Smart Shopper 2024

Belgium country report

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by EMEA Market Insights



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Study background and methodology

Background:

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

Target population and category definition:

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

Look-back window for purchases:

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

Sample size and sampling approach:

N = 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.

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2024 Key stats for Belgium across all verticals







Channel agnostic buyers who are not fully set on one channel

32[%] Research online and purchase offline



Experienced online pain points during their shopping journey





.) 58% Used a search engine prior to their last purchase

96[%]
 Used Google as a search engine for product research

40% Used new tools/technologies when looking for inspiration about what to buy in the last 6 months

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: BE. 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.

Google Market Insights

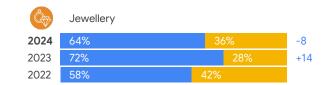
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- Overall interest in sustainable product options [link]
- Impact of cost of living [link]

Last purchase: online vs. offline

	Consumer Electro	nics	
2024	61%	39%	+/-0
2023	61%	39%	+11
2022	50%	50%	+8
2021	42%	58%	+3
2019	39%	61%	

	Food & Groceries		
2024	30%	70%	+6
2023	24%	76%	+4
2022	20%	80%	

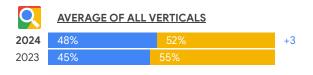


	Home & C	Garden	
2024	51%	49%	-1
2023	52%	48%	+10
2022	42%	58%	+8
2021	34%	66%	+7
2019	27%	73%	

ŢŢ	Fashion		
2024	59%	41%	+6
2023	53%	47%	+2
2022	51%	49%	+14
2021	37%	63%	+3
2019	34%	66%	

	Beauty	
2024	44% 5 6%	+5
2023	<u> </u>	+7
2022	32% 68%	+10
2021	22% 78%	+6
2019	16% 84%	

	Toys		
2024	58%	42%	-1
2023	59%	41%	+10
2022	49%	51%	+14
2021	35%	65%	+2
2019	33%	67%	

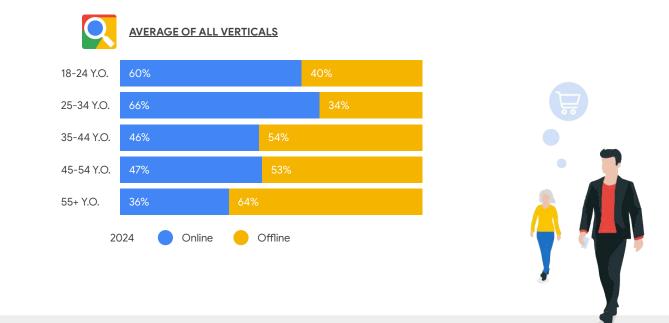




Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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, Q1: Where did you make your last purchase?

Last purchase: online vs. offline

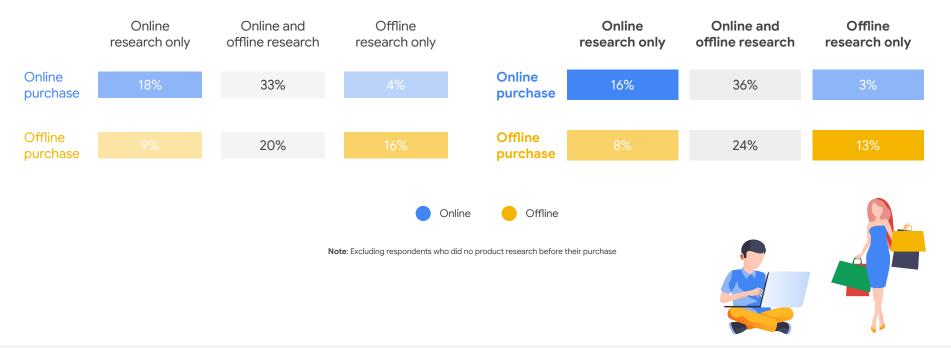


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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, Q1: Where did you make your last purchase?

ROPO matrix: 2023 & 2024

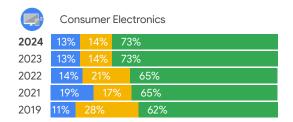
2023, Average across all verticals

2024, Average across all 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: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1615/1488, Aggregation of Q1_09_013: 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



	Home &	Garden	
2024	9% <mark>19%</mark>	72%	
2023	8% 23%	69%	
2022	12% 21	% 67%	
2021	13% 26	5 <mark>%</mark> 61%	
2019	<mark>6%</mark> 37%	57%	6

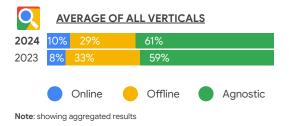
ŢI	Fashion		
2024	17% 15%	67%	
2023	15% <mark>23%</mark>	63%	
2022	13% 27%	59%	
2021	12% 20%	67%	
2019	<mark>9%</mark> 36%	56%	

	Fo	od & Groceries	
2024	3 <mark>%</mark>	61%	36%
2023	3 <mark>%</mark>	59%	38%
2022	7%	60%	33%

Ċ	Jewellery	
2024	15% <mark>11%</mark>	74%
2023	14% <mark>12%</mark>	74%
2022	13% 17%	69%

iei	Bea	auty	
2024	10%	26%	63%
2023	5% <mark></mark>	35%	60%
2022	10%	39%	50%
2021	10%	32%	58%
2019	8%	47%	45%

	То	ys					
2024	9%	9%	81%	, 5			
2023	10%	9%	81%	6			
2022	9%	159	% 7	76%			
2021	169	%	17%		67%		
2019	10%	21	%	Ć	69%		



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

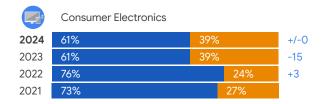
Offline Preference - respondents who said that they <u>never buy</u> <u>online</u> in this category - always in stores.

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: 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=2104/2108/2207/1467/1575, CE n=203/183/226/189/272, Home n=258/232/292/269/277, Fashion n=435/432/460/457/466, Food n=547/611/514/0/0, Beauty n=353/377/392/407/423, Toys n=146/128/136/145/136, Jewellery n=162/145/187/0/0, Q18. How frequently do you buy this category online, if at all?

Change of buying behaviour since 2020 covid pandemic

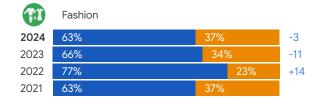


	Food & Groc	eries			
2024	30%	70%			-14
2023	44%		56%		-22
2022	66%			34%	



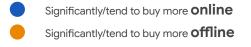
R	Home & Garden		
2024	61%	39%	-3
2023	64%	36%	+/-0
2022	64%	36%	-5
2021	69%	31%	

isi	Beauty		
2024	64%	36%	+4
2023	60%	40%	-11
2022	71%	29%	-4
2021	75%	25%	



	Toys		
2024	72%	28%	-4
2023	76%	24%	+8
2022	68%	32%	+2
2021	66%	34%	

Q	AVERAGE OF ALL VERTIC	CALS	
2024	59%	41%	-3
2023	62%	38%	



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: 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: Frequent online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1025/912/976/766, CE n=134/114/124/117, Home n=144/126/139/139, Fashion n=221/194/217/252, Food n=138/132/131/0, Beauty n=170/162/148/180, Toys n=100/84/83/78, Jewellery n=117/100/133/0, Q39: In what way, if at all, has your buying behaviour changed since the beginning of the Covid pandemic in 2020?

Тор 10 р	urchase	e trigge	ers					2024
Note: Results show <u>Top 2 boxes</u> (somewhat agree & completely agree). Top 10 ranked by Average of verticals.	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Regular refill	38% 23% 61%				40% 22% 62%	35% 24% 59%		
Needed to replace an item	27% 24% 51%	30% 37% 67%	28% 41% <mark>69%</mark>	27% 26% 53%	27% 14% 42%	37% 25% 62%	13%1% 24%	16% 17% 34%
Needed something for the current season	31% 16% 48%		24%1 <mark>1%</mark> 35%	41% 24% 65%		27%10% 37%	·····	29% 16% 45%
Wanted a personal reward	29% 15% 45%	33% 18% 52%	27% <mark>15%</mark> 42%	35% 14% 49%	27% 9% 36%	28% 18% 46%	22% 17% 39%	33% 31% 64%
I wanted to stockpile	26% 13% 39%	18%8% 26%	14% <mark>2% 26%</mark>	18% 9% 26%	41% 16% 57%	33% 17% 50%	18%1 <mark>2%</mark> 29%	25% 13% 38%
Promotion	23% 15% 39%	25% 19% 44%	24% 19% 43%	28% 18% 46%	21%8% 29%	22% 16% 38%	22% 16% 38%	21% 20% 42%
Wanted something up-to-date or new	23% 13% 37%	36% 17% 53%	27% 16% 43%	27% 15% 43%	1477% 21%	20%9% 28%	25% <mark>15%</mark> 40%	29% 27% 56%
Came across it spontaneously	24%12% 36%	17% 13% 30%	22%10% 31%	27% 15% 41%	27%8% 34%	22%8% 30%	26% 19% 45%	26% 23% 48%
Needed something for a special occasion	19% 16% 35%			16%12% 28%				27% 27% 54%
l was curious and wanted to test the product	20%11% 31%	26% 13% 39%	19%11% 30%	17%10% 27%	19%6% 25%	21% 12% 33%	20% 14% 34%	25% 20% 45%

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=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

Top 10 online purchase drivers

	Somewhat agree	Completely agree	Тор 2 Вох	
Product delivery to my home	31%	33%	63%	
Easier to find a specific product	36%	27%	62%	
Easier to make a choice	39%	23%	62%	
Easier to find new products	36%	25%	61%	
All relevant information conveniently accessible	42%	18%	60%	
It's faster than offline	30%	27%	58%	
Always latest product information available	37%	18%	54%	
It's more convenient than offline	30%	24%	54%	
It was cheaper online (promotion or lower prices)	28%	25%	53%	
It best fits my lifestyle	31%	20%	51%	

Top 10 offline purchase drivers

	Somewhat a	gree Completely ag	ree Top 2 Box
I can take the product home with me directly	26%	58%	84%
l can see, feel, or try the product more easily	31%	45%	76%
Easier to make a choice	37%	33%	70%
It's faster than online	31%	36%	67%
It best fits my lifestyle	34%	30%	64%
Easier to find a specific product	34%	28%	62%
Can get advice from staff	31%	28%	59%
All relevant information conveniently accessible	34%	25%	59%
It's more fun than online	26%	31%	58%
Easier to find new products	30%	23%	52%
cause of rounding up numbers.			

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

Consulately and Top 2 De

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=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?

Google Market Insights BE

2024

Reasons for retailer selection: avg. across verticals

Top 2 Box

83%

82%

79%

Note: Results show Top 2 boxes (guite important & very important) ranked by average of all verticals in 2024 Quite Very important important They had the product I wanted in stock 40% They offer a good range of products 34% 48% I trust this retailer 44% 35%

They offer a good in-store shopping experience	49%	28%	78%
Their products are competitively priced	43%	34%	77%
Good customer service	44%	32%	77%
Positive past experience with this retailer	44%	32%	76%
They offer high quality products	45%	29%	74%
They are local to me (the store is located near me)	41%	33%	74%
They provide products for everyone	44%	28%	72%
They offer free returns	35%	35%	70%
They offer products for people like me	44%	25%	70%

They have a clear return policy

	Quite important	Very important	Top 2 Box
They offer a good online shopping experience	41%	28%	68%
They offer free delivery	35%	32%	67%
When I bought the product, the retailer was offering a good deal/promotion	39%	28%	67%
I can return a product to this retailer at a location nearby	38%	24%	62%
They offer the fastest delivery	37%	22%	60%
They provide good personalised recommendations about products I might like	40%	18%	58%
I already have an account in this retailer's website with all my data and preferences saved	34%	19%	52%
They offer a great connection between online and in-store services	32%	16%	48%
They offer a range of different payment options	31%	17%	48%
Retailer's ethical practices	32%	14%	46%
Retailer's commitment to environmental change	31%	14%	44%
Their adverts include a range of people who look like me	23% 11	%	34%

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

29%

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69%

Google Market Insights BE

2024 Average of all Verticals

Relationship with the retailer for the last purchase

	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
l purchase all products in this category from here, if possible	41%	39%	29%	34%	56%	43%	36%	32%
	40%	31%	33%	26%	52%	53%	32%	24%
It is one of a few retailers I buy	39%	<mark>39%</mark>	47%	40%	35%	39%	41%	40%
from	42%	39%	40%	45%	44%	33%	48%	41%
l use it only when I don't have	7%	10%	8%	8%	5%	8%	9%	8%
an alternative	6%	11%	6%	9%	2%	5%	9%	9%
It was the first time I bought	7%	9%	10%	10%	<mark>0%</mark>	4%	7%	15%
from this retailer	8%	12%	16%	11%	0%	4%	7%	19%
Aggregation: Use one or only	81%	77%	76%	75%	91%	82%	77%	73%
few retailers	81%	70%	73%	71%	96%	86%	80%	65%

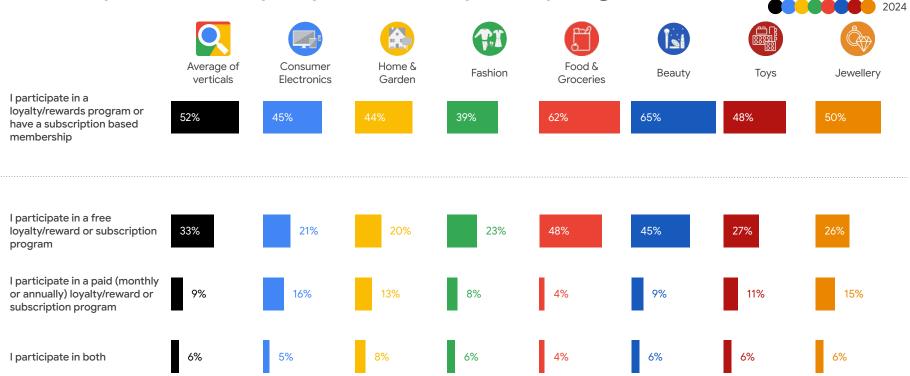
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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

Google Market Insights BE

2024

2023

Participation in loyalty & subscription programs



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



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

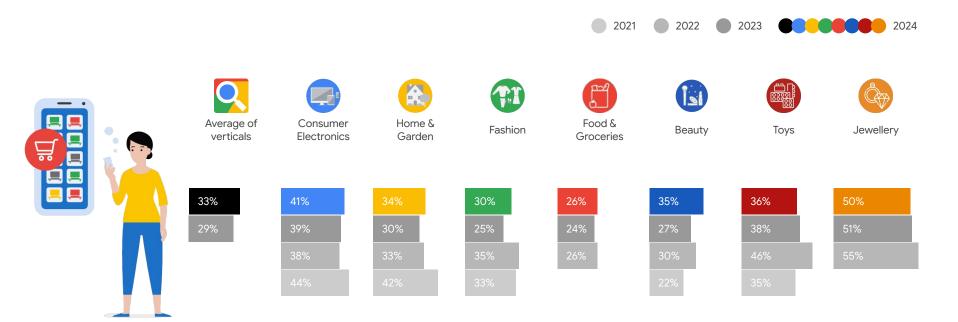
conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty.

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

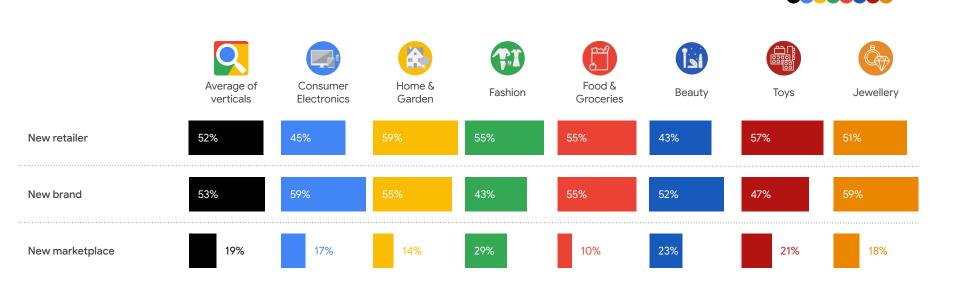


Note: Purchases made in the last 4 weeks from a retailer, a platform or brand never shopped with before

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 2024/2023/2021: 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

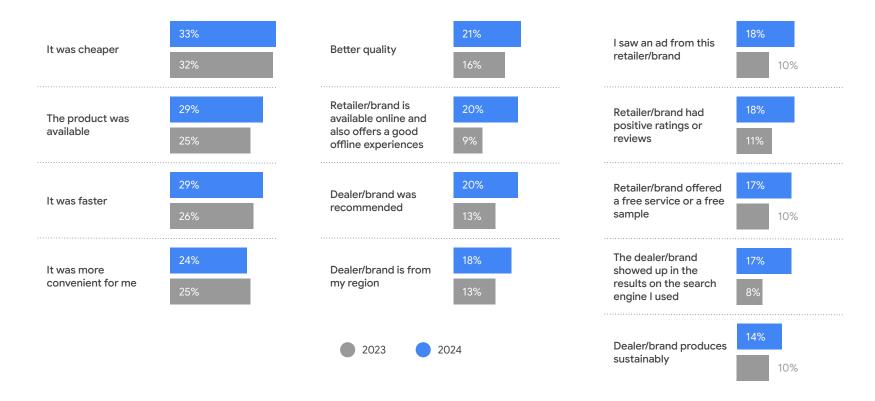


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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, G33 1 Thinking about that new purchase, where did you buy the product from for the first time?

Google Market Insights BE

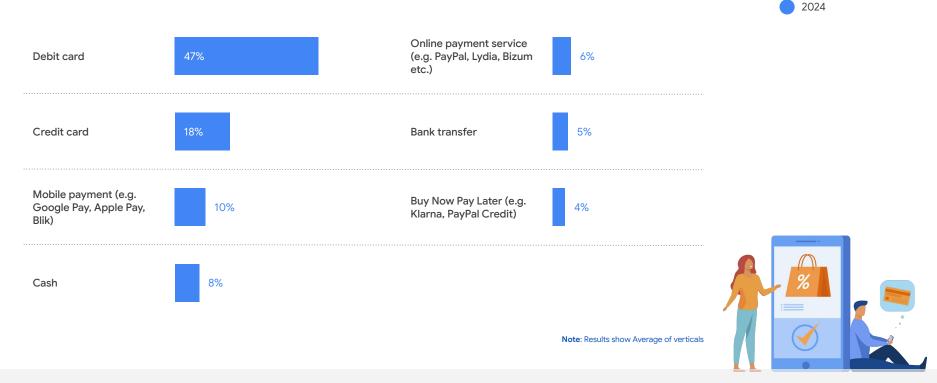
2024

Reasons for purchasing from a new store



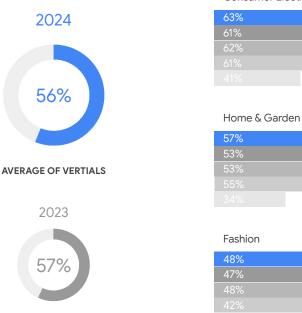
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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



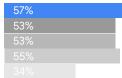
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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

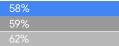


Consumer Electronics

63%		
61%		
62%		



Food & Groceries



2019

2021



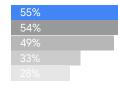
2022

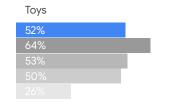


2023

2024

Beauty







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: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1018/940/874/494/453, CE n=123/112/114/81/105, Home n=132/121/124/95/73, Fashion n=257/229/235/171/160, Food n=162/149/102/0/0, Beauty n=155/148/124/94/70, Toys n=85/76/66/53/45, Jewellery n=103/104/109/0/0, 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	13%	12%	17%	9%	20%	13%	14%	12%
	14%	15%	15%	5%	19%	19%	10%	24%
Independent product reviews were hard to find	13%	13%	15%	<mark>8%</mark>	13%	16%	14%	15%
	10%	16%	9%	5%	11%	9%	14%	19%
l couldn't buy without registering or without logging in	13% 12%	15% 11%	14% 10%	11% 16%	13% 5%	15% 12%	10% 21%	11% 15%
l couldn't find the product for	13%	14%	15%	10%	11%	6%	16%	25%
my needs quickly	15%	22%	12%	11%	18%	11%	15%	19%
Return of product wasn't free or it was too expensive	12%	10%	10%	13%	10%	16%	13%	10%
	13%	9%	7%	14%	14%	14%	11%	18%
The product I wanted wasn't available	12%	6%	15%	<mark>12%</mark>	<mark>14%</mark>	12%	<mark>13%</mark>	10%
	12%	8%	10%	12%	14%	10%	12%	15%
Return policy wasn't clear	12%	18%	11%	<mark>9%</mark>	15%	7%	14%	12%
enough	9%	10%	8%	4%	8%	9%	13%	17%
They didn't offer an option to return a product at a location nearby	11% 8%	10% 7%	13% 8%	10% 5%	15% 6%	5% 10%	12% 10%	<mark>15%</mark> 17%

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?

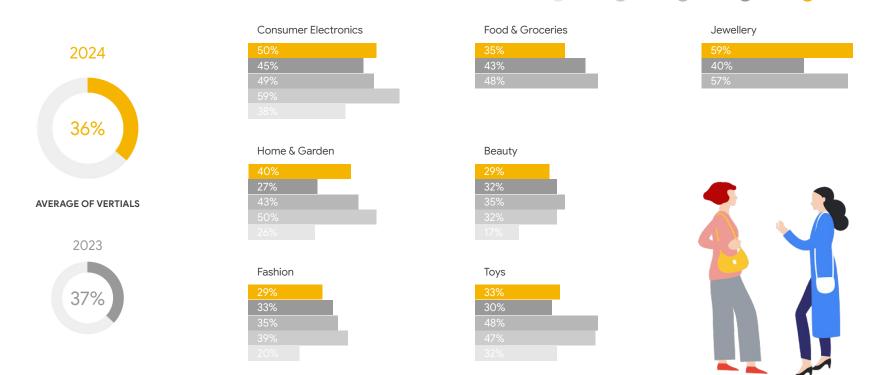
Other online pain points								
Note: Other online pain points, results ranked by Average of verticals.	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
My preferred payment method was not available	11%	12%	14%	7%	10%	12%	10%	12%
	8%	6%	9%	6%	6%	8%	10%	15%
Response time of customer support was too slow	10%	10%	12%	8%	15%	5%	<mark>12%</mark>	15%
	10%	11%	12%	6%	8%	12%	12%	13%
Pricing wasn't clear enough	<mark>9%</mark>	12%	9%	3%	14%	<mark>9%</mark>	16%	<mark>9%</mark>
	7%	8%	6%	6%	5%	7%	8%	8%
Delivery fees or options	<mark>9%</mark>	13%	8%	6%	14%	<mark>8%</mark>	<mark>9%</mark>	10%
weren't clear enough	8%	9%	10%	5%	6%	10%	14%	9%
l couldn't find sufficient	9%	11%	10%	6%	8%	11%	<mark>9%</mark>	11%
information on the product	7%	9%	6%	5%	2%	5%	12%	19%
I needed support and couldn't contact anyone	<mark>9%</mark>	12%	13%	7%	11%	2%	10%	11%
	8%	11%	7%	5%	4%	12%	7%	14%
l didn't have time to do	<mark>8%</mark>	8%	7%	10%	6%	<mark>8%</mark>	<mark>9%</mark>	10%
sufficient product research	8%	7%	12%	5%	9%	8%	10%	12%
The purchase process was interrupted due to a technical issue	<mark>8%</mark> 8%	8% 7%	7% 13%	7%	8% 2%	12%	<mark>8%</mark> 14%	<mark>8%</mark> 14%

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 nain nainte

Offline buyers: respondents experiencing pain points



2019

2021

2022

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

Google Market Insights BE

2024

2023

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								2024
Note: Top 8 offline pain points, results ranked by Average of verticals.	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The product has become more expensive recently	<mark>13%</mark>	14%	<mark>9%</mark>	4%	<mark>18%</mark>	<mark>15%</mark>	10%	<mark>19%</mark>
	19%	10%	7%	11%	30%	17%	4%	9%
l couldn't find the product for	11%	15%	12%	15%	6%	<mark>9%</mark>	12%	26%
my needs quickly	7%	13%	9%	7%	6%	6%	8%	11%
Check out took too long / lines at check out	10%	15%	13%	7%	<mark>9%</mark>	7%	11%	17%
	7%	6%	6%	7%	8%	5%	4%	7%
I wanted to look online for information while in store but didn't have access	8% 3%	<mark>9%</mark> 8%	15% 4%	6% 4%	5% 2%	6% 1%	13% 3%	<mark>27%</mark> 9%
The product I wanted wasn't available	8%	11%	11%	5%	7%	6%	7%	23%
	7%	7%	5%	3%	11%	4%	4%	7%
There were no delivery options	8%	13%	13%	7%	5%	4%	7%	23%
	4%	3%	7%	4%	2%	3%	5%	10%
No service, no consultancy in the store	7%	<mark>9%</mark>	12%	6%	3%	<mark>9%</mark>	8%	21%
	3%	9%	4%	3%	2%	2%	5%	7%
The delivery period was longer than usual	7%	13%	7%	<mark>9%</mark>	2%	5%	13%	21%
	3%	13%	6%	3%	1%	4%	2%	3%

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.	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
The shop was closed and didn't offer an online shop	6%	7%	6%	6%	4%	6%	10%	16%
	1%	4%	0%	1%	0%	1%	2%	6%
l didn't have time to do	6%	<mark>9%</mark>	<mark>13%</mark>	5%	2%	4%	7%	<mark>19%</mark>
sufficient product research	3%	8%	3%	7%	0%	4%	5%	5%
l couldn't find sufficient	6%	5%	<mark>9%</mark>	7%	2%	5%	8%	21%
information on the product	2%	3%	2%	1%	1%	2%	1%	7%
Pricing wasn't clear enough	5%	7%	7%	6%	3%	4%	10%	<mark>16%</mark>
	3%	2%	2%	1%	3%	3%	3%	3%
l needed support and couldn't find staff	5%	<mark>8%</mark>	<mark>8%</mark>	5%	3%	4%	6%	18%
	2%	6%	4%	2%	0%	1%	3%	10%
Staff were unfriendly	5%	10%	8%	7%	1%	4%	6%	<mark>12%</mark>
	2%	4%	1%	1%	2%	2%	1%	1%

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?

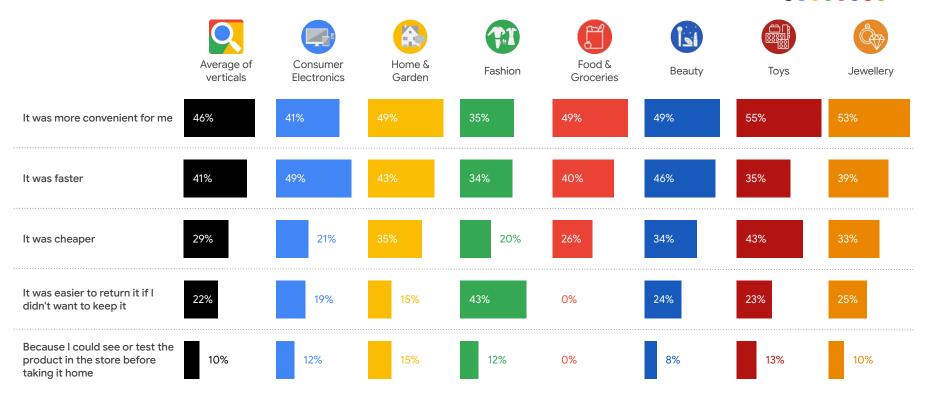
Ways of obtaining the product 2024 A. 1. Average of Home & Consumer Food & Fashion Jewellery Beauty Toys verticals Electronics Garden Groceries I bought in store and took it 47% 34% 68% 53% 38% home myself I bought in store and had it 3% 4% 1% 2% 1% 3% 4% delivered to my home I bought in store and had it delivered to a pick-up location 0% 0% 0% 0% 1% 0% 1% near me I bought it online or via phone 7% and it was delivered to my 24% 37% 21% 31% home I bought it online or via phone and it was delivered to a 8% 10% 10% 6% 9% 11% 13% pick-up location near me I bought it online or via phone 5% 4% 3% 6% 6% 6% 9% and picked it up in a store I ordered it online but paid in a 3% 2% 3% 2% 3% 4% 8% store during the pick-up

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.

Google Market Insights BE 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

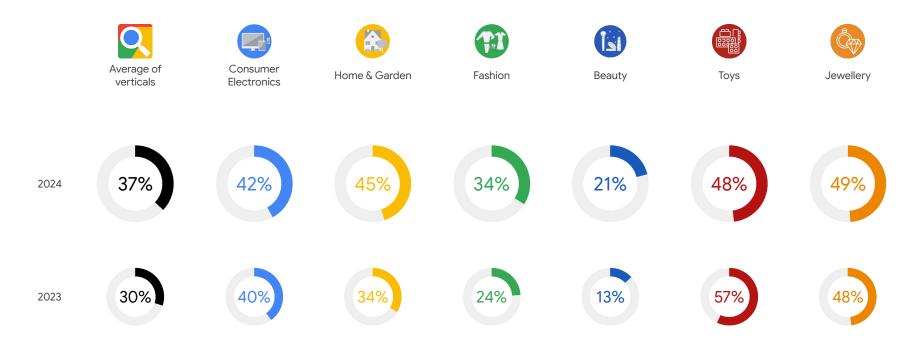


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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

Google Market Insights BE

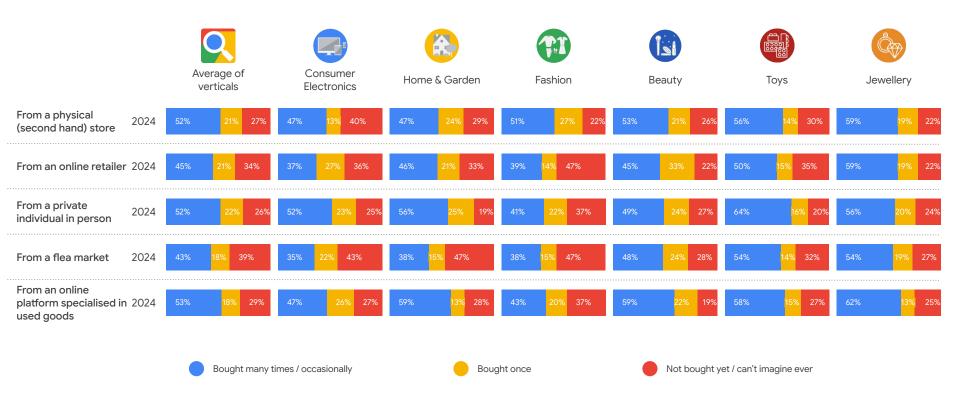
2024

Share of respondents purchasing used goods in the past

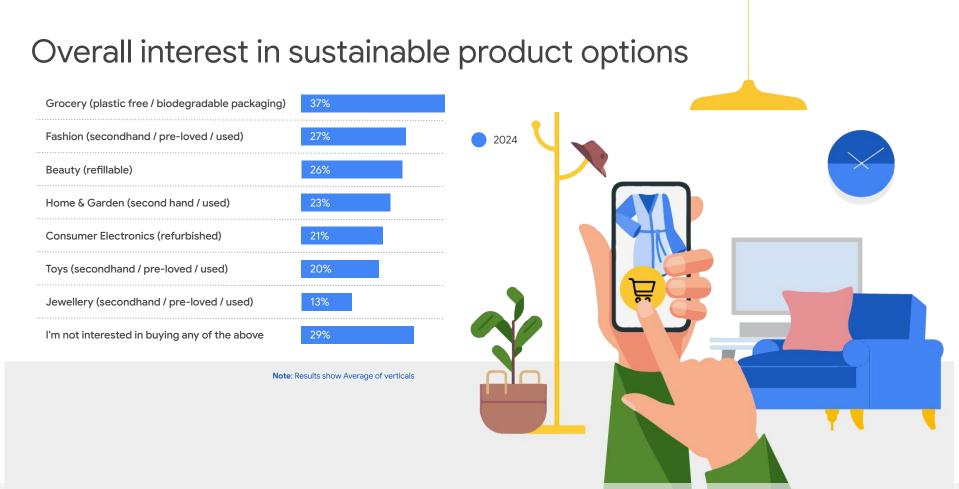


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty. Base 2024/2023: All product buyers of CE, Home, Fashion, Beauty, Toys, Jewellery n=1557/1497, CE n=203/183, Home n=258/232, Fashion n=435/432, Beauty n=353/377, Toys n=146/128, Jewellery n=162/145, Q100. Please think of all the products you have ever bought in this category. Have you ever bought used goods?

Location and frequency of purchasing used goods



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



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, Q101_A. Now, please don't refer to the product you bought last time but think in general: Which categories are you the most interested in buying more sustainable products?

Impact of cost of living

2023

2024 Average of all Verticals

I am using more deals/discounts/offers when shopping because of rising	35%		
inflation	36%		
I'm making budgeting and financial savings a priority because of rising	36%		
inflation	39%		
I am buying cheaper products/brands because of rising inflation	33%		
· · · · · · · · · · · · · · · · · · ·	35%		
l am delaying big purchases because of rising inflation			
· · · · · · · · · · · · · · · · · · ·	34%		
I am buying less products overall because of rising inflation	25%		
· · · · · · · · · · · · · · · · · · ·	30%		
I haven't changed my spending habits because of rising inflation	19%	13	
	18%	8%	
I am buying used goods rather than new products because of rising		10	
inflation	18%	8%	

Somewhat	agree	Completely aç	gree	Top 2 Box
35%		24%		58%
36%		25%		61%
36%		19%		54%
39%		19%		58%
33%		21%		54%
35%		21%		56%
33%		19%		51%
34%		19%		53%
25%	15	%		39%
30%		14%		44%
19%	13%			32%
18%	8%			26%
18%	10%			28%
18%	8%			26%

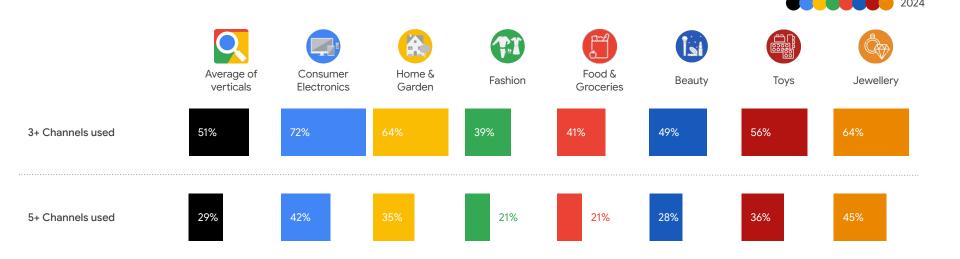
Note: Results show Top 2 boxes (somewhat agree & completely agree) ranked by average of all verticals in 2024. In some cases, the percentages of somewhat agree & completely agree might not match the Top 2 Box score because of rounding up numbers.

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

Chapter 2 Product **Discovery** & Research

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

Channel usage during the shopping journey

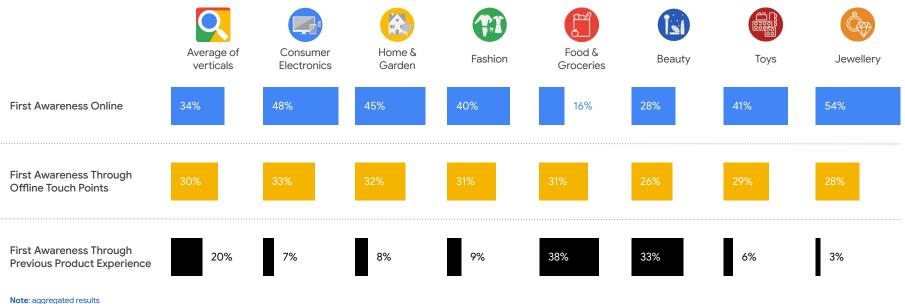


Note: These percentages indicate the proportion of respondents who used at least 3 channels or at least 5 channels out of 9 channels from a list

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=203, Home n=258, Fashion n=435, Food n=547, Beauty n=353, Toys n=146, Jewellery n=162, Q9Bis. How many times Google Market Insights BE 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.

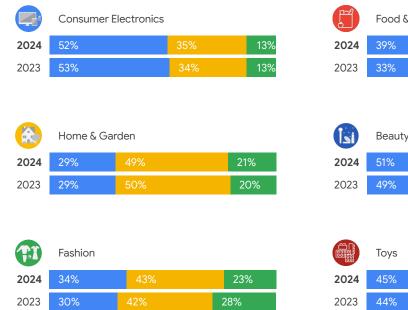
First Awareness Offline - respondents who claim that they first got aware of the product by a sales assistant recommendation or in a brochure/ catalog or newspaper/ magazine or saw the product in the store/ mall or on the radio or TV or recommendation from a friend or outdoor ad.

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

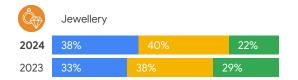


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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



	Food & Groce	ries	
2024	39%	43%	18%
2023	33%	47%	20%
	Beauty		
2024	51%	34%	15%
2023	49%	40%	12%
	Toys		
2024	45%	36%	19%
2023	44%	34%	22%



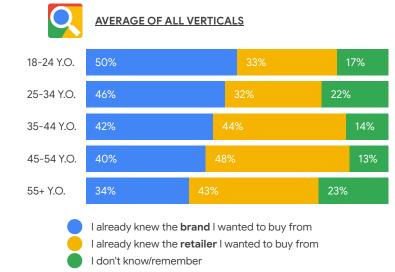
Q	AVERAGE OF ALL VERTICALS		
2024	40%	41%	19%
2023	37%	42%	20%

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: 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, 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

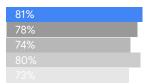
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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

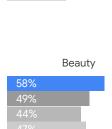


Consumer Electronics
90%
84%
85%
86%

Home & Garden







2019

Food & Groceries

2021

2022

2023

Jewellery

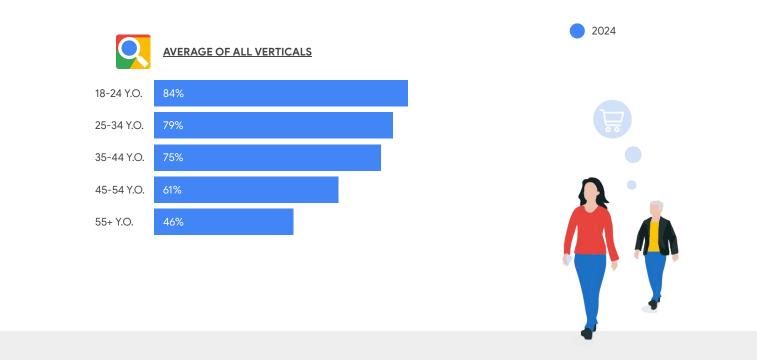
2024





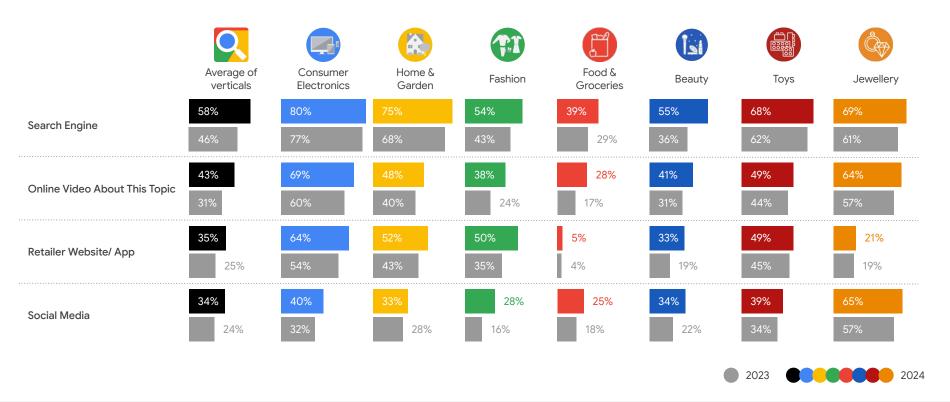
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery 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=2104/2108/2207/1559/1575, 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) recarding the product you bought; if at all?

Online research prior to purchase



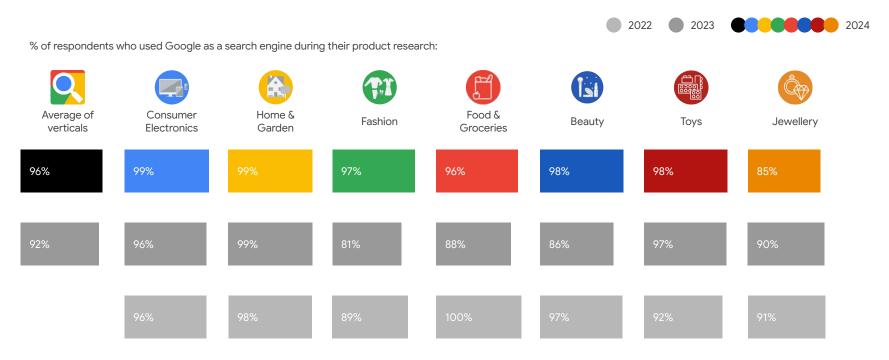
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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

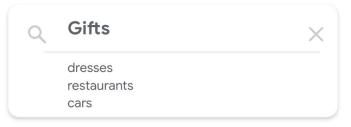


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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

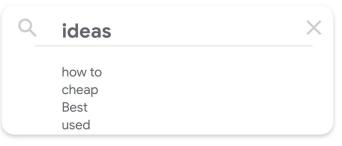
A search phrase is usually made up of two parts. One is the **topic** and the other the **context-setter**, describing what people want to know about a topic. We call these descriptive words "modifiers". They help people navigate information more easily.

Topic What the user is interested in _{Examples:}

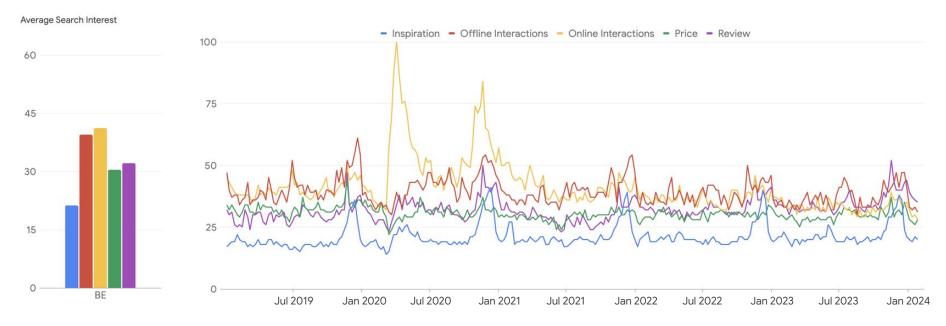


Modifiers

What users want to know about a topic Examples:



Search interest of popular modifiers in the shopping category



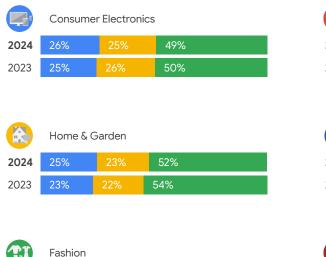
Source: Google Trends (Jan 2019 - Jan 2024) - translated modifiers (into local languages) have been used for each market. Shown in English here for simplicity reasons:

Retailtainment

2024

2023

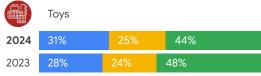
34%

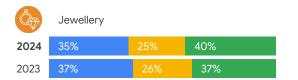


47%

49%

	Food & Groceries			
2024	31%	18%	51%	
2023	32%	19%	49%	
ادا	Beauty			
2024	31%	19%	50%	
2023	34%	20%	46%	





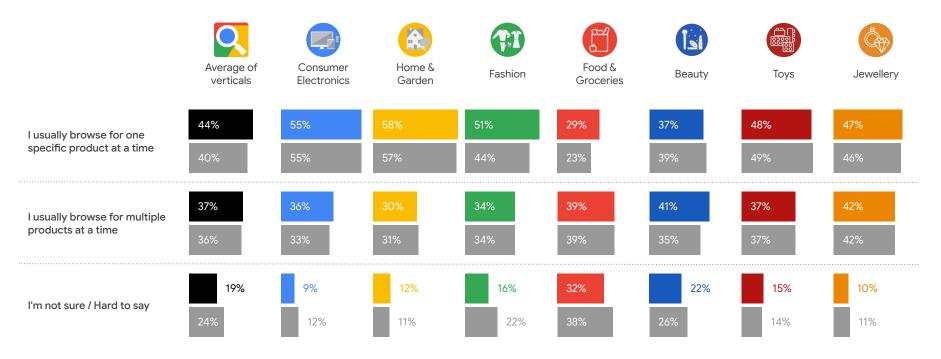
Q	AVERAGE OF ALL VERTICALS		
2024	31%	21%	49%
2023	31%	21%	48%

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

Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: 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 D. Thinking about when you're atherina inspiration about [INSERT CATEGORY] products to buy, in general, what proportion of your time do you spend doing the following?

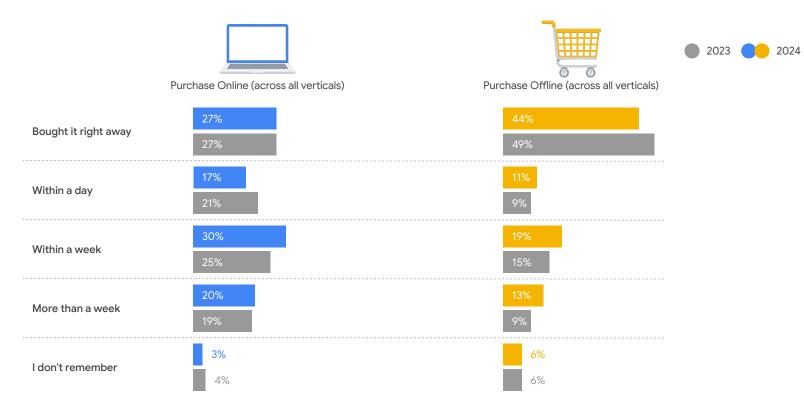
Product browsing behavior



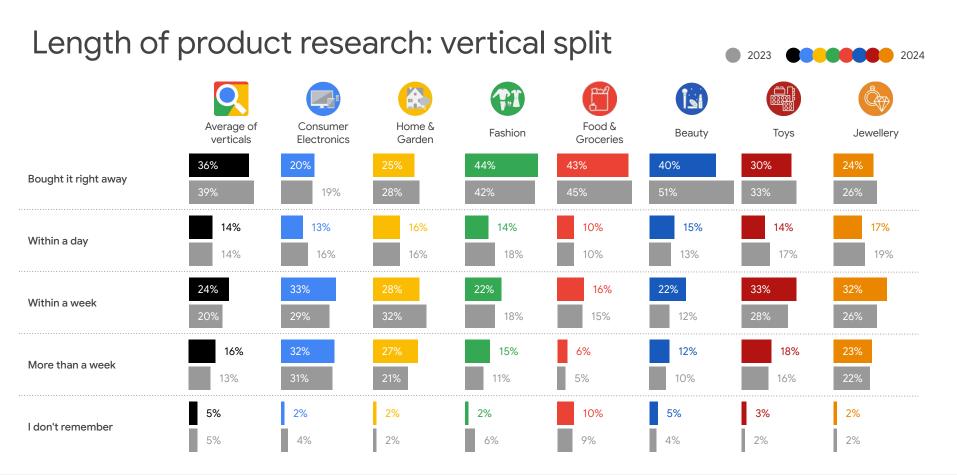


Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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



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

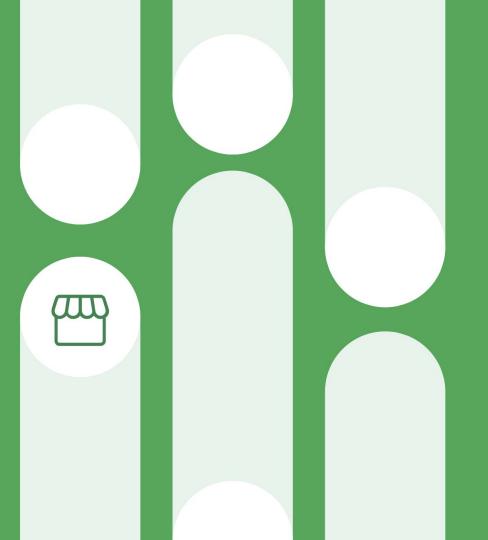
Aggregation: % of consumers who used at least one tool/technology below when looking for inspiration about what to buy in the last 6 months 20% Short form videos (e.g. YouTube Shorts, Instagram reels, Facebook stories, LinkedIn stories. TikToks etc.) 15% Social commerce (products ordered via social networks, such as Youtube, Instagram, Facebook, Linkedin, TikTok etc.) Visual search (i.e. take a photo or use an image of an item within a search engine to get 14% more information about it. for example Google Lens) 10% Chatbot on a brand or a retailer website/app (e.g. talking to a virtual interface to find the 10% product of your needs) 8% Chat based AI tools (e.g. Chat GPT, Bard) 6% VR (Virtual reality) (e.g. using a VR headset to immerse yourself in an environment) 5% 5% AR (Augmented reality) (e.g. trying a piece of clothing or an accessory on virtually) 5% 60% I have not used any of these technologies

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? 2023 🔵 2024

Google Market Insights

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]

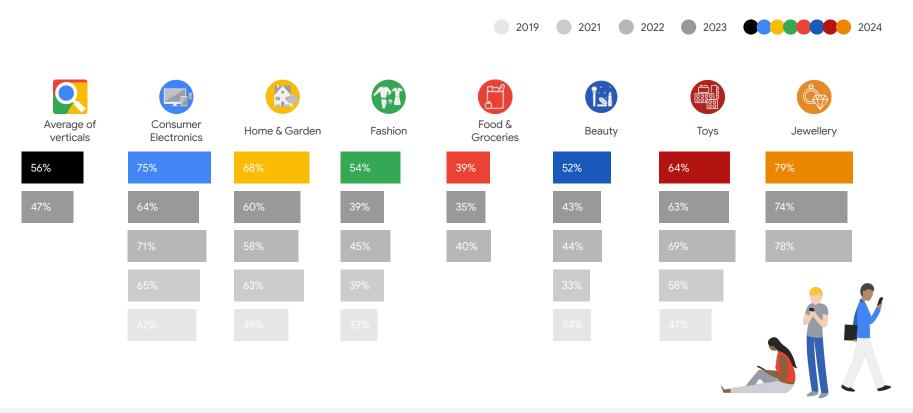


Devices used for online purchase



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?

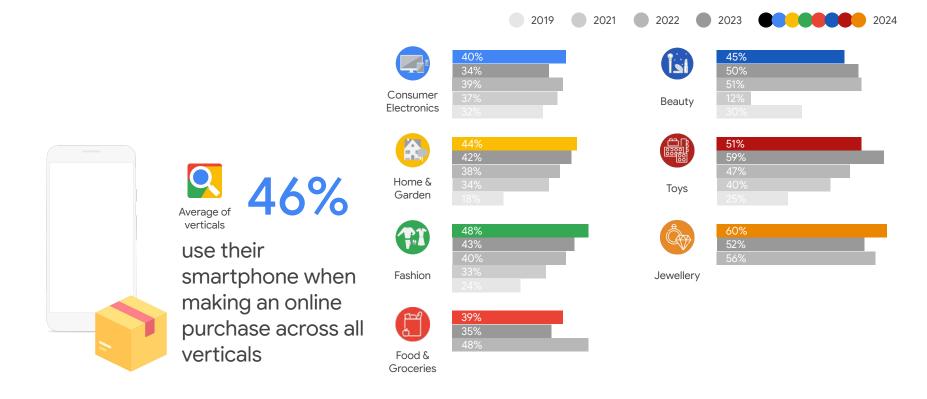
Smartphone usage during product research



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



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: Online buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=1017/940/874/500453, CE n=123/112/114/82/105, Home n=132/121/124/95/73, Fashion n=257/229/235/175/160, Food n=162/149/102/0/0, Beauty n=155/148/124/94/70, Toys n=85/76/66/53/45, Jewellery n=103/104/109/0/0, Q3: Which device did use you for your online purchase?

Purchases via smartphones: websites vs. apps

	Consumer Electronics		
2024	46%	54%	
2023	55%	45%	
2022	62%	38%	
2021	60%	40%	
2019	63%	37%	

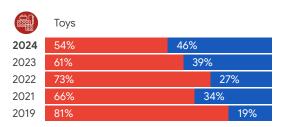
Ĩ	Food & Groceries		
2024	45%	55%	
2023	69%		31%
2022	53%	47%	

Ċ	Jewellery	
2024	41%	59%
2023	46%	54%
2022	55%	45%

R	Home & Garden		
2024	59%	41%	6
2023	49%	51%	
2022	57%	43%	,
2021	71%		29%
2019	68%		32%

ŢI	Fashion	
2024	40%	60%
2023	58%	42%
2022	53%	47%
2021	42%	58%
2019	41%	59%

	Beauty	
2024	54%	46%
2023	47%	53%
2022	76%	24%
2021	55%	45%
2019	68%	32%



Q	AVERAGE OF ALL V	ERTICALS
2024	47%	53%
2023	55%	45%



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

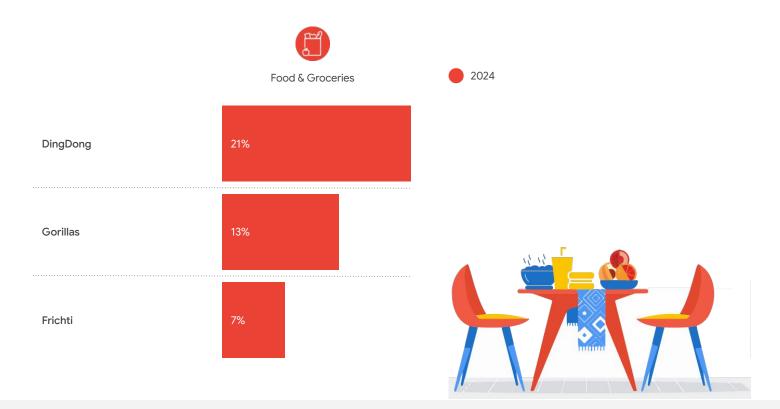
Source: Smart Shopper Research. Google, Cint (2023 & 2024) / Savanta (2022) / Zweipunkt (2021) / Kantar (2020 & 2019), Online survey, Country: Belgium. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery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

Base 2024/2023/2022/2021/2019: Online buyers purchasing via smartphone, buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=447/388/368/143/12, CE n=45/36/41/28/29, Home n=55/44/45/30/13, Fashion n=118/91/89/54/39, Food n=58/48/48/0/0, Beauty n=70/72/58/11/19, Toys n=41/44/31/19/11, Jewellery n=59/52/57/0/0, Q3_E: And how did you buy via your smartphone?

Shopping a	ons		2019 2021 2022 2023 2024 2024					
	Average of verticals	Consumer Electronics	Home & Garden	Fashion	Food & Groceries	Beauty	Toys	Jewellery
Retailer app (featuring various brands and products)	37% 31%	38% 33% 33% 35% 23%	36% 33% 28% 35% 20%	40% 25% 27% 26% 20%	33% 30% 35%	37% 31% 27% 25% 19%	41% 35% 31% 31% 26%	46% 42% 33%
Coupons and promotions app	22% 17%	23% 21% 16% 27% 22%	25% 21% 21% 25% 18%	17% 12% 13% 17% 12%	24% 17% 20%	21% 14% 17% 19%	26% 23% 22% 27% 23%	26% 27% 20%
Brand app (featuring only products and content from this brand)	21% 13%	31% 22% 21% 24% 14%	24% 18% 18% 20%	24% 13% 18% 14% 9%	10% 4% 9%	20% 9% 14% 10% 7%	23% 18% 21% 15% 12%	34% 32% 26%
Delivery app	20% 15%	28% 22% 24%	24% 21% 11%	22% 14% 14%	9% 11% 12%	15% 12% 13%	27% 17% 23%	<mark>36%</mark> 27% 28%

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



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 respondents that have delivery apps installed, buyers of Food n=50, Food n=50, Q20_B: Did you use any of the following delivery apps? Google Market Insights



Smart Shopper 2024