Research report

The modern customer journey: Understanding multichannel discovery, research, and purchase patterns

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The path from product discovery to purchase has transformed dramatically. While marketers once mapped linear funnels, today's consumer journey resembles an intricate web of touchpoints spanning digital and physical channels, publisher sites, social platforms, and in-person interactions. This complexity presents both a challenge and an opportunity for brands and retailers.

To better understand these journeys and uncover what makes people decide to buy, EMARKETER and impact.com surveyed more than 1,000 US adults. **This report explores what drives customers to buy and how they arrive at those decisions, revealing several strategic takeaways.**

Key business implications:

- **The discovery-to-purchase gap.** Our research shows that while 69.3% of consumers discover new products weekly, converting these discoveries to sales requires navigating an increasingly complex path. The critical finding is that consumers typically engage with a brand at least three times across different channels before making a purchase decision. For marketers, this multitouch reality requires sophisticated cross-channel strategies.
- **The attribution challenge.** With more than 80% of retail dollars still spent in-store, but a lot of research happening online, traditional attribution models are failing to capture the full customer journey. This disconnect is costing brands valuable insights and potentially misaligning marketing investments. The research reveals that 22.8% of customers research products five or more times before buying, making accurate attribution even more crucial.
- **The channel effectiveness paradox.** While Amazon leads as the primary product search destination (for 56% of consumers, per Jungle Scout), our research reveals that discovery and research happen across a diverse ecosystem of channels. Search engines, retailer websites, and social platforms all play crucial roles in early stage product discovery and consideration. This fragmentation requires marketers to maintain visibility across multiple touchpoints while understanding each channel's unique role in the purchase journey.
- **The demographic divide.** Consumer behavior shows marked differences across age and income segments, particularly in research patterns. High-income consumers (earning $250,000 or more) research products five or more times before purchase at significantly higher rates (60.2%) than other income brackets. Additionally, consumers between 44-59 show a high likelihood (67.3%) of discovering new high-consideration products, suggesting the need for sophisticated segmentation strategies.

This report provides a comprehensive framework for understanding and acting on these trends, helping brands build effective multichannel strategies that acknowledge the complex reality of modern shopping behavior while maintaining clear attribution and ROI measurement.

Some of the key discoveries are:

69.3%

Most shoppers (69.3%) discover new products at least once a week.

3x

After discovery, consumers usually research products at least three separate times before deciding to buy.

6 in 10

At least six in 10 consumers buy recently discovered products across all product types.

In this report, we define product types as follows:

High-price/high-consideration products: Expensive, carefully considered products like luxury cars, laptops, and custom-made furniture

High-price/low-consideration products: Expensive, casually considered products like premium brand clothing, fine-dining experiences, and concert tickets

Low-price/high-consideration products: Affordable, carefully considered products like mascara, skincare serums, and kitchen appliances

Low-price/low-consideration products: Affordable, casually considered products like snacks or stationery

"The proliferation of digital media and ecommerce platforms has made the customer journey infinitely more complex," said EMARKETER senior analyst Blake Droesch. "Historically, there were only so many ways for shoppers to discover, research, and purchase new products. Today, the sheer level of media consumption happening across many different fragmented channels makes attribution difficult to track, particularly **when 80% of retail sales are still coming from physical stores.**"

To help navigate the survey results, we've organized the insights in this report along with stops in today's buyer's journey.

Discovery: Most consumers discover new products at least once per week.

Consideration: Consumers are likely to research products multiple times across multiple platforms, including brand websites, third-party publishers, social media, and through word-of-mouth.

Purchase: Six in 10 consumers often purchase newly discovered products, but purchase does not always occur in the same channel where they first saw the product.

Attribution: This winding, ongoing customer journey makes attribution difficult. That makes efficiently allocating marketing spend just as difficult.

Mapping the discovery phase: Where consumers begin their journey

Product discovery has evolved into a continuous, multichannel process that defies traditional marketing frameworks. **Our research reveals that 69.3% of consumers discover new products at least weekly**, highlighting the constant opportunity—and challenge—for brands to capture attention.

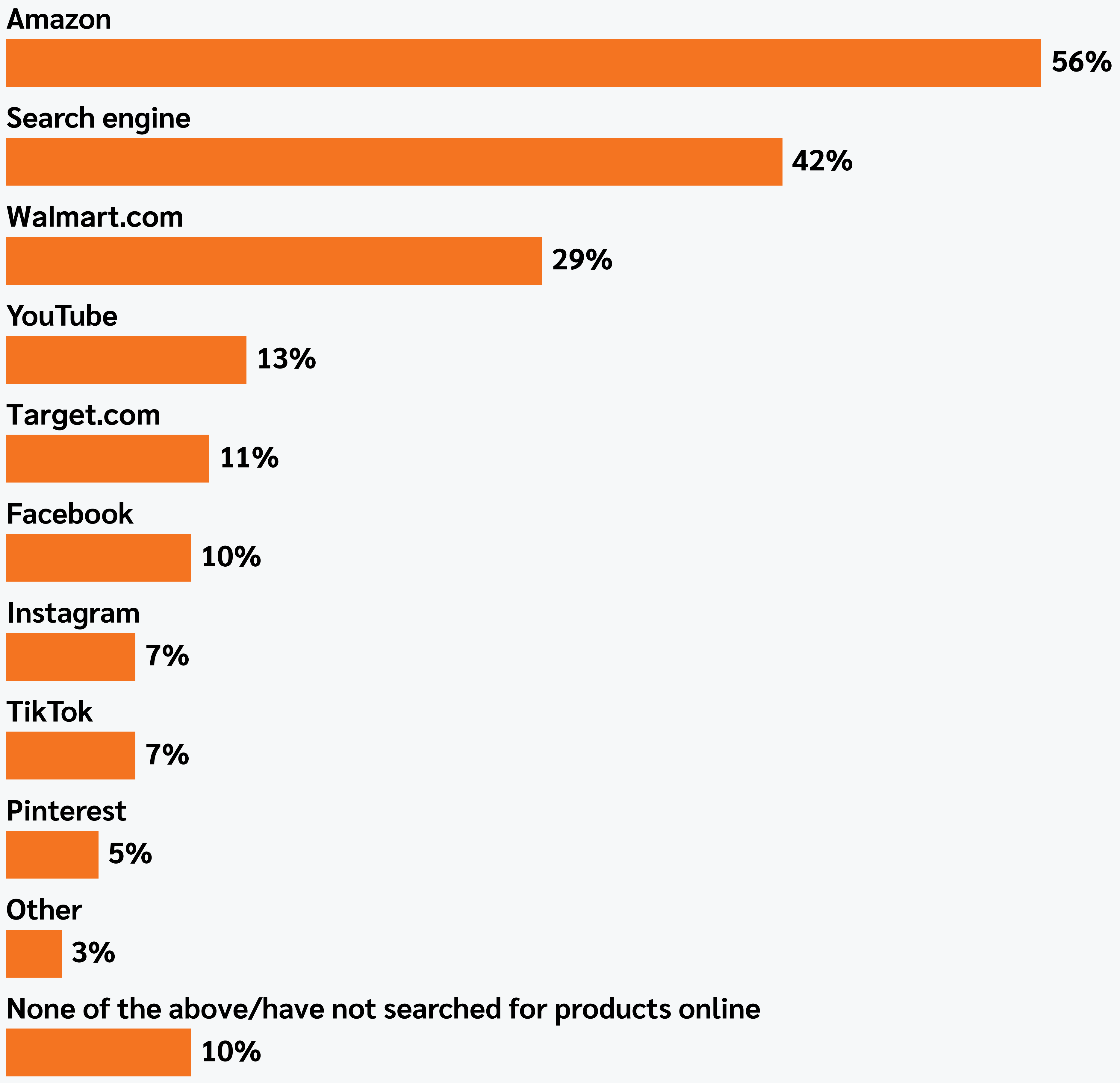
Channel dynamics: The new product search outlook

According to a February 2024 study from Jungle Scout, **Amazon dominates as the starting point for product discovery,** with 56% of consumers beginning their shopping journey on the platform. **The discovery landscape extends well beyond Amazon, with search engines capturing 42% of initial product searches**, while Walmart.com (29%) maintains a strong presence. Digital video and social platforms—including YouTube (13%), Facebook (10%), Instagram (7%), TikTok (7%), and Pinterest (5%)—play increasingly important roles in product discovery. Notably, at least 10.0% of consumers start their ecommerce journeys via search engines, Walmart, YouTube, Target, or Facebook, while 3% use other channels.

“**The modern consumer can discover new products virtually anywhere**, be it social media and digital video or through traditional means like word-of-mouth,” noted EMARKETER senior analyst Blake Droesch. “While in-store discovery often leads to immediate purchase due to high shopping intent, **most shoppers, particularly online browsers, engage with multiple touchpoints before making a final decision.**”

Where US consumers start their search when online shopping, Feb 2024

% of respondents



Note: ages 18+; 49% of respondents were ages 59+; respondents could select multiple options
Source: Jungle Scout, "Consumer Trends Report: Q1 2024," March 26, 2024
EMARKETER (285168)

Demographics of discovery: Understanding age-based behaviors

The 44-59 age group emerges as particularly active in product discovery, especially for premium items.

This cohort shows:

- **67.3% likelihood** of discovering high-price/high-consideration products
- **Strong discovery rates** across all product types
- Significantly **higher probability** of conducting **post-discovery research**

Source: EMARKETER and impact.com "Shopper Journey Survey," November 2024
n=1,020

Shopping personality insights: Habitual vs. experimental consumers

Our research identifies two distinct shopping personalities:

1. Habitual shoppers: Frequently purchase the same products from the same stores, either online or in-store

2. Experimental shoppers: Frequently try new products and new stores, either online or in-store

There is not a significant difference in purchasing habits of newly discovered products between habitual and experimental shoppers. Despite sticking with shopping routines, habitual shoppers still discover new products. Notably, 41.7% of consumers exhibit both habitual and experimental behaviors, suggesting that the line between shopping personalities is fluid.

Habitual shoppers are open to finding and discovering new products

	Habitual shoppers (39.3%)	Experimental shoppers (19.0%)
More likely to discover new products several times per day	✓	
More likely to research new products	✓	
More likely to visit a store to research new products	✓	
More likely to engage with influencer content		✓
Purchase newly discovered products	✓	✓

Note: 41.7% are both habitual and experimental shoppers

Marketing implications:

Our data suggests that **successful discovery strategies must span multiple channels** while acknowledging that different consumer segments may enter the purchase journey through distinct touchpoints. With both habitual and experimental shoppers showing similar purchase rates for newly discovered products, marketers should target both audiences, as the majority of both groups often purchase newly discovered products.

The consideration phase: Understanding modern research patterns

The path from discovery to purchase involves an intricate consideration phase, where consumers engage with multiple touchpoints across digital and physical channels. Our research shows that **most consumers research products at least three separate times before deciding to buy, consulting multiple sources** across websites, social media networks, in-store experiences, and word-of-mouth channels. For brands, success requires maintaining visibility across all these areas to effectively drive consumers toward purchase—particularly since consumers bounce between different platforms throughout their decision journey.

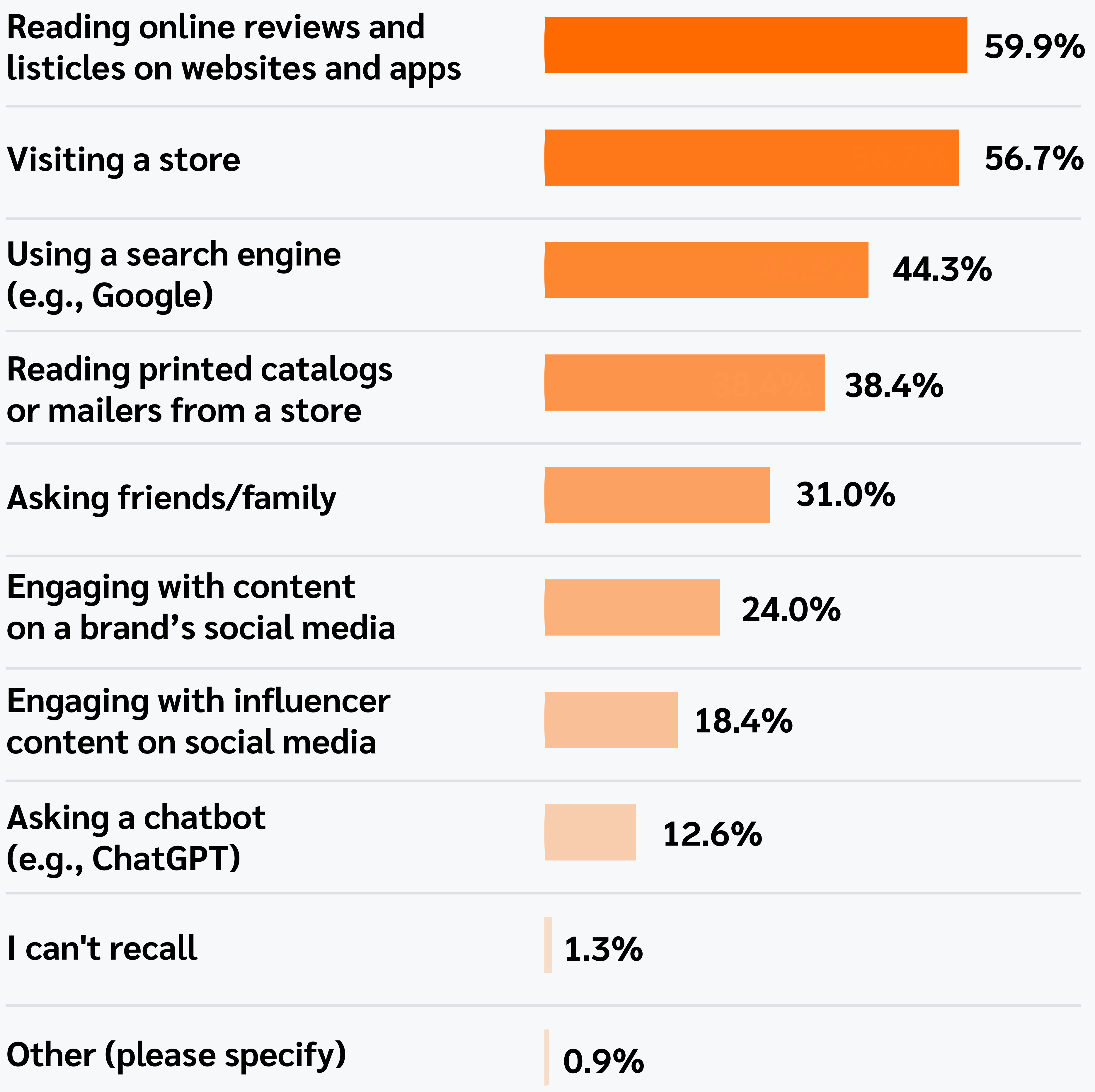
Research dynamics

Consumers demonstrate clear preferences in how they evaluate potential purchases, **with online reviews and listicles leading the way (59.9%).** But shoppers consult many other resources. This diverse research ecosystem reflects how **consumers gather information from multiple sources before making buying decisions:**

1. Digital channels

- **Search engines (44.3%)** serve as a primary research tool.
- **Branded social media (24.0%)** provides direct brand engagement.
- **Influencer content (18.4%)** is powerful for discovery, but consumers engage with influencer content more organically than structured research channels, making it more effective for initial awareness than detailed research.
- **Chatbots (12.6%)** offer immediate information access.

What type of research do you conduct to learn about new products? Select all that apply.



Source: EMARKETER and impact.com "Shopper Journey Survey," November 2024
n=1,020

2. Traditional channels

- **Printed catalogs and mailers (38.4%)** remain significant research tools.
- **Friends' and family's opinions (31.0%)** provide trusted recommendations.

The prevalence of multiple research channels underscores how consumers seek diverse perspectives before making purchase decisions. This multitouch research pattern means brands must maintain a consistent presence and messaging across all channels to effectively influence purchase decisions.

3. Income-driven research patterns

Income levels significantly impact research behavior, particularly among high-earning consumers:

60.2% of consumers earning $250,000+ research products five or more times before purchasing—markedly higher than any other income bracket

- Higher-income consumers show **stronger preference for certain digital tools:**
  - More likely to engage with **chatbots**
  - Higher utilization of **influencer content** for research
- Lower-income consumers find **in-store research experiences** more helpful

How do shopping habits impact consideration?

Frequent shoppers are more likely to:	Occasional shoppers are more likely to:
Care about influencer/ creator endorsements	Find search engines helpful
Care about packaging	Listen to family/friend recommendations

Frequent shoppers discover new items several times a day. Occasional shoppers discover new items every six months or more.

Source: EMARKETER and impact.com "Shopper Journey Survey," November 2024
n=1,020

As seen on TV?

Products being featured in movies or on TV don't really matter for most people—except for those who make over $150,000.

4. Generational research preferences

Age significantly influences how consumers approach product research:

Young consumers (ages 18-27):

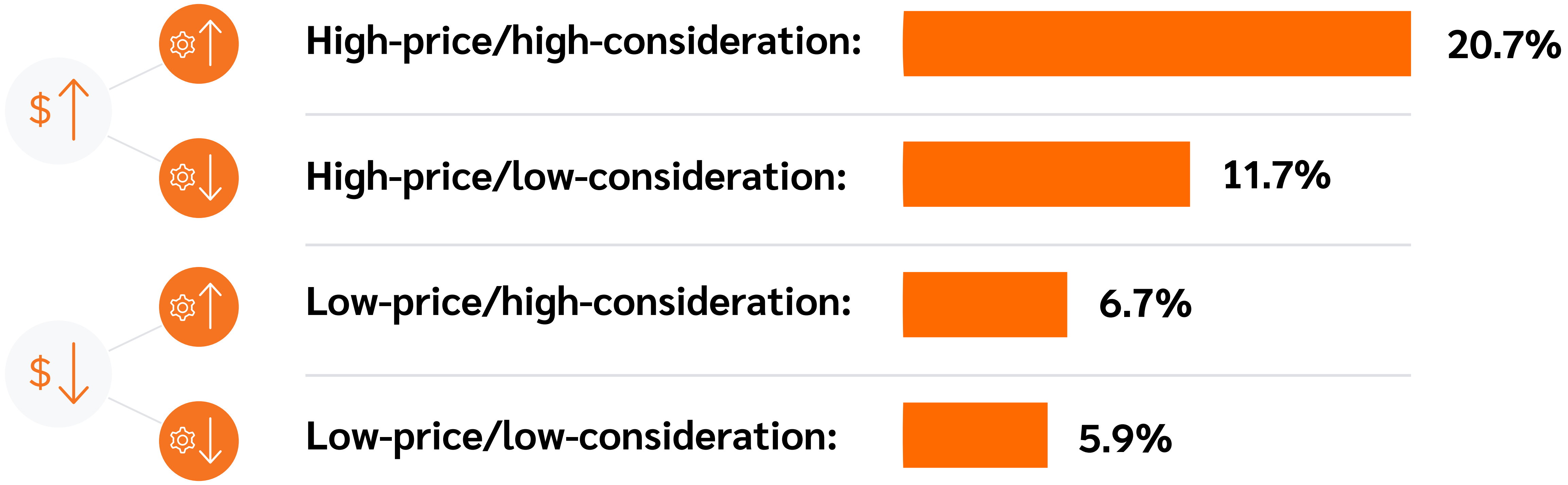
- **Less influenced by family/friend** recommendations than other age groups
- Prioritize:
  - **Discounts**
  - Positive online **ratings and reviews**
  - Product **quality**

Older consumers (60+):

- Significantly **less likely to value influencer endorsements**
- Prioritize:
  - **Discounts**
  - Positive online **ratings and reviews**
  - Product **quality**
  - **Family/friend** recommendations

5. Research intensity by product type

The depth and duration of research correlate strongly with price point.
Percentage of consumers spending more than two weeks researching:



Source: EMARKETER and impact.com "Shopper Journey Survey," November 2024
n=1,020

Marketing implications:

Our research suggests that consideration pathways vary significantly based on consumer demographics and price point. Successful brands must maintain visibility across multiple research channels while tailoring their approach to specific audience segments and product categories. Most importantly, brands need to recognize that consumers typically conduct **research at least three separate times before making a purchase decision,** making consistent messaging across channels crucial for conversion.

The purchase phase: Converting research into revenue

The final stage of the customer journey—the purchase decision—represents the crucial moment where effective discovery and consideration strategies convert to sales. **While at least 60.0% of consumers regularly purchase newly discovered items,** brands face a significant challenge: With consumers constantly discovering new products, how do you ensure they choose yours? This challenge is complicated by the fact that **consideration and purchase often occur in different channels, requiring brands to enable purchasing wherever consumers prefer to buy**—whether in-store, on brand websites, through third-party platforms, or via social media.

Driving purchase decisions: The value-quality matrix

Price and value emerge as the dominant factors influencing purchase decisions:

- **Discounts serve as the primary purchase driver**, with 62.3% of consumers citing them as a key consideration.
- **Product quality (34.7%) and price (20.0%)** form the foundation of most purchase decisions.
- **Higher-income consumers prioritize quality**, while lower-income consumers focus more on price.

"This might be the one area where nearly all shoppers are the same," noted EMARKETER's Droesch. "It's sort of a universal truth that price and quality are the top consideration factors for shoppers, and this will always be the case. There are many other factors that drive consumers to buy, and they likely have more influence than some consumers give credit for, but nothing trumps bang for your buck."

Beyond price and quality: Secondary purchase drivers

While price and quality lead purchase decisions, several other factors influence consumer choice:

Customer reviews (10.7%):
Social proof remains crucial

Brand reputation (8.9%):
Trust influences purchase decisions

Product availability (8.3%):
Convenience matters

Channel dynamics: The research-purchase connection

Understanding where consumers research and ultimately buy reveals important patterns across product categories:

Where do consumers research and buy?

The most common place to research and buy for each product type:

	High-price	Low-price
High-consideration	Research online, buy online	Research online, buy online
Low-consideration	Research online, buy in-store	Research online, buy online

Source: EMARKETER and impact.com "Shopper Journey Survey," November 2024
n=1,020

This pattern reveals a crucial insight about modern shopping behavior, as Droesch explained. "There are simply far more resources online than in-store during the consideration phase. Even while shopping in stores, consumers use their phones to compare prices and read reviews. Most people, especially younger consumers, **would rather use their phones to look up product details than speak with a store associate."**

Marketing implications:

Our research reveals that success in **the purchase phase requires a sophisticated multichannel approach.** Brands must enable seamless purchasing across all channels while recognizing that transactions may occur in places other than initial discovery or research. Clear pricing strategy and value propositions need consistent communication across touchpoints, as these remain universal drivers regardless of channel. The increasing prevalence of mobile research during in-store shopping further emphasizes the **need for brands to optimize their digital presence to support both online and offline purchase decisions.**

The attribution challenge: Understanding and overcoming measurement hurdles

The modern customer journey presents a fundamental attribution challenge for marketers. While brands aspire to closed-loop, direct-attribution measurement, the reality is far more complex:

Current state of attribution

- **Attribution and measurement ranks as the top investment priority** for 2025 among US brand and agency marketers (InMarket)
- **22.8%** of customers **research products five or more times** before buying (EMARKETER, impact.com)
- **Over 3 in 10** shoppers research **online but buy in-store** (EMARKETER, impact.com)
- **83.8% of retail dollars** are **spent in-store** (EMARKETER forecast, October 2024)

"**Attribution remains a challenge to digital marketers**, particularly in categories like CPG [consumer packaged goods] where most sales occur at physical retail," said EMARKETER's Droesch. "If someone discovers a new product through an influencer's post on TikTok but buys it at a Walmart, it can still be very difficult to attribute that sale to that particular marketing activation."

Winning the multichannel customer journey: A strategic guide for marketers

Today's path to purchase is intricate and non-linear, with consumers weaving between digital and physical touchpoints as they discover, research, and ultimately buy products. Our research reveals that **success requires a sophisticated approach** that addresses both the broader customer journey and specific channel dynamics.

Build a comprehensive digital ecosystem

The modern shopping journey typically involves three-plus research sessions across multiple platforms. **To succeed, brands must:**

- **Create consistent, high-quality product content** optimized for each major platform
- Develop **mobile-first experiences** that support in-store research behaviors
- Ensure **pricing and availability** information stays synchronized across channels
- Enable easy access to **reviews, ratings, and comparison tools**

Quality and value as universal drivers

Our research clearly shows that quality and value remain the top purchase drivers across all demographics. However, how you demonstrate these elements should vary by product type and consideration level:

For high-consideration products:

- **Build detailed educational content** and buying guides
- Provide robust **comparison tools** and specifications
- Enable **expert consultation** options
- **Develop content** that supports multiple research sessions

For low-consideration products:

- **Streamline** the path to purchase
- Emphasize **convenience and availability**
- **Deploy strategic discounting** while protecting margins
- Consider **subscription options** where appropriate

Navigating attribution challenges

While perfect attribution remains elusive, marketers can build a clearer picture of the purchase journey by:

- **Implementing multitouch attribution models** that capture both online and offline touchpoints
- **Tracking consumer behaviors** that may lead to conversion, like store locator usage and wishlist additions
- **Using customer data platforms** to build unified customer views
- **Measuring the impact of harder-to-track channels** through probabilistic modeling

While the path to purchase has become more complex, the fundamentals haven't changed: Consumers still want quality products at a fair value, presented in ways that make it easy to buy. By focusing on these core needs while adapting to new shopping behaviors, marketers can successfully navigate this evolving landscape and drive growth in an increasingly competitive market.

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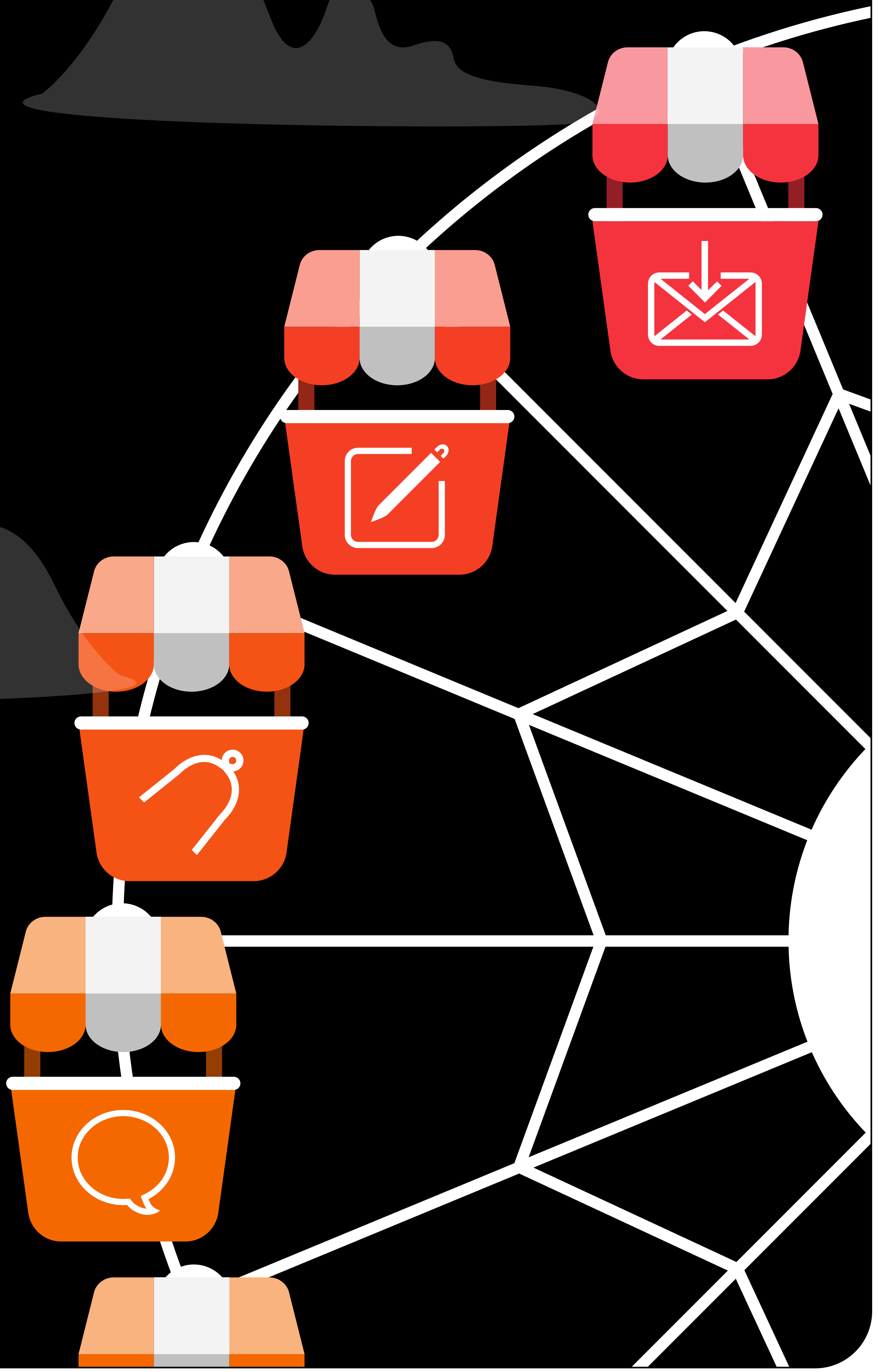
Simplify attribution and unify your strategy

Multi-touchpoint journeys create challenges—from tracking attribution to ensuring brand consistency across channels. Without the right strategy, it's easy to lose clarity and impact.

Integrating affiliate and influencer marketing provides the solution. Uniting these channels drives precise attribution, improves cross-channel visibility, and aligns messaging seamlessly.

Cut through the complexity.

Get key insights now



About the survey

This survey of 17 questions was developed by impact.com and fielded by EMARKETER during October and November 2024.

We surveyed 1,020 US consumers to assess their discovery, consideration, and purchasing habits. Data was broken out based on age group (18-27; 28-43; 44-59; 60+), income ($0-$24,999; $25,000-$34,999; $35,000-$49,999; $50,000-$74,999; $75,000-$99,999; $100,000-$149,999; $150,000-$199,999; $200,000-$249,999; $250,000+), product discovery frequency, and shopping habits (habitual vs. experimental).

About this report

Research for this report was compiled by members of the EMARKETER Studio team in partnership with impact.com, using reports, forecasts, and research by EMARKETER on retail, consumer habits, and marketing.

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