Wunderkind

AUS

2025 Consumer Insights Report

FOR DIGITAL COMMERCE

Introduction

The digital commerce landscape in Australia is evolving at a rapid pace. Australian consumers now demand seamless, personalised, and value-driven online shopping experiences, with preferences heavily influenced by demographic factors like age and gender. These dynamics impact shopping habits, device usage, and purchase motivations. By leveraging data segmented by these demographic categories, businesses can adapt their strategies to address consumer needs, anticipate market trends, and gain a competitive edge in the digital marketplace.

Australia's economic forecast for 2025 reflects cautious optimism, with analysts projecting a modest 2% year-over-year growth supported by rising real household incomes as inflation subsides. The housing market is poised for recovery, and anticipated rate cuts may further stimulate economic activity. However, challenges like subdued household consumption due to tighter policies and economic uncertainties persist. Nonetheless, as real incomes rebound and monetary conditions potentially ease, spending is expected to regain momentum. For businesses, understanding these economic trends and consumer behaviours will be critical to navigating the evolving landscape effectively and thriving in the competitive Australian market.

2024 was a year of both change and continuity. In many respects, it was less tumultuous than previous years. Marketers have begun to adapt to sweeping global privacy legislation, the rapid expansion of AI tools has been broadly embraced, and third-party tracking cookies in Google remain—for now.

AI has become deeply embedded in marketing strategies, enhancing personalisation, content creation, and customer engagement. Yet, most marketers are only scratching the surface of its potential, often deploying it for basic tasks. While 2024 was a year of experimentation, 2025 must be a year of action.

For marketers heavily reliant on paid channels, 2024 was as challenging as ever, with low engagement rates and poor ROI. To counter these challenges, brands must pivot from costly, competition-dependent channels like paid search and display to owned channels. Email remains one of the most effective ways to reach consumers—uncensored, algorithm-free, and highly personalised. In 2025, more brands will also leverage the immediacy and wide reach of text to connect with their audiences.

With up to 95% of website traffic remaining anonymous, it is crucial to deploy technology that captures email addresses and phone numbers at scale.
In 2024, many brands turned to identity resolution to recognise returning customers who had cleared first-party cookies or were using new devices. These solutions also helped transform truly anonymous website visitors into highly engaged customers, though significant opportunities for improvement remain.

The digital commerce landscape in Australia continues to evolve, reshaping how Australian consumers interact with brands and make purchase decisions. Australian shoppers increasingly demand convenience, personalisation, and value in every interaction—whether shopping on a marketplace, a direct-to-brand platform, or through omnichannel experiences. These expectations reflect generational shifts, advances in technology, and a growing emphasis on authenticity and transparency from brands.

This underscores the importance of data-driven planning and consumer-centric strategies. In this Australia-focused edition of the 2025 Consumer Insights Report, we delve into the preferences, expectations, and behaviours of Australian shoppers to equip marketers with actionable insights. The voice of the consumer remains a vital guide for navigating this complex environment. Ignoring consumer sentiment risks alienating audiences and hindering growth.

At Wunderkind, we combine deep industry expertise with an AI-driven performance marketing solution that collects consent-based, first-party data and identifies anonymous traffic. This allows brands to scale hyper-personalised, one-to-one messages that drive unparalleled revenue. If you're ready to unlock a top-performing revenue channel, we're here to help.

TL;DR: 10 Quick Insights from Our Data

1. Mobile Dominance in Online Shopping
Smartphones are the go-to device for online purchases, with usage rates at 99% for Gen X, 97% for Millennials, 94% for Gen Z, and 95% overall. However, desktops still play a significant role, especially for Boomers (79%) and male shoppers (76%). This underscores the need for mobile-first strategies while maintaining desktop optimisation.

2. Younger Shoppers Drive Frequency
Gen Z and Millennials dominate shopping frequency, with 51% and 41% respectively shopping online 2–3 times a week compared to 28% for Boomers. Leveraging loyalty programmes and engagement campaigns can help sustain these habits.

3. Self-Purchases Lead the Way
Most shoppers buy primarily for themselves, a trend consistent across all age groups, particularly for men (75%) and Boomers (82%). In contrast, Gen Z and women are more likely to shop for family or partners, suggesting an opportunity for tailored messaging.

4. Value and Personalisation Drive Direct-to-Brand Shopping
Over half of Australians favour direct shopping for better pricing (54%), particularly among older generations. Loyalty rewards are a secondary driver, especially for Gen Z (30%) and women (20%).

5. Shipping Costs are the Biggest Deterrent
Shipping fees are the leading cause of cart abandonment, especially for Gen X and Millennials (60% and 44% respectively) and almost half of women (48%). Solutions like free shipping thresholds or bundling discounts can help counteract this.

6. Content Tailored by Demographics Engages More
Promotions resonate strongly with Boomers (76%), while Gen Z and Millennials respond to loyalty-focused campaigns (51% and 46%).

7. Email Remains the Preeminent Channel for Messaging
Email is the top channel for older shoppers, favoured by over two-thirds (67%) of Boomers and half (50%) of women. Meanwhile, there is growing interest in social media among younger audiences, and consistent buy-in for text across generations.

8. AI Personalisation: A Key Growth Opportunity
AI-driven personalisation excites Gen Z (38%) and Millennials (42%), though Boomers remain cautious (21%). Transparent communication around data use can help build trust across demographics.

9. Direct Channels Are Growing
Online retail stores (33%) and marketplaces (32%) are trusted most, but direct-to-brand websites are just behind (28%), and attract Gen X (31%) and Millennials (30%) for exclusivity.

10. Urgency, Discounts and Rewards Drive Purchases
Price-drop alerts (60%), discount codes (52%) and loyalty program offers (33%) are the most effective motivators, among all consumers.

Methodology

In partnership with MX8 Labs, Wunderkind conducted the 2025 Consumer Insights Report, focusing on consumers in Australia. This report delves into the latest trends shaping online purchasing behaviour across the Australia.

This year's research explores consumers in Australia's shopping plans for 2025, key drivers influencing purchase decisions, and preferred channels for receiving offers and messaging. It also examines motivations for opting into brand communications, attitudes towards AI, and the value exchanges that encourage repeat purchases. The report offers detailed insights paired with strategic takeaways designed to empower digital strategists, marketers, and decision-makers. It equips them to identify emerging consumer trends and develop performance marketing strategies that strengthen brand-consumer relationships.

While this report centres on consumers in Australia, additional insights into U.S., UK, or industry-specific trends are available in our content hub.

Wunderkind

X

MX8 LABS

500

Insights are drawn from a representative sample of 500 consumers in Australia, reflecting diversity across gender, ethnicity, age, and household income. *Data collection was completed in December 2024.*

WHICH OF THE FOLLOWING DEVICES DO YOU OWN AND USE REGULARLY?

Devices Shoppers Rely on Most for Online Purchases

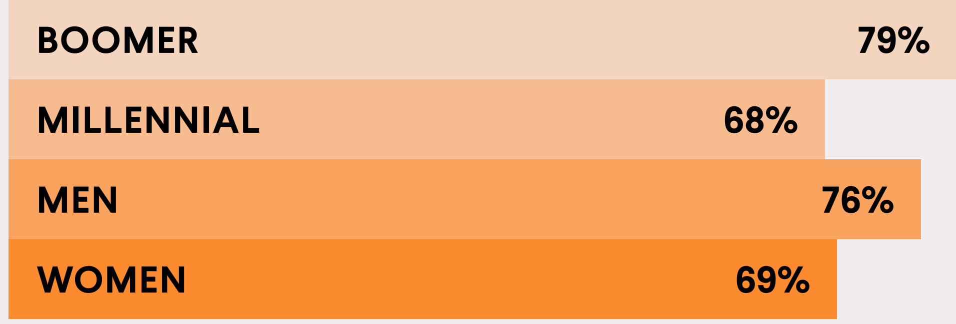
The devices Australians use for online shopping illustrate a dynamic balance between convenience and user preference. Smartphones, while dominant across all demographics, are especially favored by younger shoppers and women. Meanwhile, desktops continue to play a vital role, particularly among older generations who appreciate larger screens for detailed research and comparisons. These trends highlight the evolving interplay between technology and consumer habits, emphasising the need for businesses to ensure seamless experiences across all devices.

Key Insights

Mobile First

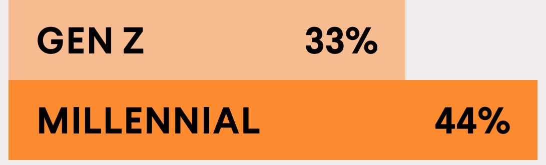
The overwhelming majority of Australian consumers rely on their smartphones for online purchasing, with usage peaking at 99% among Gen X and an almost even split across genders at, underscoring the critical importance of mobile optimisation.

Desktop Strength



Desktops remain highly relevant, particularly among older consumers, with 79% of Boomers using them compared to 68% of Millennials, highlighting their importance for detailed research and browsing. Usage is noticeably higher among men (76%) than women (69%).

Don’t Forget About Tablets



41%

41% of consumers use tablets for online shopping, with adoption ranging from a third (33%) of Gen Z to 44% of Millennials, suggesting they are viewed as supplementary tools.

WHICH OF THE FOLLOWING DEVICES DO YOU OWN AND USE REGULARLY?

Strategic Takeaways

1. Optimise for Mobile
Design fast-loading, mobile-friendly platforms with intuitive navigation and streamlined checkout experiences. Tailor these experiences to engage mobile-first audiences who prioritise convenience and immediacy.

2. Elevate Desktop Engagement
Enhance desktop shopping experiences by incorporating features like side-by-side product comparisons, detailed visuals, and robust filtering options. These elements resonate strongly with older demographics, such as Boomers, who value in-depth research and clarity in their browsing.

3. Deliver Seamless Cross-Device Messaging
Leverage identity resolution to recognise shoppers across devices and sessions. Implement a unified cross-channel messaging strategy that provides personalised, consistent communication, ensuring every interaction builds trust and strengthens customer relationships.

WHICH OF THE FOLLOWING DEVICES DO YOU OWN AND USE REGULARLY?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
A smartphone	88%	99%	97%	94%	95%	94%	95%
A personal desktop computer/laptop	79%	69%	68%	74%	69%	76%	72%
A tablet	38%	43%	44%	33%	38%	44%	41%

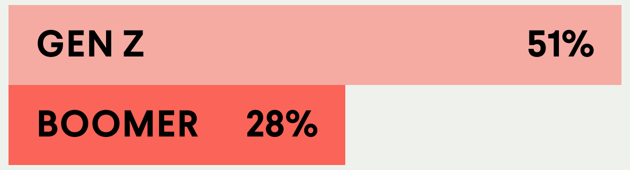
HOW OFTEN DO YOU SHOP ONLINE?

How Often Consumers in Australia Shop Online

Shopping frequency underscores how deeply online shopping is embedded in Australian consumers' lives, with notable differences across age and gender. Younger Australians, particularly Gen Z, are leading the way in frequent online purchases, highlighting their ease with digital platforms and preference for convenience. Meanwhile, gender-specific trends reveal opportunities for targeted marketing strategies.

Key Insights

High Frequency Among Gen Z Shoppers



Over half of Gen Z consumers (51%) shop online 2–3 times a week, far exceeding the frequency of Boomers, who stand at just 28%. Their preference for convenience, coupled with high multi-device ownership, calls for mobile-optimised and seamless omnichannel experiences.

Boomers Prioritise Reliability over Frequency

While Boomers shop less often, their habits emphasise a focus on quality and trusted platforms. Campaigns that emphasise value, trust, and product quality guarantees can resonate effectively with this audience.

Gender Patterns in Online Shopping

Men (39%) are slightly more likely than women (36%) to shop online 2–3 times weekly, suggesting opportunities to tailor campaigns to male shopping behaviours.

Strategic Takeaways

1. Engage Frequent Shoppers

Implement loyalty programs or subscription services to capitalise on the high shopping frequency of younger audiences. Incentives such as exclusive discounts, early access to new products, or gamified loyalty tiers can deepen engagement and reinforce habitual shopping behaviours.

2. Target Occasional Shoppers

For Boomers, highlight convenience-focused offerings that simplify decision-making and align with their preference for deliberate, planned purchases.

3. Behavioural Messaging for Action

Leverage triggered emails and text campaigns to engage frequent shoppers with personalised promotions or timely reminders about deals. For less frequent shoppers, use messaging that addresses specific needs or hesitations, such as abandoned cart notifications or limited-time offers on browsed items.

HOW OFTEN DO YOU SHOP ONLINE?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
2-3 times a week	28%	34%	41%	51%	36%	39%	38%
5-6 times a month	19%	34%	31%	19%	26%	27%	27%
Every few months	53%	32%	28%	30%	37%	33%	36%

IN YOUR LAST 12 MONTHS OF ONLINE SHOPPING, WHO HAVE YOU PURCHASED AN ITEM FOR THE MOST?

Who Are Consumers Shopping For: Self, Family, or Others?

Online shopping motivations often highlight a blend of personal and familial priorities. The prevalence of self-purchasing points to a strong self-reward culture, especially among Boomers and men, who prioritise practical, utility-driven purchases. There's an even split across genders when purchasing for family, with women edging it when shopping for friends. These trends enable brands to align products and campaigns with specific shopper intents for greater resonance.

Key Insights

Shopping for Self

BOOMER	82%
GEN Z	75%
MEN	75%
WOMEN	71%

73%

A notable 73% of consumers primarily shop for themselves, with Boomers (82%), Gen Z (75%), and men (75%) leading the charge compared to 71% of women.

Furry Friends

BOOMER	5%

3%

Australian's love their pets, and while only 3% of consumers shop primarily for them, this figure climbs to 5% among Boomers. Though these percentages might seem modest, they represent a significant portion of digital revenue.

Shopping for Family

GEN X	33%

Gen X (33%) are the most likely to prioritise family or household purchases.

IN YOUR LAST 12 MONTHS OF ONLINE SHOPPING, WHO HAVE YOU PURCHASED AN ITEM FOR THE MOST?

Strategic Takeaways

1. Embrace Self-Care and "Treat Yourself" Messaging
Lean into the growing culture of self-reward by promoting products as indulgences or personal pick-me-ups.

2. Highlight Family-Centric Solutions
Capture the attention of Gen X with products or bundles designed for household needs or gifting occasions. Showcase versatility and practicality in campaigns to appeal to their family-first mindset, especially during key gifting seasons or back-to-school periods.

3. Power Personalisation with Intent-Based Segmentation
Leverage first-party data to segment audiences by shopping intent. Use behavioural signals like browsing history or abandoned carts to craft highly relevant email, text, and onsite experiences.

IN YOUR LAST 12 MONTHS OF ONLINE SHOPPING, WHO HAVE YOU PURCHASED AN ITEM FOR THE MOST?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Myself	82%	63%	73%	75%	71%	75%	73%
Family/Partner	11%	33%	23%	15%	21%	21%	21%
Friends	2%	1%	1%	6%	3%	1%	2%
Pets	5%	1%	2%	3%	3%	2%	3%

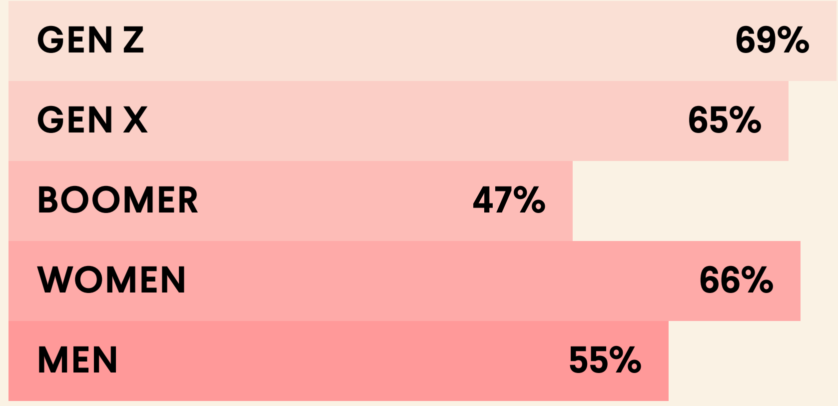
WHEN SHOPPING ONLINE, WHICH 3 CATEGORIES DO YOU PURCHASE MOST FREQUENTLY?

Broad Appeal: Top Online Shopping Categories Across Demographics

Online shopping categories in Australia showcase diverse consumer preferences, blending practicality with aspiration. Clothing and shoes dominate, favoured especially by younger consumers, while electronics and beauty products highlight gendered trends. These distinctions provide brands with valuable insights to tailor strategies and align offerings with the unique priorities of diverse consumer groups.

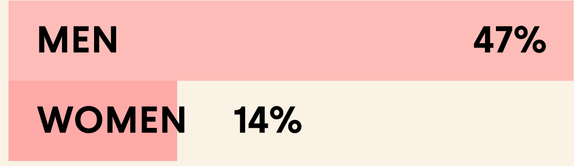
Key Insights

Fashion Dominates Across Demographics



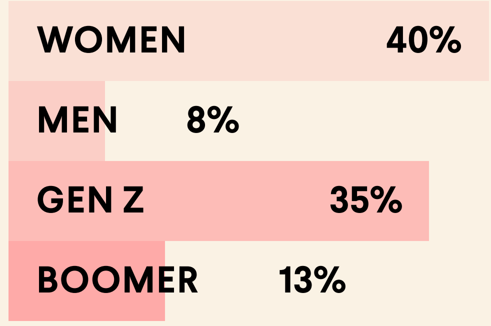
Clothing and shoes, leads as the top category with 61% of consumers. It resonates most with Gen Z (69%) and Gen X (65%), while Boomers represent the smallest share at 47%. Women (66%) show a notable preference compared to men (55%).

Electronics Appeal to Men



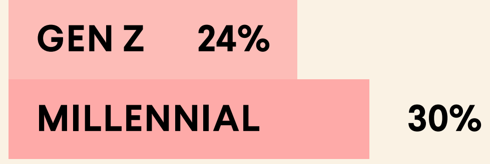
Nearly half of men (47%) prioritise electronics, compared to only 14% of women.

Beauty's Gender and Age Divide



Beauty products are a go-to for 40% of women but just 8% of men, highlighting a clear gender-driven preference. Gen Z trumps Boomers, 35% to 13% respectively.

Leisure Categories Reflect Generational Preferences



Toys and video games dominate among Gen Z (24%) and Millennials (30%), reflecting younger consumers' entertainment-focused habits.

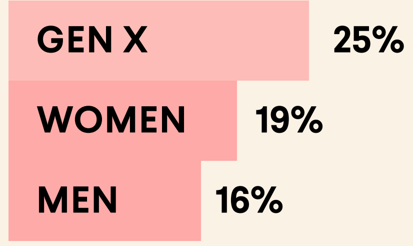
WHEN SHOPPING ONLINE, WHICH 3 CATEGORIES DO YOU PURCHASE MOST FREQUENTLY?

Key Insights

Health and Wellness Priorities for Older Generations

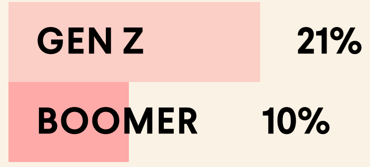
Health-related purchases peak among Gen X (20%), aligning with their lifestyle and wellness needs.

Pets Hold a Special Place



Gen X takes the lead in pet-related purchases (25%), with women (19%) outpacing men (16%) as primary pet shoppers.

Subscriptions and Gift Cards Show Niche, but Notable Appeal



Gen Z (21%) demonstrates interest in subscriptions, while gift cards resonate more with Boomers (10%).

Strategic Takeaways

1. Leverage Generational Trends in Fashion Campaigns
Develop age-inclusive marketing campaigns for clothing, emphasising versatility for Boomers and trendy, vibrant designs for Gen Z to increase engagement across age groups.

2. Expand Gender-Specific Beauty Marketing
Focus on hyper-targeted beauty campaigns for women by leveraging social media influencers, user-generated content, and AI-powered personalised recommendations. Highlight value-driven offerings like loyalty rewards to deepen engagement.

3. Promote Health and Wellness Campaigns
Create campaigns emphasising health benefits and self-care to target older demographics, especially Boomers and Gen X.

4. Highlight Technology Innovation
For electronics, spotlight innovative features and everyday utility in advertisements targeting men and Gen X consumers.

5. Engage Younger Audiences with Interactive Entertainment
Collaborate with entertainment brands to promote toys and video games. Integrate gamification elements, augmented reality, or influencer partnerships to captivate Gen Z and Millennials on their preferred social platforms.

6. Introduce Flexible Gifting Solutions
Promote gift cards and subscription services as versatile, universally appealing options for various consumer groups.

WHEN SHOPPING ONLINE, WHICH 3 CATEGORIES DO YOU PURCHASE MOST FREQUENTLY?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Clothing and Shoes	47%	65%	64%	69%	66%	55%	61%
Beauty products	13%	27%	29%	35%	40%	8%	26%
Health	19%	20%	18%	12%	22%	12%	18%
Jewellery/Watches	2%	6%	7%	19%	8%	7%	8%
Fragrances	8%	10%	9%	15%	11%	8%	10%
Toys/Video games	13%	16%	30%	24%	17%	27%	21%
Books	20%	17%	10%	6%	11%	17%	14%
Pet products	19%	25%	14%	12%	19%	16%	18%
Baby and Toddler products	4%	4%	13%	9%	9%	7%	8%
Furniture/Decor	14%	16%	9%	11%	16%	9%	12%
Appliances/Tools	27%	23%	18%	12%	13%	28%	20%
Electronics	27%	27%	33%	28%	14%	47%	29%
Gift cards	10%	9%	9%	5%	7%	11%	9%
Subscriptions	9%	8%	15%	21%	12%	13%	13%
Financial/Insurance products	12%	10%	8%	6%	5%	14%	9%

WHEN THINKING ABOUT THE AMOUNT OF ONLINE SHOPPING YOU DID IN 2024, WHICH BEST DESCRIBES YOUR PLANS FOR ONLINE SHOPPING IN 2025?

Online Shopping in 2025: What to Expect

Australians are showcasing a robust commitment to online shopping in 2025, with age and gender dynamics unveiling distinct opportunities for businesses. Younger consumers display rising optimism and heightened spending intentions, while older demographics maintain consistent habits, presenting avenues for tailored engagement strategies.

Key Insights

Younger Generations Propel Online Shopping Growth

GEN Z	37%
MILLENNIAL	35%

Gen Z (37%) and Millennials (35%) lead in plans to shop more online in 2025. In contrast, Boomers (81%) are more likely to maintain their current shopping levels, offering a steady base for engagement while younger groups drive new growth.

Gen X Represents a Balanced Middle

27%

Over a quarter (27%) of Gen X expect to shop more, positioning them as a blend of growth and consistency, with opportunities to deepen engagement.

Male Shoppers Exhibit Modest Growth Intentions

MALE	29%
FEMALE	26%

29% of male respondents intend to increase their online shopping, compared to 26% of females, suggesting slightly greater growth potential in male segments.

WHEN THINKING ABOUT THE AMOUNT OF ONLINE SHOPPING YOU DID IN 2024, WHICH BEST DESCRIBES YOUR PLANS FOR ONLINE SHOPPING IN 2025?

Strategic Takeaways

1. Engage Younger Generations with Mobile-First, Social Media-Driven Strategies
Develop seamless, mobile-optimised user experiences and leverage social media platforms to attract Gen Z and Millennials.

2. Sustain Boomer Retention
Focus on enhancing loyalty programs for Boomers, emphasising rewards for consistent shopping, easy access to discounts, and dependable customer service.

3. Target Male Shoppers with Precision Marketing
Use AI-powered insights and identity resolution to identify patterns in male shopping behaviours. Deliver personalised, timely promotions, such as exclusive discounts or limited-time shipping offers, to nudge these consumers toward greater engagement.

4. Optimise Outreach for Gen X
Position campaigns to resonate with Gen X's dual focus on practicality and occasional indulgence, such as "best price guarantees" paired with premium offers.

WHEN THINKING ABOUT THE AMOUNT OF ONLINE SHOPPING YOU DID IN 2024, WHICH BEST DESCRIBES YOUR PLANS FOR ONLINE SHOPPING IN 2025?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Shop the same amount online	81%	58%	47%	42%	53%	61%	57%
Shop more online	9%	27%	35%	37%	26%	29%	27%
Shop less online	10%	15%	17%	18%	19%	9%	15%
I don't plan to shop online in the next 12 months	1%	0%	1%	2%	1%	0%	1%

THINKING OF YOUR NON-GROCERY ONLINE PURCHASES IN 2025, WHERE WILL YOU PLAN TO PURCHASE THE MOST PRODUCTS?

Where Consumers Plan to Shop Most in 2025

Understanding where consumers intend to shop online in 2025 reveals their trust in platforms that offer convenience, value, and reliability. Online marketplaces continue to dominate as preferred shopping destinations, valued for their extensive product variety, reviews, and competitive pricing. Retailer websites hold strong appeal, especially among younger shoppers and women, while direct-to-brand channels remain an underutilised opportunity with room for growth among all demographics.

Key Insights

Online Marketplaces Dominate Overall Preferences

MALE	49%
GEN X	53%
BOOMER	44%
MILLENNIAL	44%

46%

Amazon and eBay et al capture almost half (46%) of total respondents, making them the top choice for all genders and age groups. This preference is particularly strong among male shoppers (49%), Gen X (53%), Boomers (44%), and Millennials (44%).

Direct-to-Brand Channels Appeal to Women

FEMALE	19%
MALE	15%

Female shoppers show a stronger preference for direct purchases via brand websites (19%) compared to males (15%), indicating greater potential for loyalty-driven engagement among women.

Retailer Websites Resonate with Millennials and Gen Z

GEN Z	35%
MILLENNIAL	35%

Large online retailers like Woolworths, Coles and Kmart resonate with over a third of Gen Z and Millennials (35%). These platforms thrive on their broad product offerings, ease of use, and reputation for convenience.

Apps Remain Niche, but Promising

Boomers, buck the stereotypes as the most likely generation to purchase directly in a brand's app.

THINKING OF YOUR NON-GROCERY ONLINE PURCHASES IN 2025, WHERE WILL YOU PLAN TO PURCHASE THE MOST PRODUCTS?

Strategic Takeaways

1. Maximise Marketplace Opportunities
Optimise product visibility, pricing strategies, and customer reviews on online marketplaces to align with the preferences of male shoppers and older generations, where demand is highest. Leverage these platforms to introduce new products, gather insights, and build trust among highly active shoppers.

2. Emphasise Brand Differentiation on Owned Channels
Showcase your brand's unique values and exclusivity through direct-to-consumer channels. Highlight offerings like free shipping, early access to new collections, or loyalty rewards to attract shoppers looking for personalised experiences.

3. Strengthen Retailer Partnerships
Collaborate with prominent retail platforms to engage female shoppers and Millennials who value product variety and convenience.

4. Elevate Digital Experiences Across Channels
Invest in seamless, mobile-friendly user experiences and highly personalised offers on brand websites and apps. Tailor content to reflect diverse preferences, particularly for female consumers who favour intuitive, value-driven digital interactions.

THINKING OF YOUR NON-GROCERY ONLINE PURCHASES IN 2025, WHERE WILL YOU PLAN TO PURCHASE THE MOST PRODUCTS?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
An online retail store (e.g. Woolworths, Coles, Kmart, etc.)	23%	28%	35%	35%	32%	28%	30%
An online marketplace (e.g. Amazon, Catch, eBay, etc.)	41%	53%	44%	44%	43%	49%	46%
Directly on a brand's website	20%	16%	15%	16%	19%	15%	17%
Directly in a brand's app	5%	1%	3%	2%	3%	2%	3%

WHICH OF THESE IS THE MOST TRUSTWORTHY PLACE TO BUY A PRODUCT ONLINE FROM YOUR FAVOURITE BRANDS?

Most Trusted Places to Buy Online: Retail Stores and Marketplaces Lead the Way… Just

Online retail stores such as Woolworths, Coles, and Kmart, alongside marketplaces like Amazon and eBay, are among the most trusted platforms for online shopping, valued for their reliability and convenience. These marketplaces are particularly appreciated for their extensive product variety, enabling consumers to find nearly everything they need in one place. This "one-stop-shop" experience minimises the need to browse multiple websites, saving both time and effort. However, many consumers across all generations also place significant trust in direct-to-brand shopping experiences. This highlights opportunities for brands to refine their strategies, foster deeper connections with consumers, and maximise revenue by bypassing intermediaries.

Key Insights

Generational Trust Dynamics

BOOMER	38%
GEN X	31%

Older generations, such as Boomers (38%), demonstrate a stronger preference for online marketplaces due to their reliability and convenience. In contrast, Gen X (31%) leans towards brand websites, drawn by authenticity and personalisation.

Marketplace Trust Among Genders

MEN	34%
WOMEN	30%

Men (34%) show slightly higher trust in online marketplaces compared to women (30%). This gender gap underscores the need for tailored messaging and reassurance features to enhance appeal across demographics.

Older Preferences for Brand Websites

BOOMER	27%
GEN X	31%
MILLENNIAL	30%

Older consumers, including Boomers (27%), Gen X (31%) and Millennials (30%) prioritise authenticity and exclusivity, trusting direct brand websites. This suggests a shift in focus towards unique offerings and value-driven communication.

Balance Required Across Channels

ONLINE RETAIL STORES	33%
MARKETPLACES	32%
BRAND WEBSITES	28%

While a third (33%) of consumers overall favour online retail stores, 32% choose marketplaces and 28% prefer brand websites, illustrating the need for brands to maintain a dual strategy of marketplace visibility and direct channel trust.

WHICH OF THESE IS THE MOST TRUSTWORTHY PLACE TO BUY A PRODUCT ONLINE FROM YOUR FAVOURITE BRANDS?

Strategic Takeaways

1. Optimise Marketplace Presence for Trust and Discovery
Strengthen your positioning on major marketplaces and retail sites by leveraging competitive pricing, verified reviews, and strategic product placements.

2. Invest in Direct-to-Brand Messaging for All Audiences
Build compelling direct-to-consumer campaigns that highlight brand authenticity, exclusive offerings, and sustainability.

3. Reinforce Trust on Retailer Platforms
Collaborate with retailer websites to create joint campaigns emphasising product quality and availability, targeting younger shoppers who rely on these platforms.

WHICH OF THESE IS THE MOST TRUSTWORTHY PLACE TO BUY A PRODUCT ONLINE FROM YOUR FAVOURITE BRANDS?

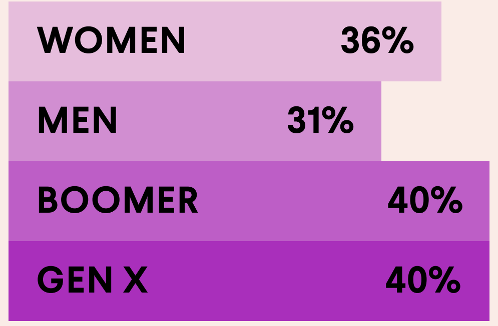
	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
An online retail store (e.g. Woolworths, Coles, Kmart, etc.)	26%	31%	38%	38%	31%	36%	33%
An online marketplace (e.g. Amazon, Catch, eBay, etc.)	38%	29%	29%	33%	30%	34%	32%
Directly on the brand's website (e.g. bonds.com.au, nike.com.au, samsung.com/au, etc.)	27%	31%	30%	23%	32%	23%	28%
Directly in the brand's app	10%	9%	4%	6%	7%	7%	7%

What Matters Most When Buying Directly from Brands

Understanding why consumers choose to shop directly from brands reveals key drivers of price, shipping and discounting. These insights are not consistent across age groups, highlighting demographic nuances. When asked about the *most important factor* in buying directly from a brand, responses revealed several key priorities.

Key Insights

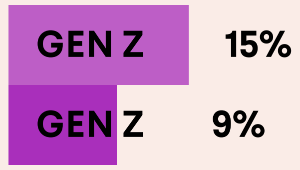
Best Price Triggers Older Shoppers



33%

Price remains the top priority, with a third (33%) of consumers favouring brands offering the best deals. Women (36%) are more price-sensitive than men (31%), and older generations (Boomers and Gen X, both 40%) lead as the most cost-conscious group. In contrast, only a quarter of Gen Z shoppers emphasise price, indicating their focus lies elsewhere.

Reviews and Reputation Drive Decisions



Gen Z shoppers (15%) are strongly influenced by product reviews, reflecting their reliance on peer validation. Gen Z also values brand name recognition (9%), emphasising the role of reputation and trust in their purchasing decisions.

Shipping Incentives Are Essential

18%

Free shipping is a crucial factor for 18% of consumers across all age groups, with older generations and women over-indexing.

Strategic Takeaways

1. Implement Triggered Messaging
Use automated email and text campaigns to target specific behaviours such as browsing or cart abandonment. Highlight competitive pricing and limited-time offers to convert cost-conscious segments like Boomers and Gen X.

2. Incentivise Purchases with Shipping Perks
Promote free shipping as a standard or loyalty-driven benefit to cater to all age groups. Consider additional options like express shipping or bundled savings to further enhance value perception.

3. Leverage Social Proof to Build Trust
Prioritise authentic reviews and user-generated content in campaigns to appeal to younger shoppers. Integrate storytelling and brand legacy into messaging to underscore reputation and build deeper connections.

4. Customise Messaging by Demographics
Tailor campaigns to reflect demographic priorities. For younger audiences, emphasise exclusivity, sustainability, and social proof. For older groups, focus on reliability, affordability, and straightforward value propositions.

WHAT MATTERS MOST TO YOU WHEN PURCHASING ONLINE DIRECTLY FROM A BRAND?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	**BOOMER**	**GEN X**	**MILLENNIAL**	**GEN Z**	**FEMALE**	**MALE**	**TOTAL**
Best price	40%	40%	28%	25%	36%	31%	33%
Discount	7%	9%	12%	14%	8%	14%	11%
Popularity of item	4%	2%	4%	1%	2%	4%	3%
Reviews	6%	5%	7%	15%	8%	7%	7%
Brand name recognition	7%	3%	8%	5%	4%	9%	6%
Convenience	2%	7%	9%	8%	6%	7%	6%
Delivery time	4%	7%	10%	11%	8%	7%	8%
Free shipping	20%	22%	15%	14%	22%	13%	18%
Ability to pick up in store	6%	3%	5%	6%	4%	6%	5%

WHAT WOULD ENCOURAGE YOU TO SHOP DIRECTLY FROM A BRAND'S WEBSITE INSTEAD OF A MARKETPLACE?

Motivators for Purchasing Directly from Brands Over Marketplaces

Direct-to-brand shopping is reshaping the eCommerce landscape, enabling brands to build stronger customer connections while accessing valuable first-party data. Unlike marketplaces, direct channels offer tailored shopping experiences that cater to individual needs. Australians are particularly drawn to these platforms for competitive pricing, exclusive rewards, and personalised experiences that foster connection and authenticity. Younger shoppers, in particular, value unique perks often unavailable on larger marketplaces.

Older shoppers, however, approach direct-to-brand purchases with caution, prioritising transparent communication, reliable delivery, and quality assurance. To succeed, brands must balance these diverse motivations, using personalisation to attract younger consumers while emphasising practical benefits for older demographics. By aligning their offerings to these preferences, brands can enhance loyalty and drive repeat purchases through their own digital storefronts.

Key Insights

Pricing Is Paramount

BOOMER 59%

GEN Z 45%

Better pricing is the top motivator for shopping directly from brands, cited by 54% of shoppers with no variation between genders.

Personalisation Appeals More to Younger Shoppers

GEN Z 14%

GEN X 9%

Gen Z (14%) place greater value on a personalised shopping experience compared to Gen X (9%), underscoring the importance of tailored engagement.

Faster Delivery Drives Convenience

MILLENNIAL 20%

Speedy delivery appeals equally to men and women, and particularly with Millennials at 20%.

Younger Consumers Seek Rewards

GEN Z 30%

Gen Z (30%) are more likely to be swayed by loyalty rewards, showcasing their preference for long-term value.

WHAT WOULD ENCOURAGE YOU TO SHOP DIRECTLY FROM A BRAND'S WEBSITE INSTEAD OF A MARKETPLACE?

Strategic Takeaways

1. Highlight Cost Benefits
Use promotions, loyalty rewards, and bundling strategies to reinforce the value proposition and encourage repeat purchases.

2. Promote Speedy Delivery as a Competitive Edge
Make faster delivery a centerpiece of your direct-to-brand offering. Highlight this benefit in marketing efforts, particularly during high-demand periods like the Christmas period and sales events.

3. Invest in Personalisation
Use first-party data to craft tailored shopping experiences that resonate with younger consumers. Offer curated recommendations, customisable options, and personalised rewards to strengthen engagement and loyalty.

4. Capitalise on Marketplace Pain Points
Emphasise the advantages of direct-to-brand shopping, such as lower prices, exclusive products, and superior customer service, to convert marketplace shoppers into brand loyalists.

WHAT WOULD ENCOURAGE YOU TO SHOP DIRECTLY FROM A BRAND'S WEBSITE INSTEAD OF A MARKETPLACE?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Better pricing or exclusive discounts	59%	58%	52%	45%	54%	54%	54%
Faster delivery options	16%	14%	20%	12%	15%	16%	16%
Better loyalty rewards	13%	19%	17%	30%	20%	17%	19%
A more personalised shopping experience	12%	9%	11%	14%	11%	12%	11%

WHICH FACTOR WOULD MOST INFLUENCE YOUR DECISION TO PURCHASE DIRECTLY FROM A BRAND ONLINE VS. IN A PHYSICAL STORE?

Factors Influencing Online vs. In-Store Purchase Decisions

The choice between online and in-store shopping is influenced by factors like price transparency, convenience, and immediate access to products. Younger Australians, particularly Gen Z and Millennials, prefer online shopping for its ease of price comparison and competitive deals, often prioritising savings over instant gratification. In contrast, older consumers, such as Boomers, favour in-store shopping for its tactile experience and the reliability of seeing products firsthand before purchasing.

Gender also shapes these preferences, with men valuing convenience more, while women show a slight preference for personalised assistance and product availability. These differences highlight the importance of cohesive omnichannel strategies that integrate the strengths of both online and in-store shopping. By addressing these motivators, businesses can better meet diverse shopper expectations and drive engagement.

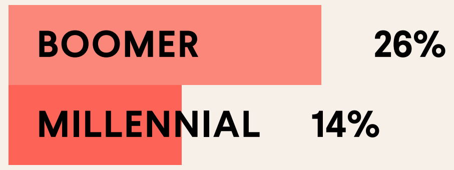
Key Insights

Price Comparisons Drive Online Shopping

42%

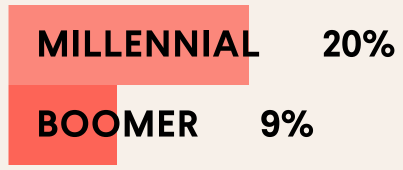
Price comparisons are the leading factor for online shopping, cited by 42% of respondents, highlighting the importance of clarity and competitive pricing.

Convenience Resonates Differently Across Generations



Boomers favour online shopping for its convenience (26%) compared to 14% of Millennials, showcasing nuances in priorities.

Speed is the Name of the Game



20% of Millennials value speed of fulfillment, compared to just 9% of Boomers.

Strategic Takeaways

1. Highlight Pricing and Transparency Online
Ensure online platforms emphasise clear pricing, discounts, and comparison tools.

2. Streamline the Online Experience
Focus on simplifying the user journey, particularly for convenience-driven shoppers like Boomers and men.

3. Integrate Omnichannel Strategies
Offer services like in-store pickup or easy returns for online orders to bridge the gap between channels. This hybrid approach meets the expectations of shoppers seeking both convenience and immediacy.

4. Custom Targeting
Identify shoppers and their preferences to push relevant campaigns tailored to their channel of choice.

WHICH FACTOR WOULD MOST INFLUENCE YOUR DECISION TO PURCHASE DIRECTLY FROM A BRAND ONLINE VS. IN A PHYSICAL STORE?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Convenience	26%	23%	14%	22%	17%	25%	21%
Price comparisons	40%	42%	40%	46%	45%	38%	42%
Product availability	25%	19%	26%	20%	23%	22%	23%
Delivery speed	9%	16%	20%	12%	15%	15%	15%

WHEN BROWSING ONLINE, WHICH HELPS YOU THE MOST WHEN MAKING A PURCHASE DECISION?

What Helps the Most When Making Online Purchase Decisions

As brands aim to drive higher-margin sales by encouraging customers to shop directly, understanding the factors that influence purchase decisions has never been more critical. When browsing online, consumers are most influenced by factors that build trust, provide validation, and offer actionable value. Customer reviews and upcoming promotions consistently top the list, while preferences for practical content or brand narratives vary by demographic. Leveraging these insights allows brands to create tailored experiences that resonate with diverse shopper segments.

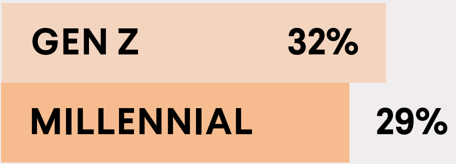
Key Insights

Detailed Product Descriptions Take the Lead

53%

Over half (53%) of consumers consider detailed product descriptions the most helpful factor, being much more important the older the shopper.

Visual Support Drives Engagement



High-quality product images resonate strongly with younger demographics, with 32% of Gen Z and 29% of Millennials ranking them as essential to their decision-making process.

Generational Preferences for Video Content

Video reviews and product demos are particularly influential for younger audiences, including Millennials and Gen Z.

WHEN BROWSING ONLINE, WHICH HELPS YOU THE MOST WHEN MAKING A PURCHASE DECISION?

Strategic Takeaways

1. Prioritise Clarity in Product Descriptions
Invest in creating comprehensive and easy-to-understand product descriptions. Highlight features, benefits, and use cases to address common consumer questions and reduce hesitation.

2. Enhance Visual Storytelling
Include high-quality images from multiple angles and lifestyle shots to engage shoppers visually. Consider interactive features, like 360-degree views or augmented reality tools, to elevate the experience.

3. Leverage Video Content for Younger Audiences
Create engaging video reviews, product demos, and tutorials tailored to Gen Z and Millennials. Showcase real-world applications and highlight key benefits in a concise, visually appealing format.

4. Leverage First-Party Insights
Use first-party data from DTC channels to personalise the shopping experience. Leverage this data to recommend related products, share relevant content, and build long-term customer relationships.

WHEN BROWSING ONLINE, WHICH HELPS YOU THE MOST WHEN MAKING A PURCHASE DECISION?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Detailed product descriptions	76%	60%	41%	32%	52%	54%	53%
Video reviews or product demos	6%	14%	21%	23%	15%	17%	16%
High-quality product images	15%	19%	29%	32%	25%	22%	24%
Styling or usage recommendations	3%	7%	9%	14%	8%	8%	8%

WHAT TYPE OF CONTENT WOULD MAKE YOU VISIT A BRAND'S WEBSITE OR APP MORE FREQUENTLY?

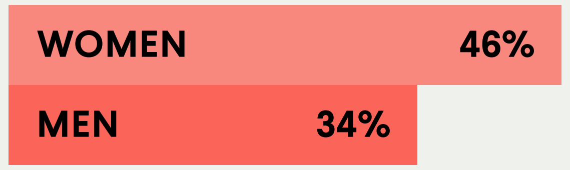
Preferred Content Types That Get Shoppers Back to Your Website

Content remains a powerful tool for influencing consumer decisions and building meaningful connections. In Australia, content preferences vary notably by age. Boomers respond strongly to traditional promotions like sales and discounts, reflecting their practical shopping habits. Conversely, Gen Z and Millennials are drawn to customer reviews.

Gender has less influence on content preferences, with both men and women equally responsive to sales promotions. This allows brands to prioritise generational tailoring over gender segmentation. The key is crafting campaigns that resonate across demographics while addressing specific motivators. By aligning content—such as sales-focused messaging for Boomers and loyalty-centric programs for younger shoppers—brands can effectively boost engagement and drive conversions.

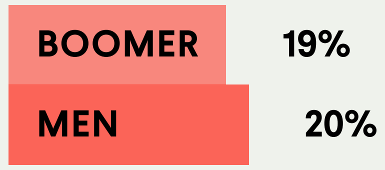
Key Insights

Customer Reviews Are Universal Motivators



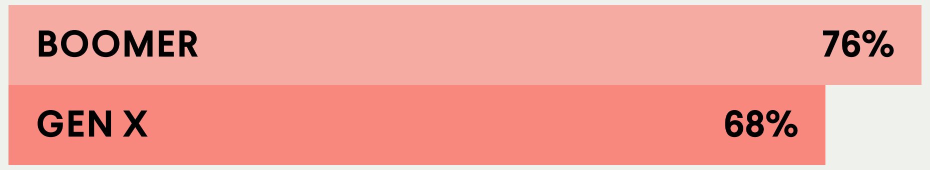
Reviews and testimonials are highly influential, with 46% of women and 34% of men identifying them as a primary reason for revisiting brand websites and apps. This preference extends across all age groups, particularly younger ones, cementing reviews as a universal engagement driver.

Boomers and Men Value Practical Guides



Practical content, such as product guides or how-to tips, resonates most with Boomers (19%) and men (20%), ranking this type of content as a key reason to visit brand websites.

Promotions and Exclusives Attract Older Audiences



Upcoming sales and exclusive offers strongly appeal to Boomers (76%) and Gen X (68%), while loyalty-driven rewards resonate particularly with older demographics.

WHAT TYPE OF CONTENT WOULD MAKE YOU VISIT A BRAND'S WEBSITE OR APP MORE FREQUENTLY?

Strategic Takeaways

1. Highlight Customer Reviews Prominently
Highlight authentic reviews and testimonials prominently on product pages, emails, and social media. Use visuals like star ratings and user-generated content to enhance credibility and trust.

2. Deliver Personalised Promotions to Younger Shoppers
Create targeted campaigns featuring upcoming sales, exclusive rewards, and personalised discounts. Leverage email and text to ensure these offers reach Gen Z and Millennials at the right time.

3. Incorporate Storytelling Elements for Younger Shoppers
Invest in high-quality images and video content that showcase products in real-life scenarios. Share behind-the-scenes content, such as the making of a product or team stories, to create emotional connections.

4. Expand Practical Content for Boomers
Develop detailed product guides, FAQs, and instructional videos to enhance their shopping experience and trust in the brand.

WHAT TYPE OF CONTENT WOULD MAKE YOU VISIT A BRAND'S WEBSITE OR APP MORE FREQUENTLY?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Product guides or how-to tips	19%	14%	13%	13%	11%	20%	15%
Behind-the-scenes brand stories	4%	7%	8%	5%	5%	8%	6%
Customer reviews or testimonials	32%	42%	44%	41%	46%	34%	40%
Upcoming sales or promotions	76%	68%	64%	69%	69%	69%	69%
Actions offering me loyalty points or rewards	45%	53%	46%	51%	52%	45%	49%

WHICH WOULD MOST LIKELY STOP YOU FROM COMPLETING AN ONLINE PURCHASE FROM A BRAND'S WEBSITE OR APP?

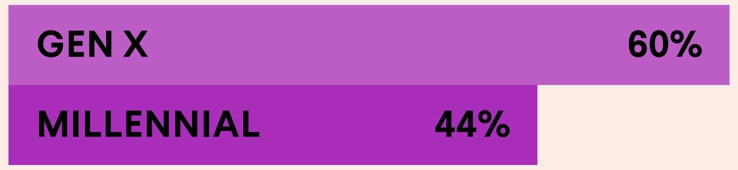
Barriers to Completing Online Purchases: Shipping Costs and Complicated Checkout Processes

Reducing cart abandonment and boosting conversion rates requires addressing the key barriers that prevent consumers from completing online purchases. High shipping costs are the most significant deterrent, especially for older shoppers who are highly sensitive to added expenses. Younger shoppers, while less price-focused, are often discouraged by complex checkout processes and a lack of trust in the platform. For these demographics, convenience, speed, and transparency are essential, with any friction leading to drop-offs.

The challenge for brands is to balance cost-effectiveness with a seamless user experience. By addressing the specific concerns of different groups—such as pricing for older shoppers and streamlined design for younger ones—brands can improve engagement and checkout completion. Solutions like simplifying workflows, adding trust signals, and offering strategic incentives can significantly reduce abandonment rates and enhance conversion.

Key Insights

Shipping Fees Dominate



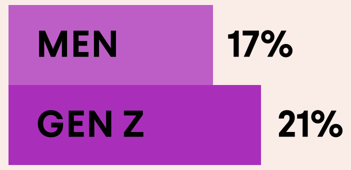
High shipping costs are the leading reason for cart abandonment, cited by 46% of shoppers. Gen X and Millennials get particularly irked, with 60% and 44%, respectively, identifying this as their top deterrent.

Stock Issues Kill Opportunity

17%

Inventory availability is the second most common barrier, frustrating shoppers, particularly men and Boomers. 17% of respondents cite out-of-stock items as the biggest blocker to completing purchases.

Complexity and Trust Issues Drive Hesitation



Among men, complicated checkout processes (17%) is a significant factor contributing to purchase hesitation. Trust issues are cited by 21% of Gen Z, emphasising the importance of a secure shopping experience.

Strategic Takeaways

1. Address Shipping Costs Transparently
Offer free or discounted shipping options whenever possible and communicate them upfront. Consider free shipping thresholds to incentivise larger order value.

2. Enhance Inventory Transparency
Provide real-time stock updates to minimise frustration over out-of-stock items, maintaining shopper trust.

3. Simplify Checkout
Streamline checkout flows with features like autofill, guest checkout, and one-click purchasing to reduce friction. Test user experiences regularly to ensure ease and use and trusted payment options.

4. Recovery Messaging
Cart abandonment tools can re-engage shoppers with tailored incentives like free shipping.

WHICH WOULD MOST LIKELY STOP YOU FROM COMPLETING AN ONLINE PURCHASE FROM A BRAND'S WEBSITE OR APP?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
High shipping costs	42%	60%	44%	34%	48%	44%	46%
Lack of trust in the brand	11%	11%	14%	21%	13%	14%	14%
Complicated checkout process	15%	9%	16%	14%	11%	17%	13%
Items out of stock	26%	9%	14%	21%	15%	18%	17%
Not enough payment options	7%	11%	12%	10%	13%	7%	10%

WHICH OFFERS COULD A BRAND MAKE ON THEIR WEBSITE OR IN THEIR APPS TO CONVINCE YOU TO OPT IN TO RECEIVE THEIR EMAILS AND/OR TEXT MESSAGES DIRECTLY FROM THEM?

What Influences Consumers to Opt-In for Emails or Text Messages?

The effectiveness of email and text marketing hinges on motivating consumers to opt into brand communications. Survey data reveals that incentives resonate differently across demographics, reflecting varied priorities and preferences. To maximise engagement and loyalty, brands must leverage these insights to create tailored opt-in strategies that align with consumer expectations.

Key Insights

Free Shipping Dominates as a Top Incentive

63%

Free shipping is the leading motivator, with 63% of respondents prioritising it.

67%

Women are particularly responsive, with 67% citing this as their key reason to opt-in.

Younger Consumers Value Exclusivity

EARLY ACCESS	22%
EXCLUSIVE CONTENT	18%

Millennials are drawn to early access (22%) and exclusive content (18%), highlighting their desire for unique and personalised brand interactions.

Loyalty Points Offer Broad Appeal

45%

Nearly half of respondents (45%) favor loyalty points as an incentive, reflecting consistent interest across all demographic groups.

VIP Services Fail to Impress

10%

Only 10% of respondents consider VIP services, such as extended warranties, important, though men show slightly higher interest in these offerings.

WHICH OFFERS COULD A BRAND MAKE ON THEIR WEBSITE OR IN THEIR APPS TO CONVINCE YOU TO OPT IN TO RECEIVE THEIR EMAILS AND/OR TEXT MESSAGES DIRECTLY FROM THEM?

Strategic Takeaways

1. Reevaluate VIP Offerings
Given the limited appeal of VIP services, consider refining these programs to include more practical benefits or bundling them with higher-priority incentives like discounts, rewards or free shipping.

2. Personalise Offers
Use identity-driven tools to tailor free shipping for consumers and exclusive access for younger ones.

3. Reward Loyalty
Promote loyalty offerings as a core opt-in benefit encouraging consumers across demographics to subscribe and stay engaged.

4. Appeal to Younger Shoppers with Exclusive Perks
Design campaigns for Millennials that offer early access to new products, exclusive discounts, and behind-the-scenes content. Use interactive formats, such as videos or gamified rewards, to enhance appeal.

WHICH OFFERS COULD A BRAND MAKE ON THEIR WEBSITE OR IN THEIR APPS TO CONVINCE YOU TO OPT IN TO RECEIVE THEIR EMAILS AND/OR TEXT MESSAGES DIRECTLY FROM THEM?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
One time discount	38%	32%	30%	32%	31%	35%	33%
Free shipping	74%	67%	57%	51%	67%	59%	63%
Loyalty points later used for rewards	41%	42%	47%	48%	46%	43%	45%
Exclusive access to content	6%	14%	18%	13%	9%	19%	13%
Early access to their new products	13%	23%	22%	20%	21%	19%	20%
VIP warranty service	7%	10%	9%	15%	11%	8%	10%

WHERE DO YOU PREFER TO LEARN ABOUT
YOUR FAVOURITE BRANDS' OFFERS OR DEALS?

Where Consumers Discover Deals and Promotions Online

Australians' discovery habits reveal distinct generational and gender-based preferences for engaging with brand deals and promotions online. Email remains dominant for older demographics, who favour direct and trustworthy communication. Social media platforms, especially brand feeds and influencer content, are increasingly capturing younger audiences with visually dynamic and interactive experiences. Gender-specific behaviours also play a role, with women more engaged with promotional social ads. Brands must leverage these insights to design inclusive, tailored campaigns that meet varied preferences across age and gender groups.

Key Insights

Websites and Emails Dominate but Skew Older

BRAND WEBSITES	42%
EMAIL	35%

Brand websites lead as the most popular channel for discovering deals (42%), with email close on 35%. These both strongly resonate with Boomers and Gen X, who prefer these direct and controlled communication formats.

Social Media Drives Engagement Among Younger Australians

GEN Z	41%
MILLENNIAL	40%

Social media ads are key for Gen Z (41%) and Millennials (40%). Additionally, half (50%) of GenZ frequently rely on organic social media feeds or discovering promotions, highlighting their preference for less curated, community-driven content.

Gender Differences in Social and Email Channels

WOMEN	32%
MEN	22%

Women are more likely to engage with social media ads (32%) compared to men (22%). Likewise, email is more appealing to female shoppers (40% vs. 29% for males), suggesting nuanced gender preferences in promotional strategies.

Friends and Family Recommendations Play a Crucial Role

25%

Trusted recommendations remain a vital channel for deal discovery, with a quarter (25%) of respondents across age groups and genders valuing input from friends and family, making it the fourth most popular method.

Strategic Takeaways

1. Tailor Content by Demographics
Prioritise email and website offers for Boomers and Gen X, while creating visually dynamic social media campaigns for Millennials and Gen Z.

2. Enhance Social Media Strategies for Younger Shoppers
Develop targeted social ad campaigns with visually engaging and authentic content to capture Gen Z and Millennial attention. Leverage organic social feeds and user-generated content to build trust and drive discovery among younger audiences.

3. Enhance Gender-Specific Marketing
Use data-driven insights to craft social media ads that appeal to female shoppers, while leveraging text for personalised and relationship-driven communication with male audiences.

4. Leverage Social Proof
Encourage sharing through refer-a-friend programs, testimonials, and influencer collaborations. Highlight real-life product experiences to capitalise on the trust placed in friends and family recommendations.

WHERE DO YOU PREFER TO LEARN ABOUT YOUR FAVOURITE BRANDS' OFFERS OR DEALS?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Text	9%	11%	8%	8%	8%	10%	9%
Email	45%	44%	26%	23%	40%	29%	35%
Search	24%	20%	12%	15%	15%	21%	17%
Brand's own website	48%	45%	40%	30%	33%	51%	42%
Brand's own app	15%	25%	22%	19%	20%	21%	21%
Brand's social media feed (Instagram, TikTok, Facebook, etc.)	11%	20%	38%	50%	35%	22%	29%
Brand's social media advertisements (Instagram, TikTok, Facebook, etc.)	9%	21%	40%	41%	32%	22%	28%
Influencer content	2%	6%	10%	16%	8%	8%	8%
In-store promotions	26%	16%	12%	22%	19%	17%	18%
TV ads	8%	8%	9%	10%	7%	11%	9%
Direct mail	17%	9%	3%	8%	7%	11%	9%
Friends or family recommendations	22%	24%	31%	17%	25%	24%	25%

WHERE DO YOU TYPICALLY MAKE A FINAL PURCHASE ON A PRODUCT YOU'VE RESEARCHED?

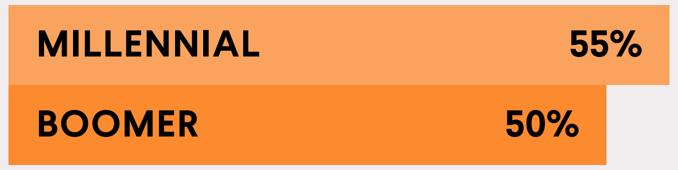
Final Purchase Decisions: Marketplaces vs. Direct Channels

Trust and exclusivity are key factors influencing Australians' purchase decisions. Direct-to-brand websites comfortably lead the way with half of consumers and particularly resonate with Millennials and Boomers. A third of Australians turn to marketplaces like Amazon, highest among Gen X, valuing their ease of use, competitive pricing, and vast product range.

This dynamic offers brands a dual opportunity: to sustain strong marketplace visibility while building direct channels that align with consumer values and expectations.

Key Insights

Owned Channels Lead



Almost (49%) half of respondents prefer completing purchases directly on a brand's website, peaking with 55% of Millennials.

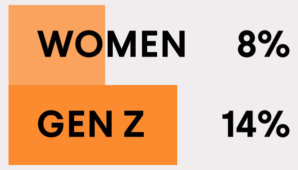
Gender Differences in Preferences

Women (51%) are more likely than men (47%) to favour brand-owned websites, reflecting their focus on building direct relationships with brands.

Marketplaces Own a Huge Slice of the Pie

31% of respondents prefer completing purchases on third-party platforms like Amazon.

Social Has a Footprint



Just 6% of consumers shop on social channels, but this rises to 8% among women and 14% of Gen Z.

WHERE DO YOU TYPICALLY MAKE A FINAL PURCHASE ON A PRODUCT YOU'VE RESEARCHED?

Strategic Takeaways

1. Strengthen Marketplace Strategies
Optimise product visibility, pricing, and reviews on dominant marketplaces like Amazon to capture consumer trust. Use these platforms as discovery and conversion drivers while maintaining a strong brand presence.

2. Strengthen Direct Channels
Invest in personalised experiences, exclusive products, and loyalty programs on brand websites to attract younger audiences. Highlight authenticity and sustainability to resonate with the values of Gen Z and Millennials.

3. Leverage Data to Drive Direct Sales
Use first-party data to create targeted campaigns that encourage repeat visits to brand websites. Offer incentives like early access to sales, personalised discounts, and tailored product recommendations to strengthen direct relationships.

4. Bridge Marketplace and Direct Channels
Use marketplaces as a springboard to funnel customers toward direct channels. Include brand messaging, exclusive offerings, or post-purchase engagement to convert marketplace buyers into loyal direct customers.

WHERE DO YOU TYPICALLY MAKE A FINAL PURCHASE ON A PRODUCT YOU'VE RESEARCHED?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Directly from the brand's website or app	50%	40%	55%	47%	51%	47%	49%
Third-party websites (Amazon, Temu, Ebay, etc.)	33%	39%	28%	25%	28%	35%	31%
On social media	0%	4%	7%	14%	8%	3%	6%
In-store	17%	17%	11%	13%	13%	15%	14%

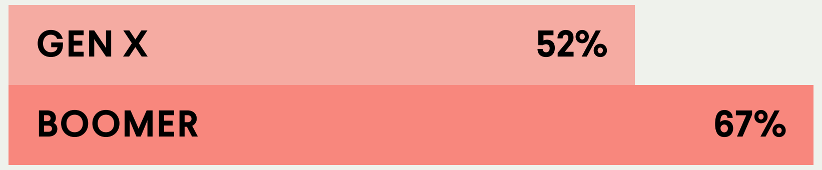
IF YOU WERE TO VISIT A BRAND'S WEBSITE OR APP, AND THAT BRAND LATER WANTED TO SEND YOU AN OFFER TO RETURN AND MAKE A PURCHASE FROM ITEMS YOU VIEWED, WHICH WOULD BE YOUR PREFERRED METHOD FOR THEM TO REACH YOU?

How to Get Consumers Back to Buy

There are a multitude of reasons why Australian consumers don't always convert first time around. Fortunately, there are opportunities to tempt them back, and the vast majority are receptive to messaging to remind them of what they left in their basket. The channels consumers prefer for this communication reveal their comfort with certain platforms and the frequency of their online interactions. Email continues to dominate as the trusted favourite across demographics, while text and app notifications are gaining traction with younger, mobile-first audiences. By tailoring outreach strategies to align with these preferences, brands can drive higher engagement, boost conversions, and foster stronger customer relationships.

Key Insights

Email Remains the Top Choice



46%

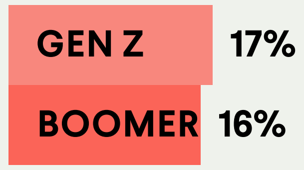
Email is the preferred channel for reengagement of almost half of respondents (46%), with Boomers leading at 67%

Push Notifications Are on the Rise

15%

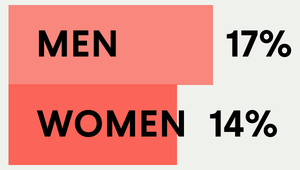
Push notifications are appreciated by 15% of respondents, with Millennials leading at 19%, indicating growing acceptance of this channel for real-time updates and offers.

Mobile Messaging Gains Appeal



Text resonates with Gen Z (17%) and Boomers (16%), demonstrating its traction across generations. However Gen Z who also show a preference for image-based MMS content, distinguishing them from other age groups.

Gender Differences in Mobile Preferences



Men (17%) are more inclined than women (14%) to engage with text offers, with the same numbers for push notifications too.

IF YOU WERE TO VISIT A BRAND'S WEBSITE OR APP, AND THAT BRAND LATER WANTED TO SEND YOU AN OFFER TO RETURN AND MAKE A PURCHASE FROM ITEMS YOU VIEWED, WHICH WOULD BE YOUR PREFERRED METHOD FOR THEM TO REACH YOU?

Strategic Takeaways

1. Email for Broad Reach
Design rich, personalised email campaigns targeting all demographics.

2. Mobile Engagement
Invest in text campaigns and push notifications for all shoppers, offering time-sensitive deals and personalised recommendations.

3. Channel Segmentation
Continuously monitor consumer engagement metrics across channels to refine strategies. Leverage feedback and behavioural data to stay ahead of shifting preferences and maximise communication effectiveness.

4. Incorporate Behavioural Triggers
Implement automated reminders, such as cart abandonment messages or notifications about price drops, to drive repeat visits and purchases.

IF YOU WERE TO VISIT A BRAND'S WEBSITE OR APP, AND THAT BRAND LATER WANTED TO SEND YOU AN OFFER TO RETURN AND MAKE A PURCHASE FROM ITEMS YOU VIEWED, WHICH WOULD BE YOUR PREFERRED METHOD FOR THEM TO REACH YOU?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Send an email	67%	52%	33%	30%	50%	41%	46%
Send a short text-only message to my mobile phone (SMS)	16%	15%	14%	17%	14%	17%	15%
Send a text message with imagery or video to my mobile phone (MMS)	3%	14%	15%	18%	12%	13%	13%
Send a push notification via their app I downloaded	13%	11%	19%	17%	14%	17%	15%
Target me with an ad placed on social media or a website that is not the brand's website	0%	7%	18%	18%	10%	12%	11%

AFTER VISITING THEIR WEBSITE OR APP, WHICH OF THE FOLLOWING MESSAGES COULD A BRAND SEND YOU THAT WOULD HELP PERSUADE YOU TO PURCHASE DIRECTLY FROM THEIR WEBSITE OR APP?

Unlocking the Power of Messaging to Drive Conversions

Crafting impactful messaging offers is essential for driving direct purchases and fostering long-term customer loyalty. Email and text remain unparalleled tools for delivering highly personalised and timely messages. These channels enable brands to cut through the noise of crowded digital landscapes, targeting consumers with offers that align with their preferences, shopping behaviours, and position in the customer journey.

By strategically leveraging these direct communication methods, brands can increase immediate conversions, recover lost sales, and build lasting relationships that turn shoppers into loyal customers and advocates. When asked which types of triggered messaging offers would persuade purchases on brand websites, consumers identified several key motivators.

Key Insights

Discount Codes and Price Drop Alerts Dominate

PRICE DROPS 60%
DISCOUNTS 52%

Financial incentives are the most influential, with 60% of consumers citing price drops on previously viewed items and 52% identifying discounts as top motivators.

Low-Stock Warnings Drive Action

GEN Z 26%

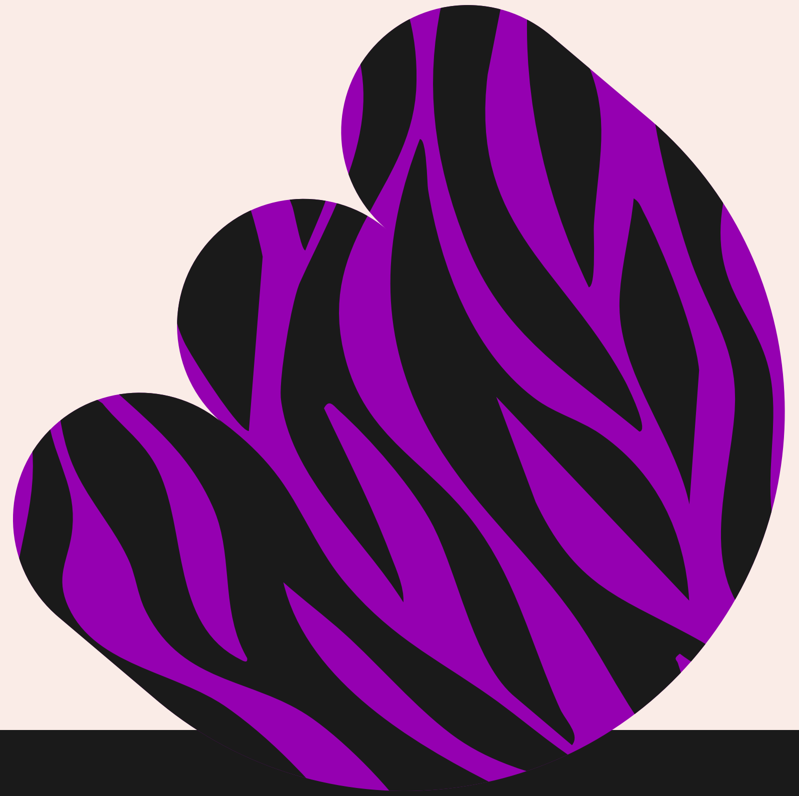
18%

Low-stock alerts move 18% of consumers, with Gen Z (26%) showing a stronger preference for this urgency-driven tactic.

Back-in-Stock Notifications Resonate

MILLENNIAL 29%
GEN Z 28%

Alerts about back-in-stock items appeal most to Millennials (29%) and Gen Z (28%), highlighting their shared interest in securing desired products.



AFTER VISITING THEIR WEBSITE OR APP, WHICH OF THE FOLLOWING MESSAGES COULD A BRAND SEND YOU THAT WOULD HELP PERSUADE YOU TO PURCHASE DIRECTLY FROM THEIR WEBSITE OR APP?

Key Insights

Loyalty Programs Appeal Across the Board

MILLENNIAL	35%
GEN Z	30%

Over a third of Millennials (35%) find offers tied to rewards programs motivating, emphasising their appreciation for long-term value. Loyalty incentives dips to 30% of Gen Z.

Gender-Based Preferences Highlight Functional Appeal

MEN	21%
WOMEN	27%

Men favour abandoned cart reminders (21%), while women prefer back-in-stock notifications (27%).

Strategic Takeaways

1. Leverage Financial Incentives
Focus on using discount codes and price drop notifications, ensuring they are prominently featured across email and text channels to appeal to broad audiences.

2. Emphasise Urgency
Craft targeted campaigns with low-stock and back-in-stock notifications for hesitant shoppers, particularly for women.

3. Expand Loyalty Program Messaging
Develop messaging campaigns tied to loyalty programs, focusing on older demographics like Boomers who value ongoing rewards. Showcase points accumulation, redemption options, and exclusive member benefits.

4. Leverage Behavioural Triggers
Implement automated messages like cart reminders and tailored product recommendations to re-engage consumers based on browsing history.

AFTER VISITING THEIR WEBSITE OR APP, WHICH OF THE FOLLOWING MESSAGES COULD A BRAND SEND YOU THAT WOULD HELP PERSUADE YOU TO PURCHASE DIRECTLY FROM THEIR WEBSITE OR APP?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Price drop offer on a single item I viewed	71%	65%	55%	45%	60%	59%	60%
General brand sale across many items	29%	30%	25%	30%	29%	27%	28%
Discount codes	41%	59%	52%	57%	56%	47%	52%
Reminders for items I left in my cart	18%	16%	22%	18%	17%	21%	19%
Loyalty program offers	32%	34%	35%	30%	33%	33%	33%
Notice that an item I viewed online is back in stock	25%	21%	29%	28%	27%	24%	26%
Notice that an item I viewed online is low in stock	19%	12%	17%	26%	17%	19%	18%
New items that are similar to what I viewed previously	12%	19%	21%	28%	18%	21%	19%

HOW LIKELY ARE YOU TO PURCHASE FROM A BRAND'S EMAIL, TEXT, OR APP PUSH NOTIFICATION HIGHLIGHTING THE SAME PRODUCTS YOU RECENTLY BROWSED ON THEIR WEBSITE OR IN THEIR APP?

How Triggered Messaging Based on Behavior Influences Purchase

Behaviour-driven messaging is a powerful tool for influencing consumer purchase decisions. When personalised, timely, and relevant, these messages can nudge shoppers toward completing their purchases. Millennials and Gen Z, in particular, are more likely to engage with messages tailored to their recent activities, such as reminders about abandoned carts or suggestions for related products.

Key Insights

Behavior-Driven Messaging Is Highly Influential

84%

Overall, 84% of respondents are either somewhat likely, or very likely to purchase when brands send messages about recently viewed products.

Generational Preferences Highlight Personalisation's Impact

MILLENNIAL	93%
GEN Z	89%

Millennials (93%) and Gen Z (89%) are the most responsive to personalised messages, underscoring the importance of tailored outreach for younger, digitally savvy audience.

Strategic Takeaways

1. Cart Abandonment Strategies
Implement automated emails and push notifications reminding shoppers about items left behind.

2. Tailored Product Suggestions
Use AI-driven recommendations to highlight products that align with browsing history.

3. Build Trust with Boomers
Focus on reinforcing product benefits and availability in behaviour-driven messages. Pair this with transparent pricing or promotions to convert interest into action.

4. Optimise Timing for Maximum Impact
Deliver triggered messages with the right message at the right time after consumer actions while interest remains high.

HOW LIKELY ARE YOU TO PURCHASE FROM A BRAND'S EMAIL, TEXT, OR APP PUSH NOTIFICATION HIGHLIGHTING THE SAME PRODUCTS YOU RECENTLY BROWSED ON THEIR WEBSITE OR IN THEIR APP?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Very likely	11%	16%	24%	12%	18%	16%	17%
Somewhat likely	58%	67%	69%	77%	68%	66%	67%
Not likely	31%	16%	7%	11%	15%	18%	16%

BRANDS ARE NOW USING AI, ALONG WITH YOUR PREVIOUS BROWSING AND PURCHASE HISTORY, TO OFFER MORE PERSONALISED PRODUCT AND SERVICE RECOMMENDATIONS FOR YOU. HOW DO YOU FEEL ABOUT THIS?

Consumer Sentiment on AI Personalisation in Shopping

AI-driven personalisation is transforming eCommerce, offering tailored experiences that enhance convenience and relevance. While many Australian consumers appreciate these advancements, concerns about data privacy persist, particularly among older demographics. Younger shoppers, however, are more enthusiastic, viewing AI as a tool for enriched shopping journeys, including personalised recommendations and dynamic pricing. Brands that strike the right balance between personalisation and transparency are well-positioned to thrive in this evolving landscape.

Key Insights

Growing Enthusiasm for AI Personalisation

MILLENNIAL	42%
GEN Z	38%

32%

Almost a third (32%) of respondents embrace AI-driven personalisation. Millennials lead the charge at 42%, closely followed by Gen Z at 38%.

Skepticism Among Boomers

21% {?}

In contrast, 21% of Boomers express discomfort with AI-driven personalisation, highlighting the importance of transparent data practices to build trust with this group.

Gender Differences in Sentiment

MEN	37%
WOMEN	29%

Men (37%) are more likely than women (29%) to embrace AI personalisation, reflecting differing levels of trust and perceived benefits.

Strategic Takeaways

1. Transparency is Key
Build trust by clearly communicating how consumer data is collected and used. Implement robust privacy policies and use messaging that reassures shoppers, especially Boomers, about the security of their information.

2. Leverage AI for Relevance
Use Wunderkind's AI-powered tools to deliver hyper-relevant content that improves the customer experience.

3. Educate Older Audiences
Develop educational content that demystifies AI, showing how it enhances their shopping journey.

4. Maintain a Human Touch in Personalisation
Use storytelling, brand voice, and emotional connections to ensure the experience feels authentic and relatable, appealing to all demographics.

BRANDS ARE NOW USING AI, ALONG WITH YOUR PREVIOUS BROWSING AND PURCHASE HISTORY, TO OFFER MORE PERSONALISED PRODUCT AND SERVICE RECOMMENDATIONS FOR YOU. HOW DO YOU FEEL ABOUT THIS?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
I love it, bring it on	21%	27%	42%	38%	29%	37%	32%
I'm not sure yet	43%	53%	46%	43%	49%	44%	47%
I don't feel comfortable with this	36%	19%	12%	19%	23%	19%	21%

WHICH OF THE FOLLOWING WOULD INCREASE YOUR LOYALTY TO AN ONLINE BRAND?

Key Drivers of Online Loyalty: Free Shipping, Personalisation, and Service

Building customer loyalty requires consistently delivering value and meeting evolving shopper expectations. Free or fast shipping remains the most influential loyalty driver across demographics, while younger consumers are drawn to personalised experiences and unique rewards. Successful loyalty strategies blend practical benefits with emotional connections to create lasting relationships and foster brand advocacy.

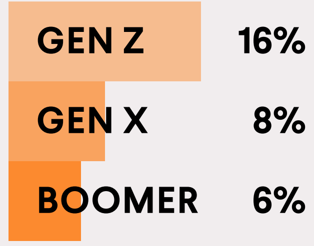
Key Insights

Delivery Expectations Lead Loyalty Drivers

49%

Nearly half of respondents (49%) cite free or fast shipping as the top factor for increasing loyalty. Women prioritise this benefit the most, with 55% highlighting its importance compared to 42% of men.

Younger Shoppers Crave Personalisation



Gen Z (16%) expect personalised recommendations and loyalty rewards, compared to just 8% of Gen X and 6% of Boomers, emphasising the importance of tailored engagement for this group.

Customer Service Remains Vital

25%

Excellent customer service continues to play a crucial role, with a quarter (25%) of consumers valuing this aspect of their shopping experience.

Generational Focus on Seamless Experiences

Younger shoppers prefer streamlined, intuitive websites and apps, while older generations want straightforward, reliable services.

WHICH OF THE FOLLOWING WOULD INCREASE YOUR LOYALTY TO AN ONLINE BRAND?

Strategic Takeaways

1. Emphasise Shipping Benefits
Offer free or express shipping options as core features of loyalty programs to appeal to broad audiences.

2. Personalise Loyalty Strategies
Use AI to deliver customised recommendations and rewards that resonate with Gen Z and Millennials.

3. Highlight Customer Service Excellence
Showcase testimonials and metrics related to service quality to reinforce trust among shoppers valuing reliable support.

4. Long-Term Engagement
Wunderkind's AI-driven solutions can help brands maintain personalised connections that build loyalty over time.

WHICH OF THE FOLLOWING WOULD INCREASE YOUR LOYALTY TO AN ONLINE BRAND?

	AGE GROUP				GENDER		EVERYONE
RESPONSE	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Faster or free delivery	50%	61%	43%	42%	55%	42%	49%
A seamless and intuitive website/app experience	13%	8%	21%	21%	13%	20%	16%
Excellent customer service	31%	23%	25%	20%	26%	24%	25%
Personalised shopping recommendations	6%	8%	11%	16%	6%	14%	10%

Conclusion

The 2025 consumer landscape presents both challenges and transformative opportunities for brands ready to adapt. As trust becomes an increasingly critical factor in purchasing decisions, brands must focus on building transparent, authentic relationships with their audiences. Whether through better pricing, personalisation, or seamless shopping experiences, Australian consumers are making it clear: they want brands to meet their needs directly and meaningfully.

Key themes include the dominance of smartphones as shopping devices, the growing influence of younger generations in shaping online shopping trends, and the rise of direct-to-brand interactions, driven by a desire for exclusivity, personalisation, and value.

Shipping costs remain a significant barrier for Australian consumers, emphasising the need for free or affordable delivery options. Loyalty, meanwhile, hinges on tailored experiences, exceptional service, and tangible incentives. AI-powered personalisation is especially effective among younger audiences, though transparency and trust are crucial for gaining acceptance among older shoppers.

Triggered email and text campaigns represent a particularly powerful opportunity. By leveraging first-party data and AI, brands can engage shoppers at the right moment, whether it's with a back-in-stock alert, a reminder about an abandoned cart, or a personalised product recommendation. These timely, tailored interactions not only boost conversions but also deepen loyalty, moving consumers away from marketplaces and toward direct-to-brand channels.

As privacy regulations evolve and third-party data becomes a thing of the past, brands that focus on trust-building, delivering value, and harnessing first-party data will gain a competitive edge. Wunderkind sits at the heart of this transformation. With expertise in triggered messaging, identity resolution, and performance marketing, we empower brands to create experiences that resonate with today's privacy-conscious and value-driven Australian consumers.

The tools to thrive in this evolving digital commerce landscape are at your fingertips. Now is the time to harness them, and Wunderkind is here to help you do just that. Let's make 2025 your strongest year yet.

Unlock the Power of Identity Resolution

Wunderkind's Identity solution transforms brand-customer connections empowering marketers to deliver personalised experiences, ensuring privacy, compliance, and seamless cross-device engagement, leveraging powerful first-party data insight.

Download Now →

The Power of Acquisition

Unlock the power of first-party data with our comprehensive guide, designed to help you turn website visitors into engaged customers. Learn how to collect emails and phone numbers, leverage behavioural targeting for personalised marketing, and ensure compliance with privacy laws, all while boosting conversion rates at a lower cost than paid media.

Download Now →

Success Stories from Leading Brands

Discover how leading brands are leveraging Wunderkind's Autonomous Marketing Platform to drive personalised engagement, boost revenue, and enhance customer loyalty. By utilising identity-powered messaging, first-party data, and seamless cross-channel campaigns, these brands are turning unknown traffic into known and seeing huge lifts in revenue.

Learn More →

The Performance Marketing Solution

At Wunderkind, we drive meaningful, measurable outcomes for our clients. With identity and permissioning at the heart of our business, Wunderkind has the data and expertise to help you scale owned revenue channels while providing a premium experience for your customers, all while guaranteeing a lift in revenue.

Drive Unmatched Revenue →

Wunderkind

Wunderkind is the leading AI-driven performance marketing solution that collects consent-based, first-party data and identifies anonymous traffic for brands in order to scale hyper-personalised one-to-one messages. Brands lean on the Wunderkind Identity Network, a proprietary database recognising 9 billion devices and 1 billion consumers, and observes 2 trillion digital transactions every year, to trigger the most impactful offers to their target audience at the right moment and in the right channel. This proprietary data is accessed by Wunderkind's Autonomous Marketing Platform, an AI engine that integrates seamlessly into a brands' existing ESP to boost performance across email, text and advertising channels.

Wunderkind is the only performance solution that guarantees a lift in revenue for its clients and delivers over $5 billion in directly attributable revenue annually for brands across a number of industries, often ranking as a top 3 revenue channel in clients' own analytics platforms. Brands such as Harley-Davidson, Perry Ellis International and Shoe Carnival partner with Wunderkind to drive top-line revenue through its guaranteed results.

HARLEY-DAVIDSON MOTOR CYCLES

PERRY ELLIS

SHOE CARNIVAL