

Bespoke Survey Research

October 2024

Online Retailers

Volume 47 | Quarterly Survey

1,000 US Consumers Balanced To Census

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

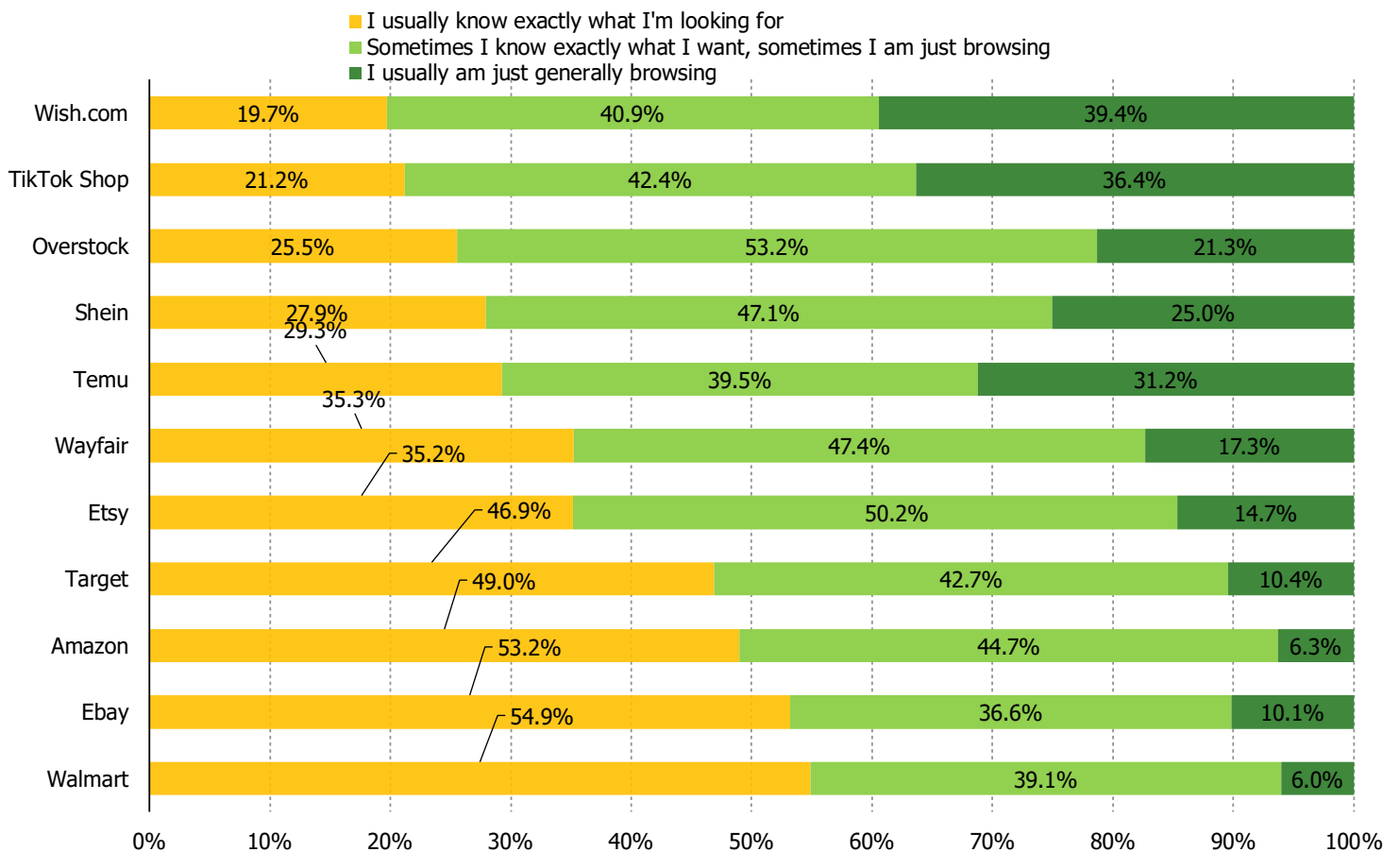
Key Takeaways:

- ❑ This quarter, we dug into consumer behavior across platforms. Broadly speaking, those who search on Amazon, Walmart, and Target usually know what they are looking for while shoppers of Wish.com, Shein, and Temu are relatively less likely to know what they are looking for and more likely to be browsing.
- ❑ Among those who have bought something on Etsy in the past three months, 20%+ said that the search experience was improved (vs. only ~5% who said it worsened).
- ❑ There is some interest in an Etsy insider program. Etsy shoppers were more open to joining an Etsy insider membership program at a free/low price point and less likely to join it at \$10-15 per month.
- ❑ On Etsy Gift Mode, both familiarity and purchases of one or more items have increased q/q.
- ❑ Consumers continue to characterize their Amazon, Walmart, and Target interactions as more regular vs. Etsy, Wayfair, and Wish.com usage is more episodic.
- ❑ Confidence in spending money has improved slightly q/q, but remains a leg lower than it was 1-2 years ago. We also continue to see increases in the share of consumers reporting declines in their personal savings.
- ❑ While Amazon continues to lead, Temu interactions continue to grow with each wave we run.
- ❑ Consumers have more trust in Amazon than any other platform, and among eCommerce platforms that we ask about, loyalty is strongest for Amazon.
- ❑ There are some interesting shopping dynamics worth looking at in the tracker section of our deck showing share of consumers shopping each platform, how many items they buy per month from each, etc.

NEW AND RECENTLY ADDED QUESTIONS

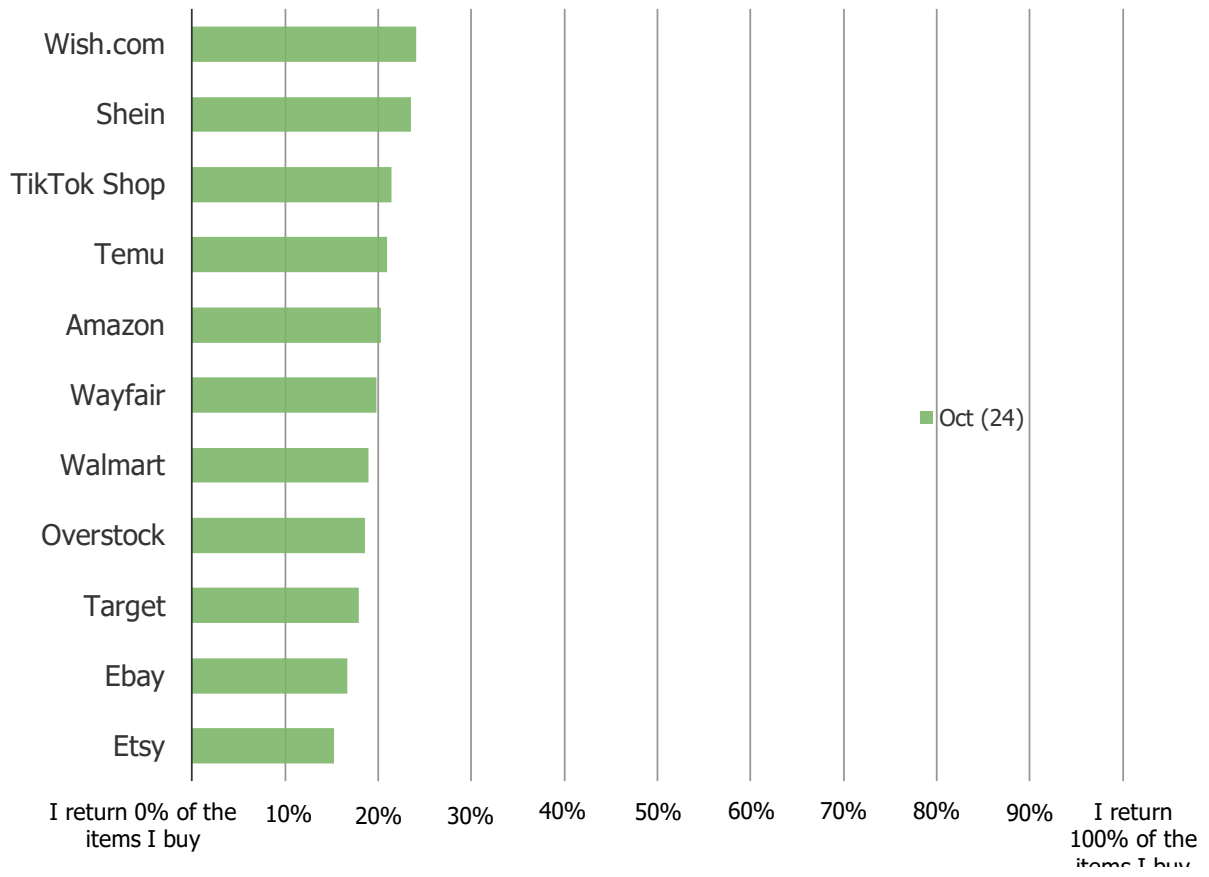
WHEN YOU SEARCH ON THESE PLATFORMS ONLINE, HOW OFTEN DO YOU KNOW EXACTLY WHAT YOU ARE LOOKING FOR VERSUS GENERALLY BROWSING?

Posed to all respondents who shop/browse the below.



HOW OFTEN DO YOU RETURN ITEMS TO THESE PLATFORMS AFTER YOU BUY THINGS ONLINE?

Posed to all respondents who shop the below.

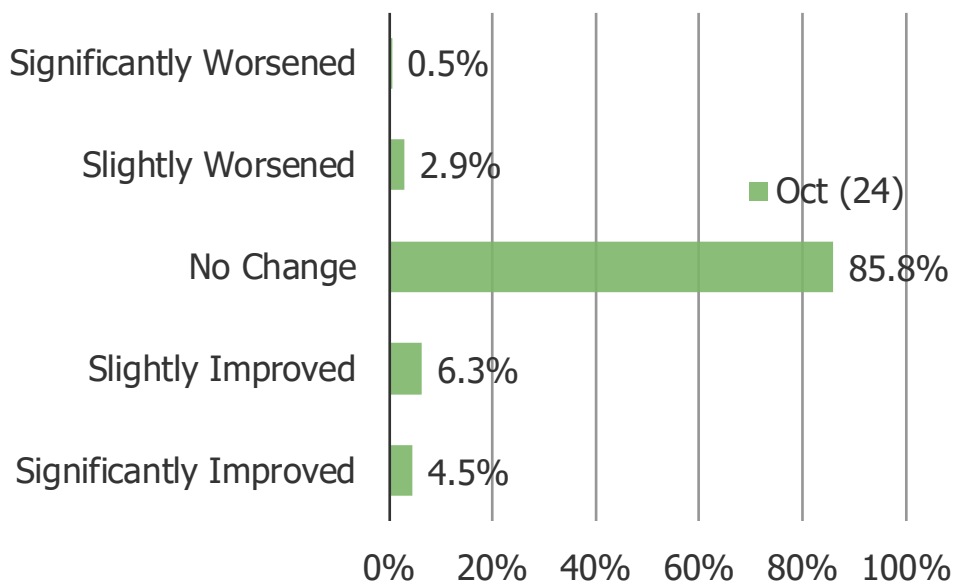


Weighted average above, full breakdown of responses below...

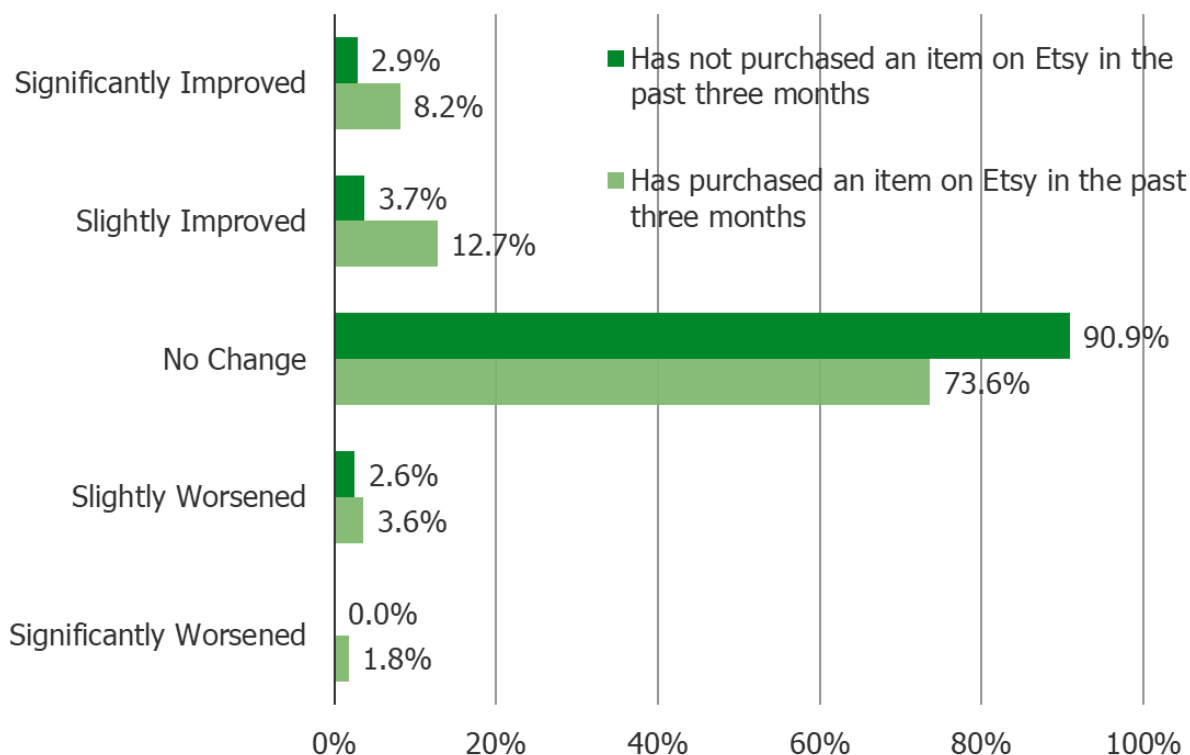
	I return 0% of the items I buy	I return 10% of the items I buy	I return 20% of the items I buy	I return 30% of the items I buy	I return 40% of the items I buy	I return 50% of the items I buy	I return 60% of the items I buy	I return 70% of the items I buy	I return 80% of the items I buy	I return 90% of the items I buy	I return 100% of the items I buy	N Size
Amazon	45.1%	36.0%	8.5%	4.7%	1.4%	2.0%	0.4%	0.6%	0.1%	0.2%	1.2%	861
Walmart	57.1%	26.3%	7.2%	3.2%	1.2%	2.0%	0.8%	0.5%	0.4%	0.3%	1.1%	752
Target	59.3%	26.3%	7.3%	1.8%	1.1%	1.6%	0.5%	0.7%	0.5%	0.0%	0.9%	562
Shein	61.1%	13.1%	4.0%	6.9%	2.9%	4.0%	2.3%	1.1%	1.1%	2.3%	1.1%	175
Wish.com	62.5%	13.9%	5.6%	1.4%	0.0%	5.6%	4.2%	2.8%	1.4%	1.4%	1.4%	72
Temu	63.3%	16.7%	5.3%	3.0%	2.3%	2.7%	2.3%	1.1%	1.9%	0.8%	0.8%	264
Wayfair	65.1%	17.1%	6.9%	2.9%	0.6%	1.7%	0.6%	1.1%	1.1%	1.1%	1.7%	175
Overstock	65.3%	20.0%	5.3%	2.1%	1.1%	2.1%	0.0%	2.1%	1.1%	0.0%	1.1%	95
TikTok Shop	71.0%	12.0%	2.0%	3.0%	2.0%	2.0%	1.0%	1.0%	0.0%	3.0%	3.0%	100
Ebay	73.5%	16.0%	2.3%	1.8%	0.5%	3.0%	0.7%	0.5%	0.7%	0.5%	0.7%	437
Etsy	79.7%	10.9%	2.9%	1.5%	1.1%	1.1%	1.1%	0.4%	0.4%	0.0%	1.1%	276

HAVE YOU NOTICED ANY CHANGES RECENTLY TO THE EXPERIENCE OF SEARCHING FOR ITEMS ON THE ETSY SITE OR APP?

Posed to all respondents who ever use or visit Etsy.



Cross-tabbing the above by if they have shopped Etsy in the past three months or not...

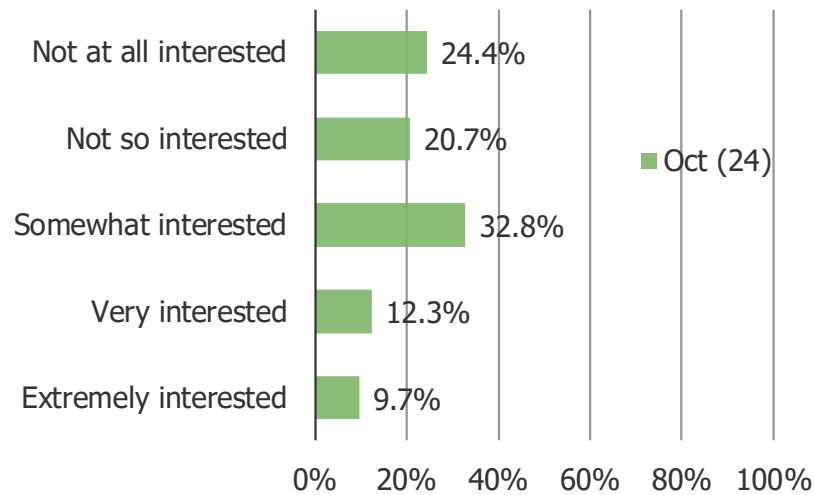


HOW MUCH INTEREST WOULD YOU HAVE IN JOINING AN ETSY INSIDER MEMBERSHIP PROGRAM?

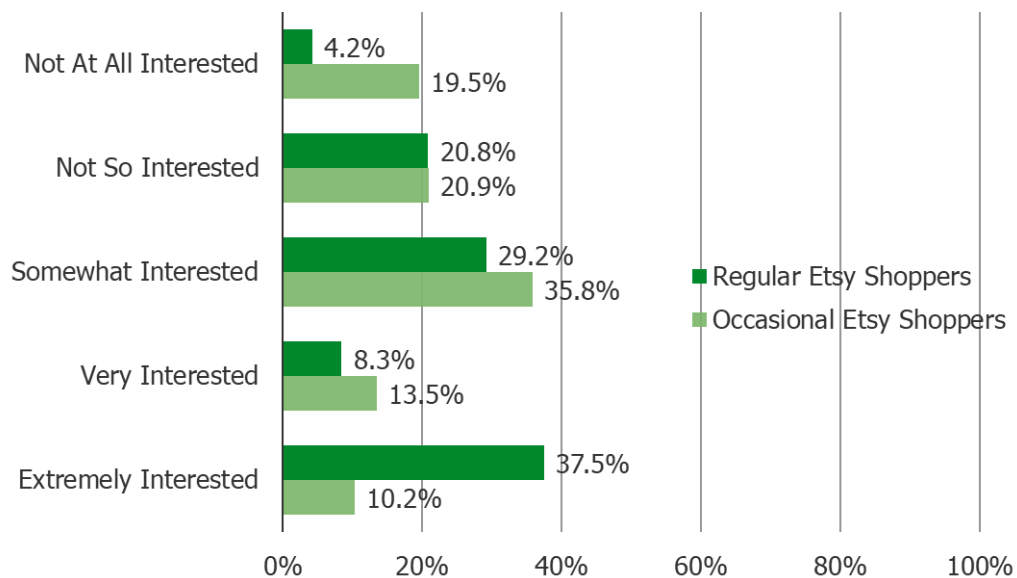
BENEFITS OF THIS PROGRAM MIGHT INCLUDE:

- FREE US DOMESTIC SHIPPING ON MILLIONS OF ITEMS
- A BIRTHDAY BONUS
- A LIMITED EDITION ANNUAL GIFT, DESIGNED BY AN ETSY SELLER
- FIRST ACCESS TO SPECIAL DISCOUNTS AND SELECT MERCHANDISE
- DOUBLE IMPACT WITH DONATE THE CHANGE

Posed to all respondents who ever use or visit Etsy.

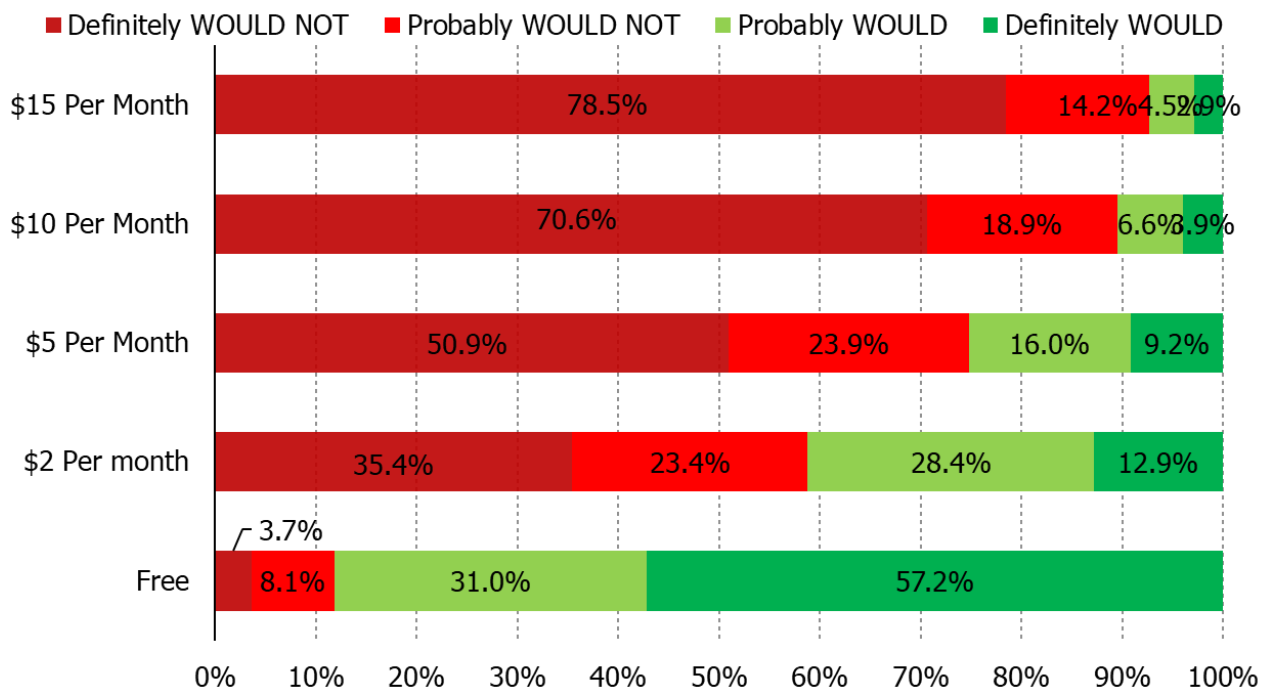


Cross tabbing the data above...

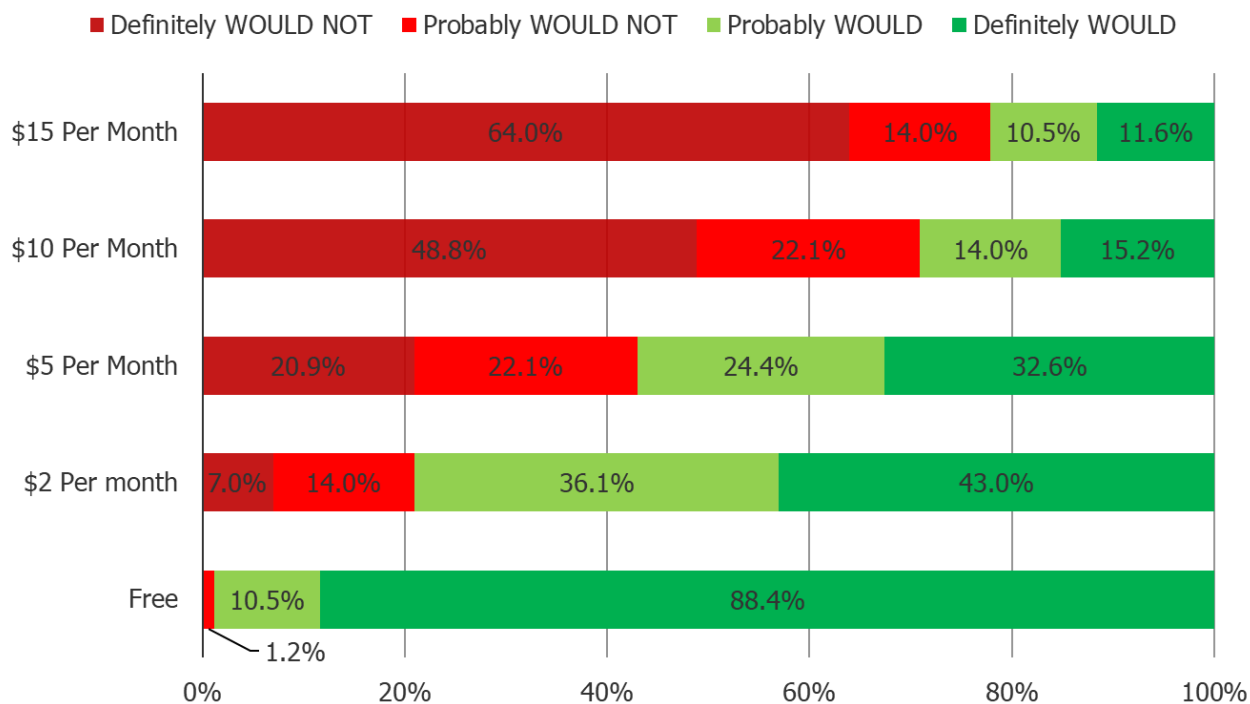


HOW LIKELY WOULD YOU BE TO JOIN AN ETSY INSIDER MEMBERSHIP PROGRAM AT THE FOLLOWING COSTS...

Posed to all respondents who ever use or visit Etsy.

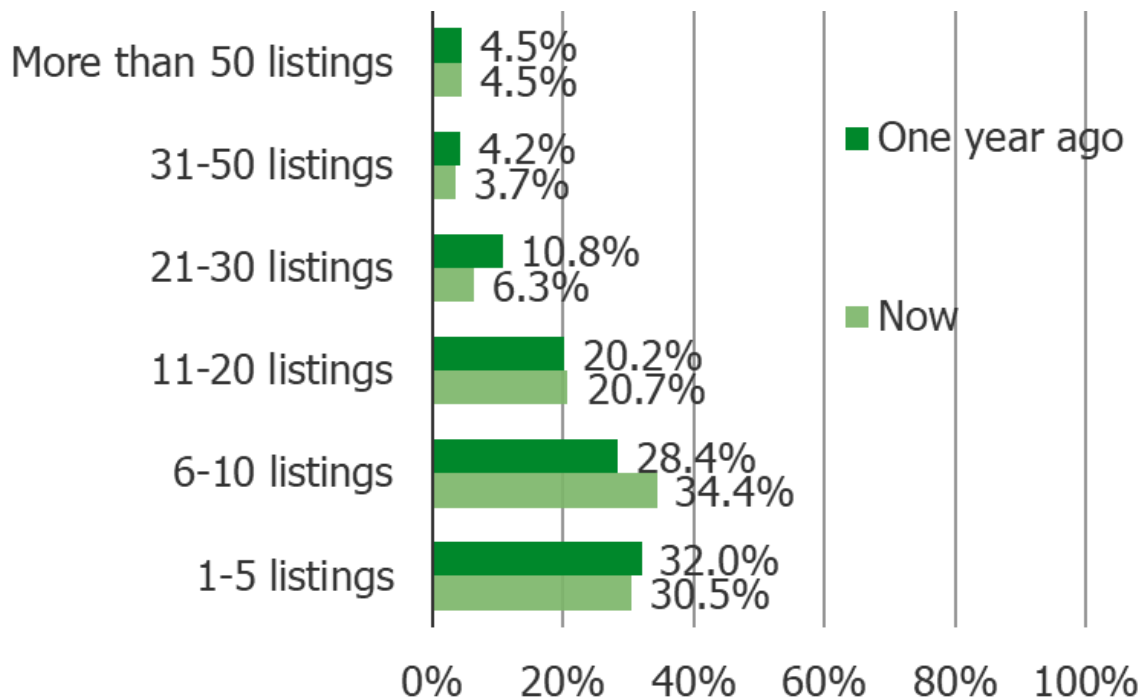
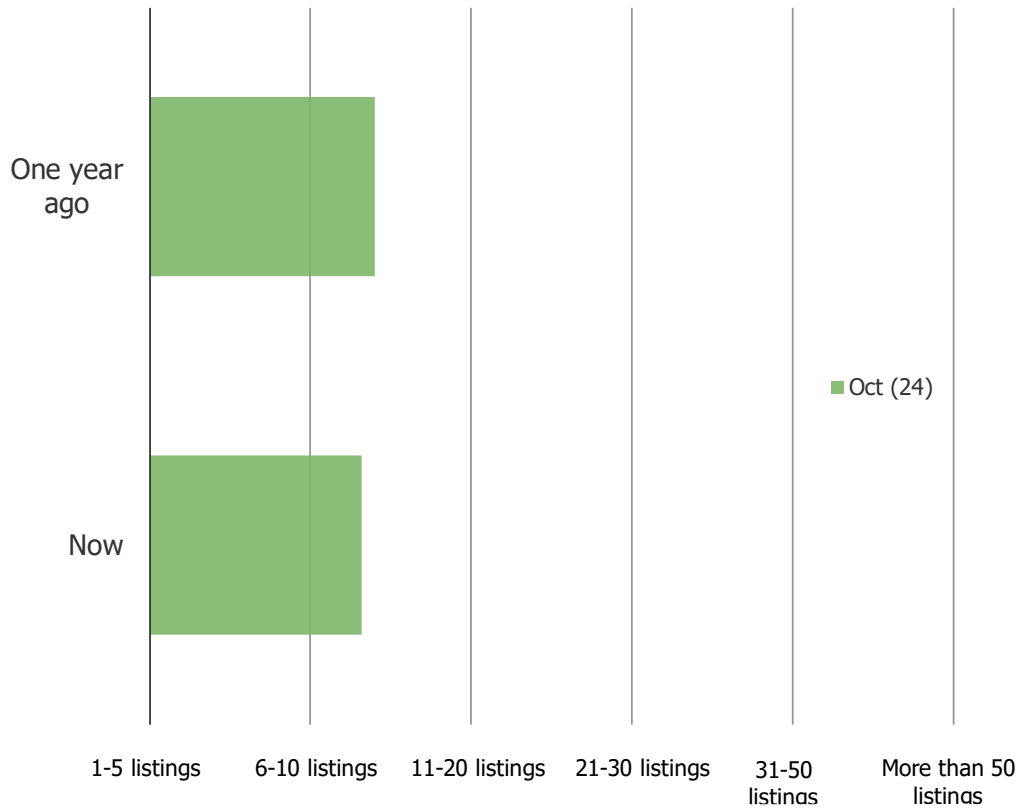


Posed to Etsy customers who said they would be very interested or extremely interested...



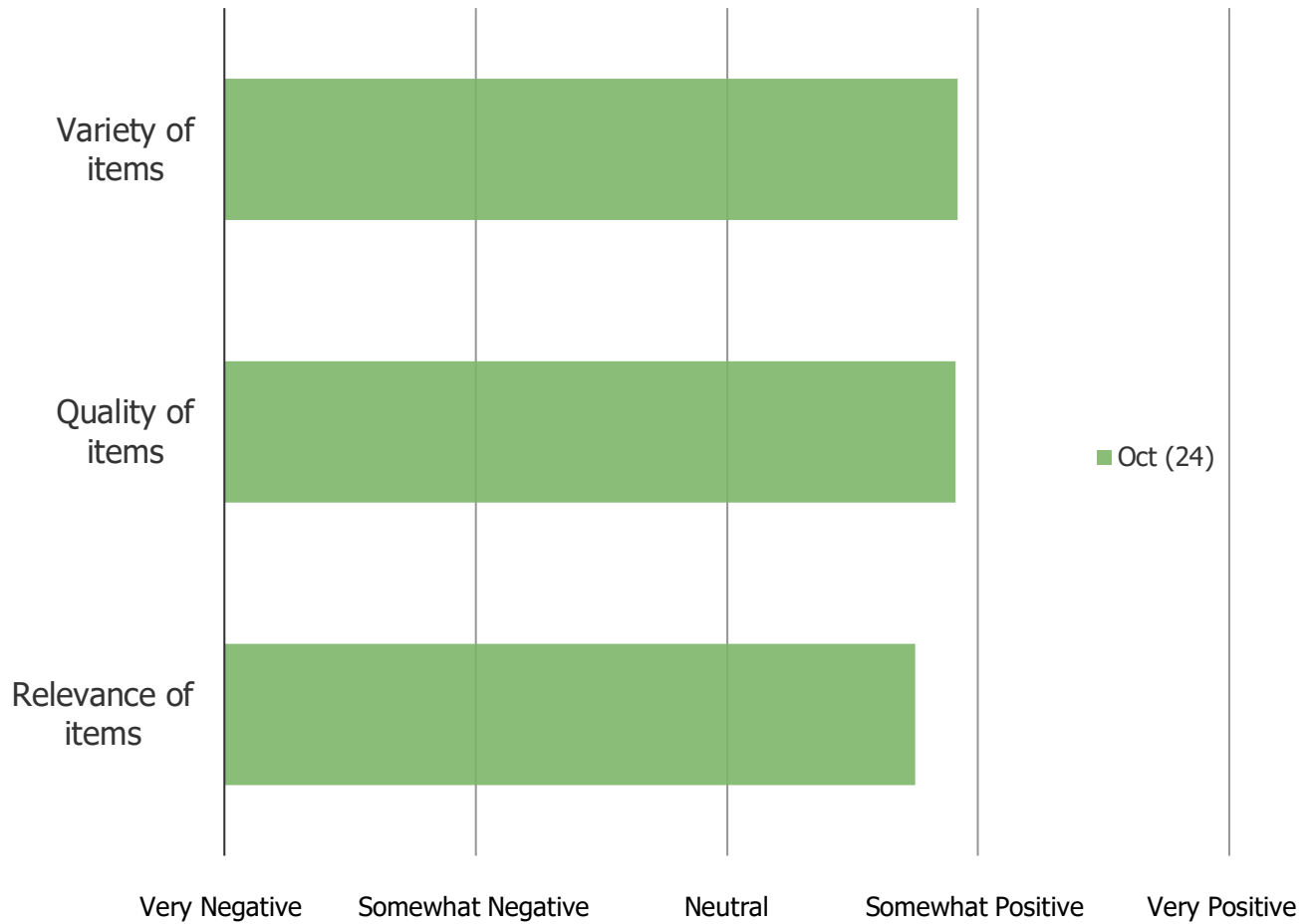
HOW MANY LISTINGS WOULD YOU ESTIMATE YOU NEED TO LOOK THROUGH WHEN YOU SEARCH FOR ITEMS ON ETSY BEFORE YOU FIND WHAT YOU WERE LOOKING FOR?

Posed to all respondents who ever use or visit Etsy.



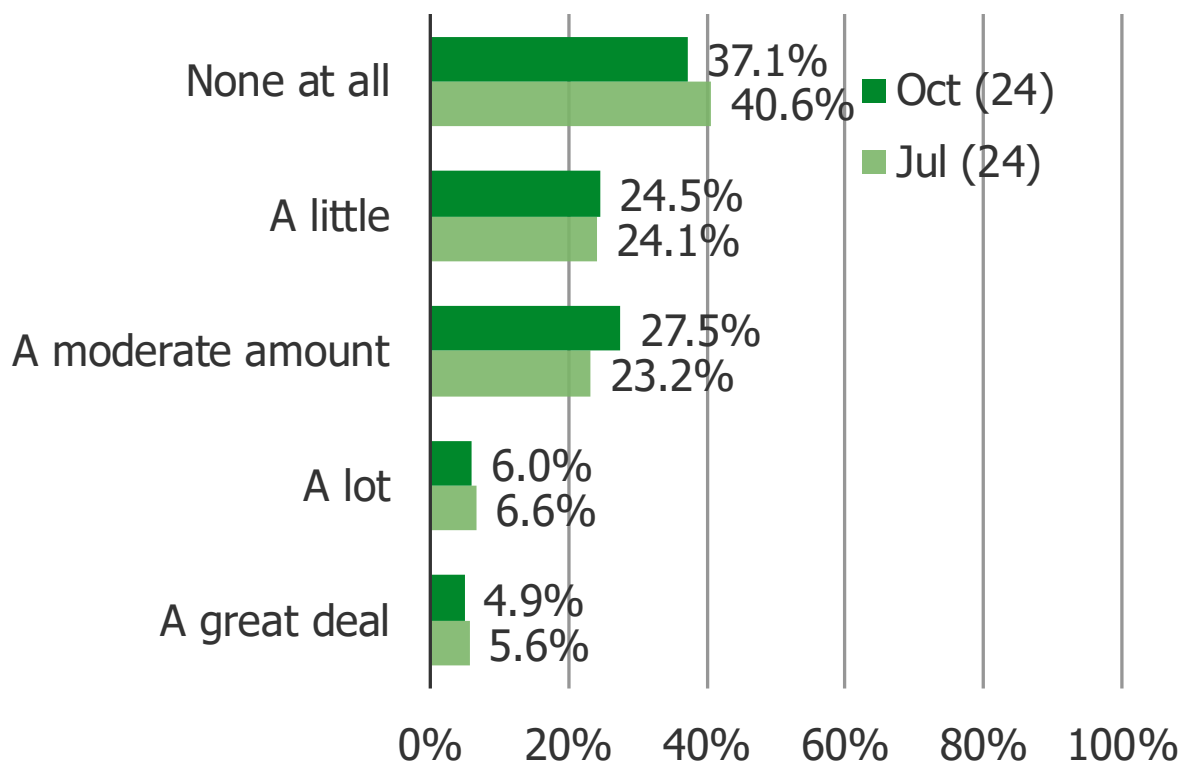
WHAT IS YOUR OPINION OF THE FOLLOWING WHEN SEARCHING FOR ITEMS ON ETSY?

Posed to all respondents who ever use or visit Etsy.

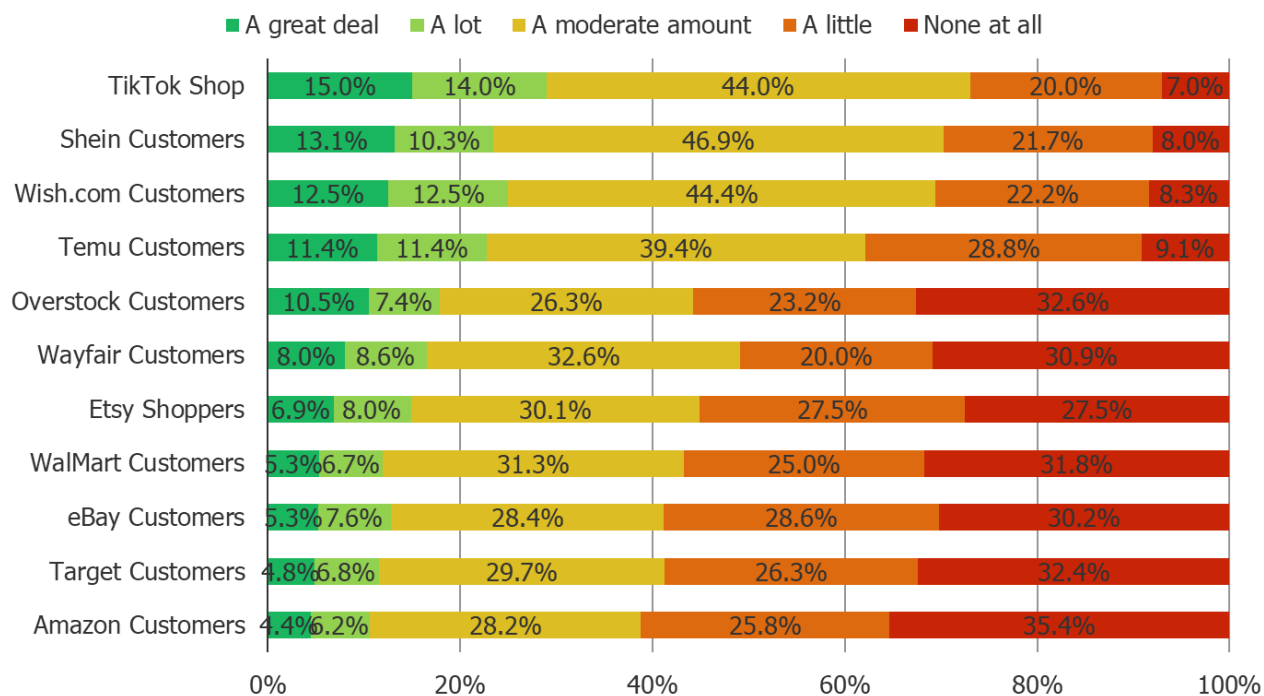


HOW MUCH USE DO YOU HAVE IN GENERAL FOR WEBSITES OR APPS THAT SELL CHEAP GOODS AND SHIP FROM WAREHOUSES IN CHINA DIRECTLY TO YOU IN THE US?

Posed to all respondents

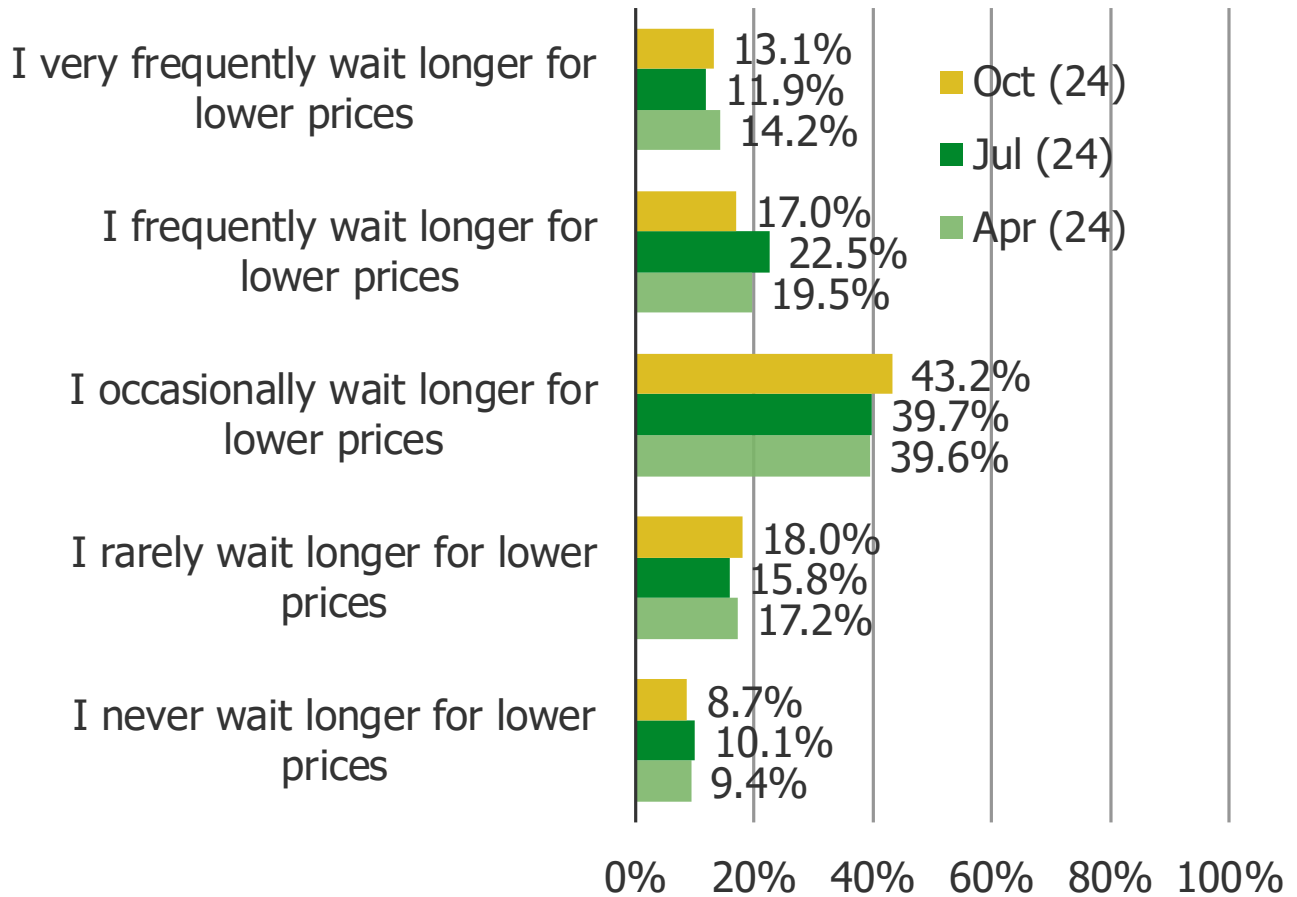


Cross-tabbing the above chart...



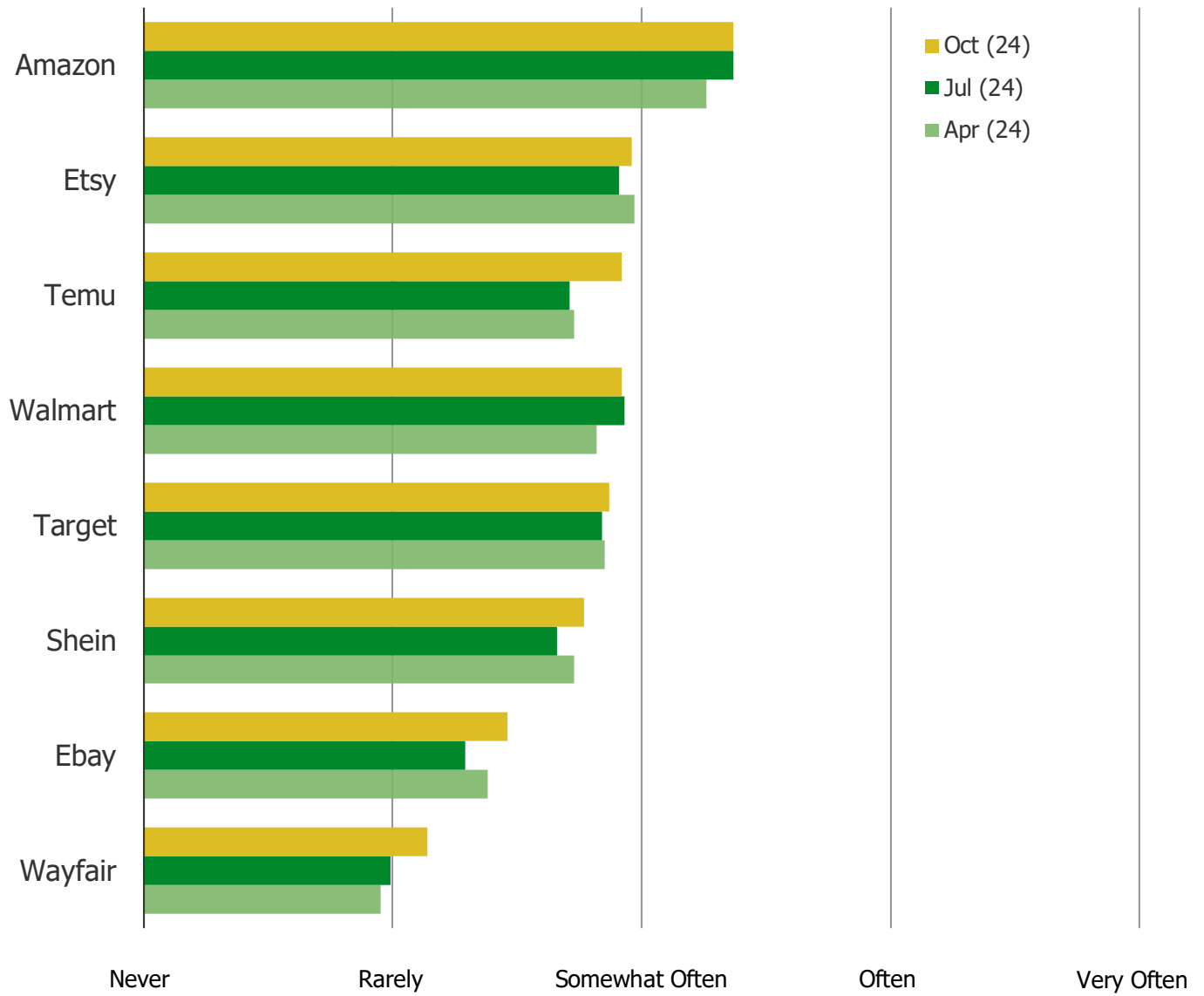
WHEN YOU SHOP ONLINE, HOW DO YOU THINK ABOUT THE TRADEOFF BETWEEN PRICE AND DELIVERY SPEED?

Posed to all respondents.



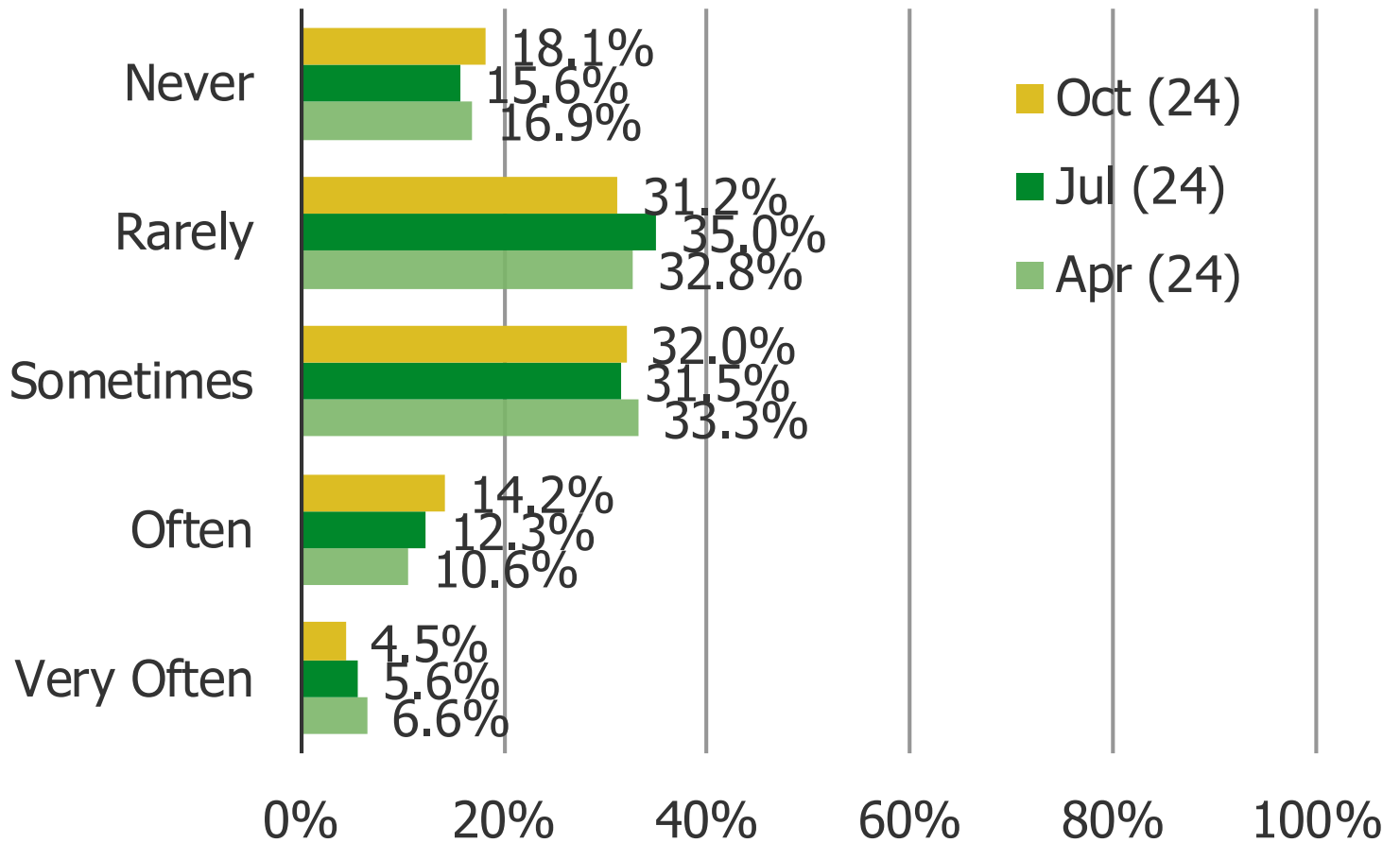
HOW OFTEN DO YOU BUY GIFTS FOR OTHERS THROUGH THIS PLATFORM?

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



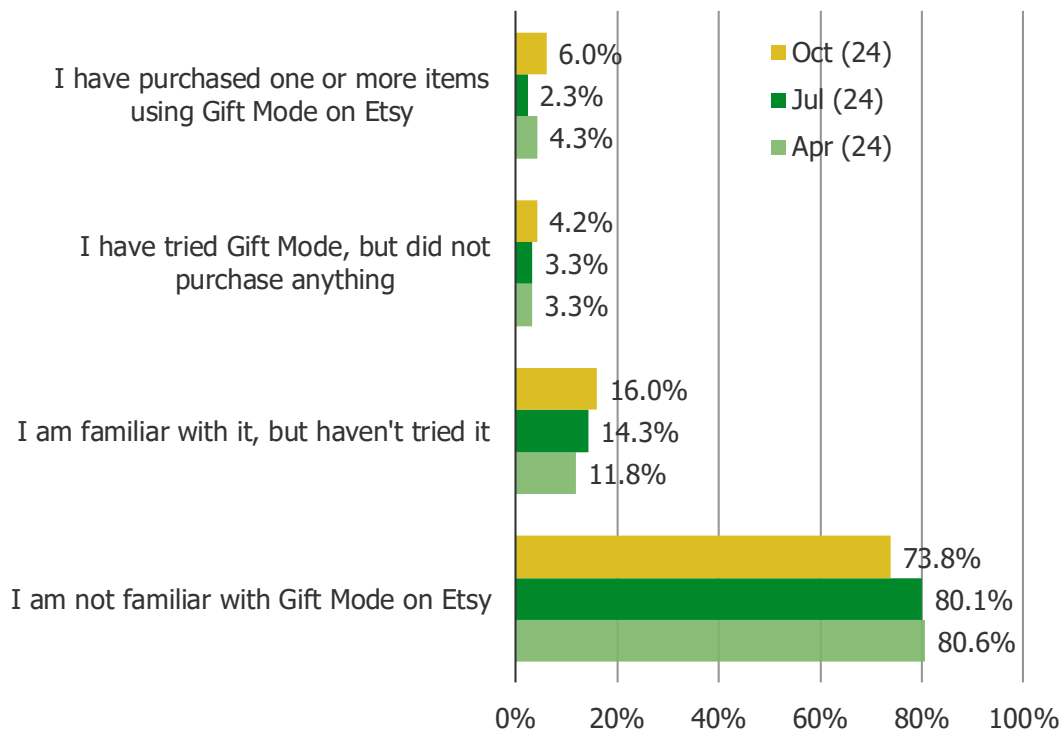
HOW OFTEN DO YOU USE ETSY TO BUY GIFTS FOR OTHERS?

Posed to all respondents who have shopped Etsy.

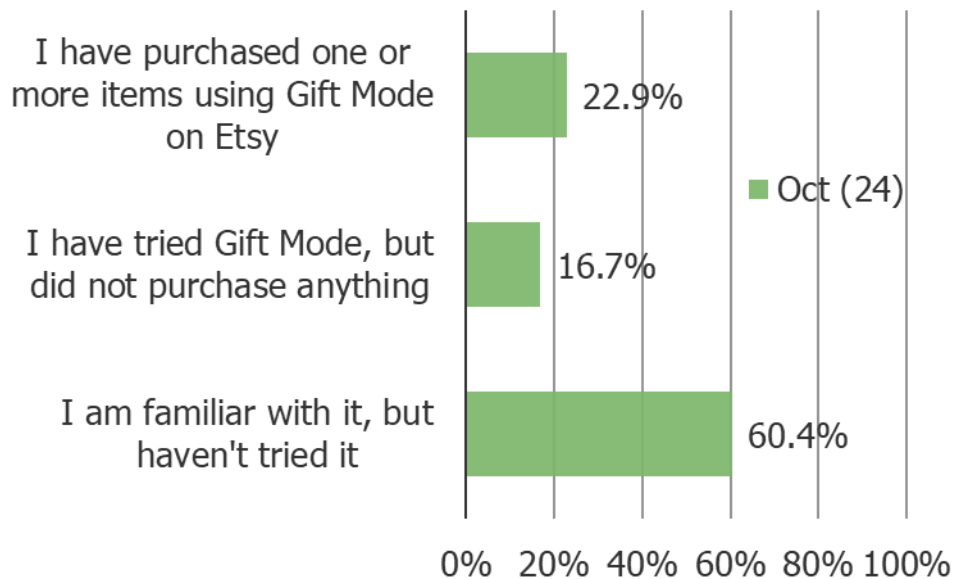


HAVE YOU TRIED GIFT MODE ON ETSY?

Posed to all respondents who have shopped Etsy.

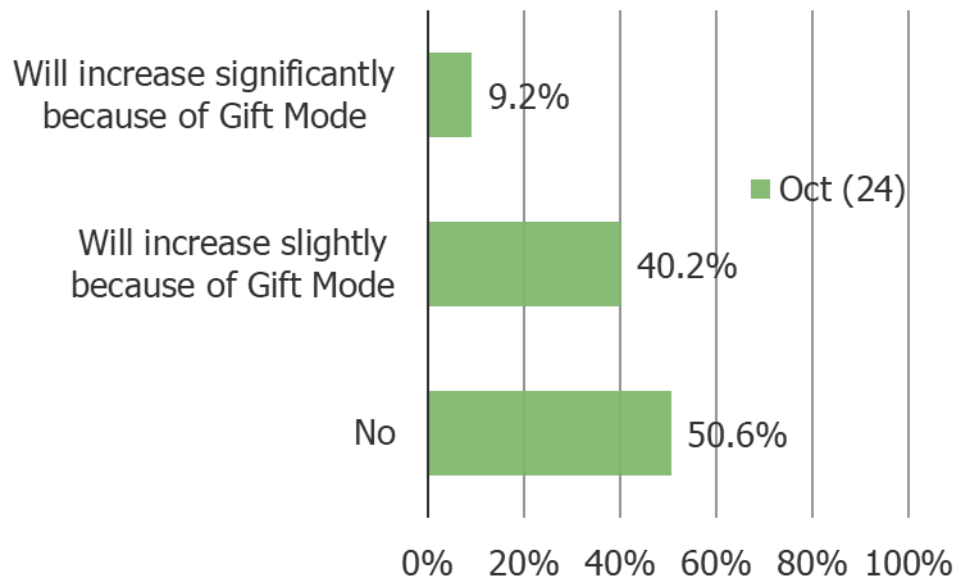


Posed to all respondents who have shopped Etsy (factoring out people who aren't aware of Gift Mode on Etsy).



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

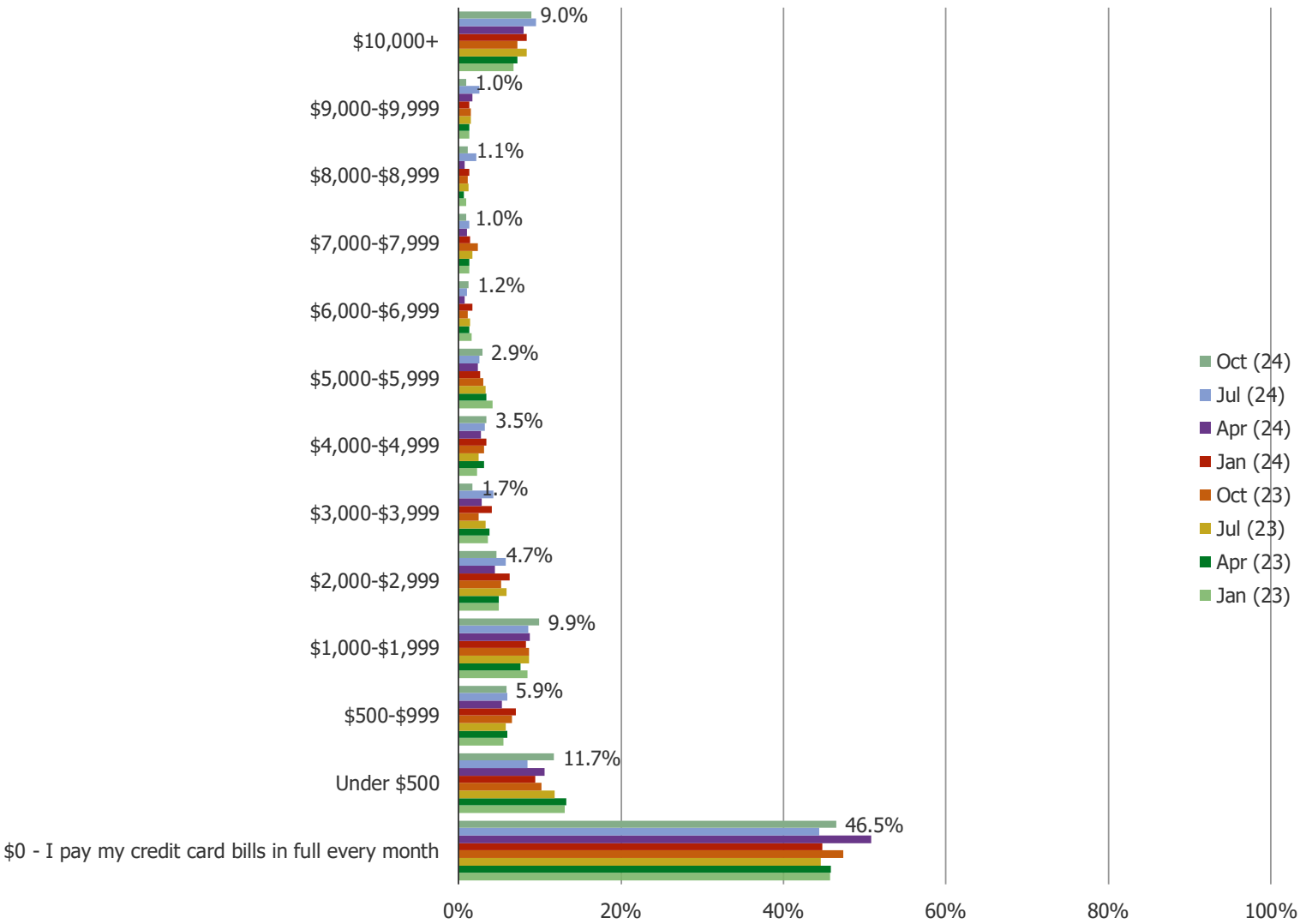
Posed to all respondents who are at least familiar with Gift Mode on Etsy (N = 251).



Combining all waves to date to achieve a larger N size.

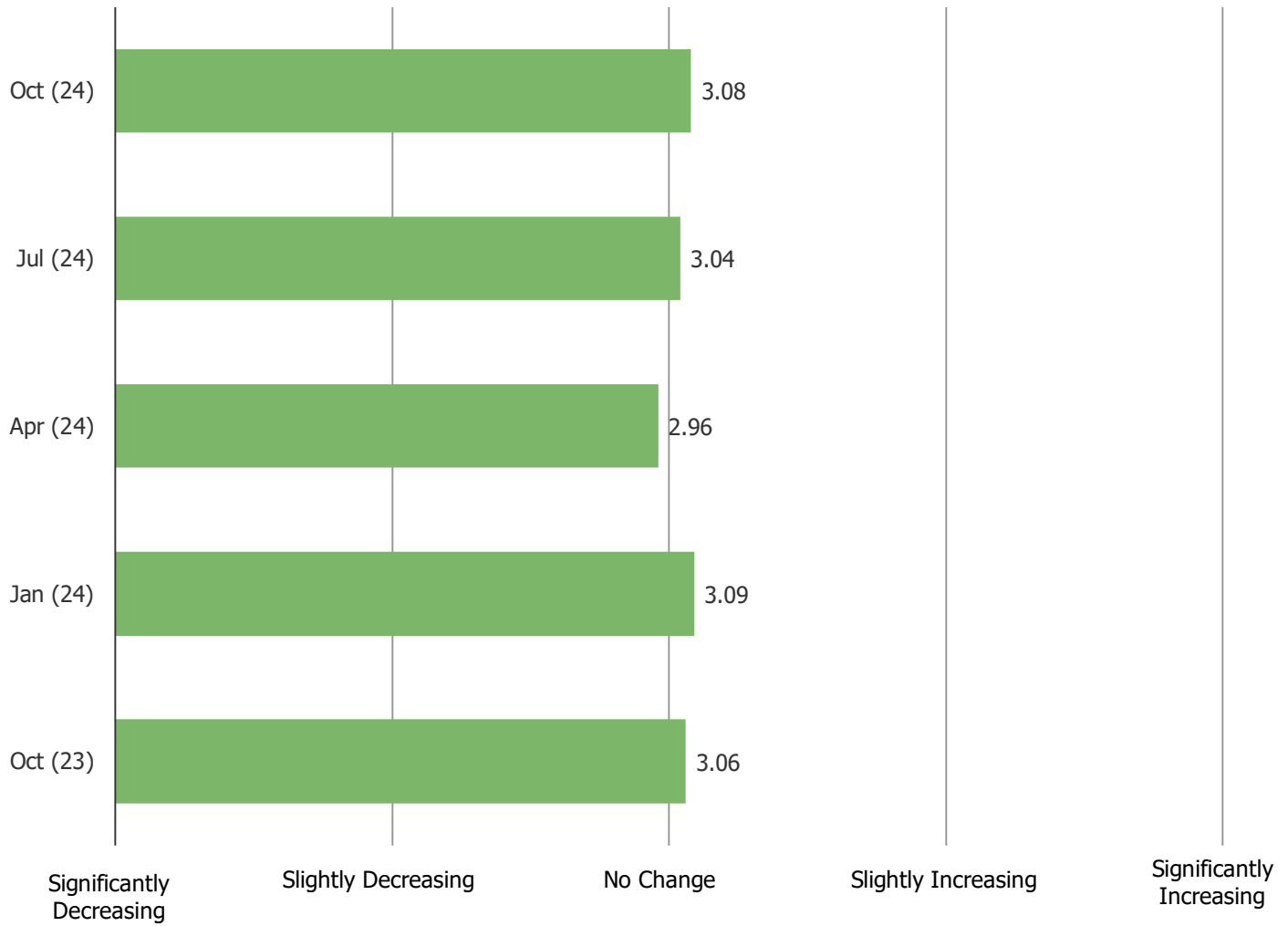
HOW MUCH CREDIT CARD DEBT DO YOU HAVE? IE – HOW MUCH OF AN OUTSTANDING BALANCE DO YOU CARRY OVER FROM MONTH TO MONTH?

Posed to all respondents.



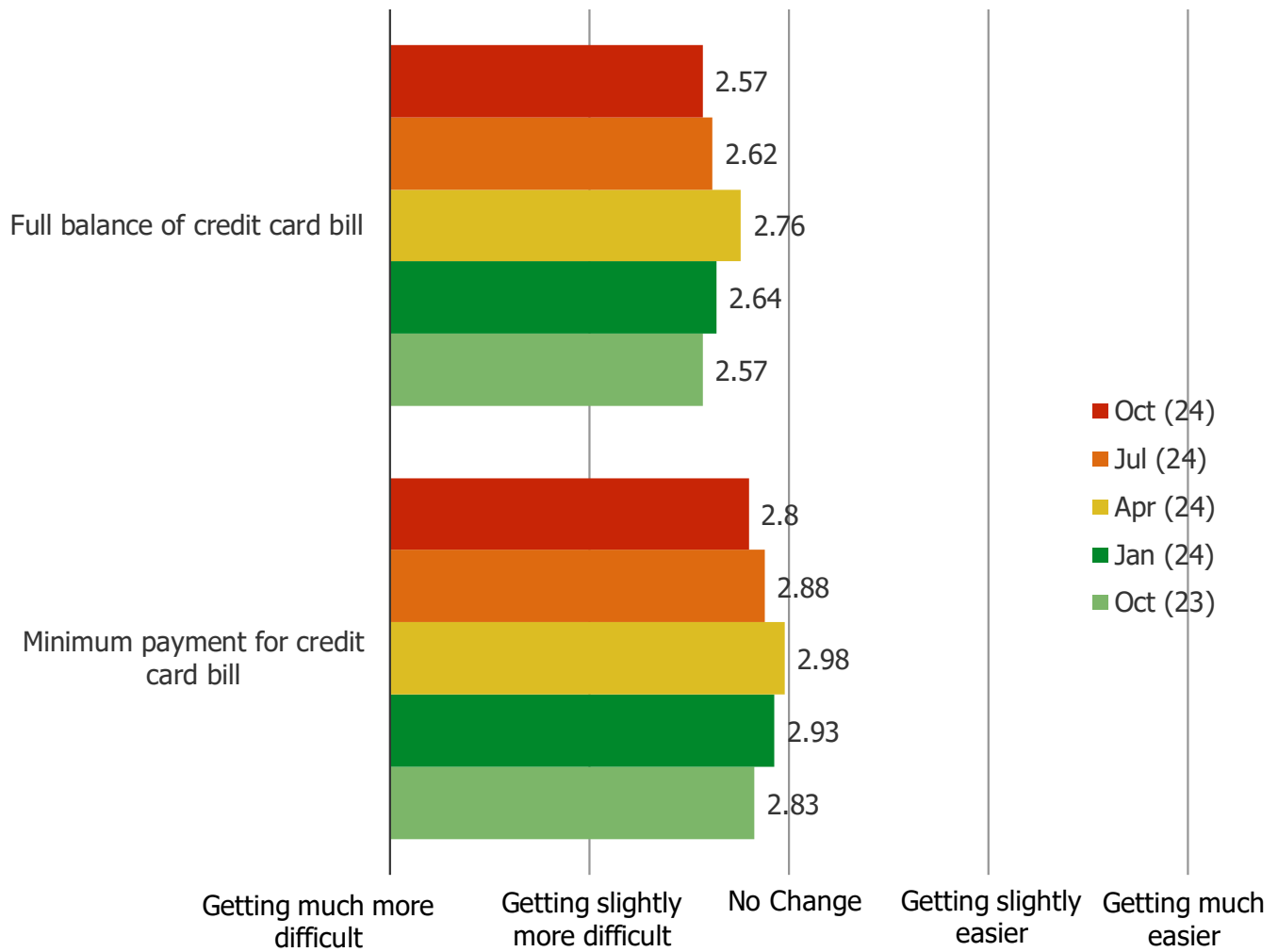
HAS THE AMOUNT OF CREDIT CARD DEBT THAT YOU HAVE BEEN INCREASING OR DECREASING OVER THE PAST 12 MONTHS?

Posed to all respondents.



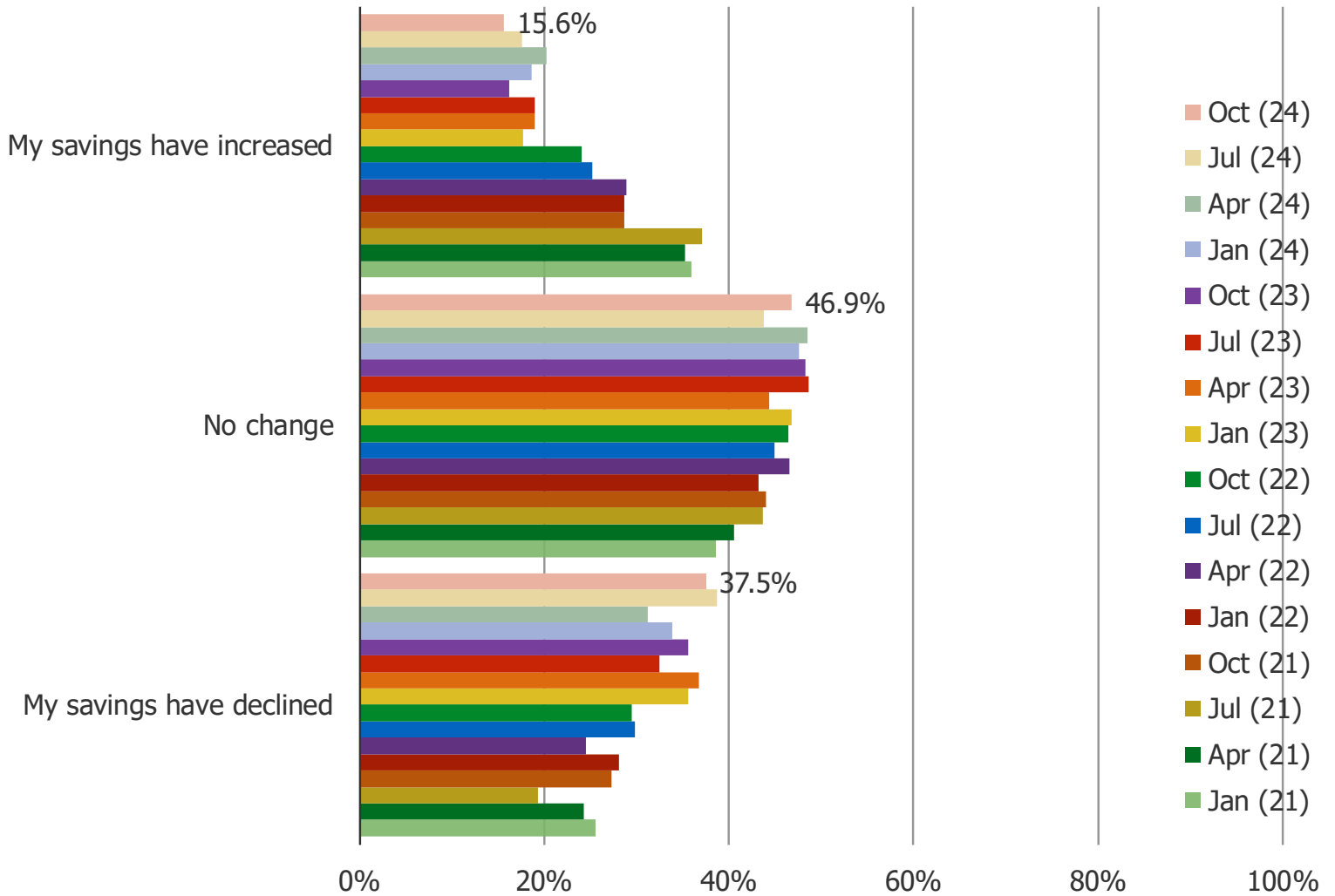
IS IT GETTING EASIER OR MORE DIFFICULT TO PAY THE FOLLOWING EACH MONTH...

Posed to all respondents.



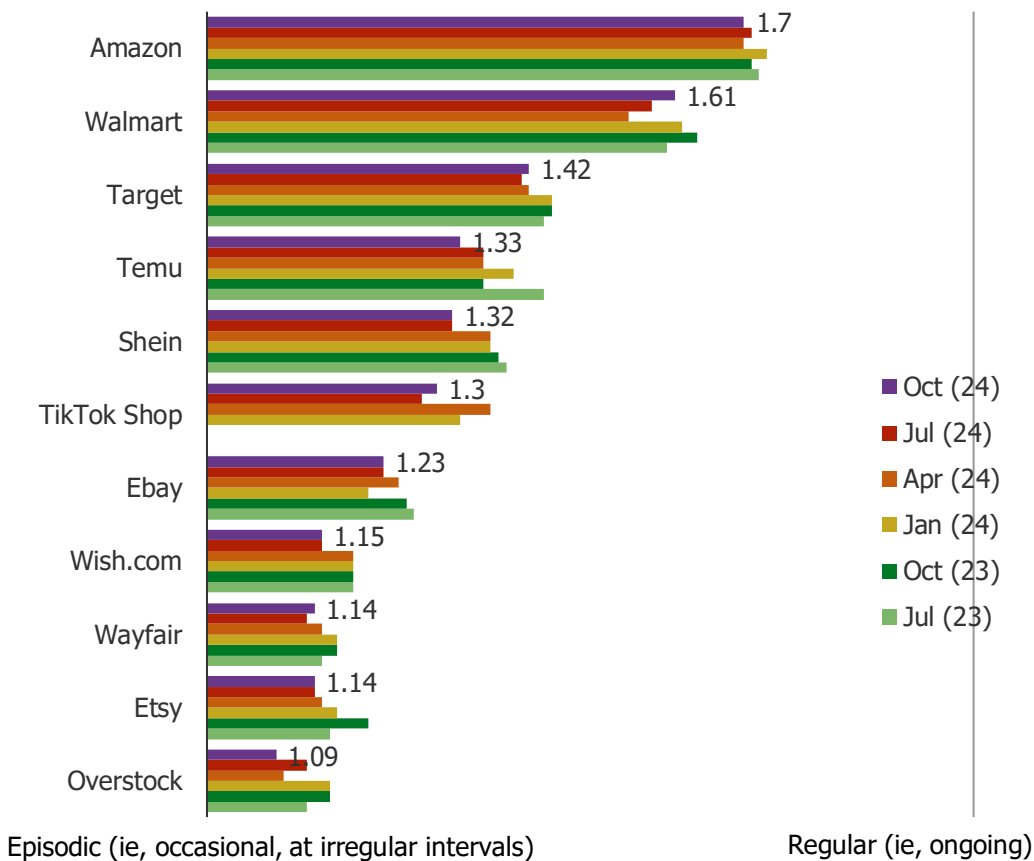
TO THE BEST OF YOUR ESTIMATION, DID THE AMOUNT OF MONEY YOU HAVE SAVED CHANGE SINCE THE START OF THE COVID-19 PANDEMIC?

Posed to all respondents.

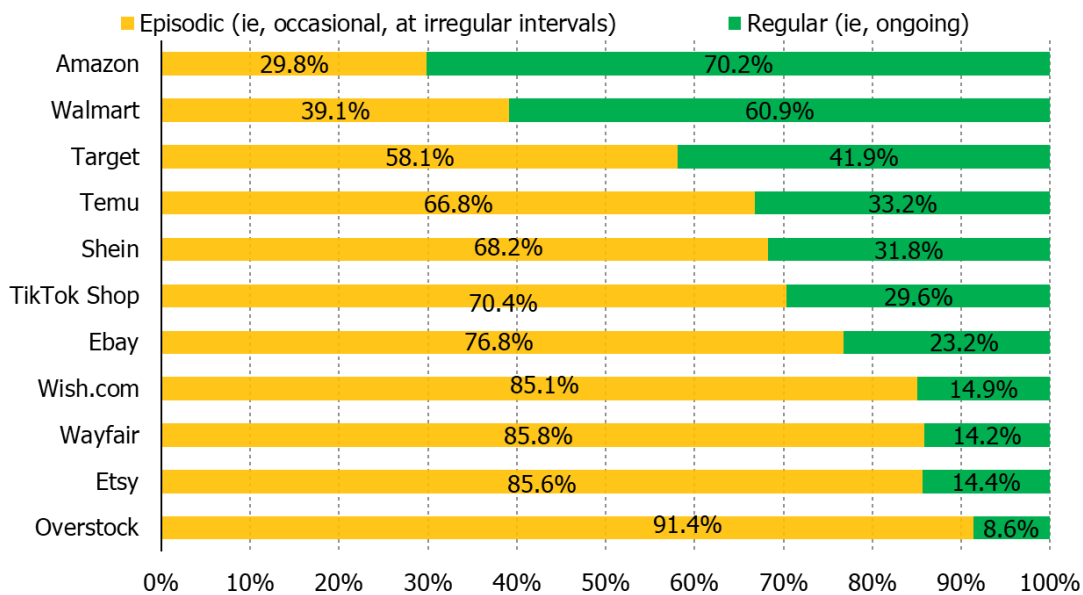


WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.



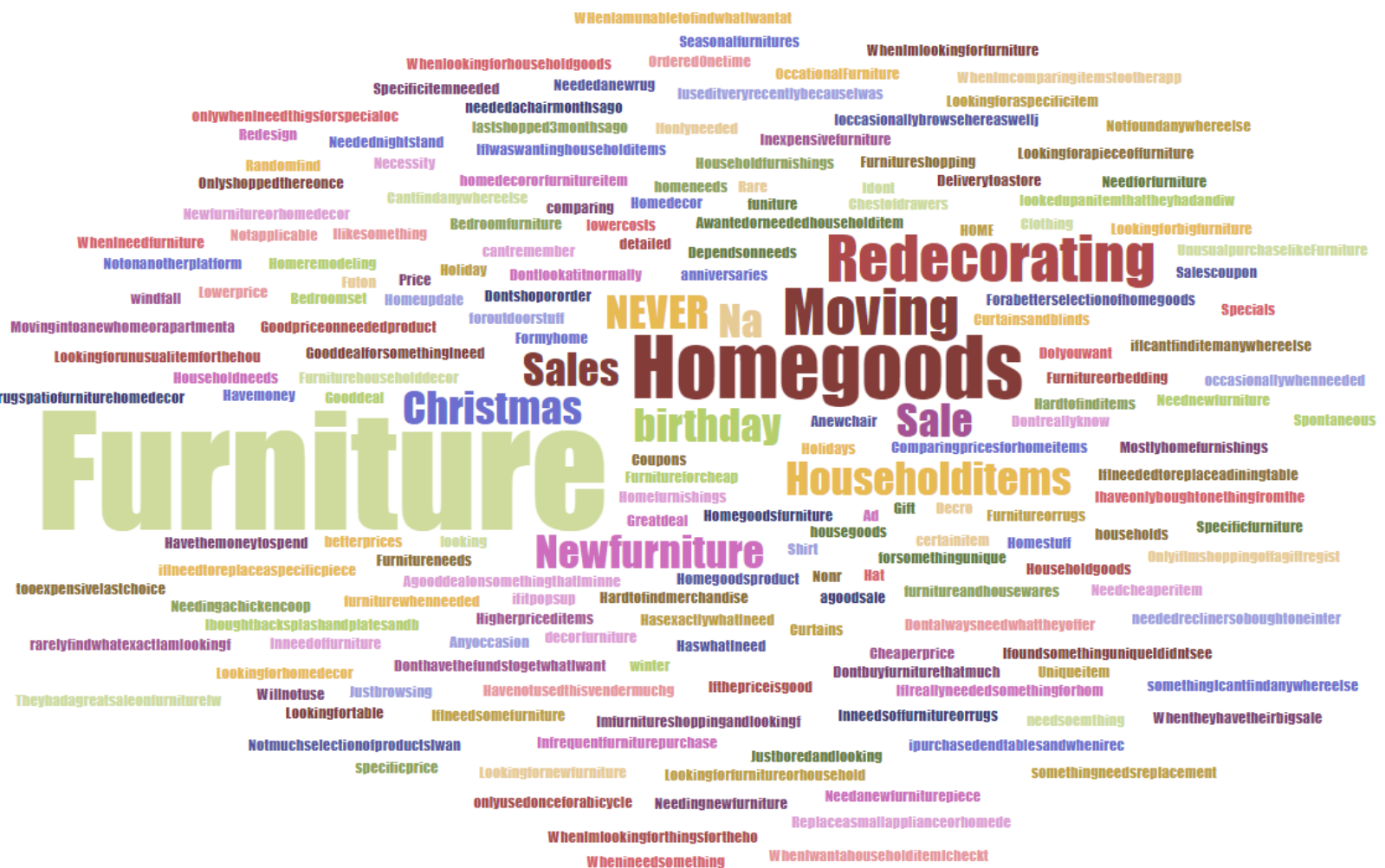
October 2024 Breakout



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?

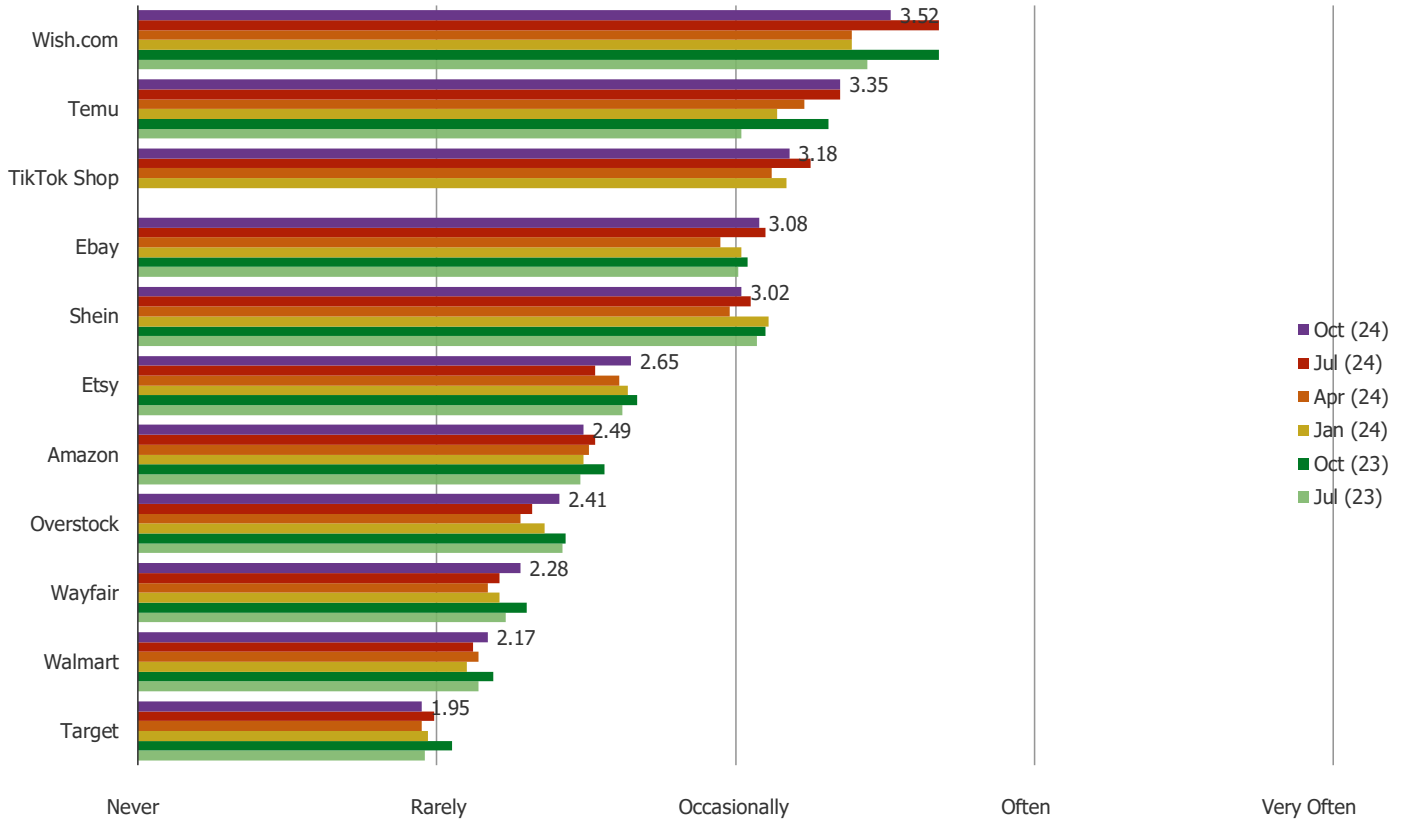
Posed to all respondents who shop the below and their use is more episodic than regular.

Wayfair

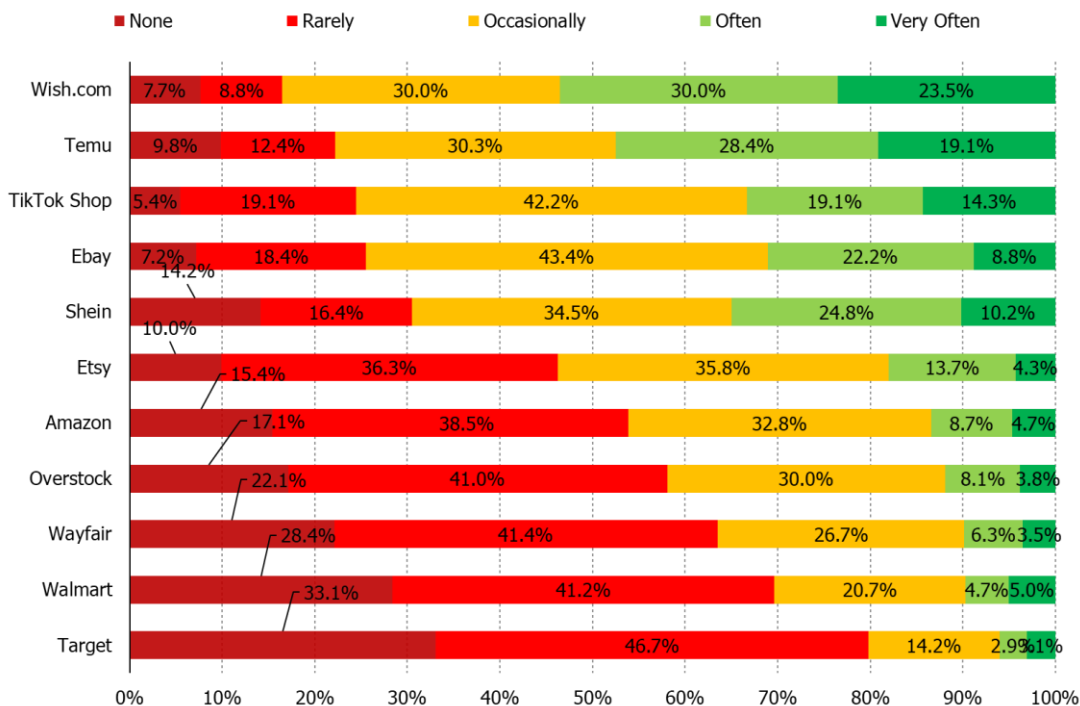


HOW OFTEN DO YOU THINK THERE ARE COUNTERFEIT / FAKE ITEMS BEING SOLD ON THIS PLATFORM?

Posed to all respondents who shop the below.

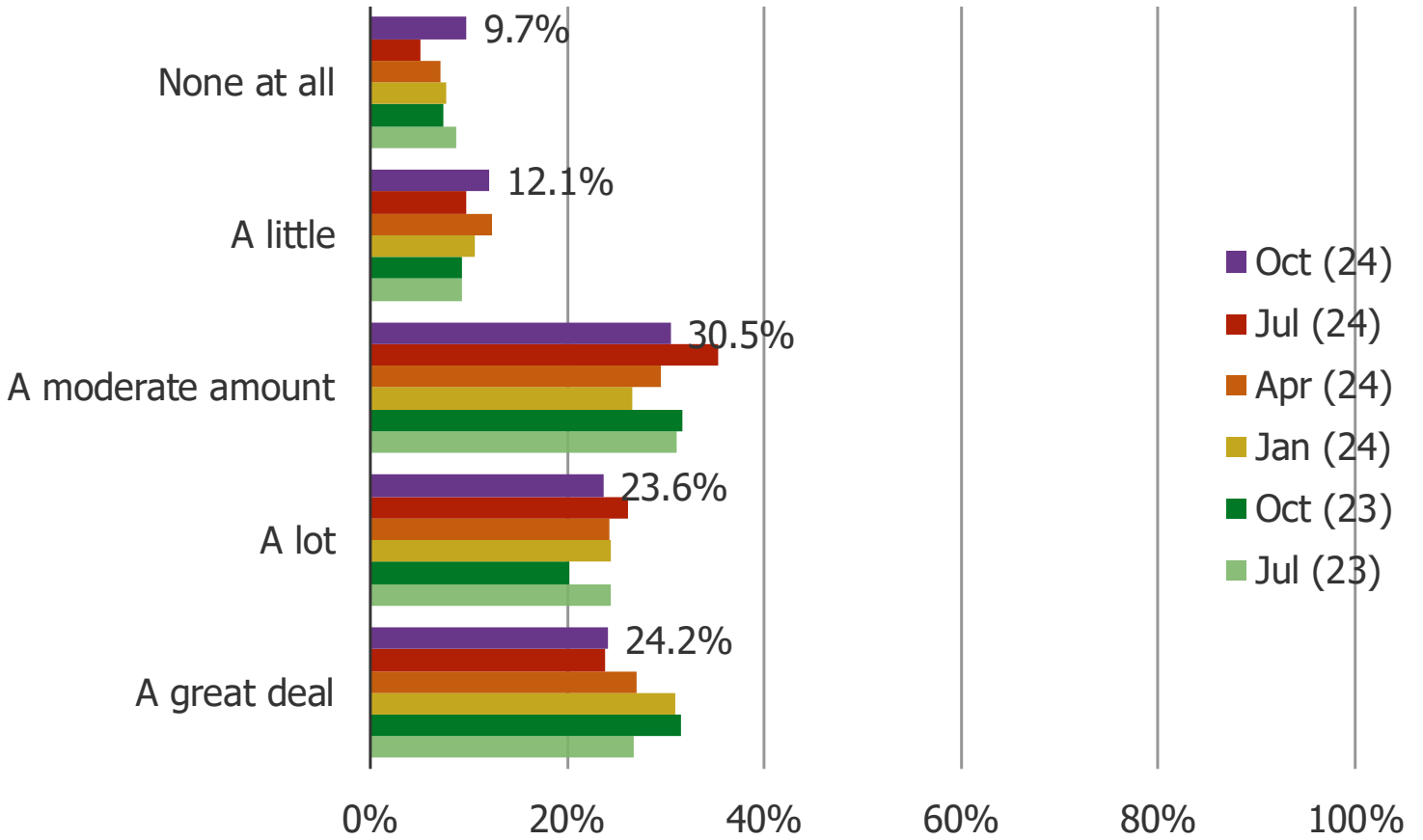


October 2024 Breakout



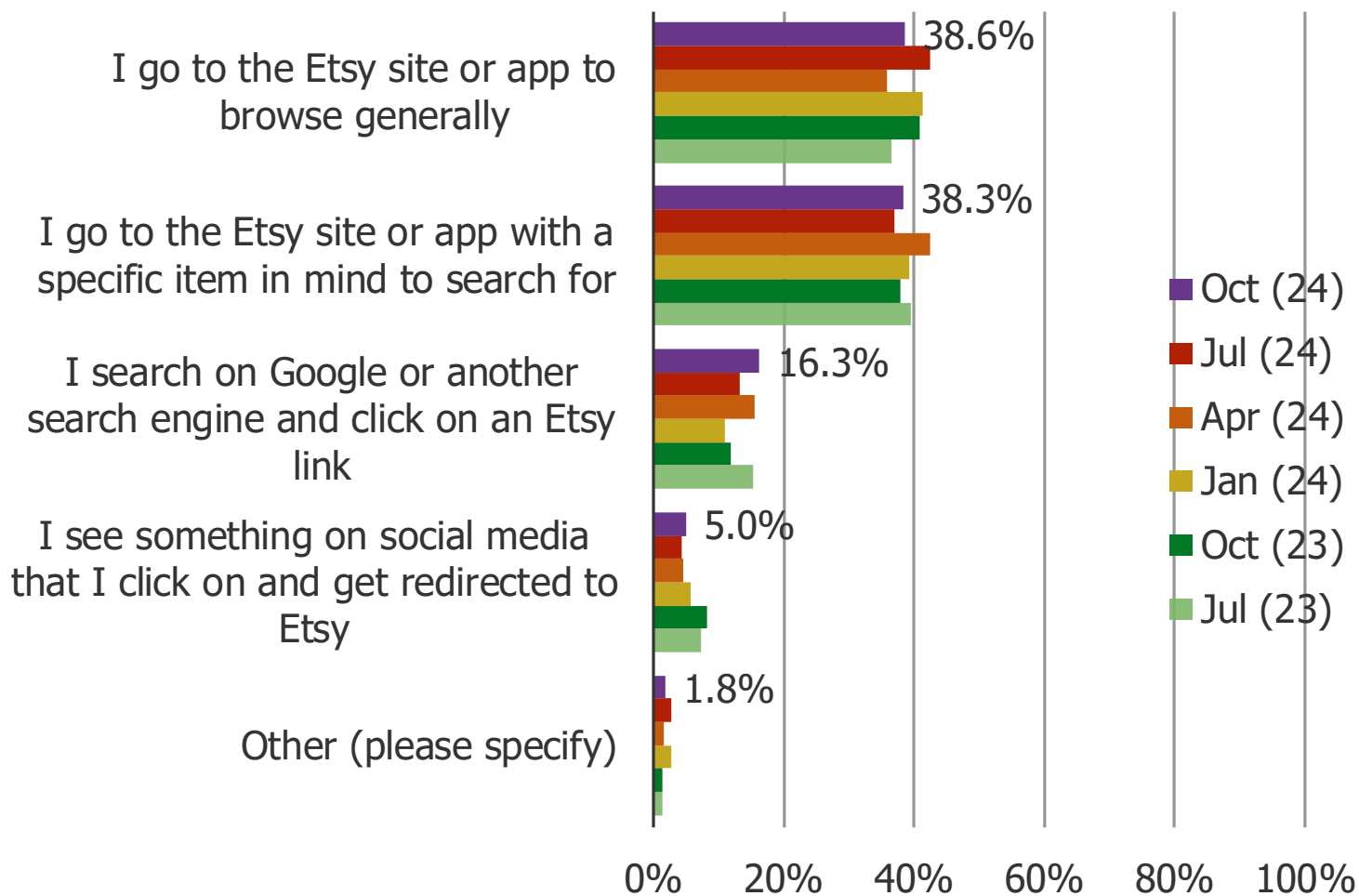
WHEN YOU SHOP ETSY, HOW MUCH DOES IT MATTER TO YOU THAT YOU ARE SUPPORTING SMALL BUSINESSES AND MAKING A POSITIVE IMPACT WITH YOUR PURCHASES?

Posed to all respondents who shop Etsy.



HOW DO YOU MOST COMMONLY FIND YOURSELF SHOPPING ON ETSY?

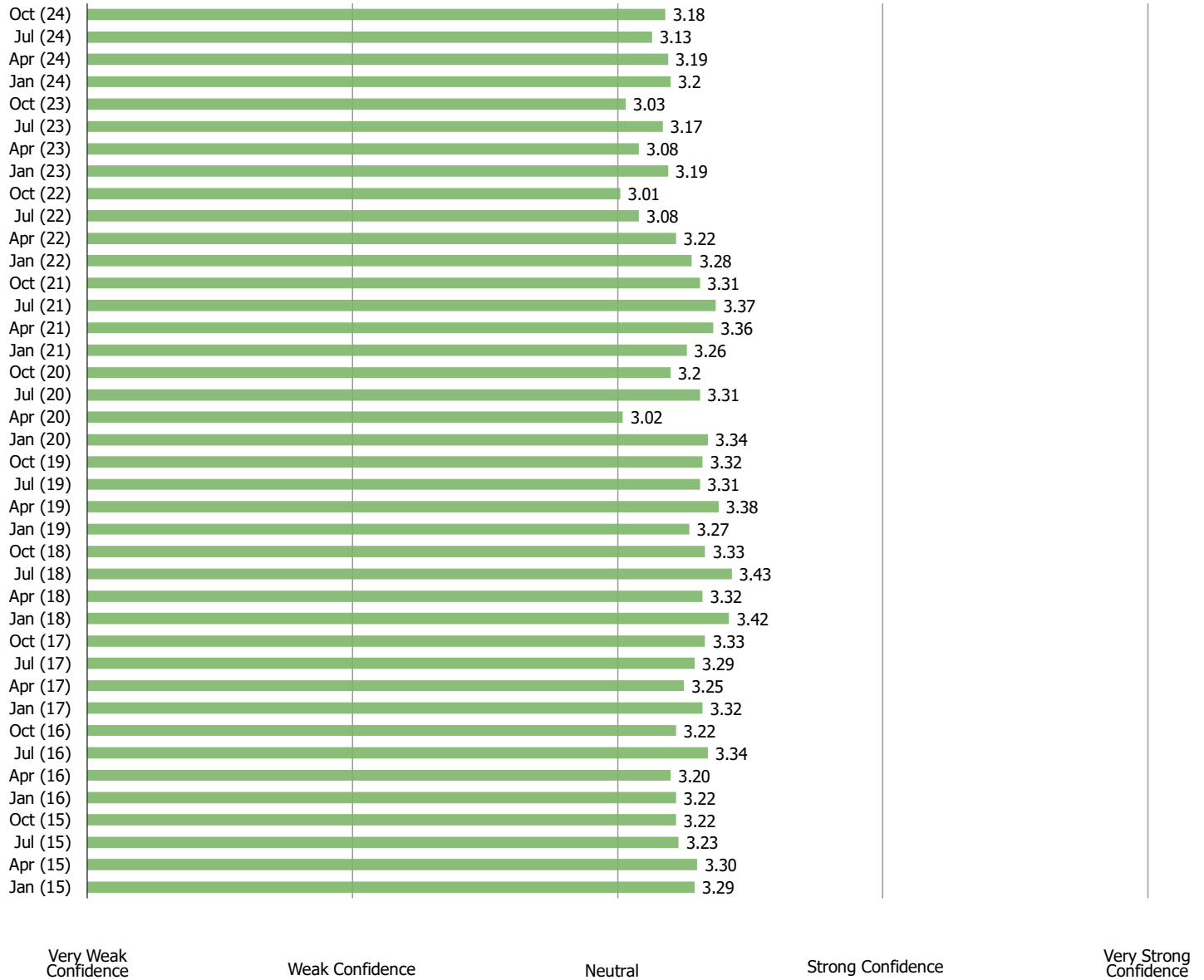
Posed to all respondents who shop Etsy.



OVERALL SHOPPING TRENDS

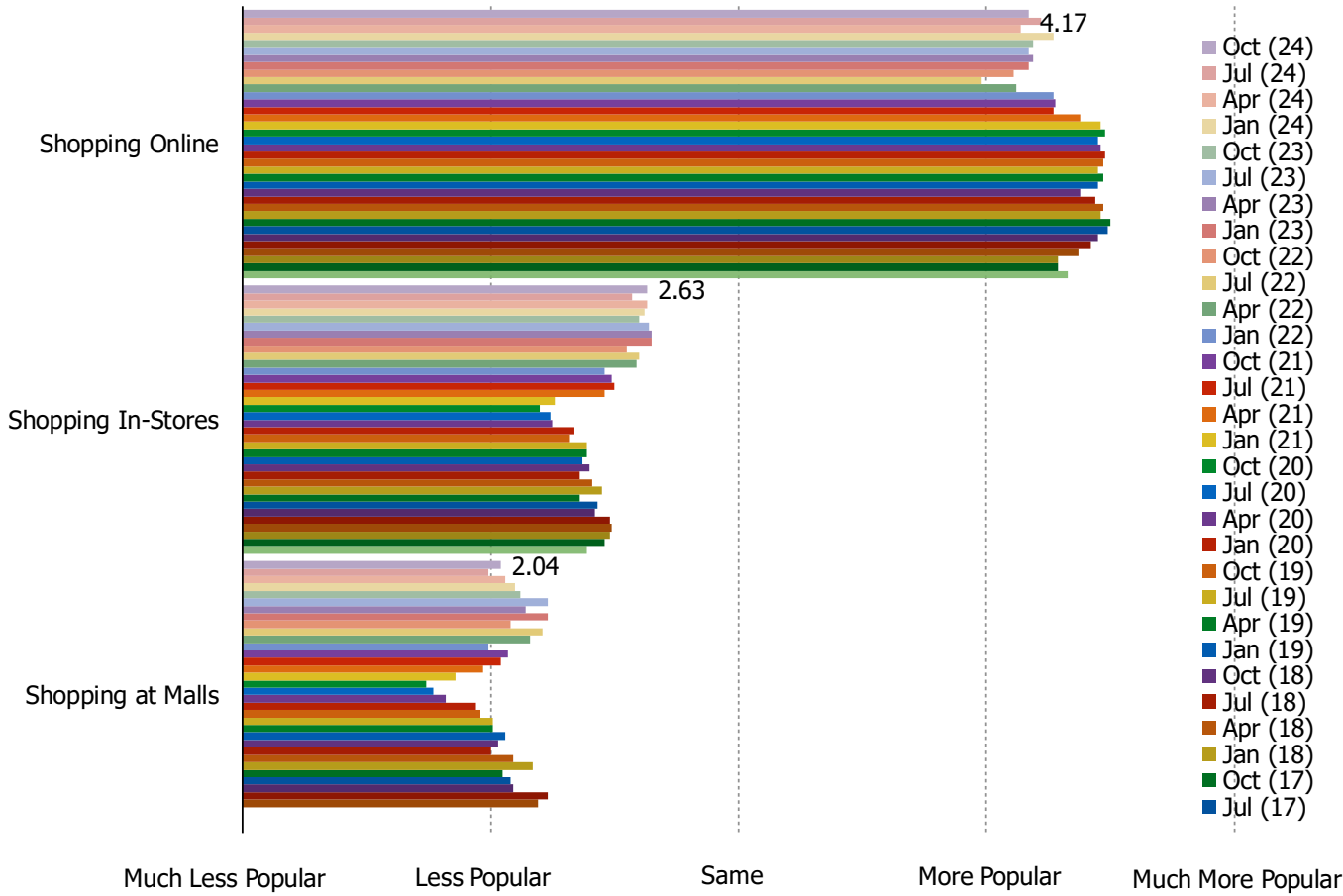
HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



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

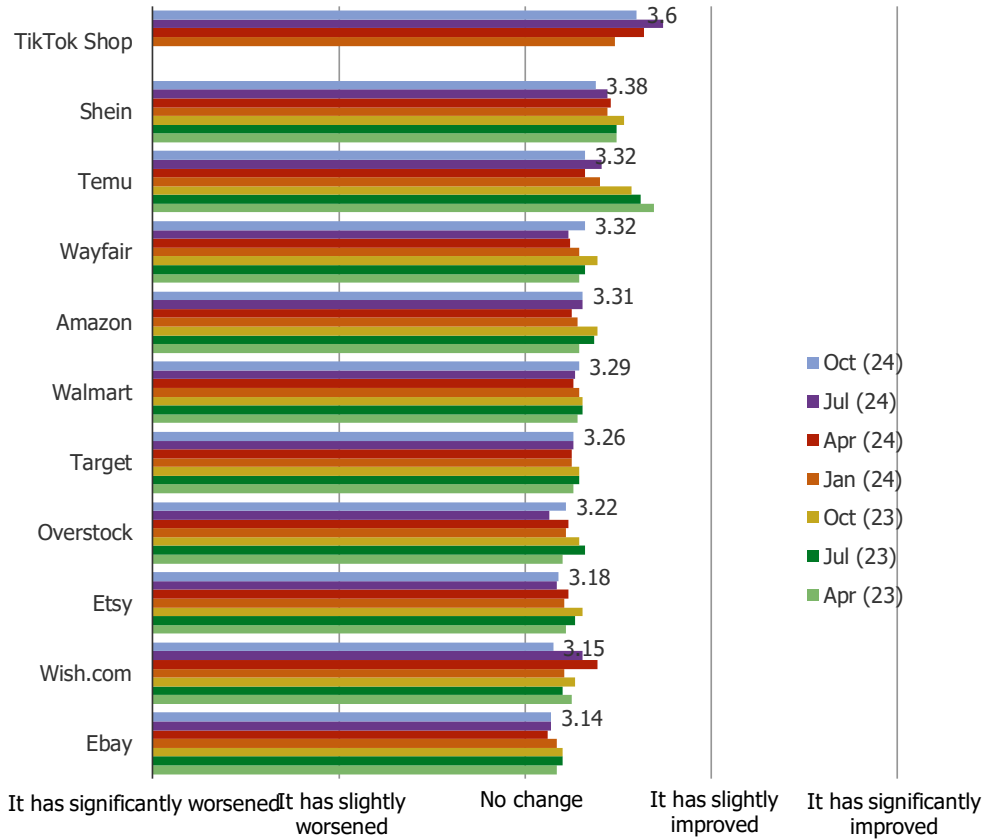
Posed to all respondents



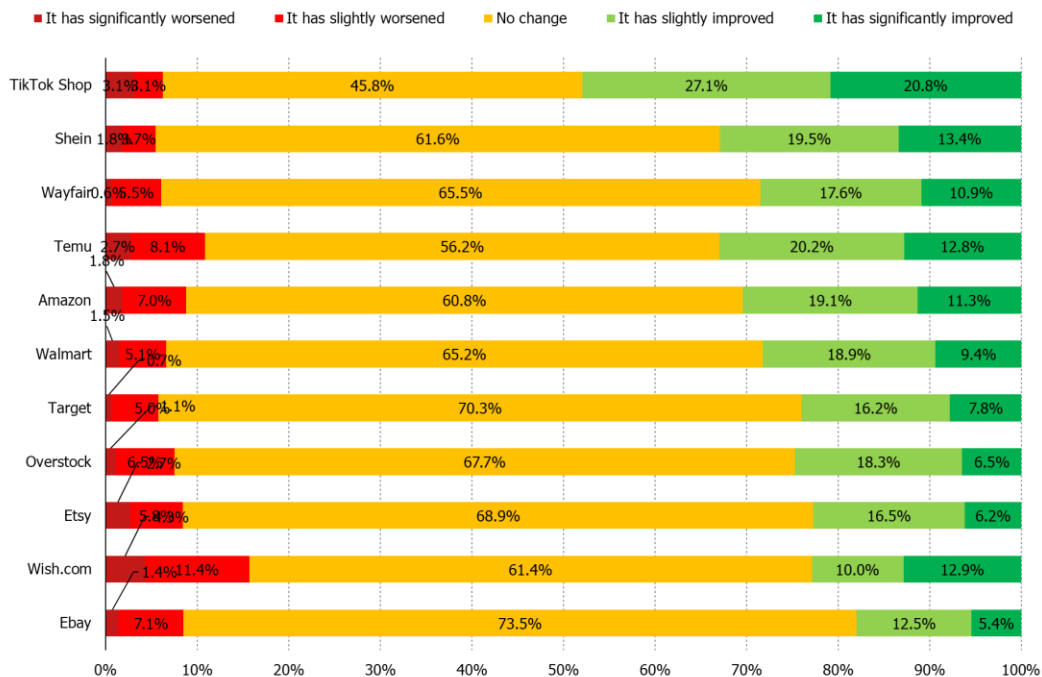
SALES AND TRUST

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:

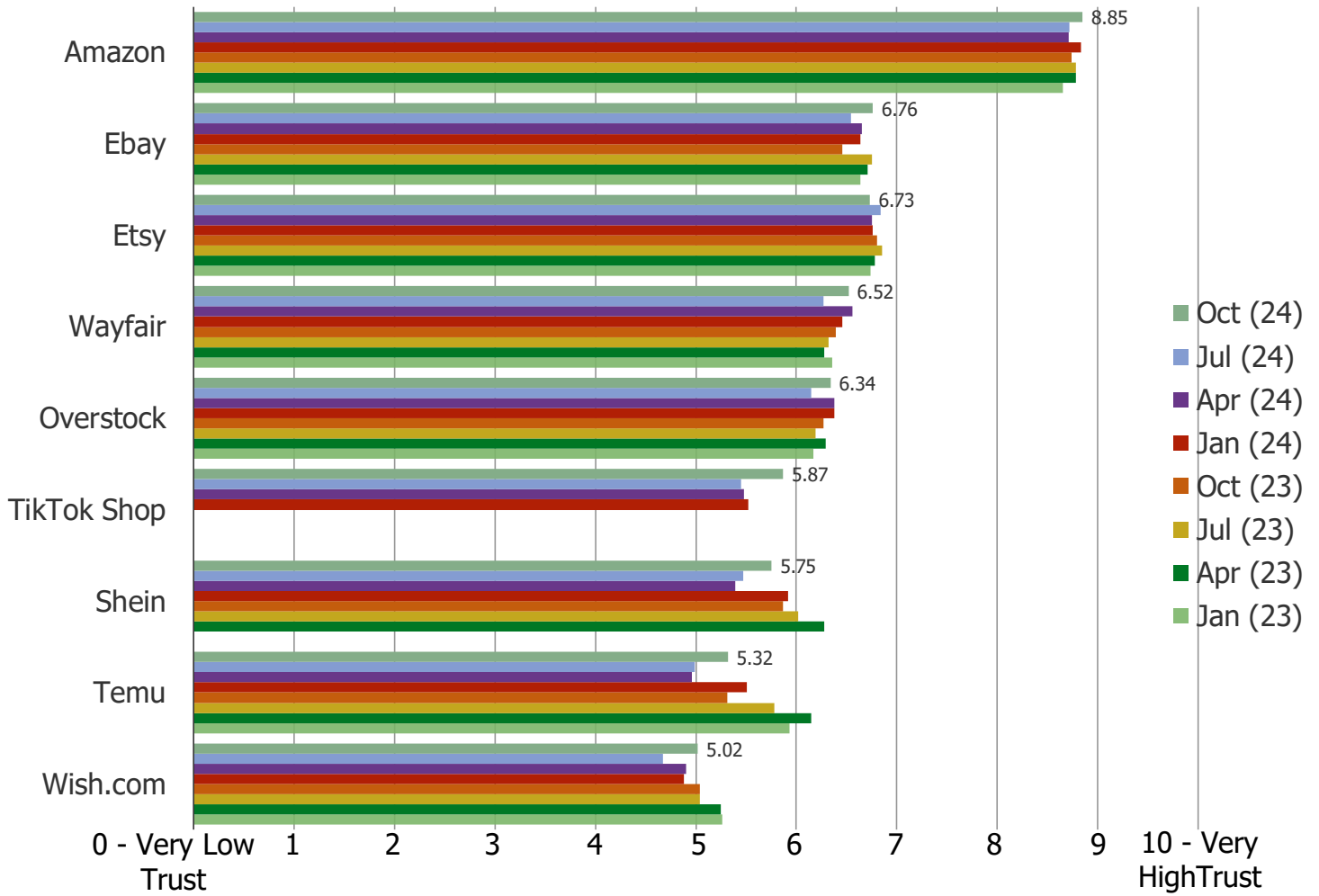


October 2024 Breakout



HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

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

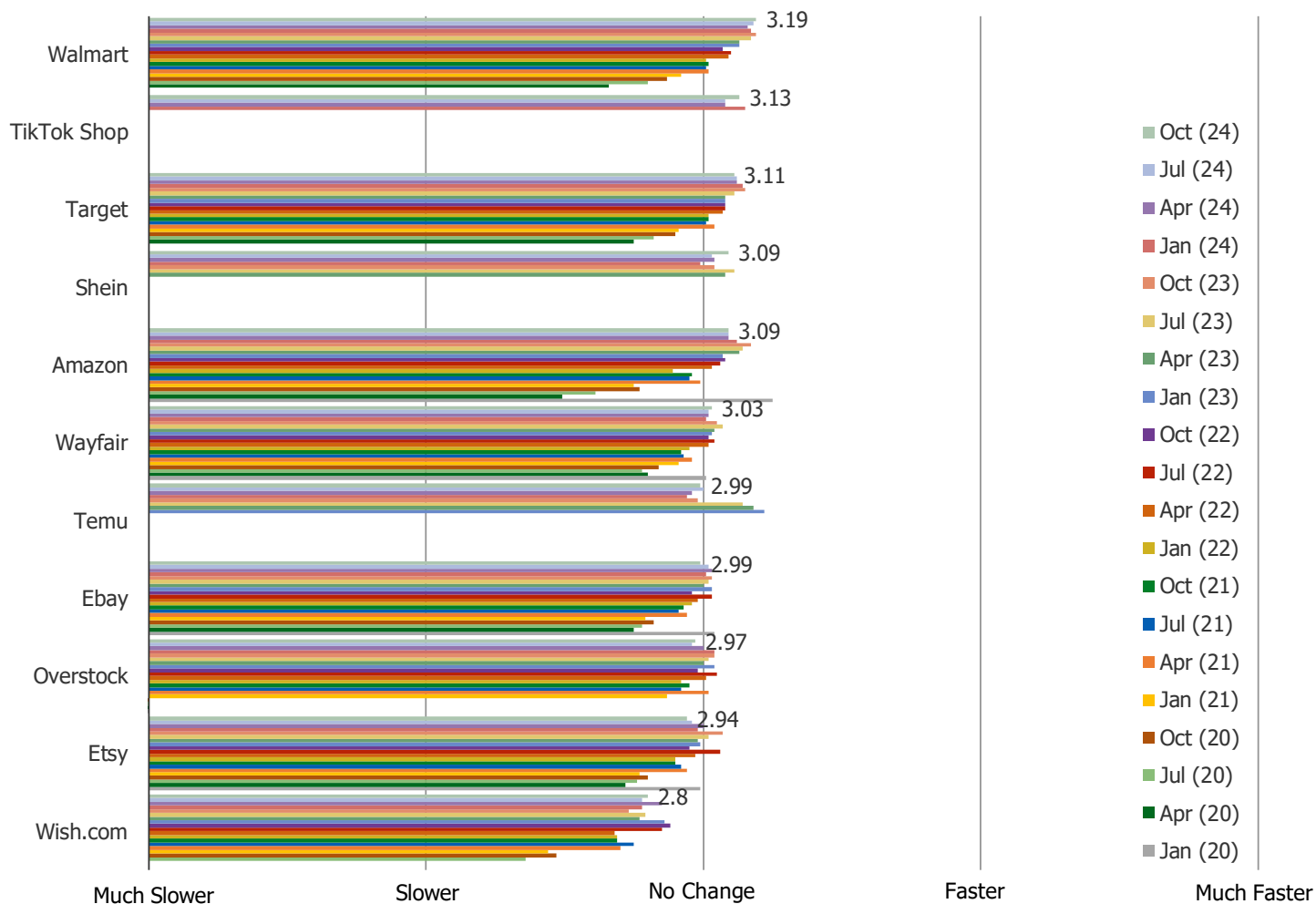


	N=
Etsy	782
Amazon	934
Ebay	877
TikTok Shop	336
Overstock	664
Wayfair	763
Wish.com	483
Temu	763
Shein	551

SHIPPING

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

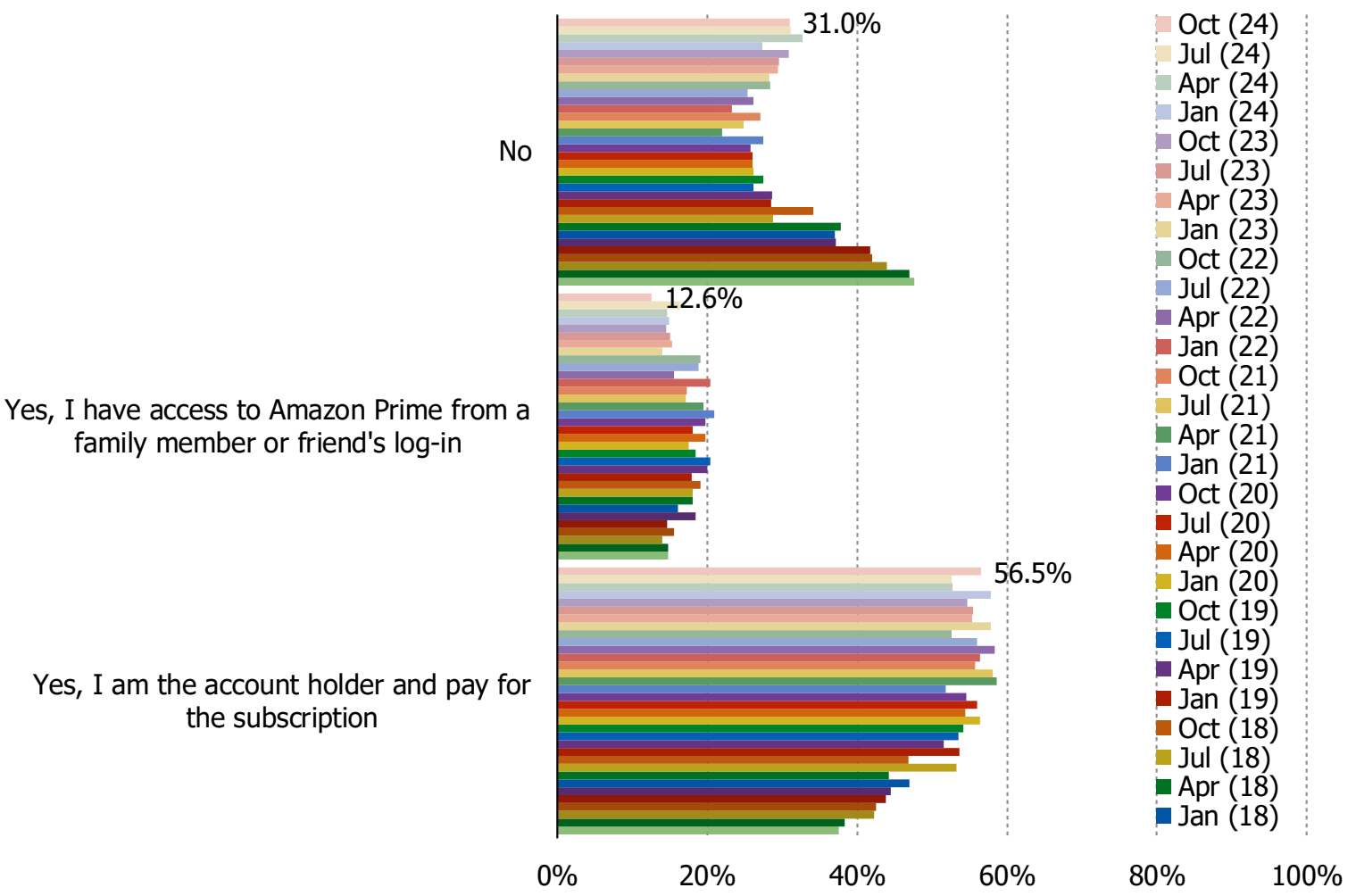
Posed to users of each site/app.



AMZN PRIME TRENDS

ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

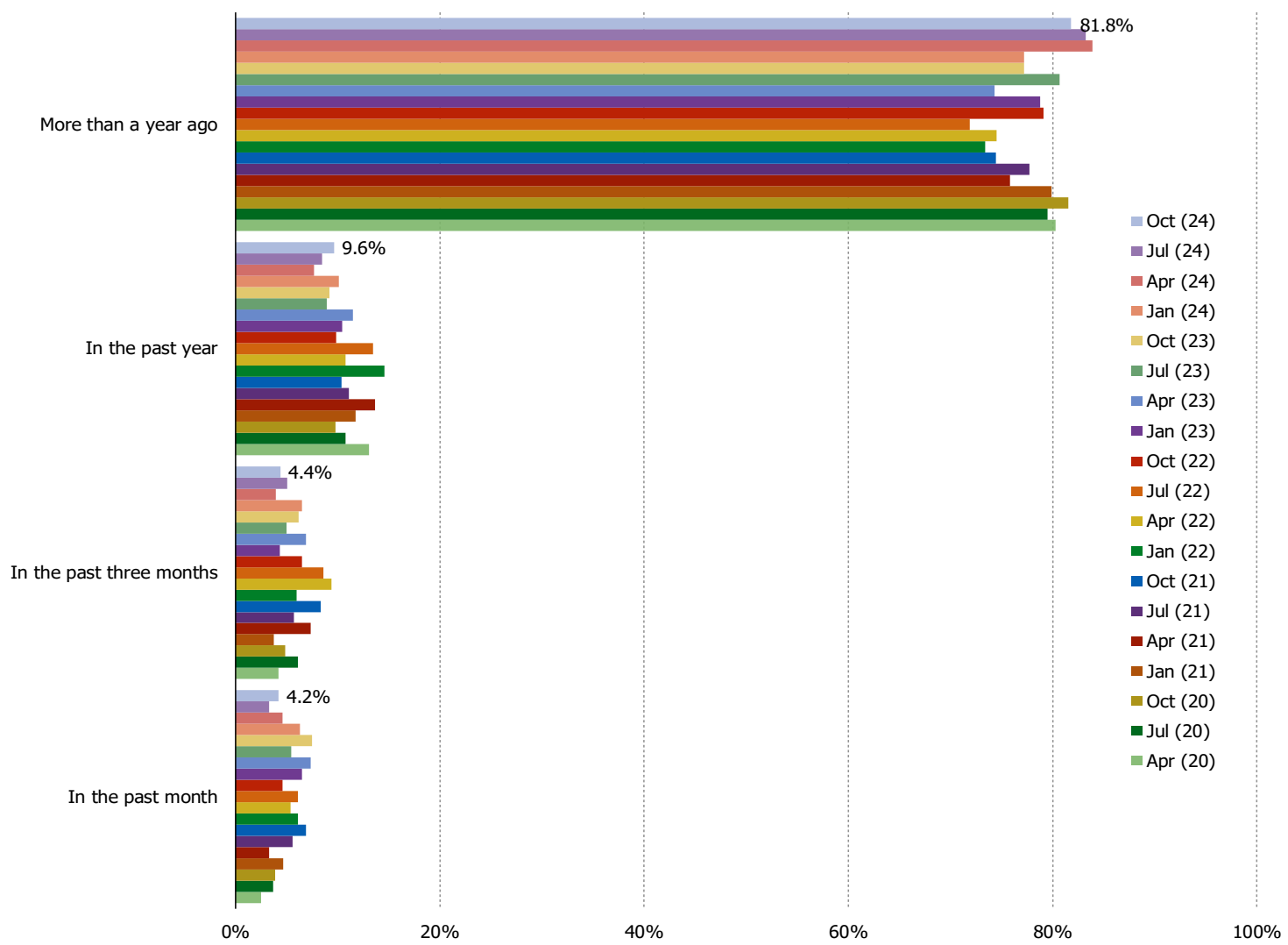
Posed to Amazon users



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.

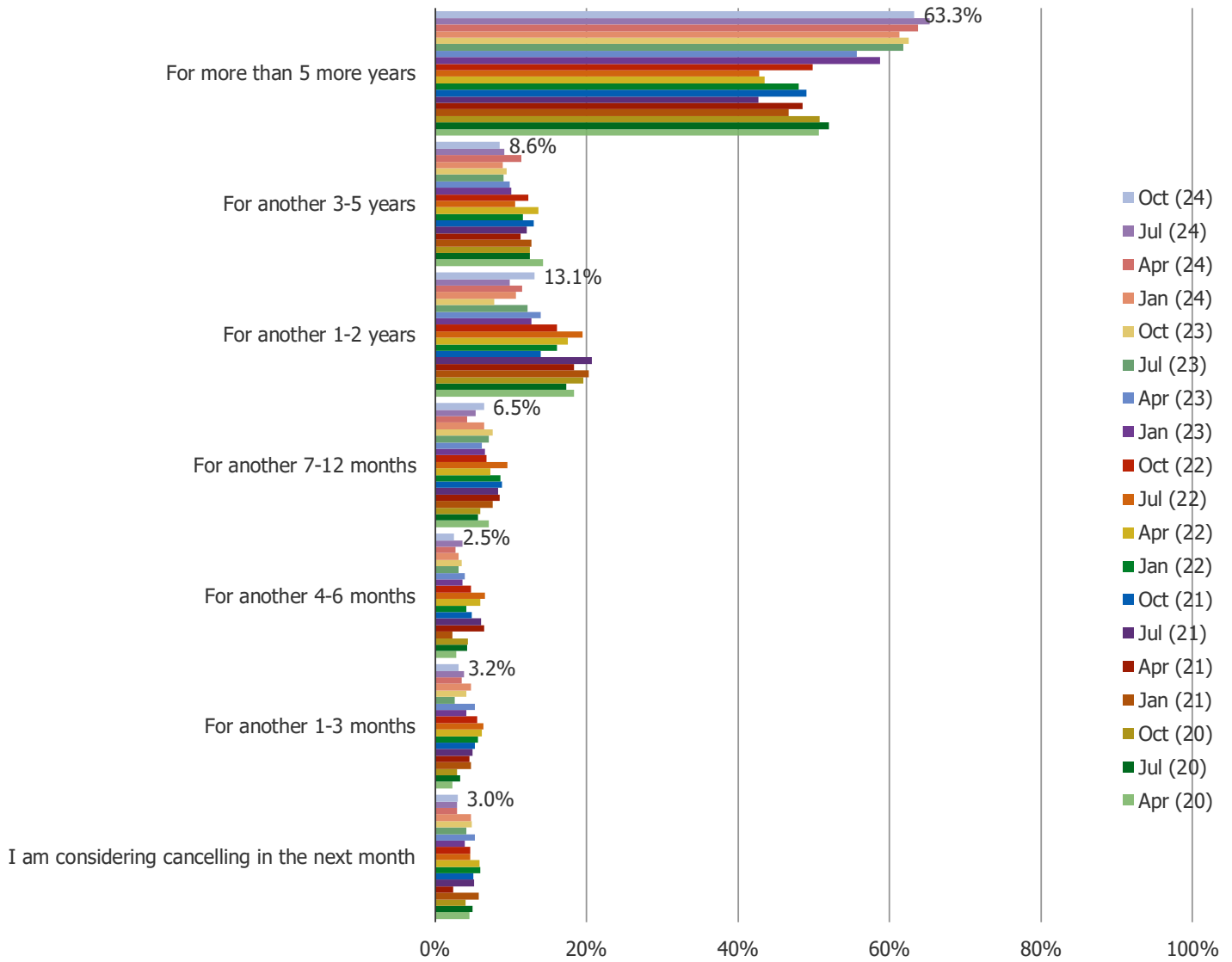
WHEN DID YOU START YOUR CURRENT AMAZON PRIME MEMBERSHIP?

Posed to Amazon users who are Prime members.



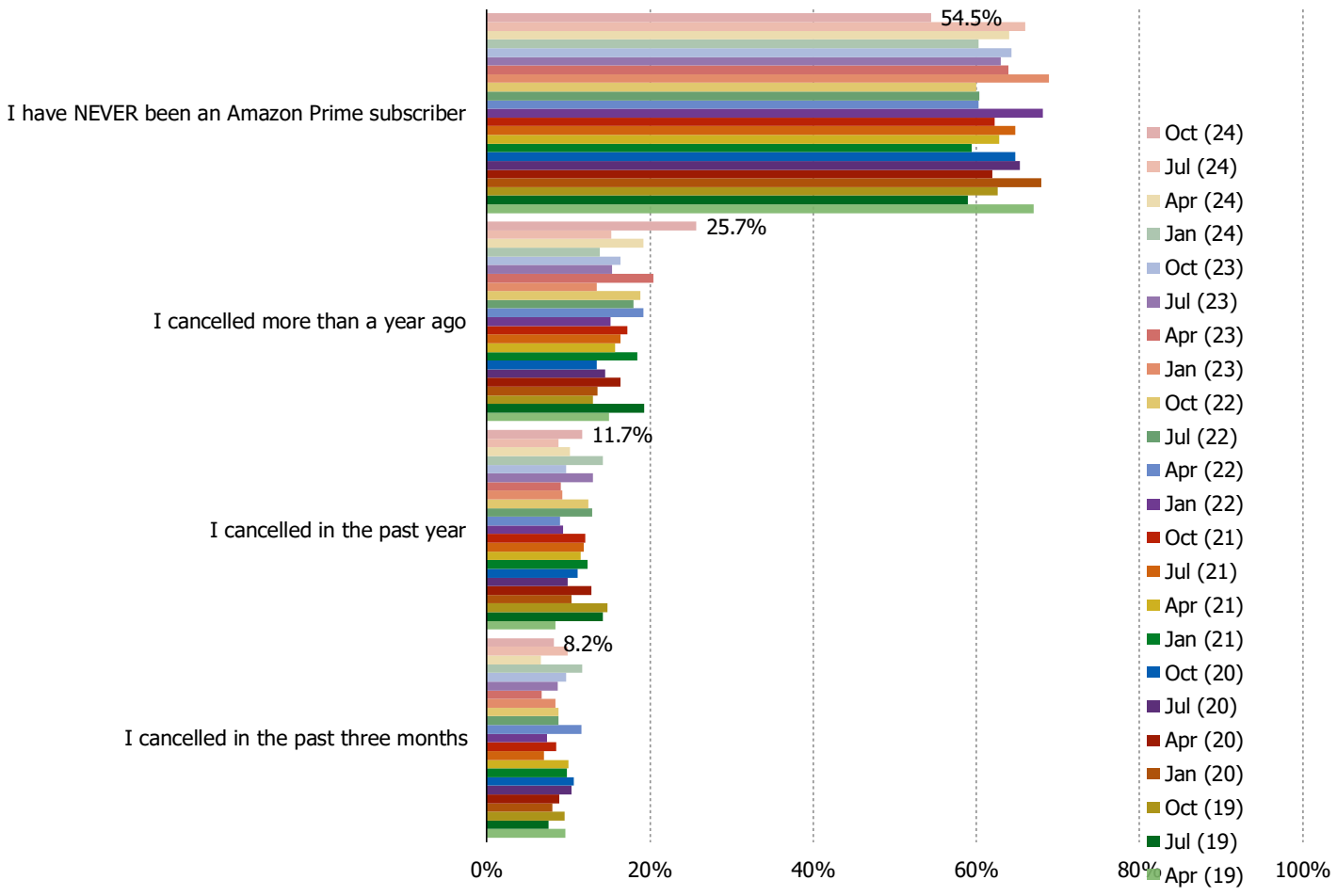
FOR HOW MUCH LONGER DO YOU INTEND TO BE AN AMAZON PRIME MEMBER?

Posed to Amazon users who are Prime members.



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

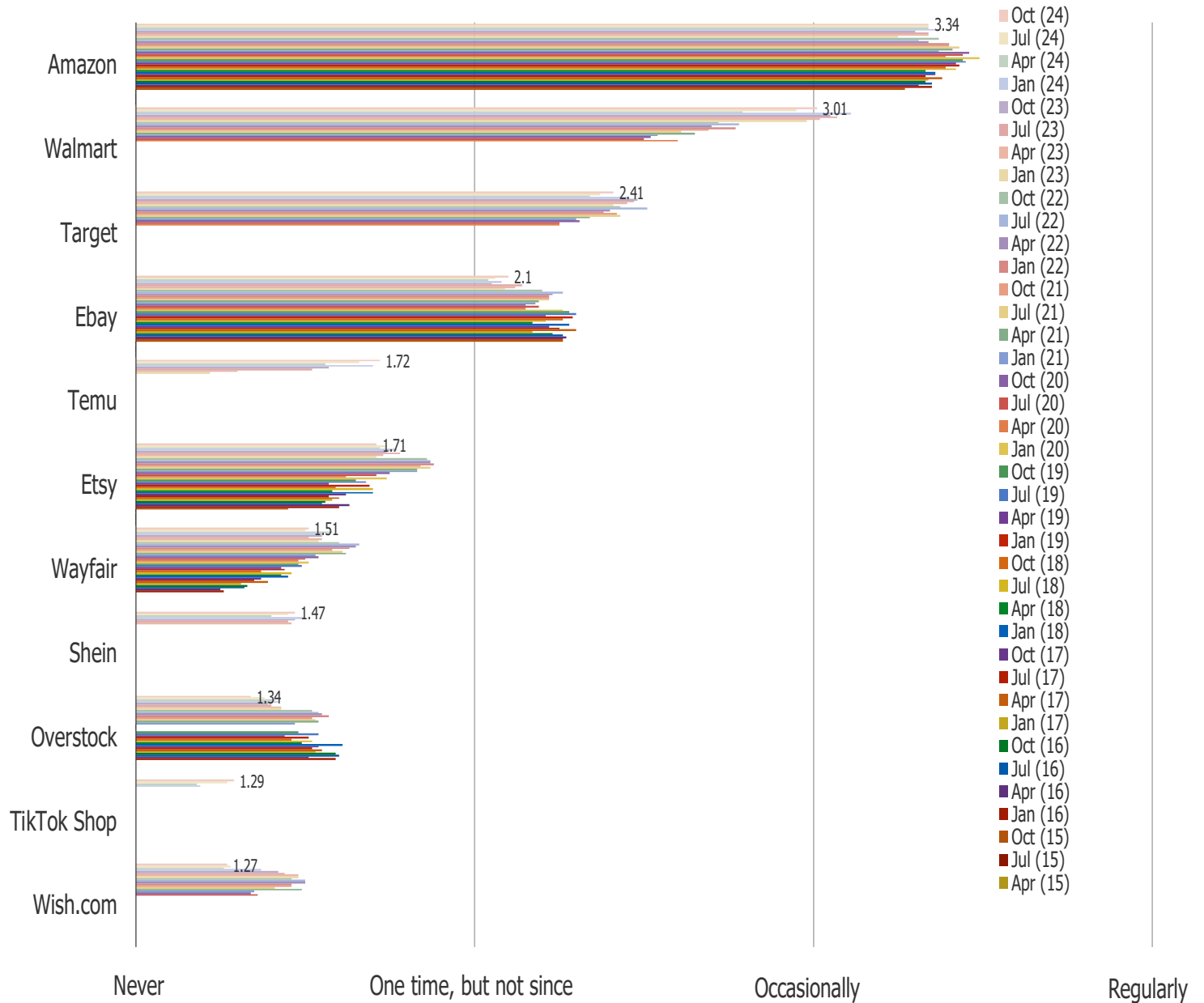
Posed to Amazon users **who are not prime subscribers**



COMPETITIVE DYNAMICS

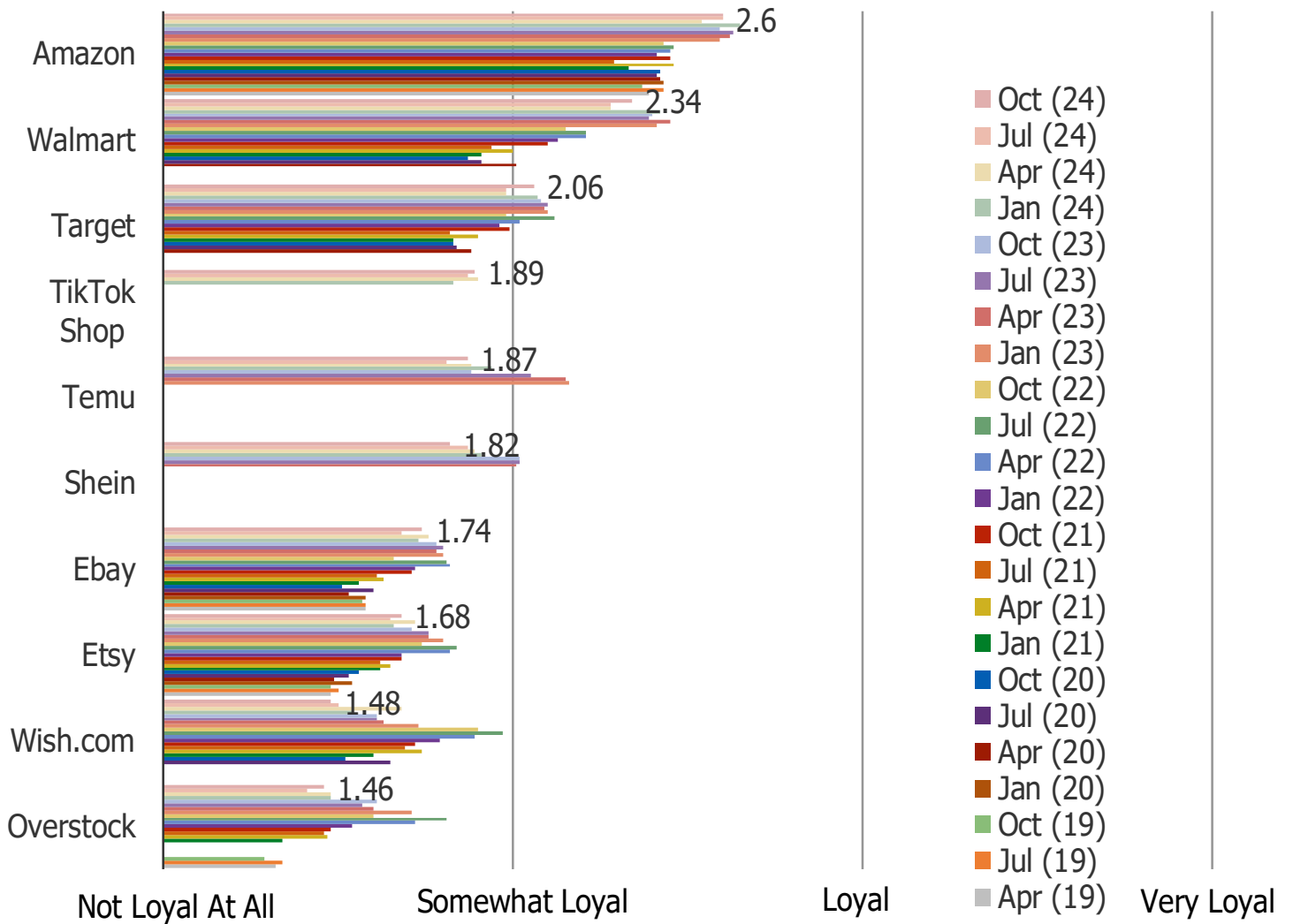
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



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

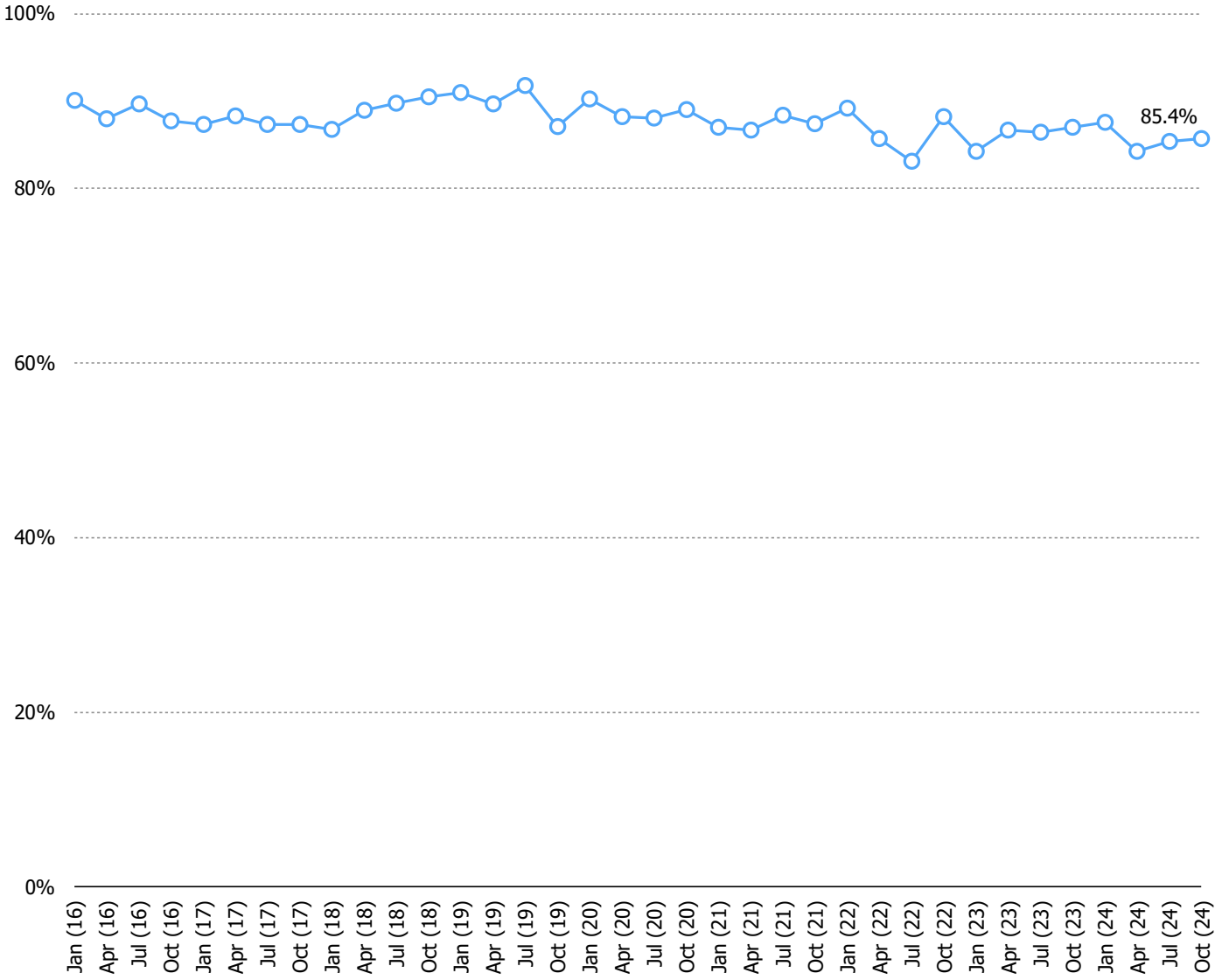
Posed to users of each site/app



AMZN TRENDS

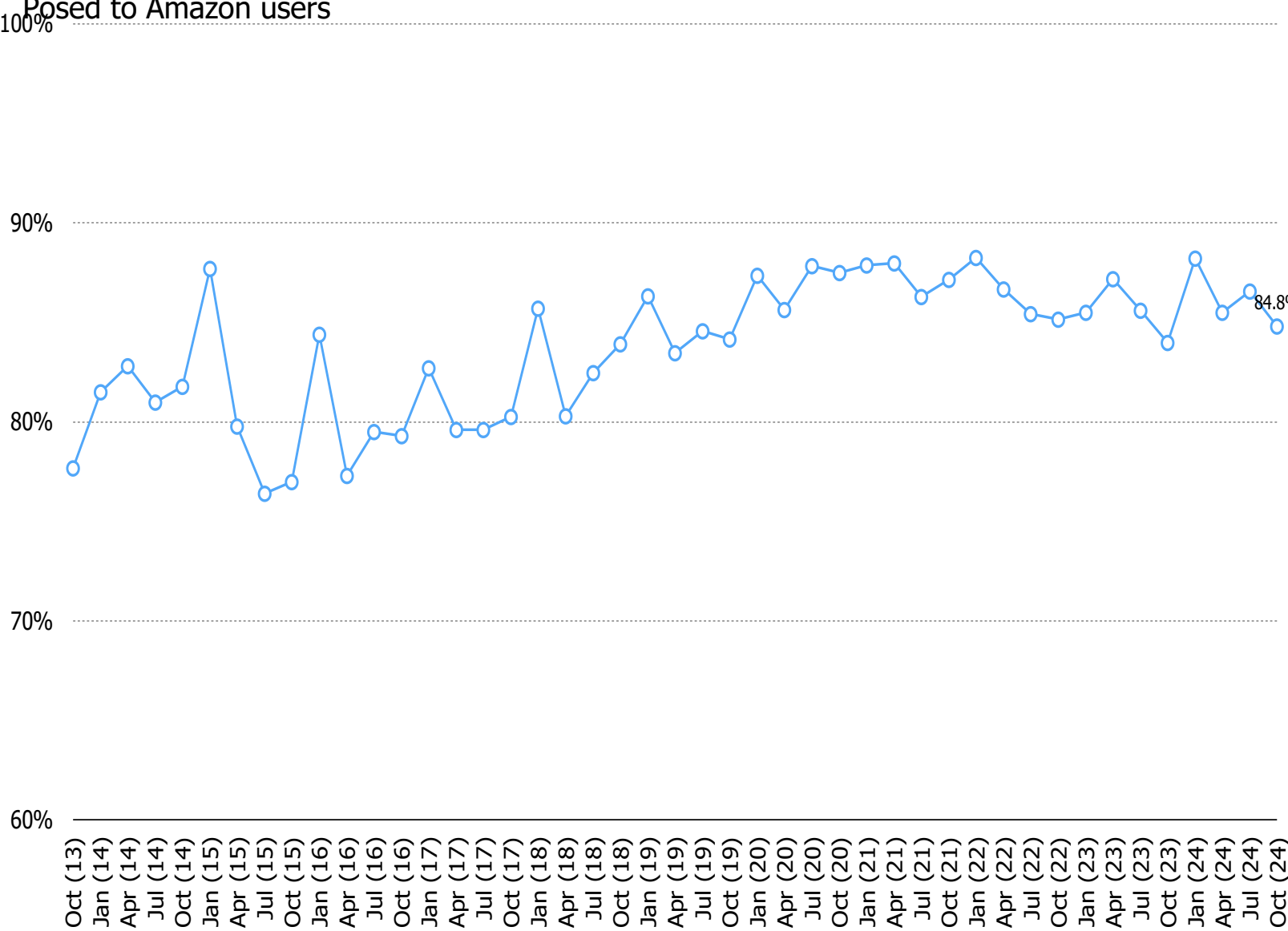
DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.



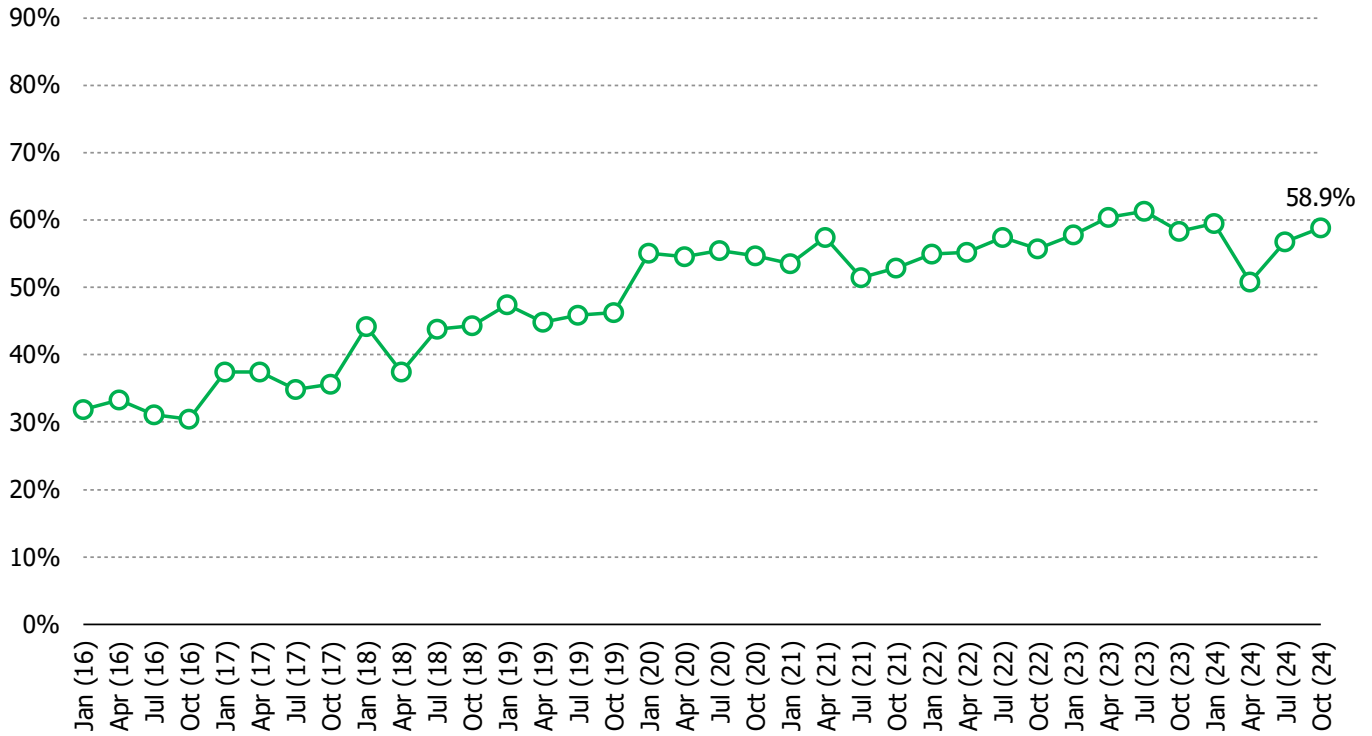
AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

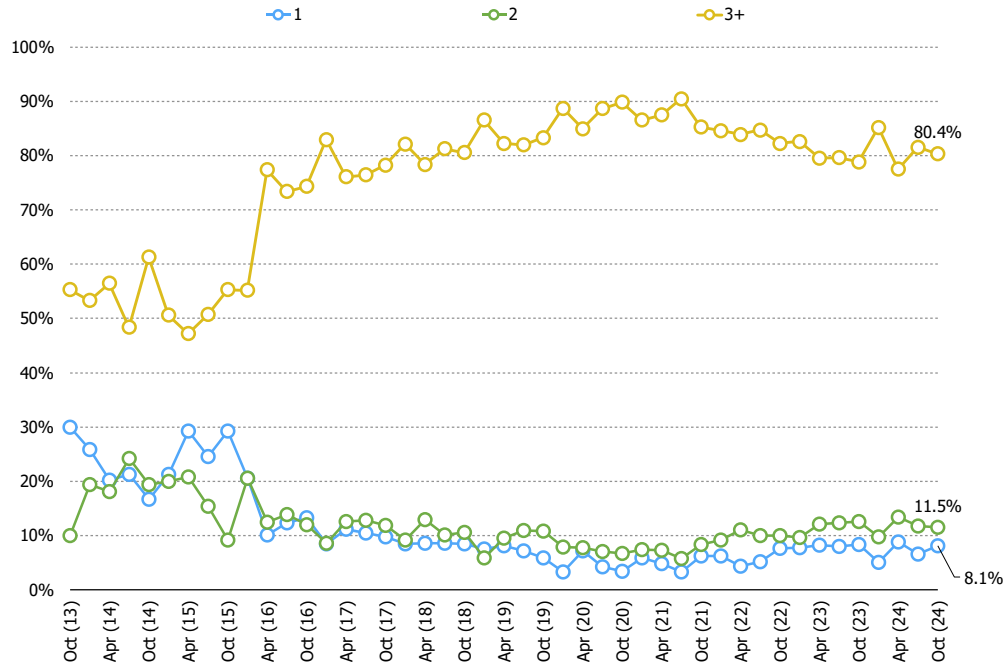


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

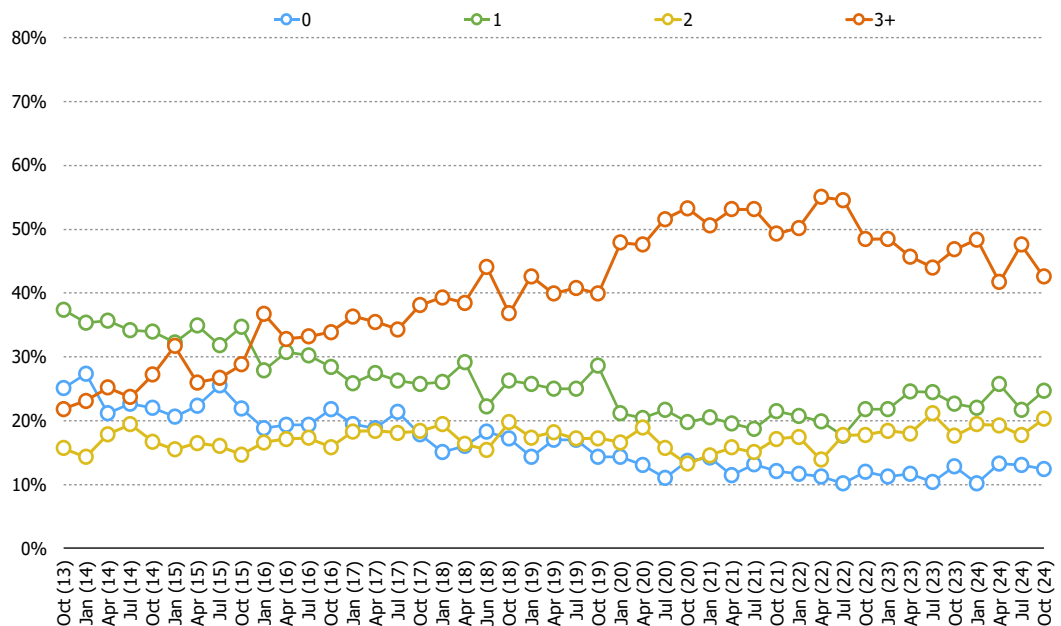
Posed to Amazon users



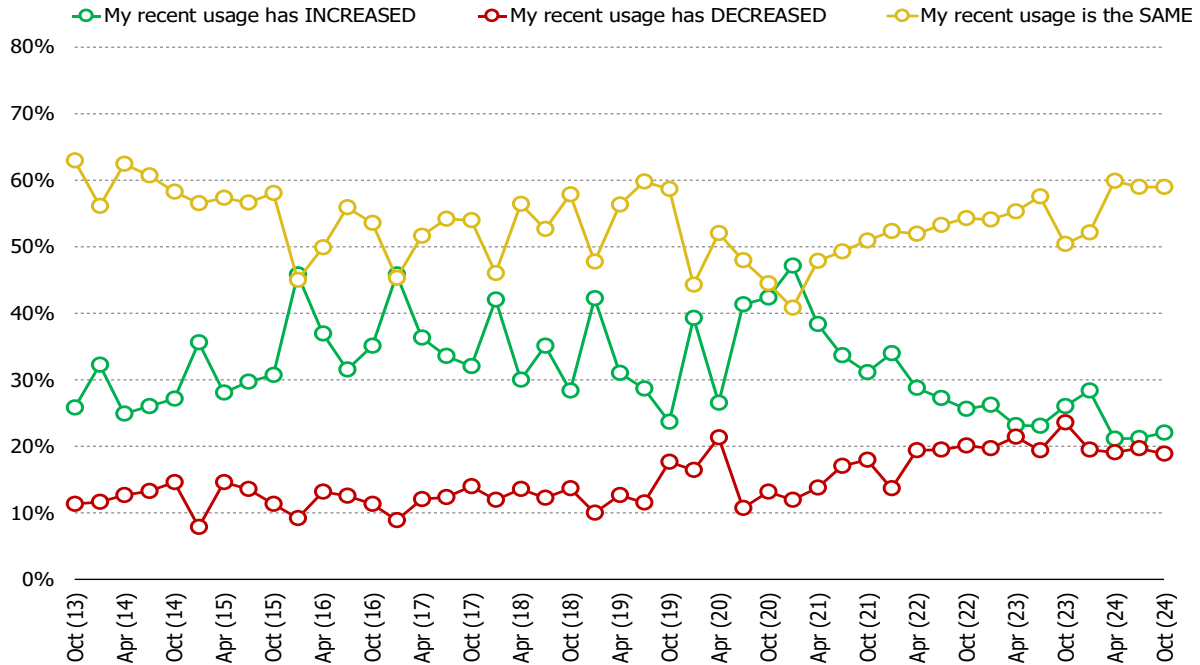
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



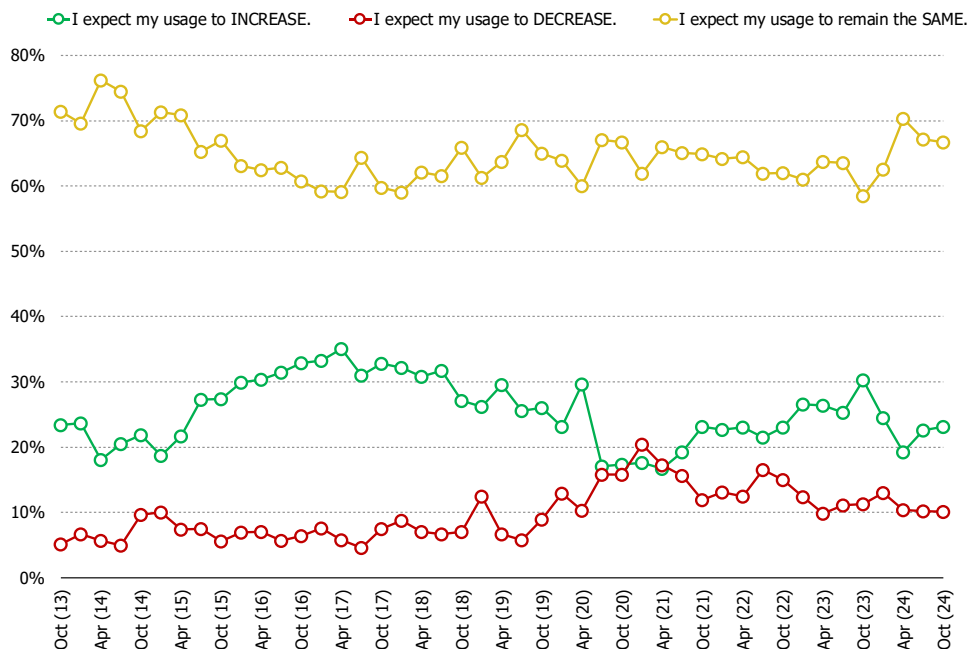
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



AMAZON USERS – RECENT USAGE

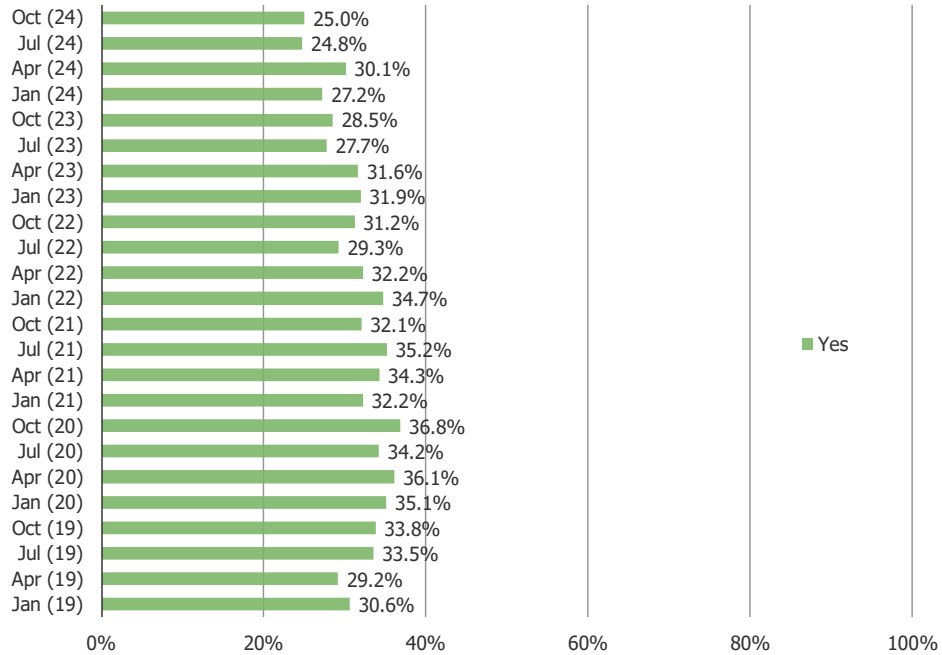


AMAZON USERS – EXPECTED USAGE

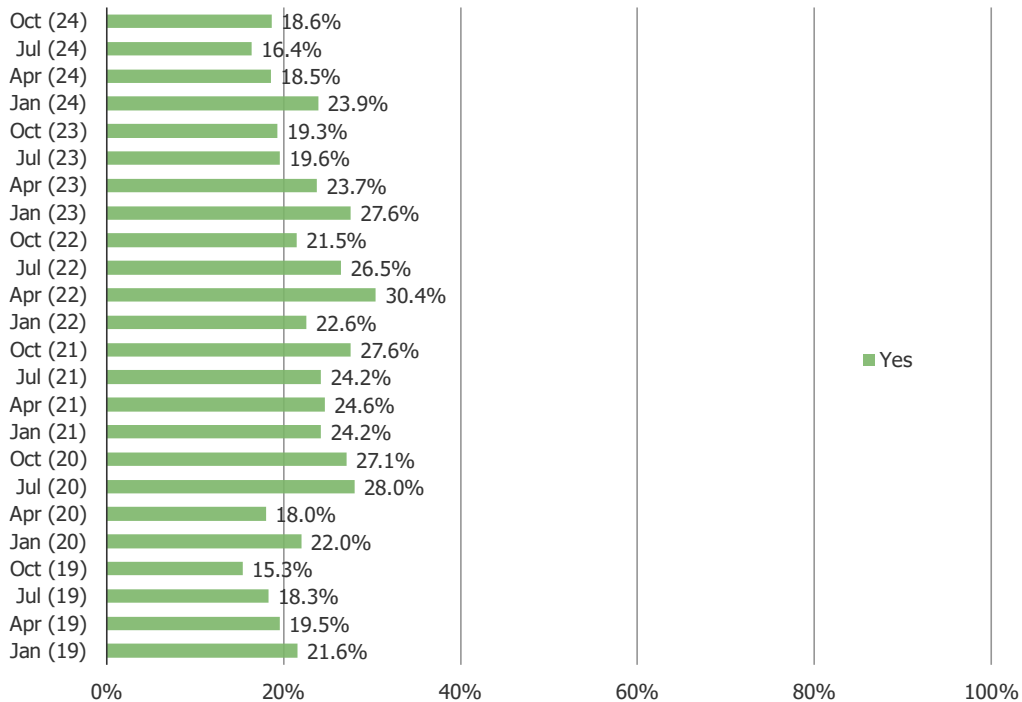


WAYFAIR TRENDS

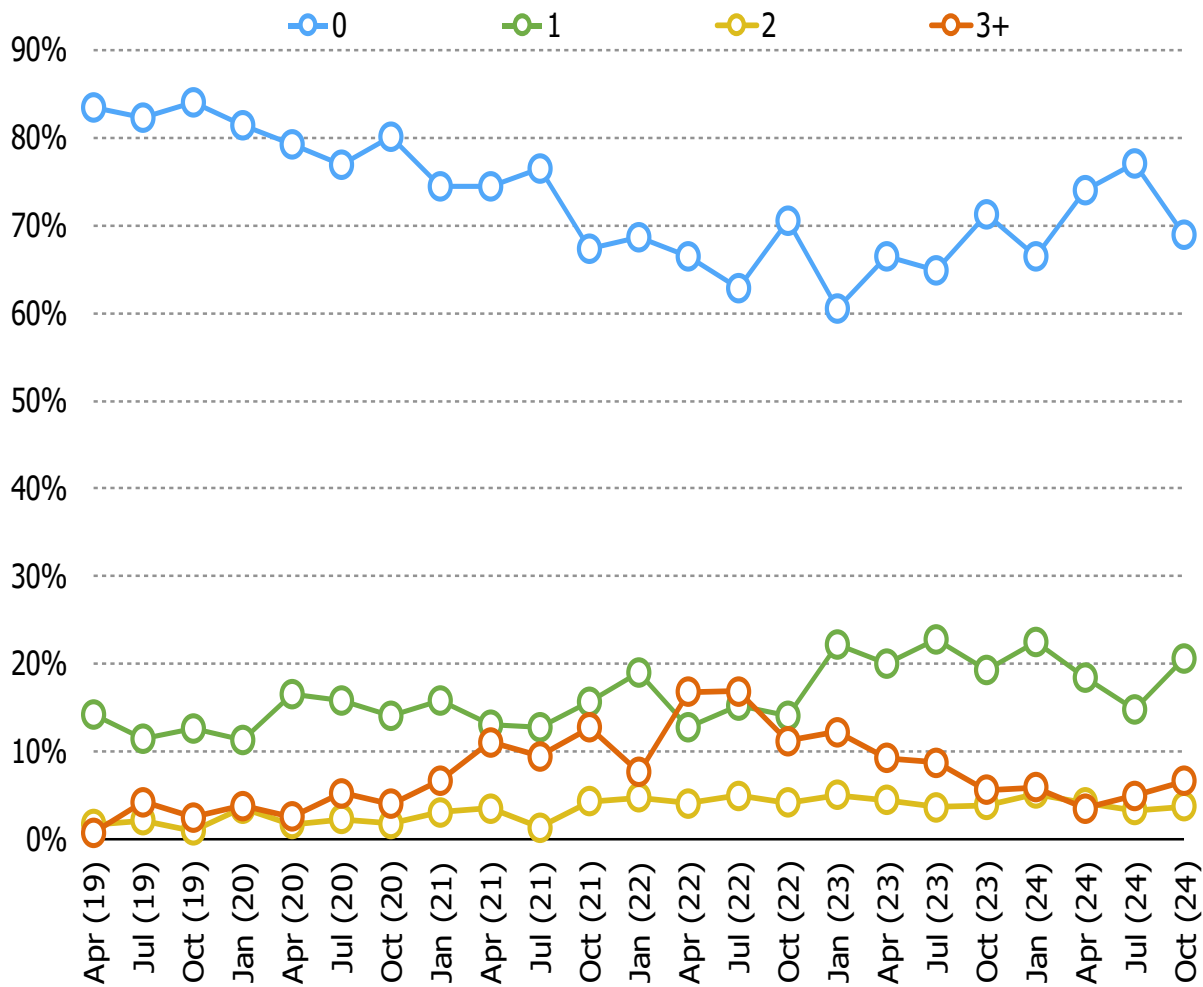
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



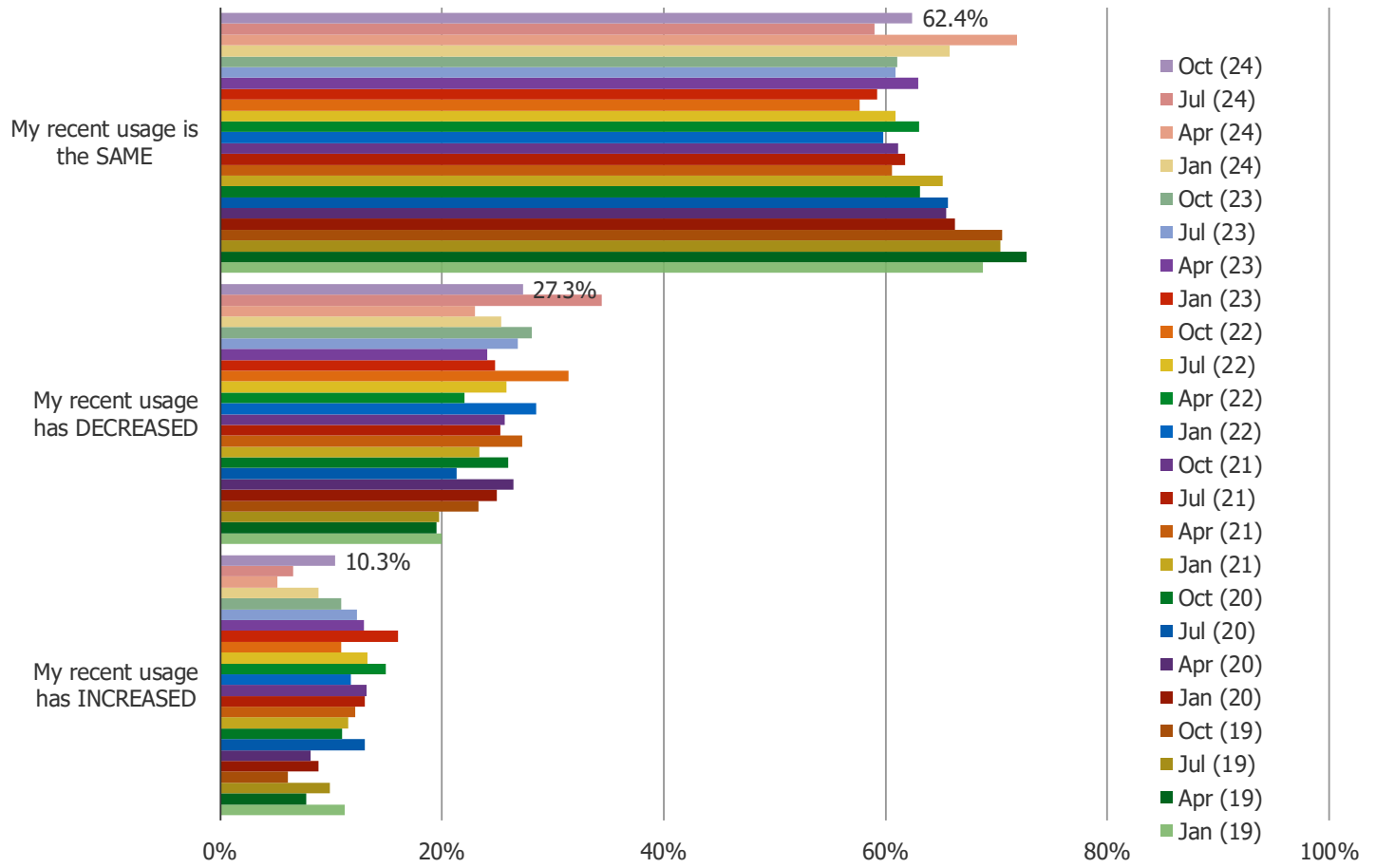
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?



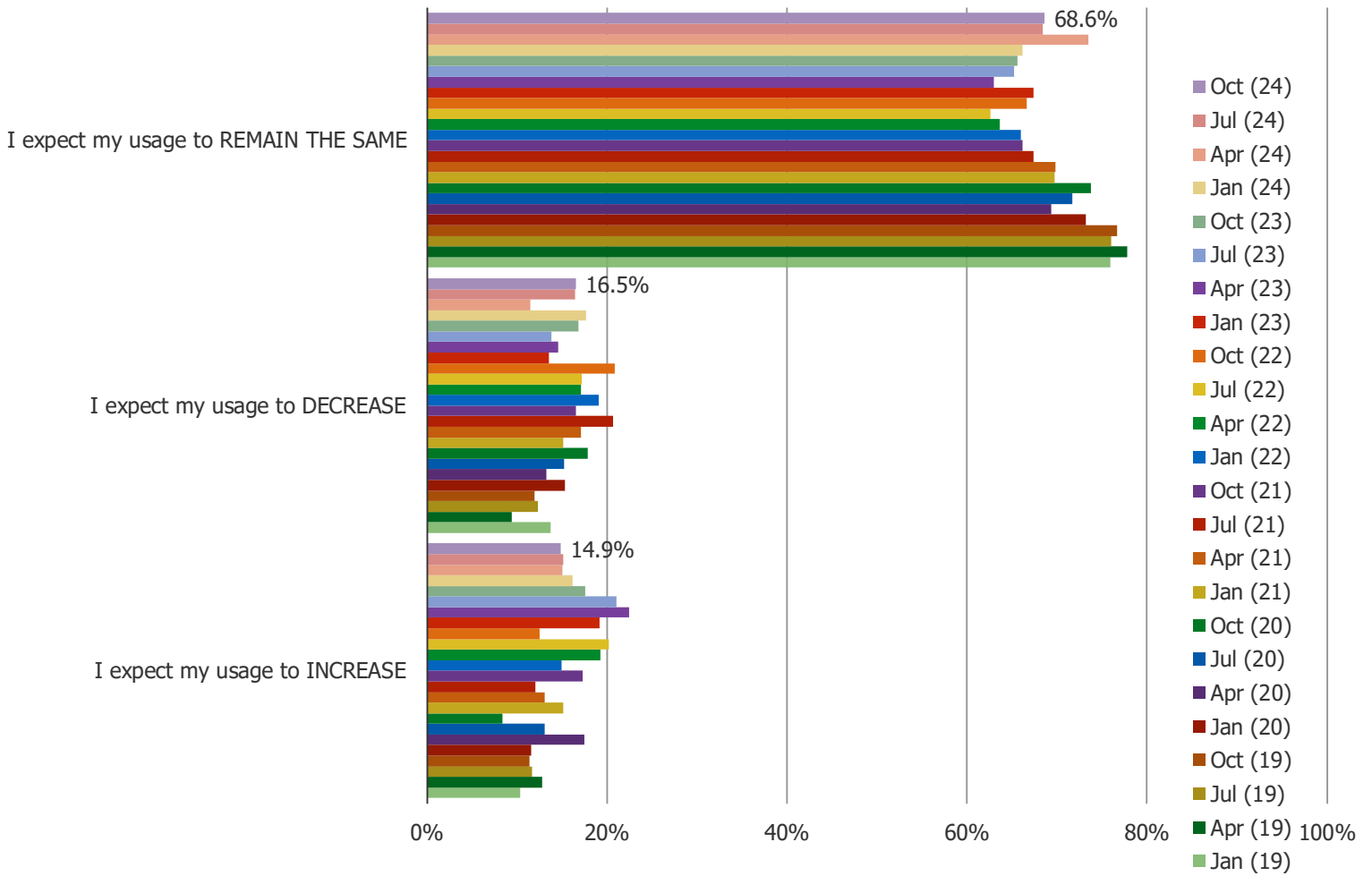
ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



WAYFAIR USERS – RECENT USAGE

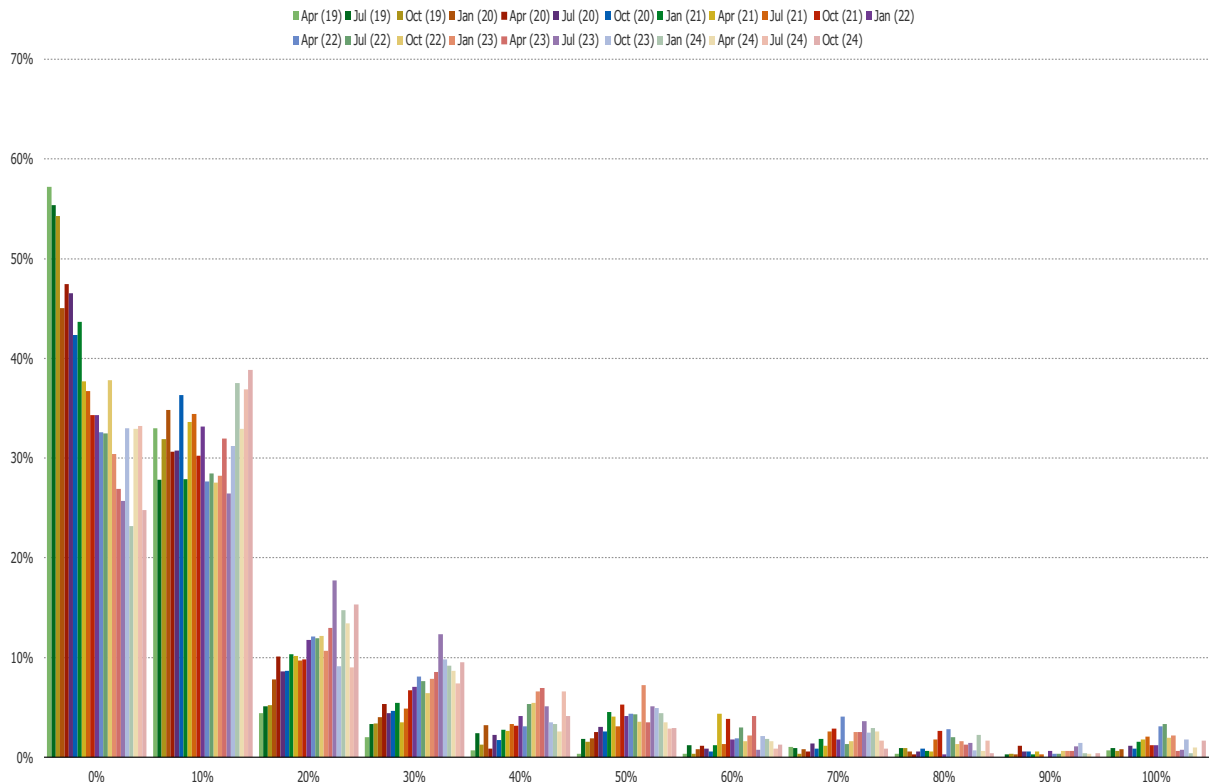


WAYFAIR USERS – EXPECTED USAGE

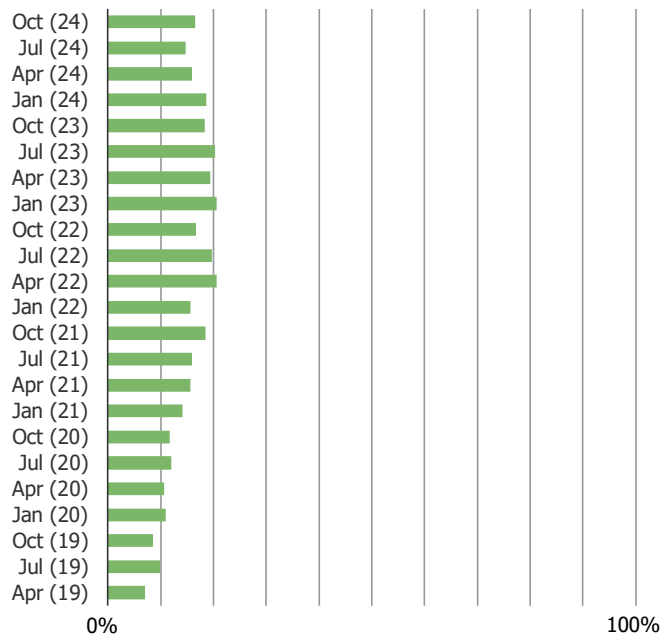


WAYFAIR USERS – WHAT PERCENTAGE OF YOUR TOTAL FURNITURE AND HOME FURNISHINGS PURCHASES DO YOU MAKE THROUGH WAYFAIR?

Posed to Wayfair users.

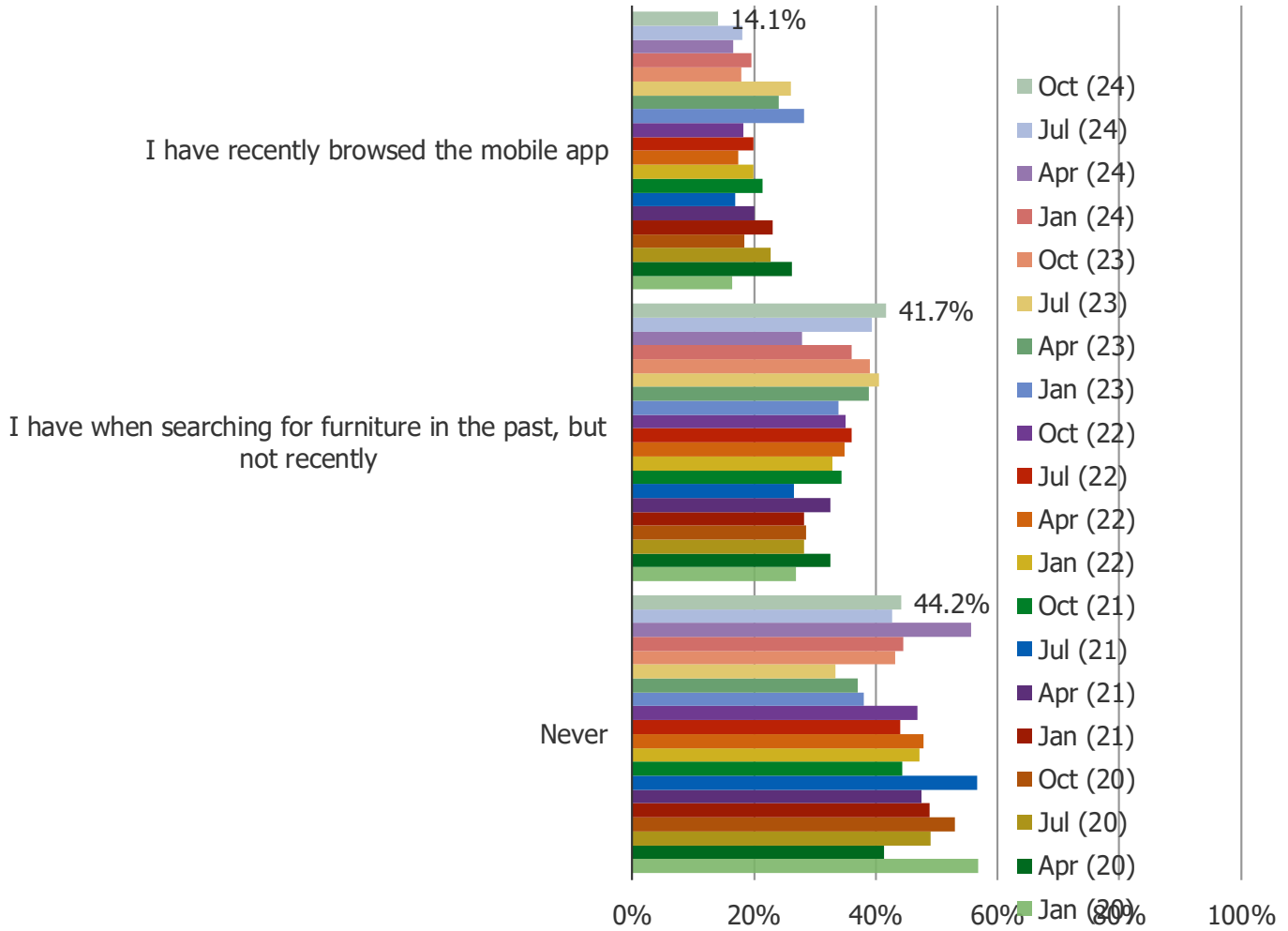


Weighted Average of Chart Above:



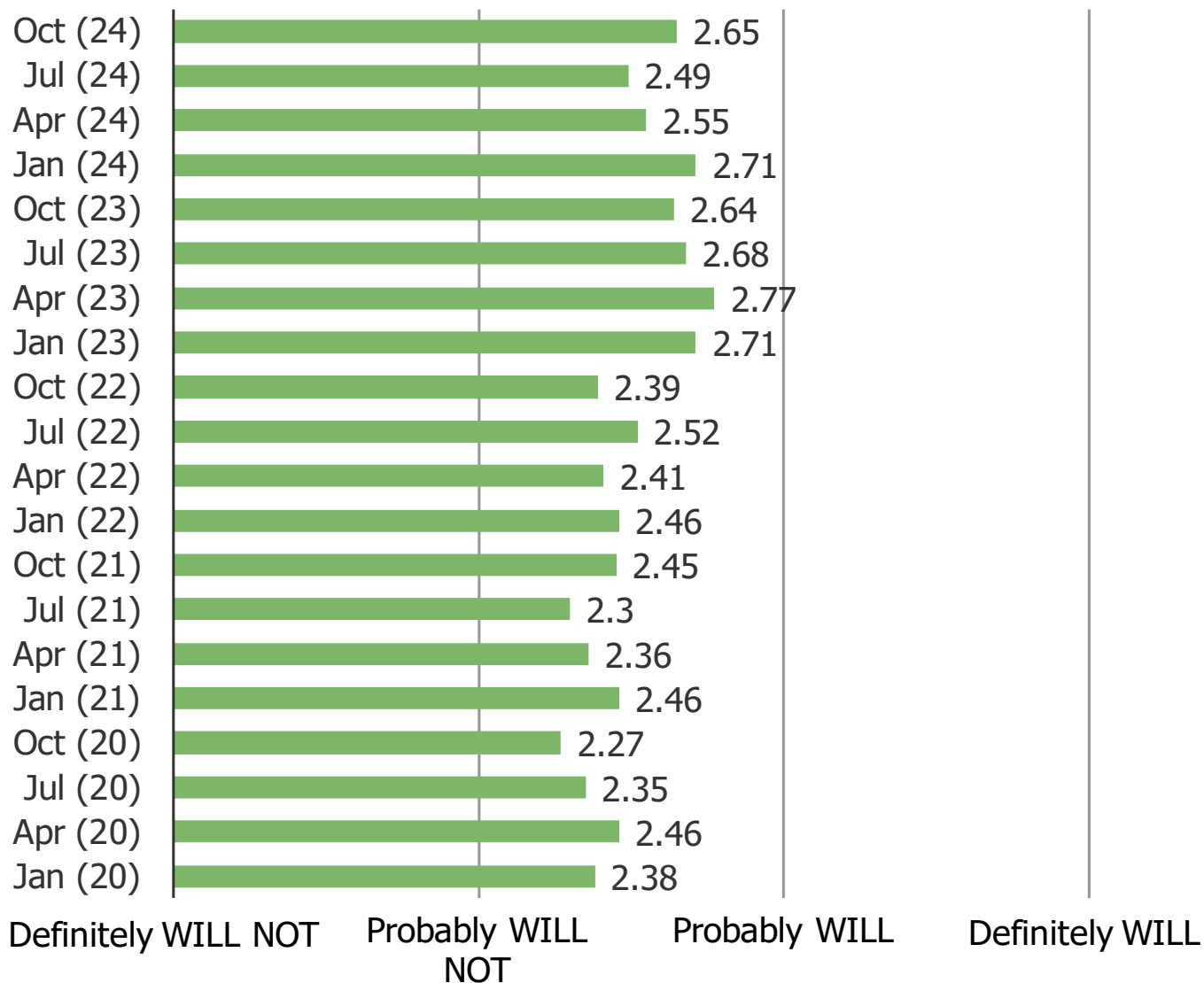
HAVE YOU EVER BROWSED THE WAYFAIR MOBILE APP FOR ITEMS?

Posed to Wayfair users.



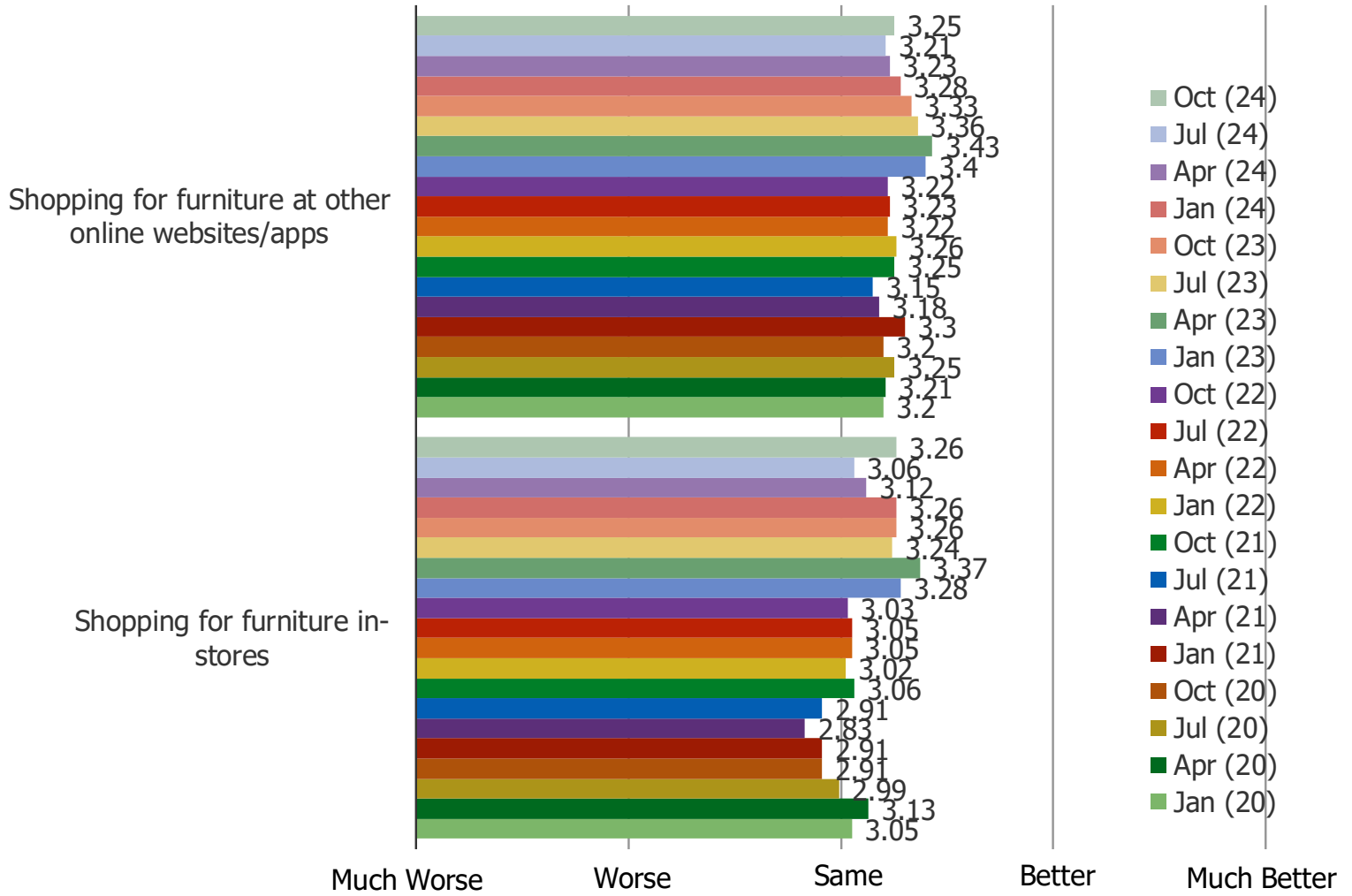
HOW LIKELY ARE YOU TO USE WAYFAIR FOR YOUR NEXT FURNITURE PURCHASE?

Posed to Wayfair users.



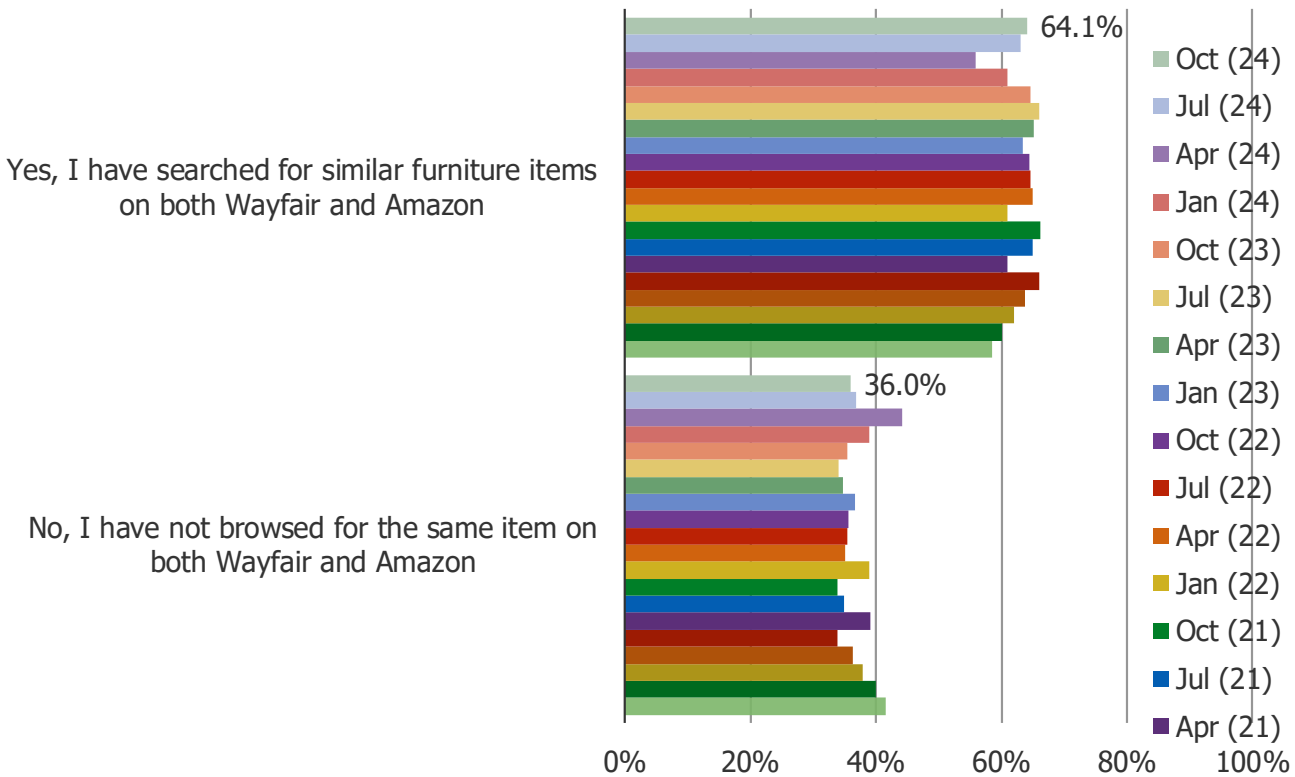
HOW DOES THE WAYFAIR SHOPPING EXPERIENCE COMPARE TO...

Posed to Wayfair users.



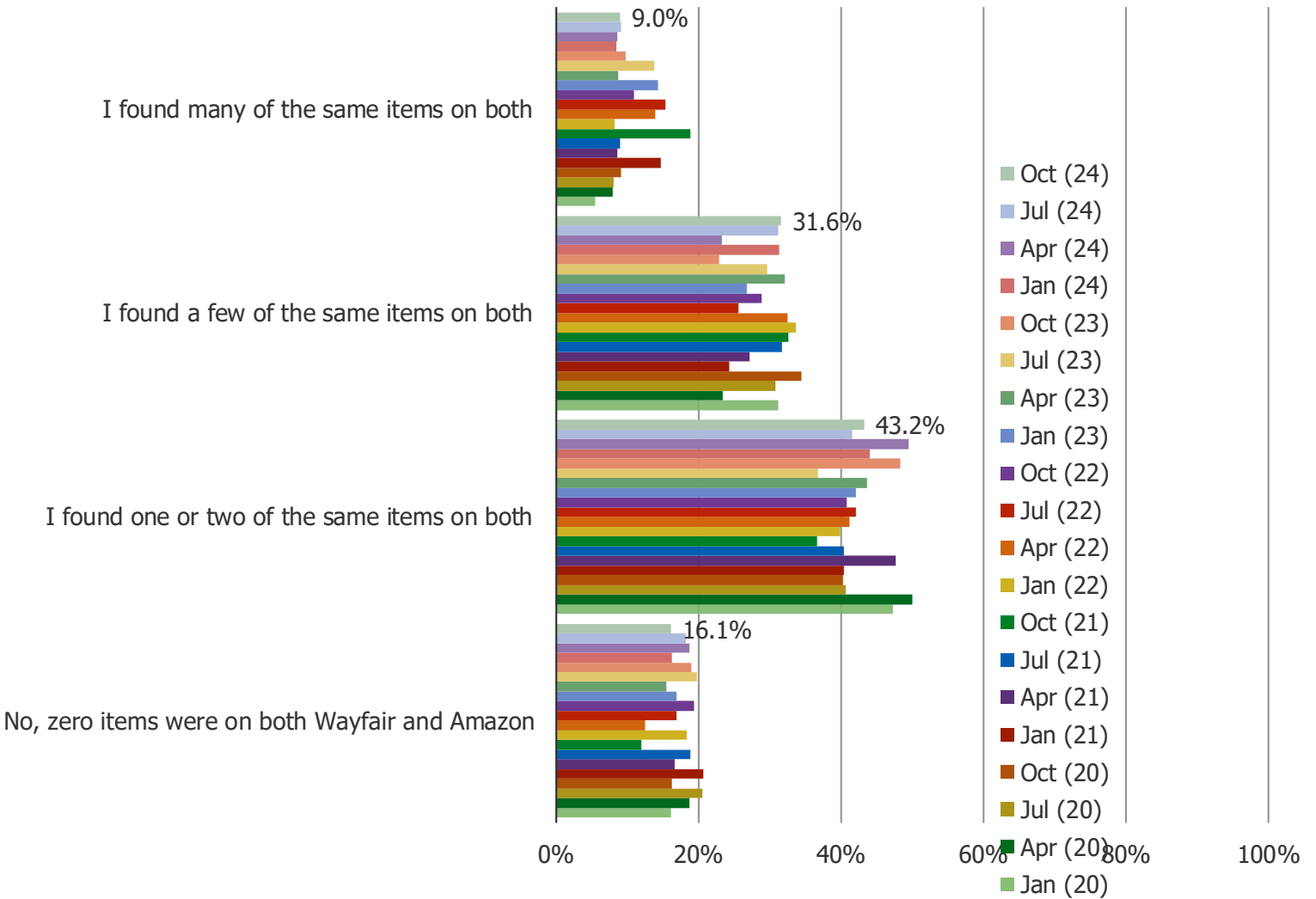
HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.



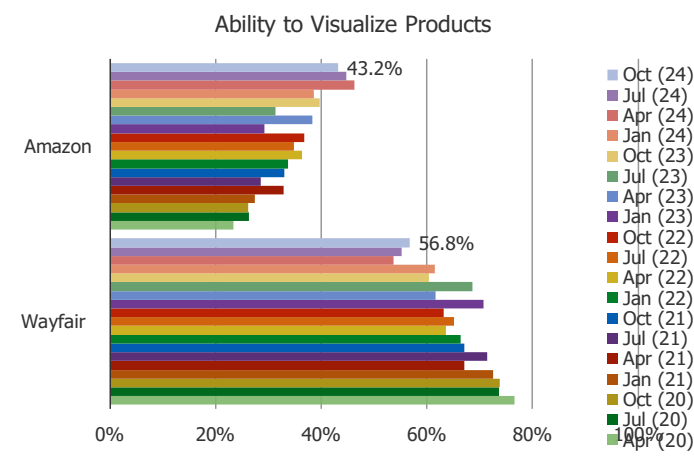
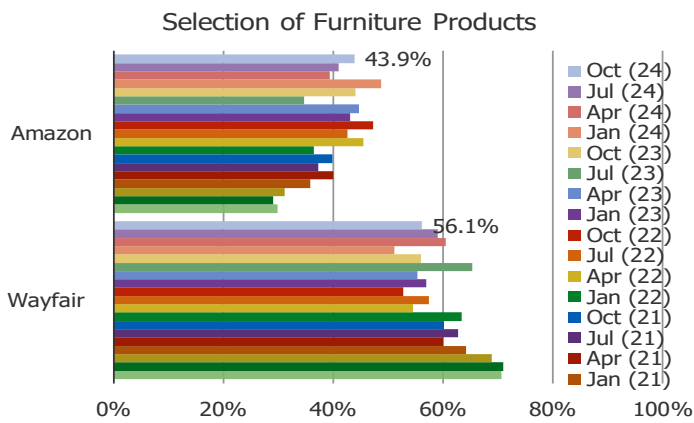
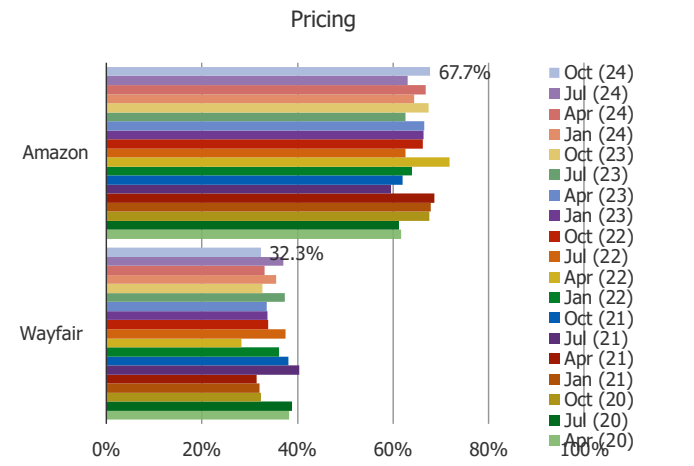
IN THE COURSE OF YOUR SEARCH, DID YOU FIND ANY ITEMS THAT WERE IDENTICAL AND LISTED ON BOTH WAYFAIR AND AMAZON?

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



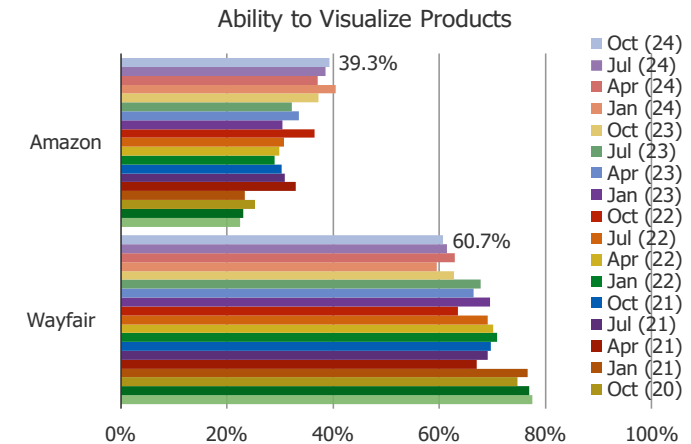
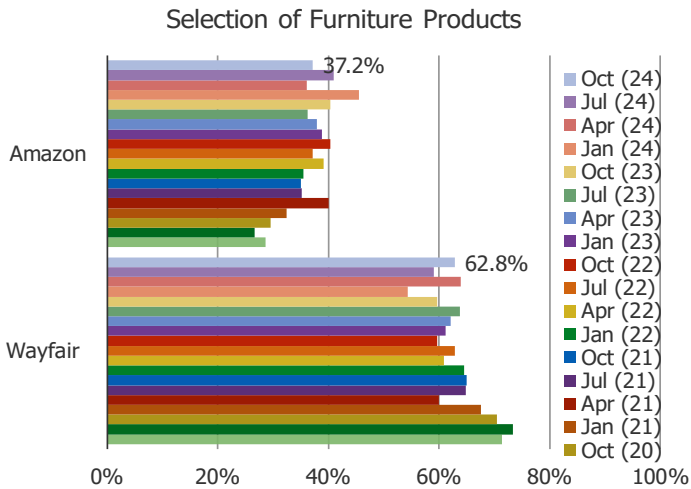
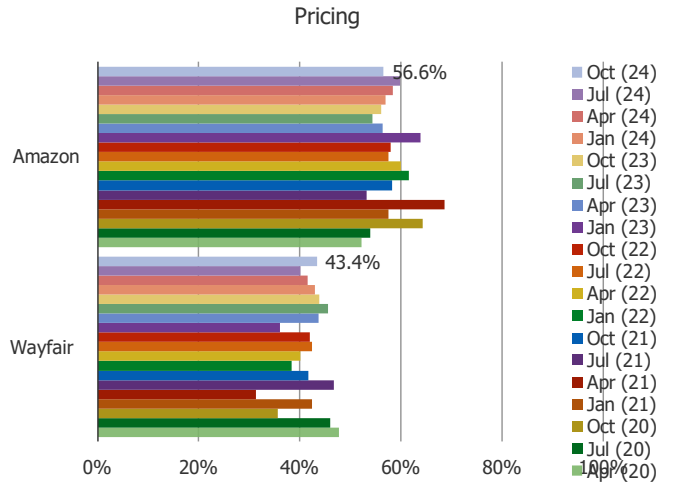
WHEN YOU WERE SHOPPING FOR THE SAME FURNITURE CATEGORY ON BOTH WAYFAIR AND AMAZON, WHICH PLATFORM HAD BETTER...

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



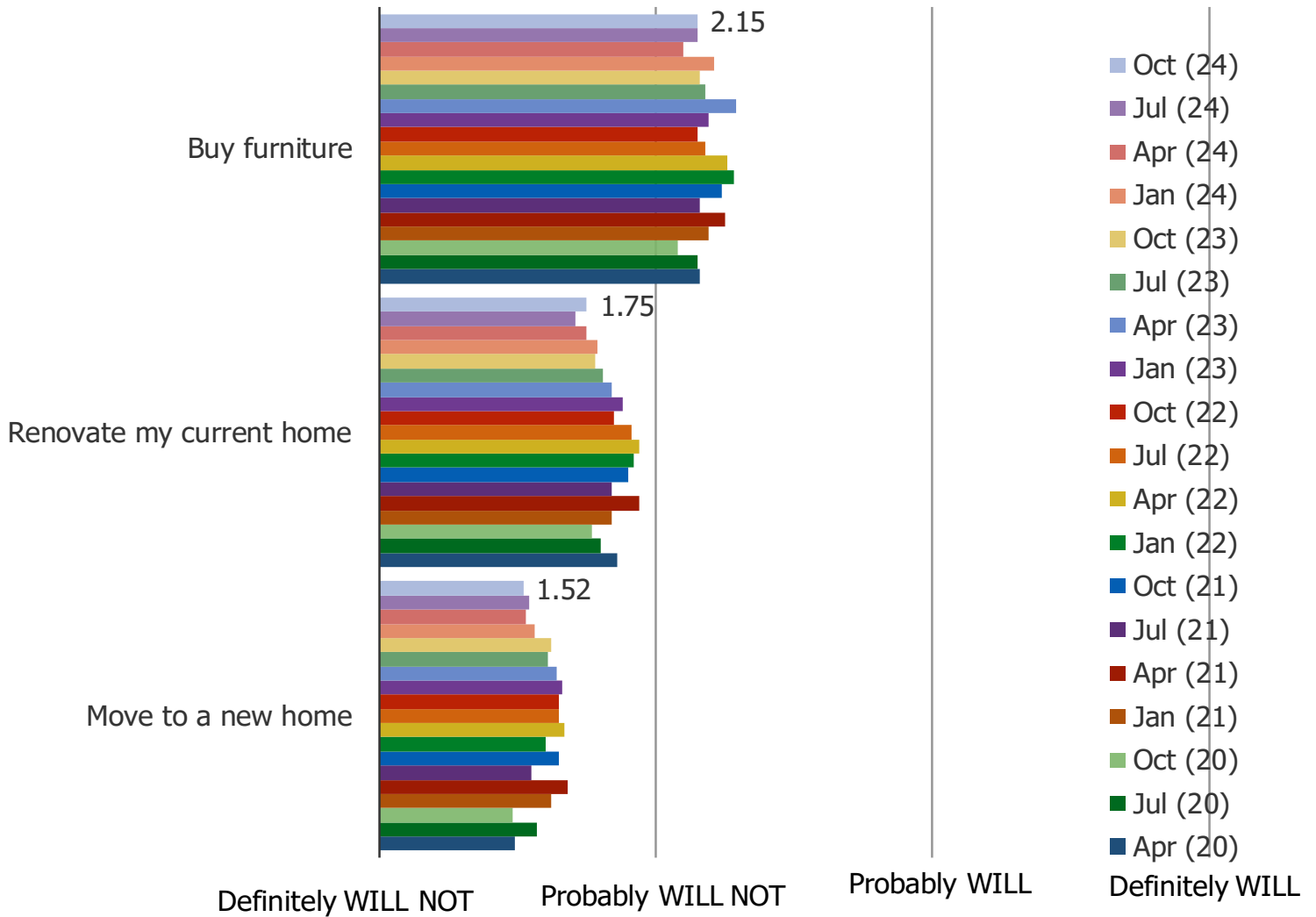
IF YOU NEEDED TO SHOP FOR A TYPE OF FURNITURE TODAY, WHICH PLATFORM DO YOU THINK WOULD HAVE BETTER...

Posed to ALL Wayfair users.



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

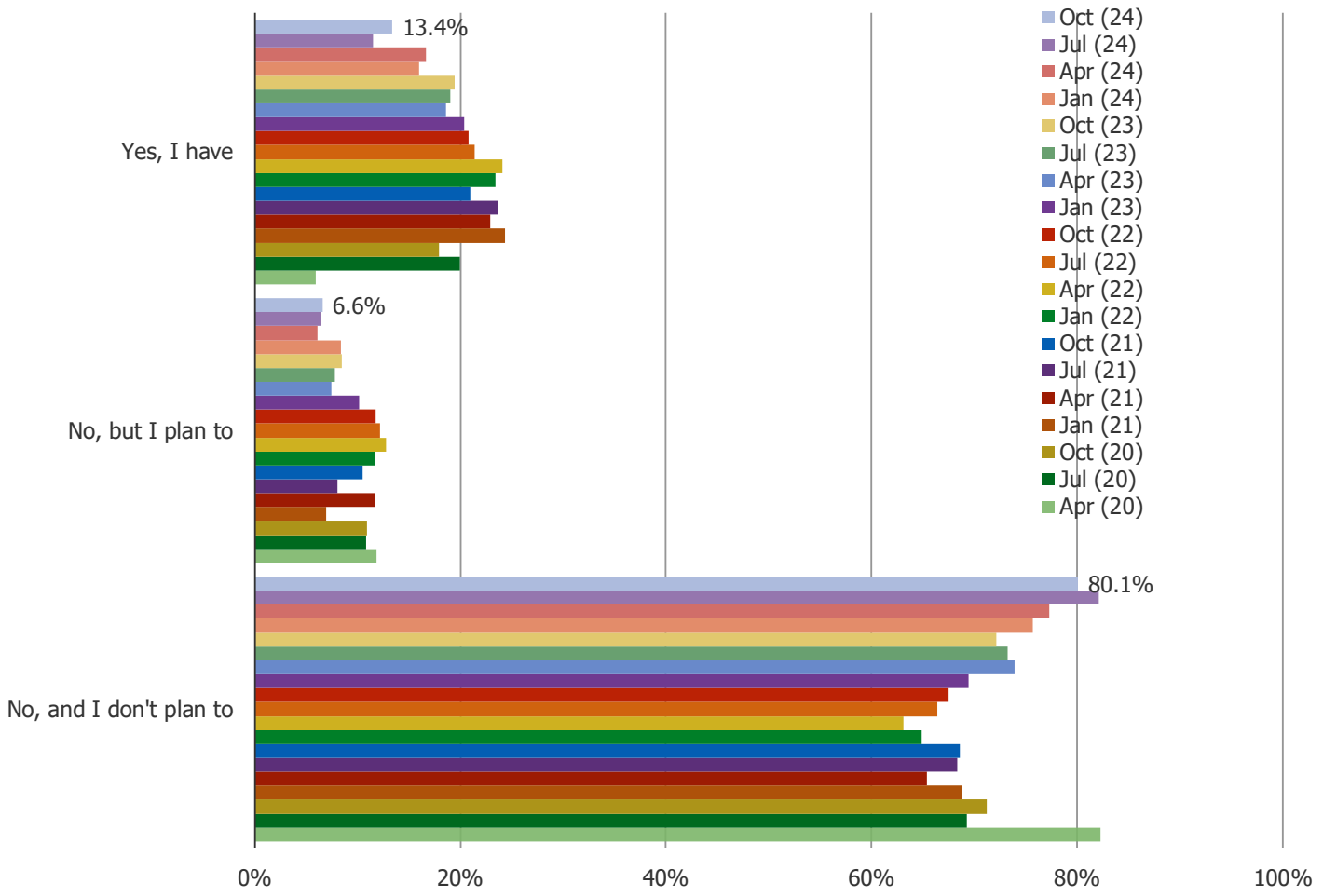
Posed to ALL respondents.



ETSY TRENDS

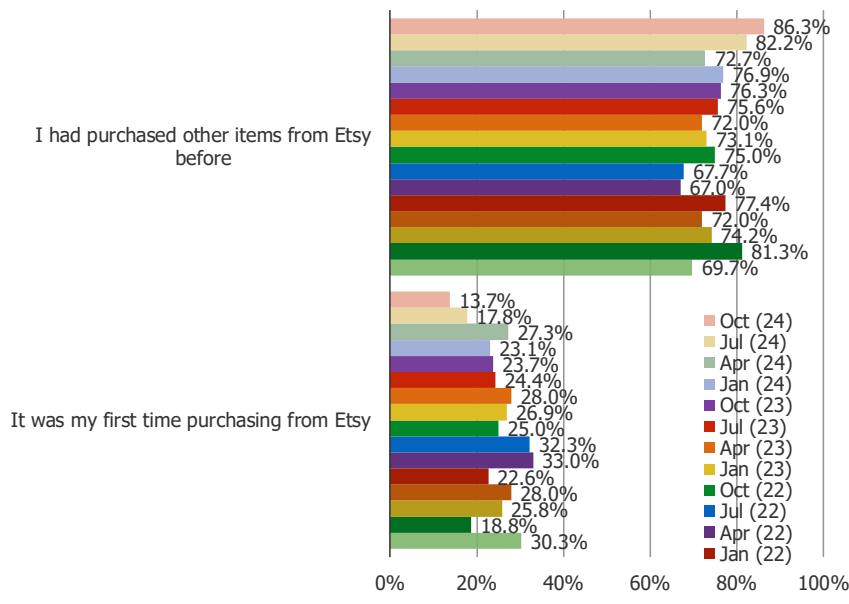
HAVE YOU PURCHASED ANY MASKS / PROTECTIVE FACE MASKS ON ETSY SINCE THE START OF THE PANDEMIC?

Posed to Etsy users.



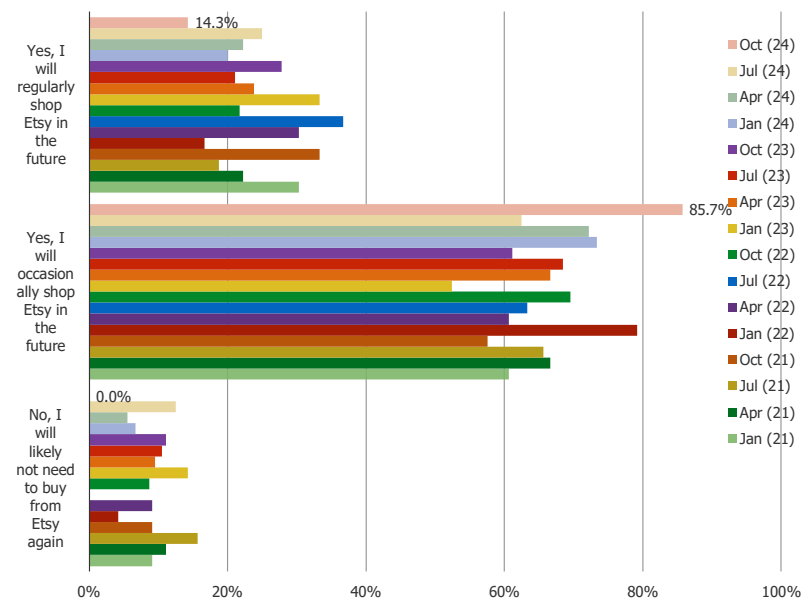
THINKING ABOUT YOUR MASK PURCHASE FROM ETSY, WAS IT YOUR FIRST TIME PURCHASING AN ITEM FROM ETSY OR HAD YOU ALREADY PURCHASED OTHER ITEMS FROM ETSY BEFORE?

Posed to users who purchased a mask from Etsy.

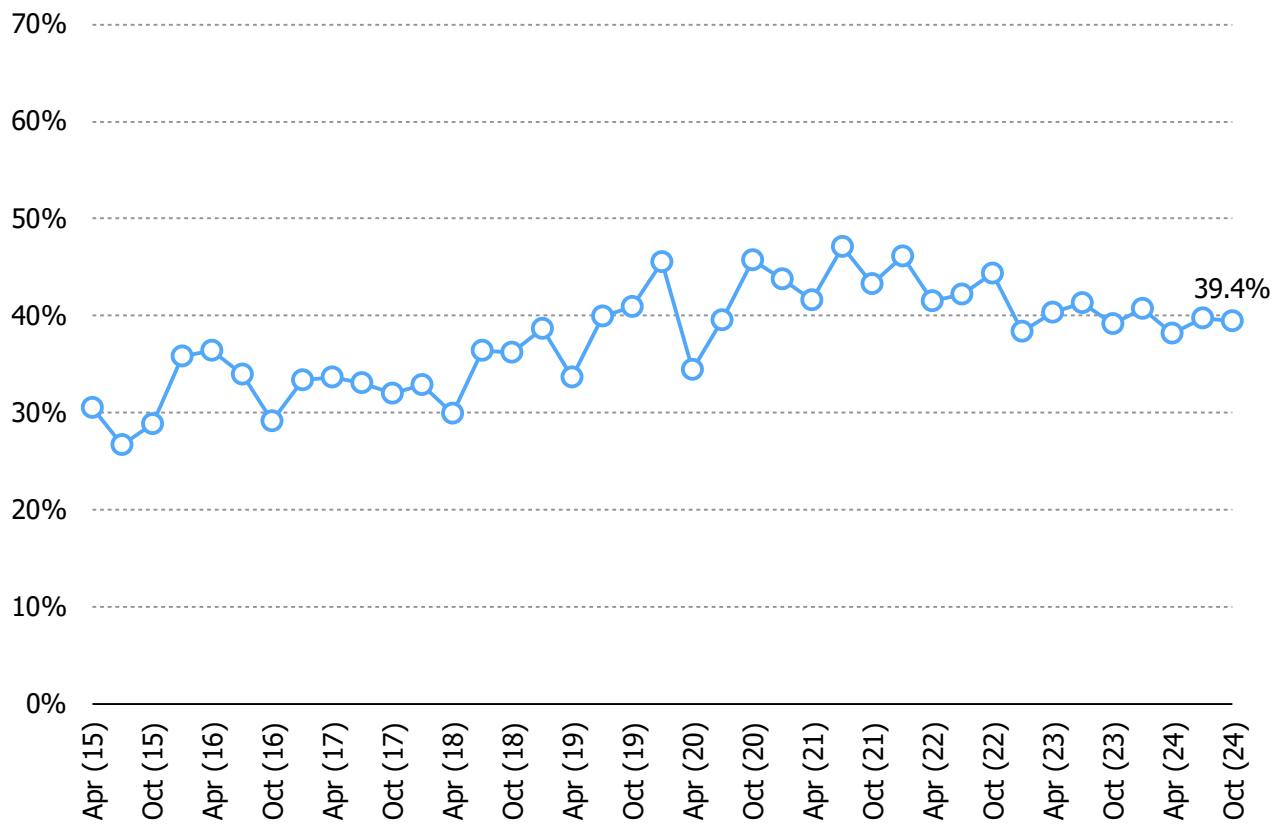


DO YOU EXPECT TO CONTINUE SHOPPING FOR PRODUCTS ON ETSY IN THE FUTURE?

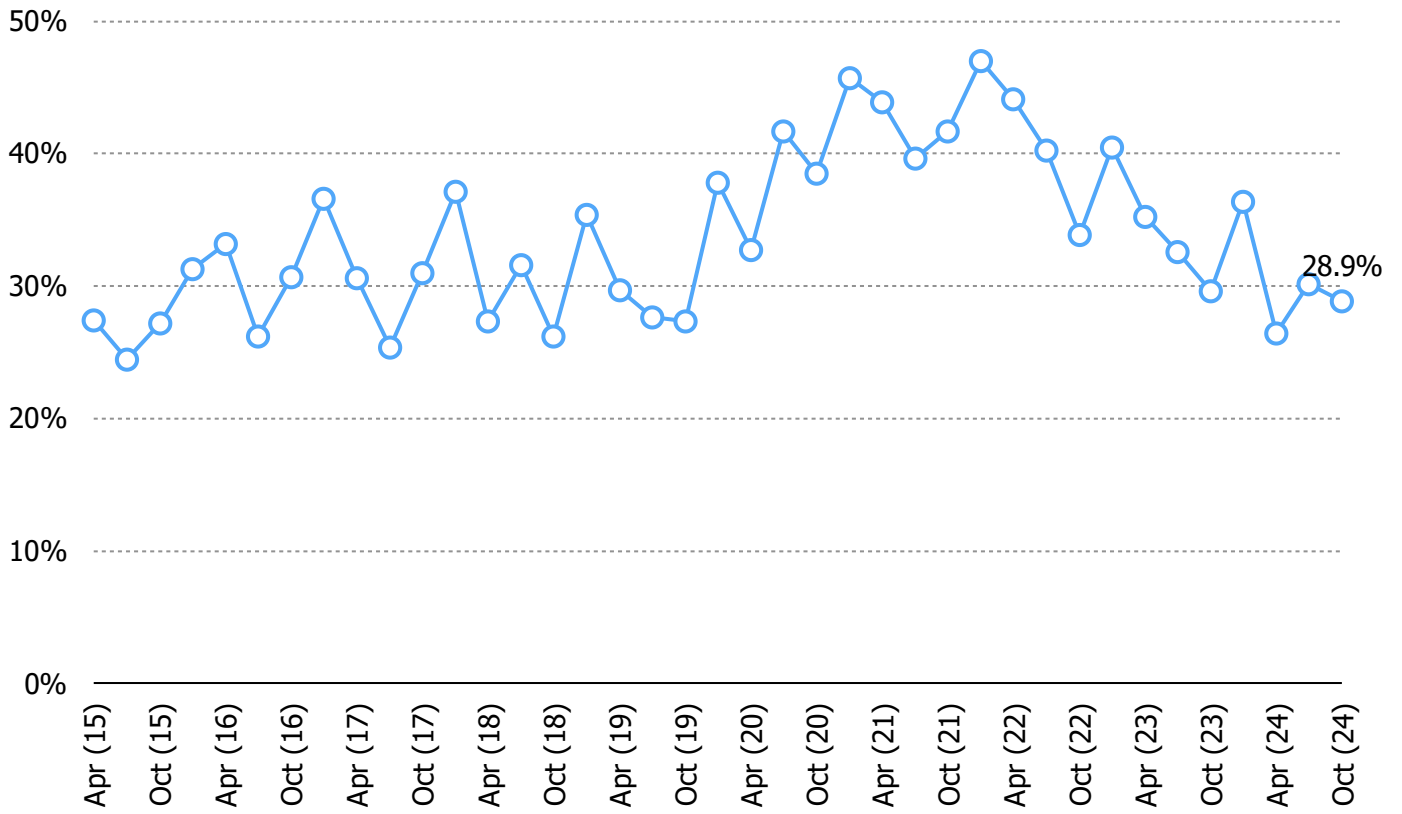
Posed to users whose first purchase from Etsy was a mask.



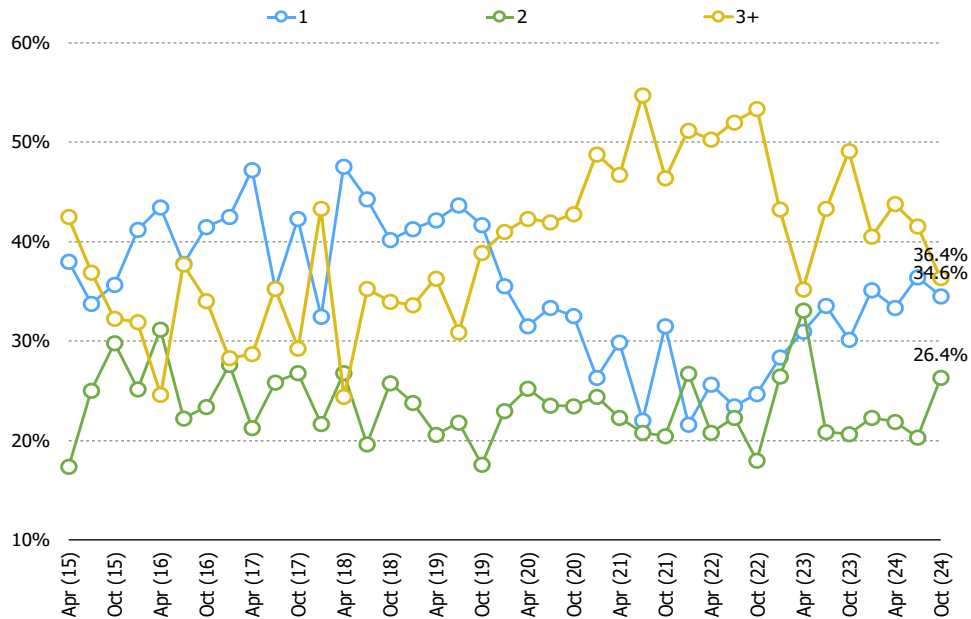
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



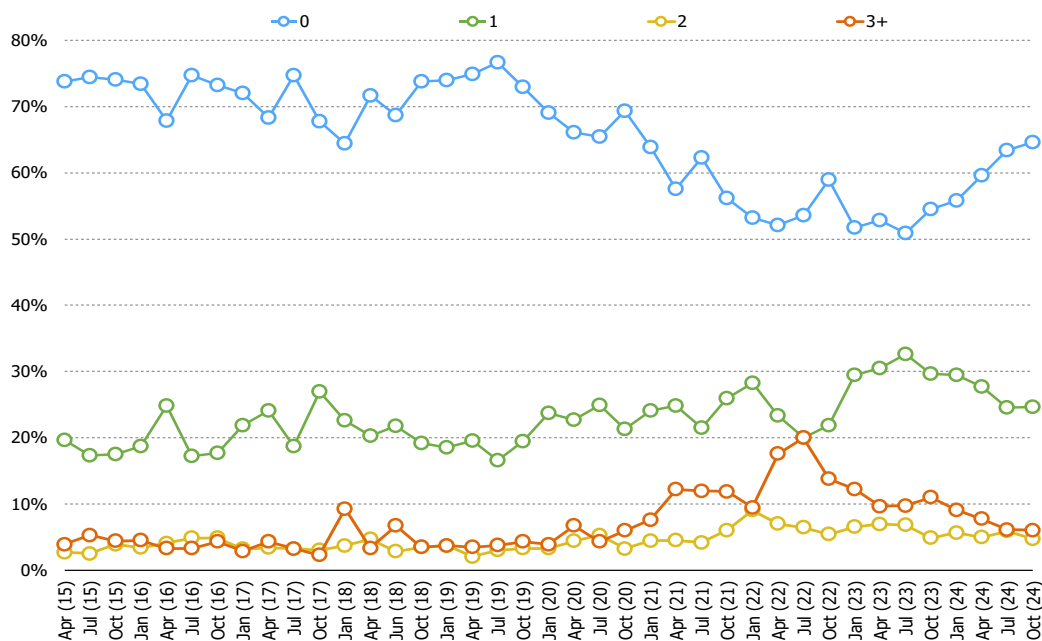
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



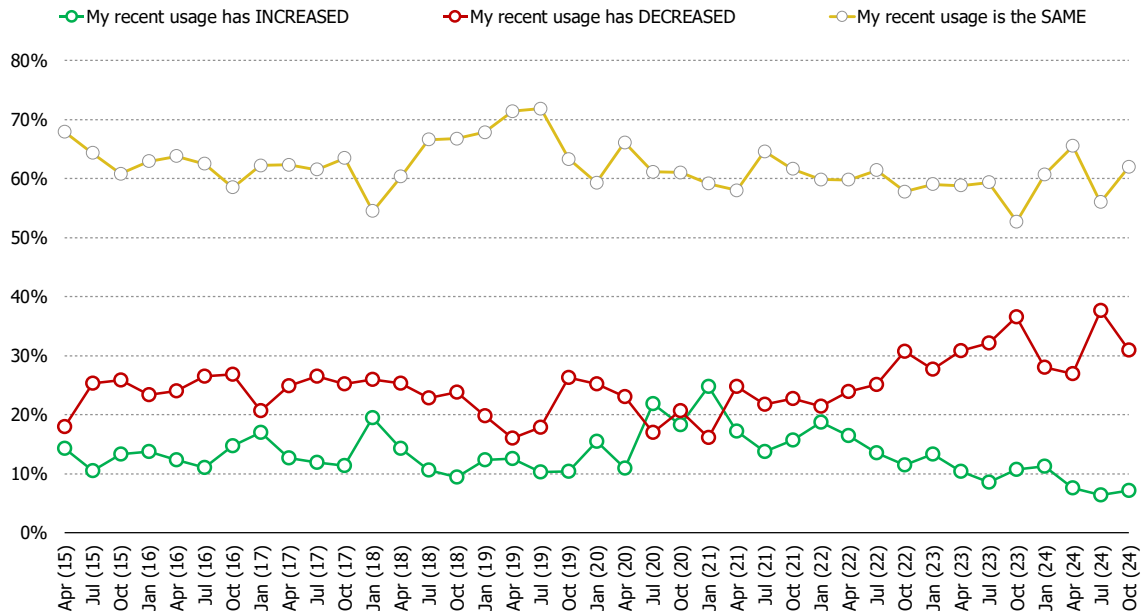
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



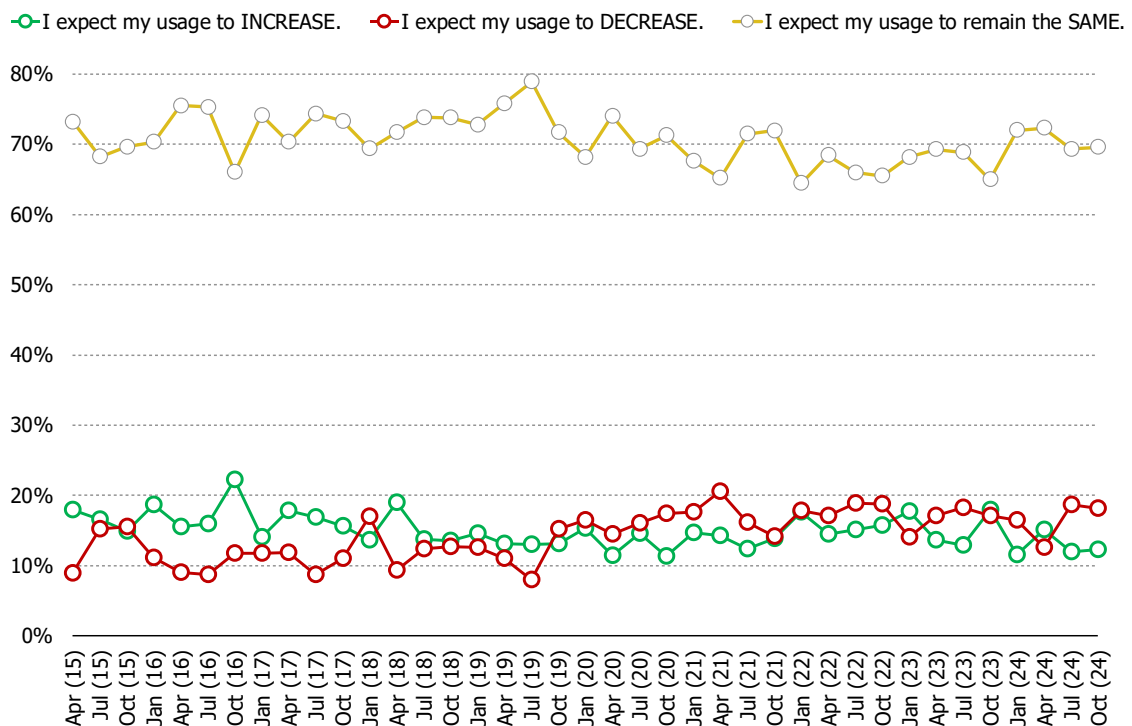
ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH



ETSY USERS – RECENT USAGE

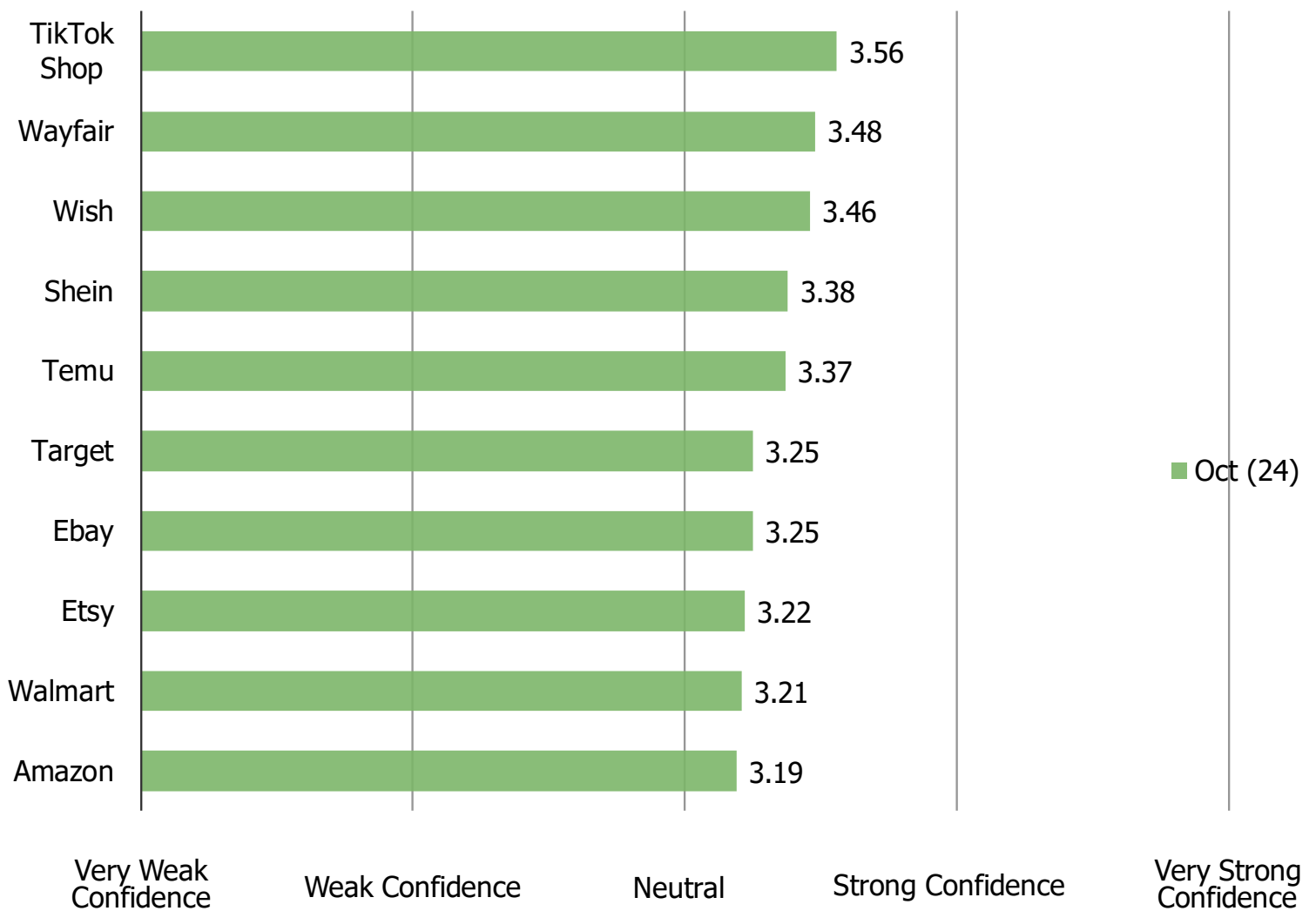


ETSY USERS – EXPECTED USAGE



CROSS-TAB ANALYSIS

CURRENT SPENDING CONFIDENCE OVERALL...

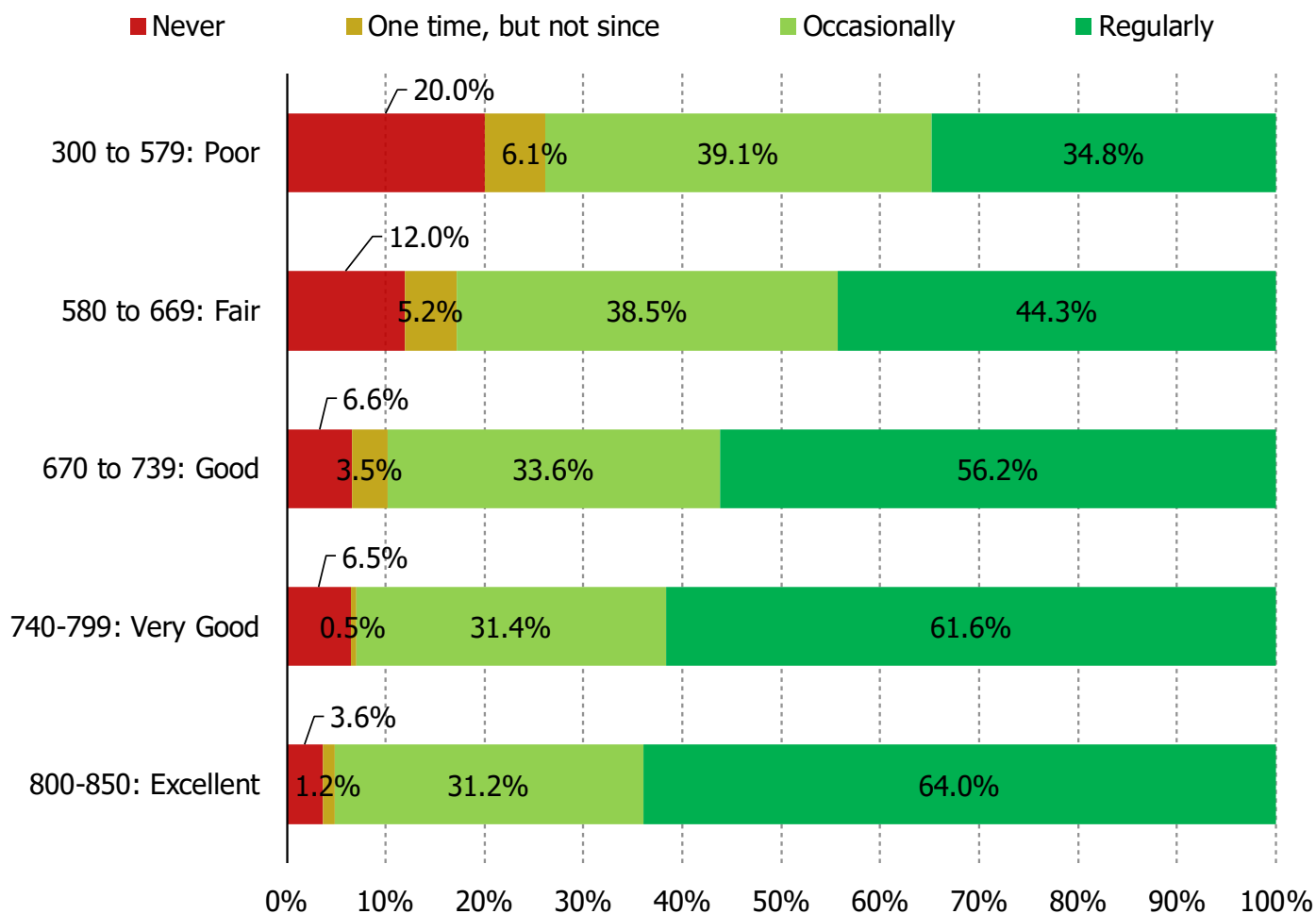


* This chart filters respondents who occasionally or regularly shop each of the above and shows how confident these respondents currently feel overall in spending money.

Experience with Amazon – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

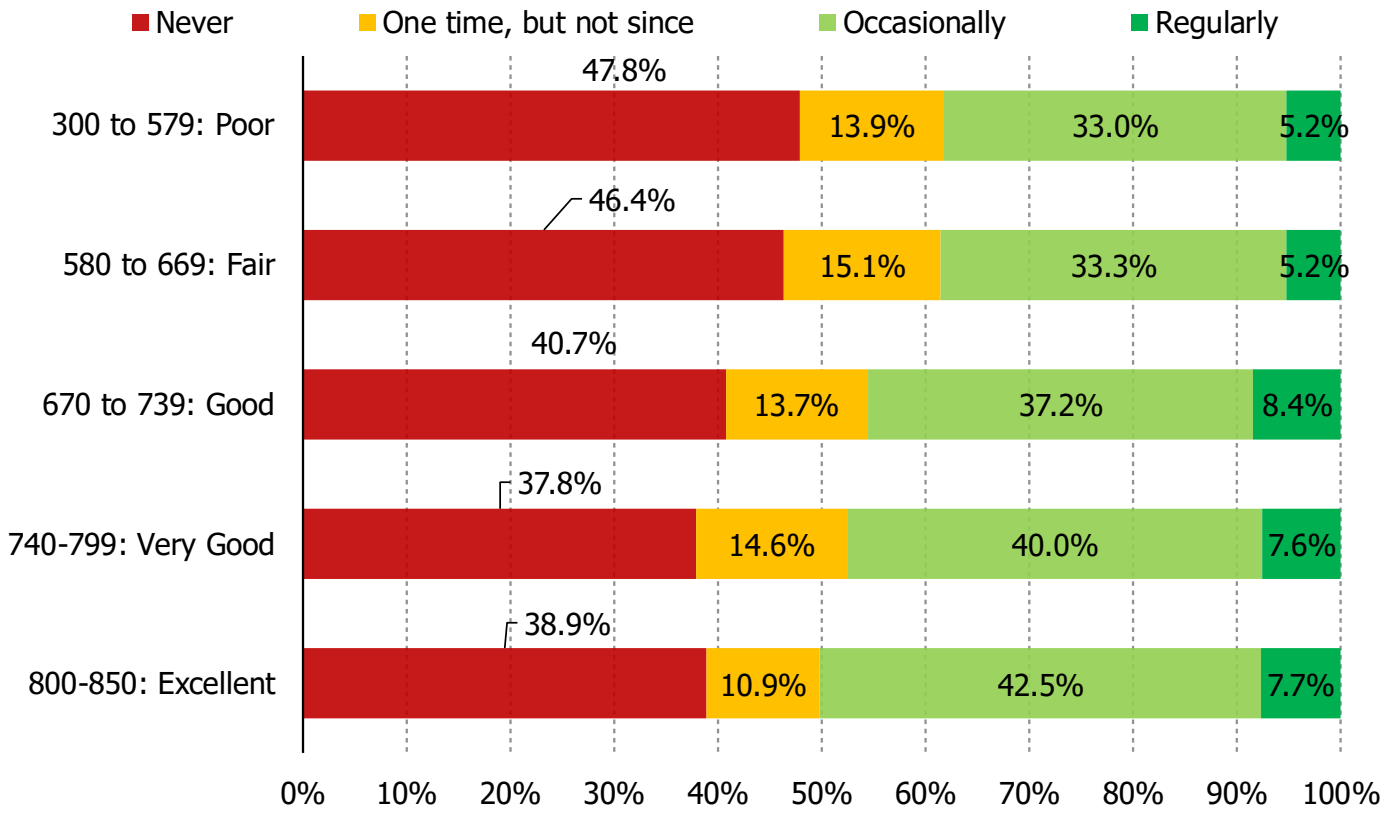


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with eBay – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

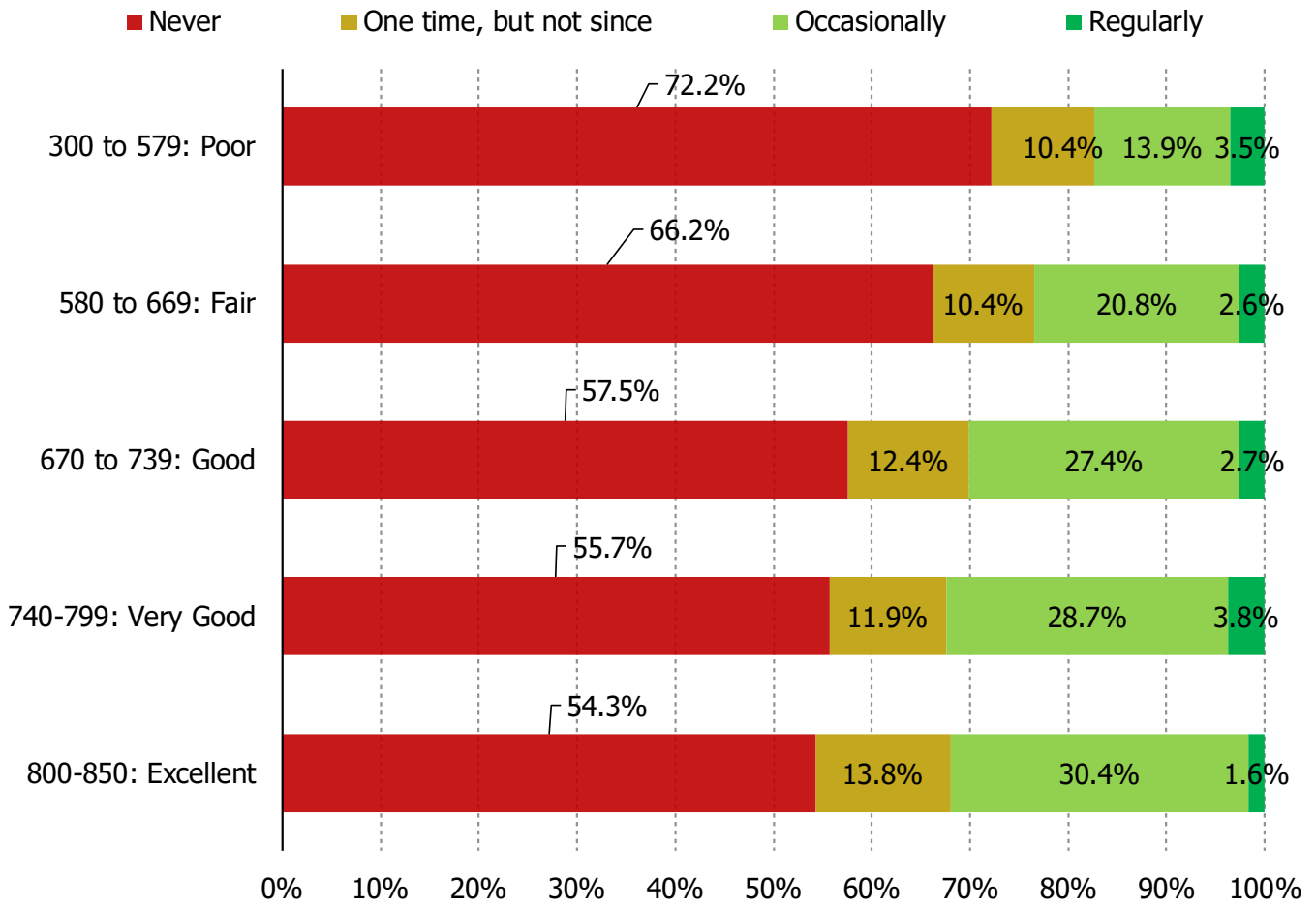


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Etsy – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

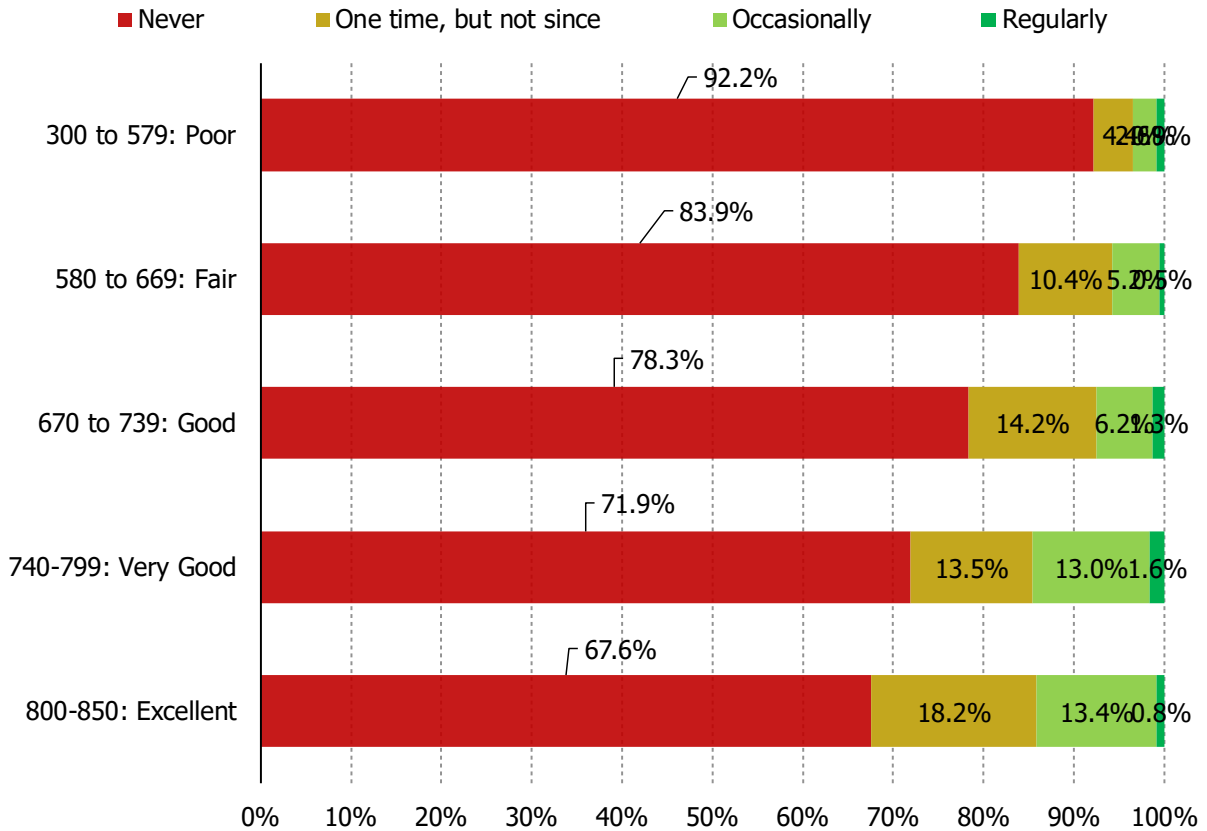


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Overstock – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

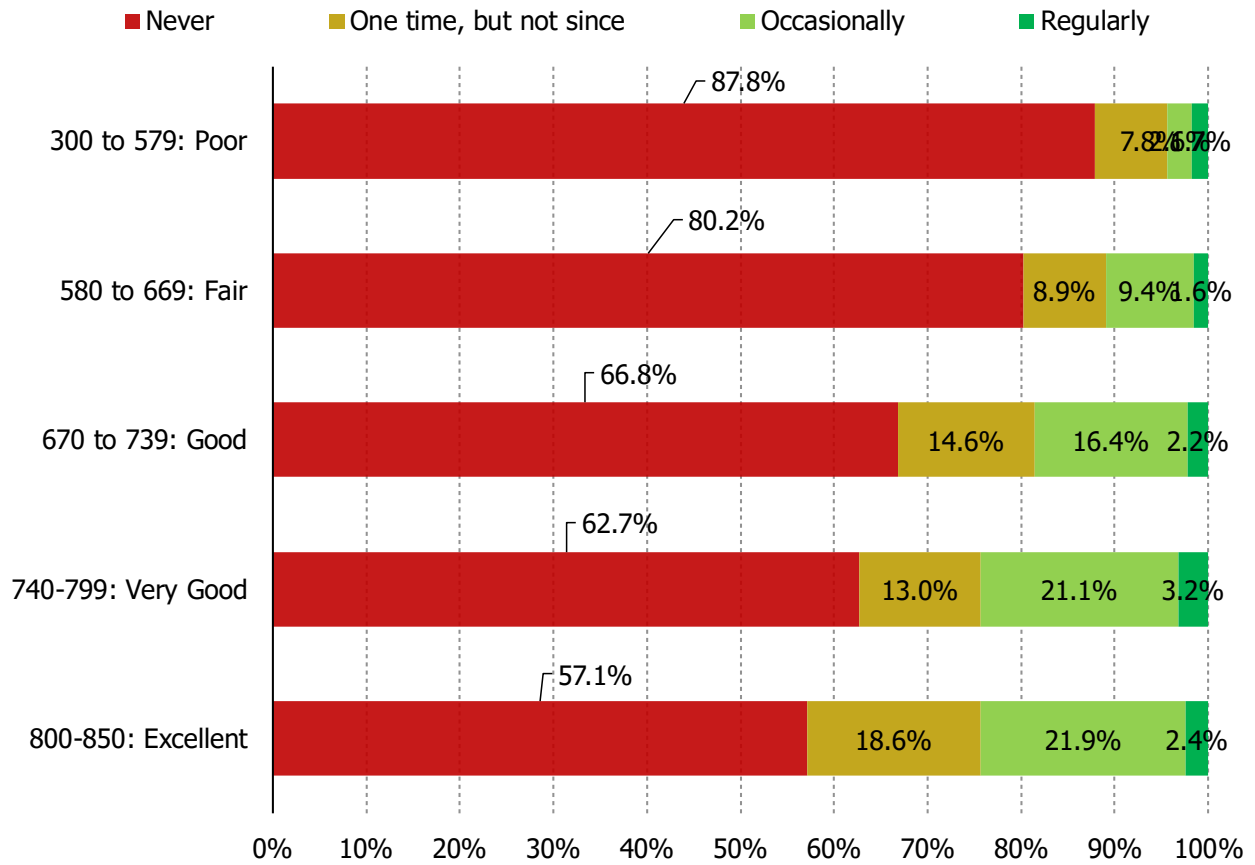


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wayfair – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

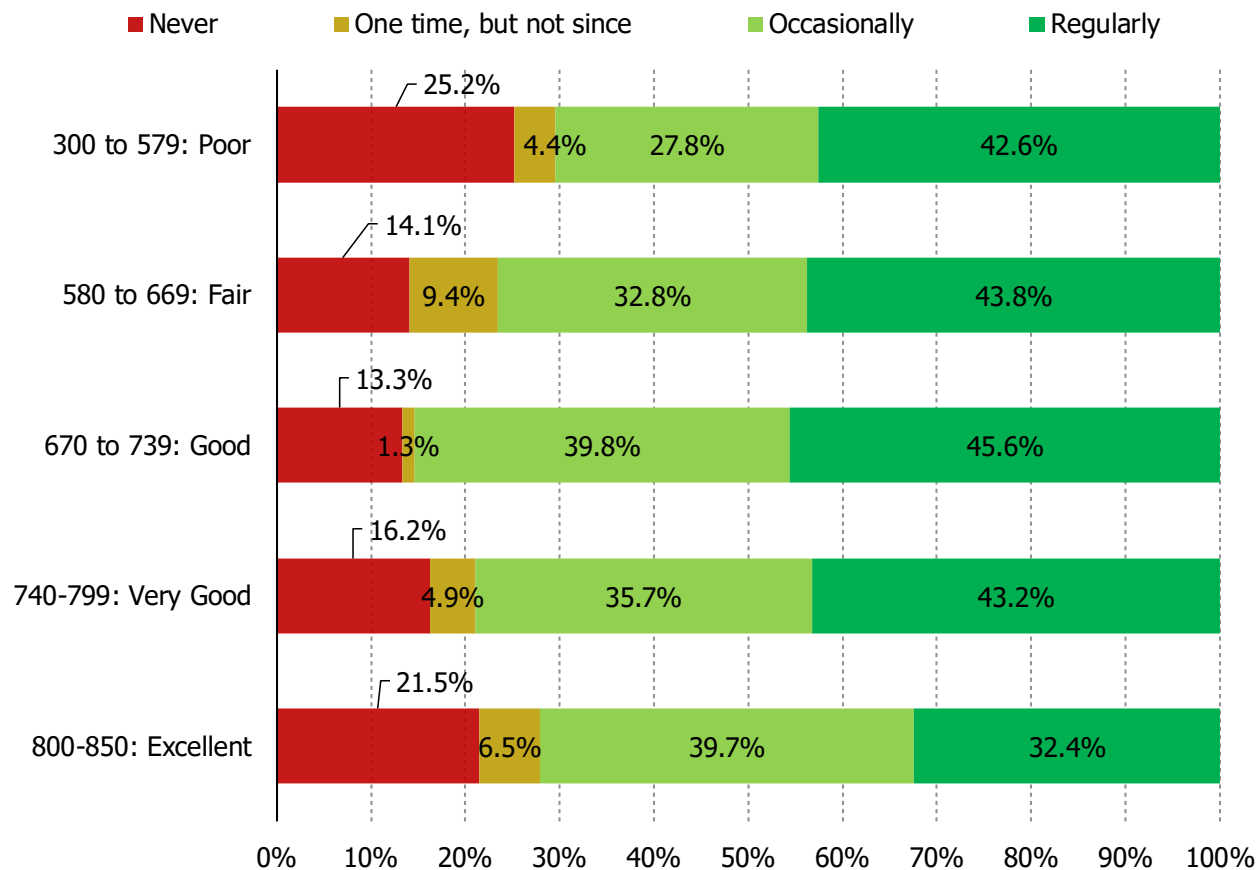


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wal-Mart – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 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

October 2024

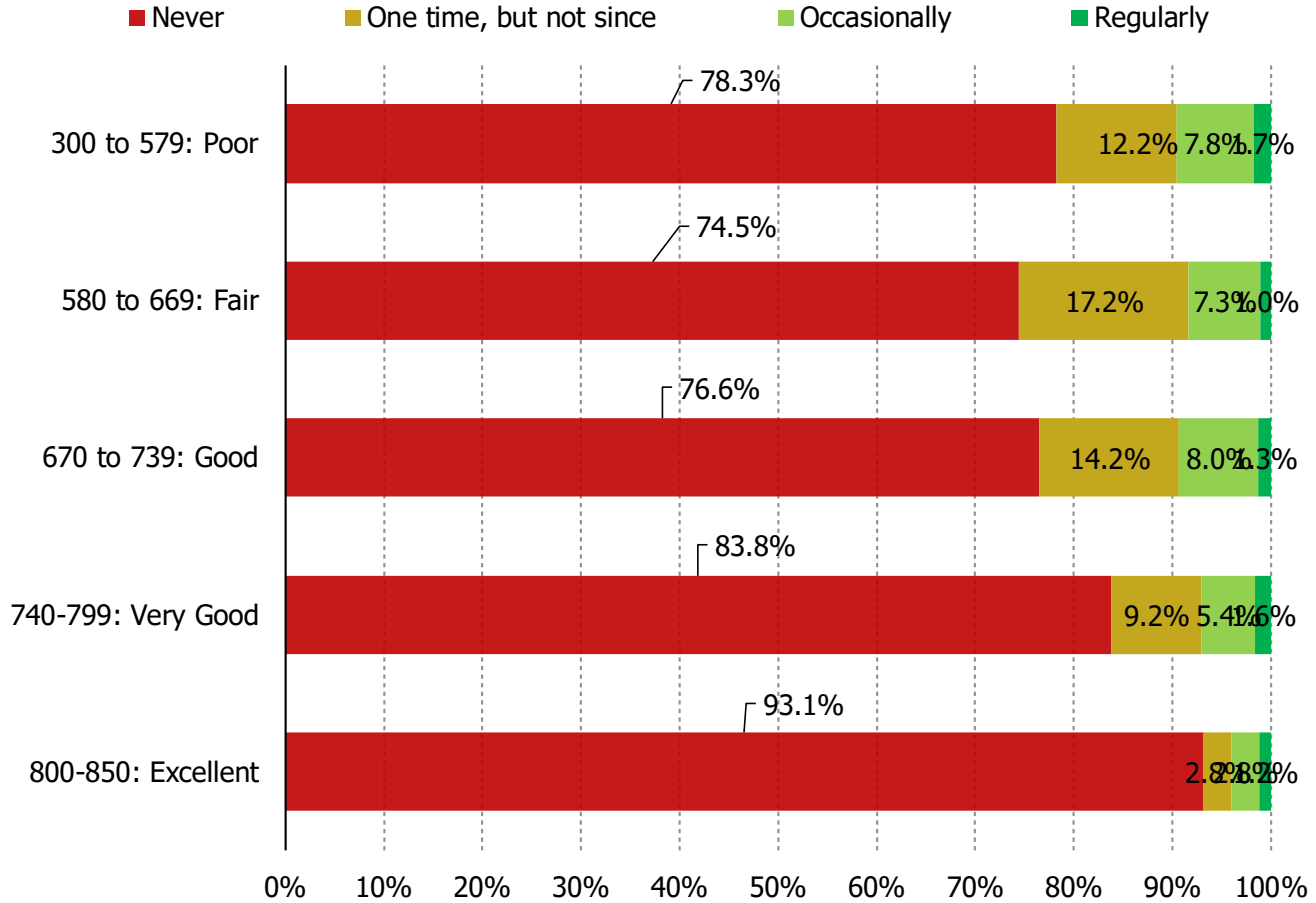


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wish.com – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

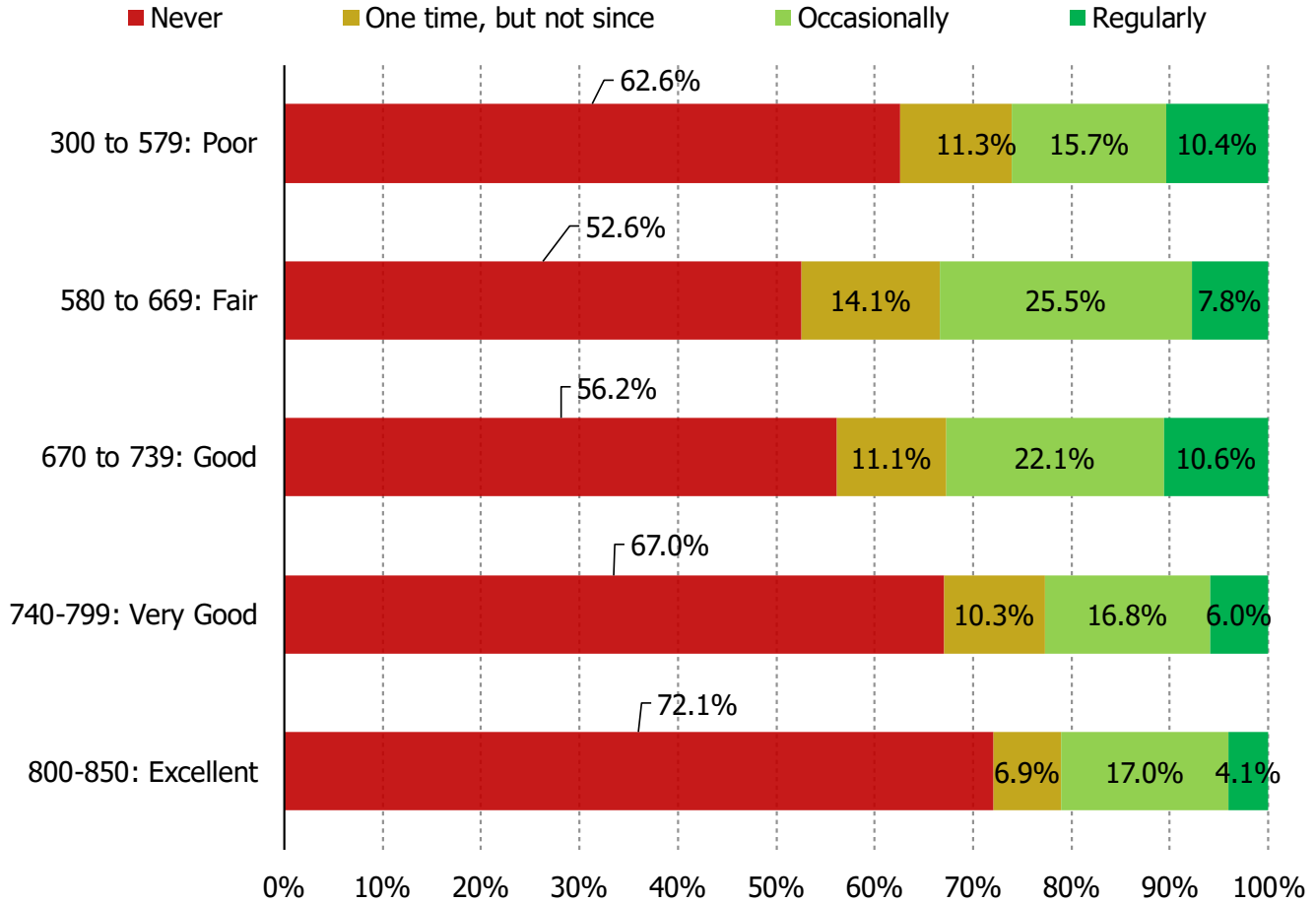


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Temu – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

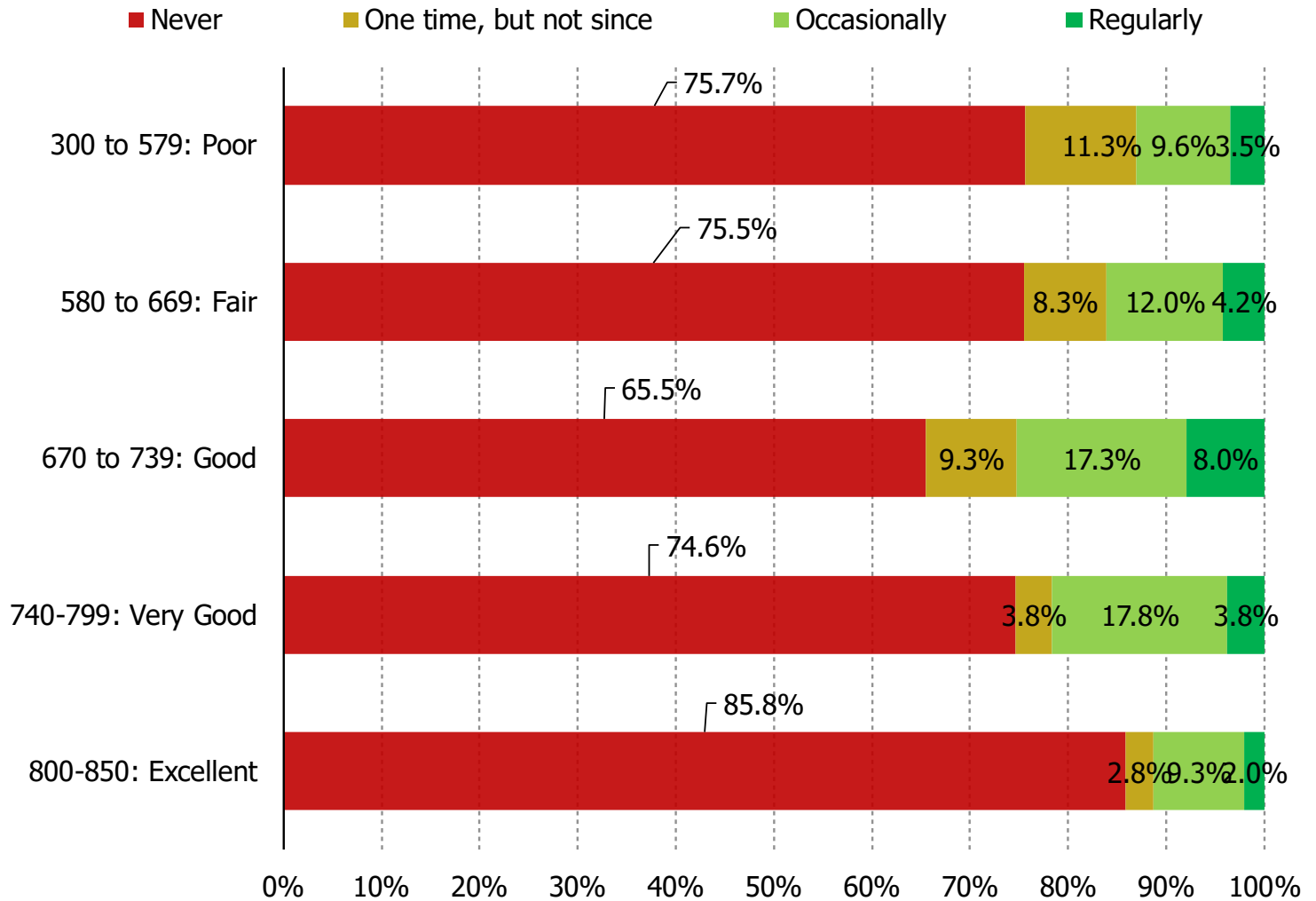


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Shein – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 2024

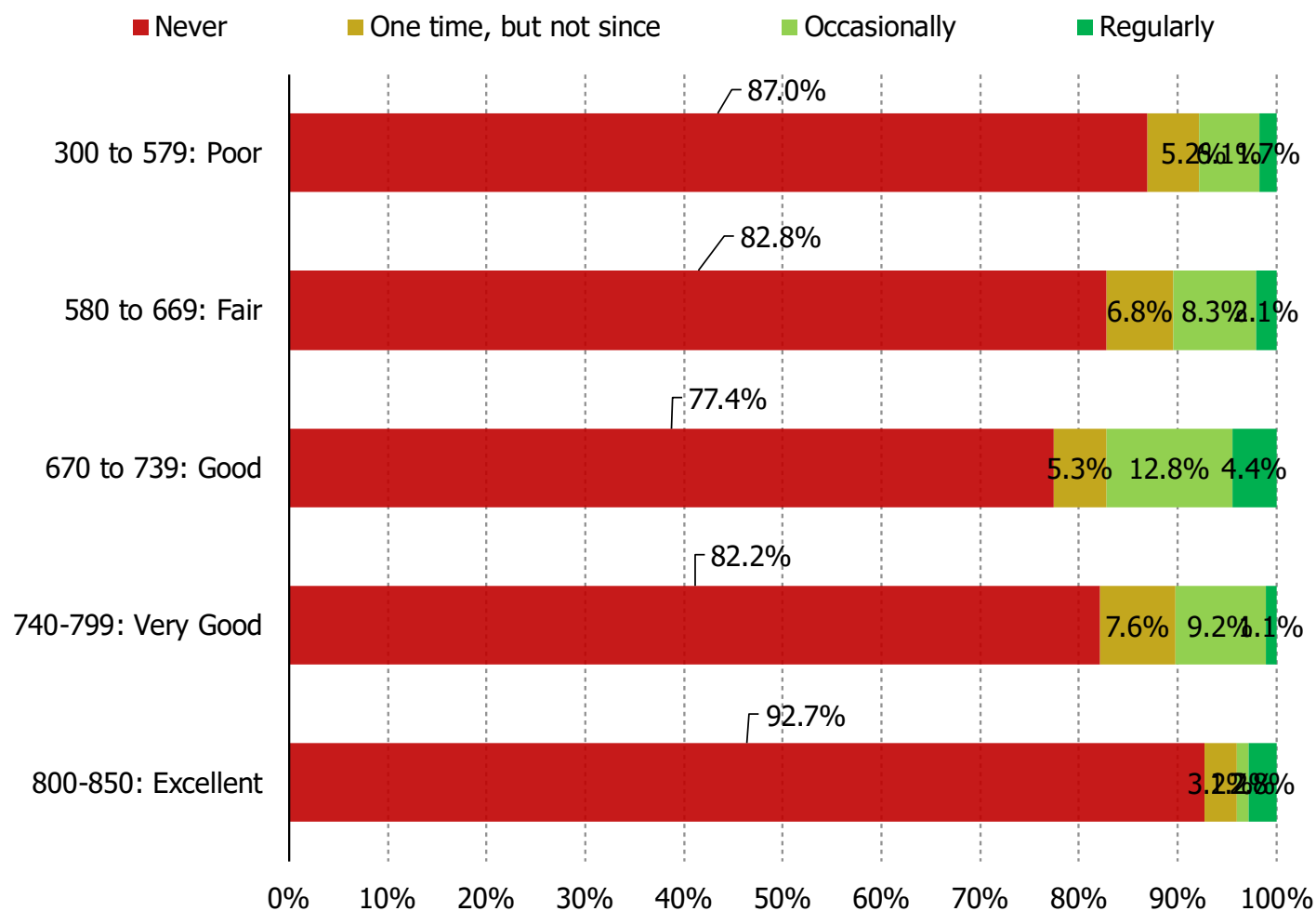


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with TikTok Shop – Purchased items...

BY SELF-REPORTED CREDIT SCORE

October 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.