

# Bespoke Survey Research

April 2024

## Online Retailers

Volume 45 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: AMZN, ETSY, W, TEMU, OSTK, WISH, Shein, WMT, TGT, etc.

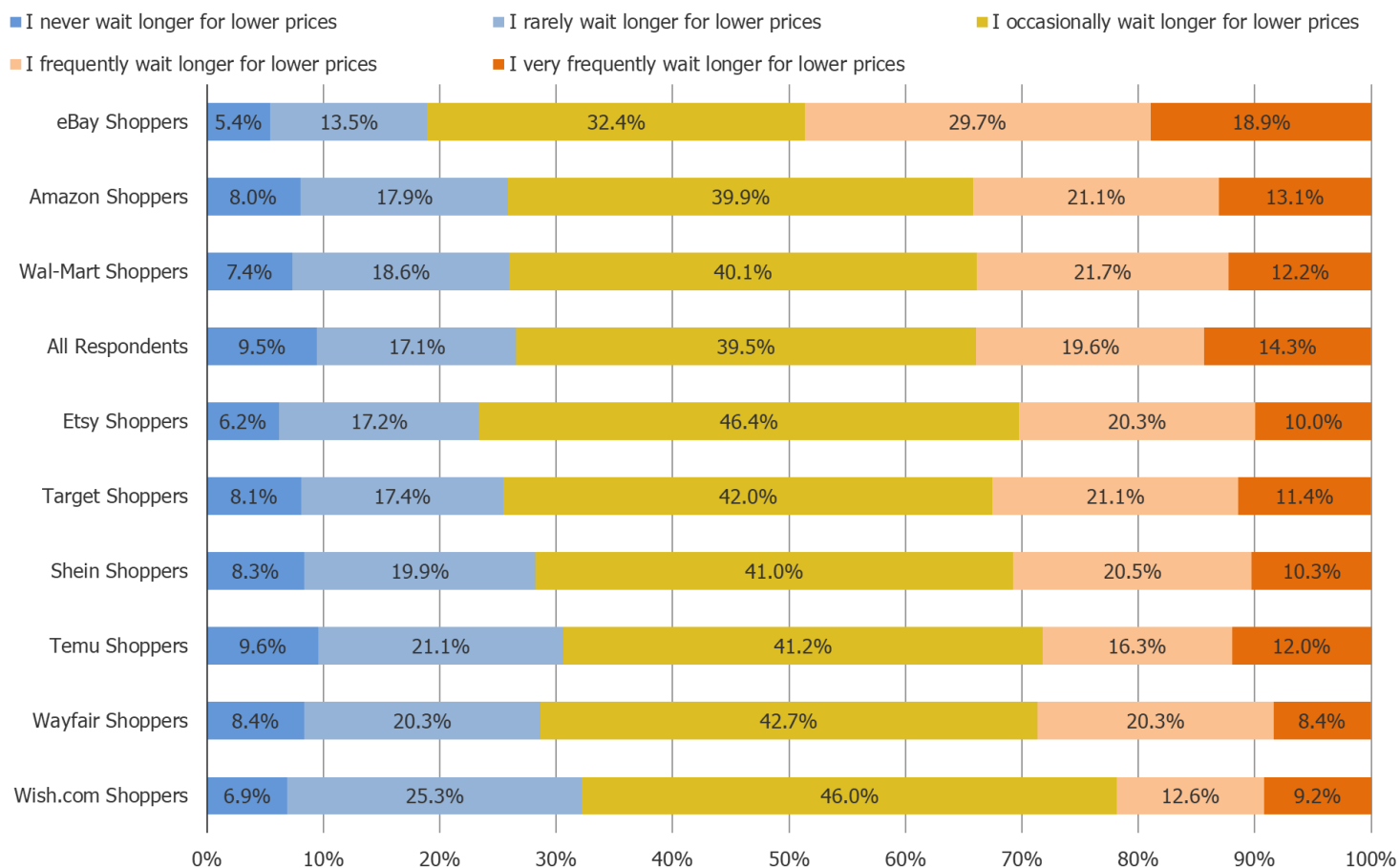
### Key Takeaways:

- ❑ eBay shoppers are the most likely to say they frequently wait longer for ship times in order to get lower prices. Notably, Amazon customers were more likely to say they wait longer for lower prices than Temu customers.
- ❑ After Amazon, Etsy customers are the most likely to say they buy gifts through the platform often. Etsy shopper awareness of “gift mode” is low, but feedback among those who have tried it is positive (strong NPS and highly likely to use it more for gifts because of gift mode).
- ❑ Consumer trust in the likes of Temu and Shein has declined over time, while trust in most of the other platforms we track is higher and mostly unchanged sequentially. We would note that with awareness of Temu and Shein increasing so much, declines in this type of metric might happen via a larger audience who are less likely to being early adopters or adopters at all becoming aware of the platform.
- ❑ The share of Wayfair users who cross-shop Amazon has declined a bit over the past 3 quarters. More than half of users do cross-shop, but the multi-quarter reduction is noteworthy.
- ❑ Consumer likelihood of moving, renovating, and buying furniture has been declining sequentially in our survey.
- ❑ The share of Etsy users who had purchased something during the past three months surged higher during Covid quarters. The data regressed after that and fell back within normal ranges and seasonality that we typically observe.

## NEW AND RECENTLY ADDED QUESTIONS

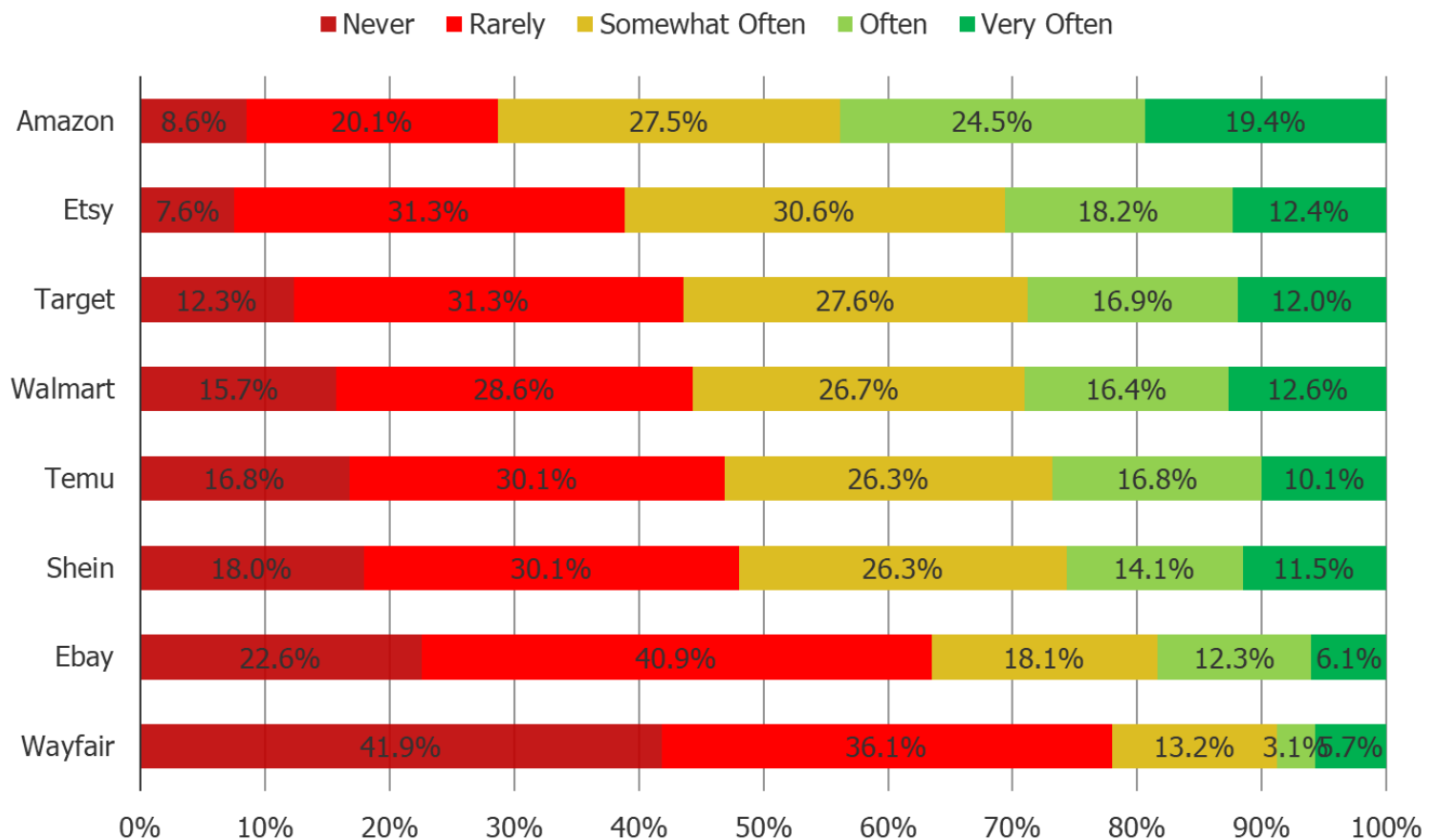
WHEN YOU SHOP ONLINE, HOW DO YOU THINK ABOUT THE TRADEOFF BETWEEN PRICE AND DELIVERY SPEED?

Posed to all respondents.



HOW OFTEN DO YOU BUY GIFTS FOR OTHERS THROUGH THIS PLATFORM?

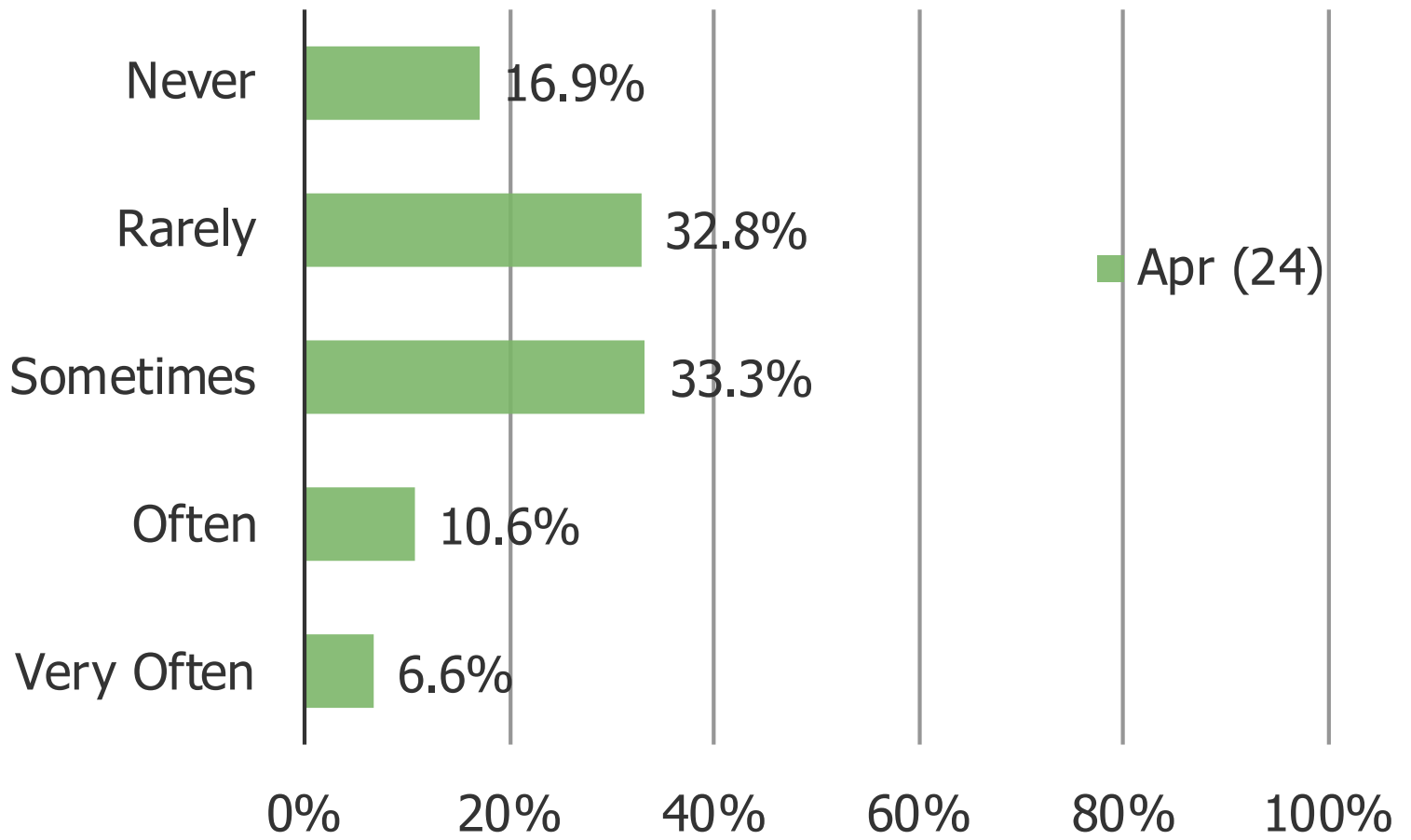
Posed to all respondents who shop the following regularly or occasionally.



	N =
Wayfair	227
Ebay	430
Shein	156
Temu	209
Walmart	720
Target	569
Etsy	291
Amazon	924

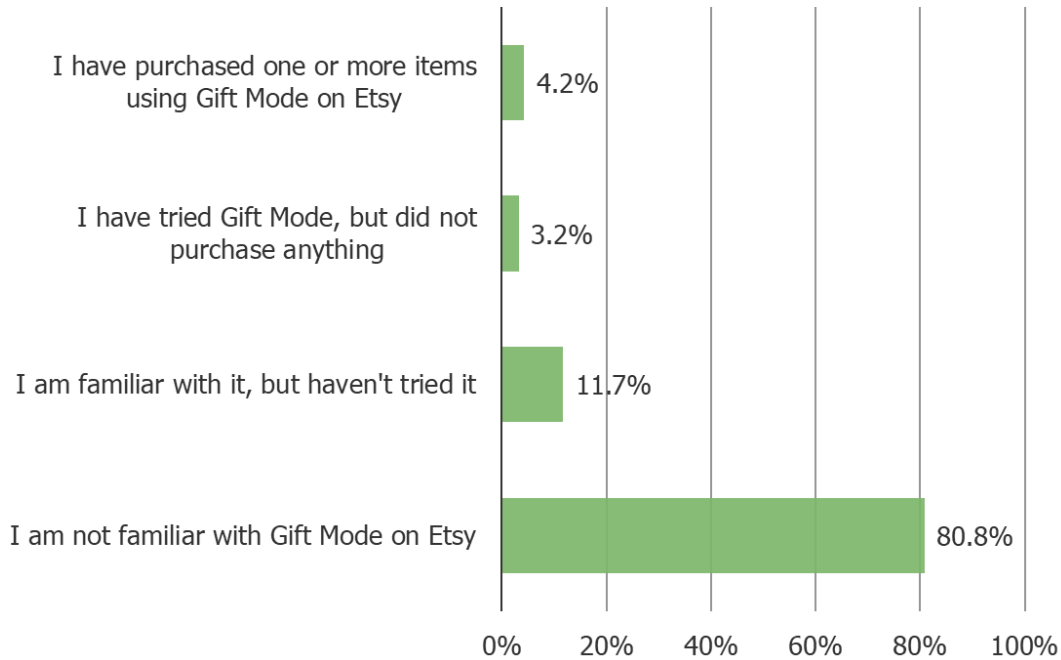
HOW OFTEN DO YOU USE ETSY TO BUY GIFTS FOR OTHERS?

Posed to all respondents who have shopped Etsy.

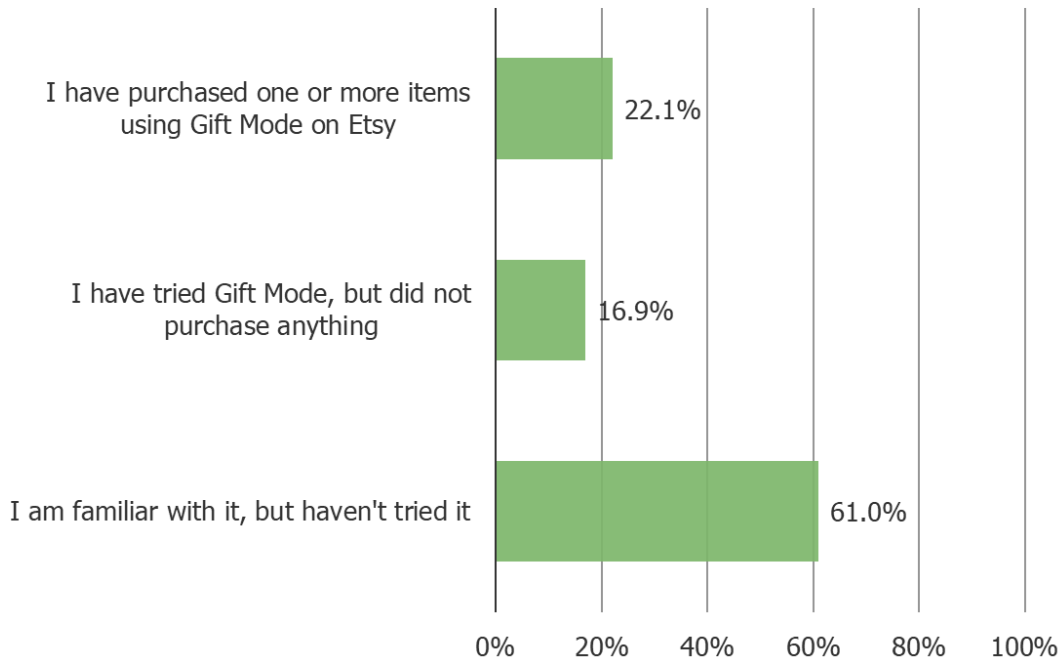


HAVE YOU TRIED GIFT MODE ON ETSY?

Posed to all respondents who have shopped Etsy.

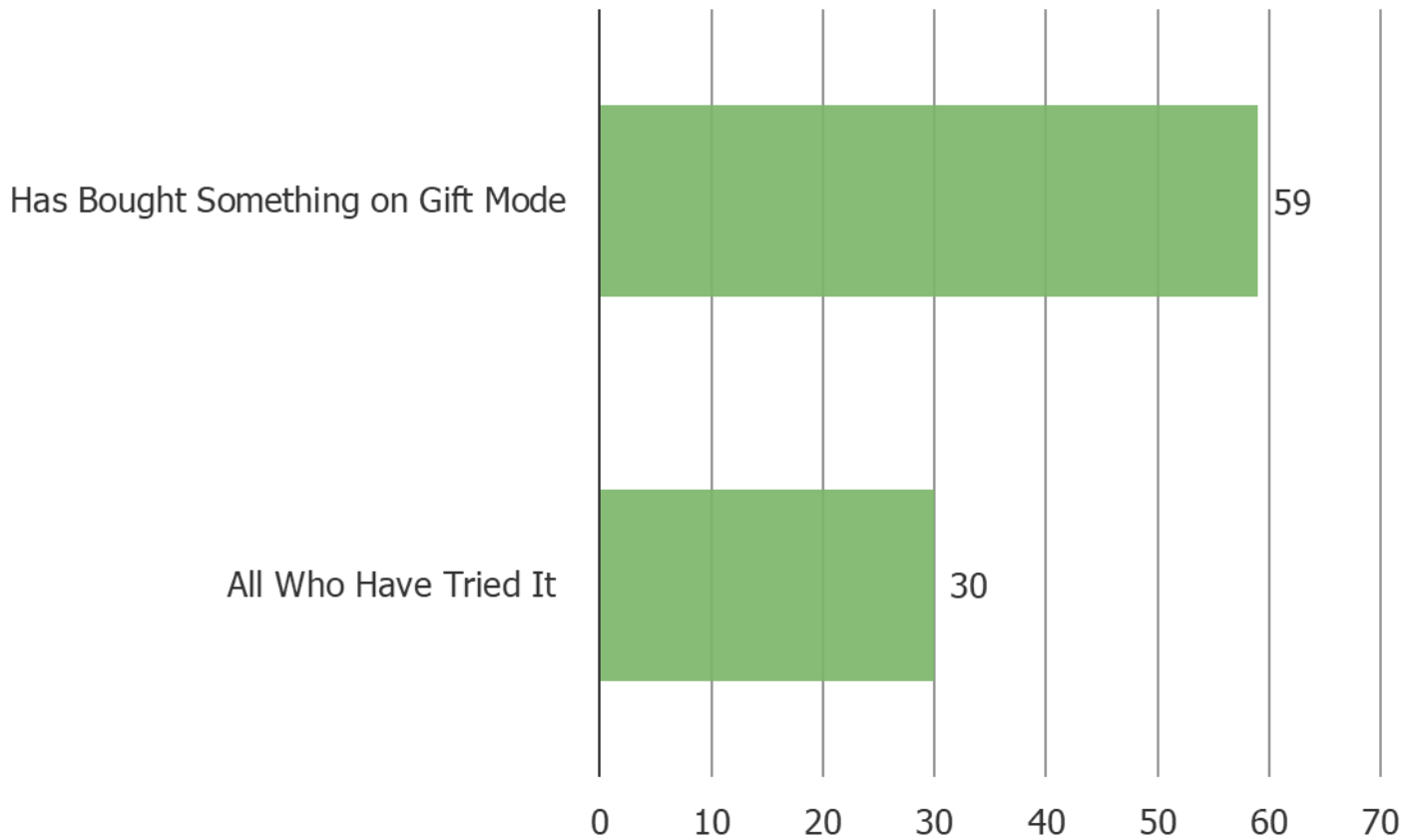


Posed to all respondents who have shopped Etsy (factoring out people who aren't aware of Gift Mode on Etsy).



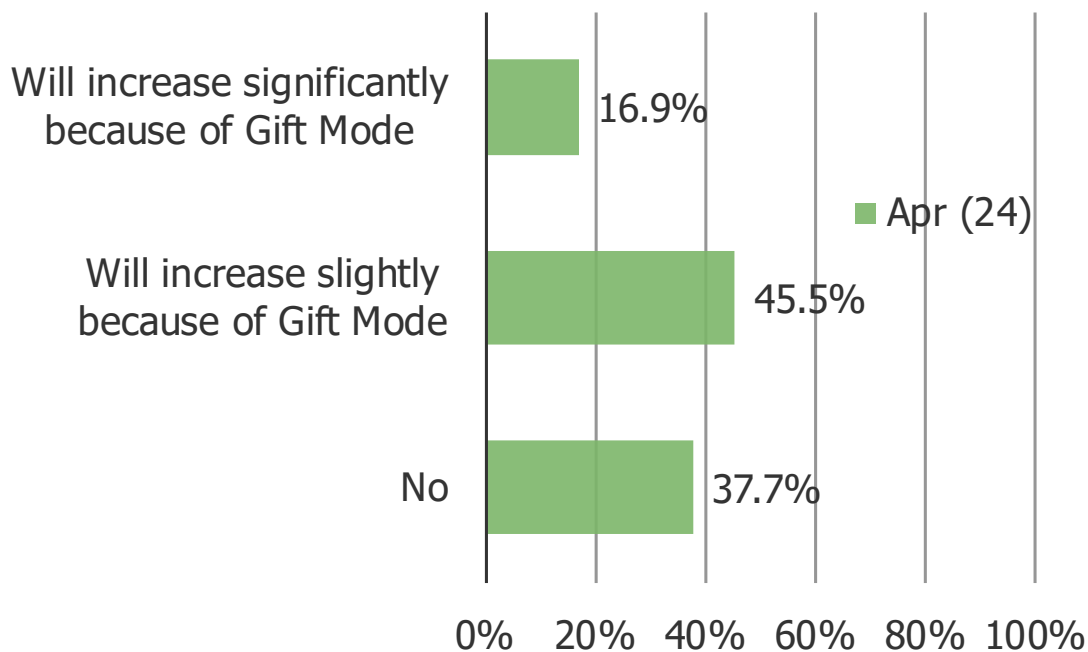
HOW LIKELY IS IT THAT YOU WOULD RECOMMEND GIFT MODE ON ETSY TO A FRIEND OR COLLEAGUE?

Posed to all respondents who are at least familiar with Gift Mode on Etsy. (N=77)

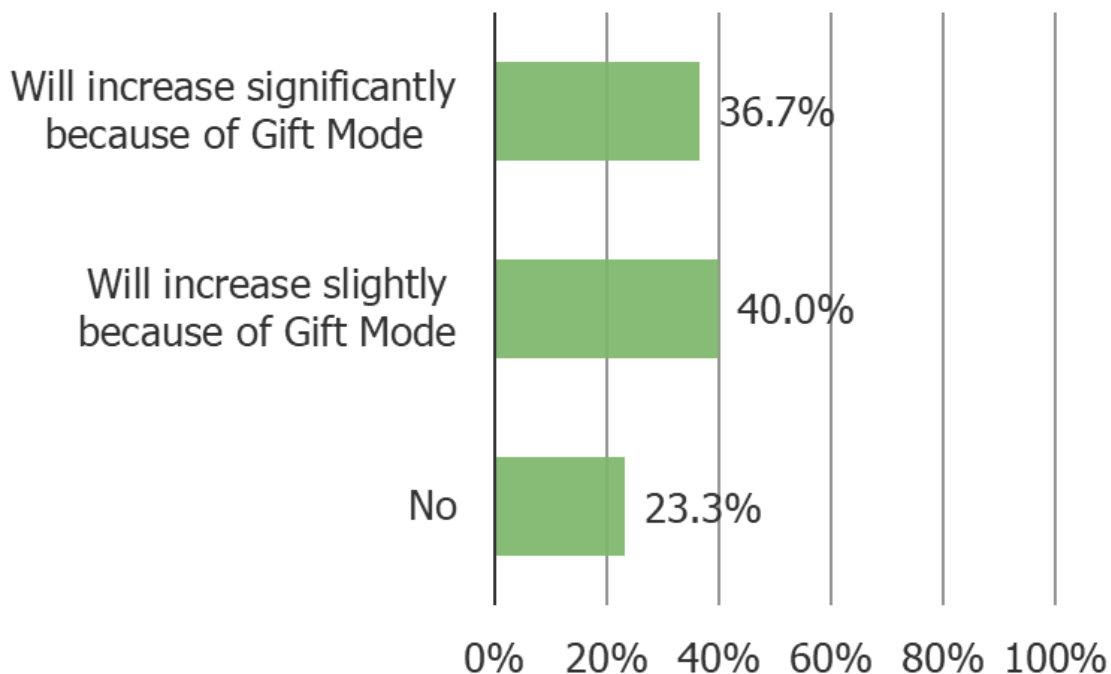


DO YOU THINK YOU WILL INCREASE THE SHARE OF YOUR GIFT GIVING THAT YOU BUY THROUGH ETSY BECAUSE OF THE GIFT MODE FEATURE?

Posed to all respondents who are at least familiar with Gift Mode on Etsy (N = 77).



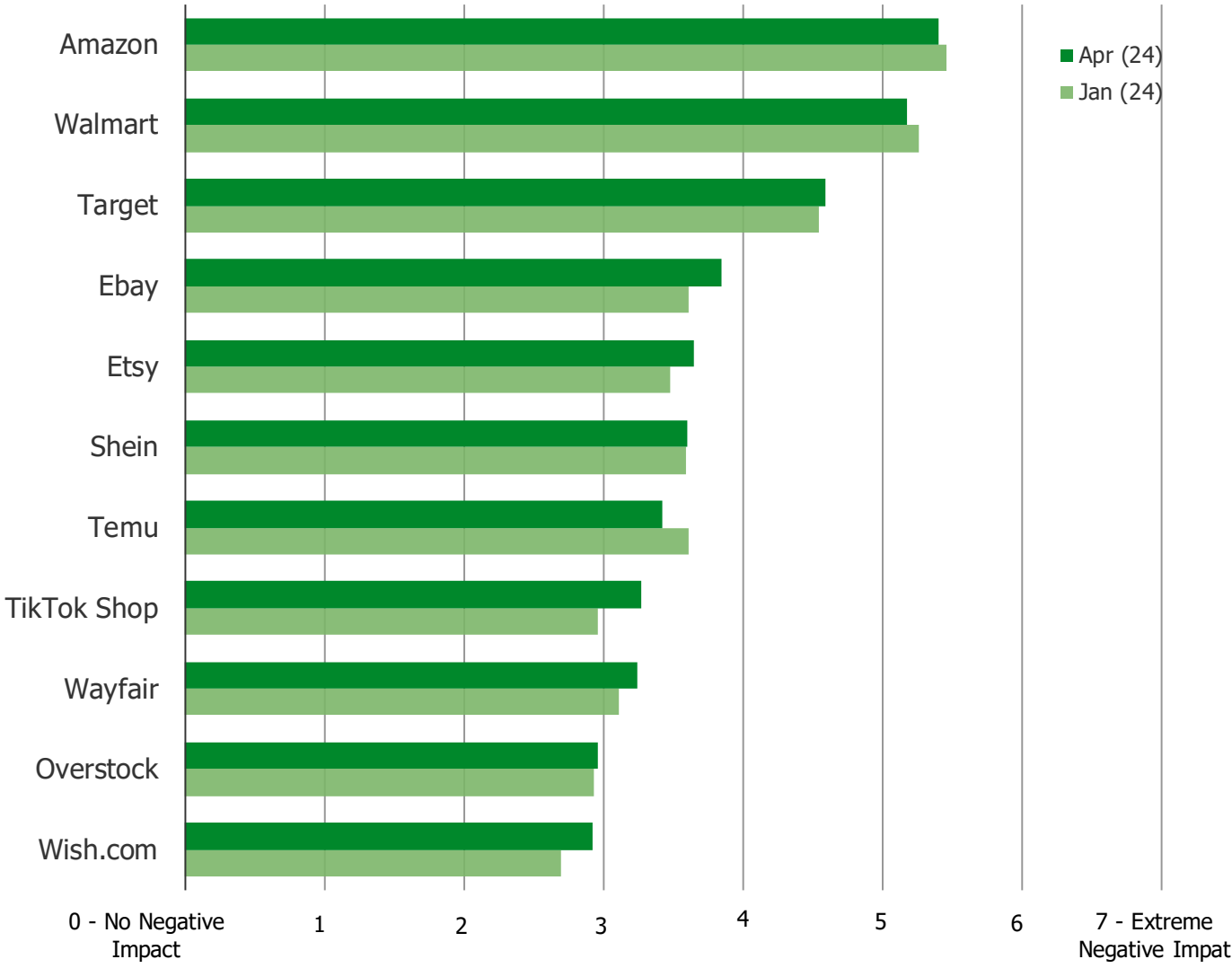
Posed to all respondents who have browsed or purchased something on Gift Mode (N = 30).





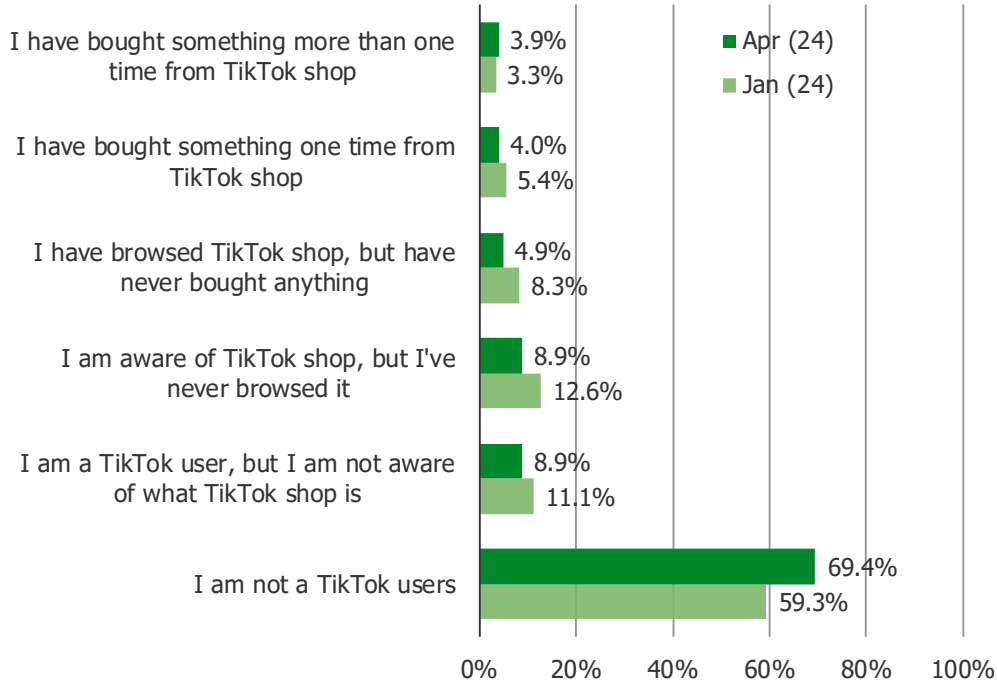
WOULD IT IMPACT YOUR LIFE IF THE FOLLOWING WENT OUT OF EXISTENCE TODAY?

Posed to all respondents who have shopped each of the following at least once...

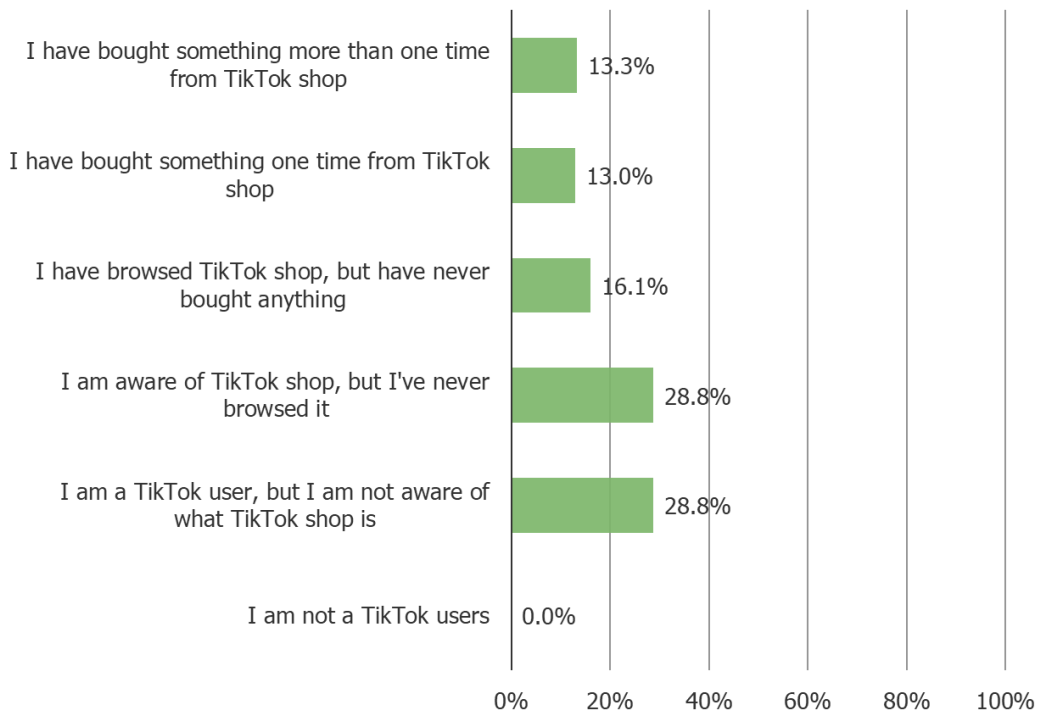


WHAT IS YOUR EXPERIENCE WITH TIKTOK SHOP?

Posed to all respondents.

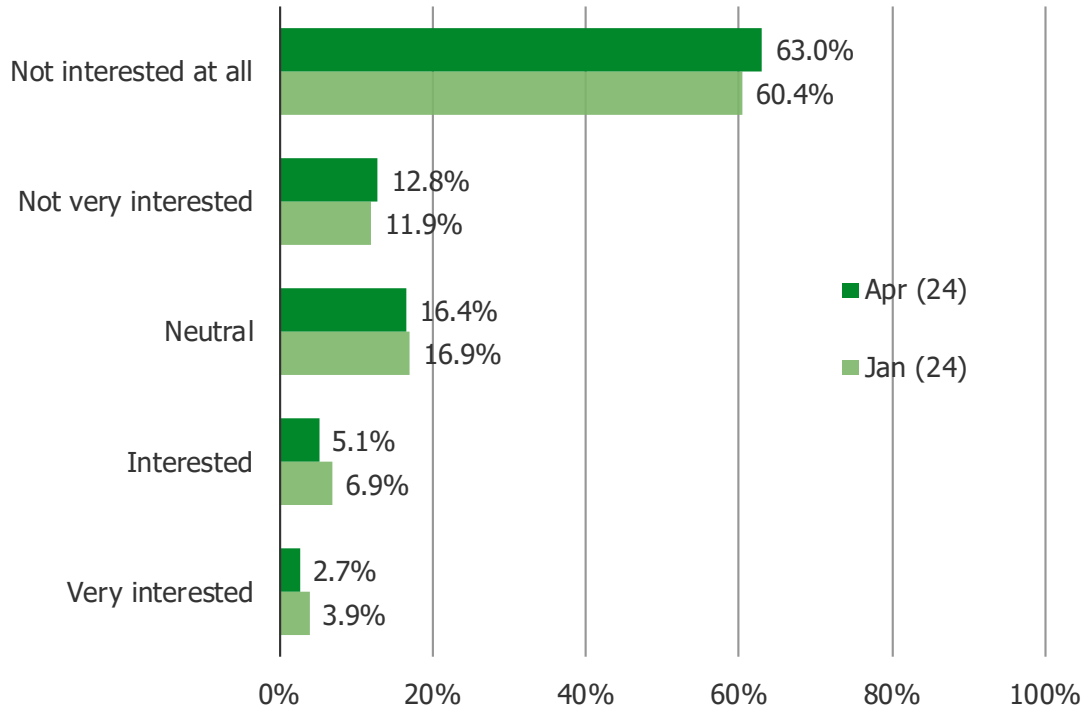


Focusing on TikTok users... (N = 323)

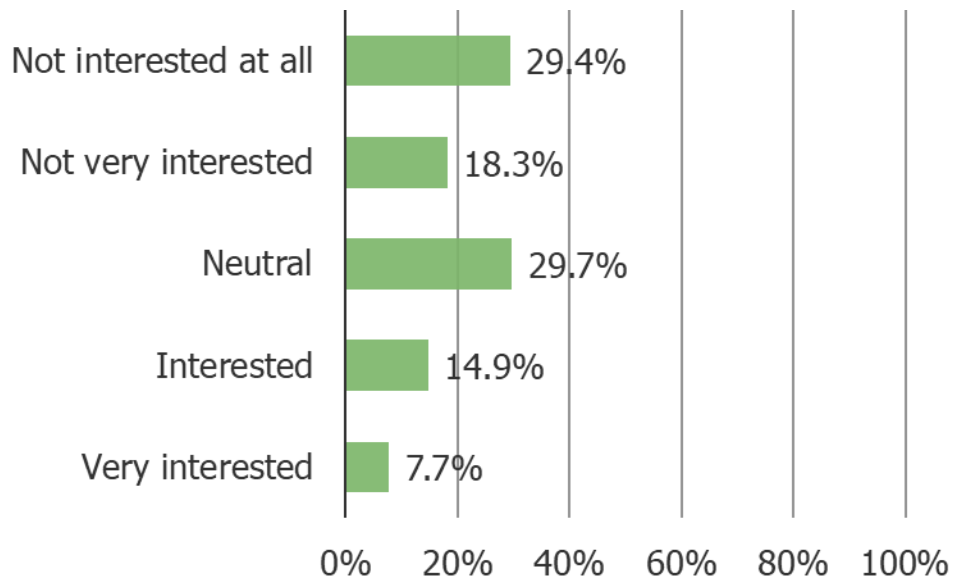


HOW MUCH INTEREST DO YOU HAVE IN BUYING THINGS FROM TIKTOK SHOP?

Posed to all respondents.

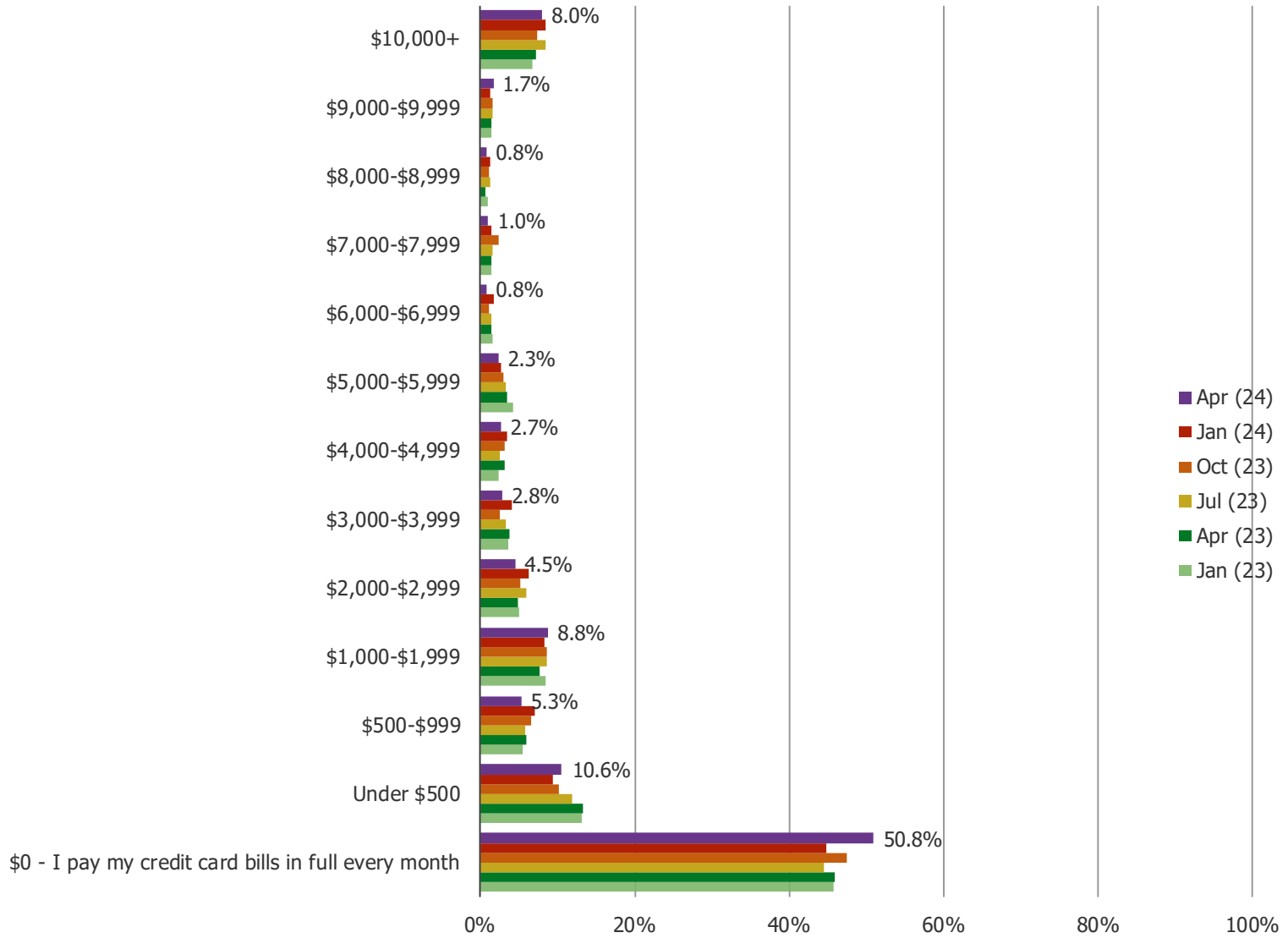


Focusing on TikTok users... (N = 323)



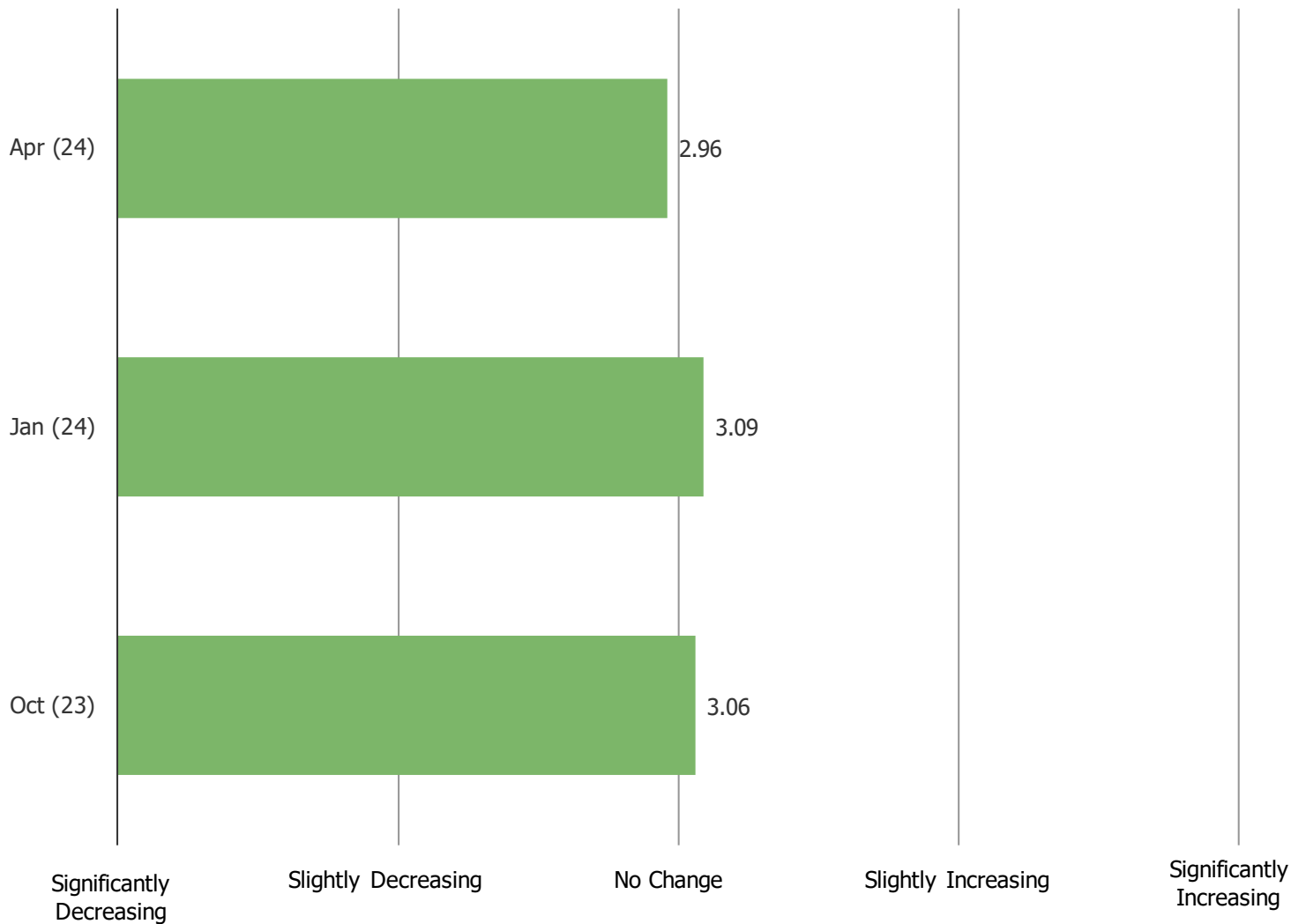
HOW MUCH CREDIT CARD DEBT DO YOU HAVE? IE – HOW MUCH OF AN OUTSTANDING BALANCE DO YOU CARRY OVER FROM MONTH TO MONTH?

Posed to all respondents.



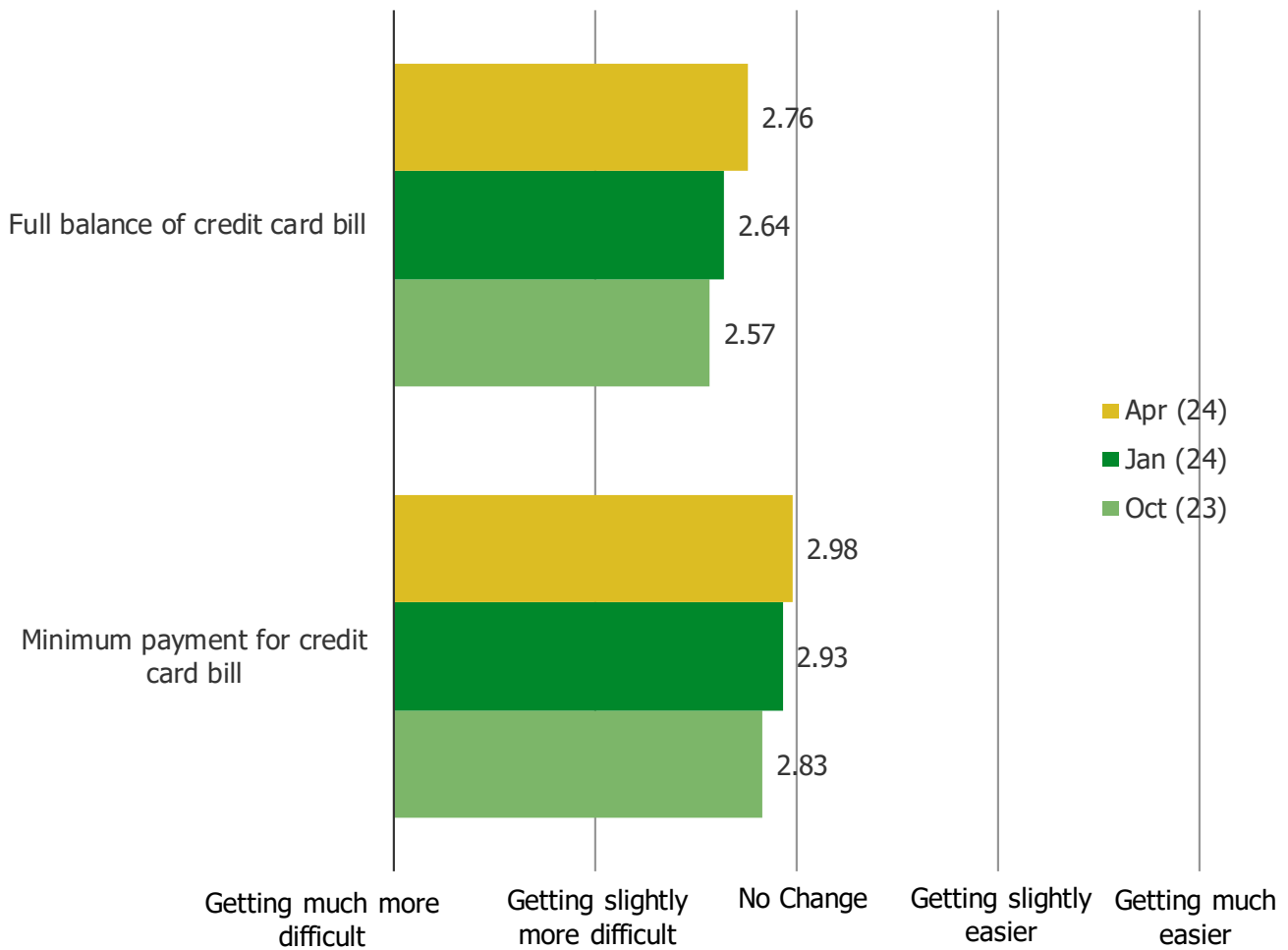
HAS THE AMOUNT OF CREDIT CARD DEBT THAT YOU HAVE BEEN INCREASING OR DECREASING OVER THE PAST 12 MONTHS?

Posed to all respondents.



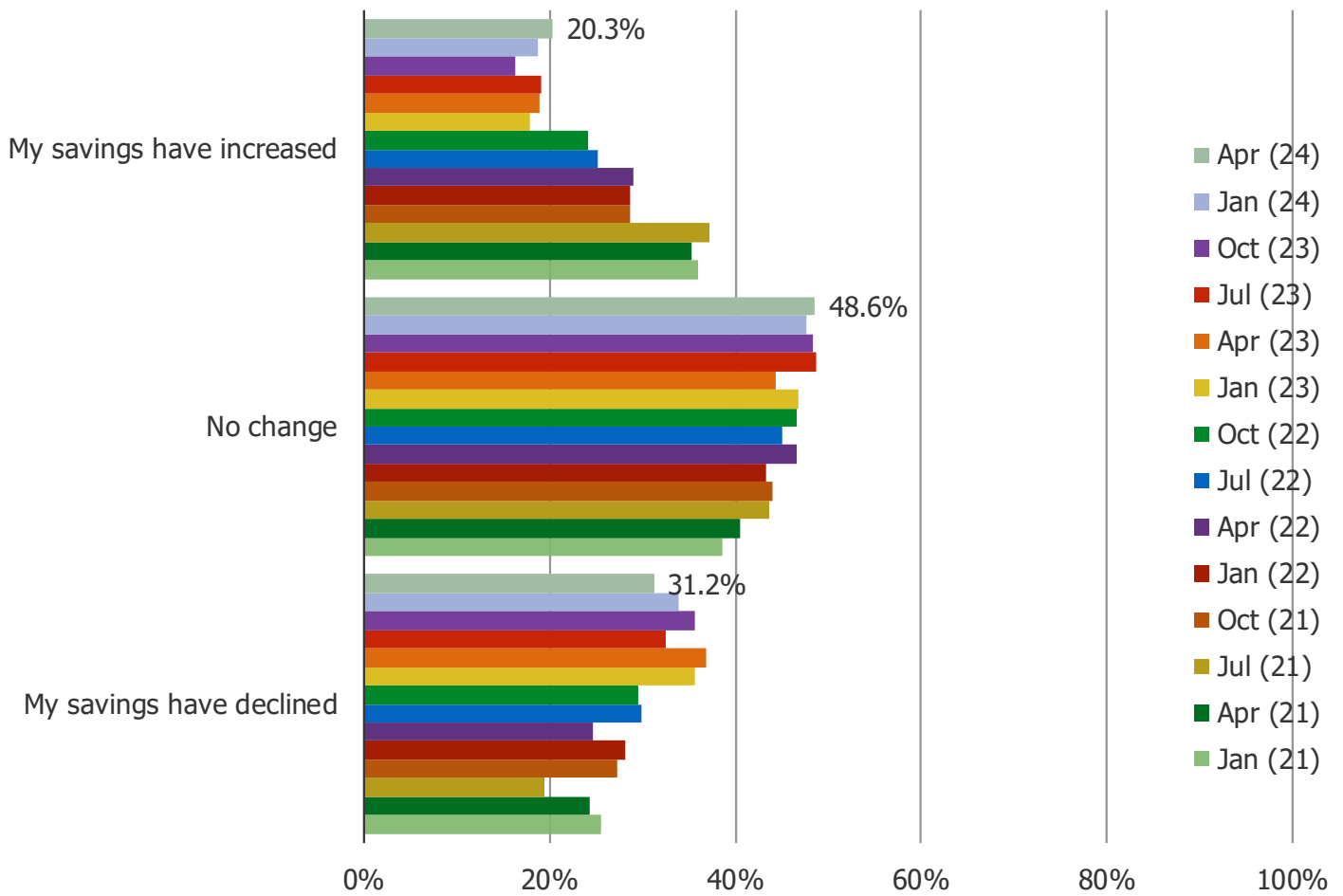
IS IT GETTING EASIER OR MORE DIFFICULT TO PAY THE FOLLOWING EACH MONTH...

Posed to all respondents.



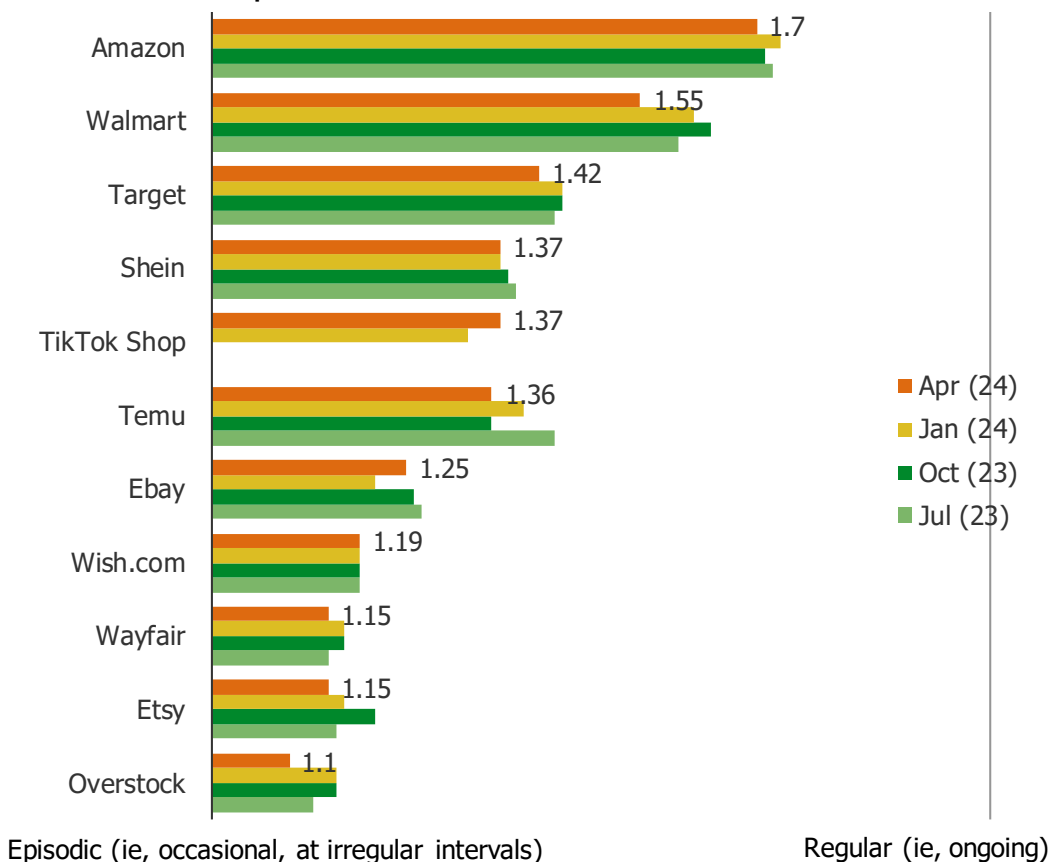
TO THE BEST OF YOUR ESTIMATION, DID THE AMOUNT OF MONEY YOU HAVE SAVED CHANGE SINCE THE START OF THE COVID-19 PANDEMIC?

Posed to all respondents.

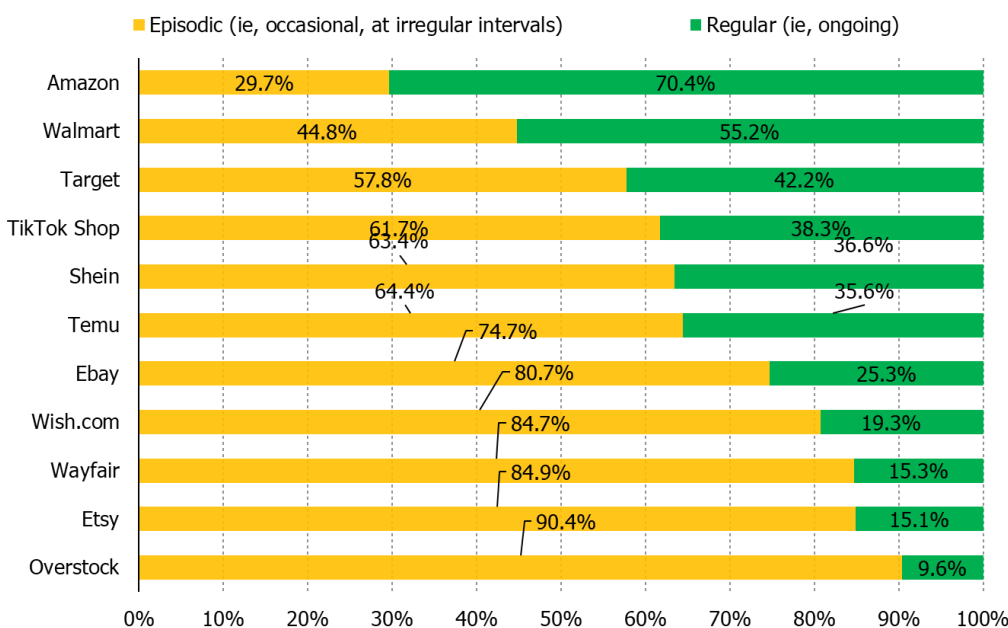


WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.



April 2024 Breakout





















YOU MENTIONED YOUR SHOPPING OF THIS PLATFORM IS MORE EPISODIC (IE, OCCASIONAL, AT IRREGULAR INTERVALS). CAN YOU GIVE US AN EXAMPLE OF AN OCCASION OR NEED THAT WOULD PROMPT YOU TO SHOP THIS PLATFORM?

Posed to all respondents who shop the below and their use is more episodic than regular.

Wish.com



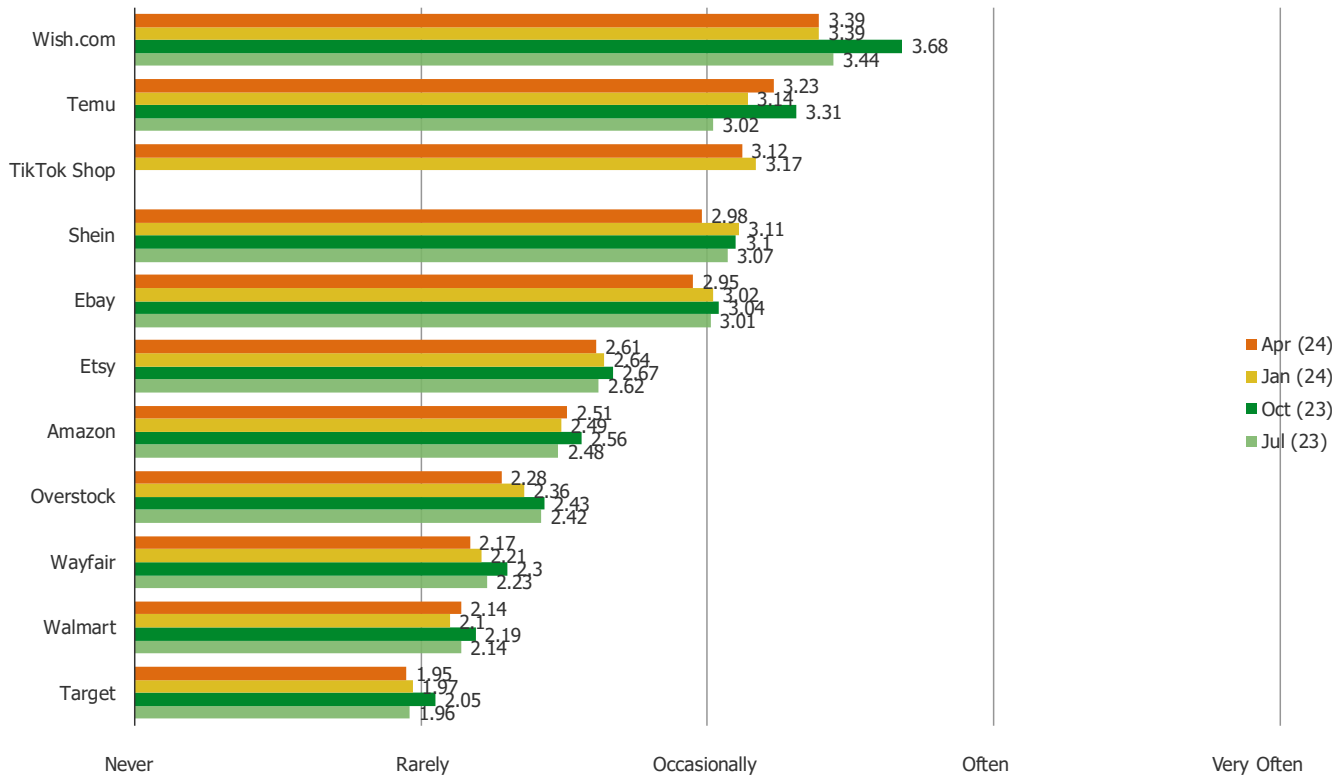




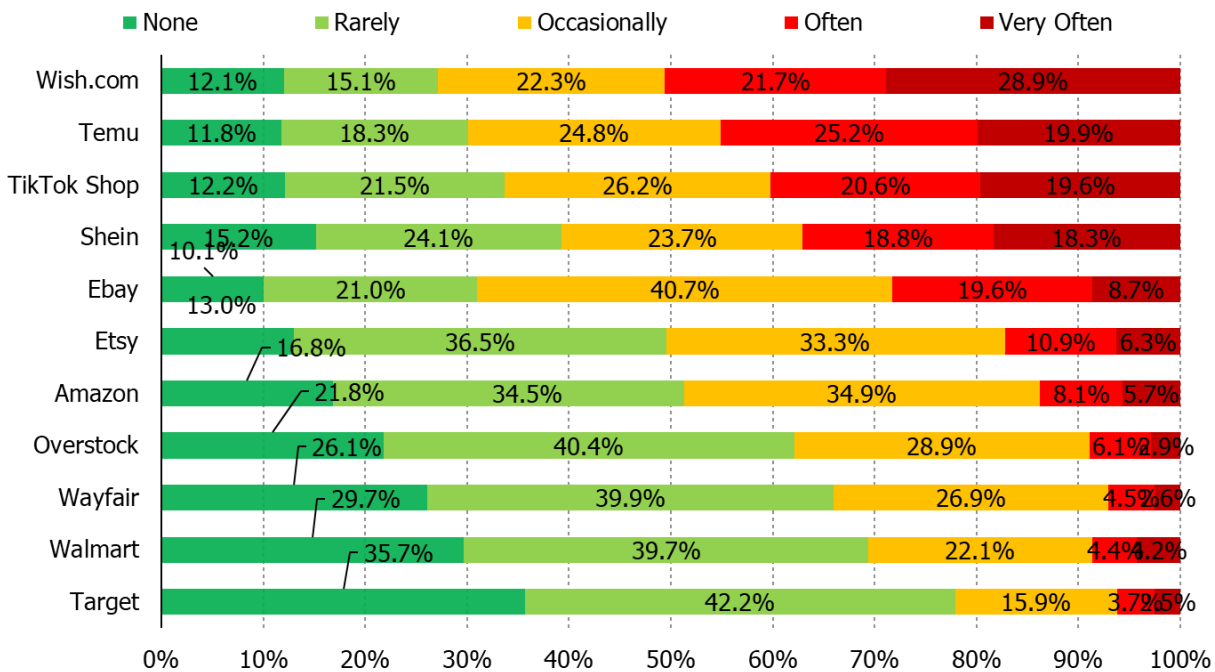


HOW OFTEN DO YOU THINK THERE ARE COUNTERFEIT / FAKE ITEMS BEING SOLD ON THIS PLATFORM?

Posed to all respondents who shop the below.

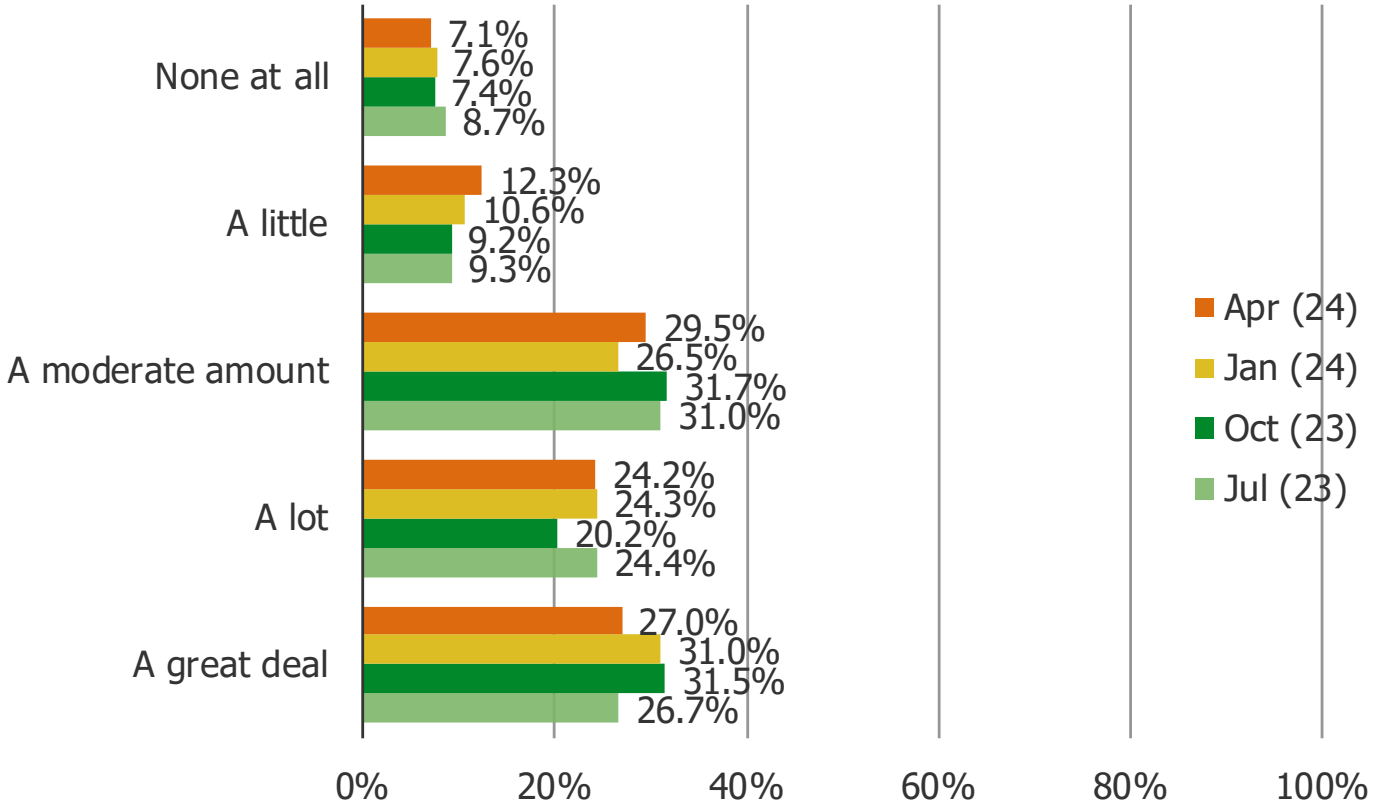


April 2024 Breakout



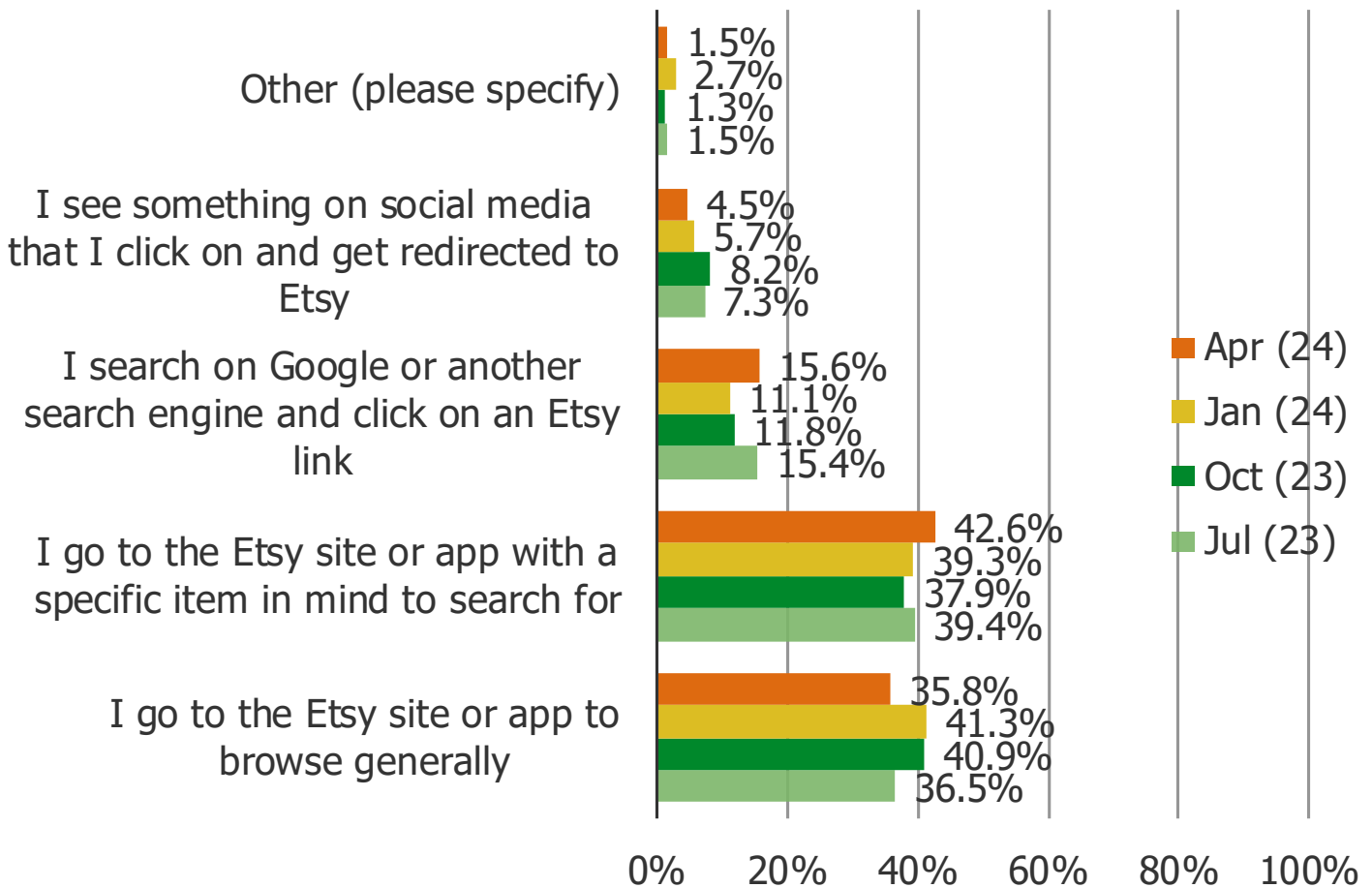
WHEN YOU SHOP ETSY, HOW MUCH DOES IT MATTER TO YOU THAT YOU ARE SUPPORTING SMALL BUSINESSES AND MAKING A POSITIVE IMPACT WITH YOUR PURCHASES?

Posed to all respondents who shop Etsy.



HOW DO YOU MOST COMMONLY FIND YOURSELF SHOPPING ON ETSY?

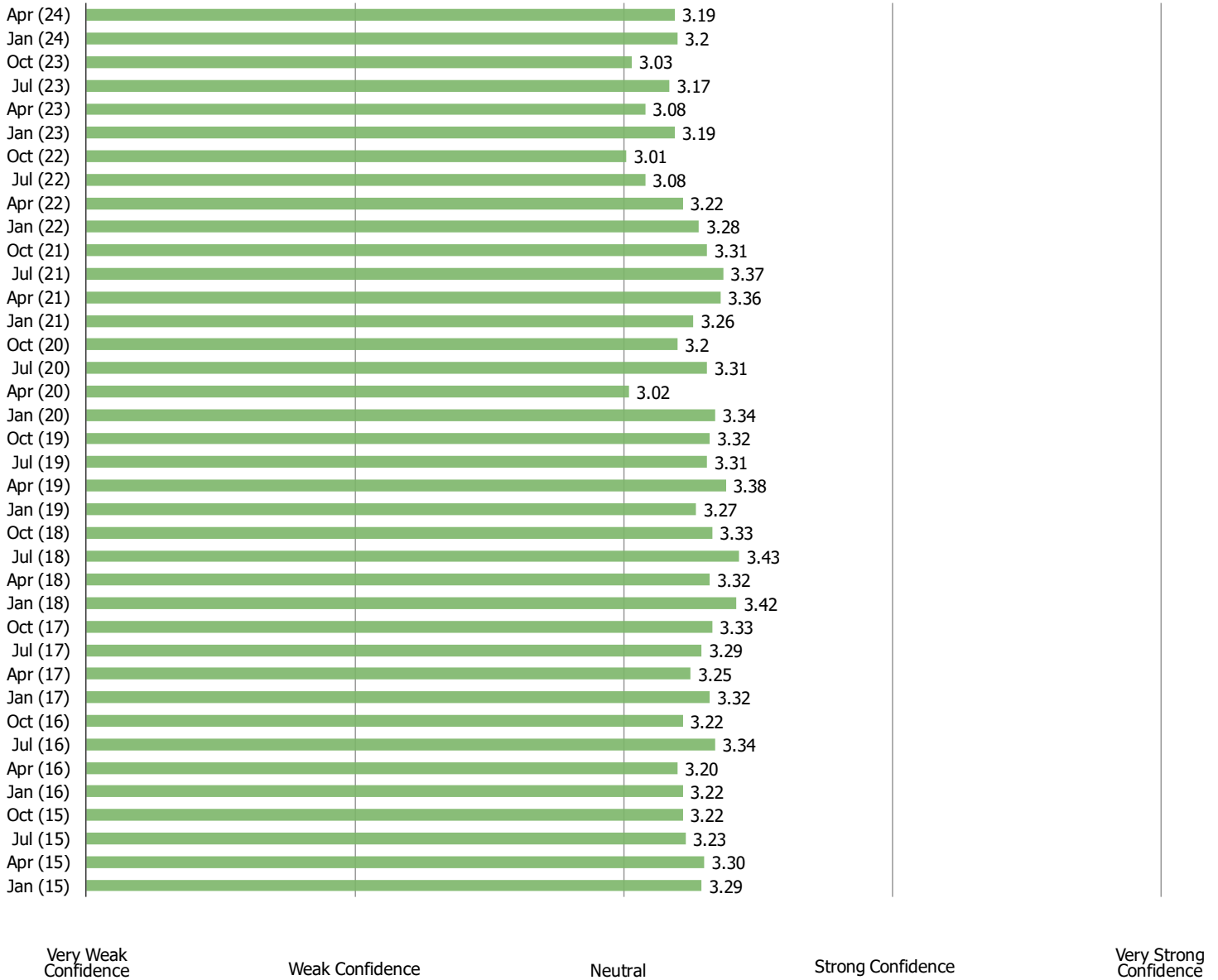
Posed to all respondents who shop Etsy.



# OVERALL SHOPPING TRENDS

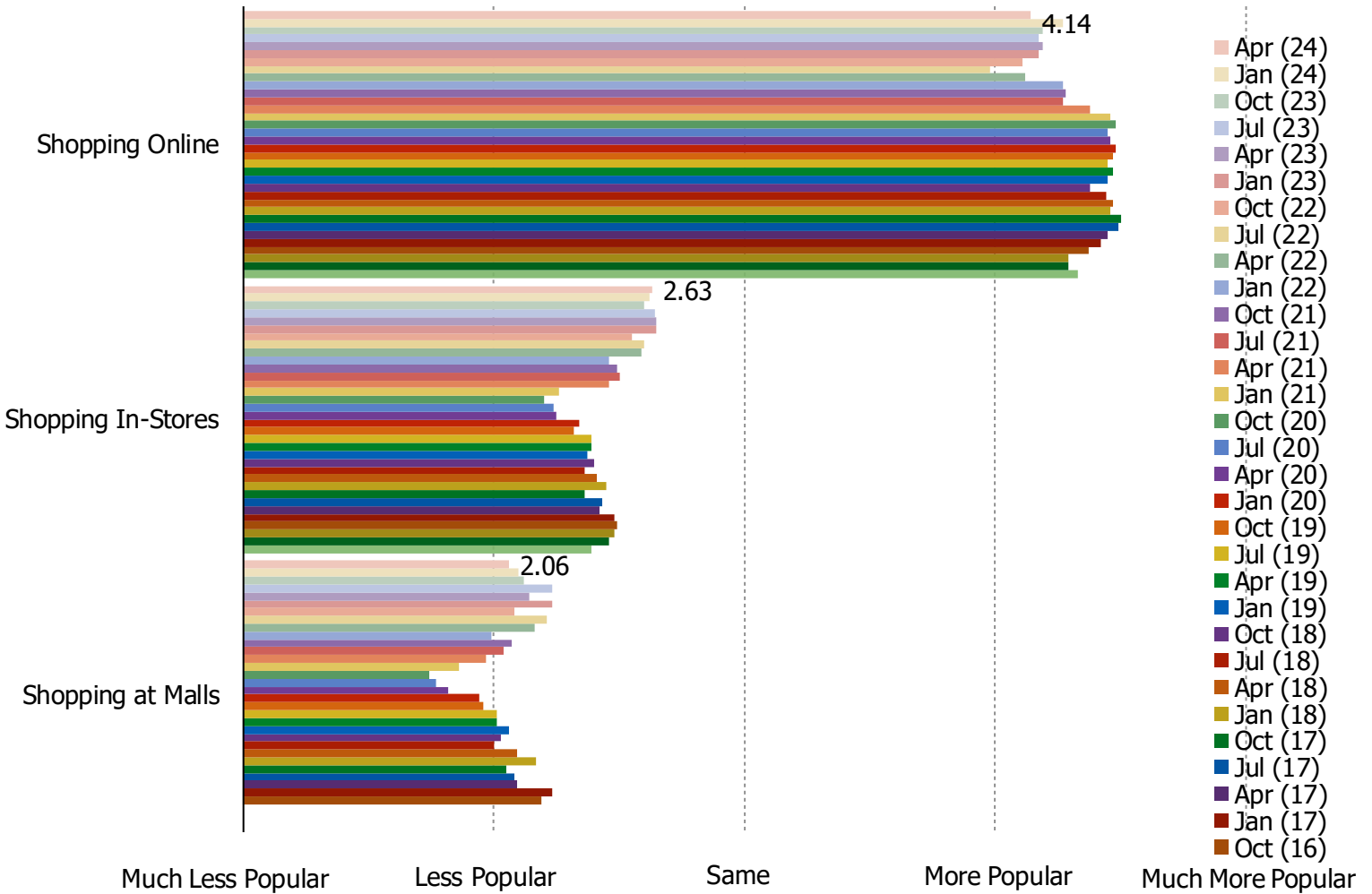
HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



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

Posed to all respondents

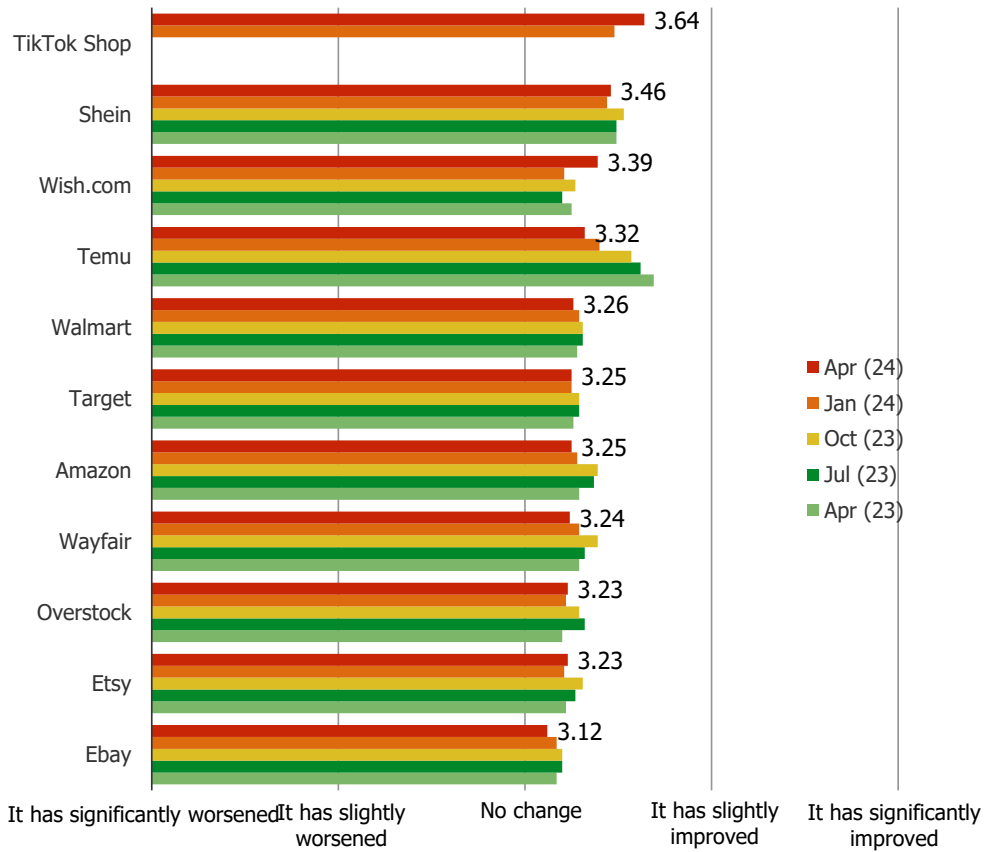




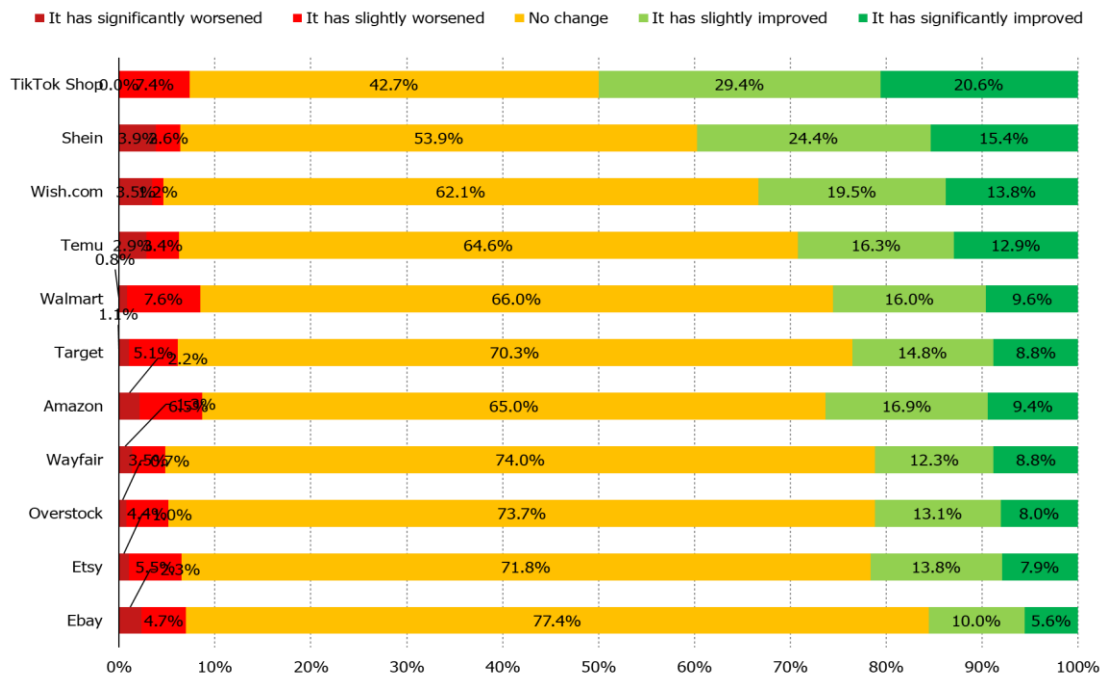
# SALES AND TRUST

HAVE YOU NOTICED ANY CHANGES TO HOW GOOD THE SALES / PROMOTIONAL OFFERS ARE ON THESE PLATFORMS RECENTLY?

Posed to respondents who are aware of each of the following platforms:

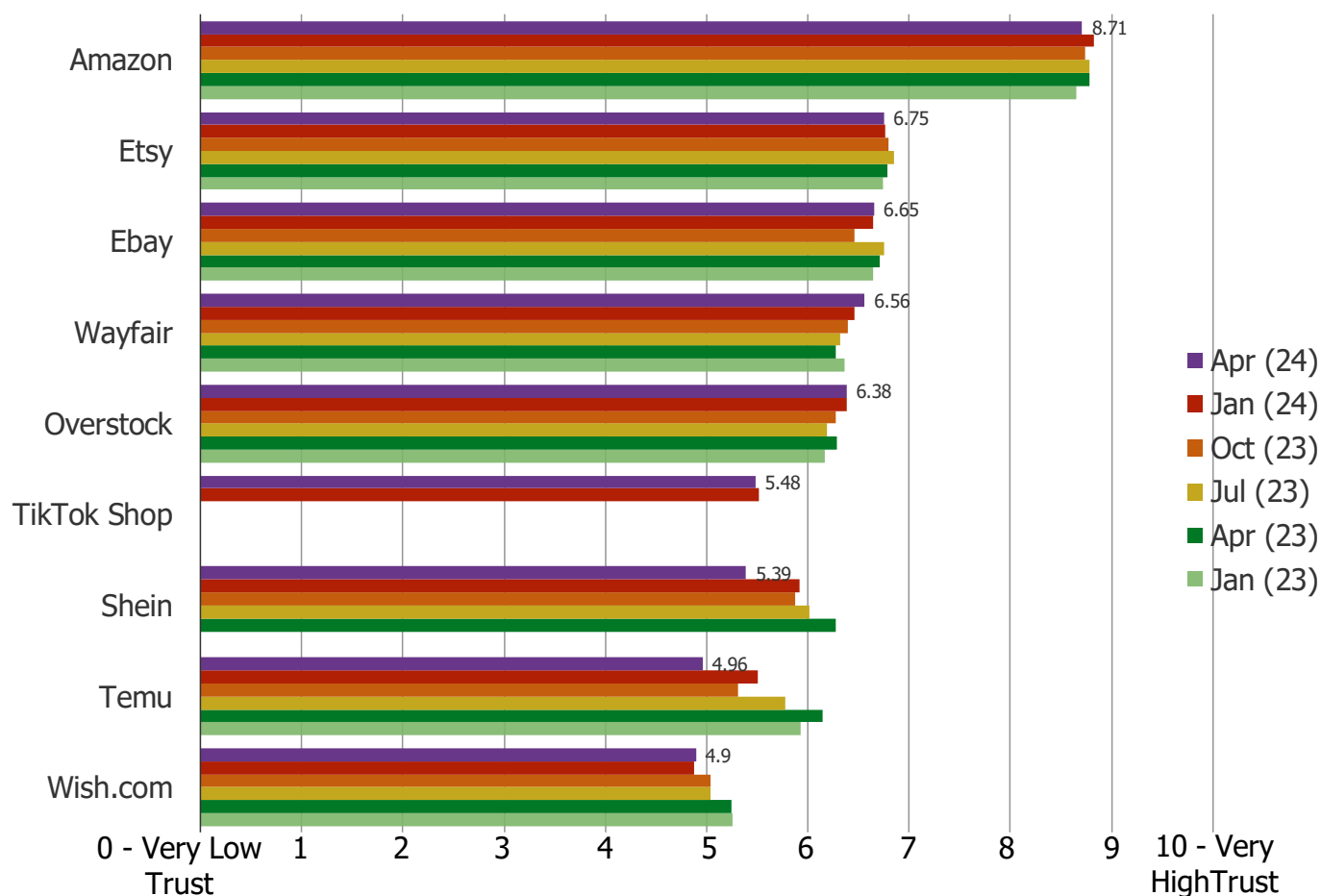


April 2024 Breakout



HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

Posed to respondents who are aware of each of the following platforms:

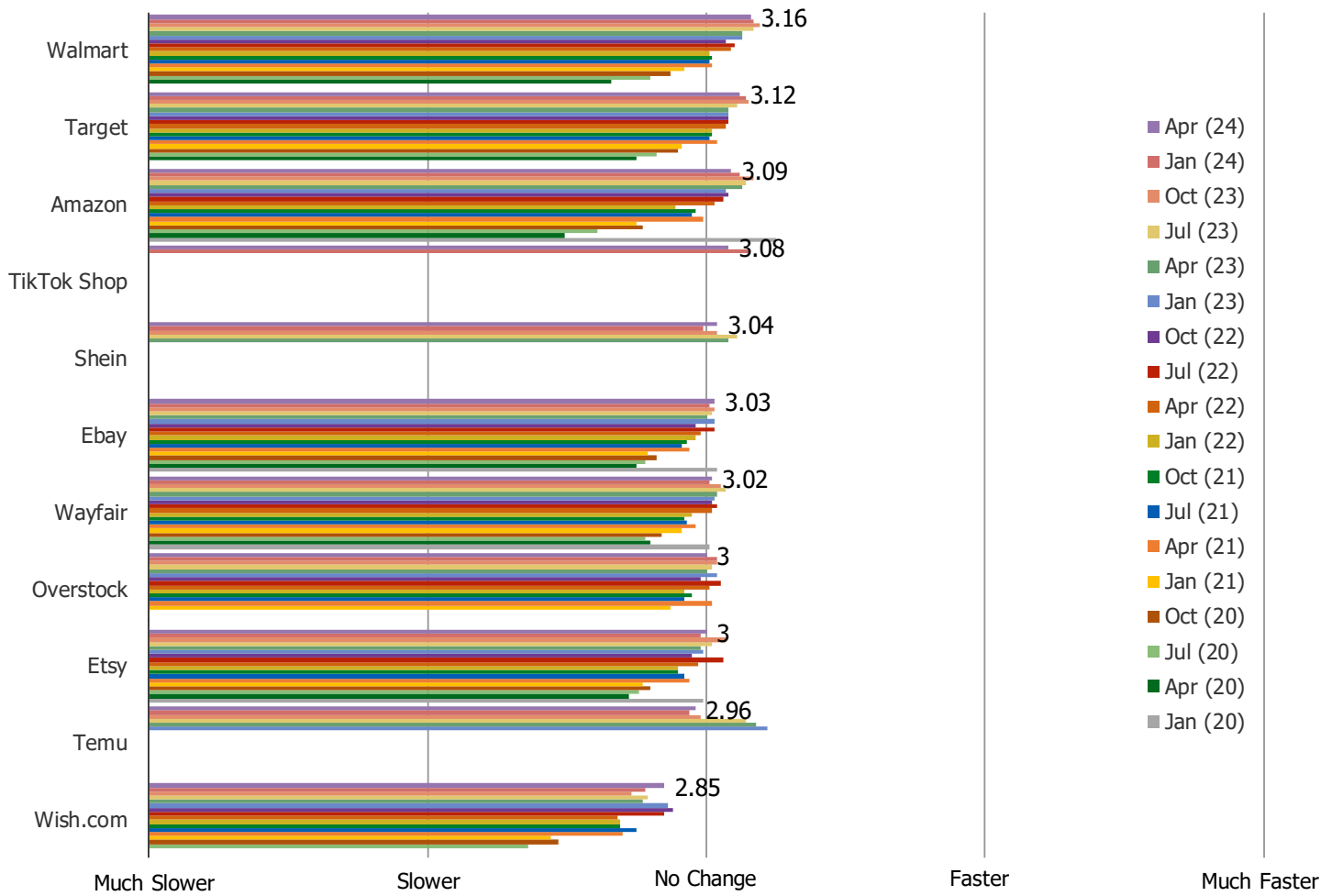


	N=
Etsy	858
Amazon	1003
Ebay	935
TikTok Shop	307
Overstock	728
Wayfair	808
Wish.com	490
Temu	782
Shein	563

# SHIPPING

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

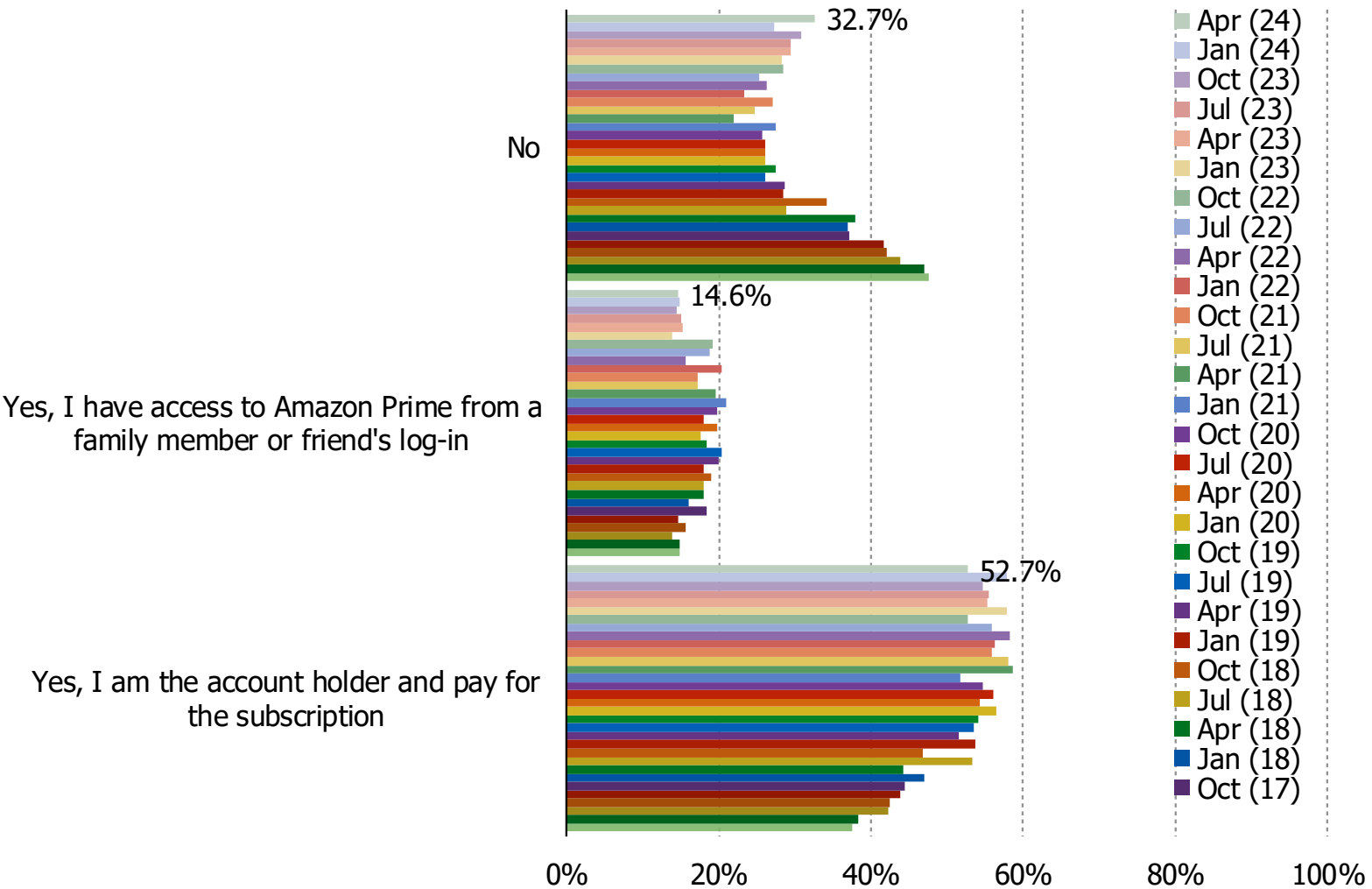
Posed to users of each site/app.



# AMZN PRIME TRENDS

ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

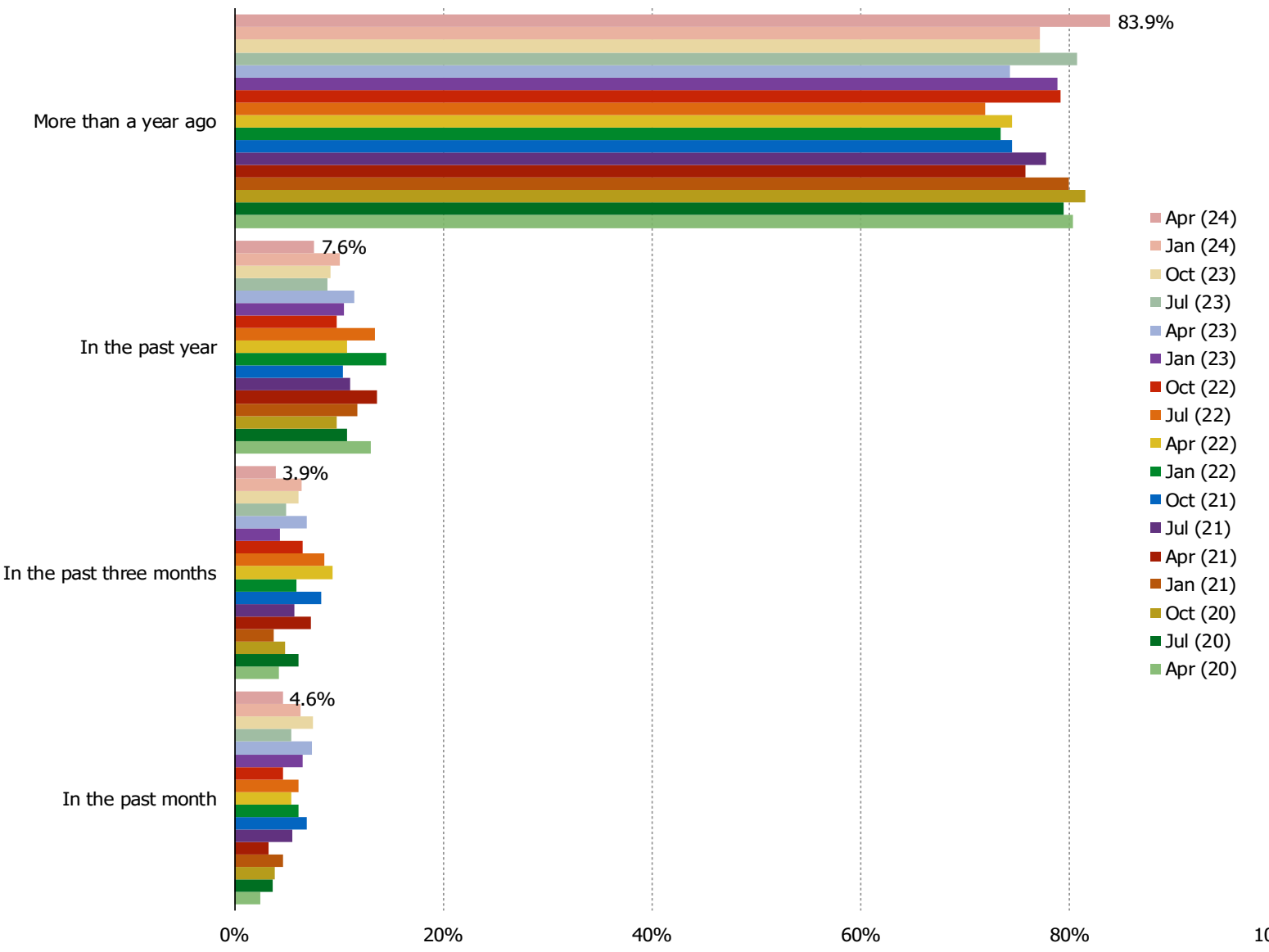
Posed to Amazon users



Top reasons for not subscribing to Prime include cost/price (top reason), not using Amazon enough to justify it, or preferring other options over Amazon.

WHEN DID YOU START YOUR CURRENT AMAZON PRIME MEMBERSHIP?

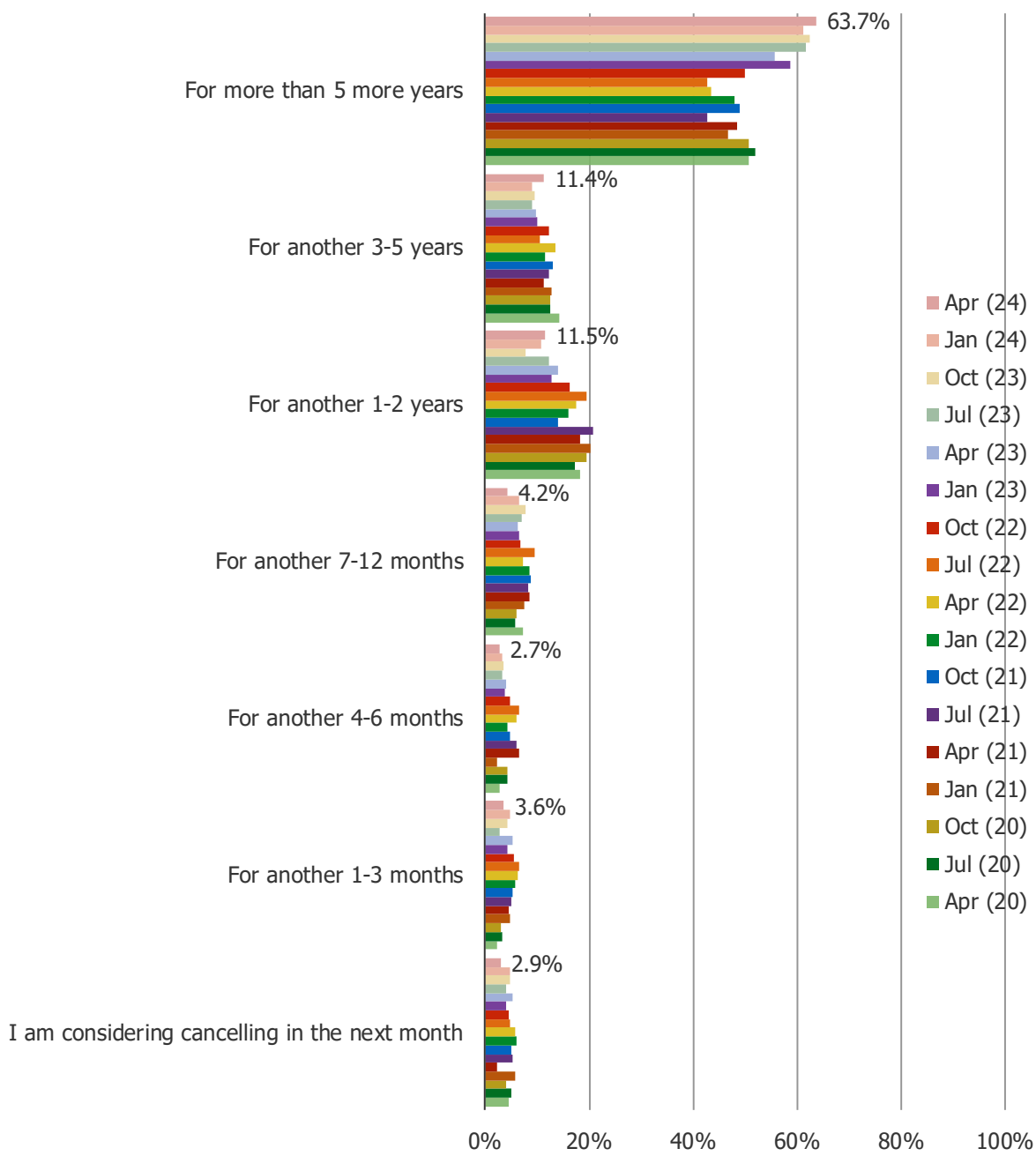
Posed to Amazon users who are Prime members.





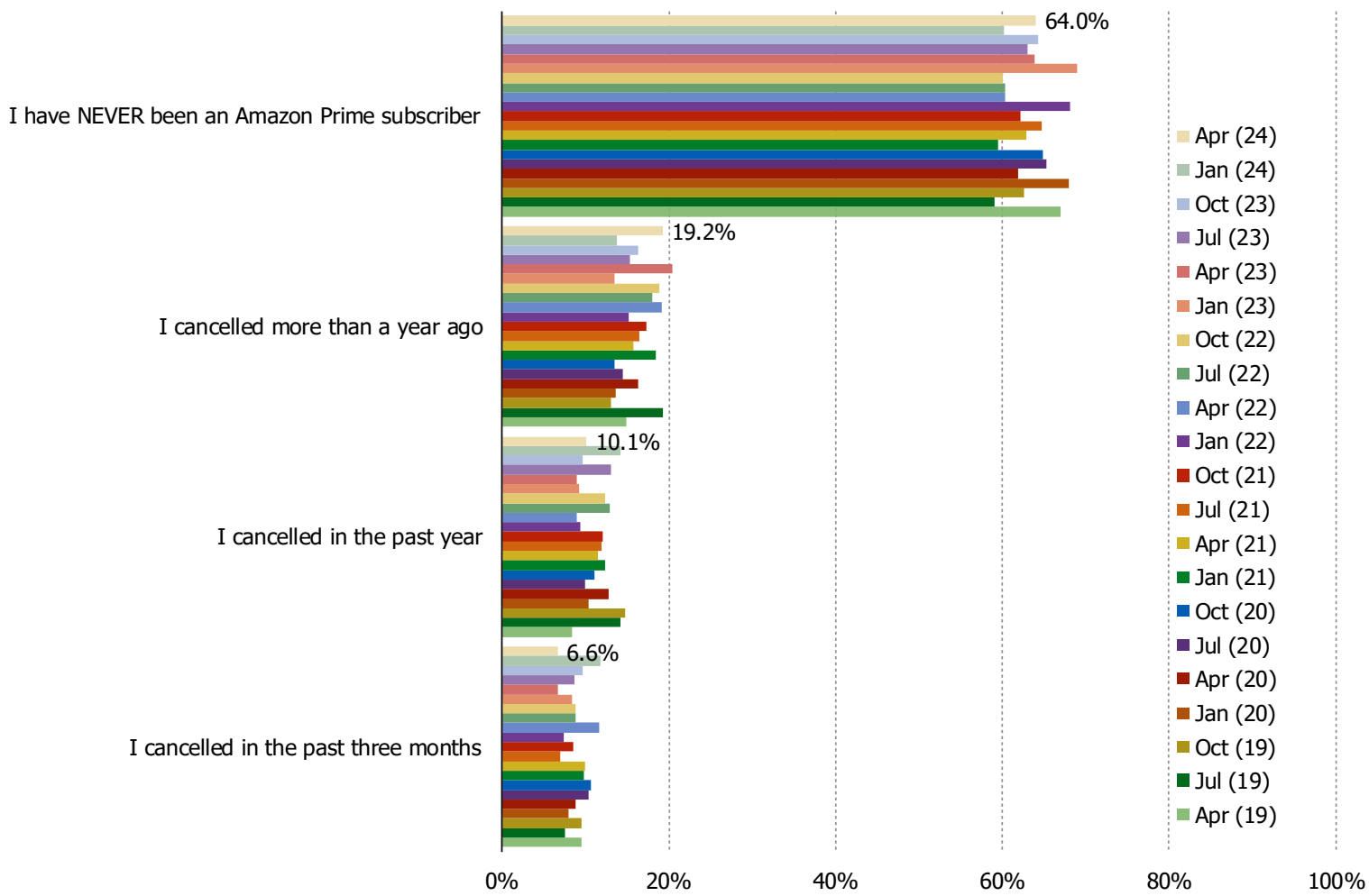
FOR HOW MUCH LONGER DO YOU INTEND TO BE AN AMAZON PRIME MEMBER?

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

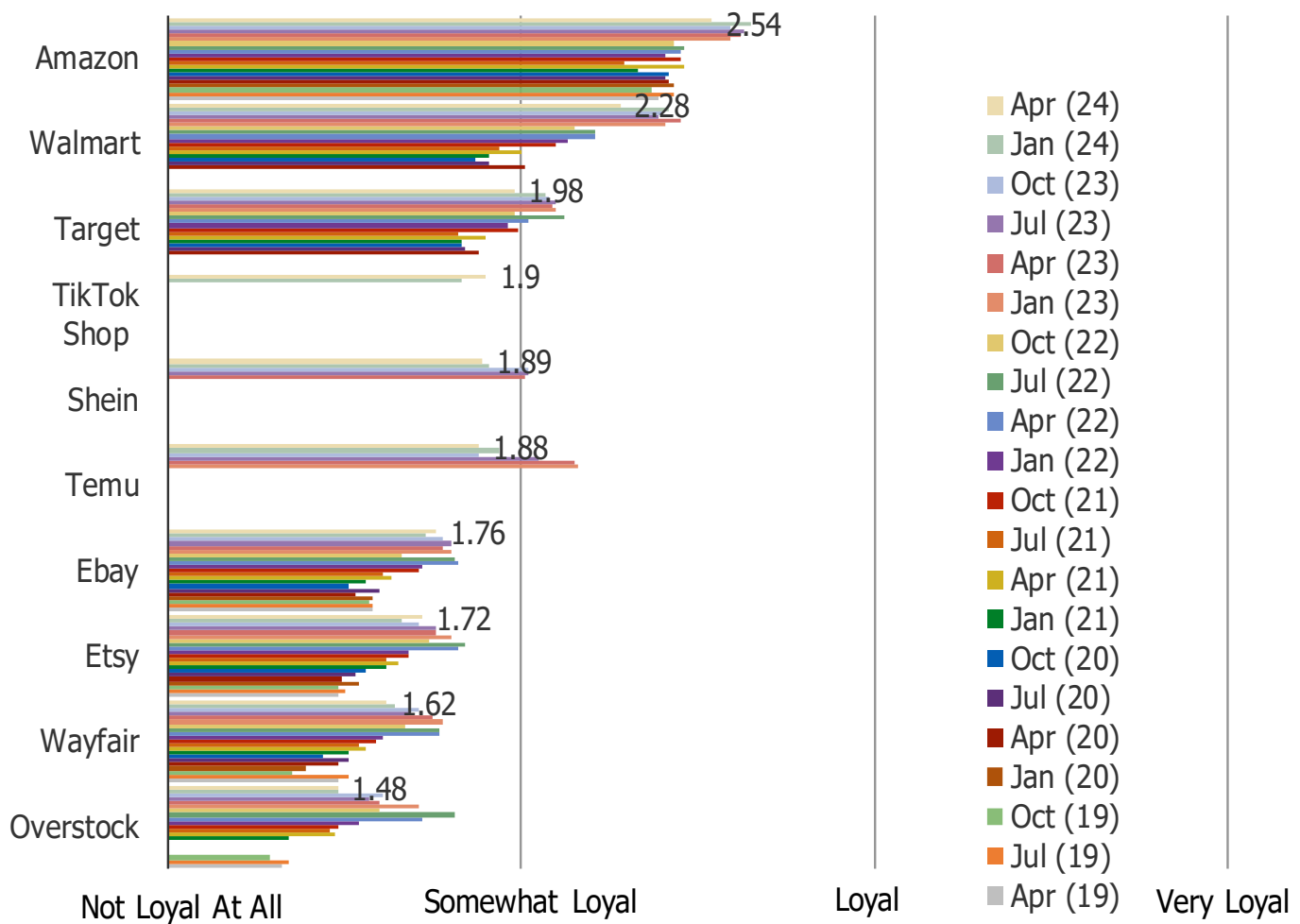


# COMPETITIVE DYNAMICS



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

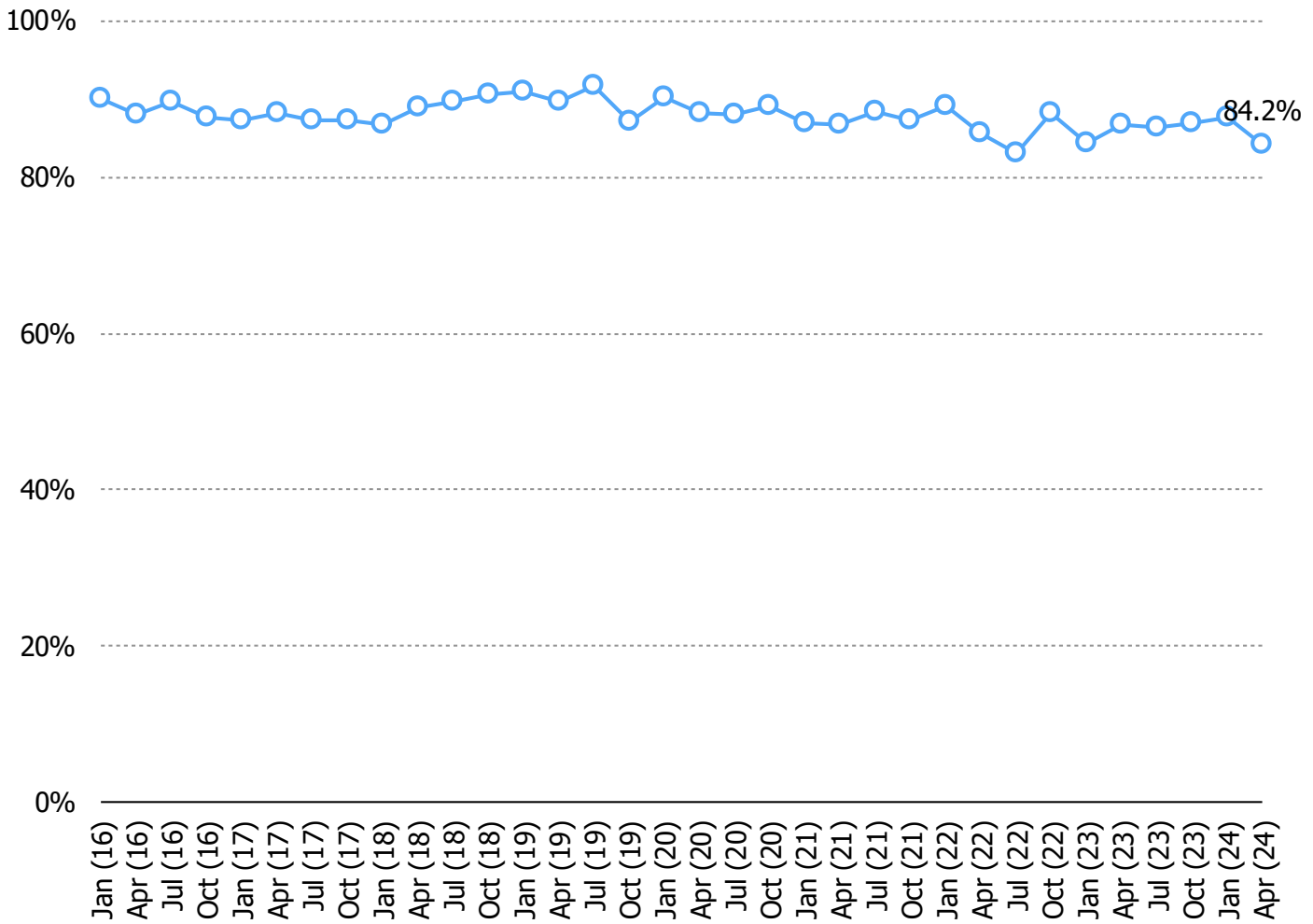
Posed to users of each site/app



# AMZN TRENDS

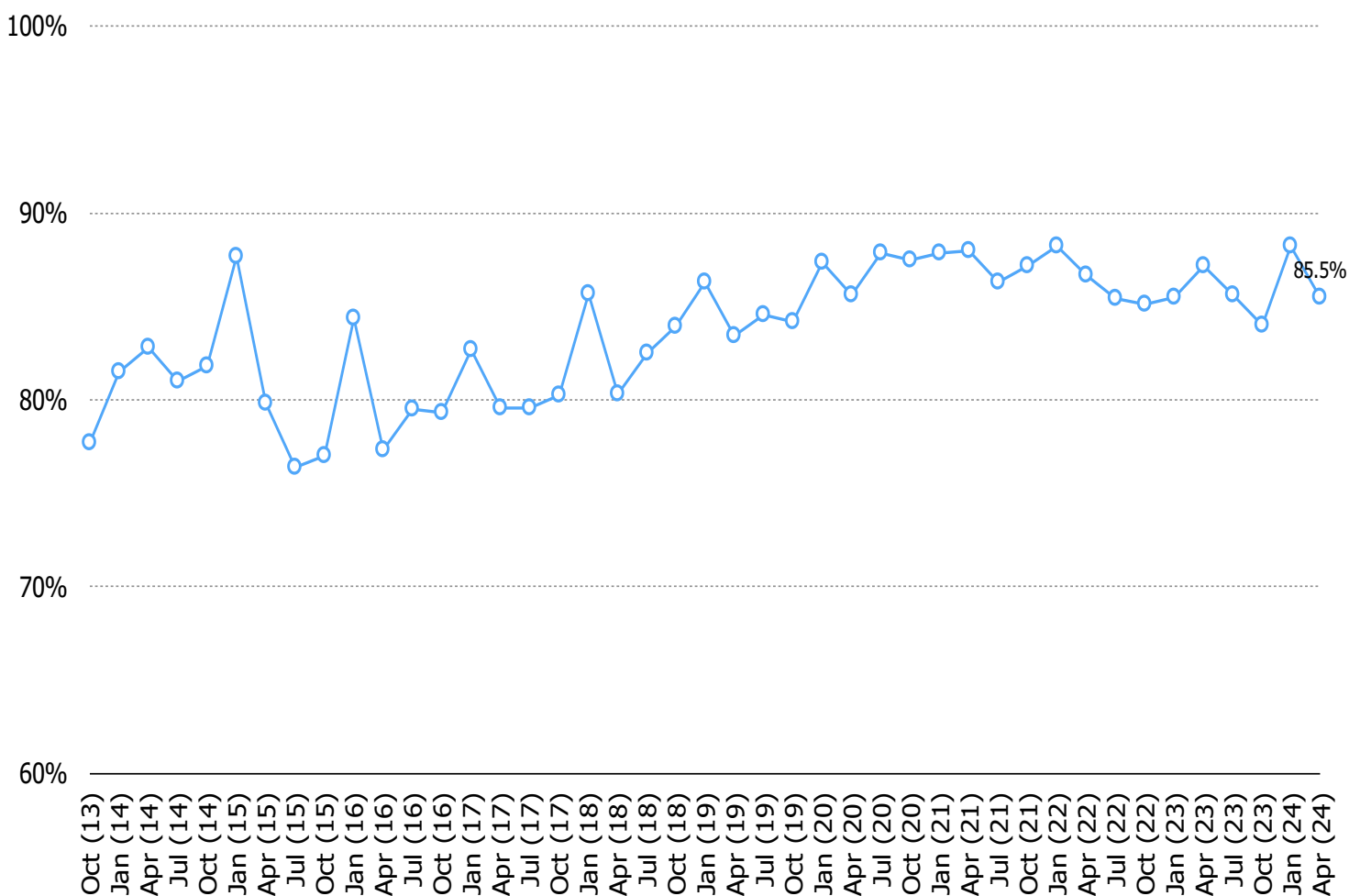
DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.



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

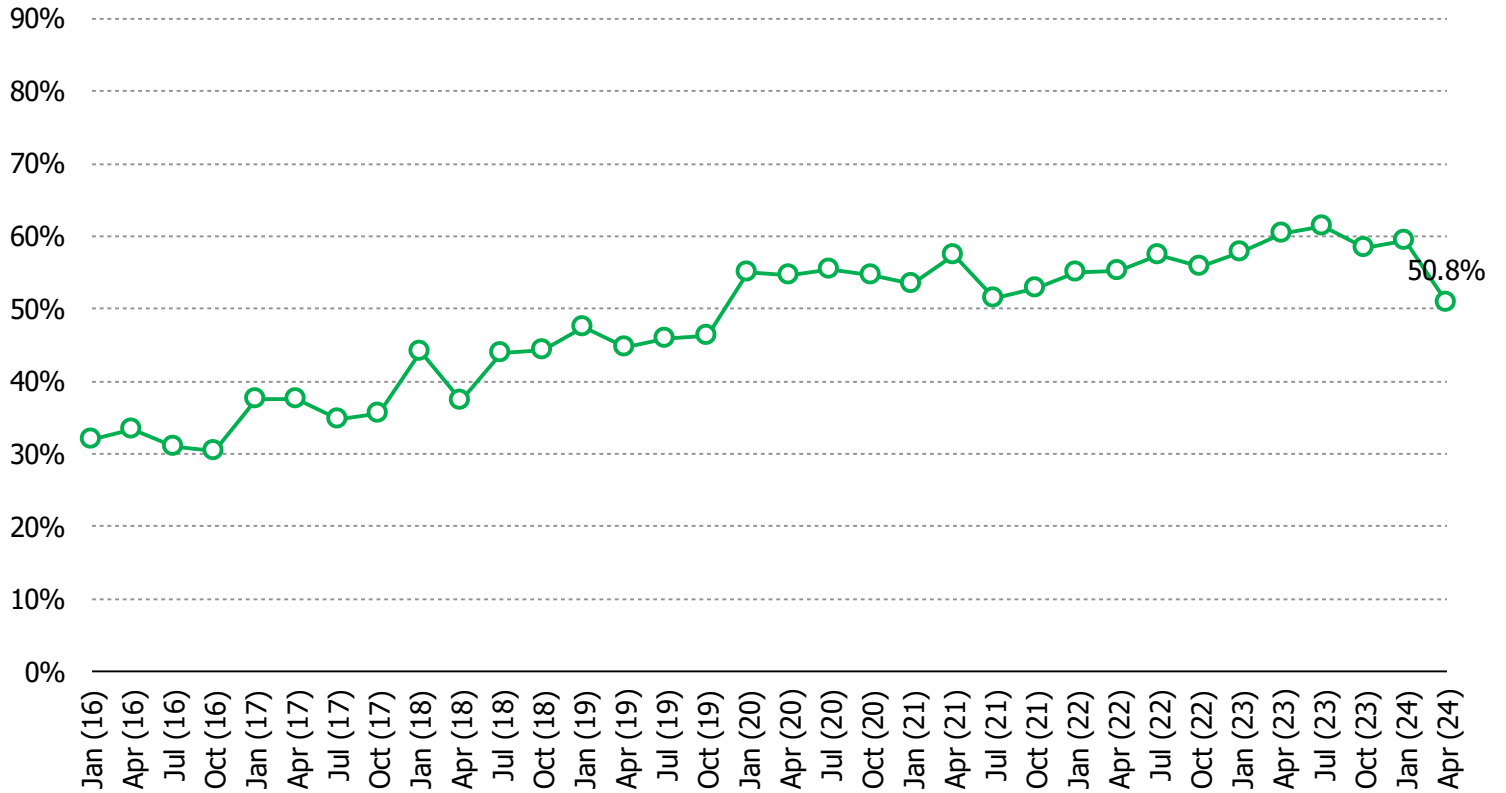
Posed to Amazon users



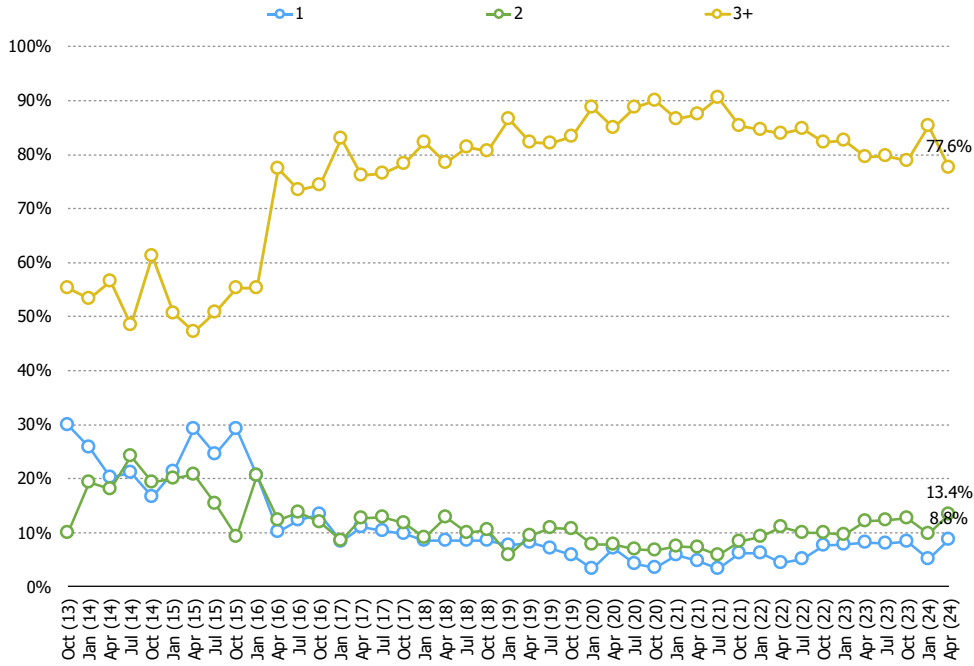


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

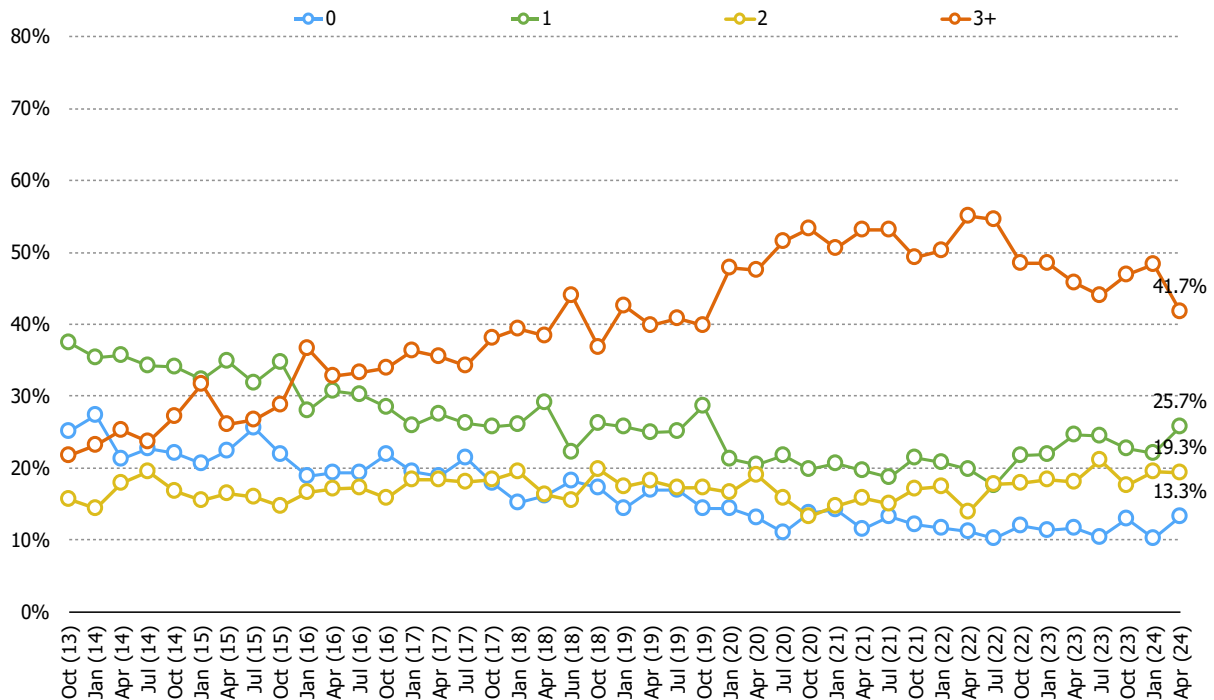
Posed to Amazon users



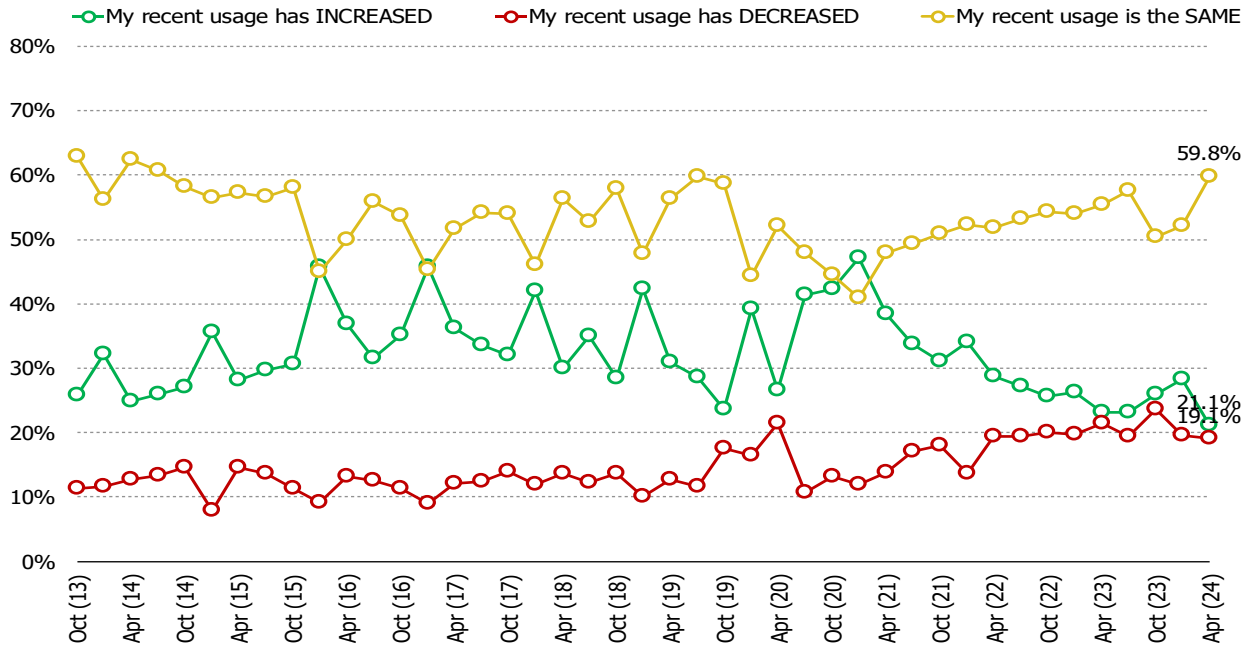
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



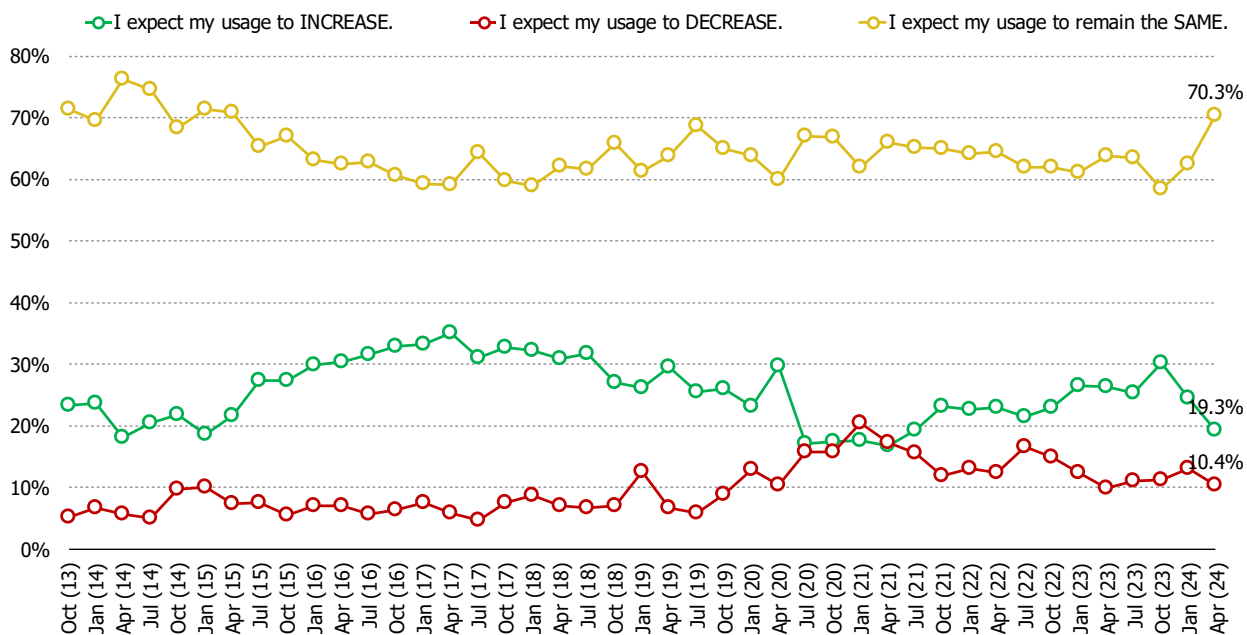
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



AMAZON USERS – RECENT USAGE

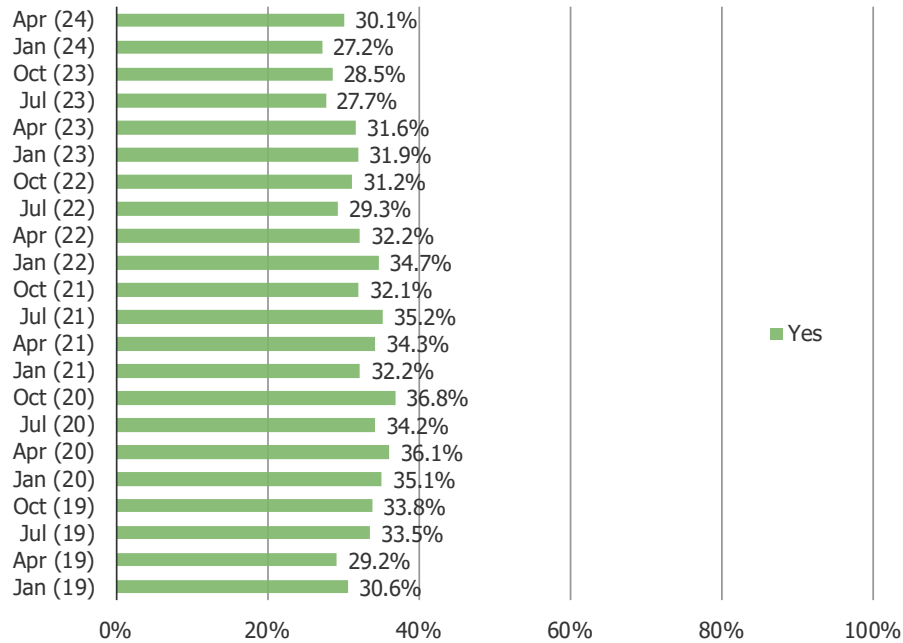


AMAZON USERS – EXPECTED USAGE

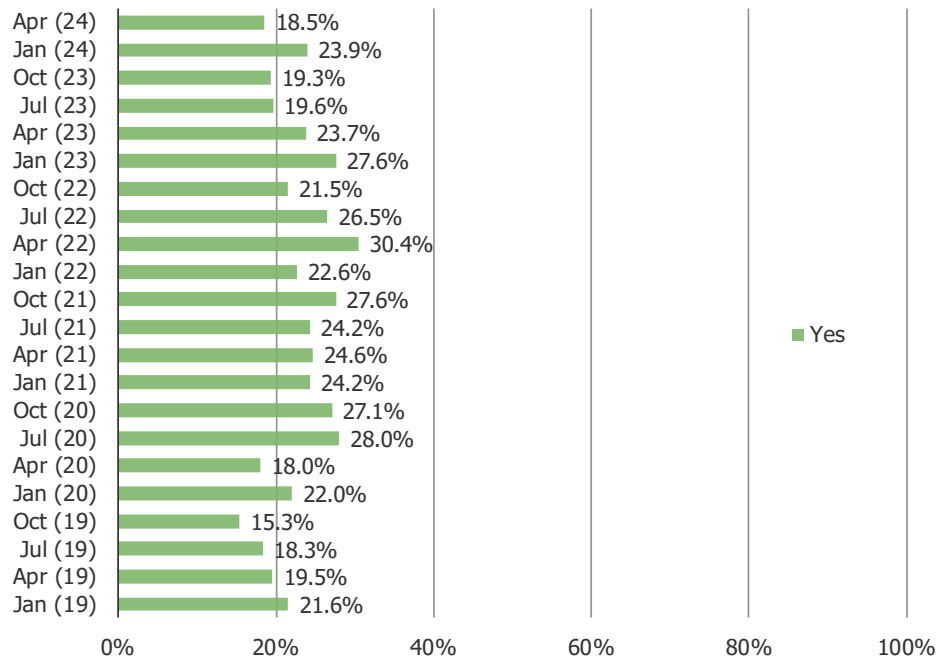


# WAYFAIR TRENDS

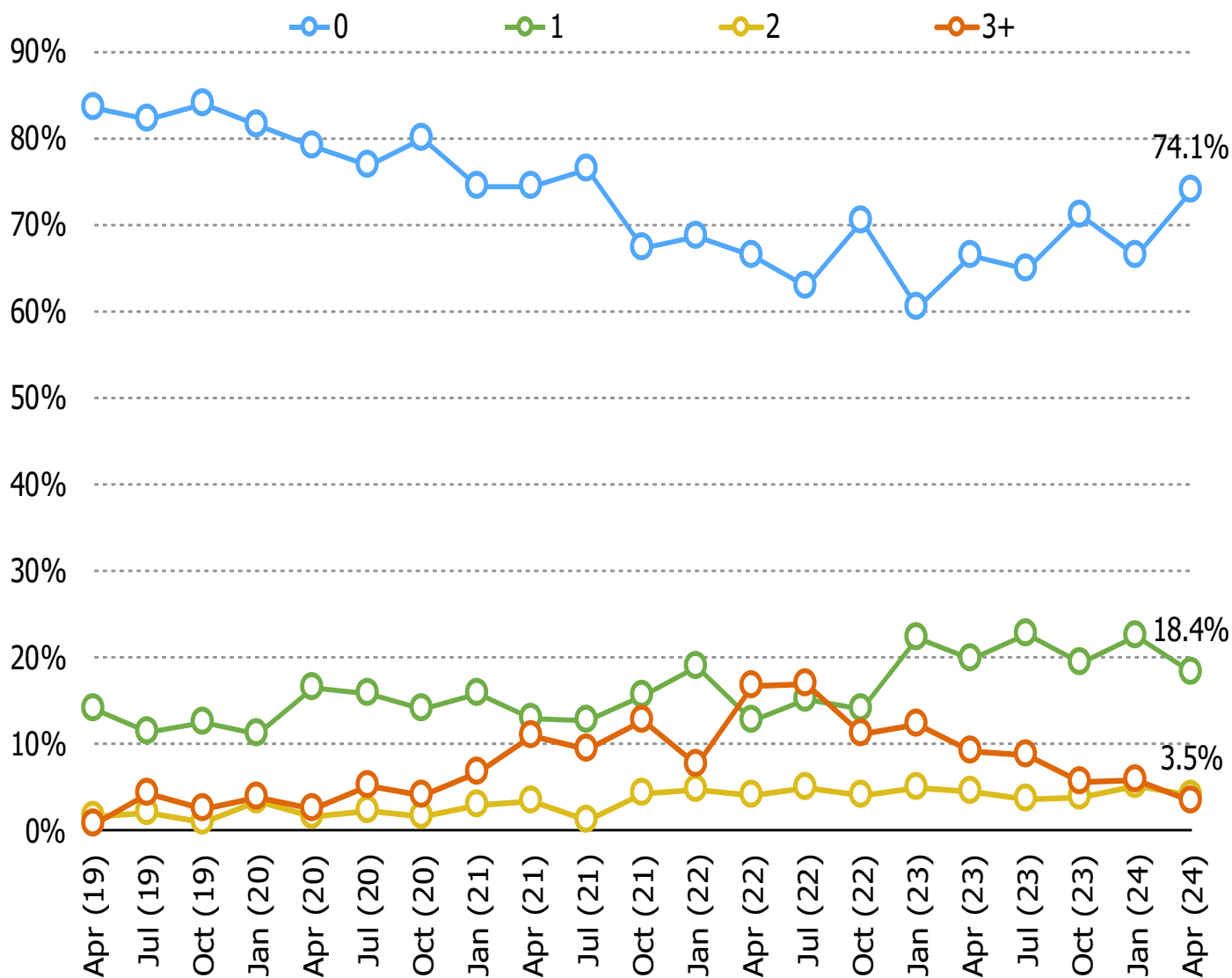
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



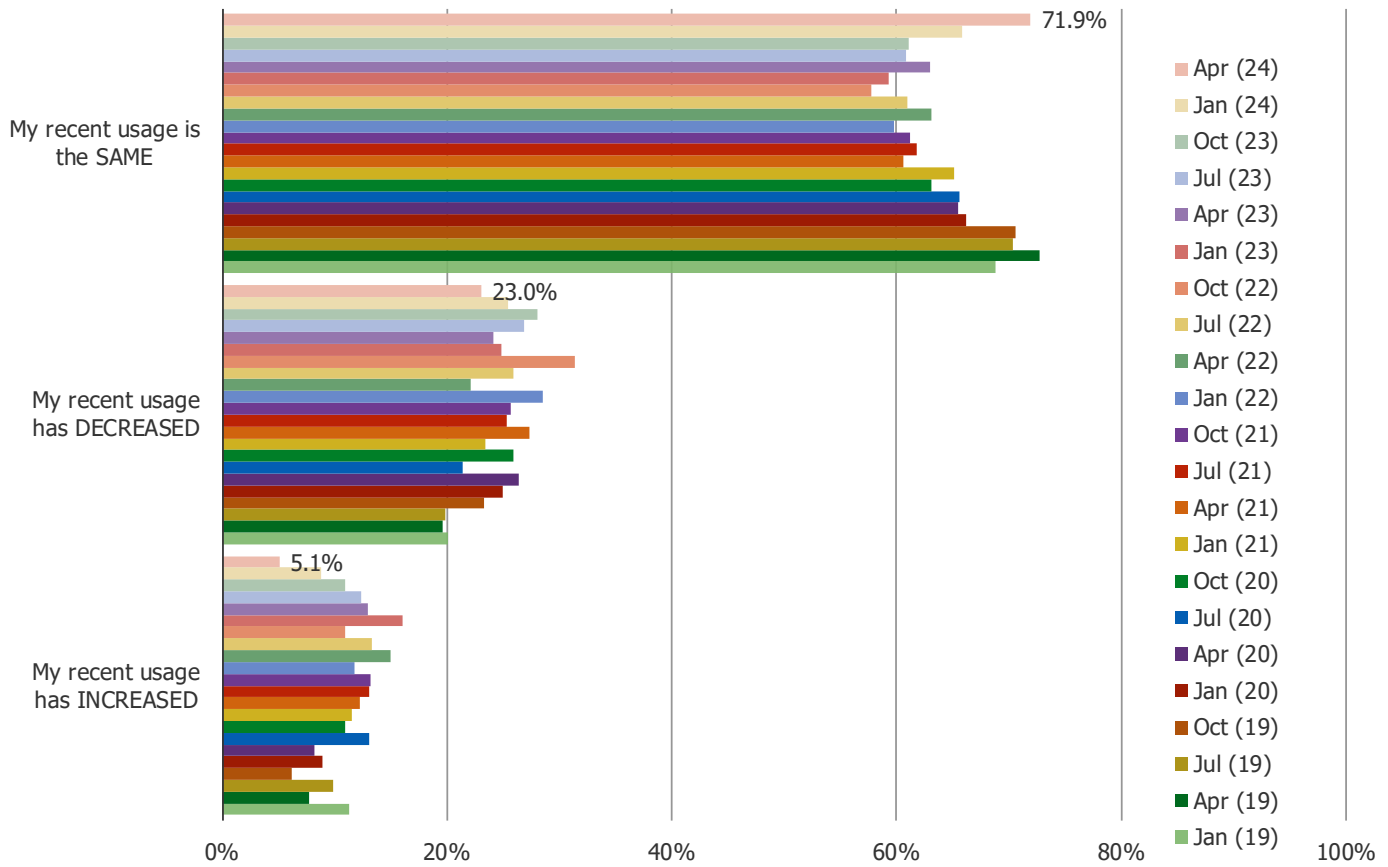
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?



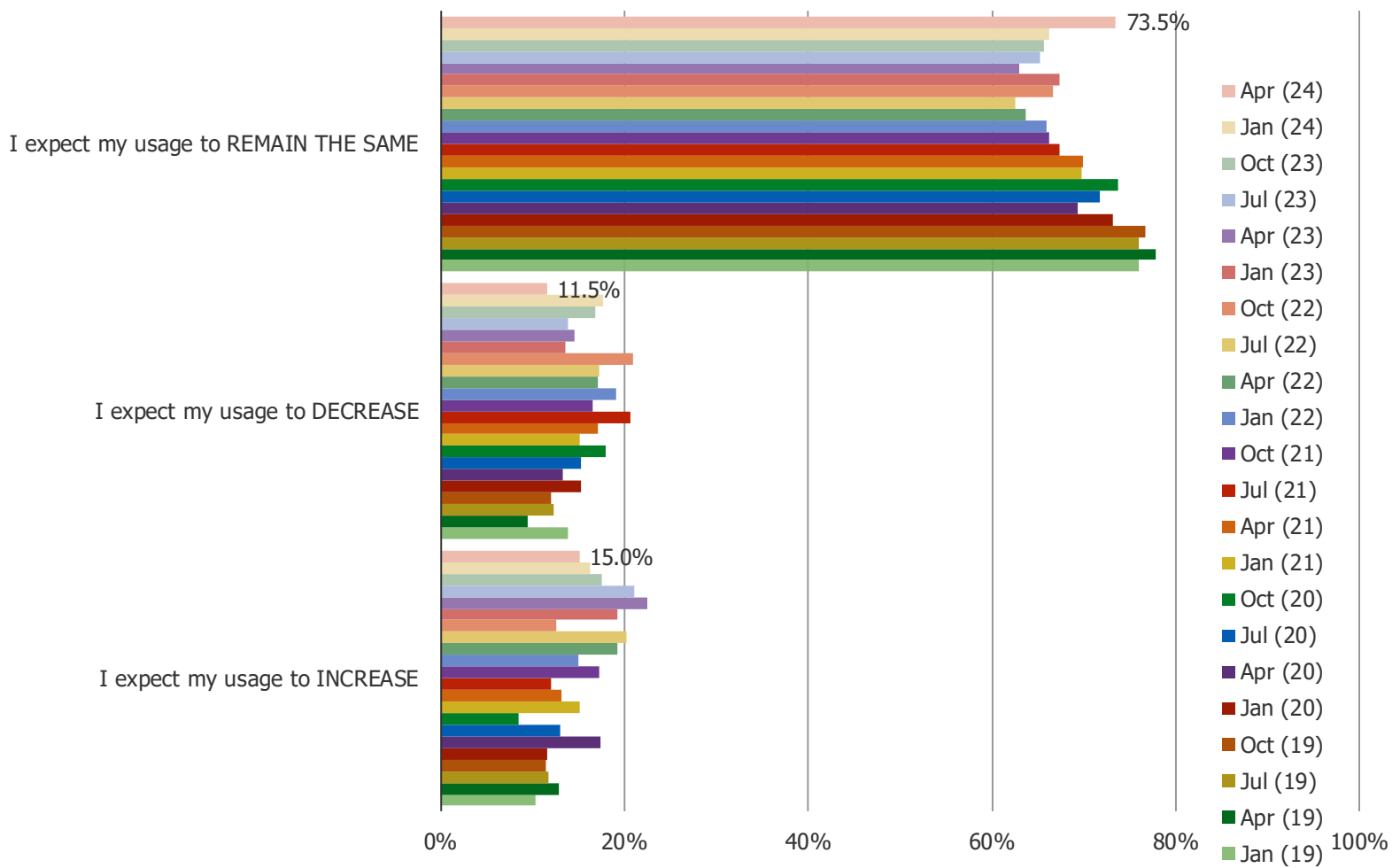
ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



WAYFAIR USERS – RECENT USAGE



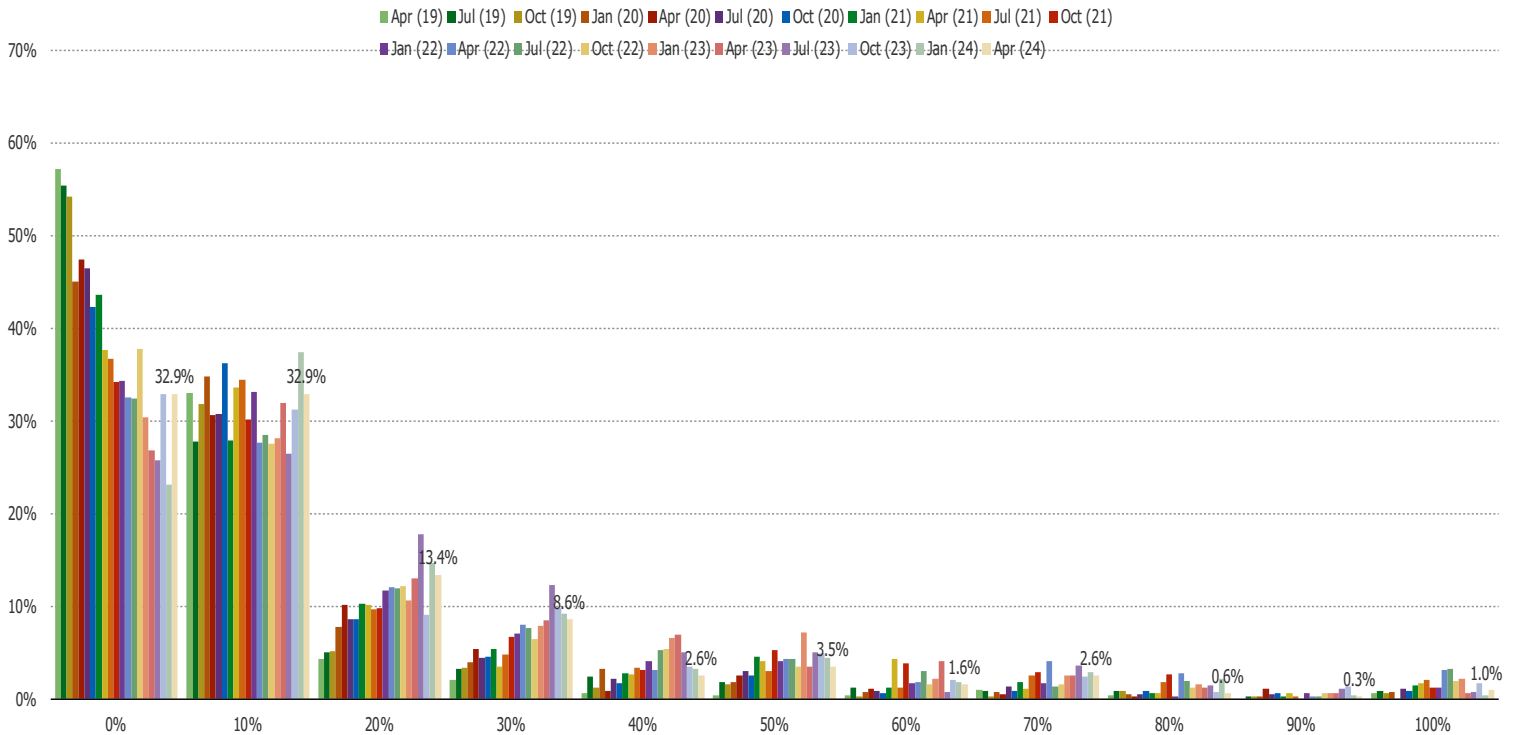
WAYFAIR USERS – EXPECTED USAGE



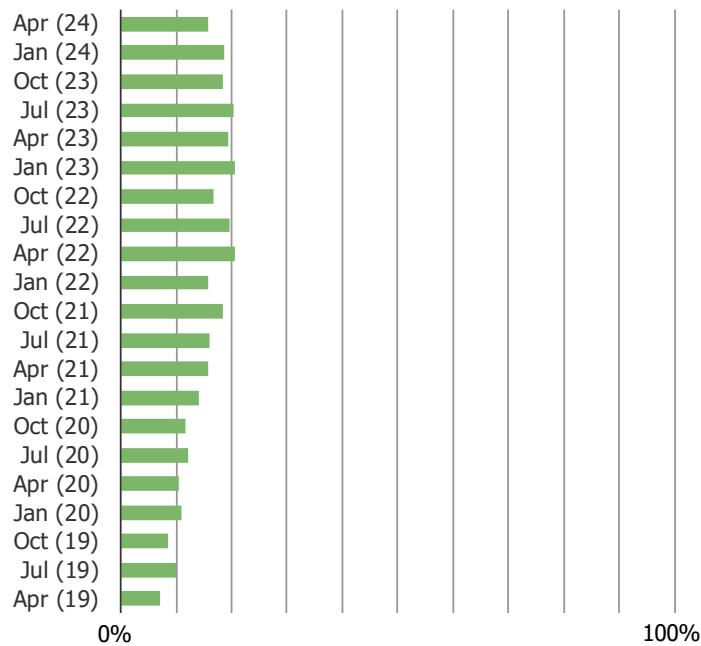


WAYFAIR USERS – WHAT PERCENTAGE OF YOUR TOTAL FURNITURE AND HOME FURNISHINGS PURCHASES DO YOU MAKE THROUGH WAYFAIR?

Posed to Wayfair users.

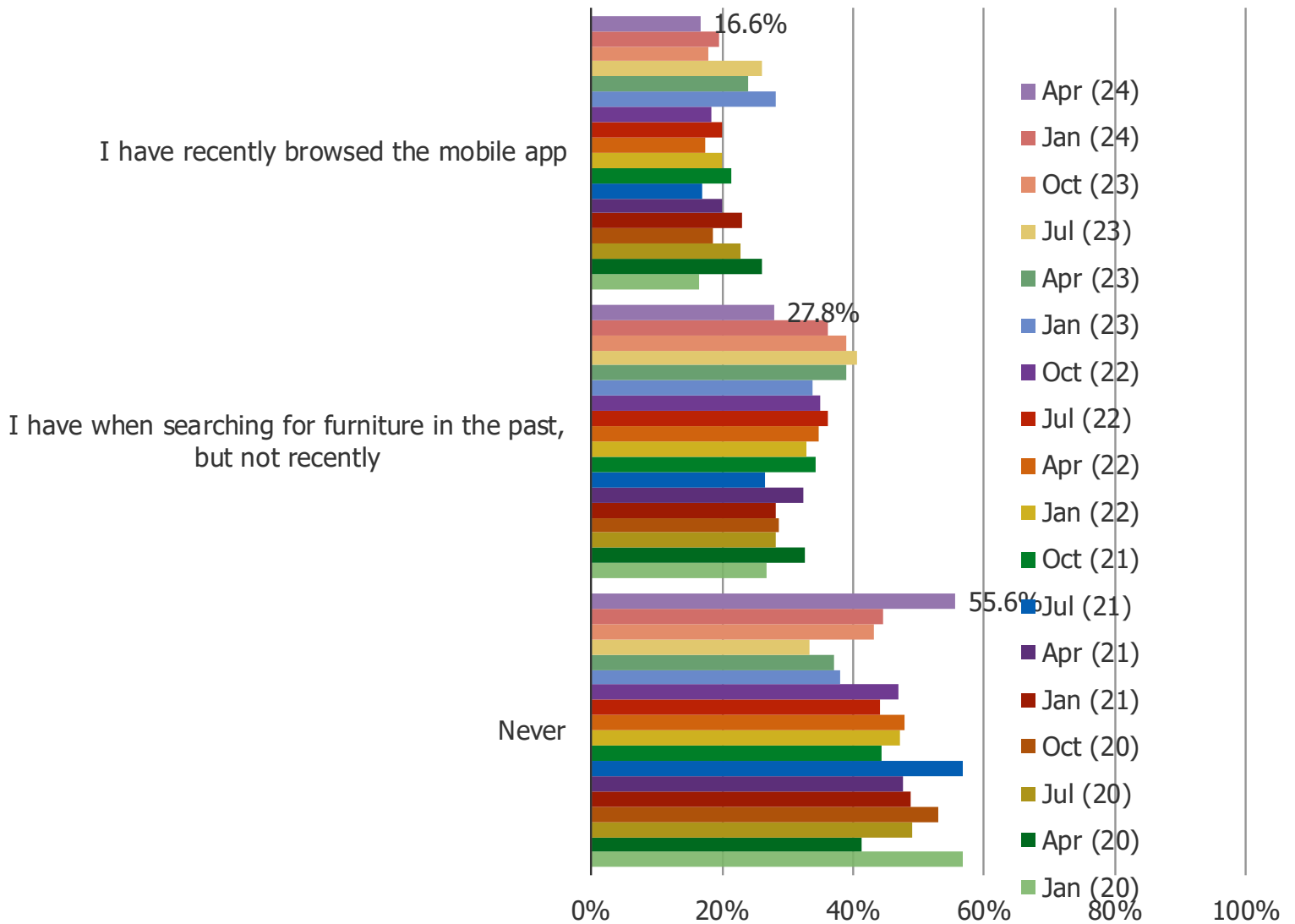


Weighted Average of Chart Above:



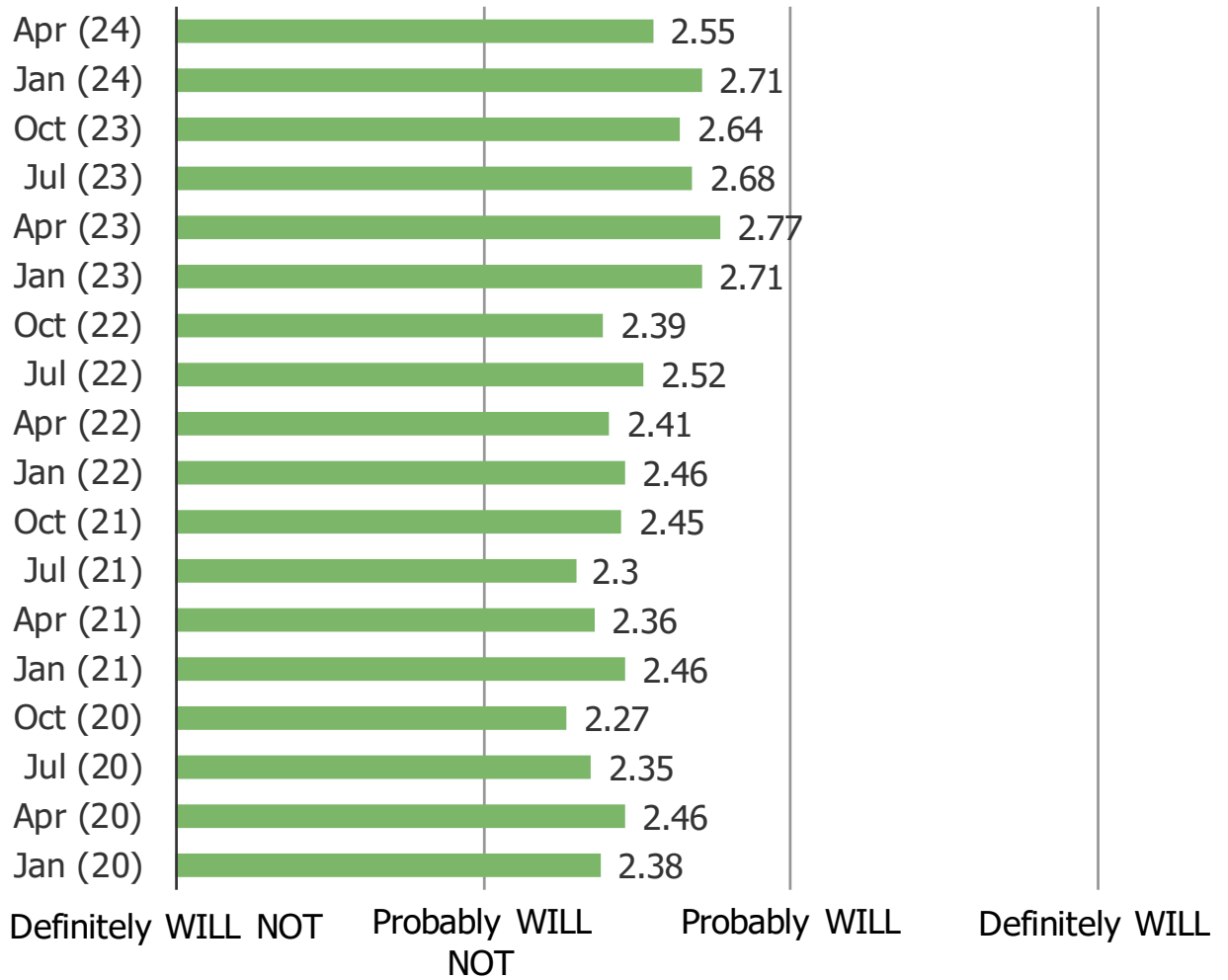
HAVE YOU EVER BROWSED THE WAYFAIR MOBILE APP FOR ITEMS?

Posed to Wayfair users.



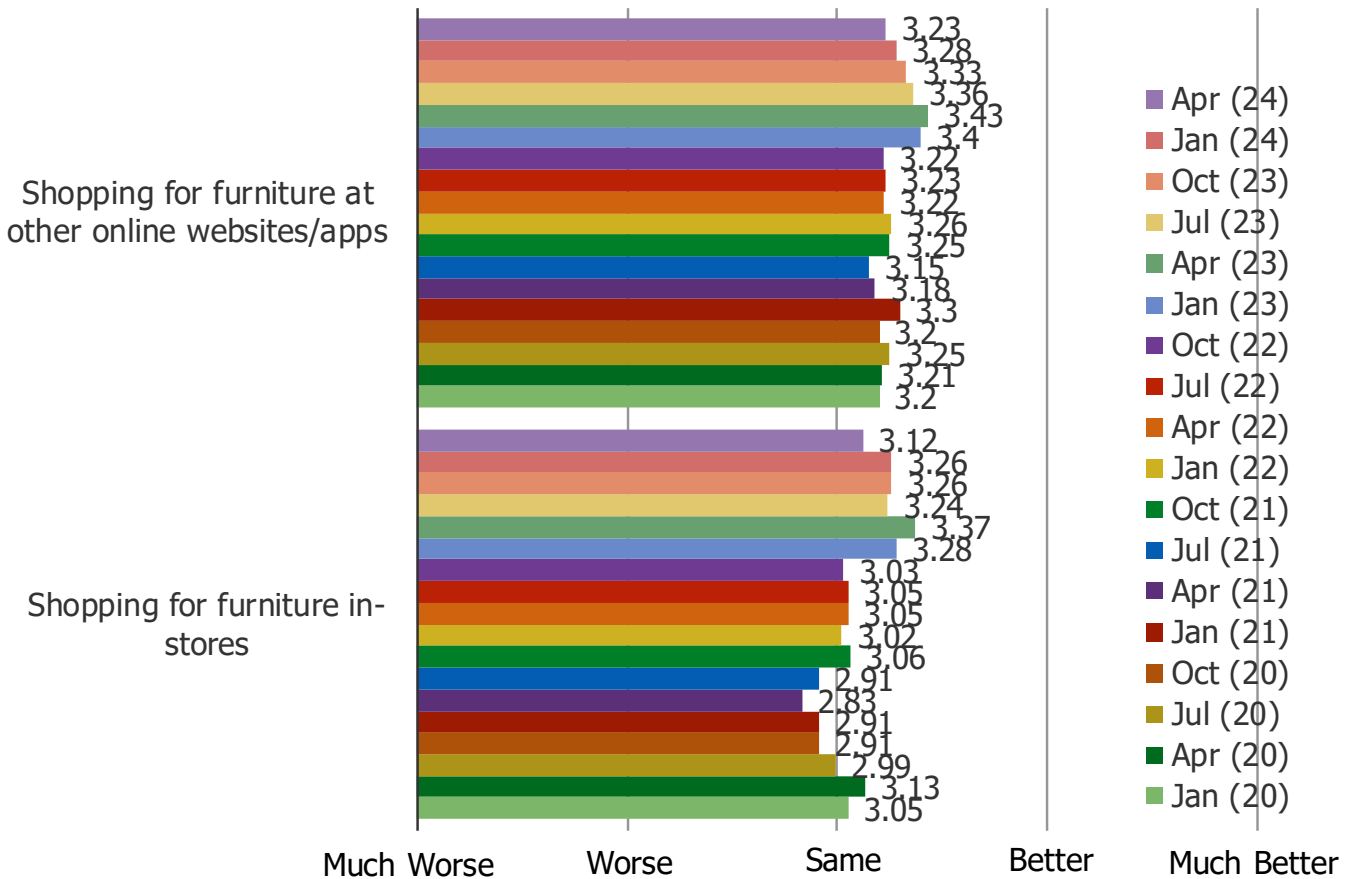
HOW LIKELY ARE YOU TO USE WAYFAIR FOR YOUR NEXT FURNITURE PURCHASE?

Posed to Wayfair users.



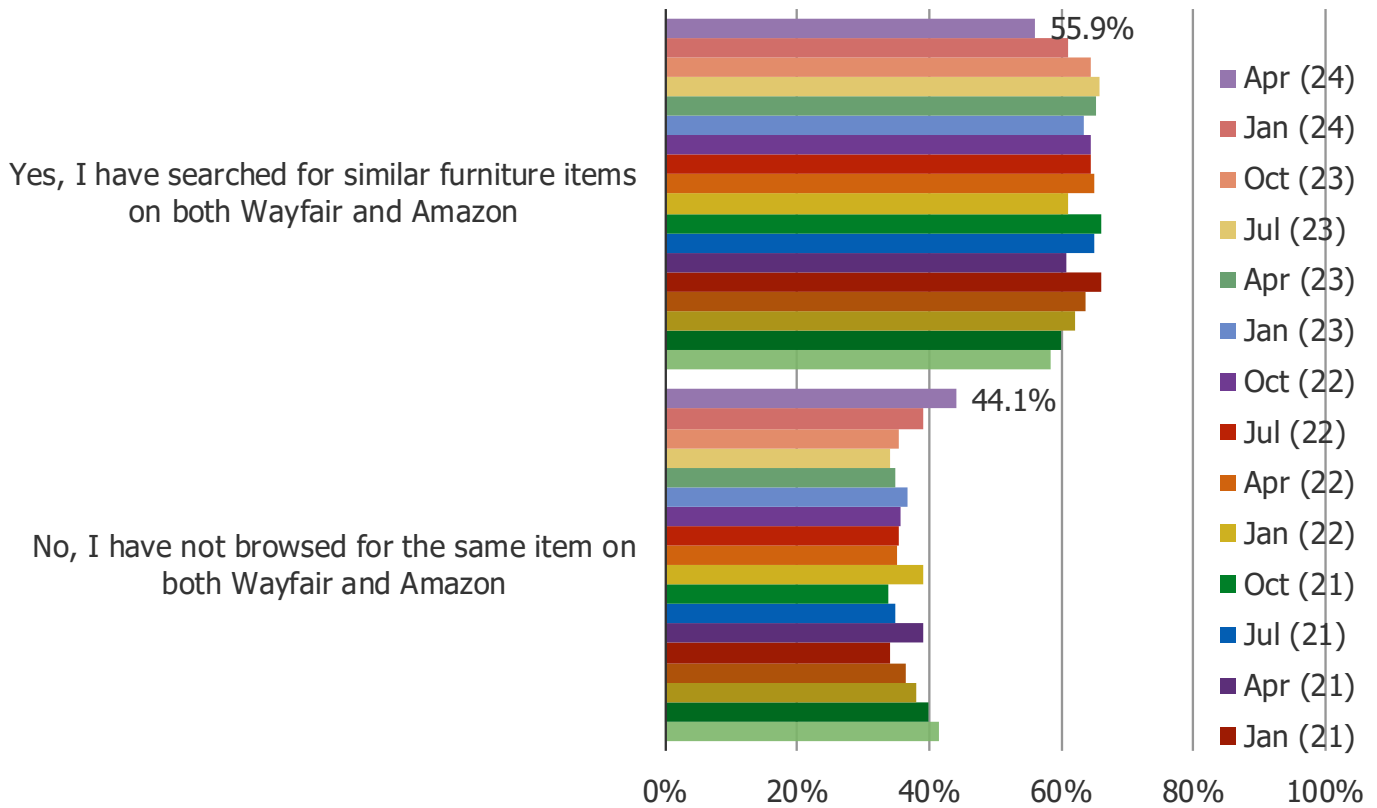
HOW DOES THE WAYFAIR SHOPPING EXPERIENCE COMPARE TO...

Posed to Wayfair users.



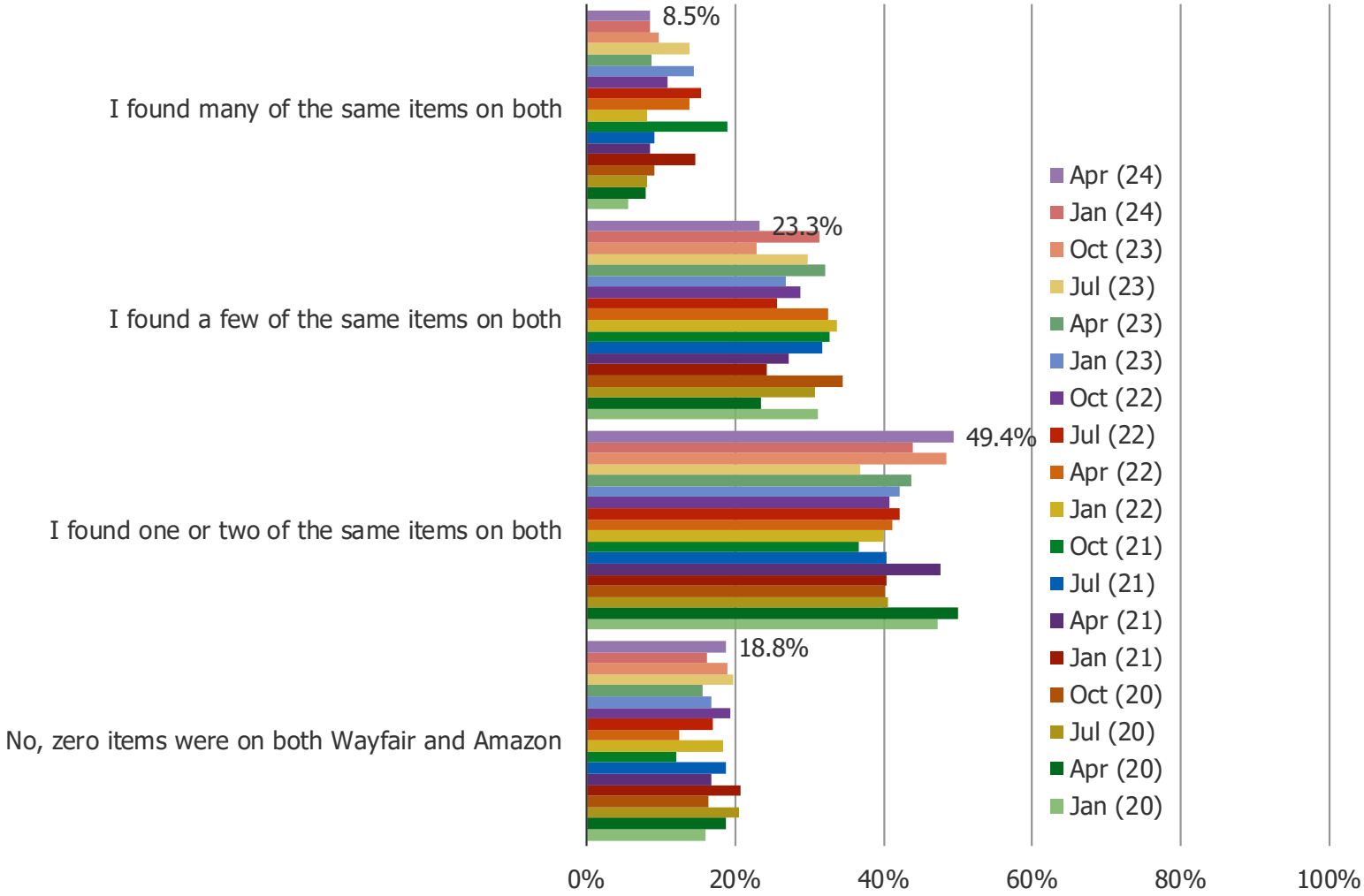
HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.



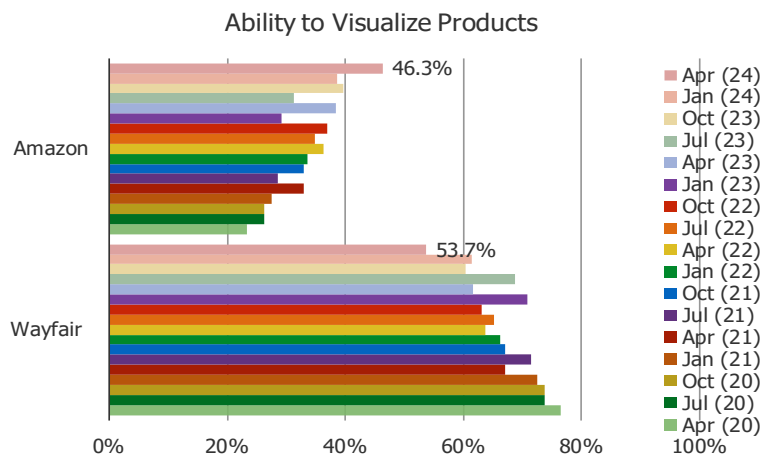
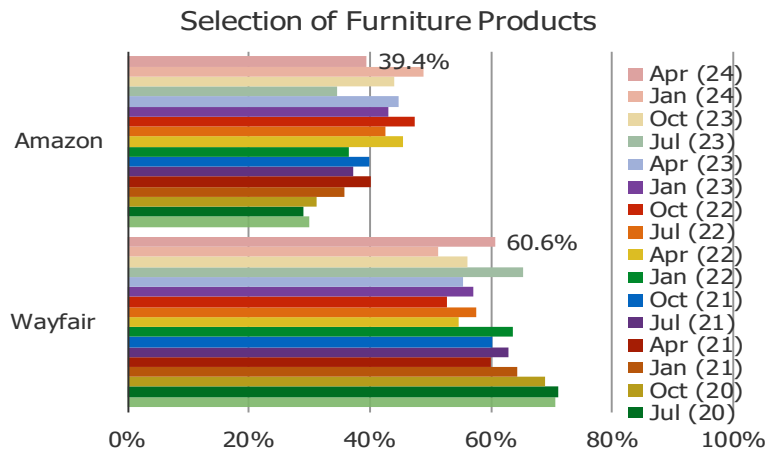
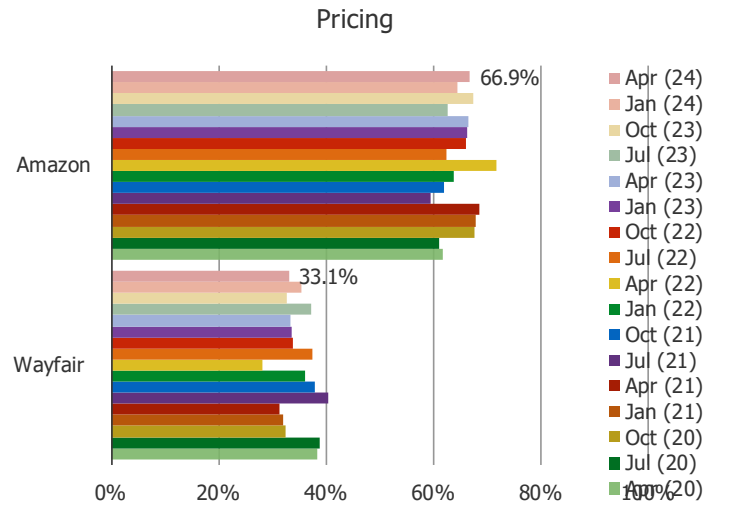
IN THE COURSE OF YOUR SEARCH, DID YOU FIND ANY ITEMS THAT WERE IDENTICAL AND LISTED ON BOTH WAYFAIR AND AMAZON?

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



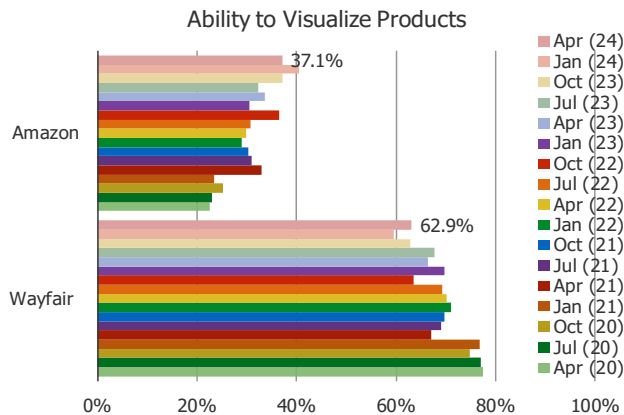
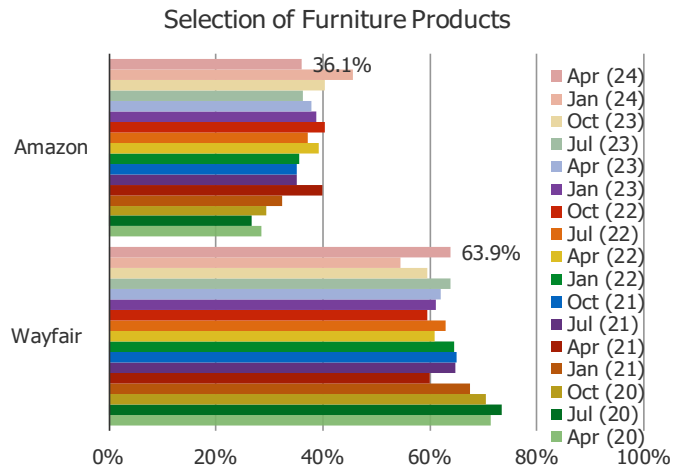
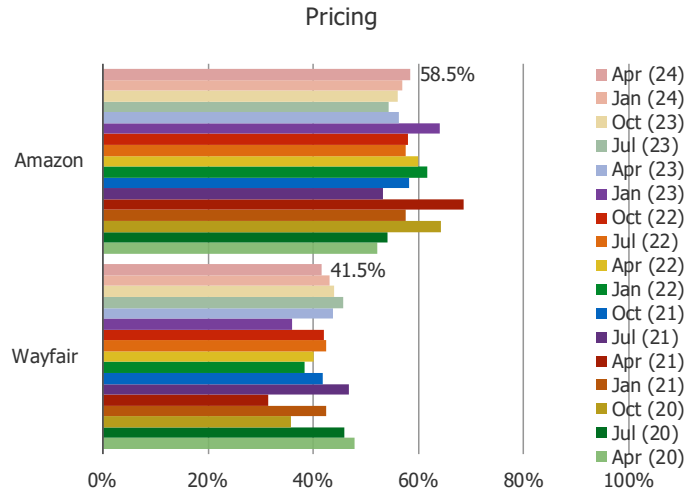
WHEN YOU WERE SHOPPING FOR THE SAME FURNITURE CATEGORY ON BOTH WAYFAIR AND AMAZON, WHICH PLATFORM HAD BETTER...

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...

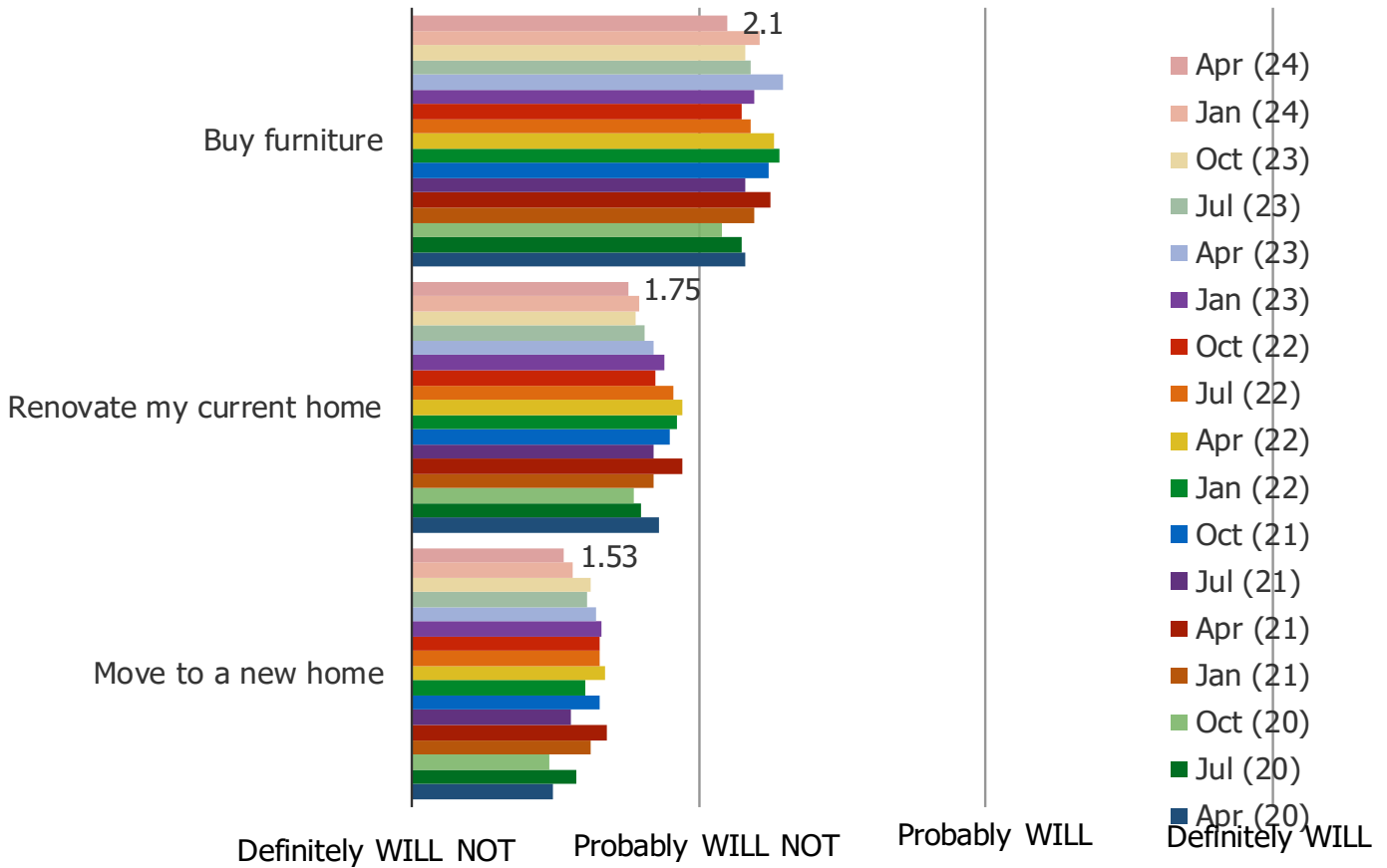
Posed to ALL Wayfair users.





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

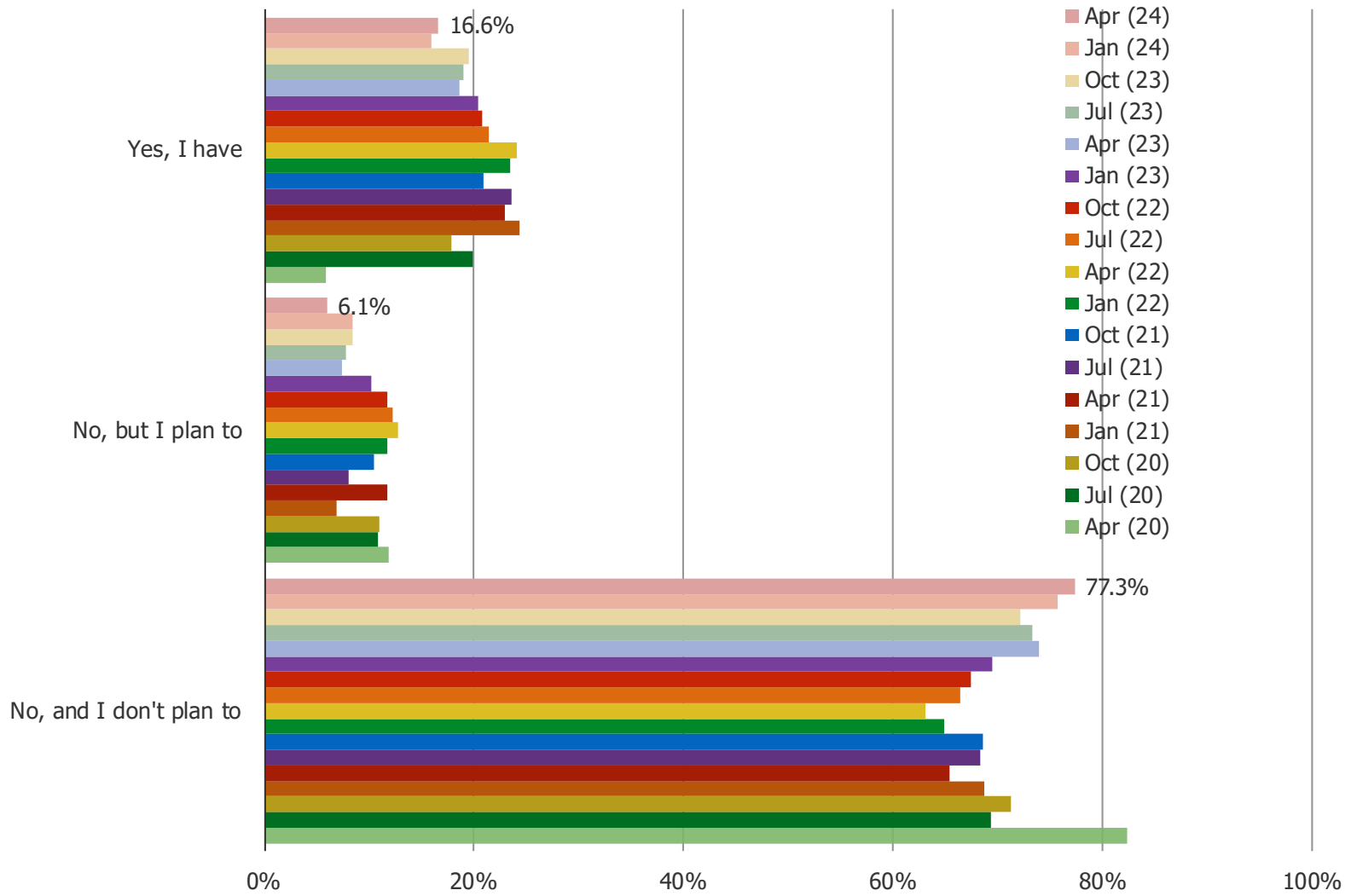
Posed to ALL respondents.



# ETSY TRENDS

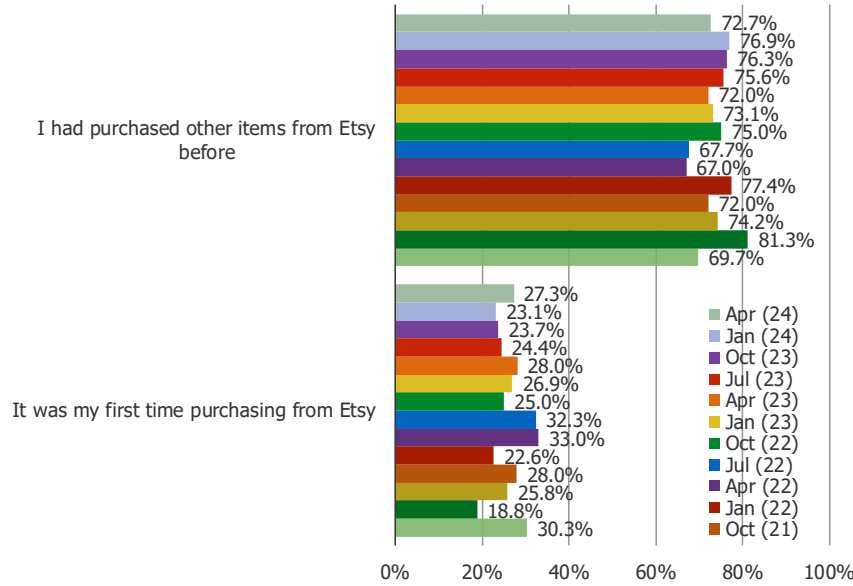
HAVE YOU PURCHASED ANY MASKS / PROTECTIVE FACE MASKS ON ETSY IN THE PAST MONTH OR TWO?

Posed to Etsy users.



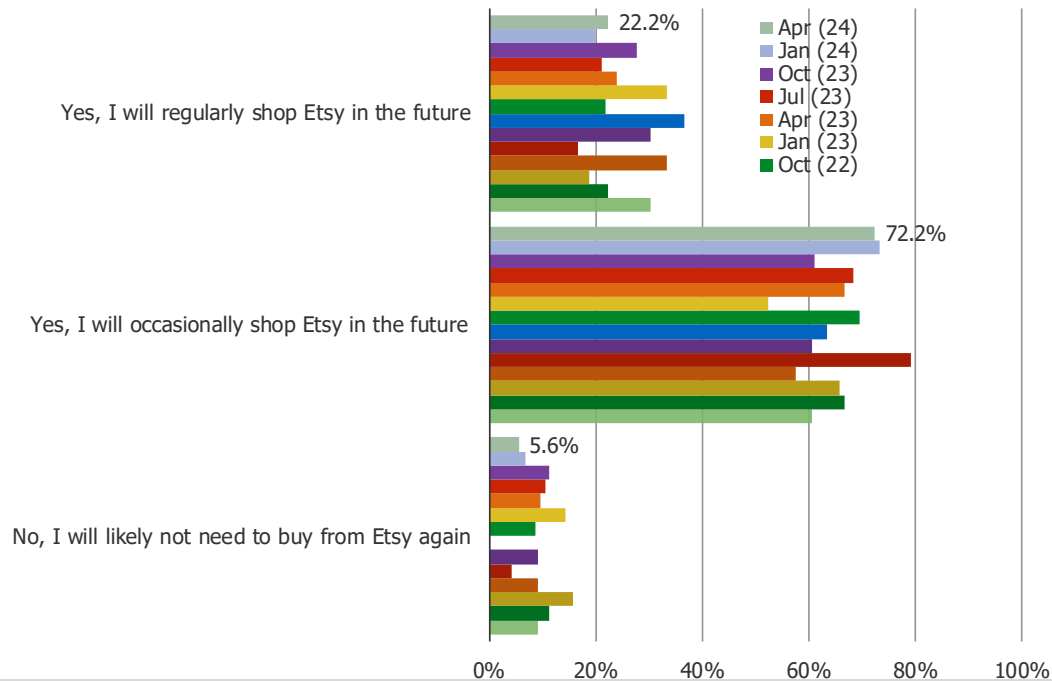
THINKING ABOUT YOUR MASK PURCHASE FROM ETSY, WAS IT YOUR FIRST TIME PURCHASING AN ITEM FROM ETSY OR HAD YOU ALREADY PURCHASED OTHER ITEMS FROM ETSY BEFORE?

Posed to users who purchased a mask from Etsy.

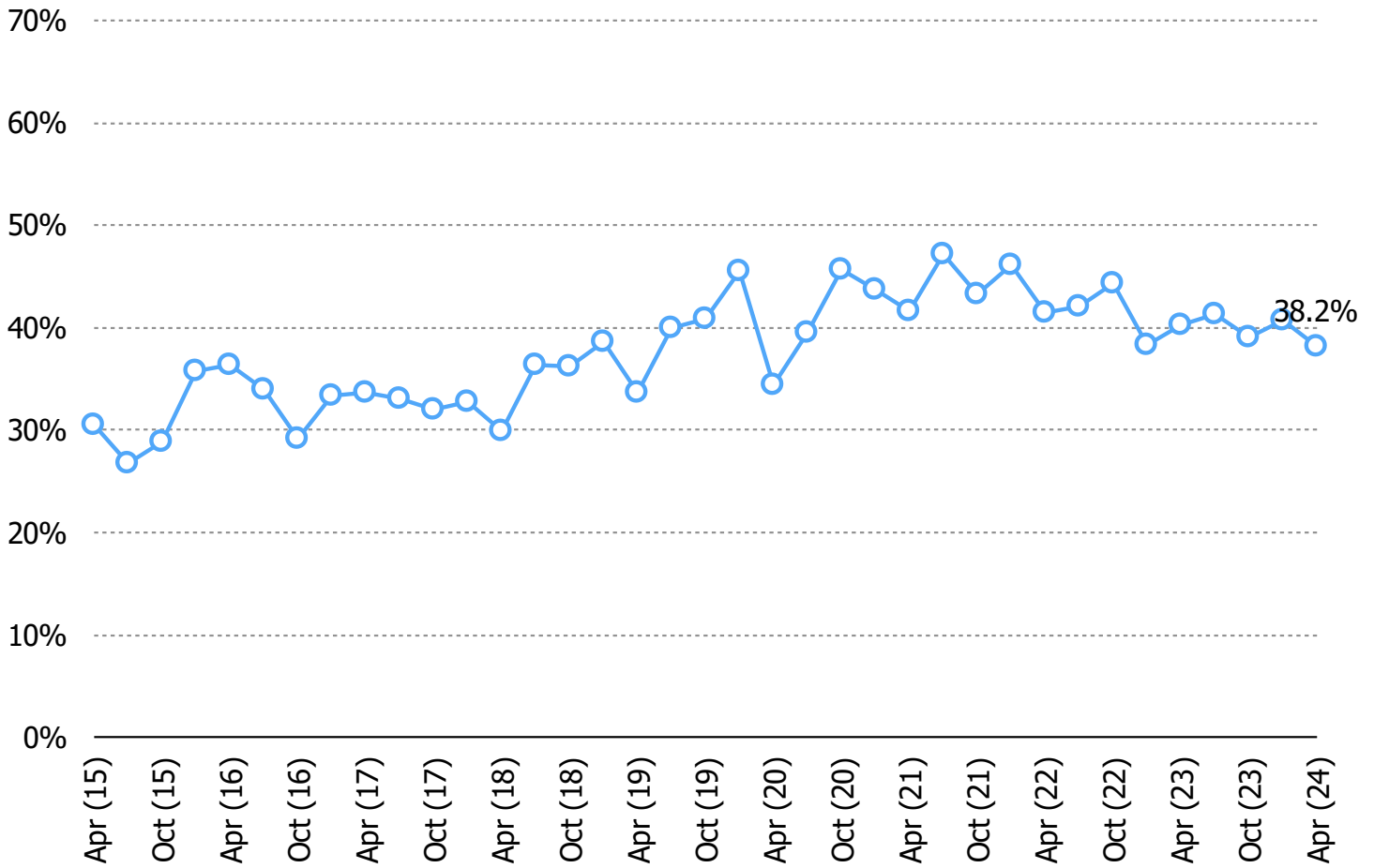


DO YOU EXPECT TO CONTINUE SHOPPING FOR PRODUCTS ON ETSY IN THE FUTURE?

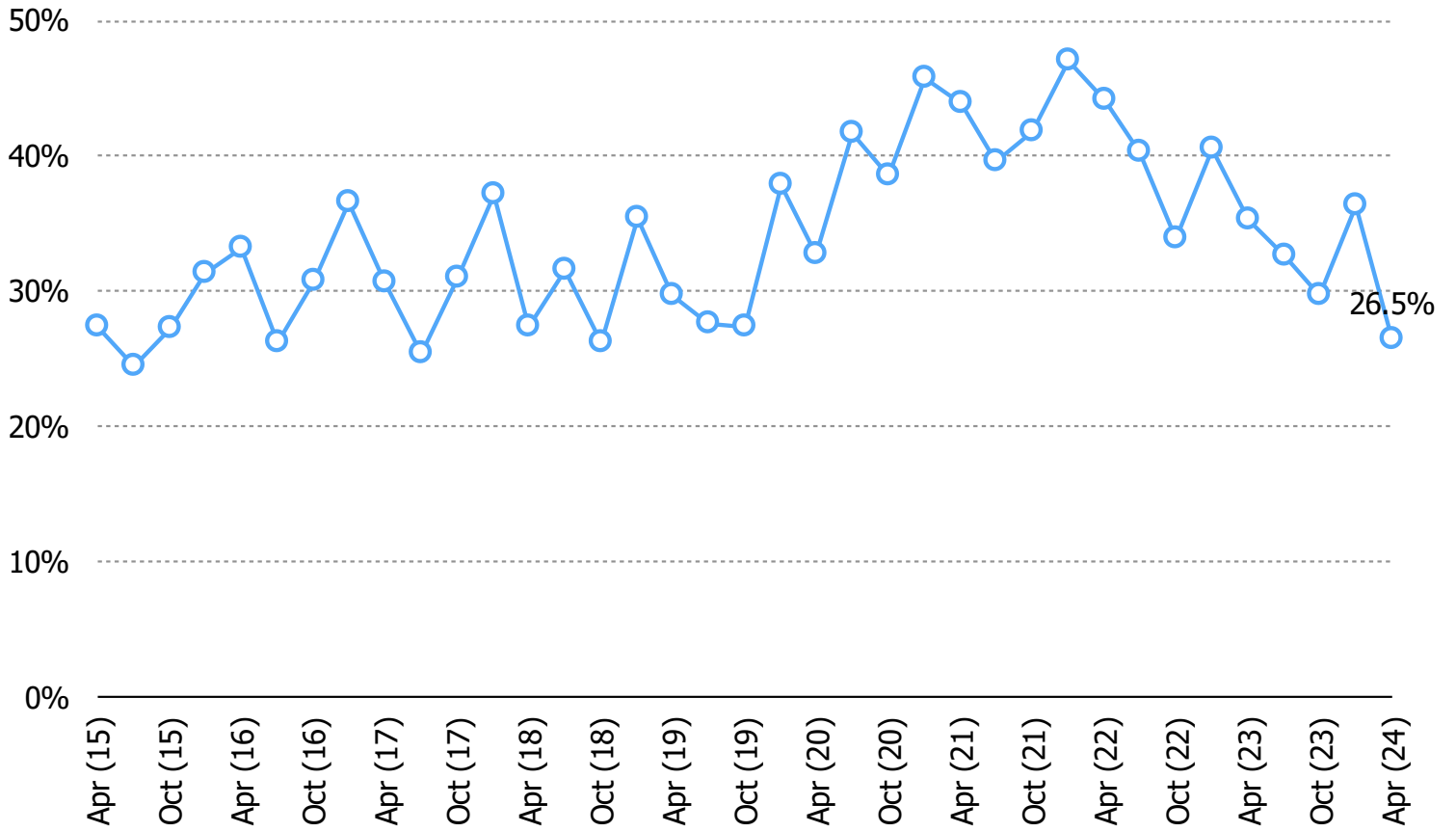
Posed to users whose first purchase from Etsy was a mask.



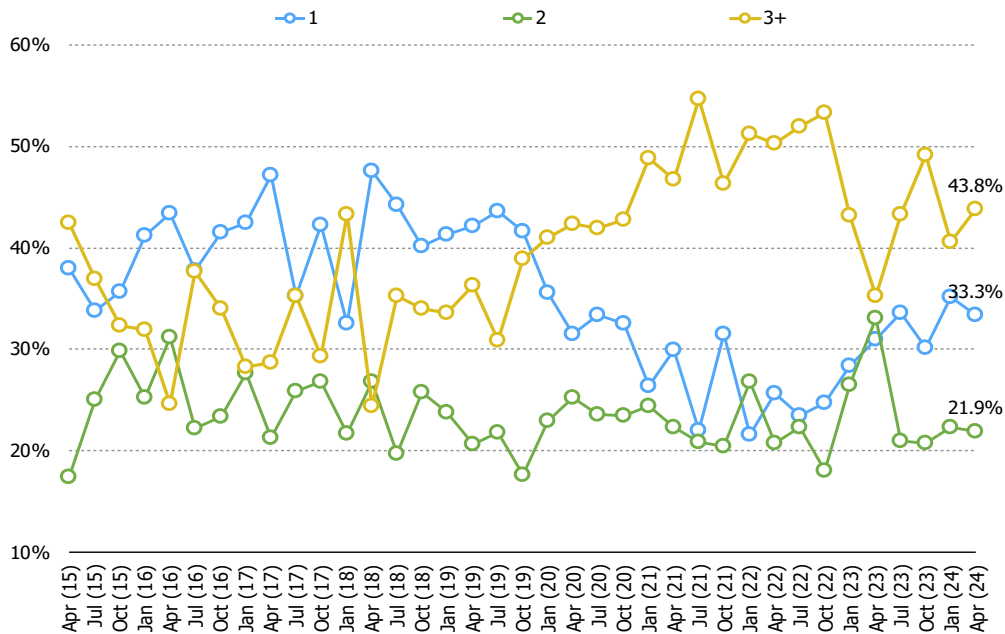
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



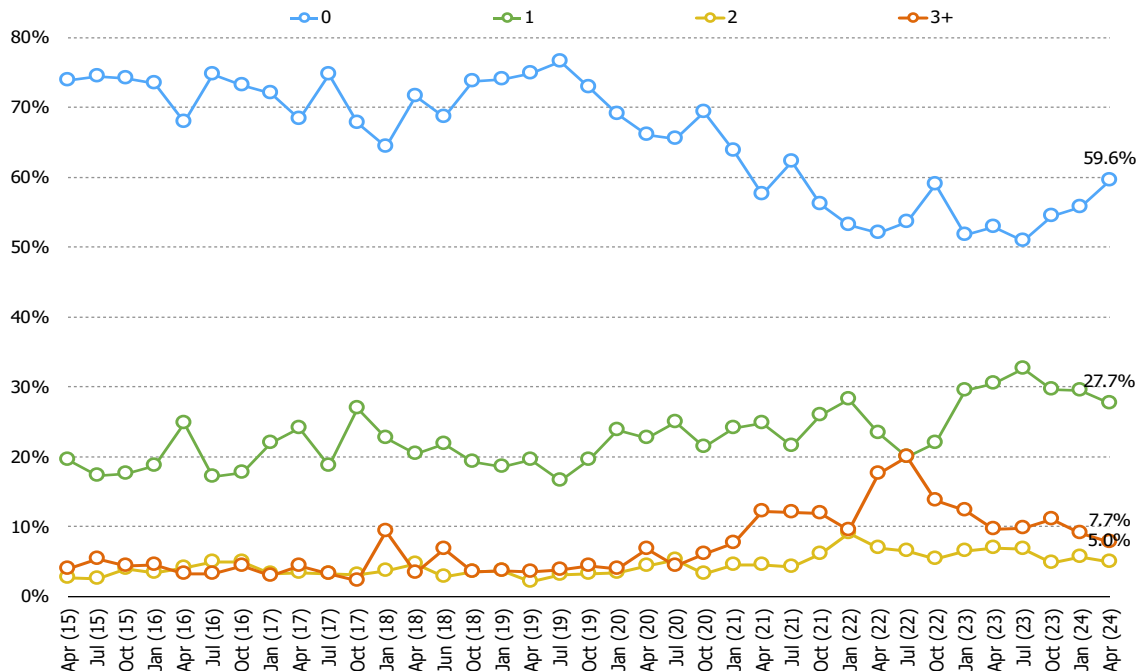
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



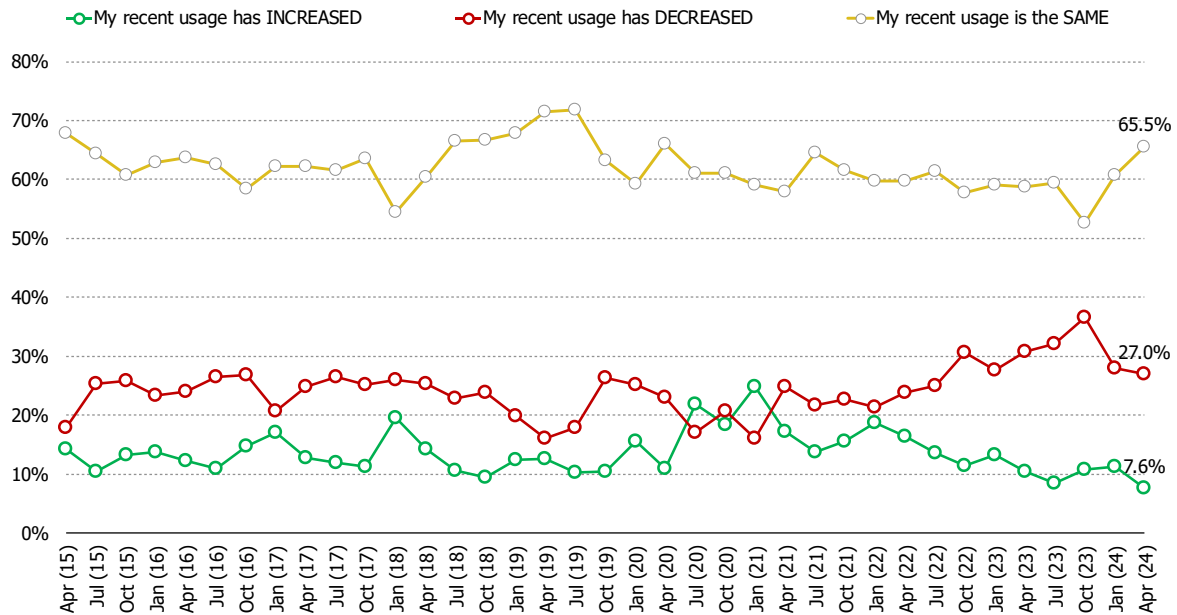
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



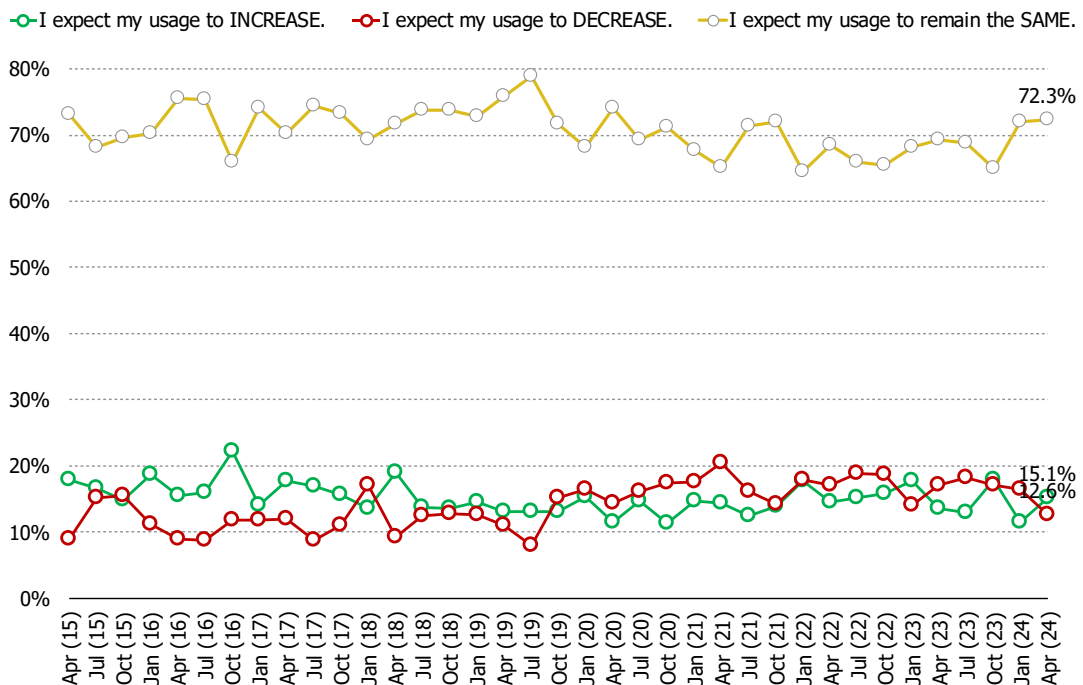
ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH



ETSY USERS – RECENT USAGE



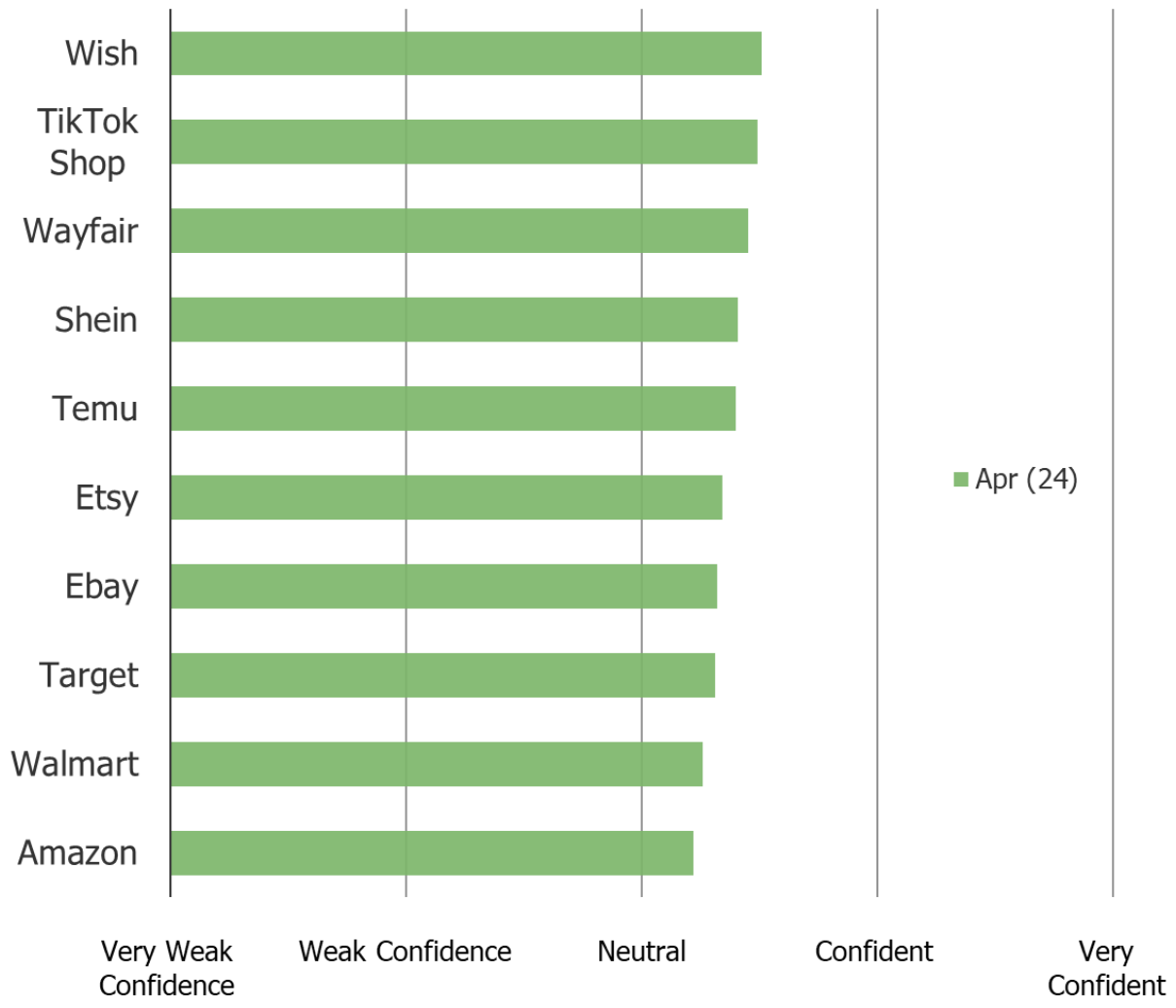
ETSY USERS – EXPECTED USAGE





# CROSS-TAB ANALYSIS

CURRENT SPENDING CONFIDENCE OVERALL...

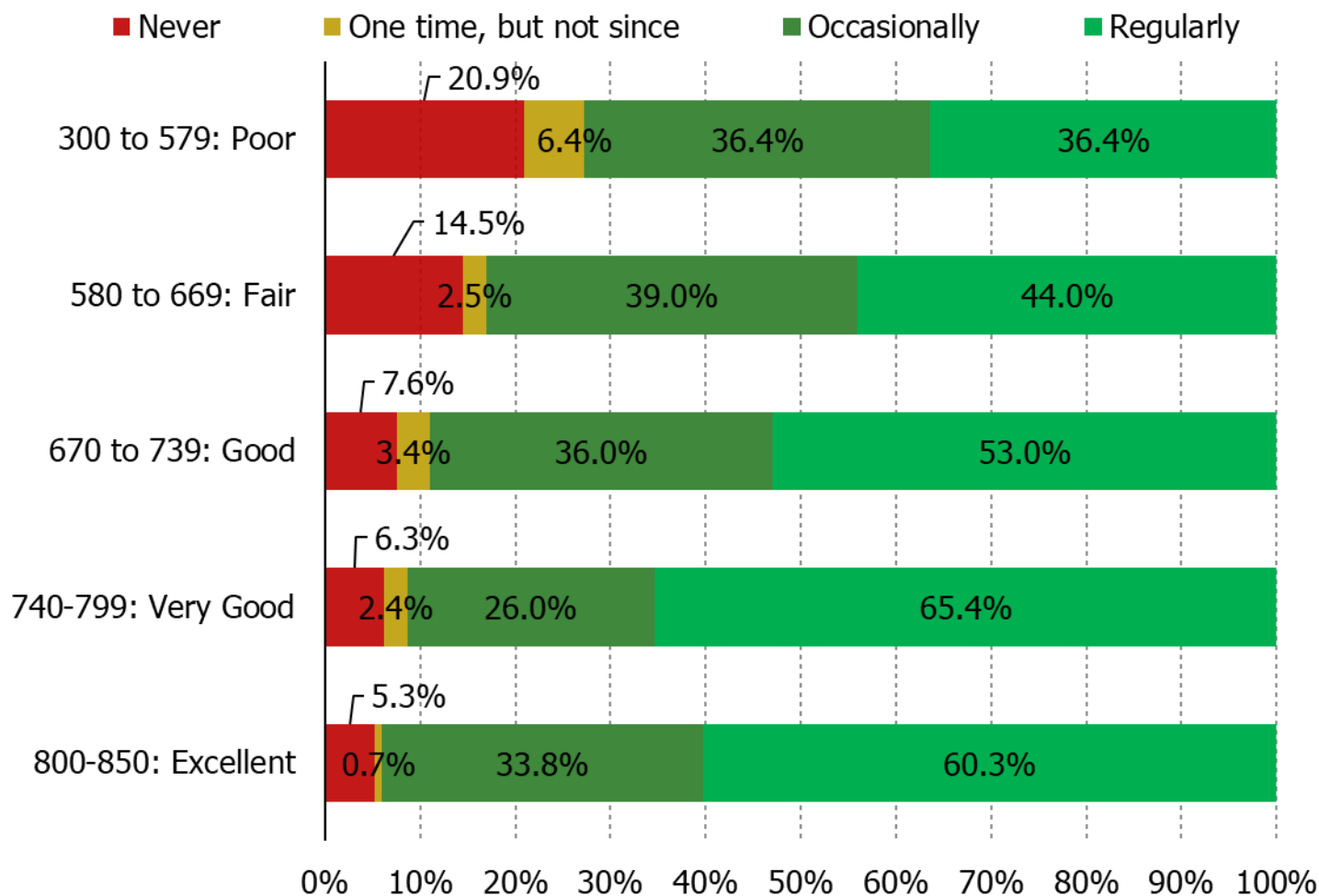


\* This chart filters respondents who occasionally or regularly shop each of the above and shows how confident these respondents currently feel overall in spending money.

Experience with Amazon – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

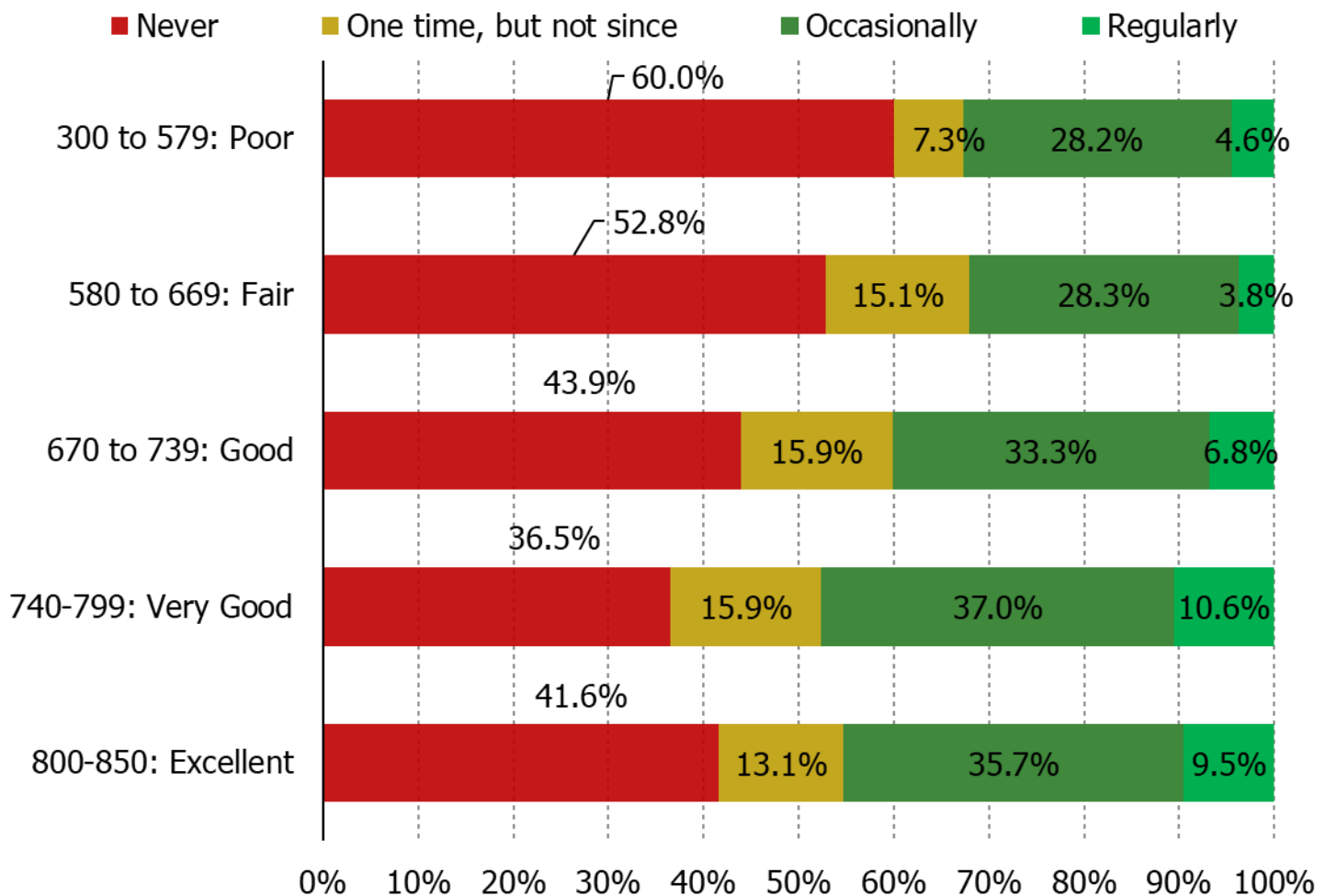


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with eBay – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

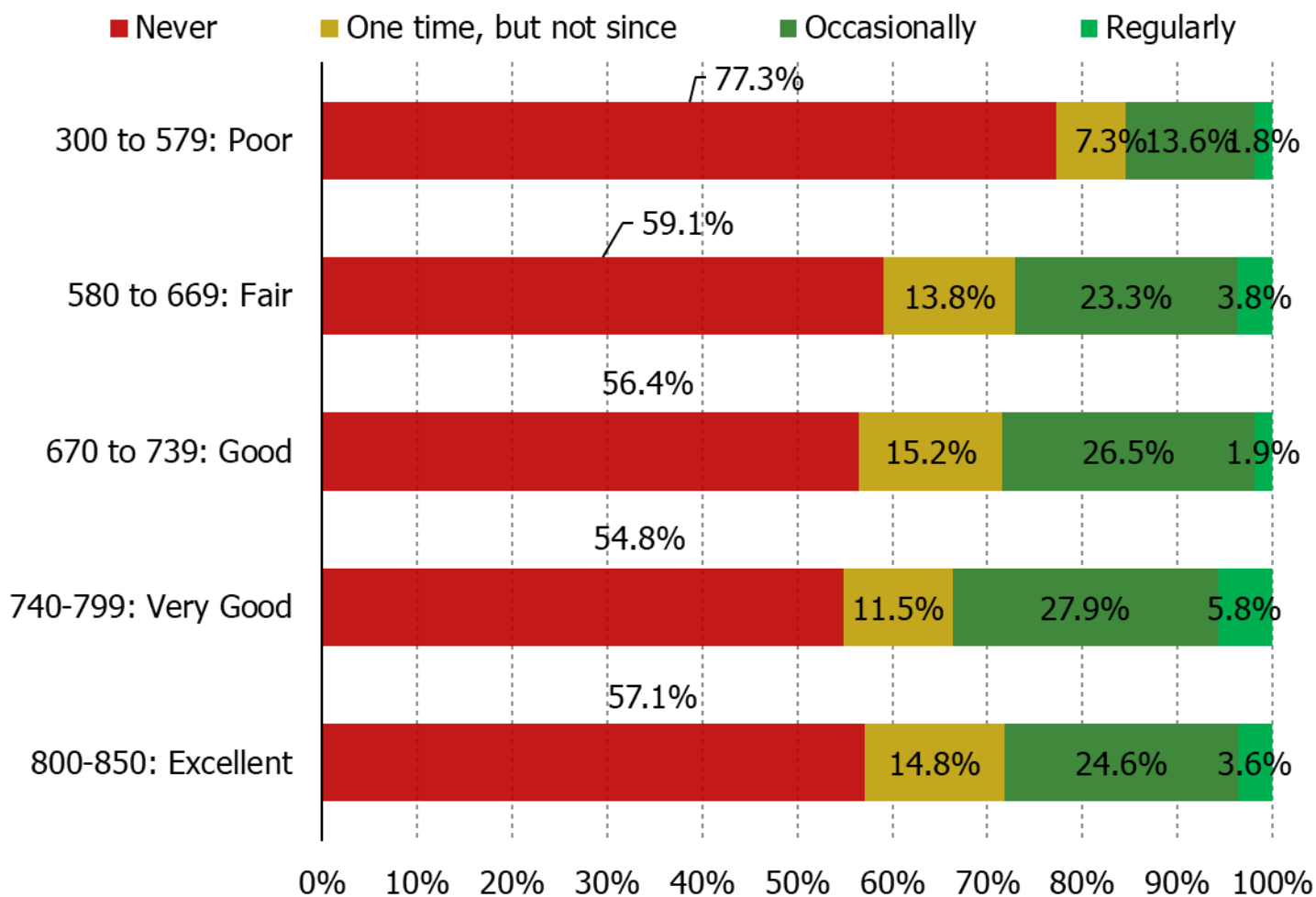


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Etsy – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

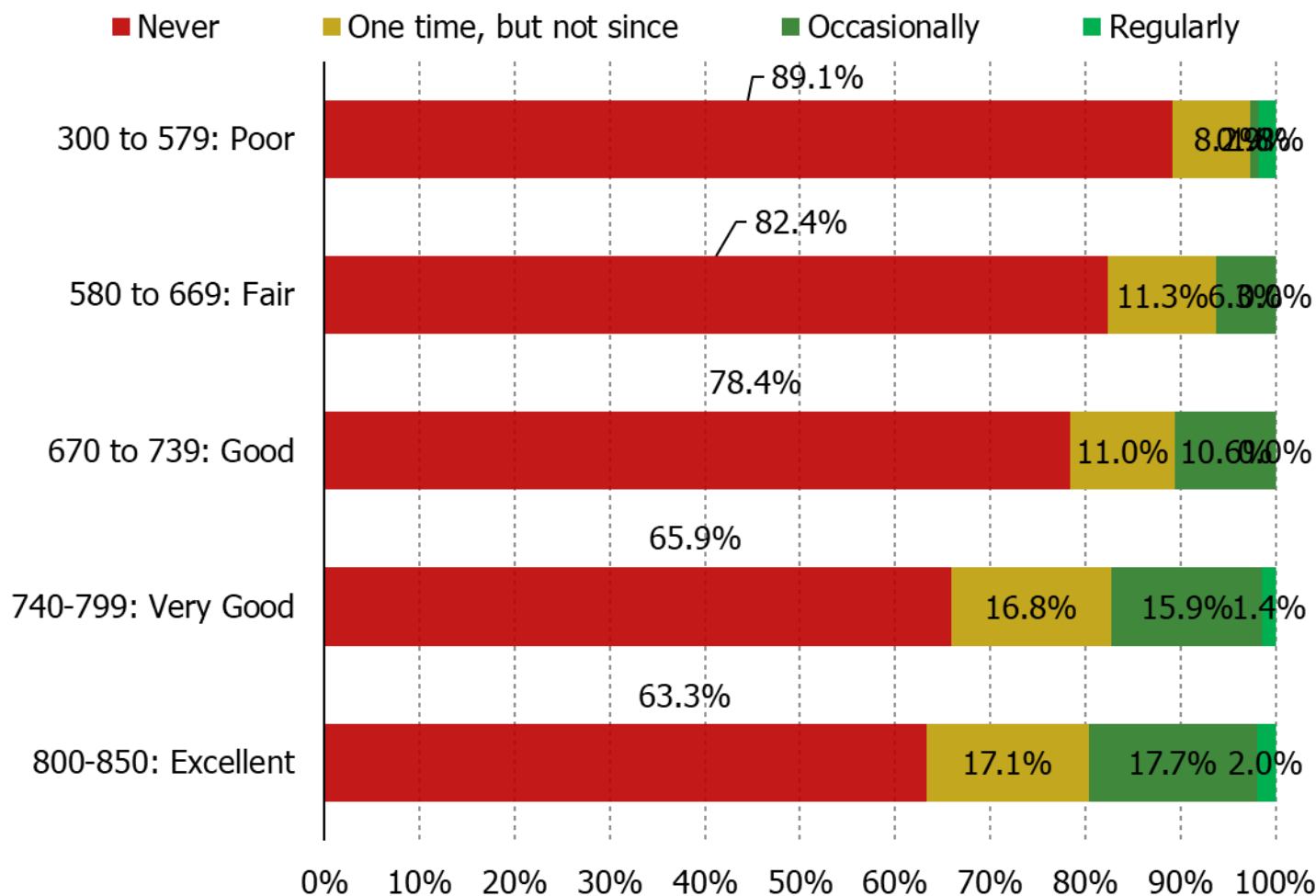


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Overstock – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

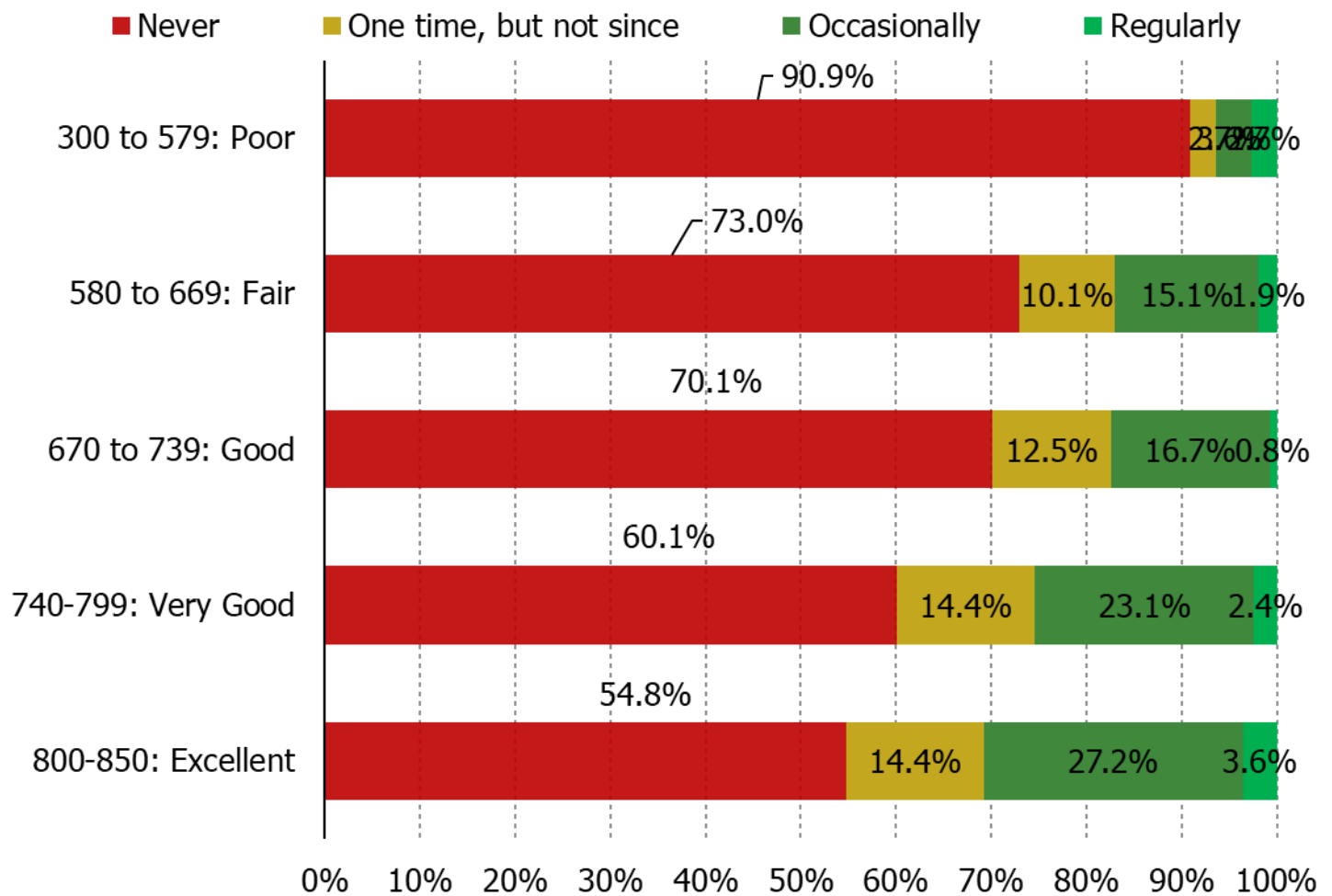


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wayfair – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

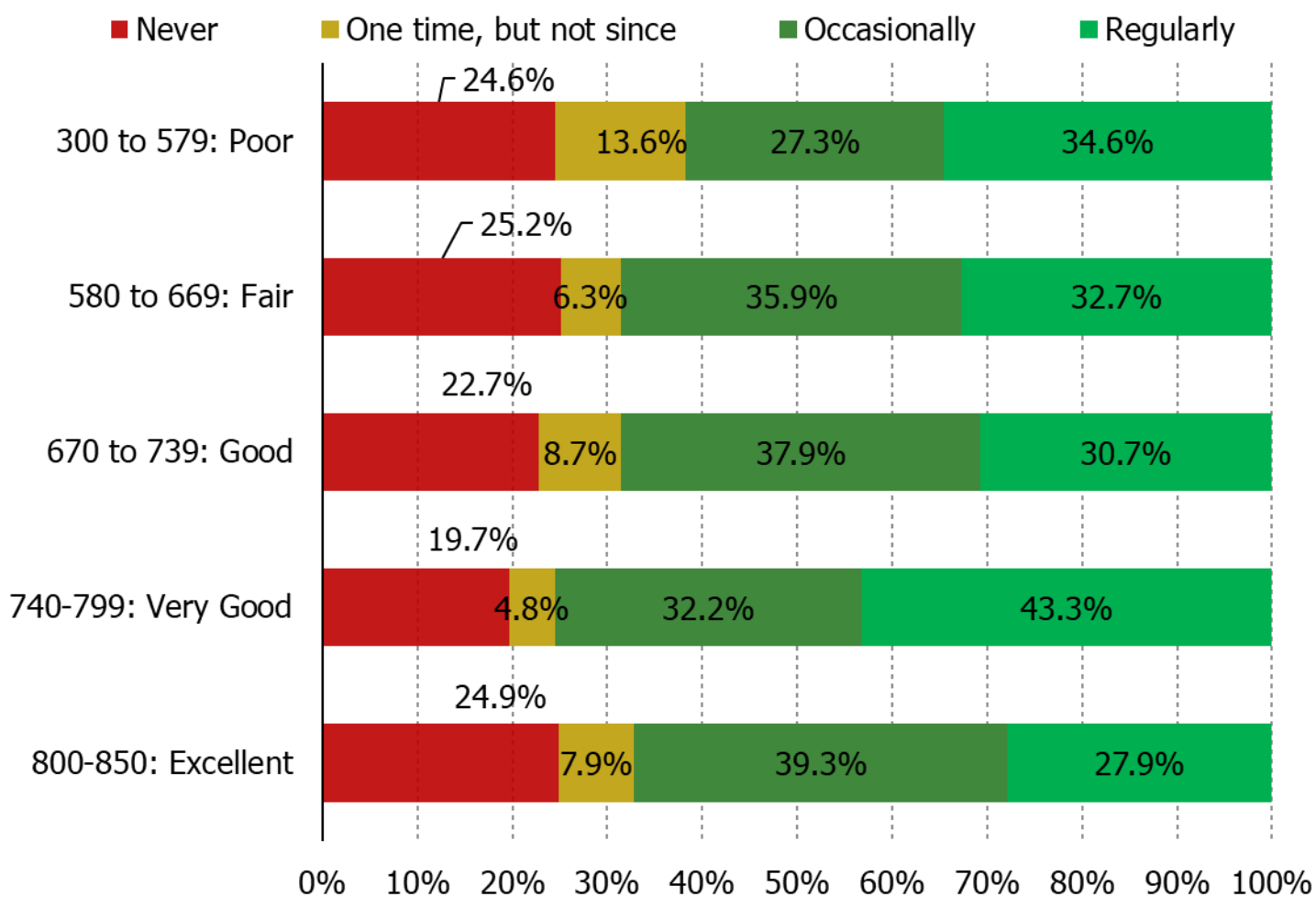


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wal-Mart – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024



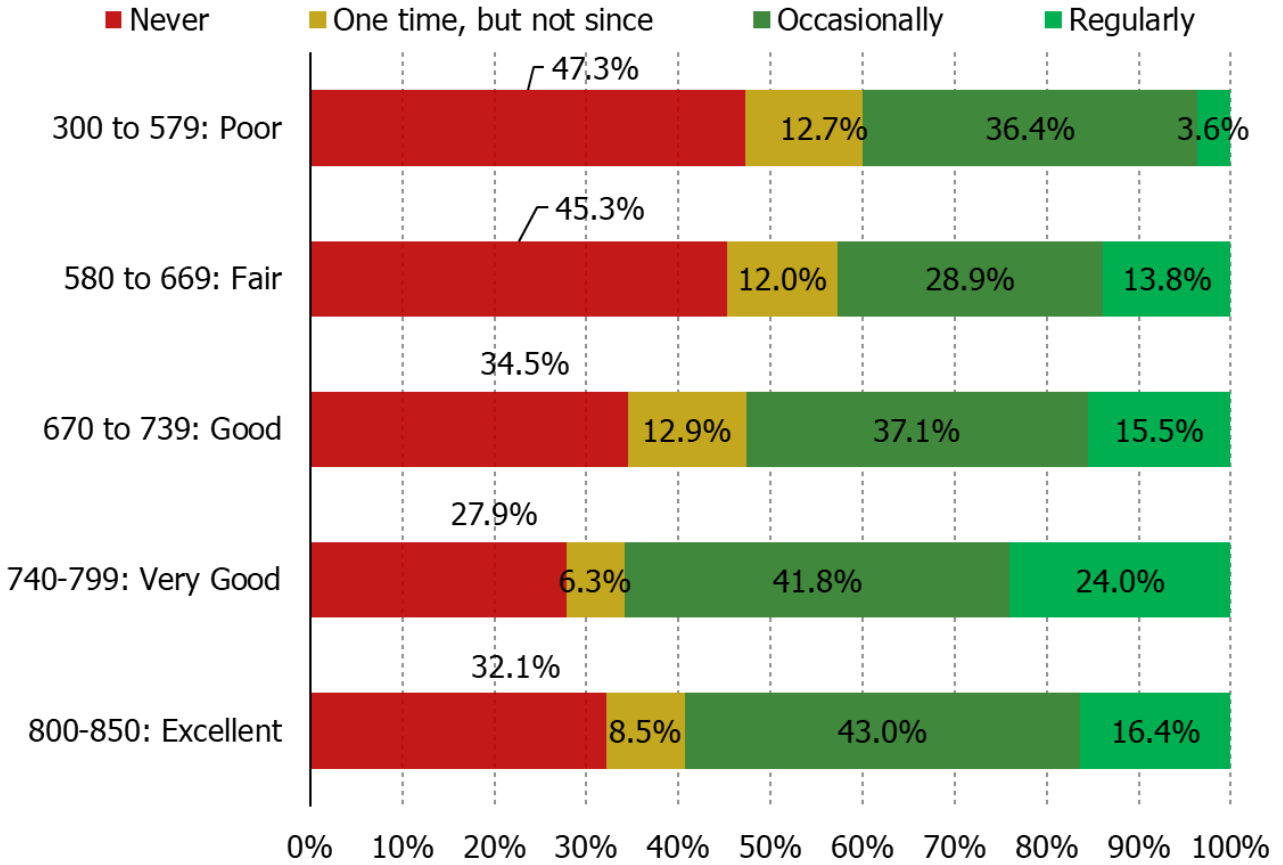
\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.



Experience with Target – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

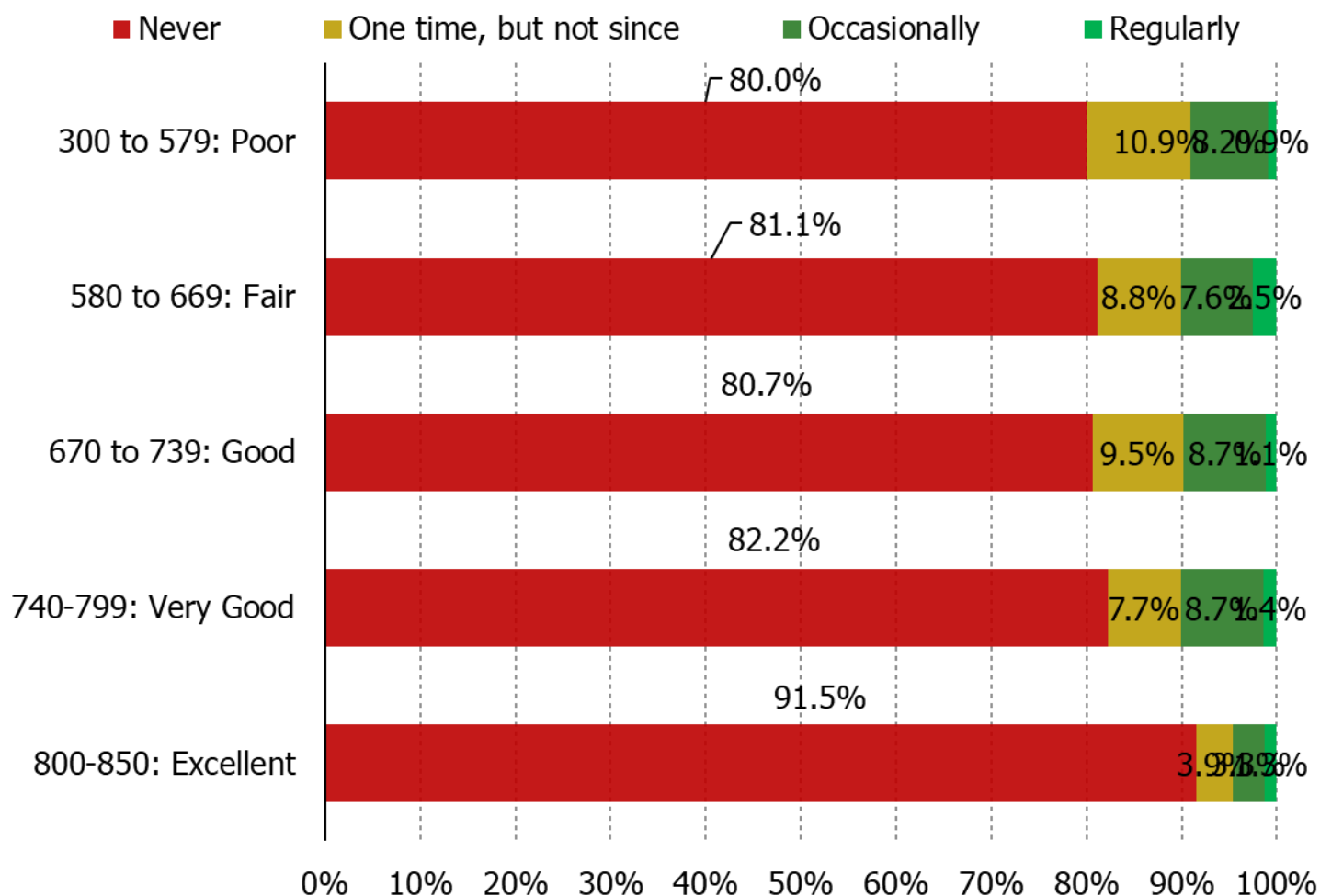


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wish.com – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

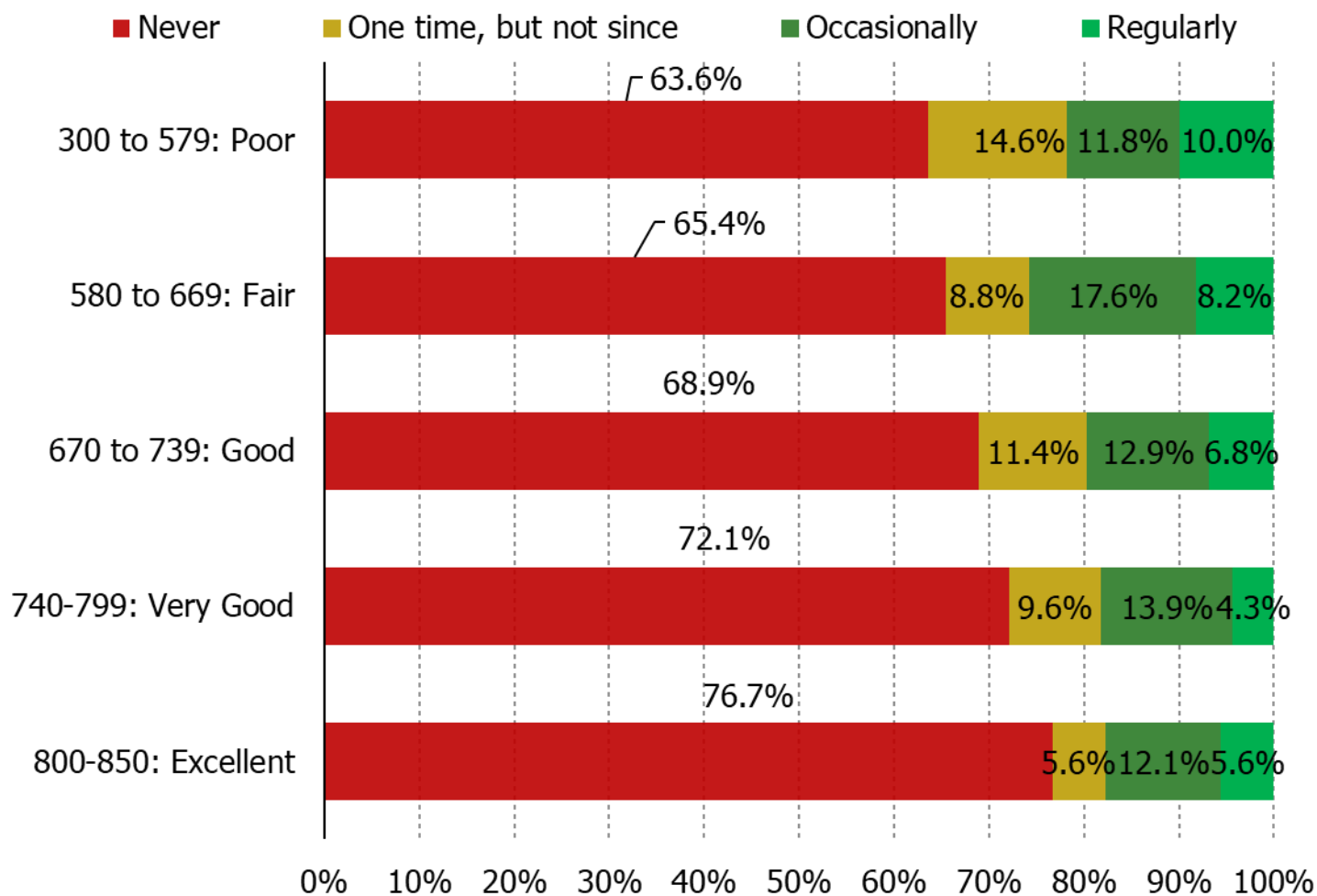


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Temu – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

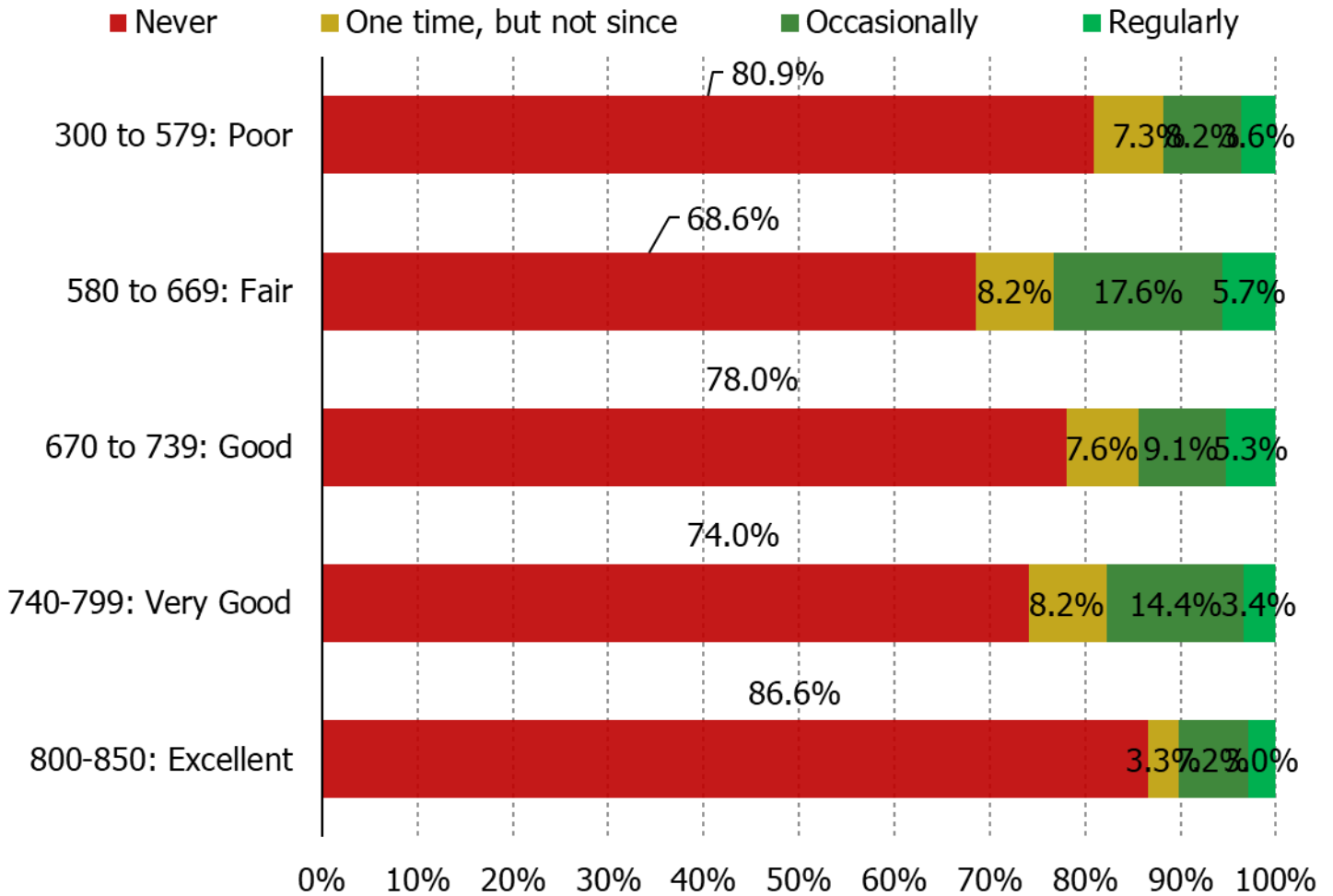


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Shein – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024

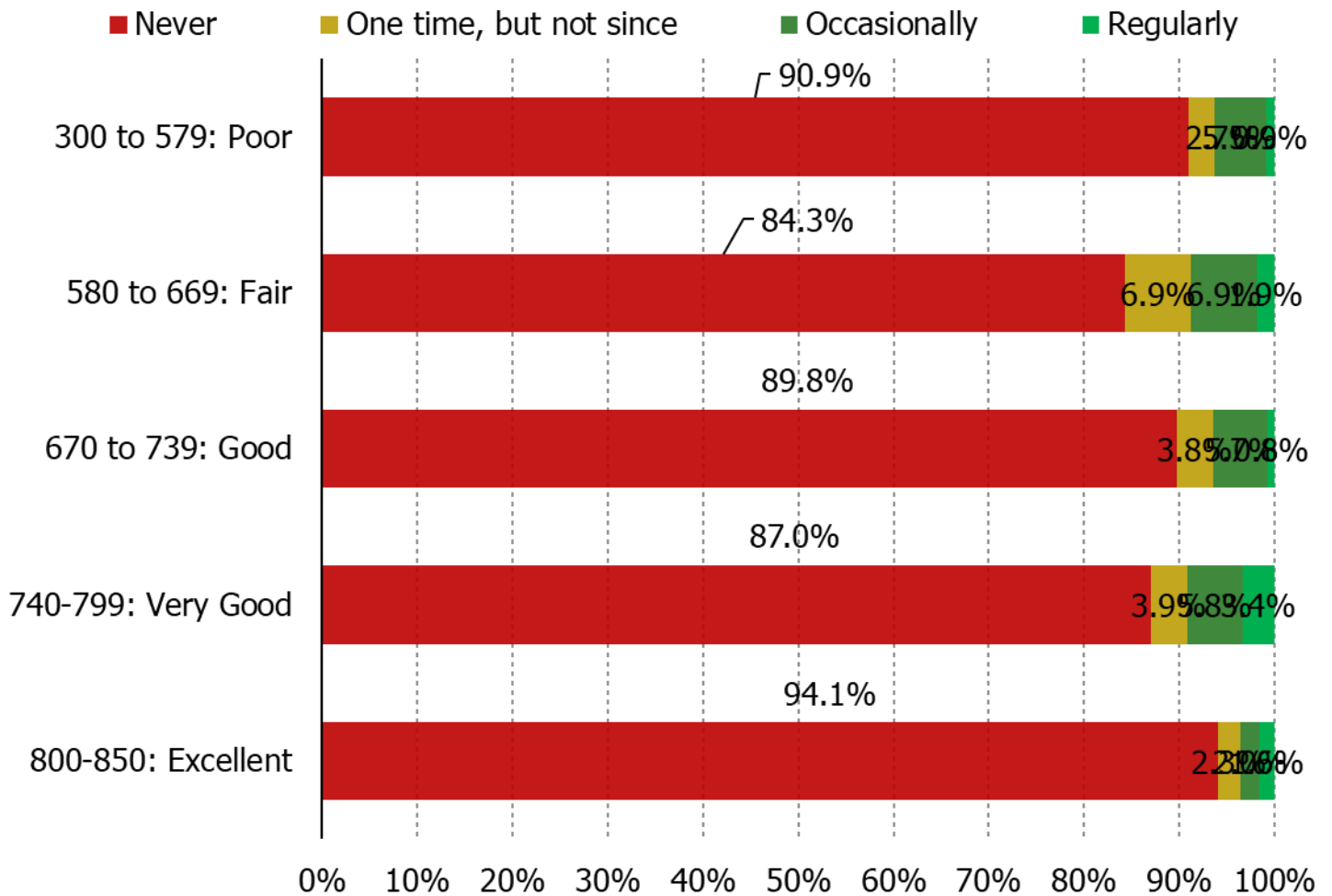


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with TikTok Shop – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2024



\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.