FOR BUSINESS

THE NEW RULES OF RETAIL GROWTH

How today's shoppers discover, evaluate, and buy—and what the highest-performing retail, apparel, & beauty brands are doing differently.



EXECUTIVE SUMMARY

Retail Growth Is Becoming More Complex

Retail marketers aren't competing in the same marketplace they were just a few years ago. Consumers still want value, but they're making purchase decisions differently—and that has changed what drives growth.

4 IN 10

Consumers are deal-driven or cost-conscious.[1]

UP TO 40%

of brand value comes from factors beyond price, including:

- Product quality
- Convenience
- Customer service
- Shopping experience[1]

$5T+

Gen Z and Millennials now represent more than **$5 trillion in annual spending power**, making them one of retail's most influential consumer groups.[2]

For marketers, the challenge isn't simply reaching more shoppers. **It's understanding how changing consumer expectations are reshaping the path to purchase.**

What You'll Learn

Why today's shoppers spend more time **researching and validating purchases** before they buy.

How modern purchase journeys create **blind spots for marketers relying on last-click attribution**.

How to evaluate whether your media budget aligns with **where purchase decisions are actually being influenced**.

A Five-Minute Media Plan Pressure Test to uncover gaps and identify one or two practical media tests to run next.



THE PURCHASE JOURNEY HAS BECOME MORE DELIBERATE

Today's shoppers build confidence over time—not in a single moment.

Consumers no longer move directly from product discovery to purchase. Before buying, they research products, compare alternatives, read reviews, and validate decisions across multiple sources. This behavior is especially common among younger shoppers.

Snap-commissioned research with NRG shows:

81%
of Snapchatters say they get ideas on what to shop for from **social channels**.[3]

85%
say they discover new products and brands through **social ads and content**.[3]



The Modern Purchase Journey

How today's shoppers move from discovery to purchase.

DISCOVER

Channels:
Social Media, Friends

Content / Activity:
Creator Content, Product Recommendations

RESEARCH

Channels:
Search, AI Tools, Retailer Sites & Blogs

Content / Activity:
Product Information, Buying Guides

COMPARE

Channels:
Search, Retailer Sites, Social Media

Content / Activity:
Compare Products, Check Pricing, Explore Alternatives

BUILD CONFIDENCE

Channels:
Social Media, Retailer Sites, Review Sites

Content / Activity:
Reviews & Ratings, Expert Opinions, Customer Testimonials

BUY

Channels:
Online, In-Store

Content / Activity:
Purchase

Consumers are also turning to **new tools** throughout the evaluation process. According to IBM and the National Retail Federation:

41%
of consumers now use AI to **research products**[4]

31%
use AI to **find deals before** making a purchase[4]

33%
use AI to **summarize reviews**[4]



Buying decisions are also shaped by the **people shoppers trust**. Research commissioned by Snap shows that:



61%

of Snapchatters say **friends and family** are their most influential source for purchase decisions[3]

85%

of Gen Z and Millennials **involve friends** somewhere in their shopping journey.[5]

For marketers, this changes an important assumption. Purchase decisions aren't made at a single point in time—they're **built across a series of moments before conversion**. The next question is whether your media plan reflects that journey.

Key Takeaways

- Today's shoppers **build confidence before they buy**—not just at the moment of purchase.
- **AI, search, reviews, social content, and retailer information** all influence buying decisions.
- Understanding where those decisions happen is the first step toward **evaluating whether your media plan reflects the modern purchase journey**.

THE PERFORMANCE MARKETER'S DECISION

A Five-Minute Media Plan Pressure Test

Every media plan makes assumptions about where customers are influenced. Before you invest more budget, **run the Five-Minute Media Plan Pressure Test.**

These four checks help identify where your planning assumptions may no longer match shopper behavior. That's especially important as many **marketers are moving beyond last-click attribution to better understand the full customer journey**.[6]



ALREADY-SOLD SPEND

How much of your budget only reaches people who already chose you?

Not every ad dollar wins a new customer. Across 225 regional tests, brand-name search was the only ad type that lost money—every $1 spent returned roughly 70 cents in incremental sales. Much of that "captured" demand may be created elsewhere: research shows digital media investment can drive organic branded searches.[7] [8]

Self-Check

Add up spend on brand-name search and ads to recent site visitors. That is your "already-sold spend" — it can only close shoppers who found you some other way.

Benchmark

Search your own brand name. If competitors are bidding on it, defending it can make sense — brands under attack see a real sales lift 82% of the time, versus 35% with no competition.[9] If there is no competition, that spend is mostly paying for sales you would have made anyway.

Monday Move

Trim brand-defense spend to what is needed to hold off competitors. Move the rest toward people who have not chosen you yet.

QUESTION COVERAGE

Do your ads answer what shoppers are actually researching?

Your targeting is not the deciding factor. Your copy is. Across roughly 450 studies on ad-attributable sales, **creative drove about half the effect**—nearly 2.5x more than most marketers assume—while targeting drove roughly a tenth.[10] What decides whether they pick you is what your ads say, not how tightly they are targeted.

Self-Check

List the five things a shopper wants to know before buying: fit, fair price, proof, returns, and why this one. Count how many of your ads answer any of them.

Benchmark

Most retail accounts land at zero or one. Three or more is ahead of the category norm. Zero means your ads restate the offer and leave the deciding moment to someone else's reviews.

Monday Move

Build your next round of ads so each of those five questions has at least one ad answering it directly.

If those two checks reveal gaps, the next question is **whether shoppers see the same story from first ad to checkout**.

STORY CHECK

Does your story stay consistent from the first feed ad through search, product page, and reviews?

Social commerce is on track to pass $100 billion in U.S. sales in 2026, growing roughly twice as fast as online shopping overall,[11] and **72% of Snapchatters shop multiple times every month**, with more than half shopping on social at least weekly.[12] If you're investing to create demand, every touchpoint should reinforce the same story. When your value proposition, pricing, or proof changes from your ad to your product page or reviews, shoppers have to rebuild confidence before they buy.

Self-Check

Follow your best-selling product the way a customer would—from your first ad to search results, your product page, customer reviews, and checkout. Mark every place where the value proposition, pricing, or proof changes.

Benchmark

Shoppers should encounter the same core claim, proof point, and value proposition from the first ad through the product page and reviews. Every inconsistency is another moment where confidence has to be rebuilt.

Monday Move

Choose one hero product and one proof point—such as a customer review, product claim, or performance statistic—and carry it consistently from your ads through checkout.

MEASUREMENT CHECK

Have you defined success before you test?

In tests run around Cyber Week 2025, 41% of the sales a campaign drove arrived *after* the ads had stopped running.[13] The cost of guessing wrong is measurable: **brands that added upper-funnel demand-building to an all-conversion plan improved total ROAS by about 90%,** while brands that pulled back to conversion-only spend gave up roughly 40%.[14] New channels do not fail; they get judged too early.

Self-Check

Think about the last channel you tested. Before it launched, did your team agree on how success would be measured—and when the results would be evaluated?

Benchmark

Don't evaluate a new channel using only week-two dashboard results. Strong tests define the evaluation window before launch and continue measuring for at least two to four weeks after campaigns end.

Monday Move

Before your next campaign, agree on three success metrics and one decision date before launching the test.

The goal is not to redesign your media plan overnight. It is to **identify one assumption worth testing**. Small changes in **where you invest**, **what your creative answers**, or **how you measure success** can reveal opportunities that last-click reporting alone may never surface.

THE FIVE-MINUTE MEDIA PLAN PRESSURE TEST

The four pressure tests from the previous pages are summarized here as a quick reference for your next media planning session. **Use this page to revisit each planning check and identify your next opportunity to test.**

- [ ] **Already-Sold Spend**
  Are you investing only in channels that capture the final conversion, or also those that influence the decision beforehand?

- [ ] **Question Coverage**
  Does your media plan answer the questions shoppers ask at each stage of the purchase journey?

- [ ] **Story Check**
  Are you showing up with the right message before customers are ready to buy?

- [ ] **Measurement Check**
  Are you measuring the full customer journey, not just the final click?

Remember: You don't need to change everything at once. Start with one pressure test, run one meaningful test, and use what you learn to inform your next media decision.

Footnotes

1. Deloitte, *2026 Global Retail Industry Outlook*.
2. Alter Agents, *The Gen Z Spending Power Report*, commissioned by Snap Inc. (2023).
3. NRG, *Fashion Forward: Emerging Trends in Apparel* Purchases, commissioned by Snap Inc., Publicis Media, and NRG (2024).
4. IBM & National Retail Federation, *Own the Agentic Commerce Experience* (2026).
5. Alter Agents, *The Gen Z Spending Power Report*, commissioned by Snap Inc. (2023).
6. eMarketer, *US Marketer Measurement Survey*, commissioned by Snap Inc. (2024).
7. Stella, *2025 DTC Digital Advertising Incrementality Benchmarks* (2025).
8. Filippou, G., Georgiadis, A.G. & Jha, A.K., *Unveiling digital dynamics: Do digital media investments impact organic branded searches?*, Journal of Marketing Analytics (2025).
9. Haus, *When Is Branded Search Worth the Investment?* (2025).
10. NCSolutions sales-effect meta-analysis (2023); Advertiser Perceptions survey (2024).
11. eMarketer, *US Social Commerce Forecast* (2026).
12. GWI Q3/Q4 2024, commissioned by Snap Inc.
13. Haus, *The Cyber Week Incrementality Report* (2025).
14. WARC, *The Multiplier Effect (2025)*.