

# E-commerce Delivery Compass

2026 EDITION



SAMPLE  
**8000**  
respondents

QUESTIONS  
**25+**

MARKETS COVERED  
**8 countries**  
NL DE BE FR AT UK ES IT





<b>About the report</b>	02
<b>Key findings</b>	05
<b>Chapter 1: The shopping landscape</b>	07
<b>Chapter 2: What shoppers actually want at checkout</b>	11
<b>Chapter 3: The conversion killer: What drives customers away</b>	18
<b>Chapter 4: The post-purchase experience</b>	23
<b>Chapter 5: Returns</b>	30
<b>Chapter 6: The global shopping shift</b>	36
<b>Conclusion: From insights to action</b>	42

# About the report

---

E-commerce Delivery Compass - Sendcloud 2026



## Delivery has a new job description

For a long time, e-commerce retailers treated delivery as the final step in a transaction. It was just something that happened after the real work of conversion was done. As long as orders were shipped on time and costs were controlled, it was considered good enough.

That model has broken down.

Delivery now influences whether a shopper completes a purchase at checkout, how they experience your brand in the days after buying, and whether they come back. It is no longer downstream from conversion; it is part of it. And to meet the expectations of today's European shopper, every additional option, promise, or service comes with operational cost and complexity. Merchants now have to navigate competing priorities, such as customer experience, efficiency, and margin, which are difficult to optimise all at once.

The consumer insights we provide in this report help you decide which actions to prioritise and where you can afford to make trade-offs without a huge impact on customer experience. Those actions and trade-offs all add up to your unique shipping formula for success.

## The consumer pillar of the Shipping Formula

To understand what those trade-offs can look like, we surveyed 8,000 online shoppers across 8 European markets (the Netherlands, Belgium, France, Germany, Austria, Italy, Spain, and the United Kingdom). We asked them what they expect at checkout, where they abandon, what builds loyalty after a parcel arrives, and what makes them stop ordering entirely.

What we found is that consumers are constantly willing to make certain trade-offs themselves when it comes to delivery. Their behaviour reveals the variable that you, as an e-commerce retailer, need to get right. Those variables are what we call the Shipping Formula: the right balance between what consumers expect, what operations can support, and what the business can sustain.

This report is the consumer pillar of that formula. It gives you **everything you need to create your own ideal shipping formula.**



00

Key findings



# Key findings



## Home delivery still leads. But not by much.

54.66% used home delivery in the past 3 months, but 45.34% used a service point, parcel locker, or local shop. Out-of-home delivery now accounts for nearly half the market.

## Surprise costs at checkout kill more conversions than slow delivery.

40.70% abandon a cart because delivery costs are higher than expected. 27.06% leave because delivery is slower than expected. Customers are generally willing to pay and wait for delivery, as long as you are up-front and consistent about it.

## Speed gets attention. Reliability wins.

26.56% say arriving on time makes the biggest difference between an acceptable and a great delivery. Only 19.72% say the same about fast delivery. Speed of delivery is not as important as doing what you promised.

## The courier owns the communication. The retailer owns the blame.

56.86% prefer to receive delivery updates from the couriers. But 42.46% hold the online store responsible when something goes wrong. You can outsource the communication to couriers, but your company is still accountable to customers.

## Delivery failures can be the end of a customer relationship.

29.06% decided not to reorder from a store after one delivery-related problem. That means nearly 1 in 3 customers have ended their relationship with a retailer over a failure that was, in most cases, the courier's fault. When something goes wrong, and no one steps up to fix it, customers stop ordering from the retailer.

## International demand is already there. Delivery friction is the only thing standing in the way.

64% of Europeans already shop internationally. Unexpected costs, unclear delivery timelines, and complicated returns remain the top barriers to doing it more. International growth depends on how well you remove the specific, solvable barriers that make international shoppers hesitate.

# 01

Chapter 1

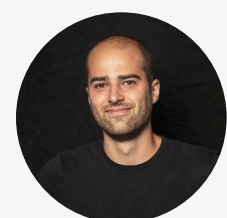
# The shopping landscape



## Where Europeans buy and what that means for merchants

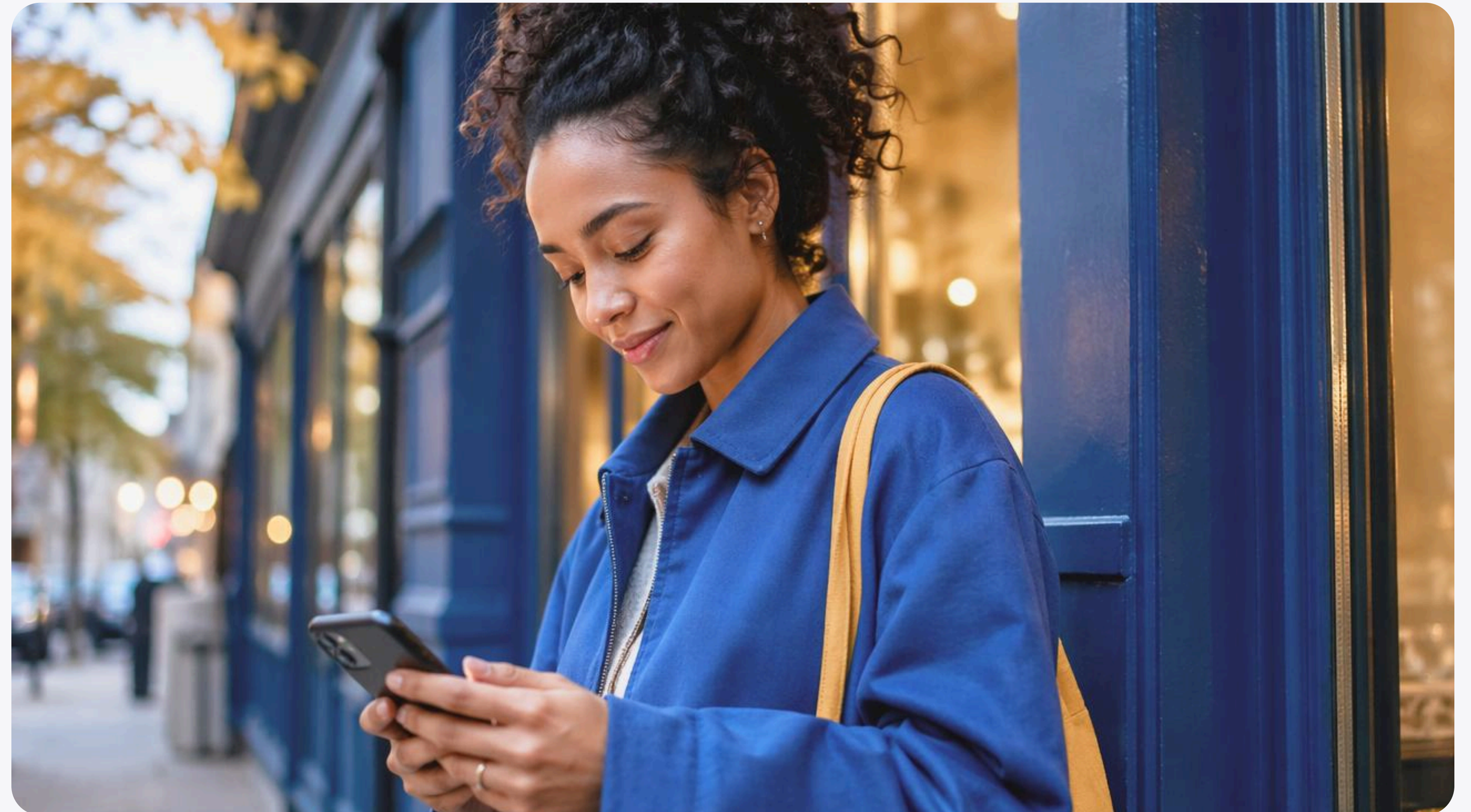
Every delivery experience starts before a parcel leaves the warehouse. It starts with where and why a consumer decides to shop.

E-commerce has become a much more competitive game. Consumer expectations keep getting higher, while brands have more competition than ever. **We built this research to help merchants** understand what shoppers across Europe actually expect today, and how to **adapt faster and keep growing.**



**Rob van den Heuvel**

CEO & Co-founder at Sendcloud





## Marketplaces are setting the bar

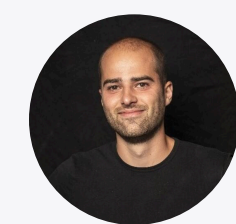
49.58% of European shoppers shop primarily at marketplaces. Retailer websites trail at 34.30%.

The UK shows just how far this can go: 92.70% of UK shoppers use marketplaces. That's nearly double the European average. They're used to shopping on platforms that provide fast delivery, frictionless returns, and instant price comparison as standard. To appeal to those customers, UK retailers have to live up to the standards that marketplaces set.

Not every market looks like the UK, though. Belgium (44.24%) and the Netherlands (38.23%) show the lowest marketplace usage in the survey. In these markets, retailer-owned channels still carry real weight. But local payment preferences (Bancontact, iDEAL) are non-negotiable there: 32.59% of Belgian shoppers and 31.16% of Dutch shoppers abandon baskets when the right payment method isn't available.

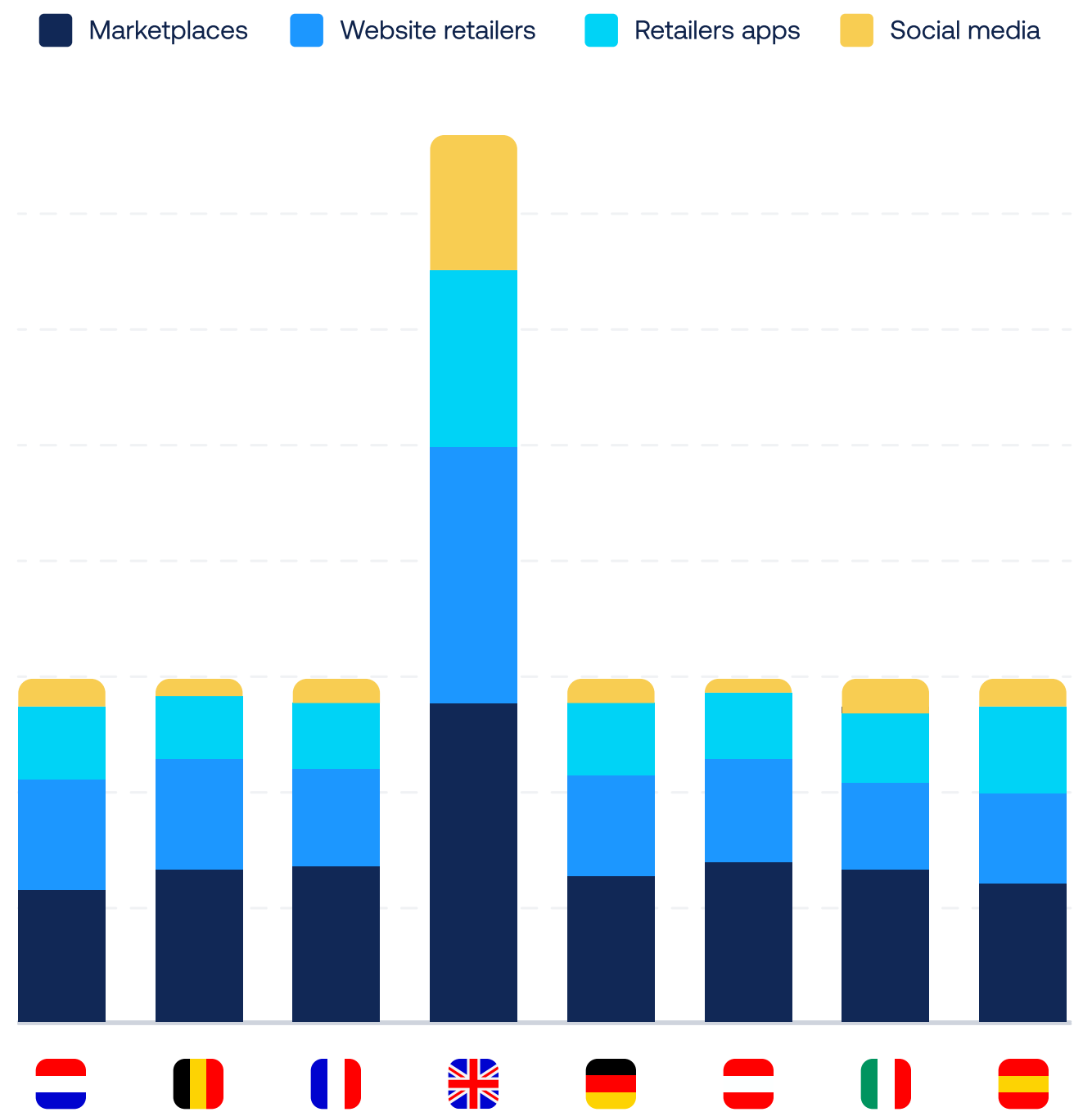
## Marketplaces changed customer expectations fast.

### Free shipping, easy returns, delivery transparency... customers expect all of it by default now. That's the level every ecommerce brand starts from in 2026.



**Rob van den Heuvel**  
CEO & Co-founder at Sendcloud

### Where do Europeans shop online?





## Price sensitivity is up, even among high spenders

Most European shoppers spend €51–300 per month online (≈58% globally). The UK is well above the average, with 37% spending more than £301-500 monthly (the highest rate in the survey).

Yet 75.05% of European shoppers say inflation has made them more price-sensitive. In France and the UK, that number rises above 82%. Even high spenders say they also keep a closer eye now on additional costs during checkout, such as delivery fees.

**≈58%**  
of global shoppers spend  
€51–300/month online

**75.05%**  
of European shoppers say inflation  
made them more price-sensitive

**13.45%**  
of UK shoppers spend £301+/  
month — highest in the survey

### High-spend shoppers (€301+/month): UK vs Europe



### Shoppers saying inflation increased their price sensitivity



## AI is already part of how shoppers decide where to buy

43.04% of European shoppers have used AI to find where to buy a product. Among those who have used shopping AI, 18.75% say it directly influenced their final decision. A further 30.80% haven't used it yet but would consider it. Only 26.16% are actively uninterested

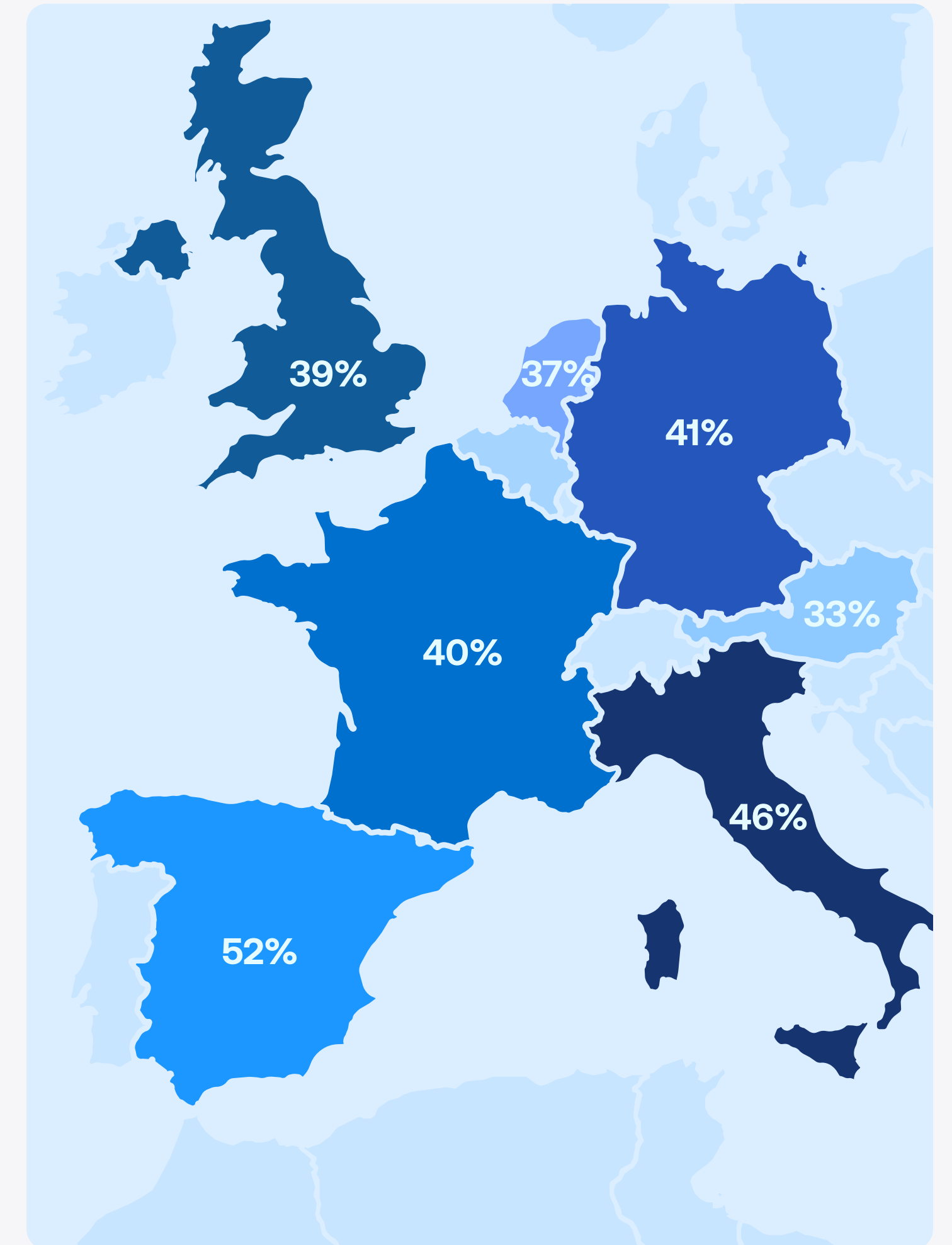
Nearly three in four European shoppers are either already **using AI in their purchase journey or open to doing so.**

When it comes to retail AI and shipping, we asked consumers whether they had specifically used AI to decide where to buy based on delivery-related factors like speed, cost, or available options. Here's what they said:

- 12.59% use it regularly
- 27.43% use it occasionally
- 34.94% are aware it's possible but haven't tried it yet
- 25.03% were not aware this was possible

We also found a connection between delivery-sensitivity and AI adoption. Spain (52.34%) and Italy (46.11%), the markets most sensitive to delivery issues, are leading AI adoption, with AI significantly influencing purchase decisions. Shoppers affected by poor delivery are the most driven to use AI to prevent it.

For merchants, the practical implication is straightforward: AI tools can only recommend what they can read. Retailers with accurate, structured, transparent delivery information (specific ETAs, clear option descriptions, upfront costs) are more likely to rank high when a shopper asks an AI where to buy. That means it's worth investing time in creating the same transparency that already drives conversion with human shoppers.



Chapter 2

# O2

# What shoppers actually want at checkout

## The delivery choice architecture

Delivery decisions are made in seconds at checkout. But the preferences behind them are consistent, measurable, and (for merchants who understand them) highly actionable.

This chapter covers what European shoppers actually want: the trade-offs they make, where home delivery ends and out-of-home begins, how long they're willing to wait, and what it takes to turn a delivery option into a completed purchase.

For consumers, payment and delivery are one continuous motion – if either process stalls, the entire transaction breaks down. To keep sales flowing, **you have to treat them as a single, unified experience.**



**Marcus Granström**

VP and General Manager at Mollie



## Cost wins. Every time. (But there's a catch.)

The single most consistent finding in this year's study: when forced to choose, European shoppers pick price over speed, control, and sustainability.

**71.76%** choose free delivery over paid next-day

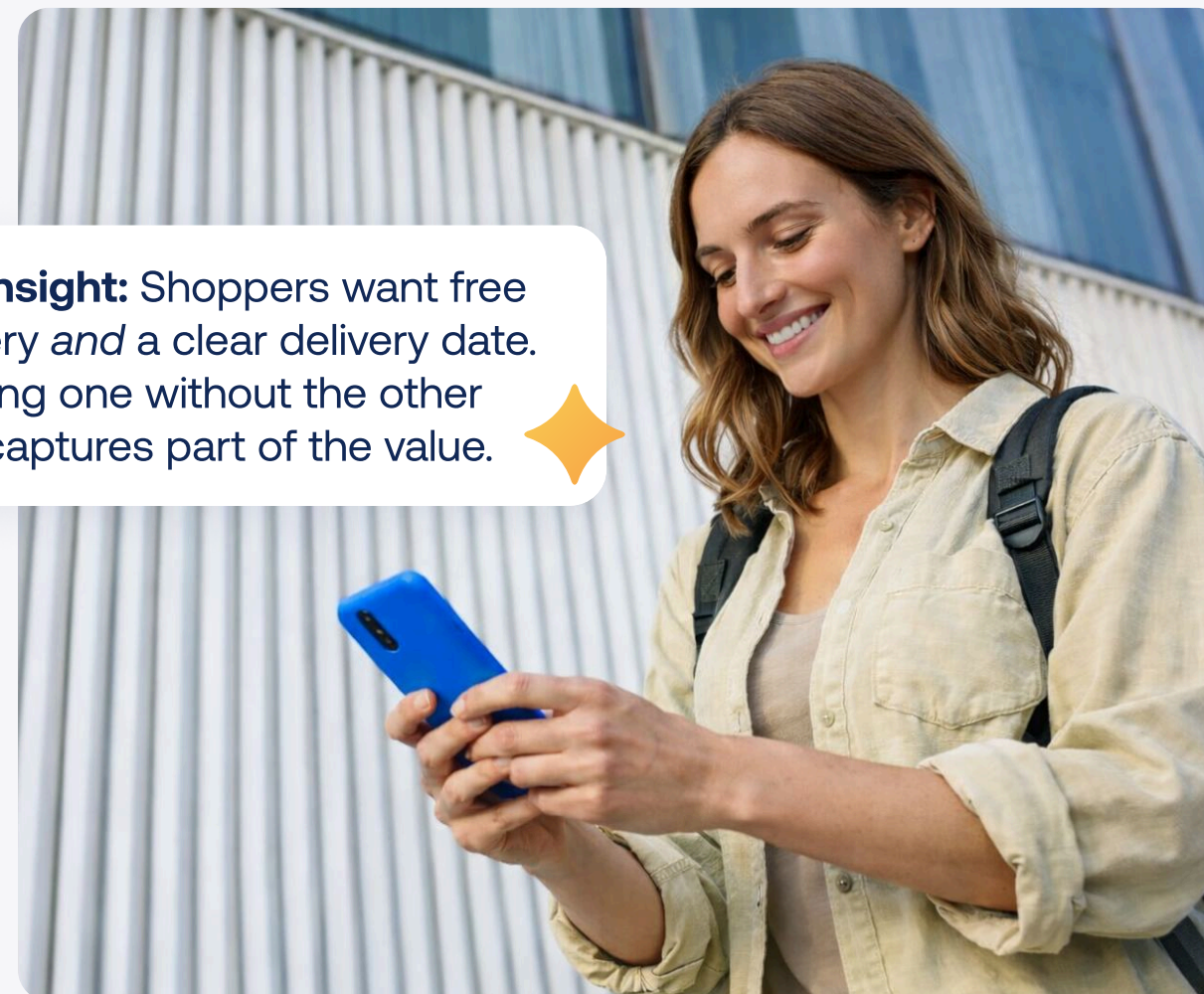
**75.88%** are willing to wait longer to avoid delivery fees

**83.74%** prefer free home delivery over a paid choice of location

But patience has a condition. Shoppers are willing to wait, but only if the wait is predictable. 76.05% prefer retailers who show a specific delivery date at checkout. When free delivery comes with a vague "3-5 working days", customers start considering other retailers.

The fix is simple: replace delivery windows with a delivery date. "Arrives by Thursday" creates a more solid commitment, and the data suggests that this reduces abandonment immediately, particularly in France (89.90%), Italy (84.76%), and the UK (83.60%).

✦ **Key insight:** Shoppers want free delivery *and* a clear delivery date. Offering one without the other only captures part of the value. ✦



## Out-of-home delivery is no longer a niche

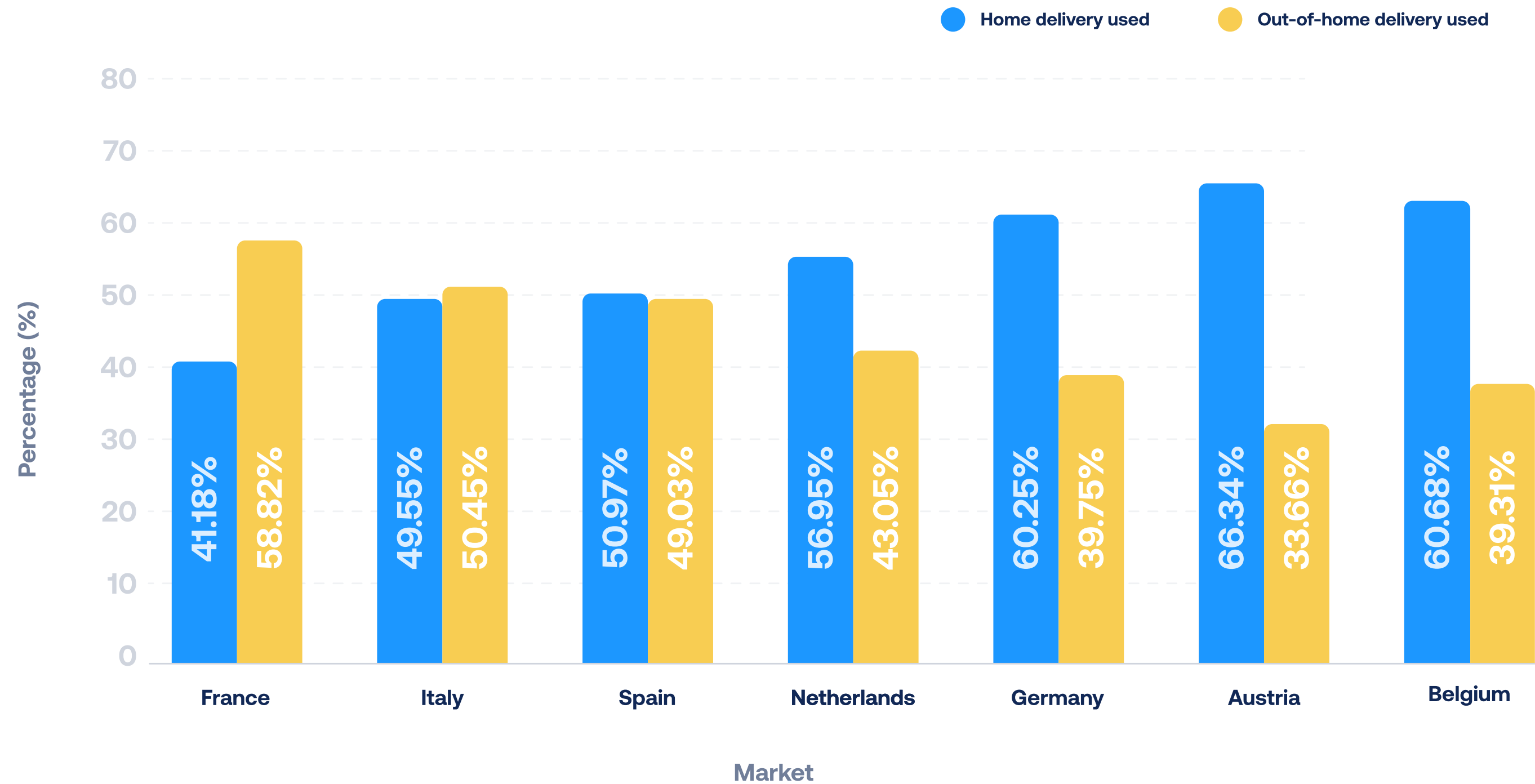
Home delivery still leads, but nearly half of European shoppers no longer use it exclusively.

In the past three months, 45.34% of shoppers used at least one alternative delivery location: a service point (17.97%), a parcel locker (15.49%), or a local shop collection (11.88%).

In France, out-of-home is already more popular than home delivery, thanks to the country's established delivery point network. Italy leads on parcel locker adoption (20.40%). Spain shows the highest pick-up at local shop usage (18.34%).

When asked which options they'd like to see, customers still prefer standard home delivery (30.60%), but service point pick-up (10.27%), parcel lockers (9.16%), and local shop collection (7.40%) together account for more than a quarter of customers' preferences.

If you only offer home delivery, you risk putting off a large number of European customers who find it more convenient to collect their orders themselves instead of waiting at home for a delivery.



## Speed expectations are market-specific, not universal

Most European shoppers are reasonable about delivery speed. 36.90% expect delivery within 2–3 days; 33.78% are comfortable with 4–5 days. Only 2.38% demand next-day as an absolute maximum.

But we found significant differences from one country to the next:

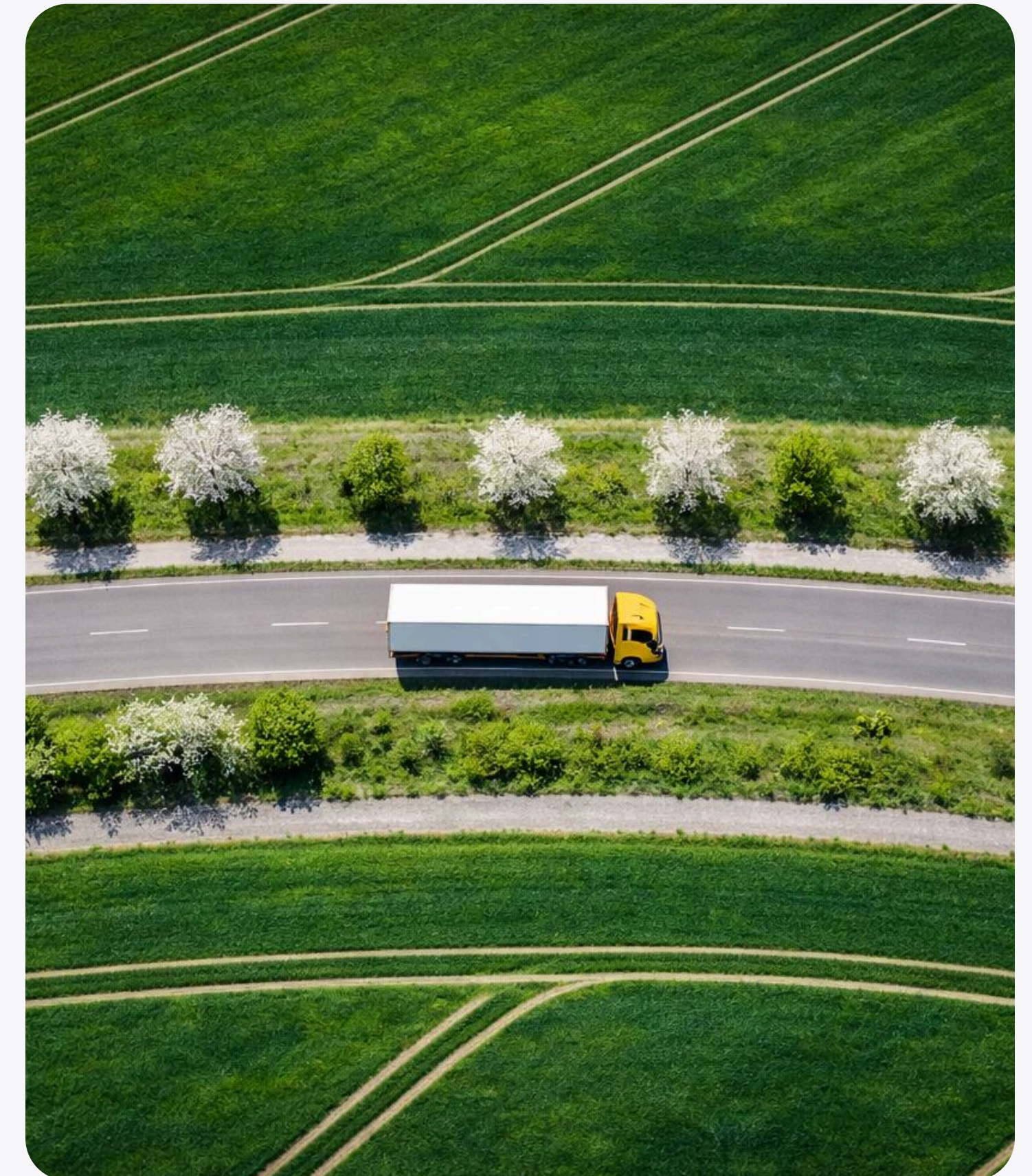
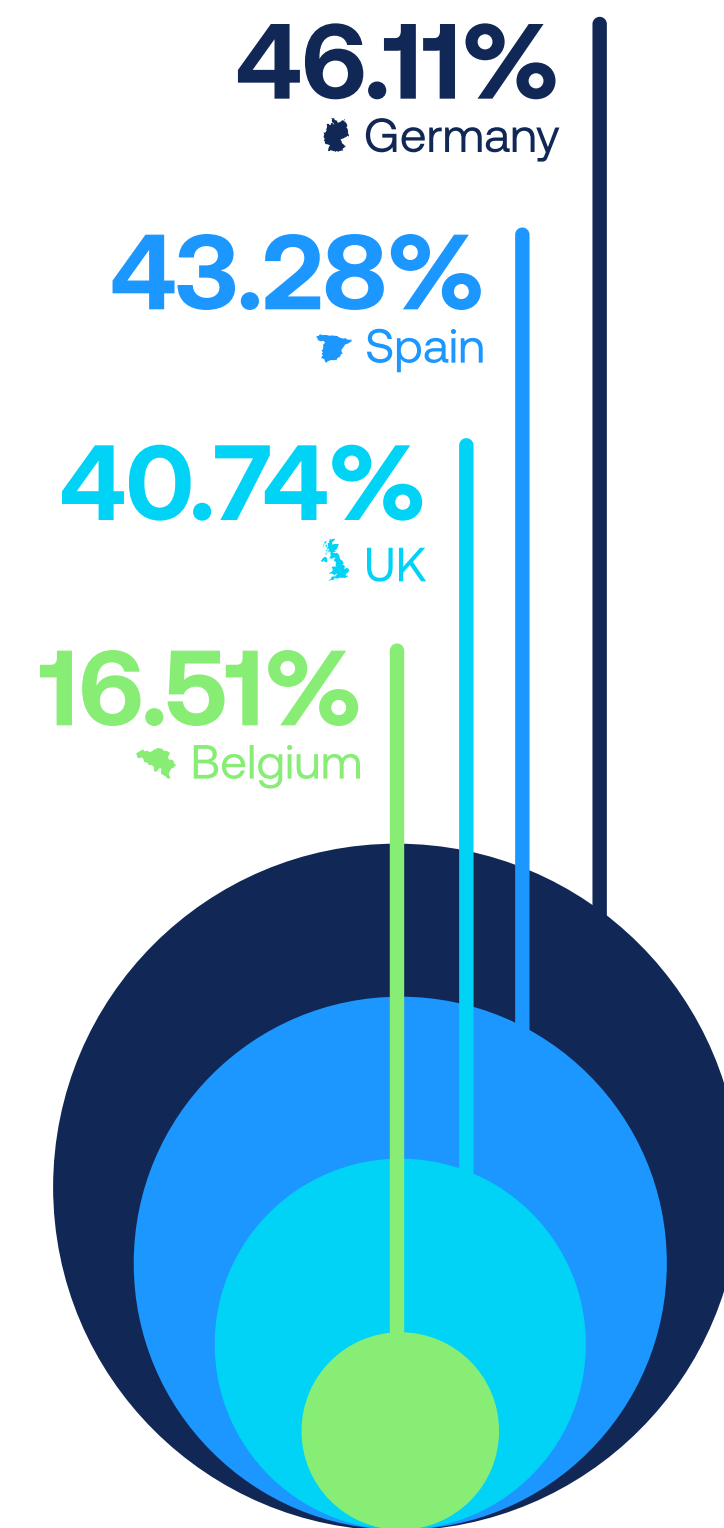
Germany: 46.11% expect delivery within 2–3 days, which is the tightest expectation in the study

Spain: 43.28% expect 2–3 days, close behind Germany

UK: 40.74% are comfortable with 4–5 days, which is more patient than you might expect in a country with such high marketplace adoption

Belgium: 16.51% are willing to wait more than 7 days, making it the most patient market overall

A single pan-European delivery promise ("delivered in 3–5 days") will broadly satisfy UK shoppers, partially satisfy German ones, and feel overly generous to Belgian customers. A better approach is to tailor your delivery promises to meet each individual country's specific expectations.

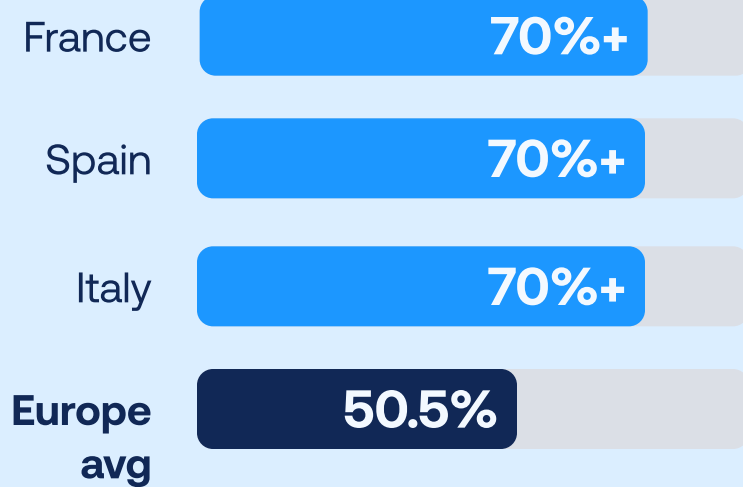




**50.51%**

more likely to complete purchase when multiple delivery options are available

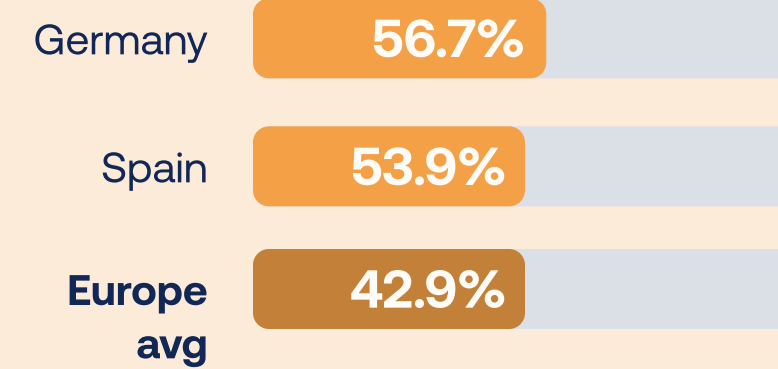
**Purchase intent uplift:  
multiple options available**



**42.87%**

feel frustrated when delivery is limited to a single courier

**Frustration:  
limited to a single courier**



## Choice drives conversion, but it doesn't have to mean complexity

50.51% of European shoppers are more likely to complete a purchase when multiple delivery options are available. In France, Spain, and Italy, that figure exceeds 70%.

This is one of the strongest purchase intent signals in the entire survey. And it doesn't require a long list of options. It requires the right three: home delivery, one out-of-home alternative, and a speed upgrade. The perception of choice is as powerful as the choice itself.

The reverse is also measurable. 42.87% of shoppers say they feel frustrated when delivery is limited to a single courier. That number rises to 56.70% in Germany and 53.92% in Spain.



## **Sustainability: Green delivery is welcome, if it's free**

Sustainability is a genuine consideration for European shoppers, but almost always a conditional one.

65.57% globally still choose faster delivery over a greener but slower alternative. And 64.62% say they would only choose greener delivery if it costs nothing extra.

The markets where sustainability has the most real pull are Belgium (43.32% willing to accept slower delivery for environmental reasons) and France (41.62%). The UK is the least eco-flexible: 72.02% choose speed over sustainability.

CO2-neutral delivery as a checkout option is still a minority preference globally (3.91%), but it is more popular in Austria (6.17%) and Germany (5.60%).

The practical implication: sustainability is not a differentiator for most European markets today. **But it is a good practice in German-speaking markets, and offering it at no extra cost in those markets can help your brand stand out.**



# 03

Chapter 3

## What drives customers away



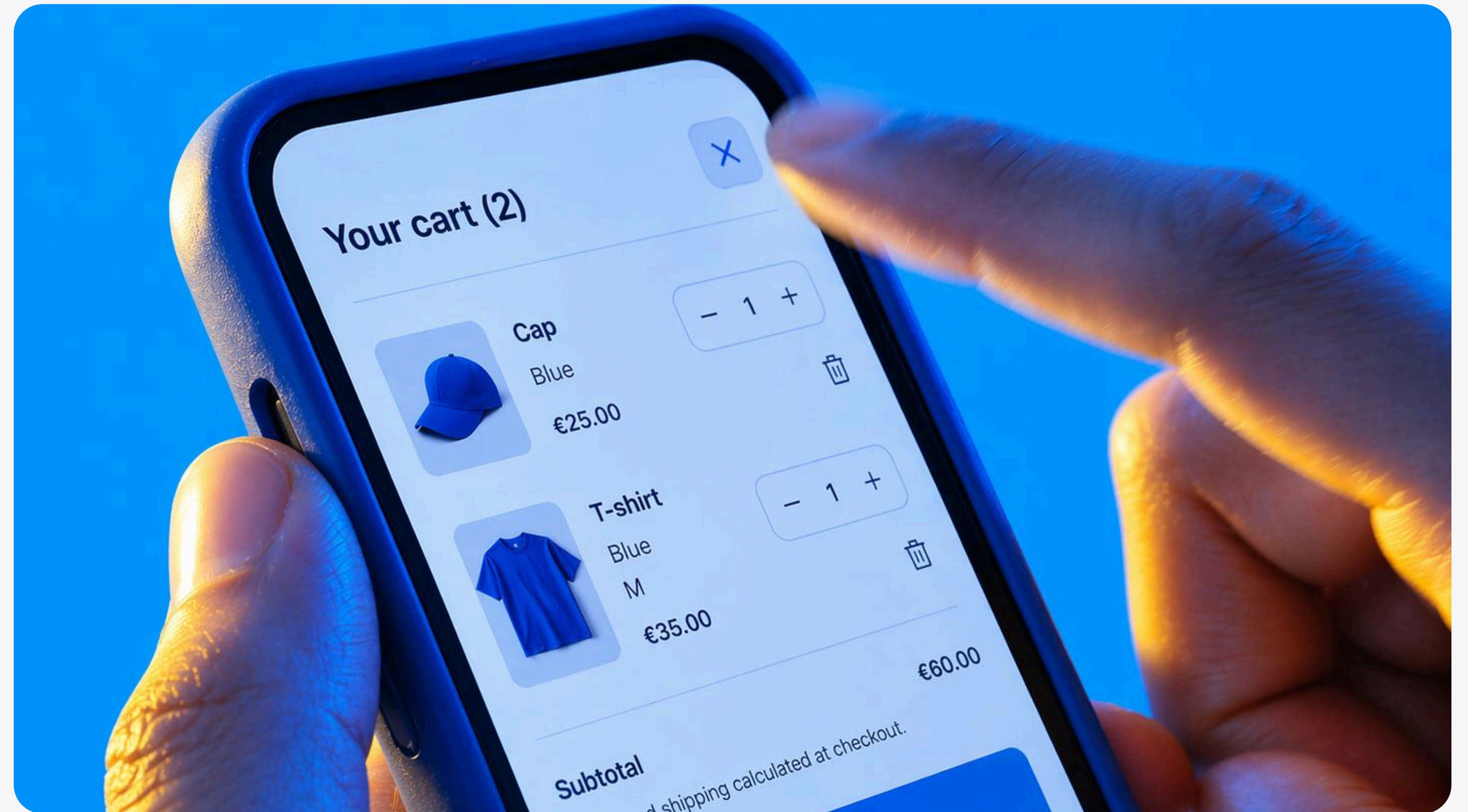
## Cart abandonment: Preventable revenue loss

Cart abandonment is one of the most consistent, most measurable, and most fixable problems in European e-commerce. The data is clear on how big the problem is, why it happens, and what you can do to prevent it.

Ambiguity around shipping is the quietest conversion-killer in e-commerce. Shoppers don't abandon your checkout because shipping costs are too high. **They abandon because they don't trust them.**



**Karel Cardinaels**  
CEO at Radikal



## The scale: nearly half of European shoppers, every three months

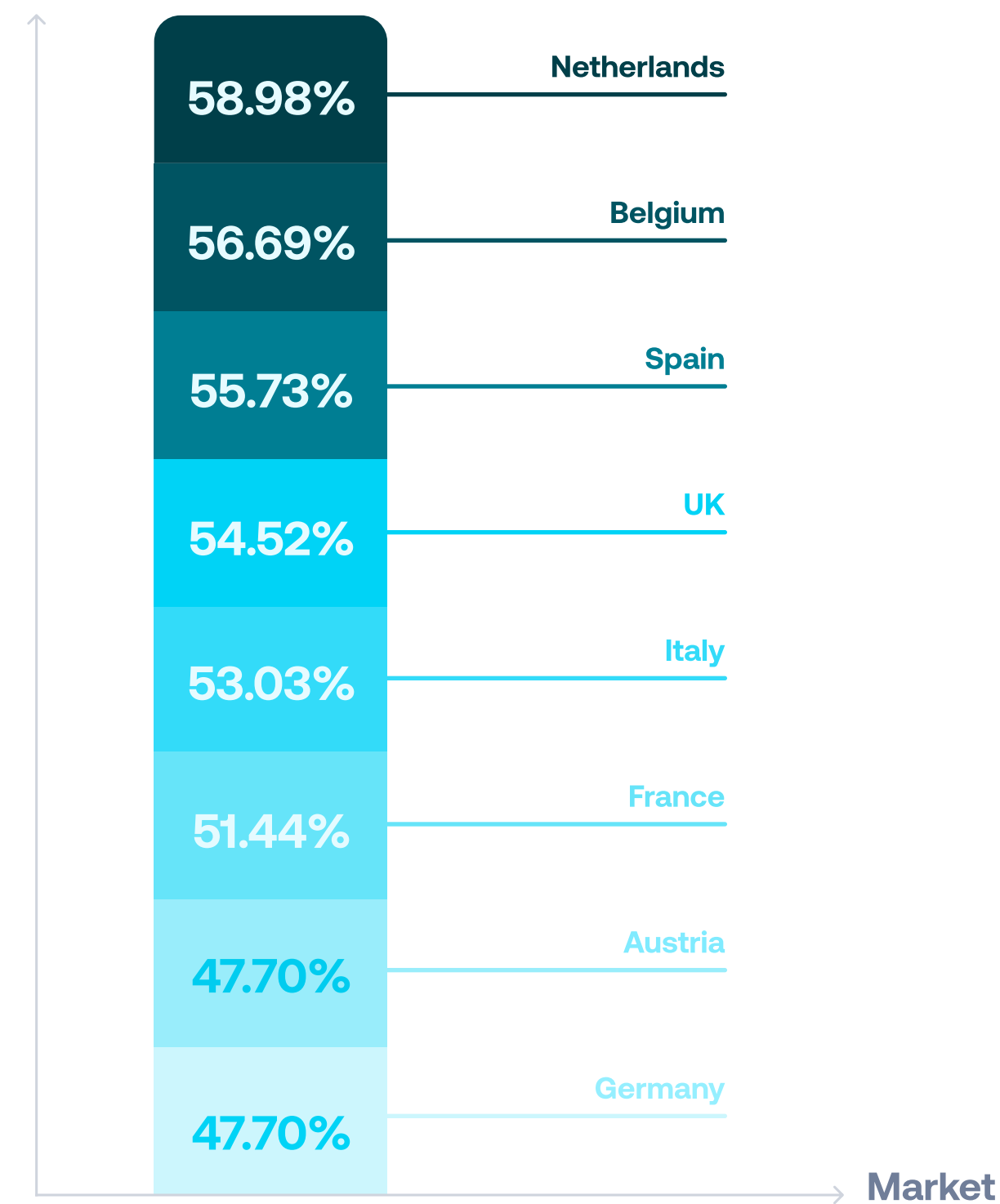
Even for small and mid-sized e-commerce retailers, shopping cart abandonment is a major obstacle. Even a small reduction in cart abandonment can mean a big boost in sales.

Here's how big the problem really is:

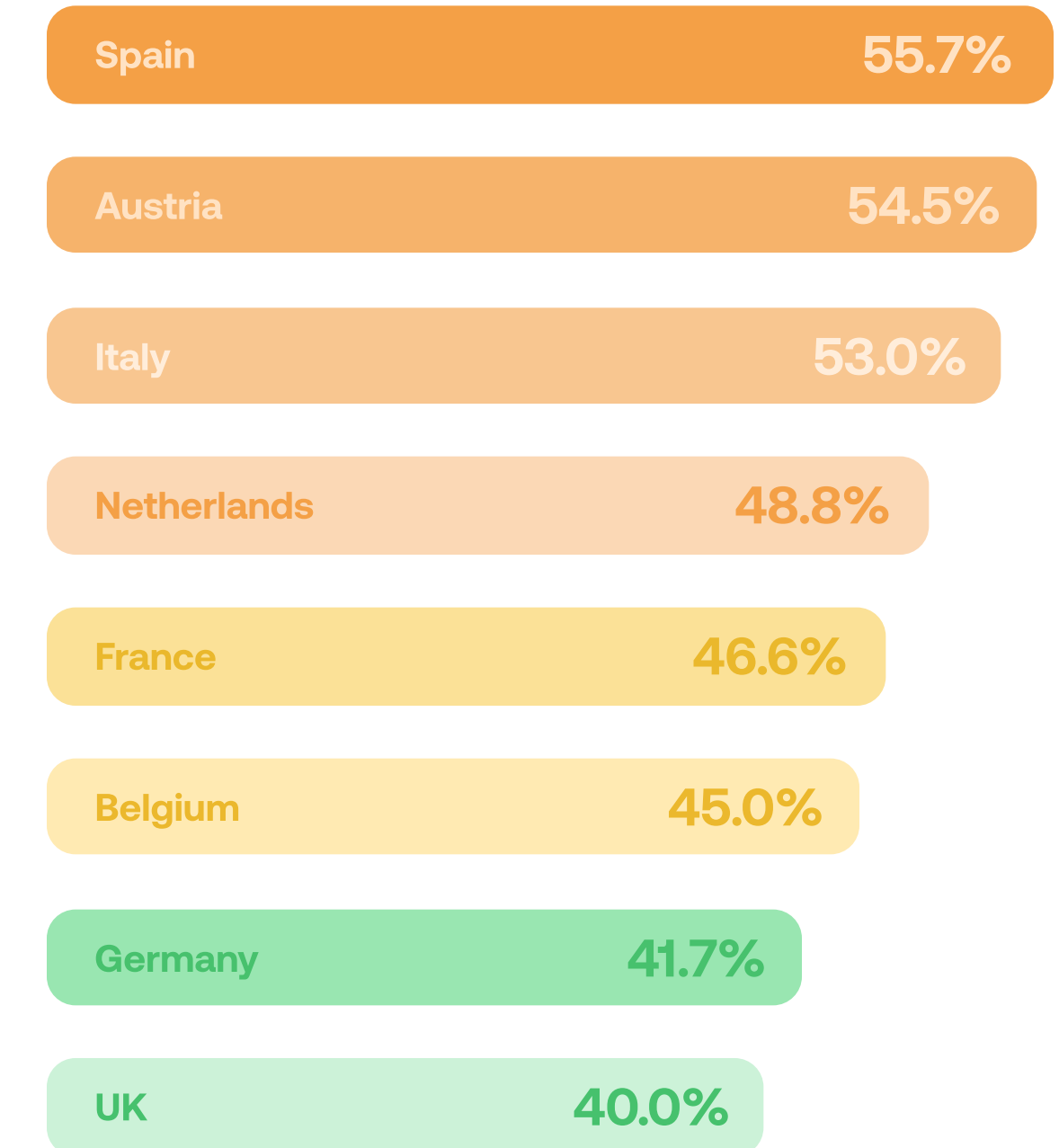
- **48.17% of European shoppers abandoned a cart** due to a delivery-related issue in the past three months alone.
- **20.32% abandoned two to three times** in the same period.
- **4.87% abandoned four or more times.**

Germany and Austria show the lowest abandonment rates, which is consistent with their more transactional shopping behaviour and stronger familiarity with local delivery networks. But even in the most resilient markets, nearly half of shoppers still walked away from a cart because of delivery.

Delivery-driven abandonment rate (%)



## Most shoppers have abandoned a cart over delivery at least once

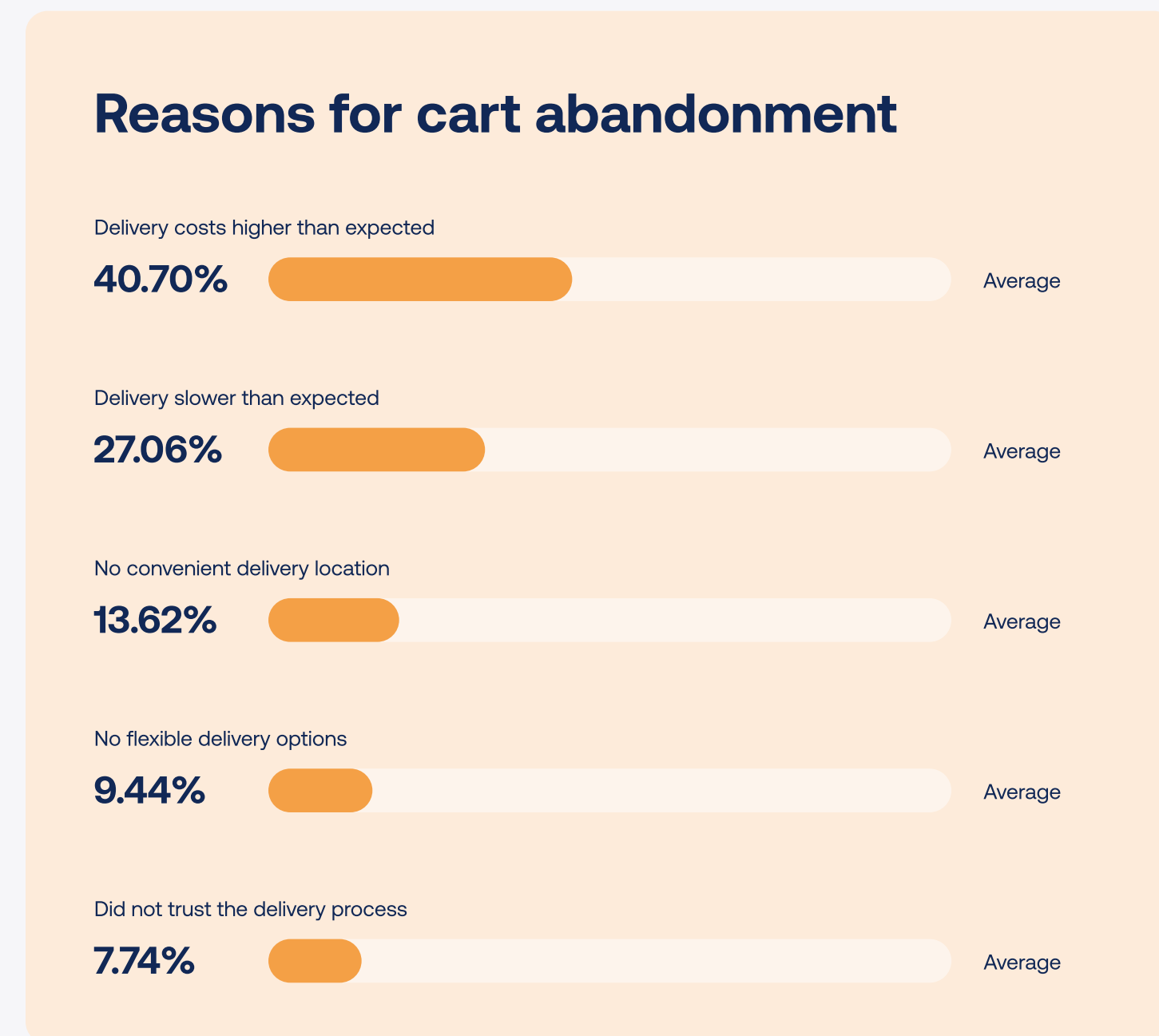


## The causes: Information failures, not logistics failures

Interestingly, our research found that the top reasons for cart abandonment related to poor communication rather than actual delivery policies.

“Unexpected costs“ mean that your prices appear too late in the journey. “Slower-than-expected delivery” means your delivery windows are either too vague or maybe even lacking altogether. “No convenient location” means, for example, that your out-of-home delivery options are missing from the checkout, even if you actually do offer them.

Every one of the top three causes has a checkout-level fix that requires no change to the underlying logistics operation.



**Key insight:** 40.70% of delivery abandonment is caused by unexpected costs. That's a UX problem. Always show the fee before the payment screen.

**Order #10581**

ITEM	QNT (4)	PRICE
	1	€30
	2	€60
	1	€140

All costs shown upfront

**TOTAL €230**

Checkout

## Main reasons for delivery-related cart abandonment



On cost sensitivity <b>45.49% Italy</b>	On location inconvenience <b>16.70% Netherlands</b>	On speed sensitivity <b>35.37% Italy</b>
<b>42.68% Austria</b>	<b>16.67% Belgium</b>	
<b>42.51 UK</b>		

## Where each market feels it most

The causes of abandonment vary significantly by market, and so do the solutions.

- **Cost transparency matters most in:**

Italy (45.49%), Austria (42.68%), UK (42.51%). These are the markets where showing delivery fees earlier in the journey would have the biggest impact on conversion.

- **Speed communication matters most in:**

Spain (35.37% say slower-than-expected delivery as their biggest reason for abandonment). Spanish shoppers don't necessarily need faster delivery, but they definitely prefer a more accurate delivery promise.

- **Location options matter most in:**

Italy (17.65%) and the Netherlands (16.70%). When those options aren't clearly displayed during checkout Italian and Dutch customers are more likely to leave.



## Preferences unmet, purchases lost

The abandonment data and the preference data tell the same story from opposite directions.

76.05% of shoppers prefer retailers who show a specific delivery date at checkout, yet 27.06% abandon when delivery feels slower than expected. The promise wasn't made, so the expectation couldn't be met. 50.51% are more likely to complete a purchase when multiple delivery options are available, yet 13.62% abandon when no convenient location is on offer.

In both cases, customers are missing information that is important to them before they decide to buy. That lack of information drives cart abandonment. By correcting it, you stand to gain more conversions with relatively little effort.

# 04

Chapter 4

## Post-purchase experience



## Where delivery turns into conversion, loyalty, or remorse

Getting a shopper to checkout is one challenge. Keeping them as a customer is another. What happens between dispatch and doorstep is where the relationship is either cemented or broken. In today's market, it's breaking more often than most merchants realise.

Brands that lose trust usually make customers question their decisions, wait too long, or feel like no one owns the problem.



**Theo Burns**

Partnerships at Gorgias





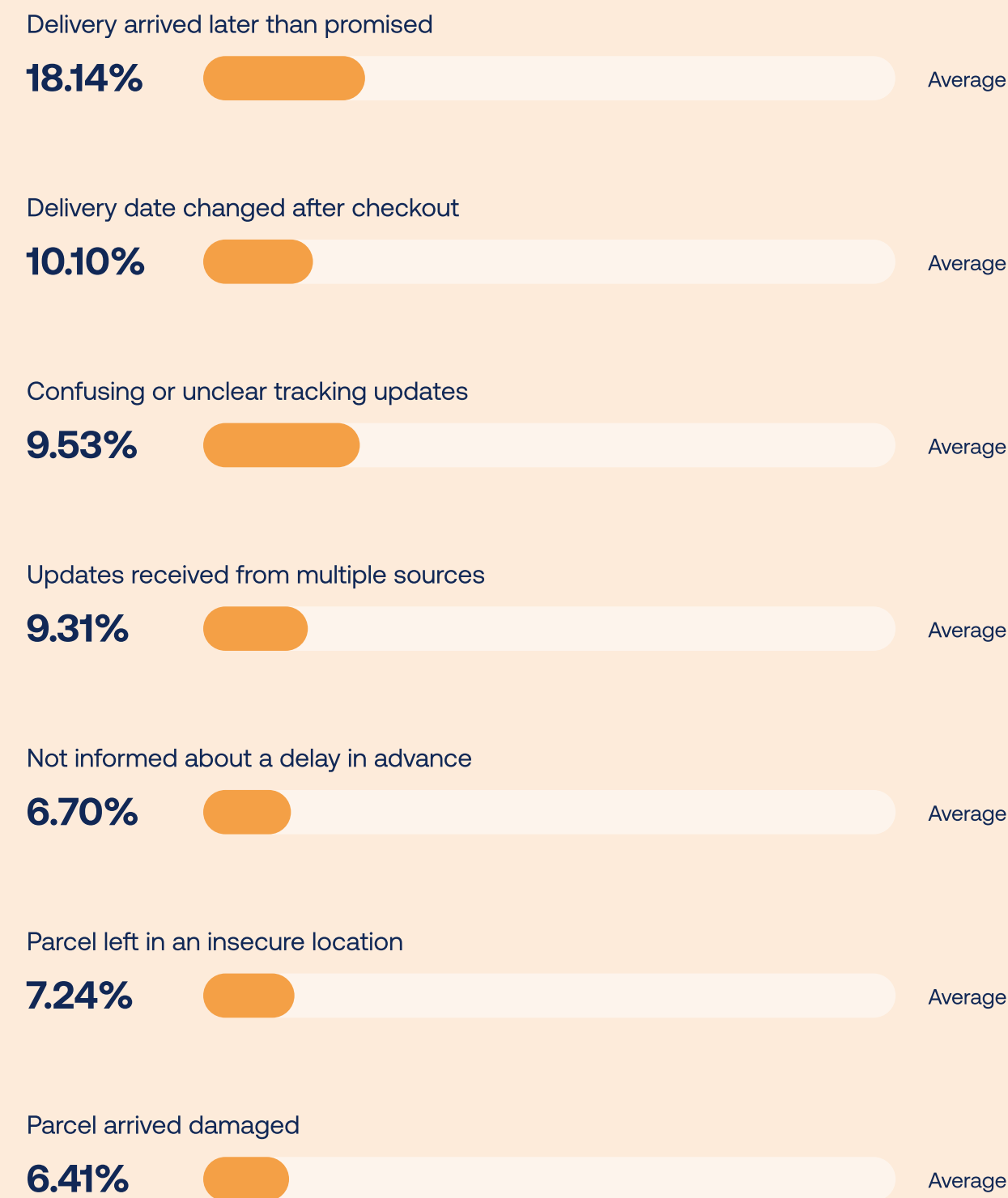
## Three in four shoppers had a problem with their last delivery

77.07% of European shoppers experienced at least one issue with their most recent delivery. Only 22.93% reported no problems at all.

Late arrival is the most common issue (18.14% globally), but the range of problems tells a broader story about last-mile inconsistency across the region.

Some markets face sharper versions of this problem. France records the highest late delivery rate (22.63%). Germany sees the most parcel damage (7.48%) and insecure placement (9.65%). Spain leads on confusing tracking (14.12%). Only Italy stands out positively: 28.94% of Italian shoppers experienced no issues, the best rate in the survey.

### Issue experienced



**France** **22.63%**

Late delivery ⚠ Highest late delivery rate

**Germany** **7.48%**

Parcel damage ⚠ +9.65% insecure placement

**Spain** **14.12%**

Confusing tracking ⚠ Highest tracking confusion

**Italy** **28.94%**

No issues reported ✅ Best result in the survey

## Nearly 1 in 3 shoppers won't come back after a delivery failure

The commercial consequence of these failures is direct and measurable.

29.06% of European shoppers decided not to reorder from a store following a delivery problem in the past six months. That's nearly one in three customers lost, not to a competitor's better product or price, but to a logistics failure that, in most cases, was the courier's fault, not the retailer's.

The markets at highest risk of delivery-driven churn:

 **35.73%**

 **33.16%**

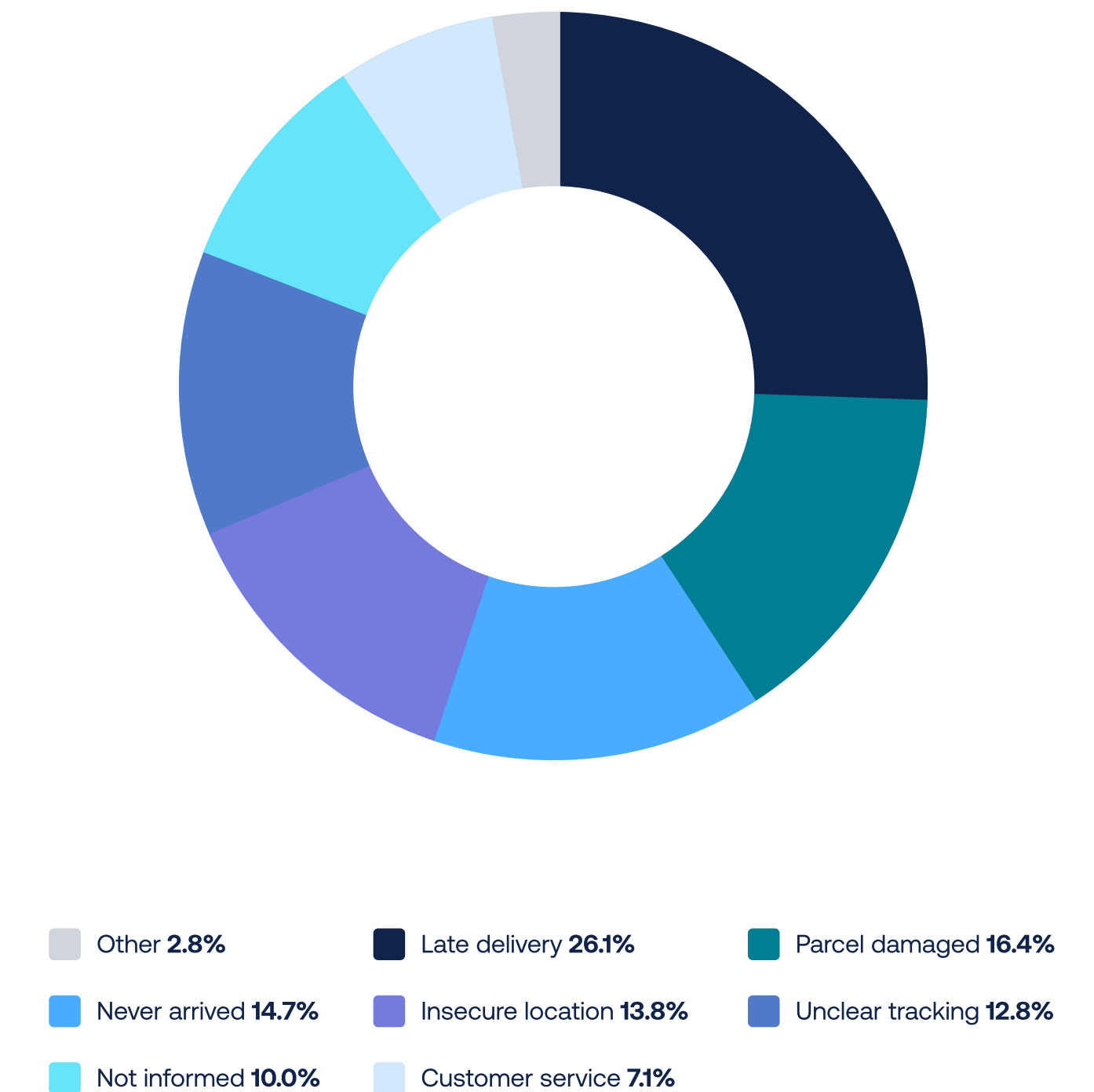
 **31.28%**

France is a notable exception: despite recording the highest late delivery rate in the survey, it shows the lowest churn rate (20.33%). This means that either French shoppers are simply more forgiving, or they can accept a delivery failure without switching to a different retailer because of other factors like brand loyalty or pricing.

When shoppers do leave, late delivery is the most cited reason (26.06%), followed by parcel damage (16.36%), non-arrival (14.67%), and insecure placement (13.83%).

The pattern is consistent: customers churn when delivery fails to meet the basic promise of e-commerce. **The item should arrive, undamaged, when expected.**

## Main reasons for not reordering after a delivery issue



## Who sends the update and who owns the relationship

56.86% of shoppers globally prefer receiving delivery updates from the couriers rather than the retailer. On the surface, this might suggest merchants can safely leave post-purchase communication to their couriers.

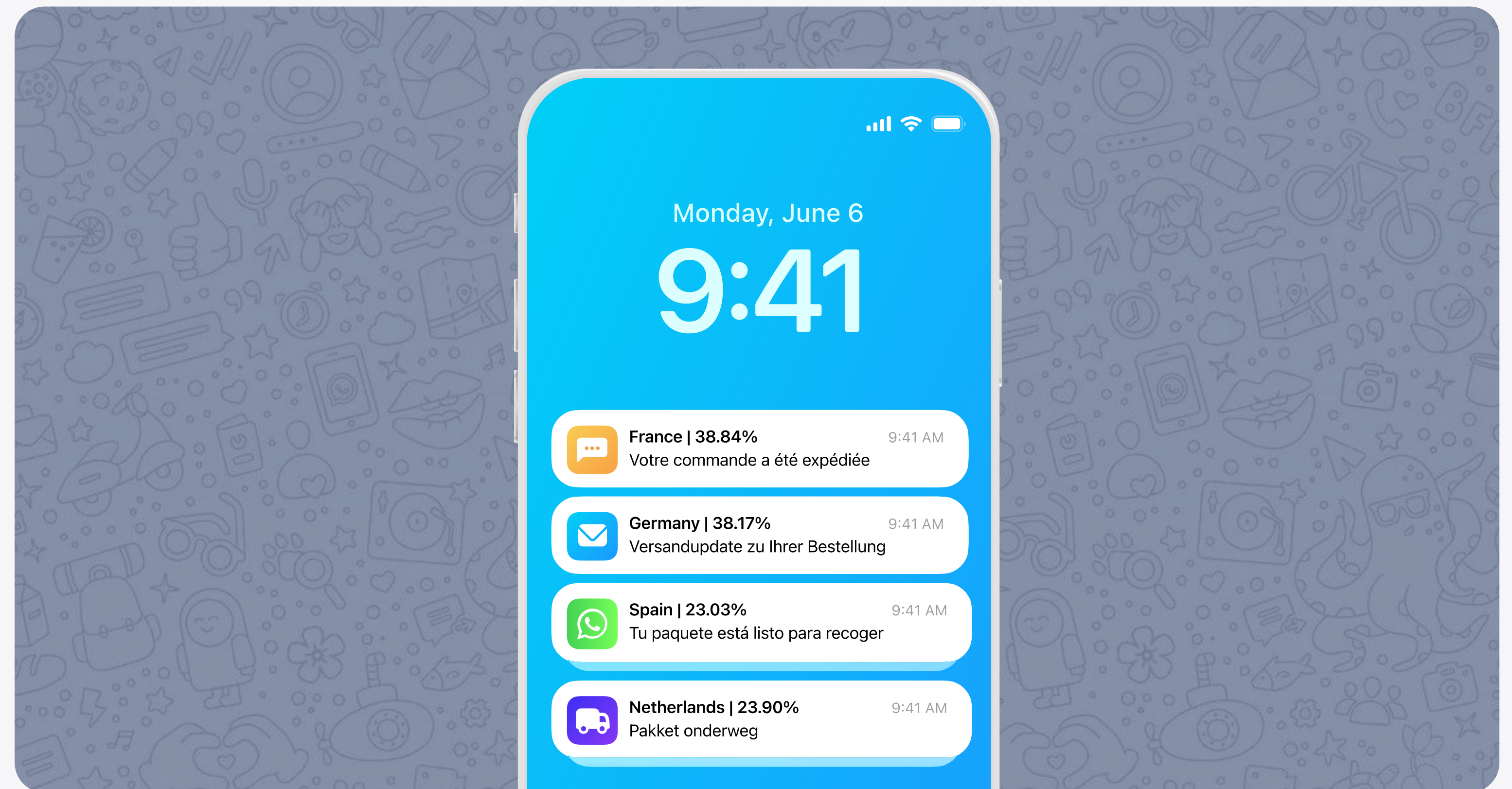
The accountability data tells a different story. When something goes wrong, 42.46% of shoppers hold the online store responsible, not the courier.

Retailers who have handed off the entire communication layer to their courier have given up the chance to build the relationship during the good moments, while still carrying full reputational exposure during the bad ones.

The practical response is staying present alongside it. That means offering proactive delay alerts before the shopper notices the problem, providing branded tracking that keeps the retailer visible throughout the journey, and giving a clear resolution path that makes it easy for the customer to come back to the store, not just the courier, when something goes wrong.

It is also important to communicate via the customer's preferred channel. Getting the relationship right means also getting these channels right.

A single-channel post-purchase strategy is not good enough if you are operating in multiple markets. The communication layer of the Shipping Formula means using the right communication channel, in the right market, at the right moment, and always with the retailer's brand visible when it matters most.





## What separates an acceptable delivery from a great one

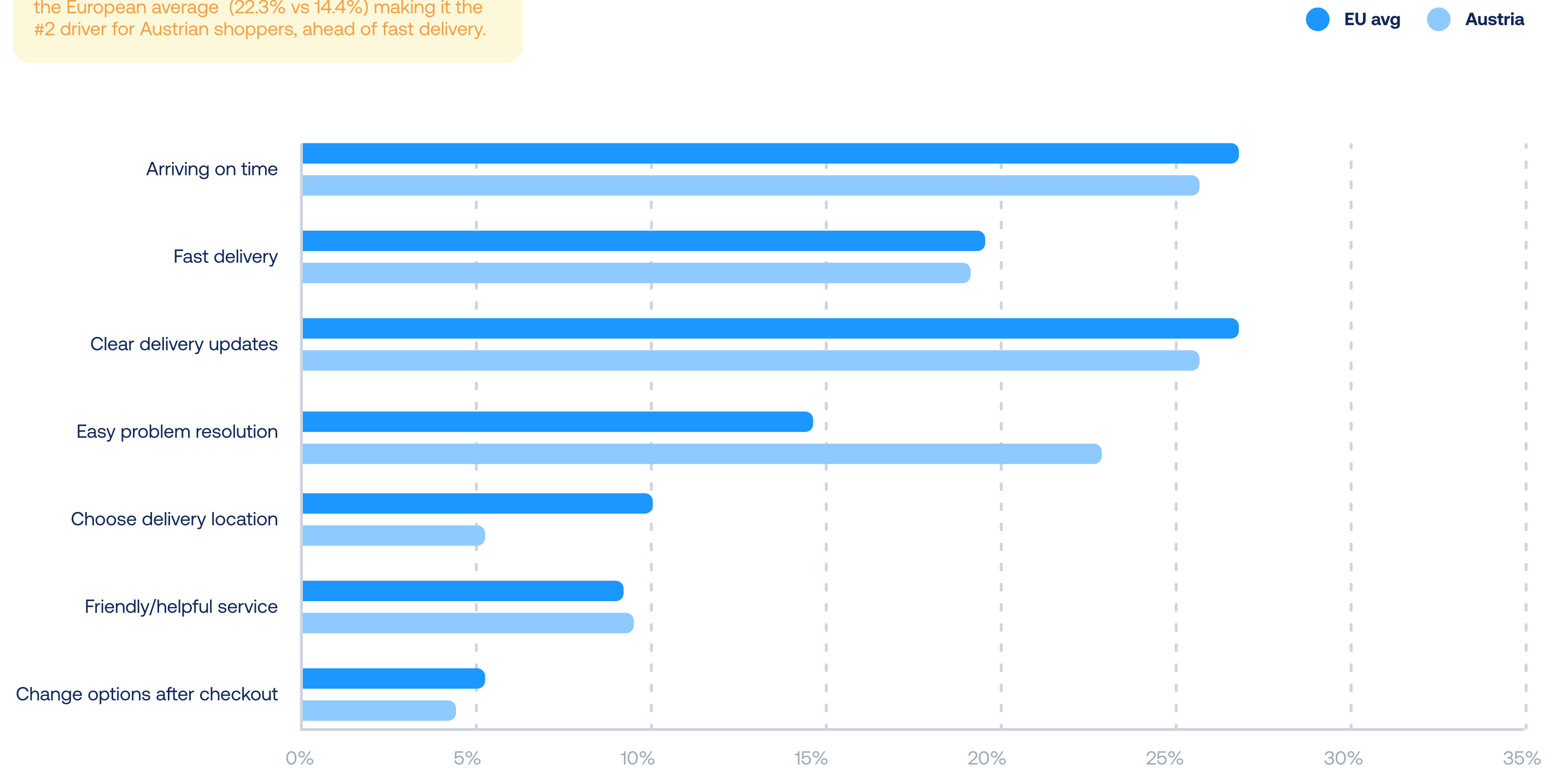
Punctuality, not speed, is what shoppers value most.

26.56% say arriving on time is the single biggest differentiator between an acceptable and a great delivery experience. Fast delivery comes second (19.72%), followed by clear updates (16.16%), easy problem resolution (14.43%), and the ability to choose delivery location (9.30%).

If a customer receives their delivery on the promised day (even if it takes four days), they value it more highly than if the delivery arrives in two days but misses its window. If your current delivery strategy revolves around promising fast shipping, just remember: promising speedy delivery and missing it is worse than promising standard delivery and hitting it.

Austria is the one market that breaks the global pattern. 22.30% of Austrian shoppers cite easy problem resolution as the top differentiator. In Austria, the quality of the recovery when something goes wrong can make all the difference to shoppers.

Austria ranks problem resolution notably higher than the European average (22.3% vs 14.4%) making it the #2 driver for Austrian shoppers, ahead of fast delivery.





## Proactive communication is the cheapest form of retention

The majority of European customers now genuinely expect three post-order communications: **shipment confirmation, proactive delay alert and out-for-delivery notification.**

If your shop is not already sending all three of these messages, it is already falling short of what shoppers consider normal.

There are also some additional customer expectations, depending on which market you're selling to. Personalised post-delivery discounts are welcomed by 55.37% globally (rising to 74.66% in Italy and 73.69% in Spain) but only 52.44% in the Netherlands, where 13.45% find them annoying. So, if you deploy the same discount campaign or strategy across Europe, it might build loyalty in Southern markets but backfire in Northern ones.

The most consistently unpopular communications are product reorder suggestions (37.81% find them annoying globally) and delivery rating requests (33.90%). Messages that feel like the retailer is asking for something are significantly less welcome than messages that feel like the retailer is giving something.

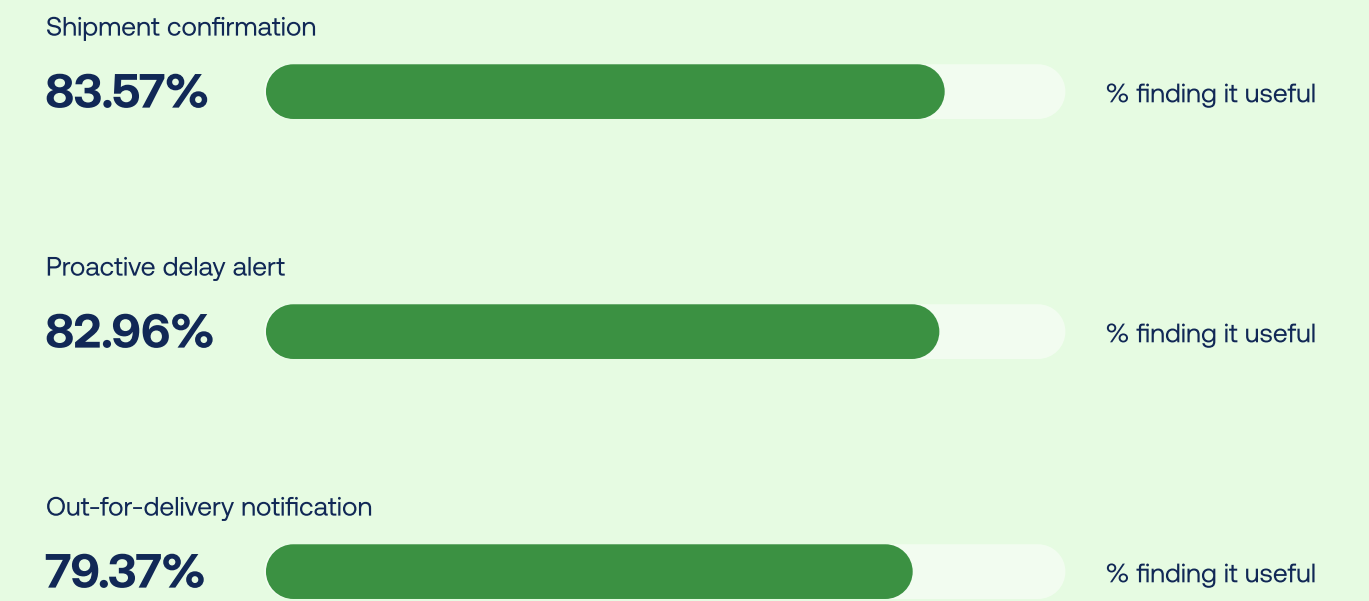
# The brands that protect loyalty treat WISMO and delivery issues as trust moments: **they respond quickly, communicate clearly, and give customers visibility before frustration escalates.**



**Theo Burns**

Partnerships at Gorgias

### Communication type



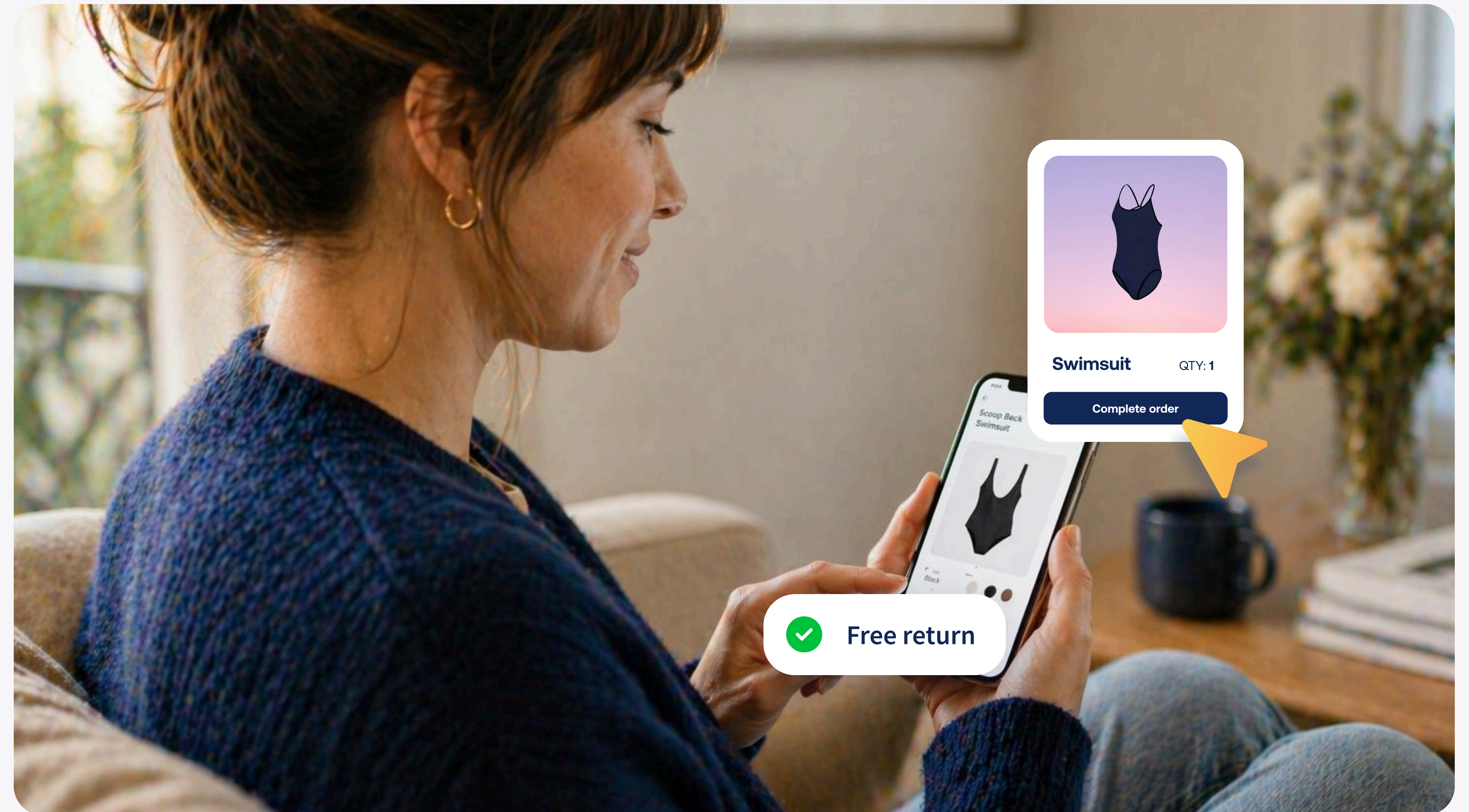
# 05

Chapter 5  
**Returns**



## A conversion asset in disguise

Many retailers still treat returns as a cost to manage or an operational headache at the back end of the customer journey. Yet the data shows that your returns policy influences whether a shopper buys in the first place. Getting it right could enable you to win new sales in the first place.

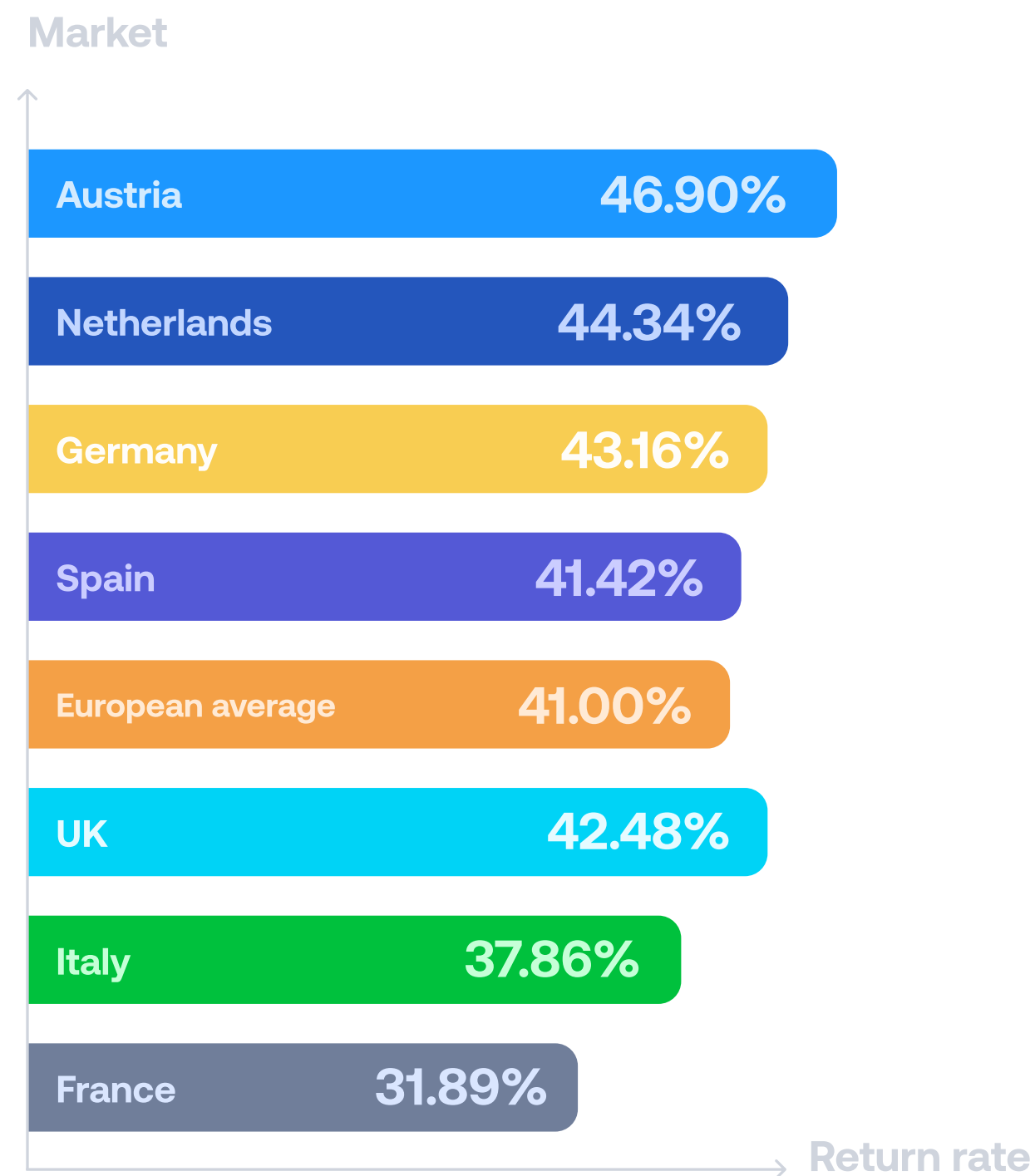


## Returns are mainstream, not an exception

41% of European shoppers returned at least one order in the past three months. For many markets, the figure is even higher.

Austria, Germany, and the Netherlands lead the returns table. These are markets with strong consumer protection cultures and an entrenched try-before-you-buy mentality, particularly in fashion. France is at the opposite end, with the lowest return rate in the survey. But as the next section shows, low return activity does not mean low return sensitivity.

### Shopper return rates by market



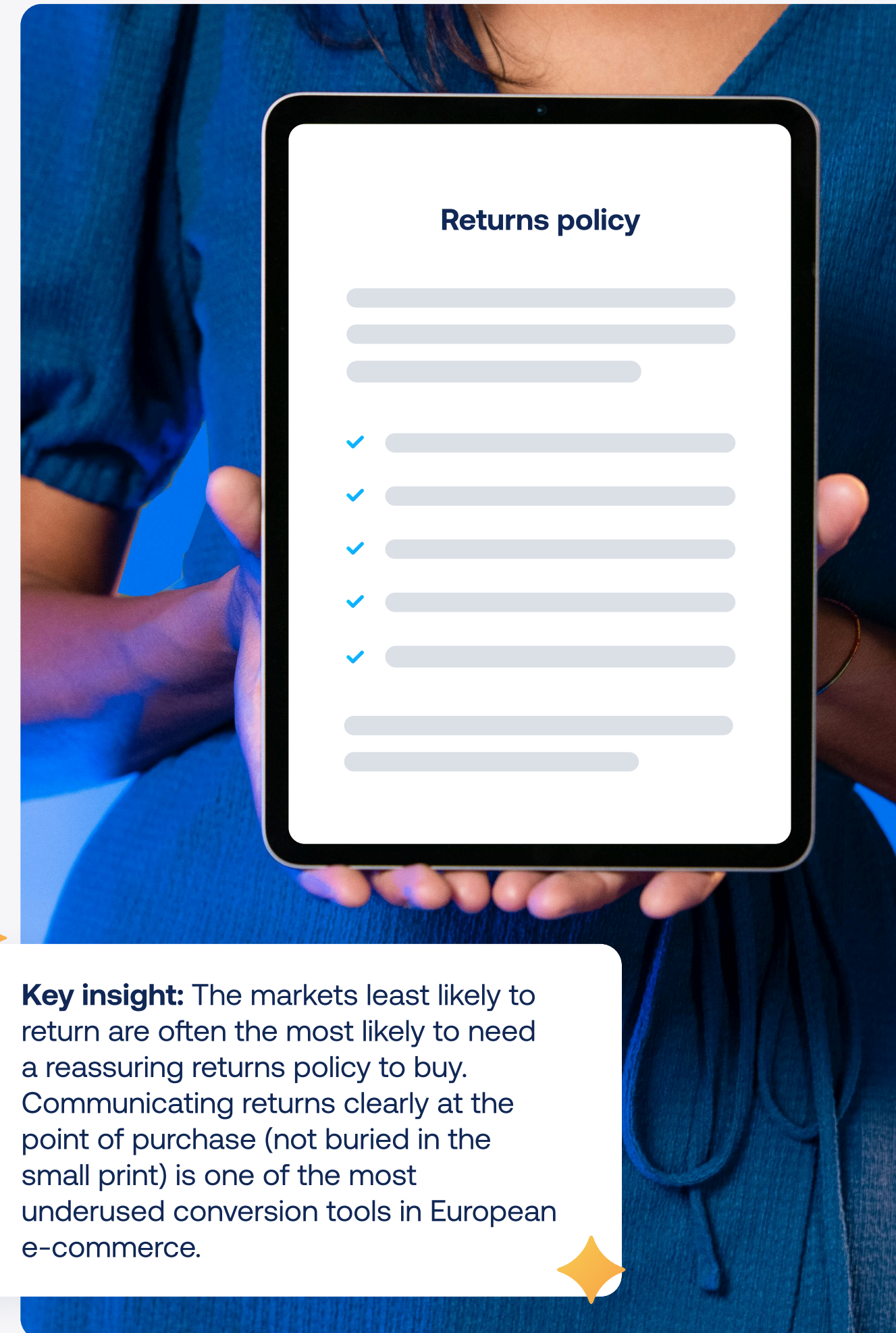
## The France paradox and what it reveals about returns

France's low return rate (31.89%) might suggest its shoppers don't care much about returns policy. The opposite is true.

81.60% of French shoppers say they're more likely to buy from a store that offers easy online returns. That is the highest figure of any market, and well above the European average of 70.73%. French shoppers don't return often. But they need to know they could before they commit to buying.

We see the same pattern across Southern Europe. In Italy and Spain, just over 81% of shoppers say an easy returns process would make them more likely to buy. Returns also play a clear role when people abandon their baskets, with 25% of shoppers in Italy and 22.12% in Spain naming return policy concerns as one of the main reasons.

For a significant share of European shoppers, a clear and generous returns policy is an important factor in getting them across the finish line to conversion.

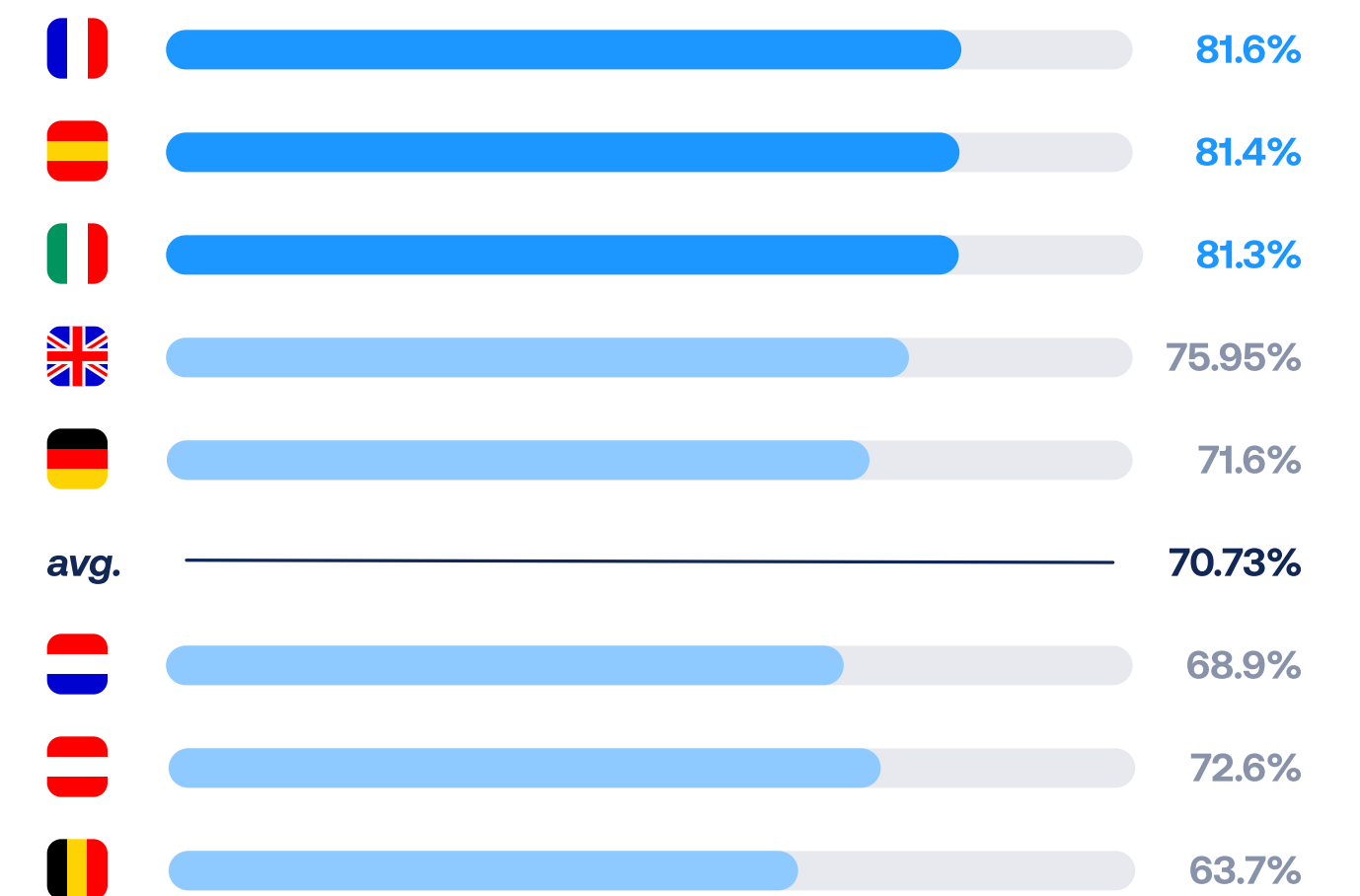


**Key insight:** The markets least likely to return are often the most likely to need a reassuring returns policy to buy. Communicating returns clearly at the point of purchase (not buried in the small print) is one of the most underused conversion tools in European e-commerce.

# 70.73%

more likely to buy from stores with easy returns  
(EU avg)

BY MARKET - % AGREE OR COMPLETELY AGREE



### FR paradox

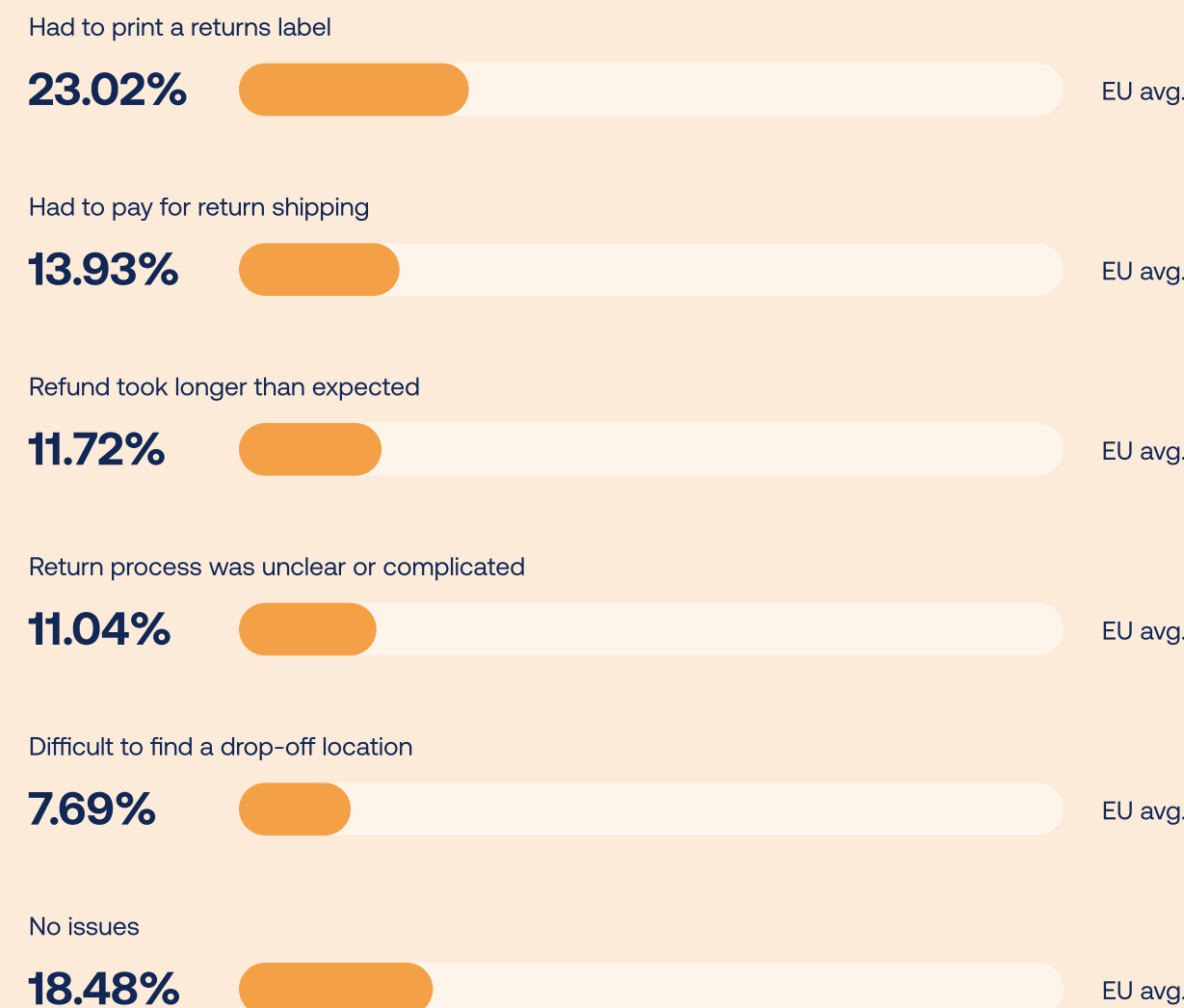
France leads on returns sensitivity at 81.6%, yet has one of the lowest actual return rates in Europe. The safety net matters even when shoppers don't use it.



## Common returns challenges and how to solve them

When shoppers who made a return were asked about difficulties they experienced during the process, the picture was clear: most return problems are practical and fixable, not structural.

### Returns challenges experienced

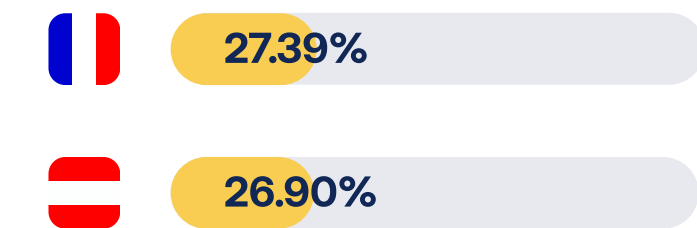


Mandatory label printing is the single biggest pain point globally, and it is already a solved problem. Label-free returns, where shoppers use a QR code at a drop-off point, are available through most major European couriers. Yet 27.39% of French shoppers and 26.90% of Austrian shoppers still encounter mandatory label printing. In markets like these, label-free returns would be a clear, low-effort way for retailers to stand out.

Paid returns are another obstacle for some customers, especially in the UK. 15.76% of UK customers say paid returns are a no-go for them, which makes sense in a market like this, where free returns from major marketplaces are the norm. Since UK shoppers are more likely to leave after just one poor returns experience, paid returns can put customer loyalty at risk here.

Germany is the positive outlier: 23.81% of German shoppers who made a return experienced no issues. That's the best performance in the survey, and notable given Germany's high return frequency. A mature returns infrastructure and clear consumer expectations appear to make the process smoother there than anywhere else in Europe.

### Mandatory label printing



### Paid returns



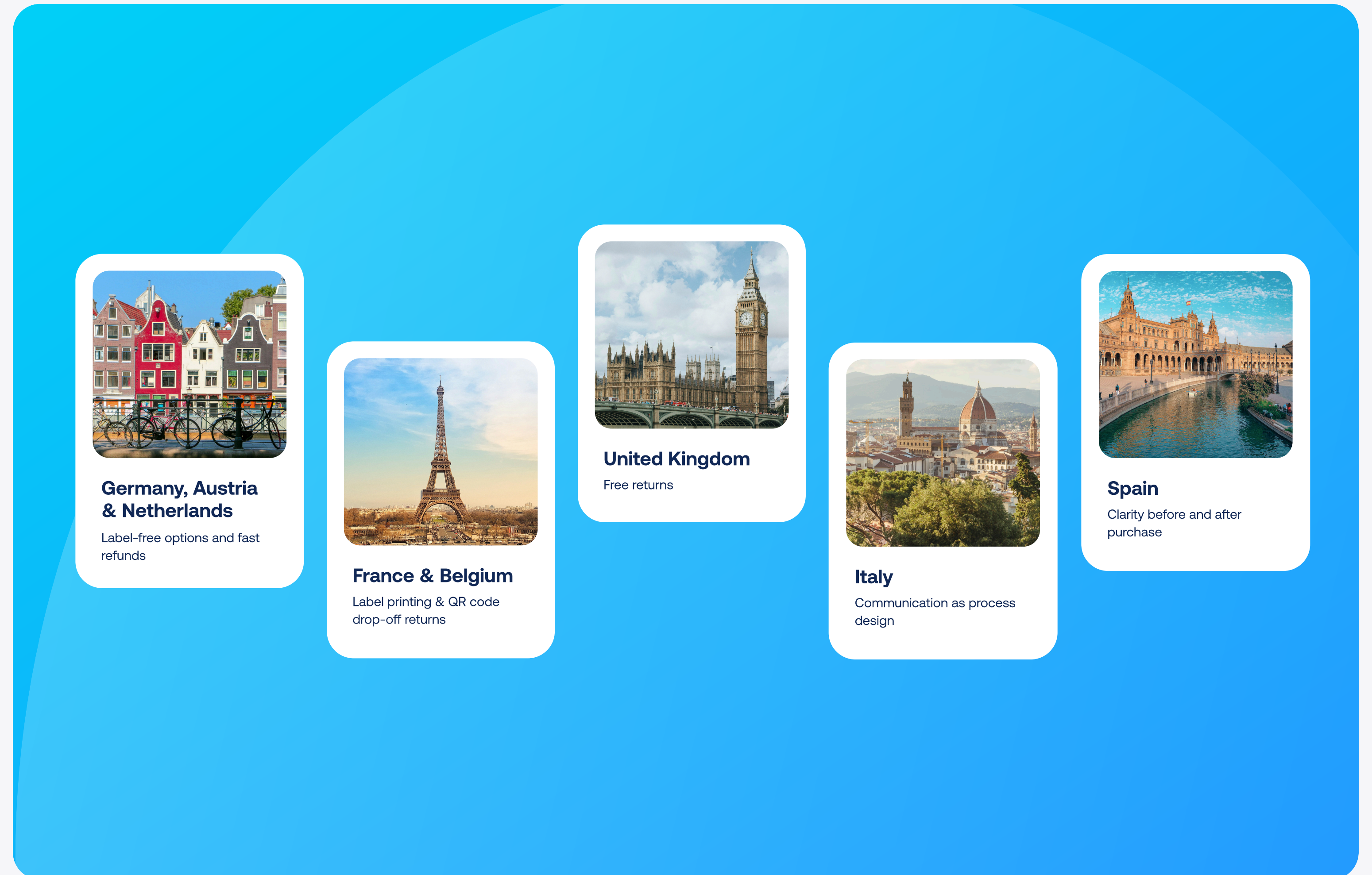
### Smooth return process



## What good returns look like by market

Returns expectations vary across Europe, so one standard policy is unlikely to work well everywhere. The data shows clear differences between different countries:

- **Germany, Austria, Netherlands:** high-return-frequency markets where the process needs to be simple and predictable. Label-free options and fast refunds are the baseline expectation, not a differentiator.
- **France, Belgium:** Label printing is the dominant pain point. Introducing QR code drop-off returns here would directly address the most commonly cited obstacle, in markets where offering easy returns can have a strong impact on sales.
- **UK:** Free returns are increasingly the norm. Charging for returns in this market is a deal-breaker for many customers.
- **Italy:** The market with the highest proportion of shoppers saying the return process was unclear or complicated (13.23%). The problem is often related to communication: Italian shoppers expect clear, explicit guidance through the returns journey.
- **Spain:** A market where the stakes around returns are high on both sides of the transaction. In Spain, 22.12% of shoppers abandon their shopping cart due to return policy concerns. With 81.42% of shoppers more likely to buy when returns are easy, the gap between promise and reality is a direct risk to revenue.



# 06

Chapter 6

## The global shopping shift



## International commerce: Built on certainty, not speed

International e-commerce is embedded in how European consumers shop. But our survey reveals an important truth about this growth: international purchasing is primarily driven by convenience, and it can be held back by a very specific set of fears that merchants can, and should, address directly.

When we started Sendcloud, most brands only focused on international shipping after they had built a strong position in their home market. That's completely changed. **Brands want European scale from day one, but usually don't have the infrastructure for it.**



**Rob van den Heuvel**

CEO & Co-founder at Sendcloud



## International is mainstream, but not always straightforward

64.09% of European shoppers ordered from a store outside their country of residence in the past six months. While international shopping is a routine part of European e-commerce life, its popularity varies by market.

Italy and Austria lead the pack, with both benefiting from having multiple European retail ecosystems next door, along with well-developed intra-European logistics corridors. The UK and Germany are at the lower end for different reasons. Germany has its own well-developed e-commerce ecosystem that makes it less reliant on international alternatives. The UK's lower rate reflects how complicated and expensive importing retail goods has become since Brexit.

### Adoption varies by market:

Ordered internationally in the past 6 months



● Italy 73.06%	● Austria 72.80%	● Belgium 71.57%	● France 66.44%
● Netherlands 64.32%	● Spain 56.37%	● Germany 55.75%	● UK 52.42%

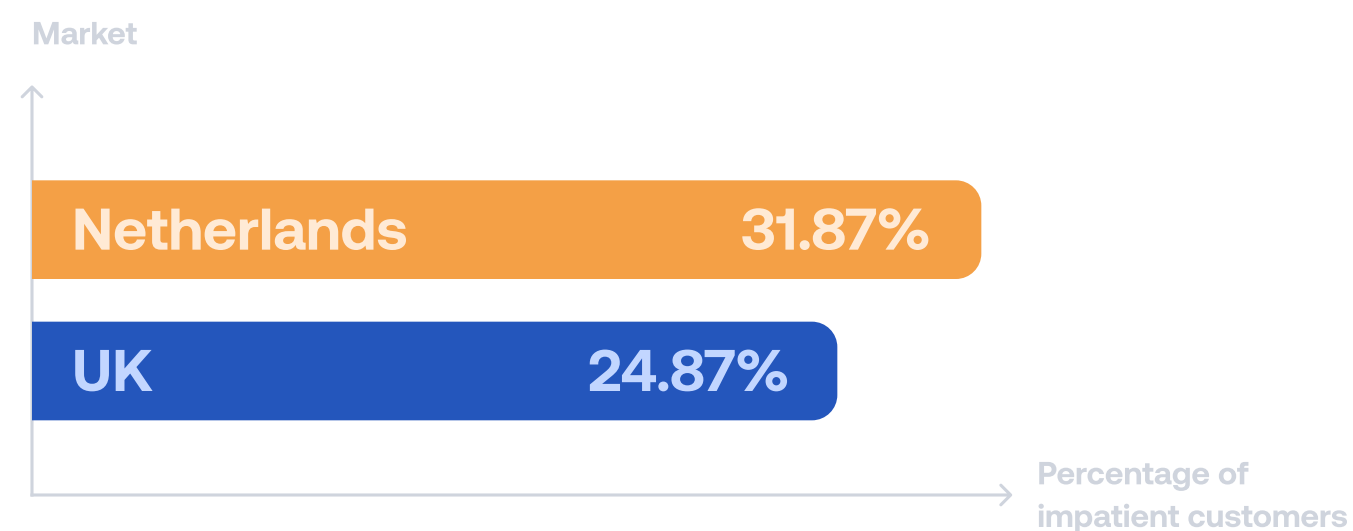
## How long will international shoppers wait?

When it comes to estimating international delivery windows, you have a little more flexibility than with domestic ones, but only up to a point.

71% of European shoppers accept a delivery window of 5–14 days. That is a range that most international logistics corridors can comfortably meet. The challenge is communicating a specific date within that window and committing to it.

The Netherlands is the most impatient international market, with 31.87% setting a maximum acceptable wait of just 5–7 days. The UK is the most patient, with 24.87% willing to wait 11–14 days and 10.86% accepting up to 15–20 days. Many international shoppers in the UK are tolerant of longer wait times and accept them as part of life in the post-Brexit era.

### Patience levels in international markets



◆ **Key insight:** International shoppers want a delivery date they can rely on, along with a guarantee of what happens in case of a delay. That combination is even more appealing to international shoppers than faster shipping.

## China leads. And it has changed what shoppers expect.

The most common source for international orders is China, which accounts for 34.10%, ahead of other European countries (27.35%) and the US (9.97%). Platforms like Temu and Shein are present in every surveyed market, with Spain (40.01%) and Italy (36.46%) showing the highest Chinese import rates.

These major new competitors are putting more pressure on local European retailers. They are also reshaping what international purchasing looks like.

Chinese platforms have normalised free shipping on international orders, long but predictable delivery windows, and frictionless returns.

Chinese platforms have normalised free shipping on international orders, long but predictable delivery windows, and frictionless returns. Shoppers who regularly order from these platforms are willing to accept slower delivery in exchange for low or zero delivery costs, and they know that the entire process will be simple. If they aren't getting the same level of service and price from European retailers, they will gladly choose the Chinese competitor.

Austria (41.03%) and Belgium (37.01%) lead on intra-European cross-border ordering, reflecting their central geographic position and tight EU single-market integration.

The UK stands apart: 19.16% of UK shoppers ordered from the US in the past six months (nearly double the global average), probably because of the market's close cultural ties with US brands and the disruption of traditional EU–UK trade relationships since Brexit.

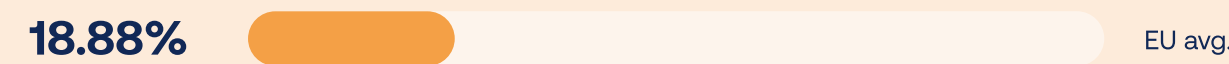


## The barriers: Surprises, not slowness

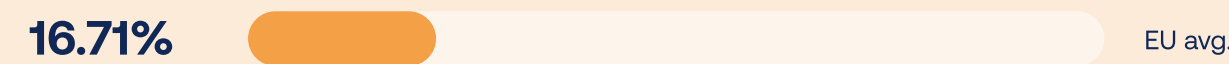
When asked what concerns them most about ordering internationally, European shoppers essentially point to a lack of transparency. That can take different forms, as these results show.

### Concerns when ordering internationally

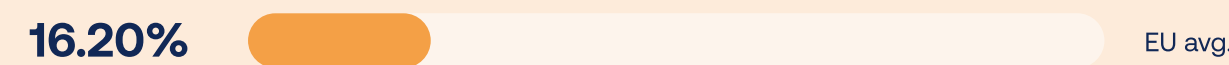
Higher delivery costs



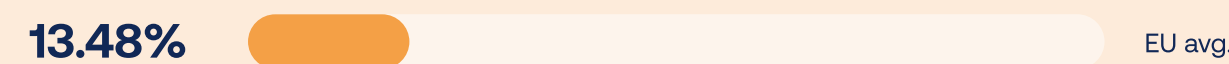
Delivery taking longer than expected



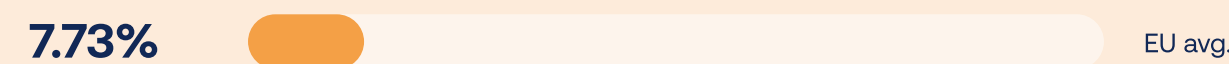
Unexpected customs duties



Complicated or expensive returns



Loss of tracking information



The top three concerns are all based on the same underlying anxiety: shoppers are willing to buy internationally, but not if they can't see what they're committing to. They will tolerate a longer wait., but they will not tolerate surprise hidden costs that only appear at the point of delivery.

Still, each country has a different set of international shipping concerns:

- **Germany and Austria:** most concerned about customs duties (18.15% and 18.57%) and complicated returns (15.44% and 15.73%). Especially Austria is a high-frequency cross-border market with real experience of what can go wrong.
- **Spain and France:** most worried about delivery taking longer than expected (18.88% and 18.01%). Speed certainty (not speed itself) is what these markets need to commit to an international order.
- **Netherlands:** leads on anxiety about loss of tracking (11.01%), consistent with Dutch shoppers' strong preference for courier-led, app-based tracking seen in Chapter 4.
- **UK:** most concerned about higher delivery costs (20.49%), above the global average. Post-Brexit complexity makes shoppers particularly sensitive to unexpected charges on international orders.

- **UK:** most concerned about higher delivery costs (20.49%), above the global average. Post-Brexit complexity makes shoppers particularly sensitive to unexpected charges on international orders.
- **Belgium:** most worried about loss of tracking (9.89%), while intra-European ordering is the most common cross-border behaviour (37.01%). Experienced cross-border shoppers who notice when visibility drops.
- **Italy:** most concerned about complicated returns (14.87%), consistent with broader sensitivity to unclear returns processes. With the highest cross-border adoption rate (73.06%), returns friction remains a key barrier.



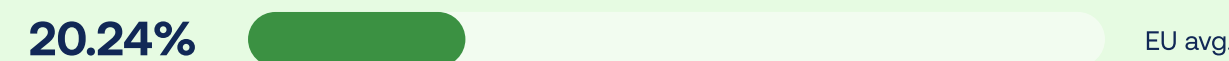


## What would make shoppers buy more internationally

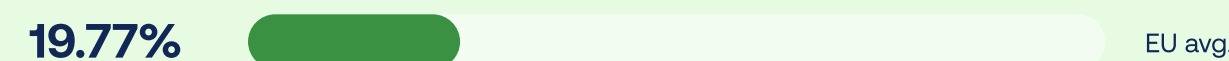
We also asked shoppers what would make them more likely to order from another country. Their answers pointed back to the same issues they had already identified as barriers.

### What would increase international intent

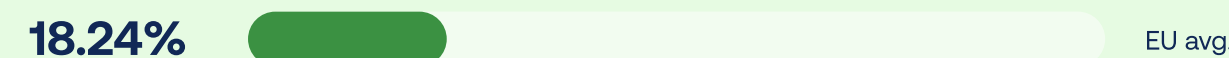
Transparent duties and taxes shown upfront



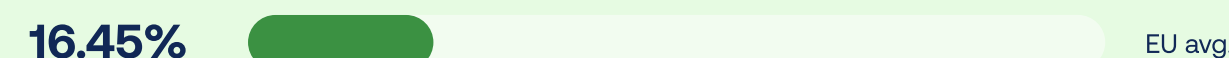
Guaranteed delivery date (with compensation if late)



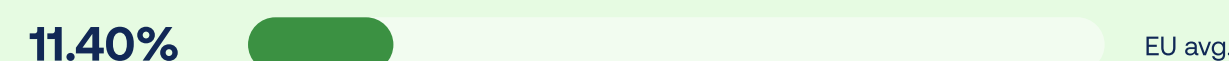
Easy returns with local drop-off



End-to-end tracking visibility



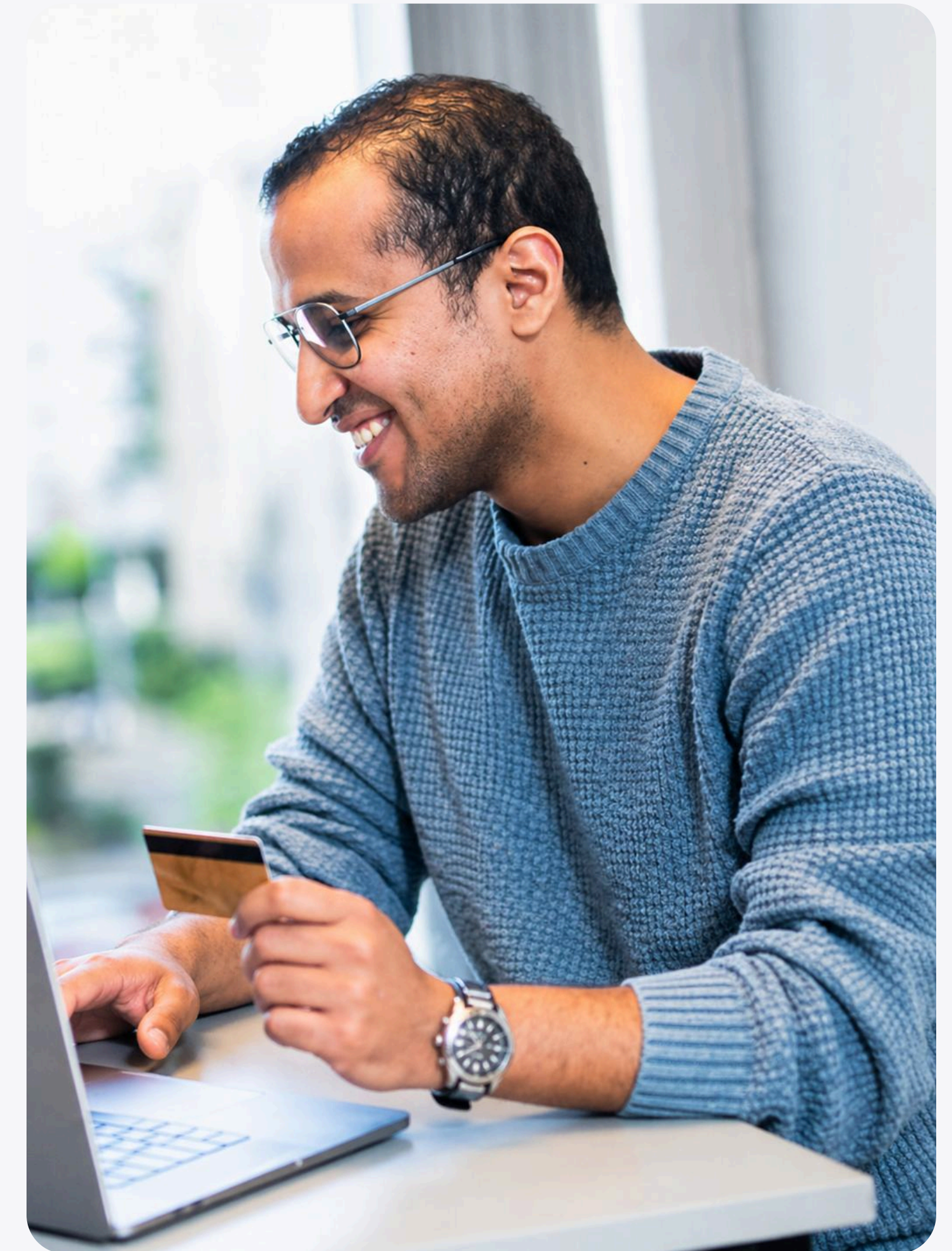
Clear customer support responsibility



It all comes down to certainty and predictability, whether in terms of cost, timing, or what happens if something goes wrong.

Again, there are some nuances to consider here, depending on your markets:

- **Germany and Austria** prioritise easy returns (21.28% and 21.61%) and duty transparency, consistent with their high domestic return rates and customs sensitivity.
- **Spain** places the highest value of any market on guaranteed delivery dates with compensation (24.31%). Reliability is the unlocking factor for Spanish cross-border intent.
- **Belgium and France** emphasise end-to-end tracking visibility (20.63% and 20.51%), suggesting that keeping shoppers informed throughout the international journey is as important as the delivery itself.
- **The UK** ranks guaranteed delivery dates as its top incentive (20.94%). For a market navigating post-Brexit complexity, reliability is a stronger conversion driver than cost transparency.
- **Italy** leans toward guaranteed delivery dates (21.52%), above the global average, with easy returns via local drop-off (19.20%) close behind. With such high international adoption (73.06%), shoppers know the risks and want clear reassurance before they commit.



**07**

**Conclusion**



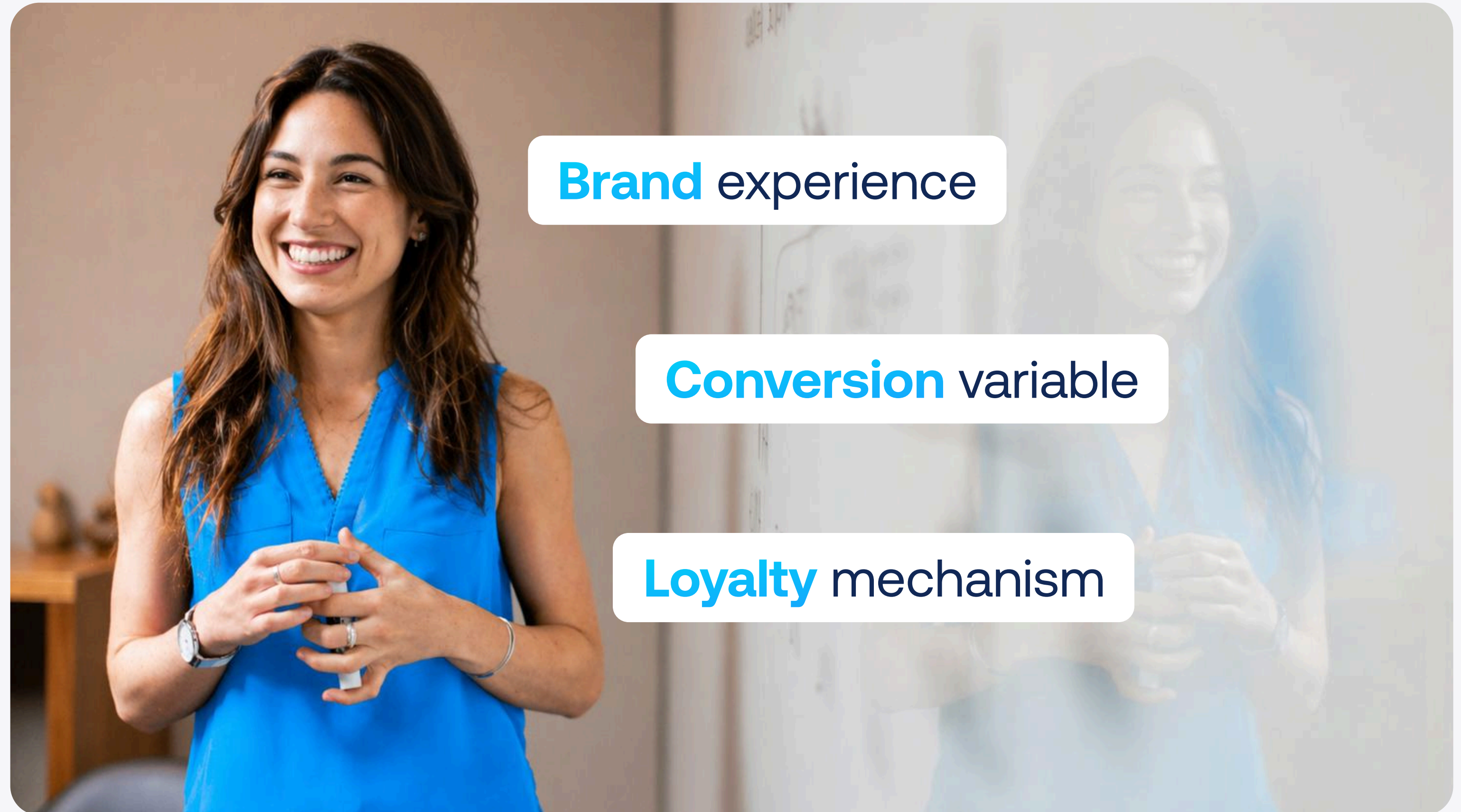
## From insights to action

### Building your Shipping Formula

Staying competitive in the European e-commerce market over the next three to five years will probably be less about choosing the fastest couriers and lowest prices, and more about understanding that delivery is a brand experience. Retailers who get delivery right treat it as a valuable part of their conversion and retention strategy throughout the entire customer journey.

Every data point in this report shows that shoppers reward certainty with purchases and punish uncertainty with abandonment. By designing your delivery experience around certainty, you can position your brand to compete against major marketplaces and platforms in the areas that matter most to shoppers.

Your Shipping Formula can serve as a framework for delivering the optimal delivery experience for your mix of markets, categories, and customers. This report gives you the consumer insights you need to start putting plans into action.





# The seven actions to get you started



## 1. Show delivery costs before the payment screen

40.70% of delivery-driven cart abandonment occurs because unexpected costs appear late in the checkout process. Customers generally won't mind paying a reasonable price for shipping, as long as you are up front about the cost before they get to the payment stage.

## 2. Offer at least one out-of-home delivery option

45.34% of shoppers used a service point, parcel locker, or local shop in the past three months. Retailers who offer only home delivery are structurally absent from how nearly half of European shoppers have organised their routines. A single well-placed out-of-home option changes that.

## 3. Treat option breadth as a conversion lever

50.51% of shoppers are more likely to complete a purchase when multiple delivery options are available, rising above 70% in France, Spain, and Italy. The perception of choice is as powerful as the choice itself. Three well-chosen options cover the vast majority of shopper needs.

## Out-of-home delivery

### 4. Own the communication layer, even when the courier delivers

42.46% of shoppers hold the retailer responsible for delivery failures regardless of who physically delivers the parcel. Proactive delay alerts are the highest-leverage post-dispatch action available: 82.96% find them useful and 76.64% are more loyal to stores that handle problems transparently. Communication is the cheapest form of retention investment available.

### 5. Localise your communication channel

Email works everywhere, but it is not the preferred channel everywhere. France needs SMS. Italy and Spain need WhatsApp. The Netherlands and Belgium favour courier tracking apps. A single-channel post-purchase strategy will consistently underperform in at least two or three markets simultaneously.

### 6. Make returns policy visible before purchase

70.73% of shoppers are more likely to buy from stores with easy returns, rising above 81% in France, Spain, and Italy. Returns policy communicates risk tolerance before the checkout is even reached. Communicating it clearly at the point of purchase converts a safeguard into a sales tool.

### 7. Build international propositions around certainty, not speed

71% of shoppers accept cross-border delivery windows of 5–14 days. The main barrier to international purchasing is uncertainty about cost, tracking, and what happens if something goes wrong. Transparent landed costs, specific delivery dates, and easy returns with local drop-off collectively address the top three concerns on international shoppers' minds.

## Proactive updates

## About this research

The E-commerce Delivery Compass 2026 is based on an online survey conducted in March 2026.

A total of 8,000 online shoppers were surveyed across 8 European markets: the Netherlands, Belgium, France, Germany, Austria, Italy, Spain, and the United Kingdom.

Each market was represented by 1,000 respondents aged 18–65 who had made at least one online purchase in the past three months.

The survey covered 28 questions across delivery preferences, checkout behaviour, post-purchase experience, returns, international commerce, and attitudes toward AI in shopping.

## About Sendcloud

Sendcloud is Europe's leading shipping platform that empowers e-commerce merchants to scale their shipping operations effortlessly and deliver a customer-first experience.

With our connected suite of tools, we centralise and automate the entire shipping process. From label creation to branded tracking, support automation and returns, enabling retailers, marketplaces, and fulfilment companies to stay ahead of consumer demands.

Founded in 2012, Sendcloud was born from a genuine need to create a level playing field for all e-commerce merchants. Backed by Softbank and trusted by 35,000+ brands across Europe, Sendcloud has the vision to solve shipping globally.

Learn more at [sendcloud.com](https://sendcloud.com)



# **E-commerce** Delivery Compass

Sendcloud 2026