# Wunderkind

# 2026 Consumer Insights Report

## APAC

# Executive Summary

As Australia moves into 2026, brands are operating in an environment defined less by disruption than by sustained pressure. Cost-of-living concerns remain front of mind for consumers, shaped by persistent inflation, elevated interest rates, and ongoing uncertainty around economic growth. While Australia has avoided the sharp shocks seen in other global markets, household confidence remains fragile, and purchasing behaviour continues to reflect heightened scrutiny, value sensitivity, and deliberate decision-making.

At the same time, political and regulatory dynamics are contributing to a more complex operating landscape for marketers. Continued focus on data privacy, evolving consent expectations, and scrutiny of digital platforms are reshaping how brands acquire, engage, and retain customers. These pressures are compounded by rising competition and costs across paid media channels, making attention harder to buy and loyalty harder to earn.

Against this backdrop, Australian consumers are not retreating from digital commerce, but they are raising the bar. Online shopping is firmly embedded across generations, yet frequency, channel choice, and engagement are increasingly selective. Consumers expect convenience and personalisation as a baseline, but they are far less tolerant of friction, irrelevance, or excess messaging. Value is no longer just about price; it is about effort saved, confidence gained, and control maintained.

This year's Australia Consumer Insights Report reveals a clear and consistent pattern: growth now comes from relevance, not reach. Consumers reward brands that recognise them, remember context, and respond to real behaviour, but only when that recognition feels permission-based and transparent. Identity-driven experiences are welcomed when they reduce repetition and create continuity across devices and channels, and rejected when they feel intrusive or automated for automation's sake.
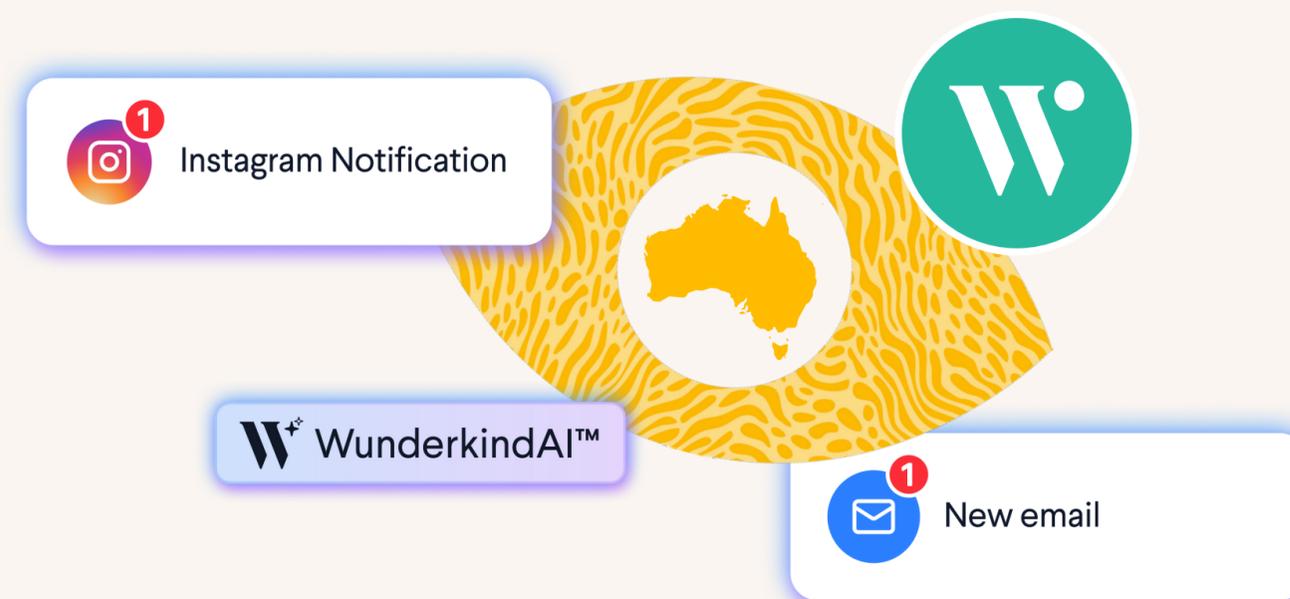
AI plays a central role in this evolution. Australian consumers, particularly younger cohorts, are open to AI-powered personalisation when it clearly improves relevance, timing, and usefulness. However, enthusiasm is conditional. Messages that are poorly timed, overly frequent, or insufficiently explained erode trust quickly. The expectation is not more AI, but better decisioning, using intelligence to suppress noise as much as to deliver opportunity.

Importantly, the report highlights the enduring power of owned channels. Email, text, onsite experiences, and alerts remain the most trusted and effective ways to engage consumers, precisely because they are opt-in and controllable. Their success depends on orchestration—ensuring that messages are triggered by intent, aligned across touchpoints, and restrained once value has been delivered. Paid channels continue to play a role, but increasingly as complements rather than engines of growth.

For Australian brands, the implication is strategic. Winning in 2026 will require a shift from campaign-led thinking to relationship-led execution. The brands that outperform will be those that treat attention as a finite resource, use identity to create continuity, apply AI to improve relevance, and practise restraint as a competitive advantage.

In a market defined by caution rather than contraction, sustainable growth will belong to brands that respect consumer expectations, earn permission through value, and turn everyday interactions into long-term relationships.

# TL;DR: 10 Quick Insights from Our 2026 Consumer Data | APAC 🇦🇺

1. **Mobile Is the Baseline, Not the Advantage**
   Smartphones are ubiquitous, used regularly by 96% of consumers, with universal adoption among Millennials (100%). Desktops (76%) signal high-intent research, while tablets (47%) bridge casual and considered browsing, showing consumers fluidly switch devices based on context, intent, and purchase complexity.

2. **Online Shopping Is Habitual for Younger Generations**
   Around half of Millennials (54%) and Gen Z (46%) shop online 2–3 times per week, reinforcing digital commerce as a routine behaviour rather than an occasional activity. Leveraging loyalty programs and truly personalised triggered offers can help sustain these habits.

3. **Trust Still Lives With the Familiar**
   Consumers place the most trust in online retailers like Coles and Woolworths (26%) and directly on a brand's website (25%), especially older shoppers. Younger consumers show growing trust in brand-owned apps when experiences feel clear, consistent, and secure. Emerging destinations still face a trust gap.

4. **Relevance and Urgency Drive Conversion**
   Onsite experiences that surface price drops (54%), availability signals (26%), and personalised recommendations (32%) are most likely to convert browsing into buying. Shoppers respond to timely, relevant cues that reduce effort and uncertainty, while generic experiences rarely move purchase intent.

5. **Friction Kills Conversion at the Finish Line**
   Unexpected shipping costs (35%), stock issues (17%), and trust gaps (11%) are the primary reasons shoppers abandon purchases late in the journey. Conversion losses are often preventable when brands reduce friction, clarify value, and reinforce confidence at checkout.

6. **Opt-In Is Won With Tangible Value and Control**
   Consumers opt into brand emails and texts when the value is immediate and clear, led by free shipping (41%) and loyalty rewards (34%), while younger shoppers are drawn to exclusive and early access, with trust strengthened by frequency control.

7. **Email Leads and Mobile Follows for Re-Engagement, but Paid Retargeting it Out**
   Email (43%) remains the preferred way for brands to re-engage shoppers after browsing, especially among older consumers. SMS (16%) has a prominent footprint, with MMS emerging (11%), with younger shoppers particularly receptive when outreach is timely, relevant, and permission-based. Paid retargeting is the least popular medium at just 10%.

8. **Ads Are Accepted When They're Relevant, Restrained, and Controlled**
   Consumers tolerate cross-channel ads from brands they've opted into when messaging feels coordinated, relevant, and limited. Ad sentiment improves most when shoppers see fewer, more relevant ads and are given clear control over frequency, categories, and opt-out options, making restraint and agency more powerful than explanation alone.

9. **AI Is In, but When Control Comes First**
   Consumers are open to AI-driven personalisation when they can control frequency, timing, and topics (29%), with one-fifth (19%) stating they "love it." One- quarter (25%) are unsure, with reticence (19%) the joint least chosen answer. Younger shoppers show enthusiasm, while older consumers remain cautious, making transparency, restraint, and clear value essential to building trust.

10. **Identity Works When It Feels Like Memory, Not Tracking**
    Consumers love cross-device recognition (16%), especially when it's permissioned (55%), controllable, and clearly improves continuity. Younger shoppers embrace it, while trust depends on giving all consumers visibility and control over how identity is used.

# Methodology

In partnership with MX8 Labs, Wunderkind conducted the 2026 Consumer Insights Report, focusing on consumers in Australia. Building on prior years' findings, this report examines the latest shifts shaping online purchasing behaviour across Australia.

This year's research explores Australian consumers' shopping plans for 2026, key drivers influencing purchase decisions, and preferred channels for receiving offers and messaging. It also examines motivations for opting into brand communications, attitudes toward AI-powered experiences, and the value exchanges that encourage repeat purchasing. The report pairs detailed consumer insights with strategic takeaways designed to support digital strategists, marketers, and decision-makers in navigating an increasingly complex commerce landscape.

While this report centers on consumers in Australia, additional insights into U.S. and UK trends are available in our content hub.

## Wunderkind X MX8 LABS

## 324

Insights are drawn from a representative sample of 324 Australian consumers, reflecting diversity across gender, ethnicity, age, and household income. Data collection was completed 12–19 December 2025.

# Which Devices Consumers Own and Use Regularly

**Device Choice Reflects Context and Confidence, Not Novelty**

Mobile is firmly established as the baseline device for Australian consumers, with near-universal smartphone usage across every age group and gender. This makes mobile performance a prerequisite for participation in digital commerce, not a source of differentiation. Any friction in mobile experiences directly limits reach and conversion.

However, mobile dominance does not eliminate the role of other devices. Desktop usage remains high, particularly among Boomers, Millennials, and men, signaling its importance for more deliberate, research-driven purchases. Tablets play a complementary role, supporting relaxed browsing and mid-consideration moments.

Overall, Australian shoppers move fluidly between devices based on intent and confidence, reinforcing the need for mobile-first execution supported by desktop depth and cross-device continuity.

## Key Insights

### Mobile is the Baseline

| | |
|---|---|
| MILLENNIAL | 100% |
| GEN X | 97% |
| GEN Z | 96% |
| BOOMER | 94% |

# 96%

Smartphone usage is effectively universal across Australian consumers, with Millennials reaching full saturation. This confirms that mobile performance is table stakes, not a competitive advantage, and that any breakdown in mobile usability impacts nearly the entire addressable audience.

### Tablets Play a Supporting Role

| | |
|---|---|
| MILLENNIAL | 51% |
| MEN | 49% |
| GEN X | 47% |
| BOOMER | 46% |

# 47%

Tablet usage is most pronounced among Millennials, Gen X and men (49% vs. 40% of women), reinforcing its role as a secondary device that bridges casual mobile browsing and more deliberate desktop engagement.

### Desktop Usage Signals Consideration

| | |
|---|---|
| BOOMER | 83% |
| MEN | 81% |
| MILLENNIAL | 90% |

# 76%

The older the consumer, the more they lean to desktop. Men (81% vs. 70% of women) and Boomers over-index, suggesting that larger screens are still preferred for research-heavy, confidence-driven purchases.

## Strategic Takeaways

**1. Build Mobile Experiences That Close the Sale**
Invest in fast, intuitive mobile journeys designed to convert, not just browse. Streamlined checkout, clear value cues, and reduced friction are critical to turning high mobile traffic into completed purchases.

**2. Preserve Desktop Depth for Confidence-Building Moments**
Maintain robust desktop experiences that support research, comparison, and reassurance, particularly for older consumers and men who continue to rely on larger screens for decision-making.

**3. Plan for Cross-Device Journeys, Not Single Sessions**
Ensure shoppers can move seamlessly between devices without losing context. Identity-driven recognition should preserve carts, preferences, and messaging so momentum is maintained as shoppers shift screens throughout the buying process across sessions and environments.

**1** WHICH OF THE FOLLOWING DEVICES DO YOU OWN AND USE REGULARLY (AT LEAST 4 TIMES A WEEK)?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| A personal desktop computer/laptop | 83% | 66% | 80% | 79% | 70% | 81% | 76% |
| A smartphone | 94% | 97% | 100% | 96% | 97% | 96% | 96% |
| A tablet | 46% | 47% | 51% | 41% | 44% | 49% | 47% |

# How Often Do Consumers Shop Online?

**Shopping Frequency Reflects Habit and Intent**

Online shopping frequency increasingly reflects habit rather than access, particularly among younger consumers. Millennials and Gen Z shop online most often, signaling that digital purchasing is embedded into routine behaviour rather than reserved for planned occasions. However, frequency meaningfully tapers with age.

Older Australians continue to shop online regularly, but with a more deliberate cadence, suggesting needs-based purchasing rather than habitual browsing. Gender differences are present but modest, pointing to broad normalisation of online shopping across the population.

Together, these patterns indicate a mature digital commerce environment where growth depends less on driving adoption and more on aligning relevance, cadence, and confidence with differing shopping rhythms.

## Key Insights

**Gender Differences Are Narrow but Directional**

Men shop online slightly more frequently than women when it comes to weekly shopping (49% vs. 36% of women), but when it comes to regular monthly purchases, women edge men (34% vs. 27%). The narrow gap suggests online shopping is now broadly habitual across genders.
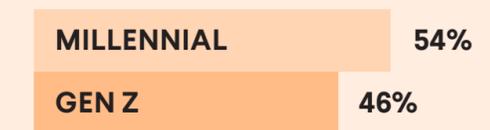
**Older Shoppers Are More Deliberate**

| | |
|---|---|
| BOOMERS | 50% |
| GEN X | 29% |
| GEN Z | 23% |
| MILLENNIAL | 22% |
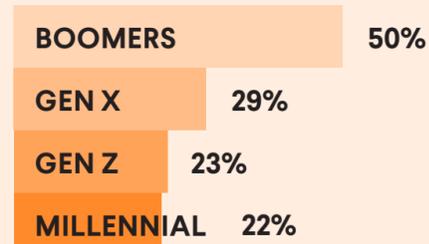
# 32%

Half of Boomers shop online only every few months, well above the national average. This lower frequency signals planned, needs-based purchasing, with greater emphasis on trust, clarity, and value at the moment of decision.

**Younger Shoppers Drive Frequency**

| | |
|---|---|
| MILLENNIAL | 54% |
| GEN Z | 46% |

# 38%

Millennials and Gen Z are the most frequent online shoppers, with nearly half shopping two to three times per week. This reinforces online shopping as a routine behaviour shaped by convenience, mobile access, and always-on retail expectations.

## Strategic Takeaways

**1. Reinforce Habitual Shopping Without Increasing Noise**
Lean into automation, triggered messaging, and timely reminders to support frequent shoppers. Personalised offers, replenishment cues, and price-drop alerts help sustain momentum without increasing perceived noise.

**2. Reduce Friction for Deliberate, Lower-Frequency Shoppers**
For lower-frequency shoppers, focus on clarity, reassurance, and value. Streamlined journeys, strong product information, and confidence signals help convert planned visits into completed purchases.

**3. Match Messaging Cadence to Shopping Rhythm**
Australian consumers demonstrate clear differences in shopping frequency by age. Brands should calibrate communication cadence accordingly, higher-touch, behaviour-driven messaging for frequent shoppers, and more restrained, confidence-building outreach for deliberate buyers.

**4. Use Value and Convenience as Universal Anchors**
While frequency varies, value and convenience matter across all segments. Messaging that reinforces ease, efficiency, and tangible benefits will resonate broadly, helping brands remain relevant regardless of how often consumers choose to shop.

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| 2-3 times a week | 19% | 39% | 54% | 46% | 36% | 40% | 38% |
| 5-6 times a month | 31% | 32% | 23% | 33% | 34% | 27% | 30% |
| Every few months | 50% | 29% | 22% | 23% | 31% | 33% | 32% |

# 2026 Online Shopping Plans

### Growth Will Be Incremental, Not Transformational

Consumers enter 2026 with largely settled online shopping behaviours. Most plan to maintain their current level of online purchasing, signaling that eCommerce is firmly normalised rather than expanding rapidly. Growth, where it exists, is concentrated among younger generations who continue to increase reliance on digital channels.

At the same time, a meaningful minority anticipates shopping more online, suggesting upside remains, but it is selective, not universal. Gender differences are modest, pointing to broad-based stability rather than structural divergence.

Overall, the data indicates that future gains will be earned through relevance, experience, and retention, not through driving net-new adoption or fundamental behaviour change.

## Key Insights

### Stability Is the Baseline

| | |
|---|---|
| BOOMER | 70% |
| MEN | 52% |
| GEN X | 49% |
| WOMEN | 48% |
| GEN Z | 43% |
| MILLENNIAL | 34% |
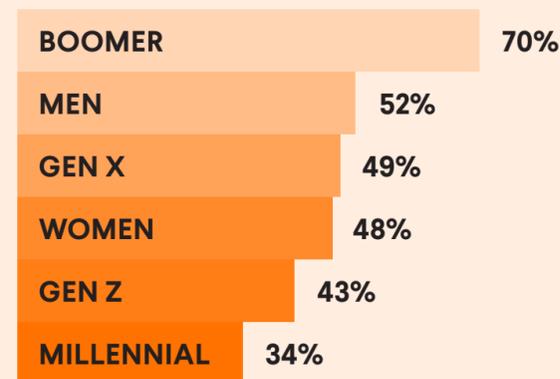
# 50%

Half of consumers (50%) plan to shop online about the same amount in 2026, with older cohorts especially anchored in consistency. This reinforces that online shopping is now habitual, with limited expectation of dramatic change.

### Younger Consumers Signal the Clearest Growth

| | |
|---|---|
| MILLENNIAL | 55% |
| GEN Z | 43% |
| GEN X | 38% |
| BOOMER | 17% |
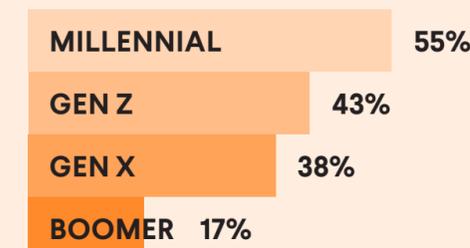
# 37%

Gen Z and Millennials are the most likely to increase online shopping, reinforcing their role as the primary drivers of incremental growth rather than net-new adoption.

### A Small Group Signals Pullback

# 12%

A minority of consumers plan to shop less online in 2026, consistently across age groups and gender. This pullback suggests sensitivity to economic pressure and value perception rather than disengagement from digital commerce itself.

## ⚲ Strategic Takeaways

**1. Convert Stability Into Incremental Growth With Identity**
Growth will come from recognising existing shoppers and nudging slightly higher frequency. Identity-driven continuity allows brands to remember preferences, preserve context, and reinforce momentum without relying on broad acquisition or increased spend.

**2. Prioritise Younger Audiences With AI-Driven Relevance**
AI-powered decisioning can dynamically optimise timing, channel, and message relevance for these segments, translating higher stated intent into realised increases in engagement and purchasing.

**3. Use Orchestration to Earn, Not Force, Increased Spend**
As growth intent is selective, brands must avoid over-messaging. Orchestrated journeys that adapt based on real behaviour ensure outreach feels earned and timely, particularly for shoppers signaling openness to doing more, without alienating the stable majority.

**4. Protect the Core While Addressing Value Sensitivity**
The small group planning to shop less online reflects pressure, not disengagement. Clear value cues, restraint, and confidence-building experiences help retain this segment, reinforcing trust and protecting long-term lifetime value during periods of heightened selectivity.

**3** WHEN THINKING ABOUT THE AMOUNT OF ONLINE SHOPPING YOU DID IN 2025, WHICH BEST DESCRIBES YOUR PLANS FOR ONLINE SHOPPING IN 2026?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| I don't plan to shop online in the next 12 months | 0% | 1% | 0% | 1% | 0% | 1% | 1% |
| Shop less online | 12% | 11% | 11% | 13% | 13% | 10% | 12% |
| Shop more online | 17% | 38% | 55% | 43% | 39% | 36% | 37% |
| Shop the same amount online | 70% | 49% | 34% | 43% | 48% | 52% | 50% |

# Where Consumers Plan to Spend Online

## Marketplaces Lead, but Channel Choice Is Fragmenting

Online marketplaces remain the single largest planned purchase destination for consumers, driven by convenience, familiarity, and breadth of choice. Direct brand channels, both websites and apps, collectively represent a meaningful share, particularly among younger consumers who show greater comfort engaging brands directly. Large online retail stores continue to serve as a trusted middle ground, balancing convenience with perceived reliability. Emerging channels such as social commerce and AI-assisted purchasing remain small but visible among Gen Z.

Overall, the data points to a multi-channel future where volume concentrates in marketplaces, but growth opportunities increasingly sit within owned brand environments.

## Key Insights

### Marketplaces Anchor Volume

| | |
|---|---|
| BOOMER | 52% |
| MILLENNIAL | 50% |
| MEN | 46% |
| WOMEN | 42% |
| GEN X | 39% |
| GEN Z | 36% |
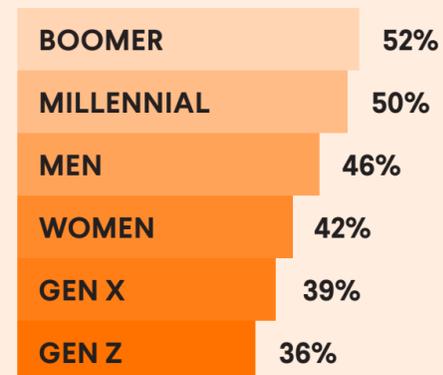
# 44%

Online marketplaces are the most common planned destination overall, particularly among Boomers and Millennials. This reflects continued reliance on scale, familiarity, and efficiency when prioritising where most purchases will occur.

### Direct-to-Brand Skews Younger

| | |
|---|---|
| MILLENNIAL | 26% |
| FEMALE | 22% |
| GEN Z | 20% |
| GEN X | 18% |
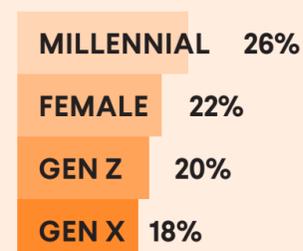
# 21% (directly on a brand's website or app)

Younger consumers are more generally more likely to plan most purchases directly through brand-owned channels. This signals growing comfort with direct relationships when brands can justify the shift with value, experience, and recognition.

### Retailers Act as a Stable Middle Ground

| | |
|---|---|
| GEN Z | 33% |
| WOMEN | 31% |
| MILLENNIAL | 27% |
| MEN | 26% |
| BOOMER | 25% |
| GEN Z | 24% |
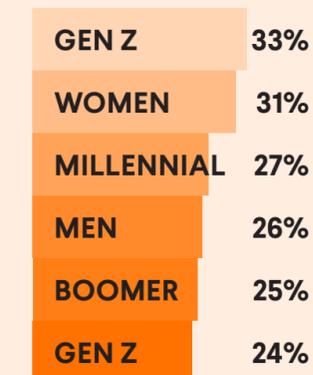
# 19%

Large online retailers like Coles and Woolworths attract a consistent share of shoppers across segments, with Gen X and women slightly over-indexing. This channel balances marketplace convenience with brand familiarity and perceived accountability.

### Emerging Channels Are Small but Generationally Distinct

| | |
|---|---|
| AI TOOLS | 1% |
| SOCIAL MEDIA | 3% |

# 1-3%

Social commerce and AI-assisted purchasing remain niche overall, with zero footprint among Boomers, but Gen Z adoption signals early experimentation. These channels reflect curiosity rather than scale, suggesting future potential rather than near-term volume.

## Strategic Takeaways

**1. Treat Marketplaces as Scale, Not Ownership**

Brands should continue to leverage these environments for reach and acquisition, while intentionally creating pathways into owned channels where identity, recognition, and lifetime value can be built.

**2. Use Identity to Strengthen Direct Relationships With Younger Shoppers**

Identity-driven recognition across sessions and devices helps brands deliver continuity, reduce friction, and reinforce the value of engaging in brand-owned environments.

**3. Apply AI to Justify the Shift to Direct**

Direct-to-brand growth depends on delivering clear incremental value. AI-powered personalisation, relevant recommendations, and adaptive messaging help brands compete with marketplace convenience by making owned experiences feel more useful, not more promotional.

**4. Orchestrate Channel Choice, Don't Force It**

Australian consumers naturally move between marketplaces, retailers, and brand-owned channels. Orchestration across email, text, and onsite experiences ensures messaging supports where shoppers already choose to buy, while nudging them toward higher-value channels at the right moment.

**4** 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 |
| At an online marketplace (e.g. Amazon, Temu, Rakuten, etc.) | 52% | 39% | 50% | 36% | 42% | 46% | 44% |
| At an online retail store (e.g. Woolworths, Coles, Kmart, etc.) | 25% | 33% | 27% | 24% | 31% | 26% | 28% |
| Directly in a brand's app | 7% | 8% | 7% | 14% | 10% | 7% | 8% |
| Directly on a brand's website | 11% | 14% | 13% | 12% | 13% | 13% | 13% |
| Other | 5% | 0% | 0% | 1% | 1% | 2% | 2% |
| Social Media (e.g. Instagram, Facebook) | 0% | 4% | 1% | 11% | 2% | 5% | 3% |
| Within AI tool (e.g. ChatGPT Instant Checkout) | 0% | 3% | 0% | 1% | 1% | 1% | 1% |

# Reason for Favored Purchase Destinations

**Convenience and Value Lead, but Relevance Differentiates**

Consumers choose where to shop online primarily based on ease and efficiency, reinforcing convenience as the baseline expectation across channels. However, convenience alone does not fully explain channel preference. Younger consumers apply additional criteria, including relevance, personalisation, and loyalty recognition, when deciding where to buy.

Older shoppers remain more anchored in familiarity and simplicity, while faster support and relevant recommendations play a larger role for younger audiences, signaling a shift from purely transactional decision-making toward experiences that feel adaptive.

Overall, channel choice reflects a layered value exchange: convenience opens the door, but relevance and recognition determine preference.

## Key Insights

**Convenience Is the Primary Driver For All**

| | |
|---|---|
| BOOMER | 69% |
| GEN X | 64% |
| MILLENNIAL | 62% |
| GEN Z | 41% |
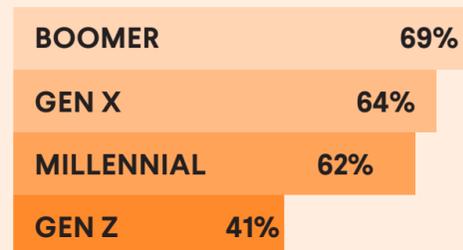
# 62%

Convenience is the leading reason consumers choose their primary purchase channel. Older consumers, in particular, prioritise ease and familiarity, reinforcing that friction reduction remains essential to winning and retaining demand.

**Value Reinforces Channel Preference but Generationally Distinct**

| | |
|---|---|
| WOMEN | 56% |
| MEN | 51% |
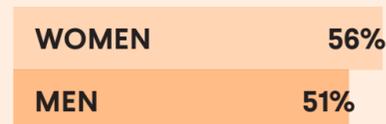
# 53%

Better offers or discounts play a significant role in channel choice, especially among Millennials and women. This highlights continued value sensitivity, even as online shopping becomes habitual rather than occasional.

**Younger Shoppers Expect Recognition**

| | |
|---|---|
| GEN Z | 28% |
| GEN X | 23% |
| MILLENNIAL | 18% |
| BOOMERS | 14% |
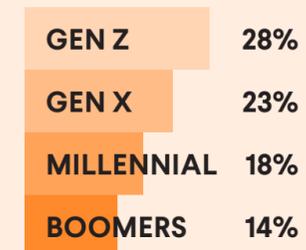
# 20%

Younger consumers place greater emphasis on loyalty recognition and feeling known (double that of older cohorts). This signals that repeat engagement increasingly depends on acknowledgment and reward.

**Personalisation Skews Gen Z**

| | |
|---|---|
| GEN Z | 35% |
| AVERAGE | 19% |

# 1-3%

Gen Z over-indexes truly-personalised recommendations, highlighting expectations for tailored experiences as part of the purchase decision.

## ⚹ Strategic Takeaways

**1. Make Convenience the Baseline, Not the Message**
Convenience is assumed and no longer differentiates channels. Brands must ensure frictionless journeys everywhere, then compete beyond ease by layering relevance, recognition, and confidence-building signals that give shoppers a reason to prefer one destination over another.

**2. Use Identity to Turn Recognition Into Preference**
Identity-driven continuity across sessions and devices allows brands to reward familiarity, reinforce loyalty, and make repeat engagement feel acknowledged rather than transactional.

**3. Apply AI to Deliver Relevance at Decision Moments**
AI-powered recommendations and adaptive messaging help brands surface the right products, offers, or support cues in real-time, reducing effort and increasing confidence at the point of purchase.

**4. Orchestrate Support and Messaging With Restraint**
While faster support matters most to younger shoppers, over-communication risks undermining trust. Orchestration across onsite, email, and text ensures assistance and follow-up are timely, contextual, and limited to moments of genuine need.

**5** FOLLOWING ON FROM THE PREVIOUS QUESTION, WHY WILL YOU PLAN TO BUY FROM THESE PURCHASE DESTINATIONS?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Better brand offers or discounts | 50% | 56% | 62% | 41% | 56% | 51% | 53% |
| Better loyalty recognition | 14% | 23% | 18% | 28% | 23% | 18% | 20% |
| Convenience | 69% | 64% | 62% | 41% | 61% | 62% | 62% |
| Faster support | 7% | 5% | 7% | 24% | 9% | 9% | 9% |
| More relevant recommendations | 12% | 18% | 21% | 35% | 19% | 20% | 19% |
| None of these | 7% | 1% | 2% | 0% | 2% | 4% | 3% |

# Most Trusted Places to Buy Online

**Trust Is Distributed, Not Concentrated**

Trust in online purchasing among consumers is spread across multiple destinations rather than dominated by a single channel. While marketplaces and large online retailers continue to benefit from familiarity and perceived safeguards, brand-owned websites and apps command comparable trust overall.

Notably, trust skews meaningfully by age. Older consumers lean toward established, traditional environments, while younger Australians increasingly trust brand-owned channels and emerging platforms when experiences feel secure, transparent, and consistent. Social commerce and AI-enabled purchasing remain niche but show early signs of legitimacy among Gen Z.

Together, these patterns suggest that trust is no longer inherited from scale alone, it is earned through clarity, reliability, and experience.

## ᗜᗜ Key Insights

### Retailers Are Marginally the Most Trusted Destination

| | |
|---|---|
| MILLENNIAL | 30% |
| BOOMER | 28% |
| GEN X | 24% |
| GEN Z | 21% |
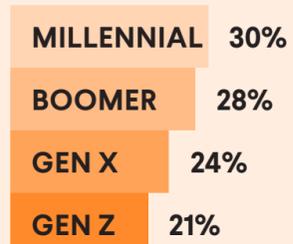
# 26%

Retailers pip direct channels as the most trusted purchase destination overall, with relative parity among age demographics. These big-box stores like Kmart and Woolworths benefit from brand recognition and perceived accountability without the perceived complexity of navigating individual brand sites.

### Brand-Owned Websites a Close Second

| | |
|---|---|
| WEBSITE | 25% |
| APP | 15% |

Brand websites slightly edge out all destinations. For websites, this trust skews older, and for apps it leans younger, reflecting confidence in direct relationships when brands deliver security, familiarity, and consistent experiences.

### Marketplaces Command Broad Trust From Older Consumers

| | |
|---|---|
| BOOMER | 29% |
| GEN X | 23% |
| MILLENNIAL | 18% |
| GEN Z | 8% |
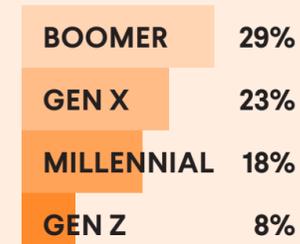
# 21%

Marketplaces are heavily trusted by Boomers, who index 4x that of Gen X, who value familiarity, buyer protections, and predictable outcomes when shopping online.

### Emerging Destinations Face a Trust Gap

| | |
|---|---|
| SOCIAL MEDIA | 8% |
| AI TOOLS | 3% |

Social and AI-enabled purchasing remain significantly less trusted, particularly among older consumers where their footprint is nonexistent. Adoption will depend on stronger assurances around security, clarity, and control before scaling.

## ⚔ Strategic Takeaways

### 1. Use Identity to Earn Trust Through Recognition, Not Reach

Trust is no longer concentrated in a single channel. Identity-driven recognition allows brands to build trust directly by remembering shoppers across sessions and devices, reinforcing familiarity and confidence without relying on marketplace scale.

### 3. Orchestrate Consistency Across Channels to Reinforce Credibility

As consumers move between marketplaces, retailers, and brand-owned environments, trust depends on consistency. Orchestration across onsite, email, and text ensures experiences feel connected, predictable, and reliable, regardless of where the purchase occurs.

### 2. Make Trust Visible at High-Intent Moments With AI

AI-driven decisioning can surface the right trust signals, security cues, reassurance, and relevant information, precisely when shoppers are most likely to hesitate. This is especially critical for younger consumers who are open to direct and emerging channels but remain selective.

### 4. Treat Emerging Channels as Trust-Building Environments, Not Scale Plays

Social and AI-enabled commerce should be approached deliberately. Controlled experimentation, transparency, and clear value exchanges allow brands to build early trust with Gen Z without jeopardising credibility among more cautious audiences.pushing for broader adoption or scale.

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

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| An online marketplace (e.g. Amazon, Temu, Rakuten, etc.) | 29% | 23% | 18% | 8% | 19% | 24% | 21% |
| An online retail store (e.g. Woolworths, Coles, Kmart, etc.) | 28% | 24% | 30% | 21% | 27% | 24% | 26% |
| Directly in the brand's app | 8% | 15% | 16% | 24% | 15% | 14% | 15% |
| Directly on the brand's website (e.g. bonds.com.au, nike.com.au, samsung.com/au, etc.) | 30% | 26% | 23% | 19% | 26% | 25% | 25% |
| None of these | 4% | 1% | 1% | 3% | 1% | 3% | 2% |
| Social Media (e.g. Instagram, Facebook) | 0% | 9% | 10% | 15% | 9% | 6% | 8% |
| Within AI tool (e.g. ChatGPT Instant Checkout) | 0% | 3% | 2% | 9% | 3% | 3% | 3% |

# Reasons for Trusted Purchase Destinations

## Trust Is Built Through Security, Recognition, and Relevance

Trust in online purchasing is anchored first in safety, but it is increasingly reinforced through experience. Secure payment remains the baseline requirement across all demographics, particularly for older shoppers who prioritise risk reduction. However, security alone is no longer sufficient to sustain trust.

Younger Australians place greater emphasis on recognition, relevance, and continuity across devices. Reviews continue to play a critical role in validating decisions, especially for women and younger cohorts navigating choice and uncertainty. Together, these signals suggest that trust is not purely institutional, it is experiential, shaped by how consistently a destination recognises, reassures, and respects the shopper.

## Key Insights

### Security Remains the Foundation of Trust

| | |
|---|---|
| BOOMER | 71% |
| GEN X | 71% |
| GEN Z | 56% |
| MILLENNIAL | 55% |
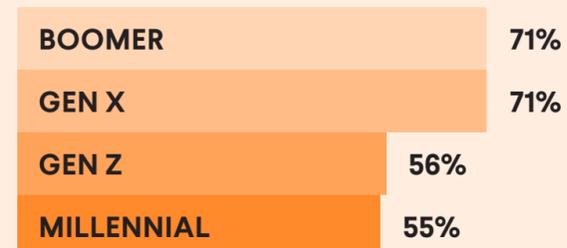
# 66%

Safe payment and strong security protections are the most important trust drivers overall. Older Australians over-index strongly, reinforcing that visible reassurance remains essential to building confidence at the moment of purchase.
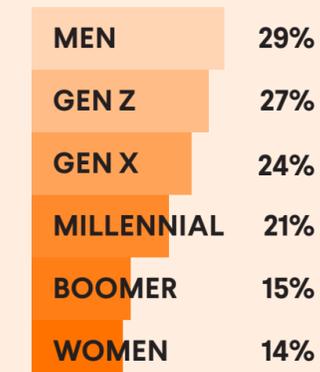
### Reviews Validate Purchase Decisions

| | |
|---|---|
| FEMALE | 39% |
| MALE | 23% |

# 30%

Customer reviews remain a critical trust signal, especially for younger consumers and women, helping shoppers reduce uncertainty and confirm purchase decisions.

### Recognition Across Devices Builds Confidence

| | |
|---|---|
| MEN | 29% |
| GEN Z | 27% |
| GEN X | 24% |
| MILLENNIAL | 21% |
| BOOMER | 15% |
| WOMEN | 14% |

# 22%

Younger consumers and men (2x that of women) are more likely to trust destinations that consistently recognise them across devices. This reflects rising expectations for continuity and experiences that feel remembered rather than repetitive

### Fewer Irrelevant Messages Build Authority

| | |
|---|---|
| GEN X | 19% |
| MILLENNIAL | 10% |

# 16%

Reducing irrelevant messages builds trust, particularly among older consumers, where relevance signals respect and restraint rather than over-communication. Delivering timely, triggered messages, such as reminders for items left behind keeps outreach useful, contextual, and aligned with shopper intent while interest remains high.

## ⚘ Strategic Takeaways

**1. Treat Security as Table Stakes, Not a Differentiator**
Safe payment and strong security protections are table stakes, particularly for older cohorts. Brands must make security visible and consistent, then compete beyond it by delivering experiences that feel confident, clear, and respectful of shopper expectations.

**2. Use Identity to Make Trust Feel Like Recognition, Not Tracking**
Younger consumers increasingly associate trust with being recognised across devices. Identity-driven continuity allows brands to reduce repetition, preserve context, and create experiences that feel remembered, reinforcing trust without over-collection or intrusion.

**3. Apply AI to Reduce Noise and Increase Relevance**
Trust is strengthened when messaging feels timely and relevant. AI-driven decisioning helps suppress unnecessary outreach while surfacing the right message at the right moment, particularly for shoppers who equate restraint with credibility.

**4. Orchestrate Reviews, Control, and Transparency at High-Intent Moments**
Reviews, preference control, and relevance cues should be surfaced when confidence is most fragile. Orchestrated onsite and offsite experiences ensure these trust signals appear contextually, supporting decision-making without overwhelming the shopper.

I TRUST BUYING THESE PURCHASE DESTINATIONS BECAUSE

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Consistently recognises me across devices | 15% | 24% | 21% | 27% | 14% | 29% | 22% |
| Control over preferences | 19% | 15% | 21% | 21% | 13% | 23% | 18% |
| Fewer irrelevant messages | 16% | 19% | 10% | 13% | 14% | 17% | 16% |
| None of these | 12% | 5% | 9% | 0% | 9% | 5% | 7% |
| Reviews from previous customers | 21% | 32% | 33% | 40% | 39% | 23% | 30% |
| Safe payment / good security | 72% | 71% | 55% | 56% | 66% | 65% | 66% |
| Transparency on data use | 13% | 11% | 21% | 15% | 13% | 15% | 14% |

# Motivators for Purchasing Directly from Brands Over Marketplaces

**Direct-to-Brand Requires a Clear Value Exchange**

Convincing consumers to shift purchases away from marketplaces and into brand-owned environments requires more than availability. Price remains the strongest lever, but it is no longer sufficient on its own. Faster delivery, loyalty rewards, and personalised experiences increasingly shape willingness to buy direct, particularly among younger shoppers.

At the same time, expectations around relevance and control are rising. Gen Z, in particular, responds to personalised messaging and the ability to manage communication preferences. Together, these signals indicate that direct-to-brand success depends on clearly articulating incremental value, combining economic incentives with recognition, relevance, and respect for the shopper's time and attention.

## ◠◠ Key Insights

**Unfortunately, Price is the Primary Driver**

| | |
|---|---|
| BOOMER | 67% |
| MILLENNIAL | 67% |
| GEN X | 63% |
| GEN Z | 52% |
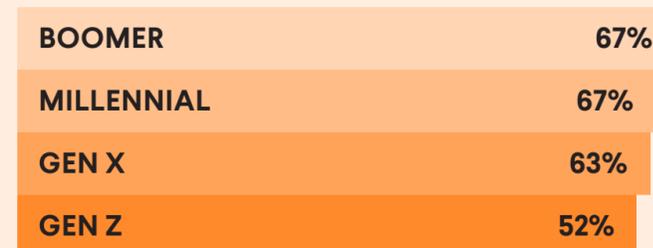
# 63%

Better pricing or exclusive discounts are the strongest motivators for shopping direct. This reinforces that even loyal shoppers require clear financial justification when choosing brand-owned channels over marketplaces.
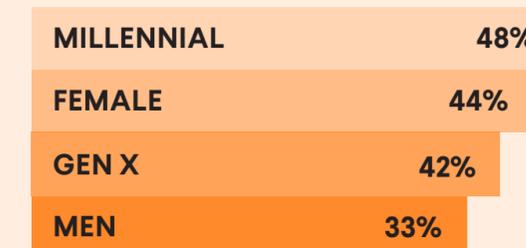
**Personalisation Tips the Scale**

| | |
|---|---|
| GEN Z | 38% |
| GEN X | 24% |
| MILLENNIAL | 22% |
| BOOMER | 11% |

# 22%

Younger consumers (3.5x that of Boomers) are significantly more motivated by bespoke shopping experiences and relevant messages, highlighting personalisation as a key lever for direct-to-consumer growth.
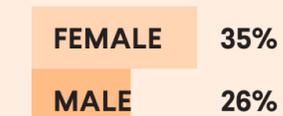
**Speed is the Name of the Game**

| | |
|---|---|
| MILLENNIAL | 48% |
| FEMALE | 44% |
| GEN X | 42% |
| MEN | 33% |

# 38%

Faster delivery options meaningfully increase willingness to buy direct, particularly among women and Millennials. Competing with marketplace speed remains critical to shifting purchase behaviour.

**Loyalty Rewards Strengthen Direct Appeal**

| | |
|---|---|
| FEMALE | 35% |
| MALE | 26% |

# 31%

Loyalty rewards play a significant role in motivating direct purchases, especially among women and Gen X. This highlights the importance of visible, tangible recognition in reinforcing direct relationships.

## ↗ Strategic Takeaways

**1. Lead With Clear Economic Value, Then Layer Relevance**
Price remains the primary trigger for choosing brand-owned channels. Brands should make savings explicit at high-intent moments, then reinforce that value with relevance and recognition to prevent direct experiences from feeling interchangeable with marketplaces.

**2. Compete on Speed Where It Matters**
Invest in faster delivery and clear fulfillment timelines for high-intent shoppers to reduce marketplace advantage and reinforce brand-owned destinations as equally convenient purchase options.

**3. Use Identity to Reward Direct Relationships**
Loyalty and repeat engagement are strengthened when shoppers feel recognised. Identity-driven continuity across sessions and devices allows brands to surface loyalty rewards, remembered preferences, and tailored incentives that justify buying direct without relying solely on discounts.

**4. Apply AI to Compete on Personalisation**
Personalised experiences are critical differentiators, particularly for younger Australians. AI-driven decisioning enables brands to dynamically optimise timing, messaging, and recommendations, helping owned channels match marketplace convenience while feeling more relevant.

**5. Orchestrate Control and Restraint to Build Confidence**
Gen Z's responsiveness to personalisation is paired with a desire for control. Orchestrated experiences across onsite, email, and text should respect preference settings and quiet hours, ensuring direct engagement feels intentional, helpful, and trustworthy rather than intrusive.
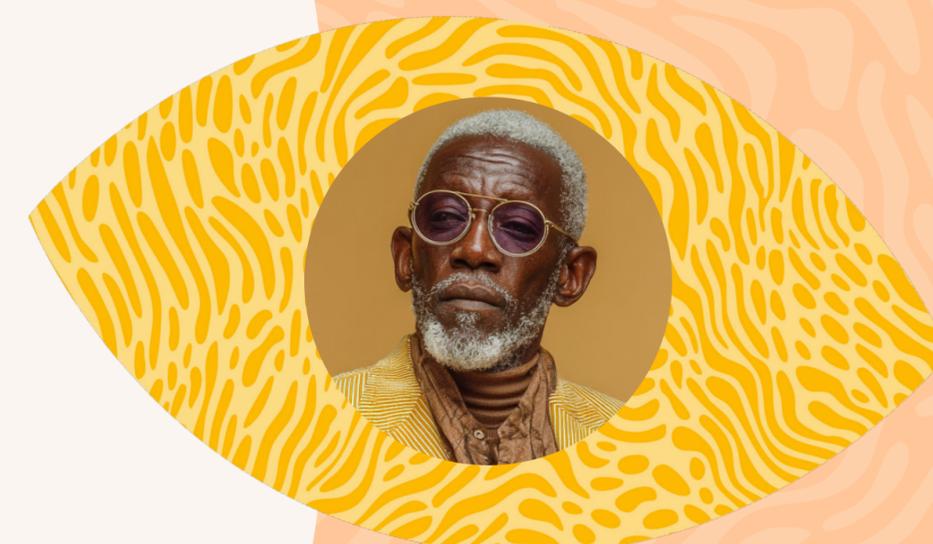
**8** WHAT WOULD ENCOURAGE YOU TO SHOP DIRECTLY
FROM A BRAND'S WEBSITE INSTEAD OF A MARKETPLACE?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| A more personalised shopping experience | 21% | 18% | 32% | 36% | 21% | 27% | 24% |
| Better loyalty rewards | 28% | 34% | 32% | 24% | 35% | 26% | 31% |
| Better pricing or exclusive discounts | 67% | 63% | 67% | 52% | 63% | 64% | 63% |
| Faster delivery options | 34% | 42% | 48% | 22% | 44% | 33% | 38% |
| Let me set message frequency/quiet hours. | 1% | 4% | 9% | 14% | 5% | 7% | 6% |
| More relevant, personalised messages based on what I browsed | 11% | 24% | 22% | 38% | 17% | 26% | 22% |
| None of these | 15% | 4% | 3% | 1% | 8% | 5% | 6% |

# Factors Influencing Brand Purchase Decisions

**Reassurance and Value Outweigh Inspiration**

When Australians choose to purchase directly from a brand, their decisions are driven more by reassurance than discovery. Familiarity with the brand remains the strongest influence, signalling that prior experience significantly lowers perceived risk when bypassing marketplaces. Price and shipping incentives further reinforce this confidence, underscoring the importance of tangible value in direct-to-brand decisions.

Younger consumers introduce additional considerations, including reviews and advertising, reflecting a greater need for validation even within brand-owned environments. Overall, direct purchasing reflects a pragmatic mindset: Australians buy direct when brands reduce uncertainty, reward loyalty, and clearly justify the decision through value and credibility.

## Key Insights

### Familiar Brands Win

| | |
|---|---|
| GEN Z | 52% |
| BOOMER | 48% |
| GEN Z | 33% |
| MILLENNIAL | 32% |
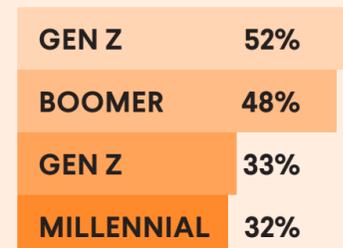
# 44%

Prior experience with a brand is the most influential factor when purchasing direct. This highlights the role of trust and familiarity in reducing friction and perceived risk outside of marketplace environments.
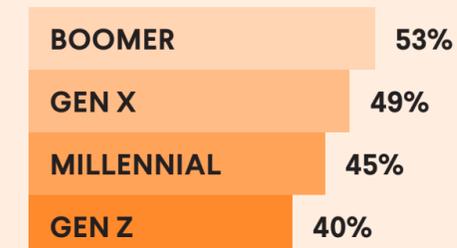
### Shipping Deals Have Broad Appeal

| | |
|---|---|
| WOMEN | 38% |
| MAN | 33% |

# 36%

Favourable shipping offers remain critical to direct conversion. Even familiar brands must clearly reward shoppers economically to justify buying direct rather than defaulting to marketplaces.

### Price Remains a Gatekeeper

| | |
|---|---|
| BOOMER | 53% |
| GEN X | 49% |
| MILLENNIAL | 45% |
| GEN Z | 40% |

# 48%

Low price remains a key consideration across demographics, the older, the more important. This reinforces that even loyal shoppers expect clear economic justification for buying direct.

### Advertising Influences Discovery

| | |
|---|---|
| GEN Z | 18% |
| BOOMER | 0% |

# 8%

Advertising plays a larger role for Gen Z, suggesting that discovery and brand signaling still matter even in direct-to-brand environments.

## Strategic Takeaways

**1. Prioritise Retention as a Growth Lever**

Focus on converting first-time buyers into repeat customers. Familiarity significantly increases willingness to purchase directly and reduces reliance on incentives or marketplace-driven purchasing behaviours.

**2. Use Identity to Turn Familiarity Into a Conversion Advantage**

Prior experience is the strongest driver of direct purchases.Identity-driven recognition allows brands to immediately signal familiarity, remembering shoppers, surfacing past interactions, and reducing friction, so direct environments feel safe, confident, and easy to choose.

**3. Apply AI to Reinforce Value at the Moment of Decision**

Price and shipping remain non-negotiable gatekeepers. AI-driven decisioning can dynamically surface the most relevant offers, incentives, or reassurance cues in real-time, ensuring value is clear without defaulting to constant, broad-based discounting.

**4. Use Advertising to Support, Not Replace, Trust**

Deploy advertising to build awareness and credibility, especially for Gen Z, but ensure landing experiences reinforce trust through consistency, transparency, and clear value once shoppers engage directly.

**9** WHEN PURCHASING ONLINE DIRECTLY FROM A BRAND (NOT FROM RETAILERS OR ON A MARKETPLACE), WHICH OF THESE ANSWERS FACTOR INTO YOUR DECISION?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| I prefer to purchase from brands I have shopped with in the past | 48% | 52% | 32% | 33% | 46% | 42% | 44% |
| I prefer to purchase from brands that have the best advertisements | 0% | 9% | 11% | 18% | 7% | 9% | 8% |
| I prefer to purchase from brands that have the best reviews | 19% | 23% | 51% | 40% | 33% | 28% | 30% |
| I prefer to purchase from brands that offer the best shipping deals | 39% | 33% | 40% | 32% | 38% | 33% | 36% |
| I prefer to purchase from brands that offer the lowest price | 53% | 49% | 45% | 40% | 50% | 46% | 48% |
| None of these | 5% | 1% | 0% | 3% | 0% | 5% | 2% |
| Other (Please specify) | 3% | 0% | 4% | 0% | 0% | 3% | 1% |

# What Matters Most When Purchasing Directly from Brands

**Practical Value Outweighs Brand Affinity**

When Australians purchase directly from a brand, decisions are driven primarily by practical considerations rather than emotional or aspirational factors. Price, free shipping, and convenience clearly outweigh brand recognition or popularity, reinforcing that direct channels are evaluated through a cost–benefit lens.

While younger consumers introduce additional priorities, such as delivery speed, reviews, and product popularity, these too are rooted in utility and reassurance rather than brand storytelling alone. Older shoppers remain more price-and shipping-sensitive, signalling heightened scrutiny at checkout.

Overall, success in direct-to-brand environments depends on reducing effort, minimising cost friction, and reinforcing confidence. Brands are expected to earn the direct purchase through tangible benefits, not rely on name recognition to close the sale.
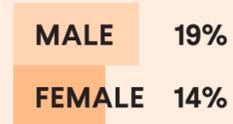
## Key Insights

**Price Sets the Decision Floor**

| | |
|---|---|
| BOOMER | 35% |
| MEN | 31% |
| GEN X | 29% |
| GEN Z | 29% |
| WOMEN | 26% |
| MILLENNIAL | 22% |
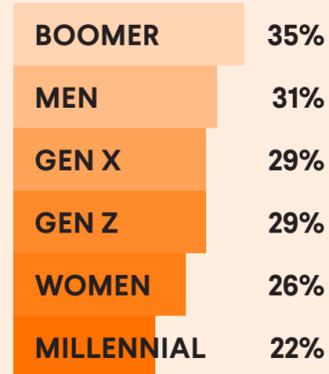
# 29%

Best price is the single most important factor when purchasing directly from a brand, particularly for older consumers and men. This reinforces that economic value remains the primary gatekeeper, even in trusted brand relationships.
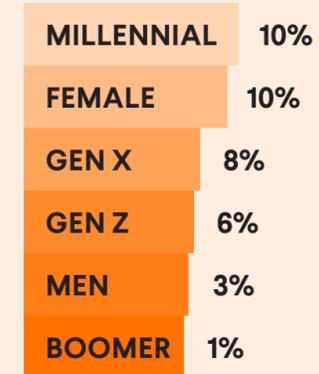
**Social Proof Gains Importance With Youth and Women**

| | |
|---|---|
| MILLENNIAL | 10% |
| FEMALE | 10% |
| GEN X | 8% |
| GEN Z | 6% |
| MEN | 3% |
| BOOMER | 1% |

# 7%

Younger Australians place greater importance on validation cues such as reviews and popularity. These factors support confidence and immediacy rather than emotional attachment to the brand.

**Convenience Matters Across All Segments**

| | |
|---|---|
| MALE | 19% |
| FEMALE | 14% |

# 17%

Convenience continues to play a significant role in direct purchases, reinforcing expectations for simple navigation, streamlined checkout, and low-friction experiences regardless of age or gender.

**Free Shipping Is a Top Driver**

# 17%

Free shipping is the second most important factor overall, with cross-generational appeal underscoring the outsized role of shipping costs in direct purchase decision

## Strategic Takeaways

**1. Treat Shipping as a Conversion Lever**

Use free or reduced shipping strategically to eliminate a major barrier to direct purchase, particularly for older and value-conscious shoppers who closely evaluate total cost at the moment of decision.

**2. Compete on Clear, Transparent Pricing**

Ensure pricing is easy to understand, competitive, and clearly justified versus marketplaces, reinforcing trust and reducing hesitation when consumers compare direct brand purchases against alternative buying options.

**3. Optimise Delivery Expectations for Younger Audiences**

Emphasize delivery speed and communicate fulfillment timelines clearly to meet younger shoppers' expectations shaped by fast, on-demand commerce and marketplace-driven standards.

**4. Reinforce Confidence for Younger Shoppers Without Over-Branding**

Younger Australians value speed and validation over brand prestige. Brands should surface delivery timelines, reviews, and popularity cues contextually, allowing confidence to drive conversion without over-reliance on brand storytelling at the point of purchase.

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 |
| Ability to pick up in store | 3% | 13% | 6% | 8% | 11% | 6% | 8% |
| Best Price | 35% | 29% | 22% | 29% | 26% | 31% | 29% |
| Brand name recognition | 5% | 4% | 4% | 10% | 4% | 6% | 5% |
| Convenience | 18% | 18% | 17% | 12% | 14% | 19% | 17% |
| Delivery time | 6% | 7% | 15% | 4% | 9% | 7% | 8% |
| Discount | 6% | 4% | 10% | 7% | 6% | 6% | 6% |
| Free Shipping | 24% | 15% | 14% | 15% | 17% | 17% | 17% |
| None of these | 1% | 1% | 0% | 1% | 0% | 2% | 1% |
| Other (Please specify) | 1% | 0% | 1% | 0% | 0% | 1% | 1% |
| Popularity of item | 0% | 1% | 1% | 5% | 3% | 0% | 1% |
| Reviews | 1% | 8% | 10% | 6% | 10% | 3% | 7% |

# Factors Influencing Online vs. In-Store Purchase Decisions

## Online Wins When It Removes Practical Friction

Consumers choose to buy directly from brands online when digital channels clearly outperform physical stores on ease, cost, and access. Free shipping and convenience are the most influential drivers overall, reinforcing that online purchases are evaluated through a practical, efficiency-led lens.

However, motivations vary meaningfully by age. Older consumers are more sensitive to cost-related factors, while younger shoppers respond to access, flexibility, and reassurance mechanisms such as easy returns and flexible payment options.

The data suggests that online channels win not by replicating the in-store experience, but by removing friction and offering tangible advantages that physical retail cannot easily match.

### Free Shipping Is the Strongest Online Advantage

| | |
|---|---|
| BOOMER | 59% |
| FEMALE | 50% |
| GEN X | 39% |
| MALE | 36% |
| MILLENNIAL | 33% |
| GEN Z | 32% |
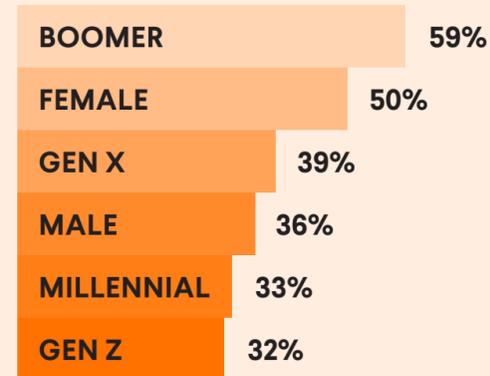
# 42%

Free shipping is the most influential factor driving online purchases over in-store, especially among older consumers and women who closely evaluate total cost and perceived value.

### Returns Matter to Younger Shoppers

| | |
|---|---|
| MILLENNIAL | 31% |
| GEN Z | 30% |
| GEN X | 29% |
| BOOMER | 24% |
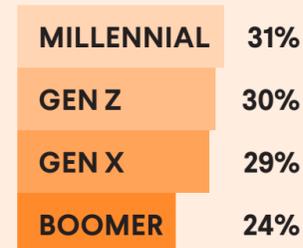
# 28%

Younger Australians place greater importance on easy returns. This feature reduces perceived risk and enables experimentation, making online channels feel safer than in-store purchases.

### Exclusive Online Offers Drive Digital Preference

| | |
|---|---|
| MILLENNIAL | 31% |
| WOMEN | 29% |
| GEN X | 25% |
| BOOMER | 20% |
| MEN | 20% |
| GEN Z | 19% |
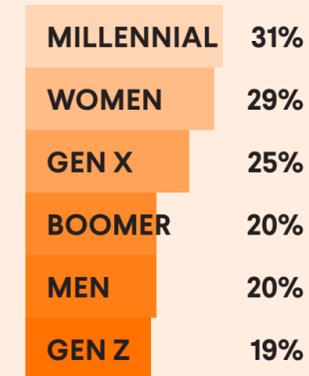
# 24%

Exclusive online discounts or bundles meaningfully tip purchase decisions toward brand websites by creating clear, incremental value that physical stores can't match, reinforcing online as the smarter, more rewarding option rather than just the convenient one.

### Convenience Drives Digital Preference

# 30%

Convenience strongly influences the decision to buy online, especially among Gen X and men. This reflects the appeal of reduced effort, time savings, and simplified purchasing compared with physical store visits.

## ⚲ Strategic Takeaways

**1. Use Free Shipping to Offset Store Immediacy**
Position free shipping as a direct alternative to in-store convenience, especially for older and value-conscious shoppers who heavily weigh total cost when deciding where to purchase.

**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. Win on Availability and Assortment**
Highlight broader selection and real-time inventory online to reinforce digital channels as the fastest path to finding desired products, especially for younger, convenience-driven shoppers.

**4. Compete on Speed, Not Just Price**
Invest in faster fulfillment and clearly communicate delivery timelines to meet younger shoppers' expectations and reduce the perceived advantage of immediate in-store purchase.

**5. Expand Convenience Beyond Checkout**
Offer flexible payment options and online-only access to reinforce digital convenience throughout the purchase experience, not just at the point of payment.

**6. Apply AI to Surface the Right Advantage at the Right Moment**
Not all shoppers prioritise the same benefits. AI-driven decisioning enables brands to dynamically emphasise the most relevant online advantage, shipping, convenience, access, or flexibility—based on individual behaviour rather than relying on static value propositions.

**11** 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 |
| Access to online-only products or early releases | 9% | 14% | 23% | 18% | 13% | 17% | 15% |
| Convenience | 29% | 34% | 25% | 30% | 28% | 33% | 30% |
| Delivery speed | 25% | 20% | 27% | 24% | 25% | 22% | 23% |
| Detailed product information & reviews | 13% | 17% | 18% | 14% | 20% | 12% | 16% |
| Easy and free returns | 24% | 29% | 31% | 30% | 26% | 30% | 28% |
| Exclusive online discounts or bundles | 20% | 25% | 31% | 19% | 29% | 20% | 24% |
| Flexible payment options (buy now/pay later) | 12% | 18% | 21% | 20% | 18% | 17% | 17% |
| Free shipping | 59% | 39% | 33% | 32% | 50% | 36% | 42% |
| None of these | 7% | 1% | 0% | 0% | 1% | 4% | 3% |
| Price comparisons | 24% | 31% | 22% | 30% | 24% | 30% | 27% |
| Product availability | 33% | 23% | 31% | 21% | 27% | 27% | 27% |

# What Helps the Most When Making Online Purchase Decisions

**Relevance and Urgency Outperform Information Alone**

Consumers are most influenced by onsite experiences that reduce effort and clarify value, rather than those that simply add information. Price-led signals and relevance cues are the strongest conversion drivers, reinforcing that shoppers want help deciding, not more to process.

Younger consumers respond particularly well to personalised recommendations, indicating rising expectations for adaptive, responsive experiences. Scarcity signals such as price drops and stock alerts also play a meaningful role, helping translate browsing into action. Older shoppers are more selective, with a higher likelihood of disengaging when experiences feel unnecessary or overwhelming.

Overall, the data suggests onsite experiences are most effective when they are timely, relevant, and clearly tied to purchase confidence.
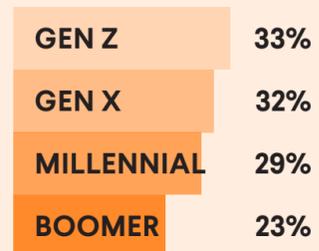
## ⬭⬭ Key Insights

### Price-Led Signals Drive the Strongest Lift

| | |
|---|---|
| GEN X | 59% |
| MILLENNIAL | 54% |
| BOOMER | 51% |
| GEN Z | 45% |
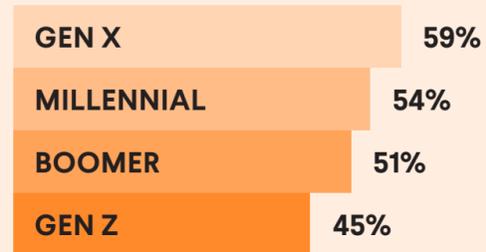
# 54%

Price-drop alerts are the strongest onsite conversion driver, reinforcing value sensitivity and the importance of timely pricing signals across all age groups.
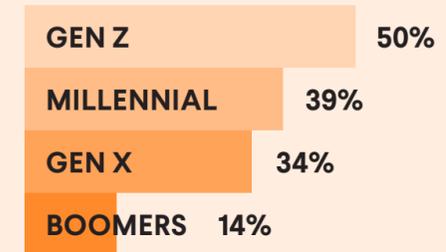
### Urgency Signals Matter

| | |
|---|---|
| GEN Z | 33% |
| GEN X | 32% |
| MILLENNIAL | 29% |
| BOOMER | 23% |

# 29%

Low-stock and back-in-stock alerts meaningfully increase purchase likelihood, especially among younger shoppers who respond to scarcity and availability cues.

### Personalisation Resonates With Younger Shoppers

| | |
|---|---|
| GEN Z | 50% |
| MILLENNIAL | 39% |
| GEN X | 34% |
| BOOMERS | 14% |

# 32%

Personalised recommendations and styling guidance are significantly more influential for Gen Z and Millennials (3x that of Boomers), highlighting expectations for relevance and assistance during browsing.

### Generic Experiences Fall Flat

# 17%

Only a small minority report that none of these experiences influence them, and just 1% of Gen Z, underscoring that most shoppers expect some form of helpful, contextual onsite engagement.

## Strategic Takeaways

**1. Replace Generic Experiences With Smart Signals**
Move away from one-size-fits-all onsite messaging in favor of behaviour-driven cues that adapt to shopper intent, surfacing the most relevant information at the moment it is most likely to influence purchase decisions.

**2. Use Price Alerts to Trigger Action**
Deploy price-drop alerts as high-intent conversion triggers, ensuring notifications are timely, product-specific, and tied to prior browsing behaviour so they feel helpful, relevant, and directly connected to shopper value expectations.

**3. Create Urgency Without Pressure**
Leverage low-stock and back-in-stock signals using accurate inventory data to encourage timely decisions while maintaining trust, avoiding artificial scarcity that could undermine credibility or long-term customer confidence.

**4. Truly-Personalise the Browsing Experience**
Deliver personalised recommendations and contextual guidance based on real-time browsing behaviour to reduce decision fatigue, increase confidence, and help shoppers move more efficiently from consideration to purchase.

WHEN BROWSING ONLINE, WHICH ONSITE EXPERIENCES INCREASE YOUR LIKELIHOOD TO PURCHASE?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Alerts when items are low in stock | 23% | 32% | 29% | 33% | 29% | 29% | 29% |
| Back-in-stock notices | 21% | 27% | 33% | 24% | 29% | 24% | 26% |
| None of these | 38% | 11% | 10% | 1% | 15% | 18% | 17% |
| Personalised recommendations based on browsing | 14% | 34% | 39% | 50% | 29% | 35% | 32% |
| Price-drop alerts | 51% | 59% | 54% | 45% | 55% | 53% | 54% |
| Styling or usage recommendations | 6% | 13% | 28% | 26% | 16% | 16% | 16% |
| Complicated checkout process | 19% | 11% | 16% | 23% | 15% | 17% | 16% |

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

# Barriers to Completing Online Purchases

**Unexpected Costs and Confidence Break Conversion**

When you've worked so hard to bring a customer to your website, get them to add an item to their cart, and start checkout, losing them at this moment is costly. It's like a shopper patiently lining up at the register in a physical store, only to walk away just as the cashier begins ringing them up. But that would happen if at this moment you tacked on fees, couldn't take their payment method or began asking for a host of unnecessary information to complete the purchase.

Australian consumers abandon direct online purchases primarily when cost friction or trust gaps emerge late in the journey. High shipping costs are the most common deterrent, reinforcing that value scrutiny peaks at checkout rather than during browsing.

Stock availability and brand trust also play a meaningful role, particularly when expectations set earlier in the journey are not met. Younger consumers introduce additional friction points, including payment flexibility and clarity around why offers are shown. Overall, abandonment is rarely emotional—it is practical. Purchases break down when the experience introduces surprise, uncertainty, or perceived unfairness at the moment of commitment.

## Key Insights

**Shipping Costs Are the Biggest Barrier**

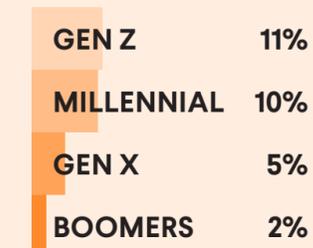| | |
|---|---|
| BOOMER | 42% |
| GEN X | 38% |
| MILLENNIAL | 30% |
| GEN Z | 25% |
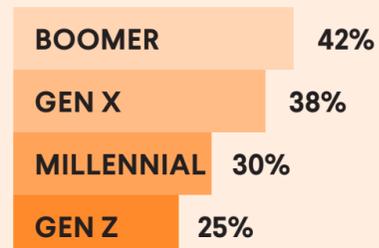
# 35%

High shipping costs are the most common reason shoppers abandon purchases, especially among older consumers, where unexpected fees quickly undermine perceived value.

**Confusion Undermines Confidence**

| | |
|---|---|
| GEN Z | 11% |
| MILLENNIAL | 10% |
| GEN X | 5% |
| BOOMERS | 2% |

# 6%

Unclear messaging around why an offer is shown or how it applies disproportionately affects younger shoppers, highlighting sensitivity to transparency and relevance.

**Trust Gaps Matter**

# 11%

Lingering trust concerns continue to stop purchases, with parity across demographics. These barriers highlight the importance of accurate inventory signals and reassurance throughout the buying journey.

## Strategic Takeaways

**1. Eliminate Cost Surprises Before Checkout**
High shipping costs are the single largest cause of abandonment in Australia. Brands should surface total cost, shipping thresholds, and delivery expectations earlier in the journey to prevent late-stage shock and protect trust at the moment of commitment.

**2. Balance Flexibility With Restraint at Checkout**
Flexible payment options support conversion for younger shoppers, but excess prompts can overwhelm others. Orchestrated checkout experiences should adapt to shopper needs, reinforcing convenience without introducing unnecessary complexity.

**3. Recovery Messaging**
AI-driven decisioning can detect hesitation signals, such as repeated cart views or checkout delays, and dynamically surface the most relevant reassurance, offer, or alternative. This allows brands to intervene constructively without relying on blanket discounts.

**4. Explain Relevance and Offers Clearly**
Provide clear explanations for why shoppers are seeing specific offers or messages, reinforcing transparency and relevance to prevent confusion from eroding confidence and stopping conversions.

**13** 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 |
| Confusion about why I'm seeing an offer | 2% | 5% | 10% | 11% | 5% | 8% | 6% |
| High shipping costs | 42% | 38% | 30% | 25% | 36% | 35% | 35% |
| Items out of stock | 16% | 21% | 15% | 14% | 20% | 15% | 17% |
| Lack of trust in the brand | 12% | 9% | 13% | 13% | 13% | 9% | 11% |
| None of these | 1% | 8% | 6% | 1% | 4% | 6% | 5% |
| Not enough payment options | 7% | 8% | 13% | 11% | 8% | 11% | 9% |

# Preferred Content Types That Get Shoppers to Your Website Again, and Again

## Value, Personalisation and Utility Outperform Storytelling

Consumers are most likely to return to brand-owned digital properties when content delivers clear, practical value. Promotions, loyalty rewards, and timely alerts consistently outperform inspirational or brand-led storytelling. This reflects a utilitarian mindset: repeat visits are earned through usefulness, not novelty.

However, younger consumers apply a broader definition of value. Personalised recommendations, behind-the-scenes content, and product guidance play a larger role for Gen Z and Millennials, signalling interest in content that feels tailored and informative rather than purely promotional. Older shoppers remain more selective, with a higher likelihood of disengaging from content that does not offer immediate relevance. Overall, repeat visitation is driven by relevance, restraint, and tangible benefit.

## Key Insights

### Promotions Drive Repeat Visits

| | |
|---|---|
| WOMEN | 54% |
| MILLENNIAL | 53% |
| GEN X | 50% |
| BOOMER | 49% |
| MEN | 43% |
| GEN Z | 36% |
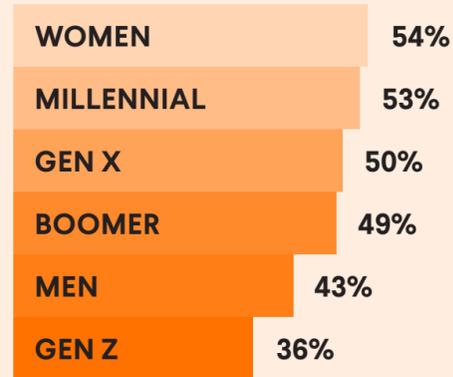
## 48%

Upcoming sales and promotions are the strongest driver of repeat brand visits overall, with Men and older consumers significantly over-indexing, reinforcing promotions as a primary reason to return, not just a conversion tactic.

### Loyalty Rewards Strengthen Engagement

| | |
|---|---|
| MILLENNIAL | 37% |
| GEN X | 32% |
| BOOMER | 25% |
| GEN Z | 22% |

## 30%

Actions offering loyalty points or rewards meaningfully encourage repeat visits, signaling that visible, ongoing value exchange sustains engagement beyond the initial purchase.

### Personalisation Pulls Men and Younger Shoppers Back

| | |
|---|---|
| GEN Z | 40% |
| MEN | 23% |
| GEN X | 19% |
| MILLENNIAL | 17% |
| WOMEN | 15% |
| BOOMER | 11% |
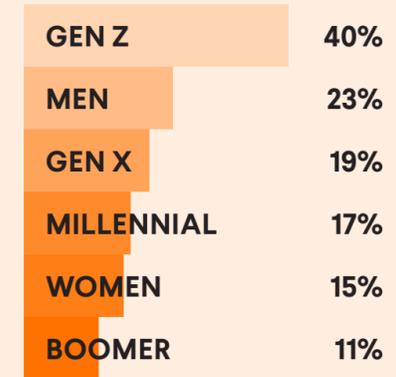
## 19%

Personalised recommendations based on browsing behaviour are significantly more motivating for Gen Z and men, reinforcing expectations for relevance and tailored experiences when revisiting brand sites or apps.

### Utility Content Is Secondary

| | |
|---|---|
| PRODUCT GUIDES | 10% |
| BRAND STORYTELLING | 6% |

## 17%

Product guides, how-to content and behind-the-scenes brand stories play a supporting role, but are far less influential than promotions, loyalty, and relevance in driving frequent brand visits.

### Reviews Are a Universal Trust Anchor

## 23%

Customer reviews and testimonials consistently drive return visits, highlighting social proof as a key reason consumers re-engage with brand-owned experiences.

## ⚹ Strategic Takeaways

**1. Design Post-Purchase as Part of the Experience**
Treat confirmation, shipping updates, and follow-up communication as extensions of the brand experience, ensuring clarity and reassurance that build confidence and reduce friction for future purchases.

**2. Use Incentives to Prompt the Next Action**
Deploy timely, relevant incentives after purchase to encourage repeat behaviour, balancing immediacy with brand value to motivate return without training shoppers to expect constant discounts.

**3. Apply AI to Personalise Utility, Not Noise**
Younger consumers respond strongly to personalised recommendations, but tolerance for irrelevant content is low. AI-driven decisioning should focus on surfacing the most useful content, products, alerts, or guidance, rather than increasing overall content volume.

**4. Reduce Effort for the Second Purchase**
Simplify reordering, saved preferences, and account access to make returning easier than leaving, reinforcing convenience as a key driver of long-term loyalty.

**5. Incorporate Storytelling Elements**
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.

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 |
| Actions offering me loyalty points or rewards | 26% | 32% | 37% | 22% | 33% | 28% | 30% |
| Behind-the-scenes brand stories | 0% | 7% | 9% | 14% | 5% | 7% | 6% |
| Customer reviews or testimonials | 17% | 21% | 34% | 24% | 24% | 23% | 23% |
| None of these | 25% | 4% | 1% | 3% | 7% | 10% | 9% |
| Personalised recommendations based on what I browsed | 11% | 19% | 17% | 40% | 15% | 23% | 19% |
| Product guides or how-to tips | 3% | 12% | 9% | 15% | 8% | 11% | 10% |
| Restock/low-stock alerts for items I care about | 20% | 21% | 21% | 19% | 25% | 17% | 20% |
| Upcoming sales or promotions | 49% | 50% | 53% | 36% | 54% | 43% | 48% |

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?

# Motivating Consumers to Opt-In for Brand Communications

### Value Unlocks Permission

The effectiveness of email and text marketing hinges on motivating consumers to opt into brand communications. Consumers are willing to opt into brand communications, but only when the value exchange is clear and immediate. Practical incentives, particularly free shipping and loyalty rewards far outweigh content-driven or experiential offers.

Younger consumers show broader motivation, responding to early access, exclusive content, and control over communication frequency. Older shoppers are more selective, with a higher likelihood of rejecting opt-in altogether unless the offer is clearly worthwhile. Overall, opt-in decisions reflect a pragmatic mindset: consumers will share access to their inbox or phone when brands respect their time, deliver value, and provide visible control.

## Key Insights

### Free Shipping Is the Strongest Opt-In Driver

| | |
|---|---|
| GEN X | 47% |
| WOMEN | 46% |
| BOOMER | 43% |
| MILLENNIAL | 39% |
| MEN | 36% |
| GEN Z | 26% |
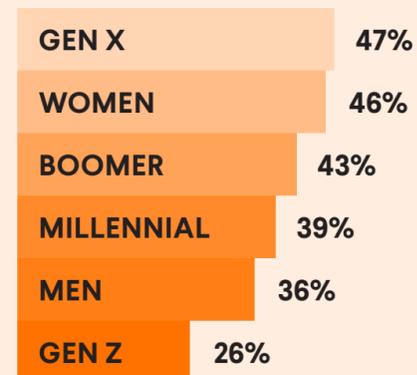
# 41%

Free shipping is the most compelling incentive overall, particularly among older consumers and women, reinforcing cost reduction as the clearest and most universally understood value exchange.

### Loyalty Rewards Drive Willingness to Share Access

| | |
|---|---|
| GEN X | 44% |
| WOMEN | 41% |
| MILLENNIAL | 33% |
| GEN Z | 32% |
| MEN | 28% |
| BOOMER | 22% |
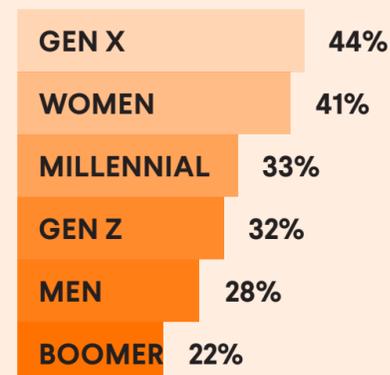
# 34%

With consumers tightening their belts, loyalty points redeemable for rewards strongly motivate women and younger cohorts to opt-in, signaling appetite for ongoing, accumulative value rather than one-time incentives alone.

### A Meaningful Minority Remains Unpersuaded

| | |
|---|---|
| BOOMER | 32% |
| MEN | 20% |
| GEN X | 12% |
| WOMEN | 12% |
| MILLENNIAL | 9% |
| GEN Z | 8% |
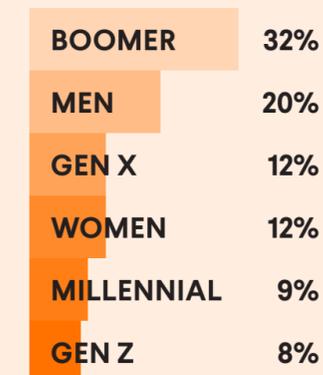
# 16%

A notable share of Australians, especially Boomers, followed by men say none of these offers would convince them to opt in. This reinforces the importance of restraint and selective targeting.

### Younger Shoppers Want Early Access

| | |
|---|---|
| EARLY ACCESS | 21% |
| EXCLUSIVE CONTENT | 21% |

Gen Z and Millennials are more motivated by early product access and exclusive content. These incentives signal insider status and relevance rather than purely financial gain.

## Strategic Takeaways

**1. Make the Value Exchange Explicit at the Moment of Opt-In**
Australians opt in when the benefit is clear and immediate. Free shipping and loyalty rewards should be surfaced prominently and tied directly to the action, ensuring permission feels earned rather than assumed.

**2. Truly Personalised Offers**
Use identity-driven tools to segment incentives by shopper profile, prioritizing free shipping and cost-based rewards for older, value-focused consumers, while offering younger audiences exclusive access, early product drops, and insider experiences that feel differentiated and earned.

**3. Lead With Control to Build Trust**
Control over frequency and quiet hours meaningfully reduces resistance, particularly among younger consumers. Brands should frame preference management as a benefit, reinforcing respect for time and attention rather than as a compliance afterthought.

**4. Use Exclusivity to Attract Younger Audiences**
Leverage early access to products and launches as opt-in incentives for Gen Z and Millennials, tapping into demand for insider status and differentiated brand experiences.

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 |
| Control over frequency/quiet hours | 18% | 9% | 23% | 22% | 16% | 17% | 16% |
| Early access to their new products | 15% | 22% | 24% | 29% | 28% | 15% | 21% |
| Exclusive access to content | 11% | 21% | 27% | 28% | 16% | 25% | 21% |
| Free shipping | 43% | 47% | 39% | 26% | 46% | 36% | 41% |
| Loyalty points later used for rewards | 22% | 44% | 33% | 32% | 41% | 28% | 34% |
| None of these | 32% | 12% | 9% | 8% | 12% | 20% | 16% |
| One time discount | 0% | 0% | 0% | 8% | 1% | 2% | 1% |
| Personalized content--not just discounts | 0% | 0% | 0% | 3% | 0% | 1% | 0% |
| VIP warranty service | 9% | 11% | 13% | 11% | 9% | 12% | 11% |

# Where Consumers Discover Deals and Promotions Online

**Direct Channels Still Lead, but Preferences Fragment by Age**

Consumers continue to prefer learning about brand offers through direct, owned channels, with email and brand websites remaining the most trusted and familiar sources. These channels offer clarity, control, and perceived legitimacy, particularly for older shoppers.

However, preferences diversify meaningfully by age. Younger Australians are more open to apps, social advertising, and personalised discovery driven by browsing behaviour. Peer recommendations also play a consistent role across generations, reinforcing the influence of social proof alongside brand-led communication.

Overall, the data suggests that effective offer discovery depends on meeting consumers where they already engage, balancing trusted direct channels with selective use of emerging and social touchpoints.

## Key Insights

**Email Remains the Primary Discovery Channel**

| | |
|---|---|
| BOOMER | 55% |
| WOMEN | 43% |
| GEN X | 33% |
| MILLENNIAL | 33% |
| MEN | 30% |
| GEN Z | 16% |
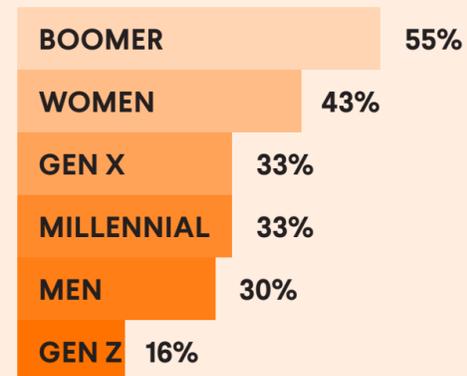
# 36%

Email is the most preferred way to learn about offers overall, particularly among older consumers and women, reinforcing its role as a trusted, permission-based communication channel.

**Brand-Owned Properties Drive Engagement**

| | |
|---|---|
| BRAND WEBSITE | 29% |
| BRAND APP | 22% |
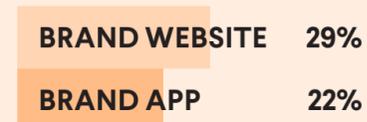
Good news for brands is that rather than throwing money at the walled gardens, consumers strongly prefer discovering offers directly on brand-owned websites and apps, highlighting the importance of owned environments for controlled, high-intent engagement.

**Younger Consumers Seek Personalised Signals**

| | |
|---|---|
| MILLENNIAL | 34% |
| GEN Z | 23% |
| WOMEN | 22% |
| GEN X | 16% |
| MEN | 16% |
| BOOMERS | 8% |
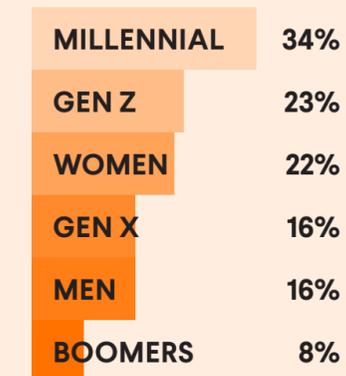
# 19%

Younger shoppers and women are more likely to prefer offers surfaced based on their browsing behaviour, signaling expectations for relevance and personalisation in discovery.

**Offline Still Influences Awareness**

| | |
|---|---|
| FRIENDS & FAMILY | 23% |
| IN-STORE PROMOTIONS | 20% |

In-store promotions and personal recommendations remain meaningful discovery channels, reinforcing that physical and social touchpoints still shape digital purchase behaviour.

## Strategic Takeaways

**1. Prioritise Direct Channels as the Foundation**
Email, brand websites, and apps remain the most trusted environments for learning about offers, particularly among older Australians. Brands should continue to anchor value-led communication in owned channels where clarity, control, and consistency are highest.

**2. Use Identity to Meet Shoppers Where They Already Engage**
Preferences for discovery vary by age. Identity-driven insight allows brands to route offers through the channels each shopper already trusts, email for some, apps or websites for others—without forcing uniform channel strategies.

**3. Apply AI to Coordinate, Not Compete Across Channels**
Younger Australians are receptive to social and behaviour-driven discovery, but only when relevance is clear. AI-driven decisioning helps coordinate timing and channel selection, ensuring offers feel connected rather than duplicated across touchpoints.

**4. Orchestrate Social and Paid Touchpoints With Restraint**
Social and paid discovery should complement, not replace, direct channels. Orchestration ensures these touchpoints act as entry points that guide shoppers back into owned environments, where deeper engagement and value can be delivered.

**5. Leverage Social Proof Without Over-Reliance**
Friends and family recommendations remain influential across generations. Brands should amplify social proof selectively— through reviews, testimonials, and sharing mechanisms— without attempting to over-engineer peer-driven influence.

**6. Protect Trust Through Frequency and Channel Control**
As channel choice expands, so does the risk of overexposure. Clear frequency management and channel coordination protect trust, reinforcing that brand presence is helpful and expected rather than intrusive.

**16** 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 |
| Brand's ads on social based on my browsing | 8% | 16% | 34% | 23% | 22% | 16% | 19% |
| Brand's organic posts | 3% | 8% | 13% | 11% | 5% | 10% | 8% |
| Brand's own app | 16% | 21% | 29% | 24% | 21% | 22% | 22% |
| Brand's own website | 33% | 30% | 31% | 20% | 30% | 29% | 29% |
| Direct mail | 9% | 5% | 9% | 4% | 7% | 6% | 7% |
| Email | 55% | 33% | 33% | 16% | 43% | 30% | 36% |
| Friends or family recommendations | 25% | 21% | 24% | 22% | 23% | 22% | 23% |
| In-store promotions | 17% | 22% | 20% | 21% | 22% | 19% | 20% |
| Influencer content | 0% | 4% | 12% | 25% | 9% | 7% | 8% |
| My preference center/brand account | 0% | 0% | 0% | 5% | 1% | 1% | 1% |
| None of these | 5% | 1% | 2% | 1% | 2% | 3% | 3% |
| Other (Please specify) | 0% | 0% | 1% | 5% | 1% | 1% | 1% |
| Search | 24% | 30% | 11% | 13% | 16% | 27% | 22% |
| TV ads | 22% | 10% | 6% | 6% | 11% | 12% | 12% |
| Text | 12% | 18% | 10% | 11% | 16% | 12% | 14% |

# Preferred Channels to Get Consumers Back to Buy

### Email Leads, but Younger Audiences Diversify

When it comes to follow-up offers based on browsing behaviour, Australian consumers show a clear preference for familiar, low-pressure channels. Email remains the dominant choice overall, reflecting its perceived control, clarity, and legitimacy. For many consumers, email strikes the right balance between relevance and intrusion.

However, channel preferences fragment meaningfully by age. Younger consumers are far more open to SMS and app-based notifications, signalling comfort with immediacy when the message is clearly tied to recent intent. Paid ads and richer media formats play a secondary role, while outright rejection of follow-up remains a minority position. Overall, effective re-engagement depends on matching channel choice to expectations and life stage.
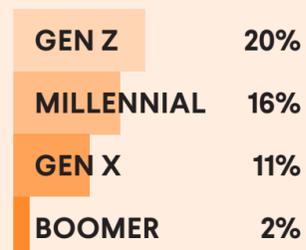
## Key Insights

**Email Is the Default Re-Engagement Channel**

| | |
|---|---|
| BOOMER | 59% |
| GEN X | 47% |
| MILLENNIAL | 33% |
| GEN Z | 18% |
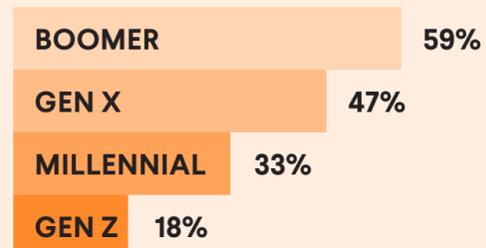
# 43%

Email is the most preferred follow-up method overall especially among older consumers, reinforcing its role as the most trusted and least intrusive re-engagement channel.
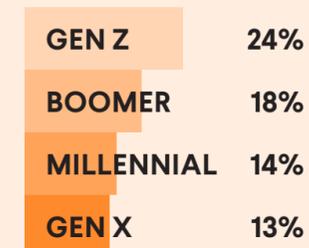
**Younger Consumers Lean Mobile-First**

| | |
|---|---|
| GEN Z | 24% |
| BOOMER | 18% |
| MILLENNIAL | 14% |
| GEN X | 13% |

# 16%

Short SMS messages beat email for Gen Z shoppers, reflecting comfort with quick, mobile-native re-engagement when messaging is concise and timely.

**Push Gain Relevance With Youth**

| | |
|---|---|
| GEN Z | 20% |
| MILLENNIAL | 16% |
| GEN X | 11% |
| BOOMER | 2% |

# 11%

Younger cohorts show higher receptivity to app push notifications, signaling openness to more immersive re-engagement within environments they actively use.
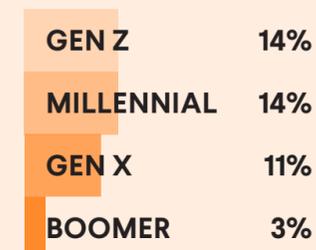
**Paid Retargeting Is Least Preferred**

| | |
|---|---|
| GEN Z | 14% |
| MILLENNIAL | 14% |
| GEN X | 11% |
| BOOMER | 3% |

# 10%

Ads placed offsite are less preferred than direct brand communication, reinforcing that re-engagement is more effective when it occurs in owned or opted-in environments.

## Strategic Takeaways

**1. Lead With Email for Broad Re-Engagement**
Use email as the primary follow-up channel for abandoned browsing or carts, particularly for older consumers who expect clarity, detail, and control in brand communications.

**2. Match Channel to Age and Context**
Continuously monitor consumer engagement metrics across channels to refine strategies. Leverage feedback and behavioural data to stay ahead of shifting preferences and maximize communication effectiveness. Deploy SMS, MMS, and app push notifications more selectively for younger shoppers, ensuring messages are timely, concise, and clearly connected to prior browsing behaviour.

**3. Prioritise Owned, Opted-In Touchpoints**
Focus re-engagement efforts on channels consumers have explicitly opted into, reinforcing trust and continuity rather than relying on lower-preference paid retargeting.

**4. Keep Follow-Ups Contextual and Respectful**
Ensure re-engagement messages clearly reference what shoppers viewed or considered, maintaining relevance and avoiding generic reminders that risk feeling intrusive.

**17** 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 |
| None of these | 15% | 6% | 9% | 4% | 9% | 9% | 9% |
| Send a push notification via their app I downloaded | 2% | 11% | 16% | 20% | 12% | 10% | 11% |
| Send a short text-only message to my mobile phone (SMS) | 18% | 13% | 14% | 24% | 21% | 12% | 16% |
| Send a text message with imagery or video to my mobile phone (MMS) | 4% | 11% | 15% | 20% | 10% | 12% | 11% |
| Send an email | 59% | 47% | 33% | 18% | 42% | 44% | 43% |
| Target me with an ad placed on social media or a website that is not the brand's website | 3% | 11% | 14% | 14% | 6% | 14% | 10% |

# Messaging Cadence

### Tolerance Is Channel-Specific and Skews Lower Than Brands Expect

Consumers show clear limits on how often they want to hear from brands, even those they consider favourites. Across channels, lower message frequency is consistently preferred, with one to two messages per week emerging as the comfort zone. Tolerance drops sharply beyond this point, particularly for email and push notifications.

Text messages are slightly more accepted at higher frequencies, signalling their perceived immediacy and relevance when used sparingly. Younger consumers are marginally more tolerant overall, but even Gen Z shows resistance to high-volume messaging. The data reinforces a critical point: acceptability is driven less by brand affinity and more by perceived usefulness, timing, and channel appropriateness.
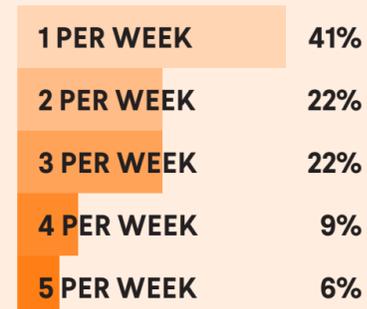
## Key Insights

### One Message Per Week Is the Safe Baseline

| | |
|---|---|
| TEXT | 49% |
| PUSH NOTIFICATIONS | 46% |
| ADS | 44% |
| EMAIL | 41% |
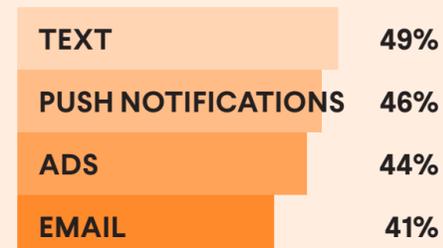
Across channels, one message per week represents the most broadly acceptable frequency, reinforcing restraint as the default expectation.

### Paid Ads Have the Lowest Frequency Ceiling

| | |
|---|---|
| 1 PER WEEK | 41% |
| 2 PER WEEK | 22% |
| 3 PER WEEK | 22% |
| 4 PER WEEK | 9% |
| 5 PER WEEK | 6% |

Email shows the widest tolerance range, with acceptance rising steadily as frequency increases. Unlike other channels, shoppers are comfortable receiving multiple weekly emails, signaling email's role as the most flexible channel for sustained, value-led communication.

### Tolerance Drops Quickly Beyond Two Messages

| | |
|---|---|
| EMAIL | 22% |
| PUSH NOTIFICATIONS | 21% |
| ADS | 21% |
| TEXT | 19% |
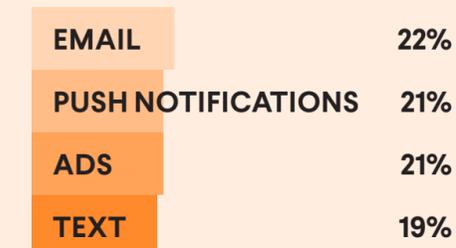
Acceptance declines by half at two messages per week, signaling a narrow margin between effective engagement and over-messaging.

### High-Frequency Messaging Is Niche

Only a small minority are comfortable with high-frequency messaging via email, ads, text and push, reinforcing that aggressive cadences should be reserved for highly engaged, explicitly opted-in audiences.

## ⚲ Strategic Takeaways

**1. Design Frequency by Channel, Not Campaign**
Set different cadence rules for email, push, ads, and text based on consumer tolerance, rather than applying uniform frequency across all touchpoints.

**2. Let Engagement Govern Escalation**
Use engagement signals and preference controls to dynamically adjust frequency, ensuring higher volume is earned through interaction rather than assumed.

**3. Default to One or Two, Earn More**
Anchor messaging at one or two sends per week by default, increasing frequency only in response to clear engagement signals or explicit consumer preference.

**4. Use Push for Timely, High-Intent Moments**
Reserve higher-frequency messaging for app push notifications tied to real behaviour, where tolerance is highest and relevance can be clearly demonstrated.

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?

# Messages That Would Persuade a Consumer to Purchase Directly

**Price and Intent Signals Get Consumers Back to Buy**

When Australians consider purchasing directly from a brand after browsing, the messages most likely to convert are those that reduce financial or availability risk. Discount-led messages dominate, reinforcing that value clarity remains the most powerful lever in driving direct conversion.

However, urgency and relevance also play a critical role. Price drops, back-in-stock alerts, and reminders tied to known intent consistently outperform broad brand sales or generic recommendations. Younger consumers are more receptive to personalised and intent-based prompts, while older shoppers remain anchored in clear, item-specific value cues. Overall, messages convert when they feel timely, specific, and grounded in the shopper's recent behaviour rather than promotional in tone.

## ⬯⬯ Key Insights

**Discount Codes and Price Drops Lead Conversion**

| | |
|---|---|
| DISCOUNT CODES | 43% |
| PRICE DROP ON VIEWED ITEM | 40% |

Price-led messages are the most persuasive overall. Discount codes and single-item price drops clearly outperform other message types, reinforcing that Australians prioritise immediate, transparent savings when deciding to buy direct.

**Product-Specific Beats Brand-Wide**

| | |
|---|---|
| GENERAL BRAND SALE | 24% |

Messages tied to a specific item outperform general brand sales by almost 2x, reinforcing that relevance outweighs scale in post-visit persuasion.

**Reminders and Availability Signals Support Intent**

| | |
|---|---|
| BACK-IN-STOCK NOTICES | 27% |
| CART REMINDERS | 21% |
| LOW-IN-STOCK NOTICES | 16% |

Back-in-stock, low-stock and cart abandonment notifications meaningfully influence purchase decisions. These messages reduce uncertainty and reintroduce urgency, particularly for shoppers who previously showed intent but were unable to convert.

## Strategic Takeaways

**1. Anchor Messaging to Demonstrated Intent**
Prioritise post-visit messages tied directly to
products shoppers viewed or added to cart, using
price drops or targeted discounts to reinforce
relevance and accelerate decision-making.

**2. Use Discounts Strategically, Not Broadly**
Deploy discount codes and offers selectively
based on intent signals to drive conversion without
training shoppers to wait for blanket promotions.

**3. Support, Don't Overwhelm, With Reminders**
Use cart reminders and stock notifications
as intent-capture tools, ensuring timing and
frequency are carefully managed to maintain
usefulness without creating fatigue.

**4. 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.

**19** 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 |
| Discount codes | 42% | 42% | 48% | 39% | 47% | 39% | 43% |
| General brand sale across many items | 19% | 24% | 26% | 29% | 18% | 28% | 24% |
| Loyalty program offers | 0% | 0% | 0% | 6% | 0% | 1% | 1% |
| New items that are similar to what I viewed previously | 11% | 16% | 14% | 30% | 14% | 18% | 16% |
| None of these | 19% | 12% | 8% | 3% | 11% | 12% | 12% |
| Notice that an item I viewed online is back in stock | 27% | 28% | 27% | 23% | 30% | 24% | 27% |
| Notice that an item I viewed online is low in stock | 13% | 18% | 15% | 18% | 14% | 18% | 16% |
| Post-purchase recommendations for what to buy next | 0% | 5% | 12% | 16% | 4% | 9% | 7% |
| Price drop offer on a single item I viewed | 48% | 37% | 39% | 34% | 42% | 38% | 40% |
| Recommendations for alternatives when an item is out of stock | 11% | 6% | 24% | 21% | 13% | 14% | 14% |
| Reminders for items I left in my cart | 16% | 21% | 27% | 21% | 24% | 18% | 21% |

# Improving Cart Abandonment Messaging

**Relevance and Restraint Matter More Than Timing**

Consumers are clear that helpful brand messaging is defined by relevance, not frequency. Fewer, more meaningful messages outperform increased volume across every age group, reinforcing that attention is earned through usefulness rather than persistence.

Younger consumers raise expectations further, responding strongly to messages that are triggered by their own interactions and behaviours. Transparency and control also play an important supporting role, particularly for Gen Z, who value understanding why messages appear. Overall, the data suggests that helpful messaging is contextual, intentional, and respectful, designed to support decision making rather than compete for attention.

## Key Insights

**Fewer, More Relevant Messages Matter Most**

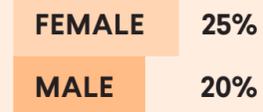| | |
|---|---|
| MILLENNIAL | 49% |
| GEN X | 48% |
| BOOMER | 43% |
| GEN Z | 36% |
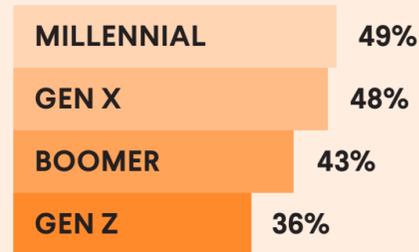
## 45%

Reducing message volume while increasing relevance is the top driver of perceived helpfulness, especially among Millennials and Gen X who show the lowest tolerance for excess communication.
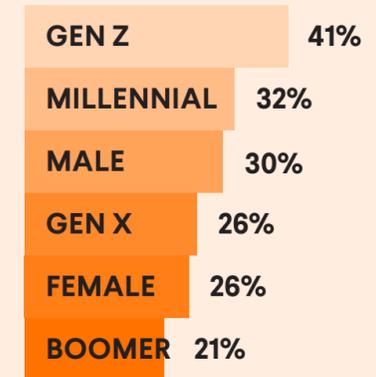
**Channel Preference Still Plays a Role**

## 23%

| | |
|---|---|
| FEMALE | 25% |
| MALE | 20% |

Receiving messages in a preferred channel improves usefulness, but ranks below relevance and triggering, suggesting channel choice enhances, but does not replace message quality.

**Triggered Messages Increase Usefulness**

| | |
|---|---|
| GEN Z | 41% |
| MILLENNIAL | 32% |
| MALE | 30% |
| GEN X | 26% |
| FEMALE | 26% |
| BOOMER | 21% |

## 28%

Messages triggered by consumer interactions are significantly more helpful to younger shoppers and men, reinforcing expectations for responsiveness tied directly to behaviour.

**Transparency Supports**

## 19%

Clear explanations for why a message was received are valued, but trail behind relevance and behaviour-based timing in driving perceived helpfulness.

## ⚹ Strategic Takeaways

**1. Reduce Volume Before Improving Timing**
Audit message frequency and suppress low-value sends to ensure every communication earns attention, particularly for older consumers who are most sensitive to over-messaging.

**2. Anchor Messaging to Real Behaviour**
Prioritise triggered messages based on browsing, cart activity, or engagement signals to ensure outreach feels timely, relevant, and directly connected to shopper intent. Deliver triggered messages with the right message at the right time after consumer actions while interest remains high.

**3. Optimise Channel Preference Second**
Use preferred channels to enhance delivery once relevance is established, recognizing that channel choice amplifies message value but cannot compensate for poor targeting.

**4. Pair Transparency With Relevance**
Explain why messages are sent, but ensure explanations accompany genuinely useful, behaviour-driven content so transparency reinforces trust rather than justifying noise.

WHICH WOULD MAKE BRAND MESSAGES MORE HELPFUL?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Back in stock | 42% | 25% | 31% | 28% | 34% | 28% | 31% |
| Complementary items after purchase | 24% | 25% | 37% | 37% | 30% | 28% | 29% |
| Low stock | 6% | 24% | 9% | 19% | 15% | 16% | 16% |
| None of these | 11% | 3% | 1% | 4% | 5% | 4% | 5% |
| Price drop | 63% | 69% | 55% | 47% | 68% | 55% | 61% |
| Similar alternatives if out of stock | 15% | 24% | 35% | 29% | 19% | 30% | 25% |

# Preferred Alerts for Abandoned Carts

## Price and Availability Drive Engagement

When it comes to cart abandonment alerts, consumers overwhelmingly favor signals that deliver clear, immediate value. Price drops and availability updates clearly outperform other alert types, reinforcing that shoppers want help acting on intent rather than ongoing persuasion.

While back-in-stock alerts appeal broadly, younger consumers show greater openness to more sophisticated alerts, such as complementary items or alternatives when products are unavailable. Older Australians remain more focused on core utility—knowing when an item is cheaper or available again. Overall, alerts are welcomed when they are timely, item-specific, and clearly connected to a shopper's expressed interest, rather than generic or promotional in nature.

## Key Insights

### Price Drops Are the Clear Standout

| | |
|---|---|
| GEN X | 69% |
| WOMEN | 68% |
| BOOMER | 63% |
| MILLENNIAL | 55% |
| MEN | 55% |
| GEN Z | 47% |
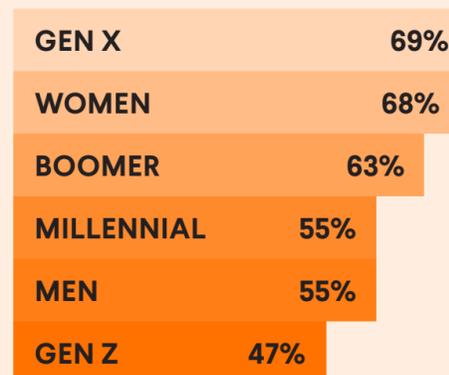
# 61%

Price drop notifications are the most desired alert overall, particularly among older cohorts and women. These alerts provide immediate, tangible value and help shoppers justify returning to complete a purchase.
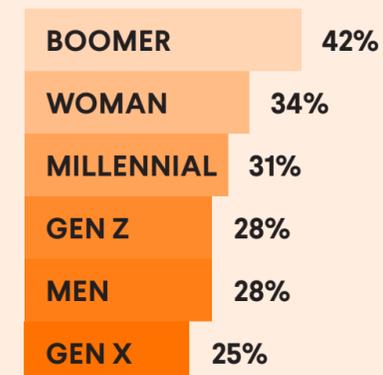
### Availability Alerts Support Intent

| | |
|---|---|
| BOOMER | 42% |
| WOMAN | 34% |
| MILLENNIAL | 31% |
| GEN Z | 28% |
| MEN | 28% |
| GEN X | 25% |

# 31%

Back-in-stock alerts are especially important for older consumers, who are more likely to wait for availability rather than substitute. These alerts help brands recover demand that would otherwise be lost.

### Complementary Items Add Value Post-Purchase

| | |
|---|---|
| GEN Z | 37% |
| MILLENNIAL | 37% |
| GEN X | 25% |
| BOOMER | 24% |

# 29%

Alerts recommending complementary items after purchase resonate strongly, suggesting openness to guidance when it feels useful rather than disruptive.
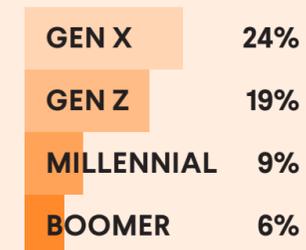
### Urgency Alone Has Limited Pull

| | |
|---|---|
| GEN X | 24% |
| GEN Z | 19% |
| MILLENNIAL | 9% |
| BOOMER | 6% |

# 16%

Low-stock alerts play a secondary role overall, with stronger appeal among younger consumers. These alerts support urgency but are less universally valued than price or availability cues.

## ⚲ Strategic Takeaways

**1. Prioritize Price-Driven Alerts**
Lead alert strategies with price-drop notifications tied to items shoppers have viewed, using savings as the primary motivator to re-engage and accelerate purchase decisions.

**2. Use Availability Alerts to Capture Deferred Demand**
Deploy back-in-stock alerts for high-intent shoppers, particularly younger audiences, to convert interest that may not result in immediate purchase.

**3. Add Value With Complementary Recommendations**
Introduce complementary product alerts after purchase to support discovery and incremental value, ensuring recommendations feel helpful and contextually relevant.

**4. Be Selective With Urgency Signals**
Limit low-stock alerts to moments of genuine relevance, pairing urgency with value to avoid alert fatigue and preserve trust.

FOR ITEMS YOU VIEW, WHICH ALERTS WOULD YOU WANT?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Back in stock | 42% | 25% | 31% | 28% | 34% | 28% | 31% |
| Complementary items after purchase | 24% | 25% | 37% | 37% | 30% | 28% | 29% |
| Low stock | 6% | 24% | 9% | 19% | 15% | 16% | 16% |
| None of these | 11% | 3% | 1% | 4% | 5% | 4% | 5% |
| Price drop | 63% | 69% | 55% | 47% | 68% | 55% | 61% |
| Similar alternatives if out of stock | 15% | 24% | 35% | 29% | 19% | 30% | 25% |

# Consumer Sentiment to Personalised Brand Ads on Social Channels

### Relevance Determines Acceptance

Consumers do not respond to paid social retargeting in a uniform way. Instead, acceptance is highly conditional, shaped by relevance, frequency, and perceived usefulness. While outright annoyance exists, particularly among older consumers, most Australians evaluate these ads pragmatically rather than emotionally.

Younger consumers are significantly more receptive, viewing retargeted social ads as helpful or acceptable when they align with current intent.

Neutral responses remain common across all groups, suggesting that paid social rarely enhances brand perception on its own, but can quickly erode it when mismanaged. Overall, social retargeting is tolerated when it feels timely and restrained, and rejected when it feels repetitive or intrusive.

## 𝄞 Key Insights

**Relevance and Frequency Decide Sentiment**

| | |
|---|---|
| GEN Z | 43% |
| MILLENNIAL | 40% |
| GEN X | 24% |
| BOOMER | 19% |
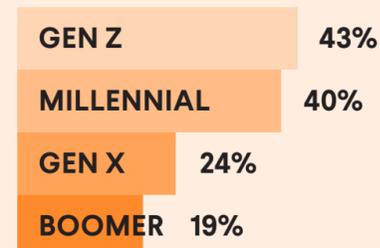
# 29%

The most common response is conditional acceptance, with the caveat that it depends on ad relevance and frequency, highlighting tolerance rather than enthusiasm for retargeted social ads. The younger the consumer the more responsive they are.
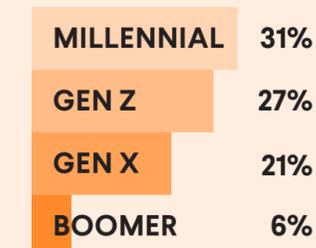
**Annoyance Increases With Age**

| | |
|---|---|
| BOOMER | 35% |
| GEN X | 23% |
| GEN Z | 7% |
| MILLENNIAL | 6% |
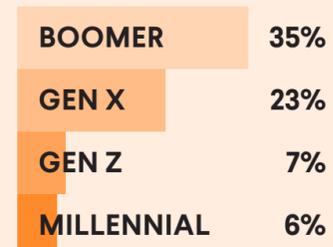
# 20%

Boomers are more likely to find social ads annoying, reinforcing lower tolerance for perceived repetition or lack of control in cross-channel brand exposure.

**Younger Consumers Are More Receptive**

| | |
|---|---|
| MILLENNIAL | 31% |
| GEN Z | 27% |
| GEN X | 21% |
| BOOMER | 6% |

# 20%

Predictably, younger shoppers are more likely to find these ads helpful, signaling higher comfort with cross-channel personalisation when it aligns with recent intent.

**Neutral Reactions Outnumber Positives**

# 23%

Almost one-quarter of consumers of all cohorts feel apathetic about seeing ads from opted-in brands, reinforcing that social retargeting is often accepted as background noise rather than a value-add.

## Strategic Takeaways

**1. Orchestrate Ads as a Continuation of Owned Experiences**

Treat social ads as an extension of email, onsite, and app interactions, not a separate tactic. When ads reflect recent browsing or known preferences, they reinforce continuity rather than feeling like disconnected retargeting.

**2. Let Identity Drive Relevance, Not Volume**

Use consented, identity-based signals to ensure ads are personalised and timely, reducing reliance on broad retargeting pools that increase repetition and fatigue without adding relevance.

**3. Control Frequency to Protect Trust**

Aggressively manage ad frequency across channels, especially for opted-in consumers. Fewer, better-timed impressions reinforce value and prevent annoyance, particularly among older shoppers with lower tolerance for repetition.

**4. Replace Retargeting With Suppression When Intent Is Satisfied**

Actively suppress ads once a consumer has converted or meaningfully re-engaged. Respecting intent completion signals brand intelligence and restraint, turning cross-channel advertising into a trust-building mechanism.

**22** IF A BRAND YOU'VE OPTED INTO ALSO SHOWS YOU ADS ON INSTAGRAM/
FACEBOOK BASED ON YOUR BROWSING, HOW DO YOU FEEL?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Annoyed | 35% | 23% | 6% | 7% | 19% | 22% | 20% |
| Depends on frequency/relevance | 19% | 24% | 40% | 43% | 29% | 28% | 29% |
| Helpful | 6% | 21% | 31% | 27% | 20% | 20% | 20% |
| Neutral | 23% | 24% | 20% | 23% | 25% | 20% | 23% |
| None of these | 18% | 9% | 2% | 1% | 7% | 10% | 9% |

# Improving the Ad Experience for Consumers

**Control and Relevance Matter More Than Removal**

Consumers are not broadly asking for ads to disappear altogether. Instead, they want greater control over how ads appear and clearer justification for why they are seeing them. The strongest preference is the ability to opt out of ads while still receiving brand emails or texts, signalling a desire to separate paid media exposure from direct brand relationships.

Younger consumers place greater emphasis on relevance and choice, while older audiences prioritise reduction and avoidance. Transparency also plays a meaningful role, particularly for Gen Z, who expect explanation as part of the value exchange. Overall, improving ad experiences is less about volume and more about agency, clarity, and alignment with intent.

## Key Insights

**Preference-Based Targeting Resonates With Youth and Men**

| | |
|---|---|
| MILLENNIAL | 35% |
| GEN Z | 34% |
| MEN | 33% |
| GEN X | 29% |
| WOMEN | 25% |
| BOOMER | 22% |
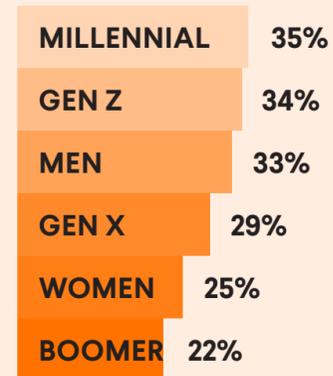
# 29%

Allowing consumers to choose categories they see ads for meaningfully improve acceptance, especially among younger shoppers and men who expect control and customization.

**Fewer, More Relevant Ads Improve Sentiment**

| | |
|---|---|
| MILLENNIAL | 36% |
| GEN Z | 34% |
| GEN X | 34% |
| BOOMER | 17% |
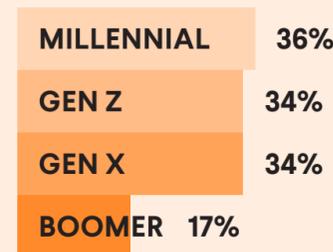
# 30%

Reducing volume while increasing relevance is the single strongest driver of improved ad sentiment, particularly among younger consumers, who show the highest sensitivity to ad overload.

**Transparency Helps, but Isn't Enough**

| | |
|---|---|
| GEN Z | 23% |
| GEN X | 19% |
| MEN | 18% |
| WOMAN | 14% |
| MILLENNIAL | 13% |
| BOOMER | 10% |
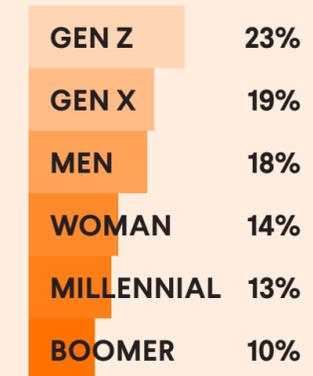
# 16%

Clear explanations for why ads appear are appreciated, but rank below control and relevance, signaling that understanding alone does not offset poor ad experiences.

**Opt-Out Flexibility Builds Trust**

# 41%

The ability to opt out of ads while keeping emails or texts significantly has cross-generational appeal and improves how ads are perceived, reinforcing demand for separation between paid media and owned communication.

## ⚐ Strategic Takeaways

**1. Give Consumers Explicit Control Over Ads**
Allow shoppers to opt out of ads without losing email or text access, reinforcing trust by separating paid media from owned communications while preserving valuable brand relationships.

**2. Use Identity to Drive Fewer, Better Impressions**
Leverage consented, identity-based signals to reduce unnecessary ad volume and ensure ads are timely, relevant, and aligned with known interests rather than broad retargeting tactics.

**3. Let Shoppers Define Relevance**
Enable category- or interest-level ad preferences so consumers can actively shape what they see, improving sentiment and effectiveness—especially among younger audiences who expect participatory personalisation.

**4. Pair Transparency With Actionable Restraint**
Explain why ads are shown, but reinforce that message with tangible controls like frequency caps, suppression after engagement, and preference management to turn transparency into a better lived experience.

WHAT WOULD MAKE THOSE
ADS FEEL BETTER?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
|---|---|---|---|---|---|---|---|
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Ability to opt-out of ads but keep emails/texts | 42% | 38% | 47% | 35% | 44% | 38% | 41% |
| Clear "why am I seeing this" | 10% | 19% | 13% | 23% | 14% | 18% | 16% |
| Fewer, more relevant ads | 17% | 34% | 36% | 34% | 30% | 30% | 30% |
| None of these | 26% | 9% | 7% | 3% | 9% | 14% | 12% |
| Only see ads for categories I choose | 22% | 29% | 35% | 34% | 25% | 33% | 29% |

# Consumer Sentiment on AI Personalization in Shopping

### AcOpenness Is Conditional on Control

Australian consumers show cautious optimism towards AI-driven personalisation. While enthusiasm exists, it is rarely unconditional. The dominant response is not outright excitement or rejection, but acceptance with boundaries. Control over frequency, timing, and relevance is central to whether AI-powered recommendations feel helpful or intrusive.

Younger consumers are significantly more receptive, reflecting greater comfort with algorithmic experiences and data-informed interactions. Older Australians are more hesitant, signalling higher sensitivity to privacy, transparency, and perceived loss of control. Overall, the data suggests that AI personalisation is welcomed when it feels user-led, transparent, and restrained, rather than automated for automation's sake.

## ◖◗ Key Insights

### Younger Shoppers Embrace Continuity

| | |
|---|---|
| GEN Z | 32% |
| MILLENNIAL | 30% |
| GEN X | 18% |
| BOOMER | 16% |
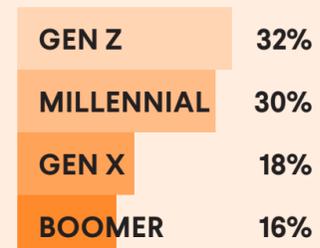
# 19%

Younger consumers are significantly more likely to say they "love" being recognised across sessions, signaling comfort with seamless, identity-driven experiences.

### Control Unlocks Comfort With Recognition

# 37%

Over a third of consumers are comfortable with cross-device recognition when they can control preferences, reinforcing that consent and adjustability, not invisibility drive acceptance.

### Discomfort Is Concentrated, Not Universal

| | |
|---|---|
| BOOMER | 39% |
| GEN X | 18% |
| MILLENNIAL | 6% |
| GEN Z | 4% |
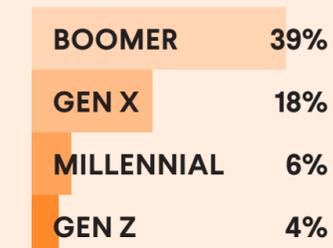
# 19%

Resistance is heavily skewed toward older shoppers, reinforcing the need for optional participation and visible controls rather than one-size-fits-all identity activation.

### Uncertainty Persists Among Older Consumers

# 25%

A meaningful share of consumers, especially Boomers and Gen X remain unsure, highlighting an opportunity for clearer communication and reassurance rather than aggressive activation.

## Strategic Takeaways

**1. Position Identity as a Customer Benefit, Not a Data Capability**
Frame cross-device recognition around tangible shopper benefits, such as saved preferences, fewer irrelevant messages, and smoother experiences, so identity feels like helpful memory rather than invisible tracking.

**2. Make Recognition Explicit and Permissioned**
Ensure consumers clearly understand when and why they are being recognised across sessions, reinforcing that identity is consent-based and designed to respect preferences rather than infer new data.

**3. Use Identity to Reduce Noise, Not Increase It**
Apply identity-driven recognition to limit repetition and over-messaging across devices, demonstrating restraint and reinforcing trust through relevance rather than volume.

**4. Adapt Identity Experiences by Comfort Level**
Deliver seamless continuity for consumers who welcome recognition, while offering visible controls and optional participation for those who require reassurance, especially older shoppers with higher sensitivity.

**24** 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?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| I don't feel comfortable with this | 39% | 18% | 6% | 4% | 19% | 19% | 19% |
| I love it, bring it on | 6% | 18% | 30% | 32% | 19% | 19% | 19% |
| I'm not sure yet | 30% | 29% | 17% | 16% | 25% | 24% | 25% |
| I'm positive, as long as I can control frequency, timing, and topics, and see why I'm getting a message | 25% | 35% | 47% | 48% | 36% | 38% | 37% |

IF A BRAND YOU'VE OPTED INTO RECOGNIZES YOU ACROSS DEVICES/SESSIONS TO KEEP YOUR PREFERENCES AND RECOMMENDATIONS CONSISTENT, HOW DO YOU FEEL?

# Consumer Comfortableness with Being Recognized Across Devices and Sessions

### Recognition Is Welcomed When Permission Is Clear

Australian consumers are broadly receptive to cross-device recognition when it is framed as a benefit rather than surveillance. Unlike general AI personalisation, recognising opted-in users across sessions is more clearly understood as a convenience feature, especially when it preserves preferences and reduces repetition.

Younger consumers show strong acceptance, viewing consistency as a baseline expectation of modern digital experiences. Older Australians remain more cautious, but discomfort declines sharply when recognition is explicitly tied to permission and control. Overall, the data indicates that identity-based continuity is one of the most accepted forms of personalisation, provided it is transparent, respectful, and user-led.

## Key Insights

### Control Unlocks Comfort With Recognition

| | |
|---|---|
| GEN Z | 72% |
| MALE | 60% |
| MILLENNIAL | 57% |
| GEN X | 52% |
| FEMALE | 50% |
| BOOMER | 49% |
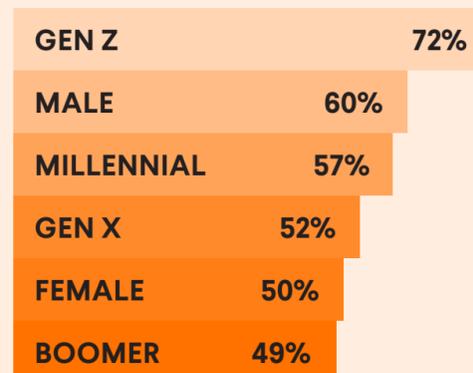
# 55%

Over half of consumers are comfortable with cross-device recognition when they can control preferences. This response is strongest among Gen Z, reinforcing that permission-based identity is seen as a practical benefit, not a risk.

### Discomfort Is Concentrated, Not Universal

| | |
|---|---|
| BOOMER | 32% |
| MEN | 15% |
| GEN X | 12% |
| WOMEN | 12% |
| MILLENNIAL | 4% |
| GEN Z | 1% |
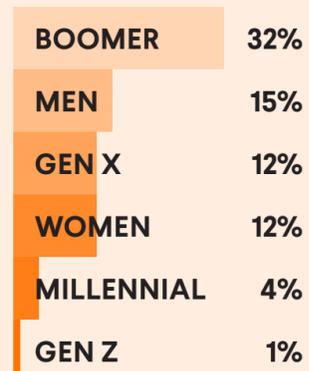
# 14%

Resistance is heavily skewed toward older shoppers, reinforcing the need for optional participation and visible controls rather than one-size-fits-all identity activation.

### Unconditional Enthusiasm Remains Limited

| | |
|---|---|
| MILLENNIAL | 27% |
| GEN Z | 24% |
| FEMALE | 18% |
| GEN X | 16% |
| MALE | 13% |
| BOOMER | 1% |
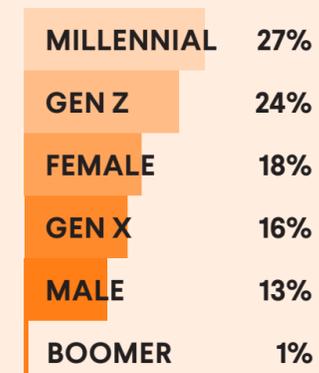
# 16%

Only a small minority express outright enthusiasm for cross-device recognition without conditions. Even among younger consumers, control remains central, signalling that acceptance is pragmatic rather than emotional.

## Strategic Takeaways

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**25** IF A BRAND YOU'VE OPTED INTO RECOGNIZES YOU ACROSS DEVICES/SESSIONS TO KEEP YOUR PREFERENCES AND RECOMMENDATIONS CONSISTENT, HOW DO YOU FEEL?

| RESPONSE | AGE GROUP | | | | GENDER | | EVERYONE |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | BOOMER | GEN X | MILLENNIAL | GEN Z | FEMALE | MALE | TOTAL |
| Fine with it if I control preferences | 49% | 52% | 57% | 72% | 50% | 60% | 55% |
| Love it | 1% | 16% | 27% | 24% | 18% | 13% | 16% |
| Not comfortable | 32% | 12% | 4% | 1% | 12% | 15% | 14% |
| Unsure | 17% | 20% | 11% | 3% | 19% | 11% | 15% |

# Conclusion

**Earning Growth in 2026Through Relevance, Recognition, and Restraint**

The 2026 Australian consumer landscape is not defined by disruption, but by expectation. Digital commerce is mature, habitual, and highly selective. Consumers are not asking brands to do more; they are asking them to do better. Across devices, channels, and touchpoints, Australians consistently reward experiences that feel relevant, controlled, and worth their time. Growth is no longer unlocked through scale alone, but through precision.

This report makes one thing clear: identity works when it feels like memory, not tracking. Consumers respond positively when brands remember preferences, reduce repetition, and create continuity across sessions and devices, but only when recognition is permissioned, transparent, and clearly beneficial. AI-powered personalisation is welcomed under the same conditions. Australians, particularly younger cohorts, see AI as helpful when it reduces effort and improves relevance, and reject it when it increases noise or removes agency.

Equally important is restraint. Messaging frequency, paid retargeting, and onsite experiences all demonstrate the same pattern: fewer, more relevant interactions outperform volume-driven strategies. Email, text, and alerts remain powerful precisely because they are trusted, opted-in channels. Their effectiveness depends on orchestration—ensuring messages are triggered by real behaviour, delivered in the right channel, and suppressed when intent is satisfied.

For brands, the implication is strategic, not tactical. The opportunity ahead is not to chase new channels or emerging technologies for their own sake, but to unify identity, AI decisioning, and orchestration around a single goal: making every interaction feel intentional. This means using data to reduce friction, not create it. It means competing with marketplaces not on breadth, but on relevance, recognition, and confidence.

In an environment where consumers are tightening tolerance and raising expectations, brands that win will be those that respect attention as a finite resource. By building experiences that prioritise value, remember context, and give control back to the consumer, brands can turn stability into sustainable growth, and transform everyday digital interactions into long-term relationships.

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 2026 your strongest year yet.

# Wunderkind

Wunderkind is redefining agentic marketing decisioning, where identity meets AI to deliver increased revenue through personalization across channels.

Our Autonomous Marketing Platform (AMP) uses a proprietary identity graph — tracking 9B+ devices and 2T+ digital events annually — to transform anonymous web traffic into known customers, without third-party cookies. AMP dynamically triggers messages across email, text, and ads, optimizing creative, channel, and timing in real time.

Seamlessly integrating via SDKs, APIs, and natively with ESPs, it fits any stack without requiring replatforming. Brands like Harley-Davidson and Kendra Scott rely on Wunderkind to unlock reach and revenue, with $5B+ in attributable sales annually and consistently top-ranking channel performance.