The age of Influence

Understanding what drives purchase decisions today and tomorrow



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Three trends reshaping how Swedes get inspired, influenced, and make purchase decisions

1. The polarized media map - How channel importance differs across generations

2. Intelligence at play - How AI is reshaping the purchasing process

3. Salience under pressure – Consumers change course and switch brands during the purchase process

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The polarised media map

How channel importance differs across generations

Explore how different generations navigate today's media landscape - from traditional touchpoints to new digital arenas - and what this means for reach, attention, and brand impact.

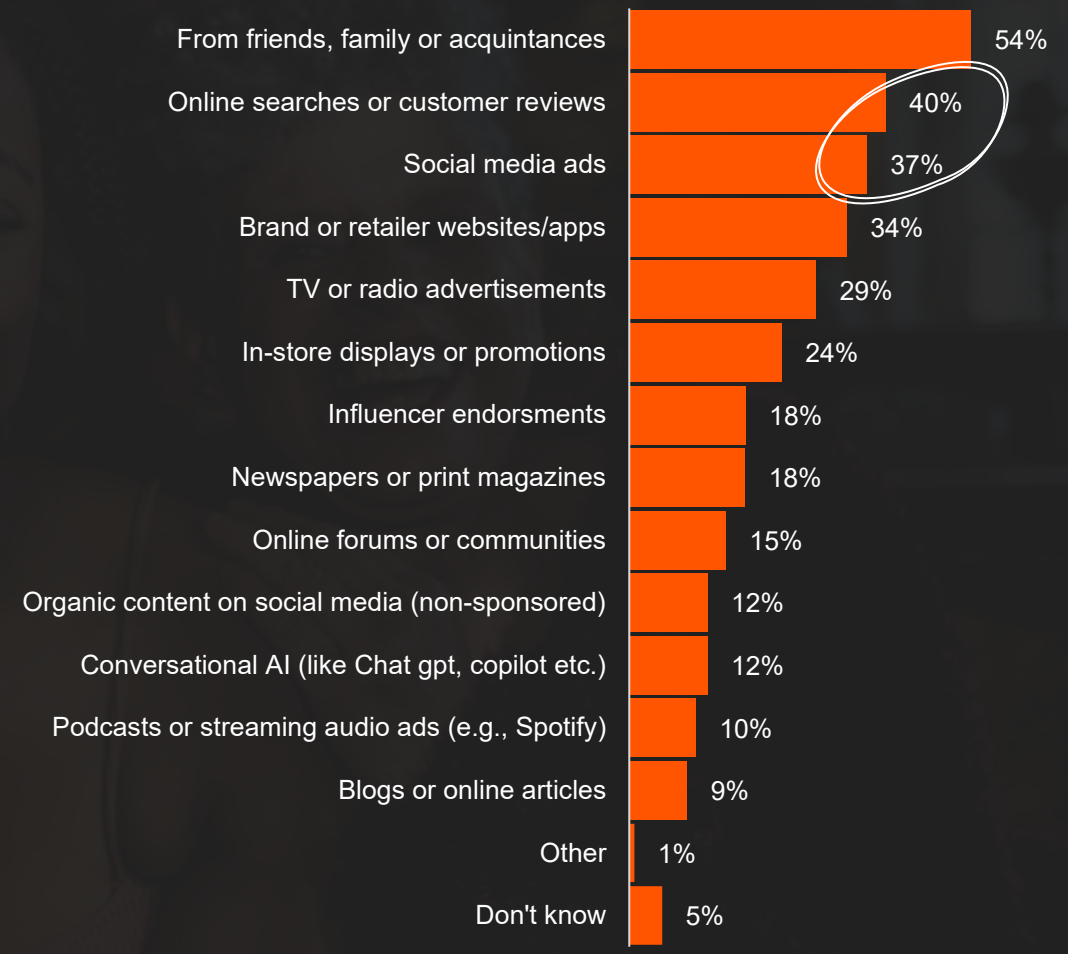
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Understanding where consumers find inspiration and information is key to shaping effective brand growth. It reveals the sources and touchpoints where curiosity turns into consideration.

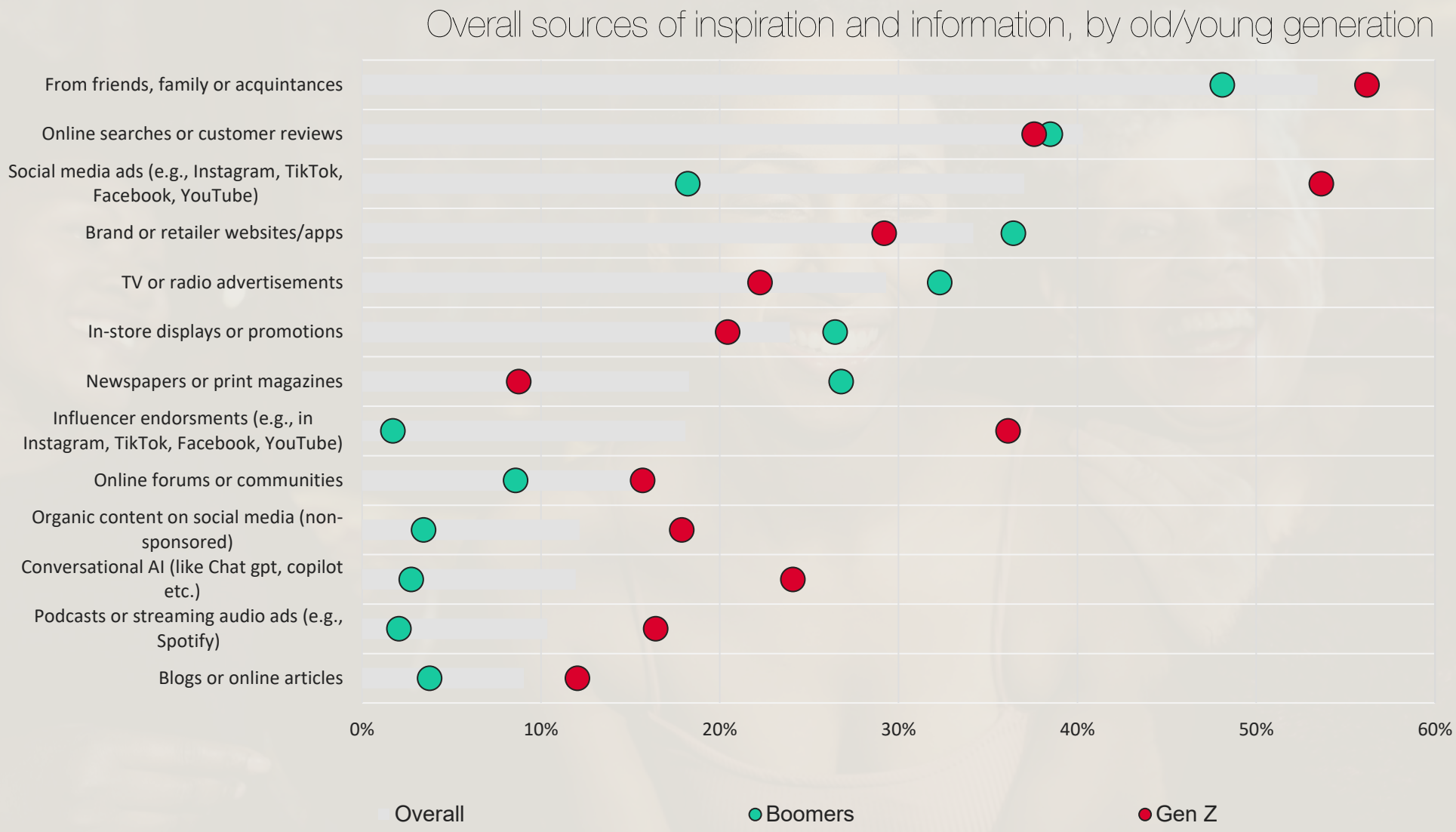
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The main source of inspiration and information among Swedes are friends & aquiantances, followed by online searches and customer reviews

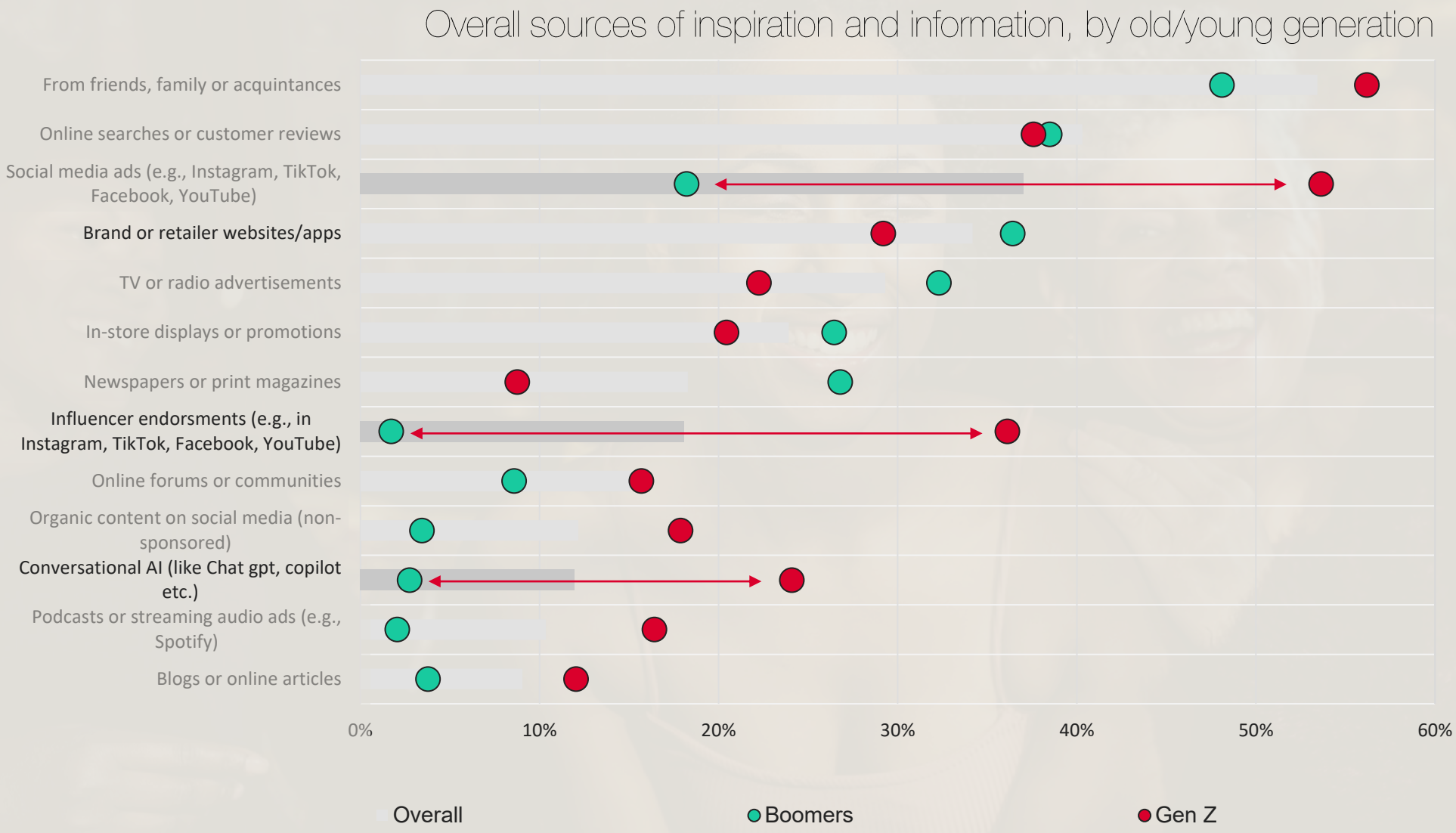
Overall sources of inspiration and information



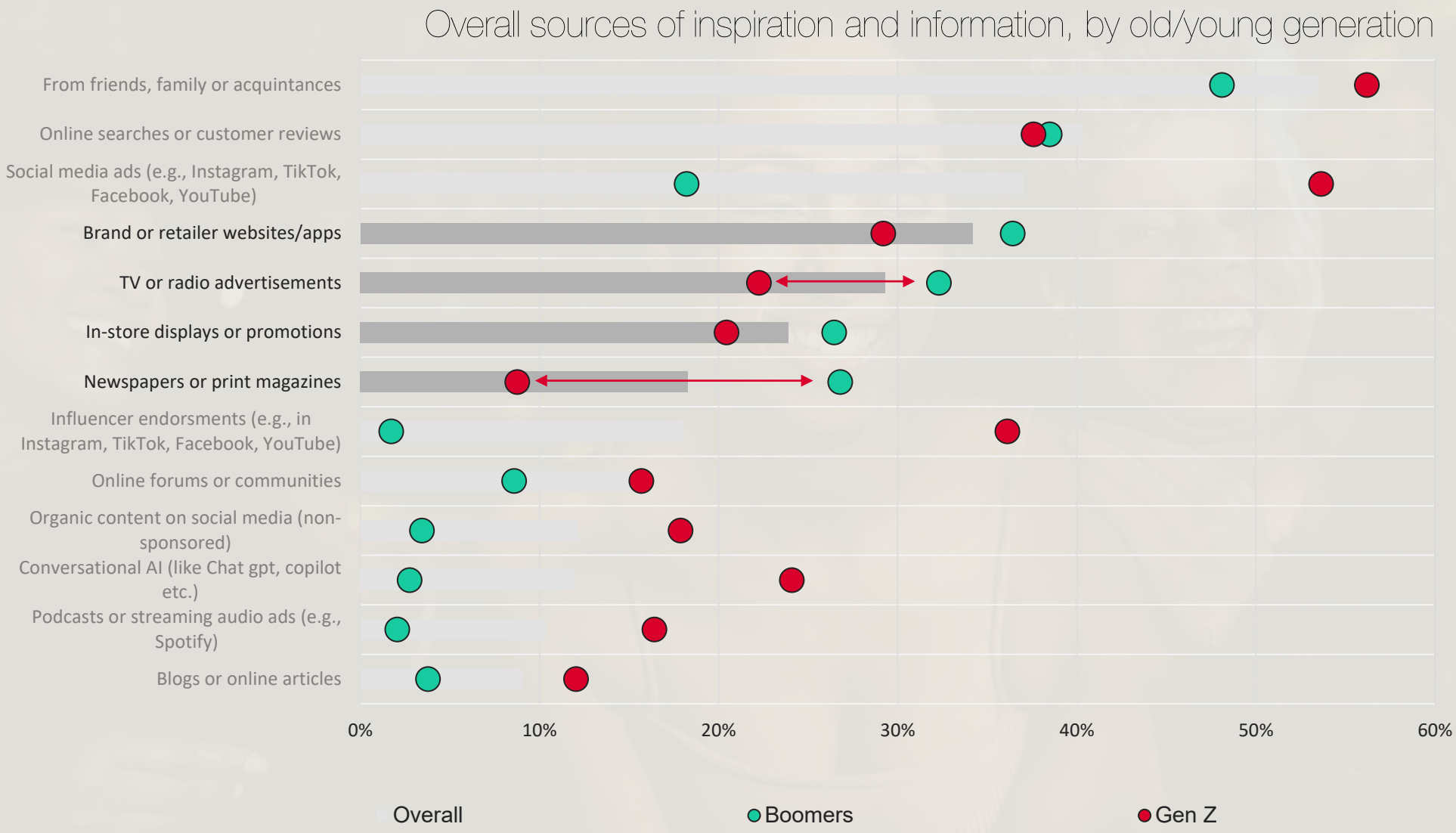
The media usage is very polarized comparing the youngest and the oldest consumers



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Inspirational search can be divided into 4 overarching themes

Social influence
72%

- Influencer endorsements
- Social media ads
- Organic content on social media
- Friends, family or acquaintances

Digital Research
65%

- Online searches or customer reviews
- Online forums or communities
- Brand or retailer websites aps
- Blogs or online articles

Conventional advertising
57%

- TV or radio ads
- Newspapers or print magazines
- In-store displays or promotions

Emerging Digital Channels
17%

- Conversational AI
- Podcasts or streaming audio ads

…and the different dimensions can be used to target different audiences

Factor Analysis is a statistical method used to identify underlying relationships between variables. It helps to reduce a large number of variables into a smaller set of factors, making it easier to understand the data.

No size fits all - The opportunity lies in understanding which mix of channels aligns with your target segments

Gen Z

Social influence dominates. This group is also most open to emerging digital channels, and least responsive to conventional advertising.

Implication: Prioritize social media, influencers, and new digital formats to reach Gen Z. Traditional ads have limited impact here.

*Top 3 channels where the generation over indexes compared to the population

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Boomers

More reliant on conventional advertising and digital research, with lower engagement in social influence other than friends & family.

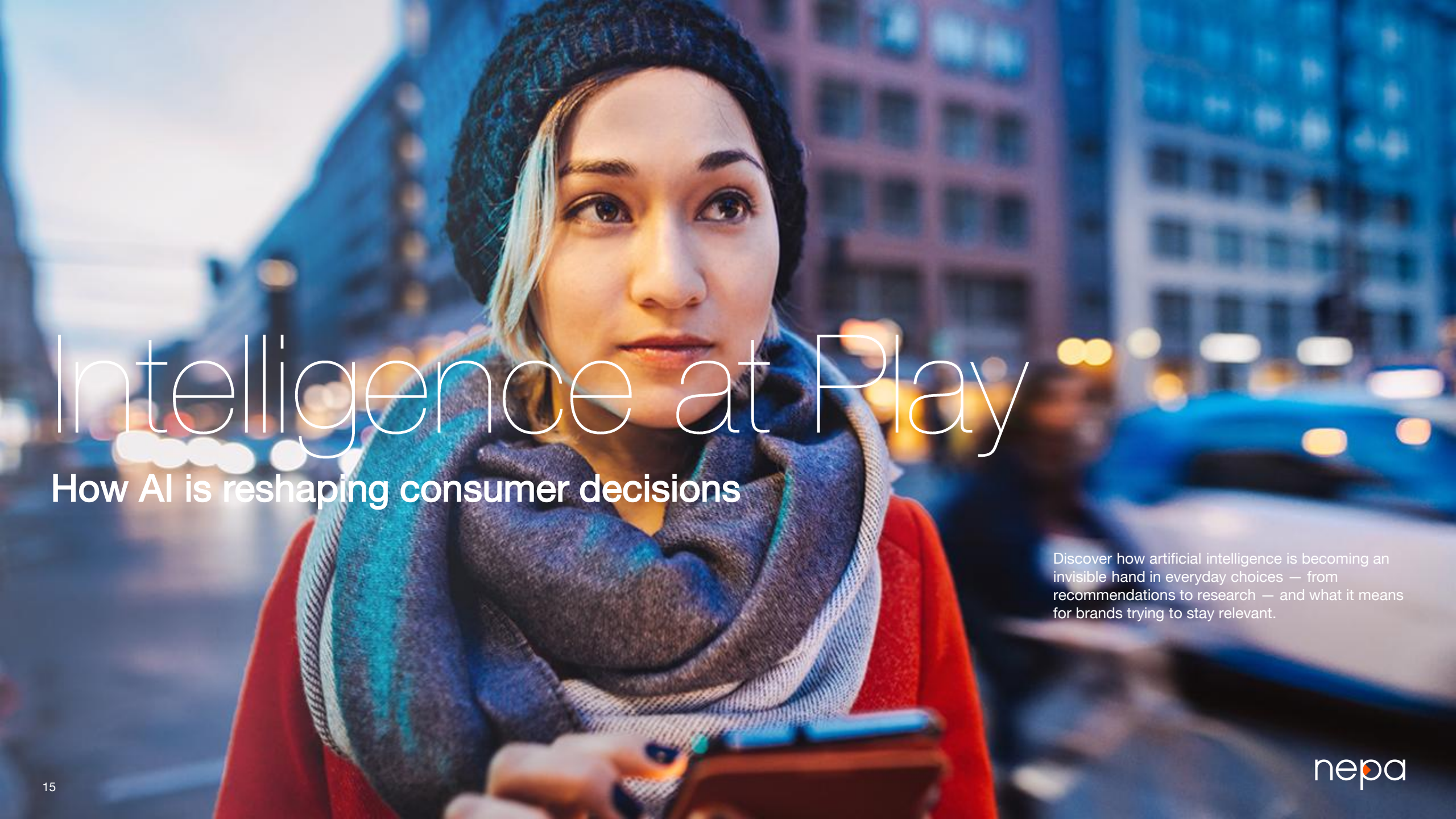
Implication: Traditional media and credible online information are key for this group. Social and emerging channels play a smaller role.

*Top 3 channels where the generation over indexes compared to the population

What implications does this have for brands or retailers?

- There no one-size-fits-all
- No matter the channel, it's trust, relevance and transparency that tip the scales
- Think smart – not just big

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Intelligence at Play

How AI is reshaping consumer decisions

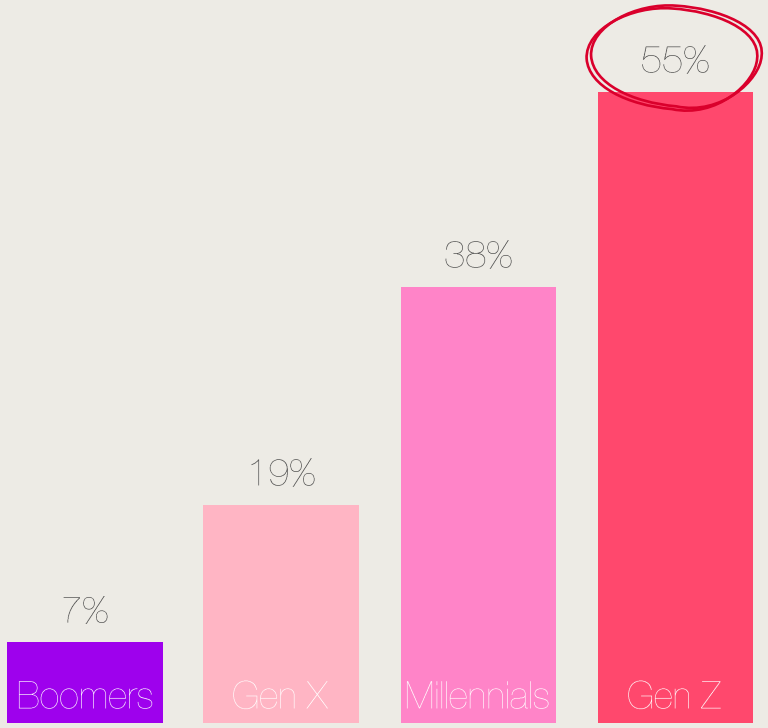
Discover how artificial intelligence is becoming an invisible hand in everyday choices — from recommendations to research — and what it means for brands trying to stay relevant.

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The consumer journey is being re-coded. AI doesn't just speed up decisions — it changes who makes them. To grow in this new logic, brands must learn to influence the algorithm as much as the audience.

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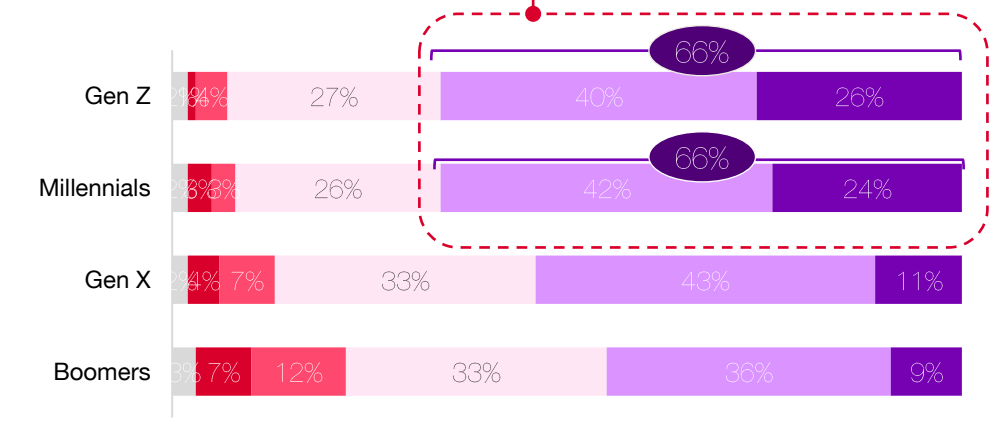
Surprising no one – Gen Z is leading the use of Conversational AI



Use Conversational AI regularly

The surprise? They have a *very* high trust in the answers given

Almost 70% of Gen Z and Millennials **trust the answers AI gives them**, and 1 in 4 state they trust the answers *fully*.



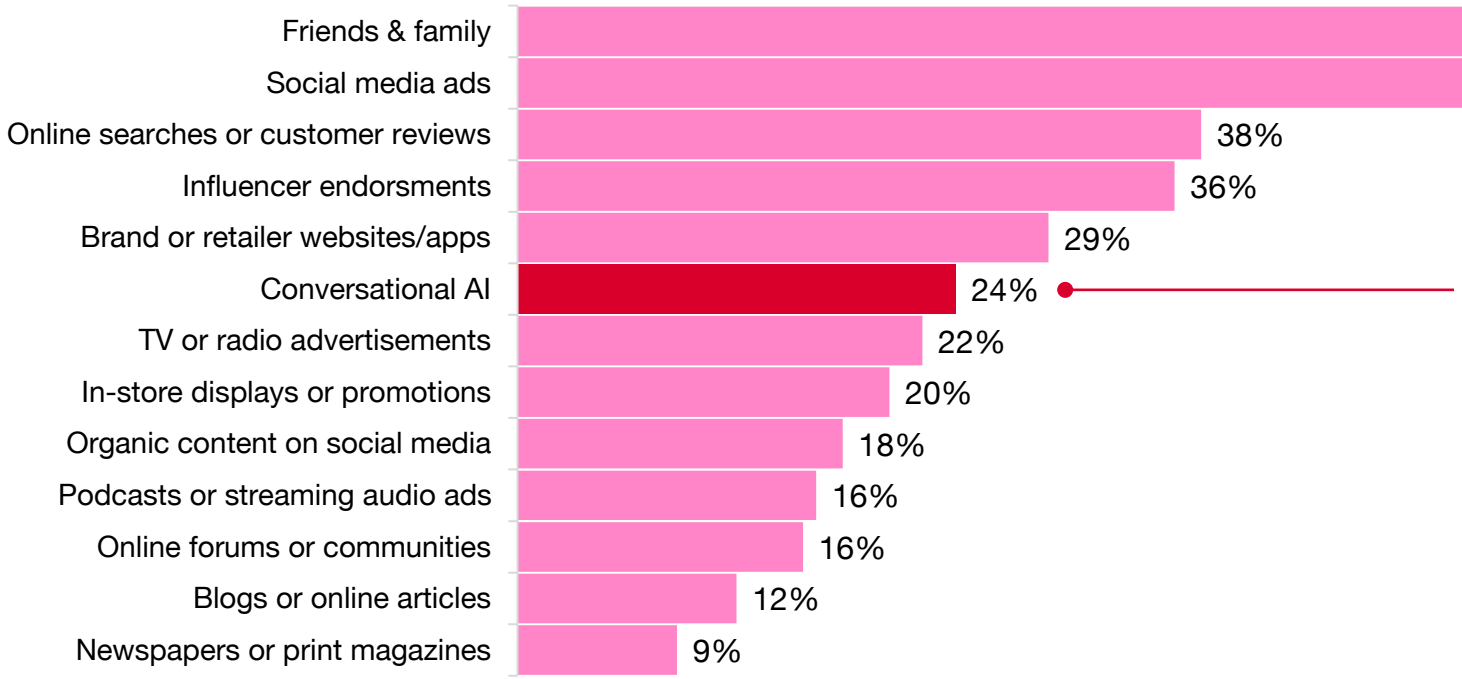
Trust in conversational AI

Don't know | 1 - I don't trust the answers | 2 | 3 | 4 | 5 - I trust the answers fully

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AI is now a Top 6 source of inspiration for Gen Z - outranking traditional media like TV

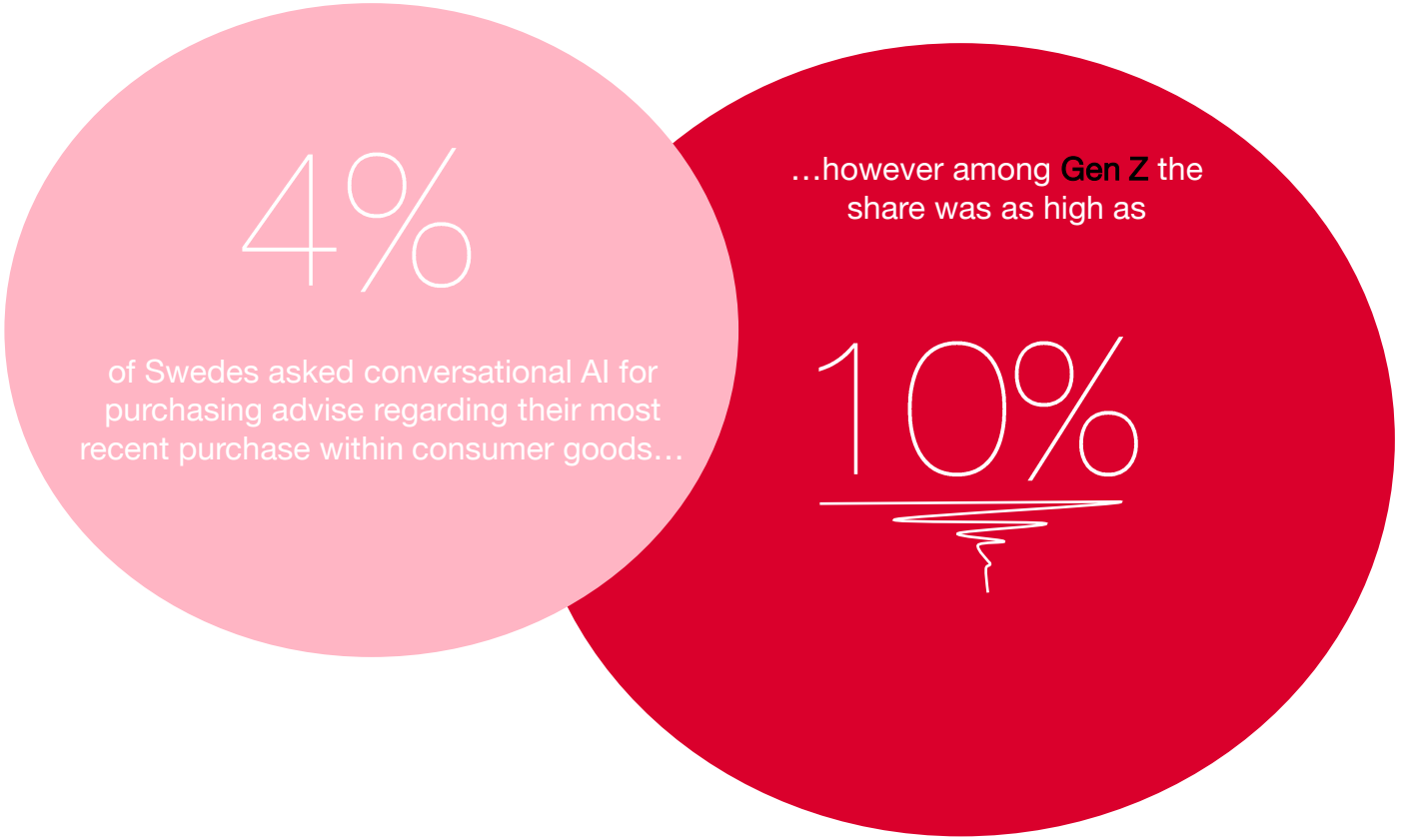
Sources for inspiration and information about new products and services – Gen Z



AI has become a big part of inspiration and information search for products among Gen Z. **1 in 4 use GenAI for inspiration and information search**, placing it ahead of traditional media like TV

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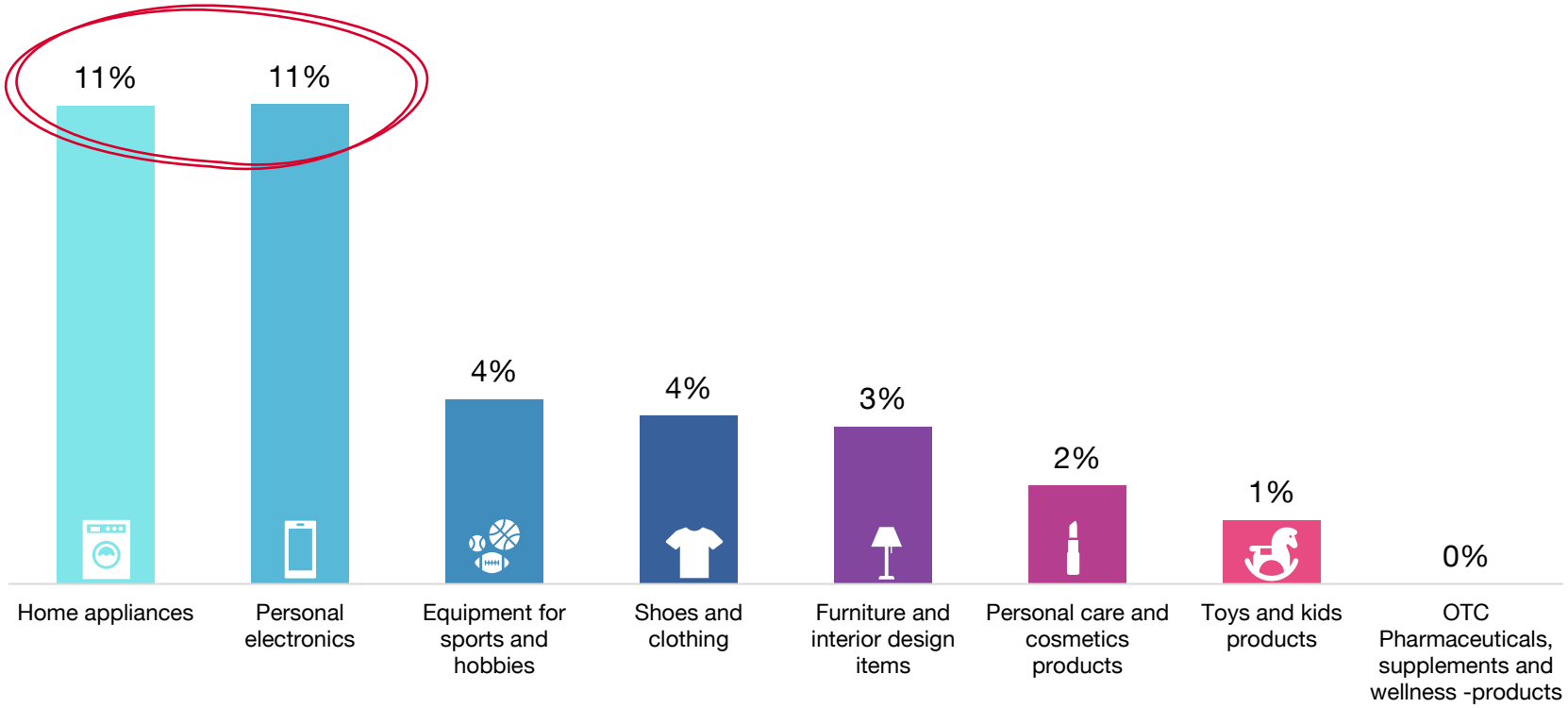
But it's not just about inspiration – AI shaped 1 in 10 of Gen Z's most recent purchases within consumer goods



Used Conversational AI during the most recent purchase within consumer goods

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AI is most widely used within Home appliances and Personal electronics – *for now*

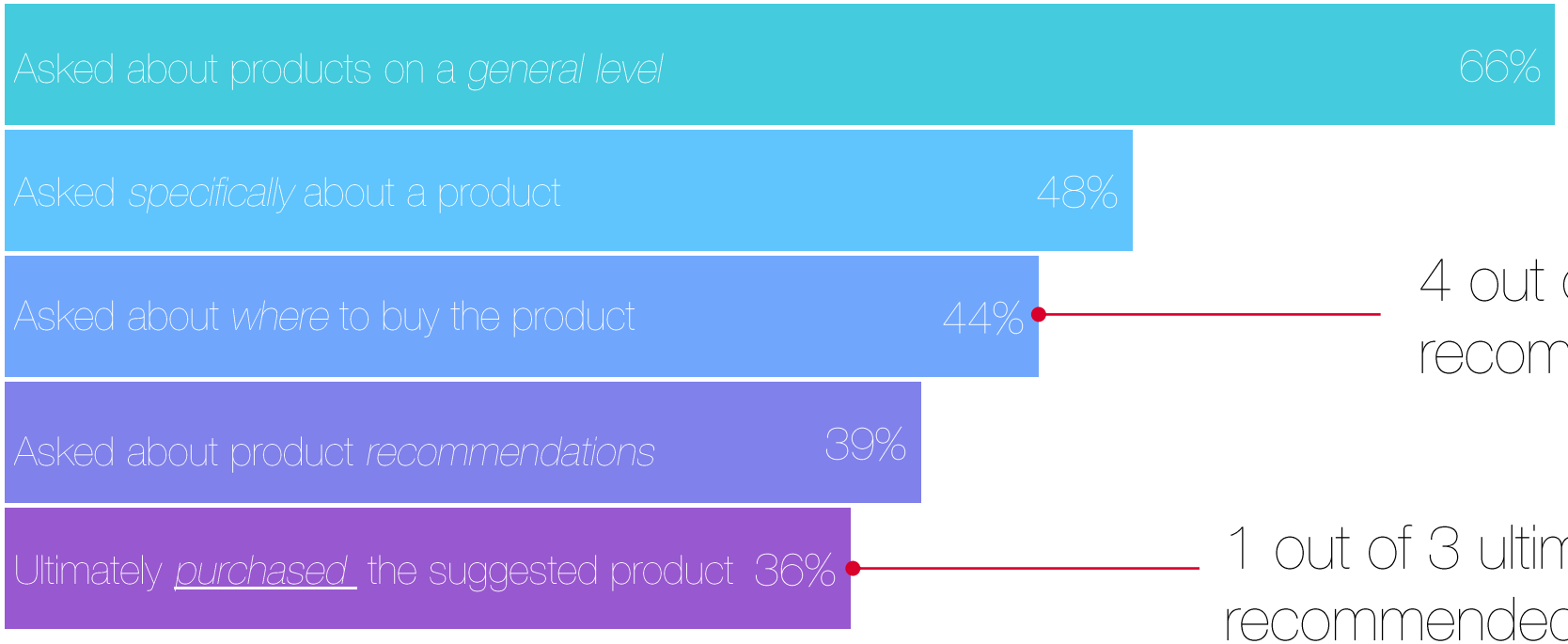


Used conversational AI to research during their most recent purchase – by category

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And for customers who turn to AI - it decides the outcome in every third purchase

AI usage during most recent purchase



4 out of 10 asked about vendor recommendations

1 out of 3 ultimately chose the product recommended by AI

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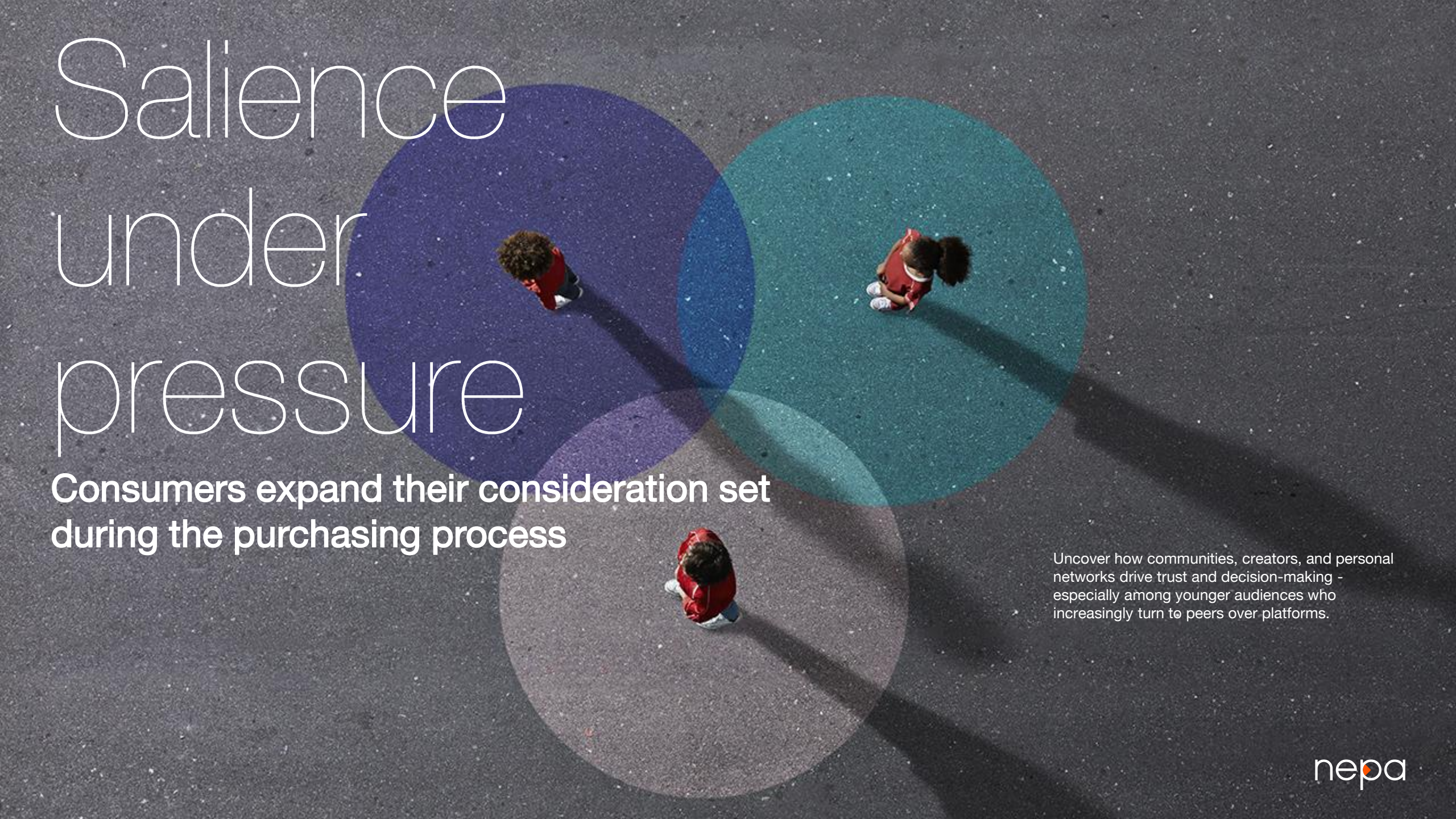
What implications does this have for a brand or a retailer?

- If you don't surface in AI answears, you're invisible
- Own your category entry points
- The more your brand resonate with cunsumers, the less they rely on AI's filtering

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Salience under pressure

Consumers expand their consideration set during the purchasing process



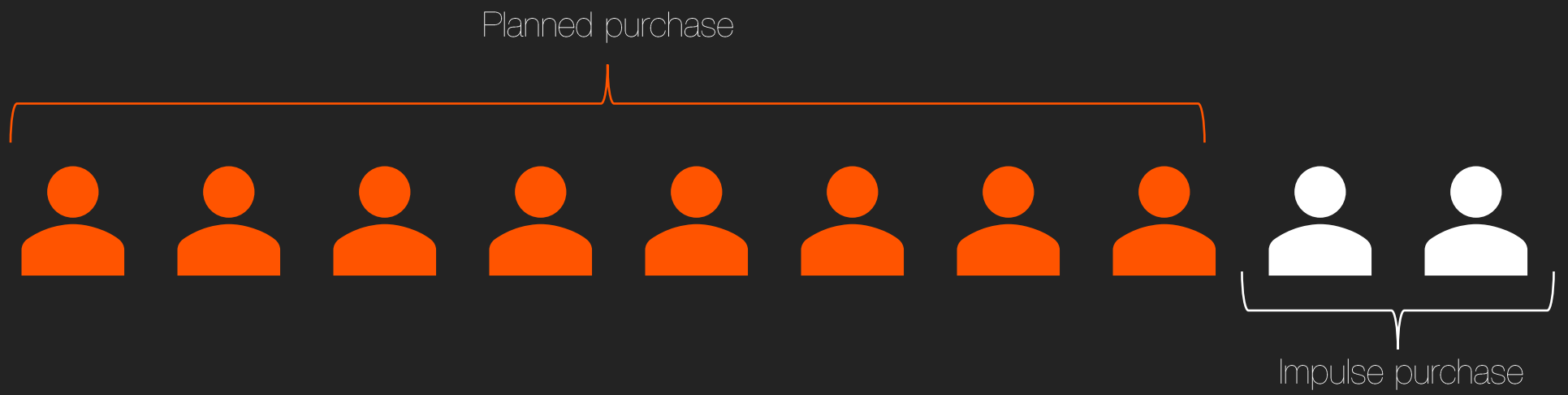
Uncover how communities, creators, and personal networks drive trust and decision-making - especially among younger audiences who increasingly turn to peers over platforms.

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Understanding how consumers change course during the purchase process shows that intent is rarely fixed. It's where brand preference is tested in real time, and where mental availability meets the reality of the shelf.

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Although most of purchases are planned to some degree…



Most recent purchase within consumer goods

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. . .every tenth consumer end up changing the intended product/brand during the purchasing process

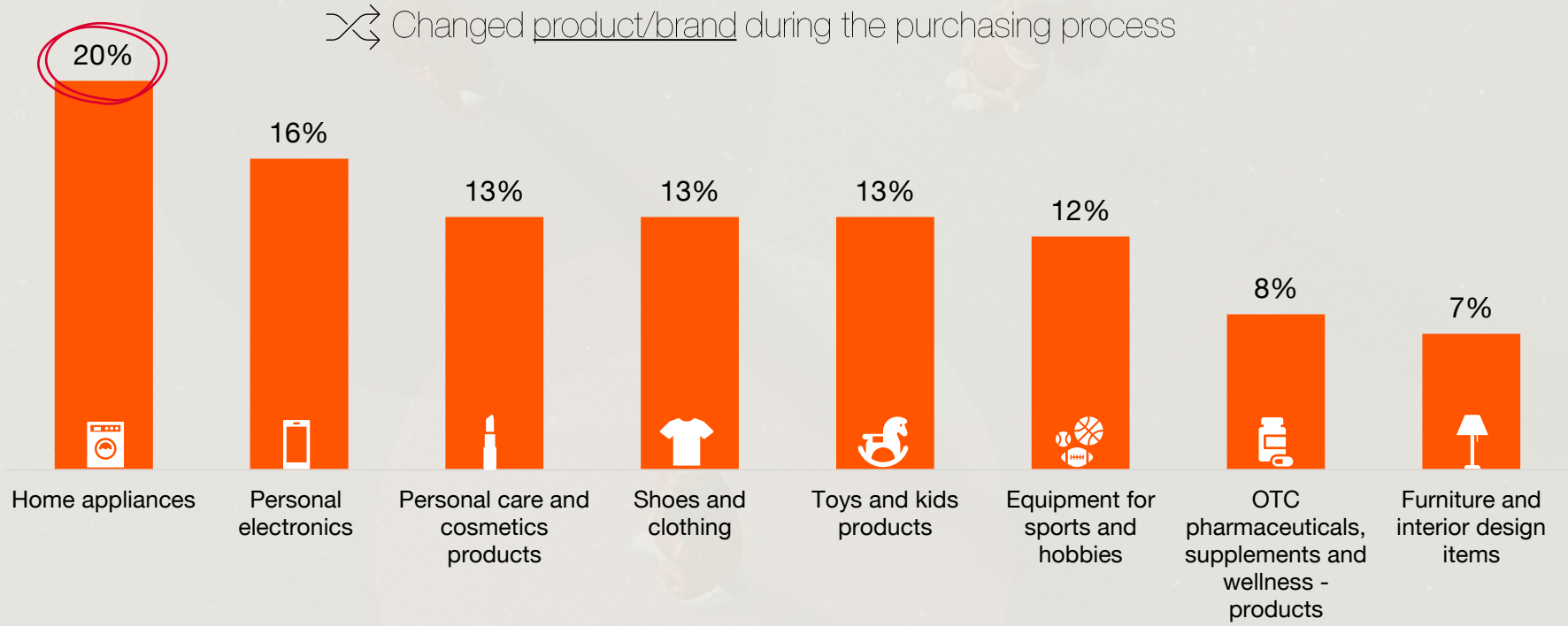


Had a specific product/brand in mind but changed it during the purchase process

Most recent purchase within consumer goods

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Switching products during the purchasing process is most evident within Home appliances followed by Personal electronics



What implications does this have for a brand or a retailer?

- With research and comparisons easier than ever, competition is fierce at every touchpoint
- Brands need to understand what drives consumers to switch – and what keeps them loyal
- To avoid switching, it's critical to communicate what truly sets your brand or products apart

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Growth by insights

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