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Ecommerce Consumer Habits Review - Denmark

H1 2023 - January to June



Entering the Danish Ecommerce Realm: Discover Trends

Welcome to the Half-Year Ecommerce Consumer Habits Review for Denmark, a concise exploration of the evolving Danish ecommerce landscape.

In this report, we will present key highlights, changes in monthly habits across physical goods, services, and travel sectors, and the robust research methodology that underpins our findings.

1. The Research: Methodology

To ensure transparency and reliability, we'll detail the methodologies used in data collection and analysis.

2. Highlights: Growth and Spending Comparison

We'll begin by examining the growth and spending trends in the Danish ecommerce market, providing insights into the driving forces behind its success.

3. Monthly Habits: Changes in Consumption

Next, we'll delve into how the digital age, the pandemic, and shifting travel behaviors have influenced spending habits in the physical goods, services and travel verticals.

Join us on this journey as we uncover the evolving dynamics of Denmark's ecommerce sector, offering valuable insights for businesses, stakeholders and other ecommerce players.

About the research

Nets, a part of Nexi Group, is proud to present the **Ecommerce Consumer Habits Review - Denmark**. This report analyses the challenges, conditions, and opportunities for Ecommerce in the Nordics.

The report is based on results from surveys conducted by Kantar on behalf of Nets in the form of 50 weekly interviews among 1.669 Danish internet users from January until June 2023.

Respondents throughout Denmark, Norway and Sweden participated in the research.

Respondents were taken from each region's local population, in the age group of 18–79-year-olds who have internet access. Each response was weighted by age, gender, and region, and takes into account accumulated composition.

The research report is based on two main parameters: **spending and habits**.

Spending is a parameter based on survey respondent's response on the approximation of money spent on a specific category over the previous 28 days.

Estimates of total online consumption are based on the median value times the number of people shopping online in each category. The advantage of this method is that the median is less sensitive to extreme fluctuations, so it provides a more accurate picture of typical consumer behavior.

Habits of each user were based on their shopping activity over the previous 28 days. Throughout the survey, the majority of questions offered the possibility to choose multiple answers which was then calculated to represent their online shopping habits.

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Discover Trends



What does the progress look like?

+11%

Growth in spending
2021 vs. 2022

+18%

Growth in spending
H1 2022 vs. H1 2023

+39%

Growth in travel spending
H1 2022 vs. H1 2023

Adapting back and moving forward

Ecommerce showed robust growth in 2022, defying the challenges presented by the pandemic. But what do the numbers look like in H1 2023? We compared the difference, revealing a significant uptick.

Overall, we've noted considerable growth in the first half of the year, with an underlying 18% of growth on an overall base.

The most significant change is to be found within the travel vertical, witnessing remarkable growth of 39% - reflecting how influential this area will become as we move forward through the rest of the year.

Spending compared across sectors

A return to old habits

The lingering effects of the pandemic and inflation challenges in Europe had a massive impact on customer behavior in 2022. However, enough time has now passed to allow assessment of what grew, what shifted, what declined - and why.

Shoppers returned to the outside world and overall spending was up, yet we still saw a decline in physical goods purchases such as clothes, groceries and household appliances. The demand for services held steady, however it appears travel, up 7 percentage points, is the new essential requirement in a re-opened, post-COVID world, with the sector seeing some serious upward momentum.






And halfway through 2023, we can already see the trends continuing from 2022 - even amplified across some countries and industries.

Comparison of spending distribution in H1 2022 vs. H1 2023



Physical Goods

Top 3 monthly habits compared

H1 2022	H1 2023
 32.0% Clothes	 28.3% Clothes
 20.8% Takeaway food	 20.2% Takeaway food
 16.2% Groceries	 14.8% Beauty products

It's looking good for the beauty industry

Taking a closer look at online purchases from H1 2022 to H1 2023 reveals some intriguing shifts in preferences. Clothes and takeaway food, historically strong contenders, saw a slight decrease in market share, dropping from 32.0% to 28.3% and 20.8% to 20.2% respectively.

But the most striking change was the replacement of groceries, making up 16.2% in H1 2022, with beauty products at 14.8% in H1 2023. While groceries have experienced a decline in popularity, they maintain a significant presence, securely holding their position as the 5th most frequent purchase in our monthly shopping habits with 13.9%.

This is most likely explained by a behavioral shift during COVID-19 times, when people were buying groceries online to avoid crowds and remain at home as much as possible. Now, the shift towards beauty products reflect a return to normal values, as self-care and personal grooming become important factors once again in a reopened, social world.

Physical Goods

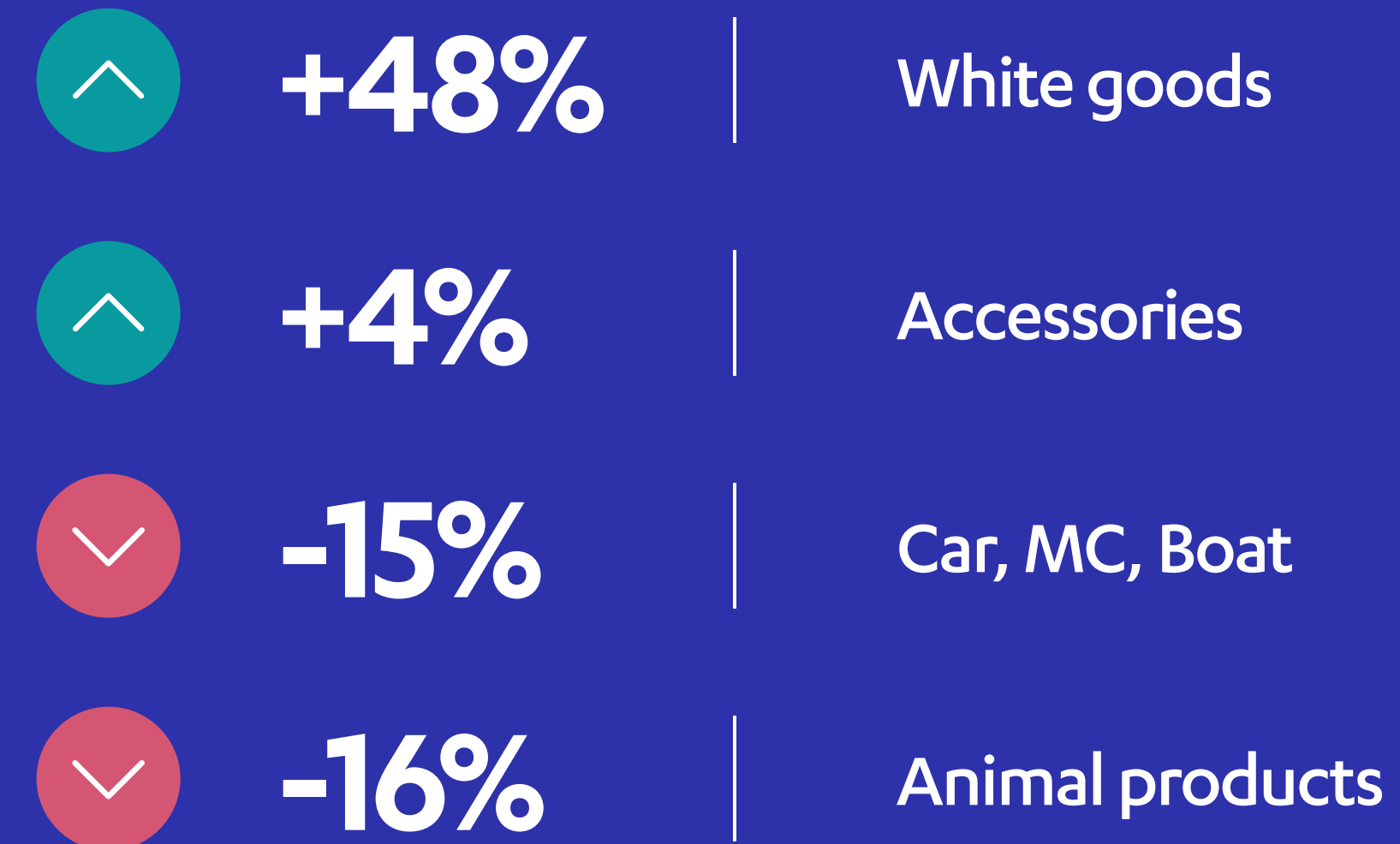
Home essentials are still essential

While there has been a noticeable shift away from traditional physical goods, a significant number of people are still purchasing them on a monthly basis. White goods have seen an increase in the percentage of monthly buyers, although the overall figure remains relatively low at just 2.3% of the population.

The decline in animal products at minus 16% is most likely a result of rising food prices and shortages due to Russia's on-going invasion of Ukraine - and inflation/a wariness of new eco-friendly models may very well have held back new purchases in the motoring/private vehicle sector, resulting in an overall decline of 15%.







Whether it's a move away from traditional physical goods or a decline in niche categories, it's clear to see that the Danish consumer base is constantly adapting and evolving their preferences to fit their lifestyle and values.

Biggest changes in H1 2022 vs. H1 2023



Services

Top 3 monthly habits compared

H1 2022	H1 2023
 53.7% Streaming services	 54.4% Streaming services
 19.1% Tickets	 23.4% Tickets
 15.7% Membership (Gym)	 16.9% Membership (Gym)

Sell out tickets and sweating it out

In a compelling shift from H1 2022, all top three categories have seen a notable increase in online engagement during H1 2023.

Top categories in the service area remained consistent - with culture and sporting event tickets, gym membership and streaming services holding fast. The market data shows that Denmark in particular spent more on streaming services than most other European countries.

An increase in the sale of event tickets (23.4% up from 19.1%) and gym memberships (16.9% up from 15.7%) are not surprising trends, as more Danes get out and about, taking the opportunity to spend more on socialising and taking care of their health in a post-pandemic world.

Services

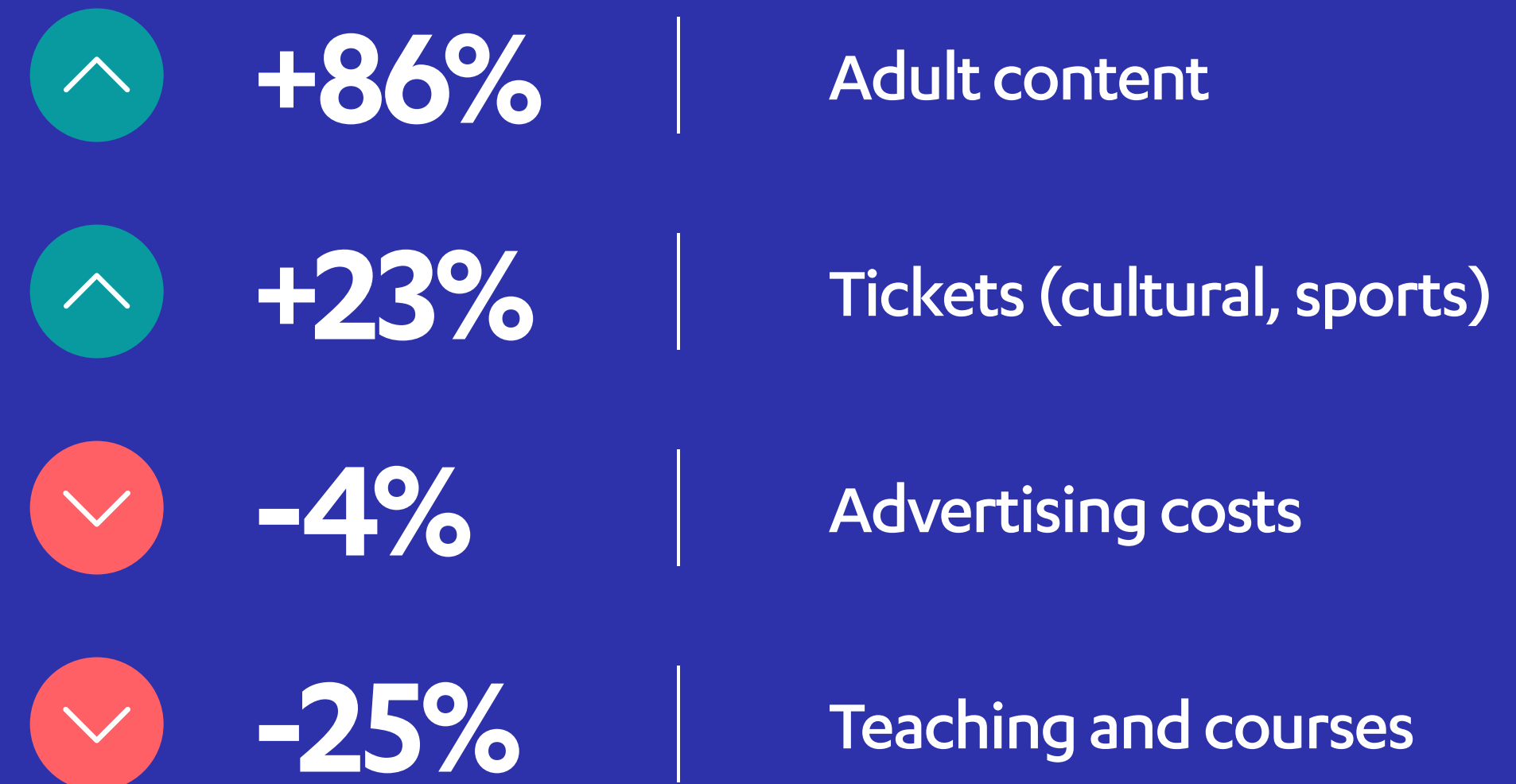
Exploring new avenues of entertainment

While the share of spending across the top three monthly habits remains relatively constant, it's the area of entertainment that is most notable here.

Adult content is one of the least frequented services in Denmark, with only 1.2% of people purchasing it on a monthly basis. However, it represents the most significant change observed in the first half of the year with an increase of 86%.







Up 23%, demand for tickets has boomed, indicating a renewed passion for fun, excitement and new experiences. From the rowdy camaraderie of football championship matches to the joy of discovering an up-and-coming live band, more people are purchasing tickets on a monthly basis.

Biggest changes in H1 2022 vs. H1 2023



Travel

Top 3 monthly habits compared

H1 2022	H1 2023
 17.0% Parking	 18.6% Parking
 16.9% Transport tickets	 18.6% Transport tickets
 9.4% Hotels	 12.9% Hotels

A lot of movement across top travel spends

We've seen the most movement within the travel sector in 2022, as the post-COVID travel bug spread around Europe - and particularly noteworthy is the substantial growth in hotel purchases on a monthly basis with a change of 38%.

However, amongst the travel boom, the daily routine still remains a focal point of online spending, with parking and commuter travel tickets holding fast as a key monthly outlay.

This trend underscores the refund balance between accessible and aspirational travel, where hotels feature prominently, and the continuing need for routine daily transport solutions.



Travel

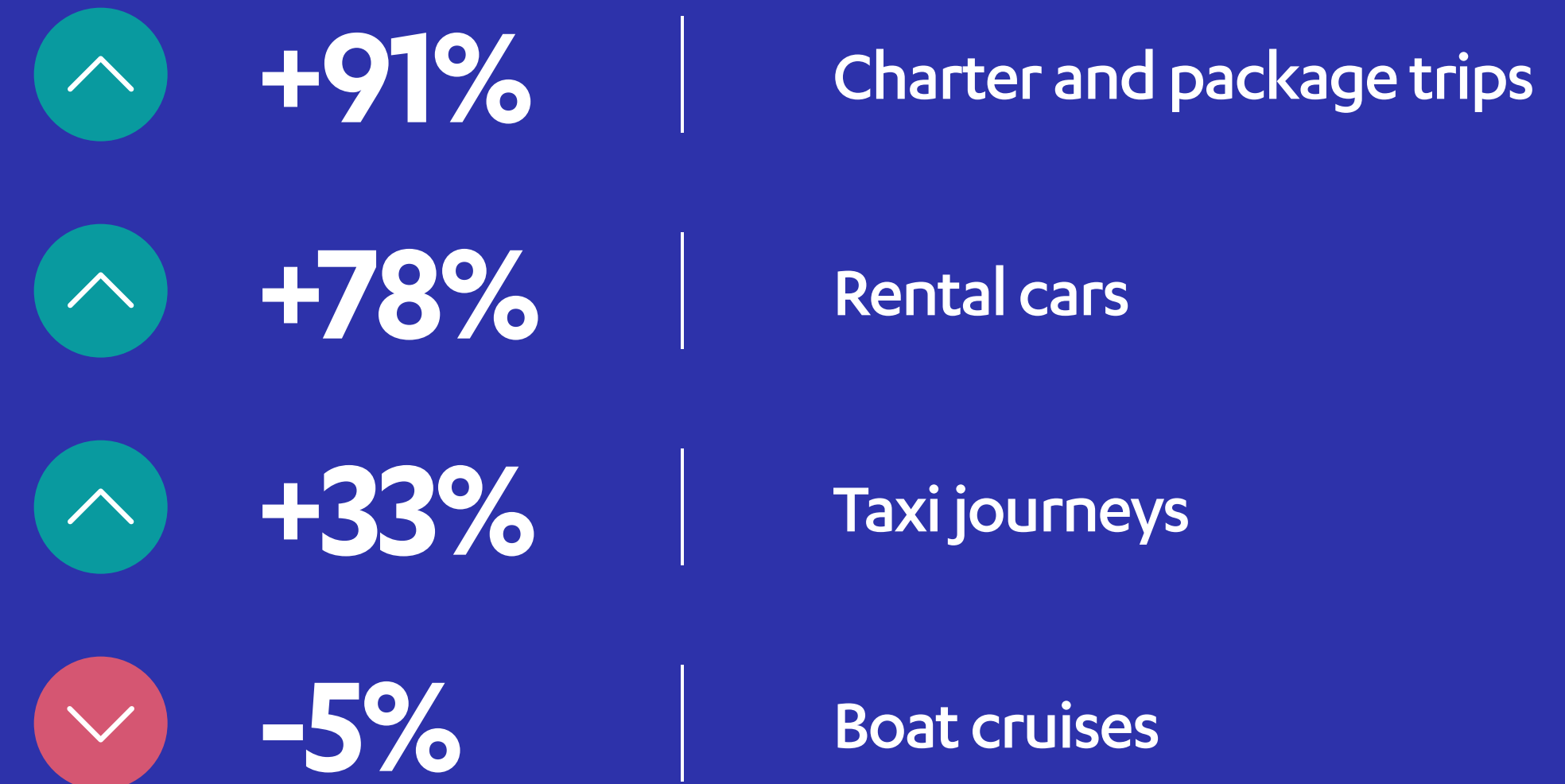
More demand for the full package

Within Denmark (and other Nordic countries), consumers have fully embraced different travel opportunities with charter and package trips seeing a massive upturn at 91%.

Market data shows that spending on hotels might be lower than the rest of Europe, but still remains a priority for the Danes - while the increase in rental cars perhaps correlates with the downturn in spend on new vehicles overall. It also signifies the growing need for flexible and convenient modes of travel, allowing individuals to explore destinations at their own pace.

The decline in boat cruises might very well be linked to another post-pandemic effect, after so many reported incidents of COVID-afflicted and quarantined leisure ships, putting consumers off from this particular type of holiday/accommodation.

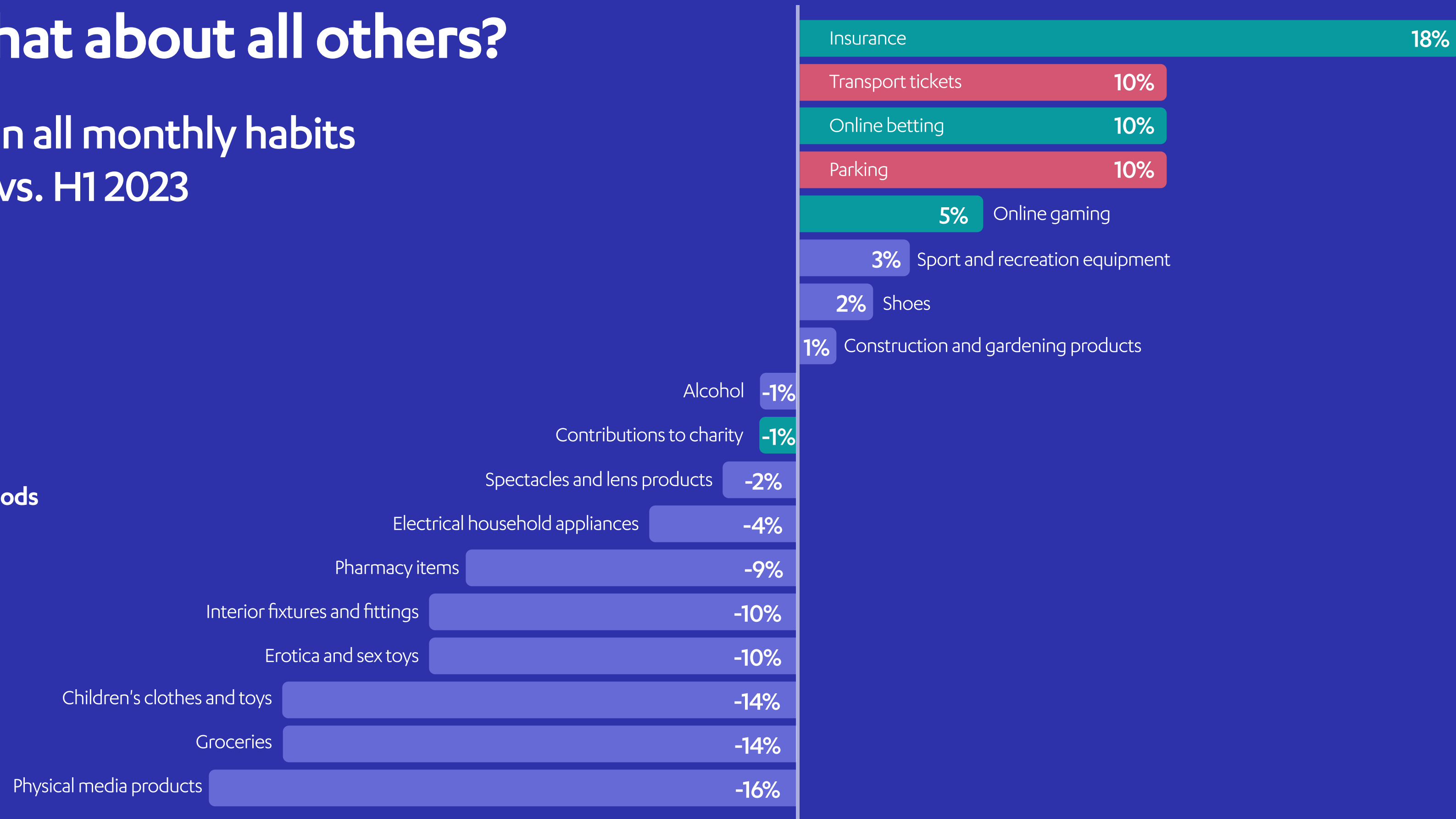
Biggest changes in H1 2022 vs. H1 2023



And what about all others?

Changes in all monthly habits - H1 2022 vs. H1 2023

- Travel
- Services
- Physical goods



Summary of changes and behavior: a comforting return to normal

Throughout H1 2023, we've seen a reassuring return to 'normal' online spending habits, as Danish consumers began to feel comfortable enough to go back to life as it was before the impact of COVID-19.

Shifts in habits that correlated to pandemic behavior changes for personal safety or due to societal expectations have realigned themselves - for example, in the way people are no longer choosing to (or indeed having to) buy groceries online.

As to be expected, the appetite for more ambitious travel plans and experiential events has boomed, as consumers find themselves making up for lost time, hungry for opportunities to socialize and enjoy time spent together once again.

With a general sense of renewed vigor for what was lost over COVID-19 times, we can perhaps expect these areas of spending to continue to hold fast over the coming months - with the data across each sector getting closer to what we were witnessing pre-pandemic, as we move further away from those incredibly challenging few years for us all.

Thank you for reading

Thank you for your interest and engagement with our report, showcasing Nexi Group's thought leadership and dedication to innovation in the realm of digital payments. Our goal is to provide you with valuable insights and a deeper understanding of the evolving payment landscape.

Continuation of our Ecommerce report with 10+ years of publication, in 2023 we are committed to present new data and insights in a more frequent and versatile way.

Our forthcoming research will shed light on the evolving landscape, providing valuable perspectives that aid businesses in tailoring their strategies to effectively serve diverse consumer demographics.

Thank you once again for engaging with our report. Stay ahead of the curve, expand your knowledge and be inspired by subscribing to our Newsletter. Join our community of avid readers who are passionate about staying informed and engaged.

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