

# 2025 The Digitally Influenced Shopper

# Why digital is the doorway to all retail sales



# About this study

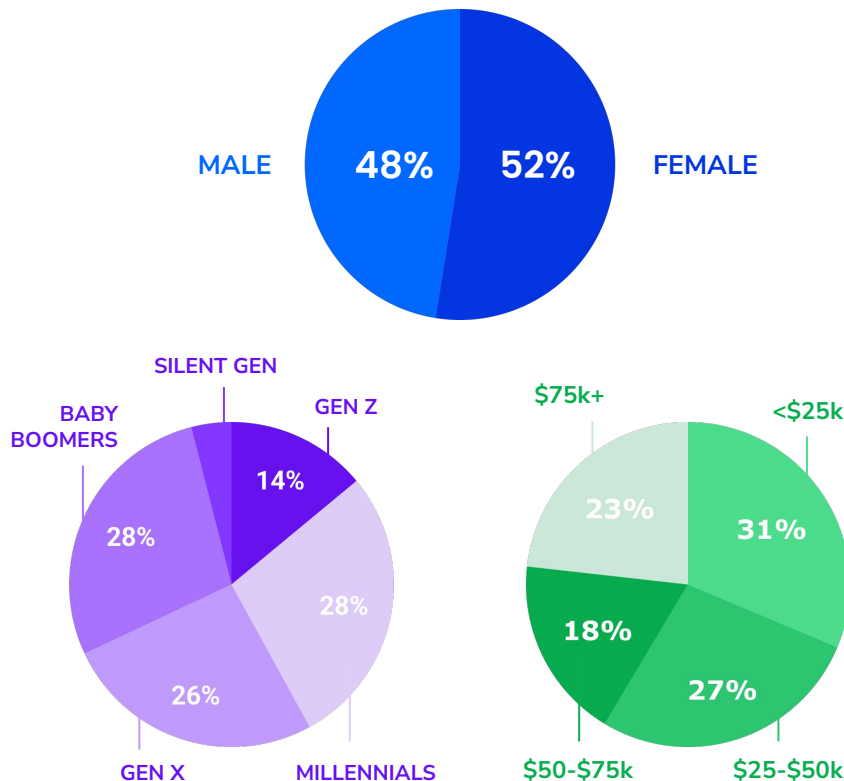
In 2023, Profitero published its first Digitally-Influenced Shopper study to help eCommerce leaders quantify the hidden impact of digital touchpoints—like the digital shelf—on all retail sales, both in-store and online. While other research firms pioneered this type of analysis, it has not been updated with post-COVID data, prompting us to provide a more current view.

We repeated our study this year, surveying 4,000 household decision-makers across the US, UK, Germany and Canada. This report features US-specific insights from a 1,000-person panel.

## What's new this year compared to our 2023 study?

- ◆ We highlight how digitally-influenced shopping behaviors differ by generation
- ◆ We go deeper into how digitally-influenced shoppers find products, including the emerging role of AI shopping assistants

Nationally representative sample of US primary or **joint household purchase** decision-makers.



# Digital isn't just a channel; it's the doorway to most purchase decisions

In 2024, 76% of CPG omnichannel growth came from eComm (Circana\*). Yet brands continue to underinvest, or misallocate resources, in digital commerce, viewing it as a small share of total sales. With growing economic pressures, that underinvestment is at risk of continuing as brands prioritize limited resources. This a mistake.

As our 2023 study showed, digital touchpoints influence retail sales far more than eCommerce sales figures alone suggest. Brand leaders must take heed and ensure digital investment levels match this true influence.

The influence of digital on all retail purchases is **3X larger** than the traditional eComm sales penetration figures most brands use as a basis for investment.

TRADITIONAL VIEW



ECOMM  
PENETRATION **20%\***

DIGITALLY-INFLUENCED  
REALITY

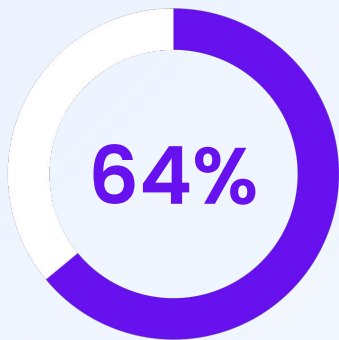
ACTUAL DIGITAL  
INFLUENCE **64%**

## PART ONE

# Decoding the digitally influenced shopper

1

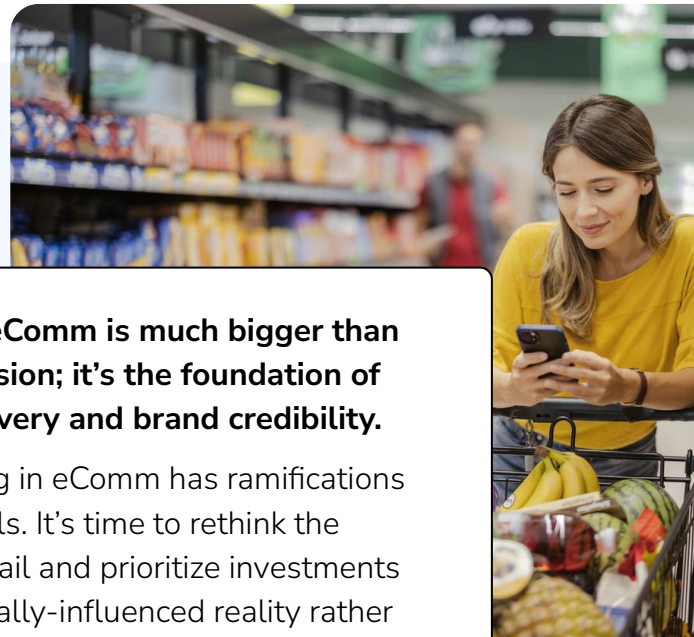
# Digital touchpoints drive purchases: online and in-store across all categories



of shoppers are influenced by digital touchpoints\*

*The level of influence varies by vertical with Electronics leading the pack at 79%*

[Click here for full category breakdown](#)



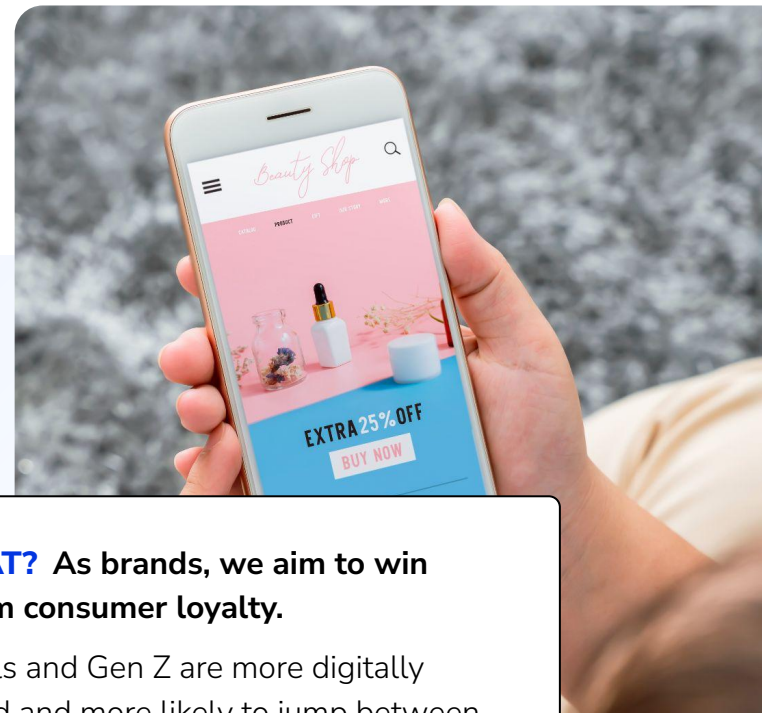
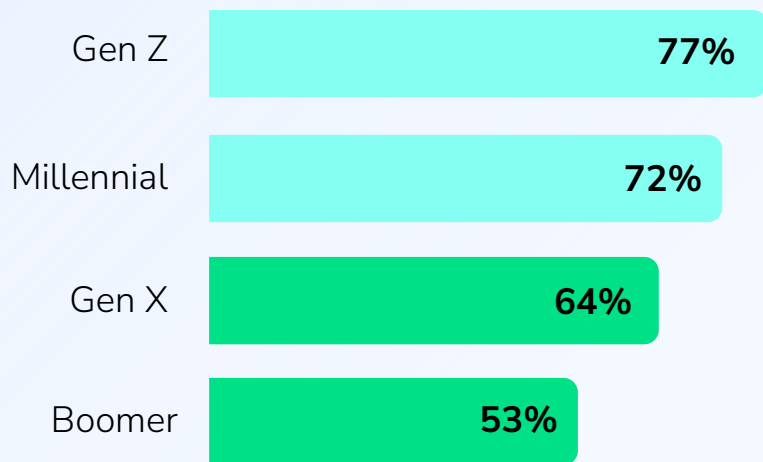
**SO WHAT?** eComm is much bigger than online conversion; it's the foundation of product discovery and brand credibility.

Underinvesting in eComm has ramifications across channels. It's time to rethink the formula for retail and prioritize investments based on digitally-influenced reality rather than digitally-closed assumptions.

2

## The future is digital — just ask Millennials & Gen Z

% of shoppers influenced by digital touchpoints\*



**SO WHAT?** As brands, we aim to win long-term consumer loyalty.

Millennials and Gen Z are more digitally influenced and more likely to jump between brands. Earning their long-term loyalty will require brands to consistently demonstrate superior value via digital touchpoints.

3

## Your content is doing the work — it's time it got the recognition

54%

are more likely to buy a product because of its content and reviews on a retailer's site than in-store signage and displays

59%

agree that the quality of a brand's content on a retailer website has a strong impact on their perception of the brand

**SO WHAT?** Your online content is hugely influential in brand success.

Online content is your packaging, marketing and store associate rolled into one. Poor content risks credibility, conversion, SEO traffic and delisting if content-health & compliance issues persist.

Audit your digital shelf regularly and invest in high-quality, consistent product content at scale to drive trust and conversion everywhere shoppers shop.



4

## The lifetime value of your shoppers hinges on digital discoverability

57%

of shoppers are more likely to discover new brands browsing retailer websites than in-store

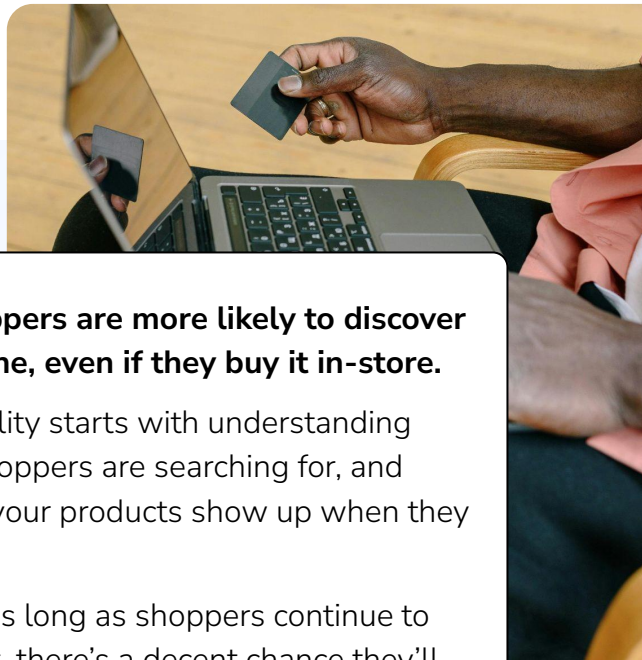
51%

of shoppers are influenced by past purchases — the 2nd highest, after price

**SO WHAT?** Shoppers are more likely to discover your product online, even if they buy it in-store.

Digital discoverability starts with understanding what keywords shoppers are searching for, and then making sure your products show up when they do.

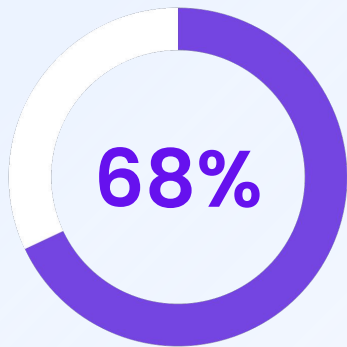
The good news? As long as shoppers continue to value your product, there's a decent chance they'll buy it again, especially in high-repeat categories like food and beverage.





5

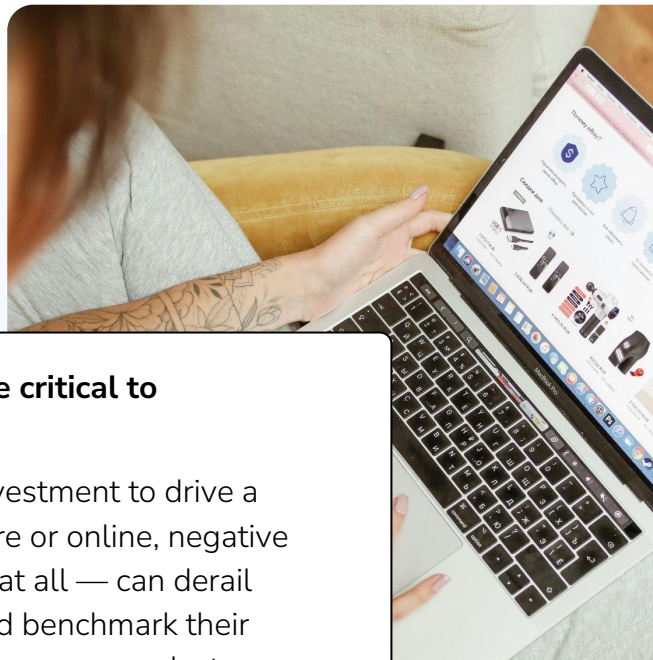
## Reviews are the difference between winning or losing new shoppers



of shoppers will avoid trying a new product when shopping online if it has bad ratings and reviews

**SO WHAT?** Reviews are critical to establishing credibility.

After all the effort and investment to drive a purchase, whether in-store or online, negative reviews — or no reviews at all — can derail conversion. Brands should benchmark their current portfolio and ensure new products launch with authentic, syndicated reviews.





## A WORD FROM THE EXPERTS

**Digital isn't only about adding to your business; it's about protecting the omnichannel business you already have. Ignore digital, and watch your share erode EVERYWHERE.**



**Todd Hassenfelt**

Global Digital Commerce Sr Director,  
Colgate-Palmolive

## PART TWO

# Unlocking the door for the digitally influenced shopper

1

BE DISCOVERABLE

2

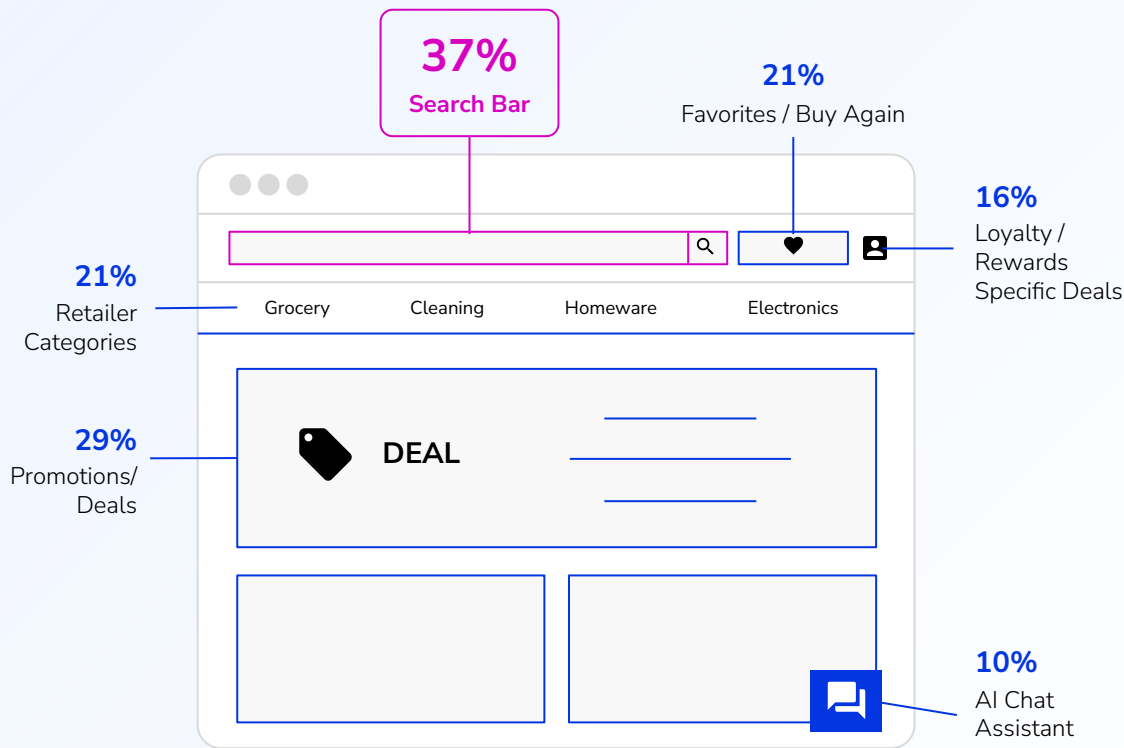
BE CONVINCING

3

BE VALUABLE

# You risk being invisible if you're not winning search

- ◆ Most shoppers start with the search bar
- ◆ This trend holds up across all categories, though shoppers are 28% more likely to navigate through Favorites / Buy Again when buying Food & Beverage
- ◆ AI chat assistants are still emerging but expected to rise



*Most popular ways to navigate  
a retailer site.*

BE DISCOVERABLE

BE CONVINCING

BE VALUABLE

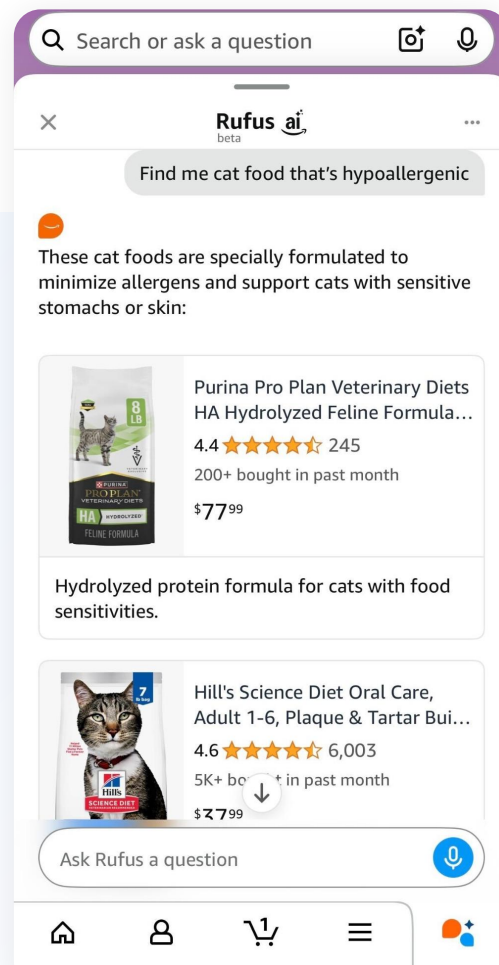
# Adoption isn't widespread yet, but AI-led shopping is the next frontier

1 in 12

are already using AI Chatbots  
when researching what to  
purchase and to hunt for deals

2X

Gen Z & Millennials are two  
times more likely to do this vs.  
Gen X & Boomers

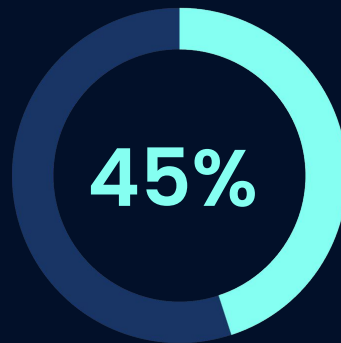


# Younger shoppers turn to the digital shelf when they can't find the product on the physical shelf

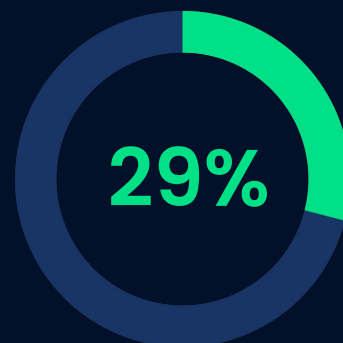
When shopping in-store, what do you do most often if your usual product is out of stock?



Gen Z and Millennials



Gen X and Boomers



BE DISCOVERABLE

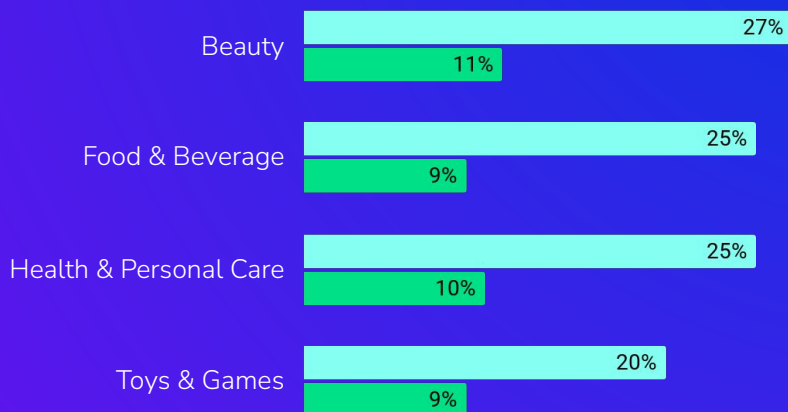
BE CONVINCING

BE VALUABLE

# Social media continues to be a discovery destination for Gen Z and Millennials

Have you purchased anything from the following categories on TikTok shop in the past 12 months?

■ Gen Z and Millennials ■ Gen X and Boomers



1 in 6

say purchases are swayed by social media influencers

Gen Z and Millennials



Gen X and Boomers



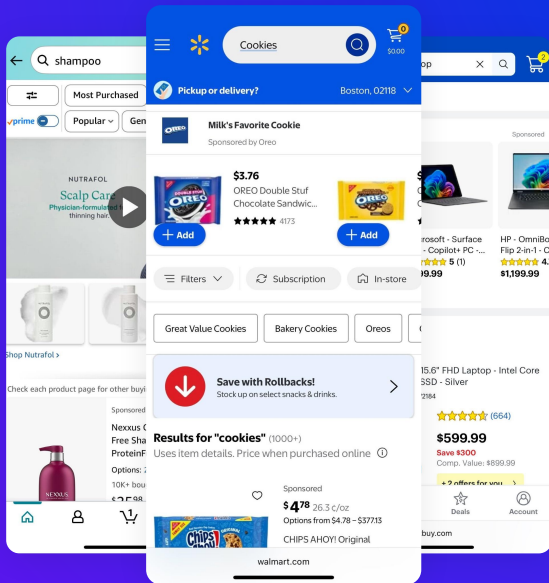


BE DISCOVERABLE

BE CONVINCING

BE VALUABLE

# Digital discovery isn't just about social — retail media has a role to play, especially for the next generation

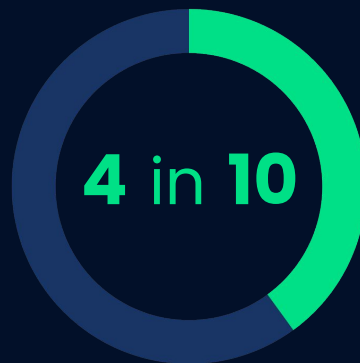


**1 in 2** say purchases can be influenced by suggested/sponsored search results

Gen Z and Millennials



Gen X and Boomers





## A WORD FROM THE EXPERTS

Bringing products and brands to life on the digital shelf is a shared effort between retailers and brands. It's no longer just about the right images or keywords—it's about using retailers' 1st party data to craft personalised purchase journeys with tailored messaging at every touchpoint, digital or physical. **Strong retailer partnerships are essential to increasing digital visibility** and discoverability.



**Anh-Mai Vu**

Global e-Business Director,  
Ceva Santé Animale

BE DISCOVERABLE

BE CONVINCING

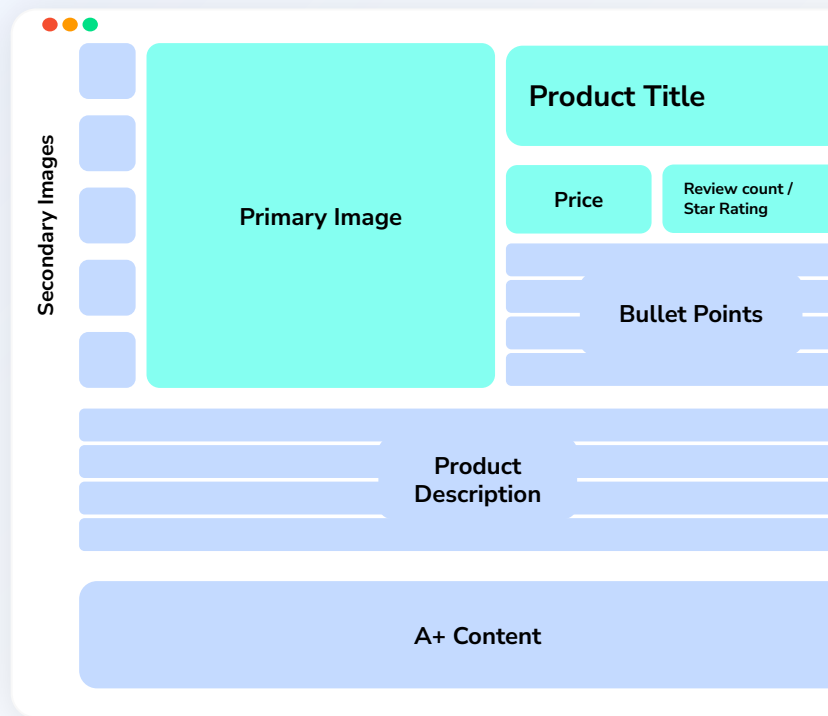
BE VALUABLE

# Your content needs to convince shoppers at the search page

If shoppers don't click through to your PDP, you must work hard to show your value using only the title, hero image, price and star rating.



shoppers regularly skip the PDP and add straight to cart from search



# Poor digital shelf execution can lead to sales loss in-store and online and worse, brand switching

## 6 in 10

shoppers will switch if a similar brand is advertised at a lower price

## 4 in 10

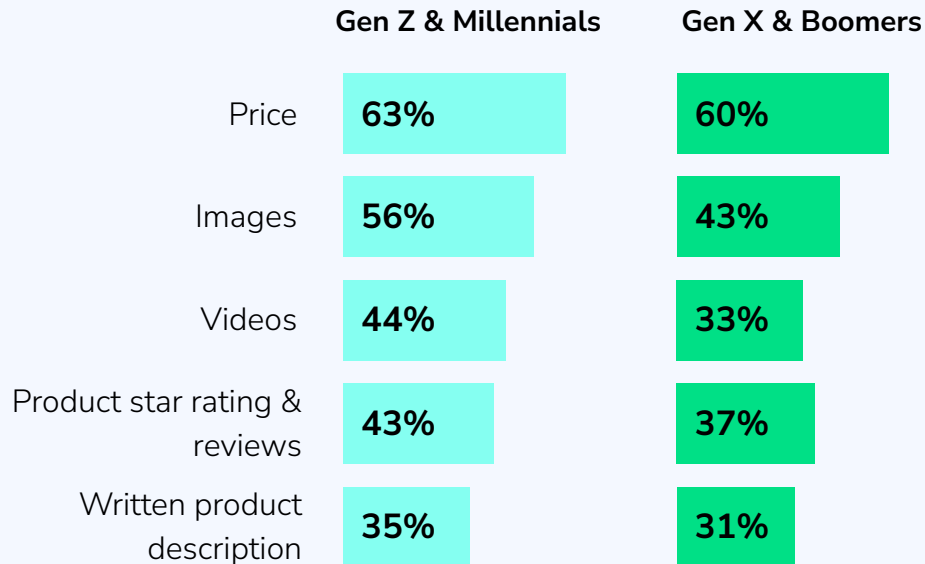
shoppers are influenced by ratings and reviews — third biggest after price and past purchases

## 1 in 3

shoppers will switch brands if you're out of stock online

# When shoppers discover your products on social media, the PDP is key to conversion

When shopping on retailer websites or apps, which of these product page elements do you review before purchasing a product you saw advertized or recommended on social media?





## A WORD FROM THE EXPERTS

Best-in-class digital shelf execution isn't optional—it's a revenue safeguard. If your product isn't in stock, it can't be bought. If your reviews don't build trust, consumers will look elsewhere. And as AI agents increasingly guide purchase decisions, **showing up with the right content is more critical than ever.** Ignore the digital shelf basics, and you're handing your sales to the competition.



**Lauren Livek Gilbert**  
Executive Director,  
The Digital Shelf Institute

# Shoppers aren't looking for cheapest, they're looking for best value

Shoppers are tightening their spending. Even if they say they aren't planning to switch to private label, many categories are seeing their share eroded by store brands. To avoid a race to the bottom, brands must differentiate their products and show why they're worth the premium.

- ◆ **Strengthen value messaging** with smart bundles, online exclusives, LTOs, co-branded partnerships and licensing
- ◆ **Stand out** in online search results, emphasize your brand's differentiation in your hero image and title

## 62%

are adjusting their shopping behaviors to match their budgets

But only....

## 16%

are *planning* to switch to private label



# Brands need to work harder to prove their value to the next generation

Gen Z and Millennials are **less brand loyal** than Gen X and Boomers. They are more likely **swayed by visual content** like videos or advertising.

## Influenced by past purchases

45%

Gen Z and Millennials

54%

Gen X and Boomers

## Which of the following factors typically influence your decision to make a purchase?

Factors that index higher for younger generations

 Gen Z and Millennials  Gen X and Boomers

Videos on the product page  
on a retailer website / app

25%

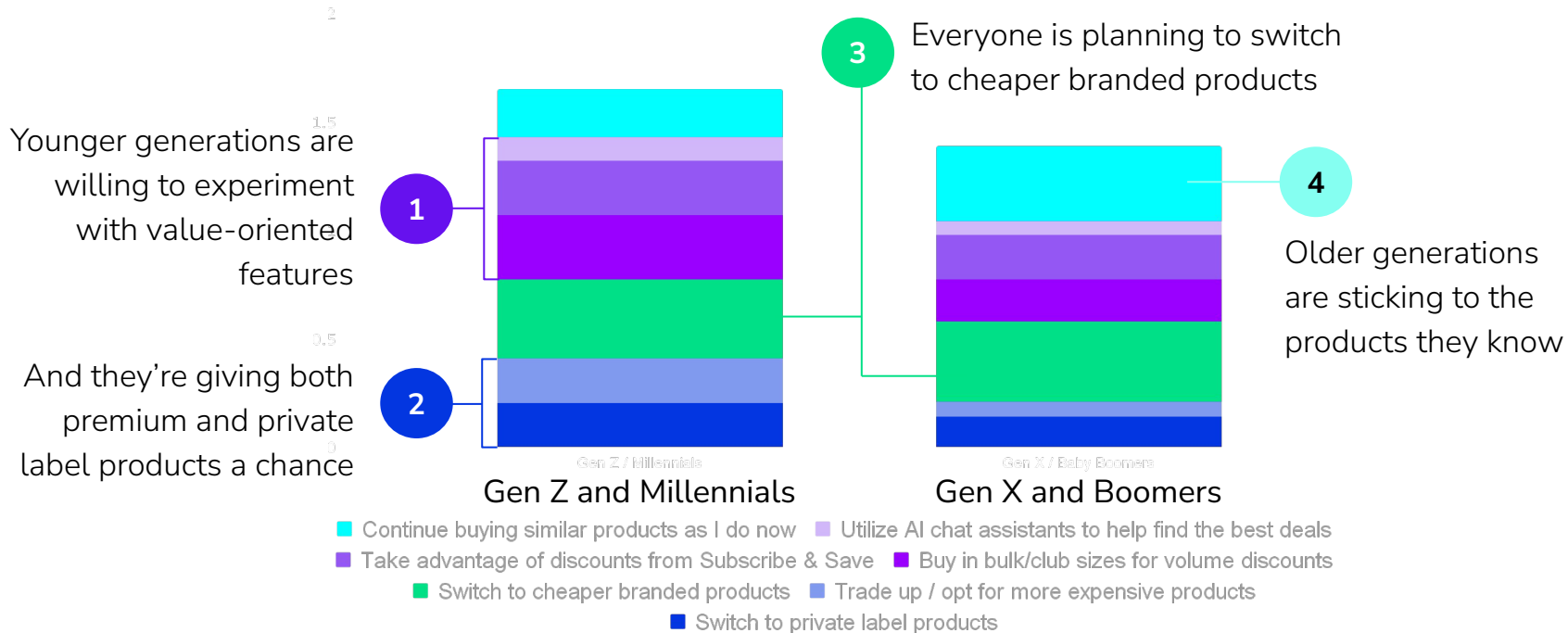
14%

Advertising outside of a  
retailer website / app

20%

13%

# Boomers might be set in their ways, but Gen Z and Millennials are flexible and value minded



# Shoppers rely on retailer websites to validate they're getting the right product at the right price

## 1 in 2

shoppers regularly check retailer websites or apps **before** shopping in-store

## 1 in 2

shoppers regularly check retailer websites or apps **while** shopping in-store

## 1 in 2

shoppers are looking at a **different** retailer website / app to the one they're standing in

# Price comparison in-store is key, but it's not the only thing they're looking at

What are the reasons you consult a website or mobile app WHILE shopping in a physical store?



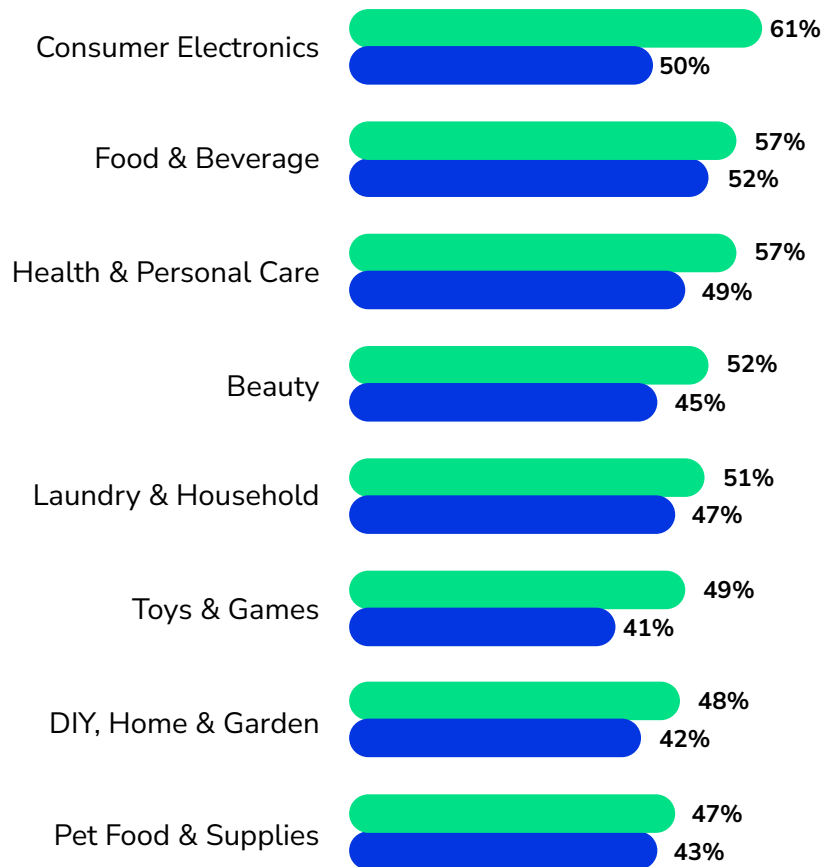
# Retailer site research is prevalent across all categories

Amazon rises to the top for pre-trip planning for Consumer Electronics purchases but Walmart rises to the top for all other categories.

**How often do you consult a retailer's website or app before / while shopping in a physical store?**

● = Before shopping in a physical store

● = While shopping in a physical store





## A WORD FROM THE EXPERTS

In today's retail landscape, being convincing means clearly **telling your brand's differentiation story online so shoppers understand you within 10 seconds** when they glance at search results and digital media.

Brands winning online are focusing on high-traffic, high conversion pages, and are crafting narratives that communicate value beyond just price.

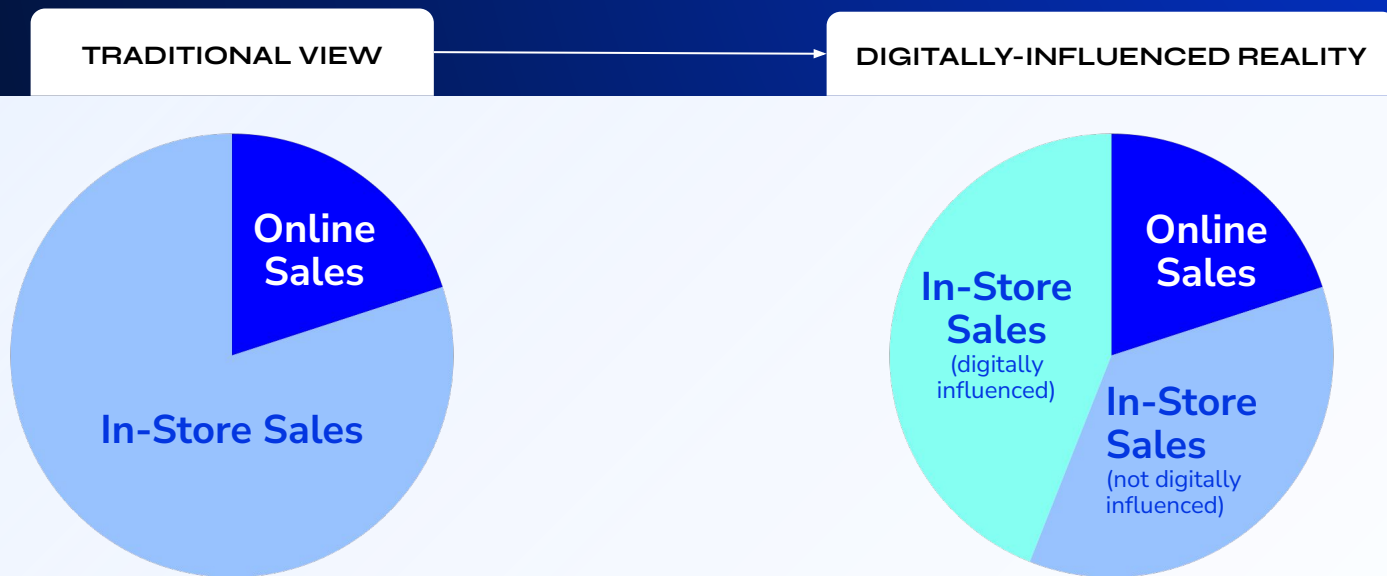


Jamie Dooley  
Vice President, Global Strategic Solutions  
Profitero+

Now that we know that digital plays a bigger role than we thought, how should **leaders** take action?



# Brands winning online are rethinking the investment formula for retail



Invest based on **digitally-influenced** sales, not just **digitally-closed** sales

# Changing investment isn't enough — brand leaders must change ways of working too

## Enable your teams

Leaders must invest in integrated analytics that give sales & marketing a unified view of online and in-store sales, enabling them to address issues and precisely take action to drive omnichannel growth. But data isn't enough: leaders must invest in training to ensure teams know how to take action.

## Create accountability

Leaders must regularly review digital shelf metrics, challenge teams when goals aren't met and re-engineer KPIs so cross-functional teams value digital shelf performance as much as physical. Accountability starts at the top.

## Evolve retailer collaboration

Leaders must insist that retailer Joint Business Plans (JBPs) be conducted with an aim to collaborate on omnichannel strategies and holistic investment across trade, retail media and digital shelf. If 5 minutes of a JBP are reserved for digital commerce, it's not enough.

## Best practices

**Match Search to Shelf:** Ensure your brand's share of Page 1 search meets or exceeds in-store share.

**Shift Trade Spend Smartly:** Reallocate some trade spend to retail media and content for better ROI.

**Dashboard the Right KPIs:** Track search share, digital in-stock and content health—alongside sales, distribution, and promo pricing.

**Be Digital Category Captains:** Treat digital shelf KPIs as strategic and elevate them to retailers in broader category discussions.

# Not a brand exec?

## Here's how you can make an impact:

### RETAILER

#### ASK FOR INSIGHTS

Challenge your suppliers to bring more digital shopping and shelf insights to discussions

#### BE OPEN TO ADVICE

Ask suppliers which retailers are serving the digitally influenced shopper better and why

#### SHARE FREELY

Give suppliers data that will help them better quantify the impact digital investments are having on the whole journey

### AGENCY

#### BREAK SILOS

Challenge clients to think holistically about digital investments; optimising media and digital shelf together

#### BE THE CONNECTOR

Offer to help clients integrate and unify disparate data sets to see the whole omni picture

#### LOSE THE JARGON

Relate complex retail media and digital shelf terms back to familiar brick & mortar concepts

BE DISCOVERABLE

BE CONVINCING

BE VALUABLE

# Profitero+ can help you win the digitally-influenced shopper

- ✓ Ensure you have a healthy digital shelf, across all retailers
- ✓ Create winning content for both PDPs and brand stores; images and content
- ✓ Execute a balanced organic *and* paid search strategy

Join 4,000+ brands that work with Profitero+ as their trusted end-to-end digital commerce solution across 1,400+ retailers in 70+ countries.

Unify your media, content, operations and strategy, today.

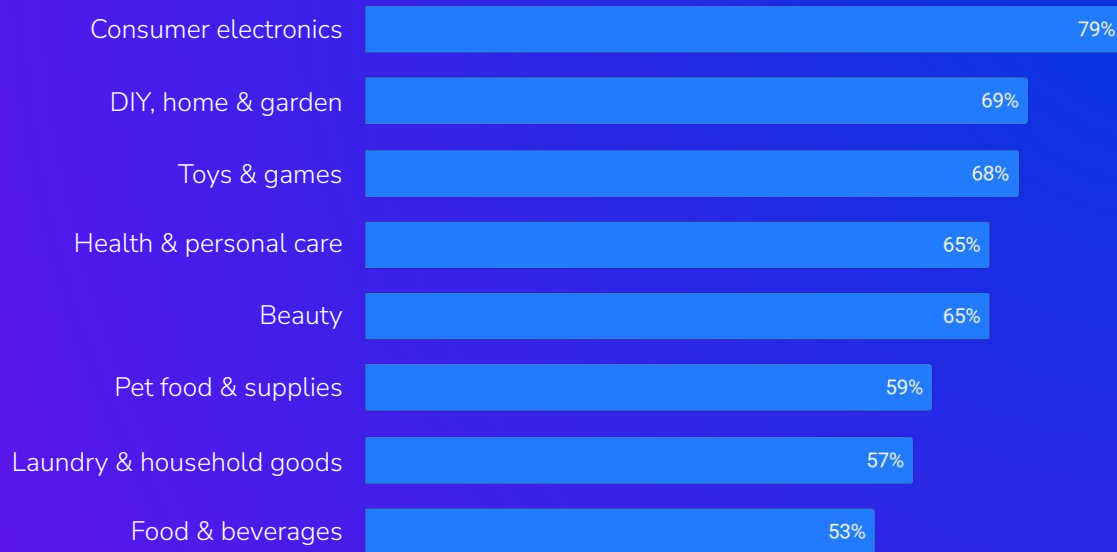
**Contact us**

# Appendix



# Digital touchpoints drive purchases: online and in-store across all categories

% of shoppers who say their purchases are influenced by digital touchpoints



**64%** Averaged across all categories

[Click to return to summary](#)

# Thank you.