Wunderkind

U.S.

2025 Consumer Insights Report

FOR DIGITAL COMMERCE

✹ Introduction

As we step into 2025, the global landscape remains turbulent, with significant implications for consumer behavior and the brand-consumer relationship. Economic uncertainty continues, fueled by fluctuating interest rates and the looming specter of a potential recession. Geopolitical tensions, including the ongoing conflict in Ukraine, persist, affecting global economies and dampening consumer confidence. In addition, the recent U.S. presidential election cycle has heightened uncertainty, influencing purchasing behaviors and economic sentiment.

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 personalization, 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 particularly challenging. The U.S. elections drove an astounding $12.3 billion in digital advertising spend—a 30% increase over the 2020 election. Competing for consumer attention on paid channels is always difficult, but the scarcity of ad inventory and the increased costs driven by large political ad budgets made it even more so.

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 personalized. 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 recognize 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 the United States continues to evolve, reshaping how American consumers interact with brands and make purchase decisions. U.S. shoppers increasingly demand convenience, personalization, 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 U.S.-focused edition of the 2025 Consumer Insights Report, we delve into the preferences, expectations, and behaviors of American 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-personalized, 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 Z, 98% for Millennials, and 95% overall. However, desktops still play a significant role, especially for Boomers (82%) and male shoppers (81%). This underscores the need for mobile-first strategies while maintaining desktop optimization.

2. Younger Shoppers Drive Frequency
Millennials and Gen Z dominate shopping frequency, with 55% and 48% respectively shopping online 2-3 times a week compared to 44% for Boomers. Leveraging loyalty programs and engagement campaigns can help sustain these habits.

3. Self-Purchases Lead the Way
Most shoppers buy primarily for themselves, a trend most notable among Gen Z (72%) and male shoppers (69%). In contrast, Boomers and women are more likely to shop for family or partners, suggesting an opportunity for tailored messaging.

4. Value and Personalization Drive Direct-to-Brand Purchases
Better pricing motivates 60% of both male and female shoppers to choose direct-to-brand options. Meanwhile, younger consumers prioritize exclusive rewards and personalized experiences.

5. Shipping Costs Are a Dealbreaker
Shipping fees are the leading cause of cart abandonment, especially for Boomers (51%) and women (47%). Solutions like free shipping thresholds or bundling discounts can help counteract this.

6. Demographic-Specific Content Boosts Engagement
Sales promotions appeal across the board, but Millennials (48%) engage more with loyalty-focused content, while Boomers (69%) favor traditional incentives like free shipping.

7. Email Remains the Preeminent Channel for Messaging
Email is the top channel for older shoppers, favored by 59% of Boomers and 41% of men. Meanwhile, younger and mobile-first audiences like Gen Z and Millennials prefer text and app notifications.

8. AI Personalization: A Key Growth Opportunity
AI-driven personalization excites Gen Z (52%) and Millennials (60%), though Boomers remain cautious (15%). Transparent communication around data use can help build trust across demographics.

9. Marketplaces Rule for Convenience, But Direct Channels Are Rising
Marketplaces like Amazon lead with over half (53%) of shoppers. However, younger audiences, particularly Gen Z (8%), are increasingly drawn to direct-to-brand sites and apps for exclusivity and authentic connections.

10. Urgency and Relevance Drive Purchases
Limited-time offers and discount codes are highly effective across demographics. Gen Z and Millennials also respond strongly to inventory alerts, such as low-stock and back-in-stock notifications (28% for both groups).

Methodology

In partnership with MX8 Labs, Wunderkind conducted the 2025 Consumer Insights Report, focusing on U.S. consumers. Building on last year's findings, this report delves into the latest trends shaping online purchasing behavior across the United States.

This year's research explores U.S. consumers' 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 centers on U.S. consumers, additional insights into U.K., Australian, or industry-specific trends are available in our content hub.

Wunderkind
X
MX8 LABS

526

Insights are drawn from a representative sample of 526 U.S. consumers, reflecting diversity across gender, ethnicity, age, and household income. *Data collection was completed in December 2024.*

Devices Shoppers Rely on Most for Online Purchases

The devices consumers use for online shopping reveal much more than just convenience; they highlight how technology continues to shape purchasing behaviors. Smartphones dominate as the preferred device, offering unmatched portability and immediacy that suit the fast-paced lifestyles of modern consumers. At the same time, desktops maintain their relevance, particularly for Boomers and men, who appreciate larger screens and detailed browsing capabilities. Tablets also contribute to the multi-device eCommerce landscape, often favored for casual shopping experiences. To meet these evolving preferences, marketers must craft strategies that ensure seamless experiences across all platforms.
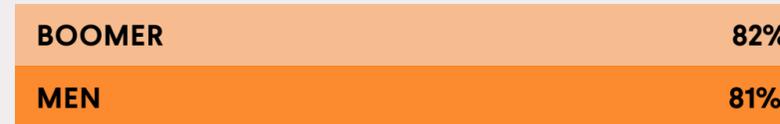
Key Insights

Mobile First

GEN Z	99%
MILLENNIAL	98%
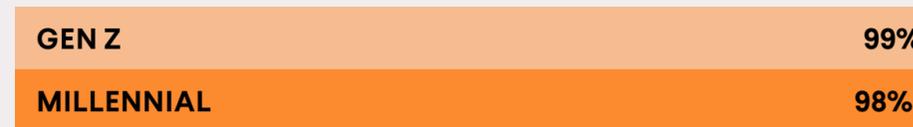
95%

Smartphones are the device of choice for 95% of respondents, with Gen Z (99%) and Millennials (98%) leading adoption.

Desktop Strength
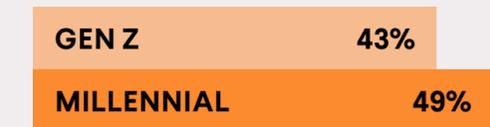
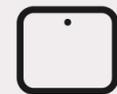|	
BOOMER	82%
MEN	81%

74%

Desktops remain highly relevant, with almost three-quarters (74%) of consumers turning to them, rising to 82% among Boomers and 81% among men, highlighting their importance for detailed research and browsing.

Don't Forget About Tablets

GEN Z	43%
MILLENNIAL	49%

46%

Nearly half (46%) of consumers use tablets for online shopping, with adoption ranging from 43% among Gen Z to 49% for Millennials.

Strategic Takeaways

1. Optimize for Mobile
Design fast-loading, mobile-friendly platforms with intuitive navigation and streamlined checkout experiences. Tailor these experiences to engage younger, mobile-first audiences like Gen Z and Millennials, who prioritize 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 recognize shoppers across devices and sessions. Implement a unified cross-channel messaging strategy that provides personalized, consistent communication, ensuring every interaction builds trust and strengthens customer relationships.

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
A smartphone	91%	93%	98%	99%	93%	96%	95%
A personal desktop computer/laptop	82%	73%	69%	67%	66%	81%	74%
A tablet	46%	47%	49%	43%	45%	48%	47%

How Often Consumers Shop Online

The frequency with which consumers shop online speaks to how inherent digital commerce has become in their daily lives. Millennials and Gen Z are leading the charge, shopping online multiple times a week, fueled by convenience and ingrained habits. This high engagement offers brands a prime opportunity to cultivate loyalty, while Boomers and Gen X require tailored strategies to transform occasional visits into regular shopping behaviors. These insights underscore the importance of aligning marketing strategies with the unique preferences and behaviors of each demographic

Key Insights

Frequent Shoppers Across Genders

|	
MEN	48%
WOMEN	45%
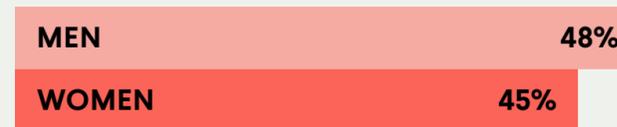
Men (48%) and women (45%) shop online 2-3 times weekly at similar rates, with men slightly more likely to report this frequency.

Millennials Dominate Digital Shopping

MILLENNIAL	55%

Millennials are the most active group, with 55% shopping online 2-3 times weekly. Their affinity for convenience, coupled with high multi-device ownership, calls for mobile-optimized and seamless omnichannel experiences.

Boomers and Gen X Favor Planned Purchases
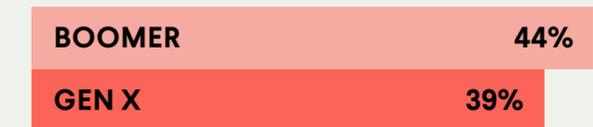
BOOMER	44%
GEN X	39%

Boomers (44%) and Gen X (39%) also shop 2-3 times weekly but tend to make fewer, more deliberate purchases. Campaigns that emphasize value, trust, and product quality guarantees can effectively resonate with these audiences.

Strategic Takeaways

1. Build Loyalty Through Habits
Develop compelling rewards programs that encourage regular shopping, particularly among younger audiences. Incentives such as exclusive discounts, early access to new products, or gamified loyalty tiers can deepen engagement and reinforce habitual shopping behaviors.

2. Target Occasional Shoppers
For Boomers and Gen X, highlight convenience-focused offerings that simplify decision-making and resonate with their preference for deliberate, planned purchases.

3. Behavioral Messaging for Action
Leverage triggered emails and text campaigns to engage frequent shoppers with personalized promotions or timely reminders about deals. For less frequent shoppers, use messaging that addresses their specific needs or hesitations, such as abandoned cart notifications or limited-time offers on items they've browsed.

HOW OFTEN DO YOU SHOP ONLINE?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
2–3 times a week	44%	39%	55%	48%	45%	48%	46%
5–6 times a month	23%	40%	29%	19%	28%	29%	29%
Every few months	33%	22%	16%	33%	27%	23%	25%

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

Understanding the motivations behind shopping behaviors unveils valuable insights into consumers' emotional triggers and decision-making processes. Self-purchases are dominant, underscoring a shift toward self-rewarding habits, particularly among younger generations. Meanwhile, family-centric shopping is more prevalent among women and Boomers, often reflecting household responsibilities or gifting occasions. These trends enable brands to align products and campaigns with specific shopper intents for greater resonance.

Key Insights

Shopping for Self

GEN X	72%
MILLENNIAL	67%
MEN	69%
WOMEN	62%

65%

A notable 65% of consumers primarily shop for themselves, with Gen Z (72%), Millennials (67%), and men (69%) leading the charge compared to 62% of women.

Furry Friends

WOMEN	8%
GEN X	9%

5%

While only 5% of consumers shop primarily for their pets, this figure climbs to 8% among women and 9% among Gen X. Though these percentages might seem modest, they represent a significant portion of digital revenue.

Shopping for Family

WOMEN	28%
BOOMER	30%

27%

Women (28%) and Boomers (30%) are the most likely to prioritize family or household purchases.

Strategic Takeaways

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

2. Highlight Family-Centric Solutions
Capture the attention of women and Boomers 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 Personalization with Intent-Based Segmentation
Leverage first-party data to segment audiences by shopping intent. Use behavioral 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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Myself	65%	60%	67%	72%	62%	69%	65%
Family/Partner	30%	27%	27%	22%	28%	26%	27%
Friends	0%	1%	1%	4%	1%	1%	1%
Pets	5%	9%	5%	1%	8%	3%	5%

Broad Appeal: Top Online Shopping Categories Across Demographics

Understanding consumer preferences across demographics uncovers the blend of functionality, aspiration, and convenience driving online shopping behaviors. Categories like fashion, electronics, and beauty dominate, but their appeal varies significantly by age and gender. These distinctions provide brands with valuable insights to tailor strategies and align offerings with the unique priorities of diverse consumer groups.
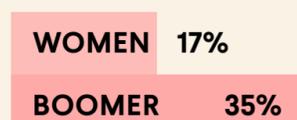
Key Insights

Fashion Reigns Supreme Across Generations

|	
GEN Z	65%
BOOMER	64%
MILLENNIAL	54%
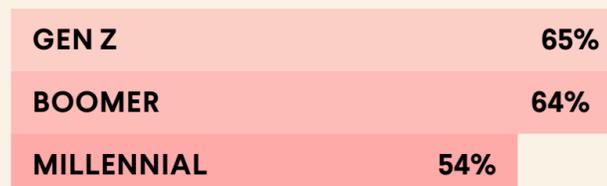
Fashion, including clothing and shoes, leads as the top category with 60% of consumers. It resonates most with Gen Z (65%) and Boomers (64%), while Millennials represent the smallest share at 54%.

Electronics Capture Male Attention

WOMEN	17%
BOOMER	35%

Nearly half of men (49%) prioritise electronics, compared to only 17% of women. Boomers also show strong interest in this category, with 35% naming it a priority.

Beauty's Gender Divide

WOMEN	40%
MEN	15%
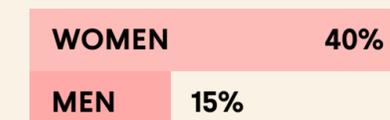
Beauty products are a go-to for 40% of women but just 15% of men, highlighting a clear gender-driven preference.

Leisure Categories Reflect Generational Preferences

GEN Z	32%
MILLENNIAL	25%

Toys and video games dominate among Gen Z (32%) and Millennials (25%), reflecting younger consumers' entertainment-focused habits.

Key Insights

Gen Z's Style-Driven Choices

FRAGRANCES	19%
JEWELRY	16%

Gen Z leads in preference for fragrances (19%) and jewelry (16%), emphasizing personal style and identity-driven products.

Pets Hold a Special Place

GEN X	31%
WOMEN	28%
MEN	19%

Gen X takes the lead in pet-related purchases (31%), with women (28%) outpacing men (19%) as primary pet shoppers.

Health and Wellness Priorities for Older Generations

BOOMER	25%

Health-related purchases peak among Boomers (25%), aligning with their lifestyle and wellness needs.

Strategic Takeaways

1. Leverage Generational Trends in Fashion Campaigns:
Develop age-inclusive marketing campaigns for clothing, emphasizing 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 personalized recommendations. Highlight value-driven offerings like loyalty rewards to deepen engagement.

3. Highlight Technology's Practical Value
Emphasize innovation, durability, and functionality in electronics campaigns. Tailor content to resonate with male audiences and Gen X, using channels like email and text, where these groups are most responsive.

4. 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.

5. Promote Health and Wellness for Seniors:
Position health-related products prominently in loyalty programs and email campaigns targeting Boomers. Use personalized messaging that reflects their preferences for reliability.

6. Incorporate Storytelling into Style-Driven Categories:
Use storytelling to enhance marketing for fragrances and jewelry, linking products to aspirational lifestyles that resonate with Gen Z.

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Clothing and Shoes	64%	59%	54%	65%	64%	56%	60%
Beauty products	20%	32%	32%	30%	40%	15%	28%
Health	25%	23%	24%	18%	25%	21%	23%
Jewelry/Watches	8%	9%	7%	16%	10%	9%	9%
Fragrances	3%	8%	13%	19%	12%	8%	10%
Toys/Video games	10%	22%	25%	32%	17%	25%	21%
Books	34%	12%	10%	8%	17%	17%	17%
Pet products	26%	31%	18%	16%	28%	19%	23%
Baby and Toddler products	5%	5%	11%	11%	9%	6%	8%
Furniture/Decor	11%	10%	11%	9%	12%	8%	11%
Appliances/Tools	22%	17%	14%	12%	10%	24%	17%
Electronics	35%	32%	32%	28%	17%	49%	32%
Gift cards	11%	10%	10%	9%	9%	12%	10%
Subscriptions	2%	9%	9%	11%	4%	10%	7%
Financial/Insurance products	4%	3%	5%	5%	4%	5%	4%

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

Online shopping in 2025 is poised for transformation, driven by advancements in technology, shifting consumer expectations, and broader societal trends. Shopping behaviors will evolve with distinct patterns emerging across gender and age demographics. These differences create valuable opportunities for brands to craft tailored strategies that elevate consumer engagement and drive loyalty in the ever-competitive eCommerce landscape. Here's a closer look at how gender and age are shaping the future of online shopping.

Key Insights

Men Show Stronger Growth Potential in Online Shopping

| MEN | 33% |
| WOMEN | 26% |

13% vs 7%

A notable 33% of men plan to increase their online shopping in 2025, compared to 26% of women. Women, however, are more likely to reduce their online shopping (13% vs. 7% of men), highlighting an opportunity for loyalty-building campaigns aimed at male shoppers.

Boomers Represent a Stable Revenue Stream

64%

With 64% of Boomers planning to shop online at the same rate as in 2024, this group demonstrates consistent habits. Brands can capitalize on this reliability by offering loyalty incentives and personalized experiences to sustain engagement.

Younger Generations Propel Online Shopping Growth

GEN Z	31%
MILLENNIAL	32%
BOOMER	64%
GEN X	61%

Gen Z (31%) and Millennials (32%) lead in plans to shop more online in 2025. In contrast, Boomers (64%) and Gen X (61%) are more likely to maintain their current shopping levels, offering a steady base for engagement while younger groups drive new growth.

Opportunities to Convert Undecided Shoppers

Across all demographics, a substantial share of consumers plans to maintain their current online shopping levels. Effective marketing campaigns, enhanced shopping experiences, or tailored promotions could sway these shoppers to increase their activity.

Strategic Takeaways

1. Target Male Shoppers with Data-Driven Offers
With men demonstrating stronger growth potential, implement personalized campaigns featuring exclusive deals, VIP-tier loyalty benefits to engage and convert this audience effectively.

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

3. Reward Loyalty Among Boomers and Gen X
Focus on enhancing loyalty programs for these groups, emphasizing rewards for consistent shopping, easy access to discounts, and dependable customer service. For Boomers, highlight practical benefits; for Gen X, underscore convenience and personalization.

4. Leverage AI and Identity Resolution for Undecided Shoppers
Use AI-powered insights and identity resolution to identify patterns in undecided shoppers' behaviors. Deliver personalized, timely promotions, such as exclusive discounts or limited-time shipping offers, to nudge these consumers toward greater engagement.

5. Build Trust Through Multi-Channel Integration
Incorporate cohesive multi-channel strategies that create seamless transitions between email, text, and onsite experiences. By integrating identity signals, brands can deliver a consistent and personalized journey that resonates across generations.

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Shop the same amount online	64%	61%	57%	52%	58%	60%	59%
Shop more online	28%	27%	32%	31%	26%	33%	29%
Shop less online	7%	12%	10%	15%	13%	7%	10%
I don't plan to shop online in the next 12 months	2%	0%	2%	1%	2%	0%	1%

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 underutilized opportunity with room for growth among exclusivity-seeking younger demographics.

Key Insights

Online Marketplaces Dominate Across Demographics

|	
MALE	56%
BOOMER	65%
GEN X	54%
GEN Z	46%
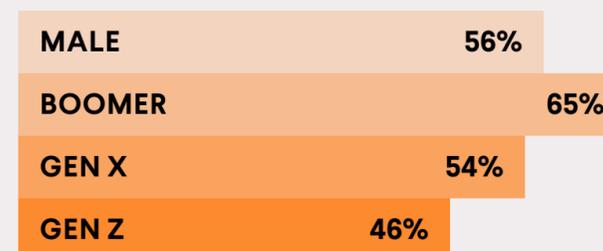
53%

Amazon, Temu and Rakuten et al capture 53% of total respondents, making them the top choice for all genders and age groups. This preference is particularly strong among male shoppers (56%), Boomers (65%), Gen X (54%), and Gen Z (46%)

Direct-to-Brand Channels Show Untapped Potential

7%

With only 7% of respondents planning to shop directly on brand websites or apps in 2025, brands face a clear opportunity to strengthen direct relationships. Strategies that emphasize exclusivity, personalization, and loyalty could help shift this dynamic

Retail Websites Appeal to Women and Younger Shoppers

FEMALE	40%
MILLENNIAL	49%
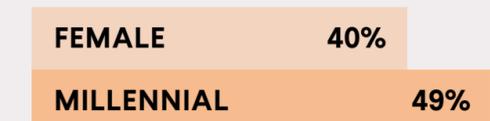
Large online retail platforms like Walmart and Target resonate with 40% of female respondents and nearly half of Millennials (49%). These platforms thrive on their broad product offerings, ease of use, and reputation for convenience.

Strategic Takeaways

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

2. Emphasize 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 personalized 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 personalized offers on brand websites and apps. Tailor content to reflect diverse preferences, particularly for female consumers who favor intuitive, value-driven digital interactions.

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
An online retail store (e.g. Walmart, Costco, Target, etc.)	25%	39%	49%	42%	40%	37%	39%
An online marketplace (e.g. Amazon, Temu, Rakuten, etc.)	65%	54%	43%	46%	49%	56%	53%
Directly on a brand's website	8%	4%	3%	8%	6%	4%	5%
Directly in a brand's app	1%	1%	2%	3%	2%	1%	2%

Most Trusted Places to Buy Online: Marketplaces Lead the Way

Marketplaces like Amazon and Temu remain the most trusted platforms for online shopping, valued for their reliability and convenience. These marketplaces are perceived to offer unparalleled product variety, ensuring that consumers can find nearly anything they're looking for, often in one place. This "one-stop-shop" experience eliminates the need for customers to browse multiple websites, saving time and effort. However, demographic differences in trust reveal opportunities for brands to refine their strategies, especially as younger shoppers increasingly favor direct-to-brand experiences.
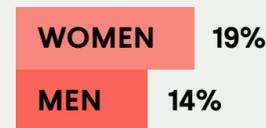
Key Insights

Marketplaces Dominate Across Demographics

|	
BOOMER	53%
WOMEN	46%
MEN	49%
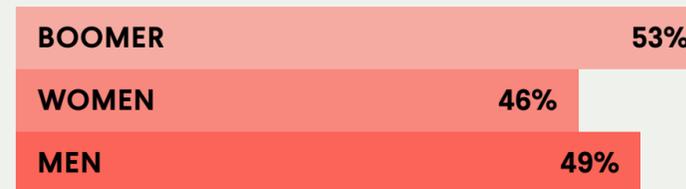
Online marketplaces are the most trusted across all age groups, with Boomers leading at 53%. Women closely align with this trend at 46%, while men surpass them slightly at 49%.

Gender Differences in Direct-to-Brand Trust

WOMEN	19%
MEN	14%

Women (19%) exhibit greater trust in direct brand websites compared to men (14%), highlighting an opportunity for brands to tailor messaging and experiences that enhance trust and loyalty among female shoppers

Younger Shoppers Favor Direct-to-Brand Experiences

GEN Z	30%
BOOMER	16%
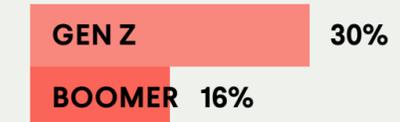
2x

Gen Z and Millennials are nearly twice as likely (30%) as Boomers (16%) to trust direct brand websites, reflecting their preference for exclusive, authentic, and personalized shopping experiences.

Retail Stores as Secondary Trust Anchors

MEN	34%

Gen X and Boomers show strong trust in online retail stores, with 34% of men citing these platforms as preferred. This highlights an enduring comfort with traditional retail experiences among older demographics.

Strategic Takeaways

1. Optimize Marketplace Presence for Trust and Discovery:

Strengthen your positioning on major marketplaces by leveraging competitive pricing, verified reviews, and strategic product placements.

2. Invest in Direct-to-Brand Messaging for Younger Audiences:

Build compelling direct-to-consumer campaigns that highlight brand authenticity, exclusive offerings, and sustainability. For Gen Z and Millennials, emphasize storytelling, behind-the-scenes content, and limited-edition product drops to appeal to their desire for unique and meaningful connections.

3. Appeal to Women with Personalized Trust-Building Strategies:

Develop campaigns for female shoppers that prioritize safety, community, and empowerment. Incorporate customer testimonials, loyalty rewards, and messaging that underscores product quality and reliability to deepen trust and encourage repeat purchases.

4. Reinforce Retailer Strategies for Older Demographics:

Maintain strong visibility on major online retail platforms where Gen X and Boomers feel most comfortable.

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
An online retail store (e.g. Walmart, Costco, Target, etc.)	24%	32%	38%	31%	29%	34%	32%
An online marketplace (e.g. Amazon, Temu, Rakuten, etc.)	53%	52%	44%	36%	46%	49%	48%
Directly on the brand's website (e.g. gap.com, nike.com, samsung.com, etc.)	16%	10%	15%	30%	19%	14%	16%
Directly in the brand's app	6%	6%	3%	3%	6%	3%	5%

What Matters Most When Buying Directly from Brands

Understanding why consumers choose to shop directly from brands reveals key drivers of trust, value, and convenience. These insights highlight demographic nuances, such as variations across gender and age, offering valuable guidance for brands to enhance direct-to-consumer engagement. When asked about the most important factor in buying directly from a brand, responses revealed several key priorities.

✿ Key Insights

Price Competitiveness Reigns Supreme

MEN	39%
WOMEN	30%
BOOMER	43%
GEN Z	24%
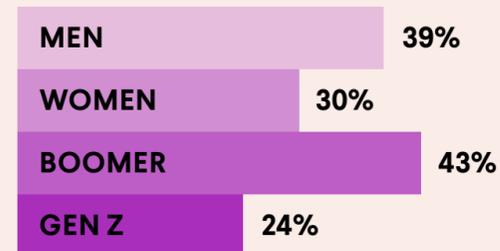
35% ▱

Price remains the top priority, with 35% of consumers favoring brands offering the best deals. Men (39%) are slightly more price-sensitive than women (30%), and Boomers (43%) lead as the most cost-conscious group. In contrast, only 24% of Gen Z shoppers emphasize price, indicating their focus lies elsewhere.

Reviews and Reputation Drive Decisions

GEN Z	16%
MILLENNIAL	11%

Gen Z shoppers (16%) are strongly influenced by product reviews, reflecting their reliance on peer validation. Millennials, on the other hand, prioritize brand name recognition (11%), emphasizing the role of reputation and trust in their purchasing decisions.

Shipping Incentives Are Essential

17% ▱

Free shipping is a crucial factor for 17% of consumers across all age groups. This highlights the importance of convenience and cost-savings in direct-to-brand shopping decisions.

Strategic Takeaways

1. Highlight Competitive Pricing Across Channels:
Emphasize pricing advantages in marketing campaigns, especially for price-sensitive demographics like Boomers and male shoppers. Use clear, value-driven messaging to reinforce your brand's affordability.

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

3. Leverage Social Proof to Build Trust:
Prioritize authentic reviews and user-generated content in campaigns to appeal to Gen Z. For Millennials, integrate storytelling and brand legacy into messaging to underscore reputation and build deeper connections.

4. Customize Messaging by Demographics:
Tailor campaigns to reflect demographic priorities. For younger audiences, emphasize 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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Best price	43%	37%	30%	24%	30%	39%	35%
Discount	7%	6%	6%	3%	6%	5%	6%
Popularity of item	2%	2%	4%	6%	3%	3%	3%
Reviews	8%	9%	8%	16%	10%	9%	10%
Brand name recognition	6%	8%	11%	7%	6%	10%	8%
Convenience	6%	10%	11%	18%	13%	8%	10%
Delivery time	5%	4%	10%	9%	9%	5%	7%
Free shipping	20%	20%	17%	9%	18%	16%	17%
Ability to pick up in store	2%	2%	4%	8%	3%	4%	4%

Motivators for Purchasing Directly from Brands Over Marketplaces

Direct-to-brand shopping allows brands to bypass marketplace competition and build stronger, personal connections with consumers. Gender-based differences in purchasing priorities—ranging from value and convenience to trust and personalization—highlight opportunities for brands to craft targeted strategies that drive direct sales and foster loyalty.

Key Insights

Pricing Is Paramount Across Genders

MALE	60%
FEMALE	60%

Better pricing is the top motivator for shopping directly from brands, cited by 60% of both male and female respondents.

Personalization Appeals More to Women

WOMEN	13%
MEN	9%

Women (13%) place greater value on a personalized shopping experience compared to men (9%), underscoring the importance of tailored engagement for female shoppers.

Faster Delivery Drives Convenience

MEN	17%
WOMEN	17%

Speedy delivery appeals equally to men and women, with 17% of respondents across genders identifying it as a key benefit of buying directly.

Strategic Takeaways

1. Leverage Competitive Pricing to Attract Shoppers
Highlight pricing advantages in direct-to-brand campaigns. 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 holidays and sales events.

3. Invest in Personalization for Women Shoppers
Use first-party data to craft tailored shopping experiences that resonate with female consumers. Offer curated recommendations, customizable options, and personalized rewards to strengthen engagement and loyalty.

4. Capitalize on Marketplace Pain Points
Emphasize 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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Better pricing or exclusive discounts	78%	60%	48%	48%	60%	60%	60%
Faster delivery options	12%	18%	19%	19%	17%	17%	17%
Better loyalty rewards	7%	12%	18%	11%	11%	14%	12%
A more personalized shopping experience	3%	10%	15%	22%	13%	9%	11%

Factors Influencing Online vs. In-Store Purchase Decisions

The choice between online and in-store shopping is influenced by a blend of convenience, price transparency, and product availability. While online channels dominate for ease and comparison shopping, in-store experiences remain attractive for tactile interactions and immediate access to products. To succeed, brands must seamlessly integrate their online and offline strategies to cater to these varied consumer preferences.
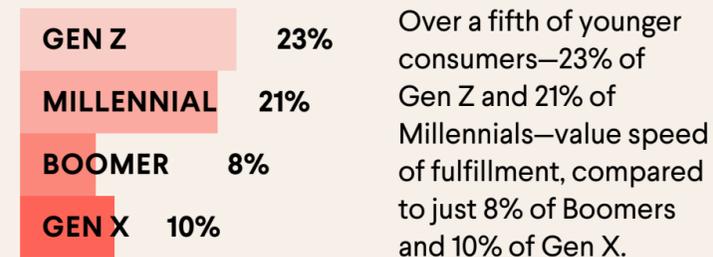
Key Insights
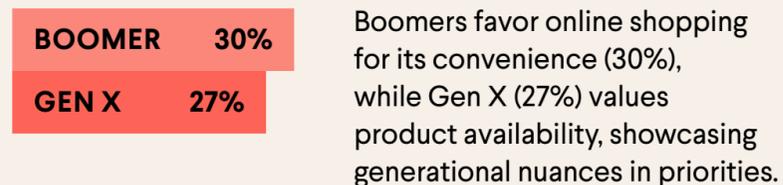
Price Transparency Drives Online Shopping

37%

Price comparisons are the leading factor for online shopping, cited by 37% of respondents, highlighting the importance of clarity and competitive pricing.

Speed is the Name of the Game

GEN Z	23%
MILLENNIAL	21%
BOOMER	8%
GEN X	10%

Over a fifth of younger consumers—23% of Gen Z and 21% of Millennials—value speed of fulfillment, compared to just 8% of Boomers and 10% of Gen X.

Convenience Resonates Differently Across Generations

BOOMER	30%
GEN X	27%

Boomers favor online shopping for its convenience (30%), while Gen X (27%) values product availability, showcasing generational nuances in priorities.

Strategic Takeaways

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

2. 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.

3. 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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Convenience	30%	22%	22%	21%	22%	26%	24%
Price comparisons	43%	41%	31%	30%	37%	37%	37%
Product availability	19%	27%	26%	26%	24%	24%	24%
Delivery speed	8%	10%	21%	23%	16%	13%	15%

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. DTC sales allow brands to bypass marketplace fees, build stronger relationships, and unlock richer insights through first-party data. However, to thrive in this competitive landscape, brands must prioritize elements that resonate most with shoppers—such as competitive pricing, detailed product descriptions, and visual aids like images and videos.

Key Insights

Detailed Product Descriptions Take the Lead

44%

Nearly half (44%) of consumers consider detailed product descriptions the most helpful factor when deciding on a purchase, underscoring the importance of clear and comprehensive information.

Generational Preferences for Video Content

Video reviews and product demos are particularly influential for younger audiences, including Millennials and Gen Z, while older generations rely more on traditional descriptions and static visuals

Visual Support Drives Engagement

31%

High-quality product images resonate strongly across all demographics, with 31% of respondents ranking them as essential to their decision-making process.

Strategic Takeaways

1. Prioritize 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 personalize 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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Detailed product descriptions	56%	49%	32%	33%	41%	47%	44%
Video reviews or product demos	15%	14%	21%	21%	19%	16%	18%
High-quality product images	27%	31%	31%	35%	31%	31%	31%
Styling or usage recommendations	1%	7%	15%	11%	10%	6%	8%

Preferred Content Types That Get Shoppers Back to Your Website

Compelling content plays a pivotal role in driving repeat visits to brand websites and apps. By helping consumers connect with products, trust brands, and find value in their interactions, the right content fosters engagement and loyalty. Across demographics, customer reviews, promotions, and practical guides stand out as key drivers for retaining audiences. Tailoring content strategies to the unique preferences of gender and age groups allows brands to deepen connections and maximize their reach.

Key Insights

Customer Reviews Are Universal Motivators

|	
MEN	43%
WOMEN	40%
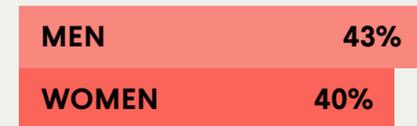
Reviews and testimonials are highly influential, with 43% of men and 40% of women identifying them as a primary reason for revisiting brand websites and apps. This preference extends across all age groups, cementing reviews as a universal engagement driver.

Women Favor Visual and Storytelling Content

WOMEN	11%
MEN	5%
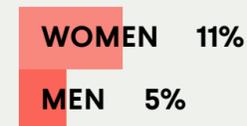
Beyond reviews, women are more inclined toward high-quality product images and behind-the-scenes brand stories. For example, 11% of women cite behind-the-scenes content as a motivator compared to just 5% of men.

Promotions and Exclusives Attract Younger Audiences

GEN Z	60%
MILLENNIAL	70%
BOOMER	76%
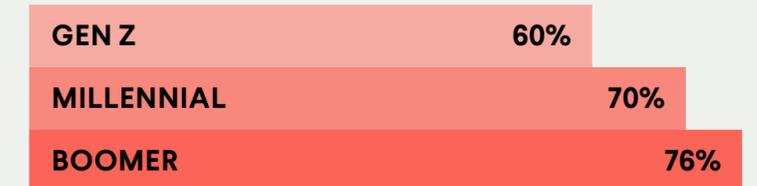
Upcoming sales and exclusive offers strongly appeal to Gen Z (60%) and Millennials (70%). Boomers (76%) also value promotional content, while loyalty-driven rewards resonate particularly with younger demographics.

Millennials Value Practical Guides

15%

Practical content, such as product guides or how-to tips, resonates most with Millennials, with 15% of respondents overall ranking this type of content as a key reason to visit brand websites

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

3. Incorporate Storytelling Elements for Women
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 All Consumers
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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Product guides or how-to tips	9%	14%	20%	16%	12%	18%	15%
Behind-the-scenes brand stories	2%	6%	14%	11%	5%	11%	8%
Customer reviews or testimonials	41%	39%	46%	39%	40%	43%	42%
Upcoming sales or promotions	76%	70%	49%	60%	65%	63%	64%
Actions offering me loyalty points or rewards	52%	49%	41%	48%	47%	47%	47%

Barriers to Completing Online Purchases: Shipping Costs and Trust Issues

Consumers abandon online purchases when perceived value fails to outweigh the hurdles they face. High shipping fees, lack of trust, and complicated checkout processes are top deterrents that impact shoppers across demographics. Addressing these barriers with transparency, efficiency, and reliability can not only boost conversions but also foster long-term loyalty.

Key Insights

Shipping Fees Dominate

BOOMER	**51%**
GEN X	**51%**

High shipping costs are the leading reason for cart abandonment, cited by 44% of shoppers. Boomers and Gen X are particularly affected, with 51% identifying this as their top deterrent.

Complexity and Trust Issues Drive Hesitation

Among younger shoppers, complicated checkout processes (16%) and trust issues (15%) are significant factors contributing to purchase hesitation, emphasizing the importance of a seamless and secure shopping experience.

Stock Issues Kill Opportunity

20%

Inventory availability is the second most common barrier, frustrating shoppers of all ages and genders. Approximately 20% of respondents cite out-of-stock items as the biggest blocker to completing purchases.

Strategic Takeaways

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

2. 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.

3. 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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
High shipping costs	51%	51%	37%	29%	47%	40%	44%
Lack of trust in the brand	10%	12%	15%	27%	13%	16%	15%
Complicated checkout process	17%	14%	16%	16%	15%	16%	16%
Items out of stock	22%	19%	21%	18%	18%	23%	20%
Not enough payment options	0%	4%	11%	10%	7%	4%	6%

Motivating Consumers to Opt-In for Brand Communications

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 maximize 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

56%

Free shipping is the leading motivator, with 56% of respondents prioritizing it.

61%

Women are particularly responsive, with 61% citing this as their key reason to opt-in.

Younger Consumers Value Exclusivity

EARLY ACCESS	34%
EXCLUSIVE CONTENT	30%

Gen Z is drawn to early access (34%) and exclusive content (30%), highlighting their desire for unique and personalized brand interactions.

Loyalty Points Offer Broad Appeal

48%

Nearly half of respondents (48%) favor loyalty points as an incentive, reflecting consistent interest across all demographic groups.

VIP Services Fail to Impress

9%

Only 9% of respondents consider VIP services, such as extended warranties, important, though men show slightly higher interest in these offerings.

Strategic Takeaways

1. Personalize Offers

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

2. Reward Loyalty

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

3. Appeal to Younger Shoppers with Exclusive Perks

Design campaigns for Gen Z 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.

4. 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.

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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
One time discount	30%	27%	26%	25%	27%	28%	27%
Free shipping	69%	62%	44%	47%	61%	51%	56%
Loyalty points later used for rewards	52%	48%	48%	38%	47%	48%	48%
Exclusive access to content	7%	16%	22%	24%	14%	20%	17%
Early access to their new products	17%	24%	25%	30%	21%	25%	23%
VIP warranty service	6%	9%	11%	12%	7%	11%	9%

Where Consumers Discover Deals and Promotions Online

The channels consumers use to find promotions reveal generational and gender-based preferences, emphasizing the importance of omnichannel strategies. While websites and email campaigns remain critical for older shoppers, social media and influencer-driven content resonate strongly with younger audiences. These insights present opportunities for brands to fine-tune their marketing efforts to align with demographic trends and behaviors.

Key Insights

Social Media Drives Engagement Among Younger Generations

GEN Z	37%
MILLENNIAL	38%

Social media ads are key for Gen Z (37%) and Millennials (38%). Additionally, Gen Z frequently relies on organic social media feeds (34%) for discovering promotions, highlighting their preference for less curated, community-driven content.

Friends and Family Recommendations Play a Crucial Role

28%

Trusted recommendations remain a vital channel for deal discovery, with 28% of respondents across genders valuing input from friends and family, making it the third most popular method.

Gender Differences in Social and Email Channels

MEN	34%
WOMEN	22%

Men are more likely to engage with social media ads (34%) compared to women (22%), whereas email is more appealing to female shoppers (37% vs. 27% for males), suggesting nuanced gender preferences in promotional strategies.

Websites and Emails Dominate but Skew Older

37%

Brand websites lead as the most popular channel for discovering deals (37%), while email campaigns strongly resonate with Boomers and Gen X, who prefer these direct and controlled communication formats.

Strategic Takeaways

1. Tailor Content by Demographics
Prioritize 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 male shoppers, while leveraging email for personalized and relationship-driven communication with female audiences.

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

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Text	15%	12%	8%	15%	15%	9%	12%
Email	42%	29%	29%	25%	37%	27%	32%
Search	16%	15%	13%	12%	10%	18%	14%
Brand's own website	41%	41%	29%	37%	32%	42%	37%
Brand's own app	8%	15%	19%	15%	14%	14%	14%
Brand's social media feed (Instagram, TikTok, Facebook, etc.)	10%	30%	32%	34%	25%	26%	25%
Brand's social media advertisements (Instagram, TikTok, Facebook, etc.)	17%	24%	38%	37%	22%	34%	28%
Influencer content	2%	4%	8%	10%	5%	5%	5%
In-store promotions	21%	22%	22%	18%	23%	19%	21%
TV ads	20%	22%	11%	15%	16%	19%	17%
Direct mail	19%	11%	10%	11%	14%	12%	13%
Friends or family recommendations	28%	28%	31%	24%	27%	30%	28%

Final Purchase Decisions: Marketplaces vs. Direct Channels

Where consumers choose to complete their purchases offers valuable insights into their trust and convenience preferences. Online marketplaces like Amazon and Temu dominate for non-grocery purchases, favored for their ease of use and comprehensive product offerings. However, a growing number of younger shoppers are gravitating toward direct-to-brand websites, seeking unique experiences and personalized connections.

✻ Key Insights

Third-Party Sites Lead

BOOMER	49%

Online marketplaces remain the most popular choice, with 47% of respondents completing most of their purchases on third-party platforms. Boomers lead this trend, with 49% favoring these channels for their reliability and convenience.

Social Has a Footprint

GEN Z	10%

Just 4% of consumers shop on social channels, but this rises to 10% among Gen Z.

Direct-to-Brand Channels Are Gaining Momentum

Direct-to-brand websites are increasingly preferred by Gen Z and Millennials, who value exclusivity, authenticity, and personalized shopping experiences. Overall, 34% of respondents select this channel for finalizing purchases.

Strategic Takeaways

1. Strengthen Marketplace Strategies
Optimize 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 personalized 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, personalized 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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Directly from the brand's website or app	33%	32%	34%	36%	36%	31%	34%
Third-party websites (Amazon, Temu, Ebay, etc.)	49%	48%	47%	38%	43%	50%	47%
On social media	1%	4%	6%	10%	4%	4%	4%
In-store	17%	16%	13%	16%	16%	14%	15%

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

The channels consumers prefer for communication reveal their comfort with certain platforms and the frequency of their online interactions. Email continues to dominate as the trusted favorite 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

BOOMER	59%
MILLENNIAL	33%
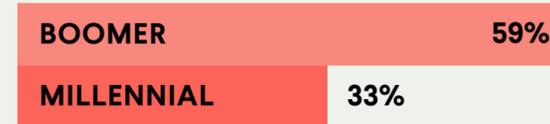
40% ✉

Email is the preferred channel for 40% of respondents, with Boomers leading at 59%. Millennials also favor email, though at a lower rate of 33%, reflecting their mix of preferences across platforms.
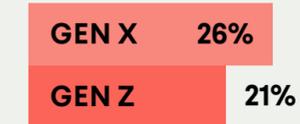
Mobile Messaging Gains Appeal

GEN X	26%
GEN Z	21%

Text resonates with Gen X (26%) and Gen Z (21%), who also show a preference for image-based MMS content, distinguishing them from other age groups.

Push Notifications Are on the Rise

MILLENNIAL	16%

11% 🔔

Push notifications are appreciated by 11% of respondents, with Millennials leading at 16%, indicating growing acceptance of this channel for real-time updates and offers.

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, personalized email campaigns targeting all demographics.

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

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

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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Send an email	59%	38%	33%	20%	39%	41%	40%
Send a short text-only message to my mobile phone (SMS)	17%	26%	17%	21%	21%	18%	20%
Send a text message with imagery or video to my mobile phone (MMS)	14%	20%	11%	24%	17%	16%	16%
Send a push notification via their app I downloaded	5%	9%	16%	18%	12%	10%	11%
Target me with an ad placed on social media or a website that is not the brand's website	5%	8%	22%	18%	11%	15%	13%

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 personalized 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 behaviors, 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 | 52% |
| DISCOUNTS | 50% |

Financial incentives are the most influential, with 52% of consumers citing price drops on previously viewed items and 50% identifying discounts as top motivators.

Low-Stock Warnings Drive Action
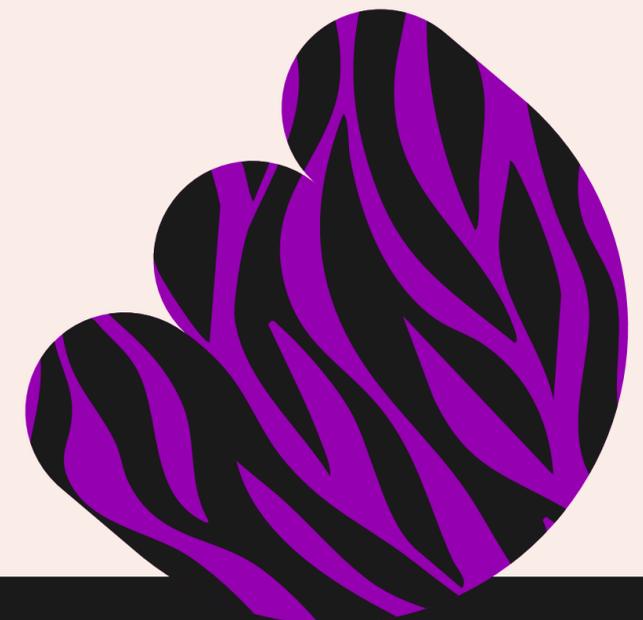
| MILLENNIAL | 18% |

16%

Low-stock alerts move 16% of consumers, with women (18%) showing a stronger preference for this urgency-driven tactic.

Back-in-Stock Notifications Resonate

| MILLENNIAL | 28% |
| BOOMER | 25% |

Alerts about back-in-stock items appeal most to Millennials (28%) and Boomers (25%), 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

Gender-Based Preferences Highlight Functional Appeal

ABANDONED CART REMINDERS   18%

LOW-STOCK ALERTS   14%

Men favor abandoned cart reminders (18%) and low-stock alerts (14%), while women slightly prefer back-in-stock notifications (22%).

Loyalty Programs Appeal to Older Shoppers

BOOMER   46%

Nearly half of Boomers (46%) find offers tied to rewards programs motivating, emphasizing their appreciation for long-term value. Loyalty incentives resonate with 38% of the general audience.

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. Emphasize Urgency for Younger Shoppers
Craft targeted campaigns with low-stock and back-in-stock notifications for Millennials and Gen Z to drive faster conversions.

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. Personalize Engagement by Gender
Use cart reminders and low-stock alerts for male shoppers, while tailoring back-in-stock and similar-item notifications for women to align with their preferences.

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?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Price drop offer on a single item I viewed	57%	57%	46%	45%	53%	51%	52%
General brand sale across many items	29%	28%	31%	18%	25%	31%	28%
Discount codes	61%	57%	39%	41%	52%	49%	50%
Reminders for items I left in my cart	16%	14%	18%	15%	14%	18%	16%
Loyalty program offers	46%	39%	34%	31%	39%	37%	38%
Notice that an item I viewed online is back in stock	25%	19%	28%	28%	22%	28%	25%
Notice that an item I viewed online is low in stock	7%	13%	22%	28%	18%	14%	16%
New items that are similar to what I viewed previously	15%	24%	21%	38%	22%	23%	22%

Key Insights

How Triggered Messaging Based on Behavior Influences Purchase

Behavior-driven messaging is a powerful tool for influencing consumer purchase decisions. When personalized, 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.

Generational Preferences Highlight Personalization's Impact

MILLENNIAL	**38%**
GEN Z	**33%**

Millennials (38%) and Gen Z (33%) are the most responsive to personalized messages, underscoring the importance of tailored outreach for younger, digitally savvy audience

Behavior-Driven Messaging Is Highly Influential

83%

Overall, 83% of respondents are likely to purchase when brands send messages about recently viewed products.

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 behavior-driven messages. Pair this with transparent pricing or promotions to convert interest into action.

4. Optimize 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?

| RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Very likely	8%	26%	38%	33%	24%	26%	25%
Somewhat likely	74%	60%	53%	59%	63%	60%	62%
Not likely	18%	14%	9%	9%	13%	13%	13%

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

Consumer Sentiment on AI Personalization in Shopping

AI-driven personalization is transforming eCommerce, offering tailored experiences that enhance convenience and relevance. While many 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 personalized recommendations and dynamic pricing. Brands that strike the right balance between personalization and transparency are well-positioned to thrive in this evolving landscape.

Key Insights

Growing Enthusiasm for AI Personalization

MILLENNIAL	60%
GEN Z	52%
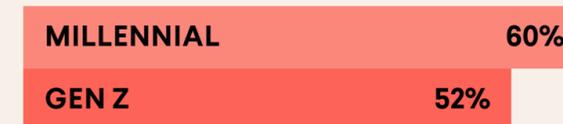
40%

Overall, 40% of respondents embrace AI-driven personalization. Millennials lead the charge at 60%, closely followed by Gen Z at 52%.

Skepticism Among Boomers

26% {?}

In contrast, 26% of Boomers express discomfort with AI-driven personalization, highlighting the importance of transparent data practices to build trust with this group.

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 Personalization
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 PERSONALIZED PRODUCT AND SERVICE RECOMMENDATIONS FOR YOU. HOW DO YOU FEEL ABOUT THIS?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
I love it, bring it on	15%	37%	60%	52%	33%	47%	40%
I'm not sure yet	59%	47%	28%	35%	45%	41%	43%
I don't feel comfortable with this	26%	15%	12%	12%	22%	12%	17%

Key Drivers of Online Loyalty: Free Shipping, Personalization, 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 personalized 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

47%

Nearly half of respondents (47%) cite free or fast shipping as the top factor for increasing loyalty. Boomers prioritize this benefit the most, with 56% highlighting its importance.

Younger Shoppers Crave Personalization

| GEN Z | 27% |
| MILLENNIAL | 22% |

Gen Z (27%) and Millennials (22%) prioritize personalized recommendations and loyalty rewards, emphasizing the importance of tailored engagement for these groups.

Customer Service Remains Vital

26%

Excellent customer service continues to play a crucial role, with 26% of consumers valuing this aspect of their shopping experience.

Strategic Takeaways

1. Emphasize Speed and Value
Offer tiered loyalty programs with free or expedited shipping as a core benefit.

2. Create Personal Touchpoints
Use AI to deliver tailored recommendations and exclusive perks for younger shoppers.

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

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Faster or free delivery	56%	52%	40%	38%	50%	44%	47%
A seamless and intuitive website/app experience	7%	17%	16%	16%	14%	14%	14%
Excellent customer service	34%	24%	22%	20%	22%	29%	26%
Personalized shopping recommendations	3%	7%	22%	27%	14%	13%	13%

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, personalization, or seamless shopping experiences, 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 enduring preference for marketplaces as trusted platforms. At the same time, there is a clear appetite for direct-to-brand interactions, driven by a desire for exclusivity, personalization, and value.

Shipping costs remain a significant barrier for U.S. consumers, emphasizing the need for free or affordable delivery options. Loyalty, meanwhile, hinges on tailored experiences, exceptional service, and tangible incentives. AI-powered personalization 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 personalized 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 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 personalized 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 behavioral targeting for personalized 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 personalized engagement, boost revenue, and enhance customer loyalty. By utilizing 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-personalized one-to-one messages. Brands lean on the Wunderkind Identity Network, a proprietary database recognizing 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.