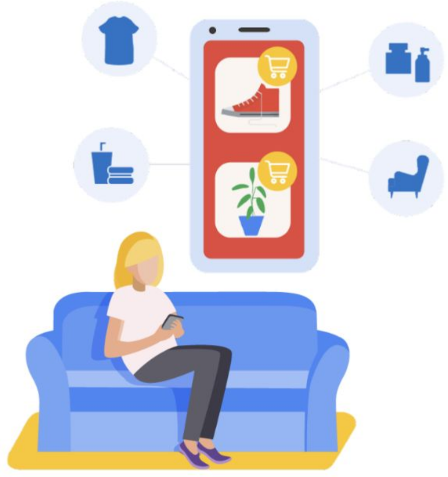
Google Market Insights

Smart Shopper 2024



Croatia country report

March 2024
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Shape of Shopping
Smart Shopper
by EMEA Market Insights

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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 = 2114, 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
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

Source: Smart Shopper Research. Google, Cint (2023+2024) / Savanta (2022) / Kantar (2020+2019), Online survey, Country: Croatia, 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 Croatia across all verticals

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

70%
Channel agnostic buyers who are not fully set on one channel

37%
Research online and purchase offline

65%
Experienced online pain points during their shopping journey

35% vs. 48% *(not adding up to 100%)*
Retailer vs. brand - what comes first?

78%
Do online research

76%
Used a search engine prior to their last purchase

95%
Used Google as a search engine for product research

47%
Used new tools/technologies when looking for inspiration about what to buy in the last 6 months

48%
Used five or more channels to shop

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: HR. 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/Beauty.

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Last purchase: online vs. offline

Consumer Electronics

	Online	Offline	
2024	67%	33%	+6
2023	61%	39%	+31
2019	30%	70%	

Food & Groceries

	Online	Offline	
2024	41%	59%	+9
2023	32%	68%	

Jewellery

	Online	Offline	
2024	65%	35%	+9
2023	56%	44%	

Home & Garden

	Online	Offline	
2024	56%	44%	+6
2023	50%	50%	+35
2019	15%	85%	

Beauty

	Online	Offline	
2024	39%	61%	+2
2023	37%	63%	

AVERAGE OF ALL VERTICALS

	Online	Offline	
2024	49%	51%	+5
2023	44%	56%	

Fashion

	Online	Offline	
2024	49%	51%	-4
2023	53%	47%	+38
2019	15%	85%	

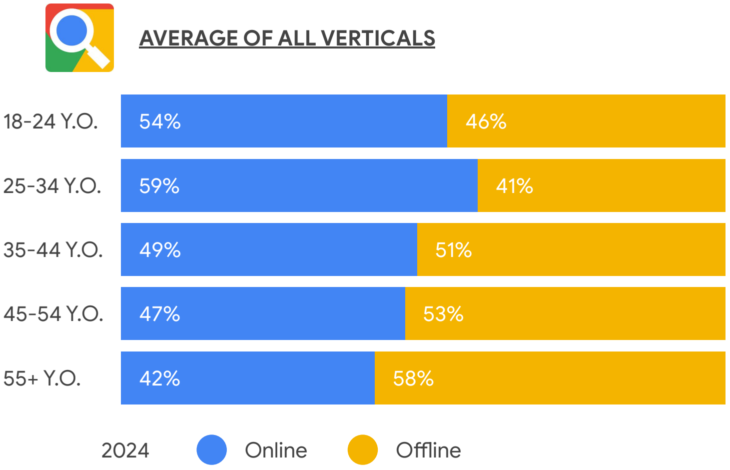
Toys

	Online	Offline	
2024	42%	58%	+1
2023	41%	59%	+23
2019	18%	82%	

Online Offline

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130/1376, CE n=231/207/357, Home n=266/257/349, Fashion n=416/431/468, Food n=472/515/0, Beauty n=421/444/0, Toys n=159/136/202, Jewellery n=150/140/0, Q1: Where did you make your last purchase?

Last purchase: online vs. offline



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, 18-24 n=218, 25-34 n=408, 35-44 n=387, 45-54 n=425, 55+ n=676, Q1: Where did you make your last purchase?

ROPO matrix: 2023 & 2024

2023, Average across all verticals

	Online research only	Online and offline research	Offline research only
Online purchase	12%	34%	2%
Offline purchase	9%	30%	13%

2024, Average across all verticals

	Online research only	**Online and offline research**	**Offline research only**
Online purchase	11%	38%	3%
Offline purchase	8%	29%	11%

Online   Offline

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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1924/1860, Aggregation of Q1_Q9_Q13: Q1: Where did you make your last purchase? / Q9. Where did you gather information online (on any device, via website, or app) regarding the product you bought, if at all? / Q13. Which of these offline sources, if any, did you use to gather information?

Purchase channel preferences & omni-channel importance

Consumer Electronics

Year	Online	Offline	Agnostic
2024	13%	10%	77%
2023	13%	13%	73%
2019	8%	28%	65%

Food & Groceries

Year	Online	Offline	Agnostic
2024	1%	39%	60%
2023	2%	47%	51%

Jewellery

Year	Online	Offline	Agnostic
2024	10%	16%	74%
2023	11%	19%	70%

Home & Garden

Year	Online	Offline	Agnostic
2024	7%	14%	79%
2023	4%	19%	77%
2019	4%	45%	51%

Beauty

Year	Online	Offline	Agnostic
2024	4%	32%	64%
2023	6%	30%	65%

AVERAGE OF ALL VERTICALS

Year	Online	Offline	Agnostic
2024	6%	23%	70%
2023	6%	27%	67%

Fashion

Year	Online	Offline	Agnostic
2024	10%	15%	75%
2023	7%	16%	77%
2019	6%	41%	52%

Toys

Year	Online	Offline	Agnostic
2024	6%	14%	79%
2023	5%	18%	77%
2019	4%	25%	71%

Online Offline Agnostic

Note: showing aggregated results

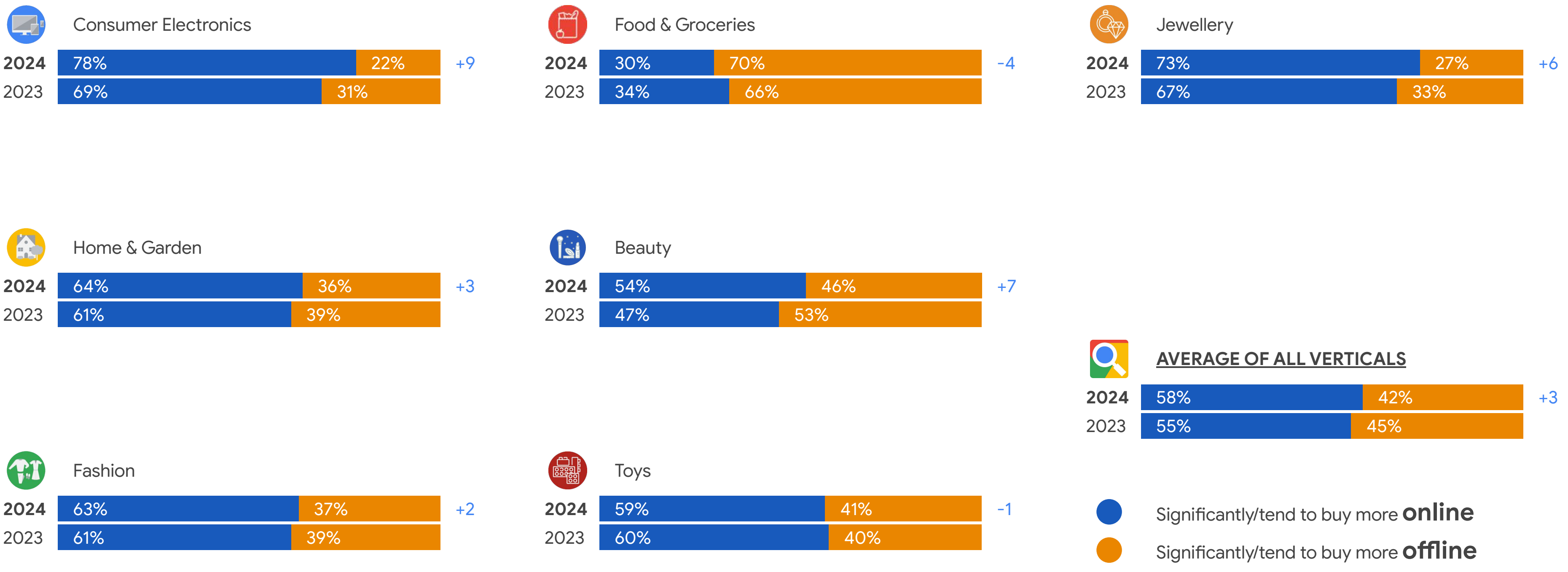
Online Preference - respondents who said that they always or almost always buy online in this category.

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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130/1376, CE n=231/207/357, Home n=266/257/349, Fashion n=416/431/468, Food n=472/516/0, Beauty n=421/444/0, Toys n=159/136/202, Jewellery n=150/140/0, Q18. How frequently do you buy this category online, if at all?

Change of buying behaviour since 2020 covid pandemic



Note: Results exclude respondents whose behaviour remained the same.

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: Frequent online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1110/990, CE n=136/119, Home n=172/134, Fashion n=231/232, Food n=194/166, Beauty n=181/188, Toys n=96/71, Jewellery n=100/81, Q39: In what way, if at all, has your buying behaviour changed since the beginning of the Covid pandemic in 2020?

Top 10 purchase triggers

2024

Note: Results show Top 2 boxes (somewhat agree & completely agree), Top 10 ranked by Average of verticals.

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Regular refill	34% 20% 54%				36% 15% 51%	32% 26% 58%		
Needed something for the current season	34% 17% 52%		24% 15% 39%	43% 27% 70%		34% 12% 46%		29% 12% 40%
Wanted a personal reward	29% 16% 45%	29% 21% 51%	23% 14% 36%	35% 16% 51%	32% 14% 46%	27% 14% 40%	18% 10% 28%	34% 26% 60%
Wanted something up-to-date or new	30% 15% 45%	35% 23% 58%	32% 21% 53%	38% 16% 54%	25% 8% 32%	20% 10% 29%	26% 14% 40%	41% 27% 67%
Promotion	27% 13% 40%	27% 17% 43%	23% 13% 35%	33% 13% 46%	32% 13% 45%	23% 10% 33%	19% 12% 30%	26% 14% 39%
Needed something for a special occasion	24% 15% 39%			22% 9% 32%				28% 30% 58%
I was curious and wanted to test the product	23% 10% 33%	19% 10% 29%	20% 8% 28%	22% 5% 27%	28% 10% 39%	23% 10% 33%	20% 13% 33%	28% 16% 44%
Looked for a present	19% 14% 33%	18% 13% 30%	11% 9% 20%	14% 8% 23%	22% 6% 28%	20% 8% 28%	25% 56% 80%	27% 39% 66%
Came across it spontaneously	24% 9% 33%	20% 7% 27%	21% 9% 30%	27% 10% 37%	25% 7% 32%	20% 8% 28%	25% 14% 39%	28% 17% 44%
Talked about a related topic with someone	22% 8% 31%	30% 12% 42%	24% 8% 33%	18% 5% 23%	22% 6% 28%	18% 7% 25%	26% 14% 39%	28% 16% 45%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, CE n=231, Home n=266, Fashion n=416, Food n=472, Beauty n=421, Toys n=159, Jewellery n=150, Q6: Why did you start looking for the product you bought? To what extent do you agree or disagree with the following statements?

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

Note: Results show Top 2 boxes (somewhat agree & completely agree) across verticals, Top 10 drivers

2024

Top 10 online purchase drivers

	Somewhat agree	Completely agree	Top 2 Box
Easier to find a specific product	38%	33%	71%
Product delivery to my home	31%	39%	70%
Easier to find new products	37%	32%	68%
All relevant information conveniently accessible	37%	30%	67%
It was cheaper online (promotion or lower prices)	32%	32%	64%
Always latest product information available	37%	26%	63%
Easier to make a choice	37%	25%	62%
It's more convenient than offline	32%	30%	62%
It's faster than offline	31%	30%	61%
Products are always available regardless of season	35%	26%	60%

Top 10 offline purchase drivers

	Somewhat agree	Completely agree	Top 2 Box
I can take the product home with me directly	26%	58%	84%
I can see, feel, or try the product more easily	30%	52%	82%
Easier to make a choice	33%	36%	69%
All relevant information conveniently accessible	35%	30%	65%
It's faster than online	25%	40%	65%
Can get advice from staff	33%	31%	64%
Easier to find a specific product	33%	30%	63%
It best fits my lifestyle	35%	25%	60%
Easier to find new products	32%	25%	57%
It's more fun than online	30%	26%	56%

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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, Online n=1033, Offline n=1081, Q17_A, Q17_B: Why did you buy online / offline? How much do you agree or disagree with the following statements?

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
Their products are competitively priced	43%	41%	84%
They offer a good range of products	52%	32%	84%
They offer high quality products	46%	36%	82%
They have a clear return policy	42%	40%	81%
They had the product I wanted in stock	42%	39%	81%
Positive past experience with this retailer	45%	35%	80%
They offer free returns	35%	43%	78%
I trust this retailer	46%	30%	76%
When I bought the product, the retailer was offering a good deal/promotion	41%	34%	75%
I can return a product to this retailer at a location nearby	37%	33%	70%
They offer free delivery	31%	40%	70%
They provide products for everyone	45%	25%	70%
They offer products for people like me	45%	22%	67%

	Quite important	Very important	Top 2 Box
They offer a good online shopping experience	40%	23%	63%
They offer the fastest delivery	37%	26%	63%
Good customer service	39%	24%	62%
They offer a good in-store shopping experience	42%	17%	59%
They provide good personalised recommendations about products I might like	37%	21%	57%
They are local to me (the store is located near me)	39%	18%	57%
Retailer's ethical practices	36%	17%	53%
I already have an account in this retailer's website with all my data and preferences saved	28%	23%	51%
They offer a great connection between online and in-store services	30%	21%	50%
They offer a range of different payment options	30%	20%	50%
Retailer's commitment to environmental change	32%	11%	43%
Their adverts include a range of people who look like me	19%	8%	27%

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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, Q1_X. How important was each of the below factors when you selected this retailer to buy the product in the category?

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	22% / 19%	24% / 17%	13% / 13%	13% / 14%	27% / 19%	32% / 32%	13% / 9%	27% / 22%
It is one of a few retailers I buy from	65% / 65%	57% / 57%	69% / 68%	71% / 67%	67% / 76%	64% / 59%	69% / 68%	44% / 45%
I use it only when I don't have an alternative	3% / 4%	2% / 5%	4% / 6%	2% / 4%	3% / 2%	1% / 4%	5% / 6%	5% / 5%
It was the first time I bought from this retailer	8% / 8%	14% / 17%	11% / 8%	10% / 12%	0% / 1%	2% / 3%	9% / 13%	22% / 26%
Aggregation: Use one or only few retailers	87% / 85%	81% / 74%	83% / 81%	84% / 81%	94% / 95%	96% / 91%	82% / 77%	71% / 67%

2023 2024

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, CE n=231/207, Home n=266/257, Fashion n=416/431, Food n=472/516, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q1_C: Which of the following statements best describes your relationship with the retailer where you bought?

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	59%	44%	55%	42%	78%	74%	51%	39%
I participate in a free loyalty/reward or subscription program	50%	36%	44%	35%	68%	65%	42%	29%
I participate in a paid (monthly or annually) loyalty/reward or subscription program	2%	3%	4%	2%	1%	2%	2%	3%
I participate in both	4%	3%	4%	2%	4%	4%	5%	5%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, CE n=231, Home n=266, Fashion n=416, Food n=472, Beauty n=421, Toys n=159, Jewellery n=150,
(Top) Q35. Do you participate in a loyalty/rewards program (e.g. customer card, points collection) or subscription based membership (e.g. Amazon Prime) in this category?
(Bottom) Q35_1. You have just mentioned that you participate in a loyalty/reward or subscription program. Which of the following applies to you?

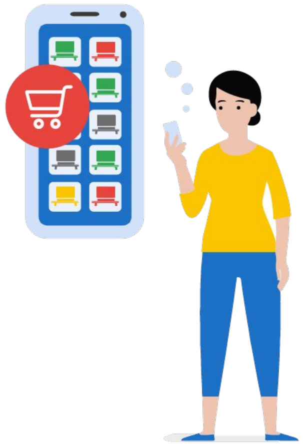
Importance of loyalty & subscription programs

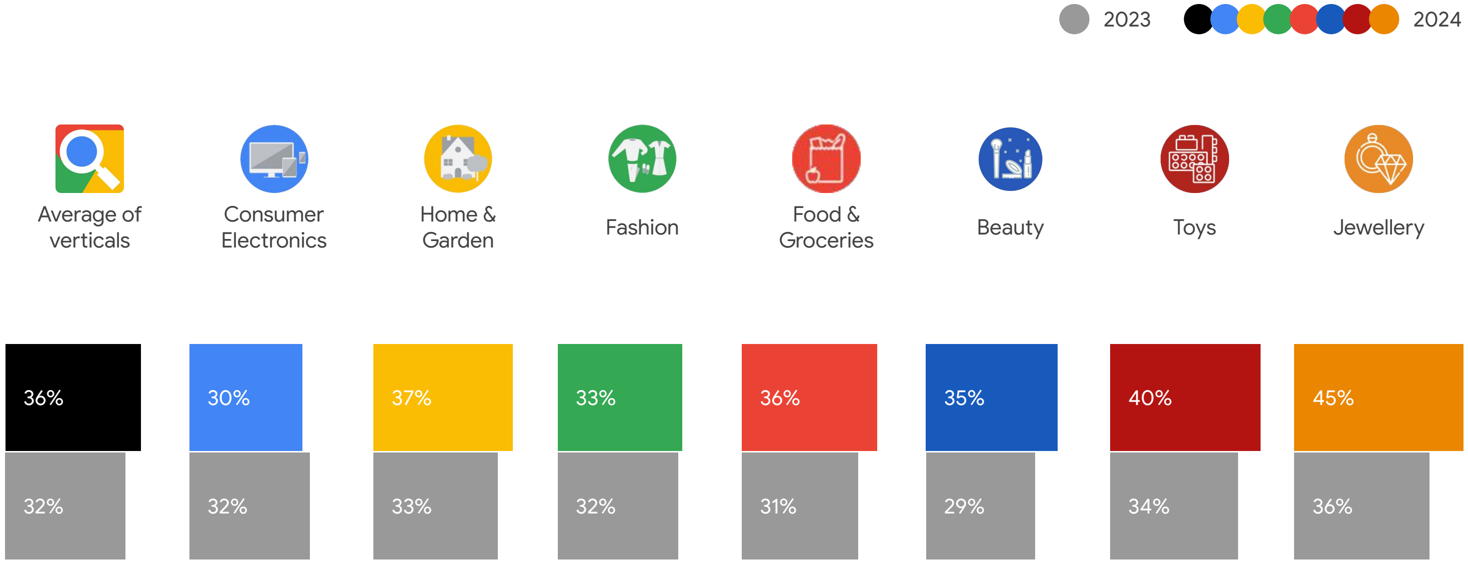
2024

		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%	67%	72%	68%	67%	79%	70%	70%
	Top 3 Reasons for participation	Discounts 93%	Discounts 89%	Discounts 94%	Discounts 97%	Discounts 94%	Discounts 94%	Discounts 90%	Discounts 84%
		Small gifts 46%	Exclusive products 54%	Free delivery 50%	Exclusive products 56%	Small gifts 39%	Small gifts 46%	Small gifts 58%	Free delivery 49%
		Exclusive products 43%	Small gifts 53%	Small gifts 49%	Small gifts 49%	Exclusive products 35%	Exclusive products 40%	Exclusive products 49%	Small gifts 47%
Paid loyalty/reward or subscription program	Very important/ important to me	68%	46%	51%	80%	79%	78%	69%	66%
	Top 3 Reasons for participation	Discounts 77%	Discounts 67%	Discounts 60%	Discounts 81%	Discounts 100%	Discounts 75%	Discounts 80%	Free returns 55%
		Exclusive products 44%	Small gifts 46%	Free returns 37%	Exclusive products 64%	Receive information earlier 44%	Fast delivery 51%	Fast delivery 55%	Discounts 50%
		Free returns 43%	Free delivery 43%	Fast delivery 35%	Small gifts 63%	Free returns 42%	Exclusive products 50%	Free delivery 54%	Fast delivery 44%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: Subscribers of Free & Paid Loyalty/ Reward Program, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1173, CE n=98, Home n=138, Fashion n=162, Food n=345, Beauty n=295, Toys n=78, Jewellery n=57,
Q37. And how important is the participation/membership to you?
Q38. What are the reasons for your participation/membership in a loyalty/rewards/membership program?

Purchase made from a new store in the last 4 weeks

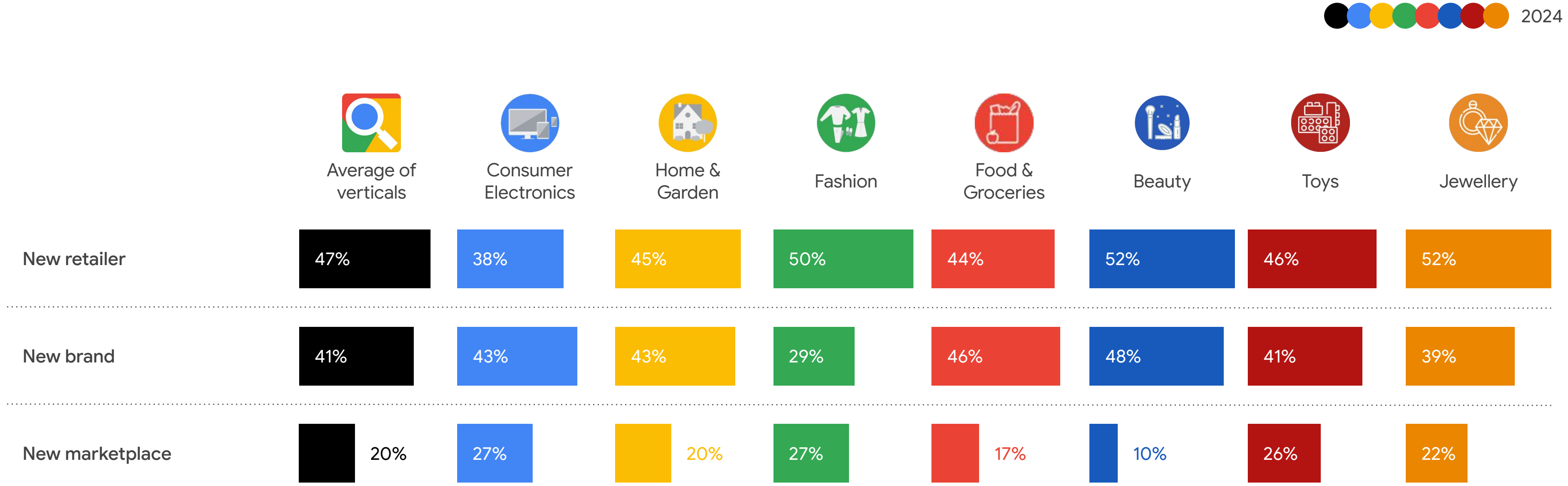




Note: Purchases made in the last 4 weeks from a retailer, a platform or brand never shopped with before

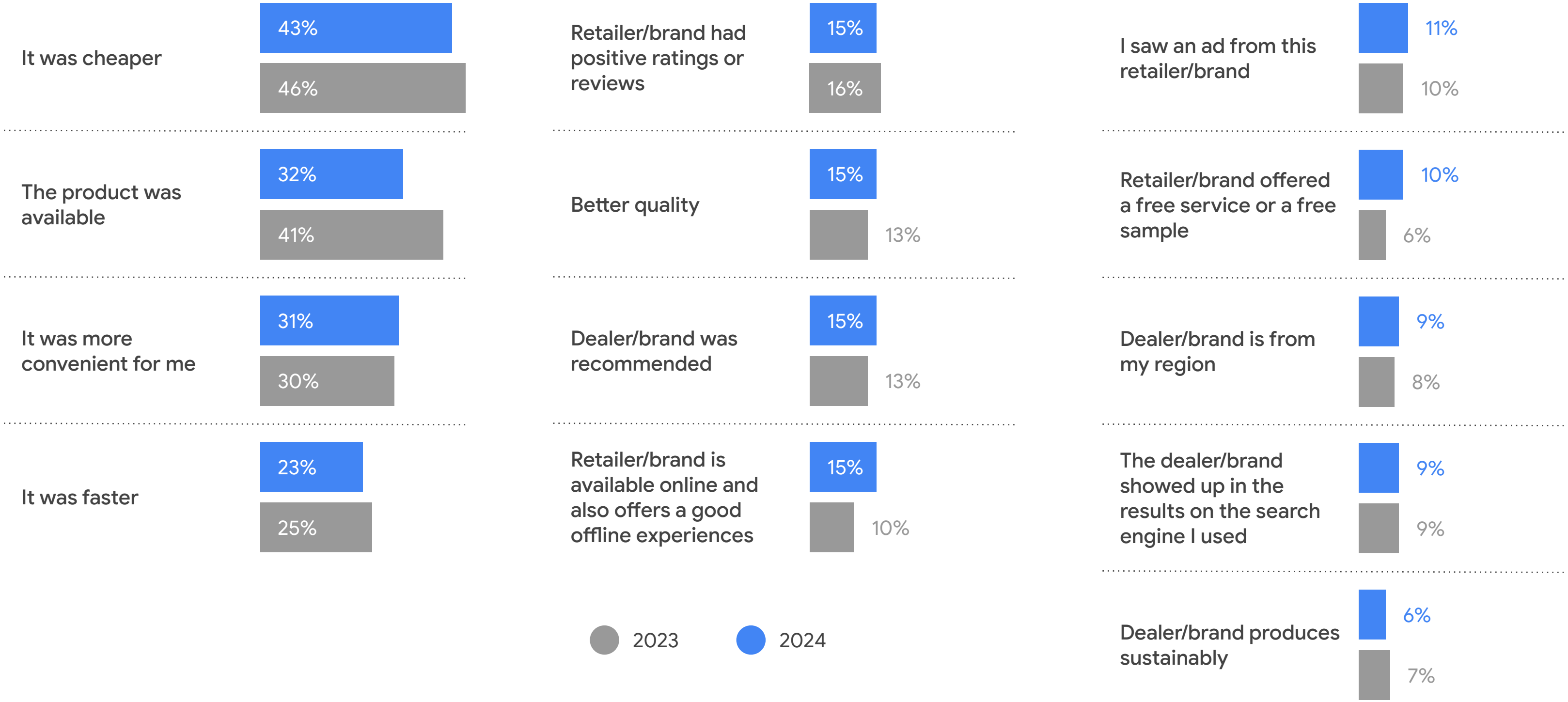
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, CE n=231/207, Home n=266/257, Fashion n=416/431, Food n=472/516, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q33: Have you made purchases in this category in the last 4 weeks from a retailer, a platform or brand you have never shopped with before?

Purchase made from a new retailer/brand/marketplace



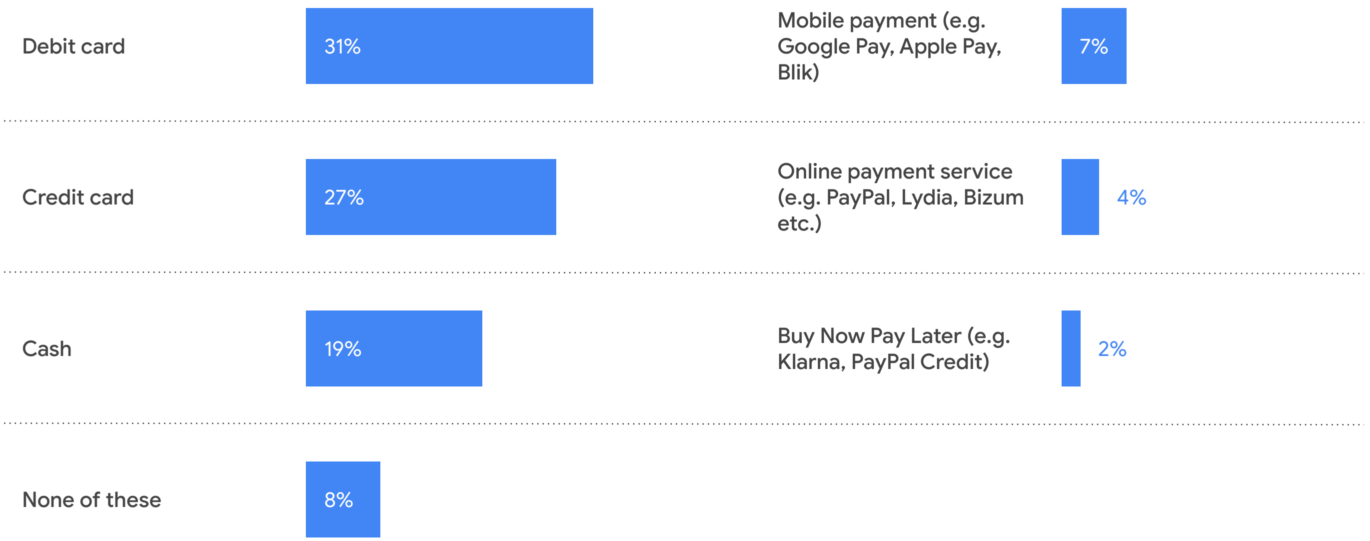
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024: Buyers of new retailer/ new marketplace/ new brand of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=754, CE n=69, Home n=99, Fashion n=137, Food n=172, Beauty n=146, Toys n=64, Jewellery n=67, Q33_1 Thinking about that new purchase, where did you buy the product from for the first time?

Reasons for purchasing from a new store



Method of payment for last purchase

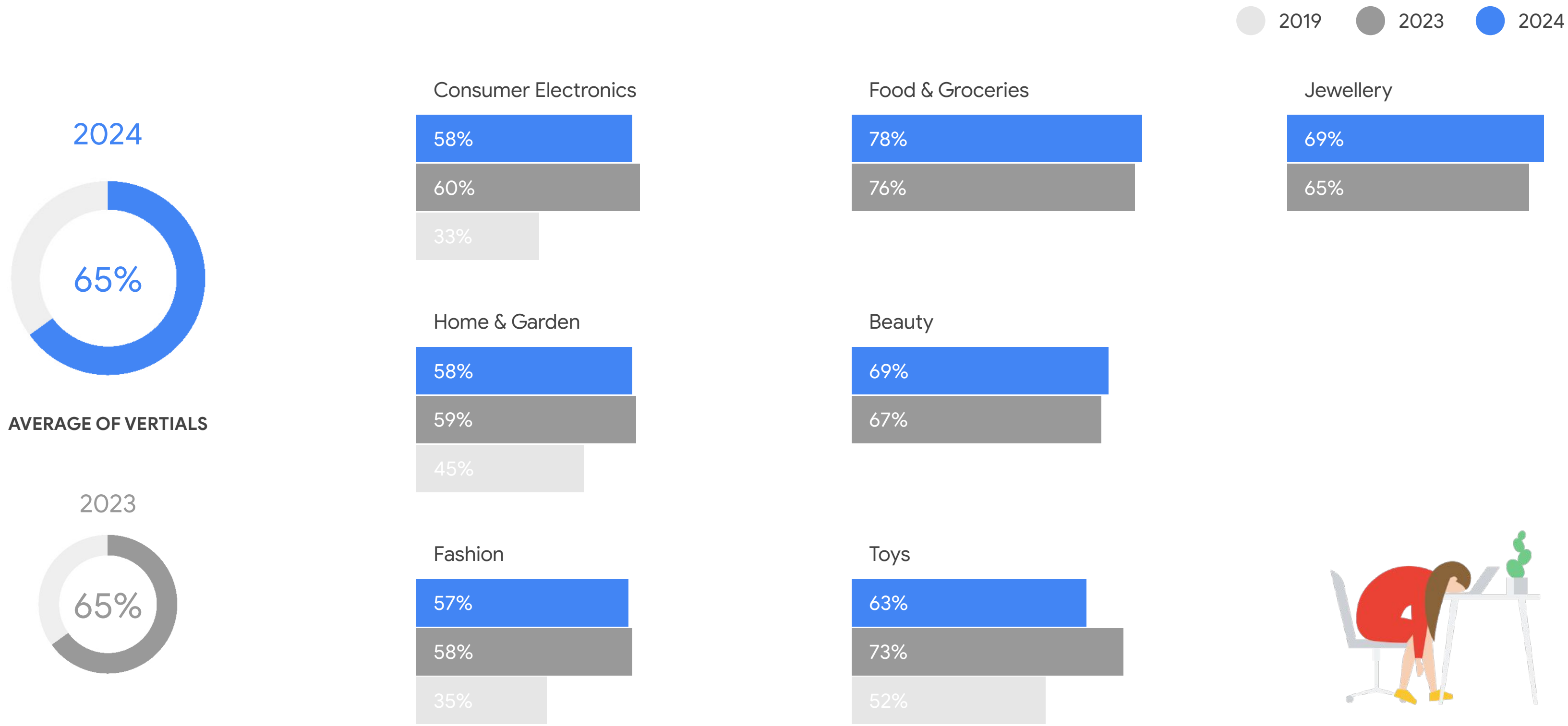
2024



Note: Results show Average of verticals

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, Q43: Thinking again about the last product within the category that you bought, how did you pay for the product?

Online buyers: respondents experiencing pain points



Most significant online pain points

2023 | 2024

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

Pain point	Year	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The product I wanted wasn't available	2024	25%	17%	17%	24%	35%	35%	21%	14%
	2023	22%	17%	18%	23%	34%	20%	20%	17%
The product has become more expensive recently	2024	18%	11%	12%	11%	34%	23%	16%	16%
	2023	19%	11%	13%	17%	31%	23%	19%	20%
I couldn't buy without registering or without logging in	2024	18%	18%	14%	14%	24%	19%	19%	17%
	2023	18%	18%	15%	13%	21%	24%	24%	19%
Independent product reviews were hard to find	2024	16%	14%	15%	15%	15%	17%	20%	16%
	2023	14%	10%	13%	12%	18%	15%	17%	15%
I couldn't find the product for my needs quickly	2024	16%	10%	12%	11%	26%	16%	15%	17%
	2023	14%	12%	9%	9%	19%	20%	20%	15%
I couldn't find sufficient information on the product	2024	13%	11%	8%	13%	16%	15%	16%	11%
	2023	12%	11%	10%	11%	12%	18%	12%	8%
I didn't have time to do sufficient product research	2024	12%	6%	13%	10%	16%	10%	17%	17%
	2023	12%	9%	9%	8%	18%	11%	16%	14%
Response time of customer support was too slow	2024	12%	16%	9%	7%	15%	13%	12%	11%
	2023	10%	12%	12%	4%	13%	12%	15%	10%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1033/945, CE n=154/126, Home n=150/127, Fashion n=205/226, Food n=195/167, Beauty n=164/164, Toys n=67/56, Jewellery n=98/78, Q4: Which of these situations did you experience during your purchase, if any?

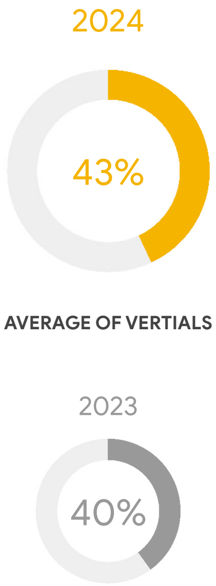
Other online pain points

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

	Year	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
They didn't offer an option to return a product at a location nearby	2024	11%	8%	12%	9%	12%	11%	15%	16%
	2023	9%	7%	9%	5%	10%	9%	12%	16%
Return of product wasn't free or it was too expensive	2024	11%	9%	9%	11%	12%	13%	12%	12%
	2023	0%	0%	0%	0%	0%	0%	0%	0%
Return policy wasn't clear enough	2024	11%	6%	10%	4%	20%	13%	11%	12%
	2023	11%	9%	13%	9%	12%	11%	15%	16%
My preferred payment method was not available	2024	9%	7%	8%	6%	11%	14%	15%	10%
	2023	9%	12%	9%	5%	12%	10%	9%	11%
Delivery fees or options weren't clear enough	2024	9%	10%	10%	1%	15%	10%	8%	11%
	2023	8%	7%	10%	6%	11%	7%	11%	9%
The purchase process was interrupted due to a technical issue	2024	9%	6%	8%	5%	14%	10%	11%	8%
	2023	8%	5%	6%	5%	12%	11%	8%	11%
I needed support and couldn't contact anyone	2024	8%	6%	7%	3%	13%	9%	12%	9%
	2023	8%	6%	7%	8%	12%	7%	9%	11%
Pricing wasn't clear enough	2024	6%	3%	4%	1%	13%	8%	6%	9%
	2023	6%	4%	6%	4%	8%	7%	5%	6%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1033/945, CE n=154/126, Home n=150/127, Fashion n=205/226, Food n=195/167, Beauty n=164/164, Toys n=67/56, Jewellery n=98/78, Q4: Which of these situations did you experience during your purchase, if any?

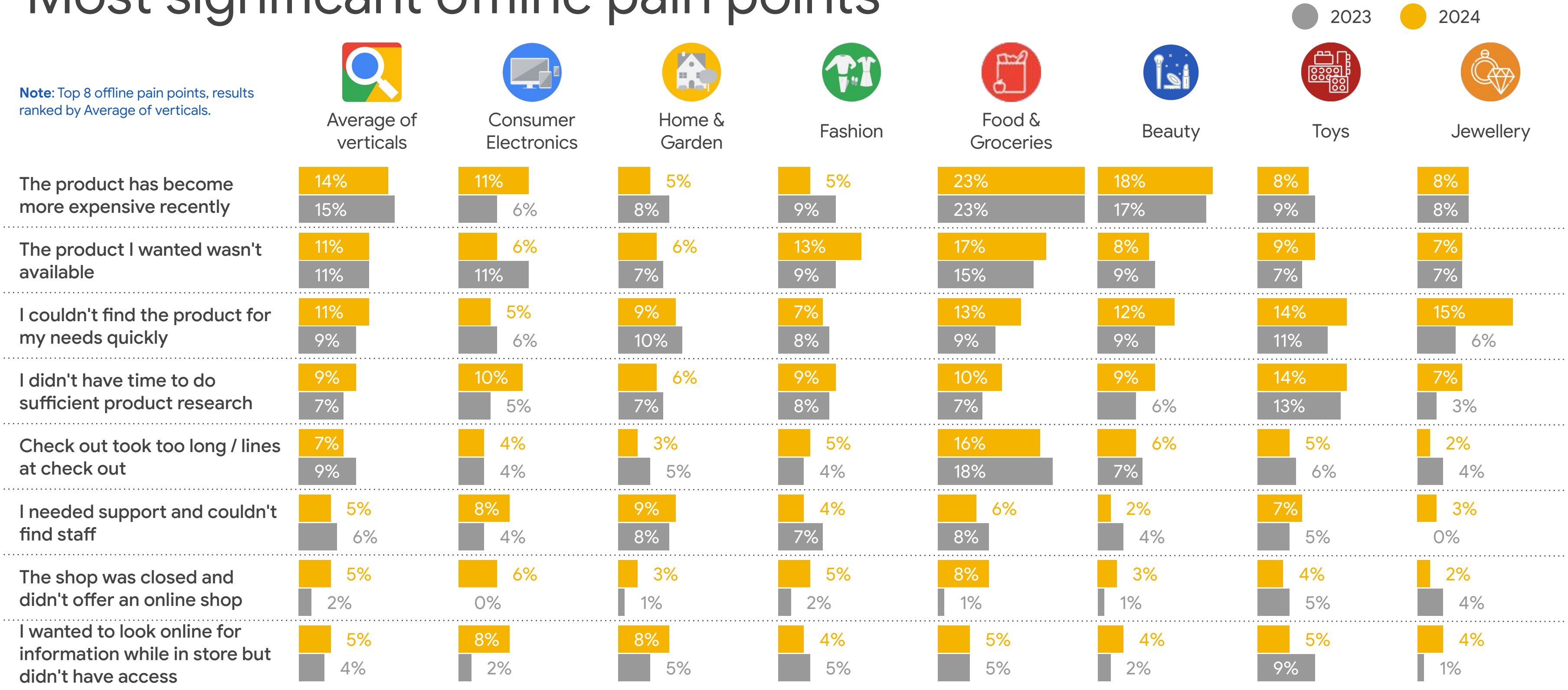
Offline buyers: respondents experiencing pain points



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023/2019: Offline buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1081/1184/1113, CE n=77/81/251, Home n=116/130/298, Fashion n=211/205/400, Food n=277/348/0, Beauty n=257/280/0, Toys n=92/79/165, Jewellery n=52/61/0, Q4: Which of these situations did you experience during your purchase, if any?

Most significant offline pain points

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



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: Offline buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1081/1184, CE n=77/81, Home n=116/130, Fashion n=211/205, Food n=277/348, Beauty n=257/280, Toys n=92/79, Jewellery n=52/61, Q4: Which of these situations did you experience during your purchase, if any?

Other offline pain points

2023 2024

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

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The delivery period was longer than usual (2024)	5%	7%	6%	7%	3%	3%	4%	4%
The delivery period was longer than usual (2023)	3%	6%	5%	5%	0%	2%	3%	1%
No service, no consultancy in the store (2024)	4%	6%	6%	3%	6%	2%	8%	3%
No service, no consultancy in the store (2023)	4%	3%	4%	2%	4%	3%	9%	2%
Pricing wasn't clear enough (2024)	4%	4%	3%	3%	7%	2%	4%	5%
Pricing wasn't clear enough (2023)	3%	2%	1%	4%	4%	3%	4%	1%
There were no delivery options (2024)	4%	6%	2%	5%	4%	3%	4%	3%
There were no delivery options (2023)	3%	5%	2%	4%	4%	1%	5%	1%
I couldn't find sufficient information on the product (2024)	4%	5%	7%	3%	2%	4%	7%	4%
I couldn't find sufficient information on the product (2023)	3%	5%	5%	5%	3%	1%	3%	3%
Staff were unfriendly (2024)	2%	4%	3%	2%	2%	2%	3%	1%
Staff were unfriendly (2023)	3%	2%	1%	4%	3%	3%	2%	3%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: Offline buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1081/1184, CE n=77/81, Home n=116/130, Fashion n=211/205, Food n=277/348, Beauty n=257/280, Toys n=92/79, Jewellery n=52/61, Q4: Which of these situations did you experience during your purchase, if any?

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	48%	30%	33%	47%	57%	60%	54%	32%
I bought in store and had it delivered to my home	2%	1%	9%	0%	0%	0%	2%	1%
I bought in store and had it delivered to a pick-up location near me	1%	1%	1%	0%	1%	1%	1%	0%
I bought it online or via phone and it was delivered to my home	19%	32%	24%	27%	8%	12%	17%	28%
I bought it online or via phone and it was delivered to a pick-up location near me	11%	12%	19%	7%	9%	10%	7%	18%
I bought it online or via phone and picked it up in a store	5%	10%	6%	4%	4%	5%	6%	7%
I ordered it online but paid in a store during the pick-up	6%	8%	5%	9%	6%	4%	9%	8%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, CE n=231, Home n=266, Fashion n=416, Food n=472, Beauty n=421, Toys n=159, Jewellery n=150, Q2_A. How did you get the product?

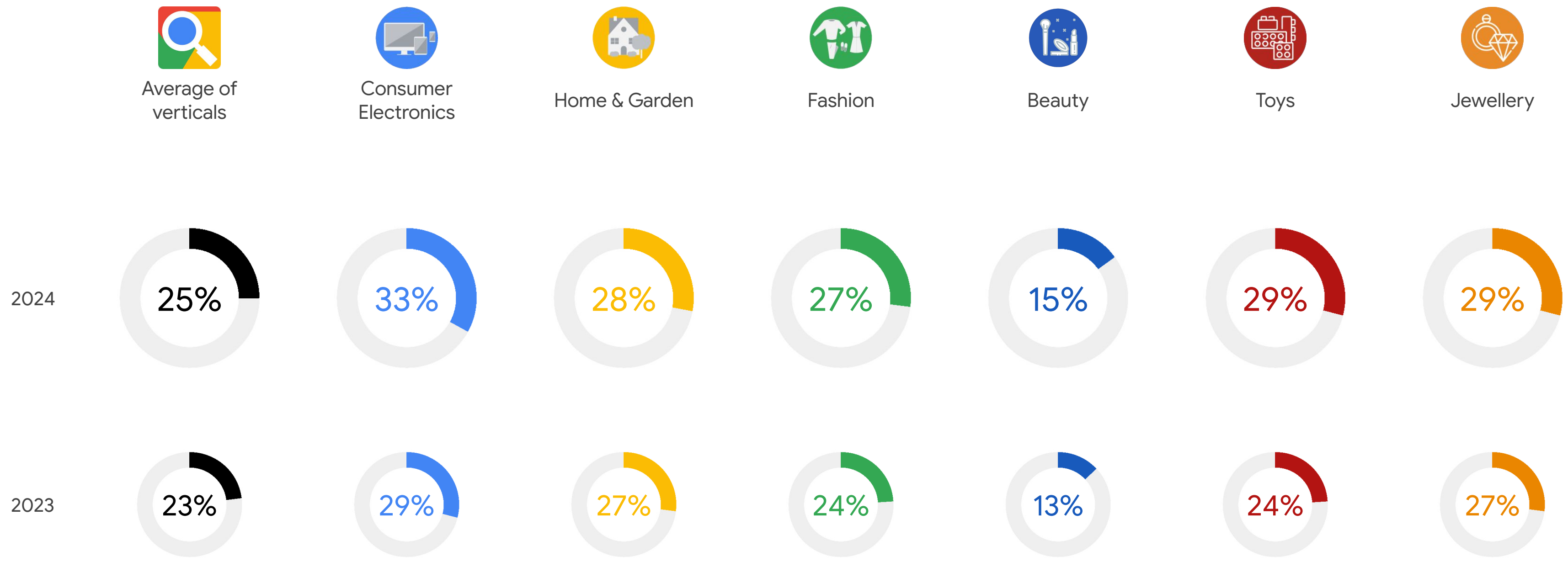
Reasons for pick-up in-store or at a pick-up location

2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
It was more convenient for me	57%	60%	56%	50%	69%	60%	51%	45%
It was faster	33%	29%	33%	24%	33%	39%	35%	42%
It was cheaper	24%	18%	31%	16%	30%	24%	25%	28%
It was easier to return it if I didn't want to keep it	9%	10%	8%	10%	0%	12%	12%	16%
Because I could see or test the product in the store before taking it home	9%	9%	14%	15%	0%	4%	16%	7%

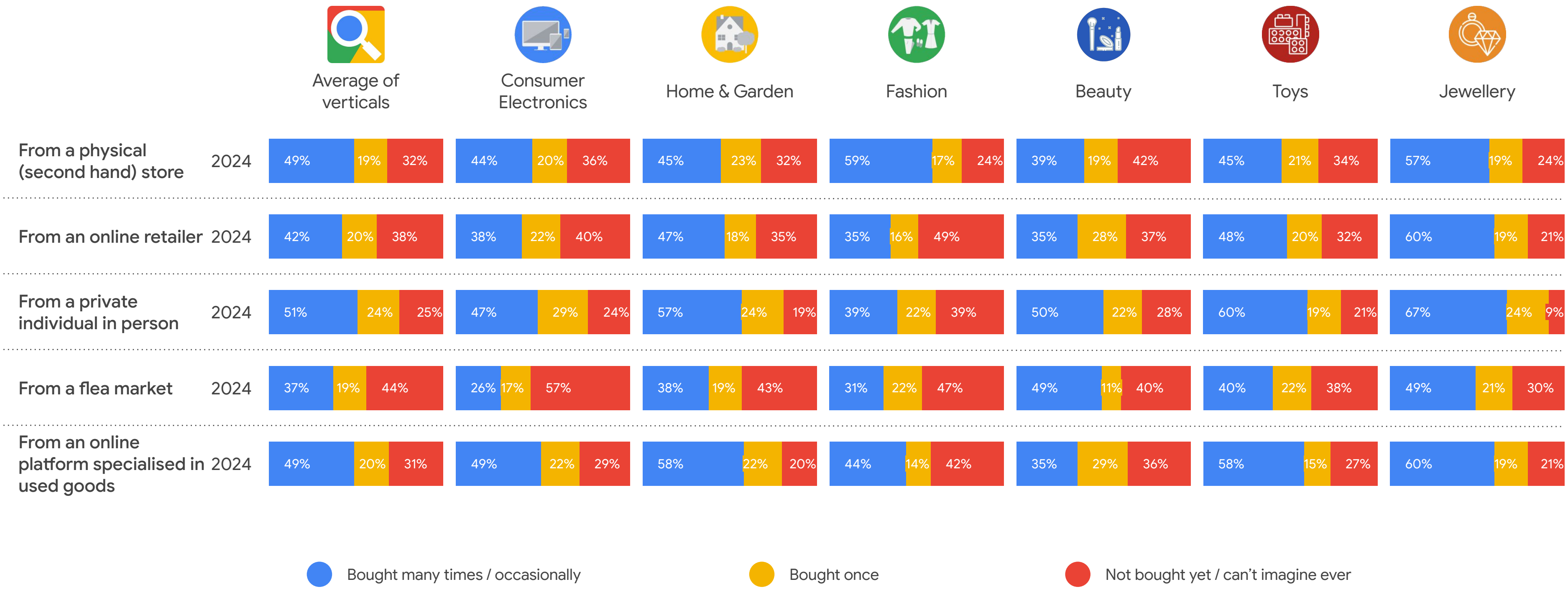
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024: Online buyers collecting purchased product(s) in store/ pickup location of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=478, CE n=71, Home n=81, Fashion n=81, Food n=86, Beauty n=78, Toys n=34, Jewellery n=48, Q2_C Why did you pick up the product in store or at a pick-up location after ordering online?

Share of respondents purchasing used goods in the past



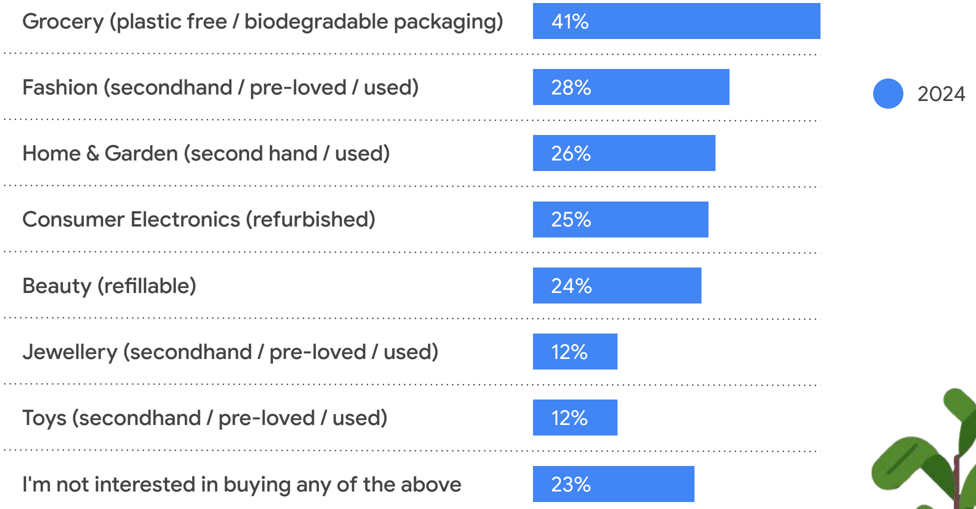
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Beauty, Toys, Jewellery n=1642/1614, CE n=231/207, Home n=266/257, Fashion n=416/431, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q100. Please think of all the products you have ever bought in this category. Have you ever bought used goods?

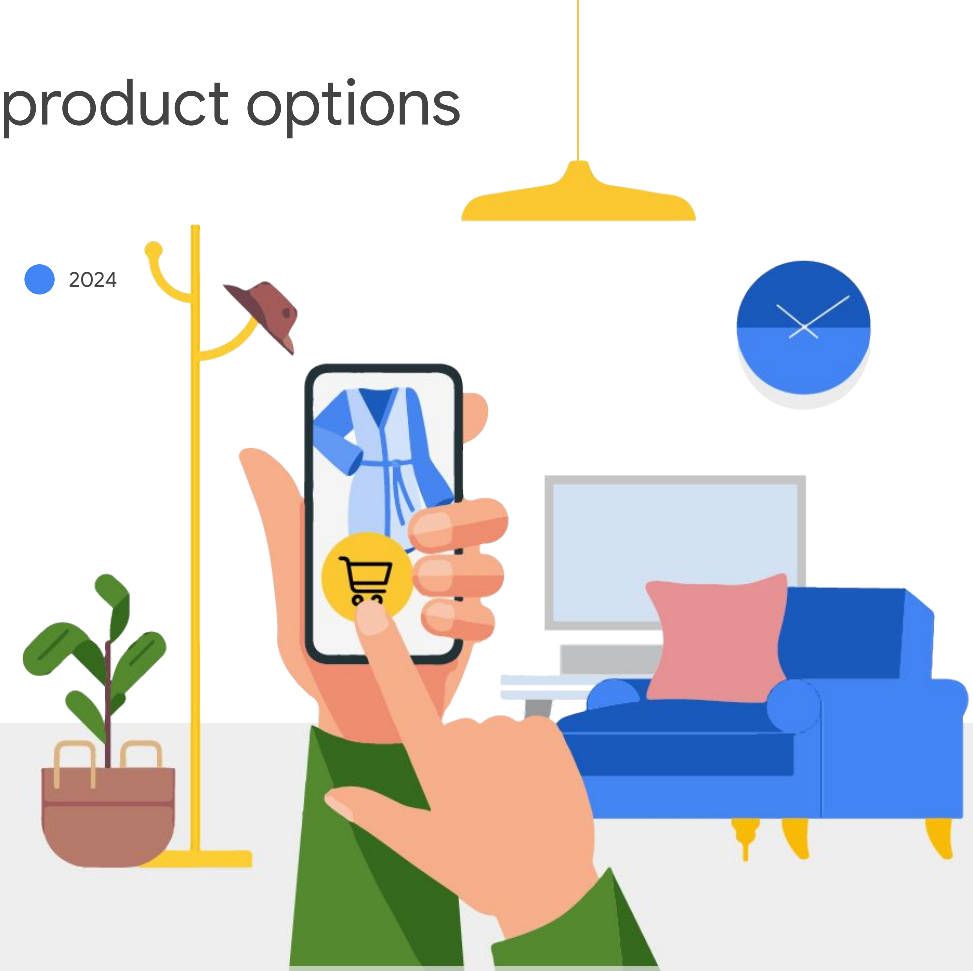
Location and frequency of purchasing used goods



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: Buyers of used goods of CE, Home, Fashion, Beauty, Toys, Jewellery n=416, CE n=75, Home n=74, Fashion n=114, Beauty n=64, Toys n=45, Jewellery n=44, Q101. Where and how often have you bought used goods?

Overall interest in sustainable product options





Note: Results show Average of verticals

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, Q101_A. Now, please don't refer to the product you bought last time but think in general: Which categories are you the most interested in buying more sustainable products?

Impact of cost of living

2023 | 2024 **Average of all Verticals**

		Somewhat agree	Completely agree	Top 2 Box
I am using more deals/discounts/offers when shopping because of rising inflation	2024	34%	34%	68%
	2023	32%	33%	65%
I'm making budgeting and financial savings a priority because of rising inflation	2024	37%	26%	63%
	2023	35%	25%	60%
I am buying cheaper products/brands because of rising inflation	2024	34%	23%	58%
	2023	31%	23%	54%
I am delaying big purchases because of rising inflation	2024	31%	21%	51%
	2023	29%	19%	48%
I am buying less products overall because of rising inflation	2024	29%	19%	47%
	2023	29%	17%	46%
I haven't changed my spending habits because of rising inflation	2024	21%	8%	29%
	2023	23%	9%	33%
I am buying used goods rather than new products because of rising inflation	2024	14%	8%	21%
	2023	13%	7%	20%

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.

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, Q104. To what extent do you agree or disagree with the following statements?

Chapter 2

Product Discovery & Research

- Channel usage during the shopping journey [link]
- First product awareness for last purchase [link]
- What comes first - retailer or brand? [link]
- Online research prior to purchase [link]
- Online touchpoints during product research [link]
- Google in the shopping journey [link]
- Google Trend insights [link]
- Retailtainment [link]
- Product browsing behavior [link]
- Length of product research: online vs. offline purchase [link]
- Length of product research: vertical split [link]
- Usage of new technologies in the shopping journey [link]

Channel usage during the shopping journey

2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
3+ Channels used	71%	85%	75%	60%	76%	68%	67%	68%
5+ Channels used	48%	58%	50%	36%	51%	48%	48%	50%

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

First product awareness for last purchase

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
First Awareness Online	37%	59%	48%	43%	26%	22%	33%	43%
First Awareness Through Offline Touch Points	36%	23%	33%	38%	45%	33%	39%	30%
First Awareness Through Previous Product Experience	12%	5%	5%	8%	17%	25%	6%	6%

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.

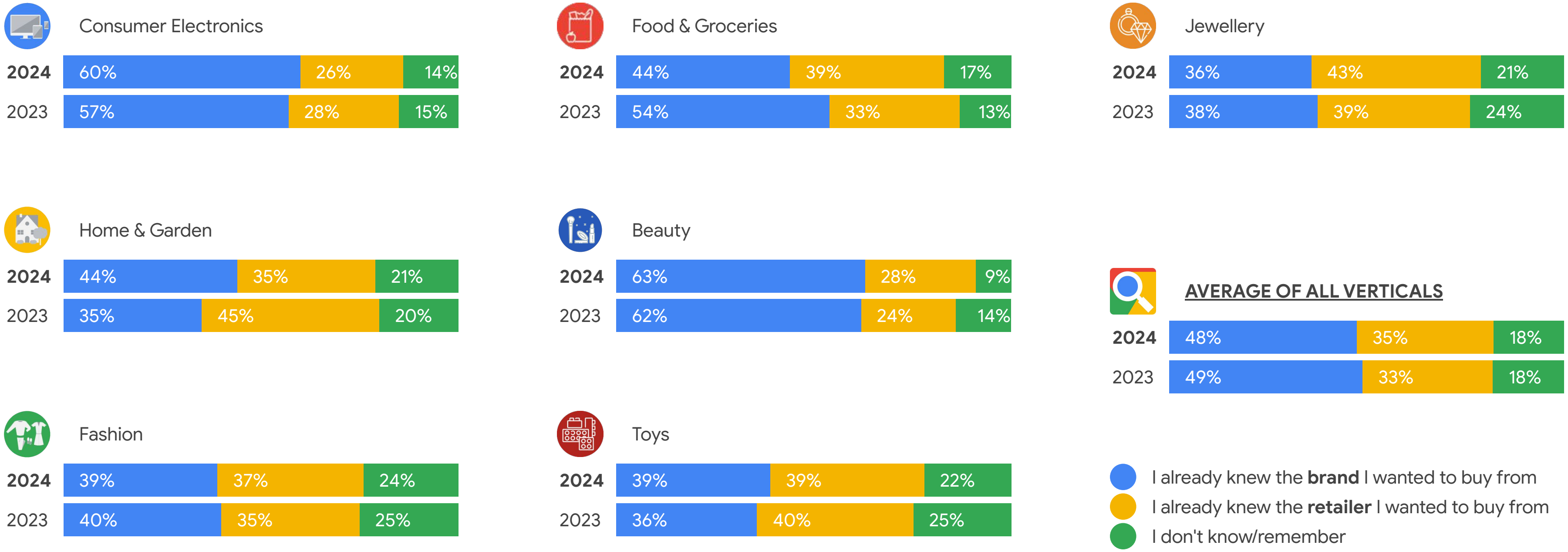
First Awareness Offline - respondents who claim that they first got aware of the product by a sales assistant recommendation or in a brochure/ catalog or newspaper/ magazine or saw the product in the store/ mall or on the radio or TV or recommendation from a friend or outdoor ad.

First Awareness Through Previous Experience - respondents who said that they bought the product before.

Online Offline 2024

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, CE n=231, Home n=266, Fashion n=416, Food n=472, Beauty n=421, Toys n=159, Jewellery n=150, Q7: How did you first become aware of the product you purchased?

What comes first - retailer or brand?



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, CE n=231/207, Home n=266/257, Fashion n=416/431, Food n=472/516, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q8: Which of the following statements best applies to you. When I started looking for the product I wanted to buy...

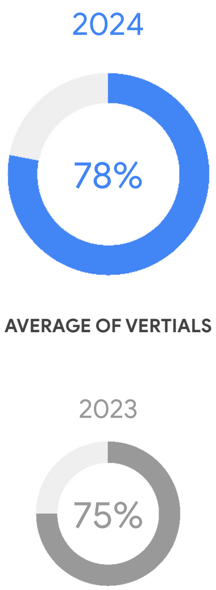
What comes first - retailer or brand?

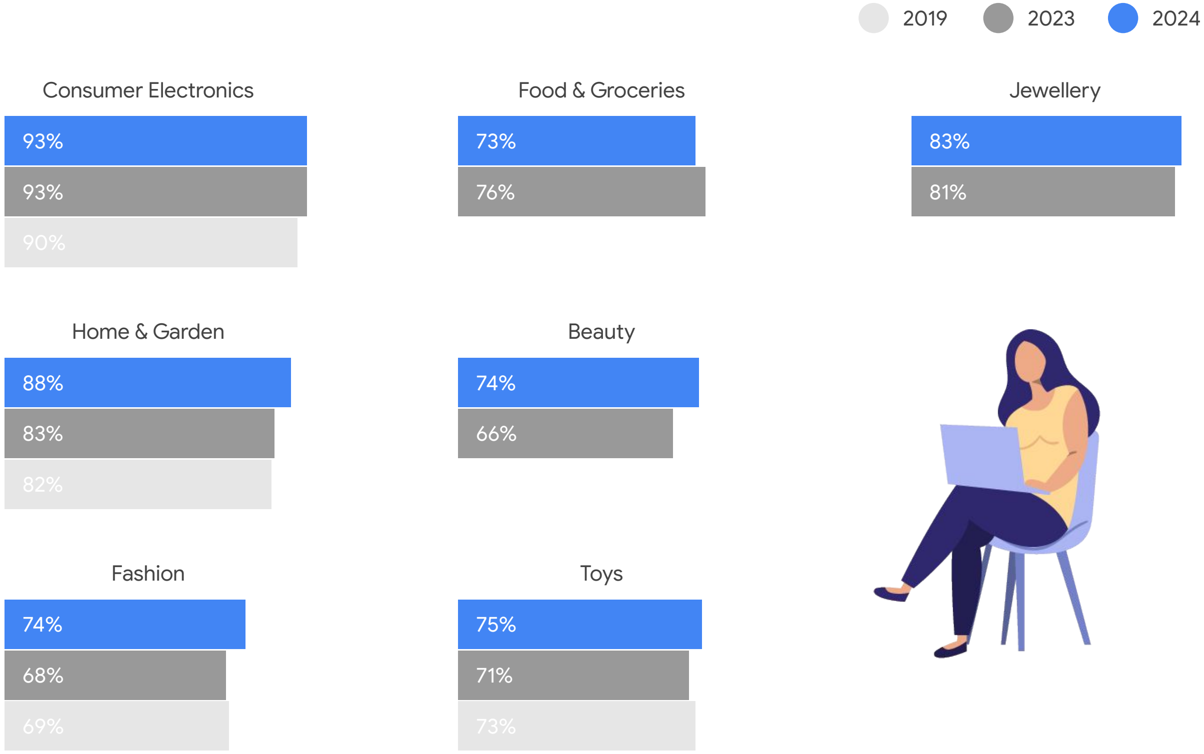
AVERAGE OF ALL VERTICALS

Note: 2024 results

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, 18-24 n=218/219, 25-34 n=408/411, 35-44 n=387/390, 45-54 n=425/428, 55+ n=676/682, Q8: Which of the following statements best applies to you. When I started looking for the product I wanted to buy...

Online research prior to purchase

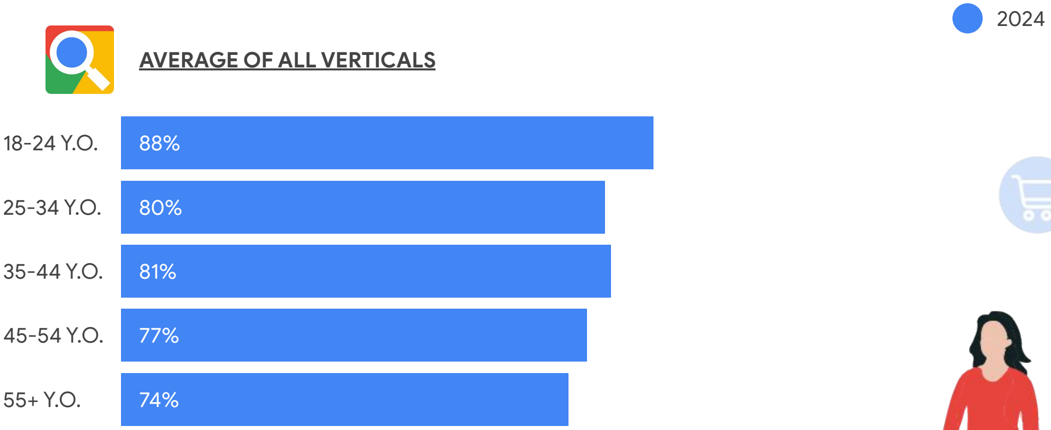


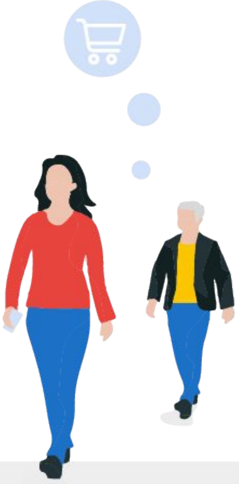


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130/1376, CE n=231/207/357, Home n=266/257/349, Fashion n=416/431/468, Food n=472/516/0, Beauty n=421/444/0, Toys n=159/136/202, Jewellery n=150/140/0, Q9: Where did you gather information online (on any device, via website, or app) regarding the product you bought, if at all?

Online research prior to purchase

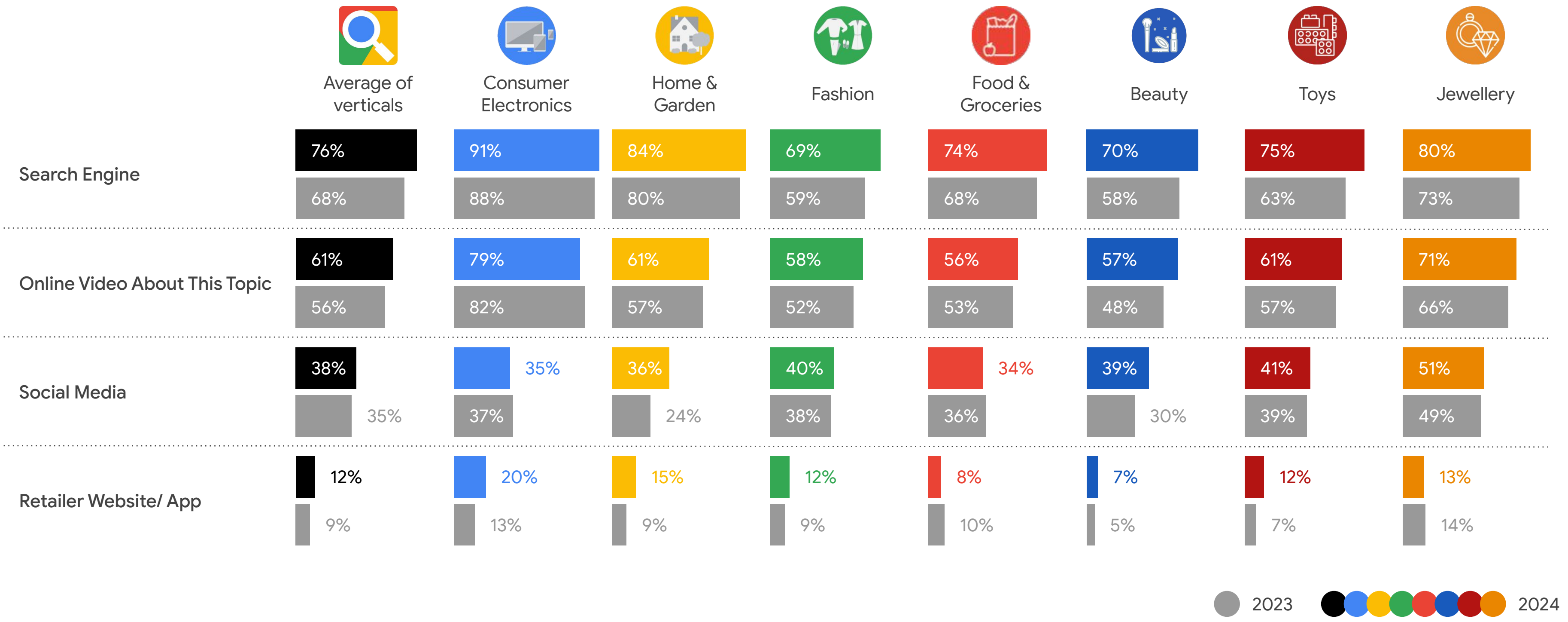
AVERAGE OF ALL VERTICALS





Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114, 18-24 n=218, 25-34 n=408, 35-44 n=387, 45-54 n=425, 55+ n=676, Q9: Where did you gather information online (on any device, via website, or app) regarding the product you bought, if at all?

Online touchpoints during product research

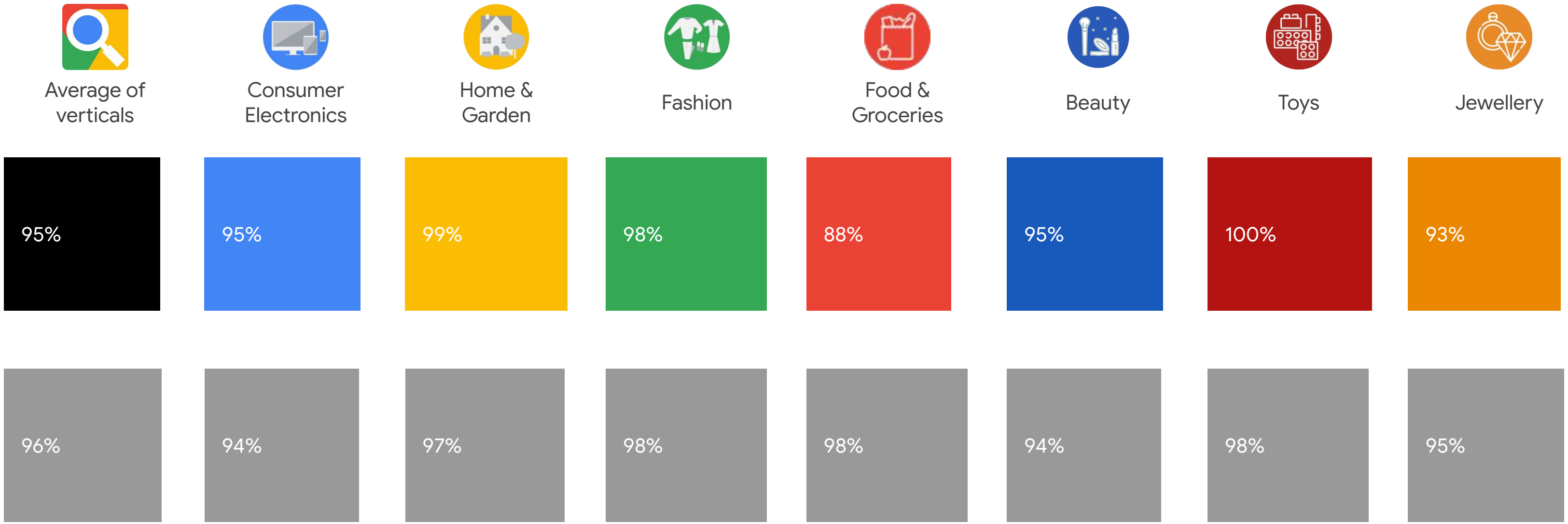


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, CE n=231/207, Home n=266/257, Fashion n=416/431, Food n=472/516, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q9_Q10_Q11: Where did you gather information - at any touchpoints and on any device - for your most recent purchase? *selected touchpoints

Google in the shopping journey

2023 2024

% of respondents who used Google as a search engine during their product research:



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=491/437, CE n=87/81, Home n=81/80, Fashion n=74/75, Food n=94/81, Beauty n=82/69, Toys n=37/27, Jewellery n=36/24,
Q9A. You mentioned you researched the product you purchased on a search engine. Which search engine(s) were you using?

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

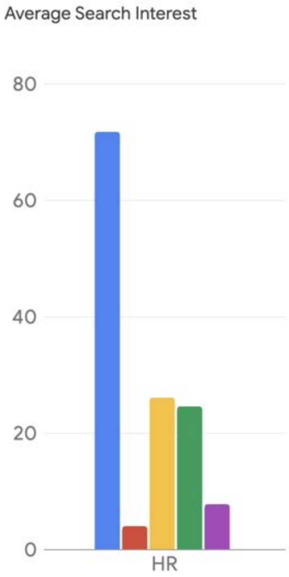
Examples:

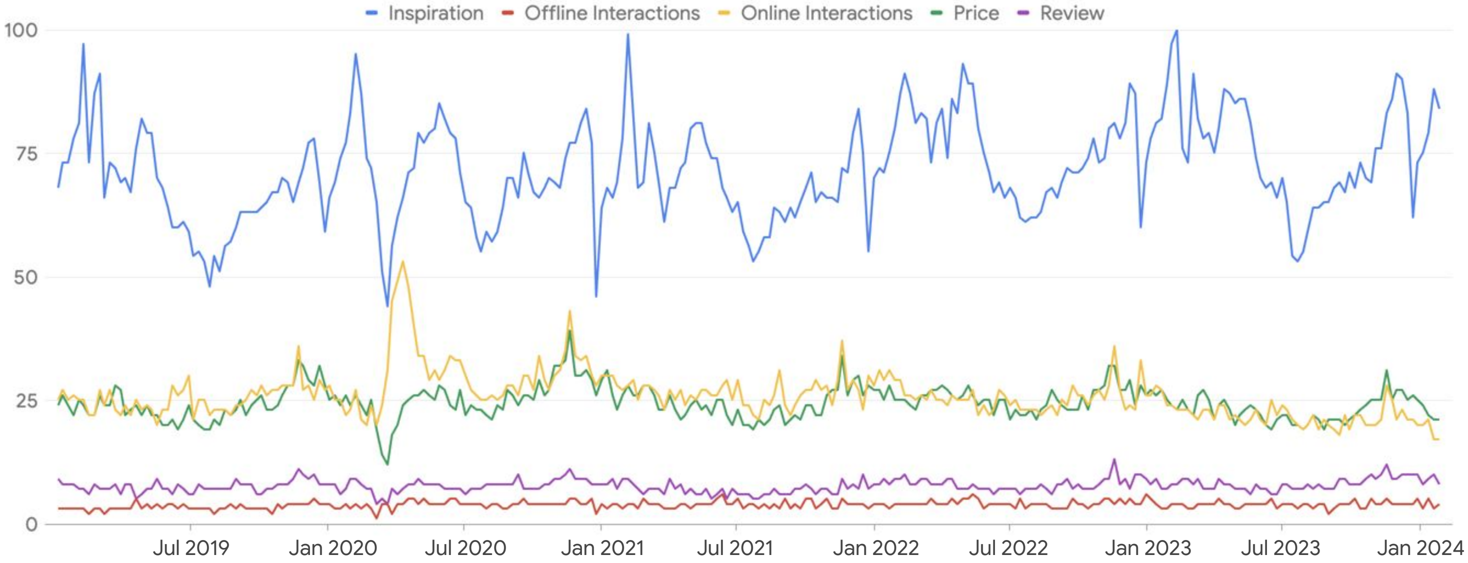
ideas

how to
cheap
Best
used

Source: More information on TwG, Searches are getting more specific. This can help you spot early intent, October 2022, Link

Search interest of popular modifiers in the shopping category





Source: Google Trends (Jan 2019 - Jan 2024) - translated modifiers (into local languages) have been used for each market. Shown in English here for simplicity reasons:

Retailtainment

Consumer Electronics

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	19%	21%	60%
2023	16%	22%	62%

Food & Groceries

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	20%	22%	58%
2023	21%	19%	60%

Jewellery

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	26%	23%	51%
2023	26%	21%	53%

Home & Garden

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	17%	21%	63%
2023	16%	19%	65%

Beauty

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	22%	18%	60%
2023	21%	18%	61%

AVERAGE OF ALL VERTICALS

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	21%	20%	58%
2023	21%	19%	60%

Fashion

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	23%	19%	58%
2023	22%	19%	59%

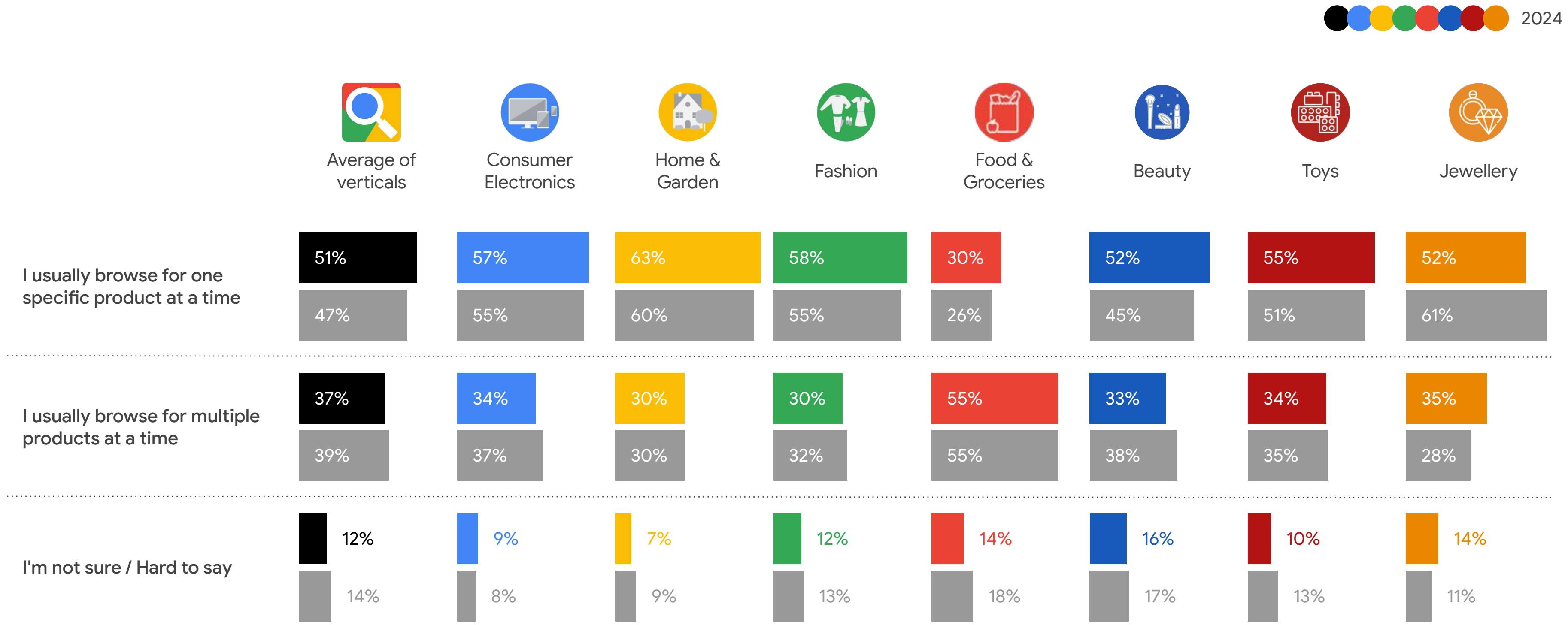
Toys

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	27%	21%	52%
2023	25%	22%	54%

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

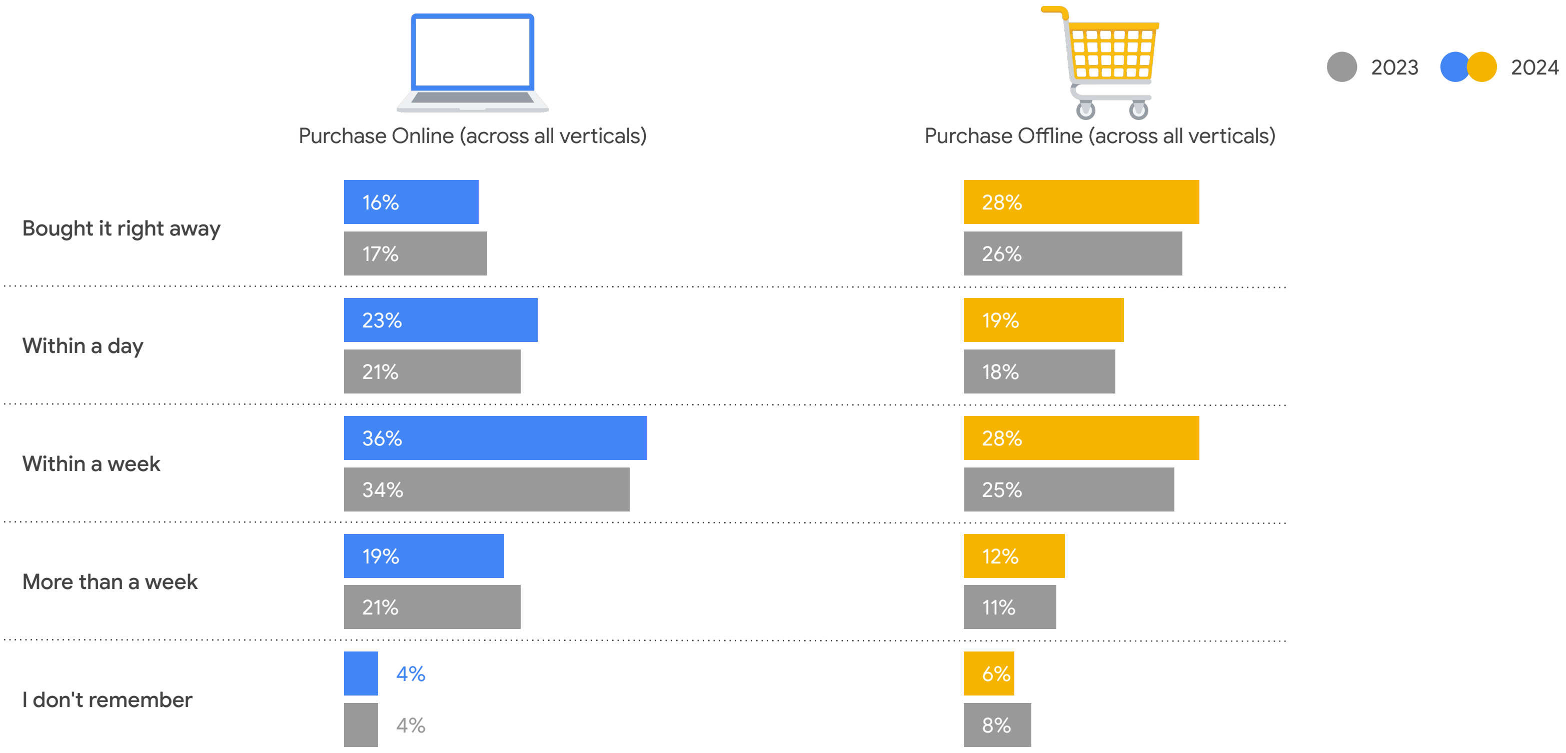
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, CE n=231/207, Home n=266/257, Fashion n=416/431, Food n=472/516, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q13_D. Thinking about when you're gathering inspiration about [INSERT CATEGORY] products to buy, in general, what proportion of your time do you spend doing the following?

Product browsing behavior



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, CE n=231/207, Home n=266/257, Fashion n=416/431, Food n=472/516, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q13_E. And thinking about when you're actively browsing for products that you plan to buy in [Insert Category], which best describes your approach?

Length of product research: online vs. offline purchase



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, Q13_C. What is the approximate total time that elapsed from when you first started researching the product and the moment when you purchased it?

Length of product research: vertical split

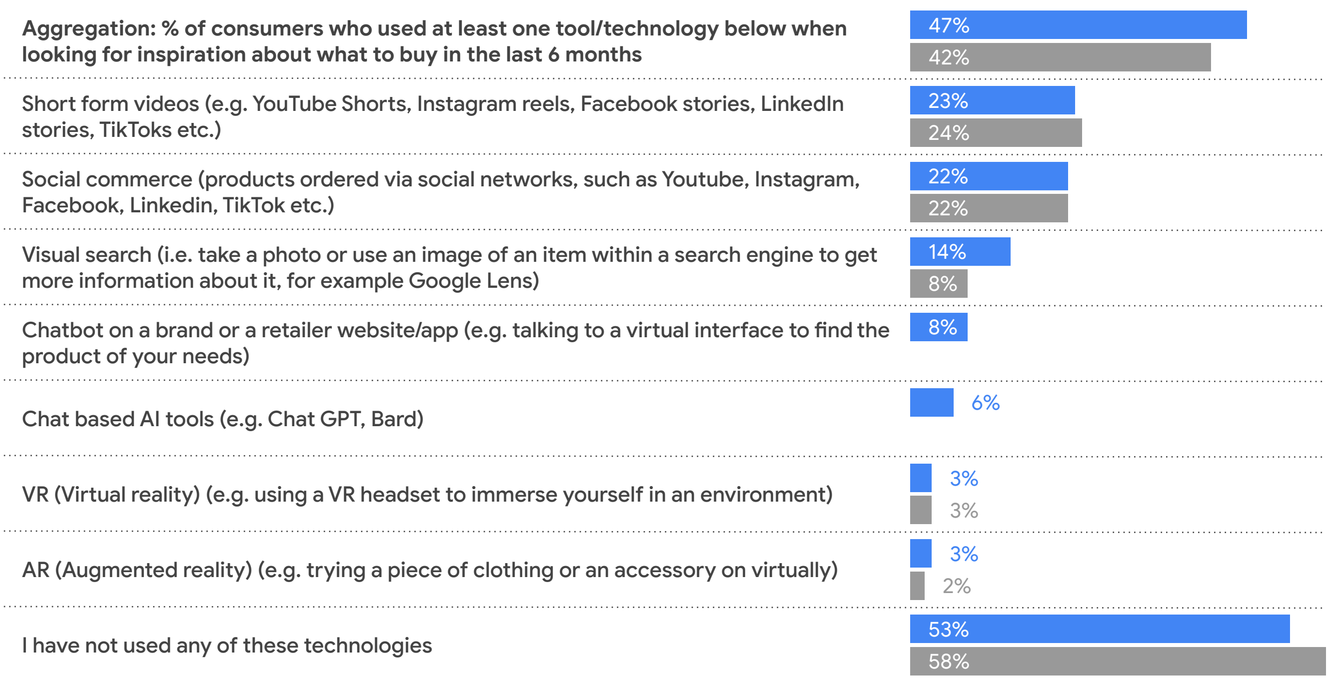
2023 | 2024

	Year	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Bought it right away	2024	22%	12%	14%	26%	22%	26%	29%	21%
	2023	22%	9%	15%	28%	20%	29%	27%	20%
Within a day	2024	21%	19%	15%	17%	30%	20%	24%	22%
	2023	19%	12%	19%	20%	25%	17%	19%	18%
Within a week	2024	32%	33%	38%	36%	26%	29%	30%	34%
	2023	29%	41%	38%	29%	23%	23%	30%	36%
More than a week	2024	15%	35%	29%	11%	6%	9%	13%	19%
	2023	16%	34%	23%	12%	9%	11%	14%	20%
I don't remember	2024	5%	1%	3%	4%	9%	9%	2%	3%
	2023	6%	2%	3%	4%	10%	8%	3%	4%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, CE n=231/207, Home n=266/257, Fashion n=416/431, Food n=472/516, Beauty n=421/444, Toys n=159/136, Jewellery n=150/140, Q13_C. What is the approximate total time that elapsed from when you first started researching the product and the moment when you purchased it?

Usage of new technologies in the shopping journey

Note: Results show Average of verticals



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130, Q103. Have you used any of the following tools/technologies when looking for inspiration about what to buy in the last 6 months?

Chapter 3
Mobile shopping

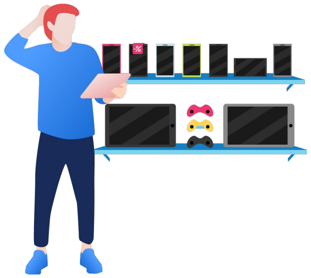
- Devices used for online purchase [link]
- Smartphone usage during product research [link]
- Smartphone usage during online shopping [link]
- Purchases via smartphones: websites vs. apps [link]
- Shopping app installations [link]
- Food & Groceries: delivery apps usage [link]

Devices used for online purchase

Note: Results show Average of verticals

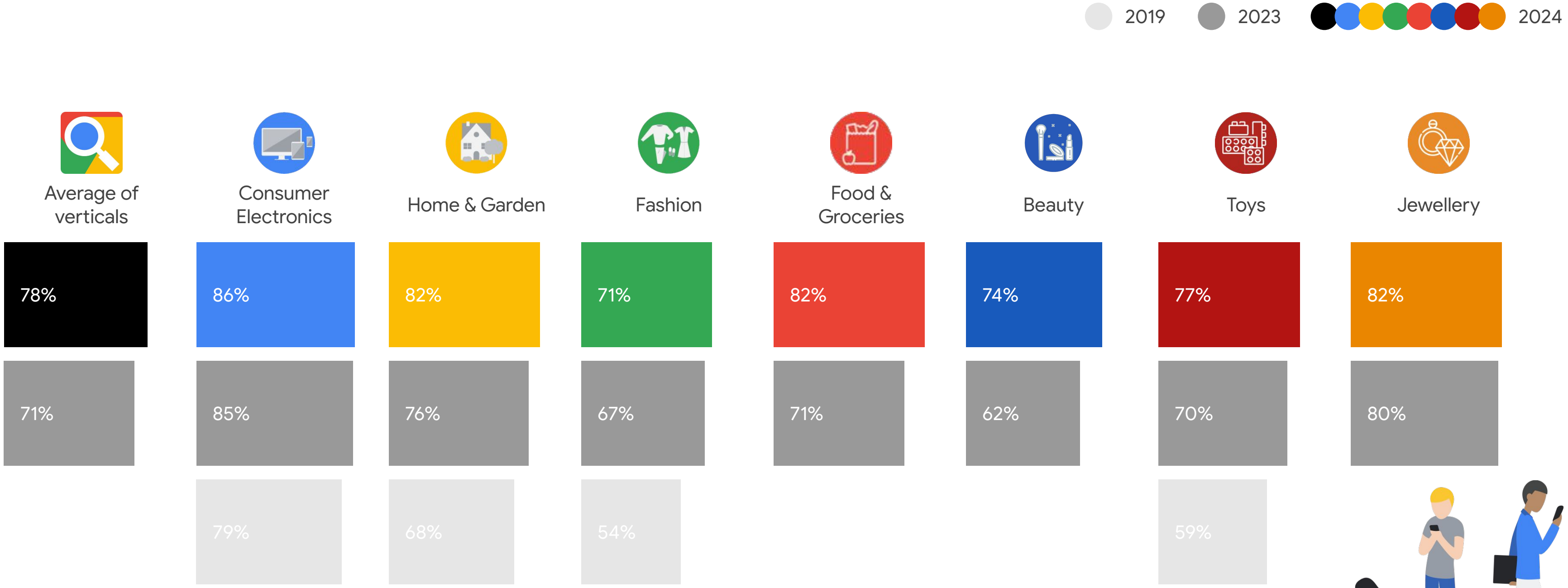
2024

	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%	63%	65%	56%	54%	33%
A laptop or desktop computer	35%	23%	25%	35%	32%	50%
A tablet	4%	3%	2%	2%	4%	5%
A smart speaker or voice assistant device	0%	0%	1%	0%	0%	0%



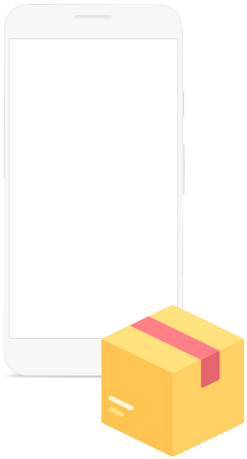
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1033, 18-24 n=117, 25-34 n=242, 35-44 n=188, 45-54 n=201, 55+ n=284, Q3. Which device did you use for your online purchase?

Smartphone usage during product research



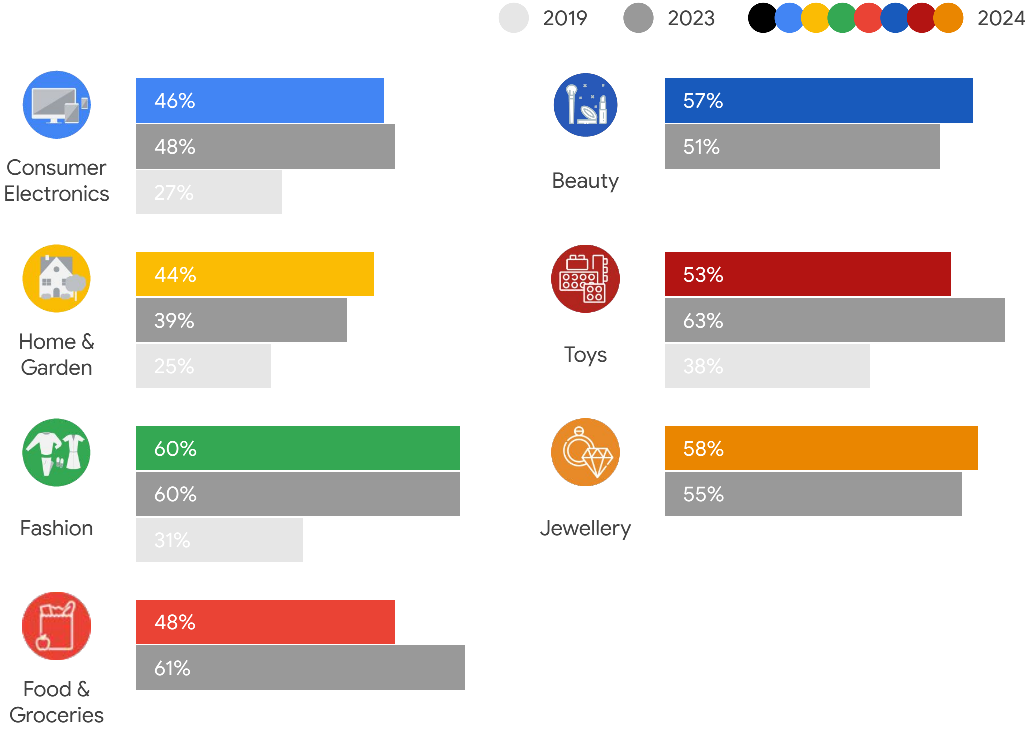
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2019: Respondents using smartphone for their product research, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1999/2031/1234, CE n=220/199/323, Home n=258/244/299, Fashion n=396/416/427, Food n=434/477/0, Beauty n=399/430/0, Toys n=152/129/184, Jewellery n=141/136/0, Q12: When you were looking for information, did you at any point use your smartphone to get hold of the information you needed?

Smartphone usage during online shopping



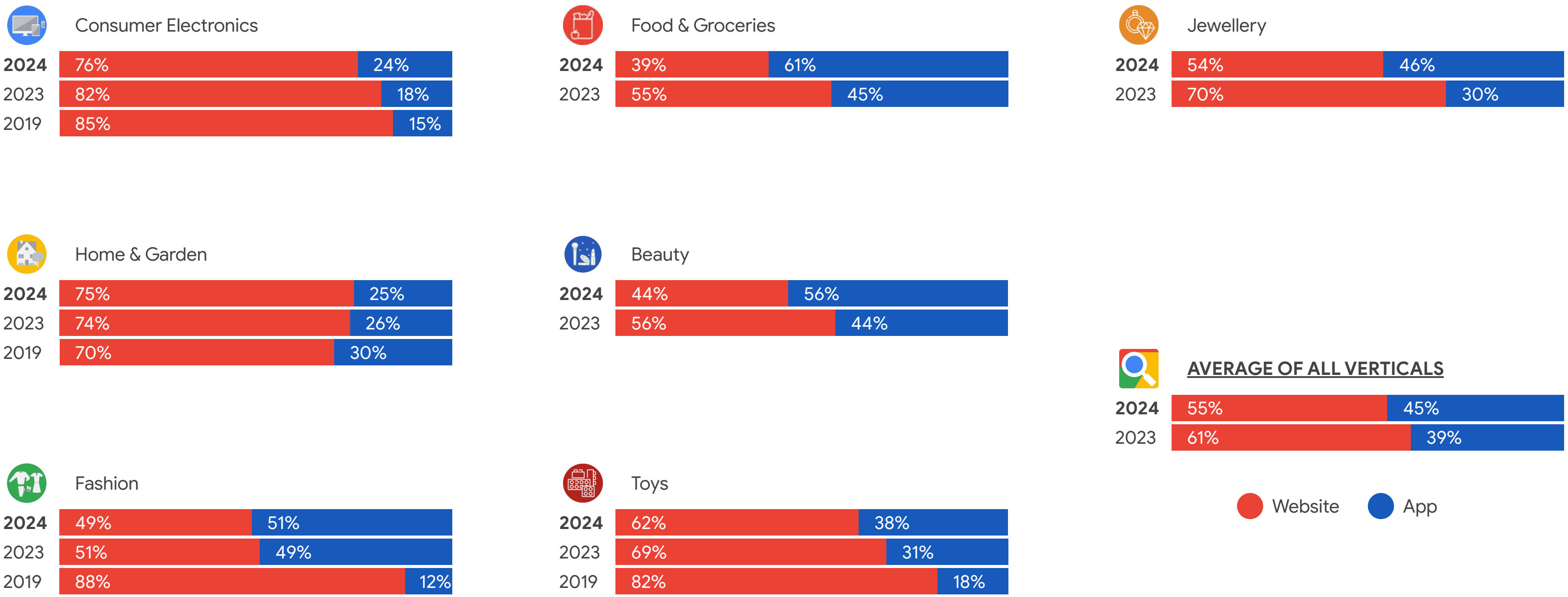
Average of verticals **52%**

use their smartphone when making an online purchase across all verticals



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023/2019: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1033/945/263, CE n=154/126/107, Home n=150/127/51, Fashion n=205/226/68, Food n=195/167/0, Beauty n=164/164/0, Toys n=67/56/37, Jewellery n=98/78/0, Q3: Which device did use you for your online purchase?

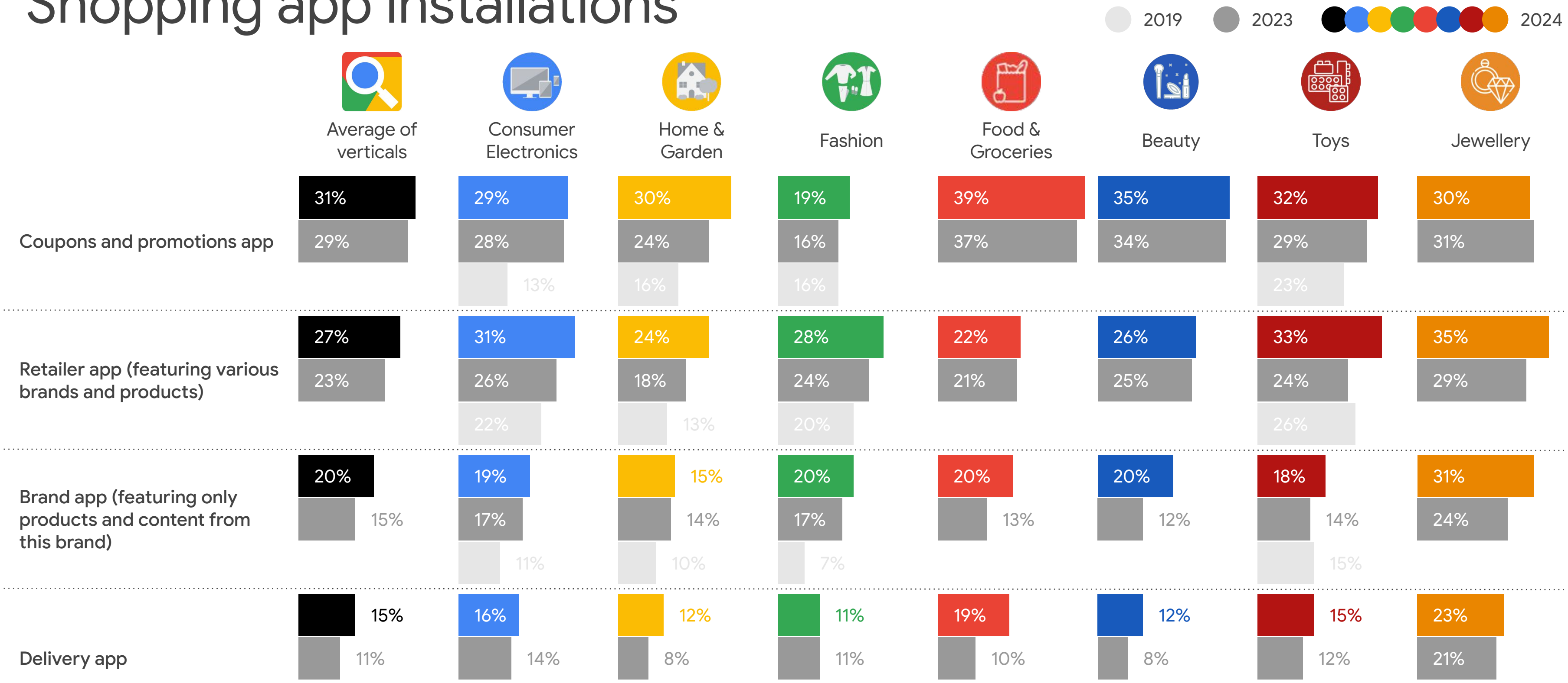
Purchases via smartphones: websites vs. apps



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

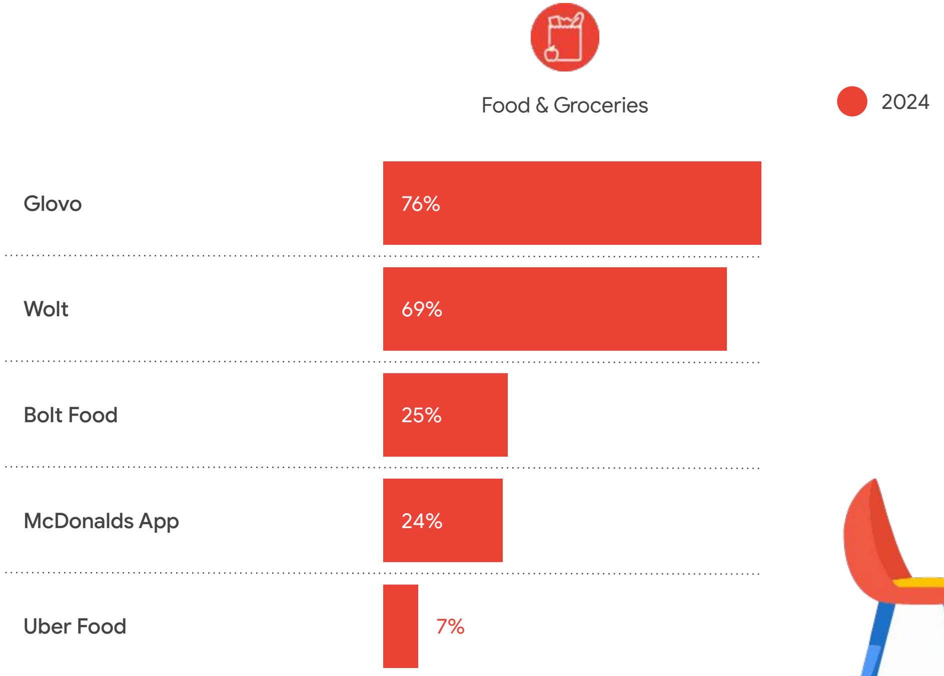
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2019: Online buyers purchasing via smartphone, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=511/481/70, CE n=69/56/26, Home n=64/47/10, Fashion n=118/134/21, Food n=83/90/0, Beauty n=87/78/0, Toys n=34/35/13, Jewellery n=55/41/0, Q3_B: And how did you buy via your smartphone?

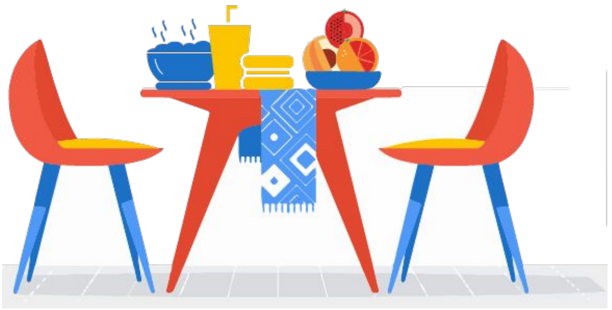
Shopping app installations



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024/2023/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2114/2130/1234, CE n=231/207/323, Home n=266/257/299, Fashion n=416/431/427, Food n=472/516/0, Beauty n=421/444/0, Toys n=159/136/184, Jewellery n=150/140/0, Q20: Which of these shopping apps have you installed on your smartphone, if any?

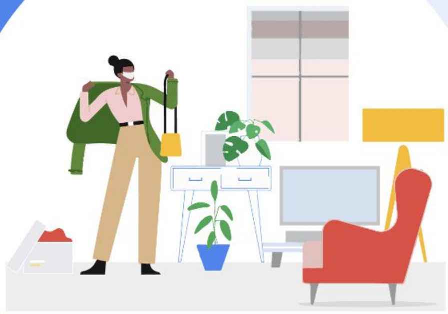
Food & Groceries: delivery apps usage





Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Croatia. 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/Beauty.
Base 2024: All respondents that have delivery apps installed, buyers of Food n=90, Food n=90, Q20_B: Did you use any of the following delivery apps?

Google Market Insights



Smart Shopper 2024