

# Bespoke Survey Research

July 2025

## Online Retailers

Volume 50 | Quarterly Survey

1,000 US Consumers Balanced To Census

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

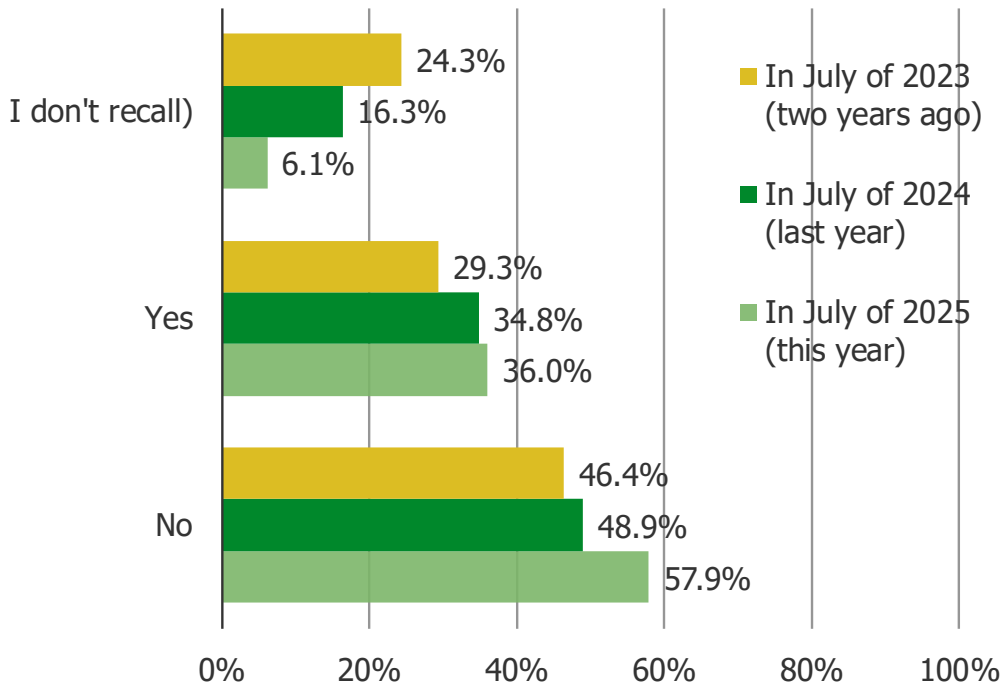
### **Key Takeaways:**

- ☐ Readings of consumer confidence have improved q/q in our tracker and are in-line with recent history (but a touch below what we saw 2-3 years ago).
- ☐ We launched this survey toward the very end of Prime Day. Factoring out those who didn't remember if they shopped Prime Day each year, a slightly lower percentage of consumers said they shopped Prime this year vs. last.
- ☐ 23% of consumers said they noticed more discounts or promotions from retailers other than Amazon, with the top two being called out: Wal-Mart and Target.
- ☐ The share of those who have browsed or contemplated buying furniture from Wayfair who view it as no riskier to buy from than physical stores increased q/q (the share who view Wayfair as riskier declined q/q). Wayfair shoppers continue to tell us that a verified stamp would make them feel like purchasing the item would be less risky.
- ☐ On net, we continue to get feedback from Etsy customers that they think the search experience has improved.
- ☐ When it comes to cross-shopping Wayfair and Amazon, the share of customers who feel that Wayfair's pricing is better has increased over time (a higher percentage still think Amazon is cheaper, but Wayfair has gained in this KPI).
- ☐ The share of consumers who are planning to buy furniture, renovate their current home, and move to a new home is pretty much flat q/q but down relative to series highs reached in recent years.
- ☐ Satisfaction with Wayfair products remains high with the lion share of Wayfair customers noting they were satisfied with their past purchase.

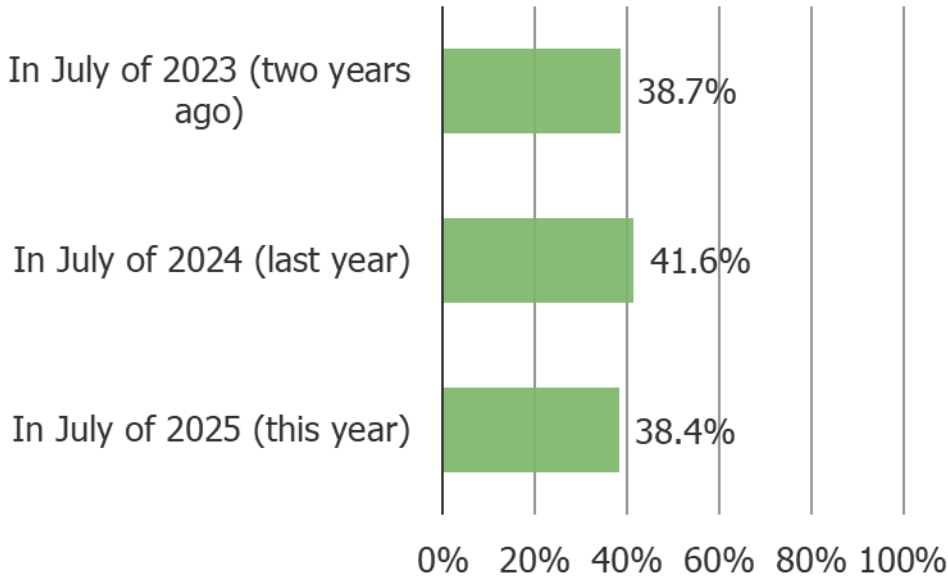
NEW AND RECENTLY ADDED QUESTIONS

DID YOU BUY ANYTHING ON AMAZON DURING AMAZON PRIME DAY DURING THE FOLLOWING YEARS?

Posed to all respondents

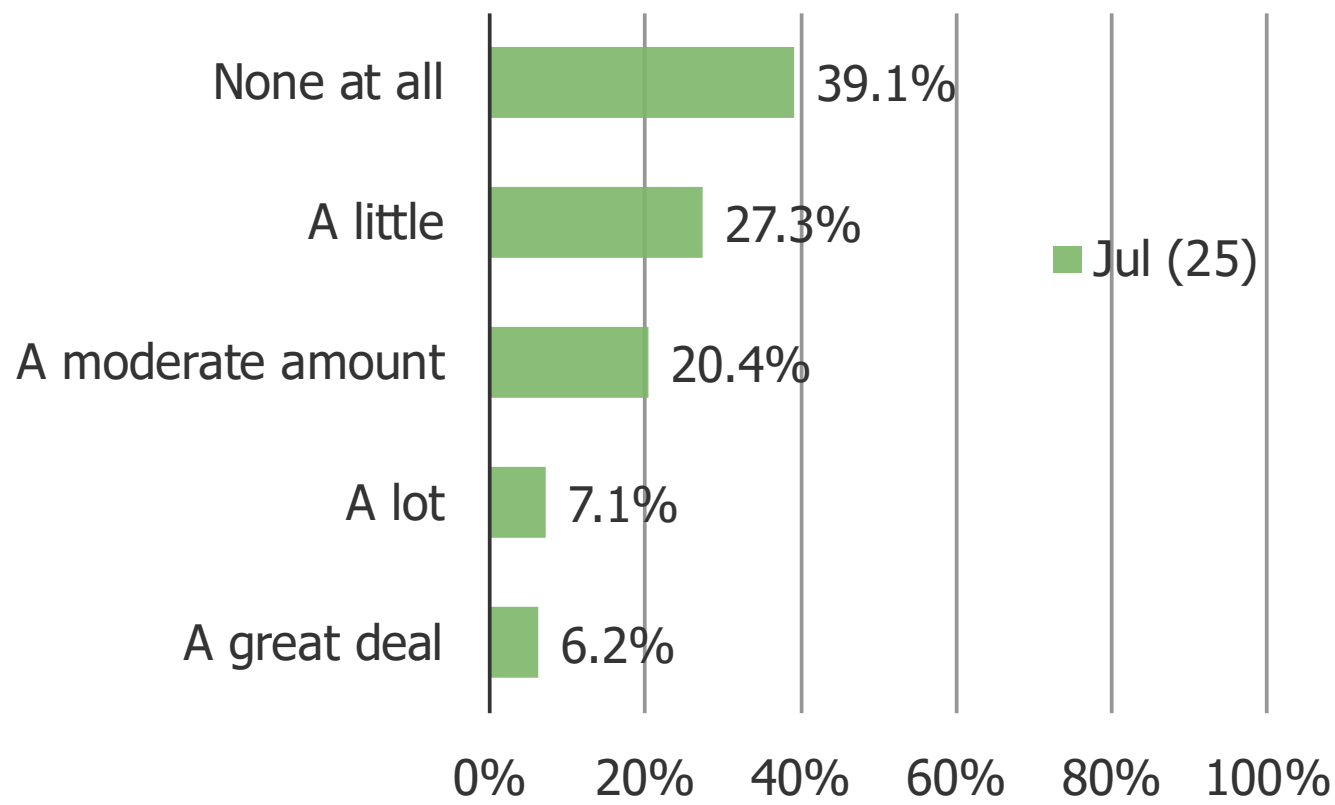


Factoring out respondents who said "I don't recall"... % Yes Charted Below



HOW MUCH TIME HAVE YOU SPENT BROWSING PRIME DAY DEALS THIS WEEK ON AMAZON?

Posed to all respondents



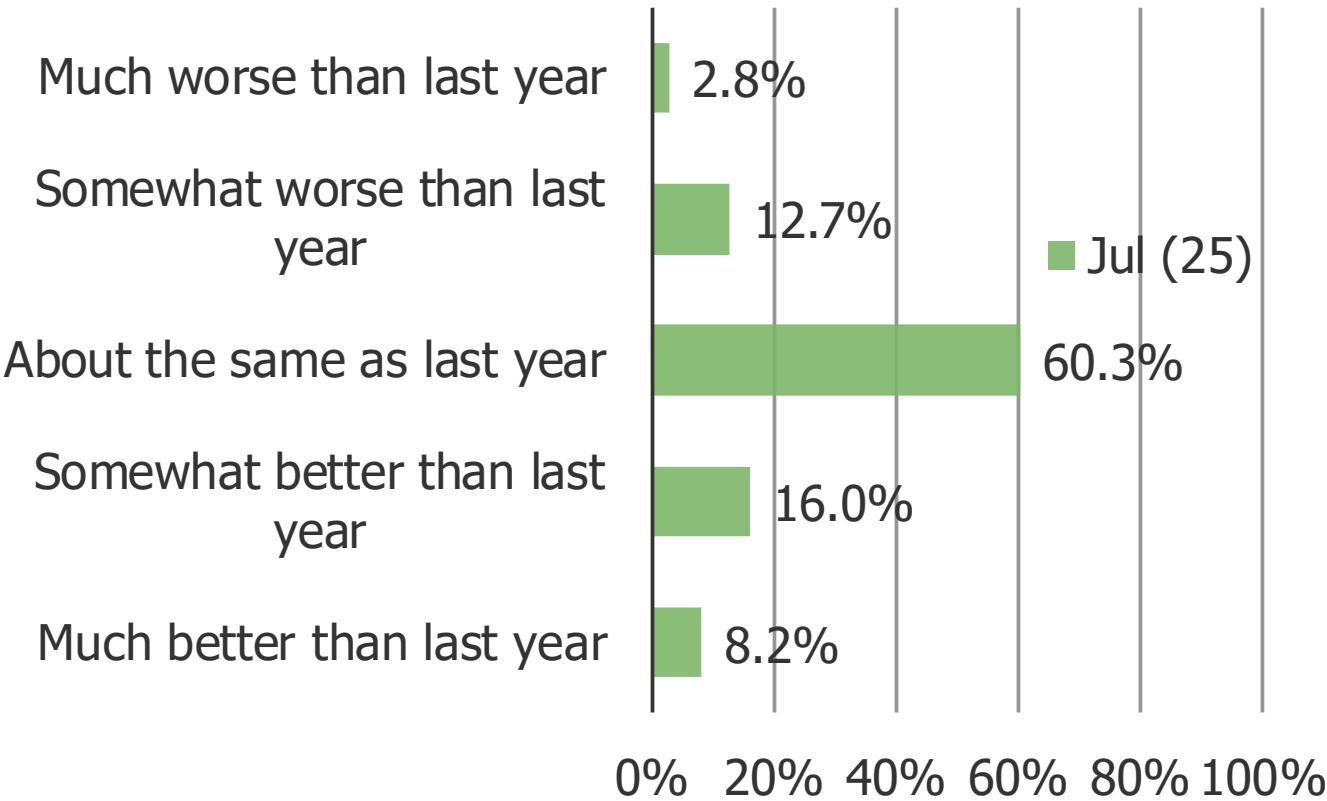
HOW WOULD YOU COMPARE YOUR LEVEL OF EXCITEMENT FOR AMAZON PRIME DAY THIS YEAR (2025) COMPARED TO PRIOR YEARS?

Posed to all respondents



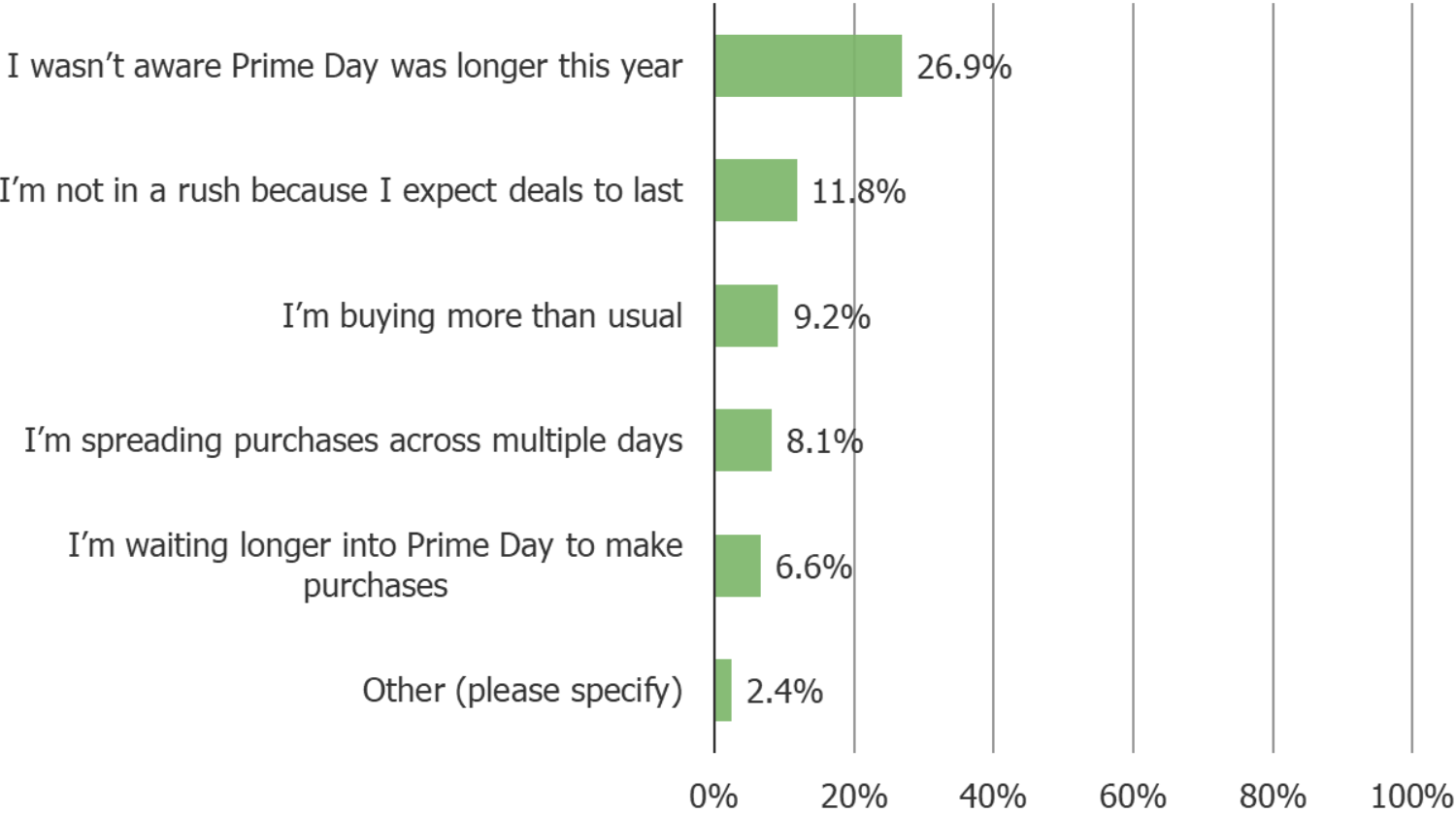
DO YOU FEEL THE DEALS ON AMAZON PRIME DAY THIS YEAR ARE...

Posed to all respondents who have spent time browsing Prime Day deals. (N=599)



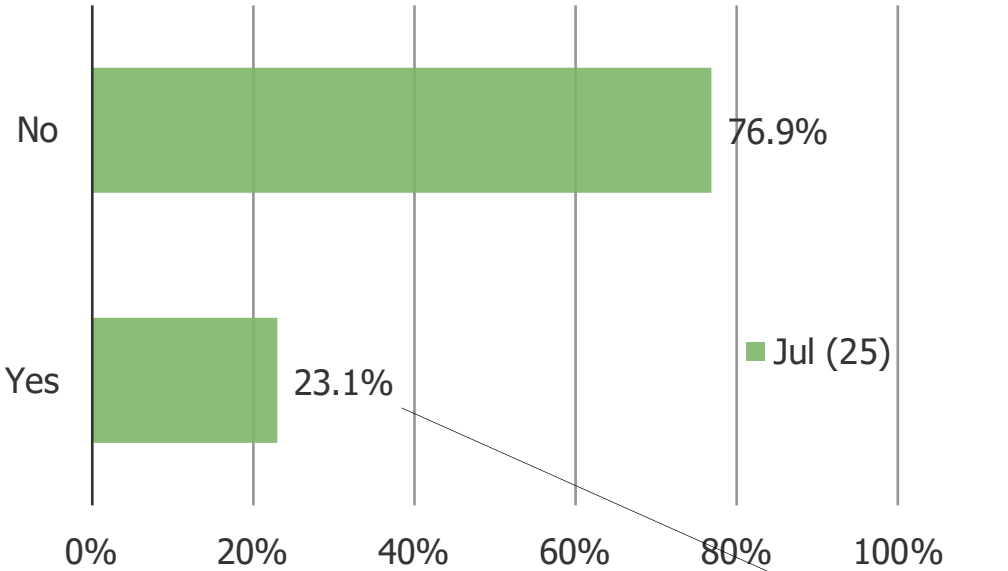
THIS YEAR, AMAZON EXTENDED PRIME DAY PROMOTIONS OVER FOUR DAYS INSTEAD OF TWO. HOW HAS THAT IMPACTED YOUR SHOPPING BEHAVIOR, IF AT ALL?SELECT ALL THAT APPLY

Posed to all respondents



HAVE YOU NOTICED MORE DISCOUNTS OR PROMOTIONS FROM RETAILERS OTHER THAN AMAZON?

Posed to all respondents

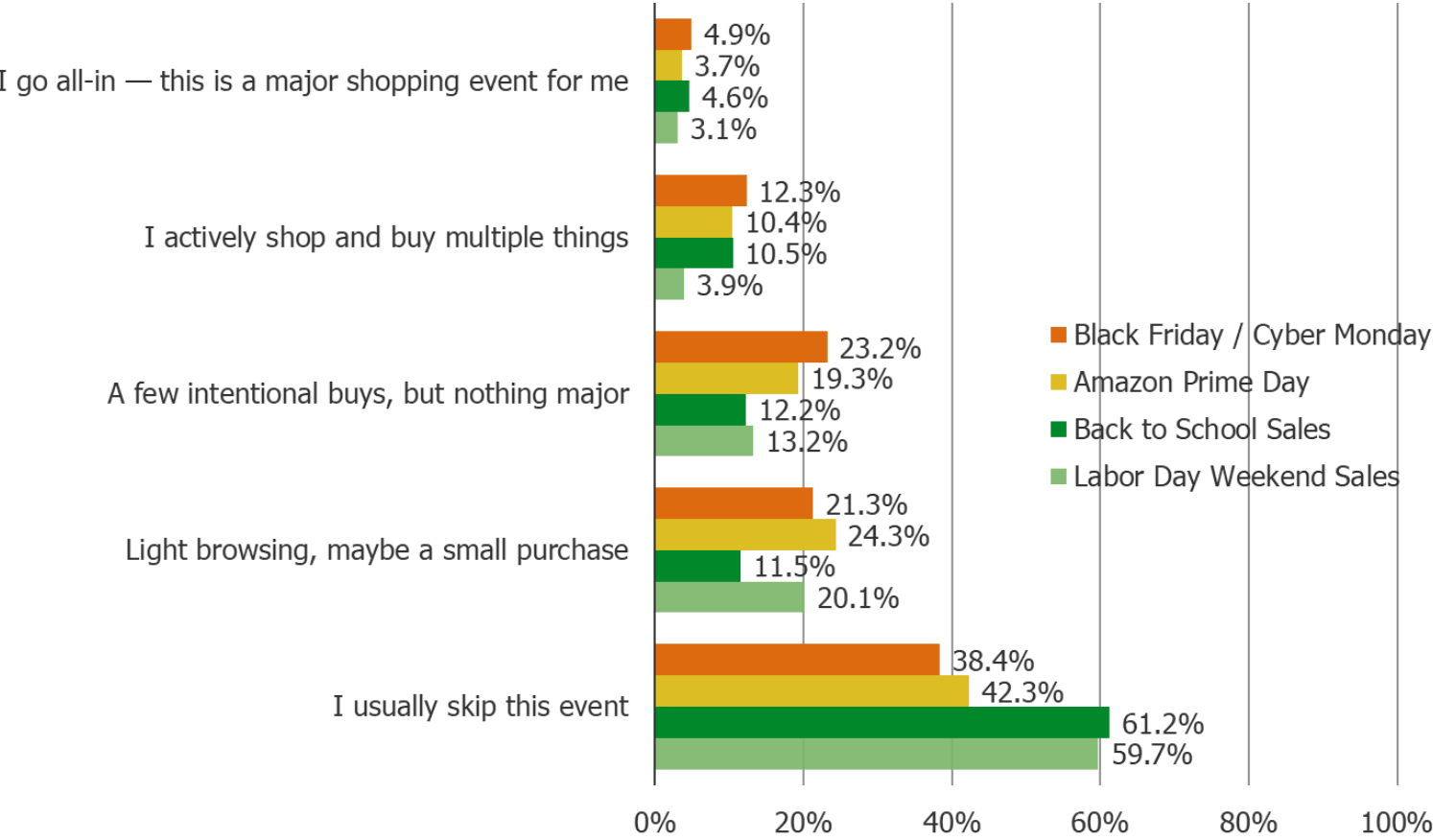


Walmart	11
Target	5
Kohls	2
Lowes	2
Best Buy	2
Macys	1
Ulta	1
Sephora	1
CVS	1
Whole Foods	1
Kroger's	1
Home Goods	1
Shein	1
Ulla Popken	1
Bealls Florida	1
Costco	1
Nike	1
Apple	1



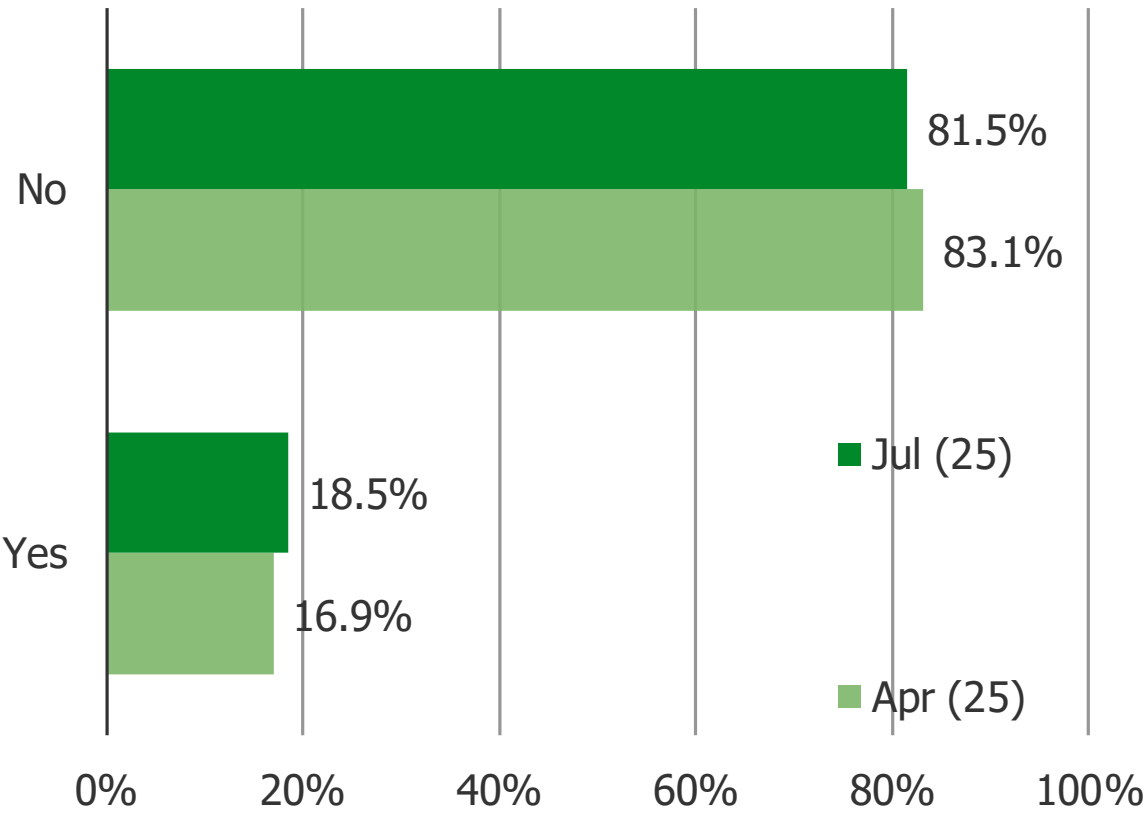
HOW MUCH DO YOU TYPICALLY SPEND DURING EACH OF THESE EVENTS?

Posed to all respondents



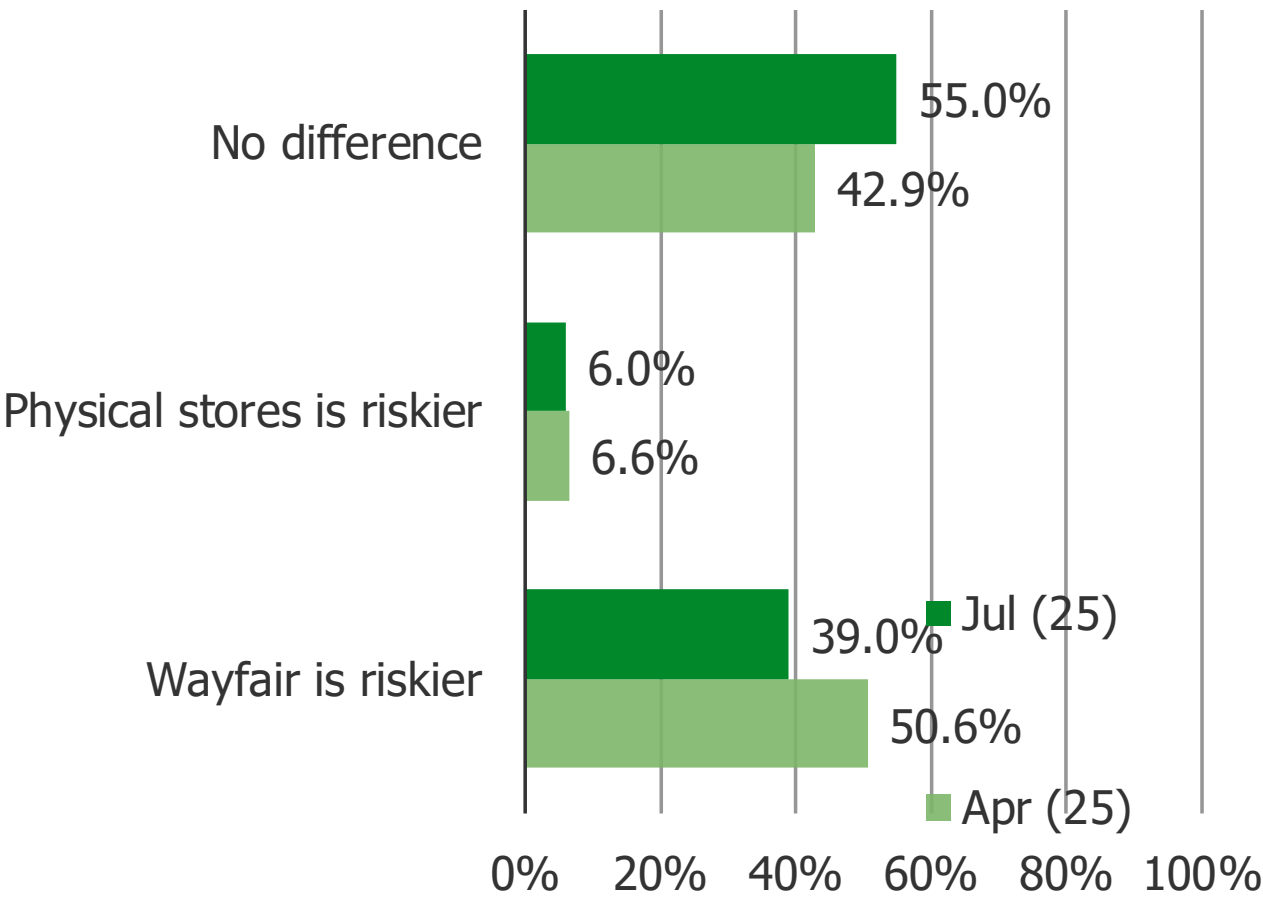
HAVE YOU BROWSED WAYFAIR OR CONSIDERED BUYING FURNITURE FROM WAYFAIR IN THE PAST YEAR OR SO?

Posed to all respondents.



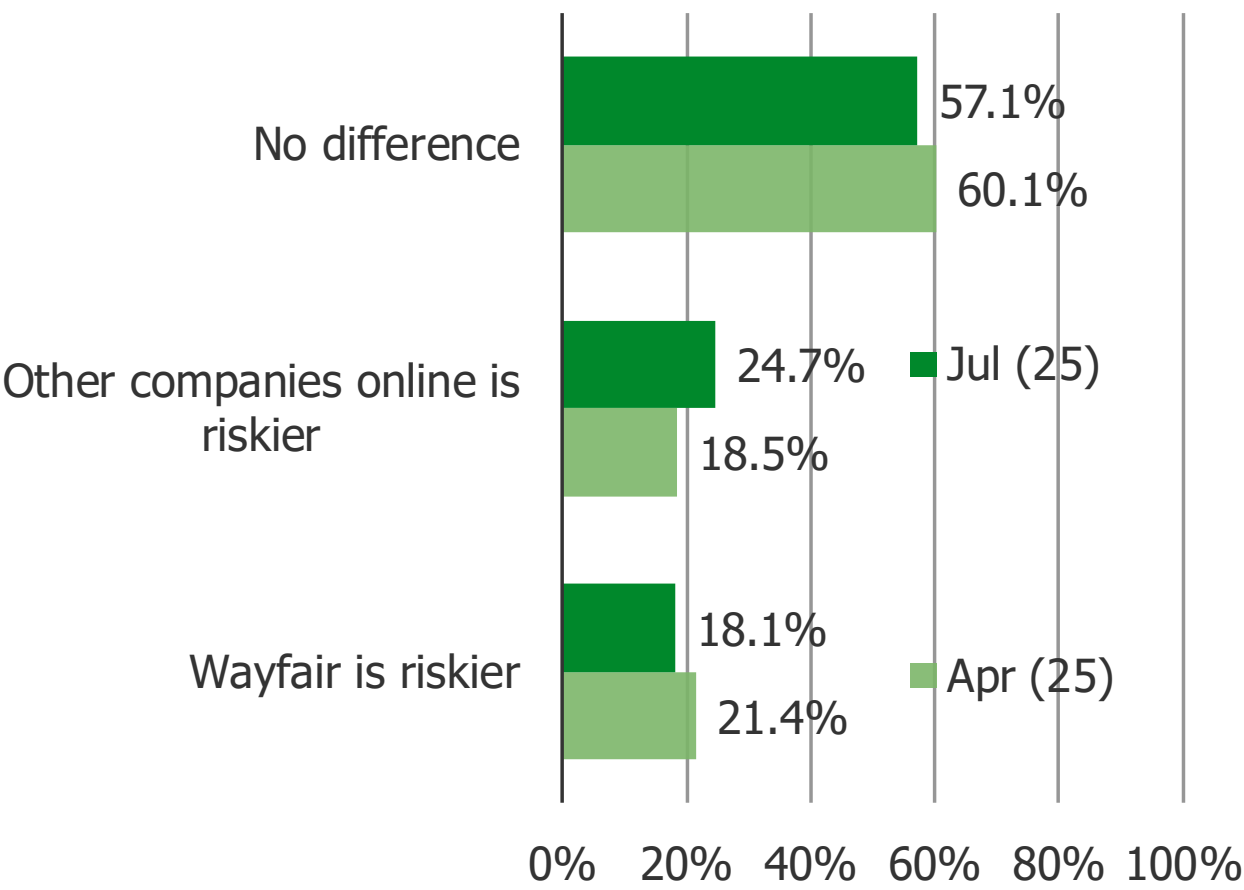
COMPARED TO BUYING FURNITURE IN PHYSICAL STORES, HOW RISKY DO YOU THINK IT IS TO BUY FROM WAYFAIR?(BY “RISKY,” WE MEAN THE CHANCE THAT YOU WON’T BE SATISFIED WITH THE PRODUCT — WHETHER DUE TO QUALITY, APPEARANCE, COMFORT, OR THE ABILITY TO RETURN OR EXCHANGE IT.)

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



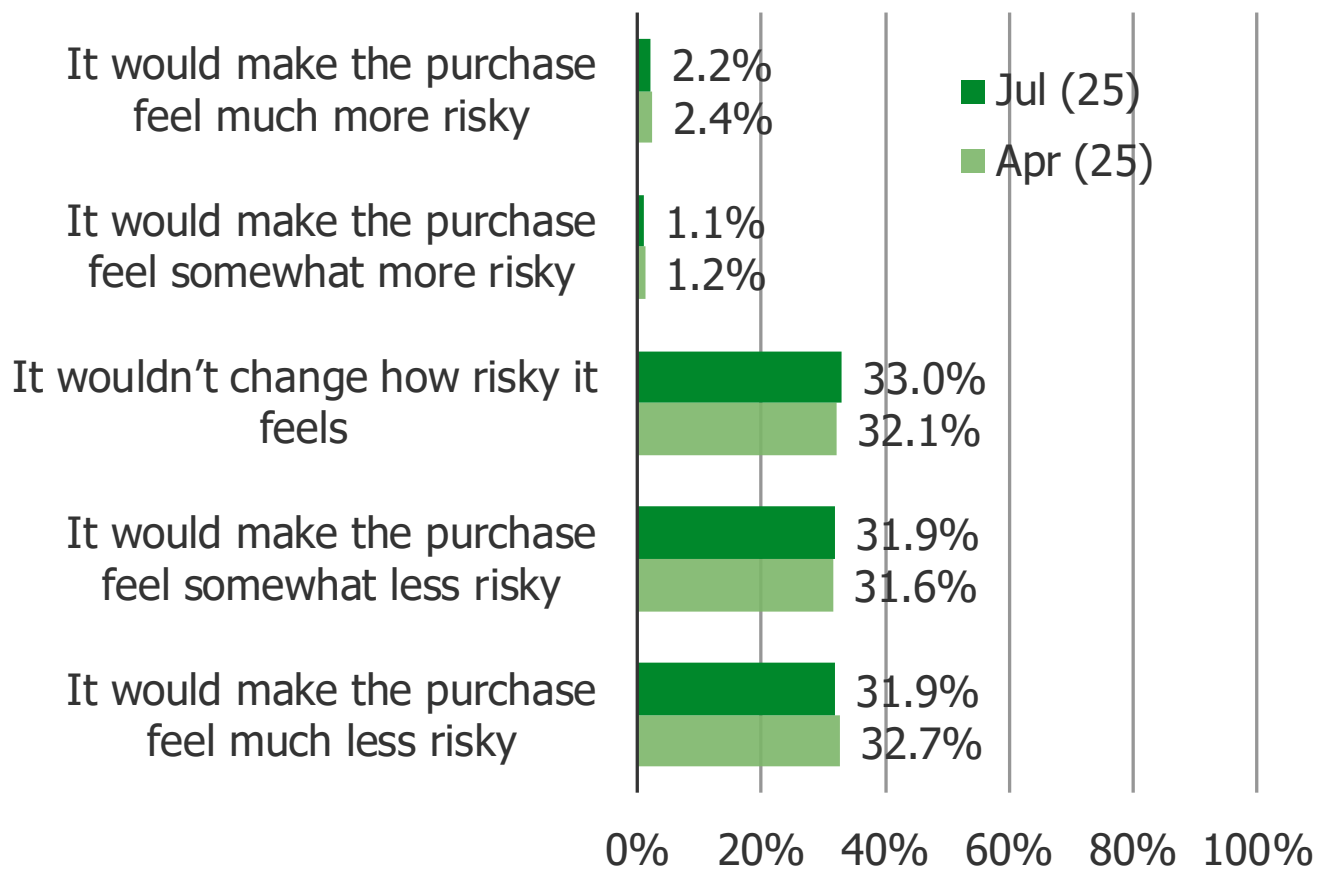
COMPARED TO BUYING FURNITURE FROM OTHER COMPANIES ONLINE, HOW RISKY DO YOU THINK IT IS TO BUY FROM WAYFAIR?(BY “RISKY,” WE MEAN THE CHANCE THAT YOU WON’T BE SATISFIED WITH THE PRODUCT — WHETHER DUE TO QUALITY, APPEARANCE, COMFORT, OR THE ABILITY TO RETURN OR EXCHANGE IT.)

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



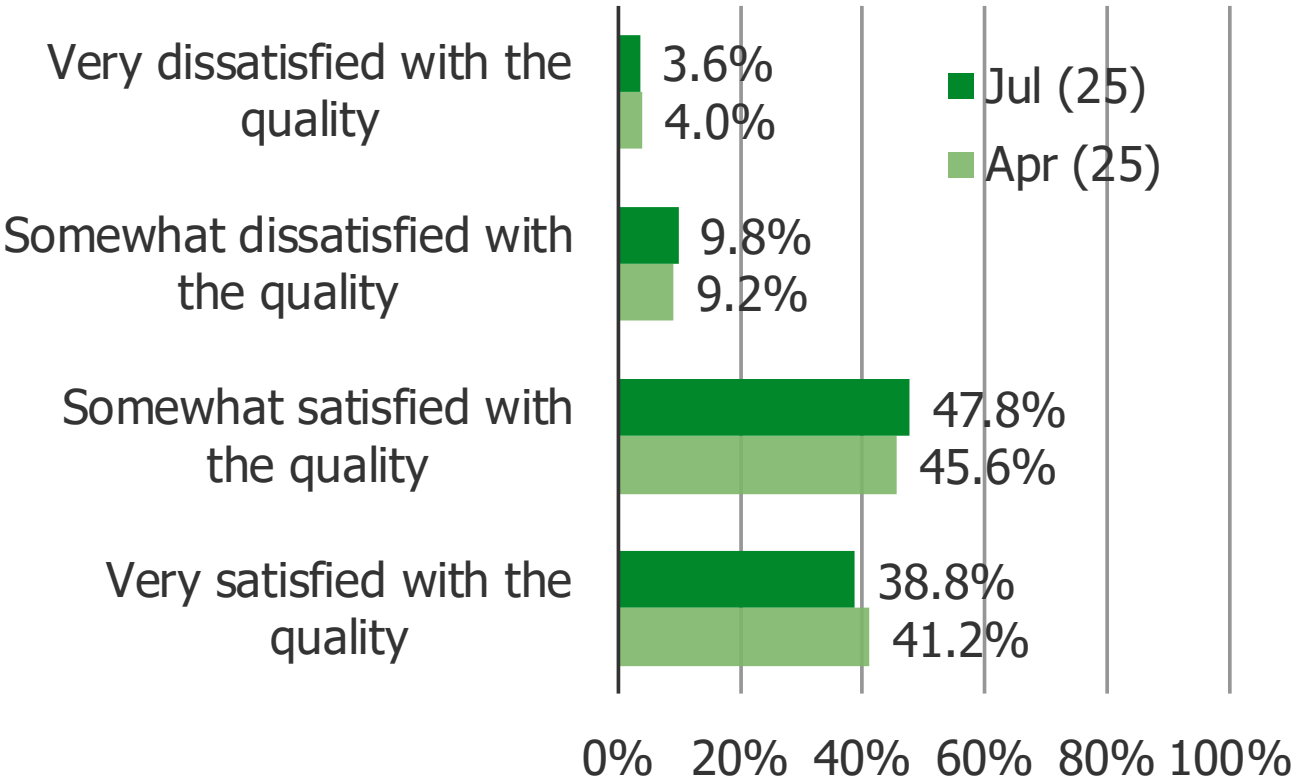
IF WAYFAIR ADDED A “VERIFIED BY WAYFAIR” STAMP TO CERTAIN FURNITURE ITEMS — INDICATING THAT THEIR TEAM HAS PERSONALLY TESTED THE PRODUCT FOR QUALITY, EASE OF ASSEMBLY, VALUE, AND OVERALL SATISFACTION — HOW WOULD THAT AFFECT HOW RISKY YOU THINK IT IS TO BUY THOSE PRODUCTS?

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



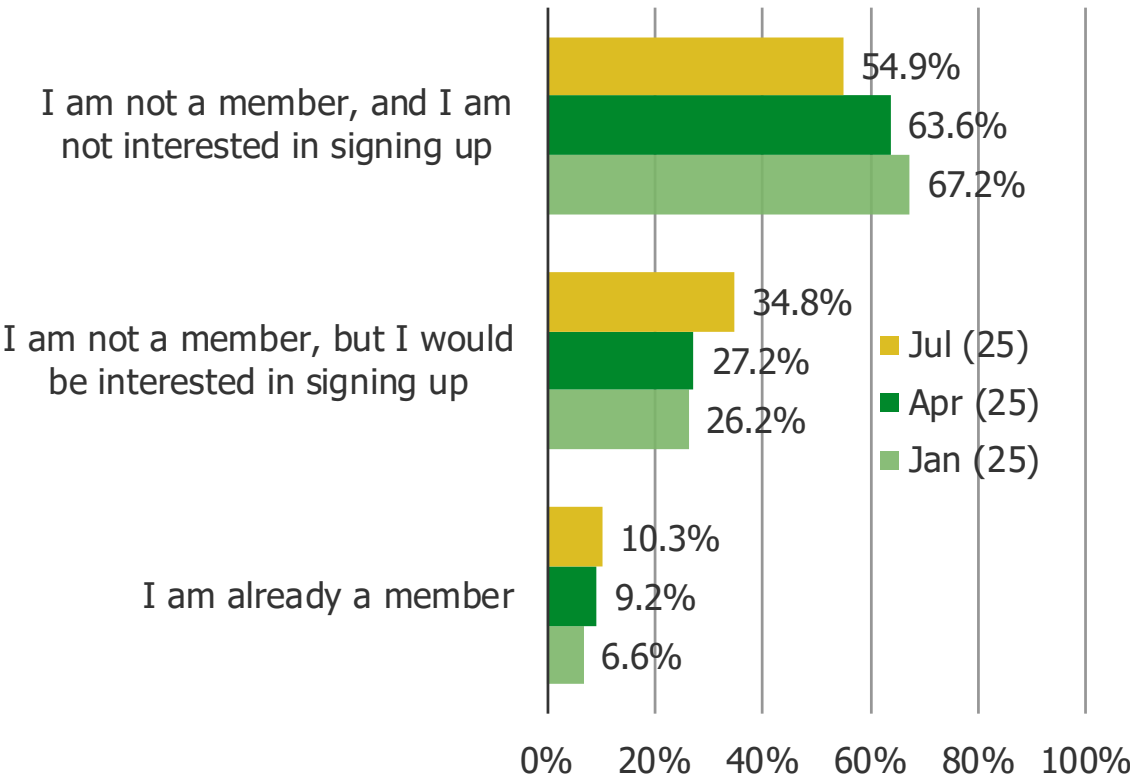
THINKING ABOUT THE FURNITURE YOU HAVE GOTTEN FROM WAYFAIR, HOW WAS THE QUALITY?

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.

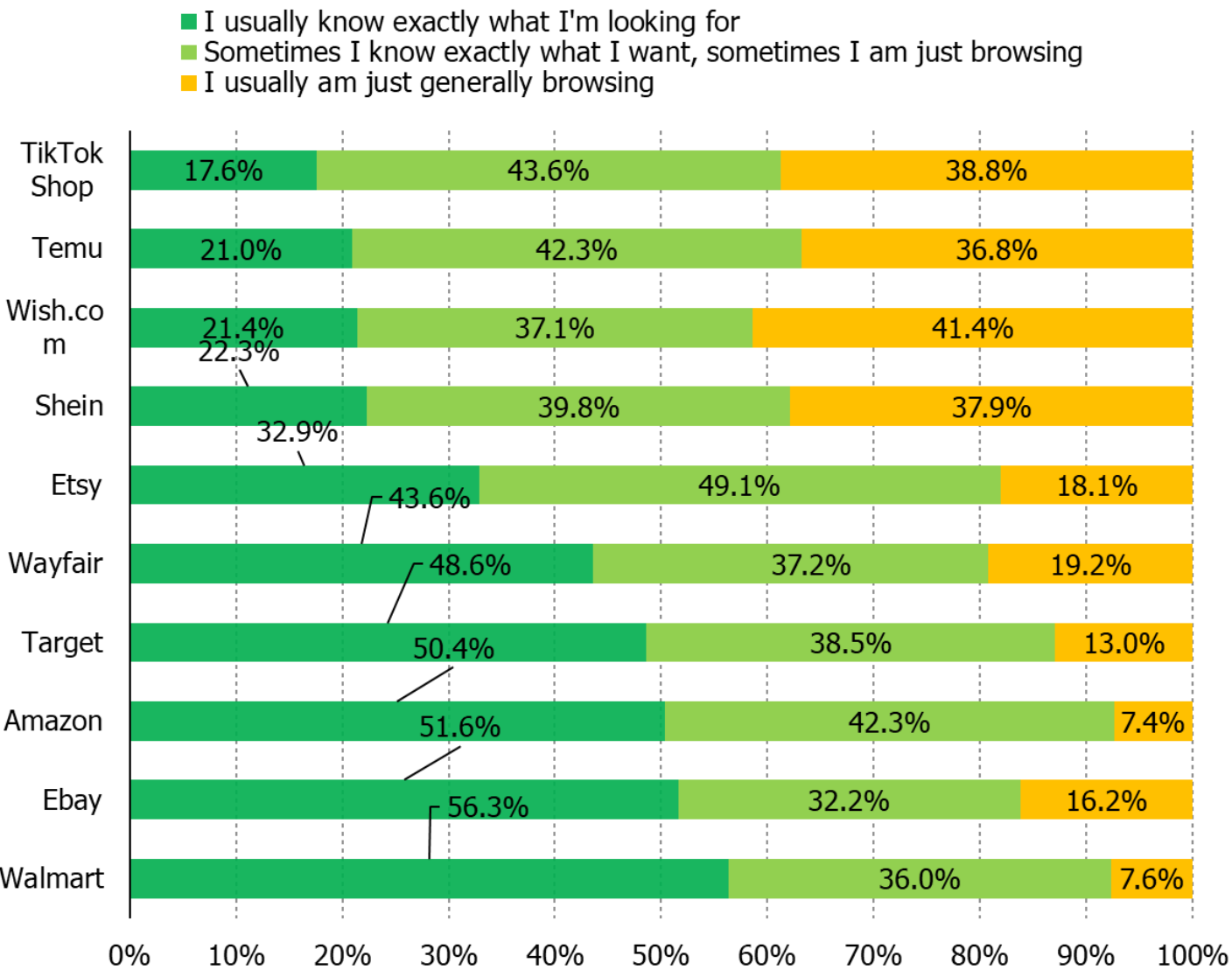
Posed to all Wayfair customers.



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.

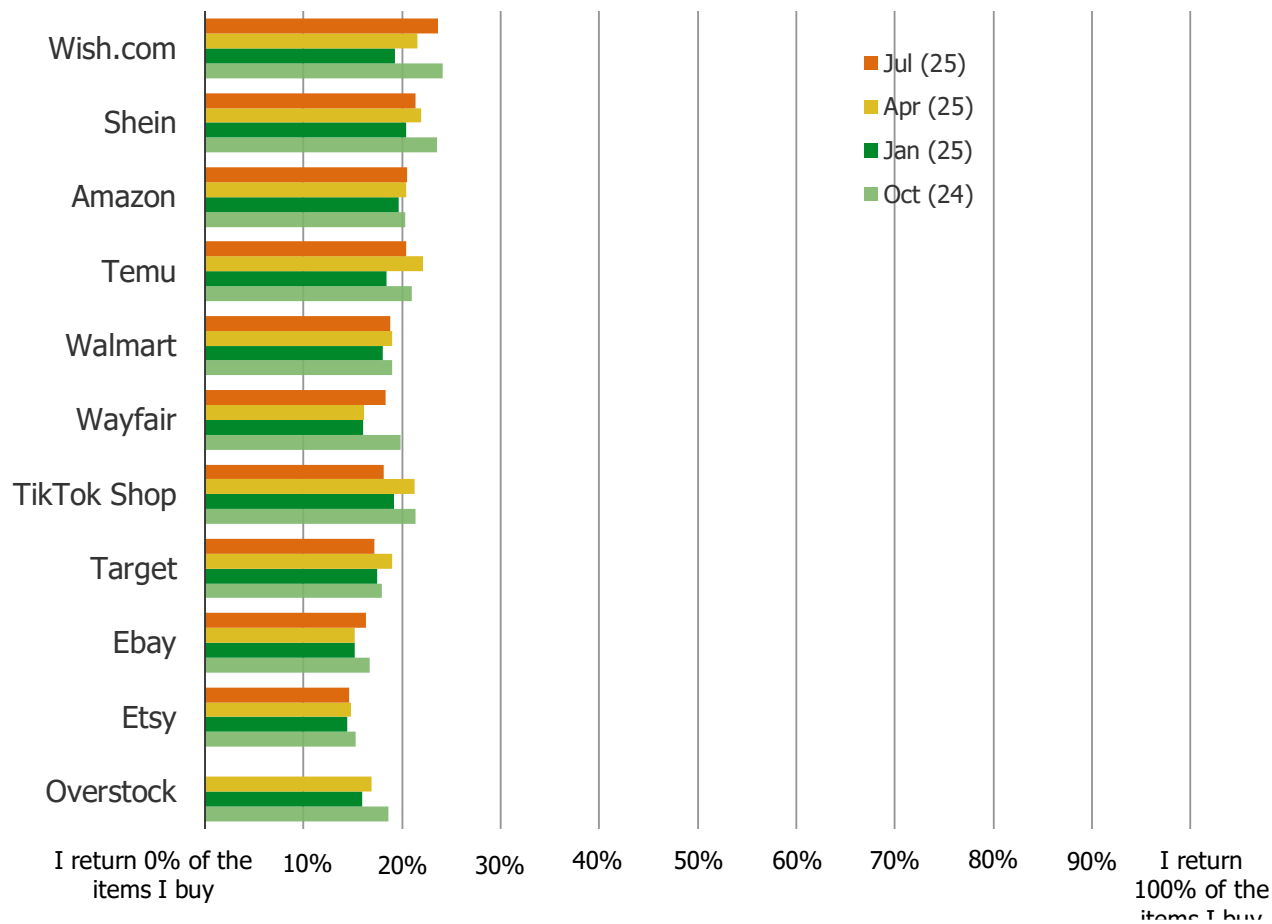
JULY 2025





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

Posed to all respondents who shop the below.

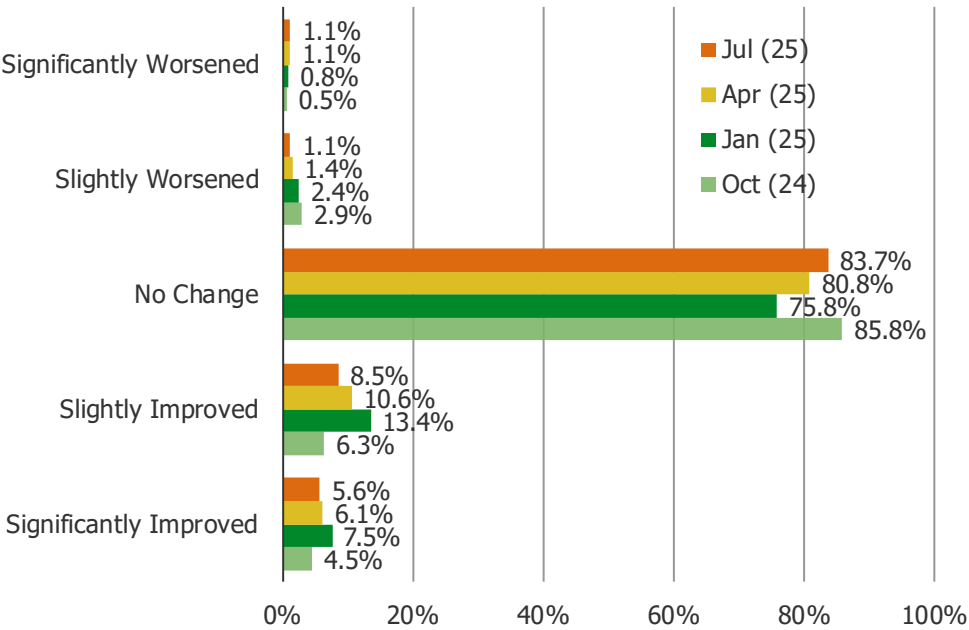


Weighted average above, full breakdown of responses below (Jul 25 Data)...

Return X% of Items I Buy	0%	10.0%	20.0%	30.0%	40.0%	50.0%	60.0%	70.0%	80.0%	90.0%	100.0%	N=
Etsy	80.9%	11.2%	2.2%	2.2%	0.0%	1.8%	0.4%	0.4%	0.0%	0.7%	0.4%	277
Ebay	71.5%	20.2%	1.3%	1.1%	1.1%	1.9%	1.1%	0.5%	0.0%	0.5%	0.8%	376
Target	64.7%	23.8%	4.3%	2.1%	1.7%	0.6%	0.4%	0.4%	0.6%	0.8%	0.8%	533
TikTok Shop	70.9%	15.8%	3.0%	2.4%	1.2%	2.4%	0.6%	1.2%	0.0%	1.8%	0.6%	165
Wayfair	65.4%	19.2%	5.8%	1.9%	1.9%	1.9%	1.3%	1.3%	0.0%	0.6%	0.6%	156
Walmart	55.8%	29.1%	6.6%	2.7%	1.8%	1.0%	0.6%	0.6%	0.7%	0.8%	0.6%	733
Temu	63.2%	15.4%	4.7%	7.1%	1.2%	3.6%	1.6%	2.0%	0.0%	0.4%	0.8%	253
Amazon	43.7%	38.6%	6.9%	3.5%	2.1%	2.4%	0.5%	0.8%	0.7%	0.4%	0.5%	852
Shein	63.1%	12.1%	7.3%	3.9%	3.9%	6.3%	0.0%	1.0%	1.0%	0.5%	1.0%	206
Wish.com	62.9%	15.7%	1.4%	4.3%	4.3%	1.4%	0.0%	2.9%	4.3%	2.9%	0.0%	70

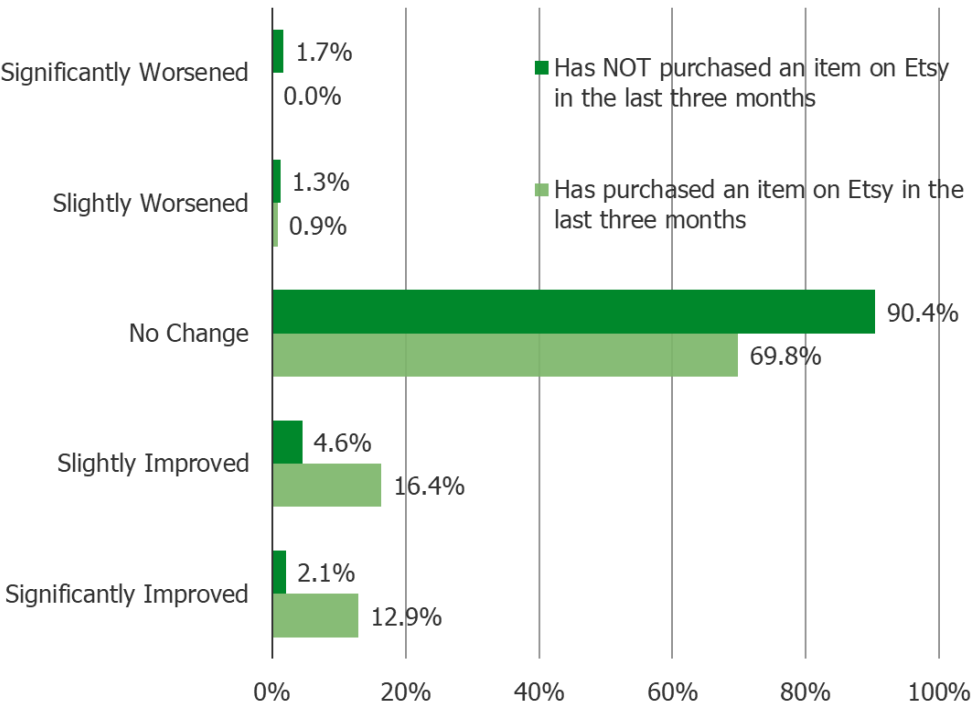
HAVE YOU NOTICED ANY CHANGES RECENTLY TO THE EXPERIENCE OF SEARCHING FOR ITEMS ON THE ETSY SITE OR APP?

Posed to all respondents who ever use or visit Etsy.



JULY 2025

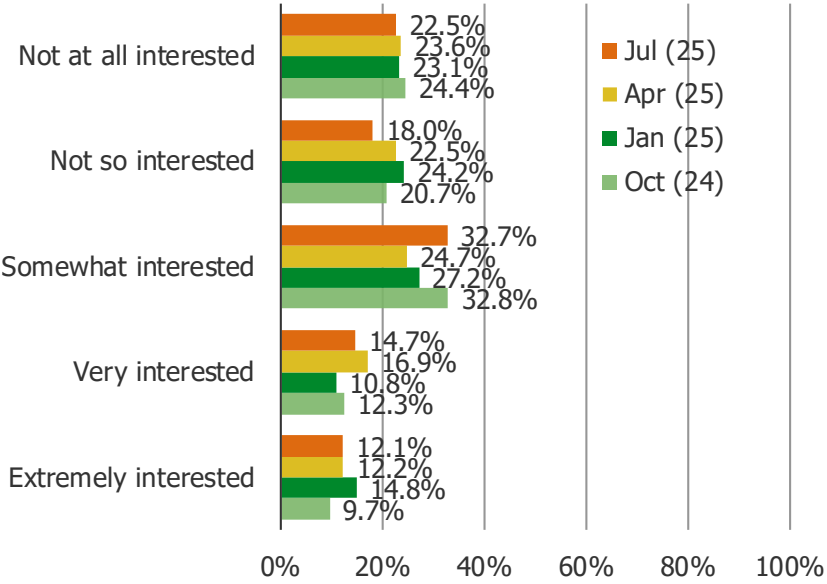
Cross-tabbing the above by if they have shopped Etsy in the past three months or not...



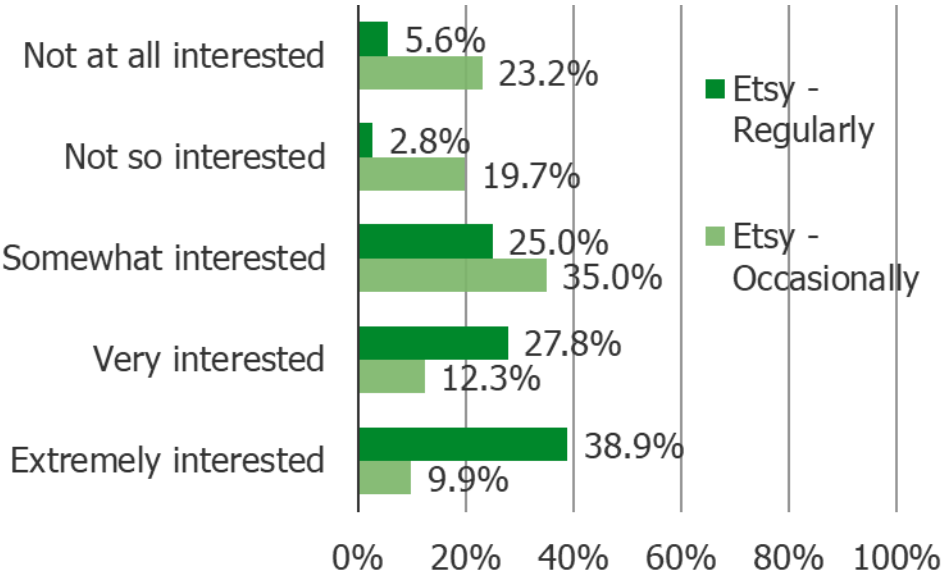
HOW MUCH INTEREST WOULD YOU HAVE IN JOINING AN ETSY INSIDER MEMBERSHIP PROGRAM?

- 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.

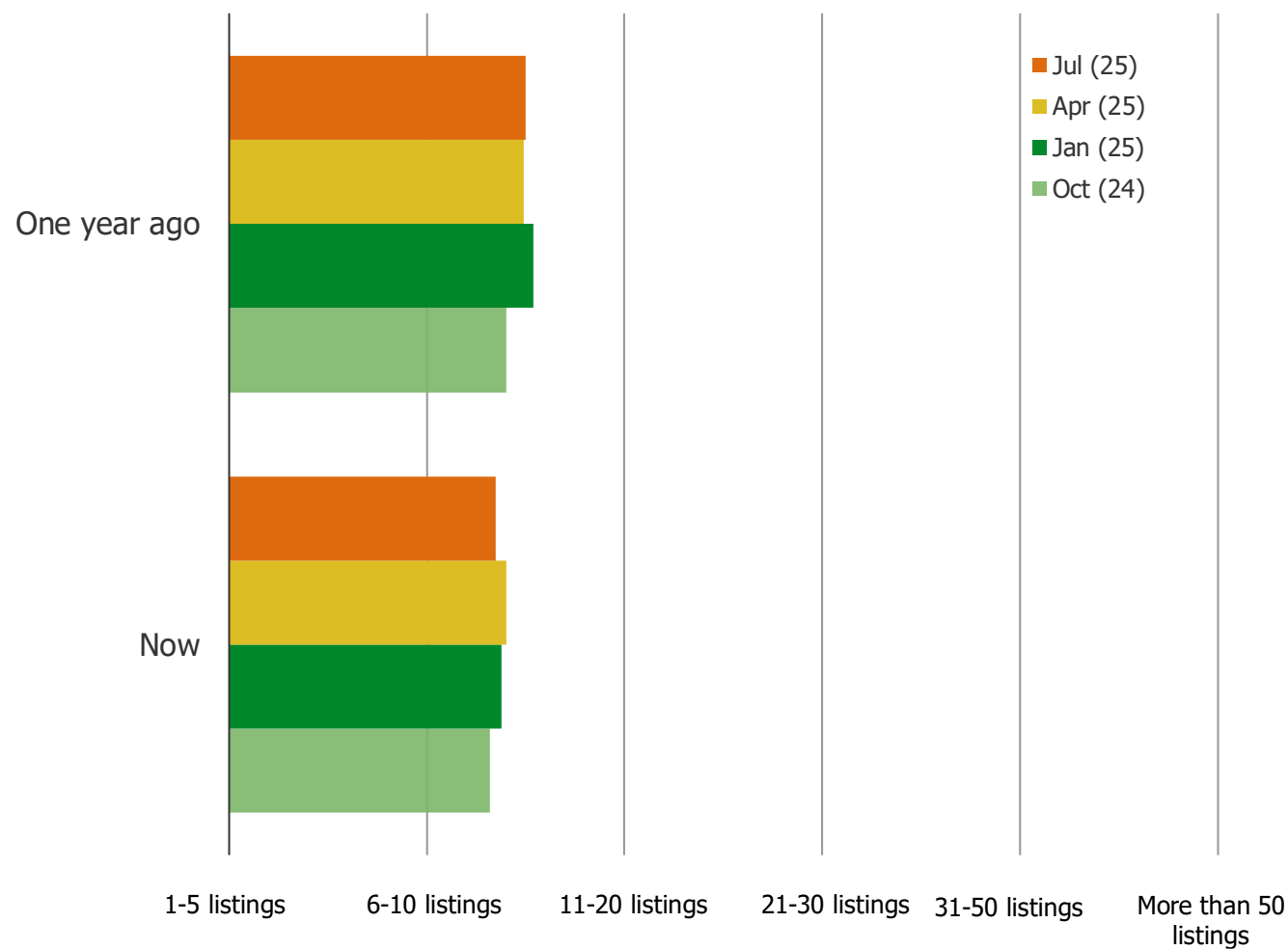


JULY 2025 - Cross tabbing the data above...



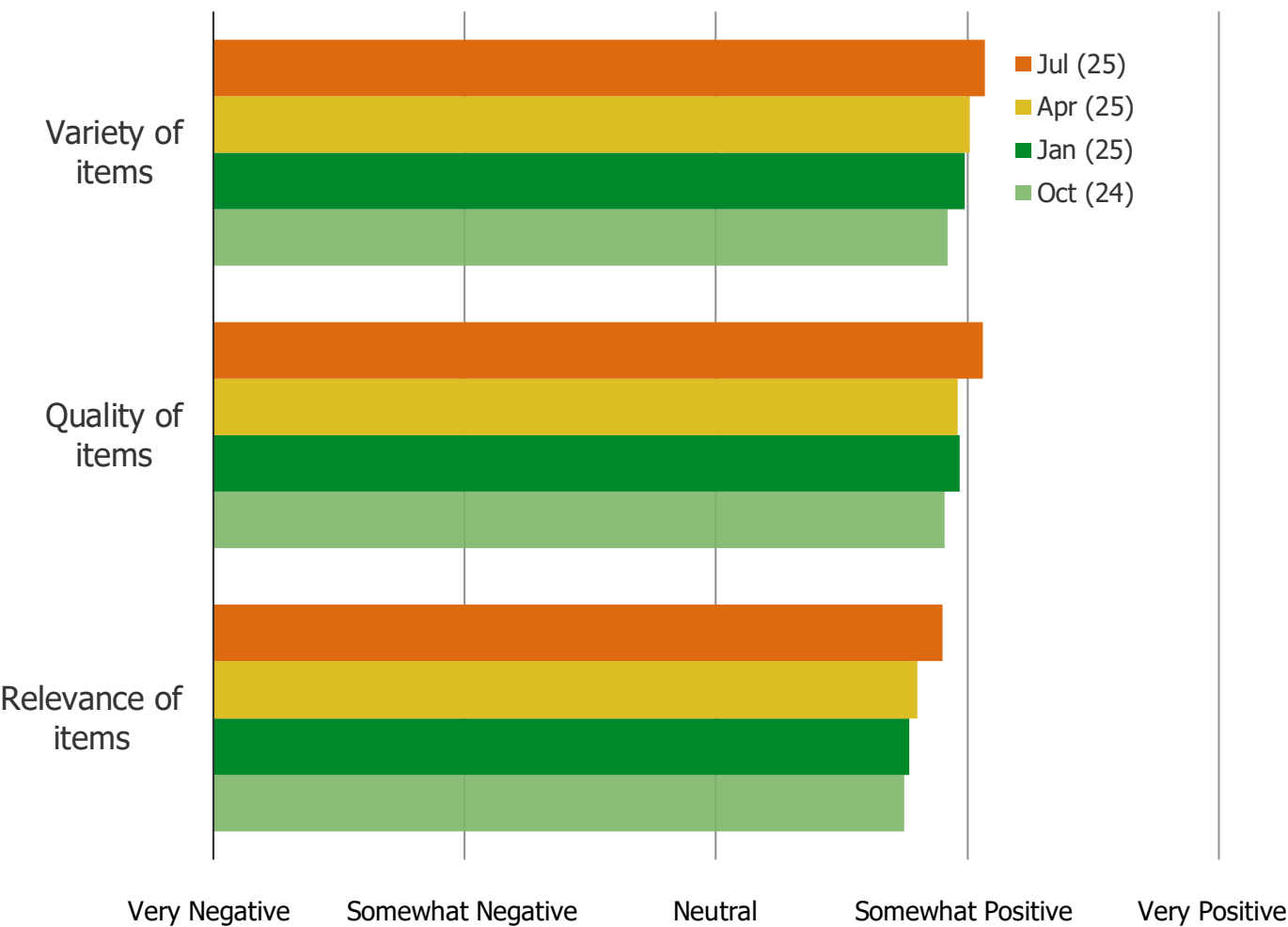
HOW MANY LISTINGS WOULD YOU ESTIMATE YOU NEED TO LOOK THROUGH WHEN YOU SEARCH FOR ITEMS ON ETSY BEFORE YOU FIND WHAT YOU WERE LOOKING FOR?

Posed to all respondents who ever use or visit Etsy.



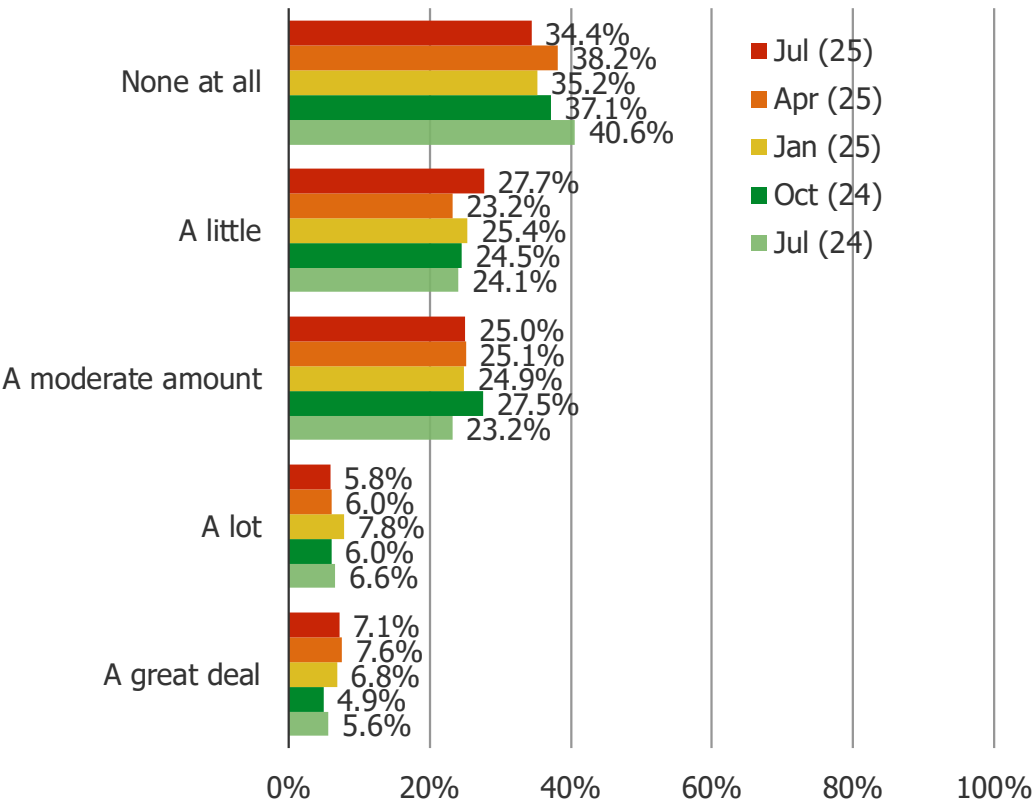
WHAT IS YOUR OPINION OF THE FOLLOWING WHEN SEARCHING FOR ITEMS ON ETSY?

Posed to all respondents who ever use or visit Etsy.

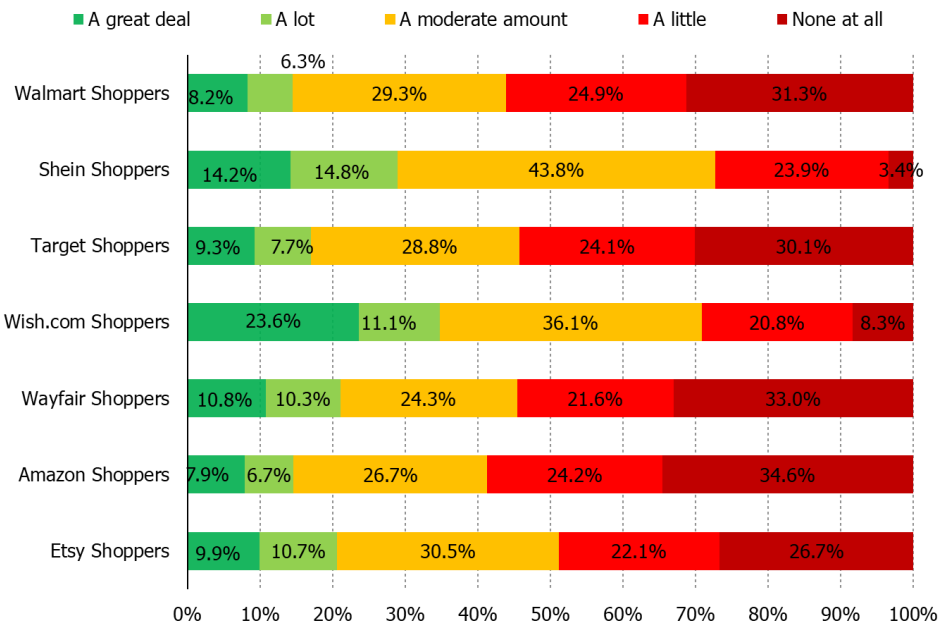


HOW MUCH USE DO YOU HAVE IN GENERAL FOR WEBSITES OR APPS THAT SELL CHEAP GOODS AND SHIP FROM WAREHOUSES IN CHINA DIRECTLY TO YOU IN THE US?

Posed to all respondents

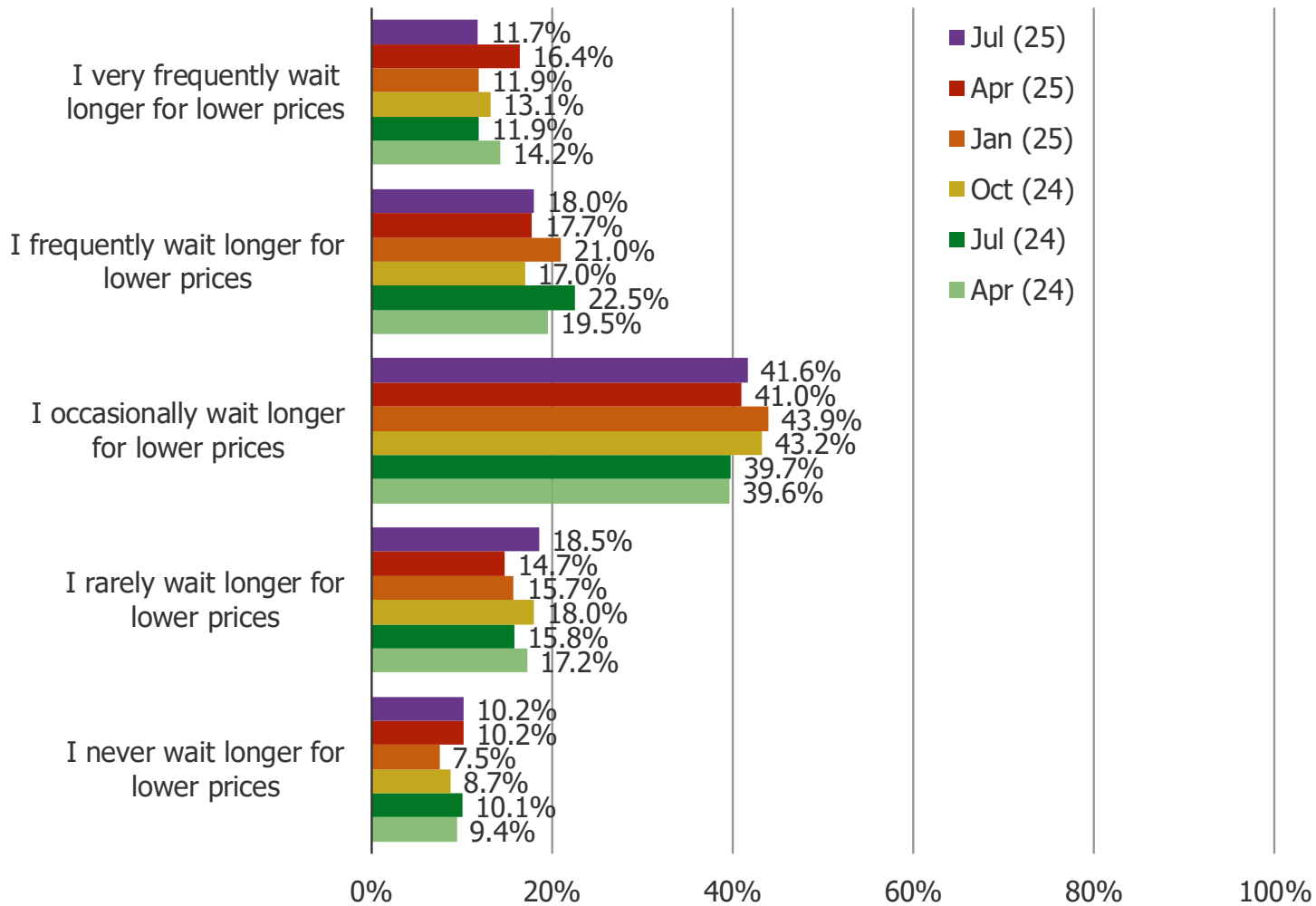


Cross-tabbing the above chart...



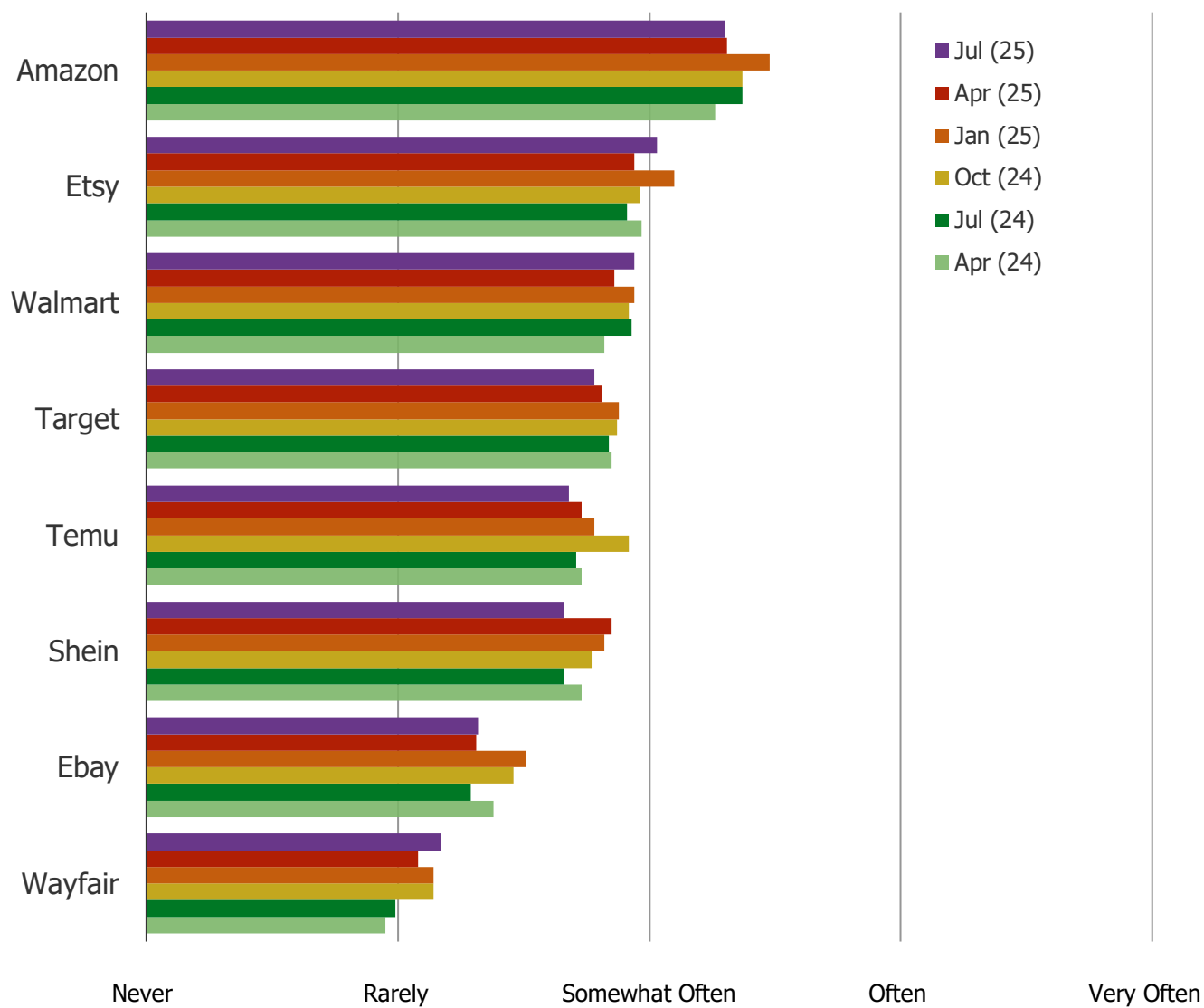
WHEN YOU SHOP ONLINE, HOW DO YOU THINK ABOUT THE TRADEOFF BETWEEN PRICE AND DELIVERY SPEED?

Posed to all respondents.



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

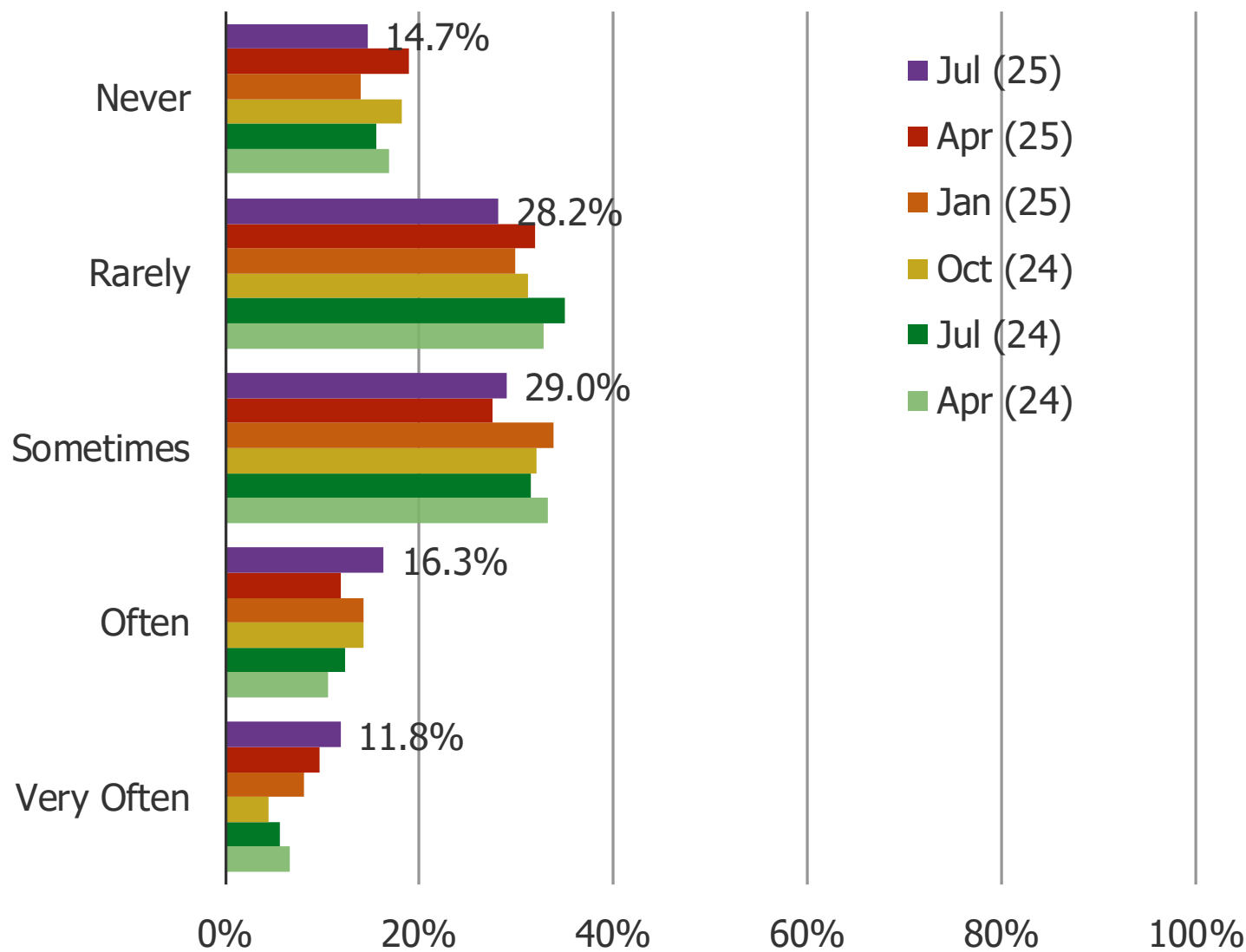
Posed to all respondents who shop the following regularly or occasionally.





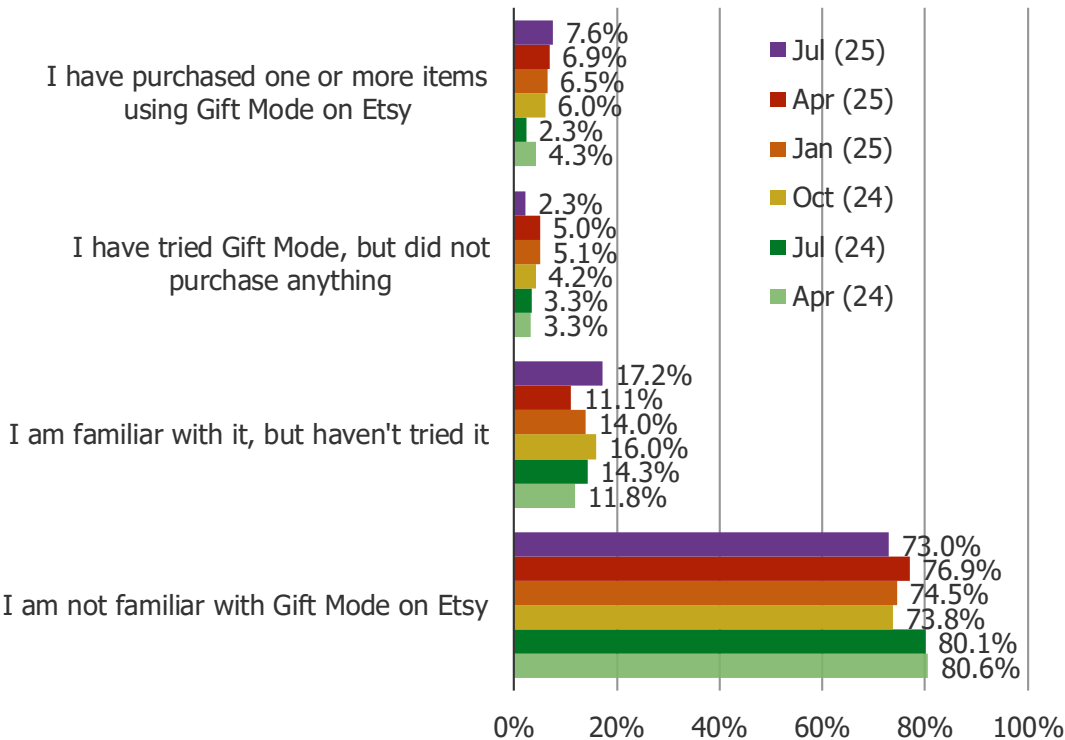
HOW OFTEN DO YOU USE ETSY TO BUY GIFTS FOR OTHERS?

Posed to all respondents who have shopped Etsy.

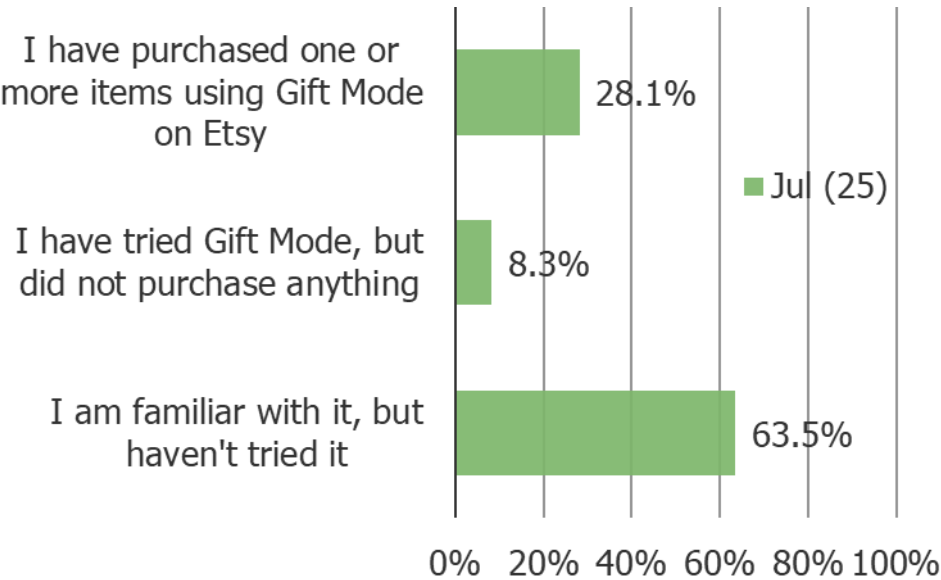


HAVE YOU TRIED GIFT MODE ON ETSY?

Posed to all respondents who have shopped Etsy.

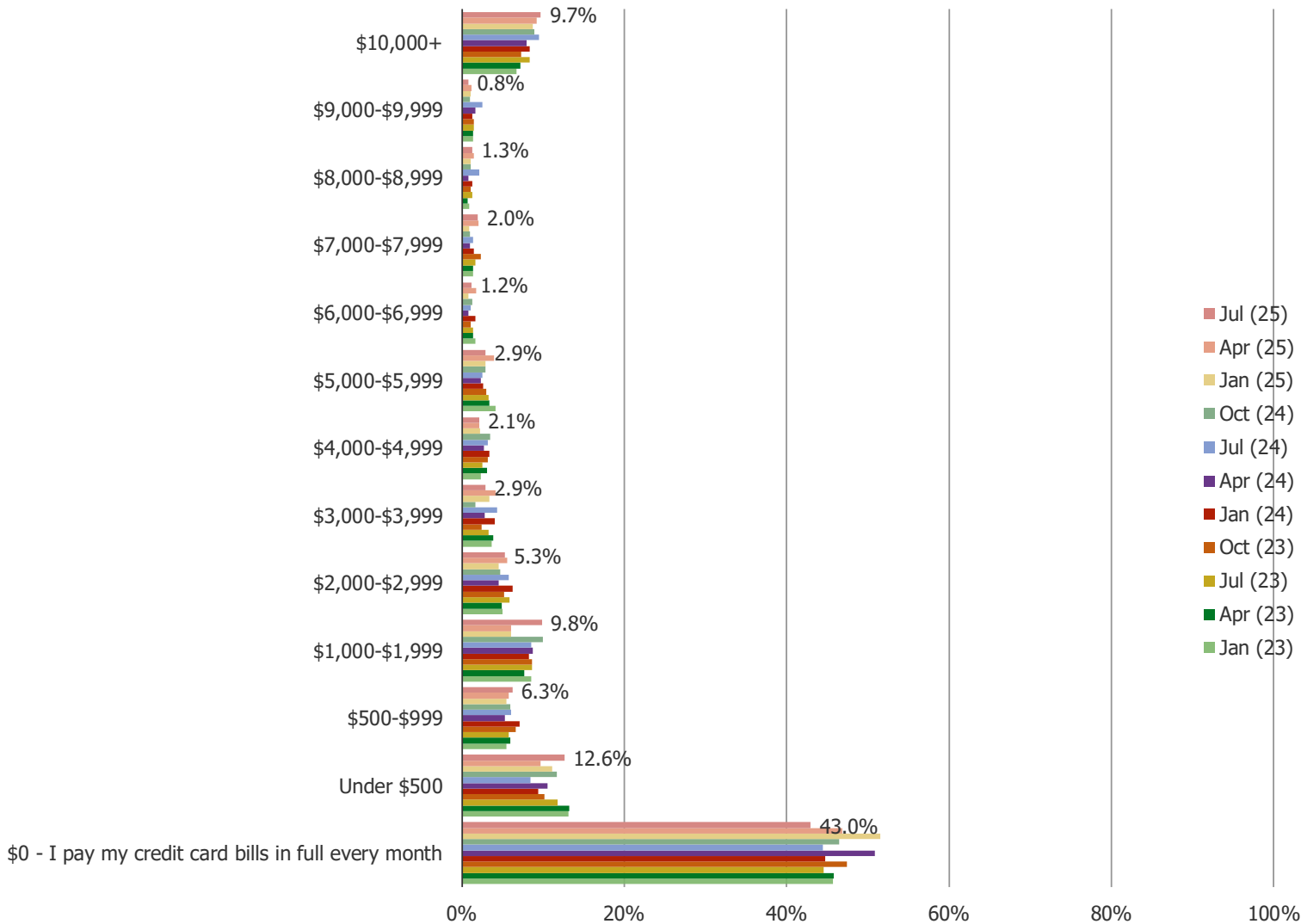


Posed to all respondents who have shopped Etsy (factoring out people who aren't aware of Gift Mode on Etsy).



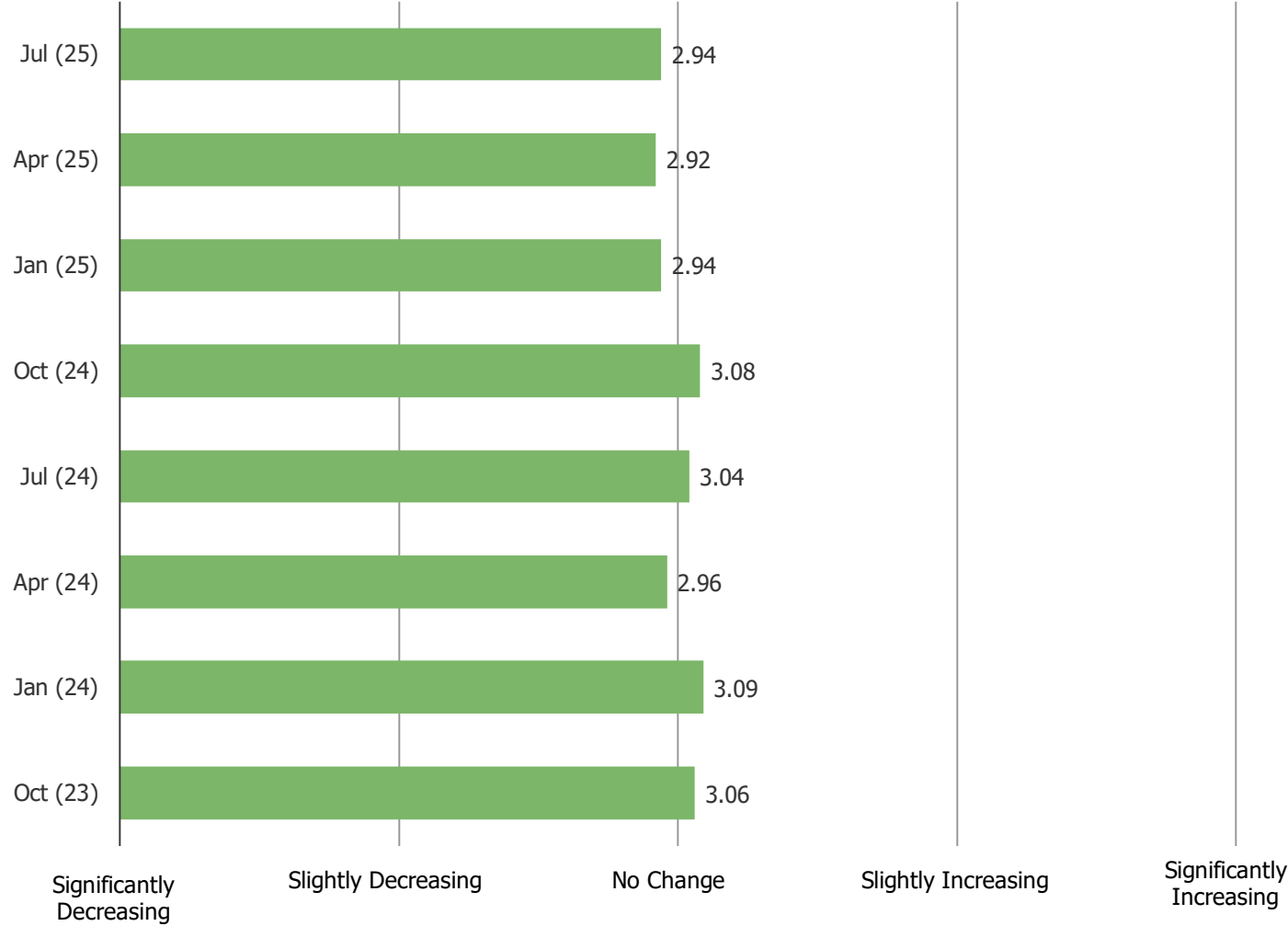
HOW MUCH CREDIT CARD DEBT DO YOU HAVE? IE – HOW MUCH OF AN OUTSTANDING BALANCE DO YOU CARRY OVER FROM MONTH TO MONTH?

Posed to all respondents.



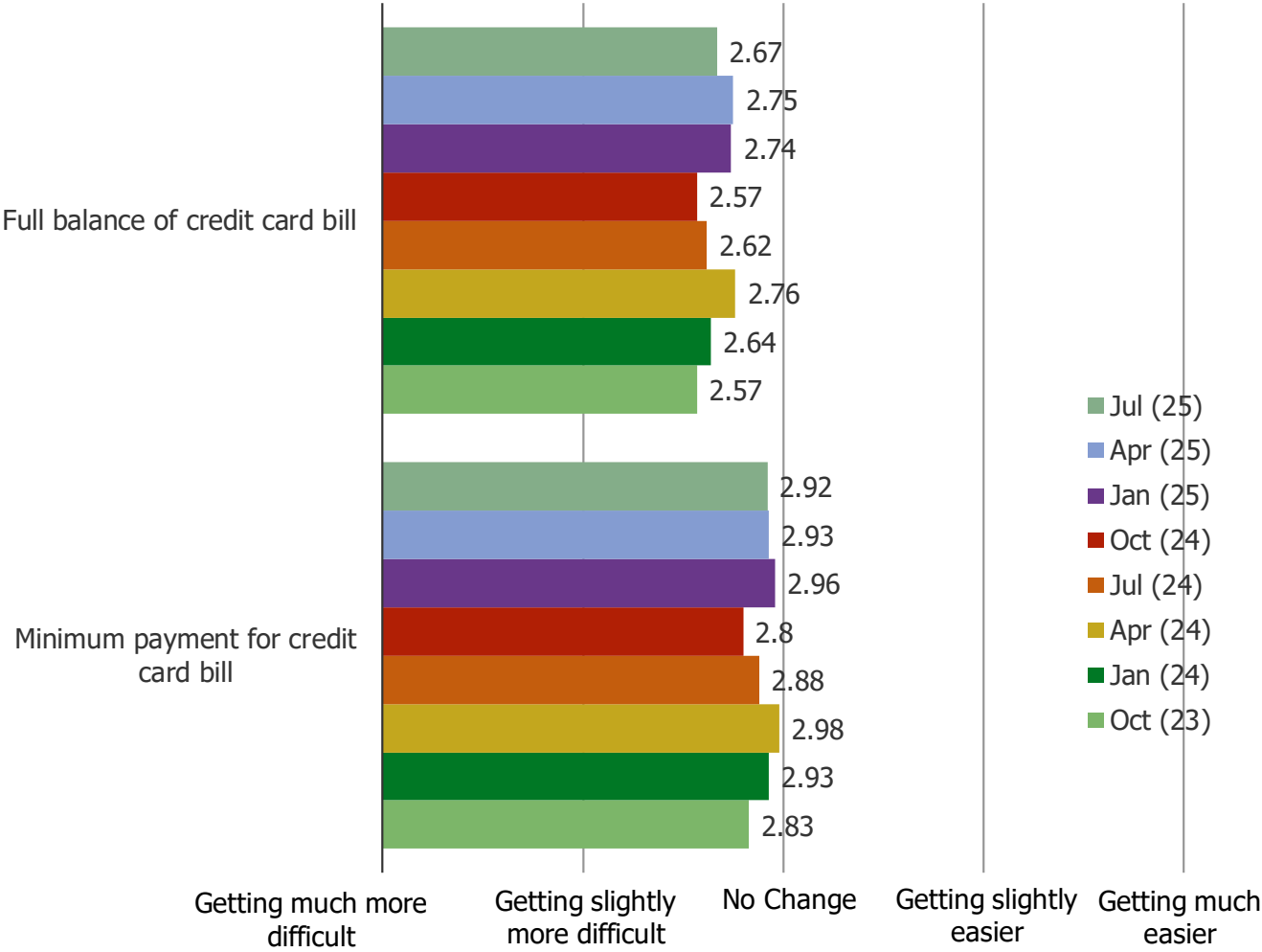
HAS THE AMOUNT OF CREDIT CARD DEBT THAT YOU HAVE BEEN INCREASING OR DECREASING OVER THE PAST 12 MONTHS?

Posed to all respondents.



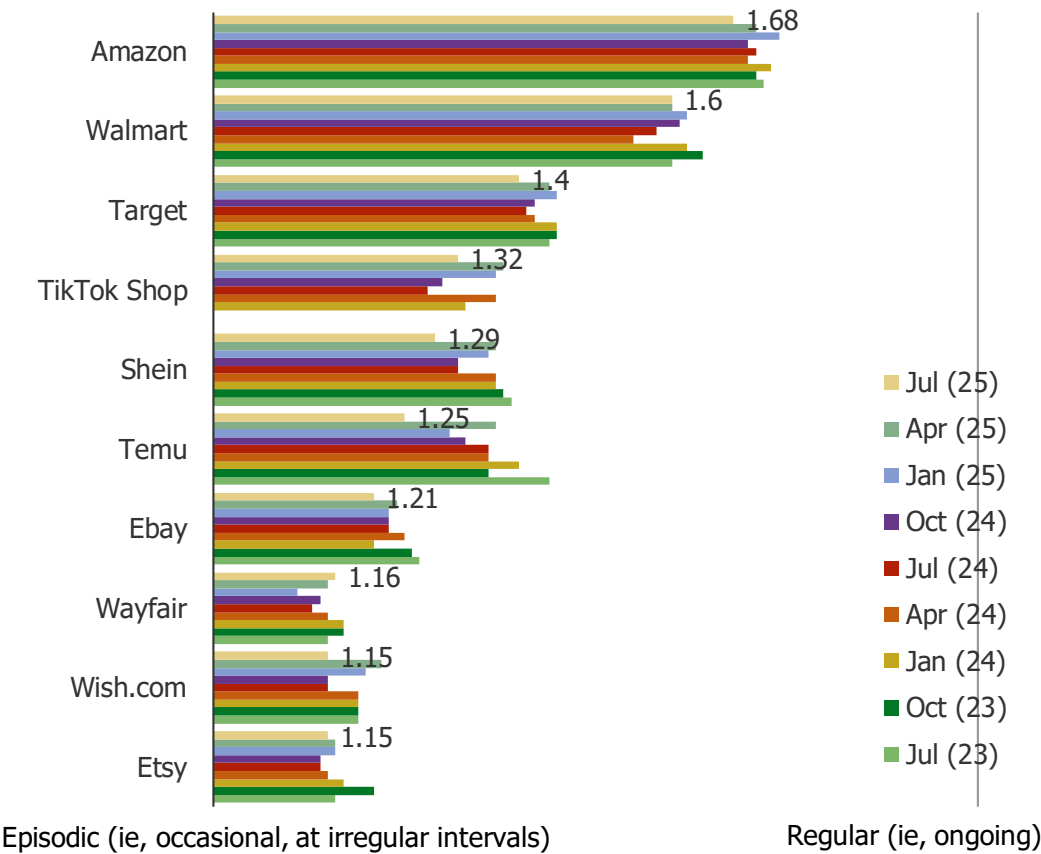
IS IT GETTING EASIER OR MORE DIFFICULT TO PAY THE FOLLOWING EACH MONTH...

Posed to all respondents.

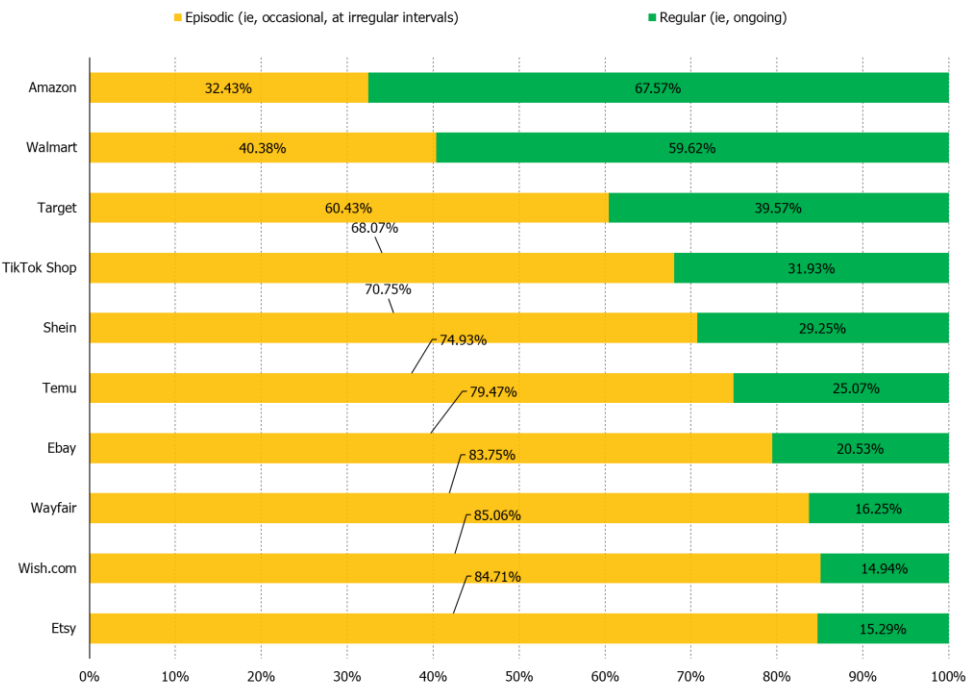


WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.



July 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.

eBay





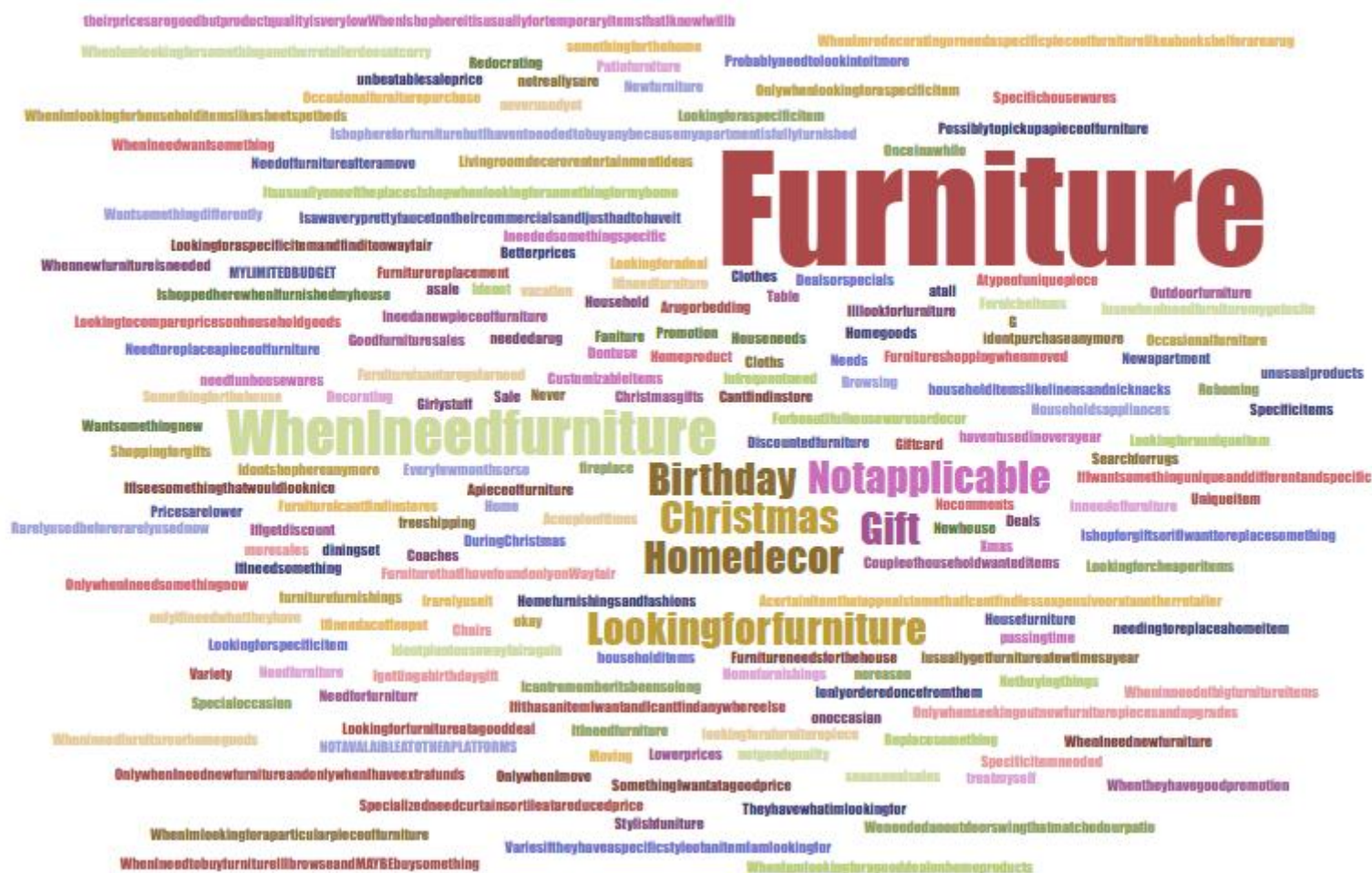
Posed to all respondents who shop the below and their use is more episodic than regular.

## Etsy



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

## Wayfair





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.

## 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



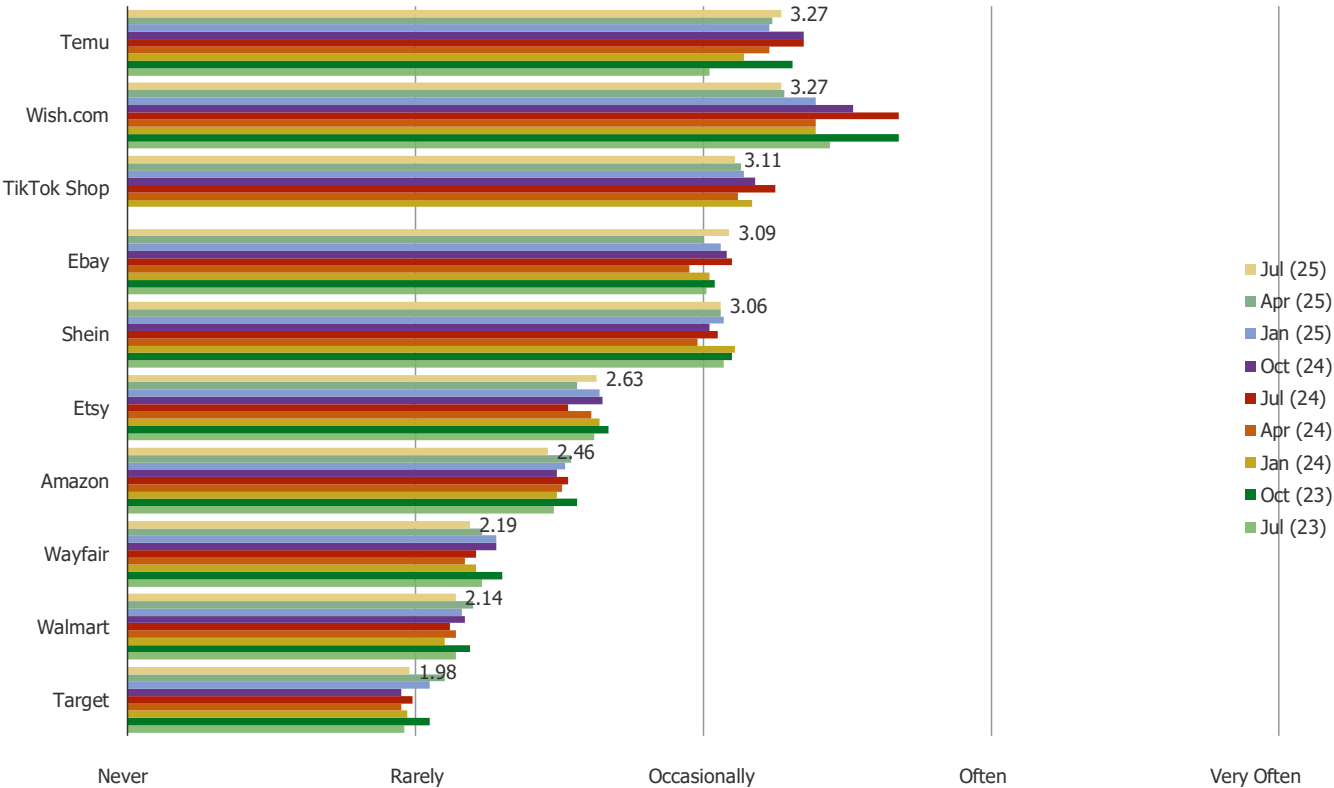


Posed to all respondents who shop the below and their use is more episodic than regular.

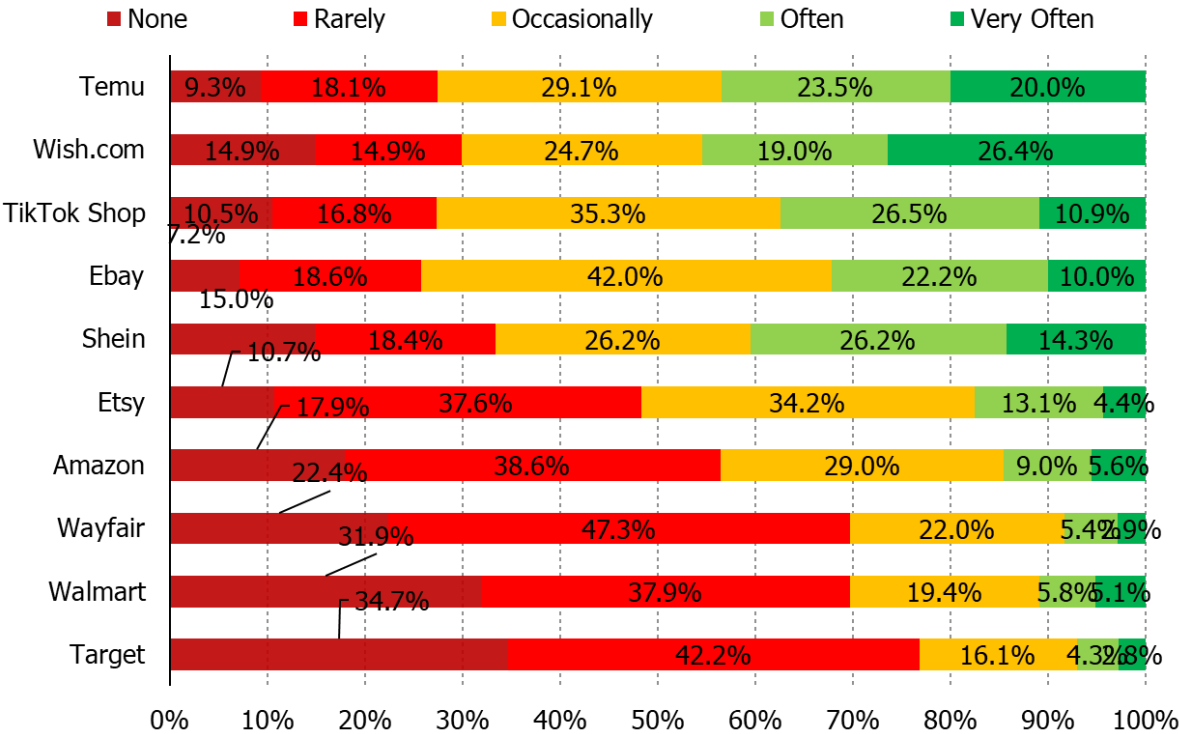
[illegible]

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

Posed to all respondents who shop the below.



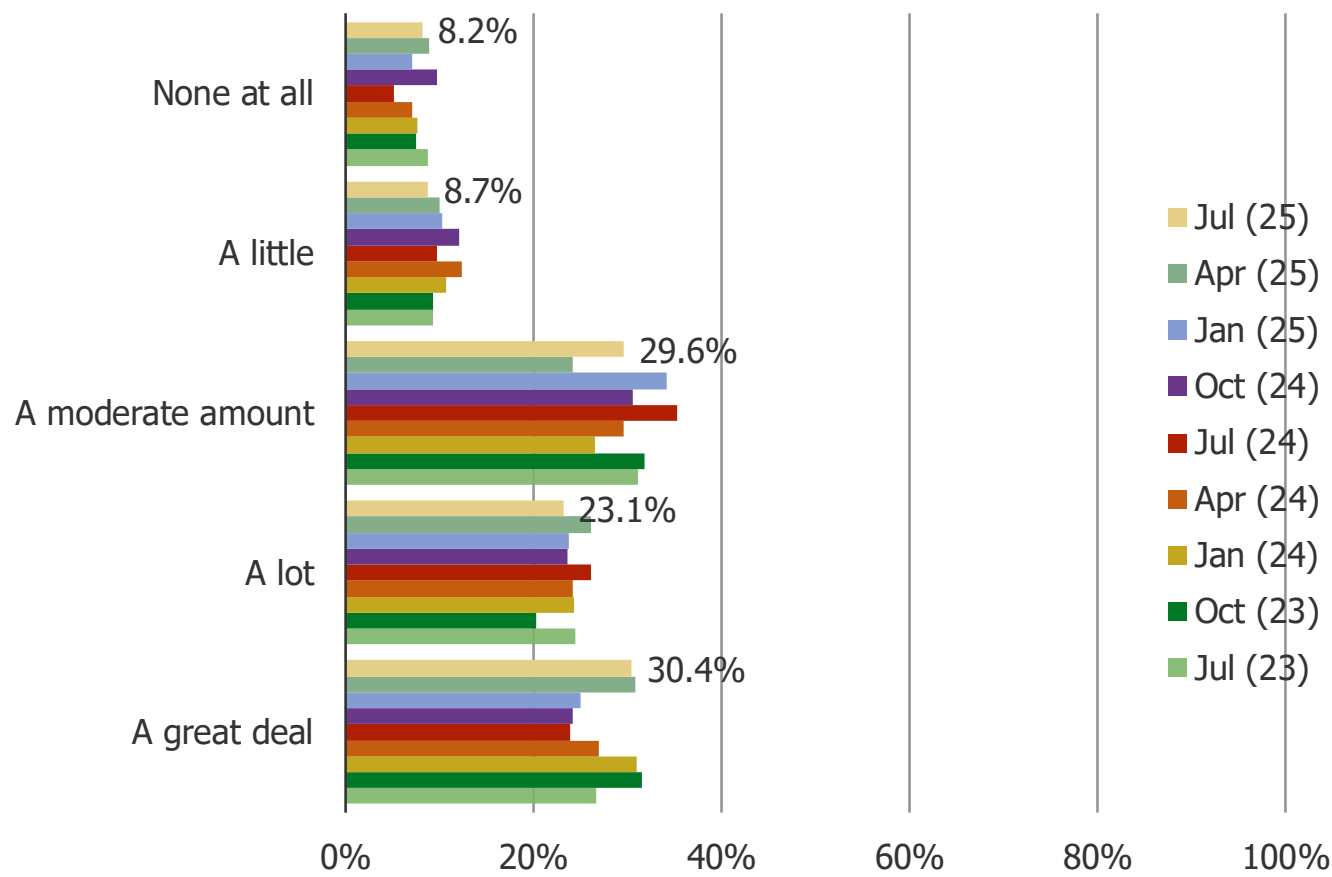
July 2025 Breakout





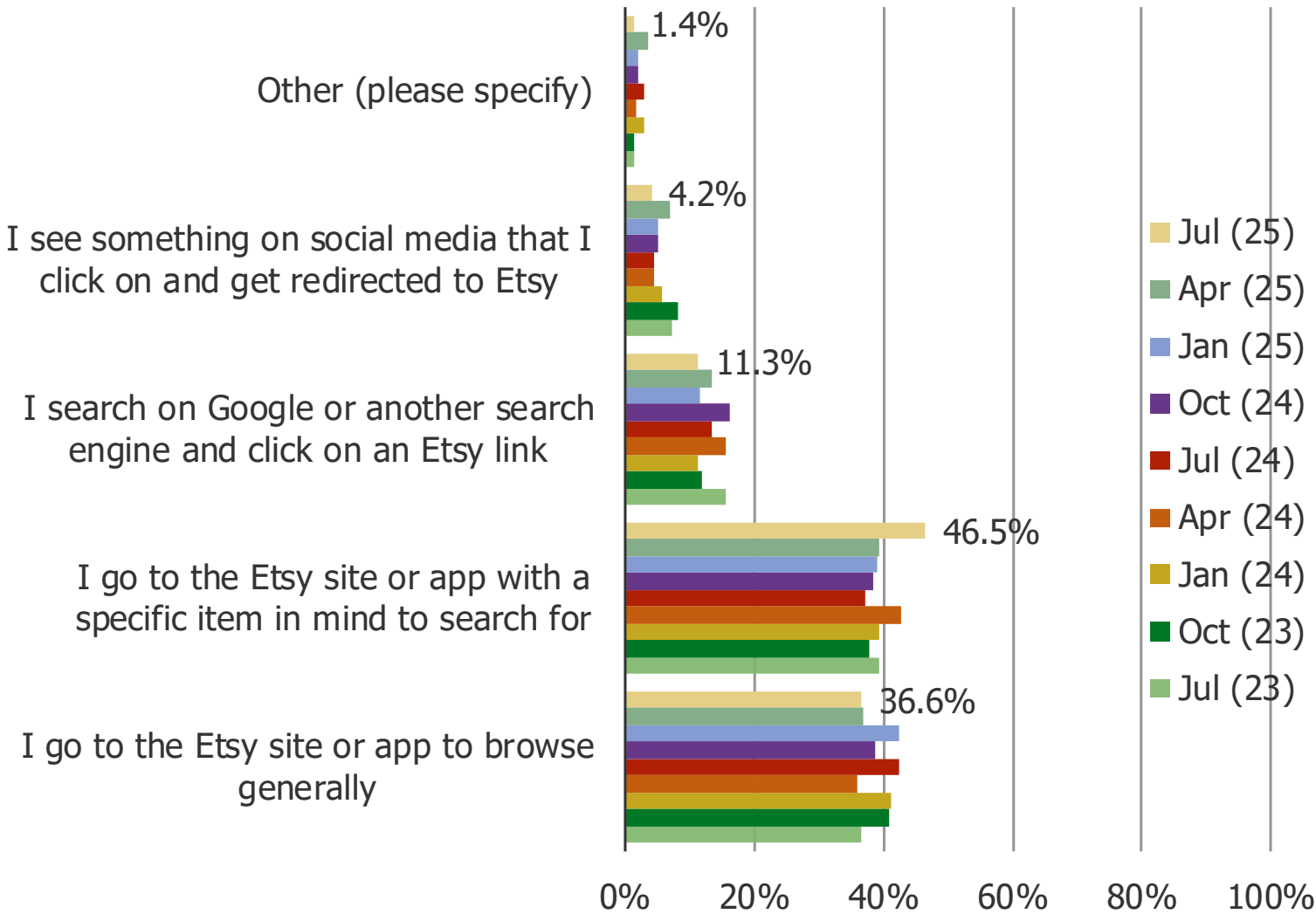
WHEN YOU SHOP ETSY, HOW MUCH DOES IT MATTER TO YOU THAT YOU ARE SUPPORTING SMALL BUSINESSES AND MAKING A POSITIVE IMPACT WITH YOUR PURCHASES?

Posed to all respondents who shop Etsy.



HOW DO YOU MOST COMMONLY FIND YOURSELF SHOPPING ON ETSY?

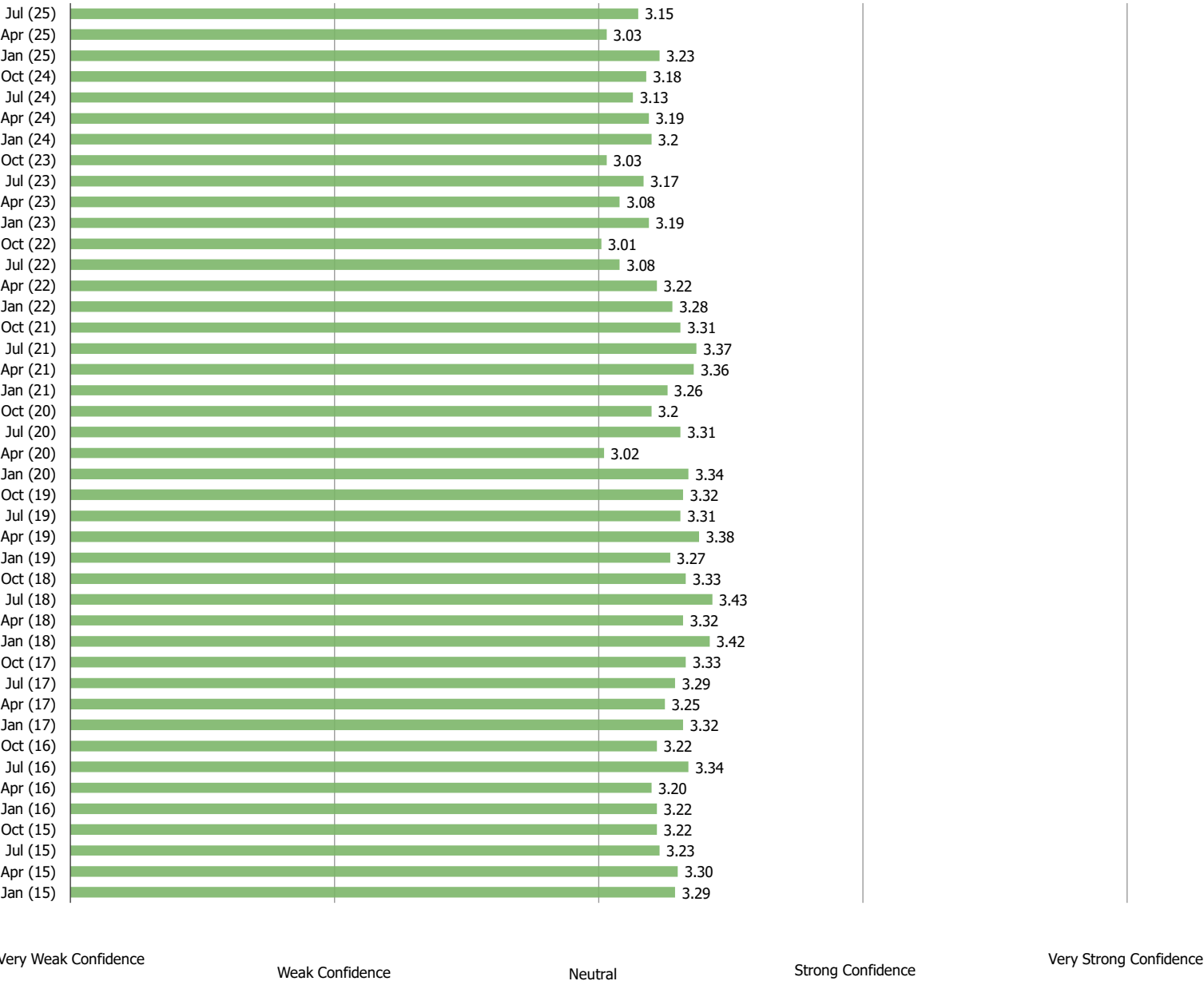
Posed to all respondents who shop Etsy.



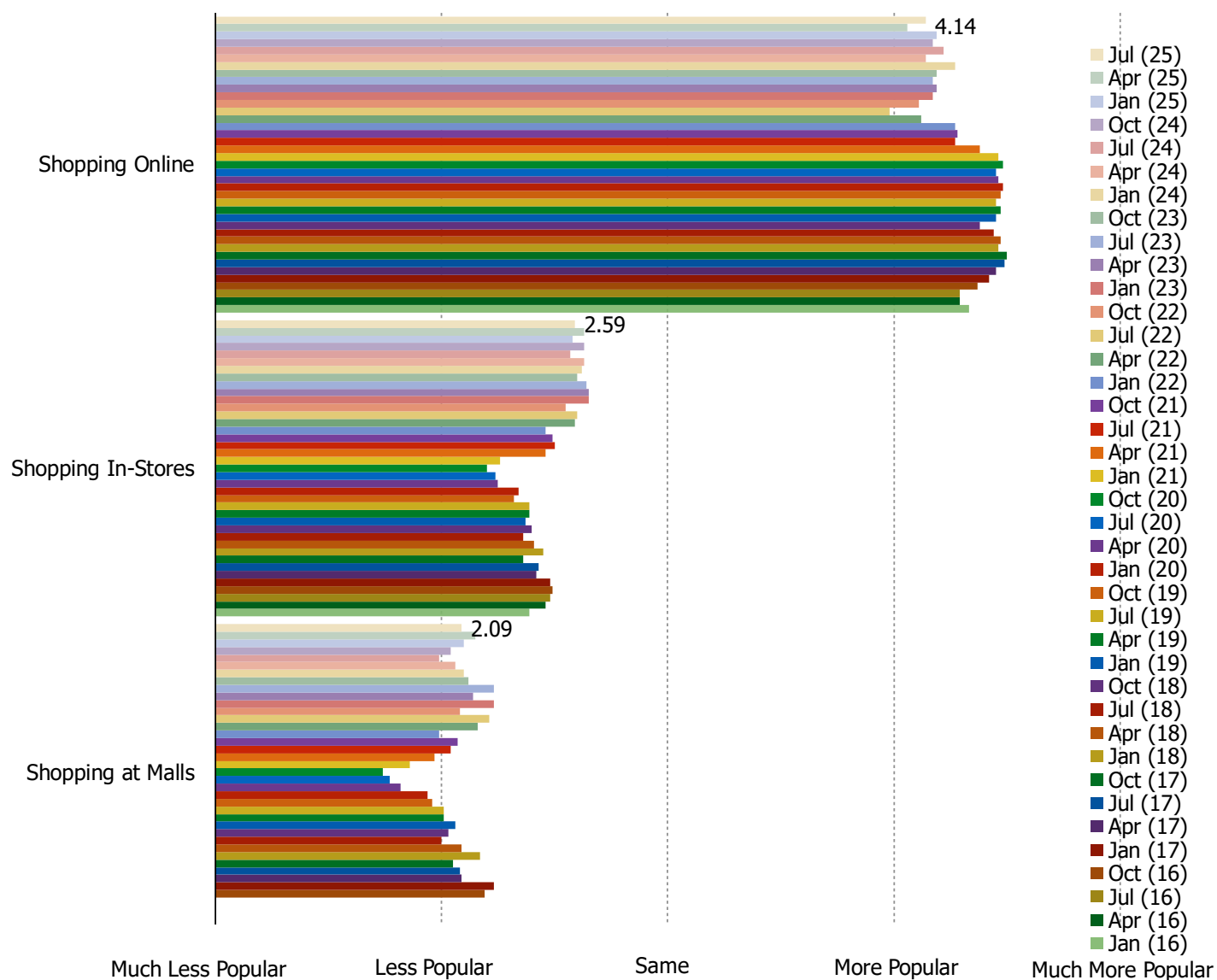
# OVERALL SHOPPING TRENDS

HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

Posed to all respondents



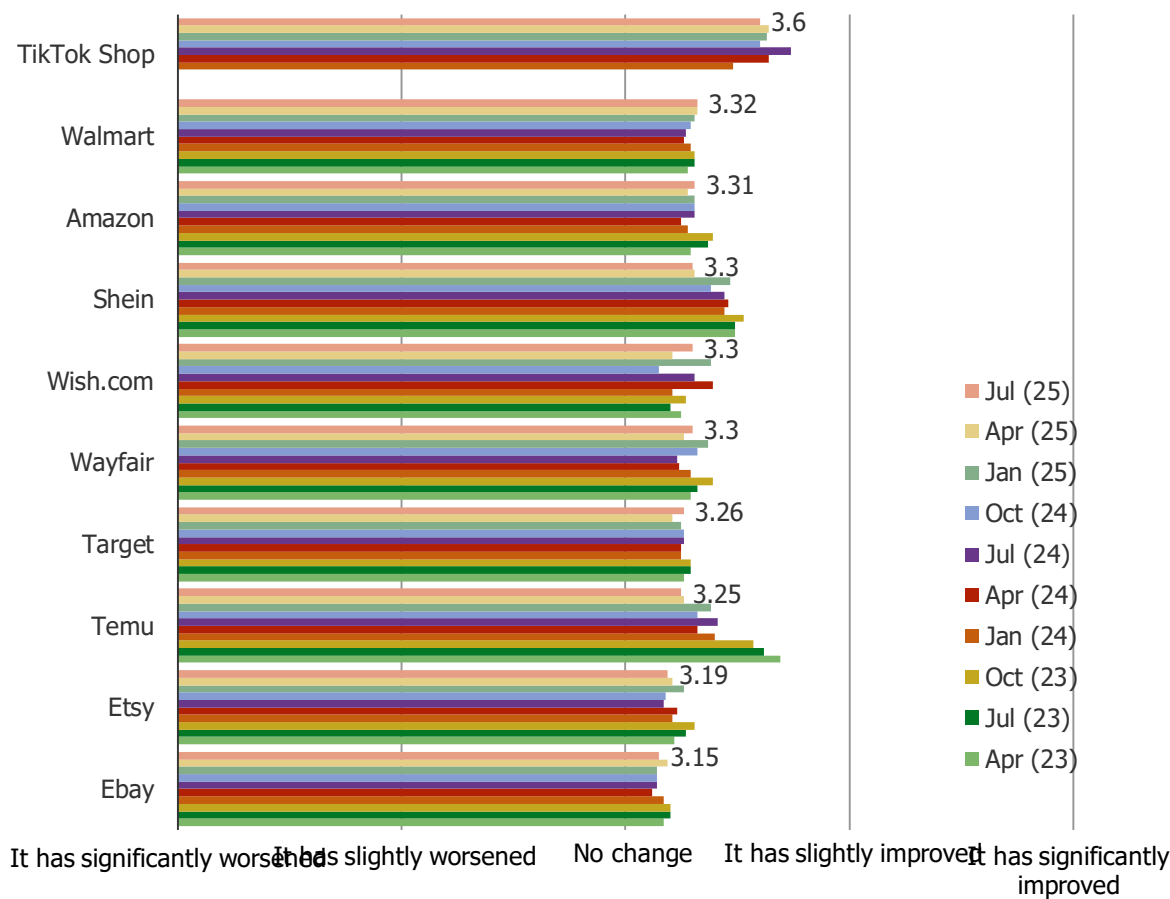
Posed to all respondents



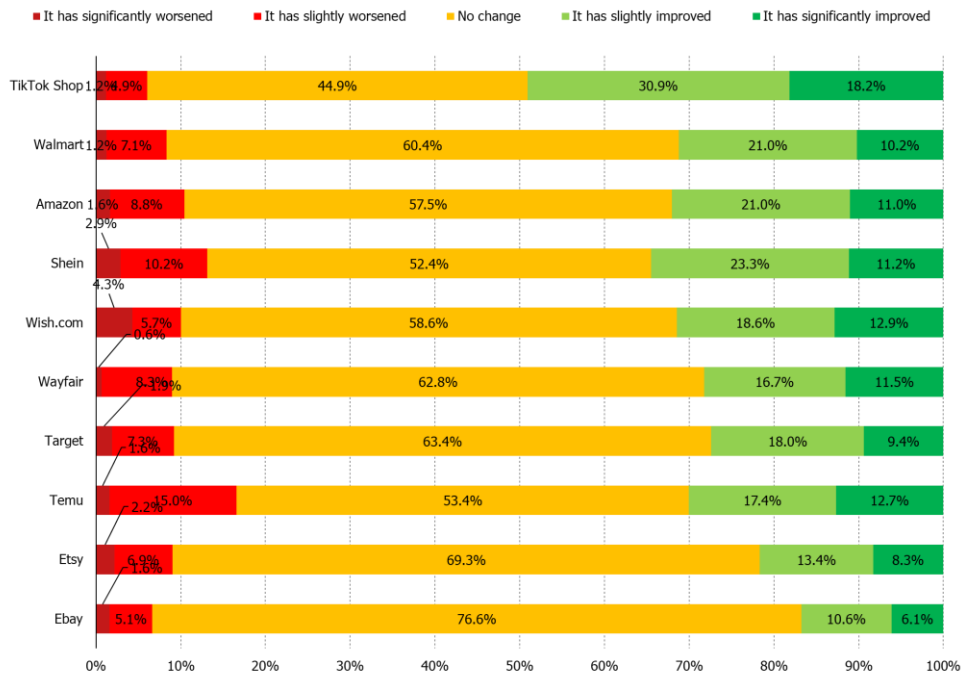
# SALES AND TRUST

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:

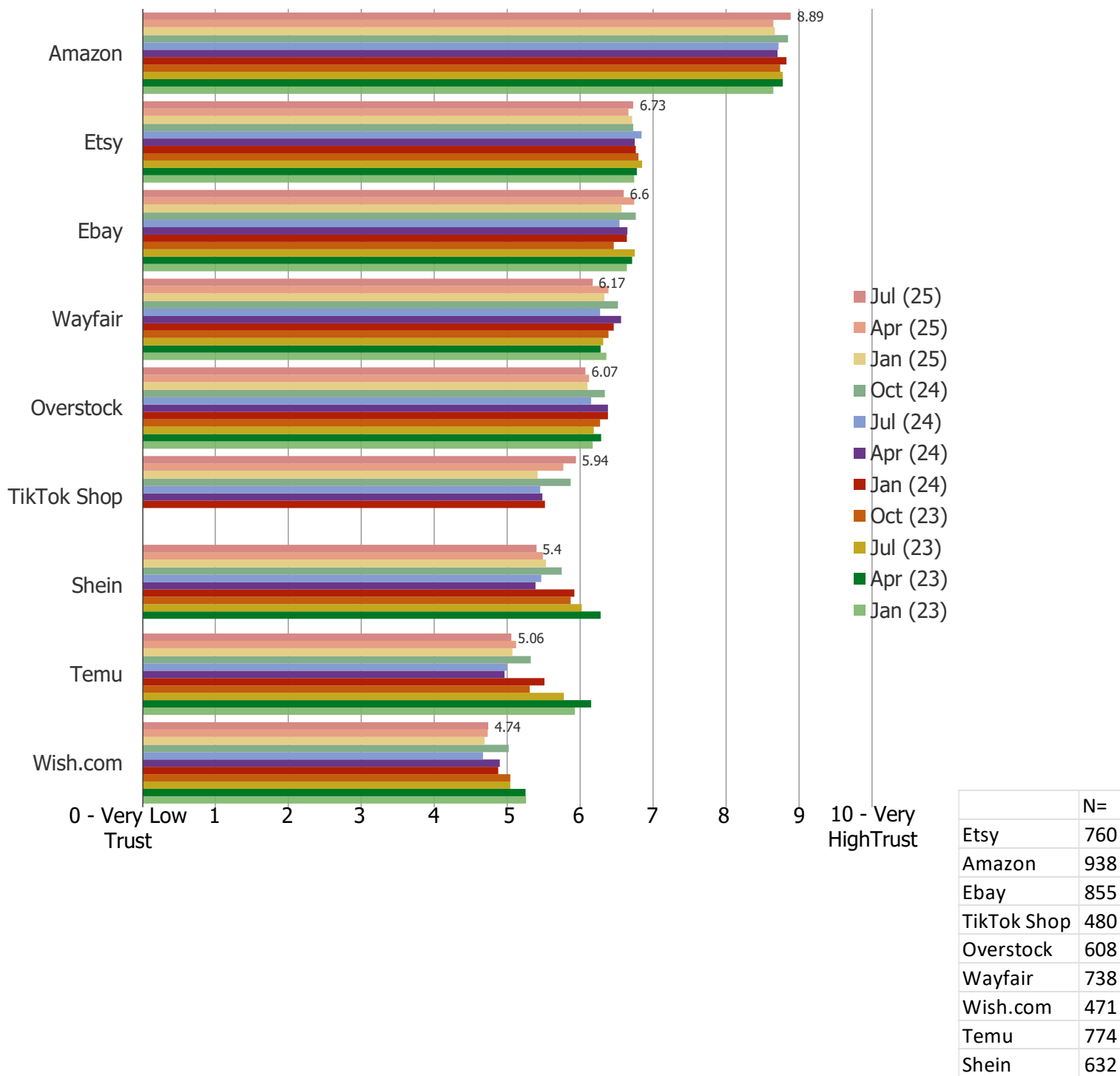


July 2025 Breakout



HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

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

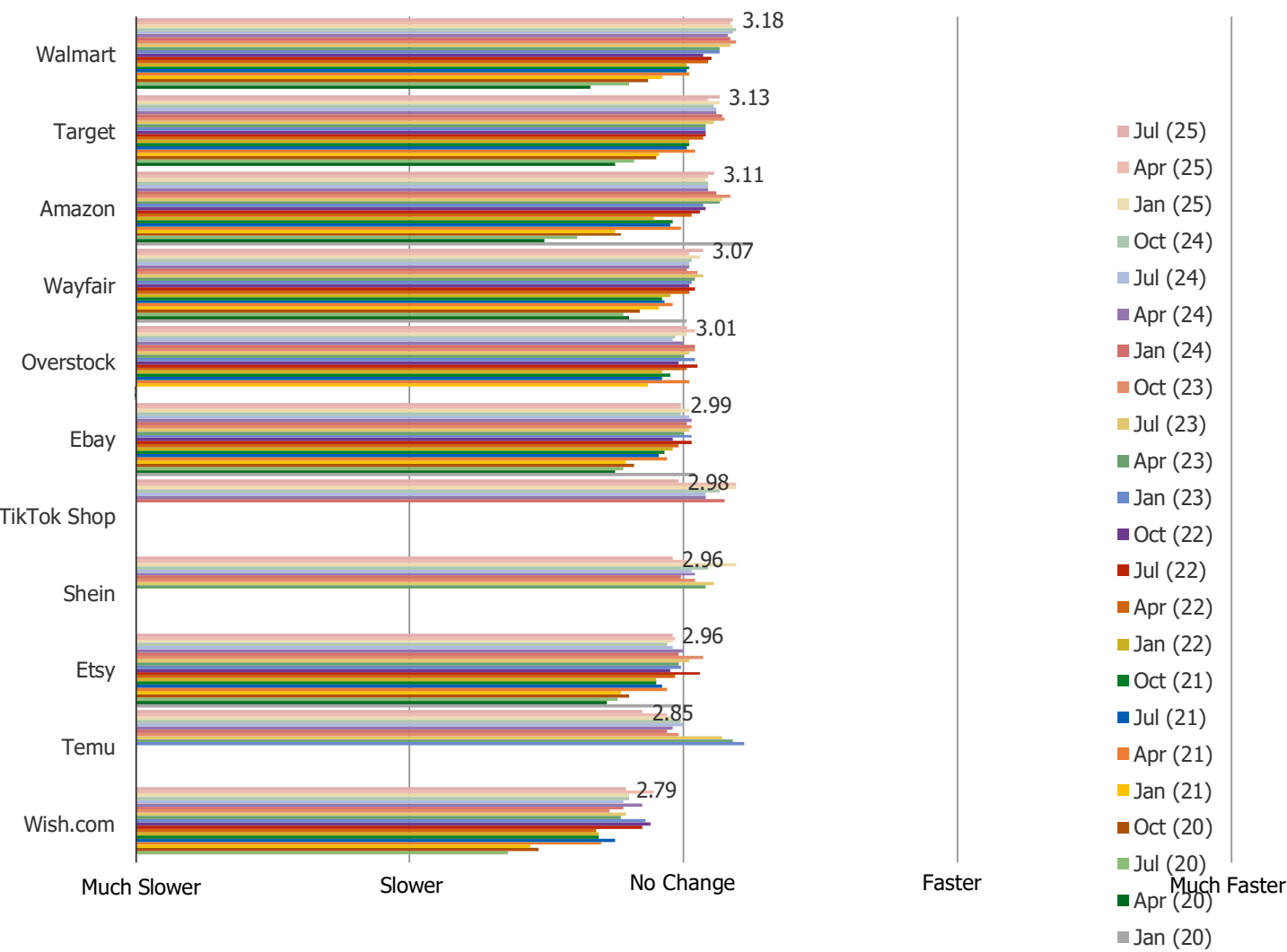




# SHIPPING

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

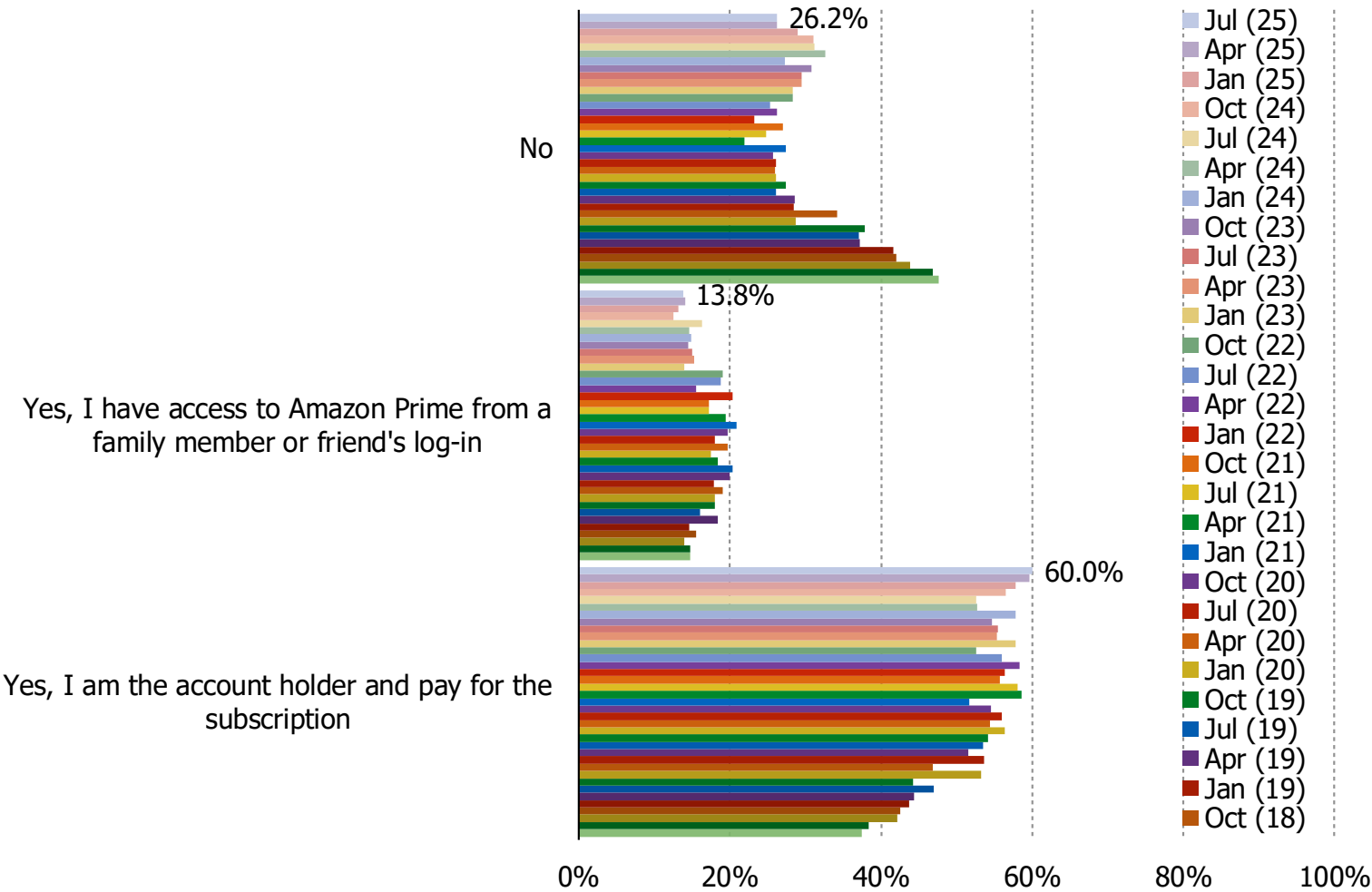
Posed to users of each site/app.



AMZN PRIME TRENDS

ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

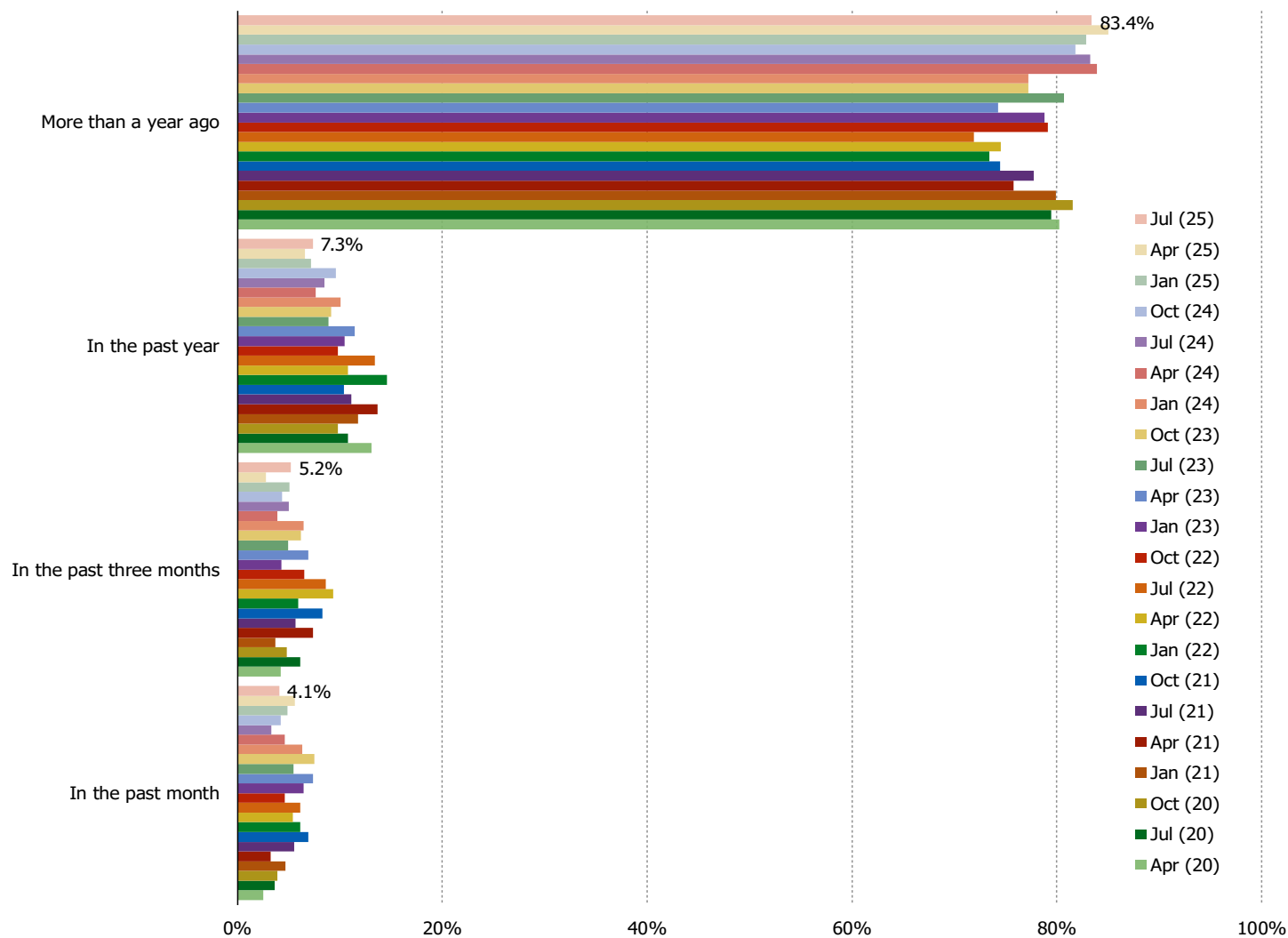
Posed to Amazon users



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.

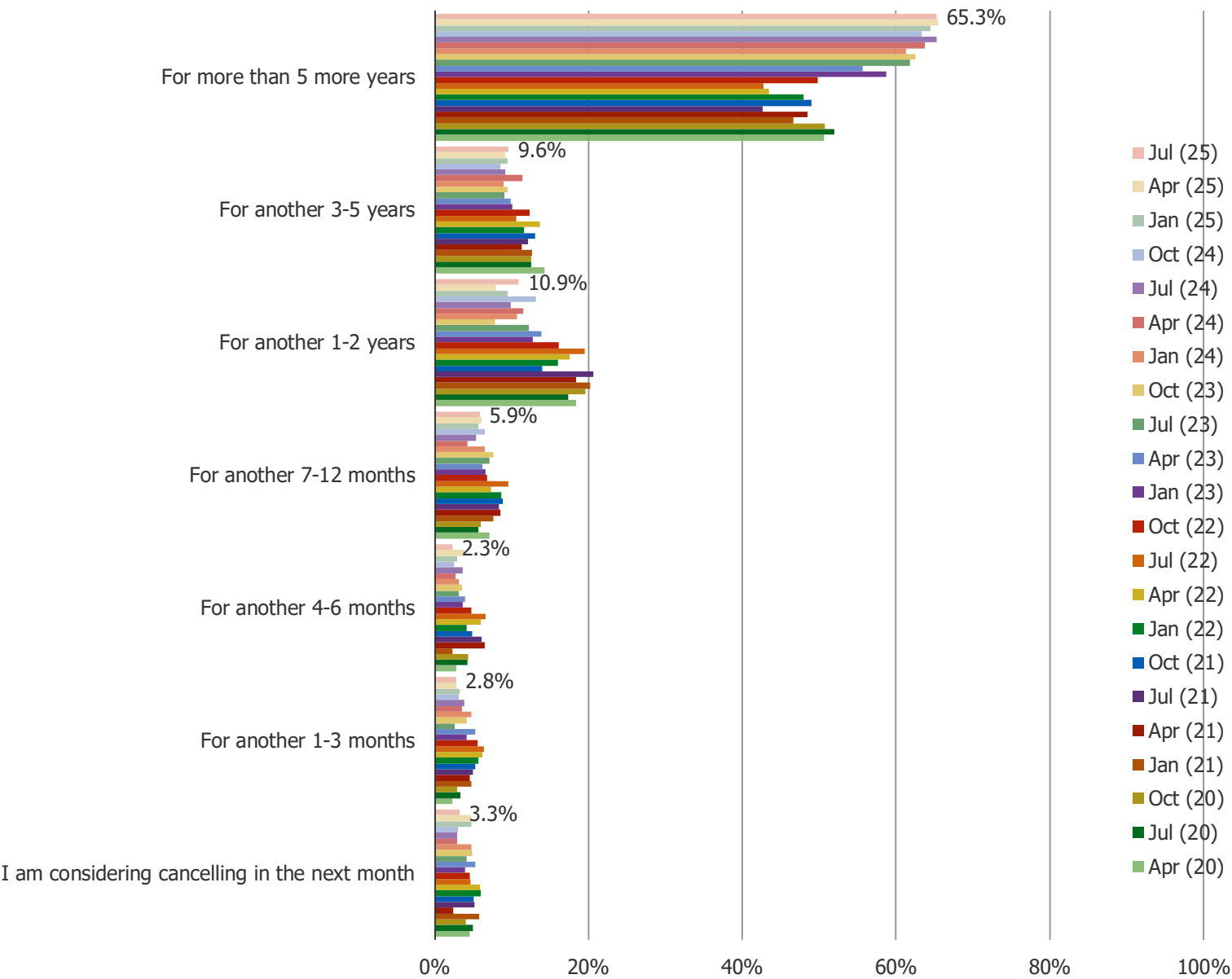
WHEN DID YOU START YOUR CURRENT AMAZON PRIME MEMBERSHIP?

Posed to Amazon users who are Prime members.



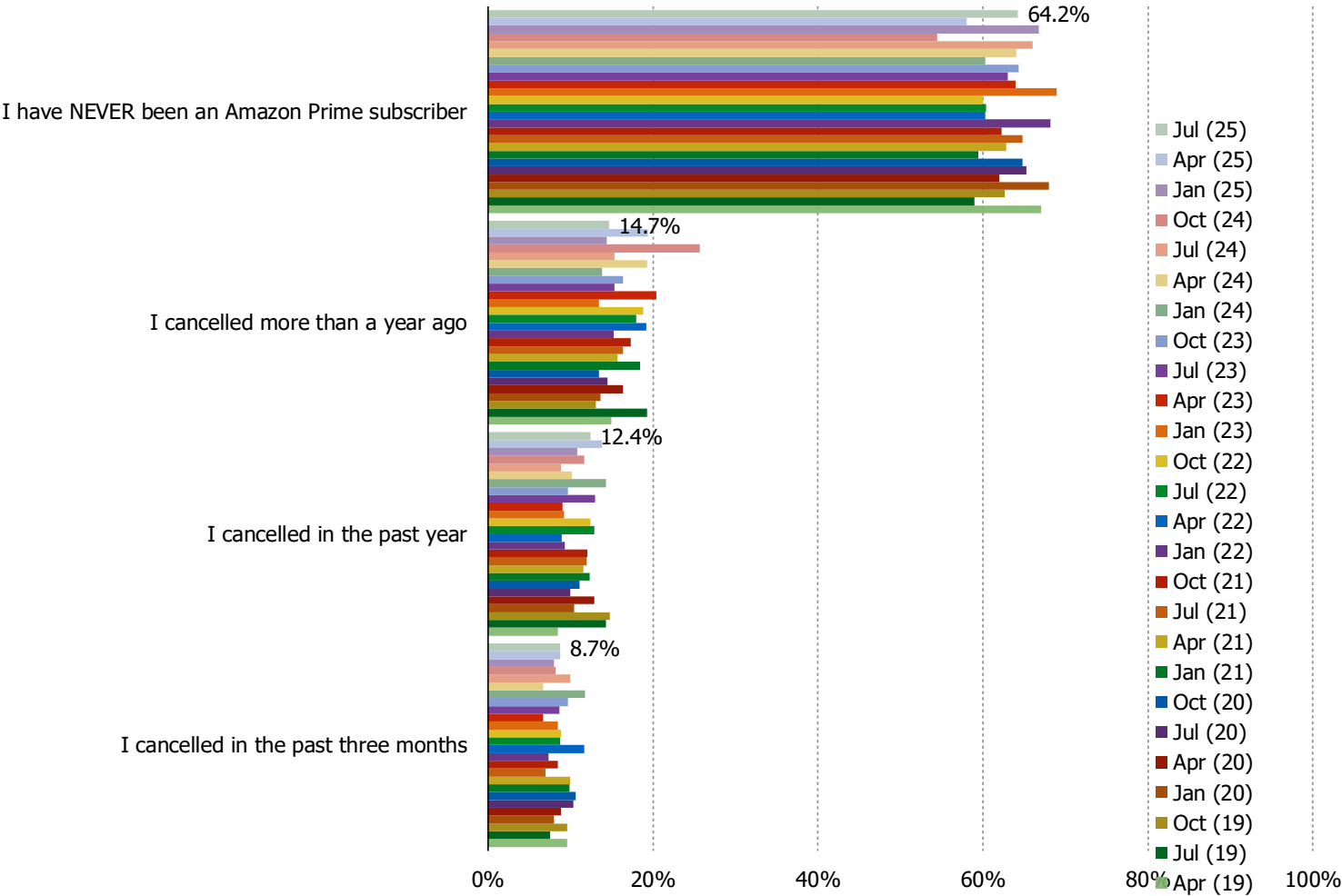
FOR HOW MUCH LONGER DO YOU INTEND TO BE AN AMAZON PRIME MEMBER?

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

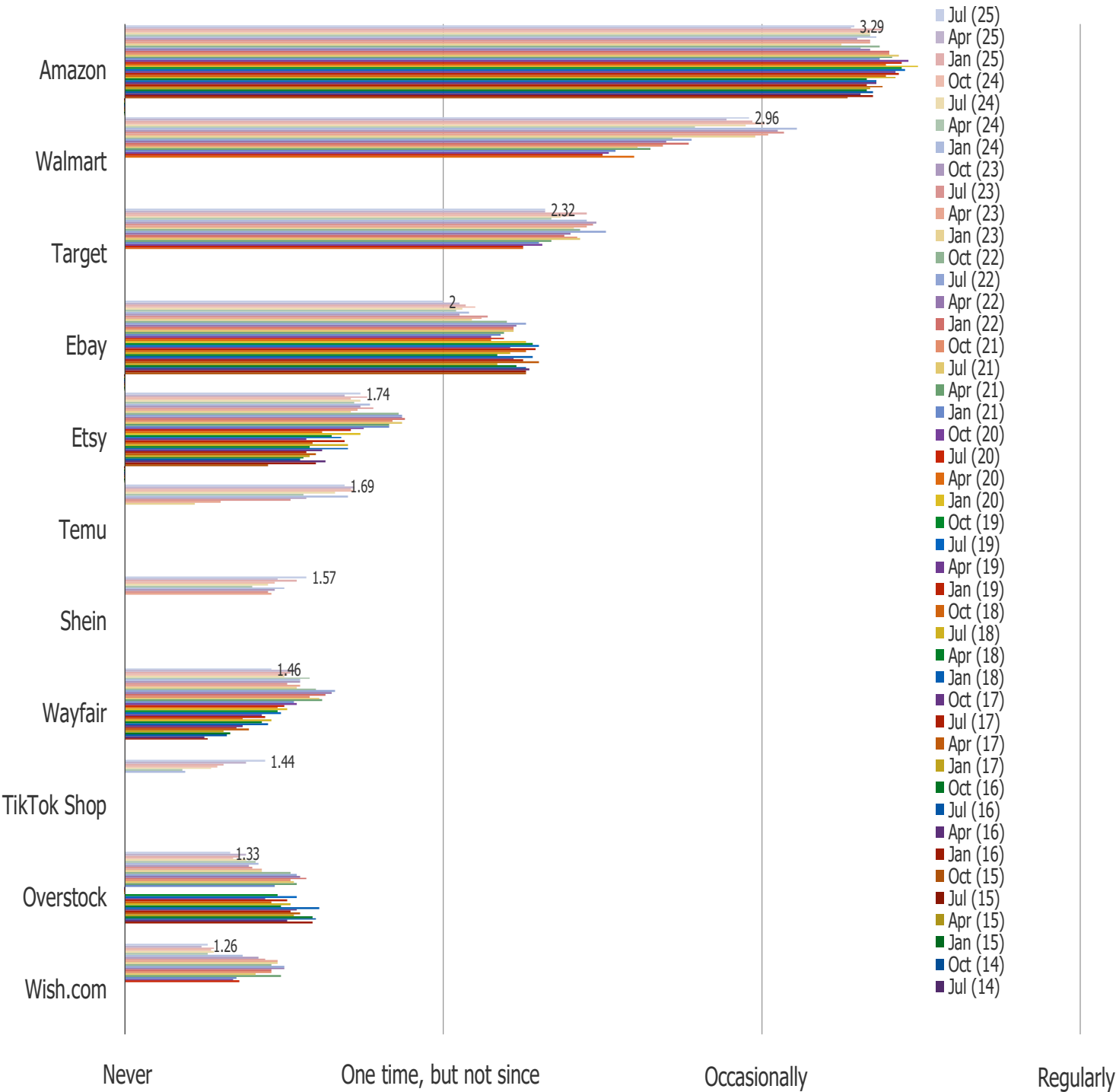


# COMPETITIVE DYNAMICS



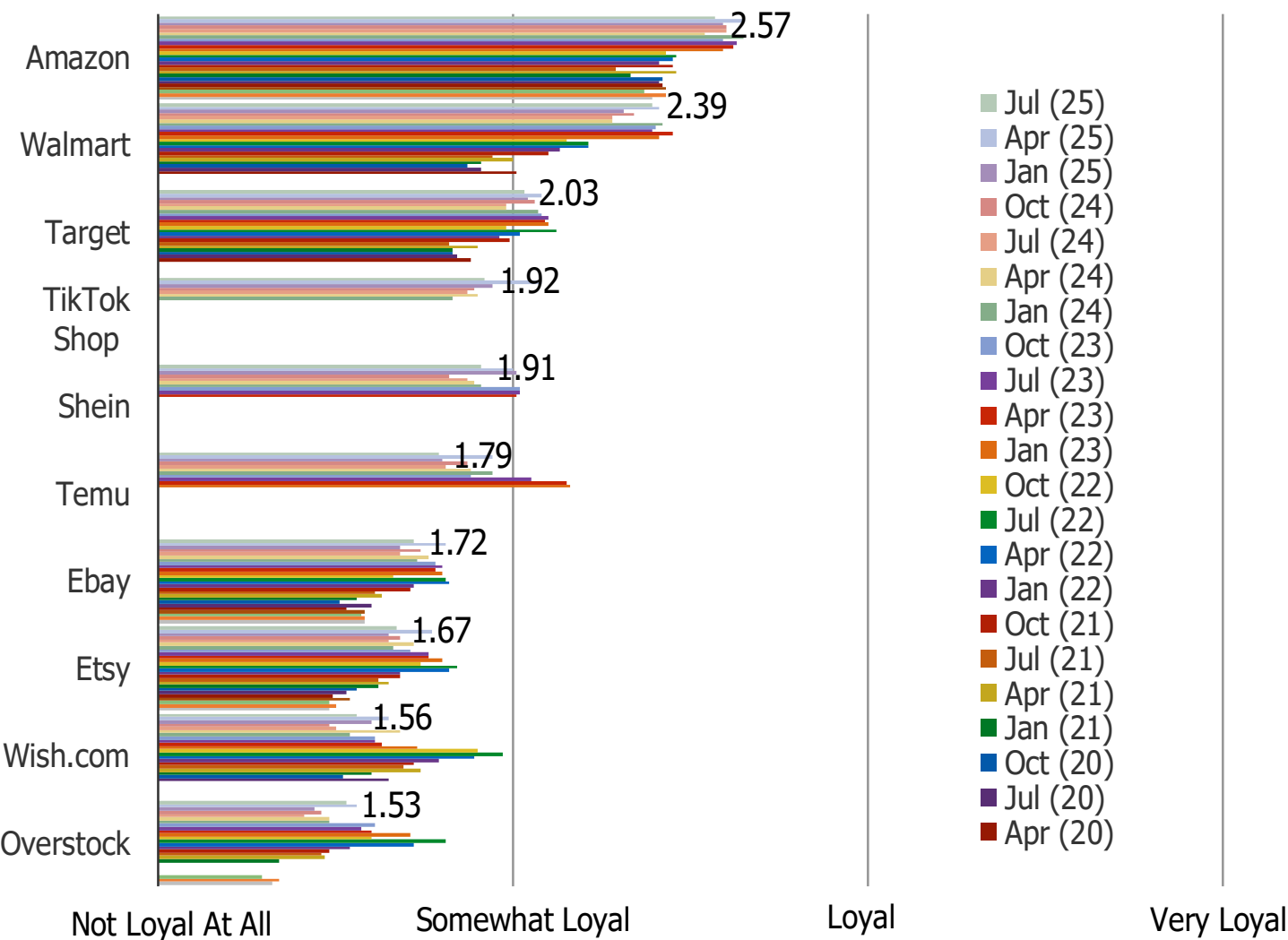
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



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

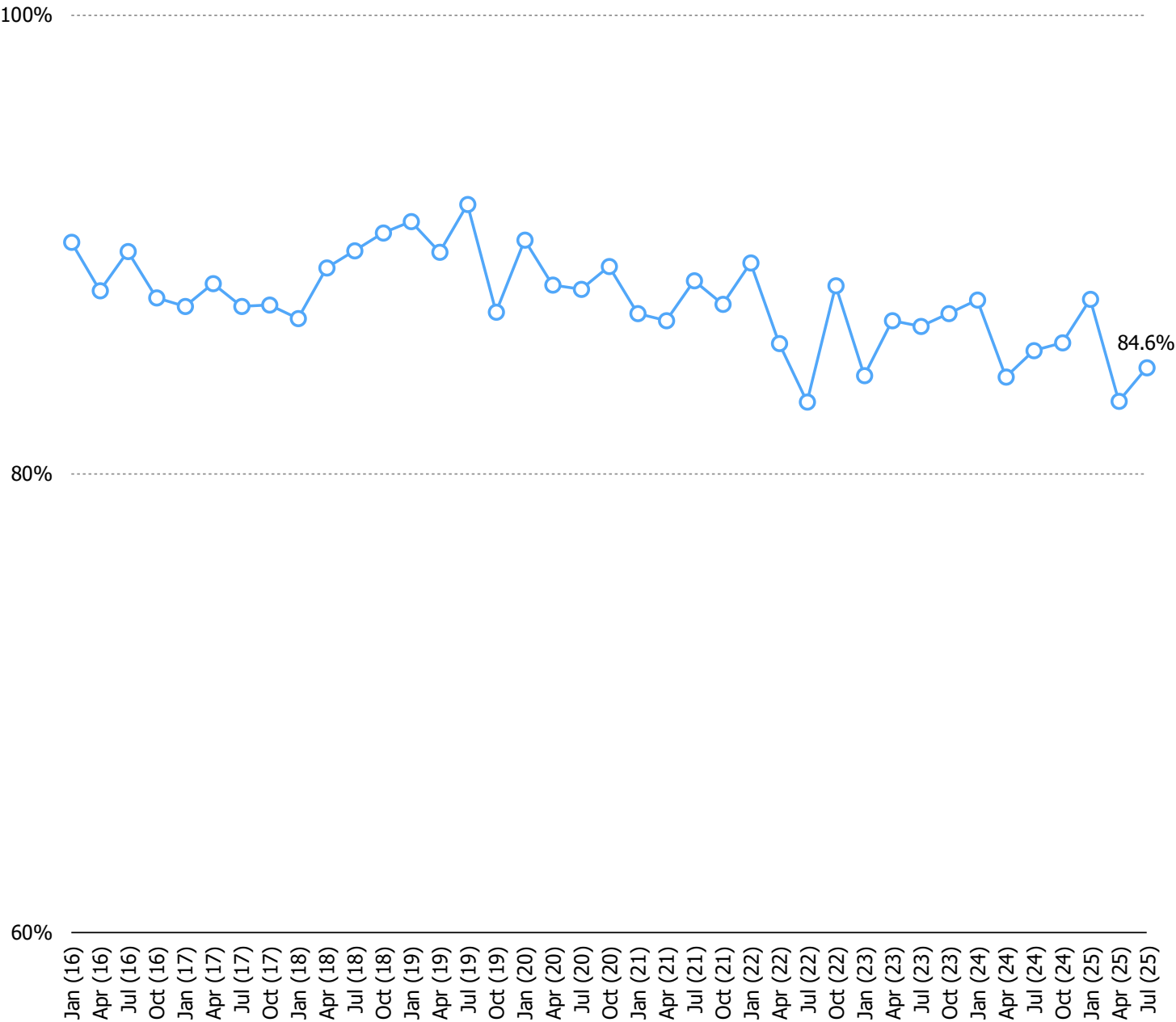
Posed to users of each site/app



# AMZN TRENDS

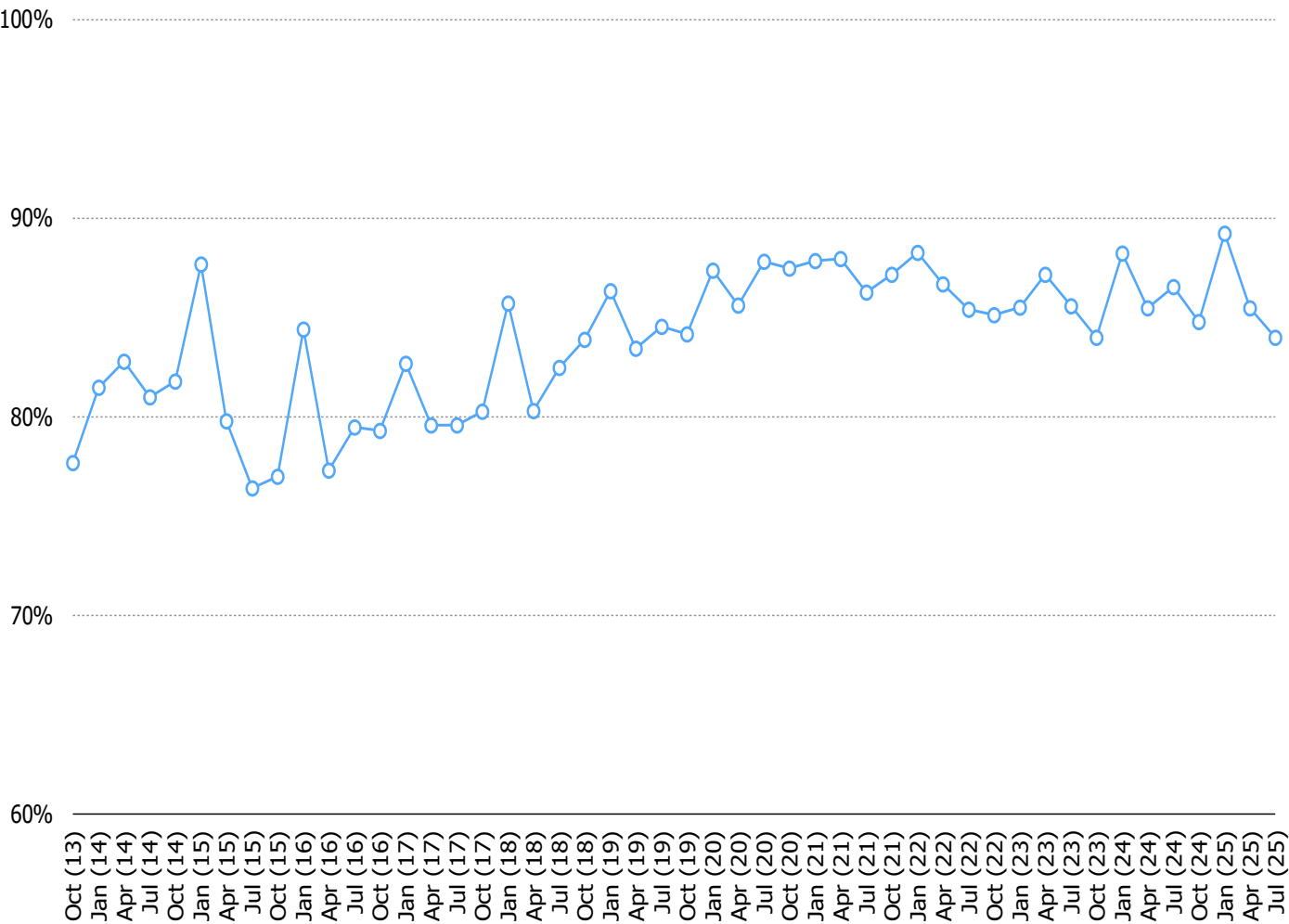
DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.



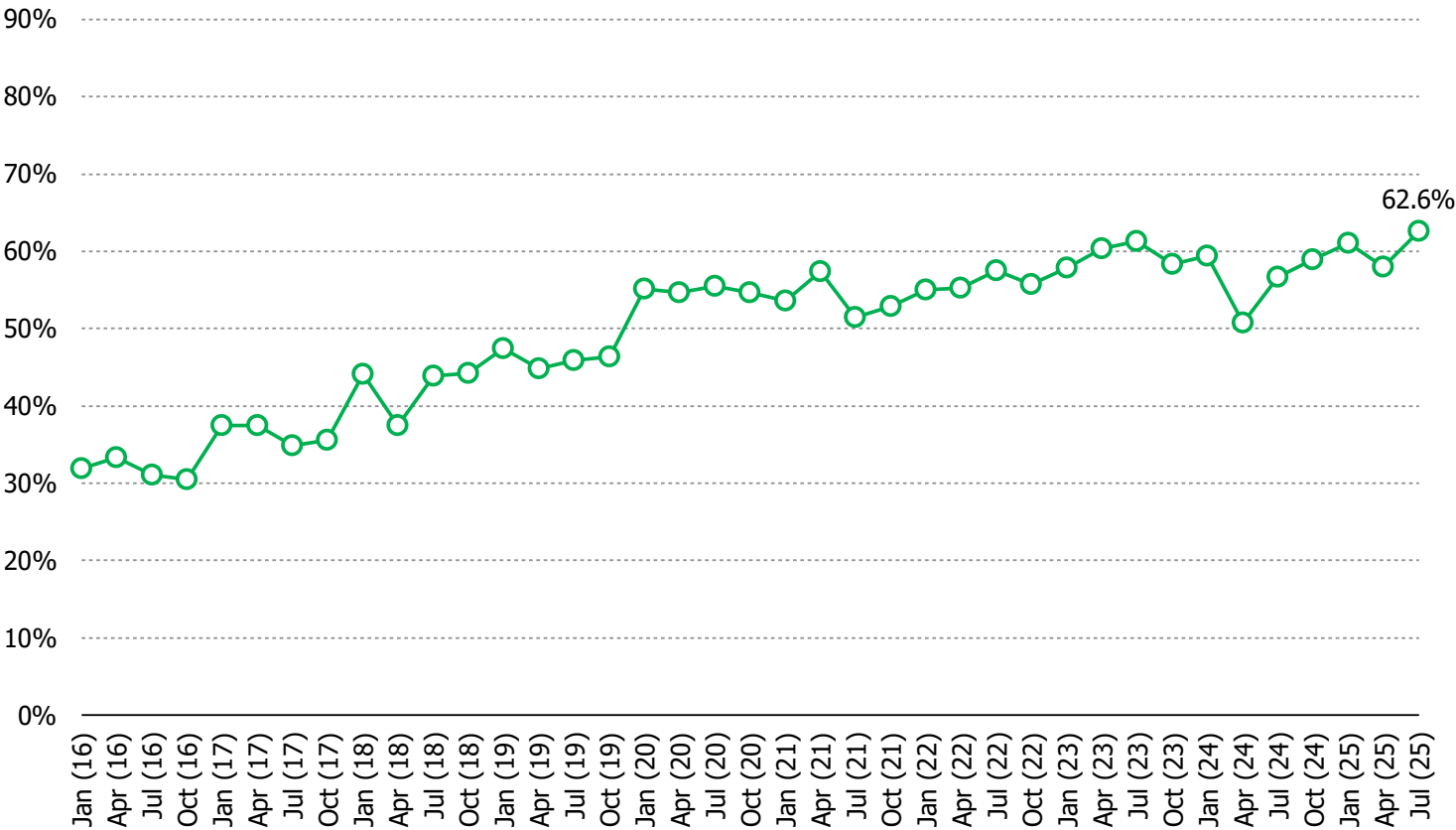
AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

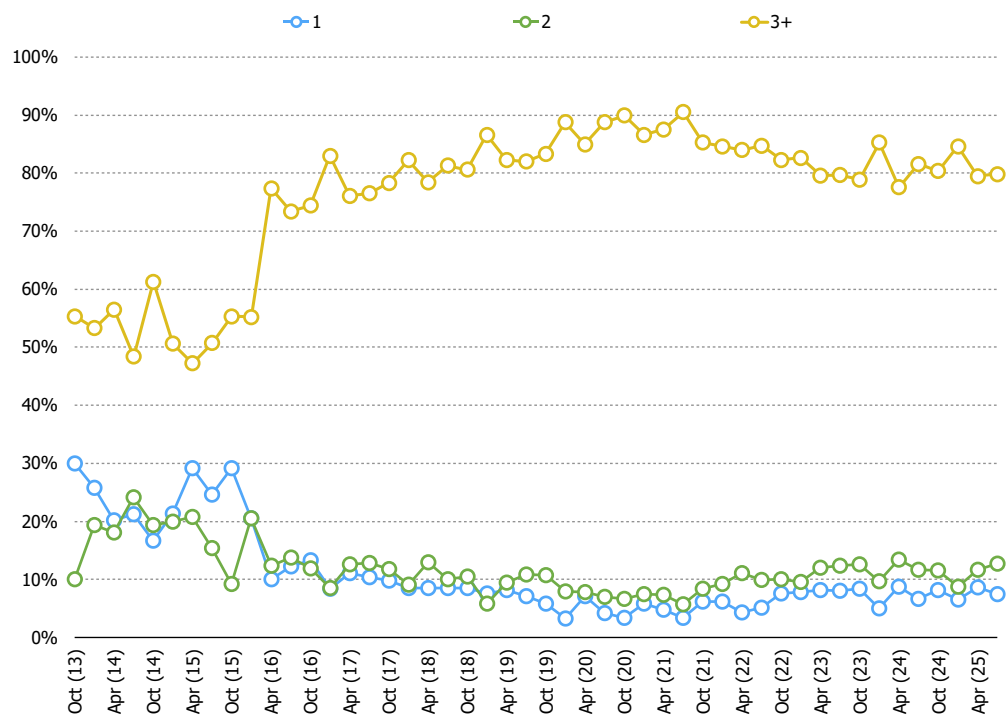


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

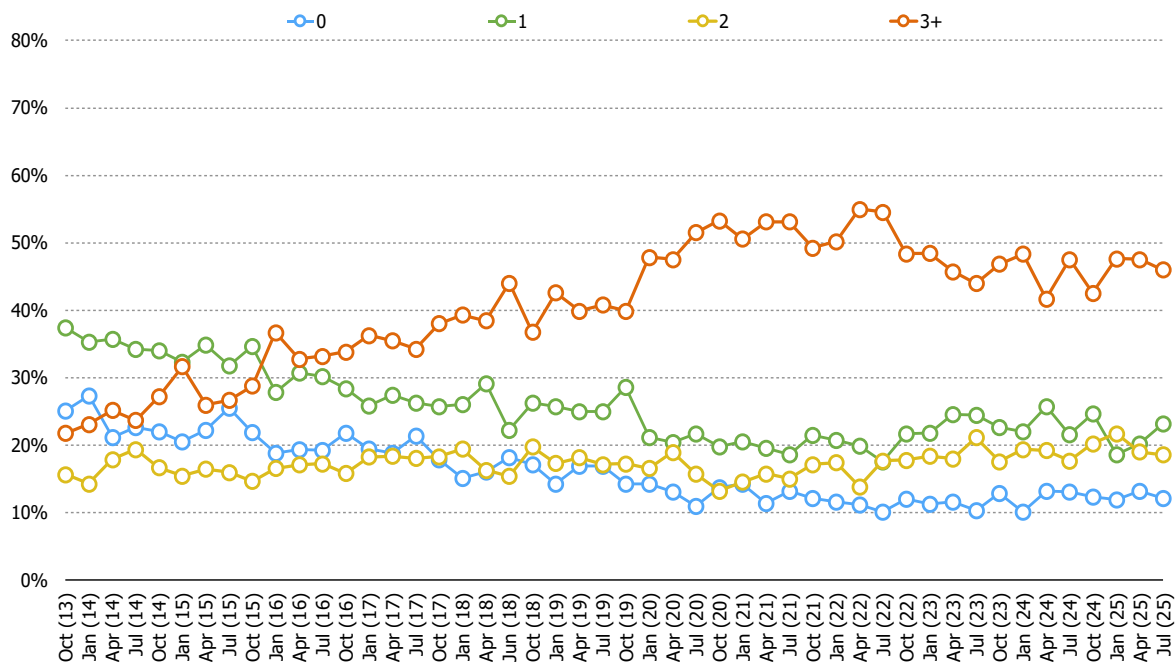
Posed to Amazon users



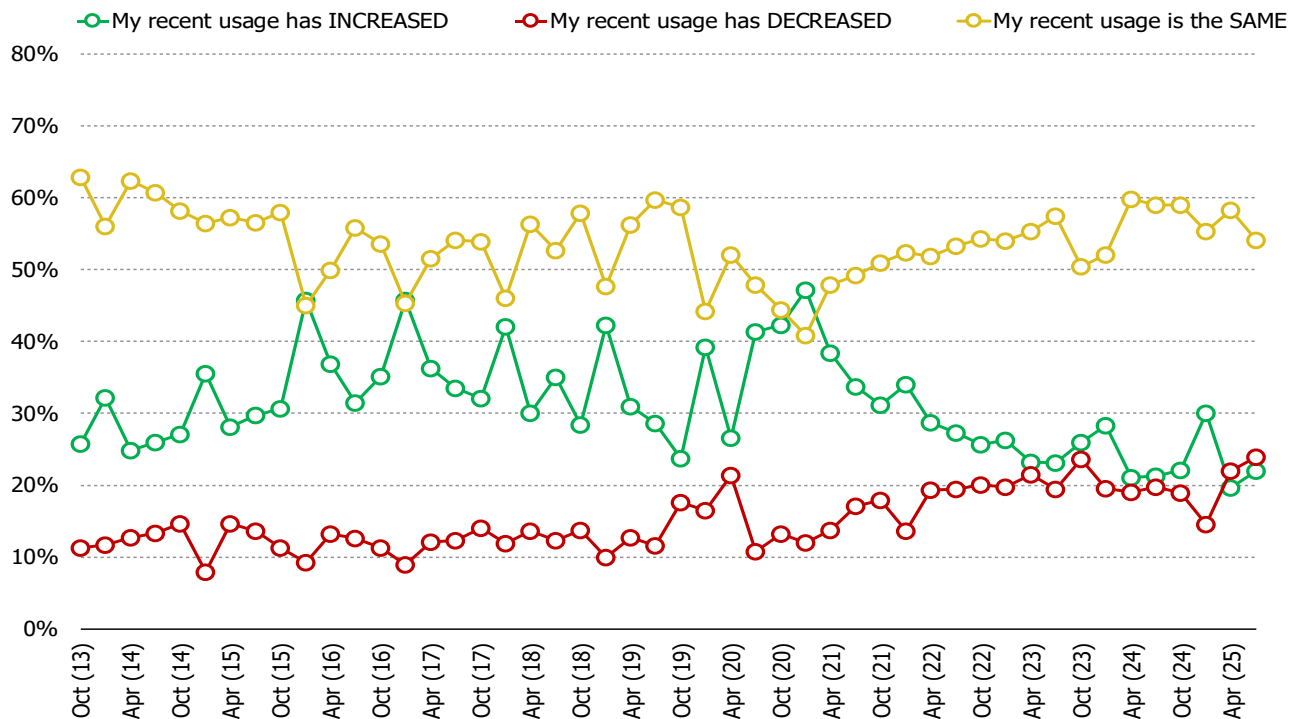
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



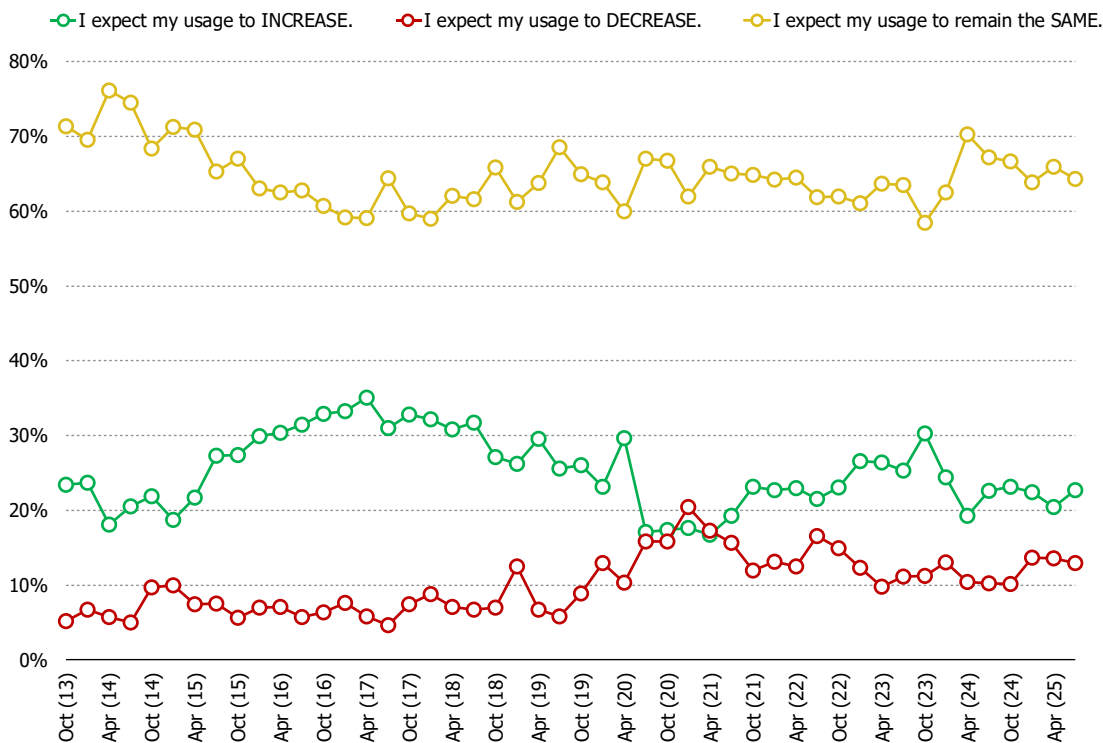
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



AMAZON USERS – RECENT USAGE



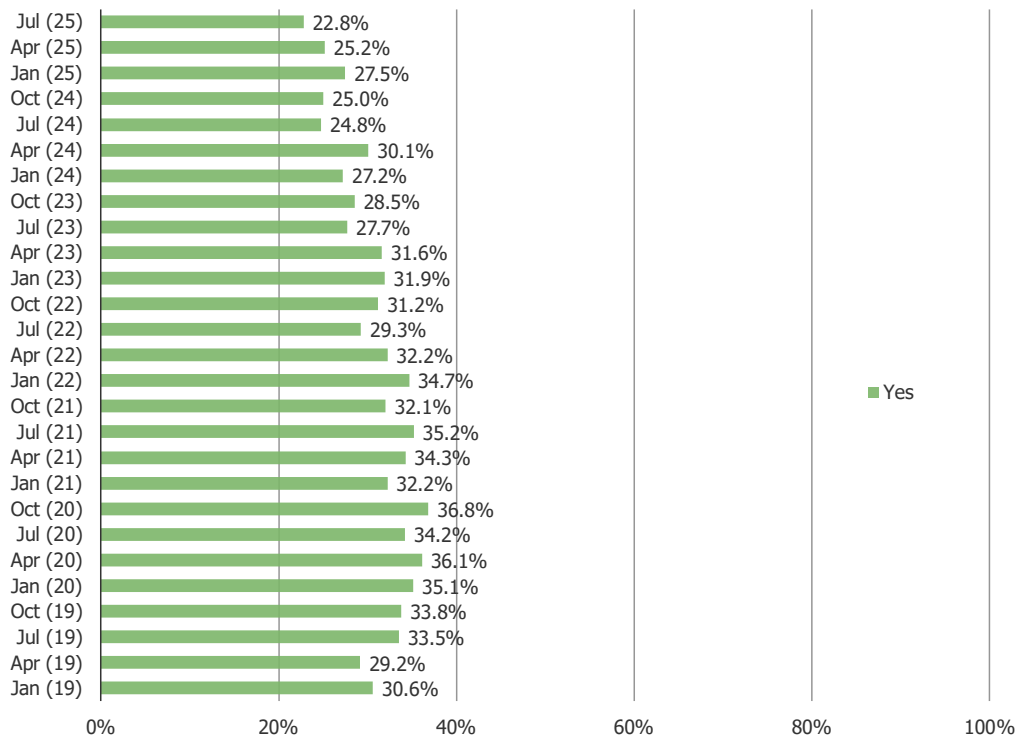
AMAZON USERS – EXPECTED USAGE



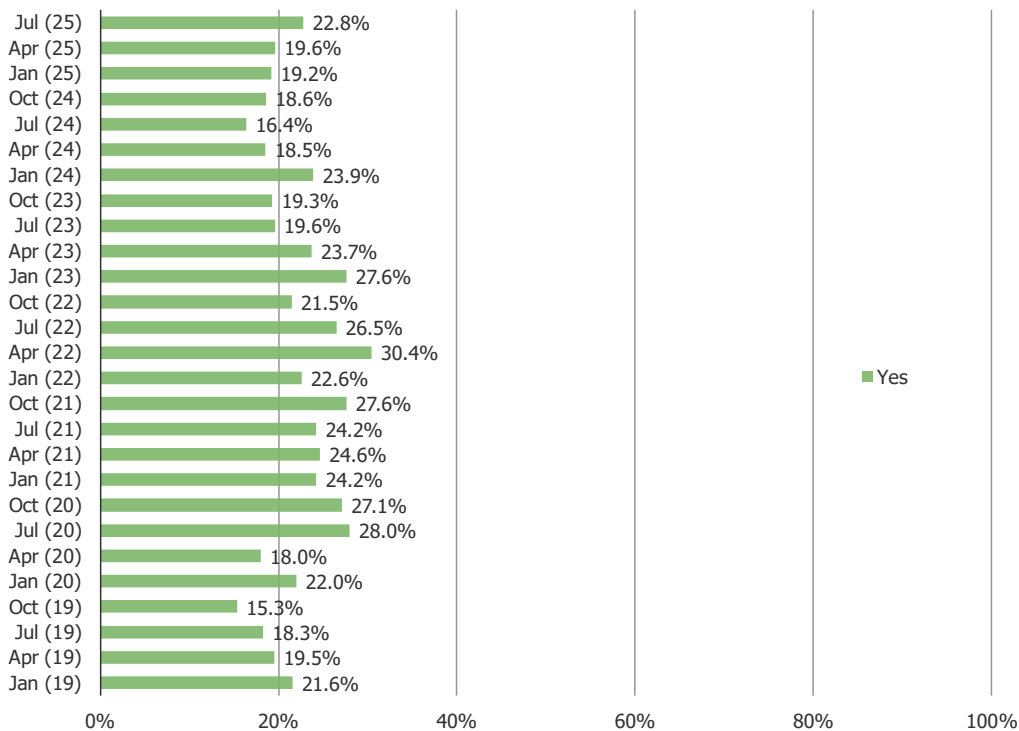


# WAYFAIR TRENDS

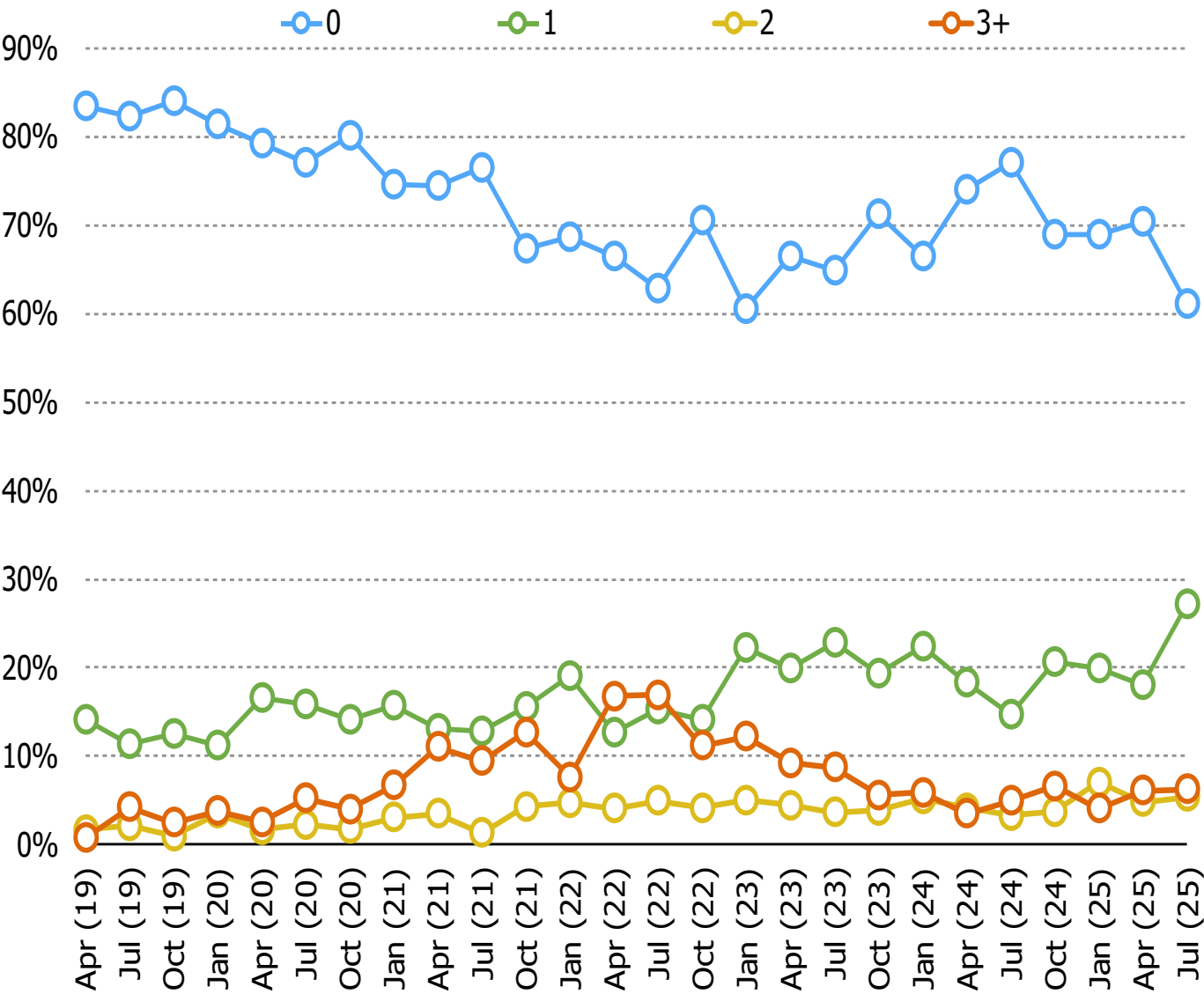
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



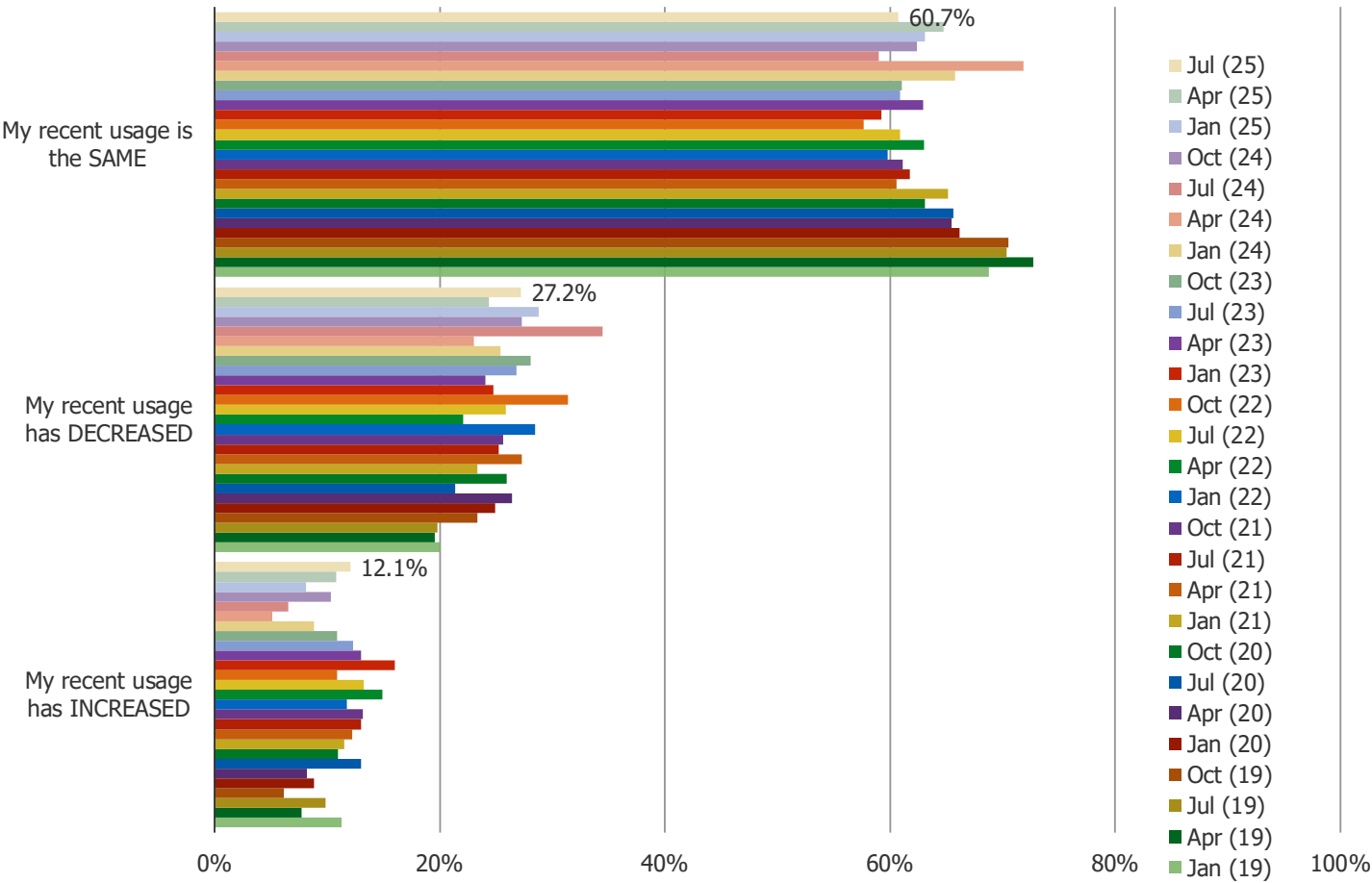
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?



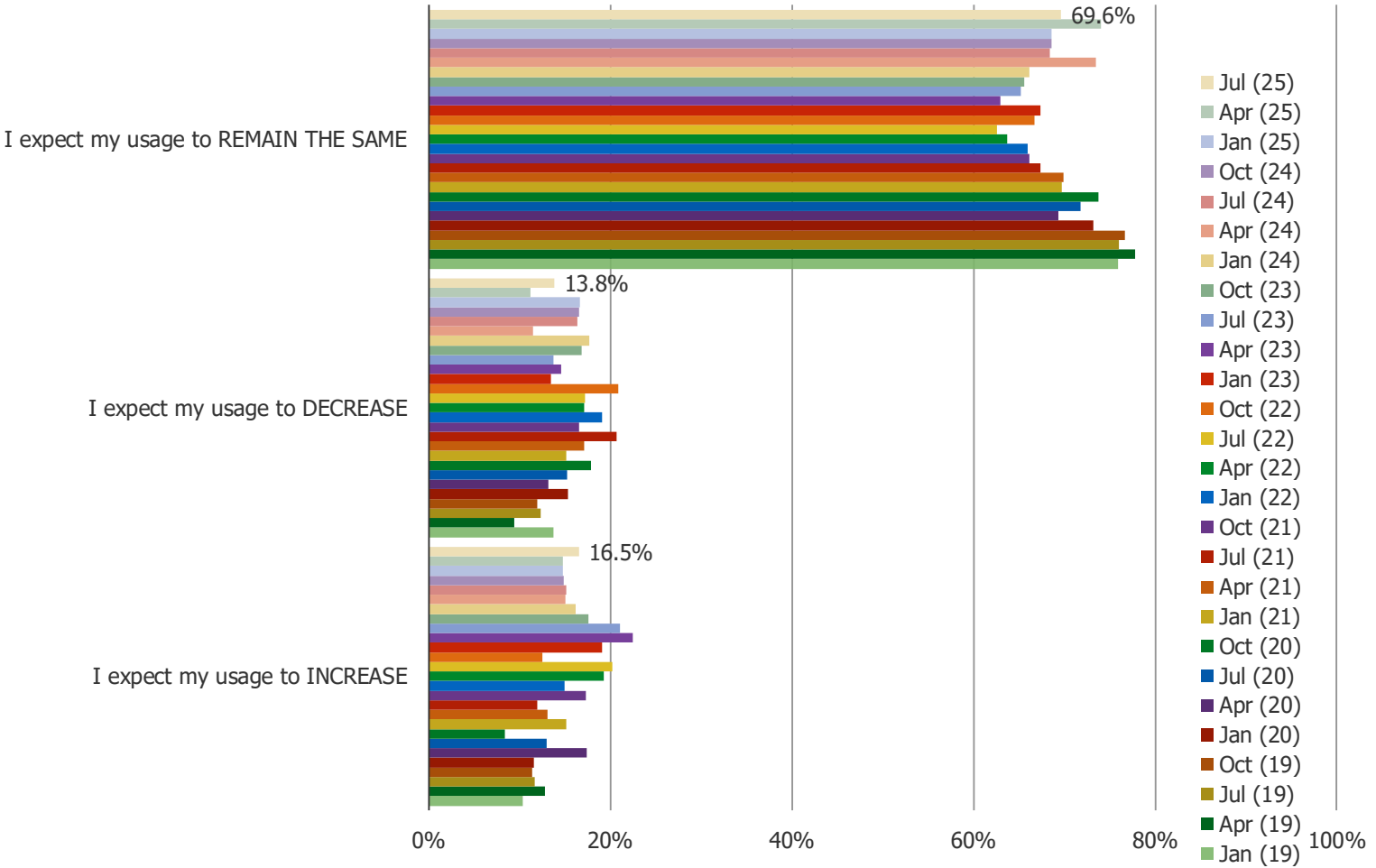
WAYFAIR USERS - ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



WAYFAIR USERS – RECENT USAGE



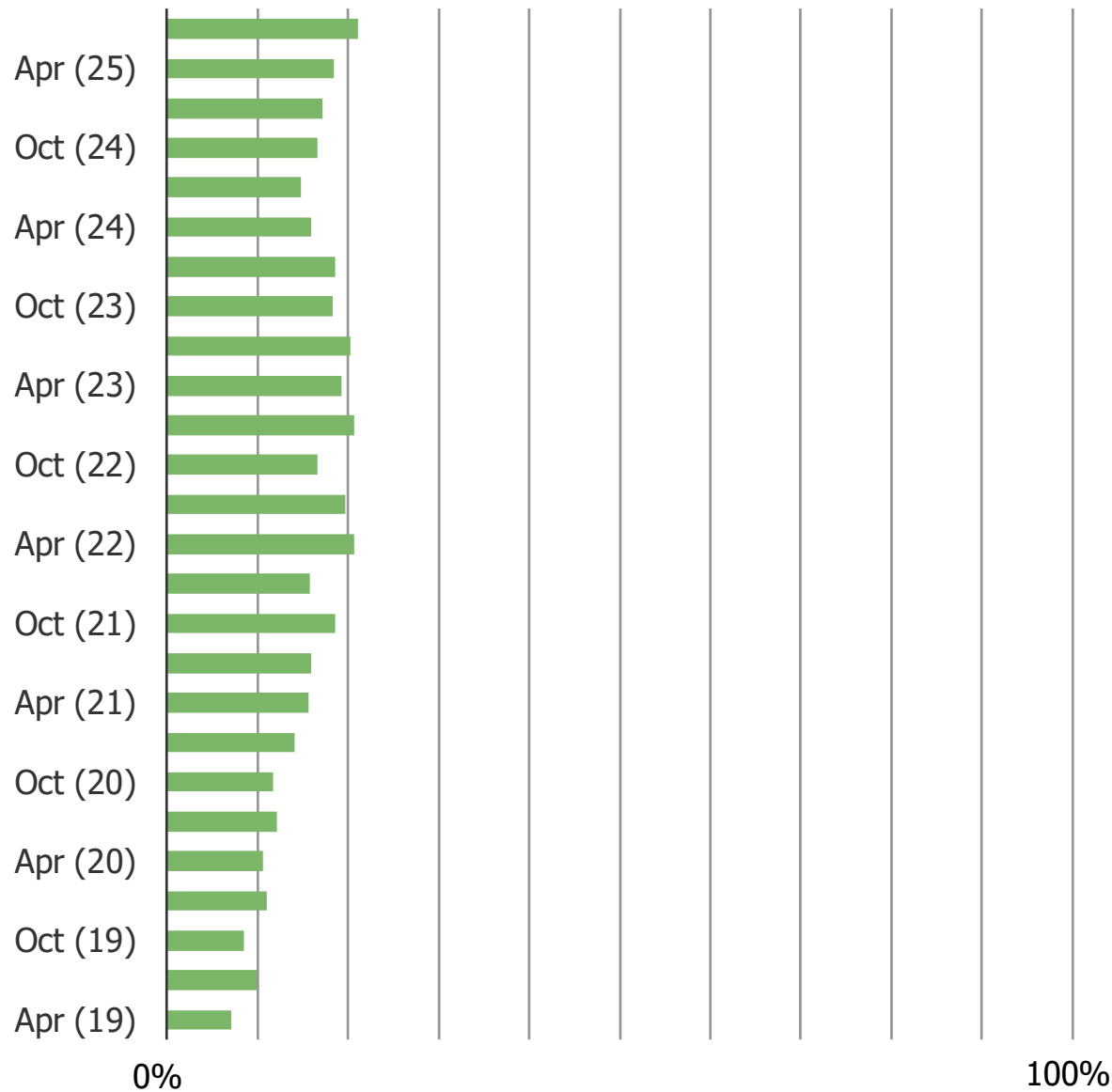
WAYFAIR USERS – EXPECTED USAGE



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

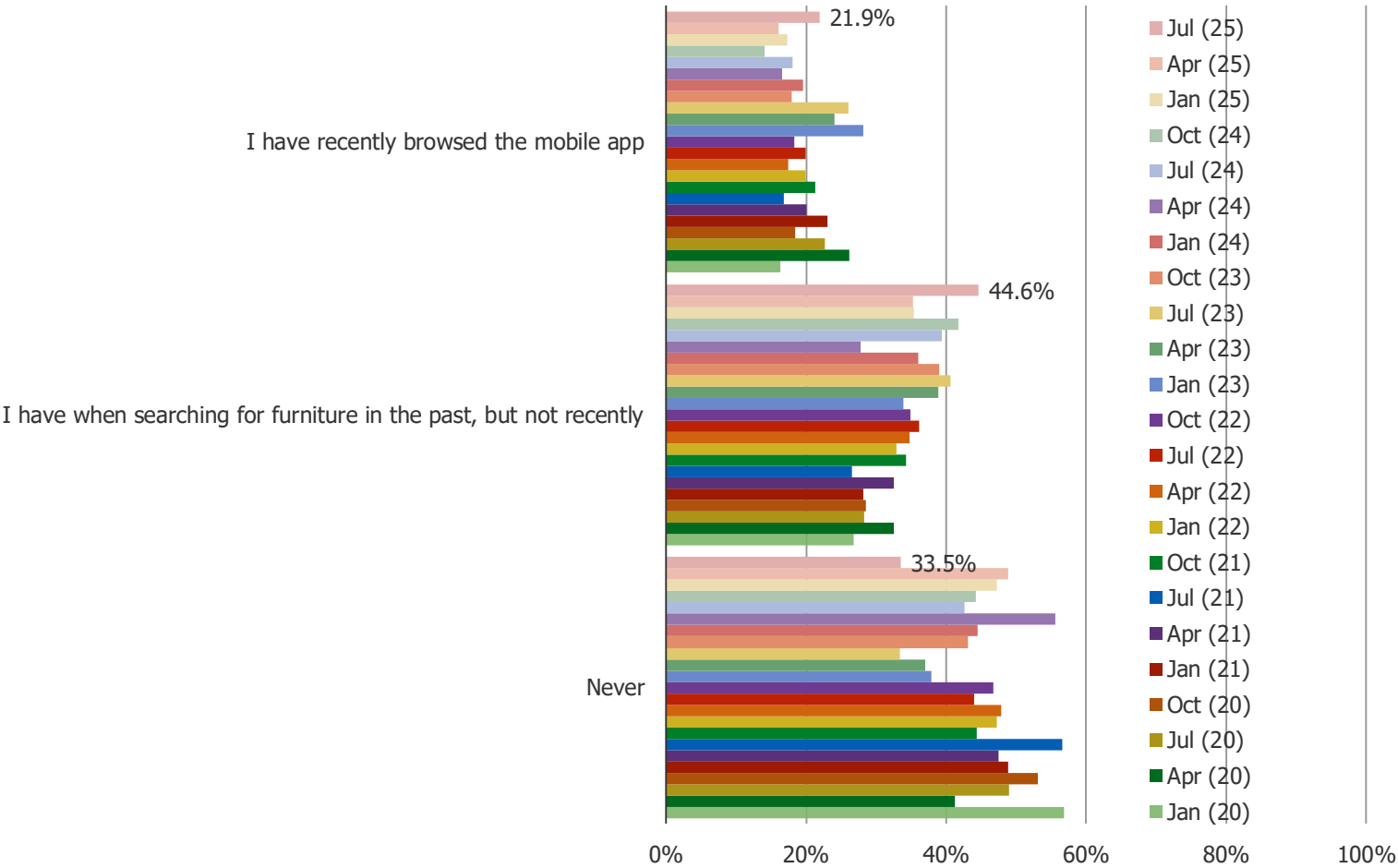
Posed to Wayfair users.

Weighted Average of responses...



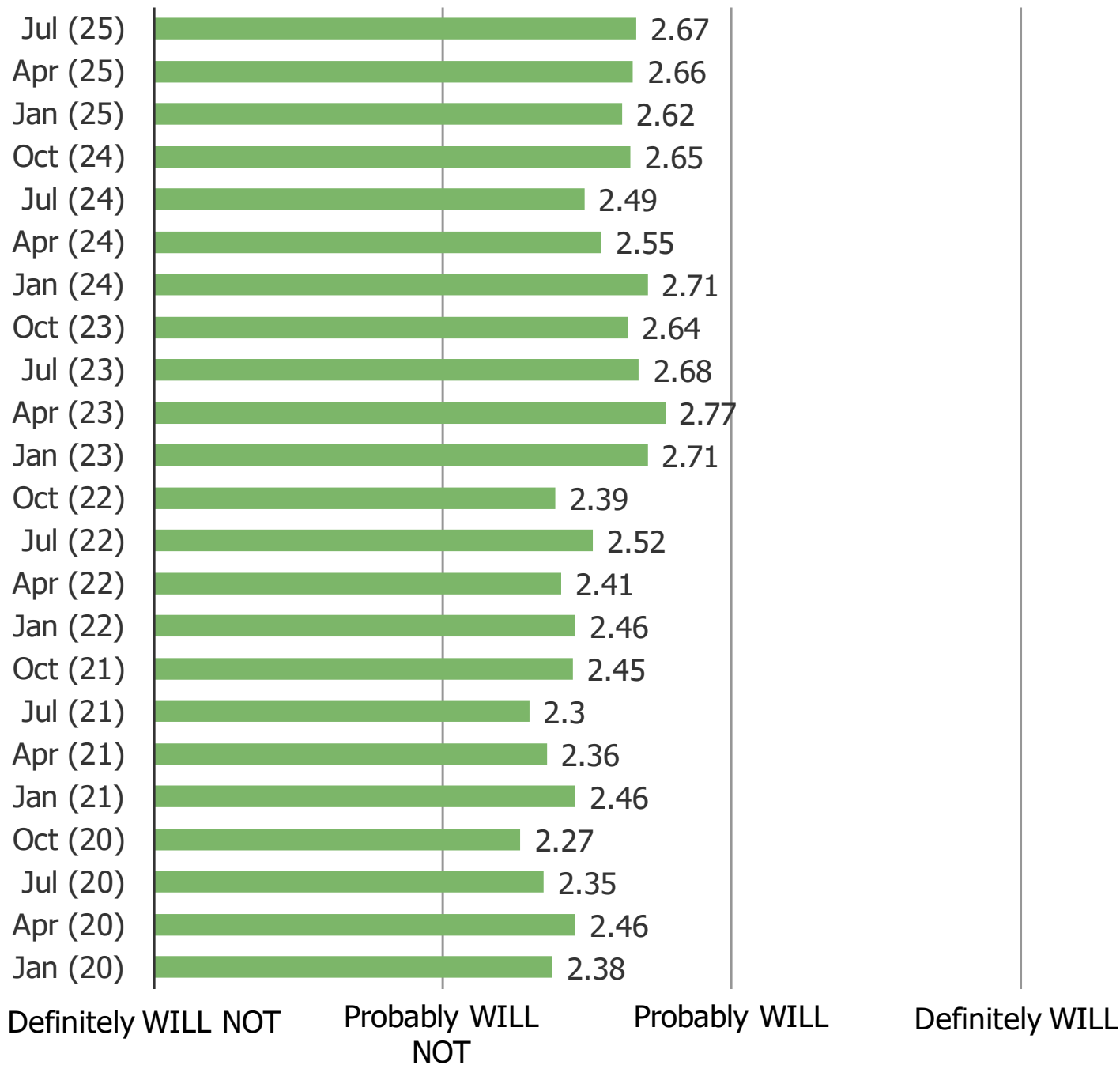
HAVE YOU EVER BROWSED THE WAYFAIR MOBILE APP FOR ITEMS?

Posed to Wayfair users.



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

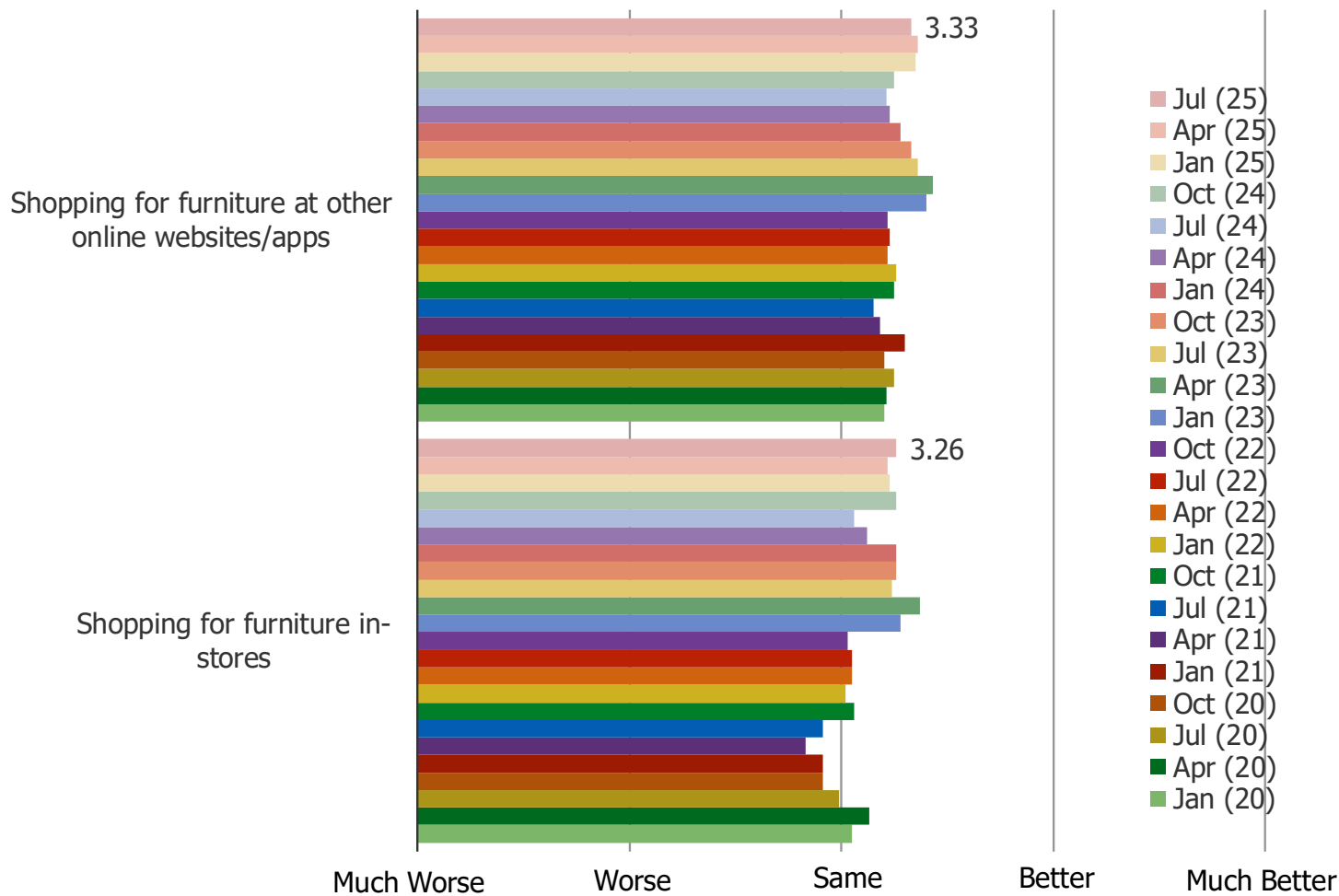
Posed to Wayfair users.





HOW DOES THE WAYFAIR SHOPPING EXPERIENCE COMPARE TO...

Posed to Wayfair users.

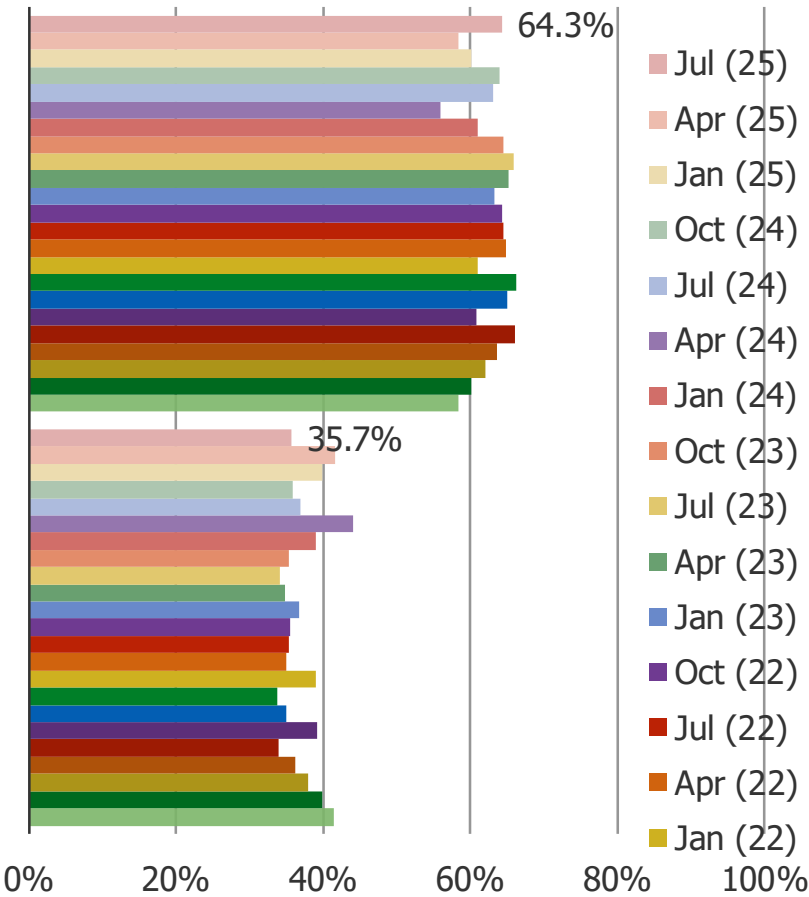


HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.

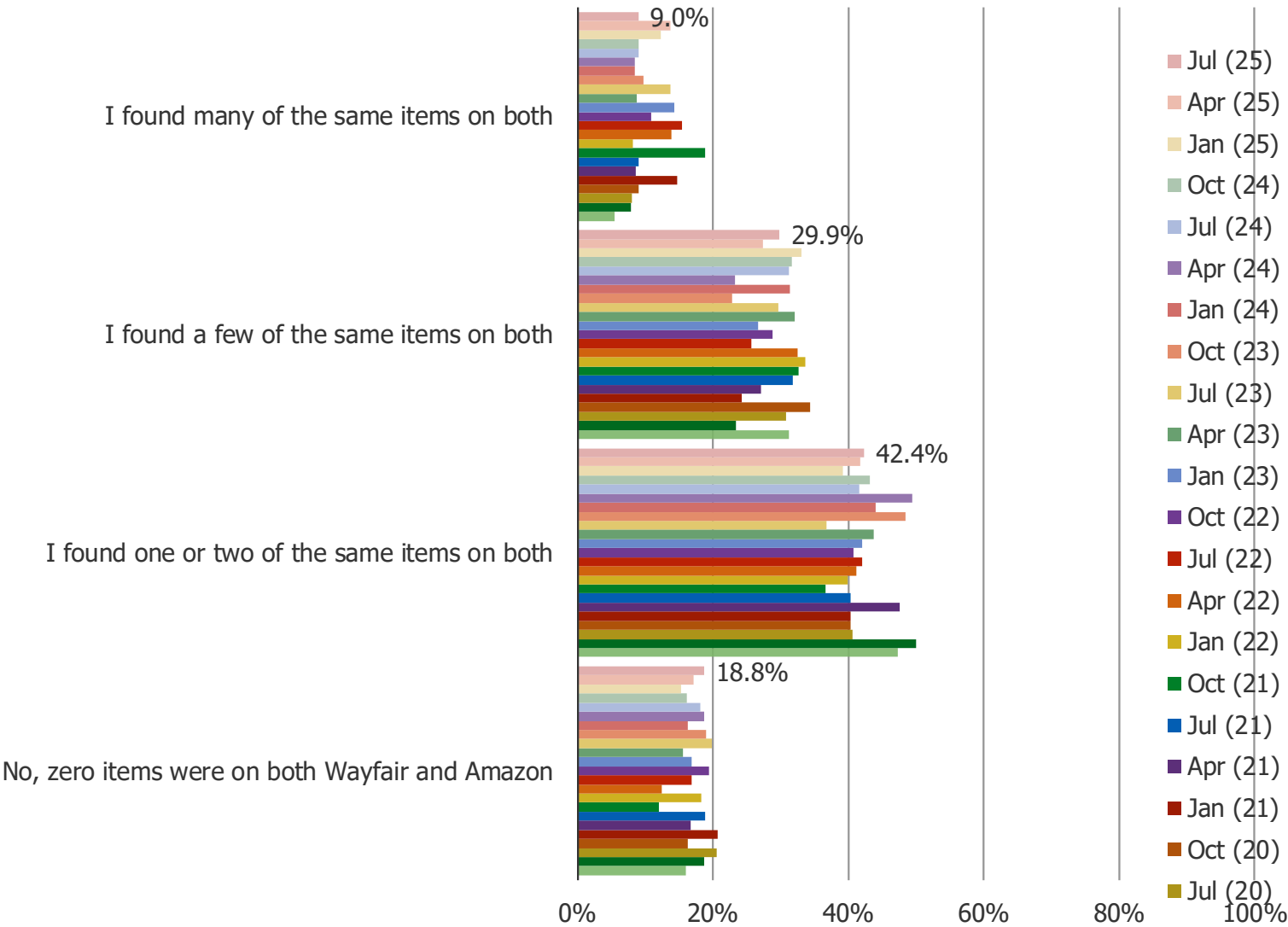
Yes, I have searched for similar furniture items on both Wayfair and Amazon

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



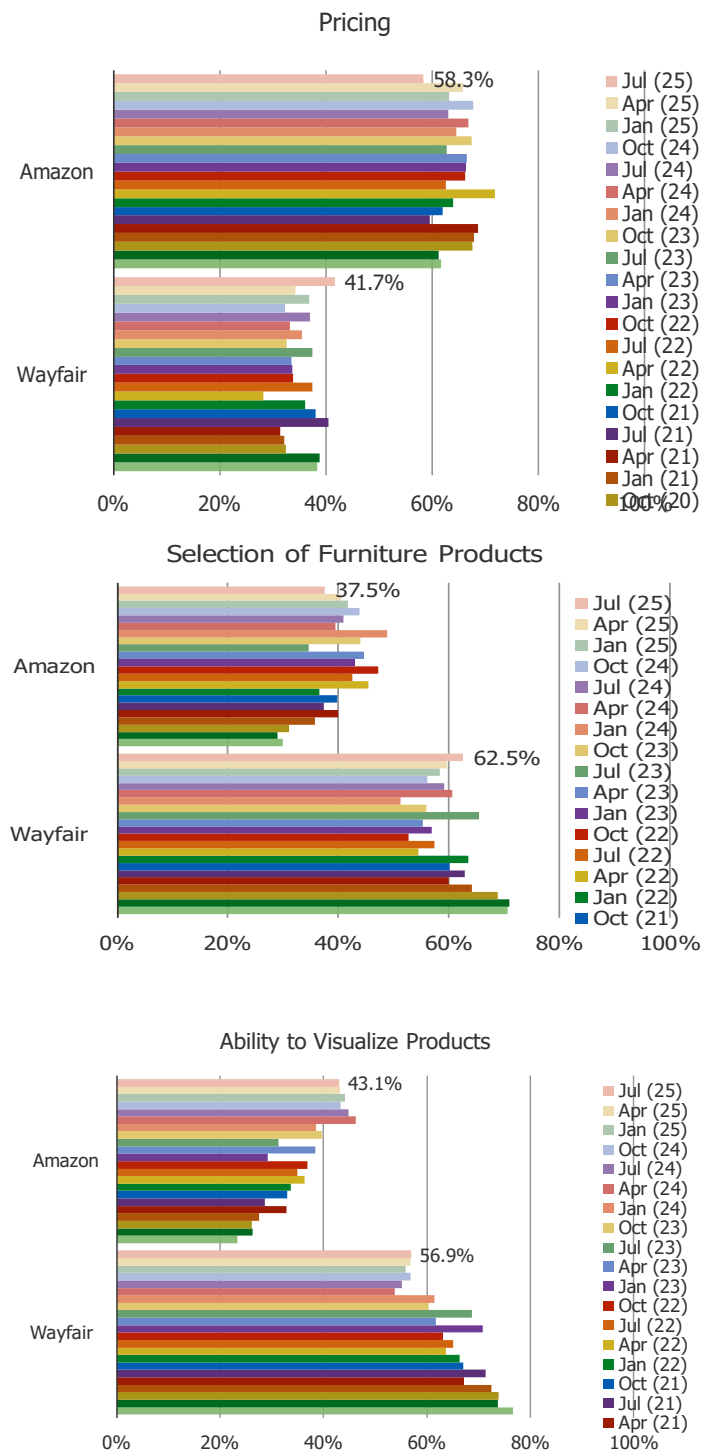
IN THE COURSE OF YOUR SEARCH, DID YOU FIND ANY ITEMS THAT WERE IDENTICAL AND LISTED ON BOTH WAYFAIR AND AMAZON?

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



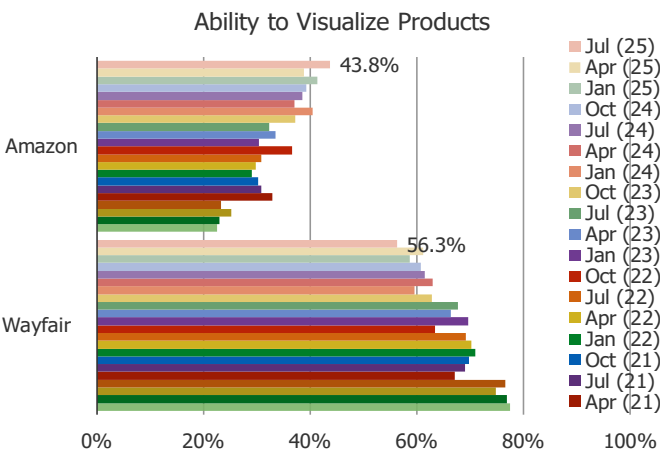
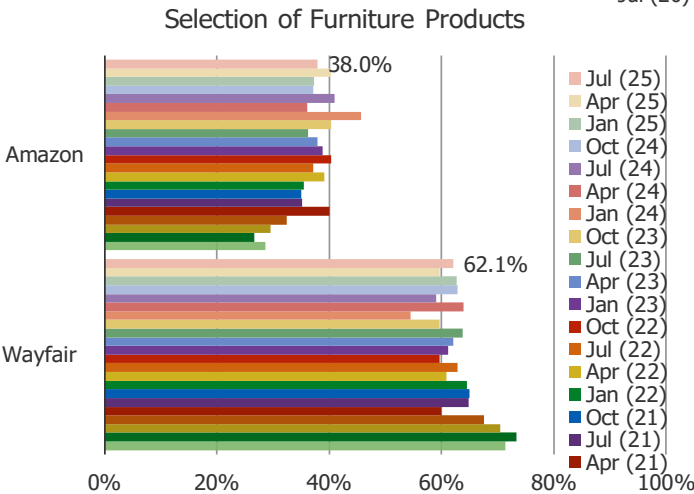
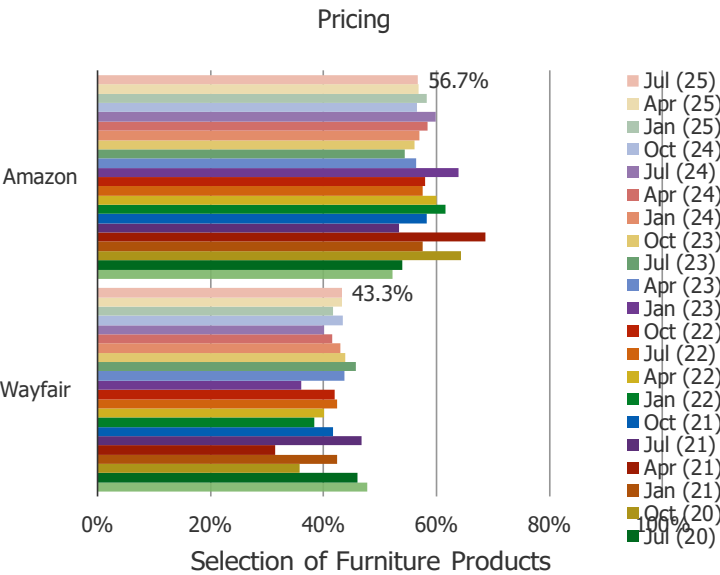
WHEN YOU WERE SHOPPING FOR THE SAME FURNITURE CATEGORY ON BOTH WAYFAIR AND AMAZON, WHICH PLATFORM HAD BETTER...

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



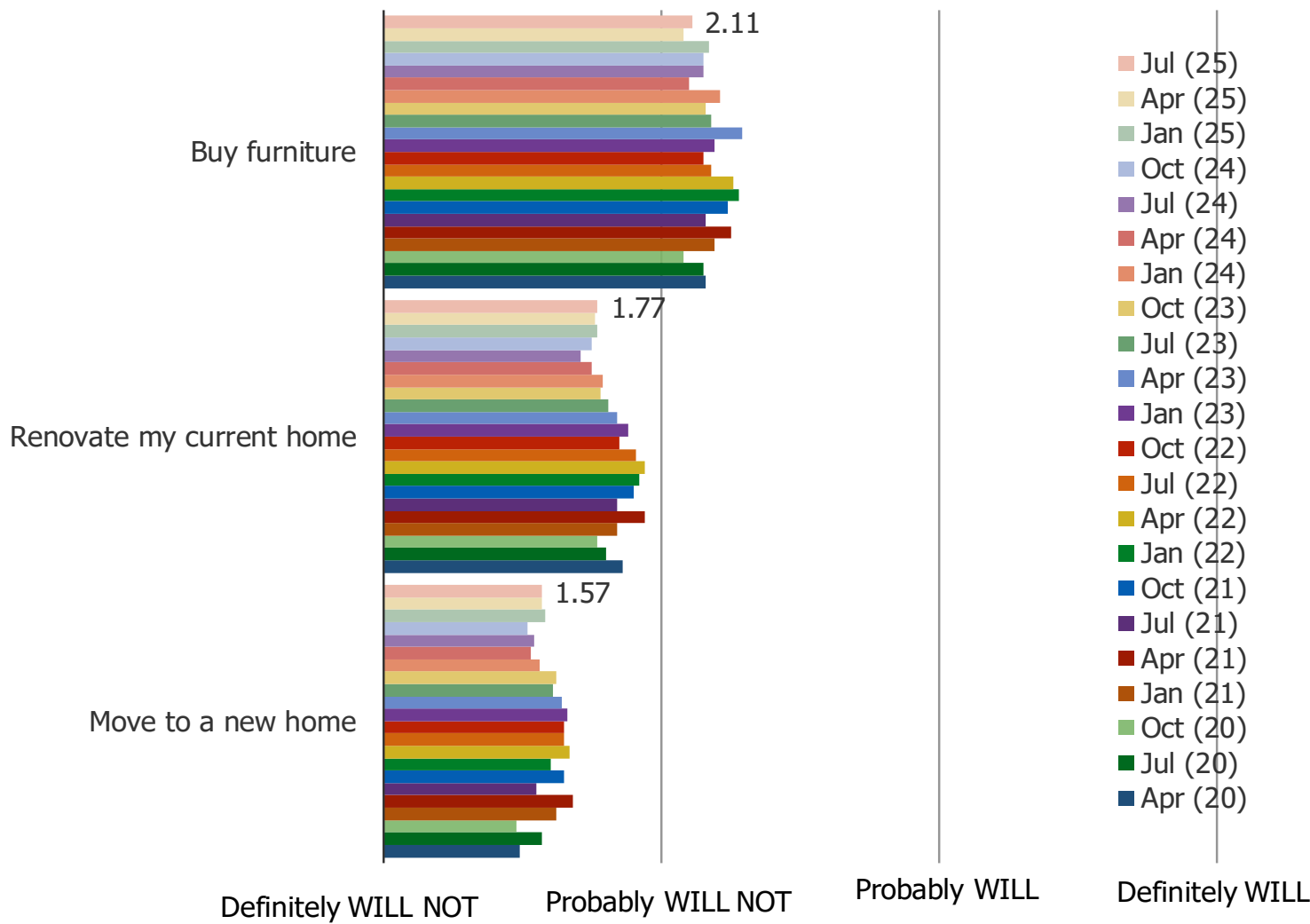
IF YOU NEEDED TO SHOP FOR A TYPE OF FURNITURE TODAY, WHICH PLATFORM DO YOU THINK WOULD HAVE BETTER...

Posed to ALL Wayfair users.



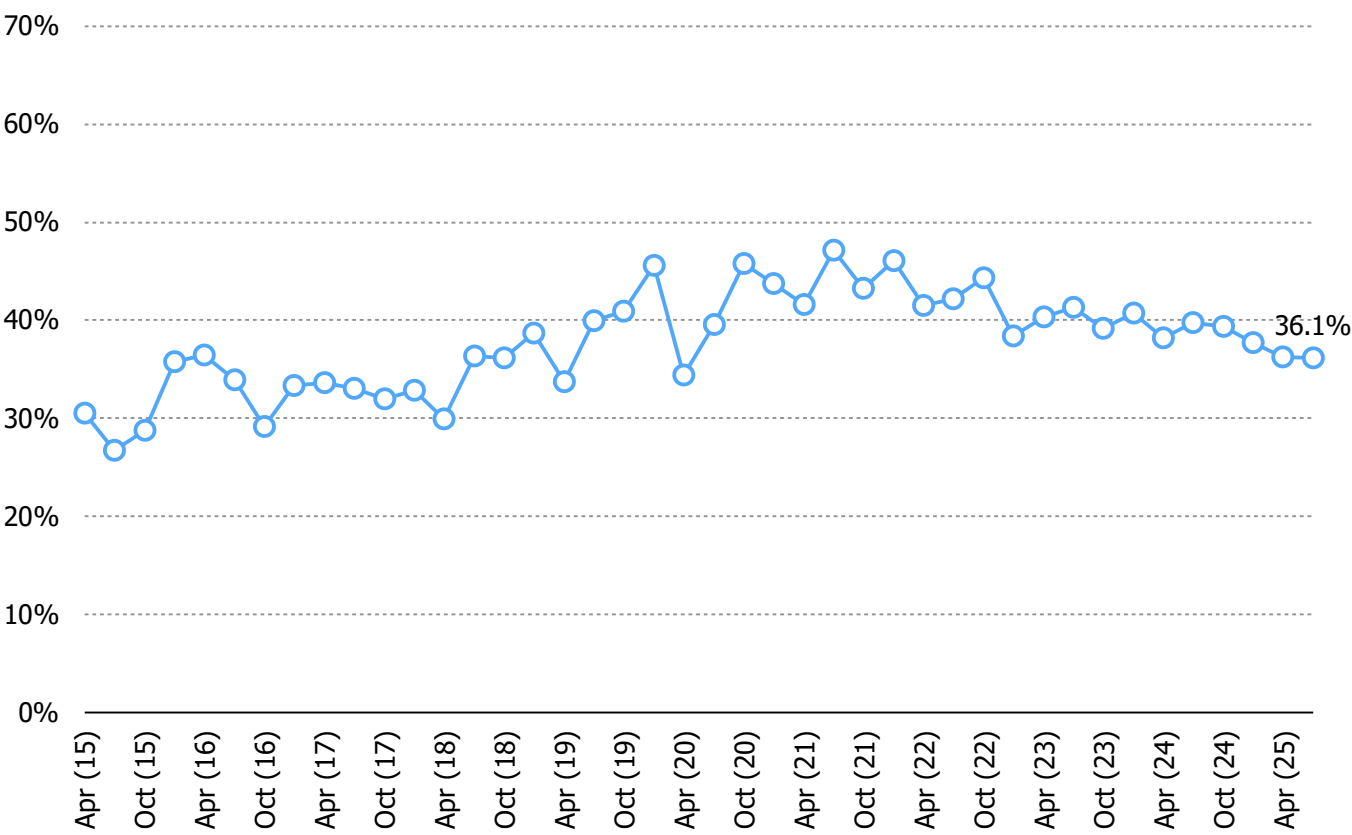
DO YOU PLAN TO DO ANY OF THE FOLLOWING IN THE NEXT FEW MONTHS?

Posed to ALL respondents.



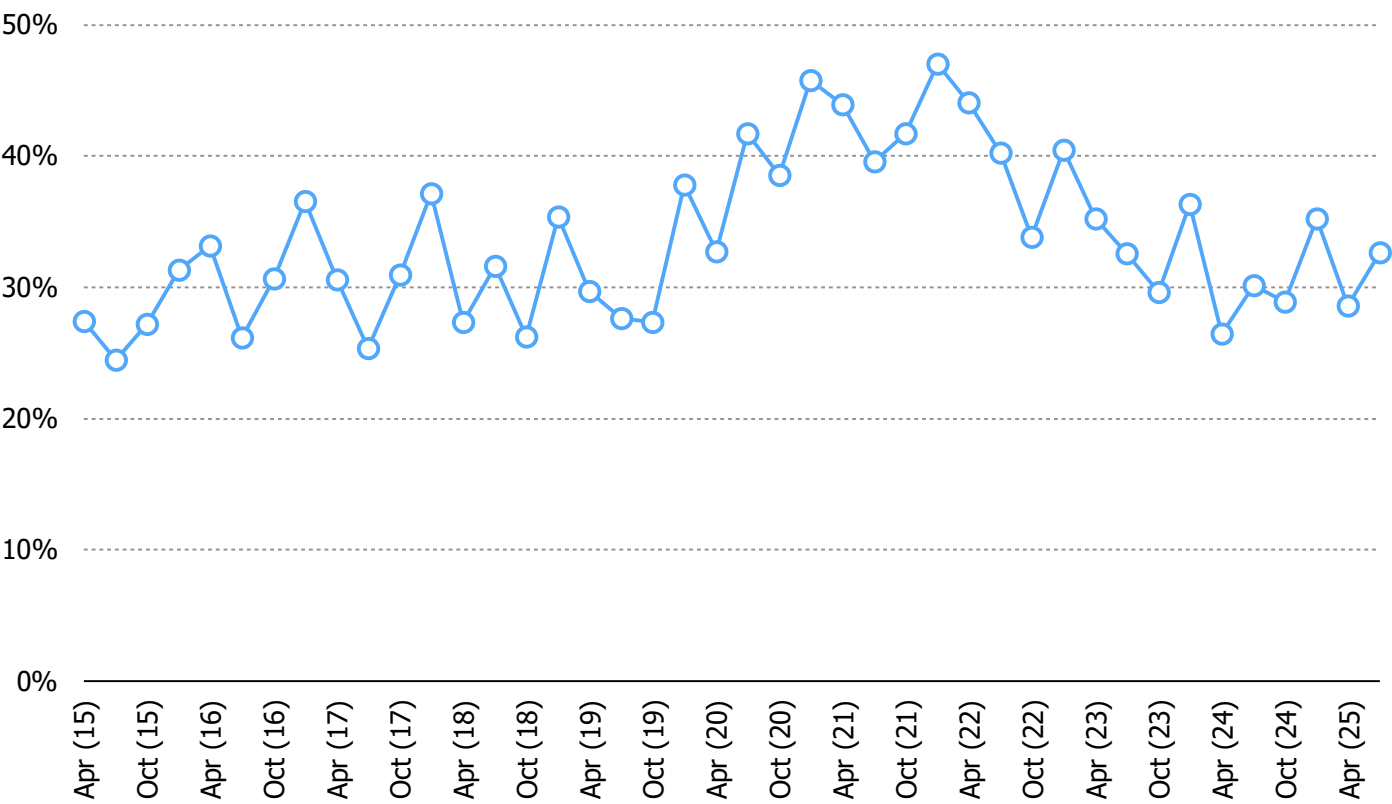
# ETSY TRENDS

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

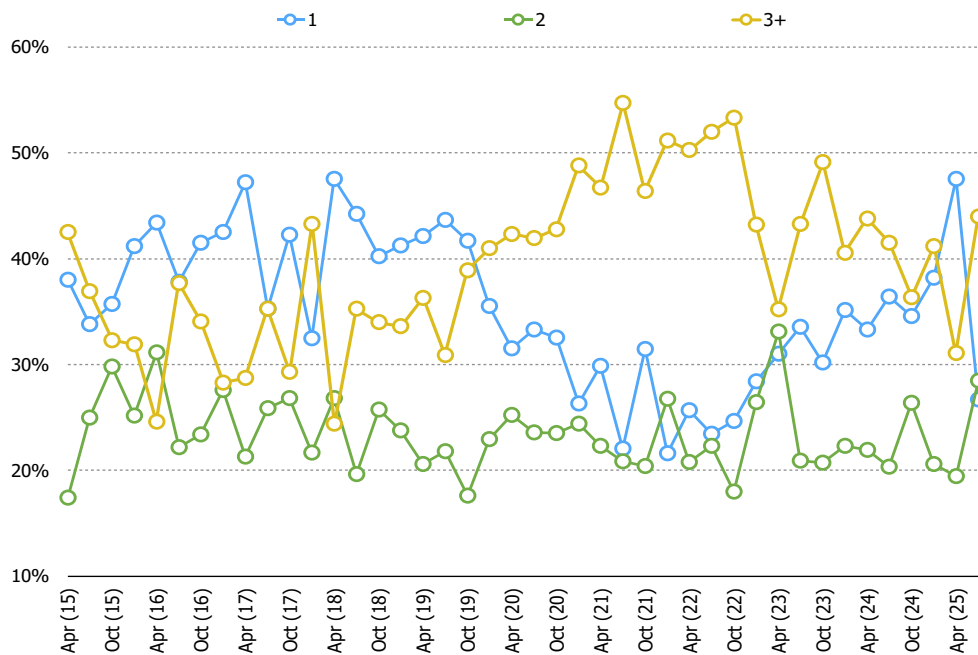




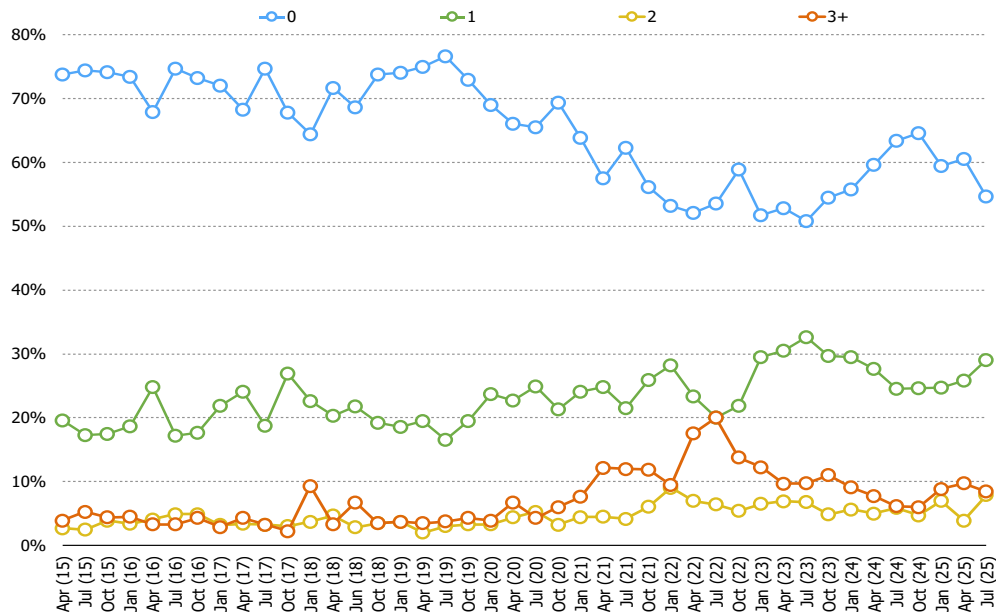
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



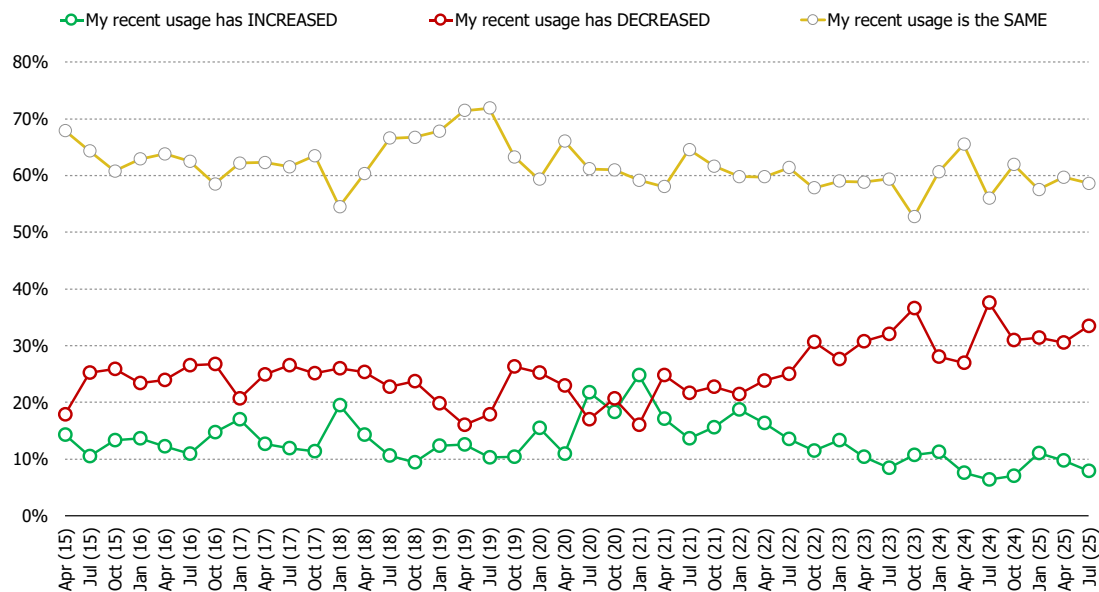
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



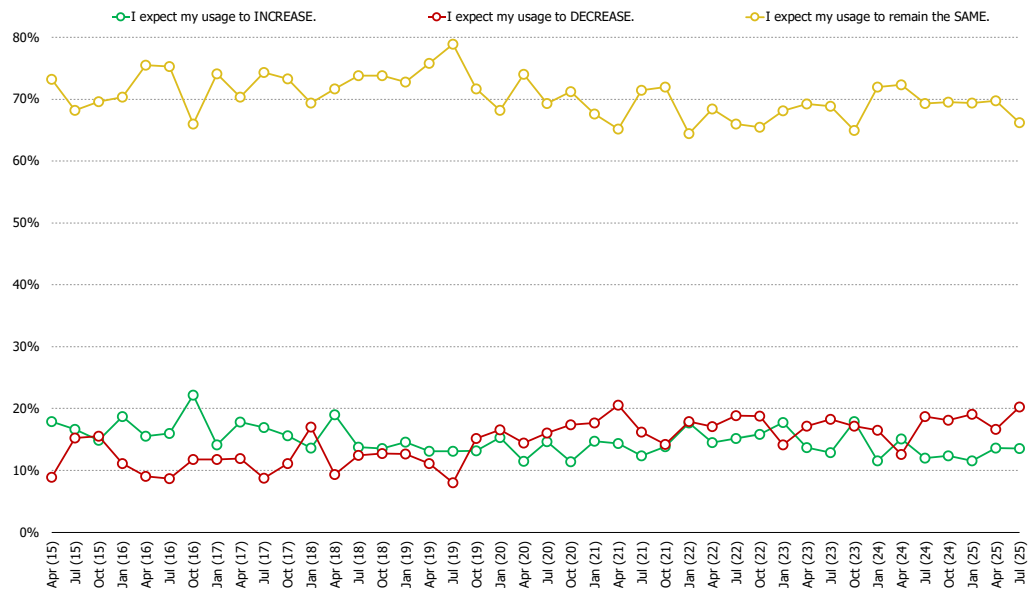
ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH



ETSY USERS – RECENT USAGE

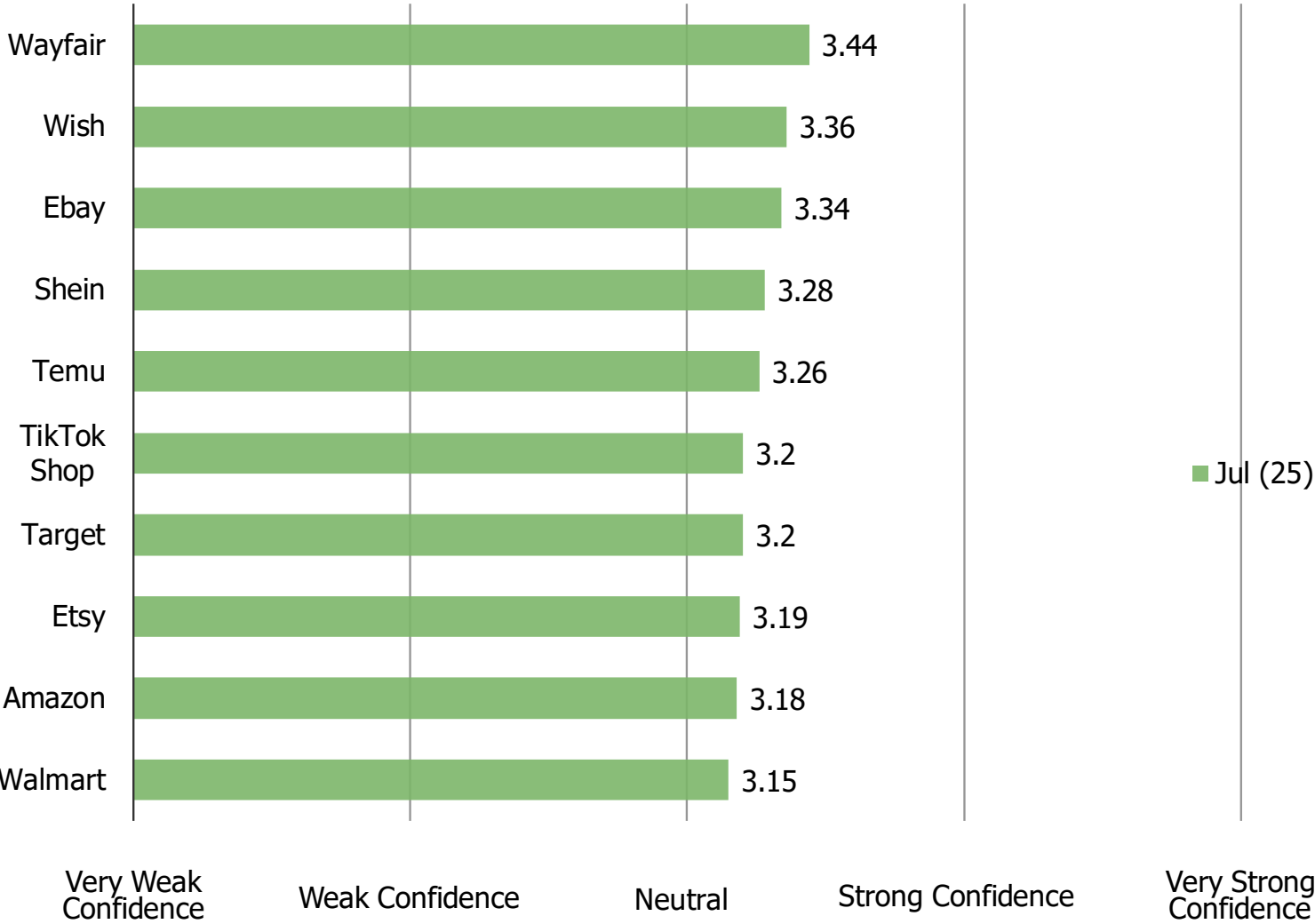


ETSY USERS – EXPECTED USAGE



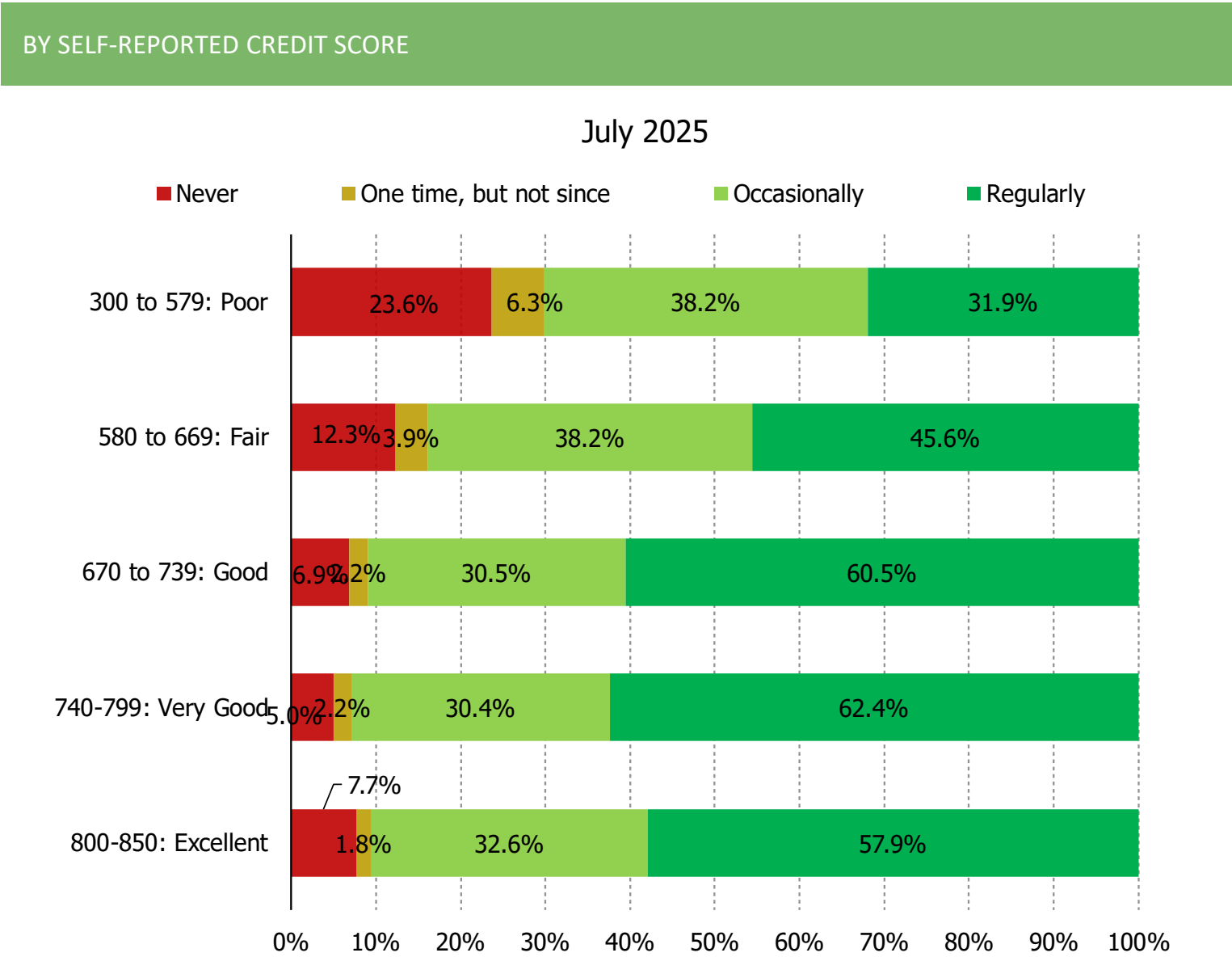
# CROSS-TAB ANALYSIS

CURRENT SPENDING CONFIDENCE OVERALL...



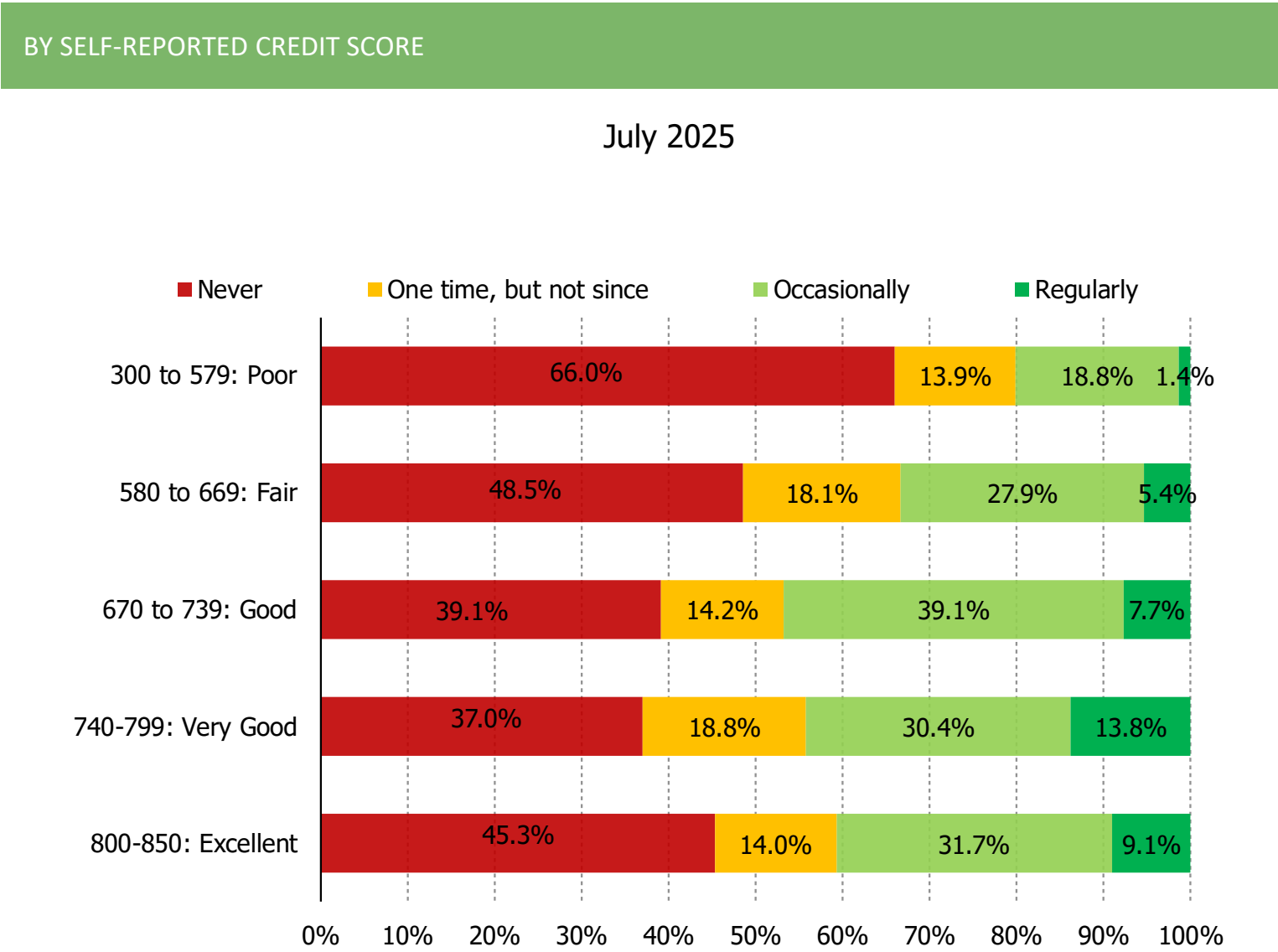
\* This chart filters respondents who occasionally or regularly shop each of the above and shows how confident these respondents currently feel overall in spending money.

Experience with Amazon – Purchased items...



\*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.

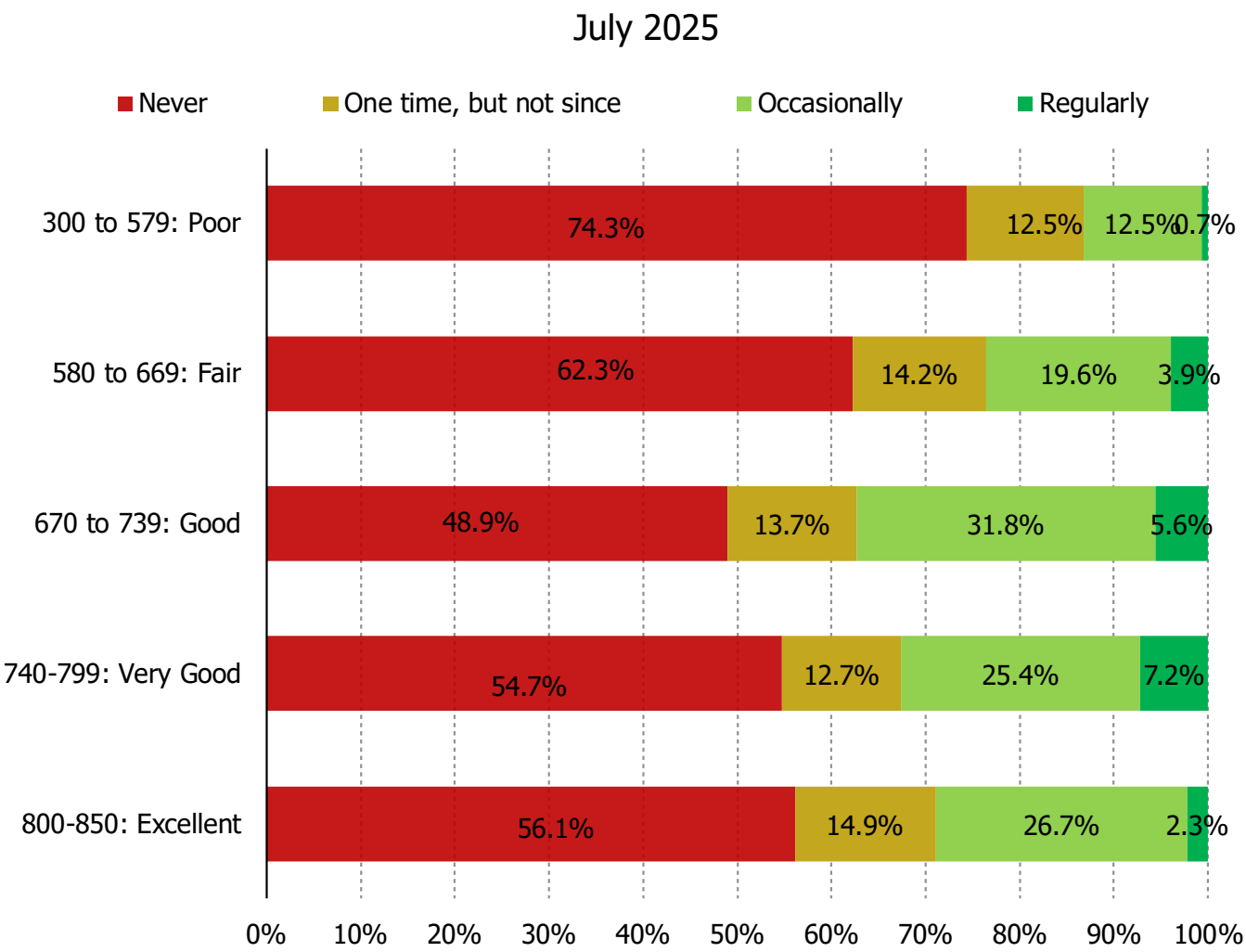
Experience with eBay – Purchased items...



\*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



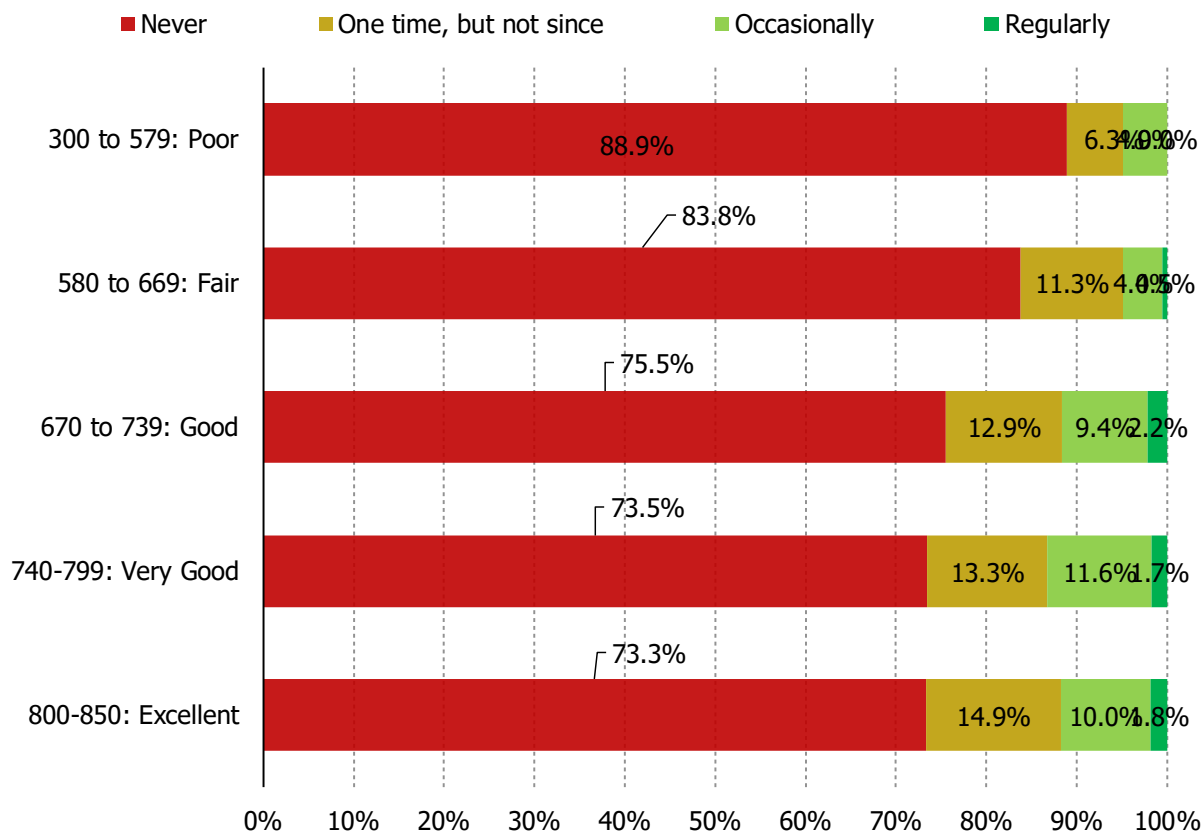
\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.



Experience with Overstock – Purchased items...

BY SELF-REPORTED CREDIT SCORE

July 2025

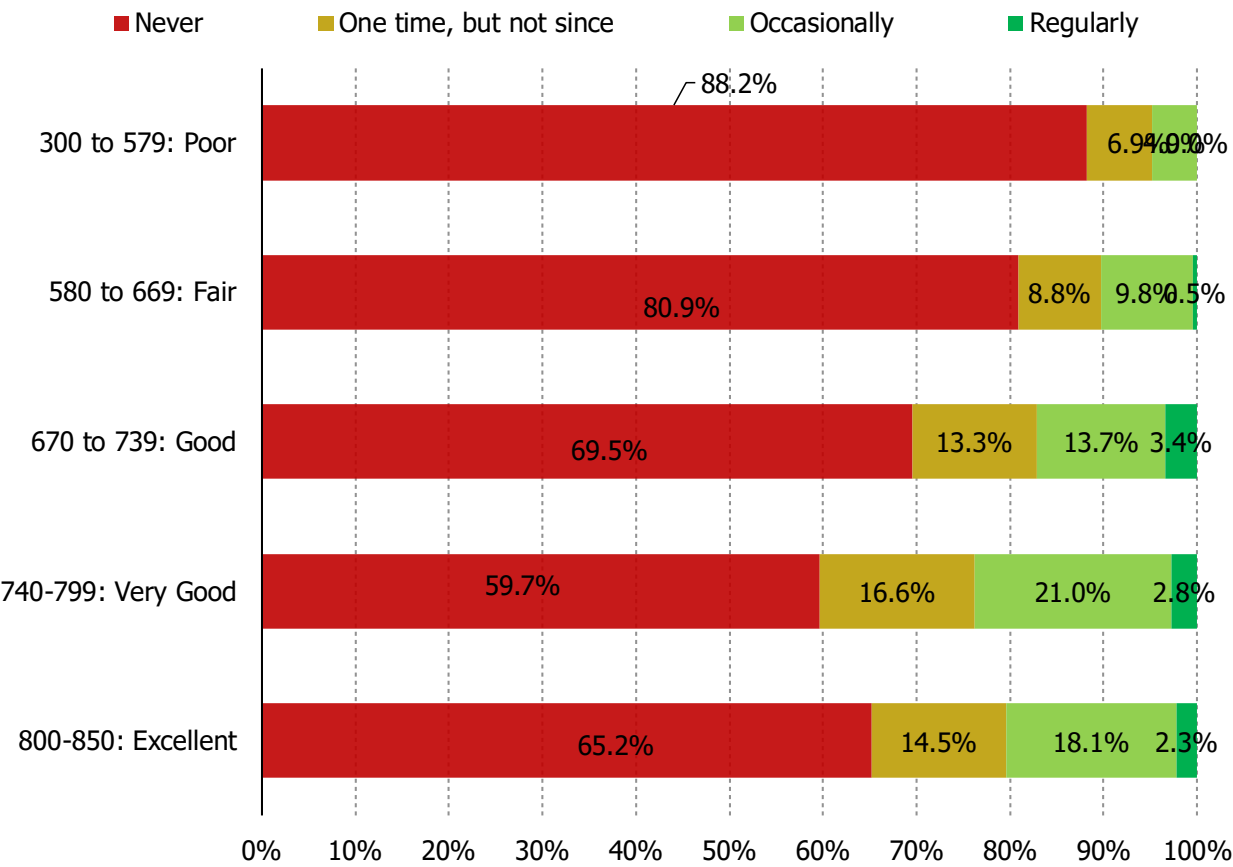


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wayfair – Purchased items...

BY SELF-REPORTED CREDIT SCORE

July 2025

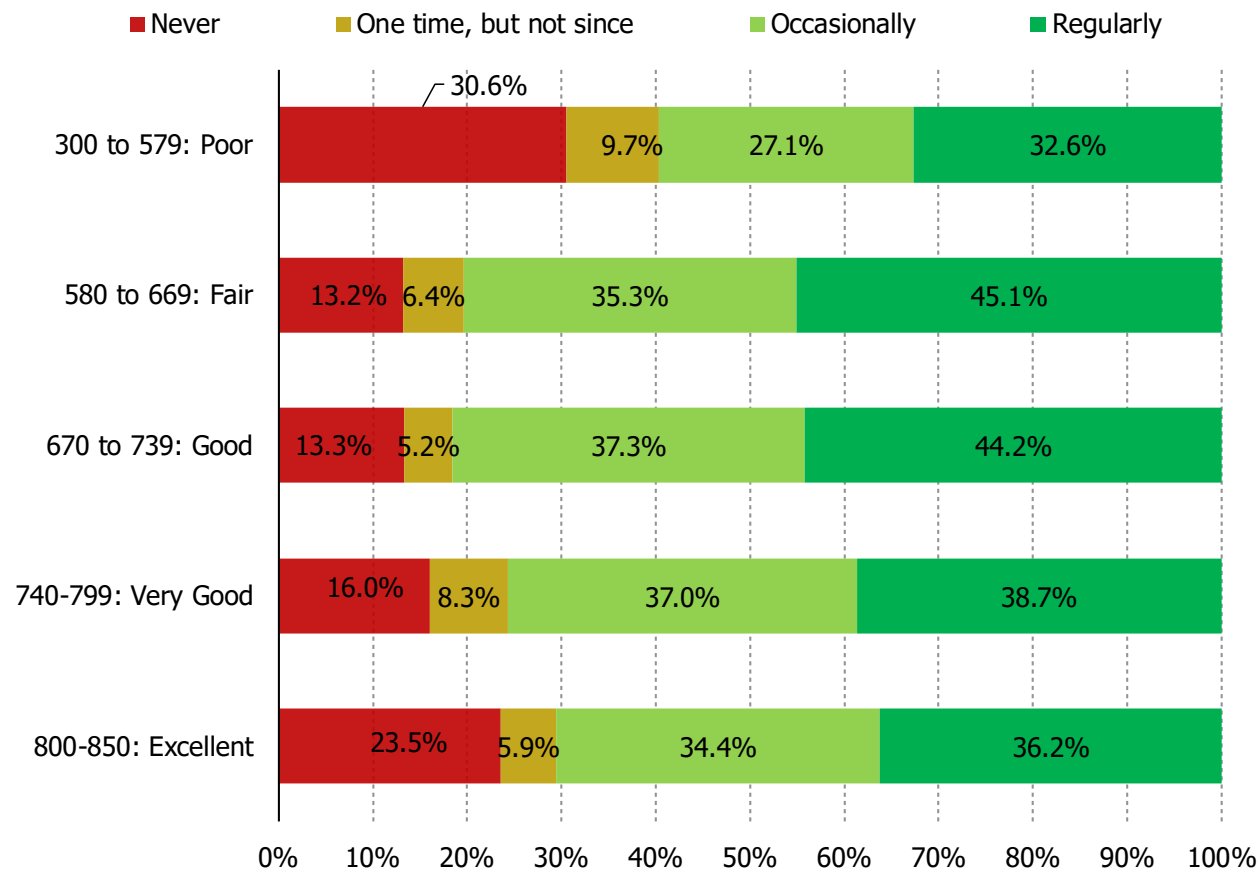


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Wal-Mart – Purchased items...

BY SELF-REPORTED CREDIT SCORE

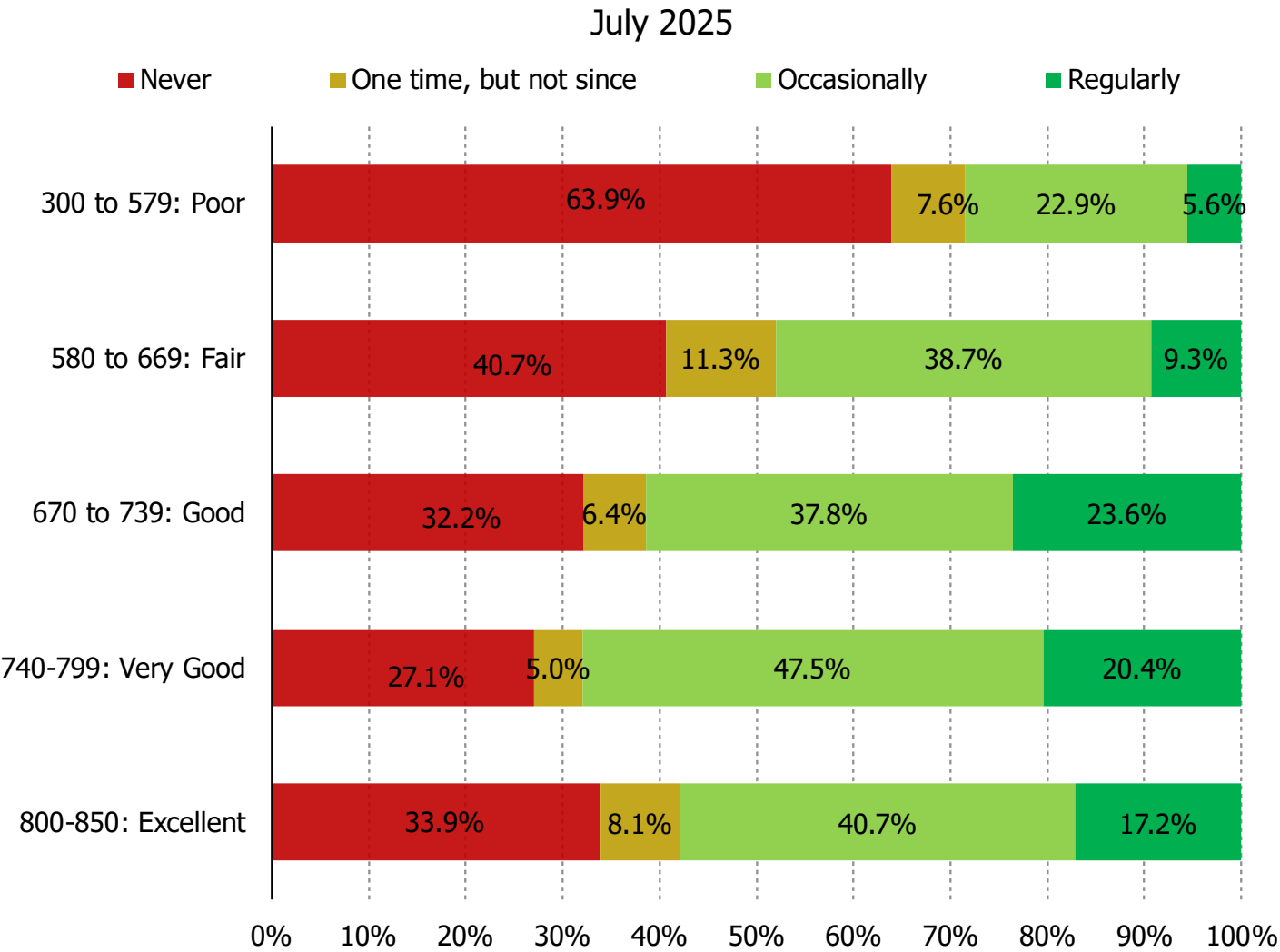
July 2025



\*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...

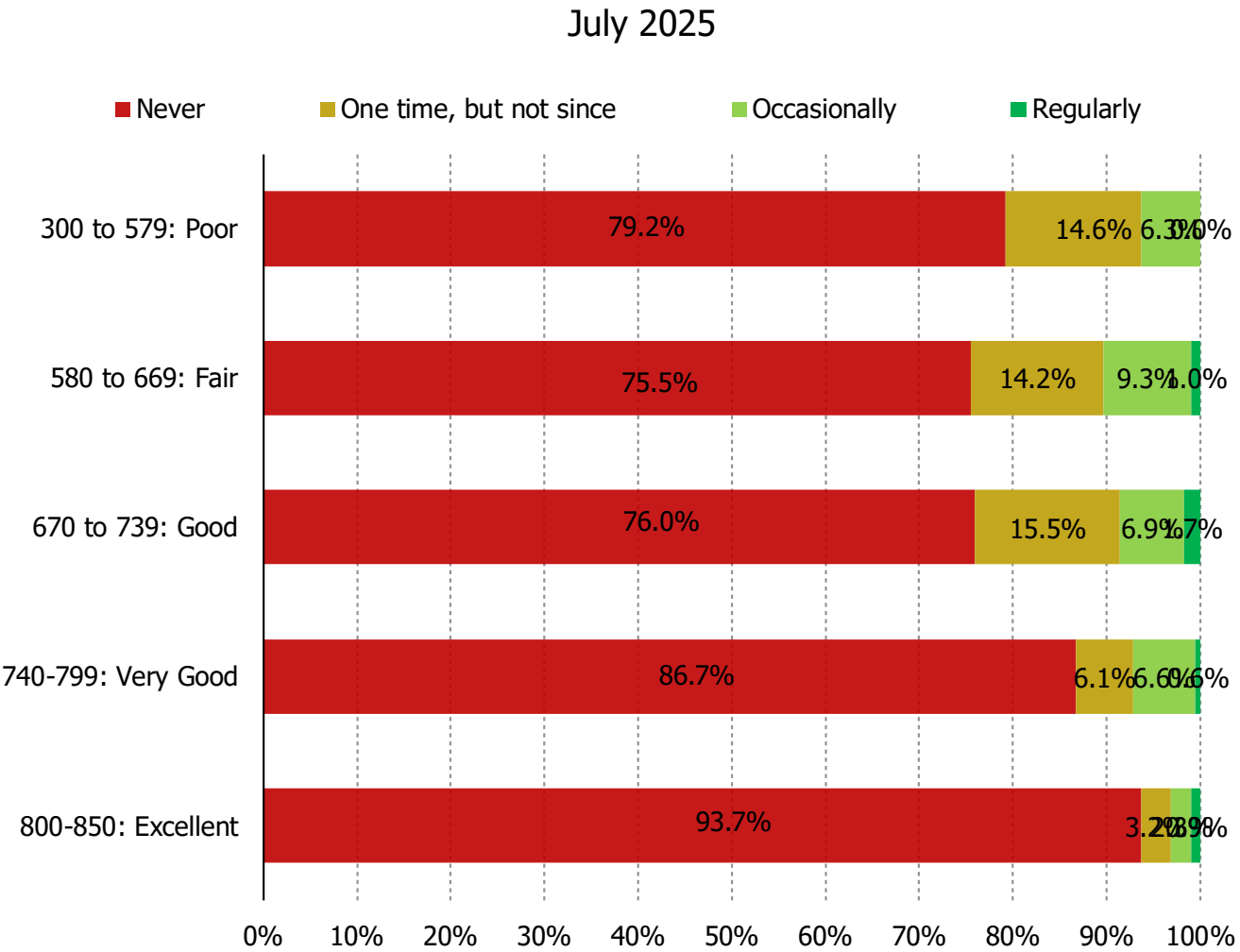
BY SELF-REPORTED CREDIT SCORE



\*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

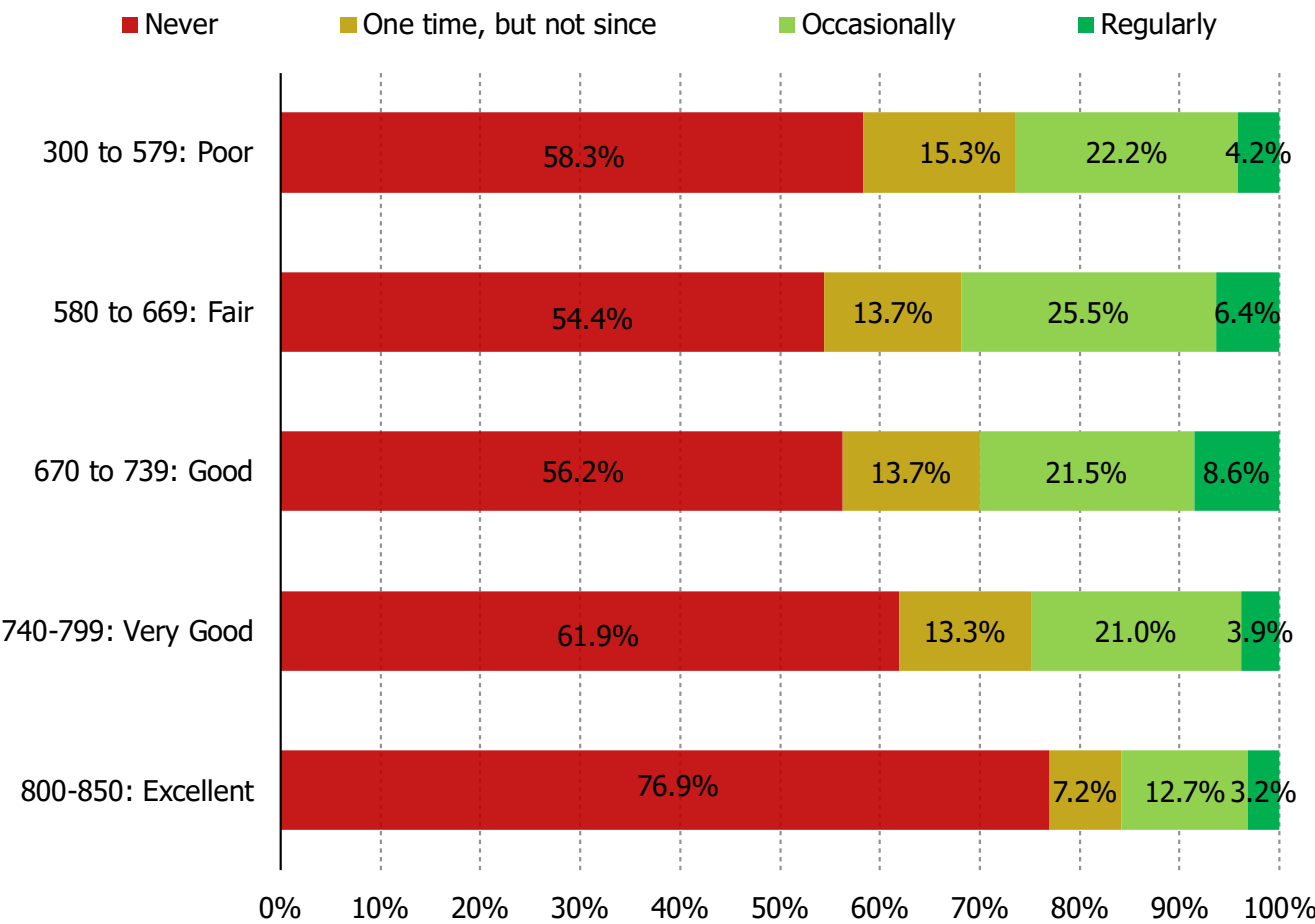


\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

Experience with Temu – Purchased items...

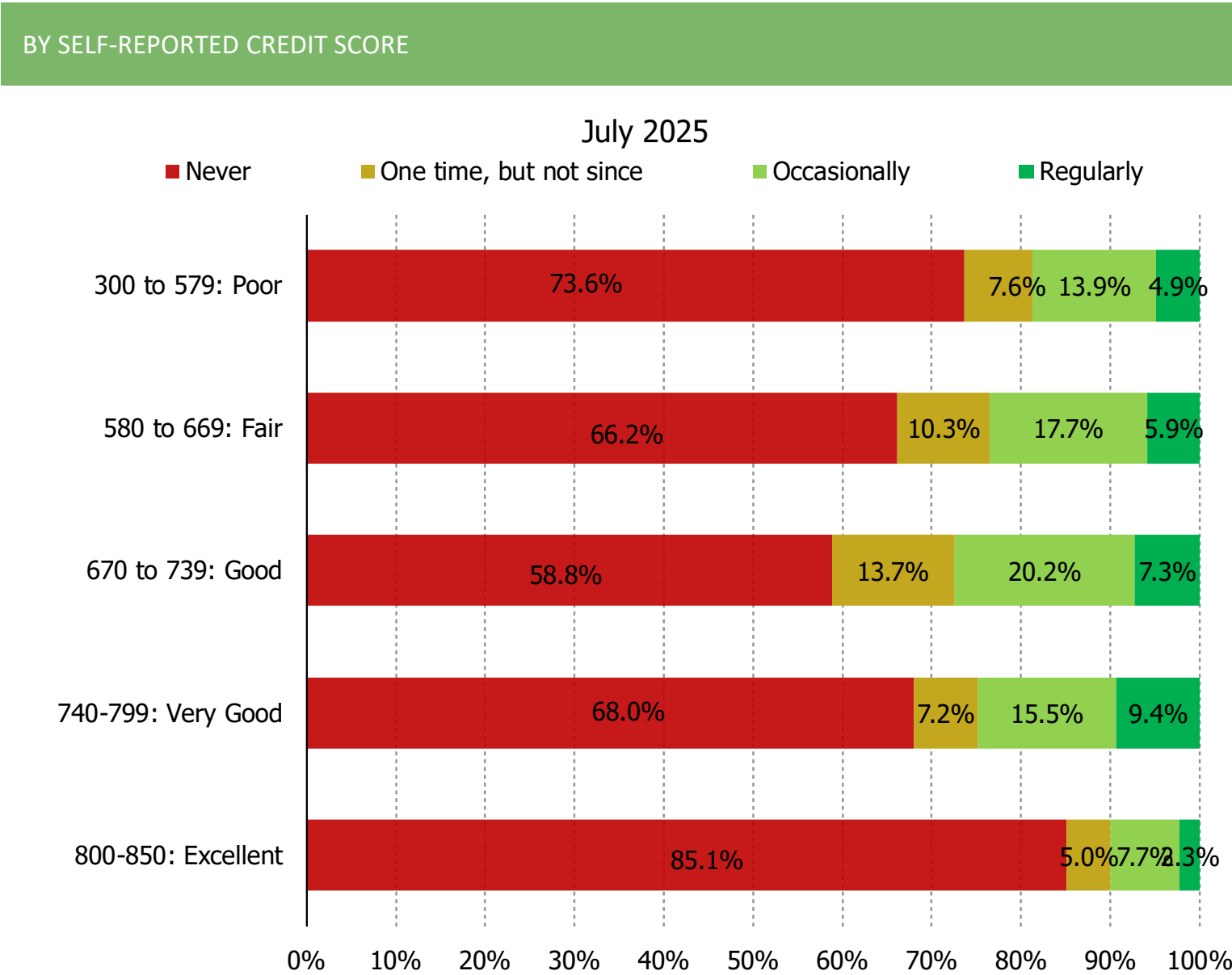
BY SELF-REPORTED CREDIT SCORE

July 2025



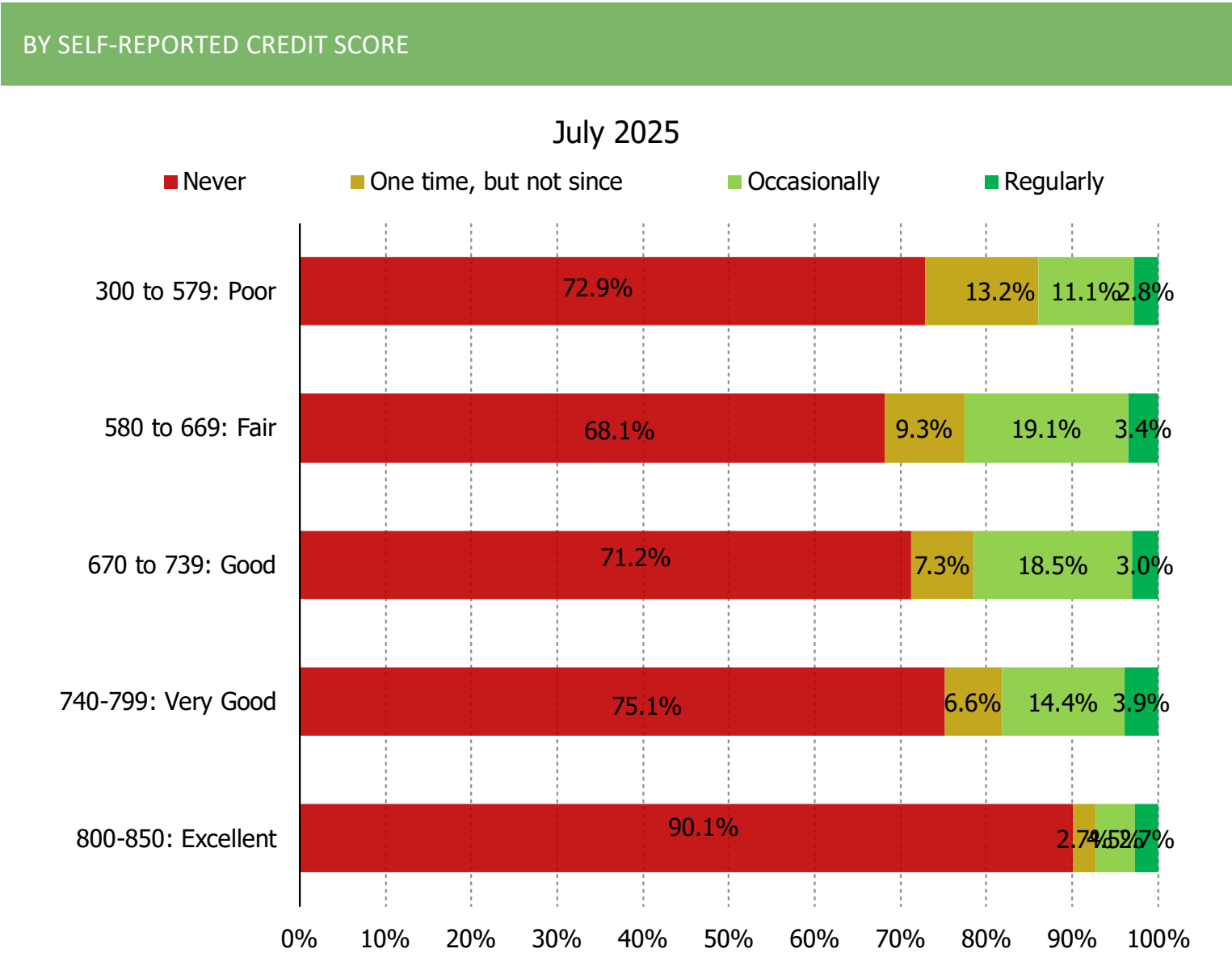
\*This chart filters respondents by their self-reported credit score and shows how likely each cohort is to be a customer of the company noted above.

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...



\*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.