Introduction

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Study background and methodology

Background:

The 'Smart Shopper 2024 study' provides recent insights on consumer shopping and research behavior across 7 product categories. This comprehensive global research builds upon its successful predecessor from 2019, providing valuable insights into the ever-changing consumer landscape. This is the 6th edition of the study.

Target population and category definition:

Nationally representative online population 18+Y.O. who made a purchase in the included product categories. In order to provide accurate insights, each respondent has only assessed his/ her latest purchase in the selected category.

Look-back window for purchases:

The look-back windows in 2024 are largely in line with the first measurement in 2019: Past 3 months for **Consumer Electronics, Home & Garden, Fashion, Toys,** and **Jewellery.** Past 1 month for **Food & Groceries** and **Beauty.** The look-back windows in 2022, 2023, and 2024 are the same.

Sample size and sampling approach:

N = 2101, equally distributed per product category. Online representative quotas on age, gender, region have been applied. Each respondent was selected based on individual shopping behaviour in the relevant product categories and completed the entire survey for only one product category.

Method and survey administration:

20-minute mobile-friendly online-survey in a local language. Survey was programmed via Qualtrics software and fielded in CINT panels. Reporting via Google's internal Scratch team.

Fieldwork timings:

2019: August - September
2021: May - June
2022: May - July
2023: May
2024: February

Weighting:

Weighting according to **Gallup 2021 Online Population Data.**
2-step weighting process:
1) Product-level weighting to ensure proper product sample representation.
2) Total level weighting to account for actual product purchase shares.

Markets run in 2024:

UKI: UK
DACH: Austria, Germany, Switzerland
FRITES: France, Italy, Portugal, Spain
NORTHERN EUROPE: Belgium, Denmark, Finland, Netherlands, Norway, Sweden
CEE: Croatia, Czech Republic, Greece, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia
**EEM:** Saudi Arabia, South Africa, Turkey
AMER: US

Category description

Core Category	Sub Category	More detailed category description
CE (Consumer Electronics)	Home electronics Mobile devices Laptops, Computers	TV and home cinema / gaming / audio and hi-fi Tablets, smartphones, home assistants, cameras Computer (desktop, laptop)
Home & Garden	Large home appliances Small appliances Garden furniture Furniture	White goods, e. g. washing machine, dishwasher, refrigerator, stove / oven cleaning / kitchen / personal care Living room / bedroom / kitchen
Fashion	Clothing / Outerwear Fitness / Athletic Clothing Footwear	Women, men, children, coats and jackets / dresses and skirts / pants / business clothes Clothes for e. g. football, cycling, swimming, fitness, outdoor, hiking Women, men, children / formal, casual, comfort, sport shoes
Food & Groceries	Food Household items	Fresh (fruit, vegetables, dairy), canned and dry food, sweets and chocolate, non-alcoholic drinks, alcoholic drinks Cleaning supplies, detergent, toilet paper
Beauty	Personal care Cosmetics	Women, men / body care, skin care, hair care, hygiene
Toys	Indoors Outdoors	Games, board games, soft toys, baby & toddler, dolls, sports & outdoor toys
Jewellery	Jewellery	Bracelet, charm, ring, necklace, precious metals / stones

Content overview

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Product Purchase

Chapter 2
Product Discovery & Research

Chapter 3
Mobile shopping
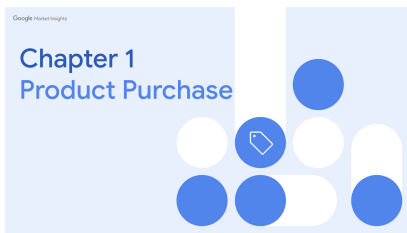
Source: Smart Shopper Research. Google, Cint (2023+2024) / Savanta (2022) / Kantar (2020+2019), Online survey, Country: Norway, Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries and Beauty.

2024 Key stats for Norway across all verticals

49% vs. 51%
Online vs. offline purchase split

65%
Do online research

63%
Channel agnostic buyers who are not fully set on one channel

54%
Used a search engine prior to their last purchase

31%
Research online and purchase offline

96%
Used Google as a search engine for product research

49%
Experienced online pain points during their shopping journey

35%
Used new tools/technologies when looking for inspiration about what to buy in the last 6 months

38% vs. 40% *(not adding up to 100%)*
Retailer vs. brand - what comes first?

24%
Used five or more channels to shop

Google Market Insights   NO

Chapter 1
Product Purchase

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Last purchase: online vs. offline

Consumer Electronics

Year	Online	Offline	Change
2024	72%	28%	+2
2023	70%	30%	+11
2022	59%	41%	+15
2021	44%	56%	−1
2019	45%	55%	

Food & Groceries

Year	Online	Offline	Change
2024	29%	71%	+5
2023	24%	76%	+1
2022	23%	77%	

Jewellery

Year	Online	Offline	Change
2024	66%	34%	−4
2023	70%	30%	+13
2022	57%	43%	

Home & Garden

Year	Online	Offline	Change
2024	65%	35%	+6
2023	59%	41%	+15
2022	44%	56%	+5
2021	39%	61%	+11
2019	28%	72%	

Beauty

Year	Online	Offline	Change
2024	50%	50%	+1
2023	49%	51%	+18
2022	31%	69%	+/-0
2021	31%	69%	+8
2019	23%	77%	

AVERAGE OF ALL VERTICALS

Year	Online	Offline	Change
2024	49%	51%	+2
2023	47%	53%	

Fashion

Year	Online	Offline	Change
2024	55%	45%	−3
2023	58%	42%	+6
2022	52%	48%	+13
2021	39%	61%	+14
2019	25%	75%	

Toys

Year	Online	Offline	Change
2024	44%	56%	−14
2023	58%	42%	+22
2022	36%	64%	−5
2021	41%	59%	+24
2019	17%	83%	

● Online   ● Offline

Google Market Insights   NO

Last purchase: online vs. offline

AVERAGE OF ALL VERTICALS

	Online	Offline
18-24 Y.O.	60%	40%
25-34 Y.O.	57%	43%
35-44 Y.O.	59%	41%
45-54 Y.O.	50%	50%
55+ Y.O.	37%	63%

2024 ● Online ● Offline

Google Market Insights   NO

ROPO matrix: 2023 & 2024

2023, Average across all verticals

	Online research only	Online and offline research	Offline research only
Online purchase	18%	34%	4%
Offline purchase	16%	17%	11%

2024, Average across all verticals

	Online research only	Online and offline research	Offline research only
Online purchase	19%	32%	3%
Offline purchase	12%	19%	14%

● Online   ● Offline

Note: Excluding respondents who did no product research before their purchase

Google Market Insights   NO

Purchase channel preferences & omni-channel importance

Consumer Electronics

Year	Online	Offline	Agnostic
2024	21%	7%	72%
2023	17%	5%	78%
2022	18%	13%	69%
2021	26%	15%	59%
2019	23%	13%	64%

Food & Groceries

Year	Online	Offline	Agnostic
2024	3%	54%	44%
2023	3%	61%	36%
2022	7%	59%	35%

Jewellery

Year	Online	Offline	Agnostic
2024	11%	12%	77%
2023	15%	10%	75%
2022	14%	17%	69%

Home & Garden

Year	Online	Offline	Agnostic
2024	7%	14%	78%
2023	10%	12%	77%
2022	11%	30%	59%
2021	11%	30%	59%
2019	7%	31%	62%

Beauty

Year	Online	Offline	Agnostic
2024	13%	20%	67%
2023	13%	25%	62%
2022	10%	32%	58%
2021	17%	28%	54%
2019	10%	44%	46%

AVERAGE OF ALL VERTICALS

Year	Online	Offline	Agnostic
2024	10%	26%	63%
2023	10%	31%	59%

Fashion

Year	Online	Offline	Agnostic
2024	16%	16%	68%
2023	16%	20%	64%
2022	11%	18%	71%
2021	21%	21%	58%
2019	9%	33%	57%

Toys

Year	Online	Offline	Agnostic
2024	9%	14%	77%
2023	12%	9%	79%
2022	8%	14%	77%
2021	18%	9%	73%
2019	7%	28%	65%

● Online　● Offline　● Agnostic

Note: showing aggregated results

Online Preference - respondents who said that they always or almost always buy online in this category.

Offline Preference - respondents who said that they never buy online in this category - always in stores.

Channel agnostic - shoppers who buy offline as well as online and aren't fully set on one channel

Google Market Insights　NO

Change of buying behaviour since 2020 covid pandemic

Consumer Electronics

Year	Online	Offline	Change
2024	74%	26%	+6
2023	68%	32%	+1
2022	67%	33%	+/-0
2021	67%	33%	

Food & Groceries

Year	Online	Offline	Change
2024	37%	63%	-6
2023	43%	57%	-10
2022	53%	47%	

Jewellery

Year	Online	Offline	Change
2024	71%	29%	+3
2023	68%	32%	-2
2022	70%	30%	

Home & Garden

Year	Online	Offline	Change
2024	72%	28%	+8
2023	64%	36%	-5
2022	69%	31%	-4
2021	73%	27%	

Beauty

Year	Online	Offline	Change
2024	69%	31%	+13
2023	56%	44%	+/-0
2022	56%	44%	-21
2021	77%	23%	

AVERAGE OF ALL VERTICALS

Year	Online	Offline	Change
2024	64%	36%	+2
2023	62%	38%	

Fashion

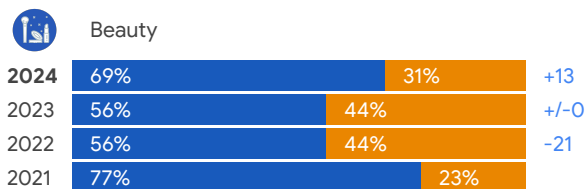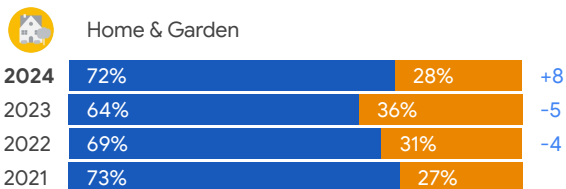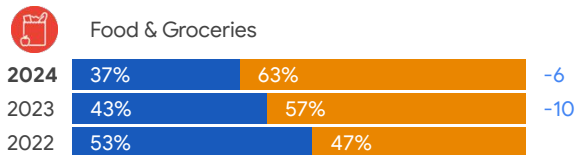| Year	Online	Offline	Change
2024	66%	34%	+/-0
2023	66%	34%	+2
2022	64%	36%	-4
2021	68%	32%	

Toys

Year	Online	Offline	Change
2024	69%	31%	-8
2023	77%	23%	+17
2022	60%	40%	-8
2021	68%	32%	

● Significantly/tend to buy more **online**

● Significantly/tend to buy more **offline**

Note: Results exclude respondents whose behaviour remained the same.

Google Market Insights   NO

Top 10 purchase triggers

2024

Trigger	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Regular refill	26% 37% 63%				24% 36% 60%	31% 38% 69%		
Needed to replace an item	20% 25% 45%	21% 47% 68%	17% 47% 64%	27% 32% 59%	14% 10% 24%	24% 27% 52%	12% 9% 21%	23% 15% 38%
Needed something for the current season	23% 22% 44%		17% 14% 31%	23% 32% 55%		25% 16% 42%		25% 16% 41%
Promotion	21% 17% 38%	27% 19% 46%	21% 23% 45%	23% 20% 43%	18% 14% 32%	19% 13% 32%	18% 19% 38%	29% 16% 45%
Came across it spontaneously	21% 15% 36%	22% 12% 34%	20% 13% 34%	26% 16% 42%	18% 11% 29%	21% 11% 32%	22% 27% 49%	23% 26% 49%
Wanted something up-to-date or new	21% 14% 35%	34% 26% 60%	27% 23% 49%	30% 17% 47%	7% 6% 13%	18% 10% 27%	19% 13% 33%	34% 23% 56%
Needed something for a special occasion	18% 17% 35%			15% 13% 27%				26% 30% 56%
Wanted a personal reward	19% 13% 32%	30% 16% 46%	20% 15% 34%	19% 14% 33%	14% 9% 23%	21% 12% 34%	13% 11% 23%	28% 23% 51%
I was curious and wanted to test the product	18% 11% 29%	24% 14% 38%	20% 14% 33%	15% 10% 25%	12% 7% 19%	25% 11% 36%	21% 14% 34%	25% 22% 47%
Looked for a present	11% 13% 24%	15% 13% 29%	10% 10% 20%	10% 9% 19%	4% 3% 8%	14% 8% 22%	18% 62% 80%	25% 31% 56%

Google Market Insights   NO

Top 10 online and offline purchase drivers: avg. across verticals

● ● 2024

Top 10 online purchase drivers

	Somewhat agree	Completely agree	Top 2 Box
All relevant information conveniently accessible	33%	33%	**65%**
Easier to find a specific product	33%	31%	**63%**
Easier to find new products	33%	29%	**62%**
Easier to make a choice	31%	27%	**58%**
Products are always available regardless of season	31%	25%	**56%**
It's more convenient than offline	28%	28%	**56%**
It was cheaper online (promotion or lower prices)	24%	31%	**55%**
It best fits my lifestyle	27%	24%	**51%**
Always latest product information available	27%	23%	**50%**
It's faster than offline	23%	26%	**48%**

Top 10 offline purchase drivers

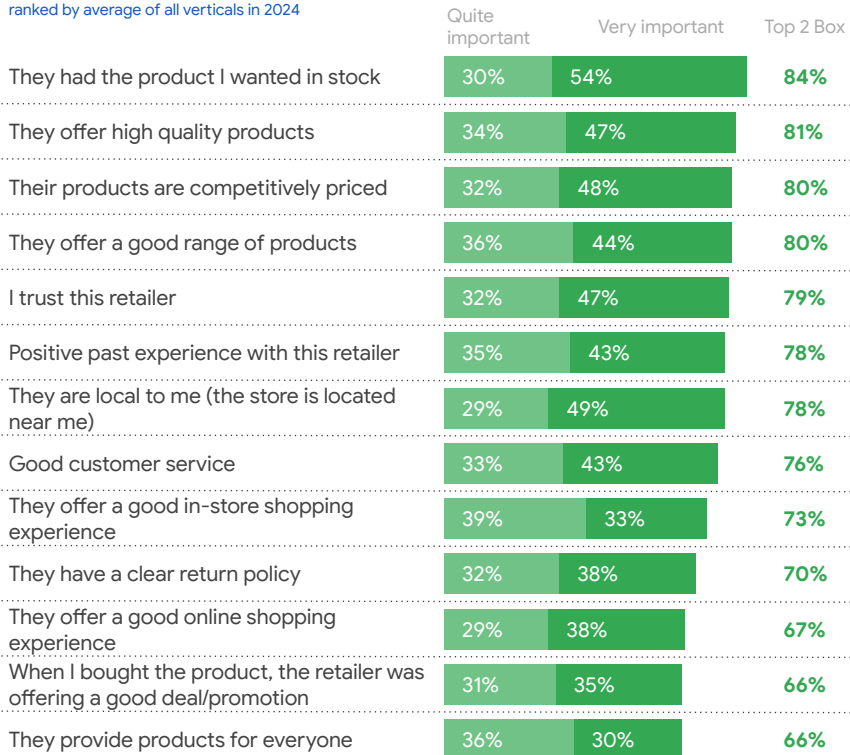|	Somewhat agree	Completely agree	Top 2 Box
I can take the product home with me directly	16%	68%	**83%**
I can see, feel, or try the product more easily	23%	47%	**69%**
It's faster than online	19%	49%	**68%**
Easier to make a choice	26%	39%	**64%**
Easier to find a specific product	24%	37%	**62%**
All relevant information conveniently accessible	25%	28%	**53%**
It best fits my lifestyle	22%	31%	**53%**
Can get advice from staff	23%	27%	**50%**
Easier to find new products	22%	24%	**46%**
It's more fun than online	17%	28%	**46%**

Note: In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

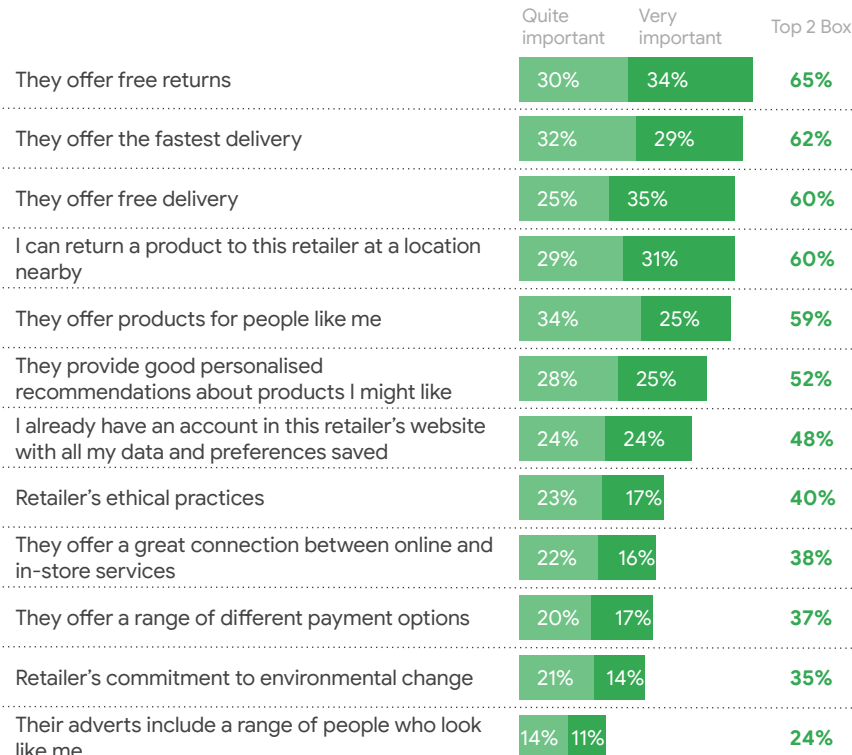Google Market Insights   NO

Reasons for retailer selection: avg. across verticals

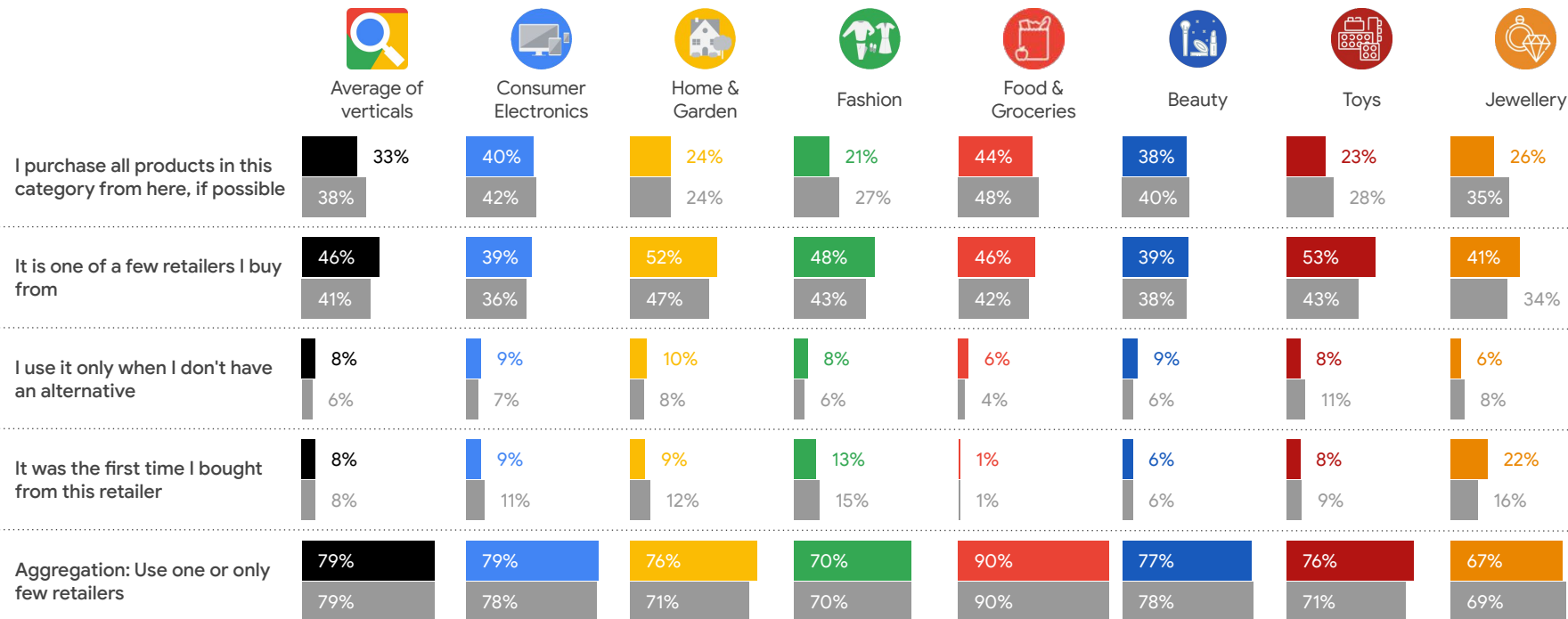**Note:** Results show Top 2 boxes (somewhat agree & completely agree) ranked by average of all verticals in 2024

● 2024 **Average of all Verticals**

	Quite important	Very important	Top 2 Box
They had the product I wanted in stock	30%	54%	**84%**
They offer high quality products	34%	47%	**81%**
Their products are competitively priced	32%	48%	**80%**
They offer a good range of products	36%	44%	**80%**
I trust this retailer	32%	47%	**79%**
Positive past experience with this retailer	35%	43%	**78%**
They are local to me (the store is located near me)	29%	49%	**78%**
Good customer service	33%	43%	**76%**
They offer a good in-store shopping experience	39%	33%	**73%**
They have a clear return policy	32%	38%	**70%**
They offer a good online shopping experience	29%	38%	**67%**
When I bought the product, the retailer was offering a good deal/promotion	31%	35%	**66%**
They provide products for everyone	36%	30%	**66%**

	Quite important	Very important	Top 2 Box
They offer free returns	30%	34%	**65%**
They offer the fastest delivery	32%	29%	**62%**
They offer free delivery	25%	35%	**60%**
I can return a product to this retailer at a location nearby	29%	31%	**60%**
They offer products for people like me	34%	25%	**59%**
They provide good personalised recommendations about products I might like	28%	25%	**52%**
I already have an account in this retailer's website with all my data and preferences saved	24%	24%	**48%**
Retailer's ethical practices	23%	17%	**40%**
They offer a great connection between online and in-store services	22%	16%	**38%**
They offer a range of different payment options	20%	17%	**37%**
Retailer's commitment to environmental change	21%	14%	**35%**
Their adverts include a range of people who look like me	14%	11%	**24%**

Note: In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

Google Market Insights   NO

Relationship with the retailer for the last purchase

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I purchase all products in this category from here, if possible	33% / 38%	40% / 42%	24% / 24%	21% / 27%	44% / 48%	38% / 40%	23% / 28%	26% / 35%
It is one of a few retailers I buy from	46% / 41%	39% / 36%	52% / 47%	48% / 43%	46% / 42%	39% / 38%	53% / 43%	41% / 34%
I use it only when I don't have an alternative	8% / 6%	9% / 7%	10% / 8%	8% / 6%	6% / 4%	9% / 6%	8% / 11%	6% / 8%
It was the first time I bought from this retailer	8% / 8%	9% / 11%	9% / 12%	13% / 15%	1% / 1%	6% / 6%	8% / 9%	22% / 16%
Aggregation: Use one or only few retailers	79% / 79%	79% / 78%	76% / 71%	70% / 70%	90% / 90%	77% / 78%	76% / 71%	67% / 69%

2023 / 2024

Google Market Insights   NO

Participation in loyalty & subscription programs

2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I participate in a loyalty/rewards program or have a subscription based membership	53%	43%	47%	41%	76%	47%	36%	46%
I participate in a free loyalty/reward or subscription program	40%	27%	33%	31%	62%	39%	21%	25%
I participate in a paid (monthly or annually) loyalty/reward or subscription program	5%	11%	6%	4%	3%	4%	7%	13%
I participate in both	4%	5%	5%	3%	4%	4%	7%	7%

Google Market Insights   NO

Importance of loyalty & subscription programs

2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Free loyalty/reward or subscription program — Very important/important to me	71%	60%	70%	63%	77%	71%	70%	69%
Top 3 Reasons for participation	Discounts 82%	Discounts 71%	Discounts 79%	Discounts 87%	Discounts 84%	Discounts 79%	Discounts 79%	Discounts 76%
	Free delivery 27%	Free delivery 46%	Free delivery 40%	Free delivery 42%	Exclusive products 17%	Free delivery 47%	Free delivery 47%	Small gifts 51%
	Exclusive products 26%	Free returns 42%	Free returns 32%	Exclusive products 33%	Small gifts 15%	Small gifts 37%	Fast delivery 43%	Free delivery 48%
Paid loyalty/reward or subscription program — Very important/important to me	67%	66%	72%	53%	56%	83%	76%	74%
Top 3 Reasons for participation	Discounts 59%	Exclusive products 53% Receive information earlier 49%	Free delivery 59%	Discounts 100%	Discounts 52%	Discounts 72%	Fast delivery 66%	Free returns 52%
	Free delivery 50%		Fast delivery 50%	Free delivery 57%	Free delivery 41%	Exclusive products 63%	Free delivery 64%	Discounts 48%
	Exclusive products 45%	Fast delivery 45%	Small gifts 48%	Free returns 57%	Exclusive products 29%	Free delivery 58%	Discounts 63%	Fast delivery 44%

Google Market Insights NO

Purchase made from a new store in the last 4 weeks

Legend: ● 2021 ● 2022 ● 2023 ●●●●●●●● 2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
2024	27%	33%	29%	24%	18%	29%	29%	49%
2023	29%	42%	31%	27%	18%	28%	49%	60%
2022		35%	25%	23%	21%		33%	52%
2021		42%	38%	32%		27%	49%	

Google Market Insights   NO

Purchase made from a new retailer/brand/marketplace

2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
New retailer	57%	54%	56%	59%	55%	58%	66%	56%
New brand	50%	54%	51%	42%	52%	48%	54%	55%
New marketplace	17%	15%	12%	22%	13%	17%	22%	18%

Google Market Insights   NO

Reasons for purchasing from a new store

It was cheaper
- 34%
- 29%

It was more convenient for me
- 25%
- 27%

Better quality
- 21%
- 21%

It was faster
- 20%
- 23%

Retailer/brand had positive ratings or reviews
- 18%
- 23%

Dealer/brand was recommended
- 17%
- 20%

I saw an ad from this retailer/brand
- 17%
- 17%

The dealer/brand showed up in the results on the search engine I used
- 15%
- 14%

Retailer/brand is available online and also offers a good offline experiences
- 15%
- 18%

The product was available
- 14%
- 12%

Dealer/brand is from my region
- 14%
- 15%

Retailer/brand offered a free service or a free sample
- 12%
- 15%

Dealer/brand produces sustainably
- 12%
- 14%

● 2023   ● 2024

Google Market Insights   NO

Method of payment for last purchase

● 2024

Debit card | 53%

Online payment service (e.g. PayPal, Lydia, Bizum etc.) | 4%

Credit card | 18%

Cash | 3%

Buy Now Pay Later (e.g. Klarna, PayPal Credit) | 10%

None of these | 3%

Mobile payment (e.g. Google Pay, Apple Pay, Blik) | 7%

Note: Results show Average of verticals

Google Market Insights   NO

Online buyers: respondents experiencing pain points

○ 2019 ○ 2021 ○ 2022 ● 2023 ● 2024

2024

49%

AVERAGE OF VERTIALS

2023

57%

Consumer Electronics
- 54%
- 64%
- 50%
- 57%
- 33%

Food & Groceries
- 50%
- 60%
- 63%

Jewellery
- 67%
- 76%
- 64%

Home & Garden
- 49%
- 53%
- 47%
- 65%
- 31%

Beauty
- 44%
- 60%
- 43%
- 38%
- 36%

Fashion
- 41%
- 42%
- 35%
- 36%
- 28%

Toys
- 56%
- 69%
- 56%
- 72%
- 44%

Google Market Insights NO

Most significant online pain points

Note: Top 8 online pain points, results ranked by Average of verticals.

Pain point	Average of verticals (2024 / 2023)	Consumer Electronics (2024 / 2023)	Home & Garden (2024 / 2023)	Fashion (2024 / 2023)	Food & Groceries (2024 / 2023)	Beauty (2024 / 2023)	Toys (2024 / 2023)	Jewellery (2024 / 2023)
The product has become more expensive recently	17% / 21%	14% / 24%	15% / 16%	12% / 12%	31% / 35%	14% / 20%	18% / 29%	19% / 22%
I couldn't buy without registering or without logging in	10% / 10%	12% / 13%	8% / 11%	10% / 7%	7% / 8%	10% / 10%	15% / 16%	13% / 16%
The product I wanted wasn't available	9% / 12%	7% / 16%	10% / 7%	6% / 12%	12% / 14%	10% / 9%	12% / 23%	12% / 13%
They didn't offer an option to return a product at a location nearby	9% / 10%	9% / 16%	9% / 8%	5% / 7%	7% / 9%	6% / 6%	11% / 18%	19% / 17%
Return of product wasn't free or it was too expensive	8% / 0%	7% / 0%	7% / 0%	6% / 0%	11% / 0%	7% / 0%	14% / 0%	10% / 0%
I didn't have time to do sufficient product research	8% / 10%	6% / 13%	8% / 16%	7% / 6%	8% / 5%	4% / 11%	13% / 18%	13% / 14%
Independent product reviews were hard to find	7% / 11%	9% / 14%	8% / 15%	5% / 5%	4% / 9%	7% / 13%	10% / 19%	15% / 21%
I needed support and couldn't contact anyone	7% / 8%	9% / 11%	6% / 9%	4% / 4%	7% / 6%	6% / 6%	8% / 16%	11% / 15%

Google Market Insights　　NO

Other online pain points

2023 (grey) · 2024 (blue)

Pain point (2024 / 2023)	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I couldn't find the product for my needs quickly	7% / 11%	6% / 14%	8% / 9%	7% / 7%	5% / 10%	7% / 13%	10% / 20%	9% / 15%
Return policy wasn't clear enough	7% / 10%	7% / 12%	3% / 10%	5% / 7%	9% / 11%	7% / 7%	6% / 15%	14% / 15%
My preferred payment method was not available	7% / 8%	11% / 10%	5% / 7%	3% / 5%	7% / 4%	5% / 9%	7% / 16%	15% / 16%
Response time of customer support was too slow	7% / 10%	7% / 13%	8% / 7%	2% / 6%	6% / 9%	7% / 8%	9% / 22%	12% / 23%
Delivery fees or options weren't clear enough	6% / 8%	7% / 9%	8% / 8%	5% / 5%	5% / 8%	6% / 6%	8% / 10%	8% / 14%
I couldn't find sufficient information on the product	6% / 10%	7% / 13%	6% / 8%	4% / 8%	5% / 7%	5% / 6%	10% / 15%	13% / 21%
Pricing wasn't clear enough	6% / 8%	8% / 11%	5% / 6%	1% / 3%	10% / 10%	8% / 6%	3% / 16%	8% / 16%
The purchase process was interrupted due to a technical issue	6% / 10%	8% / 17%	7% / 7%	2% / 5%	2% / 3%	7% / 14%	10% / 17%	15% / 15%

Google Market Insights · NO

Offline buyers: respondents experiencing pain points

○ 2019 ○ 2021 ○ 2022 ● 2023 ● 2024

2024

38%

AVERAGE OF VERTIALS

2023

40%

Consumer Electronics
- 39%
- 36%
- 41%
- 51%
- 35%

Food & Groceries
- 44%
- 50%
- 40%

Jewellery
- 35%
- 42%
- 43%

Home & Garden
- 40%
- 30%
- 33%
- 44%
- 28%

Beauty
- 40%
- 34%
- 22%
- 24%
- 21%

Fashion
- 23%
- 25%
- 22%
- 32%
- 20%

Toys
- 33%
- 31%
- 25%
- 38%
- 27%

Google Market Insights   NO

Most significant offline pain points

● 2023　● 2024

Note: Top 8 offline pain points, results ranked by Average of verticals.

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The product has become more expensive recently	25% / 27%	8% / 13%	10% / 8%	13% / 13%	39% / 44%	25% / 18%	14% / 10%	13% / 11%
I couldn't find the product for my needs quickly	4% / 3%	5% / 5%	6% / 7%	4% / 1%	3% / 3%	6% / 2%	6% / 5%	3% / 4%
The product I wanted wasn't available	4% / 3%	9% / 4%	3% / 3%	1% / 2%	6% / 4%	3% / 1%	2% / 1%	5% / 10%
Pricing wasn't clear enough	4% / 4%	1% / 10%	2% / 3%	3% / 2%	5% / 3%	2% / 6%	6% / 8%	5% / 9%
Check out took too long / lines at check out	4% / 4%	3% / 5%	3% / 3%	2% / 4%	3% / 2%	5% / 6%	7% / 5%	5% / 11%
I didn't have time to do sufficient product research	3% / 4%	5% / 7%	7% / 10%	1% / 4%	2% / 2%	4% / 2%	4% / 5%	5% / 6%
There were no delivery options	3% / 3%	4% / 4%	6% / 3%	3% / 3%	2% / 3%	3% / 2%	5% / 2%	9% / 7%
No service, no consultancy in the store	3% / 3%	3% / 12%	6% / 8%	4% / 1%	1% / 2%	3% / 4%	8% / 6%	3% / 5%

Google Market Insights　NO

Other offline pain points

2023 (grey) **2024** (yellow)

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I needed support and couldn't find staff	3% / 2%	11% / 4%	5% / 8%	1% / 3%	2% / 0%	3% / 1%	3% / 2%	5% / 6%
I wanted to look online for information while in store but didn't have access	3% / 3%	3% / 7%	7% / 6%	1% / 5%	2% / 2%	4% / 4%	3% / 3%	9% / 10%
The delivery period was longer than usual	2% / 3%	7% / 9%	8% / 7%	4% / 2%	0% / 1%	3% / 1%	1% / 5%	6% / 10%
Staff were unfriendly	2% / 2%	5% / 5%	3% / 3%	2% / 3%	1% / 1%	3% / 0%	2% / 4%	7% / 2%
The shop was closed and didn't offer an online shop	2% / 2%	3% / 5%	2% / 4%	2% / 2%	2% / 2%	1% / 1%	3% / 1%	3% / 7%
I couldn't find sufficient information on the product	1% / 2%	3% / 10%	4% / 2%	1% / 3%	0% / 1%	1% / 4%	4% / 4%	3% / 10%

Google Market Insights   NO

Ways of obtaining the product

2024

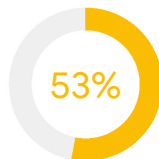|	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I bought in store and took it home myself	47%	23%	25%	43%	68%	49%	53%	28%
I bought in store and had it delivered to my home	2%	2%	7%	1%	2%	0%	1%	2%
I bought in store and had it delivered to a pick-up location near me	1%	1%	0%	0%	1%	1%	1%	1%
I bought it online or via phone and it was delivered to my home	17%	29%	18%	18%	6%	25%	13%	33%
I bought it online or via phone and it was delivered to a pick-up location near me	12%	19%	13%	19%	2%	12%	17%	16%
I bought it online or via phone and picked it up in a store	7%	14%	16%	6%	2%	4%	7%	8%
I ordered it online but paid in a store during the pick-up	3%	5%	8%	2%	2%	3%	3%	7%

Google Market Insights   NO

Reasons for pick-up in-store or at a pick-up location

2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
It was more convenient for me	53%	52%	50%	56%	62%	46%	60%	50%
It was cheaper	32%	32%	42%	17%	37%	37%	45%	32%
It was faster	32%	35%	27%	26%	39%	35%	44%	30%
It was easier to return it if I didn't want to keep it	9%	10%	12%	8%	0%	5%	16%	15%
Because I could see or test the product in the store before taking it home	5%	7%	8%	4%	0%	4%	4%	7%

Google Market Insights

NO

Share of respondents purchasing used goods in the past

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Beauty	Toys	Jewellery
2024	39%	47%	53%	37%	18%	58%	45%
2023	40%	60%	53%	33%	17%	64%	58%

Google Market Insights   NO

Location and frequency of purchasing used goods

		Average of verticals	Consumer Electronics	Home & Garden	Fashion	Beauty	Toys	Jewellery
From a physical (second hand) store	2024	56% / 18% / 26%	44% / 21% / 35%	52% / 16% / 32%	66% / 16% / 18%	48% / 14% / 38%	60% / 17% / 23%	55% / 29% / 16%
From an online retailer	2024	42% / 16% / 42%	51% / 19% / 30%	37% / 17% / 46%	33% / 11% / 56%	50% / 18% / 32%	43% / 9% / 48%	55% / 24% / 21%
From a private individual in person	2024	52% / 22% / 26%	50% / 29% / 21%	59% / 17% / 24%	50% / 17% / 33%	41% / 29% / 30%	58% / 18% / 24%	52% / 29% / 19%
From a flea market	2024	44% / 17% / 39%	32% / 17% / 51%	45% / 14% / 41%	41% / 16% / 43%	45% / 18% / 37%	55% / 15% / 30%	49% / 29% / 22%
From an online platform specialised in used goods	2024	53% / 19% / 28%	51% / 24% / 25%	60% / 21% / 19%	49% / 14% / 37%	44% / 18% / 38%	63% / 15% / 22%	48% / 23% / 29%

● Bought many times / occasionally   ● Bought once   ● Not bought yet / can't imagine ever

Google Market Insights   NO

Overall interest in sustainable product options

Grocery (plastic free / biodegradable packaging)	38%
Home & Garden (second hand / used)	31%
Fashion (secondhand / pre-loved / used)	27%
Consumer Electronics (refurbished)	22%
Toys (secondhand / pre-loved / used)	17%
Beauty (refillable)	16%
Jewellery (secondhand / pre-loved / used)	12%
I'm not interested in buying any of the above	29%

● 2024

Note: Results show Average of verticals

Google Market Insights   NO

Impact of cost of living

	Somewhat agree	Completely agree	Top 2 Box
I'm making budgeting and financial savings a priority because of rising inflation	32%	30%	**62%**
	34%	25%	59%
I am buying cheaper products/brands because of rising inflation	30%	26%	**56%**
	34%	23%	56%
I am using more deals/discounts/offers when shopping because of rising inflation	30%	26%	**56%**
	30%	25%	55%
I am delaying big purchases because of rising inflation	28%	27%	**55%**
	29%	26%	55%
I am buying less products overall because of rising inflation	27%	23%	**49%**
	28%	22%	50%
I am buying used goods rather than new products because of rising inflation	20%	13%	**33%**
	21%	11%	32%
I haven't changed my spending habits because of rising inflation	16%	14%	**31%**
	20%	15%	35%

Note: Results show Top 2 boxes (somewhat agree & completely agree) ranked by average of all verticals in 2024. In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

Google Market Insights   NO

Chapter 2

Product Discovery & Research

Channel usage during the shopping journey

2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
3+ Channels used	45%	64%	61%	41%	31%	45%	47%	65%
5+ Channels used	24%	40%	30%	19%	14%	25%	27%	46%
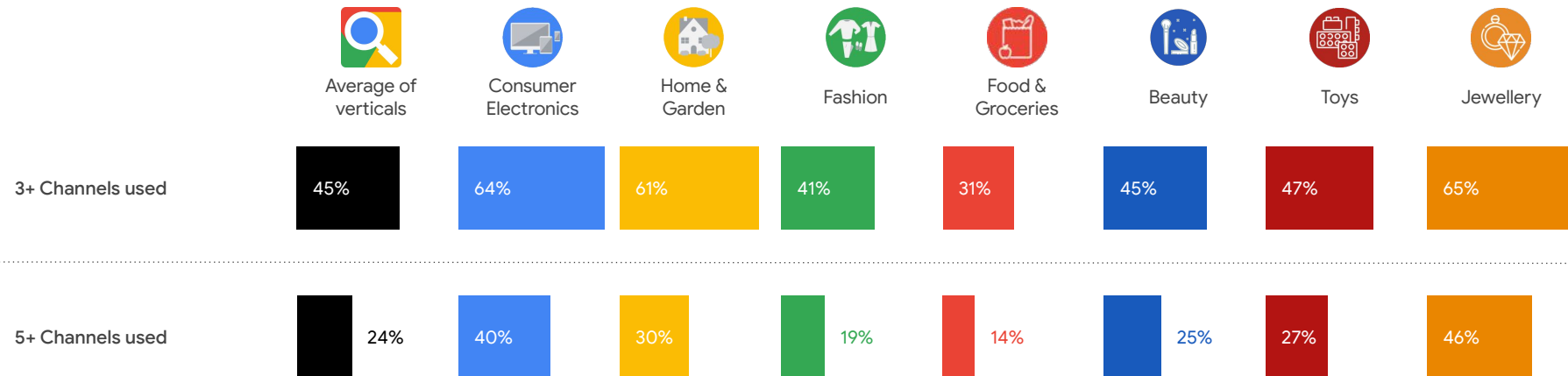
Note: These percentages indicate the proportion of respondents who used at least 3 channels or at least 5 channels out of 9 channels from a list

Google Market Insights   NO

First product awareness for last purchase

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
First Awareness Online	30%	48%	43%	37%	11%	25%	29%	52%
First Awareness Through Offline Touch Points	29%	23%	34%	33%	26%	25%	37%	32%
First Awareness Through Previous Product Experience	26%	11%	8%	19%	45%	37%	9%	3%
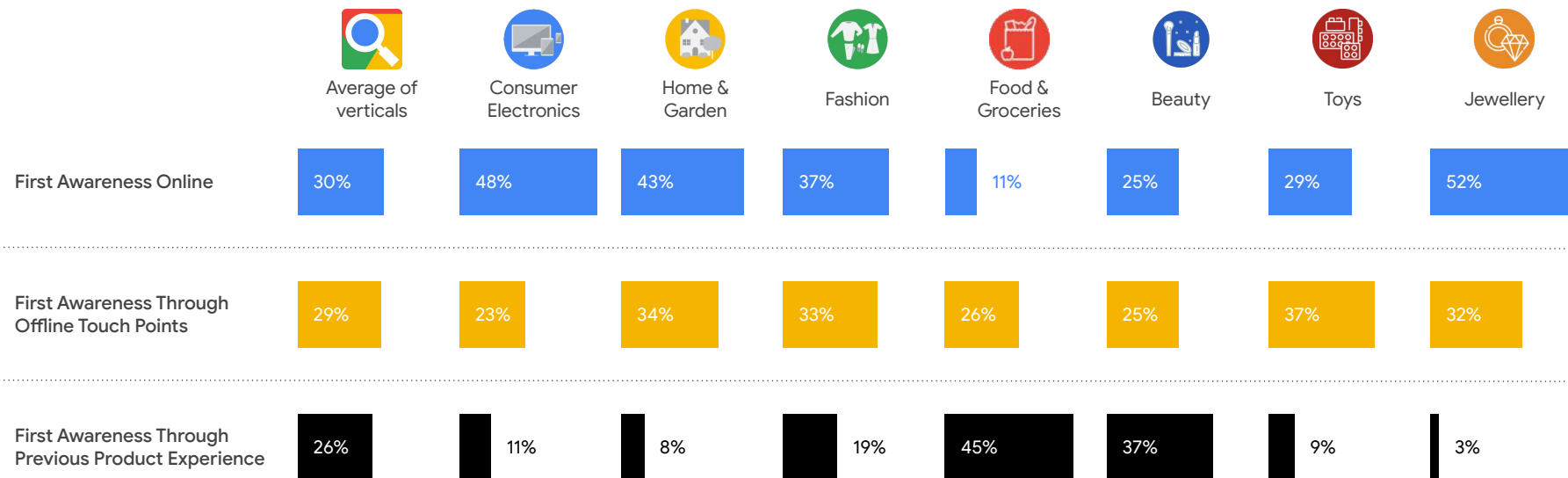
Note: aggregated results

First Awareness Online - respondents who claim that they first got aware of the product via social media or an app on smartphone or search engine or on the internet.
First Awareness Offline - respondents who claim that they first got aware of the product by a sales assistant recommendation or in a brochure/ catalog or newspaper/ magazine or saw the product in the store/ mall or on the radio or TV or recommendation from a friend or outdoor ad.
First Awareness Through Previous Experience - respondents who said that they bought the product before.

● Online ● Offline 2024

Google Market Insights   NO

What comes first - retailer or brand?

Consumer Electronics

2024	51%	35%	14%
2023	46%	38%	16%

Food & Groceries

2024	44%	38%	17%
2023	41%	39%	19%

Jewellery

2024	27%	41%	32%
2023	37%	42%	21%

Home & Garden

2024	30%	45%	25%
2023	30%	42%	28%

Beauty

2024	53%	34%	13%
2023	56%	26%	19%

AVERAGE OF ALL VERTICALS

2024	40%	38%	22%
2023	40%	37%	23%

Fashion

2024	27%	38%	35%
2023	29%	37%	34%

Toys

2024	39%	35%	26%
2023	43%	32%	24%

● I already knew the **brand** I wanted to buy from
● I already knew the **retailer** I wanted to buy from
● I don't know/remember

Google Market Insights   NO

What comes first - retailer or brand?

AVERAGE OF ALL VERTICALS

18-24 Y.O.	38%	39%	23%
25-34 Y.O.	41%	36%	23%
35-44 Y.O.	41%	38%	21%
45-54 Y.O.	42%	35%	23%
55+ Y.O.	37%	40%	22%

- 🔵 I already knew the **brand** I wanted to buy from
- 🟡 I already knew the **retailer** I wanted to buy from
- 🟢 I don't know/remember

Note: 2024 results

Google Market Insights   NO

Online research prior to purchase

Legend: ● 2019 ● 2021 ● 2022 ● 2023 ● 2024

2024

65%

AVERAGE OF VERTIALS

2023

63%

Consumer Electronics

- 89%
- 88%
- 85%
- 87%
- 86%

Food & Groceries

- 48%
- 49%
- 31%

Jewellery

- 81%
- 84%
- 71%

Home & Garden

- 85%
- 83%
- 68%
- 78%
- 77%

Beauty

- 65%
- 62%
- 39%
- 46%
- 54%

Fashion

- 63%
- 60%
- 49%
- 55%
- 46%

Toys

- 64%
- 71%
- 54%
- 59%
- 53%

Google Market Insights   NO

Online research prior to purchase

AVERAGE OF ALL VERTICALS

● 2024

18-24 Y.O.	74%
25-34 Y.O.	77%
35-44 Y.O.	73%
45-54 Y.O.	64%
55+ Y.O.	53%

Google Market Insights   NO

Online touchpoints during product research

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Search Engine 2024	54%	78%	73%	57%	34%	54%	59%	63%
2023	45%	75%	67%	44%	26%	46%	61%	61%
Online Video About This Topic 2024	39%	64%	54%	29%	26%	41%	41%	58%
2023	37%	65%	45%	29%	22%	38%	55%	69%
Social Media 2024	27%	32%	27%	21%	21%	29%	25%	60%
2023	28%	37%	27%	19%	22%	30%	37%	70%
Retailer Website/ App 2024	22%	42%	32%	28%	4%	28%	40%	14%
2023	22%	51%	28%	28%	6%	22%	45%	16%

2023　　2024

Google Market Insights　NO

Google in the shopping journey

2022   2023   2024

Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
96%	**96%**	**100%**	**91%**	**95%**	**100%**	**94%**	**95%**
95%	96%	95%	90%	100%	94%	98%	95%
96%	96%	93%	91%	100%	100%	97%	95%

Google Market Insights   NO

Consumers express their demands through "modifiers"

A search phrase is usually made up of two parts. One is the **topic** and the other the **context-setter**, describing what people want to know about a topic. We call these descriptive words "modifiers". They help people navigate information more easily.

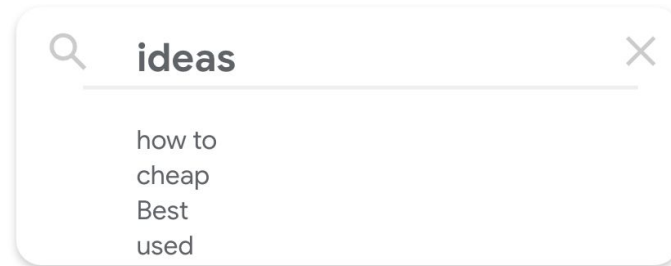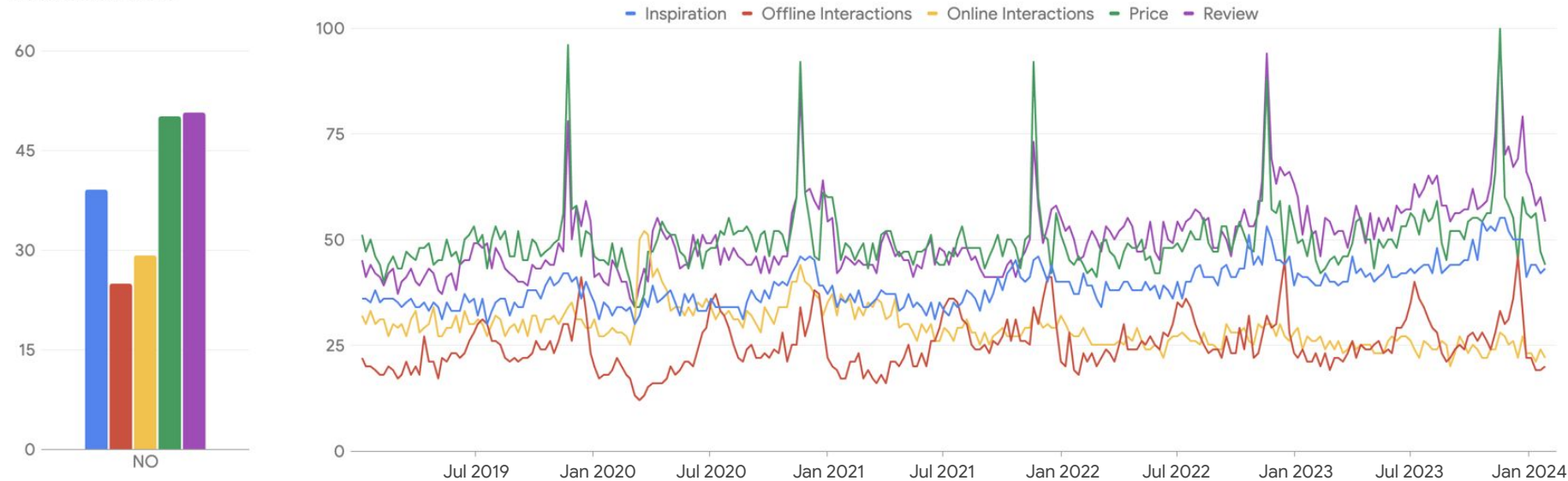## Topic
What the user is interested in
Examples:

🔍 **Gifts** ✕

dresses
restaurants
cars
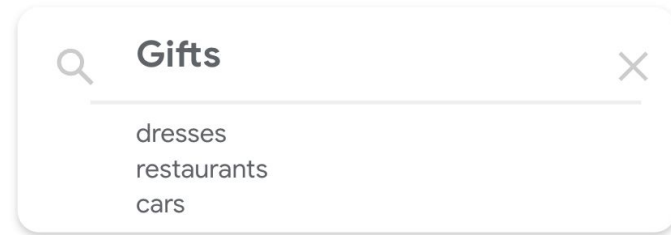
Modifiers
What users want to know about a topic
Examples:

🔍 **ideas** ✕

how to
cheap
Best
used

Google Market Insights   NO

Search interest of popular modifiers in the shopping category

Average Search Interest

Legend: Inspiration, Offline Interactions, Online Interactions, Price, Review

Google Market Insights   NO

Retailtainment

Consumer Electronics

Year	Just browsing for fun	Browsing for inspiration	Actively browsing
2024	29%	22%	50%
2023	27%	26%	48%

Food & Groceries

Year			
2024	41%	17%	41%
2023	43%	14%	43%

Jewellery

Year			
2024	38%	25%	37%
2023	36%	27%	38%

Home & Garden

Year			
2024	24%	22%	55%
2023	25%	21%	55%

Beauty

Year			
2024	36%	19%	45%
2023	38%	18%	44%

AVERAGE OF ALL VERTICALS

Year			
2024	36%	19%	45%
2023	36%	18%	46%

Fashion

Year			
2024	38%	16%	45%
2023	34%	18%	49%

Toys

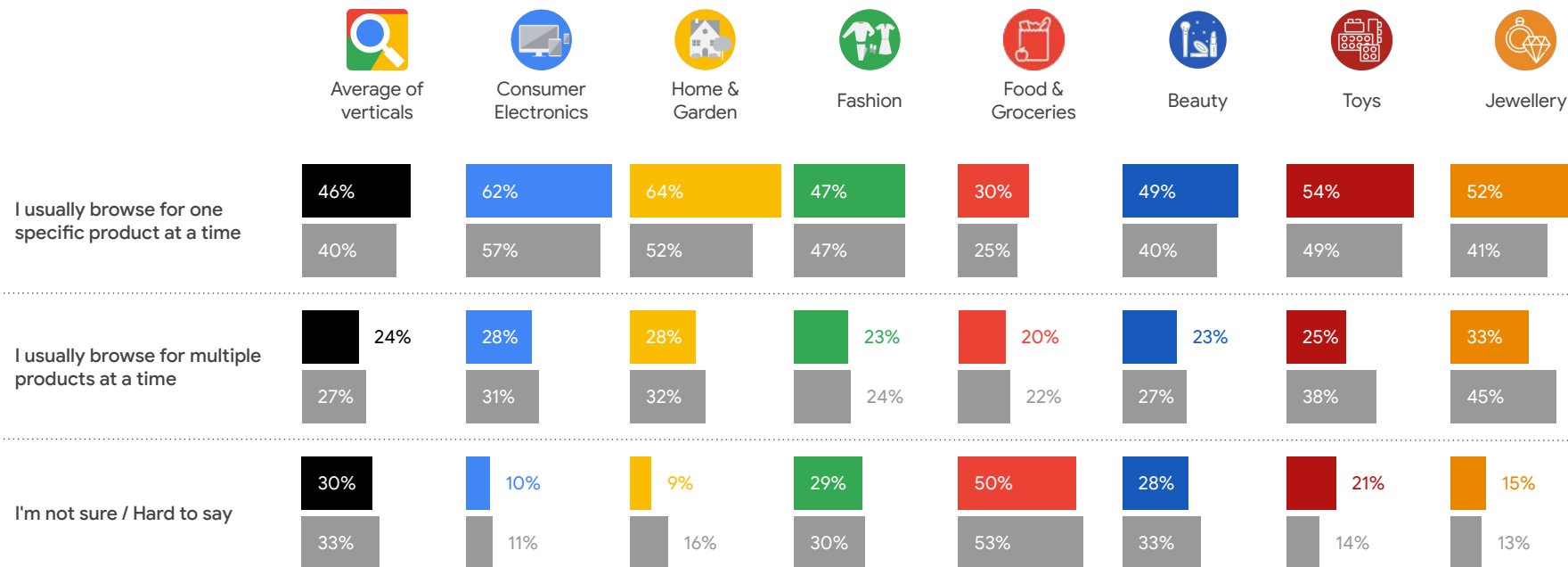| Year			
2024	33%	22%	45%
2023	32%	22%	45%

- 🔵 Just browsing for fun
- 🟡 Browsing for inspiration for a later purchase
- 🟢 Actively browsing for a product you plan to buy

Google Market Insights   NO
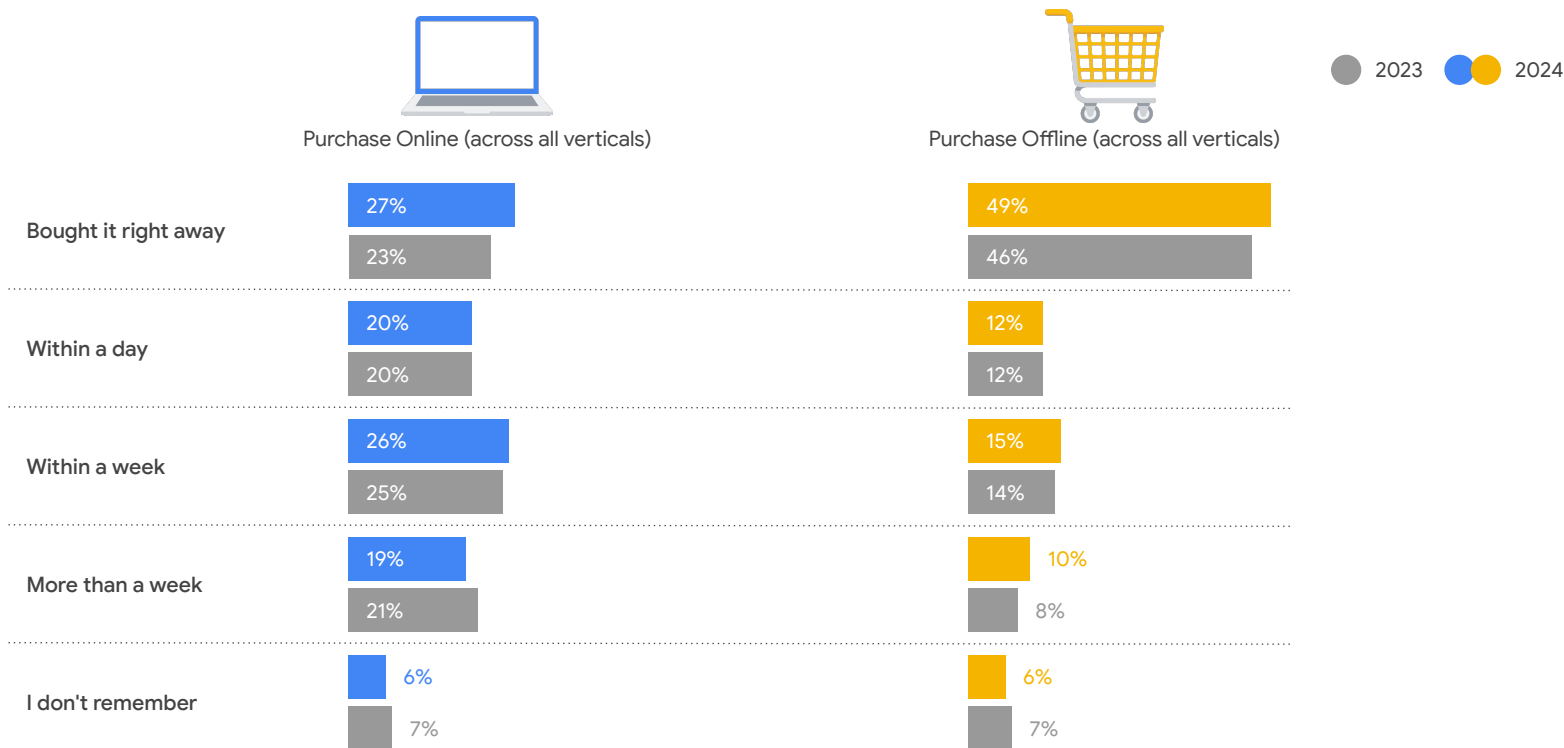
Product browsing behavior

⬤🔵🟡🟢🔴🔵🔴🟠 2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I usually browse for one specific product at a time	46% / 40%	62% / 57%	64% / 52%	47% / 47%	30% / 25%	49% / 40%	54% / 49%	52% / 41%
I usually browse for multiple products at a time	24% / 27%	28% / 31%	28% / 32%	23% / 24%	20% / 22%	23% / 27%	25% / 38%	33% / 45%
I'm not sure / Hard to say	30% / 33%	10% / 11%	9% / 16%	29% / 30%	50% / 53%	28% / 33%	21% / 14%	15% / 13%

Google Market Insights   NO

Length of product research: online vs. offline purchase

Purchase Online (across all verticals)

Purchase Offline (across all verticals)

● 2023 ● ● 2024

Bought it right away
- 27% (2024, online)
- 23% (2023, online)
- 49% (2024, offline)
- 46% (2023, offline)

Within a day
- 20% (2024, online)
- 20% (2023, online)
- 12% (2024, offline)
- 12% (2023, offline)

Within a week
- 26% (2024, online)
- 25% (2023, online)
- 15% (2024, offline)
- 14% (2023, offline)

More than a week
- 19% (2024, online)
- 21% (2023, online)
- 10% (2024, offline)
- 8% (2023, offline)

I don't remember
- 6% (2024, online)
- 7% (2023, online)
- 6% (2024, offline)
- 7% (2023, offline)

Google Market Insights   NO

Length of product research: vertical split

2023 ● ● ● ● ● ● ● ● 2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Bought it right away	38% / 35%	18% / 17%	22% / 20%	42% / 42%	44% / 37%	44% / 44%	40% / 39%	31% / 24%
Within a day	16% / 16%	16% / 18%	19% / 19%	17% / 19%	16% / 14%	15% / 10%	12% / 18%	15% / 21%
Within a week	20% / 19%	33% / 30%	29% / 28%	19% / 20%	11% / 12%	19% / 18%	30% / 23%	24% / 26%
More than a week	14% / 14%	29% / 30%	27% / 27%	13% / 13%	5% / 6%	11% / 11%	14% / 15%	27% / 25%
I don't remember	6% / 7%	2% / 4%	3% / 3%	6% / 4%	9% / 13%	8% / 8%	1% / 2%	2% / 3%

Google Market Insights   NO

Usage of new technologies in the shopping journey

● 2023   ● 2024

Aggregation: % of consumers who used at least one tool/technology below when looking for inspiration about what to buy in the last 6 months
- 35%
- 33%

Short form videos (e.g. YouTube Shorts, Instagram reels, Facebook stories, LinkedIn stories, TikToks etc.)
- 16%
- 17%

Social commerce (products ordered via social networks, such as Youtube, Instagram, Facebook, Linkedin, TikTok etc.)
- 14%
- 16%

Visual search (i.e. take a photo or use an image of an item within a search engine to get more information about it, for example Google Lens)
- 13%
- 12%

Chatbot on a brand or a retailer website/app (e.g. talking to a virtual interface to find the product of your needs)
- 7%

Chat based AI tools (e.g. Chat GPT, Bard)
- 5%

VR (Virtual reality) (e.g. using a VR headset to immerse yourself in an environment)
- 4%
- 6%

AR (Augmented reality) (e.g. trying a piece of clothing or an accessory on virtually)
- 4%
- 6%

I have not used any of these technologies
- 65%
- 67%

Google Market Insights   NO

Chapter 3
Mobile shopping

Devices used for online purchase

● 2024

	Across all age groups	18-24 Y.O.	25-34 Y.O.	35-44 Y.O.	45-54 Y.O.	55+ Y.O.
A smartphone	52%	58%	58%	66%	57%	31%
A laptop or desktop computer	27%	27%	24%	23%	24%	35%
A tablet	6%	6%	6%	3%	7%	5%
A smart speaker or voice assistant device	0%	0%	0%	0%	0%	0%

Google Market Insights   NO

Smartphone usage during product research

Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
58%	76%	74%	54%	45%	57%	61%	77%
52%	71%	69%	46%	38%	50%	65%	80%
	74%	65%	44%	34%	35%	54%	69%
65%	65%	65%	38%		28%	52%	
64%	59%		28%		33%	42%	

Google Market Insights   NO

Smartphone usage during online shopping

● 2019 ● 2021 ● 2022 ● 2023 ●●●●●●● 2024

Consumer Electronics
- 49%
- 32%
- 43%
- 37%
- 27%

Beauty
- 59%
- 60%
- 46%
- 49%
- 22%

Home & Garden
- 47%
- 47%
- 54%
- 41%
- 29%

Toys
- 59%
- 56%
- 67%
- 51%
- 37%

Fashion
- 53%
- 49%
- 53%
- 33%
- 27%

Jewellery
- 66%
- 49%
- 59%

Food & Groceries
- 42%
- 31%
- 52%

52%

Average of verticals

use their smartphone when making an online purchase across all verticals

Google Market Insights   NO

Purchases via smartphones: websites vs. apps

Consumer Electronics

Year	Website	App
2024	82%	18%
2023	74%	26%
2022	93%	7%
2021	69%	31%
2019	85%	15%

Food & Groceries

Year	Website	App
2024	42%	58%
2023	40%	60%
2022	28%	72%

Jewellery

Year	Website	App
2024	62%	38%
2023	59%	41%
2022	59%	41%

Home & Garden

Year	Website	App
2024	80%	20%
2023	62%	38%
2022	84%	16%
2021	80%	20%
2019	87%	13%

Beauty

Year	Website	App
2024	80%	20%
2023	68%	32%
2022	78%	22%
2021	75%	25%
2019	72%	28%

AVERAGE OF ALL VERTICALS

Year	Website	App
2024	70%	30%
2023	64%	36%

Fashion

Year	Website	App
2024	66%	34%
2023	68%	32%
2022	56%	44%
2021	44%	56%
2019	61%	39%

Toys

Year	Website	App
2024	84%	16%
2023	66%	34%
2022	91%	9%
2021	66%	34%
2019	58%	42%

● Website   ● App

Note: Excluding respondents who did not remember how they bought via their smartphone

Google Market Insights   NO

Shopping app installations

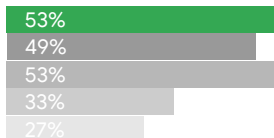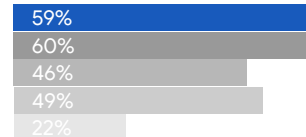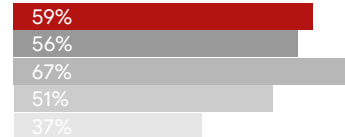Legend: 2019, 2021, 2022, 2023, 2024

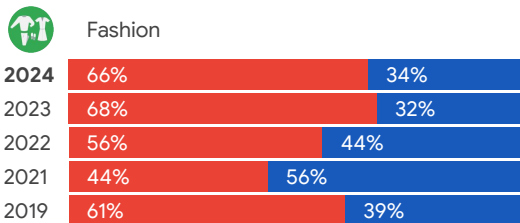Columns: Average of verticals · Consumer Electronics · Home & Garden · Fashion · Food & Groceries · Beauty · Toys · Jewellery

Coupons and promotions app

Year	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
2024	37%	37%	37%	27%	42%	37%	45%	43%
2023	36%	40%	34%	29%	40%	31%	43%	44%
2022		33%	33%	24%	39%	29%	36%	33%
2021		34%	36%	25%		31%	34%	
2019		23%	25%	17%		23%	35%	

Retailer app (featuring various brands and products)

Year	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
2024	30%	26%	27%	26%	27%	37%	37%	40%
2023	29%	34%	28%	28%	30%	22%	38%	39%
2022		28%	21%	23%	17%	21%	28%	34%
2021		30%	32%	28%		26%	31%	
2019		24%	22%	23%		22%	31%	

Delivery app

Year	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
2024	20%	28%	24%	19%	10%	24%	31%	34%
2023	18%	31%	23%	21%	5%	19%	31%	35%
2022		21%	13%	16%	8%	13%	22%	23%

Brand app (featuring only products and content from this brand)

Year	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
2024	16%	25%	20%	12%	10%	14%	21%	34%
2023	18%	25%	19%	16%	11%	18%	31%	41%
2022		17%	12%	17%	8%	8%	20%	28%
2021		17%	19%	15%		13%	22%	
2019		13%	10%	10%		9%	13%	

Google Market Insights   NO

Food & Groceries: delivery apps usage

Food & Groceries

● 2024

Kavall

16%

Google Market Insights   NO

Smart Shopper 2024