



FROM CLICKS TO CULTURE

Decoding the Identity Signals in Online Shopping

GALE
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INTRODUCTION

As digital paths to purchase grow increasingly diverse and revealing, online shopping habits in particular have emerged as powerful identity signals in the digital space. Marketers, in turn, need to grapple with the reality that commerce media is not simply solved by showing up in the digital marketplace—consumers’ preferences and behaviors are intricate reflections of generational values, gender perspectives, and individual digital comfort zones.

To better understand this complex landscape, GALE conducted a survey of 2,000 U.S. consumers asking about their relationship with shopping online. Among the findings were some expected trends, such as the growing prevalence of digital purchases; 86% of consumers purchase products online at least once per month, with around half making online purchases at least once per week. These numbers are even higher for Gen Z and Millennials, with 26% and 28%, respectively, reporting *almost daily* online purchases, compared to just 11% of Gen X and 4% of Boomers.

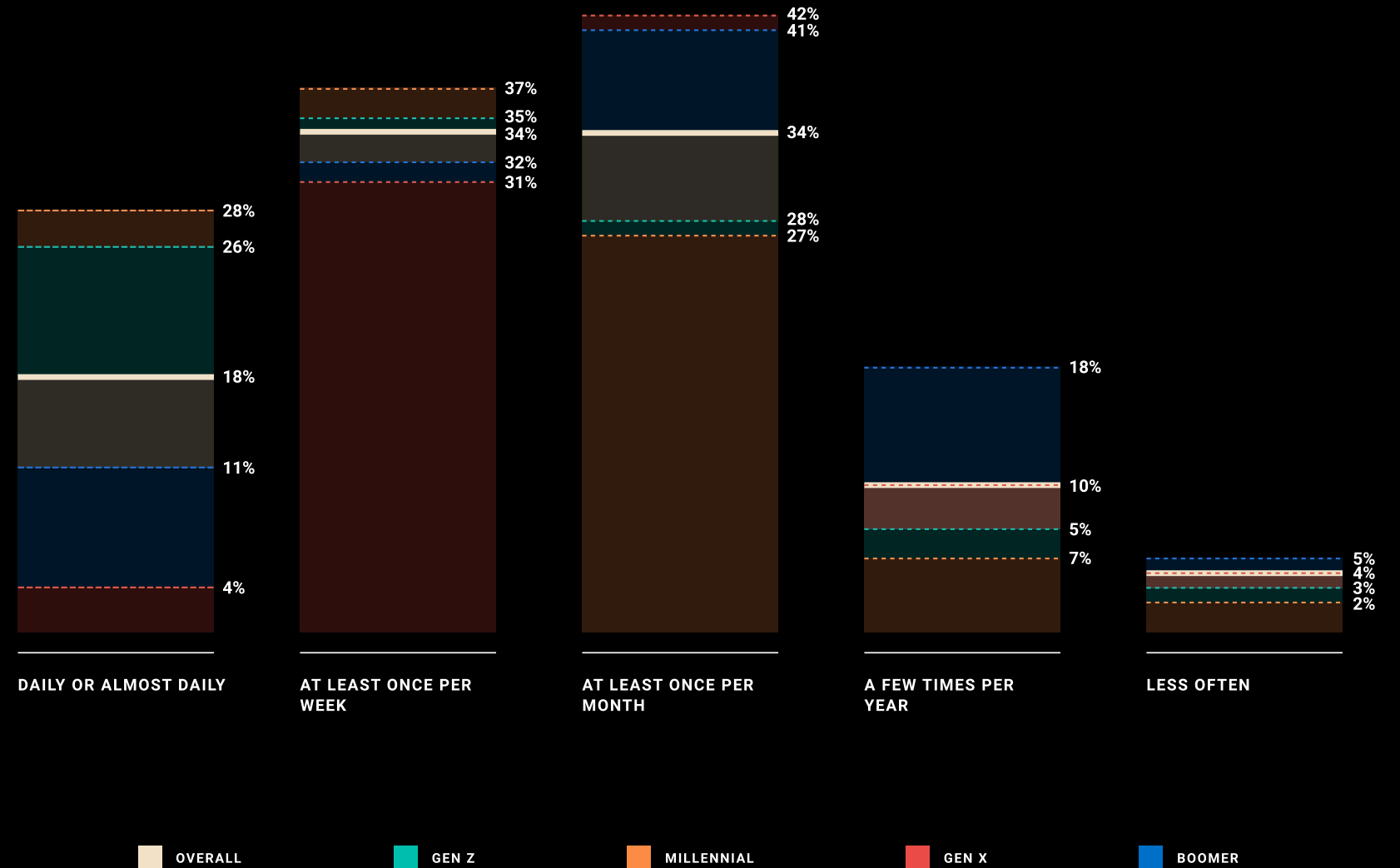
But beyond these top-line statistics, the survey also uncovered nuanced behaviors that challenge common assumptions about different demographic groups’ relationships with commerce media, digital advertising, and the overall shopper journey.

KEY TAKEAWAYS INCLUDE:

- Despite their reputation for being dismissive of advertising, nearly half of Gen Z consumers believe personalized digital ads that know their tastes can be helpful for shopping, with 40% feeling very positive about seeing brands advertise in multiple places.
- While the older generations still prefer shopping in-store more than other age groups, they also rank the highest in their satisfaction scores with their online shopping experiences.
- Almost across the board, Gen X skewed closer to Boomers than Millennials in their responses. While there may be a greater divide between these generations when it comes to things like social issues, their relationship with online commerce likely hinges on whether or not they are “digitally native.”
- Men are generally more likely than women to shop online frequently, make impulse purchases, follow brand accounts, and be influenced by influencers—surprisingly, this trend extends even to categories traditionally associated with women, such as health and beauty products.

Here, we’ll explore the findings and provide insight on what they mean for marketers.

FIG 1: HOW OFTEN DO YOU PURCHASE PRODUCTS ONLINE?



HOBBY SHOPPERS, IMPULSE BUYERS, AND PRACTICAL PURCHASERS

For Gen Z, online shopping is treated like a hobby, sometimes akin to window shopping, that often leads to actual purchases. They're more likely than other generations to shop impulsively and as a way to "treat" themselves; 20% said they'd made an impulse purchase within the last 24 hours, and 33% within the last week. Their impulsiveness is driven by several factors, including wanting a "treat" (29%), retail therapy (28%), boredom (24%), and late-night scrolling (23%). Despite their tendency to impulse shop, Gen Z also seems aware that, sometimes, they're just shopping for fun. Thirty percent cite "if I realized I'm being impulsive" as a top reason they might not follow through with an online purchase, second only to "unexpected extra costs"; other generations were more likely to cite issues like not meeting the minimum for free shipping or no free returns/exchanges.

At the other end of the spectrum, Boomers are practical and intentional with their online shopping. They're more likely than other generations to purchase everyday essentials online, such as personal care products, and nearly a quarter say they've never made an online impulse purchase. When Boomers do buy impulsively, the primary reasons are limited-time sales (38%) or the product satisfying an immediate need (22%). Additionally, 11% of Boomers still prefer in-store shopping, the highest percentage among all age groups.

Millennials display online shopping habits similar to Gen Z in terms of shopping frequency and engagement with and appreciation of ads, though for them, it's less of a hobby. Gen X falls somewhere in between—more similar to Millennials in some ways, though more like Boomers in most.

Men tend to be more impulsive online shoppers than women, especially in categories including electronics, travel products, home goods/improvement, beauty products, and toys/hobbies. Their impulse purchases are most driven by limited availability, late-night scrolling, and boredom. In contrast, women are more likely to abandon their carts at checkout. For example, 50% of women, compared to 40% of men, said unexpected extra costs would stop them from completing a purchase. Similarly, 41% of women, versus 25% of men, would cancel an order if they didn't meet the minimum for free shipping.

FIG 3: PERCENT WHO SAY THEY'VE NEVER MADE AN IMPULSE PURCHASE ONLINE

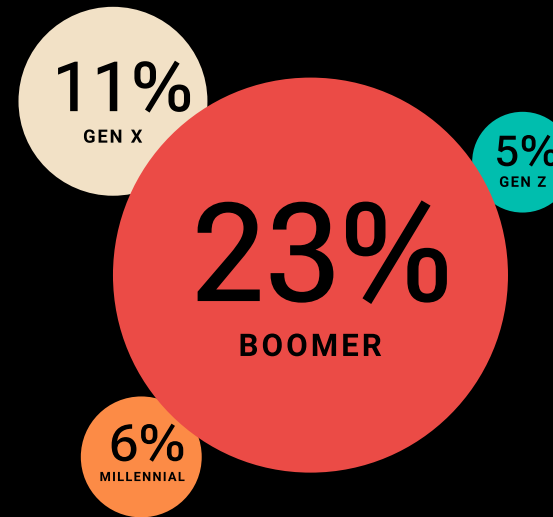


FIG 4: PERCENT WHO SAY THEY'VE MADE AN IMPULSE PURCHASE ONLINE IN THE PAST 24 HOURS

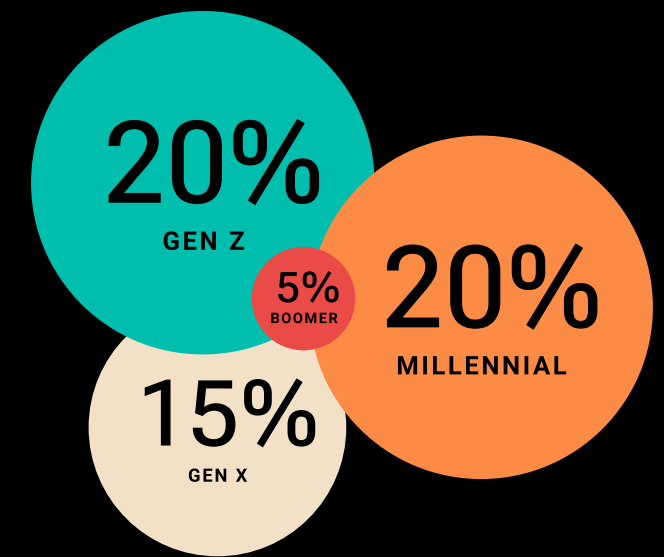


FIG 2: WHAT FACTOR(S) CONTRIBUTED TO YOUR MOST RECENT ONLINE IMPULSE PURCHASE?

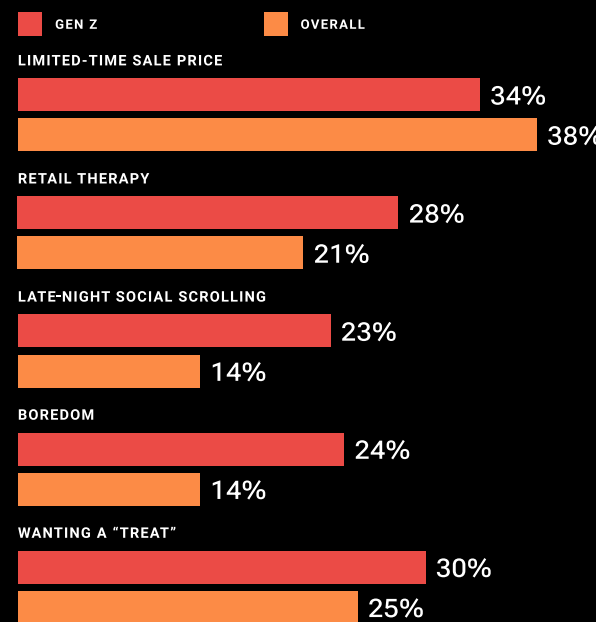
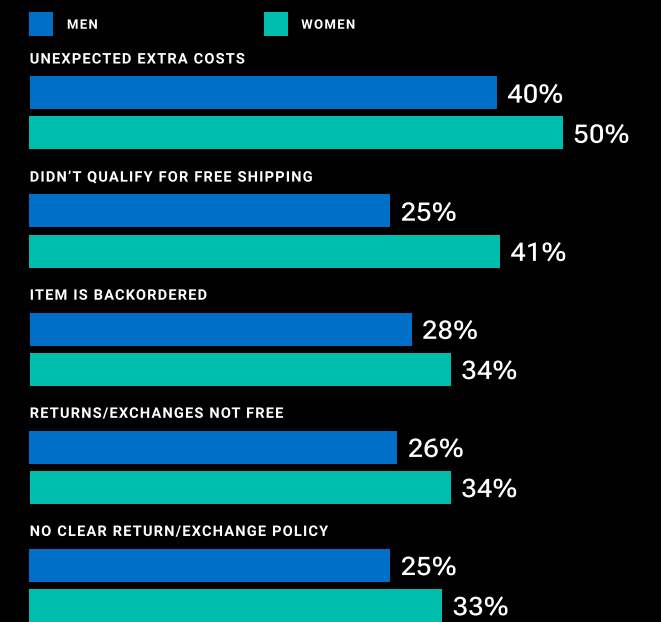


FIG 5: WHEN SHOPPING ONLINE, WHAT MIGHT STOP YOU FROM FOLLOWING THROUGH WITH A PURCHASE?



HOBBY SHOPPERS, IMPULSE BUYERS, AND PRACTICAL PURCHASERS

ACROSS ALL DEMOGRAPHICS, HOWEVER, EVERYONE AGREES:

- Availability is the primary reason consumers make a purchase online rather than in-store, with nearly half (47%) saying they do this when “I need to buy something that is not available nearby.”
- Price and shipping time are the top important factors when making an online purchase, outweighing brand name. For high-cost items (\$500+), however, return policies become more important than shipping time.
- Limited-time sales are the leading driver of online impulse purchases. Notably, 73% do not regret their most recent impulse purchase—although Gen Z, Millennials, and men, who exhibit more impulse-shopping, were slightly more likely to express regret.

FIG 6: TOP REASONS CONSUMERS CHOOSE TO MAKE A PURCHASE ONLINE
% THAT AGREE THEY USUALLY PURCHASE THIS ONLINE RATHER THAN IN STORE

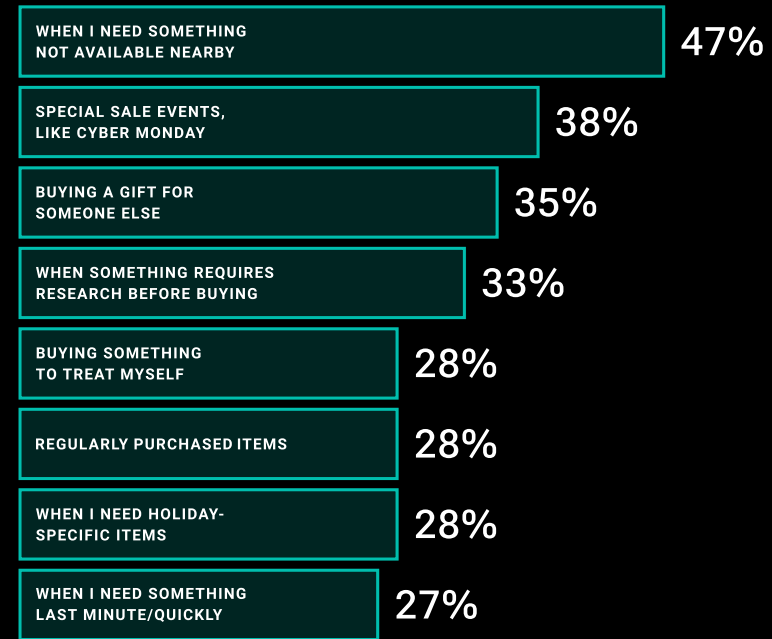
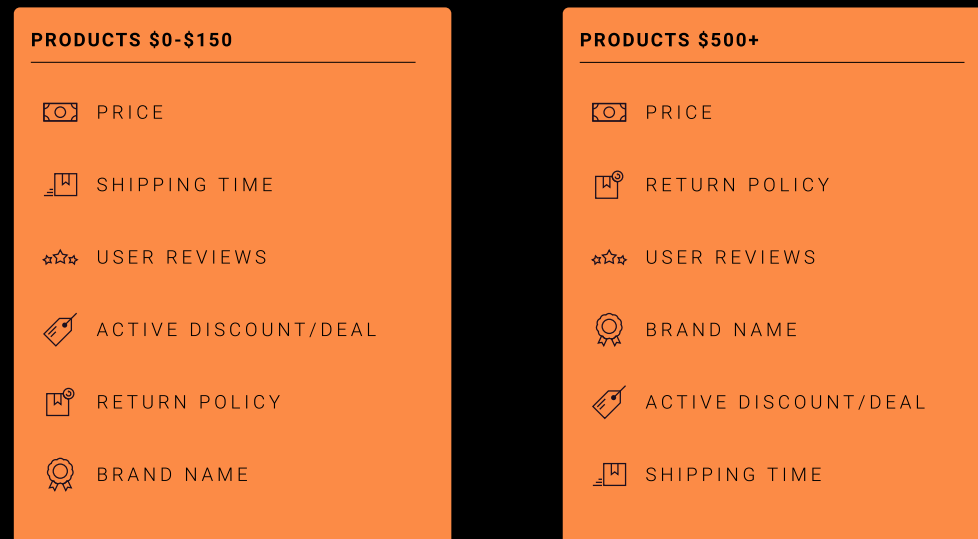


FIG 8: TOP REASONS CONSUMERS MADE AN IMPULSE PURCHASE ONLINE
% THAT AGREE THIS WAS A CONTRIBUTING FACTOR



FIG 7: RANKING OF MOST IMPORTANT FACTORS FOR ONLINE PURCHASES



OLD FOOTPRINTS AND INTEGRATED EXPERIENCES

Sixty percent of consumers report being satisfied with their current online shopping experience, which includes both online and in-person touchpoints. Top ways consumers stay updated on their favorite brands—such as tracking sales or new product releases—include visiting the brand’s website (33%), subscribing to the brand’s email list (23%), and visiting the brand’s physical store (22%).

When asked to consider the majority of their online purchases over the past year, 45% said they went directly to the website or platform where they could buy the product, without looking for information anywhere else. A quarter of all consumers and about 30% of Gen Z and Millennials, however, said they went to the website/platform after seeing the product in person. When researching products online, consumers ranked the brand’s website as one of most helpful resources, with “going to see it in person” outranking both a brand’s social media channels and influencer testimonials.

Top reasons consumers choose to buy online rather than in-store, beyond availability, include special sale events like Cyber Monday (38%), buying gifts for someone else (35%), and needing an item that requires some research before buying (34%). Boomers are most likely to purchase gifts for someone else (42%) while Gen Z are more likely to “treat” themselves (38%) or shop to celebrate a personal milestone (21%). Of those who regularly buy everyday items online, 71% have signed up for at least one “subscribe and save” service, with Gen Z and Millennials most likely to do so.

In general, men are more likely than women to proactively pull brands or branded content into their social media feeds as a part of their online shopping experience. Men are more likely to follow a brand’s social media account (22% vs 15%), follow an influencer (17% vs 9%) or brand founder (16% vs. 9%) who shares items/sales of a brand they like, and follow social media accounts of stores that carry the brand (20% vs. 12%). Men were also more likely to recall a time when content they previously saw from an influencer impacted their purchasing decisions (33% vs 22%). Given this, paid digital content may be even more critical in reaching women, with a higher bar for authenticity and platform relevance.

Overall, about half (54%) of consumers are very open to new technologies being incorporated into their shopping experience, with younger generations generally more open to it. Those who are more open to new technology were also more likely to feel that personalized ad targeting is a helpful part of their shopping experience.

FIG 9: TOP WAYS CONSUMERS STAY UPDATED ON THEIR FAVORITE BRANDS TO SHOP
% THAT AGREE THIS IS SOMETHING THEY DO

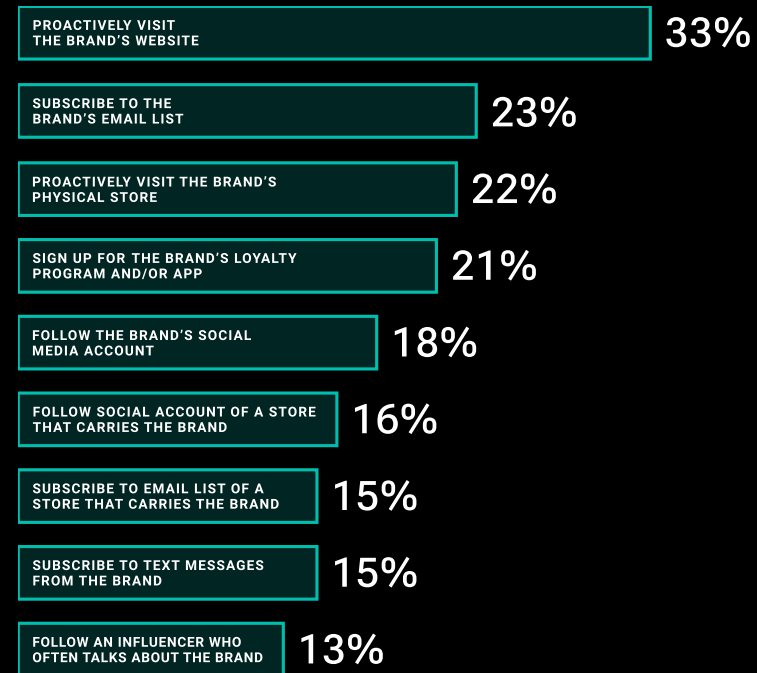


FIG 10: MEN ARE MORE LIKELY TO ADD BRAND CONTENT TO THEIR SOCIAL FEEDS
% THAT AGREE THIS IS SOMETHING THEY DO TO STAY UPDATED ON THEIR FAVORITE BRANDS TO SHOP

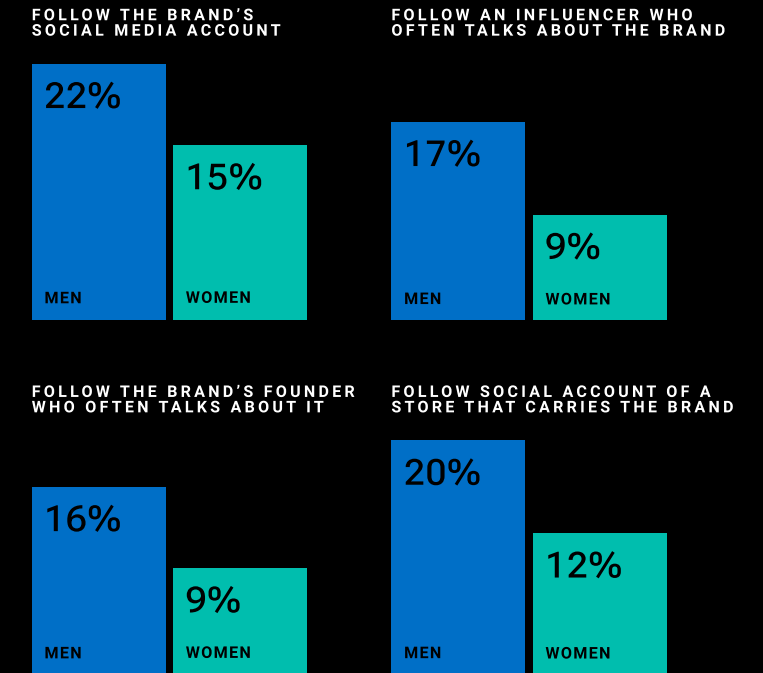
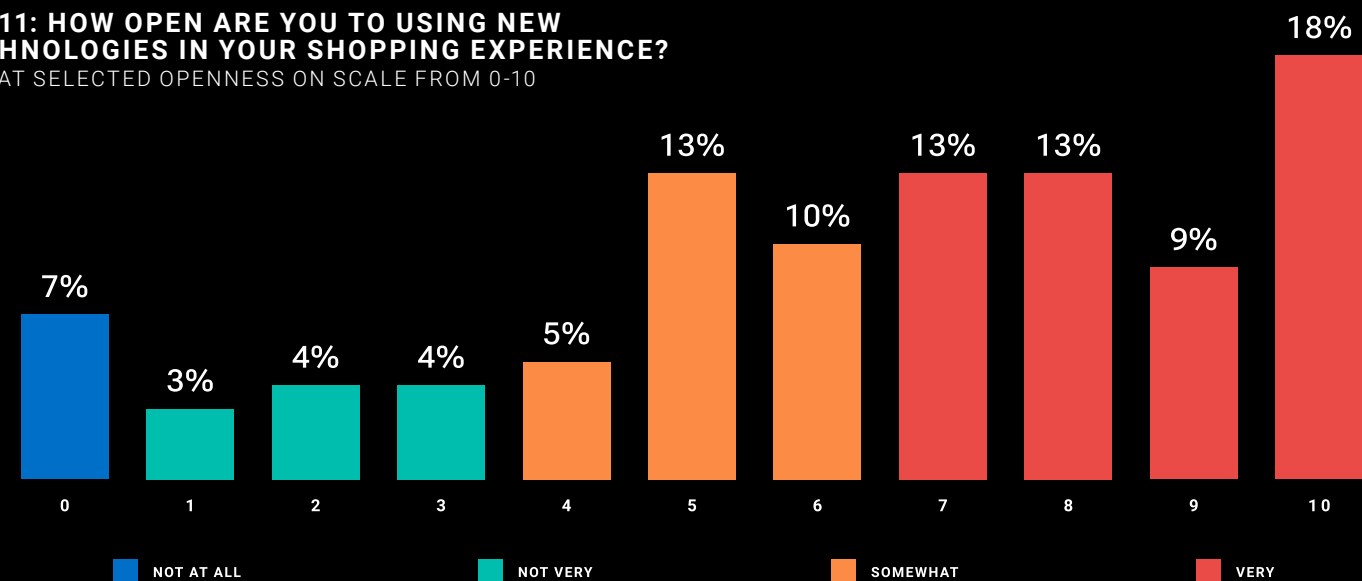


FIG 11: HOW OPEN ARE YOU TO USING NEW TECHNOLOGIES IN YOUR SHOPPING EXPERIENCE?
% THAT SELECTED OPENNESS ON SCALE FROM 0-10



A NEW RELATIONSHIP WITH ADS AND INFLUENCERS

Consumers generally have positive sentiments around advertising as part of their shopping journey, and seem to have an understanding that personalization can be beneficial.

When it comes to brands advertising in multiple places—across social, email, OOH, etc.—less than 6% reported any negative sentiment towards this and only 3% said their feelings depend on the brand or what the ad looks like. Gen Z (40%) and Millennials (43%) were most likely to feel very positive about this and find it helpful to see the brand in many ways and places. The majority (44%) believe that being served personalized digital ads that know your tastes can be helpful in finding things they want to buy—that number jumps for Millennials (55%) and Gen Z (48%).

Likely impacting their perspective on this, 80% of Gen Z and Millennials can recall a time when they purchased a product directly after seeing a digital ad for it, with 27% of Gen Z and 30% of Millennials saying *most* of their online purchases over the past year were made this way. Nearly 30% of all consumers can recall a time where content they previously saw from an influencer impacted their decision-making on what to buy in the past year—that number jumps to about 40% for Gen Z and Millennials.

Among those who were persuaded by an influencer, several touchpoints were noted as contributing to their decision to make a final purchase, with the top being: social media ads (38%), online reviews or testimonials (36%), influencer videos (36%), search engine results (31%), recommendations from friends/family (31%), and ads on a website where the product could be purchased (26%). This emphasizes that influencers themselves are just part of the shopper journey for many, and it's necessary for brands to show up in consistent ways across multiple touchpoints—including earning a spot in cultural conversations—to earn a final purchase.

Again, men were more likely to openly embrace advertising than women, more likely to feel very positive about ads in multiple places. Men were more likely to say they'd been influenced by online ads, including influencer links to a retailer, LTK or affiliate links, influencer blog posts, and ads on YouTube, Instagram, Snapchat and X. Women (46%) were more likely than men (32%) to say they don't ever recall purchasing a product directly after seeing an ad for it.

FIG 12: HOW OFTEN DID YOU PURCHASE SOMETHING DIRECTLY AFTER SEEING A DIGITAL AD FOR IT?
% THAT AGREE THIS IS ACCURATE ABOUT THEIR PURCHASES OVER THE PAST YEAR

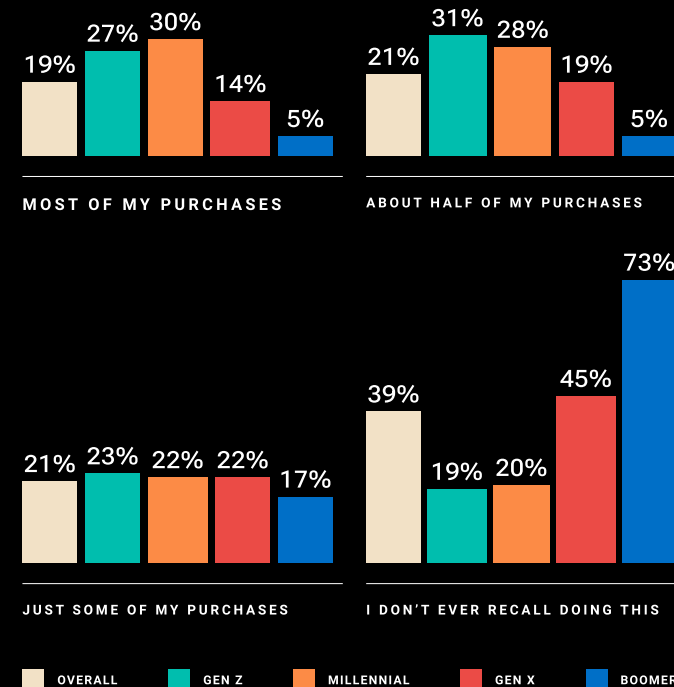


FIG 13: TOUCHPOINTS THAT DROVE A FINAL PURCHASE AFTER SEEING INFLUENCER CONTENT FOR A PRODUCT/SERVICE
% THAT AGREE THIS INFLUENCED THEIR DECISION TO PURCHASE THE ITEM

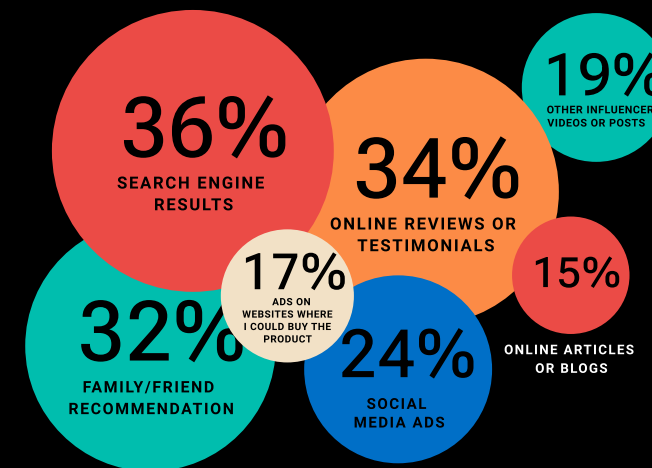
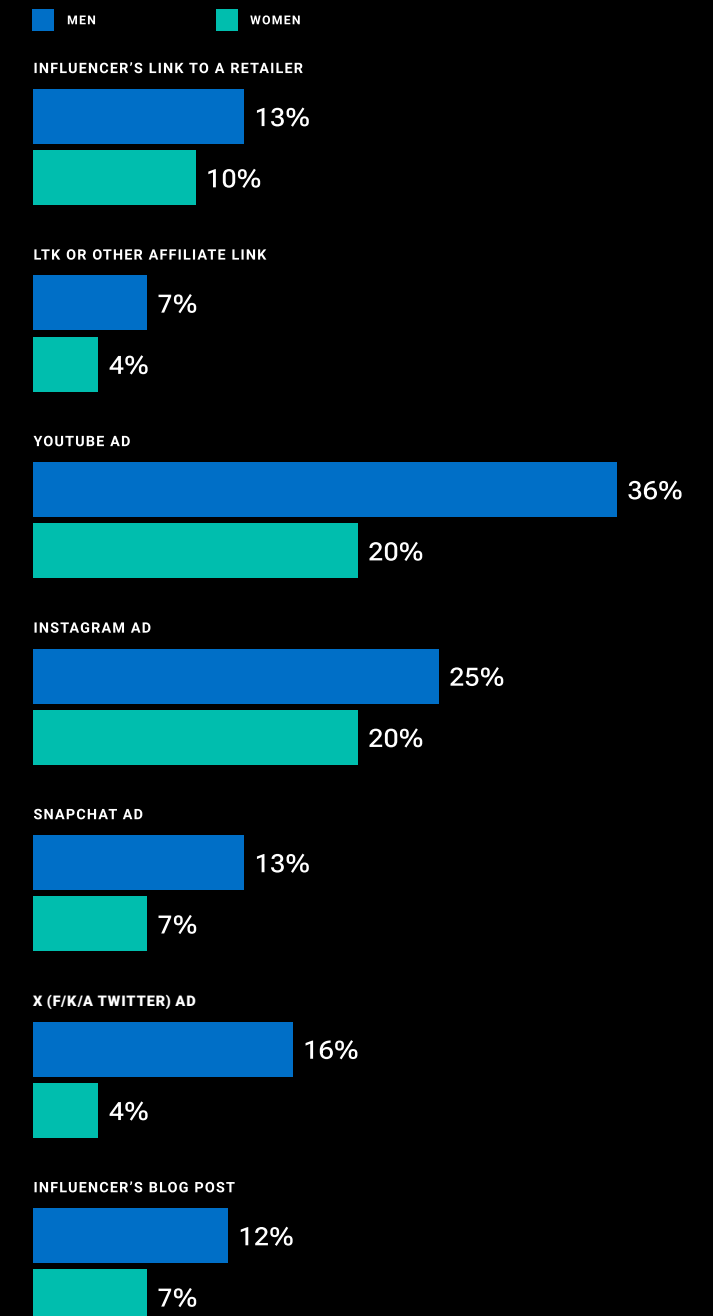


FIG 14: MEN REPORT BEING MORE INFLUENCED BY DIGITAL ADS THAN WOMEN
% THAT AGREE THIS HAS LED THEM TO PURCHASING A PRODUCT OR SERVICE



CATEGORY SCORECARD

Our survey examined consumer behavior and attitudes across nine main categories: Electronics, Fashion/Apparel, Groceries, Alcohol, Travel, Meal Delivery, Home Goods or Improvement, Beauty and Health, Toys and Hobbies. Below are category highlights from their responses.

FIG 15: TOP CATEGORIES FOR . . .

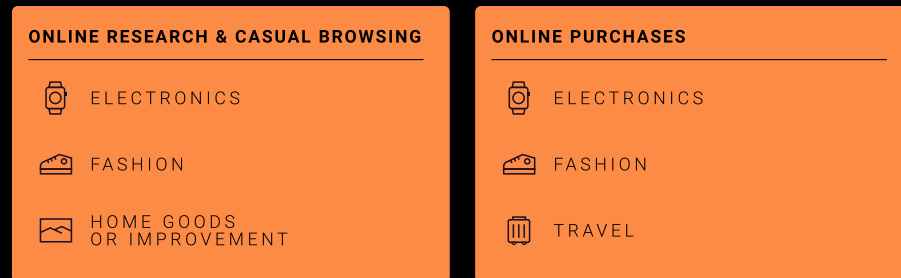


FIG 18: TOP-RANKED RESOURCE FOR SHOPPING RESEARCH

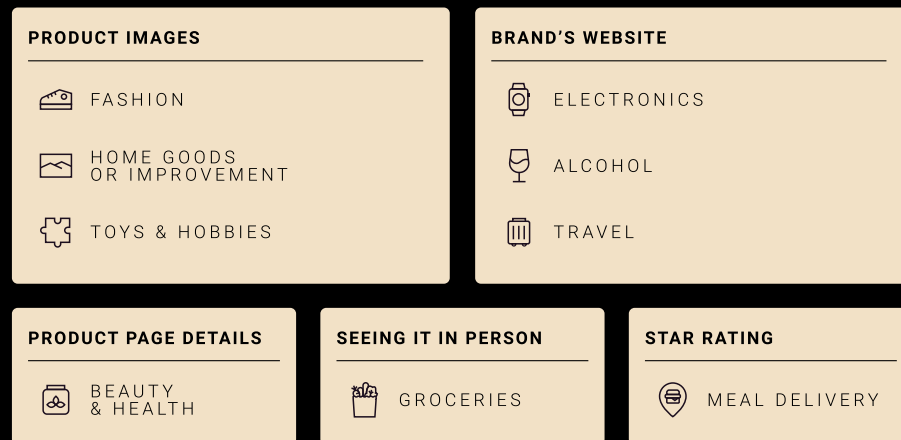


FIG 16: TOP CATEGORIES CONSUMERS FIND HARD TO SHOP FOR ONLINE
% THAT AGREE THEY FIND THIS CATEGORY DIFFICULT TO SHOP FOR ONLINE

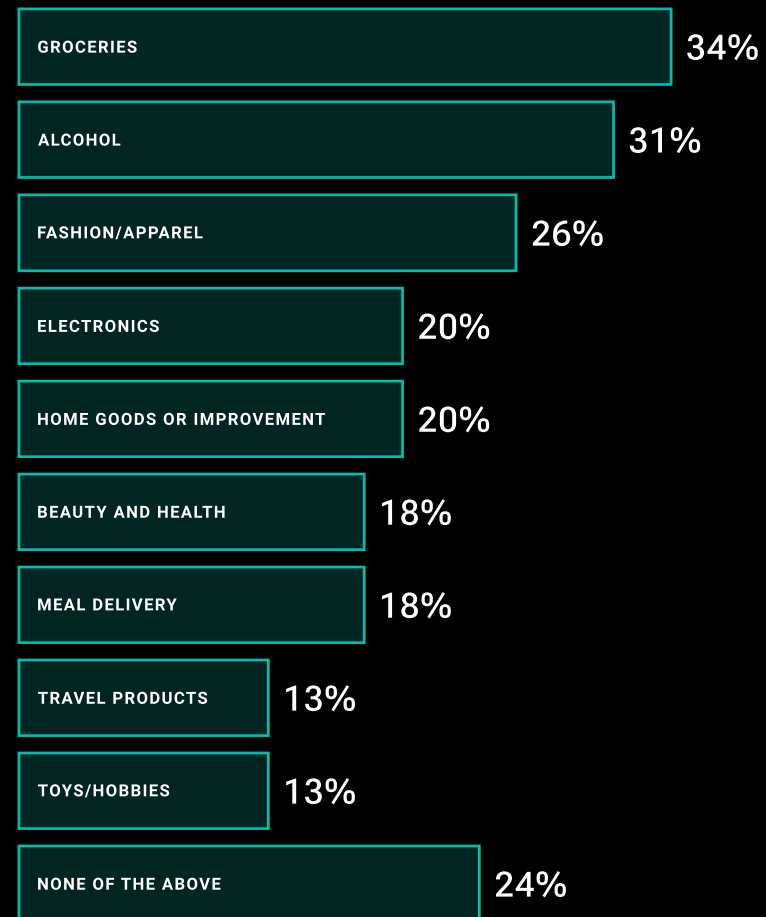
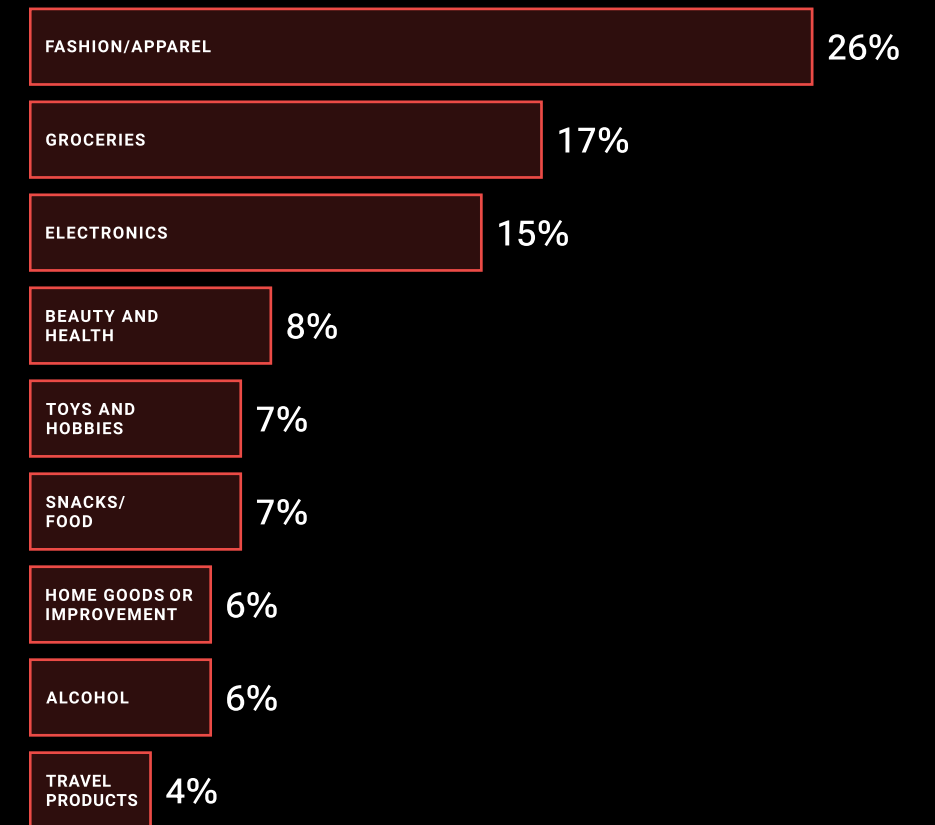


FIG 17: WHAT CATEGORY DOES YOUR MOST RECENT IMPULSE PURCHASE FALL INTO?



PLATFORM SCORECARD

Our survey asked respondents a series of questions about their shopping experiences on specific digital platforms. Their responses are captured below. Among the highlights, Target.com earned most agreement that ads on their platform can be helpful, and YouTube earned most agreement that seeing ads on their platform led to a purchase.

FIG 19: DIGITAL PLACEMENTS THAT LED TO A PURCHASE
% THAT SAID THIS HAS LED THEM TO BUY A PRODUCT OR SERVICE

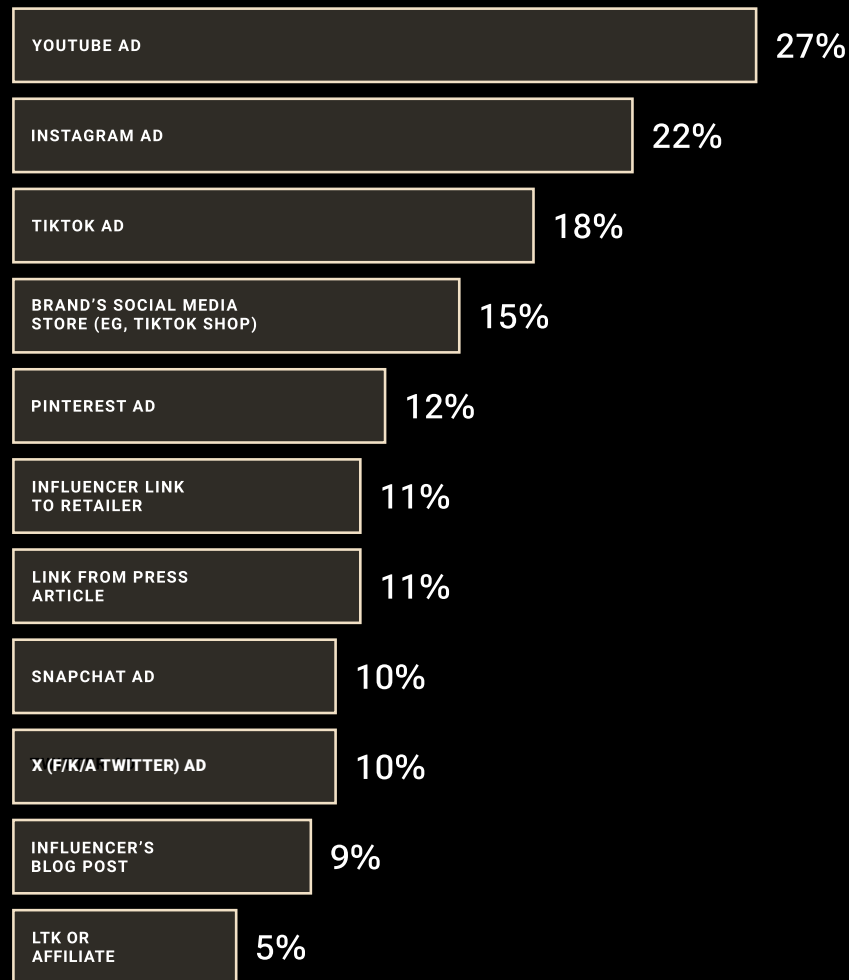
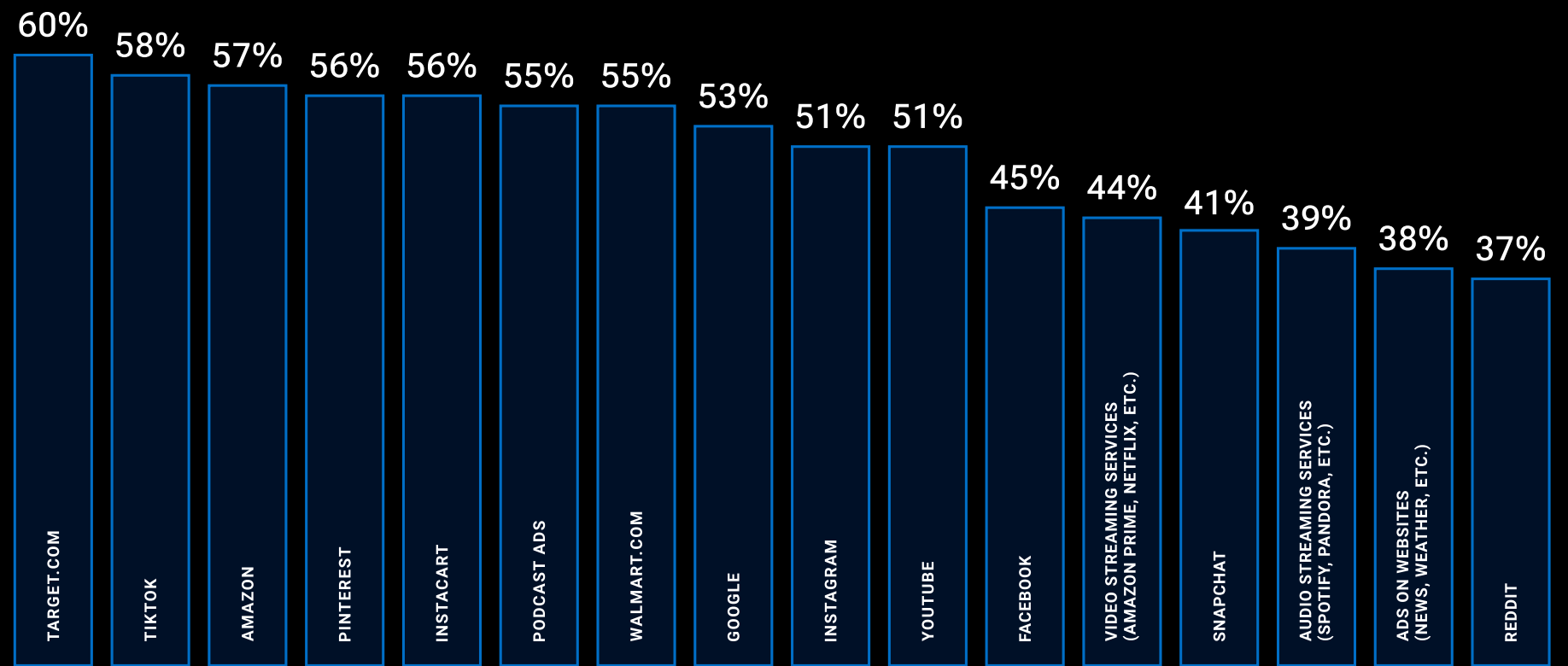


FIG 20: PLATFORMS CONSUMERS SAY HAVE HELPFUL ADS
% THAT AGREE ADS ON THIS PLATFORM CAN BE HELPFUL



AS WE DECODE THE IDENTITY SIGNALS IN ONLINE SHOPPING, SEVERAL KEY INSIGHTS EMERGE THAT HAVE SIGNIFICANT IMPLICATIONS FOR MARKETERS:

ADVERTISING APPRECIATION:

As more consumers, particularly younger generations, grow comfortable with digital commerce, they appreciate ad targeting and personalization. They seem to understand its role and how it can be helpful to their shopping experience. Consumers largely have positive sentiment towards brands appearing across multiple channels (e.g., social, email, website ads, OOH) as well, regardless of which brand it is. Marketers should constantly make use of the expanding contextual and addressable targeting levers to serve up unique, personal and, most importantly, relevant ad experiences.

CATEGORY-SPECIFIC STRATEGIES ARE ESSENTIAL:

Shopping behaviors vary dramatically across product categories, reflecting complex interactions between consumer identities, practical needs, and emotional drivers. For instance, while influencer content may drive fashion purchases for Gen Z, it may be less effective for grocery shopping among Boomers. Similarly, the factors driving conversion in electronics, such as detailed product specifications, differ significantly from those in beauty products, where visual representation is key. Marketers must thoroughly understand their specific category dynamics and tailor their content and strategies accordingly.

BUILDING TRUST WITH BOOMERS:

For older generations, transparency and trust are key to converting online sales. Ensure clear pricing, straightforward return policies, and a simplified shopping process to address their wariness of unexpected costs. While Boomers prefer a direct, efficient online shopping experience, younger generations enjoy “browsing” digital spaces much like previous generations did in malls. Marketers should create digital environments that cater to these differing preferences.

GEN Z: HYPER-ONLINE YET SELF-AWARE:

While Gen Z is often characterized as being constantly connected, turning to the digital world for both browsing and purchasing, our survey reveals a level of self-awareness in their shopping habits. This generation shows an understanding of their own impulsivity, presenting an opportunity for brands to offer value-driven promotions that align with their desire for self-reward. Moreover, Gen Z’s community-oriented nature suggests that brands should foster a sense of belonging and shared experience in their marketing efforts.

PRICE SENSITIVITY ACROSS GENERATIONS:

Economic considerations play a crucial role in online shopping behaviors across all age groups, but manifest in different ways. From deal-seeking Millennials to Boomers who prioritize free shipping, marketers must tailor their pricing and promotion strategies to resonate with each generation’s specific economic priorities.

PLATFORM DIVERSITY FOR GEN Z:

Contrary to popular belief, our survey found that YouTube ads (36%) were more influential than TikTok ads (30%) for Gen Z. This challenges the assumption that TikTok is the one-stop shop for reaching this demographic. Marketers should develop diverse content strategies across platforms, leveraging YouTube’s longer-form content alongside TikTok’s short-form appeal to maximize engagement with Gen Z.

OMNICHANNEL PRESENCE REMAINS CRUCIAL:

Despite the surge in online shopping, consumers across all demographics still value in-person experiences as part of their shopping journey. This underscores the need for integrated online and offline strategies, creating a seamless brand experience that resonates with consumers regardless of their preferred shopping channel.

LOOKING AHEAD

The digital marketplace is not a one-size-fits-all environment. As online shopping habits continue to evolve and reflect complex identity signals, marketers must adapt their strategies to address the nuanced preferences and behaviors of different demographic groups. By understanding these digital comfort zones and crafting tailored, omnichannel experiences, brands can more effectively connect with consumers—wherever and however they choose to shop.