

BESPOKE SURVEYS

Online Retailers US Vol 39

1000+ US Consumers Balanced to Census

CHECK BREAKDOWN:**SPENDING CONFIDENCE**

Confidence in spending money continues to deteriorate from pandemic highs.

HOLIDAY SHOPPING

When asked about the upcoming holiday shopping season, consumers noted that they expect to spend the same to less relative to last year. Consumers also expect to start their holiday shopping around roughly the same time as last year. By channel, consumers expect their mix of online vs offline shopping to look very similar relative to last year. Lastly, consumers did point to a more pronounced pullback in spend of higher priced items relative to moderately priced and lower priced goods this year.

PLATFORM SPECIFIC NOTES

Wayfair | The share of Wayfair users who have purchased from Wayfair in the past three months declined q/q once again. We continue to see cross shopping with Amazon but the trend has been more flat of late. While cross-shoppers have always thought Amazon is better when it comes to pricing, the share of cross-shoppers saying Amazon is better for selection and visualization has been increasing.

Etsy | Etsy engagement continues to soften when we look at purchases completed in the last three months.

Amazon | Amazon remains in the lead when it comes to customer shipping experience, purchase frequency, and customer loyalty. Though we would note some of the engagement trends in our survey have been moderating from pandemic highs.

ONLINE VS. IN-STORES

Consumers continue to view online shopping as a net popularity gainer.

AMAZON PRIME DAY

Amazon users suggest there will be a slight increase in the share of their holiday shopping that they allocate to Amazon with an extra Prime Day falling in October (especially with lower income users).

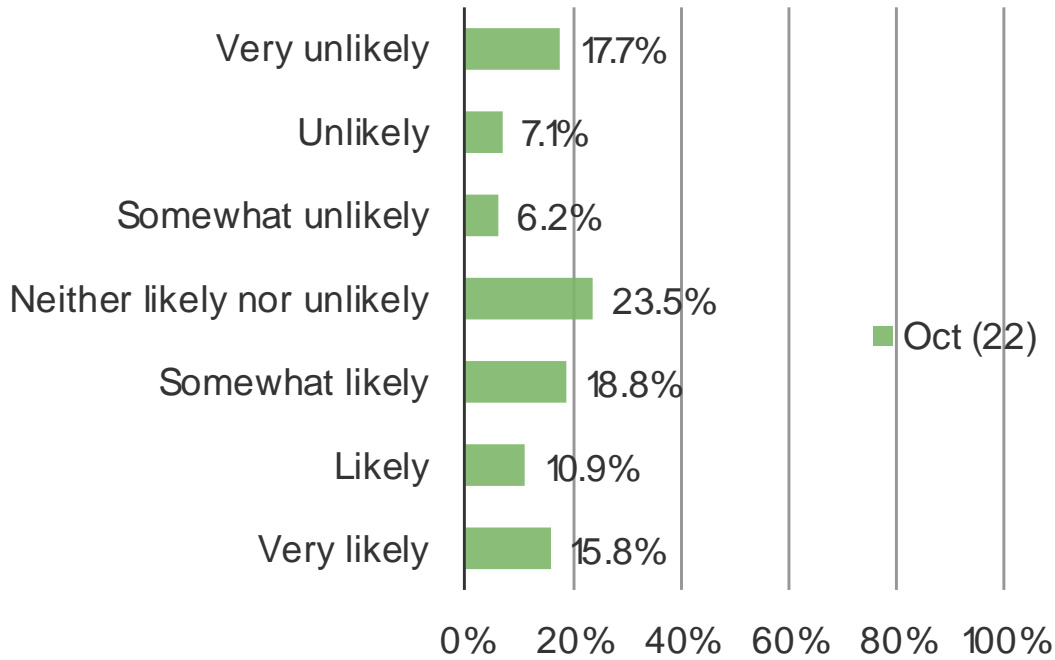
FURNITURE PURCHASING AND REMODELING INTENTIONS

The percentage of consumers looking to shop for furniture and looking to remodel/renovate their homes has been softening.

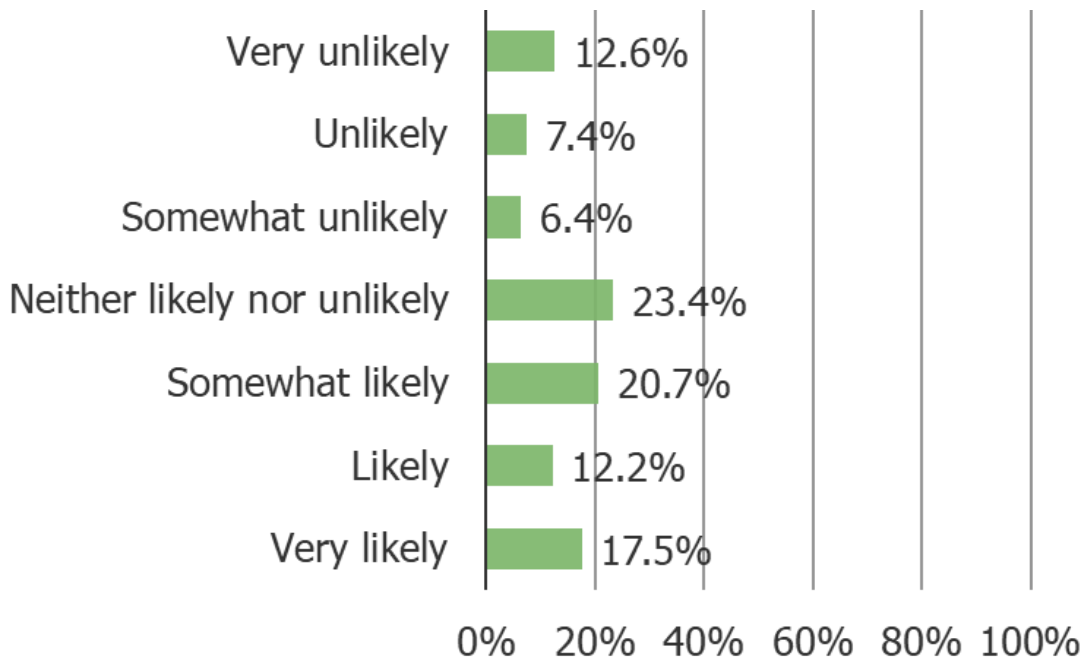
NEW QUESTIONS

HOW LIKELY ARE YOU TYPICALLY TO BUY ITEMS FROM AMAZON WHEN THEY HAVE AMAZON PRIME DAY?

Posed to all respondents.

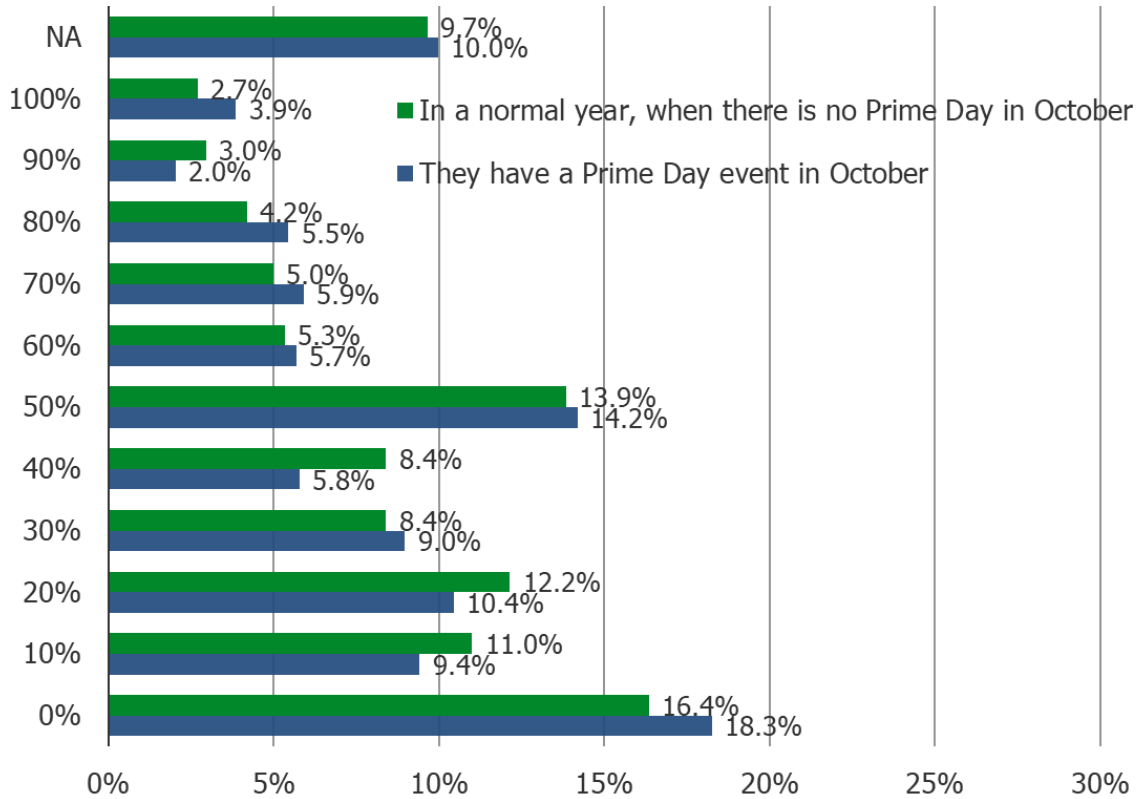


Posed to respondents who use Amazon regularly or occasionally.

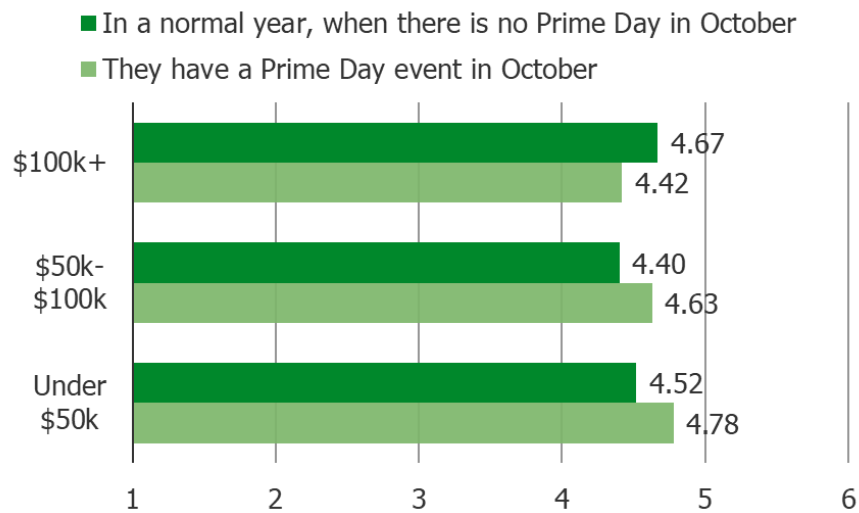


WHAT PERCENTAGE OF YOUR HOLIDAY SHOPPING WOULD GO THROUGH AMAZON THIS YEAR IF...

Posed to respondents who said they shop Amazon regularly or occasionally (N = 881)



Weighted average of Amazon customers cut by income, 11 point scale.
Ie – Prime Day in October more likely to drive increased holiday share among lower income.



DO YOU EXPECT TO START YOUR HOLIDAY SHOPPING THIS YEAR...

Posed to all respondents.

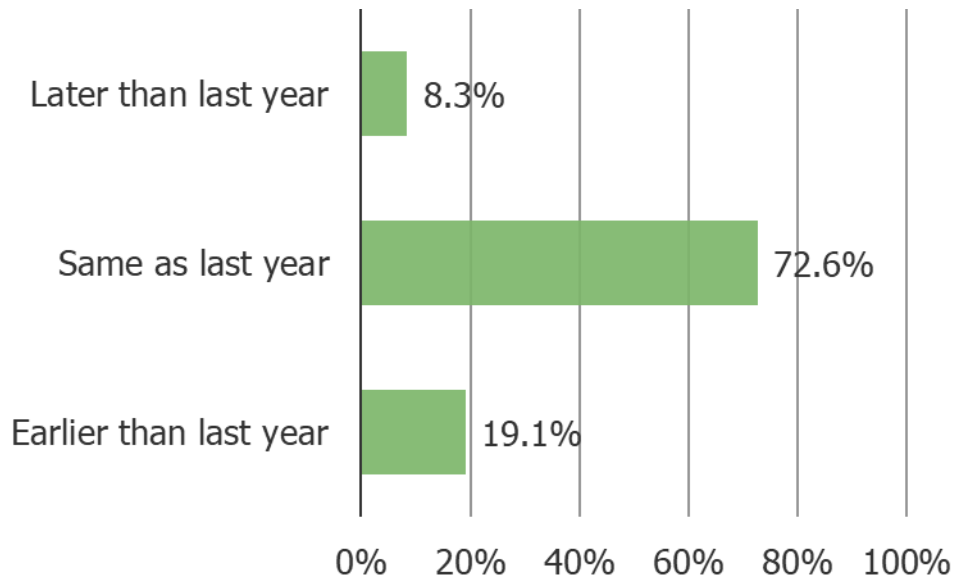
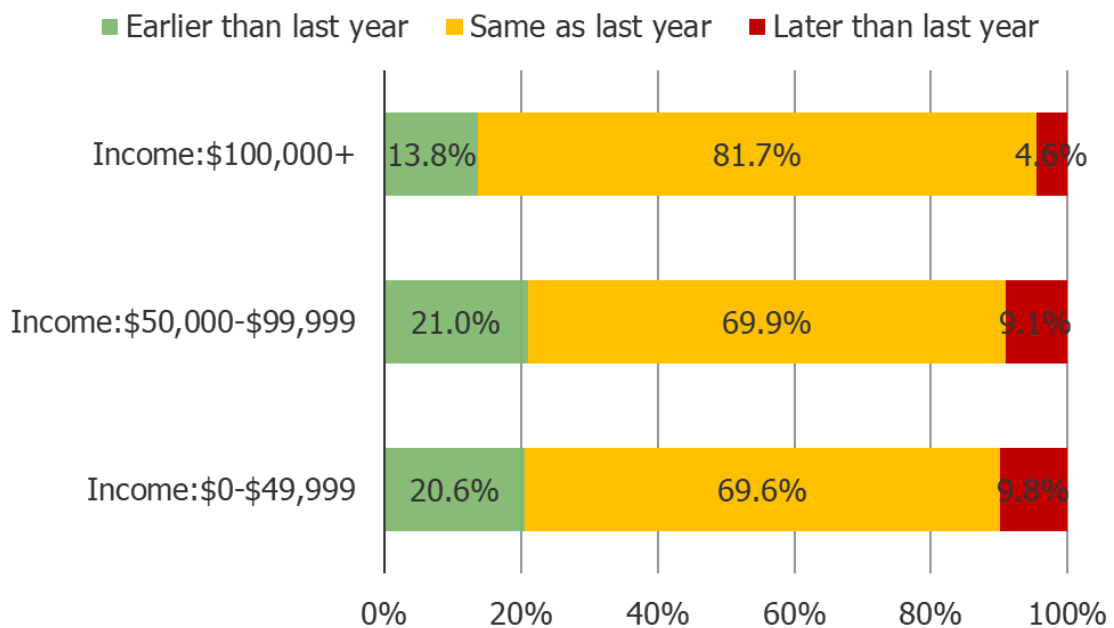


Chart above cut by income:



THINKING ABOUT YOUR HOLIDAY SHOPPING, DO YOU EXPECT TO SPEND MORE OR LESS THIS YEAR COMPARED TO LAST YEAR?

Posed to all respondents.

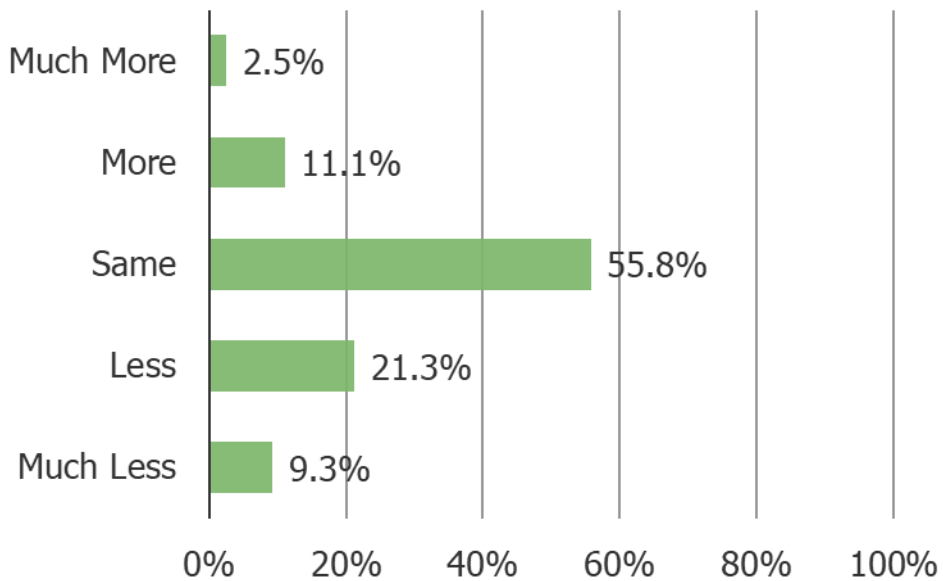
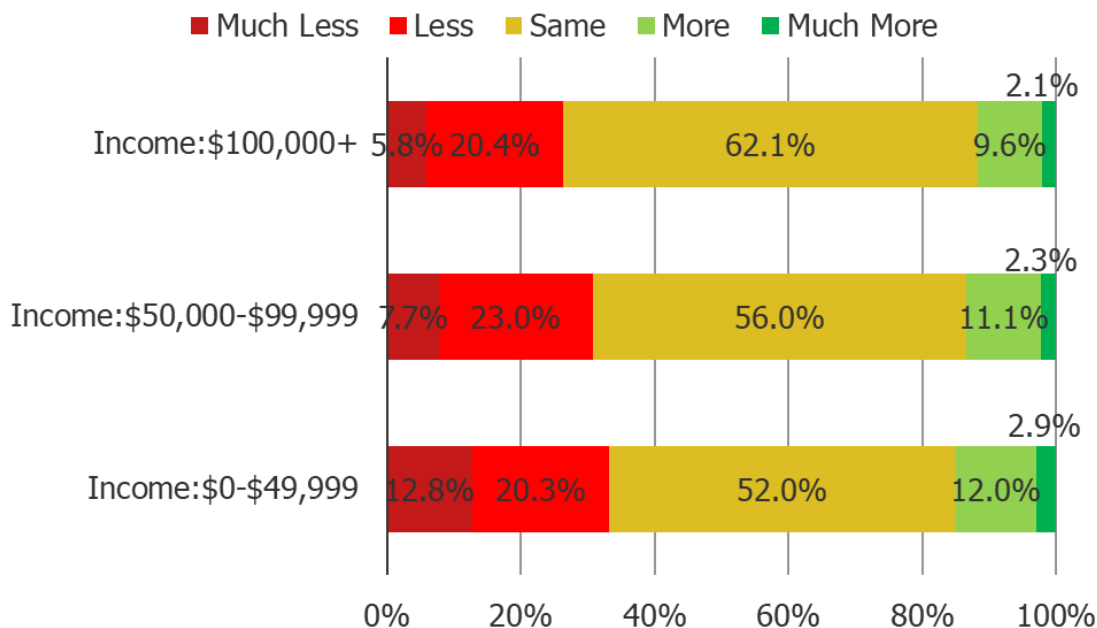
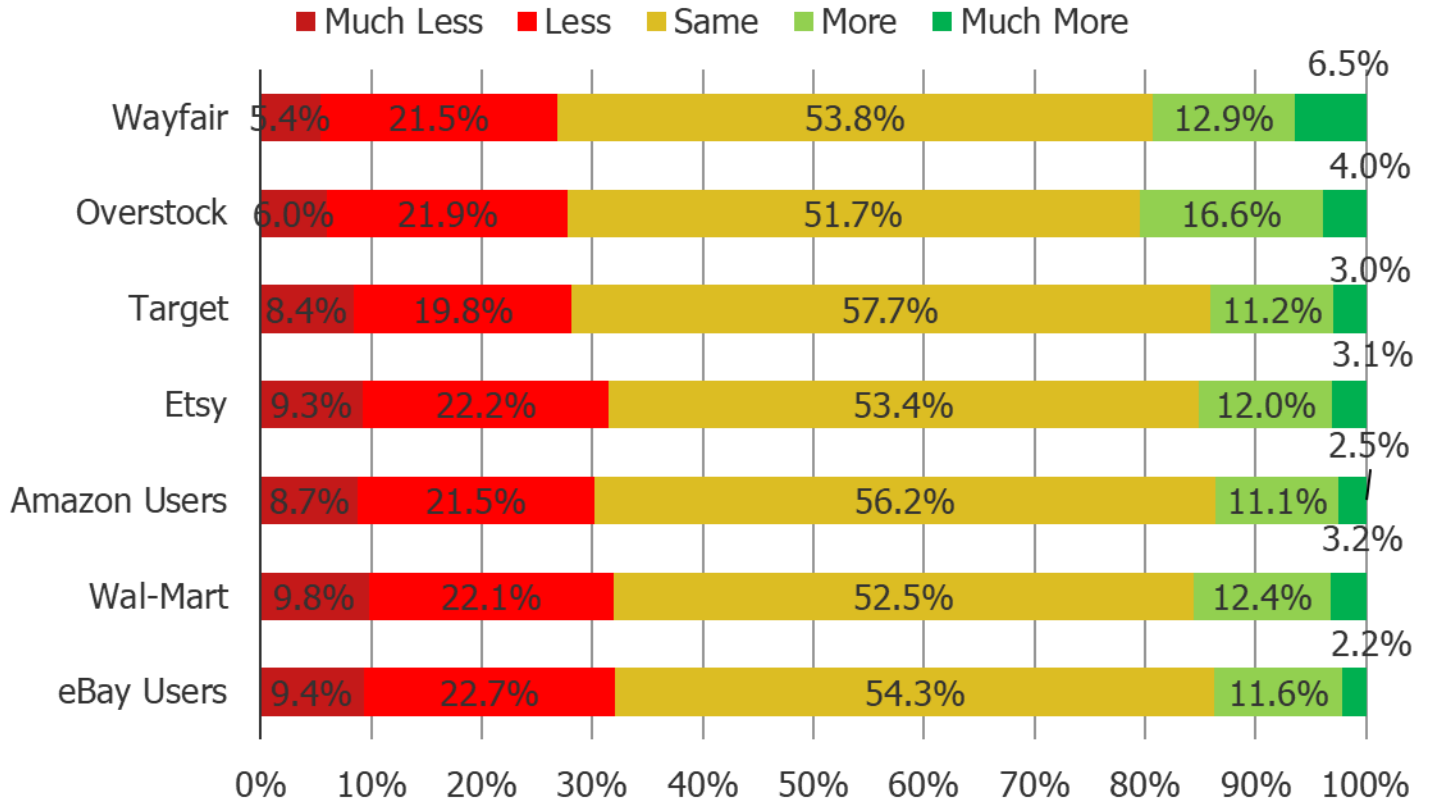


Chart above cut by income:



THINKING ABOUT YOUR HOLIDAY SHOPPING, DO YOU EXPECT TO SPEND MORE OR LESS THIS YEAR COMPARED TO LAST YEAR?

Chart from prior page cut by companies they shop regularly or occasionally...



THINKING ABOUT YOUR HOLIDAY SHOPPING, HOW MUCH OF YOUR SHOPPING GOES ONLINE VS. IN-STORES DURING THE FOLLOWING YEARS...

Posed to all respondents.

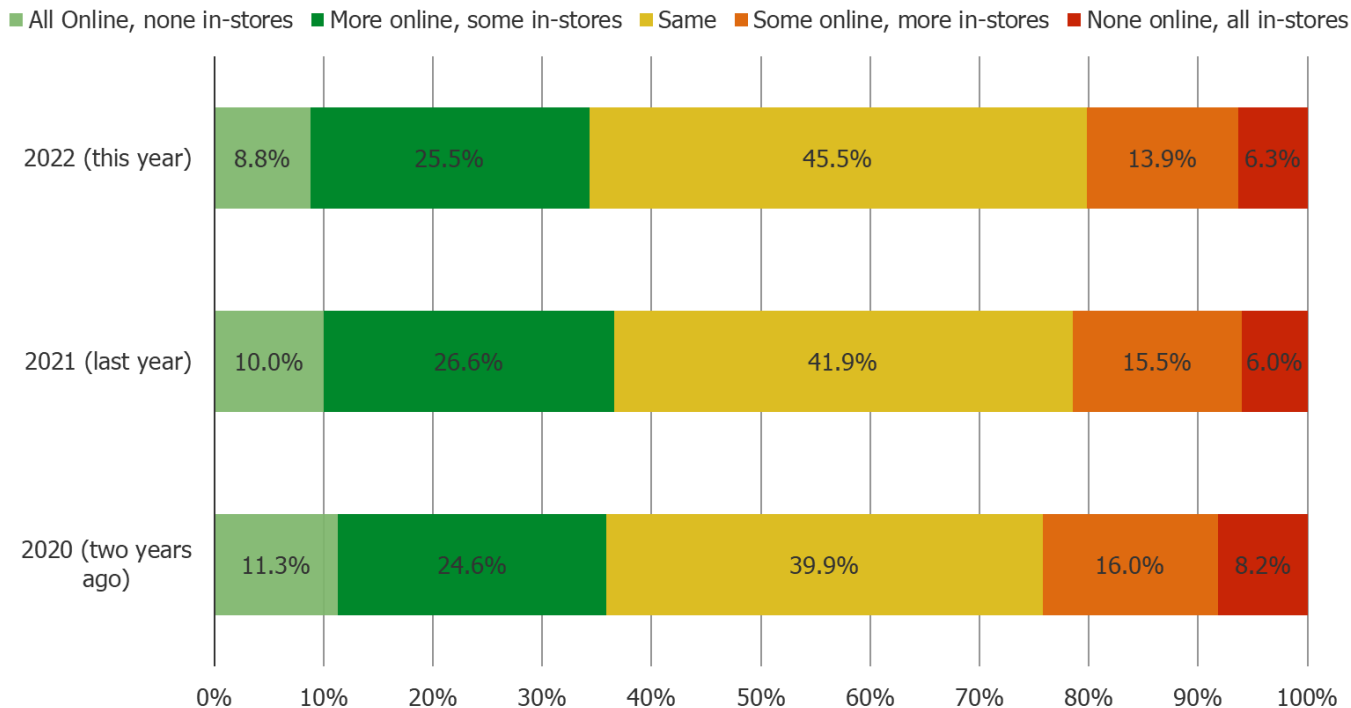
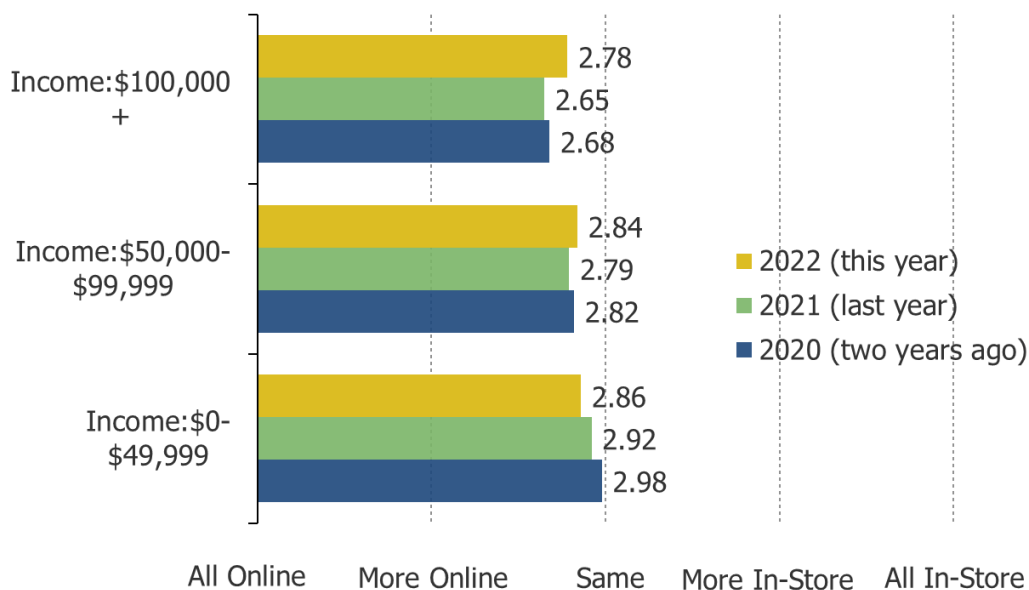
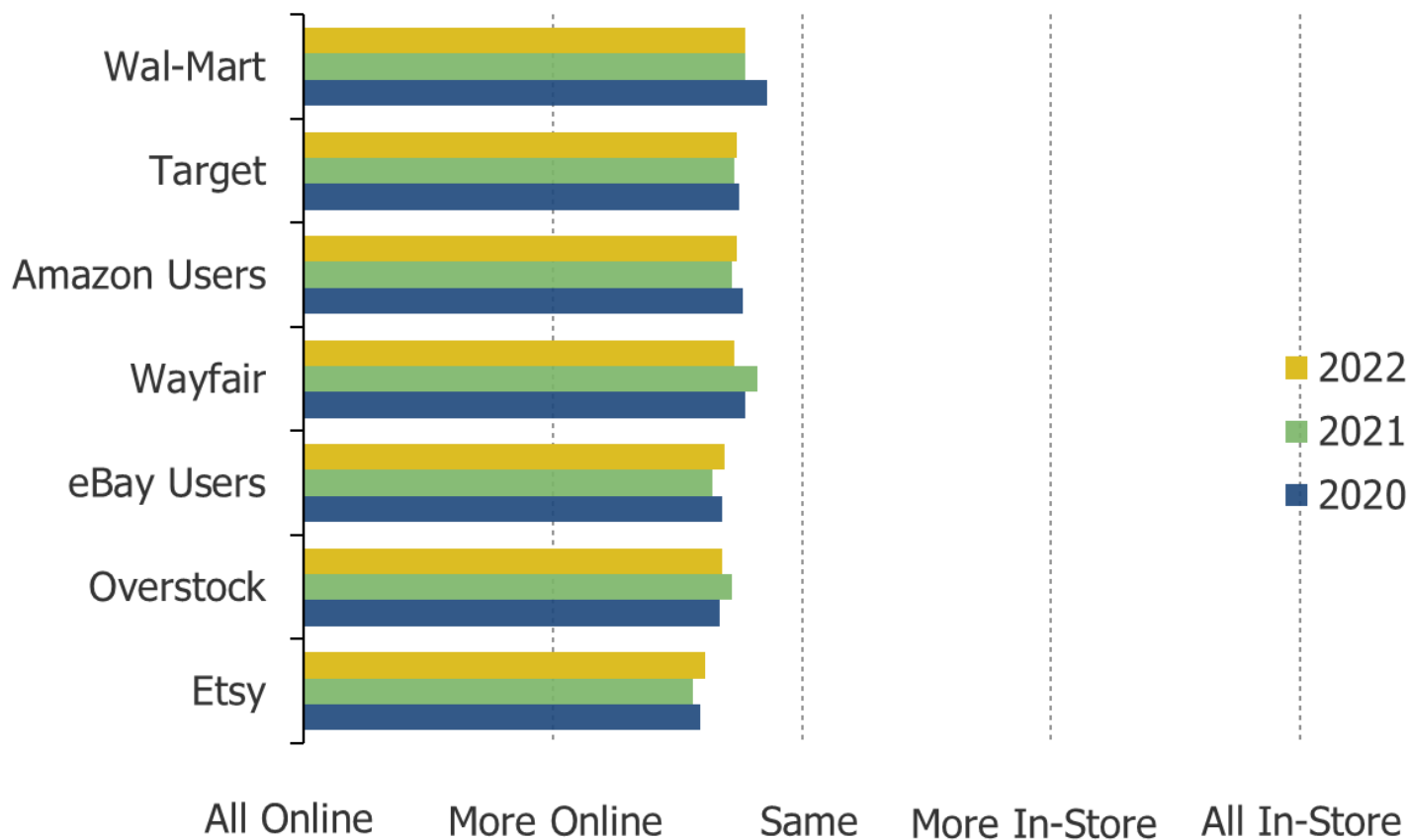


Chart above cut by income:



THINKING ABOUT YOUR HOLIDAY SHOPPING, HOW MUCH OF YOUR SHOPPING GOES ONLINE VS. IN-STORES DURING THE FOLLOWING YEARS...

Chart from prior page cut by companies they shop regularly or occasionally...



COMPARED TO LAST YEAR, DO YOU EXPECT TO SPEND MORE OR LESS ON THE FOLLOWING TYPES OF ITEMS FOR THE HOLIDAYS THIS YEAR...

Posed to all respondents.

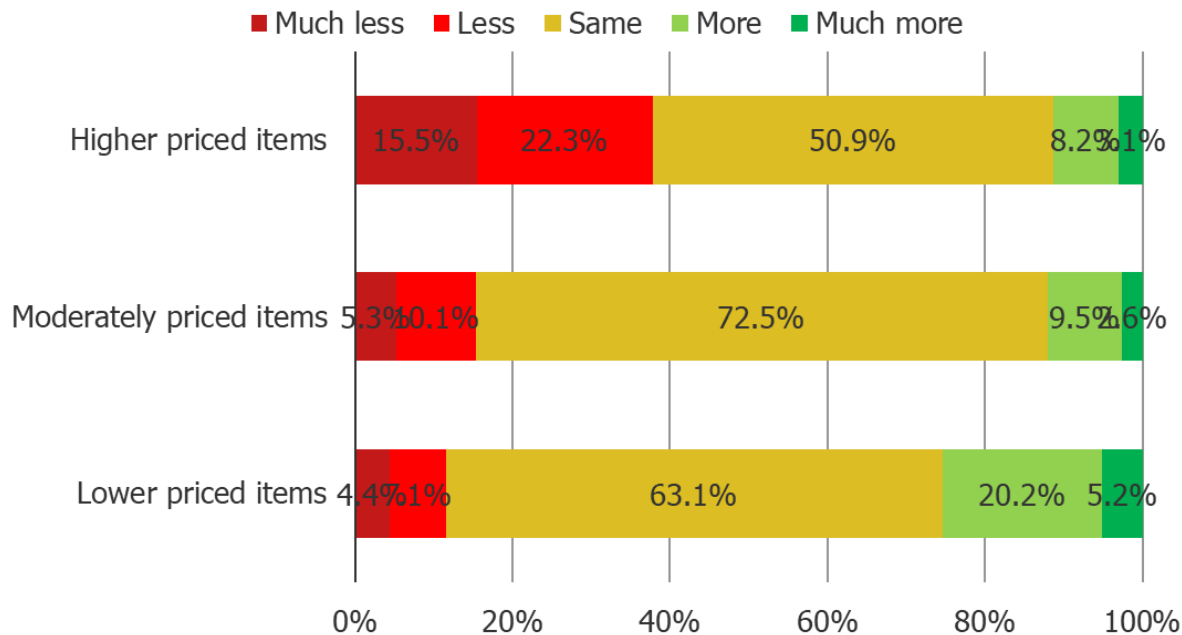
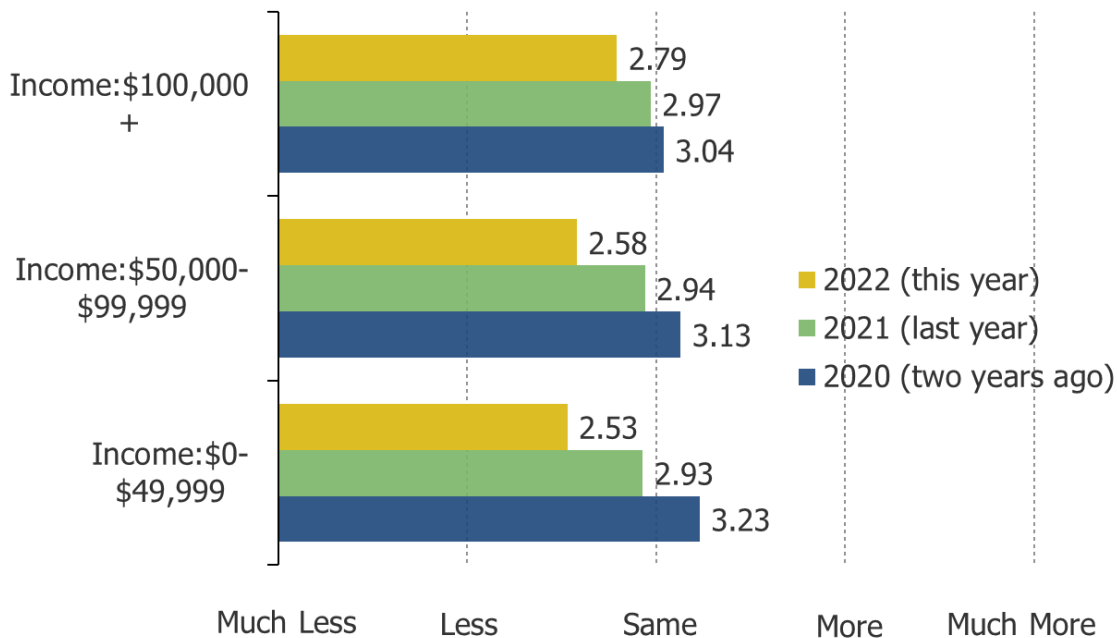
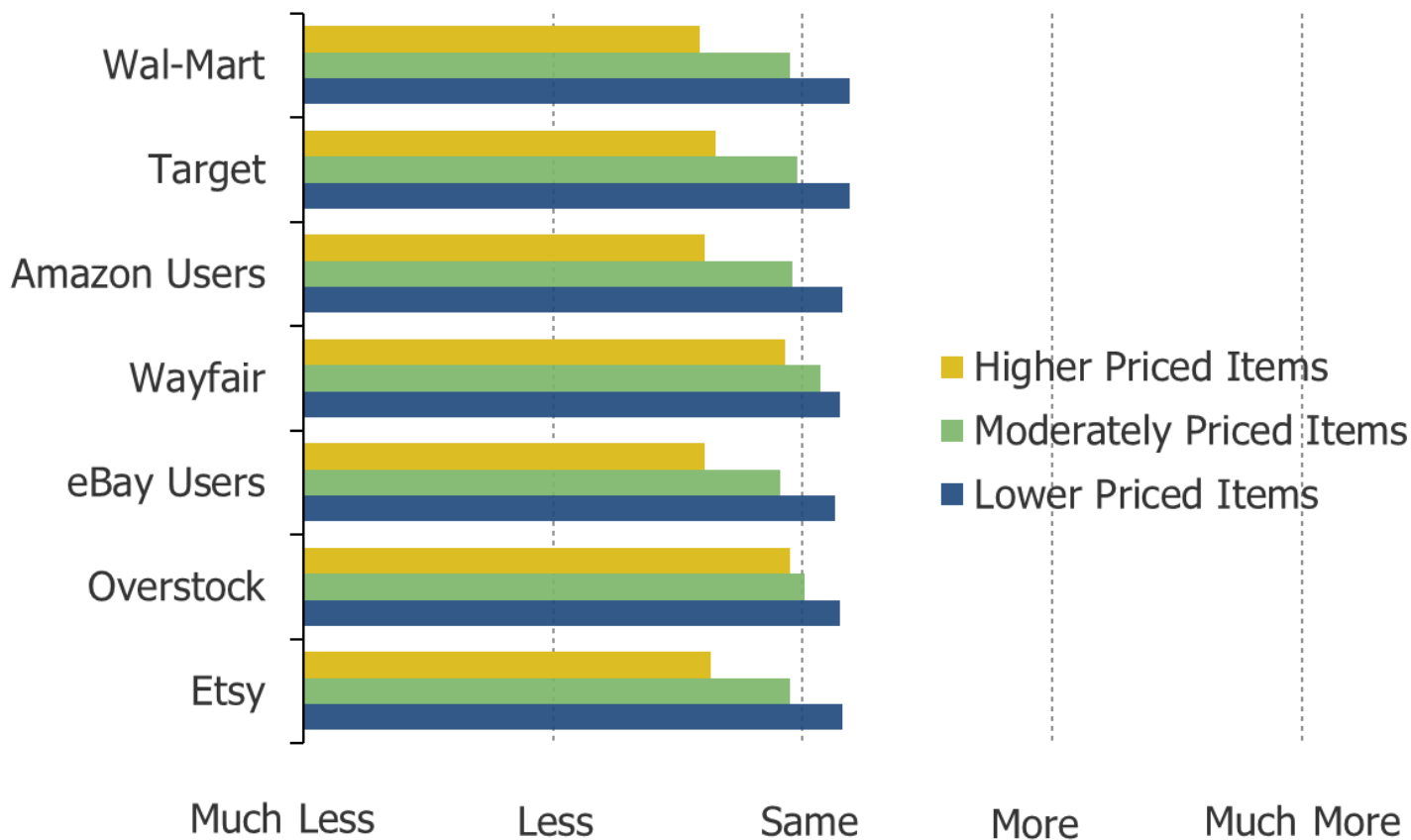


Chart above cut by income:



COMPARED TO LAST YEAR, DO YOU EXPECT TO SPEND MORE OR LESS ON THE FOLLOWING TYPES OF ITEMS FOR THE HOLIDAYS THIS YEAR...

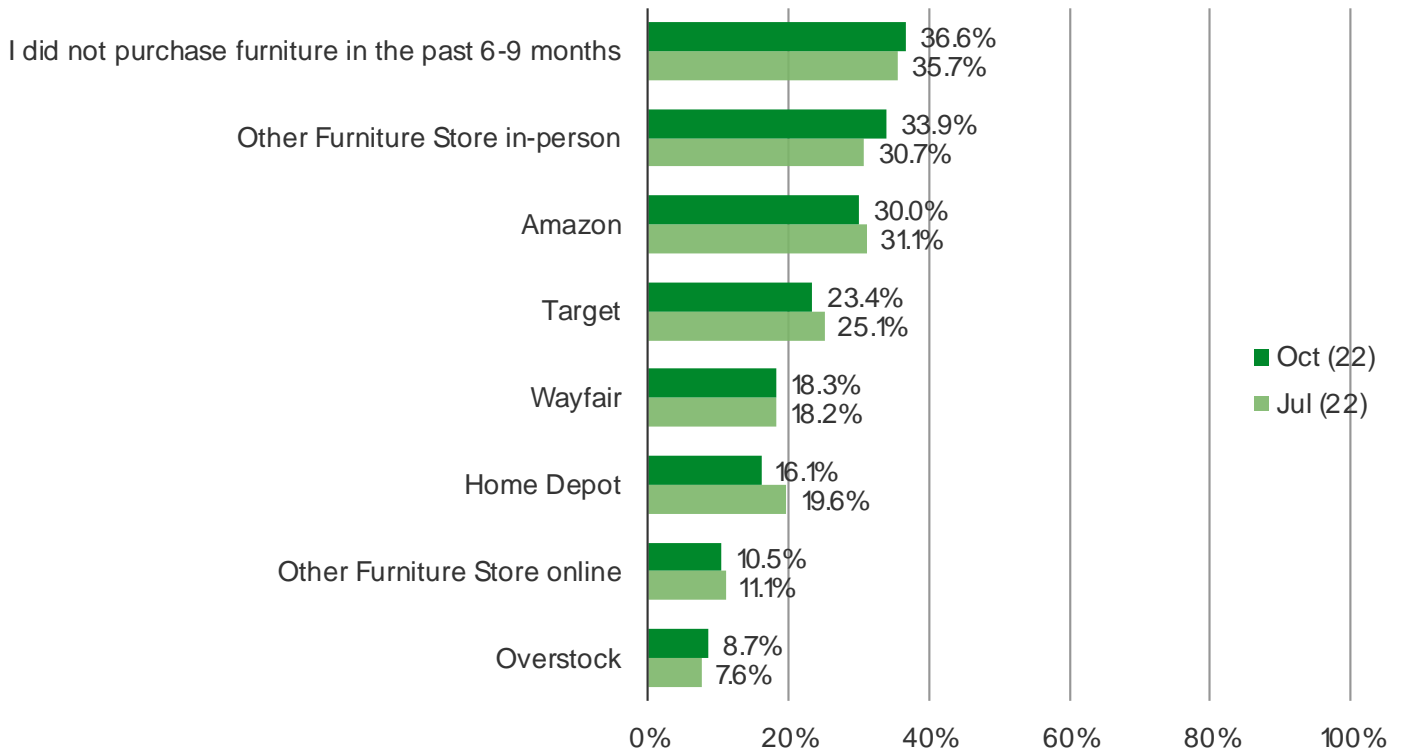
Chart from prior page cut by companies they shop regularly or occasionally...



HOME DEPOT AND TARGET <> FURNITURE

HAVE YOU EVER PURCHASED FURNITURE FROM ANY OF THE FOLLOWING?

Posed to all respondents.



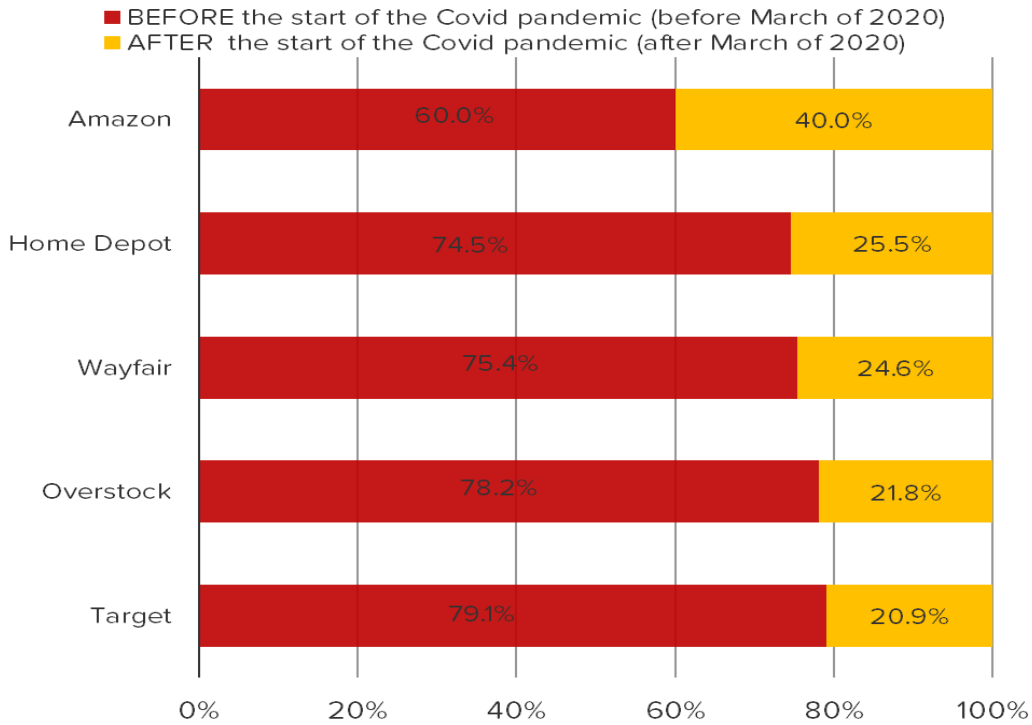
Cross-Tab Analysis of the Data From the Above Chart

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	

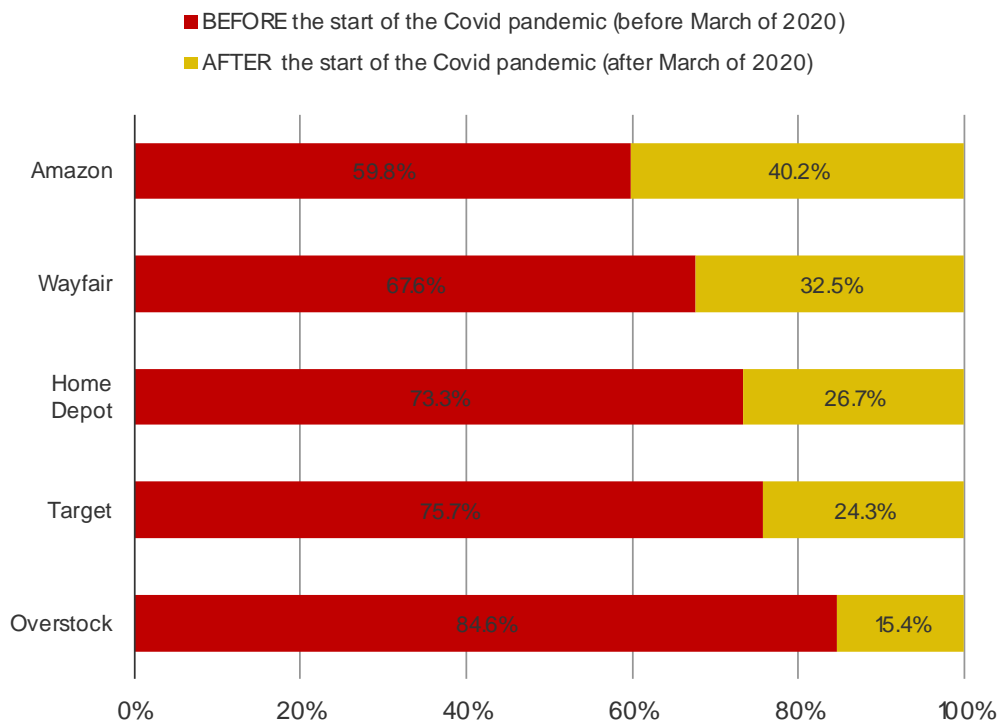
WHEN DID YOU BUY FURNITURE FROM THE FOLLOWING FOR THE FIRST TIME?

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

October 2022



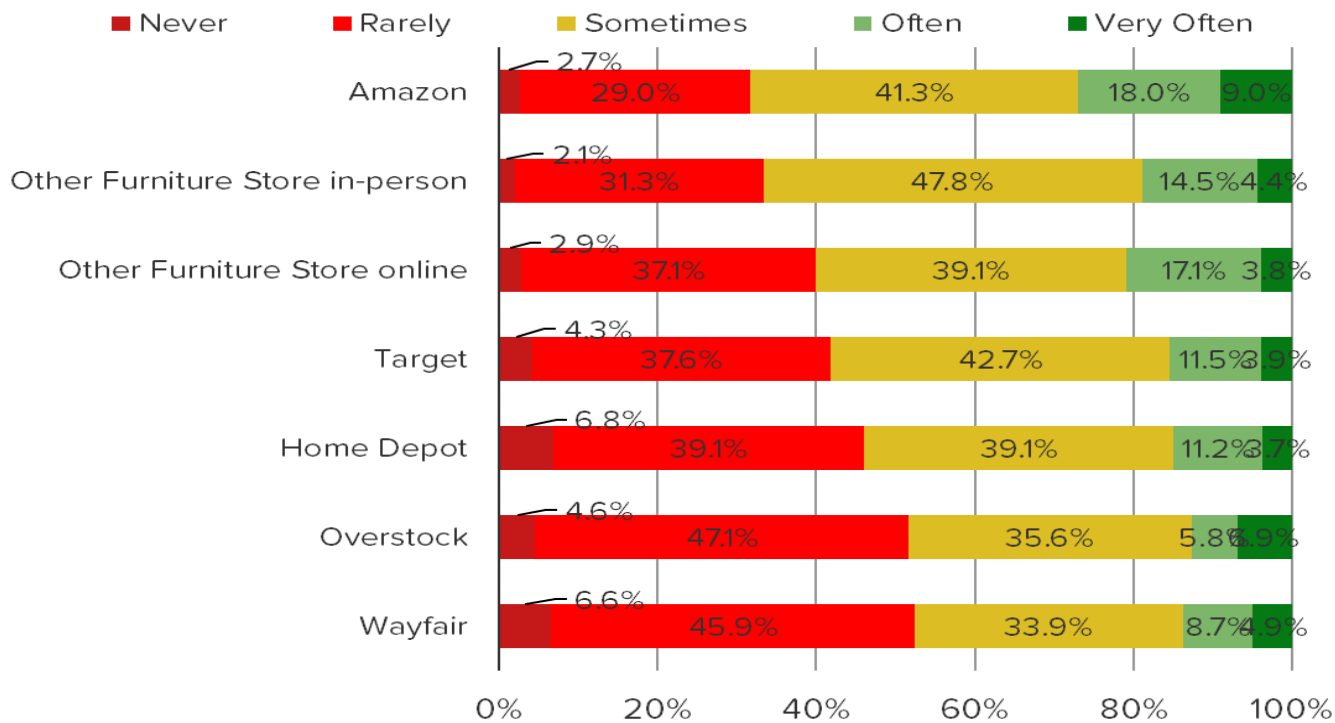
July 2022



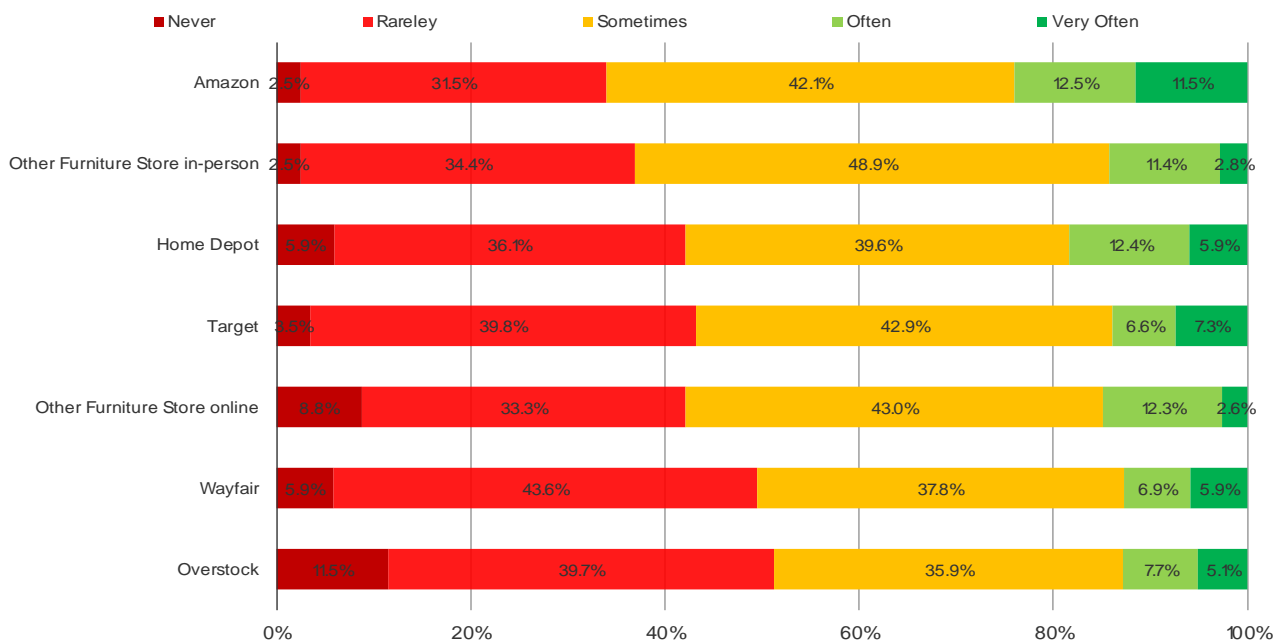
HOW OFTEN DO YOU EXPECT TO BUY FURNITURE FROM THE FOLLOWING GOING FORWARD?

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

October 2022

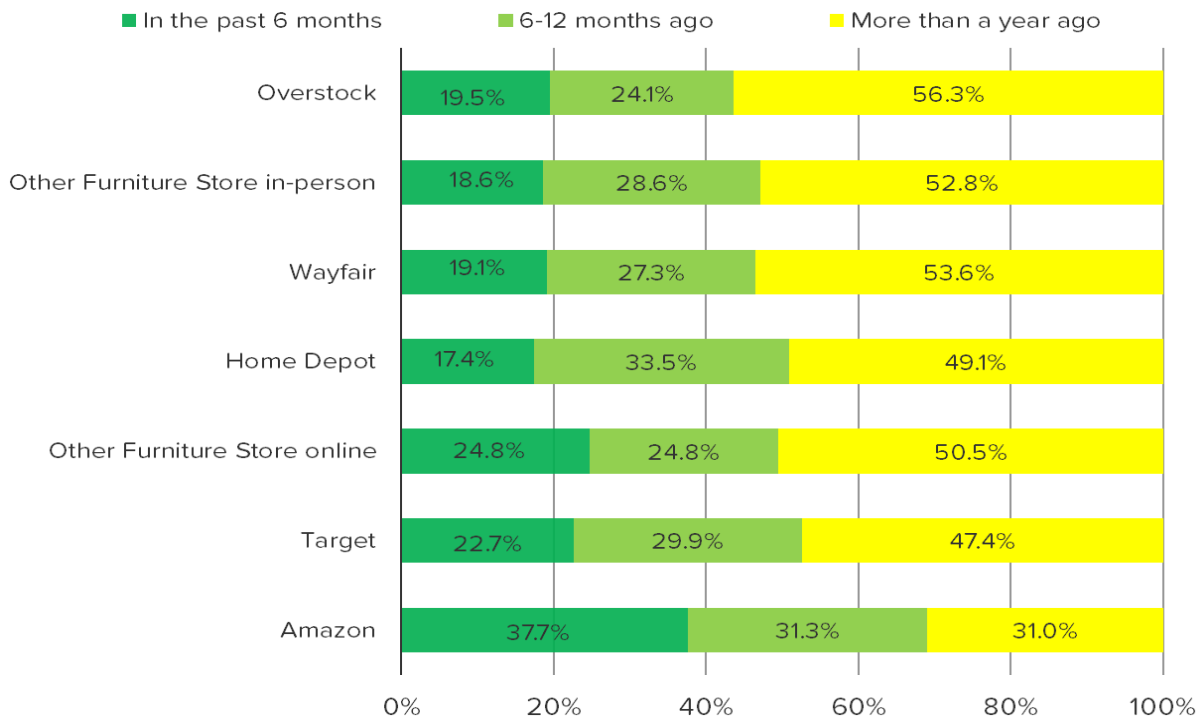


July 2022

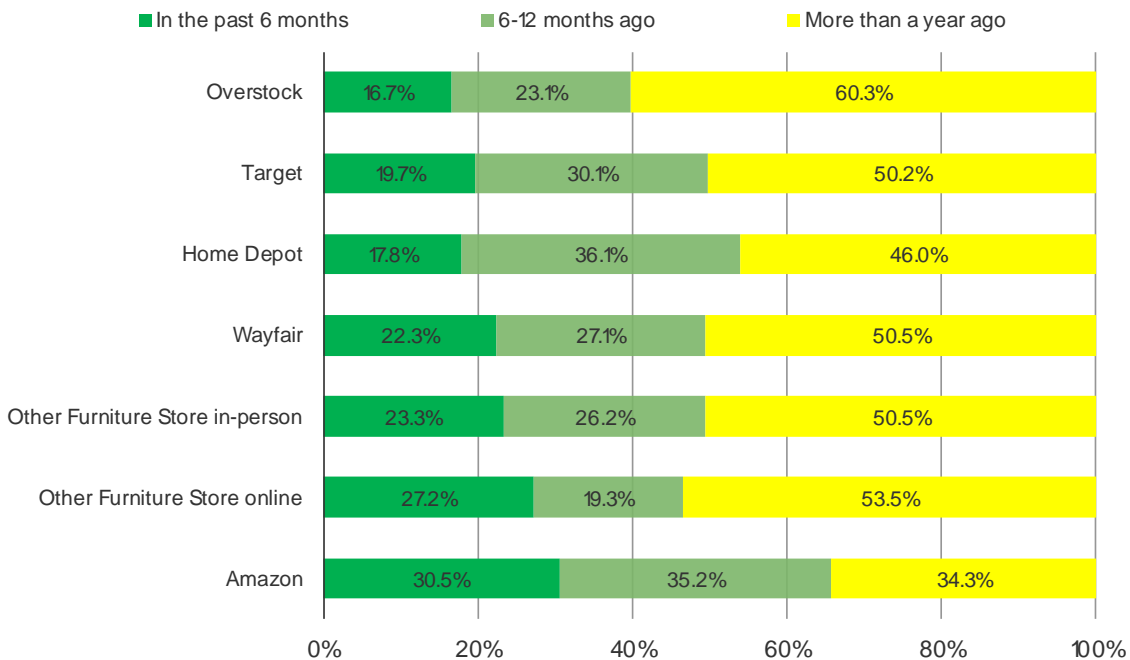


WHEN DID YOU MOST RECENTLY BUY FURNITURE FROM THE FOLLOWING?

Posed to respondents who have purchased furniture from each of the following.
October 2022



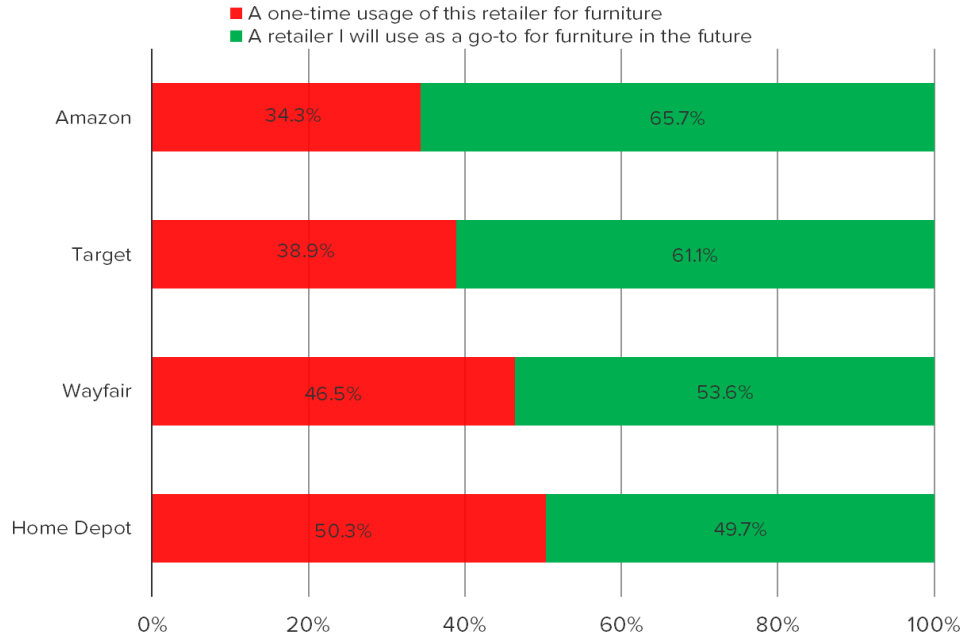
July 2022



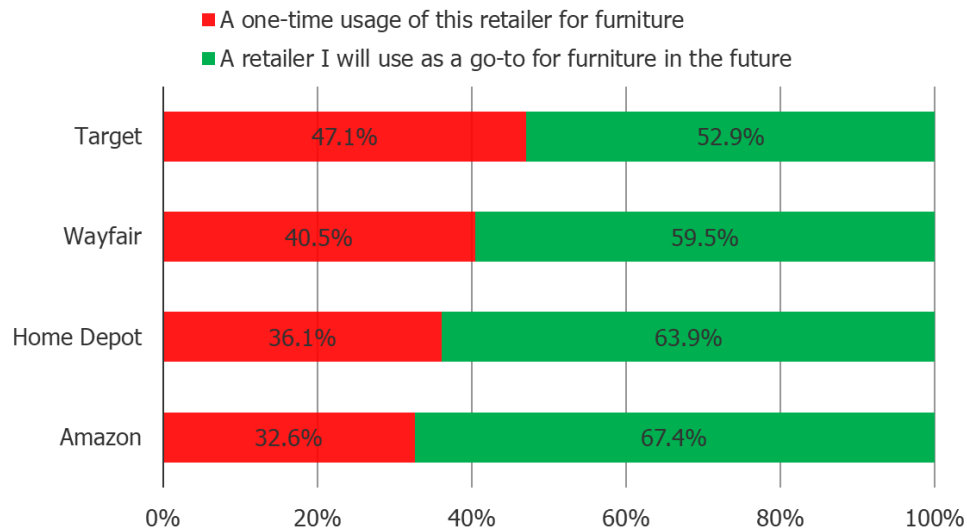
THINKING ABOUT YOUR USAGE OF THE FOLLOWING FOR A FURNITURE PURCHASE IN THE PAST 6 MONTHS, DO YOU VIEW THIS AS...

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

October 2022



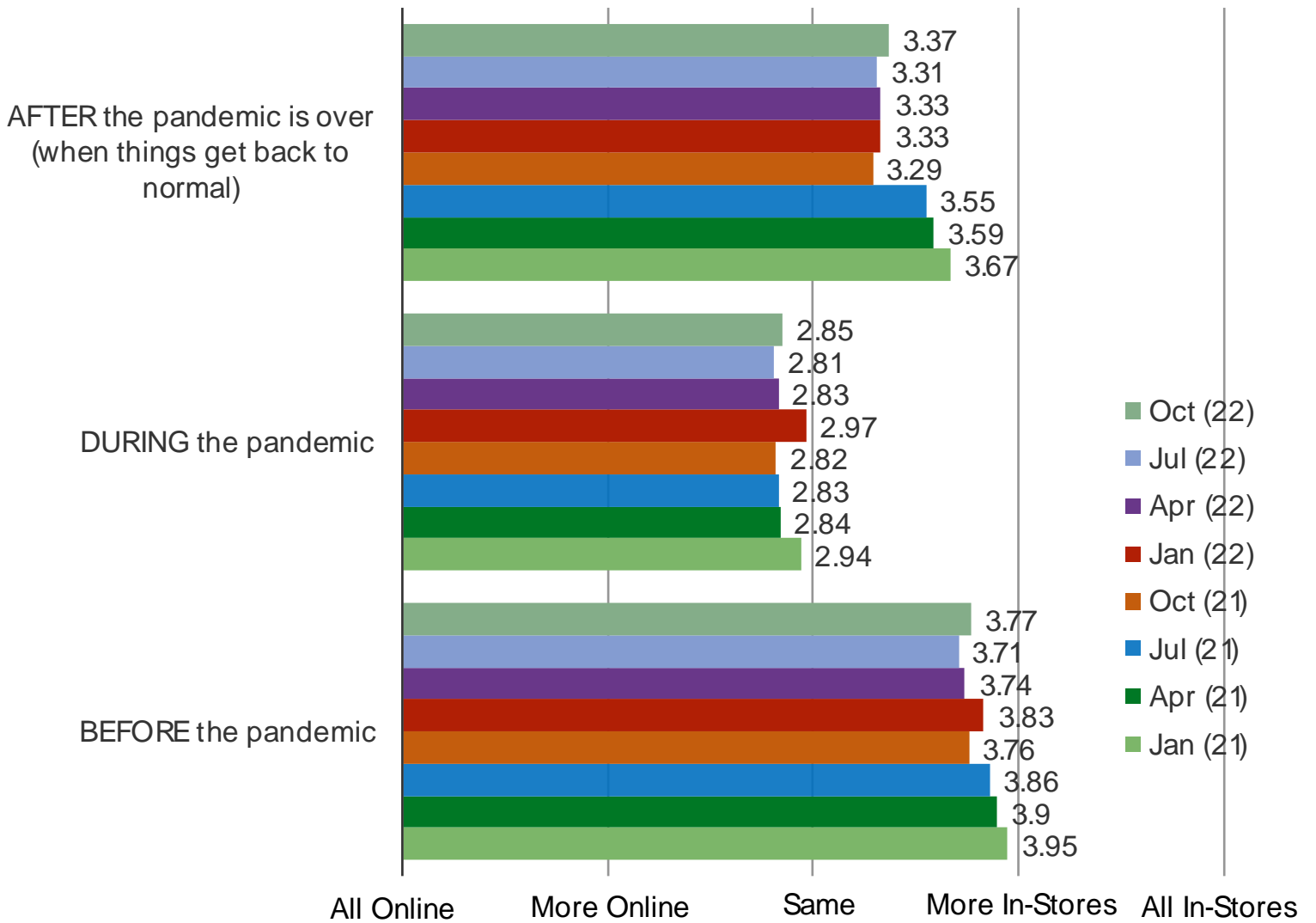
July 2022



FURNITURE PURCHASE TRENDS PRE / DURING / POST PANDEMIC

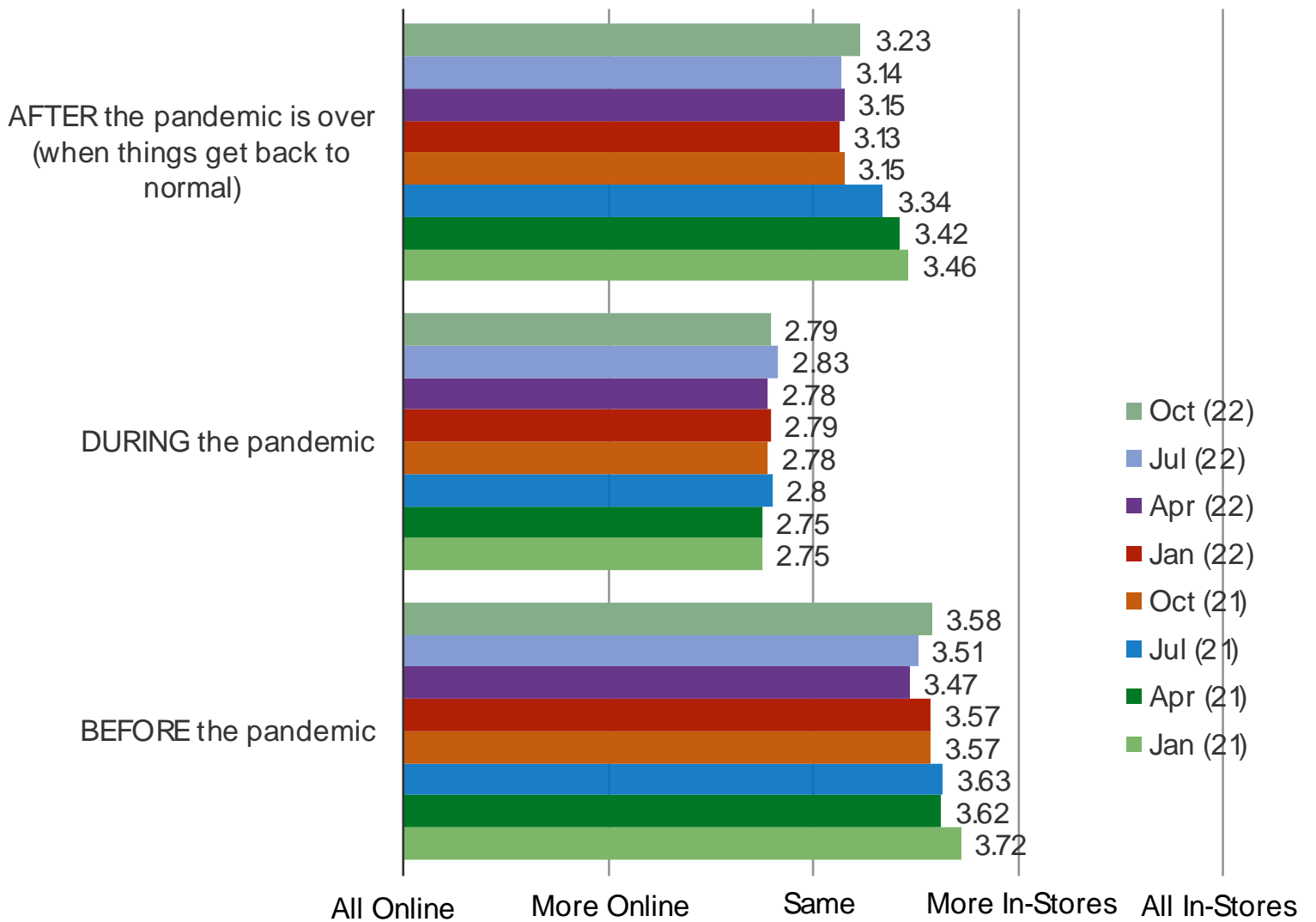
HOW MUCH OF YOUR FURNITURE PURCHASES DID YOU/WILL YOU BUY ONLINE VS IN-STORES...

Posed to all respondents.



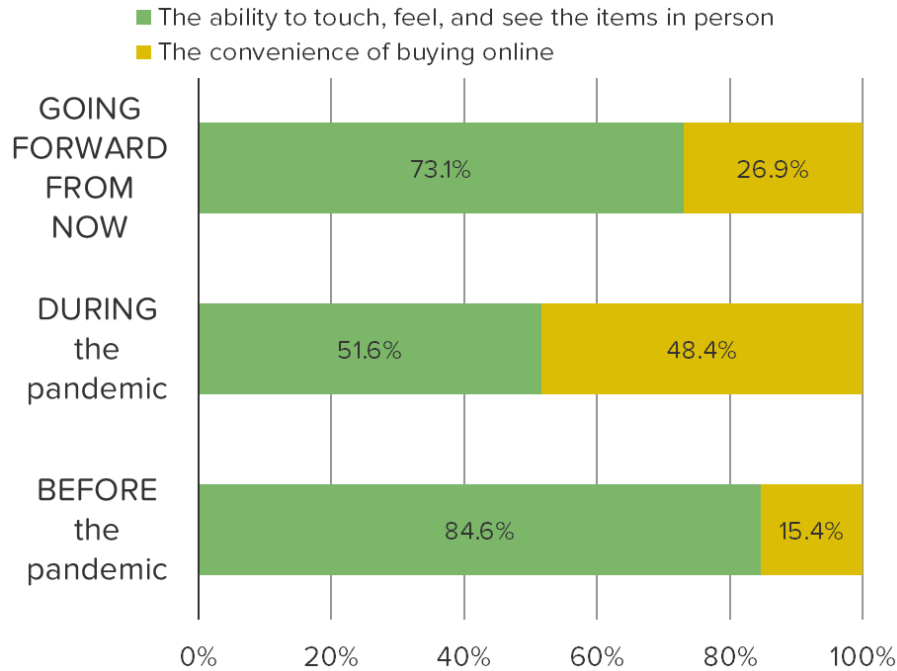
HOW MUCH OF YOUR HOME FURNISHINGS AND OTHER ITEMS FOR THE HOME PURCHASES DID YOU/WILL YOU BUY ONLINE VS IN-STORES...

Posed to all respondents.



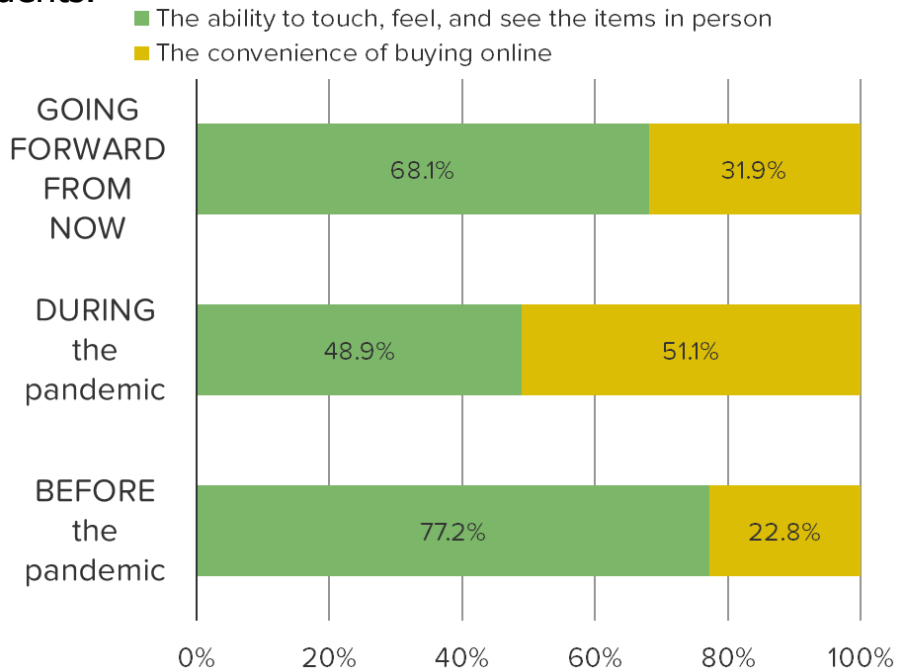
WHEN IT COMES TO BUYING FURNITURE, WHICH IS MORE IMPORTANT?

Posed to all respondents.



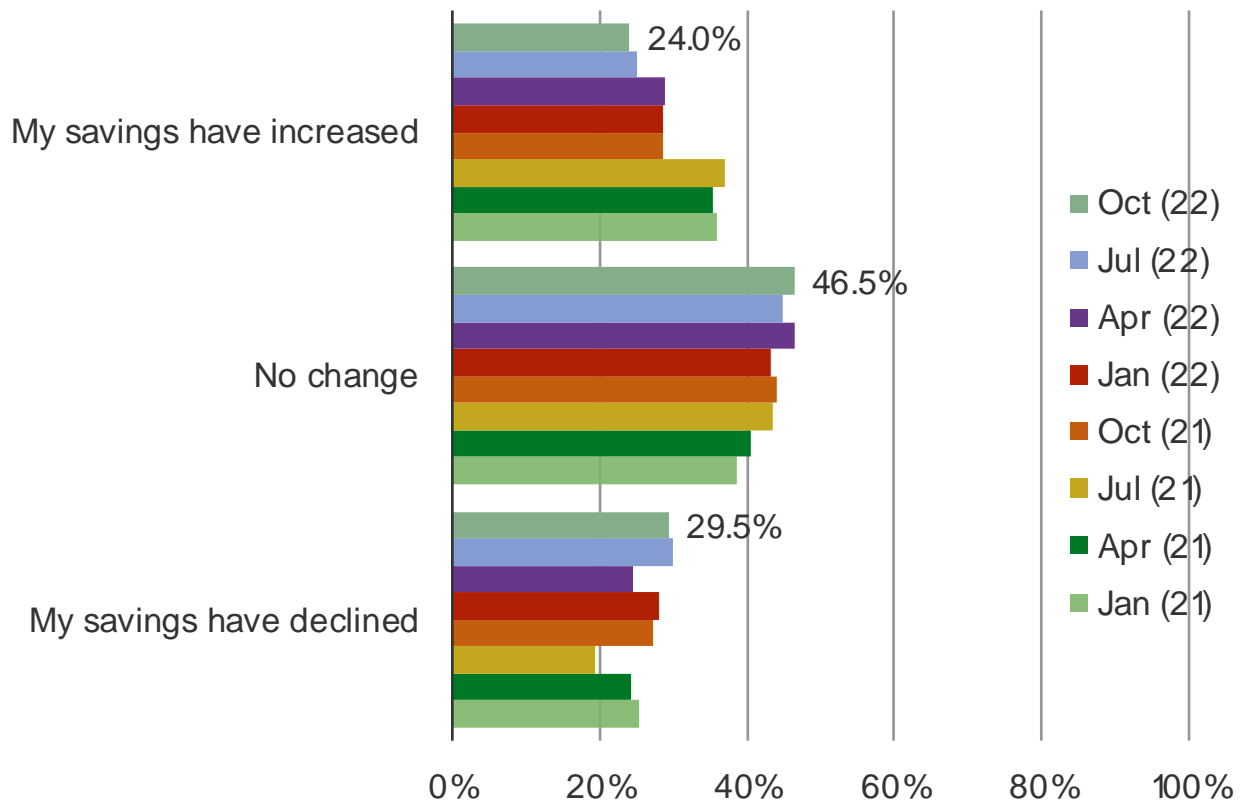
WHEN IT COMES TO BUYING HOME FURNISHINGS AND OTHER ITEMS FOR THE HOME, WHICH IS MORE IMPORTANT?

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?

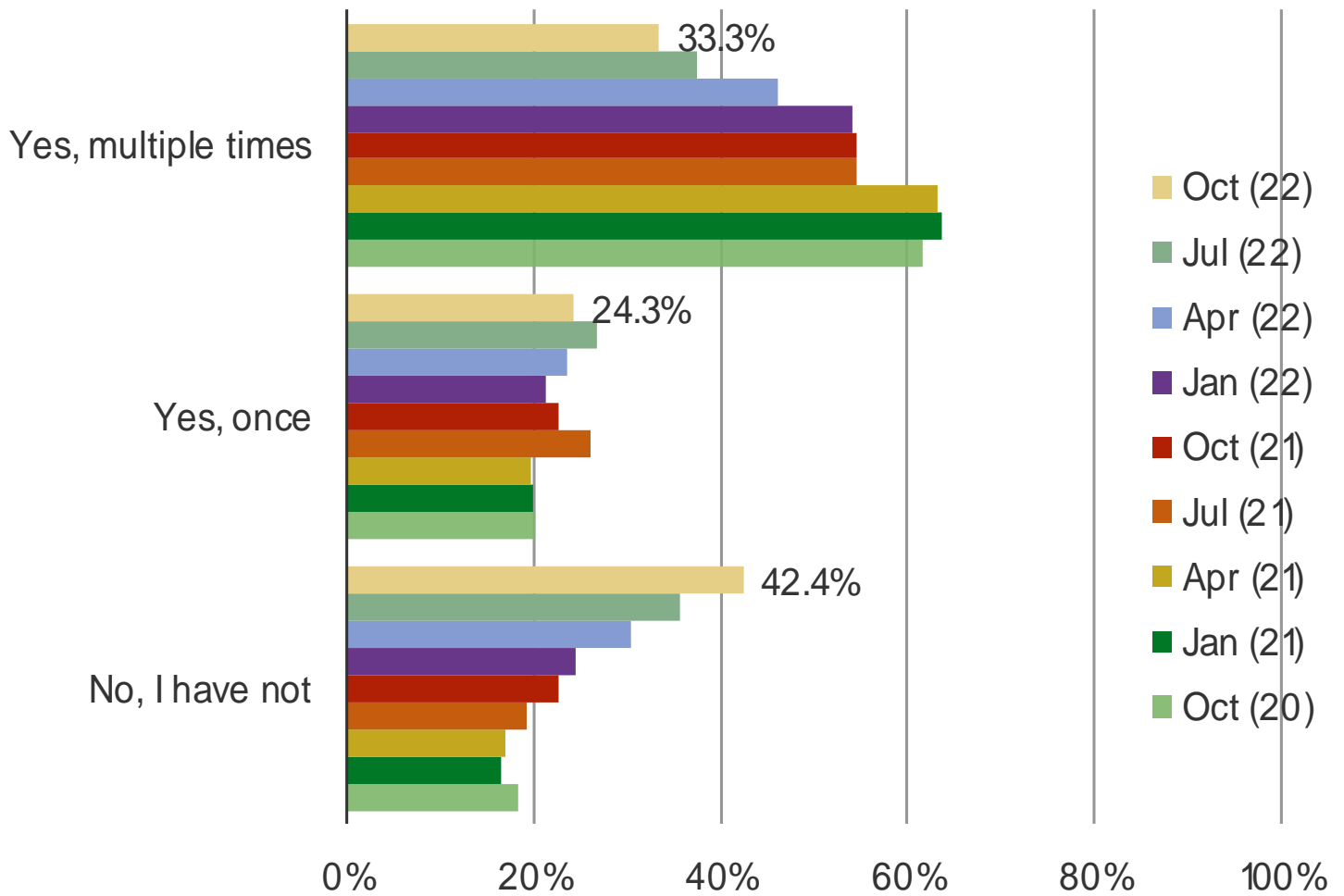
Posed to all respondents.



FACE MASKS

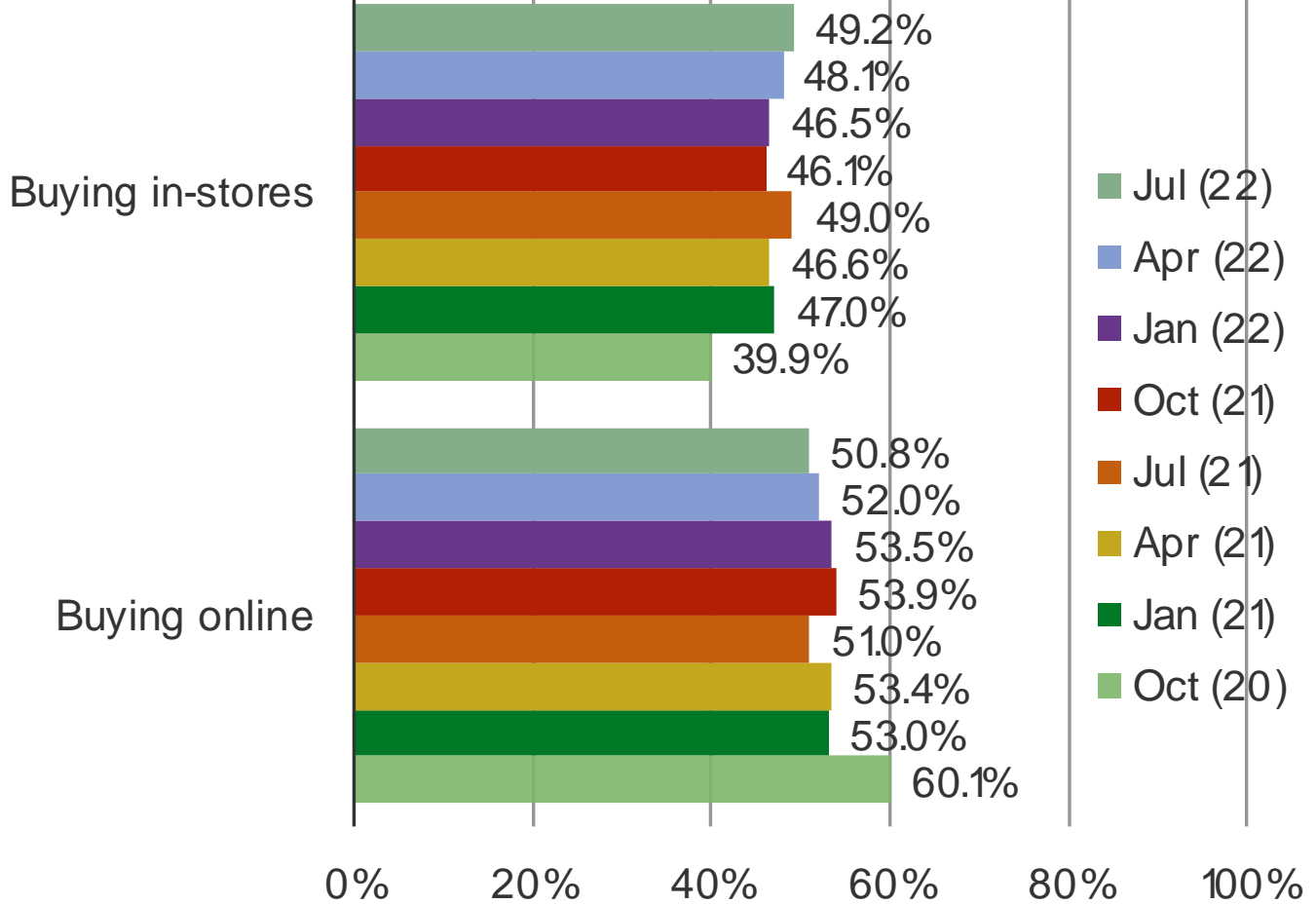
HAVE YOU PURCHASED MASK(S) THIS YEAR?

Posed to all respondents



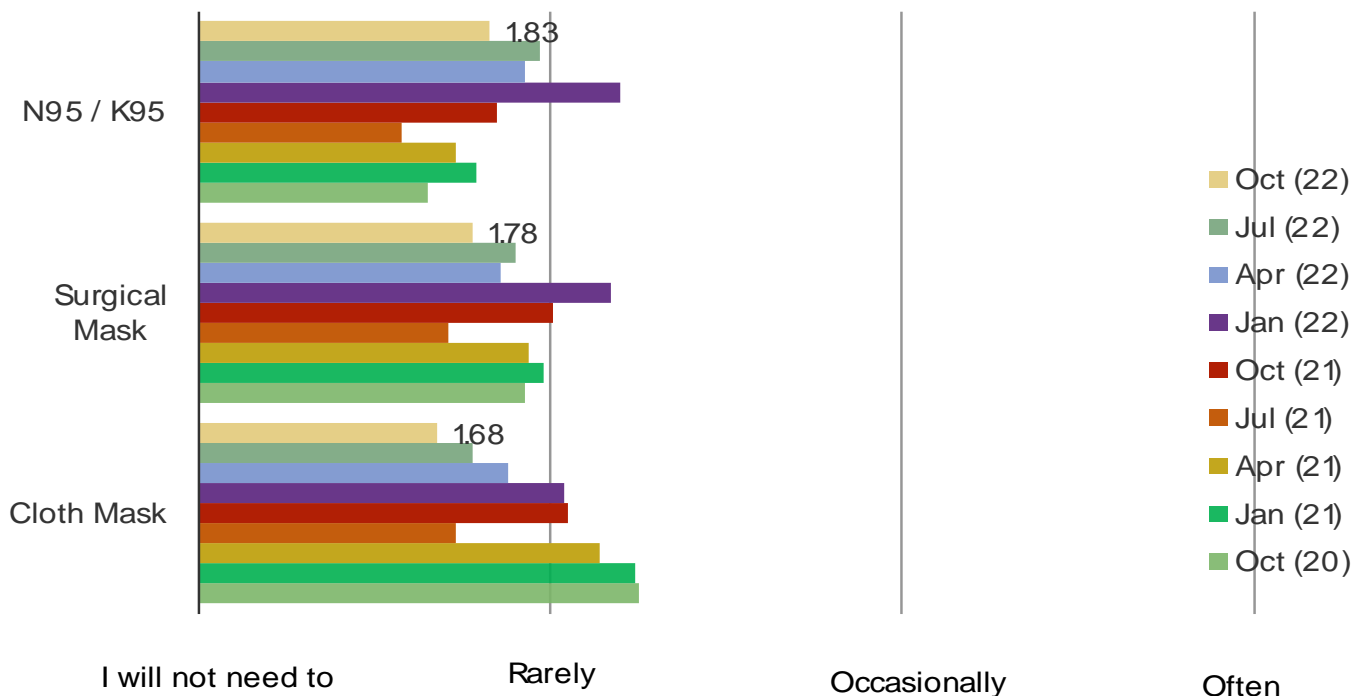
WHICH WOULD YOU PREFER FOR PURCHASING MASKS?

Posed to all respondents

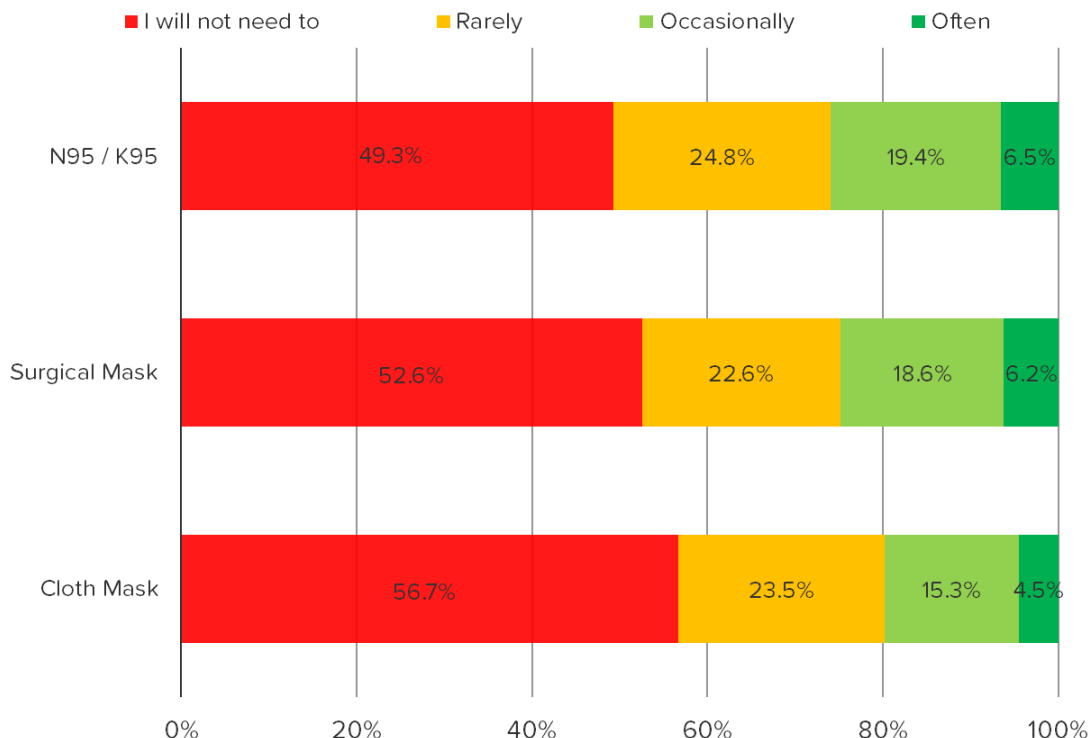


GOING FORWARD, HOW OFTEN DO YOU EXPECT TO NEED TO PURCHASE NEW MASKS OR FACE COVERINGS?

Posed to all respondents

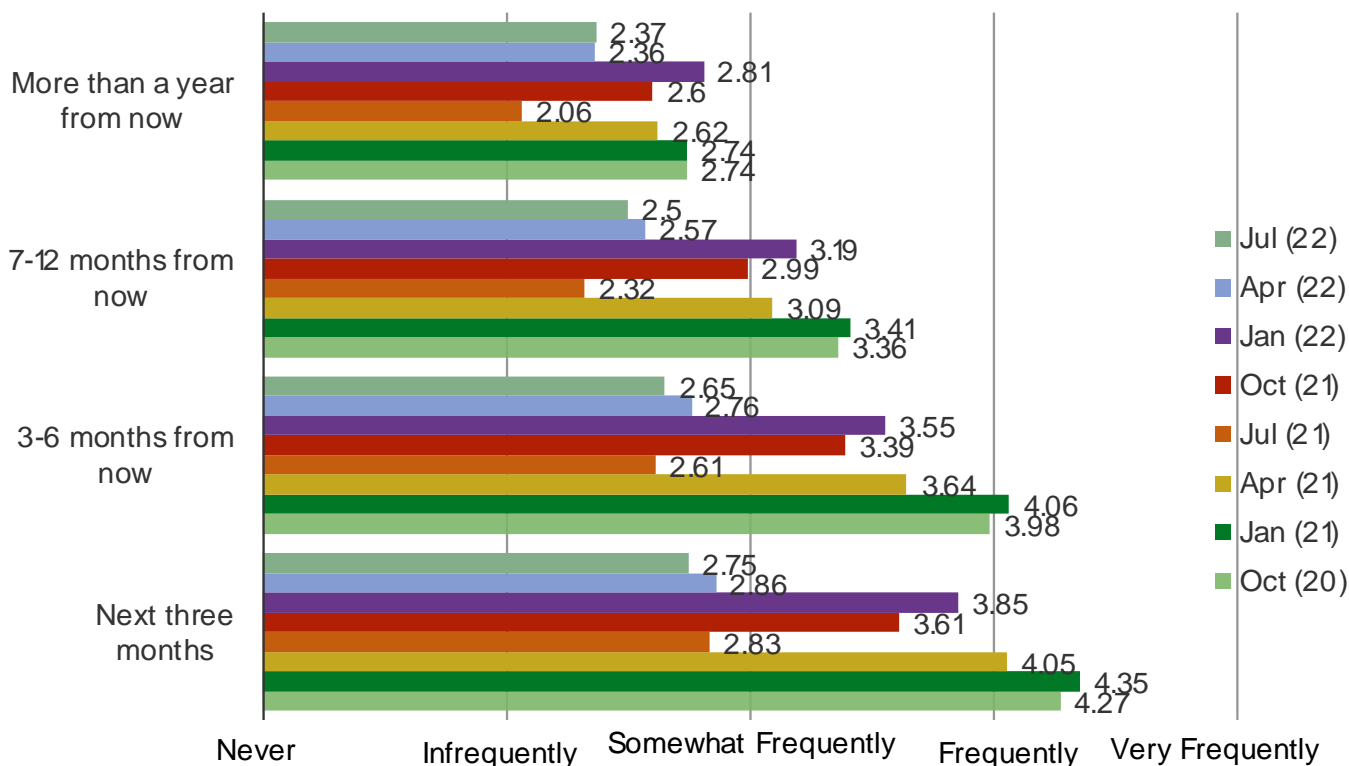


October 2022 data broken out:



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

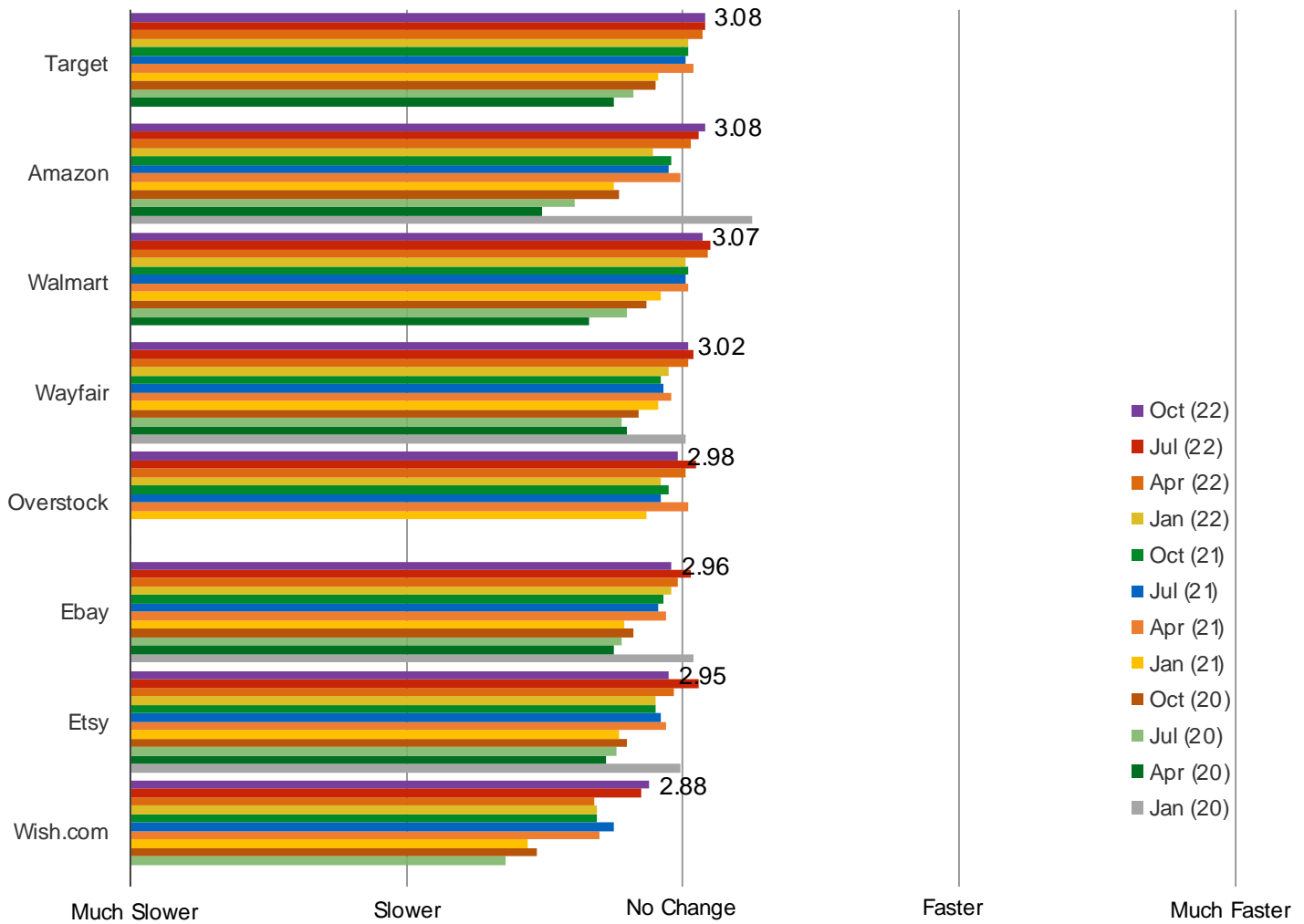
Posed to all respondents



SHIPPING DELAYS

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

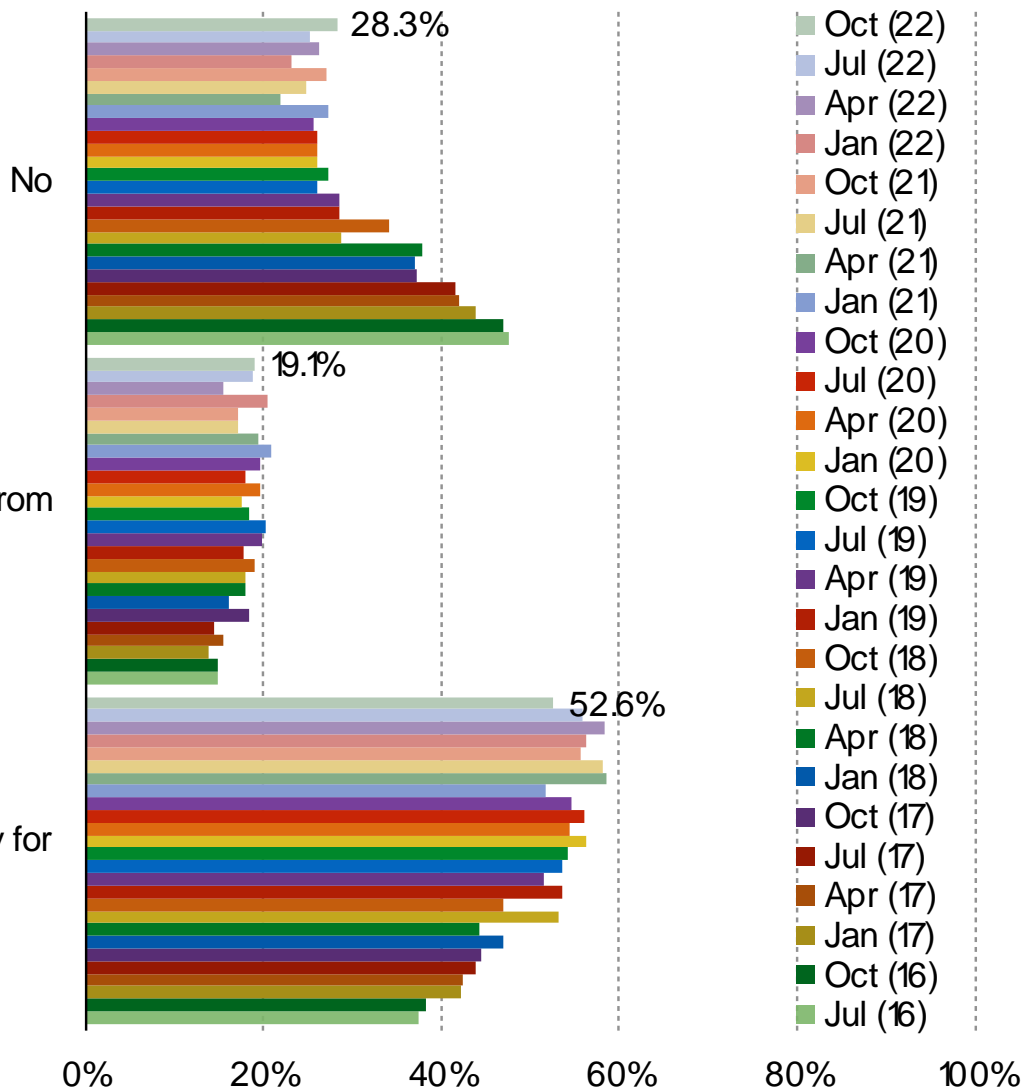
Posed to users of each site/app.



AMZN PRIME TRENDS

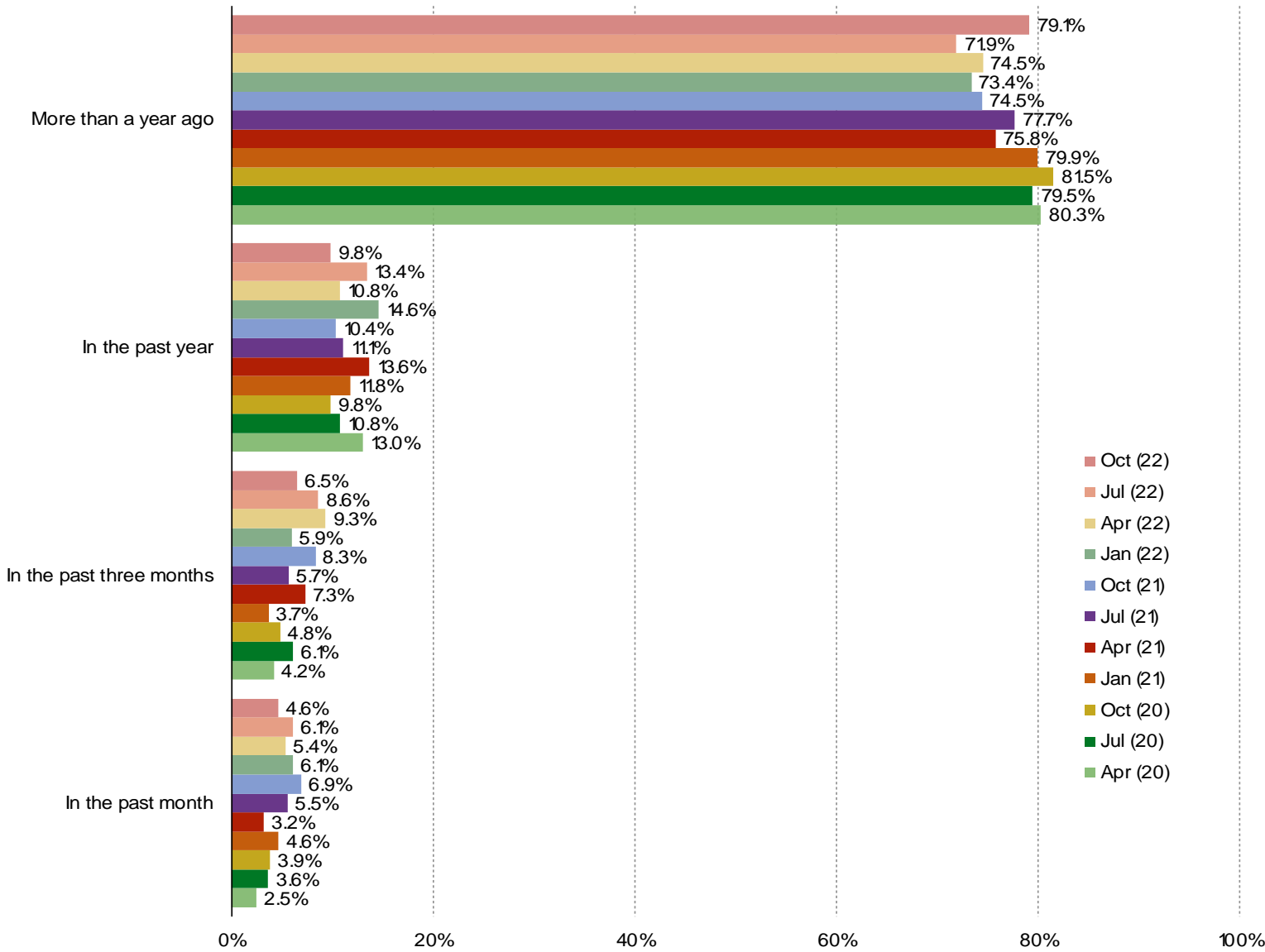
ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

Posed to Amazon users



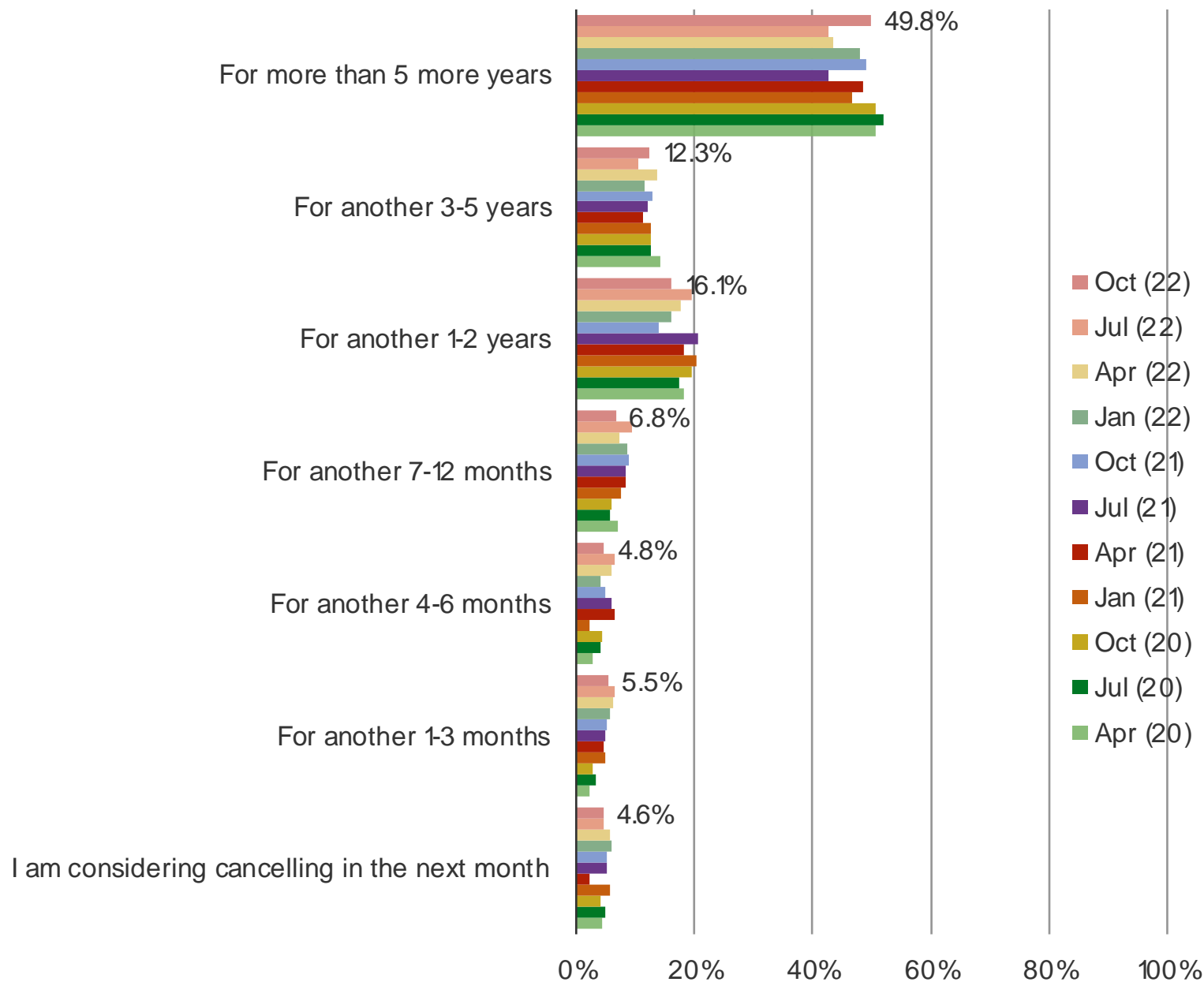
WHEN DID YOU START YOUR CURRENT AMAZON PRIME MEMBERSHIP?

Posed to Amazon users who are Prime members.



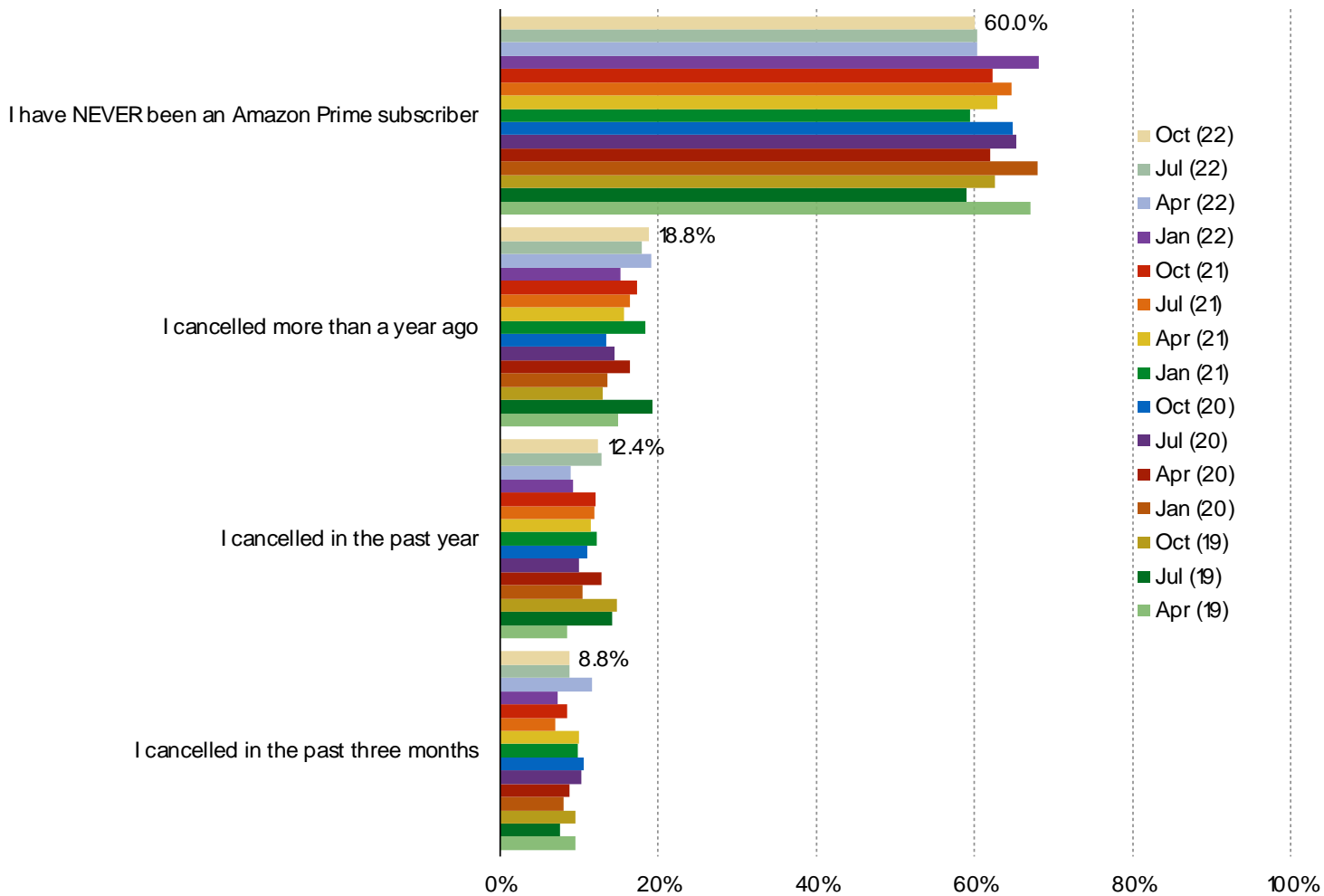
FOR HOW MUCH LONGER DO YOU INTEND TO BE AN AMAZON PRIME MEMBER?

Posed to Amazon users who are Prime members.



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

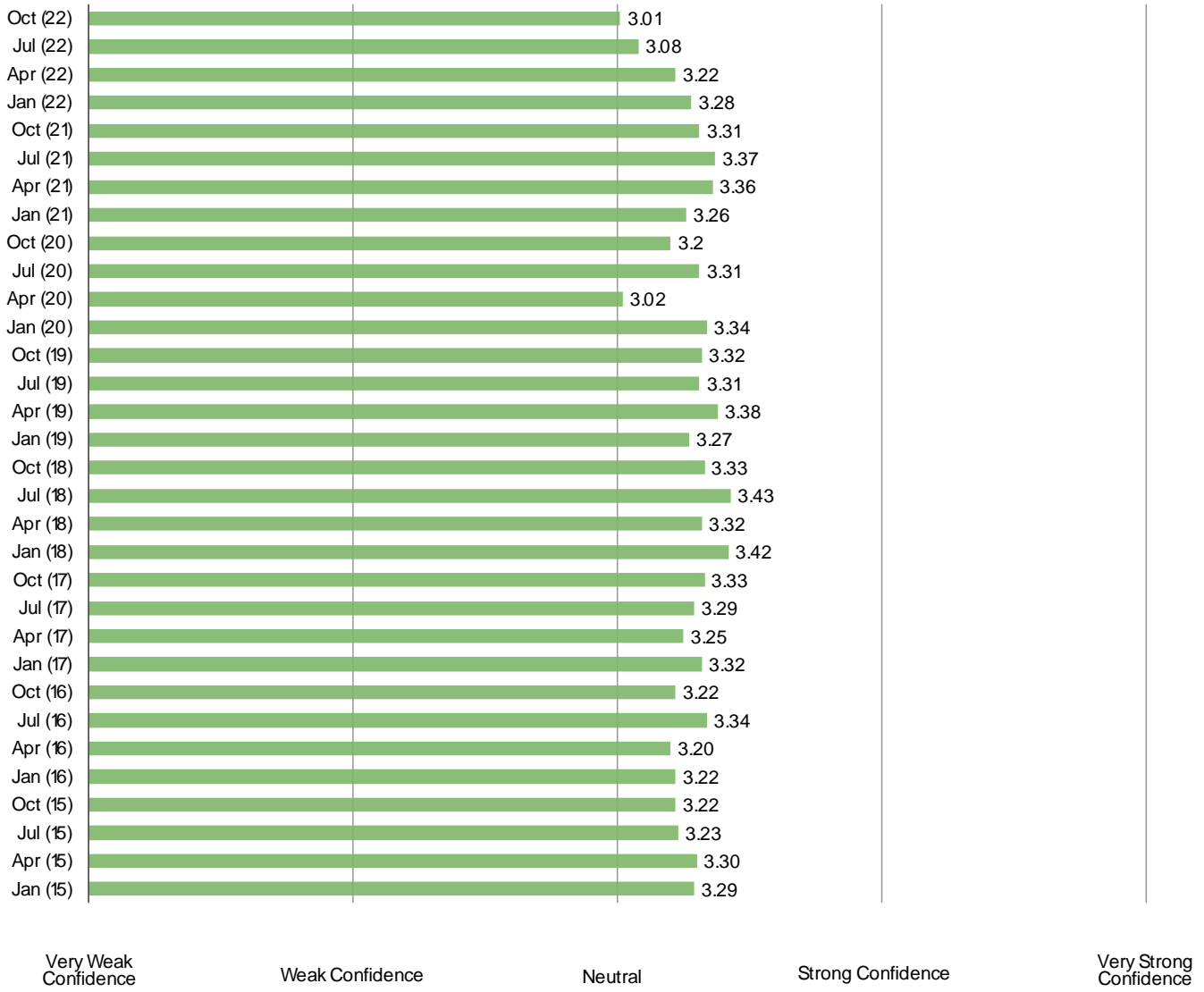
Posed to Amazon users **who are not prime subscribers**



OVERALL SHOPPING TRENDS

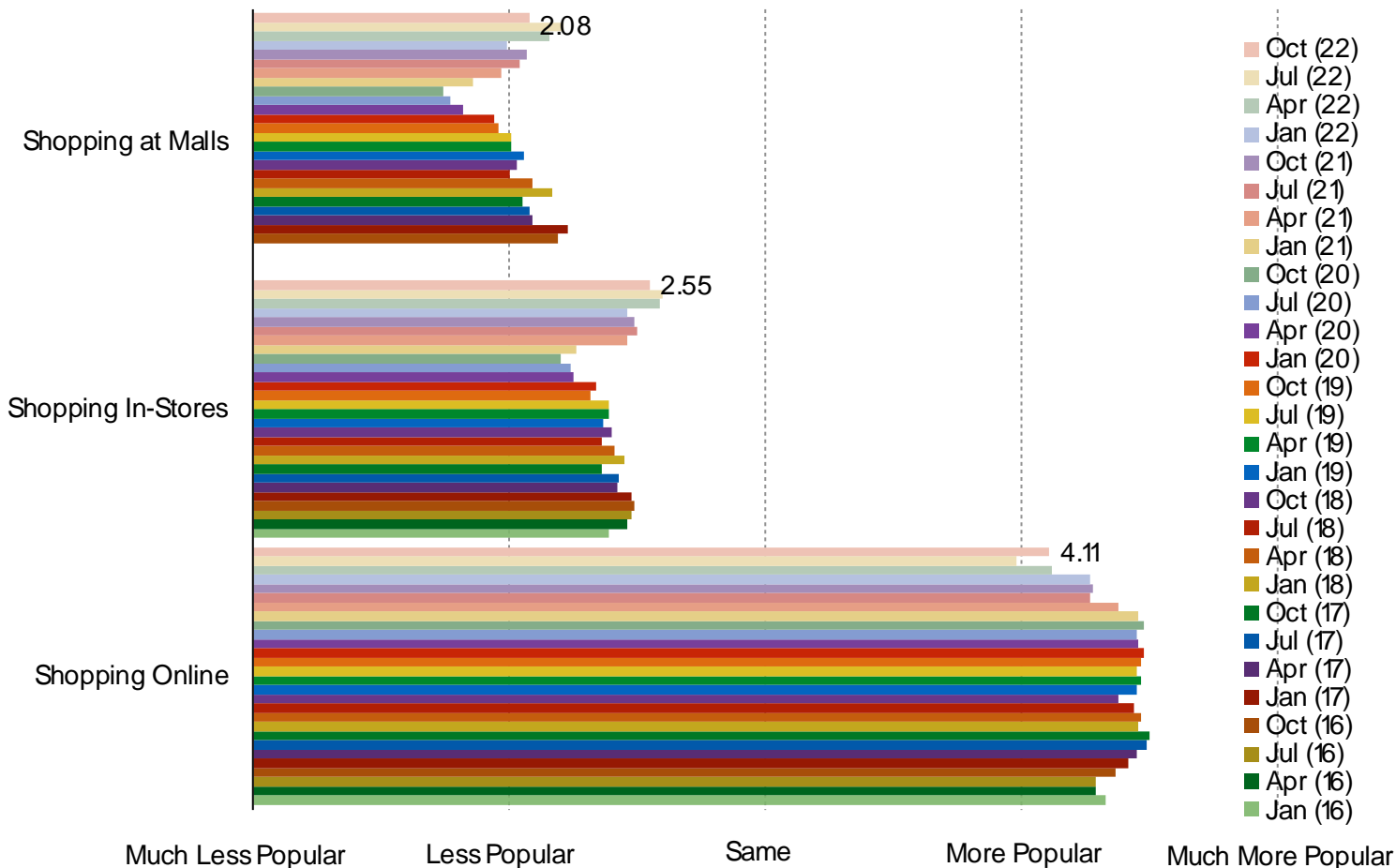
HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



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

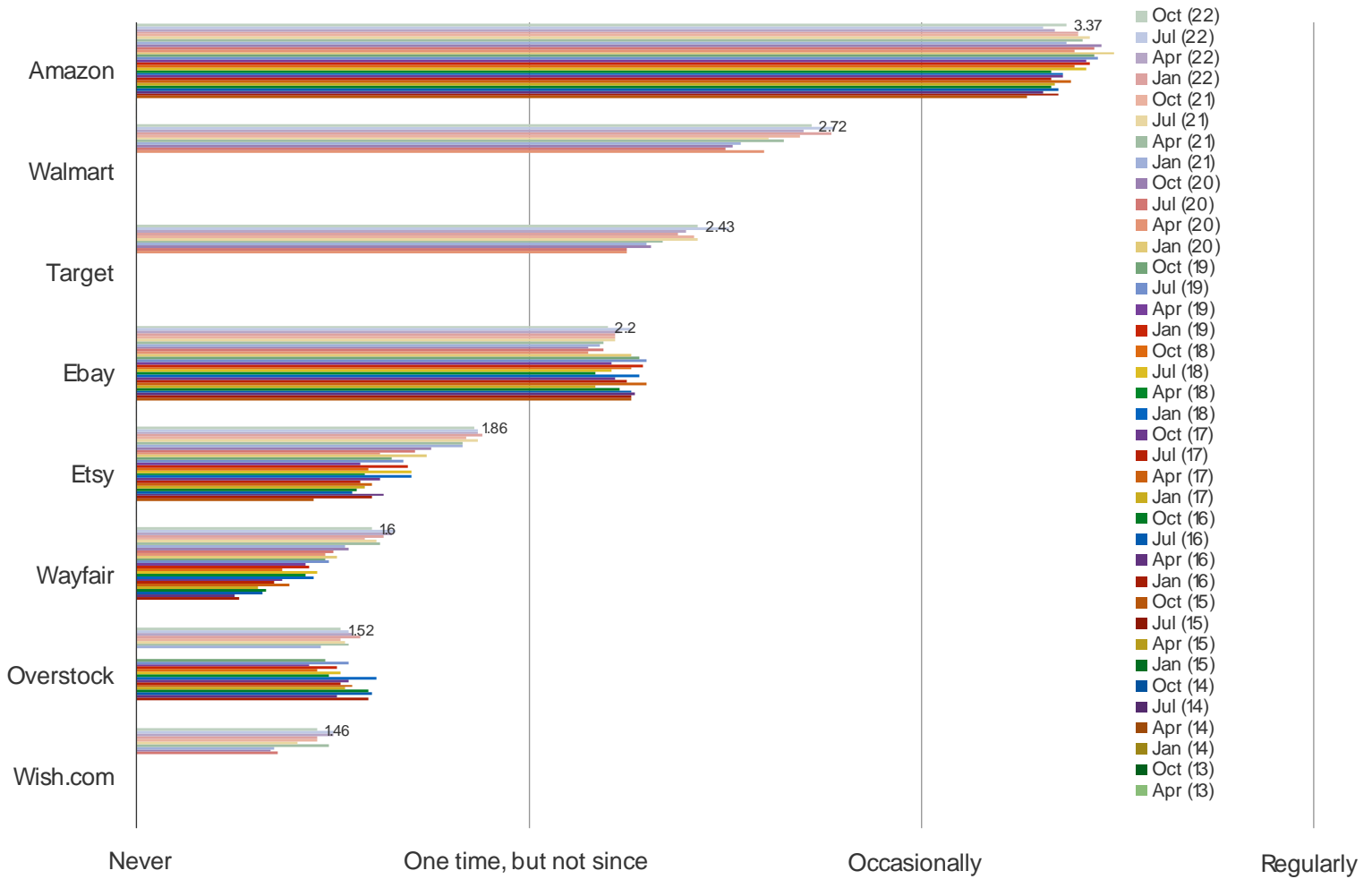
Posed to all respondents



COMPETITIVE DYNAMICS

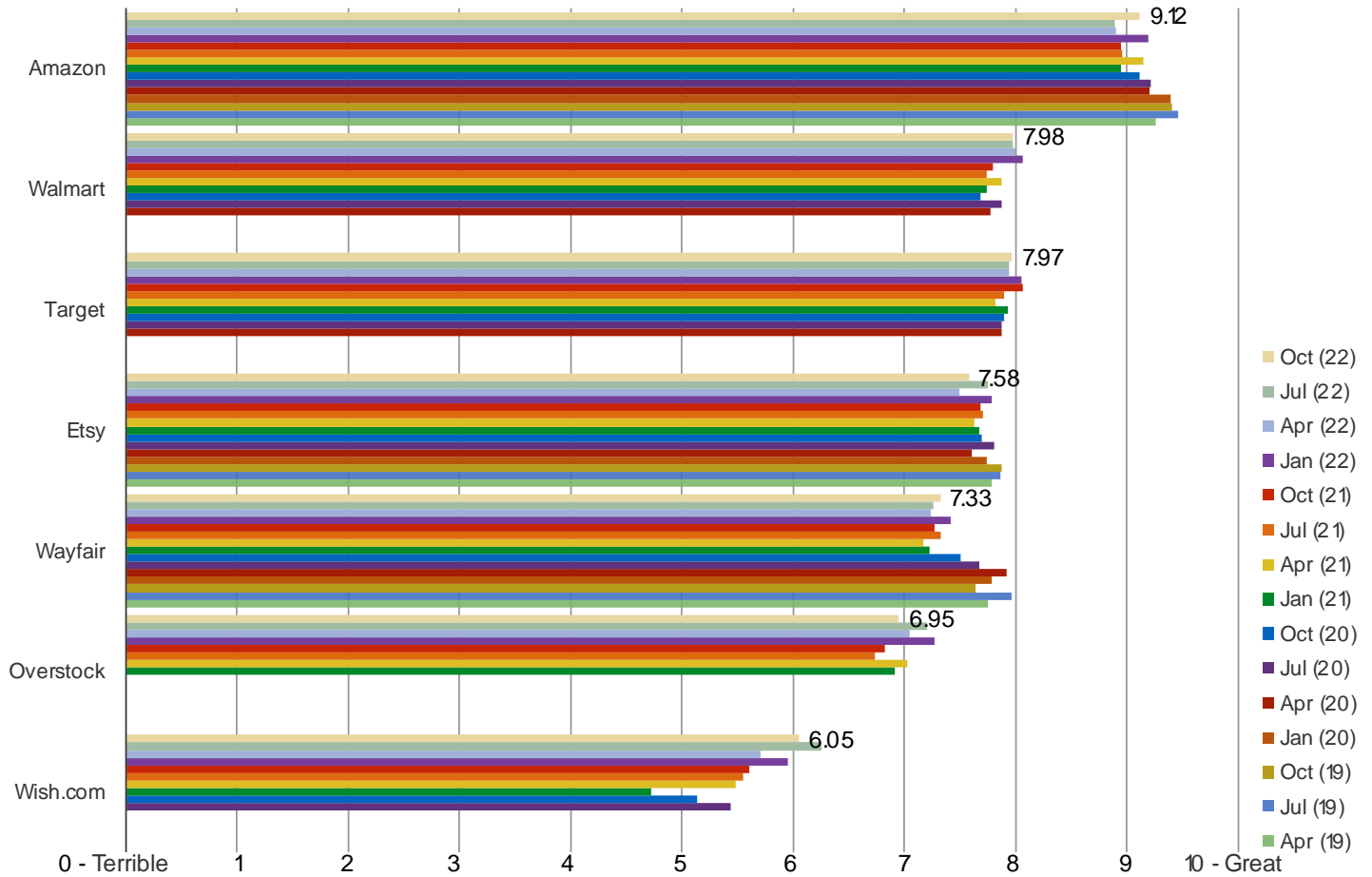
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



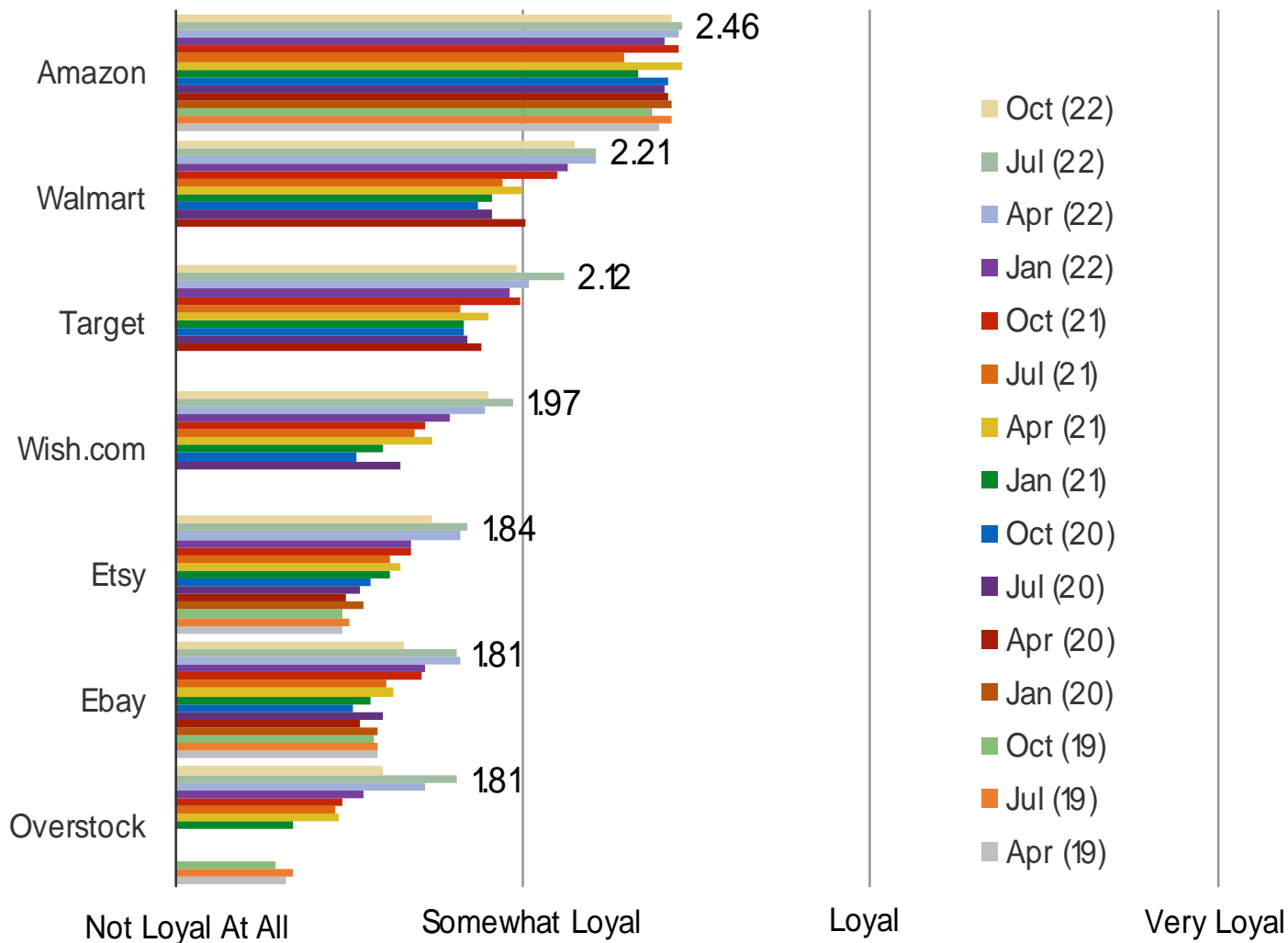
HOW DO YOU FIND THE SHIPPING EXPERIENCE WITH THIS APP/SITE?

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:

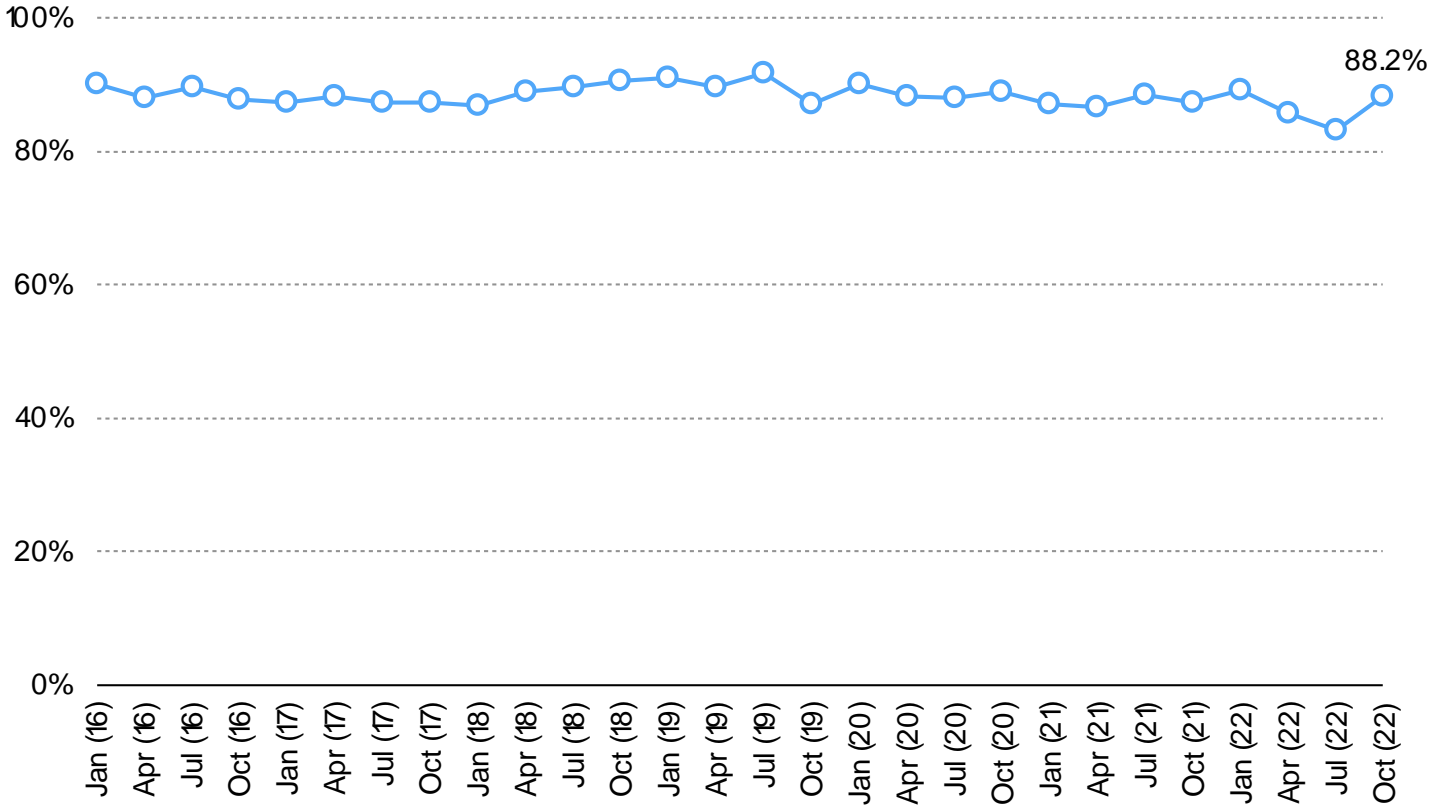
Posed to users of each site/app



AMZN TRENDS

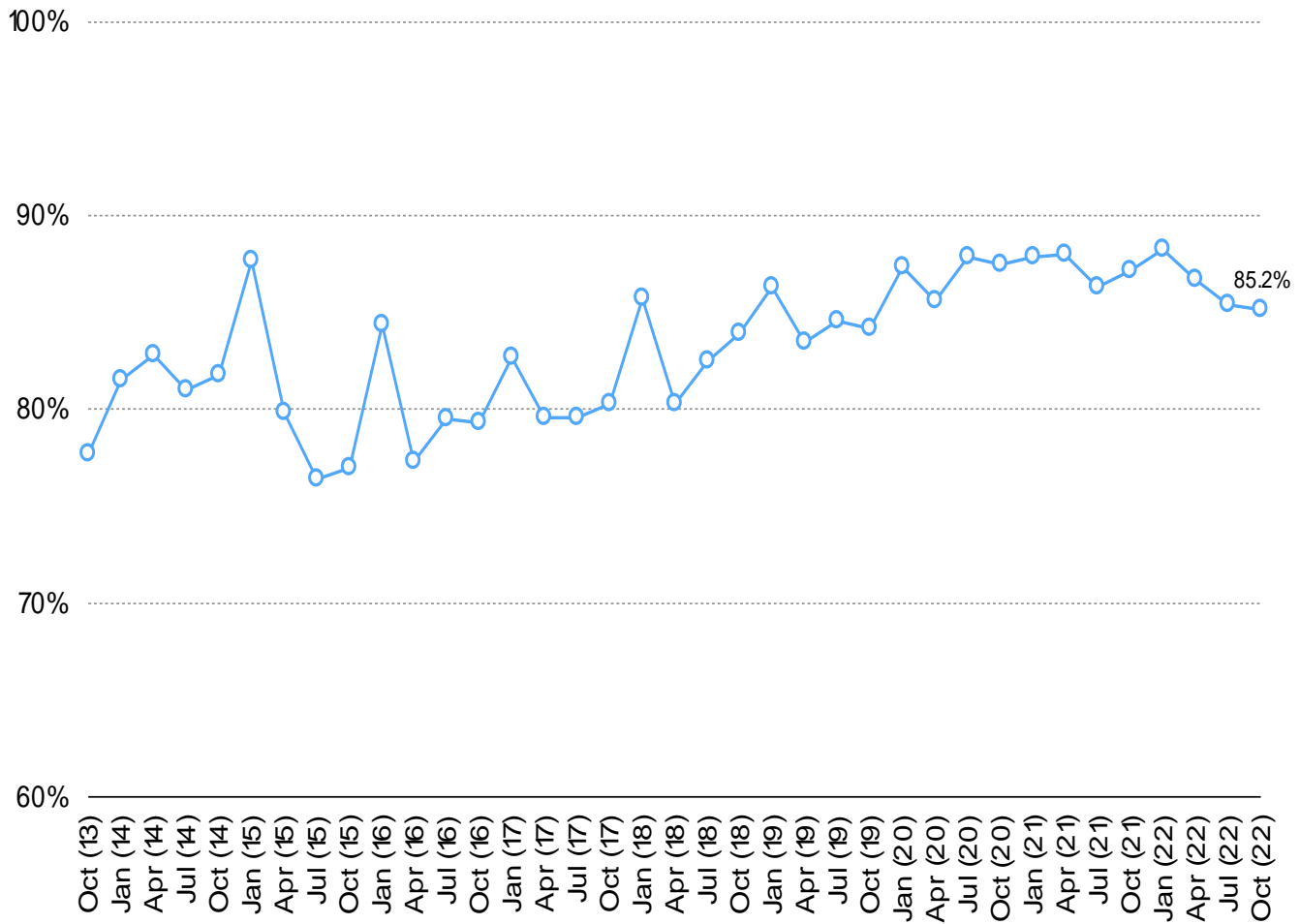
DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.



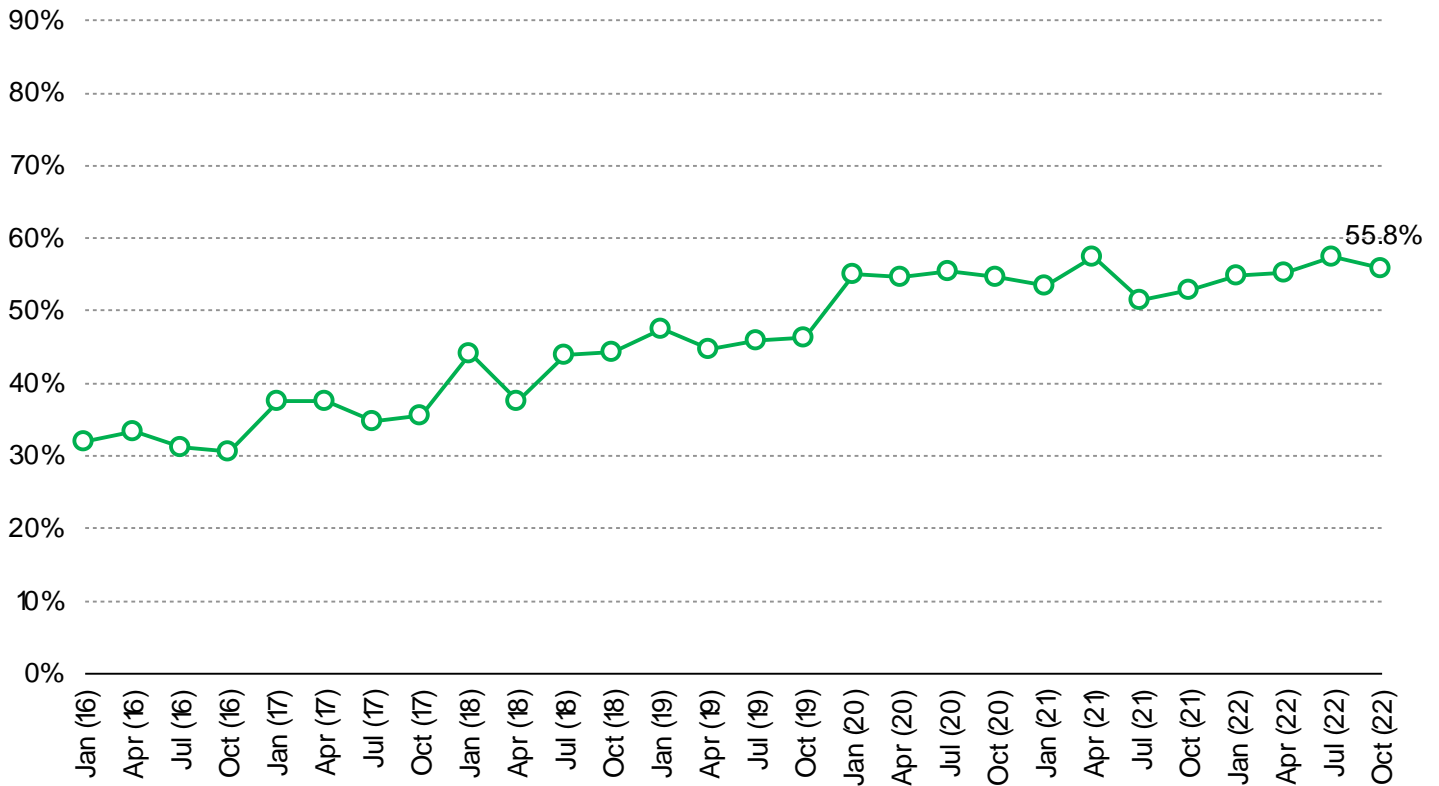
AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

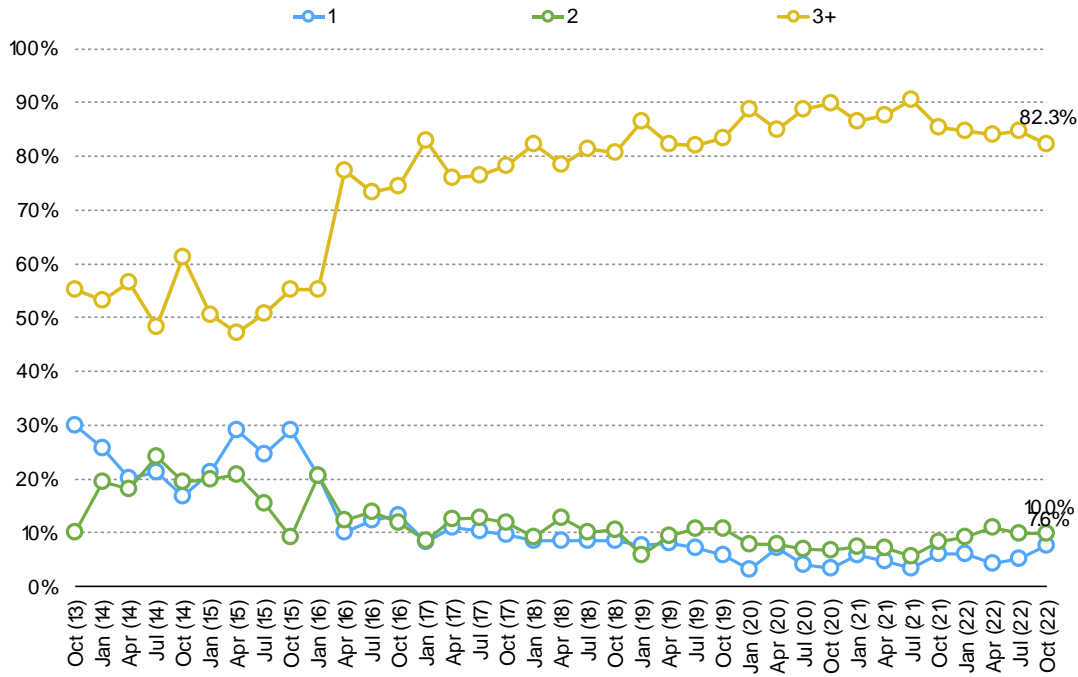


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

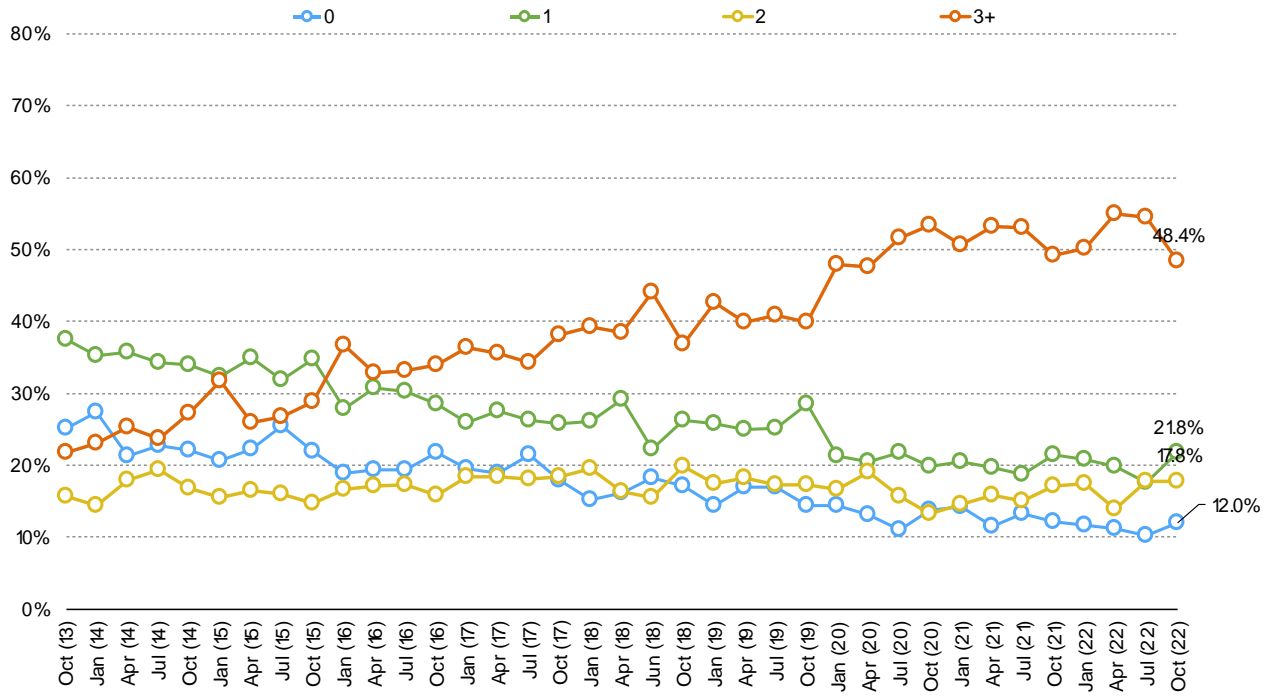
Posed to Amazon users



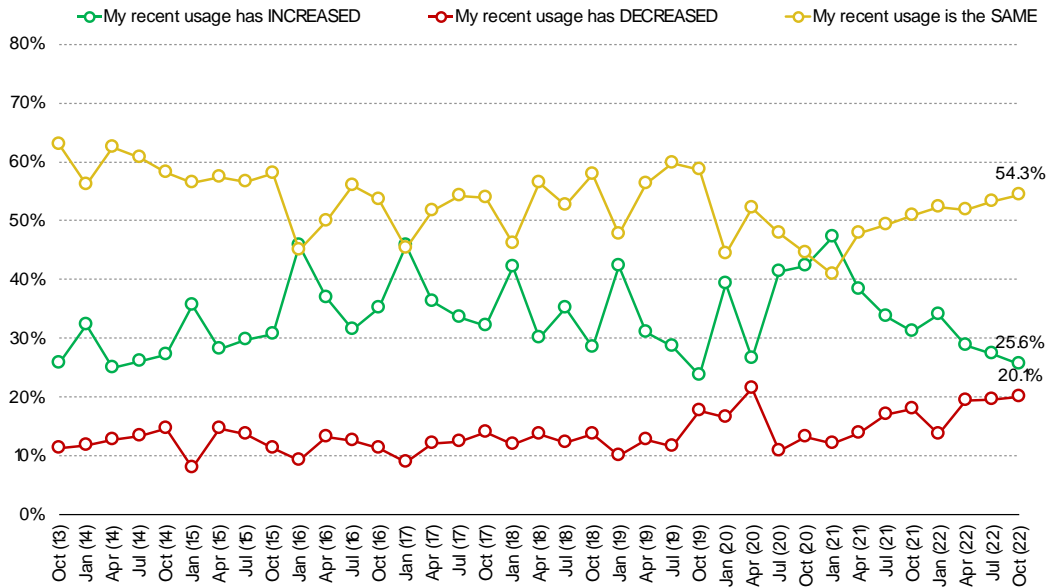
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



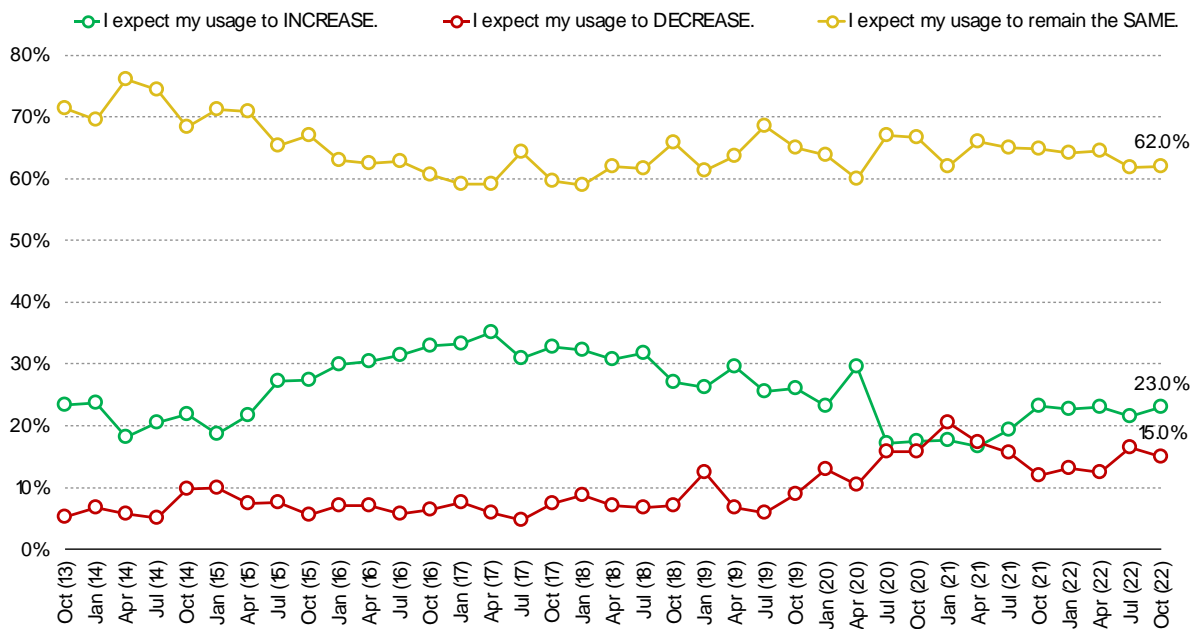
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



AMAZON USERS – RECENT USAGE

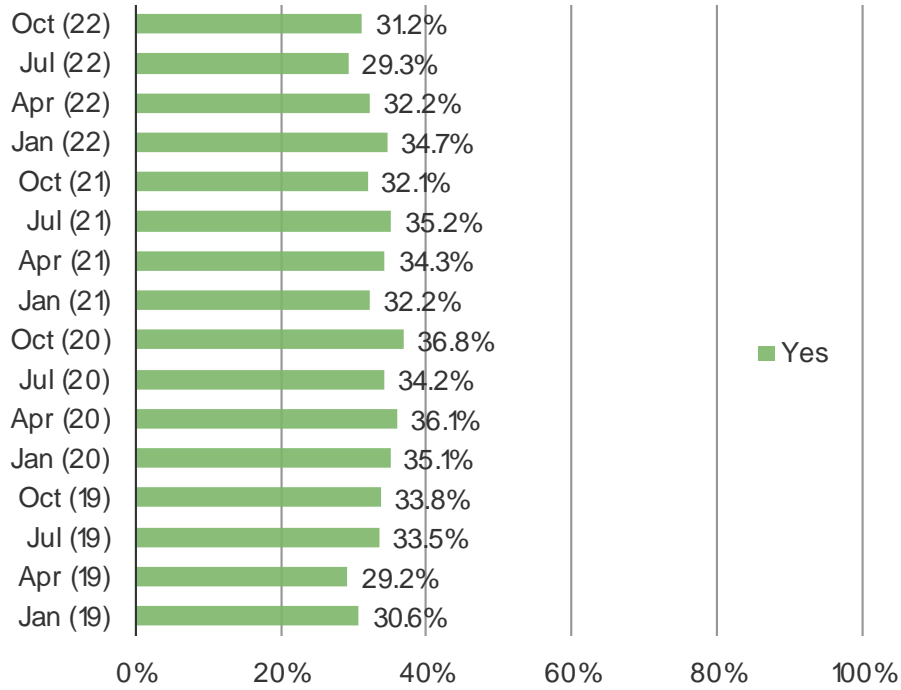


AMAZON USERS – EXPECTED USAGE

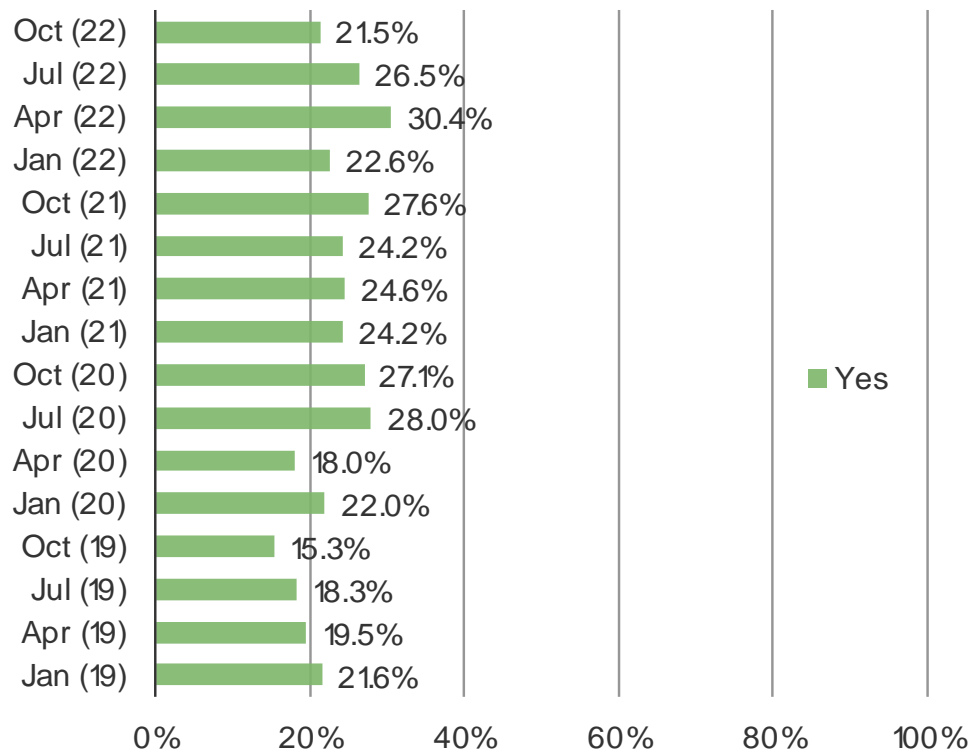


WAYFAIR TRENDS

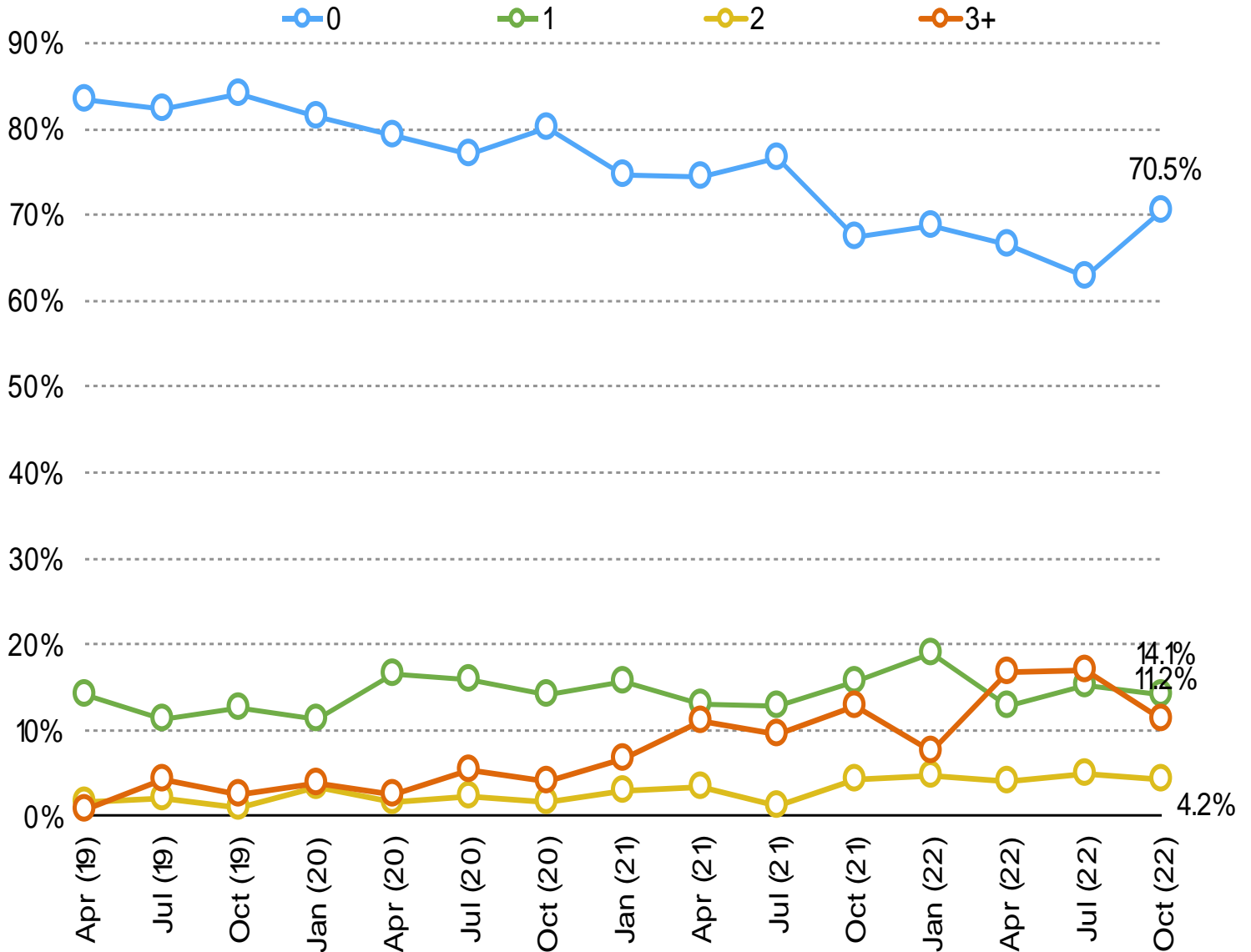
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



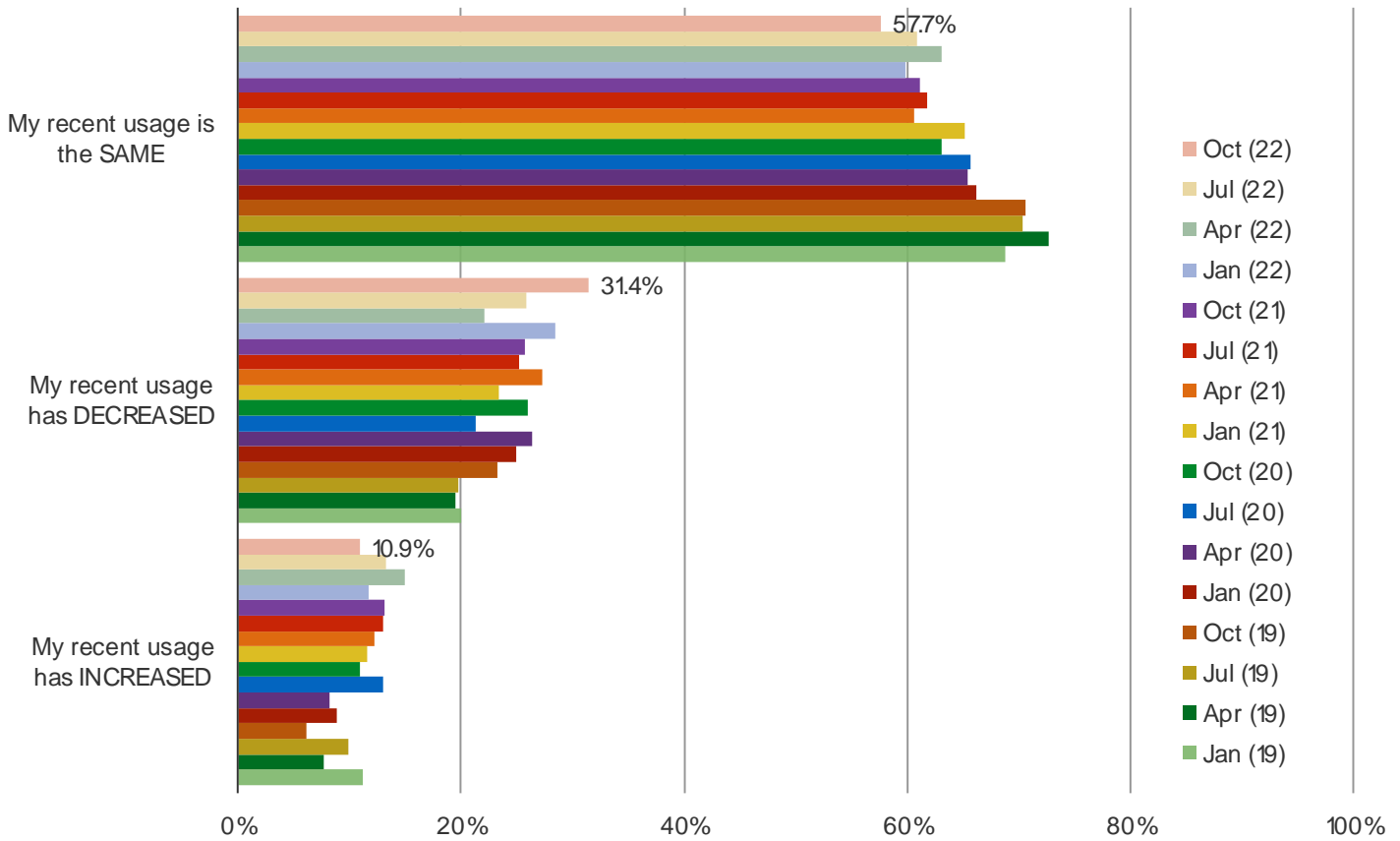
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?



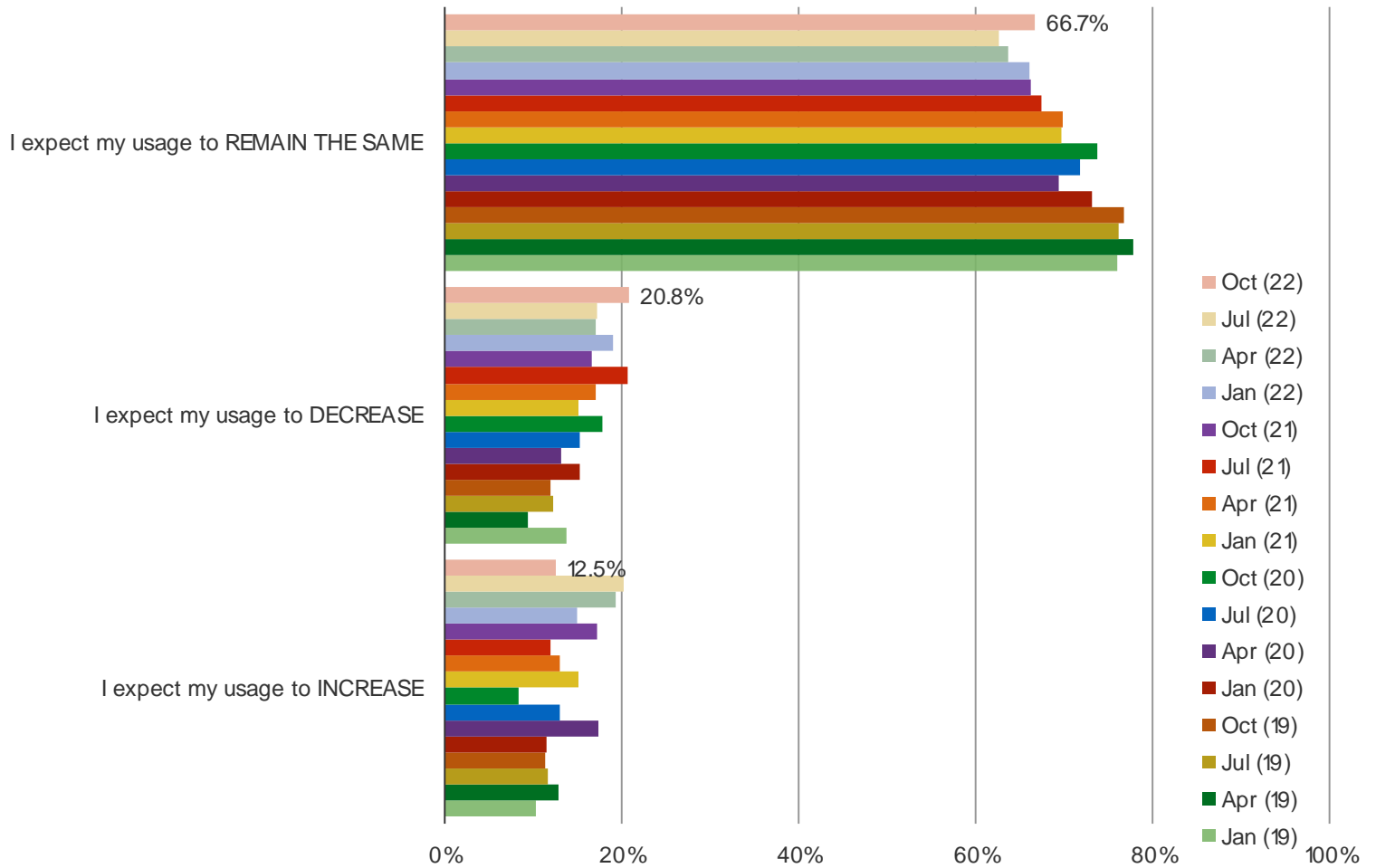
ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



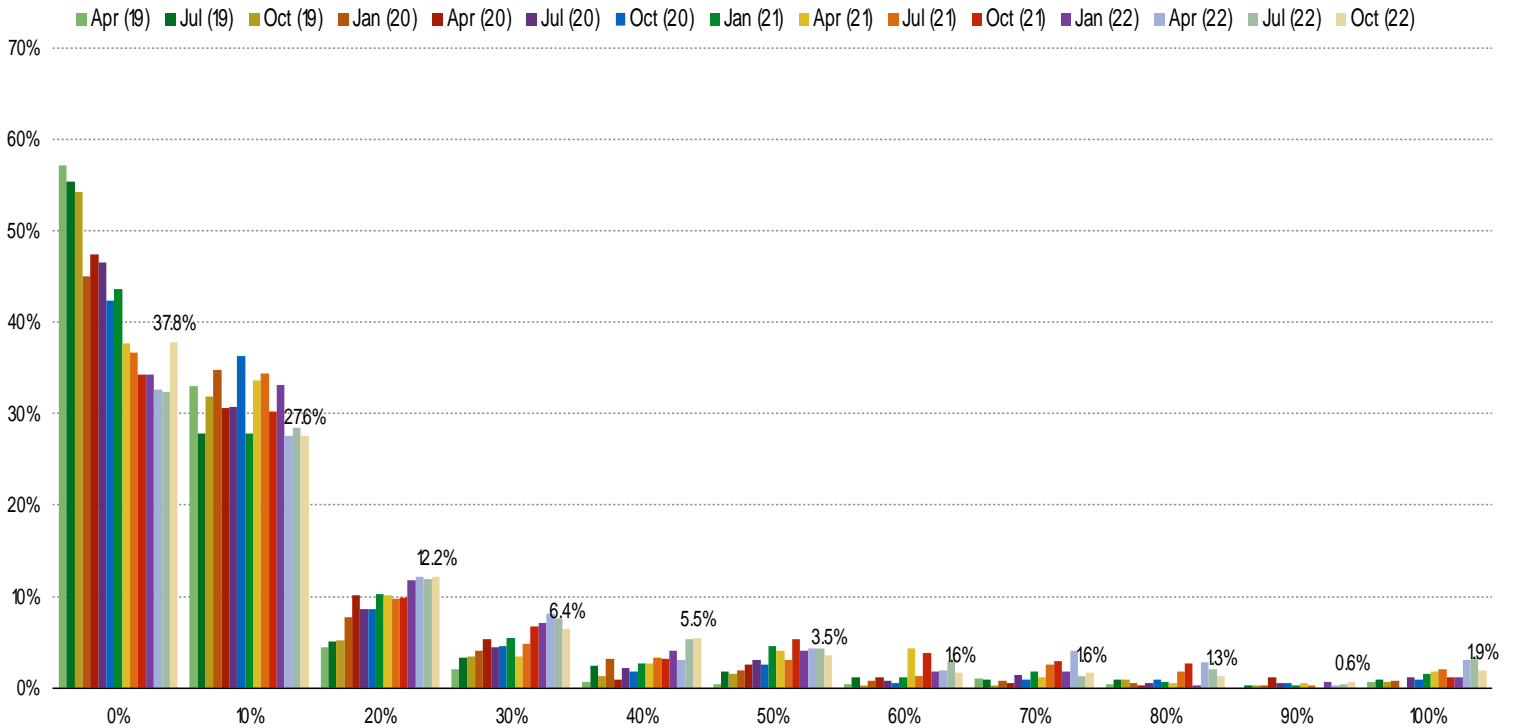
WAYFAIR USERS – RECENT USAGE



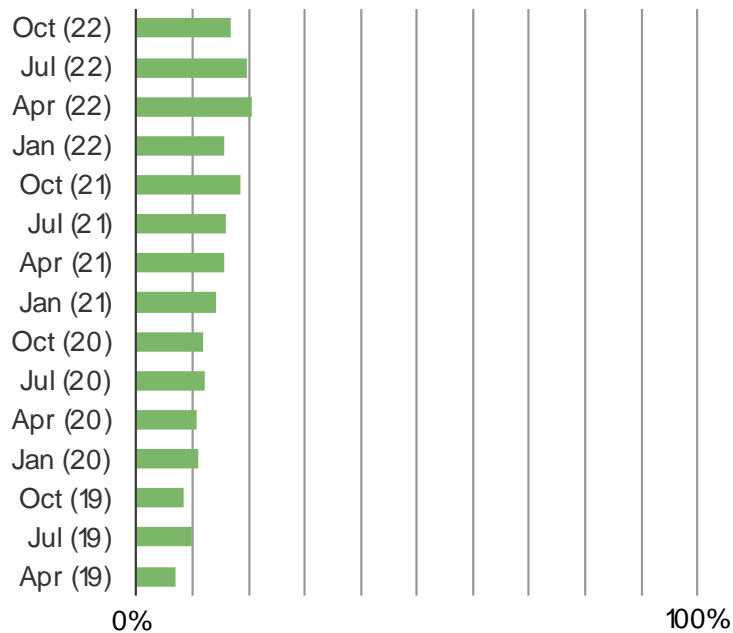
WAYFAIR USERS – EXPECTED USAGE



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

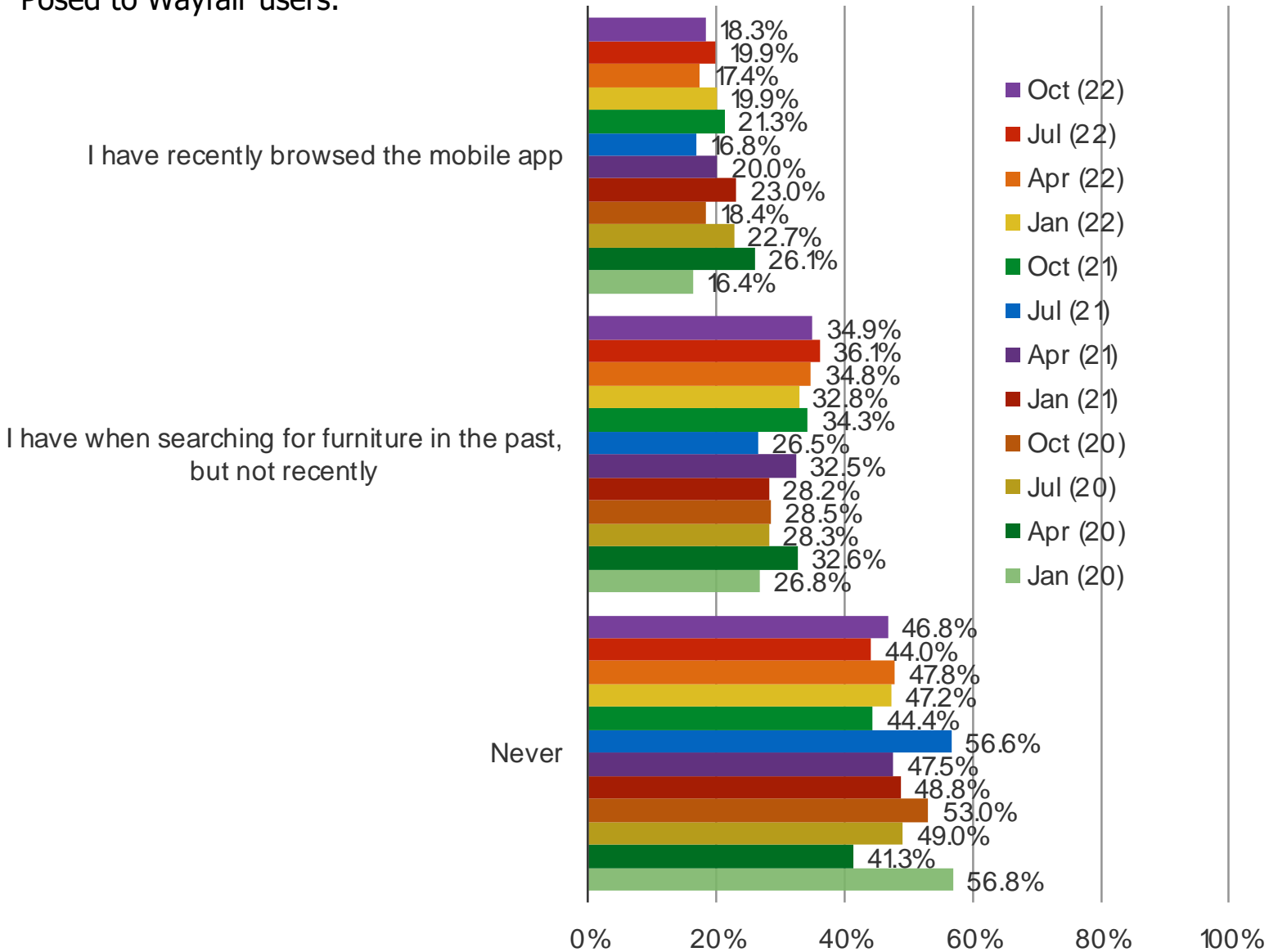


Weighted Average of Chart Above:



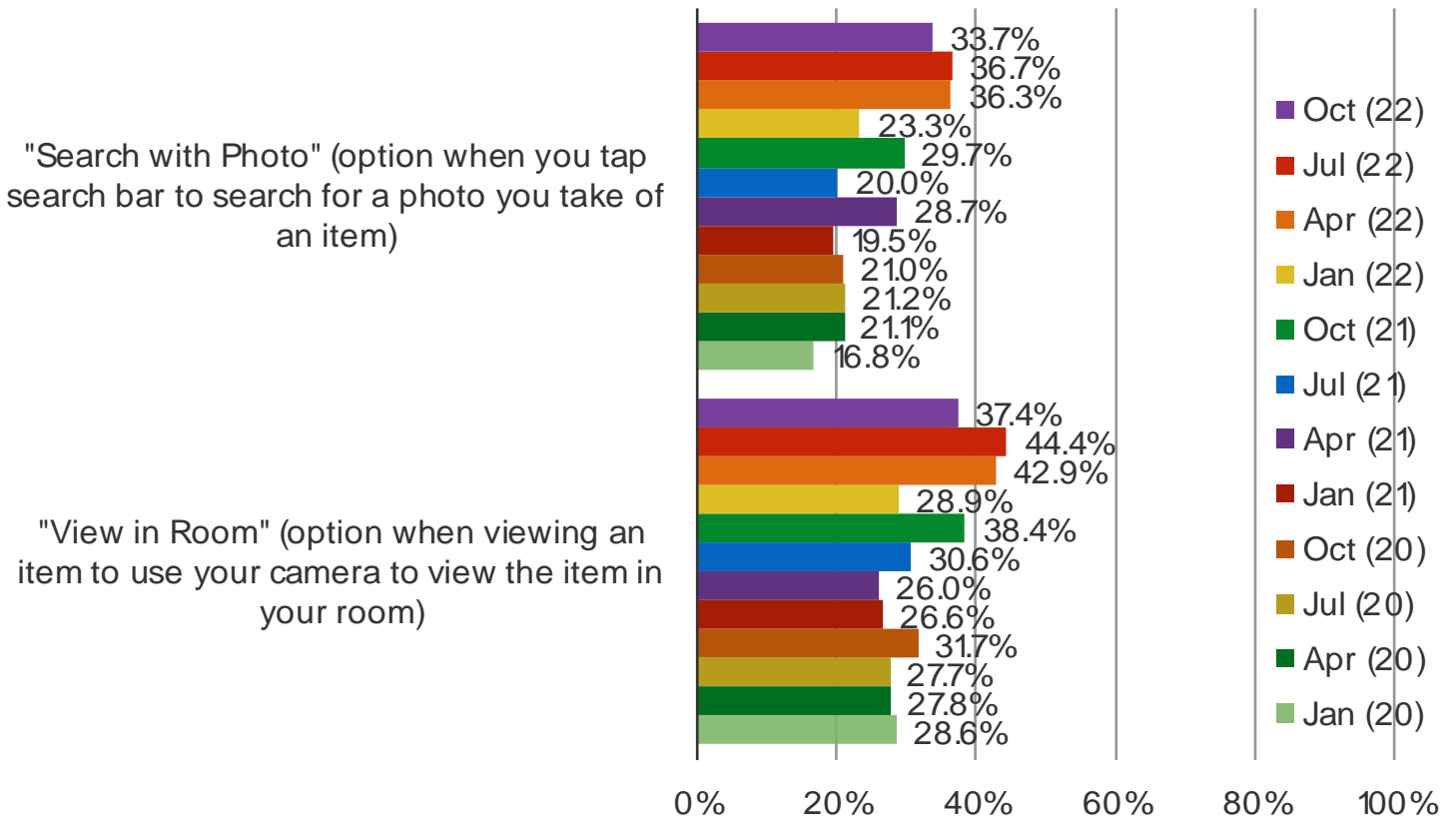
HAVE YOU EVER BROWSED THE WAYFAIR MOBILE APP FOR ITEMS?

Posed to Wayfair users.



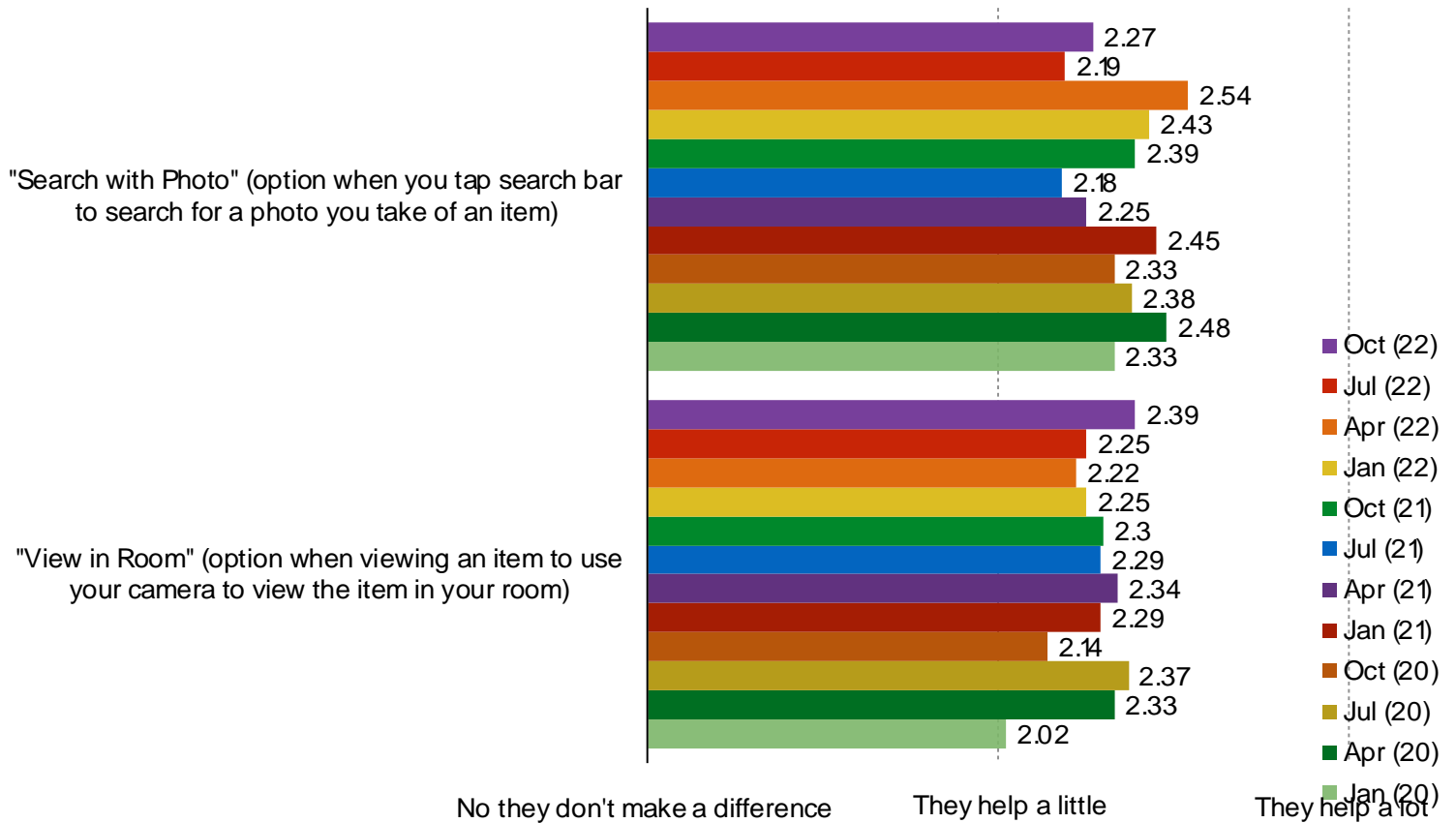
HAVE YOU USED ANY OF THE FOLLOWING FEATURES WHILE BROWSING WAYFAIR?

Posed to Wayfair users who have browsed the mobile app.



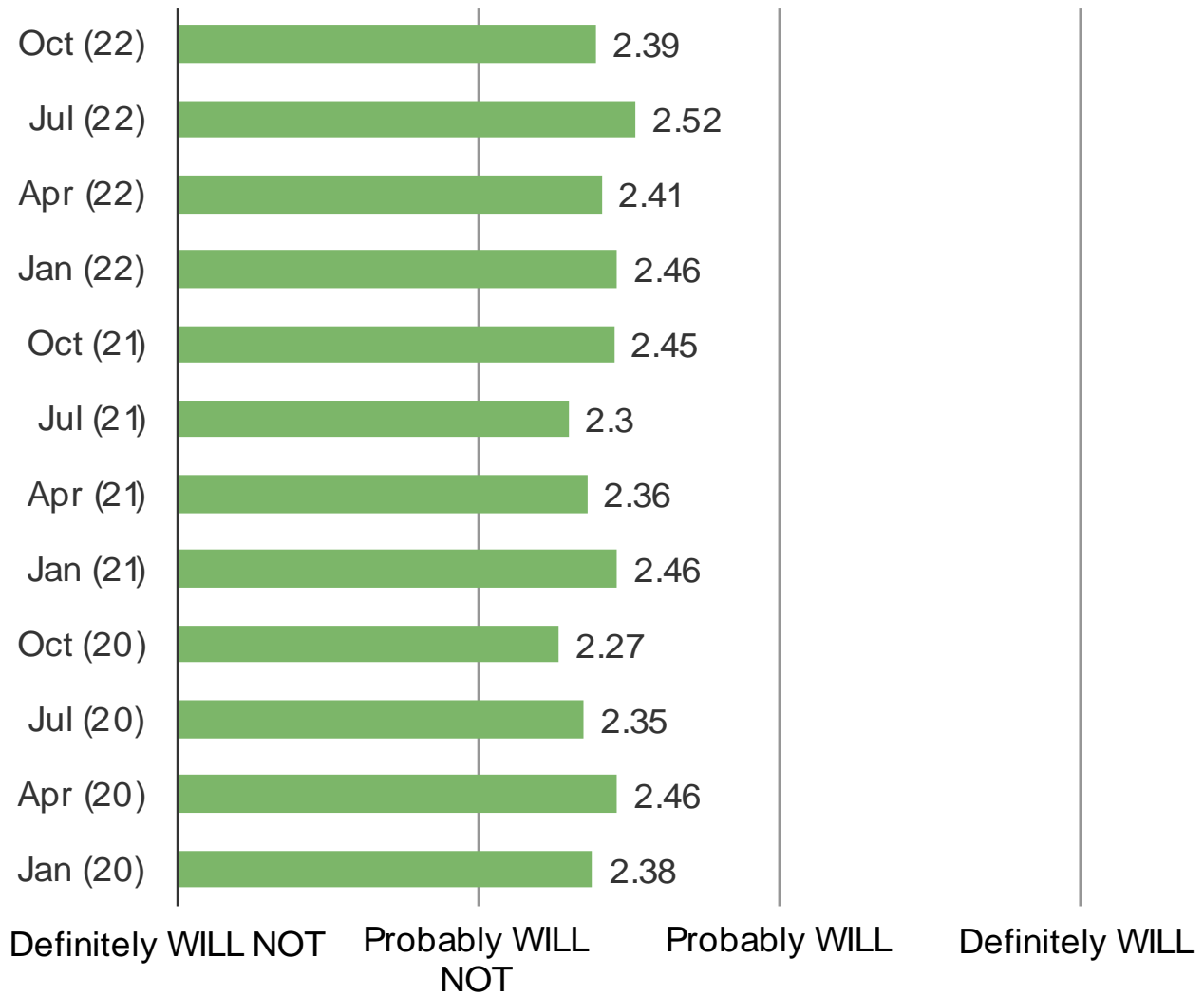
DO THESE FEATURES IMPROVE THE SEARCH AND EVALUATION OF PRODUCTS WHEN FURNITURE SHOPPING ONLINE?

Posed to Wayfair users who have used the following features.



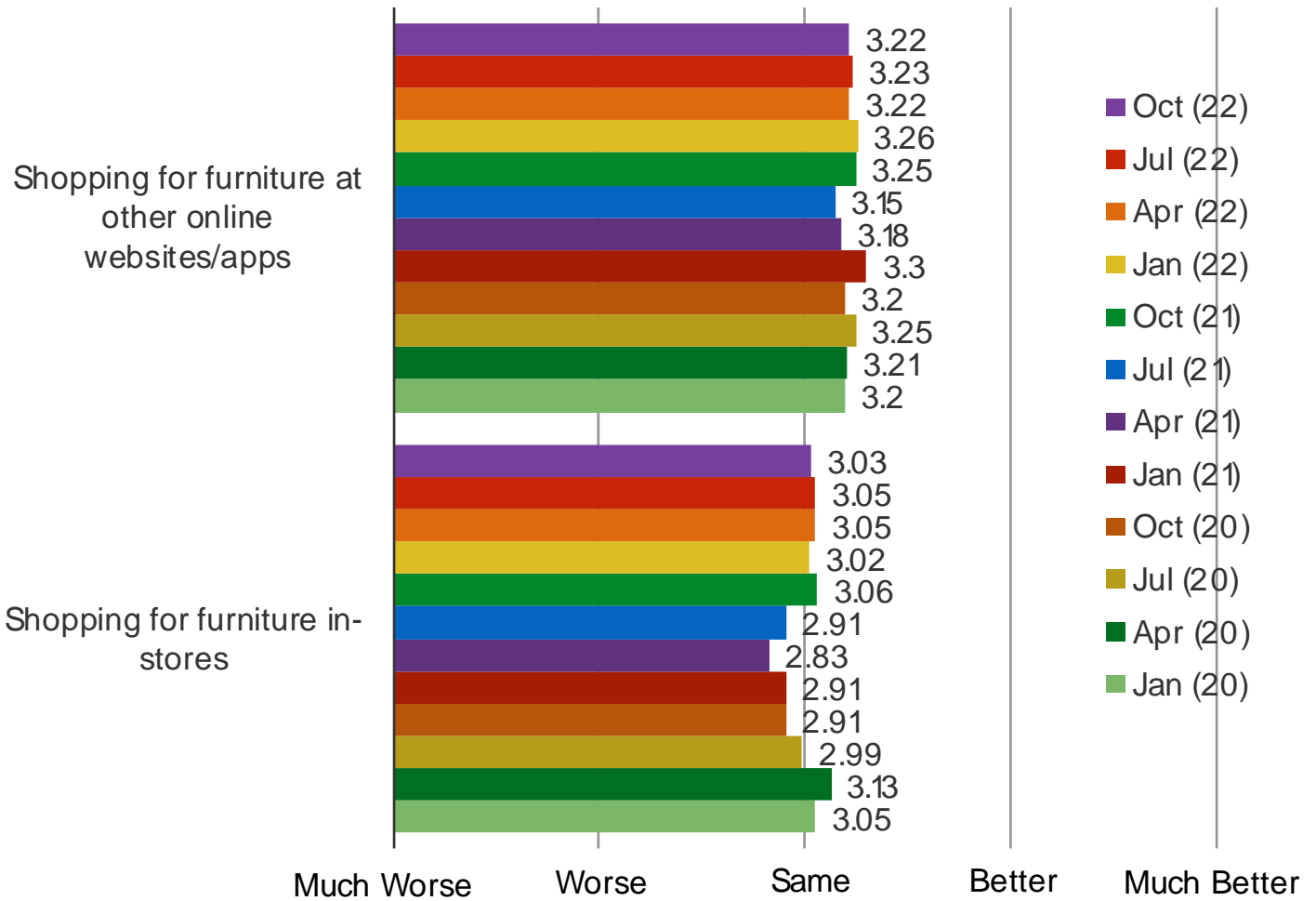
HOW LIKELY ARE YOU TO USE WAYFAIR FOR YOUR NEXT FURNITURE PURCHASE?

Posed to Wayfair users.



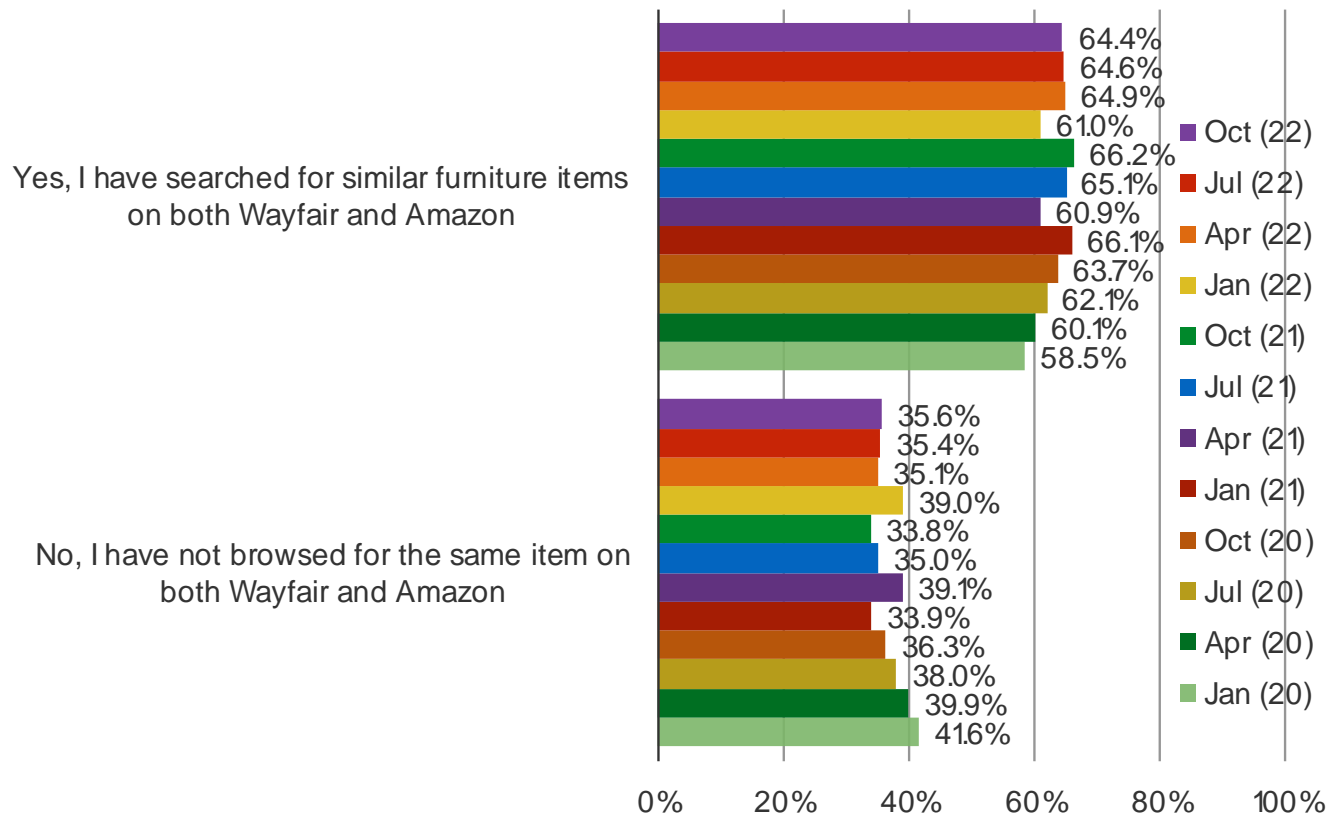
HOW DOES THE WAYFAIR SHOPPING EXPERIENCE COMPARE TO...

Posed to Wayfair users.



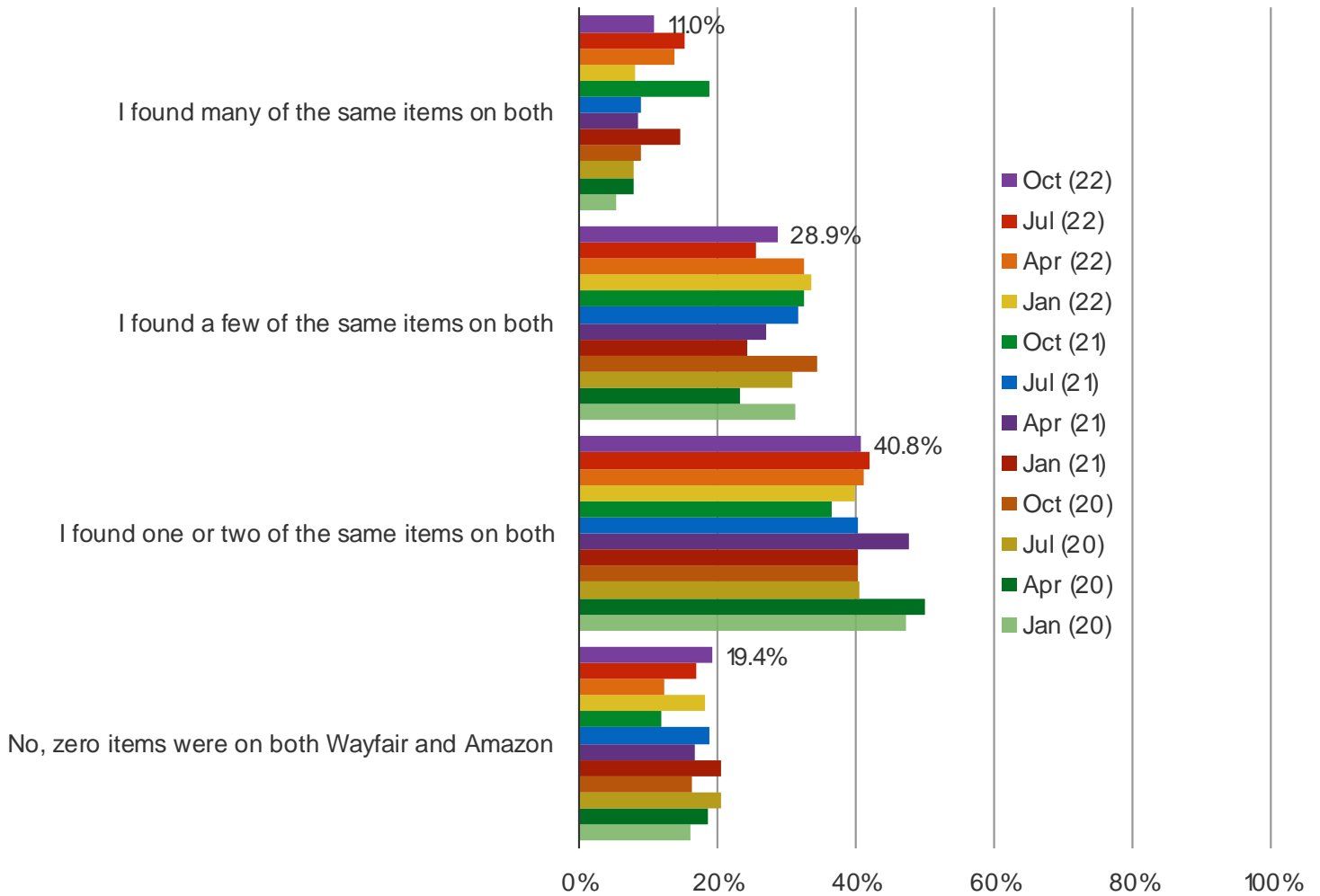
HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.



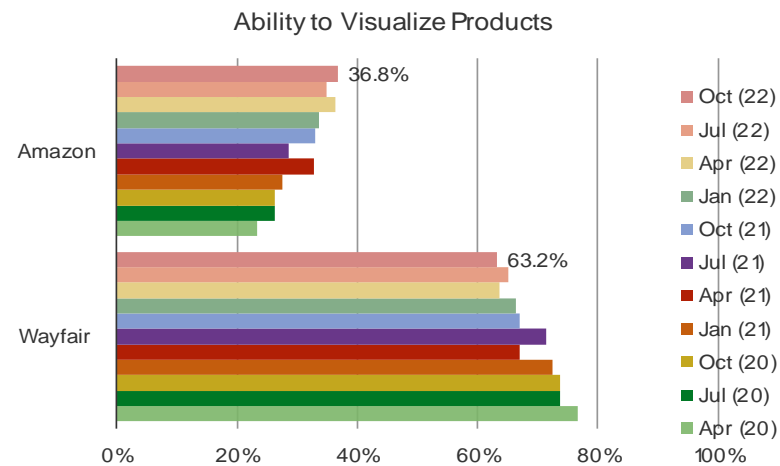
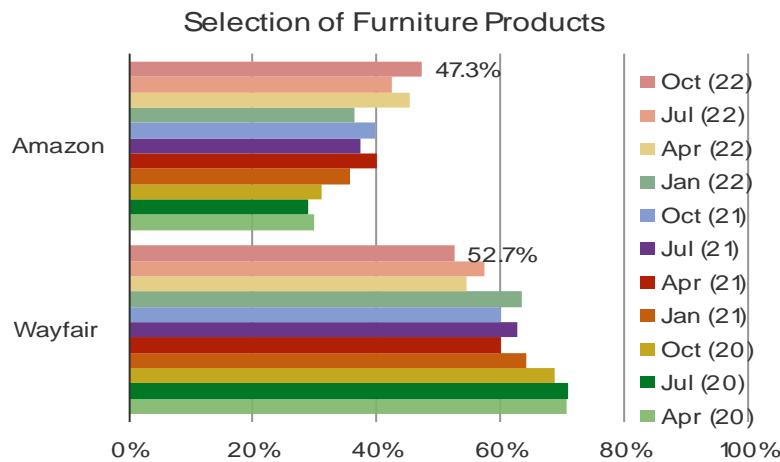
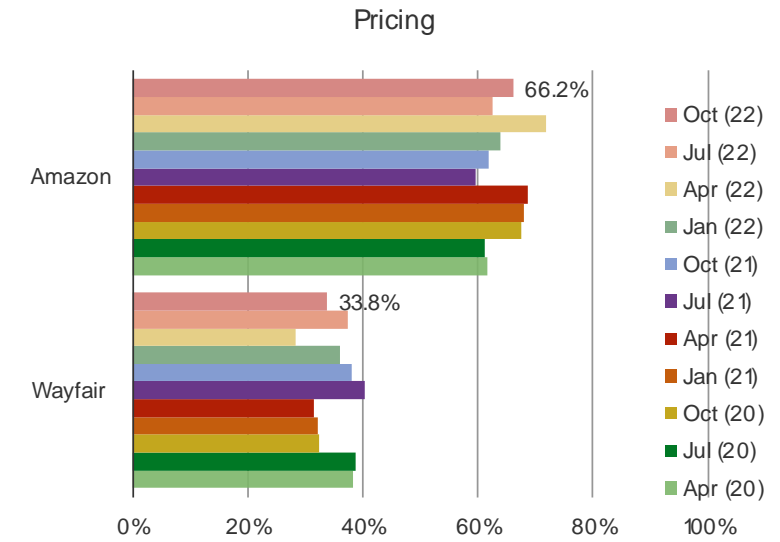
IN THE COURSE OF YOUR SEARCH, DID YOU FIND ANY ITEMS THAT WERE IDENTICAL AND LISTED ON BOTH WAYFAIR AND AMAZON?

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



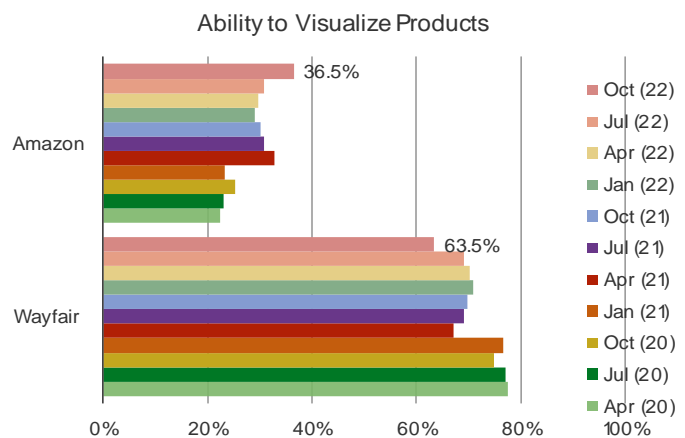
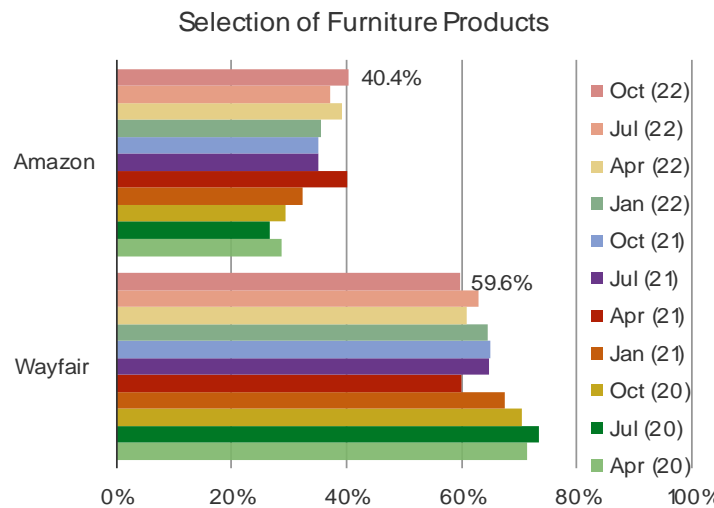
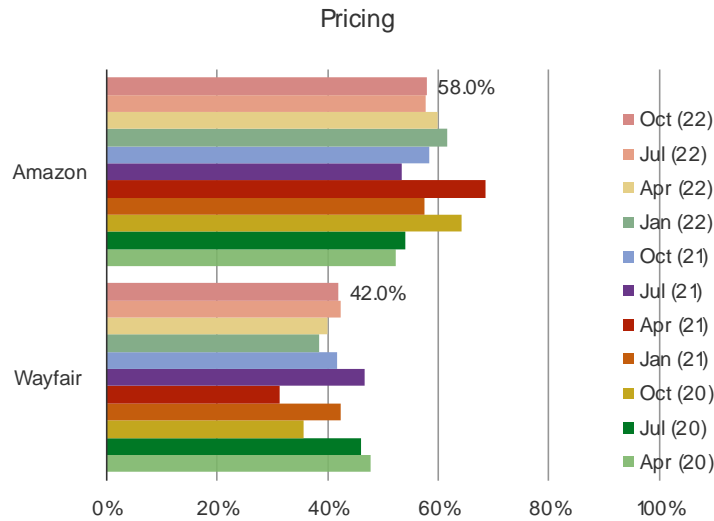
WHEN YOU WERE SHOPPING FOR THE SAME FURNITURE CATEGORY ON BOTH WAYFAIR AND AMAZON, WHICH PLATFORM HAD BETTER...

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



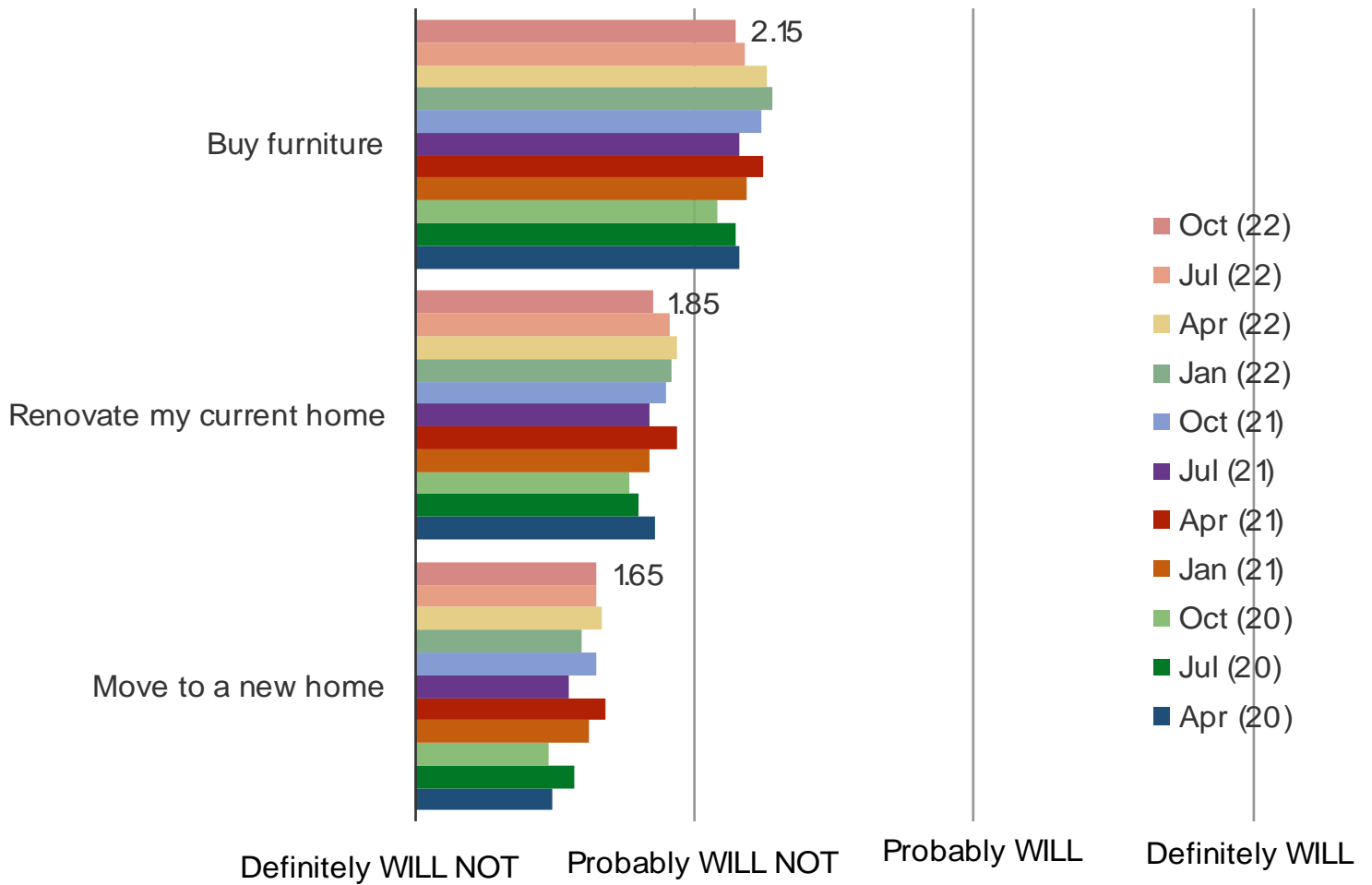
IF YOU NEEDED TO SHOP FOR A TYPE OF FURNITURE TODAY, WHICH PLATFORM DO YOU THINK WOULD HAVE BETTER...

Posed to ALL Wayfair users.



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

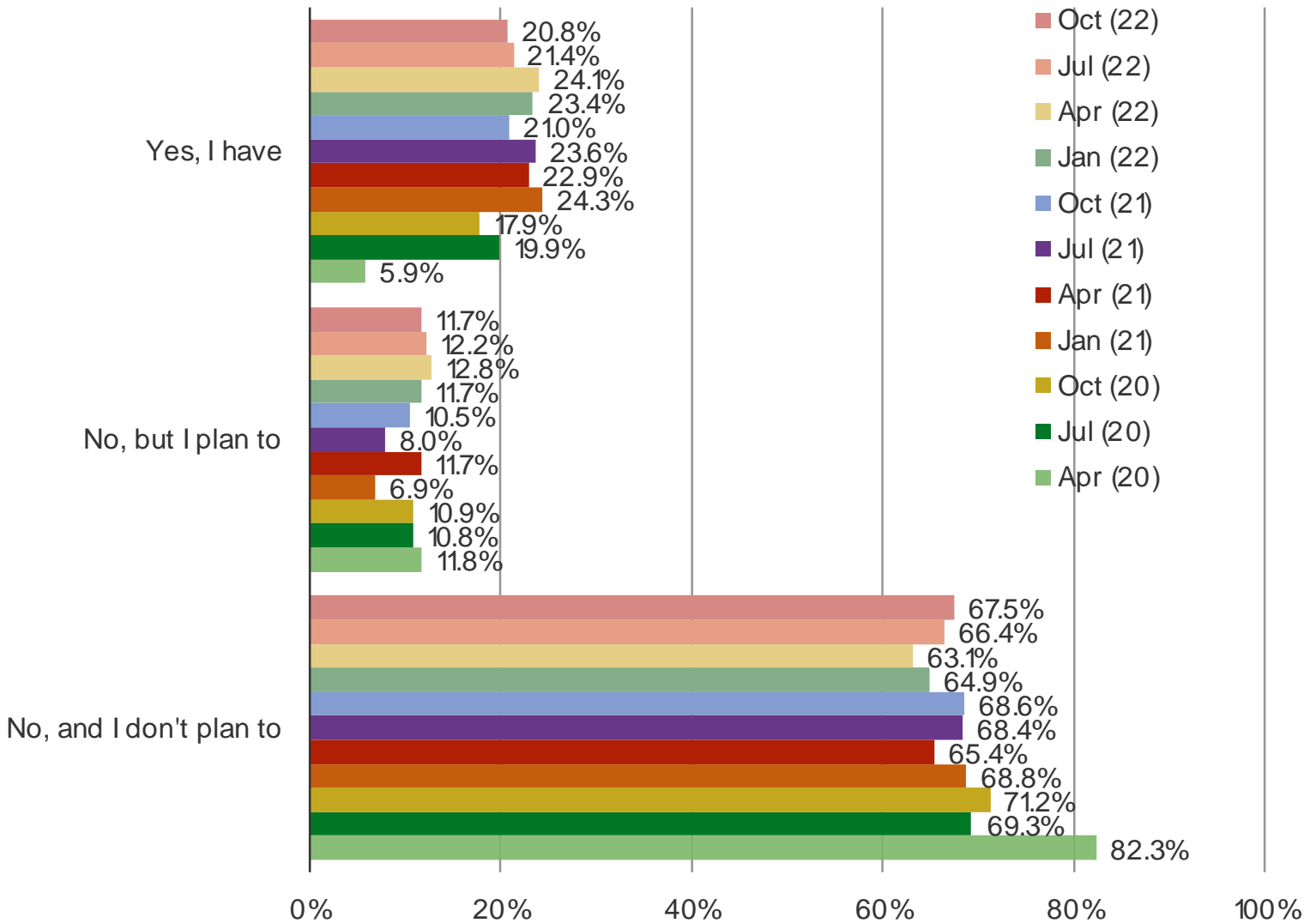
Posed to ALL respondents.



ETSY TRENDS

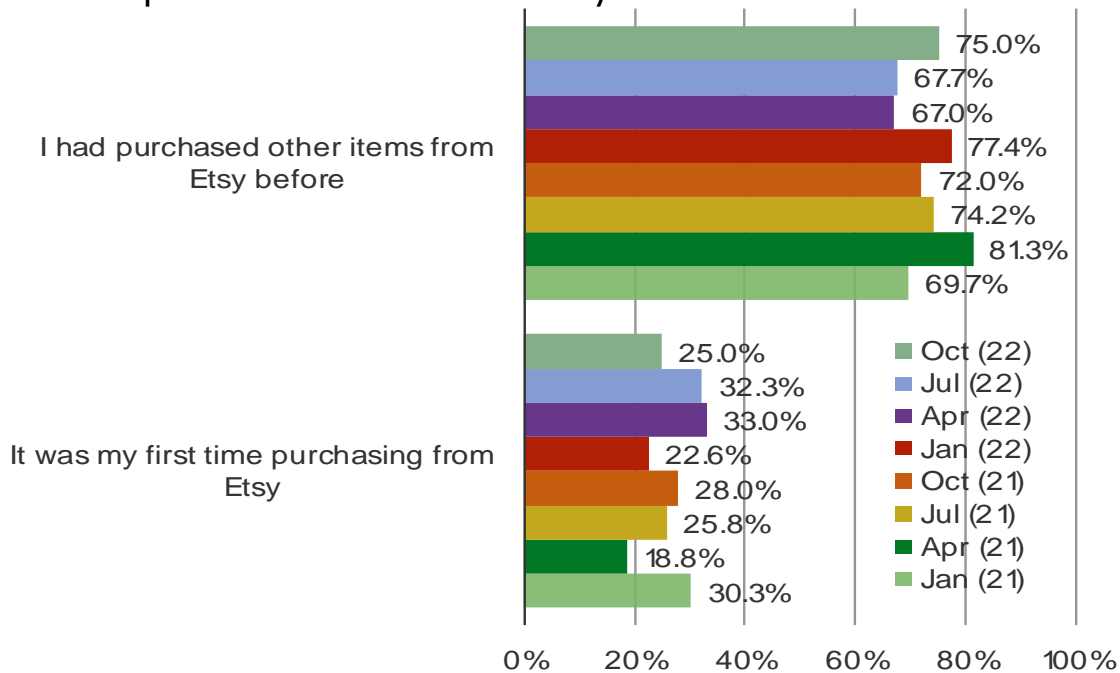
HAVE YOU PURCHASED ANY MASKS / PROTECTIVE FACE MASKS ON ETSY IN THE PAST MONTH OR TWO?

Posed to Etsy users.



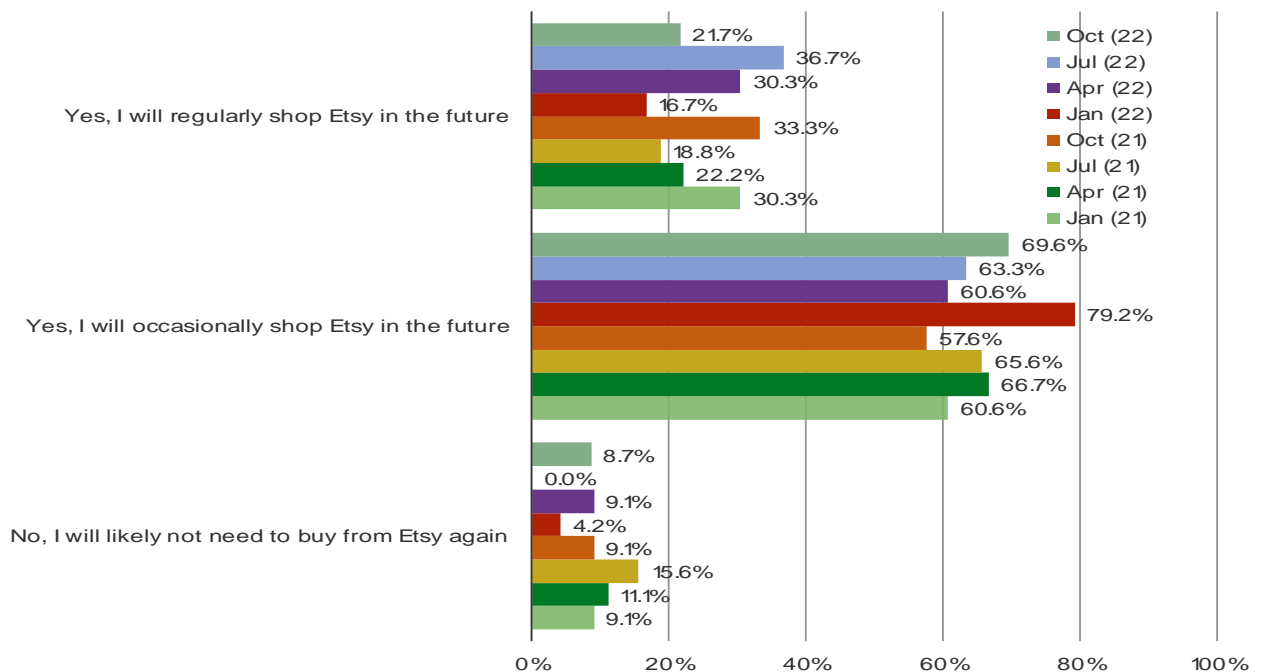
THINKING ABOUT YOUR MASK PURCHASE FROM ETSY, WAS IT YOUR FIRST TIME PURCHASING AN ITEM FROM ETSY OR HAD YOU ALREADY PURCHASED OTHER ITEMS FROM ETSY BEFORE?

Posed to users who purchased a mask from Etsy.

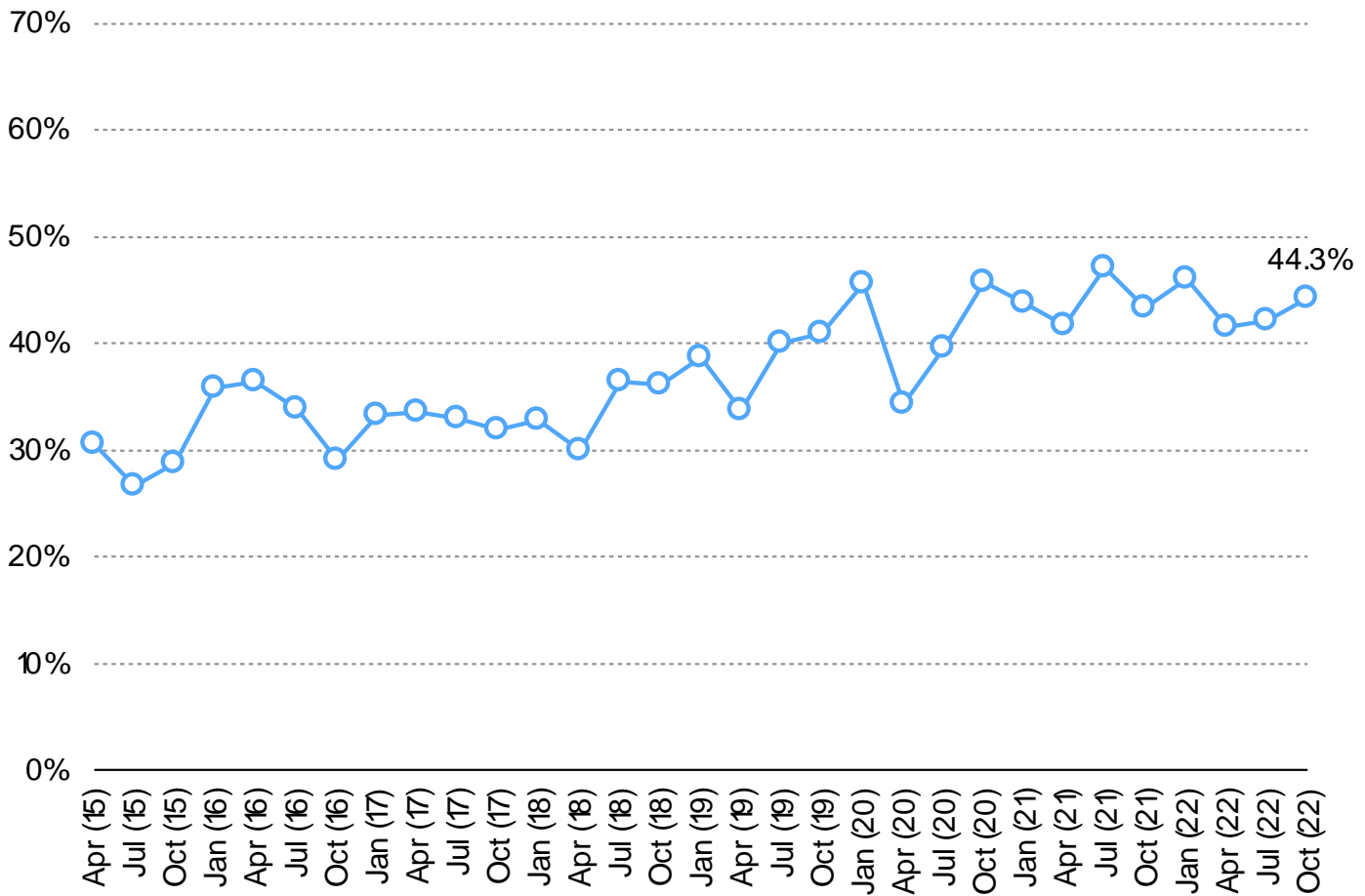


DO YOU EXPECT TO CONTINUE SHOPPING FOR PRODUCTS ON ETSY IN THE FUTURE?

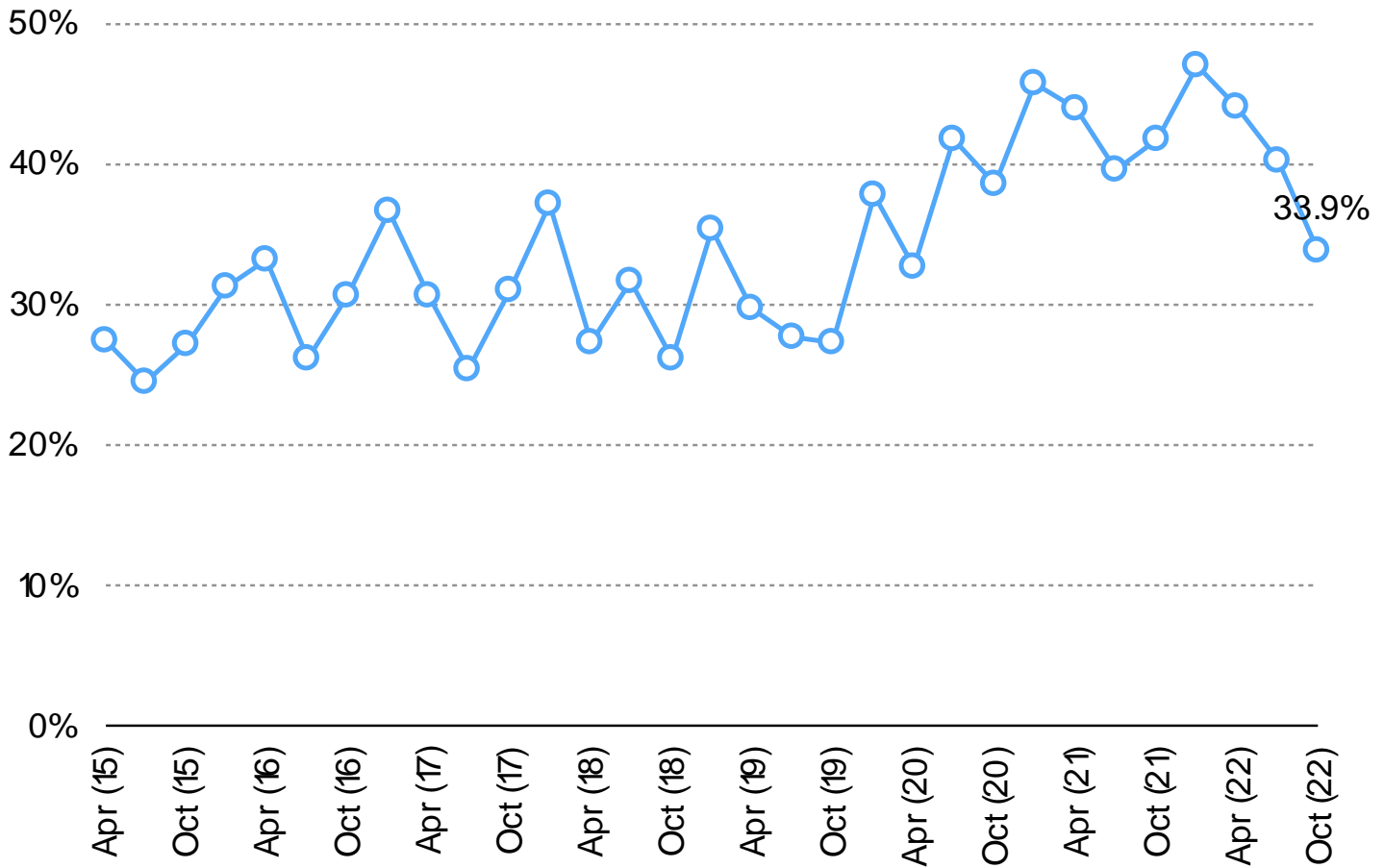
Posed to users whose first purchase from Etsy was a mask.



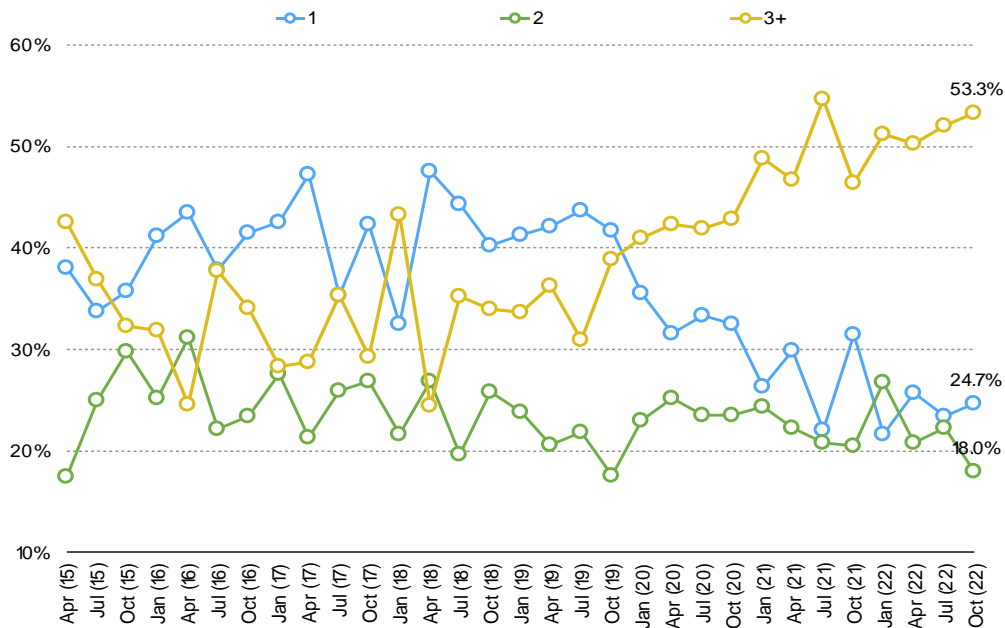
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



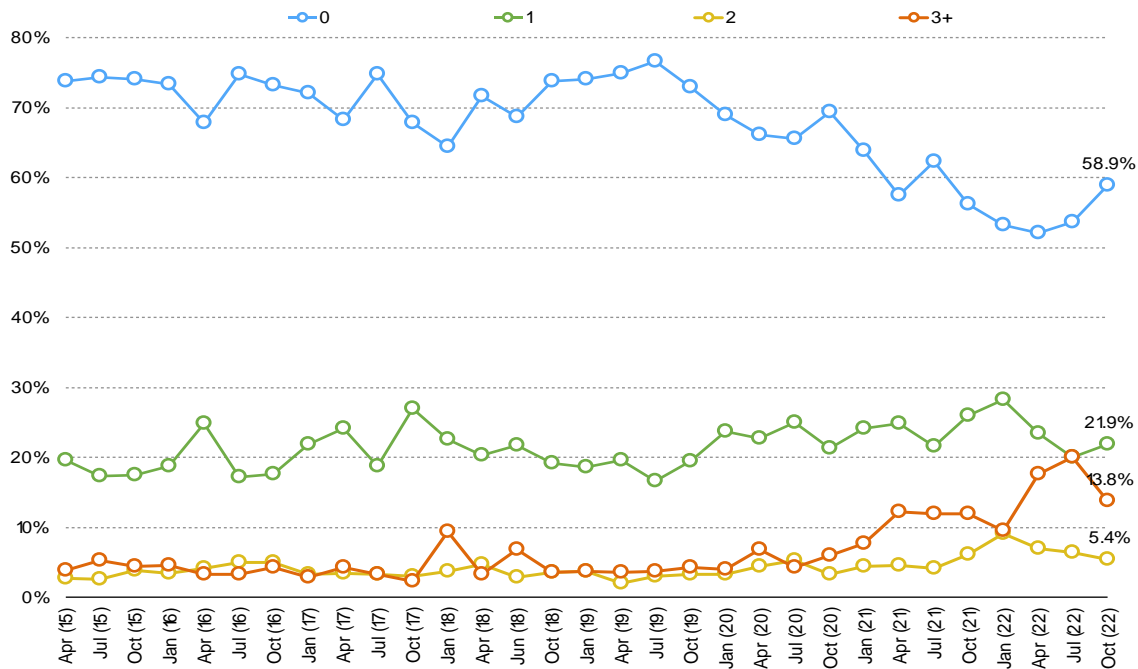
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



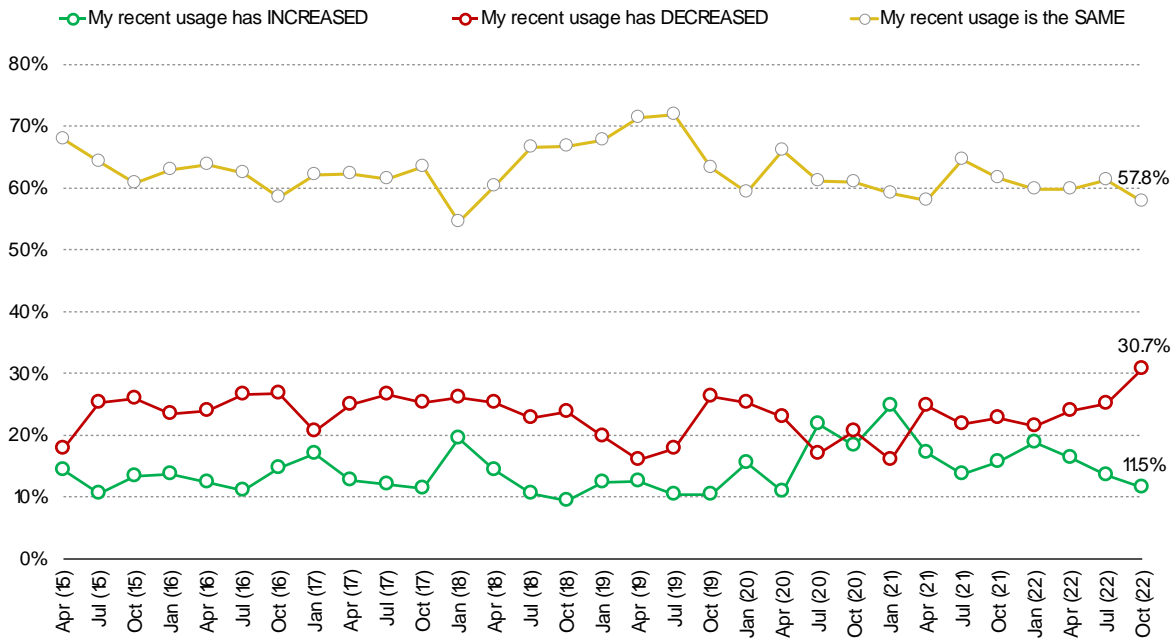
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



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



ETSY USERS – RECENT USAGE



ETSY USERS – EXPECTED USAGE

