

**KEY TAKEAWAYS:****ONLINE SHOPPING CONTINUES TO GAIN, MALL SHOPPING SEEN AS A LOSER**

- Consumer confidence in discretionary spending is net positive (but a touch worse y/y). Online shopping is increasingly viewed as a strong popularity gainer and most of the engagement trends among the online retailers in our survey are improving.
- Brick and mortar shopping is viewed as a popularity loser (especially mall shopping, which is the most negative and worsening).

**AMZN | PRIME TICKS BACK UP, CONSTRUCTIVE ENGAGEMENT TRENDS**

- Amazon Prime usage / subs ticked higher this quarter, with the % of users who do not have access to Prime reaching series lows.
- Most of the metrics related to the shopping experience, loyalty, mind share, etc, are improving for Amazon and are considerably better than the other online retailers in our survey.

**ETSY | FREE SHIPPING WILL RESONATE**

- Consumers overwhelmingly agree that they are more likely to buy from a site/app that offers free shipping and over half of them said when they shop online they always expect to get free shipping.
- Over half of Etsy customers believe free shipping over \$35 would move them to shop Etsy more often. However, we would note that the majority (59.1%) said they believe sellers would increase prices of products to cover costs (as opposed to 18.8% who believe they would keep pricing consistent and cover the shipping costs).
- An increased percentage of Etsy sellers are enrolled in Etsy payments q/q. All told, sellers have a fairly-neutral view on whether free shipping over \$35 is good or not, but more of them (41.9%) believe it will drive an increase in sales. Sellers were split on how they will handle the change (a third will reduce or stop selling on Etsy, a third will offer free shipping without raising prices, and a third will raise prices on products). Note – the survey contains 31 respondents who said they currently sell products on Etsy.

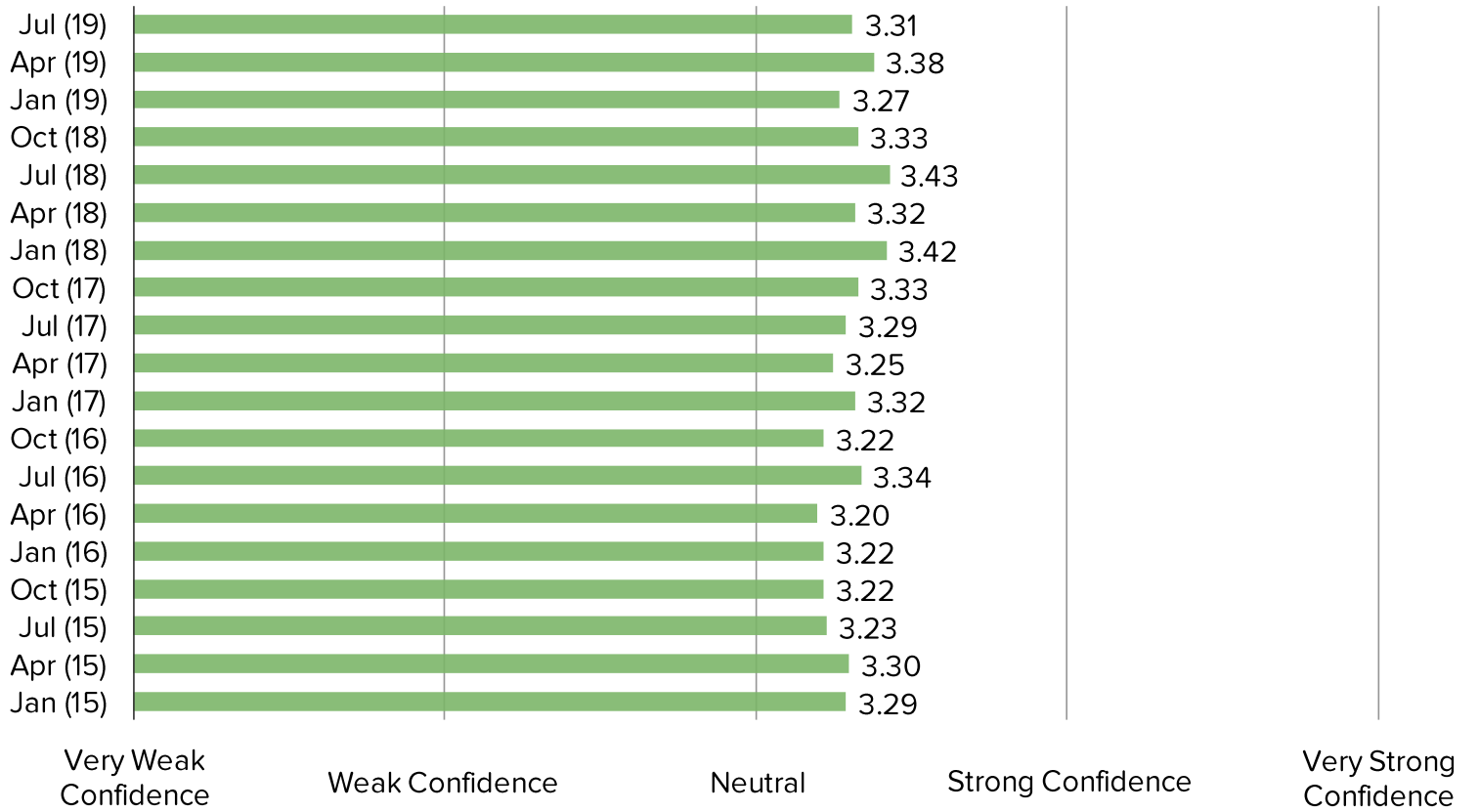
**GRPN | VOUCHER-LESS VIEWED POSITIVELY, IN EARLY INNINGS OF ADOPTION**

- 31.0% of Groupon users have credit cards linked to their Groupon account. Overall, users believe credit card linking is better than presenting vouchers.

# COMPETITIVE DYNAMICS

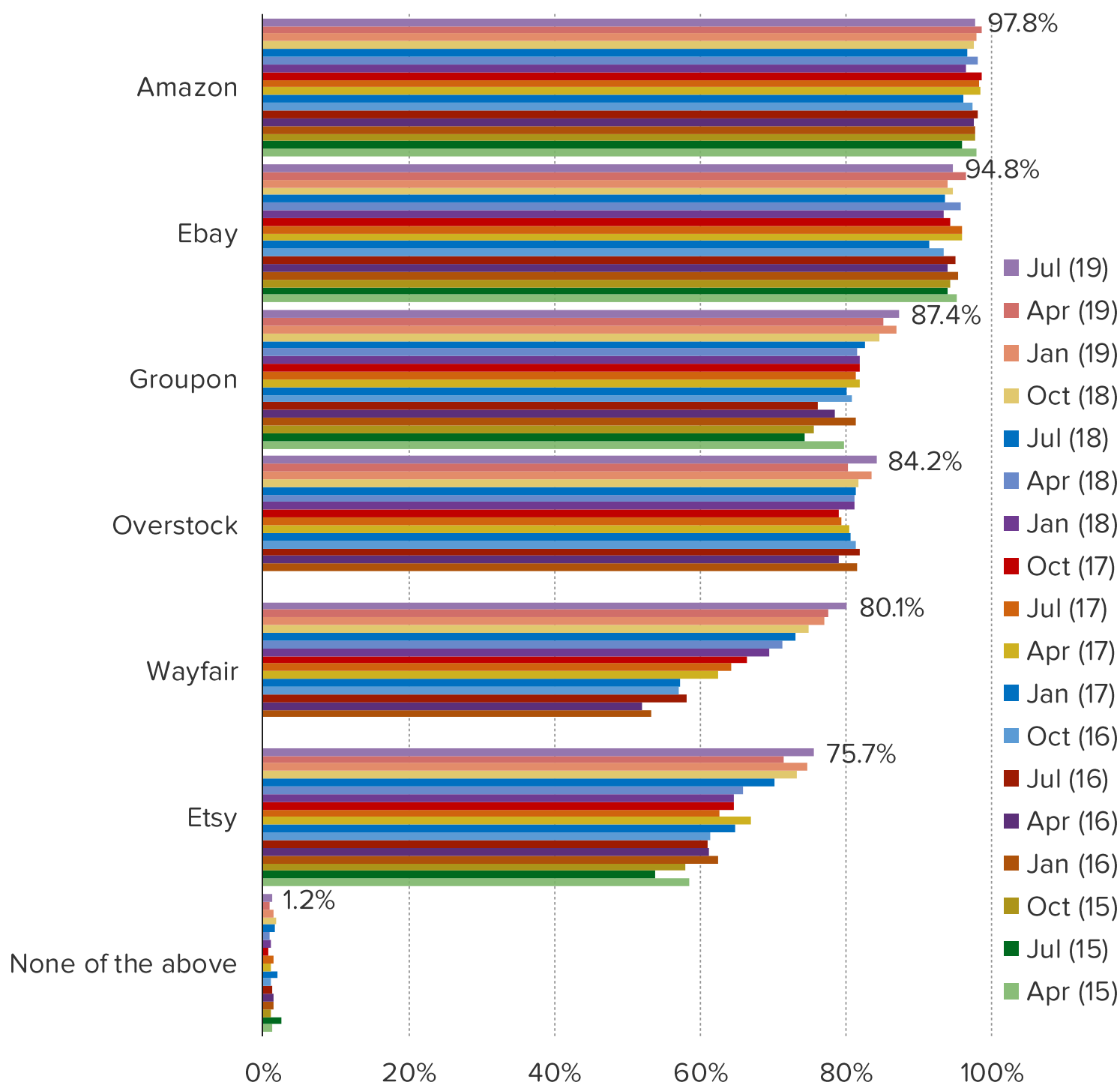
HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



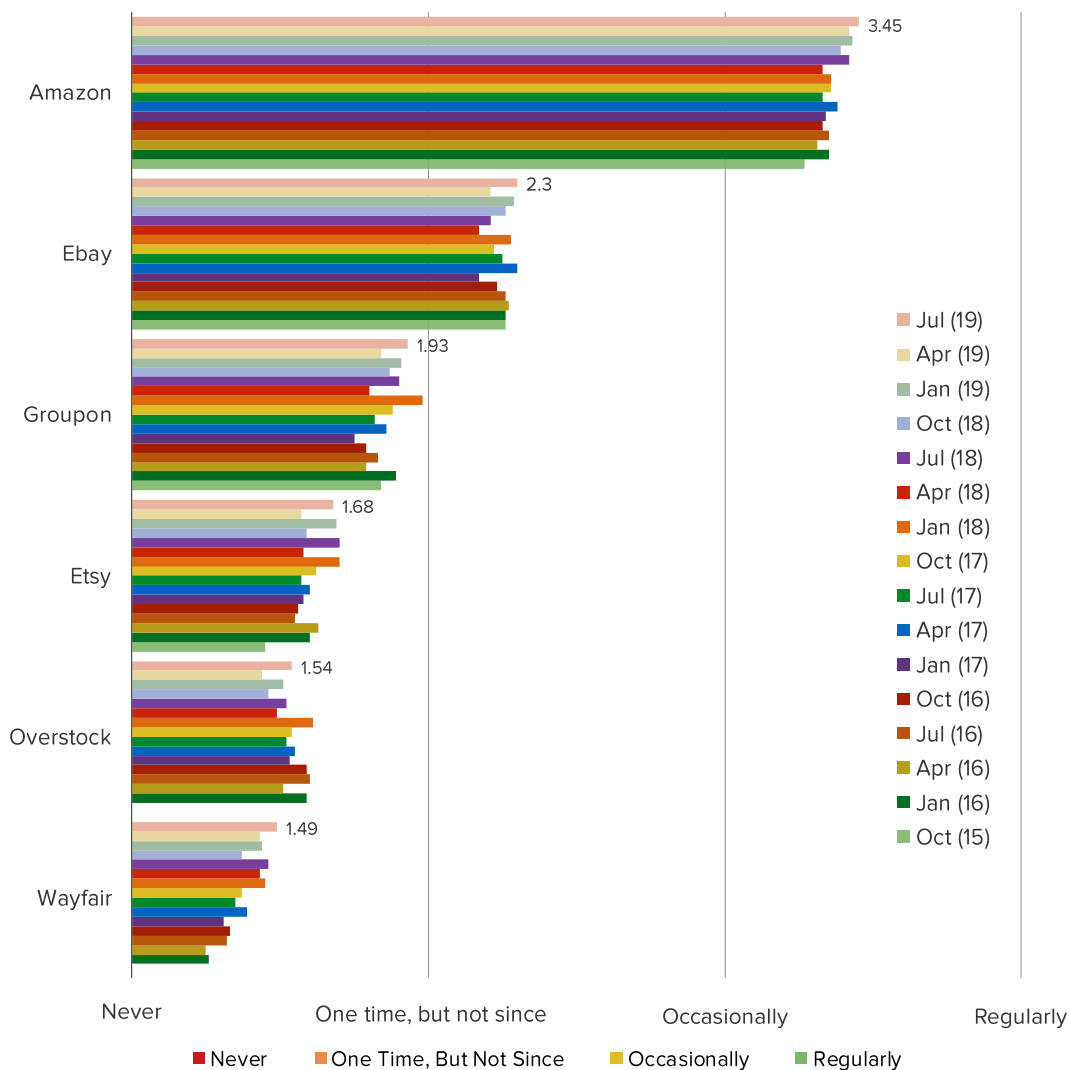
# BRAND AWARENESS

Posed to all respondents

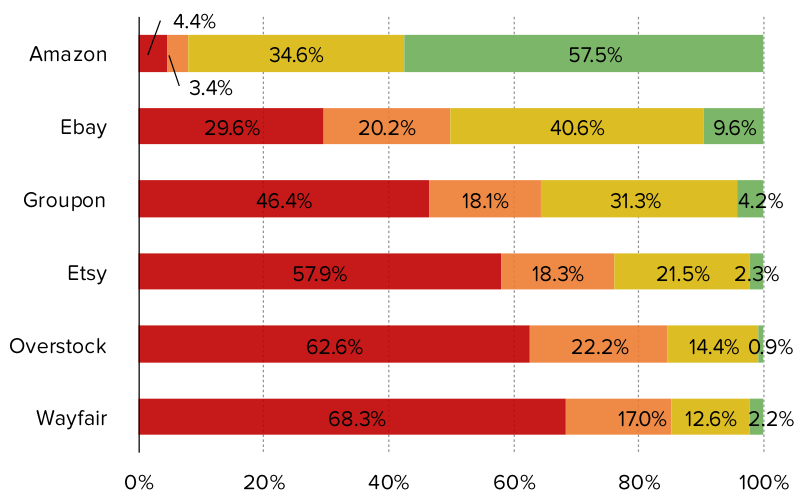


## CHARACTERIZING ENGAGEMENT WITH EACH SITE/APP

Posed to all respondents

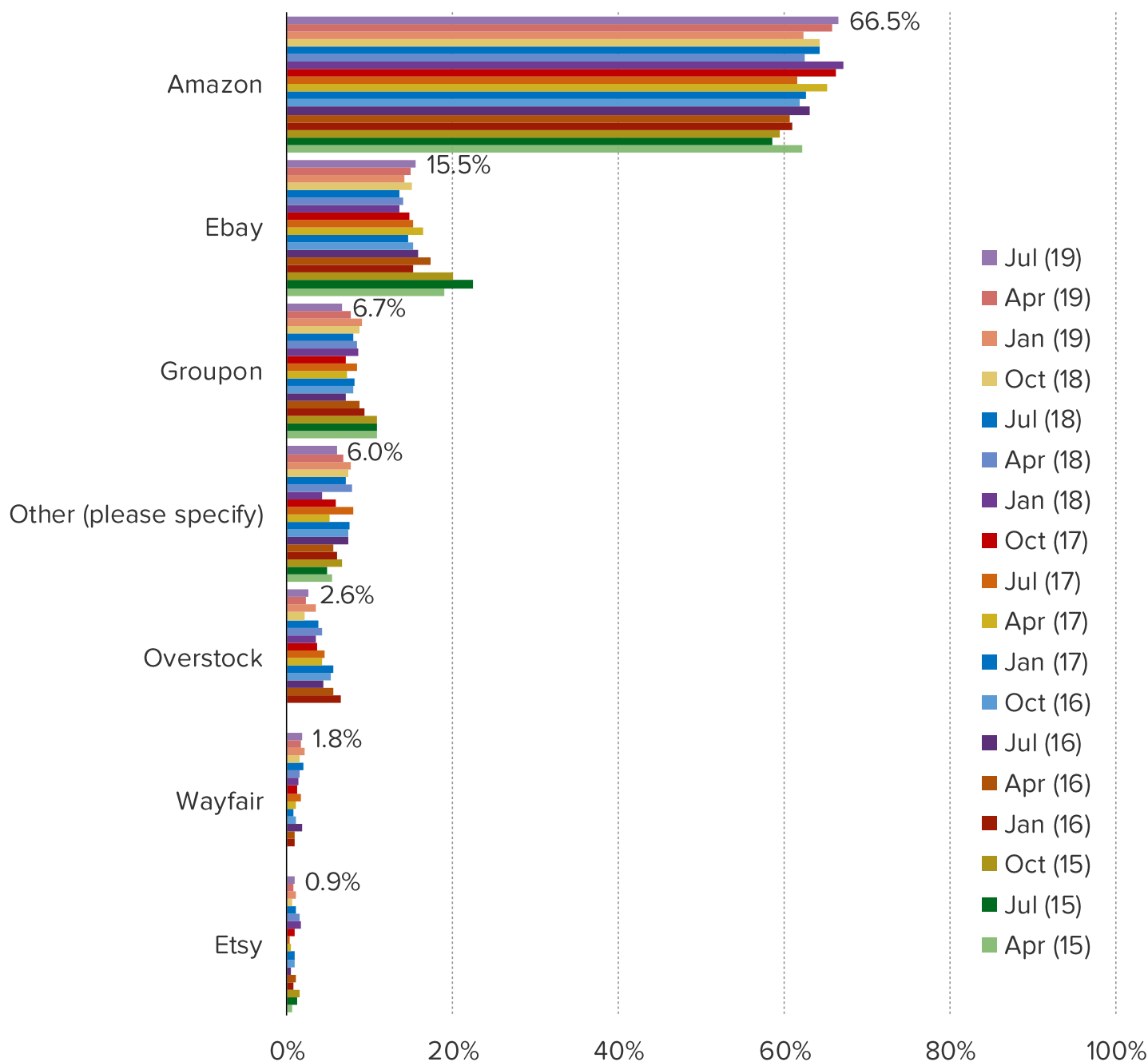


### JUL (19) PERCENTAGE BREAKDOWN



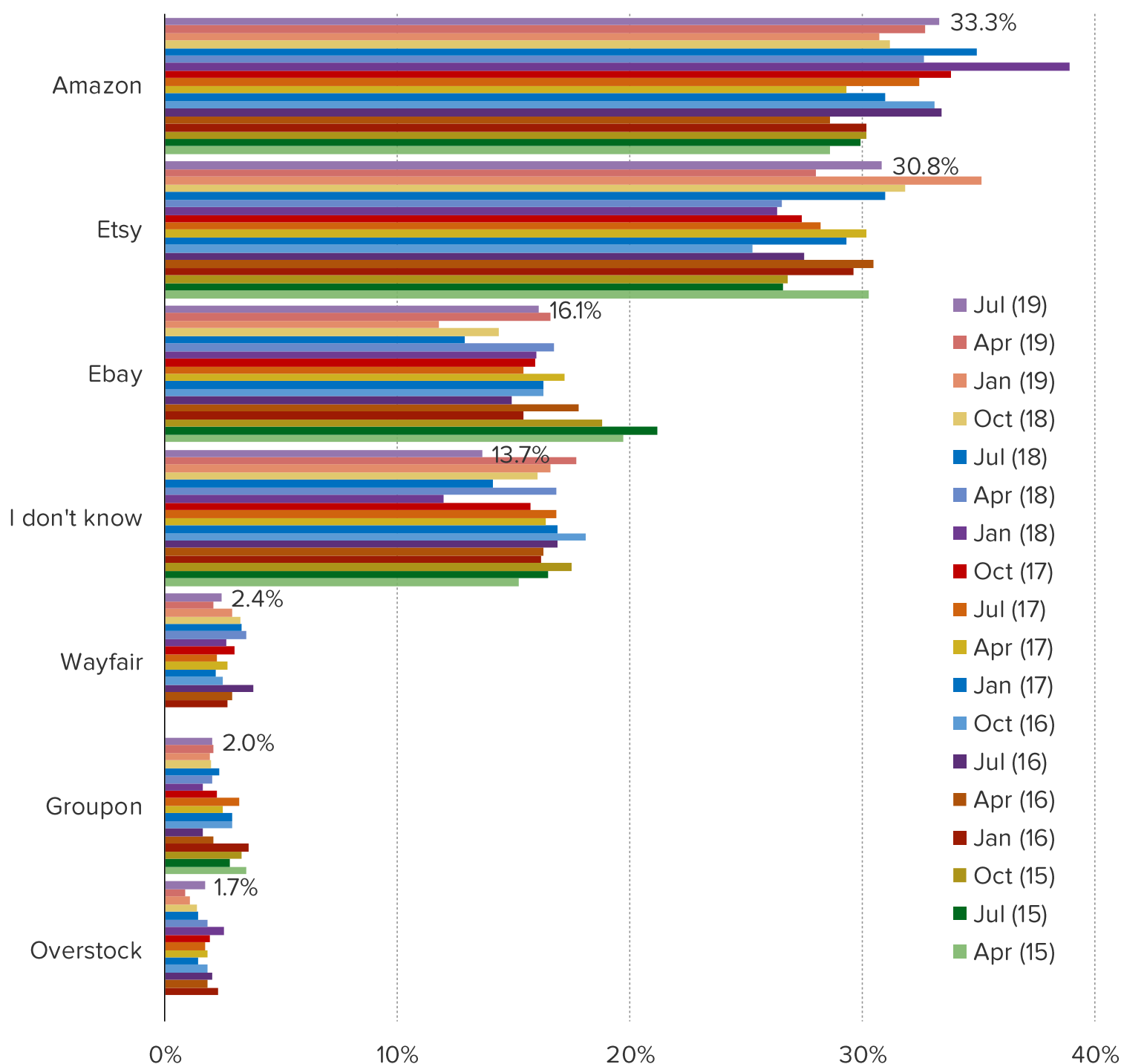
**ON WHICH WEBSITE/APP DO YOU EXPECT TO FIND THE BEST PRICES/DEALS?**

Posed to users of each site/app



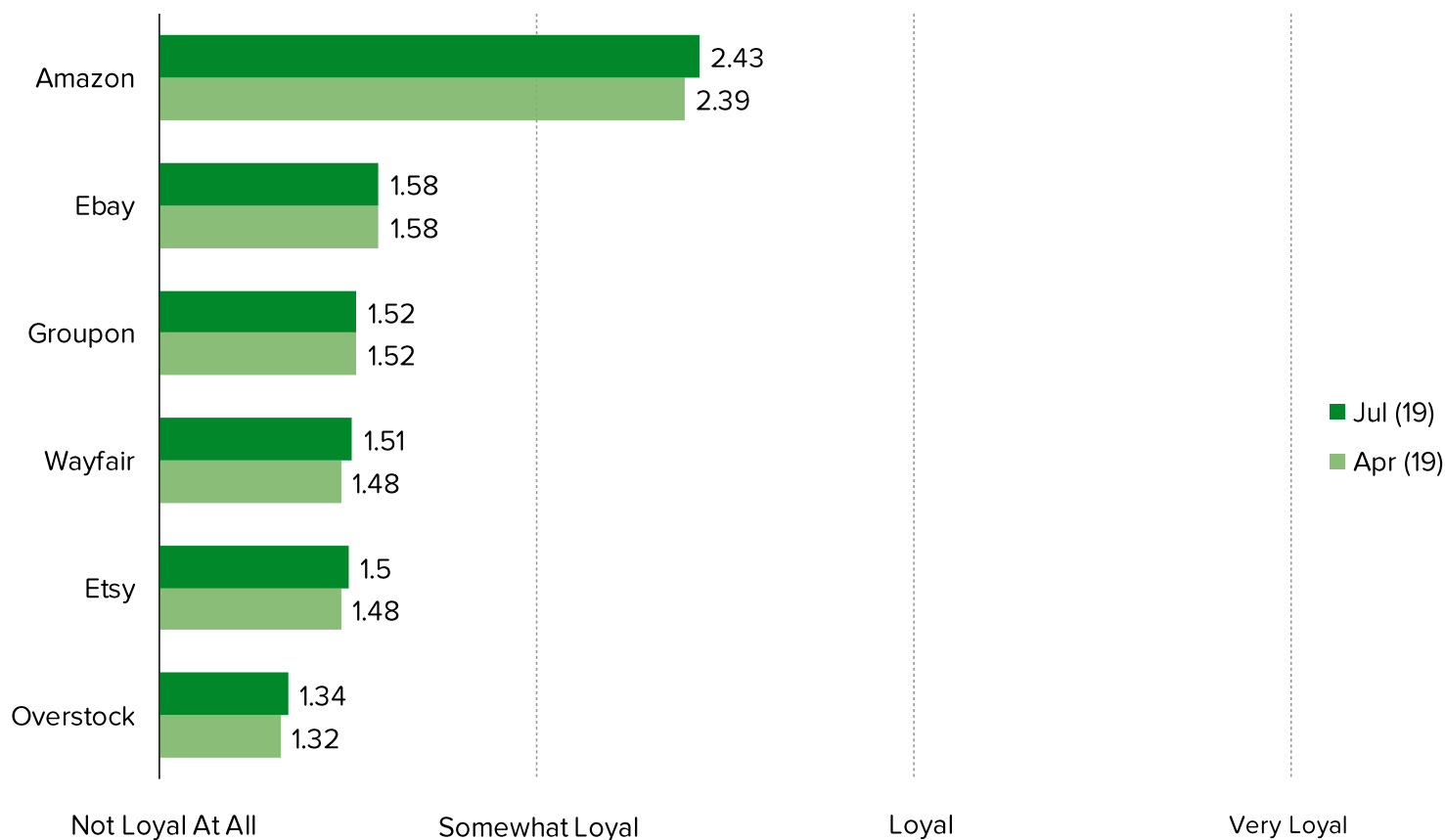
**WHICH OF THE FOLLOWING DO YOU FEEL OFFERS THE MOST UNIQUE PRODUCTS THAT YOU CAN'T FIND ANYWHERE ELSE?**

Posed to users of each site/app



**PLEASE RATE HOW LOYAL YOU ARE TO THIS APP/SITE FOR THE TYPES OF ITEMS YOU BUY FROM THEM:**

Posed to users of each site/app



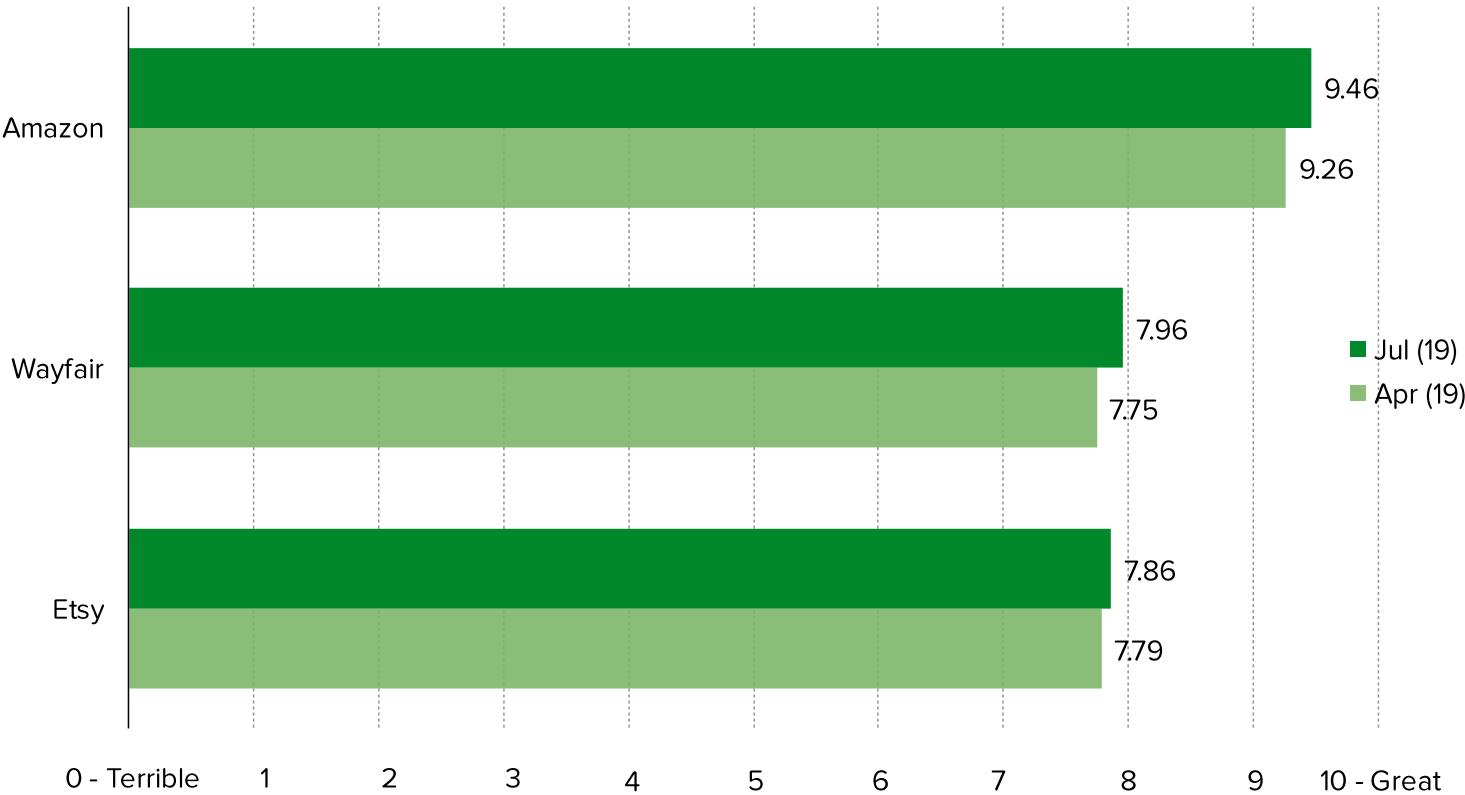
**JUL (19)  
PERCENTAGE  
BREAKDOWN**





HOW DO YOU FIND THE SHIPPING EXPERIENCE WITH THIS APP/SITE?

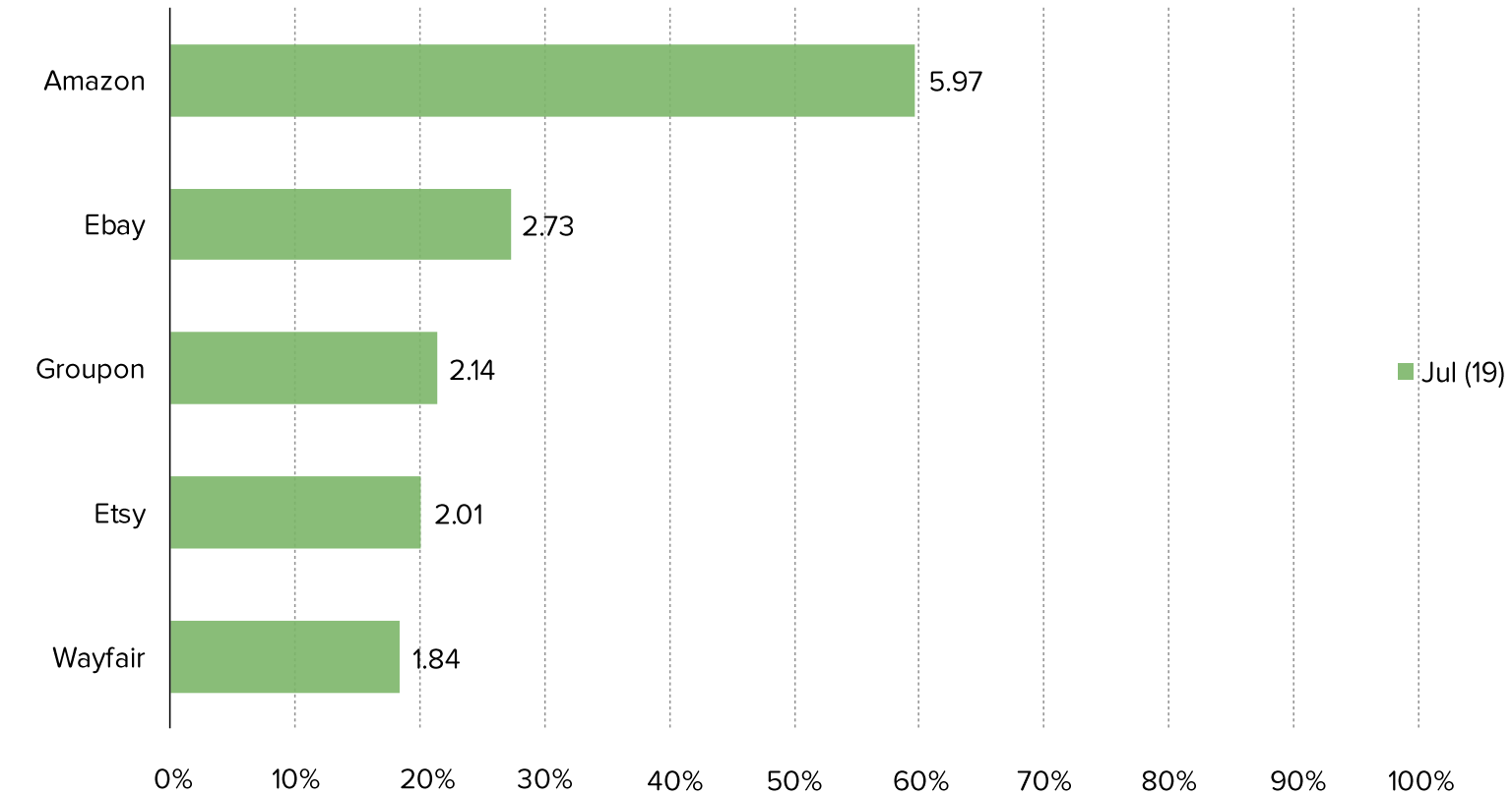
Posed to users of each site/app



From Bricks To Clicks

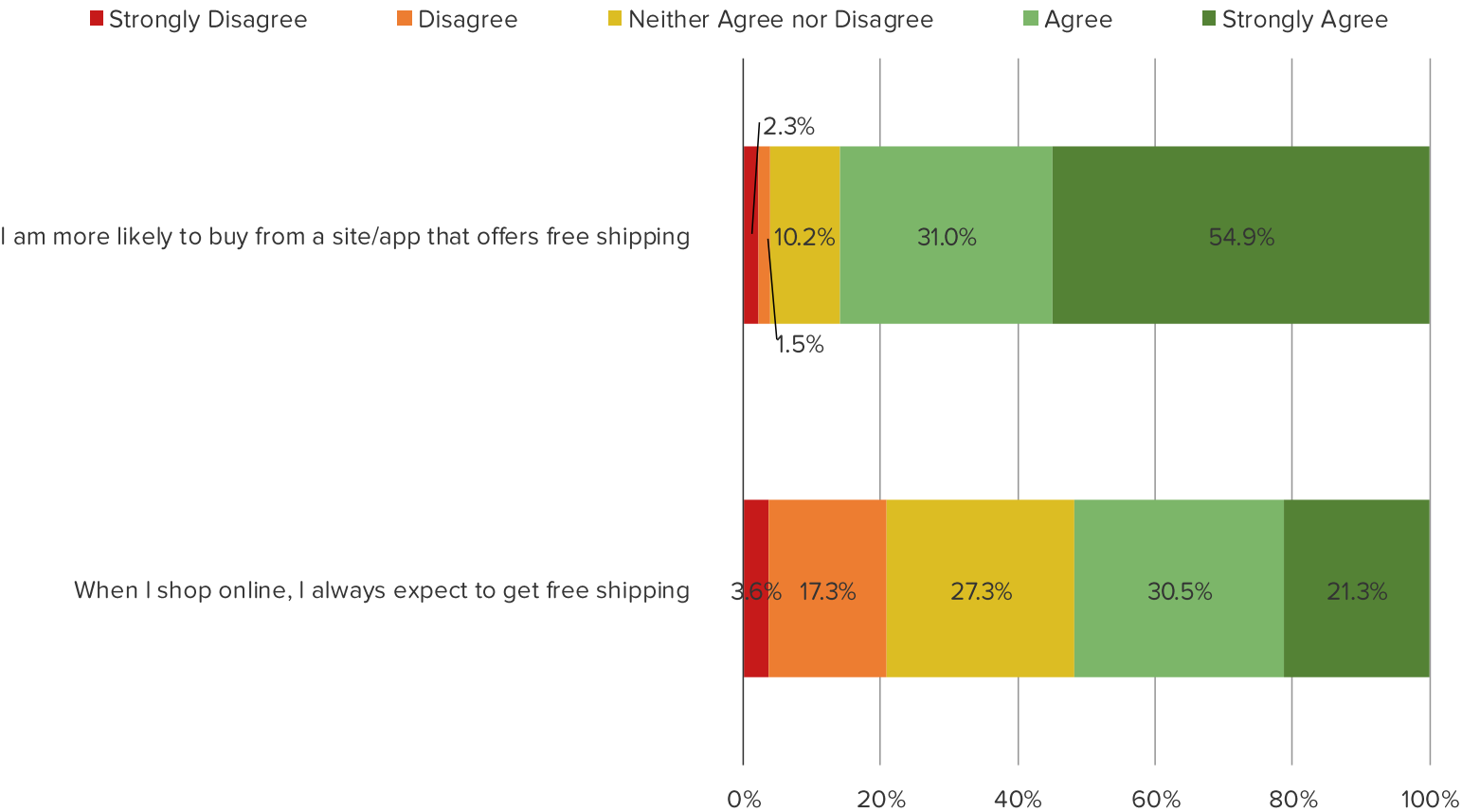
WHEN YOU BROWSE THIS SITE/APP, WHAT PERCENTAGE OF THE TIME DO YOU ACTUALLY WIND UP MAKING A PURCHASE?

Posed to users of each site/app



HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

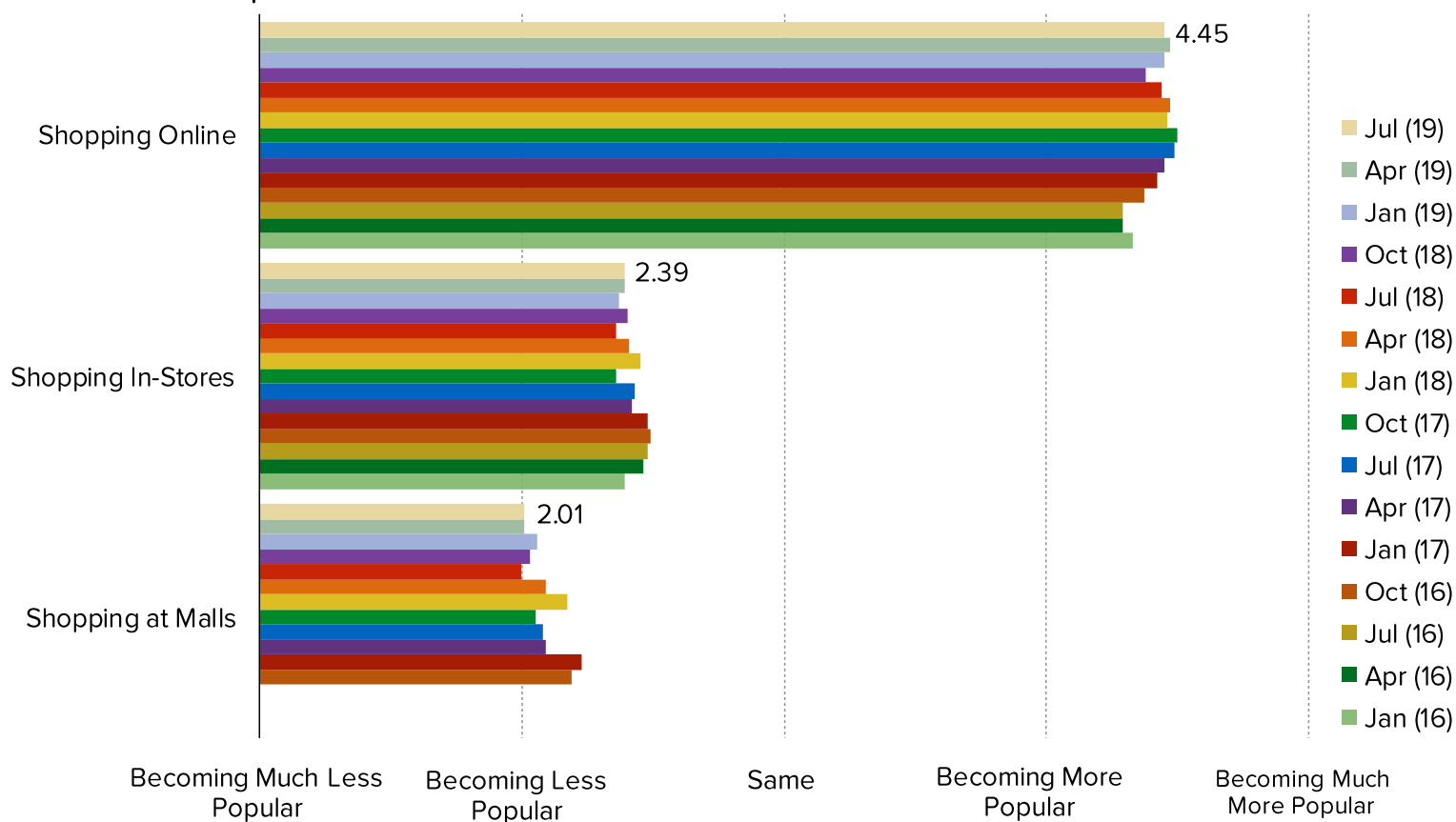
Posed to all respondents.



# INDUSTRY TRENDS

**ARE THE FOLLOWING TYPES OF ACTIVITIES BECOMING MORE OR LESS POPULAR?**

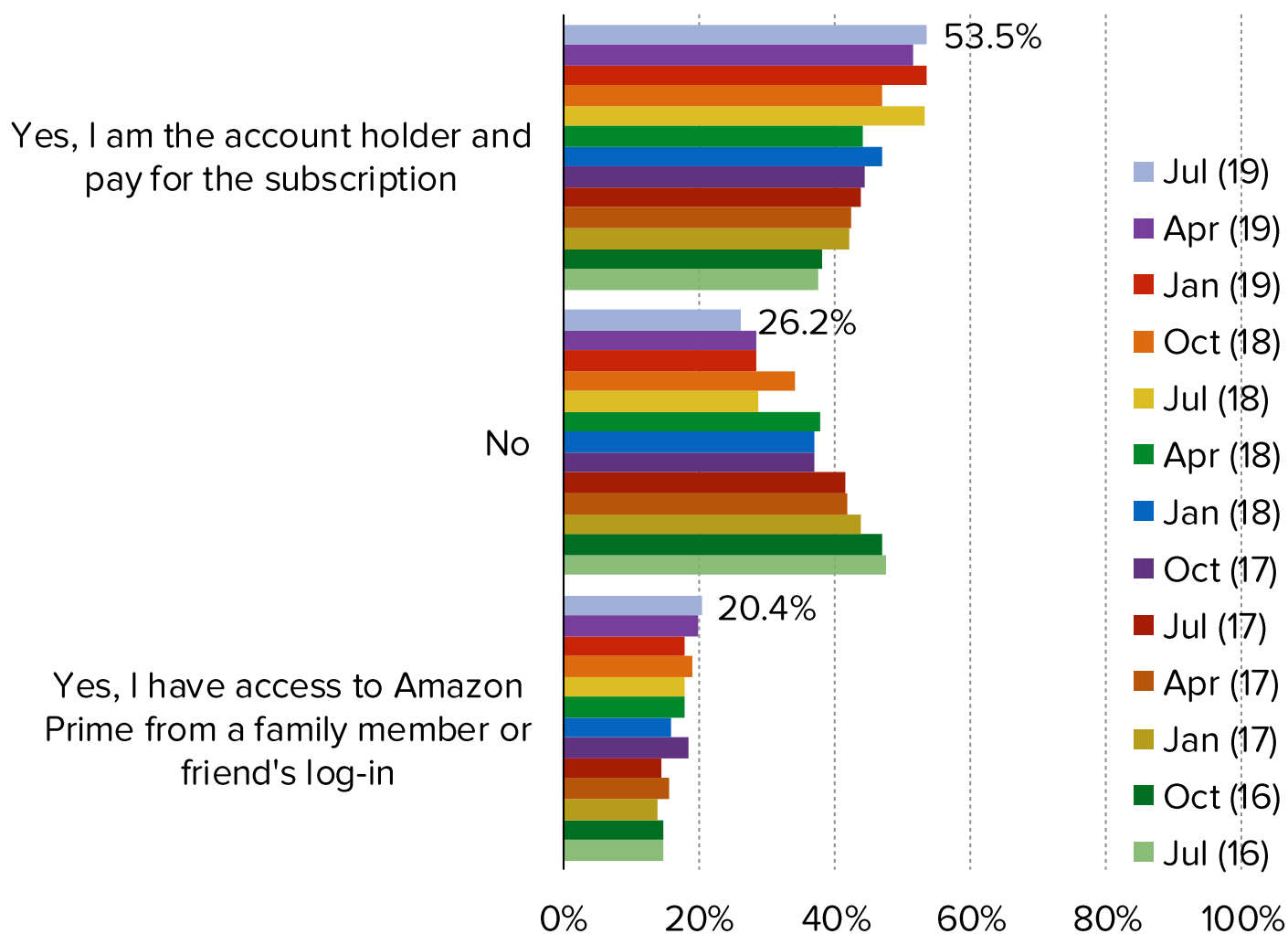
Posed to all respondents

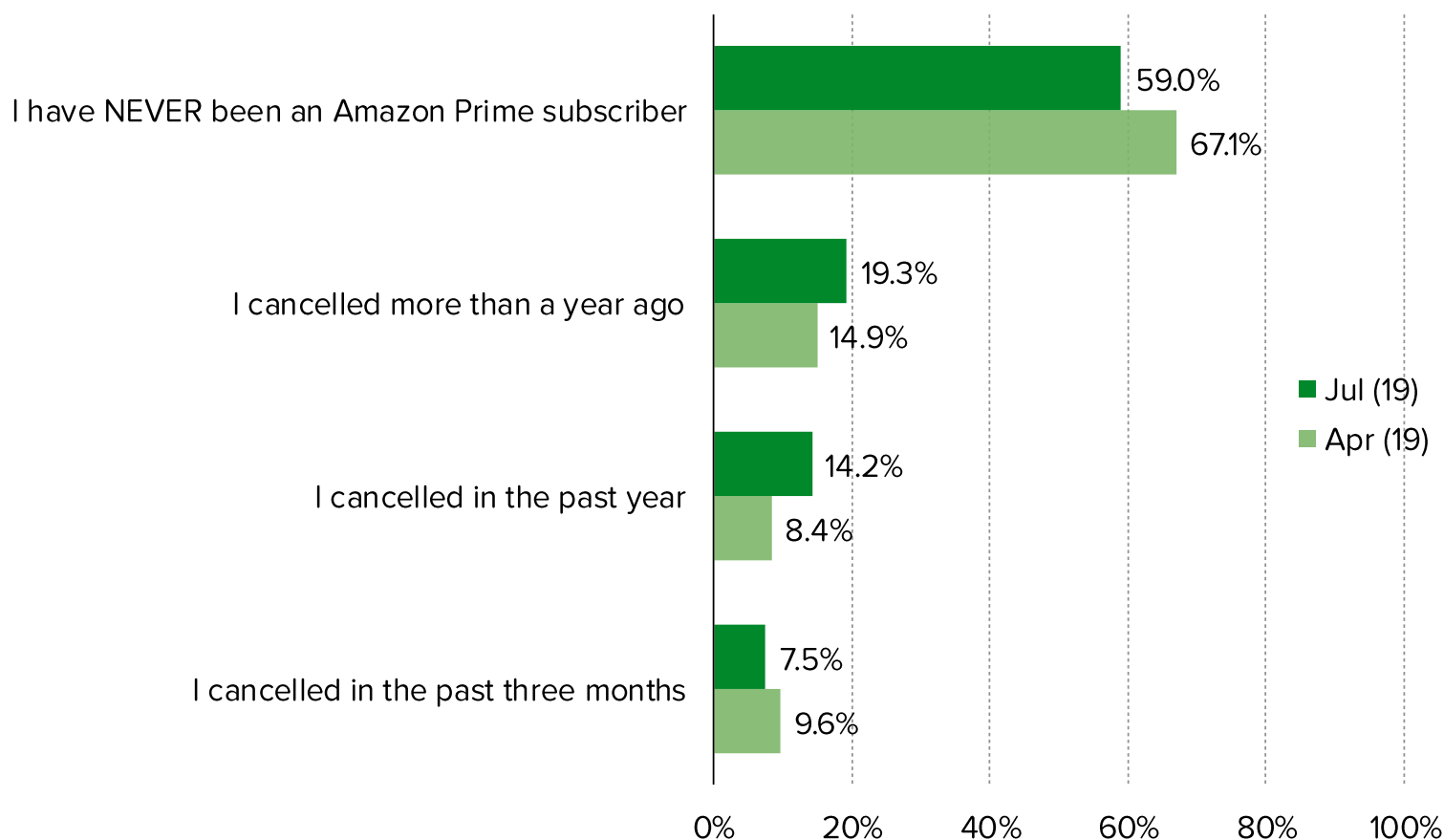


# AMZN TRENDS

## ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

Posed to Amazon users



**HAVE YOU EVER BEEN AN AMAZON PRIME SUBSCRIBER IN THE PAST?**Posed to Amazon users **who are not prime subscribers**



## From Bricks To Clicks

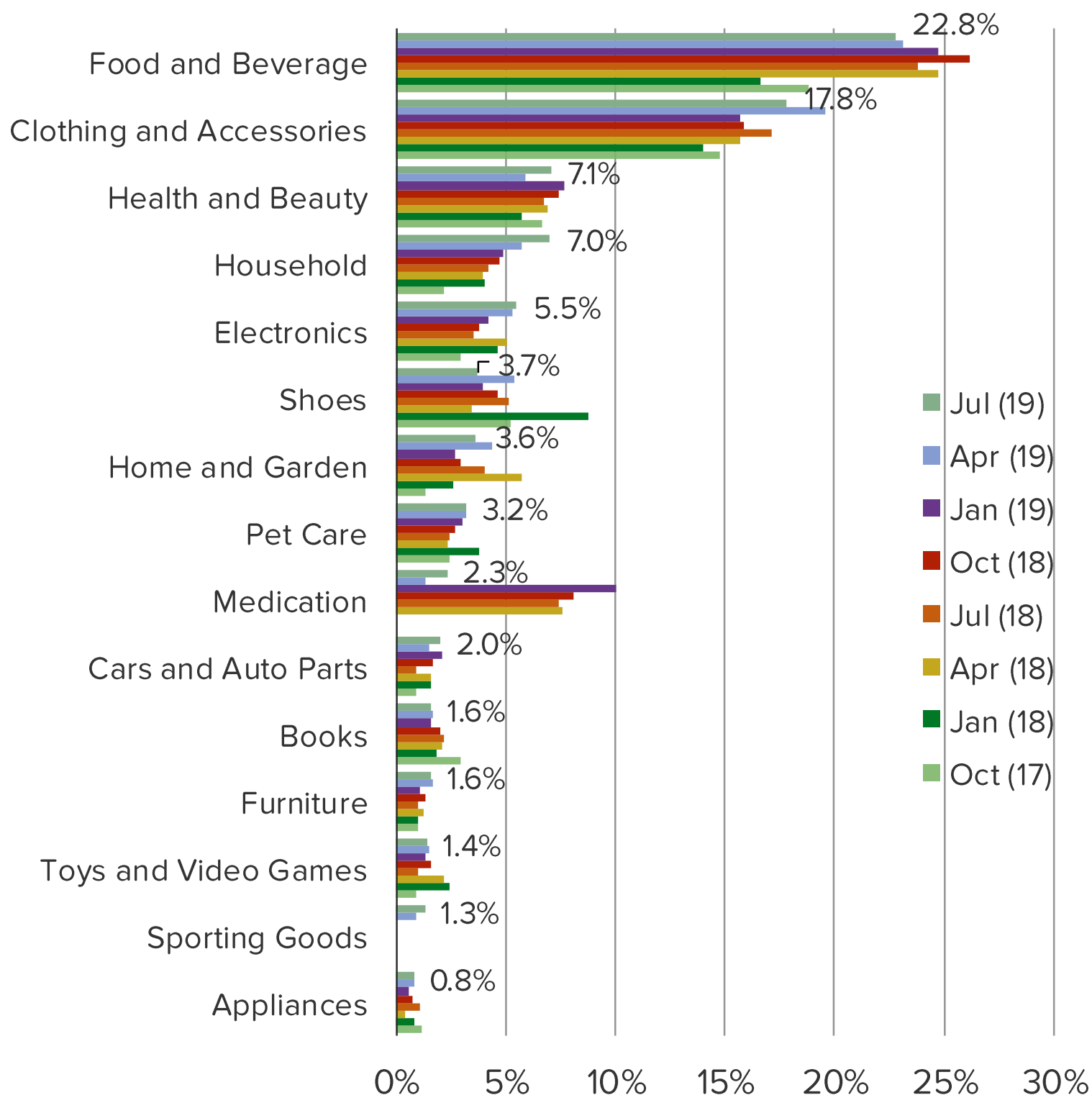
## WHY DON'T YOU HAVE AN AMAZON PRIME SUBSCRIPTION?

Posed to Amazon users who are not prime subscribers



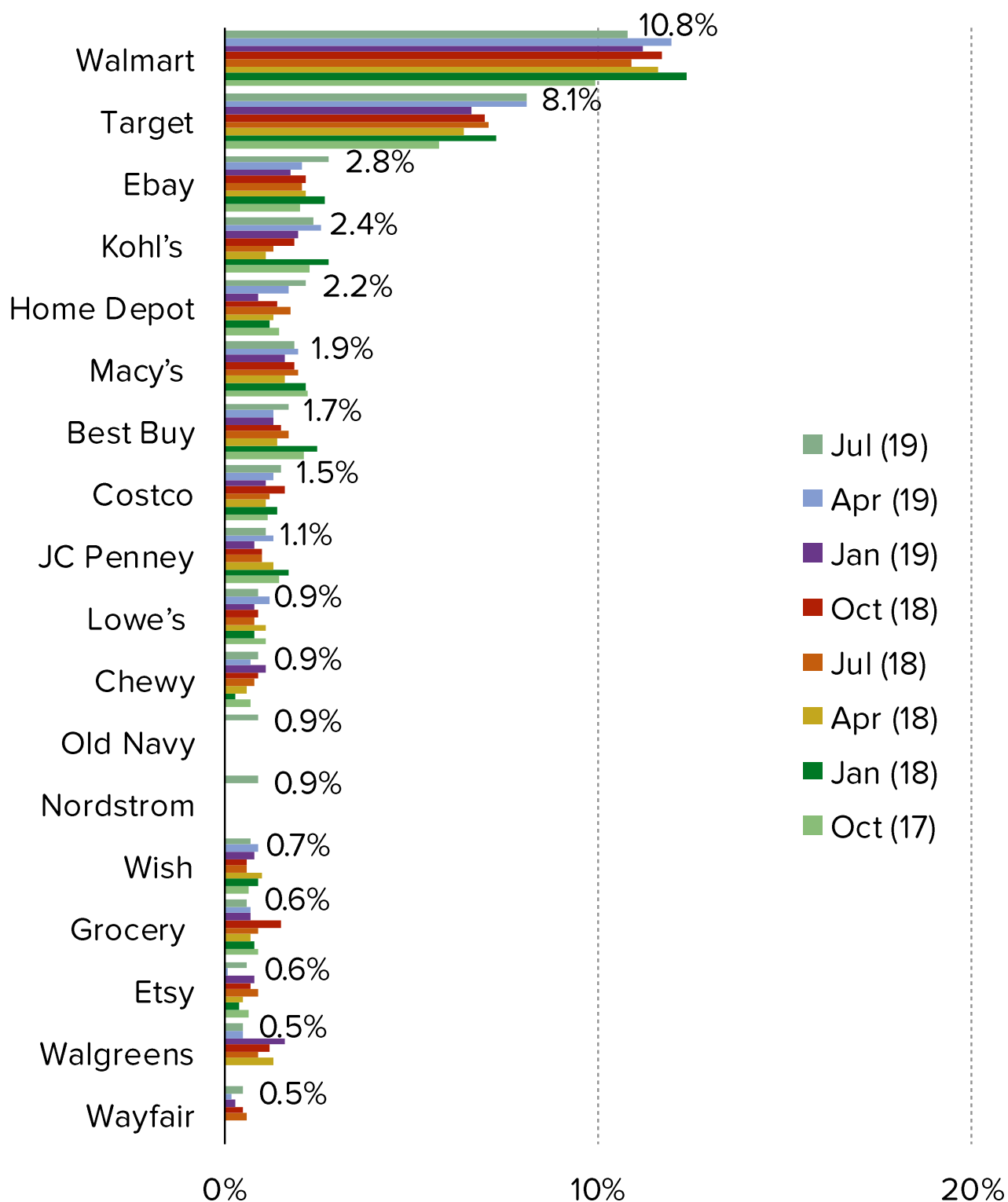
# FILL-IN: WHAT DON'T YOU GET ON AMAZON?

Posed to Amazon users



**FILL-IN: ARE THERE ANY SITES OR STORES YOU SHOP DIRECTLY INSTEAD OF GOING TO AMAZON?**

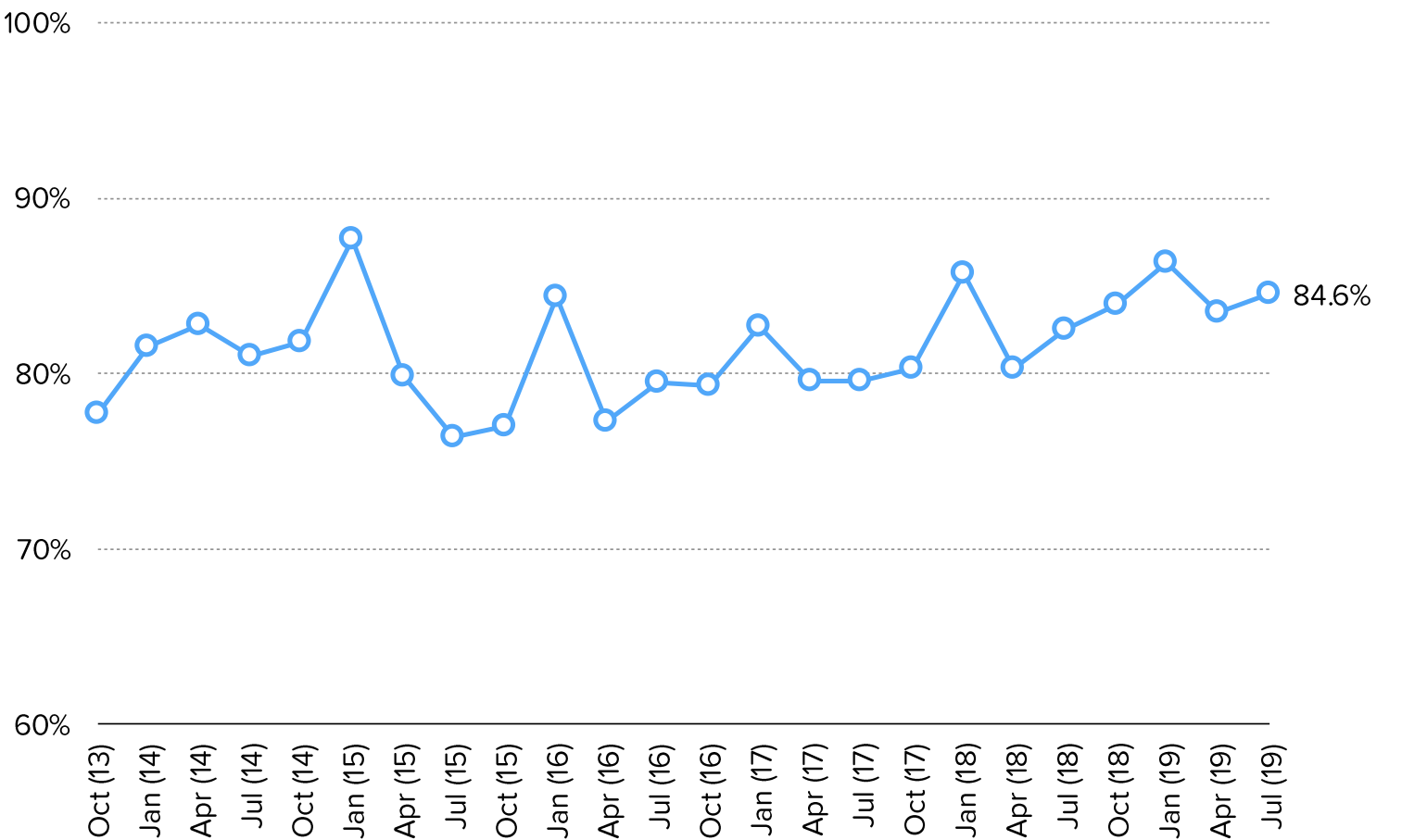
Posed to Amazon users



From Bricks To Clicks

AMAZON USERS - HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

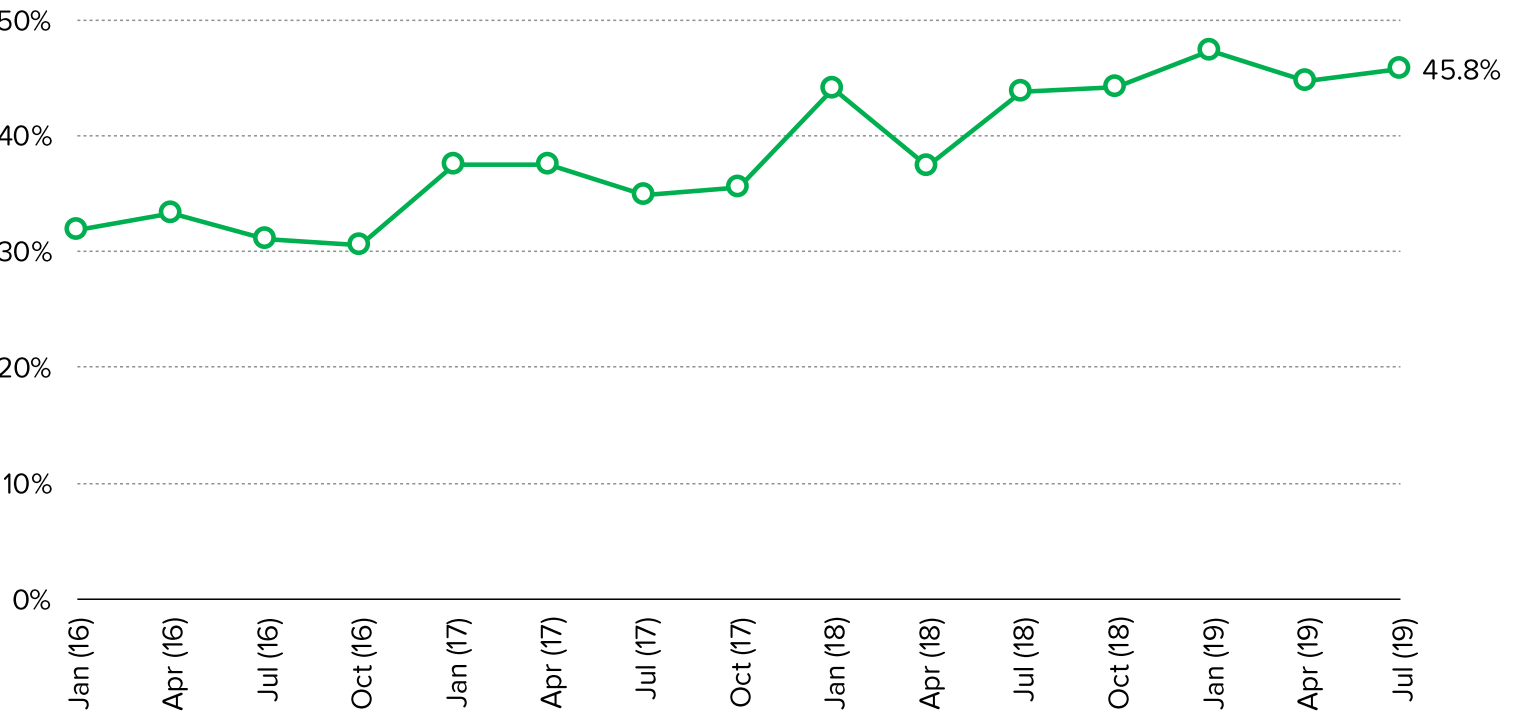
Posed to Amazon users



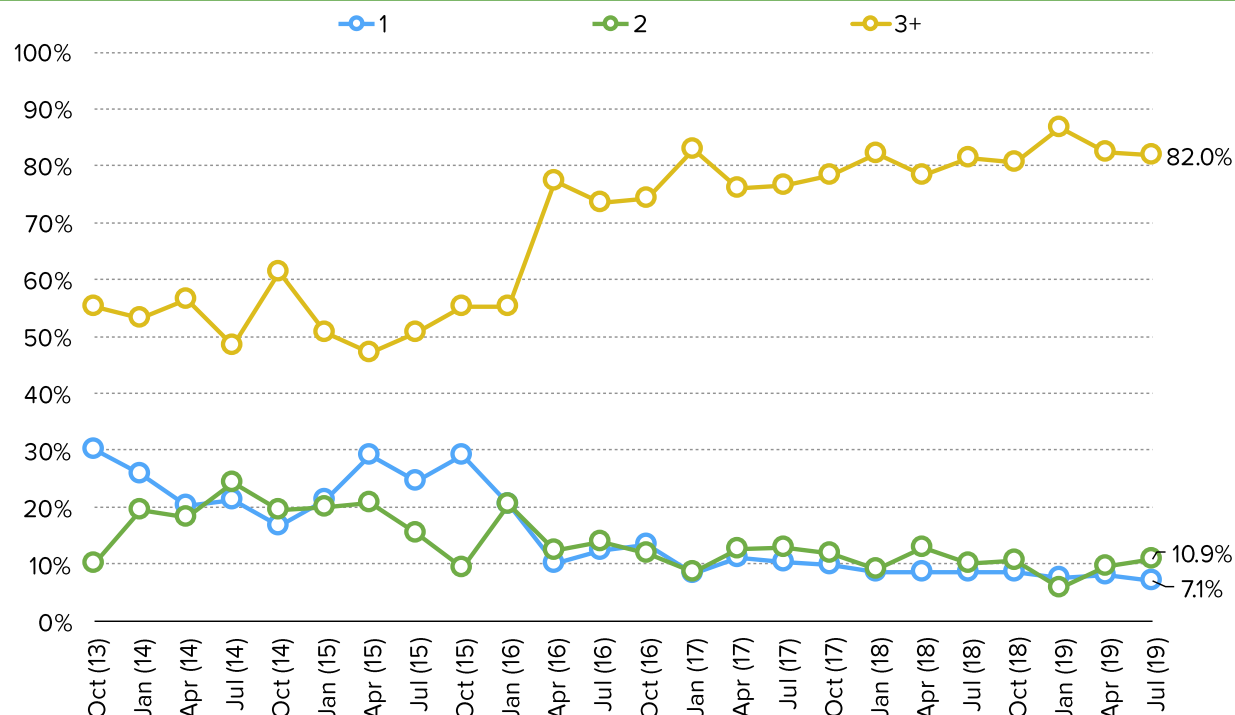
From Bricks To Clicks

AMAZON USERS - HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

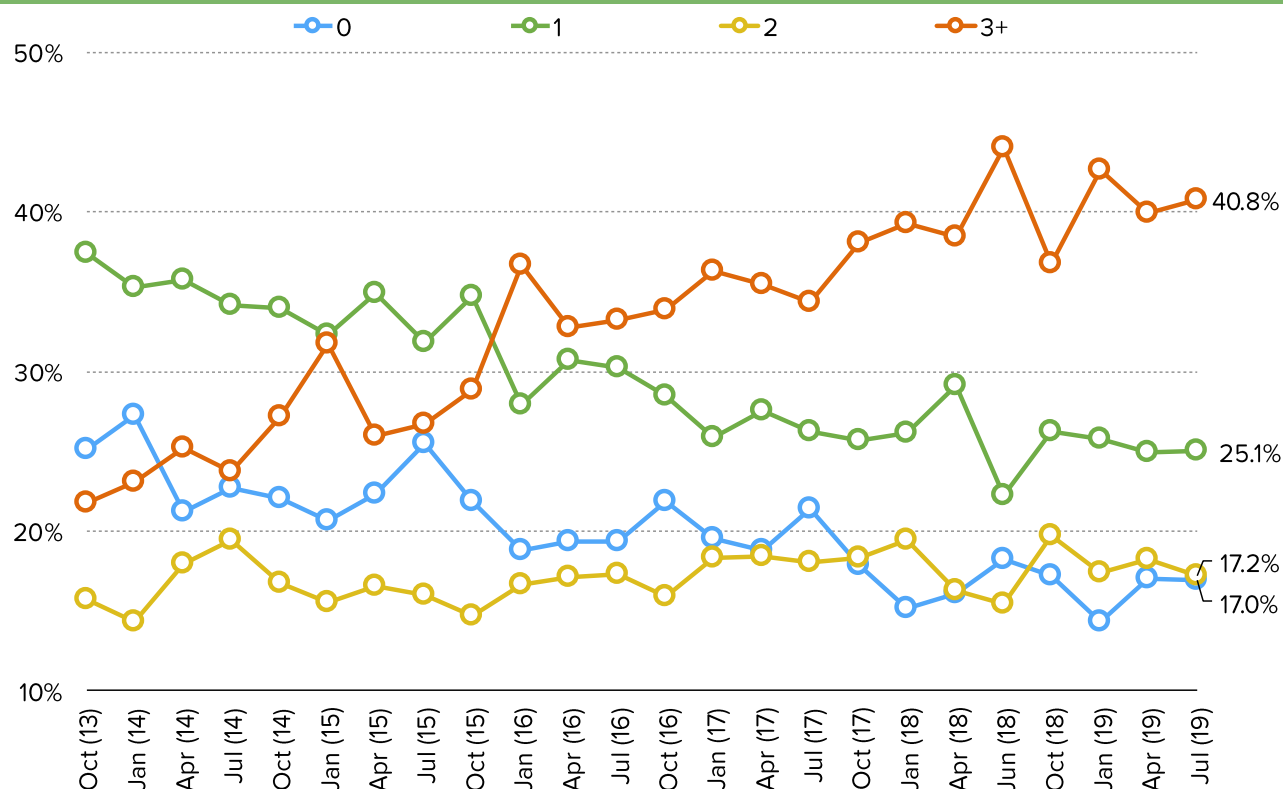
Posed to Amazon users



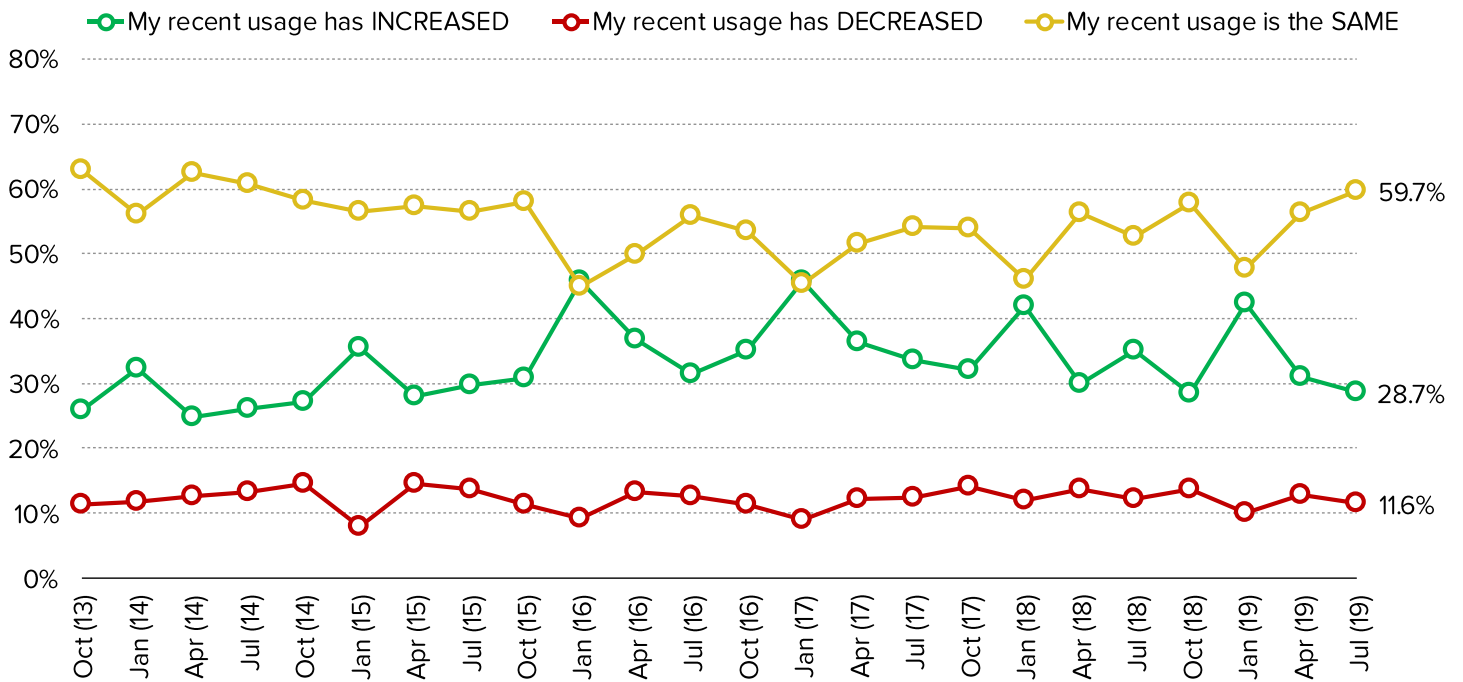
## PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS - HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



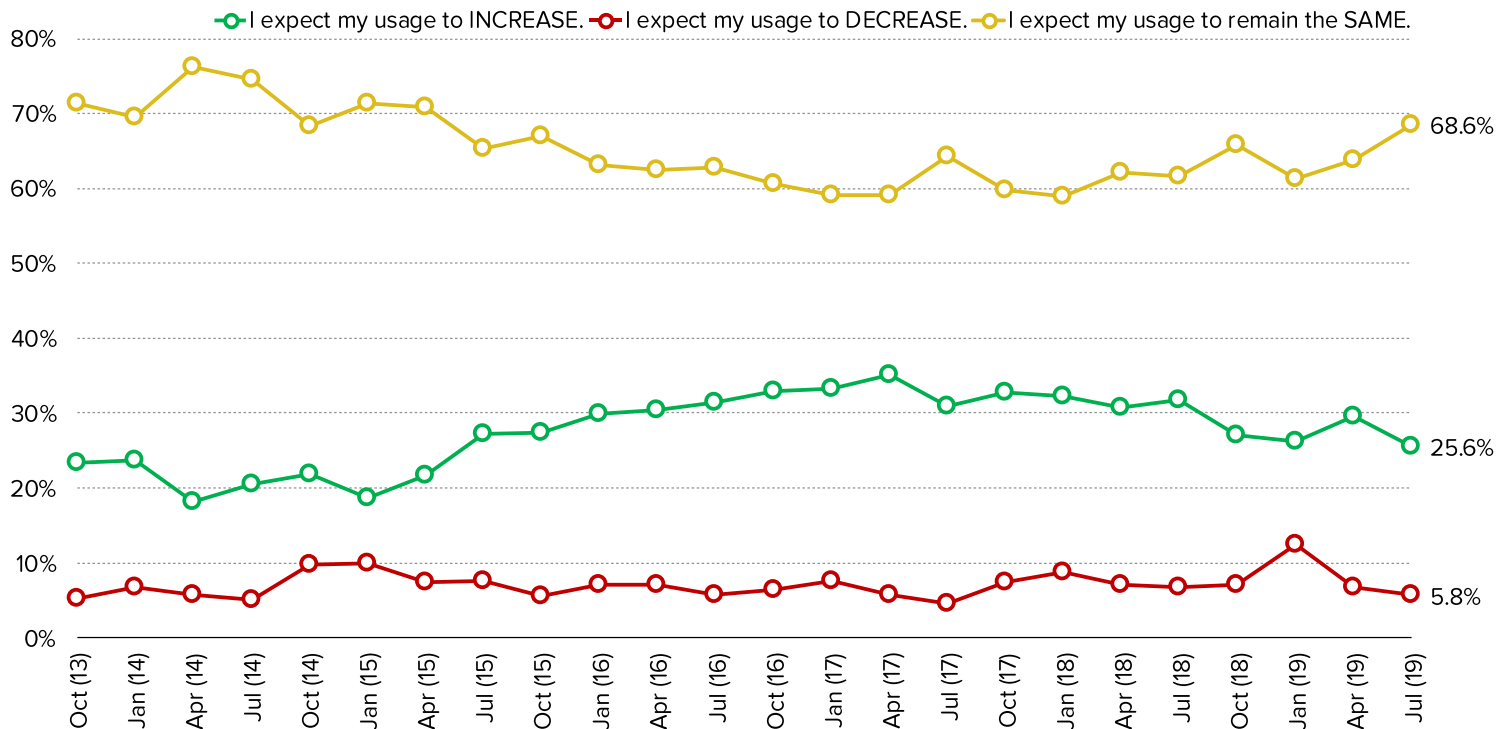
## AMAZON USERS - ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



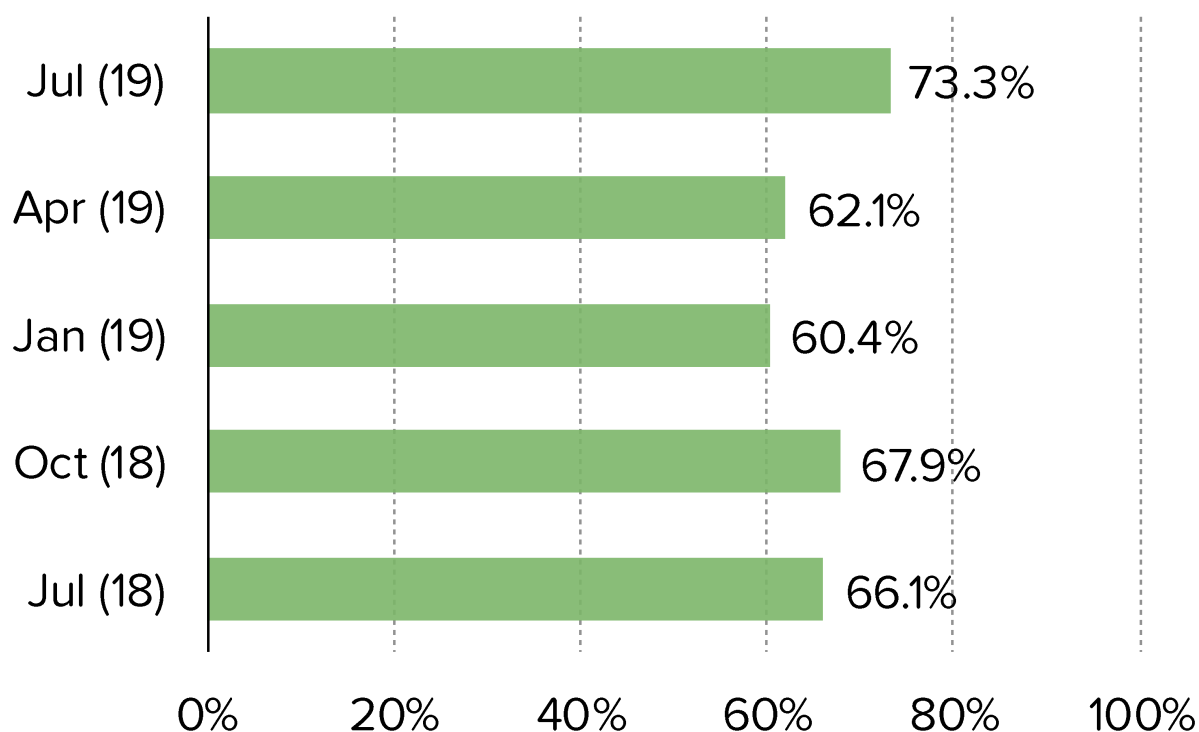
## AMAZON USERS - RECENT USAGE



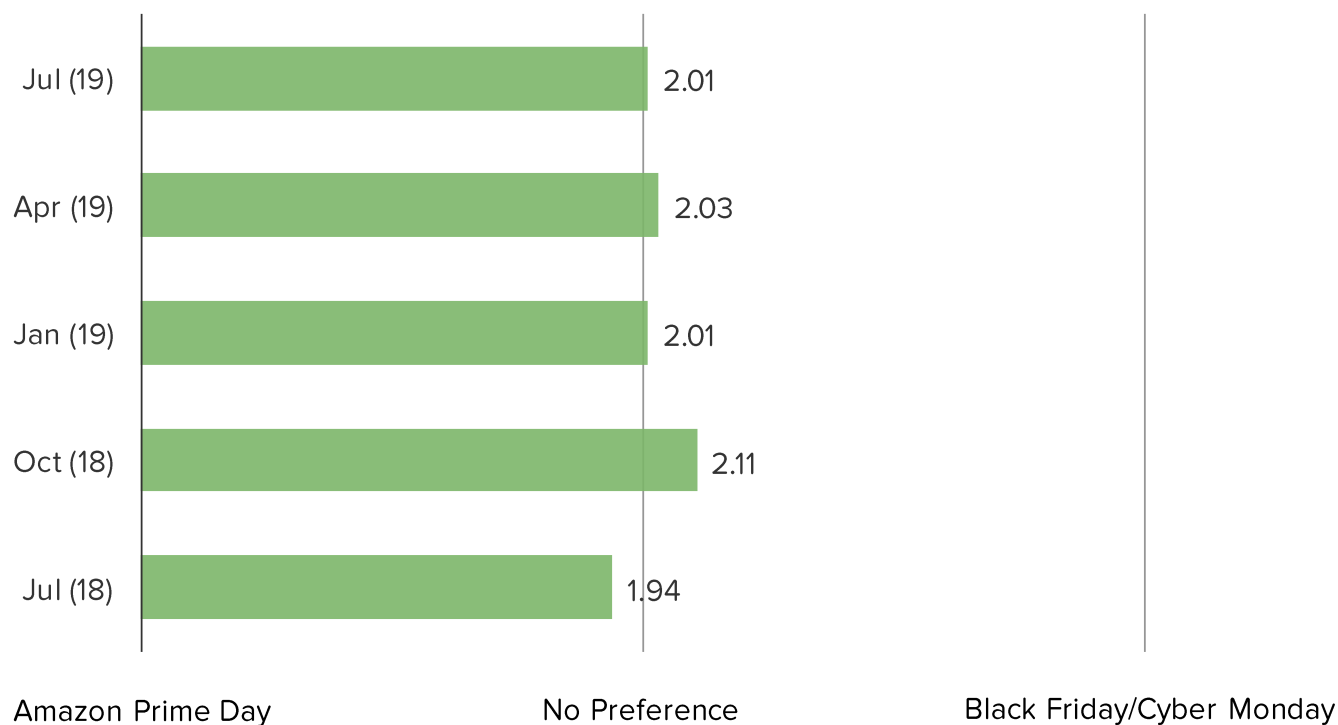
## AMAZON USERS - EXPECTED USAGE



# AMAZON USERS - ARE YOU AWARE OF WHAT AMAZON PRIME DAY IS?

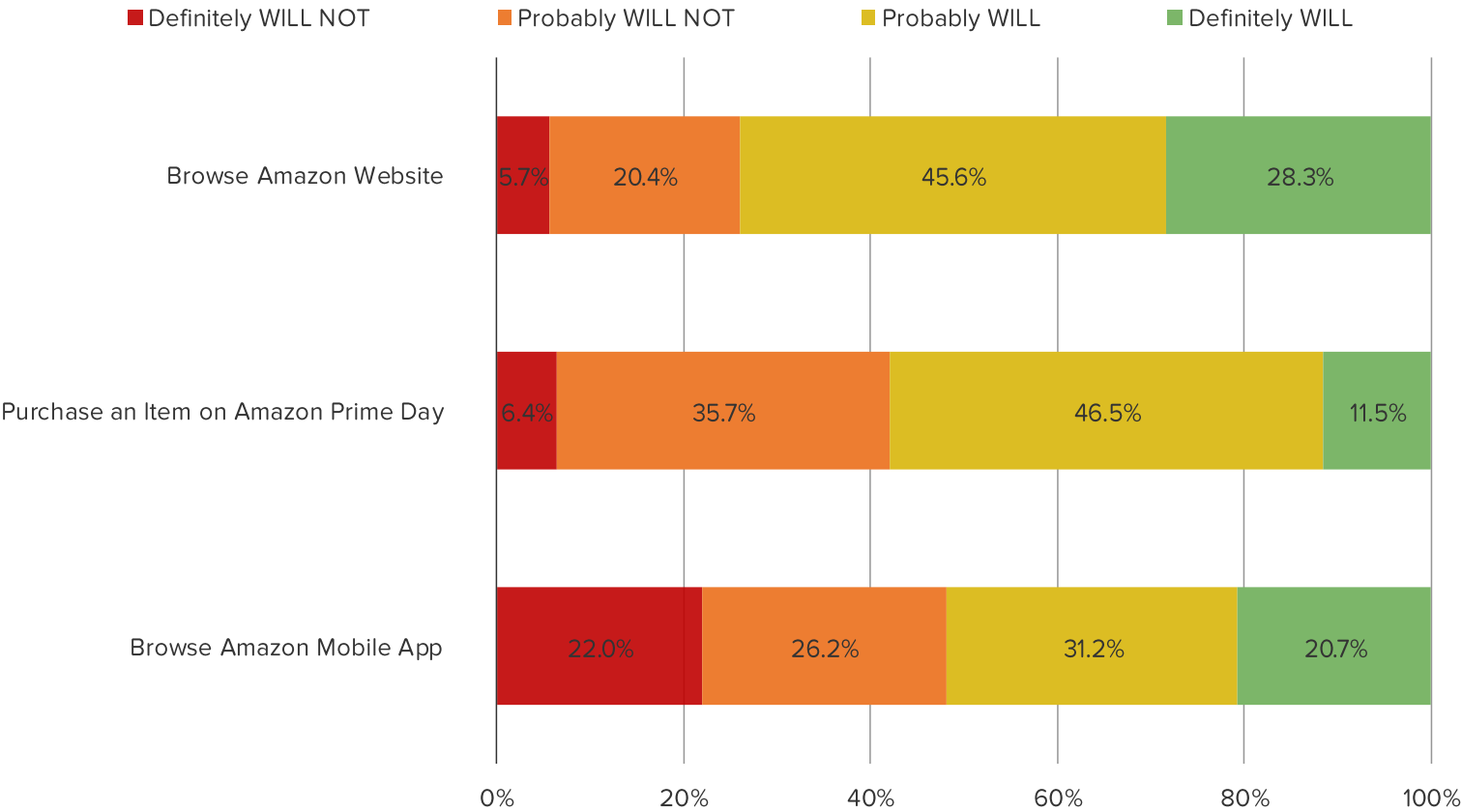


Among those who are aware: Which is better?





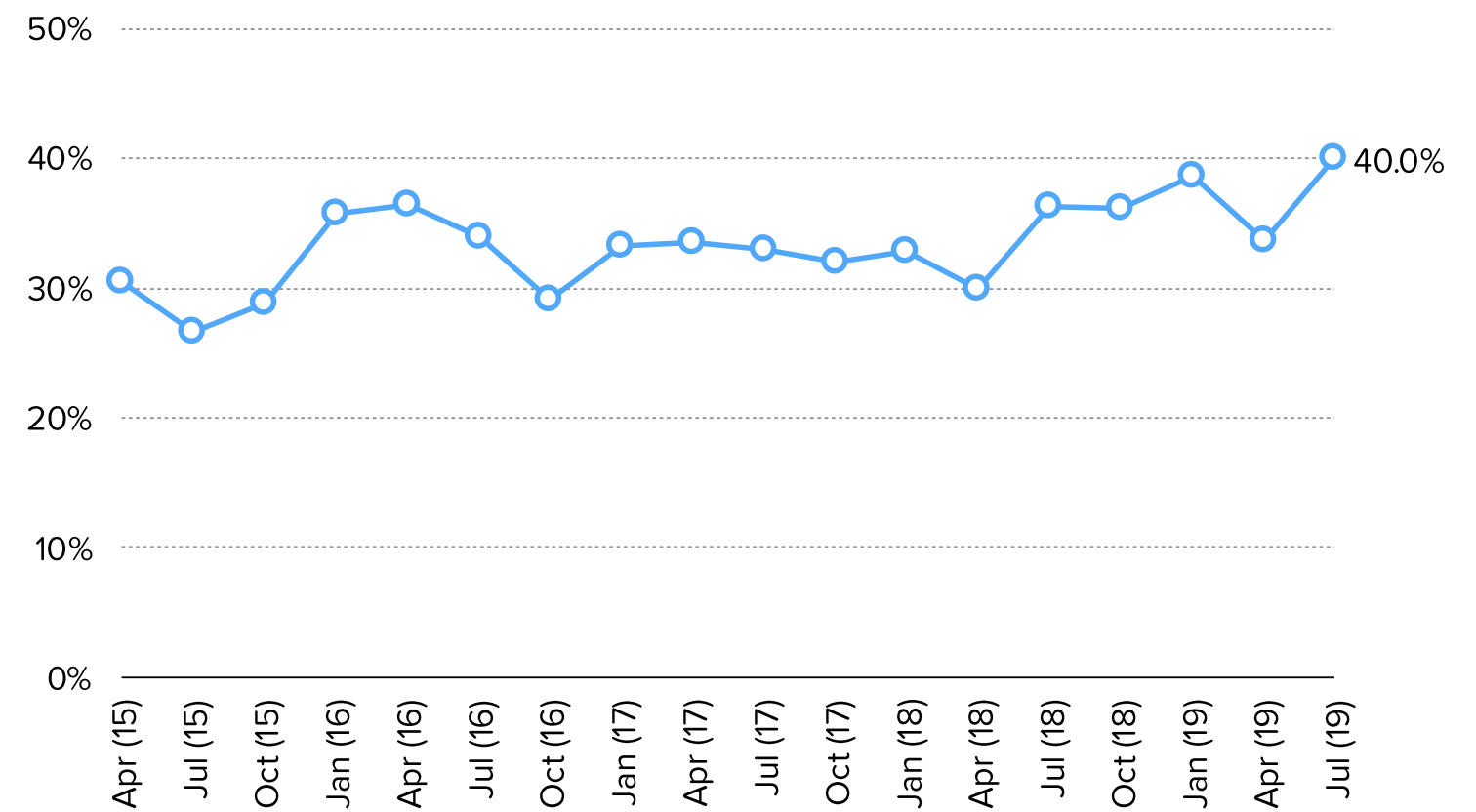
AMAZON USERS - ON PRIME DAY THIS YEAR (JULY 15<sup>TH</sup> AND 16<sup>TH</sup>) HOW LIKELY ARE YOU TO:



ETSY TRENDS

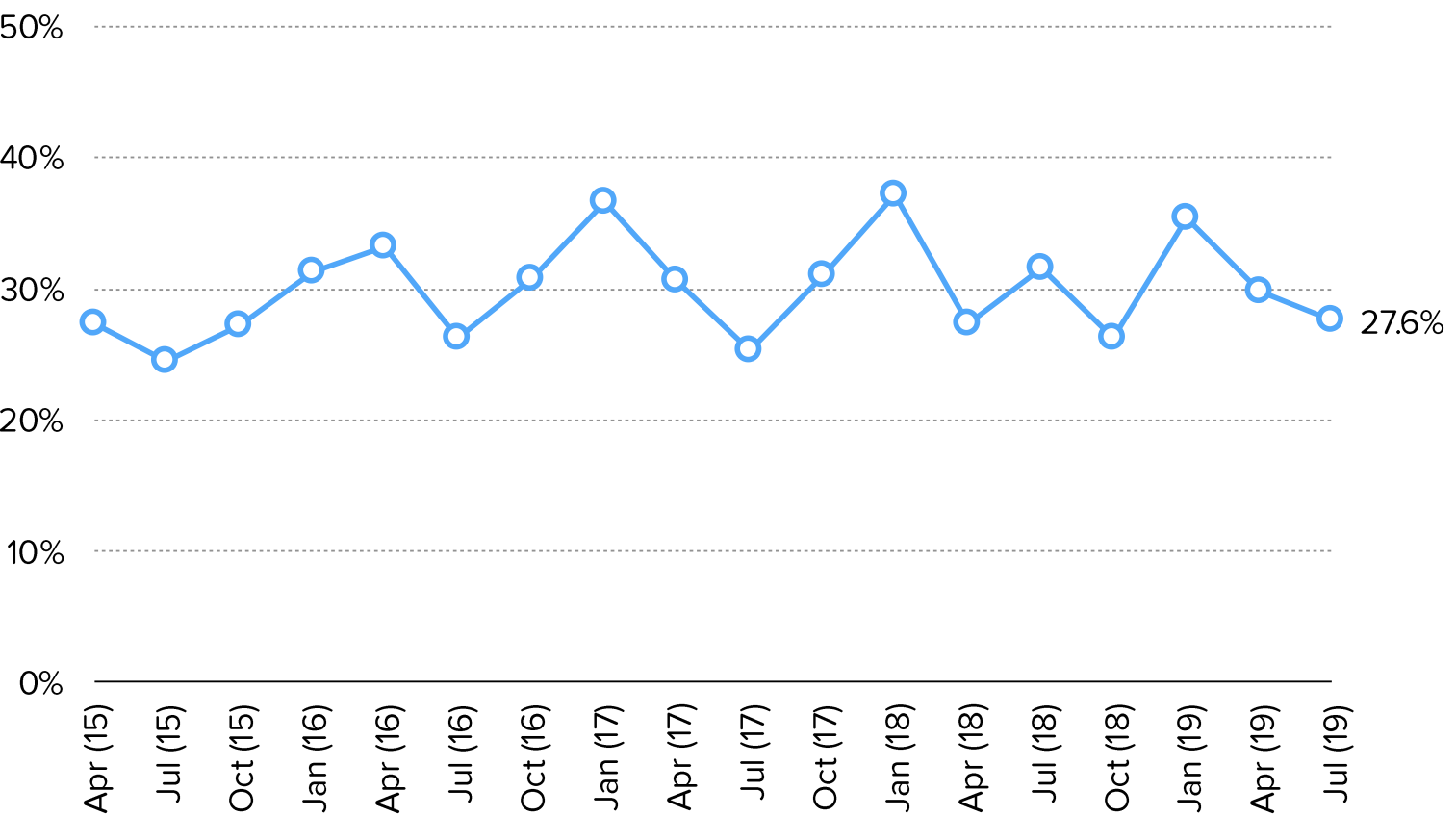
From Bricks To Clicks

ALL RESPONDENTS - DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

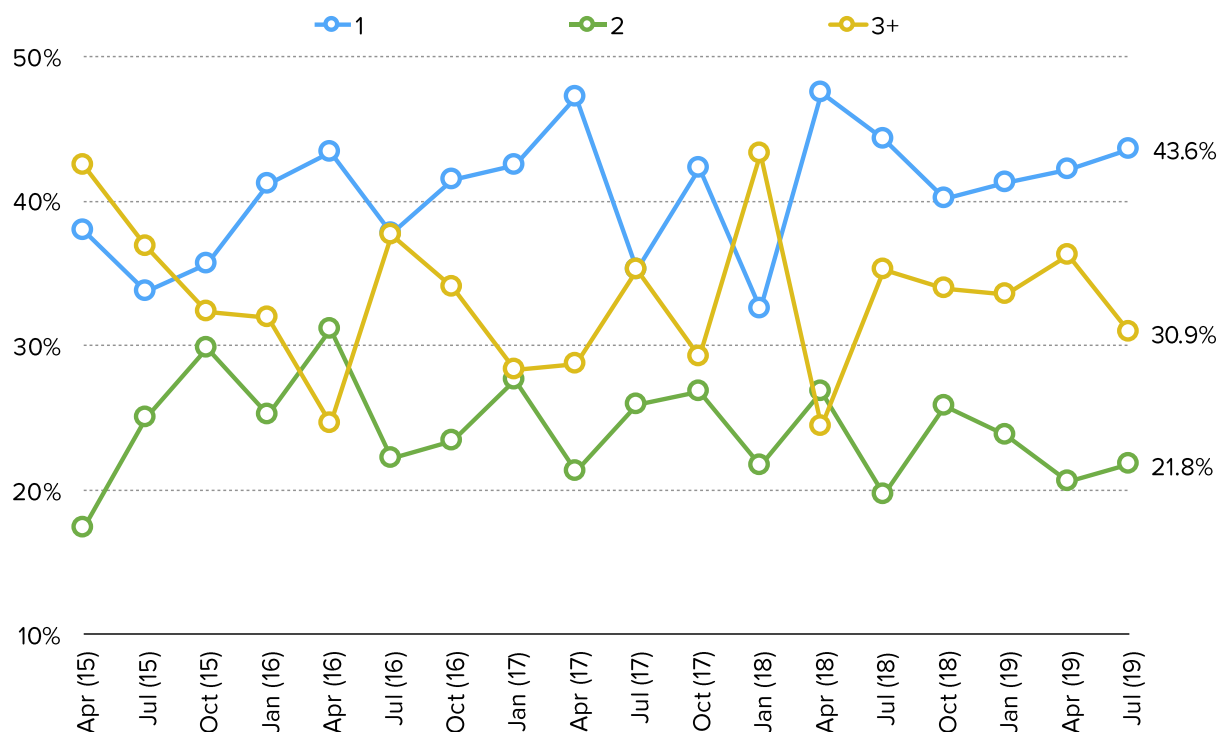


From Bricks To Clicks

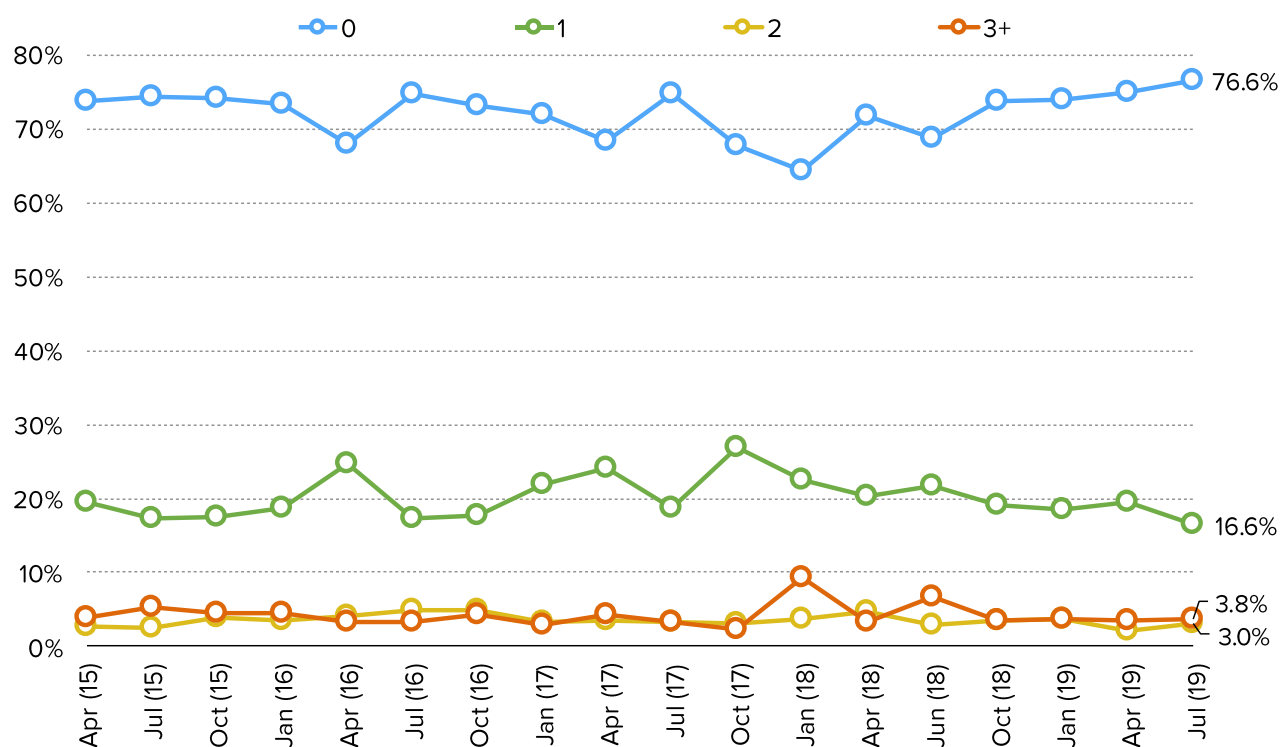
ETSY USERS - HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



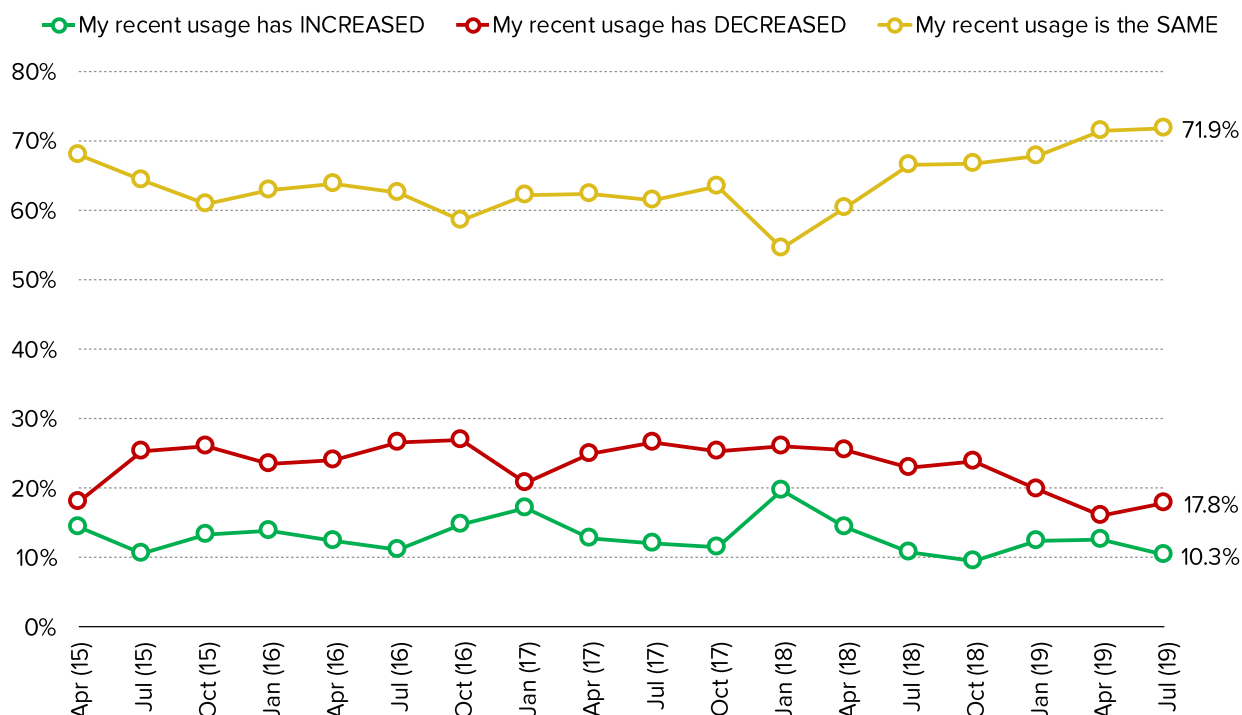
## PURCHASED THROUGH ETSY IN PAST THREE MONTHS - HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



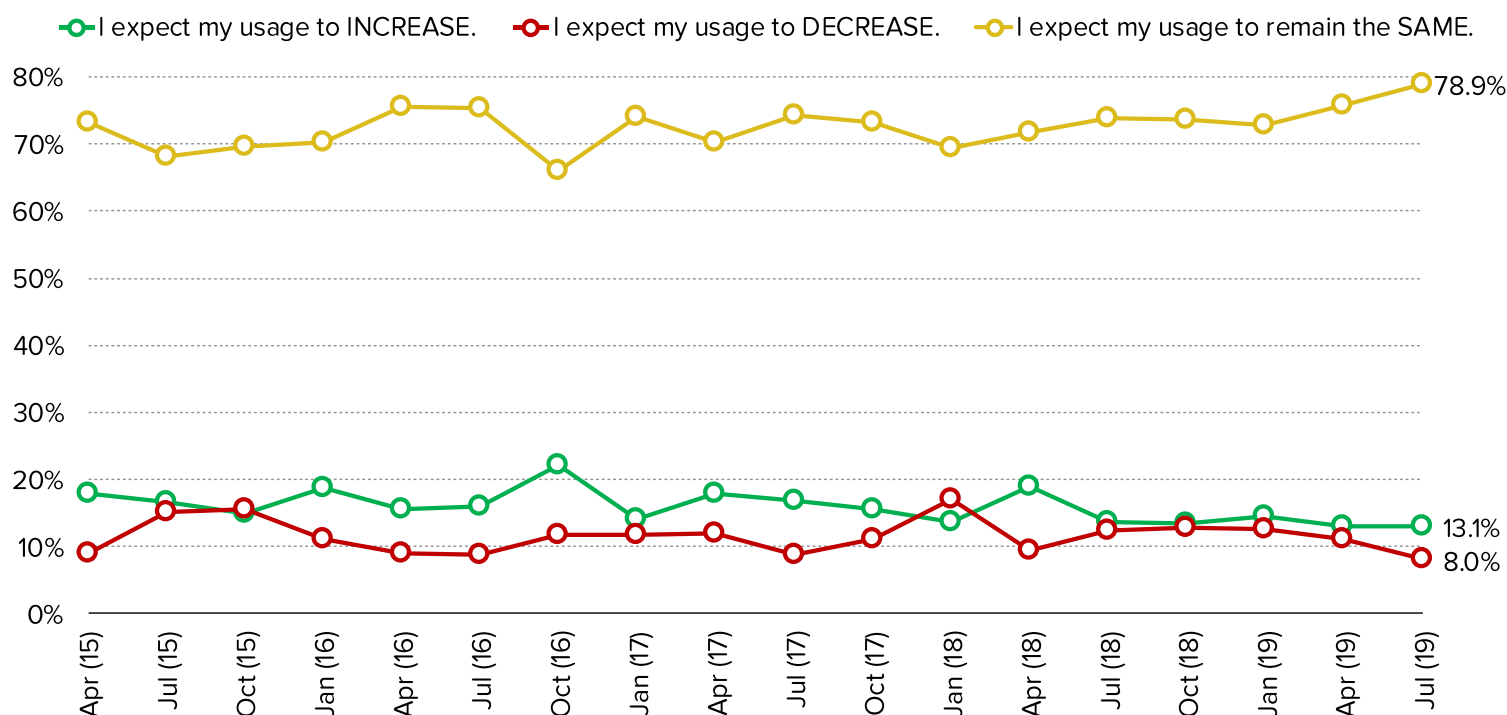
## ETSY USERS - ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH

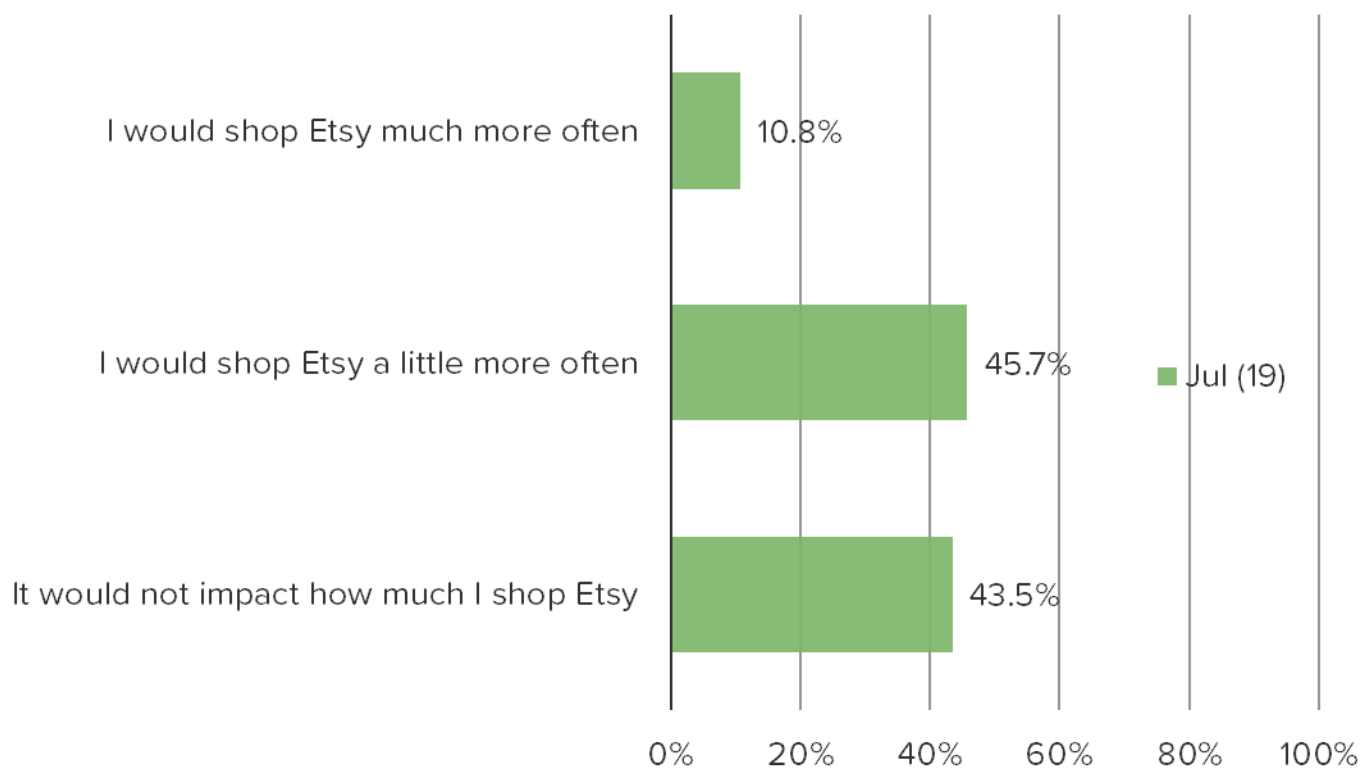


## ETSY USERS - RECENT USAGE

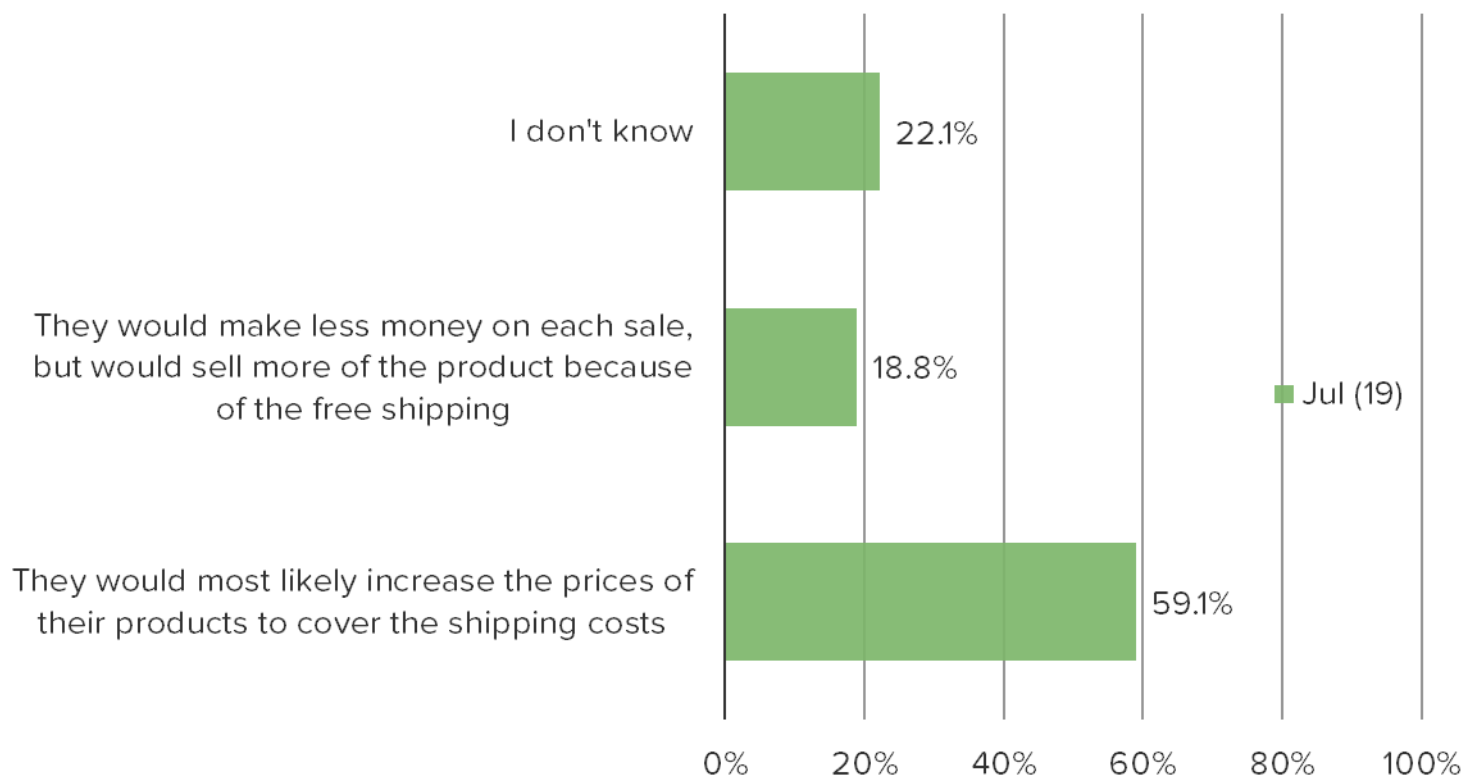


## ETSY USERS - EXPECTED USAGE



**ETSY USERS – WHICH OF THE FOLLOWING WOULD BE YOUR MOST LIKELY RESPONSE IF ETSY SELLERS BEGAN OFFERING FREE SHIPPING (OVER \$35)?**

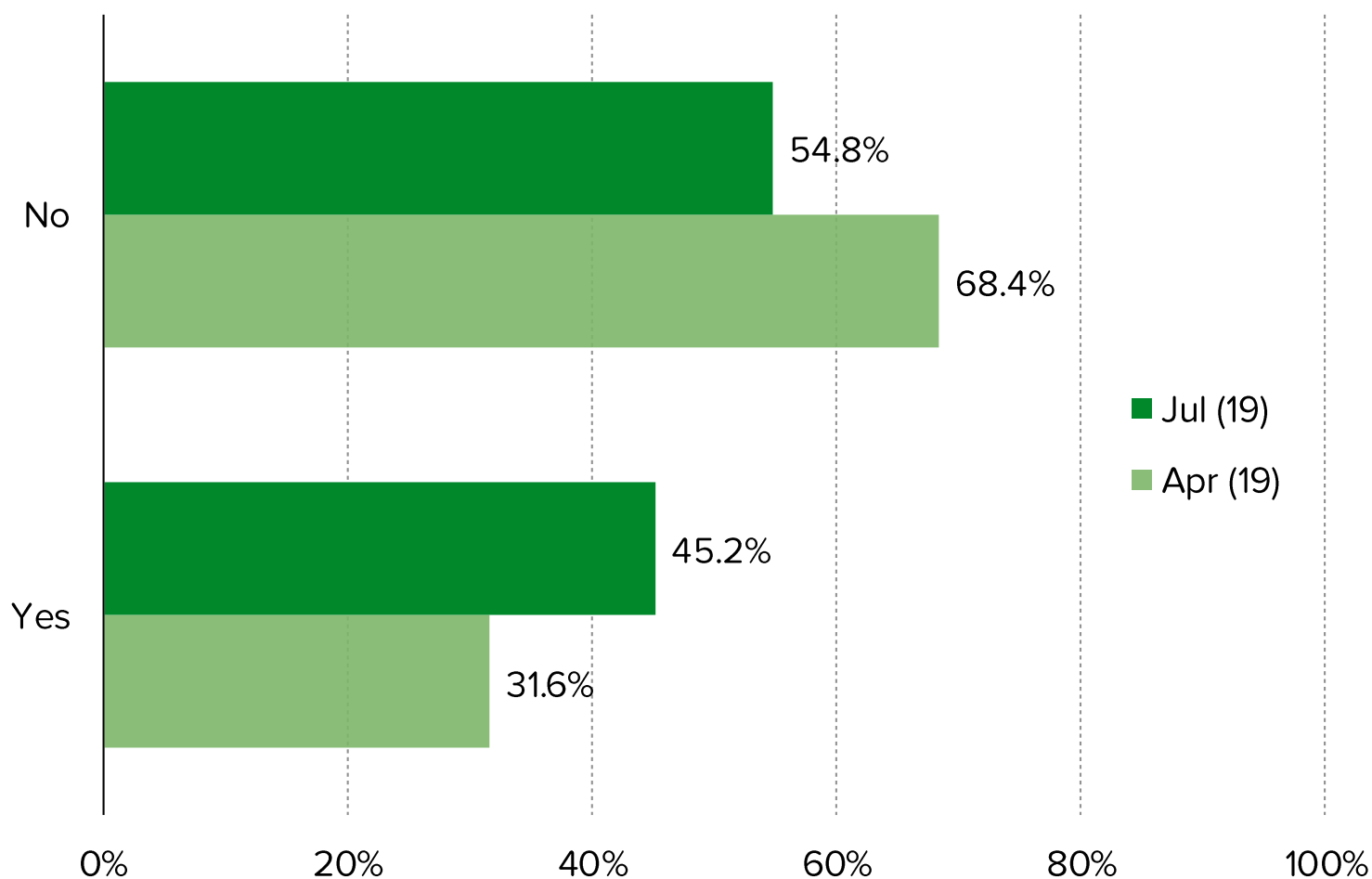
**ETSY USERS – HOW DO YOU THINK SELLERS WOULD MOST LIKELY BE ABLE TO OFFER FREE SHIPPING ON ITEMS ABOVE \$35 ON ETSY?**





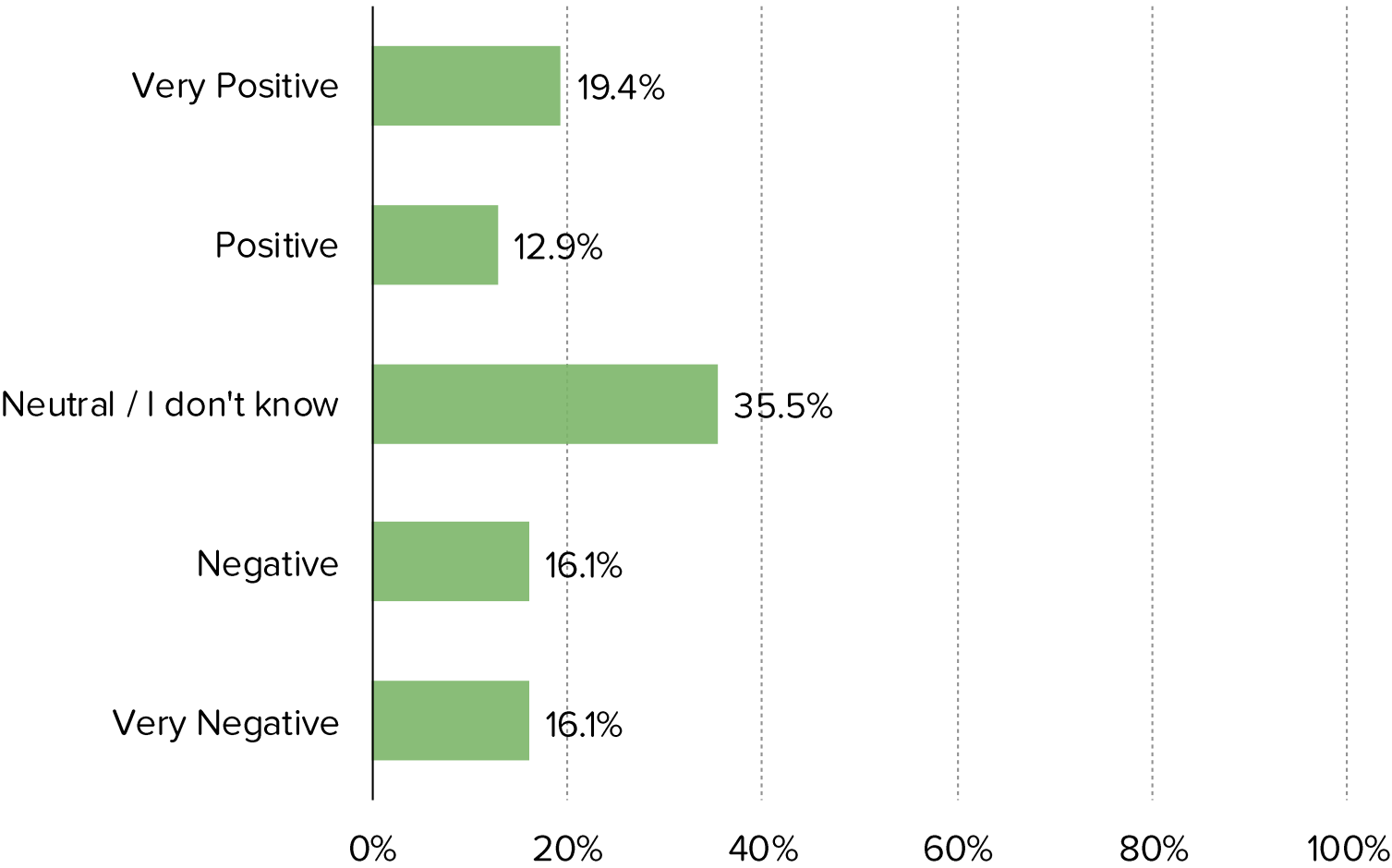
ETSY SELLERS

## ETSY SELLERS - ARE YOU ENROLLED IN ETSY PAYMENTS?



N = 31 respondents

ETSY SELLERS - ETSY ANNOUNCED THAT IT ENCOURAGES SELLERS TO OFFER FREE SHIPPING ON ORDERS \$35 AND OVER. WHAT IS YOUR OPINION?



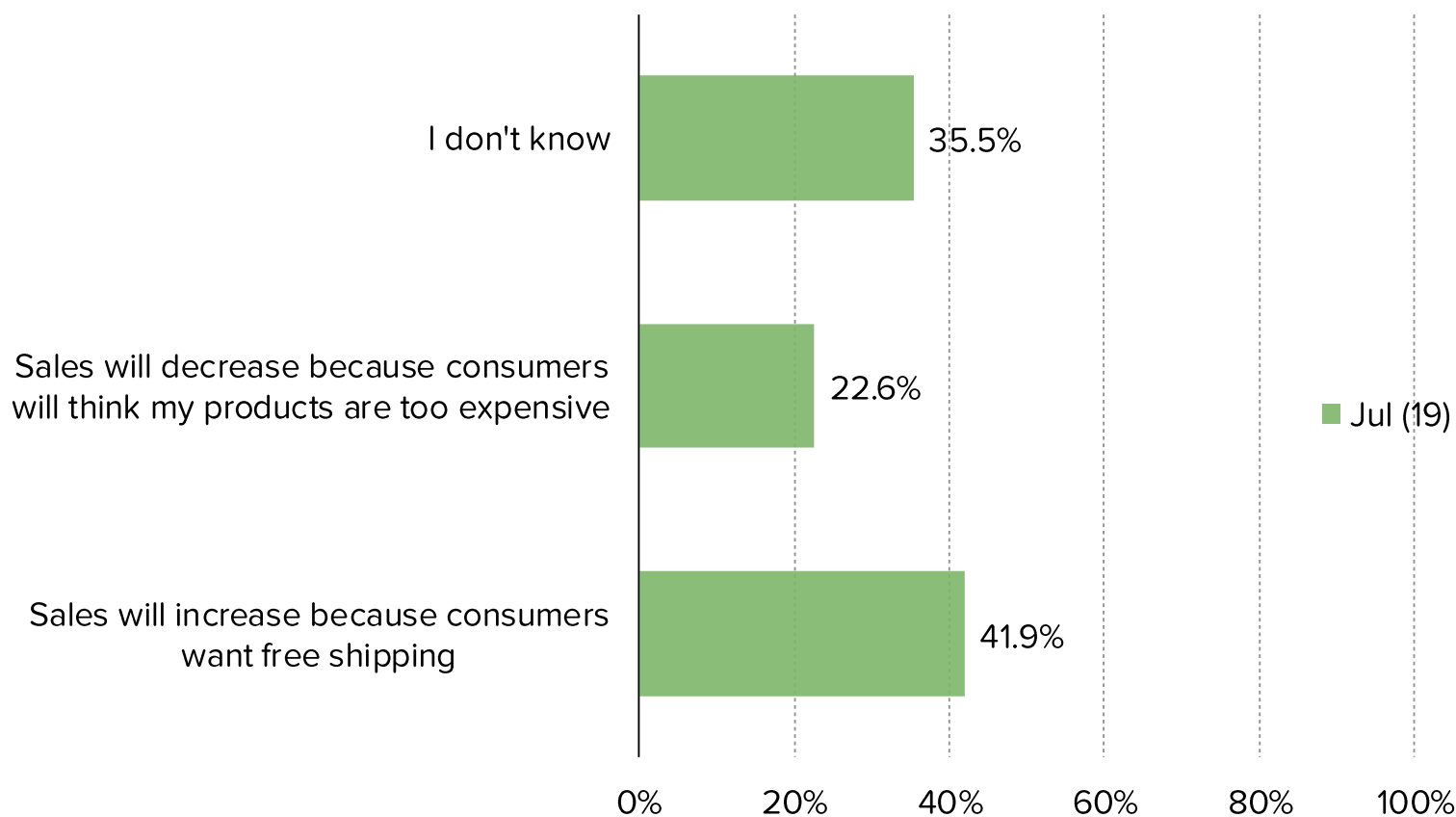
N = 31 respondents

**ETSY SELLERS - WHAT ARE YOU MOST LIKELY TO DO IN RESPONSE TO ETSY'S ENCOURAGING FREE SHIPPING BY PRIORITIZING SHOPS WHO OFFER IT?**



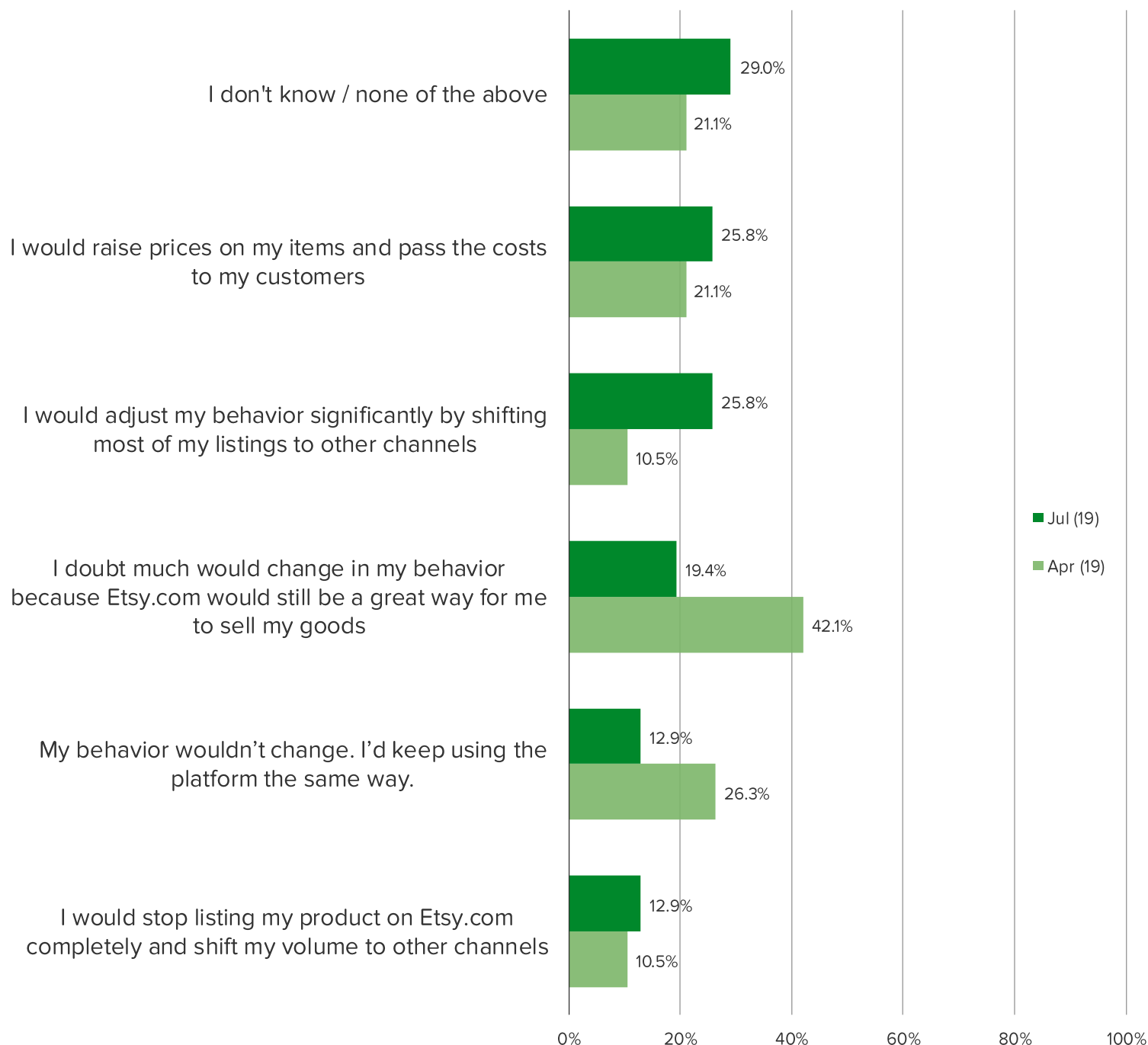
N = 31 respondents

**ETSY SELLERS - WHAT DO YOU THINK IS MORE LIKELY TO HAPPEN AS A RESULT OF ETSY ENCOURAGING SELLERS TO OFFER FREE SHIPPING?**



N = 31 respondents

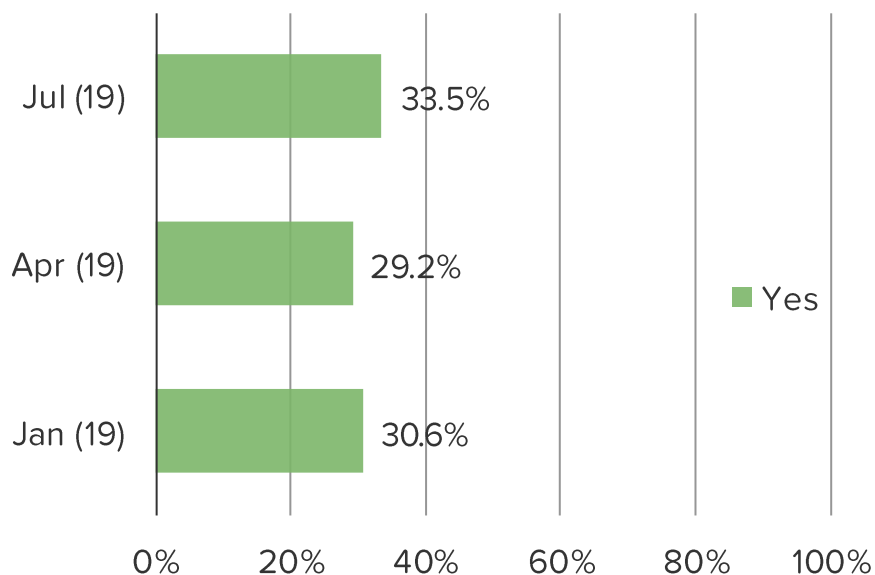
**ETSY SELLERS - IF THE FEES YOU HAVE TO PAY ON ETSY SALES INCREASED, WOULD YOU ADJUST HOW MUCH YOU USE THE WEBSITE?**



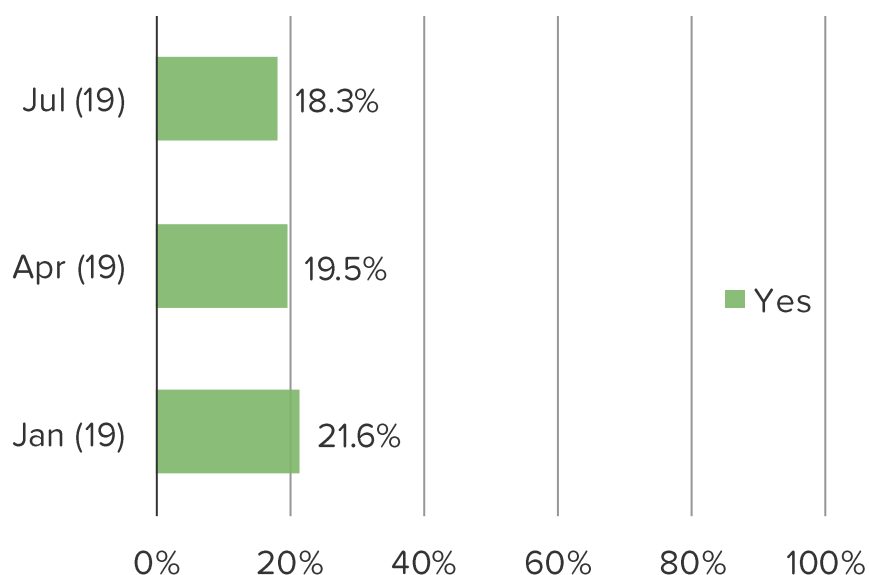
N = 31 respondents

WAYFAIR TRENDS

**ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?**

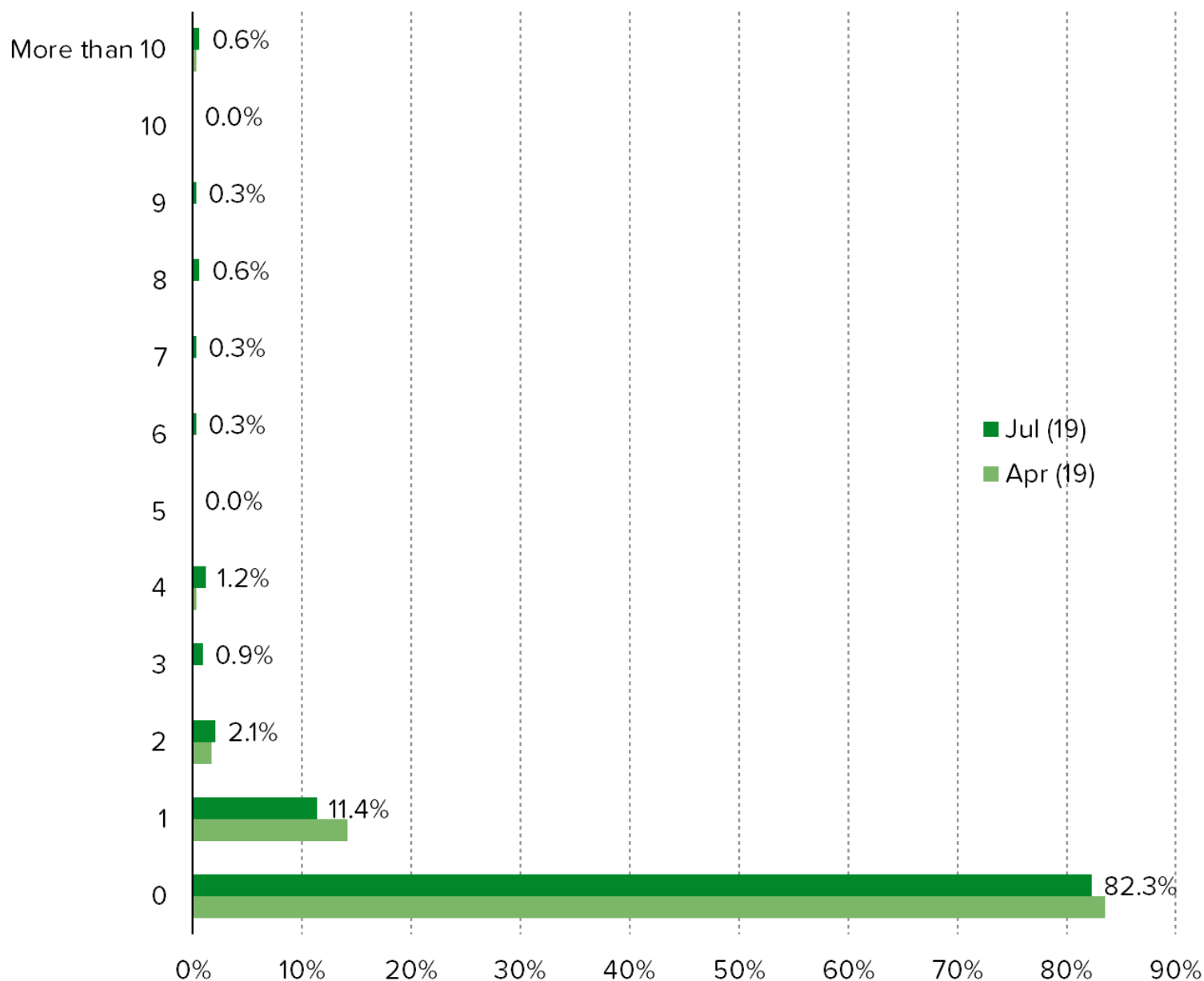


**WAYFAIR USERS - HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?**

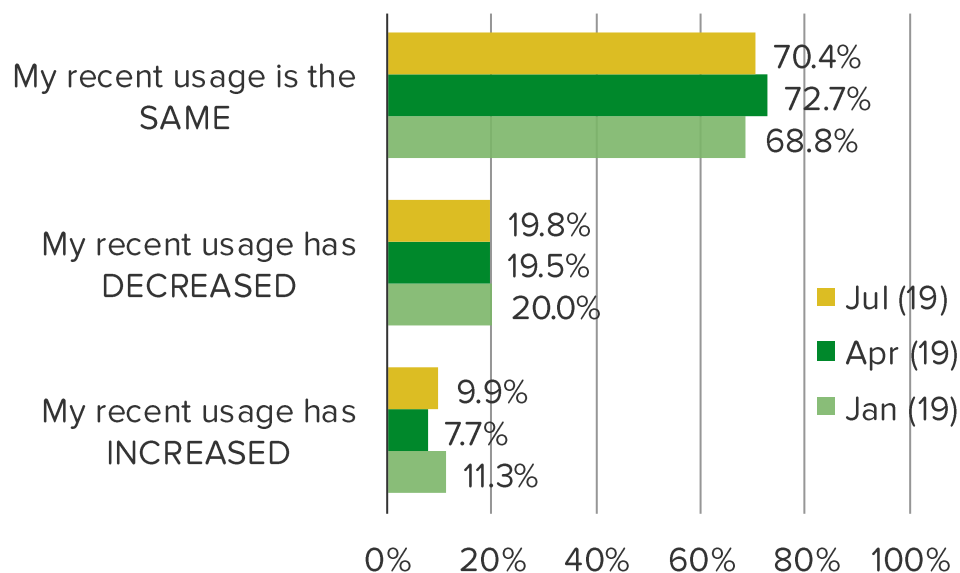




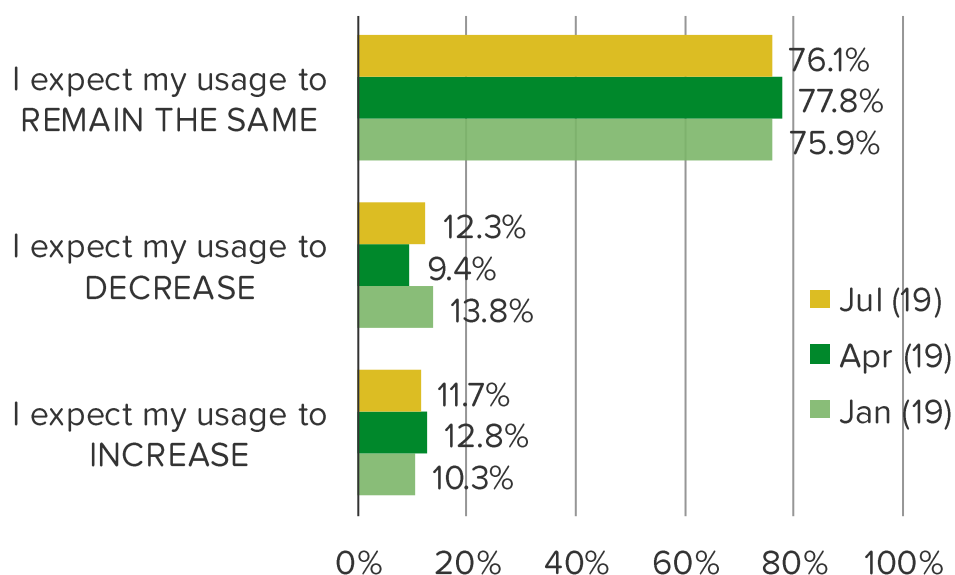
**ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?**



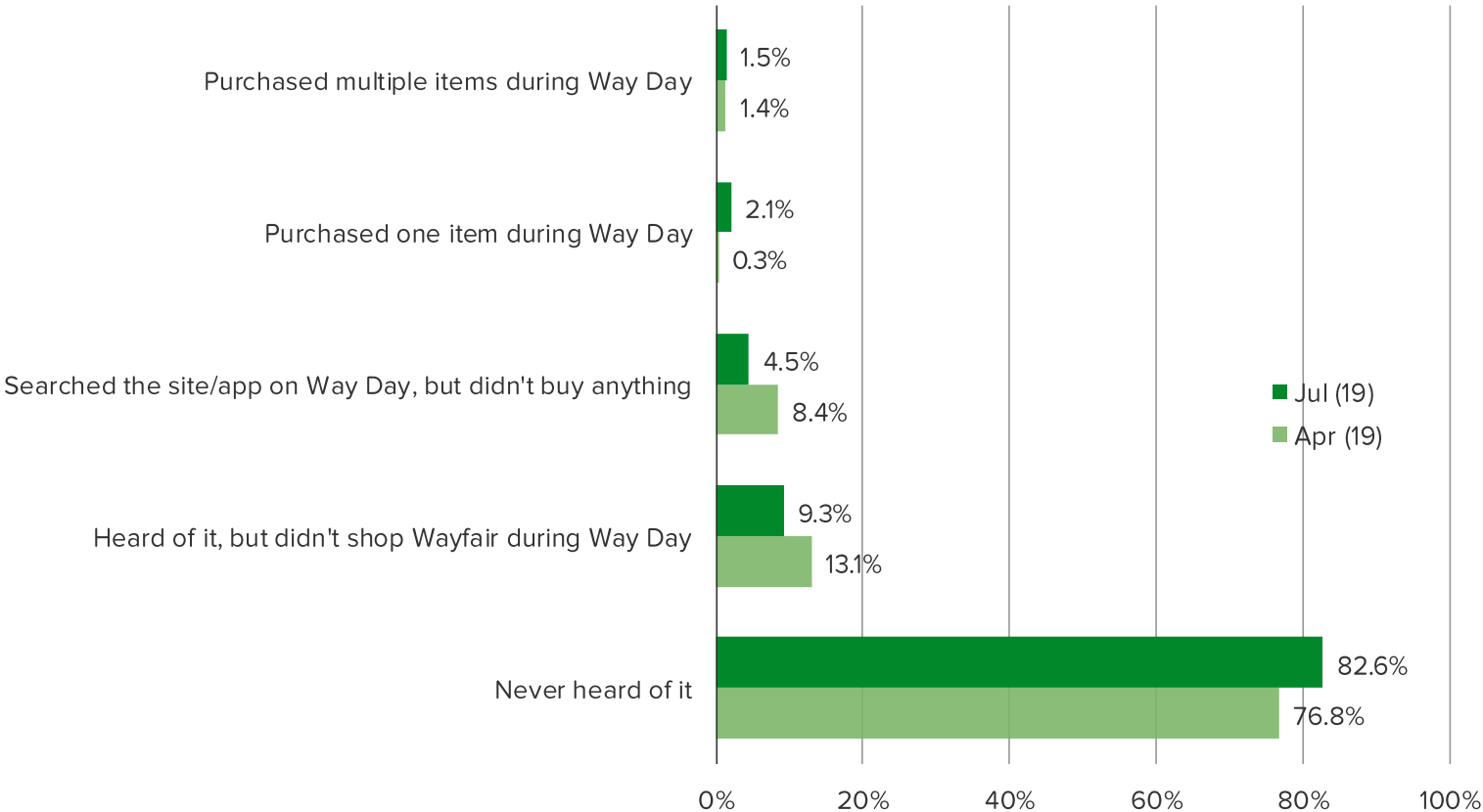
## WAYFAIR USERS - RECENT USAGE



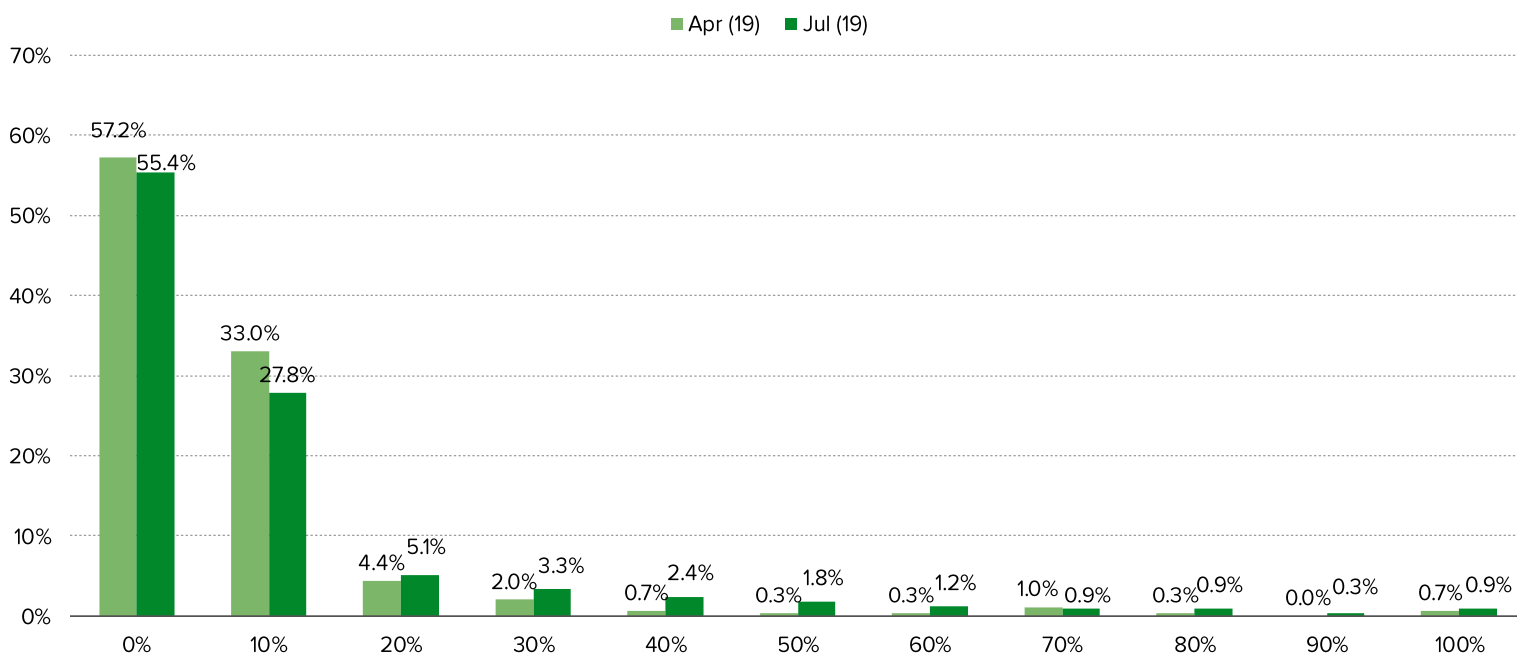
## WAYFAIR USERS - EXPECTED USAGE



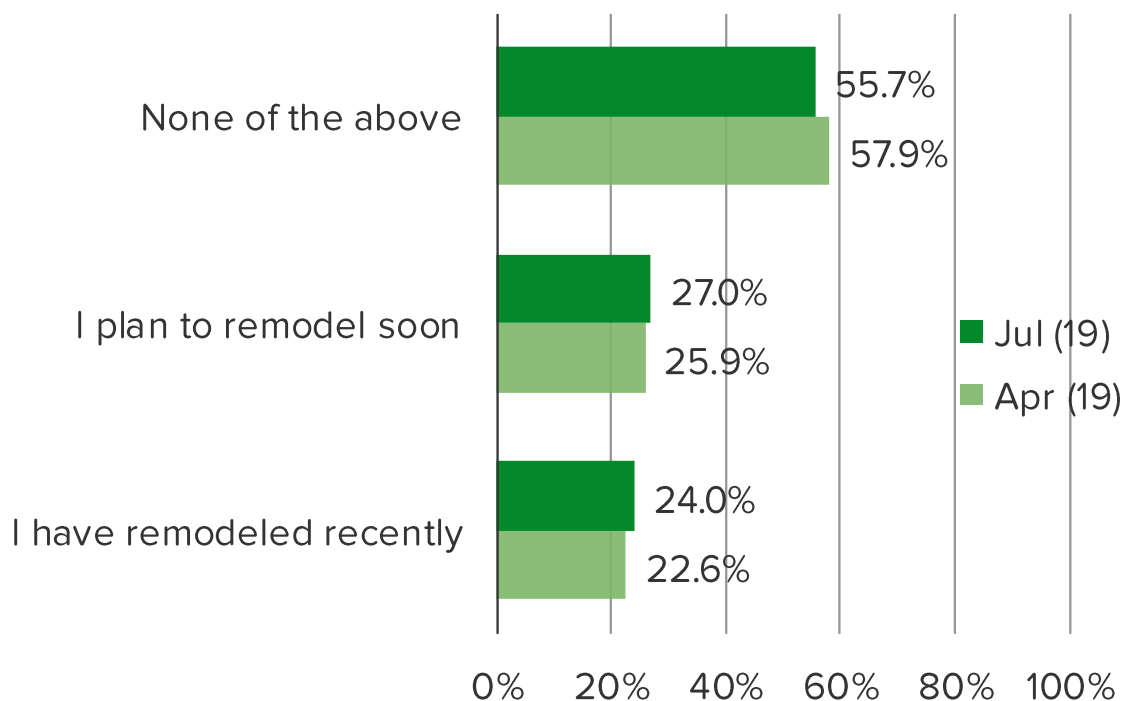
WAYFAIR USERS – EXPERIENCE WITH WAY DAY THIS YEAR (36 HOUR WAYFAIR ONLINE SALES EVENT THAT STARTED APRIL 10, 2019)



## WAYFAIR USERS - WHAT PERCENTAGE OF YOUR TOTAL FURNITURE AND HOME FURNISHINGS PURCHASES DO YOU MAKE THROUGH WAYFAIR?

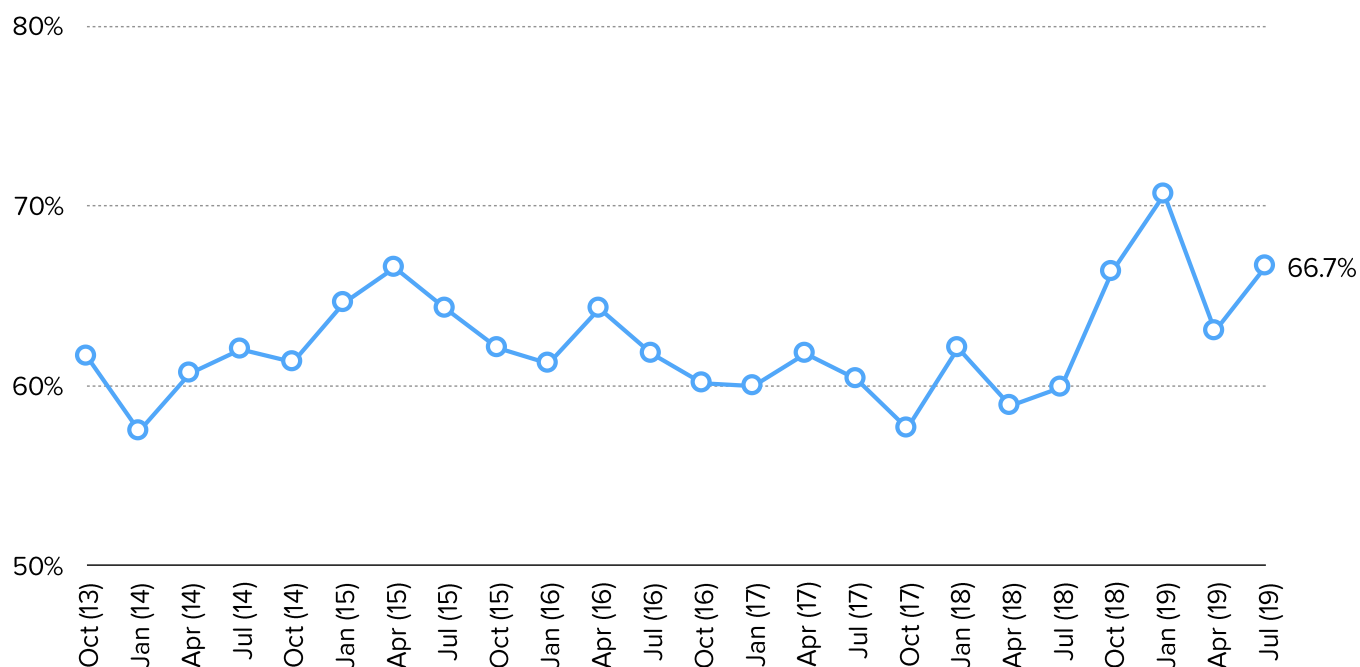


## WAYFAIR USERS - CHECK ALL THAT APPLY TO YOU:

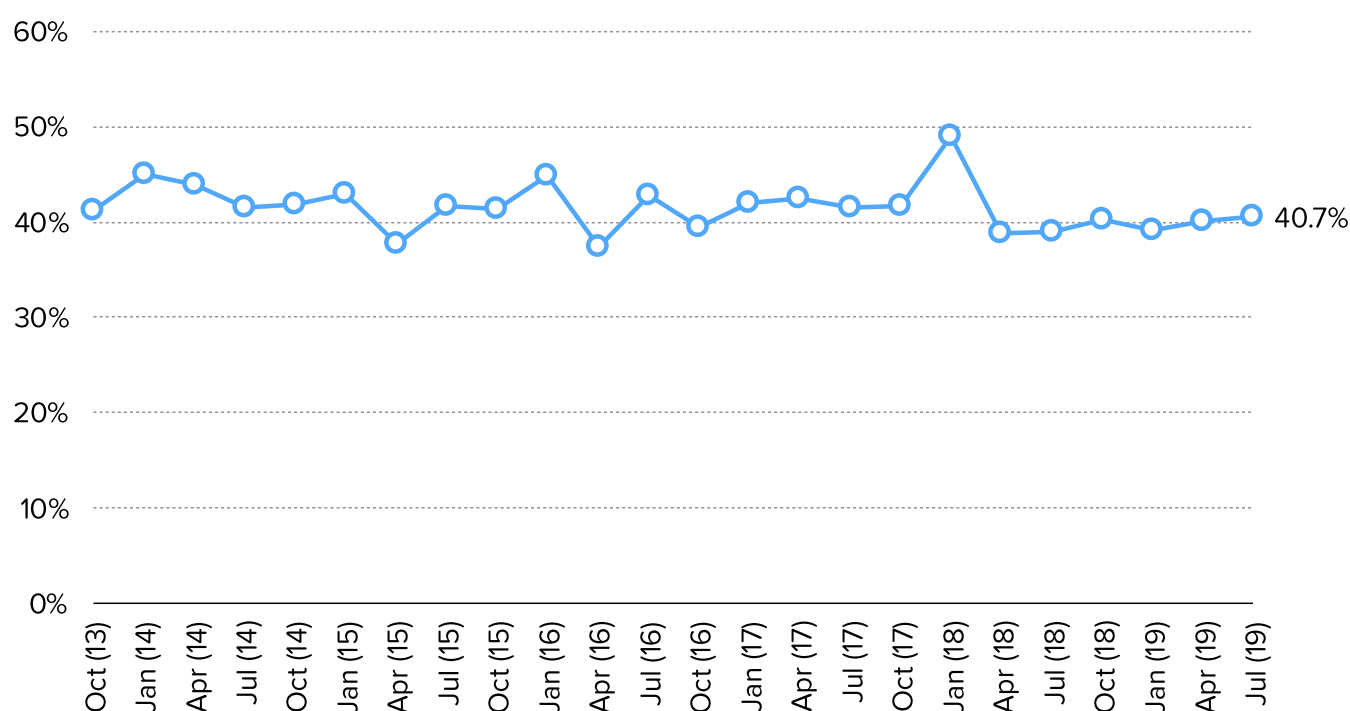


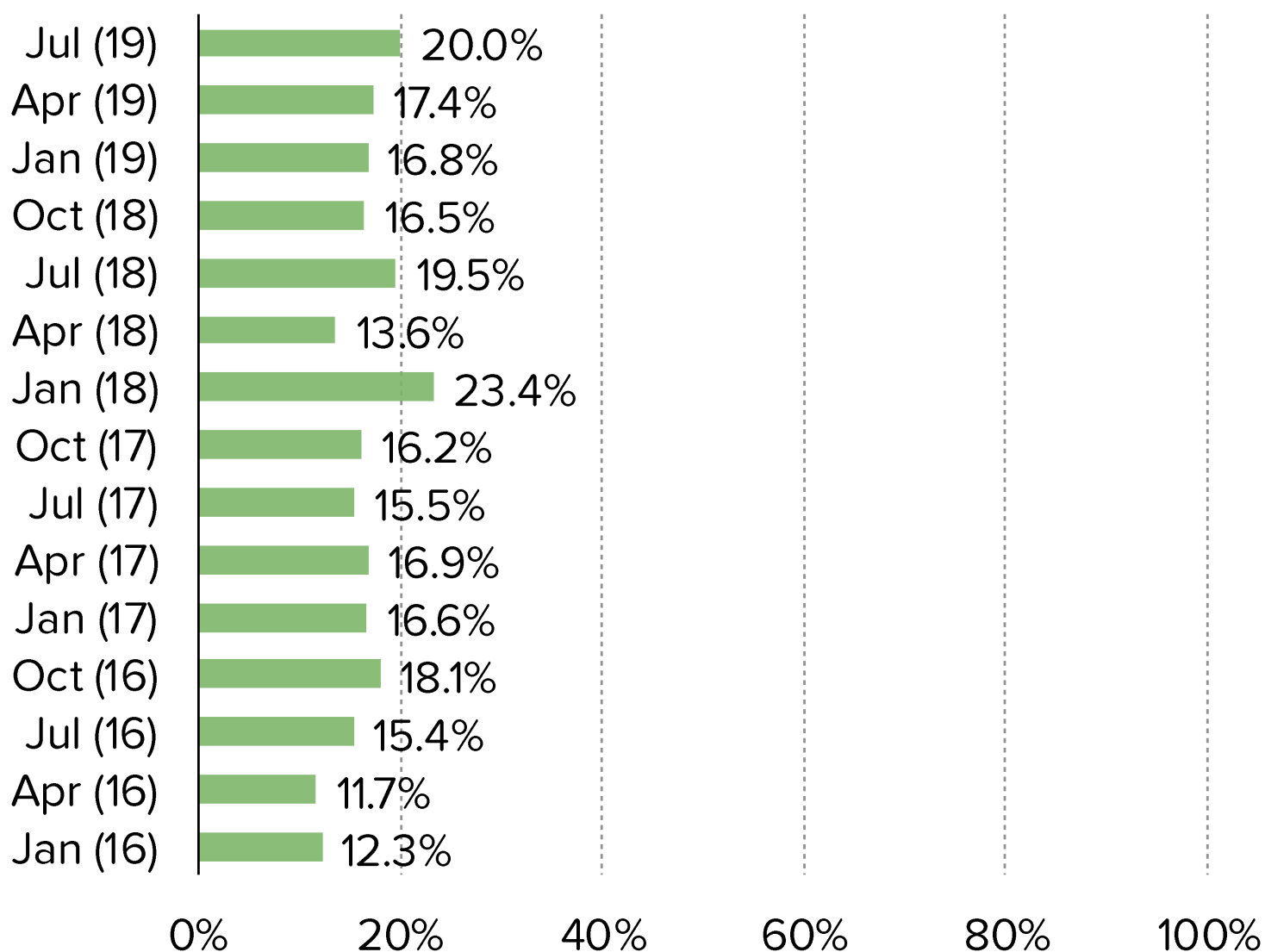
# EBAY TRENDS

## DO YOU EVER USE OR VISIT EBAY?

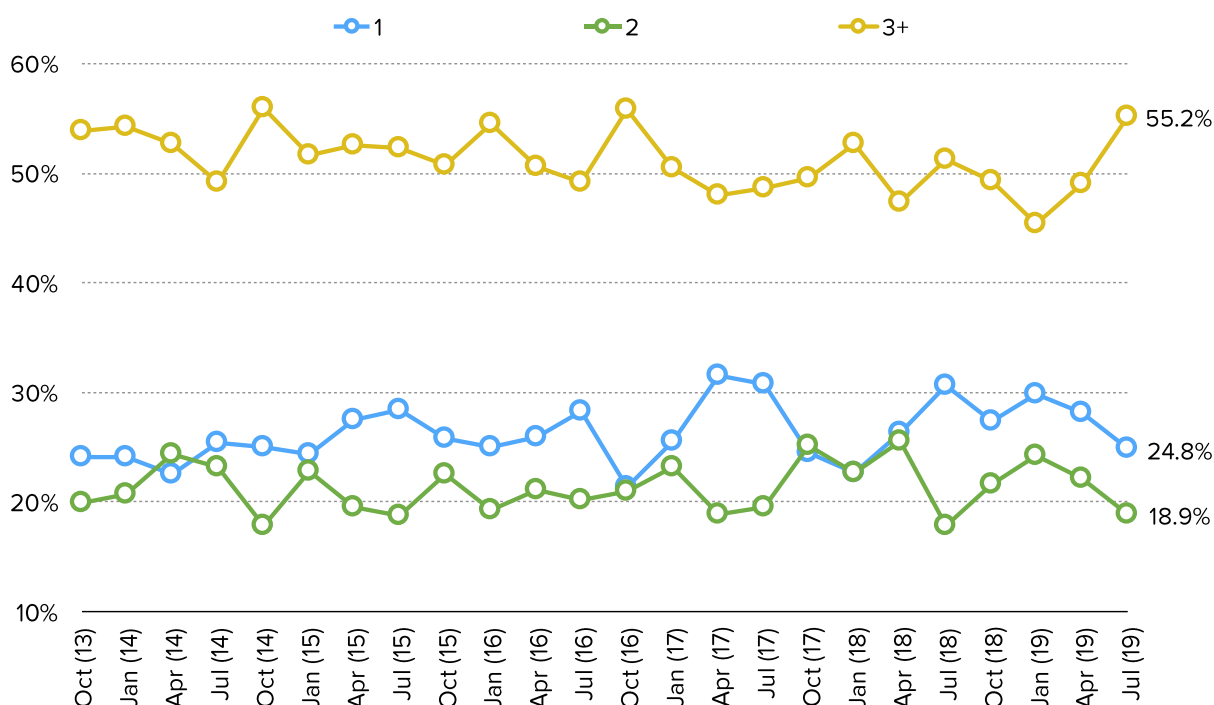


## EBAY USERS - PURCHASED ITEM(S) DURING THE PAST THREE MONTHS

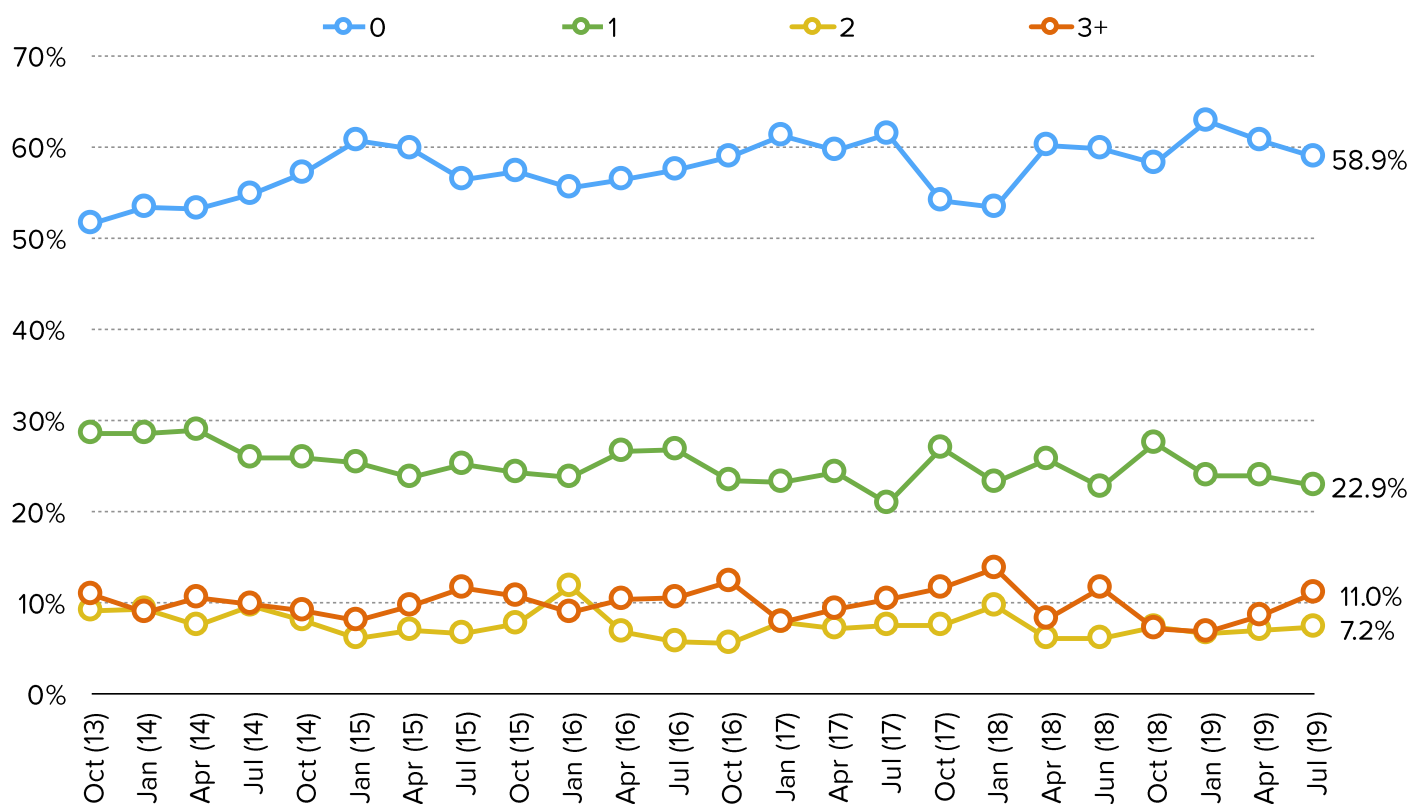


**HAVE YOU PURCHASED ANY ITEMS ON THE EBAY MOBILE APP DURING THE PAST THREE MONTHS?**

## EBAY USERS - HOW MANY ITEMS HAVE YOU PURCHASED THROUGH EBAY IN THE LAST THREE MONTHS?

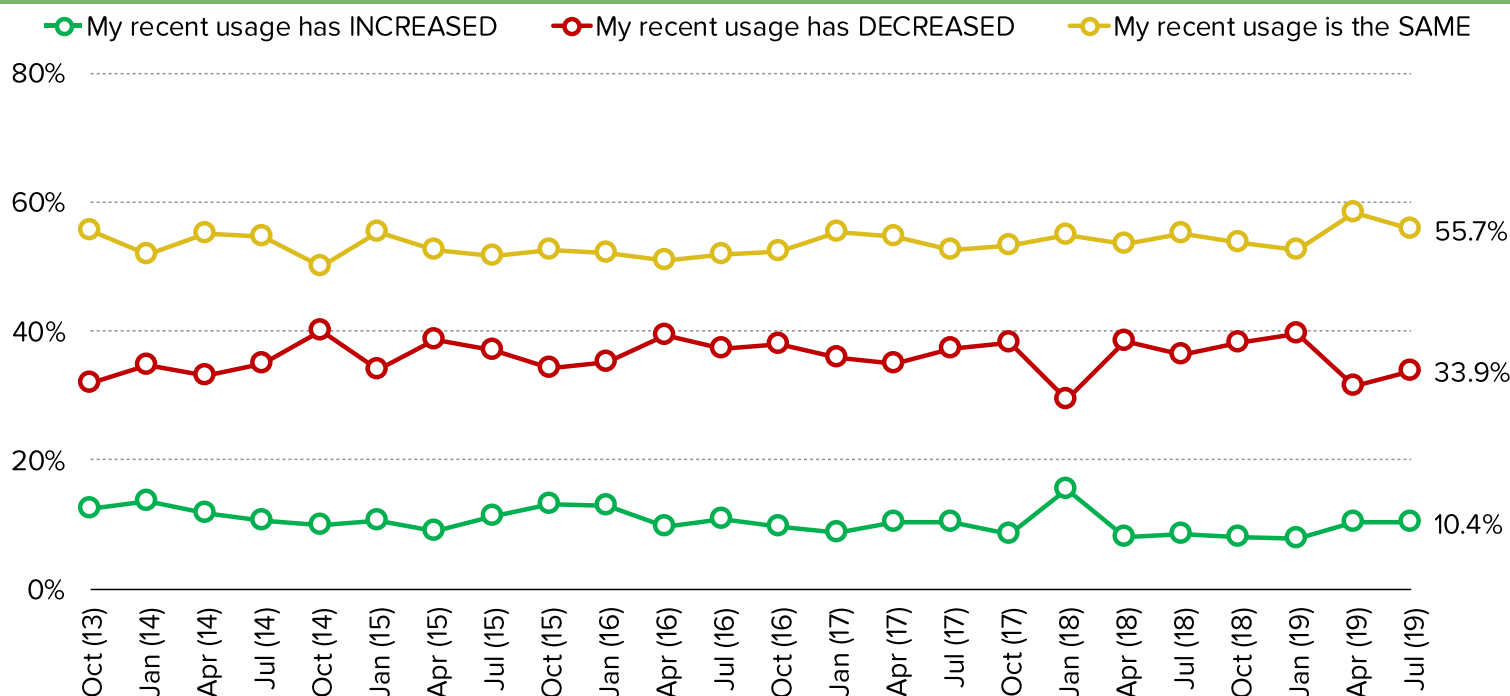


## EBAY USERS - ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH EBAY PER MONTH?

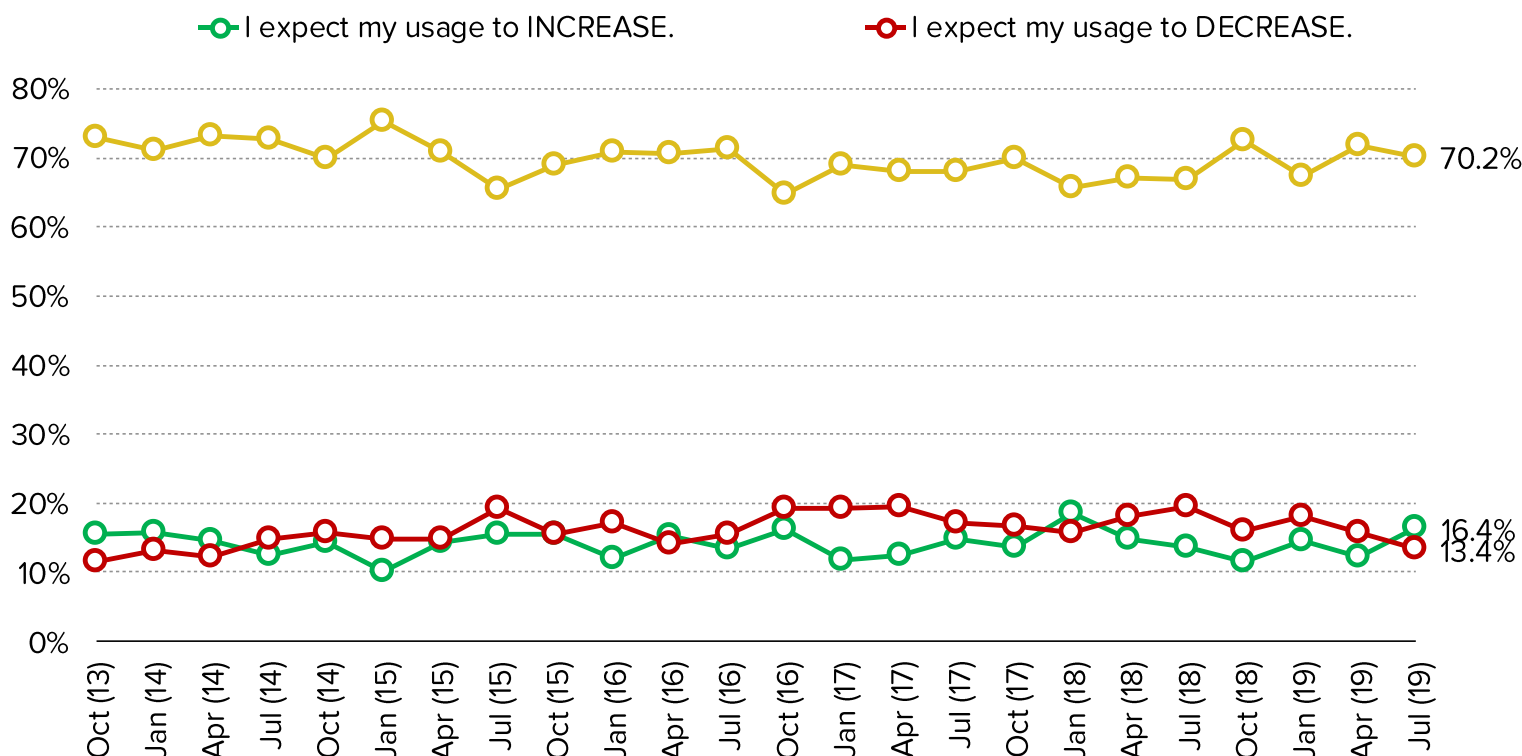




## EBAY USERS - HOW WOULD YOU DESCRIBE YOUR RECENT USAGE OF EBAY?

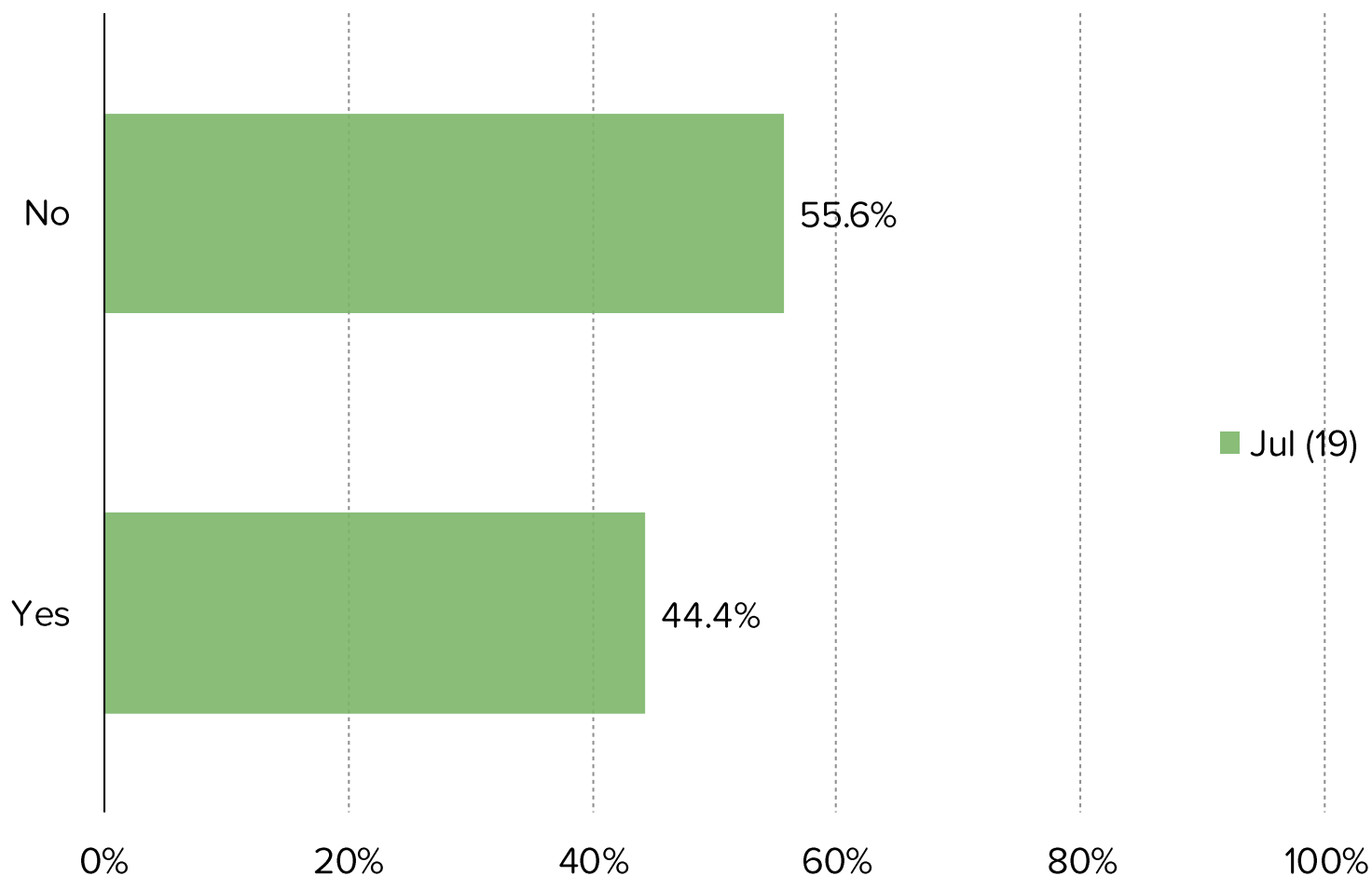


## EBAY USERS - HOW WOULD YOU DESCRIBE YOUR EXPECTED USAGE OF EBAY IN THE FUTURE?

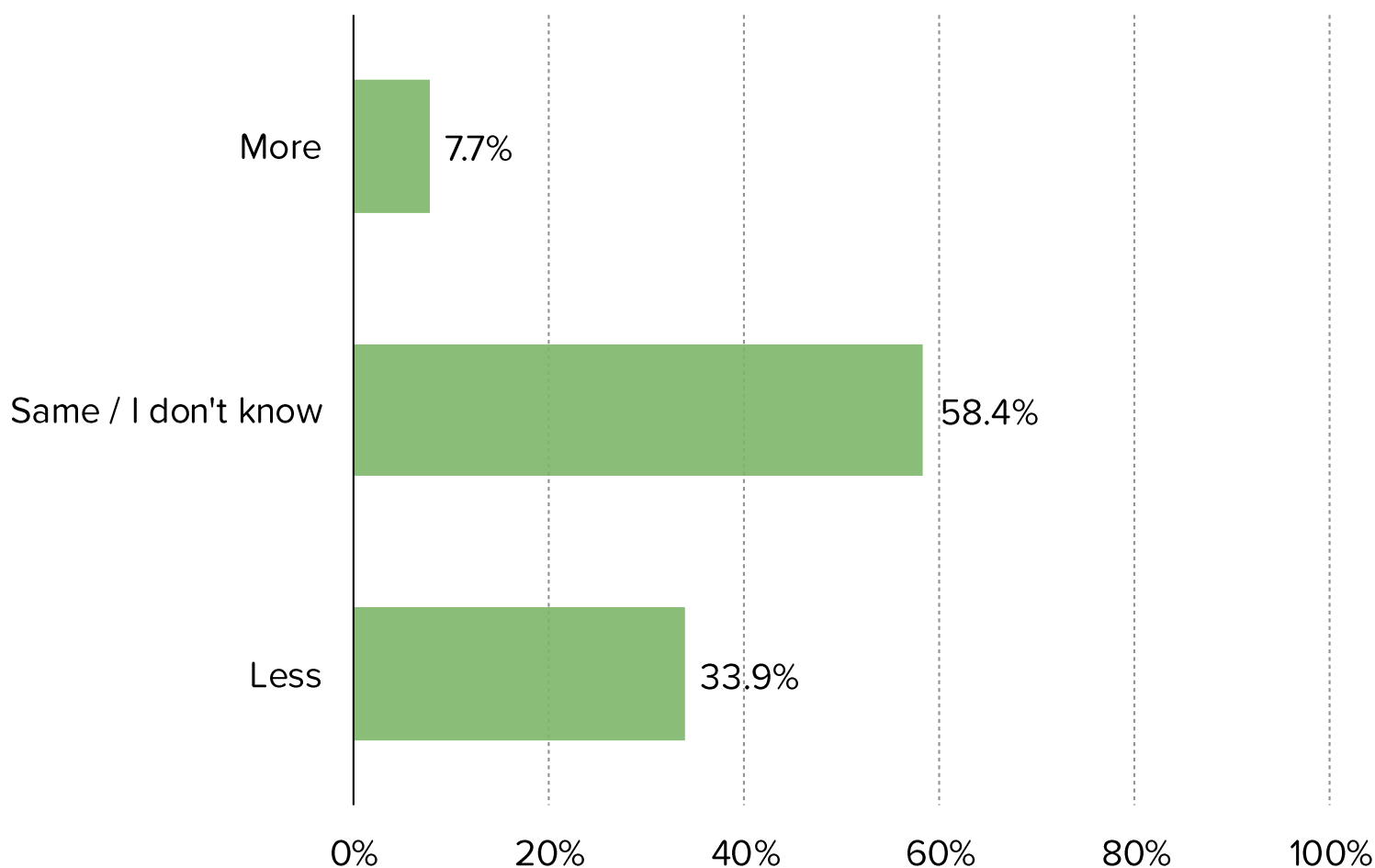


GRPN TRENDS

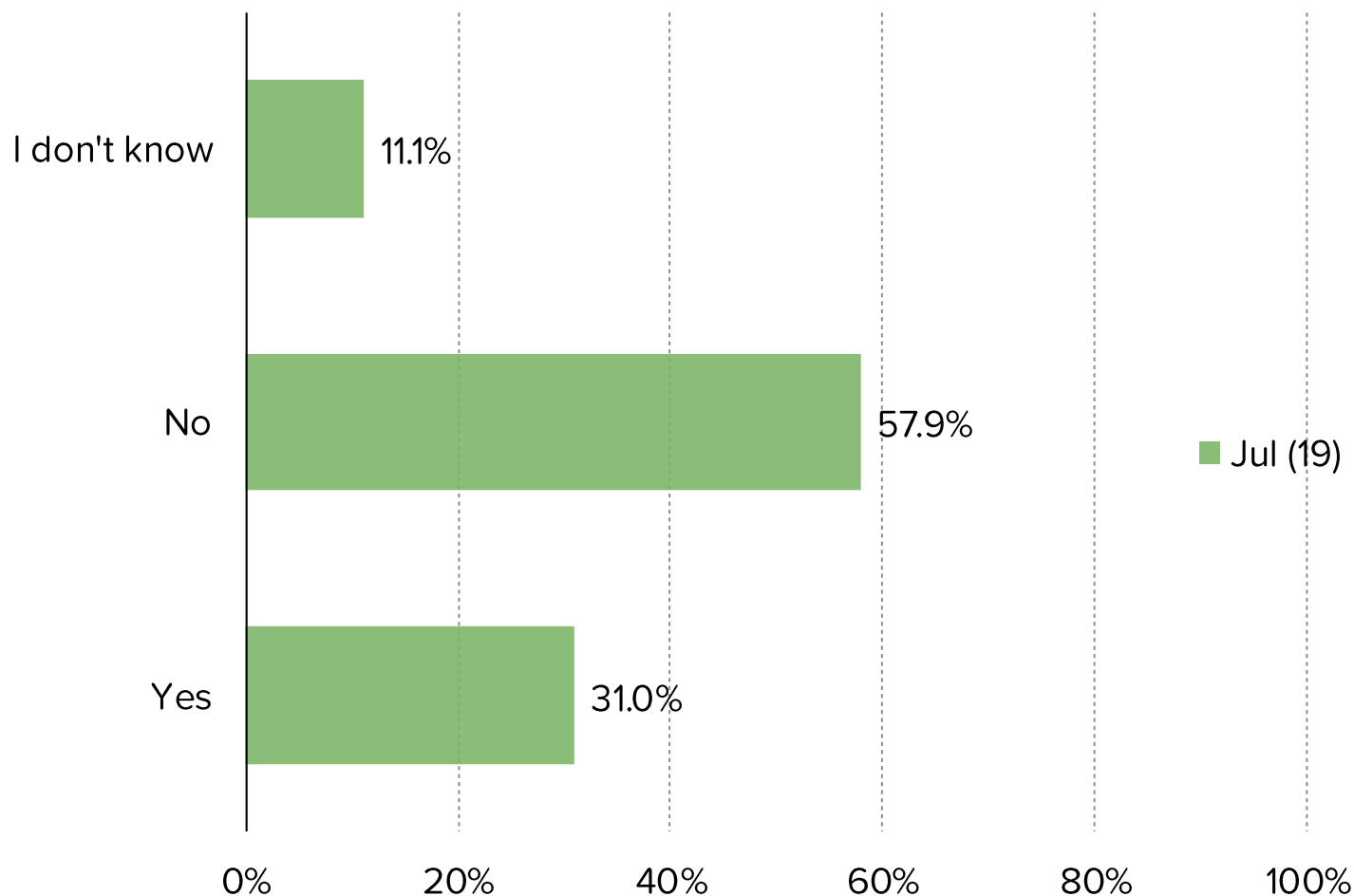
**DO YOU USE OR VISIT GROUPON?**



**GRPN USERS - DO YOU FIND THAT YOU HAVE BEEN SPENDING MORE OR LESS PER PURCHASE THROUGH Groupon THAN YOU USED TO?**



**GRPN USERS - DO YOU HAVE YOUR CREDIT CARD LINKED TO YOUR GROUPON ACCOUNT?**



**GRPN USERS - IN YOUR OPINION, IS THE GROUPON EXPERIENCE BETTER OR WORSE WITH CREDIT CARD LINKING (AS OPPOSED TO PRESENTING VOUCHERS)**

