

E-commerce in the Nordics

2024

SPRING



postnord

Helping you keep up with conscious consumers in the Nordics

Consumers are becoming increasingly experienced and choosy in their online shopping habits, seeking diverse delivery options, flexible payment methods, and seamless international deliveries. This report aims to provide valuable insights to help you stay up to date with consumers' evolving preferences.

After years of exceptional e-commerce growth worldwide, especially during the pandemic, there was a slow-down, and some markets even faced negative growth. Challenges like inflation, high interest rates, and subdued household demand affected all Nordic retail markets last year. The good news is that the outlook for 2024 is more optimistic, with Norway and Sweden expected to recover, Denmark remaining resilient, and Finland's economy likely to bounce back.

The Nordic region is often viewed as a single market. However, as this report shows, there are significant country-specific differences in consumer preferences, including delivery methods.

The report also shows that although shopping from neighboring countries remains popular, purchases from outside the Nordics are increasing, with major players Zalando, Amazon, Shein, and Temu gaining traction.

Another notable trend is the growing interest in buying second hand online, especially clothing and footwear, driven by budget- and eco-conscious consumers. Sustainability influences online shopping habits, with 8 out of 10 Nordic consumers considering it in their purchasing decisions.

E-commerce is expected to keep growing as a result of digitalization, and the changing behavior and shopping patterns that go with it. PostNord is ready to expand in line with e-commerce. You can count on us making your online shopping easier, and more sustainable!

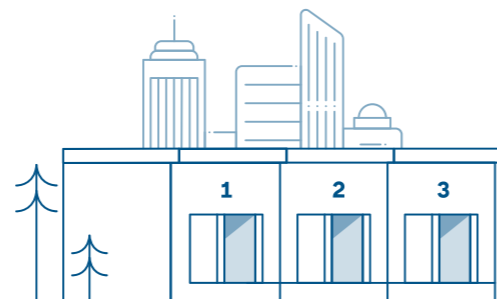


I trust you will find useful insights in this report to navigate the Nordic e-commerce market.

Annemarie Gardshol
President and Group CEO, PostNord

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Better days ahead

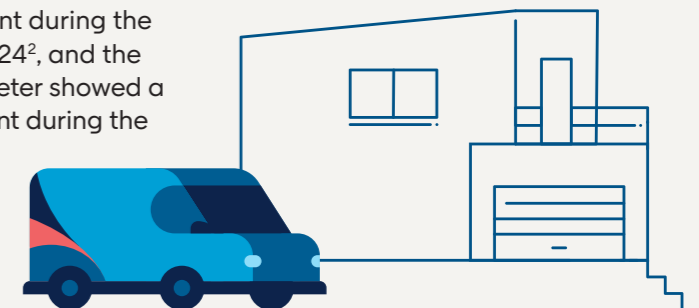
All Nordic countries faced difficulties throughout 2023. Inflation, high interest rates and low household demand highly affected the Nordic retail markets during last year. Sweden, Finland, Norway and Denmark all experienced a negative retail growth.

Consequently, all Nordic countries, except Norway, had a negative e-commerce growth in 2023. Finland and Sweden experienced an annual development rate of -2 percent, Denmark -1.9 percent, and Norway 0.0 percent. According to Eurostat and the Swedish E-barometer¹ 2023 was the second consecutive year with a negative e-commerce growth in both Sweden and Denmark.

All Nordic e-commerce markets peaked during the pandemic. Since

then, it has been challenging to maintain sales growth and volumes in most categories. The recession and the aftermath of the pandemic have created a challenging e-commerce climate, but better days are ahead. The 2024 GDP prognosis is optimistic. According to SEB and HUI Research, the recession in Norway and Sweden will most likely end during 2024. Denmark did not encounter a recession in 2023, while Finland's economy is expected to recover by 2025.

There are also optimistic signs from the global e-commerce market. German e-commerce grew by 2.6 percent during the first quarter of 2024², and the Swedish E-barometer showed a growth of 1 percent during the same period³.

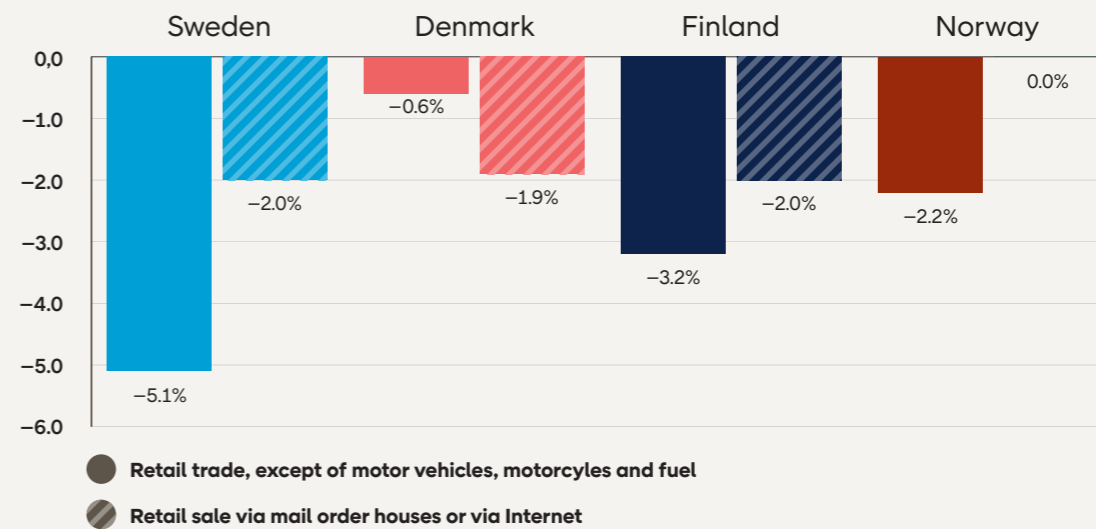


About the report

The data presented in this report is based on consumer surveys conducted in Sweden, Norway, Finland and Denmark. The surveys were carried out in March and April 2024, and had 1,000 respondents aged 18-79 in Sweden, Finland and Denmark respectively. The Norwegian survey had 974 respondents. All data in this report is based on these surveys, unless otherwise stated.

A similar report has been produced from 2010 to 2019. Due to changes in the data collection method, direct comparison between this report and the previous series of reports is not possible. However, general trends and substantial changes in consumer behavior are still interesting and are used as examples in this report.

Negative e-commerce outcome for retail trade and e-commerce in 2023

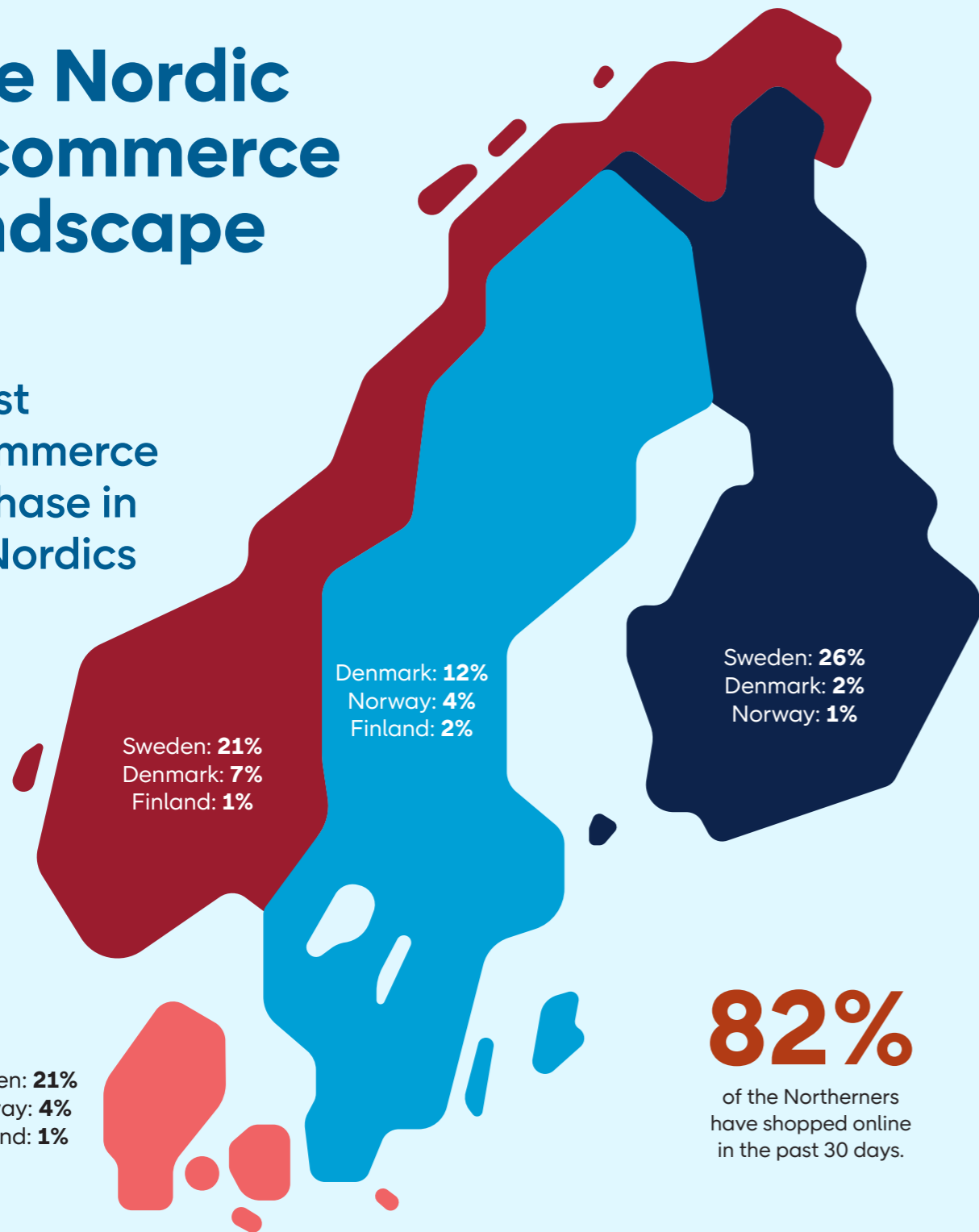


Source: Eurostat, E-barometern 2023, HUI Research

¹The Swedish E-barometer 2023 Annual Report
²CEP Research
³The Swedish E-barometer Q1 2024

The Nordic e-commerce landscape

Latest e-commerce purchase in the Nordics



82%
of the Northerners have shopped online in the past 30 days.

Nordic consumers are highly digital

Nordic consumers are highly digital and in all Nordic countries, at least 95 percent of the population has access to internet at home¹. Therefore, it is only natural that there is a high number of online shoppers in these nations. 82 percent of the Northerners have shopped online in the past 30 days and 83 percent shop at least monthly. Among the Nordic countries, Sweden is by far

the most popular country to shop from. In Sweden, Denmark is the preferred Nordic country to shop from.

The Nordic e-commerce market has grown rapidly during the past decade. Since 2015, e-commerce has had a much stronger growth than the total retail market in all countries.

Sweden

Population: 10,5 million²

- Households with access to internet at home: **95%**³
- **88%** shop online at least monthly
- **23%** received their most recent delivery on the same or the next day
- Most common delivery method: at home at the door, **29%**
- Most common payment method: invoice, **23%**

Finland

Population: 5,5 million²

- Households with access to internet at home: **97%**³
- **79%** shop online at least monthly
- **13%** received their most recent delivery on the same or the next day
- Most common delivery method: service point/pickup location, **42%**
- Most common payment method: online bank payment, **32%**

Denmark

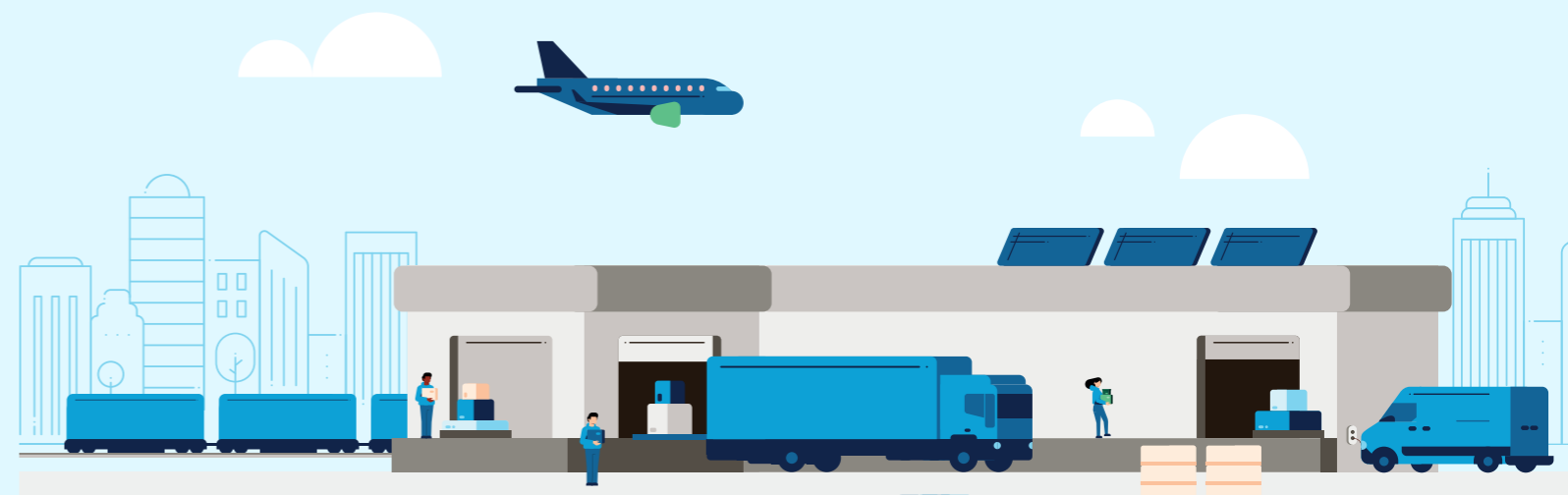
Population: 5,9 million²

- Households with access to internet at home: **96%**³
- **83%** shop online at least monthly
- **28%** received their most recent delivery on the same or the next day
- Most common delivery method: service point/pickup location, **45%**
- Most common payment method: credit card, **37%**

Norway

Population: 5,5 million²

- Households with access to internet at home: **99%**³
- **83%** shop online at least monthly
- **17%** received their most recent delivery on the same or the next day
- Most common delivery method: at home to the mailbox, **38%**
- Most common payment method: credit card, **25%**



Deliveries

- Delivery to a service point/pick-up location is the most common delivery method in the Nordics. More than **1/3** of the consumers received their latest delivery by this method.
- **20%** of the Nordic consumers received their most recent online purchase either on the same day as the purchase or the following day.

Returns

- In Sweden and Norway, **29%** of the consumers have returned an order in the last three months. In Finland, the corresponding share is **25%**, and in Denmark **33%**.
- The most common return method is to drop of the parcel at a service point/pickup location. **61%** of the Nordic consumers used this method for their most recent return.

Payments

- Credit card payment is the most common payment method among Nordic consumers. Closer to **1/4** of the consumers used a credit card for their most recent purchase online.
- However, looking at the countries individually, credit card is the most popular payment method in Denmark (**37%**) and Norway (**25%**). Most of the Swedes paid their most recent purchase online by invoice (**23%**) and Finns by online bank payment (**32%**).

¹Eurostat
²Nordic Co-operation
³Eurostat

Sweden



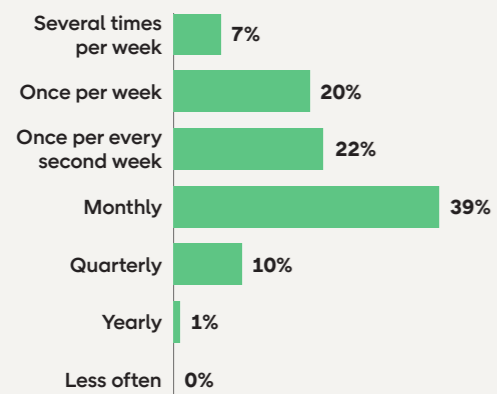
Recent online shopping

88%

of Swedish consumers have purchased physical goods online within the last 30 days.

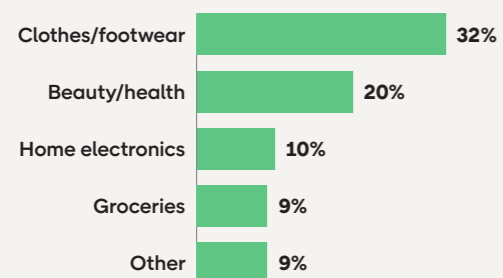
Online shopping frequency

How often do you shop online?



Most commonly bought products online

Based on your last e-commerce purchase – what kind of product did you buy?



Sweden has the highest online shopping frequency in the Nordics

Swedish online shopping behavior

Sweden has by far the highest online shopping frequency, since almost nine out of ten Swedes have been shopping online recently, and 88% do so every month. The frequency has increased in recent years. In a similar study from 2019, 70% said that they shop online every month.

Among 18-29-year-olds, 31% shop online at least once a week, compared to 23% of the 50-64-year-olds.

There are also differences between genders, since 30% of the women in Sweden shop online at least once a week compared to 22% of the men.

Clothes, footwear and cosmetics account for more than half of the e-commerce purchases. Since 2019, the interest in buying books and media online has decreased. Back then, it was the third most common product to buy online for the Swedes.

International e-commerce

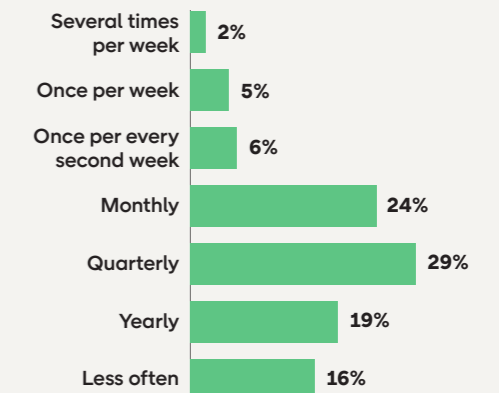
Most Swedes usually buy something from abroad quarterly, and 4 out of 10 shop online from abroad at least once a month. The international online shopping has increased since 2019, when 18% of the Swedes shopped from abroad every month. 8% of the men buy online from abroad at least once a week compared to 5% of the women.

While nearby countries like Germany, UK and Denmark are popular markets to buy from, China is the most popular. In 2019 Germany was the most popular country to buy from, while China was in third place.

Amazon, Zalando and Temu are the most popular online marketplaces for Swedish shoppers. Preferences vary with age. 46% of the 18-29-year-olds bought something from Zalando and 34% of the 50-64-year-olds bought something from Temu during the last three months.

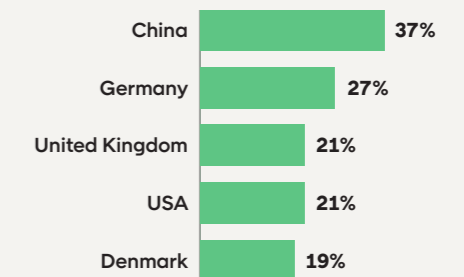
International online shopping frequency

How often do you shop online from abroad?



Most common foreign countries to buy from

From which countries have you shopped online?



Top three international marketplaces

From which of the listed marketplaces have you bought a product online during the past three months?

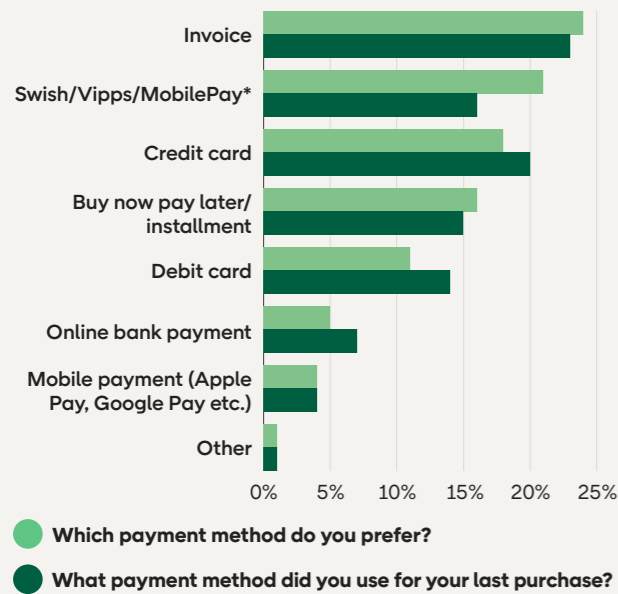
1. Amazon	32%
2. Zalando	30%
3. Temu	28%



Sweden



Used and preferred payment methods



Payments

Swedes prefer invoice payments, which is a very common option for Swedish retailers due to companies like Klarna.

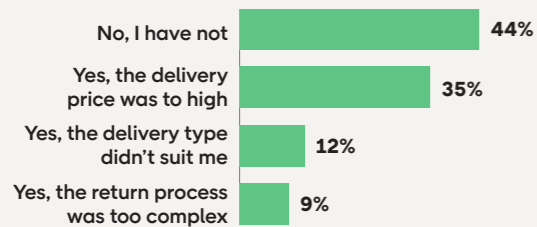
However, the share who prefer invoice has decreased since 2019 when as many as 33% preferred the method. Instead, the interest in using Swish* has increased.

56% of the Swedes have cancelled a purchase during checkout lately, with high delivery price as the most common reason. It is more common for young people to cancel orders. 72% of the 18-29-year-olds have cancelled an order compared to 50% of the 50-64-year-olds.

The willingness to pay for a sustainable delivery has increased from 34% in a similar study in 2019 to 37% today.

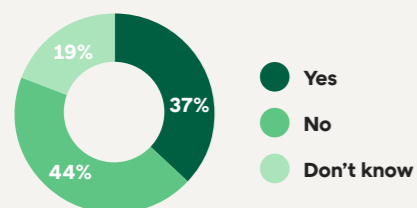
Cancellations during checkout

During the last three months, have you cancelled a purchase during checkout?



Sustainable deliveries

Would you be willing to pay an extra charge for sustainable/green delivery?



Deliveries

More orders should be delivered home to the door instead of to service points, according to the Swedish e-commerce consumers.

The share of orders that are delivered to the door has increased. Delivery through parcel lockers, the fourth most popular option, has also increased in popularity; from 2% in a similar survey 2019 to 18% today.

More than half of the deliveries had a fee. Over 60% of the 18-29-year-olds and 48% of the 50-64-year-olds paid for their latest order.

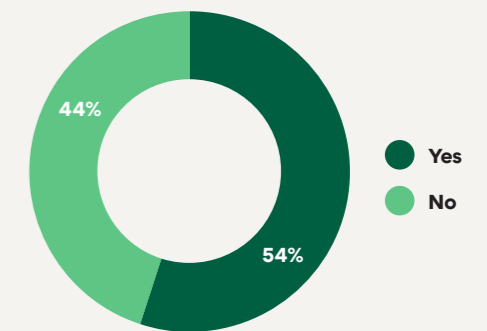
Most customers had to wait 3-5 days for their online purchase to be delivered. 9% of the 18-29-year-olds got their delivery on the same day, but only 1% of the 50-64-year-olds.

Used and preferred delivery methods



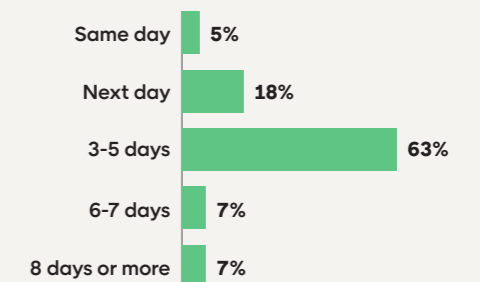
Deliveries with fees

Did you pay for your most recent delivery?



Delivery time

Based on your last e-commerce purchase: How long did it take for the parcel to be delivered?



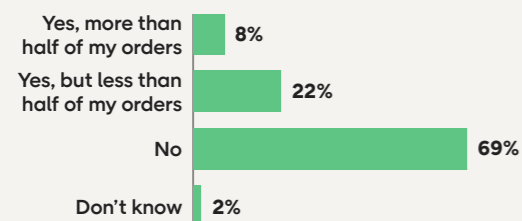
*Swish (SE), Vipps (NO) and MobilePay (FI, DK) are app-based mobile payment services

Sweden

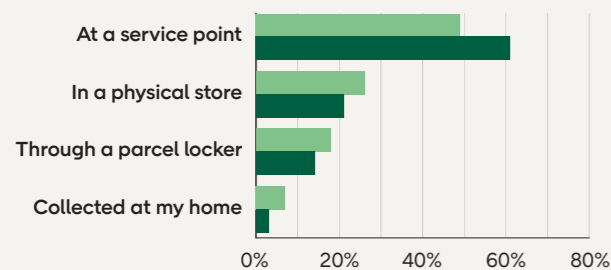


Recent returns

During the last three months, have you made any returns?



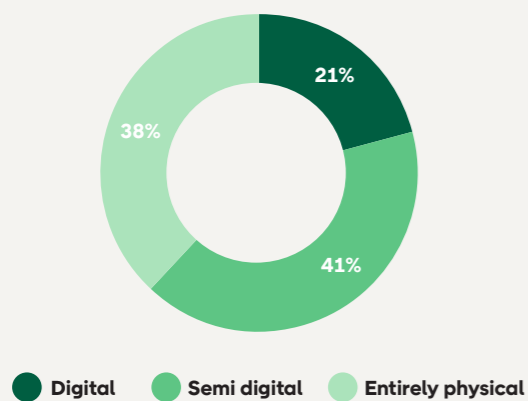
Used and preferred return methods



- What is your preferred return method?
- How did you make your most recent return?

Digitalized returns

How digitalized was your latest return?



Returns

Almost a third of the Swedes have made a return lately. Young people are more prone to return their orders. **54%** of the 18-29-year-olds have made a return recently, compared to **17%** of the 50-64-year-olds.

Most of the returns were made at a service point, which also is the preferred method. Only **3%** of the 18-29-year-olds would like their return to be picked up from their home, compared to **8%** of the 30-49-year-olds. **14%** of the Swedes made their latest return through a parcel locker, and **18%** would prefer the method.

Over **60%** of the returns were digital or semi digital. Among the 50-64-year-olds, as much as 70 percent of the returns were digital or semi digital.

Second-hand

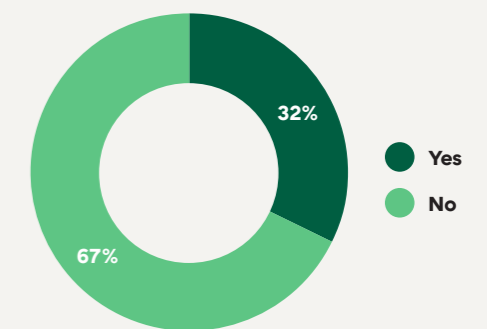
A third of the Swedes have bought something second-hand online recently. **54%** of the 18-29-year-olds have embraced the behavior compared to only **18%** of the 50-64-year-olds.

Most of the purchases consisted of clothes and footwear, while furniture and interior decor was the second most popular category to buy second-hand. Clothes and footwear accounts for over **60%** of the 18-49-year-olds latest purchase. The corresponding number is **31%** for 50-64-year-olds who buy more furniture and interior decoration instead.

The main purpose of buying a used product instead of a new one is the price difference. Sustainability and style are more important to the younger respondents than to the older.

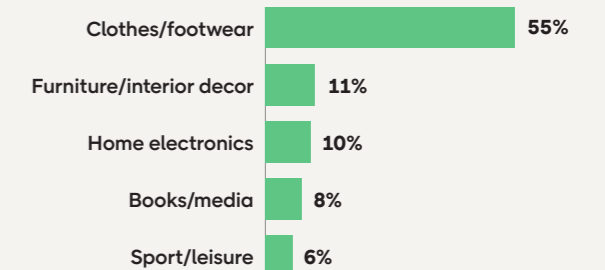
Recent second-hand online shopping

Have you bought used products (second hand, preloved, vintage) online during the last month?



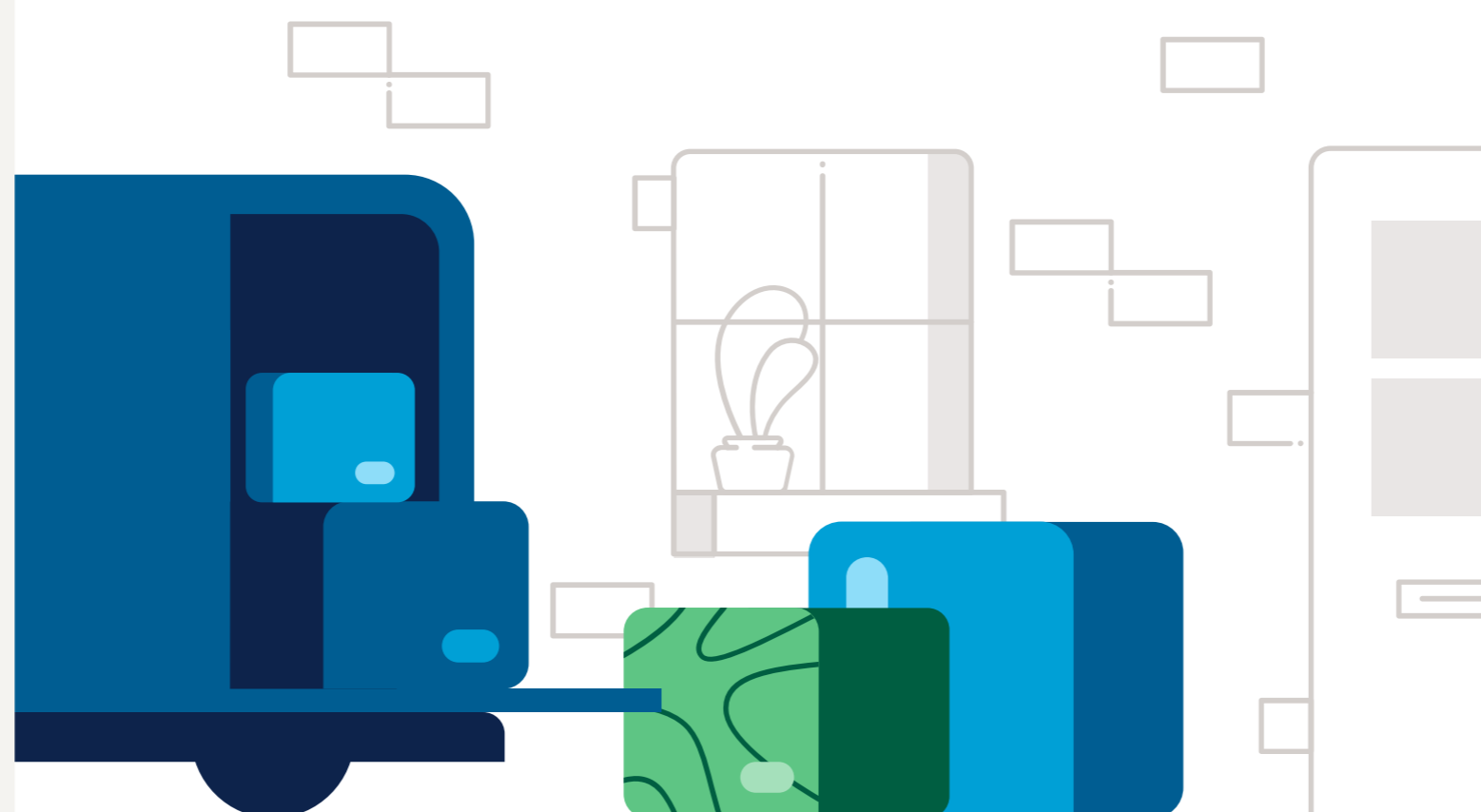
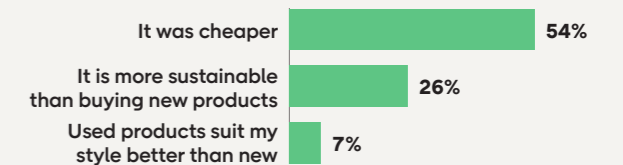
Most common second-hand products bought online

Based on your latest second hand-purchase online: what kind of product did you buy?



Reasons to buy second-hand

What is the primary reason you bought a used product instead of a new?



Denmark



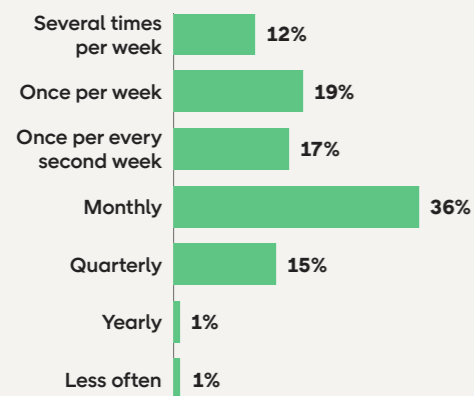
Recent online shopping

80%

of the Danish consumers have purchased physical goods online within the last 30 days

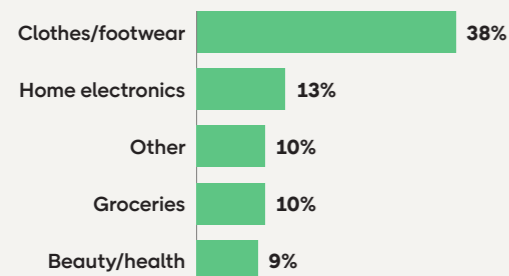
Online shopping frequency

How often do you shop online?



Most commonly bought products online

Based on your last e-commerce purchase – what kind of product did you buy?



Denmark has the most international shopping in the nordics

Danish online shopping behavior

During the recent month 80% of the Danes have made an online order. 83% shop online at least every month, compared to 62% in 2019.

Both 18-29-year-olds and 30-49-year-olds keep a high shopping frequency with 42% shopping online at least once a week. There are large differences between different age groups in Denmark; 15% of the 65-79-year-olds shop online every week, while the Danish average is 31%.

More than a third of the latest e-commerce purchases were made in the clothes and footwear category. The second most popular category is home electronics for men and beauty and health for women.

International e-commerce

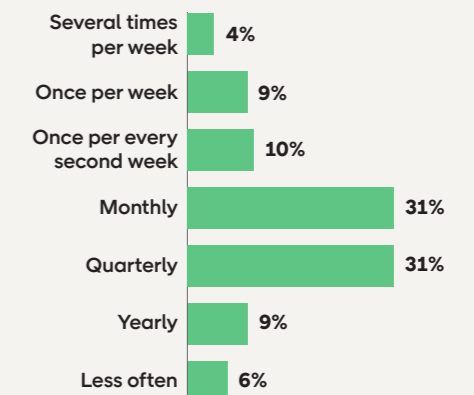
54% of the Danes shop online from abroad at least once a month, twice as many as in 2019. As many as 72% of the 18-29-year-olds shop online from abroad every month, and 21% do so every week. 17% of the men shop from abroad every week compared to 8% of the women.

About 40% shop from either Germany or Sweden. Due to Brexit, The United Kingdom has lost its position as the most popular country to shop from since 2019.

Zalando is by far the most popular online marketplace for Danish shoppers. However, 65-79-year-olds prefer to use Temu; since 19% of them bought something from the marketplace in the last three months.

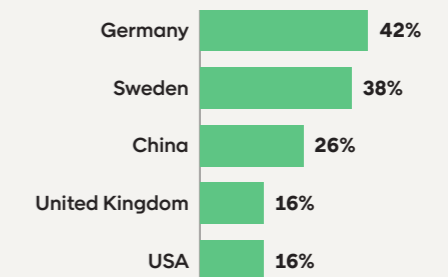
International online shopping frequency

How often do you shop online from abroad?



Most common foreign countries to buy from

From which countries have you shopped online?



Top three international marketplaces

From which of the listed marketplaces have you bought a product online during the past three months?

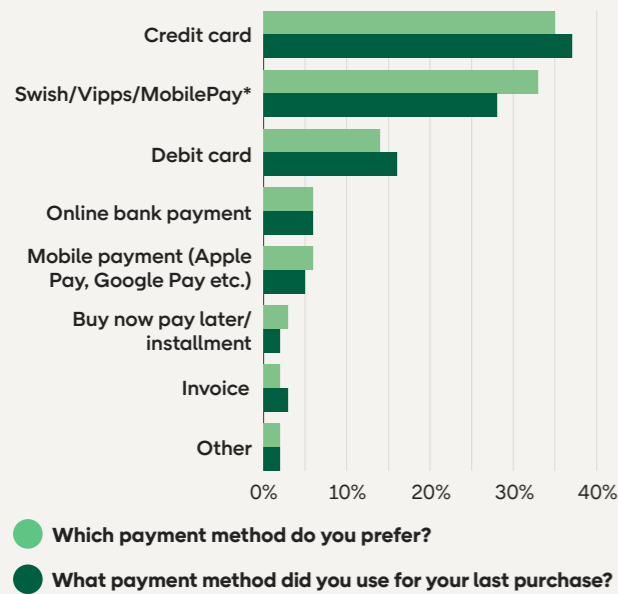
1. Zalando	35%
2. Temu	22%
3. Amazon	20%



Denmark



Used and preferred payment methods



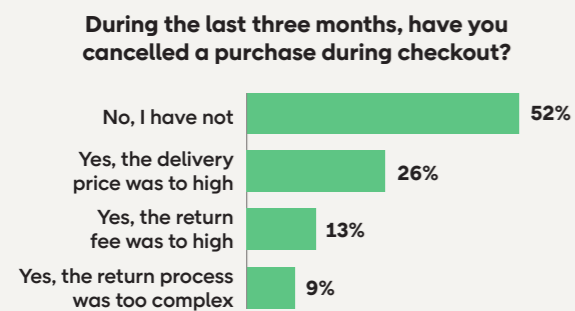
Payments

68% of the Danes prefer credit card or MobilePay* when they pay for their orders. Credit cards has maintained its position as the most popular payment method. However, it has decreased from being the favorite for **62%** of the respondents in 2019 to **35%** today. At the same time, app solutions like MobilePay are becoming increasingly popular.

52% of the Danes have not cancelled a purchase during checkout. In Denmark, 30-49-year-olds have cancelled the most orders – **66%** in the age group has done so in the last three months.

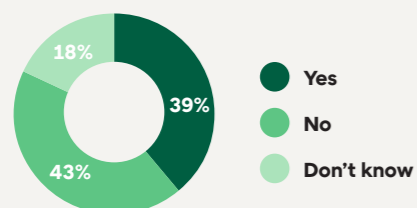
The Danes have the highest willingness to pay for sustainable delivery. The share has increased from **34%** in 2019 to **39%** today.

Cancellations during checkout



Sustainable deliveries

Would you be willing to pay an extra charge for sustainable/green delivery?



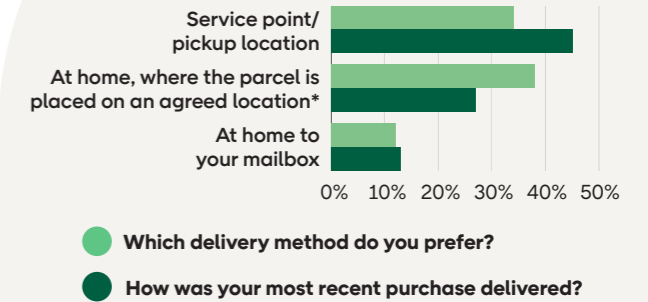
Deliveries

Service point and pickup location is the most used delivery method, but the Danish e-commerce consumers prefer delivery at home to an agreed location rather than to a service point or mailbox. Remaining deliveries are made through parcel boxes and at home delivery in person (with or without signature).

Two-thirds had to pay for their latest delivery. The largest share of paid deliveries were among 18-29- and 30-49-year-olds: about **7 of 10** in these age groups paid for their latest delivery.

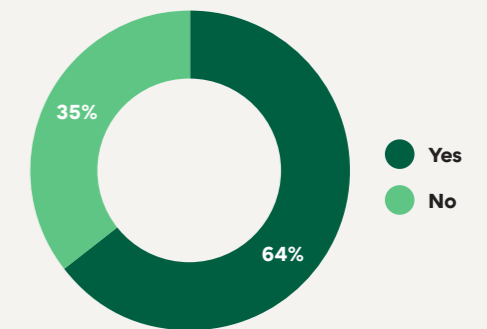
83% of the latest online purchases made by the Danes were delivered in less than 6 days. Over **30%** of the 18-49-year-olds got their orders delivered on the same day or the day after.

Used and preferred delivery methods



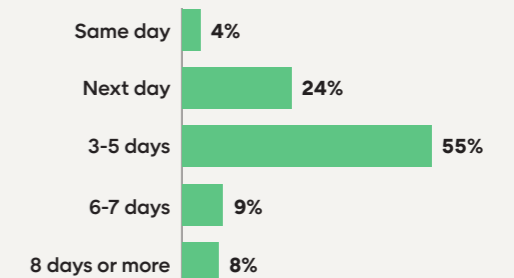
Deliveries with fees

Did you pay for your most recent delivery?



Delivery time

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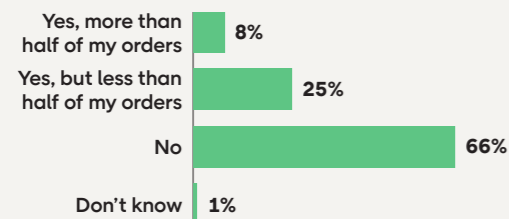
*"At home to your door" has been changed to "at home, where the parcel is placed on an agreed location" to better suit Danish delivery praxis

Denmark

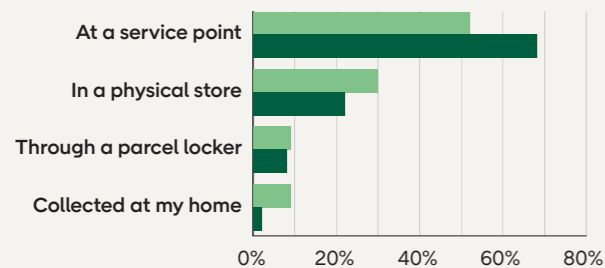


Recent returns

During the last three months, have you made any returns?



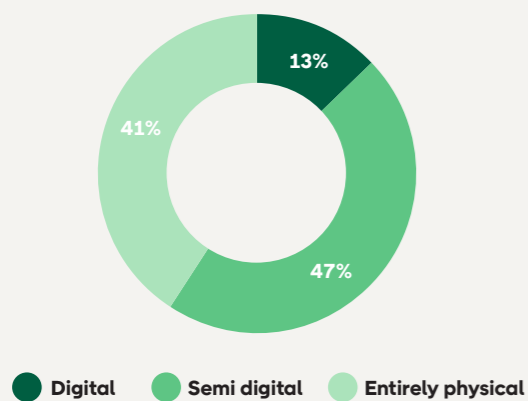
Used and preferred return methods



Light Green: What is your preferred return method?
Dark Green: How did you make your most recent return?

Digitalized returns

How digitalized was your latest return?



Returns

In Denmark, 8% has returned more than half of their recent online orders and 33% has returned an order during the last three months.

18-29- and 30-49-year-olds made the most returns. 14% in each group returned more than half of their orders during the last three months.

82% of the respondents want to make returns at a service point or in a physical store. Service point is the most popular delivery method for all age groups in the survey.

41% of the returns were entirely physical. However, most deliveries were semi digital, meaning that part of the return process contained physical papers and/or return labels.

Second-hand

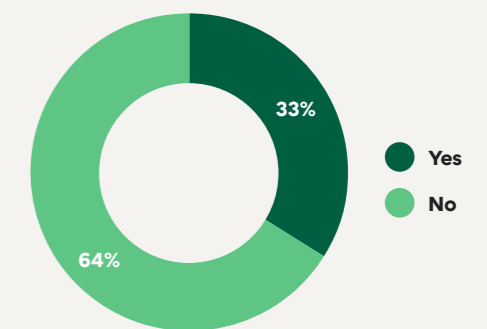
A third of the Danes have bought something second-hand online recently. However, there is a large age difference. 47% of the 18-49-year-olds have made a second-hand purchase recently, but less than 20% of the 50-79-year-olds have done so.

For both men and women, clothes and footwear is the most popular second-hand category. Thereafter, a fifth of the second-hand purchases were made in the home electronics category, which is the second most popular category for men. For women, the second most popular category is furniture and interior decoration.

Price difference and sustainability are the most important reasons to buy second-hand. 30-49-year-olds are the least price-motivated, and they think more about sustainability and style than other age groups.

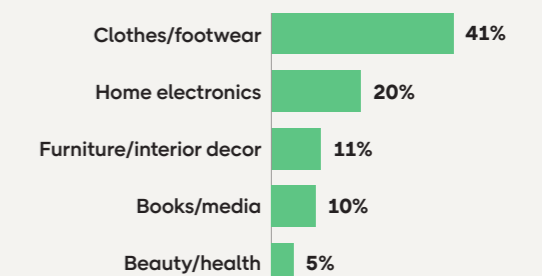
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Most common second-hand products bought online

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Finland



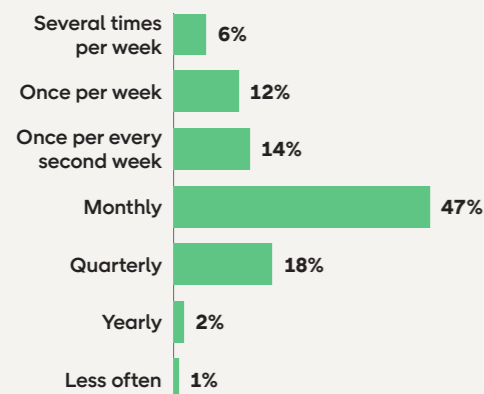
Recent online shopping

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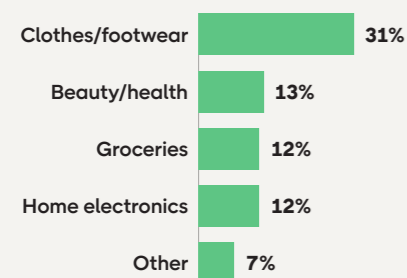
Online shopping frequency

How often do you shop online?



Most commonly bought products online

Based on your last e-commerce purchase – what kind of product did you buy?



Finland has the highest share of recent second-hand shoppers

Finnish online shopping behavior

79% of the Finnish population shop online every month. **80%** did so in the last month, compared to **50%** in 2019.

Younger people shop online a lot more often than older people. **33%** of the 18-29-year-olds buy something online every week compared to only **18%** of the 30-49-year-olds. In the oldest age group, consisting of 65-79-year-olds, only **9%** shop online weekly.

Beauty and health, groceries, and home electronics account for as much as **37%** of the online purchases. Groceries have become more popular to buy online. The category was the sixth most popular in 2019 and has advanced to third place 2024.

For women, the second most popular category is beauty and health, for men it is home electronics.

International e-commerce

39% of the Finns shop online from abroad at least once a month, a small increase from **38%** in 2019.

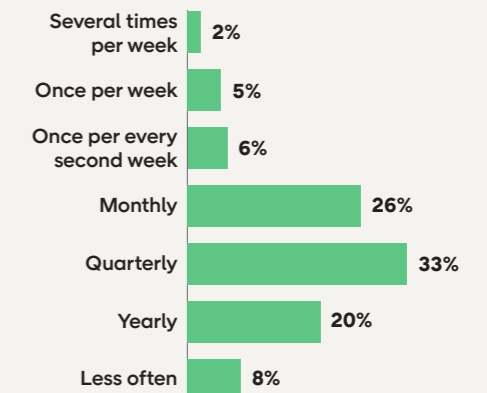
Among respondents between 18 and 29 years old, **15%** shop online from abroad every week. For the other age groups, less than **5%** do so. **8%** of the men shop online from abroad every week compared to 5% of the women.

About 40% shop from either Germany or Sweden. Sweden is now the most popular country to shop from and has advanced from the third most popular country to shop from in 2019.

Zalando is the most popular online marketplace for Finnish shoppers. It is the most popular marketplace for people in between ages 18-49, but for the older age groups Temu is the favorite.

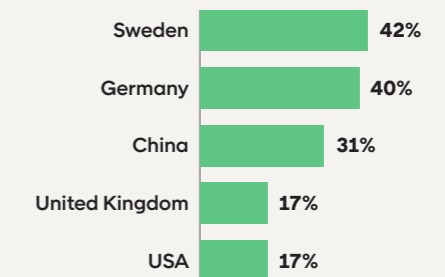
International online shopping frequency

How often do you shop online from abroad?



Most common foreign countries to buy from

From which countries have you shopped online?



Top three international marketplaces

From which of the listed marketplaces have you bought a product online during the past three months?

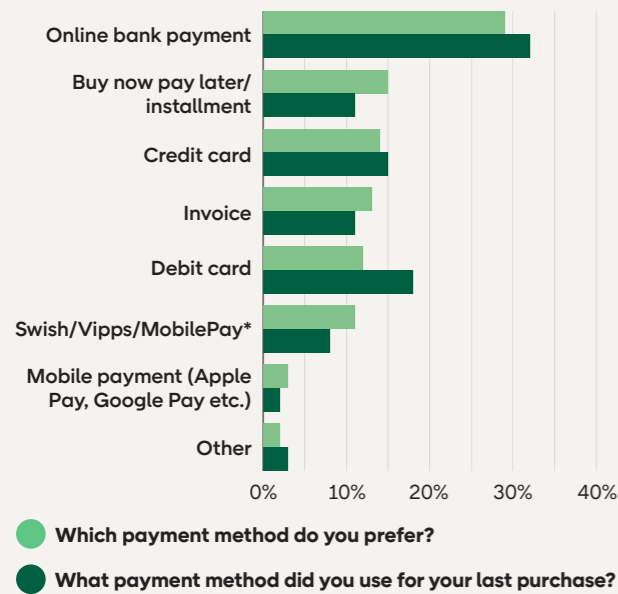
1. Zalando	31%
2. Temu	24%
3. Amazon	13%



Finland



Used and preferred payment methods



Payments

Almost a third of the Finns prefer to use online bank payments, with BNPL** options as the second most popular alternative.

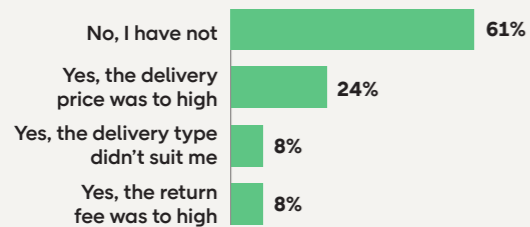
Debit card is the most popular payment method for 18-29-year-olds, and online bank payment is the most popular for all other age groups.

The Finns are most likely to complete a purchase if they have made it to checkout, compared to the other countries. However, it is almost three times as likely that a purchase is cancelled by an 18-29-year-old than by a 65-79-year-old; 60% compared to 22% has done so in the last three months.

Finns have the lowest willingness to pay for sustainable delivery in the Nordics. The willingness has decreased during the last four years; from 32% in 2019 to 22% today.

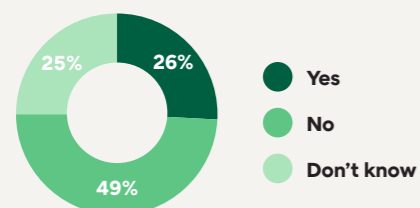
Cancellations during checkout

During the last three months, have you cancelled a purchase during checkout?



Sustainable deliveries

Would you be willing to pay an extra charge for sustainable/green delivery?



Deliveries

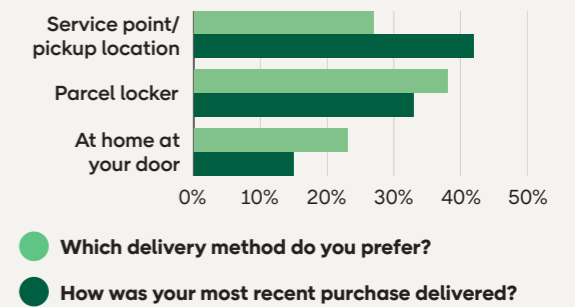
The Finns prefer to pick up their orders in a parcel locker. The method was used by 33% of the respondent compared to only 13% in 2019. However, 18-29-year-olds are indifferent between parcel lockers and home delivery to the door, but 65-79-year-olds prefer to pick up the order at a service point.

Delivery to a service point is the most frequently used method for recent deliveries, although it has decreased from 52% to 42% since 2019.

Two-thirds had to pay for their latest delivery. 6 out of 10 orders were delivered in 3-5 days.

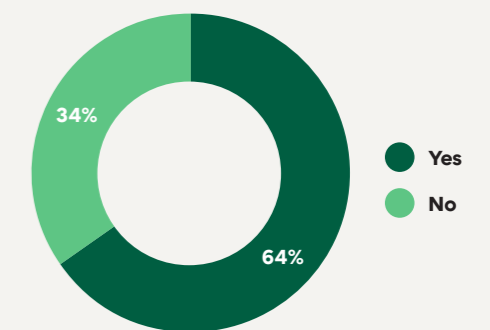
23% of the respondents aged 18-29 got their most recent order delivered within two days waiting time. In this age group 73% had to pay for their most recent delivery.

Used and preferred delivery methods



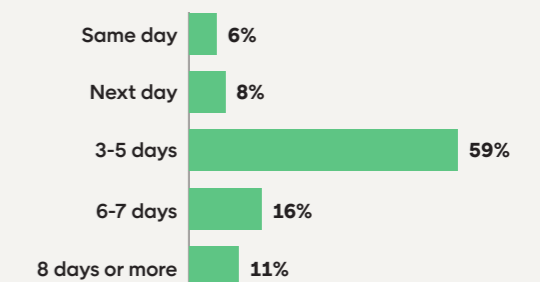
Deliveries with fees

Did you pay for your most recent delivery?



Delivery time

Based on your last e-commerce purchase: How long did it take for the parcel to be delivered?



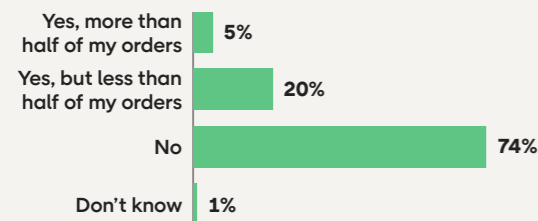
*Swish (SE), Vipps (NO) and MobilePay (FI, DK) are app-based mobile payment services **Buy now pay later

Finland

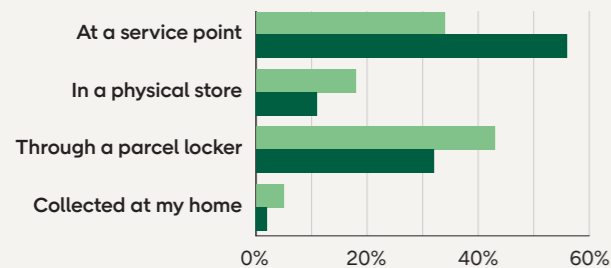


Recent returns

During the last three months, have you made any returns?



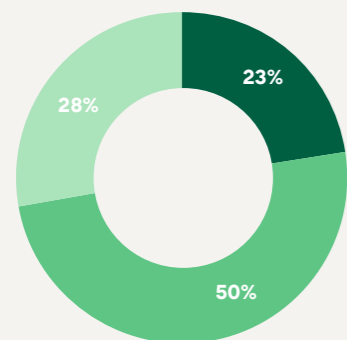
Used and preferred return methods



- What is your preferred return method?
- How did you make your most recent return?

Digitalized returns

How digitalized was your latest return?



- Digital
- Semi digital
- Entirely physical

Returns

Only **5% of** the Finns have returned more than half of their recent online orders. **41%** of the respondents aged 18-29 have returned an order in the last three months, compared to less than **30%** among older respondents.

Finns prefer to make returns through parcel lockers, followed by service points. This applies to all age groups.

50% of the returns were semi digital. 30-49-year-olds were the most digitalized – **26%** of their returns were digital.

Second-hand

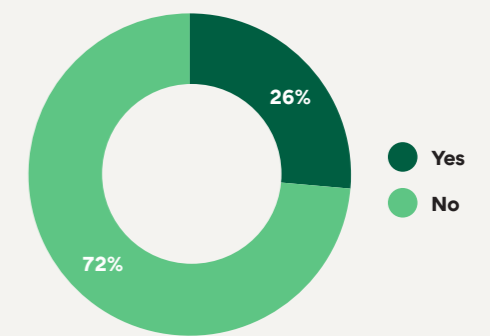
Only **a fourth** of the Finns have bought something second-hand online recently. Among respondents aged 18-29 though, **56%** have done so.

Clothes and footwear is by far the most popular second-hand category in Finland. Books and media is the second most popular category to shop second-hand. However, the 18-29-year-olds stand out from the crowd, with home electronics as the second most popular category.

Price difference and sustainability are the most important reasons to buy second-hand. Among 18-29-year-olds the third most common reason is style, while products being out of production is an important factor for the older age groups.

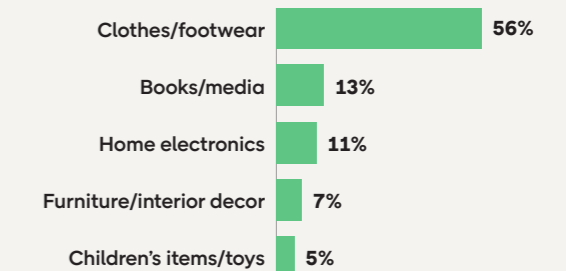
Recent second-hand online shopping

Have you bought used products (second hand, preloved, vintage) online during the last month?



Most common second-hand products bought online

Based on your latest second hand-purchase online: what kind of product did you buy?



Reasons to buy second-hand

What is the primary reason you bought a used product instead of a new?



Norway



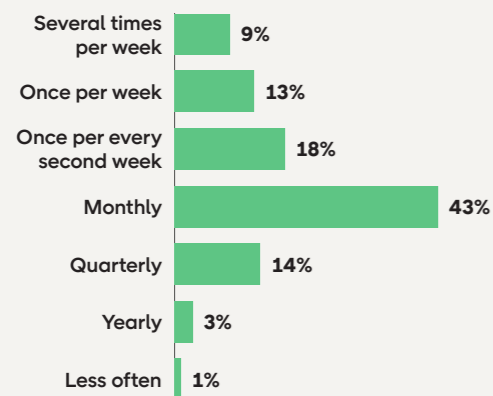
Recent online shopping

81%

of the Norwegian consumers have purchased physical goods online within the last 30 days

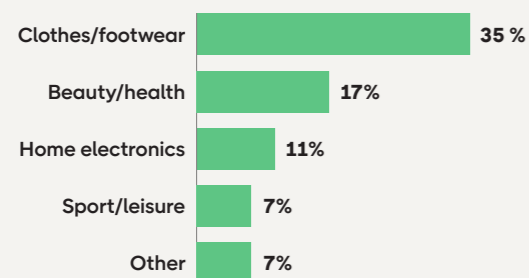
Online shopping frequency

How often do you shop online?



Most commonly bought products online

Based on your last e-commerce purchase – what kind of product did you buy?



Norway has the highest preference for home deliveries

Norwegian online shopping behavior

More than eight out of ten Norwegians have been shopping online recently, and 83% do so every month. In 2019 the recent months shopping rate was at 67%.

In Norway the 30-49-year-olds have the highest shopping frequency with 32% shopping at least once a week. There are small differences between genders: 23% of the women shop online every week compared to 21% of the men.

More than a third of the latest e-commerce purchases was in the clothes and footwear category. Since 2019 beauty and health has advanced from fourth to second place.



International e-commerce

48% of the Norwegians shop online from abroad at least once a month, an increase from 34% in 2019.

The most frequent international shoppers are the 18-29-year-olds, of whom 16% buy something from abroad at least once a week.

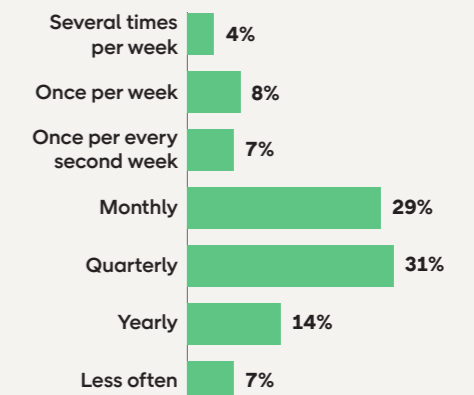
Norwegian men shop from abroad to a higher extent than Norwegian women, 15% compared to 9%.

The neighboring Nordic countries Sweden and Denmark are popular markets for more than half of the online shoppers. Buying from Sweden is much more common than it was in 2019, when the country was in fourth place.

Temu, Zalando and Ebay are the most popular online marketplaces for Norwegian shoppers. Temu is the most popular among 50-79-year-olds, but for the younger population Zalando is the first-hand choice.

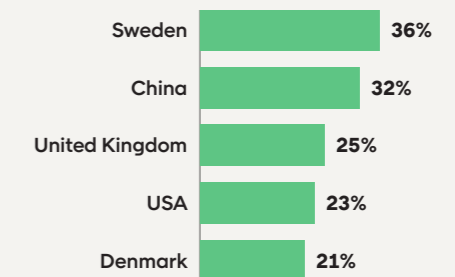
International online shopping frequency

How often do you shop online from abroad?



Most common foreign countries to buy from

From which countries have you shopped online?



Top three international marketplaces

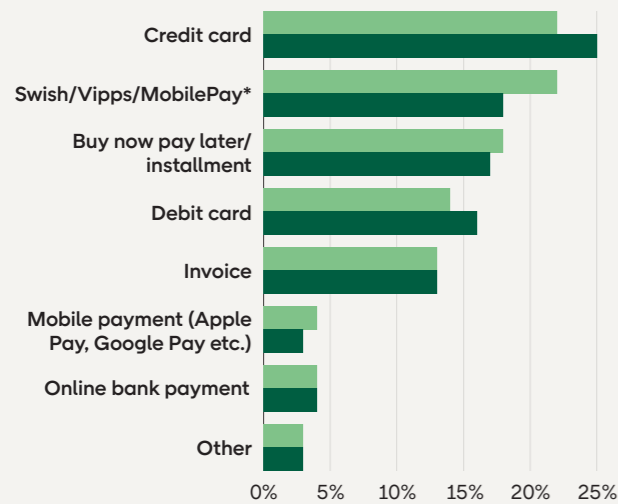
From which of the listed marketplaces have you bought a product online during the past three months?

1. Temu	36%
2. Zalando	33%
3. Ebay	15%

Norway



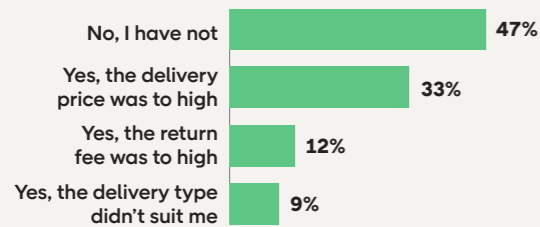
Used and preferred payment methods



- Which payment method do you prefer?
- What payment method did you use for your last purchase?

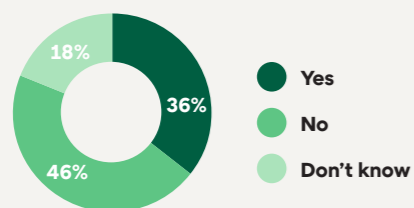
Cancellations during checkout

During the last three months, have you cancelled a purchase during checkout?



Sustainable deliveries

Would you be willing to pay an extra charge for sustainable/green delivery?



Payments

Norwegians prefer to pay either with credit card or Vipps*. A lot has changed in recent years, in 2019 only 17% preferred to pay with Vipps. Most of the interest comes from the 18-29-year-olds – 31% in this age group prefer to use Vipps.

A third of the Norwegians have cancelled an online order during checkout recently because the delivery price was too high. Only 28% of the 65-79-year-olds in Norway have cancelled an order during checkout recently compared to 68% of the 18-29-year-olds.

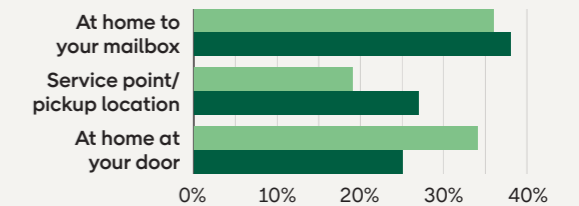
Deliveries

Norwegians prefer at home deliveries, either to the door or the mailbox. The relatively low interest in picking up orders from a service point can be reflected in the decrease in use of this kind of delivery. Parcel lockers are the fourth most popular delivery option; 9% have it as their favorite delivery option, and 7% had their latest purchase delivered through a parcel locker. Younger Norwegians tend to prefer parcel lockers more than older.

Two-thirds had to pay for their latest delivery. 65-79-year-olds had the highest share of paid deliveries and 18-29-year-olds the second highest.

30-49-year-olds got the fastest deliveries based on recent orders.

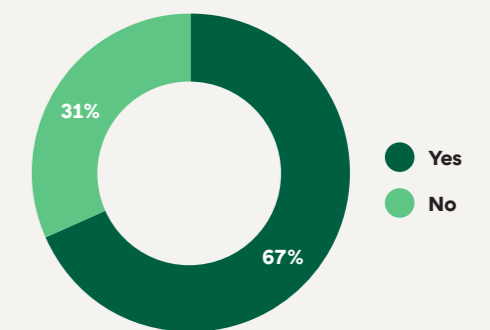
Used and preferred delivery methods



- Which delivery method do you prefer?
- How was your most recent purchase delivered?

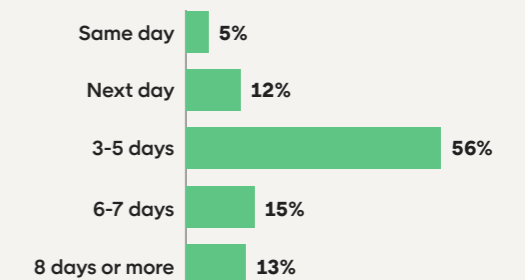
Deliveries with fees

Did you pay for your most recent delivery?



Delivery time

Based on your last e-commerce purchase: How long did it take for the parcel to be delivered?



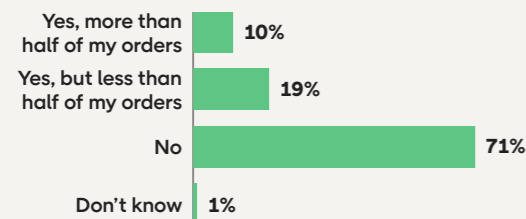
*Swish (SE), Vipps (NO) and MobilePay (FI, DK) are app-based mobile payment services

Norway

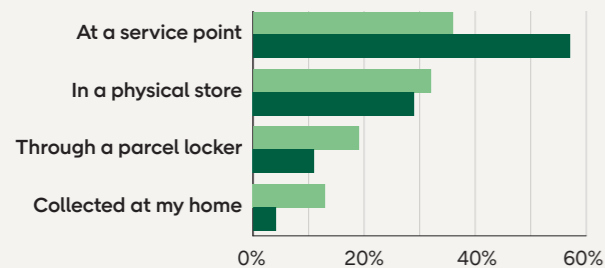


Recent returns

During the last three months, have you made any returns?



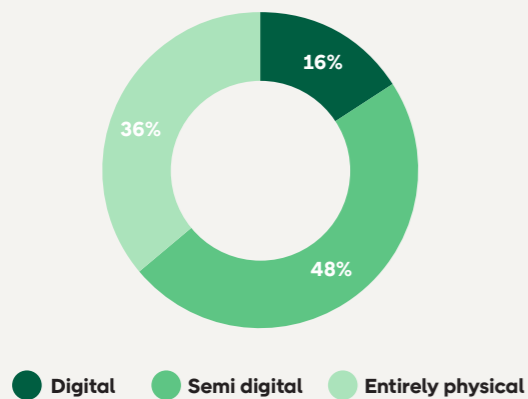
Used and preferred return methods



- What is your preferred return method?
- How did you make your most recent return?

Digitalized returns

How digitalized was your latest return?



Returns

In Norway, 10% has returned more than half of their recent online orders.

The youngest consumers make the most returns. Almost half of the 18-29-year-olds have returned an order in the last three months, and 15% returned more than half of their purchases.

57% of the respondents returned their latest order at a service point, but only 36% prefer the method. Many Norwegians wish to return their packages via parcel lockers or home pickup.

Over 60% of the returns were digital or semi digital. 18-29-year-olds made the most digital returns, and 50-64-year-olds made the most semi digital returns.

Second-hand

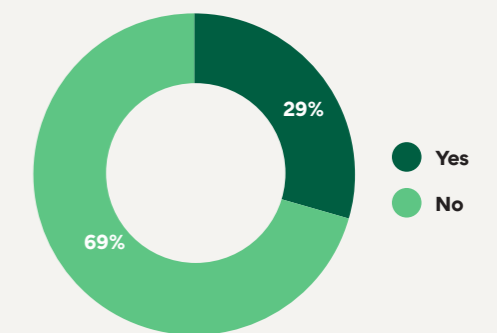
Less than a third of the Norwegians have bought second-hand online recently. However, half of the 18-29-year-olds have done so.

Most of the purchases consisted of clothes and footwear. Among the 50-64-year-olds, home electronics, books and media were almost as popular as clothes and footwear.

Price difference and sustainability are the most important reasons to buy second-hand. 30-49-year-olds has the highest share of people whose primary reason is sustainability: 29%

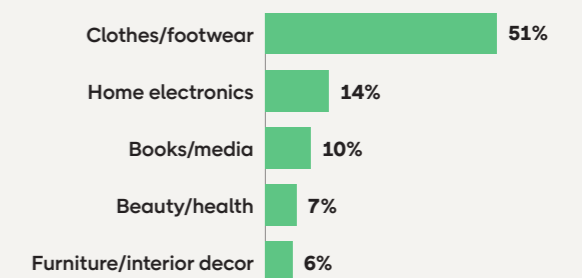
Recent second-hand online shopping

Have you bought used products (second hand, preloved, vintage) online during the last month?



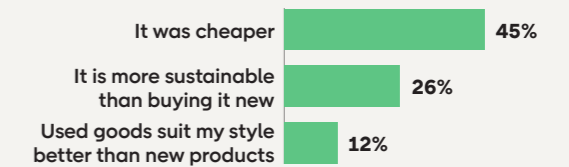
Most common second-hand products bought online

Based on your latest second hand-purchase online: what kind of product did you buy?



Reasons to buy second-hand

What is the primary reason you bought a used product instead of a new?



China and Germany are the most popular countries for cross-border e-commerce when looking beyond the Nordics



USA

Share of consumers who made their latest e-commerce purchase from abroad from the US

- 1. Norway 9%
- 2. Sweden 7%
- 3. Finland 4%
- 4. Denmark 3%

Top list of products bought by Nordic consumers

- 1. Clothes/footwear 34%
- 2. Books/media 15%
- 3. Beauty/health 12%
- 4. Home electronics 10%

United Kingdom

Share of consumers who made their latest e-commerce purchase from abroad from the UK

- 1. Sweden 9%
- 2. Norway 9%
- 3. Denmark 6%
- 4. Finland 4%

Top list of products bought by Nordic consumers

- 1. Clothes/footwear 38%
- 2. Books/media 15%
- 3. Sport/leisure 12%
- 4. Beauty/health and home electronics 9%

Global e-commerce (excluding the Nordics)

Based on the Nordic consumers' latest e-commerce purchase from abroad, excluding the Nordics

Germany

Share of consumers who made their latest e-commerce purchase from abroad from Germany

- 1. Denmark 23%
- 2. Finland 21%
- 3. Sweden 14%
- 4. Norway 7%

Top list of products bought by Nordic consumers

- 1. Clothes/footwear 34%
- 2. Other 14%
- 3. Home electronics 13%
- 4. Vehicle/vehicle-related products 10%

China

Share of consumers who made their latest e-commerce purchase from abroad from China

- 1. Sweden 27%
- 2. Norway 25%
- 3. Denmark 19%
- 4. Finland 19%

Top list of products bought by Nordic consumers

- 1. Clothes/footwear 37%
- 2. Home electronics 16%
- 3. Other 13%
- 4. Sport/leisure and furniture/interior decor 7%

The Nordic consumers shop from all over the world

Based on the Nordic consumer behaviors for e-commerce purchases abroad it is clear that the high degree of digitalization has contributed to making the Northerners comfortable shopping online. 83 percent of the consumers have made an e-commerce purchase from abroad and of those, 44 percent do so regularly, at least monthly.

Nordic consumers shop online from a variety of countries, and the most popular country to shop from is China. 22 percent of the Nordic consumers made their most recent purchase online from abroad from China. In general, the consumers mainly shop from Europe; when excluding the Nordics, 41 percent of the consumers made their most recent purchase from abroad from another European country.

Flexible deliveries – are key for Nordic consumers in general

When it comes to how important certain factors are when Nordic consumers decide what website to shop from, there are many similarities. However, if one looks closer there are also differences, making each country unique. When ranking and comparing each aspect between the countries, interesting patterns appear.

Swedish consumers are the most complex. In Sweden, consumers prioritize flexible deliveries the most, ranking the possibility to choose where and how their parcels are delivered the highest. However, Swedes in general seem to rate each factor higher than the other Nordic consumers when asked about how important they are when shopping online. Furthermore, when analyzing each factor individually the Swedes are quite scattered, making it difficult to bundle them and pinpoint the Swedish e-commerce consumer preferences in general.

Danish consumers can in many aspects be seen as the “typical Nordic consumer”. When comparing how much the Danish answers deviate from the Nordic average, they have the smallest deviation when excluding each country’s most extreme value. Danes stand out only regarding one

of these factors, and that is how important familiarity with the brand is for them when deciding what website to shop from. Danish consumers care at least 20 percent less than the other Northerners about this factor.

Finnish consumers prioritize flexible deliveries to an even greater extent than Swedes and Danes. Among all Nordic consumers, the Finnish deem flexible deliveries the most important factor when deciding where to shop from. Despite flexible deliveries being the most important to the Finnish consumers, quick deliveries are not as important. Consumers in

Finland rank quick deliveries considerably lower than any other country in the Nordics; 10 percentage points lower than the Nordic average.

Norwegian consumers differ from the rest of the consumers in the Nordic countries as they do not prioritize flexible deliveries the most. Instead, Norwegians consider “lowest possible price” and “free deliveries” the most – in other words, to keep the price for the whole purchase as low as possible. However, the Norwegian consumers still consider flexible deliveries important, as these factors are the highest priority after price.



Consumers who consider the following factors important or very important when deciding what website to shop from



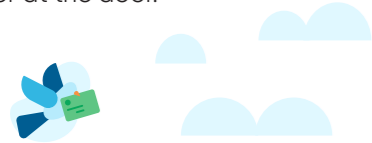
	Nordic average	Sweden	Denmark	Finland	Norway
Lowest possible price	69%	70%	68%	66%	72%
Quickest possible delivery	39%	46%	41%	30%	41%
Smoothest possible checkout (pre-filled information etc)	45%	45%	47%	42%	46%
Free delivery	73%	73%	70%	71%	76%
Familiar with the brand	58%	66%	40%	60%	64%
Clearly stated return policies	68%	67%	68%	68%	68%
That I can choose where to collect my parcel	75%	75%	76%	80%	69%
That I can choose the way my parcel is delivered	74%	75%	74%	79%	69%
The web shop can offer sustainable deliveries	41%	48%	37%	41%	39%



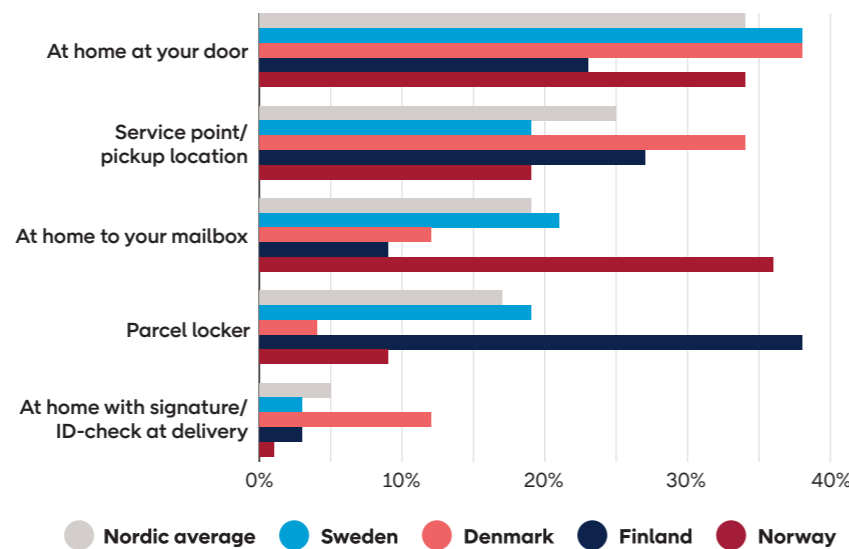
Nordic shoppers' payment and delivery choices vary

Deliveries – an important factor for consumers and thereby online retailers Norwegians stand out as they to a far greater extent than other Northerners prefer at home delivery to the mailbox. Many of the other Nordic consumers also prefer home delivery but want the parcel left at the door or at an agreed location.

Sweden is the country where the preferences are most equally distributed among the different delivery methods. In contrast, Norwegians know where they want their parcels delivered – at home to the mailbox or at the door.

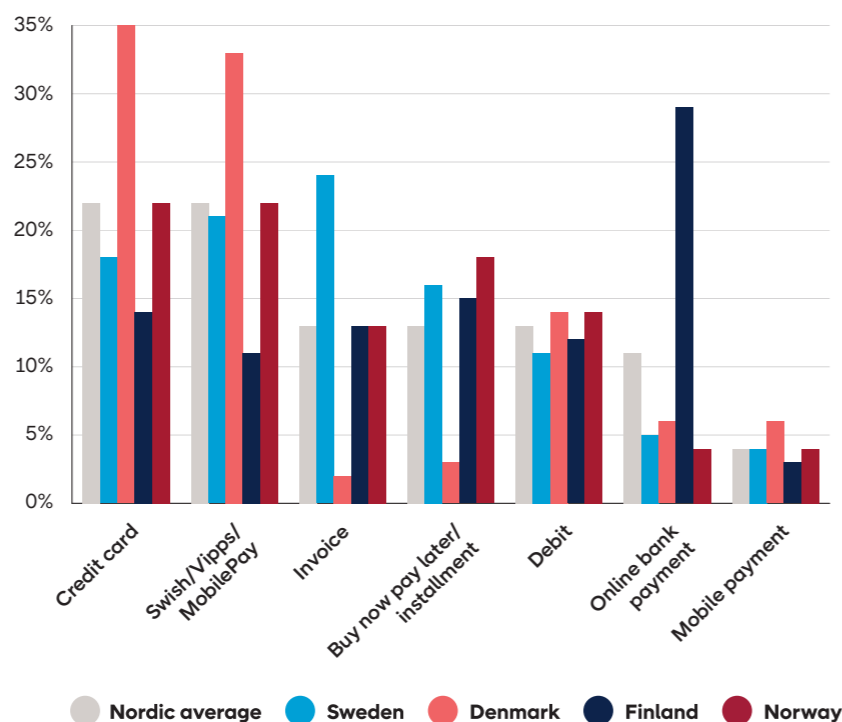


The preferred delivery methods of Nordic consumers



Danish and Finnish consumers have a clearly preferred payment method – in contrast, Swedes and Norwegians are more indeterminate. In Sweden and Norway, the distribution of preferred payment methods is relatively balanced. The difference between the fourth and top choices is only 8 percentage points in both countries. Hence, e-commerce retailers operating in Sweden and Norway are facing more complex requirements regarding payments.

The preferred payment methods of Nordic consumers



Sustainability matters to Nordic online consumers

Many of the Nordic countries are often seen as rather sustainable and on a list of the top ten most sustainable destinations in the world, 8 of the top 10 destinations are in the Nordics¹. This is also the case when it comes to the Nordic consumers. 8 out of 10 Nordic consumers consider sustainability factors when shopping online.

However, Finnish e-commerce consumers stand out as there are more consumers declaring that sustainability factors do not affect their online shopping. 28 percent of the consumers in Finland stated this, compared to a Nordic average of 21 percent.

Swedish and Danish consumers consider sustainable materials as the most important sustainability factor when shopping online. Furthermore, consumers in Norway see fair working conditions as the primary sustainability factor when shopping online.

8/10
Nordic consumers consider sustainability factors when shopping online

Top 3 most important factors regarding sustainable e-commerce for:

Swedes

- 1 Sustainable materials **37%**
- 2 Home delivery with less environmental impact **29%**
- 3 Fair working conditions **25%**

Danes

- 1 Sustainable materials **30%**
- 2 Home delivery with less environmental impact **24%**
- 3 Sustainable and efficient packaging **24%**

Finns

- 1 Sustainable materials **25%**
- 2 Fair working conditions **24%**
- 3 Sustainable and efficient packaging **23%**

Norwegians

- 1 Fair working conditions **34%**
- 2 Sustainable materials **29%**
- 3 Home delivery with less environmental impact **27%**

¹ Global Destination Sustainability Movement

PostNord – a partner for e-commerce

PostNord exists to make everyday life easier. For consumers, this means flexibility, no matter where you are. For e-tailers and other senders from all over the world, we offer a simple and smooth route to the Nordic region and its 24 million consumers.

We prioritize sustainability in our offerings and operations, aiming for fossil-free transportation and operations by 2030. PostNord was the first to achieve the Nordic Swan Ecolabel certification for e-commerce logistics, reflecting our dedication to sustainability.

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