

Bespoke Survey Research

January 2025

Online Retailers

Volume 48 | Quarterly Survey

1,000 US Consumers Balanced To Census

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

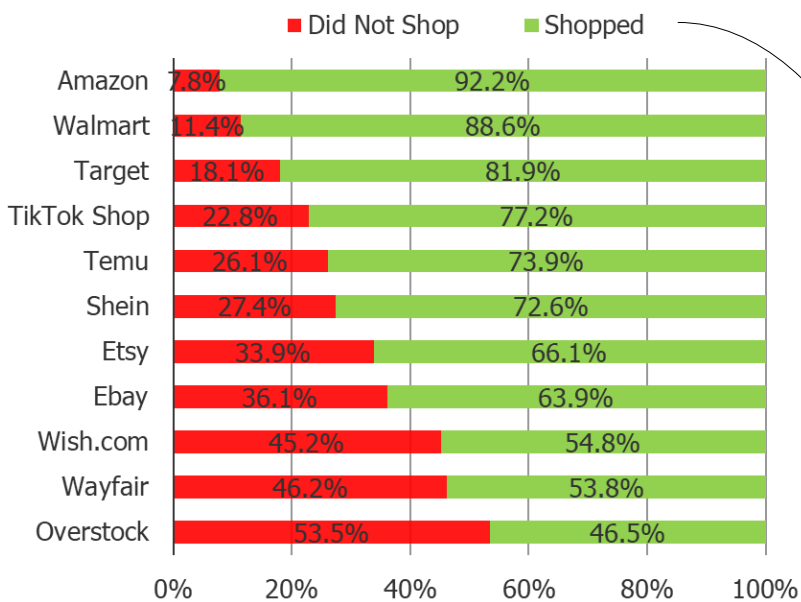
Key Takeaways:

- ❑ Among those who shopped each retailer during the holiday season this year, customers self-report spending more, on net, than last year with the following: Amazon, TikTok Shop, Wal-Mart, Shein, Temu, and Target.
- ❑ Around a third of Wayfair customers would be interested in a paid loyalty program with Wayfair. When it comes to cross-shopping Amazon and Wayfair for the same items, customers have consistently felt that Amazon is better for pricing and Wayfair is better for selection and ability to visualize products (however, sentiment has been shifting toward Amazon for the latter two attributes).
- ❑ Platforms in which customers are more likely (relative to the peer basket) to say they know what they are looking for when they visit include Wal-Mart, eBay, Amazon, Target, and Wayfair. Platforms in which customers are more likely (relative to the peer basket) to be just generally browsing include Temu, Wish.com, Shein, TikTok Shop, Overstock, and Etsy.
- ❑ Consumers offer positive and improved feedback on the Etsy search experience. Gift mode also received improved feedback q/q.
- ❑ Customers expect to encounter counterfeit items on platforms like Wish.com, Temu, TikTok Shop, Shein, and eBay more often relative to the peer group we ask about. Customers of Target, Walmart, and Wayfair view counterfeit items as a rarity on those platforms.
- ❑ Consumer confidence to spend money ticked up q/q and came in slightly above our January 2024 reading.
- ❑ Consumers have more trust in Amazon than anyone else in the peer group we test, by a wide margin. After Amazon, Etsy, eBay, and Wayfair garner the strongest trust ratings. Platforms like Wish.com, Temu, TikTok Shop, and Shein have lower trust ratings and have shown declines on this front over time.
- ❑ Prime Loyalty is very strong, with an increasing share (64.5% saying they will be Prime Members for more than 5 more years, setting no end date for when they might stop).
- ❑ Slides tracking self-reported purchase engagement with history: Amazon: 53-57, Wayfair: 59-71, Etsy: 73-78

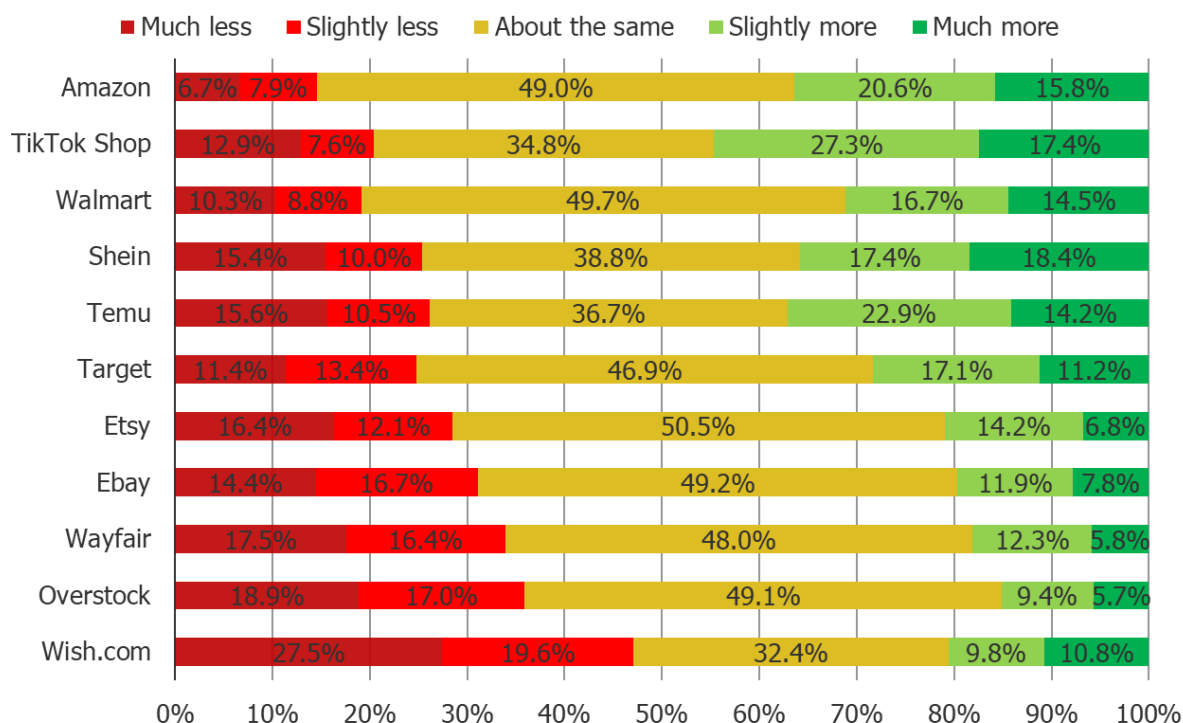
NEW AND RECENTLY ADDED QUESTIONS

HOW WOULD YOU DESCRIBE YOUR LEVEL OF SHOPPING WITH THE FOLLOWING DURING THE HOLIDAY SEASON COMPARED TO LAST YEAR?

Posed to all respondents who shop/browse the below.

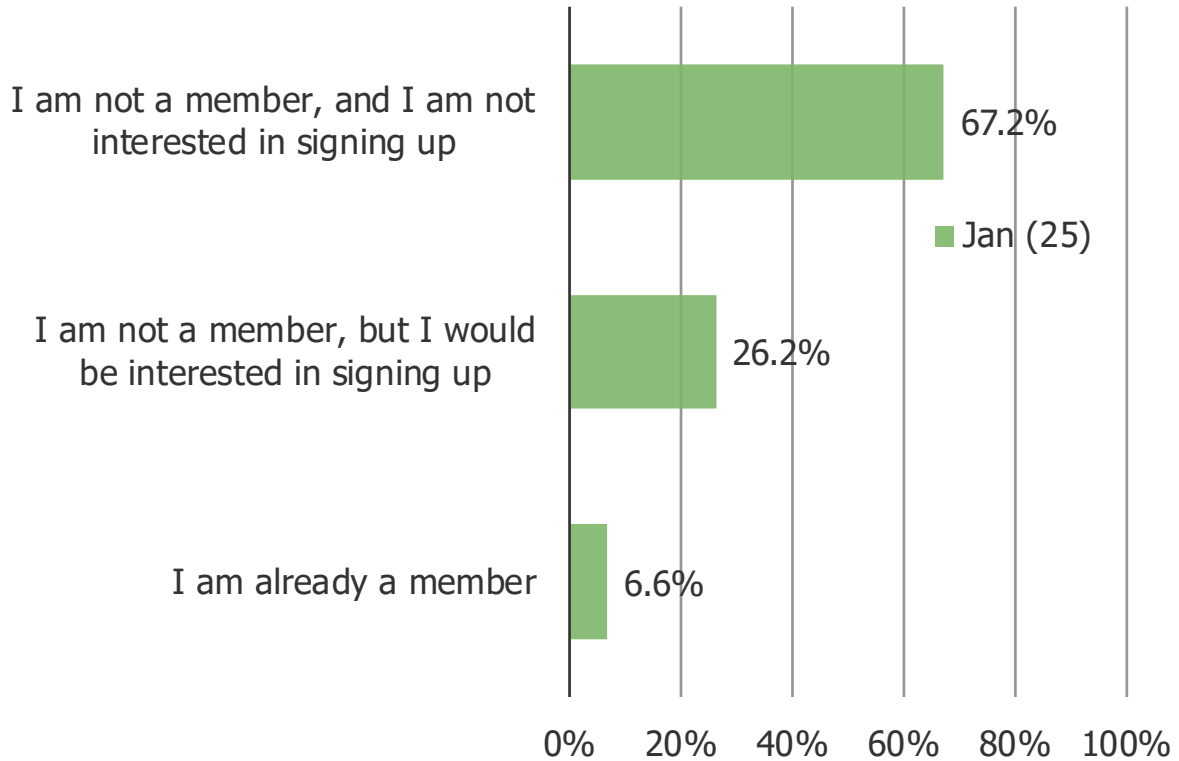


Among those who shopped each this year during the holidays, compare this year to last year...



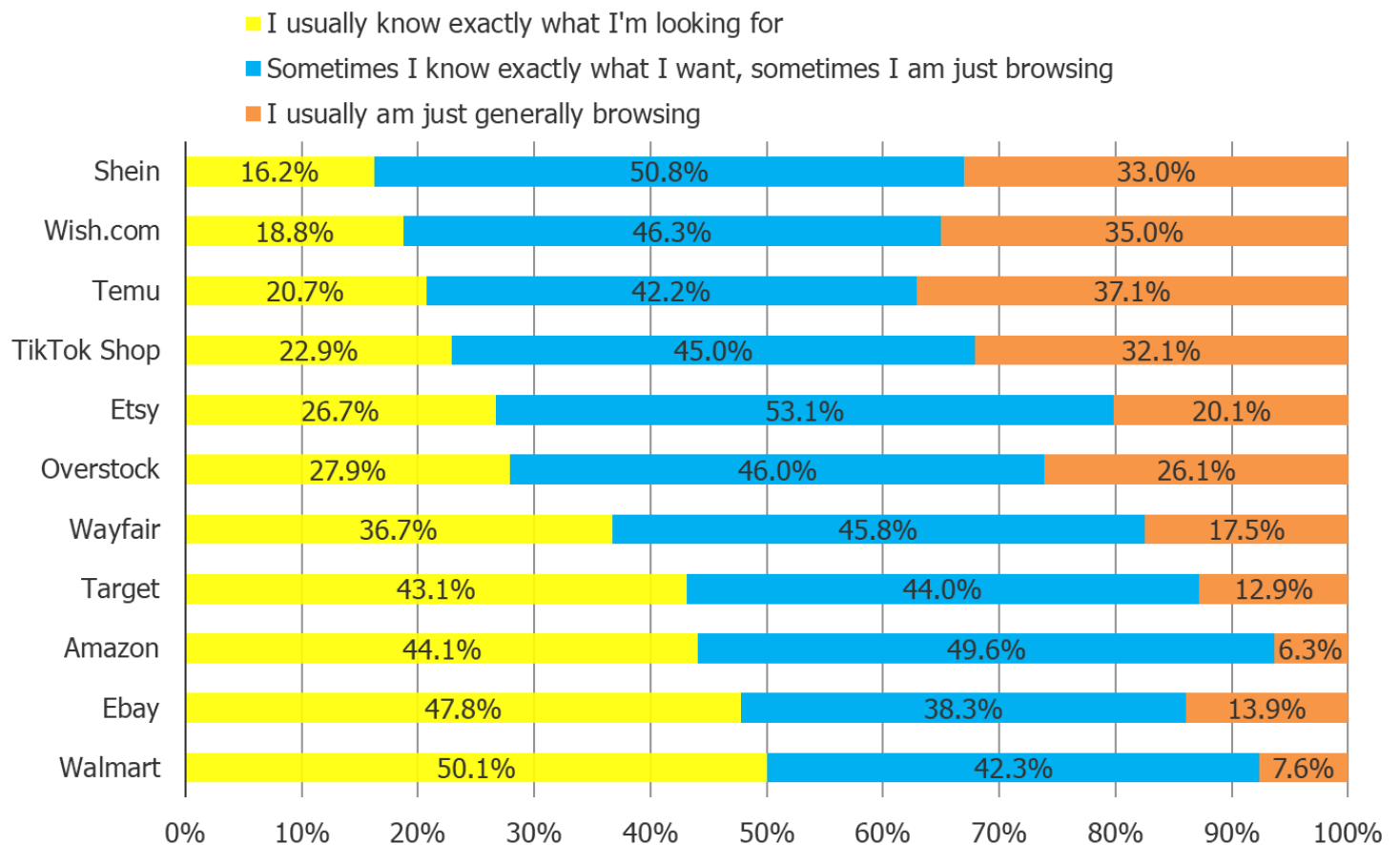
HOW MUCH INTEREST WOULD YOU HAVE IN A PAID LOYALTY PROGRAM WITH WAYFAIR? THE PROGRAM COSTS \$29 PER YEAR AND INCLUDES WAYFAIR, ALLMODERN, BIRCH LANE, JOSS & MAIN, AND PERIGOLD. MEMBERS GET 5% BACK IN REWARDS ON ALL PURCHASES, EARLY ACCESS TO MAJOR SALES EVENTS, AND FREE SHIPPING.

Posed to all Wayfair customers.



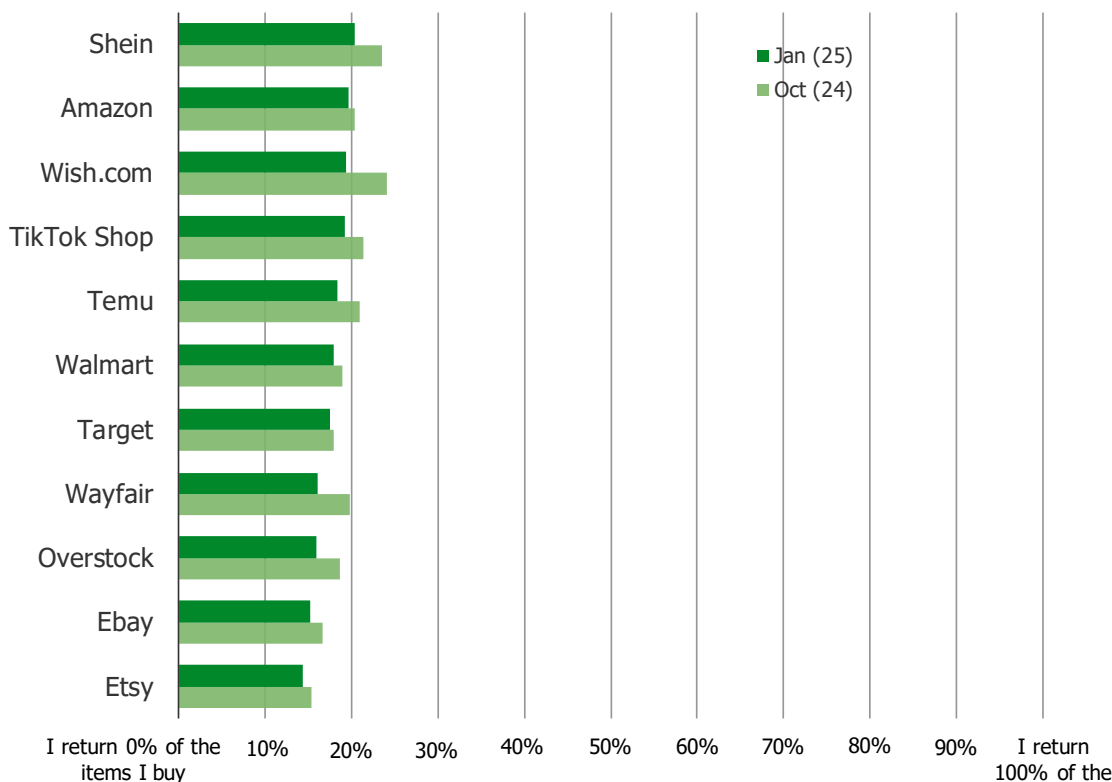
WHEN YOU SEARCH ON THESE PLATFORMS ONLINE, HOW OFTEN DO YOU KNOW EXACTLY WHAT YOU ARE LOOKING FOR VERSUS GENERALLY BROWSING?

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.

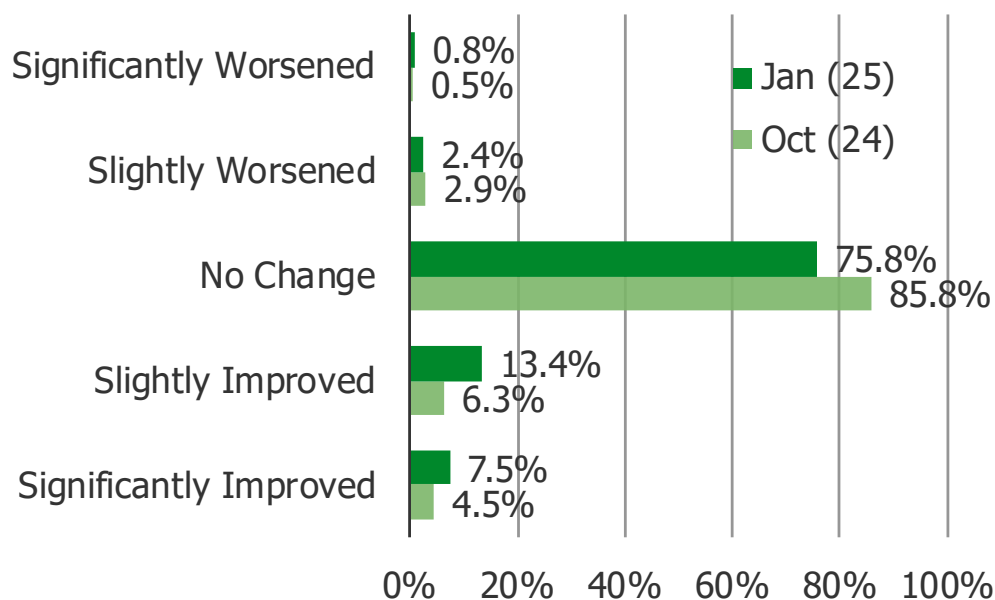


Weighted average above, full breakdown of responses below...

I return X% of the items I buy	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	N=
Amazon	45.1%	37.3%	7.6%	4.6%	2.0%	1.7%	0.7%	0.1%	0.1%	0.3%	0.5%	871
Ebay	76.4%	15.4%	3.0%	0.0%	1.2%	1.7%	0.8%	0.5%	0.3%	0.3%	0.5%	402
TikTok Shop	70.6%	11.0%	6.4%	0.9%	2.8%	1.8%	2.8%	1.8%	0.9%	0.9%	0.0%	109
Etsy	81.6%	12.2%	1.7%	0.4%	0.4%	0.7%	1.4%	0.7%	0.7%	0.0%	0.4%	288
Overstock	76.6%	11.7%	5.4%	0.0%	0.9%	2.7%	0.9%	0.9%	0.9%	0.0%	0.0%	111
Wayfair	68.9%	21.5%	4.5%	0.6%	0.0%	1.7%	1.1%	1.1%	0.6%	0.0%	0.0%	177
Walmart	58.6%	25.8%	8.3%	2.8%	0.7%	1.1%	0.5%	0.8%	0.4%	0.4%	0.5%	747
Target	60.6%	26.8%	5.6%	2.1%	1.4%	1.1%	0.5%	0.9%	0.0%	0.5%	0.5%	568
Wish.com	67.5%	15.0%	7.5%	0.0%	1.3%	2.5%	2.5%	2.5%	0.0%	0.0%	1.3%	80
Temu	69.1%	14.8%	6.3%	1.2%	1.6%	2.7%	0.8%	0.8%	1.6%	0.8%	0.4%	256
Shein	64.0%	14.7%	5.6%	5.6%	2.5%	2.5%	2.0%	1.5%	0.0%	0.0%	1.5%	197

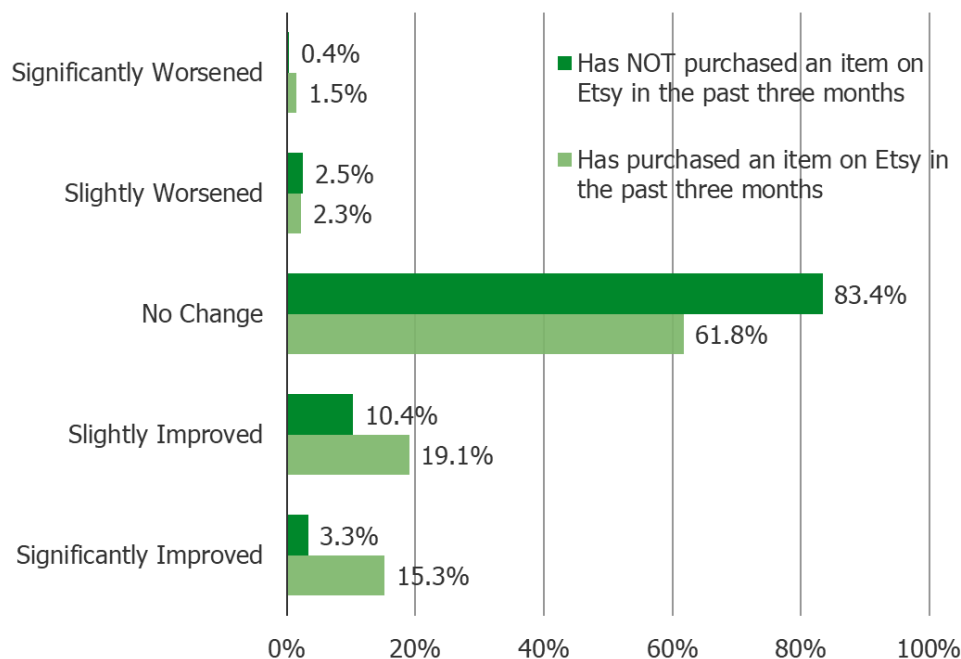
HAVE YOU NOTICED ANY CHANGES RECENTLY TO THE EXPERIENCE OF SEARCHING FOR ITEMS ON THE ETSY SITE OR APP?

Posed to all respondents who ever use or visit Etsy.



JAN 2025

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

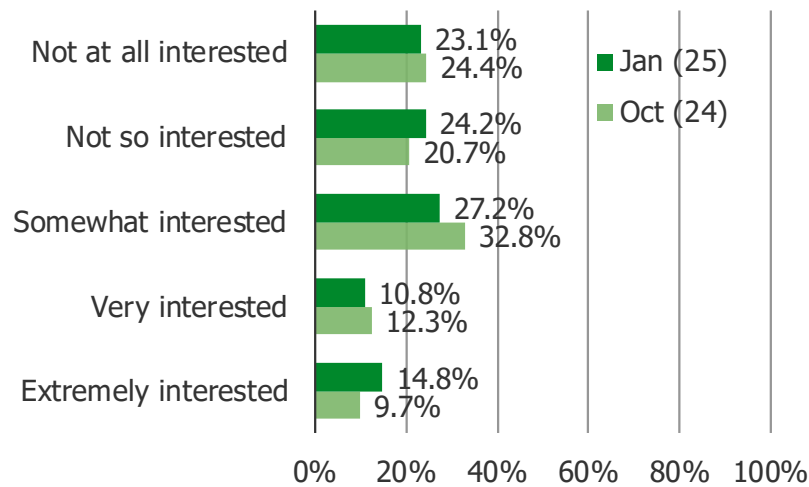


HOW MUCH INTEREST WOULD YOU HAVE IN JOINING AN ETSY INSIDER MEMBERSHIP PROGRAM?

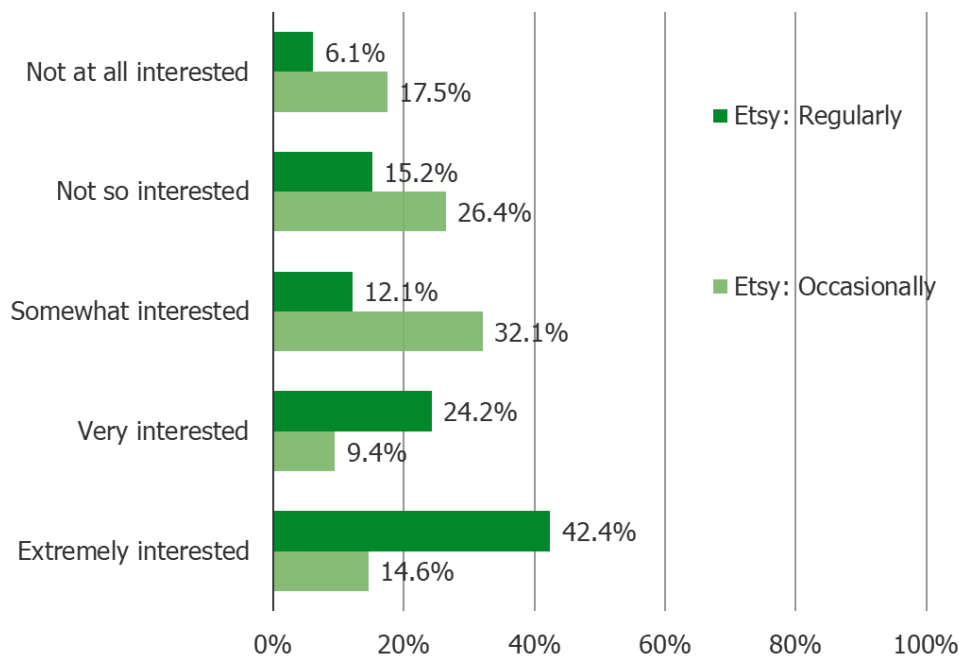
BENEFITS OF THIS PROGRAM MIGHT INCLUDE:

- 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.



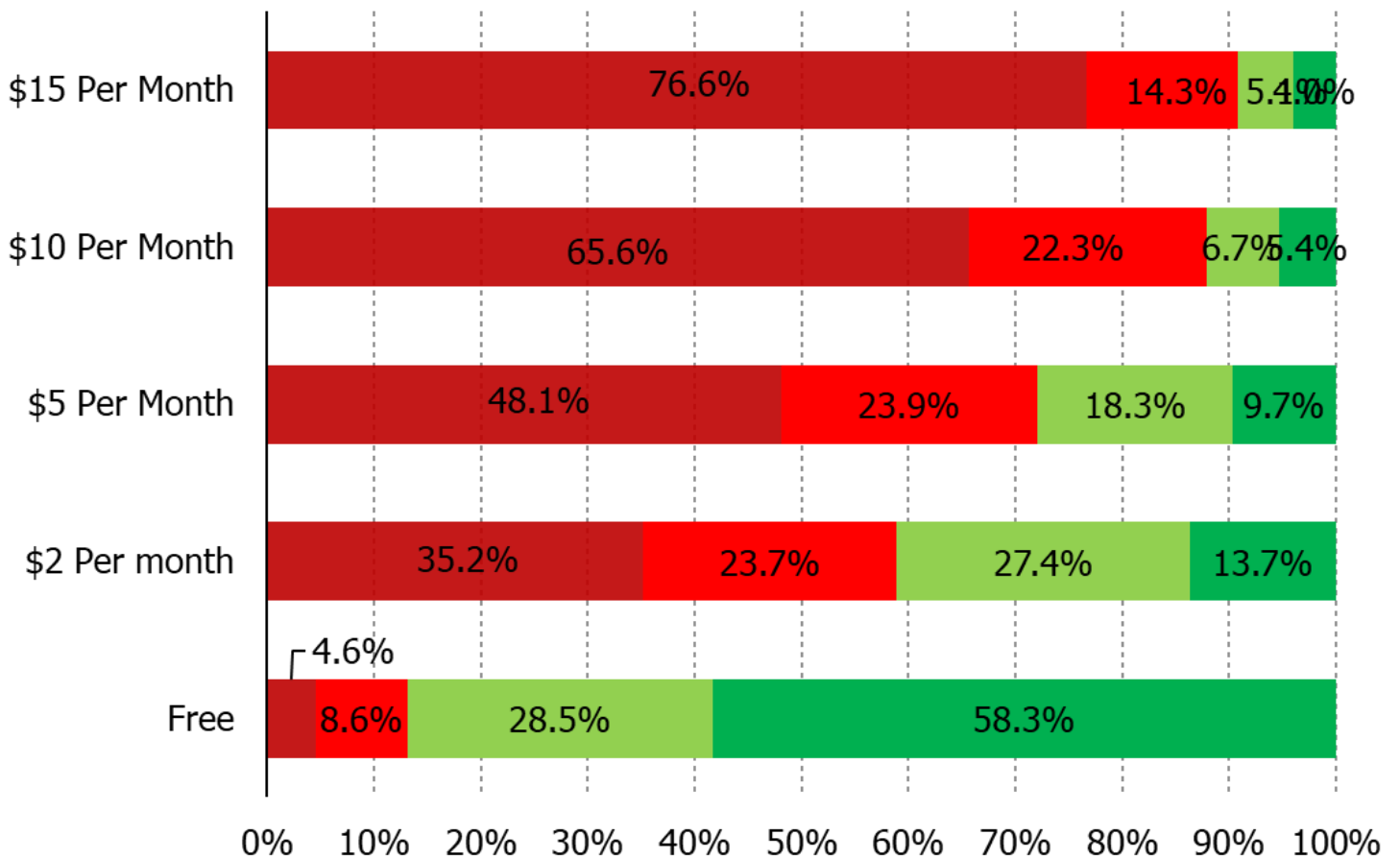
JAN 2025 - Cross tabbing the data above...



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

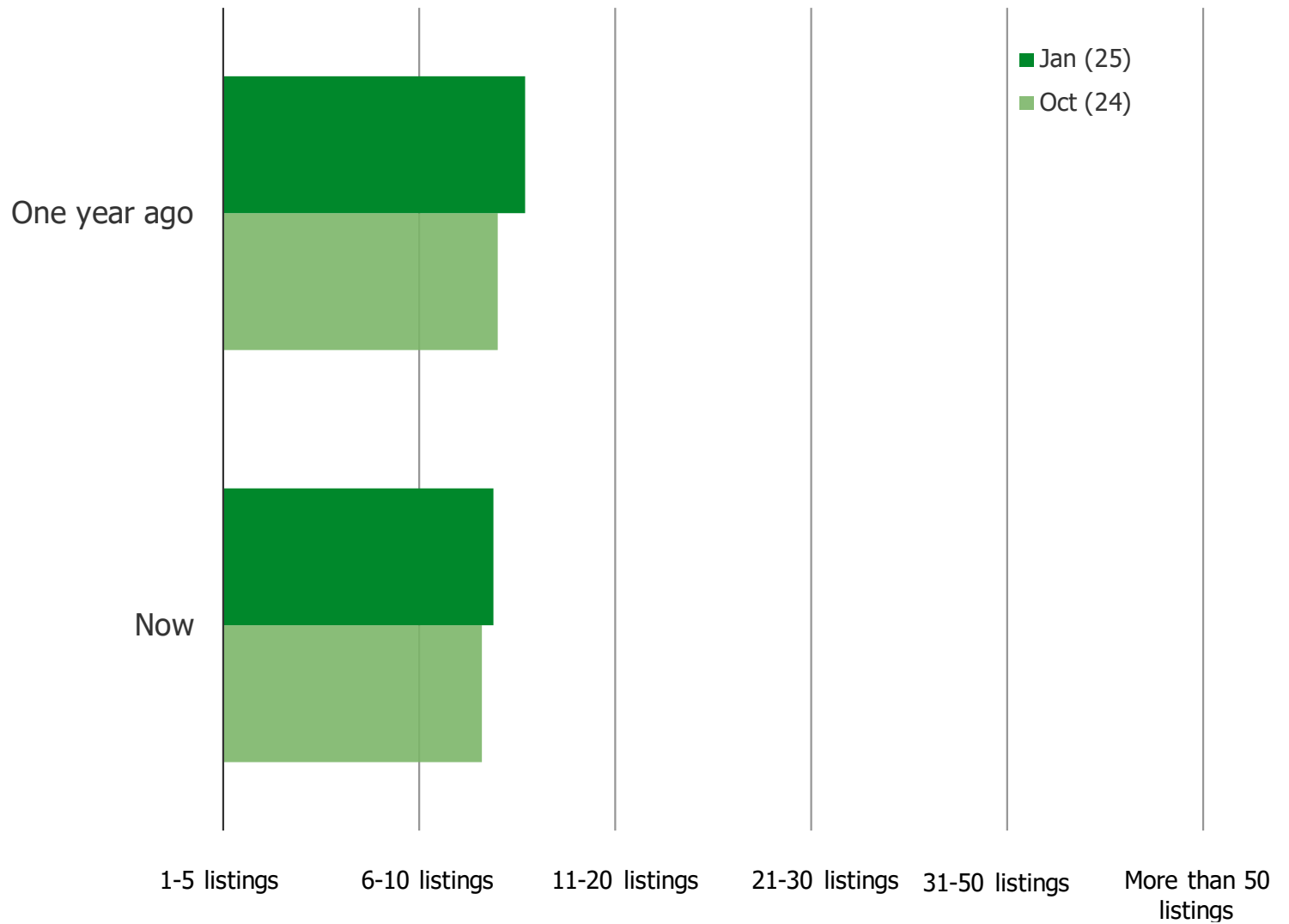
Posed to all respondents who ever use or visit Etsy.

■ Definitely WOULD NOT ■ Probably WOULD NOT ■ Probably WOULD ■ Definitely WOULD



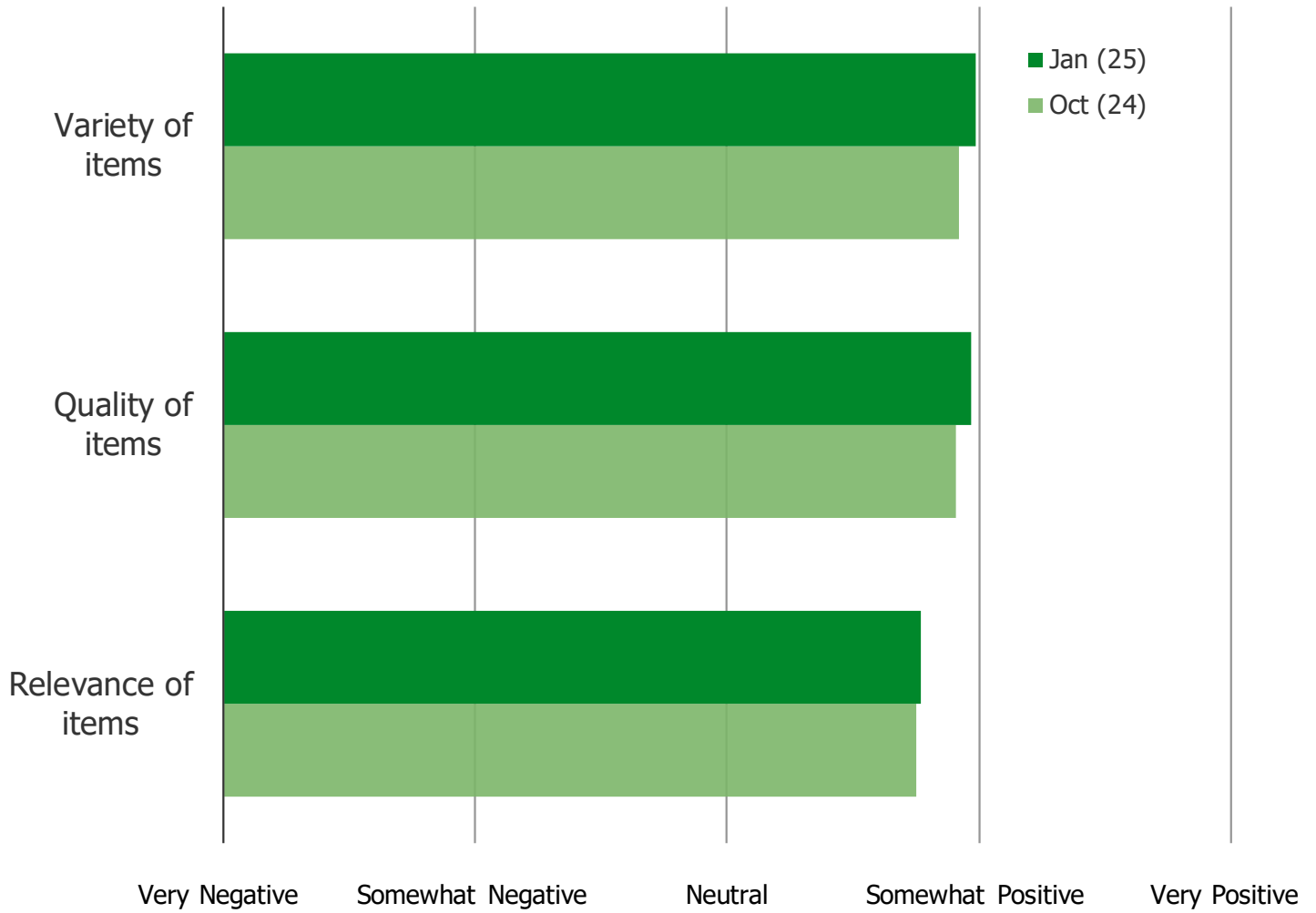
HOW MANY LISTINGS WOULD YOU ESTIMATE YOU NEED TO LOOK THROUGH WHEN YOU SEARCH FOR ITEMS ON ETSY BEFORE YOU FIND WHAT YOU WERE LOOKING FOR?

Posed to all respondents who ever use or visit Etsy.



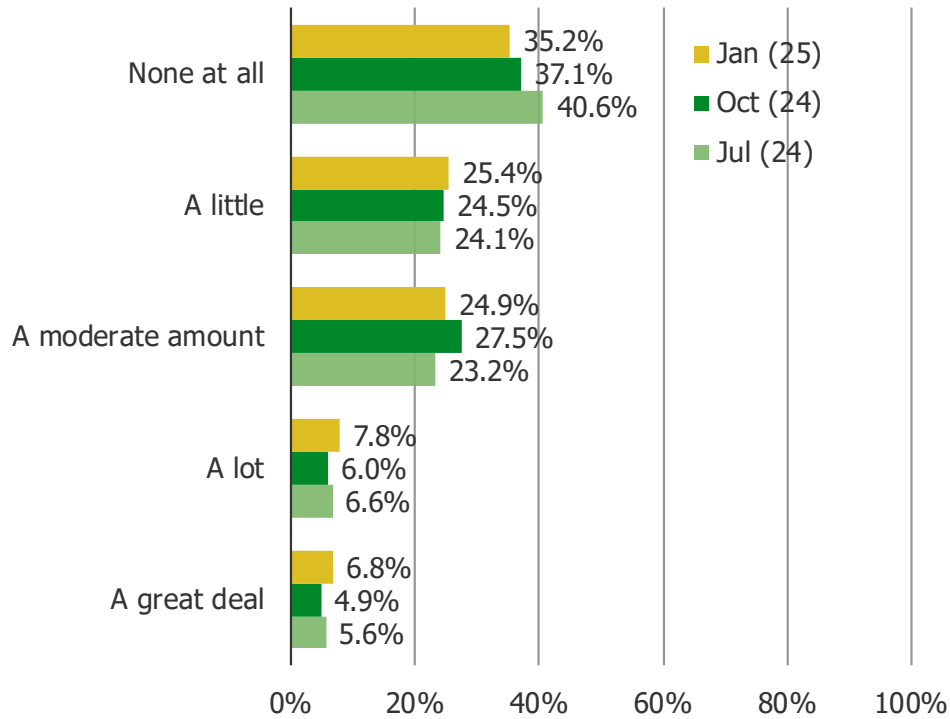
WHAT IS YOUR OPINION OF THE FOLLOWING WHEN SEARCHING FOR ITEMS ON ETSY?

Posed to all respondents who ever use or visit Etsy.

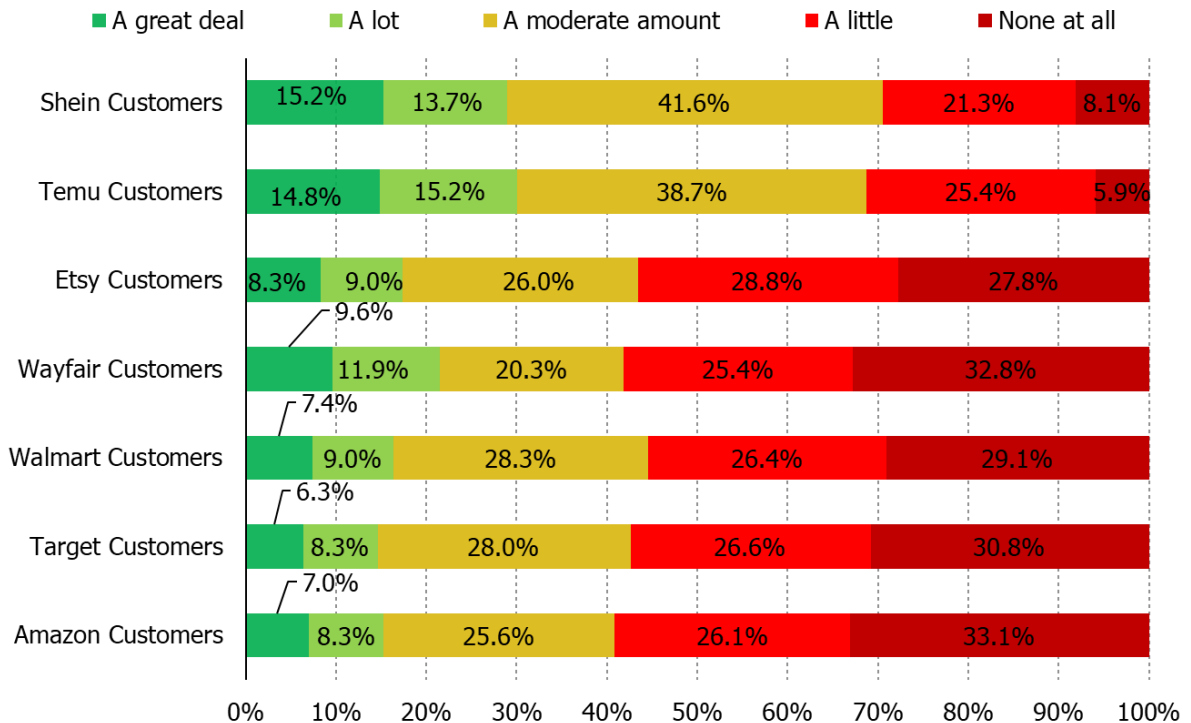


HOW MUCH USE DO YOU HAVE IN GENERAL FOR WEBSITES OR APPS THAT SELL CHEAP GOODS AND SHIP FROM WAREHOUSES IN CHINA DIRECTLY TO YOU IN THE US?

Posed to all respondents

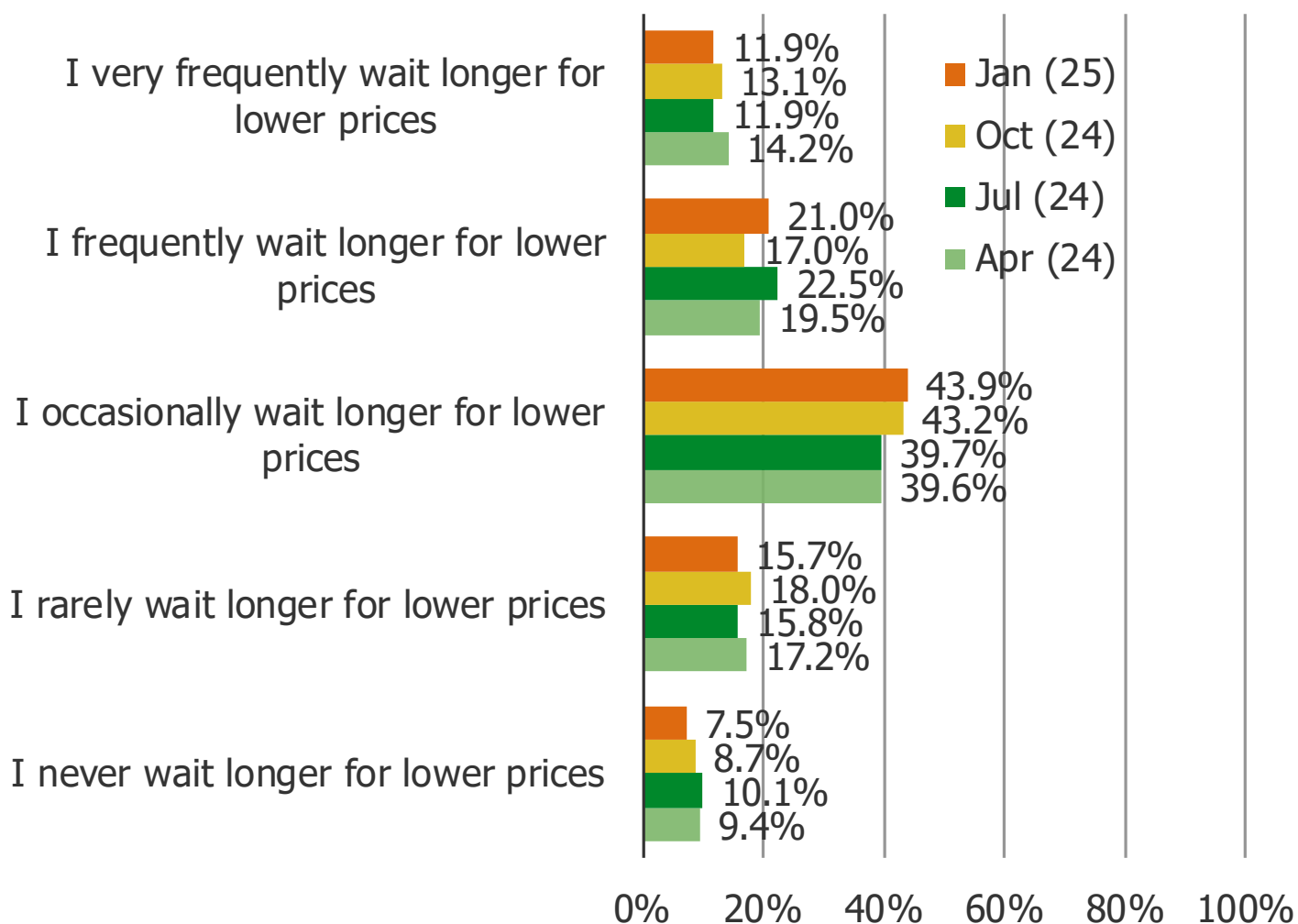


Cross-tabbing the above chart...



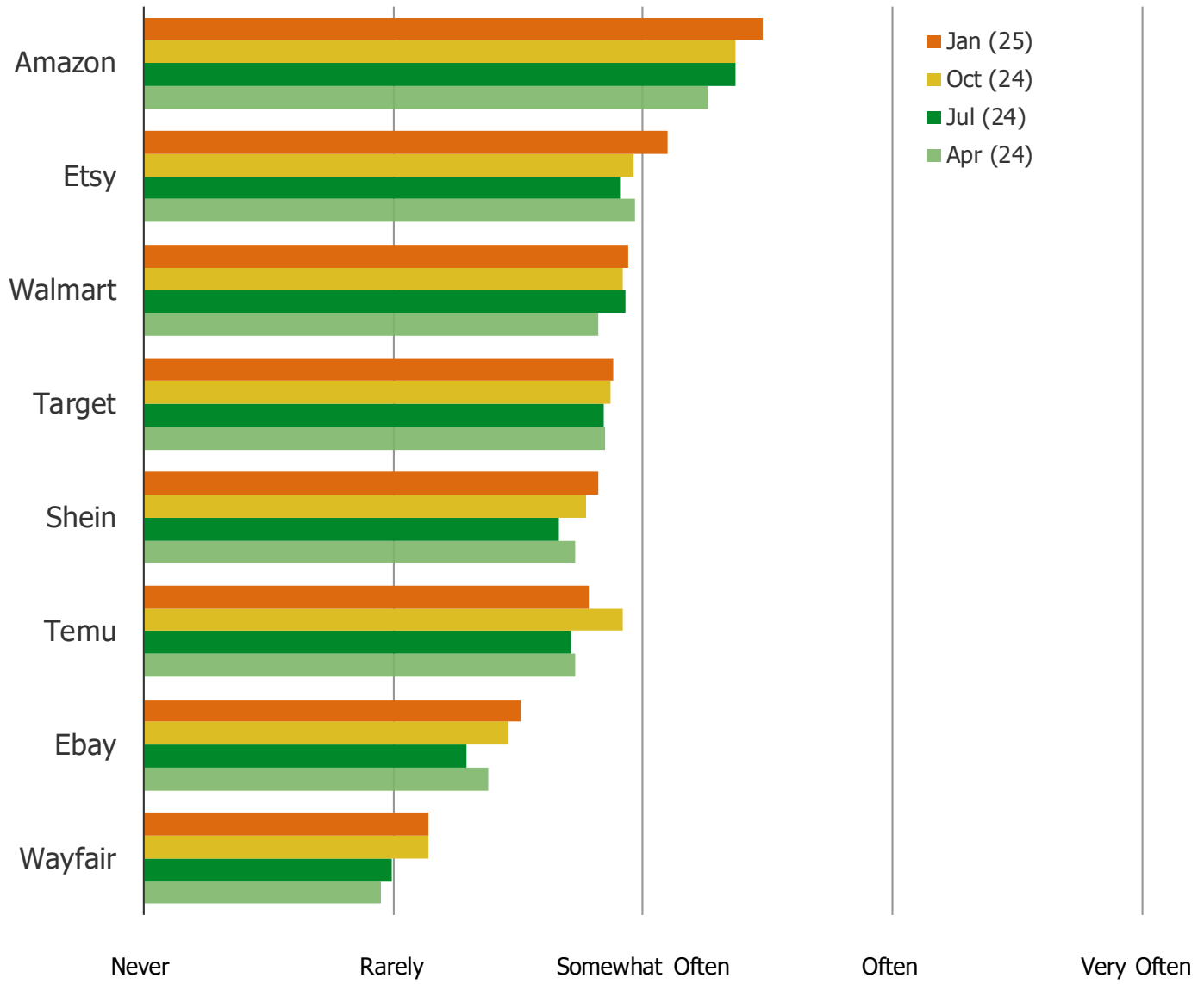
WHEN YOU SHOP ONLINE, HOW DO YOU THINK ABOUT THE TRADEOFF BETWEEN PRICE AND DELIVERY SPEED?

Posed to all respondents.



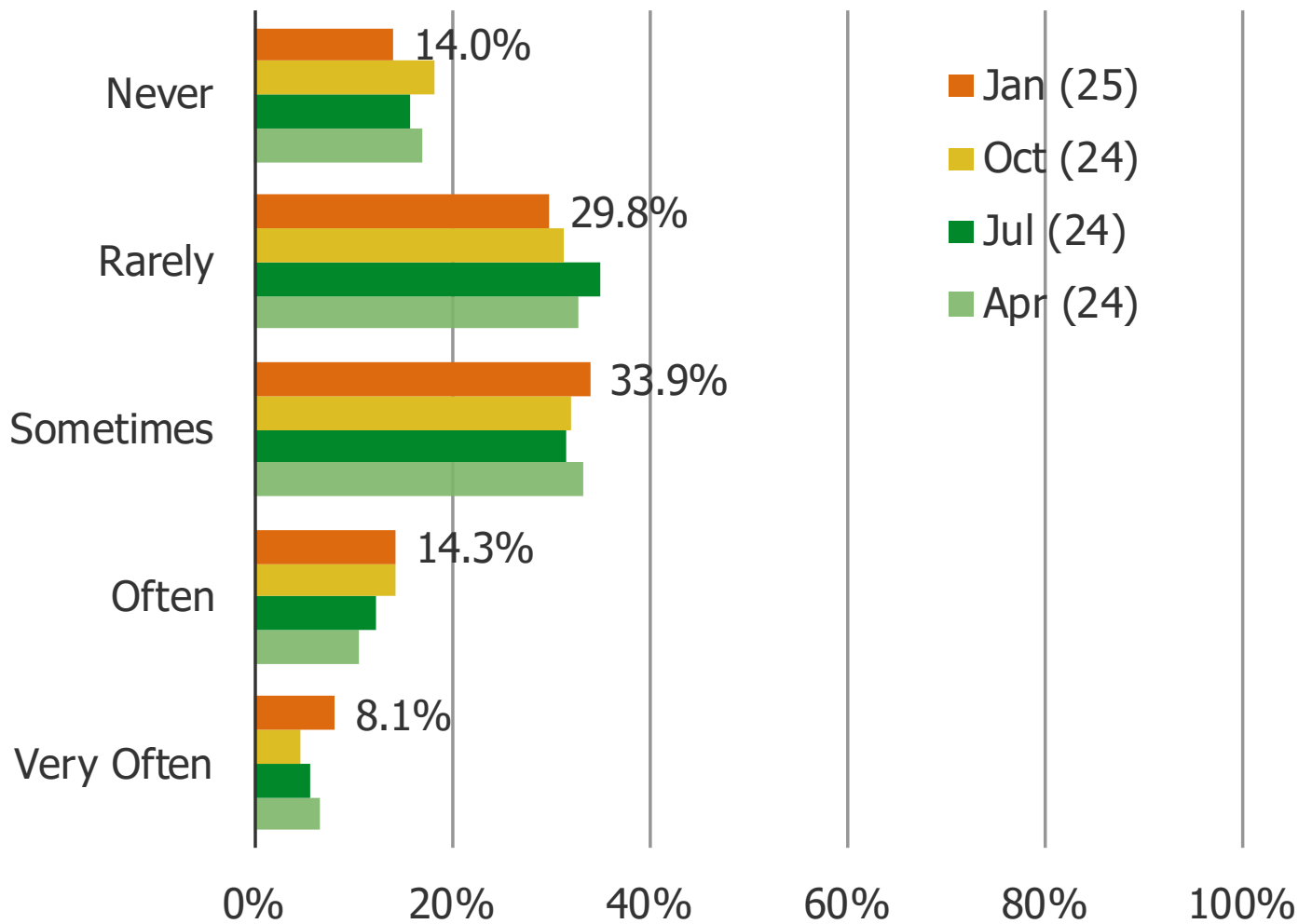
HOW OFTEN DO YOU BUY GIFTS FOR OTHERS THROUGH THIS PLATFORM?

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



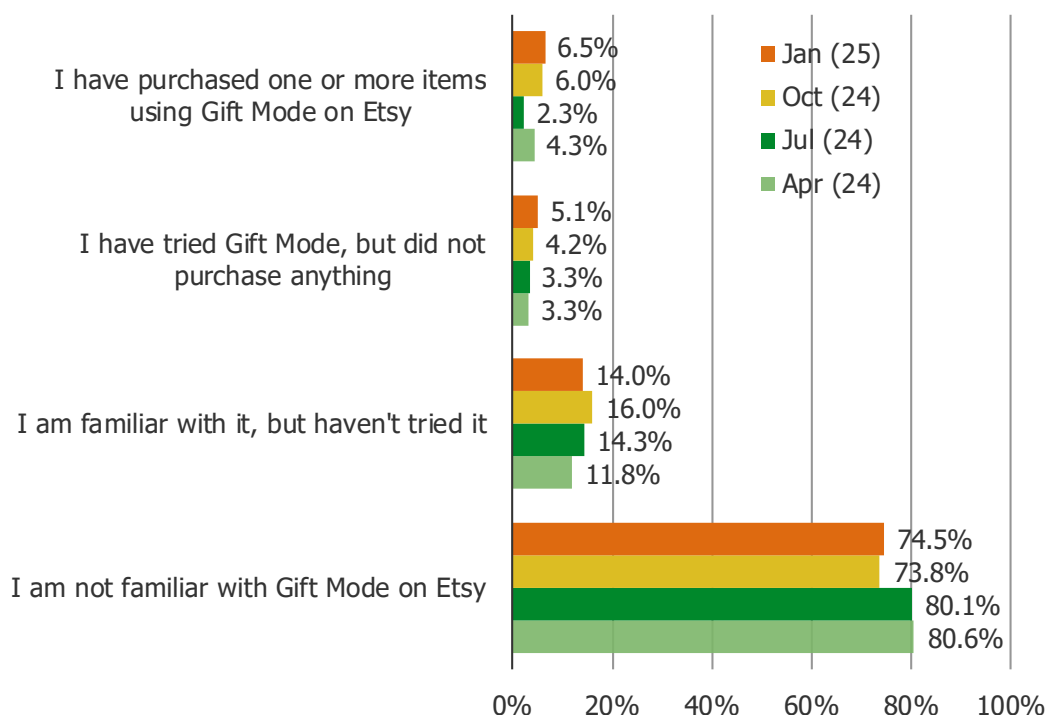
HOW OFTEN DO YOU USE ETSY TO BUY GIFTS FOR OTHERS?

Posed to all respondents who have shopped Etsy.

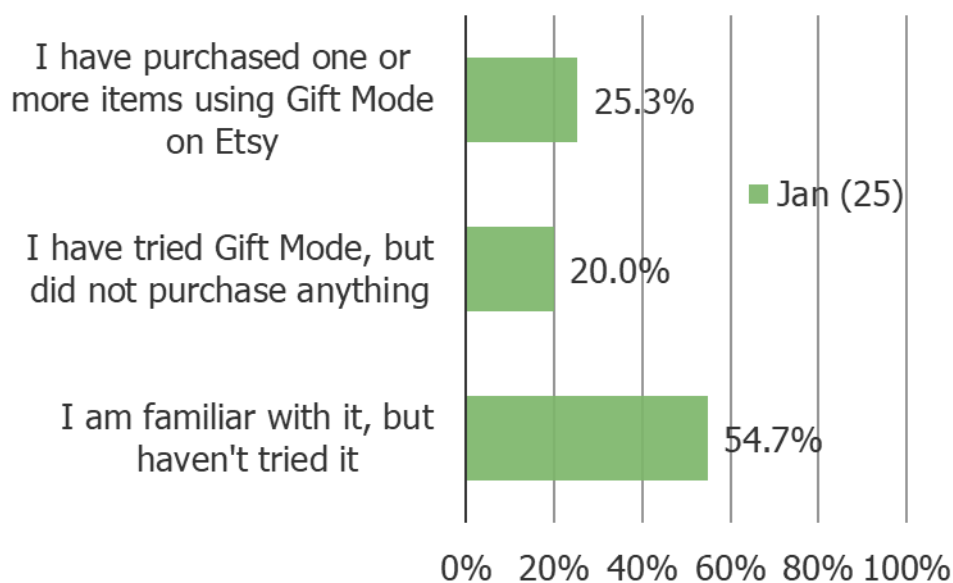


HAVE YOU TRIED GIFT MODE ON ETSY?

Posed to all respondents who have shopped Etsy.

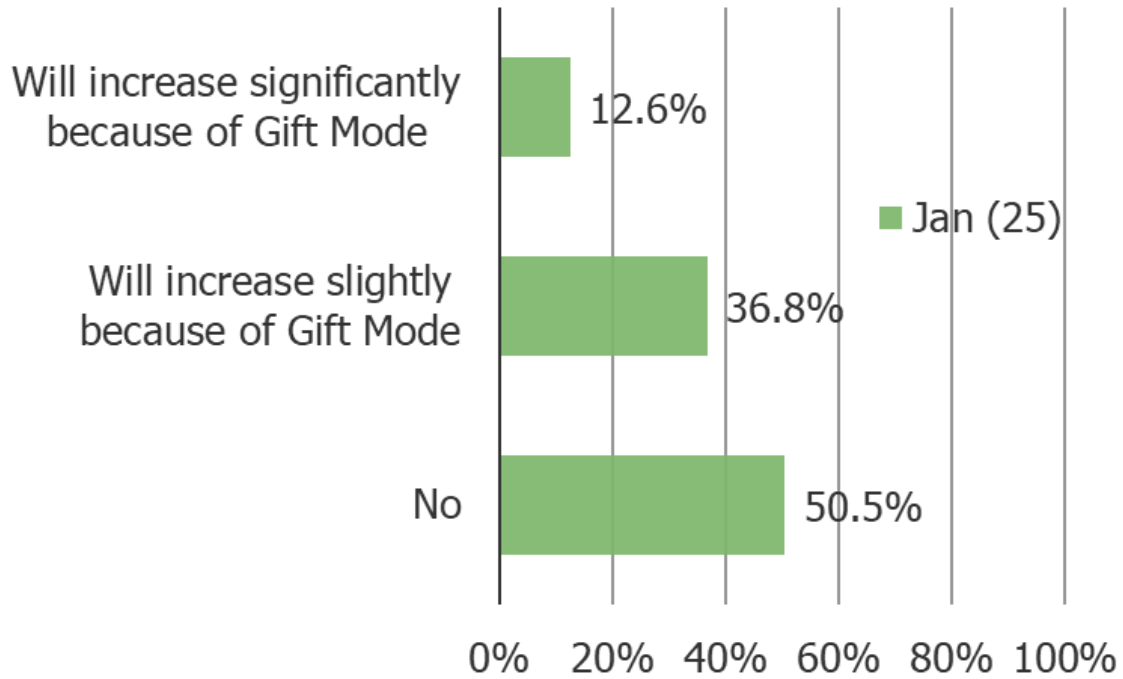


Posed to all respondents who have shopped Etsy (factoring out people who aren't aware of Gift Mode on Etsy).



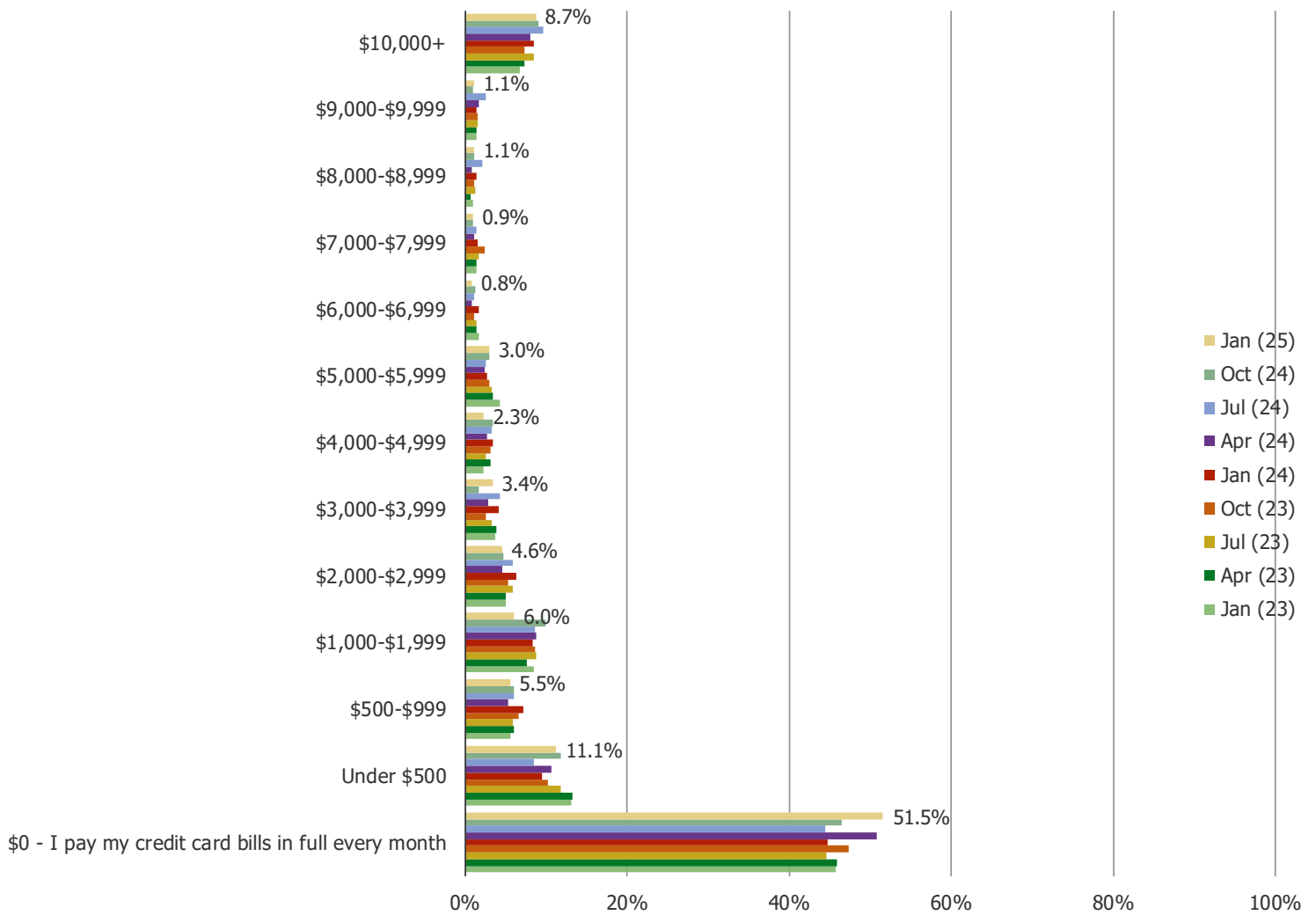
DO YOU THINK YOU WILL INCREASE THE SHARE OF YOUR GIFT GIVING THAT YOU BUY THROUGH ETSY BECAUSE OF THE GIFT MODE FEATURE?

Posed to all respondents who are at least familiar with Gift Mode on Etsy.



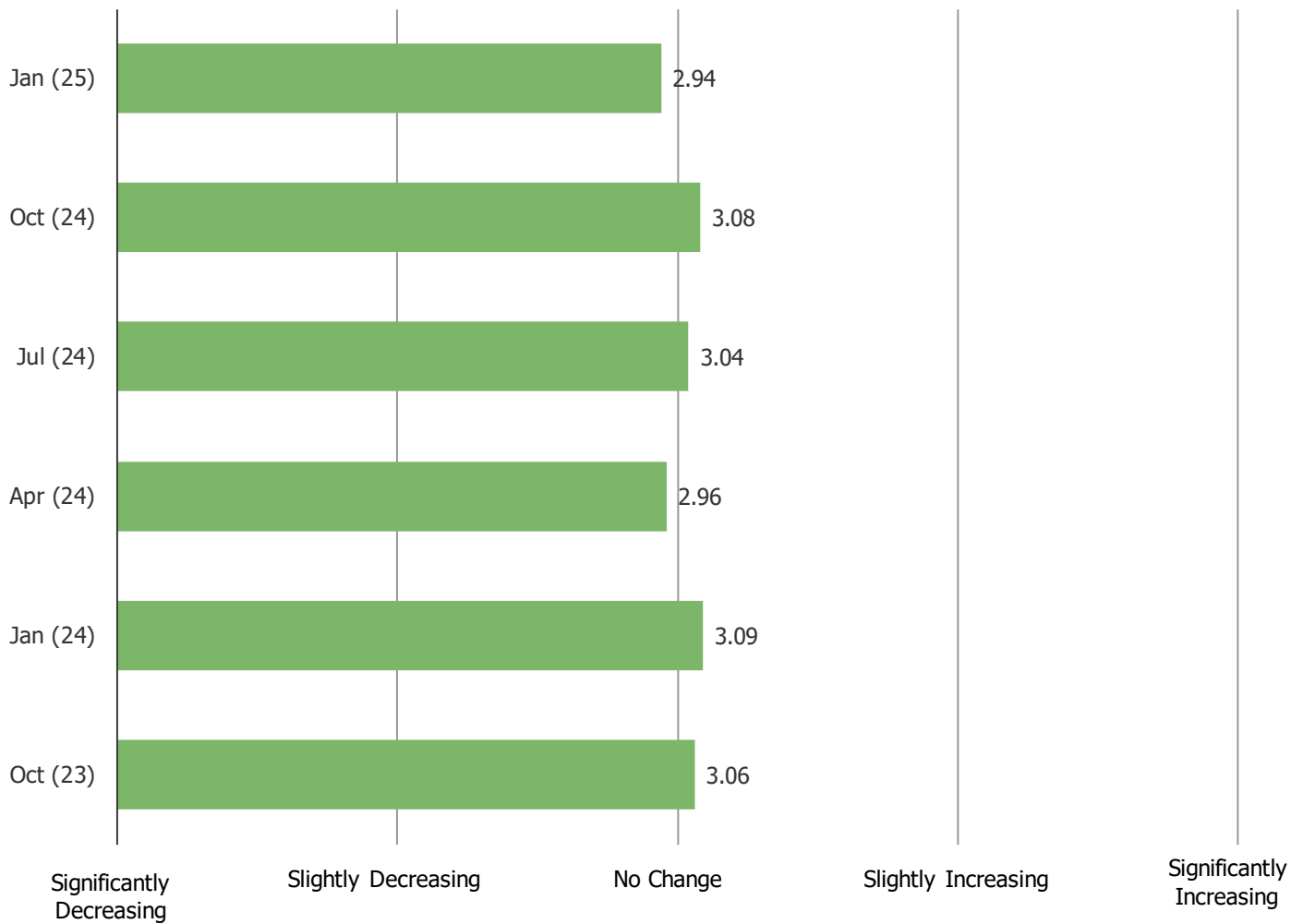
HOW MUCH CREDIT CARD DEBT DO YOU HAVE? IE – HOW MUCH OF AN OUTSTANDING BALANCE DO YOU CARRY OVER FROM MONTH TO MONTH?

Posed to all respondents.



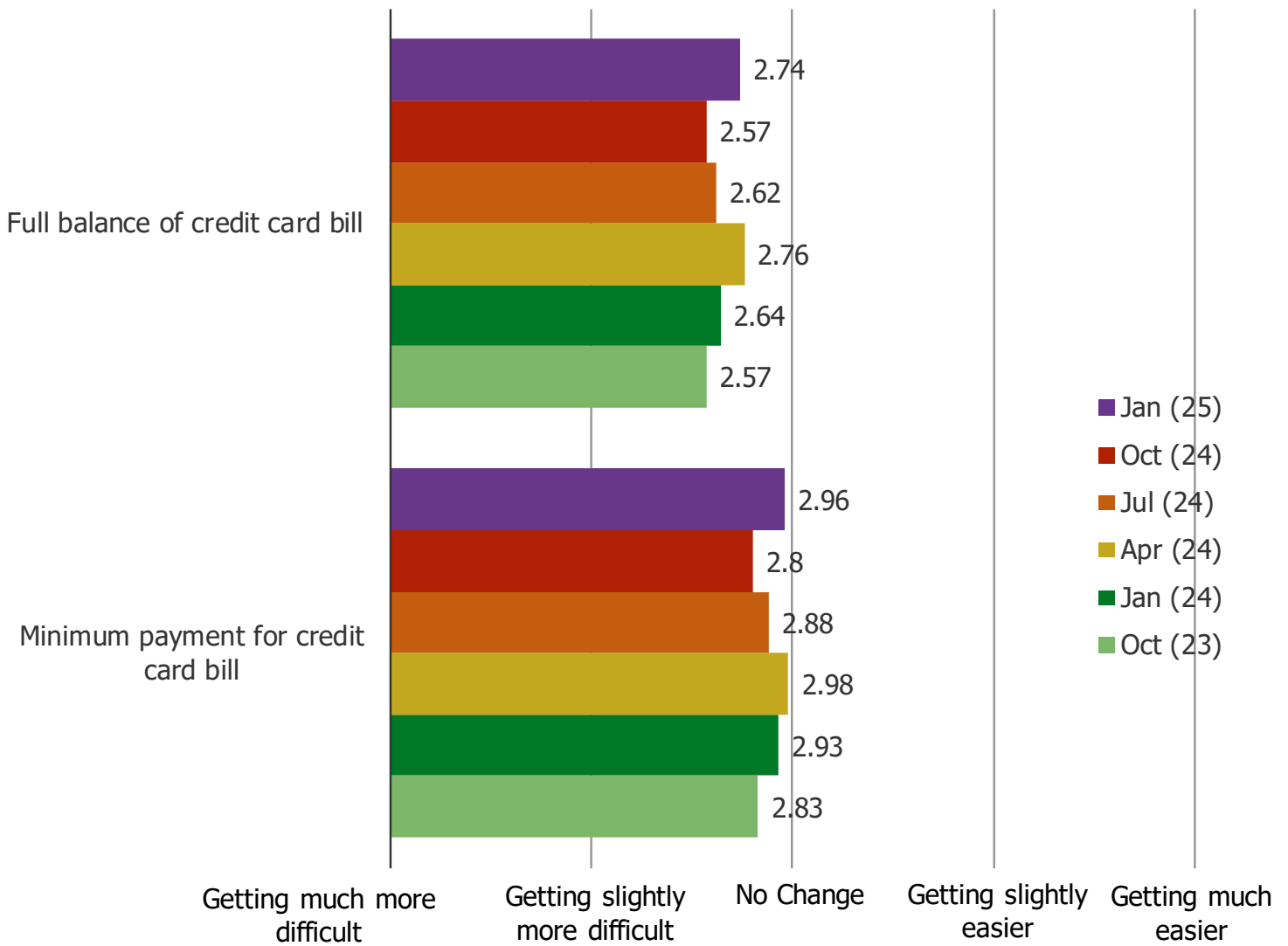
HAS THE AMOUNT OF CREDIT CARD DEBT THAT YOU HAVE BEEN INCREASING OR DECREASING OVER THE PAST 12 MONTHS?

Posed to all respondents.



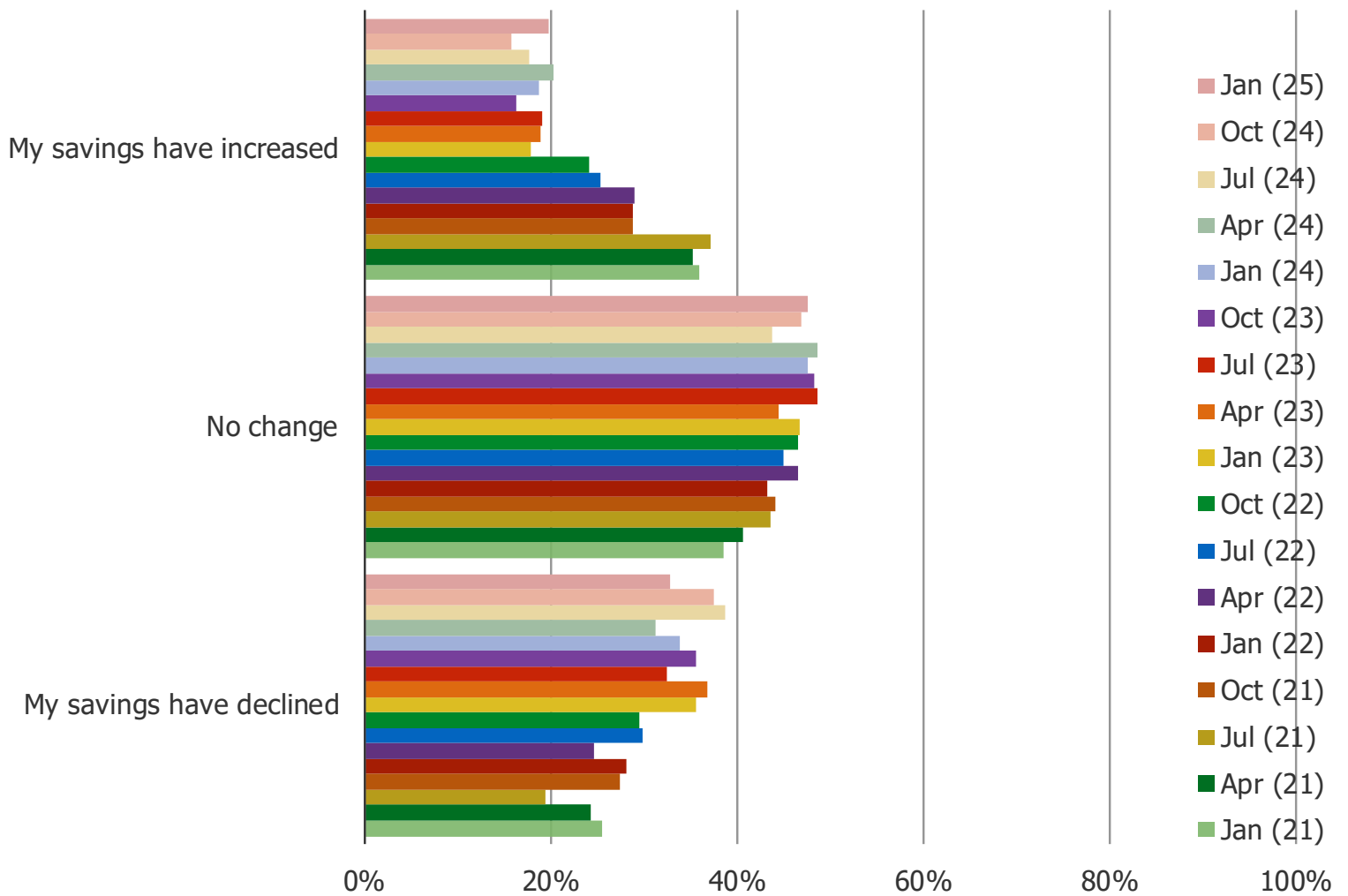
IS IT GETTING EASIER OR MORE DIFFICULT TO PAY THE FOLLOWING EACH MONTH...

Posed to all respondents.



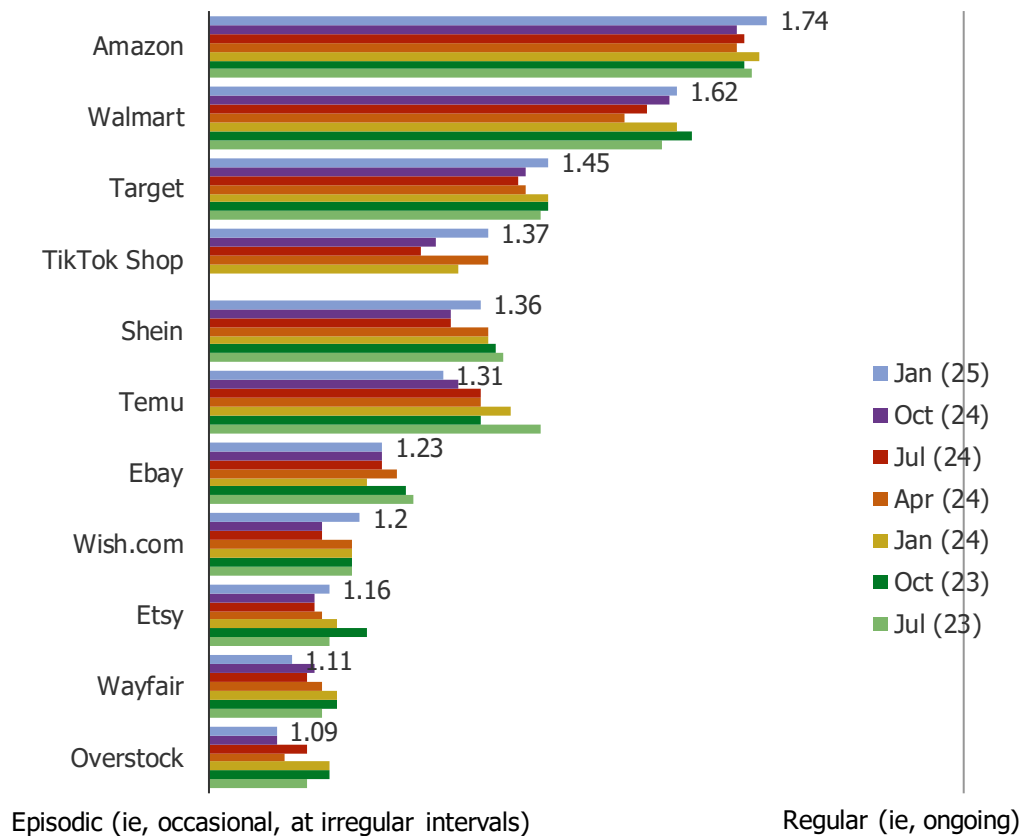
TO THE BEST OF YOUR ESTIMATION, DID THE AMOUNT OF MONEY YOU HAVE SAVED CHANGE SINCE THE START OF THE COVID-19 PANDEMIC?

Posed to all respondents.

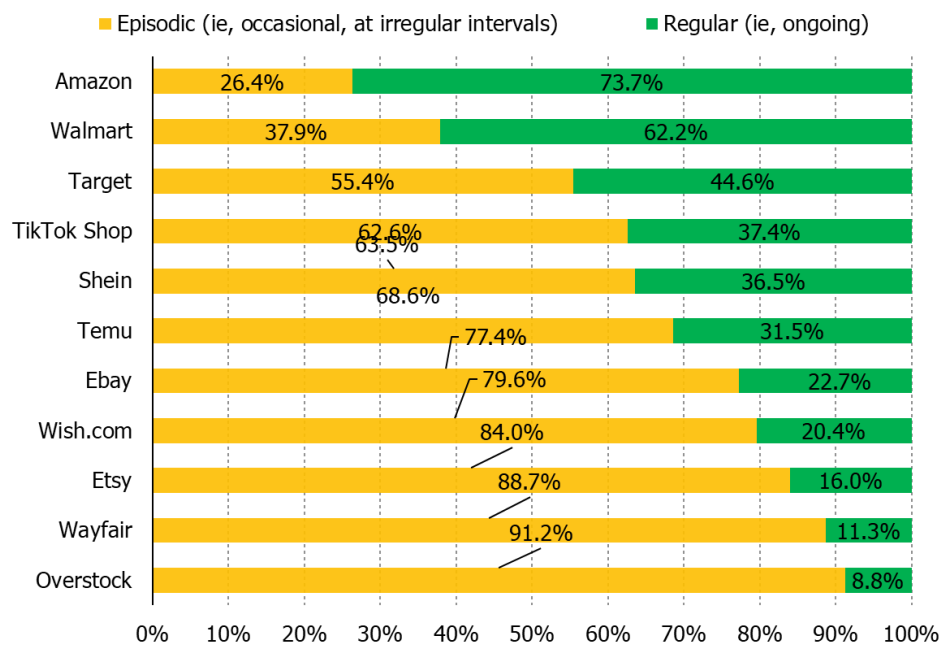


WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.



January 2025 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?

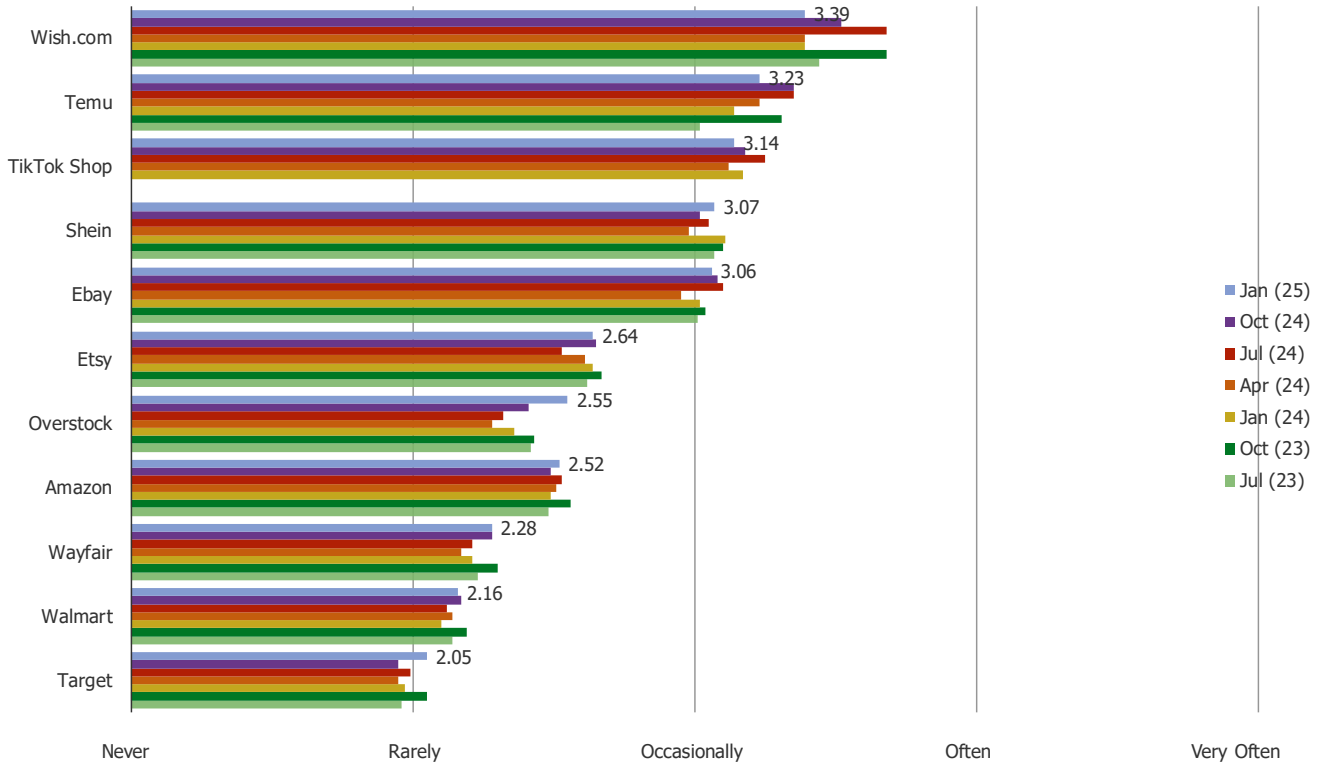
Posed to all respondents who shop the below and their use is more episodic than regular.

eBay

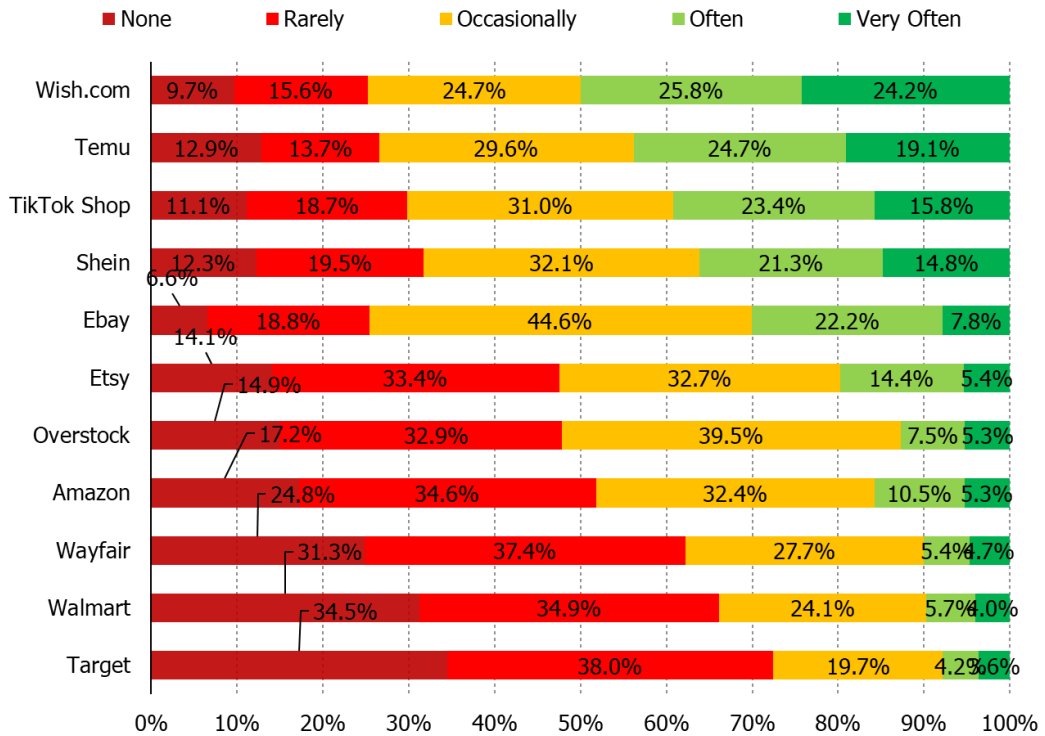


HOW OFTEN DO YOU THINK THERE ARE COUNTERFEIT / FAKE ITEMS BEING SOLD ON THIS PLATFORM?

Posed to all respondents who shop the below.

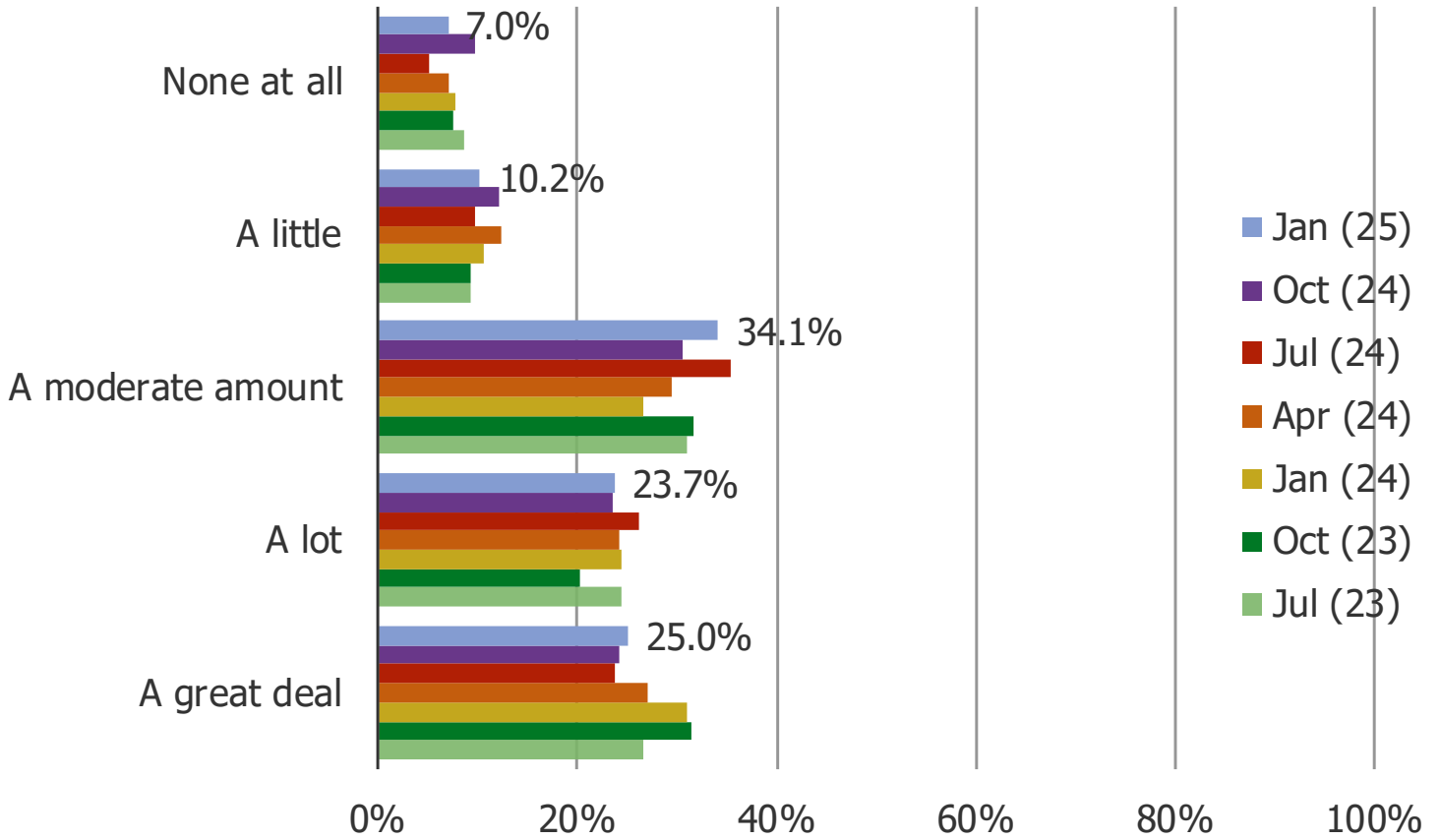


January 2025 Breakout



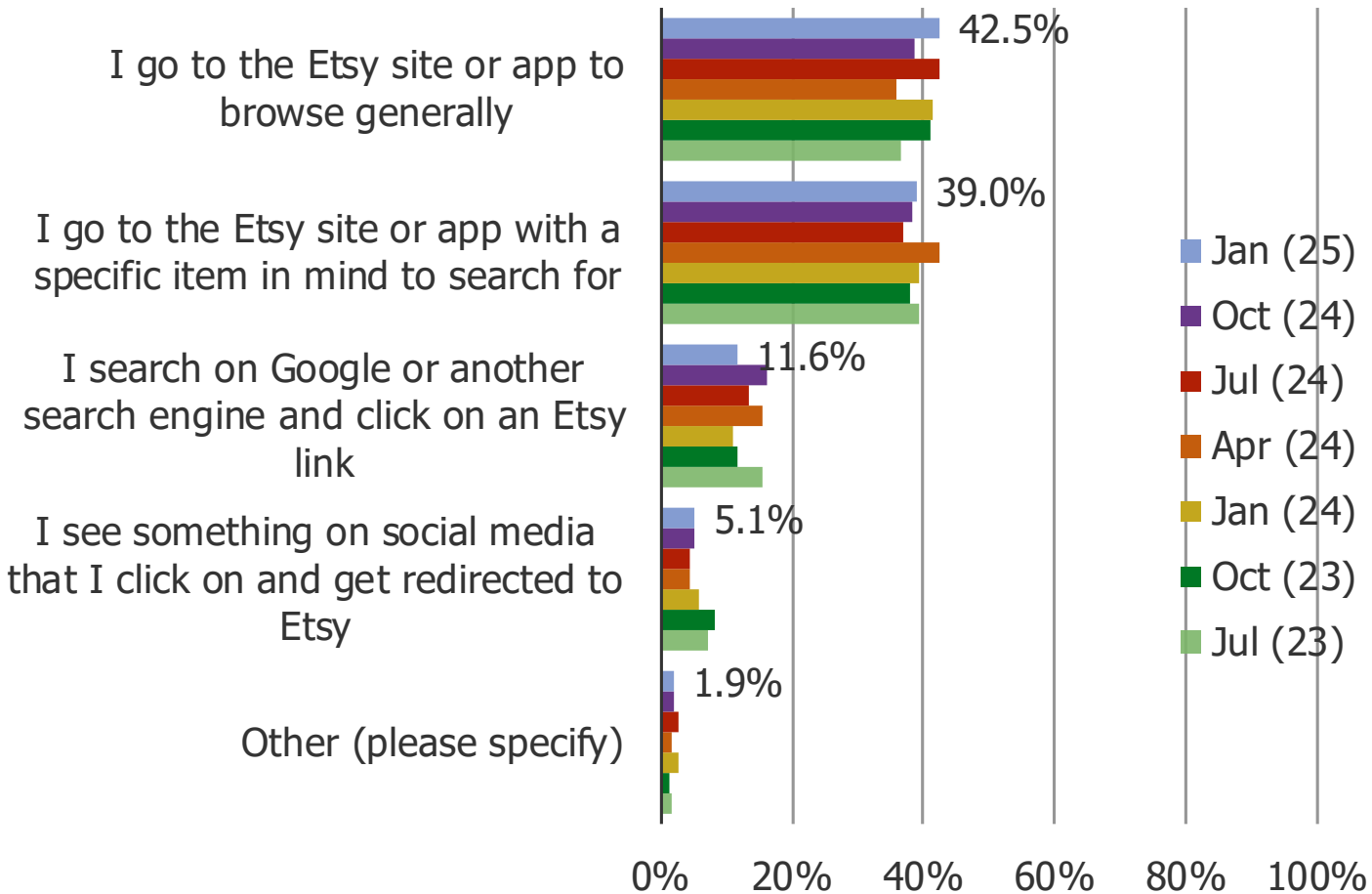
WHEN YOU SHOP ETSY, HOW MUCH DOES IT MATTER TO YOU THAT YOU ARE SUPPORTING SMALL BUSINESSES AND MAKING A POSITIVE IMPACT WITH YOUR PURCHASES?

Posed to all respondents who shop Etsy.



HOW DO YOU MOST COMMONLY FIND YOURSELF SHOPPING ON ETSY?

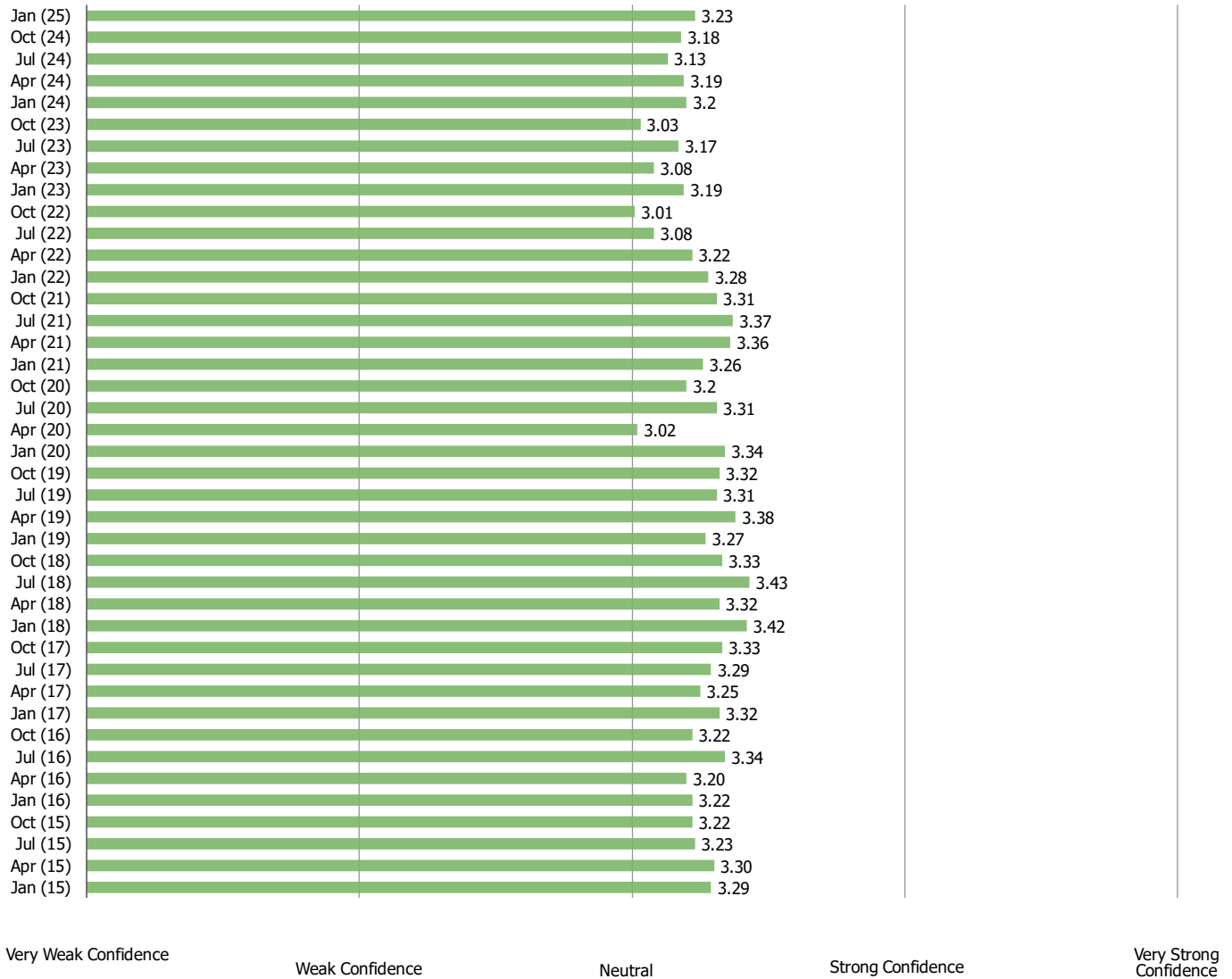
Posed to all respondents who shop Etsy.



OVERALL SHOPPING TRENDS

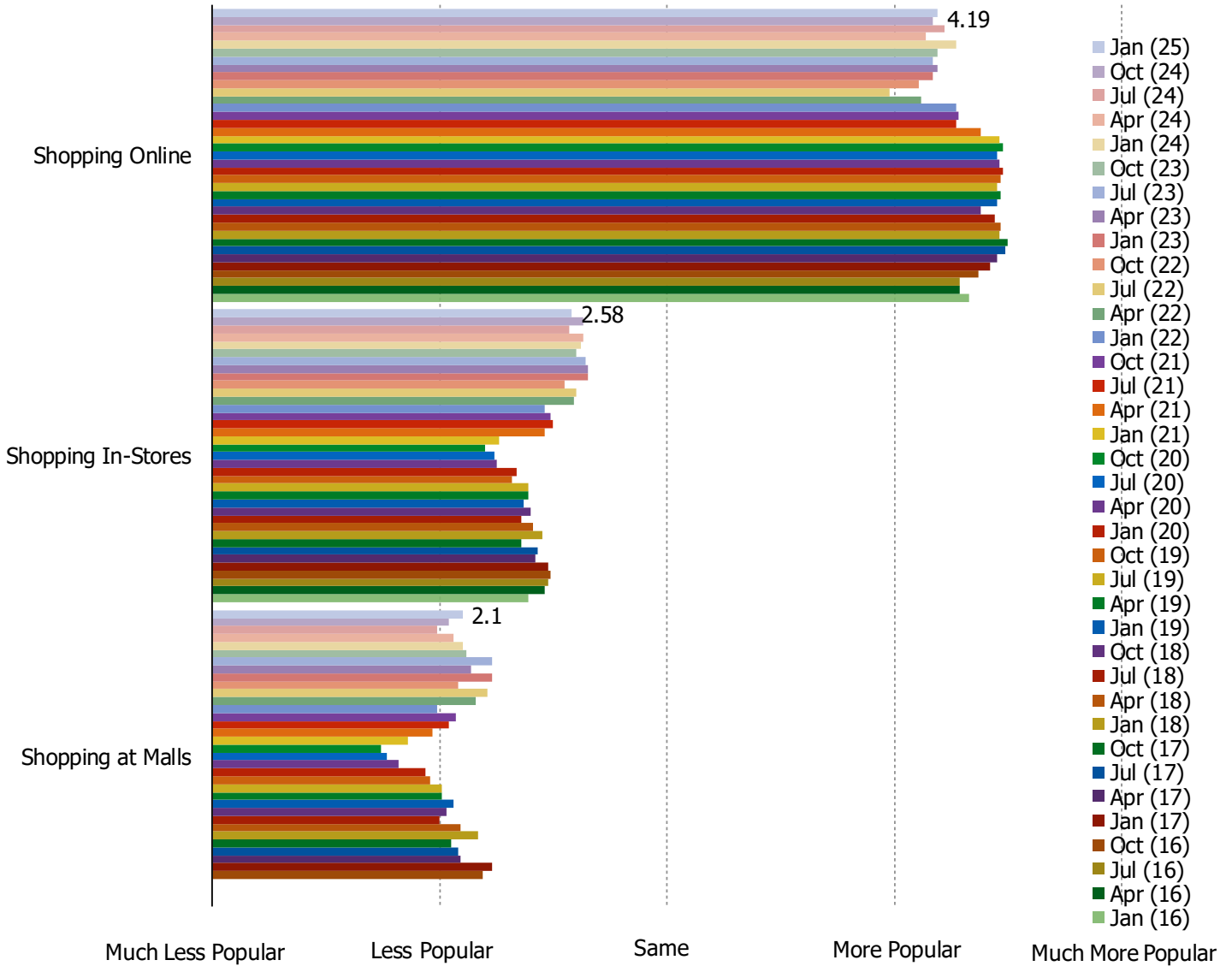
HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



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

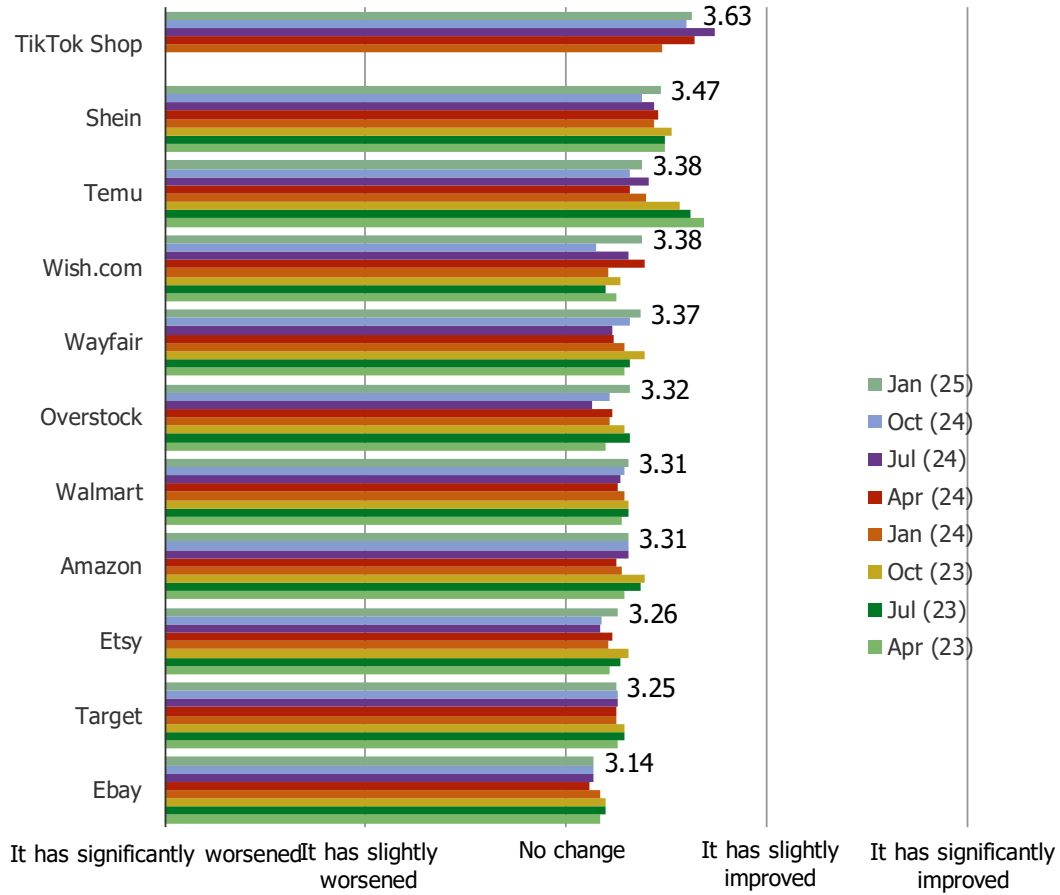
Posed to all respondents



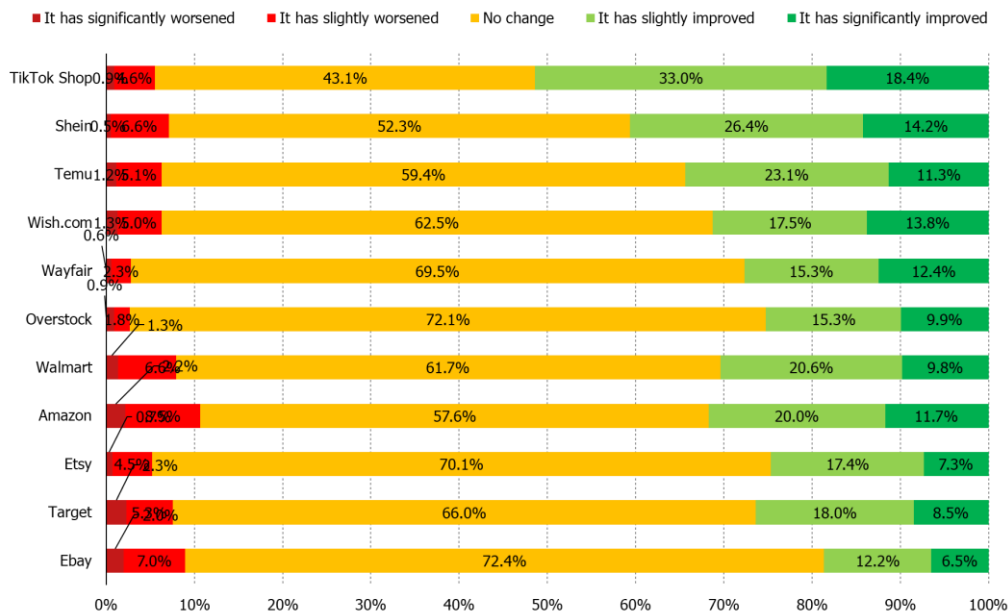
SALES AND TRUST

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:

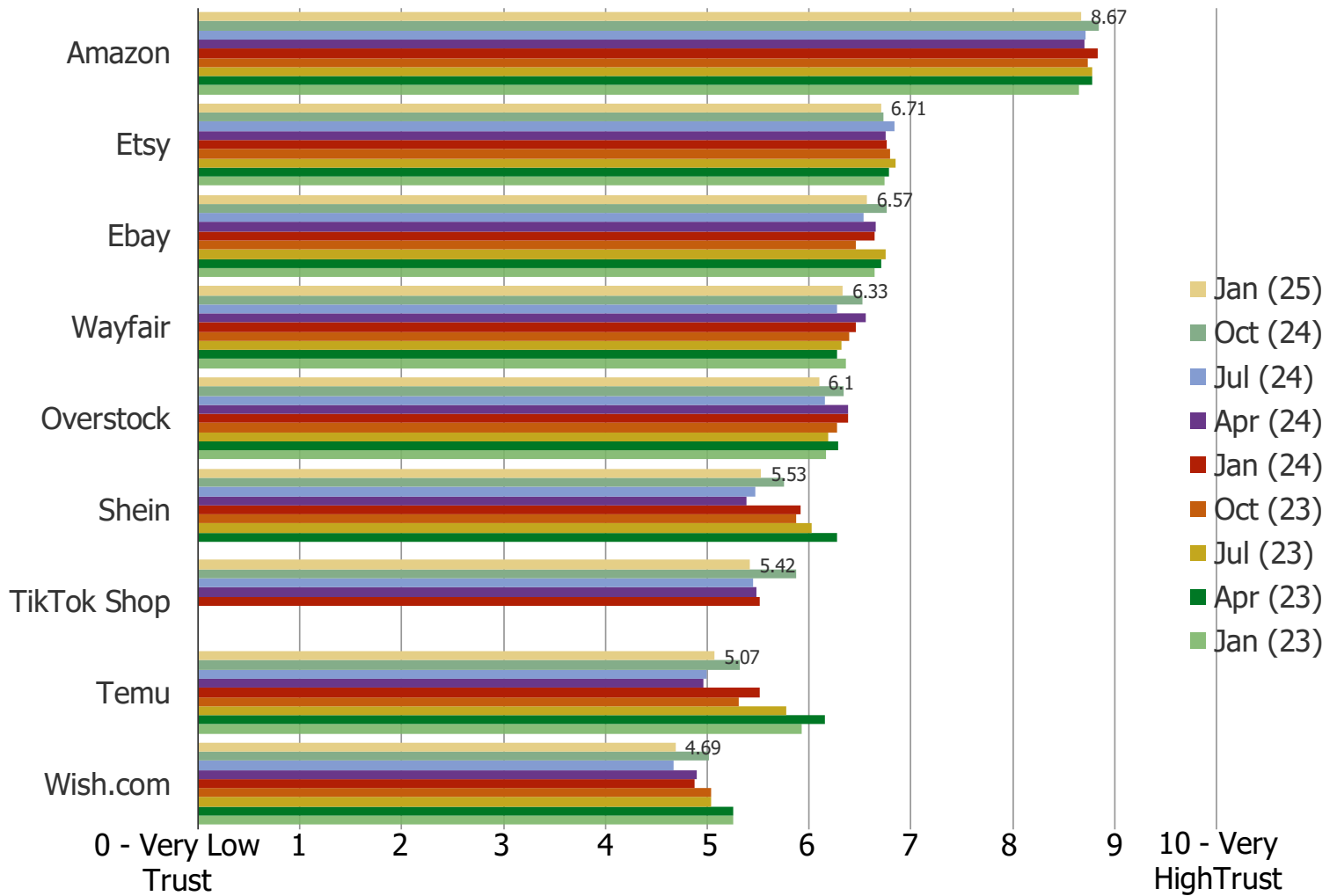


January 2025 Breakout



HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

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

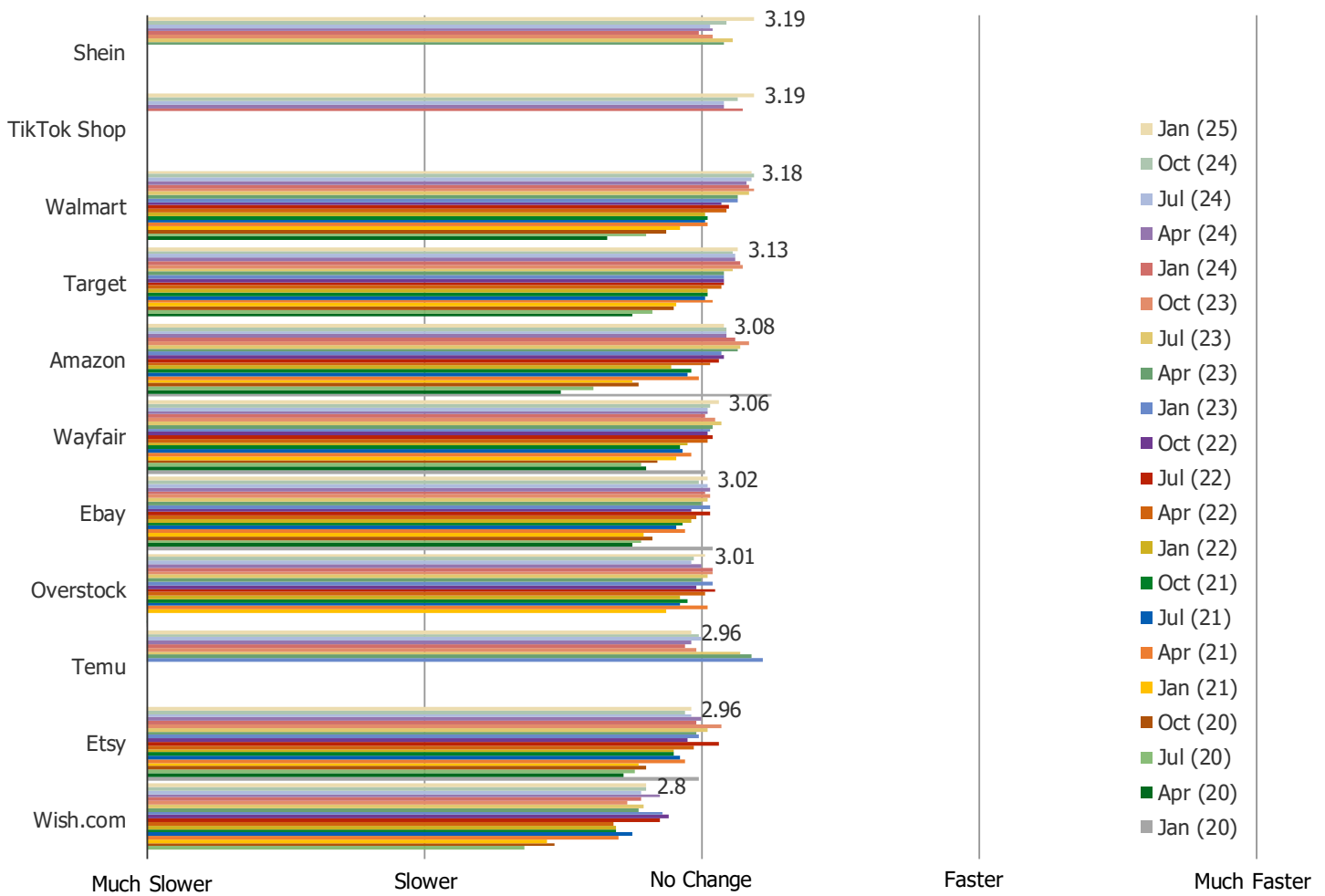


	N=
Etsy	803
Amazon	956
Ebay	870
TikTok Shop	435
Overstock	666
Wayfair	781
Wish.com	497
Temu	807
Shein	616

SHIPPING

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

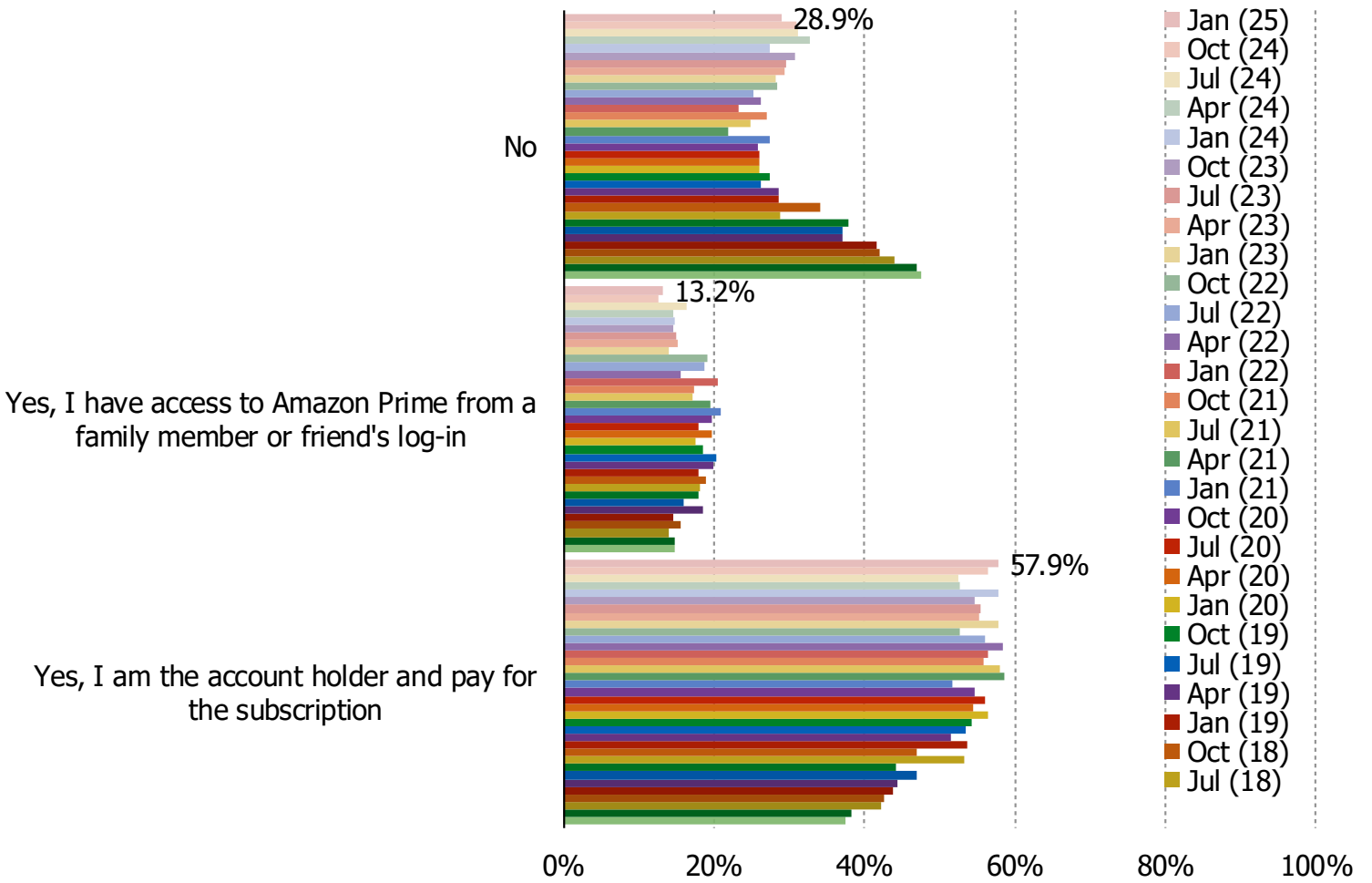
Posed to users of each site/app.



AMZN PRIME TRENDS

ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

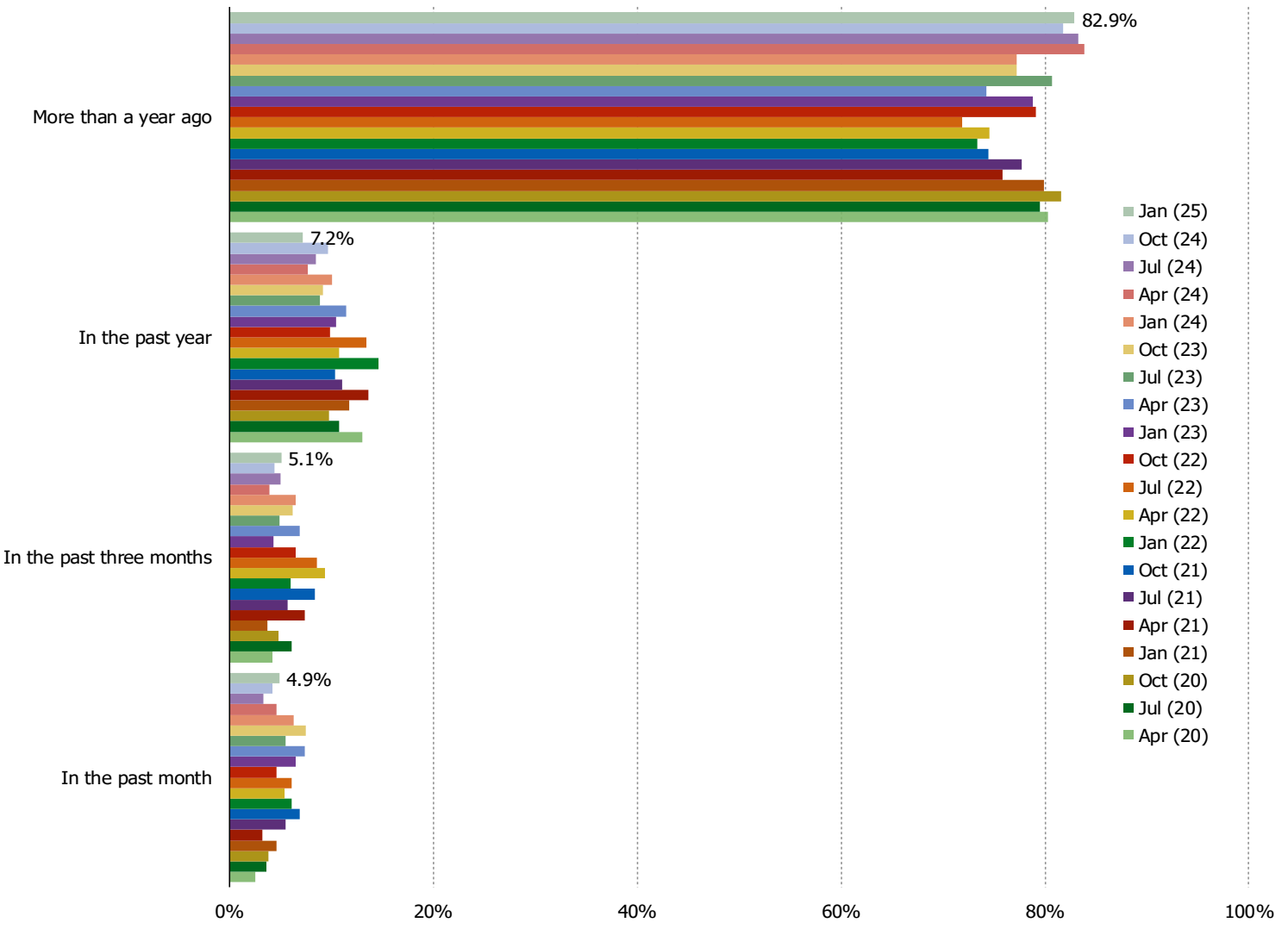
Posed to Amazon users



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.

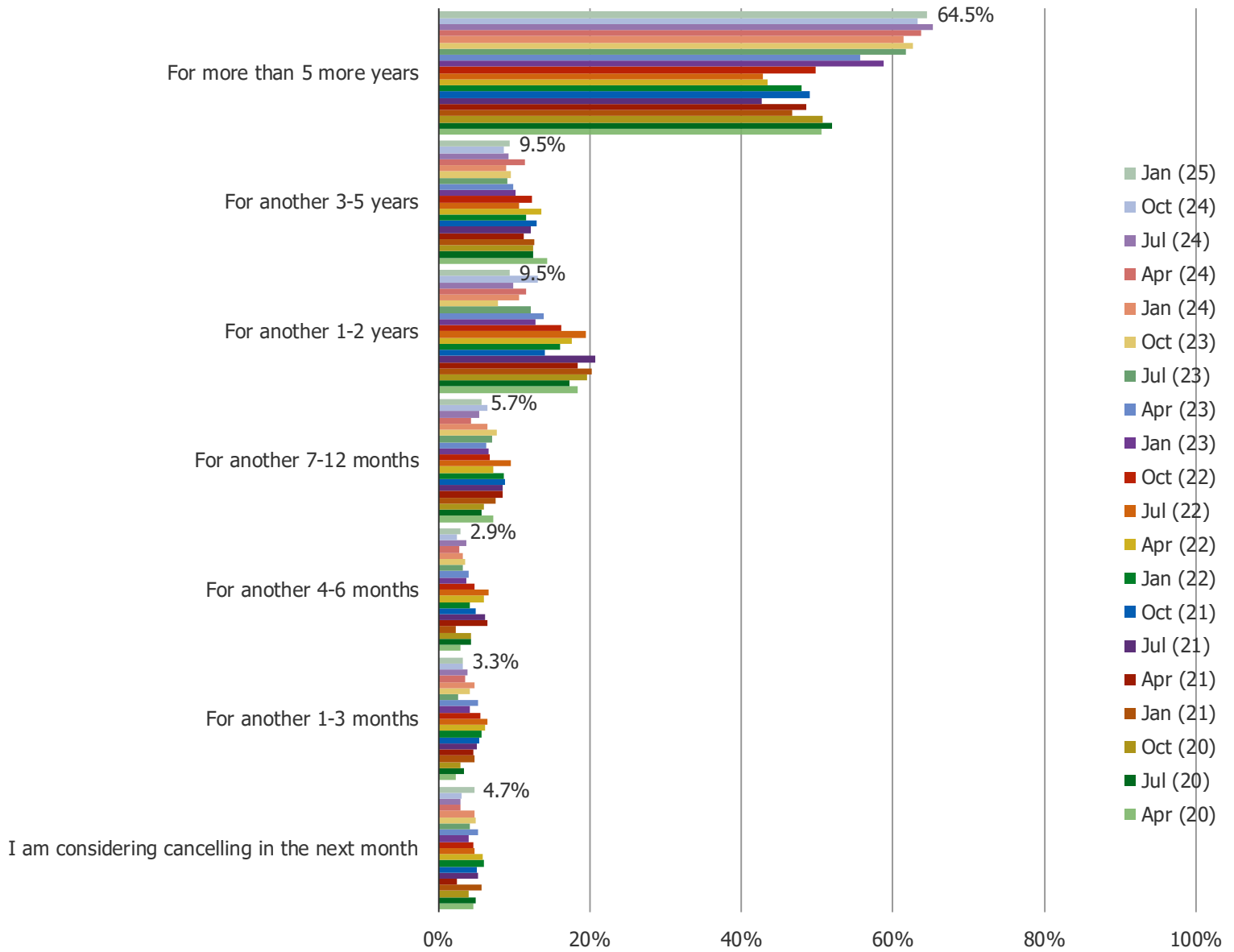
WHEN DID YOU START YOUR CURRENT AMAZON PRIME MEMBERSHIP?

Posed to Amazon users who are Prime members.



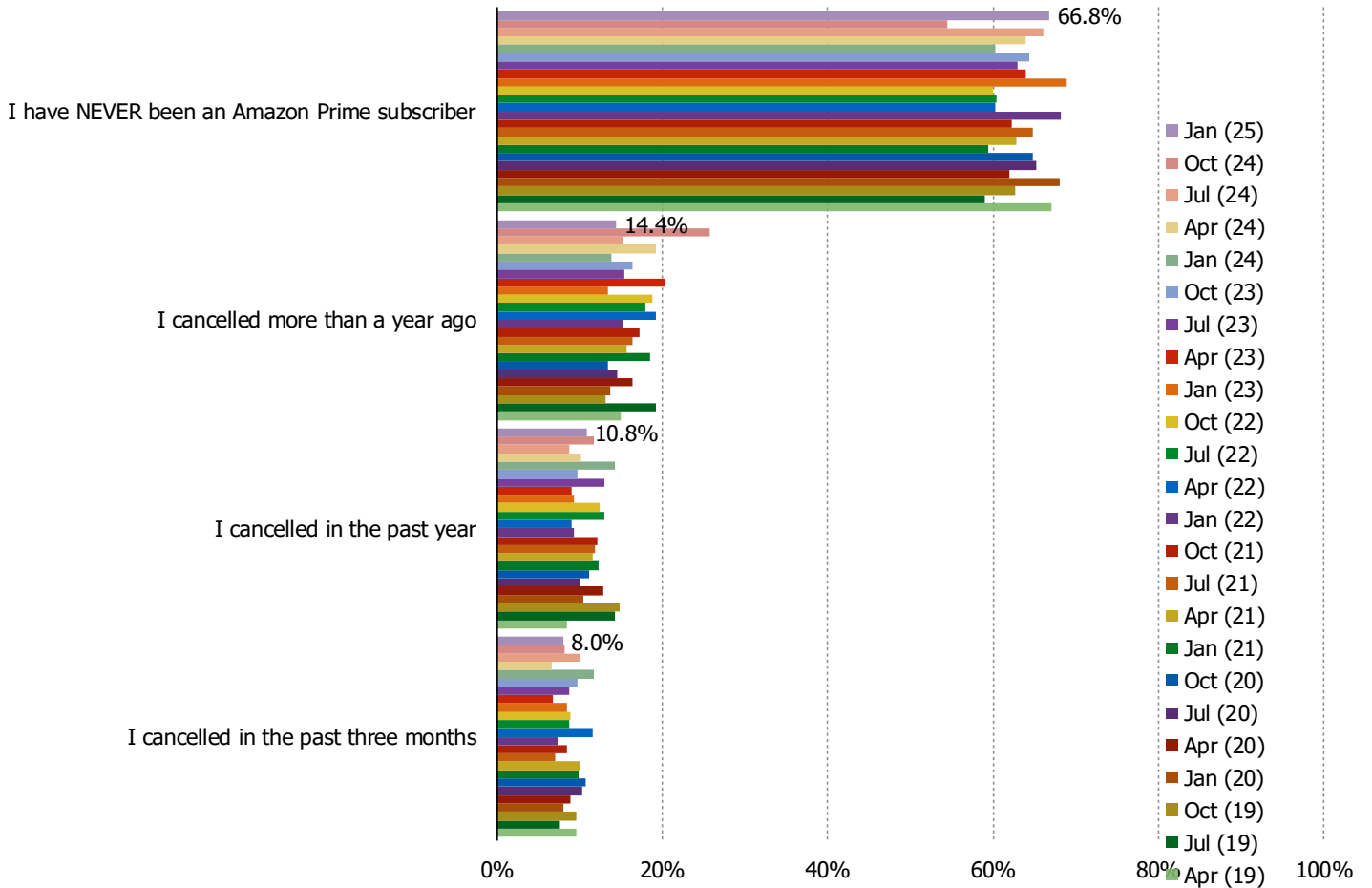
FOR HOW MUCH LONGER DO YOU INTEND TO BE AN AMAZON PRIME MEMBER?

Posed to Amazon users who are Prime members.



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

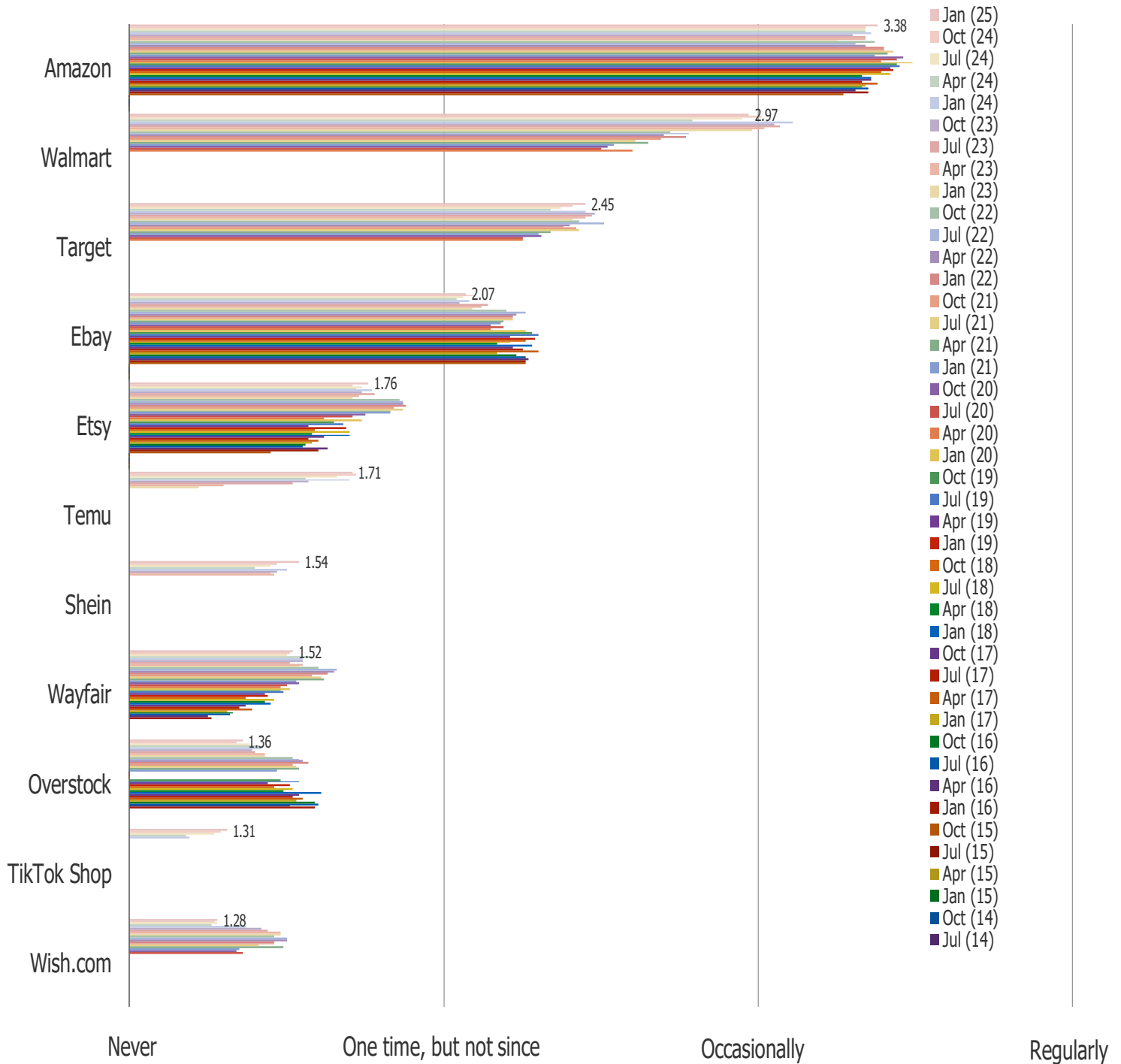
Posed to Amazon users who are not prime subscribers



COMPETITIVE DYNAMICS

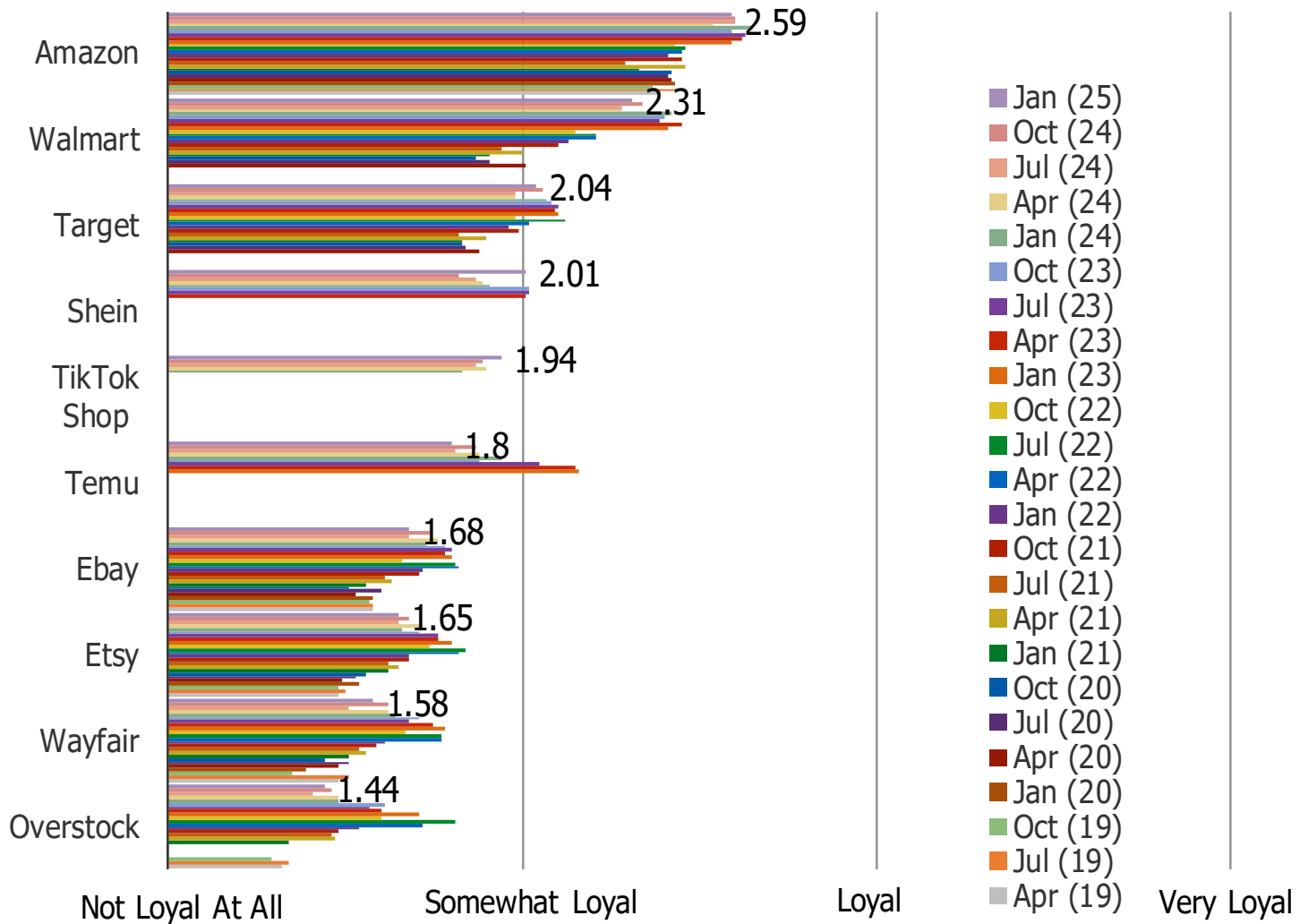
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



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

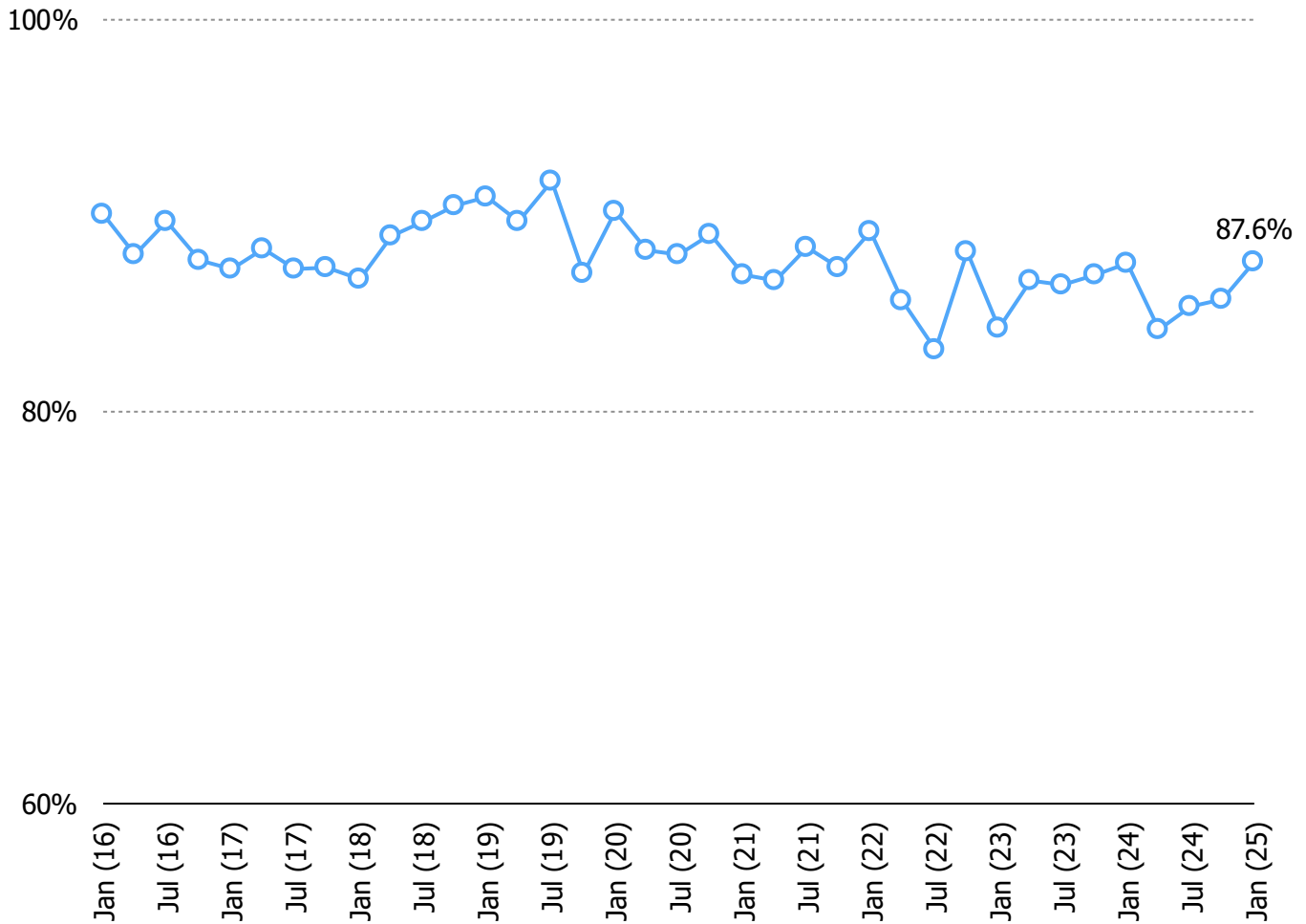
Posed to users of each site/app



AMZN TRENDS

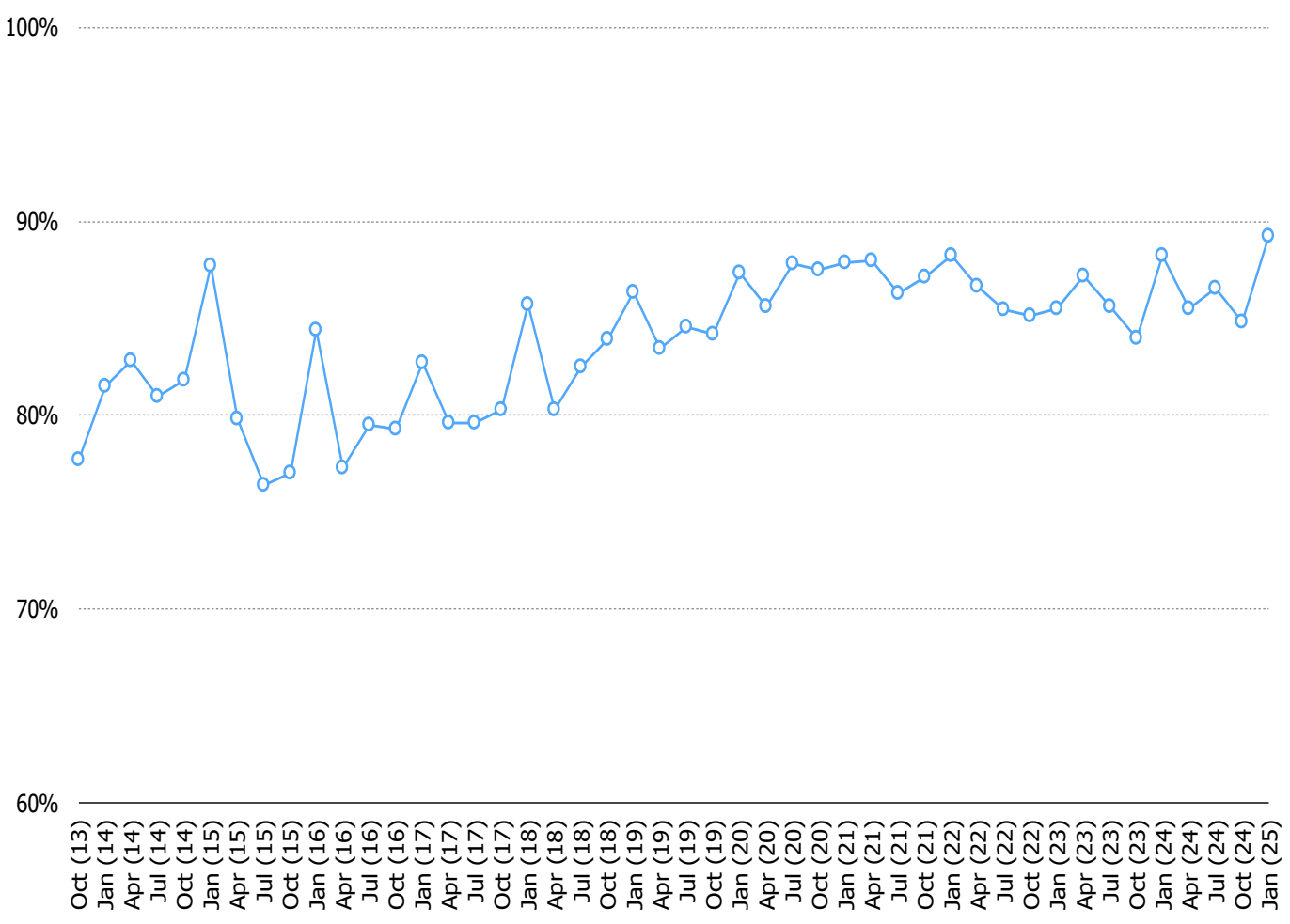
DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.



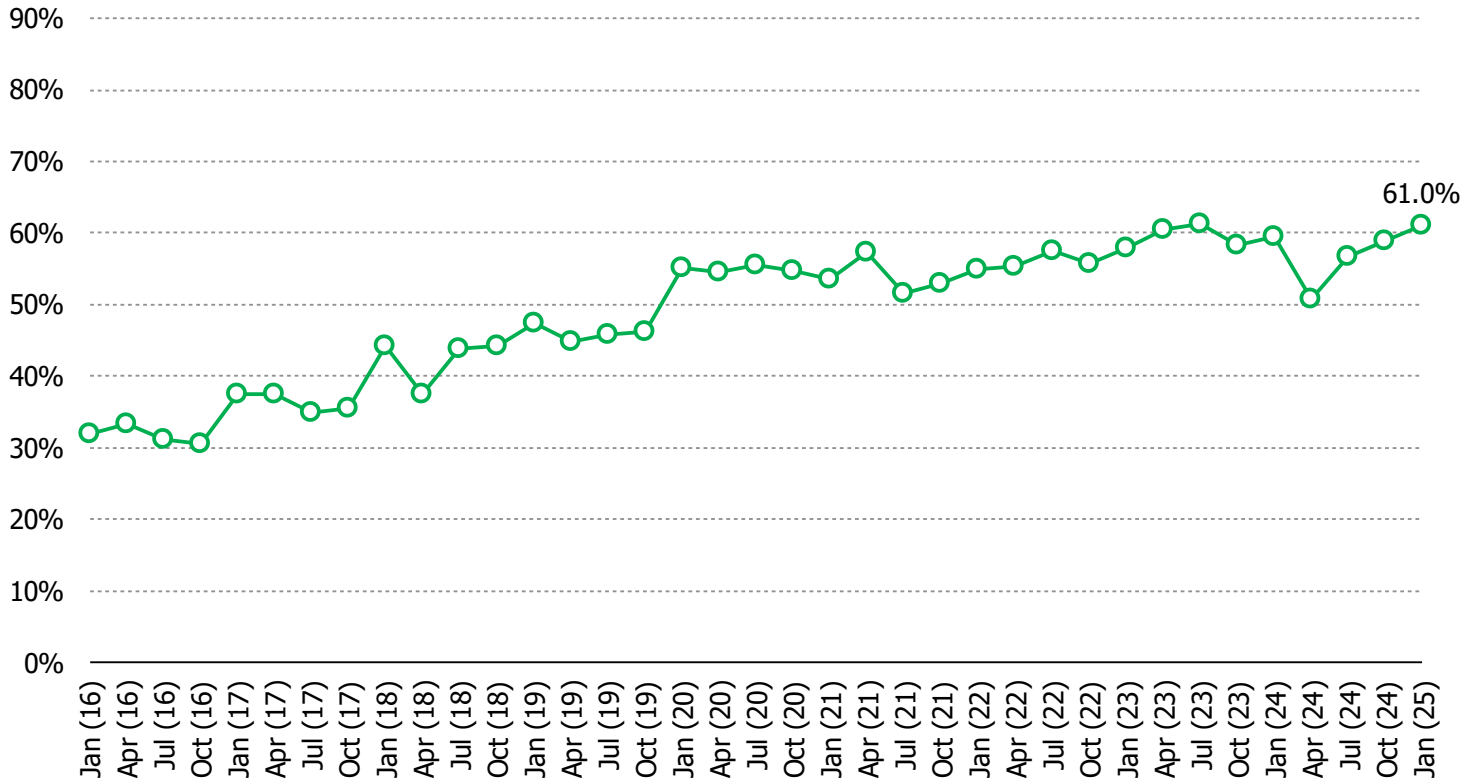
AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

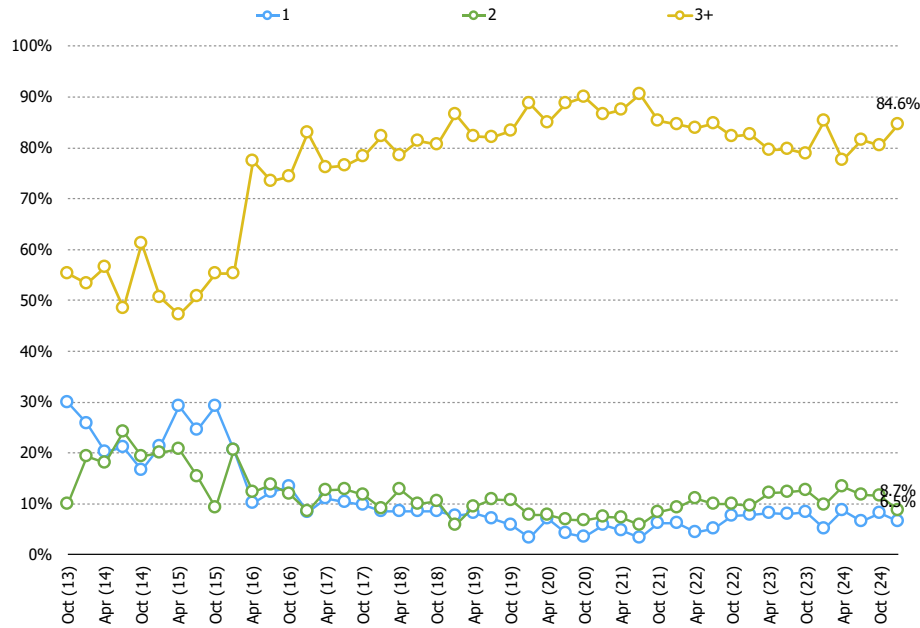


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

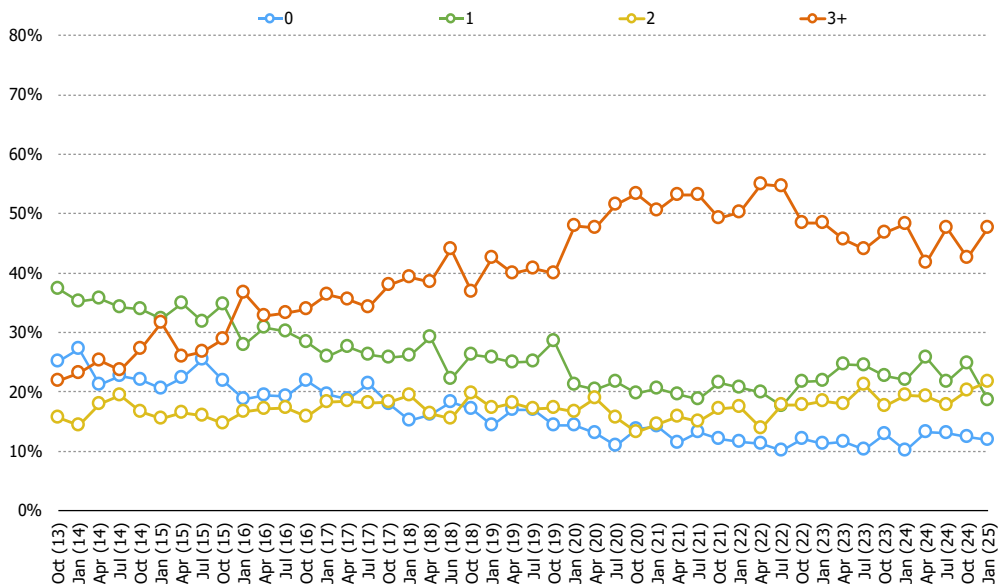
Posed to Amazon users



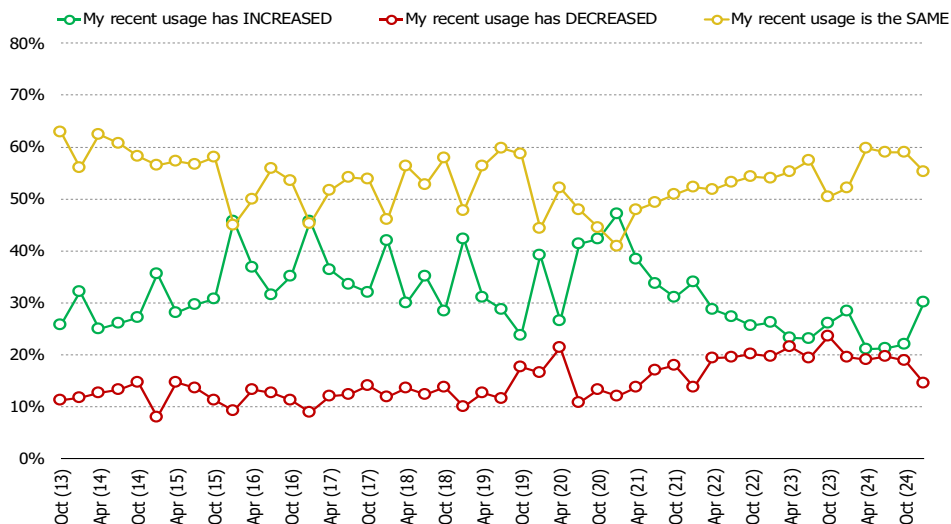
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



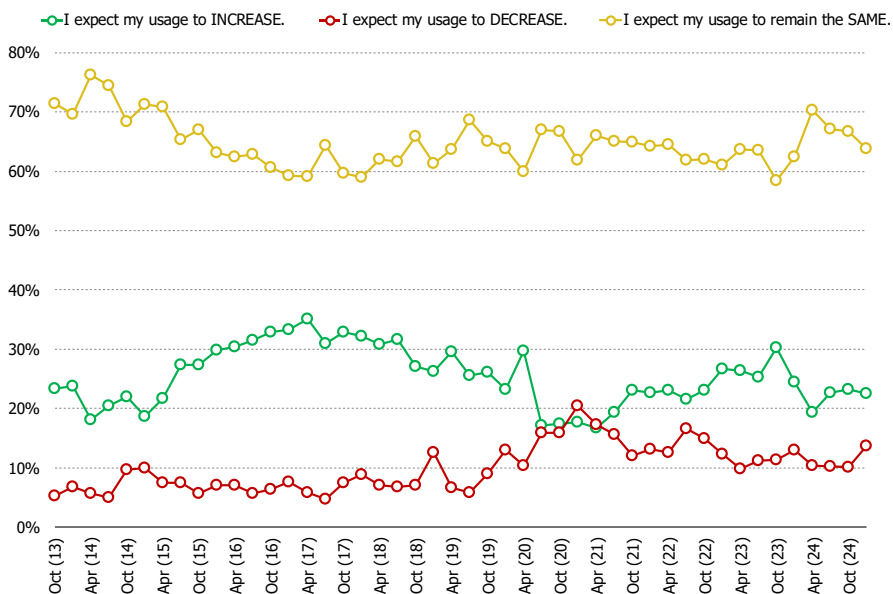
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



AMAZON USERS – RECENT USAGE

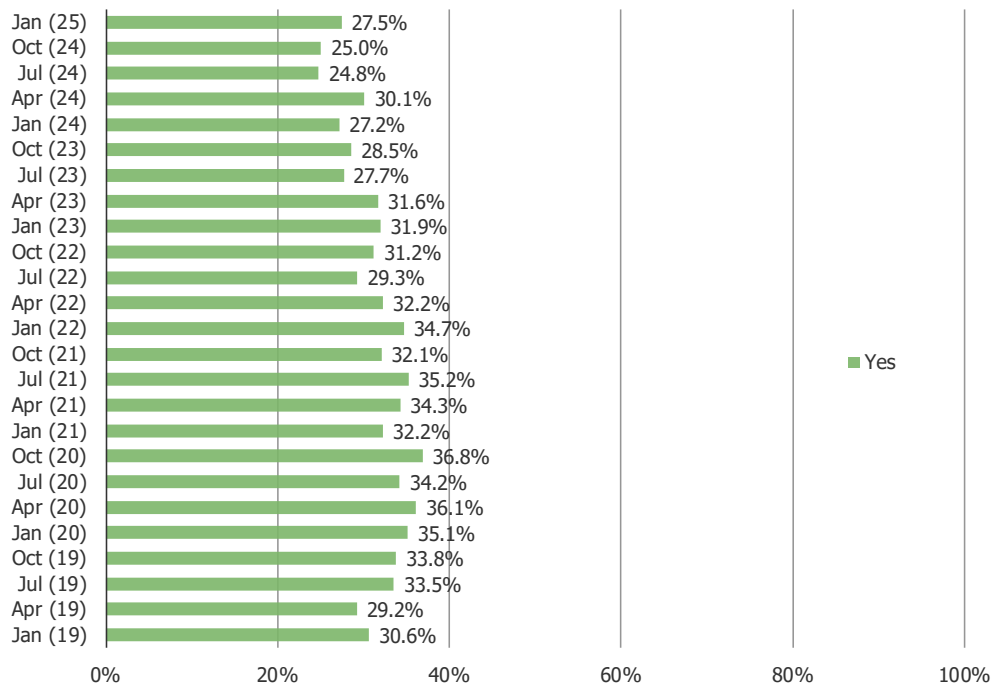


AMAZON USERS – EXPECTED USAGE

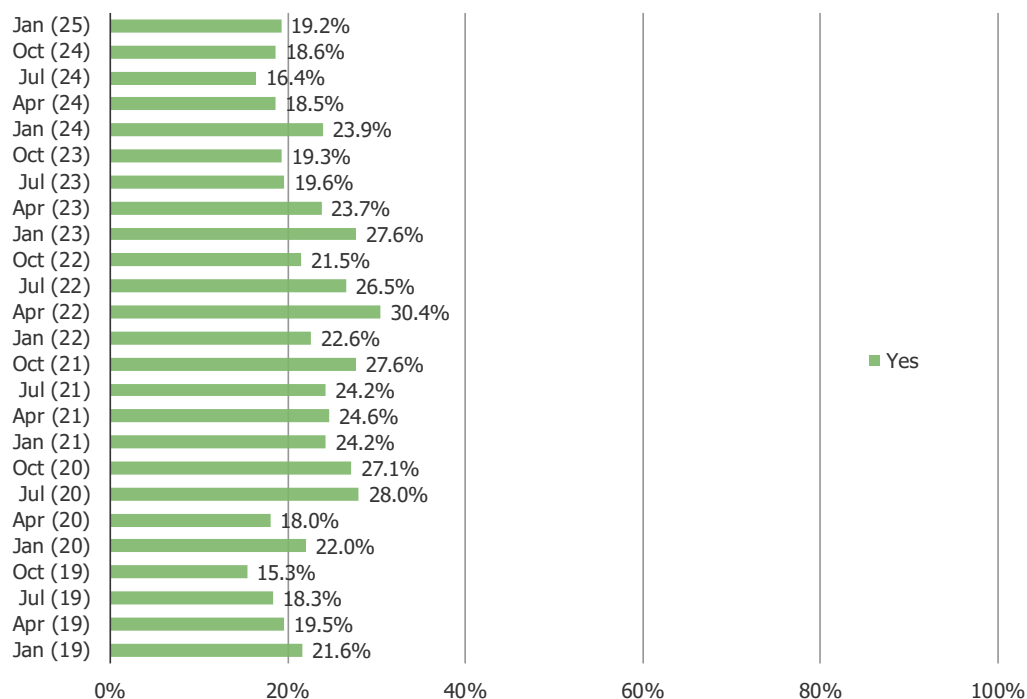


WAYFAIR TRENDS

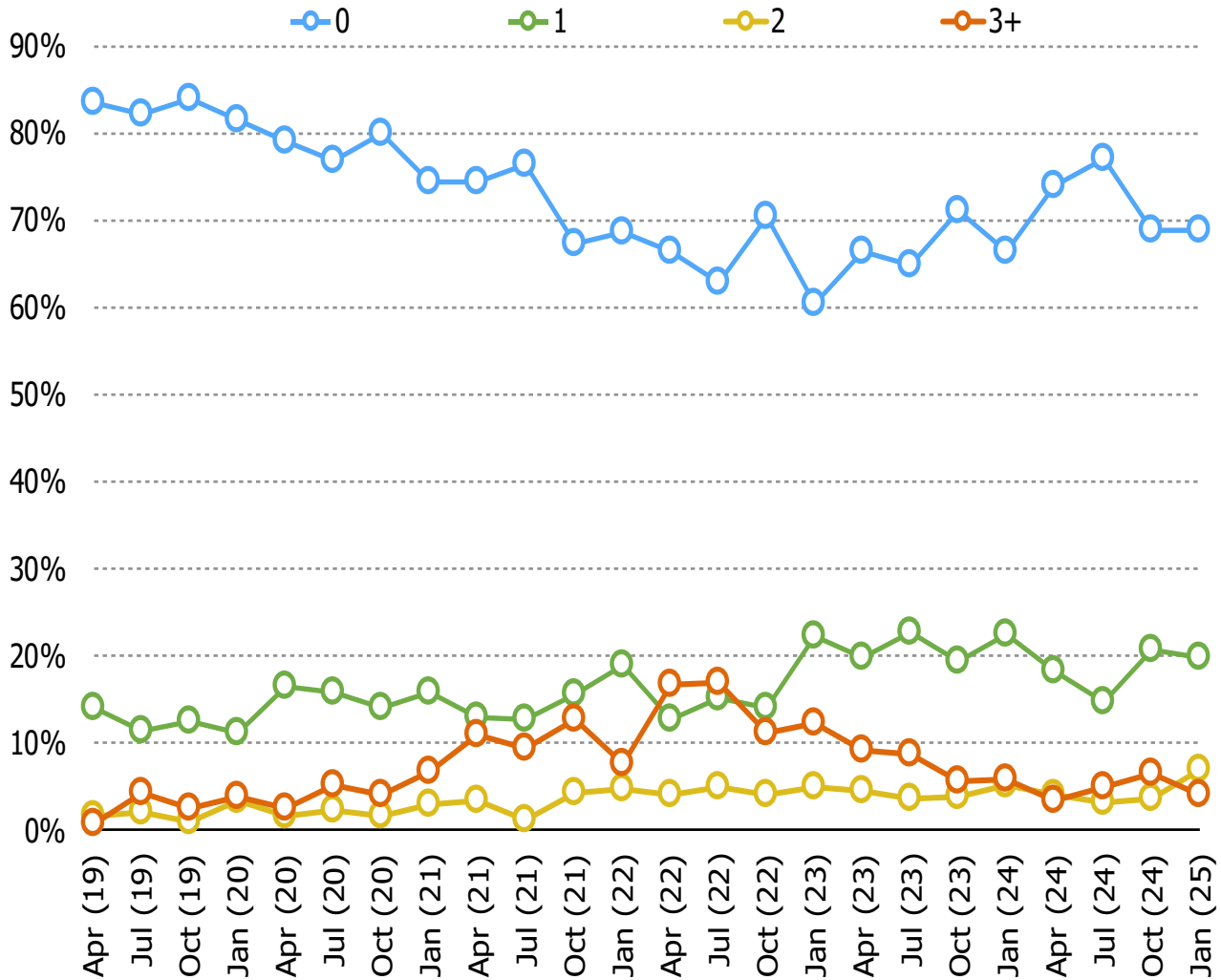
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



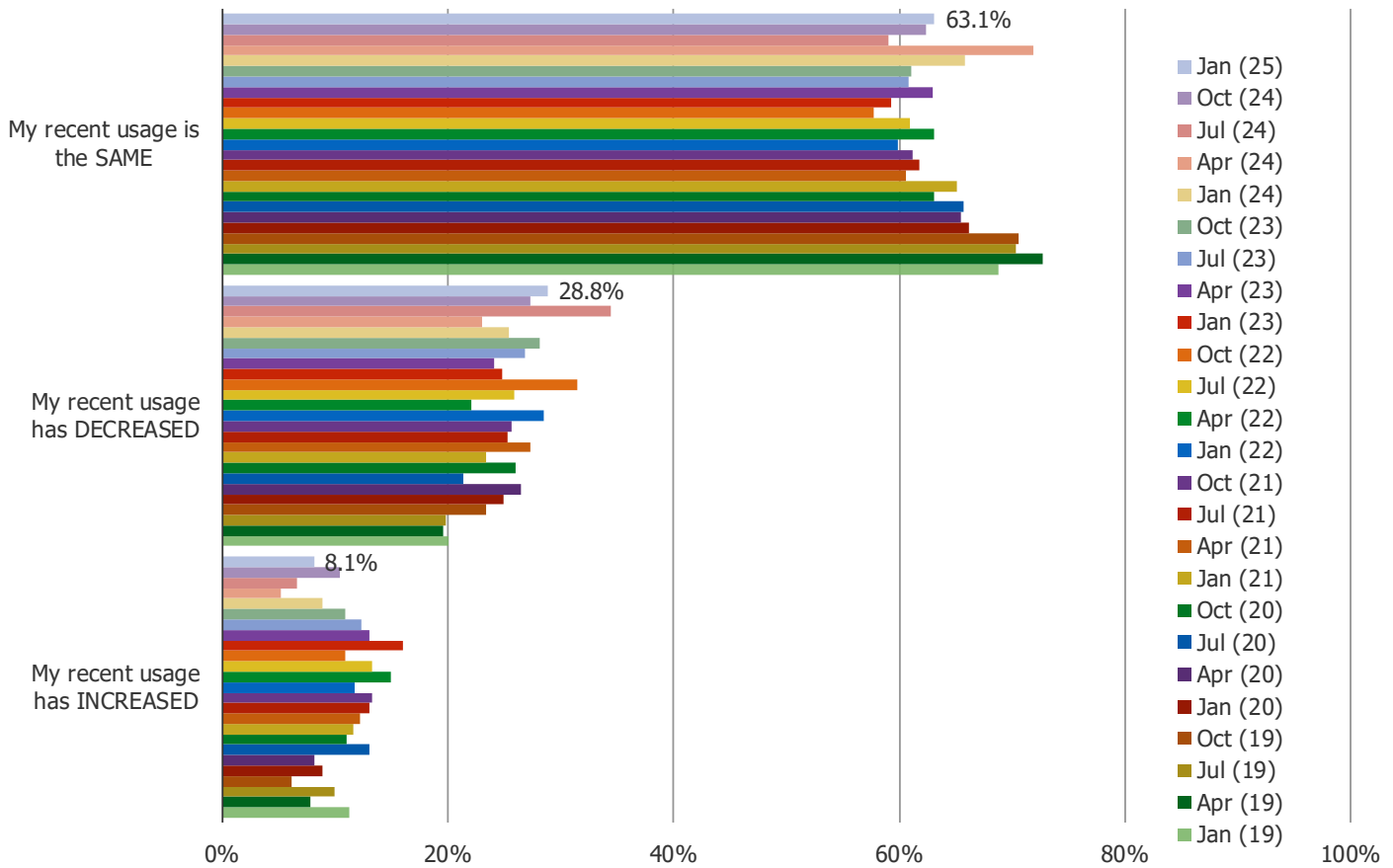
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE LAST THREE MONTHS?



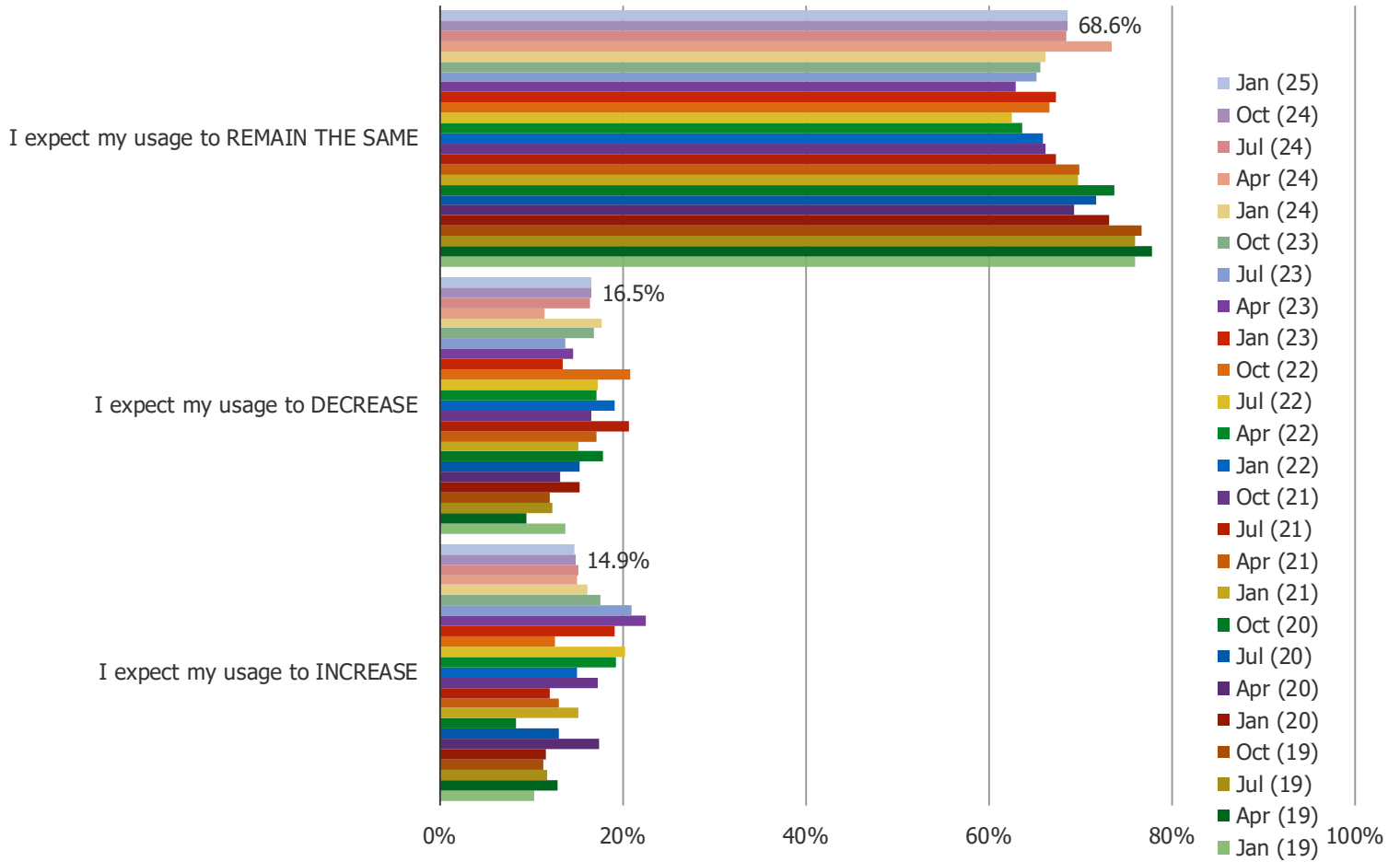
ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



WAYFAIR USERS – RECENT USAGE

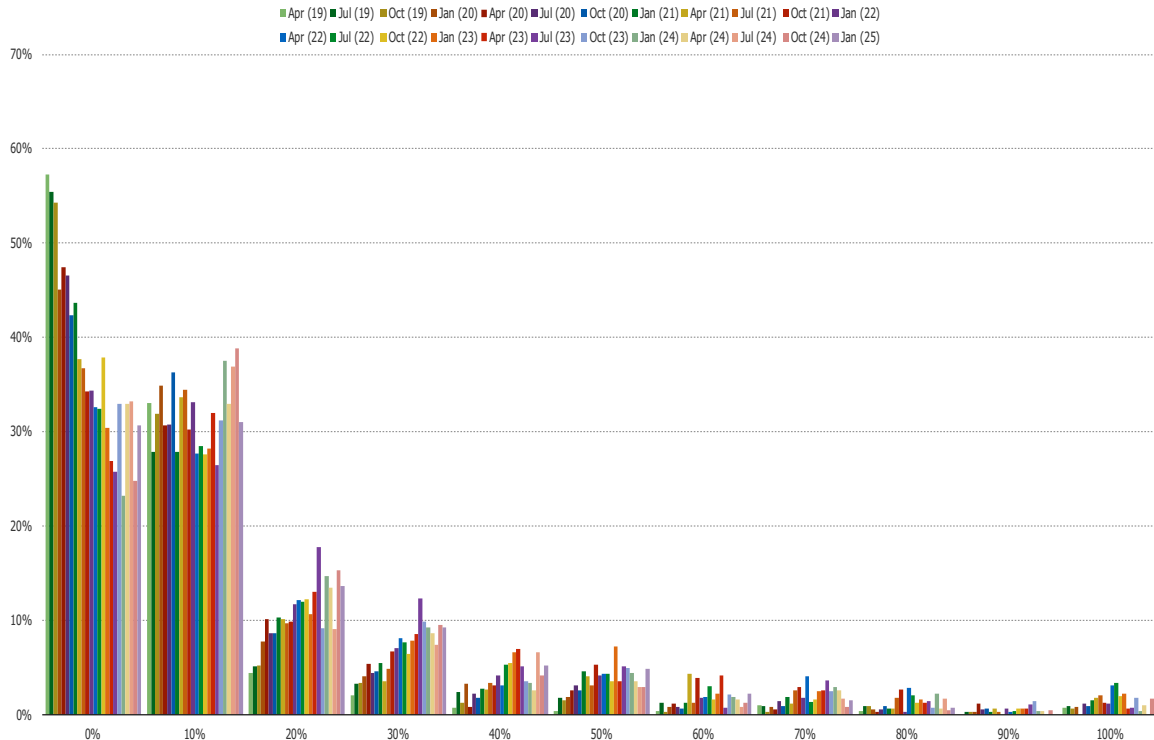


WAYFAIR USERS – EXPECTED USAGE

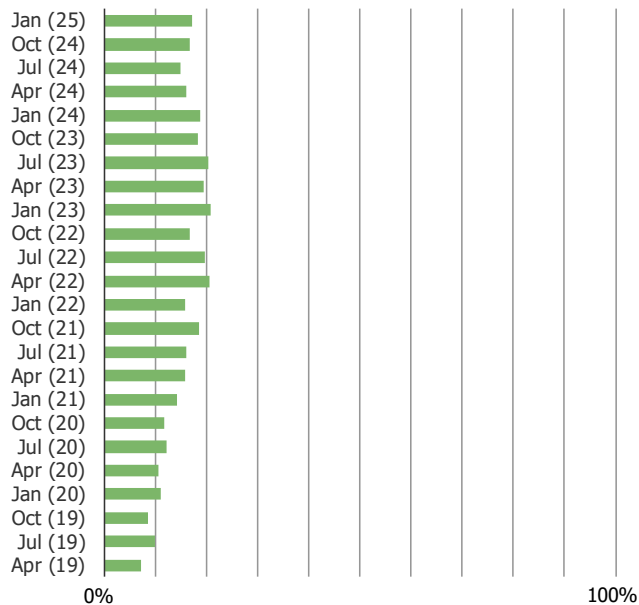


WAYFAIR USERS – WHAT PERCENTAGE OF YOUR TOTAL FURNITURE AND HOME FURNISHINGS PURCHASES DO YOU MAKE THROUGH WAYFAIR?

Posed to Wayfair users.

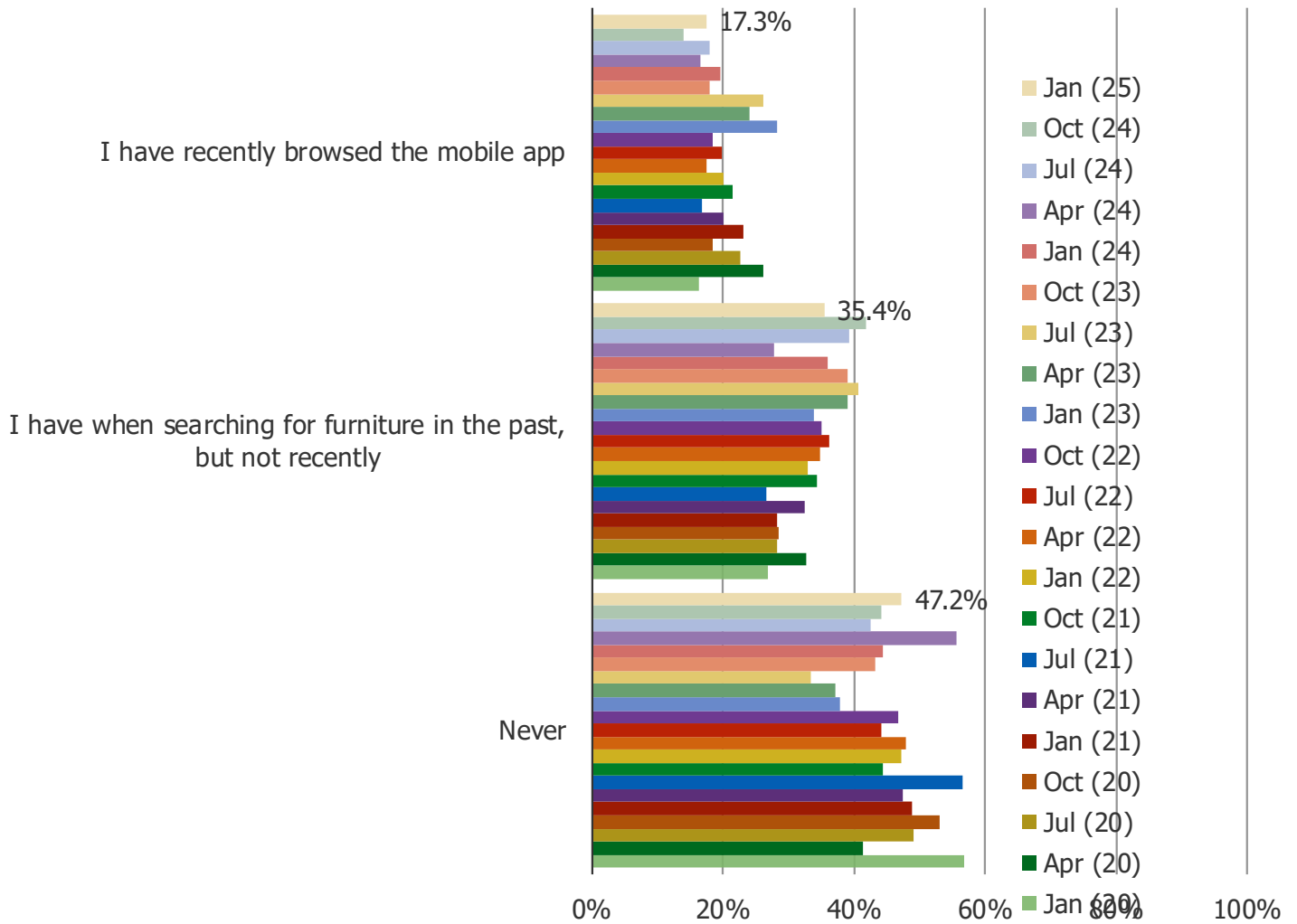


Weighted Average of Chart Above:



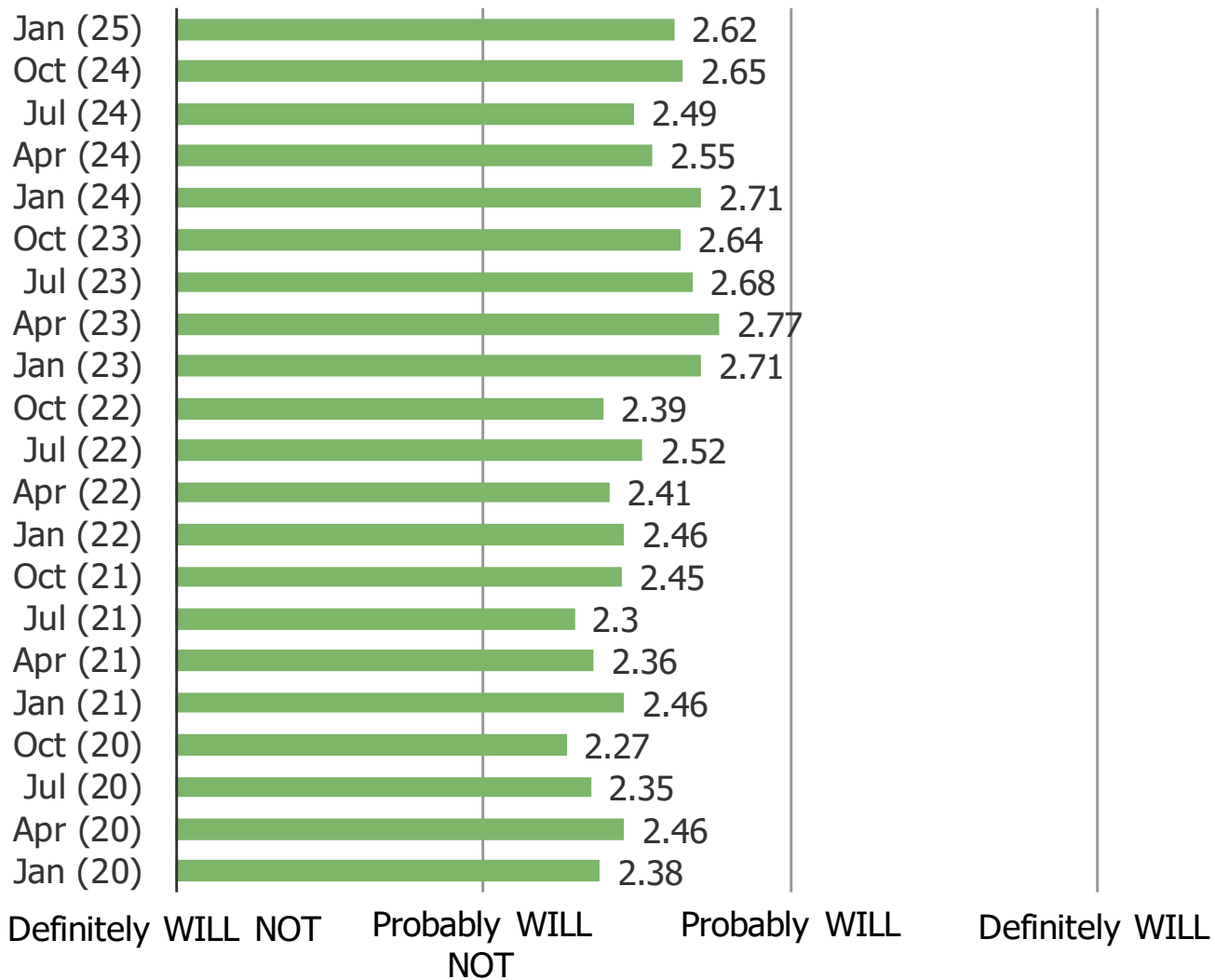
HAVE YOU EVER BROWSED THE WAYFAIR MOBILE APP FOR ITEMS?

Posed to Wayfair users.



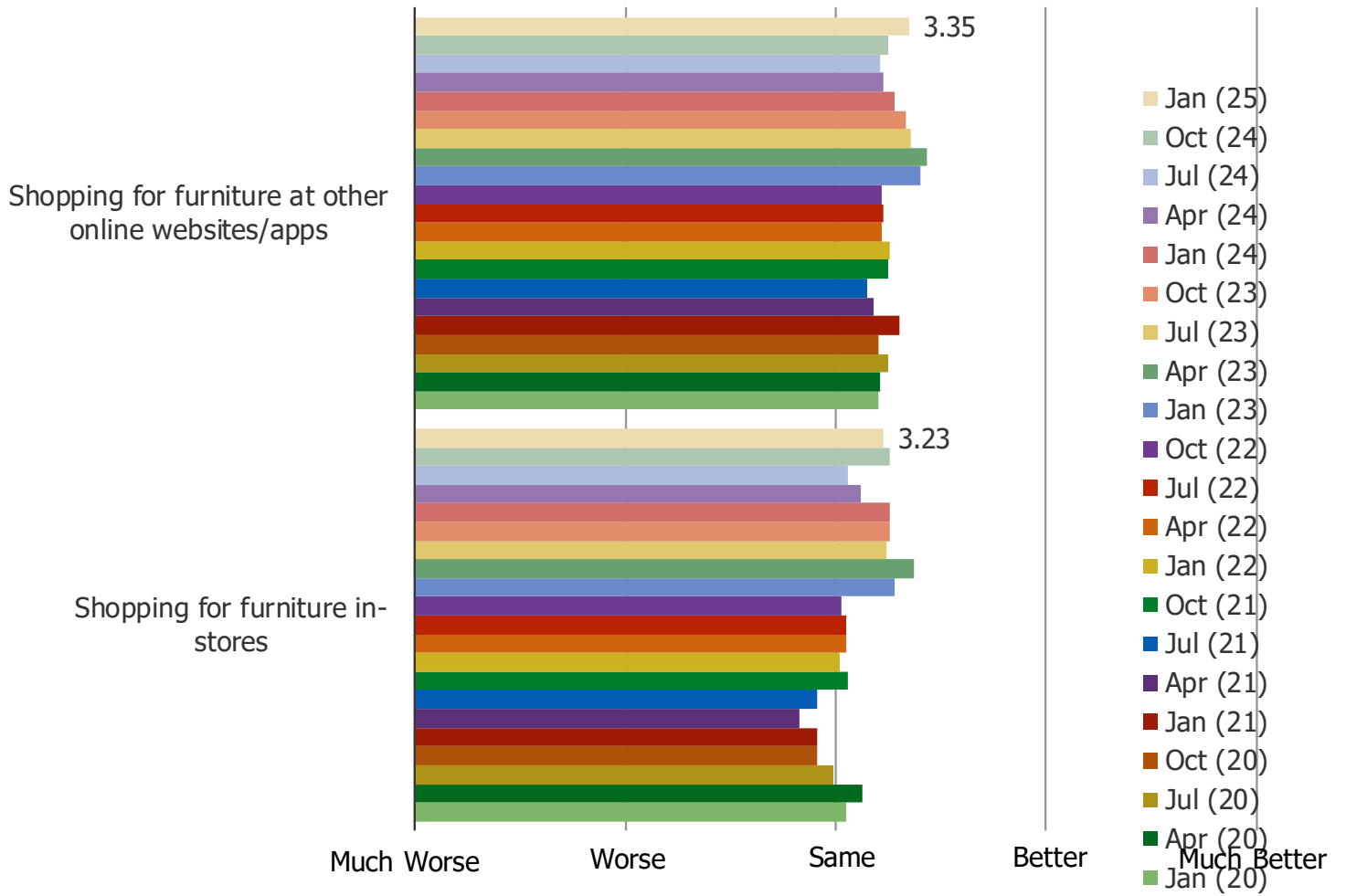
HOW LIKELY ARE YOU TO USE WAYFAIR FOR YOUR NEXT FURNITURE PURCHASE?

Posed to Wayfair users.



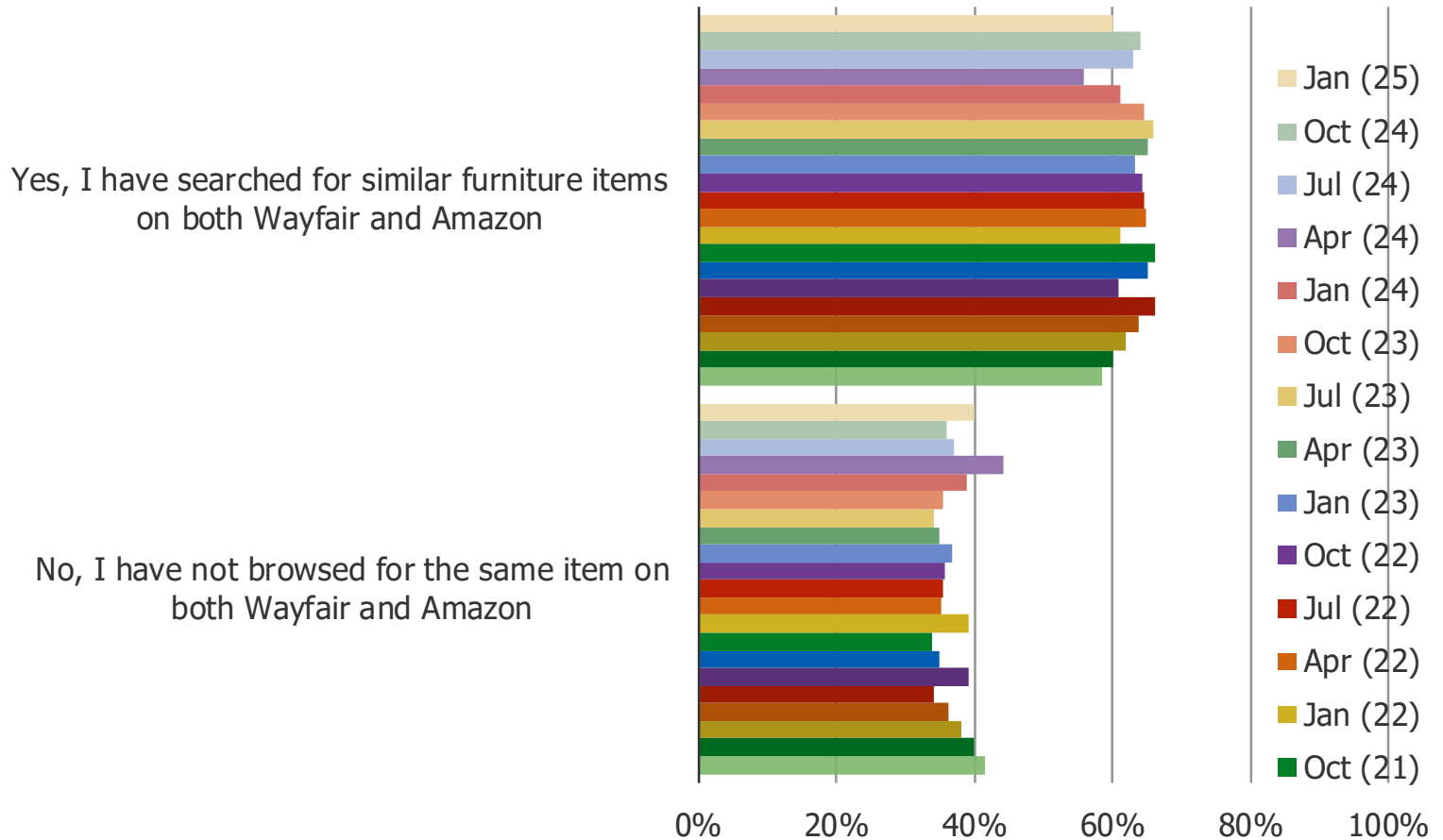
HOW DOES THE WAYFAIR SHOPPING EXPERIENCE COMPARE TO...

Posed to Wayfair users.



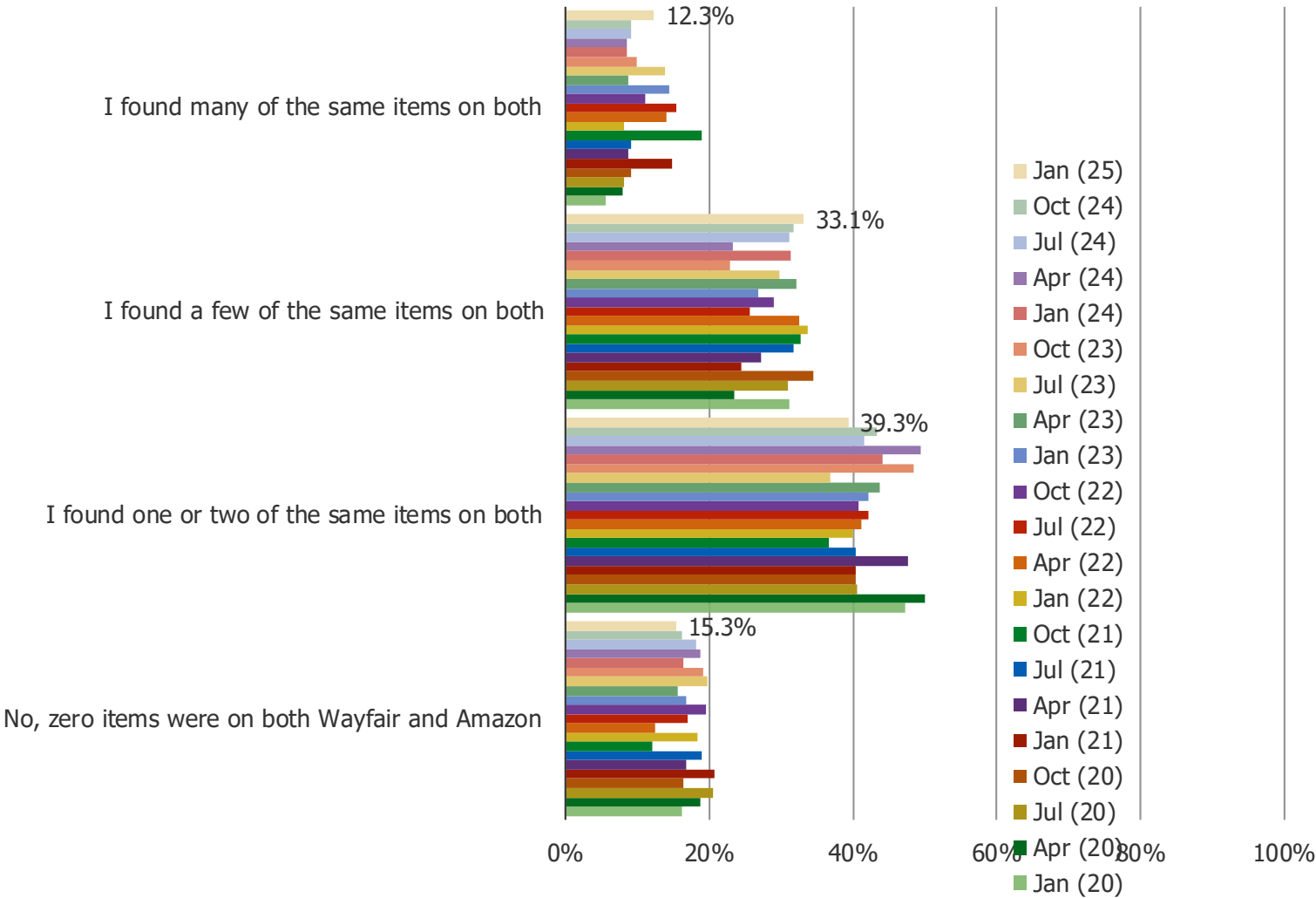
HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.



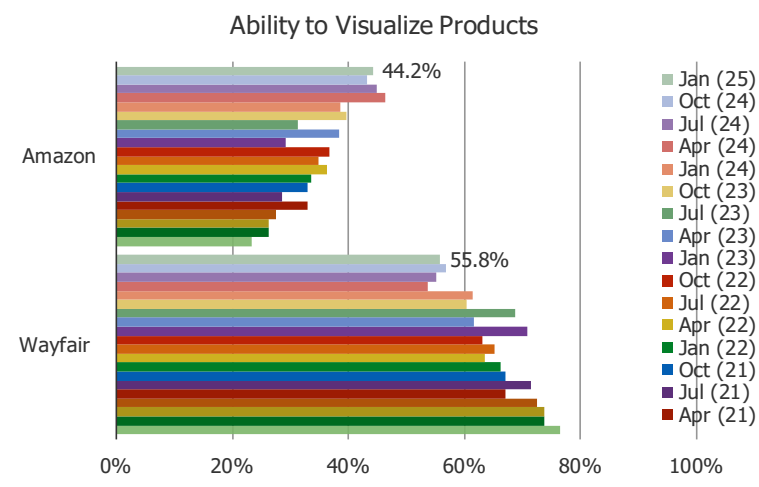
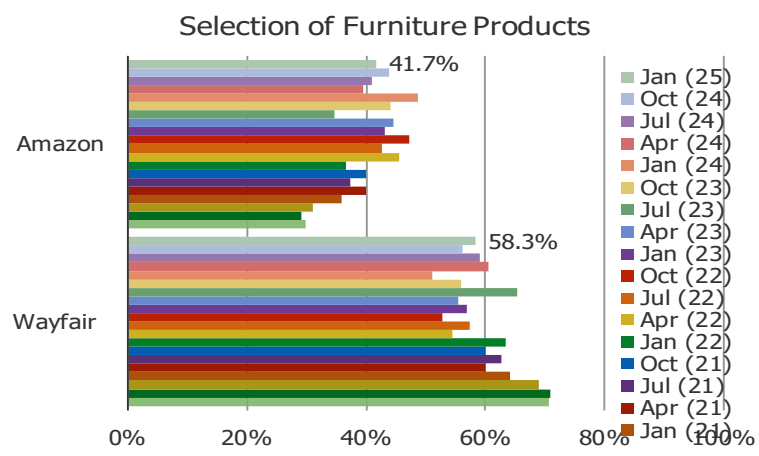
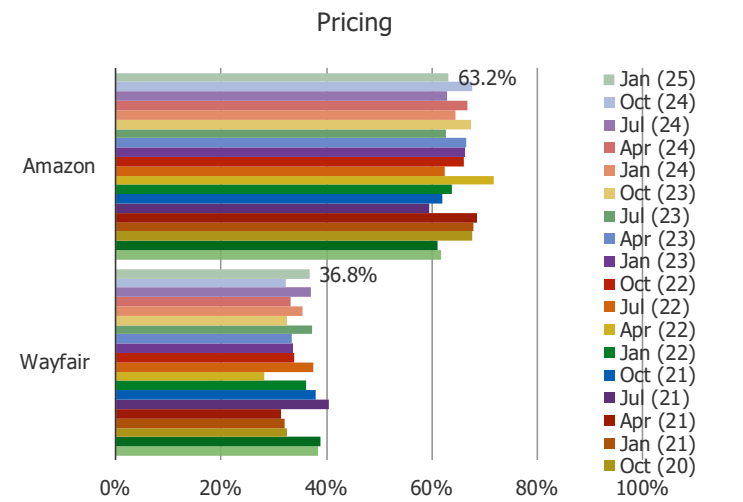
IN THE COURSE OF YOUR SEARCH, DID YOU FIND ANY ITEMS THAT WERE IDENTICAL AND LISTED ON BOTH WAYFAIR AND AMAZON?

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



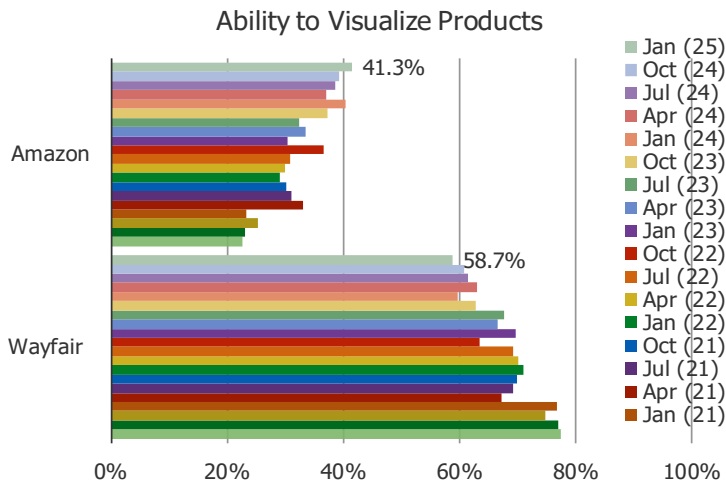
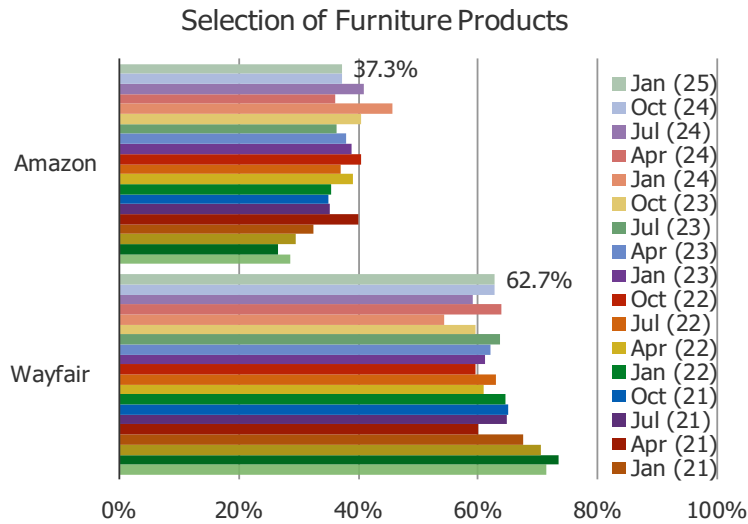
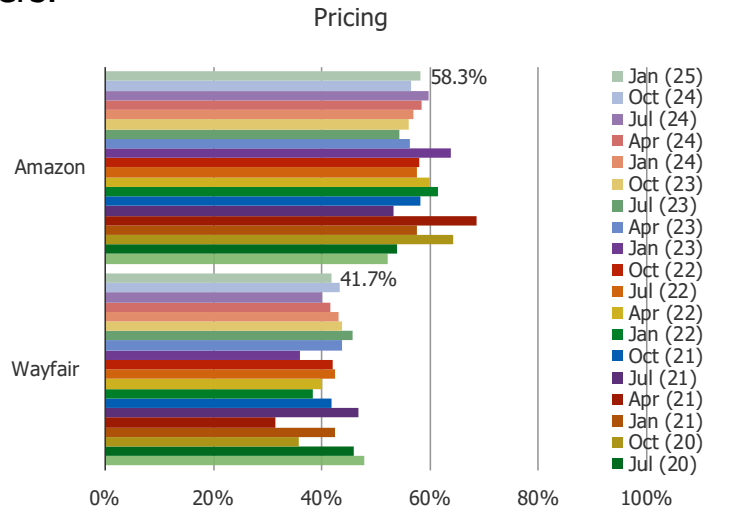
WHEN YOU WERE SHOPPING FOR THE SAME FURNITURE CATEGORY ON BOTH WAYFAIR AND AMAZON, WHICH PLATFORM HAD BETTER...

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



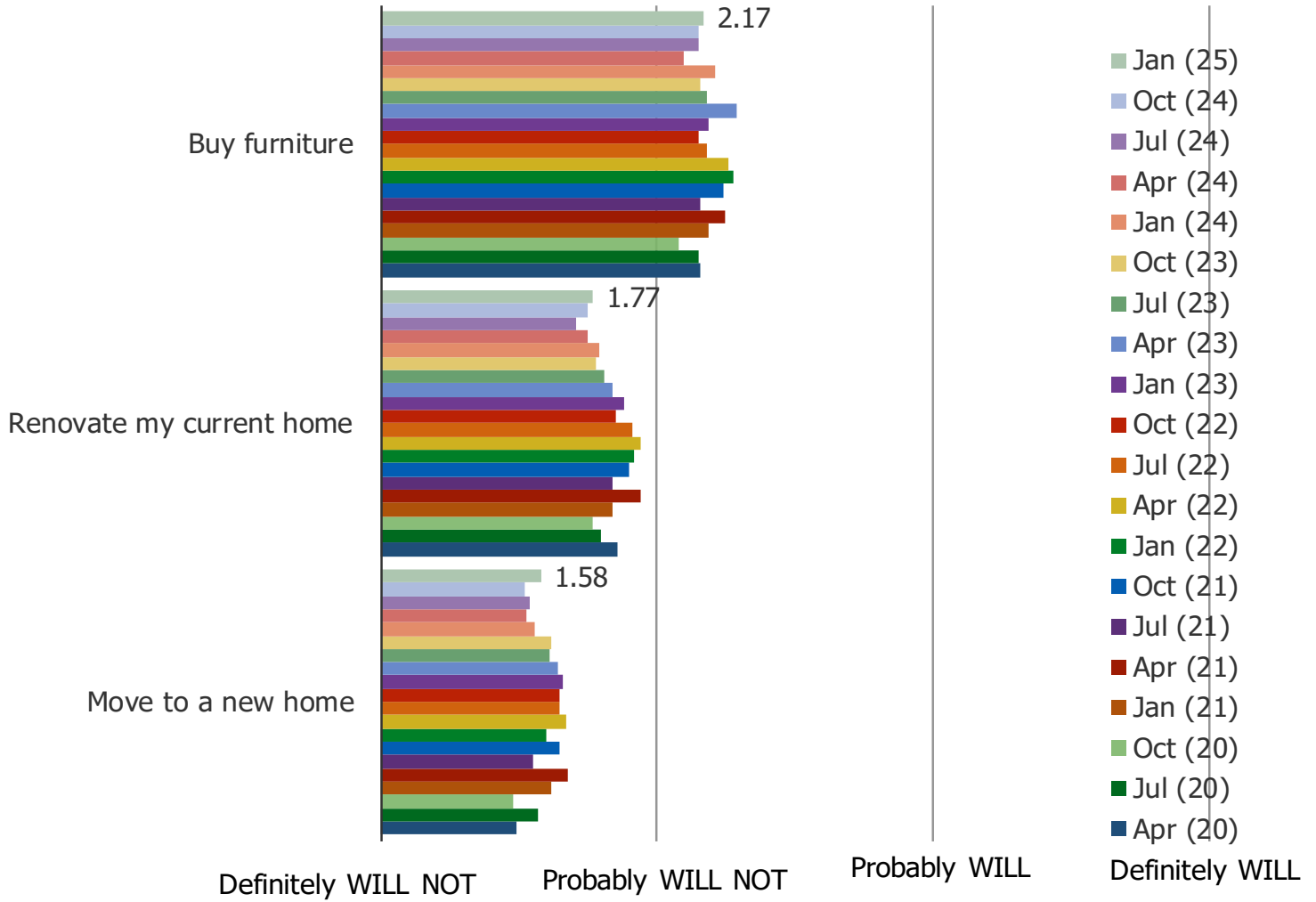
IF YOU NEEDED TO SHOP FOR A TYPE OF FURNITURE TODAY, WHICH PLATFORM DO YOU THINK WOULD HAVE BETTER...

Posed to ALL Wayfair users.



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

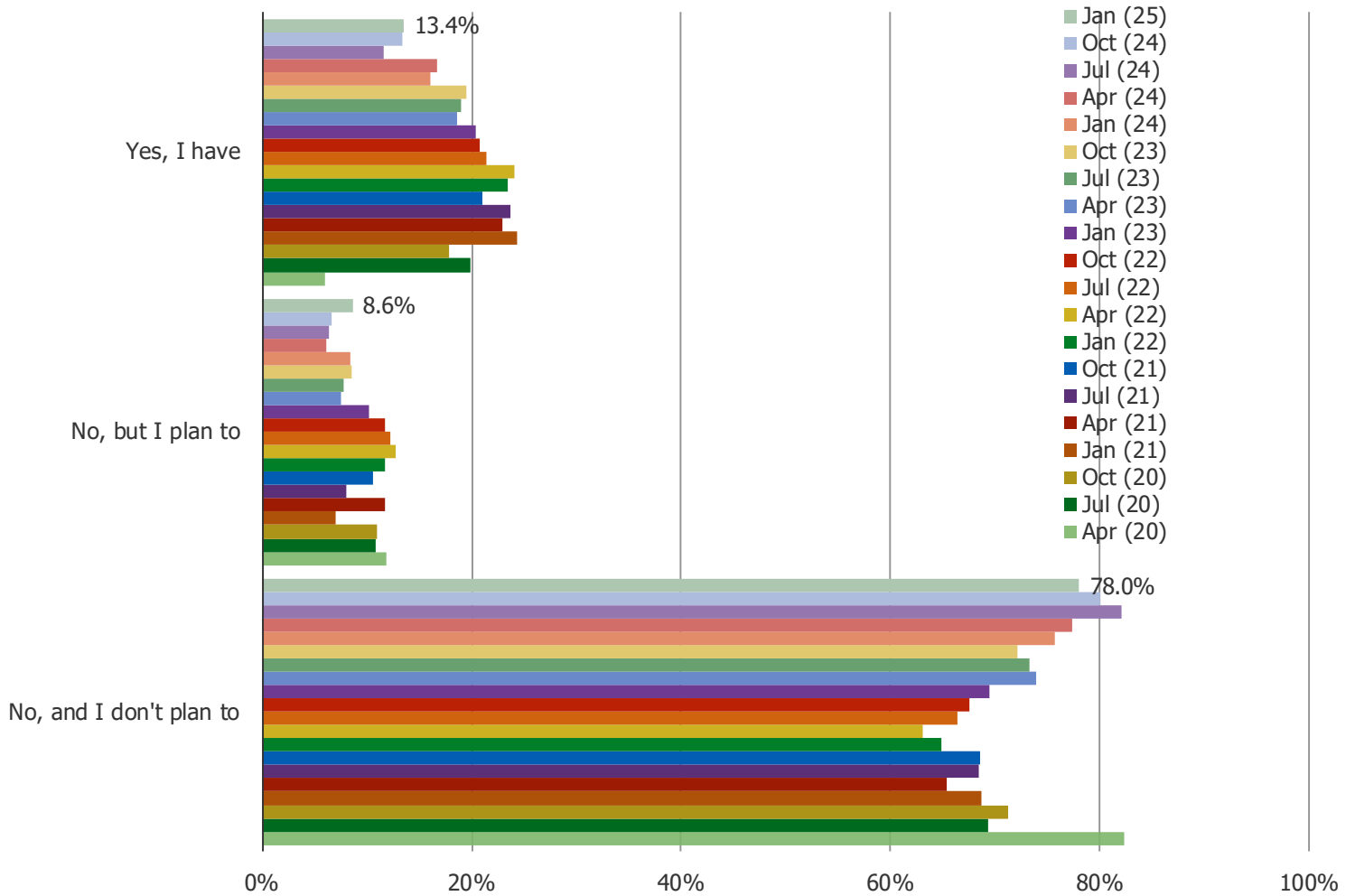
Posed to ALL respondents.



ETSY TRENDS

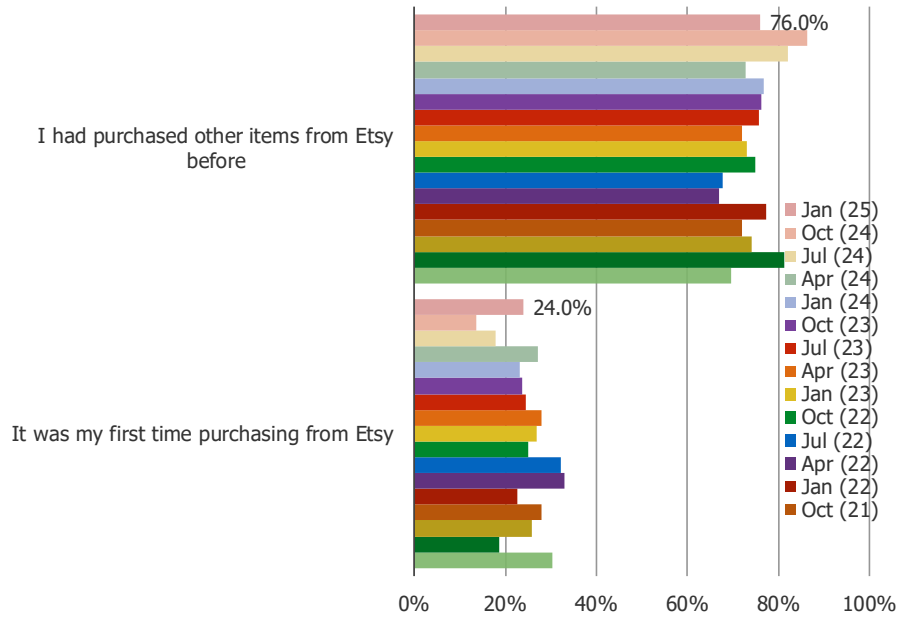
HAVE YOU PURCHASED ANY MASKS / PROTECTIVE FACE MASKS ON ETSY SINCE THE START OF THE PANDEMIC?

Posed to Etsy users.



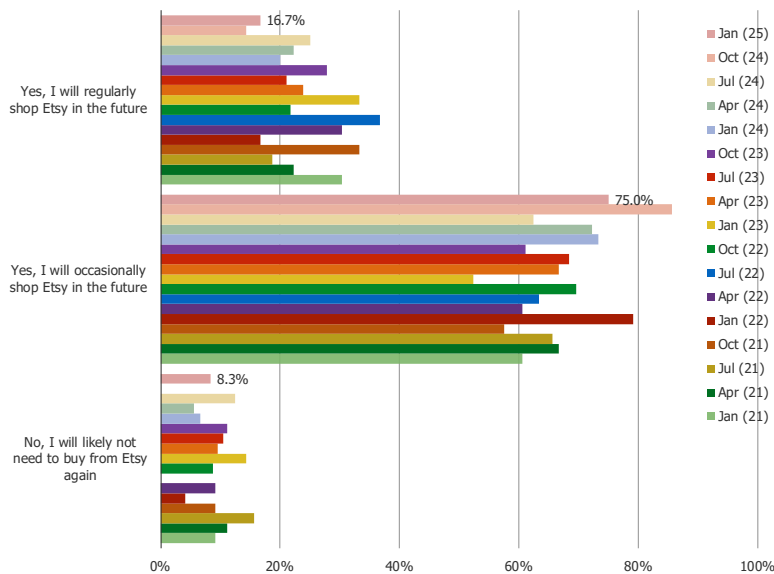
THINKING ABOUT YOUR MASK PURCHASE FROM ETSY, WAS IT YOUR FIRST TIME PURCHASING AN ITEM FROM ETSY OR HAD YOU ALREADY PURCHASED OTHER ITEMS FROM ETSY BEFORE?

Posed to users who purchased a mask from Etsy.

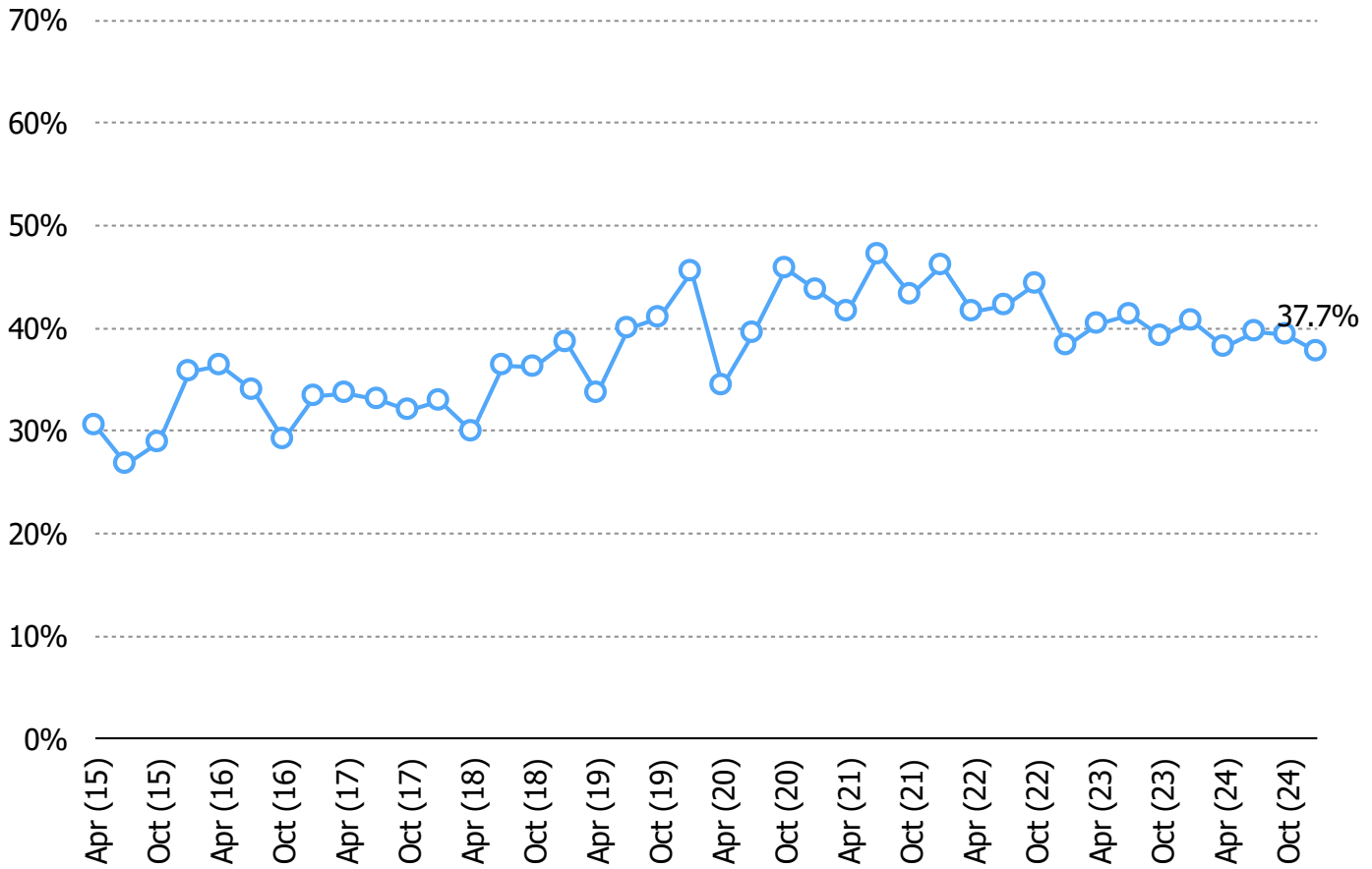


DO YOU EXPECT TO CONTINUE SHOPPING FOR PRODUCTS ON ETSY IN THE FUTURE?

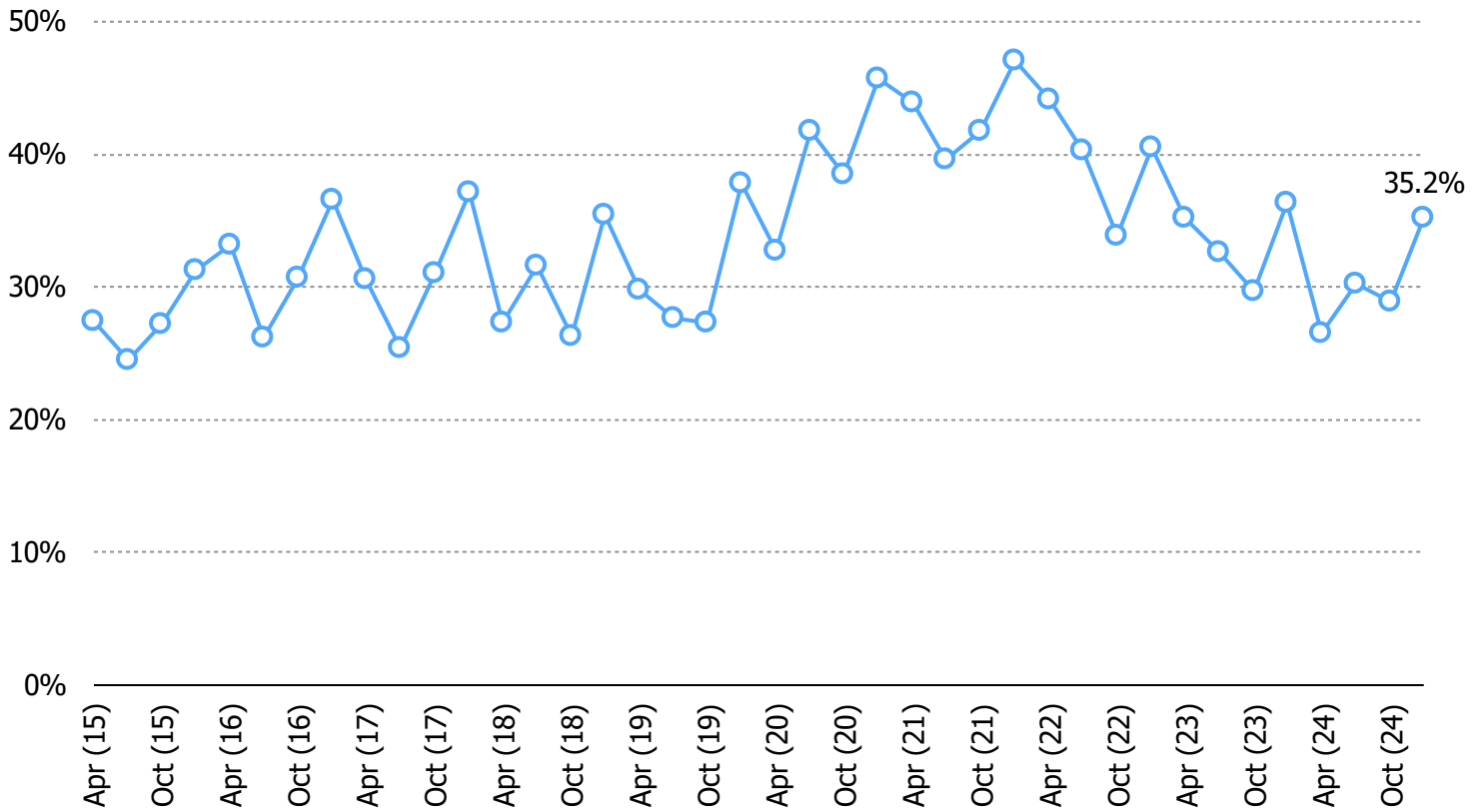
Posed to users whose first purchase from Etsy was a mask.



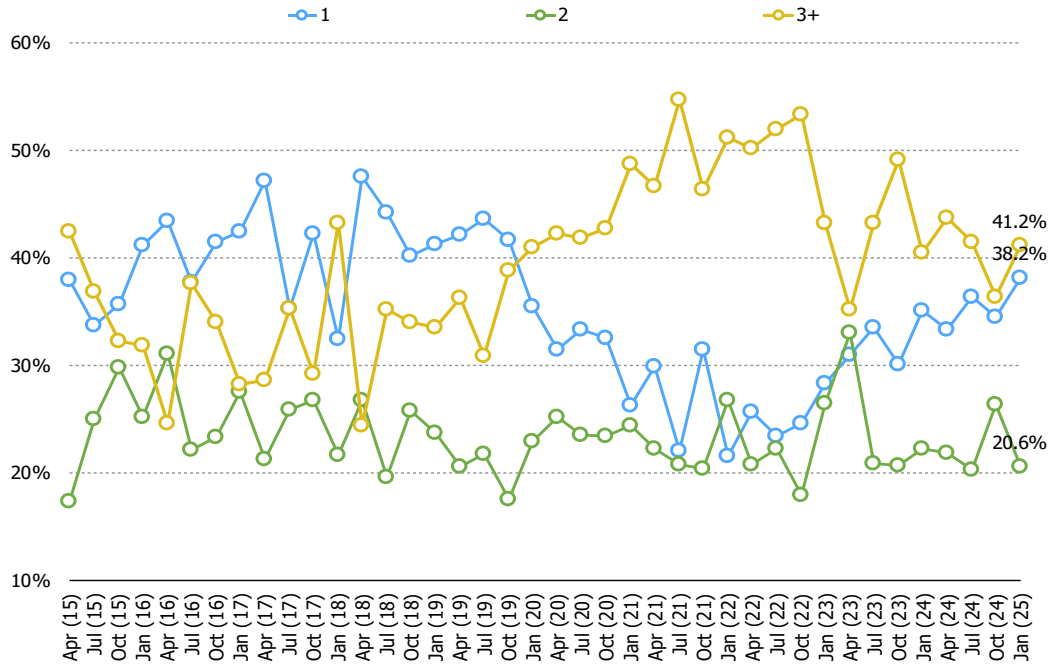
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



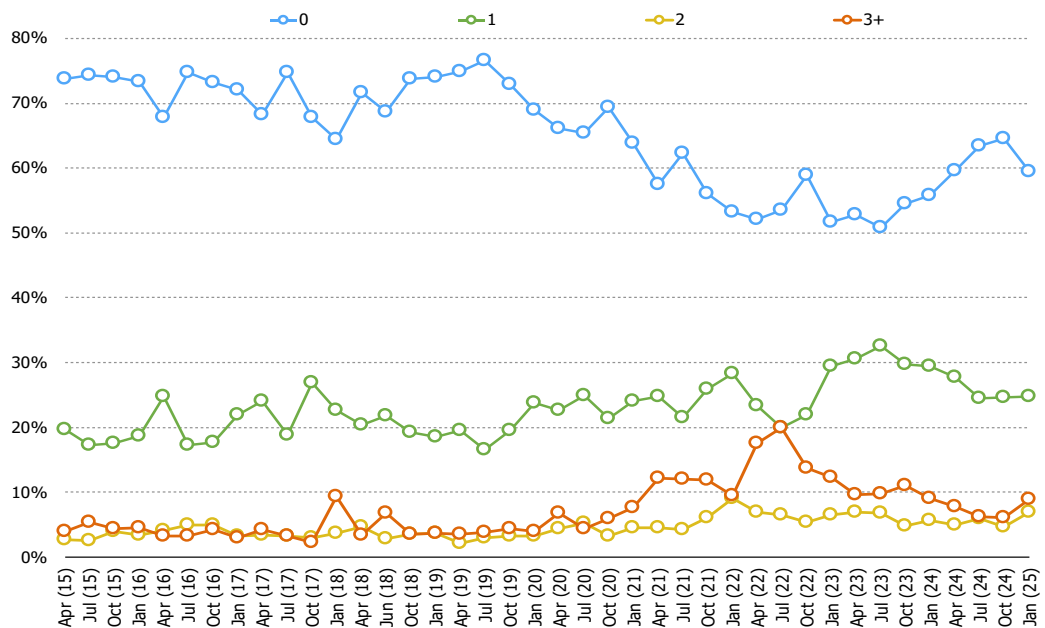
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



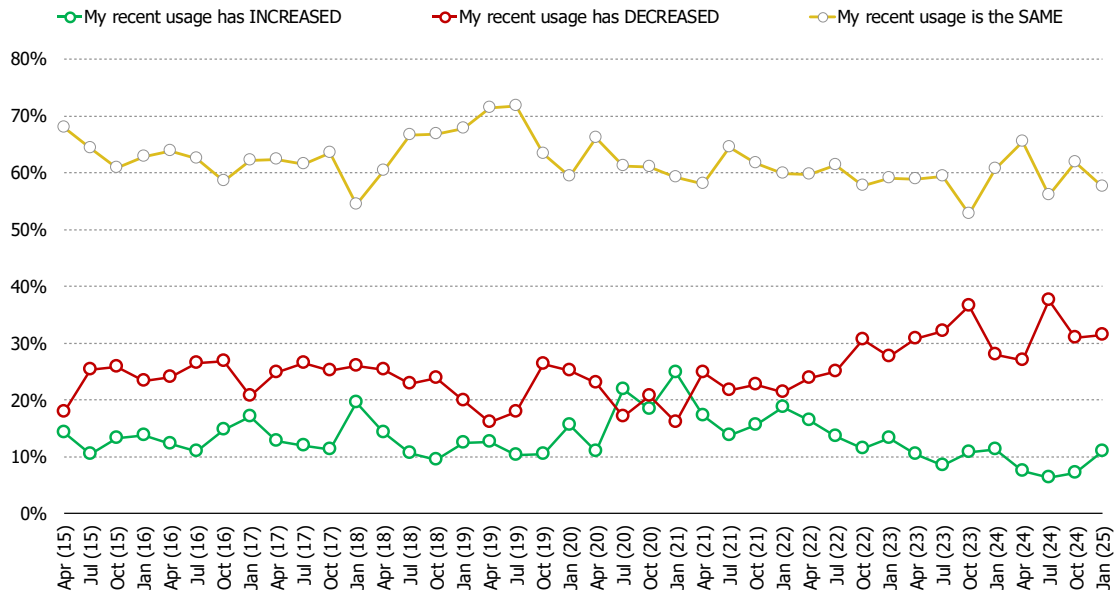
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



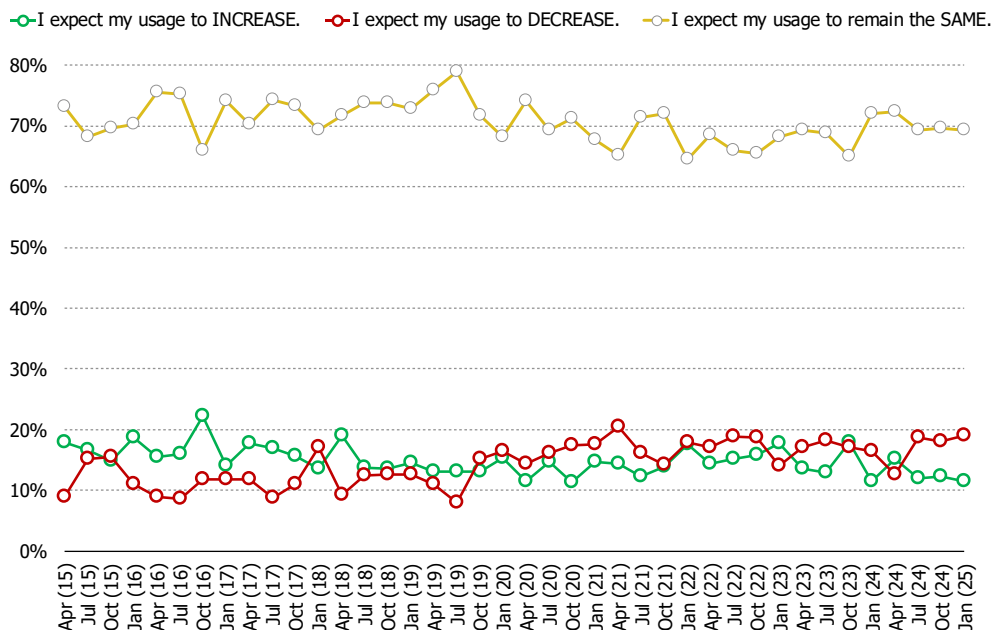
ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH



ETSY USERS – RECENT USAGE

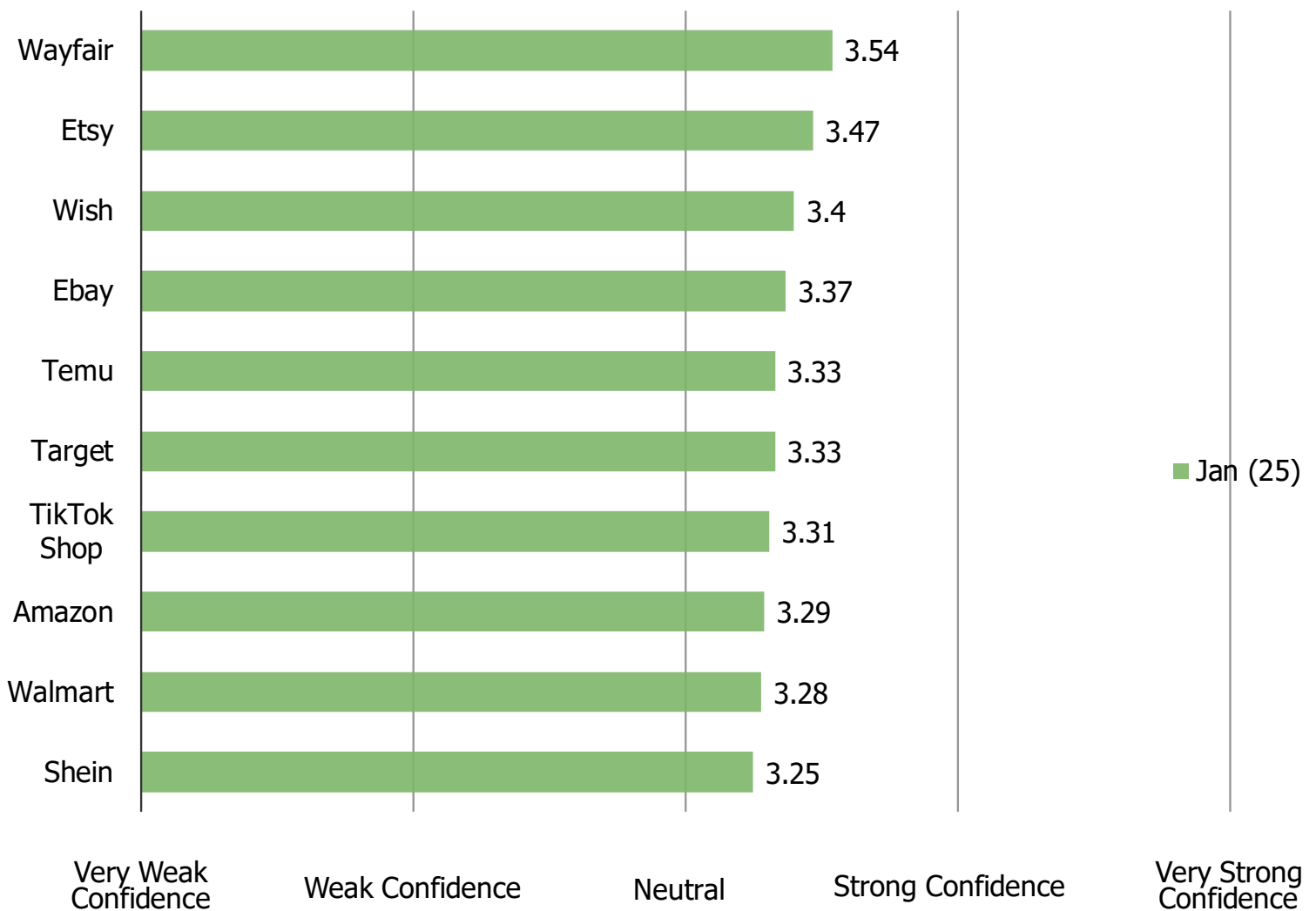


ETSY USERS – EXPECTED USAGE



CROSS-TAB ANALYSIS

CURRENT SPENDING CONFIDENCE OVERALL...

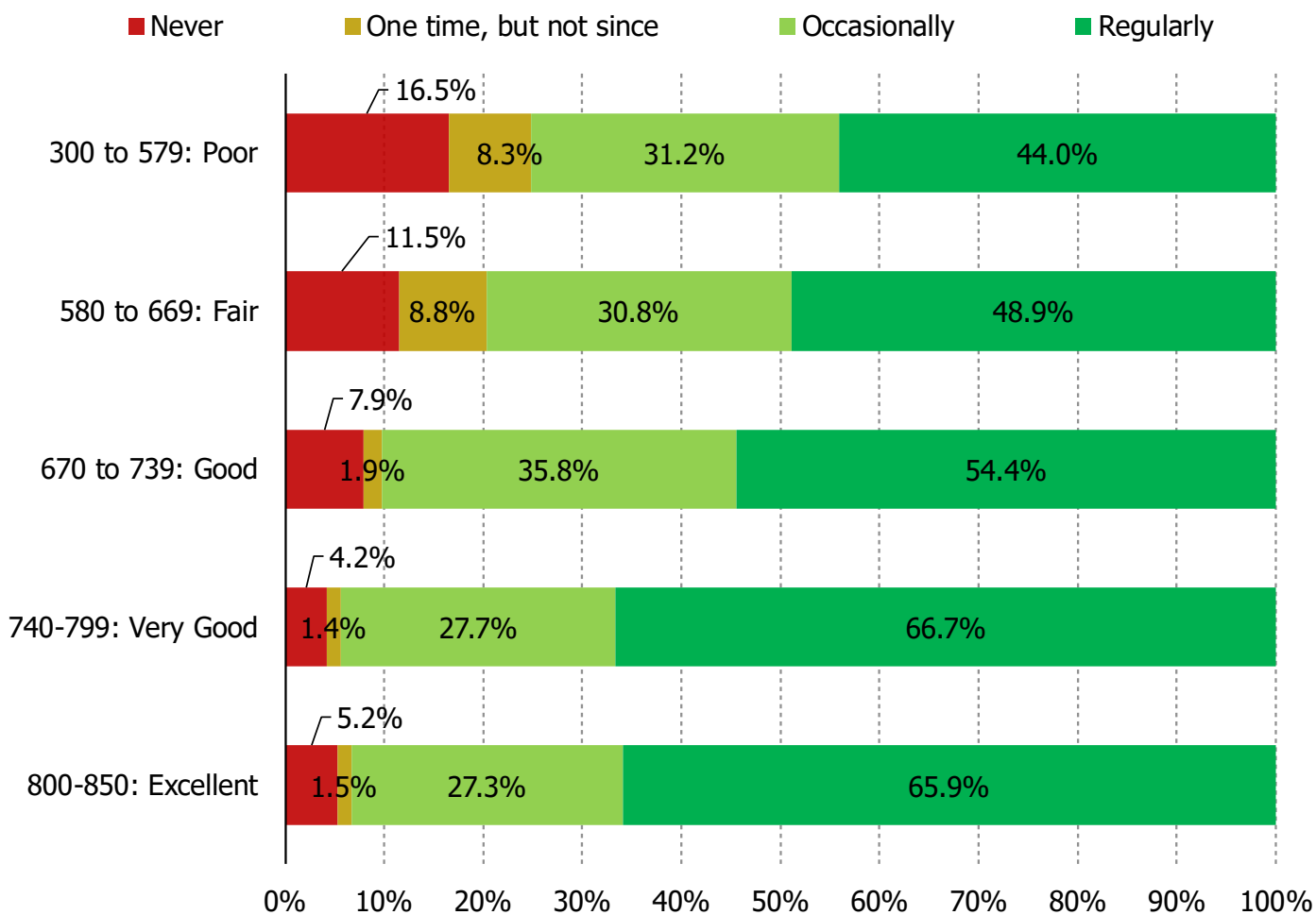


* This chart filters respondents who occasionally or regularly shop each of the above and shows how confident these respondents currently feel overall in spending money.

Experience with Amazon – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

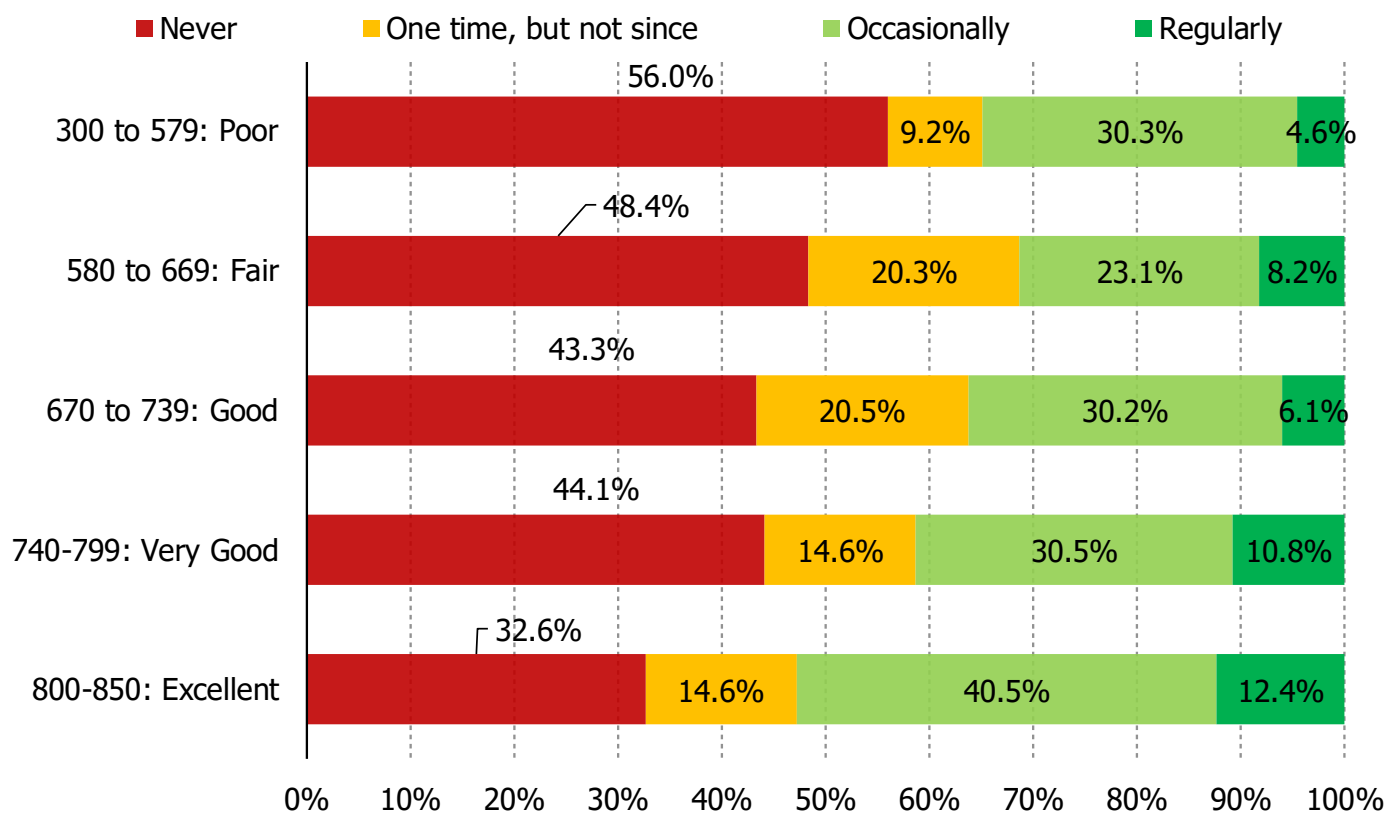


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with eBay – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

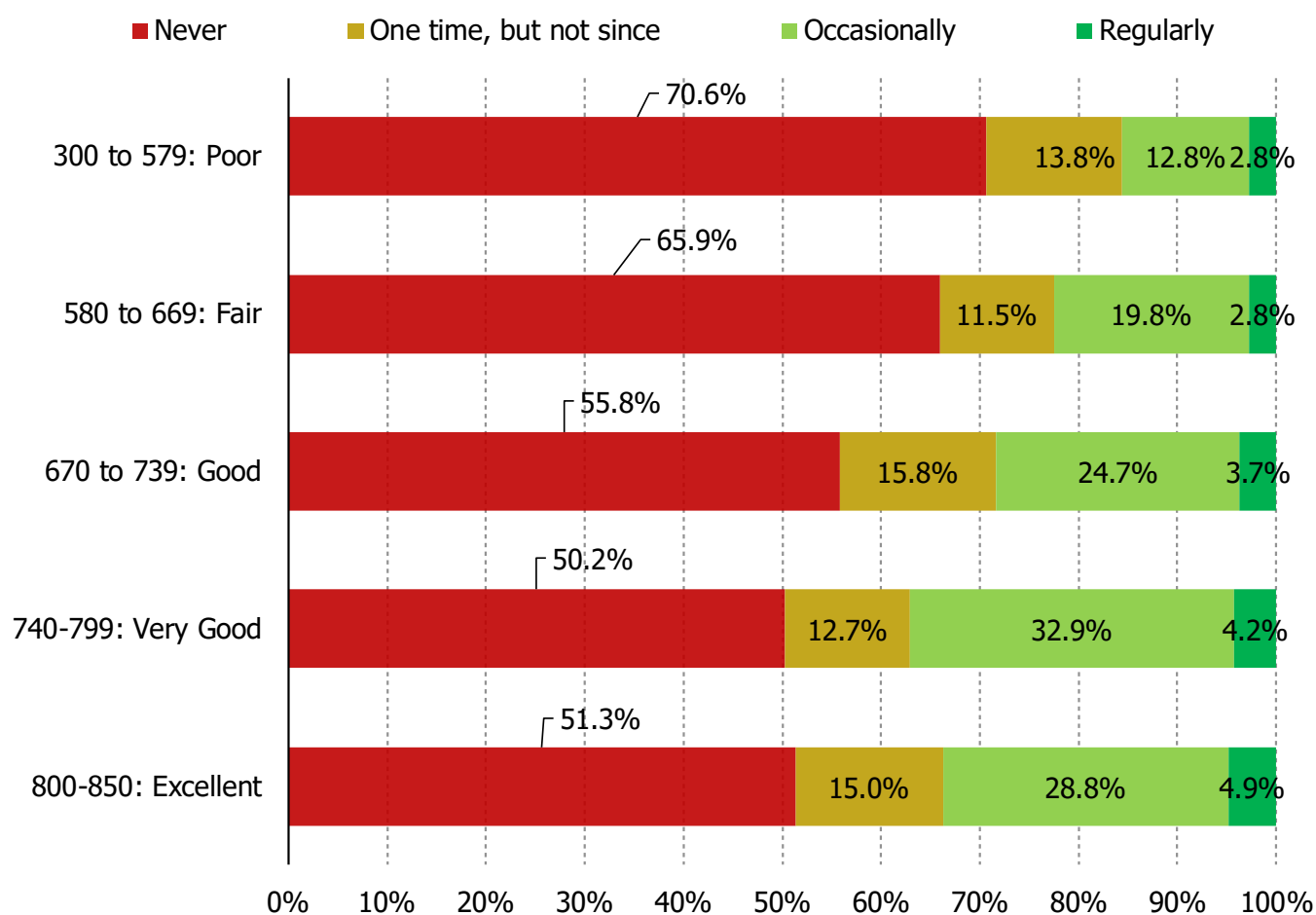


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Etsy – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

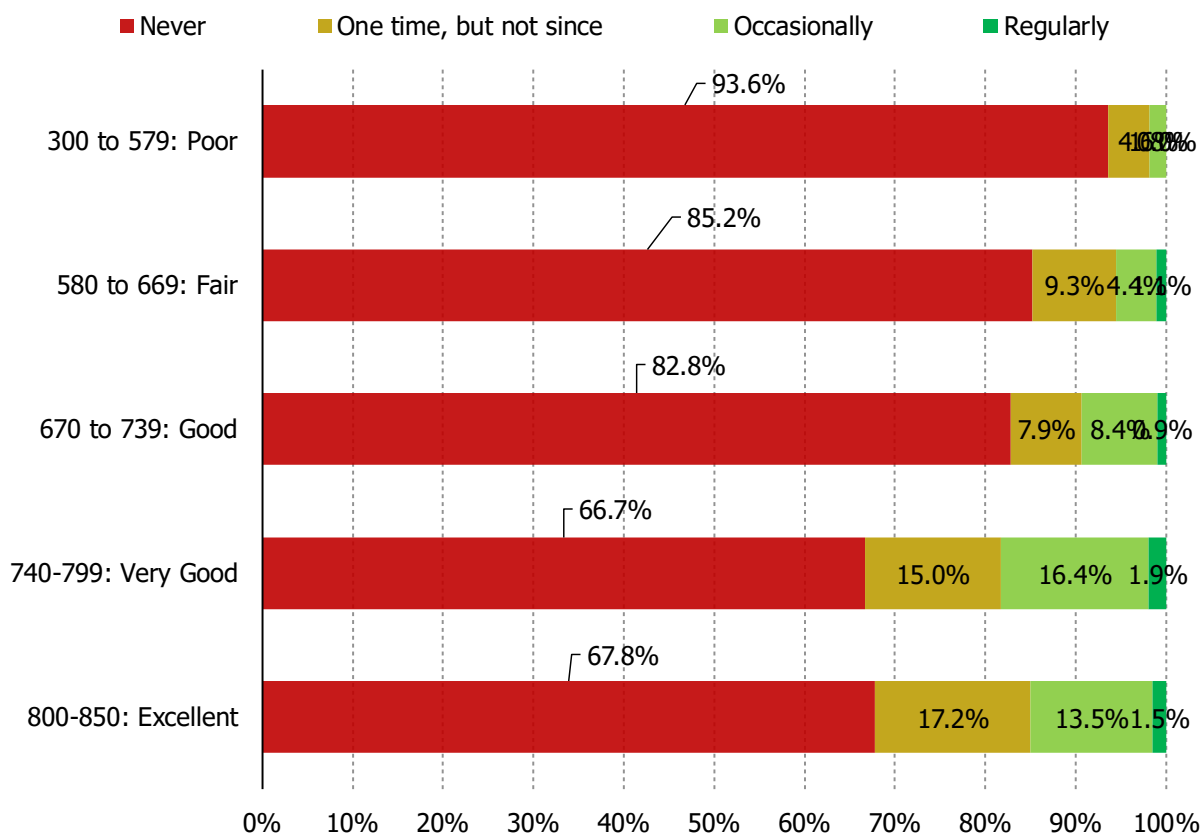


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Overstock – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

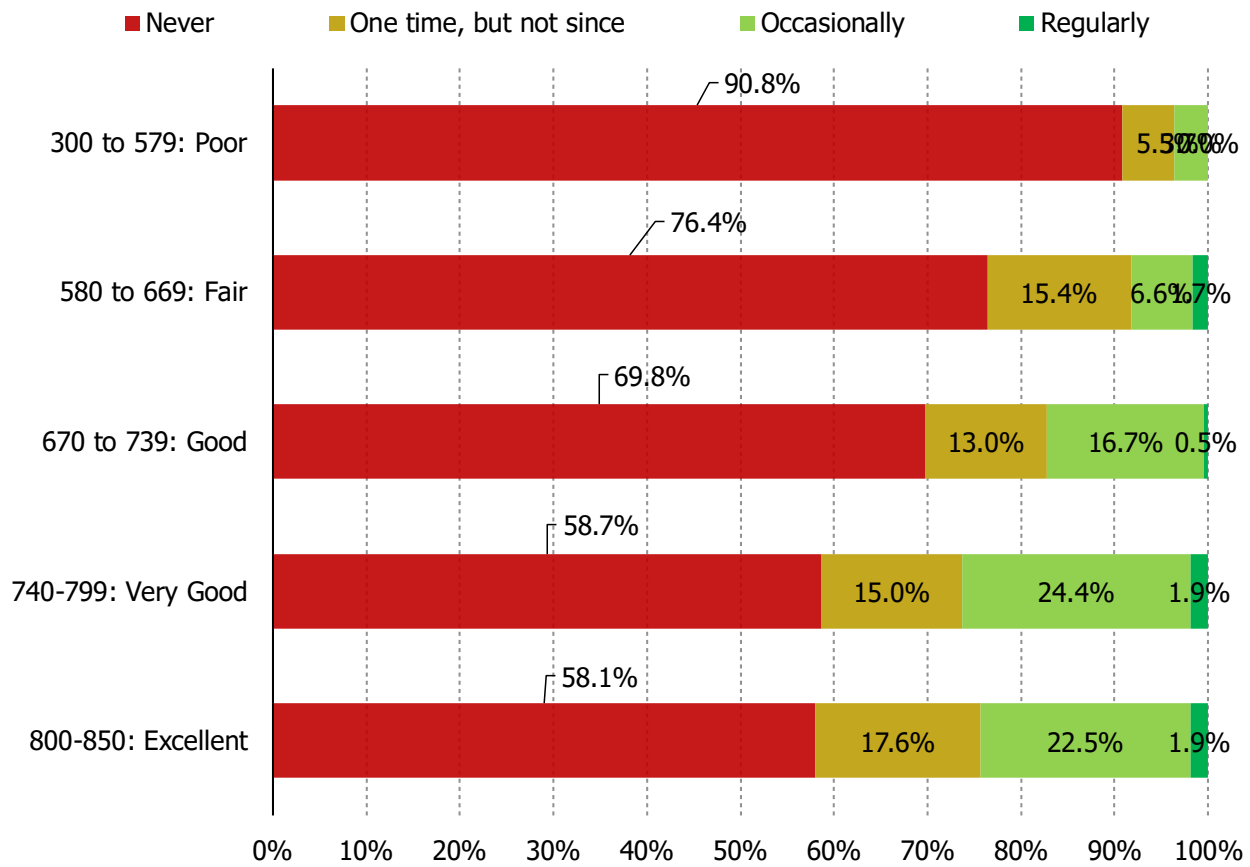


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wayfair – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

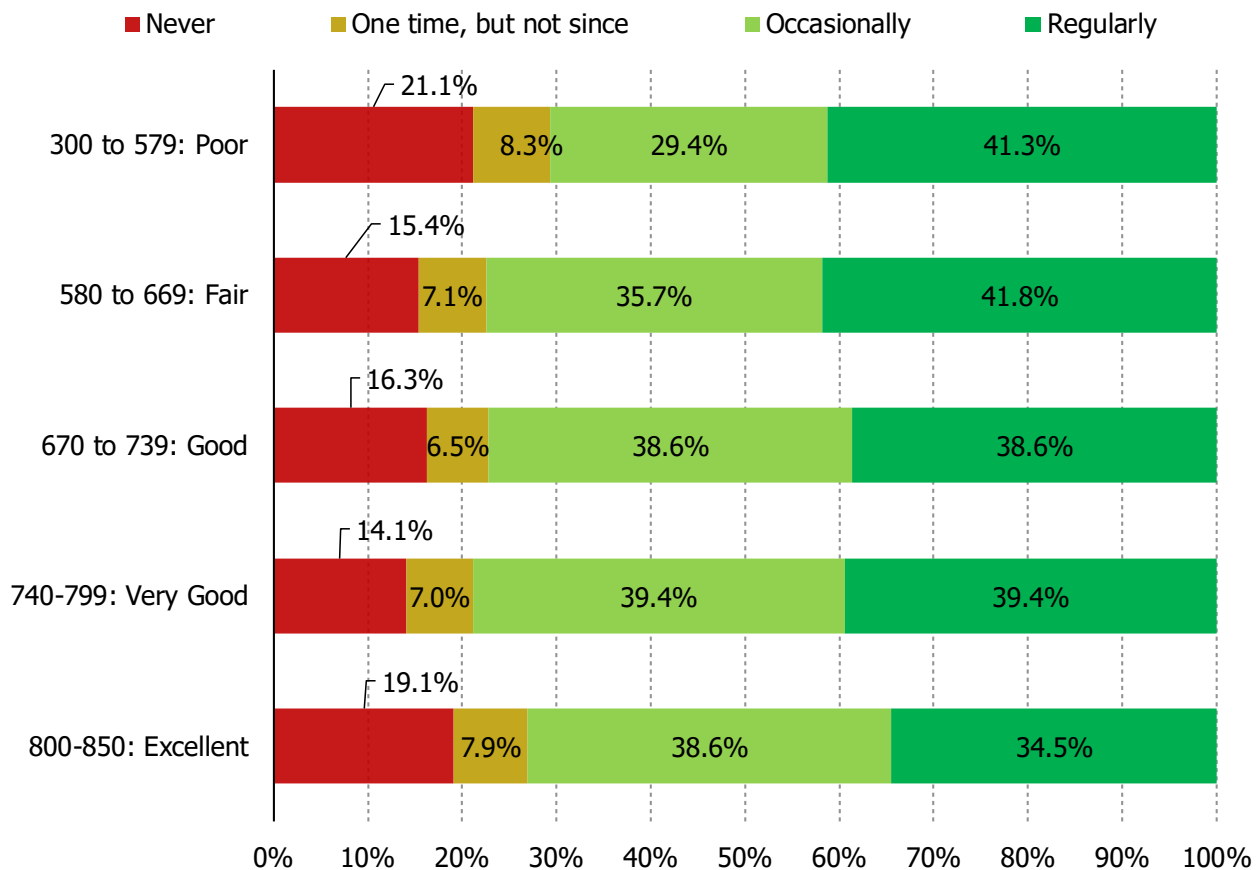


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wal-Mart – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

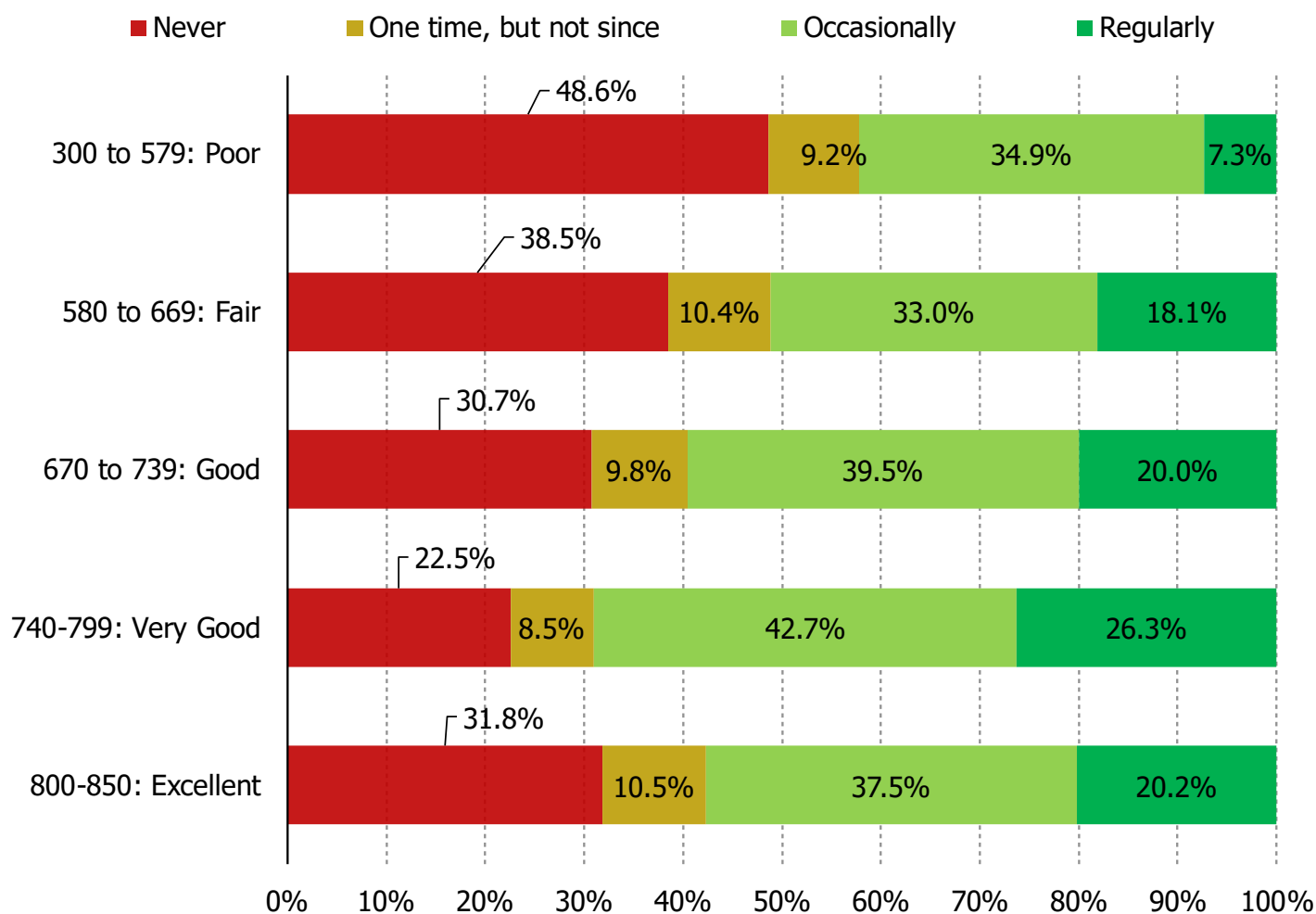


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Target – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

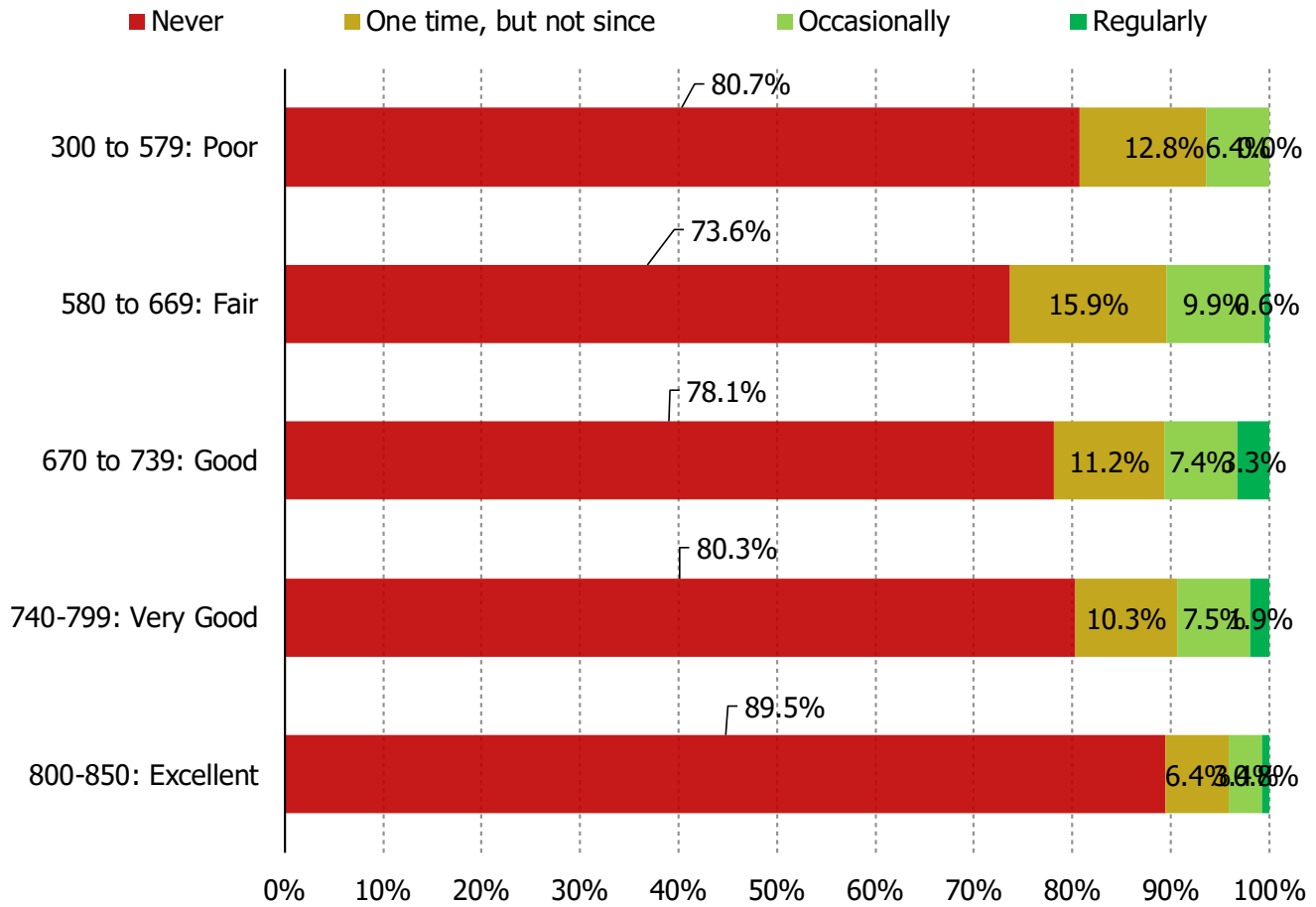


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wish.com – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

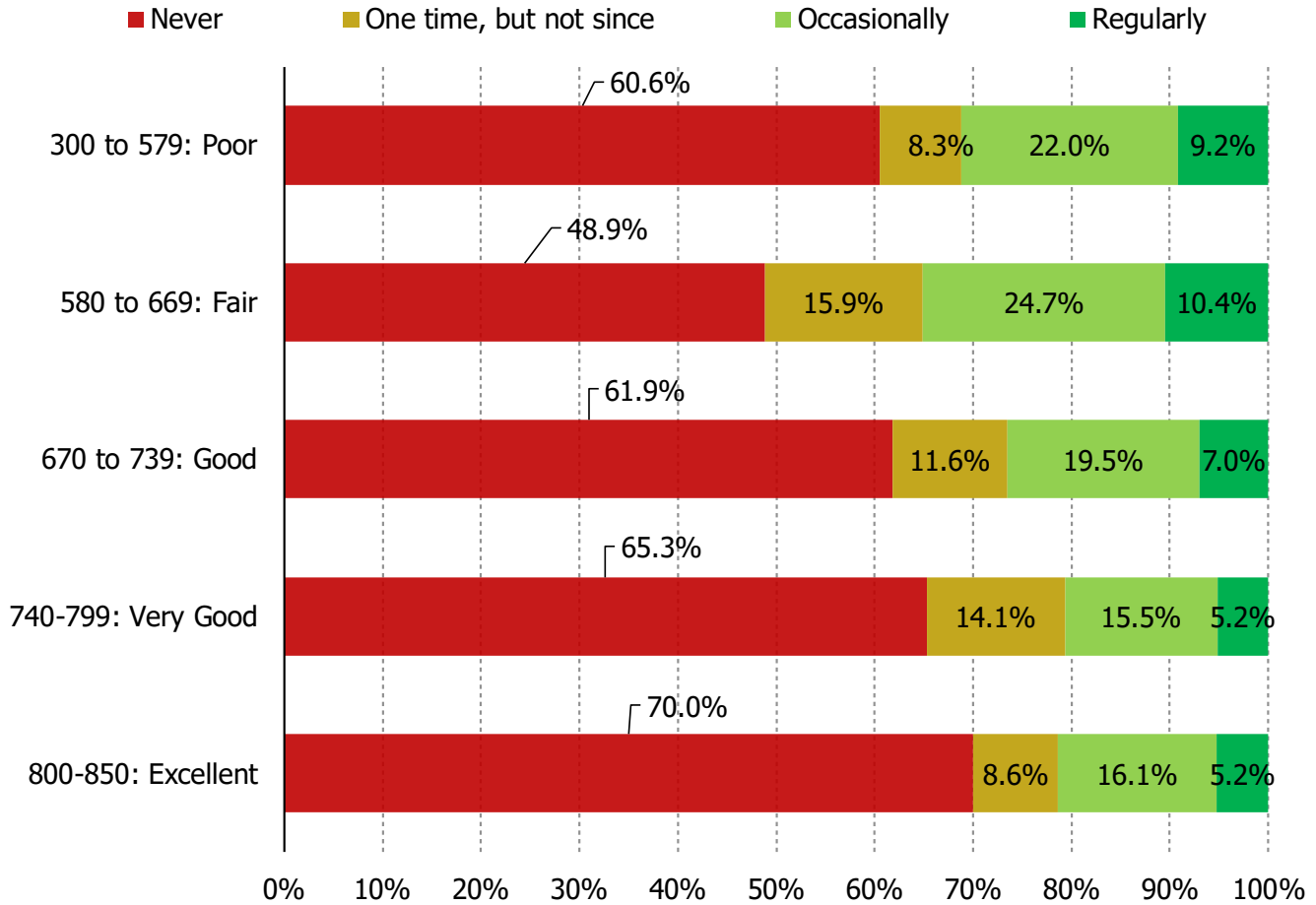


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Temu – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

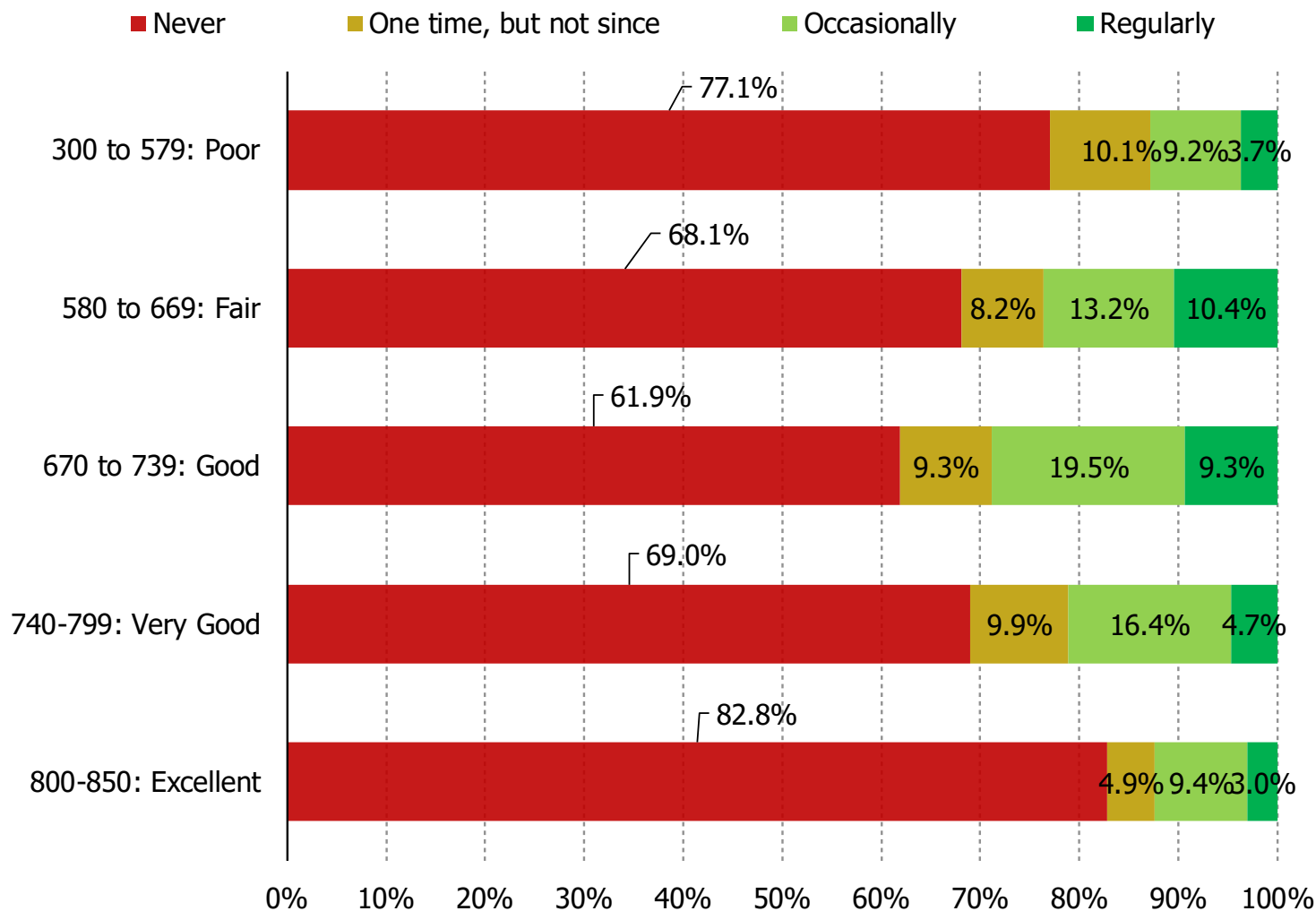


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Shein – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025

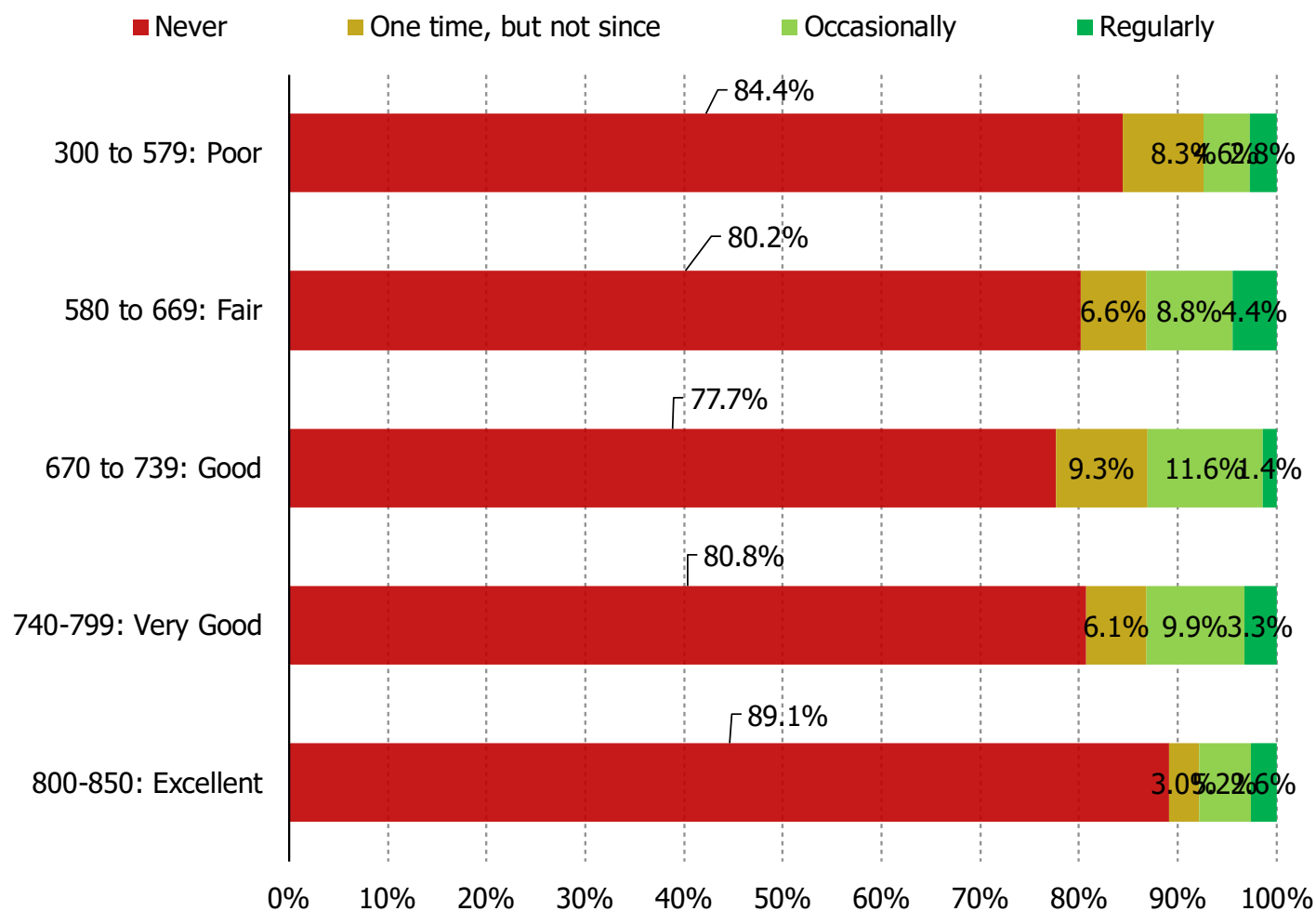


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with TikTok Shop – Purchased items...

BY SELF-REPORTED CREDIT SCORE

January 2025



*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.