

BESPOKE SURVEYS

## Online Retailers US Vol 38

1000+ US Consumers Balanced to Census

**CHECK BREAKDOWN:****SPENDING CONFIDENCE**

Confidence in spending money has continued to slip this year.

**FURNITURE, ECOMMERCE, AND HOME DEPOT / TARGET COMPETITION**

Respondents who have bought furniture from a range of retailers in our survey are the most likely to ALSO have bought furniture from Amazon and Target. Of the retailers tested for furniture purchases, Amazon and Wayfair have the largest share of its customer base who first bought furniture from them AFTER the start of the pandemic. Wayfair customers who bought for the first time after the start of the pandemic expect to buy furniture from Wayfair in the future at around the same rate as those who bought for the first time after the start of the pandemic. Amazon and Target have the largest gaps between pre/post pandemic customers (with customers acquired during the pandemic figuring to buy more often going forward than those who were acquired before the pandemic).

**PLATFORM SPECIFIC NOTES**

**Wayfair** | The share of Wayfair users who have purchased from Wayfair in the past three months dipped from a series high last quarter. Over the course of our survey series, however, KPIs related to awareness/usage and loyalty have improved. We continue to see cross shopping with Amazon, and consumers continue to hold the view that Amazon has better pricing.

**Etsy** | User engagement / self-reported purchasing is a touch softer than last quarter, but still above historical readings. Expected purchases of masks has dipped sequentially, but Etsy continues to retain a large share of customers who came to Etsy for the first time to buy a mask during the pandemic.

**Amazon** | Amazon remains in the lead in terms customer loyalty scores. For the most part feedback we collect was flat with data from prior volumes.

**ONLINE VS. IN-STORES**

We continue to see a dynamic where consumers think in-store shopping is rebounding and online is retreating a bit.

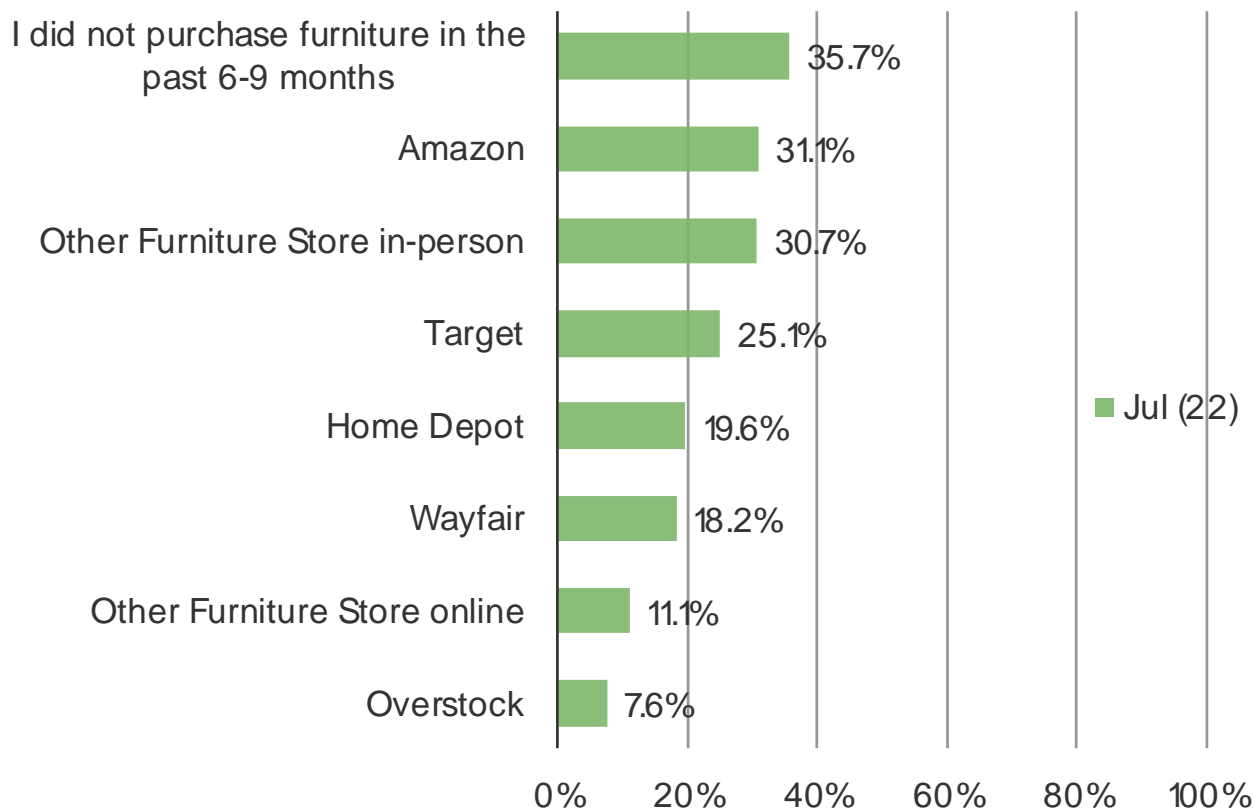
**MASKS**

Consumers self-report declines in mask purchases relative to prior volumes. Expectations for how often they will need to buy/wear masks going forward have regressed.

## HOME DEPOT AND TARGET <> FURNITURE

HAVE YOU EVER PURCHASED FURNITURE FROM ANY OF THE FOLLOWING?

Posed to all respondents (N = 1,032).



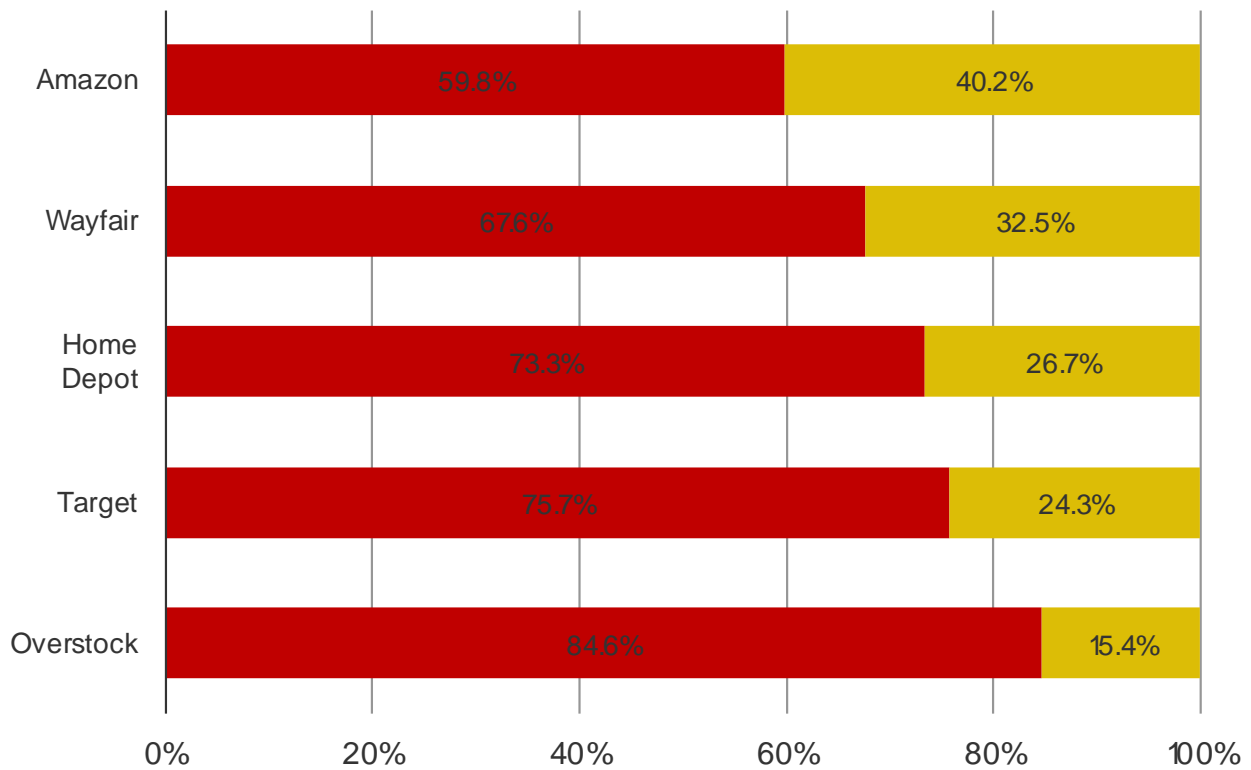
Cross-Tab Analysis of the Data From the Above Chart

Filter	Has also bought furniture from:							N =
	Wayfair	Target	Home Depot	Amazon	Overstock	Other Furniture Store in-person	Other Furniture Store online	
Has Bought Furniture From: Wayfair		43.6%	39.4%	58.5%	28.7%	46.8%	21.8%	188
Has Bought Furniture From: Target	31.7%		39.4%	61.4%	15.1%	41.7%	15.8%	259
Has Bought Furniture From: Home Depot	36.6%	50.5%		55.9%	17.8%	45.5%	19.8%	202
Has Bought Furniture From: Amazon	34.3%	49.5%	35.2%		15.6%	36.1%	16.5%	321
Has Bought Furniture From: Overstock	69.2%	50.0%	46.2%	64.1%		46.2%	23.1%	78
Has Bought Furniture From: Other Furniture Store in-person	27.8%	34.1%	29.0%	36.6%	11.4%		19.9%	317
Has Bought Furniture From: Other Furniture Store online	36.0%	36.0%	35.1%	46.5%	15.8%	55.3%		114

WHEN DID YOU BUY FURNITURE FROM THE FOLLOWING FOR THE FIRST TIME?

Posed to respondents who have purchased furniture from each of the following.

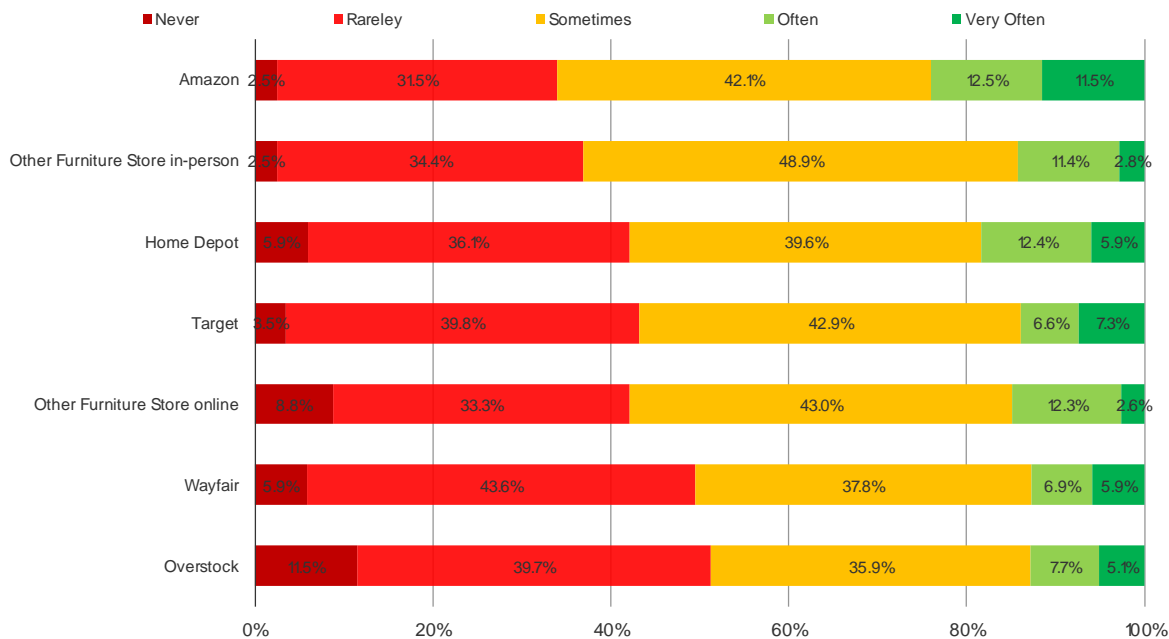
- BEFORE the start of the Covid pandemic (before March of 2020)
- AFTER the start of the Covid pandemic (after March of 2020)



	N =
Wayfair	188
Target	259
Home Depot	202
Amazon	321
Overstock	78

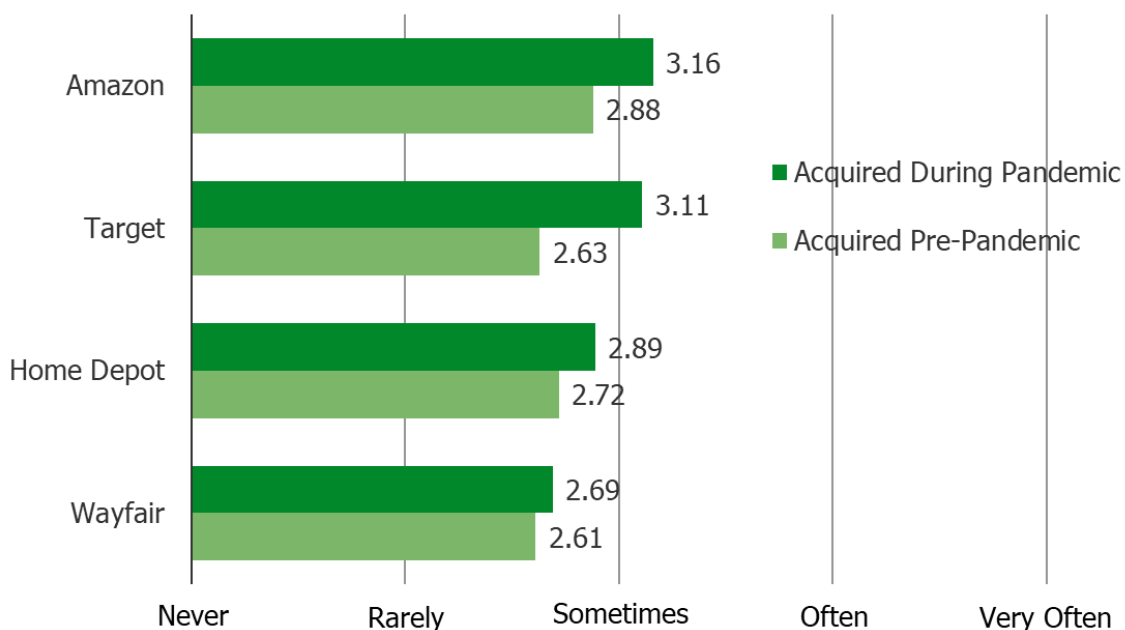
HOW OFTEN DO YOU EXPECT TO BUY FURNITURE FROM THE FOLLOWING GOING FORWARD?

Posed to respondents who have purchased furniture from each of the following.



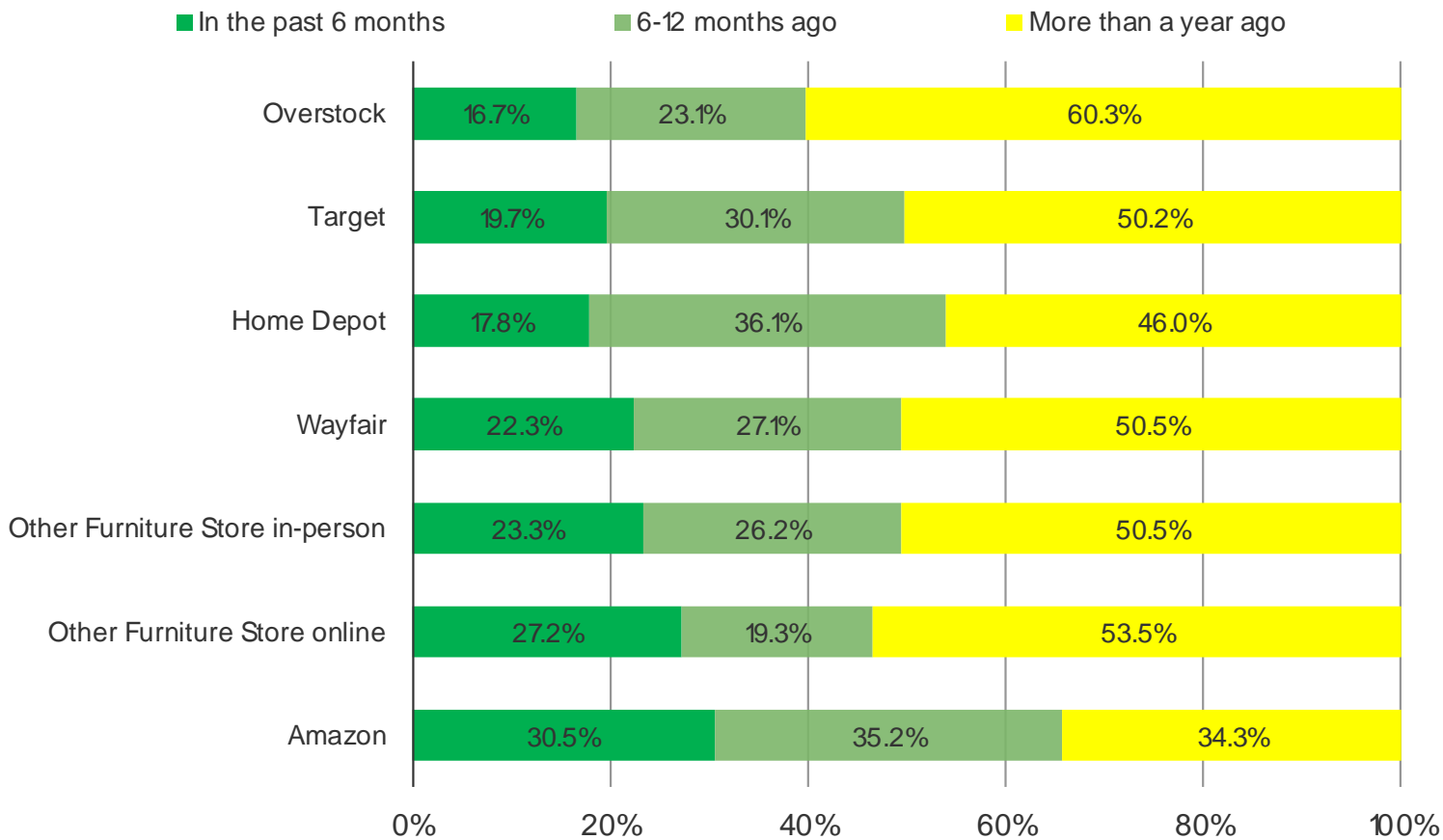
	N =
Wayfair	188
Target	259
Home Depot	202
Amazon	321
Overstock	78

Cross-Tab Analysis of the Data From the Above Chart



WHEN DID YOU MOST RECENTLY BUY FURNITURE FROM THE FOLLOWING?

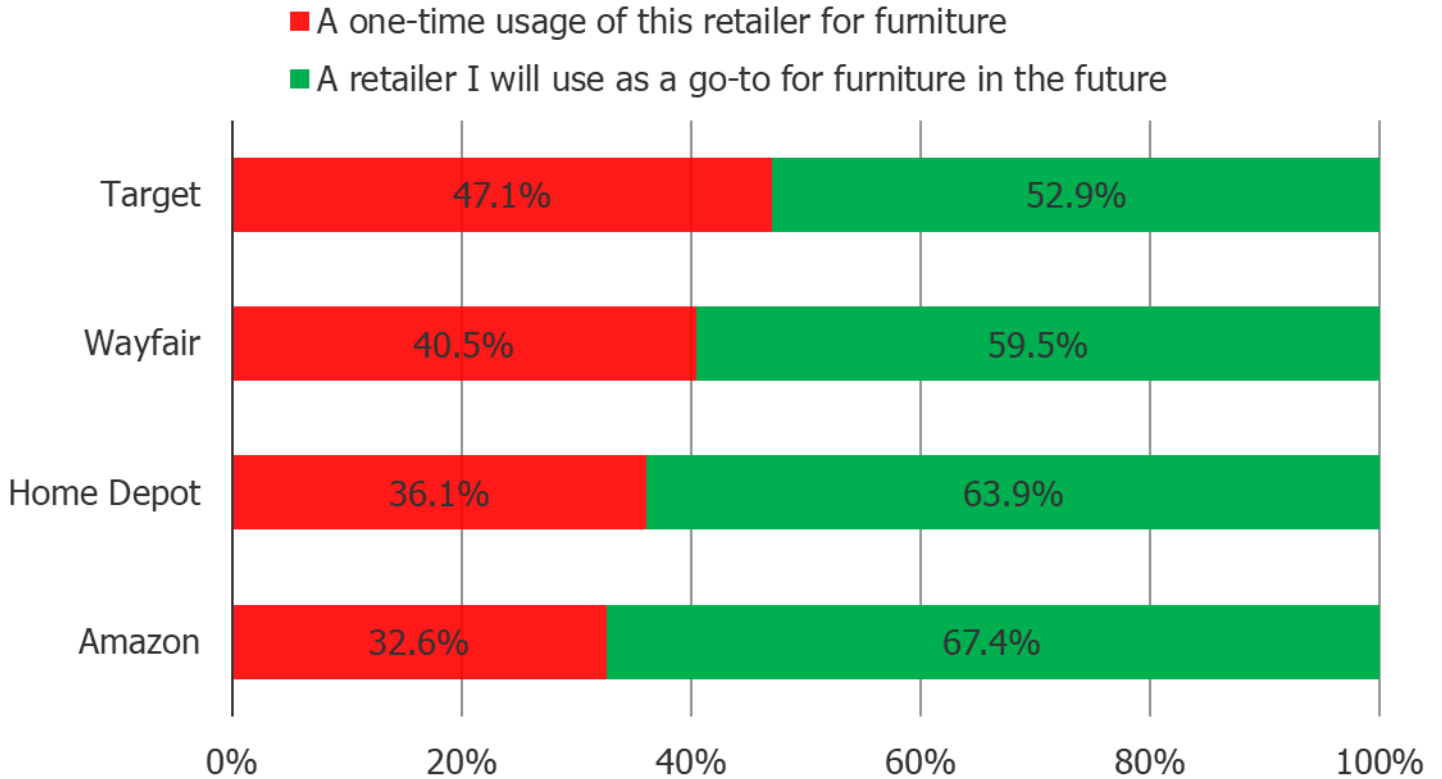
Posed to respondents who have purchased furniture from each of the following.



	N =
Wayfair	188
Target	259
Home Depot	202
Amazon	321
Overstock	78

THINKING ABOUT YOUR USAGE OF THE FOLLOWING FOR A FURNITURE PURCHASE IN THE PAST 6 MONTHS, DO YOU VIEW THIS AS...

Posed to respondents who have purchased furniture from each of the following in the past 6 months.



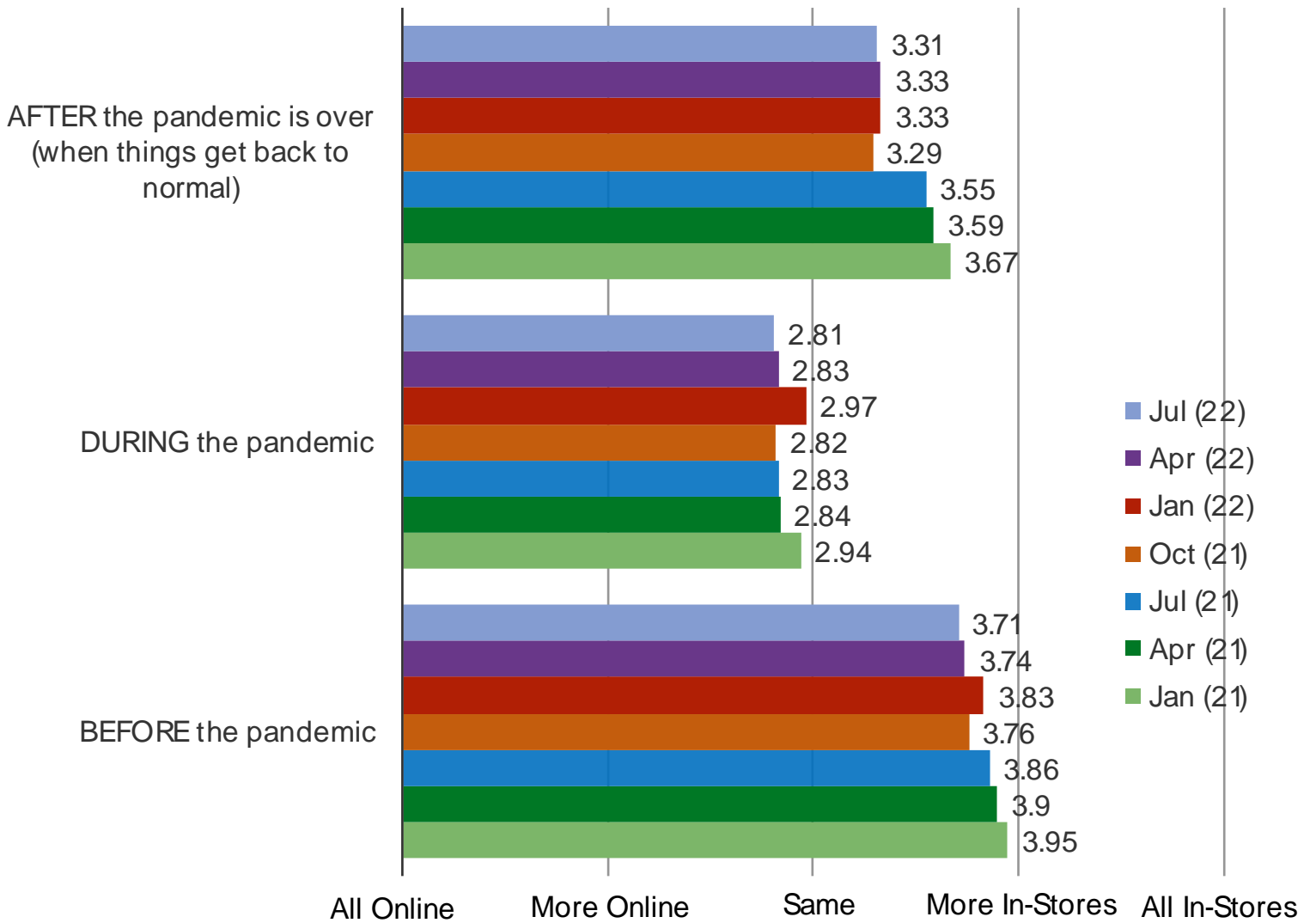
	N =
Amazon	98
Home Depot	36
Wayfair	42
Target	51



# FURNITURE PURCHASE TRENDS PRE / DURING / POST PANDEMIC

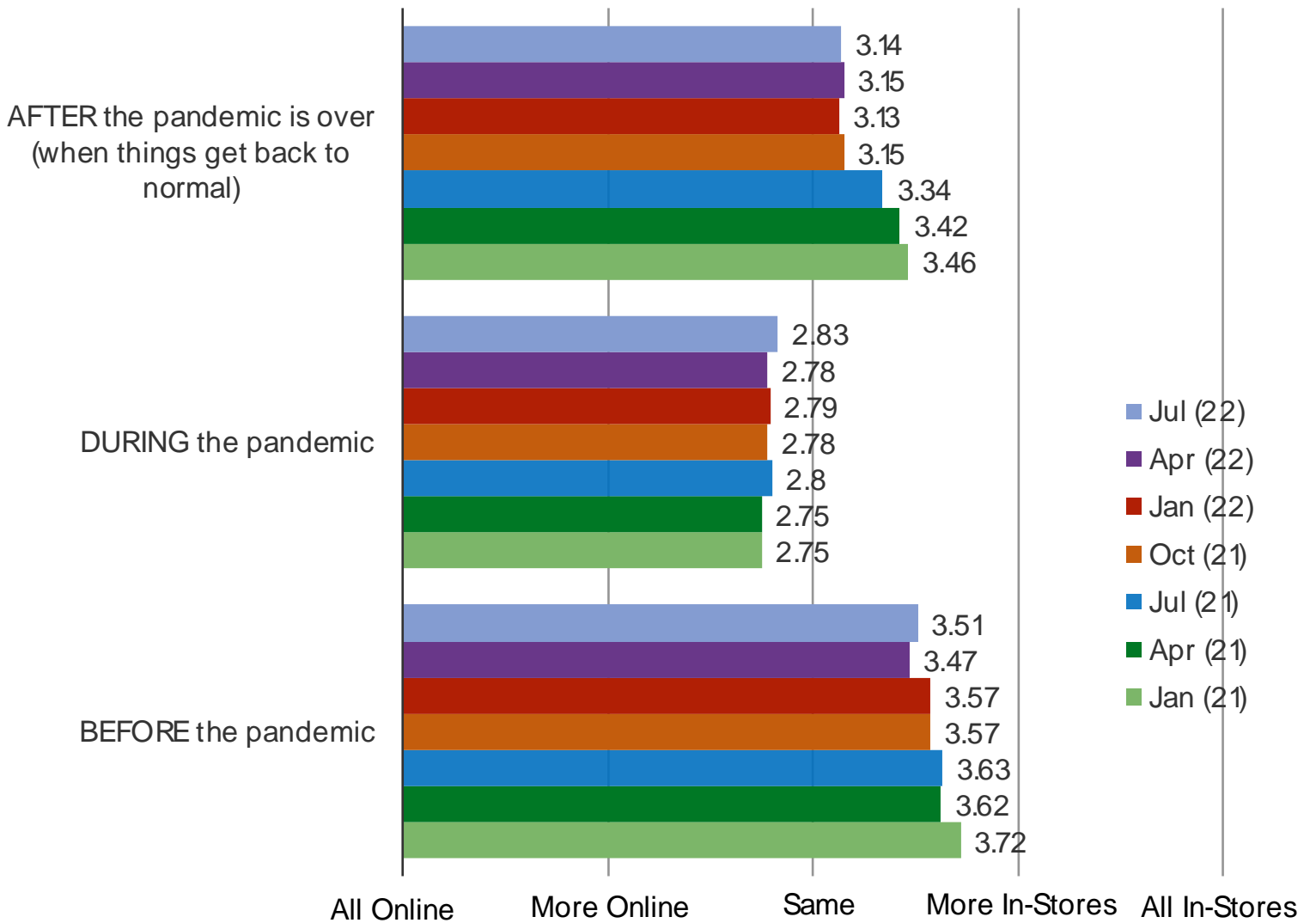
HOW MUCH OF YOUR FURNITURE PURCHASES DID YOU/WILL YOU BUY ONLINE VS IN-STORES...

Posed to all respondents.



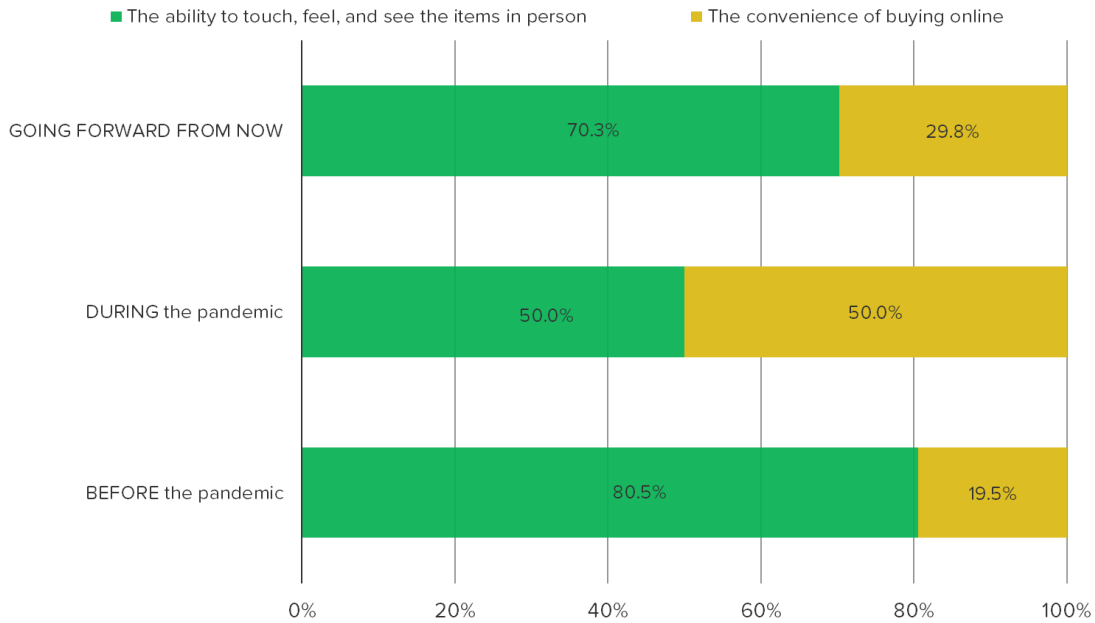
HOW MUCH OF YOUR HOME FURNISHINGS AND OTHER ITEMS FOR THE HOME PURCHASES DID YOU/WILL YOU BUY ONLINE VS IN-STORES...

Posed to all respondents.



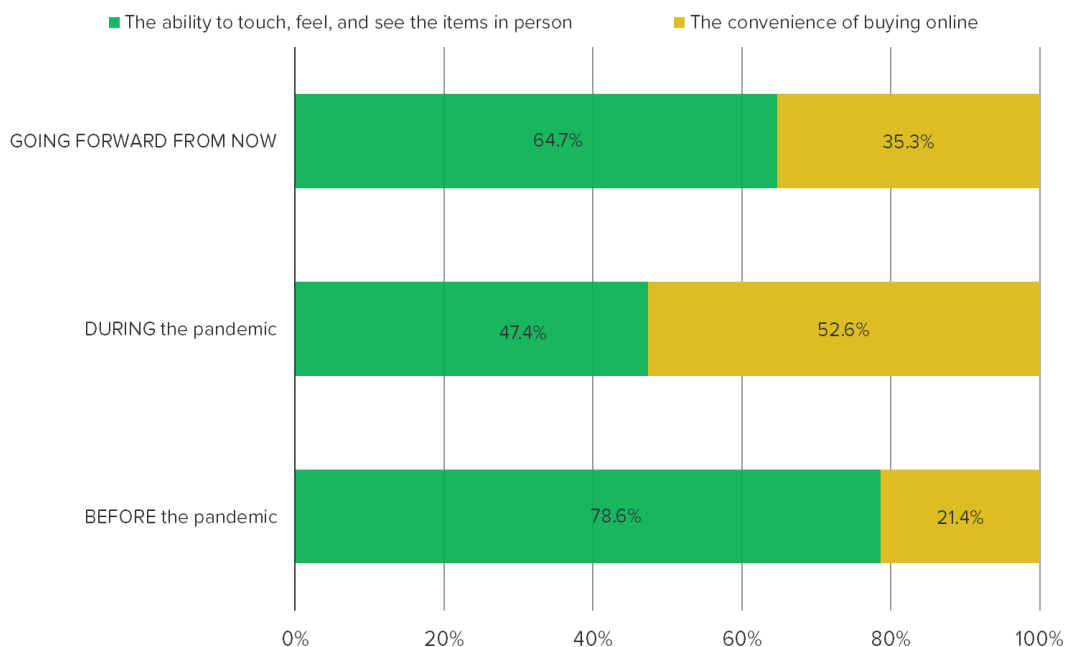
WHEN IT COMES TO BUYING FURNITURE, WHICH IS MORE IMPORTANT?

Posed to all respondents.



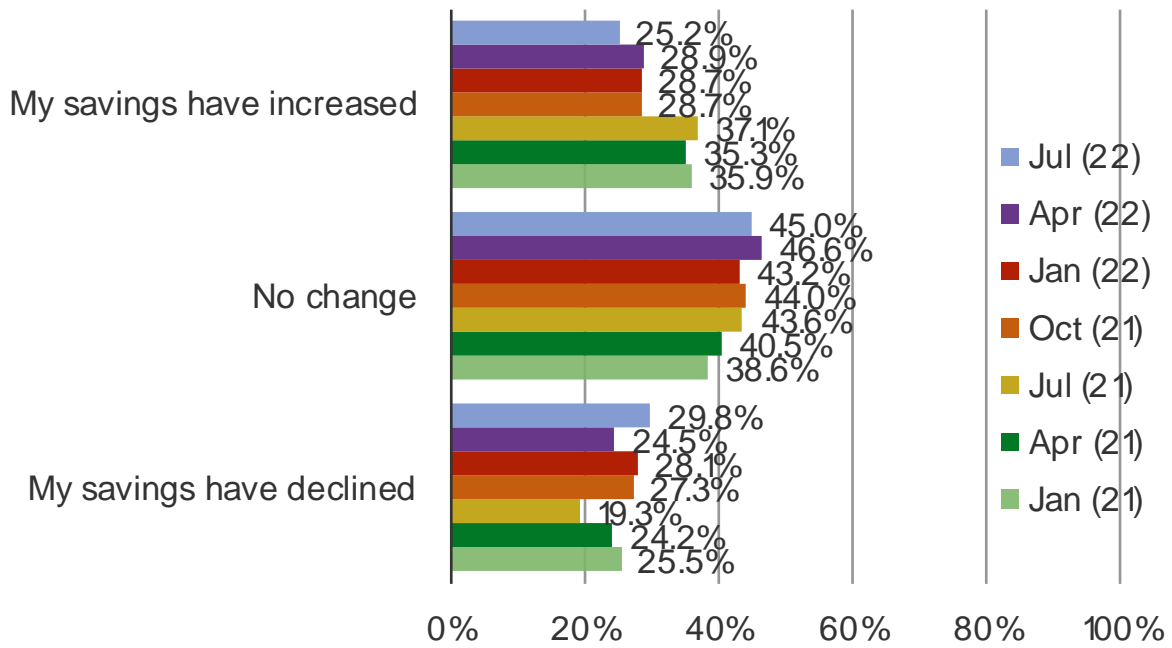
WHEN IT COMES TO BUYING HOME FURNISHINGS AND OTHER ITEMS FOR THE HOME, WHICH IS MORE IMPORTANT?

Posed to all respondents.



TO THE BEST OF YOUR ESTIMATION, DID THE AMOUNT OF MONEY YOU HAVE SAVED CHANGE SINCE THE START OF THE COVID-19 PANDEMIC?

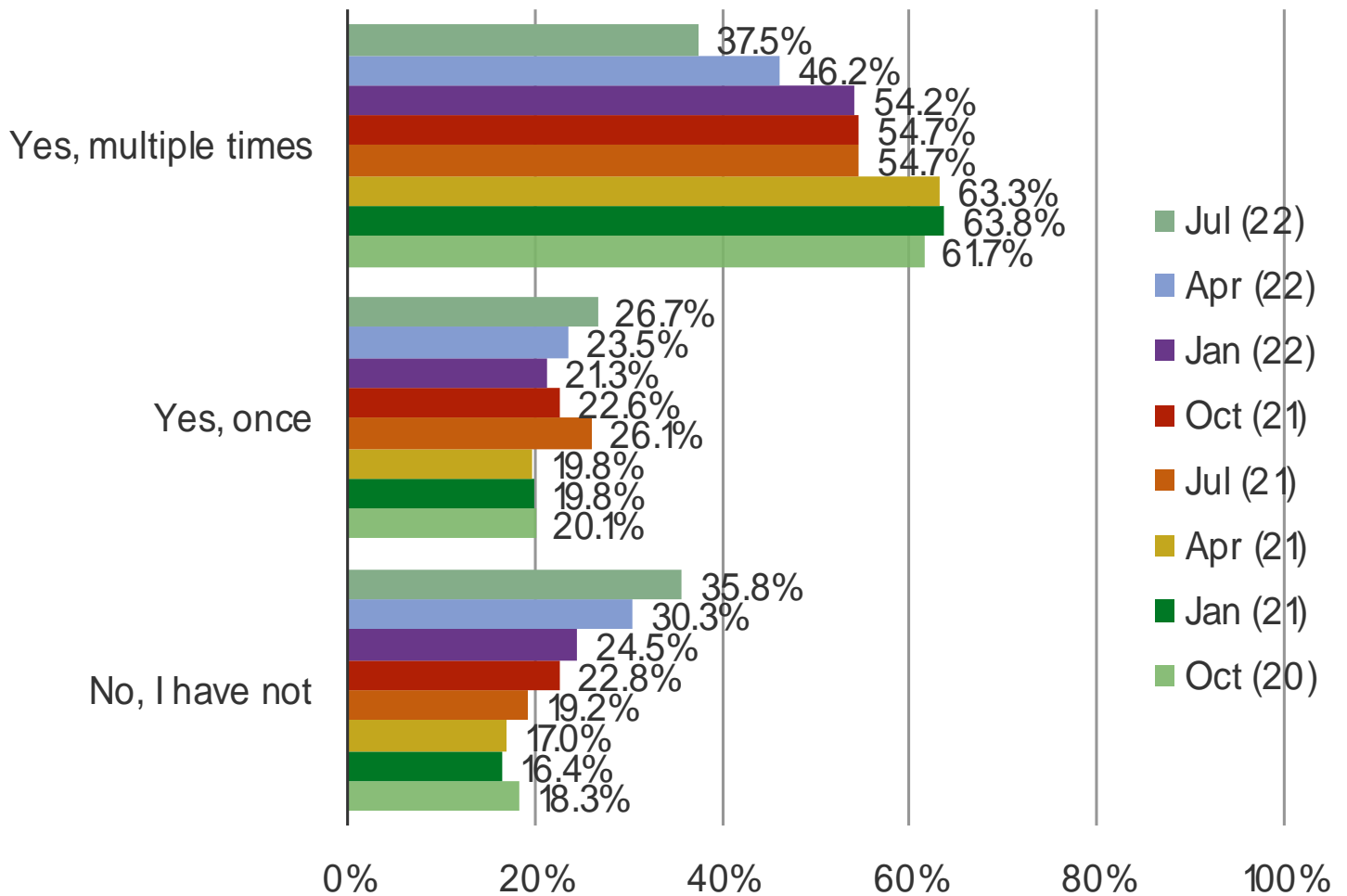
Posed to all respondents.



# FACE MASKS

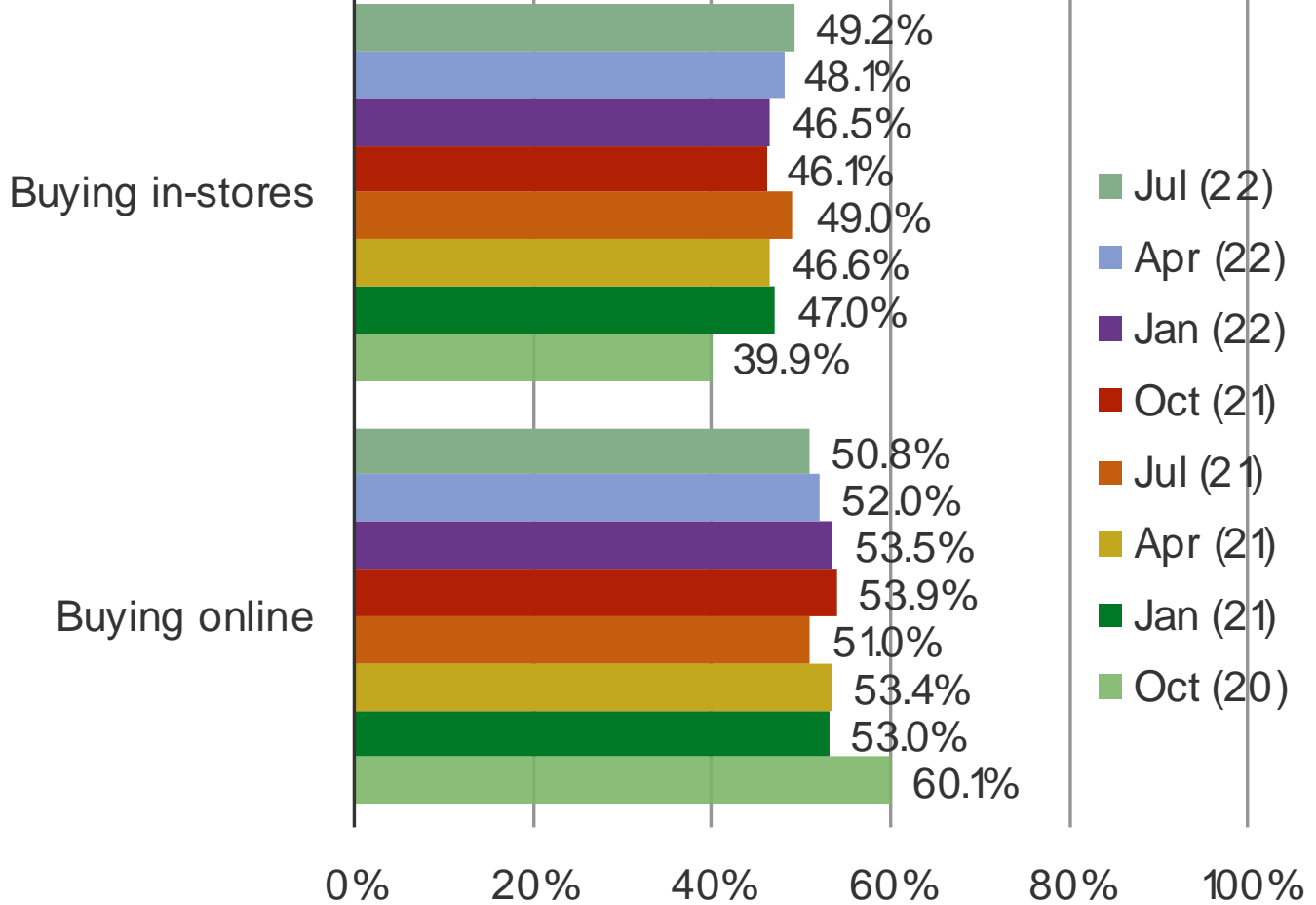
HAVE YOU PURCHASED MASK(S) THIS YEAR?

Posed to all respondents



WHICH WOULD YOU PREFER FOR PURCHASING MASKS?

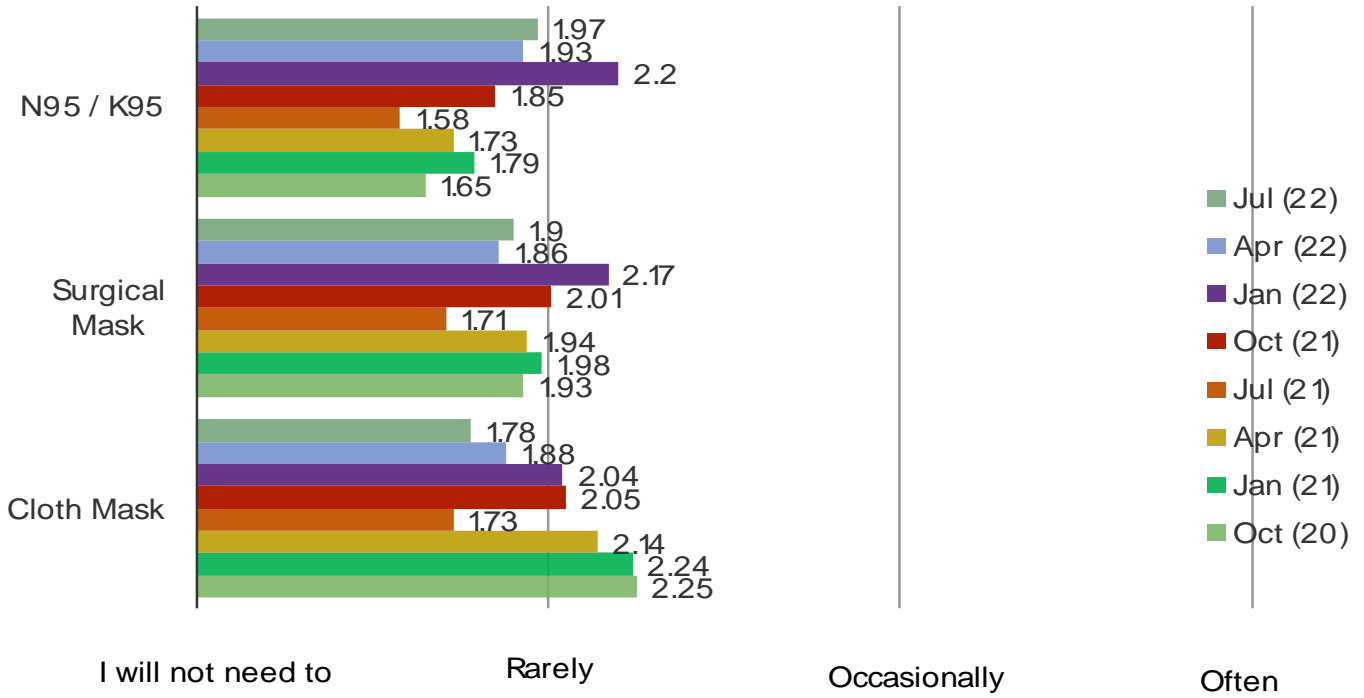
Posed to all respondents



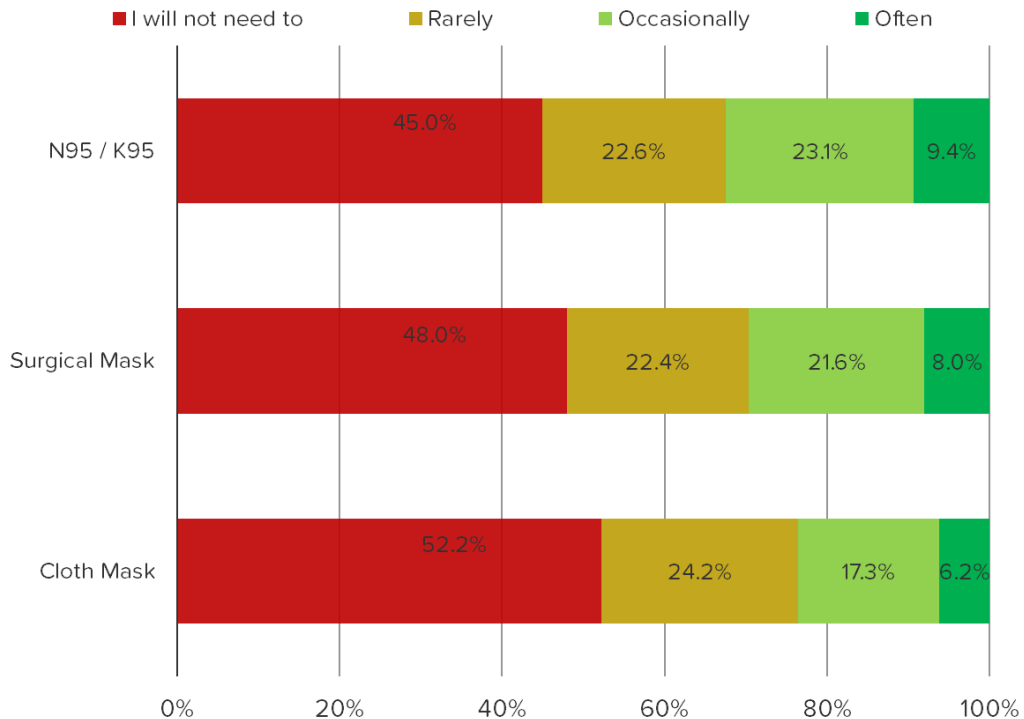


GOING FORWARD, HOW OFTEN DO YOU EXPECT TO NEED TO PURCHASE NEW MASKS OR FACE COVERINGS?

Posed to all respondents

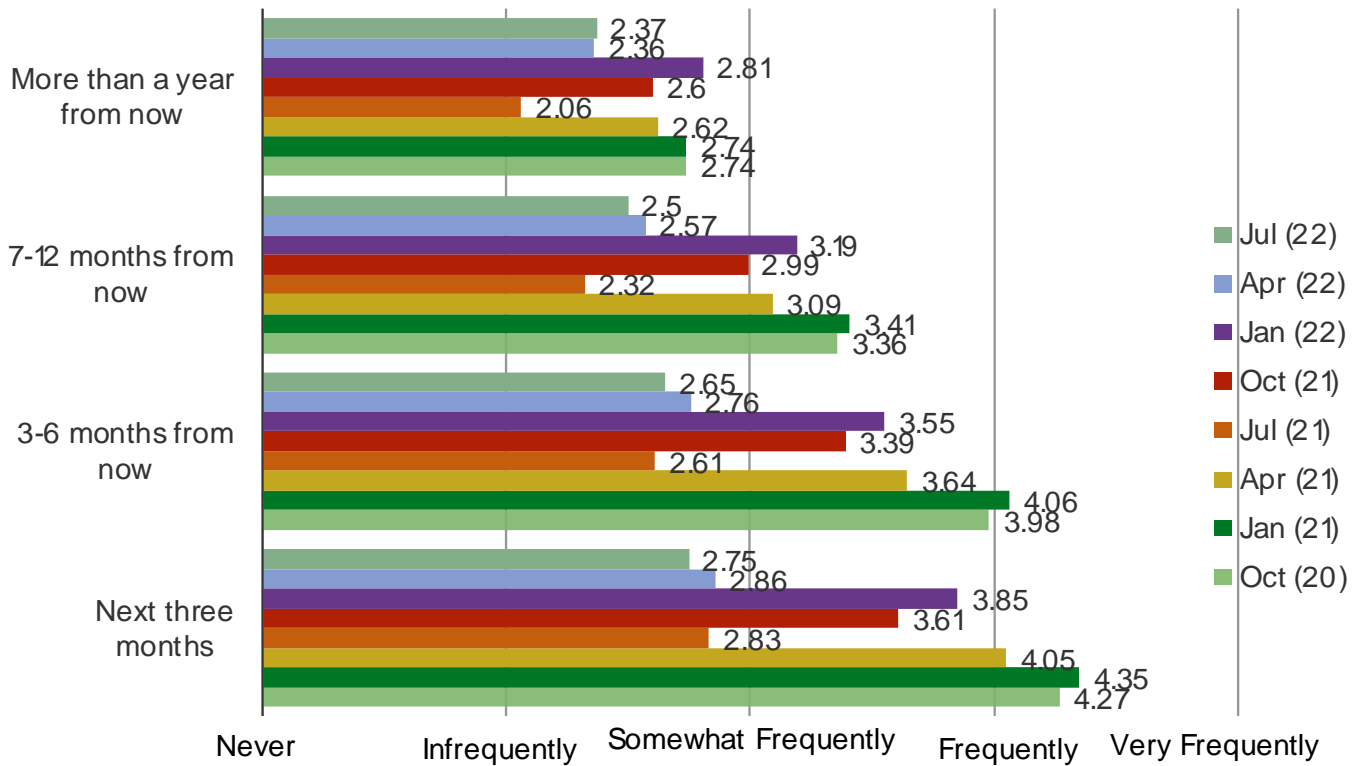


July 2022 data broken out:



HOW OFTEN DO YOU EXPECT TO WEAR A MASK DURING THE FOLLOWING PERIODS?

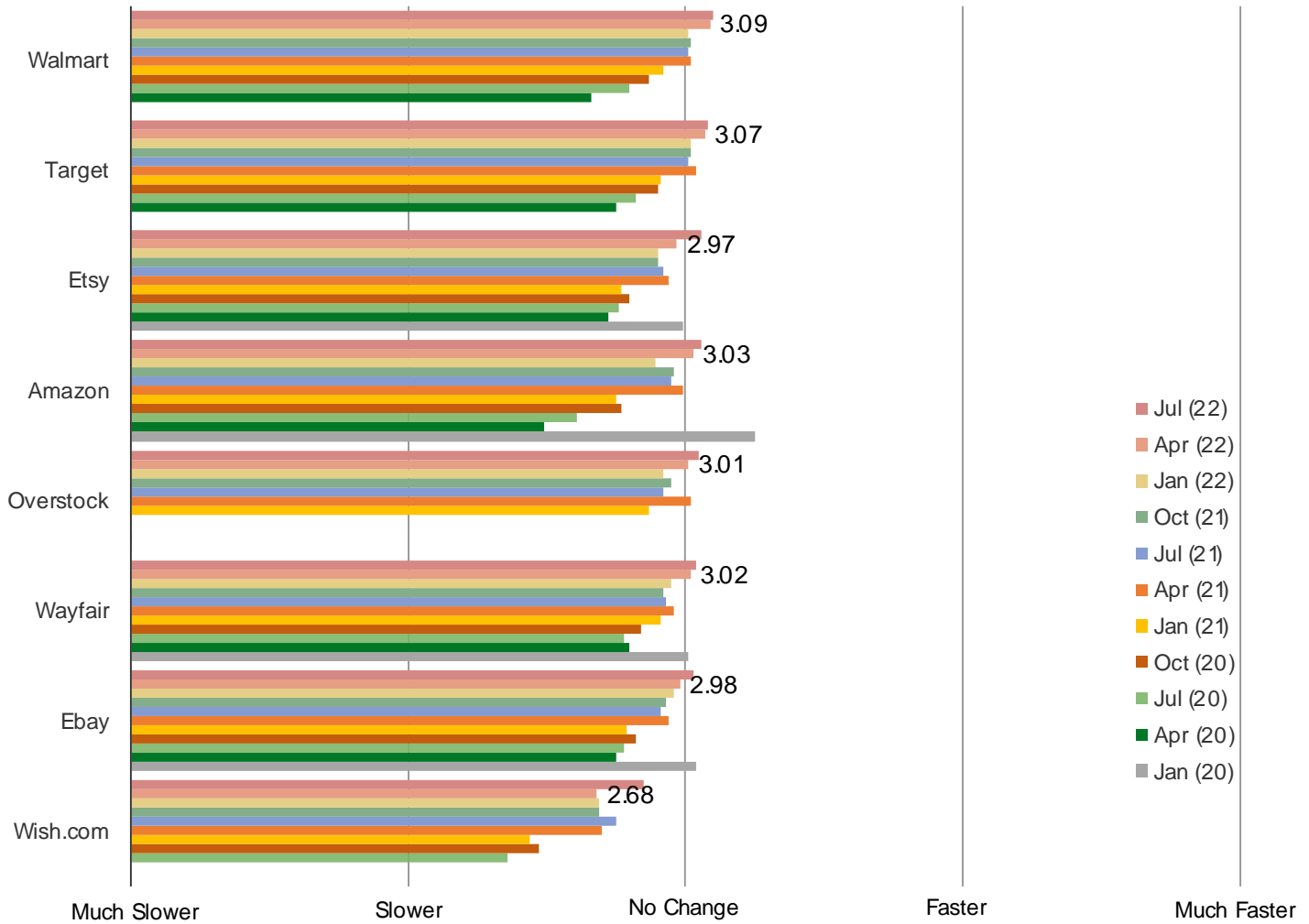
Posed to all respondents



## SHIPPING DELAYS

HAVE YOU NOTICED ANY CHANGES IN AVAILABLE SHIPPING TIMES WHEN USING THIS PLATFORM RECENTLY?

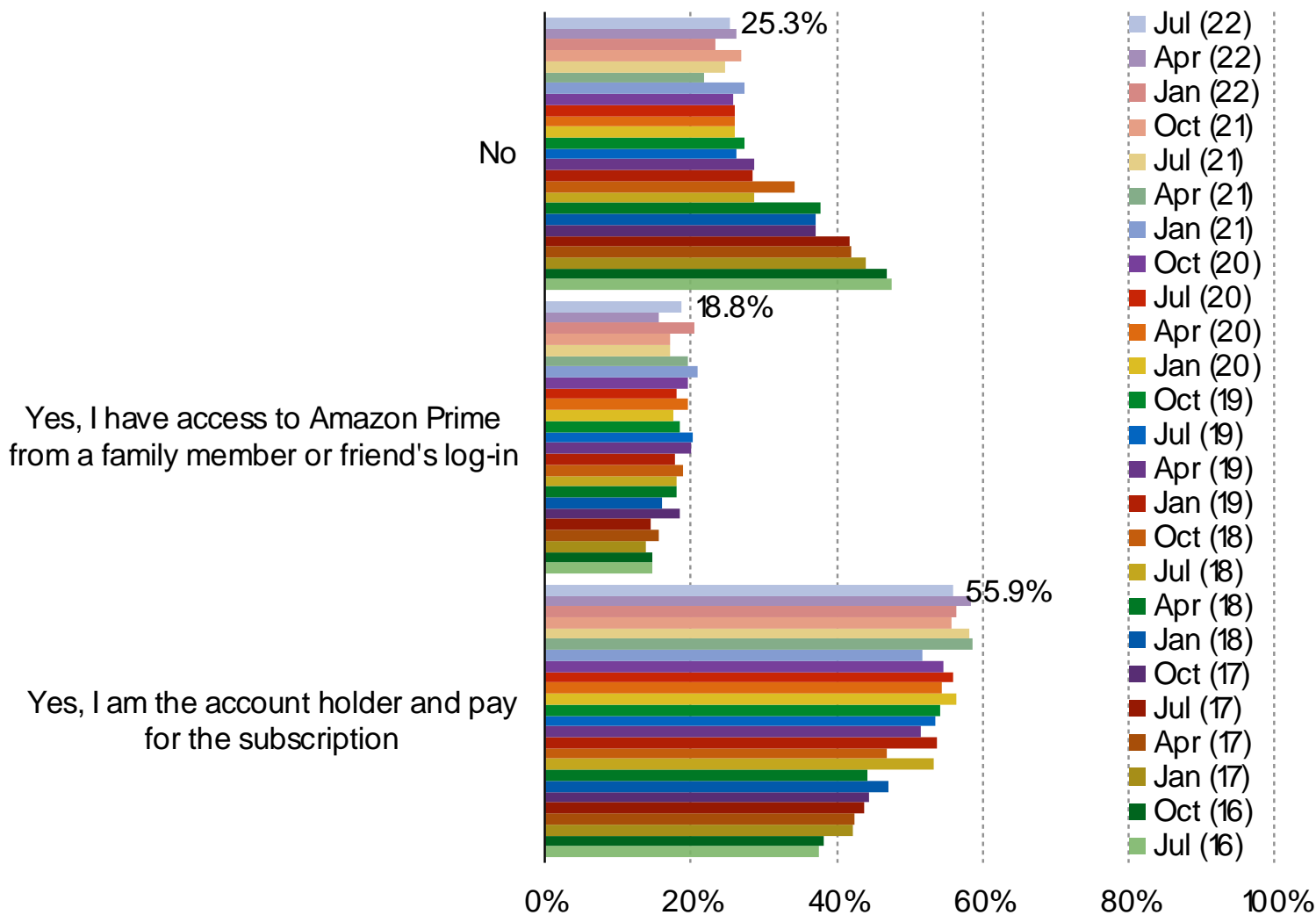
Posed to users of each site/app.



## AMZN PRIME TRENDS

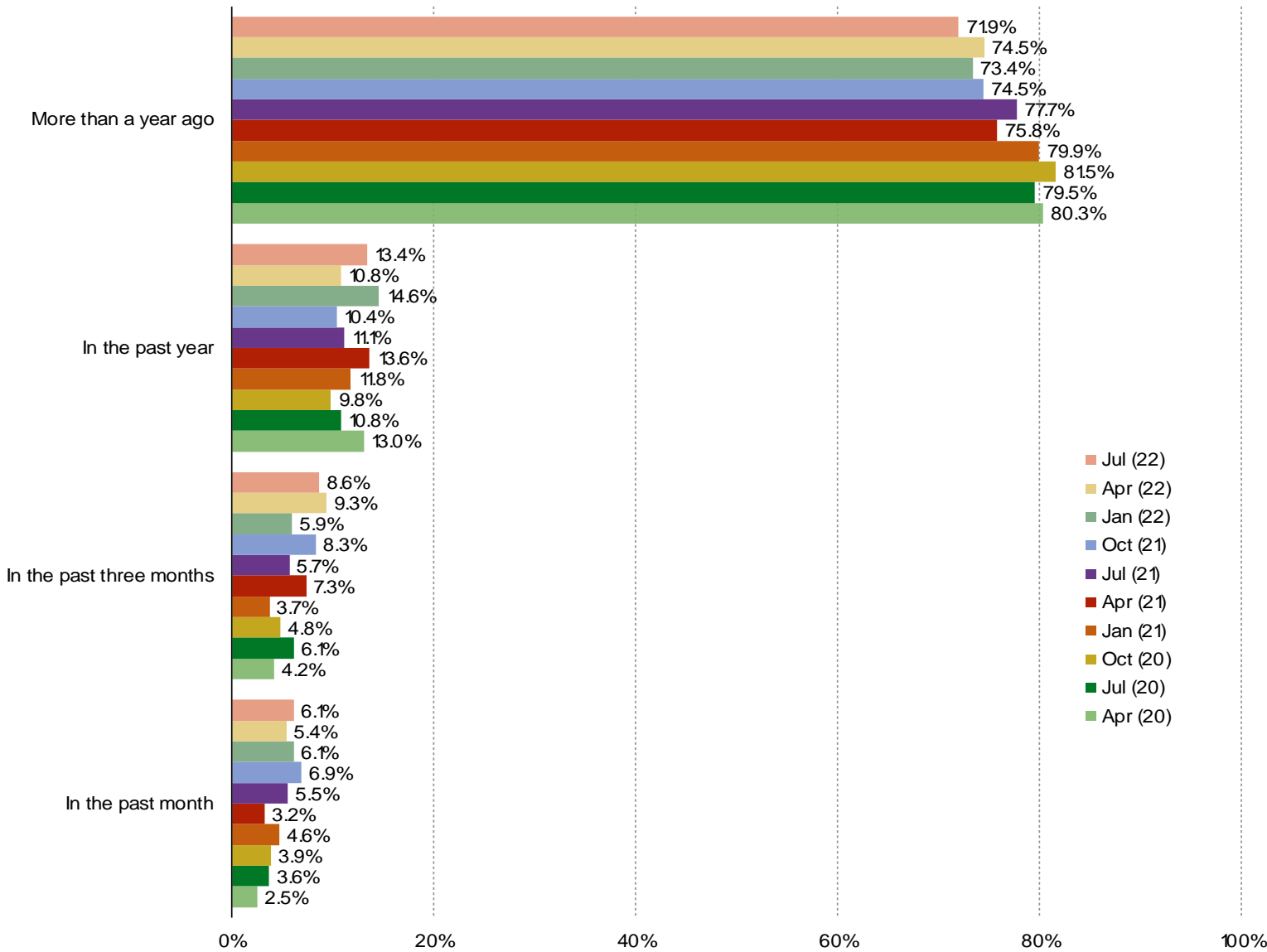
ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

Posed to Amazon users



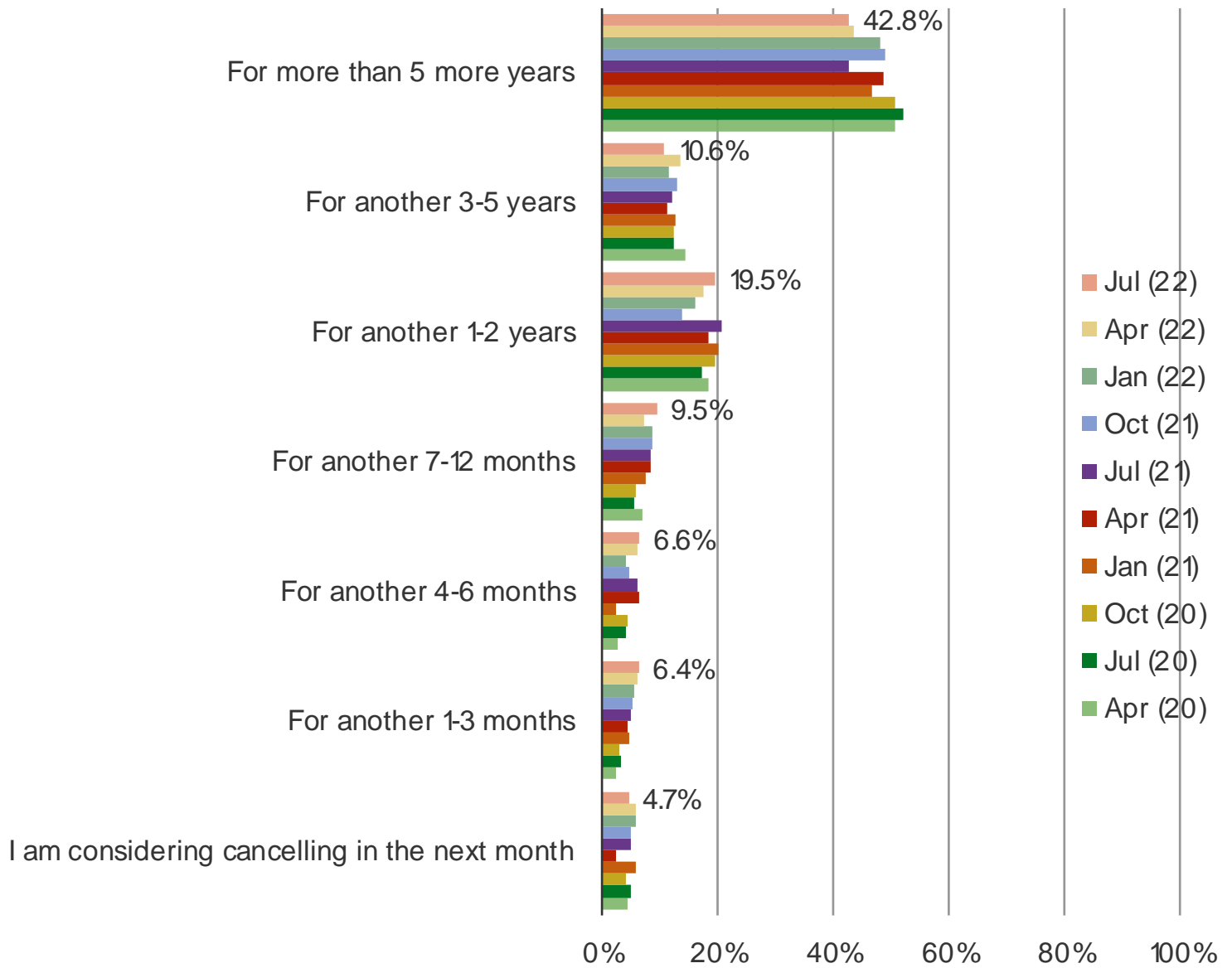
WHEN DID YOU START YOUR CURRENT AMAZON PRIME MEMBERSHIP?

Posed to Amazon users who are Prime members.



FOR HOW MUCH LONGER DO YOU INTEND TO BE AN AMAZON PRIME MEMBER?

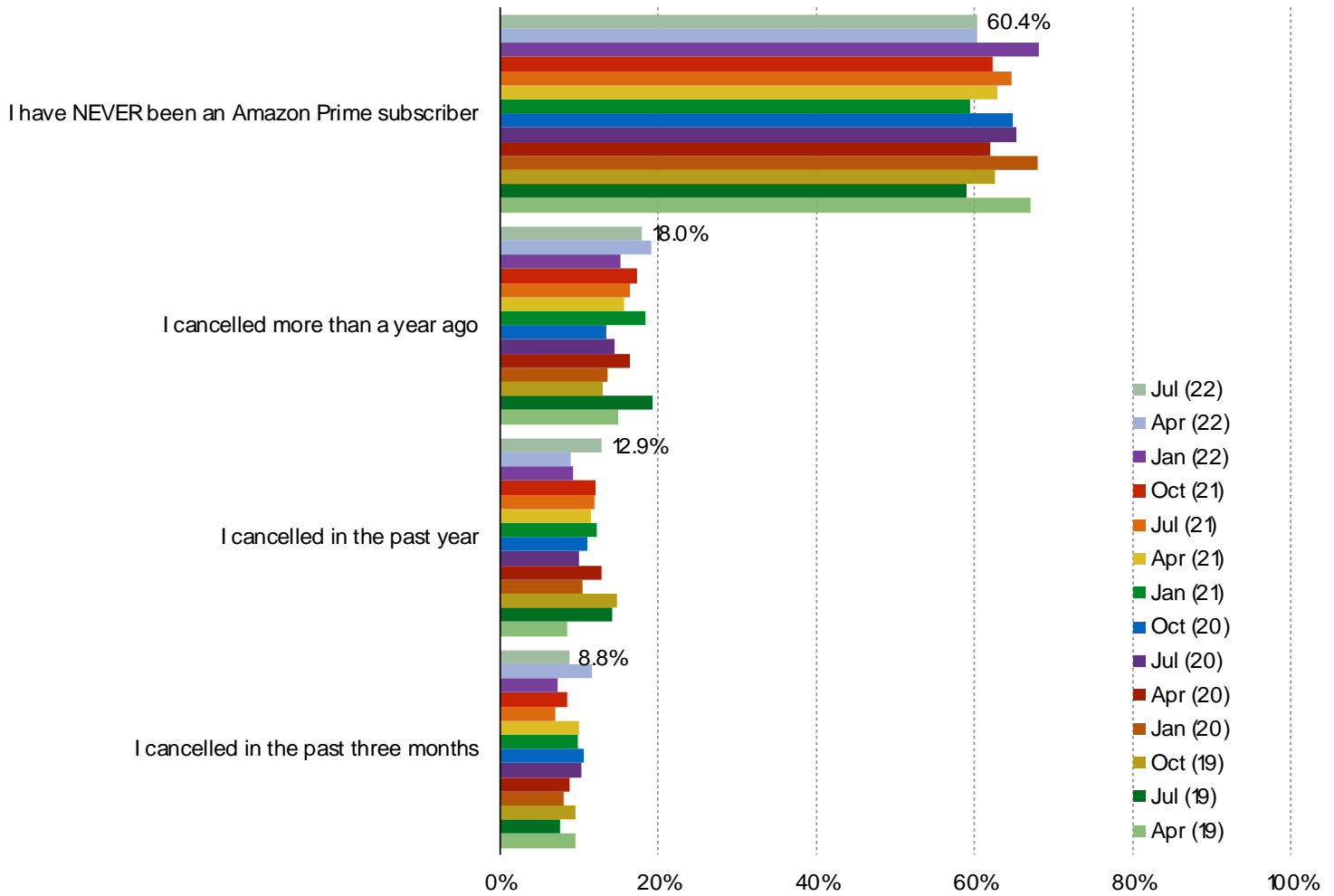
Posed to Amazon users who are Prime members.





HAVE YOU EVER BEEN AN AMAZON PRIME SUBSCRIBER IN THE PAST?

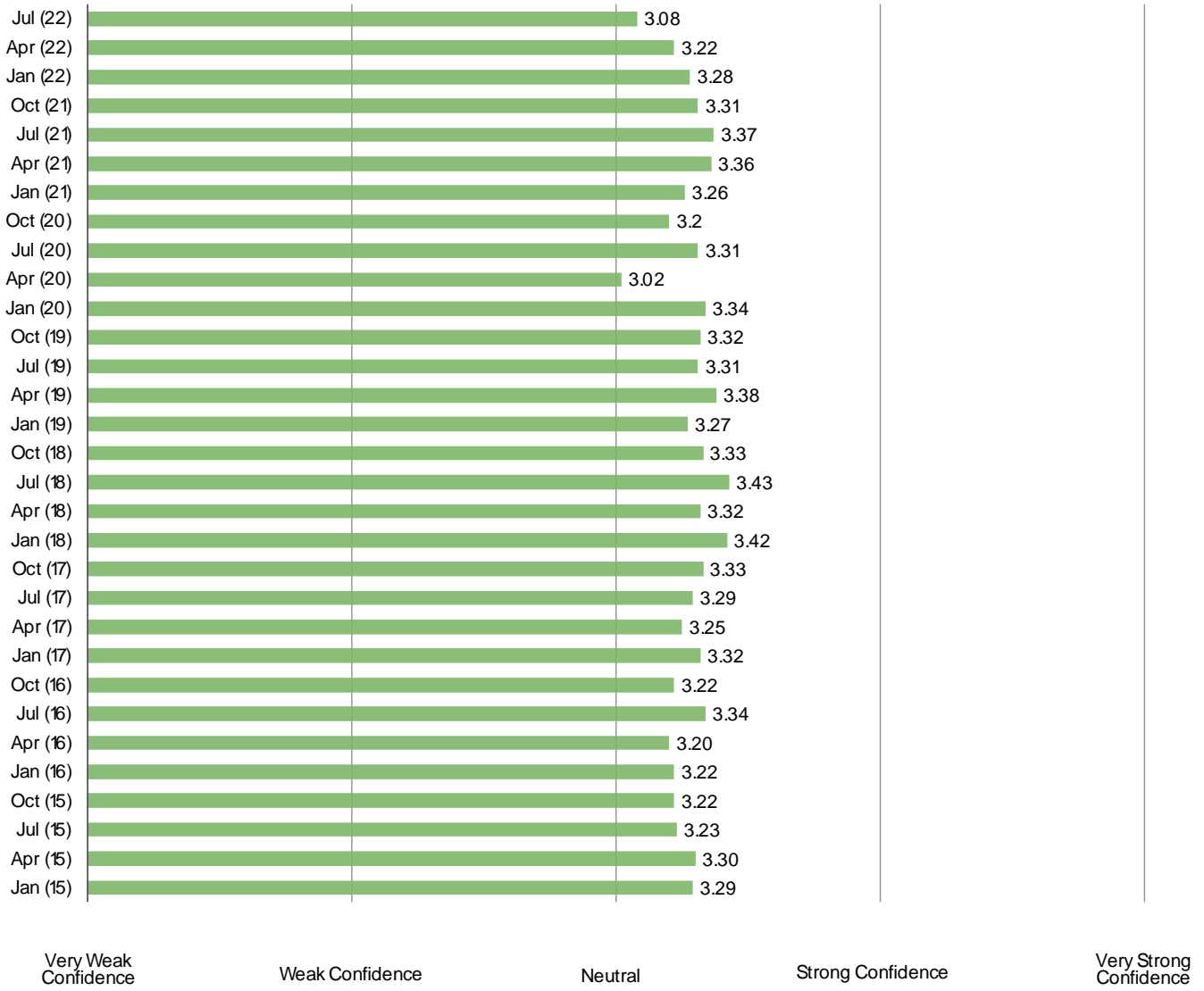
Posed to Amazon users **who are not prime subscribers**



## OVERALL SHOPPING TRENDS

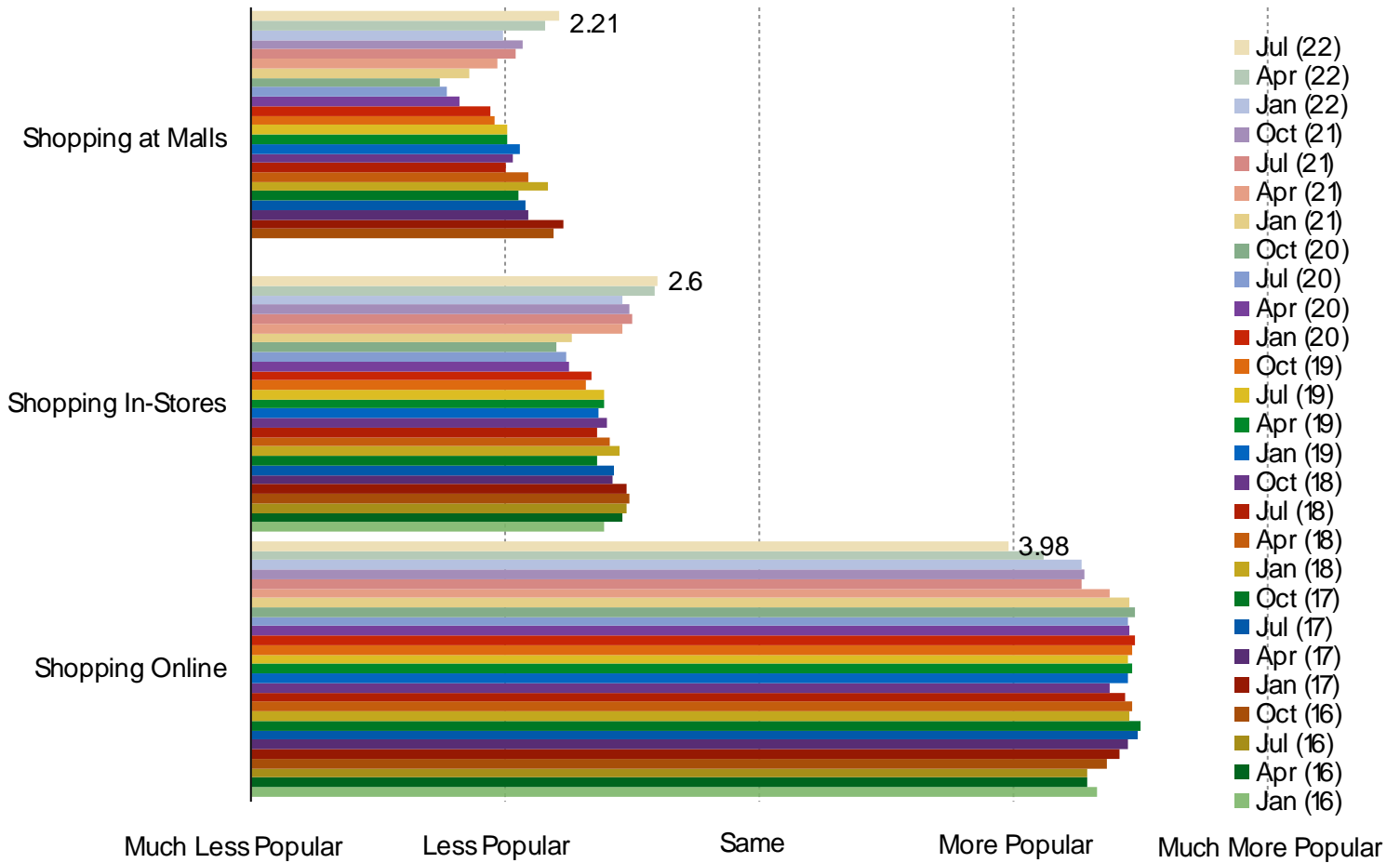
HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



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

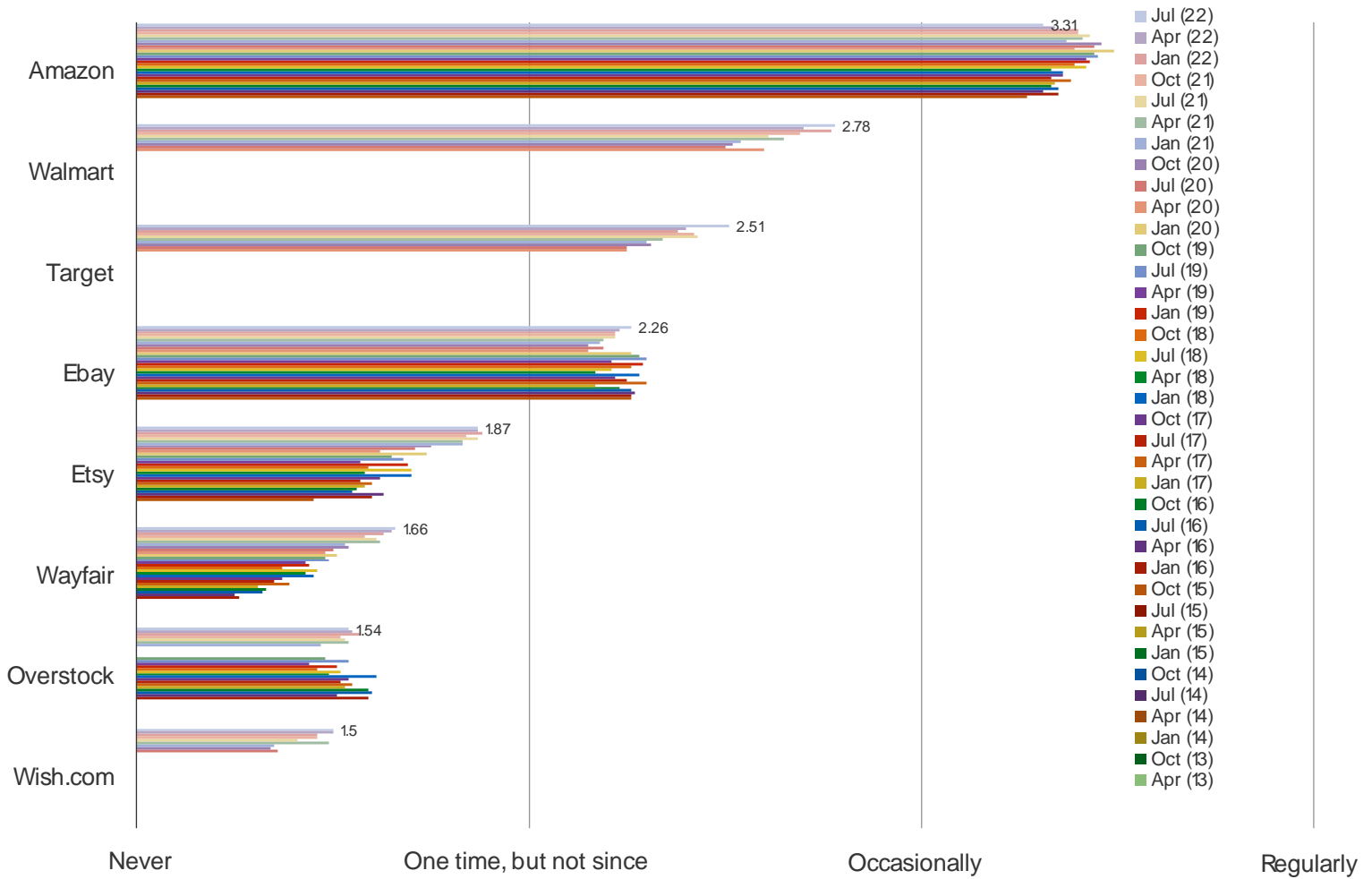
Posed to all respondents



## COMPETITIVE DYNAMICS

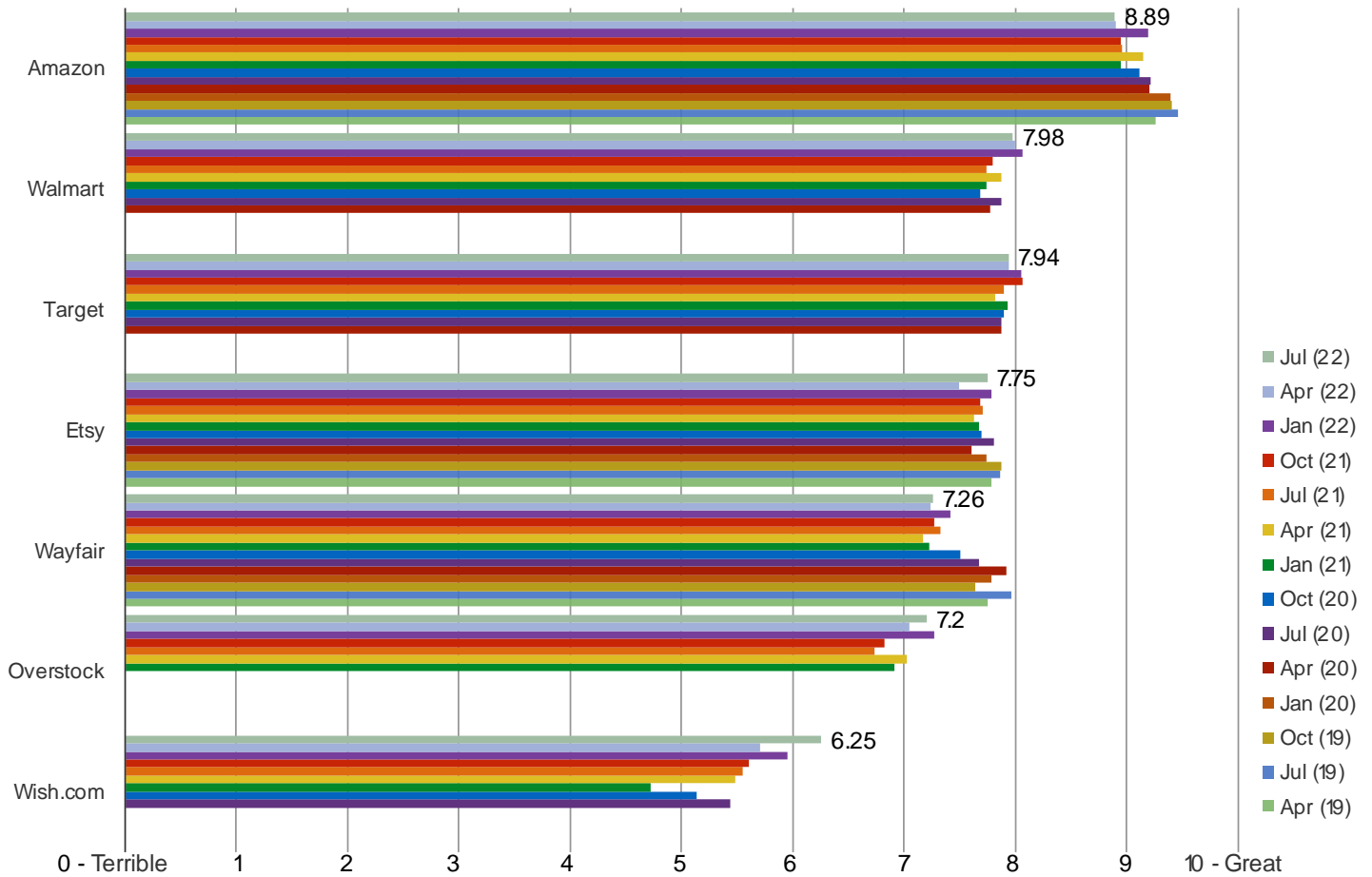
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



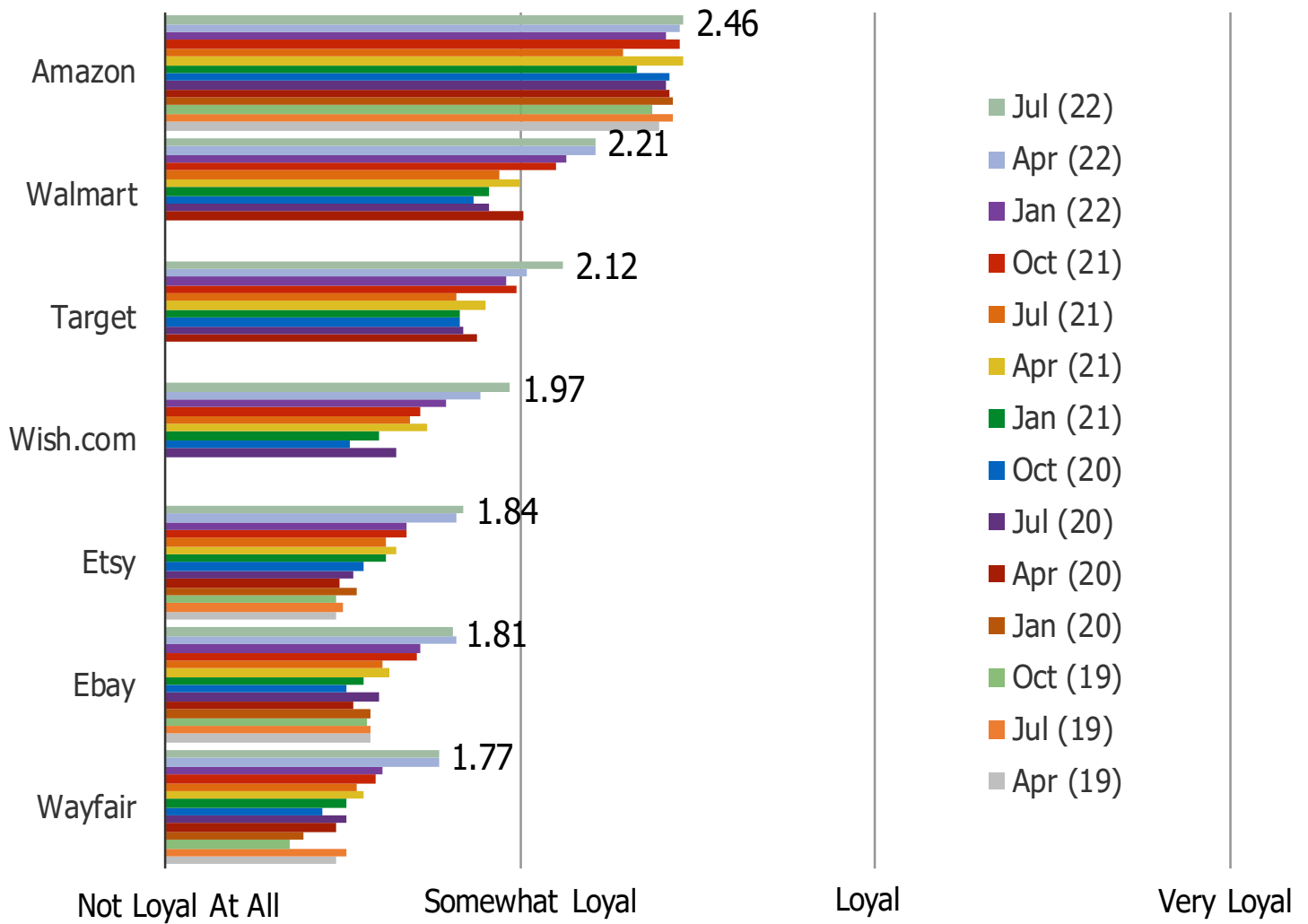
HOW DO YOU FIND THE SHIPPING EXPERIENCE WITH THIS APP/SITE?

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

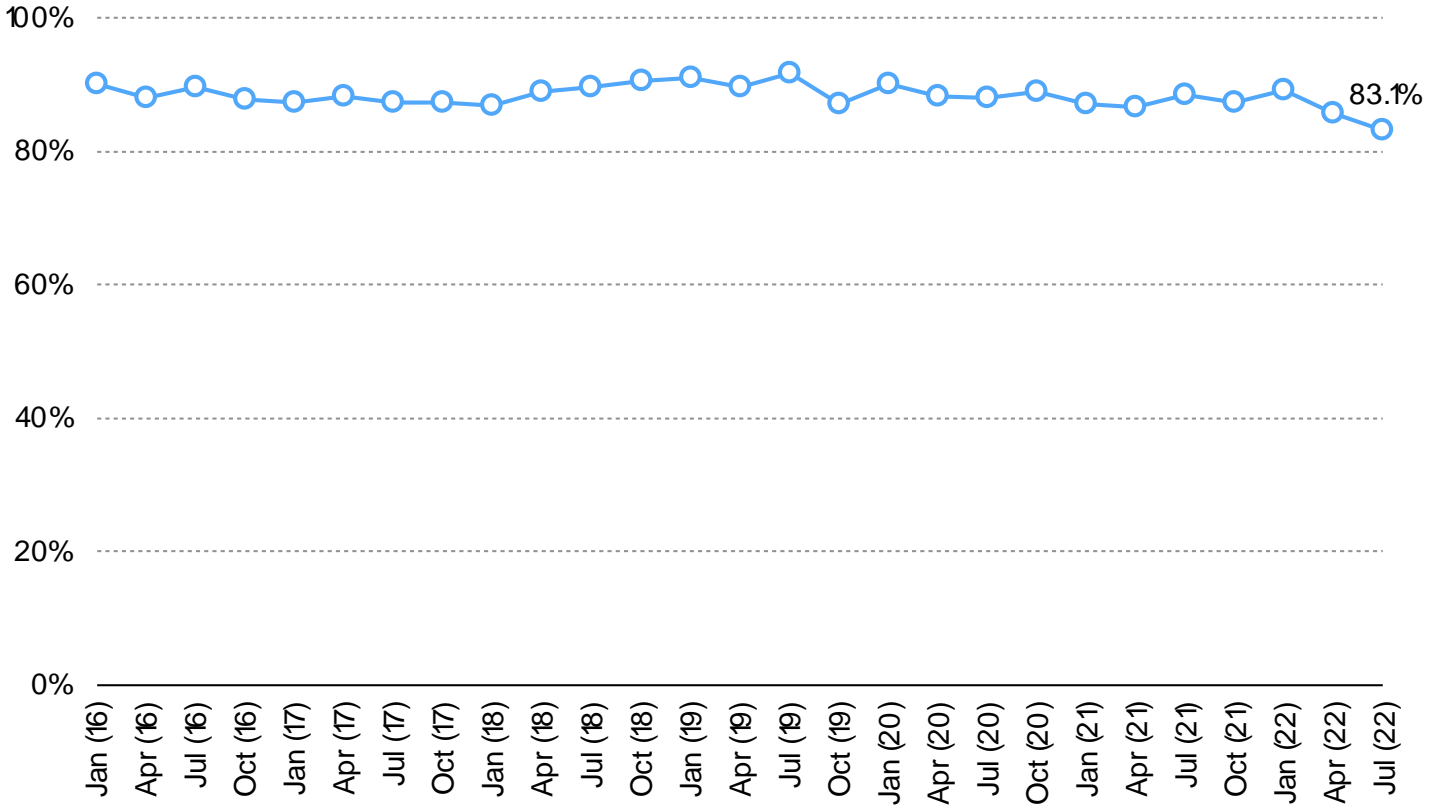




## AMZN TRENDS

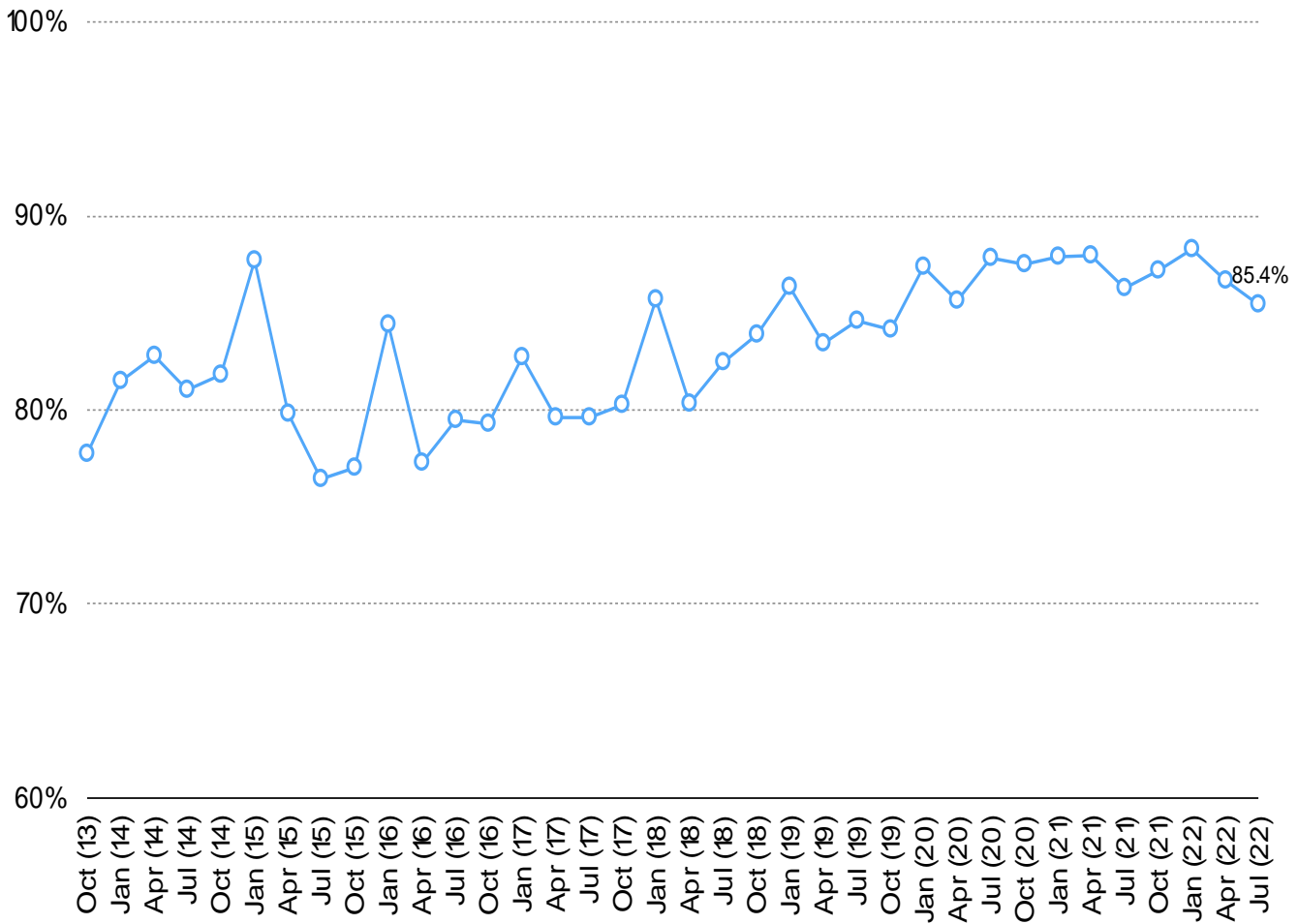
DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.



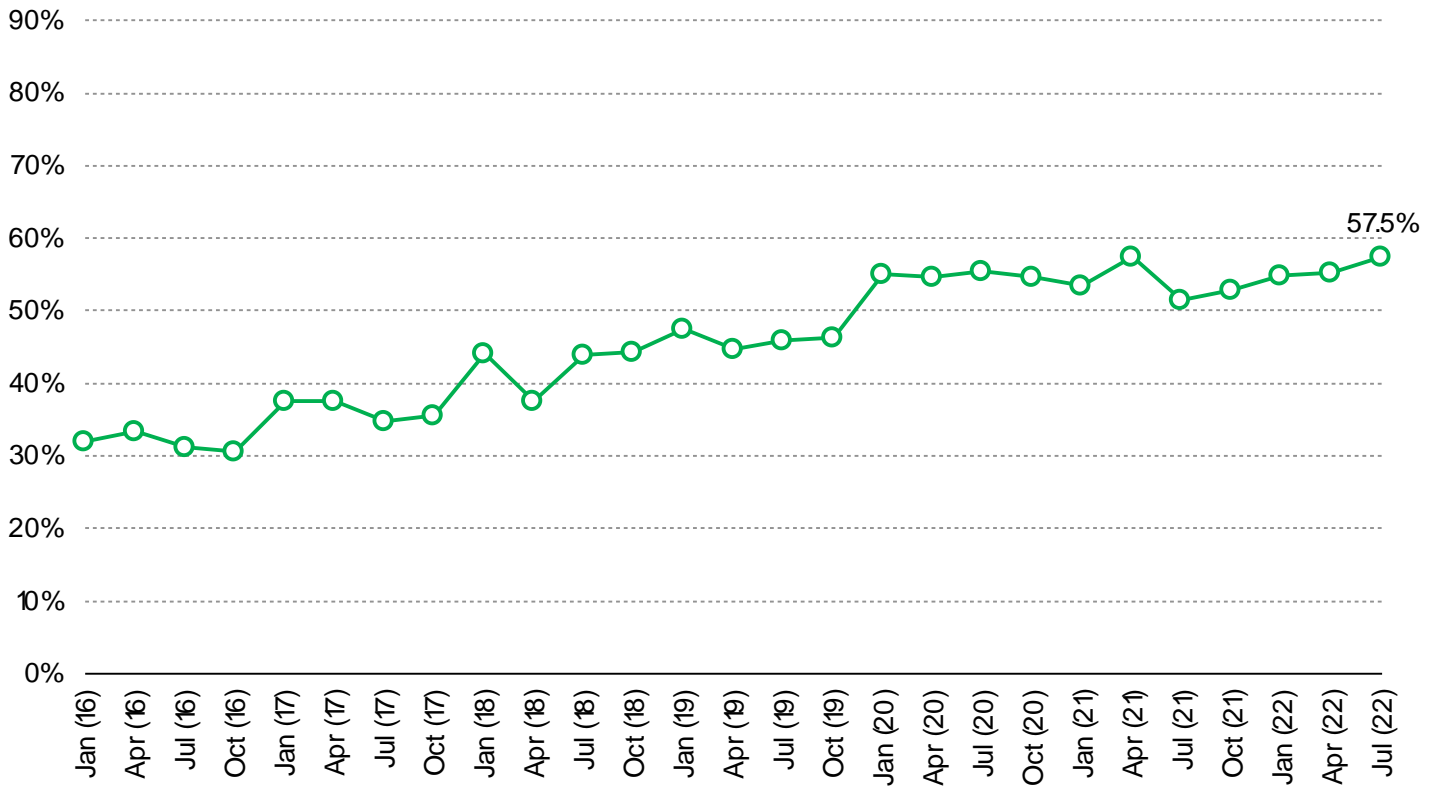
AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

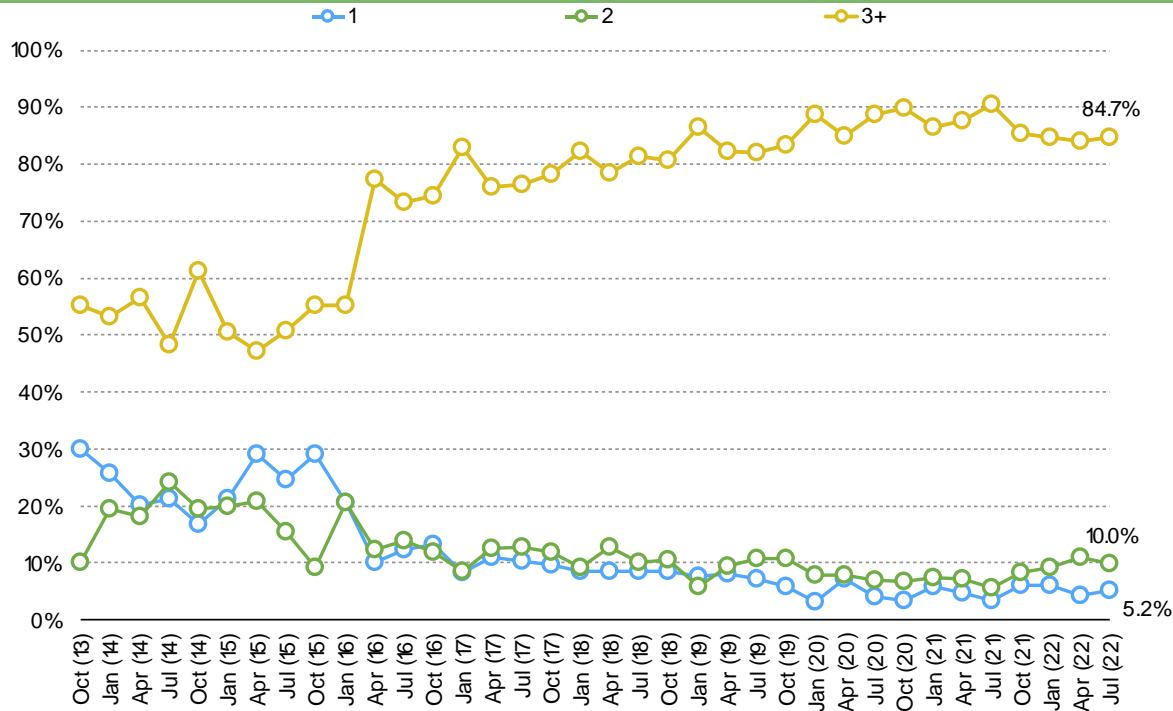


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

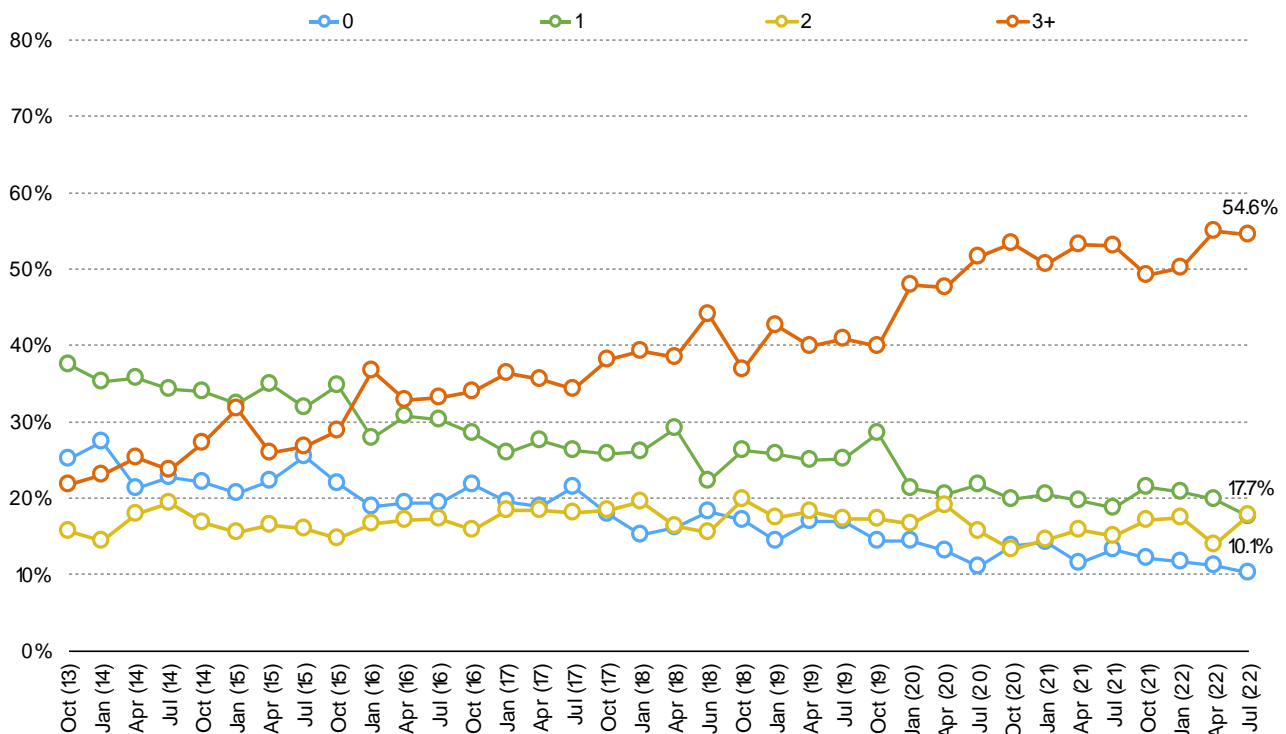
Posed to Amazon users



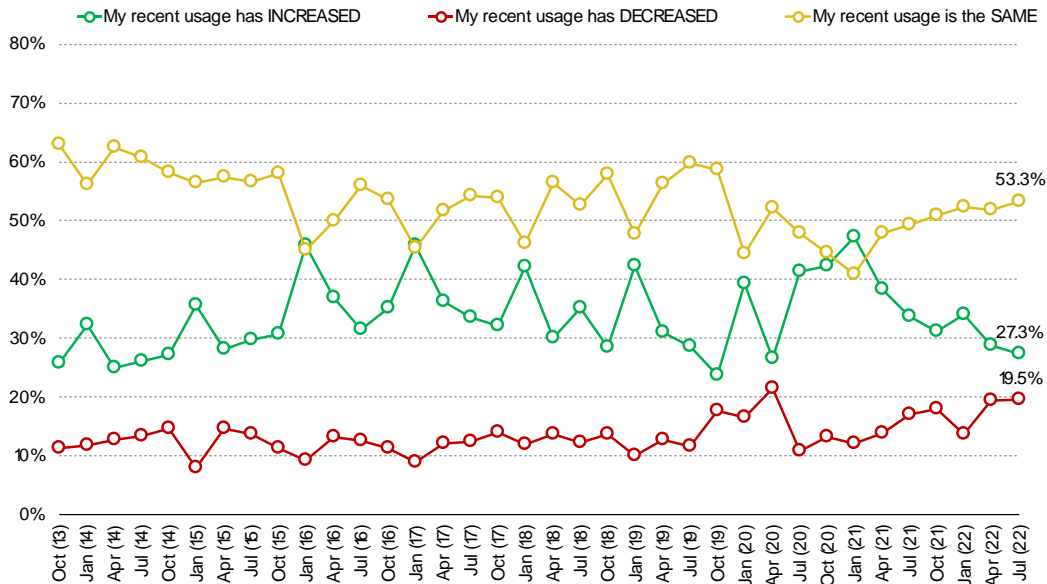
**PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?**



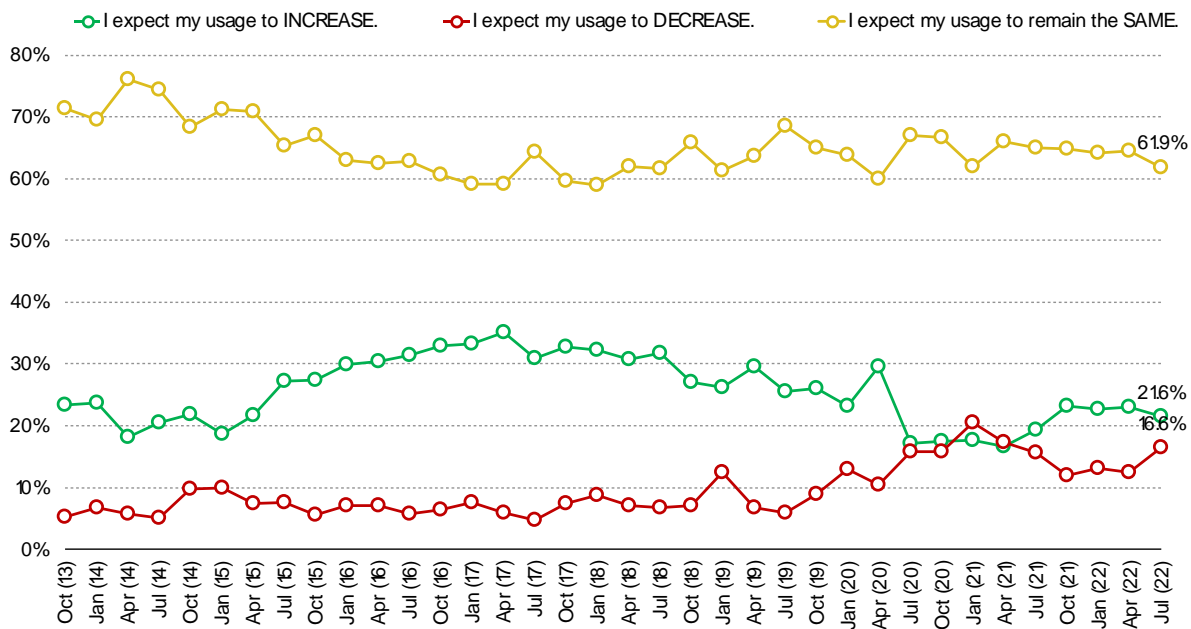
**AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?**



AMAZON USERS – RECENT USAGE

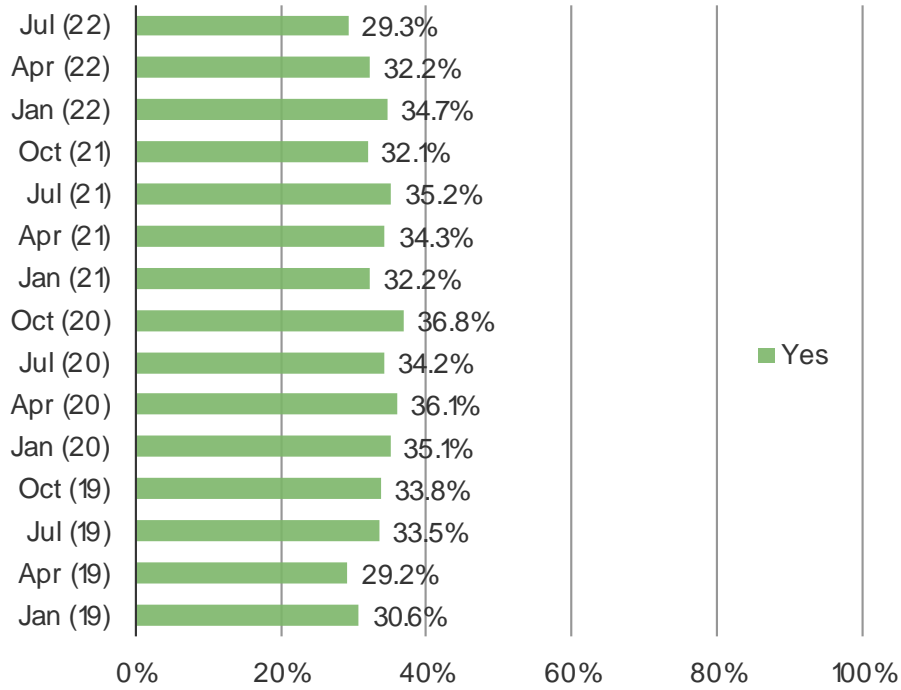


AMAZON USERS – EXPECTED USAGE

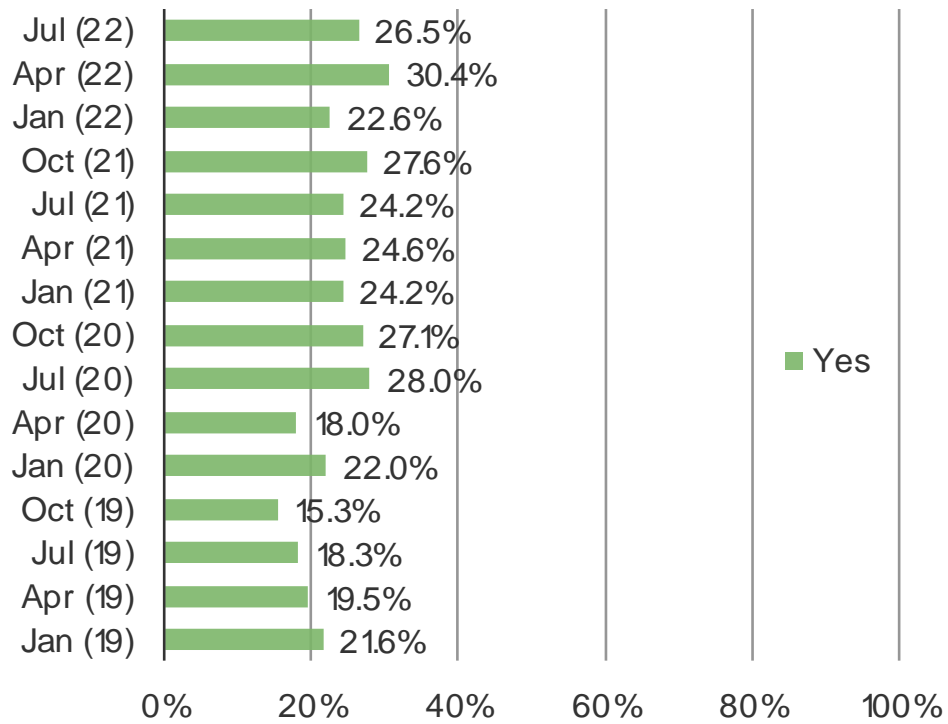


# WAYFAIR TRENDS

ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?

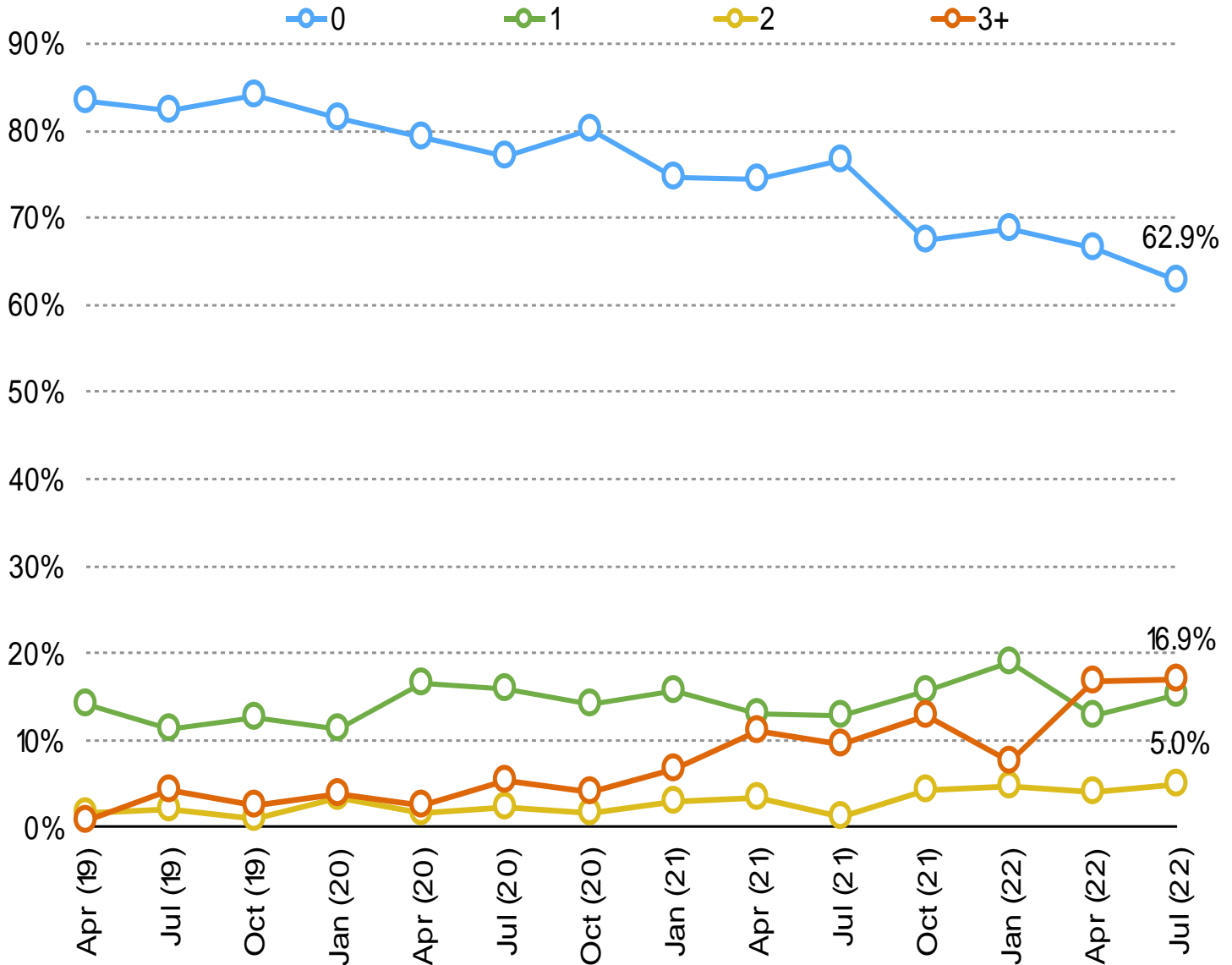


WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?

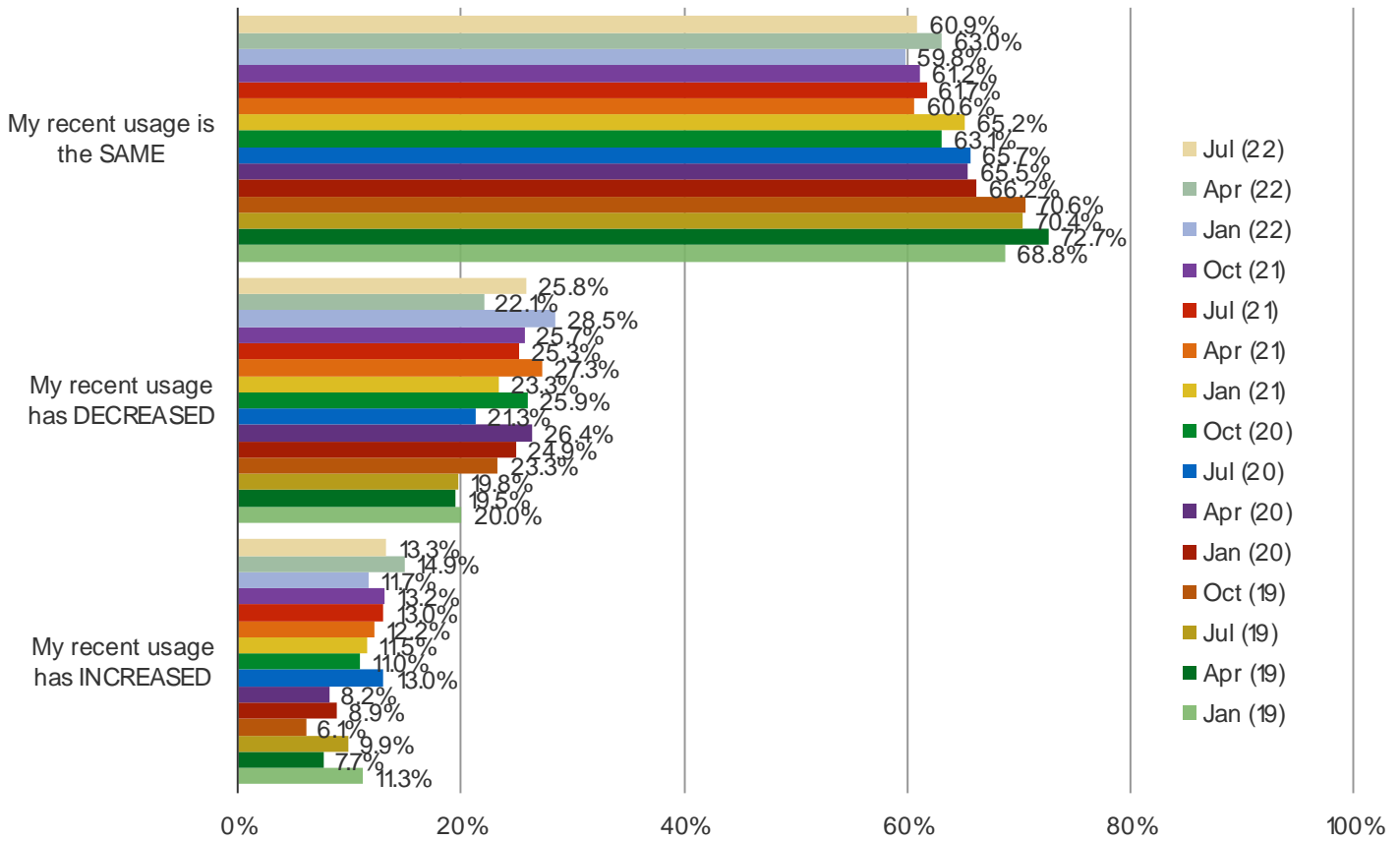




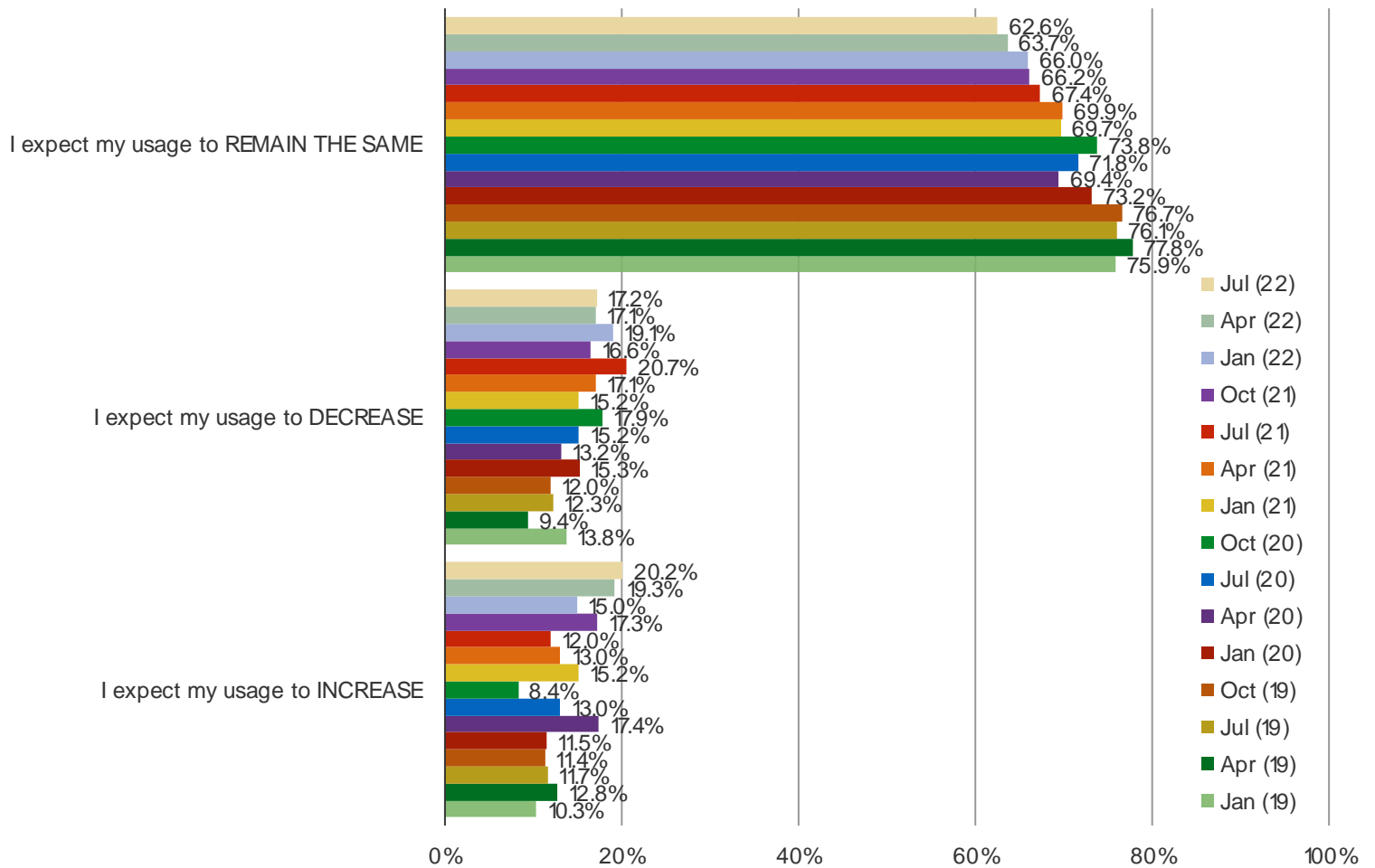
ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



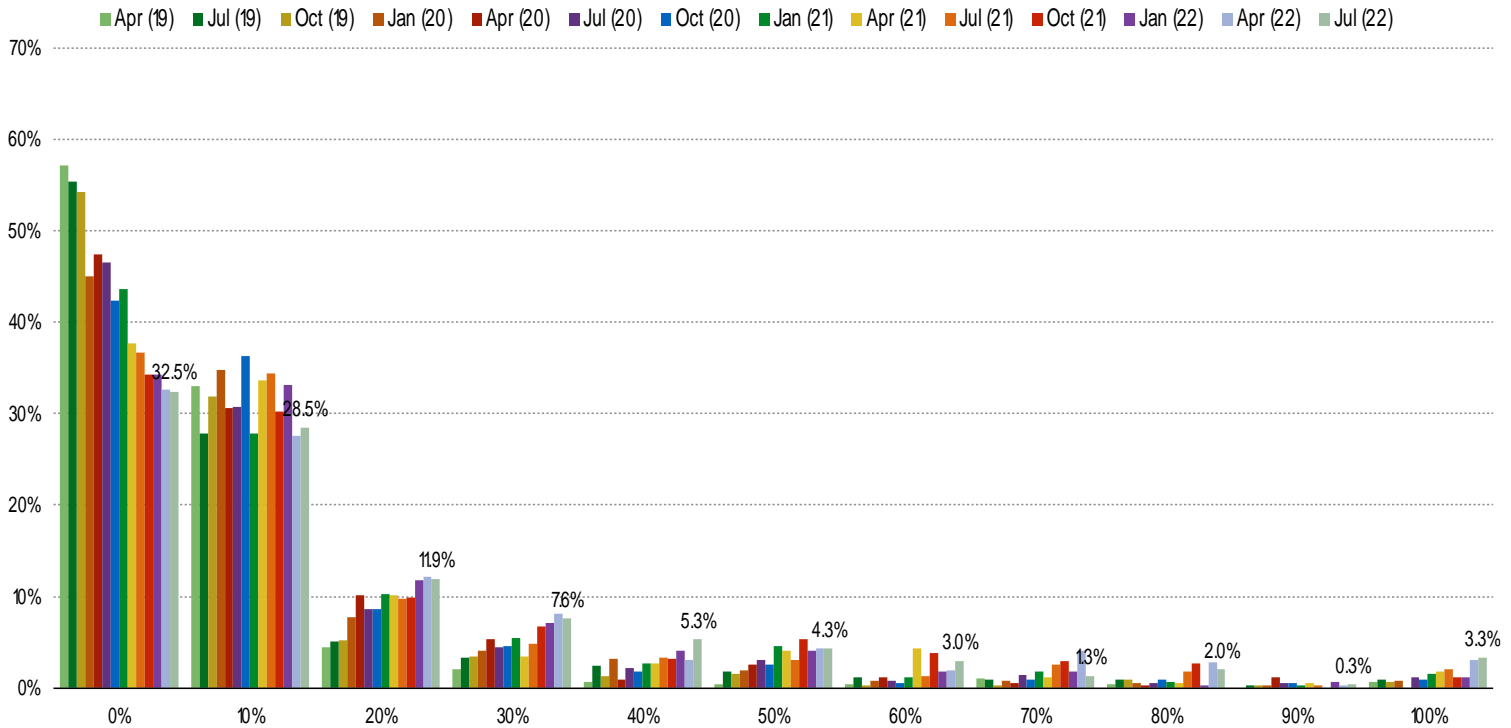
WAYFAIR USERS – RECENT USAGE



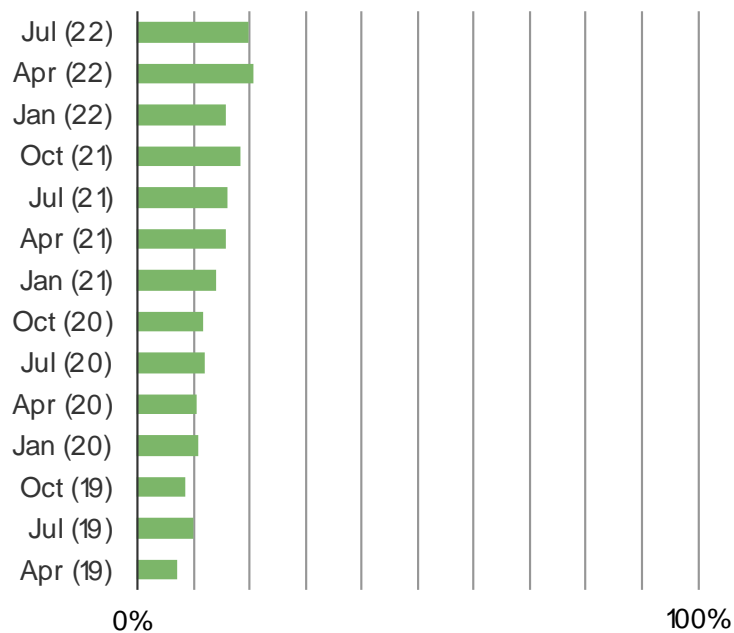
WAYFAIR USERS – EXPECTED USAGE



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

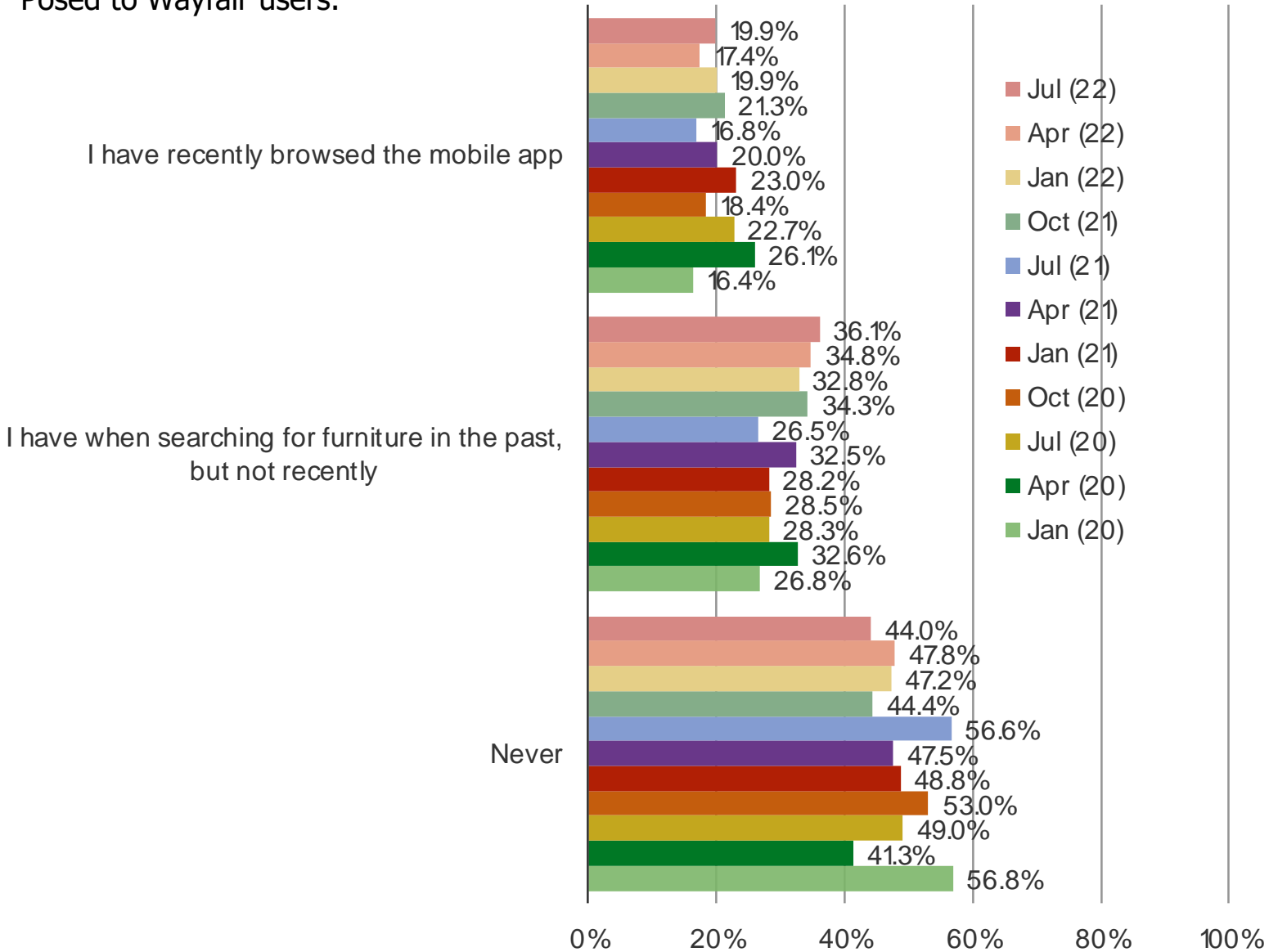


Weighted Average of Chart Above:



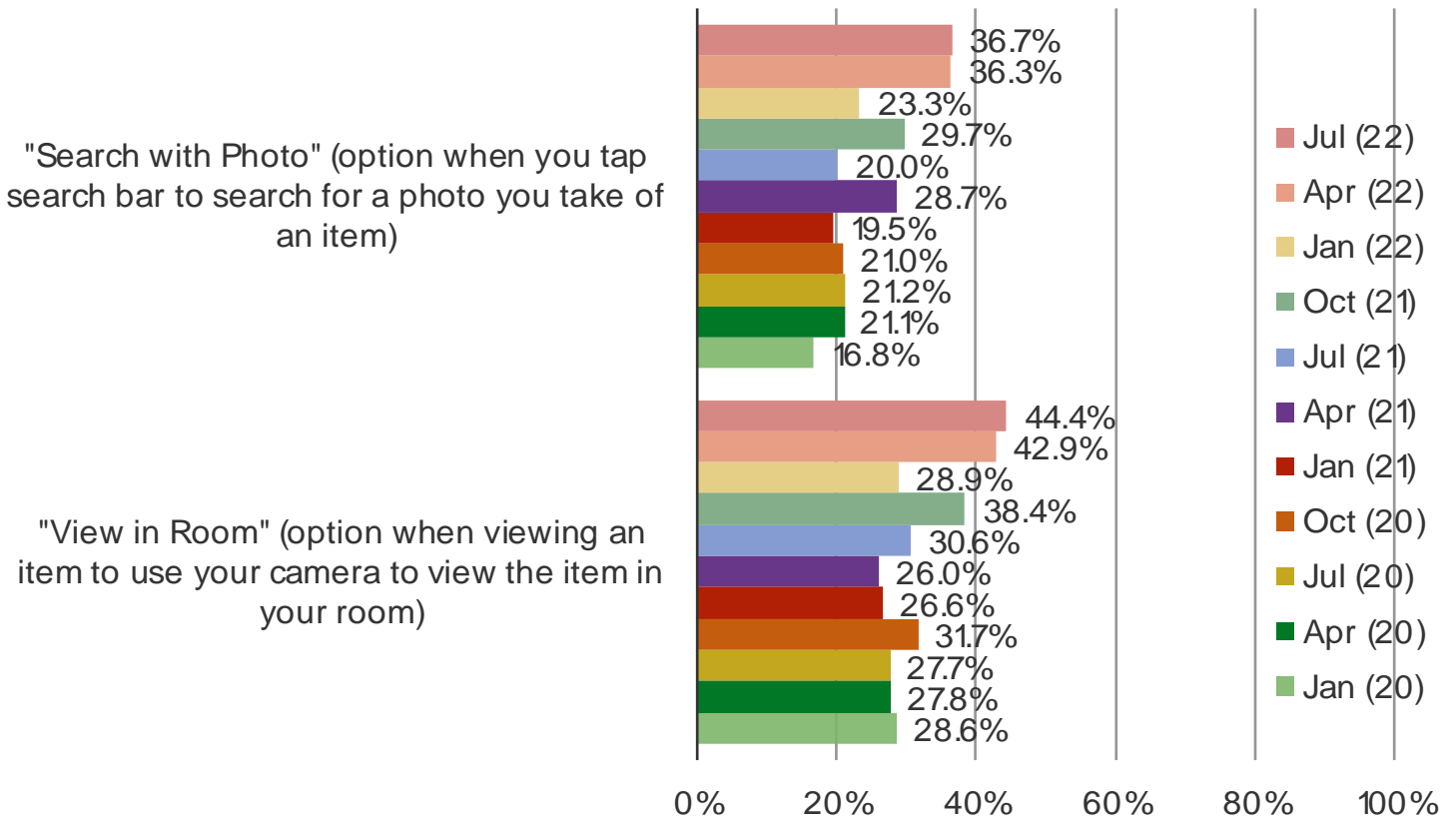
HAVE YOU EVER BROWSED THE WAYFAIR MOBILE APP FOR ITEMS?

Posed to Wayfair users.



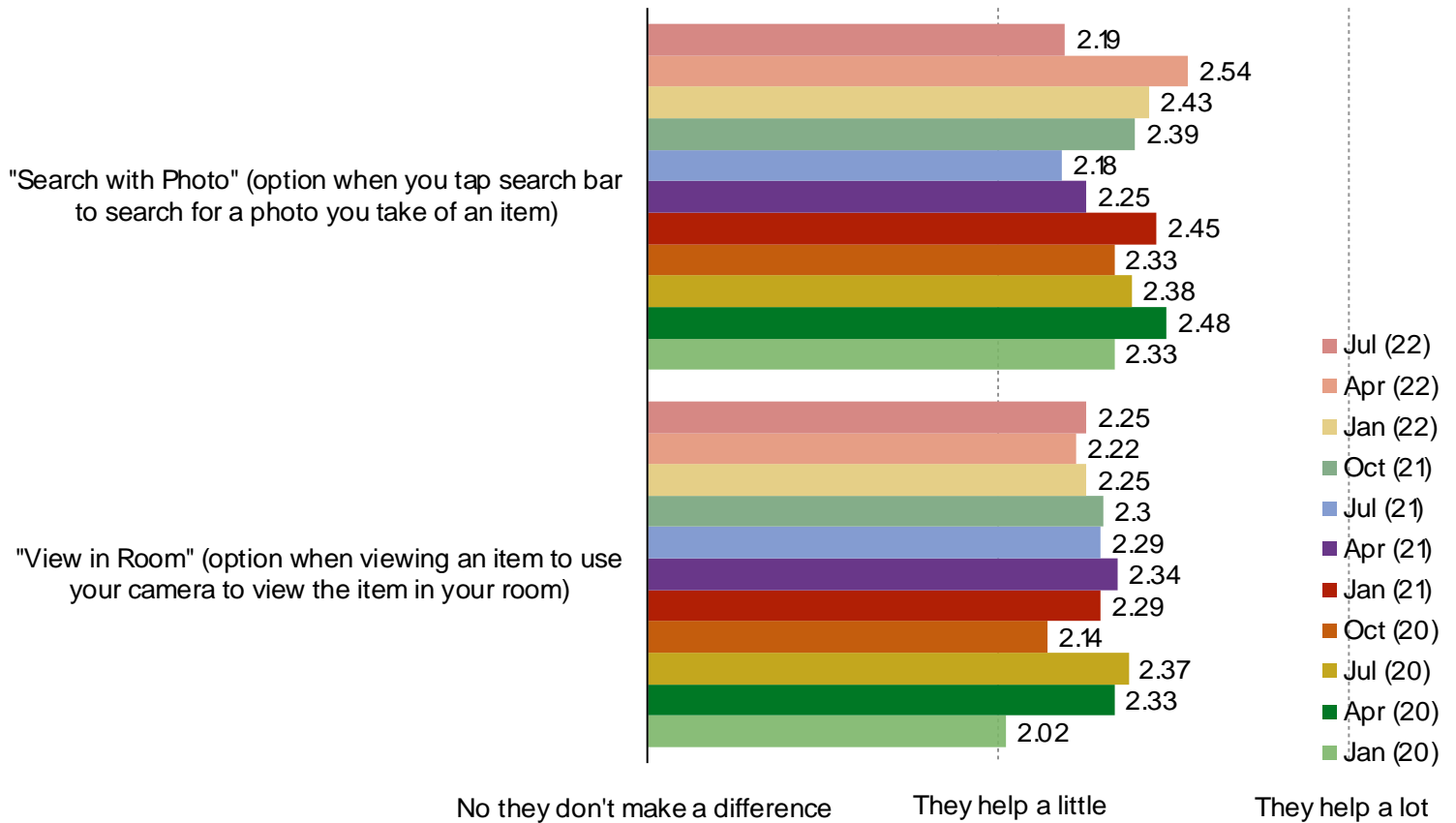
HAVE YOU USED ANY OF THE FOLLOWING FEATURES WHILE BROWSING WAYFAIR?

Posed to Wayfair users who have browsed the mobile app.



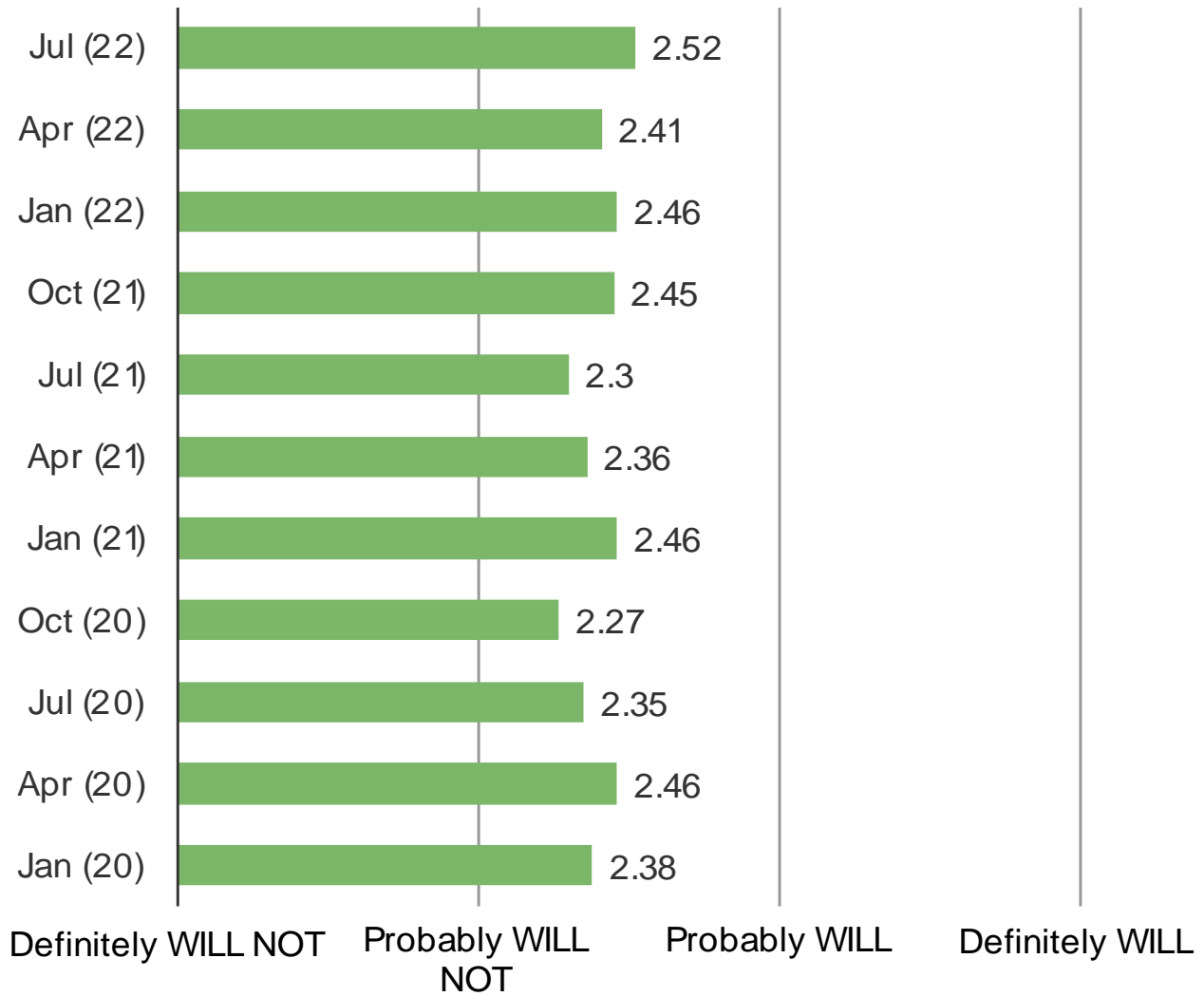
DO THESE FEATURES IMPROVE THE SEARCH AND EVALUATION OF PRODUCTS WHEN FURNITURE SHOPPING ONLINE?

Posed to Wayfair users who have used the following features.



HOW LIKELY ARE YOU TO USE WAYFAIR FOR YOUR NEXT FURNITURE PURCHASE?

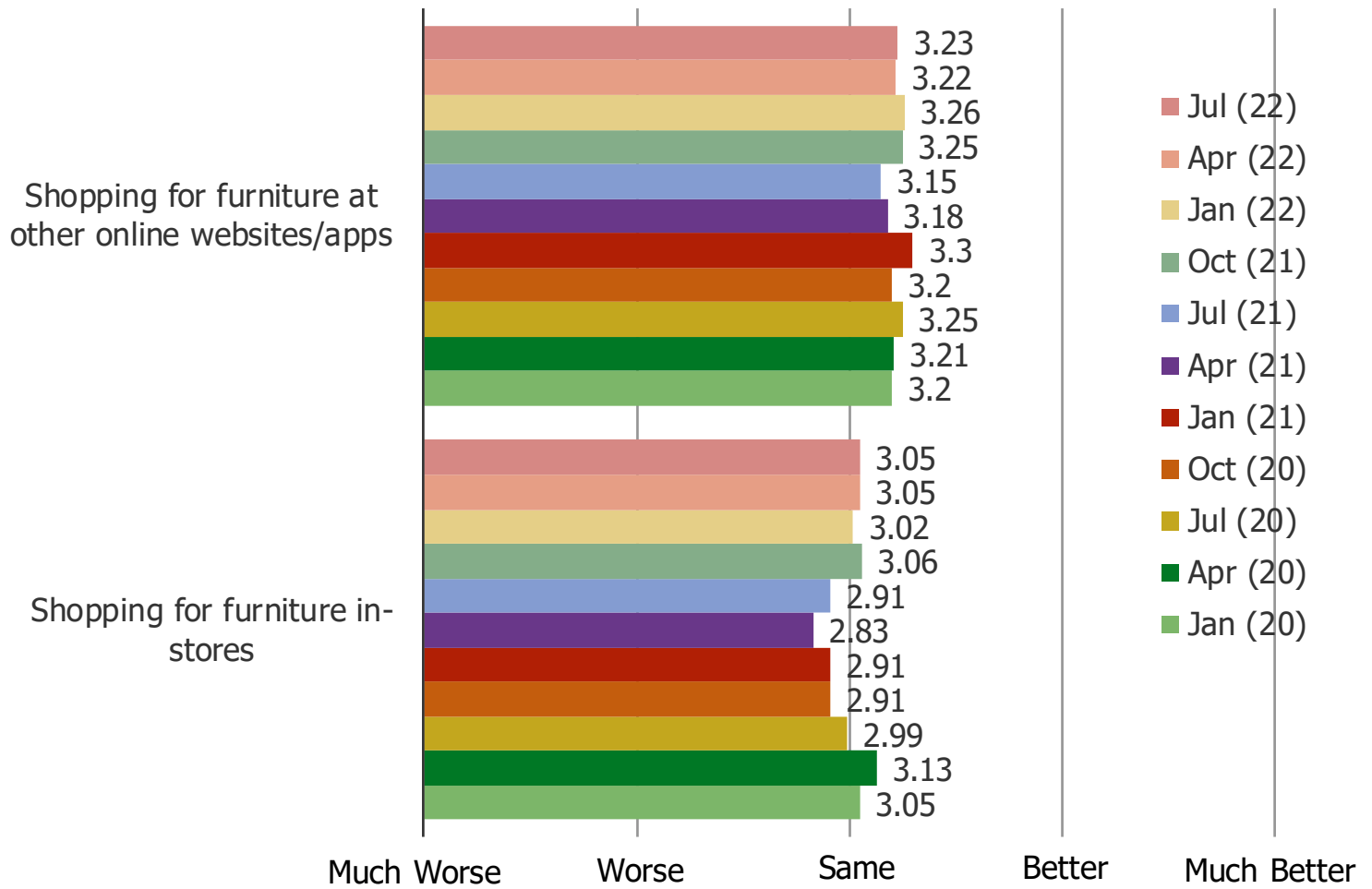
Posed to Wayfair users.





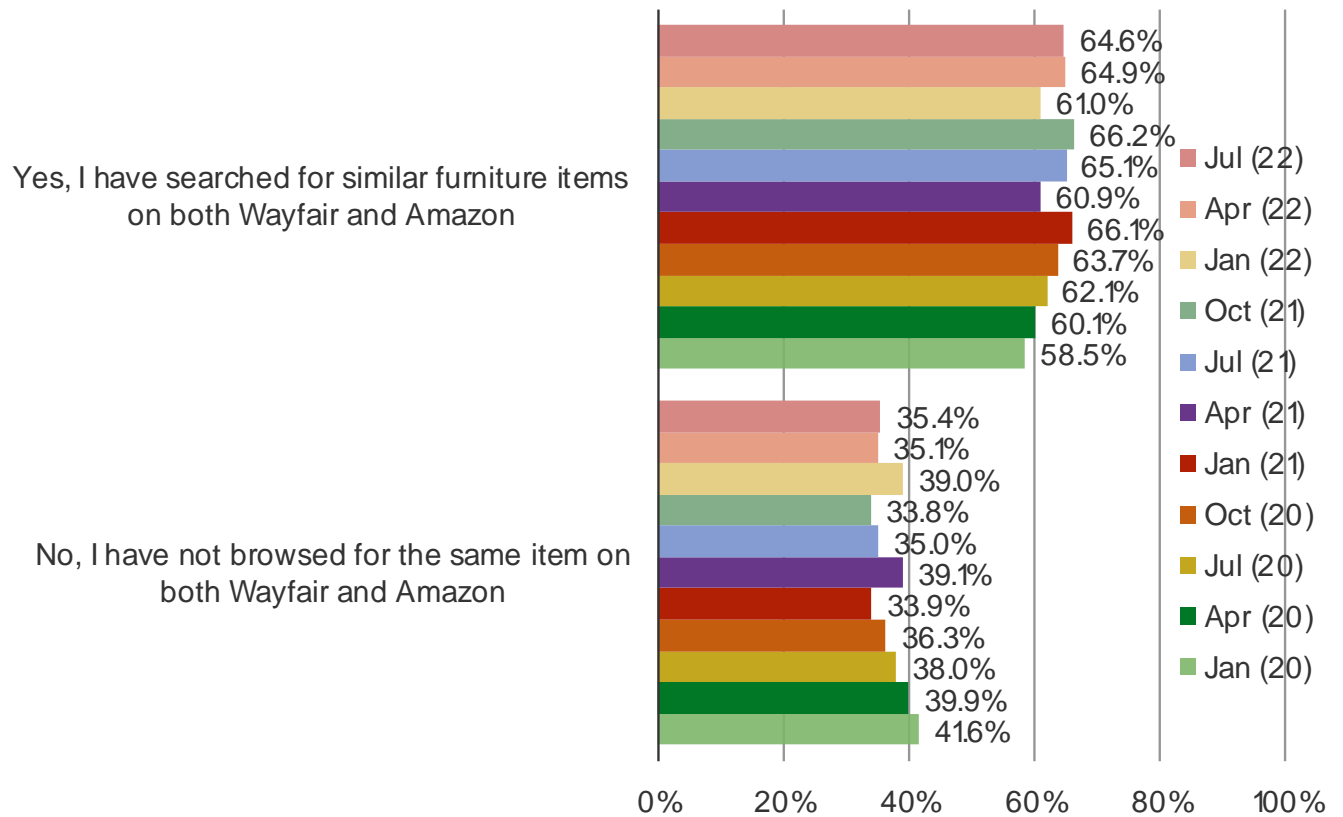
HOW DOES THE WAYFAIR SHOPPING EXPERIENCE COMPARE TO...

Posed to Wayfair users.



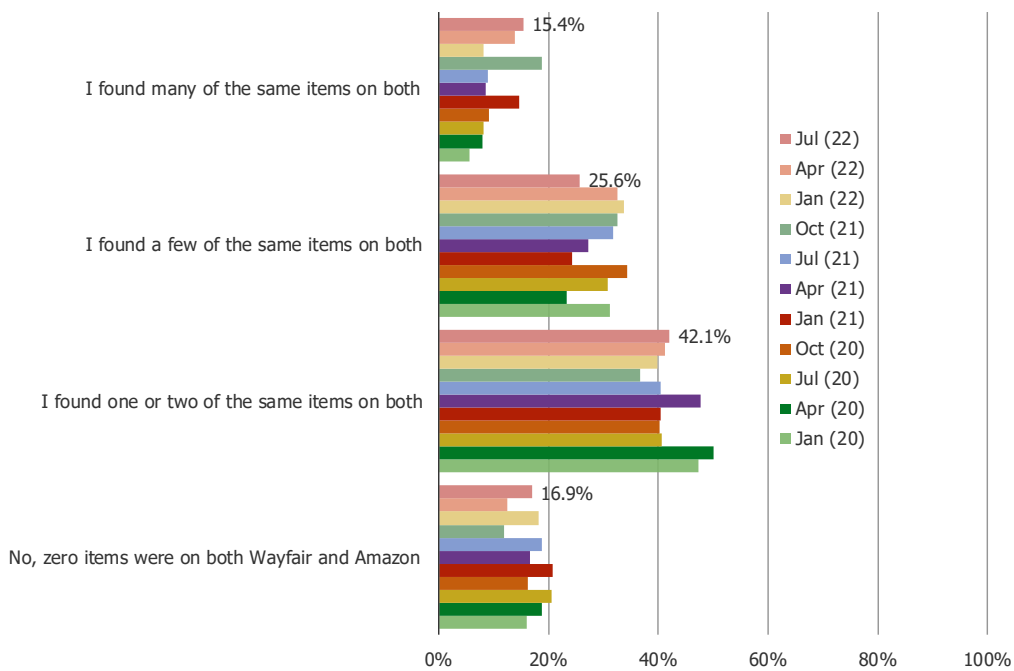
HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.



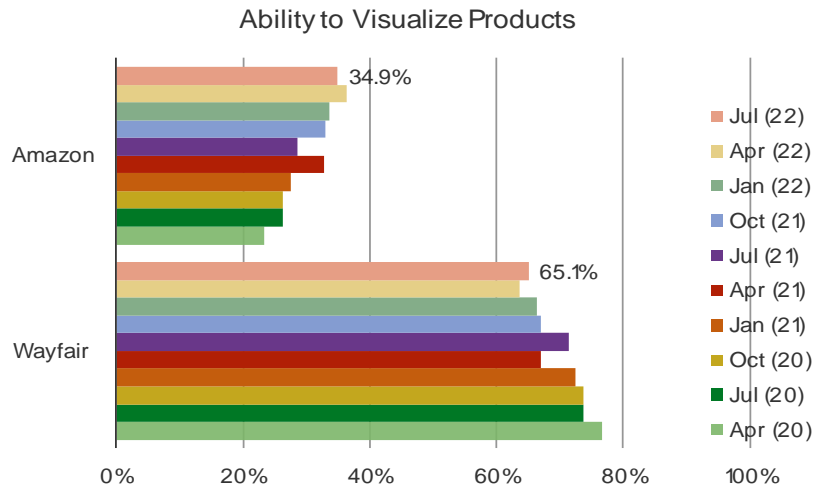
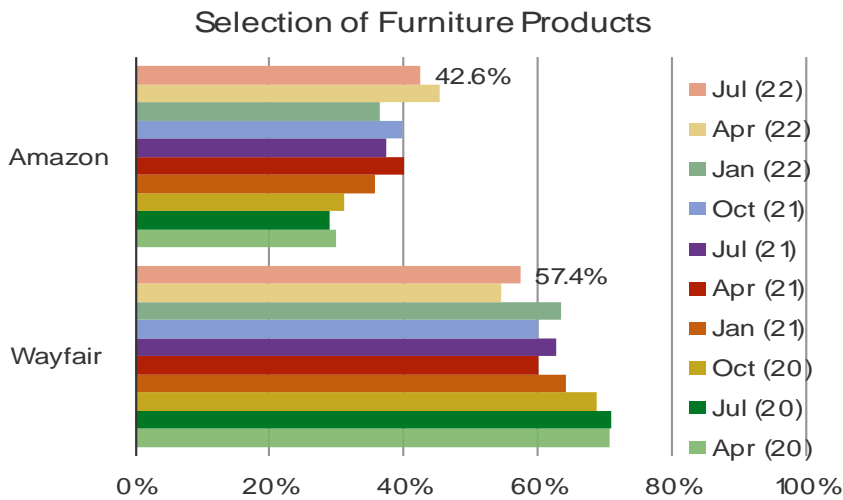
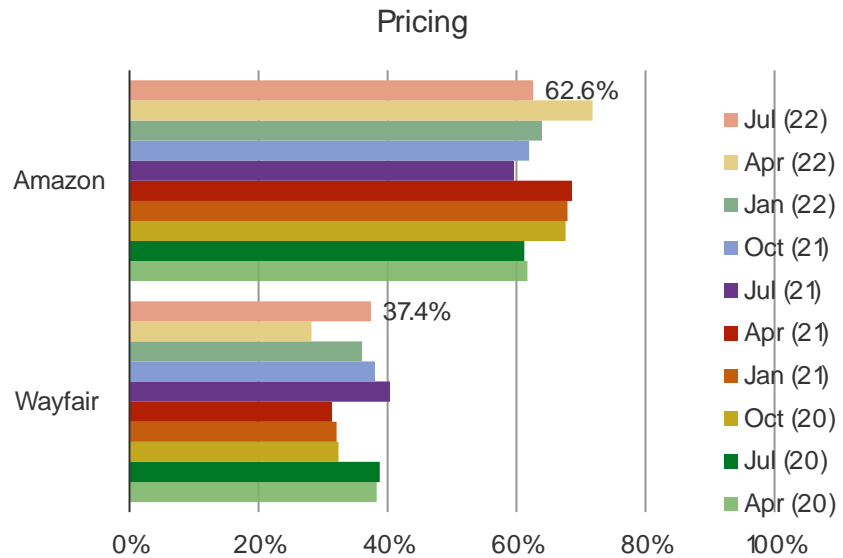
IN THE COURSE OF YOUR SEARCH, DID YOU FIND ANY ITEMS THAT WERE IDENTICAL AND LISTED ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users who have browsed for the same type of furniture product on both Wayfair AND Amazon.



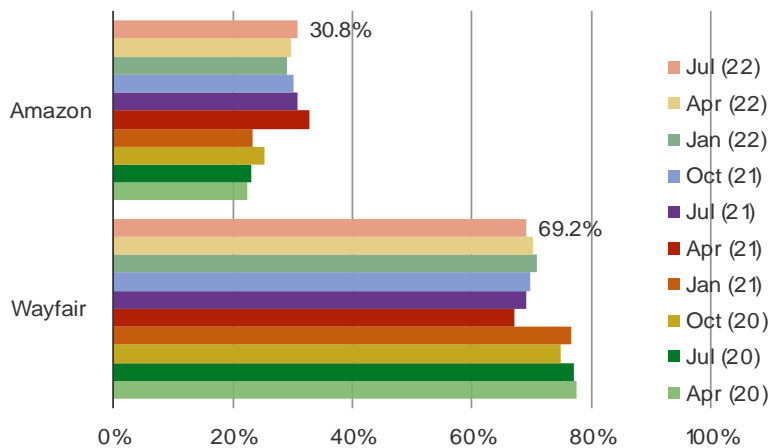
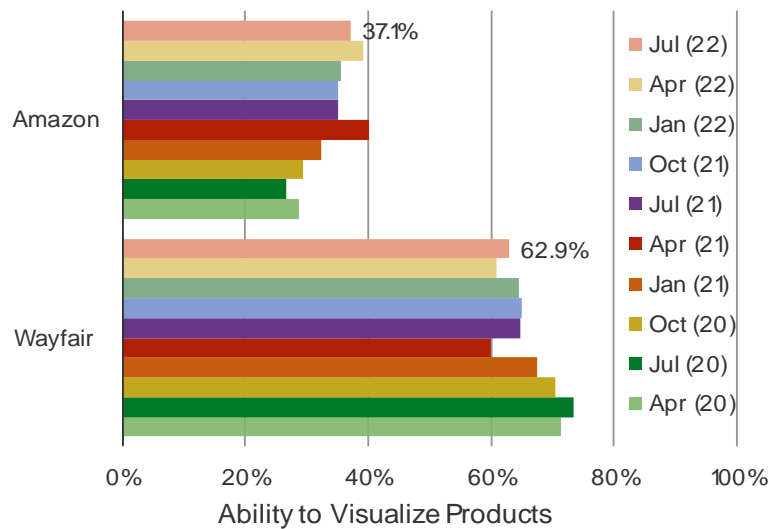
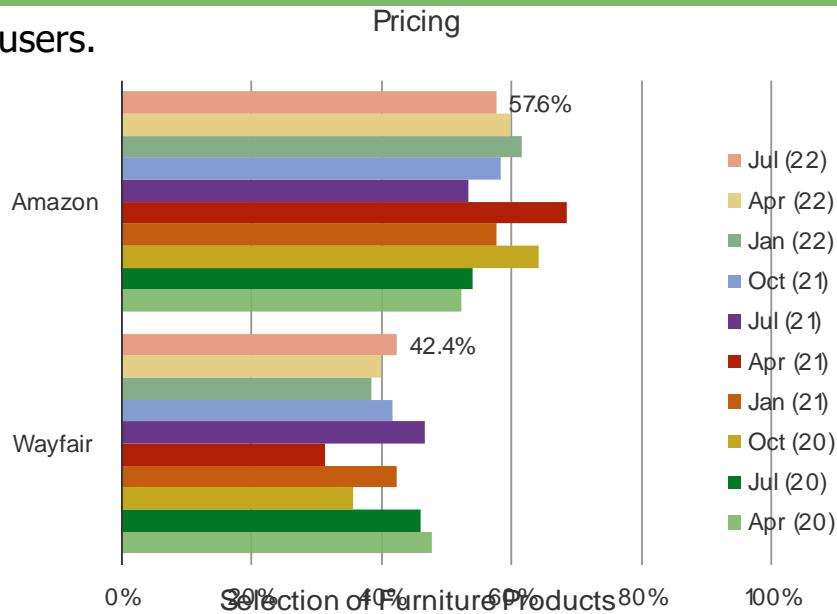
WHEN YOU WERE SHOPPING FOR THE SAME FURNITURE CATEGORY ON BOTH WAYFAIR AND AMAZON, WHICH PLATFORM HAD BETTER...

Posed to Wayfair users who have browsed for the same type of furniture product on both Wayfair AND Amazon.



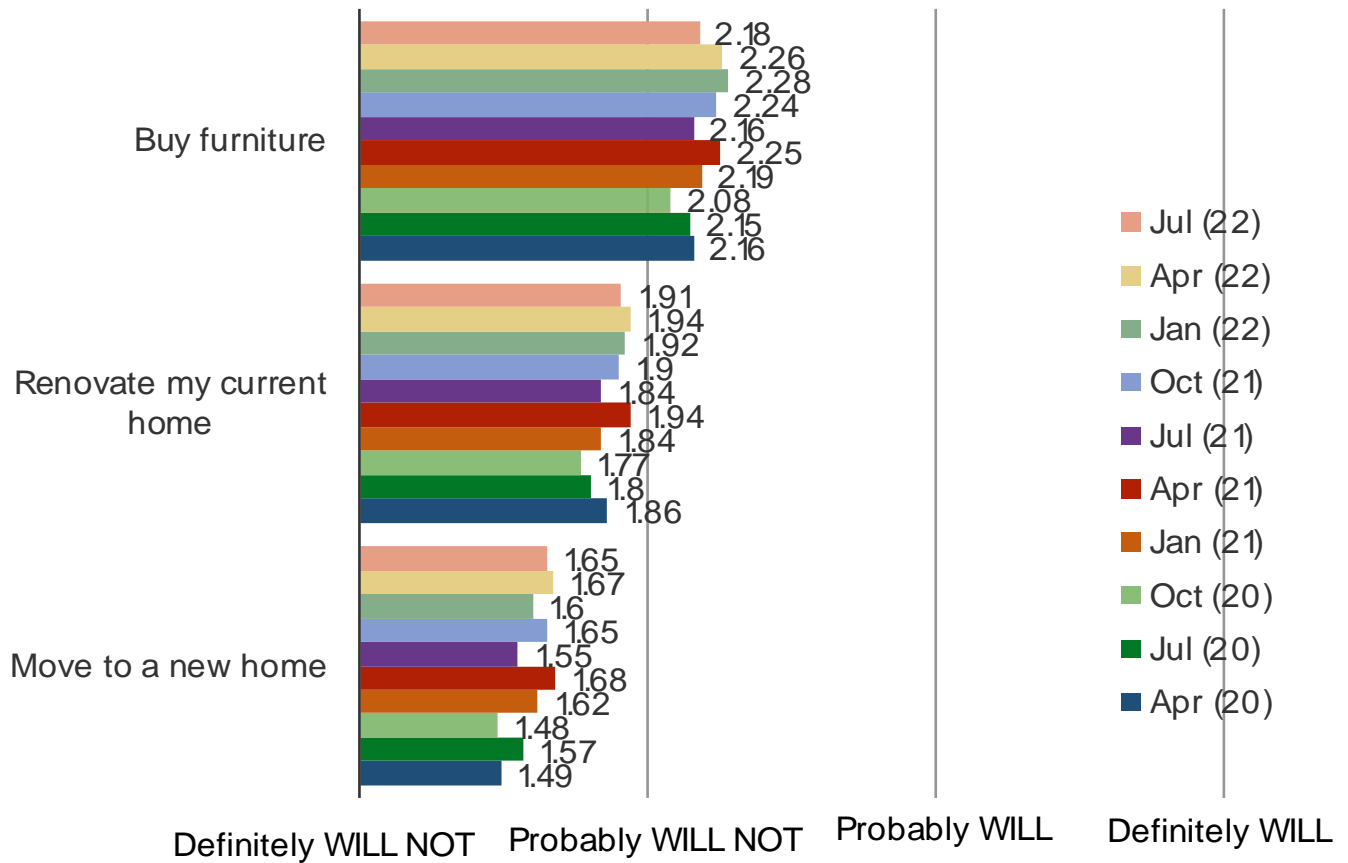
IF YOU NEEDED TO SHOP FOR A TYPE OF FURNITURE TODAY, WHICH PLATFORM DO YOU THINK WOULD HAVE BETTER...

Posed to ALL Wayfair users.



DO YOU PLAN TO DO ANY OF THE FOLLOWING IN THE NEXT FEW MONTHS?

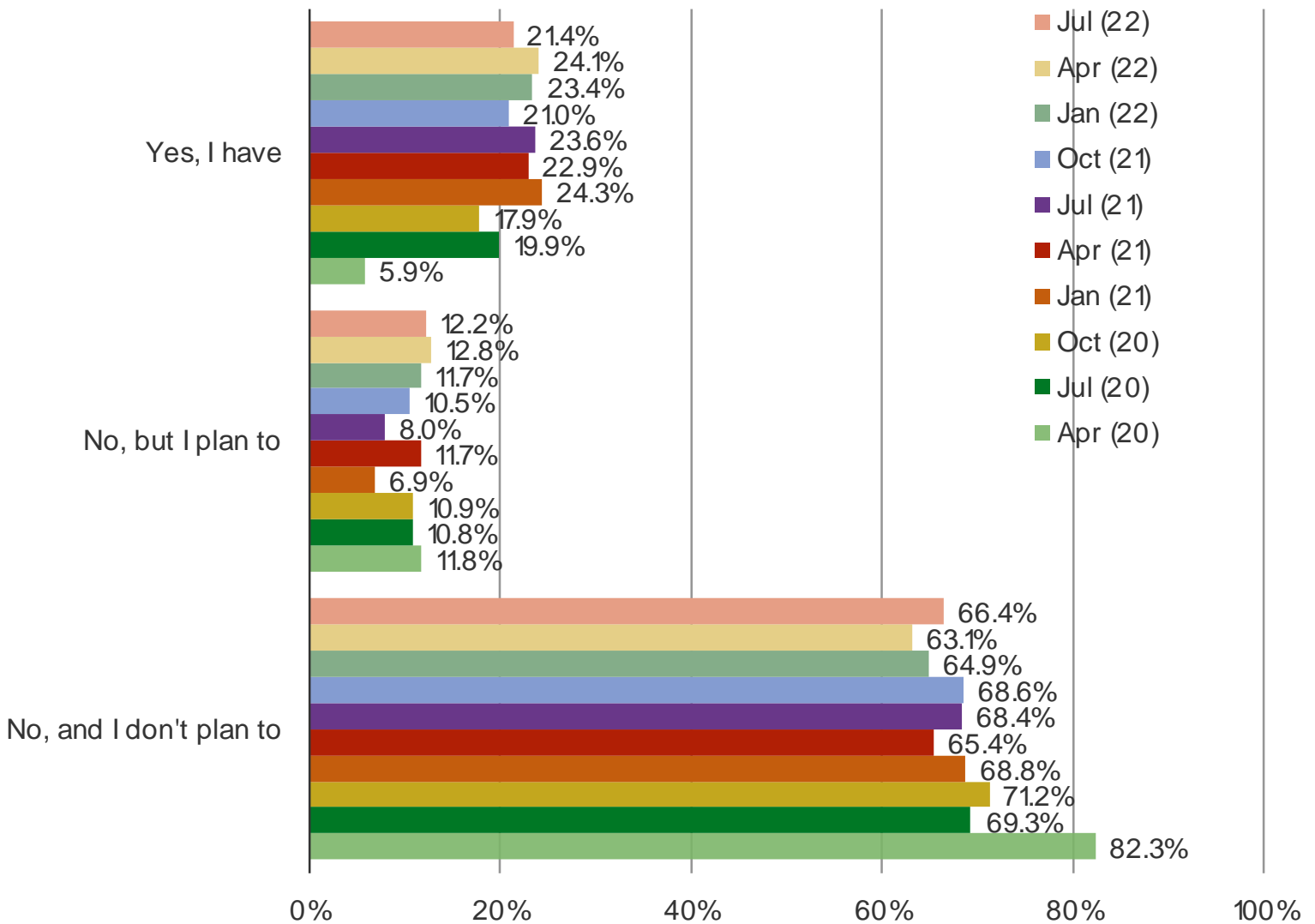
Posed to ALL respondents.



## ETSY TRENDS

HAVE YOU PURCHASED ANY MASKS / PROTECTIVE FACE MASKS ON ETSY IN THE PAST MONTH OR TWO?

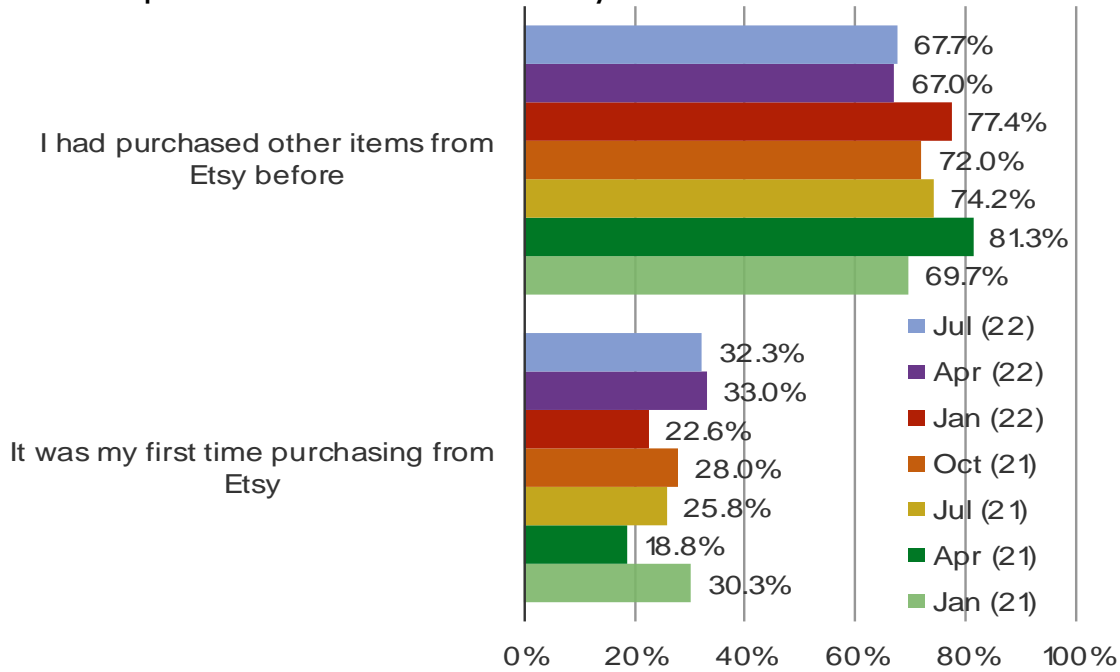
Posed to Etsy users.





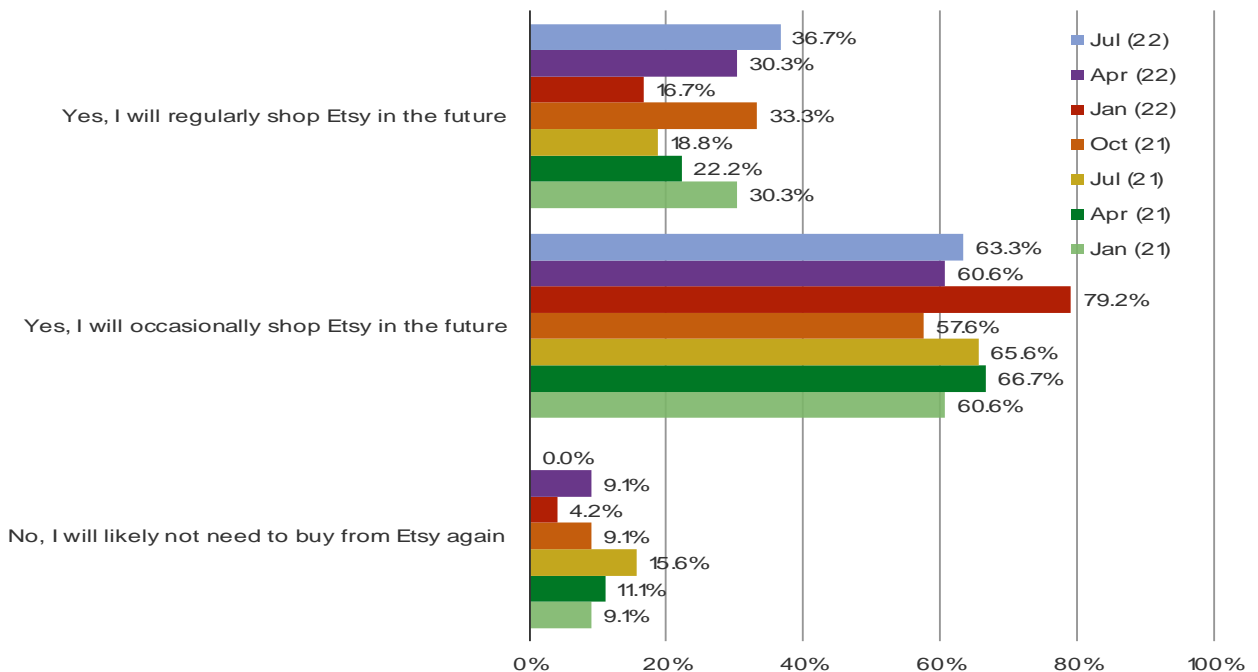
THINKING ABOUT YOUR MASK PURCHASE FROM ETSY, WAS IT YOUR FIRST TIME PURCHASING AN ITEM FROM ETSY OR HAD YOU ALREADY PURCHASED OTHER ITEMS FROM ETSY BEFORE?

Posed to users who purchased a mask from Etsy.

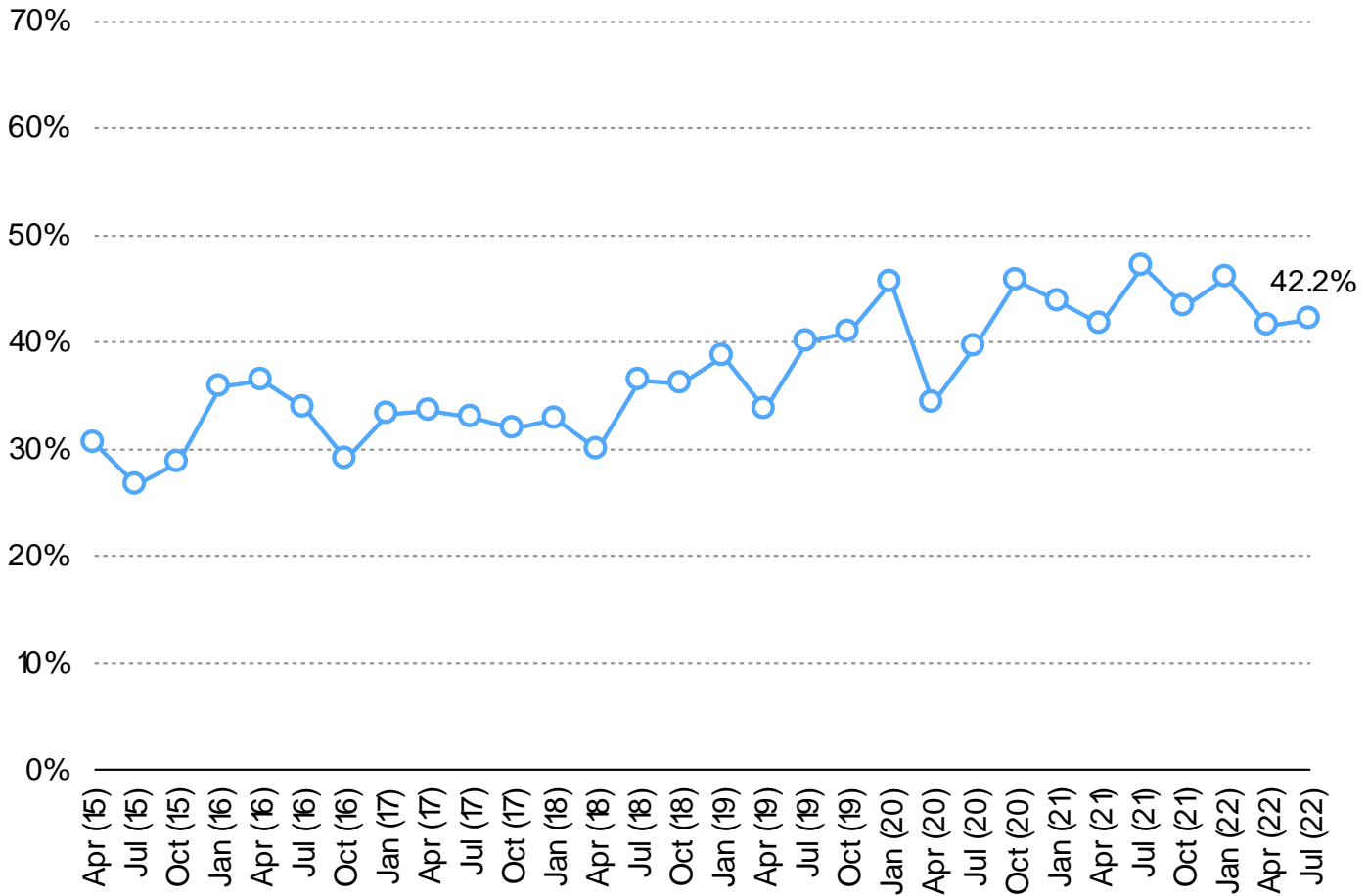


DO YOU EXPECT TO CONTINUE SHOPPING FOR PRODUCTS ON ETSY IN THE FUTURE?

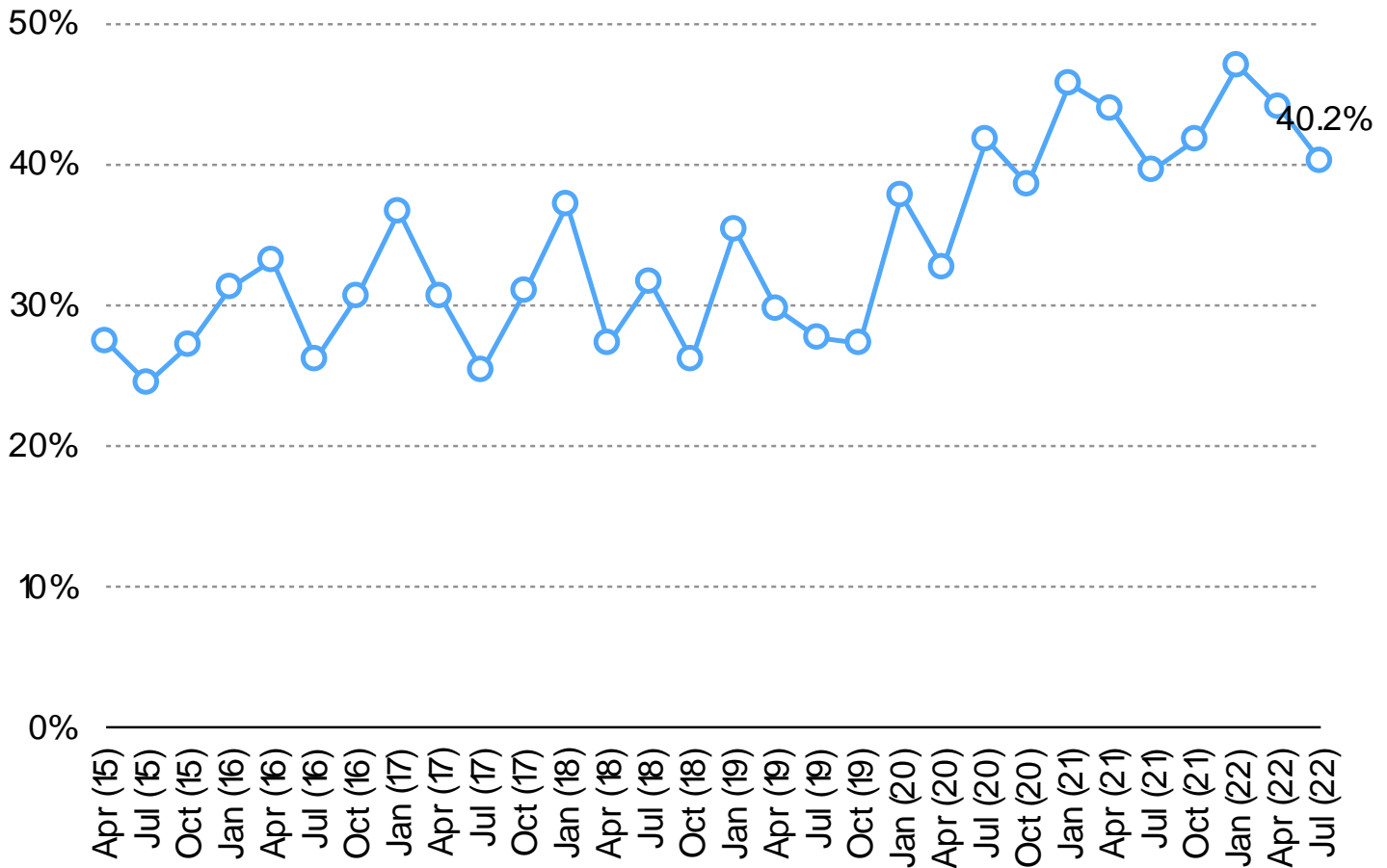
Posed to users whose first purchase from Etsy was a mask.



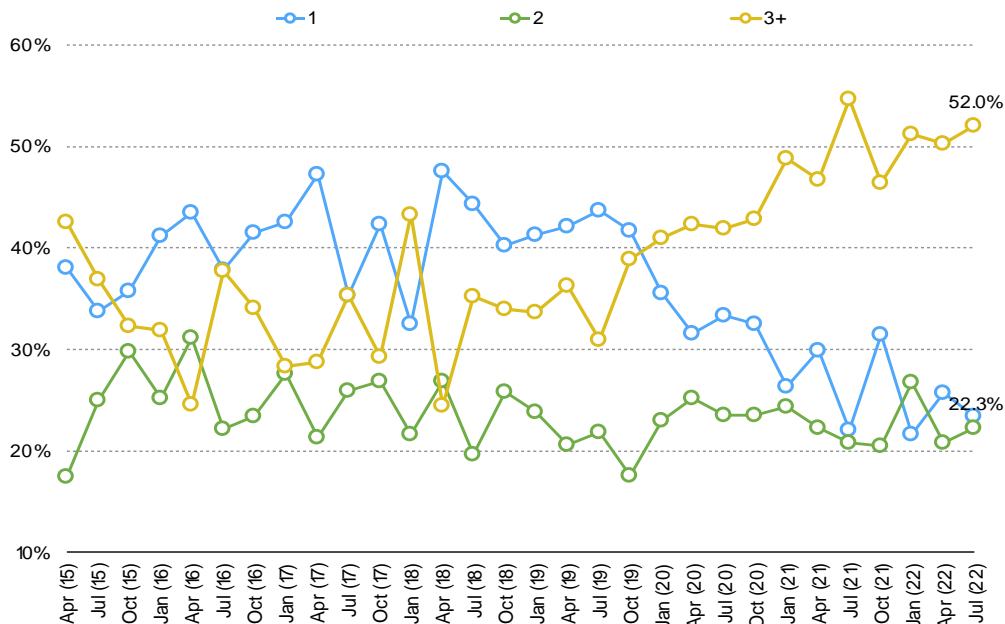
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



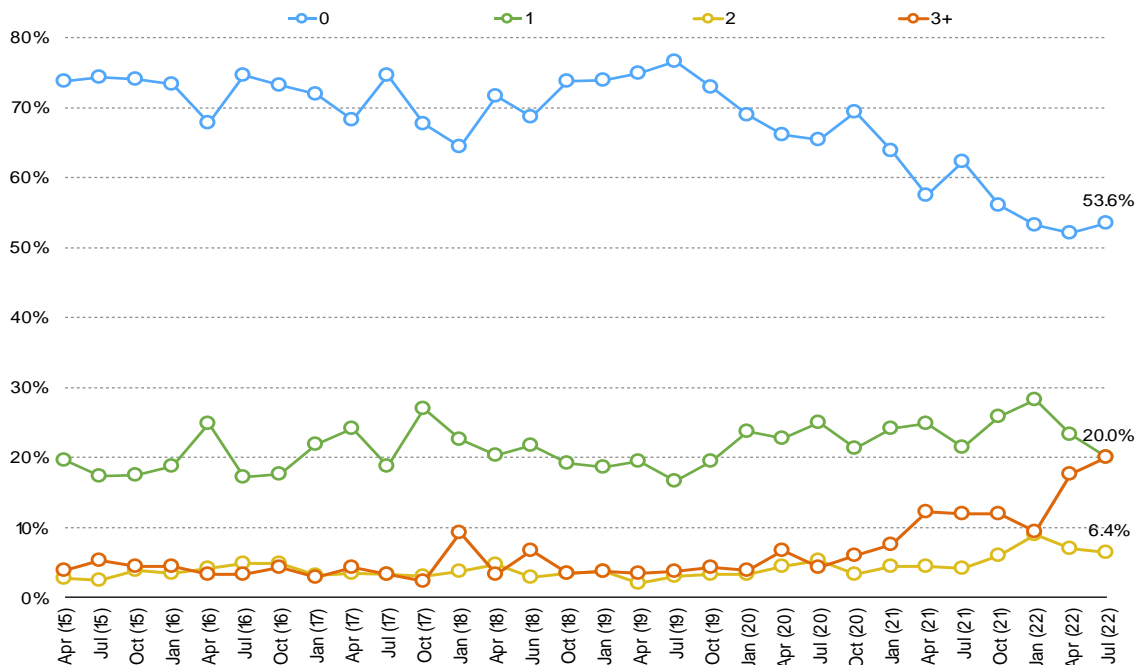
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



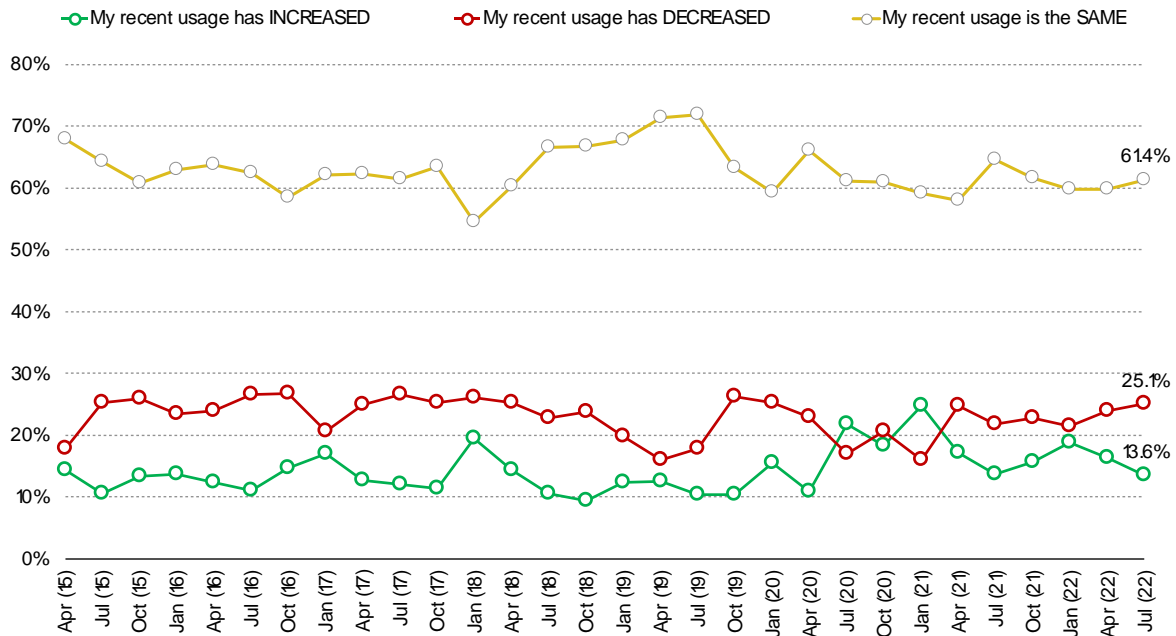
**PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?**



**ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH**



ETSY USERS – RECENT USAGE



ETSY USERS – EXPECTED USAGE

