

2025 The Digitally Influenced Shopper

Why digital is the doorway to all retail sales



About this study

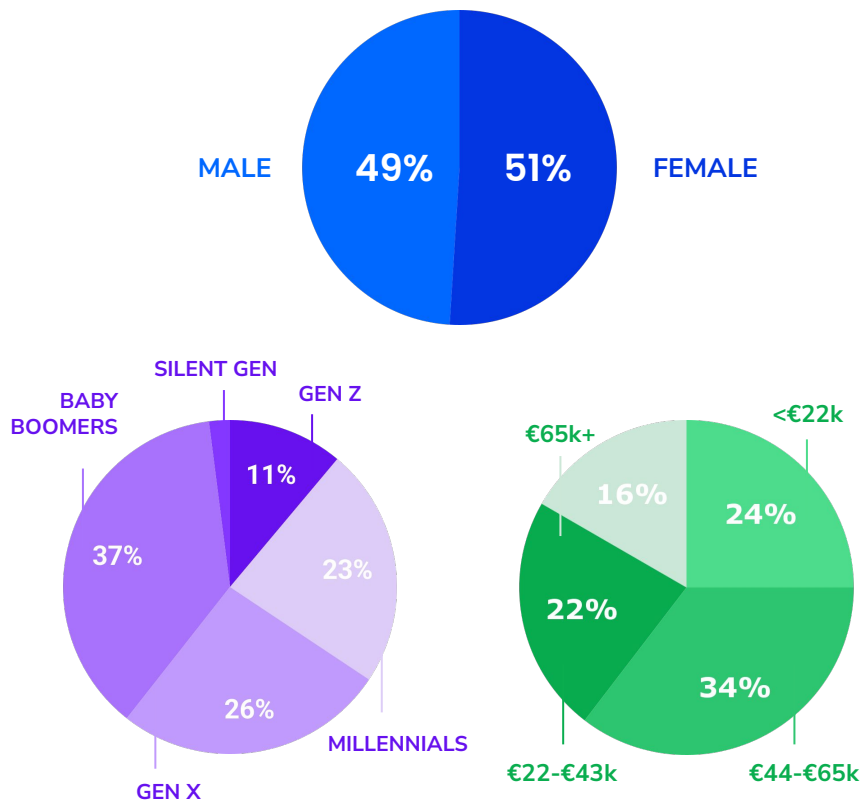
In 2023, Profitero published its first Digitally-Influenced Shopper study to help eCommerce leaders quantify the hidden impact of digital touchpoints—like the digital shelf—on all retail sales, both in-store and online. While other research firms pioneered this type of analysis, it has not been updated 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 Germany-specific insights from a 1,000-person panel.

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

- ◆ We highlight how digitally-influenced shopping behaviours 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 German 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 prioritise 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 more than **2.5X larger** than the traditional eComm sales penetration figures most brands use as a basis for investment.

TRADITIONAL VIEW



ECOMM
PENETRATION **20%***

DIGITALLY-INFLUENCED
REALITY

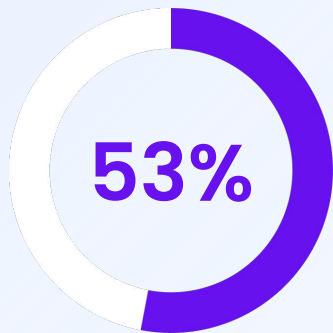
ACTUAL DIGITAL
INFLUENCE **53%**

PART ONE

Decoding the digitally influenced shopper

1

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

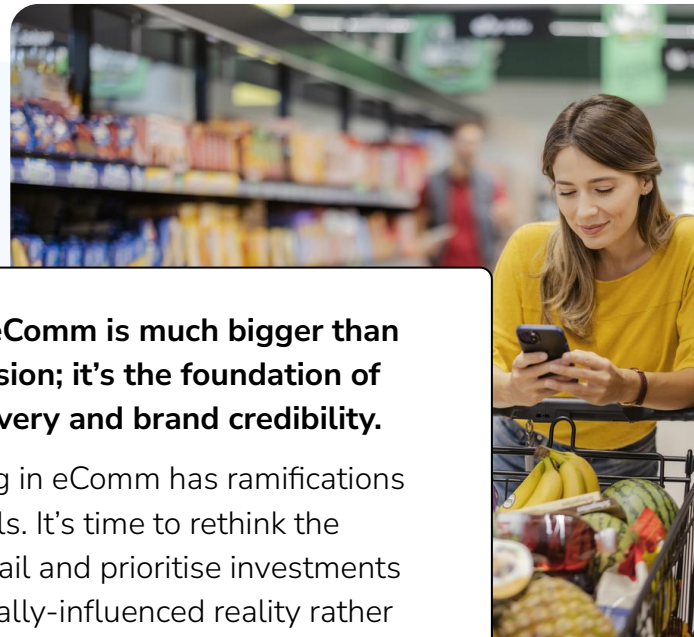


of shoppers are influenced by digital touchpoints*

The level of influence varies by vertical with Electronics leading the pack at 85%

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 prioritise investments based on digitally-influenced reality rather than digitally-closed assumptions.

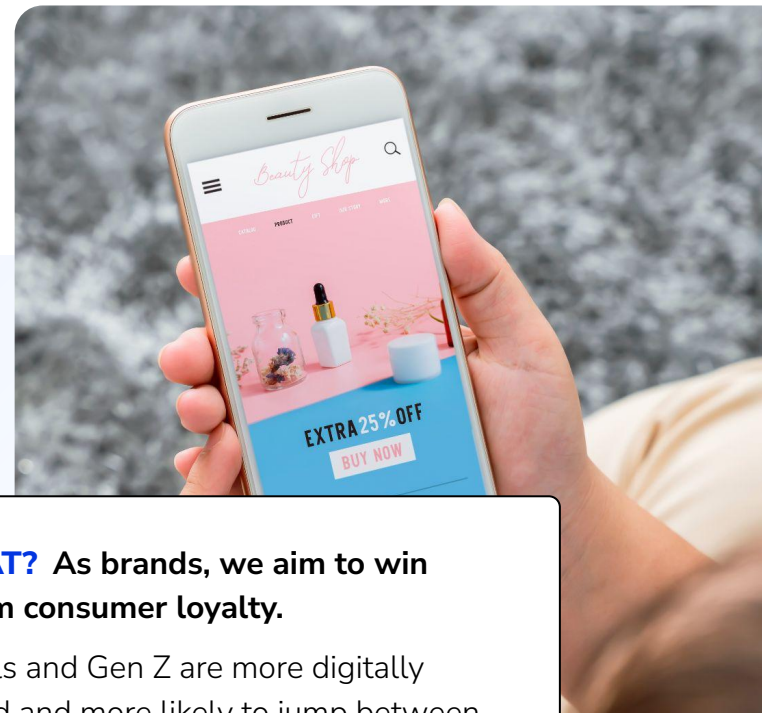
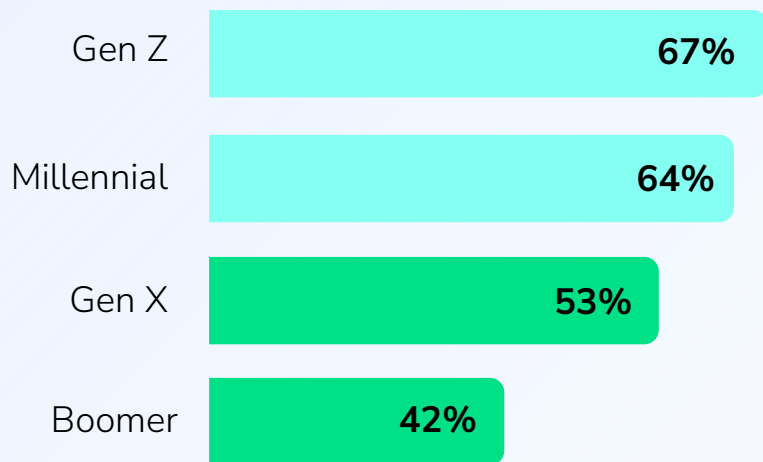


[Click here for full category breakdown](#)

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

44%

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

48%

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

49%

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

57%

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.



5

Reviews are the difference between winning or losing new shoppers

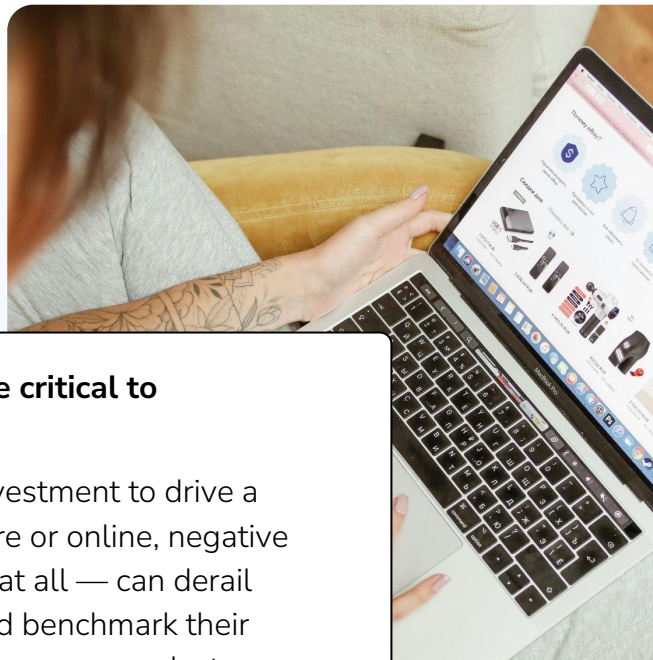


62%

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

Unlocking the door for the digitally influenced shopper

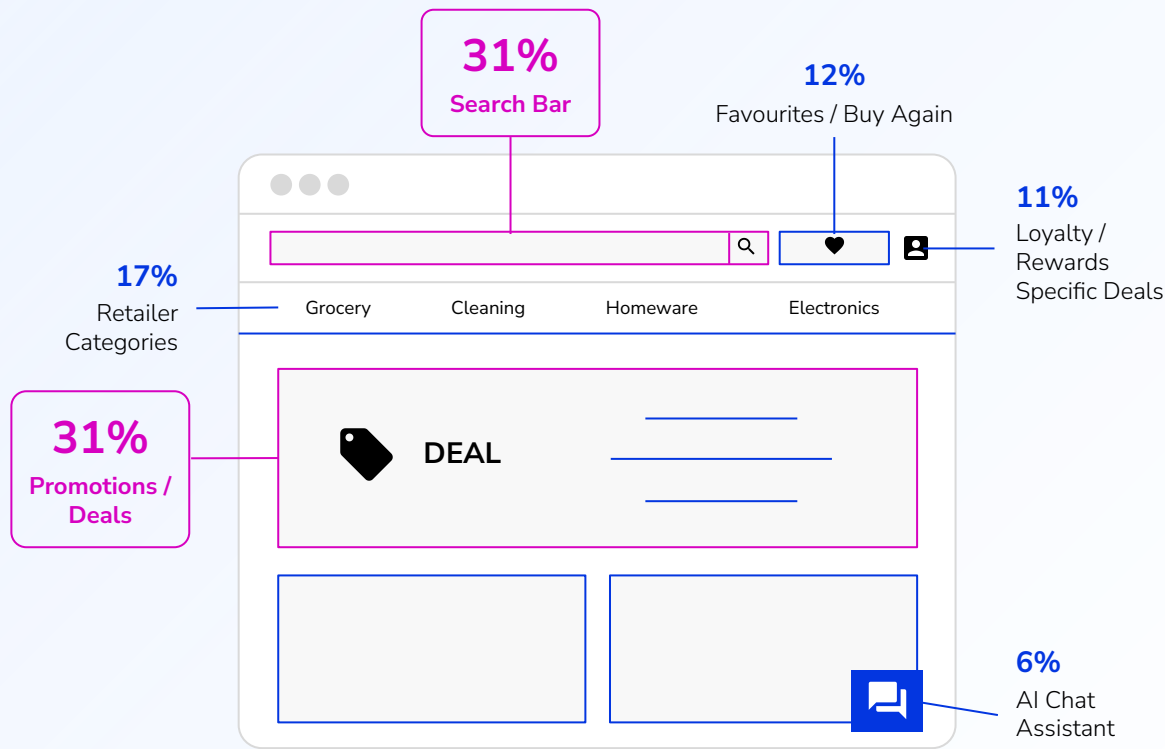
BE DISCOVERABLE

BE CONVINCING

BE VALUABLE

You risk being invisible if you're not winning search

- ◆ Even with the cost of living challenges, consumers are equally likely to start with the search bar as they are promotions
- ◆ This trend holds up across all categories, though shoppers are 14% more likely to navigate through Promotions / deals 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

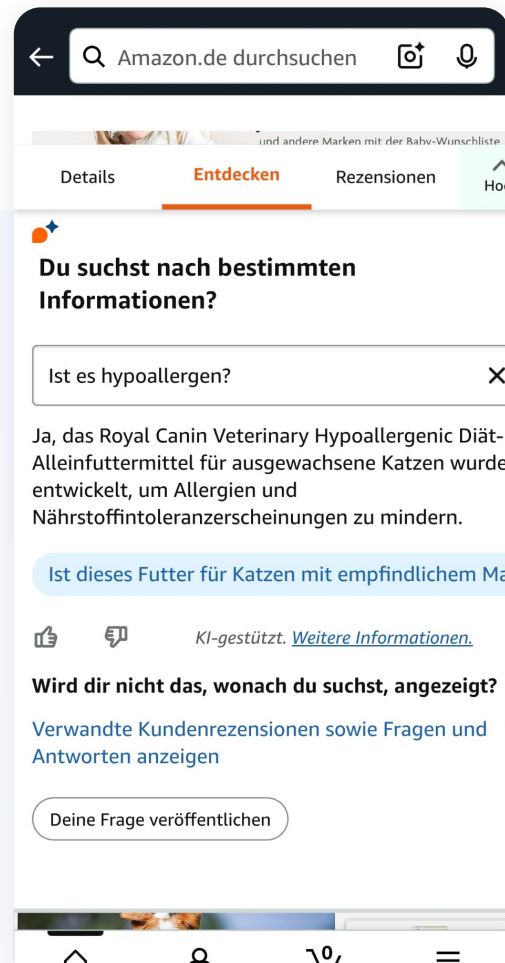
Adoption isn't widespread yet, but AI-led shopping is the next frontier

1 in 16

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

3X

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

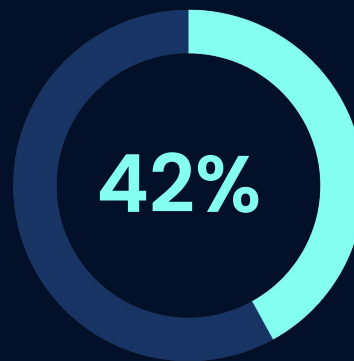


Younger shoppers turn to the digital shelf when they can't find the product on the physical shelf

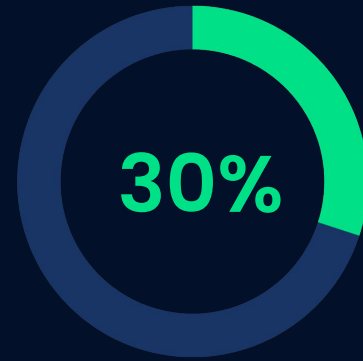
When shopping in-store, what do you do most often if your usual product is out of stock?



Gen Z and Millennials



Gen X and Boomers



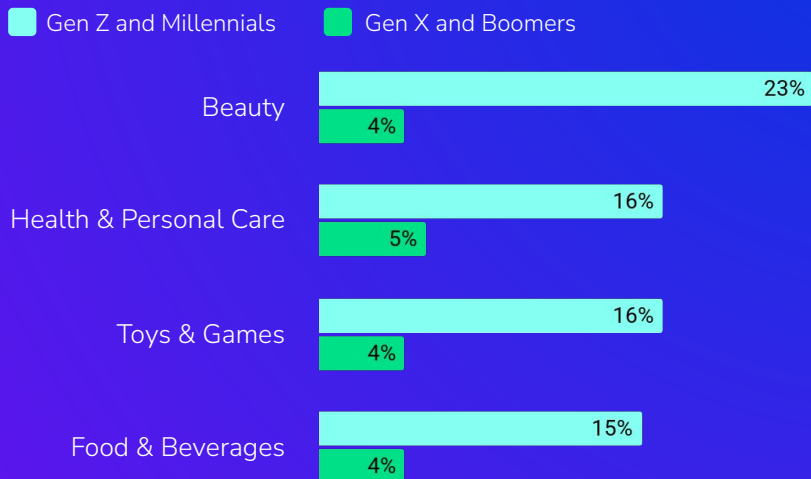
BE DISCOVERABLE

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?



1 in 10 say purchases are swayed by social media influencers

Gen Z and Millennials



Gen X and Boomers

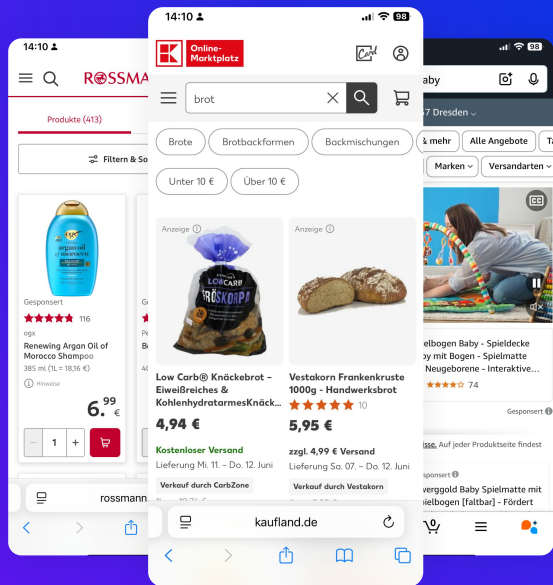


BE DISCOVERABLE

BE CONVINCING

BE VALUABLE

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



4 in 10

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

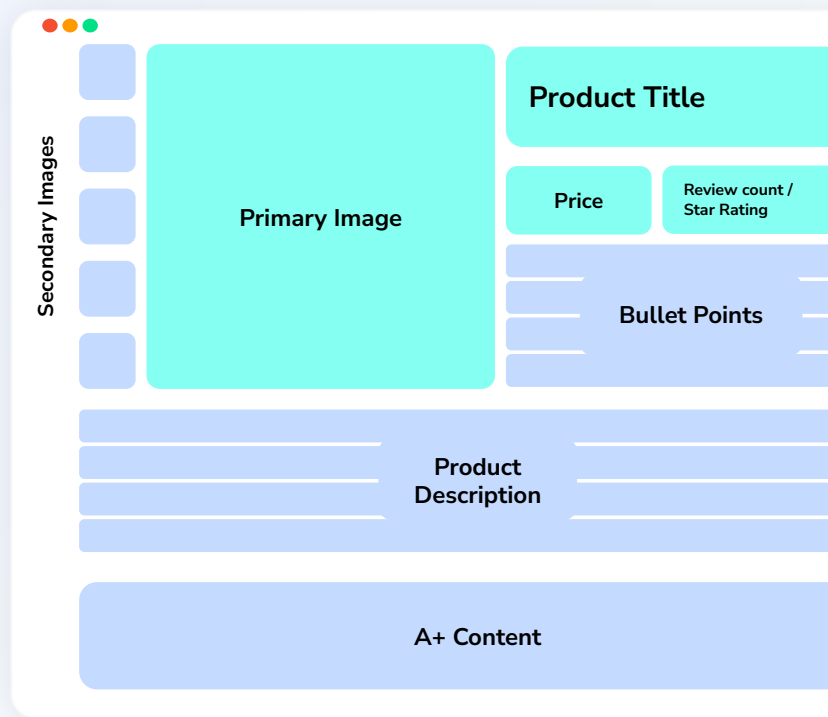
BE VALUABLE

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

1 in 2

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

1 in 3

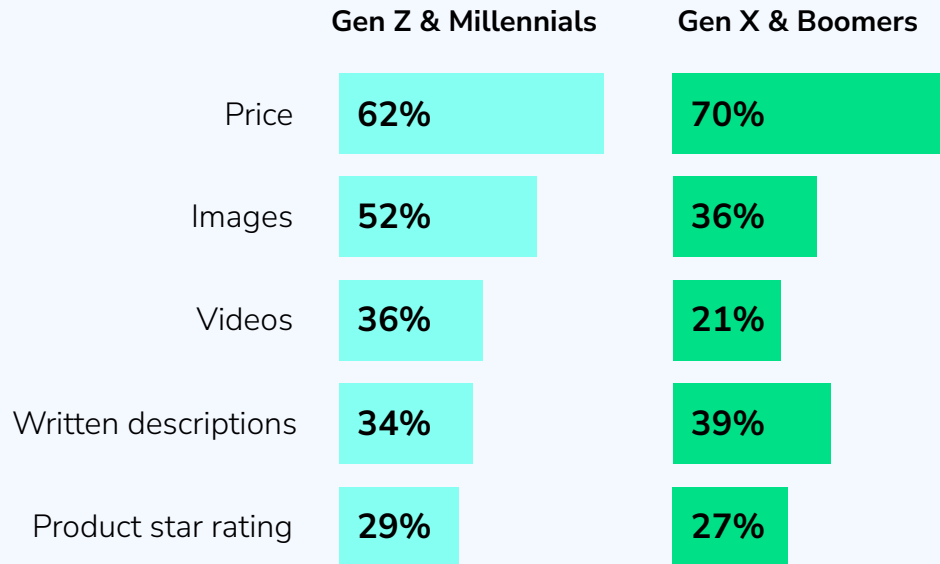
shoppers are influenced by ratings and reviews — fourth biggest after price, past purchases and family/friends

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 advertised 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, emphasise your brand's differentiation in your hero image and title

63%

are adjusting their shopping behaviours to match their budgets

but only...

30%

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

49%

Gen Z and Millennials

61%

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

Advertising outside of a retailer website / app

23%

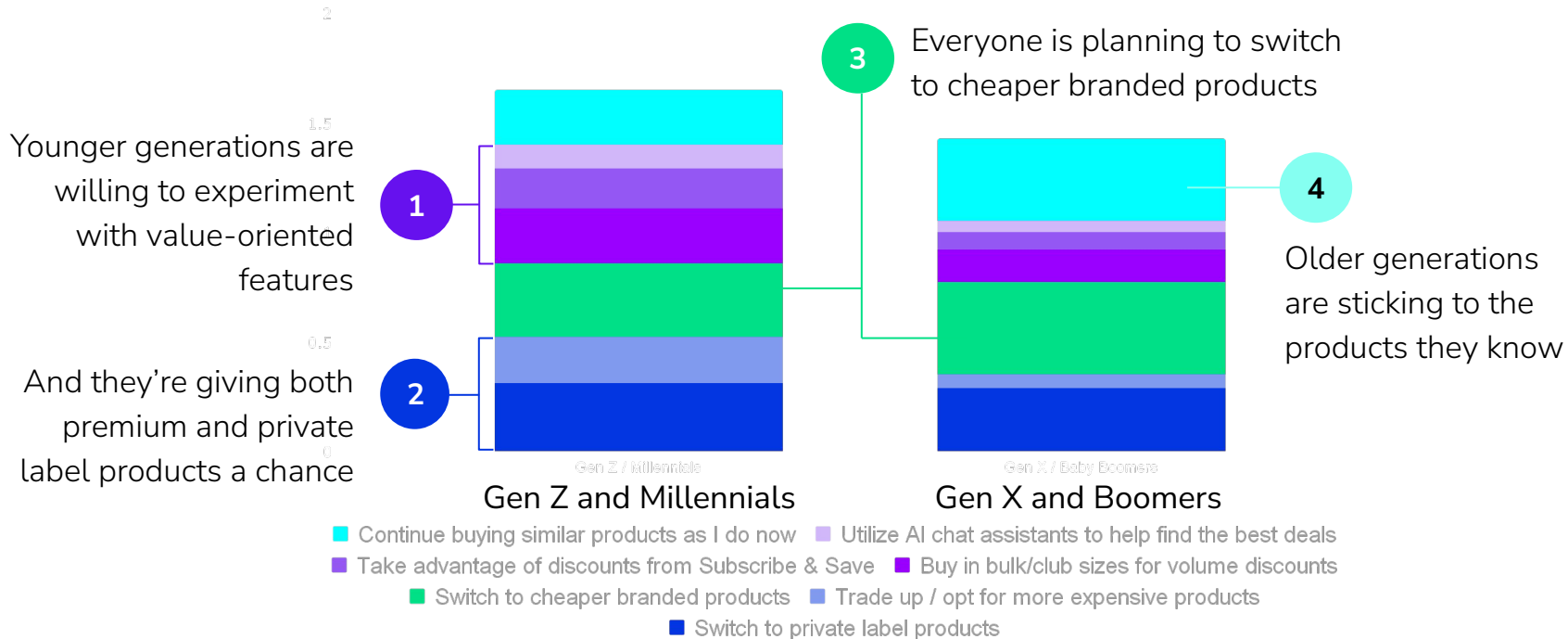
15%

Videos on the product page on a retailer website / app

16%

9%

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

4 in 10

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

1 in 3

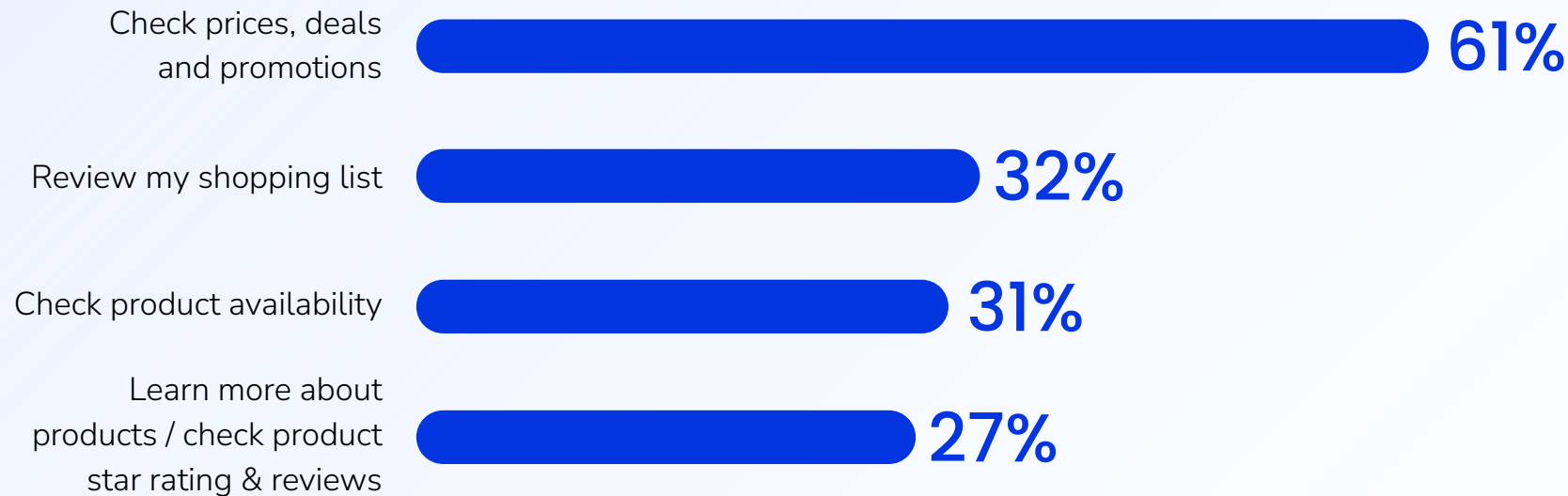
shoppers regularly check retailer websites or apps **while** shopping in-store

4 in 10

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?



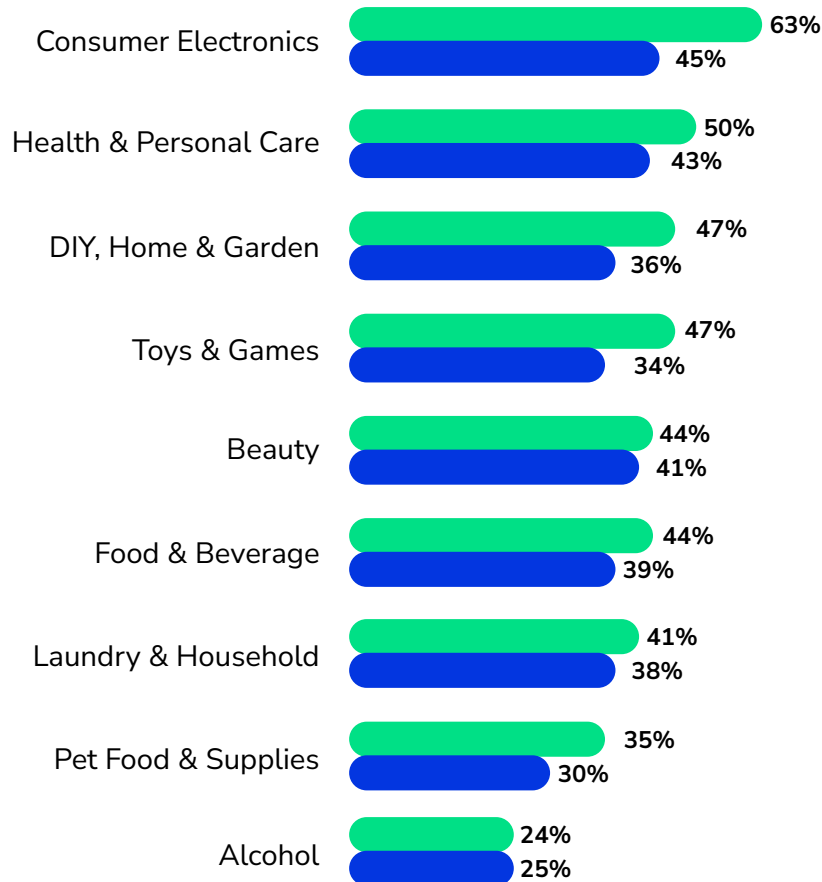
Retailer site research is prevalent across all categories

Amazon rises to the top for pre-trip planning for hardline purchases and Rewe rises to the top for Food, Beverages and Alcohol.

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

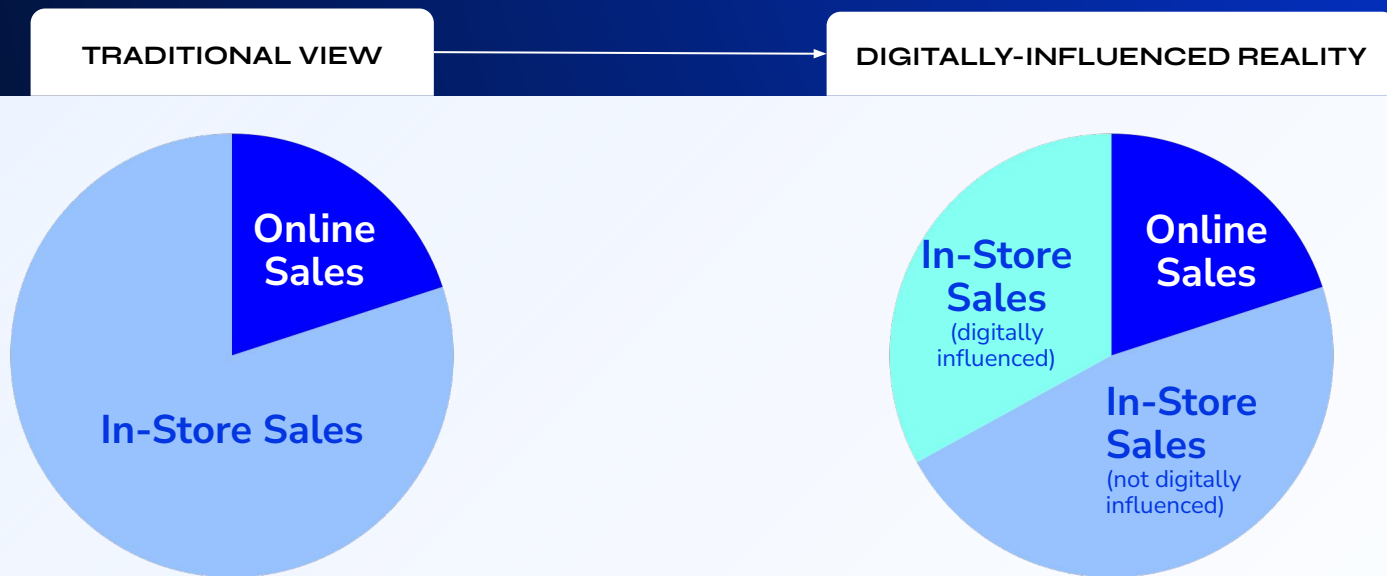
In today's retail landscape, being convincing means clearly **telling your brand's differentiation story online so shoppers understand you within 10 seconds** when they glance at search results and digital media.

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+

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

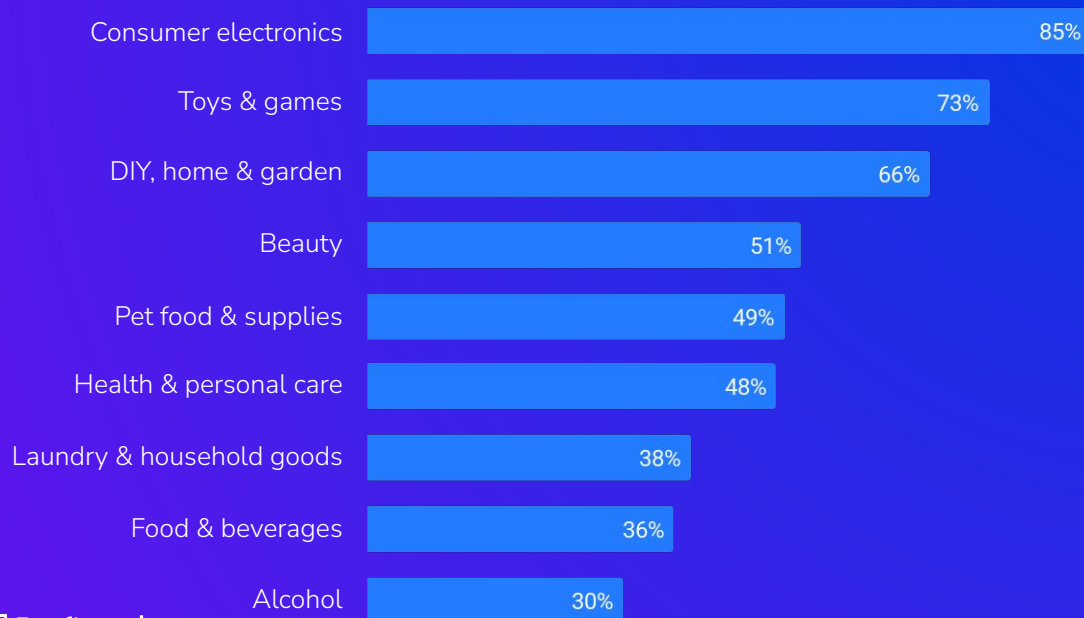
Appendix





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

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



53% Averaged across all categories

[Click to return to summary](#)

Thank you.