Google Market Insights

Smart Shopper 2024

Netherlands country report

March 2024
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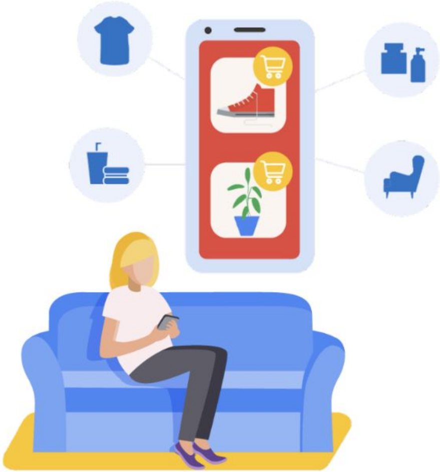

Shape of Shopping
Smart Shopper

by EMEA Market Insights

Introduction

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Study background and methodology

Background:

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

Target population and category definition:

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

Look-back window for purchases:

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

Sample size and sampling approach:

N = 2104, 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
2020: May - June
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	TV and home cinema / gaming / audio and hi-fi
	Mobile devices	Tablets, smartphones, home assistants, cameras
	Laptops, Computers	Computer (desktop, laptop)
Home & Garden	Large home appliances	White goods, e. g. washing machine, dishwasher, refrigerator, stove / oven
	Small appliances	cleaning / kitchen / personal care
	Garden furniture	
	Furniture	Living room / bedroom / kitchen
Fashion	Clothing / Outerwear	Women, men, children, coats and jackets / dresses and skirts / pants / business clothes
	Fitness / Athletic Clothing	Clothes for e. g. football, cycling, swimming, fitness, outdoor, hiking
	Footwear	Women, men, children / formal, casual, comfort, sport shoes
Food & Groceries	Food	Fresh (fruit, vegetables, dairy), canned and dry food, sweets and chocolate, non-alcoholic drinks, alcoholic drinks
	Household items	Cleaning supplies, detergent, toilet paper
Beauty	Personal care	Women, men / body care, skin care, hair care, hygiene
	Cosmetics	
Toys	Indoors	Games, board games, soft toys, baby & toddler, dolls, sports & outdoor toys
	Outdoors	
Jewellery	Jewellery	Bracelet, charm, ring, necklace, precious metals / stones

Content overview


Google Market Insights

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Product Purchase


Google Market Insights

Chapter 2
Product
Discovery &
Research


Chapter 3
Mobile
shopping

Chapter 1: Product Purchase

Chapter 2: Product Discovery & Research

Chapter 3: Mobile Shopping

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

50% vs. 50%
Online vs. offline purchase split

57%
Channel agnostic buyers who are not fully set on one channel

26%
Research online and purchase offline

41%
Experienced online pain points during their shopping journey

50% vs. 35% *(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

97%
Used Google as a search engine for product research

30%
Used new tools/technologies when looking for inspiration about what to buy in the last 6 months

17%
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: NL. 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.

Chapter 1

Product Purchase

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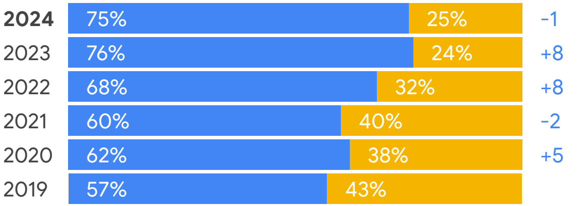
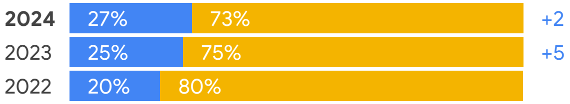
Last purchase: online vs. offline

Consumer Electronics

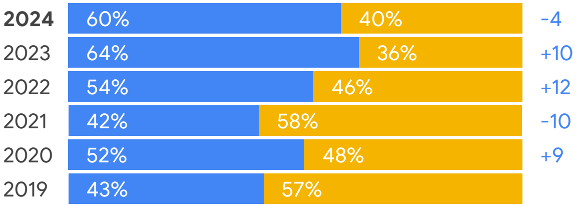


Food & Groceries

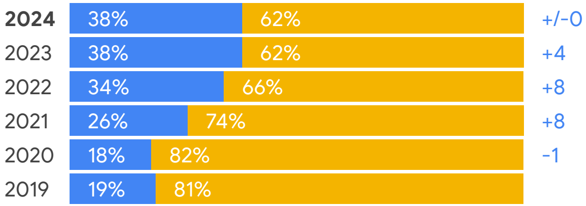


Jewellery

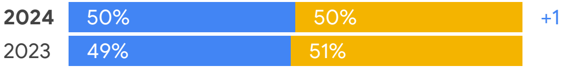
Home & Garden



Beauty

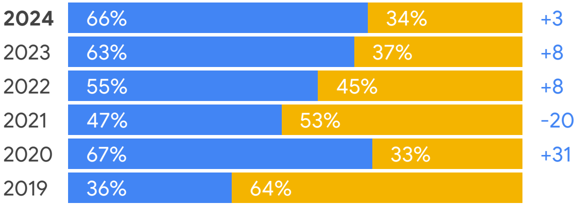


AVERAGE OF ALL VERTICALS

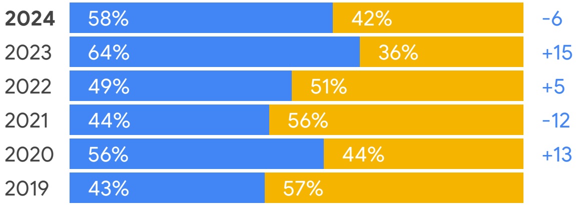


● Online ● Offline

Fashion

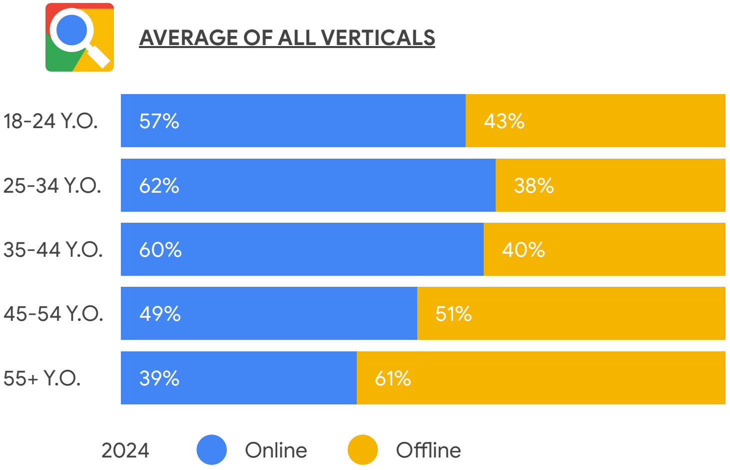


Toys



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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 2024/2023/2022/2021/2020/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104/2134/2222/1511/1576/1576, CE n=184/189/229/183/200/256, Home n=244/232/273/243/267/275, Fashion n=442/442/460/490/441/477, Food n=564/613/516/0/0/0, Beauty n=401/394/409/480/529/443, Toys n=137/112/147/114/138/125, Jewellery n=133/152/187/0/0/0, 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: Netherlands. 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=2104, 18-24 n=250, 25-34 n=323, 35-44 n=315, 45-54 n=393, 55+ n=822, 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%	38%	3%
Offline purchase	8%	16%	16%

2024, Average across all verticals

	Online research only	**Online and offline research**	**Offline research only**
Online purchase	25%	28%	5%
Offline purchase	9%	17%	17%

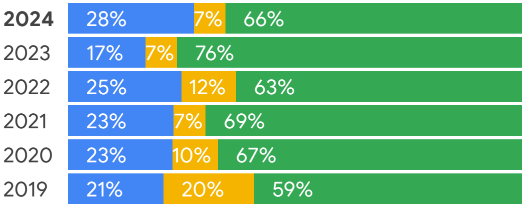
● Online ● Offline

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: Netherlands. 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=1552/1501, 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?

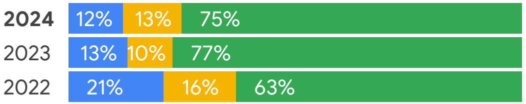
Purchase channel preferences & omni-channel importance

Consumer Electronics

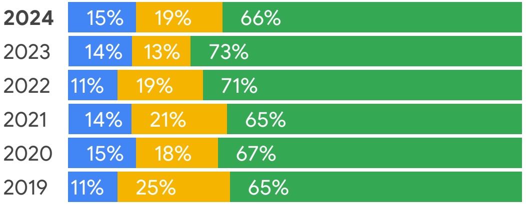


Food & Groceries

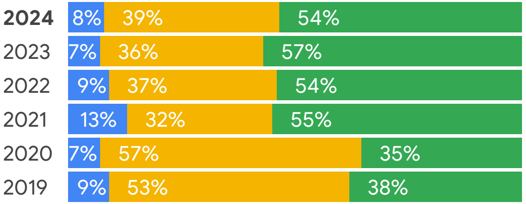
Jewellery



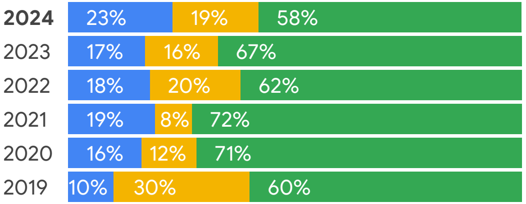
Home & Garden



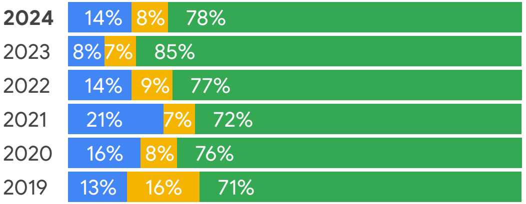
Beauty



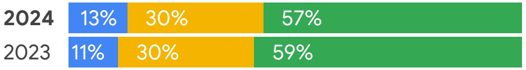
Fashion



Toys



AVERAGE OF ALL VERTICALS



● Online ● Offline ● Agnostic

Note: showing aggregated results

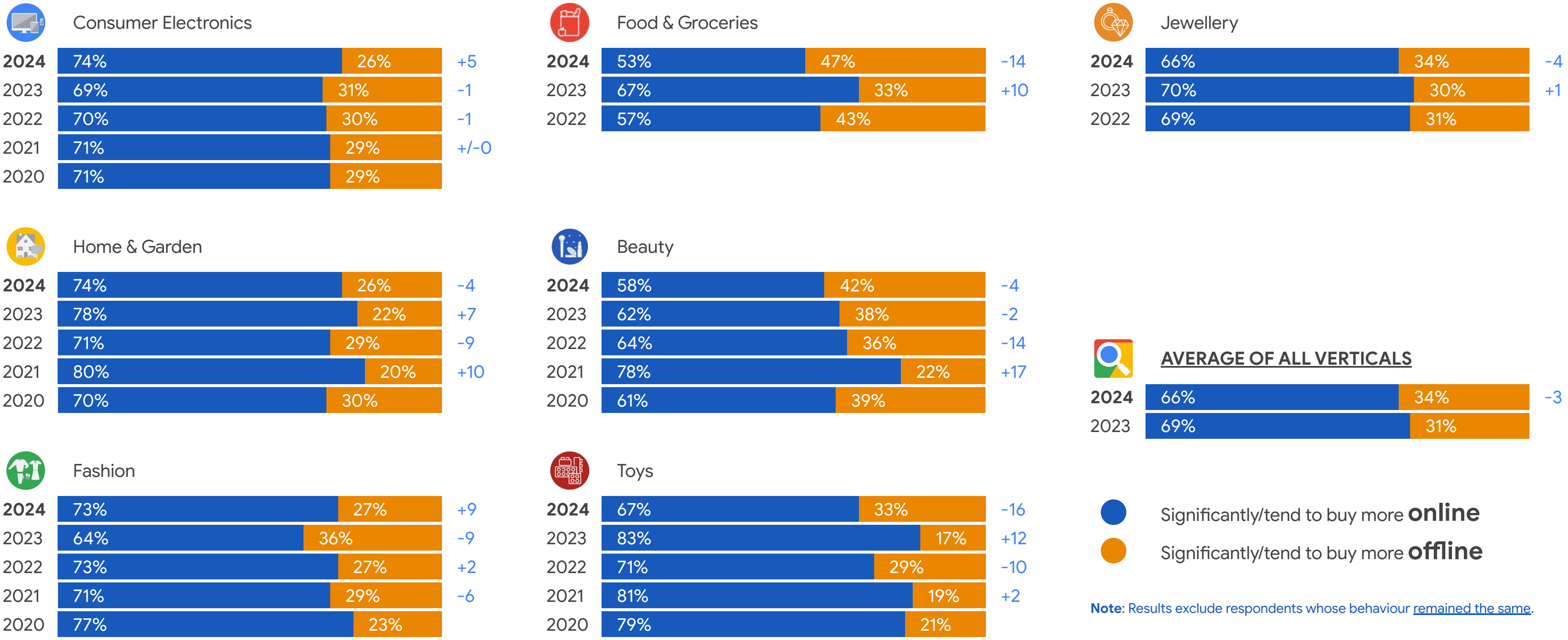
Online Preference - respondents who said that they always or almost always buy online in this category.

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: Netherlands. 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 2024/2023/2022/2021/2020/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104/2134/2222/1510/1576/1576, CE n=184/189/229/184/200/256, Home n=244/232/273/243/267/275, Fashion n=442/442/460/490/441/477, Food n=564/613/516/0/0/0, Beauty n=401/394/409/480/529/443, Toys n=137/112/147/113/138/125, Jewellery n=133/152/187/0/0/0, Q18. How frequently do you buy this category online, if at all?

Change of buying behaviour since 2020 covid pandemic



Consumer Electronics

2024	74%	26%	+5
2023	69%	31%	-1
2022	70%	30%	-1
2021	71%	29%	+/-0
2020	71%	29%	

Food & Groceries

2024	53%	47%	-14
2023	67%	33%	+10
2022	57%	43%	

Jewellery

2024	66%	34%	-4
2023	70%	30%	+1
2022	69%	31%	

Home & Garden

2024	74%	26%	-4
2023	78%	22%	+7
2022	71%	29%	-9
2021	80%	20%	+10
2020	70%	30%	

Beauty

2024	58%	42%	-4
2023	62%	38%	-2
2022	64%	36%	-14
2021	78%	22%	+17
2020	61%	39%	

Fashion

2024	73%	27%	+9
2023	64%	36%	-9
2022	73%	27%	+2
2021	71%	29%	-6
2020	77%	23%	

Toys

2024	67%	33%	-16
2023	83%	17%	+12
2022	71%	29%	-10
2021	81%	19%	+2
2020	79%	21%	

AVERAGE OF ALL VERTICALS

2024	66%	34%	-3
2023	69%	31%	

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

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

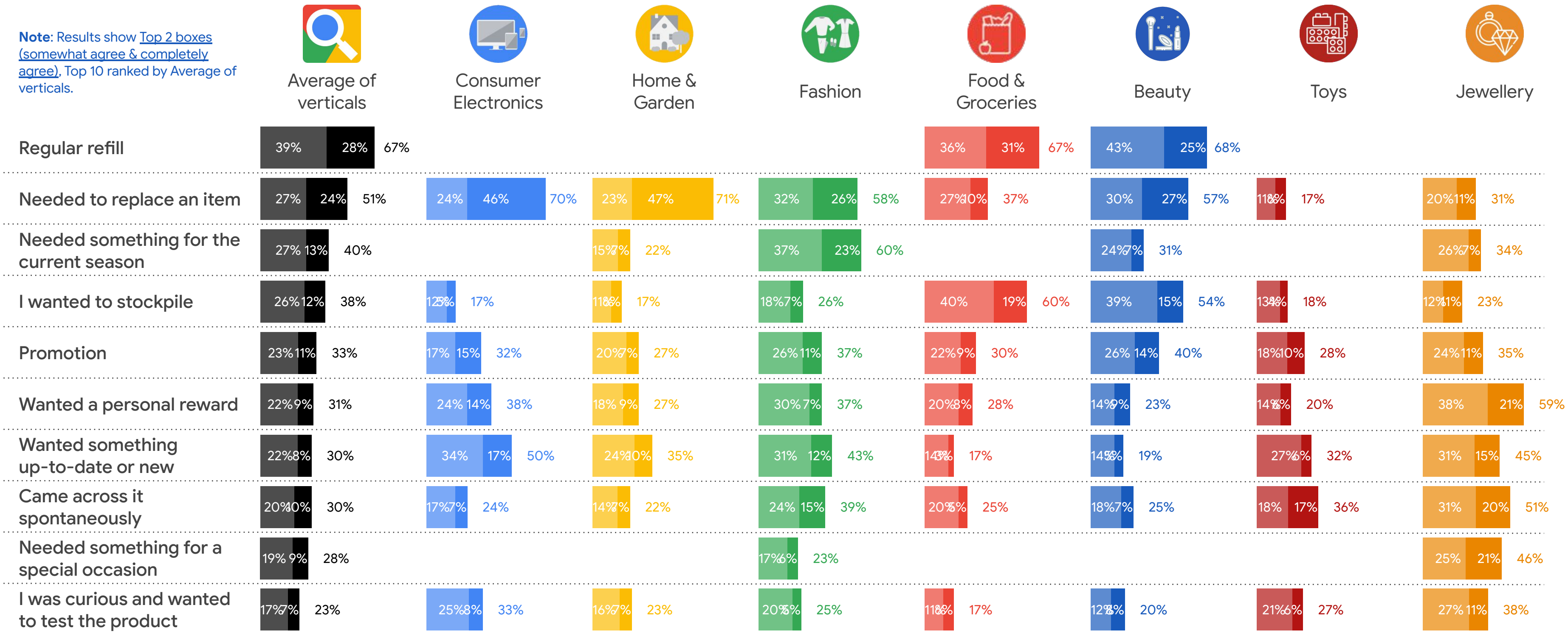
Note: Results exclude respondents whose behaviour remained the same.

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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 2024/2023/2022/2021/2020: Frequent online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=918/1027/1061/835/704, CE n=110/133/135/132/118, Home n=121/139/164/140/132, Fashion n=223/232/224/269/241, Food n=154/164/141/0/0, Beauty n=151/162/177/210/119, Toys n=77/79/99/83/93, Jewellery n=82/118/122/0/0, 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.



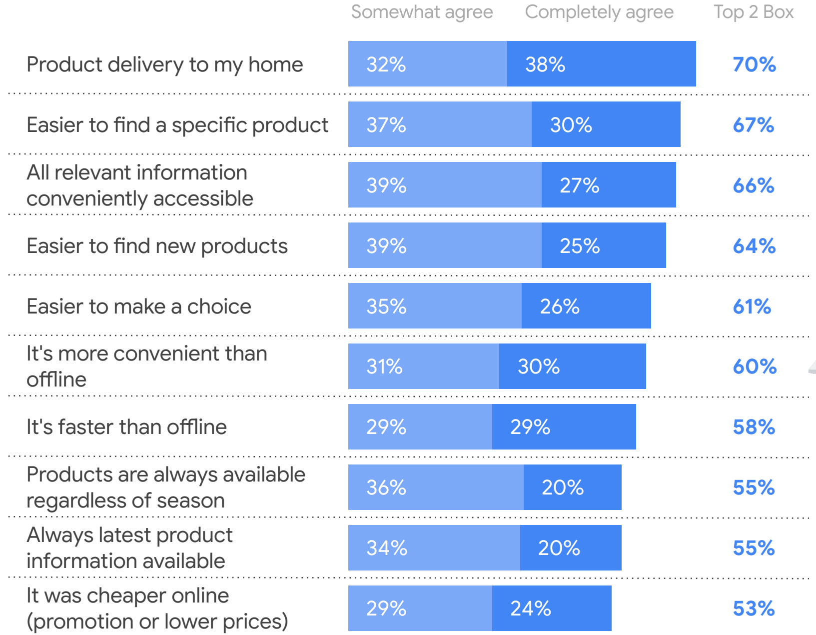
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104, CE n=184, Home n=244, Fashion n=442, Food n=564, Beauty n=401, Toys n=137, Jewellery n=133, 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

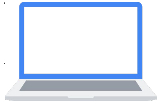
Note: Results show Top 2 boxes (somewhat agree & completely agree) across verticals, Top 10 drivers

2024

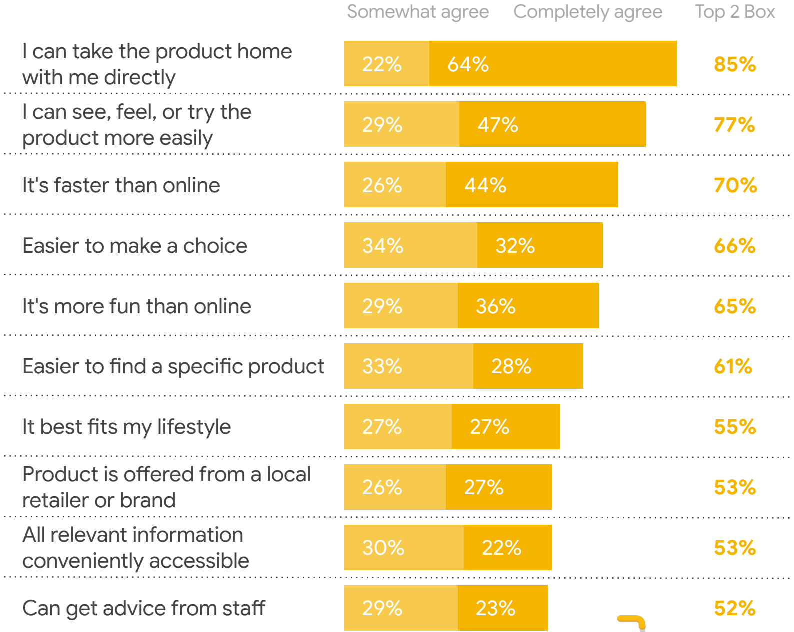
Top 10 online purchase drivers



	Somewhat agree	Completely agree	Top 2 Box
Product delivery to my home	32%	38%	70%
Easier to find a specific product	37%	30%	67%
All relevant information conveniently accessible	39%	27%	66%
Easier to find new products	39%	25%	64%
Easier to make a choice	35%	26%	61%
It's more convenient than offline	31%	30%	60%
It's faster than offline	29%	29%	58%
Products are always available regardless of season	36%	20%	55%
Always latest product information available	34%	20%	55%
It was cheaper online (promotion or lower prices)	29%	24%	53%



Top 10 offline purchase drivers



	Somewhat agree	Completely agree	Top 2 Box
I can take the product home with me directly	22%	64%	85%
I can see, feel, or try the product more easily	29%	47%	77%
It's faster than online	26%	44%	70%
Easier to make a choice	34%	32%	66%
It's more fun than online	29%	36%	65%
Easier to find a specific product	33%	28%	61%
It best fits my lifestyle	27%	27%	55%
Product is offered from a local retailer or brand	26%	27%	53%
All relevant information conveniently accessible	30%	22%	53%
Can get advice from staff	29%	23%	52%

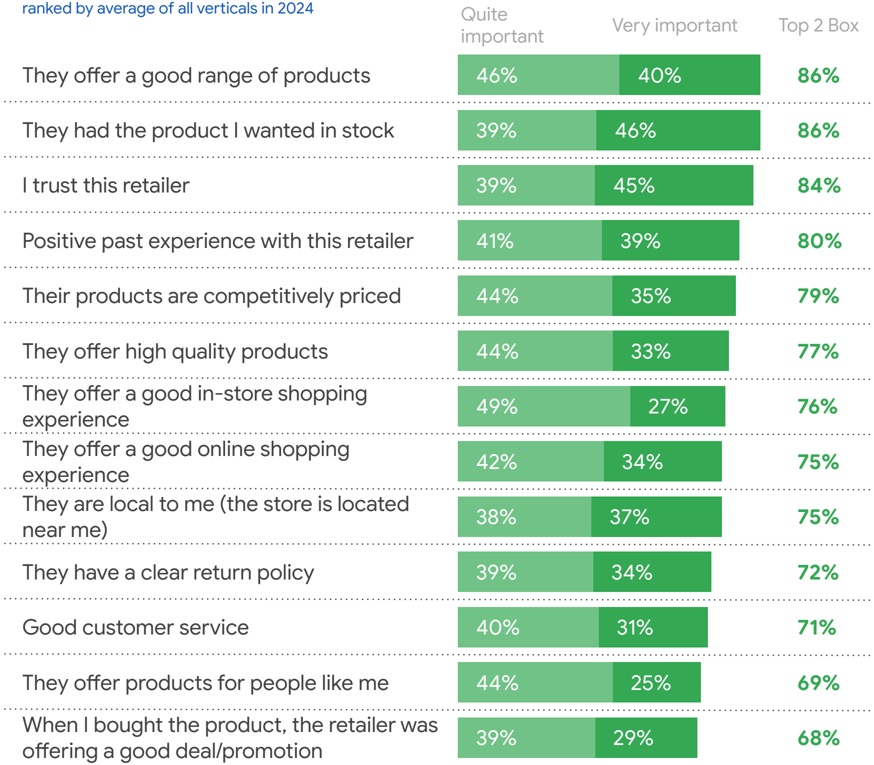
Note: In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104, Online n=1050, Offline n=1054, Q17_A, Q17_B: Why did you buy online / offline? How much do you agree or disagree with the following statements?

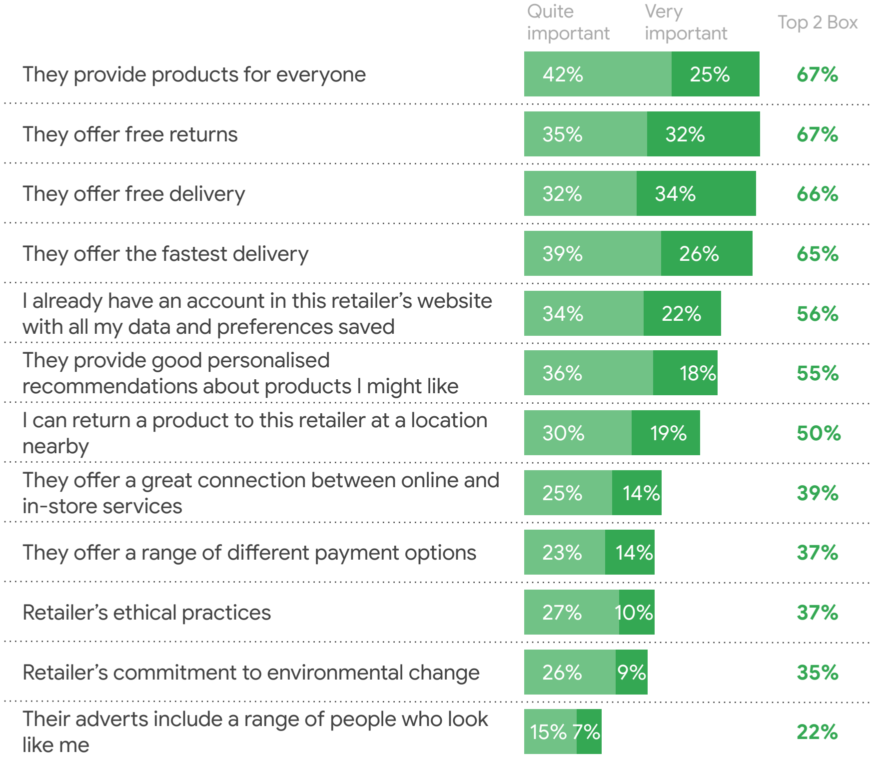
Reasons for retailer selection: avg. across verticals

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
They offer a good range of products	46%	40%	86%
They had the product I wanted in stock	39%	46%	86%
I trust this retailer	39%	45%	84%
Positive past experience with this retailer	41%	39%	80%
Their products are competitively priced	44%	35%	79%
They offer high quality products	44%	33%	77%
They offer a good in-store shopping experience	49%	27%	76%
They offer a good online shopping experience	42%	34%	75%
They are local to me (the store is located near me)	38%	37%	75%
They have a clear return policy	39%	34%	72%
Good customer service	40%	31%	71%
They offer products for people like me	44%	25%	69%
When I bought the product, the retailer was offering a good deal/promotion	39%	29%	68%

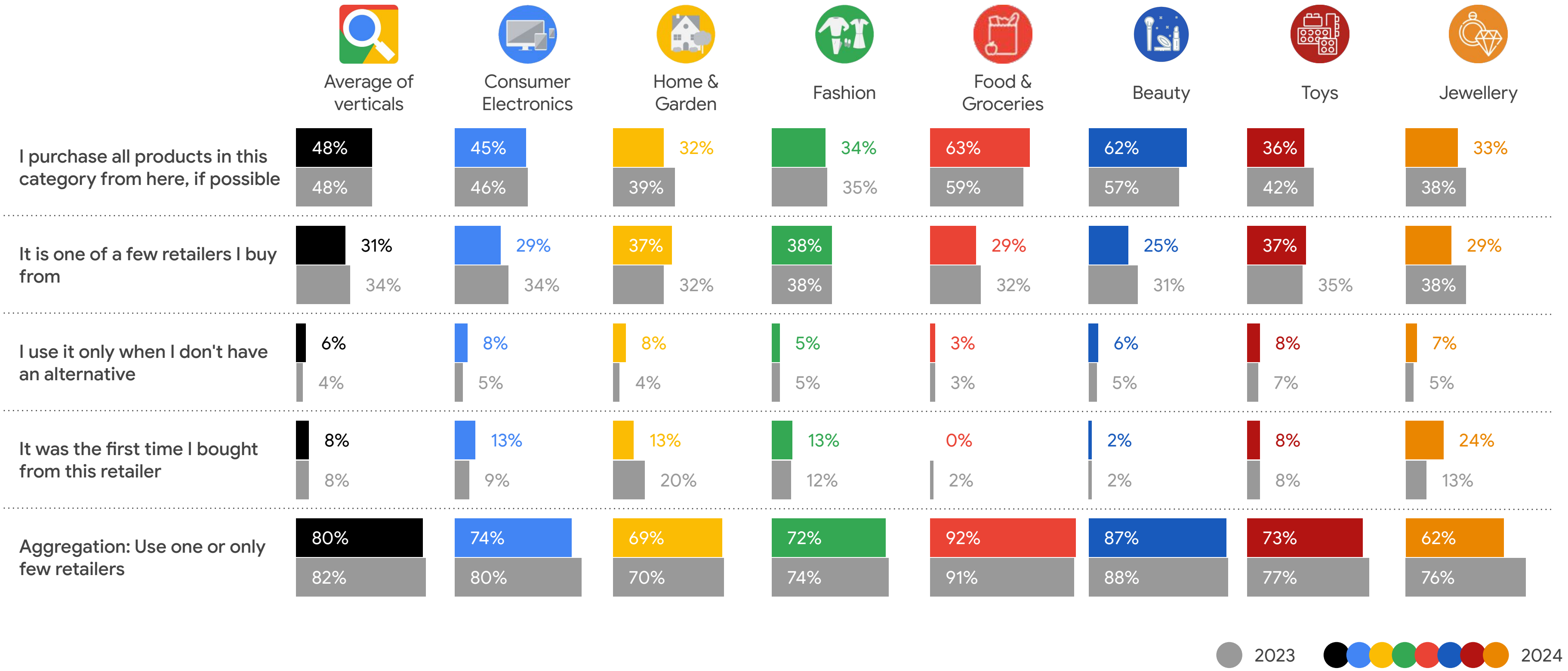


	Quite important	Very important	Top 2 Box
They provide products for everyone	42%	25%	67%
They offer free returns	35%	32%	67%
They offer free delivery	32%	34%	66%
They offer the fastest delivery	39%	26%	65%
I already have an account in this retailer's website with all my data and preferences saved	34%	22%	56%
They provide good personalised recommendations about products I might like	36%	18%	55%
I can return a product to this retailer at a location nearby	30%	19%	50%
They offer a great connection between online and in-store services	25%	14%	39%
They offer a range of different payment options	23%	14%	37%
Retailer's ethical practices	27%	10%	37%
Retailer's commitment to environmental change	26%	9%	35%
Their adverts include a range of people who look like me	15%	7%	22%

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: Netherlands. 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=2104, 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

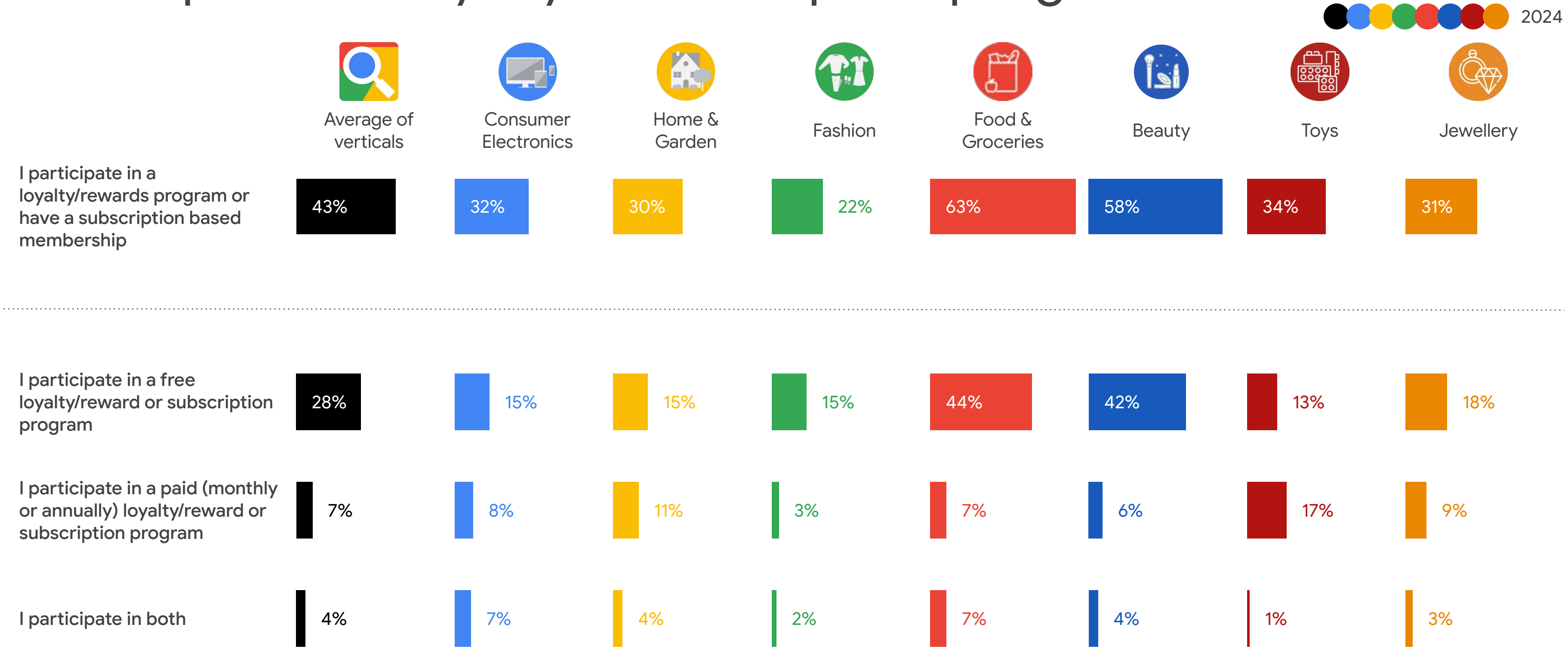


	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I purchase all products in this category from here, if possible	48% 48%	45% 46%	32% 39%	34% 35%	63% 59%	62% 57%	36% 42%	33% 38%
It is one of a few retailers I buy from	31% 34%	29% 34%	37% 32%	38% 38%	29% 32%	25% 31%	37% 35%	29% 38%
I use it only when I don't have an alternative	6% 4%	8% 5%	8% 4%	5% 5%	3% 3%	6% 5%	8% 7%	7% 5%
It was the first time I bought from this retailer	8% 8%	13% 9%	13% 20%	13% 12%	0% 2%	2% 2%	8% 8%	24% 13%
Aggregation: Use one or only few retailers	80% 82%	74% 80%	69% 70%	72% 74%	92% 91%	87% 88%	73% 77%	62% 76%

● 2023 ●●●●●●●● 2024

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104/2134, CE n=184/189, Home n=244/232, Fashion n=442/442, Food n=564/613, Beauty n=401/394, Toys n=137/112, Jewellery n=133/152, 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: Netherlands. 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=2104, CE n=184, Home n=244, Fashion n=442, Food n=564, Beauty n=401, Toys n=137, Jewellery n=133,
(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

Free loyalty/reward or subscription program

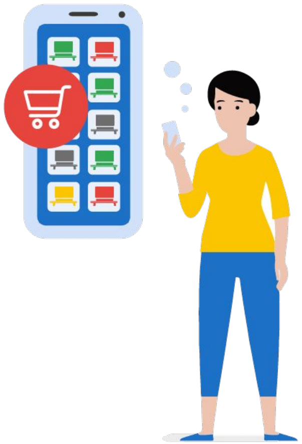
	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Very important/ important to me	55%	62%	56%	49%	53%	56%	57%	59%
Top 3 Reasons for participation	Discounts 76%	Discounts 71%	Discounts 76%	Discounts 71%	Discounts 80%	Discounts 76%	Discounts 72%	Discounts 60%
	Small gifts 41%	Free delivery 58%	Free delivery 51%	Free delivery 53%	Exclusive products 38%	Small gifts 58%	Exclusive products 46%	Free delivery 46%
	Exclusive products 37%	Free returns 52%	Fast delivery 39%	Small gifts 39%	Small gifts 33%	Exclusive products 34%	Small gifts 43%	Fast delivery 44%

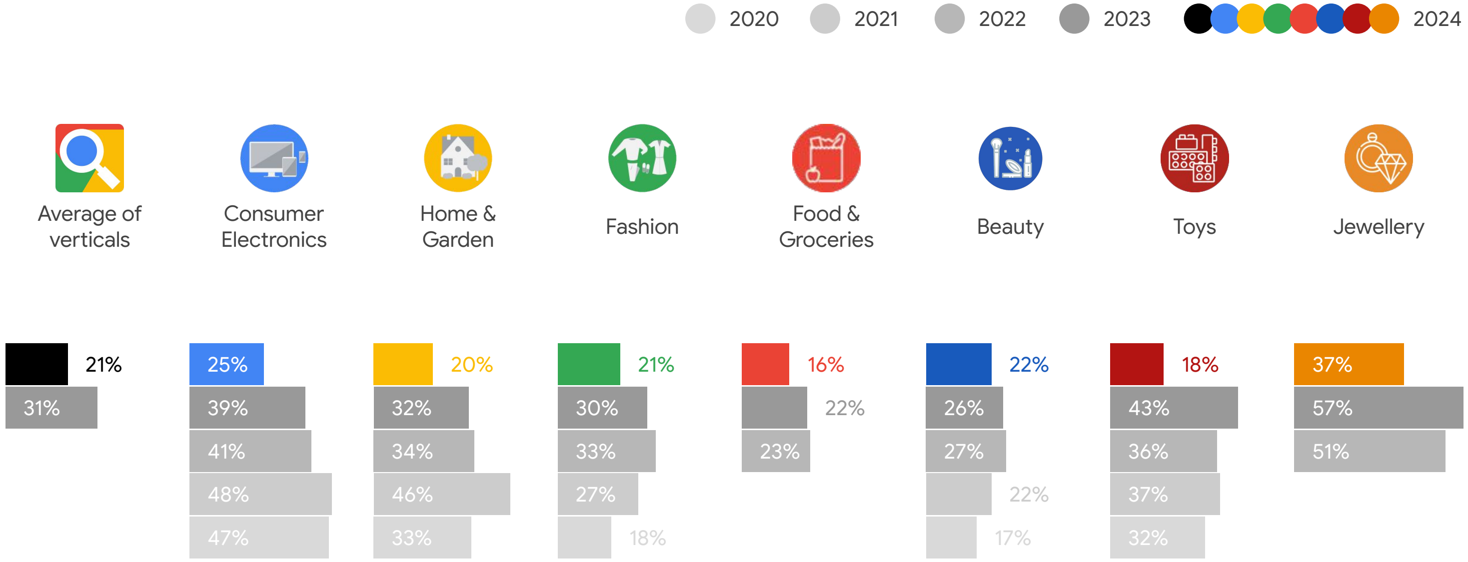
Paid loyalty/reward or subscription program

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Very important/ important to me	66%	63%	70%	72%	57%	66%	69%	85%
Top 3 Reasons for participation	Discounts 66%	Discounts 66%	Free delivery 75%	Free delivery 80%	Discounts 77%	Free delivery 83%	Free delivery 80%	Free delivery 48%
	Free delivery 56%	Free delivery 64%	Free returns 67%	Fast delivery 63%	Exclusive products 58%	Discounts 83%	Fast delivery 63%	Free returns 45%
	Fast delivery 45%	Fast delivery 47%	Discounts 62%	Free returns 54%	Small gifts 28%	Fast delivery 68%	Free returns 52%	Discounts 45%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=831, CE n=54, Home n=72, Fashion n=88, Food n=325, Beauty n=208, Toys n=44, Jewellery n=39,
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

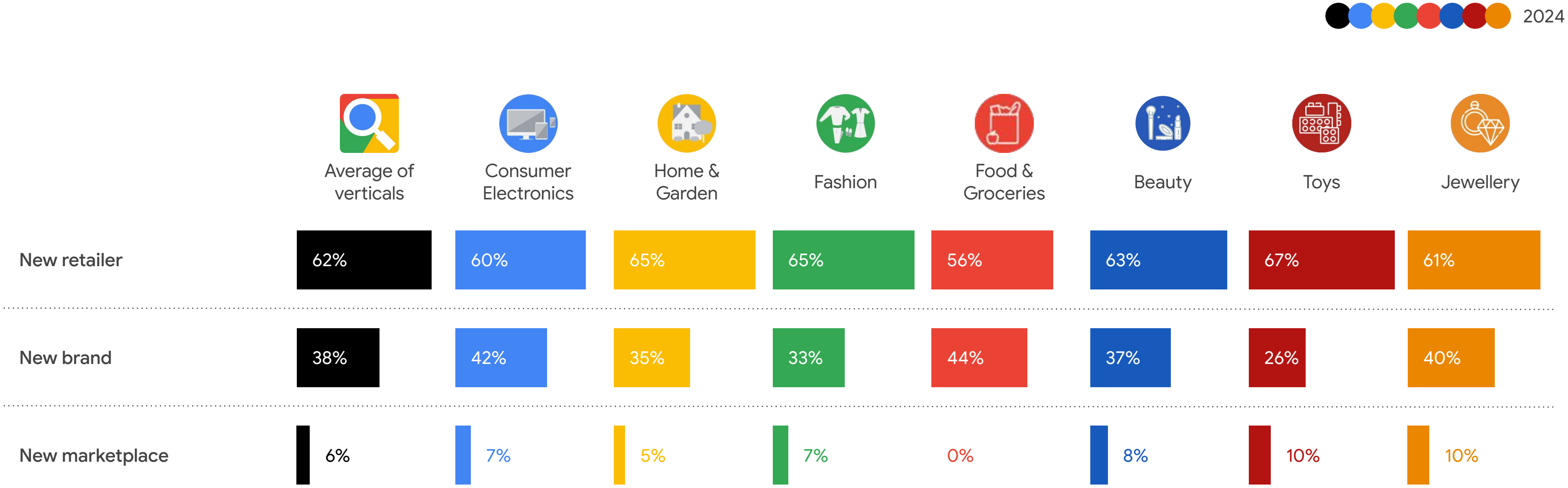




Note: Purchases made in the last 4 weeks from a retailer, a platform or brand never shopped with before

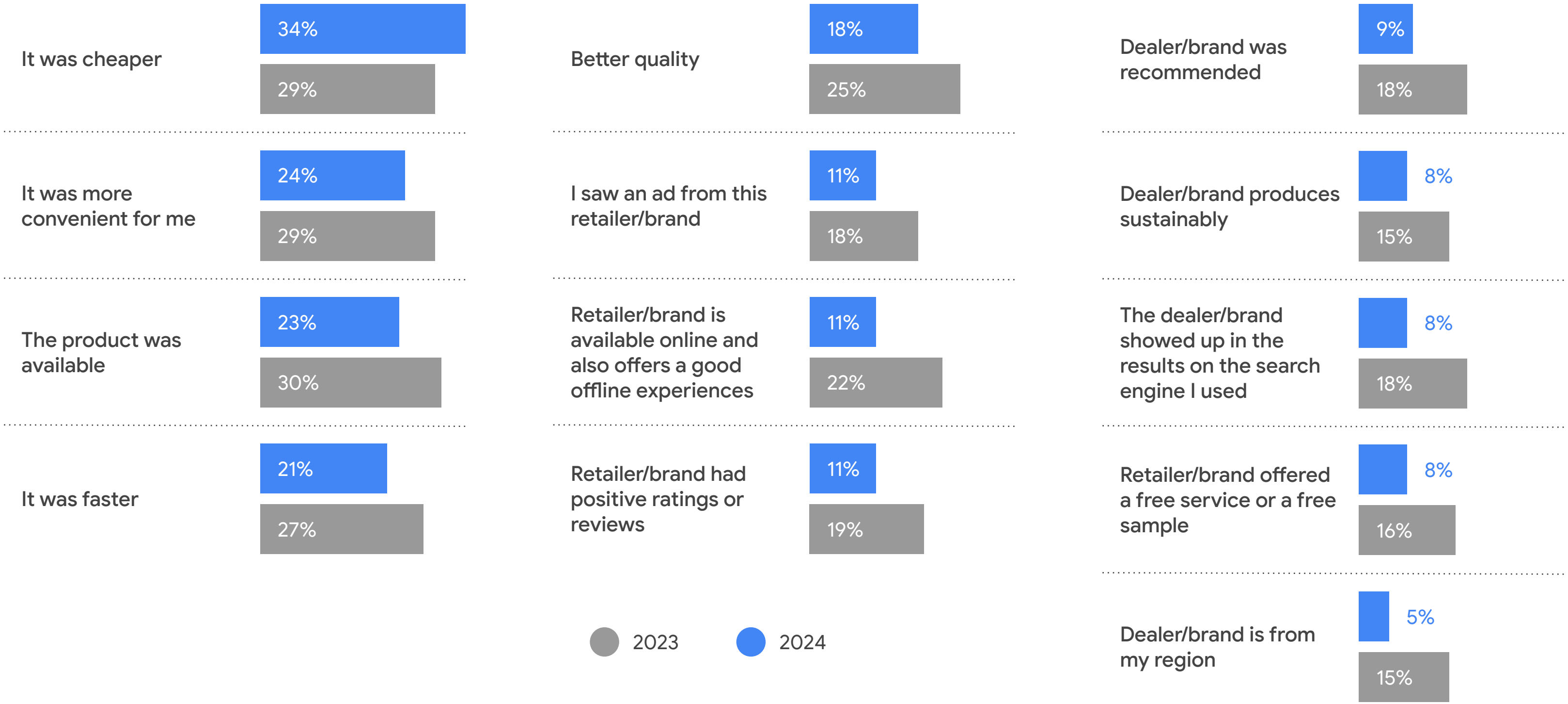
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021/2020: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104/2134/2222/1511/1576, CE n=184/189/229/183/200, Home n=244/232/273/243/267, Fashion n=442/442/460/490/441, Food n=564/613/516/0/0, Beauty n=401/394/409/480/529, Toys n=137/112/147/114/138, Jewellery n=133/152/187/0/0, 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



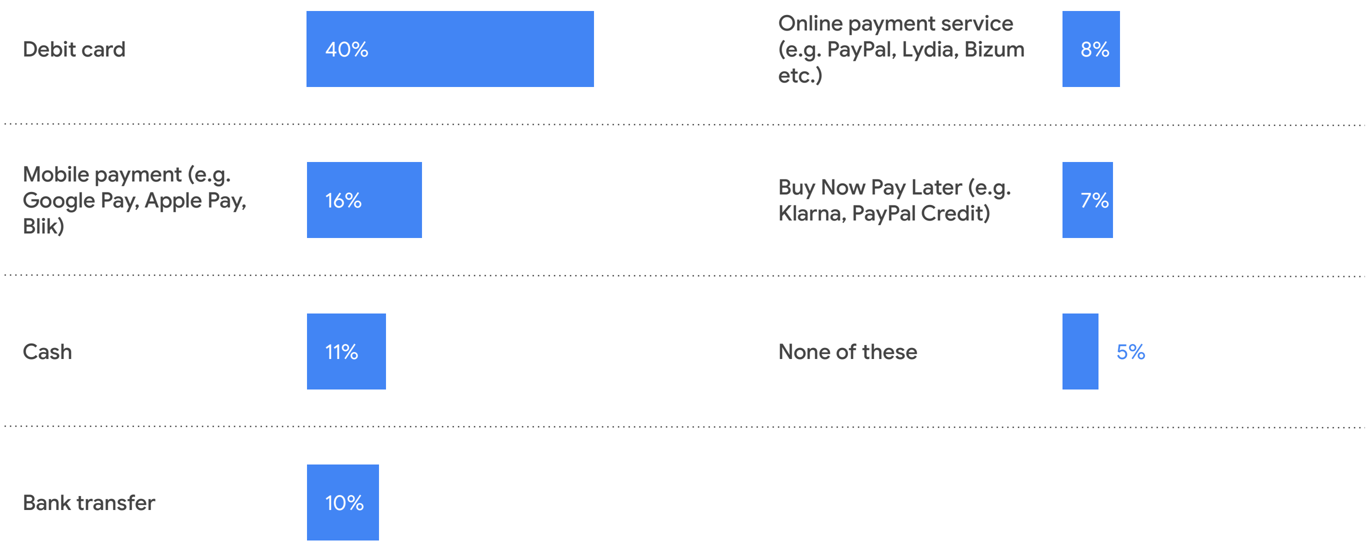
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=442, CE n=45, Home n=49, Fashion n=92, Food n=93, Beauty n=90, Toys n=24, Jewellery n=48, 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: Netherlands. 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=442/656, 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

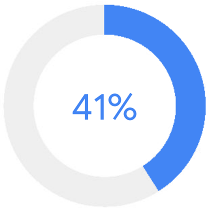


Note: Results show Average of verticals

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104, Q43: Thinking again about the last product within the category that you bought, how did you pay for the product?

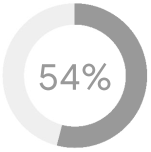
Online buyers: respondents experiencing pain points

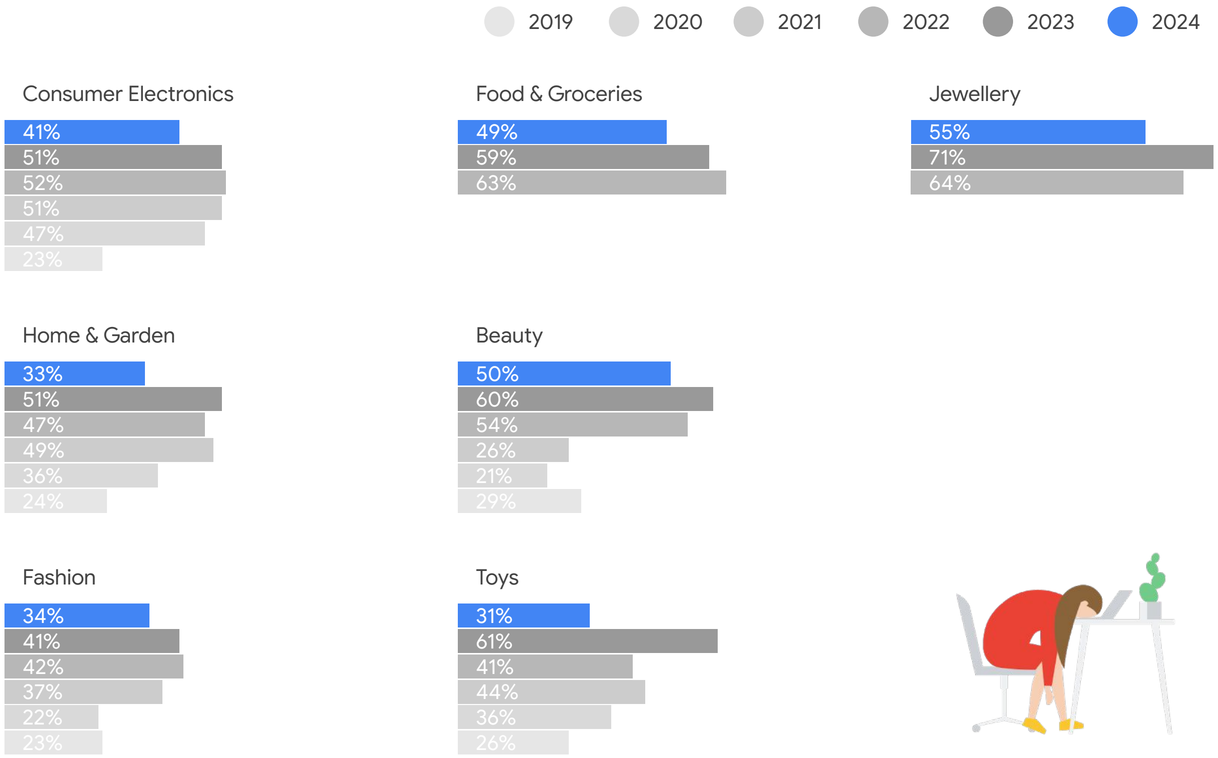
2024



AVERAGE OF VERTIALS

2023

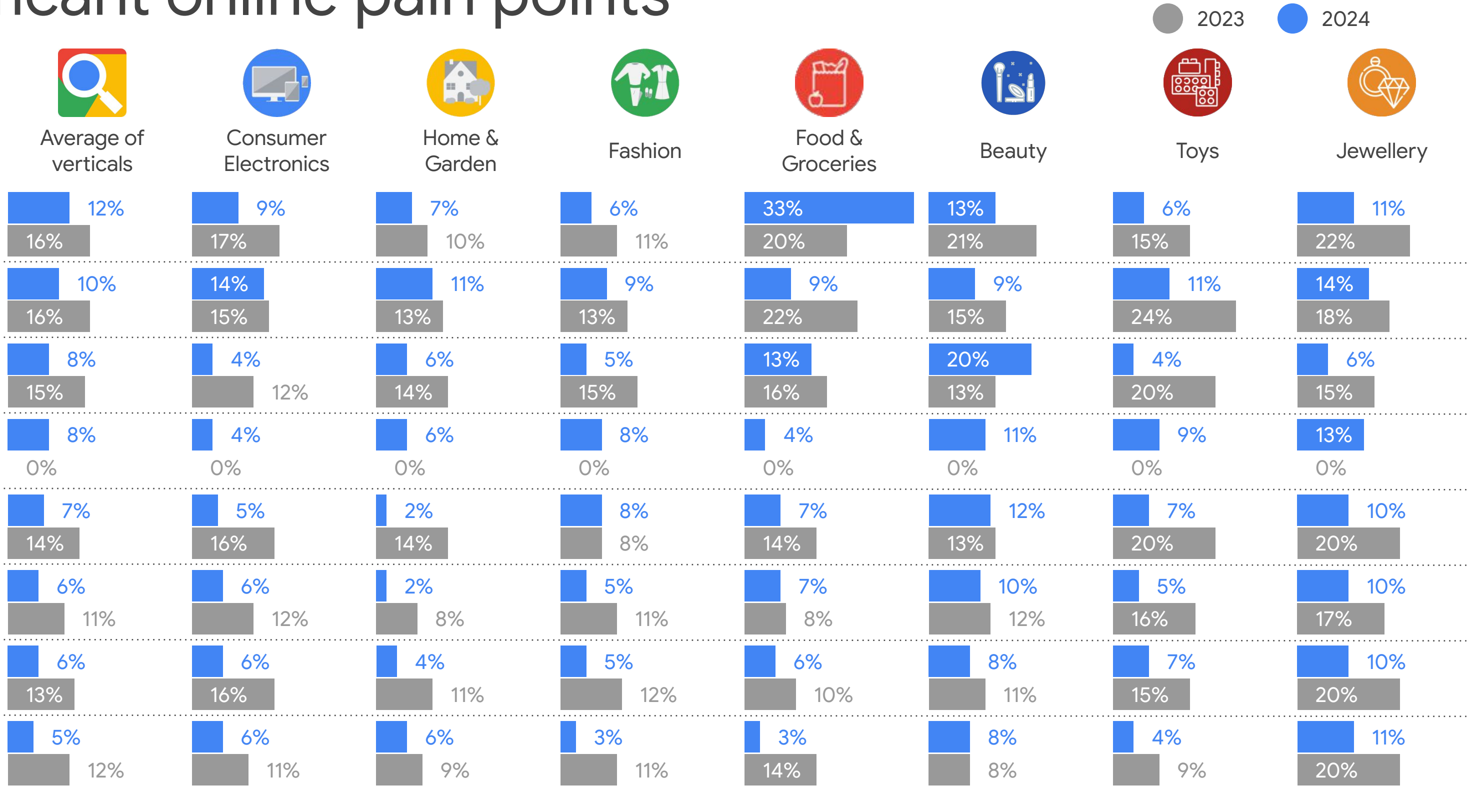




Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021/2020/2019: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1050/1052/982/617/730/574, CE n=138/144/155/109/124/145, Home n=146/149/148/102/138/118, Fashion n=290/276/251/232/295/173, Food n=152/153/102/0/0/0, Beauty n=154/150/139/124/94/83, Toys n=80/71/73/50/77/54, Jewellery n=89/109/114/0/0/0, Q4: Which of these situations did you experience during your purchase, if any?

Most significant online pain points

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

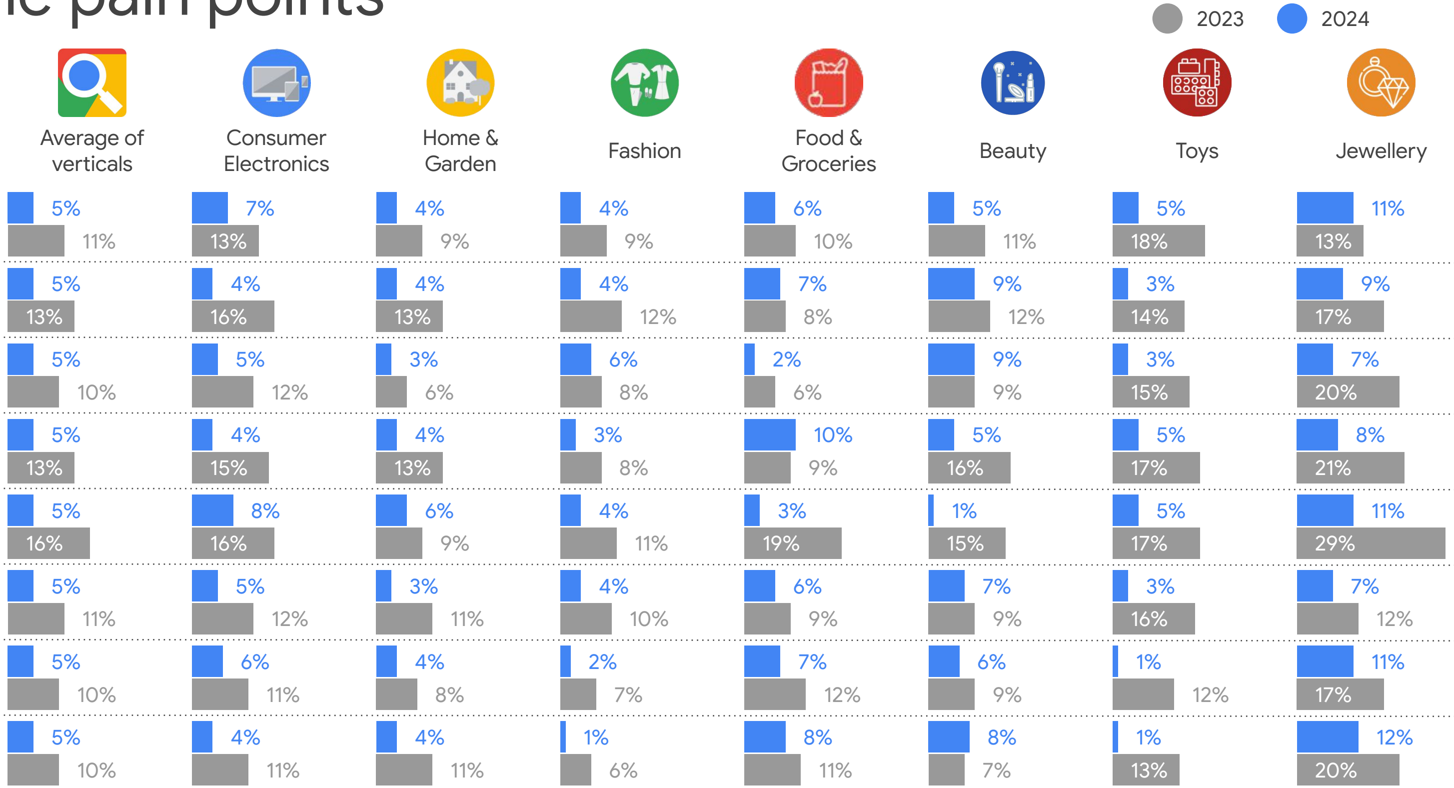


	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The product has become more expensive recently	12% 16%	9% 17%	7% 10%	6% 11%	33% 20%	13% 21%	6% 15%	11% 22%
I couldn't buy without registering or without logging in	10% 16%	14% 15%	11% 13%	9% 13%	9% 22%	9% 15%	11% 24%	14% 18%
The product I wanted wasn't available	8% 15%	4% 12%	6% 14%	5% 15%	13% 16%	20% 13%	4% 20%	6% 15%
Return of product wasn't free or it was too expensive	8% 0%	4% 0%	6% 0%	8% 0%	4% 0%	11% 0%	9% 0%	13% 0%
I couldn't find the product for my needs quickly	7% 14%	5% 16%	2% 14%	8% 8%	7% 14%	12% 13%	7% 20%	10% 20%
Return policy wasn't clear enough	6% 11%	6% 12%	2% 8%	5% 11%	7% 8%	10% 12%	5% 16%	10% 17%
They didn't offer an option to return a product at a location nearby	6% 13%	6% 16%	4% 11%	5% 12%	6% 10%	8% 11%	7% 15%	10% 20%
I didn't have time to do sufficient product research	5% 12%	6% 11%	6% 9%	3% 11%	3% 14%	8% 8%	4% 9%	11% 20%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=1050/1052, CE n=138/144, Home n=146/149, Fashion n=290/276, Food n=152/153, Beauty n=154/150, Toys n=80/71, Jewellery n=89/109, Q4: Which of these situations did you experience during your purchase, if any?

Other online pain points

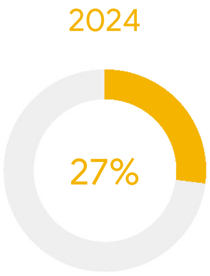
Note: Other online pain points, results ranked by Average of verticals.



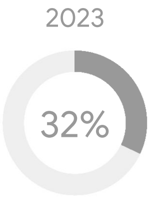
	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I couldn't find sufficient information on the product	5% 11%	7% 13%	4% 9%	4% 9%	6% 10%	5% 11%	5% 18%	11% 13%
The purchase process was interrupted due to a technical issue	5% 13%	4% 16%	4% 13%	4% 12%	7% 8%	9% 12%	3% 14%	9% 17%
Pricing wasn't clear enough	5% 10%	5% 12%	3% 6%	6% 8%	2% 6%	9% 9%	3% 15%	7% 20%
Response time of customer support was too slow	5% 13%	4% 15%	4% 13%	3% 8%	10% 9%	5% 16%	5% 17%	8% 21%
Independent product reviews were hard to find	5% 16%	8% 16%	6% 9%	4% 11%	3% 19%	1% 15%	5% 17%	11% 29%
My preferred payment method was not available	5% 11%	5% 12%	3% 11%	4% 10%	6% 9%	7% 9%	3% 16%	7% 12%
I needed support and couldn't contact anyone	5% 10%	6% 11%	4% 8%	2% 7%	7% 12%	6% 9%	1% 12%	11% 17%
Delivery fees or options weren't clear enough	5% 10%	4% 11%	4% 11%	1% 6%	8% 11%	8% 7%	1% 13%	12% 20%

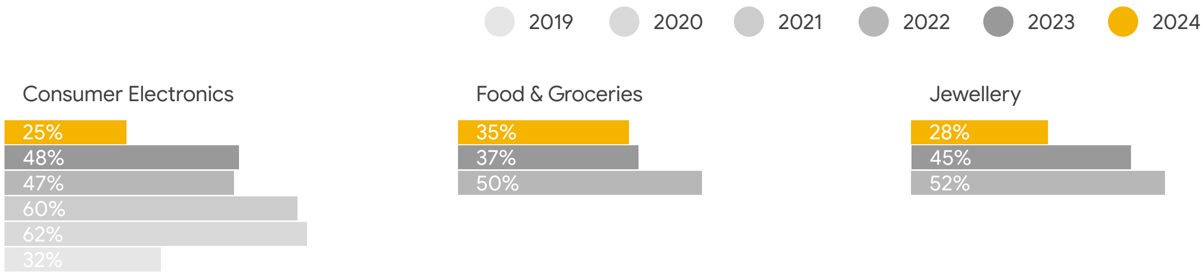
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1050/1052, CE n=138/144, Home n=146/149, Fashion n=290/276, Food n=152/153, Beauty n=154/150, Toys n=80/71, Jewellery n=89/109, Q4: Which of these situations did you experience during your purchase, if any?

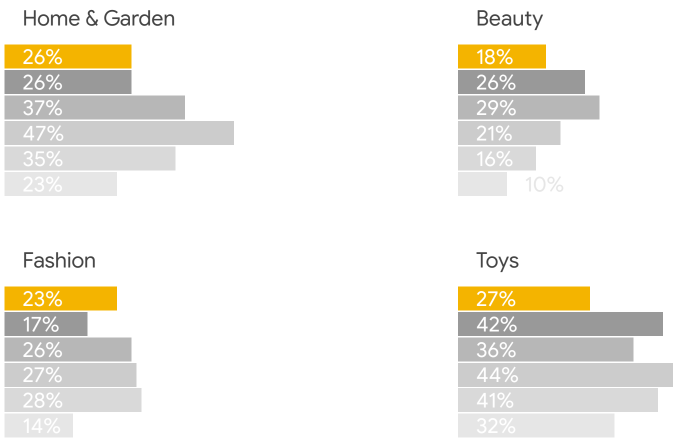
Offline buyers: respondents experiencing pain points



AVERAGE OF VERTIALS





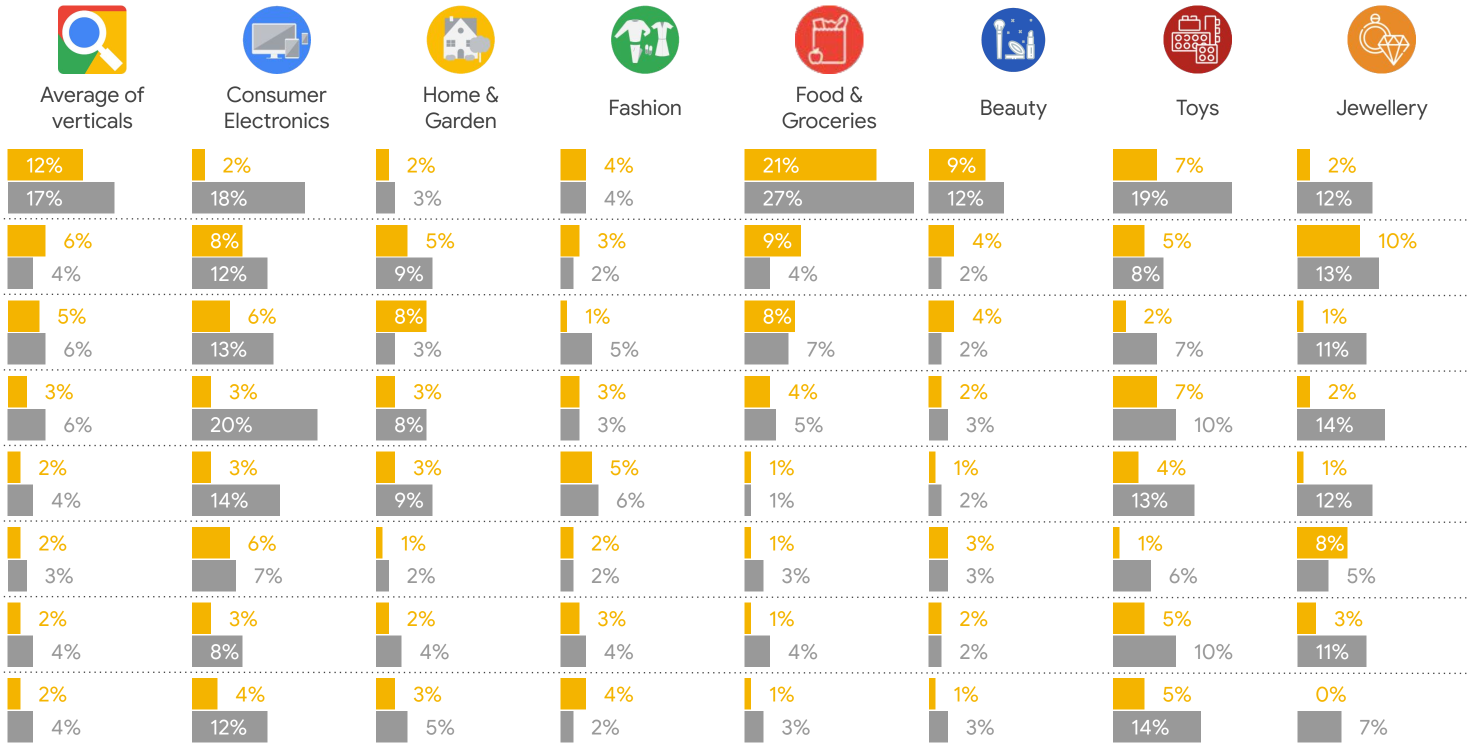


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021/2020/2019: Offline buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1054/1082/1240/894/846/1002, CE n=46/45/74/74/76/111, Home n=97/83/125/141/129/157, Fashion n=151/166/209/258/146/304, Food n=412/460/414/0/0/0, Beauty n=247/244/270/356/435/360, Toys n=57/41/75/64/61/71, Jewellery n=44/43/72/0/0/0, 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.

● 2023 ● 2024

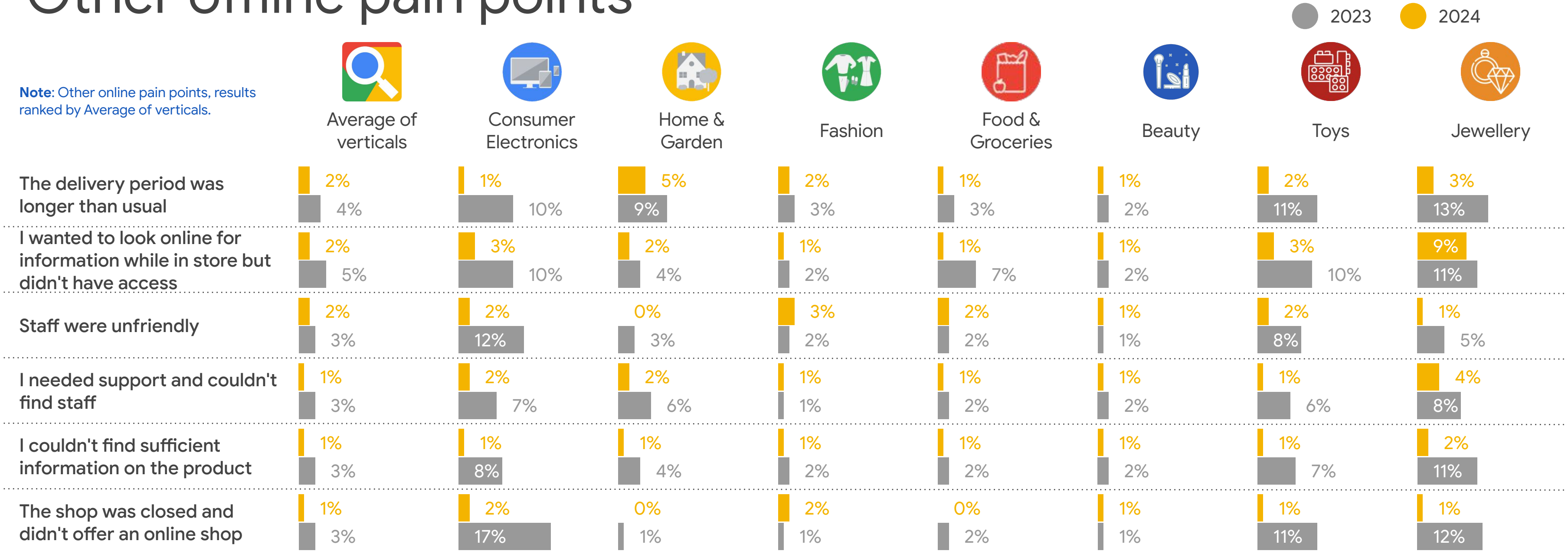


	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The product has become more expensive recently	12% 17%	2% 18%	2% 3%	4% 4%	21% 27%	9% 12%	7% 19%	2% 12%
I couldn't find the product for my needs quickly	6% 4%	8% 12%	5% 9%	3% 2%	9% 4%	4% 2%	5% 8%	10% 13%
The product I wanted wasn't available	5% 6%	6% 13%	8% 3%	1% 5%	8% 7%	4% 2%	2% 7%	1% 11%
Check out took too long / lines at check out	3% 6%	3% 20%	3% 8%	3% 3%	4% 5%	2% 3%	7% 10%	2% 14%
There were no delivery options	2% 4%	3% 14%	3% 9%	5% 6%	1% 1%	1% 2%	4% 13%	1% 12%
Pricing wasn't clear enough	2% 3%	6% 7%	1% 2%	2% 2%	1% 3%	3% 3%	1% 6%	8% 5%
No service, no consultancy in the store	2% 4%	3% 8%	2% 4%	3% 4%	1% 4%	2% 2%	5% 10%	3% 11%
I didn't have time to do sufficient product research	2% 4%	4% 12%	3% 5%	4% 2%	1% 3%	1% 3%	5% 14%	0% 7%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=1054/1082, CE n=46/45, Home n=97/83, Fashion n=151/166, Food n=412/460, Beauty n=247/244, Toys n=57/41, Jewellery n=44/43, Q4: Which of these situations did you experience during your purchase, if any?

Other offline pain points

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

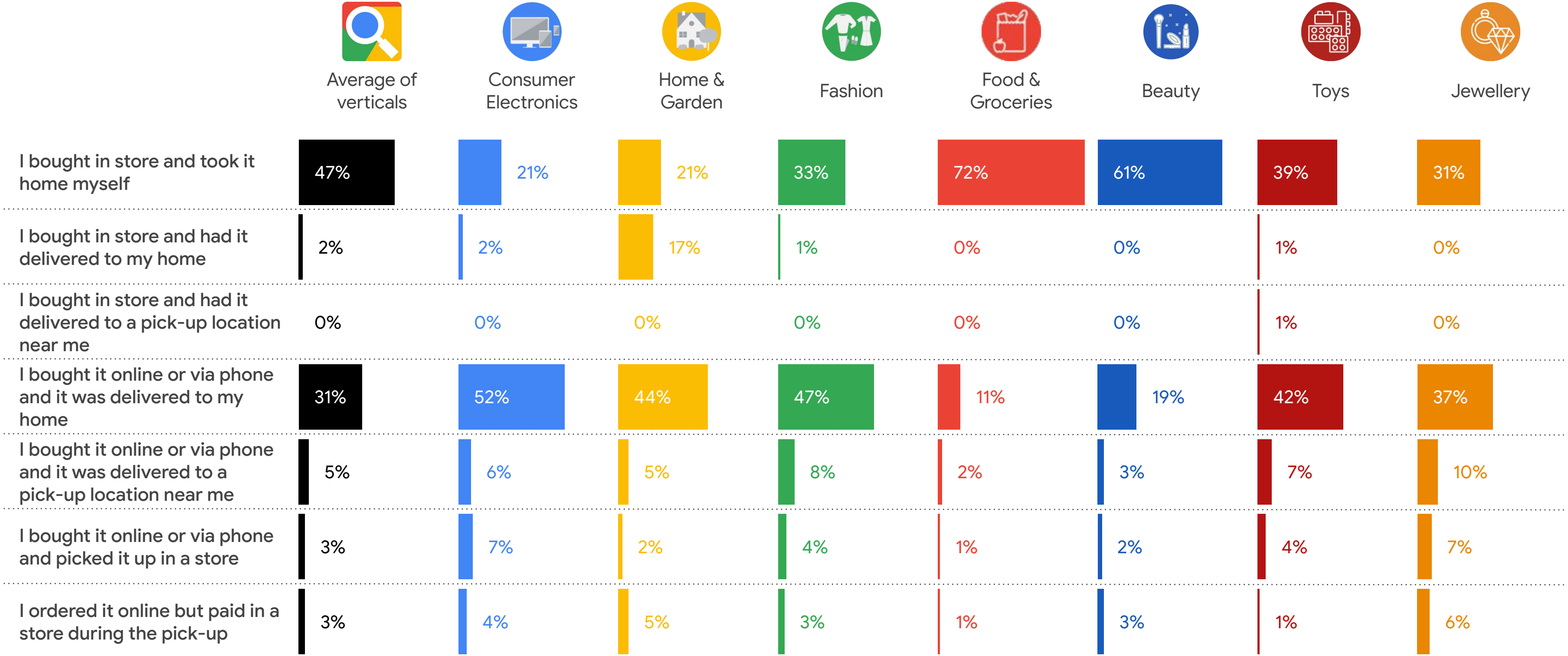


		Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The delivery period was longer than usual	2024	2%	1%	5%	2%	1%	1%	2%	3%
	2023	4%	10%	9%	3%	3%	2%	11%	13%
I wanted to look online for information while in store but didn't have access	2024	2%	3%	2%	1%	1%	1%	3%	9%
	2023	5%	10%	4%	2%	7%	2%	10%	11%
Staff were unfriendly	2024	2%	2%	0%	3%	2%	1%	2%	1%
	2023	3%	12%	3%	2%	2%	1%	8%	5%
I needed support and couldn't find staff	2024	1%	2%	2%	1%	1%	1%	1%	4%
	2023	3%	7%	6%	1%	2%	2%	6%	8%
I couldn't find sufficient information on the product	2024	1%	1%	1%	1%	1%	1%	1%	2%
	2023	3%	8%	4%	2%	2%	2%	7%	11%
The shop was closed and didn't offer an online shop	2024	1%	2%	0%	2%	0%	1%	1%	1%
	2023	3%	17%	1%	1%	2%	1%	11%	12%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=1054/1082, CE n=46/45, Home n=97/83, Fashion n=151/166, Food n=412/460, Beauty n=247/244, Toys n=57/41, Jewellery n=44/43, Q4: Which of these situations did you experience during your purchase, if any?

Ways of obtaining the product

2024

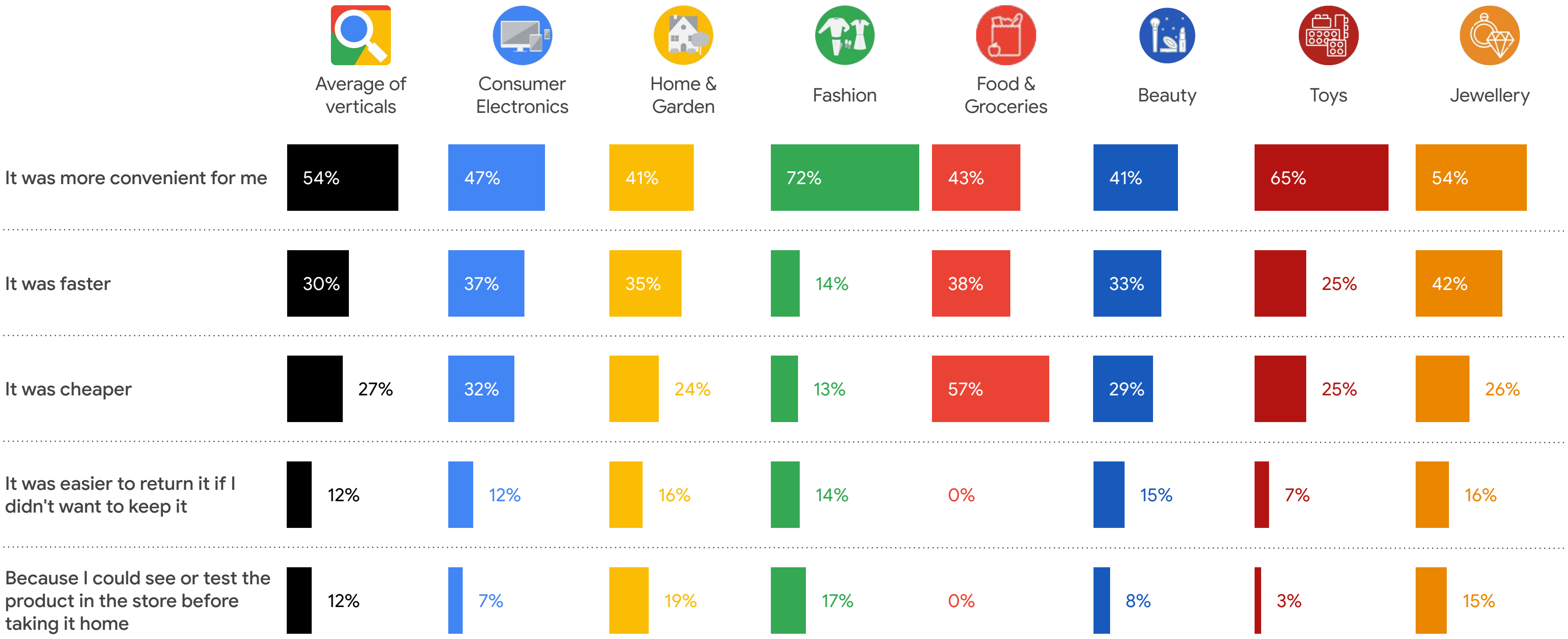


	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
I bought in store and took it home myself	47%	21%	21%	33%	72%	61%	39%	31%
I bought in store and had it delivered to my home	2%	2%	17%	1%	0%	0%	1%	0%
I bought in store and had it delivered to a pick-up location near me	0%	0%	0%	0%	0%	0%	1%	0%
I bought it online or via phone and it was delivered to my home	31%	52%	44%	47%	11%	19%	42%	37%
I bought it online or via phone and it was delivered to a pick-up location near me	5%	6%	5%	8%	2%	3%	7%	10%
I bought it online or via phone and picked it up in a store	3%	7%	2%	4%	1%	2%	4%	7%
I ordered it online but paid in a store during the pick-up	3%	4%	5%	3%	1%	3%	1%	6%

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104, CE n=184, Home n=244, Fashion n=442, Food n=564, Beauty n=401, Toys n=137, Jewellery n=133, Q2_A. How did you get the product?

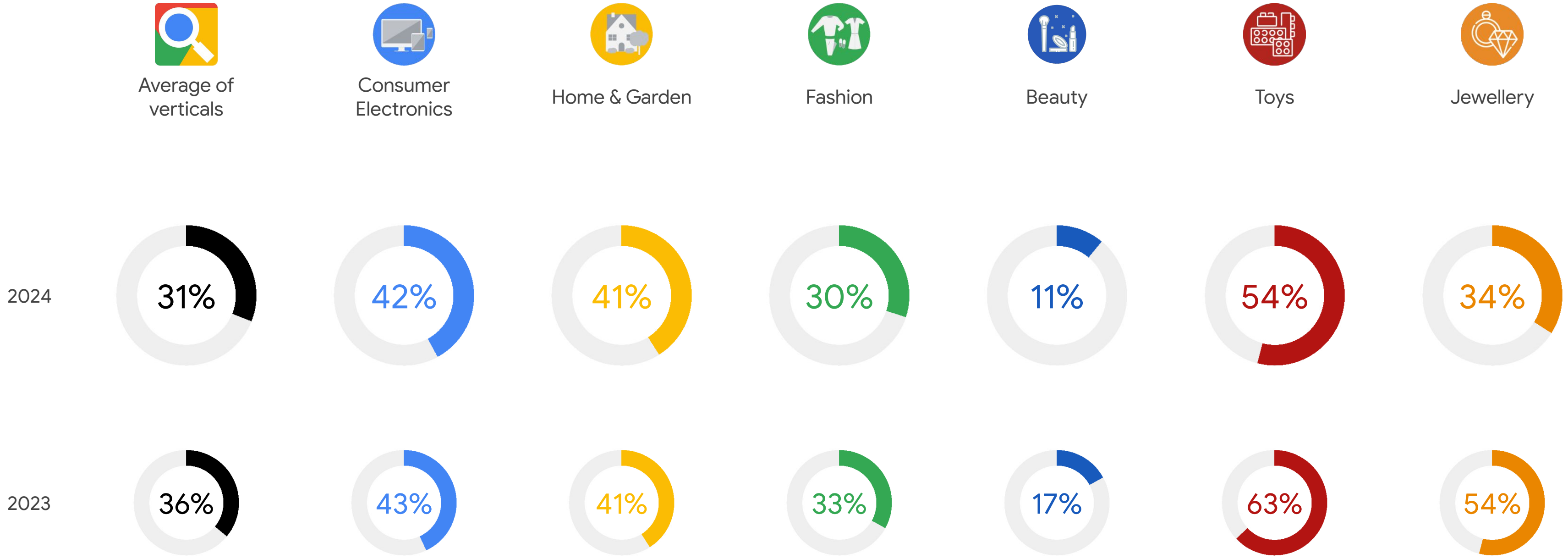
Reasons for pick-up in-store or at a pick-up location

2024



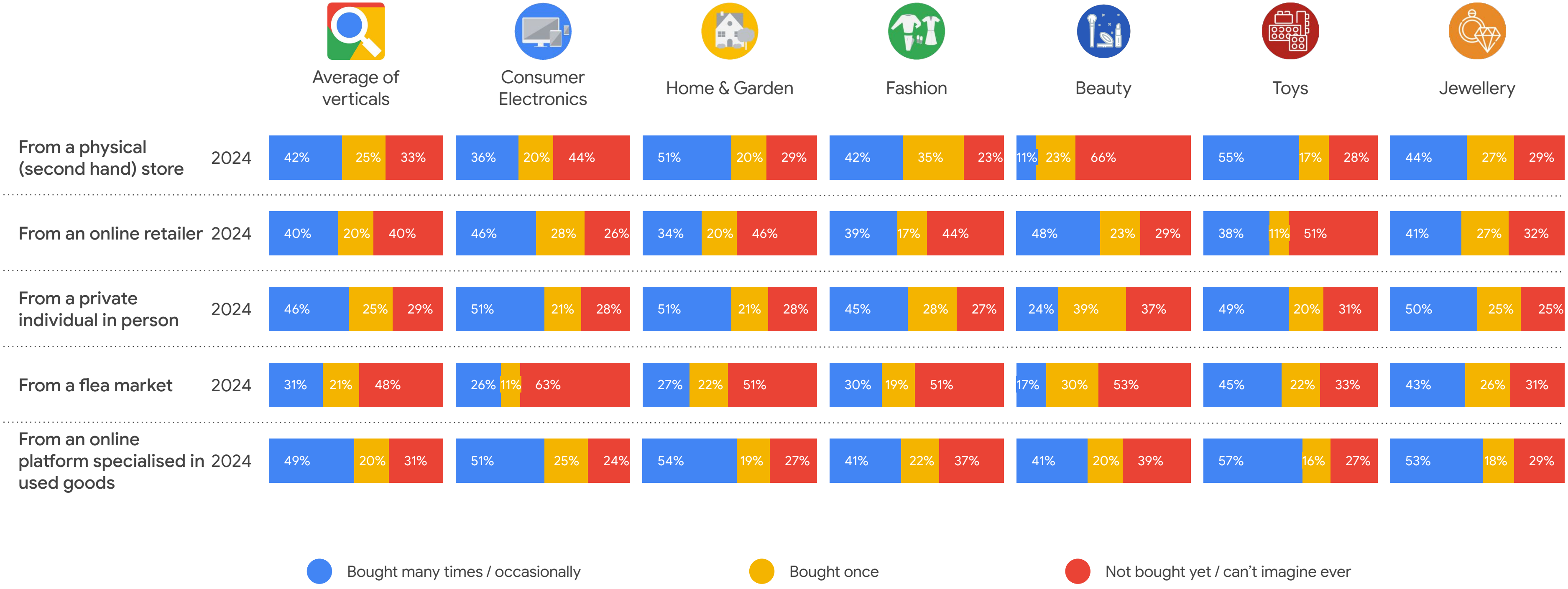
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=232, CE n=32, Home n=31, Fashion n=62, Food n=23, Beauty n=36, Toys n=18, Jewellery n=31, 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: Netherlands. 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=1540/1521, CE n=184/189, Home n=244/232, Fashion n=442/442, Beauty n=401/394, Toys n=137/112, Jewellery n=133/152, 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

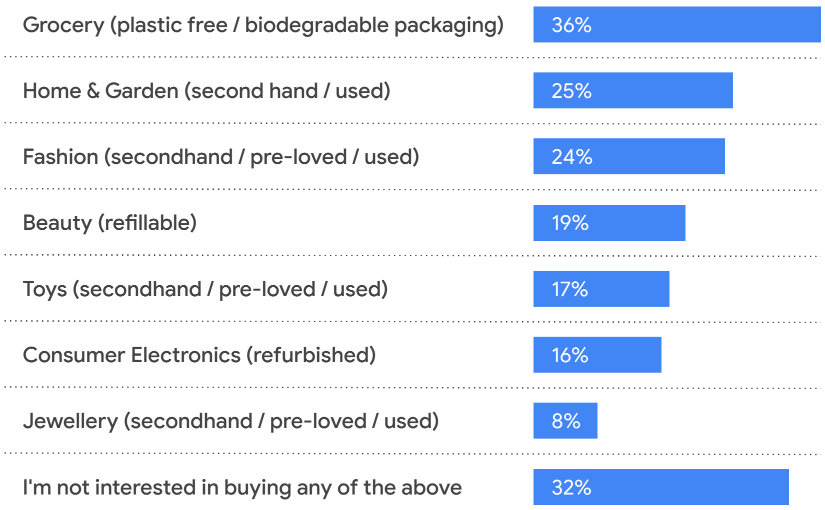


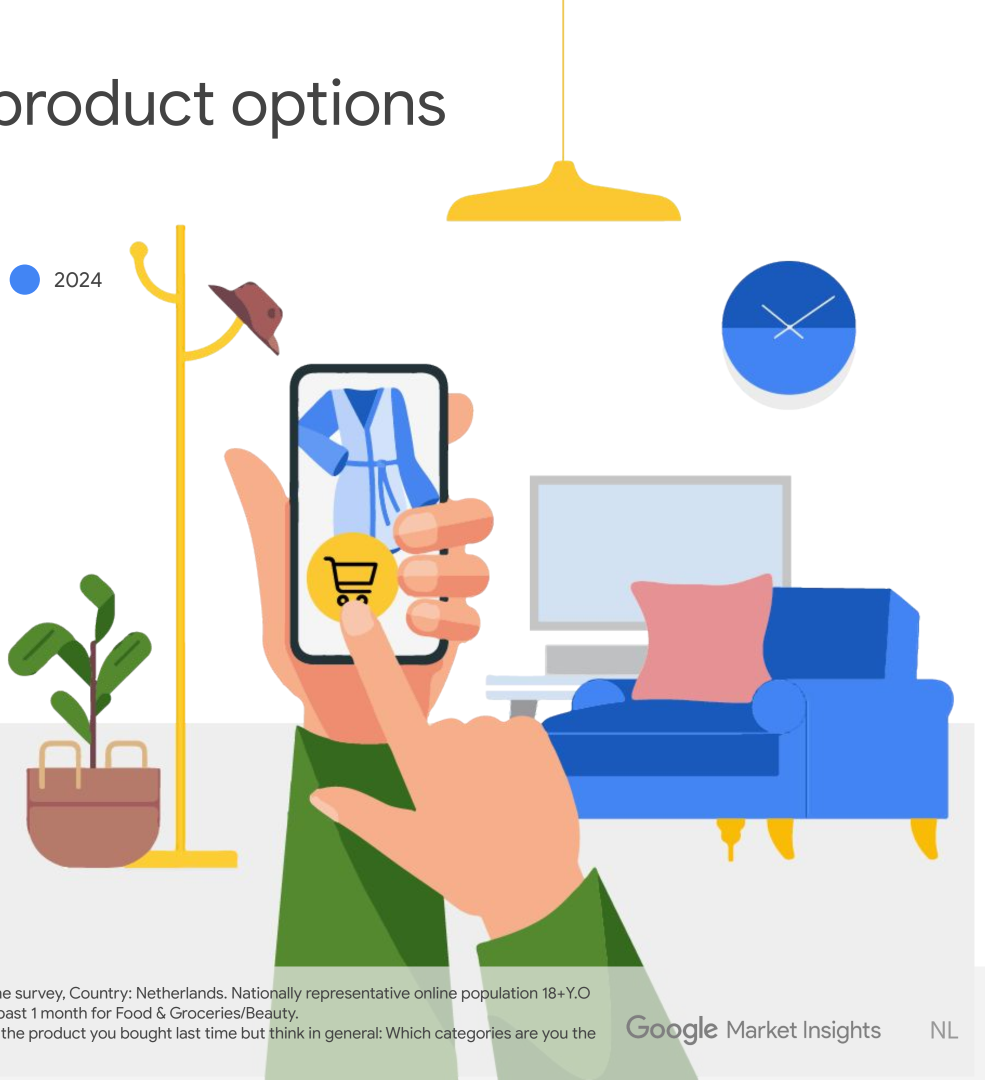
		Average of verticals	Consumer Electronics	Home & Garden	Fashion	Beauty	Toys	Jewellery
From a physical (second hand) store	2024	42% 25% 33%	36% 20% 44%	51% 20% 29%	42% 35% 23%	11% 23% 66%	55% 17% 28%	44% 27% 29%
From an online retailer	2024	40% 20% 40%	46% 28% 26%	34% 20% 46%	39% 17% 44%	48% 23% 29%	38% 11% 51%	41% 27% 32%
From a private individual in person	2024	46% 25% 29%	51% 21% 28%	51% 21% 28%	45% 28% 27%	24% 39% 37%	49% 20% 31%	50% 25% 25%
From a flea market	2024	31% 21% 48%	26% 11% 63%	27% 22% 51%	30% 19% 51%	17% 30% 53%	45% 22% 33%	43% 26% 31%
From an online platform specialised in used goods	2024	49% 20% 31%	51% 25% 24%	54% 19% 27%	41% 22% 37%	41% 20% 39%	57% 16% 27%	53% 18% 29%

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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=475, CE n=77, Home n=100, Fashion n=134, Beauty n=45, Toys n=74, Jewellery n=45, Q101. Where and how often have you bought used goods?

Overall interest in sustainable product options

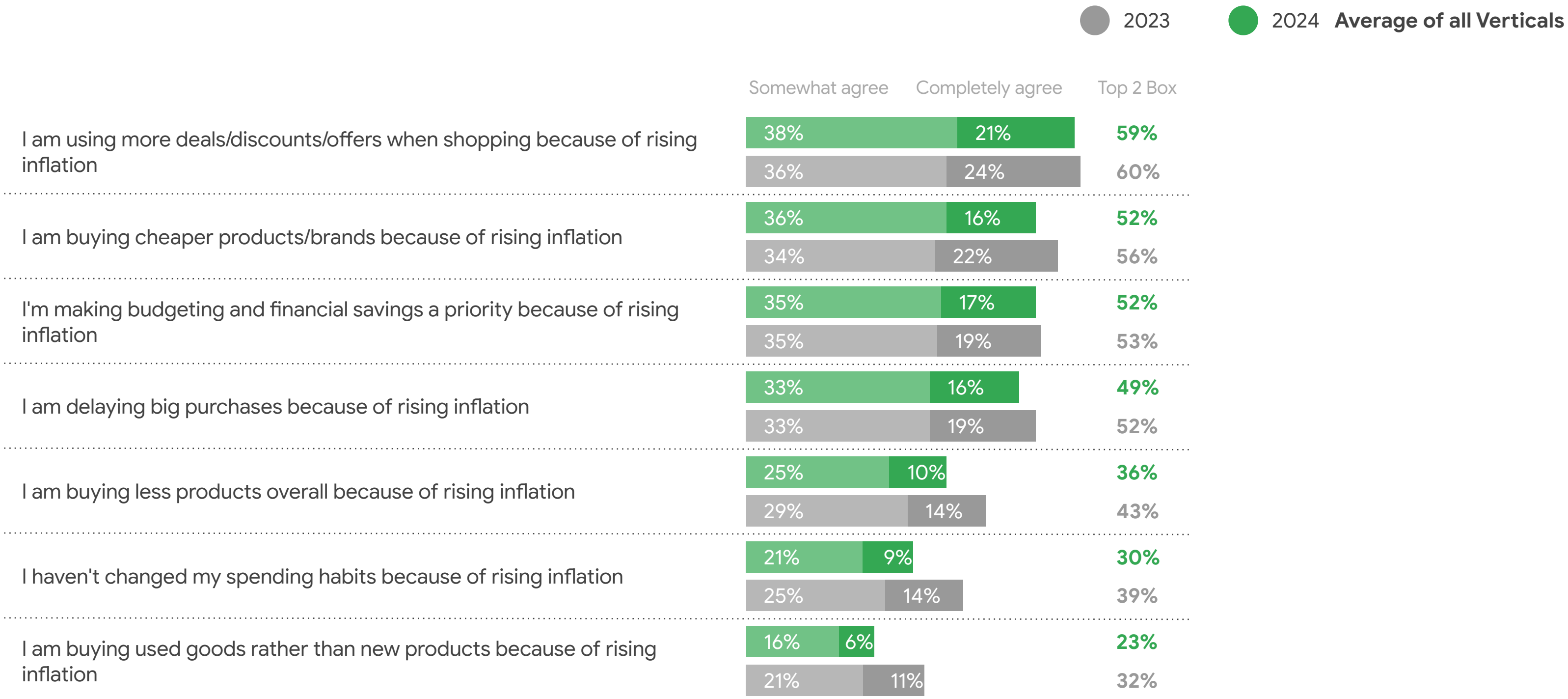




Note: Results show Average of verticals

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104, 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

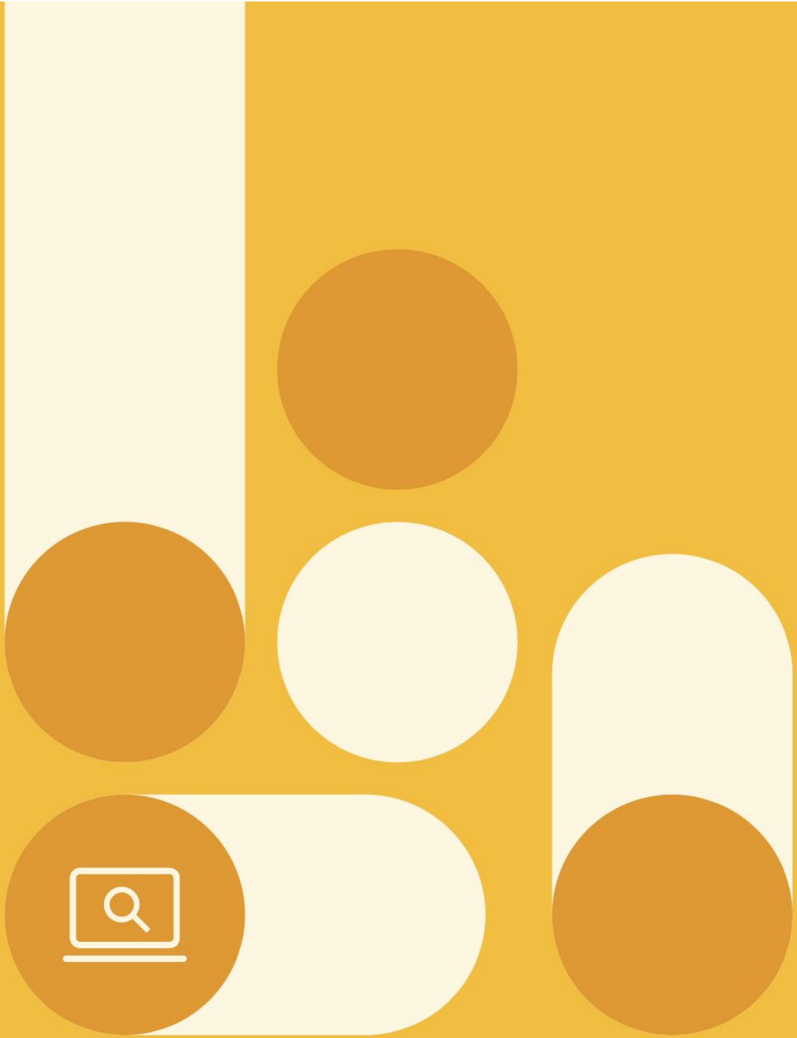


Note: Results show Top 2 boxes (somewhat agree & completely agree) ranked by average of all verticals in 2024. In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

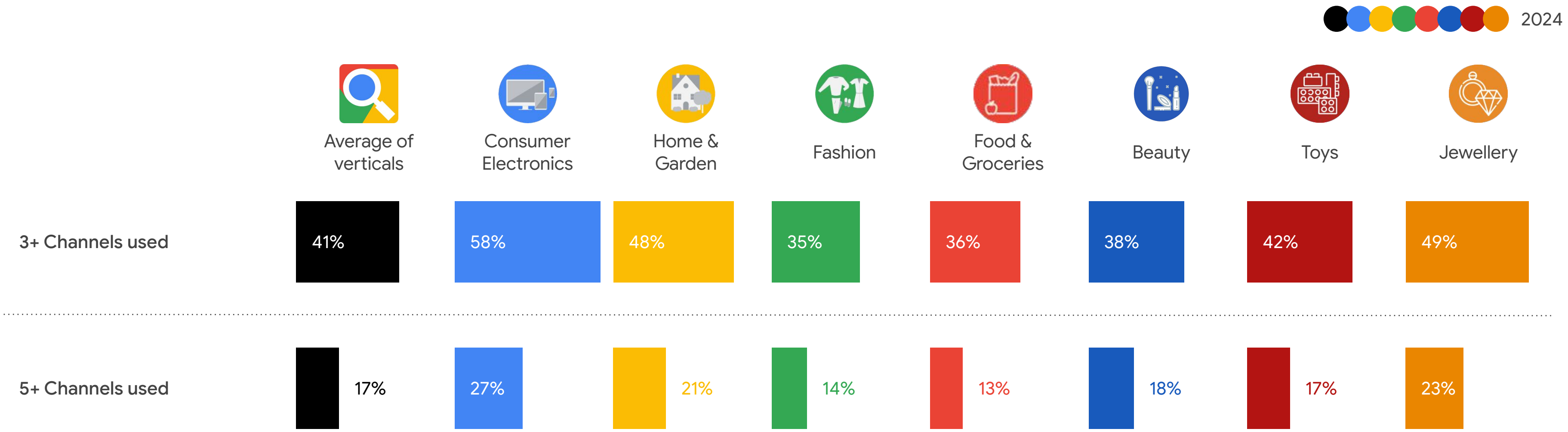
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2134, Q104. To what extent do you agree or disagree with the following statements?

Chapter 2

Product Discovery & Research



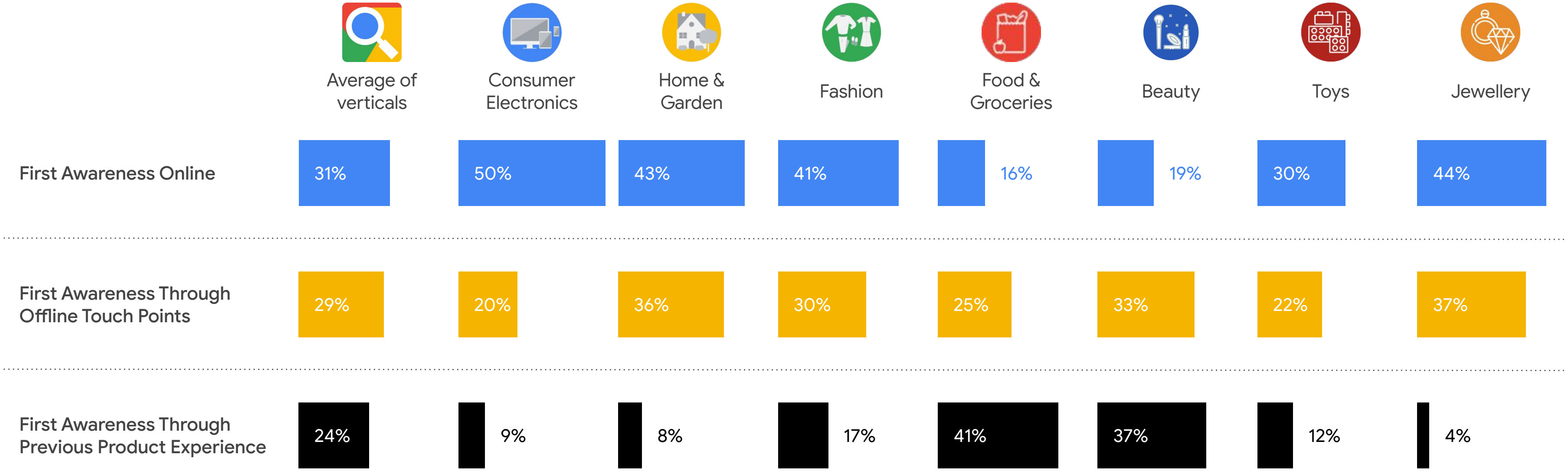
Channel usage during the shopping journey



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: Netherlands. 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=2104, CE n=184, Home n=244, Fashion n=442, Food n=564, Beauty n=401, Toys n=137, Jewellery n=133, 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	31%	50%	43%	41%	16%	19%	30%	44%
First Awareness Through Offline Touch Points	29%	20%	36%	30%	25%	33%	22%	37%
First Awareness Through Previous Product Experience	24%	9%	8%	17%	41%	37%	12%	4%

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.

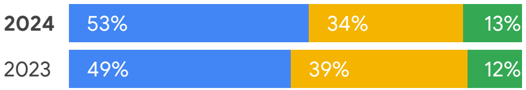
First Awareness Through Previous Experience - respondents who said that they bought the product before.

● Online ● Offline 2024

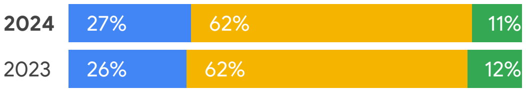
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104, CE n=184, Home n=244, Fashion n=442, Food n=564, Beauty n=401, Toys n=137, Jewellery n=133, Q7: How did you first become aware of the product you purchased?

What comes first - retailer or brand?

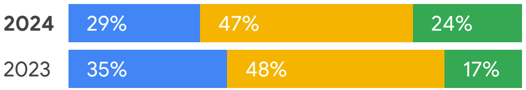
Consumer Electronics



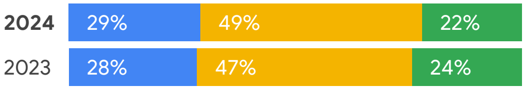
Food & Groceries



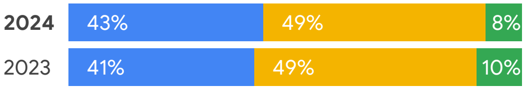
Jewellery



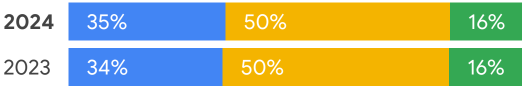
Home & Garden



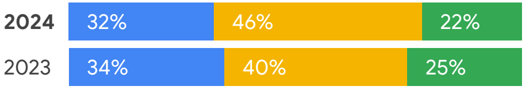
Beauty



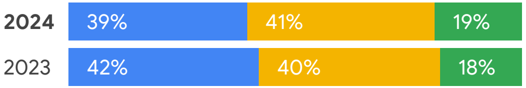
AVERAGE OF ALL VERTICALS



Fashion



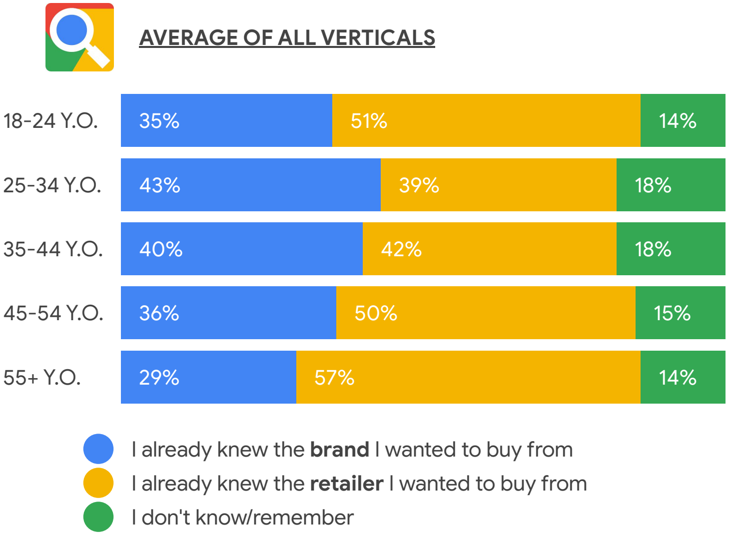
Toys



- 🟦 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: Netherlands. 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=2104/2134, CE n=184/189, Home n=244/232, Fashion n=442/442, Food n=564/613, Beauty n=401/394, Toys n=137/112, Jewellery n=133/152, 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?

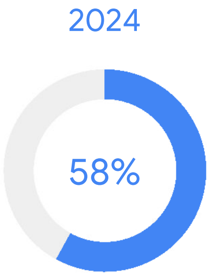


Note: 2024 results

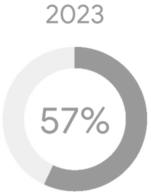
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2134, 18-24 n=250/240, 25-34 n=323/333, 35-44 n=315/322, 45-54 n=393/401, 55+ n=822/839, Q8: Which of the following statements best applies to you. When I started looking for the product I wanted to buy...

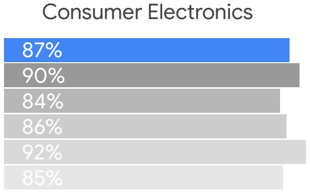
Online research prior to purchase

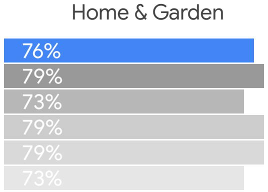
● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024

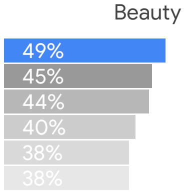


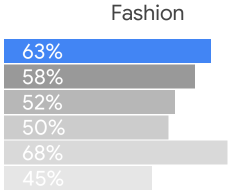
AVERAGE OF VERTIALS

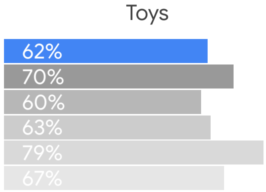










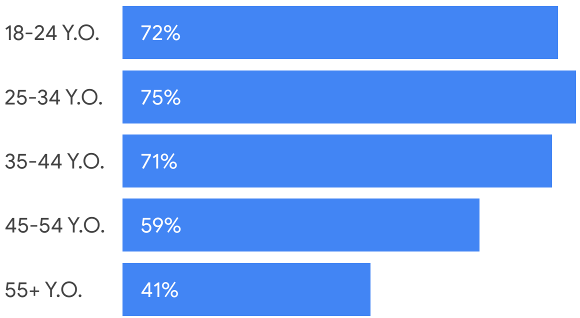


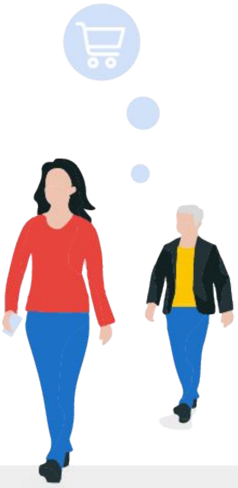
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021/2020/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104/2134/2222/1511/1576/1576, CE n=184/189/229/183/200/256, Home n=244/232/273/243/267/275, Fashion n=442/442/460/490/441/477, Food n=564/613/516/0/0/0, Beauty n=401/394/409/480/529/443, Toys n=137/112/147/114/138/125, Jewellery n=133/152/187/0/0/0, 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

● 2024

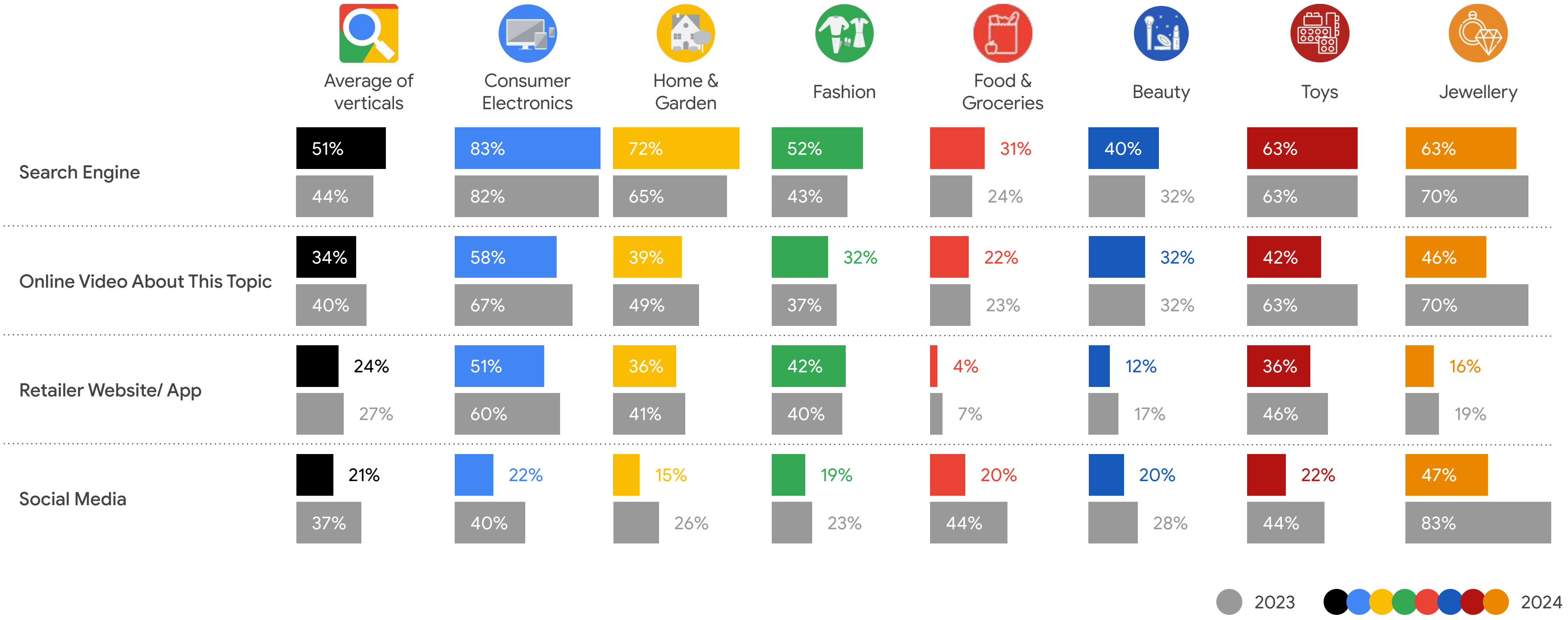
AVERAGE OF ALL VERTICALS





Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104, 18-24 n=250, 25-34 n=323, 35-44 n=315, 45-54 n=393, 55+ n=822, Q9: Where did you gather information online (on any device, via website, or app) regarding the product you bought, if at all?

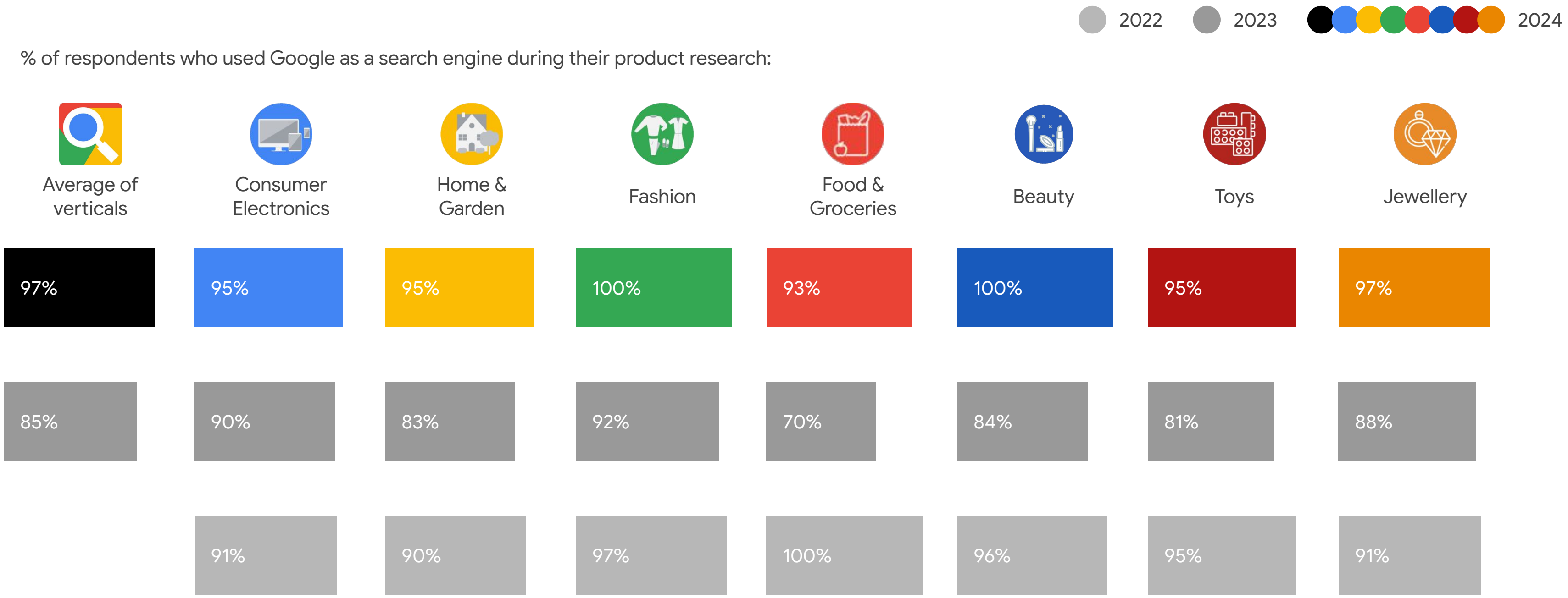
Online touchpoints during product research



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104/2134, CE n=184/189, Home n=244/232, Fashion n=442/442, Food n=564/613, Beauty n=401/394, Toys n=137/112, Jewellery n=133/152, 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

% 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: Netherlands. 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=323/298/251, CE n=64/64/52, Home n=68/57/39, Fashion n=55/54/54, Food n=31/32/18, Beauty n=48/33/39, Toys n=31/23/22, Jewellery n=27/34/28, Q9A. You mentioned you researched the product you purchased on a search engine. Which search engine(s) were you using?

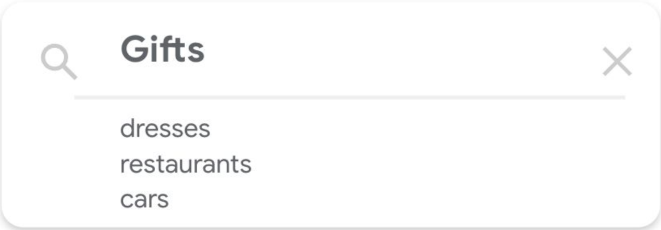
Consumers express their demands through “modifiers”

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:



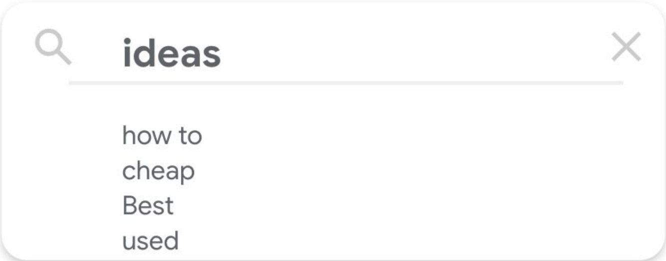
Gifts

dresses
restaurants
cars

Modifiers

What users want to know about a topic

Examples:

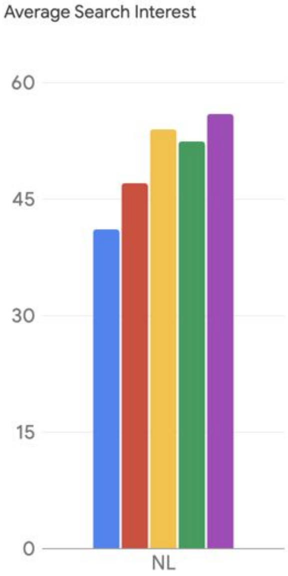


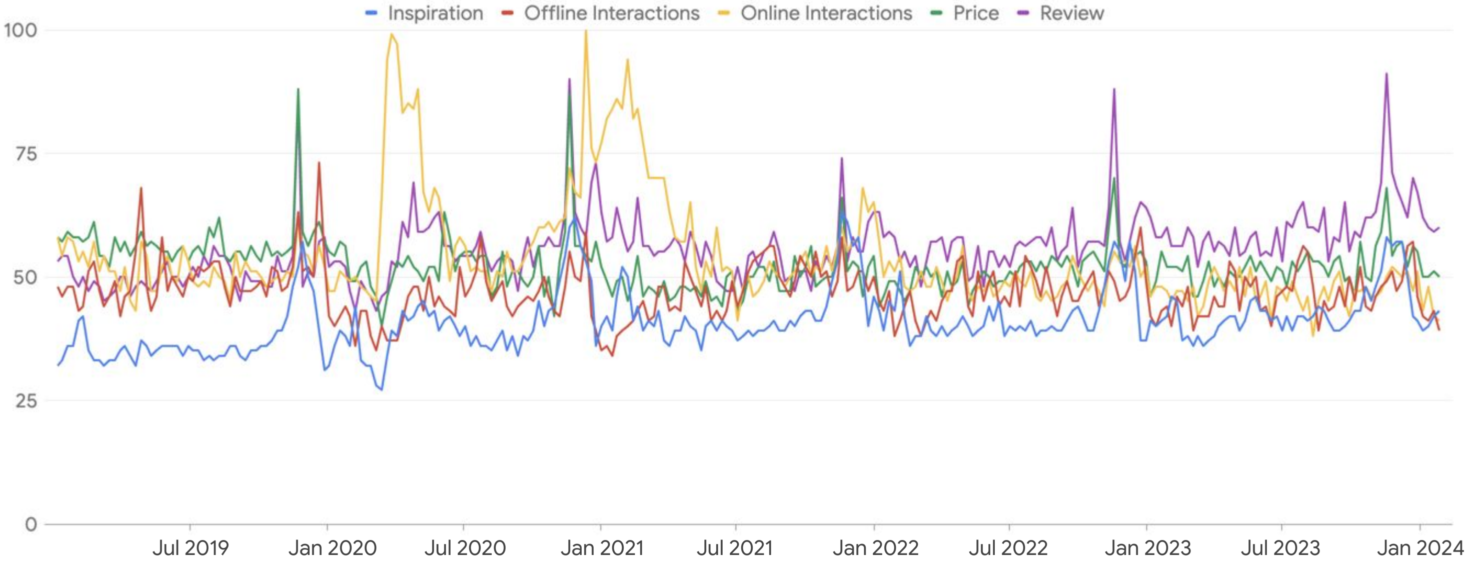
ideas

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

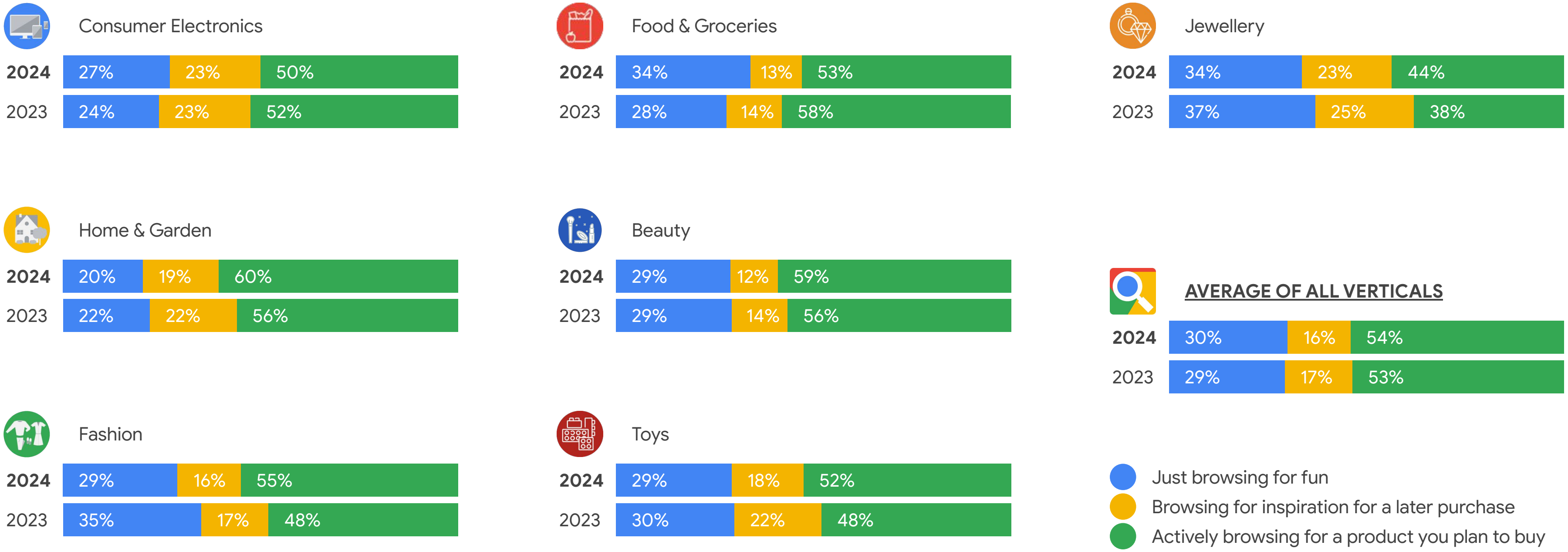
Search interest of popular modifiers in the shopping category





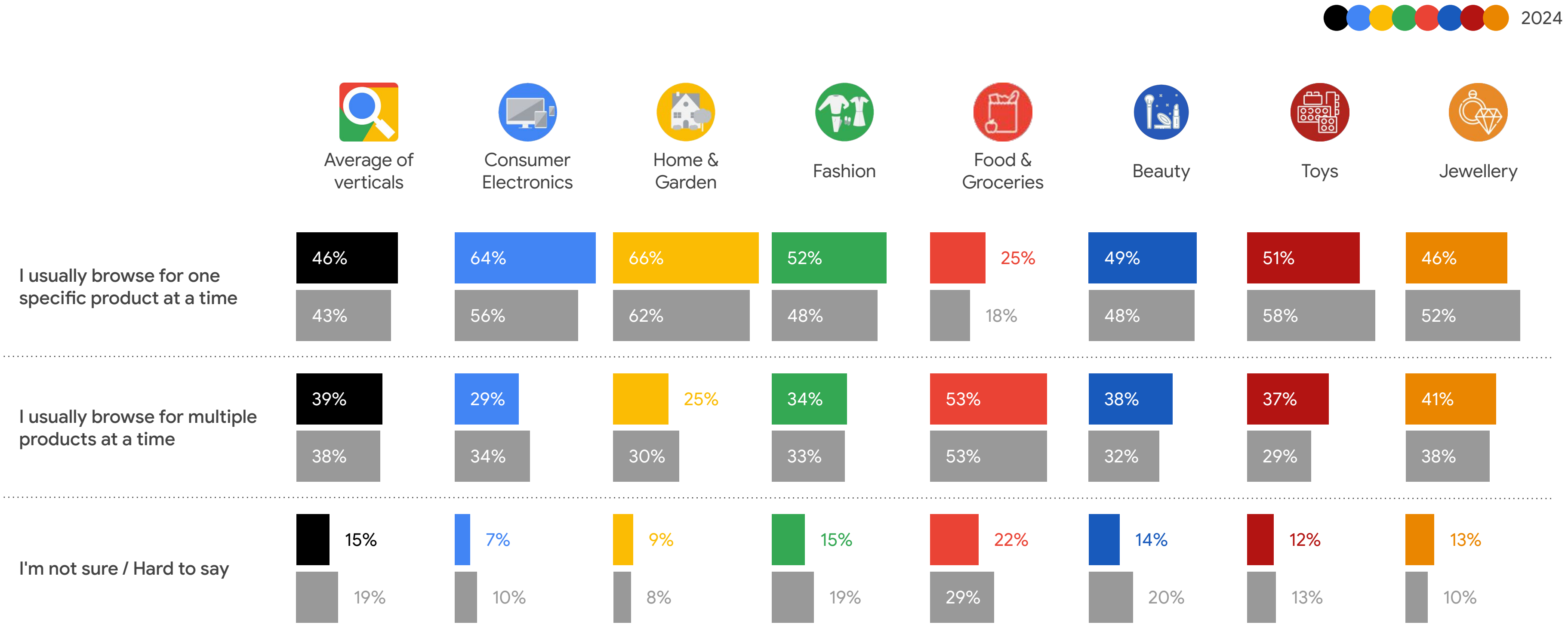
[Source: Google Trends (Jan 2019 - Jan 2024)]() - translated modifiers (into local languages) have been used for each market. Shown in English here for simplicity reasons:

Retailtainment



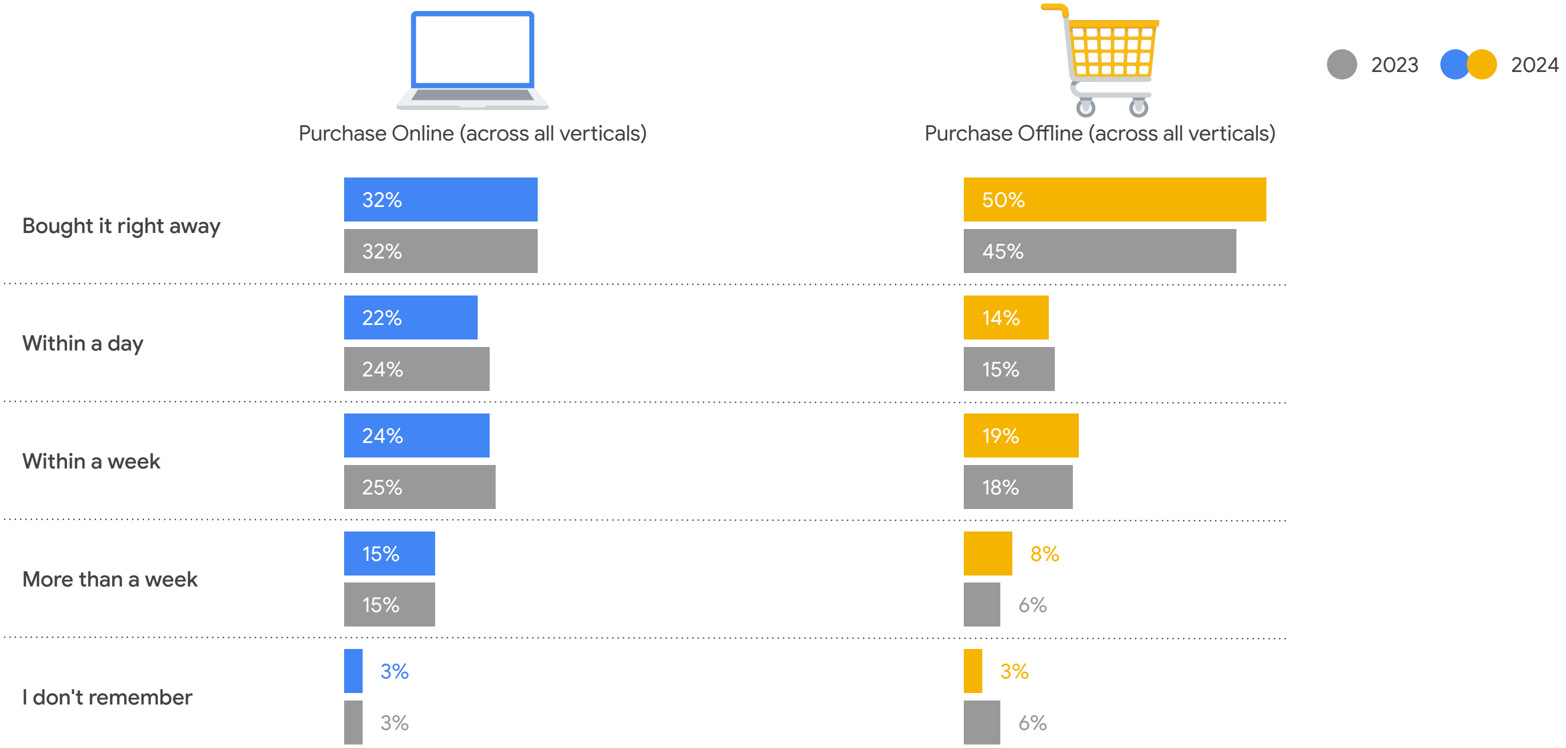
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2134, CE n=184/189, Home n=244/232, Fashion n=442/442, Food n=564/613, Beauty n=401/394, Toys n=137/112, Jewellery n=133/152, 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



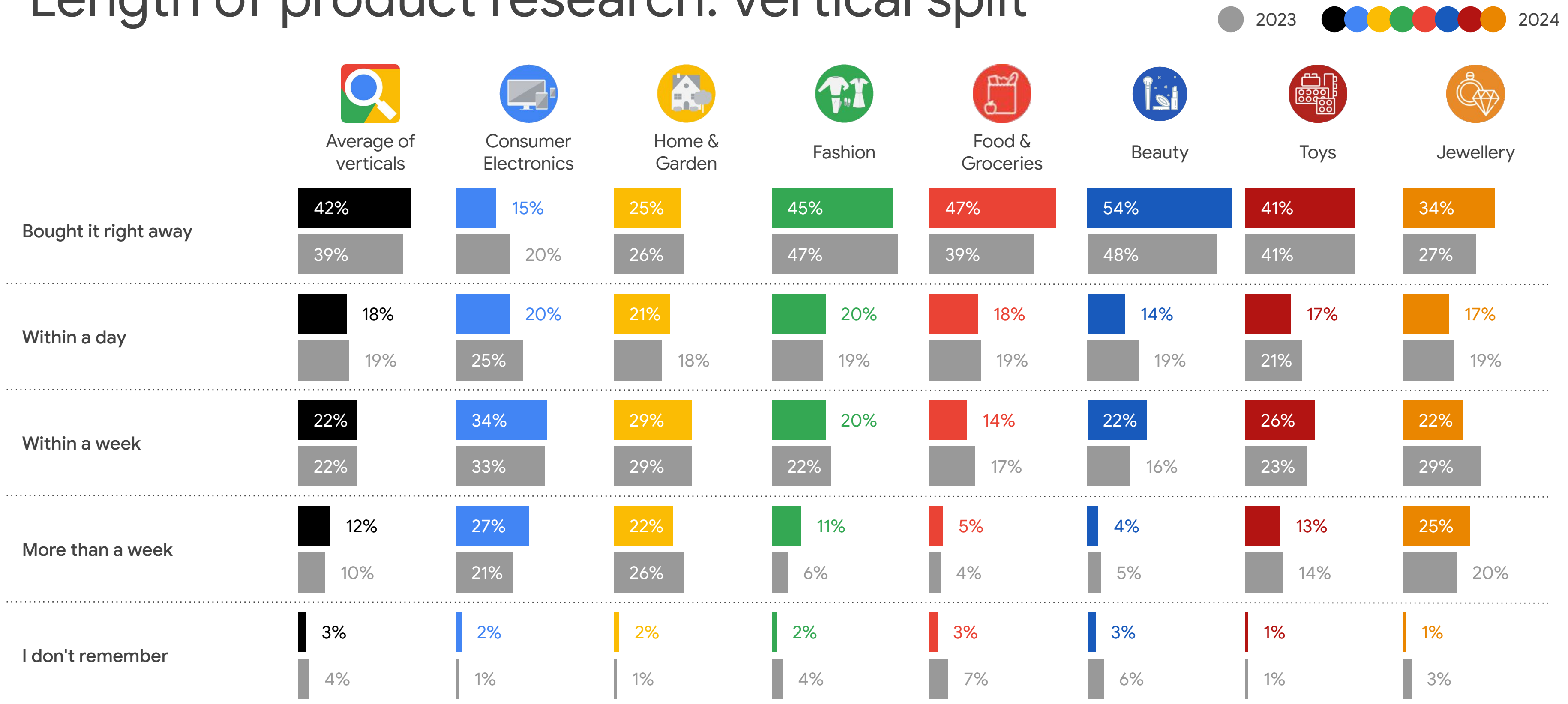
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2134, CE n=184/189, Home n=244/232, Fashion n=442/442, Food n=564/613, Beauty n=401/394, Toys n=137/112, Jewellery n=133/152, 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: Netherlands. 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=2104/2134, 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?

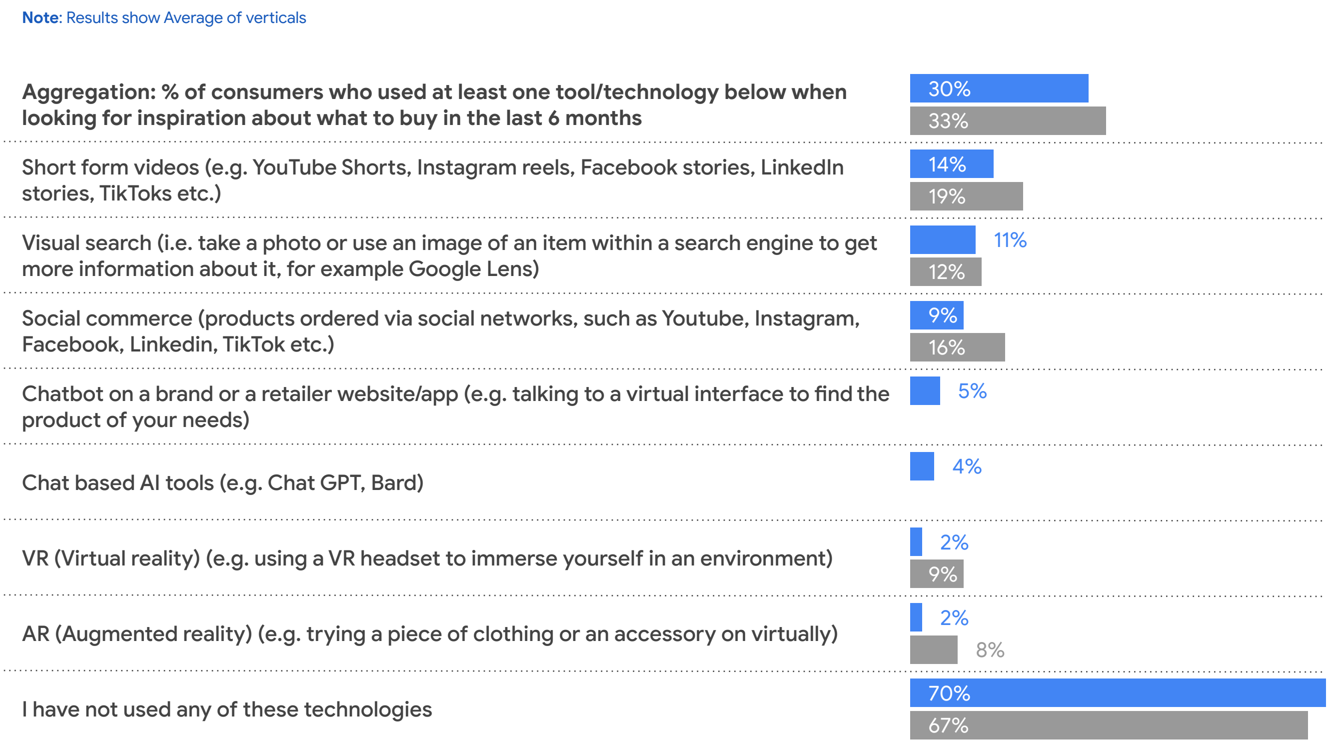
Length of product research: vertical split



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=2104/2134, CE n=184/189, Home n=244/232, Fashion n=442/442, Food n=564/613, Beauty n=401/394, Toys n=137/112, Jewellery n=133/152, 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: Netherlands. 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=2104/2134, 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

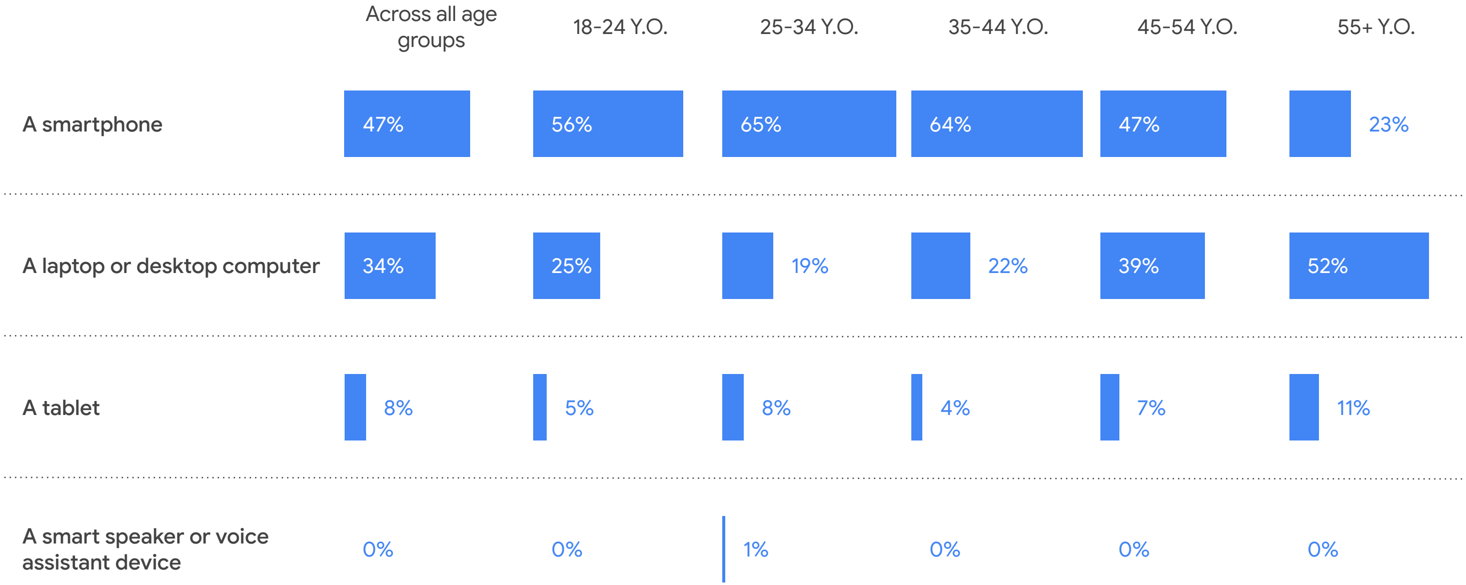
Mobile shopping

- 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

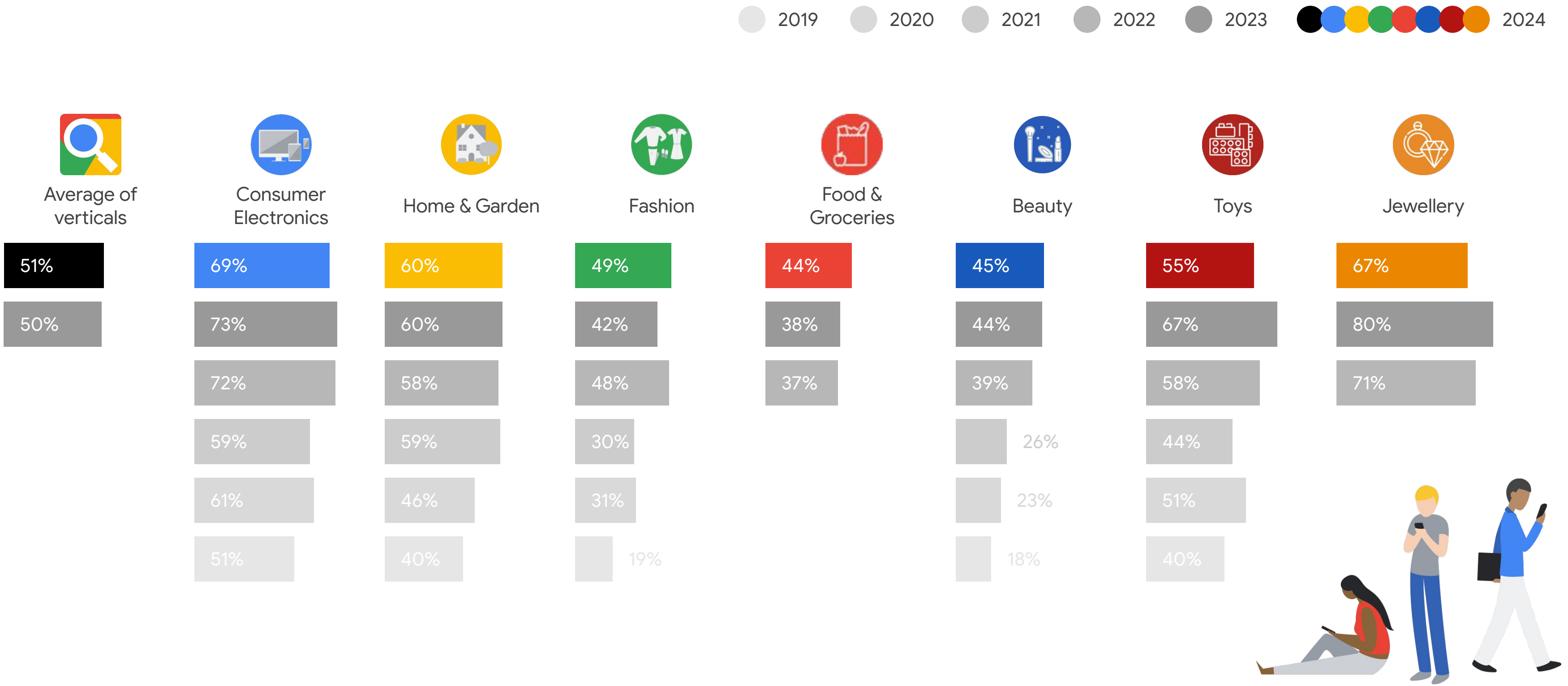
● 2024



	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	47%	56%	65%	64%	47%	23%
A laptop or desktop computer	34%	25%	19%	22%	39%	52%
A tablet	8%	5%	8%	4%	7%	11%
A smart speaker or voice assistant device	0%	0%	1%	0%	0%	0%

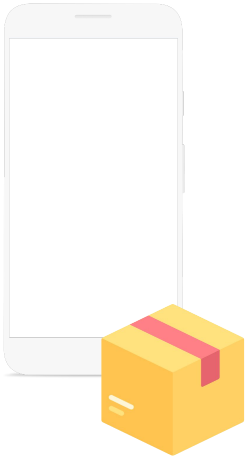
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1050, 18-24 n=144, 25-34 n=202, 35-44 n=188, 45-54 n=194, 55+ n=323, 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: Netherlands. 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 2024/2023/2022/2021/2020/2019: Respondents using smartphone for their product research, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1939/1867/1923/1271/1408/1395, CE n=179/175/199/149/179/235, Home n=227/207/249/207/240/253, Fashion n=406/390/387/393/397/417, Food n=499/506/440/0/0/0, Beauty n=382/355/364/424/465/377, Toys n=127/102/133/98/128/114, Jewellery n=119/132/150/0/0/0, Q12: When you were looking for information, did you at any point use your smartphone to get hold of the information you needed?

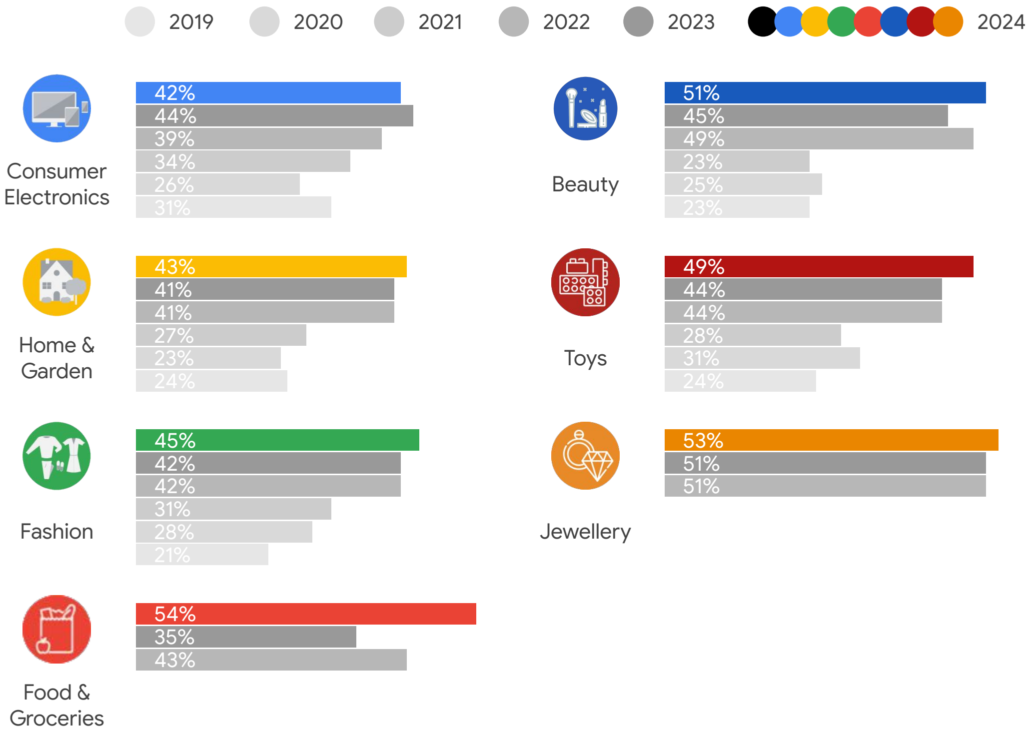
Smartphone usage during online shopping



Average of verticals

47%

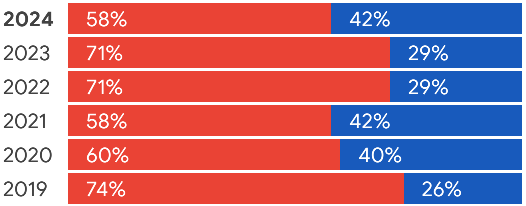
use their smartphone when making an online purchase across all verticals



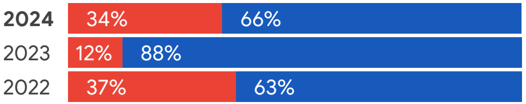
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021/2020/2019: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1050/1052/983/617/730/574, CE n=138/144/155/109/124/145, Home n=146/149/148/102/138/118, Fashion n=291/276/251/232/295/173, Food n=152/153/102/0/0/0, Beauty n=154/150/139/124/94/83, Toys n=80/71/73/50/77/54, Jewellery n=89/109/114/0/0/0, Q3: Which device did use you for your online purchase?

Purchases via smartphones: websites vs. apps

Consumer Electronics

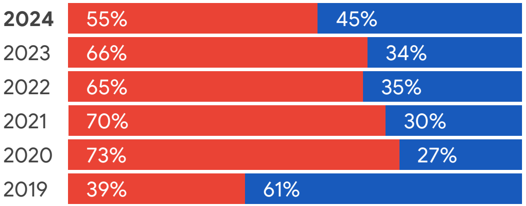


Food & Groceries

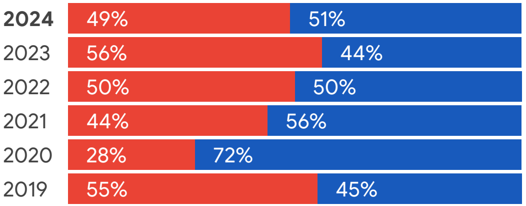


Jewellery

Home & Garden



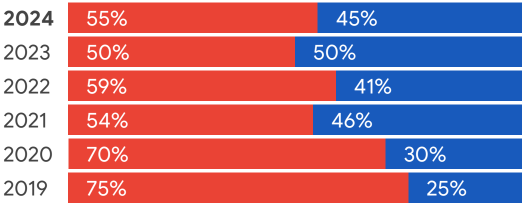
Beauty



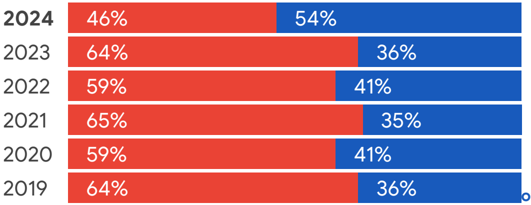
AVERAGE OF ALL VERTICALS

● Website ● App

Fashion



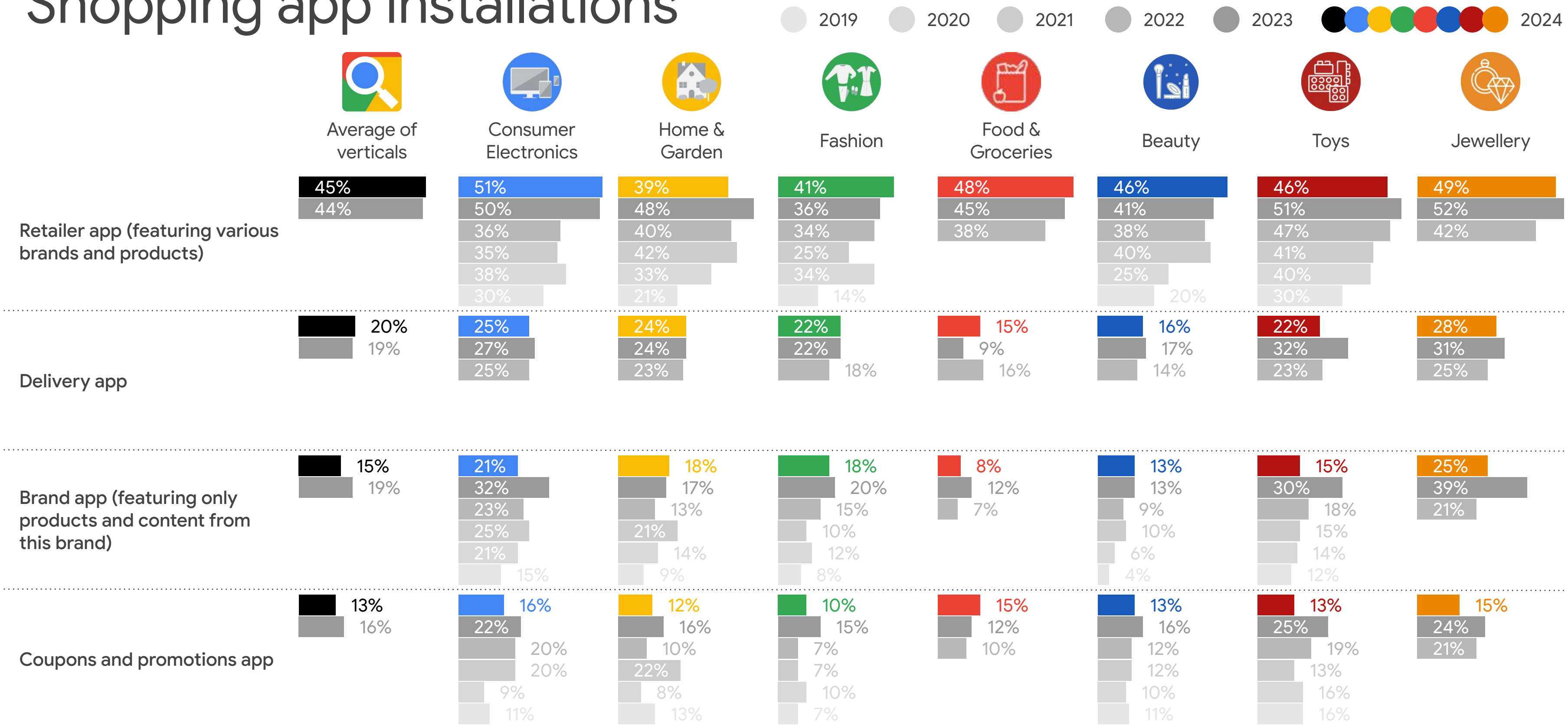
Toys



ote: 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: Netherlands. 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 2024/2023/2022/2021/2020/2019: Online buyers purchasing via smartphone, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=486/434/412/177/189/137, CE n=57/63/59/36/32/43, Home n=62/61/59/27/31/28, Fashion n=127/110/99/71/81/36, Food n=80/50/41/0/0/0, Beauty n=75/66/67/28/22/17, Toys n=39/31/31/14/24/13, Jewellery n=47/54/56/0/0/0, Q3_B: And how did you buy via your smartphone?

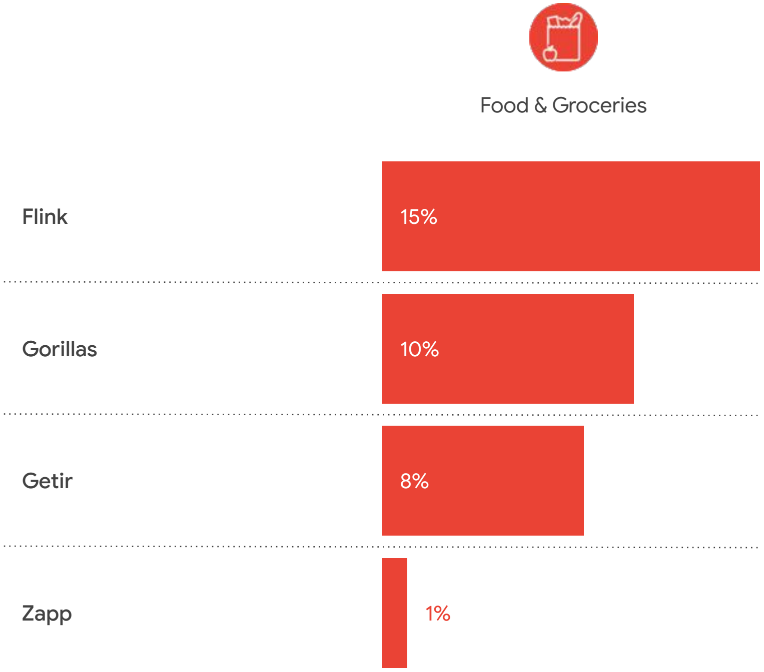
Shopping app installations

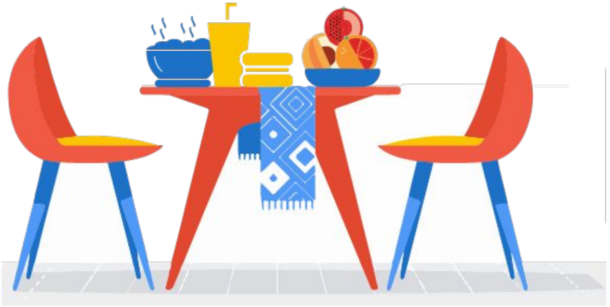


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
Base 2024/2023/2022/2021/2020/2019: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104/2134/2222/1271/1408/1395, CE n=184/189/229/149/179/235, Home n=244/232/273/207/240/253, Fashion n=442/442/460/393/397/417, Food n=564/613/516/0/0/0, Beauty n=401/394/409/424/465/377, Toys n=137/112/147/98/128/114, Jewellery n=133/152/187/0/0/0, Q20: Which of these shopping apps have you installed on your smartphone, if any?

Food & Groceries: delivery apps usage

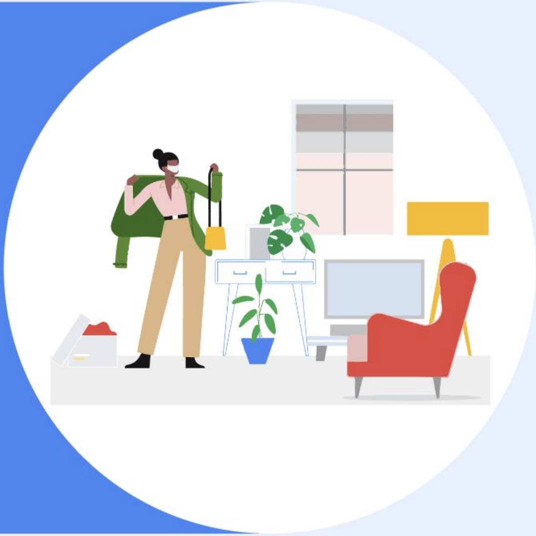
● 2024





Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Netherlands. 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=85, Food n=85, Q20_B: Did you use any of the following delivery apps?

Google Market Insights



Smart Shopper 2024