

Expectations for parcel services in Sweden and Finland

Summary of consumer study results



Study on Finns' and Swedes' expectations for parcel services

Last year, we asked Finns what frustrates them the most when using parcel services, and this year, we wanted to expand our understanding to the Swedish market.

This study provides a comprehensive perspective on all parcel operators in general. In this report Matkahuolto highlights the similarities and differences between the Finnish and Swedish parcel markets.

The studies were conducted through expert interviews and surveys representing the Finnish (2024) and Swedish (2025) populations. This report presents findings that combine these results with Matkahuolto's insights.





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Shaping a better delivery experience by constantly listening to consumers and refining services

Matkahuolto is strengthening its presence in Sweden. By deepening its consumer research, it aims to bring value for Swedish e-commerce retailers operating in Finland and those expanding into the market.

As in Finland last year, our latest 2025 study on Swedish consumer expectations for parcel services highlights key frustrations and demands that directly impact trust and purchasing decisions. While progress has been made, over a third of shoppers still avoid certain parcel services due to negative experiences—underscoring the ongoing need for improvement.

Failing to meet consumer expectations results in lost revenue and reputational damage for both retailers and parcel operators. While both Swedish and Finnish consumers demand convenience, speed, and flexibility, their expectations and frustrations also differ. To remain competitive, we must align our services with the lifestyles of today's consumers rather than expecting them to adapt to us.

This study aims to serve as a guide for Swedish and Finnish e-commerce retailers and Matkahuolto, driving our collective efforts to improve reliability, reduce frustrations, and minimize those frustrating 'Where is my parcel?' moments.

Finns' and Swedes' expectations for parcel services –Study | FIN N=1000 SWE N=1000

* Most Valued Brands 2024 –Study, Taloustutkimus and Alma Media



As Finland's most valued parcel brand, we continue to see this as motivation to keep improving. The customer experience is a journey of continuous development.

Kati Nevalainen
Director, Parcel Services
and Service Point Network

Matkahuolto

Execution of the study

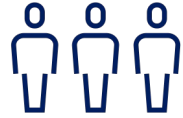


Executed by Frankly Partners

The overall study was conducted by Finnish customer-centric agency Frankly and it was commissioned by Matkahuolto.

frankly

Frankly Partners helps companies and organisations grow their businesses by understanding how people choose and how we can affect their attitudes, behaviour and choice. franklypartners.fi



A population-representative study

The survey was conducted by Bilendi Finland's panel in April 2024 and Sweden's panel in February 2025. The respondents consisted of a sample of adult Finns and Swedes by gender, age and place of residence. Number of respondents by country: N=1000.

Margin of error for total
The sample contains +/- 3%.



Experts and online stores

In addition to the surveys, we conducted interviews with experts and online stores

Jukka Häkkinen, psychologist

Leevi Parsama, Chairman of the Board,
Digital Commerce Finland

Lasse Mitronen, Professor of Practice, University of Tampere

Arhi Kivilahti, Founder, State of Store & Ada Insights

Johanna Rantala, CEO, Scandinavian Outdoor

Jani Miettinen, Logistics Coordinator, LashLovers

Svante Lindgren, Director of Logistics & Operations, Matsmart

Emelie Ekholm, Swedish Research analyst, HUI Research

Markus Trautmann, Logistics expert, iBoxen

The study is part of our initiative:

Where is my parcel?

If you run an online store, you've got that question a lot. Or if you have ordered from an online store, you might have asked it yourself. Usually, parcel services companies like us are responsible for the answer. That's why we started the 'Where is my parcel?' initiative last year to make things better. We researched the pain points in the industry and found out what annoys people the most in Finland. As promised, we are continuing the initiative. In 2025 we researched Swedish consumers and compiled the two studies to compare the similarities and differences, helping both us and e-commerce retailers in both countries better adapt to consumer lifestyles.



Parcel services market comparison study report





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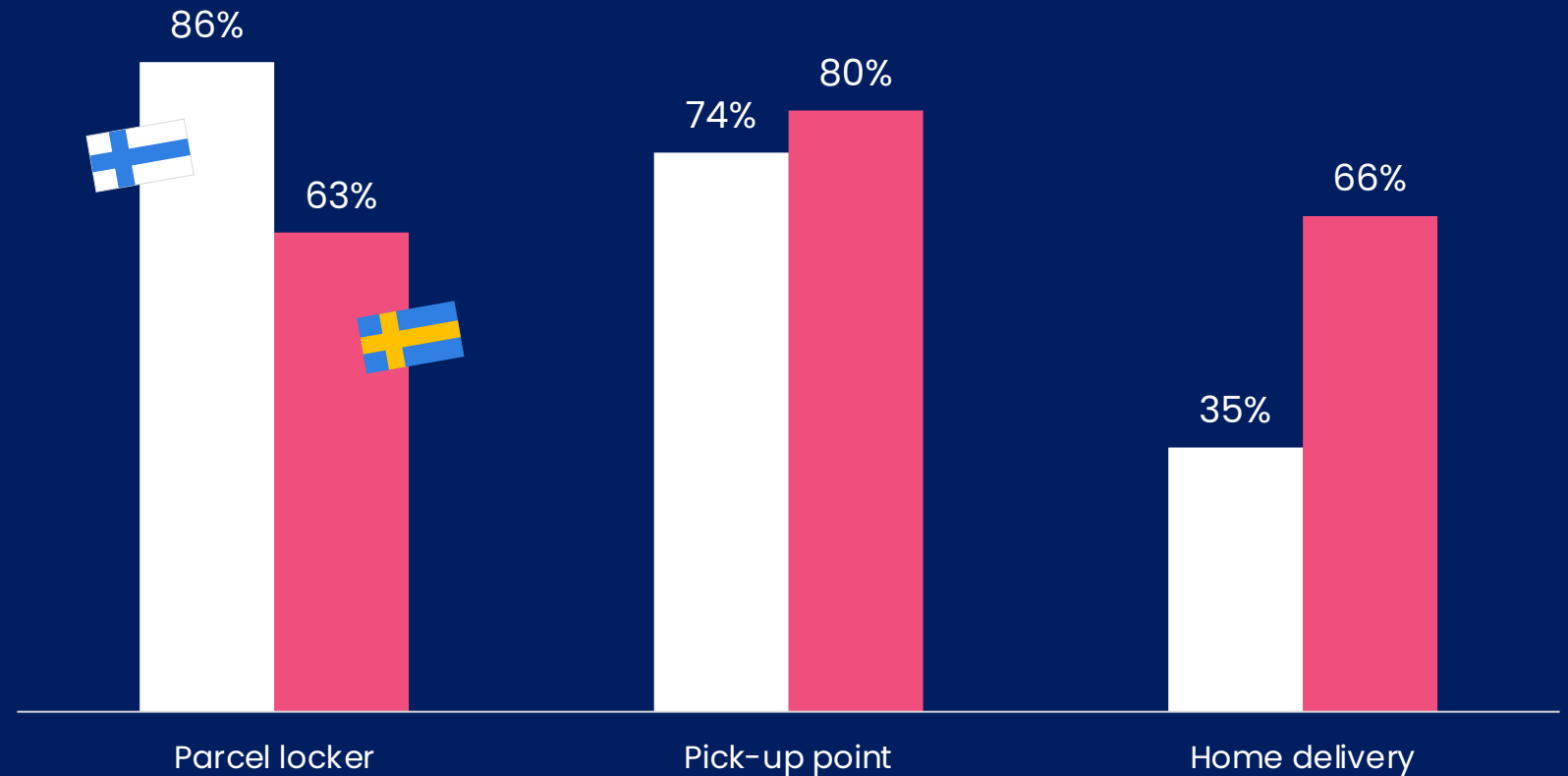
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We receive parcels in different ways

In Sweden, home deliveries are very common, used by 66% of the population, whereas in Finland, only 35% use them. In Finland, parcel lockers are the norm, with 86% of the population using them.



We get frustrated by different things



Delivery location

“Arranging a specific parcel pickup location then having it delivered to a random locker makes me super ANGRY and FRUSTRATED. It is a waste of valuable time, especially with young kids and a busy life.”

Response from the consumer survey, Finland



Delivery time

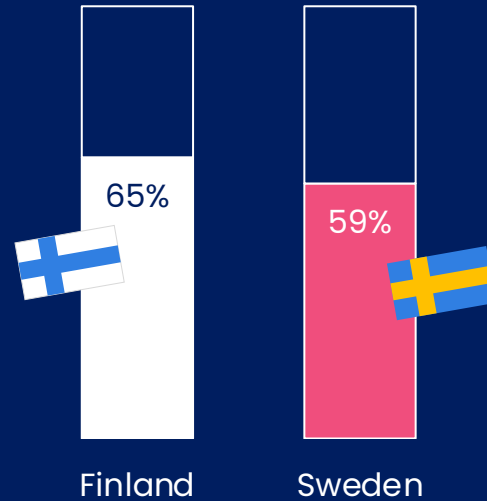
“I hate it when the delivery time keeps changing. It’s so FRUSTRATING not knowing when my parcel will actually arrive, especially when I’ve planned my day around it.”

Response from the consumer survey, Sweden



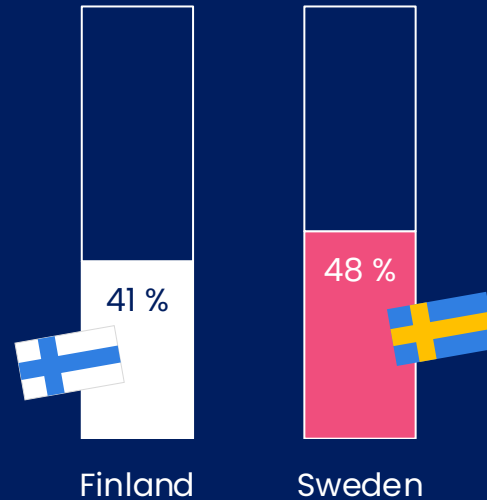
We both share bad personal experiences with parcel services and deliveries.

It affects our trust in the parcel industry.



Bad experience

Among the most active online shoppers, those who order approximately once a week, 65% in Finland and 59% in Sweden have experienced uncertainties or problems with their deliveries.



Unreliable

In the studies, 41% of Finns identified an unreliable delivery company, while in Sweden, the figure was 48%.

Our circumstances are quite different

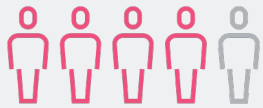
Volume and maturity

60%



Over half of Finns shop online monthly, totalling approximately 3,383,200 individuals.

79%



A clear majority of Swedes shop online monthly, totalling around 8,335,800 individuals.

Sweden's market is approximately 2.5 times larger than Finland's, and the number of delivery operators is also higher in Sweden.

Delivery method

We are accustomed to different delivery and return methods. In Sweden, home delivery is clearly more common, while in Finland, parcel lockers dominate.

In Sweden, the omnichannel approach appears to be more advanced, with physical stores frequently serving as delivery locations and return points.

Parcel locker

63%



Home delivery

66%



"Where is my parcel" – in FI & SWE

Due to differences in delivery methods, our expectations of parcel service tracking vary.

In Sweden, where home deliveries are the norm, **real-time tracking of parcels is standard**, and one of the main frustration with deliveries is **changes to the delivery time** along with the prices.

In Finland, where parcel lockers are more common, expectations for real-time tracking appear to be lower. However, the primary frustration is **changes to the delivery location**.

69%

of Swedes want the ability to track their order in real time through a mobile app.

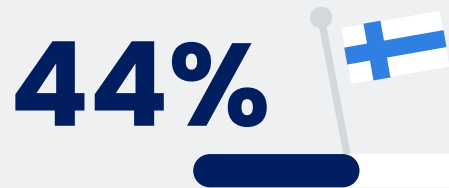
48%

of Swedes expect to be able to change the delivery time or location through a mobile app.



But our relationship with the industry is very similar

Our level of trust



I would not dare to order a home delivery by leaving the parcel behind my door.



Swedes are slightly more trusting in their behaviours

In general, what are the things that frustrate you the most about parcel deliveries or shipments? Choose up to three of the most frustrating. | Multiple choice.

Our overall experience

We asked an open-ended question about what frustrates the most about parcel services. The responses can be summarized into three themes:

- 1 Delivery Location:** Finns frustrated by changes; Swedes less concerned.
- 2 Pricing:** High fees frustrate Swedes more; Finns focus on **reliability**.
- 3 Customer service when problems occur:** Swedes demand more personalized service; Finns are more accepting towards automation.

What frustrates you the most about delivery services? | Open



Integration to everyday life

To thrive in the demanding markets, we must focus on seamlessly integrating our services into consumers' daily lives, minimizing any inconvenience, building trust and minimising stress through reliable and transparent operations.

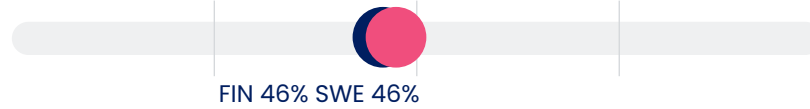
The sense of control, trust and stress is in the same level as in Finland regardless higher service level in Sweden

Same results

Under no circumstances do I want to discuss my package delivery with a chatbot



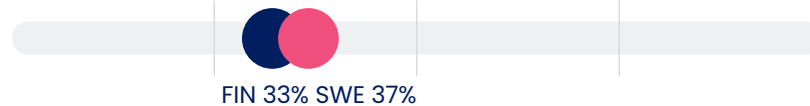
I have enough control over which company delivers my parcel



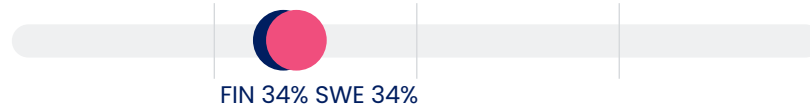
Bad experiences with a supplier



Package supplier does not matter



I cannot trust the estimated delivery times or locations of parcel



I feel stressed about parcel delivery



I don't get enough information about where the parcel will be delivered

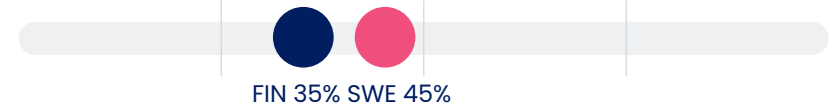


Differences

I would not dare to order a home delivery by leaving the parcel behind my door



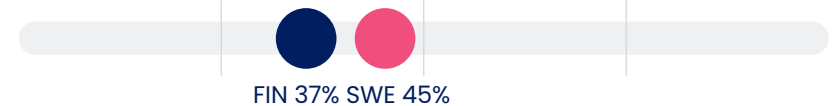
I will avoid choosing a particular parcel delivery company



Communication from parcel delivery companies is unclear



I think I will use more parcel delivery companies in the future



I do not receive enough information about the delivery time of my parcel



I think certain parcel delivery companies cheat their customers





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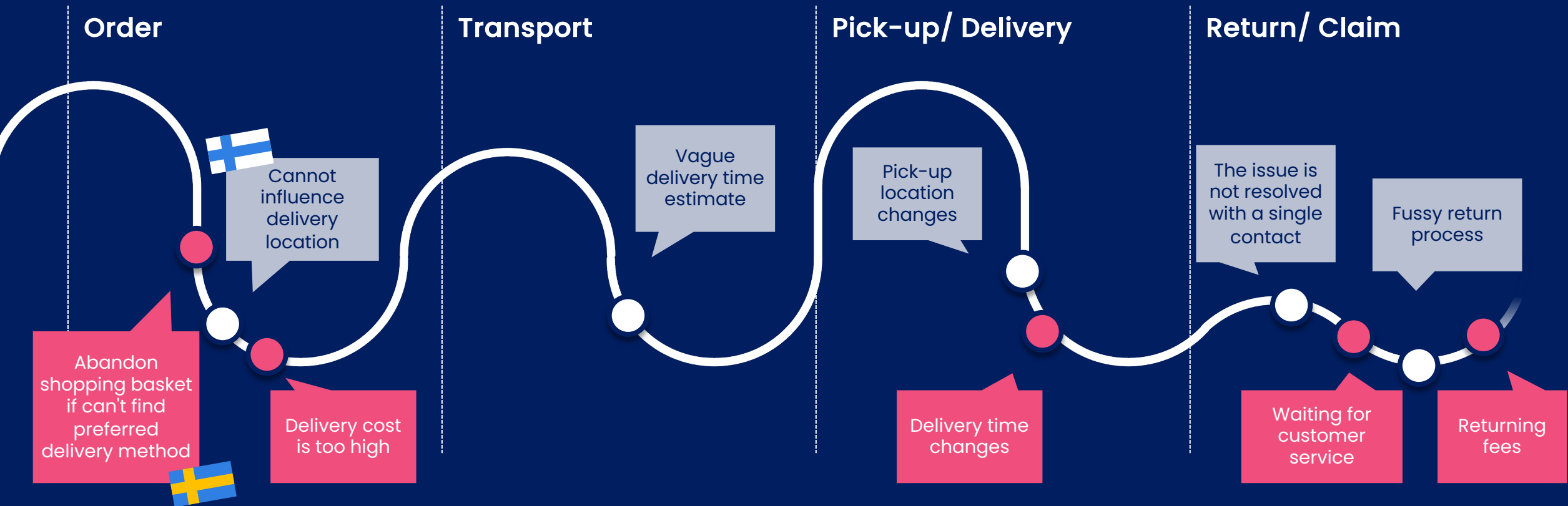
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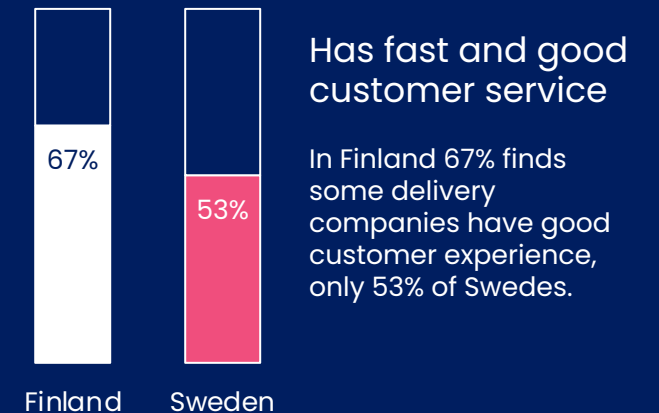
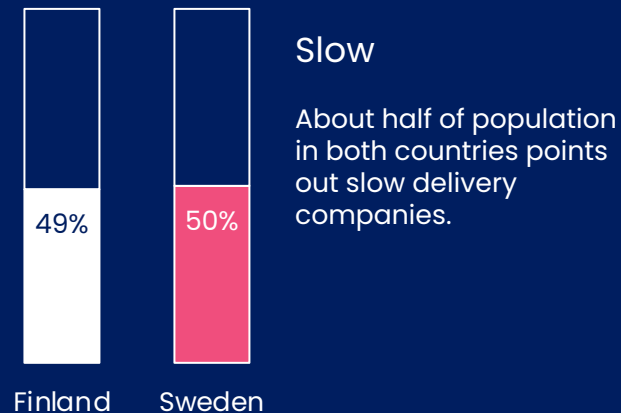
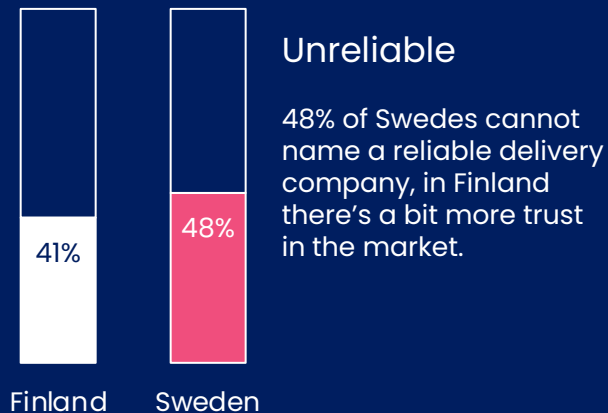
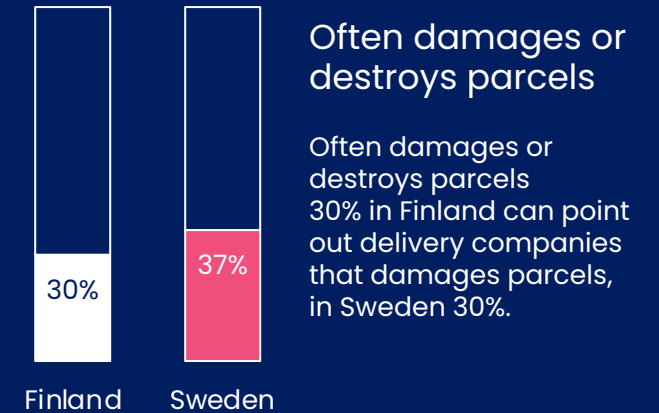
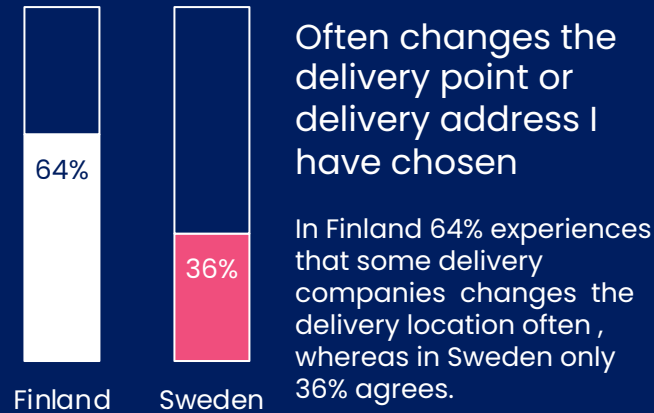
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Our frustration points differ



Experience of companies



Finns are more stressed due to changes, Swedes about lost and damaged parcels



1

Stress due to changes, especially regarding the delivery location.

2

General dishonesty, which breaks the trust.

3

Poor communication from customer service, particularly when issues arise.

What frustrates you the most about delivery services? | Open



1

Lost parcels and damages creates stress and concern, especially when ordering higher value products.

2

Difficulty in reconciling delivery times with your own schedule.

3

Lack of personalised customer service is a big frustration point, chatbots are particularly annoying.

What frustrates you the most about delivery services? | Open

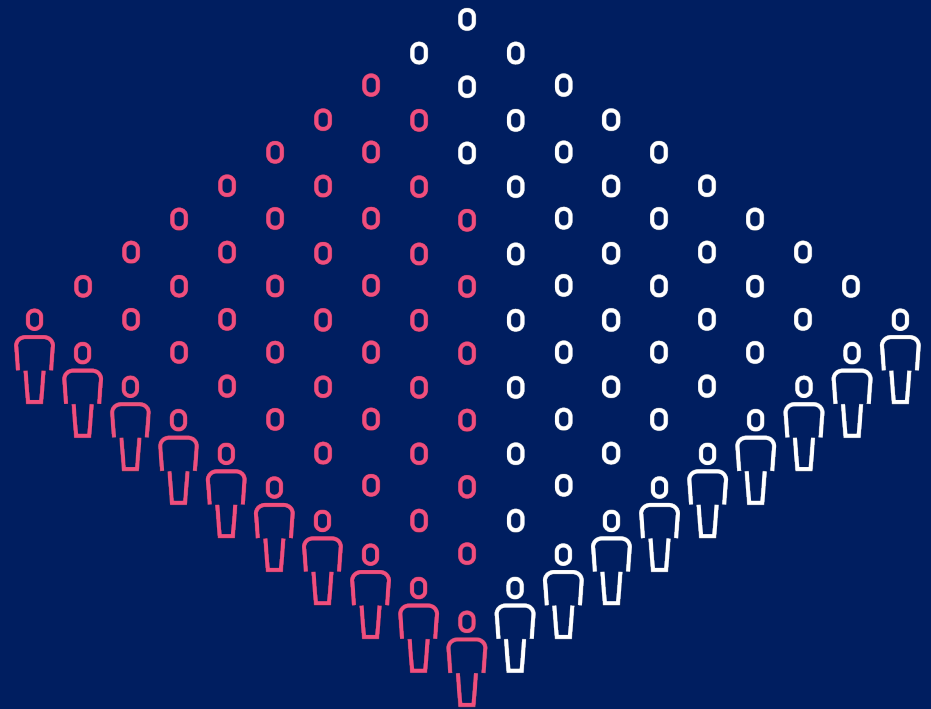
"Traceability and transparency are very important. Being able to track the parcel and know exactly when it's going to be delivered is crucial. Keeping that promise from the delivery firm is essential for customer satisfaction."

Emelie Ekholm
Swedish Research analyst
HUI Research

40% of Finns



... and 51% of Swedes have had a damaged or lost parcel at some point



40% of Finns and 51% of Swedes have had a damaged or lost parcel at some point

What happened to the parcel?

The lost parcel was never found



The damaged parcel was not compensated (by the parcel service provider or the online store)



The lost package was found and delivered later



How was the customer service experience?

The online store handled the situation well (e.g. compensated for the product)



The parcel service provider's customer service was bad



The parcel service provider handled the situation well (e.g., compensated for the product)



The online store's customer service was good



The online store's customer service was bad



The parcel service provider's customer service was good



■ FIN
■ SWE

When problems occur, Swedes are more demanding, expecting a quick response

What frustrates or would frustrate you the most in problem situation?

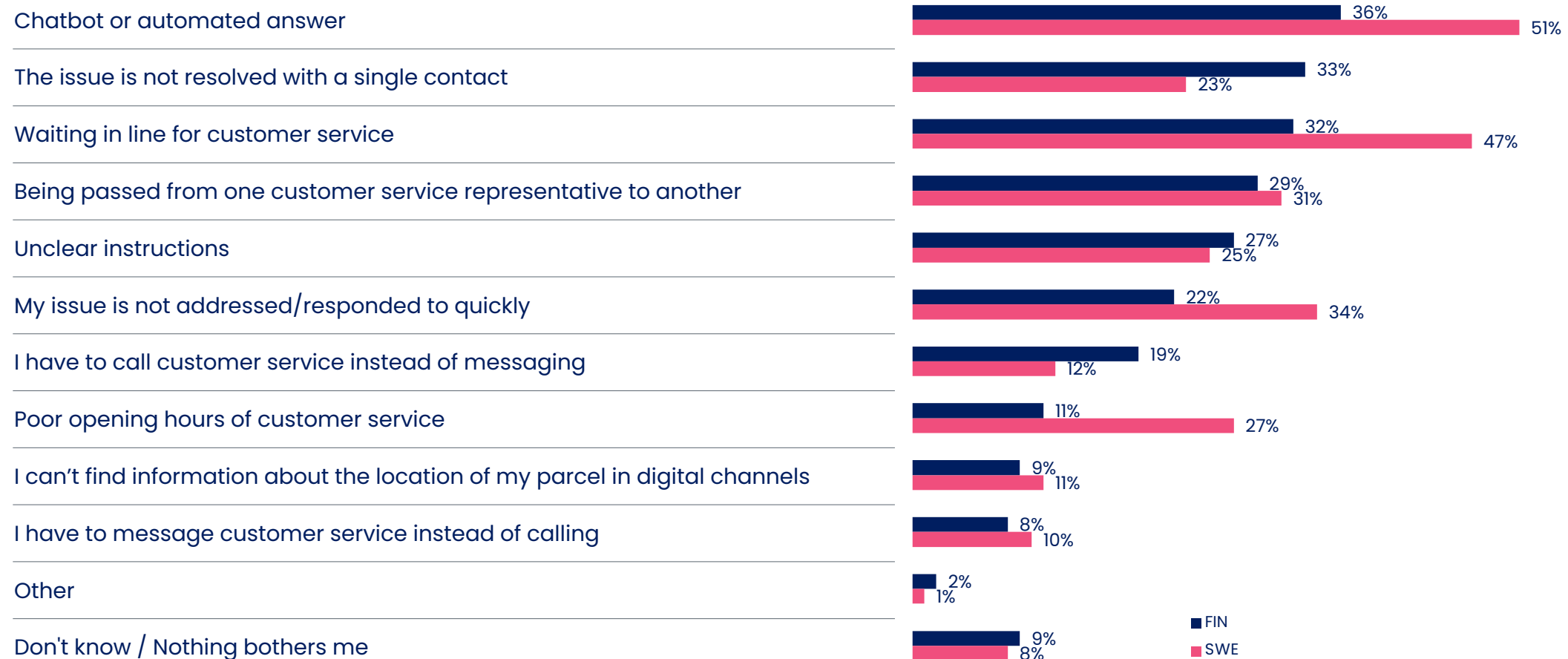




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From waiting to demanding: How customer expectations are shaping deliveries

“ Ten years ago, we had to adapt our lives for deliveries, like staying home when the parcel was arriving. But now, we expect delivery companies to adapt to our lifestyles and needs, making them convenient, fast, and flexible.”

–Emelie Ekholm, Swedish Research analyst, HUI Research

“ In today's world, people optimize their daily lives enormously. Scheduling is more or less inherent to each of us; we strive for information economy and try to make things as easy as possible by avoiding overload. And when there's a glitch in the system, our patience wears thin – even if the package is just moved to a locker 200 meters away.”

–Jukka Häkkinen, Psychologist

We asked, consumers told us what makes the ideal customer experience?



Sweden is ahead, still
46% thinks that no
operator is providing
easy service

Cheap and fast

Delivery costs should be reasonable or included in the price of the product.

Tracking and clear communication

Real-time tracking, to see the exact location of the parcel and the estimated delivery time and information about delays.

Flexibility

Customers want the flexibility to choose and change the place and time of delivery from a wide selection.

Reliability and punctuality

Packages must be delivered intact, at the right time and to the right place together with careful packaging and handling.

Personalised service

Easy contact with customer service, preferably via real-time chat, connecting with a right person.

Sustainable

Environmentally friendly transport options and packaging are increasingly important.

Bigger issue
in Finland



Bigger issue
in Sweden



Adapting to consumer lifestyles: A to-do list for e-commerce and delivery success



1

Provide flexible delivery options that fit customers' daily lives

- Offer multiple delivery choices: parcel lockers, pick-up points and home delivery
- Allow customers to choose pick-up points and delivery times easily to enhance the sense of control.
- Enable real-time tracking with clear ETAs **to reduce uncertainty.**

2

Ensure speed and reliability to build trust

- Improve delivery place and time accuracy to reduce "Where is my parcel?" moments.
- Provide proactive updates on delays and changes **to manage expectations and build trust.**

3

Simplify returns to remove purchase barriers

- Offer hassle-free, cost-transparent return options **to reduce hesitance towards buying.**
- Introduce drop-off points in convenient locations.
- Communicate return policies clearly already on the website before the purchase process.

Experiences of damaged or missing parcels in relation to Matkahuolto's performance

Experiences in Finland and Sweden



17% **32%** The parcel has gone missing*

33% **39%** The parcel has been damaged*

43% **40%** I have a bad previous experience with a parcel delivery company**

Matkahuolto's performance

Redirecting **14,1%**

Gone missing **0,024%**

Damages **0,010%**

Breakages **0,010%**

Going well, but we can do better

At Matkahuolto, we are constantly developing new

We've developed advanced services to better meet our customers' needs—but we're aiming even higher. And so can you, if you run an online store delivering to Finland.

Enhance your customer experience by offering a wider range of parcel service providers and delivery options, allowing your customers to choose the best solution for themselves—along with any additional Matkahuolto services they might need.

Matkahuolto aspires to be the number one delivery partner between Sweden and Finland through close collaboration with e-commerce and retail companies.

Happier customers with the Paketit app

After you ship the parcel, it's easy for your customers to track the delivery with our Paketit app. Also, customers can get assistance if problems occur and can order various additional services, such as changing pickup points or requesting home delivery.

Minimized frustration from changing pickup points

46% of Finns are annoyed when the pickup point for their parcel changes. That's why we are publishing up-to-date information on the most- and least congested pickup points in our network.

We are the most valued parcel brand in Finland

According to the annual brand appreciation study by Taloustutkimus and Alma Media, we were also the most respected parcel service brand in 2024, a position that we aim to maintain also in future.

We are seen as the most sustainable parcel brand in Finland

We are proud of the recognition, but our commitment to sustainability does not end here, on the contrary. We achieve our ambitious sustainability goals through concrete and measurable actions instead of talk.

Sustainable Brand Index 2025



More parcel pickup lockers and better service

According to our study majority of Finns prefer to collect their parcels from parcel lockers. As we aim to serve our customers better we are expanding our network of parcel lockers constantly.



The Better Way