

Bespoke Survey Research

April 2025



Online Retailers

Volume 49 | Quarterly Survey

1,000 US Consumers Balanced To Census

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

Key Takeaways:

Spending Outlook

- ❑ Consumer confidence in spending has declined further quarter-over-quarter and is now at the lowest level recorded in this ongoing tracker.

Wayfair Perception

- ❑ Among consumers who've browsed or considered buying from Wayfair, 51% believe it's riskier than buying from physical furniture stores.
- ❑ However, 43% see no added risk.
- ❑ When comparing Wayfair to other online retailers, 60% say there's no difference in risk. Wayfair is seen as riskier by a narrow %.
- ❑ A "Verified by Wayfair" badge would reduce perceived risk for many consumers.

Etsy's Gift Mode Gaining Traction

- ❑ Awareness and usage of Etsy's Gift Mode have increased consistently across waves.
- ❑ Purchase rates through the feature continue to rise.
- ❑ Consumers see Etsy as a differentiated source for personalized and unique items, especially in seasonal or gifting moments.

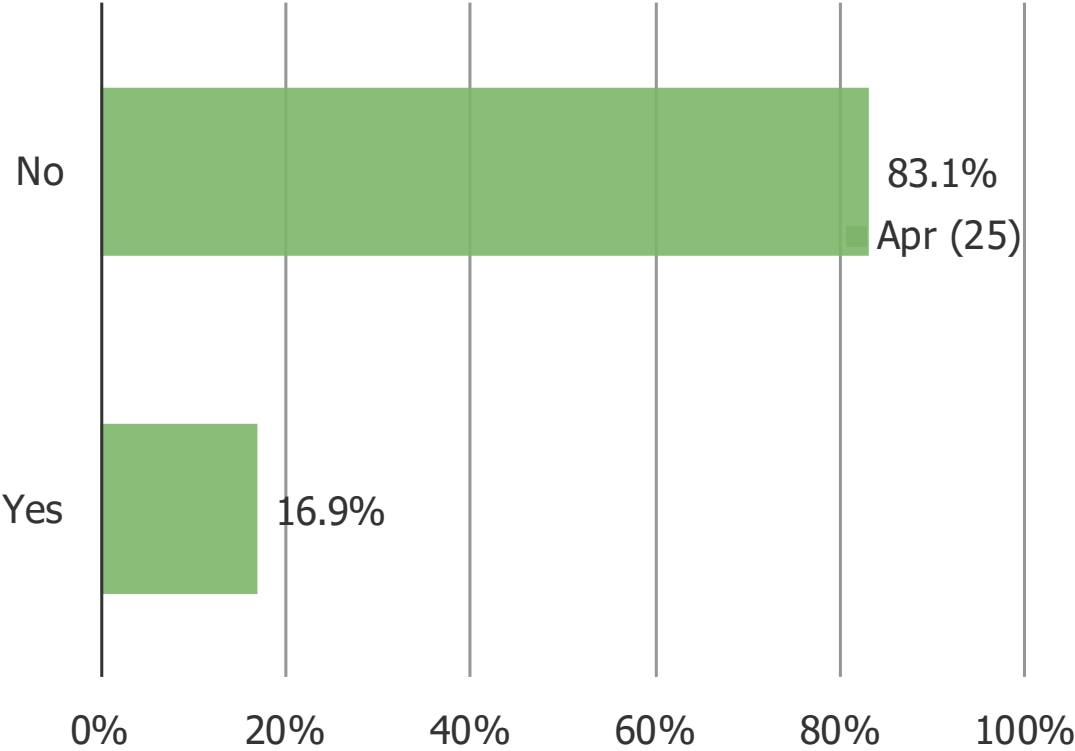
Price Comparison Trends

- ❑ More consumers report finding the same furniture items on both Amazon and Wayfair.

NEW AND RECENTLY ADDED QUESTIONS

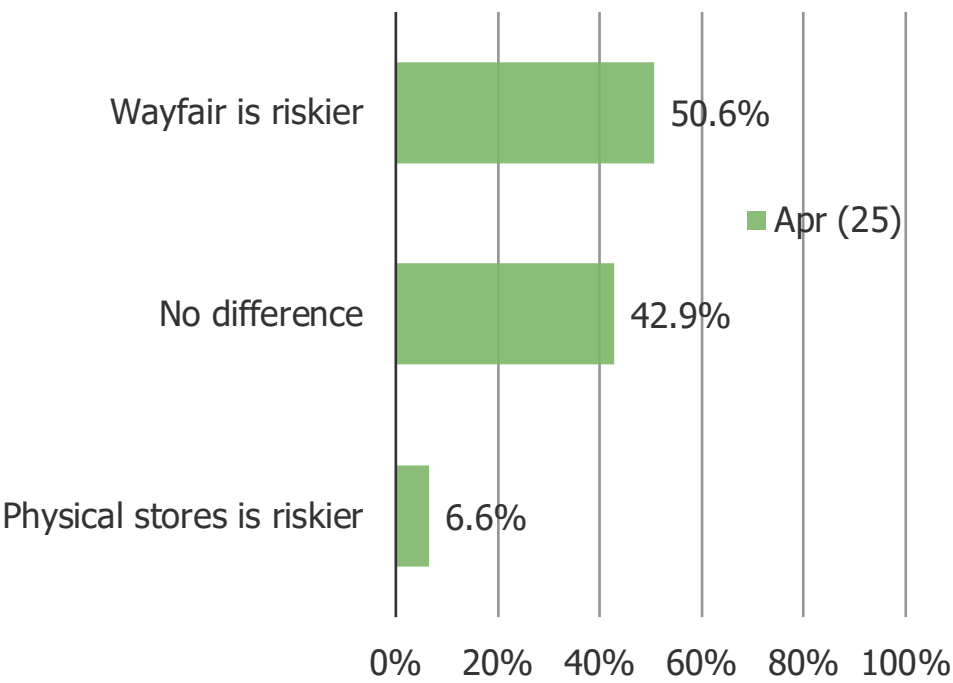
HAVE YOU BROWSED WAYFAIR OR CONSIDERED BUYING FURNITURE FROM WAYFAIR IN THE PAST YEAR OR SO?

Posed to all respondents.



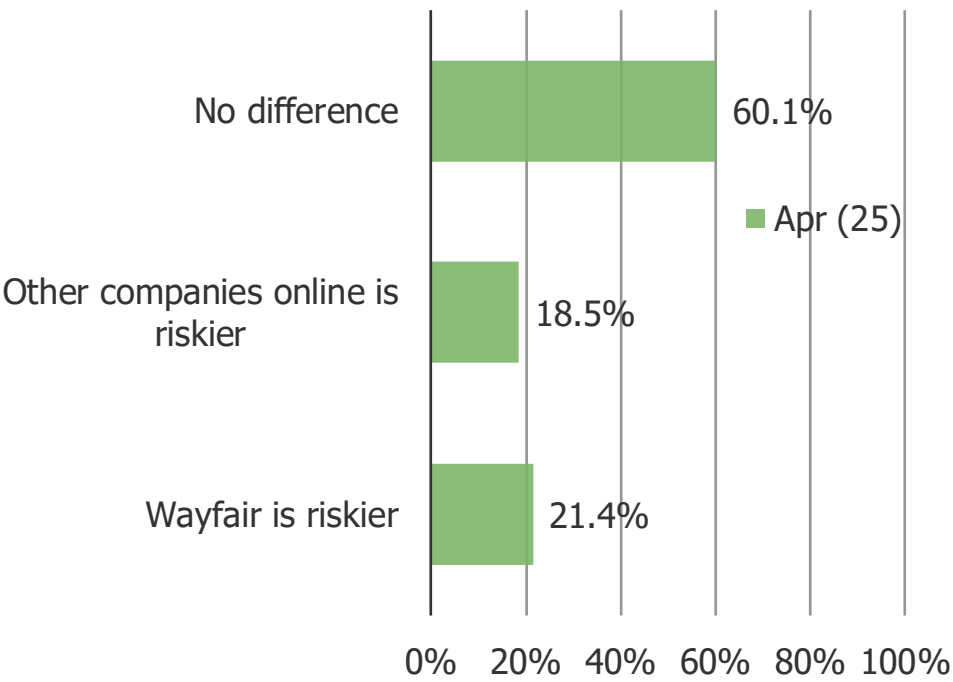
COMPARED TO BUYING FURNITURE IN PHYSICAL STORES, HOW RISKY DO YOU THINK IT IS TO BUY FROM WAYFAIR?(BY “RISKY,” WE MEAN THE CHANCE THAT YOU WON’T BE SATISFIED WITH THE PRODUCT — WHETHER DUE TO QUALITY, APPEARANCE, COMFORT, OR THE ABILITY TO RETURN OR EXCHANGE IT.)

Posed to all who have browsed or considered buying furniture from Wayfair in the past year or so. (N=168)



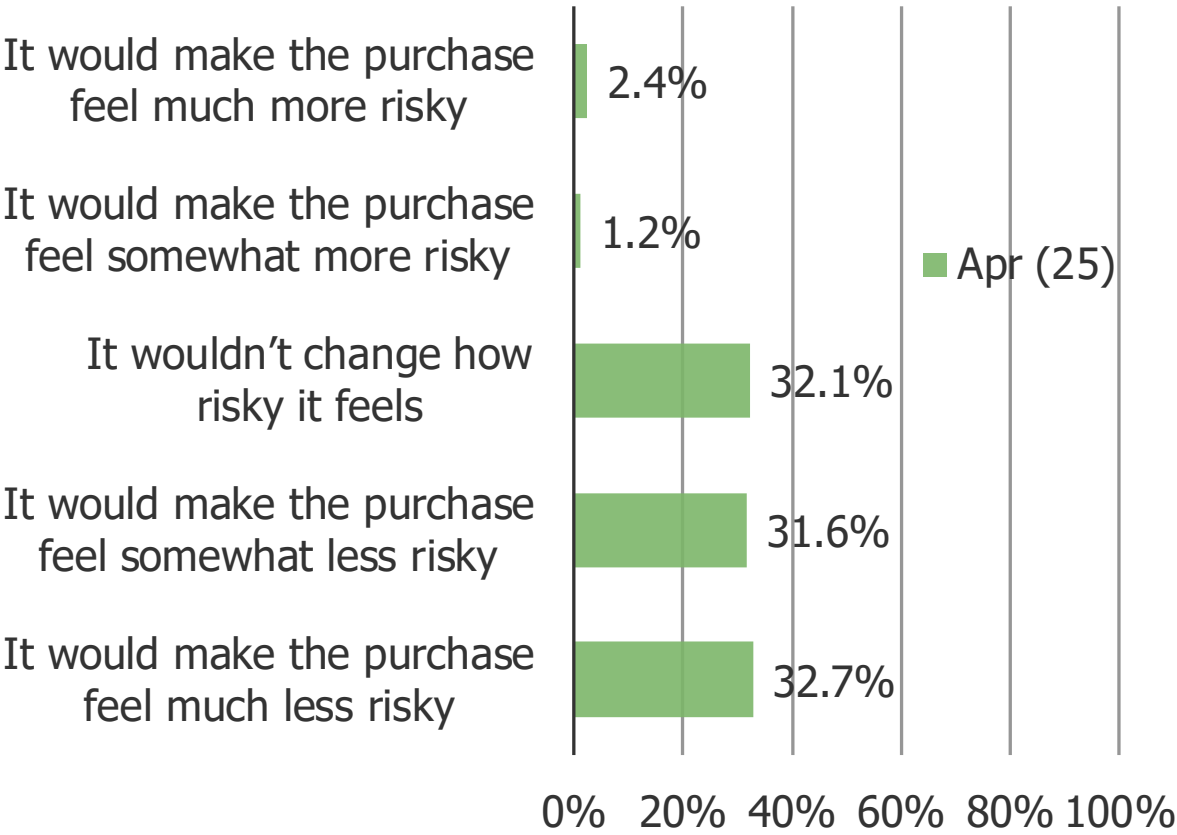
COMPARED TO BUYING FURNITURE FROM OTHER COMPANIES ONLINE, HOW RISKY DO YOU THINK IT IS TO BUY FROM WAYFAIR?(BY “RISKY,” WE MEAN THE CHANCE THAT YOU WON’T BE SATISFIED WITH THE PRODUCT — WHETHER DUE TO QUALITY, APPEARANCE, COMFORT, OR THE ABILITY TO RETURN OR EXCHANGE IT.)

Posed to all who have browsed or considered buying furniture from Wayfair in the past year or so. (N=168)



IF WAYFAIR ADDED A “VERIFIED BY WAYFAIR” STAMP TO CERTAIN FURNITURE ITEMS — INDICATING THAT THEIR TEAM HAS PERSONALLY TESTED THE PRODUCT FOR QUALITY, EASE OF ASSEMBLY, VALUE, AND OVERALL SATISFACTION — HOW WOULD THAT AFFECT HOW RISKY YOU THINK IT IS TO BUY THOSE PRODUCTS?

Posed to all who have browsed or considered buying furniture from Wayfair in the past year or so. (N=168)



THINKING ABOUT THE FURNITURE YOU HAVE GOTTEN FROM WAYFAIR, HOW WAS THE QUALITY?

Posed to all Wayfair customers.



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.

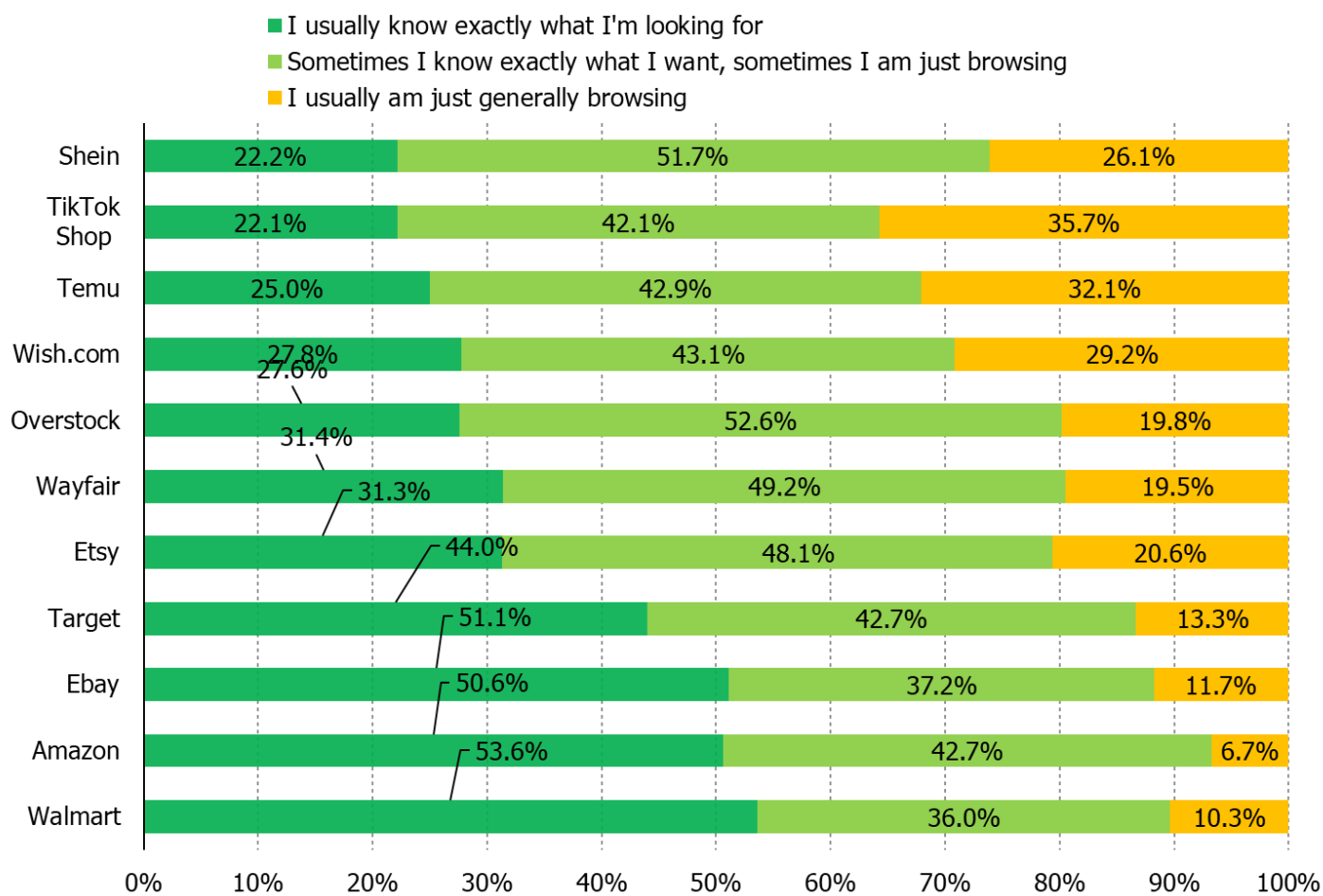
Posed to all Wayfair customers.



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

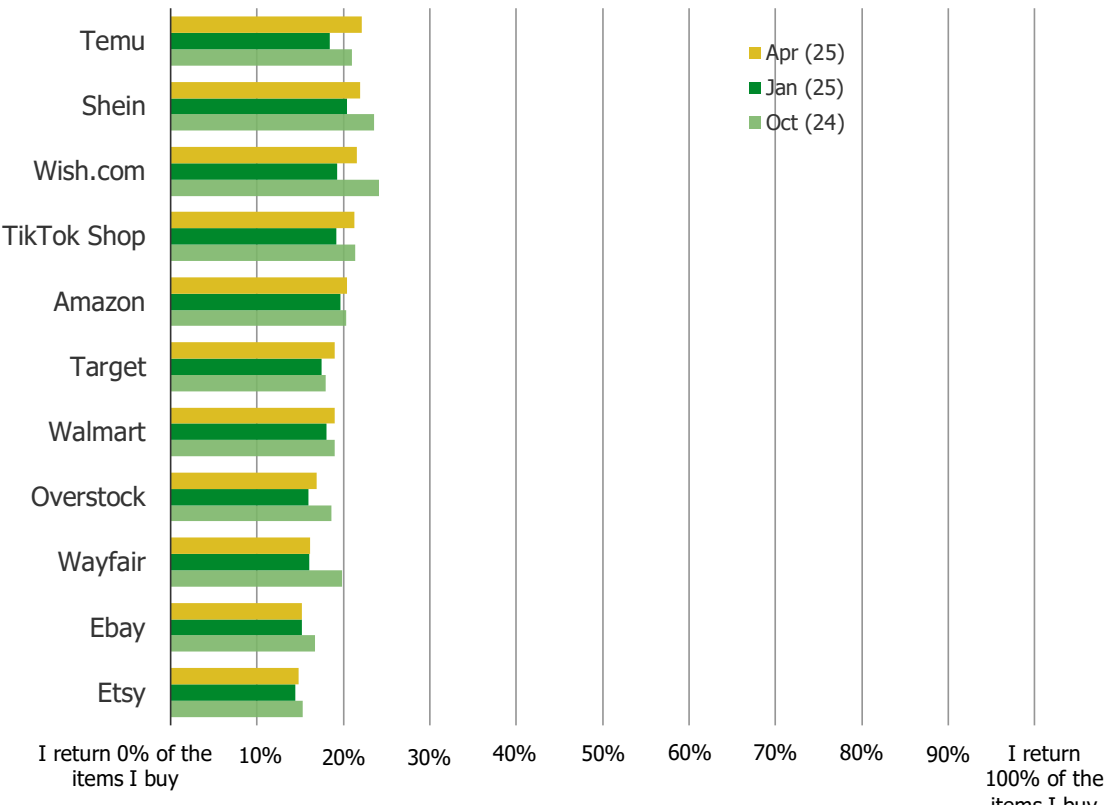
Posed to all respondents who shop/browse the below.

APRIL 2025



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

Posed to all respondents who shop the below.

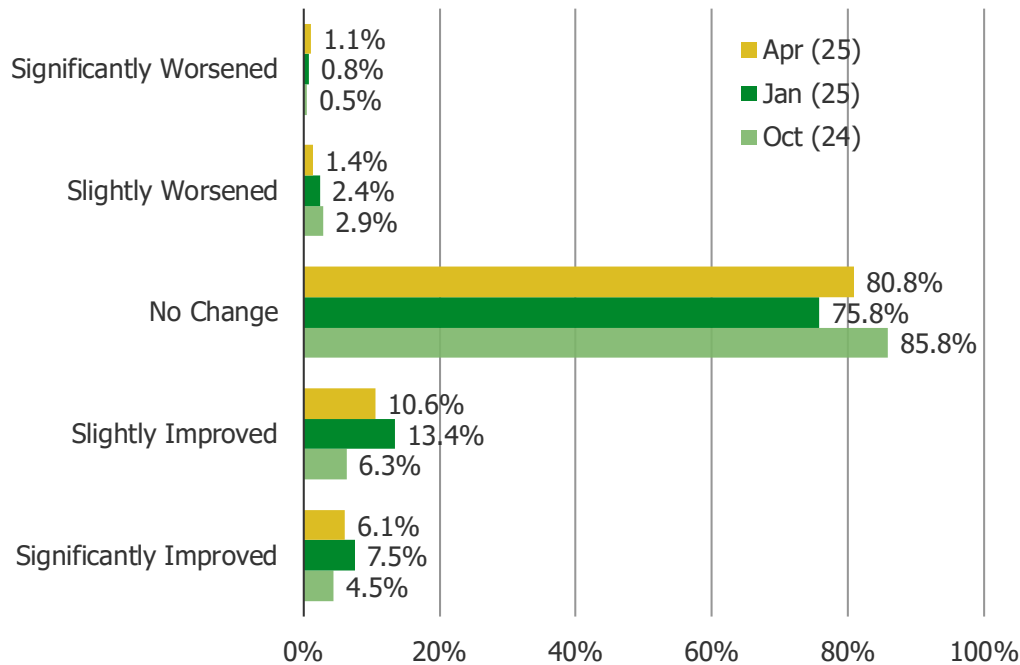


Weighted average above, full breakdown of responses below...

I return X% of the items I Buy	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	N=
Etsy	81.7%	9.5%	3.1%	0.4%	0.4%	2.7%	0.8%	0.4%	0.8%	0.4%	0.0%	262
Ebay	74.6%	14.7%	5.2%	1.3%	0.8%	2.0%	0.8%	0.3%	0.3%	0.3%	0.0%	401
Wayfair	71.9%	17.8%	3.8%	2.2%	0.0%	2.2%	0.0%	0.5%	1.1%	0.0%	0.5%	185
Overstock	72.4%	15.5%	3.5%	1.7%	1.7%	0.9%	0.9%	2.6%	0.9%	0.0%	0.0%	116
Walmart	60.1%	24.0%	6.2%	2.8%	1.8%	1.7%	0.6%	0.6%	0.7%	0.3%	1.4%	716
Target	61.4%	23.0%	5.8%	2.5%	1.5%	1.7%	1.0%	0.4%	0.6%	1.0%	1.2%	518
Amazon	47.4%	33.0%	9.3%	3.1%	1.7%	2.7%	0.6%	0.5%	0.7%	0.4%	0.7%	848
TikTok Shop	71.4%	7.1%	7.1%	2.1%	1.4%	2.9%	2.1%	0.7%	0.7%	1.4%	2.9%	140
Wish.com	68.1%	11.1%	2.8%	5.6%	2.8%	2.8%	1.4%	1.4%	0.0%	2.8%	1.4%	72
Shein	63.6%	13.6%	7.4%	3.4%	2.8%	2.3%	0.6%	1.7%	1.1%	0.6%	2.8%	176
Temu	61.9%	13.5%	7.1%	4.0%	3.6%	4.4%	1.6%	0.0%	1.2%	1.6%	1.2%	252

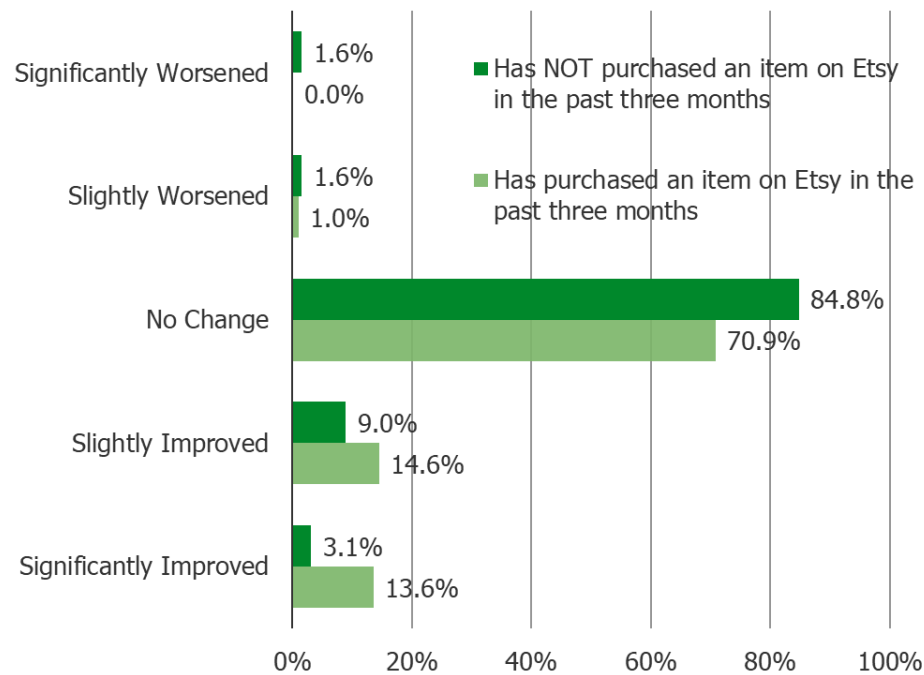
HAVE YOU NOTICED ANY CHANGES RECENTLY TO THE EXPERIENCE OF SEARCHING FOR ITEMS ON THE ETSY SITE OR APP?

Posed to all respondents who ever use or visit Etsy.



APRIL 2025

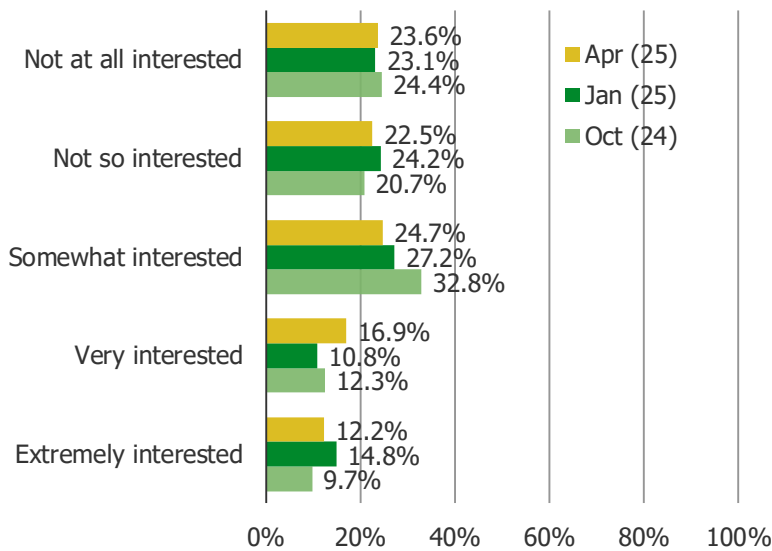
Cross-tabbing the above by if they have shopped Etsy in the past three months or not...



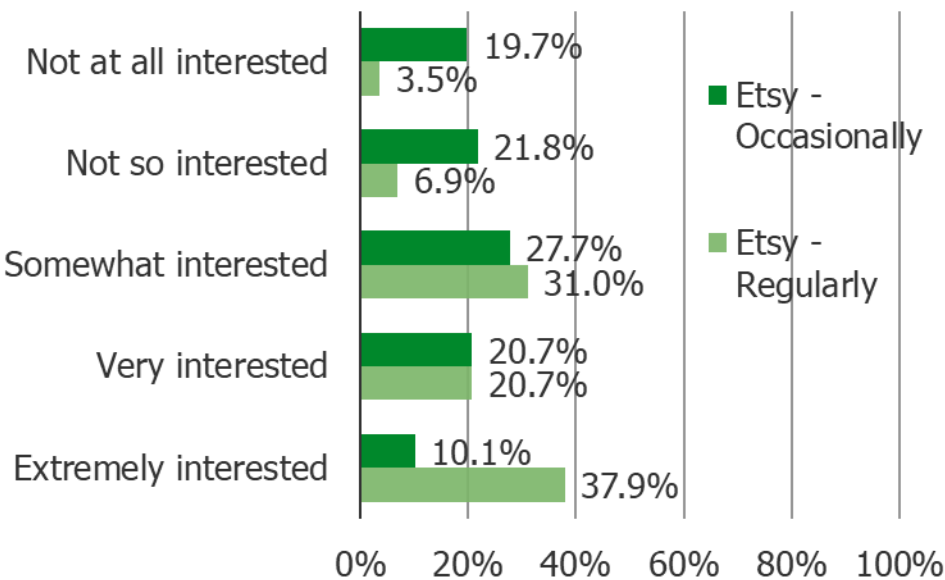
HOW MUCH INTEREST WOULD YOU HAVE IN JOINING AN ETSY INSIDER MEMBERSHIP PROGRAM?

- 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.

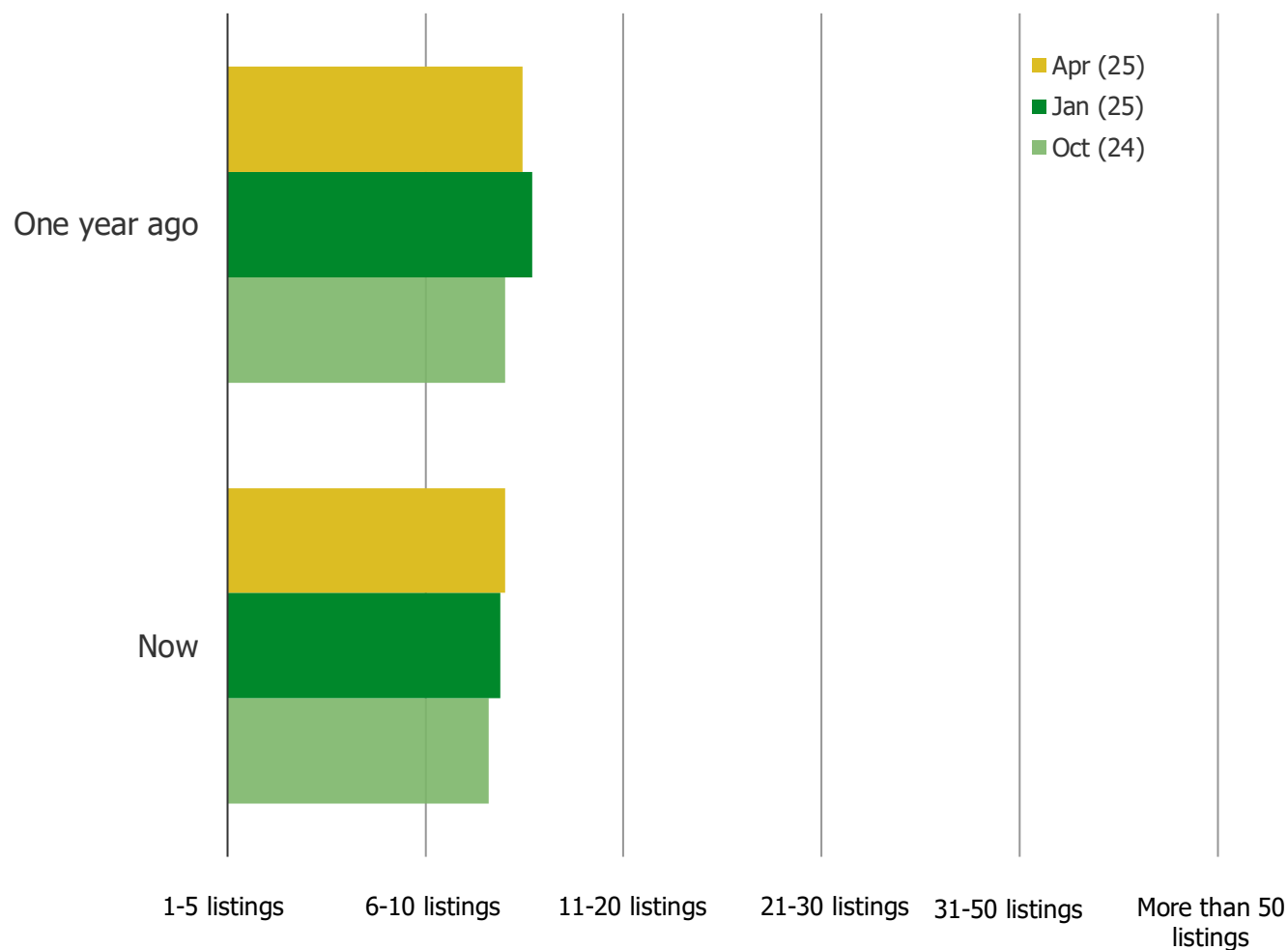


APRIL 2025 - Cross tabbing the data above...



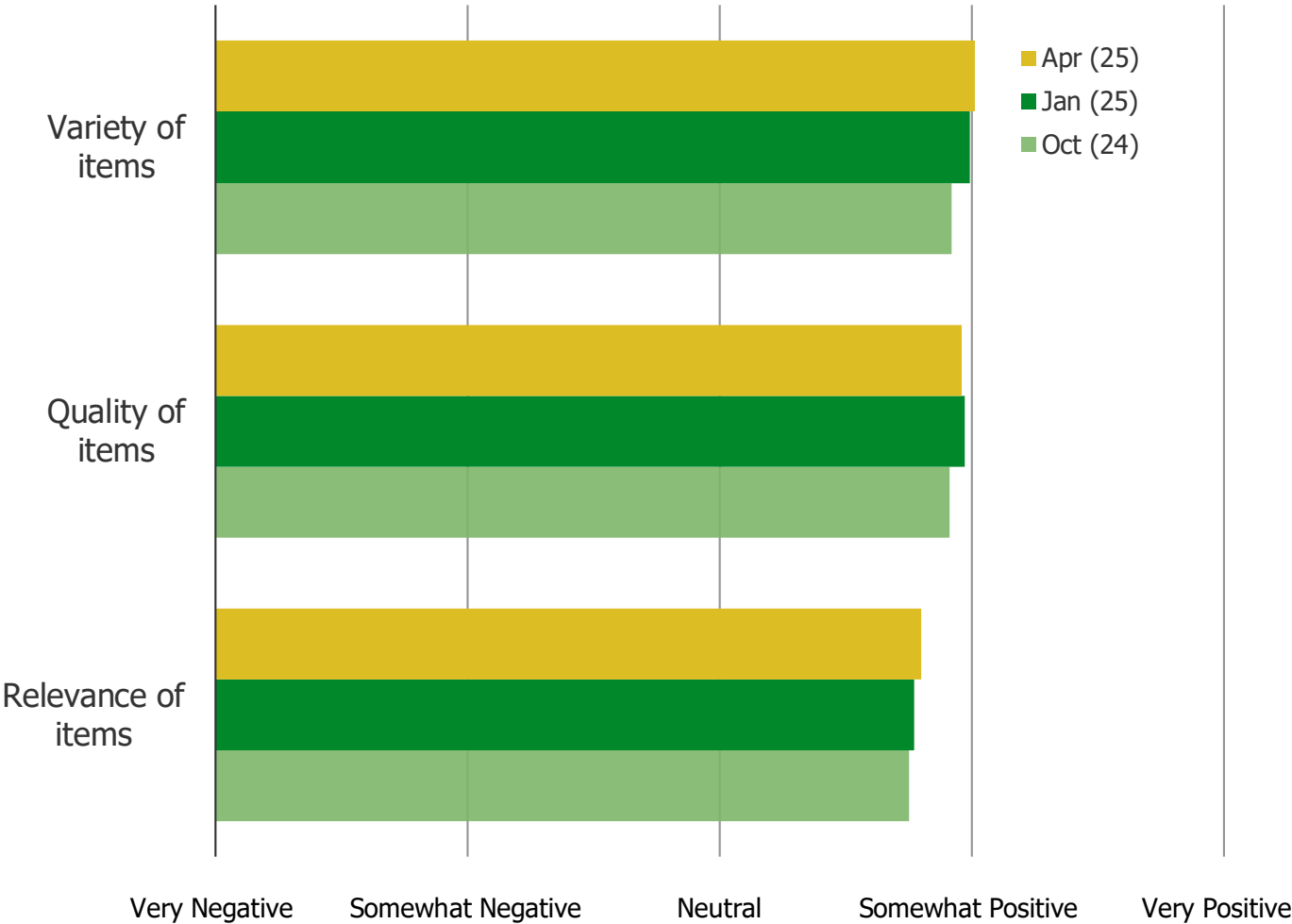
HOW MANY LISTINGS WOULD YOU ESTIMATE YOU NEED TO LOOK THROUGH WHEN YOU SEARCH FOR ITEMS ON ETSY BEFORE YOU FIND WHAT YOU WERE LOOKING FOR?

Posed to all respondents who ever use or visit Etsy.



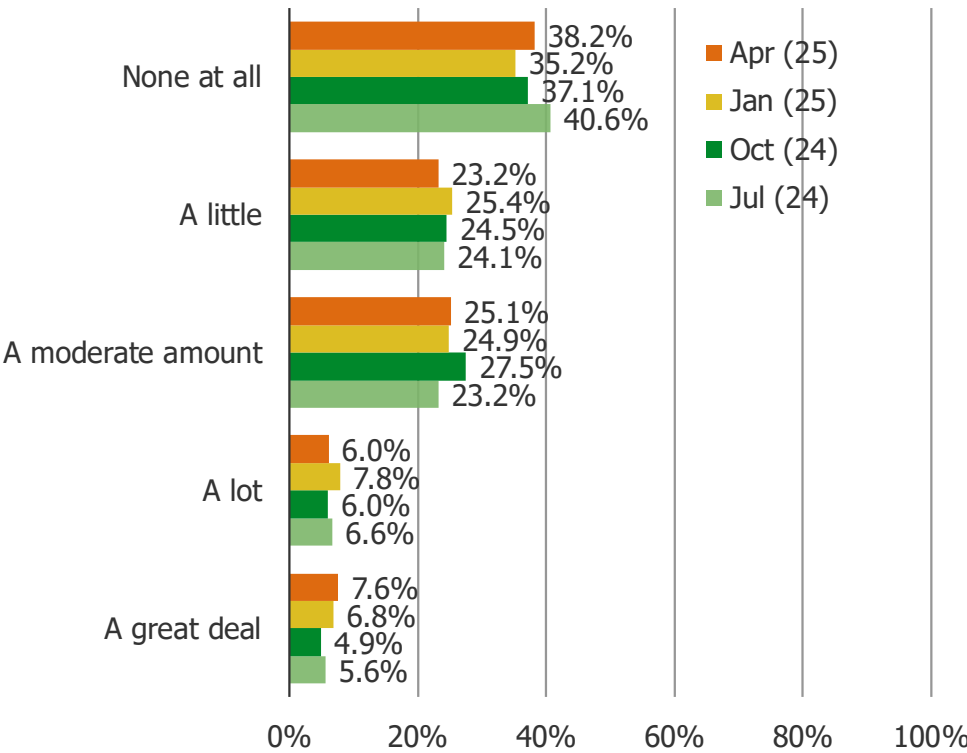
WHAT IS YOUR OPINION OF THE FOLLOWING WHEN SEARCHING FOR ITEMS ON ETSY?

Posed to all respondents who ever use or visit Etsy.

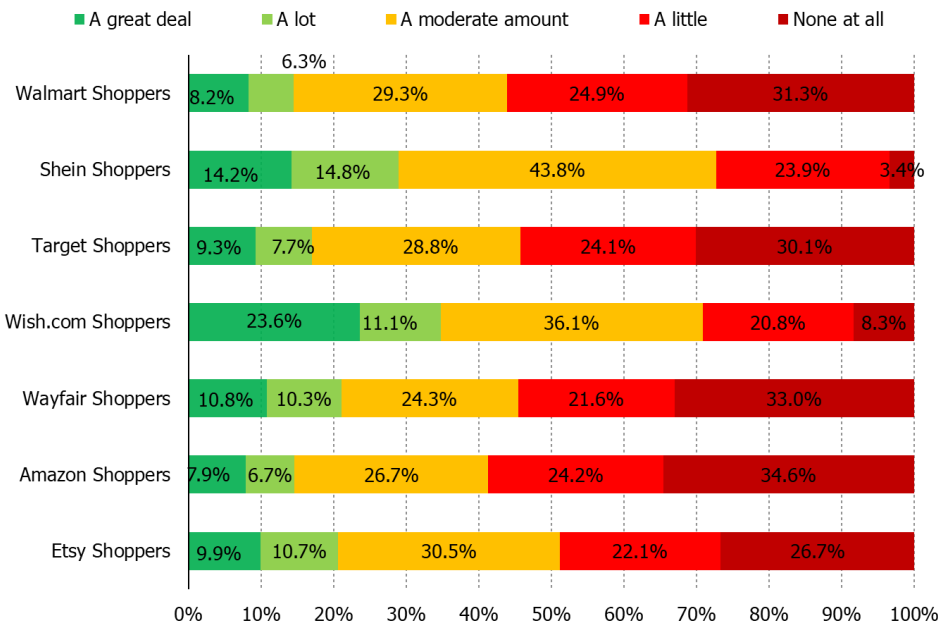


HOW MUCH USE DO YOU HAVE IN GENERAL FOR WEBSITES OR APPS THAT SELL CHEAP GOODS AND SHIP FROM WAREHOUSES IN CHINA DIRECTLY TO YOU IN THE US?

Posed to all respondents

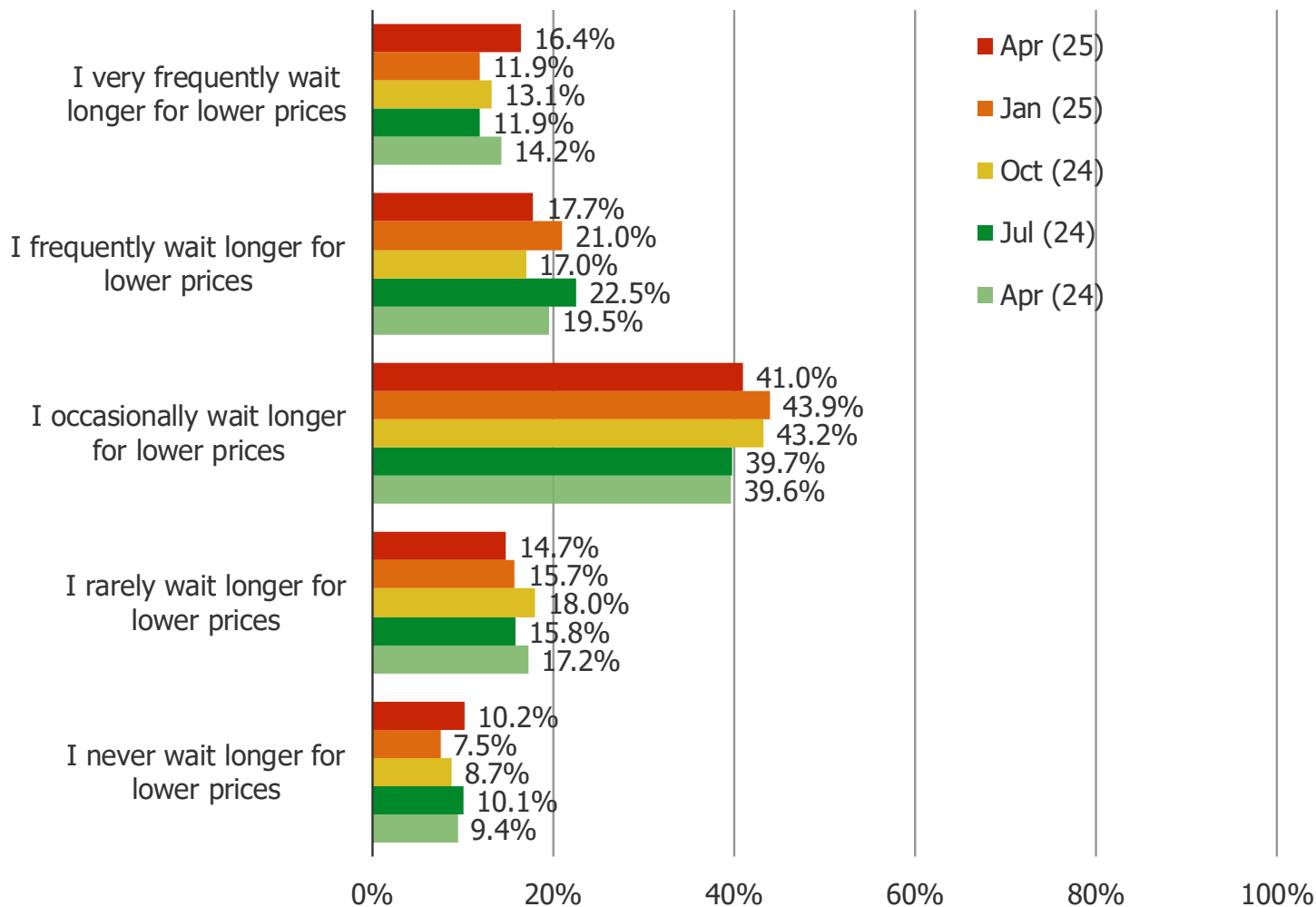


Cross-tabbing the above chart...



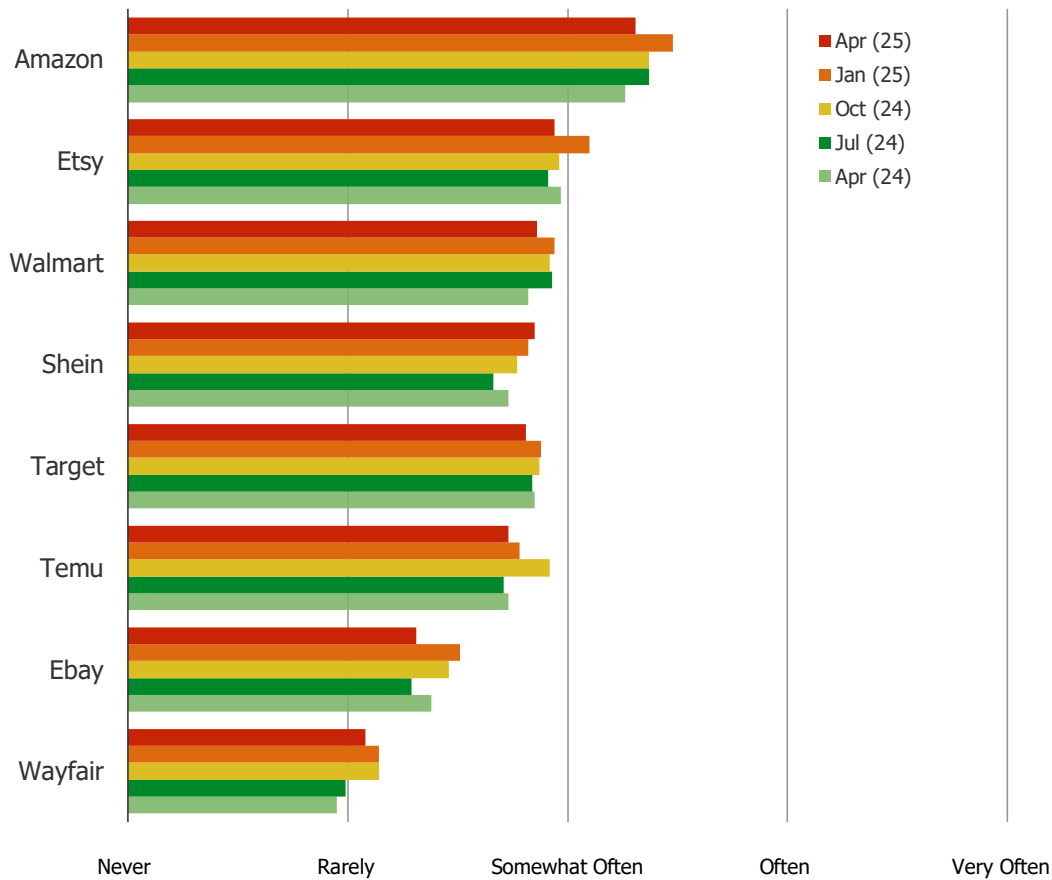
WHEN YOU SHOP ONLINE, HOW DO YOU THINK ABOUT THE TRADEOFF BETWEEN PRICE AND DELIVERY SPEED?

Posed to all respondents.



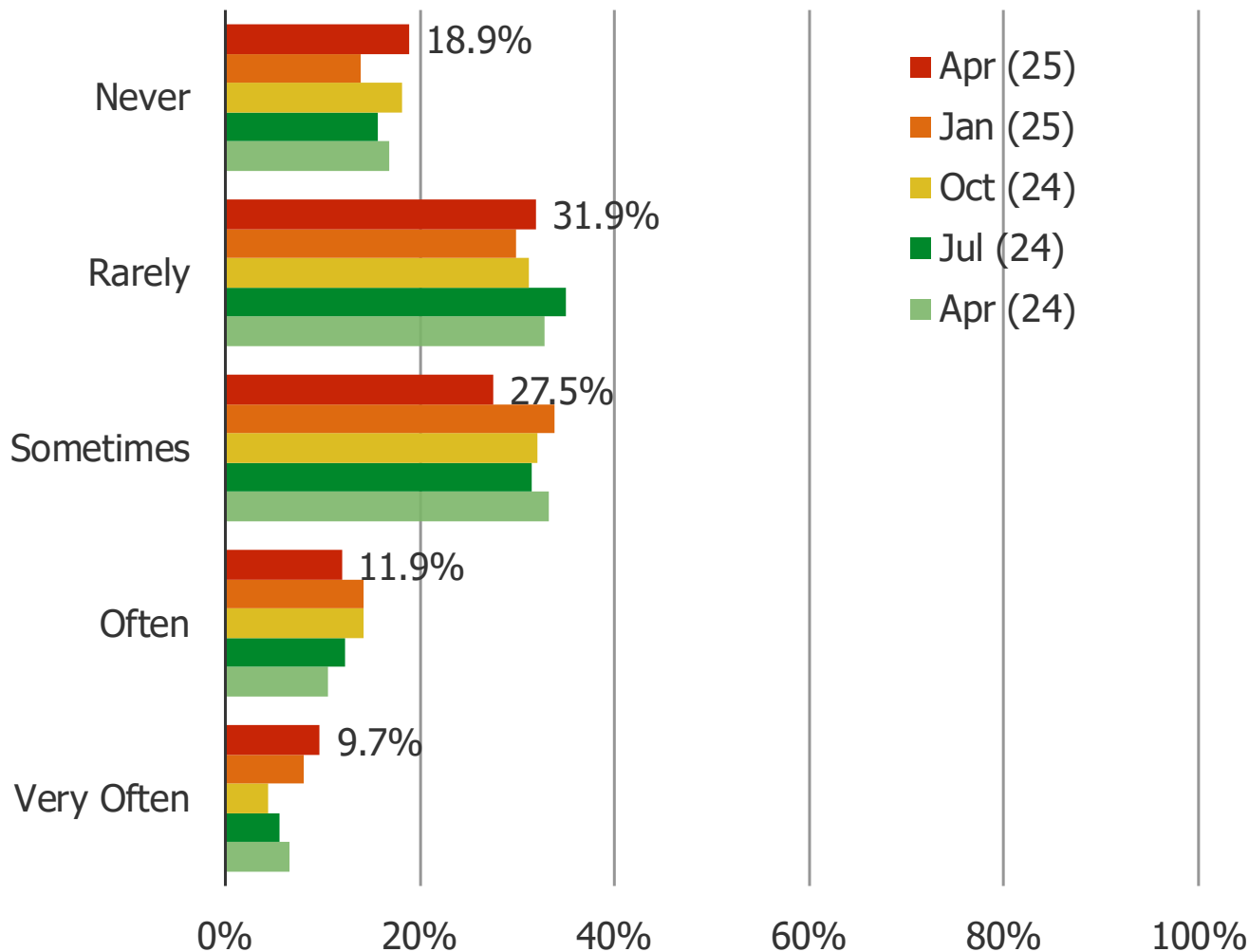
HOW OFTEN DO YOU BUY GIFTS FOR OTHERS THROUGH THIS PLATFORM?

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



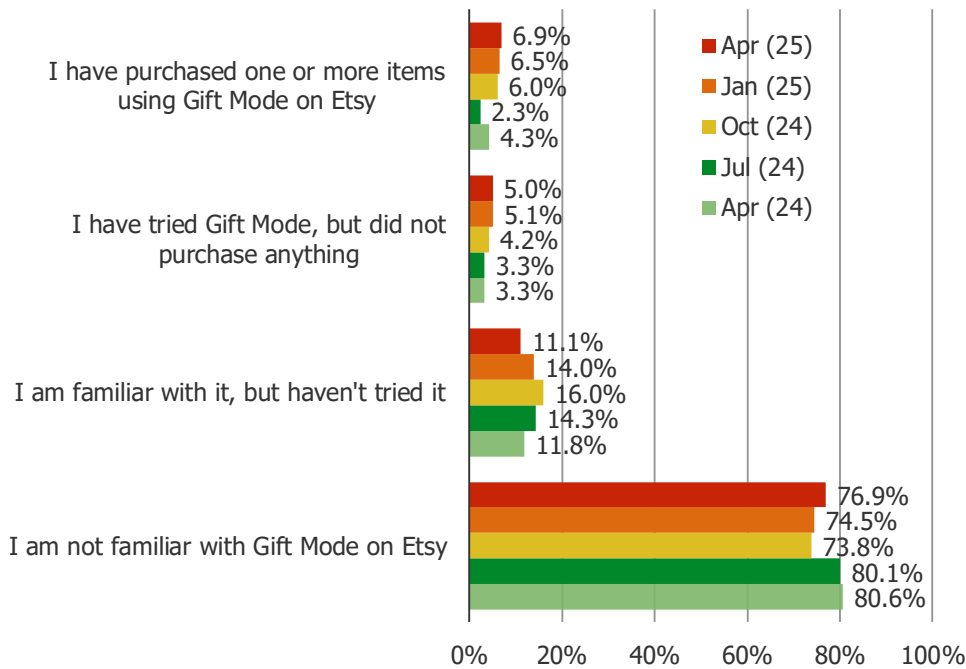
HOW OFTEN DO YOU USE ETSY TO BUY GIFTS FOR OTHERS?

Posed to all respondents who have shopped Etsy.

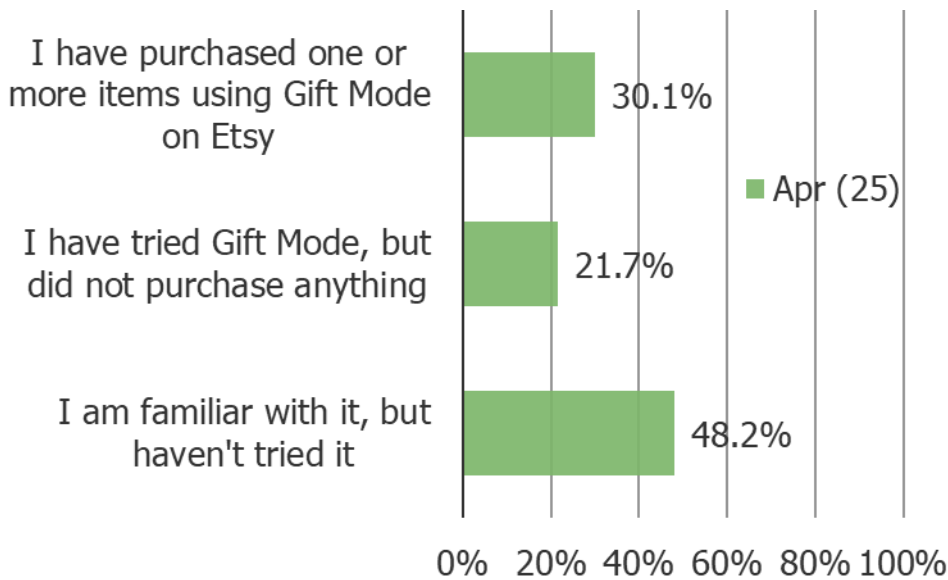


HAVE YOU TRIED GIFT MODE ON ETSY?

Posed to all respondents who have shopped Etsy.

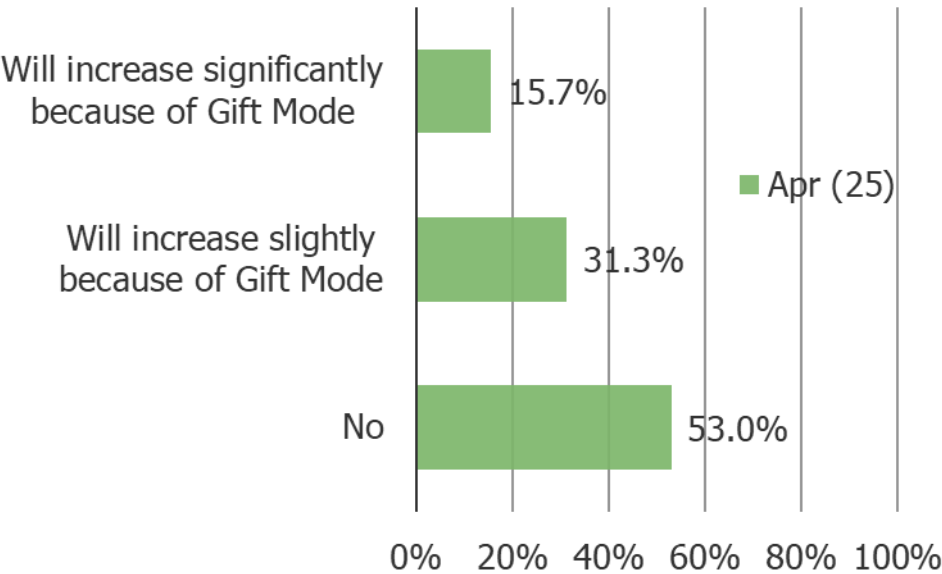


Posed to all respondents who have shopped Etsy (factoring out people who aren't aware of Gift Mode on Etsy).



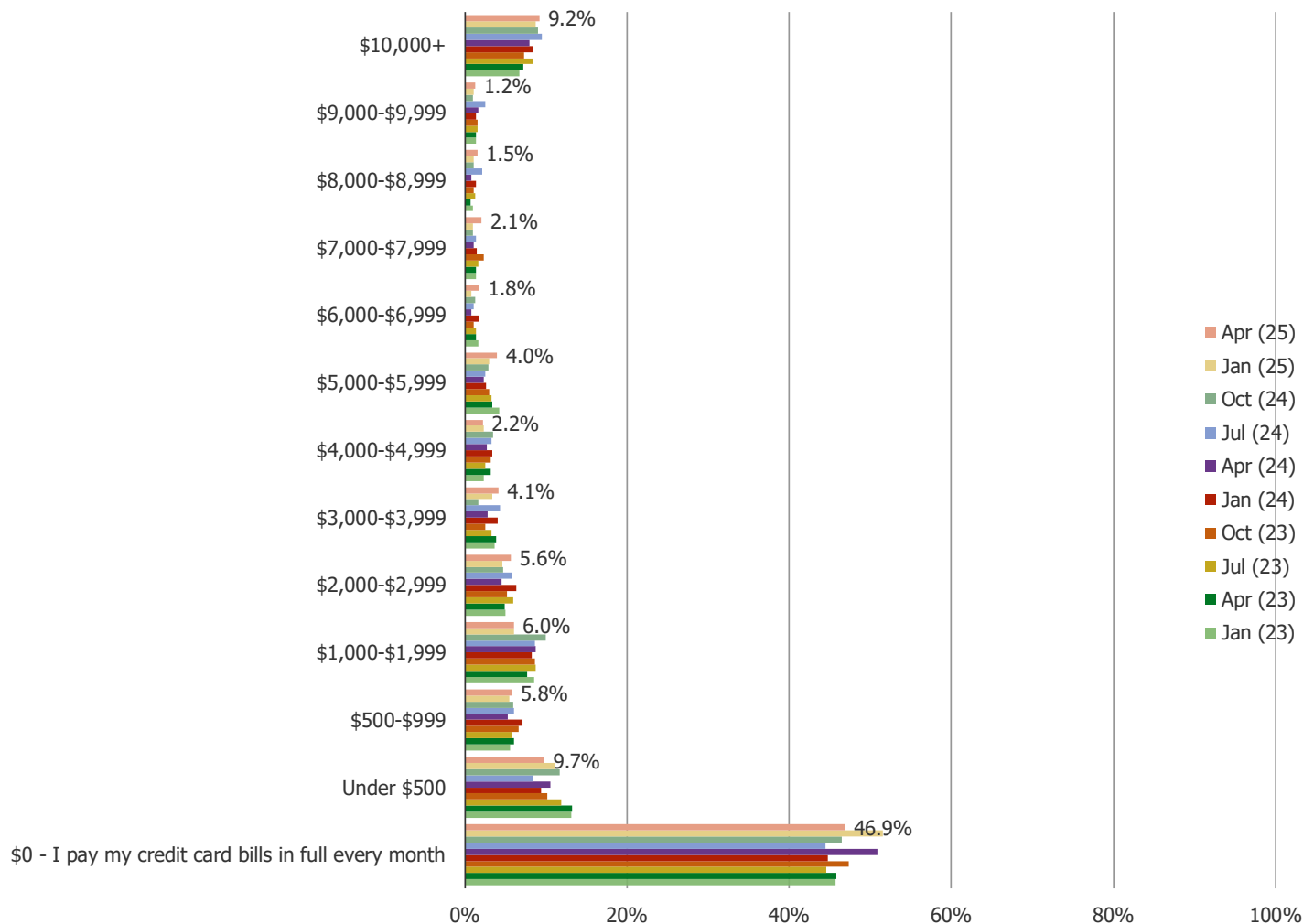
DO YOU THINK YOU WILL INCREASE THE SHARE OF YOUR GIFT GIVING THAT YOU BUY THROUGH ETSY BECAUSE OF THE GIFT MODE FEATURE?

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



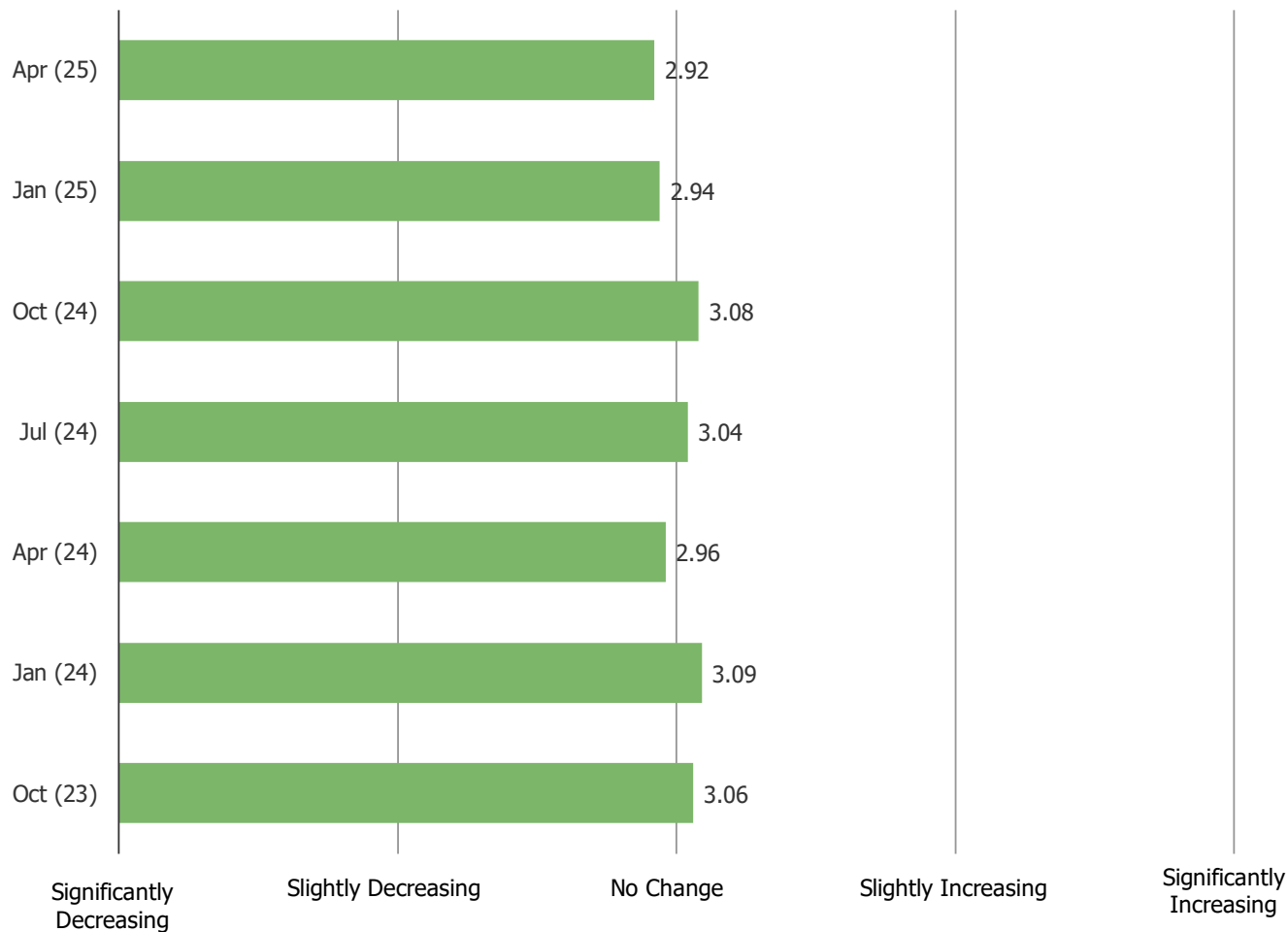
HOW MUCH CREDIT CARD DEBT DO YOU HAVE? IE – HOW MUCH OF AN OUTSTANDING BALANCE DO YOU CARRY OVER FROM MONTH TO MONTH?

Posed to all respondents.



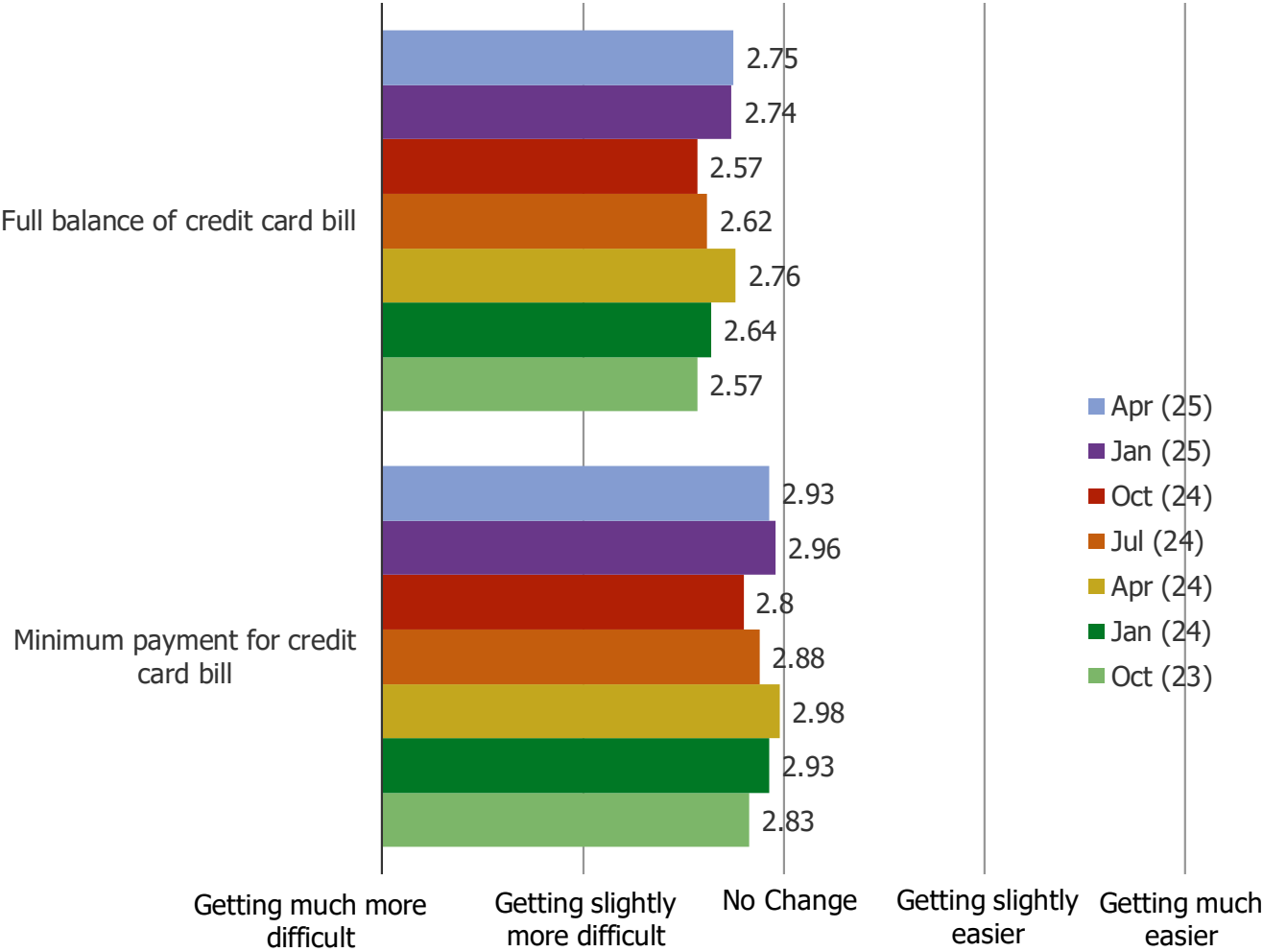
HAS THE AMOUNT OF CREDIT CARD DEBT THAT YOU HAVE BEEN INCREASING OR DECREASING OVER THE PAST 12 MONTHS?

Posed to all respondents.



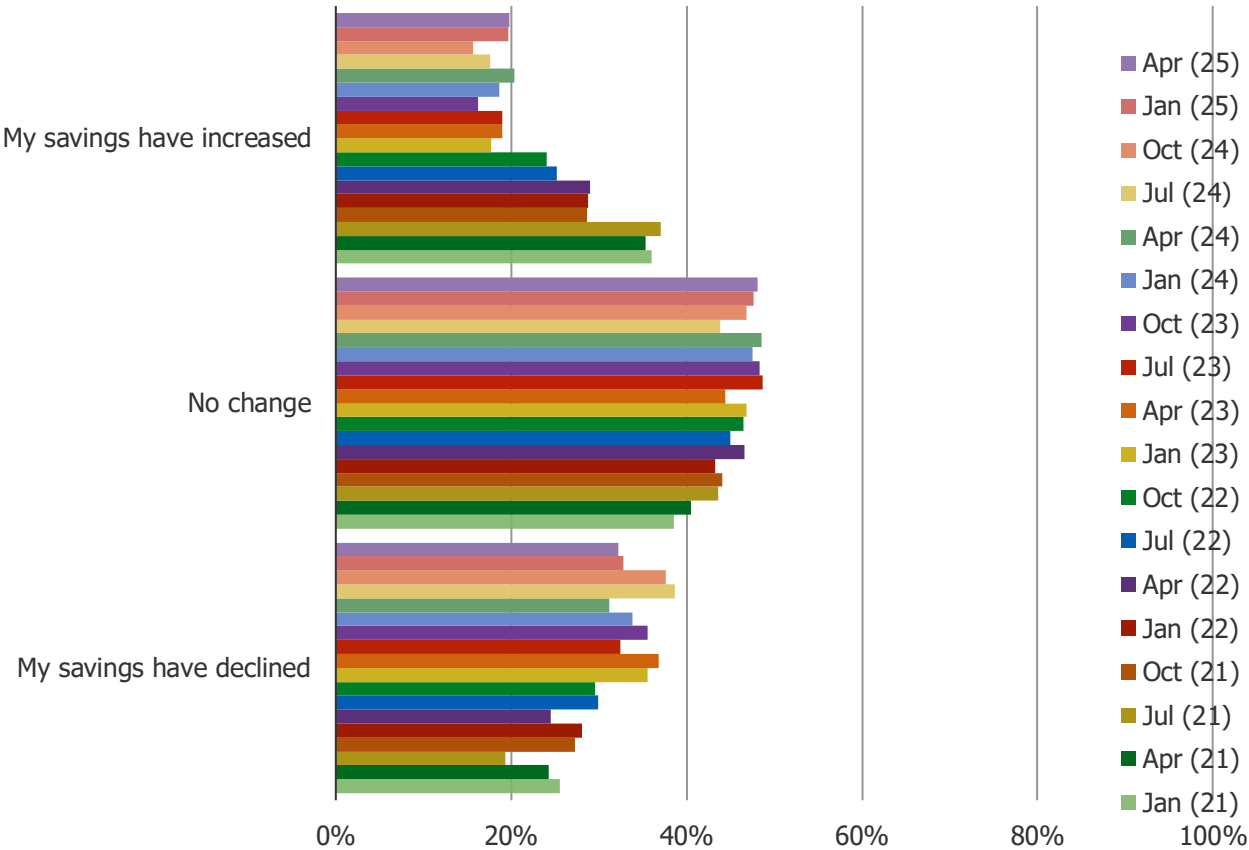
IS IT GETTING EASIER OR MORE DIFFICULT TO PAY THE FOLLOWING EACH MONTH...

Posed to all respondents.



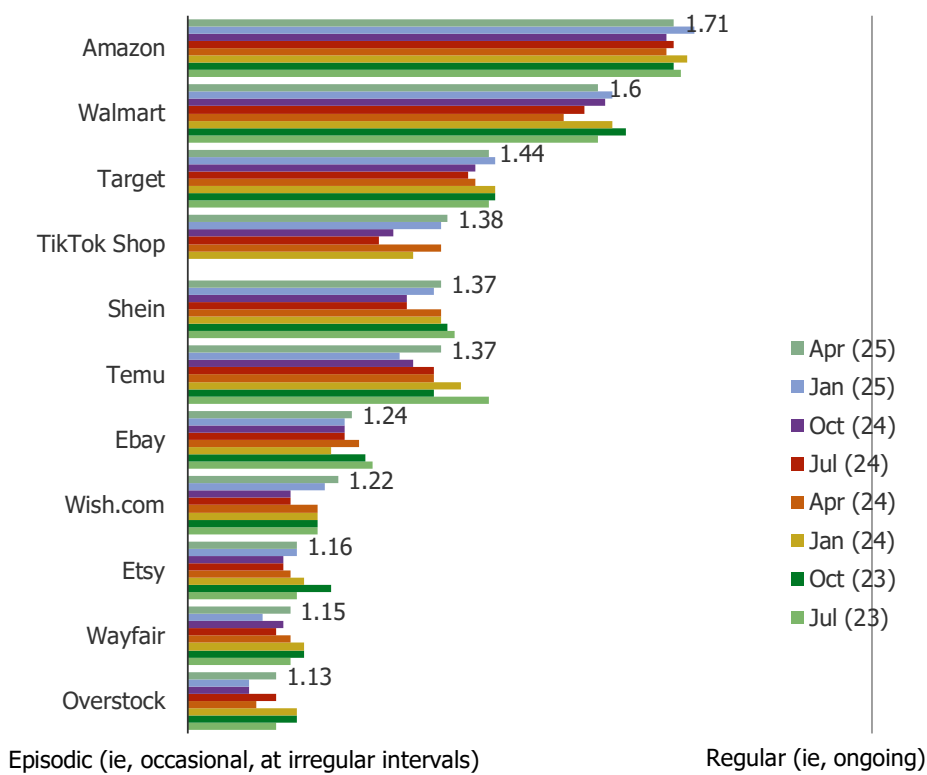
TO THE BEST OF YOUR ESTIMATION, DID THE AMOUNT OF MONEY YOU HAVE SAVED CHANGE SINCE THE START OF THE COVID-19 PANDEMIC?

Posed to all respondents.

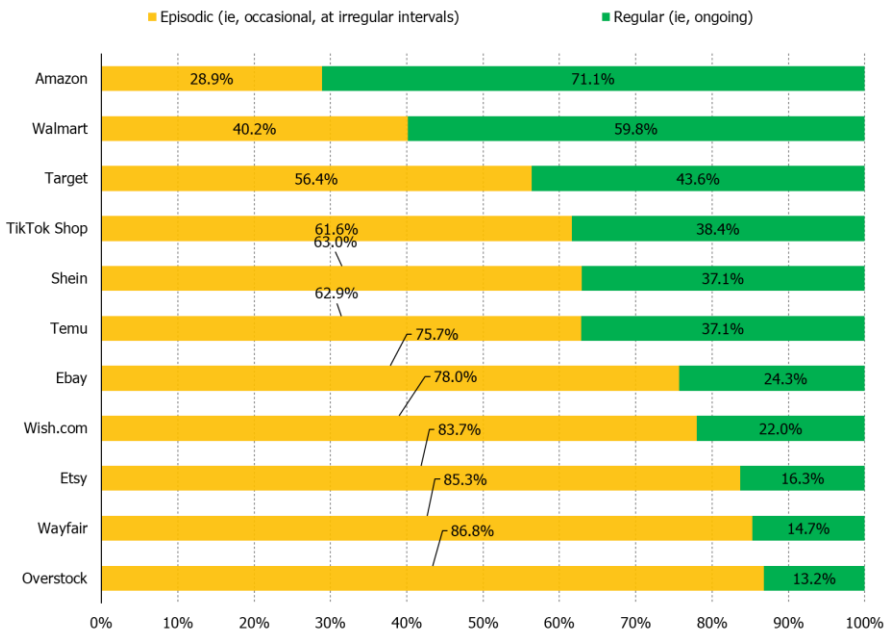


WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.



April 2025 Breakout



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

[illegible]

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

[illegible]

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

Etsy



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

[illegible]

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

Wayfair



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

Wal-Mart



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

Target



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

[illegible]

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

Temu



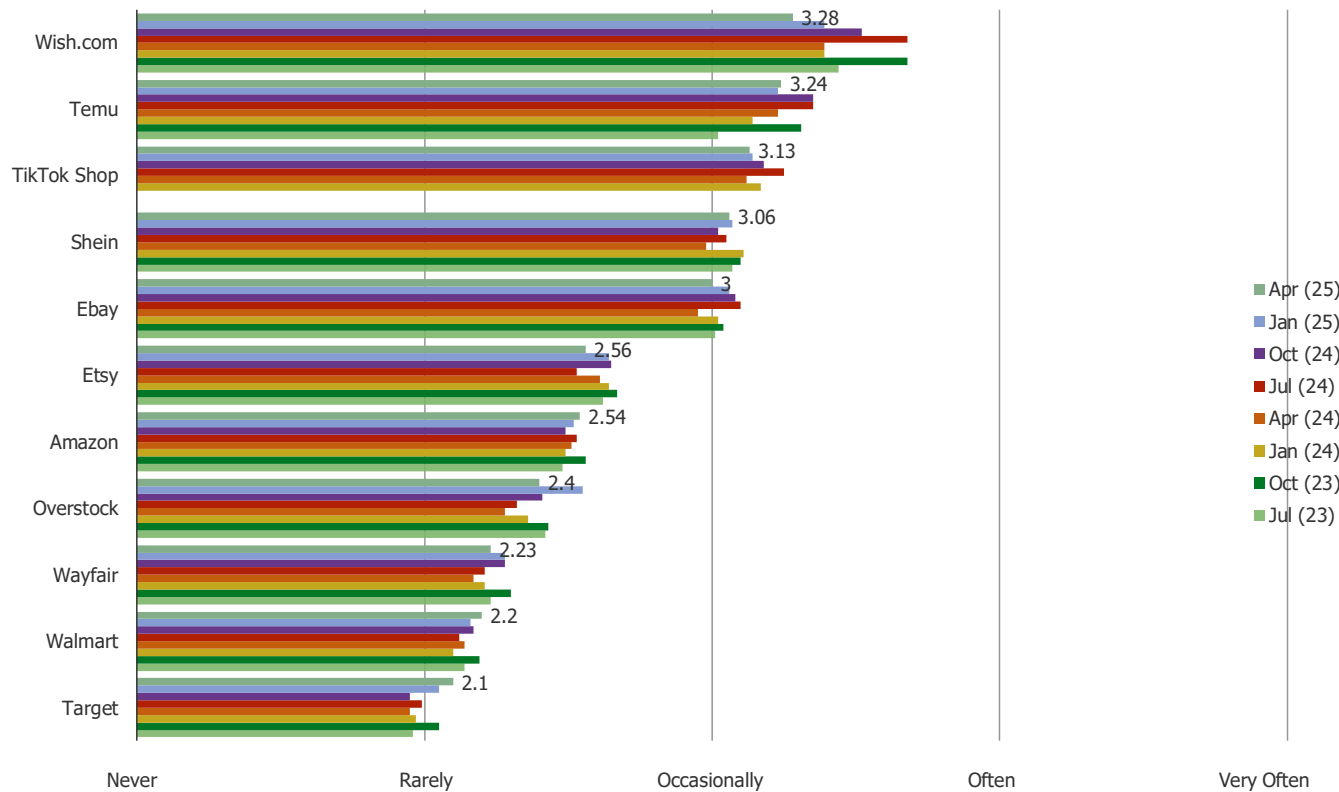
Posed to all respondents who shop the below and their use is more episodic than regular.

Shein

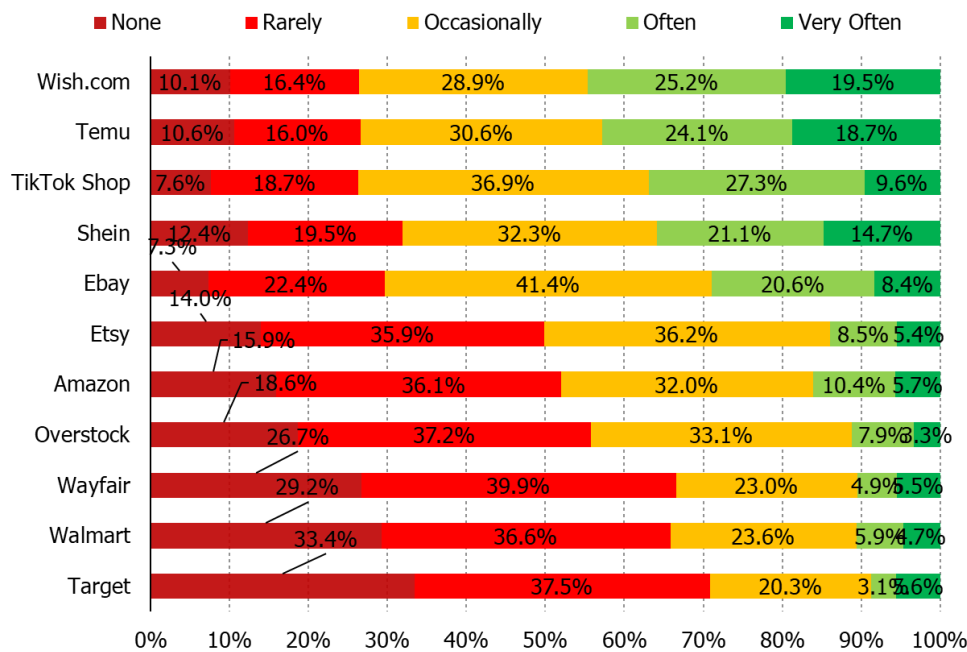


HOW OFTEN DO YOU THINK THERE ARE COUNTERFEIT / FAKE ITEMS BEING SOLD ON THIS PLATFORM?

Posed to all respondents who shop the below.

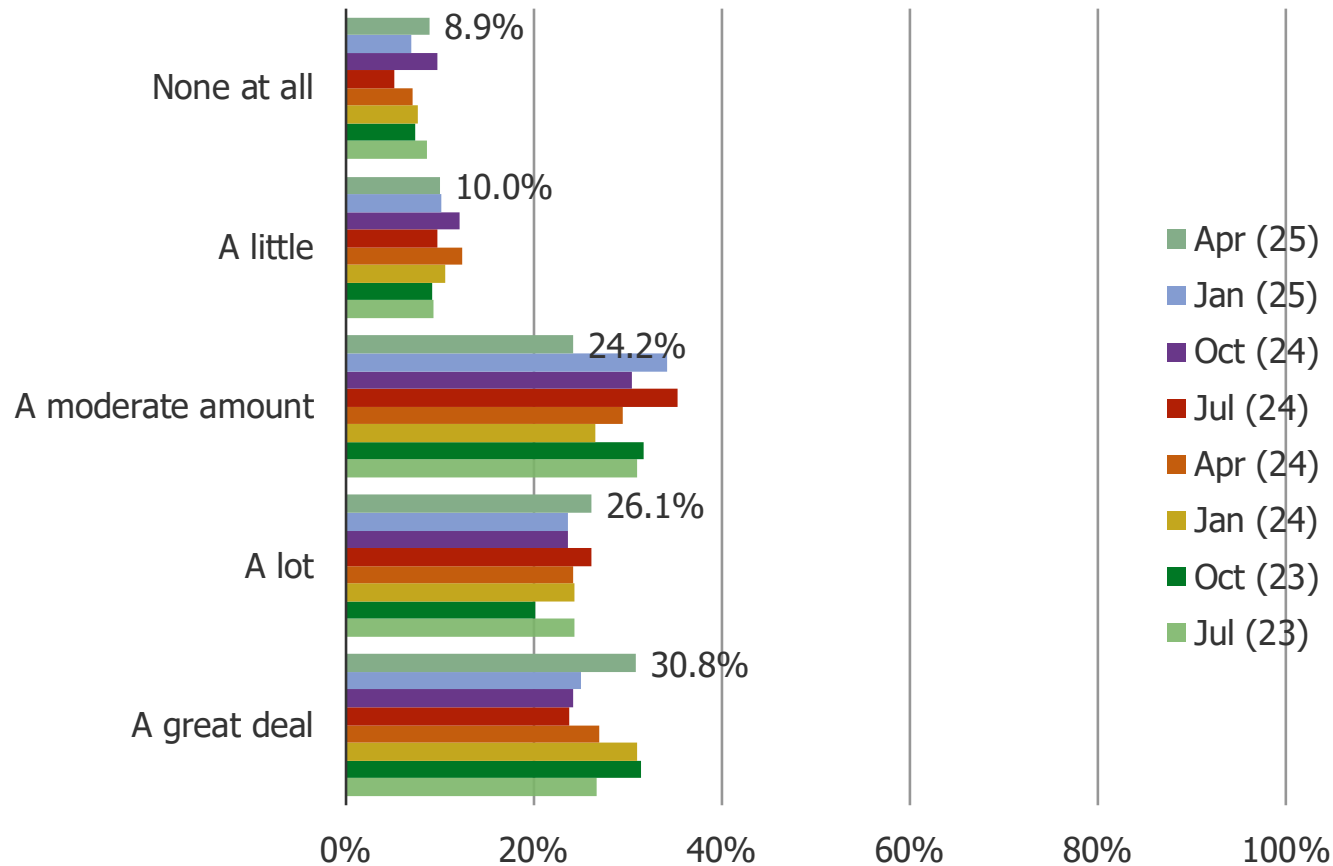


April 2025 Breakout



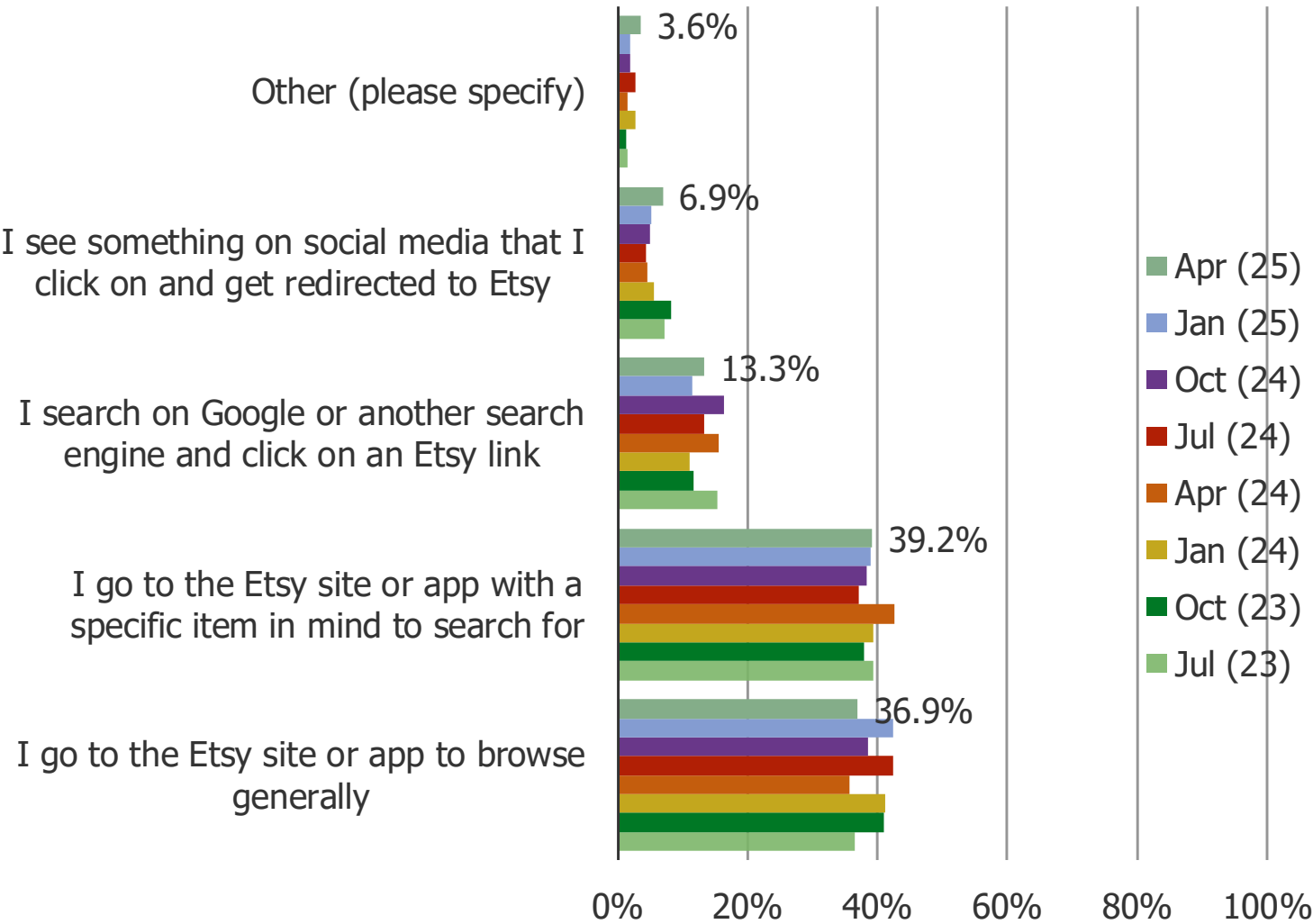
WHEN YOU SHOP ETSY, HOW MUCH DOES IT MATTER TO YOU THAT YOU ARE SUPPORTING SMALL BUSINESSES AND MAKING A POSITIVE IMPACT WITH YOUR PURCHASES?

Posed to all respondents who shop Etsy.



HOW DO YOU MOST COMMONLY FIND YOURSELF SHOPPING ON ETSY?

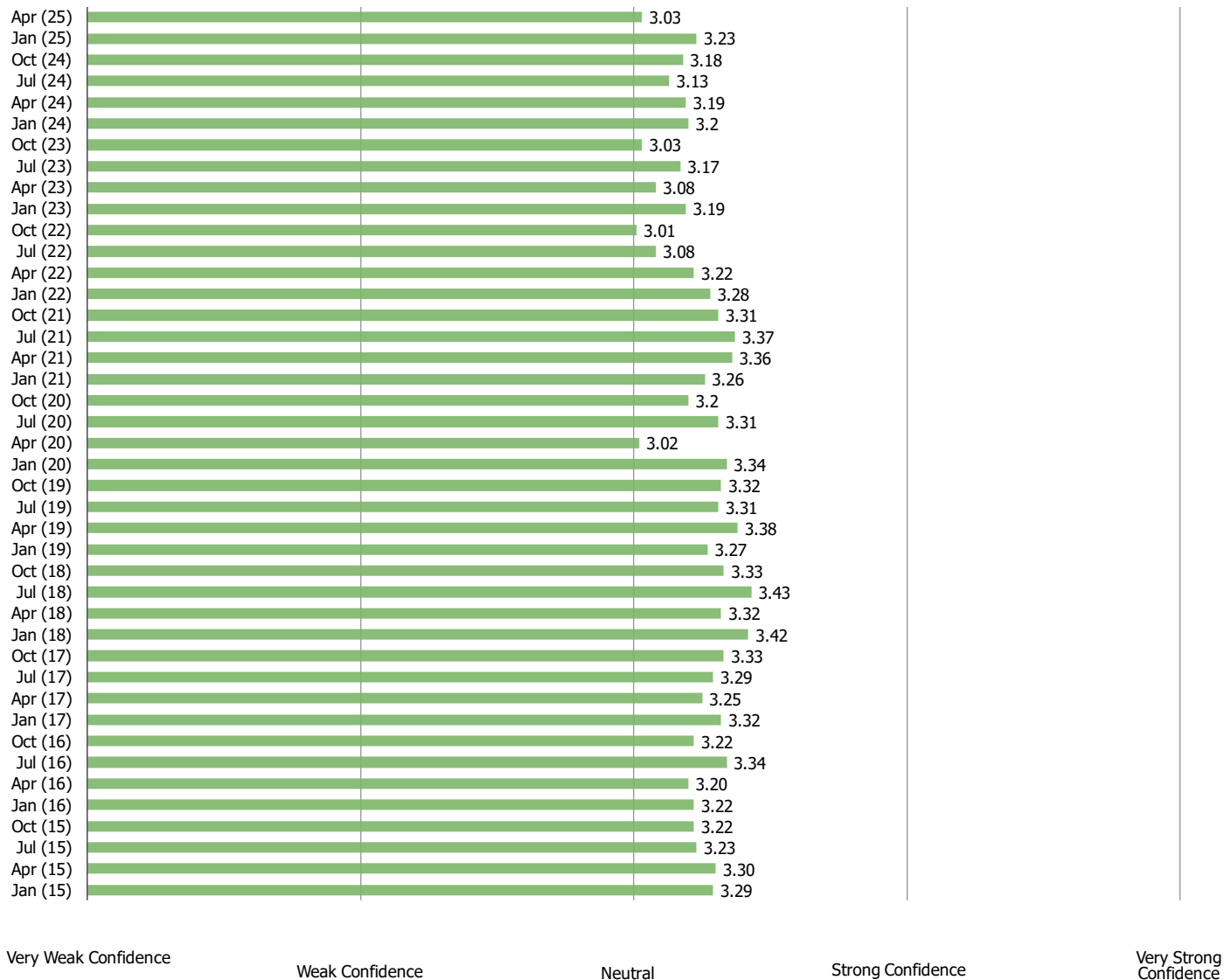
Posed to all respondents who shop Etsy.



OVERALL SHOPPING TRENDS

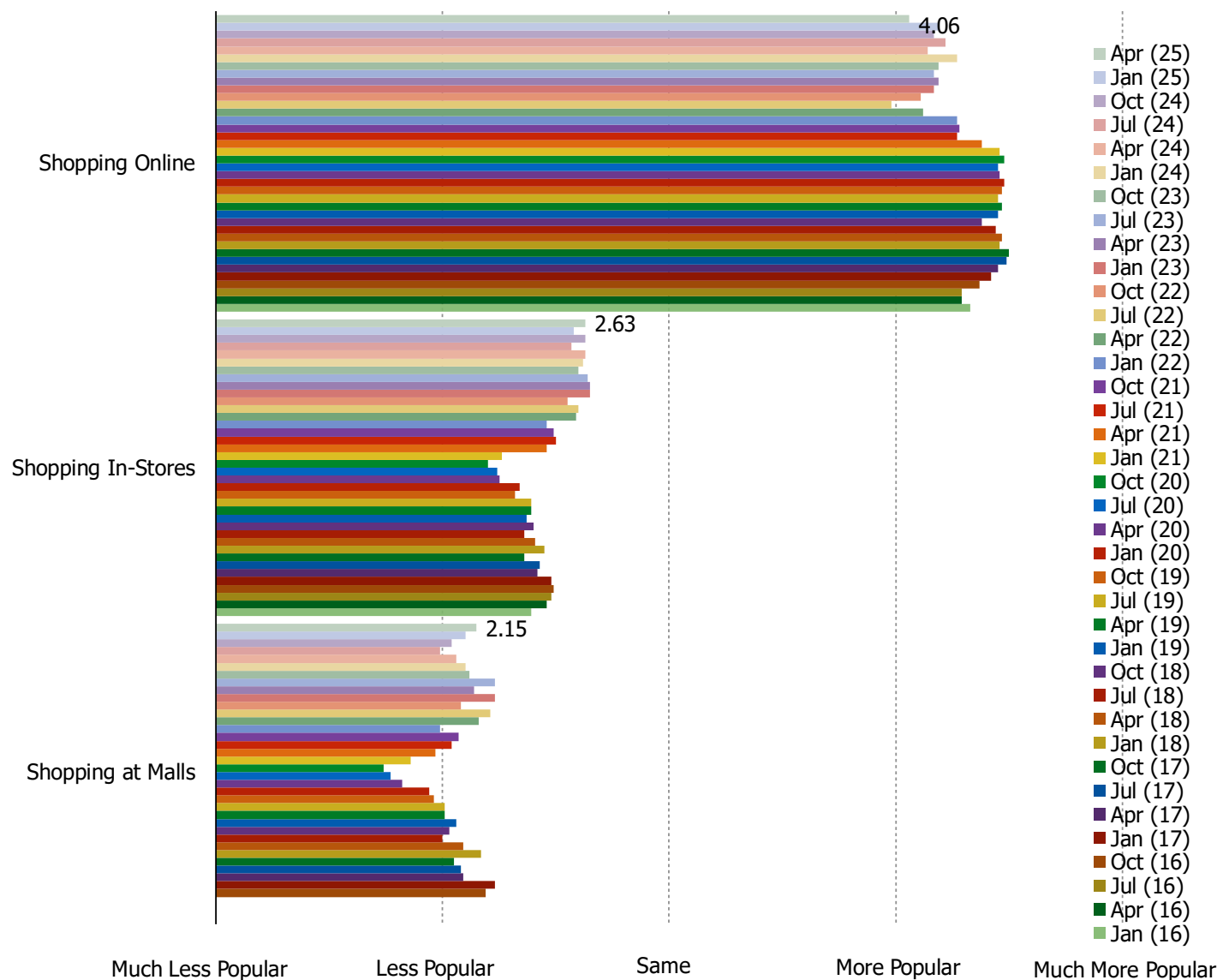
HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



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

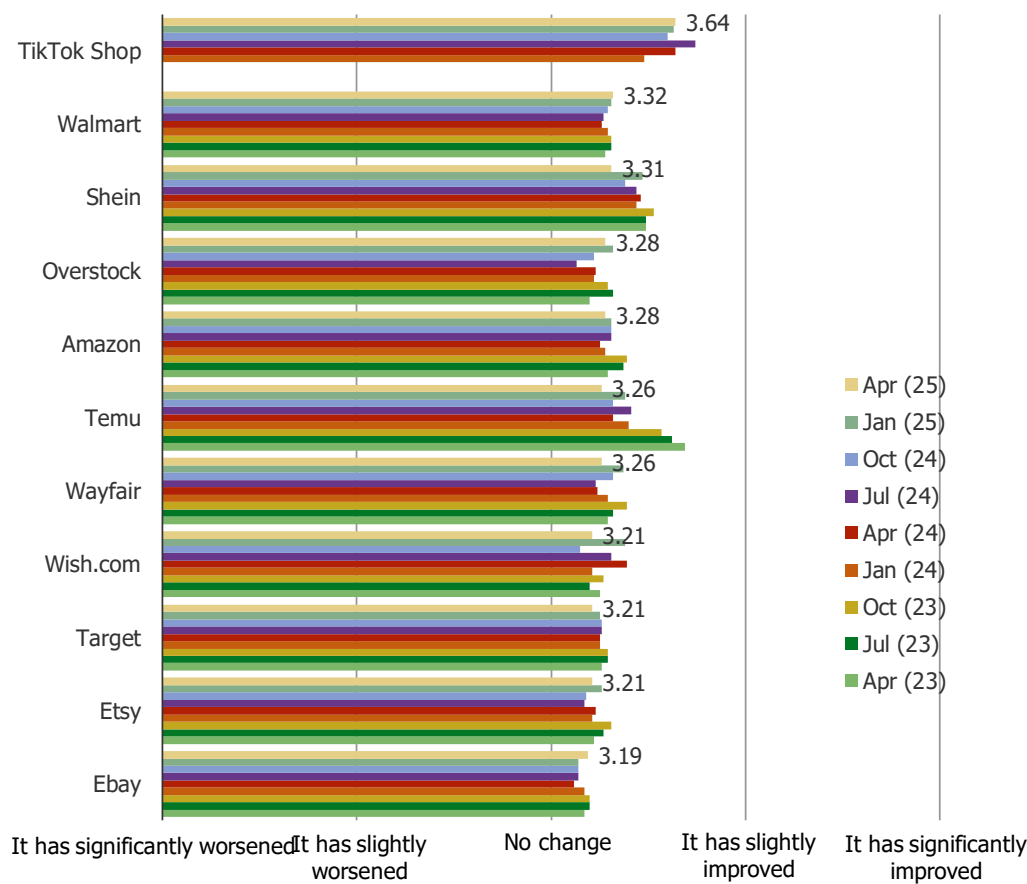
Posed to all respondents



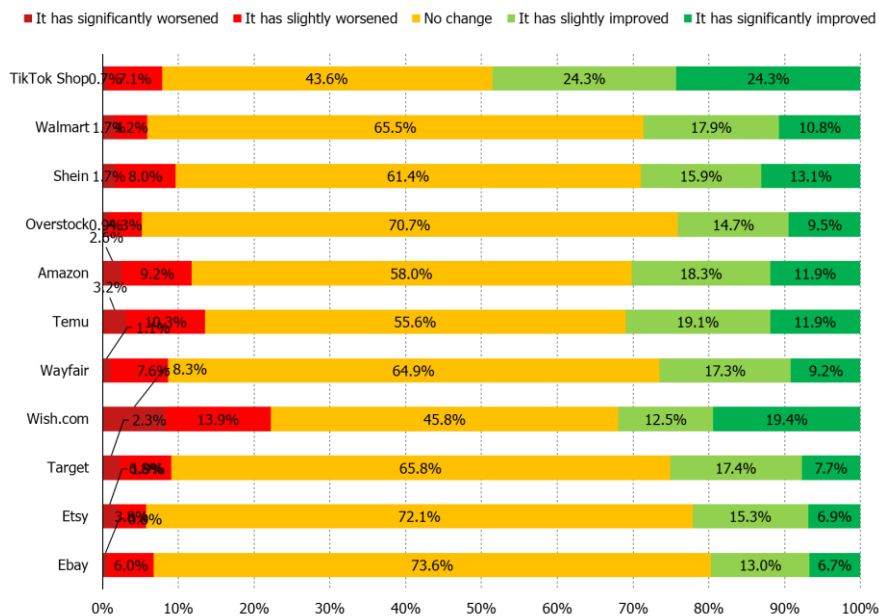
SALES AND TRUST

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:

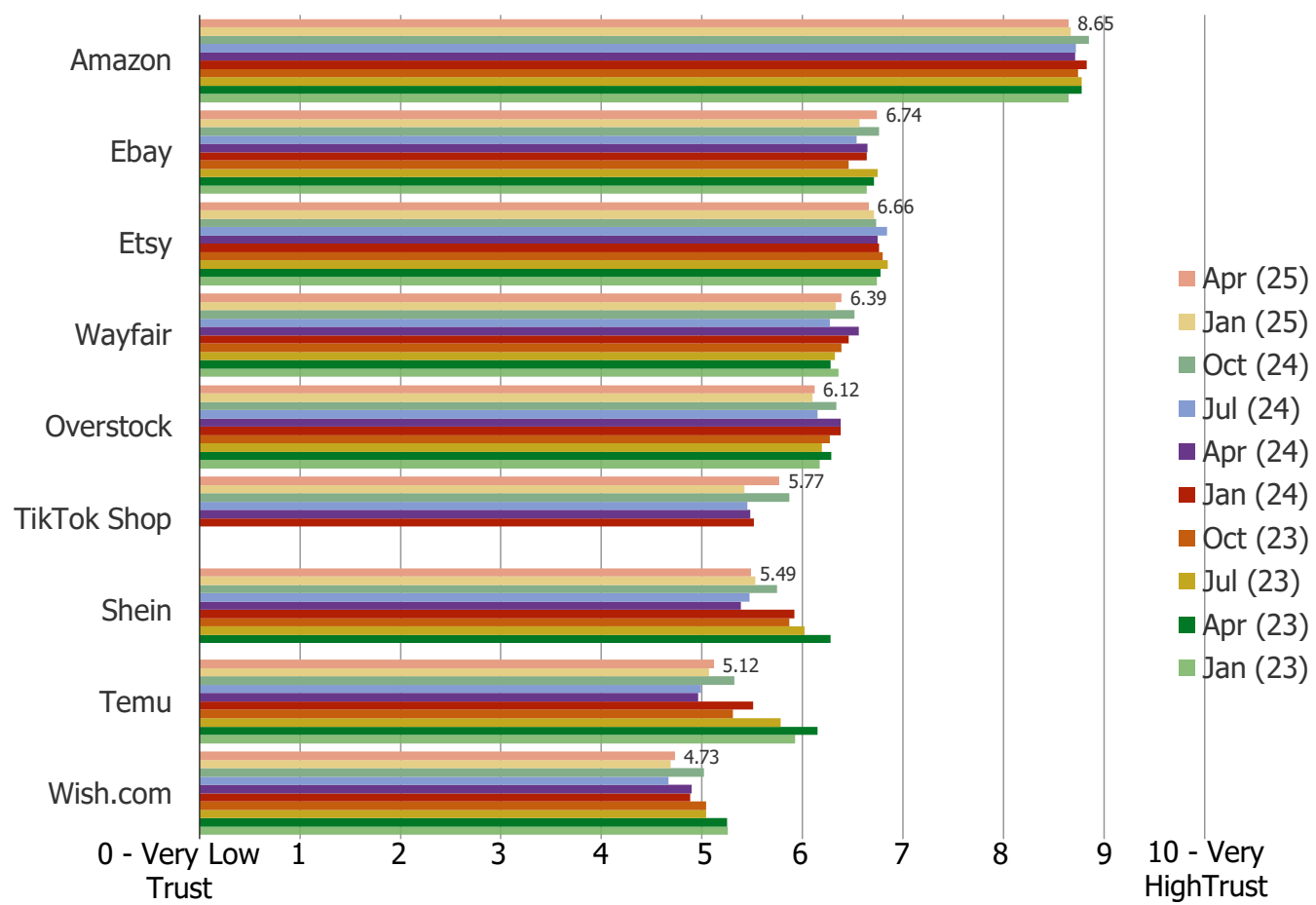


April 2025 Breakout



HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

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

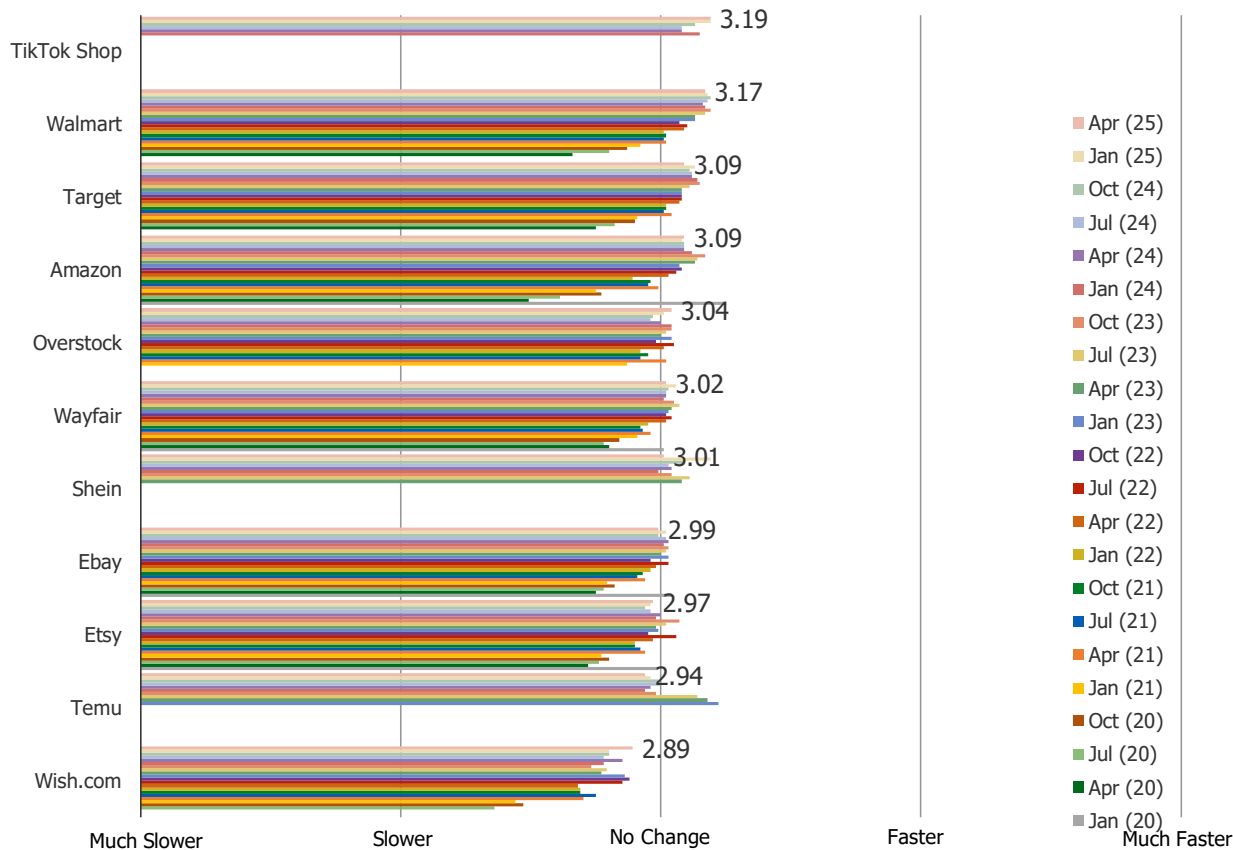


	N=
Etsy	768
Amazon	923
Ebay	859
TikTok Shop	425
Overstock	632
Wayfair	750
Wish.com	445
Temu	768
Shein	577

SHIPPING

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

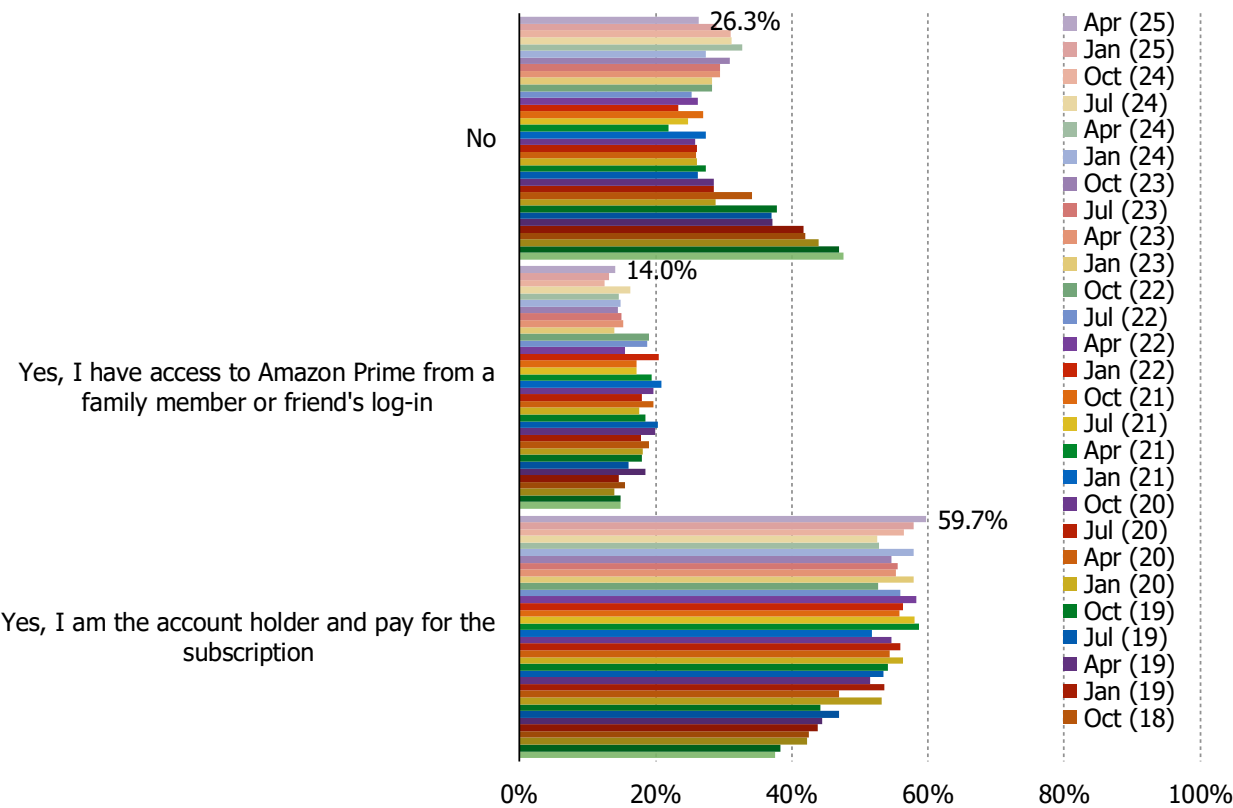
Posed to users of each site/app.



AMZN PRIME TRENDS

ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

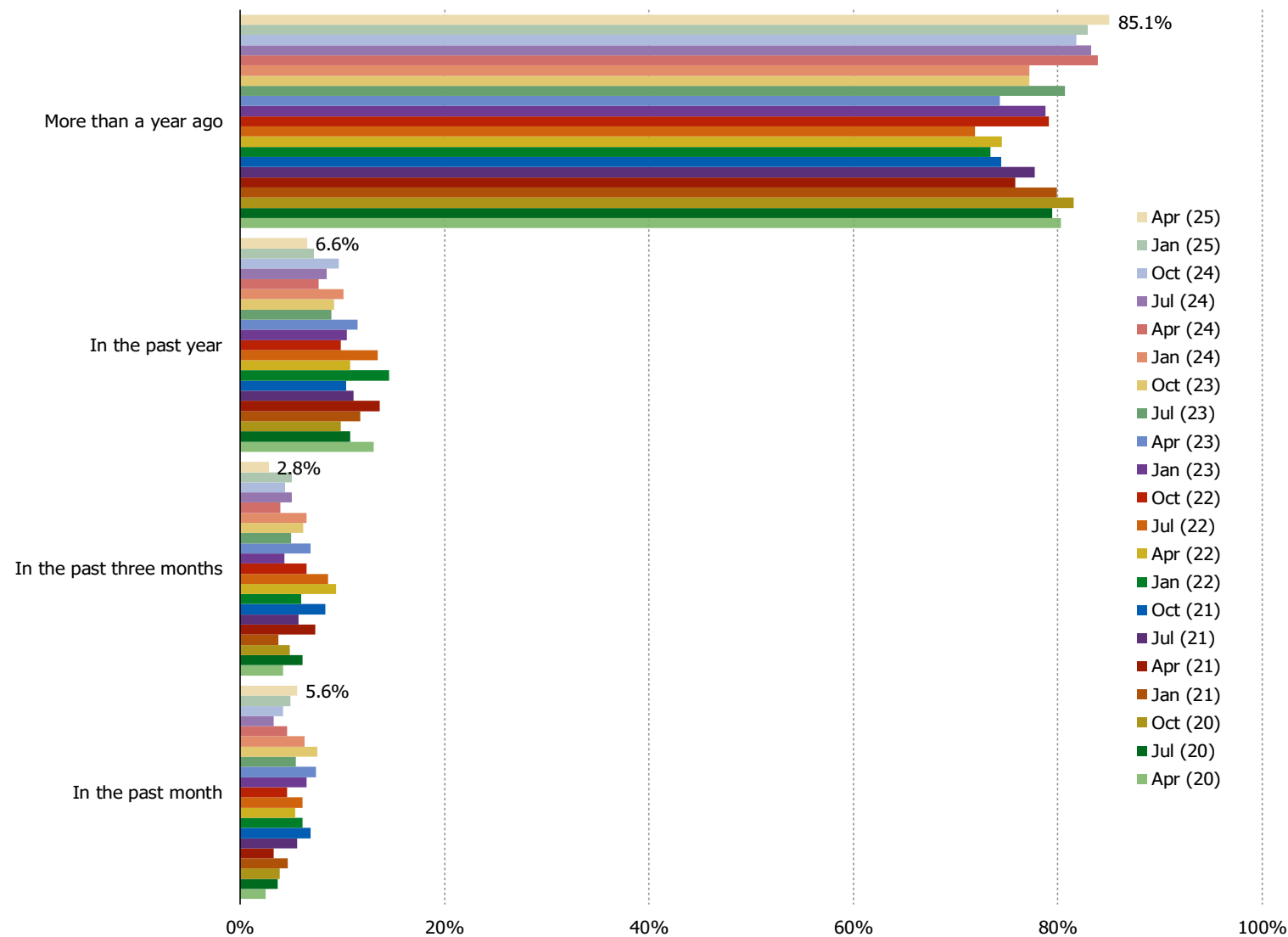
Posed to Amazon users



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.

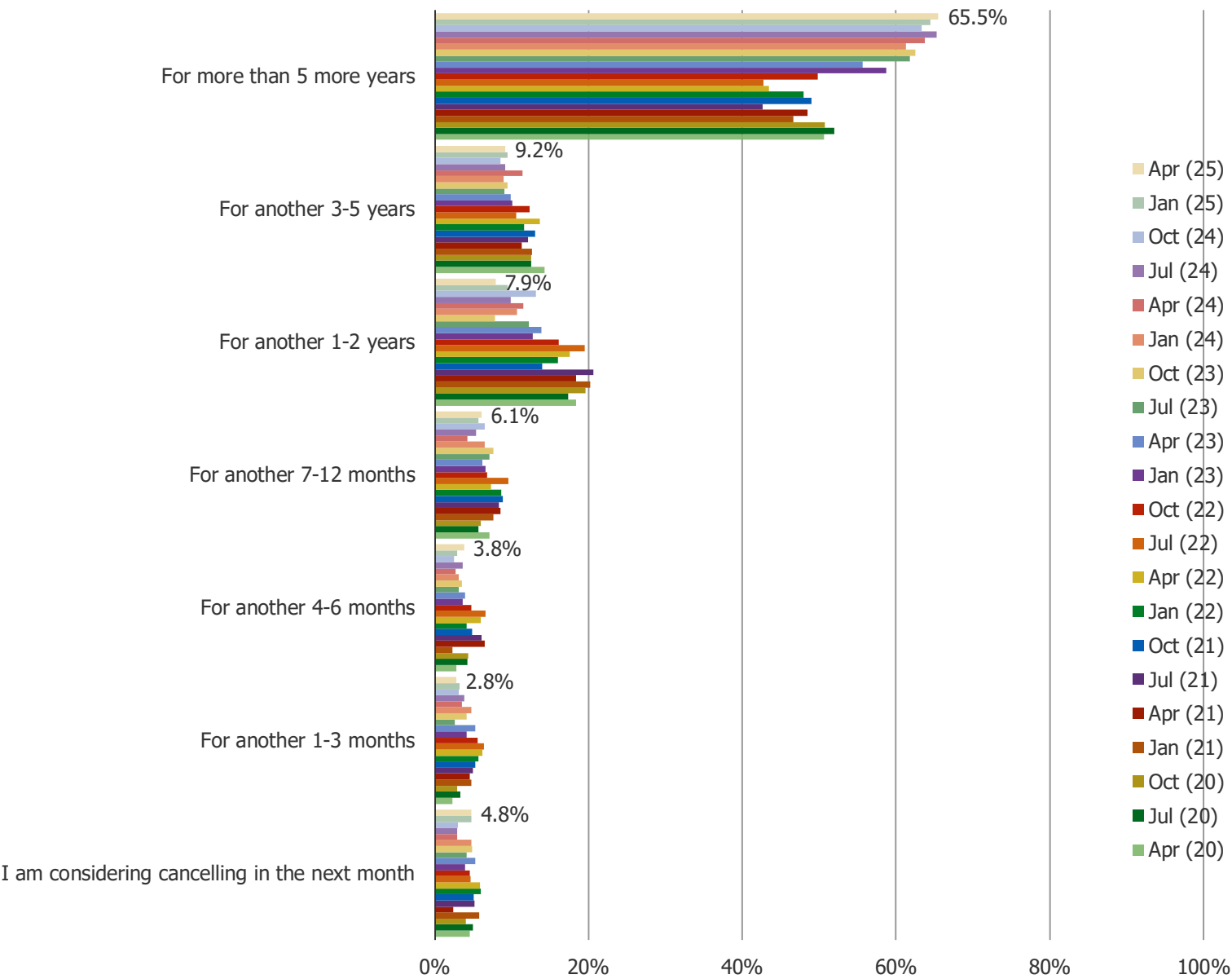
WHEN DID YOU START YOUR CURRENT AMAZON PRIME MEMBERSHIP?

Posed to Amazon users who are Prime members.



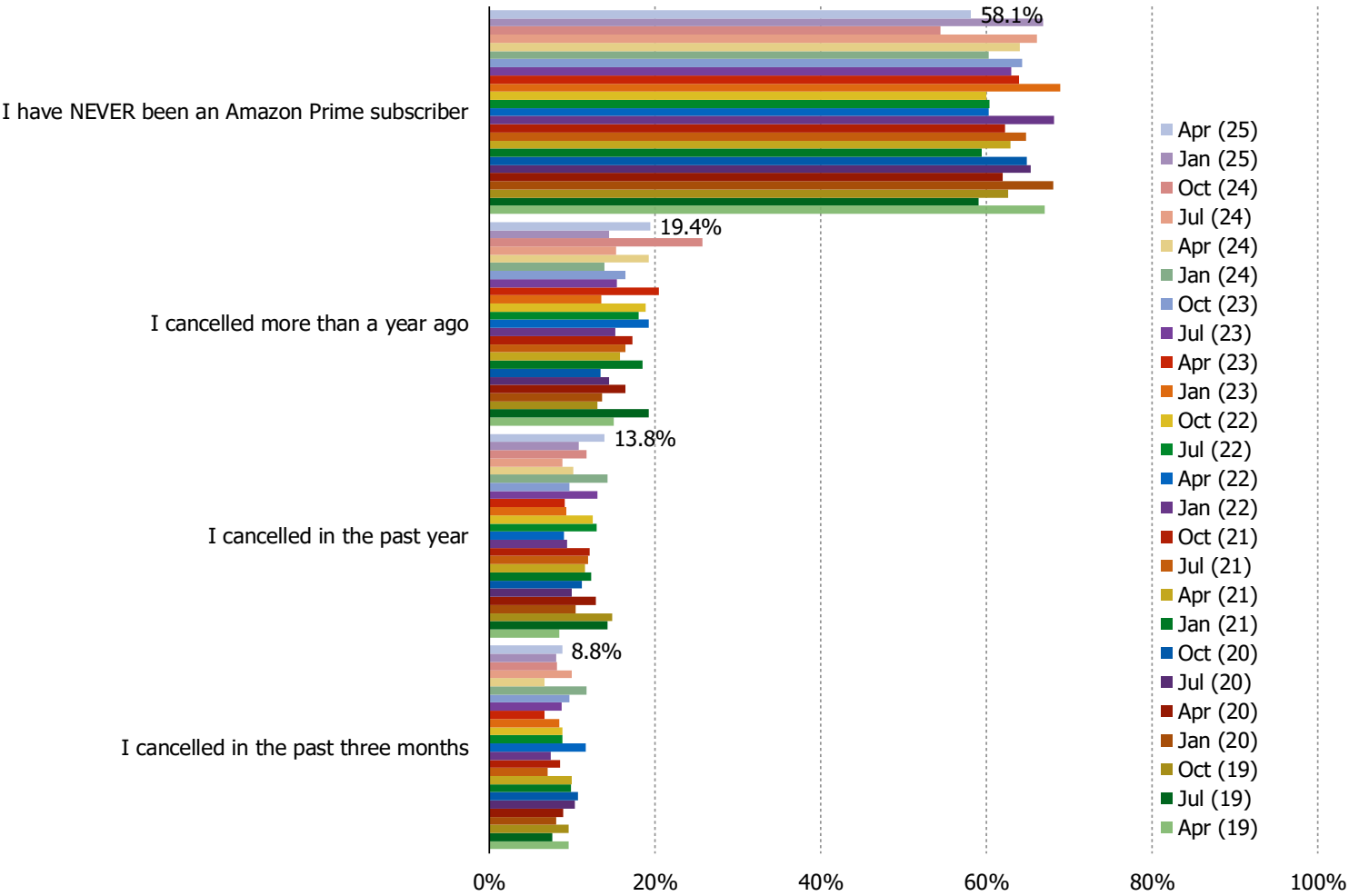
FOR HOW MUCH LONGER DO YOU INTEND TO BE AN AMAZON PRIME MEMBER?

Posed to Amazon users who are Prime members.



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

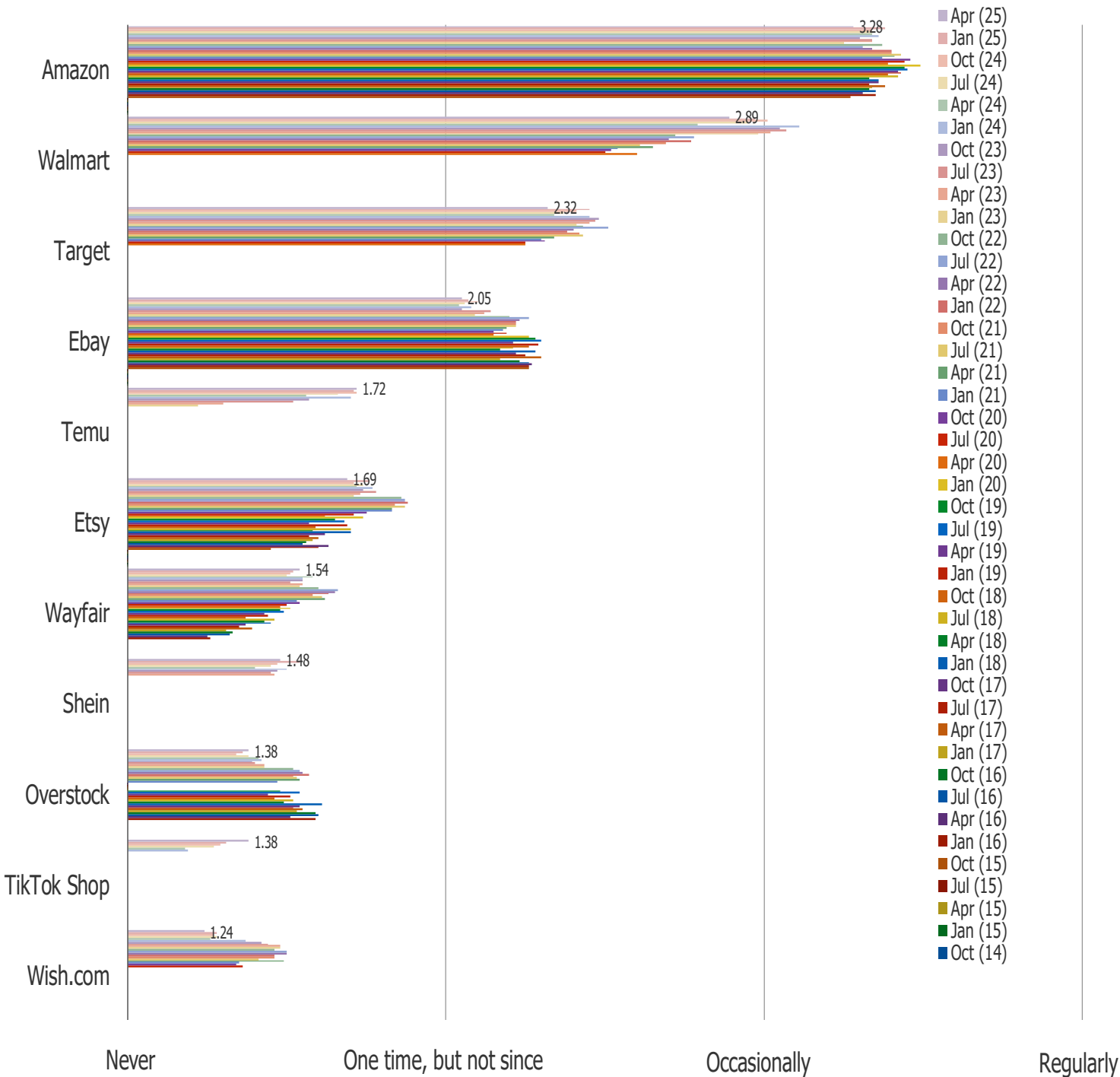
Posed to Amazon users who are not prime subscribers



COMPETITIVE DYNAMICS

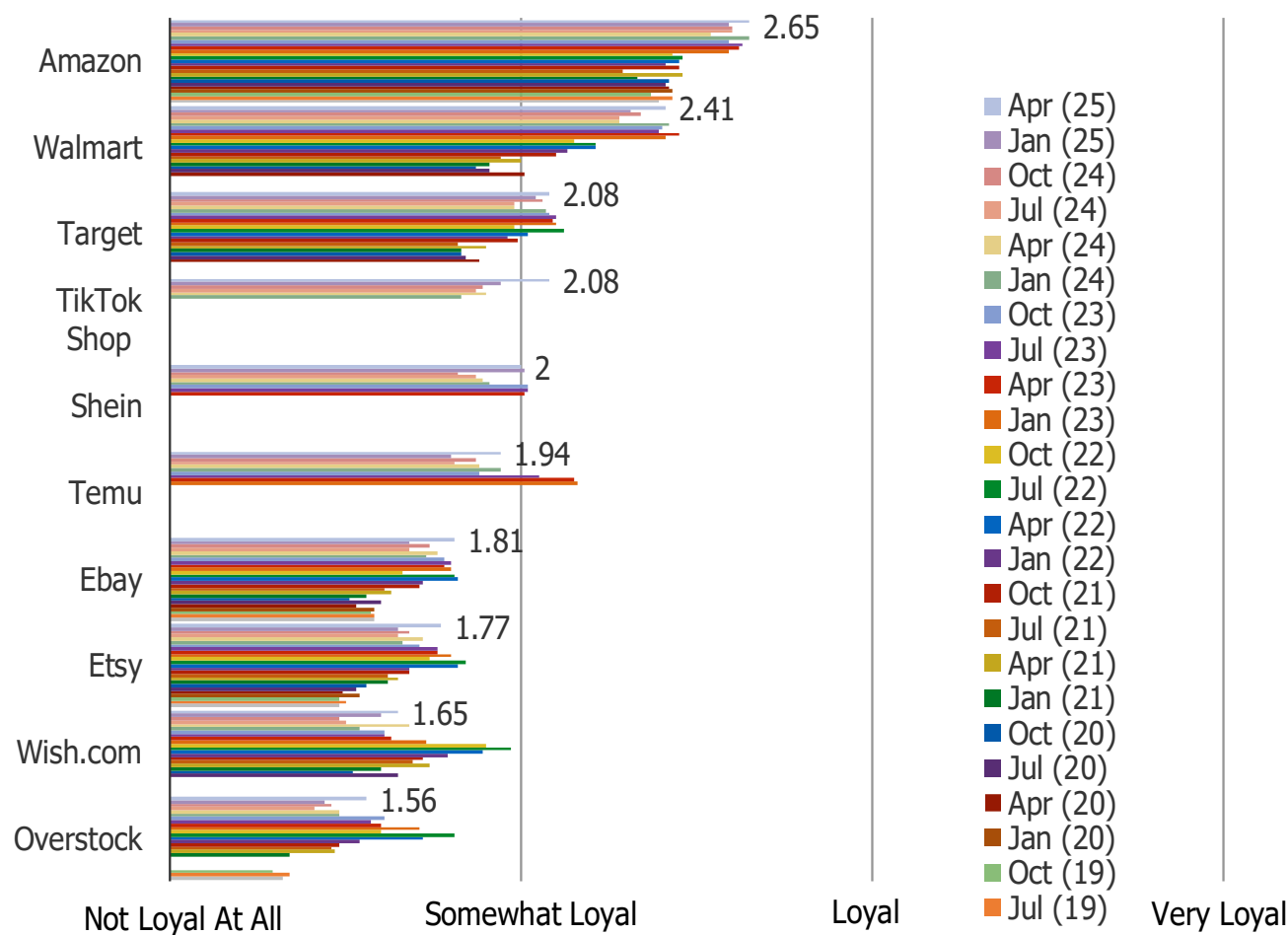
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



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

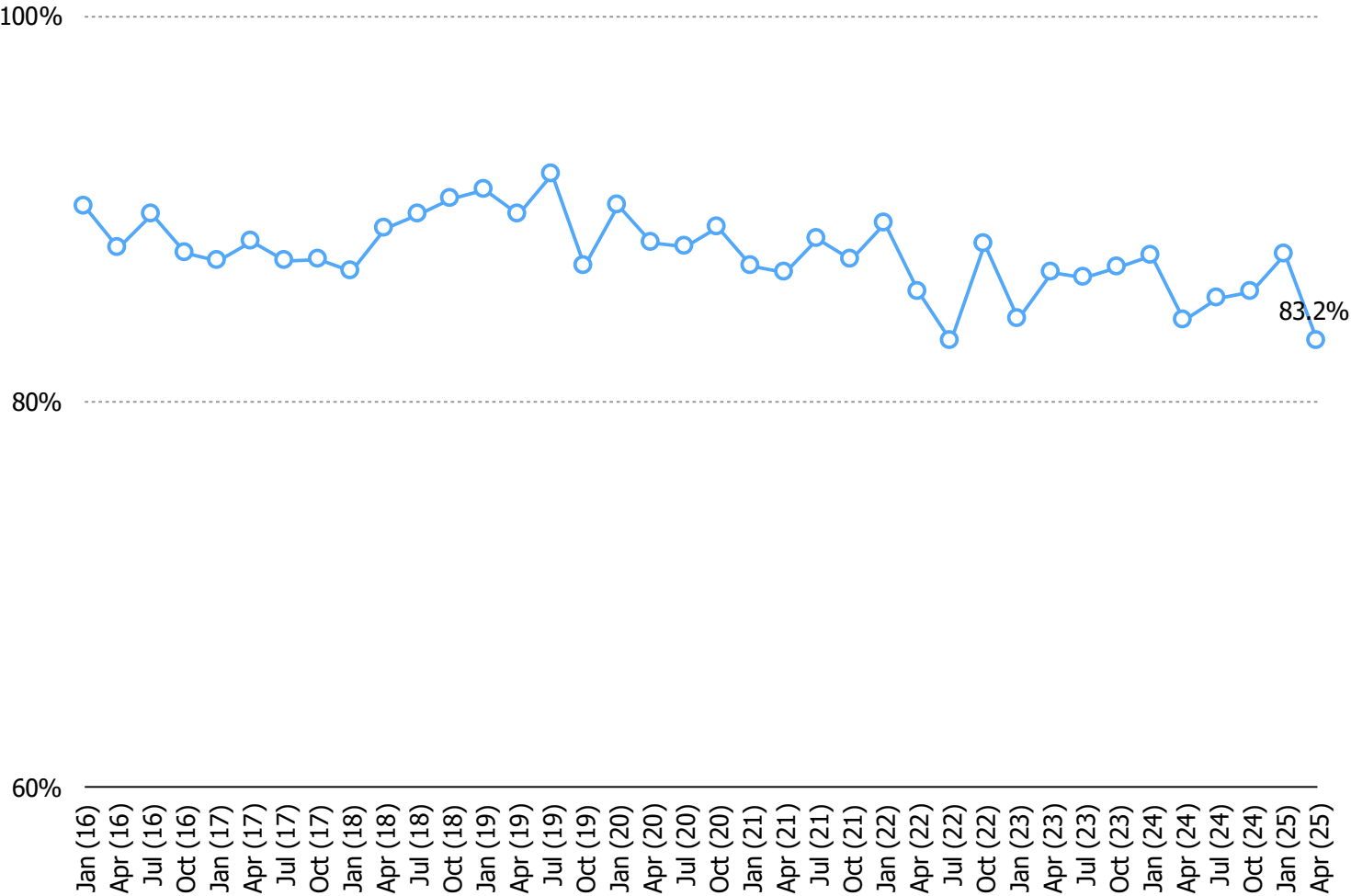
Posed to users of each site/app



AMZN TRENDS

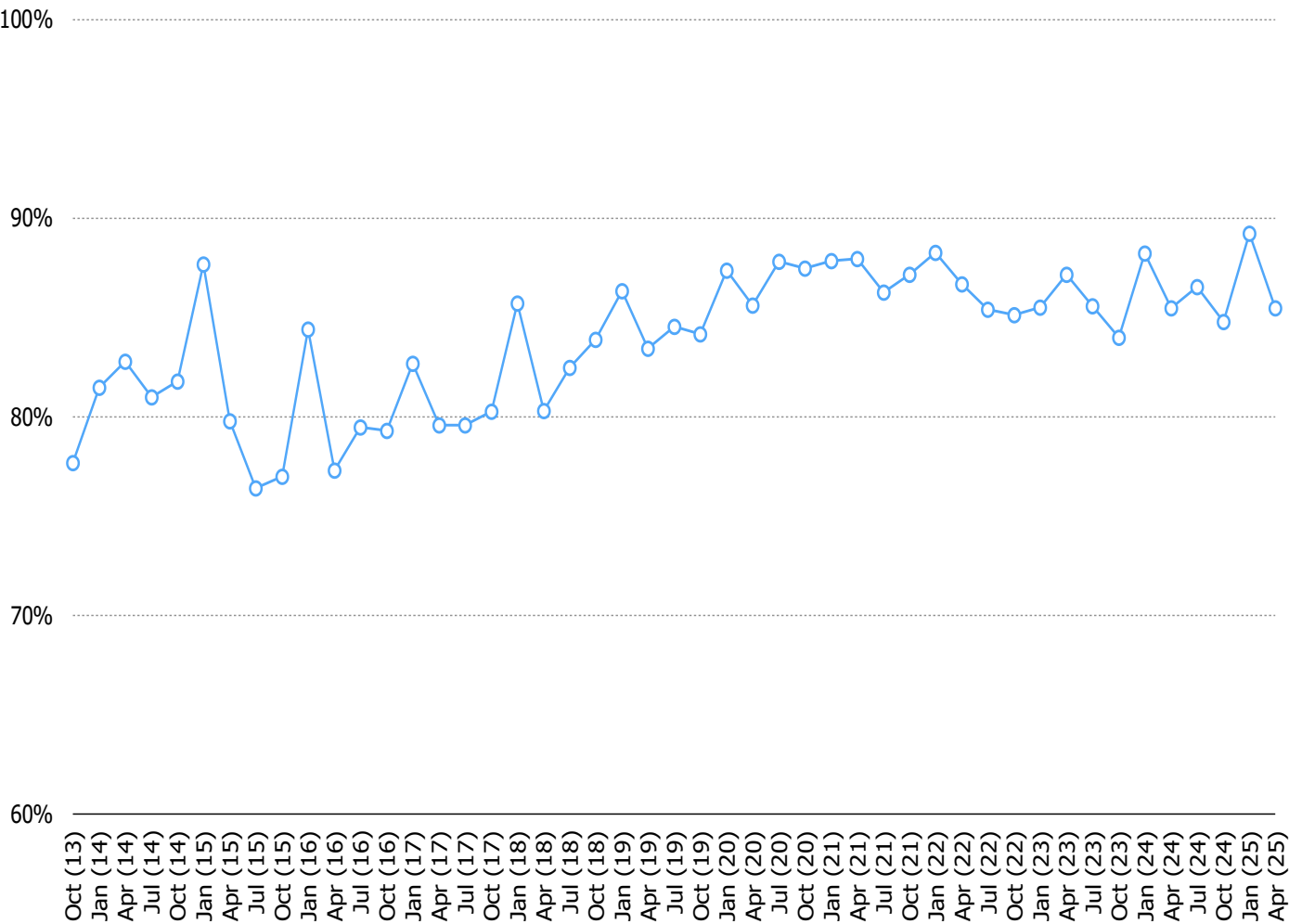
DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.



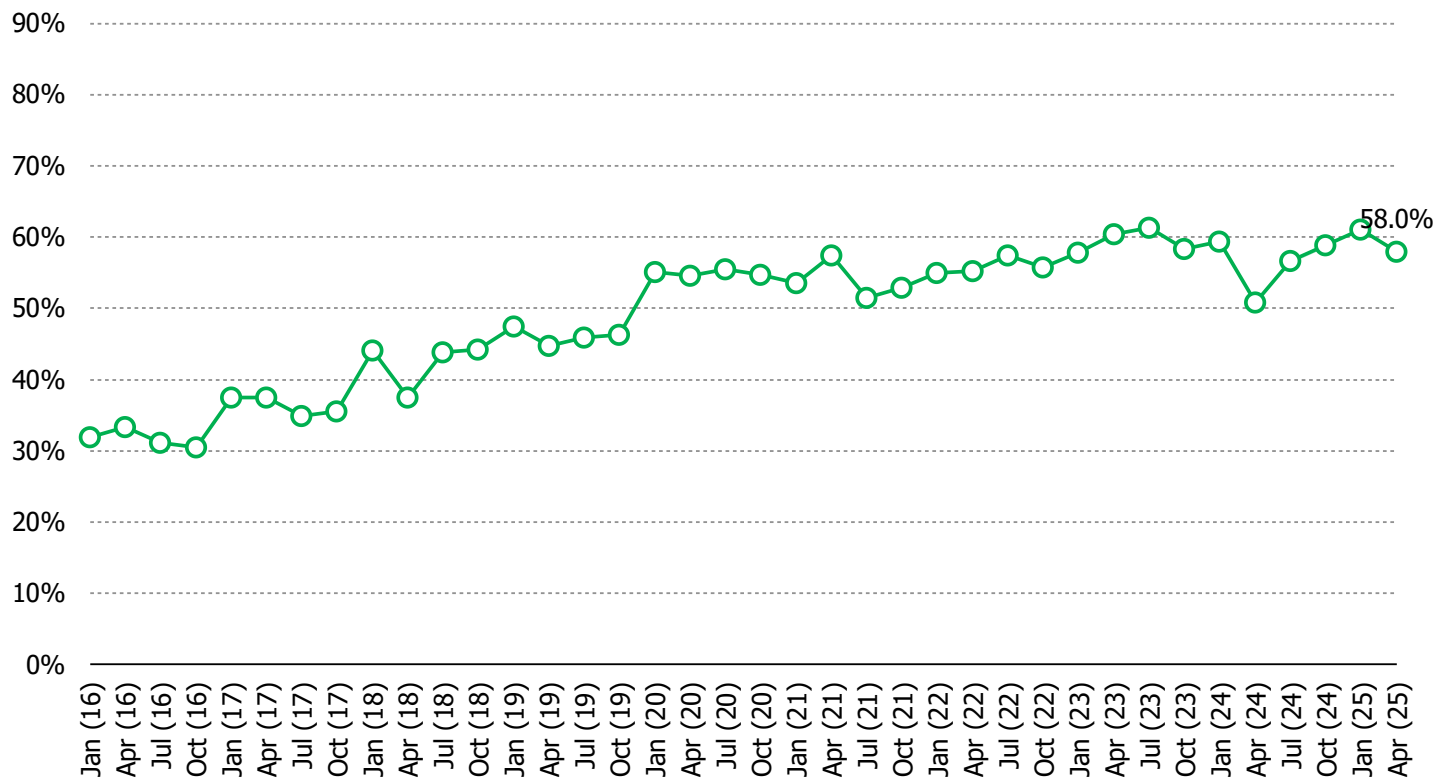
AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

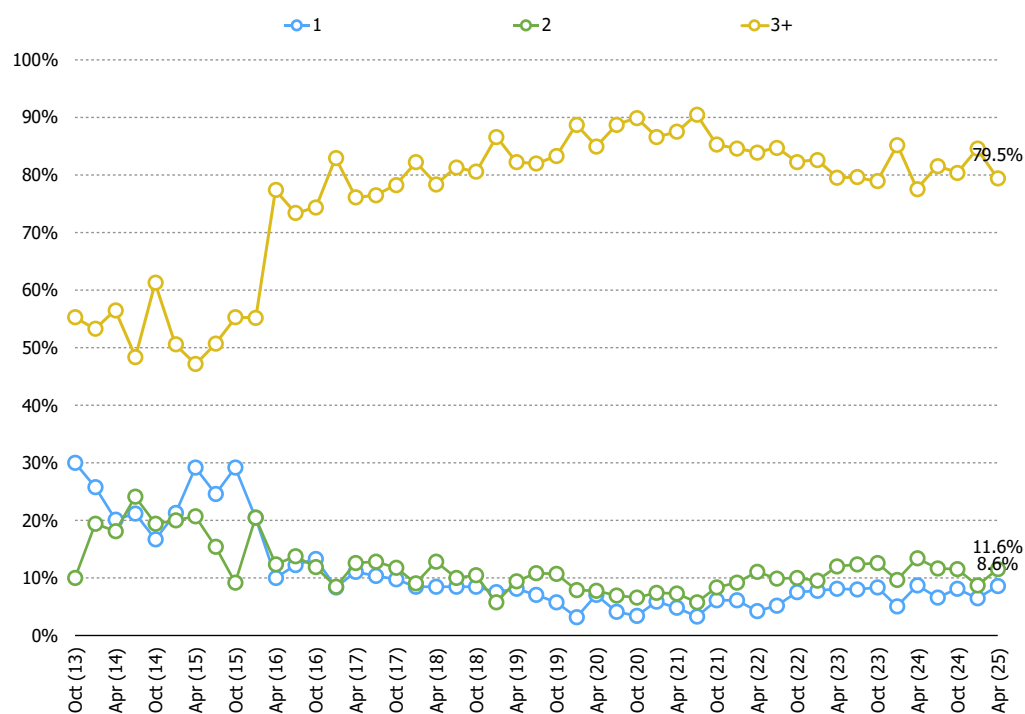


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

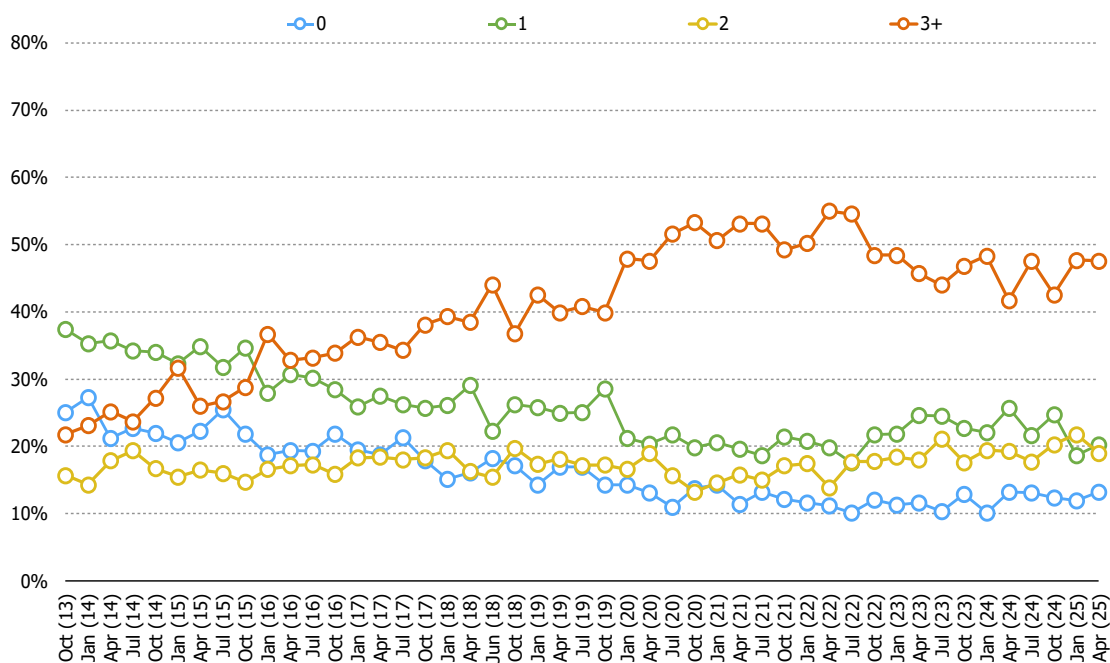
Posed to Amazon users



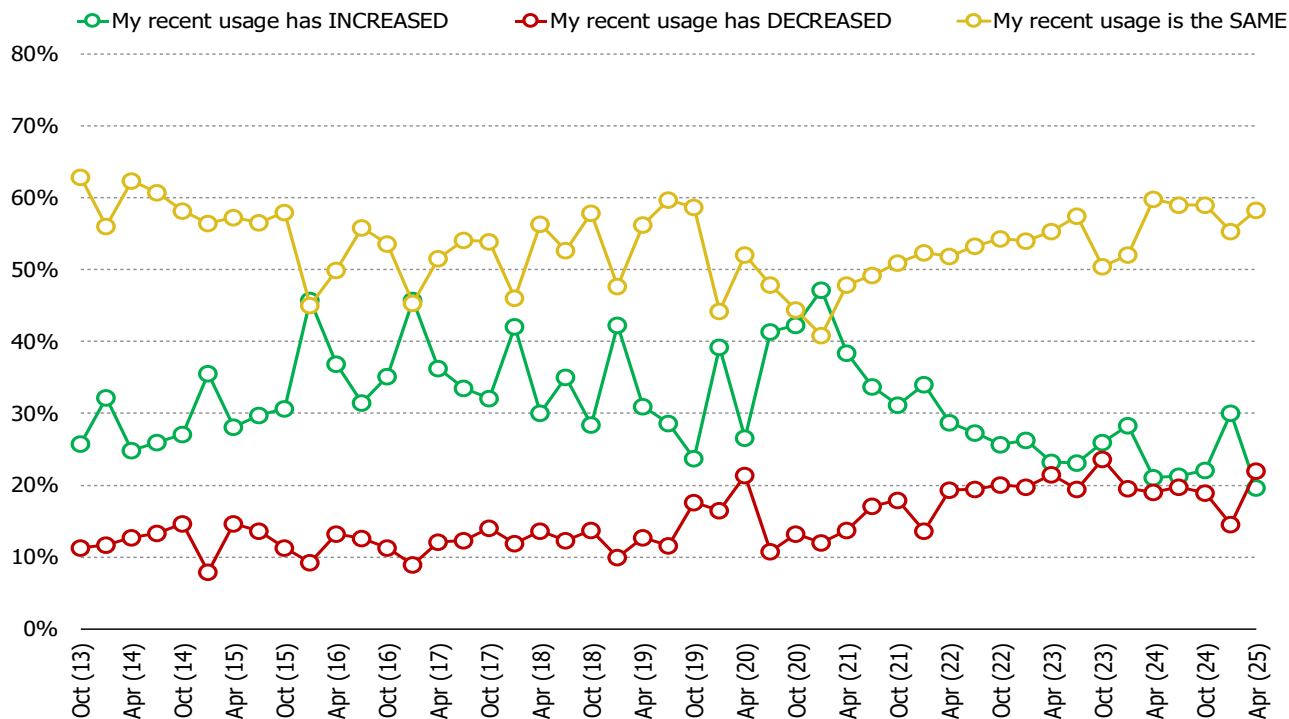
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



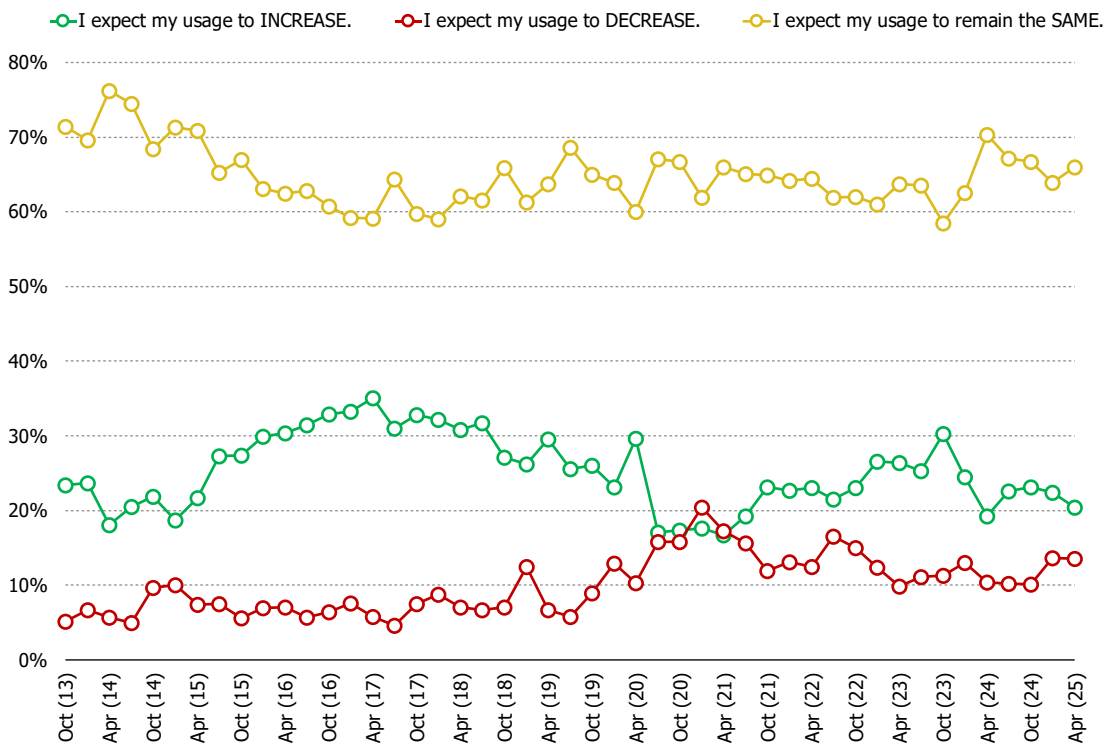
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



AMAZON USERS – RECENT USAGE

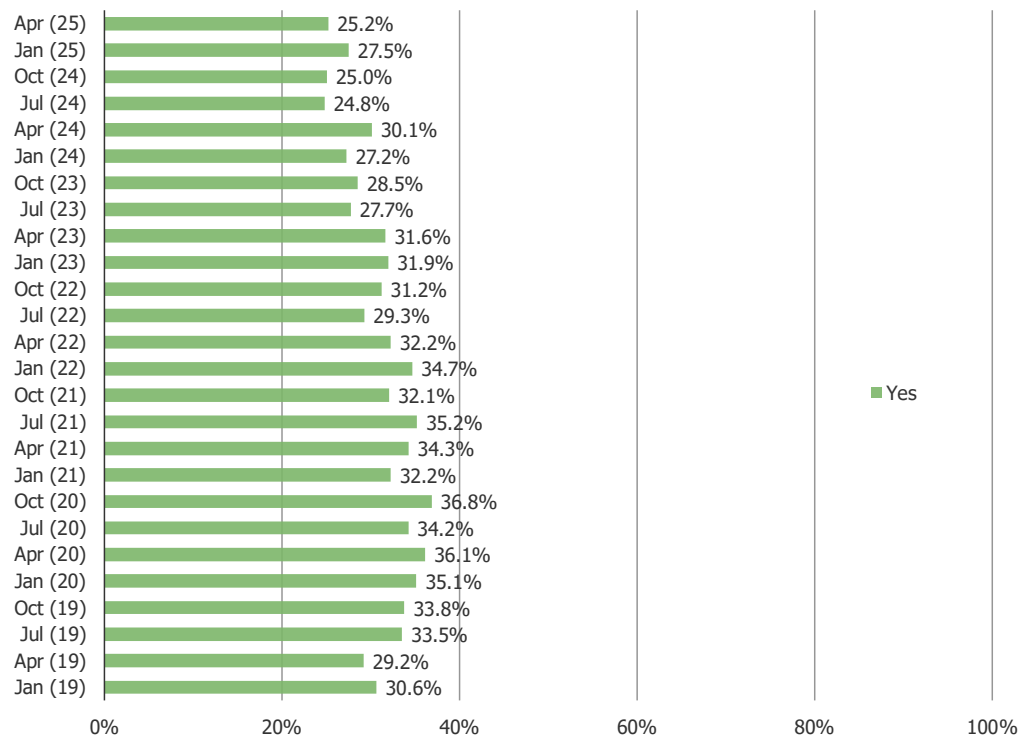


AMAZON USERS – EXPECTED USAGE

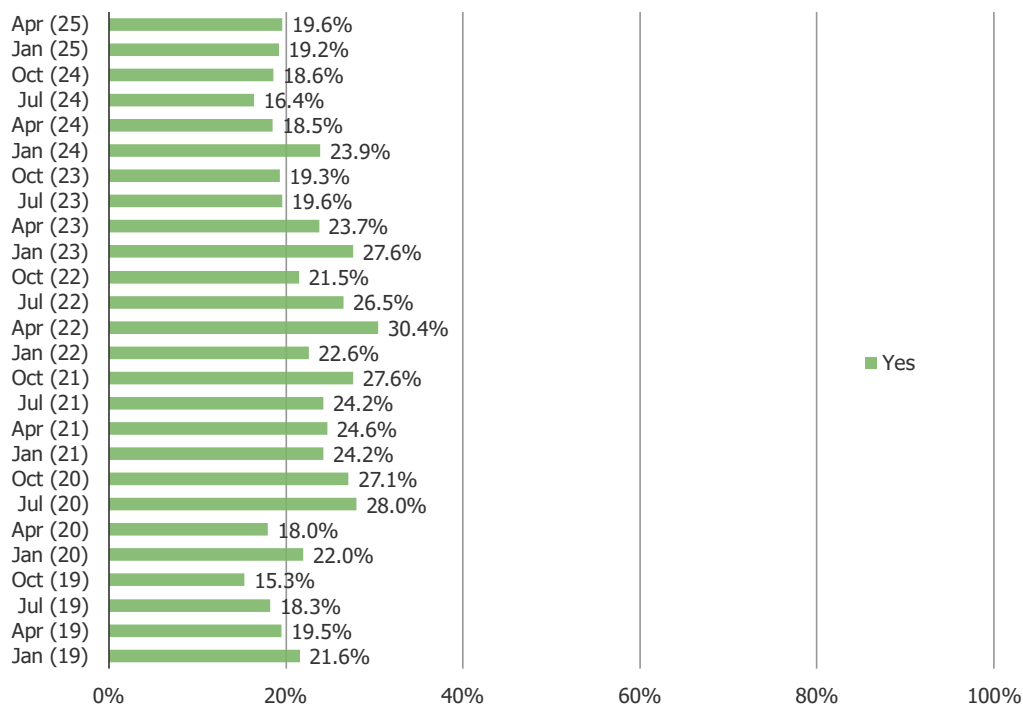


WAYFAIR TRENDS

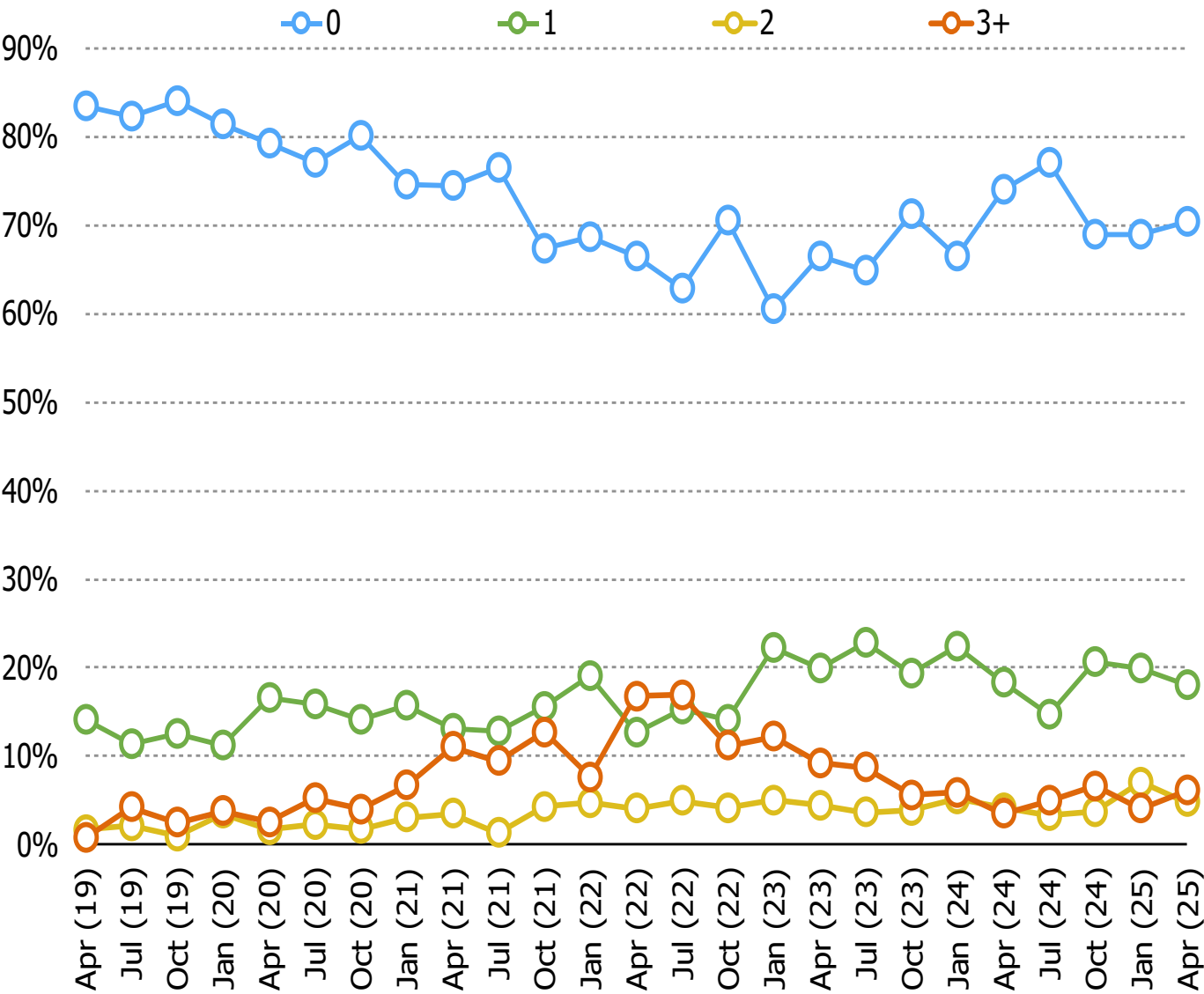
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



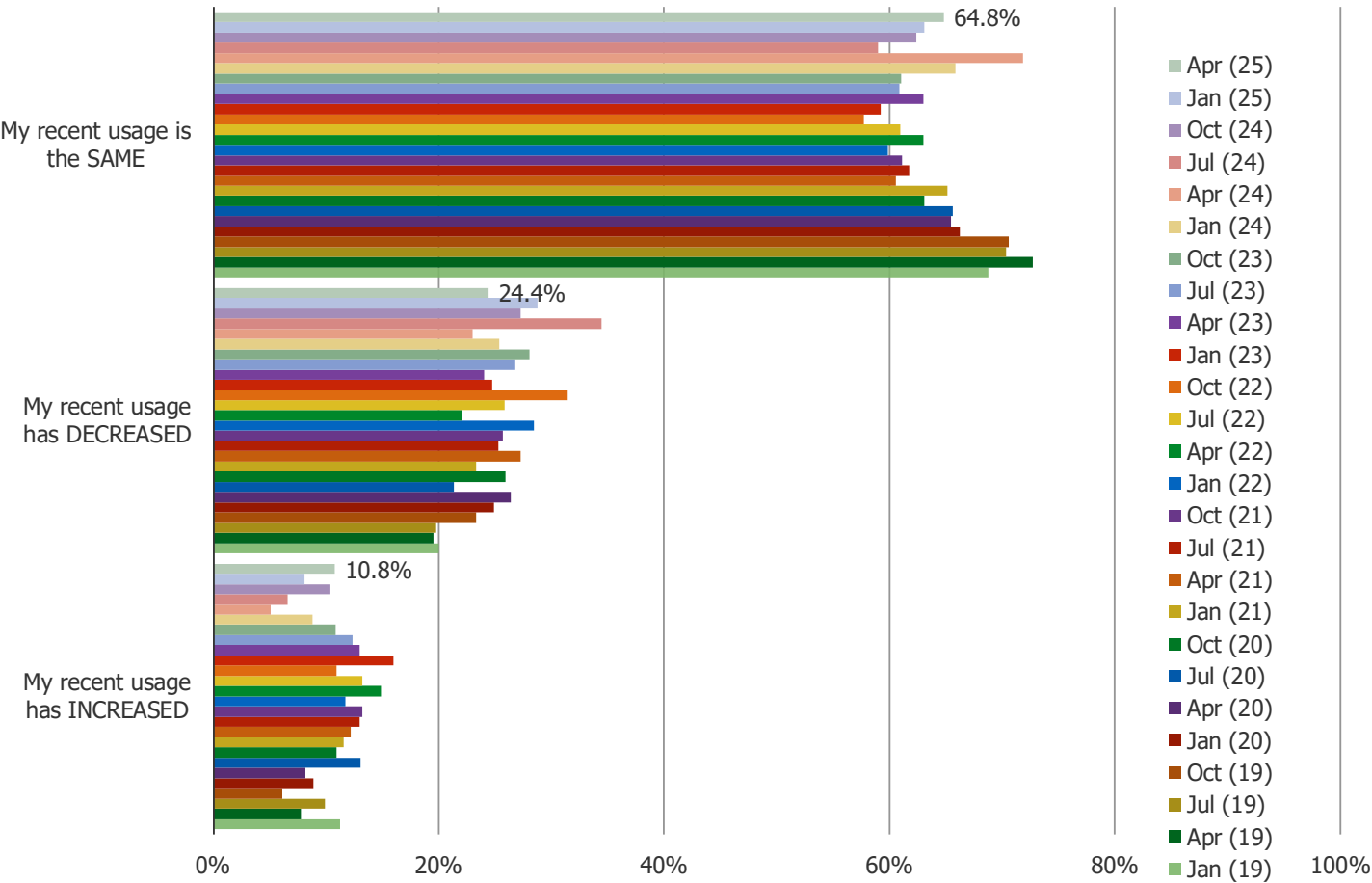
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?



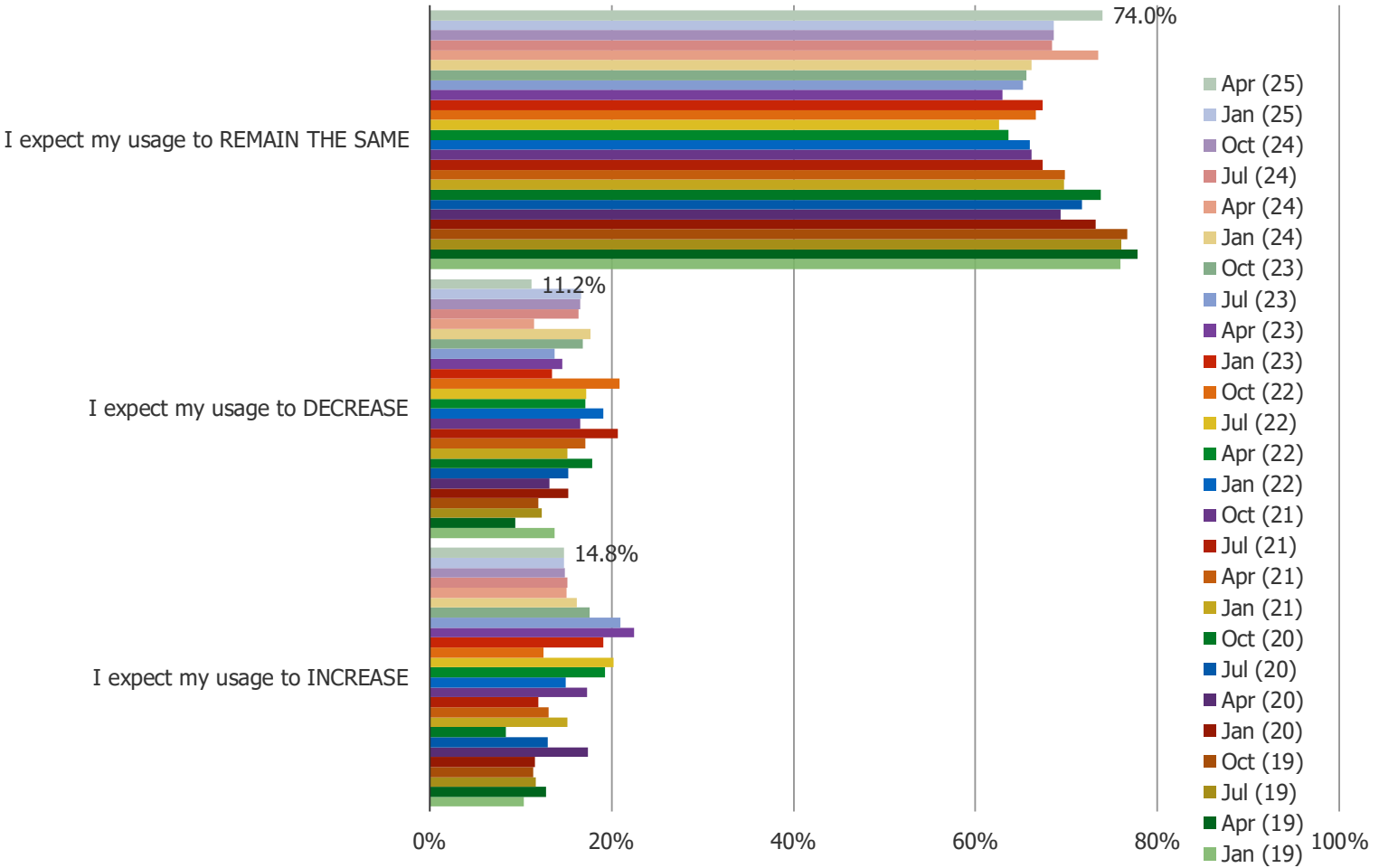
WAYFAIR USERS - ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



WAYFAIR USERS – RECENT USAGE



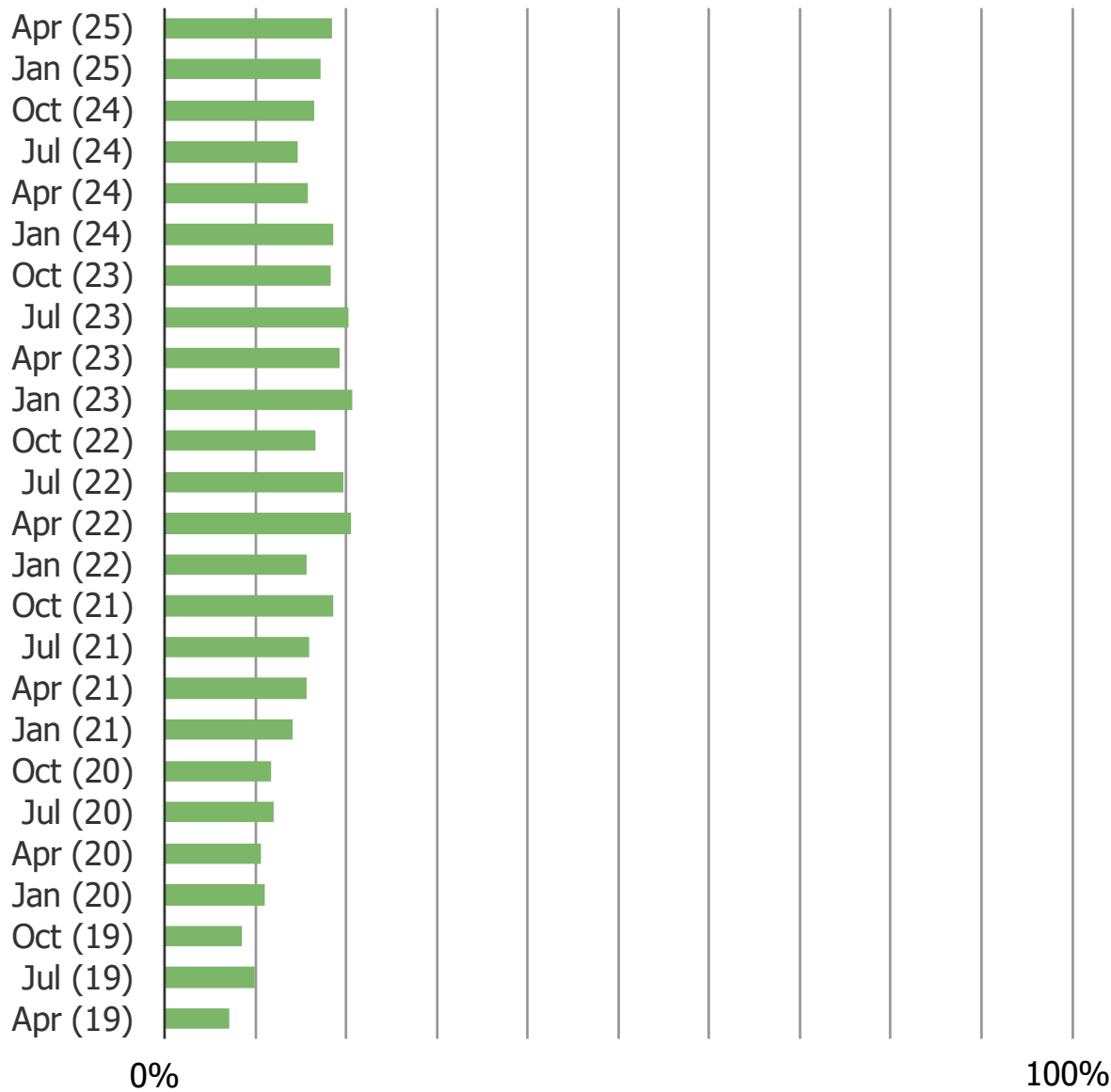
WAYFAIR USERS – EXPECTED USAGE



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

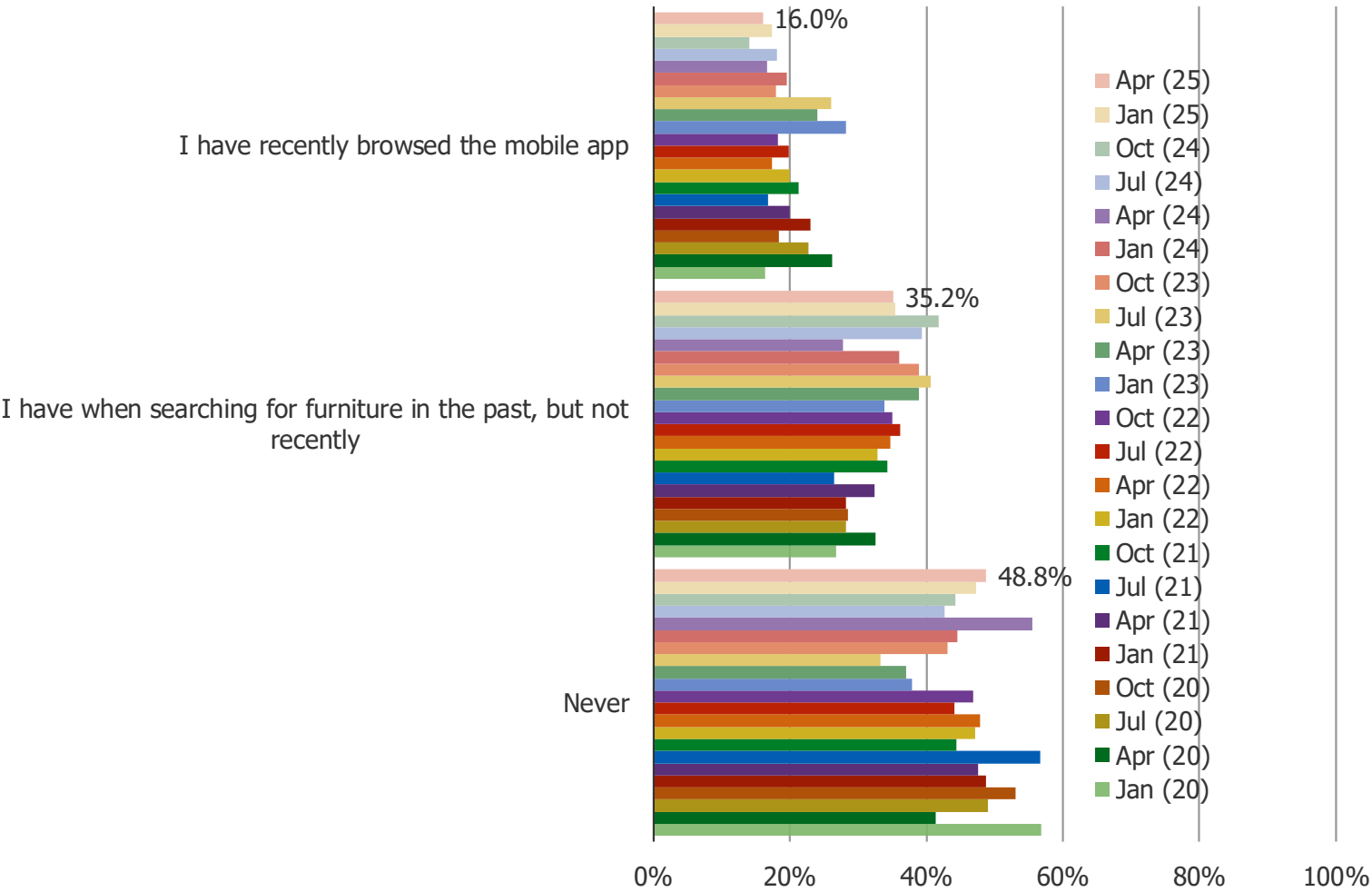
Posed to Wayfair users.

Weighted Average of responses...



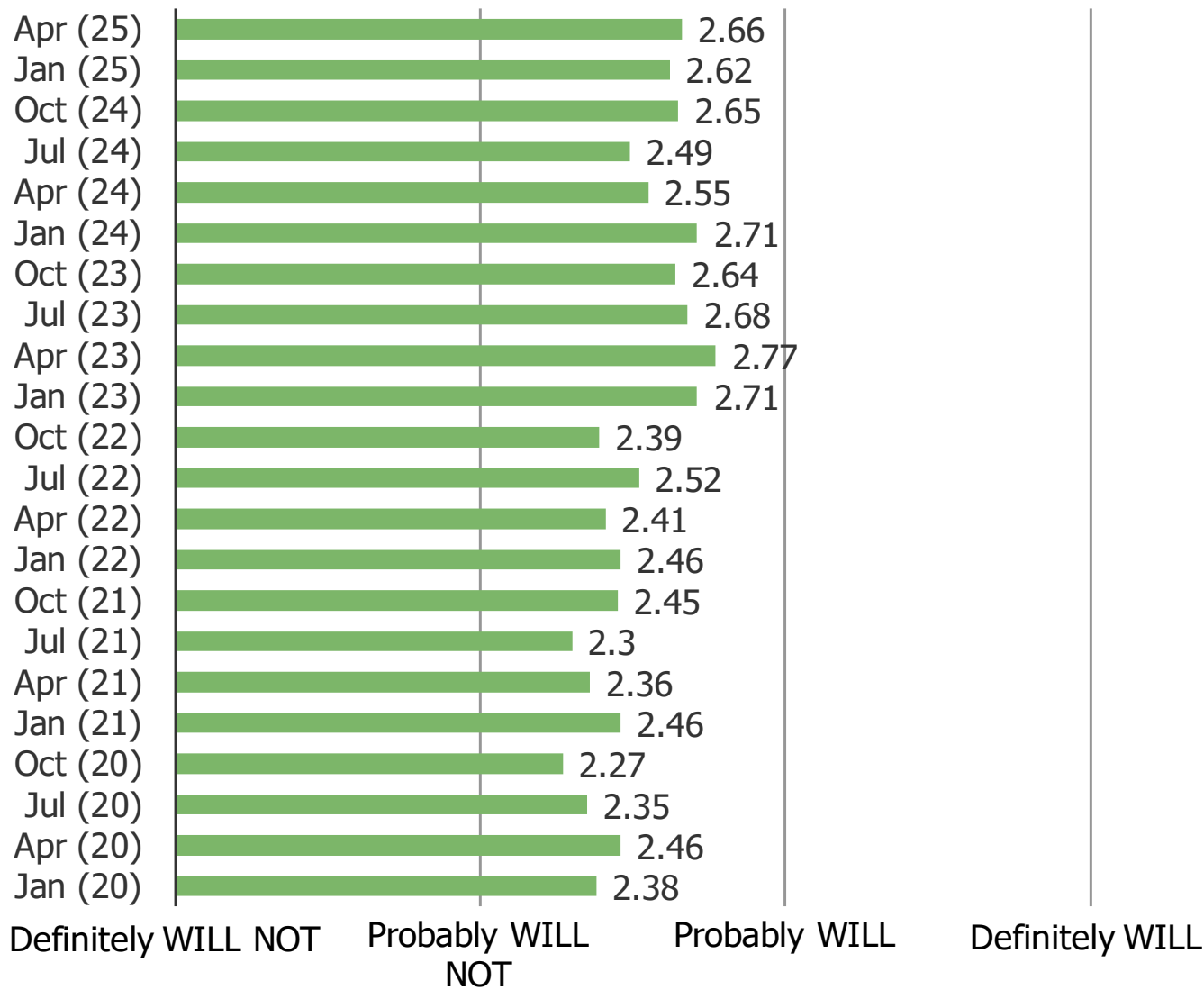
HAVE YOU EVER BROWSED THE WAYFAIR MOBILE APP FOR ITEMS?

Posed to Wayfair users.



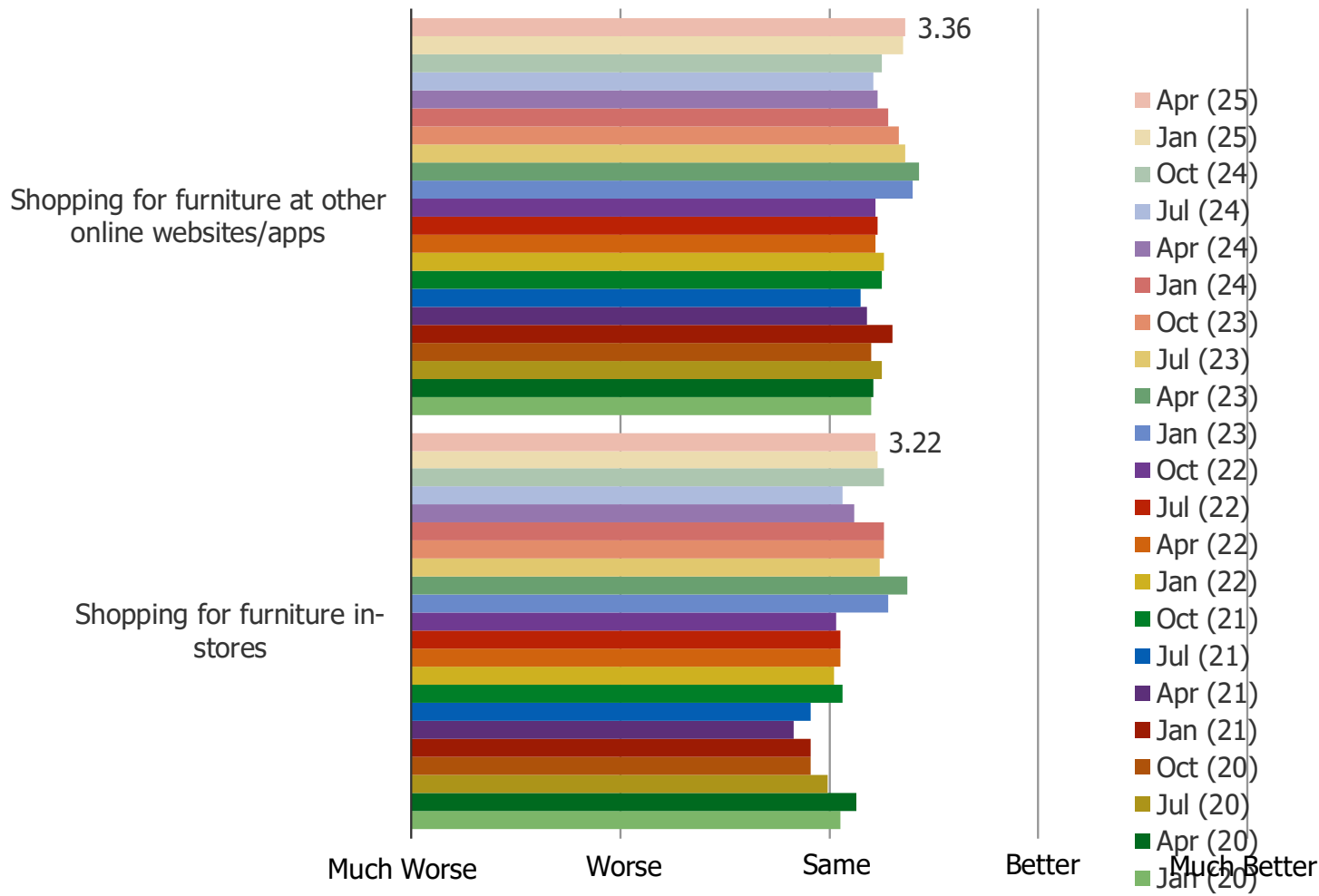
HOW LIKELY ARE YOU TO USE WAYFAIR FOR YOUR NEXT FURNITURE PURCHASE?

Posed to Wayfair users.



HOW DOES THE WAYFAIR SHOPPING EXPERIENCE COMPARE TO...

Posed to Wayfair users.

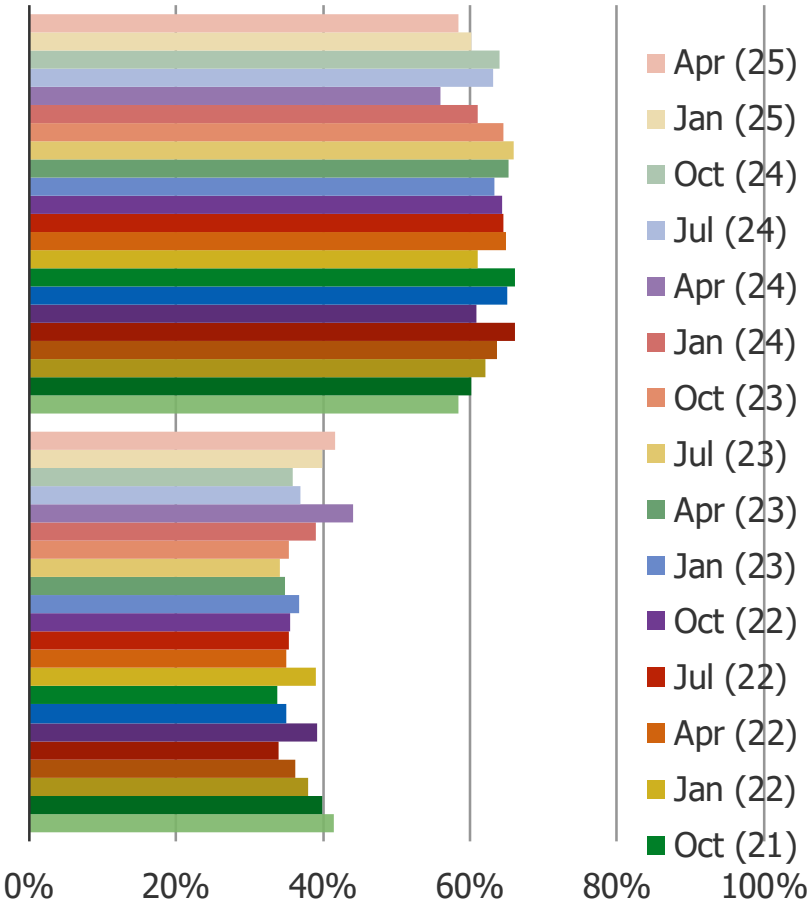


HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.

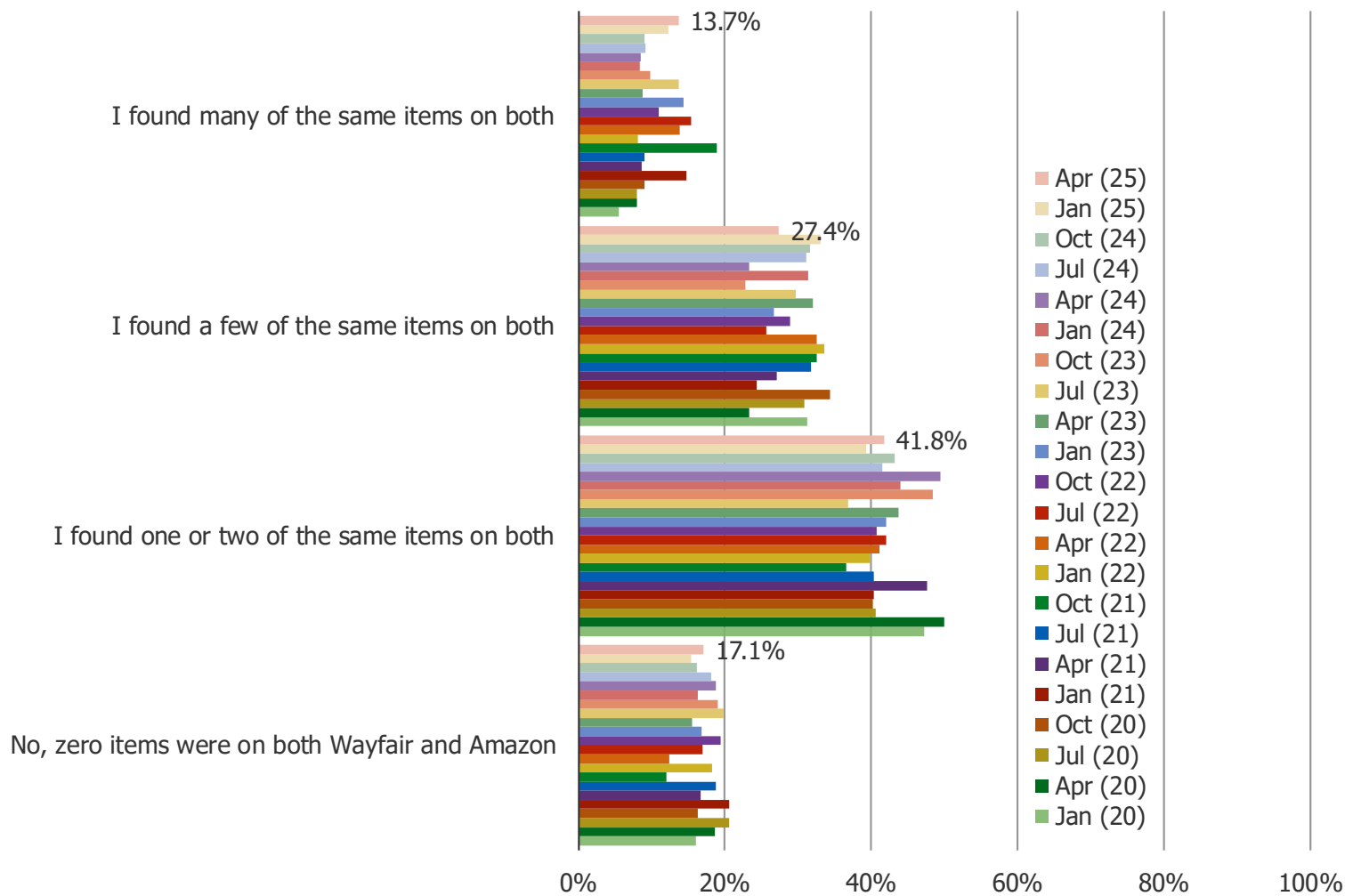
Yes, I have searched for similar furniture items on both Wayfair and Amazon

No, I have not browsed for the same item on both Wayfair and Amazon



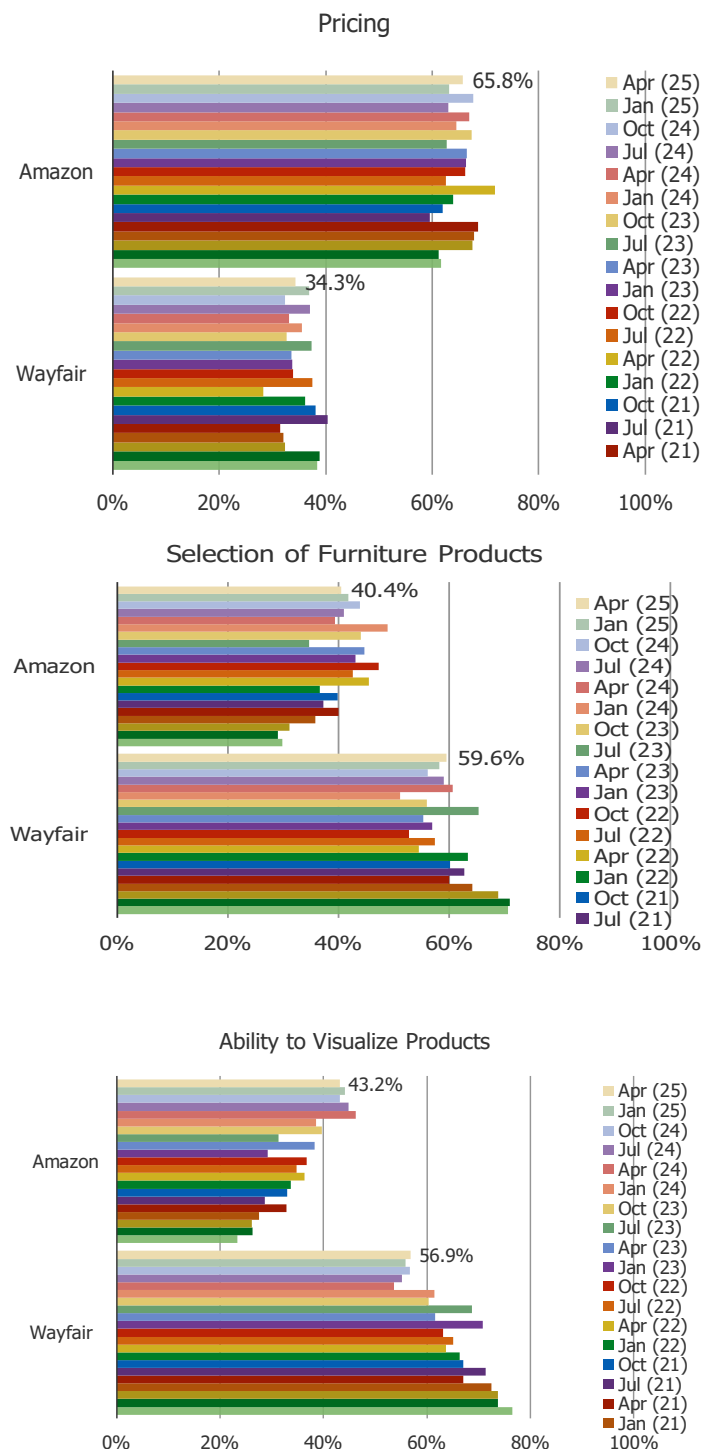
IN THE COURSE OF YOUR SEARCH, DID YOU FIND ANY ITEMS THAT WERE IDENTICAL AND LISTED ON BOTH WAYFAIR AND AMAZON?

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



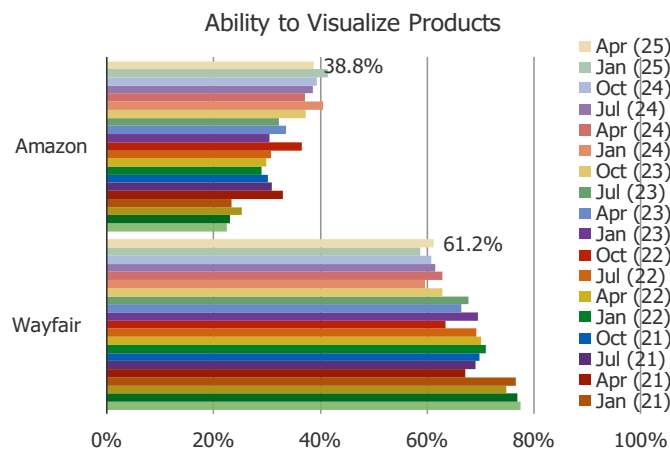
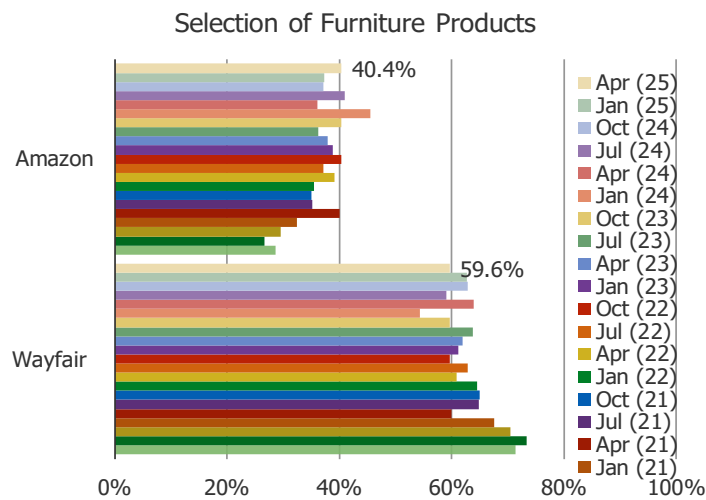
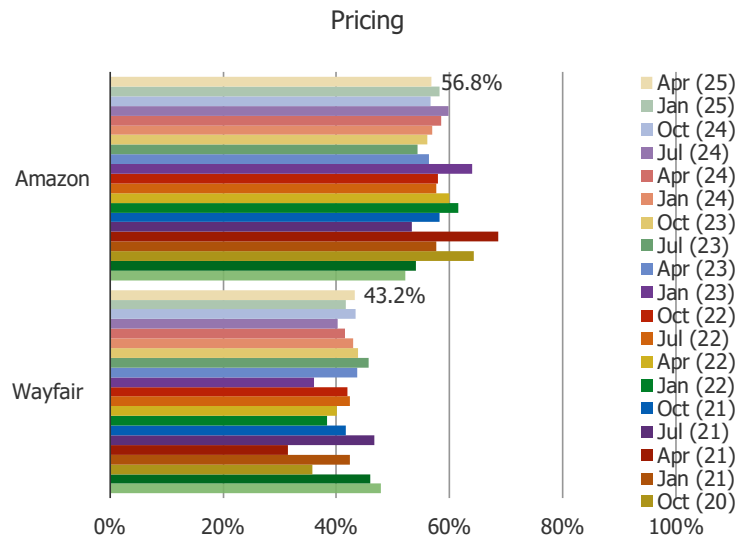
WHEN YOU WERE SHOPPING FOR THE SAME FURNITURE CATEGORY ON BOTH WAYFAIR AND AMAZON, WHICH PLATFORM HAD BETTER...

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



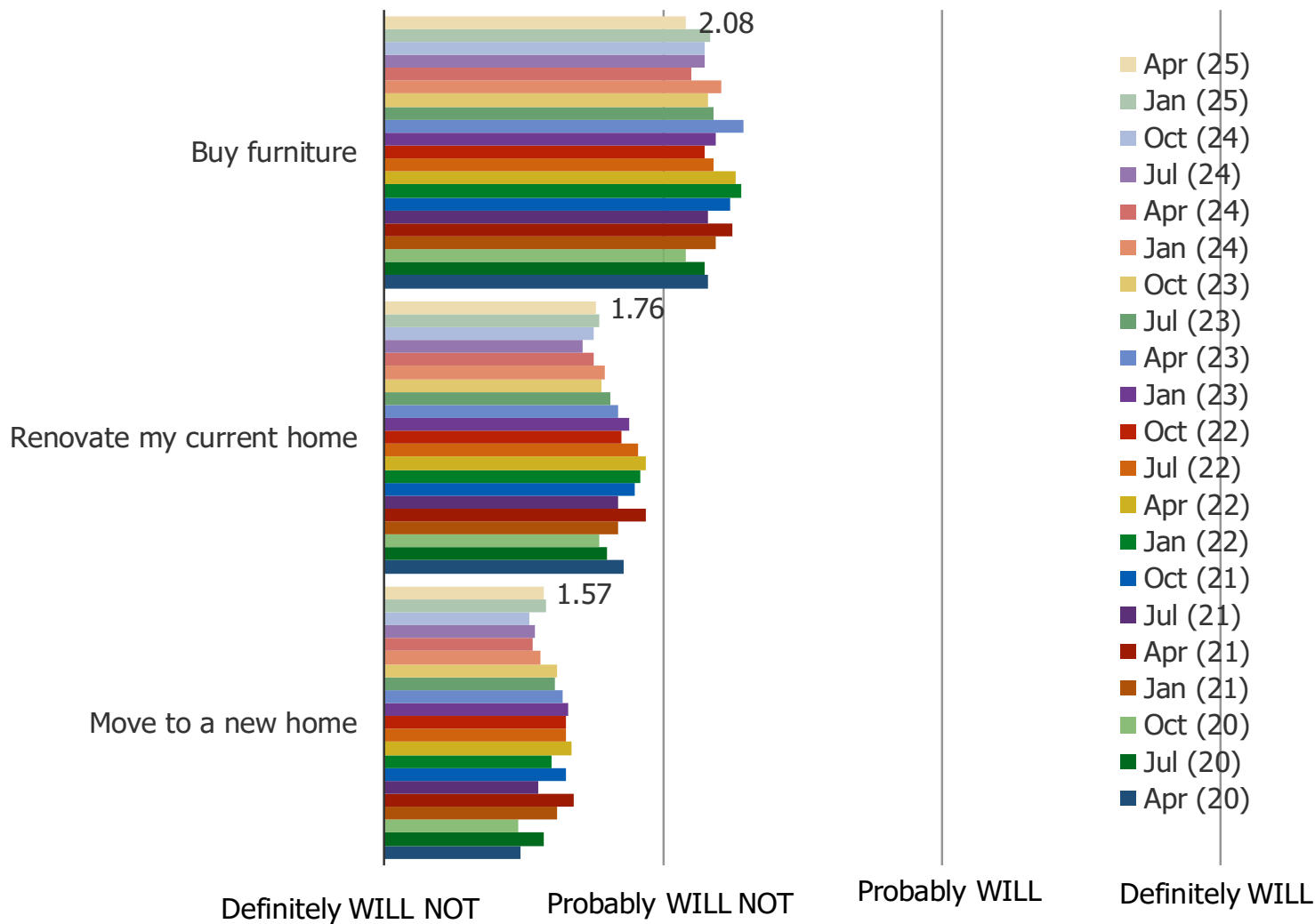
IF YOU NEEDED TO SHOP FOR A TYPE OF FURNITURE TODAY, WHICH PLATFORM DO YOU THINK WOULD HAVE BETTER...

Posed to ALL Wayfair users.



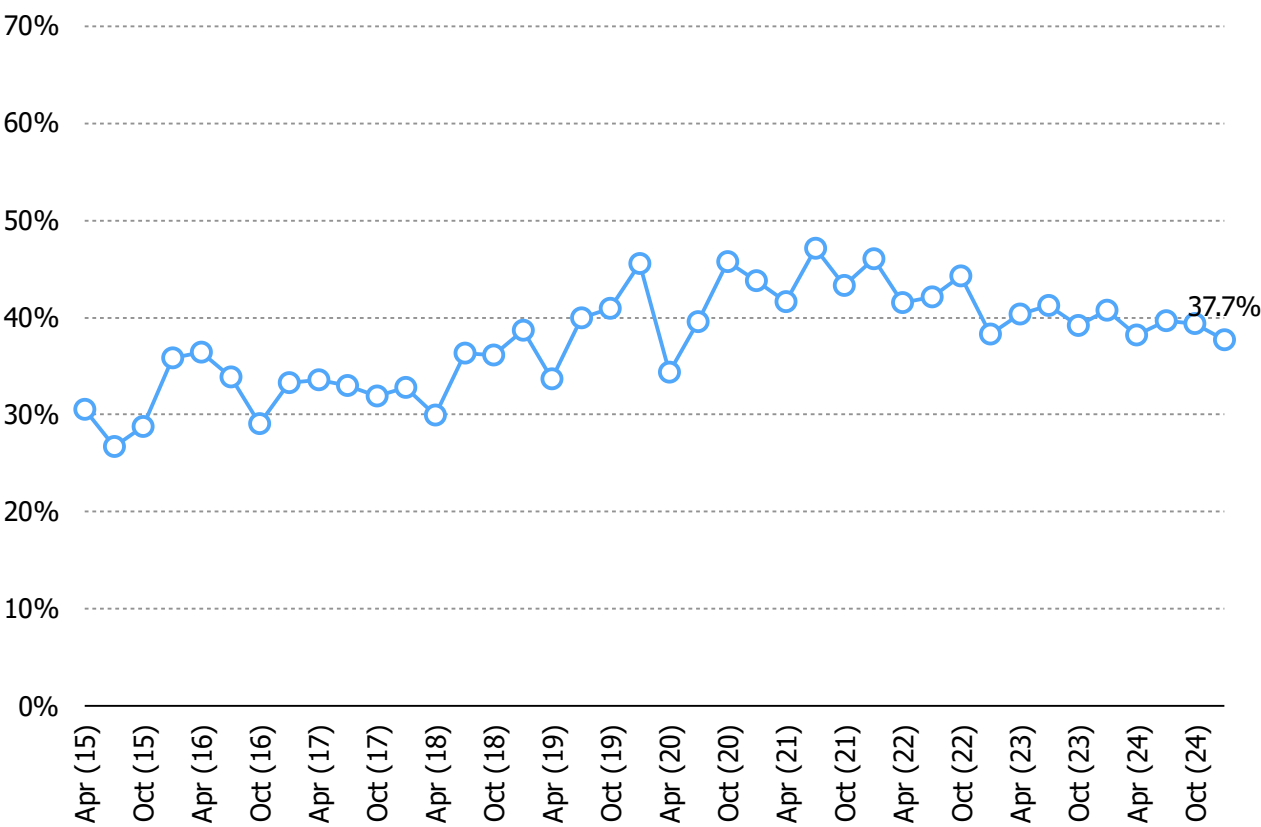
DO YOU PLAN TO DO ANY OF THE FOLLOWING IN THE NEXT FEW MONTHS?

Posed to ALL respondents.

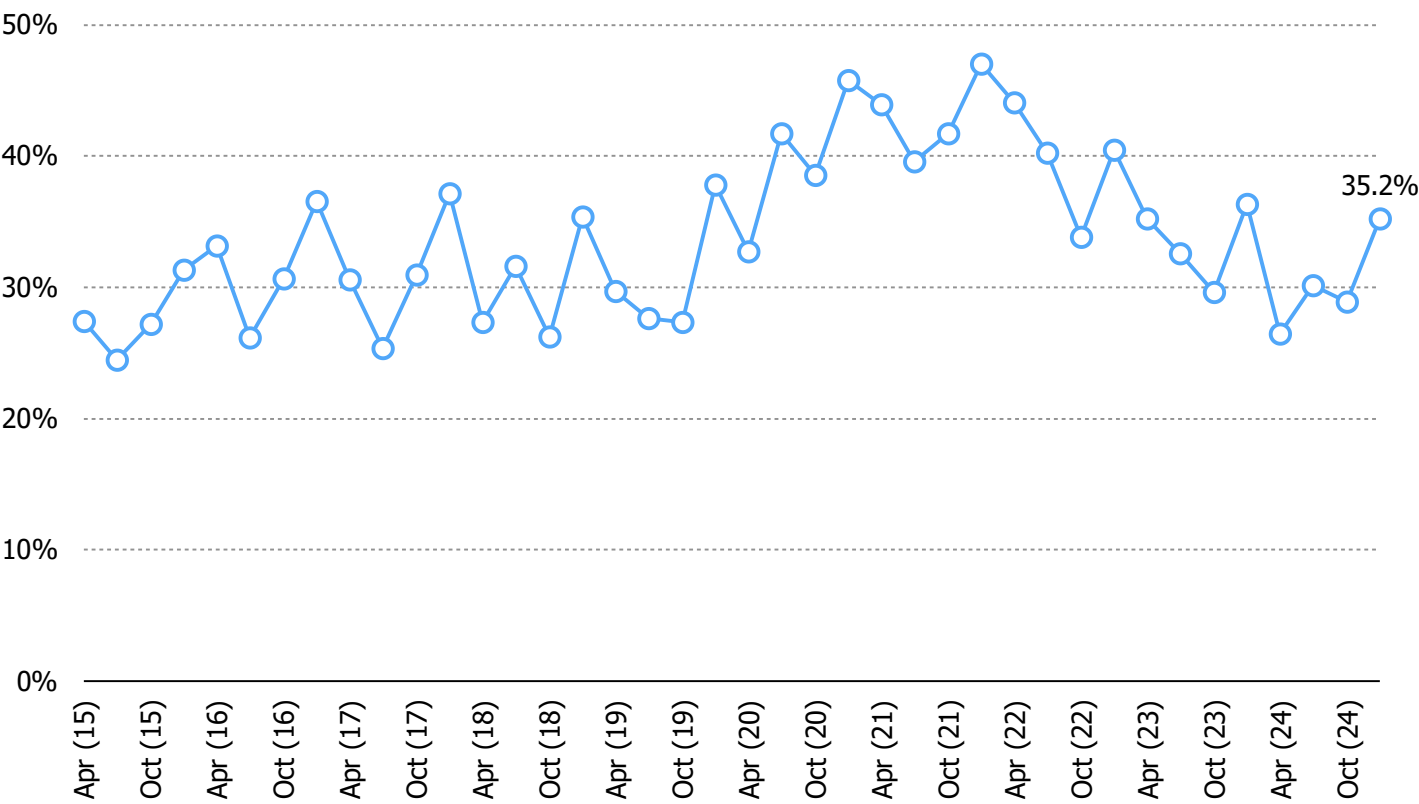


ETSY TRENDS

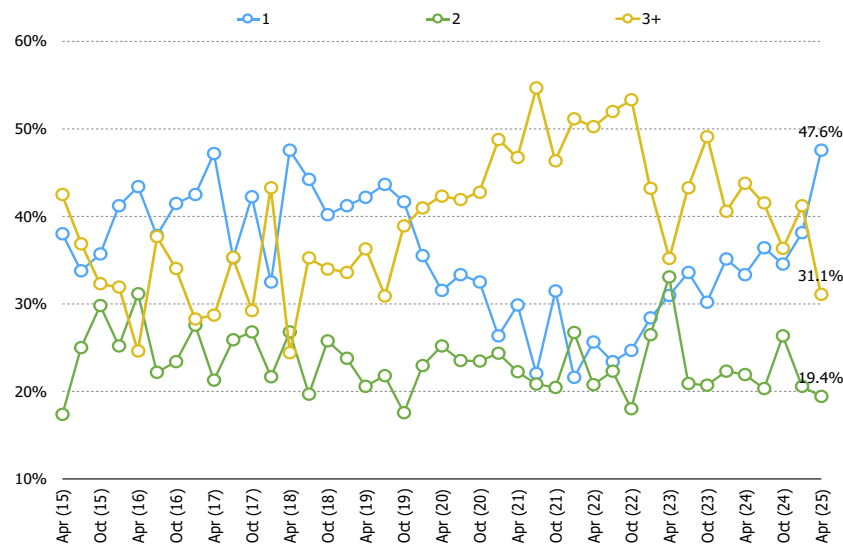
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



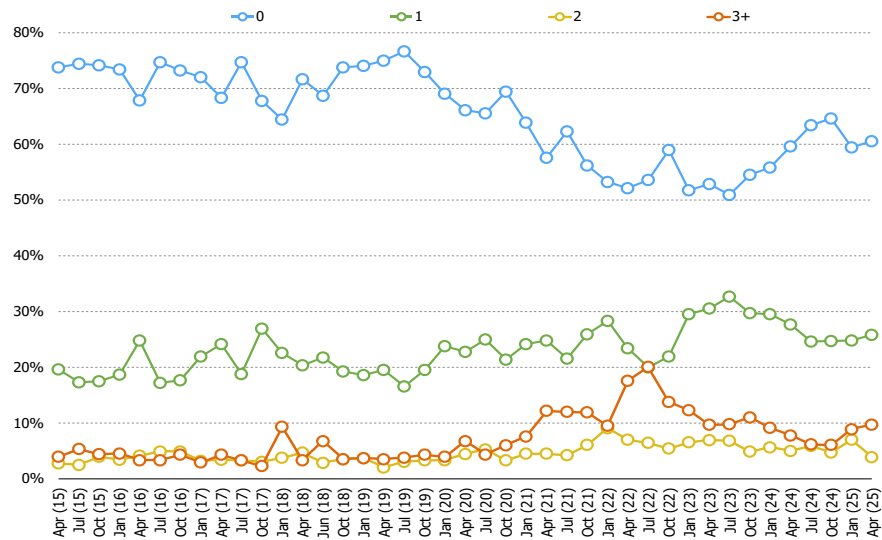
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



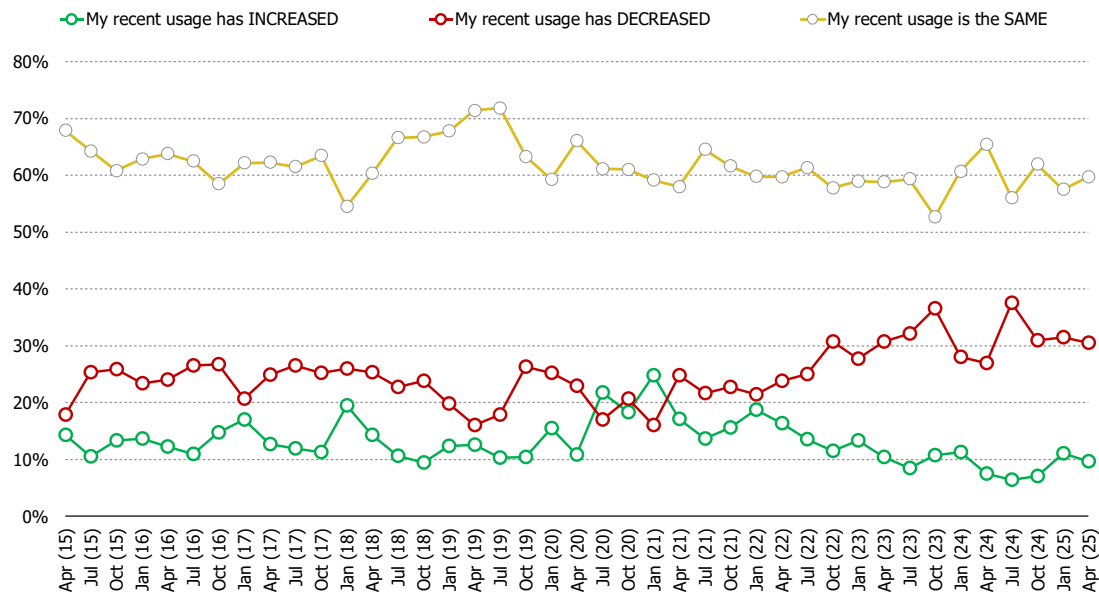
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



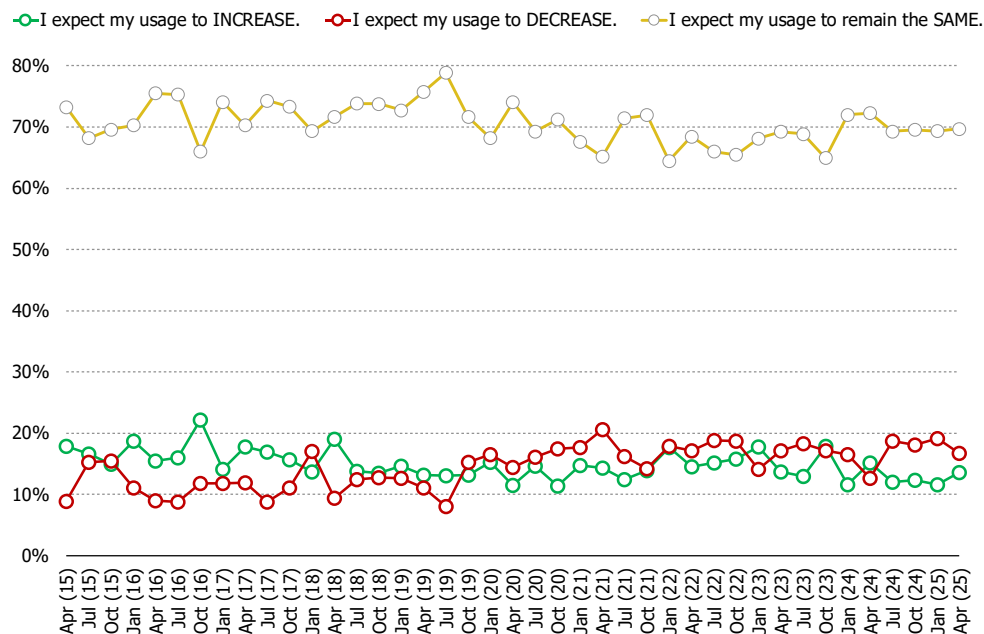
ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH



ETSY USERS – RECENT USAGE

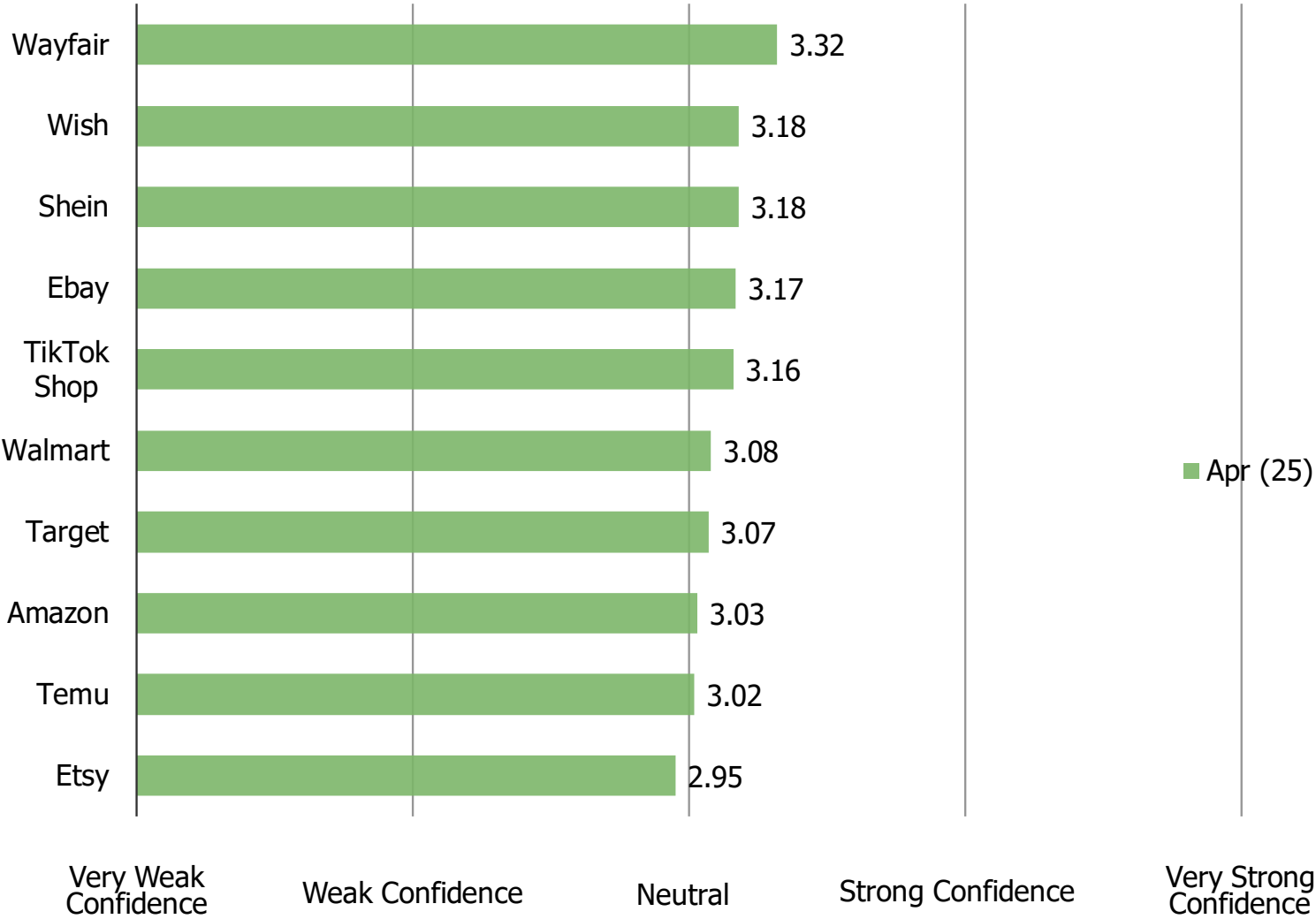


ETSY USERS – EXPECTED USAGE



CROSS-TAB ANALYSIS

CURRENT SPENDING CONFIDENCE OVERALL...

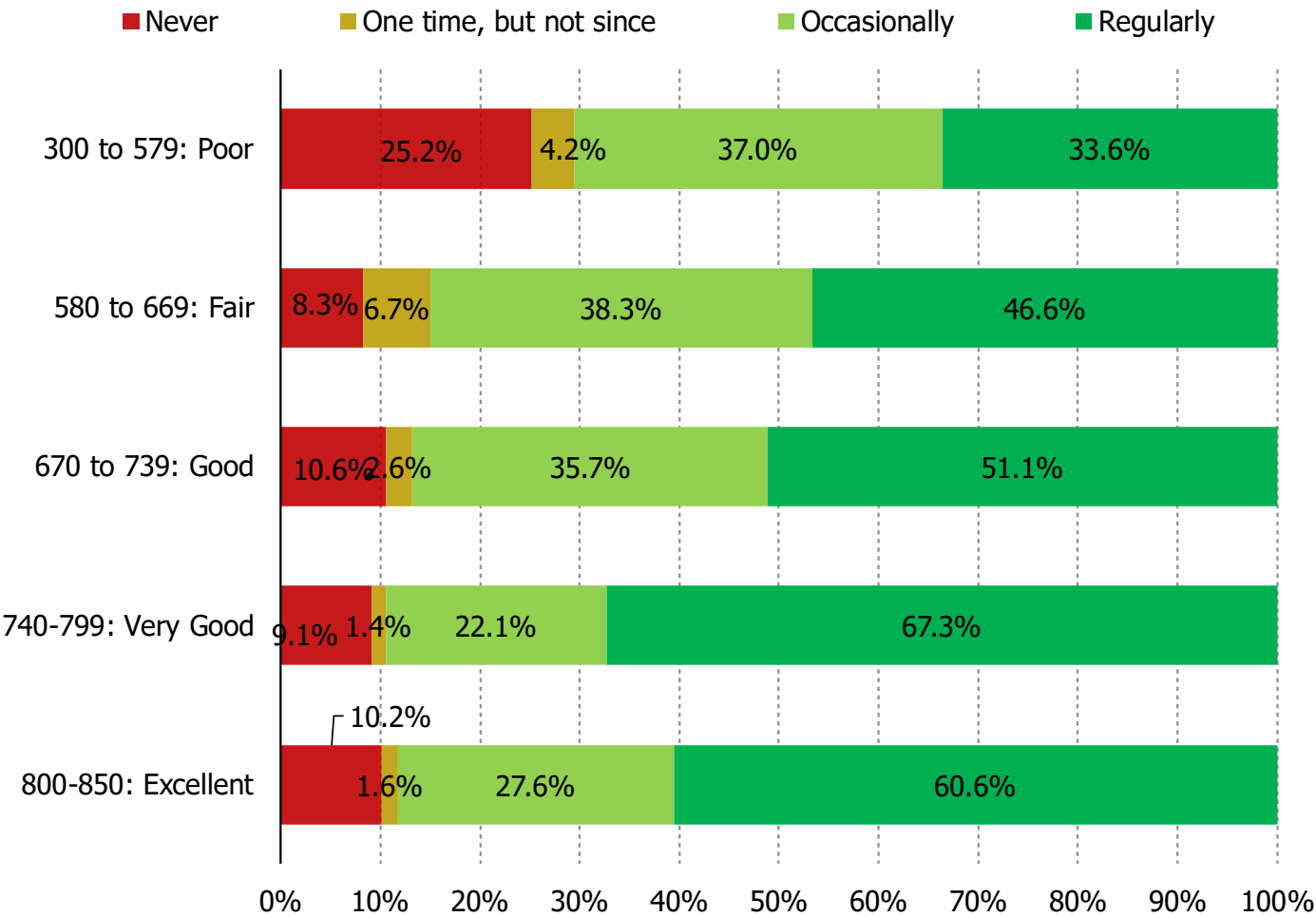


* This chart filters respondents who occasionally or regularly shop each of the above and shows how confident these respondents currently feel overall in spending money.

Experience with Amazon – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2025

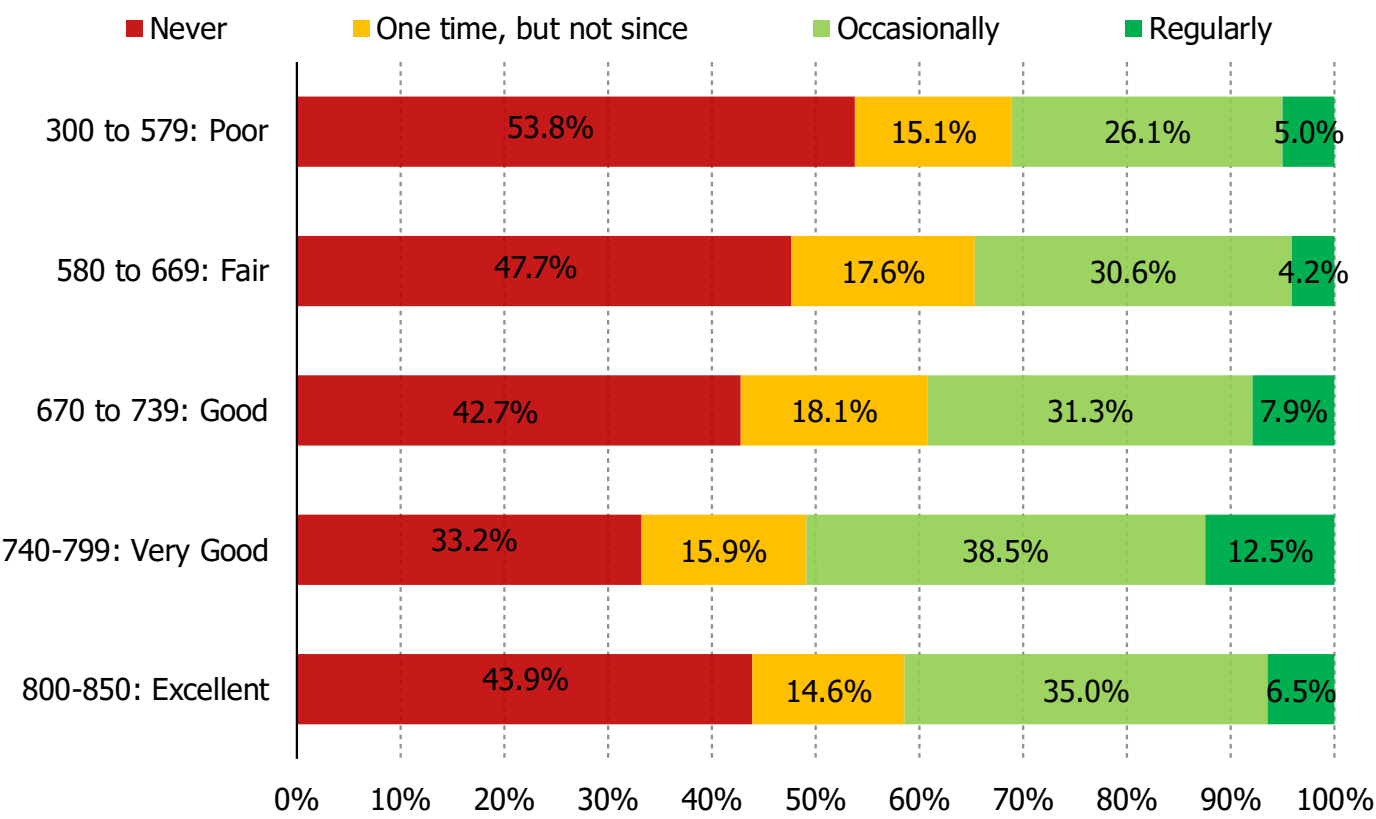


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with eBay – Purchased items...

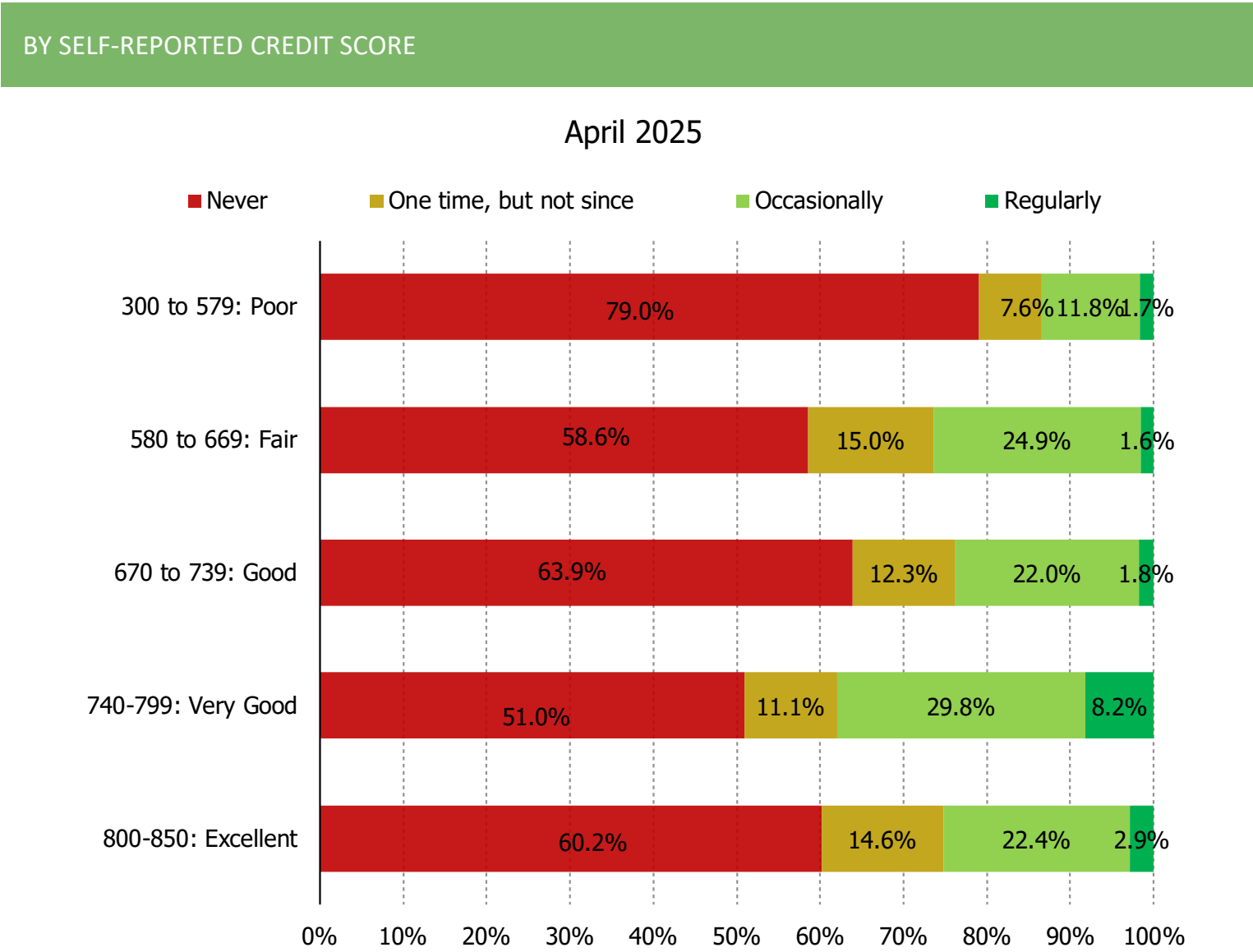
BY SELF-REPORTED CREDIT SCORE

April 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...

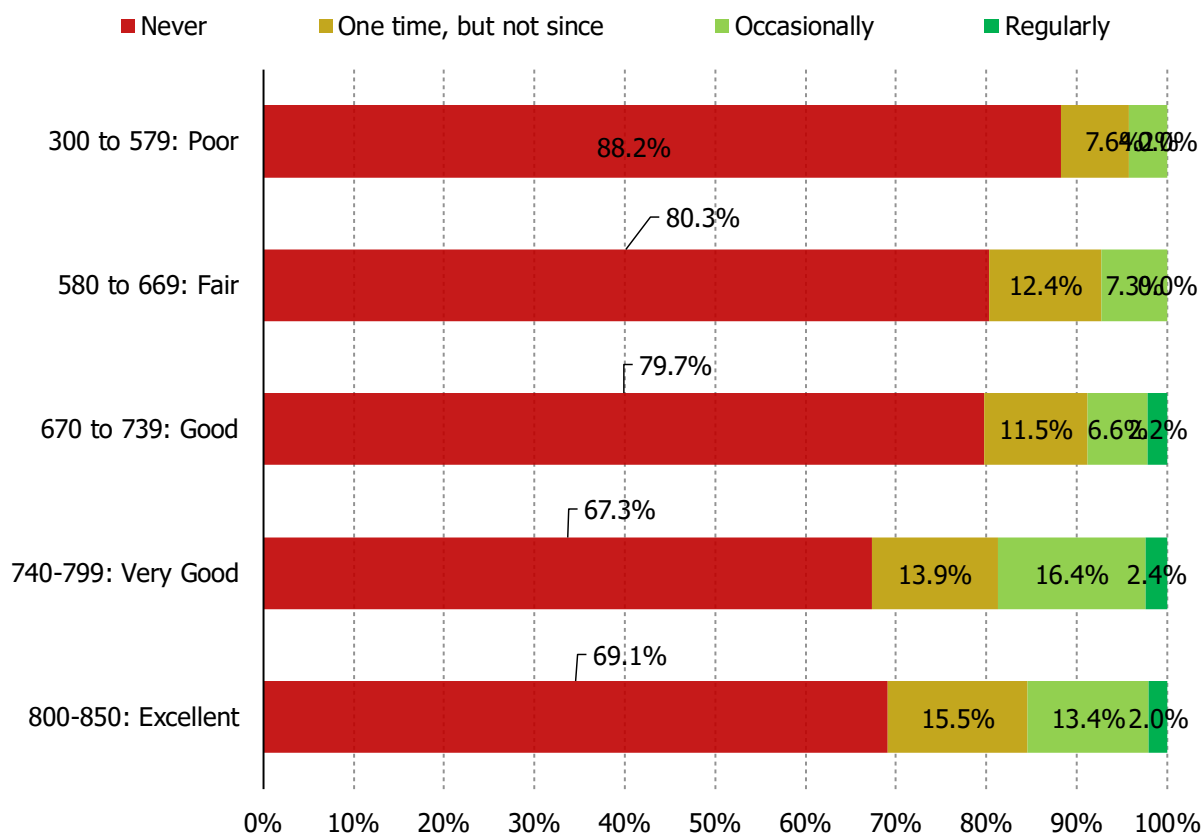


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Overstock – Purchased items...

BY SELF-REPORTED CREDIT SCORE

April 2025

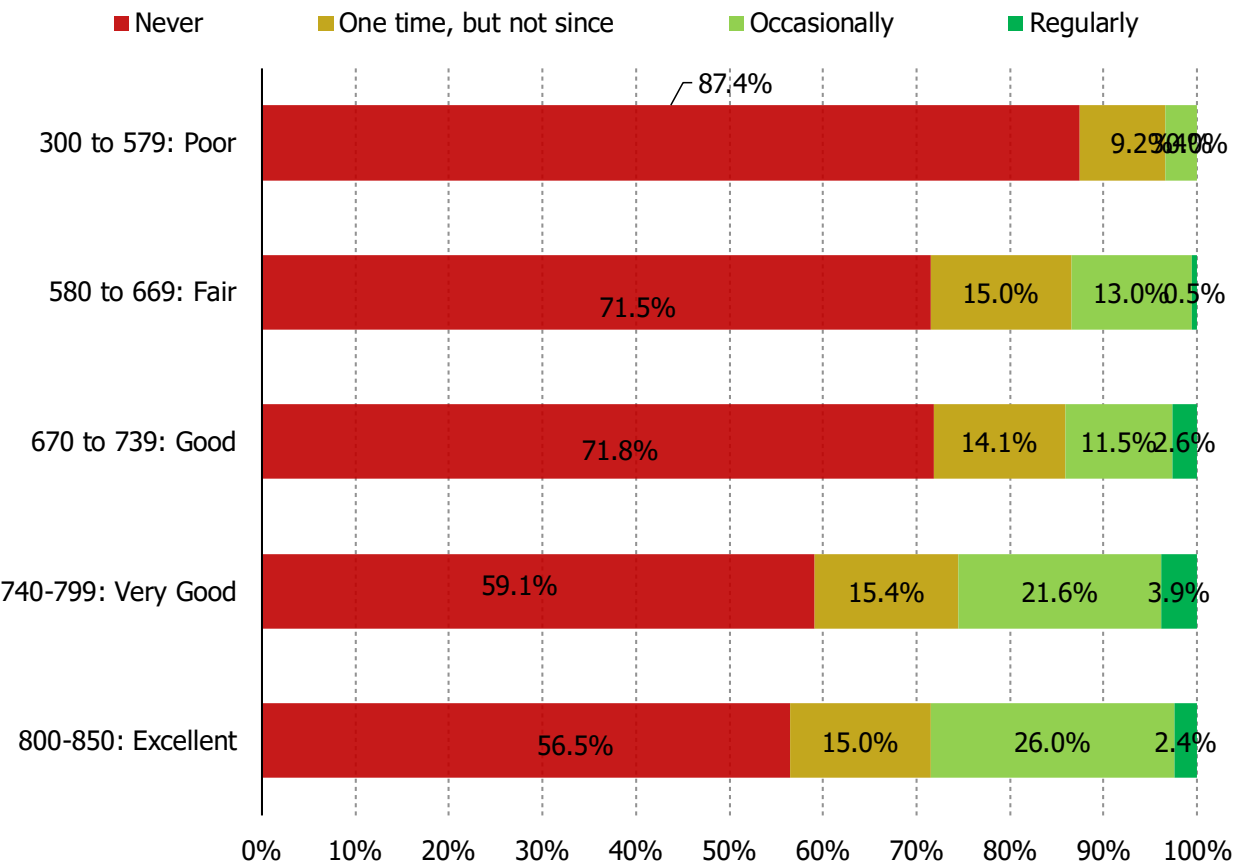


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wayfair – Purchased items...

BY SELF-REPORTED CREDIT SCORE

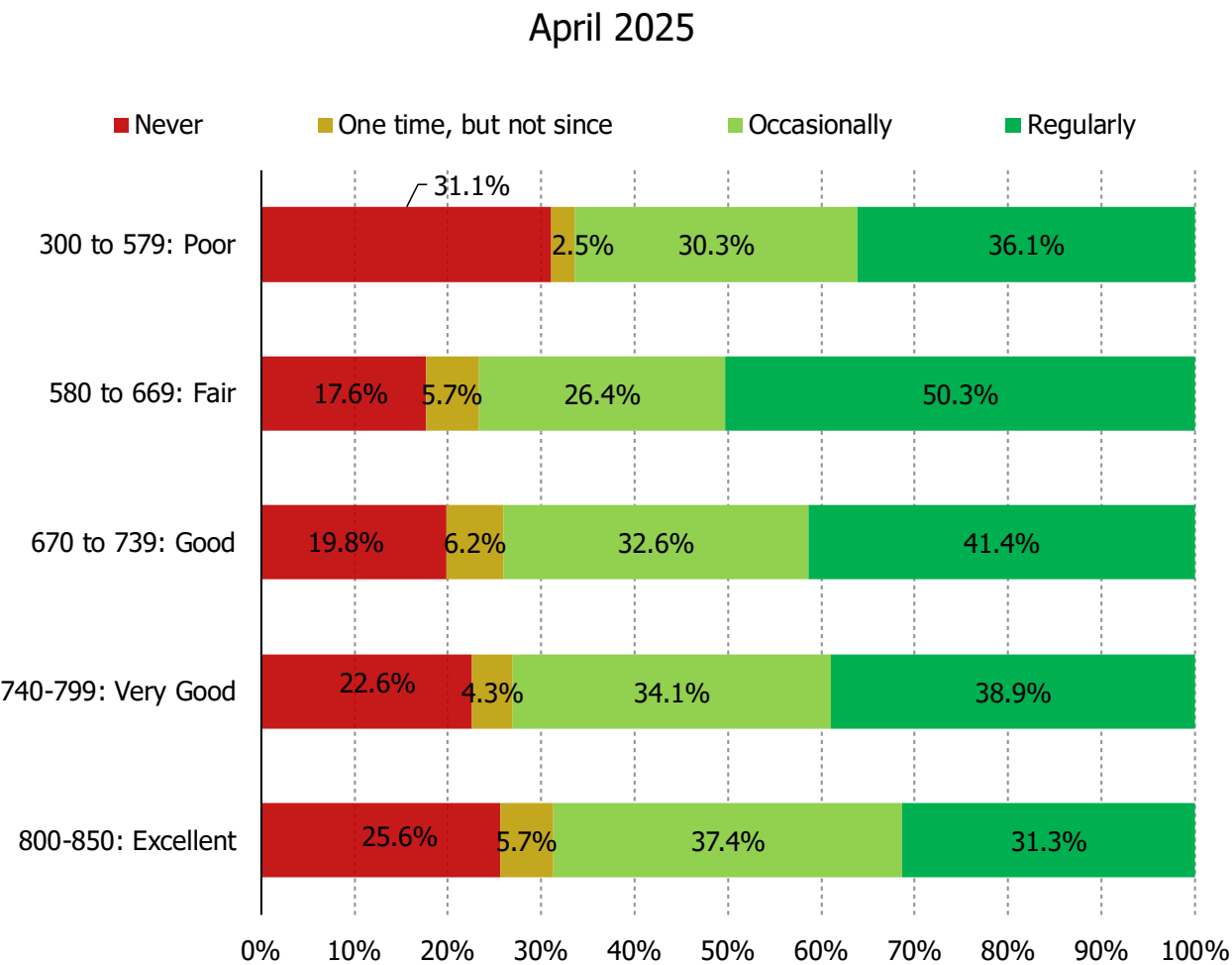
April 2025



*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.

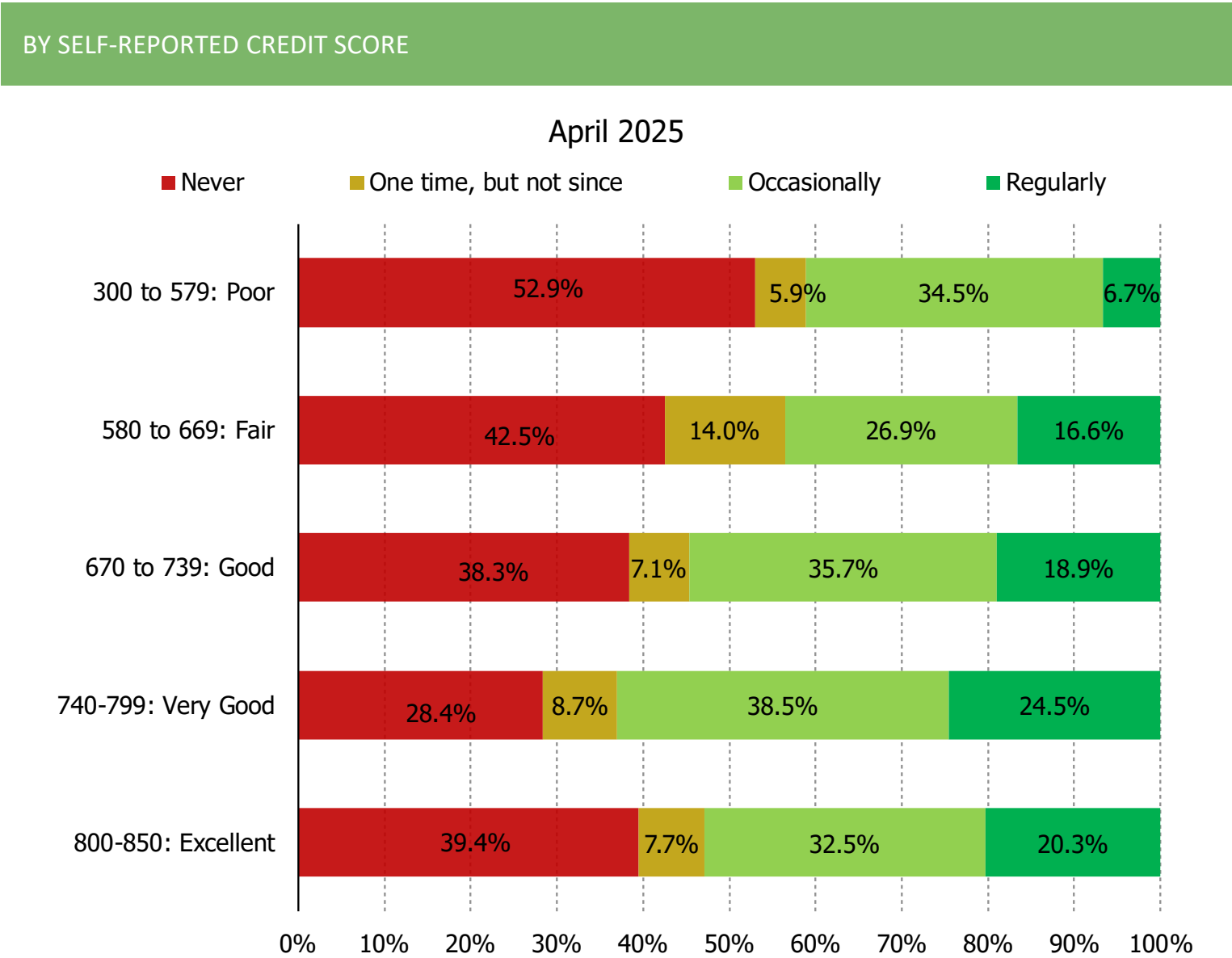
Experience with Wal-Mart – Purchased items...

BY SELF-REPORTED CREDIT SCORE



*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.

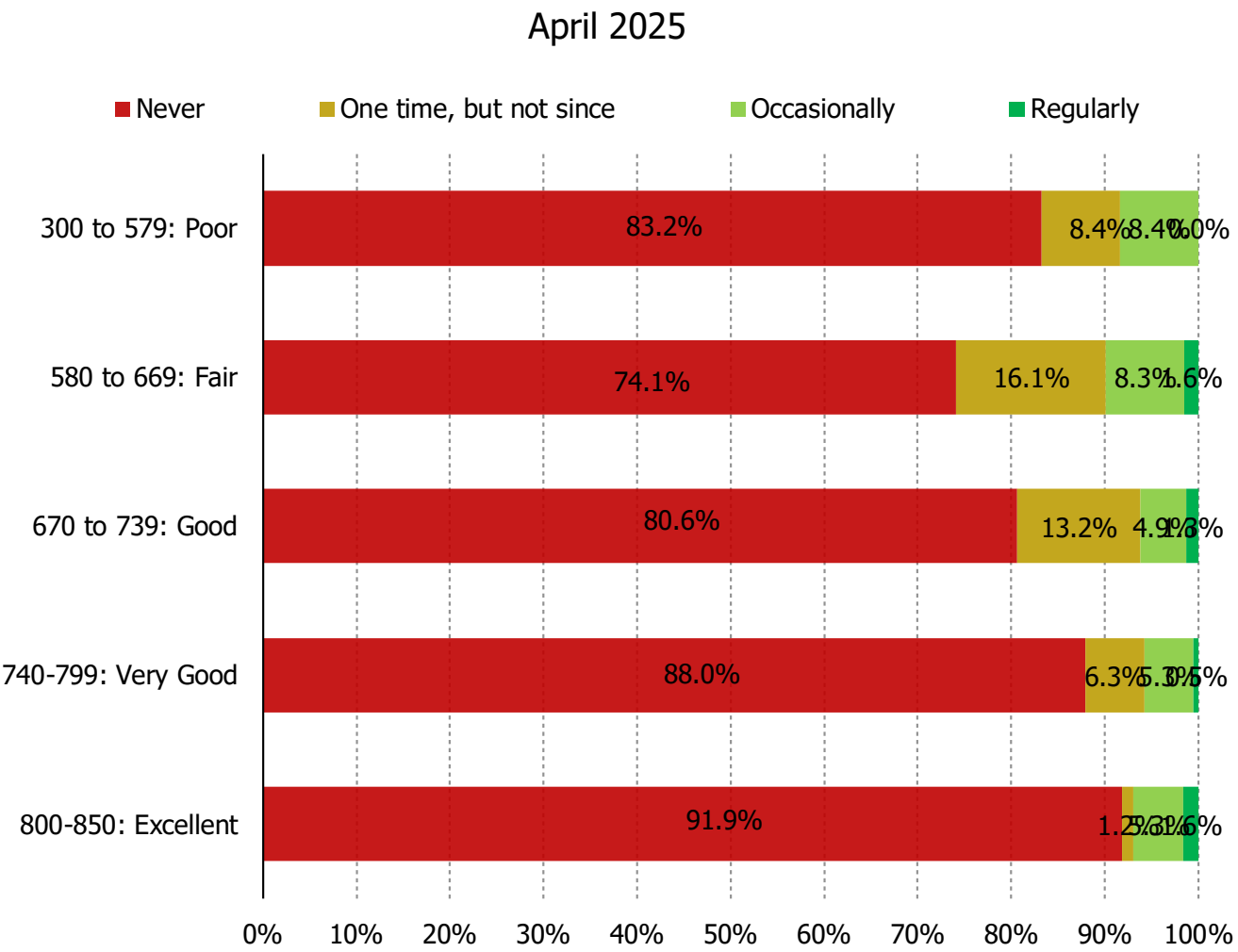
Experience with Target – Purchased items...



*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

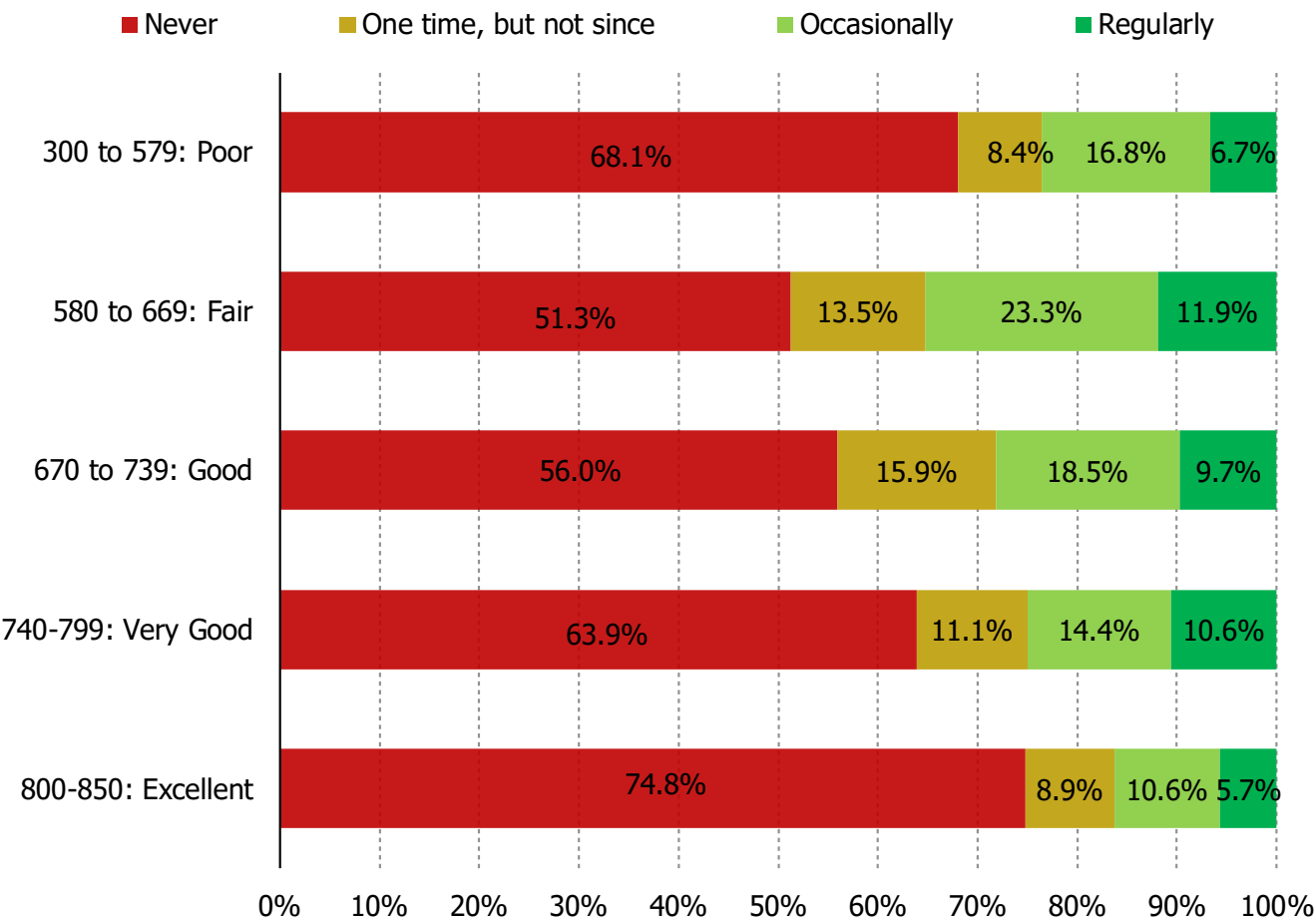


*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Temu – Purchased items...

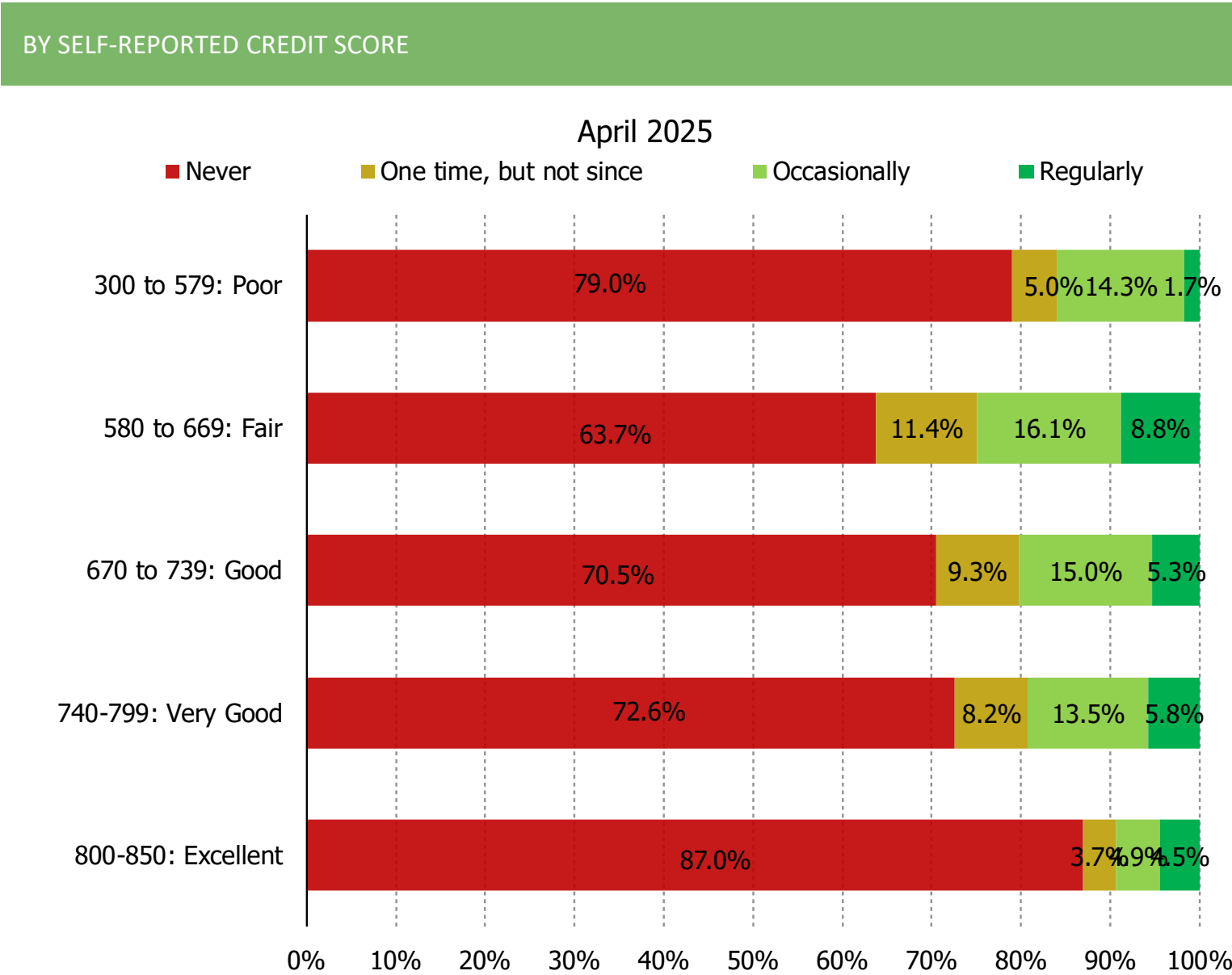
BY SELF-REPORTED CREDIT SCORE

April 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.

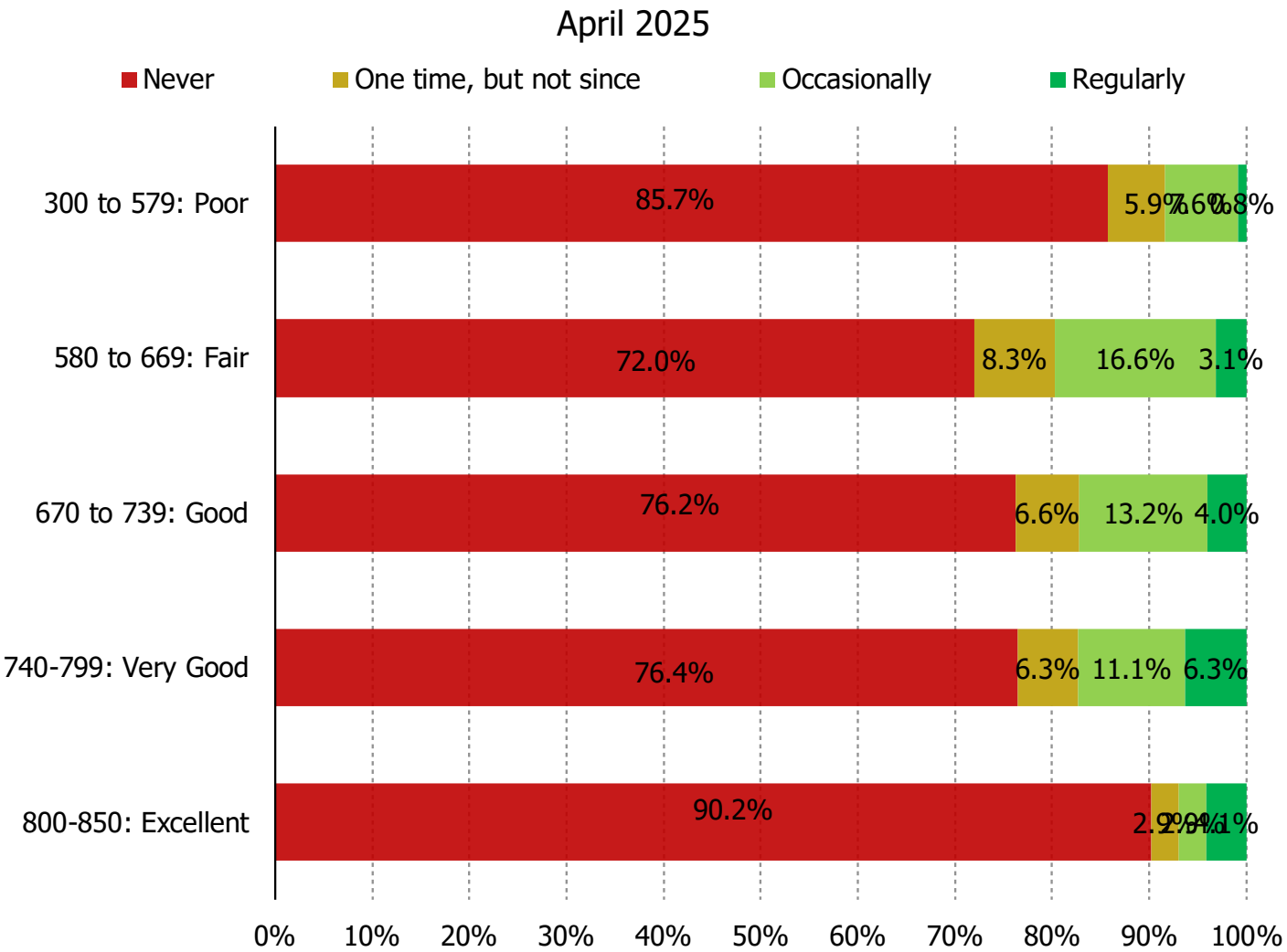
Experience with Shein – Purchased items...



*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



*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.