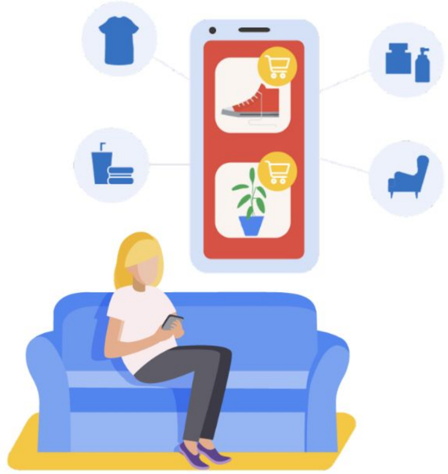
Google Market Insights

Smart Shopper 2024

Finland 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 = 2106, 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

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

39% vs. 61%
Online vs. offline purchase split

66%
Channel agnostic buyers who are not fully set on one channel

38%
Research online and purchase offline

45%
Experienced online pain points during their shopping journey

50% vs. 34% *(not adding up to 100%)*
Retailer vs. brand - what comes first?

58%
Do online research

51%
Used a search engine prior to their last purchase

96%
Used Google as a search engine for product research

32%
Used new tools/technologies when looking for inspiration about what to buy in the last 6 months

16%
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: FI. 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

Year	Online	Offline	Change
2024	60%	40%	-4
2023	64%	36%	+11
2022	53%	47%	+10
2021	43%	57%	+1
2019	42%	58%	

Food & Groceries

Year	Online	Offline	Change
2024	26%	74%	+/-0
2023	26%	74%	+9
2022	17%	83%	

Jewellery

Year	Online	Offline	Change
2024	69%	31%	-2
2023	71%	29%	+8
2022	63%	37%	

Home & Garden

Year	Online	Offline	Change
2024	47%	53%	-4
2023	51%	49%	+12
2022	39%	61%	+4
2021	35%	65%	+12
2019	23%	77%	

Beauty

Year	Online	Offline	Change
2024	31%	69%	-1
2023	32%	68%	+7
2022	25%	75%	+8
2021	17%	83%	+7
2019	10%	90%	

AVERAGE OF ALL VERTICALS

Year	Online	Offline	Change
2024	39%	61%	-2
2023	41%	59%	

Fashion

Year	Online	Offline	Change
2024	48%	52%	-1
2023	49%	51%	+5
2022	44%	56%	+7
2021	37%	63%	+11
2019	26%	74%	

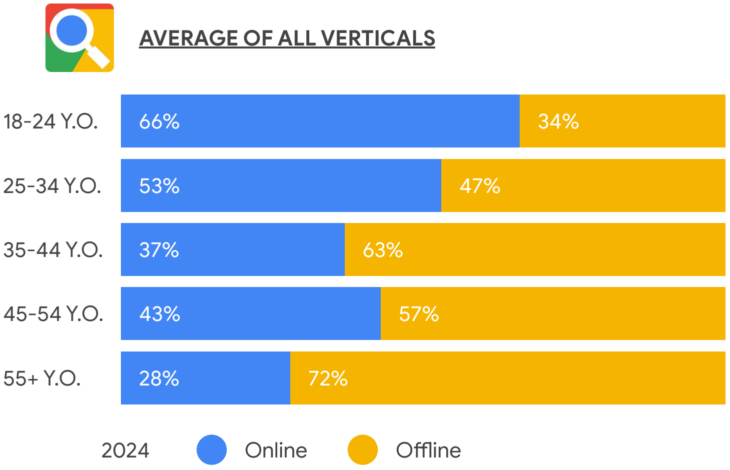
Toys

Year	Online	Offline	Change
2024	33%	67%	-5
2023	38%	62%	+4
2022	34%	66%	+7
2021	27%	73%	+10
2019	17%	83%	

Online Offline

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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 2024/2023/2022/2021/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2106/2106/2201/1621/2078, CE n=187/175/217/215/345, Home n=227/218/277/268/350, Fashion n=412/423/453/495/599, Food n=604/657/532/0/0, Beauty n=425/414/425/507/619, Toys n=136/103/129/136/165, Jewellery n=116/116/169/0/0, 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: Finland. 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=2106, 18-24 n=217, 25-34 n=332, 35-44 n=335, 45-54 n=326, 55+ n=896, 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	19%	29%	2%
Offline purchase	18%	18%	13%

2024, Average across all verticals

	Online research only	**Online and offline research**	**Offline research only**
Online purchase	22%	23%	3%
Offline purchase	20%	18%	13%

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: Finland. 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=1450/1364, 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	18%	7%	75%
2023	22%	8%	70%
2022	19%	12%	69%
2021	24%	6%	70%
2019	15%	19%	66%

Food & Groceries

Year	Online	Offline	Agnostic
2024	3%	48%	50%
2023	3%	46%	51%
2022	5%	54%	42%

Jewellery

Year	Online	Offline	Agnostic
2024	12%	10%	78%
2023	14%	10%	77%
2022	15%	9%	75%

Home & Garden

Year	Online	Offline	Agnostic
2024	9%	12%	79%
2023	8%	14%	78%
2022	5%	19%	75%
2021	15%	14%	71%
2019	5%	35%	60%

Beauty

Year	Online	Offline	Agnostic
2024	5%	31%	64%
2023	7%	31%	63%
2022	7%	32%	61%
2021	10%	34%	56%
2019	6%	53%	41%

AVERAGE OF ALL VERTICALS

Year	Online	Offline	Agnostic
2024	7%	26%	66%
2023	8%	27%	65%

Fashion

Year	Online	Offline	Agnostic
2024	10%	17%	72%
2023	12%	16%	72%
2022	15%	25%	60%
2021	14%	18%	68%
2019	12%	31%	57%

Toys

Year	Online	Offline	Agnostic
2024	7%	9%	84%
2023	7%	12%	80%
2022	7%	12%	81%
2021	9%	14%	77%
2019	7%	21%	72%

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: Finland. 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 2024/2023/2022/2021/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2106/2106/2201/1473/2078, CE n=187/175/217/188/345, Home n=227/218/277/236/350, Fashion n=412/423/453/451/599, Food n=604/657/532/0/0, Beauty n=425/414/425/475/619, Toys n=136/103/129/123/165, Jewellery n=116/116/169/0/0, Q18. How frequently do you buy this category online, if at all?

Change of buying behaviour since 2020 covid pandemic

Consumer Electronics

Year	Online	Offline	Change
2024	69%	31%	-5
2023	74%	26%	+4
2022	70%	30%	-5
2021	75%	25%	

Food & Groceries

Year	Online	Offline	Change
2024	39%	61%	-5
2023	44%	56%	-3
2022	47%	53%	

Jewellery

Year	Online	Offline	Change
2024	71%	29%	+2
2023	69%	31%	-5
2022	74%	26%	

Home & Garden

Year	Online	Offline	Change
2024	62%	38%	-4
2023	66%	34%	+3
2022	63%	37%	-10
2021	73%	27%	

Beauty

Year	Online	Offline	Change
2024	55%	45%	-7
2023	62%	38%	-5
2022	67%	33%	-11
2021	78%	22%	

Fashion

Year	Online	Offline	Change
2024	69%	31%	+7
2023	62%	38%	-4
2022	66%	34%	-10
2021	76%	24%	

Toys

Year	Online	Offline	Change
2024	57%	43%	-10
2023	67%	33%	-1
2022	68%	32%	-5
2021	73%	27%	

AVERAGE OF ALL VERTICALS

Year	Online	Offline	Change
2024	60%	40%	-2
2023	62%	38%	

- Significantly/tend to buy more **online**
- Significantly/tend to buy more **offline**

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: Finland. 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 2024/2023/2022/2021: Frequent online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=735/791/863/643, CE n=84/95/114/104, Home n=89/104/128/129, Fashion n=170/169/166/205, Food n=121/146/125/0, Beauty n=140/150/147/141, Toys n=58/53/69/64, Jewellery n=73/74/114/0, 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
Needed something for the current season	25% 20% 45%		14% 6% 20%	33% 34% 67%		23% 16% 39%		25% 10% 36%
Needed to replace an item	18% 20% 38%	24% 44% 68%	22% 46% 68%	24% 26% 50%	12% 6% 18%	20% 17% 37%	[illegible] 8%	22% 10% 32%
Promotion	22% 13% 35%	24% 18% 43%	28% 15% 43%	21% 20% 41%	21% 8% 29%	20% 10% 30%	19% 10% 30%	21% 14% 35%
Regular refill	17% 16% 33%				16% 13% 30%	18% 21% 39%		
Wanted something up-to-date or new	23% 8% 31%	28% 12% 40%	25% 13% 38%	32% 15% 47%	16% [illegible] 17%	14% 5% 19%	31% 9% 40%	41% 14% 55%
Came across it spontaneously	21% 10% 31%	18% 7% 24%	21% 9% 31%	21% 18% 39%	20% [illegible] 24%	17% 9% 26%	29% 21% 50%	28% 22% 50%
Wanted a personal reward	20% 6% 26%	22% 7% 30%	15% 4% 20%	17% 8% 25%	25% 5% 30%	13% 5% 18%	15% 5% 20%	31% 17% 48%
Needed something for a special occasion	17% 8% 25%			13% 5% 18%				30% 18% 48%
I was curious and wanted to test the product	17% 6% 23%	21% 6% 28%	17% 3% 20%	15% 6% 22%	16% [illegible] 19%	15% 7% 23%	20% 5% 25%	27% 15% 42%
Talked about a related topic with someone	15% 7% 22%	21% 12% 33%	18% 11% 29%	16% 7% 23%	[illegible] 12%	[illegible] 14%	29% 16% 45%	21% 15% 35%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106, CE n=187, Home n=226, Fashion n=412, Food n=604, Beauty n=425, Toys n=136, Jewellery n=116, 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	36%	34%	70%
All relevant information conveniently accessible	39%	31%	70%
Products are always available regardless of season	35%	29%	64%
Easier to find new products	36%	28%	64%
Easier to make a choice	38%	26%	64%
Always latest product information available	36%	24%	60%
It's more convenient than offline	32%	27%	59%
It was cheaper online (promotion or lower prices)	33%	25%	58%
It best fits my lifestyle	30%	27%	57%
It's faster than offline	27%	26%	53%

Top 10 offline purchase drivers

	Somewhat agree	Completely agree	Top 2 Box
I can take the product home with me directly	18%	72%	90%
I can see, feel, or try the product more easily	26%	52%	78%
It's faster than online	24%	54%	77%
Product is offered from a local retailer or brand	25%	51%	75%
Easier to make a choice	30%	41%	71%
All relevant information conveniently accessible	31%	33%	64%
Easier to find a specific product	28%	33%	61%
It best fits my lifestyle	23%	35%	58%
Can get advice from staff	28%	26%	54%
It's more fun than online	24%	26%	50%

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: Finland. 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=2106, Online n=831, Offline n=1275, 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	44%	39%	83%
They offer a good range of products	51%	31%	83%
I trust this retailer	46%	36%	82%
They had the product I wanted in stock	43%	38%	81%
They are local to me (the store is located near me)	42%	39%	81%
They offer high quality products	48%	30%	79%
Positive past experience with this retailer	47%	28%	75%
They offer a good in-store shopping experience	50%	19%	69%
They offer a good online shopping experience	46%	23%	69%
Good customer service	45%	24%	68%
They have a clear return policy	41%	26%	68%
They offer free returns	35%	28%	63%
They provide products for everyone	45%	18%	63%

	Quite important	Very important	Top 2 Box
They offer products for people like me	44%	17%	61%
When I bought the product, the retailer was offering a good deal/promotion	37%	21%	58%
They offer free delivery	35%	22%	57%
They offer the fastest delivery	38%	17%	55%
I can return a product to this retailer at a location nearby	28%	20%	49%
They provide good personalised recommendations about products I might like	36%	12%	48%
I already have an account in this retailer's website with all my data and preferences saved	28%	18%	45%
Retailer's ethical practices	29%	11%	40%
They offer a great connection between online and in-store services	27%	11%	38%
Retailer's commitment to environmental change	29%	9%	37%
They offer a range of different payment options	18%	9%	27%
Their adverts include a range of people who look like me	7%	3%	11%

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: Finland. 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=2105, Q1_X. How important was each of the below factors when you selected this retailer to buy the product in the category?

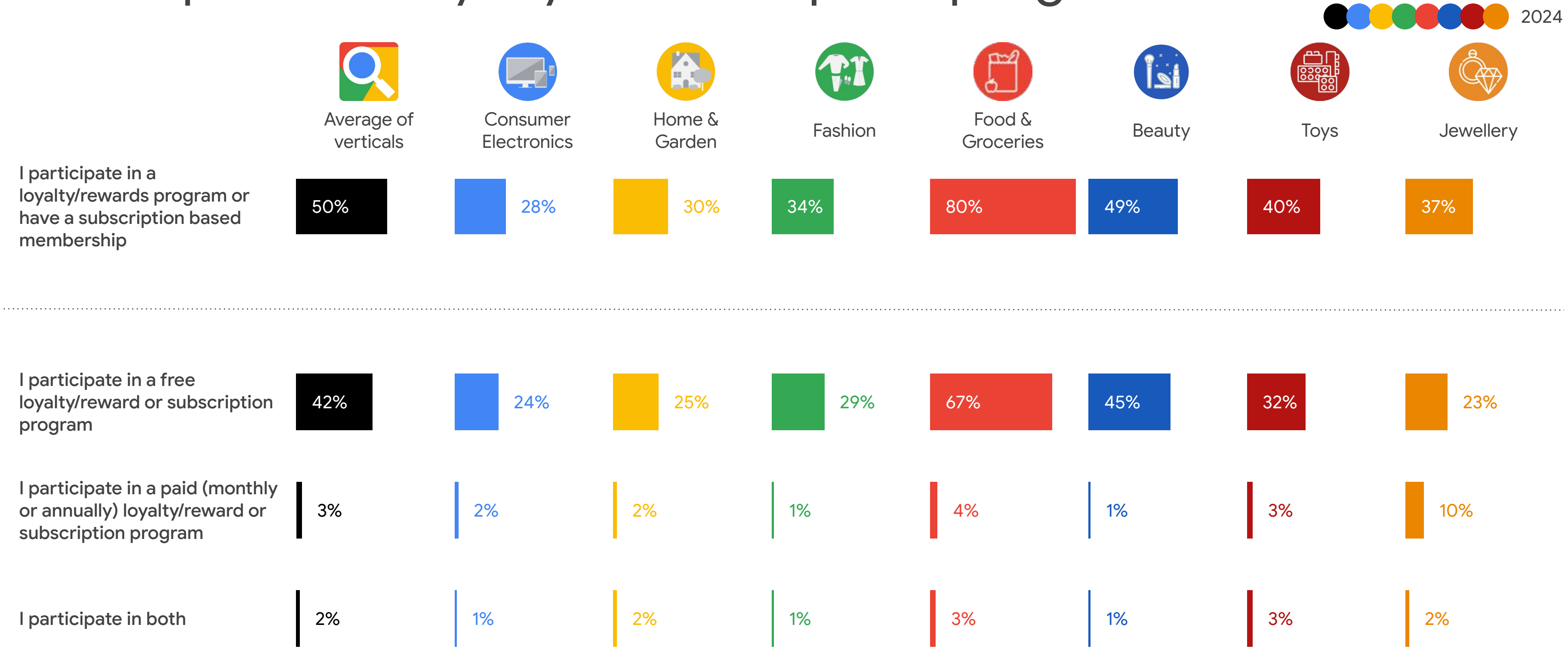
Relationship with the retailer for the last purchase

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I purchase all products in this category from here, if possible (2024)	36%	29%	21%	26%	54%	39%	26%	25%
I purchase all products in this category from here, if possible (2023)	38%	29%	27%	24%	53%	42%	31%	22%
It is one of a few retailers I buy from (2024)	38%	44%	46%	38%	34%	38%	40%	37%
It is one of a few retailers I buy from (2023)	36%	47%	39%	36%	34%	34%	37%	35%
I use it only when I don't have an alternative (2024)	10%	9%	12%	11%	8%	10%	10%	12%
I use it only when I don't have an alternative (2023)	10%	6%	11%	14%	6%	11%	12%	12%
It was the first time I bought from this retailer (2024)	8%	10%	15%	15%	0%	5%	12%	23%
It was the first time I bought from this retailer (2023)	8%	10%	14%	14%	1%	5%	11%	25%
Aggregation: Use one or only few retailers (2024)	75%	73%	66%	63%	89%	77%	67%	62%
Aggregation: Use one or only few retailers (2023)	74%	76%	66%	60%	86%	76%	68%	57%

2023 2024

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106/2106, CE n=187/175, Home n=227/218, Fashion n=412/423, Food n=604/657, Beauty n=425/414, Toys n=136/103, Jewellery n=116/116, Q1_C: Which of the following statements best describes your relationship with the retailer where you bought?

Participation in loyalty & subscription programs



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106, CE n=187, Home n=227, Fashion n=412, Food n=604, Beauty n=425, Toys n=136, Jewellery n=116,
(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?

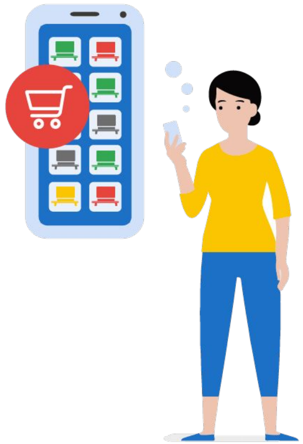
Importance of loyalty & subscription programs

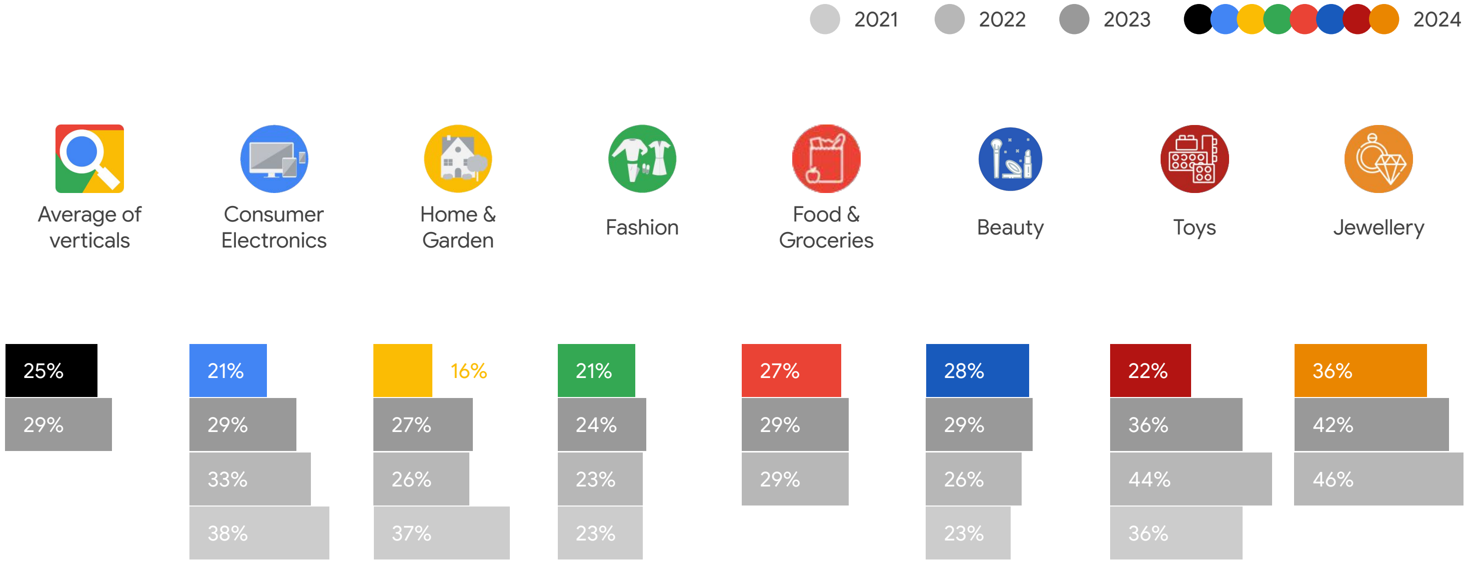
2024

		Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Free loyalty/reward or subscription program	Very important/ important to me	62%	53%	58%	49%	65%	64%	70%	64%
	Top 3 Reasons for participation	Discounts 87%	Discounts 77%	Discounts 80%	Discounts 88%	Discounts 89%	Discounts 88%	Discounts 80%	Discounts 70%
		Free delivery 17%	Small gifts 35%	Free delivery 26%	Free delivery 24%	Small gifts 14%	Free delivery 17%	Free returns 25%	Free delivery 38%
		Small gifts 17%	Exclusive products 29%	Exclusive products 23%	Free returns 19%	Free delivery 11%	Small gifts 17%	Free delivery 24%	Small gifts 36%
Paid loyalty/reward or subscription program	Very important/ important to me	49%	13%	68%	67%	40%	69%	47%	59%
	Top 3 Reasons for participation	Discounts 58%	Free delivery 100%	Discounts 54%	Discounts 79%	Discounts 75%	Discounts 65%	Fast delivery 82%	Small gifts 42%
		Free delivery 26%	Free returns 100%	Receive information earlier 53%	Free delivery 73%	Free delivery 11%	Free returns 37%	Free returns 54%	Fast delivery 40%
		Free returns 25%	Fast delivery 0%	Free returns 41%	Free returns 27%	Exclusive products 7%	Exclusive products 30%	Receive information earlier 40%	Discounts 36%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=982, CE n=50, Home n=66, Fashion n=125, Food n=449, Beauty n=200, Toys n=52, Jewellery n=40,
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

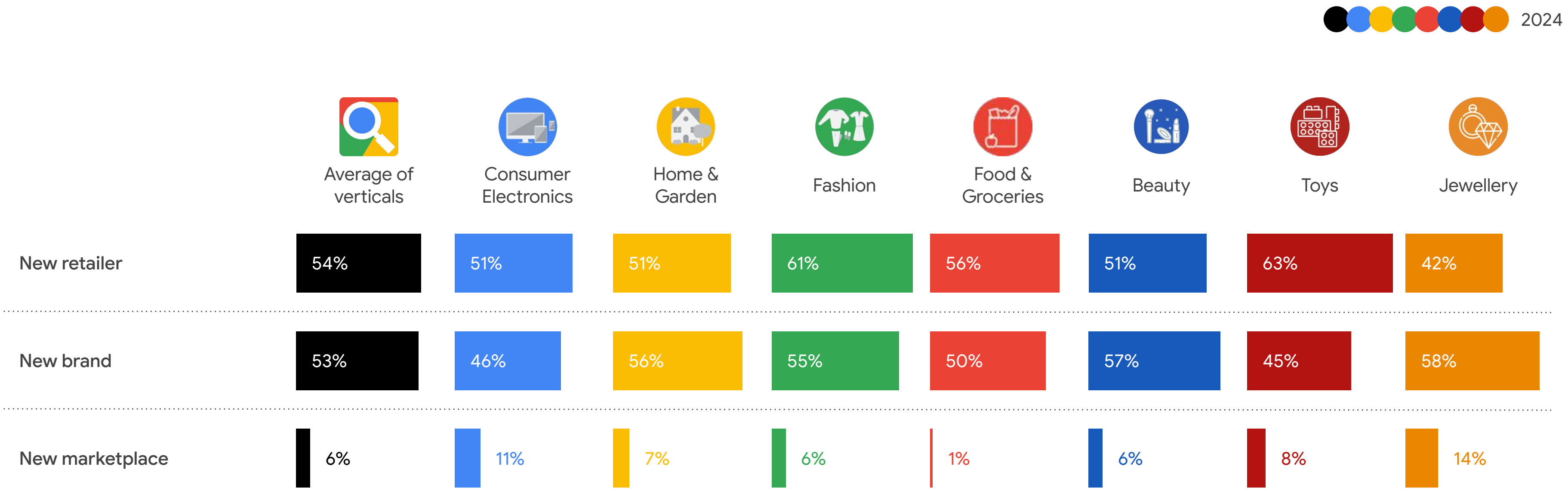




Note: Purchases made in the last 4 weeks from a retailer, a platform or brand never shopped with before

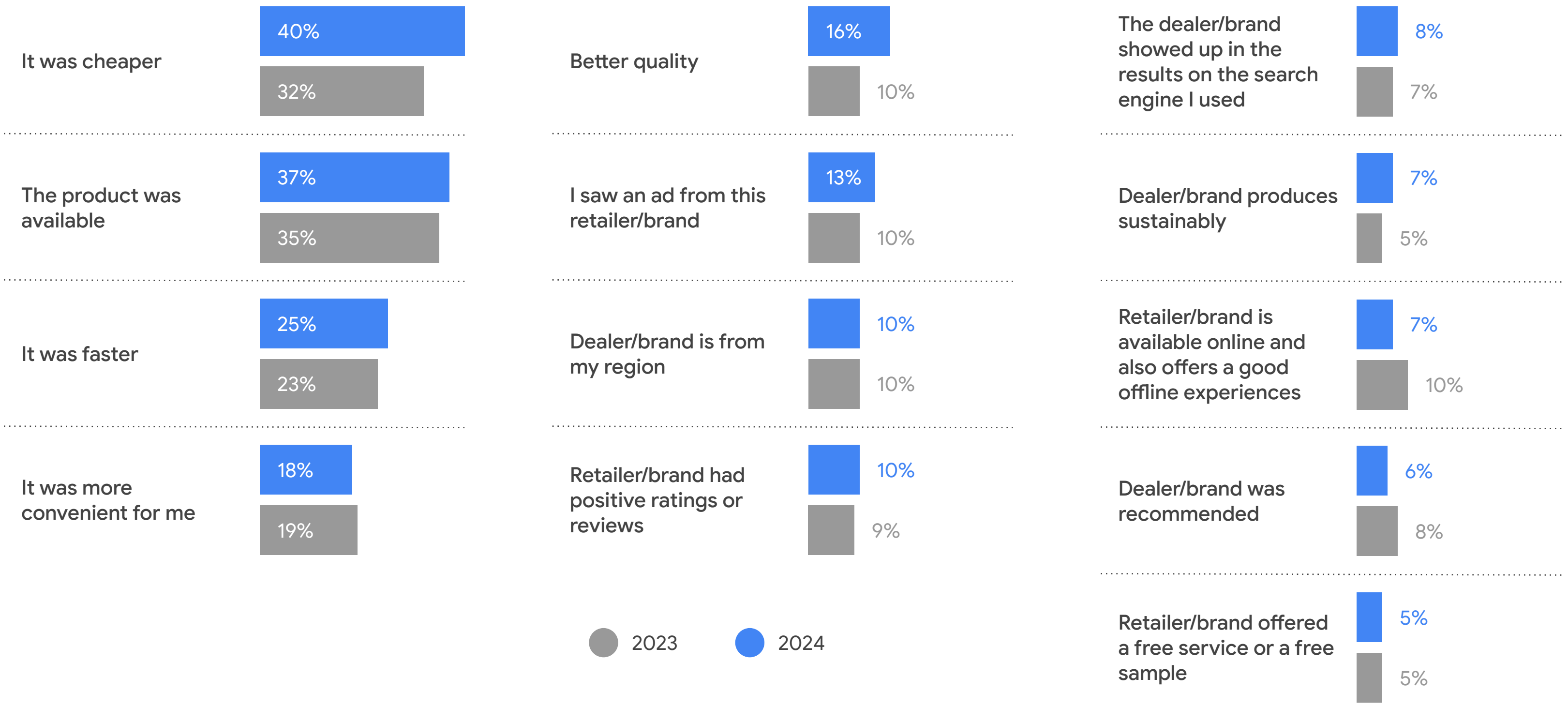
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2106/2106/2201/1422, CE n=187/175/217/183, Home n=227/218/277/231, Fashion n=412/423/453/437, Food n=604/657/532/0, Beauty n=425/414/425/452, Toys n=136/103/129/119, Jewellery n=116/116/169/0, 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: Finland. 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=518, CE n=39, Home n=37, Fashion n=85, Food n=166, Beauty n=119, Toys n=29, Jewellery n=42, Q33_1 Thinking about that new purchase, where did you buy the product from for the first time?

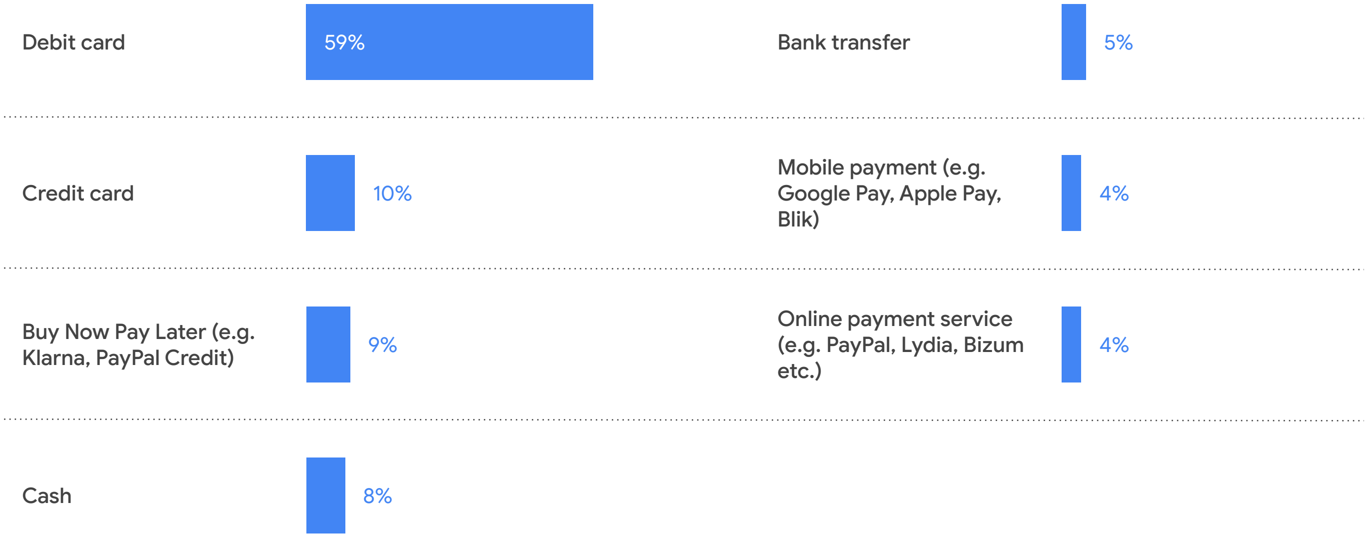
Reasons for purchasing from a new store



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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: Buyers of new retailer/ new marketplace/ new brand of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=518/605, Q34: Why did you buy from a retailer, a platform or a brand you have never bought from before?

Method of payment for last purchase

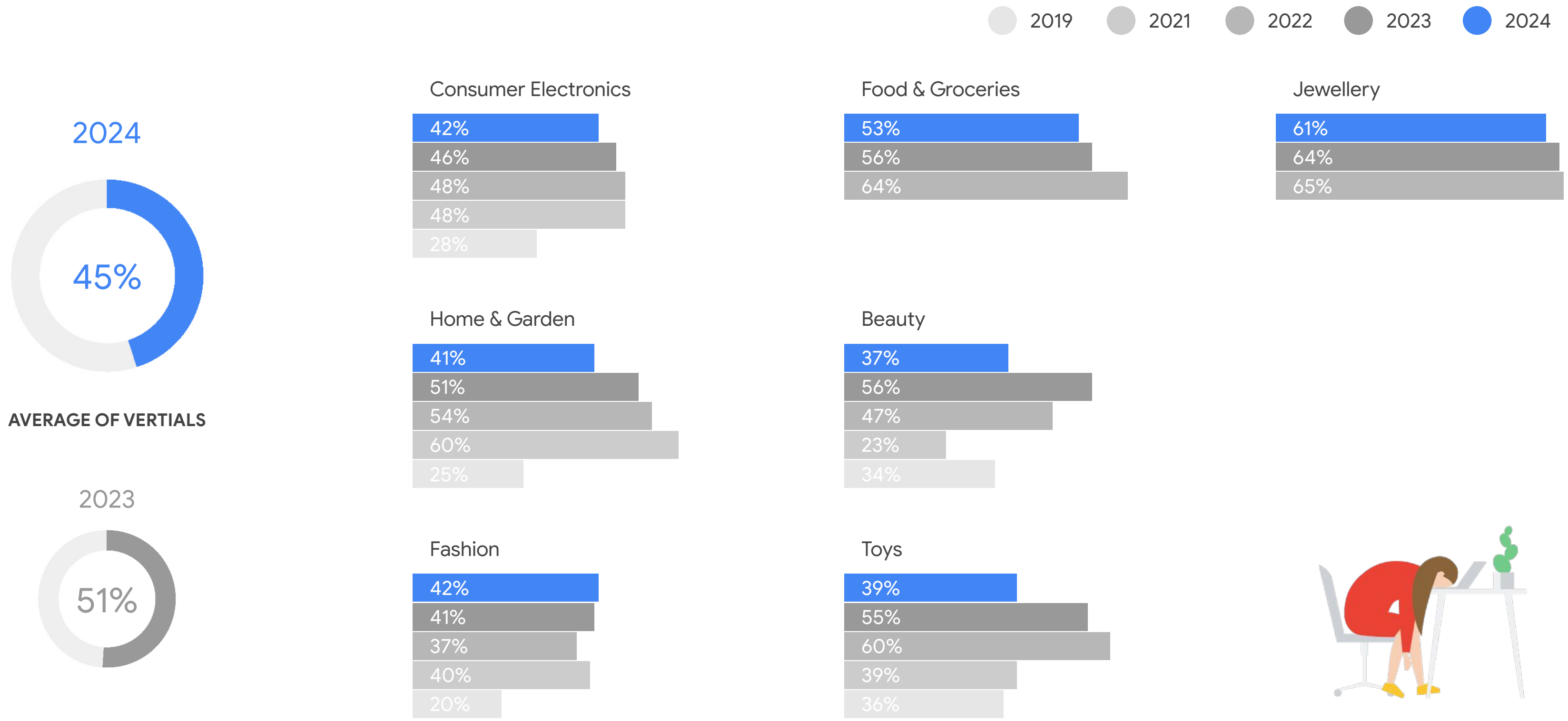
2024



Note: Results show Average of verticals

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106, 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



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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 2024/2023/2022/2021/2019: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=831/856/767/480/471, CE n=111/112/114/87/144, Home n=106/111/107/92/81, Fashion n=198/209/200/181/158, Food n=160/168/89/0/0, Beauty n=131/133/107/83/60, Toys n=45/40/44/36/28, Jewellery n=80/83/106/0/0, Q4: Which of these situations did you experience during your purchase, if any?

Most significant online pain points

2023 2024

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

2024

Pain point	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The product has become more expensive recently	15%	12%	9%	12%	25%	16%	15%	13%
The product I wanted wasn't available	11%	5%	8%	9%	21%	5%	6%	15%
Independent product reviews were hard to find	10%	6%	10%	11%	5%	14%	7%	18%
I couldn't buy without registering or without logging in	9%	10%	9%	8%	11%	6%	4%	15%
I couldn't find the product for my needs quickly	8%	6%	11%	6%	13%	6%	11%	8%
I couldn't find sufficient information on the product	6%	8%	4%	9%	2%	2%	10%	13%
Return of product wasn't free or it was too expensive	6%	6%	3%	3%	8%	6%	6%	12%
Response time of customer support was too slow	6%	7%	5%	5%	8%	2%	7%	7%

2023

Pain point	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The product has become more expensive recently	18%	11%	17%	12%	28%	19%	23%	18%
The product I wanted wasn't available	9%	7%	7%	8%	9%	6%	21%	13%
Independent product reviews were hard to find	11%	16%	18%	8%	7%	7%	11%	17%
I couldn't buy without registering or without logging in	9%	12%	9%	8%	6%	9%	12%	11%
I couldn't find the product for my needs quickly	9%	9%	12%	9%	8%	9%	11%	11%
I couldn't find sufficient information on the product	9%	9%	7%	8%	13%	6%	14%	10%
Return of product wasn't free or it was too expensive	0%	0%	0%	0%	0%	0%	0%	0%
Response time of customer support was too slow	8%	11%	2%	9%	9%	5%	15%	13%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=831/856, CE n=111/112, Home n=106/111, Fashion n=198/209, Food n=160/168, Beauty n=131/133, Toys n=45/40, Jewellery n=80/83, Q4: Which of these situations did you experience during your purchase, if any?

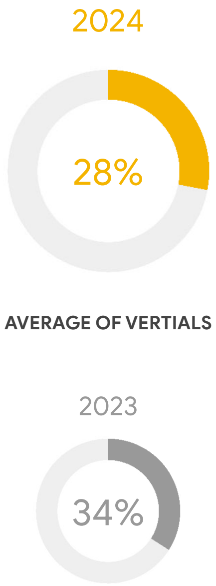
Other online pain points

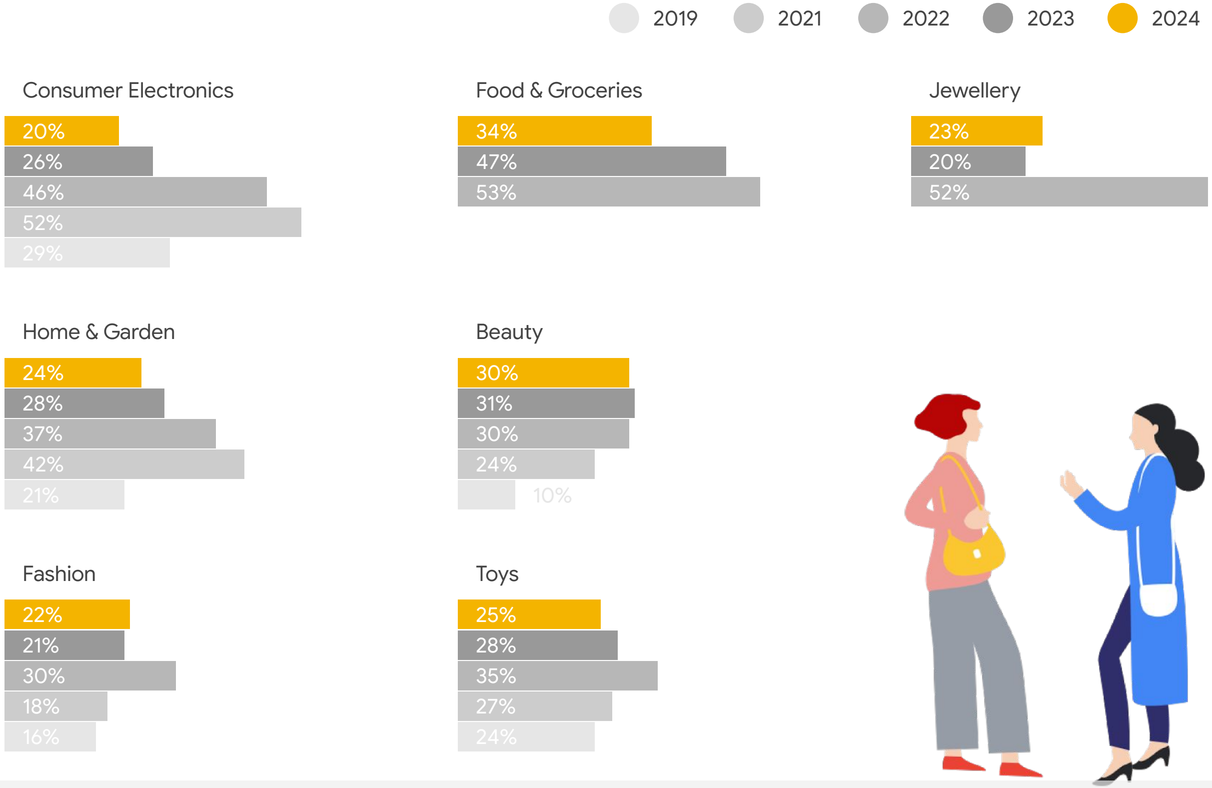
Note: Other online pain points, results ranked by Average of verticals.

	Average of verticals		Consumer Electronics		Home & Garden		Fashion		Food & Groceries		Beauty		Toys		Jewellery	
	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023
Return policy wasn't clear enough	5%	8%	5%	11%	5%	10%	6%	5%	4%	5%	4%	8%	6%	5%	7%	17%
They didn't offer an option to return a product at a location nearby	4%	5%	2%	7%	4%	7%	5%	4%	4%	2%	1%	3%	7%	10%	9%	15%
The purchase process was interrupted due to a technical issue	4%	6%	6%	6%	6%	3%	2%	5%	4%	9%	3%	3%	3%	6%	8%	11%
I didn't have time to do sufficient product research	4%	8%	5%	10%	2%	6%	4%	4%	4%	5%	2%	11%	9%	11%	9%	12%
Delivery fees or options weren't clear enough	4%	7%	6%	10%	2%	8%	1%	7%	6%	5%	3%	3%	7%	9%	5%	12%
Pricing wasn't clear enough	4%	6%	2%	5%	6%	7%	1%	5%	8%	7%	1%	5%	5%	12%	5%	9%
My preferred payment method was not available	3%	7%	4%	9%	2%	4%	4%	6%	3%	7%	0%	6%	4%	10%	6%	8%
I needed support and couldn't contact anyone	3%	8%	3%	9%	4%	9%	1%	5%	4%	6%	2%	7%	4%	16%	7%	14%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=831/856, CE n=111/112, Home n=106/111, Fashion n=198/209, Food n=160/168, Beauty n=131/133, Toys n=45/40, Jewellery n=80/83, 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: Finland. 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 2024/2023/2022/2021/2019: Offline buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1275/1250/1433/1099/1607, CE n=76/63/103/119/201, Home n=121/107/169/167/270, Fashion n=213/214/252/303/441, Food n=444/489/443/0/0, Beauty n=294/281/317/416/559, Toys n=91/63/85/95/137, Jewellery n=36/33/63/0/0, Q4: Which of these situations did you experience during your purchase, if any?

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	2024	11%	6%	9%	3%	16%	15%	8%	7%
	2023	21%	3%	7%	6%	38%	14%	12%	7%
Check out took too long / lines at check out	2024	6%	4%	6%	6%	7%	7%	8%	4%
	2023	6%	6%	4%	3%	8%	7%	7%	3%
I couldn't find the product for my needs quickly	2024	6%	1%	6%	3%	8%	8%	4%	1%
	2023	5%	7%	5%	4%	6%	4%	7%	4%
The product I wanted wasn't available	2024	5%	2%	5%	1%	10%	3%	2%	6%
	2023	3%	4%	0%	1%	5%	3%	4%	0%
No service, no consultancy in the store	2024	4%	1%	2%	9%	2%	4%	4%	5%
	2023	3%	4%	6%	4%	1%	4%	6%	2%
I needed support and couldn't find staff	2024	3%	2%	5%	4%	2%	4%	0%	3%
	2023	2%	4%	7%	0%	1%	2%	1%	0%
Pricing wasn't clear enough	2024	2%	1%	2%	0%	3%	2%	4%	3%
	2023	3%	3%	3%	2%	3%	3%	2%	1%
I didn't have time to do sufficient product research	2024	2%	5%	0%	2%	2%	2%	2%	1%
	2023	1%	6%	1%	2%	0%	1%	2%	3%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=1275/1250, CE n=76/63, Home n=121/107, Fashion n=213/214, Food n=444/489, Beauty n=294/281, Toys n=91/63, Jewellery n=36/33, 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
There were no delivery options	2% / 2%	2% / 2%	3% / 1%	0% / 2%	1% / 2%	3% / 2%	2% / 0%	1% / 4%
The delivery period was longer than usual	1% / 1%	3% / 2%	6% / 4%	0% / 1%	0% / 1%	1% / 1%	2% / 0%	3% / 3%
Staff were unfriendly	1% / 0%	2% / 2%	0% / 1%	3% / 0%	0% / 0%	1% / 1%	2% / 1%	8% / 0%
I couldn't find sufficient information on the product	1% / 1%	1% / 4%	3% / 3%	2% / 2%	0% / 1%	1% / 1%	1% / 0%	5% / 0%
I wanted to look online for information while in store but didn't have access	1% / 1%	1% / 0%	2% / 1%	0% / 1%	0% / 0%	0% / 1%	1% / 2%	1% / 0%
The shop was closed and didn't offer an online shop	0% / 1%	0% / 3%	0% / 1%	0% / 0%	0% / 0%	0% / 1%	0% / 1%	2% / 3%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=1275/1250, CE n=76/63, Home n=121/107, Fashion n=213/214, Food n=444/489, Beauty n=294/281, Toys n=91/63, Jewellery n=36/33, Q4: Which of these situations did you experience during your purchase, if any?

Ways of obtaining the product

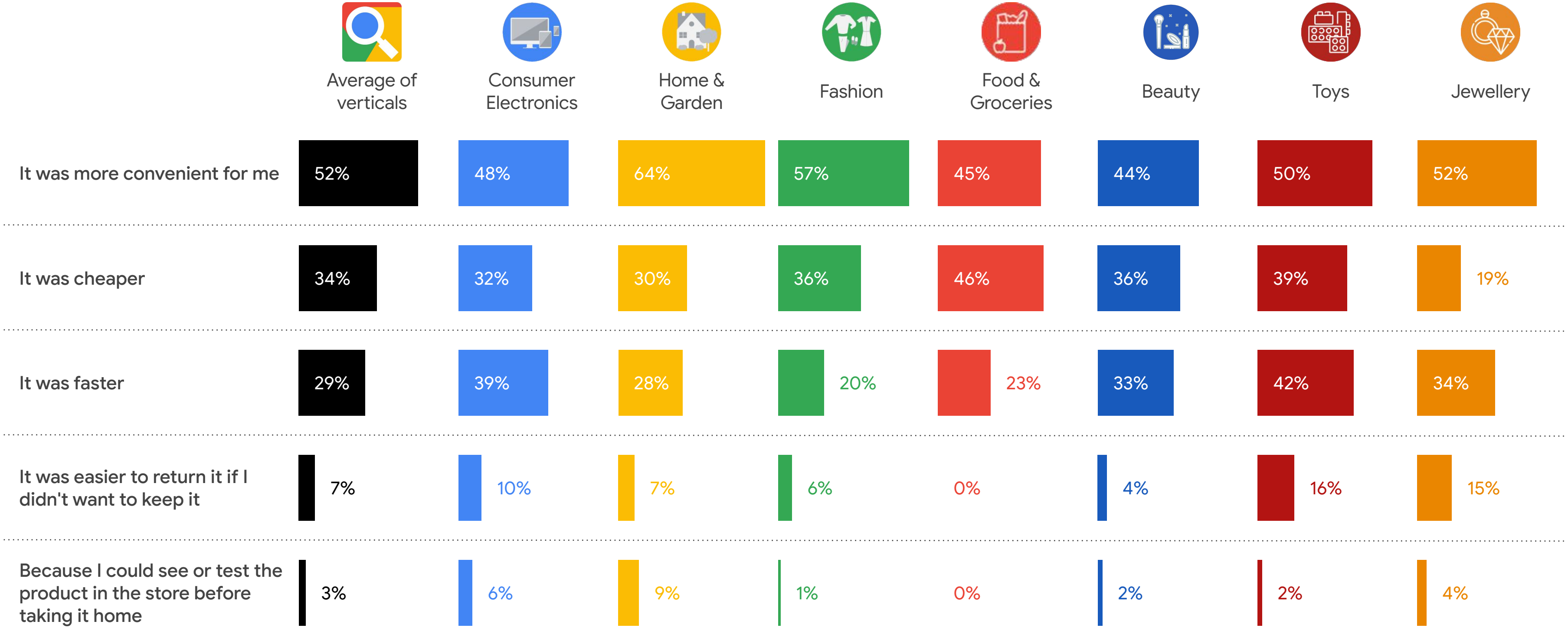
2024

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I bought in store and took it home myself	58%	36%	41%	51%	73%	67%	65%	29%
I bought in store and had it delivered to my home	1%	2%	11%	0%	0%	0%	0%	1%
I bought in store and had it delivered to a pick-up location near me	0%	0%	0%	0%	0%	1%	1%	1%
I bought it online or via phone and it was delivered to my home	9%	14%	18%	8%	6%	6%	5%	19%
I bought it online or via phone and it was delivered to a pick-up location near me	18%	30%	13%	32%	7%	12%	17%	39%
I bought it online or via phone and picked it up in a store	4%	12%	7%	3%	2%	3%	4%	4%
I ordered it online but paid in a store during the pick-up	2%	4%	4%	0%	1%	2%	2%	4%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106, CE n=187, Home n=227, Fashion n=412, Food n=604, Beauty n=425, Toys n=136, Jewellery n=116, Q2_A. How did you get the product?

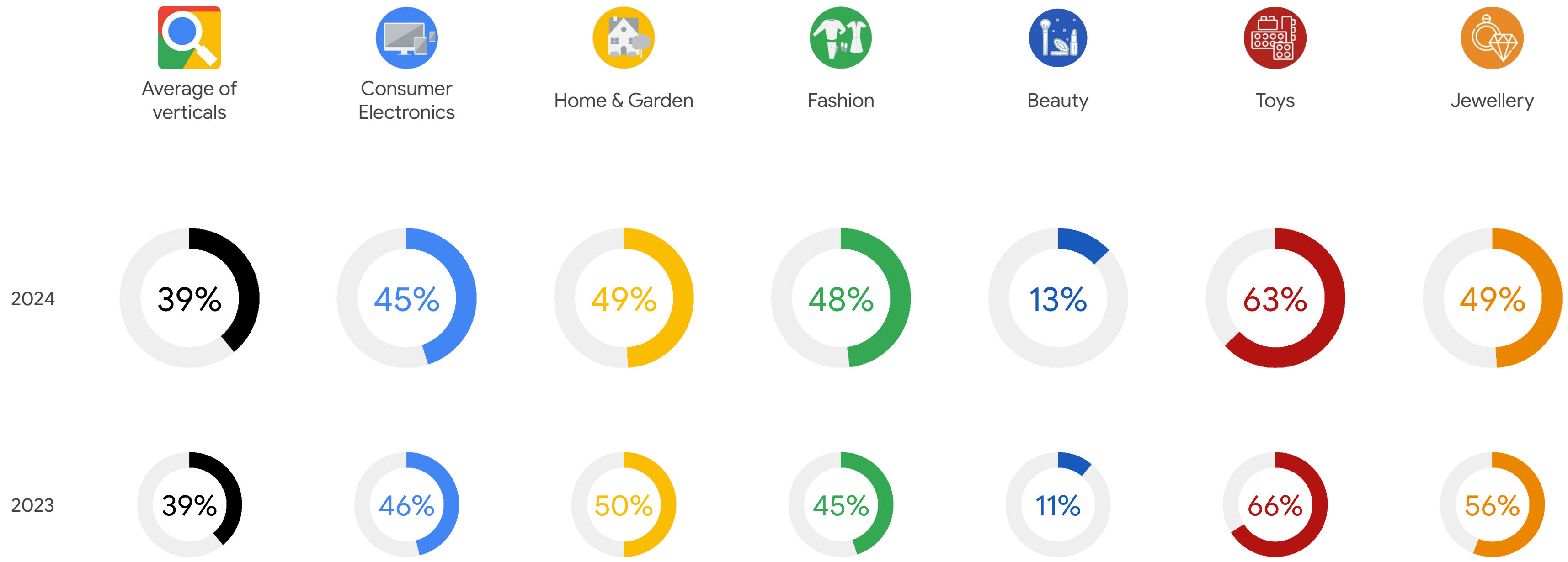
Reasons for pick-up in-store or at a pick-up location

2024



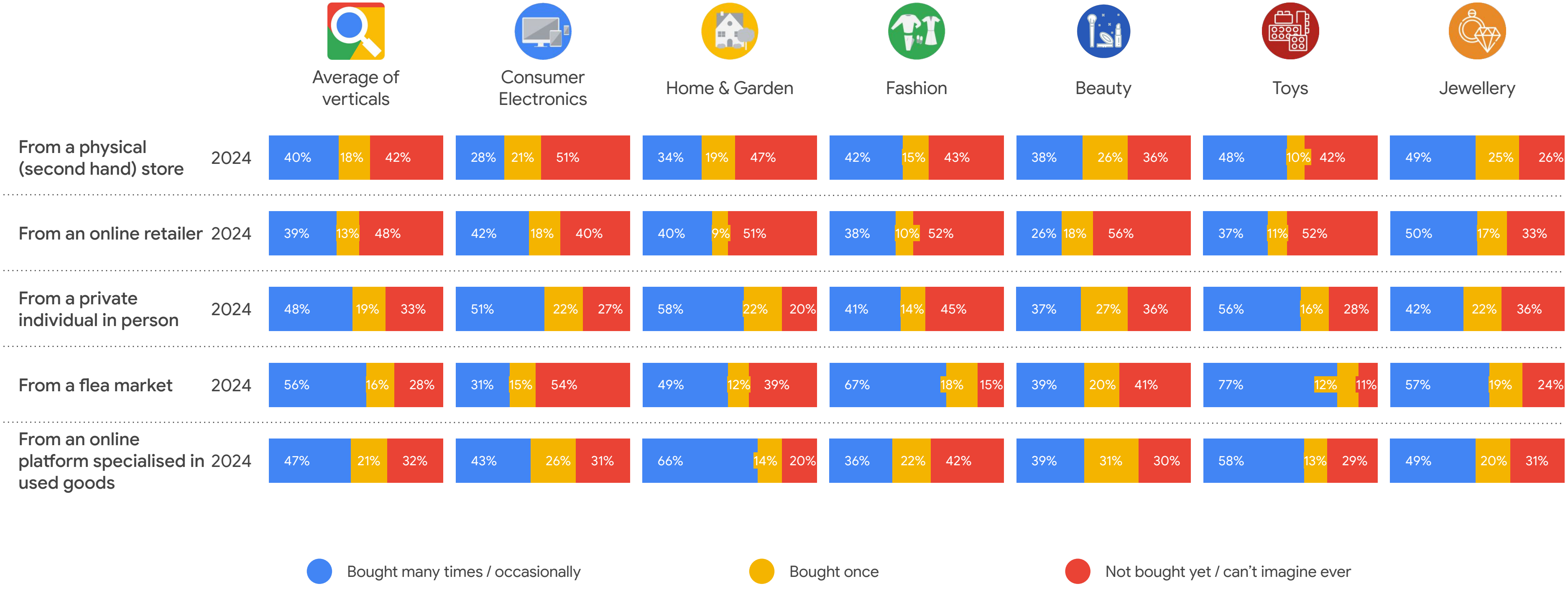
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=500, CE n=84, Home n=54, Fashion n=146, Food n=60, Beauty n=71, Toys n=31, Jewellery n=55, 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



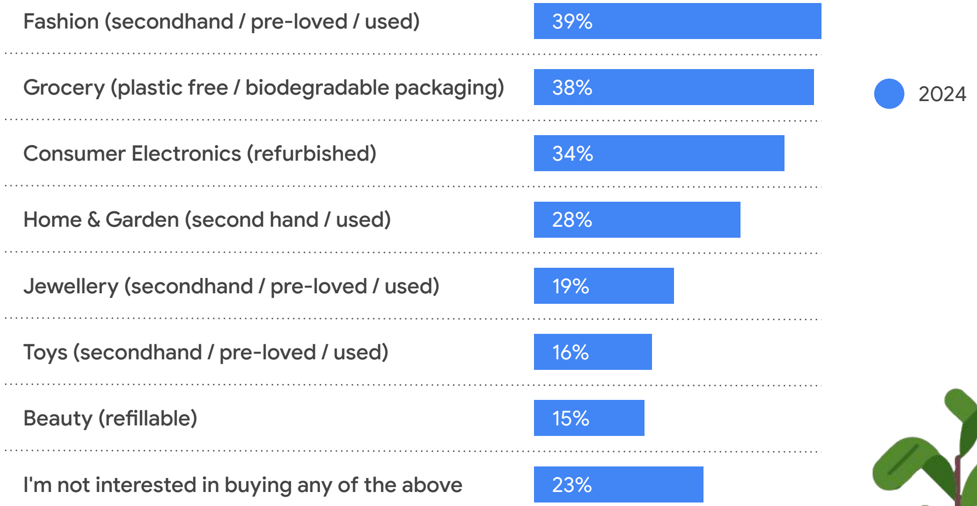
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023: All product buyers of CE, Home, Fashion, Beauty, Toys, Jewellery n=1502/1449, CE n=187/175, Home n=227/218, Fashion n=412/423, Beauty n=425/414, Toys n=136/103, Jewellery n=116/116, Q100. Please think of all the products you have ever bought in this category. Have you ever bought used goods?

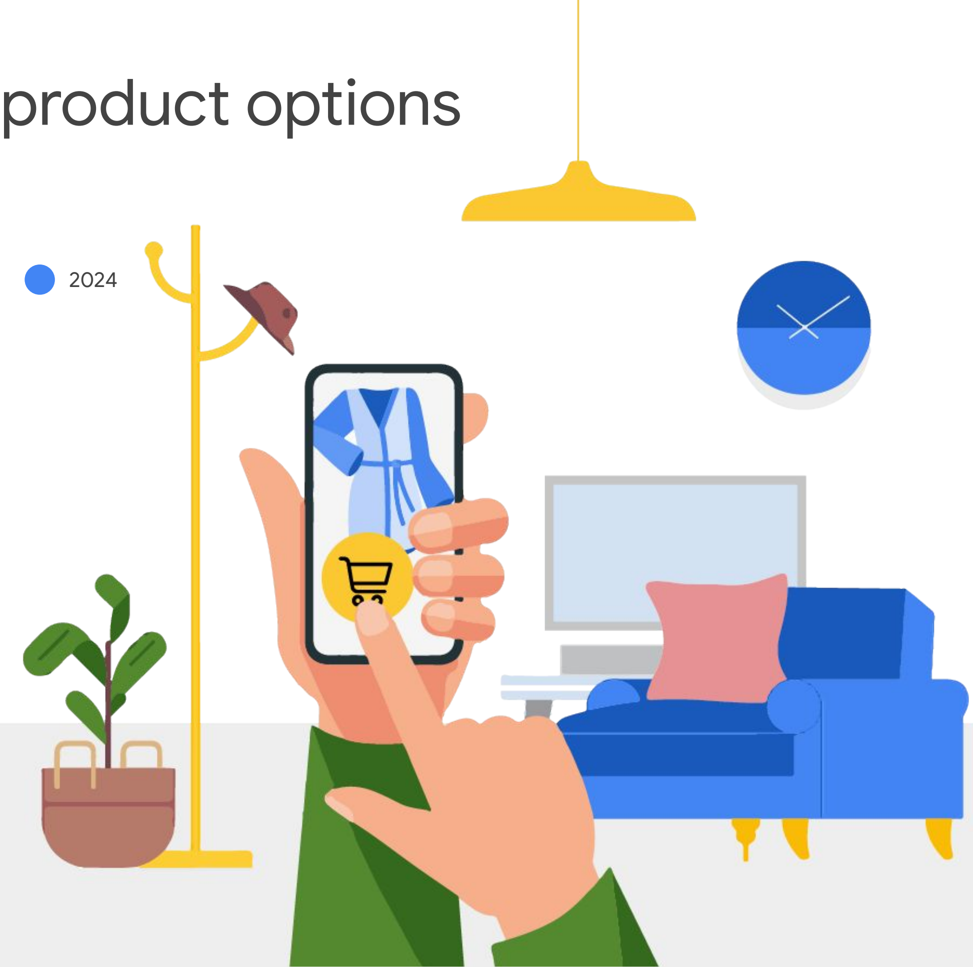
Location and frequency of purchasing used goods



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=591, CE n=84, Home n=111, Fashion n=196, Beauty n=57, Toys n=86, Jewellery n=57, Q101. Where and how often have you bought used goods?

Overall interest in sustainable product options

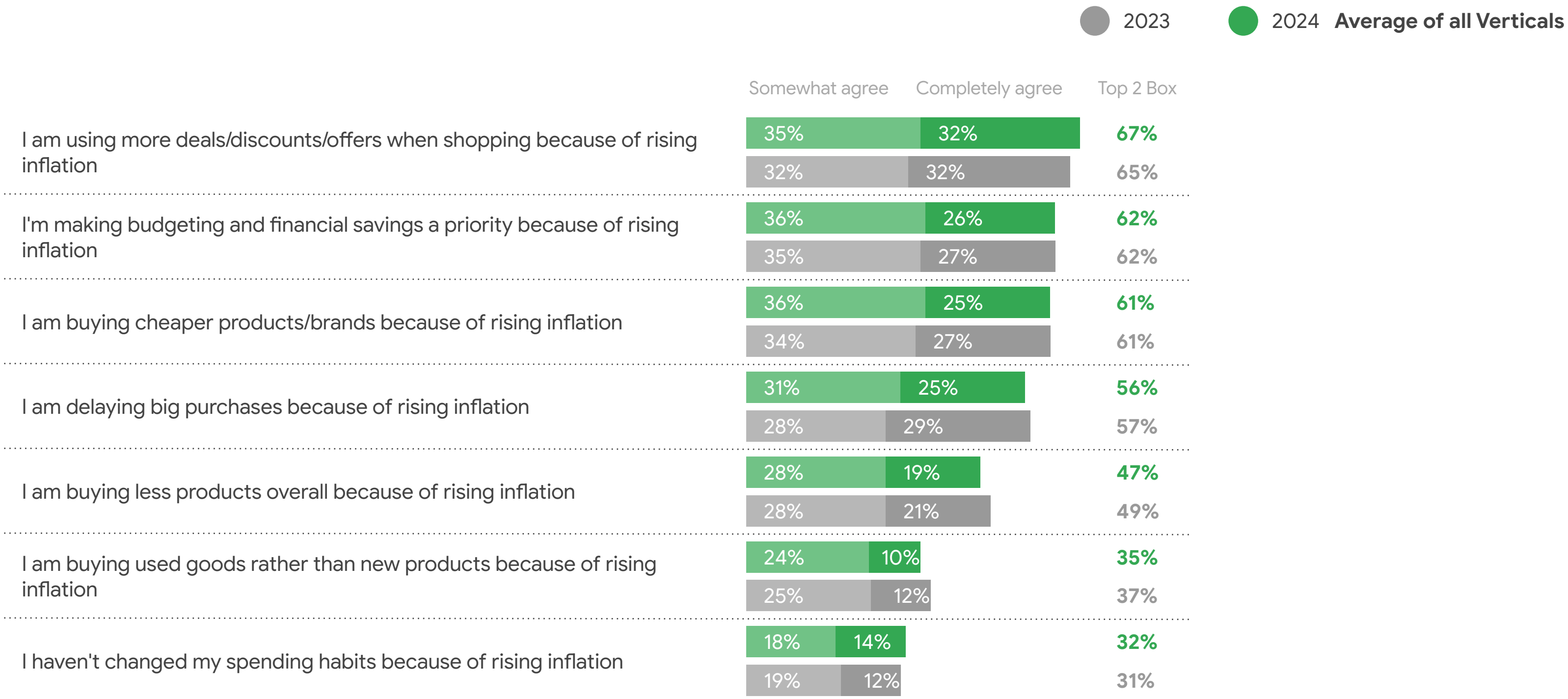




Note: Results show Average of verticals

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106, 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



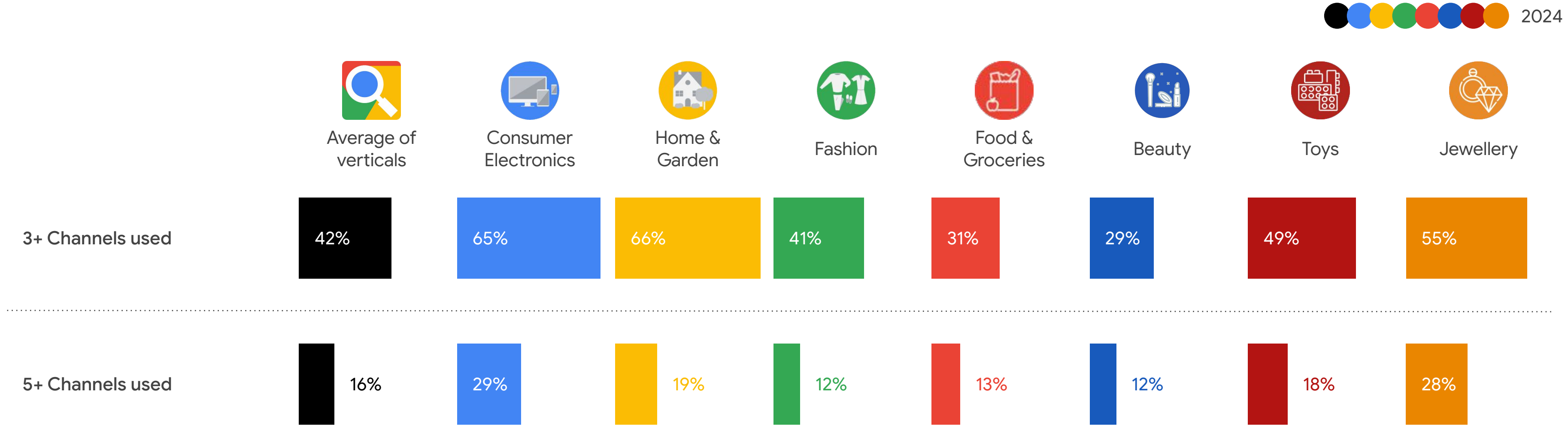
Note: Results show Top 2 boxes (somewhat agree & completely agree) ranked by average of all verticals in 2024. In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106/2106, Q104. To what extent do you agree or disagree with the following statements?

Chapter 2

Product Discovery & Research

Channel usage during the shopping journey



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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106, CE n=187, Home n=227, Fashion n=412, Food n=604, Beauty n=425, Toys n=136, Jewellery n=116, Q9Bis. How many times have you conducted each of the following activities related to your last purchase in the category?

First product awareness for last purchase

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
First Awareness Online	30%	56%	51%	37%	18%	14%	28%	51%
First Awareness Through Offline Touch Points	34%	21%	35%	45%	31%	32%	45%	28%
First Awareness Through Previous Product Experience	26%	9%	6%	11%	43%	44%	8%	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: Finland. 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=2106, CE n=187, Home n=227, Fashion n=412, Food n=604, Beauty n=425, Toys n=136, Jewellery n=116, Q7: How did you first become aware of the product you purchased?

What comes first - retailer or brand?

Consumer Electronics

	I already knew the brand	I already knew the retailer	I don't know/remember
2024	48%	36%	16%
2023	44%	41%	15%

Food & Groceries

	I already knew the brand	I already knew the retailer	I don't know/remember
2024	29%	63%	9%
2023	30%	56%	14%

Jewellery

	I already knew the brand	I already knew the retailer	I don't know/remember
2024	31%	49%	20%
2023	32%	52%	16%

Home & Garden

	I already knew the brand	I already knew the retailer	I don't know/remember
2024	28%	43%	29%
2023	22%	53%	25%

Beauty

	I already knew the brand	I already knew the retailer	I don't know/remember
2024	48%	45%	8%
2023	43%	41%	16%

AVERAGE OF ALL VERTICALS

	I already knew the brand	I already knew the retailer	I don't know/remember
2024	34%	50%	16%
2023	34%	48%	19%

Fashion

	I already knew the brand	I already knew the retailer	I don't know/remember
2024	24%	51%	25%
2023	29%	42%	28%

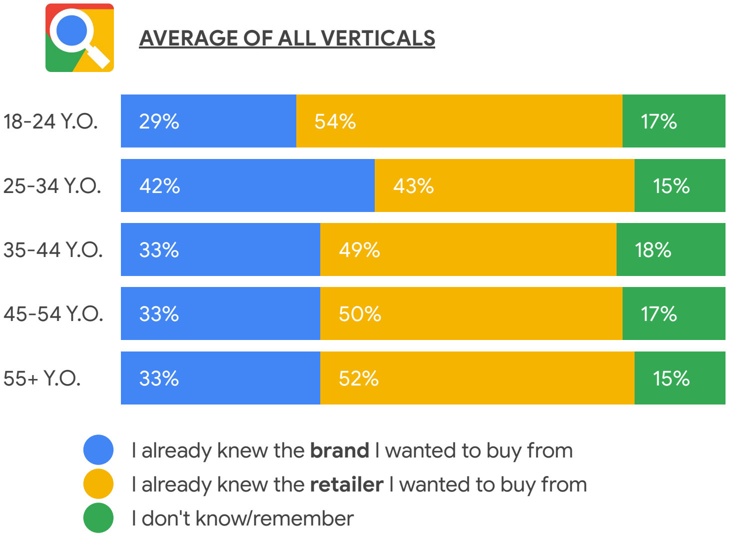
Toys

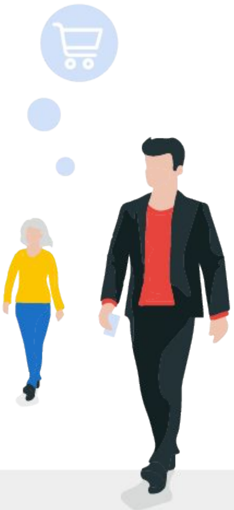
	I already knew the brand	I already knew the retailer	I don't know/remember
2024	42%	36%	22%
2023	42%	40%	18%

- 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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106/2106, CE n=187/175, Home n=227/218, Fashion n=412/423, Food n=604/657, Beauty n=425/414, Toys n=136/103, Jewellery n=116/116, 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?

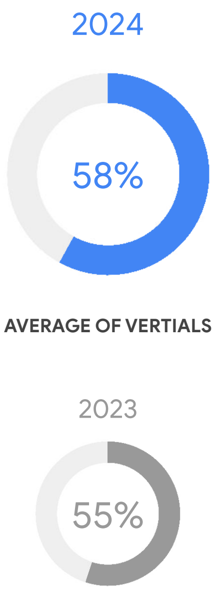


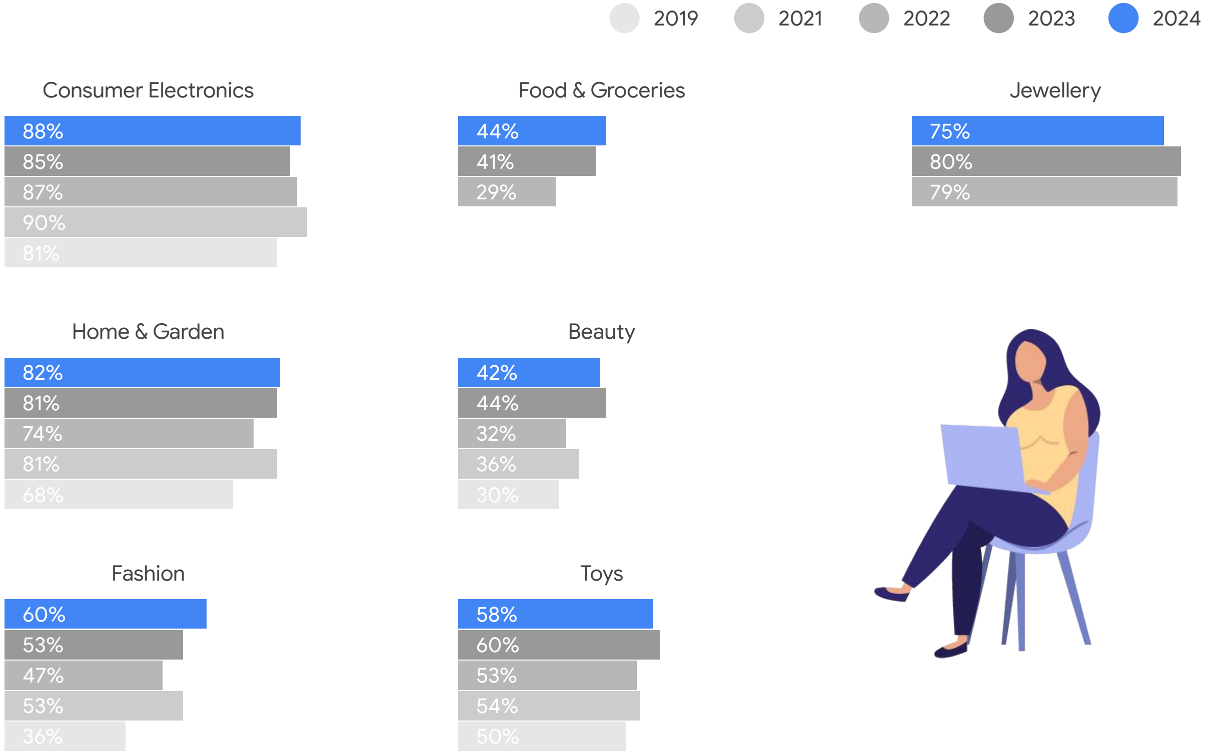


Note: 2024 results

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106/2106, 18-24 n=217/217, 25-34 n=332/330, 35-44 n=335/335, 45-54 n=326/327, 55+ n=896/897, Q8: Which of the following statements best applies to you. When I started looking for the product I wanted to buy...

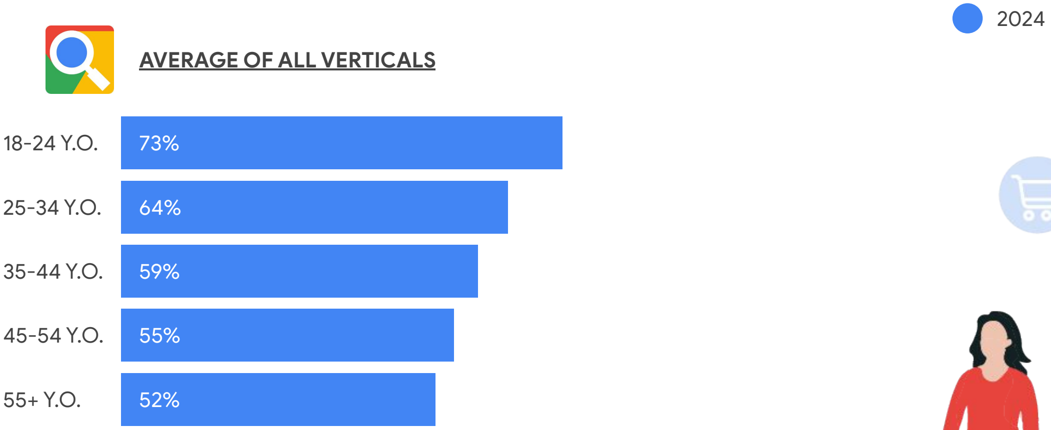
Online research prior to purchase

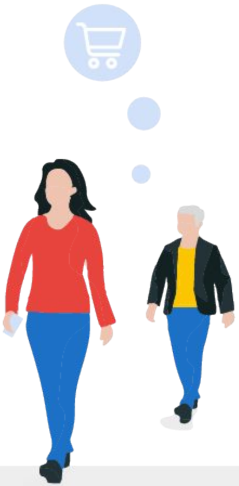




Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2106/2106/2201/1621/2078, CE n=187/175/217/215/345, Home n=227/218/277/268/350, Fashion n=412/423/453/495/599, Food n=604/657/532/0/0, Beauty n=425/414/425/507/619, Toys n=136/103/129/136/165, Jewellery n=116/116/169/0/0, Q9: Where did you gather information online (on any device, via website, or app) regarding the product you bought, if at all?

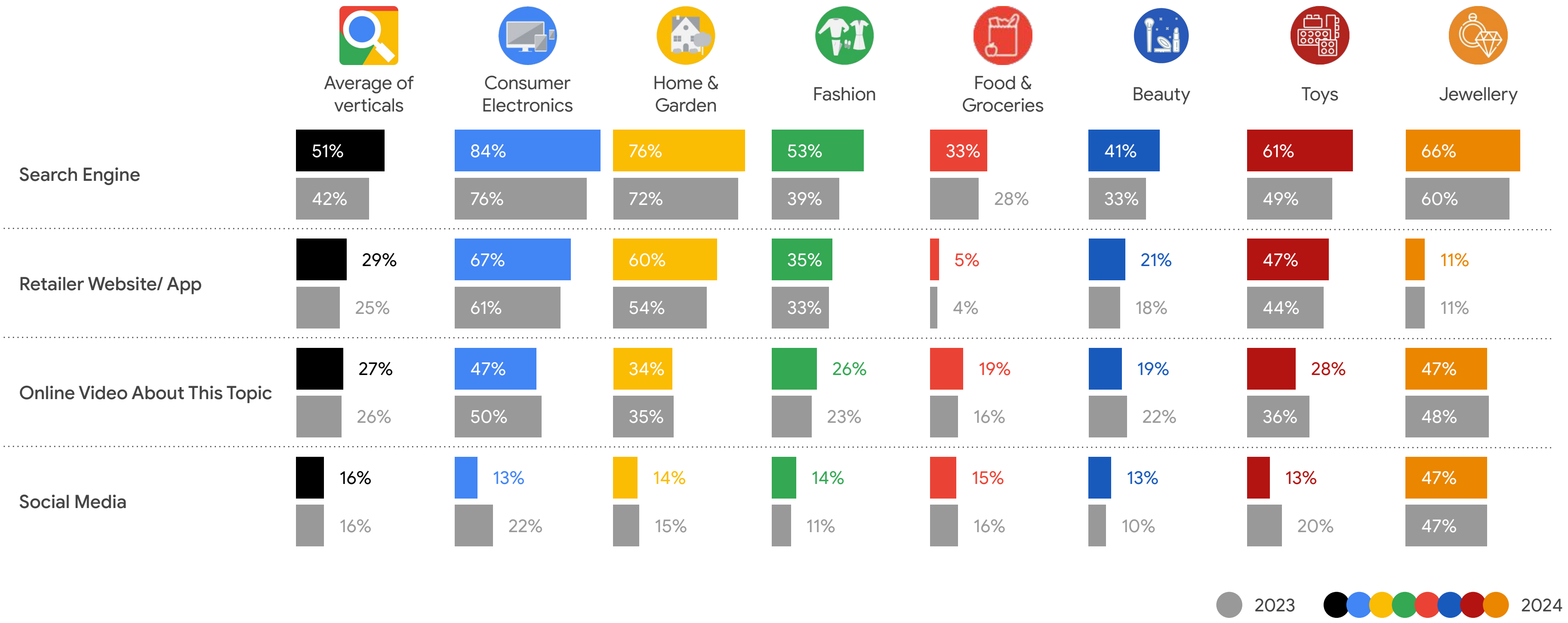
Online research prior to purchase





Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106, 18-24 n=217, 25-34 n=332, 35-44 n=335, 45-54 n=326, 55+ n=896, 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: Finland. 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=2106/2106, CE n=187/175, Home n=227/218, Fashion n=412/423, Food n=604/657, Beauty n=425/414, Toys n=136/103, Jewellery n=116/116, 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

2022 2023 2024

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

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
2024	96%	98%	95%	95%	95%	100%	97%	97%
2023	97%	98%	94%	97%	100%	100%	100%	93%
2022		99%	99%	92%	100%	95%	90%	91%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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 2024/2023/2022: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=397/294/256, CE n=78/58/56, Home n=90/59/60, Fashion n=67/48/36, Food n=51/37/22, Beauty n=46/50/29, Toys n=38/18/23, Jewellery n=27/24/29, 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

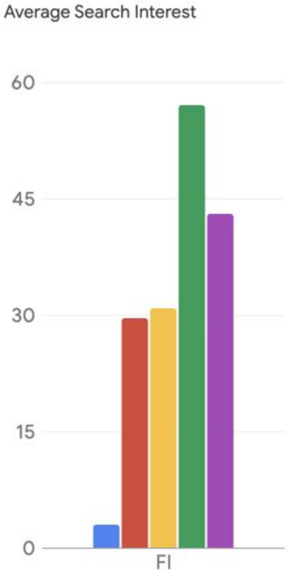
Examples:

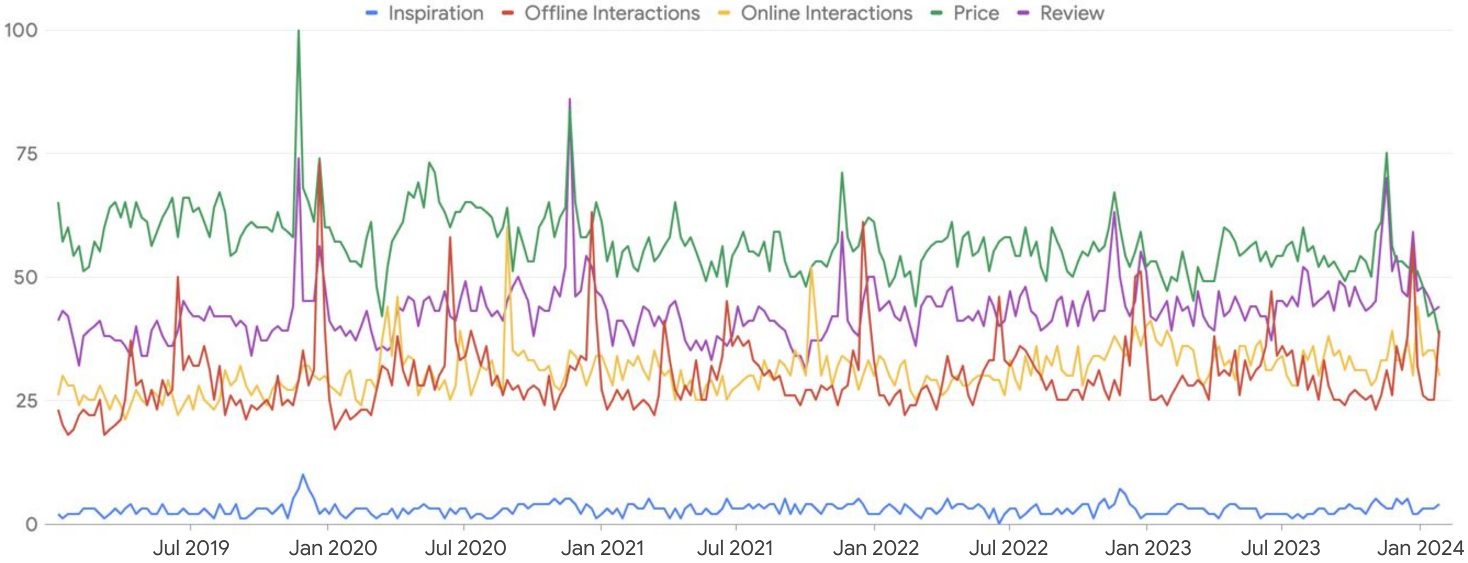
ideas

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	26%	20%	54%
2023	27%	22%	52%

Food & Groceries

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	47%	15%	38%
2023	52%	15%	33%

Jewellery

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	41%	22%	37%
2023	38%	25%	37%

Home & Garden

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	22%	22%	56%
2023	25%	19%	56%

Beauty

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	49%	15%	36%
2023	43%	18%	39%

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	40%	18%	43%
2023	41%	18%	42%

Fashion

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	35%	18%	47%
2023	36%	17%	46%

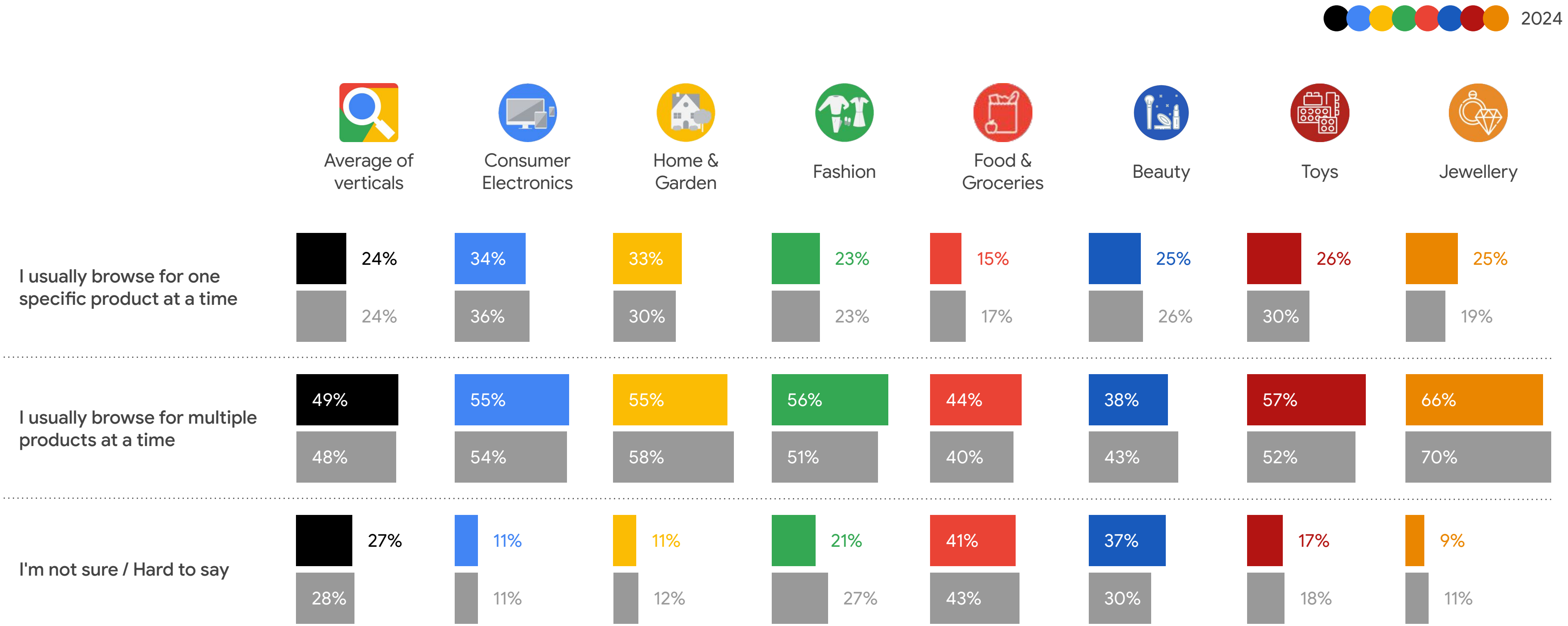
Toys

	Just browsing for fun	Browsing for inspiration for a later purchase	Actively browsing for a product you plan to buy
2024	39%	20%	41%
2023	36%	20%	44%

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

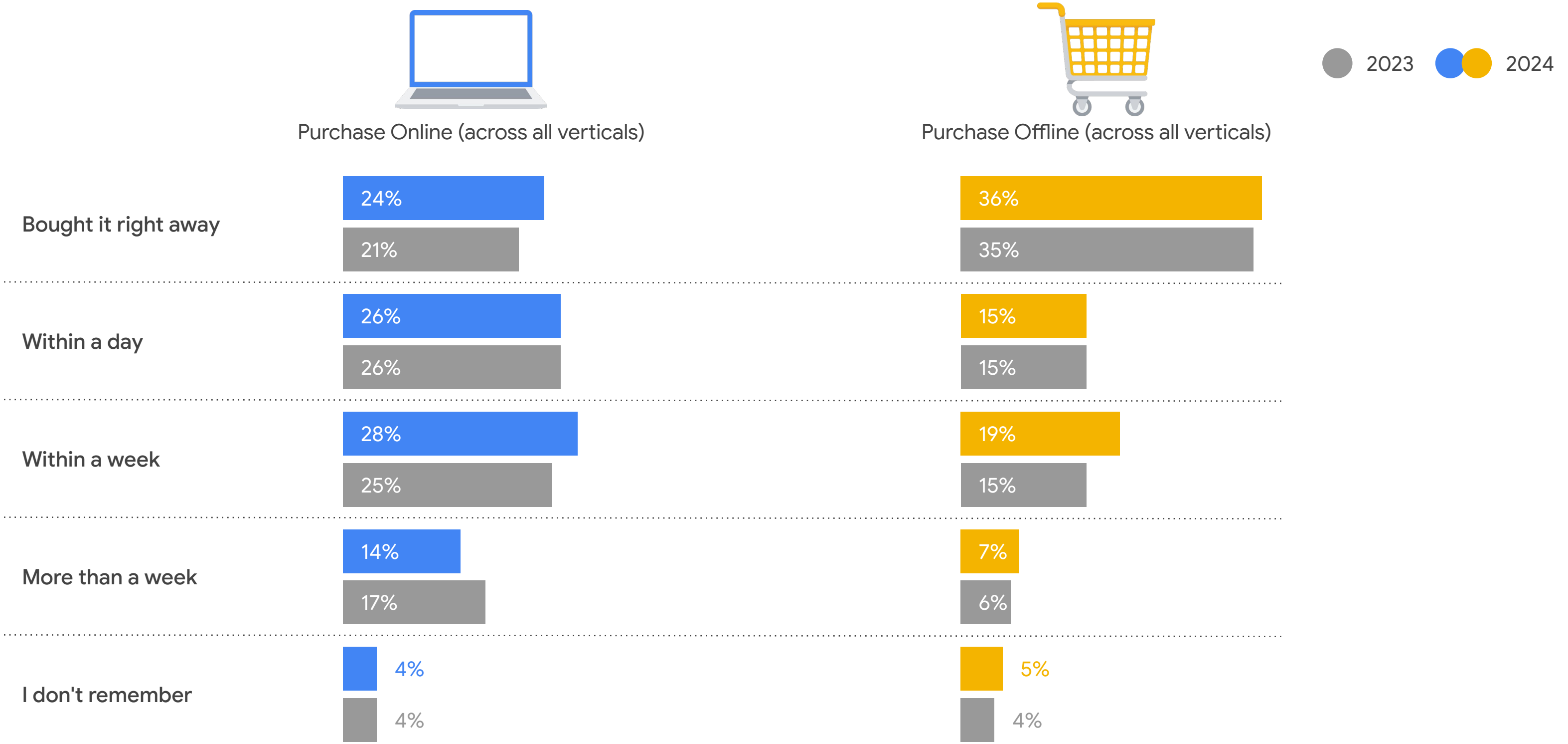
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2106/2106, CE n=187/175, Home n=227/218, Fashion n=412/423, Food n=604/657, Beauty n=425/414, Toys n=136/103, Jewellery n=116/116, 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: Finland. 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=2106/2106, CE n=187/175, Home n=227/218, Fashion n=412/423, Food n=604/657, Beauty n=425/414, Toys n=136/103, Jewellery n=116/116, 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: Finland. 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=2106/2106, 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	31%	11%	16%	37%	33%	41%	31%	26%
	2023	29%	13%	17%	38%	27%	36%	36%	25%
Within a day	2024	19%	22%	21%	24%	19%	13%	21%	19%
	2023	20%	19%	22%	20%	19%	20%	18%	19%
Within a week	2024	22%	42%	37%	21%	10%	19%	30%	32%
	2023	19%	31%	36%	18%	11%	12%	25%	28%
More than a week	2024	10%	23%	23%	9%	3%	5%	11%	18%
	2023	11%	30%	21%	10%	5%	4%	9%	21%
I don't remember	2024	4%	0%	2%	2%	9%	4%	1%	2%
	2023	4%	4%	3%	3%	7%	4%	3%	3%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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=2106/2106, CE n=187/175, Home n=227/218, Fashion n=412/423, Food n=604/657, Beauty n=425/414, Toys n=136/103, Jewellery n=116/116, 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

	2024	2023
Aggregation: % of consumers who used at least one tool/technology below when looking for inspiration about what to buy in the last 6 months	32%	38%
Short form videos (e.g. YouTube Shorts, Instagram reels, Facebook stories, LinkedIn stories, TikToks etc.)	14%	15%
Social commerce (products ordered via social networks, such as Youtube, Instagram, Facebook, Linkedin, TikTok etc.)	12%	15%
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)	11%	23%
Chatbot on a brand or a retailer website/app (e.g. talking to a virtual interface to find the product of your needs)	4%	
Chat based AI tools (e.g. Chat GPT, Bard)	4%	
VR (Virtual reality) (e.g. using a VR headset to immerse yourself in an environment)	2%	3%
AR (Augmented reality) (e.g. trying a piece of clothing or an accessory on virtually)	1%	3%
I have not used any of these technologies	68%	62%

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

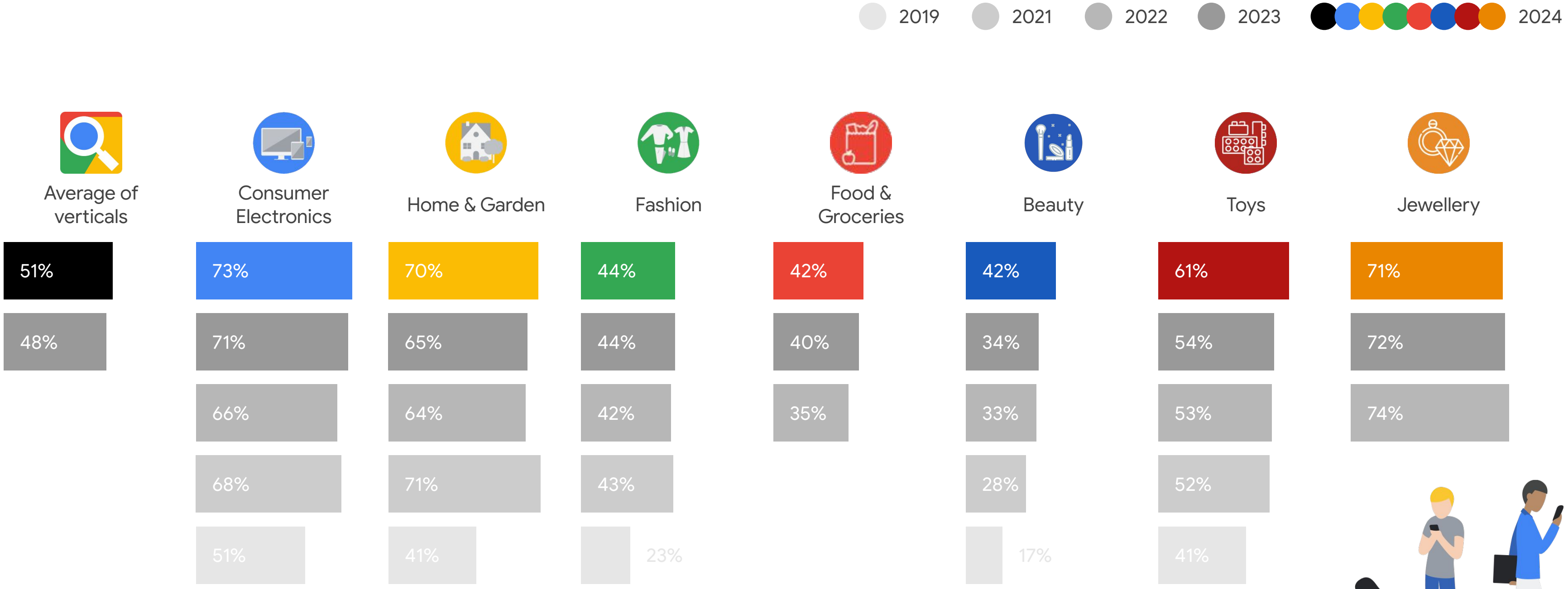
Note: Results show Average of verticals

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	49%	59%	65%	59%	45%	29%
A laptop or desktop computer	39%	35%	27%	36%	45%	47%
A tablet	3%	1%	1%	1%	4%	7%
A smart speaker or voice assistant device	0%	1%	0%	0%	0%	0%

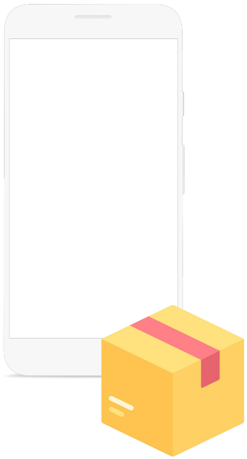
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=831, 18-24 n=144, 25-34 n=176, 35-44 n=125, 45-54 n=139, 55+ n=248, 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: Finland. 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 2024/2023/2022/2021/2019: Respondents using smartphone for their product research, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1964/1972/2026/1415/1785, CE n=179/170/209/179/308, Home n=214/208/255/237/311, Fashion n=385/409/419/426/501, Food n=570/588/471/0/0, Beauty n=382/388/393/454/513, Toys n=129/99/121/119/154, Jewellery n=104/109/158/0/0, Q12: When you were looking for information, did you at any point use your smartphone to get hold of the information you needed?

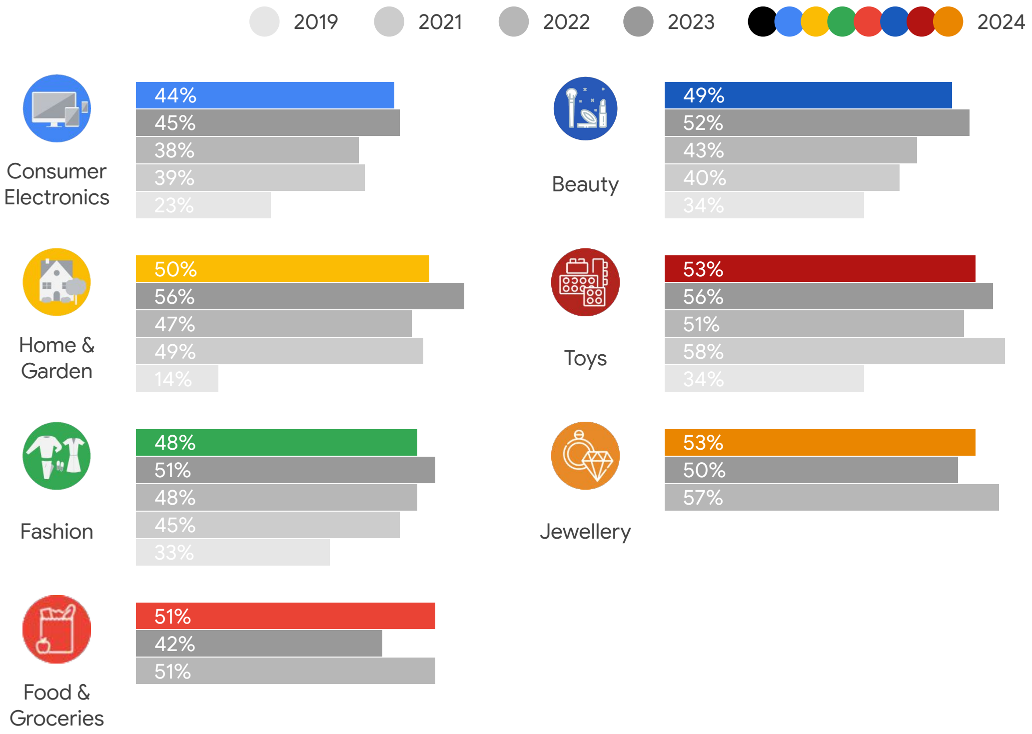
Smartphone usage during online shopping



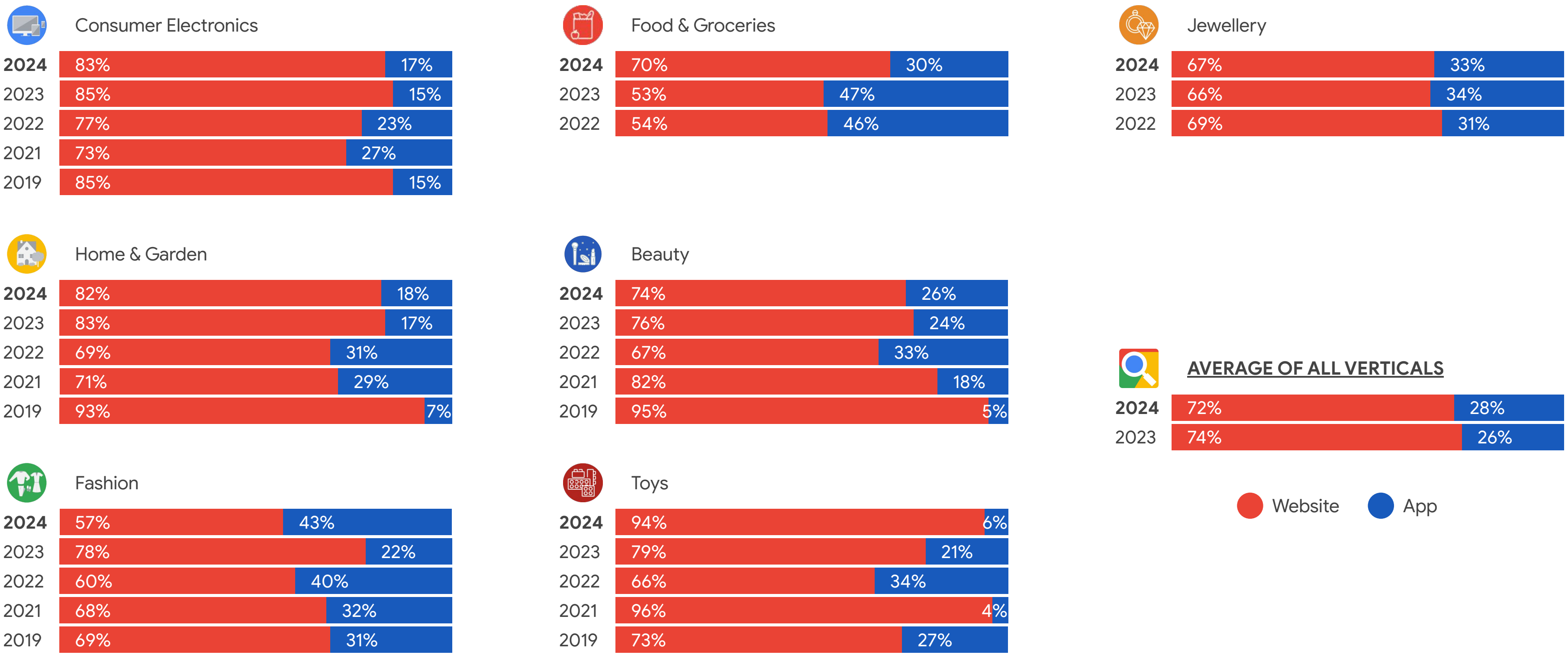
49%

Average of verticals

use their smartphone when making an online purchase across all verticals



Purchases via smartphones: websites vs. apps

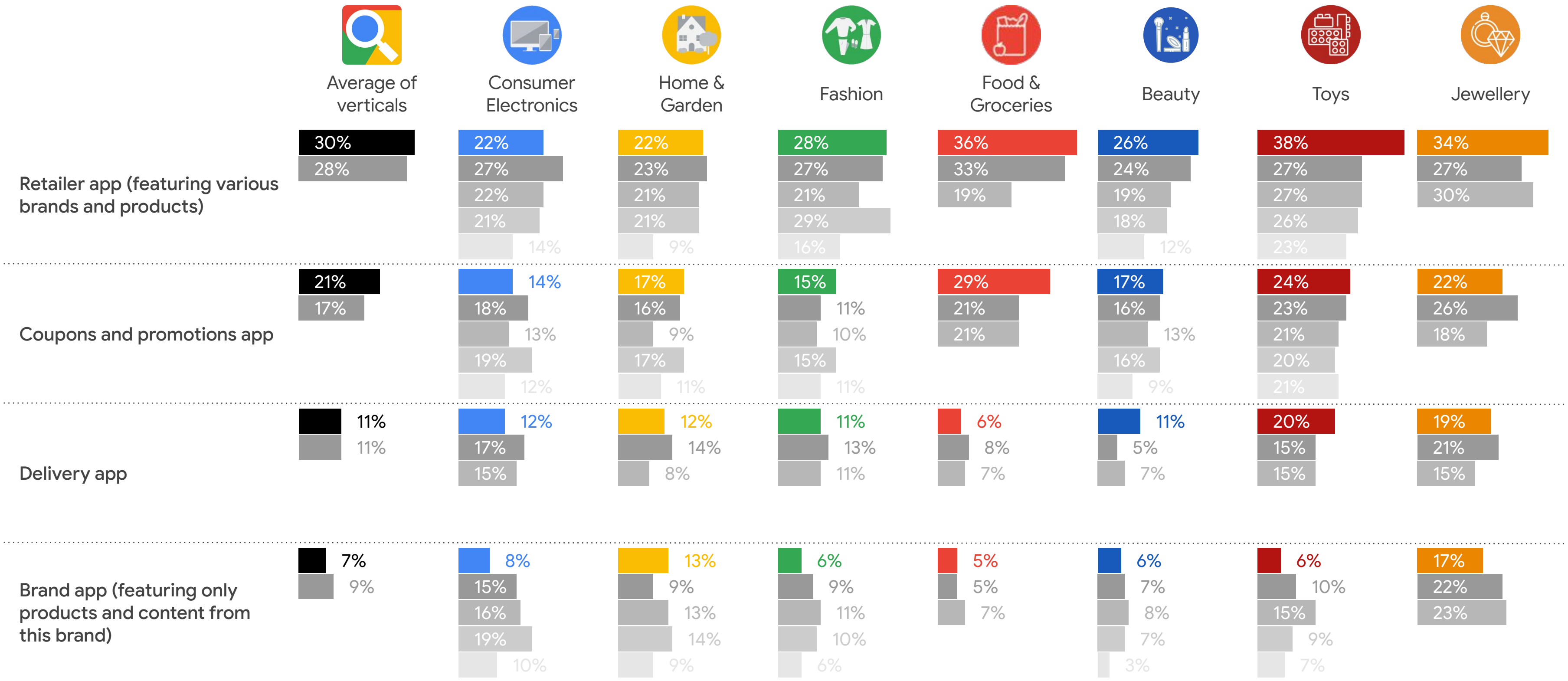


Note: Excluding respondents who did not remember how they bought via their smartphone

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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 2024/2023/2022/2021/2019: Online buyers purchasing via smartphone, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=393/403/350/209/119, CE n=46/47/42/32/31, Home n=53/60/50/42/11, Fashion n=92/102/95/82/49, Food n=77/66/40/0/0, Beauty n=61/66/45/33/18, Toys n=23/21/21/20/10, Jewellery n=41/41/58/0/0, Q3_B: And how did you buy via your smartphone?

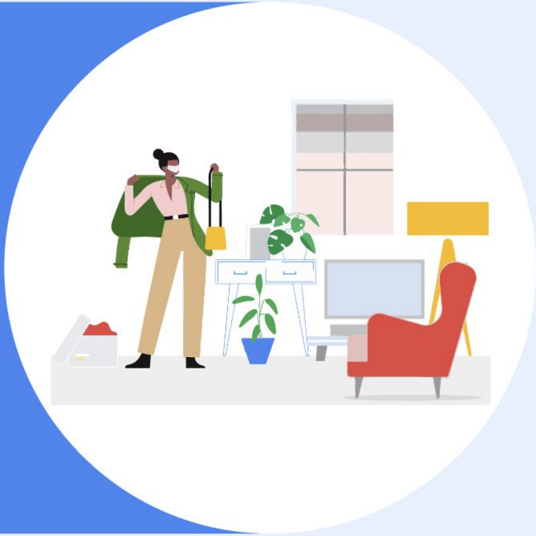
Shopping app installations

2019 2021 2022 2023 2024



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Finland. 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 2024/2023/2022/2021/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2106/2106/2201/1364/1785, CE n=187/175/217/171/308, Home n=227/218/277/222/311, Fashion n=412/423/453/413/501, Food n=604/657/532/0/0, Beauty n=425/414/425/444/513, Toys n=136/103/129/115/154, Jewellery n=116/116/169/0/0, Q20: Which of these shopping apps have you installed on your smartphone, if any?

Google Market Insights



Smart Shopper 2024