

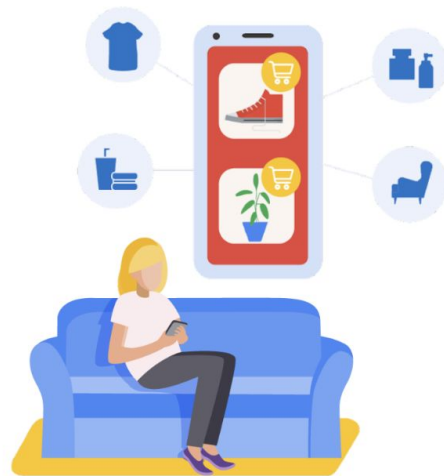
Smart Shopper 2024



Belgium country report

March 2024

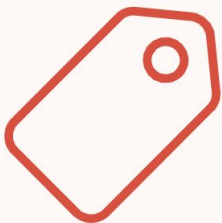
POC: @raphaelarekab, @jarzabek, @jkasprzak



Shape of Shopping
Smart Shopper



by EMEA Market Insights



Introduction

- Study Background & Methodology [[link](#)]
- Category description [[link](#)]
- Content overview [[link](#)]
- 2024 Key stats for Belgium across all verticals [[link](#)]

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
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

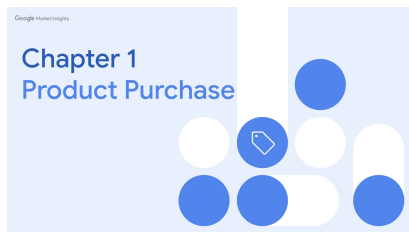
EEM: Saudi Arabia, South Africa, Turkey

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: Belgium, 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.

Chapter 1: Product Purchase

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- ROPO matrix: 2023 & 2024 [\[link\]](#)
- Purchase channel preferences & omni-channel importance [\[link\]](#)
- Change of buying behaviour since 2020 covid pandemic [\[link\]](#)
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- Location and frequency of purchasing used goods [\[link\]](#)
- Overall interest in sustainable product options [\[link\]](#)
- Impact of cost of living [\[link\]](#)

Chapter 2: Product Discovery & Research

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

Chapter 3: Mobile Shopping

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- Smartphone usage during product research [\[link\]](#)
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- Purchases via smartphones: websites vs. apps [\[link\]](#)
- Shopping app installations [\[link\]](#)
- Food & Groceries: delivery apps usage [\[link\]](#)

2024 Key stats for Belgium across all verticals



48% vs. 52%

Online vs. offline purchase split



65%

Do online research



61%

Channel agnostic buyers who are not fully set on one channel



58%

Used a search engine prior to their last purchase



32%

Research online and purchase offline



96%

Used Google as a search engine for product research



56%

Experienced online pain points during their shopping journey



40%

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



41% vs. 40%

(not adding up to 100%)

Retailer vs. brand - what comes first?



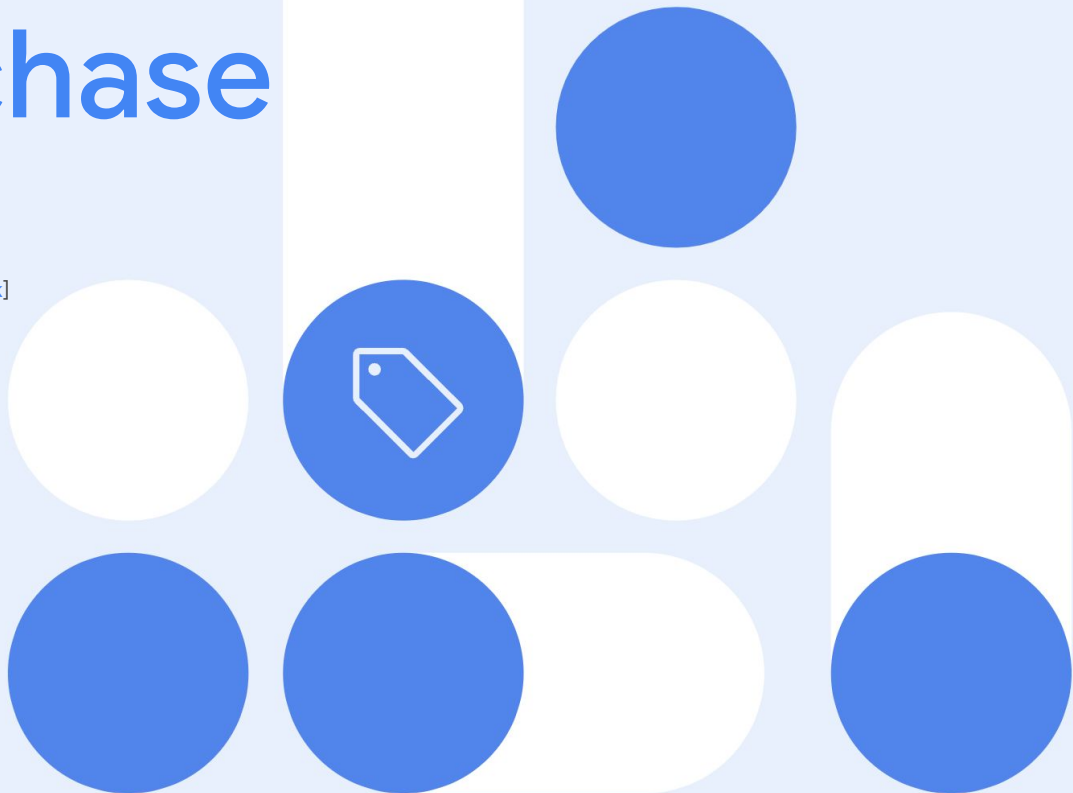
29%

Used five or more channels to shop

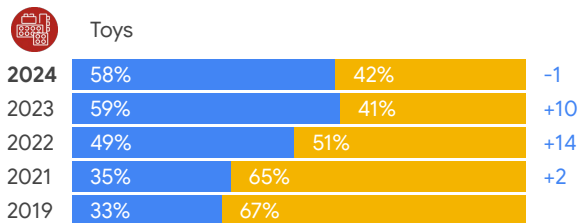
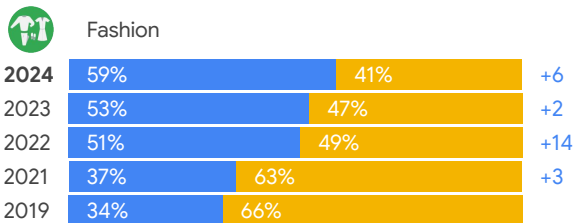
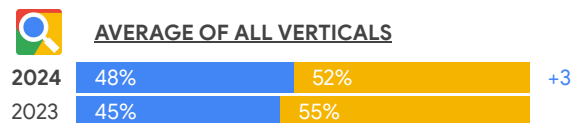
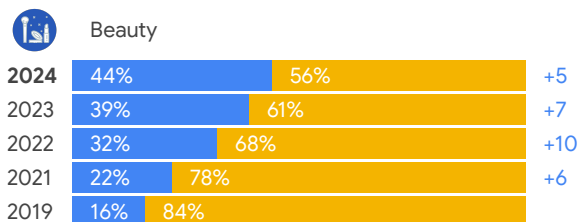
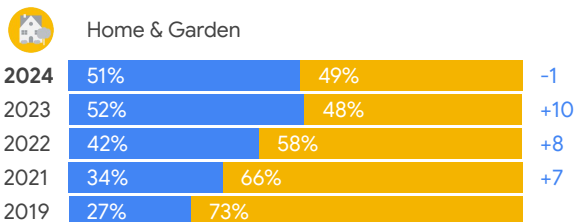
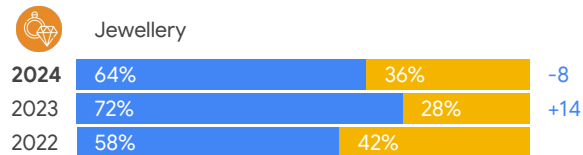
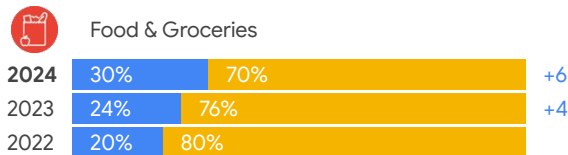
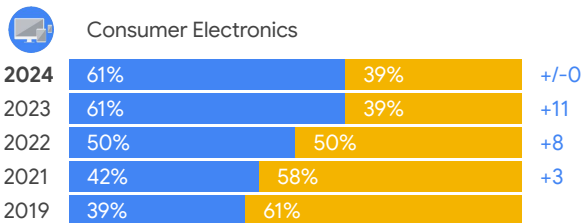
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Last purchase: online vs. offline

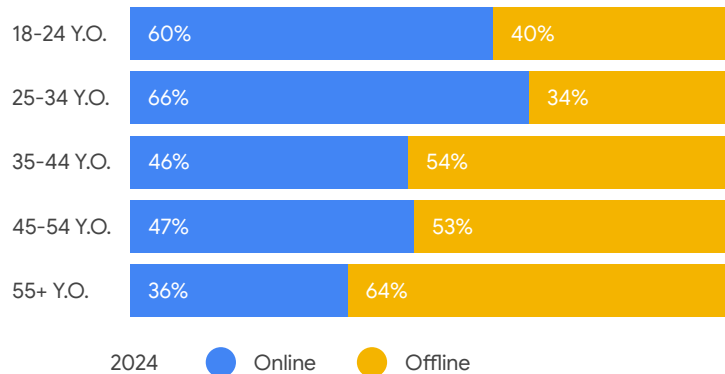


 Online  Offline

Last purchase: online vs. offline

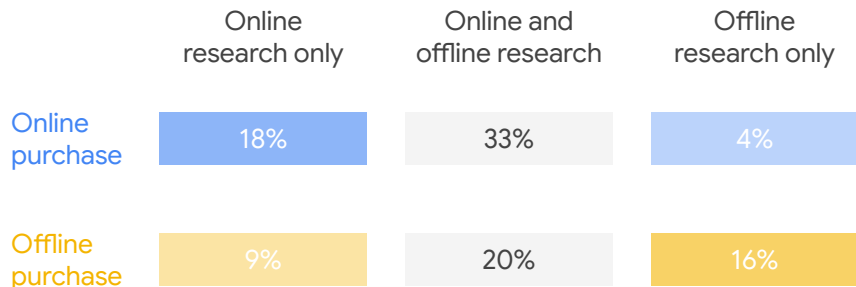


AVERAGE OF ALL VERTICALS

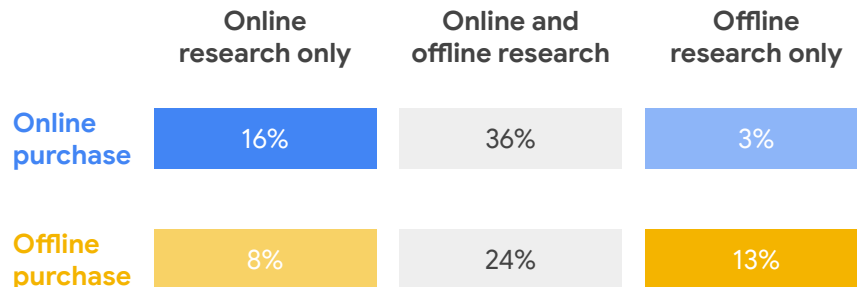


ROPO matrix: 2023 & 2024

2023, Average across all verticals



2024, Average across all verticals

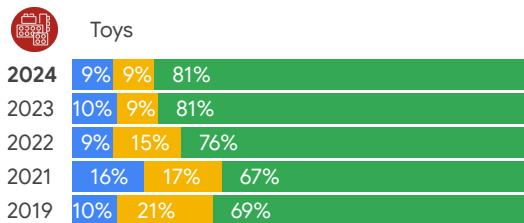
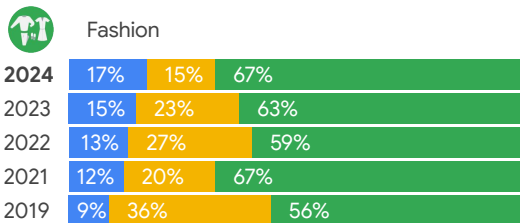
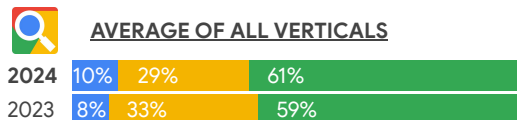
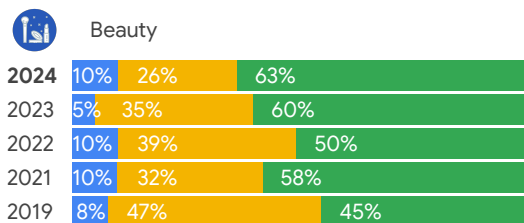
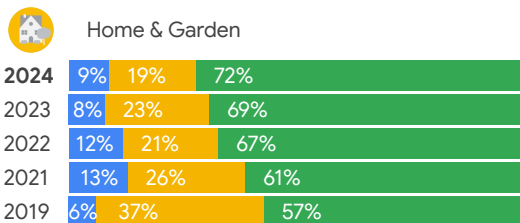
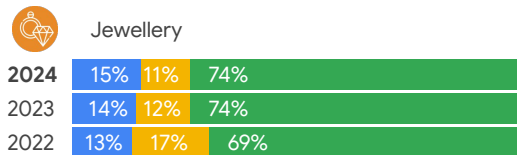
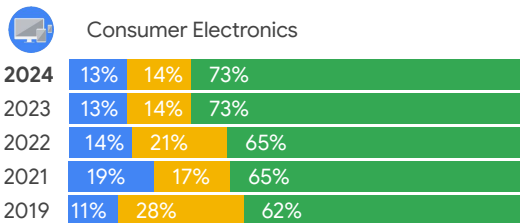


● Online ● Offline

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



Purchase channel preferences & omni-channel importance



● Online ● Offline ● Agnostic

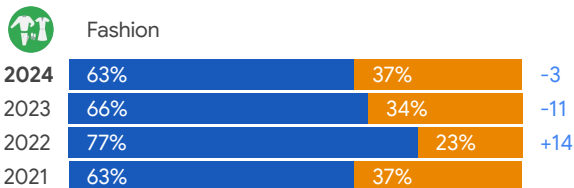
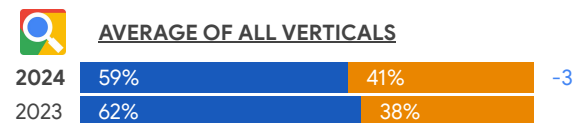
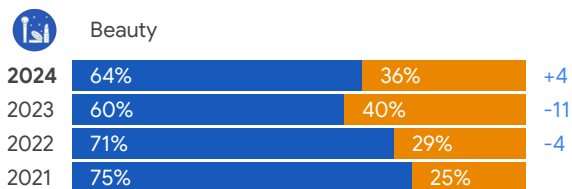
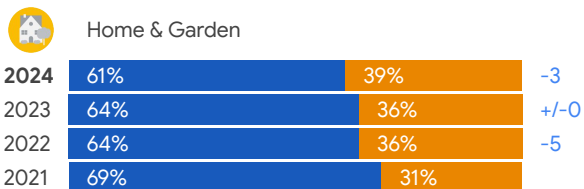
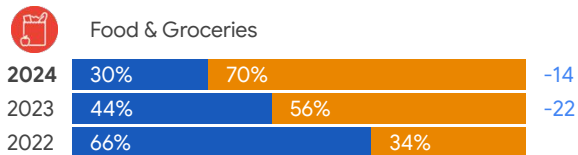
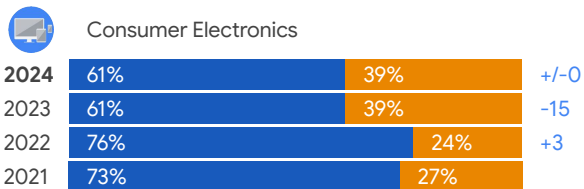
Note: showing aggregated results



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

Change of buying behaviour since 2020 covid pandemic



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

Note: Results exclude respondents whose behaviour remained the same.

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



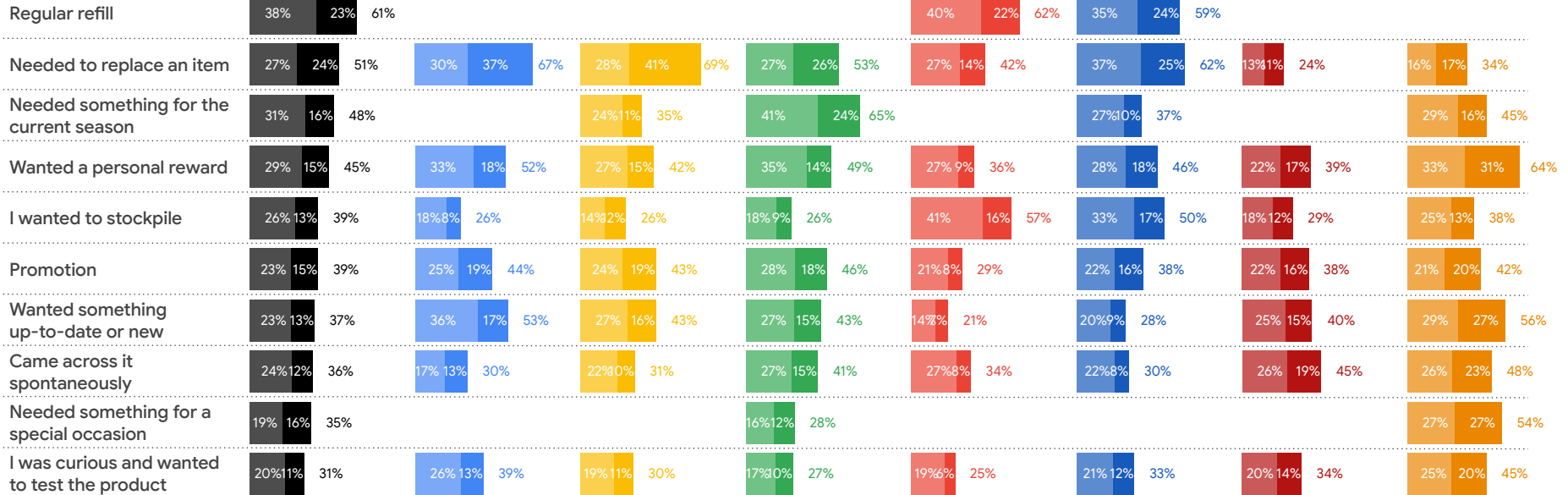
Beauty



Toys



Jewellery



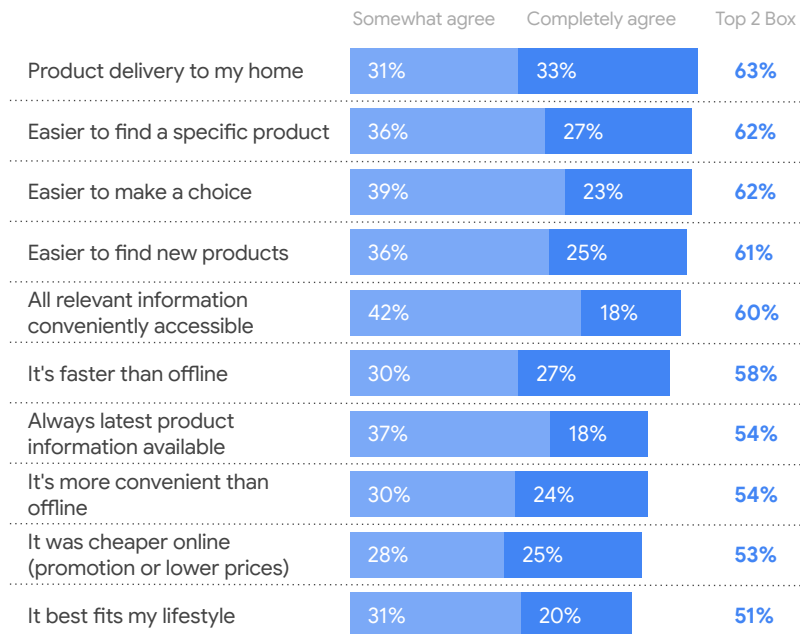
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 Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104, CE n=204, Home n=258, Fashion n=435, Food n=547, Beauty n=353, Toys n=146, Jewellery n=162, Q6: Why did you start looking for the product you bought? To what extent do you agree or disagree with the following statements?

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

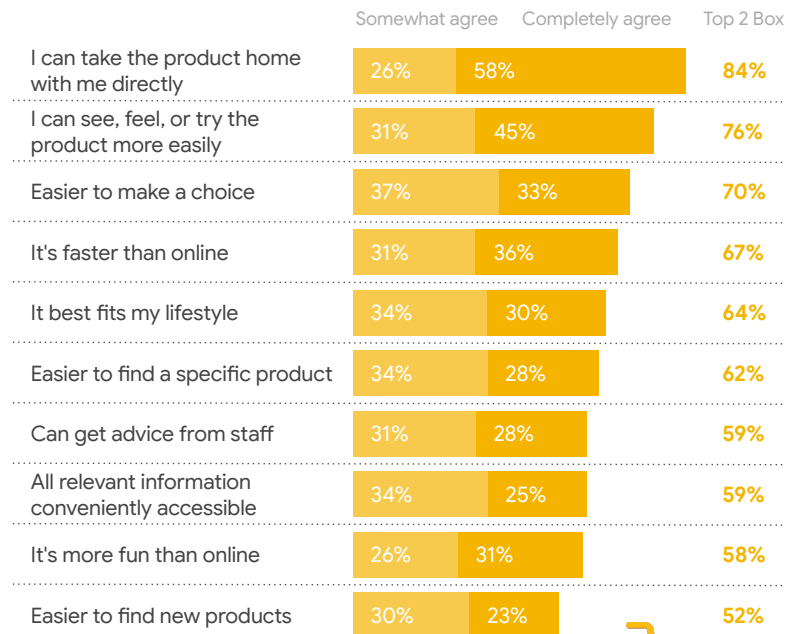
Note: Results show Top 2 boxes (somewhat agree & completely agree) across verticals, Top 10 drivers

2024

Top 10 online purchase drivers



Top 10 offline purchase drivers



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

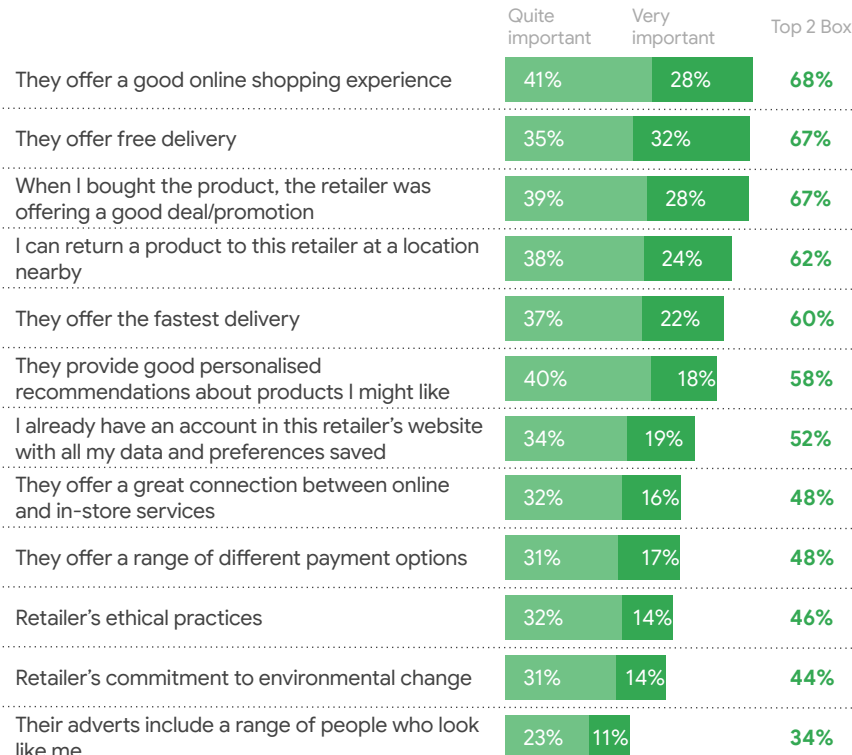
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 Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2103, Online n=1017, Offline n=1086, Q17_A, Q17_B: Why did you buy online / offline? How much do you agree or disagree with the following statements?

Reasons for retailer selection: avg. across verticals

Note: Results show Top 2 boxes (quite important & very important) ranked by average of all verticals in 2024

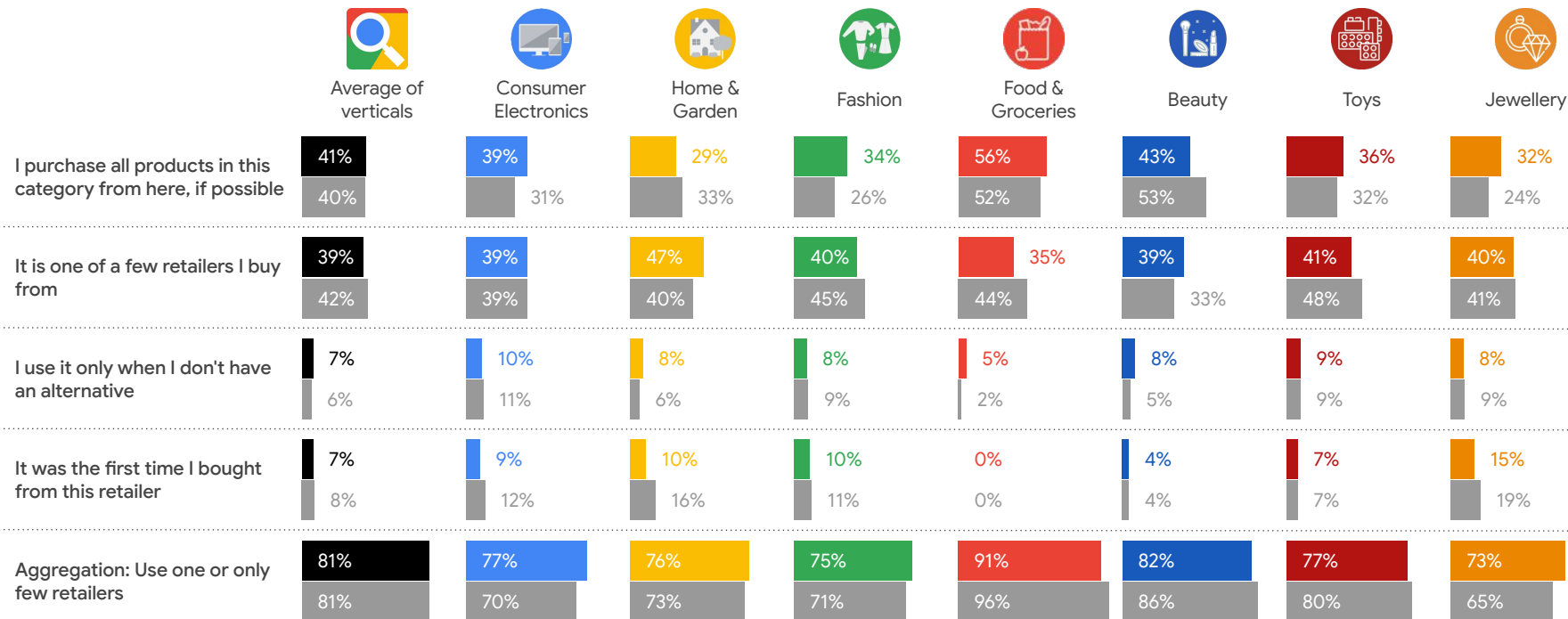


2024 Average of all Verticals



Note: In some cases, the percentages of quite important & very important might not match the Top 2 Box score because of rounding up numbers.

Relationship with the retailer for the last purchase

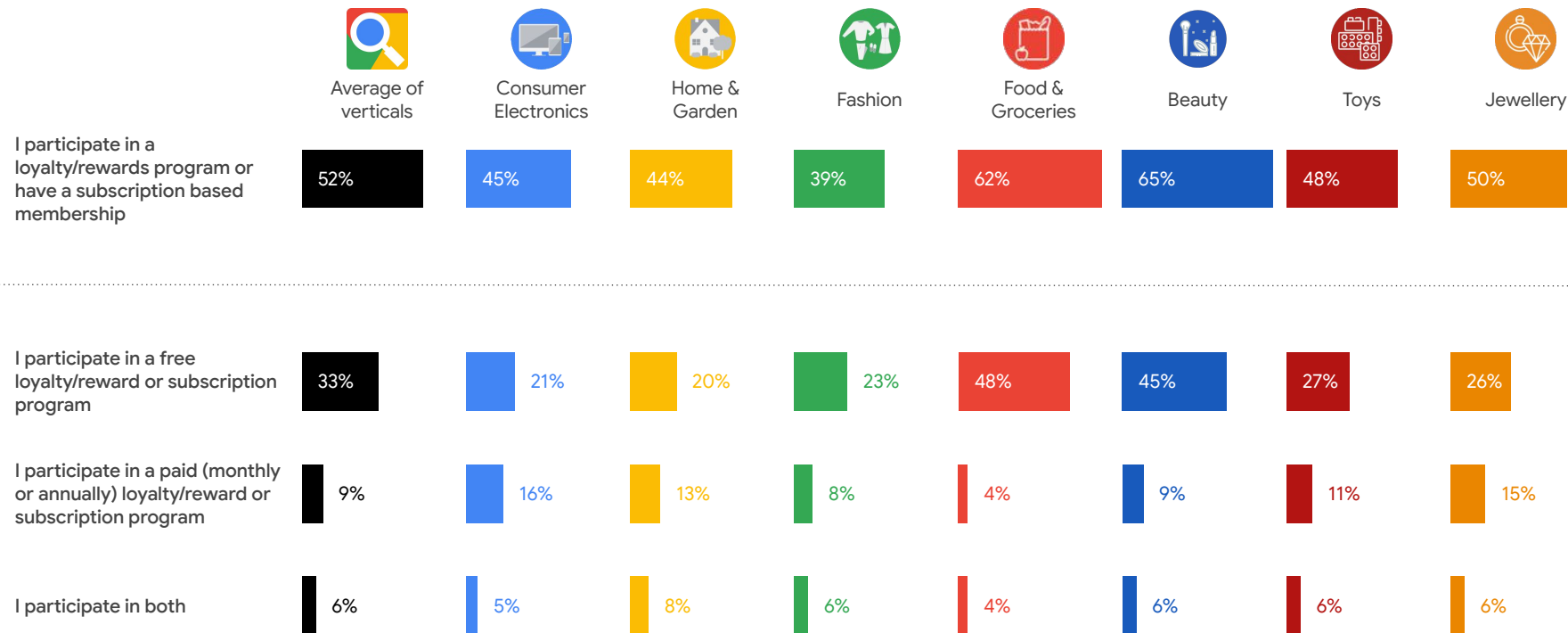


● 2023 ●●●●●●● 2024

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=2104/2108, CE n=203/183, Home n=258/232, Fashion n=435/432, Food n=547/611, Beauty n=353/377, Toys n=146/128, Jewellery n=162/145, Q1_C: Which of the following statements best describes your relationship with the retailer where you bought?

Participation in loyalty & subscription programs

2024



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

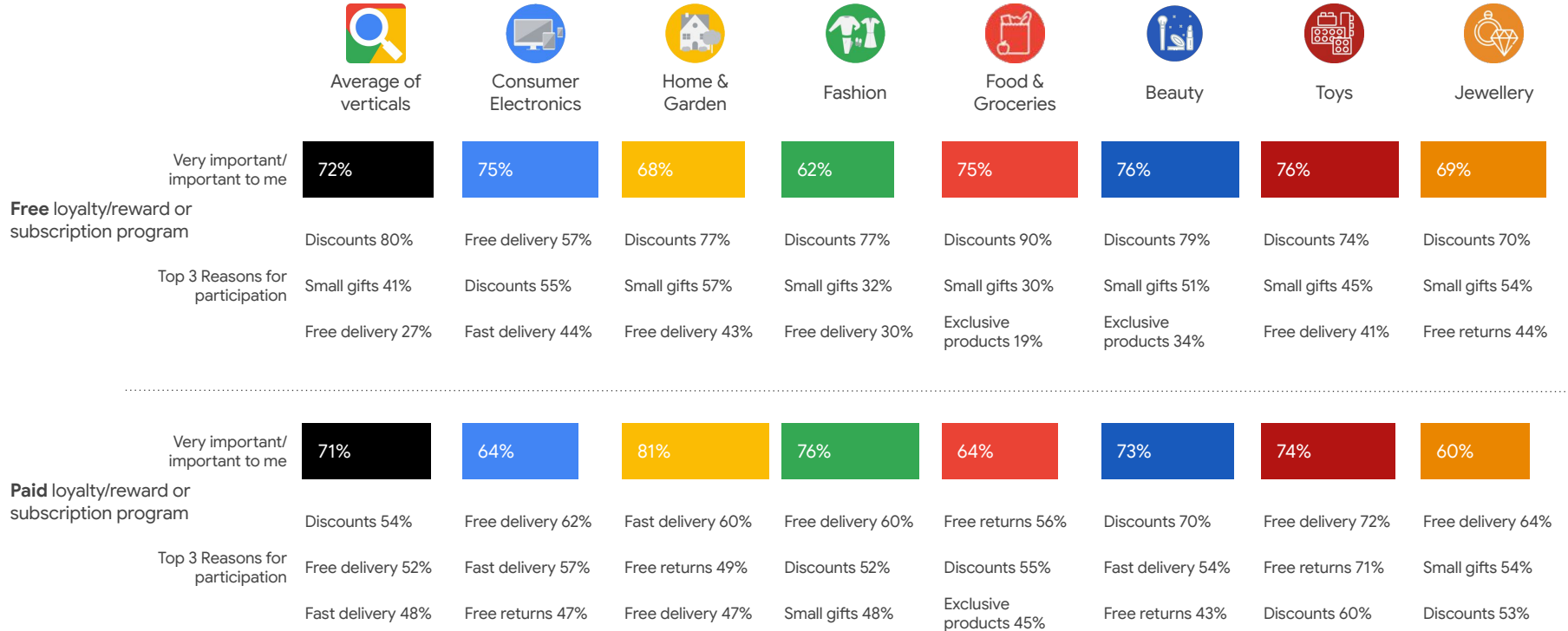
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104, CE n=203, Home n=258, Fashion n=435, Food n=547, Beauty n=353, Toys n=146, Jewellery n=162.

(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



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

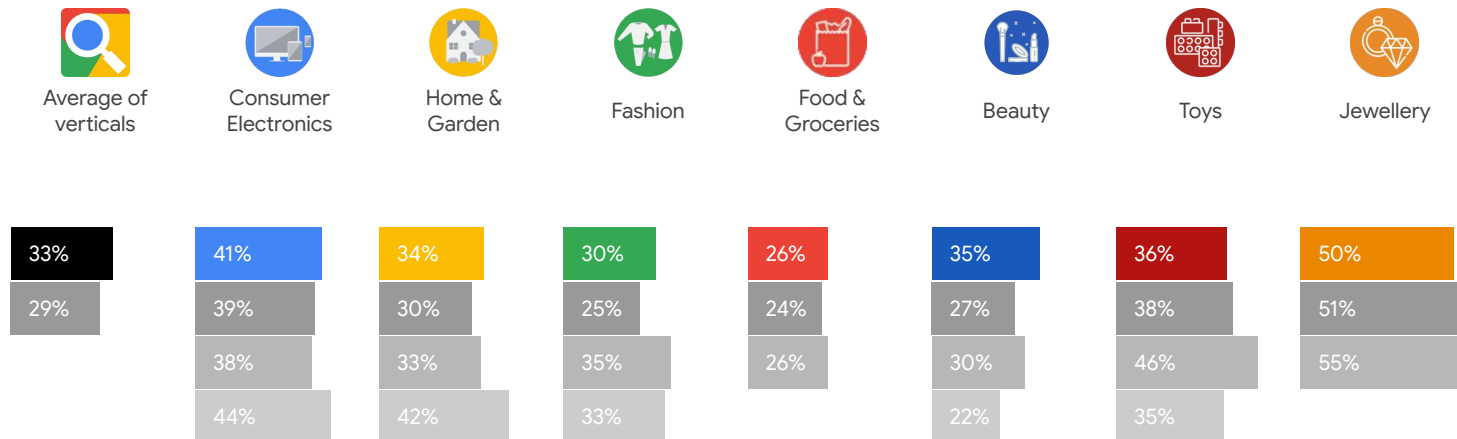
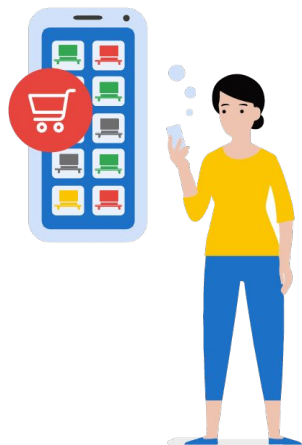
Base 2024: Subscribers of Free & Paid Loyalty/ Reward Program, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1012, CE n=86, Home n=105, Fashion n=160, Food n=307, Beauty n=212, Toys n=65, Jewellery n=77.

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

● 2021 ● 2022 ● 2023 ● 2024



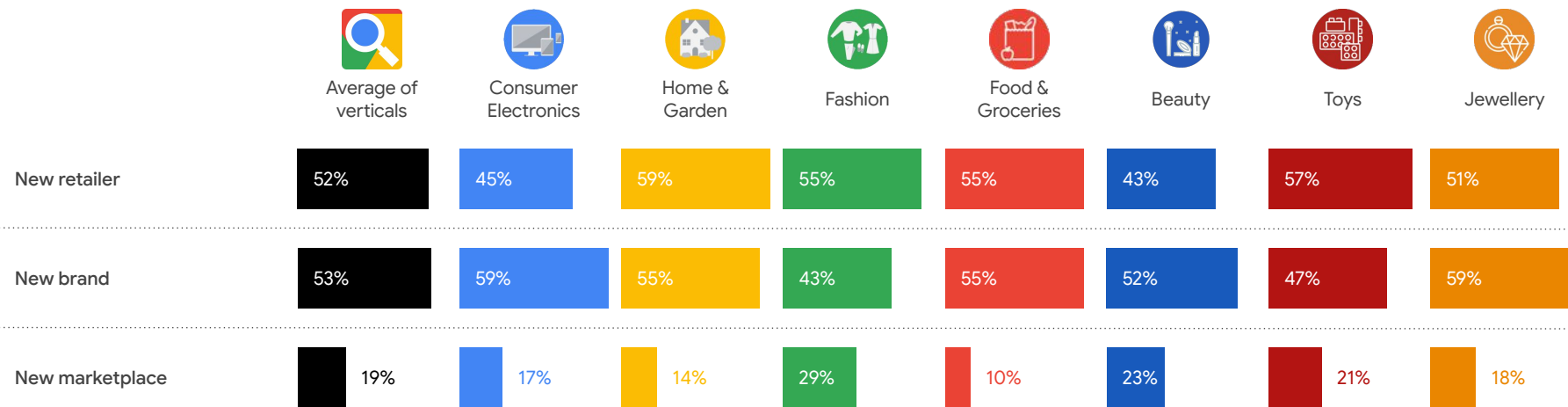
Note: Purchases made in the last 4 weeks from a retailer, a platform or brand never shopped with before

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=2104/2108/2207/1439, CE n=203/183/226/188, Home n=258/232/292/263, Fashion n=435/432/460/447, Food n=547/611/514/0, Beauty n=353/377/392/398, Toys n=146/128/136/143, Jewellery n=162/145/187/0, 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

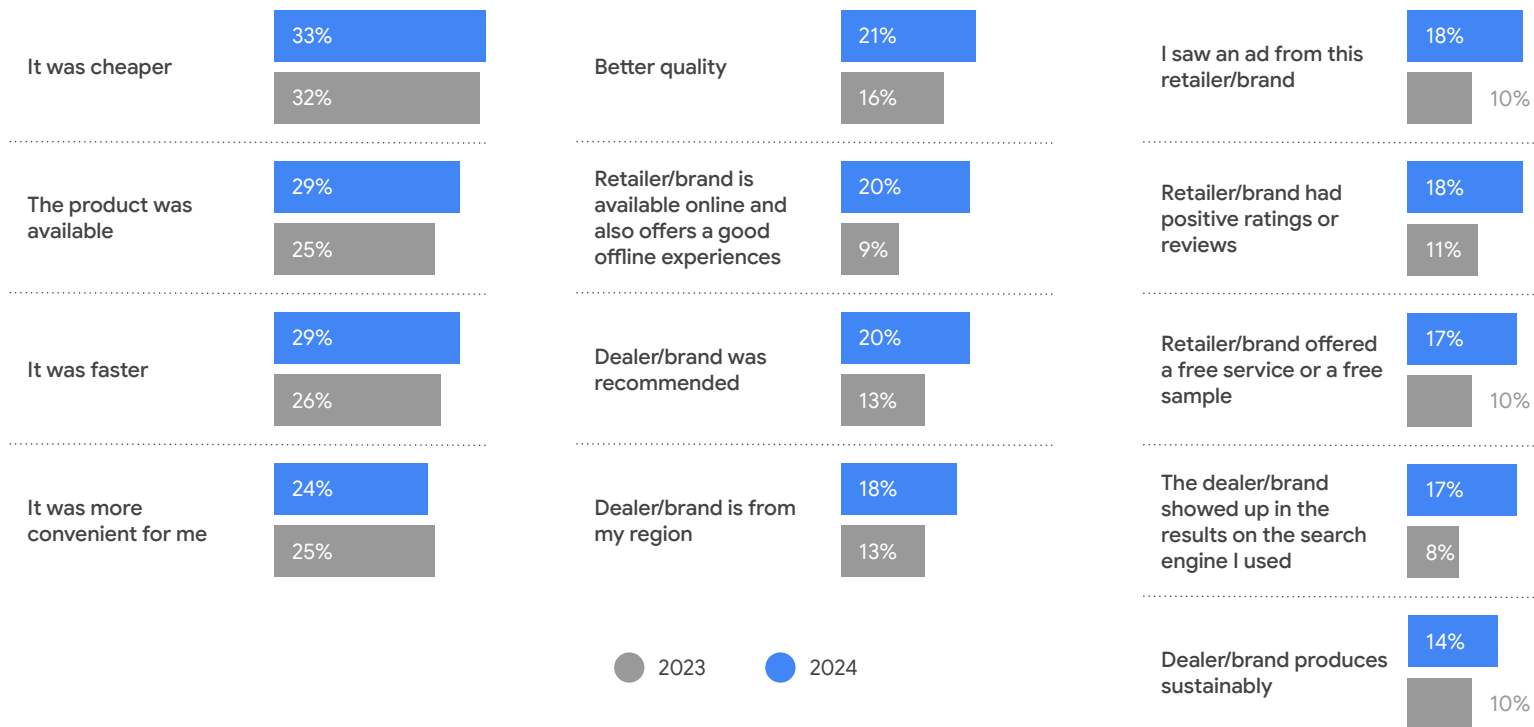
2024



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=698, CE n=82, Home n=87, Fashion n=129, Food n=142, Beauty n=124, Toys n=52, Jewellery n=81, Q33_1 Thinking about that new purchase, where did you buy the product from for the first time?

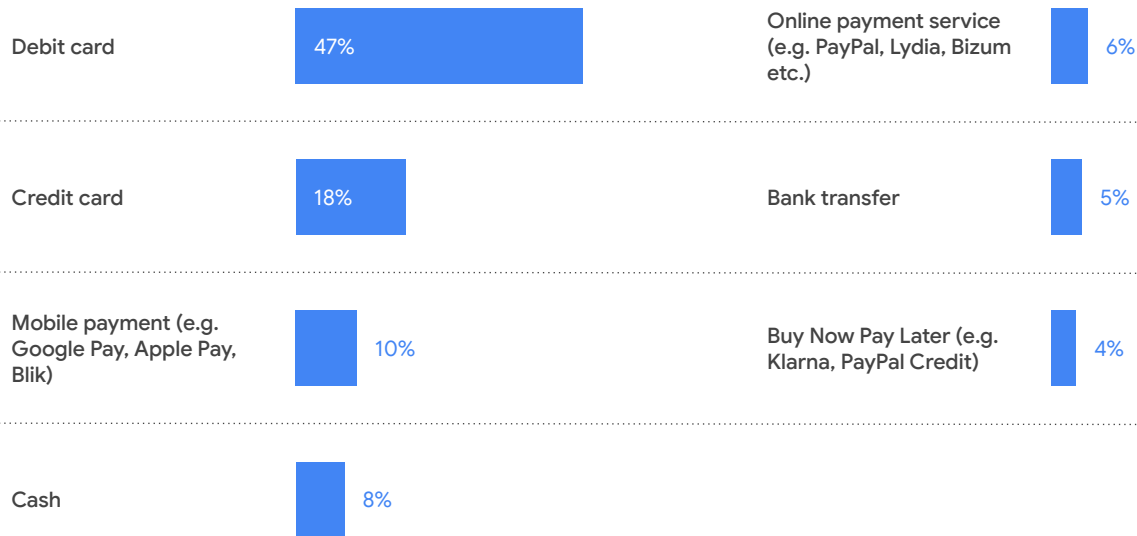
Reasons for purchasing from a new store



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=698/619, 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

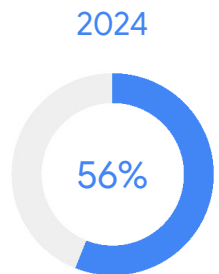


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.

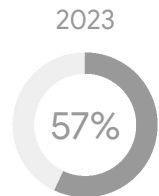
Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=2104, Q43: Thinking again about the last product within the category that you bought, how did you pay for the product?

Online buyers: respondents experiencing pain points

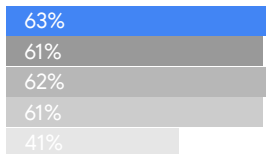
● 2019 ● 2021 ● 2022 ● 2023 ● 2024



AVERAGE OF VERTICALS



Consumer Electronics



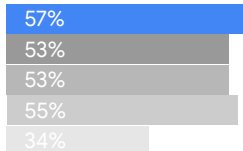
Food & Groceries



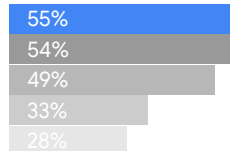
Jewellery



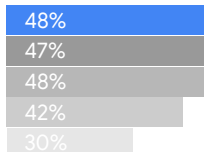
Home & Garden



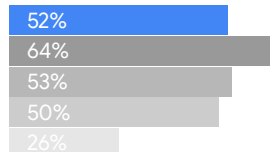
Beauty



Fashion

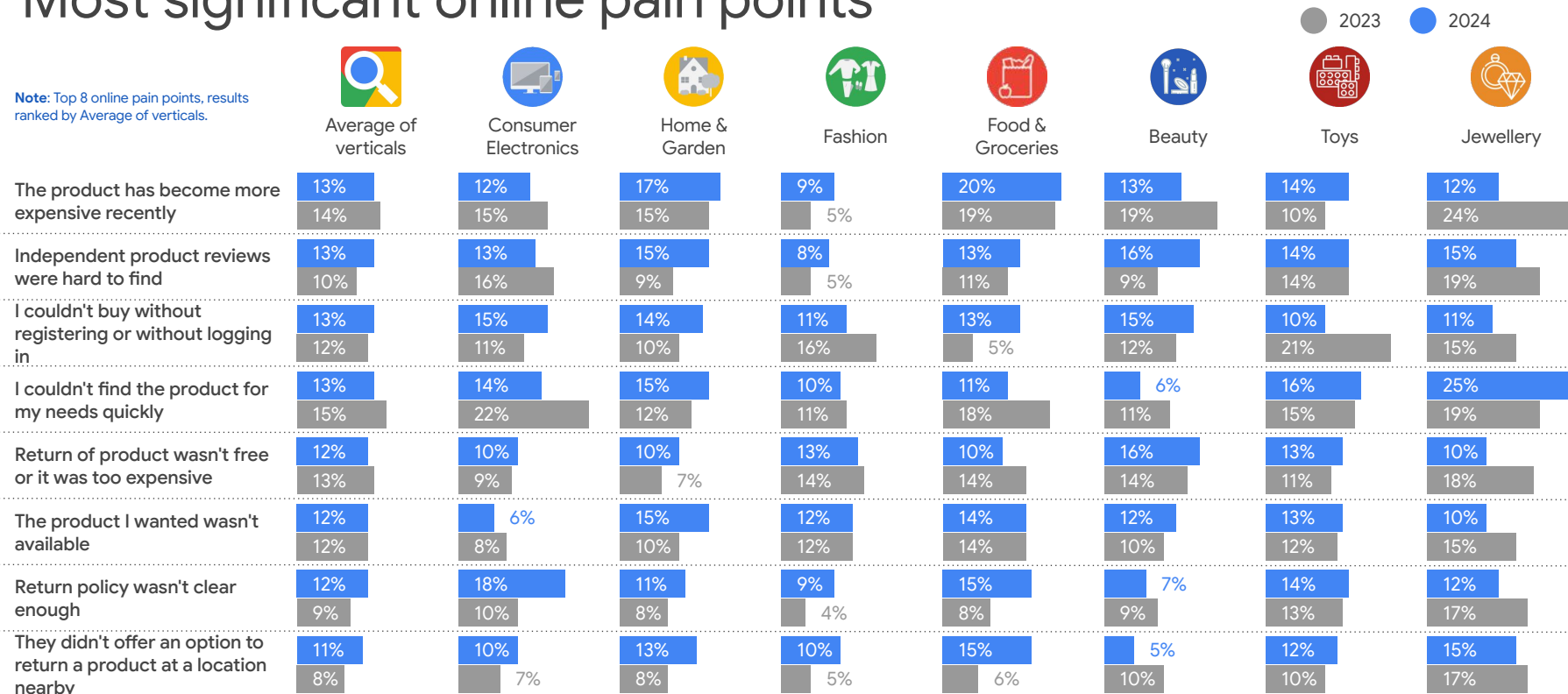


Toys



Most significant online pain points

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

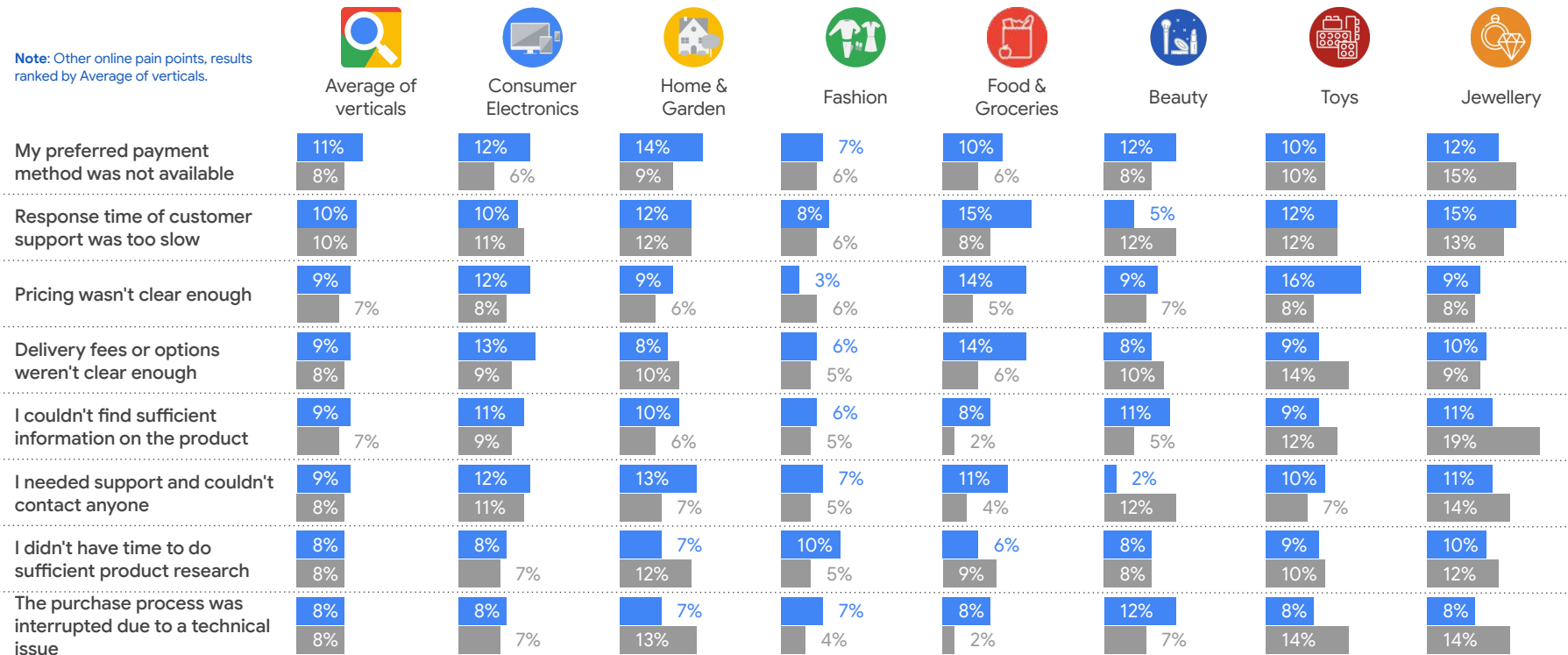


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
 Base 2024/2023: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1018/940, CE n=123/112, Home n=132/121, Fashion n=257/229, Food n=162/149, Beauty n=155/148, Toys n=85/76, Jewellery n=103/104, 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.

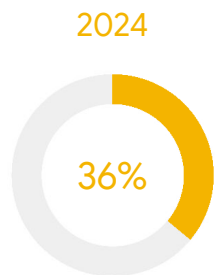
● 2023 ● 2024



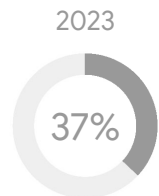
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.
 Base 2024/2023: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1018/940, CE n=123/112, Home n=132/121, Fashion n=257/229, Food n=162/149, Beauty n=155/148, Toys n=85/76, Jewellery n=103/104, Q4: Which of these situations did you experience during your purchase, if any?

Offline buyers: respondents experiencing pain points

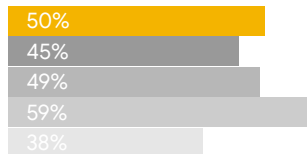
● 2019 ● 2021 ● 2022 ● 2023 ● 2024



AVERAGE OF VERTICALS



Consumer Electronics



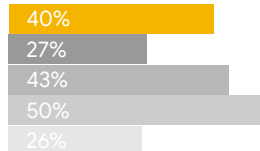
Food & Groceries



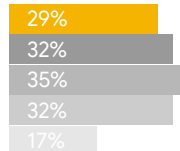
Jewellery



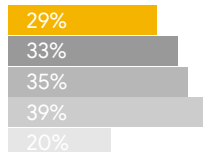
Home & Garden



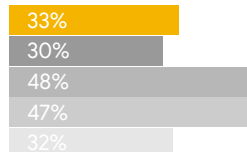
Beauty



Fashion



Toys

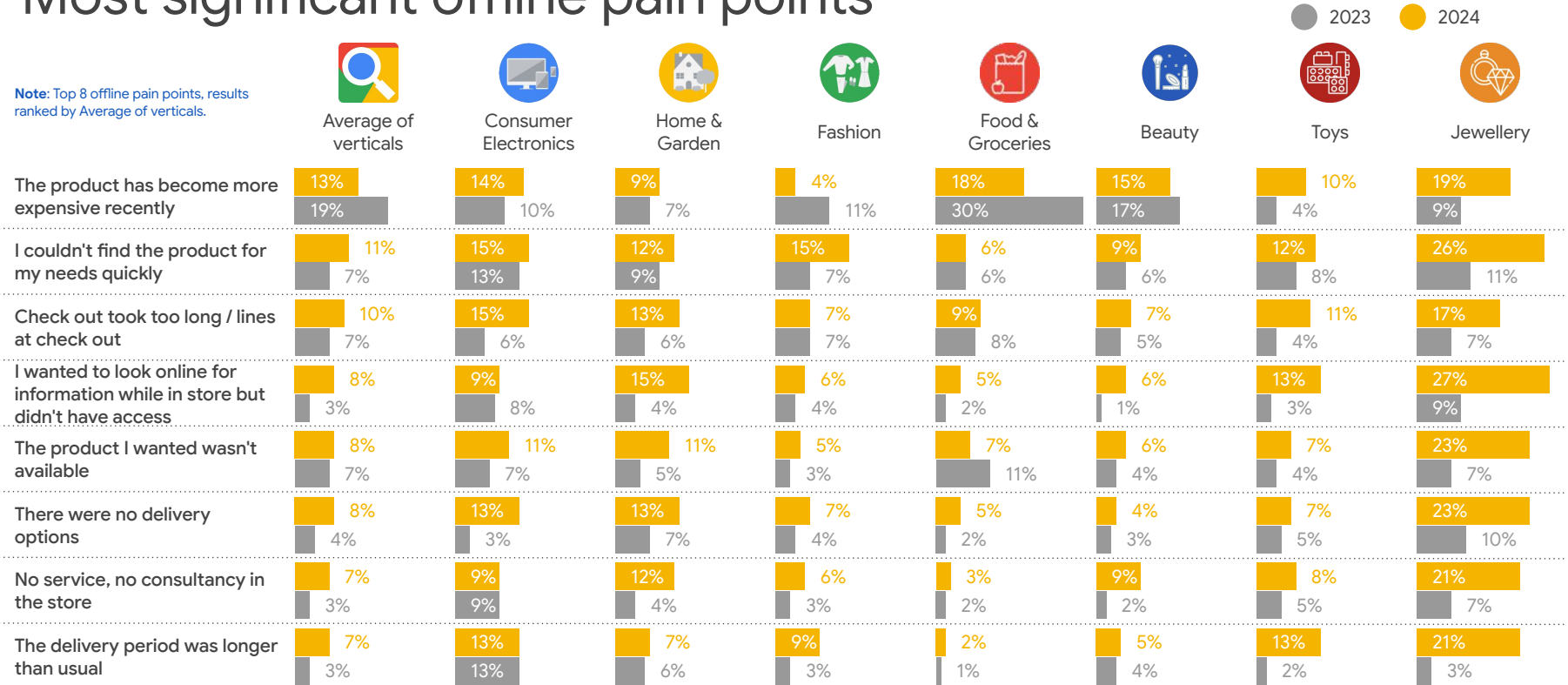


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=1087/1168/1333/1035/1122, CE n=80/70/113/117/167, Home n=127/111/168/185/204, Fashion n=178/204/225/304/307, Food n=384/462/412/0/0, Beauty n=197/229/268/329/354, Toys n=61/52/70/99/91, Jewellery n=59/41/78/0/0, Q4: Which of these situations did you experience during your purchase, if any?

Most significant offline pain points

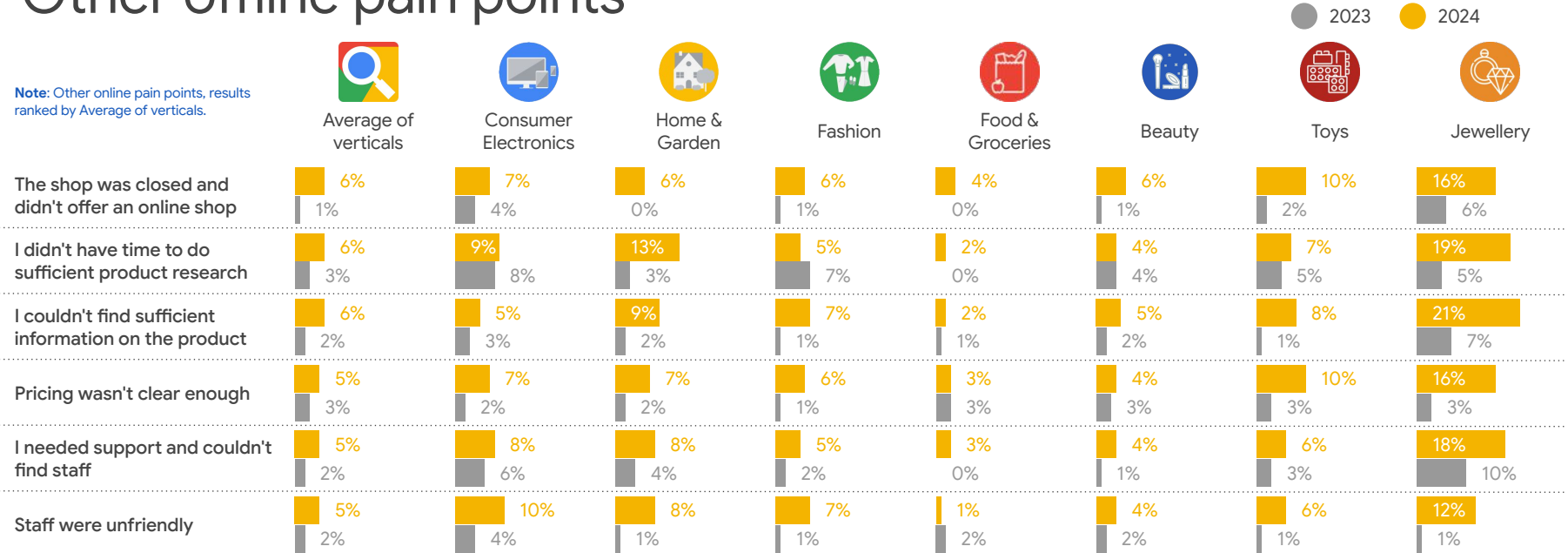
Note: Top 8 offline pain points, results ranked by Average of verticals.



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=1087/1168, CE n=80/70, Home n=127/111, Fashion n=178/204, Food n=384/462, Beauty n=197/229, Toys n=61/52, Jewellery n=59/41, Q4: Which of these situations did you experience during your purchase, if any?

Other offline pain points

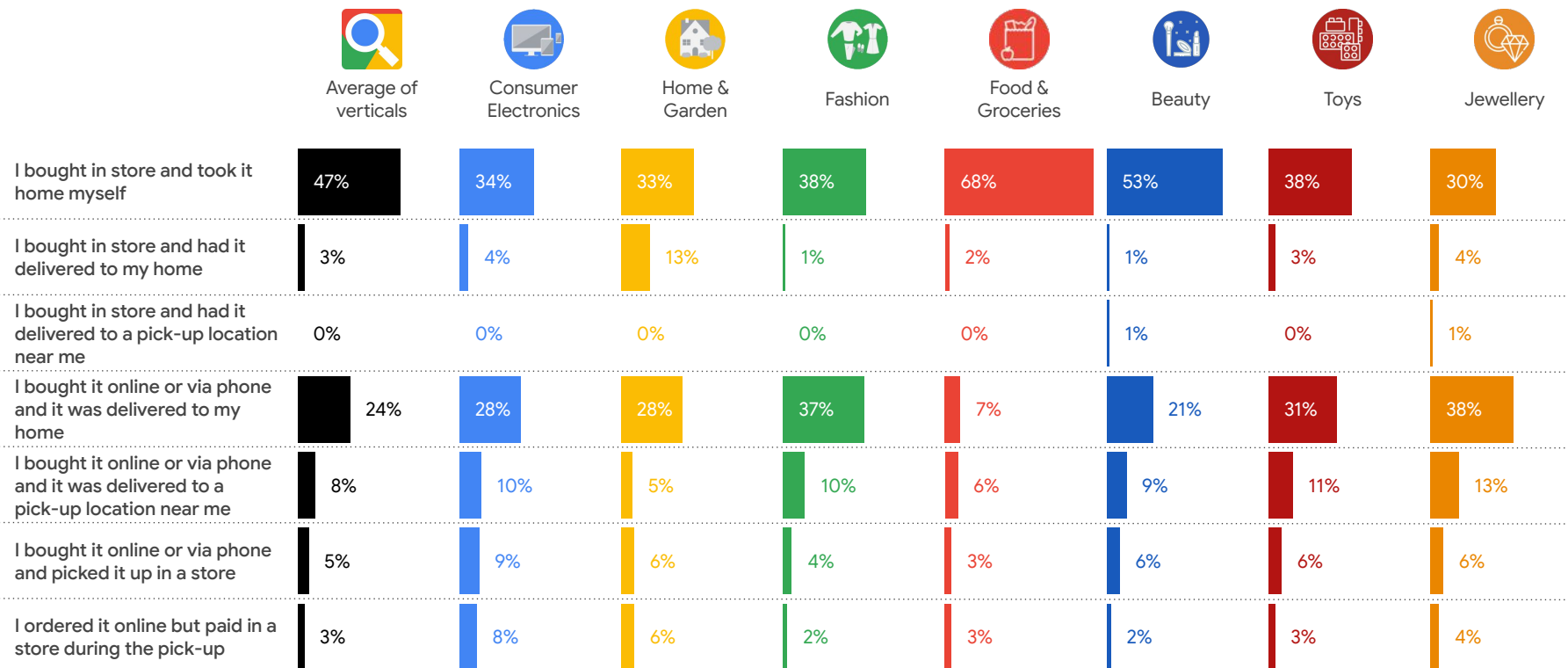
Note: Other online pain points, results ranked by Average of verticals.



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=1087/1168, CE n=80/70, Home n=127/111, Fashion n=178/204, Food n=384/462, Beauty n=197/229, Toys n=61/52, Jewellery n=59/41, Q4: Which of these situations did you experience during your purchase, if any?

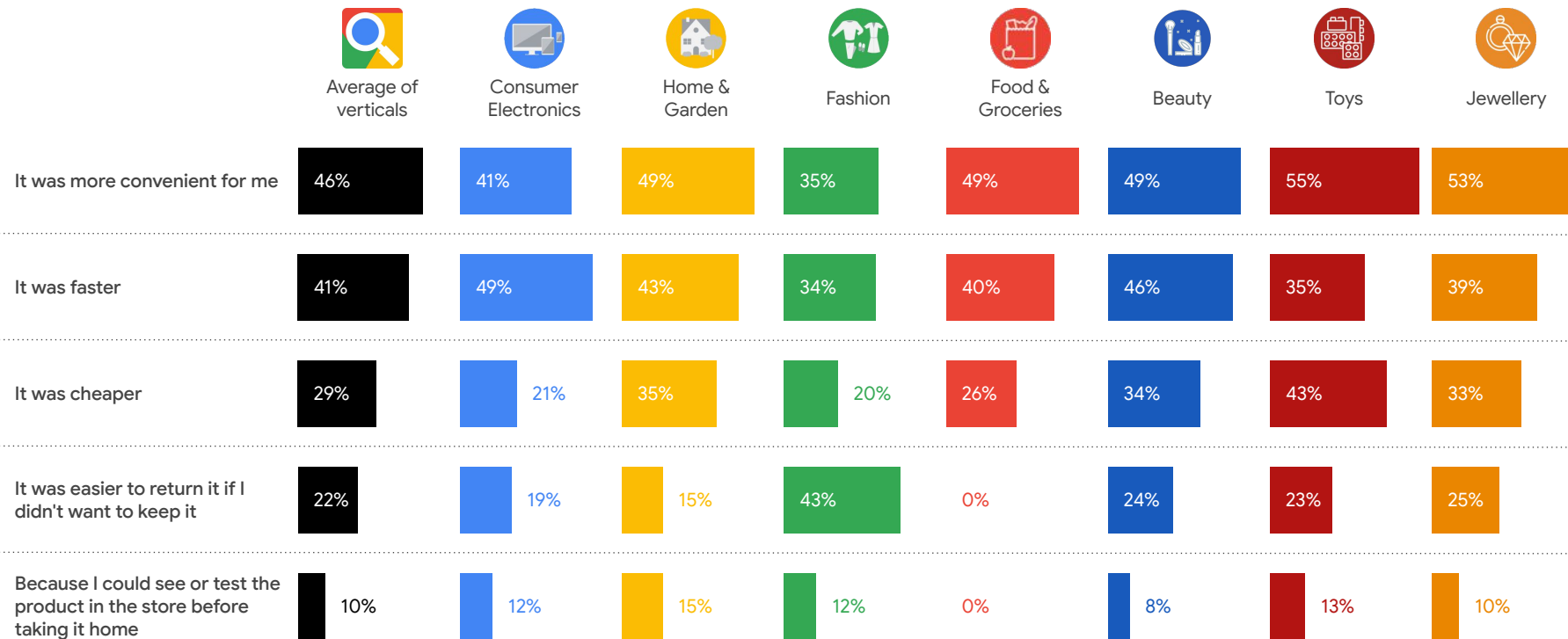
Ways of obtaining the product

2024



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=203, Home n=258, Fashion n=435, Food n=547, Beauty n=353, Toys n=146, Jewellery n=162, Q2_A. How did you get the product?

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



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=357, CE n=58, Home n=44, Fashion n=68, Food n=62, Beauty n=60, Toys n=30, Jewellery n=36, 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



Average of verticals



Consumer Electronics



Home & Garden



Fashion



Beauty

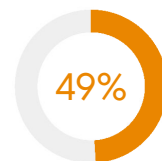
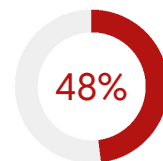
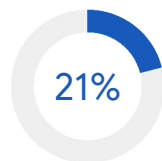
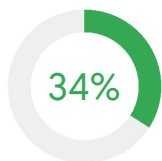
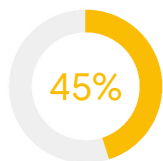
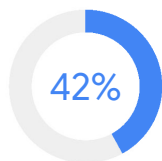
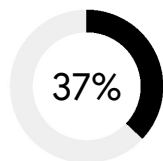


Toys

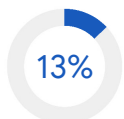
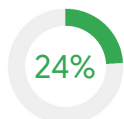
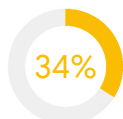
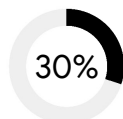


Jewellery

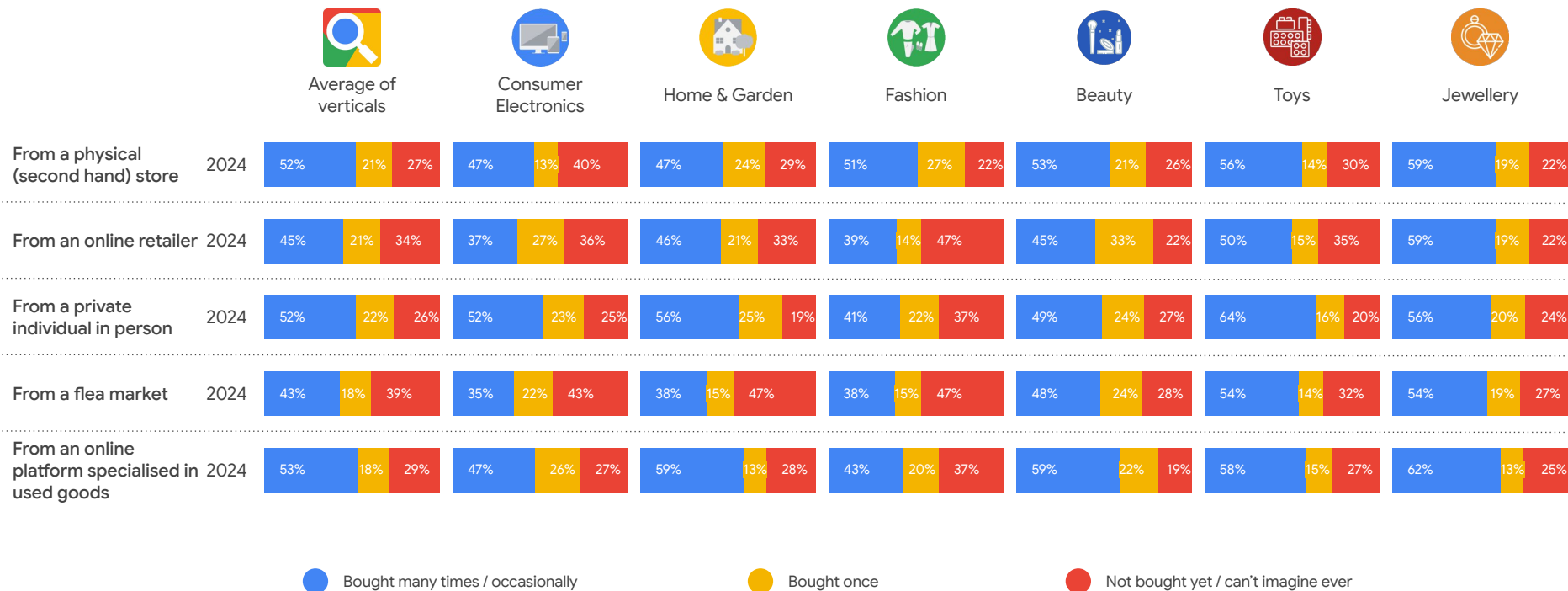
2024



2023

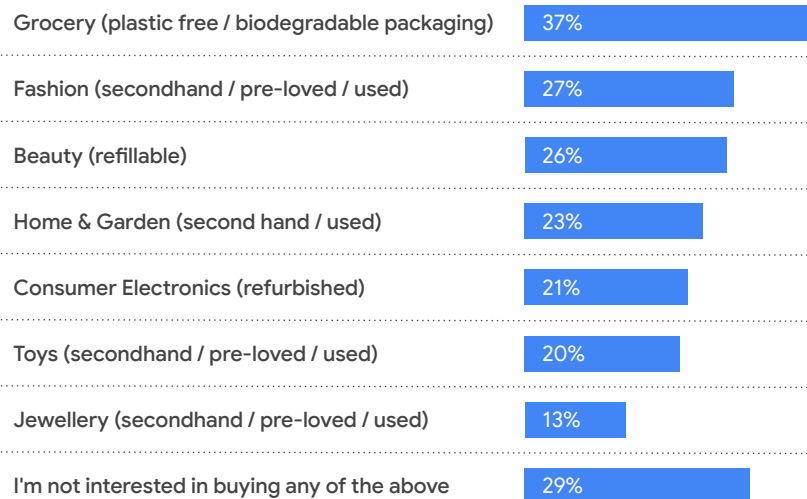


Location and frequency of purchasing used goods

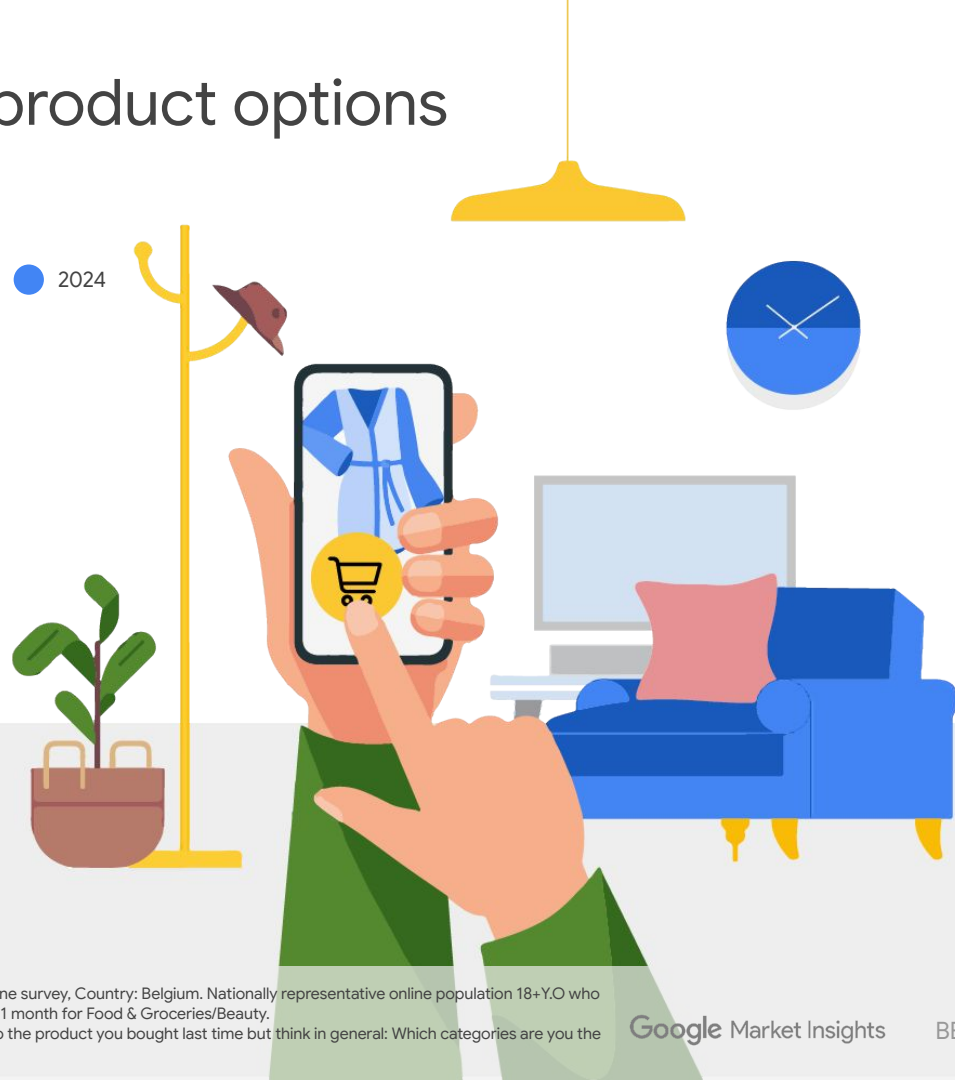


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+ Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty. Base 2024: Buyers of used goods of CE, Home, Fashion, Beauty, Toys, Jewellery n=571, CE n=86, Home n=115, Fashion n=147, Beauty n=73, Toys n=70, Jewellery n=79, Q101. Where and how often have you bought used goods?

Overall interest in sustainable product options



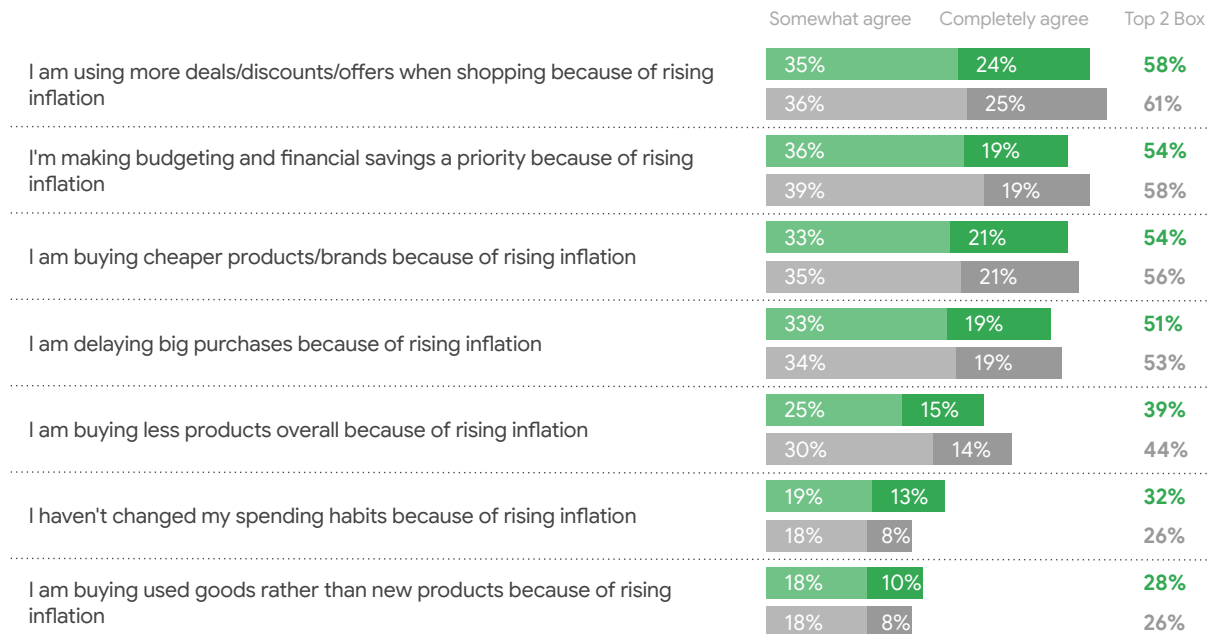
Note: Results show Average of verticals



Impact of cost of living

● 2023

● 2024 **Average of all Verticals**

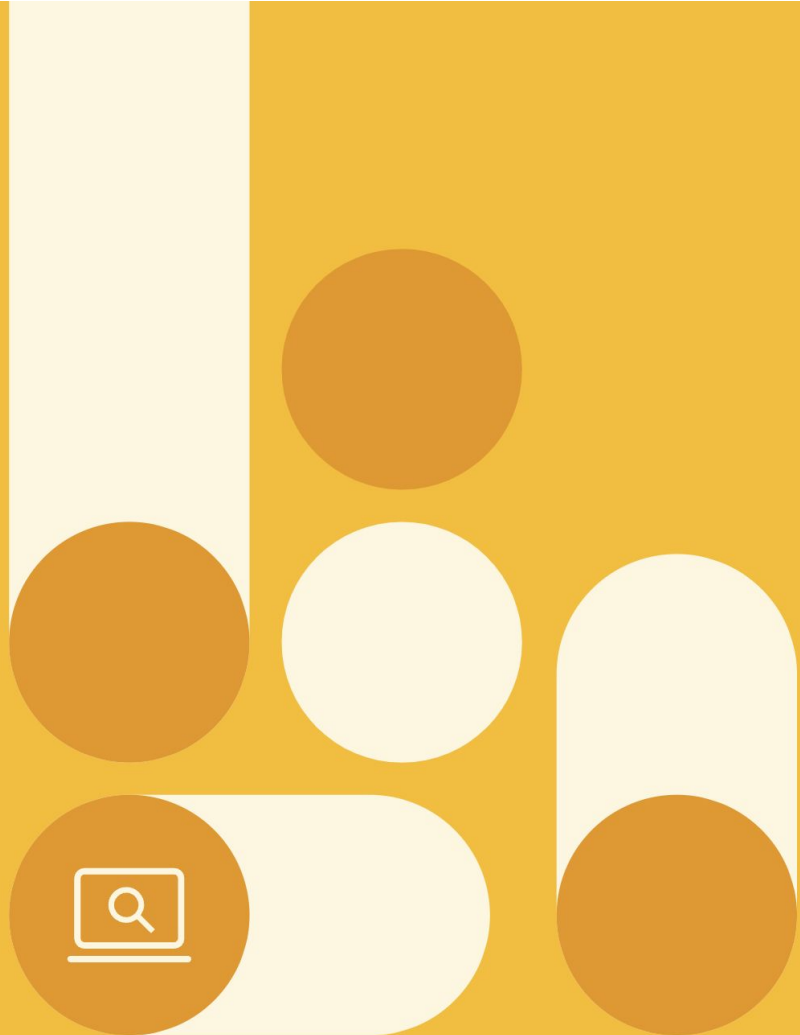


Note: Results show Top 2 boxes (somewhat agree & completely agree) ranked by average of all verticals in 2024. In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

Chapter 2

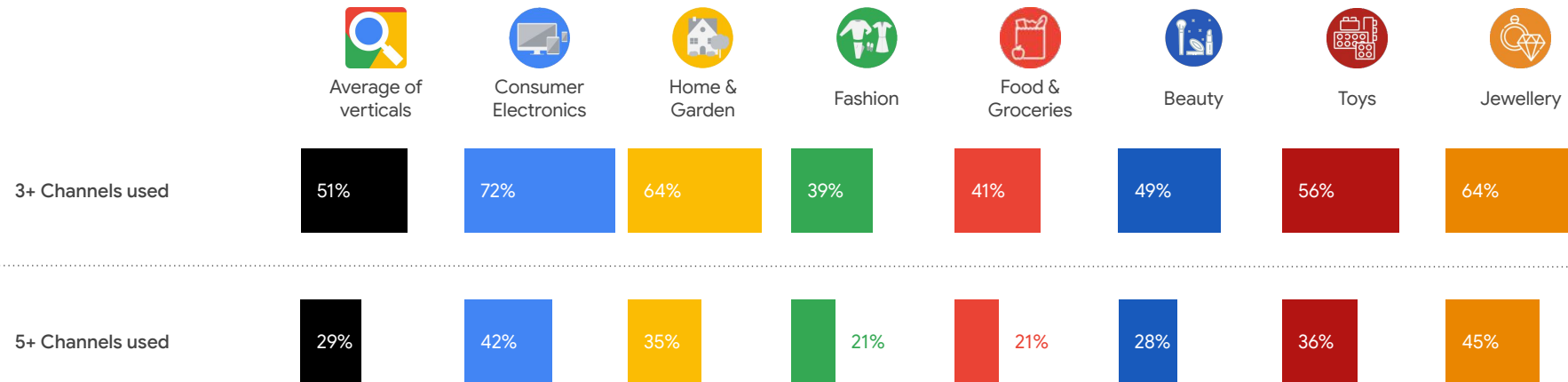
Product Discovery & Research

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



Channel usage during the shopping journey

2024

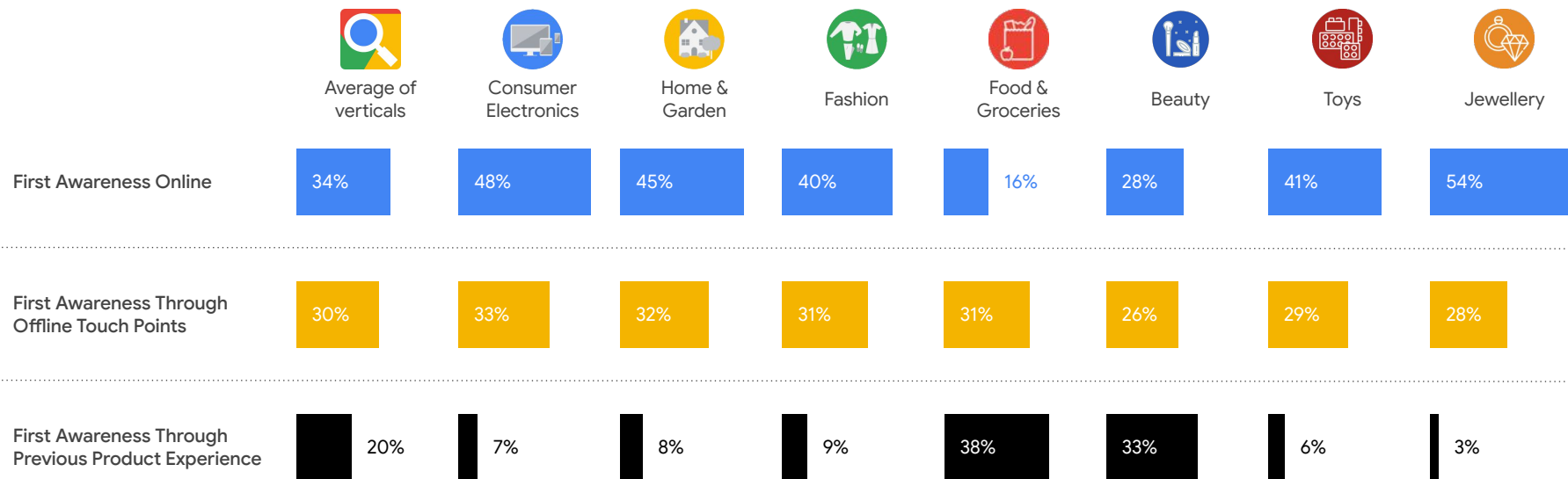


Note: These percentages indicate the proportion of respondents who used at least 3 channels or at least 5 channels out of 9 channels from a list

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=203, Home n=258, Fashion n=435, Food n=547, Beauty n=353, Toys n=146, Jewellery n=162, 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



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: Belgium. 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=203, Home n=258, Fashion n=435, Food n=547, Beauty n=353, Toys n=146, Jewellery n=162, Q7: How did you first become aware of the product you purchased?

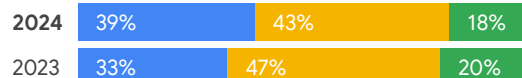
What comes first - retailer or brand?



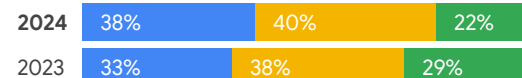
Consumer Electronics



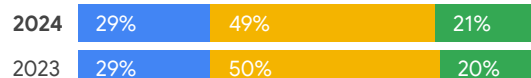
Food & Groceries



Jewellery



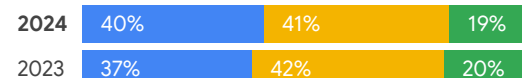
Home & Garden



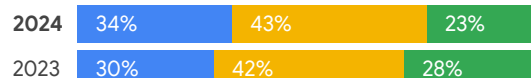
Beauty



AVERAGE OF ALL VERTICALS



Fashion



Toys

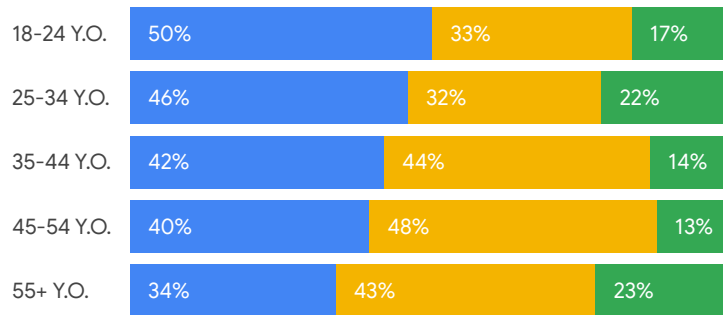


- I already knew the **brand** I wanted to buy from
- I already knew the **retailer** I wanted to buy from
- I don't know/remember

What comes first - retailer or brand?



AVERAGE OF ALL VERTICALS



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

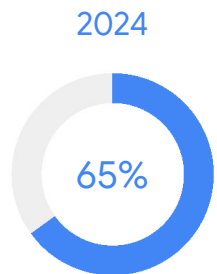


Note: 2024 results

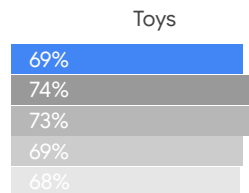
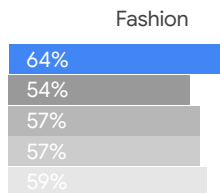
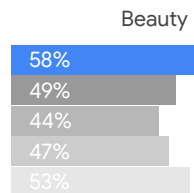
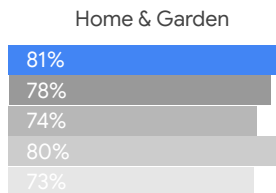
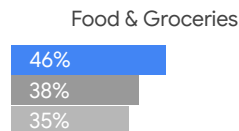
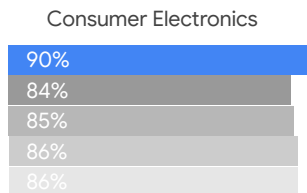
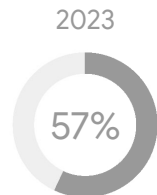
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+ Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2108, 18-24 n=281/286, 25-34 n=367/367, 35-44 n=363/363, 45-54 n=380/380, 55+ n=714/713, 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 ● 2021 ● 2022 ● 2023 ● 2024



AVERAGE OF VERTICALS

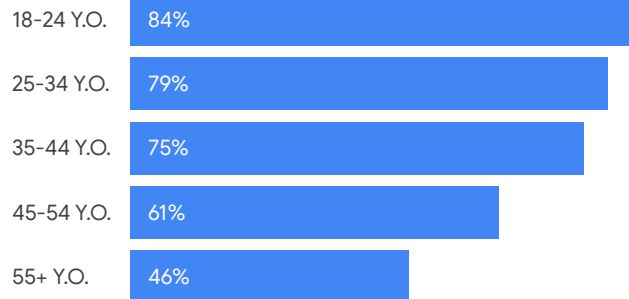


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2108/2207/1559/1575, CE n=203/183/226/204/272, Home n=258/232/292/283/277, Fashion n=435/432/460/490/466, Food n=547/611/514/0/0, Beauty n=353/377/392/425/423, Toys n=146/128/136/158/136, Jewellery n=162/145/187/0/0, 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



AVERAGE OF ALL VERTICALS



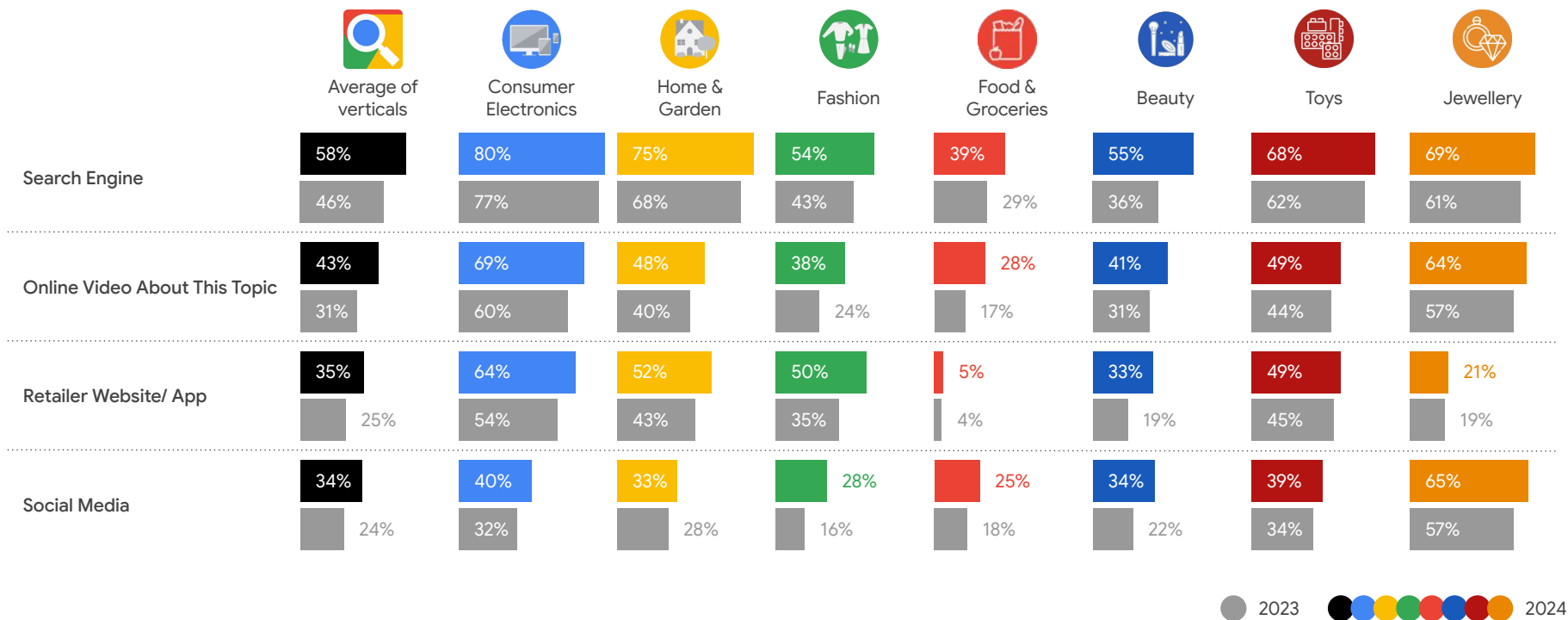
● 2024



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=281, 25-34 n=367, 35-44 n=363, 45-54 n=380, 55+ n=714, 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

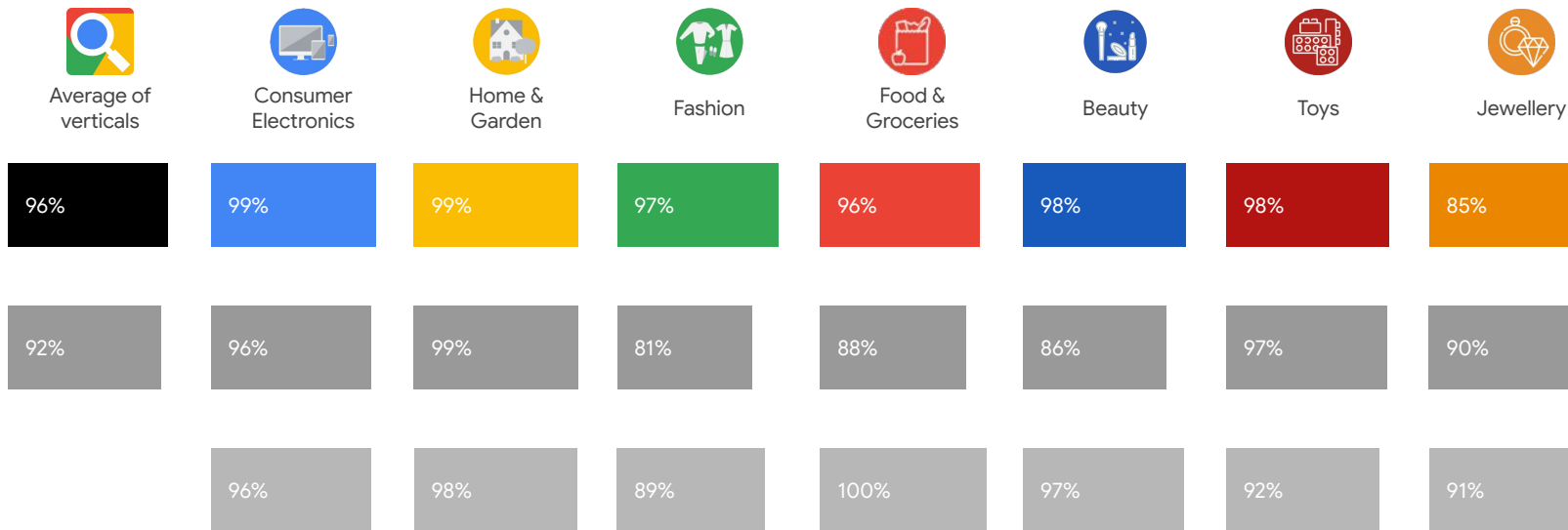


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2108, CE n=203/183, Home n=258/232, Fashion n=435/432, Food n=547/611, Beauty n=353/377, Toys n=146/128, Jewellery n=162/145, 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:



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=350/284/249, CE n=51/55/59, Home n=68/55/52, Fashion n=56/42/39, Food n=44/41/19, Beauty n=61/32/32, Toys n=29/31/25, Jewellery n=41/28/24, Q9A. You mentioned you researched the product you purchased on a search engine. Which search engine(s) were you using?

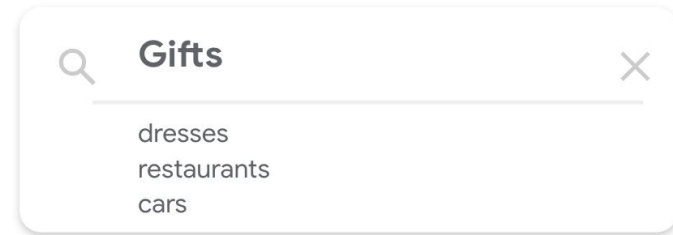
Consumers express their demands through “modifiers”

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

Topic

What the user is interested in

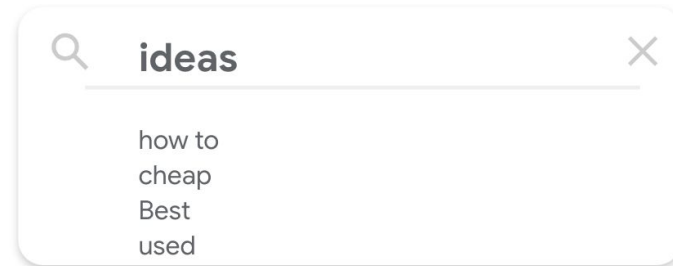
Examples:



Modifiers

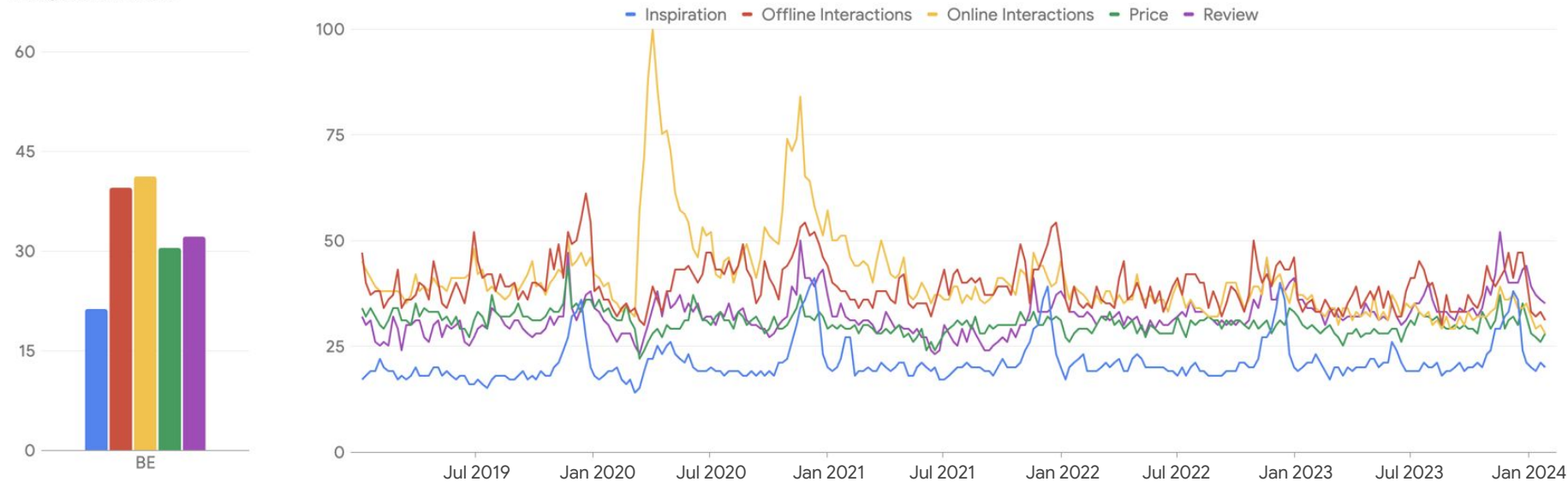
What users want to know about a topic

Examples:



Search interest of popular modifiers in the shopping category

Average Search Interest

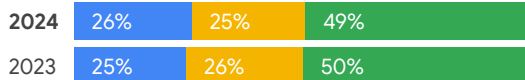


[Source: Google Trends \(Jan 2019 - Jan 2024\)](#) - translated modifiers (into local languages) have been used for each market. Shown in English here for simplicity reasons:

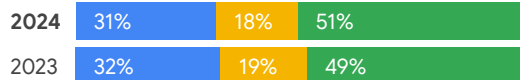
Retailtainment



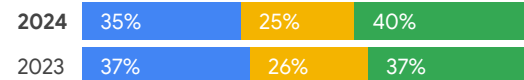
Consumer Electronics



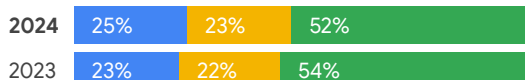
Food & Groceries



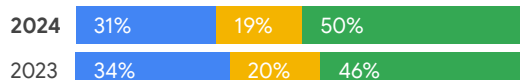
Jewellery



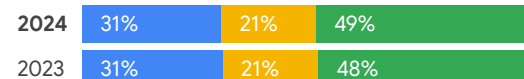
Home & Garden



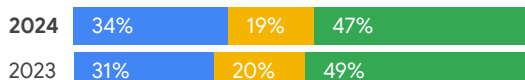
Beauty



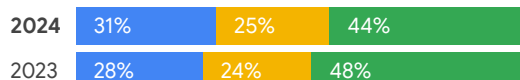
AVERAGE OF ALL VERTICALS



Fashion

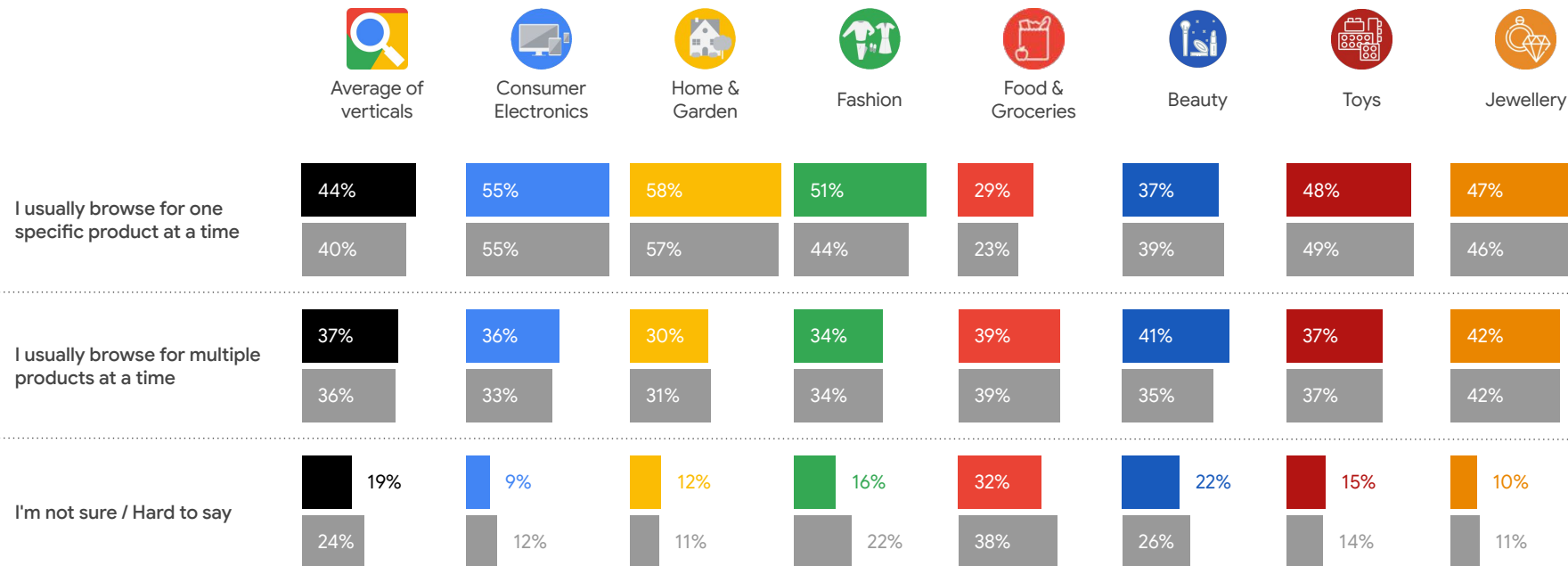


Toys



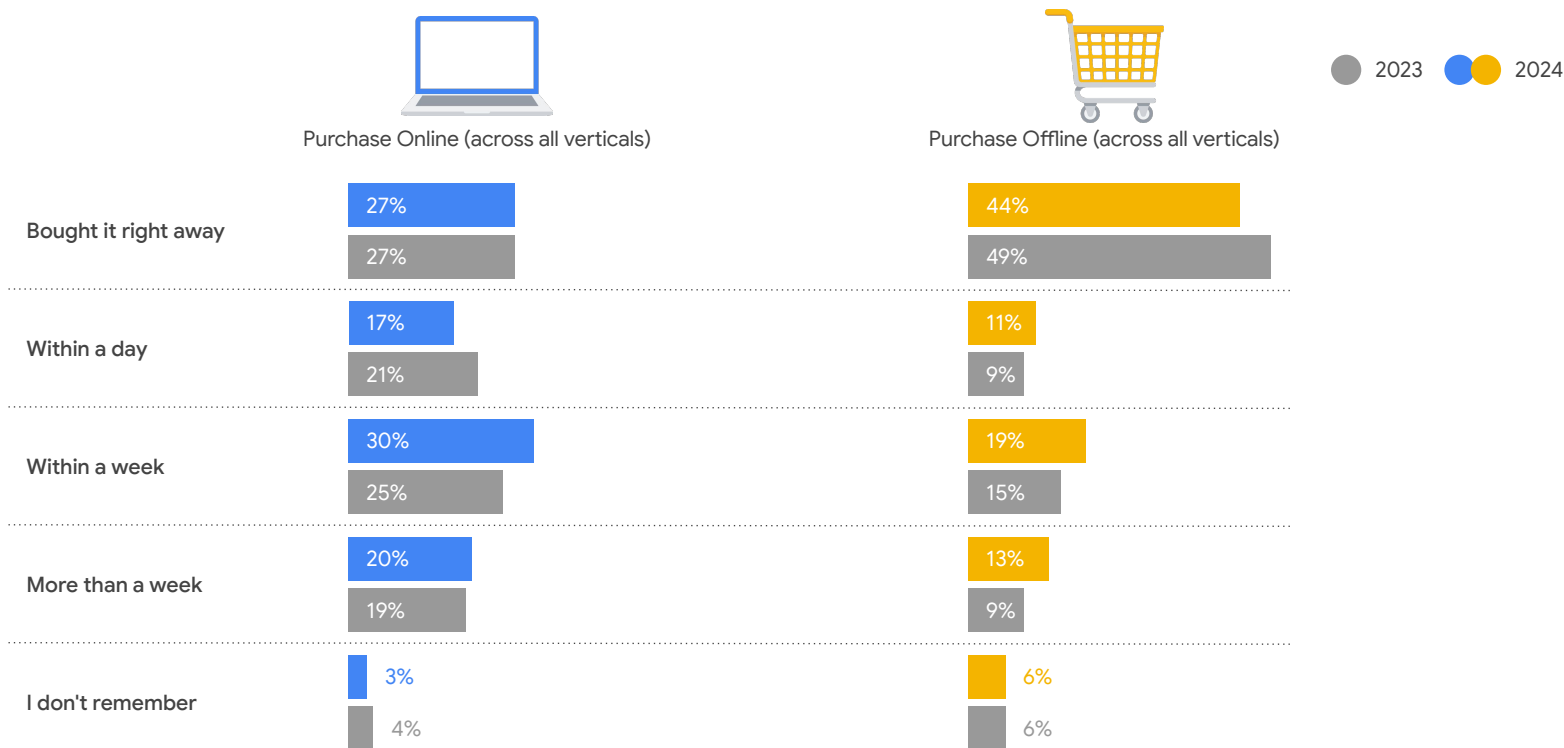
- Just browsing for fun
- Browsing for inspiration for a later purchase
- Actively browsing for a product you plan to buy

Product browsing behavior



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=2104/2108, CE n=203/183, Home n=258/232, Fashion n=435/432, Food n=547/611, Beauty n=353/377, Toys n=146/128, Jewellery n=162/145, 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?

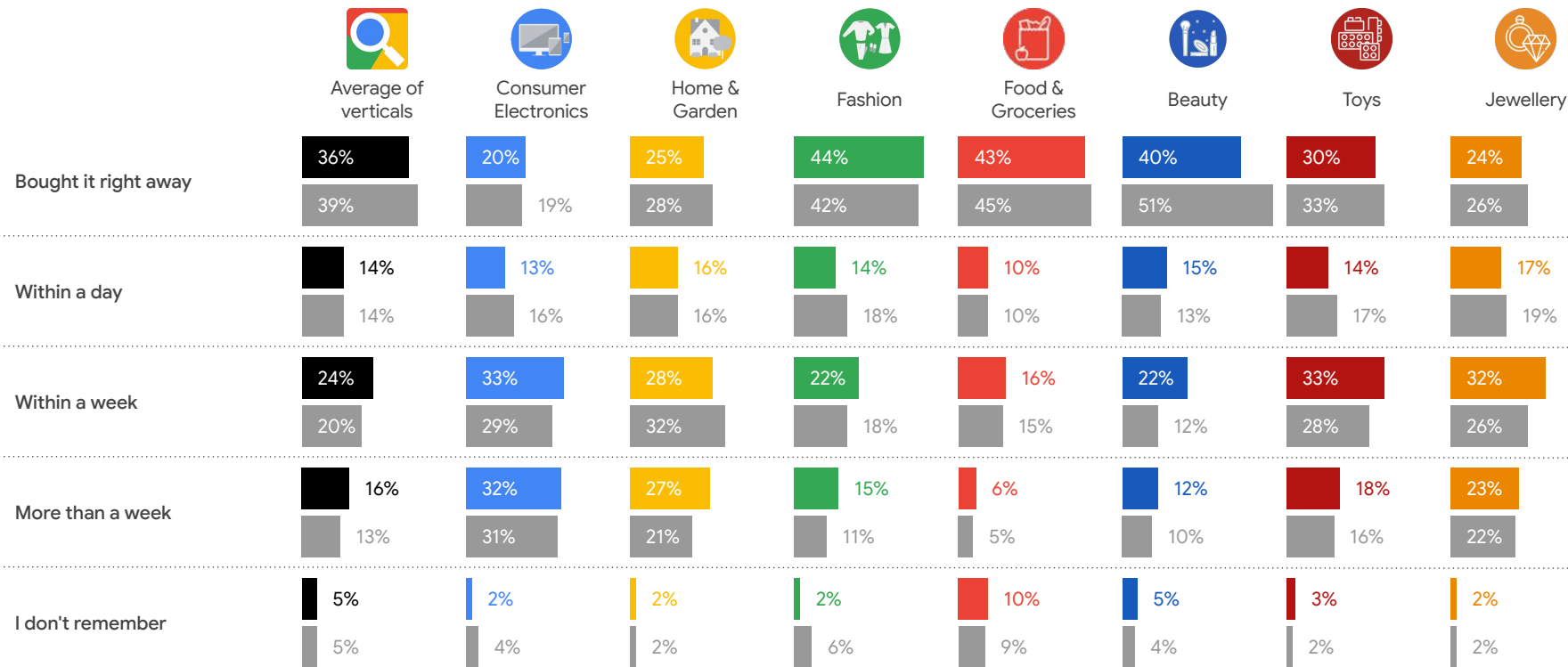
Length of product research: online vs. offline purchase



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=2104/2108, 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



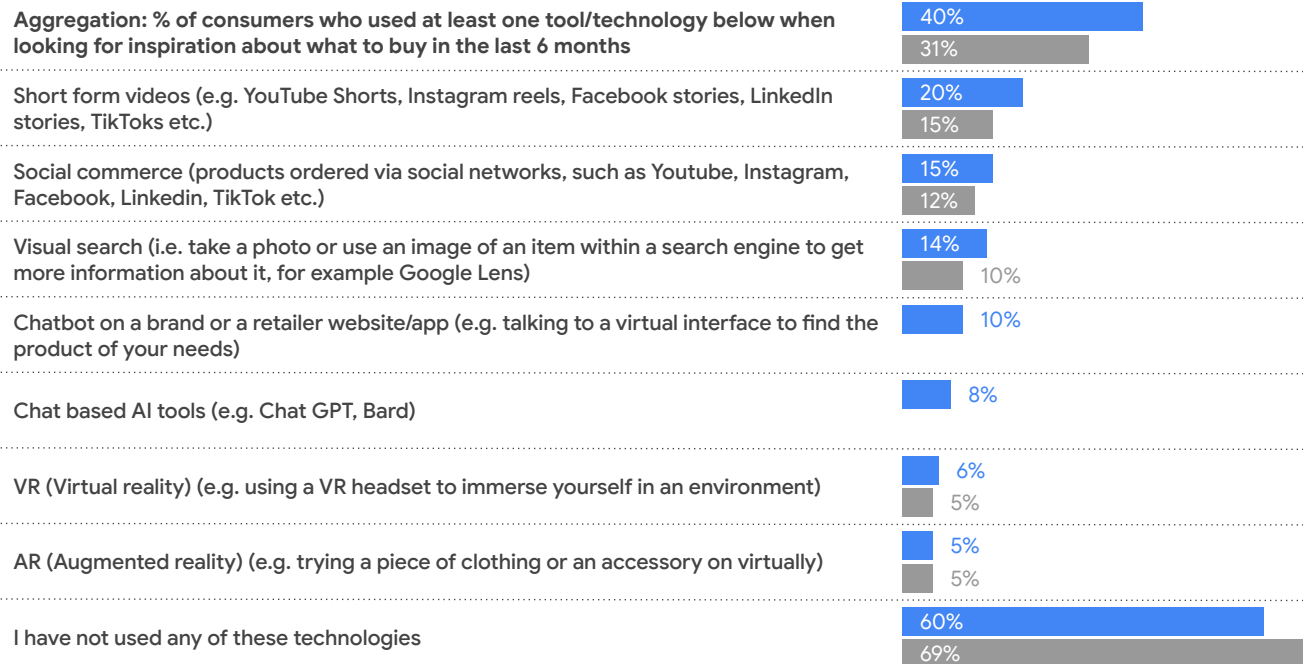
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2108, CE n=203/183, Home n=258/232, Fashion n=435/432, Food n=547/611, Beauty n=353/377, Toys n=146/128, Jewellery n=162/145, 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

2023

2024



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=2104/2108, 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

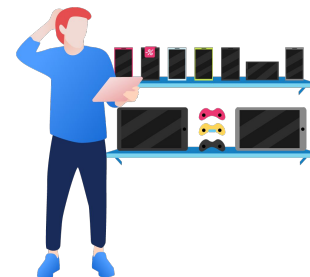
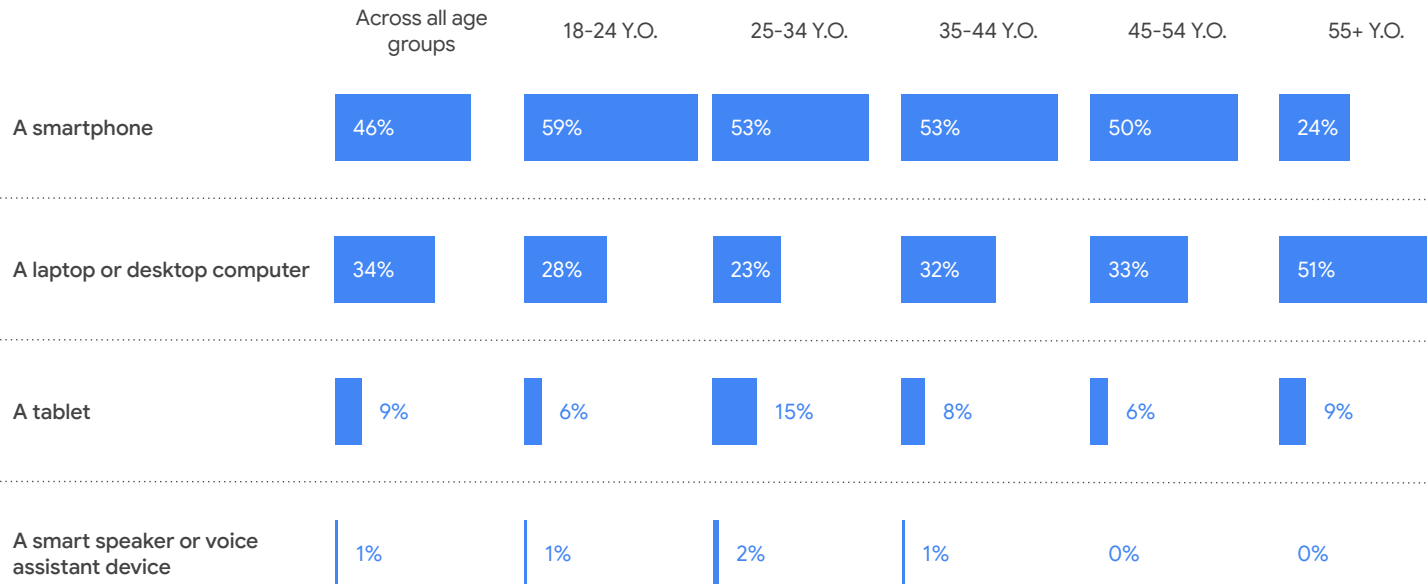
- Devices used for online purchase [\[link\]](#)
- Smartphone usage during product research [\[link\]](#)
- Smartphone usage during online shopping [\[link\]](#)
- Purchases via smartphones: websites vs. apps [\[link\]](#)
- Shopping app installations [\[link\]](#)
- Food & Groceries: delivery apps usage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



Devices used for online purchase

Note: Results show Average of verticals

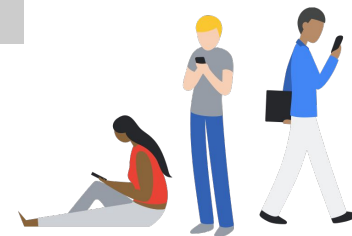
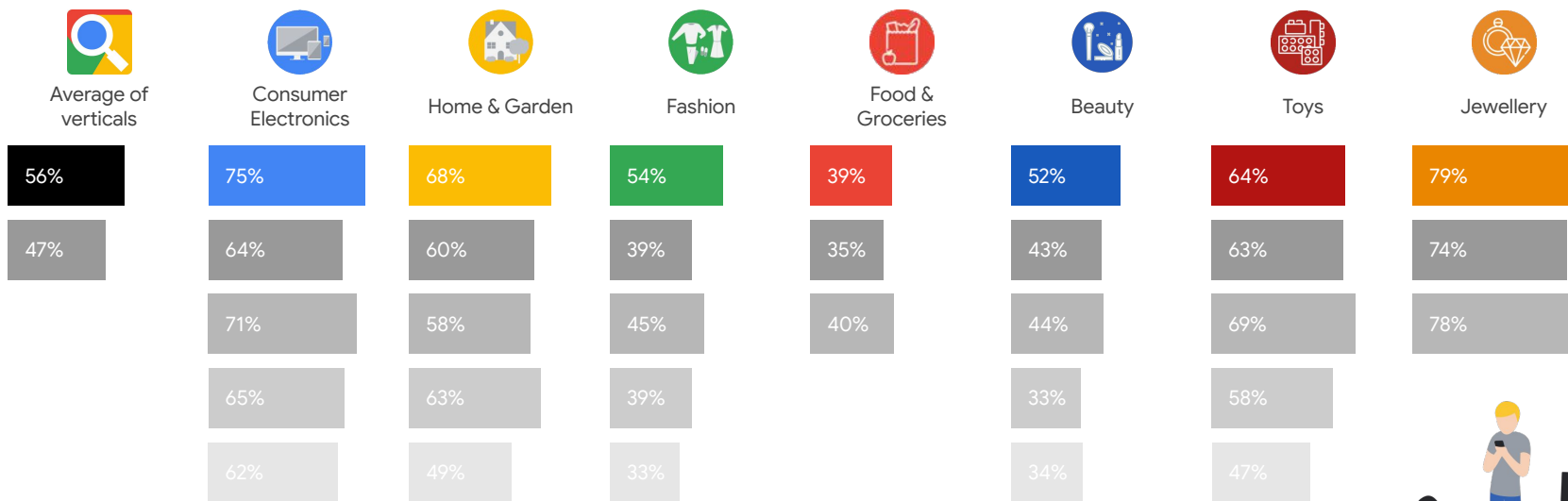
2024



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=1017, 18-24 n=167, 25-34 n=244, 35-44 n=168, 45-54 n=178, 55+ n=260, Q3. Which device did you use for your online purchase?

Smartphone usage during product research

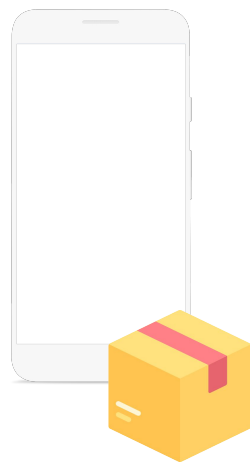
● 2019 ● 2021 ● 2022 ● 2023 ● 2024



Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. 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=1858/1898/1945/1280/1264, CE n=187/167/206/163/238, Home n=232/214/263/235/228, Fashion n=389/395/406/388/359, Food n=456/534/433/0/0, Beauty n=317/339/344/361/324, Toys n=133/119/127/132/114, Jewellery n=145/130/164/0/0, 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



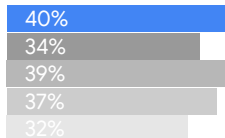
Average of
verticals

46%

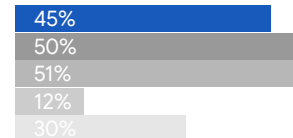
use their
smartphone when
making an online
purchase across all
verticals



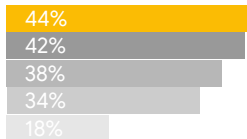
Consumer
Electronics



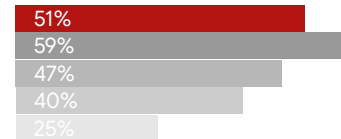
Beauty



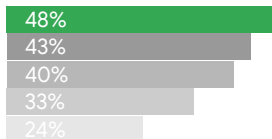
Home &
Garden



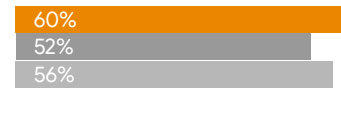
Toys



Fashion



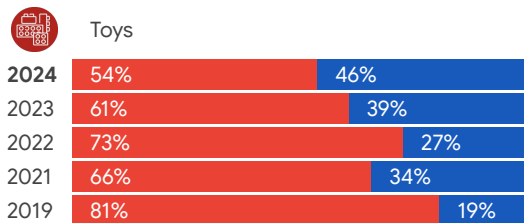
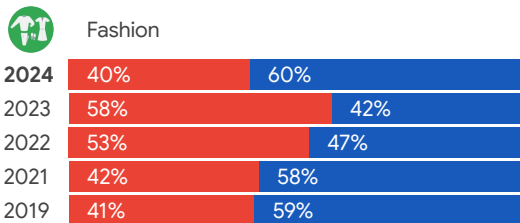
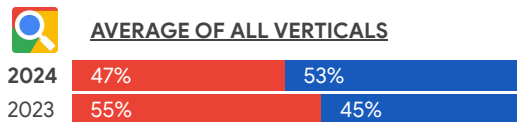
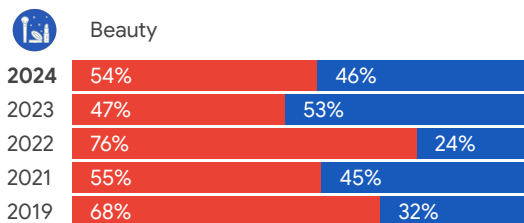
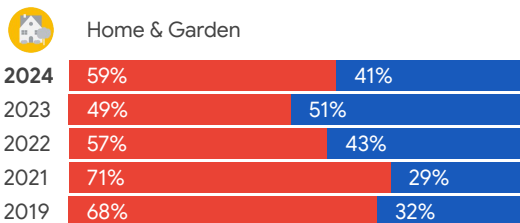
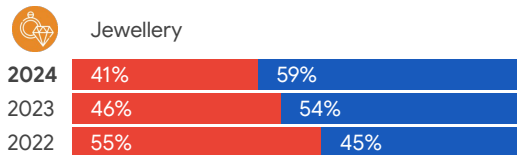
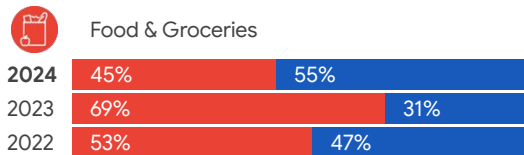
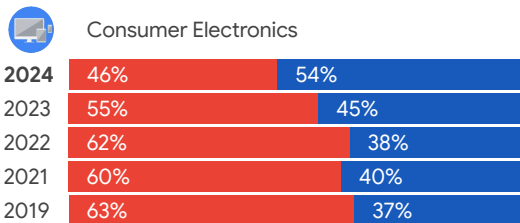
Jewellery



Food &
Groceries



Purchases via smartphones: websites vs. apps

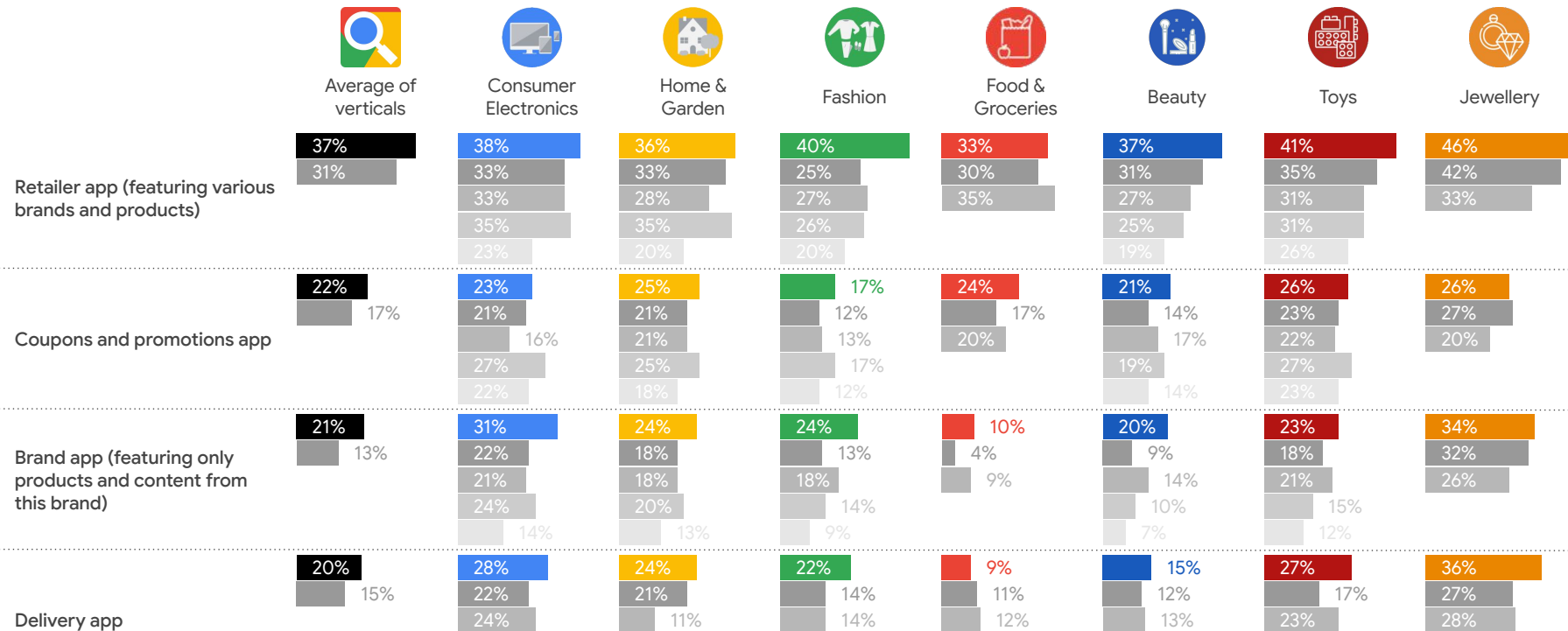


 Website  App

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

Shopping app installations

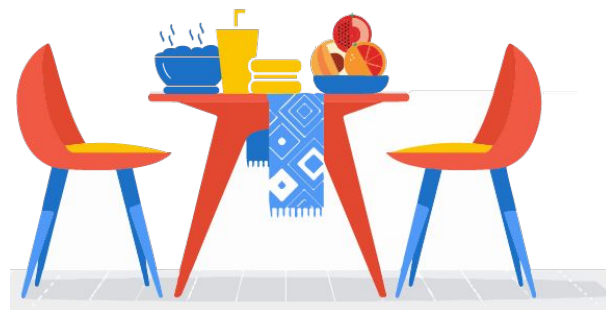
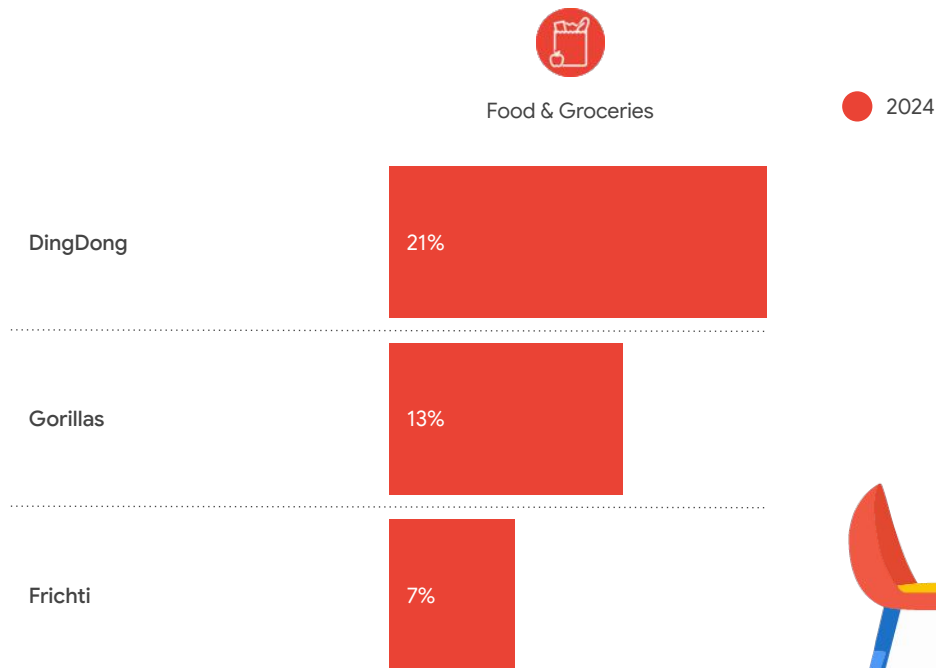
● 2019 ● 2021 ● 2022 ● 2023 ● 2024

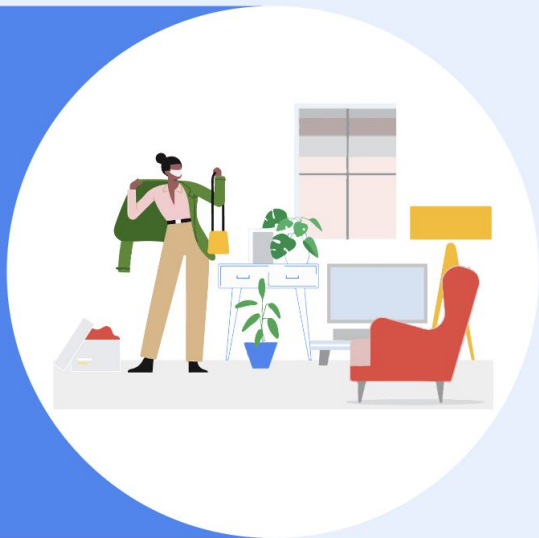


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2108/2207/1256/1264, CE n=203/183/226/160/238, Home n=258/232/292/228/228, Fashion n=435/432/460/381/359, Food n=547/611/514/0/0, Beauty n=353/377/392/357/324, Toys n=146/128/136/130/114, Jewellery n=162/145/187/0/0, Q20: Which of these shopping apps have you installed on your smartphone, if any?

Food & Groceries: delivery apps usage





Smart
Shopper
2024