aged 18-79)	4,180,000
» Percentage of population with Internet access	90%
» Percentage of population that purchased products online in 2014	87%
» Percentage of population that purchased products online at least once per month	39%
» Percentage of population that purchased products online from foreign sites in 2014	38%
» Percentage of population that purchased products online using a mobile phone in Q4 2014	8%
» Average maximum number of business days e-commerce consumers are willing to wait for delivery in Q1 2014	3.3
» Total estimated value of online purchases in 2014	EUR 3.2 bn

Danes shop online most often

Danes spent EUR 3.2 billion on online purchases

Danes spent EUR 3.2 billion on online purchases in 2014. Per capita, Danes spent more than Finns but less than Swedes and Norwegians. The same applies to the total amount spent on online purchases in 2014 - Danes took third place among Nordic countries.

One in three Danes shops online several times a month

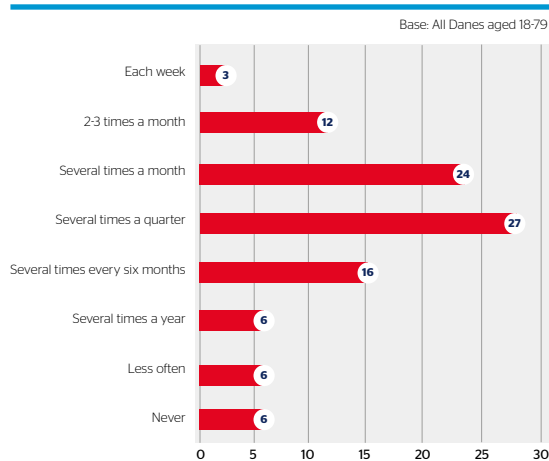
Danes purchase products online more frequently than their Nordic neighbors. Nearly two in five Danes purchase products online at least once a month. 66 percent of Danes do so at least once each quarter - 26 percentage points higher than the equivalent figure for Finland.

Clothing and footwear most popular

Clothing and footwear are by far the most popular product category for Danish e-commerce consumers. During Q2 and Q3 2014, two in five Danes bought clothing or footwear online. The second most popular product categories for online purchases among Danes were books and home electronics.

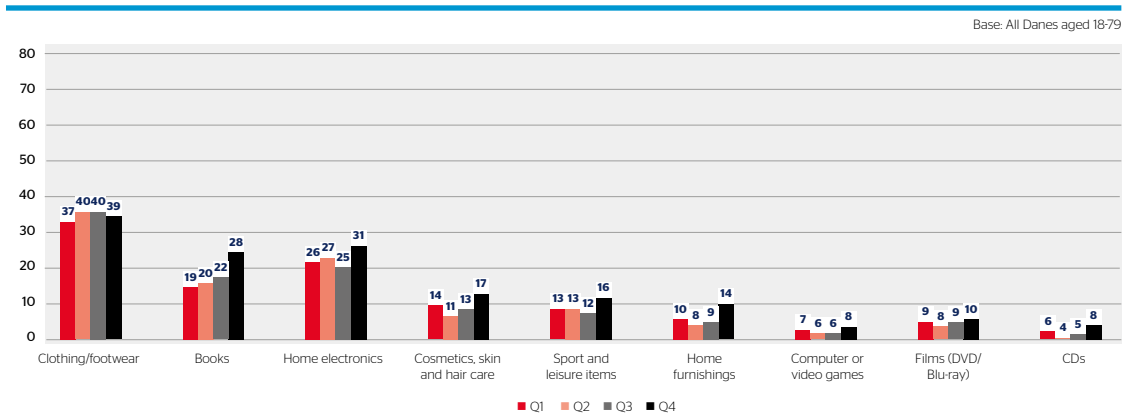
>> How often Danes shop online (%)

How often do you buy products online?



>> Favorite products among Danish online shoppers (Q1-Q4, average, %)

What types of products have you purchased online in recent months?



Danes spent EUR 770 million shopping online from foreign sites

Danes purchase products online less frequently from other Nordic countries - when they do so, Sweden is the most popular market.



Just over one in three Danes shops online from foreign sites

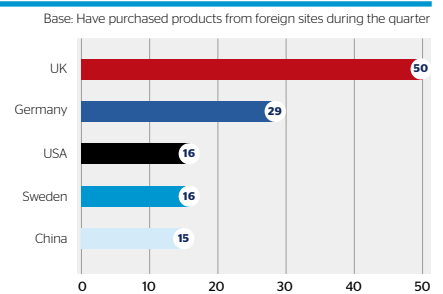
On average, 38 percent of Danes purchased products online from foreign sites during each quarter of 2014. The total value of Danes' e-commerce spend from abroad was EUR 770 million in 2014, accounting for 24 percent of total e-commerce spend for the country. Clothing and footwear, books and home electronics were the most popular product categories for Danes' online purchases from foreign sites during the year.

UK webshops most popular among Danes

When Danes shop online from foreign sites, they do so most often from UK sites. German sites are the second most popular among Danes, followed by the USA and China. Danes purchase products online less frequently from other Nordic countries - when they do so, Sweden is the most popular market.

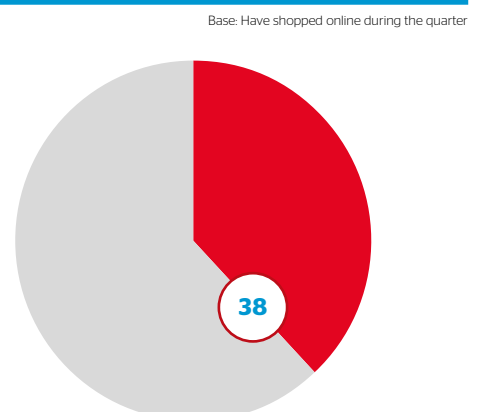
>> Top 5: Countries from which Danes prefer to shop online (Q1-Q4, average, %)

From which foreign countries have you bought products online during the past three months?



>> How many purchased products online from foreign sites (Q1-Q4, average, %)

Percentage that purchased products online from foreign sites during the past three months



Common to do research online before buying in-store

45 percent of Danes research online before purchasing in-store

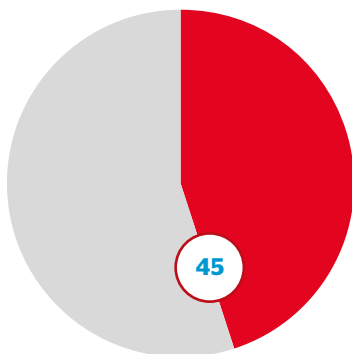
During Q4 2014, nearly 50 percent of Danes researched a product online before purchasing it in a physical store. Clothing and footwear is the most common product category among Danes for pre-purchase online research. Home electronics and sport and leisure articles are other product categories that Danes often research online prior to in-store purchase.

Very few did the opposite - i.e., trying on or previewing a product in-store before making an online purchase when the price was lower or the right size available. Only one in ten Danes used this method. Danes who researched products in-store prior to online purchase most often bought clothing, footwear or home electronics.

» Online research before in-store purchase (Q4, %)

During the past three months, have you researched a product online before purchasing it in a store?

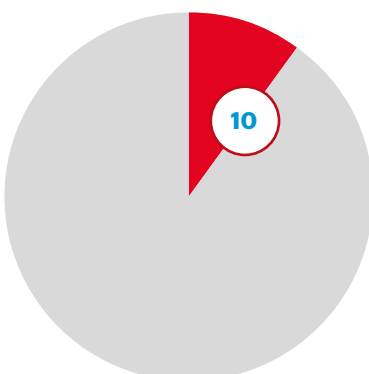
Base: Have shopped online during the quarter



» Percentage that previews the product in-store (Q4, %)

During the past three months, have you looked at /tried on an item in-store before purchasing it online?

Base: Have shopped online during the quarter



Debit and credit cards dominate

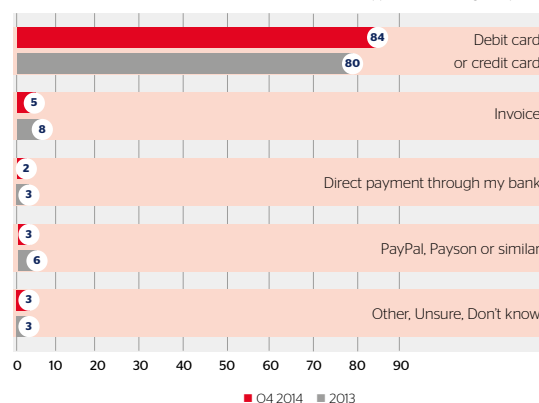
When Danes purchase products online, their preferred payment method is debit or credit card. During Q1 2014, 84 percent of Danish e-commerce consumers stated that they preferred to pay by debit or credit card, with only 5 percent preferring to pay via invoice.



» Most popular payment method (Q4, %)

Which of the following methods do you prefer to use when paying for an online purchase?

Base: Have shopped online during the quarter

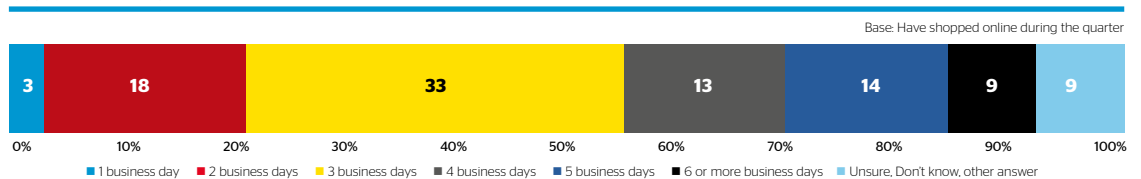


High expectations for fast deliveries



>> Danes' delivery time expectations (Q1, %)

When you have purchased a product online, what are your delivery time expectations; i.e., maximum acceptable number of business days for product delivery?



Danes most impatient - over 50 percent expect product delivery within three business days

Danes have the Nordic region's highest expectations for fast deliveries. More than one in two Danish e-commerce consumers expect their products to be delivered within no more than three days. Only 9 percent of Danes would consider waiting more than six business days for delivery of products purchased online. On average, Danes are willing to wait a maximum of three business days for product delivery - one business day less than the average in Sweden and Norway, and nearly two business days less than the average in Finland.

“Over 50 percent of Danish e-commerce consumers expect their products to be delivered within no more than three days”

“Danes who researched products in-store prior to online purchase most often bought clothing, footwear or home electronics.”





Norway



» Population (aged 18–79)	3,707,000
» Percentage of population with Internet access	97%
» Percentage of population that purchased products online in 2014	82%
» Percentage of population that purchased products online at least once per month	36%
» Percentage of population that purchased products online from foreign sites in 2014	57%
» Percentage of population that purchased products online using a mobile phone in Q4 2014	13%
» Average maximum number of business days e-commerce consumers are willing to wait for delivery in Q1 2014	4.4
» Total estimated value of online purchases in 2014	EUR 3.9 bn

Norwegians spend the most per capita shopping online

Per capita, Norwegians spend the most on online purchases

Norwegians estimate that they spent a total of EUR 3.9 billion on online purchases in 2014 - the most per capita among Nordic countries. Norwegians as a whole also spend more than Danes on online purchases, despite having a smaller population. Among Nordic countries, only Sweden spends more on online purchases overall.

62 percent of Norwegians buy products online every quarter

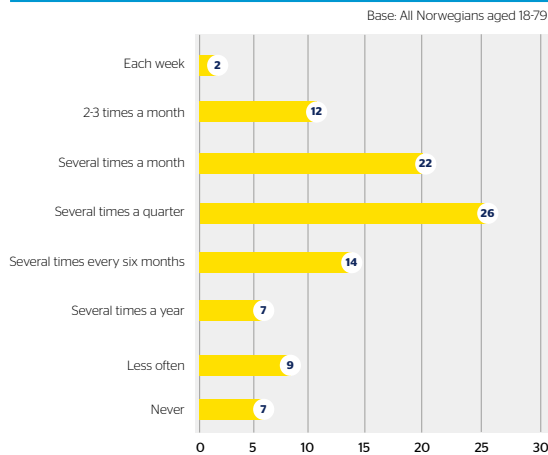
E-commerce is an important feature of everyday life for many Norwegians. 36 percent of Norwegians purchase products online at least once a month and far more than half (62 percent) do so at least once each quarter.

Clothing and footwear top the list for Norwegians

Clothing and footwear are the most popular product category for Norwegians' online purchases. Approximately 40 percent of Norwegians purchased clothing or footwear online during the year. Books and home electronics were also popular product categories for Norwegians' online purchases.

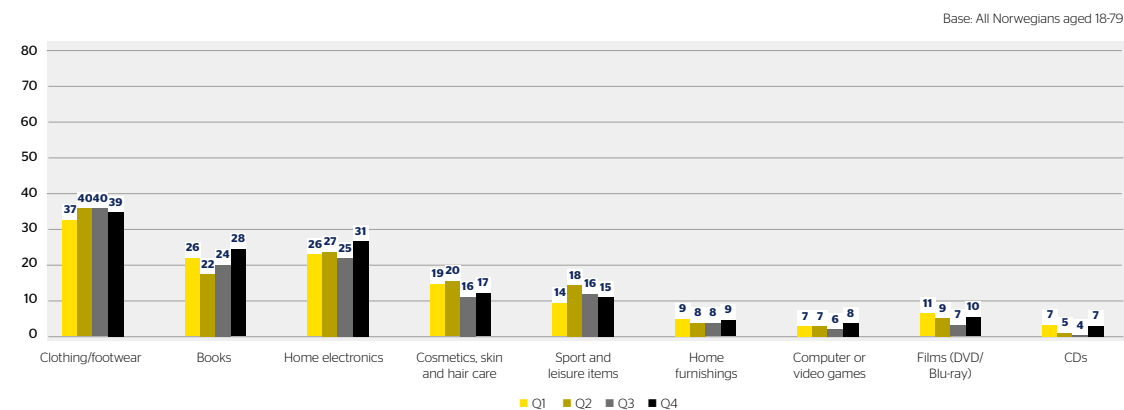
>> How often Norwegians shop online (%)

How often do you buy products online?



>> Favorite products among Norwegian online shoppers (Q1-Q4, average, %)

What types of products have you purchased online in recent months?



Norwegians spent EUR 1 billion shopping online from foreign sites

Norwegians making online purchases from other Nordic countries do so most often from Swedish sites, followed by Danish sites.



One in two Norwegians shop online from foreign sites

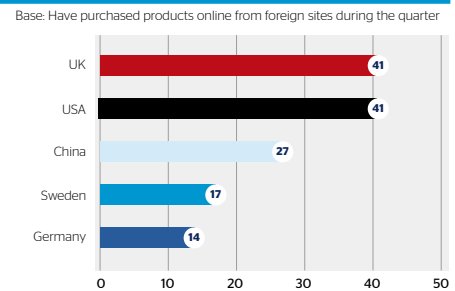
On average, 57 percent of Norwegians bought products online from foreign sites during each quarter of 2014. The total value of Norwegians' e-commerce from abroad was EUR 1.2 billion, 33 percent of total e-commerce. Clothing and footwear was the most popular product category for Norwegians' online purchases from foreign sites, followed by home electronics and books.

UK and USA sites most popular among Norwegians

When Norwegians' make cross-border online purchases, they do so most often from UK and USA webshops. China is also popular among Norwegian e-commerce consumers, who shop from Chinese sites more often than any of their Nordic neighbors. When buying products online from other Nordic countries, Norwegians do so most often from Swedish sites, followed by Danish sites.

>> Top 5: Countries from which Norwegians prefer to shop online (Q1-Q4, average, %)

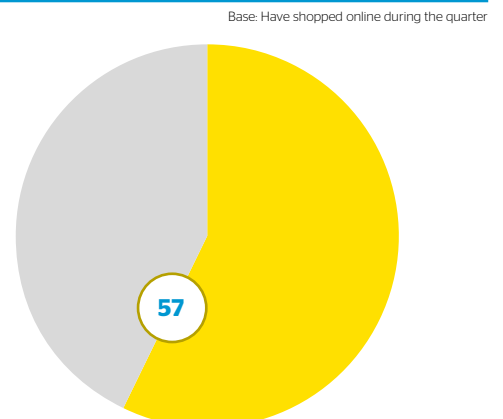
From which foreign countries have you bought products online during the past three months?



>> How many purchased products online from foreign sites

(Q1-Q4, average, %)

Percentage that purchased products online from foreign sites during the past three months



Digital and physical interplay

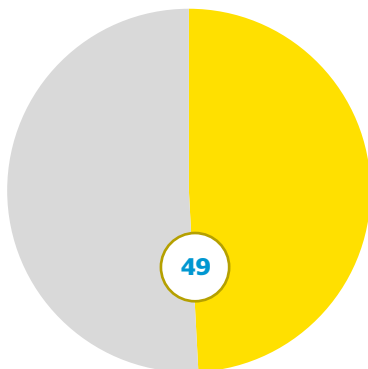
Half of Norwegians research online before purchasing in-store

During Q4 2014, 50 percent of Norwegian e-commerce consumers researched a product online before purchasing it in a physical store. Home electronics is the most common product category among Norwegians for pre-purchase online research. Norwegians also use this method often when purchasing clothing and books.

It is not as common for Norwegians to preview a product in-store before making an online purchase – only 11 percent do so. The product categories that Norwegians preview in-store before making online purchases are clothing, home electronics and books.

» Online research before in-store purchase (Q4, %)
During the past three months, have you researched a product online before purchasing it in a store?

Base: Have shopped online during the quarter



Debit and credit cards common in Norway

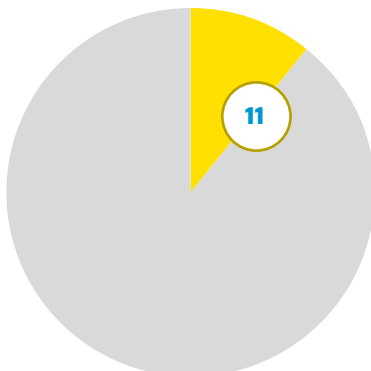
Debit and credit cards hold a strong position as a preferred payment method among Norwegians. Paying via invoice or via PayPal, Payson or similar is the second most popular payment method.



» Percentage that previews the product in-store (Q4, %)

During the past three months, have you looked at /tried on an item in-store before purchasing it online?

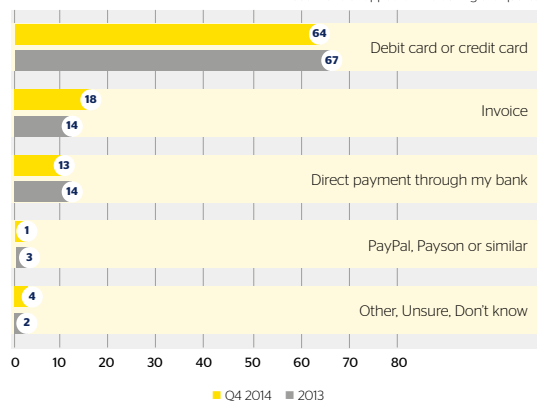
Base: Have shopped online during the quarter



» Most popular payment method (Q4, %)

Which of the following methods do you prefer to use when paying for an online purchase?

Base: Have shopped online during the quarter



Expect fast deliveries

One in three Norwegians wants their products delivered within three business days

Norwegian e-commerce consumers demand fast deliveries - one-third want their products delivered within three business days. Only 18 percent would consider waiting more than six business days for delivery. On average, Norwegians would consider waiting no more than four days or so for product delivery.

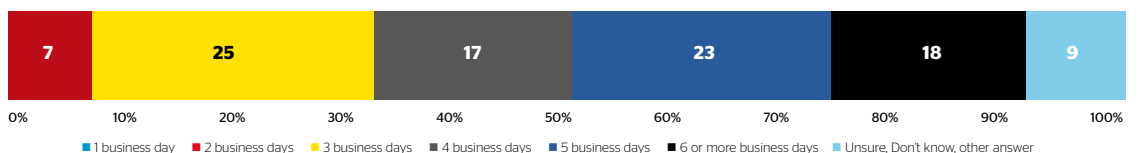
“One-third of Norwegians want their products delivered within three business days”



>> Norwegians' delivery time expectations (Q1, %)

When you have purchased a product online, what are your delivery time expectations; i.e., maximum acceptable number of business days for product delivery?

Base: Have shopped online during the quarter



A man and a woman are sitting at a desk, looking at a laptop. The man is on the left, wearing a blue sweater and a tie, and is smiling. The woman is on the right, wearing a dark grey sweater, and is also smiling with her hand resting on her chin. The laptop is open in front of them. The background is a blurred view of a city or town through a window.

“After debit and credit cards, Norwegians prefer to pay via invoice”

Finland



» Population (aged 18–79)	4,056,000
» Percentage of population with Internet access	89%
» Percentage of population that purchased products online in 2014	76%
» Percentage of population that purchased products online at least once per month	20%
» Percentage of population that purchased products online from foreign sites in 2014	49%
» Percentage of population that purchased products online using a mobile phone in Q4 2014	10%
» Average maximum number of business days e-commerce consumers are willing to wait for delivery in Q1 2014	4.9
» Total estimated value of online purchases in 2014	EUR 2.4 bn

Finns shop online less frequently

Finns spend the least on online purchases

Among Nordic residents, Finns spend the least on online purchases - overall as well as per capita. Even so, Finns report that they spent a total of EUR 2.4 billion on online purchases in 2014.

20 percent of Finns shop online each month

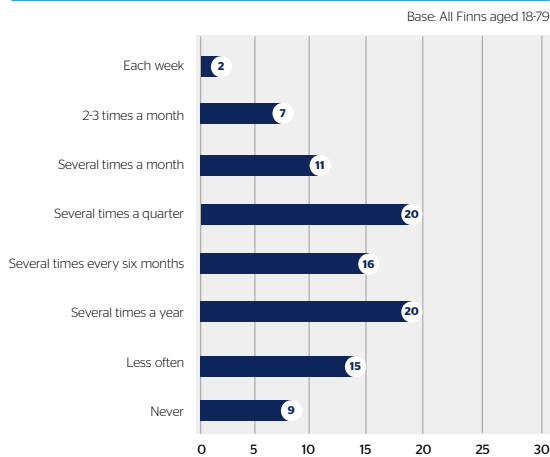
Finns shop online less frequently than all of their Nordic neighbors. One-fifth (20 percent) of Finns purchase products online at least once per month, while 40 percent of Finns shop online at least once per quarter.

Clothing and footwear most popular

Clothing and footwear top the list of products Finns purchase online. Apart from Q1 2014, approximately 40 percent of Finns shopped online for clothing and shoes each quarter. After clothing and footwear, home electronics and books are the most popular product categories for Finnish e-commerce consumers.

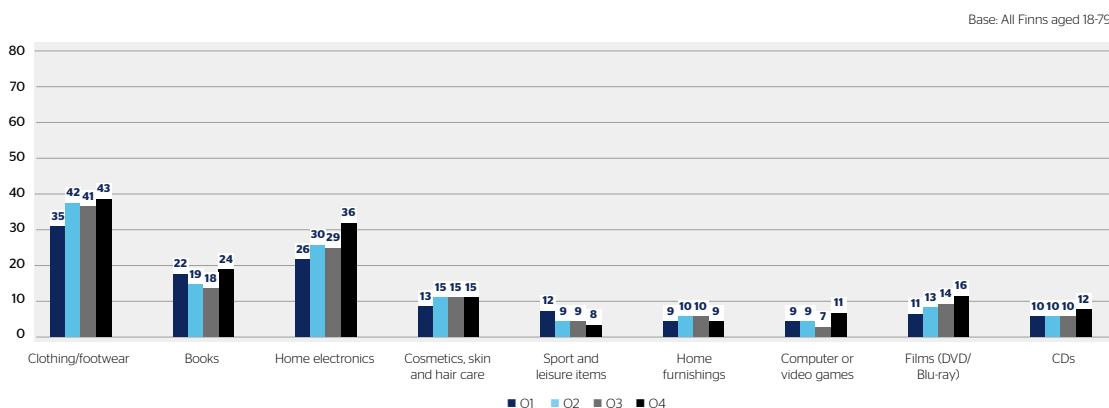
>> How often Finns shop online (%)

How often do you buy products online?



>> Favorite products among Finnish online shoppers (Q1-Q4, average, %)

What types of products have you purchased online in recent months?



Finns spent EUR 961 million shopping online from foreign sites

Finns making online purchases from other Nordic countries do so most often from Swedish sites.



One in two Finns shopped online from foreign sites

On average, 49 percent of Finns purchased products from foreign sites during each quarter of 2014. The total value of e-commerce from abroad was EUR 961 million in 2014, accounting for a full 40 percent of total Finnish e-commerce during the year - the largest percentage in the Nordic region.

Clothing, home electronics, cosmetics, and hair and skin care products were the most popular products for Finns' online purchases during the year.

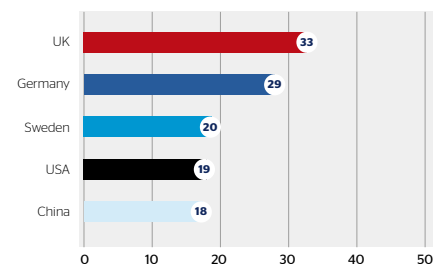
Shopping from UK and German sites most popular

When Finns purchase products online from foreign sites, they do so most often from UK and German sites, followed by sites from the USA and China. Finns making online purchases from other Nordic countries do so most often from Swedish sites.

>> Top 5: Countries from which Finns prefer to shop online (Q1-Q4, average, %)

From which foreign countries have you bought products online during the past three months?

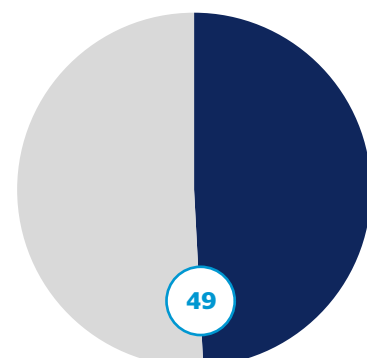
Base: Have purchased products from foreign sites during the quarter



>> How many purchased products online from foreign sites (Q1-Q4, average, %)

Percentage that purchased products online from foreign sites during the past three months

Base: Have shopped online during the quarter



Digital and physical interplay

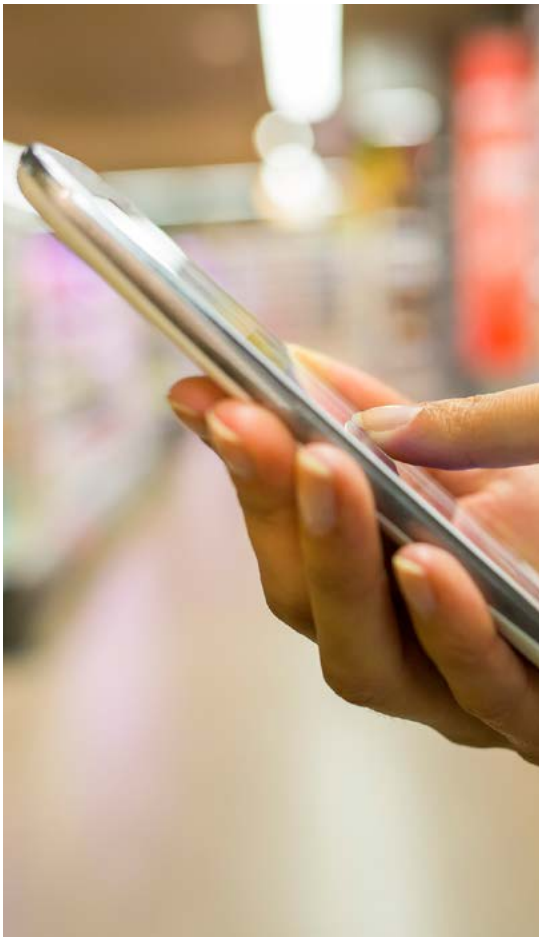
Nearly 50 percent of Finns research online before purchasing in-store

46 percent of Finns researched a product online prior to making an in-store purchase during Q4 2014. Home electronics is the most popular product category among Finns for pre-purchase online research, followed by clothing and footwear and books.

Very few Finns - 8 percent - preview an item in-store prior to purchasing it online. Those who do so most often purchase clothing or footwear.

Debit and credit cards more common than invoice

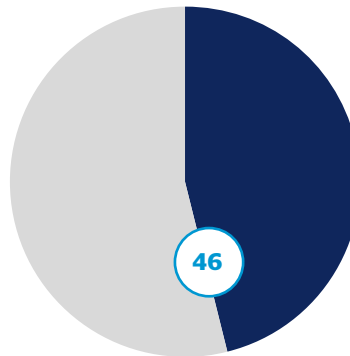
Finnish online shoppers prefer to use debit or credit cards when paying for online purchases. Paying via invoice is the second most popular method. Direct bank payment is also a relatively popular payment method among Finns, preferred by nearly one in five online shoppers.



>> Online research before in-store purchase (Q4, %)

During the past three months, have you researched a product online before purchasing it in a store?

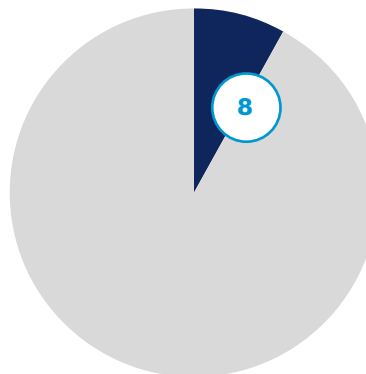
Base: Have shopped online during the quarter



>> Percentage that previews the product in-store (Q4, %)

During the past three months, have you looked at/tried on an item in-store before purchasing it online?

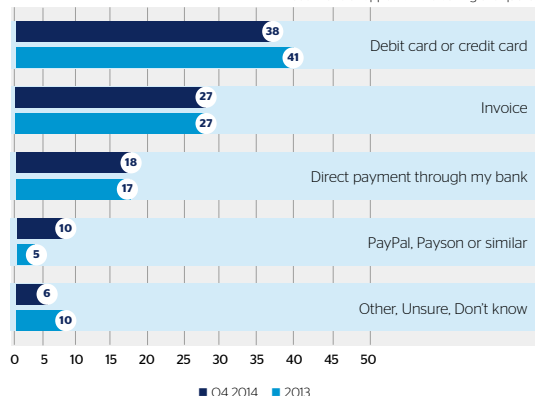
Base: Have shopped online during the quarter



>> Most popular payment method (Q4, %)

Which of the following methods do you prefer to use when paying for an online purchase?

Base: Have shopped online during the quarter



Nordic region's lowest expectations for delivery time

One in four want their item delivered within three business days

Finns have the Nordic region's lowest expectations for delivery time. Only one-quarter of Finnish e-commerce consumers expect to receive their products within three business days, and a full 27 percent would consider waiting more than six business days for delivery. On average, Finns would consider waiting up to five days or so for product delivery - nearly two days more than Danes would be willing to wait.

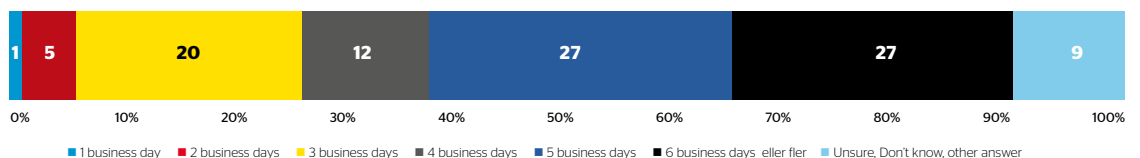
“A full 27 percent of Finns would consider waiting more than six business days”



>> Finns' delivery time expectations (Q1, %)

When you have purchased a product online, what are your delivery time expectations; i.e., maximum acceptable number of business days for product delivery?

Base: Have shopped online during the quarter



**“46 percent of
Finns researched
products
online before
purchasing
in-store”**



Annemarie Gardshol,
Head of E-commerce
& Corporate Clients
at PostNord.



What responsive players need in a fast-paced industry

The Nordic e-commerce market continues to grow and develop at breakneck speed. Suppliers face the challenge of reaching the right target groups with their products. Consumers and suppliers alike are placing higher demands for well-oiled e-commerce machinery that enables products to be shipped between the parties with ease. PostNord plays a key role in the evolution and development of this industry.

The Nordic e-commerce market has matured substantially in recent years. Strong annual growth of around 15 percent has enticed many companies to add online sales to their offering. With this trend, the boundaries between physical and digital shopping are being wiped out - providing an opening for new, exciting ways for companies to reach their customers.

In step with the market's vigorous growth, competition is increasing in terms of attracting increasingly discerning e-commerce consumers. To be a serious contender on the Nordic market, a company needs to have access to well-functioning communication and logistics solutions. PostNord is heavily committed to being the top communication and logistics player in the Nordics by delivering innovative solutions and a world-class shopping experience.

Annemarie Gardshol, Head of E-commerce and Corporate Clients at PostNord, says, "We've reorganized and have added a team that is working full-time on developing and accelerating PostNord's e-commerce offering. The focus of this work is analyzing trends, generating insight into consumer and supplier needs and developing new concepts for our customers. We work very closely with the customer and the consumer in everything we do."

The expanding e-commerce market has made rapid growth possible for many e-tailers - although achieving correspondingly profitable growth has been challenging. To simplify things for its customers, PostNord has developed communication solutions that help companies identify and attract new customers at lower cost. E-tailers have also started to meet challenges on the logistics side.

“New categories of products are continually being introduced on the e-commerce market - including food and pharmacy products. This presents logistical challenges,” Gardshol says. “We work continuously in these areas to ensure that good delivery solutions are in place for all types of products.”

Looking at the US and UK e-commerce markets, it's obvious that the Nordic market still has great potential and will continue to develop. Nordic e-commerce consumers will place heavy demands in terms of simplicity, flexibility and freedom of choice as regards the point of delivery. Traditional sales and marketing strategies are being challenged on an increasingly digital market.

Gardshol explains, “E-tailers will need to work even harder with issues like building loyalty amongst customers who are starting to switch to digital shopping venues. Procedures and policies for attracting customers during the complex online decision-making process will be a central issue for e-tailers to address in the future.”

We simplify things for Nordic e-tailers by regularly conducting market research and customer surveys - which places PostNord at the forefront and allows us to provide customers with the best possible offering. A fast-paced industry in constant flux requires players that are responsive and quick to pick up on new trends.

The parcel station concept is firmly established in Denmark. Both Sweden and Denmark offer solutions for home food delivery. Norway has a well-developed home delivery concept that includes add-on services, and a mailbox delivery service has been launched.

“Seamless, cross-border offerings will be extremely important for us”



Looking at the US and UK e-commerce markets, it's obvious that the Nordic market still has great potential and will continue to develop.

“Providing seamless, cross-border offerings will be extremely important for us as we strive to be the foremost player in Nordic logistics,” Gardshol says.

Clearly, the Nordic e-commerce market will see a continuation of this powerful growth in coming years. By continuing to build a strong Nordic infrastructure, PostNord intends to drive the sector forward and deliver innovative logistics and communication solutions that contribute to e-tailers' business and provide a positive shopping experience for consumers.

Gardshol concludes, “There's only one way of making this market grow, and that's to maintain constant focus on the end-consumer in our production of new solutions.”

Detailed results

Consumers in the Nordic region who have Internet access in 2014 (%)

Size of population (18-79) in Nordic countries

Sources: scb.se, 2013/Statistikbanken.dk, 2013/ssb.no, 2013/tilastokeskus.fi, 2013

Sweden	7,130,000
Denmark	4,180,000
Norway	3,707,000
Finland	4,056,000

Percentage of population with Internet access

Source: Internet World, 2012

Sweden	93%
Denmark	90%
Norway	97%
Finland	89%

Number of residents with Internet access

Base: All*

Sweden	4,774,248
Denmark	2,661,615
Norway	2,615,937
Finland	2,301,273

* The base "all" is defined as the proportion of the population between 18-79 who have Internet access. Calculation of the number of individuals is based on the country's population aged 18-79, weighted against Internet penetration in that country. The total number of individuals aged 18-79 with Internet access was then multiplied by the proportion who selected each response to the survey questions.

Total e-commerce during 2014

What is the estimated value of the products you purchased online during the past three months? Total for 2014

Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
Total, national currency	SEK 54.762 bn	DKK 23.973 bn	NOK 32.825 bn	EUR 2.399 bn	
Total, EUR	EUR 5.932 bn	EUR 3.217 bn	EUR 3.883 bn	EUR 2.399 bn	EUR 15.432 bn
Average EUR per person (18-79)	EUR 832	EUR 770	EUR 1.047	EUR 591	

Main advantages of shopping online (Q4)

What is the single most important advantage of purchasing products online rather in a traditional store??

Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
Easier*	53%	50%	48%	41%	49%
I can shop whenever it suits me	30%	33%	29%	27%	30%
Time-saving	9%	10%	11%	8%	9%
More convenient	14%	7%	8%	6%	10%
Cheaper	23%	19%	24%	24%	23%
Bigger and better selection	16%	13%	18%	21%	17%
Other, Unsure, Don't know	8%	14%	10%	14%	11%

* The options "I can shop whenever it suits me", "Time-saving" and "More convenient" have been consolidated into "Easier".

Top products purchased online by Nordic residents, 2014 (Q1-Q4)

Which item/goods did you purchase online during the past three months? Multiple responses possible				
Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland
Clothing/footwear	41%	39%	36%	40%
Books	32%	22%	25%	21%
Home electronics	30%	27%	32%	30%
Cosmetics, skin and hair care	17%	14%	18%	15%
Sport/leisure articles	13%	14%	16%	10%
Home furnishings	10%	10%	9%	10%
Computer or video games	10%	7%	7%	9%
Films (DVD/Blue-ray)	10%	9%	9%	14%
CDs	7%	6%	6%	11%

Percentage of population that looked at/tried on an item in-store before purchasing it online, 2014 (Q4)

During the past three months, have you looked at/tried on an item in-store before purchasing it online? Percentage responding "yes".					
Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
Yes	19%	10%	11%	8%	13%

Percentage of population that looked at/tried on an item in-store before purchasing it online, 2014 (Q4)

Which item/goods did you purchase online during the past three months? Multiple responses possible				
Base: During the past three months, have looked at an item in-store before purchasing it online	Sweden	Denmark	Norway	Finland
Clothing/footwear	41%	47%	43%	68%
Home electronics	24%	33%	34%	15%
Books	13%	8%	13%	5%
Sport and leisure items	10%	10%	10%	5%
Cosmetics, skin and hair care	8%	5%	5%	8%

Percentage of population that researched a product online before purchasing it in-store, 2014 (Q4)

During the past three months, have you researched a product online before purchasing it in a store? Percentage responding "yes".					
Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
Yes	54%	45%	49%	46%	49%

Percentage of population that researched a product online before purchasing it in-store, 2014 (Q4)

During the past three months, what type(s) of products did you research online before purchasing in a traditional store?				
Base: During the past three months, have researched a product online before purchasing it in-store	Sweden	Denmark	Norway	Finland
Home electronics	39%	28%	42%	42%
Clothing/footwear	24%	35%	27%	32%
Books	9%	12%	14%	10%
Sport and leisure items	14%	15%	19%	11%
Toys	9%	10%	5%	3%

Fast deliveries increasingly important (Q1)

When you have purchased a product online, what are your delivery time expectations; i.e., maximum acceptable number of business days for product delivery?

Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
1 business day	1%	3%	0%	1%	1%
2 business days	8%	18%	7%	5%	9%
3 business days	31%	33%	25%	20%	28%
4 business days	12%	13%	17%	12%	13%
5 business days	25%	14%	23%	27%	23%
6 business days	6%	1%	3%	3%	4%
7 business days	5%	3%	11%	15%	8%
8 business days	5%	5%	4%	9%	6%
Don't know	8%	9%	9%	9%	9%
Average	4.3 business days	3.3 business days	4.4 business days	4.9 business days	4.3 business days

Preferred delivery alternatives (Q4)

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

Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
By mail carrier to my home mailbox	46%	28%	44%	30%	39%
Pick it up myself at partner outlet/distribution point	40%	10%	37%	42%	34%
Daytime home delivery	5%	24%	3%	7%	9%
Pick up yourself at automatic parcel machine		13%		10%	
Evening home delivery at extra cost	2%	4%	2%	2%	2%
Delivered to my workplace	1%	7%	1%	1%	2%
Pick it up myself at a physical store	3%	5%	8%	2%	4%
Other, Unsure, Don't know	4%	8%	4%	7%	5%

E-commerce from abroad (Q1-Q4)

During the past three months, have you purchased a product online from a foreign site? "Foreign site" refers to an online store that, in your view, has an address or legal domicile outside of your country.

Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
Yes	33%	38%	57%	49%	42%

Total e-commerce from abroad 2014 (Q1-Q4)

Base: Have shopped online during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
Total, national currency	SEK 11.465 bn	DKK 5.735 bn	NOK 10.498 bn	EUR 0.961 bn	
Total, EUR	EUR 1.243 bn	EUR 0.770 bn	EUR 1.247 bn	EUR 0.961 bn	EUR 4.221 bn

E-commerce from abroad (Q1-Q4)

Which item/goods have you purchased online from foreign sites during the past three months?

Base: Have purchased products online from foreign sites during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
Clothing/footwear	32%	31%	26%	37%	32%
Home electronics	20%	18%	22%	24%	21%
Books	9%	15%	14%	9%	11%
Cosmetics, skin and hair care	8%	8%	13%	10%	10%
Sports and leisure articles	11%	9%	10%	7%	10%

E-commerce from abroad (Q1-Q4)

From which countries have you bought products online during the past three months?

Base: Have purchased products online from foreign sites during the quarter	Sweden	Denmark	Norway	Finland	Nordic region
UK	42%	50%	41%	33%	41%
USA	29%	16%	41%	19%	27%
Germany	25%	29%	14%	29%	24%
China	22%	15%	27%	18%	21%
Sweden		16%	17%	20%	18%
Denmark	7%		13%	3%	7%
Norway	2%	2%		2%	2%
Finland	1%	0%	1%		1%



PostNord and e-commerce

PostNord is the leading supplier of communication and logistics solutions to, from and within the Nordic region. We also ensure postal delivery service to private individuals and companies in Sweden and Denmark. With our expertise and a strong distribution network, we are developing a platform for tomorrow's communication, e-commerce, distribution and logistics in the Nordic region. In 2014 the Group had sales of EUR 4.3 billion and 38,000 employees.

PostNord is the largest and the obvious partner for e-commerce on the Nordic market. We have a comprehensive offering with a variety of services in the areas of distribution, notification, marketing and customer communication.

We make everyday life easier for e-commerce companies. With the widest-ranging distribution network in the Nordic region, we shrink the distance between e-commerce and the end-customer. PostNord has 5,800 distribution points spread quite evenly across Sweden, Denmark, Norway and Finland. In Sweden and Denmark, our postal workers visit all households and companies every working day.

PostNord's Direct Link offering provides distribution solutions to and from 192 countries. We help e-commerce companies from all over the world who want to do business on the Nordic market with everything from market analysis to direct marketing and distribution solutions.



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